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Energy Consumers Australia

Energy Consumer Sentiment Survey

July 2016

Table of contents

Notes on methodology

This online survey was in the field from 30 March to 14 April 2016.

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

All other tasks were completed by Essential Research.

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

- The sample was stratified by state, territory and participant type, as outlined on this page.

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

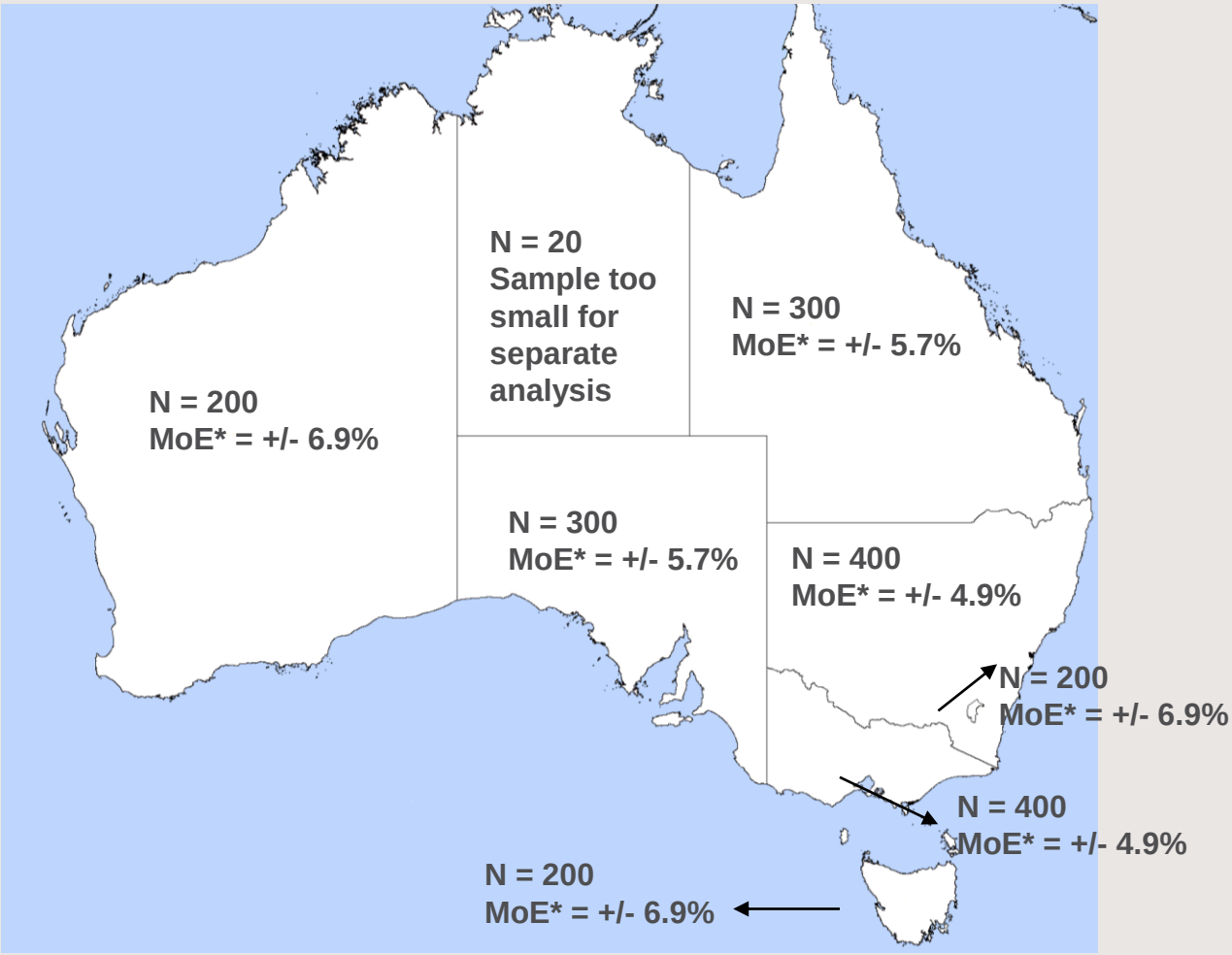
Many questions use 0-10 scales.

- 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'

- This represents the combined result for all household consumers.
- National averages are intended to be indicative only. Because the sample is stratified by state and territory, some states and territories are over-represented (especially Tasmania and ACT) relative to others (especially New South Wales and Victoria), and the overall data has not been corrected for this.

Samples by state and territory



Plus nationwide:

Businesses with under 200 employees

N=280, MOE* = ±5.9%

(MOE = Margin of Error)

Including N=173 with 19 or fewer employees and N=107 with 20 or more employees

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Summary findings

Summary of key findings

There is a relatively high level of overall satisfaction with energy services, which ranges from 64-72% between jurisdictions.

- This remains the case when you drill down to satisfaction with specific issues such as reliability (faults & blackouts 70-82%) and customer service, although there is a lower level of satisfaction with value for money (29-52%) – particularly in Tasmania (29%).
- Satisfaction with value for money for electricity services (29-52%) also lags well behind other services including gas (43-66%), but also internet (43-66%), mobile phones (55-66%) and other services.

There are relatively high levels of confidence in areas such as ability to make decisions (55-69%) and information available to support decision making (46-55%).

- There is also a very large group of neutral consumers – particularly on questions of 'confidence' – who do not express a strong view either way on a large number of questions.

The relatively high level of satisfaction and confidence does not translate into confidence that the market is working in their interests, or that it is likely to improve.

- Depending on the jurisdiction, 20%-39% say the market is working in their long-term interests now and this number is even lower when they are asked whether they have confidence they will see better value for money in the future (14-29%).

There are large variations between states and territories in terms of satisfaction with levels of competition, which aligns with the state of their retail markets.

- Victorian (52%), South Australian (48%) and New South Wales (48%) residents are the most likely to be satisfied with the levels of competition in their areas. These residents are also relatively likely to say the market is working in their interests and / or that it will provide value for money in the long term.
- Tasmanians (16%) are least satisfied with the current level of competition (62% dissatisfied). They are also the least likely to say that the market is working in their interests or that it will provide them value for money in the long term.
- There is some evidence to suggest a correlation between consumers having and exercising choice (switching or investigating their options) in a competitive market and levels of confidence that the market is working in consumers' long term interests, as well as perception they are receiving value for money.

There is a clear relationship between an individual's level of confidence in their own knowledge of the energy market and satisfaction with the market performance.

- Those who feel confident in their own abilities are more likely to be satisfied with the market overall and with the value for money they receive, and to be confident in the long-term outcomes for the market.

Previous behaviour is also a good indicator of future propensity to switch.

- Household consumers who have switched energy providers or plans in the past three years are three times as likely as those who have not even looked at alternatives to say they are likely to switch in the year ahead. The figures for small business are similar.

Consumers who say they considered the environment as a factor in their energy decisions ranges from 48% (Qld) to 65% (WA). Of interest, those with solar panels were only marginally (5%) more likely to say the environment was a factor for them.

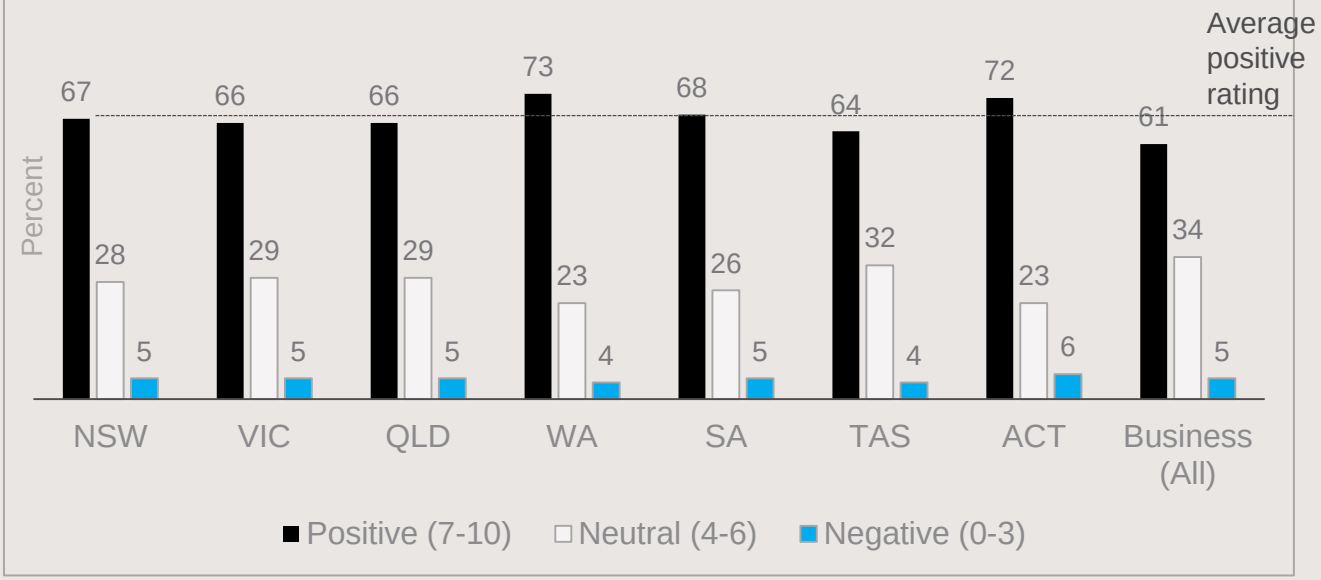
Overall satisfaction

Satisfaction with electricity and gas services is noticeably higher amongst household consumers than amongst small business consumers.

- The numbers of consumers rating their satisfaction as 7 or higher out of 10 ranges from 64% in Tasmania to 73% in Western Australia.
- For small business consumers, their satisfaction rating (7-10) is 61%.
- The proportion of household consumers who are very satisfied (i.e. who give 10 out of 10 ratings) varies from 13% in Western Australia and New South Wales to 6% in Tasmania. 8% of small business consumers are very satisfied.
- These overall satisfaction ratings are therefore reasonably high across the board, and the proportion who say they are highly dissatisfied or not at all satisfied (0-3 out of 10) is consistently in the 4% to 6% range.
- There is also a high neutral response across the board (23-34%)

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

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



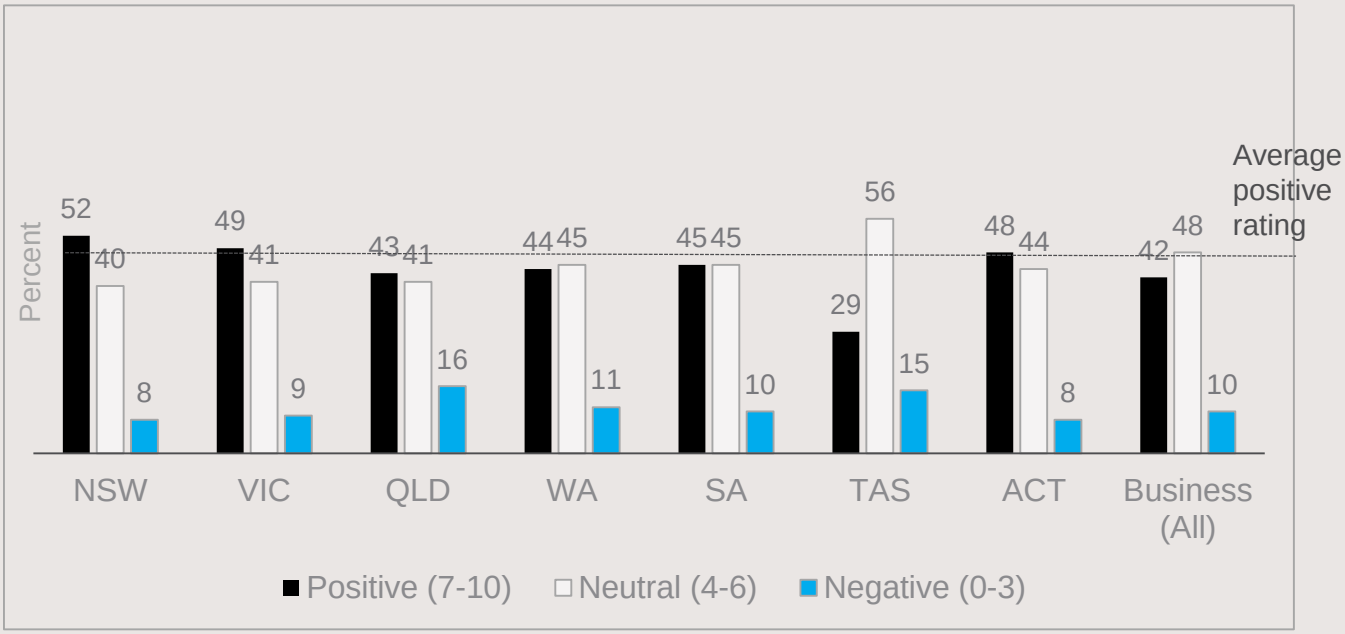
Overall value for money (electricity)

Satisfaction with the overall value for money provided by each individual's electricity company is highest in New South Wales and lowest in Tasmania.

- In New South Wales, 52% of household consumers rated their value for money as 7 or more out of 10, while 8% rated it as 0 to 3.
- In Tasmania, the value for money ratings were 29% satisfied (7 to 10), 15% dissatisfied).
- Satisfaction among small business consumers is relatively low, with 42% giving ratings of 7 or higher.
- Between 40-56% of household consumers nationwide give neutral ratings, as did 48% of small business consumers.

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

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



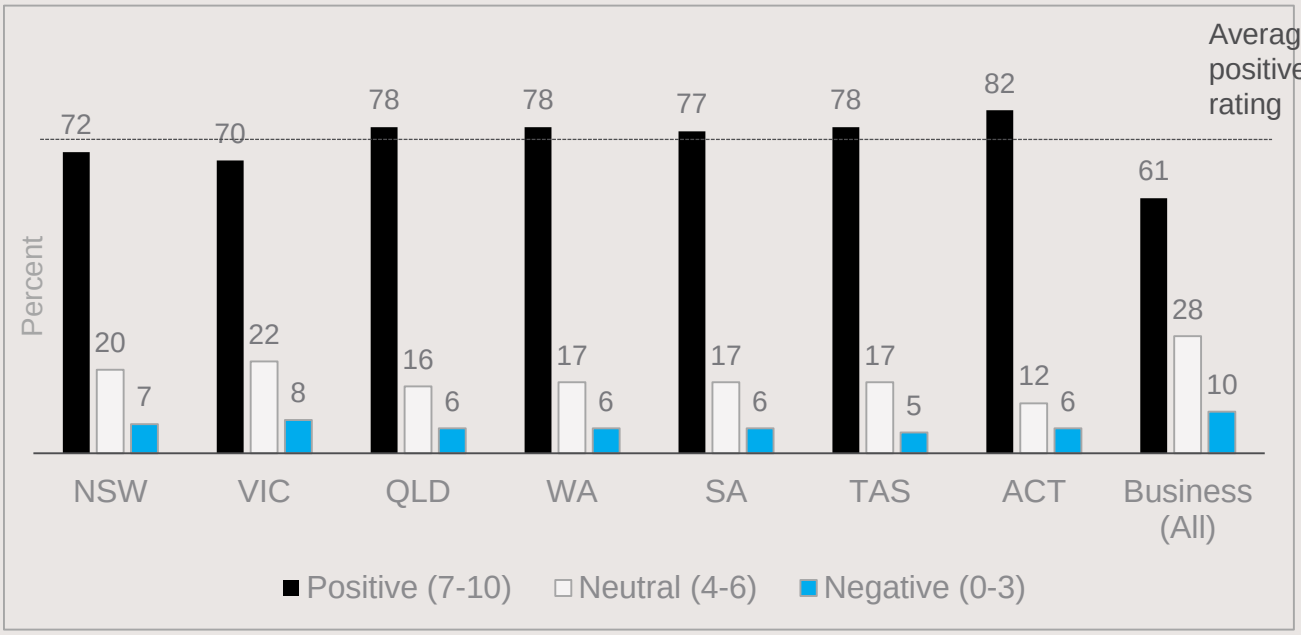
Reliability (electricity)

Satisfaction with the reliability of electricity is considerably lower amongst small business consumers than amongst household consumers.

- Overall, there is a much higher level of satisfaction with levels of reliability.
- 61% of small business consumers are satisfied with the reliability of electricity, compared with household consumer numbers ranging from 70% (Victoria) to 82% (ACT).
- The difference between household and small business consumers on reliability could reflect the reliability of electricity being more important to small business consumers.

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

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



Net Promoter Scores for electricity are weak

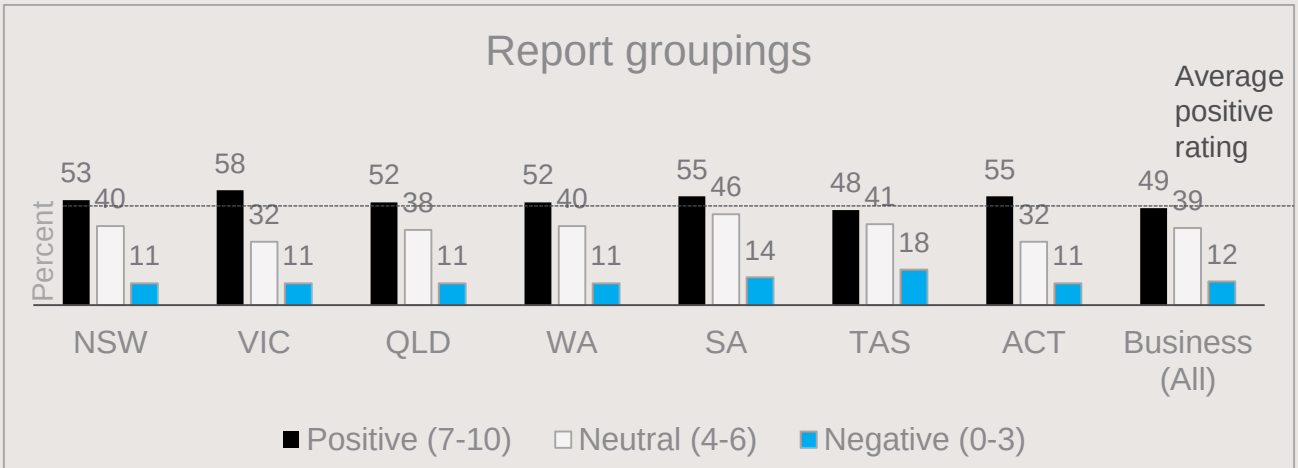
Net Promoter Scores (NPS) are usually reported with the 0-10 scale grouped in a different way from other questions in this report. The charts below present the data with the same 0-3, 4-6 and 7-10 groupings used elsewhere in this report, and the 0-6, 7-8 and 9-10 groupings used in Net Promoter Score analysis.

