

Energy Consumers Australia Consumer Profile Book

June 2017



Background

This project is Stage 4: In-depth Qualitative Research of the Energy Consumer Sentiment Survey in 2017 and involved n=24 interviews with energy decision makers across Australia as follows:

Location		Consumer		Business	
		Confident	Less Confident	<20 employees	20-199 employees
NSW	Sydney	1	1	1	1
Vic	Geelong	1	1	1	1
SE Qld	Toowoomba	1	1	1	1
SA	Adelaide	1	1	1	1
ACT	Canberra	1	1	1	1
TAS	Launceston	1	1	1	1

The objective of these case studies is to develop a deeper understanding of how perceptions of the energy market affect decisions and to bring energy consumers to life beyond the data.

More specifically, these case studies:

- Profile users
- Explore their level of engagement with utilities and decision making processes
- Explore pressures and challenges affecting their energy choices; and
- Explore their experiences, intentions and considerations around switching



Notes on reading this report

In preparing this report we have presented and interpreted information that we believe to be relevant for completing the agreed task in a professional manner. It is important to understand that while we have sought to ensure the accuracy of all the information incorporated into this report, information has been gathered through qualitative interviews and is not statistically representative.

Direct quotes – verbatims – have been used throughout the report to illustrate a point and demonstrate the language used or perceptions held by participants.

This project was conducted in compliance with AS: ISO20252 guidelines.



Names of interviewees/businesses have been changed/omitted to protect their privacy

Profile photos are representative only and not of participants/their businesses

Other photos, unless otherwise stated, are of participants homes/premises, taken and included in this report with their permission

Names of energy providers have been removed and replaced where necessary with [company]

Case studies are arranged by location with residential consumer case studies in orange, businesses in blue.



Key Findings



Key findings - consumer drivers



Energy is almost all about cost: With reliable supply and regular billing, consumers see very little else on which to judge their existing providers or evaluate others. There is almost no sense of how providers can differentiate except on cost.

Environment is either very important or not at all: For a few, green energy and reducing their carbon footprint is extremely important. For most, they recognise that it is important to care for the environment but it has little impact on their engagement with energy.



Reliability makes reliability a second order concern: With some exceptions in Tasmania, consumers have had almost no experience with problems with their electricity supply and so consideration of other suppliers is really only around cost. Businesses acknowledge that consistent, reliable supply is critical and this would likely override cost if problems were experienced.

Competition is good: There is a universal view that competition always brings down prices and that consumers should always have a choice. There is little perception of how other suppliers could be different other than based on price with some recognition of shared infrastructure. The downside of competition is the aggressive sales/marketing activity that can come with it.



Key findings - the market

Energy companies are all the same: Where competition exists, suppliers are undifferentiated, there is no brand loyalty and pricing is confusing.



Advice and information starts with Google: Information seeking on energy only really happens if the possibility of switching suppliers is triggered. In this instance, most prefer to do their own research with the internet the first port of call. Often they do little more than compare bills and discuss experiences with friends and family.

Comparison is difficult: Different suppliers present their information in different ways making comparison of suppliers very difficult. The more cynical suggest this may be on purpose to discourage switching.



Limited faith in intermediaries: Business' experience with brokers appears to be mixed. Comparison websites aimed at residential consumers are viewed with some suspicion. This is largely driven by questions around some suppliers not being represented and commission payments.

Key findings - switching

Service issues drive and arise with change: Grievances with suppliers over service or billing are almost always triggered by change - either change of supplier, moving premises or setting up a new service.



Switching should be easy: Consumers are open to change if a better deal was offered. While most have not switched energy providers there is an expectation that it would be as easy as switching phone suppliers or ISPs and would need not much more than a couple of phone calls to do.

Sometimes the act of switching is the point: Switching suppliers is sometimes just to express dissatisfaction and exercise control/power. Those who change for a better deal get satisfaction from the belief they are now better off in terms of cost. In neither case is there necessarily any expectation that the medium/long term experience with the new supplier would be significantly different. The lights will come on as they did before.



Things have to get bad to switch: The relatively low level of engagement in energy means that many don't switch lightly. While switching is not perceived to be difficult it is still a hassle. In the majority of cases consideration to switch needs to be triggered by an alternative offer coming to them. Few will take it upon themselves to consider switching independently of any contact or compelling communication.

Key findings - switching cont.

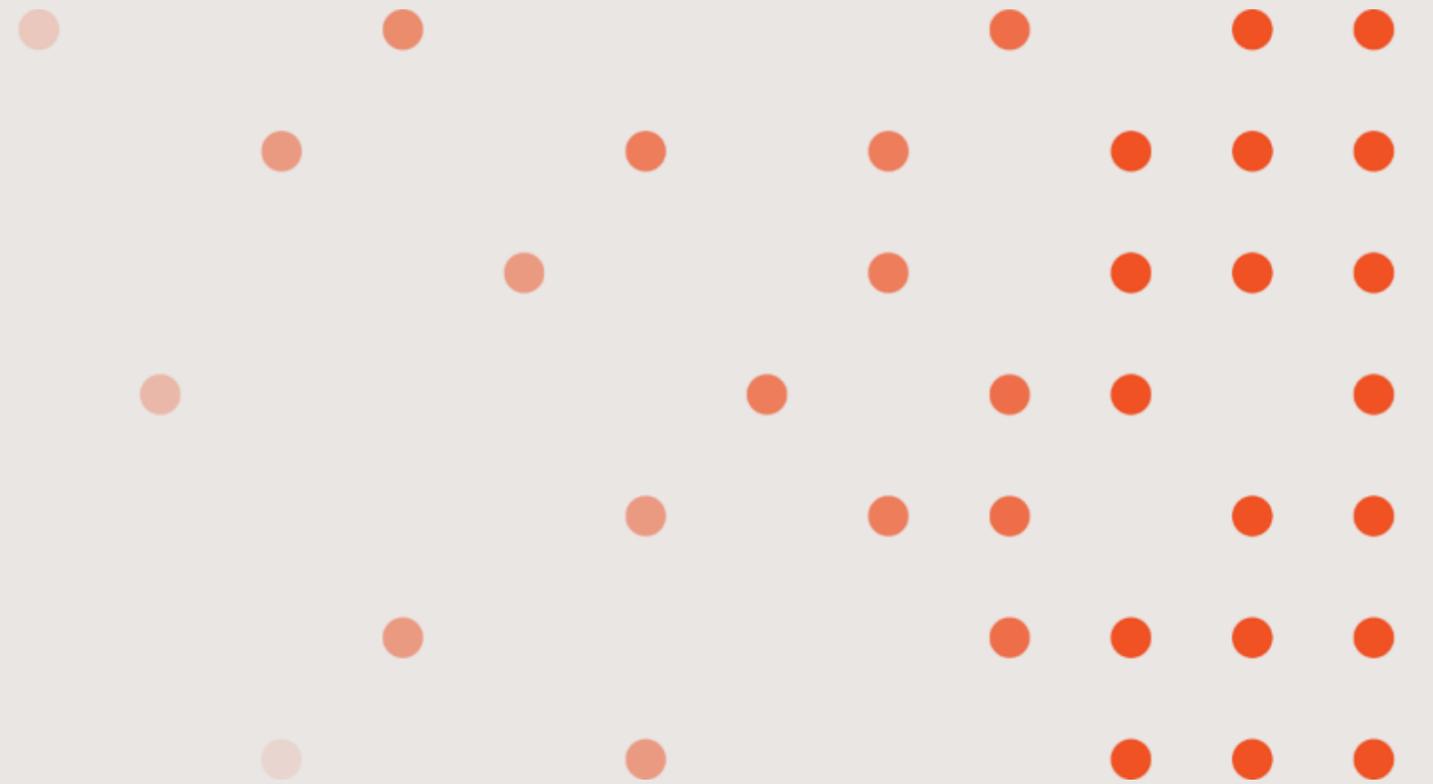
Switchers don't always check: Having made a decision to switch suppliers for a better deal, consumers don't necessarily go on to check their bills and confirm that they are indeed better off.



Case Studies



Adelaide



Single dog-owner watching the bills



- Linda, 48 year old, lives alone, new house, no kids or husband, old and sick dog, living on benefits with chronic fatigue
- Dog costs biggest pressure on household budget
- Visits mum in retirement home close to her on a daily basis but depending on her health doesn't do much more than that

"I got \$100 from the government to offset my utilities bill but I spent it on the dog."



Switching?..

- Switching wasn't hard and has no issue doing it

"I would switch again but it would have to be a big thing, I'm on a good rate with both of them."

Attitudes to energy and supplier:

- Different suppliers for electricity and gas
- Switched electricity company soon after she moved in. She got a friendly visit from a lady selling energy door to door and initially she didn't take it up but when the lady visited again, she was convinced to switch, largely because it was cheaper
- Her neighbours were with that company and they were getting it cheaper
- She gets 20% discount
- With gas however she wants to leave her current supplier because of billing problems.

"They didn't get my address right to start with – this is 78A – and I didn't get a bill for ages and then out of the blue I got this enormous one. It was crazy, like \$6,500 and I am only one person. I refused to pay it and they recalculated it down to around \$400. After that I just don't trust them."

- She initially wanted to go with another supplier but they made putting the meter in too difficult and so she called the current supplier because they made the whole thing easier.
- There is choice but they don't explain environmental benefits enough given it is more expensive

"I am supportive of wind farming and renewables and all that stuff but they need a better way to explain the benefits to everyday people."

"Mum is a good source of info. She plays the cranky old biddy really well. She is empowered."

- Internet for info and friends and neighbours for trusted advice

What have you been doing?

- Manages energy well and given she is on a fixed income stays on top of it.

"I don't have a problem with paying any of my bills but it's easy if you are just one person."

- Conscious about appliances that are energy efficient and noticed the star rating
- Installed expensive energy efficient lightbulbs

"They are \$20 each but hopefully they will last a long time and save me on the bill."

- Installed blinds but not sure they make much of a difference
- 2 new air conditioning units at front and back of house that are very energy efficient
- Now lives in a much bigger house than previously and hotter but smaller bill than previous with old air con

What about the bills?

"I understand the bills but – I'm sure they do it on purpose – you aren't comparing apples with apples. You have to be a mathematician to understand it if you are looking to compare [company] with another company."

Looking ahead...

- Watching costs all the time but on top of it
- If billing issues continue with current gas supplier, might switch but not to [company] due to billing issues

Family man in love with his air con



- Tom, married, two teenaged kids
- Financial services manager
- Large house for last 10 years

"It's a big house and costs a whole lot of money to power this house."

- Private school fees are a big expense, costs of the year 10 formal, music lessons

Attitudes to energy and supplier:

- Lots of devices in the house but biggest energy suck is the air conditioner
- Two storey house and gets very hot upstairs where bedrooms are

"The worst bill we get is the [company] bill around now, which is the end of summer bill."

"Some people in this house have got very used to having the air con on all the time. Me included. There are no winds in this part of town and no natural way to cool the house."

- Does have gas as well with same supplier
- Have been with them since before they moved to the current premises

"What there is not enough of in the utilities industry are organisations that oversee stuff, regulate stuff like they have in the banking sector, making those organisations accountable to the consumer."

"You need an independent body that can deal with the smoke and mirrors."

"Something isn't working, so if Weatherill thinks independence will give us secure supply then great. We are the underdogs here in South Australia. We need to stand on our own and be self sufficient."

- If he wanted more information on energy he'd go to Google to start. Hard to know who to trust, doesn't trust [company]

"We say we don't trust the government but really you expect something on a government site to be pretty reliable, provide me with the right information, point me in the right direction."

What have you been doing?

- Has installed blinds for the heat, hasn't really helped
- Turning all the lights off and appliances and power points
- Loves the air con, has it on from 4pm until late at night, sometimes all night
- Use less in winter than summer

"I've thought about solar. I have a few friends that have it and they say it's paid itself off in four or five years. But we aren't sure if we will stay in this house and we need to get rid of the teenagers first."

What about the bills?

- Biggest bill was \$1500, last bill was \$1200
- Just looks at price and that's it
- Doesn't really care or understand anything else

"Just look at the dollar."

"Peak, off peak. It's confusing. They don't make it easy."

"It's a really difficult thing to match apple for apples. You have those company's that do this for you, but how would I know if another mob is cheaper? You think it's that way deliberately. It's deliberately confusing."

Switching?...

- Considers himself pretty loyal
- In the finance industry so knows the benefits you can get from switching
- Other supplier knocked on his door and he thought he might switch, but it didn't work, got rejected due to credit rating but it seemed suspicious, he questioned it but they didn't respond so he lost interest

"So I tried to switch, tried to stick it to [company] and it didn't work so I thought, well stuff it, maybe I am supposed to be with them? I don't know if I am getting a good deal or not but I suspect they are all the same."

Looking ahead...

- Unlikely to do much about solar until teenagers are gone and they decide if they will stay
- Not keen to switch after problems



Cake maker open to deals



- Family business, cakes and gelato,
- 16 staff, 5 full-timers
- All production done on site with cafe at front, distribute to a range of retail outlets around the city
- Owns building

Attitudes to energy and supplier:

- Utilities is biggest challenge for the business, rising costs
- Pretty engaged, sees that level of engagement as important

“You have to be [engaged]. You have to get on top of it, work out if you are getting the best deal.”

- With [gas company] for four years, have no issues, bills come in and just pay it
- With [company] for their electricity

“Gas not a problem but electricity is really big. Gas is probably the cheapest bill I get but that’s only to run stovetops. When we purchased the ovens, I never thought electricity would get that high”

- Satisfaction with [company] pretty low

“I’ve been with them for three years. I switched because it was a good deal as part of other stuff. We get a 20% discount if we pay on time. That being said, I’m not 100% happy. I’ve had an issue with billing. When we swapped I didn’t receive a bill for 8 months and then we got a phone call saying we owed \$35,000. I contacted the Ombudsman and we are paying it off over time but there are still billing issues. They had the wrong email but never followed it up.”

- Enough choice in the market but no differentiation.

“I don’t see anyone really standing out”



Switching?...

- Has found it easy to switch in the past, bit of a hassle, but does it if the discount is there and the service isn’t

“A month ago we did a comparison, got a consultant in and he said, stay put, you are getting a good deal.”

- Easy to switch and would switch again if he got a good rate or better discount

What about the bills?

- Understands them, checks the price and if they are getting the discount but doesn’t look much at usage
- Still fighting with billing at [company]

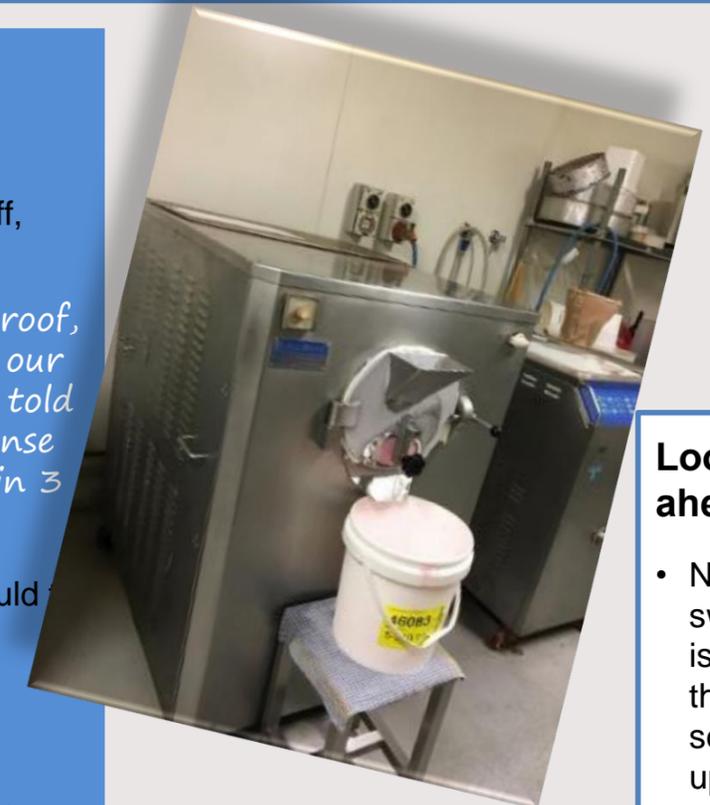
What have you been doing?

- Finds it very hard to save on energy around the business
- Fridges, freezers, display cases, ovens, so much electrical stuff, very hard to pull back

“We did the exercise to see if we could get solar on the roof, but it didn’t seem to make sense given we use most of our energy in peak, in the mornings, but other people have told me different in recent times. It probably does make sense even with the big expense up front. If it pays itself off in 3 years, it’s the way to go.”

- No idea where to go for advice about energy consumption, would providers
- Some of the older machines, the gelato machine and custard cooker are the least energy efficient in the business

“That’s an option, updating them would be more efficient and use less energy.”



Looking ahead...

- Not looking to switch despite issues but thinking of solar and upgrading some equipment

Suburban travel agent wants tailored information



- Leases the building
- Very seasonal, staff levels vary from 8 to 6, casual workers as well as a small number of permanent staff
- Challenge is the internet is undermining business so working harder, very reliant on older consumers

Attitudes to energy and supplier:

- Energy costs are not a big deal, \$600 a month, nothing compared to lease and wages

"The office costs in terms of energy are pretty consistent. Air con and computers are on all day regardless. You do get the after summer one that's a bit bigger. It definitely has gone up over time but I haven't noticed it as much as the home one!"

"The media is telling us we pay the most here in South Australia but I'm not sure if that's true. Can you trust them?"

"I'm content. I'm not happy or unhappy. I have minimal dealings with them. I have noticed in the last 3 years ...I've been aware of the bills going up, I've been onto it, ringing them up and having a whinge."

- Wouldn't go to comparison sites, someone is getting paid, would trust government sites, wouldn't even trust retailer, would check himself

"I think there is enough choice in the market. How many choices do you need?"

What have you been doing?

- Turning off lights and computers, control the air con and don't let staff fiddle with it
- Was almost sure that the lights in the office are energy efficient
- When he installed new sign on directive from parent company, bill shot up and he queried it and they said, look at your usage

"Everyone has to be on the same page. We have five different personalities in the office, some are energy conscious, others not. You don't want to create too many rules. You don't want to be the old fart in the office too much."

What about the bills?

- When the bill comes, just looking at price and usage
- Pretty much understands the bill, roughly follows it, but details such as peak or off peak he doesn't really understand

"Sometimes it is confusing with different rates. It would be in the fine print."

Looking ahead...

- Definitely wants tailored advice for energy consumption for small business. For home use, [company] website has example home online, visual 3D how to run an energy efficient home - assumes government website would have the same kind of advice for small business

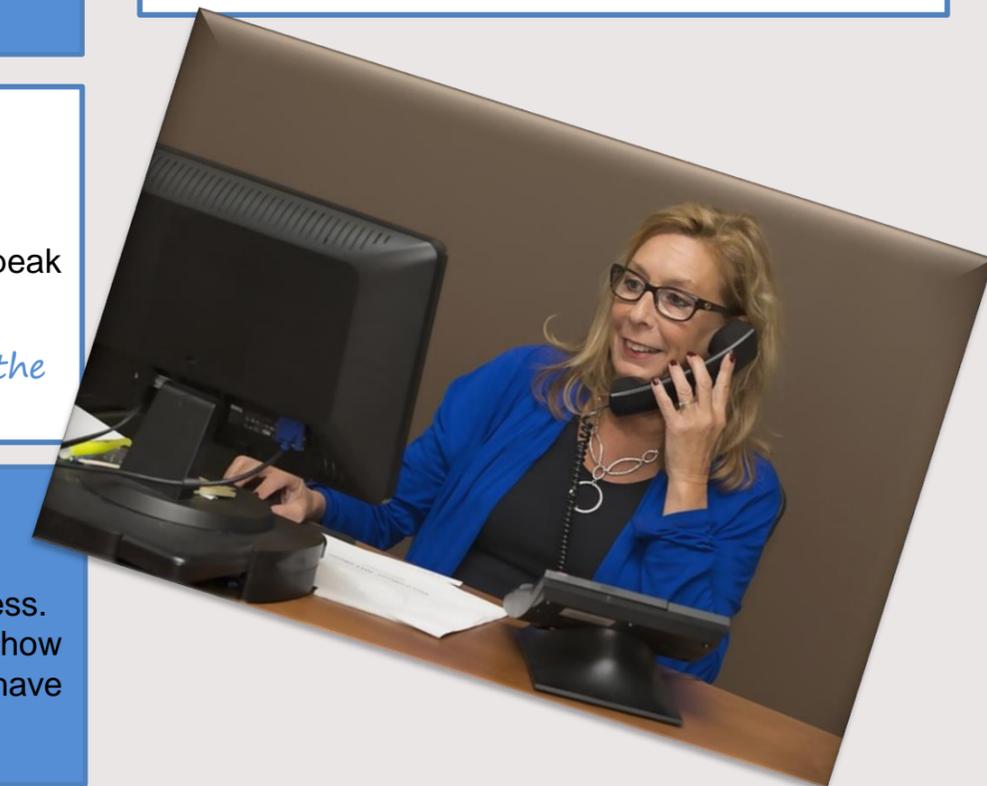
Switching?...

- Loyal customer not actively looking to switch

"Their deals fluctuate as well, who's saying I wouldn't be happy with [company]? But I haven't tested them."