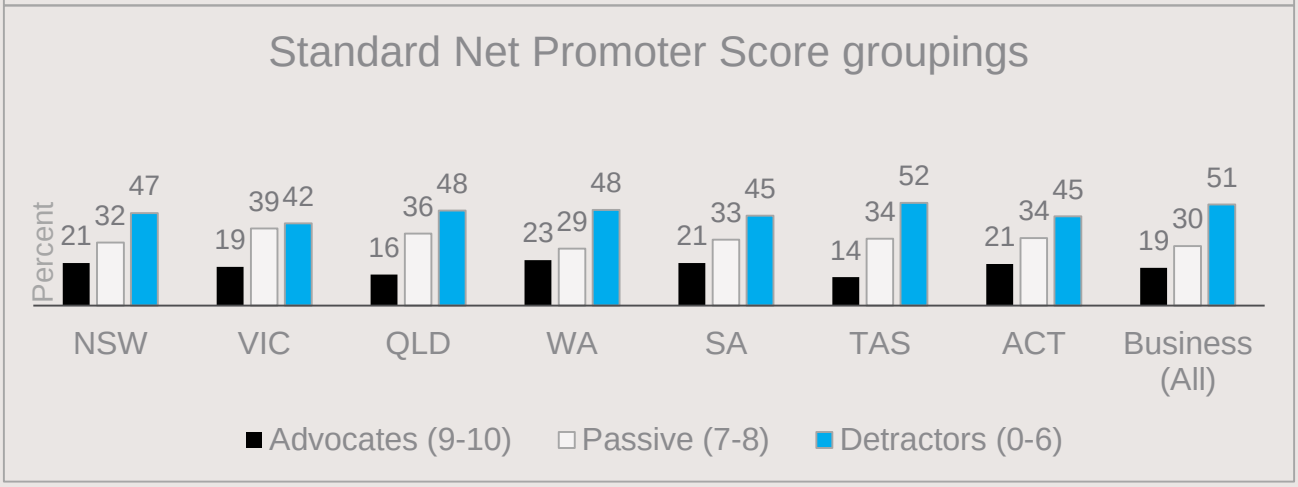
Detractors clearly outnumber advocates in all states and territories, and amongst business respondents.

- The best NPS score (21% advocates, 45% detractors for an NPS of -23%) comes from Victoria, while the worst is in Tasmania (-38%).
- 19% of business respondents are advocates, while 51% are detractors, making for an NPS of -32%.

"How likely is it that you would recommend your current electricity retailer to a friend or colleague?

0-10 scale, 0='very unlikely', 10='very likely'





Net Promoter Scores for gas better than for electricity

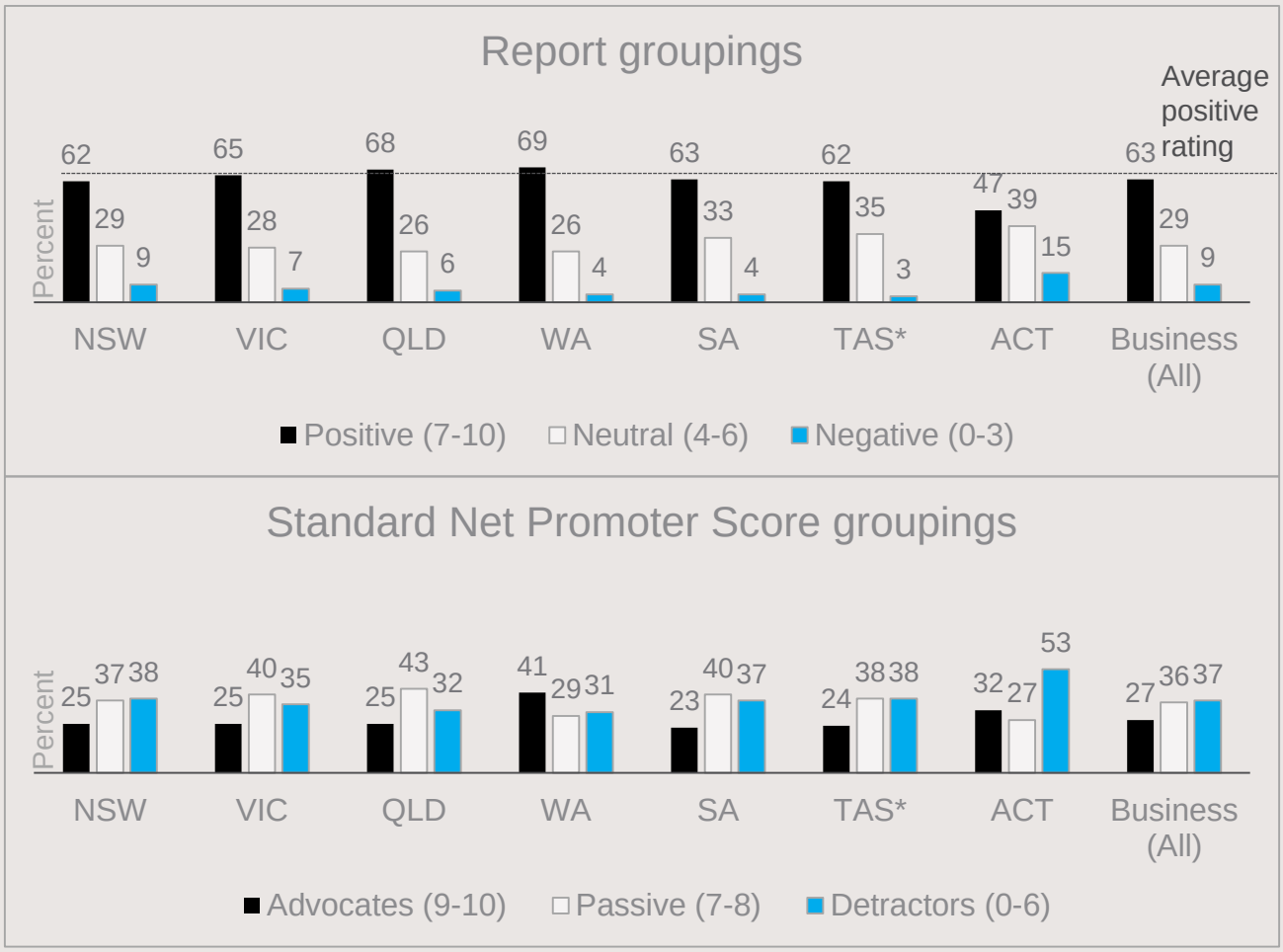
The charts below show the Net Promoter Scores (NPS) for gas, again presenting the data with the same 0-3, 4-6 and 7-10 groupings used elsewhere in this report, and the 0-6, 7-8 and 9-10 groupings used in Net Promoter Score analysis.

Although the NPS is again generally negative, it is better than the NPS for electricity in all states and territories.

- The NPS score for gas in Western Australia is +10% (made up of 41% advocates and 31% detractors), compared with an NPS of -25% for electricity in that state.
- The lowest NPS score for gas comes from the ACT (--21%, made up of 32% advocates and 53% detractors). The NPS in the ACT was -24%.

"How likely is it that you would recommend your current electricity retailer to a friend or colleague?

0-10 scale, 0='very unlikely', 10='very likely'



Base: People who have gas. Tasmanian sample is INDICATIVE ONLY because of a small sample size (n=70)

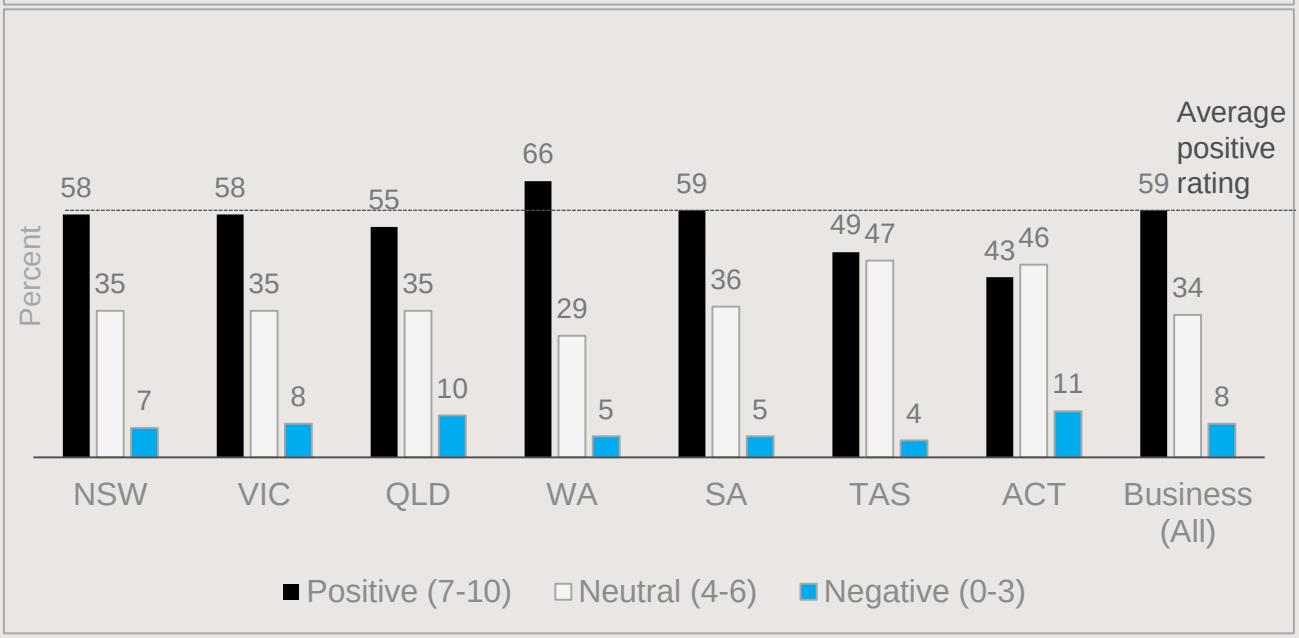
Overall value for money (gas)

Satisfaction levels for gas services are higher than for electricity across the board. For example, on the question of value for money satisfaction was 5-22% higher than for the equivalent question on electricity, in the respective jurisdiction.

- 66% of Western Australia household consumers rate their satisfaction at 7 or more out of 10, compared with 43% of ACT residents.
- Satisfaction among small business consumers is on a par with household consumers, with 59% giving ratings of 7 or higher.

"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'



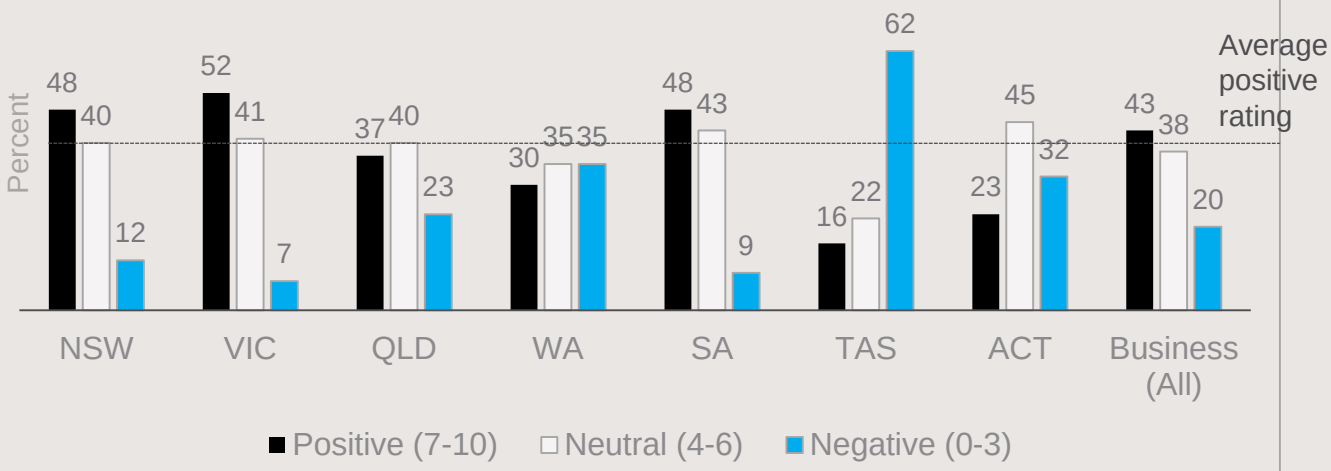
Level of competition

There is considerable variation in satisfaction with levels of competition in jurisdictional energy markets, which roughly aligns with the state of competition in each state.

- Satisfaction is highest in Victoria (52%), followed by New South Wales (48%) and South Australia (48%) which have relatively high levels of competition compared with other jurisdictions.
- Only 16% of Tasmanians and 23% of ACT residents are satisfied, while 62% and 32% are dissatisfied, respectively.
- Even in states with a relatively high level of satisfaction, just 7% of Victorians, 7% of New South Wales residents and 6% of South Australians rate their satisfaction as 10.

"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'



Relatively high levels of confidence in own abilities

Declared levels of confidence in the ability to make choices on energy products and services was fairly consistent across the states and territories.

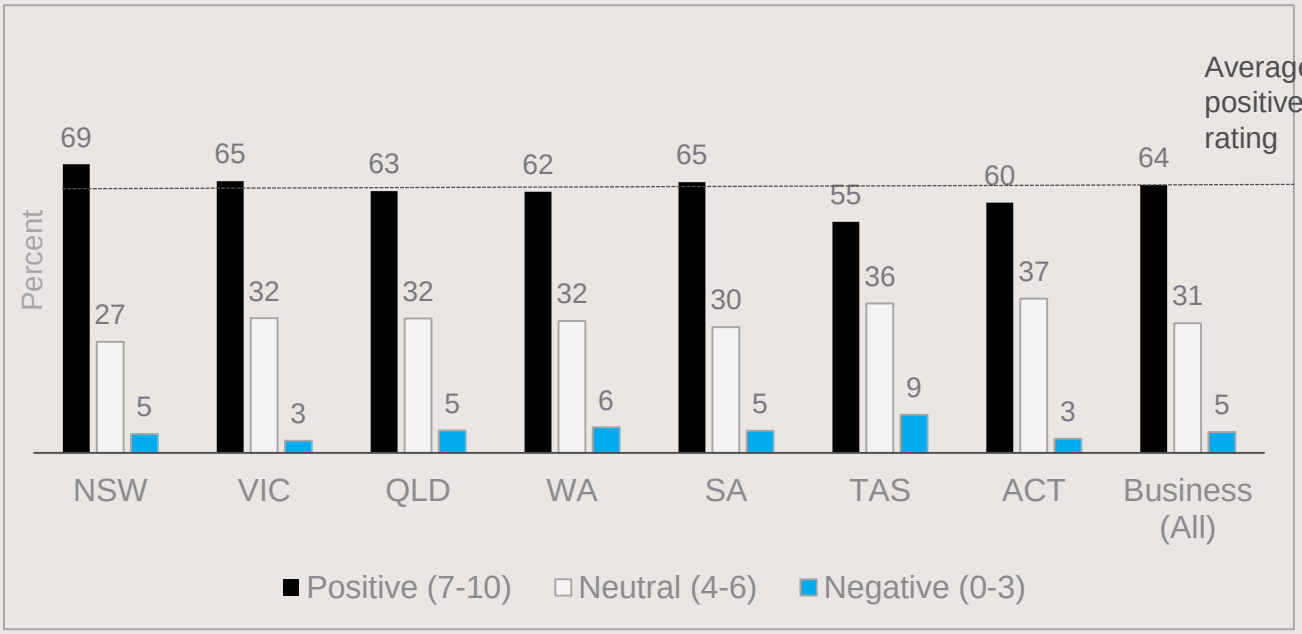
- New South Wales residents were the most likely to say they felt confident (69%), and Tasmanians the least likely (55%).
- It is perhaps surprising that the small business consumers (64%) were no more likely to feel confident than household consumers.

As will be shown in later sections, confidence seems to have an important influence over many other variables in this survey.

- Small business consumers who feel confident, for example, are more likely to feel satisfied with the value for money they currently get, and are also more open to switching providers or plans.
- This may reflect both cause and effect. Feeling confident may make people more comfortable with exploring their options, and exploring the options may help to make people feel more confident.

"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'



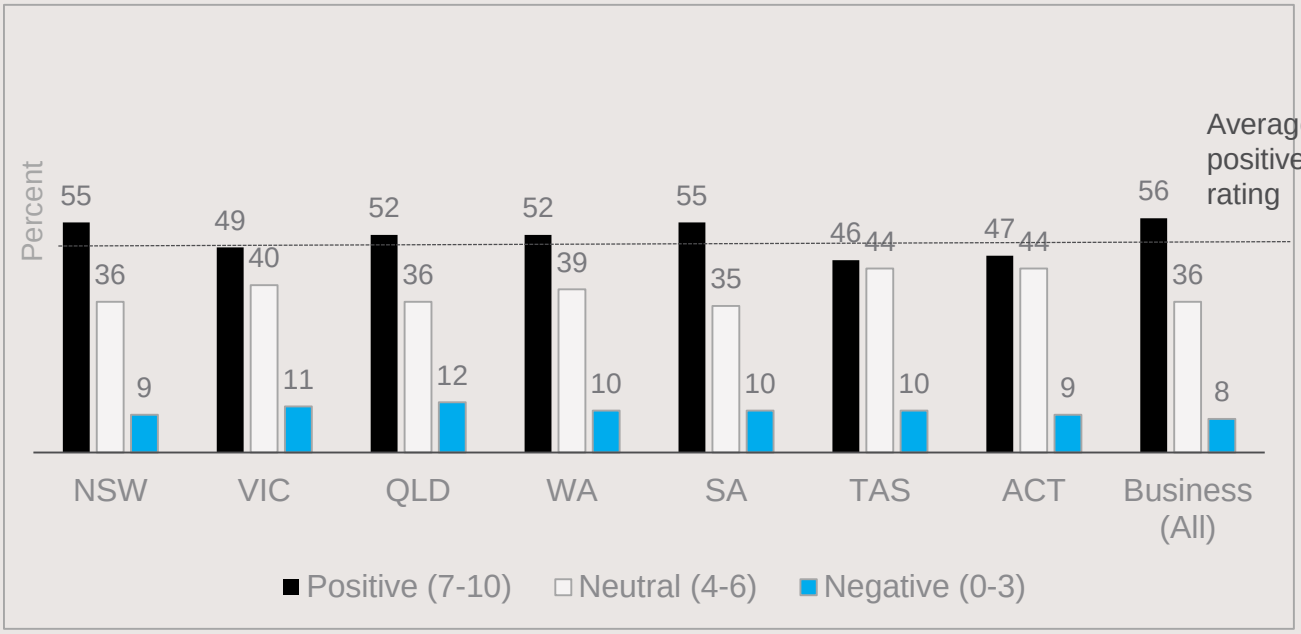
Lower levels of confidence in information than ability to make choices

Around one in two household consumers say they feel confident that there is enough easily understood information available for them to make decisions on energy products and services.

- There is relatively little variation between the states and territories, with the number who rate their confidence in the information as 7 or higher out of 10 ranging from 46% in Tasmania to 55% in South Australia and New South Wales.
- About twice as many consumers lack confidence in information (9-12%), than feel confident in their abilities to make choices. There is a very high neutral rating nationwide (35-44%).
- Small business consumers are a little more confident than the average household consumer.

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

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



Confidence in personal abilities linked with confidence in information

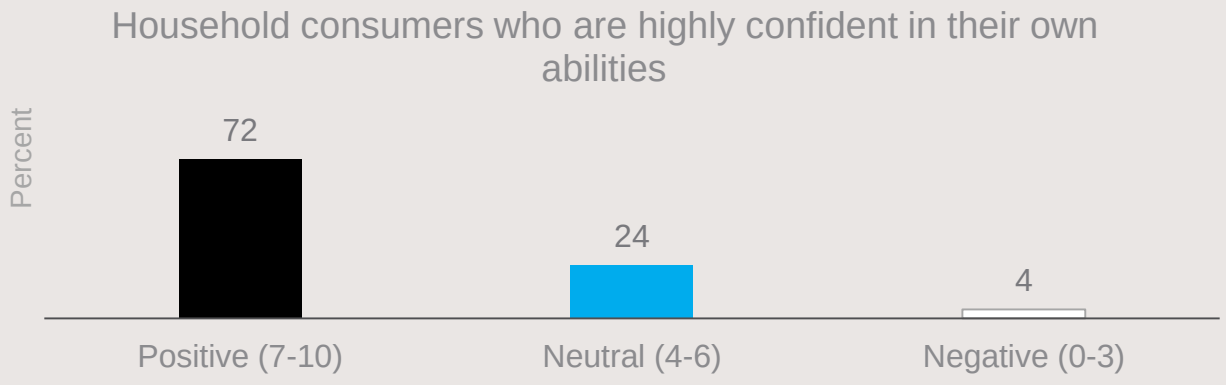
Most people who are confident in their own abilities are also confident that enough information is available.

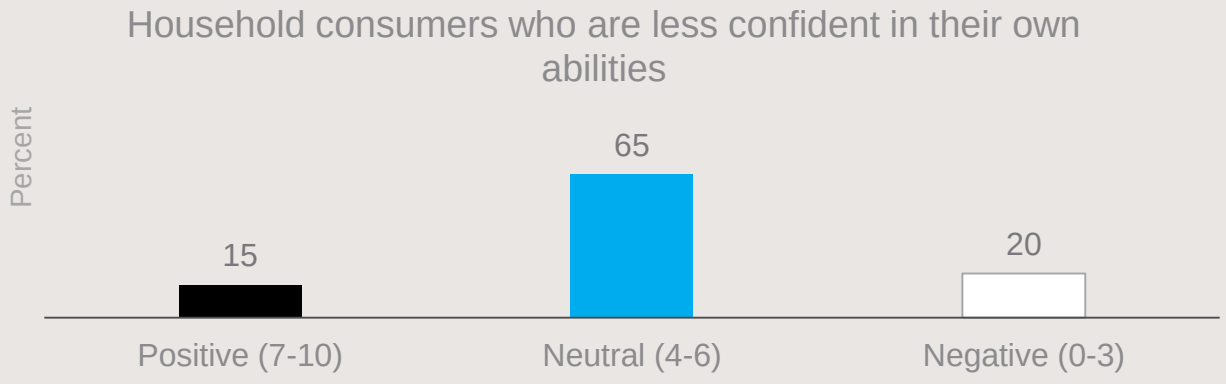
- 72% of those who feel highly confident in their own abilities (7 or higher out of 10) also say that they feel highly confident that there is enough easily understood information available.

Those who are less confident in their own abilities are also less confident in the information.

- Just 15% of those who rate their confidence in their own abilities as 0 to 6 say that they are highly confident that information is available.
- Indeed, of the fairly small sample (n=102) who rate their confidence in their own abilities as 0 to 3 out of 10, 79% also rate the information as 0 to 3 out of 10.

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





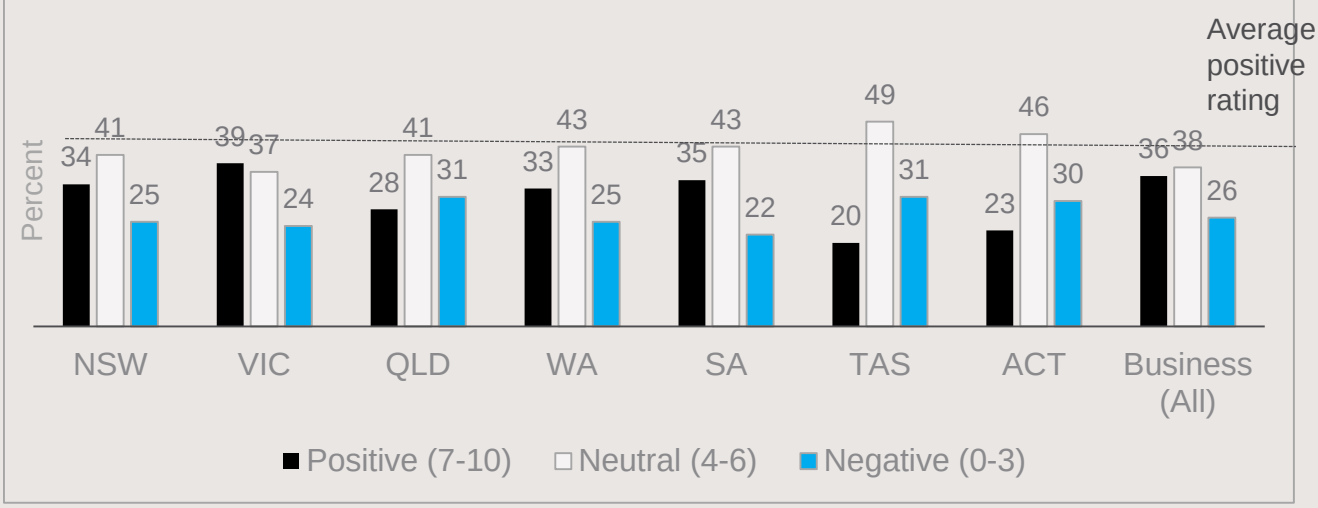
Significant doubt that the market is working in the interest of consumers

Although consumers express relatively high levels of satisfaction and confidence in most areas, this does not translate to confidence that the energy market is working in the long-term interests of people like them.

- Confidence is relatively high in the states where people are also more likely to be satisfied with the levels of competition, but the numbers are still low.
- In Victoria, for example, 39% rate this positive and 24% rate it negatively, while in New South Wales the figures are 34% positive and 25% negative.
- In the least competitive state (Tasmania) those who are satisfied that the market is working in their interest are outnumbered by those who are dissatisfied (20% vs 31%).
- Small business consumers are also relatively likely to rate the level of competition positively and are more confident that the market is working in their interest than households.

"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'



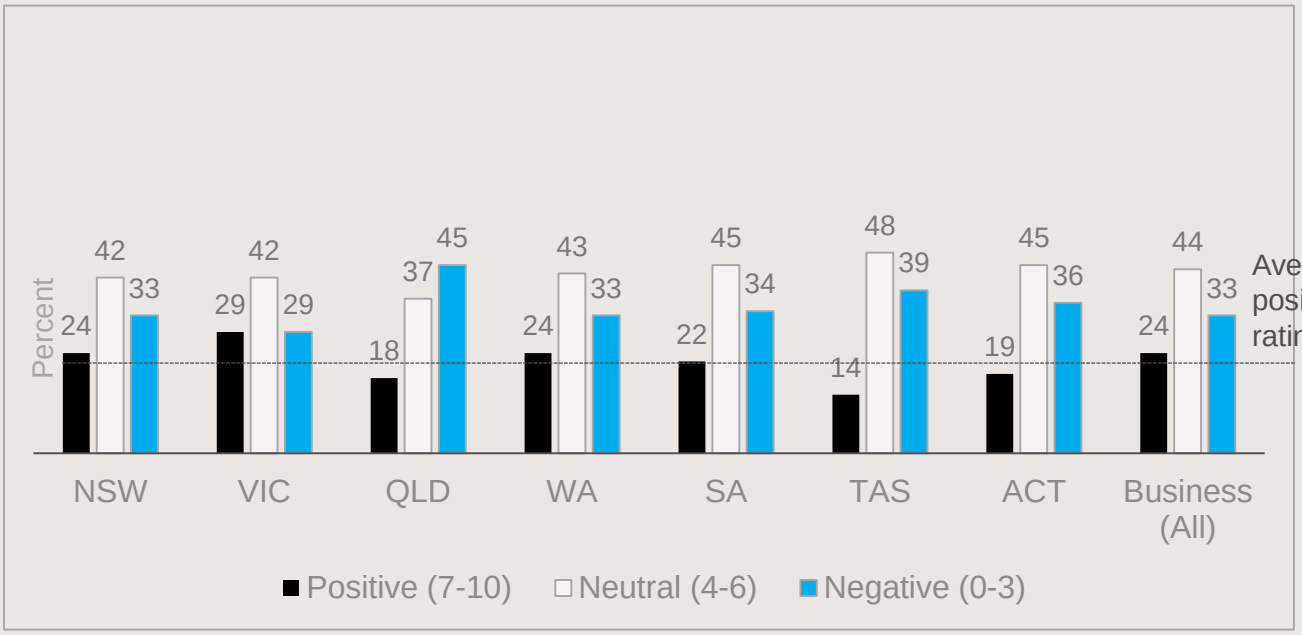
Many do not think that the market will provide better value for money in the future

Following on from the last question, people have a very low expectation that the market will provide better outcomes in the future.

- The best result comes from Victoria, where 29% had positive expectations for value for money, and even in this state the same number 29% had negative expectations.
- The most negative ratings again came from Queensland (18% positive; 45% negative) and Tasmania (14% positive; 39% negative).
- Small business consumers also have a net negative rating (24% positive; 33% negative)

"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'



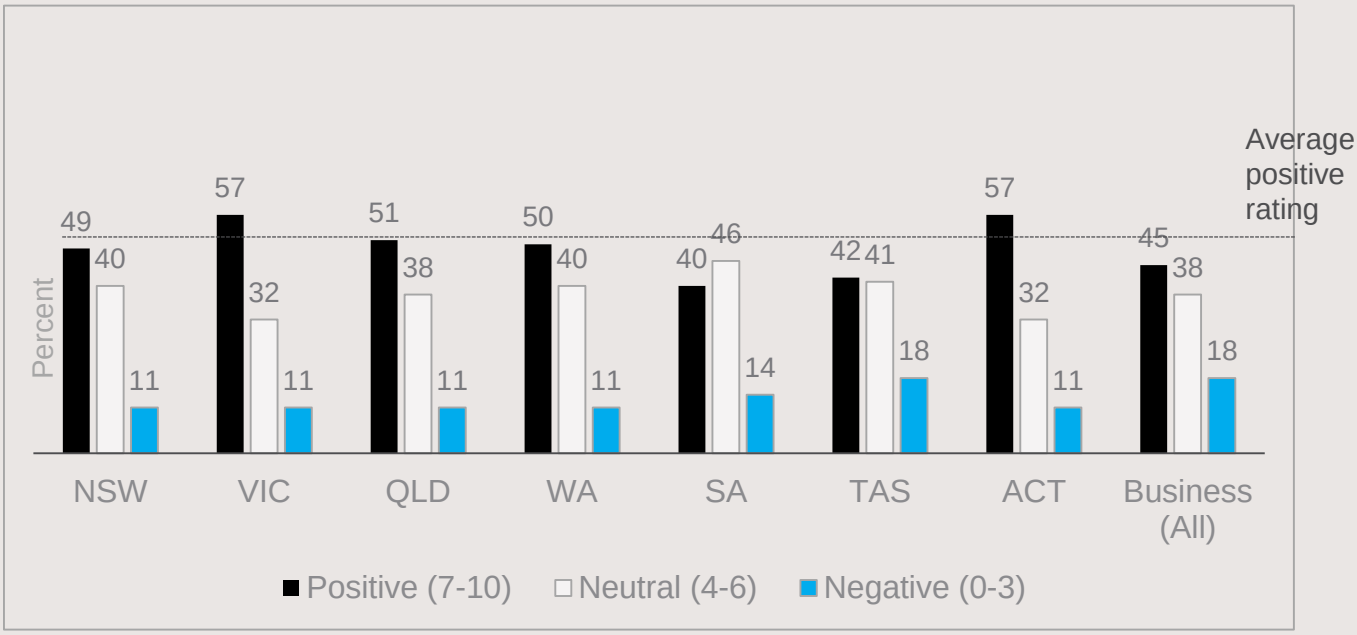
Varied confidence in improved reliability

Household and small business consumers were more confident that the market would deliver better outcomes on reliability than on value for money, but there is considerable variation between the states and territories.

- Victorian and ACT household consumers are the most confident, with 57% rating their confidence as 7 or more out of 10.
- The confidence ratings were clearly lower in South Australia (40%) and Tasmania (42%), possibly reflecting each states' reliability challenges, although many were neutral and the numbers of consumers who were not confident (0-3) were fairly small in all states, including Tasmania (18%) and South Australia (14%).

"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'



High uptake of energy management technologies – but mostly low hanging fruit

Most households already claim to use energy efficient light globes and energy efficient appliances, and many of those who do not already have them say they are considering doing so.

- Western Australians are the most likely to say they use energy efficient light globes (80%), while a further 16% say that they are considering getting them. Just 4% are not considering them at all.
- Queenslanders are the most likely to say they have energy efficient appliances (61%), and a further 26% say they are considering getting them.
- Victorians are the least likely to say they have energy efficient light globes (64%), although 23% say they are considering getting them. 87% of Victorians therefore either have energy efficient light globes or are considering getting them.
- Victorians also bring up the rear on energy efficient appliances (45%), although a good proportion of the remainder (38%) say they are considering getting them.
- Those who own their own homes are slightly more likely to have energy efficient appliances (59%) than those who are renting (41%).

The biggest potential for growth looks to be in rooftop solar panels and solar hot water.

- This research suggest that proportion using solar electricity and/or solar hot water could double in most states and territories.
- The potential is generally greater in states and territories where the penetration is relatively low at the moment (e.g. Victoria, Tasmania and the ACT), but is also substantial in the states where many people are already using it (South Australia, Queensland and Western Australia).
- In Victoria, for example, 17% say they have rooftop solar panels at the moment, and 38% are considering getting panels in the future.
- In South Australia, 32% claim to have rooftop solar panels at the moment, and 36% are considering it for the future.
- The potential for growth among small business consumers is also substantial, with only 16% saying they have rooftop solar panels, but 48% are considering it for the future.

Homeowners are not surprisingly far more likely to have rooftop solar panels.

- 31% of household consumers who own their own homes had rooftop solar, while only 6% of renters had rooftop solar.
- 34% of homeowners say they are considering getting rooftop solar panels at some point in the future, as do 35% of renters.

High uptake of energy management technologies – but mostly low hanging fruit

Although very few consumers have electricity battery storage at the moment, there is solid interest in the technology – especially among those with solar panels

- While for example only 2% of small business consumers have electricity battery storage at the moment, 45% say they are considering getting it.
- Every consumer who said they already had electricity battery storage also had solar panels.
- 36% of those who were currently considering battery storage already had solar panels.
- 53% of those who have solar panels at the moment say that they are considering electricity battery storage.
- 59% of those who were considering getting solar panels were also considering getting battery storage.

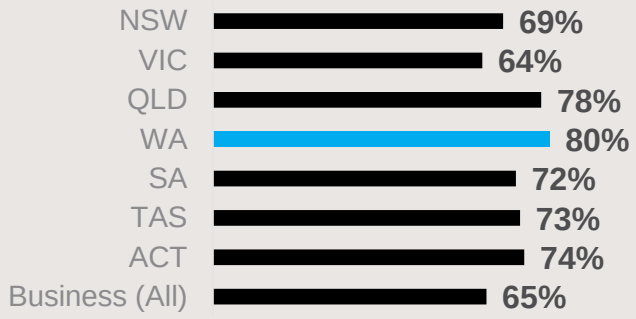
Almost two thirds of Victorians say that they do not have time of use meters, but almost all do so due to the Victorian Government rollout.

- Time of use meters are now been rolled out to all Victorian households, but in this survey only 38% of Victorians recognised that they had one.
- Given that 23% say they want a time of use meter in the future despite actually having one now, the key task here seems to be educating Victorian consumers on the benefit of their existing smart meters.

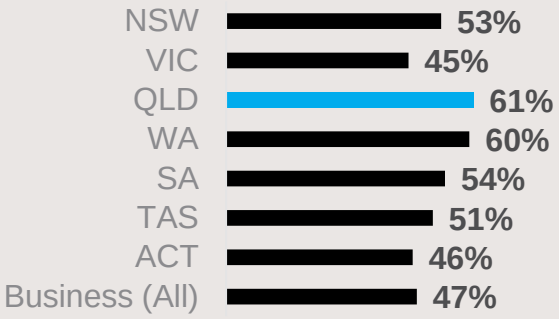
What people have at the moment

Do you already have any of the following technologies to manage the cost of electricity in your household?

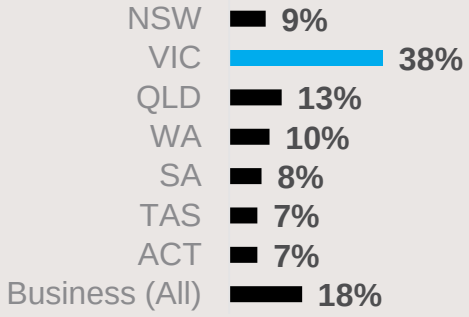
Energy efficient light globes



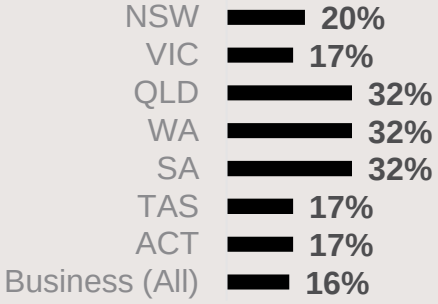
Energy efficient appliances



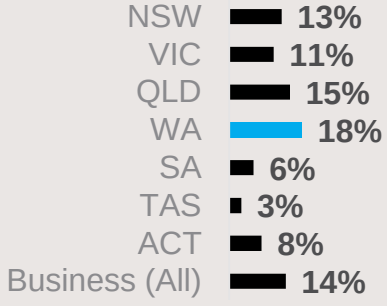
Time of use meter



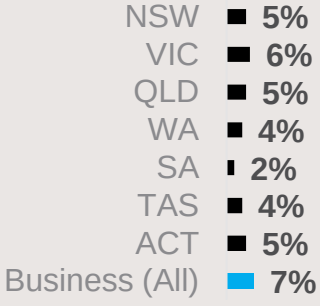
Rooftop solar panels



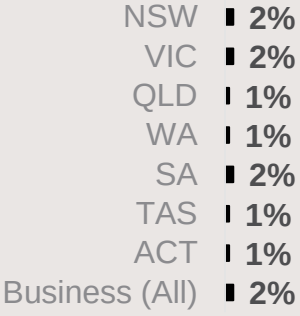
Solar hot water



Smart thermostat



Electricity battery storage



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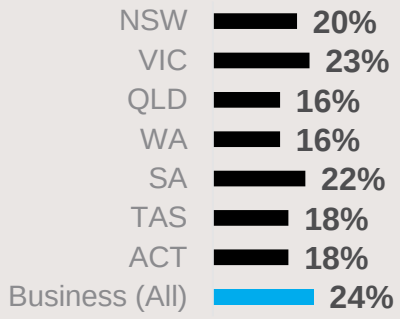
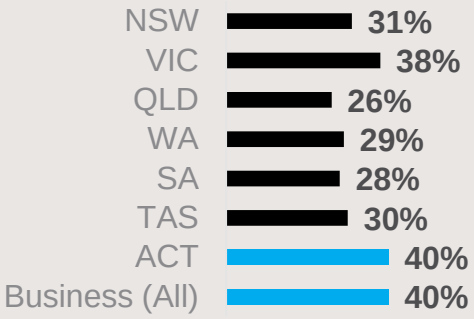
What people intend to get

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

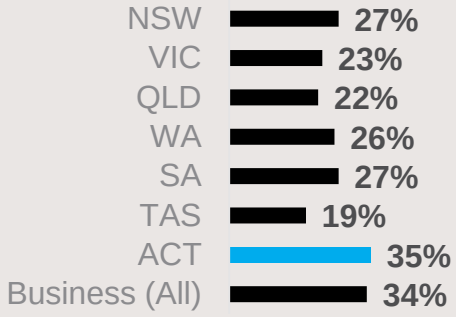
Energy efficient light globes



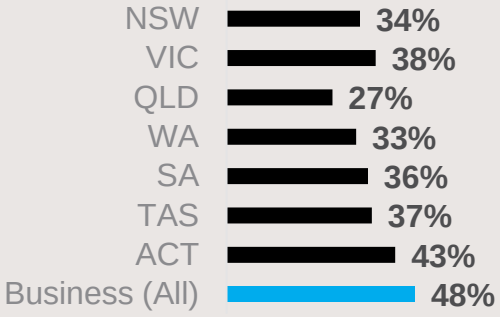
Energy efficient appliances



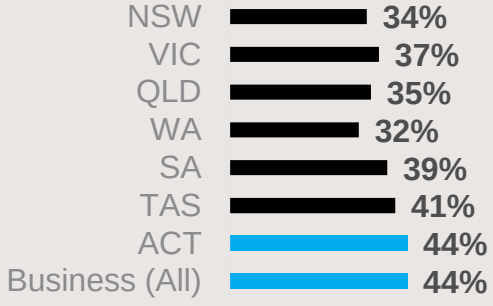
Time of use meter



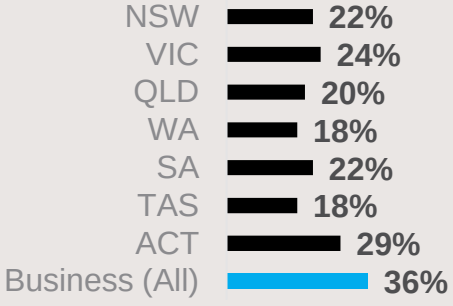
Rooftop solar panels



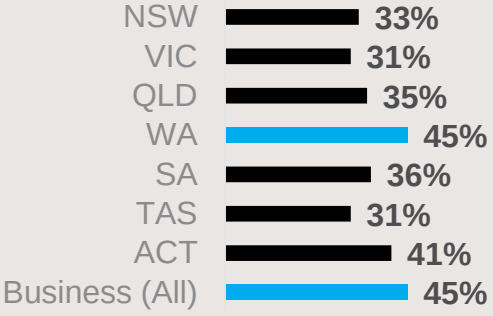
Solar hot water



Smart thermostat



Electricity battery storage



sential. RESEARCH

Reasonable openness to switching

Around six in ten household consumers in New South Wales, Victoria and South Australia have considered switching energy providers or plans in the past three years.