- Switching is all price driven, every 6 months he does a bit of research to see what's out there, looks in newspaper and flyers in mail but doesn't think to go to the internet
- Will shop for a new price and use that with current supplier to get it matched

"It's seamless to switch but you have to have a reason. The bills would have to get pretty bad. Bad service would be a reason too"



Canberra



Family 'locked in' to a plan



- Mandy, early 30's, married with 2 kids 7 and 12
- Born and raised in Canberra
- Works in administration
- Partner in his last year of studying full time

Attitudes to energy and supplier:

- Thinks Canberra has been de-regulated recently and could go to another electricity company, not sure of other suppliers bar one
- Pretty happy with current supplier, has had some confusion with them around arrangements but never had any supply problems
- One of the bigger bills after the mortgage – significant
- Don't really think about the environmental aspects of energy: *"Our focus mainly at the moment is more on money because we are a single income family"*
- Green energy is more expensive and so not an option

"I'd like to be using a lot less as well as paying a lot less obviously but how to do that is probably a different story"

"Most of the time when we're looking for information we go to google. From there I guess we'd call our current energy provider and see what they said ... or even ask friends and family what they're doing"

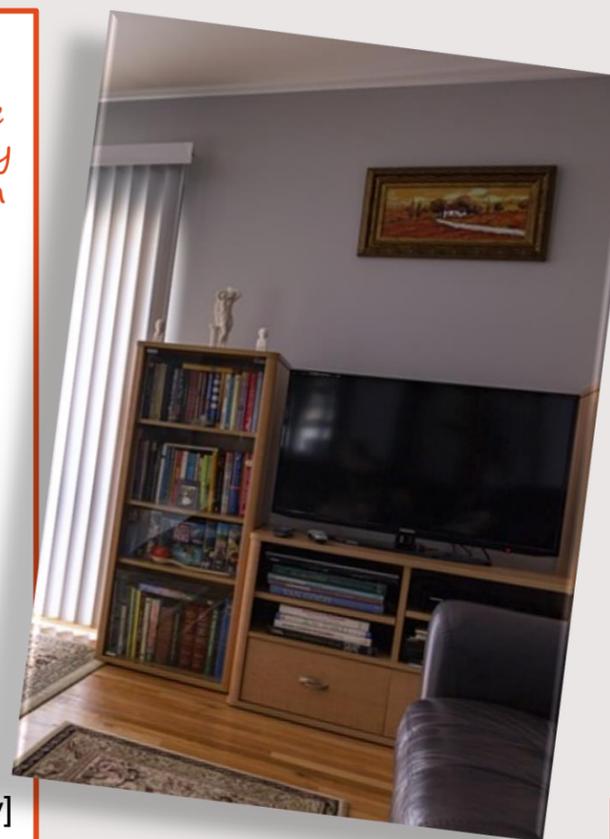
"Would be really lovely to be completely off the grid if you could be but I think that's a really long way in the future for houses"

What have you been doing?

- Had an electricity audit through [company] – was doorknocked offering the service. *"They had a look at ways to reduce your bills"* – get curtains instead of blinds, door spacers, how many appliances on stand by could be turned off and change lightbulbs.
- Had lights changed to more energy efficient bulbs as part of the scheme
- Had something that turns TV off but *"was annoying"* and removed it
- *"Tell the kids to turn the lights off"* ...try to turn things off as much as possible but doesn't feel it makes much difference to the power bill – more power in big things you can't turn off like fridge, hot water, stove etc
- Thought about insulation – looked at it when bought the house but can't afford to upgrade to solar panels – *"If we could afford it, we'd do it"*
- Have new reverse cycle ready to be installed and looked at energy efficiency – *"Went for a better one to help with our electricity"*

What about the bills?

- Look at...*"Just the price really and what we're using compared to the average, which is fairly similar to everyone else's... that's pretty much all, I don't really look at how much we pay per kilowatt or whatever it is, just see what we have paid, what we owe and whether we are using an extremely big amount or whether it's pretty average"*
- Doesn't look at off-peak or peak... *"I don't even know what that means in terms of turning on your TV or whatever"*
- Pretty easy to understand – *"Tells you your usage but who knows what that actually means"*
- On a plan paying a set amount each fortnight – bill shows whether above or below and difference rolls onto next bill – was recommended plan by [company]
- Payments are direct debited directly from Centrelink payments
- Doesn't feel they are paying too much currently



Switching?...

"Thought about it but then never done anything about it... part of it's probably because we do owe money, so we're on a payment plan to continue paying it off, if we switched we'd have to pay that straight away to leave which we couldn't afford to do"

"It's something in the background of your life, you don't think about it when you're running around doing all the other things you have to do.. So I haven't seriously thought of leaving"

- Assumes other companies would be competitive and there maybe benefits in changing...*"Whichever one's the cheapest is who we'd go with... saying that I don't know what the supply would be like"* ... doesn't think supply would be much different as everyone uses same lines/ infrastructure

"As far as I'm aware they're all very similar in price anyway, some of them can offer a ten percent discount or five percent discount or whatever so at the moment it's not on my radar to move"

- Assume switching would be just 2 phone calls – one to current and one to new. As easy as changing phone or internet providers – fairly easy
- Has changed internet provider – service/speed/data related not price
- Important to have other providers, brings down prices and provides better services. Downside would only be choosing the wrong company

Looking ahead...

- Not likely to look for a new supplier – doesn't know what would prompt it, just not a priority

Stress-free renter



- Simon, early 30's
- Fireman
- Rents a unit with a flatmate – lease and all bills in the flatmate's name

Attitudes to energy and supplier:

- Flatmate chose current electricity supplier because they offered a small discount each quarter

"I've been pretty happy with [company] so far, haven't had any reason to think about getting out of the situation really"

- Something you need to think about - significant cost each quarter – but is under control here.
- Cost of energy is not a big concern with stable employment and only himself to think about - Internet and fuel costs more.

"I'm pretty tight with my money, I watch where it goes"

- Believes they have 3 companies to choose from, not sure of any other options



What have you been doing?

"I'm always conscious of turning stuff off when I go out"

- 2 reverse cycle units – close the windows when heating, run air con at night in summer and heater in winter.
- Don't have a lot of appliances to run
- Have energy saving bulbs that came with the unit
- Pretty happy with energy consumption

"You kind of know if you've been using a lot of power...so I don't know how people get shocked by their bills when they come in, I mean you must have been living in the house and using the power when you were there so you must have some idea what's going on!"

Hard to imagine what they could do differently...

"I can't see how we could reduce our consumption and we're renting. If we owned the place it would be solar panels and stuff...that's what I would do"

- Would go to government websites if interested in ideas for reducing costs or other energy information – also suppliers

What about your bills?

- On an Easy Pay plan - flatmate pays a set amount a fortnight into an account with [company], every quarter [company] deduct the bill from that account - currently have a credit in the account ...*"You don't have to worry about the bill when it comes up because it gets debited straight out of there"*
- They split the bills 50/50- pays flatmate in cash as the bills come up

"I just look at it and see how much we've used really, I don't actually look at the bills that often. We don't use a lot of power here. I've lived in share houses before where I've paid a lot more attention to the bill in that a bigger share house with more people you use more energy, it spikes heaps and some people like to crank the heat up to 24 degrees, I'm a little bit more frugal... but here it's pretty comfortable, we don't use a lot of energy, we're both out a fair bit of the time, and it's not a huge apartment really, pretty efficient"

- Thinks bills aren't too bad. Would look for spikes but hasn't been an issue in this place. Expect bills to be higher in winter for heating

Switching?...

"If I thought we were being charged too much I'd look at changing providers for sure. I'd look at how much we'd used and ring up [other company] and ask them how much they'd charge to use the same amount a year and how much would it cost to swap over to you guys"

- No reason to look at changing anything

"I'd have to feel like we were being ripped off to want to change...as long as the bill's not too high I don't really question it"

- Would be principally looking for lower costs...

"As long as the lights come and the bill comes in and it's not a huge bill, that's all I'd be worried about. I'd be looking at the convenience of paying, how much they charge you and whether the power is consistent"

- Would google and speak to friends if looking for an alternative
- Thinks it would be easy to change though getting a credit amount back might be challenging – no harder than changing ISP

"I like the idea of having a choice of supplier"

Looking ahead...

- No plans to change anything

Discount negotiator



- Tyre centre – retail and commercial customers
- Total 4 employees
- Turnover \$1.5-2million pa
- Owner, very hands on – runs business, office, changes tyres - everything
- No one else involved in energy decisions/management
- Own the premises

Attitudes to energy and supplier

“I think they’re all a rip off. Because I’m a business I get charged extra, I’m sure”

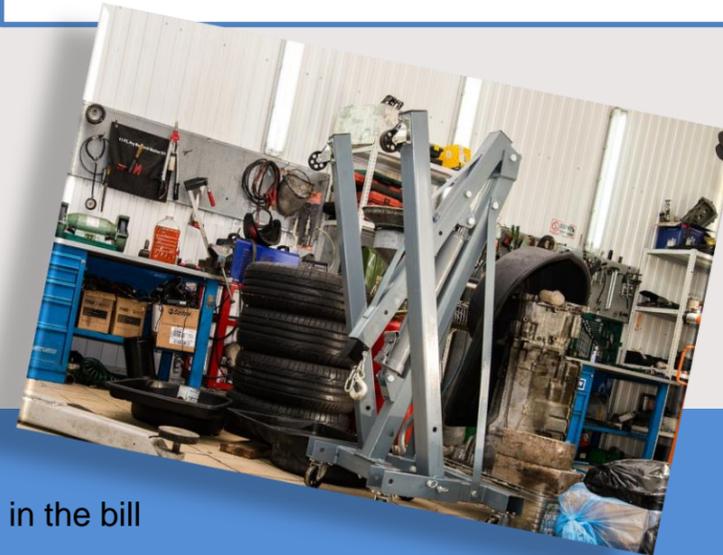
But... *“I don’t have time for it... I know that sounds really silly but I don’t. I just pay the bill and get on with whatever else I’m doing.”*

- Compressor, tyre machines are the big energy cost drivers – lights also though not always on
- Can’t close the office doors because it discourages customers coming in so heating and cooling costs are higher than ideal in the main office..
- Significant expense – *“I have to sign a contract with [company] to get a good deal, but I’ve got to do that every 2 years, if I don’t ring them, they don’t ring me to say hey, we’ve got a special deal for you”*
- Hasn’t looked at using a broker.. *“I screw them down myself”*. They always offer a discount
- Had prompt service in replacing a transformer on the site which used to malfunction regularly
- Pays too much but reasonably happy with current electricity supplier



What have you been doing?

- Doesn’t actively manage energy consumption ... *“There’s only one of me and I can only do so much”*
- Getting new, more energy efficient lights for the office — wasn’t aware until someone knocked on the door and asked if they’d be interested in LED lights - a subcontractor to [company] - they are coming to change them
- Can’t see anything else they could be doing differently in the business
- Other than looking for discounts has not discussed service more broadly ... *“I don’t know whether there is different plans for business, I don’t know”*



Switching?...

- Changed suppliers at home in NSW a couple of years ago to reduce costs but they have crept up again. Went onto comparison site to compare and rang [company] to ask them for a better deal
- Thinks they may have a choice in ACT but not entirely certain

“I guess there must be because they gave me a 15% discount for business, they said that was the most they could give”

- Hasn’t looked into switching – lack of time

“If I went to another one I’m sure [company] would say we’ll give you 20%, so maybe I should look at it....but no, haven’t looked into it at all”

- Has no idea what else might be available to the business. A bigger discount/ cheaper electricity is all they would look for.
- Thinks competition would probably reduce costs but not personally concerned if they have to keep dealing with [company] as long as they continue to be prepared to negotiate on price as they have done

What about bills?

- Looks at total cost not any breakdowns in the bill

“I do check the usage, you know how they have the little graph, I do keep an eye on that because sometimes I’m sure they guesstimate it and if I do think it’s too high I do ring them”

“I do check the meter because I do know at home they get it wrong, can’t say that it’s been wrong here at work though”

- As for the service charge... *“There’s nothing I can do about it so I don’t even look at it”*
- Feels bills are easy to read/understand

Looking ahead...

- Not planning to make any changes, waiting for the new lights from [company] to arrive

Energy...not worth thinking about



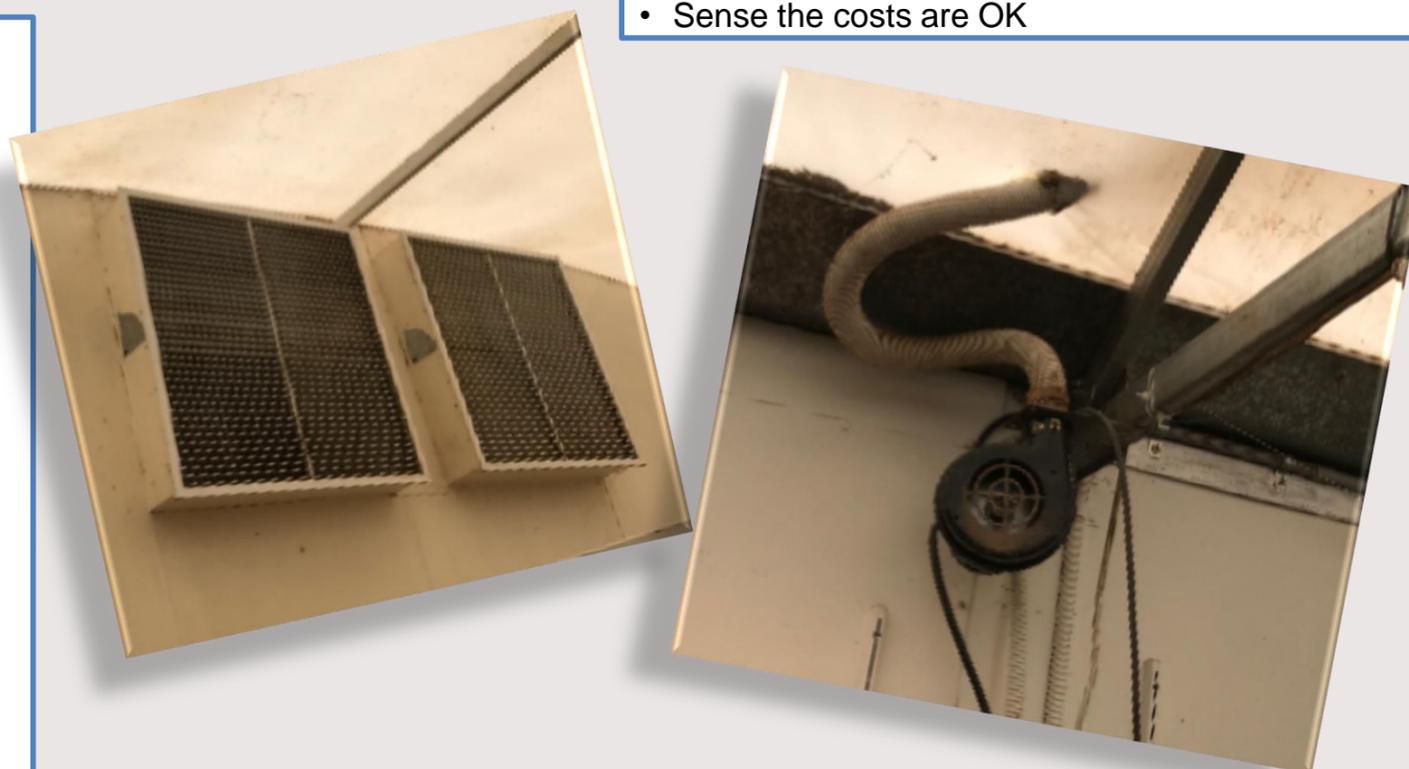
- Nursery business
- Small business, corporate and government clients
- Owner, MD looks at bills/ makes all the decisions though payments are made by office manager

What about the bills?

- Paid by the Office manager but MD signs them off
 - “All I need to make sure is that they’re comparable to previous ones last year, there are not spikes – looking at costs. If they’re not spiking I just pay them”*
- Some seasonality – gas heating in winter. No gas use outside winter
- Sense the costs are OK

Attitudes to energy and supplier:

- Current arrangements are OK.
- “Very little“ attention given to energy in the business... *“There’s more important things to have my attention on, it’s not a big cost”*
 - “Solar would be good for our heating here...but the capital cost of putting solar in...and I haven’t investigated it, but I would assume the capital cost is fairly high...for a small business”*
- Landlord wants him to put in solar but can’t justify cost
 - “My attention’s on the revenue side and if the costs aren’t extraordinary I don’t worry about them too much, I worry about finding revenue to meet them”*
- Doesn’t know where he would go to look for information – hasn’t had any motivation to think about it – *“My current needs are being met”*
- *“Maybe I’m being charged more than I need to be charged and I’m not aware of it”*
...The cost isn’t enough to warrant investigating it



What have you been doing?

- Hasn’t done anything to reduce costs recently – not a priority
- Wouldn’t discount it but *“Not worthy of too much attention at this point”*
- Have evaporative cooler in the store – cost effective
- Split system in the office
- Never used a broker or thought about doing so
- Hasn’t made any changes/taken actions around environmental concerns
- Years ago [company] piped gas in for them to reduce use of cylinder gas – reduced costs for the business

Switching?...

“I’d think about anything but that’s probably as far as it’d go”

- Would need to be approached to prompt any consideration...*“If you come up with another supplier that’s going to halve my bill then, sure, I’d consider it, unless you do that, I’ll stay with who I’ve got”*

“I know there’s other providers but I haven’t been approached”

- Gets approached by suppliers all the time with different products and services but don’t have time to look at them
- Not aware of what is available in the way of different plans or deals
- Believes competition is healthy – ensures price competitiveness

“I may go and spend all this time out of a busy day and getting the same result to what I’ve got so that’s why I don’t go investigating it, because I go and put my valuable energy into revenue producing activity rather than cost reducing activity”

- Would be open to lock into a period of supply for a lower cost if they approached

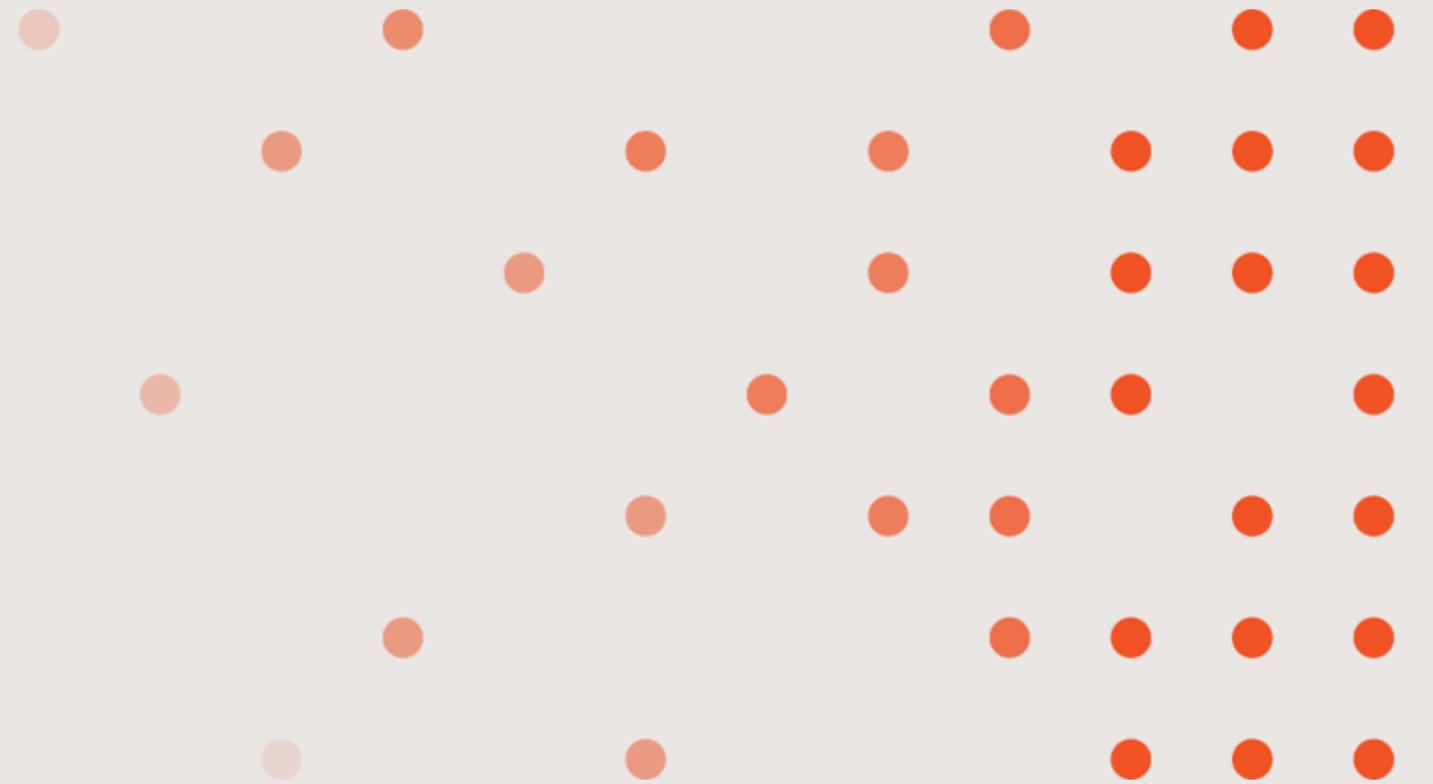
“Telstra for the phones, you tend to use the majors because they provide, I suppose, a consistency”

- Hasn’t changed suppliers more generally

Looking ahead...

- No intention to investigate alternative suppliers or look at any changes in energy arrangements

Geelong



Energy conscious stay-at-home mum



- Leisa, a stay at home mother of two, whose husband is shift worker
- Has switched energy providers recently to receive a better deal
- Currently renting a house while they build a new one
- Feel as though they are limited in what they can do as renters in terms of energy efficiency

“There’s always more you can do to save energy”

Attitudes to energy and supplier:

- Little trust in comparison websites- they don’t have all suppliers

“I looked at [comparison site] but it didn’t have the companies that I wanted to use... it wasn’t comprehensive enough”

- More trust in their own ability to research the best deals

“We’d probably go straight to the [energy provider] websites and read those product disclosure statements”

- Fundamentally, all energy companies are the same – they’re businesses and they want to make money. The differences are largely cosmetic

“I think they all try to offer the same thing, just in different coloured packaging”

“They’re all businesses and they’re all in it to make profit... marketing is their big thing”

Looking ahead...

- The new house is being built with a focus on energy efficiency

What have you been doing?

- Tries to be energy conscious around the house by unplugging certain appliances at the wall, turning lights off when not required and using energy efficient light globes

“Where we can we always try to use the better lights... when we bought our fridge we made sure it was energy efficient”

- Switched gas suppliers in 2015, triggered by a large bill caused by a heater malfunction

“We had a ridiculous gas bill and that was enough to make us look into [switching]”

- Otherwise somewhat limited in what they can do to make house more energy efficient, as they are renting

“In this house it’s hard because it’s a rental house”

What about the bills?

- Looks at their energy bill on a monthly basis to see how their usage compares to averages

“I look at my energy bill when it comes in... I look at the little graph that says where we sit based on how many people are in our house”

Switching?...