- Of those who looked at switching, around one in three ended up actually doing so.

While there is high levels of variation in past switching behaviour, the intention to switch is similar in most states, with the exception of Tasmania.

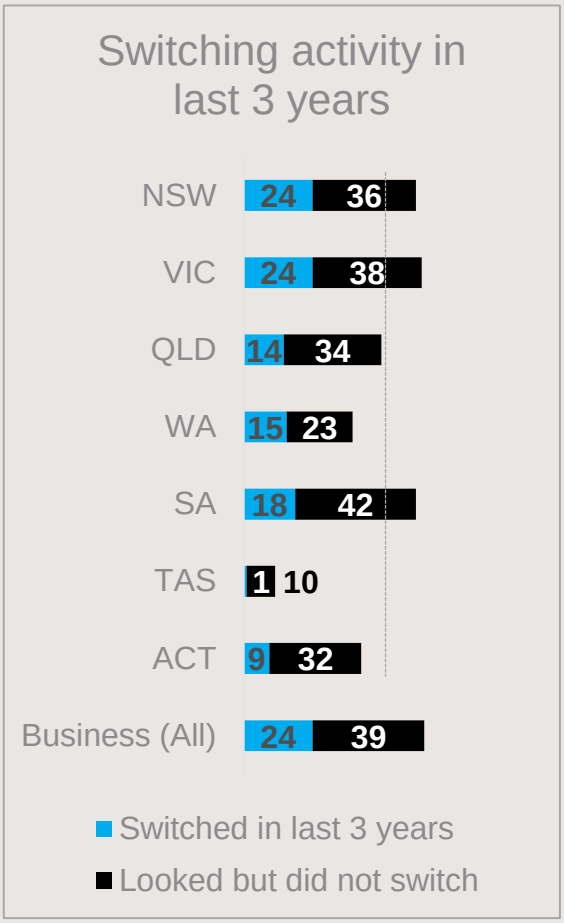
- Tasmania (1%) and ACT (9%) have the lowest levels of past switching; Queensland (14%), Western Australia (15%) and South Australia (18%) have moderate levels of past switching; and Victoria (24%) and New South Wales (24%) have relatively high levels of past switching.
- However, with the exception of Tasmania (10%) there were similar numbers of household consumers who looked to switch (23-42%)

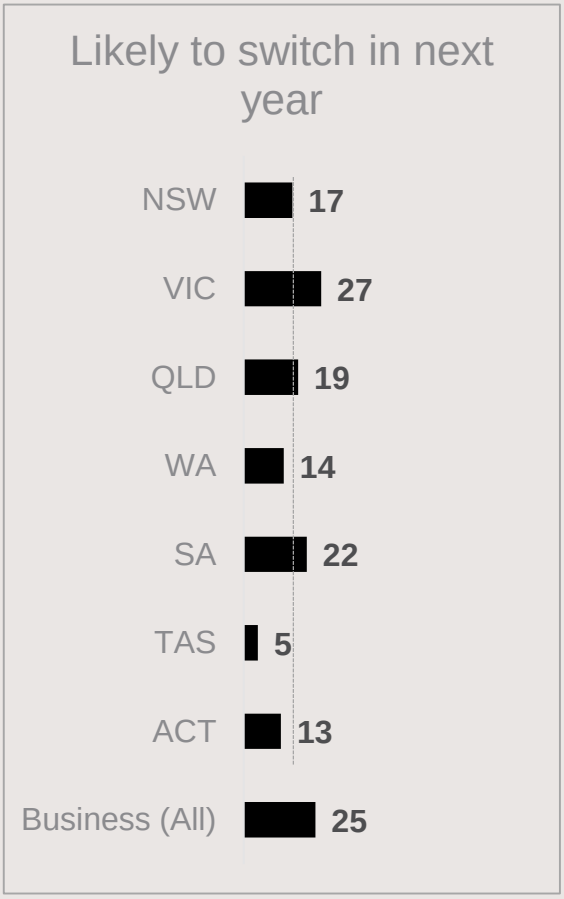
Being unable to change suppliers in Tasmania would have contributed to a lack of interest in changing energy plans.

- Only 11% of Tasmanians had even considered changing plans.

Past behaviour is a reasonable predictor of future behaviour.

- Those who have switched or looked to switch in recent years are more likely to look at switching in future years.
- Although the proportion of Victorians & New South Wales residents who have switched in the past 3 years is the same, Victorians are more likely to switch in the year ahead.
- The proportion saying they are likely to switch in the next year is roughly a third of the proportion who say they either switched or considered switching in the past three years. This suggests the actual number who consider switching in the year ahead will be similar to the number that did so in the past three years.

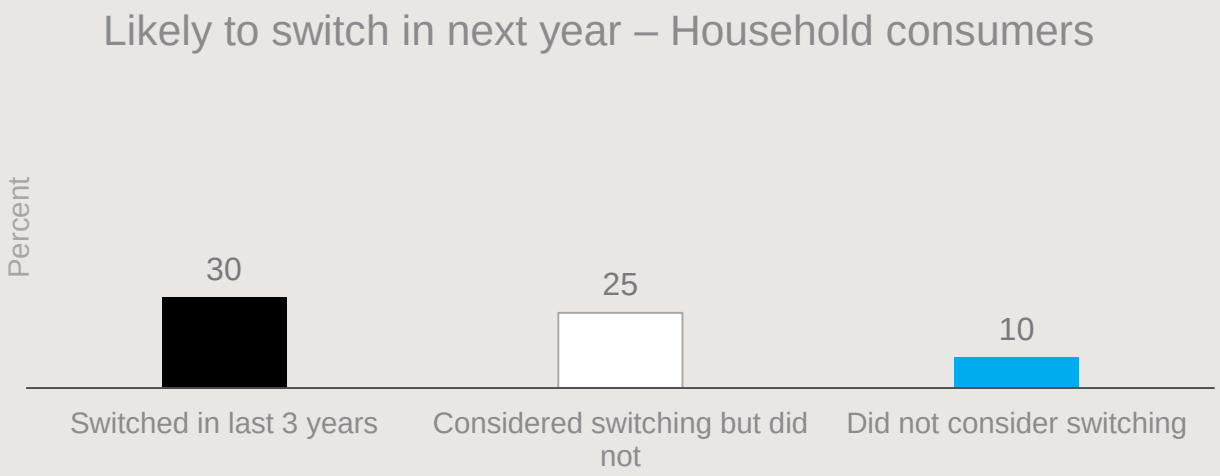


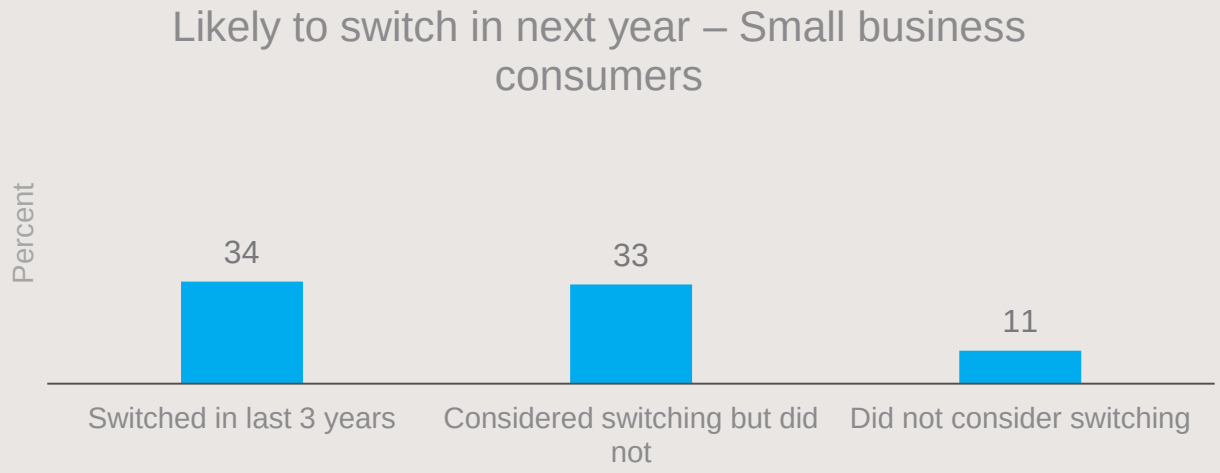


Previous switching predicts future intentions to switch

There is clearly a link between whether people have considered switching in the past, and what they intend to do in the year ahead.

- The correlation is between those have considered switching and those who intend to switch.
- Someone who has at least considered switching is around three times as likely as someone who has not considered switching to say they intend to switch in the year ahead.
- This difference is in part due to the fact that consumers in some states cannot switch even if they wanted to (the sample sizes are too small to allow state-level breakdowns for this), but the differences are big enough that the trend would likely hold true even in states where the market is highly competitive.



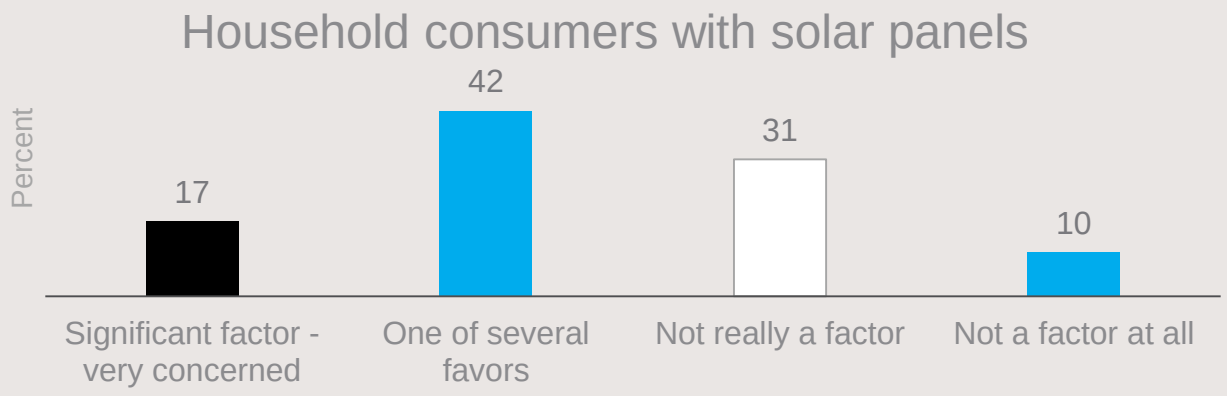


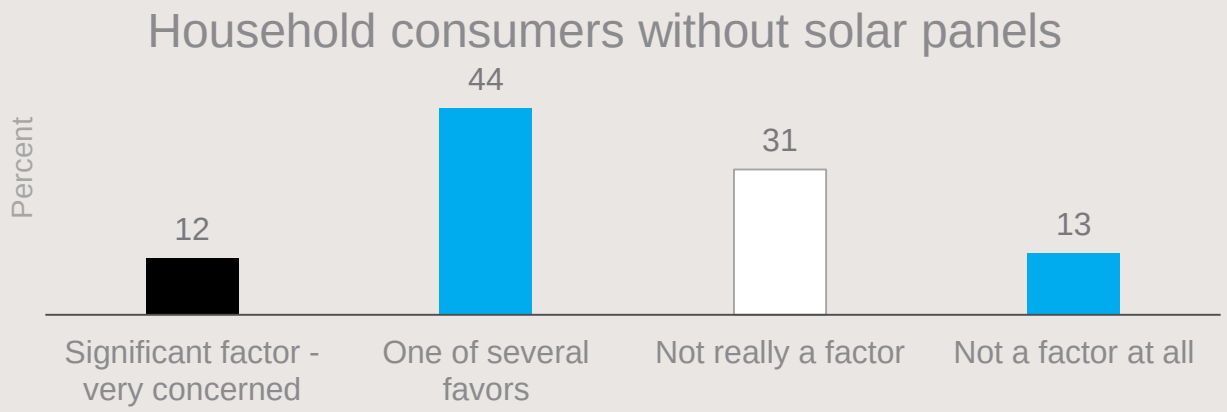
Attitudes to the environment may not have significant impact on energy decisions

Several results in the survey indicate that, even when household consumers say they take the environment into account in their energy decisions, in fact it is secondary to other factors (especially value for money).

- Those who have solar electricity panels, for example, are not substantially more likely to say that the environment is a significant factor in their energy decisions (indicating that they may have chosen solar for other reasons – most likely saving money).
- The number saying that the environment is the most significant factor they consider in energy decisions is highest in Tasmania and the ACT.
- Further research would be needed to explore whether there is a clear relationship between declared attitudes to the environment and actual actions.

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



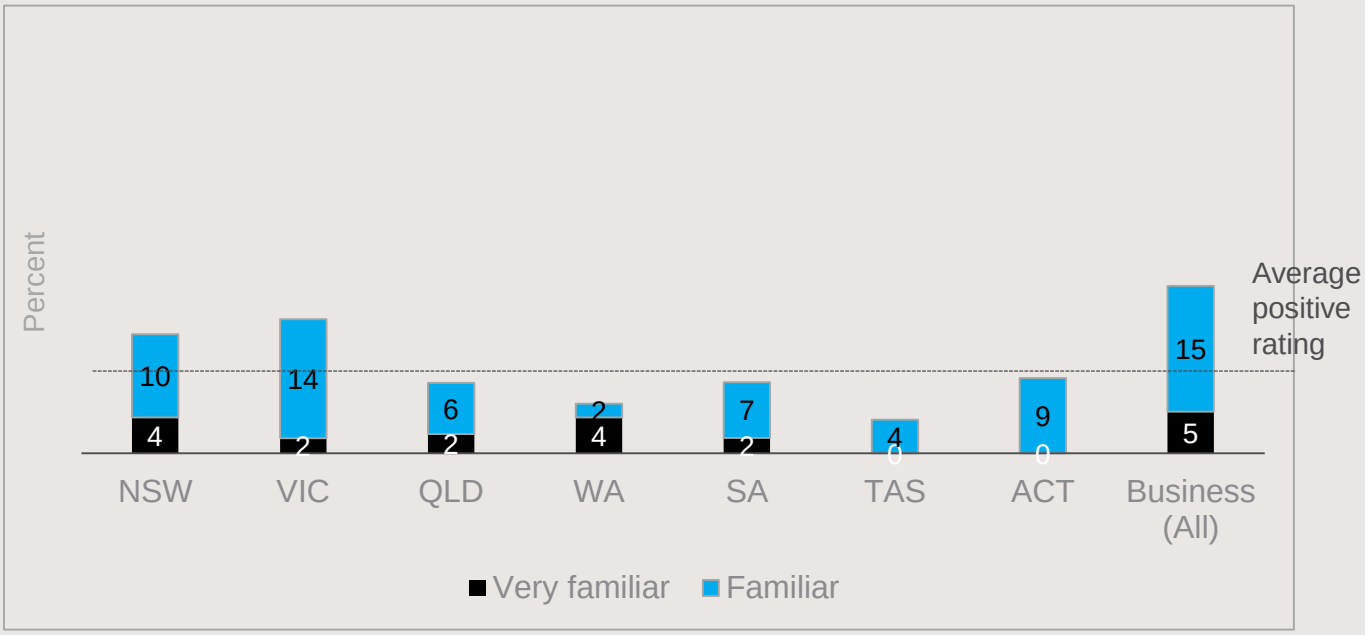


Low awareness of ECA

Very few participants claimed to be familiar with Energy Consumers Australia.

- Awareness of ECA is relatively high in Victoria (16%) and New South Wales (14%).
- Small business respondents are the most likely to say they are aware of ECA (20%).
- Just 4% of Tasmanians claim to be familiar with ECA.
- These results are unsurprising given ECA is a relatively new organisation, but provide a baseline.

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



Essential. RESEARCH

Small business

Overall satisfaction is good, but often tempered.

Small business consumers are reasonably satisfied with the provision of their electricity and gas services.

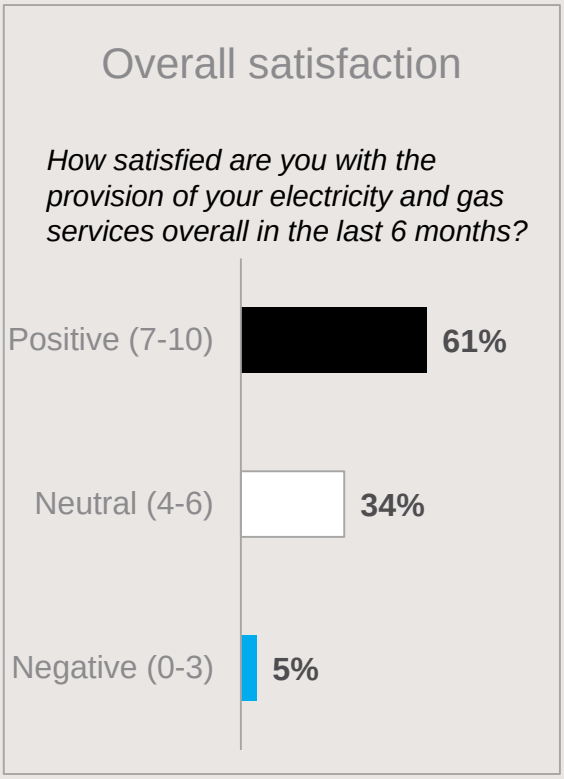
- 61% rate their satisfaction as 7 or higher out of 10, while only 5% rate it as 3 or lower.
- Small business consumers are, however, clearly more likely to rate their satisfaction as '7' or '8' (43%) than as '9' or '10' (18%), indicating that this satisfaction is moderate.

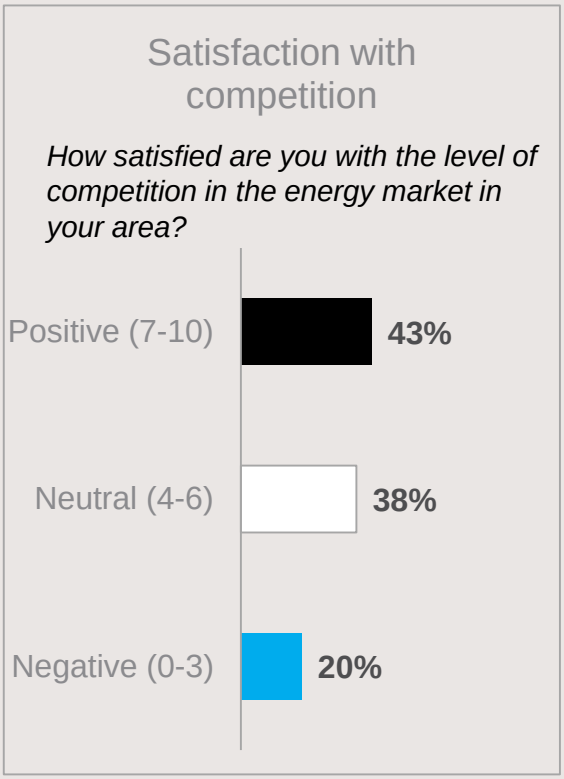
Despite this overall satisfaction, small business consumers are not particularly confident about the levels of competition in their local areas.

- Although 43% are positive, 20% give negative ratings.
- These figures are on a par with the national average for household consumers.
- 39% of small business consumers with 19 or fewer employees are satisfied with the level of competition, compared with 48% of those with 20 or more employees.

Confidence in personal knowledge of the energy market seems to have an important influence on both overall satisfaction and satisfaction with the level of competition.

- 75% of those who feel highly confident about their own abilities, say they are satisfied with their electricity and gas services, compared with only 37% of those who feel less confident in their own abilities.
- 56% of those who feel highly confident are satisfied with the level of competition, compared with 19% of those who feel less confident.
- For the purposes of this analysis, 'highly confident' is those who rate their personal confidence as 7 or higher out of 10, with 0-6 described as 'less confident'.





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Electricity - small business consumers have relatively low levels of sentiment

Small business consumers are less satisfied than household consumers with the value for money they get for electricity, and are also more negative about both reliability and faults.

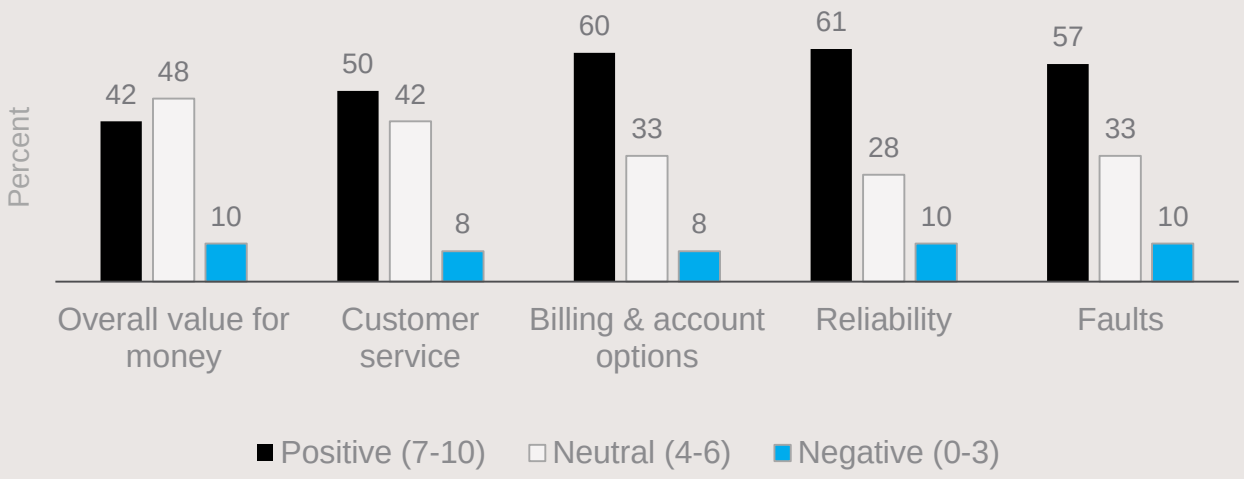
- 42% of small business consumers are happy with the overall value for money they get for electricity, compared with 46% of household consumers.
- 61% are satisfied with the reliability (75% of household consumers)
- 57% are happy with the time it took to resolve faults (64% of household consumers)

The Net Promoter Score for business consumers is -32%

- This is made up of 19% advocates and 51% detractors.

"How would you rate the [attribute]"

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



Ratings for gas retailers are better

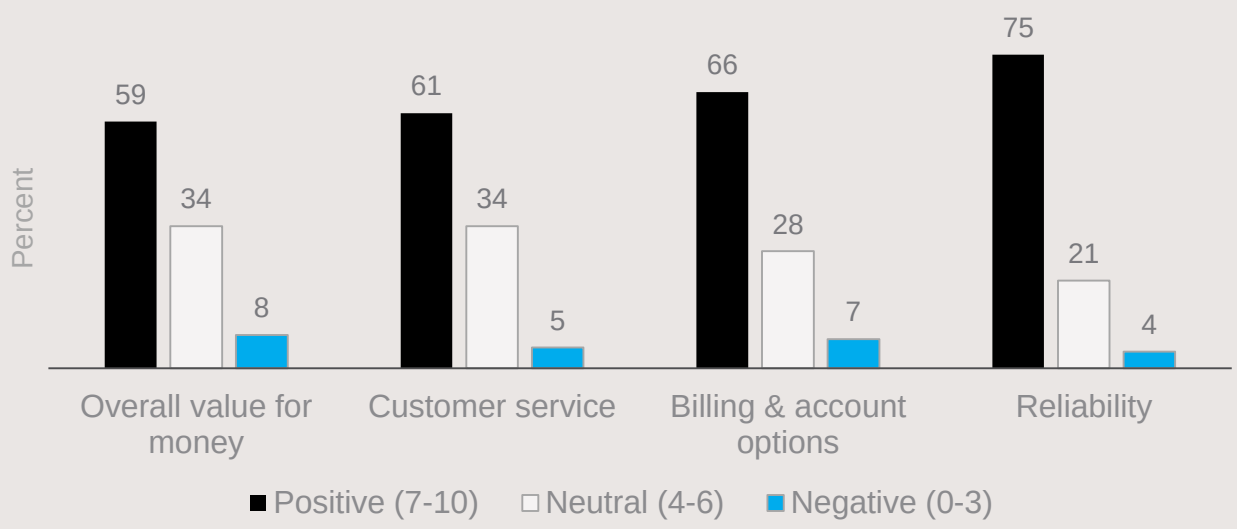
Small business consumers consistently gave better ratings for gas than they did for electricity.

- 59% are happy with the value for money they get for gas, compared with 42% for electricity.
- 75% are satisfied with the reliability of gas services (61% for electricity).

Ratings of gas retailers from small business consumers are about the same as ratings from household consumers.

"How would you rate the [attribute]"

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



Base: Small business consumers with gas (n=199)

Electricity lags well behind other services on value for money

Business consumers' rate electricity well behind other services, including gas.

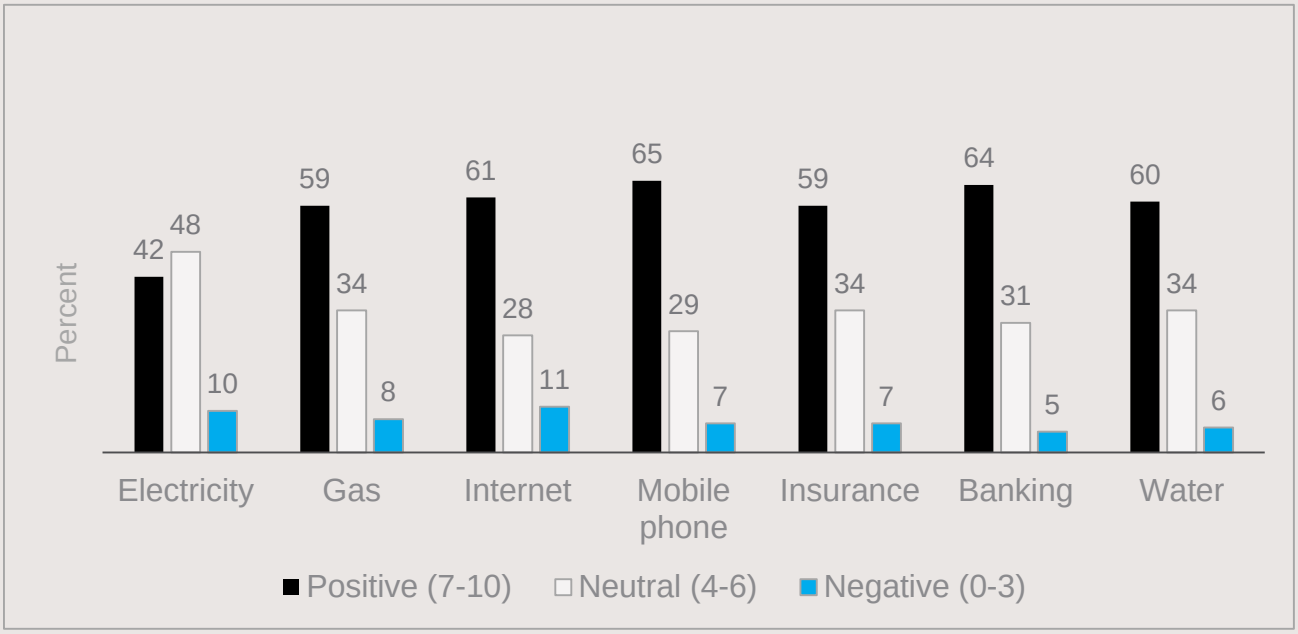
- The proportion of small business consumers who are happy with the value for money they get for electricity is 42%, compared with 65% mobile phone services, and 64% for banking services.

The difference mainly comes from small business consumers with 19 or fewer employees.

- 35% of those with 19 or fewer employees say they are satisfied with the value for money of their electricity, compared with 52% of those with 20 or more employees.
- For internet, mobile, insurance, banking, water and gas services, small business consumers with 19 or fewer employees report about the same levels of satisfaction with value for money as those with 20 or more employees. 65% of those with 19 or fewer employees are satisfied with their banking services, as are 61% of those with 20 or more employees.

"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'



Small business consumers are confident in their own abilities, but not in the market

Most small business consumers are confident in their personal ability to make choices about energy products and services.

- 64% rate their confidence as 7 or more out of 10, while only 5% give it 0 to 3.
- They are also comfortable that they will be able to find easy-to-understand information and tools (56%), and that they will be able to get their problem solved (56%).

Many do not, however, believe that the market is working in their long-term interests.

- 36% say the market is working in their long term interests, 26% believe it is not, and 38% give neutral ratings.

There is a relationship between personal confidence and confidence in the market.

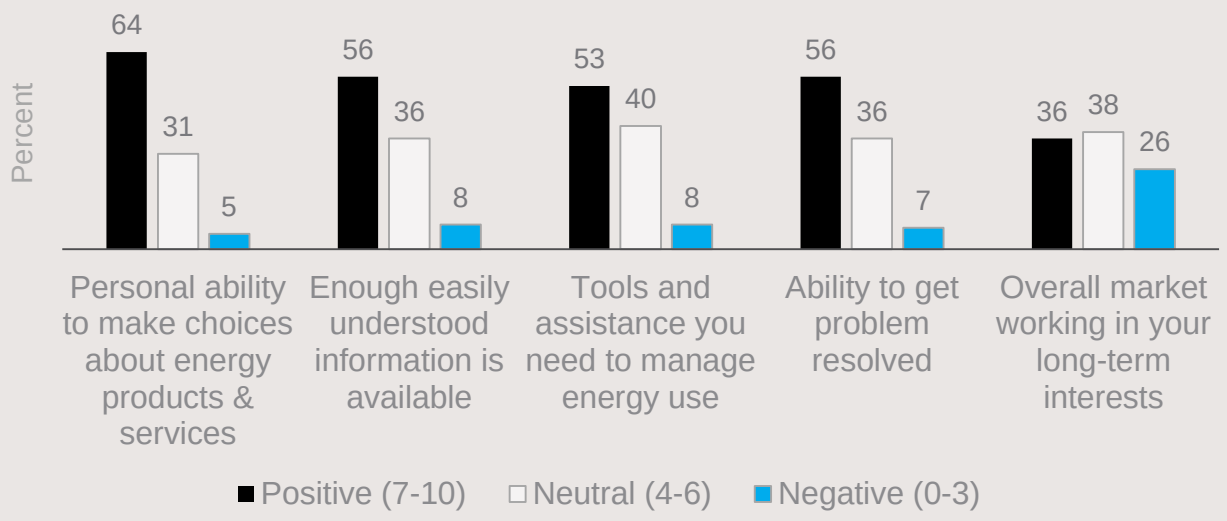
- 51% of those who feel highly confident in their own abilities (7 or higher out of 10) also say that they feel confident that the market is working in their long-term interests.
- Just 9% of those who feel less confident in their own abilities (6 or lower out of 10) say that they feel confident that the market is working in their long-term interests.

Smaller business consumers are also less confident that the market is working in their long-term interests.

- 28% of those with 19 or fewer employees say they are confident in the market, compared with 48% of those with 20 or more employees.

How would you rate the [attribute]

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



Little confidence in long-term value for money

Small business consumers are uncertain about market outcomes in areas like reliability, service and technology.

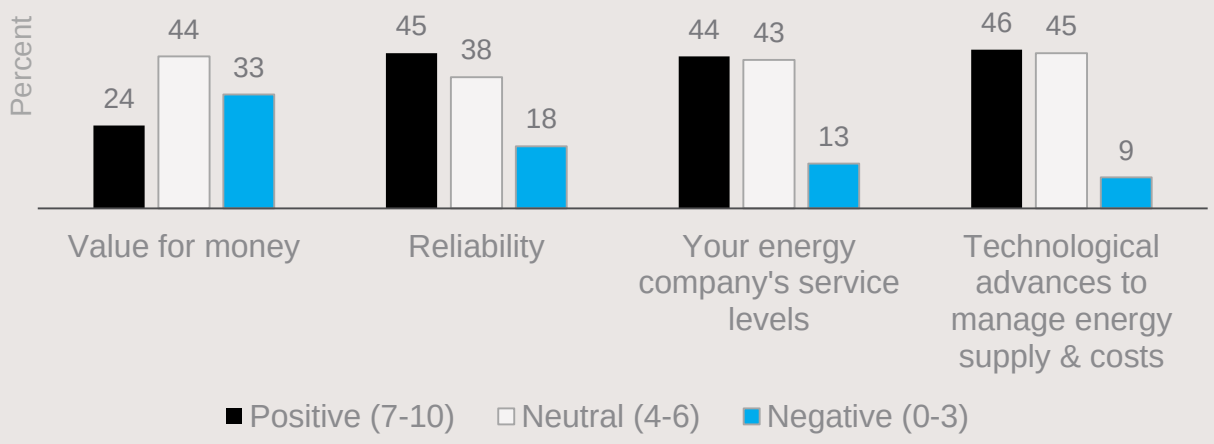
- 45% say that they are confident that the market will provide better outcomes in terms of reliability, for example. Only 7% say that they are very confident (i.e. rate their confidence as 10 out of 10), however, and 38% give neutral ratings.

A third of small business consumers, however, say that they are not confident that the market will deliver them better value for money – particularly businesses with less than 20 employees.

- 42% of those with 19 or fewer employees believe that this is the case, compared with 19% of those with 20 or more employees.

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'

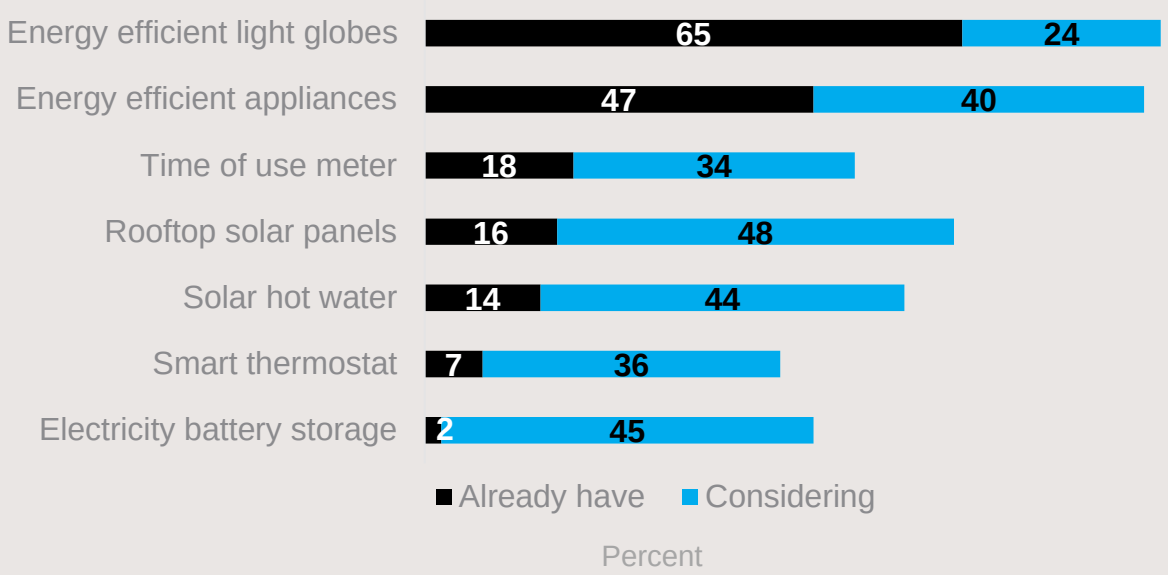


Clear potential for growing new technologies

Small business consumers are open to using most of the technologies tested in the survey.

- There looks to be potential to expand the use of rooftop solar panels and solar hot water, with the numbers claiming to be considering these technologies being around triple the numbers who use them at the moment.
- Given that just 2% use battery storage at the moment, the fact that 45% say that they would consider batteries indicates considerable potential for growth.

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



Small business consumers are relatively open to switching

Almost two thirds of small business consumers report considering switching energy companies or plans in the past three years

- 24% say that they actually switched, while 39% looked at doing so but did not.

One in four intend to switch in the year ahead.

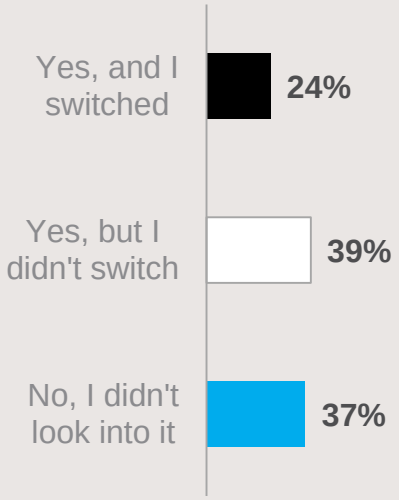
- This compares with 18% of household consumers.