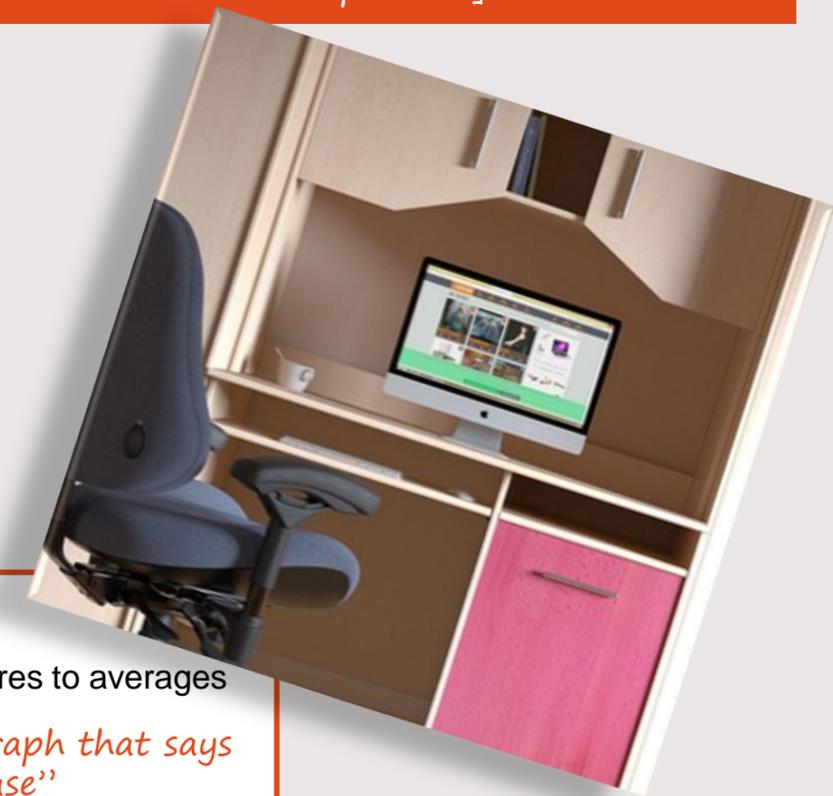
- Have switched in the past – relied on independent research and word of mouth to find the best deal

“We were speaking to our sparky who said he’d switched over and got a one third discount on his energy bills”

“We did all our own research directly on the company websites”

- If there was no market competition, prices would go up and customer service would go down

“Sadly I think it would be more expensive [with no competition]”



Disability pensioner unhappy with suppliers



- Bradley, stay-at-home dad with a child in high school and a wife working
- House is rented
- Energy is a significant household cost – much more than bills for other services
- Has had issues with meter readings and resultant large bills
- Difficulty understanding energy bills, particularly when the different tariffs apply

“There’s someone at home 24/7, and there’s always a gadget on. TV, Xbox, listening to music, there’s always something being used”

Attitudes to energy and supplier:

- Unhappy with current provider, who has incorrectly billed them for gas because they could not access the meter

“They didn’t do a meter reading for about 8 months and were just doing estimates, so I got a \$1,500 gas bill for a month”

- Had a legal dispute with a previous supplier, which required resolution in court

“A salesman came to my door and I said no thanks... he then took my energy bill out of the mailbox and illegally signed me up to their provider... we ended up having to sue”

- Companies are dishonest – they’ll create a new pricing structure but they won’t tell you about it, or make the information difficult to access or understand

“They’ll bring out a new plan and they won’t tell the existing customers and you’re like ‘why aren’t you offering it to me?’”

- Companies are all fundamentally the same, the only difference is price

“They all seem pretty much the same”

What have you been doing?

- Reads energy bills on a monthly basis (despite finding them confusing)

“After the issues with the gas bill I go through [energy bills] but I don’t understand a lot of it”

- Has organised for gas meter to be read monthly, rather than quarterly, in order to keep track of spending

“I said I want it read every bloody month. I’ll pay the extra [cost of extra reading]”

- Would like to explore solar power, but can’t as they don’t own the house

“I’d love to line the roof with solar panels and get a Tesla battery and say ‘eff you’ to the power companies and basically go off the grid... if I owned this house it would be the first thing I would do”

- Tries to be conscious of energy usage – but doesn’t do it very well

“I’m shocking... we try to turn power points off [when they’re not being used] but it’s not a conscious thing”

Looking ahead...

- Going to look at changing providers again in the near future because of billing issues

Switching?...

- Have switched twice in the past – both times due to billing issues
- Relies on own research to get the best deals – not salespeople or comparison websites

“I go straight to the provider websites rather than the comparison websites, because a lot of the time they don’t have everybody”

- Would like providers to offer a physical face-to-face presence (such as a shopfront) for customer service enquiries

“The thing that’s missing is an actual store... it’s better to have that one-on-one contact”



Florist using a broker



- Established florist business
- Has recently relocated to a new premises
- Uses a broker to get the best energy deal
- Flowers stored overnight in a cool room, which uses a significant amount of energy
- Energy costs not a huge concern, but reliability is very important

“The amount of usage I never worry about too much”

Attitudes to energy and supplier:

- Energy is not a significant cost burden to the business

“The amount of electricity we use – it’s not a massive burden. We’re not Alcoa!”

- Responsibility for choosing an energy provider had been outsourced to a broker. The owner trusts that he’ll get him the best deal.

“We’ve got this broker who gets us the best electricity rates we can get”

- Reliability a bigger concern than cost – a prolonged power outage could damage stock, which gets stored in a cool room

“If we had an outage in the middle of summer, it would really affect us”

- Not concerned with environmental sustainability or clean energy – just price

“We should [consider the environment] but we don’t. It’s just a dollars and cents issue for us”

What have you been doing?

- Installed timers on lights so that they are only running when necessary
- New fluorescent lights – didn’t consider energy efficiency, as quality of lighting is more important for a florist than cost

“We renewed all the lights and put in fluoros, when you’re doing flowers you have to have really good vision”

- Regularly reviews energy bills

“Every month I look at the bill. The number I really look at is the daily usage”

- The cool room using a significant amount of energy, but this is an investment in prolonging the life of the flowers

“The money we pay to power the cool room is more than made up by keeping the flowers fresh”

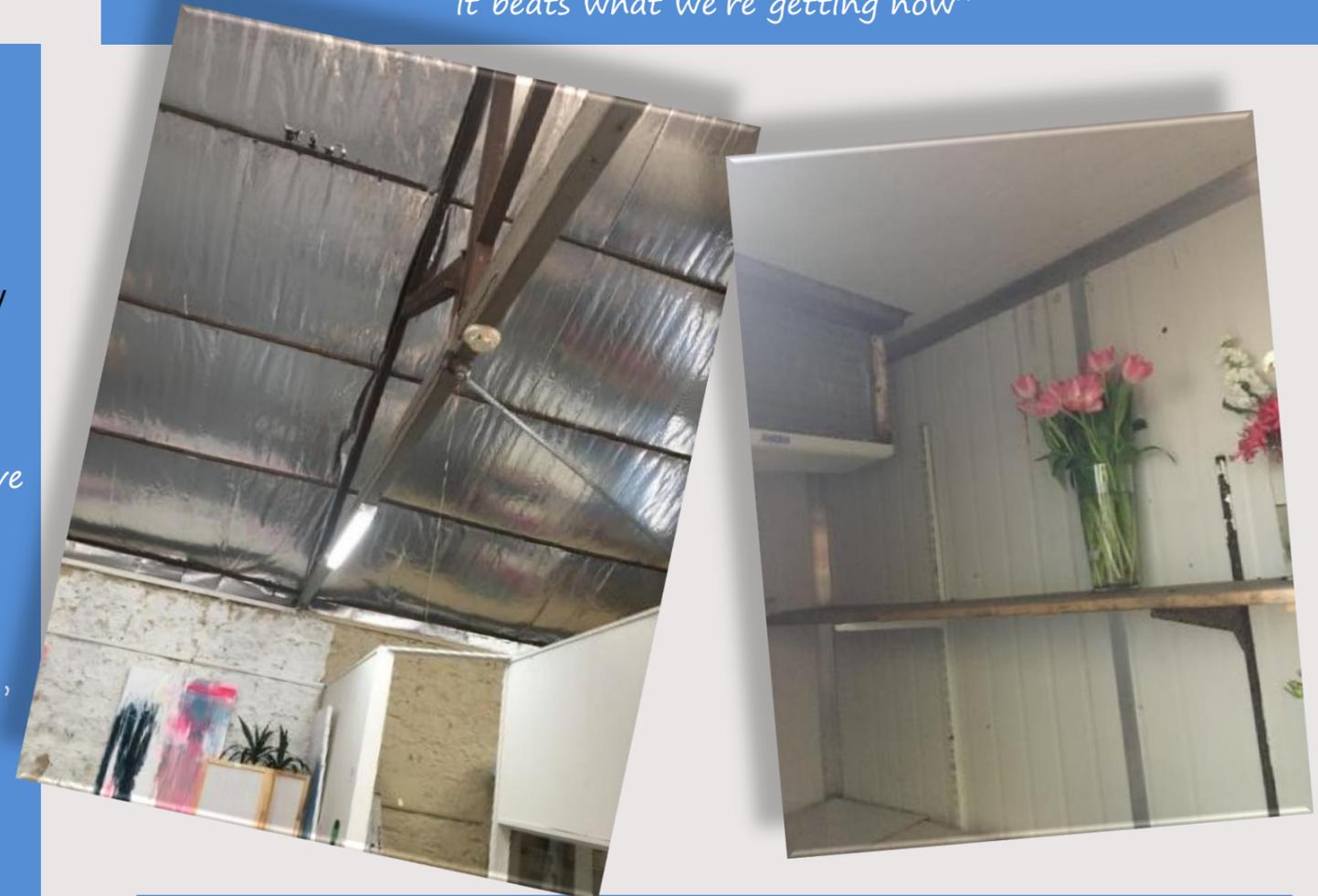
Switching?...

- Competition is good – less competition would cause prices to rise

“Absolutely [prices would go up] – It’s just human nature”

- Sends marketing material to the broker from time to time to see if it’s a better deal than they currently get

“When we see the specials come out I ring him up.. He’ll come by and see if it beats what we’re getting now”



Looking ahead...

- Wants to upgrade the window lighting to be high quality, time-based and energy efficient

Established pub that switched



- Pub, has been operating for 20 years
- Large consumer of electricity for heating and cooling, and gas for cooking
- Switched providers recently through a broker, but not convinced it made a difference
- Not hugely concerned about energy, as long as the lights stay on

"I wouldn't accept anything other than 100% reliability of power supply. The primary requirement is that it be there, and the secondary requirement is cost"

Switching?...

- Hesitant to switch providers of any service due to poor experiences in the past
- "When changing companies you can get burnt, and promised things that don't happen, and that's very, very annoying"*

- However, would be willing to switch if it resulted in significant savings

"If we could get a 10-20% discount that would be a substantial saving"

Attitudes to energy and supplier:

- Satisfied overall with energy – primarily because it is reliable

"We very rarely have blackouts or power issues, so based on that I am satisfied"

- Energy is not a huge cost, and not a high consideration in running the business

"Purchases and wages have a far bigger impact on our bottom line than switching off lights"

- Concerned about renewable energy, and the lack of investment in it in Australia – however, would only use renewables in this business if the price was right

"Australia's attitude towards renewables is a national disgrace"

- A government provider could potentially result in better deals, as they are not driven by a profit motive

- Bills are designed to be confusing – the law should prohibit them from being so

"I believe there should be mandatory bill format requirements"

What have you been doing?

- Switched providers recently through a broker, but hasn't really noticed a difference

"We had a broker come in 6 months ago... he's a regular customer and because he's a regular customer the polite thing to say is yes"

"I haven't noticed a difference [since switching]. I am not severely scrutinising our bills"

- Have put up signs instructing staff to turn off lights when not being used
- Installed LEDs and fluorescent lighting to save electricity

"We have had all our light globes converted to LEDs and fluoros where LEDs were unavailable"

- Regularly maintain refrigeration to ensure it is running optimally

"We have our refrigerator maintained regularly, appreciating that refrigeration is one of the biggest energy costs here"

- Only utilised a broker because they came to him. Otherwise would have likely maintained the status quo

"I would not have [sought a broker] if they didn't come to me"

Looking ahead...