Previous switching behaviour is a good indicator of future intentions.

- 34% of small business consumers who switched in the past 3 years say they intend to switch in the year ahead, as do 33% of those who looked at switching but did not.
- Only 11% of those who did not look into switching say that they intend to do so in the year ahead.
- This also indicates the key divide is whether or not people consider switching, not whether or not they actually follow through.

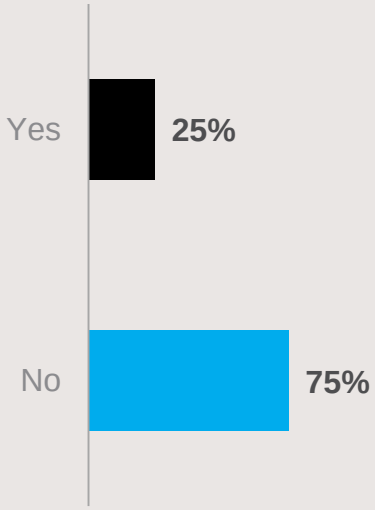
Previous behaviour

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



Future intentions

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



Value for money key motivation for considering switching

Value for money dominates the reasons for small business consumers looking at their options.

- 45% said that they considered switching because they did not believe they were getting value for money from their current provider.
- 28% were comfortable with their current provider but believed they could get a better deal (i.e. better value for money) elsewhere.
- Value for money therefore comes in well ahead of dissatisfaction with customer service, faults or other aspects.

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

Base: Small business consumers who considered switching in the last 3 years (n=177)

Barriers to switching are diverse

Although the most common reason given for not looking at switching is satisfaction with the current deal, many others did not switch because they saw it as difficult.

- 18% said that they had not looked at switching because there were no alternatives available (including people from states and territories where there was actually no alternative)
- 12% said that it would be too time consuming, 6% thought that it would be too difficult, and 5% believed that the information was too difficult to understand.
- 8% said that switching would make no difference, and another 4% were concerned that they would end up worse off.

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

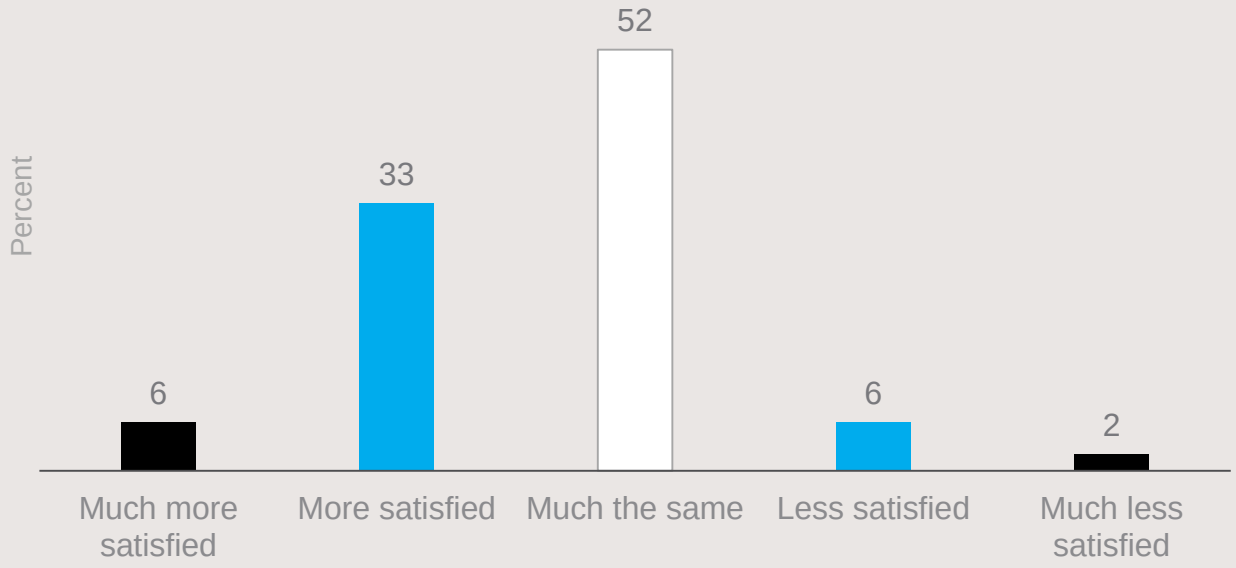
Base: Small business consumers who had not considered switching in the last 3 years (n=103)

Exploring options makes some people more satisfied

39% of those who looked at options for switching energy companies or plans say that they are now more satisfied with the value for money they receive.

- Only 8% say that they are less satisfied with the value for money after looking at switching. This suggests that those who found better value for money elsewhere were able to switch – i.e. that any barriers they did face to switching were not sufficient enough to prevent them doing it.
- 51% of those with 20 or more employees who considered switching say they are more satisfied with the value for money they receive, compared with only 33% of those with 19 or fewer employees who considered switching. This may suggest that the larger companies were offered better deals, or that any barriers to switching were greater for the smaller companies.

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



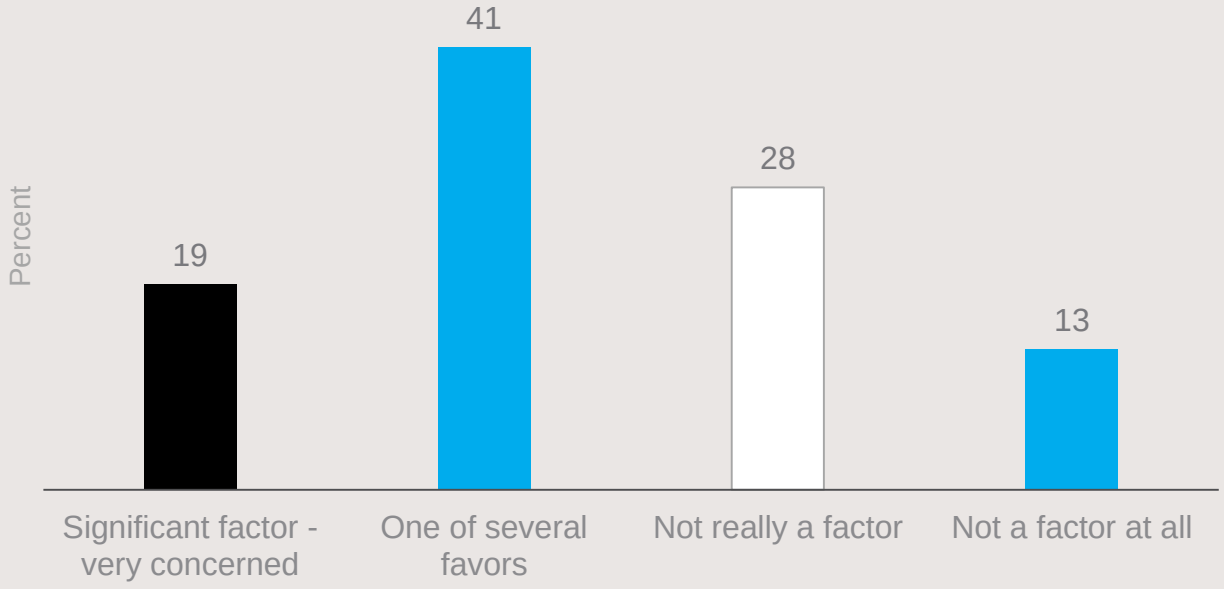
Base: Small business consumers who considered switching in the last 3 years (n=177)

Environment is one of a number of factors considered

60% of small business consumers say that the environment is a factor they consider when making decisions about energy products and services, but only 19% say it is a significant factor.

- 71% of those with 20 or more employees say that the environment is a factor they consider, compared with 53% of those with 19 or fewer employees.

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

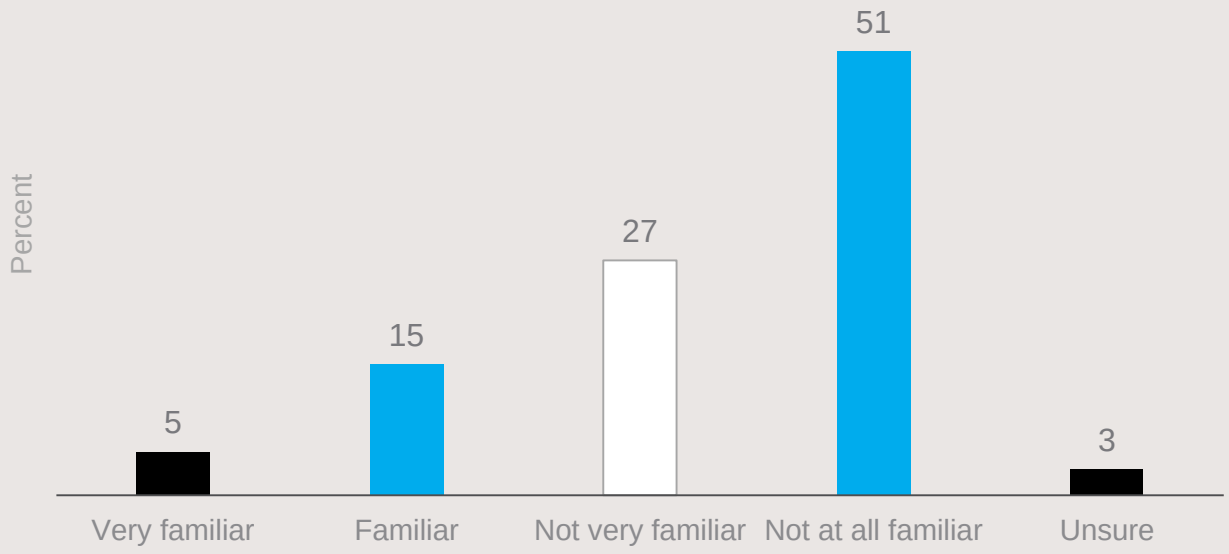


Awareness of ECA is low

20% of small business consumers claim to be familiar with ECA.

- Although awareness is low, it is still clearly higher amongst small business consumers than it is amongst household consumers, where the numbers claiming to be familiar with ECA range from 16% in Victoria to 4% in Tasmania.

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



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New South Wales

New South Wales relatively satisfied with levels of competition

Overall satisfaction in New South Wales is only average.

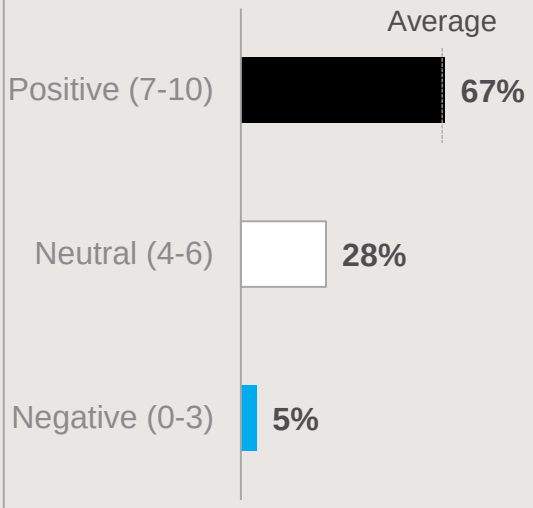
- 67% are satisfied with their electricity and gas services overall, behind Western Australia (73%) but ahead of Tasmania (64%).

The state has, however, the equal second highest number who are satisfied with the level of competition in their area.

- 48% say they are satisfied, behind Victoria (52%) and equal with South Australia.

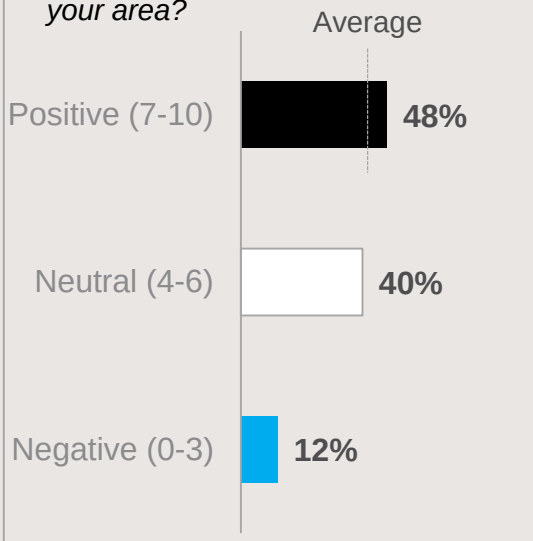
Overall satisfaction

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



Satisfaction with competition

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



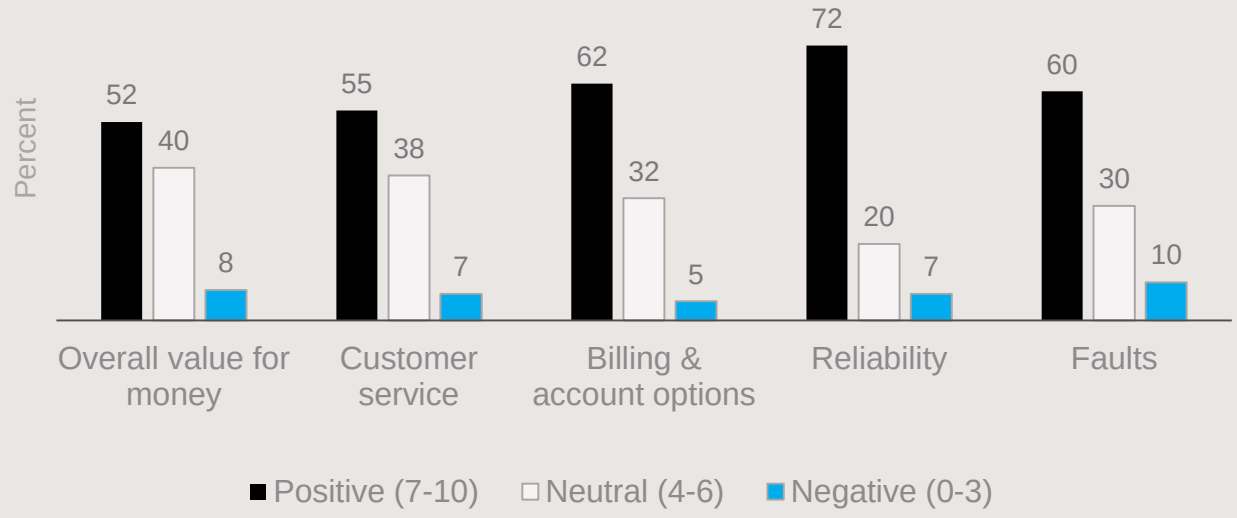
Strong on value for money, but lower on faults

New South Wales household consumers give the highest ratings for satisfaction with the value for money of electricity, but are below other states and territories in some other areas.

- 52% say they are satisfied with the value for money of electricity. This is 3% more than in the next highest state (Victoria).
- 60% are satisfied with the way faults were dealt with, the equal lowest of all the states and territories. The highest is Western Australia (72%).
- 72% are satisfied with the reliability of supply, which is a reasonable number but behind ACT on 82%.
- NSW has a net promoter score of -26%, consisting of 21% advocates and 47% detractors.

"How would you rate the [attribute]"

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



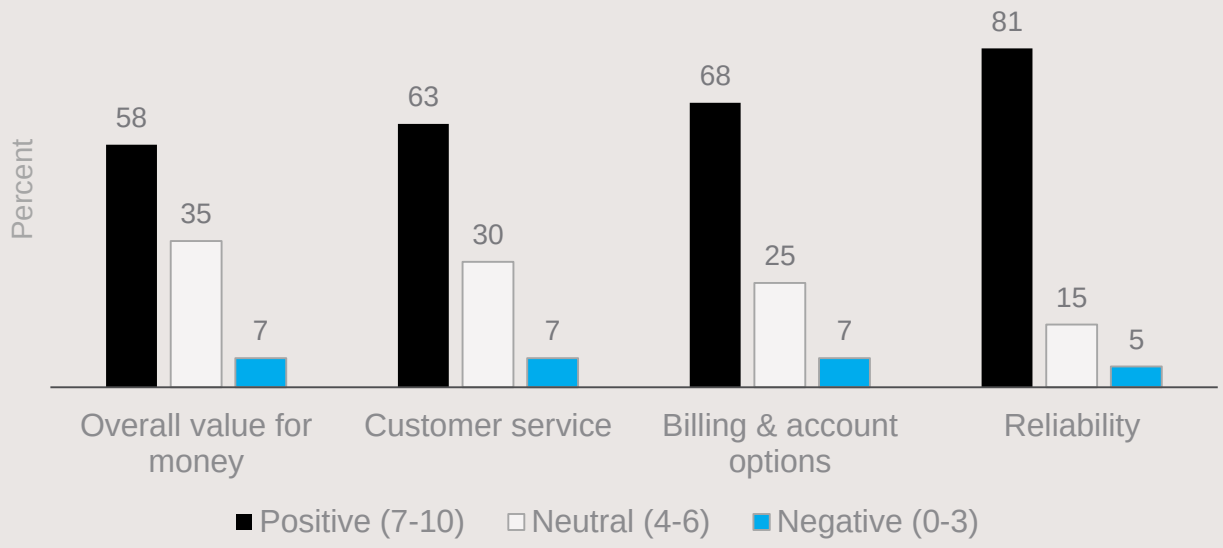
Mid-pack in satisfaction with gas services

New South Wales residents are more satisfied with their gas services than electricity services across all measures.

- The gap between levels of satisfaction with electricity compared with gas services is not as big as in other states.

"How would you rate the [attribute]"

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



Base: New South Wales consumers with gas (n=246)

Value for money for electricity closer to other services in New South Wales than in other states & territories

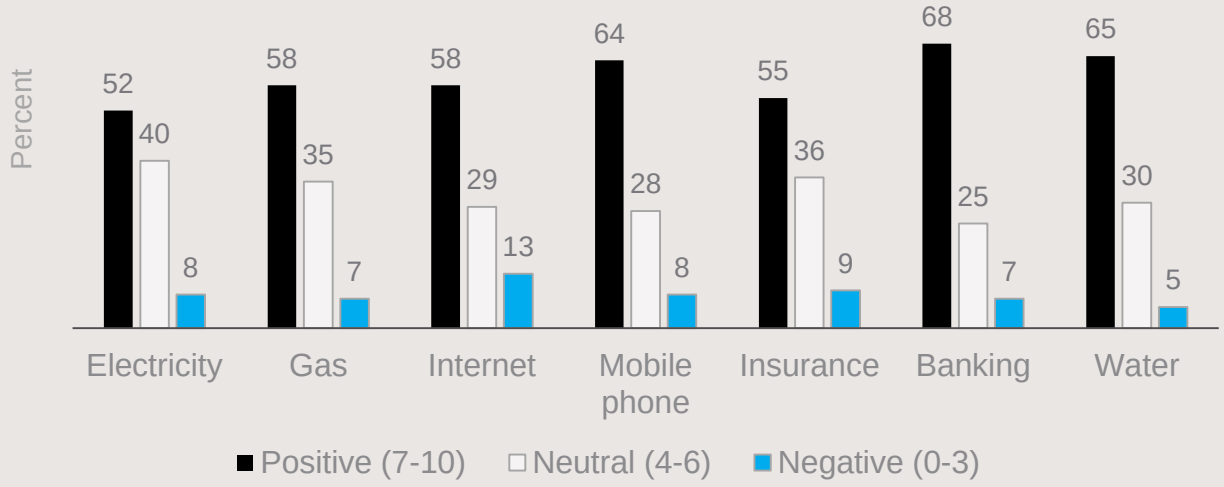
Satisfaction with value for money of several other services tested in this survey is a little lower in New South Wales as it is in other states and territories.

- 68% of New South Wales residents are satisfied with the value for money of banking services, compared with 77% in Tasmania.

Because satisfaction with the value for money of electricity is relatively high in New South Wales, this means that value for money ratings for electricity are relatively close to value for money ratings for other 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'



New South Wales consumers relatively confident in their own abilities.

69% of New South Wales residents say they are confident in their own ability to make choices on energy products and services, the highest of all the states and territories.

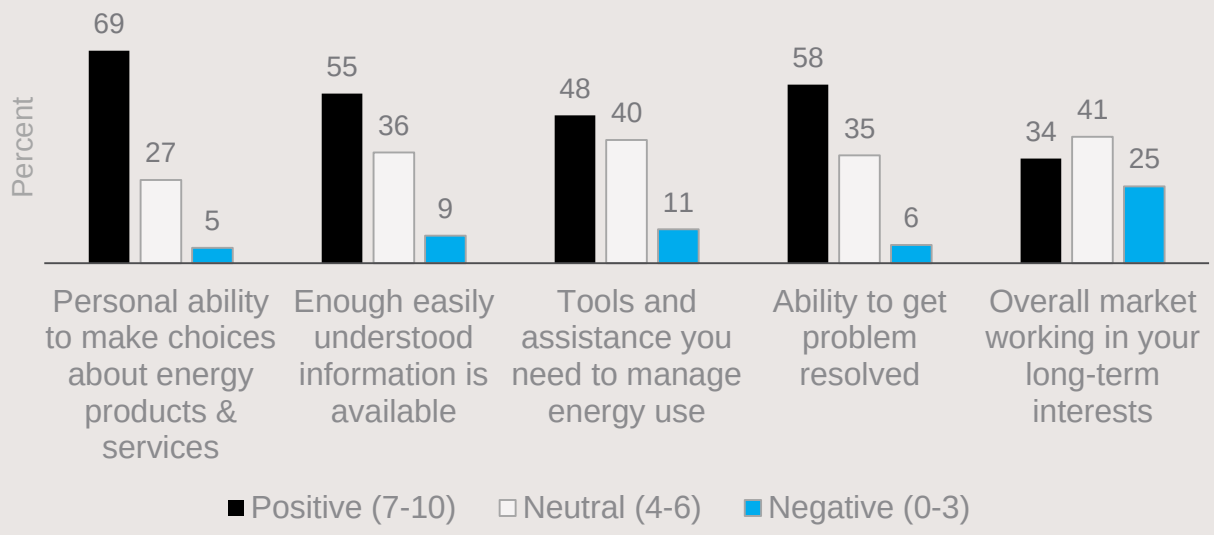
- New South Wales household consumers are also relatively confident that enough information is available, with 55% feeling confident (equal with South Australia and ahead of all other states and territories).

Despite the high level of confidence in their own abilities and relatively high satisfaction with the levels of competition, New South Wales residents are no more confident that the energy market is working in their long-term interests.

- 34% are confident that this is the case, putting New South Wales behind Victoria (39%) and roughly equal with South Australia (35%) on this measure.

How would you rate the [attribute]

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



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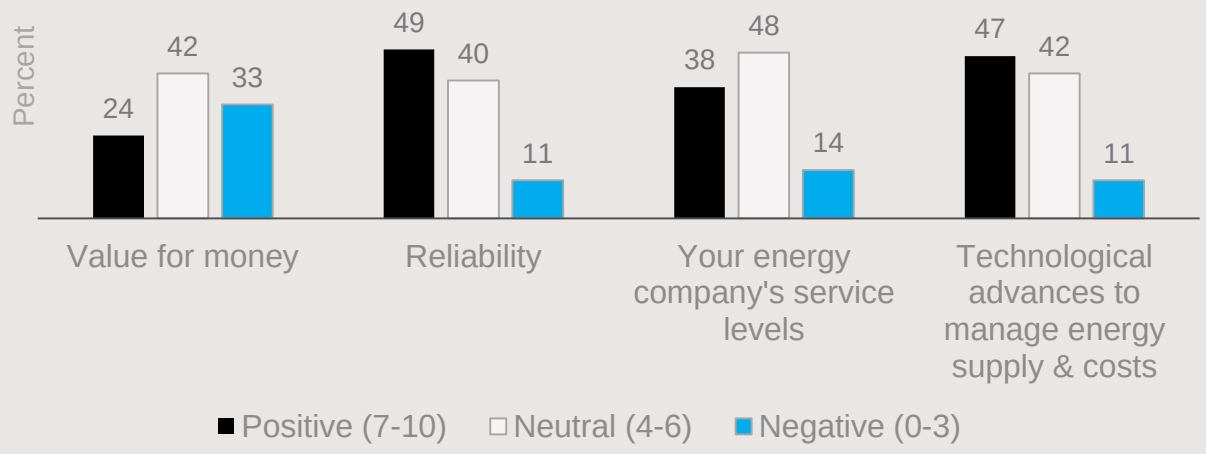
Satisfaction with value for money and competition has not meant confidence in future outcomes

Even though New South Wales household consumers are the most likely to be satisfied with the value for money of electricity and are also relatively satisfied with the levels of competition, less than a quarter are confident that the market will provide better outcomes in terms of value for money in the future.

- 24% say that they are confident, while 33% are not confident, both of which are in line with the national average.
- Similarly, New South Wales household consumers are less likely than Victorian residents to say the market will provide better outcomes in terms of reliability (49% versus 57%) or in terms of customer service levels (38% versus 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'

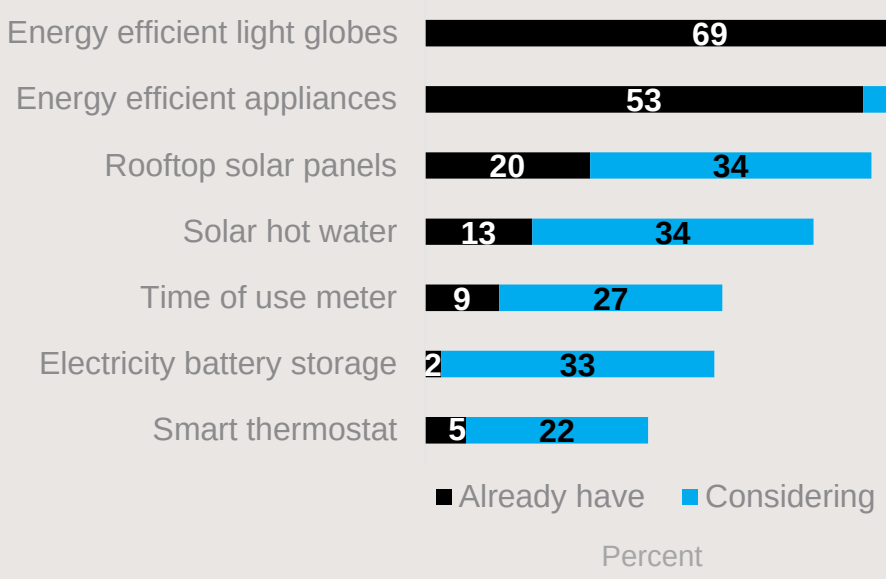


Fewer New South Wales householders have time-of-use meters

New South Wales household consumers come in mid-range for most of the technologies tested in this survey, apart from time-of-use meters.

- 9% report currently having time of use meters, compared with 38% in Victoria and 13% in Queensland.
- New South Wales household consumers are, however reasonably open to getting time-of-use meters, with 27% saying that they are considering such meters.
- The proportion of New South Wales residents who are not at least considering energy efficient light globes and energy efficient appliances is relatively high, with 11% not currently considering the light globes and 14% not at least considering energy efficient appliances.

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



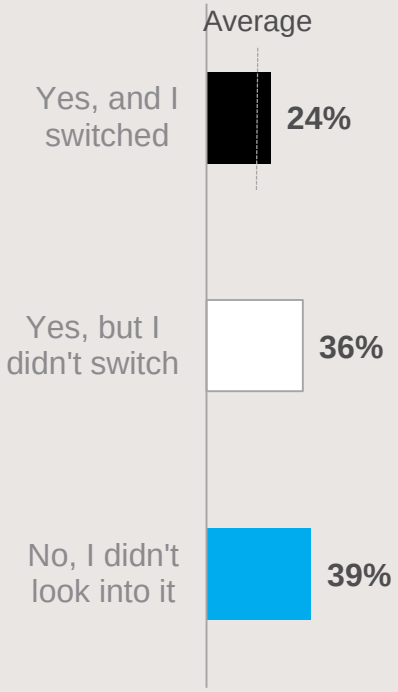
New South Wales residents more likely to have switched

60% of New South Wales household consumers say they have at least considered switching energy companies or plans in the last 3 years.

- 24% have actually done so, equal with Victoria as the highest in the country. 36% considered it but did not do so.
- The total who at least considered switching is therefore only 2% behind Victoria and equal with South Australia.

Previous behaviour

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



Value for money still very important

Despite New South Wales household consumers' relatively high satisfaction with the value for money of electricity services, dissatisfaction with value for money is still a big reason for considering switching.

- 42% say that they looked at switching because they were unhappy with the value for money they were receiving, equal with Victoria as the highest of all states.
- 31% said that they were not dissatisfied but found a better deal elsewhere.

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

Base: New South Wales household consumers who considered switching in the last 3 years (n=245)

New South Wales household consumers often stay because they're content

43% of New South Wales household consumers who had not looked at switching said that this was because they were happy with the deal they had now.

- This was clearly the highest of any state or territory in this survey.
- The numbers citing the time and effort involved in switching were about the same as in other relatively competitive states.

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

Base: New South Wales household consumers who had not considered switching in the last 3 years (n=160)

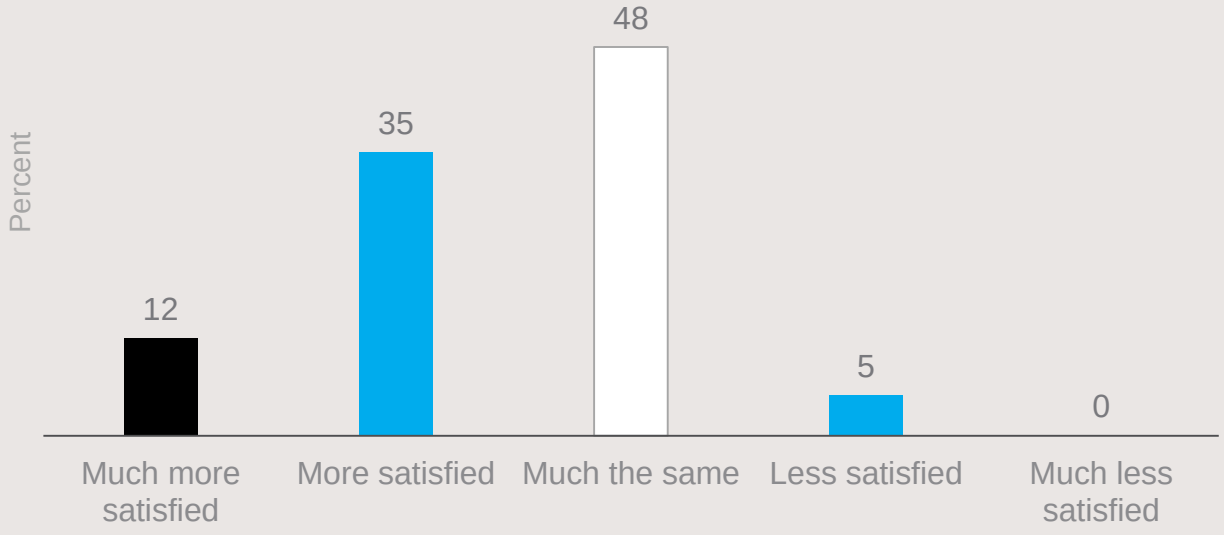
Essential. RESEARCH

Comparing options increases satisfaction for New South Wales household consumers.

47% of those who looked at switching say that they are now more satisfied with the value for money they receive.

- This suggests a relationship between investigating your options, and being satisfied, which is intuitive.
- This is the highest of all the states and territories, and compares with a total of 41% who felt more satisfied in Victoria (the next highest).

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



Base: New South Wales household consumers who considered switching in the last 3 years (n=245)

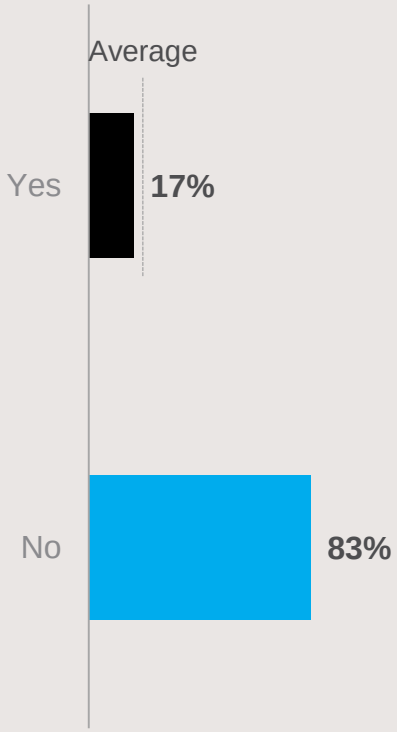
Around average for switching in the year ahead

Despite New South Wales household consumers being more likely to have switched, the number who intend to change in the year ahead is only around the national average.

- 17% think they will change in the year ahead, which is behind both Victoria (27%) and South Australia (22%).

Future intentions

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

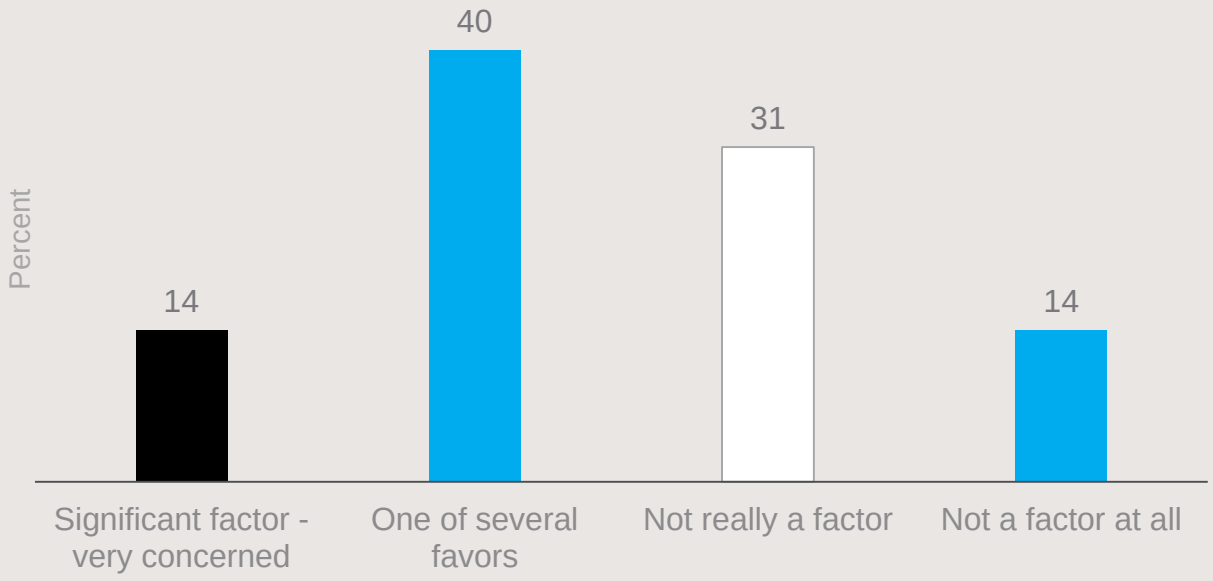


Also around the average on the environment

54% of New South Wales household consumers say that the environment is a factor they consider when making decisions about energy products and services.

- 14% say that it is one of the most important factors, putting New South Wales behind ACT (18%) but ahead of Queensland (10%).
- 40% consider it to be one of several factors, which is behind Western Australia (50%) but slightly ahead of again Queensland (38%).

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

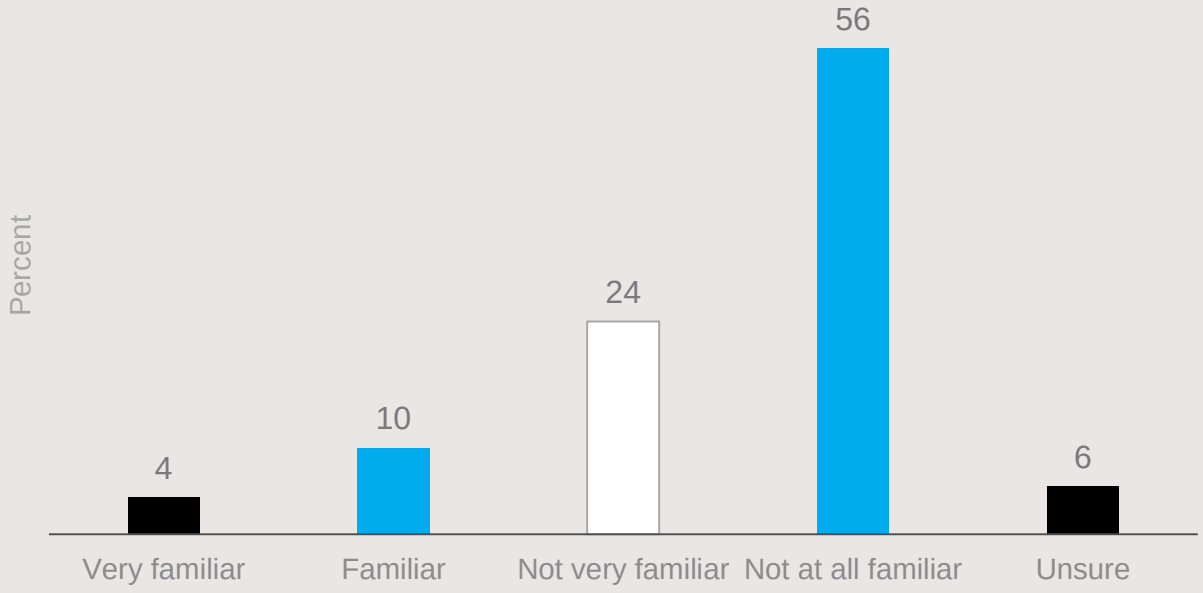


Awareness of ECA low, but higher than several other states

14% of New South Wales household consumers say they are familiar with ECA.

- This is behind Victoria (16%) but ahead of South Australia (9%) and Queensland (8%).