- Having discovered during the interview that their electricity tariffs had just gone up, will investigate new suppliers in the near future



Launceston



Frugal job-seeker living alone



- Evan, early 20's, living alone in a rental unit for several years
- Unemployed and looking for work, participating in 'Work for the Dole' four days per week
- Disciplined with spending and uses a pay-as-you-go electricity meter

"I'll leave things turned off [at the switch] unless I'm using them, and for the most part I can get away with just turning one or two lights around the place to see where I'm going"

Attitudes to energy and supplier:

- Generally satisfied with current electricity supplier as any problems have been easily fixed
- Understands that he may be paying slightly more through using a PAYG meter, but still prefers it to the possibility of 'bill shock'

"I'm satisfied with [the energy provider's] service and what it costs. With having a pay-as-you-go power meter I can keep track of my own usage where I need to and if I've got any issues they can easily be fixed"



What have you been doing?

- The only heating used in the unit is an electric space heater. As the unit is quite small, it is sufficient to heat the whole house, but it is used sparingly due to the cost.

"I've got a little heater, I plug it in and run it for a few hours a day when I need to to heat the place up"

- The unit also has floor heating, but this is never used.

"I don't use the floor heating at all for the fact that it would add a lot extra onto my power bill"

- Passive techniques are used for cooling (opening windows, keeping curtains drawn etc.), as well as ceiling fans.

"To cool the place down I've pretty much got to open the doors and windows and put fans on"

- The PAYG meter balance is checked every few days – usage is well understood and budgeted for, with energy usage going up in winter due to usage of the heater and clothes dryer.
- Energy efficiency hasn't really been a concern when purchasing appliances in the past

Looking ahead...

- Not much interest in changing current practices while living arrangements remain the same. Energy needs and associated costs are understood and budgeted for, and the pay-as-you-go meter works well.

If you could switch?...

- Wouldn't really make much difference to price or service level.
- Believes choice of provider would be at the discretion of the landlord.

"The owners of the place choose who the energy is used through – the tenant only has to really worry about reporting faults, as far as I know."



Sustainability-minded empty nesters



- Karly, 50's, recently retired
- Husband has become knowledgeable about energy issues through work.
- Moved to Launceston from Brisbane, and so have experienced a competitive retail energy market.
- In the process of building a new house, with a heavy focus on sustainability and energy efficiency.
- Makes scheduled payments to energy provider which exceed their usage, so account is always in credit.

“Our electricity bill at the moment isn't even coming up on the radar. We're in credit at the moment because we set it up to pay ahead of time and asking for credit back from time to time because we're not using enough electricity”

If you could switch...

- Prices would go down
- Customer service would improve
- Companies would become more innovative regarding renewable energy

“It would stimulate government to think more about renewable energy ideas”

Attitudes to energy and supplier:

- Energy production is heavily influenced by politics – politicians don't want to make long-term decisions about transitioning the renewables.

“It doesn't seem to be managed well at a government level”

- Bills are designed to confuse – they should include tips on reducing energy consumption, use plain language, and offer translations for ESL people.

“Even when we didn't have to pay anything... it wasn't clear”

- A single supplier is less preferable to an open market, as competition results in lower prices and better services.

“We had the experience in Queensland – when you didn't get a good experience you could say ‘I'm going to [company]’ and then they'd come to the party”

- However, aggressive and pushy marketing by some providers is a downside to this market.

“In Queensland it all became a bit confusing about how it all worked, a bit worrying was the way people came around touting their energy provider. That was becoming really annoying”

What have you been doing?

- The house did not have a gas line when they moved in – they arranged for the council to install one, and now the house is heated solely by gas using ducted heating

“We decided to go with clean gas... we use that for heating, our stove and our hot water”

- House originally had a log-burning fire, which they removed and replaced with a gas fireplace

“We were worried about the emissions from the log burning fire, so we changed over to gas”

- Replaced existing lighting with LEDs
- Energy bills are always reviewed – even though payment is automated
- Generally conscious about use of energy in the house

“With the amount of gadgets of things on standby you have in a house these days, we do [think about their usage]”

Looking ahead...

- The new house they are constructing will have a six star energy rating, and will include solar panels, hydronic floor heating and high quality insulation.



Barbershop open to green energy



- Barbershop
- Owned by Adam, in his early 20's, who also owns and lives in the building.
- Second meter has been installed for first floor, where owner lives, so costs can be separated.
- Energy is a significant cost for the business – around \$1k per quarter.- Is always looking for ways to reduce this cost.

“I think it is [a significant cost]... in the winter time it gets quite cold down here and we've got a big tall roof, so we've really got to crank the heat pump to get it warm in winter”

Attitudes to energy and supplier:

- Doesn't look at energy bill that closely.

“I don't really thoroughly check it, I trust in them that they've read the meter correctly”

- Belief that there is a lack of transparency around pricing because of monopoly.

“You're really forced into buying from [company] and that makes me wonder if they're charging whatever they want for power, because there's nowhere else to go”

- Belief that more competition would force prices down and customer service up.

“A bit of healthy competition would reduce the cost”

- Reliability of supply is more important than cost for the business

“If I knew they were going to be more reliable that would definitely be a contributing factor”

What have you been doing?

- Coordinated with neighbouring businesses to get council to install gas to buildings in the street, which will happen shortly.

“I contacted some guys in surrounding businesses and got two other guys to say they want it and went back to [company] and they said they'd put the infrastructure in”

- Before gas application was approved, was planning to install solar panels and batteries.

“I worked out that the repayments on a solar and battery system would be cheaper than what I was currently paying for power”

- Planned to install a wood fireplace to reduce heating costs, but council rejected proposal.

“I wanted to refurbish an old cast-iron fireplace... council said I can't install a wood heater that isn't brand new”

- Replaced existing lighting with LED's, but otherwise haven't really thought about efficiency of appliances, as lots of appliances (towel heaters, dryers) don't really have more efficient alternatives

“Hairdryers use a lot of power – that's not something you can really get around, you just have to consume it when you use it”

Looking ahead...

- Now that gas is being installed, expects electricity costs to decrease significantly. Installing solar panels is no longer being considered in the short-term.

If you could switch...

- Would force existing supplier to lift customer service.

“It would definitely force [company] to step up their game”

- Would consider paying more for energy to come from renewable sources, if this was offered.

“Paying a higher rate for green energy is definitely something I'd consider”



Frustrated pharmacy owner



- Established Pharmacy
- Comprised of two premises – a retail pharmacy and 'sterile facility' where drugs are manufactured
- Reliability is critically important – losing power to the cooling system at the sterile facility could damage stock
- Frustrated with the lack of competition in the Tasmanian energy market

"We've looked at ways to increase our energy security, and also ways to decrease our energy consumption"

Attitudes to energy and supplier:

- While he can understand his electricity bill, believes they are designed to be confusing

"Some people aren't good with numbers at the best of times... they'll just accept what it is and pay"

- Reliability of supply is more important than cost for the business.

"There's a lot of refrigeration [in the sterile facility] holding stock"

- Monopoly is a point of frustration

"The most frustrating thing about the Tasmanian market is the lack of competition and choice"

- Nonetheless, is largely satisfied with [company]

"I've been reasonably happy. I've never met anyone from there, I just get the bill"

What have you been doing?

- Recently installed LED lighting in the retail pharmacy to reduce energy costs

"In the last 2-3 years we installed LED light panels to minimise costs. That's made a bit of a difference"

- Explored the possibility of installing gas for heating, but there was no gas line near the building

"We have [considered gas] but it would be a logistical nightmare as there aren't any gas lines running past our facilities"

- Installed timers to regulate lighting, so that lights were only turned on where necessary

"We've installed automatic lighting with movement sensors – the lights turn off automatically, which has made a big difference"

- Investigated solar panels and batteries after Tasmanian power outages in 2016, but did not proceed

"We haven't instigated it, but we've explored solar and battery power as a result of the energy crisis last year... it was more about energy security"

Looking ahead...

- Sees little scope for change in the future without an open market for energy companies

If you could switch...

- Would likely result in lower prices and better customer service

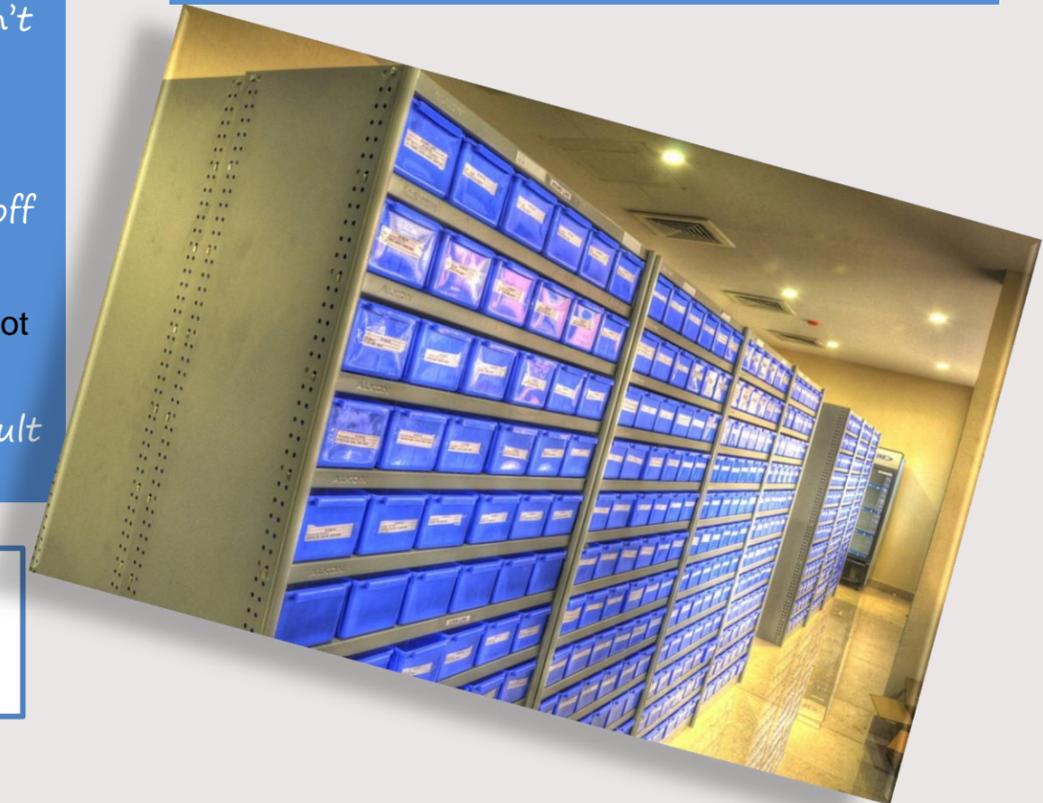
"I'd like to have a choice of supplier... you'd see some variations in pricing"

- Concerned over the potential for small retailers to pop up and provide below-standard service

"My only concern is.. sub-standard operations coming in and providing a rudimentary service"

- Would likely consider switching if the opportunity existed

"If I had more options I'd look at every single one of them"



Sydney



Green-conscious young renter



- Felicity, recent university graduate
- Physiotherapist
- Renting very small apartment with her partner
- Trying to save for a house so very disciplined with budget

“Cost of living isn’t really an issue because everything we do is about trying to save a deposit for a house.”

Attitudes to energy and supplier:

- First time deciding on energy supplier as previously lived in uni accommodation
- Highly engaged, made decisions together as a couple
- Used the internet to compare and contrast possible choices but went with [company] solely because they were clean, green and natural

“They are natural energy. When we were researching we decided that even though natural energy isn’t the cheapest option it’s the best for the environment. We are the generation that will take over the world and if we don’t invest in this energy now, well then the prices won’t go down and other people won’t be able to get on board. We have to take those steps forward. As it becomes more mainstream the prices will come down.”

- Good customer service so far
- They had used a comparison website but were freaked out when they called them on the mobile as soon as they got off site

“They called us as soon as we got off the website and it was creepy.”

What have you been doing?

- Even during uncomfortable summer weather didn’t opt for air con, just kept blinds closed and used an energy efficient fan
- Purchased energy efficient appliances
- Lights off most of the time
- Have a bar fridge but don’t turn it on (suspect it would be the most energy inefficient thing in the apartment)
- Feel they understand their bill well, always open and look over it to see if they have got the discount for paying on time

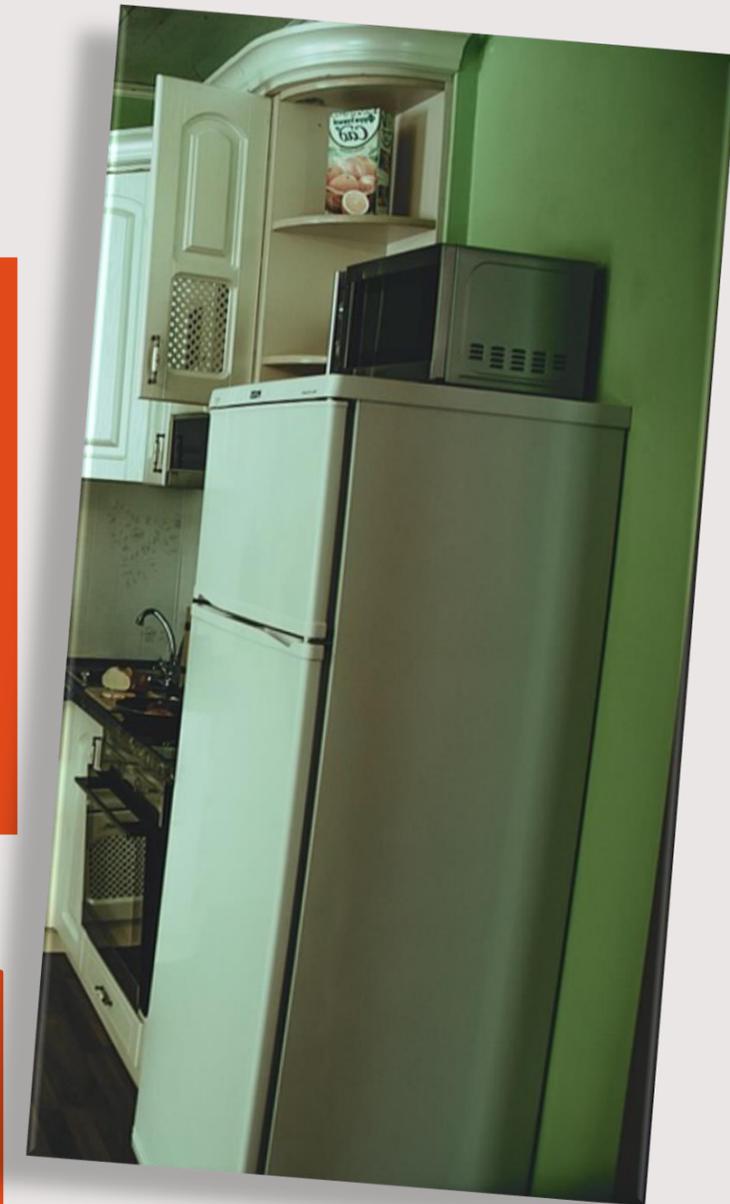
What about switching?

- Not interested in switching unless current supplier decided to become less green

“If they decided to go back to coal or even went 50/50 coal/natural, that wouldn’t work with the environmental credentials we went for. It is more expensive but the natural aspect is important to us. It would be a deal breaker if they did that so then I would look to switch.”

Looking ahead...

- If they manage to buy a house, will insulate, make sure there is lots of natural light, energy efficient lighting etc.



Disengaged mortgage-free dad



- Brian, married with two teenage kids, one at private school and one doing apprenticeship
- Living in freestanding home
- Mortgage free and only one lot of school fees to pay; managing all bills but they do come at once so need to keep on top of things

“Cost of living doesn’t get any cheaper these days. Private school fees are high but manageable. We don’t have a mortgage so that’s great. It’s just when everything comes at once, the water and the electricity. It’s just a combination of things.”

Attitudes to energy and supplier:

- Been with current electricity supplier for a number of years, can’t quite remember how long

“We get a discount as long as we pay by an allotted time. I think it is about 15% or something. I’m not entirely sure. We were with [company] at some stage I think. We changed because of the discounted rate.”

- Not very engaged

What have you been doing?

- Constantly turning stuff off that kids leave on, on their back about it
- Kids often leave the ceiling light on in the hall for no reason

“The kids have the light on, I turn it off. The fan is on, I turn it off. I am on their back. If you can open a window up, do it rather than have the light on. It’s just a waste. My wife does it a bit but it’s mainly me. We just have to save a bit of money where we can.”

- Insulation, changed lights, careful about energy ratings on appliances, thought about solar but not seriously

“The upfront investment in solar is big. It’s not cheap.”

What about the bills?

- Understands the bill

“It’s pretty straightforward. Sometimes I flip it over and look at the back, see how much we actually use.”

- Opens bill straight away and pays a bit per fortnight, splits bill with wife so becomes manageable



What about switching?

- Would go to the internet, call the different energy providers as well if he was interested in switching
- Has had someone from another energy supplier come to their door to try to get them to switch but not interested
- Last time switched was a lot of hassle, would have to get bad or be offered serious discount to do that again
- Who do you trust? Hard to tell

“That’s the hard part, you need to do your homework and hopefully what they are telling you is the truth. Governments are now are trying to do their stuff with energy, get the ACCC and the consumer watchdog trying to bring prices down. You don’t know where it is going to end up eventually.”

- Enough choice but if you are comfortable you stay put instead of mucking around
- Wouldn’t impact him if he was forced to stay with one provider but more of an example of “the government trying to control us again.”

Looking ahead...

- Has thought about solar in the past but hasn’t done much more than think about it
- Has heard about smart meters but no idea what they do

Security expert with home office



- Married with 2 adult children
- Security consultant
- 3-4 other employees, but varies

"I just got the summer bill. That was pretty intense, pretty high. It's the air conditioning and the pool. I do notice it."

"Someone is in the house all the time, either living or working. Sometimes the girls are here, sometimes not. There is the cost for computers, air con, lights. Everything is on 12-14 hours a day."

Attitudes to energy and supplier

- Has solar including solar heater for pool
- Very happy with solar, paid back a fair chunk of it already
- Plans to switch electricity supplier any day now

"I'm not happy with [company]... I am looking to change my meter over. They want to charge me \$10 a month and now I have 4 others offering it me for nothing. I have friends advising me to leave. I am looking to make the most of what's on offer at the moment."

Apparently Harvey Norman is even getting into the energy thing."

What have you been doing?

- Heat pump, insulation, efficient lighting

"I'm always wandering around turning off lights but who knows if that helps or not."

"The hot days come and you want to use the air con less but you just have to use it."

"We signed up for solar because it was a great deal. But it was also the right thing to do."

What about the bills?

- Does pay close attention to energy bill
- Bills easy to understand
- Does look at the bill closely, compares months, checks if he gets the 25% discount

Looking ahead...

- Once he gets more than a few hours to himself will review all the material (he has a spreadsheet!) and make the switch so he has a smart meter



Switching?...

- He wants to switch and has done spread sheet about changing
- Getting reading to switch requires effort and time
- Current supplier wouldn't offer a smart meter for free, wanted to change \$10 a month forever, called them and said this was a deal breaker, has been offered meter for nothing so will switch as soon as he has a few hours to sit down with everything and make the choice
- Has switched numerous times before for the discount; usually very brand loyal, has remained with same bank and insurance company
- Gets info from all places - friends, internet, hand outs from shopping malls, flyers in the mail box
- Lots of choice in the market but can be confusing:

"It's a minefield. It's designed to be that way. It's so confusing."

- Hates comparison sites, has used them in the past but questions what their agenda is and their aggressive approach to selling

"Those comparison sites, you call once and then they are your best friends, ringing you every day. Its annoying. And the information isn't transparent."

New business owners



- Pizza franchise
- First business, owned for 3 months
- 25 staff
- Going well so far, biggest challenges are keeping track of all admin and making sure they make a profit!
- Lease of the premises is also a big expense

Attitudes to energy and supplier:

- 25% discount from current supplier which is for both electricity and gas
- Happy with service and costs
- Previous owner was with the same supplier and they offered them as the new business owners the same discount
- Researched online for other providers and couldn't match the discount
- First and last port of call for information is online
- Prefers a conversation over the phone about energy questions with their energy provider, most trustworthy source of information
- Sometimes easy to find information but sometimes there is a gap, especially around terms and conditions

"You read what you get from the energy provider and you do wonder, is something missing?"

What have you been doing?

- Hard to cut down energy with pizza ovens having to run, fridge, no air conditioning because open place, need to have lights

"Ovens need to be started early. Lights need to stay on late. There isn't much you can do."

- Try to make staff aware of energy use within the restrictions imposed by the business needs

"The staff are mostly very good, they turn things off if they are not needed. We don't talk to them about it much though."

- Would love more information about how to cut down on energy consumption. If they would looking for more of this information, the internet and the local paper would be the first port of call as well as phone call to other providers

What about the bills...

- Looking only at price, are they getting the discount, how much energy they are using
- They feel they understand it, there are a few terms they have to check to fully understand it but charges make sense

"We both look at the bills. We check if we've got the discount and also the final cost. That's it. It's not a big cost. It's manageable"

Switching?...

- Not looking for anything at present but no opposed to it, doesn't think it would be difficult

"A better discount would make us switch. You could go looking at it. We aren't actively looking but we are open to it."

- Good service – but if customer service was a problem they would switch

"Definitely if they don't have good customer service, a good response when you call them. I like talking to a real person."



Looking ahead...

- Unsure ... keep monitoring the costs but that's it

Toowoomba



Dollar conscious mum



- Marina, early 30's, married, stay at home mum
- 3 young children
- Was a full-time accountant but home with the kids currently
- Biggest challenge is wanting to stay home but not sure if they can afford it:

“Cutting our cost of electricity is one of the things we're going to try to do, so we're just looking at the moment at where are we spending all our money and where can we cut back a bit, or change suppliers or whatever”

Attitudes to energy and supplier:

“I think we just went with whoever was in this area... to be honest. I think when we were both working we never really looked at the numbers, we just paid the bill and never questioned it. We've always just been with the big name suppliers.. Telstra for our phone, BUPA for our private health...” and was unaware that she has no choice of electricity supplier currently.

- Happy with connection, communication and service from current supplier but... *“You see your bills just going up and up and you know you're being ripped off but you don't know if there's anything you can do about it...other than solar”*
- Current focus is entirely on reducing cost as of this year and the arrival of the new baby:
“There's a part of me that would love to do more things to help the environment but I know when it comes to time and money, environment is going to be bottom of my list and it's terrible”
- Key influencers and sources of advice are other family and a few close friends based on their experience
“Even if I ring [company] I don't think they're going to have any suggestions”

What have you been doing?

- Exploring all avenues of cost, big and small: Reviewing health insurance providers, rethinking whether they need Foxtel, not using the lights on the tennis court, looking to sell some investment property and subdivide their block
- Changed all lights and fans to energy saving alternatives and replaced the air conditioner when they moved in – on the advice of an electrician

What about the bills?

- Perception they are paying too much for electricity is based on absolute cost of her bill, big increases in recent times and comparison with friends and family
- Bill is clear and easy to understand - looks only at total cost and the graphs showing usage over time

“The only thing we've been trying to do is just cut back on like having the fan going, the air con, the heater in winter”

“Started running the dishwasher at night, I try and do a load of washing (at night), I have a timer on that and then hang it up first thing in the morning...they always say it's cheaper to run it at night but I don't know if it is or it isn't but I'll give it a try and see”

Looking ahead...

- Sought an online quote for solar but waiting for more information, not sure the payback on outlay will be worth it
- Waiting to see what difference the reduced usage measures will have on their bill

If you could switch...

“I'd definitely go with who's cheapest!, I'd ring around the other companies and see what they offer” – expects prices would come down with more competition as long as more than 2 providers

- Expects it would be easy to change as long as there are no transfer/connection fees ...*“It's probably just down to these 2 charges, the consumption charge and the service fee charge...there's not much else really”*... assuming continuing good supply



'Switched on' green dad



- Will, early 30's,
- Married with 3 kids
- New home with a pool, mortgage
- Just had solar installed. Had one kilowatt in previous house under a QLD government subsidy scheme



Attitudes to energy and supplier:

"Cost was a bit of a shock when we moved in because we came in over summer when it was really hot so everyone's using the pool...so we've probably got our biggest electricity bill of our lives in that time"

- Trying to come to an understanding of power cycles in the new house – need a whole year to understand seasonality. Will make budgeting easier in future.
- One of the larger expenses apart from mortgage.

"[Company] are not too bad...but when got the solar installed that did take a fair bit" – had to take day off for inspection. Wanted to go with other supplier for everything then but couldn't

- Good to reduce energy costs but...

"Going to solar wasn't to reduce energy costs, if I can reduce any costs another way that's all good, it was primarily environmental but under that if we can save money at the same time, that isn't a bad thing. At the same time I'm not expecting the system to pay for itself, some people go in and say this will pay for itself in 10 years but that's not my motivation"

- Solar and batteries are about having more personal control which is good.
- Has toyed with the idea of going off grid but not seriously - likely to be cost prohibitive
- Energy shouldn't all be about making money at the expense of society or the environment... *"I've written to state and federal MP's about renewable and waiting for answers from both of them... there should be a transition within society...and I'm a little distrustful of how energy companies have managed the development of new networks and other bits and pieces in the past"*

What have you been doing?

- Benefited from solar and the rebate in their previous house and so planned to upgrade their solar in this new house and budgeted for it

"One of the main drivers for getting solar on was not necessarily to reduce our bill as to move away from coal as much as possible as an energy source...When I looked around for different energy solutions was aswell which ones future focused, which ones actively trying to transition"

- Have insulation already in the house . Limiting use of 2 air conditioners. Put in LED lights all through the house
 - Having solar has been the main focus for reducing their footprint
- "We have looked for those lower appliances when we redid the kitchen but they still had to fit a design element for my wife"*

- Still have to teach the kids to turn the fans and lights off in their rooms, the heat light in the bathroom – still opportunities to reduce - *"The little things add up"*

"I went through [company]...they've got solar command which actually shows you your usage versus what's being produced and ...you can see oh gee, there's the kettle going on and so you start looking through and getting an understanding"

- Distrustful of government because of power of lobby groups – energy policy seems at odds with science. Not much information from energy companies – they're in it to make money. There are still institutes and think tanks that do scientific studies and present facts
- Curious about all the costs going to the bill but process seems to work fine – have been watching it and trying to reduce it
- Haven't approached current supplier for any options – assumed it was one size fits all.
- The feed in tariff needs investigation – not clear how they are treating that

If you could switch...

"I think choice is a really good thing"

- Can't trust green energy offers because you can't prove it... *"You could buy renewable energy, how do you know it's renewable energy going to you?"*
- Might bring costs down but then impact of greater government regulation might drive it up.

"That's probably the only reason I'd look at choice, if another operator was better, more committed to environmentally forward thinking, if it was just another provider offering the same sort of things then I probably wouldn't consider changing"

- Probably would think about it if it was cheaper - have changed other suppliers for a better deal – phones, internet, health funds, banks etc

Looking ahead...

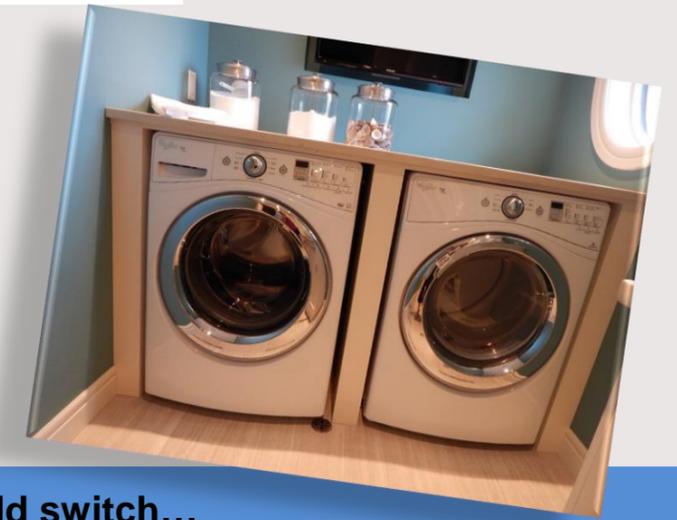
"Potentially looking at storage, I would love to in the future, to see how that works" – waiting for prices to come down

- Might need to put more solar in to cover full usage with the pool
- Wants to be able to store to manage through blackouts
- Interested in exploring some apps that actively make you aware of energy use

Frugal sole trader working from home



- Remedial Therapist
- Single mother Hasn't always lived in Toowoomba so has experience of competitive energy market



Attitudes to energy and supplier:

"We don't have options here and it sucks because it does, it really does, there's no competition there so they can charge what they like"

"[Company] was never my first choice. If there was a another choice I would always pick a different place"

- Heard 'horror stories' of older people being taken advantage of by energy companies

"The cost of living's gone up but the cost of earning an income has stayed the same so it's making it very difficult to make ends meet"

- Believes in solar - friendlier for the environment, 'it's there', but can't afford it
- "I am the first for solar. That is one thing I believe everyone should have"*
- Prepared to spend more for energy efficient appliances and the longer term savings – has done this with TV and dryer
- Believes appliances have a bigger impact on cost than lights or hot water.

What have you been doing?

- Has lights, fans in the massage room and sometimes has to run heaters even in summer depending on the clients... *"One of my heaters isn't exactly the most energy efficient but the other one I've got is a dimplex eco-heater which is pretty good but it's still electricity"*
- Has a fireplace but it isn't enough to heat the house. Draws curtains in winter. Puts socks on before heaters.
- Prefers to open windows than use air con... *"I have an air conditioner too in my room but I try not to turn it on if I can help it...I know to keep it at 25 degrees even if it's 33 degrees... I'd rather deal with the heat than deal with the air conditioning bill"*
- Has changed to energy efficient light bulbs...*"I try everything to keep them down, I unplug everything except the microwave because I need that for heat packs"*

What about the bills?

- Bills have gone up... *"I normally have to get extensions"*
- Pays as a residential user but claims a percentage against her business
- "I can claim dryer, washing machine too because of the towels I go through and I can go through a lot of towels based ...on 3 towels per client"*
- Bills are easy to understand... *"I guess I don't delve that deeply into it, I know what to look for in terms of tariffs and stuff like but other than that it's not like I have a swimming pool to deal with...they're not too bad to comprehend its just the amounts!"*
- "I often find the service fee tends to be a lot more"*
- Apart from extensions hasn't discussed her bills or options with [company] – never occurred to her

If you could switch...

- "I could save a heck of a lot less if I could go back to say [company]"*
- Has used comparison website for various services, including energy
 - "I'm too busy to be able to ring up each individual company"*
 - Wants more competition to keep prices down: *"Business wise I think everyone should have that option, especially in business... we have so many other options, who we want to go through for internet..."*
 - Has lived in Brisbane in the past... *"In Brisbane I believe it started as [company] and I ended up going to [other company] because my gas was with [other company] as well and I could get a discount... it gave me the option to do it online"*
 - Decision would be entirely based on cost – looking at the service fee as well as usage charges.

Looking ahead...

- Relocating to Brisbane later in the year for personal reasons and intending to build the business up there – will go online and find the cheapest alternative when she gets there

Business always looking for savings



- Export company
- 15 staff
- Energy decision maker manages documentation, funds management and the office (staff, bills etc) – remit doesn't cover plants though would likely be consulted/involved in any review of those
- Main challenge is always seasonality of the business and meeting overseas contracts with complex/difficult global trading partners

Attitudes to energy and supplier:

- Energy cost is significant in the business but fairly low down the list of costs – wages, rent... *"We spend more on stationary"*

"I'll be honest, it's not something we really carefully look at, there's a power supply so let's go"

- Energy consumption is not too bad, pretty happy with it - *"Not a drain on the business"*
- Don't think too much about it because there are no alternatives so no point thinking much about it

"Haven't had any issues with power, we get the bill every month and we pay it, we're satisfied in that we have power, I don't recall having had any blackouts...which is good"

What have you been doing?

- Haven't look at alternative plans/negotiating with current supplier
"Never really crossed my mind"
"I don't know how we could with a leased premises.. there's not much that we can do, that I'm aware of"
- Not really thought about power from a green/environmental perspective
"I've never put a lot of thought into it other than looking at the bill"
- Bills are easy to understand - looks at costs and graphs. Don't read the newsletter and pamphlets that come with it.
"If the bill did significantly spike for no particular reason then yes, I could look at it"
- Don't put much focus on the bills/costs - looks at bill in relation last month, factoring in new staff or extensions to office space.
- Hasn't sought to do anything to reduce energy consumption to date but role changing to become more focussed on processes, business improvements and service provider review
- Would probably look at solar, the air conditioners, the types of lights they have if they owned the premises – but won't spend the money on a leased premises

Looking ahead...

- Would definitely look at alternative suppliers if they become available
- Wondering how opening of Australia's largest solar farm outside Toowoomba will impact supply and costs for them
- Issues in South Australia (state based and their own unique ones) have raised the profile of energy costs and supply which may prompt a bigger review of their plants in the future



If you could switch...

"The business does look at where we can save money and if we can save money on power at this office through choice then we would absolutely look at it"

- Went through a big review of Insurance costs 2 years ago – used a broker for their expertise. Constantly looking at shipping costs. In the process of changing banks now. Have gone through car leasing costs recently. Shortly looking at phone bills.

"We're always looking to save"

"With energy it would basically come down to supply and cost – will our supply change? Will it be any better? Will it be any worse? And will the cost be better? And if the answer is the power won't actually change but the costs will be better then absolutely we'd change – so it wouldn't be a huge process"

- Would do it himself with the Financial Controller for the office but for the larger business including the plants would look at bringing in a broker to work with him.
- Can't see any downsides to changing ... *"It really doesn't matter who the supplier of that electricity is because its all coming through the same network"*

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