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



Essential. RESEARCH

Victoria

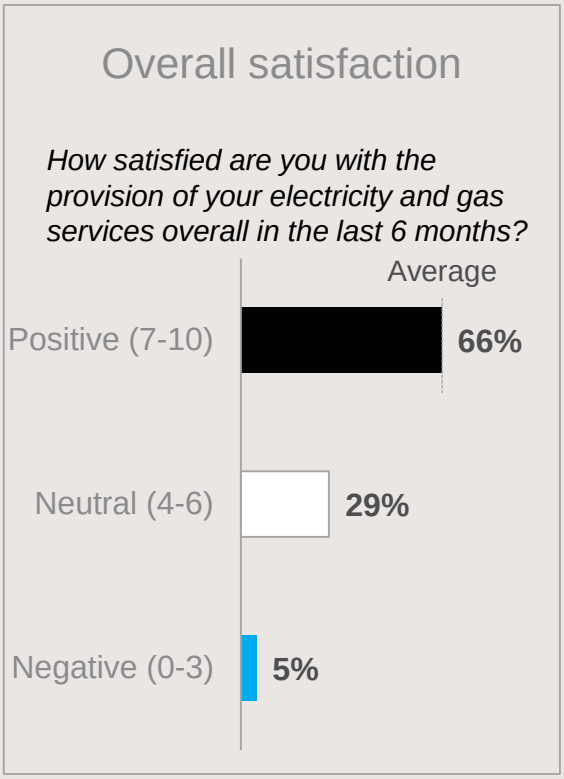
Highest for satisfaction with competition

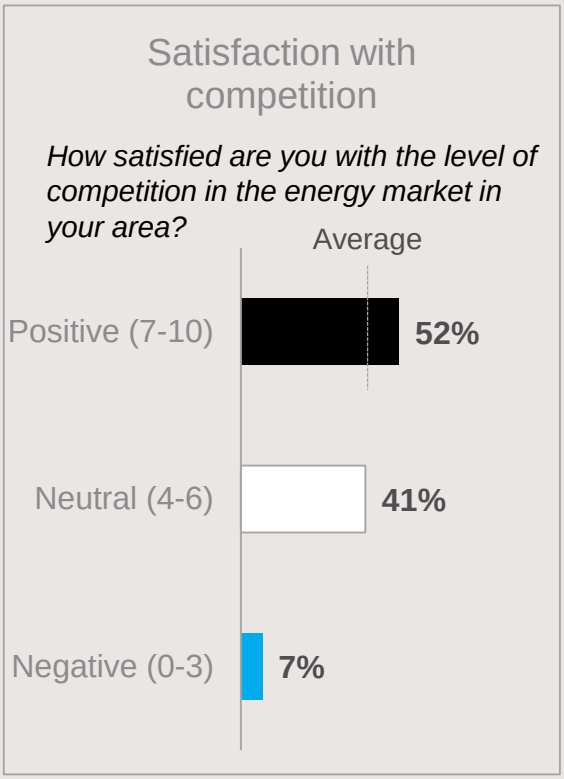
66% of Victorians say they are satisfied with the provision of electricity and gas services overall.

- This is about average for the states and territories, and little different to the results in New South Wales and Queensland.

Victorians are, however the most likely to be satisfied with the level of competition in the market.

- 52% say they are satisfied with the level of competition, while only 7% are dissatisfied.
- In New South Wales, 48% are satisfied with the level of competition and 12% are dissatisfied.





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Less satisfied on reliability and faults

Despite being more satisfied with the level of competition, Victorians are less satisfied than New South Wales residents with the value for money they get for electricity.

- 49% are satisfied, behind New South Wales (52%) but ahead of all other states and territories.

Victoria is behind most other states and territories, however, on satisfaction with both reliability and the management of faults.

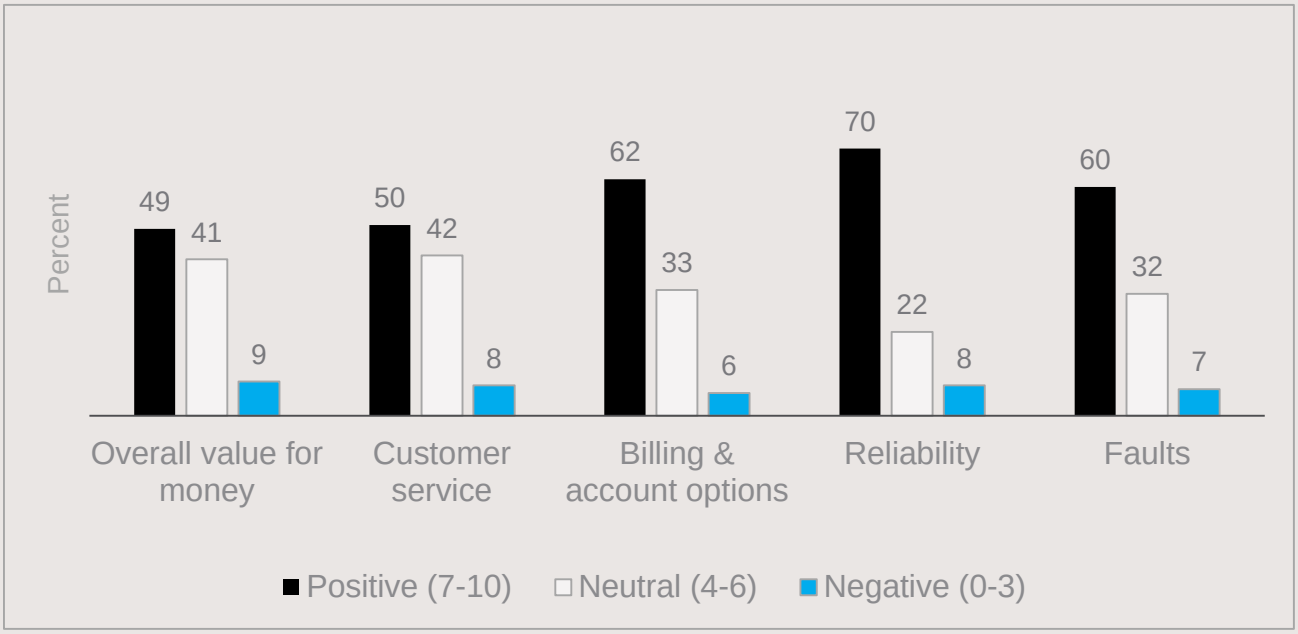
- 70% are satisfied with reliability, compared with 82% in ACT and 78% in Queensland, WA, South Australia and Tasmania.
- 60% are happy with the way faults are managed, well behind Western Australia (72%)

Despite this, Victoria has the best Net Promoter Score.

- The NPS is -23%, made up of 19% advocates and 42% detractors.

"How would you rate the [attribute]"

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



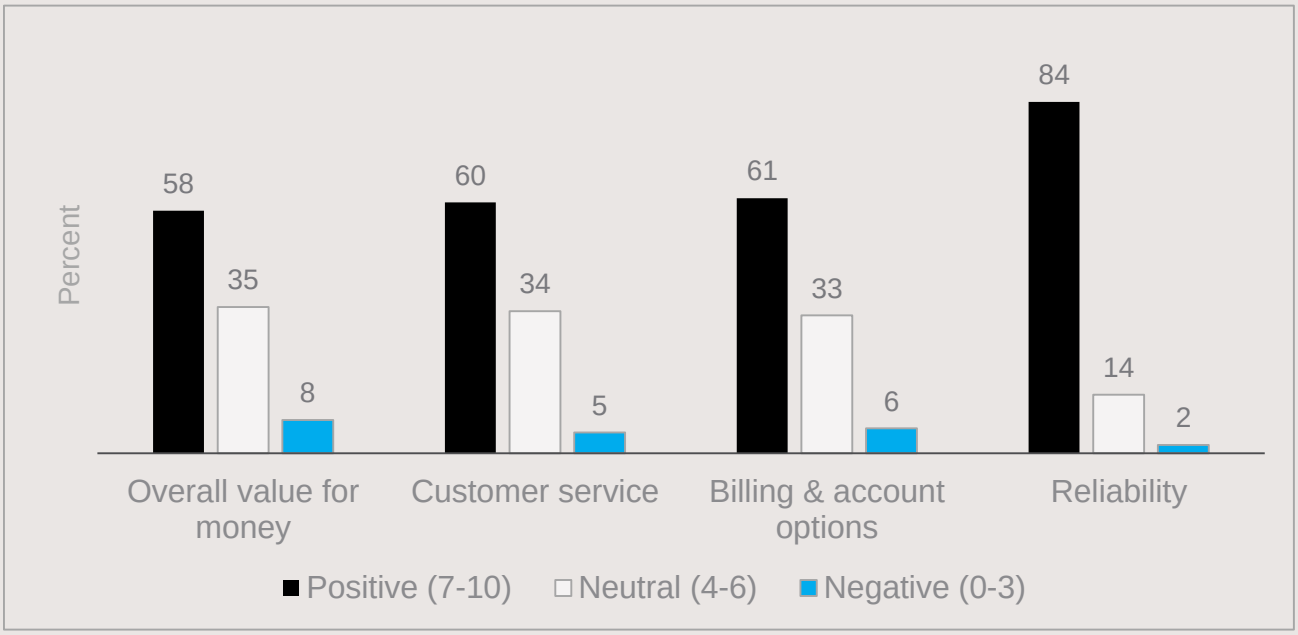
Problems with clarity of billing?

Along with WA household consumers, Victorians are the most likely to have mains gas, and their ratings for most aspects of their gas companies are around the national average.

- The exception is on billing and account options, where Victoria comes in behind most other states and territories. 61% are satisfied with billing and account options, compared with 72% in WA and 68% in both New South Wales and South Australia.
- As will be discussed, Victorians who have not considered switching electricity and gas providers are relatively likely to say that the options are confusing and / or that they fear being worse off. This could reflect confusion over bills – if people find bills difficult to understand, they may find it hard to judge whether or not they could get a better deal elsewhere.

"How would you rate the [attribute]"

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



Base: Victoria consumers with gas (n=359)

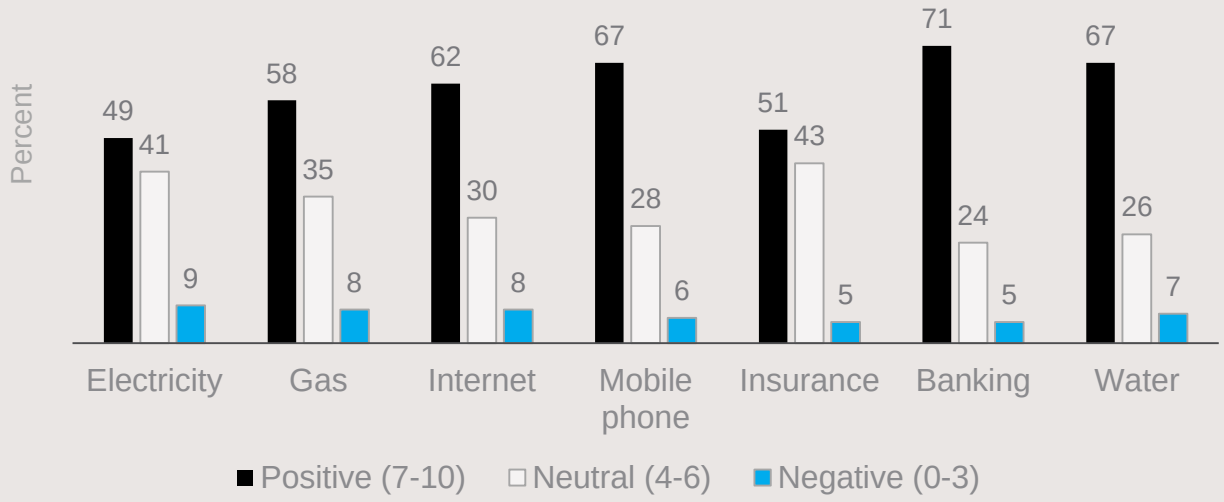
Value for money for electricity behind banking, water & mobile services, but close to insurance

Satisfaction with value for money of electricity compared with other services is relatively strong in Victoria. The gap between electricity and internet (for example) is 13%, compared with the national average of 19%.

- Victorians are more likely to be satisfied with water services (67%, putting Victoria almost equal with the top two states, WA and the ACT, both on 68%).
- Victorians are less likely to be satisfied than those living elsewhere with insurance services (51% are satisfied, the equal lowest of all the states and territories).

"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'



Most confident that market is working in their interests, but still significant doubt

65% of Victorians feel confident in their own ability to make choices on energy products and services.

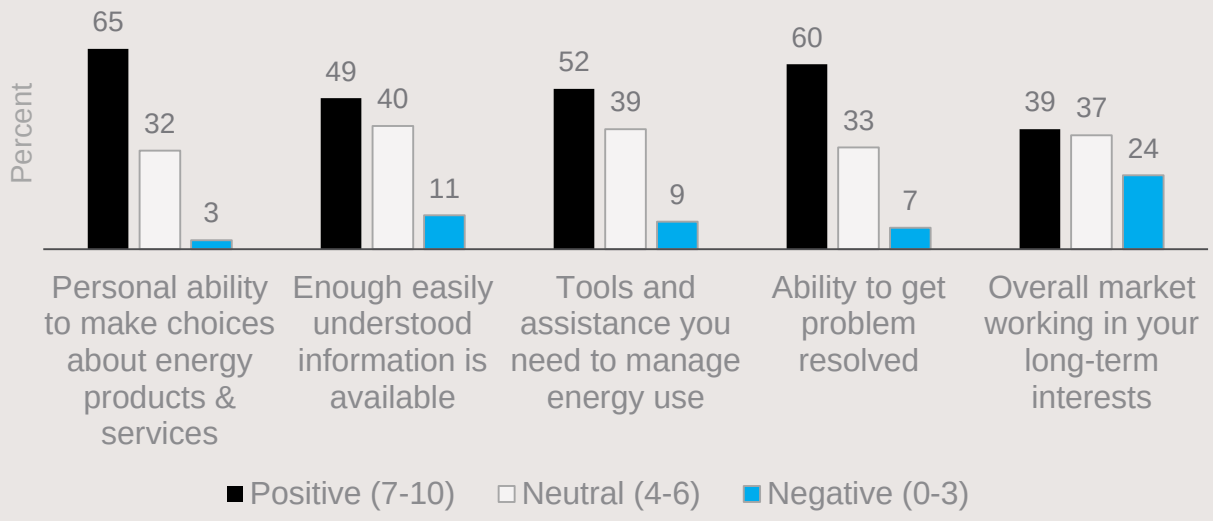
- This puts Victoria behind New South Wales (69%) but ahead of Tasmania (55%) and the ACT (60%).

Victorians are clearly the most likely to say that they are satisfied that the overall market is working in their interest.

- 39% feel confident in this, putting Victoria ahead of South Australia (35%), New South Wales (34%) and especially Tasmania (20%).
- On the other hand, they are also relatively likely to say that they do not feel confident in this. The fact that they are more likely to have a view on whether the market is working in their long term interests (because they are less likely than those in other states and territories to give neutral ratings) suggests a relatively high level of engagement with the market.

How would you rate the [attribute]

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



Essential. RESEARCH

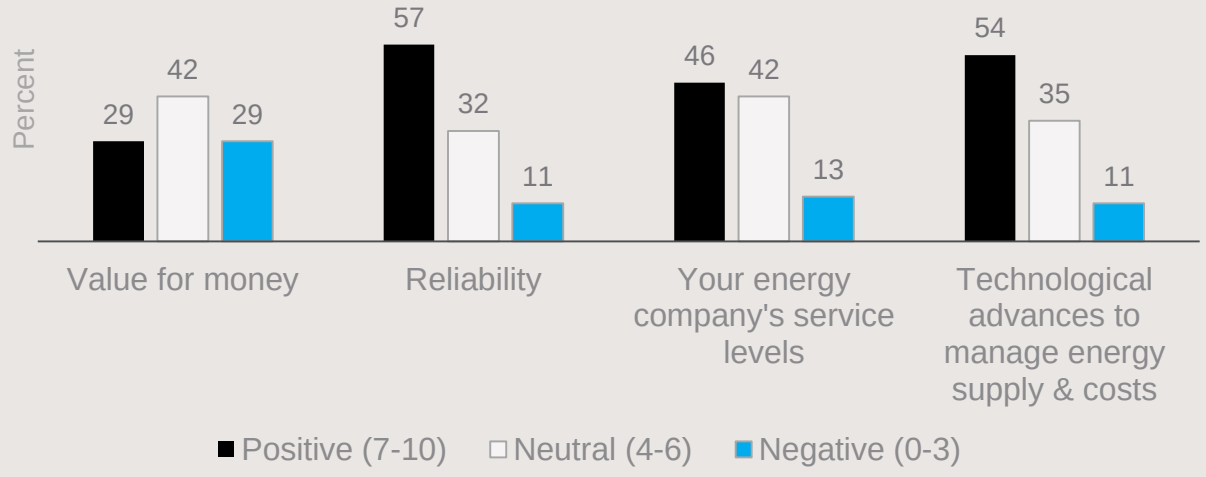
Still not that confident market will deliver value for money

Victorians are the most likely to say they are satisfied with the level of competition, and in turn are the most likely to expect that the market will deliver better outcomes in terms of value for money. Despite this, there is still a substantial proportion who disagree.

- Although 29% are confident that the market will deliver better outcomes in terms of value for money (the highest in the country), 29% are not confident.
- They are relatively confident that the market will deliver greater reliability (57%, compared with 51% in Queensland, the next highest state) and customer service (46% compared with 43% in both Queensland and WA).

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'



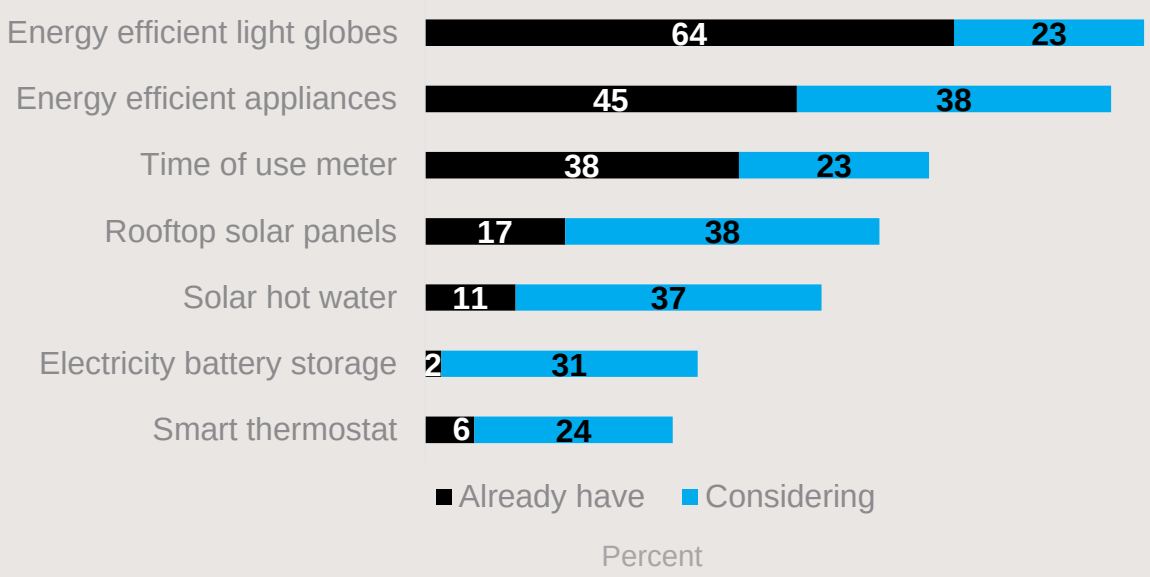
Essential. RESEARCH

Time of use meters much more common in Victoria

38% of Victorian household consumers report having time of use meters – a surprising result given the recent state-wide roll out. However this is consistent with the result of a survey carried out by Essential Research for Energy Consumers Australia in December 2015.

- 23% say they are considering purchasing a time of use meter, suggesting a captive market of people who already have this type of meter but are unaware of that fact. It suggests that potentially a targeted education campaign could encourage Victorian household consumers to take more advantage of their time of use meters.
- 55% of consumers either have solar panels or are considering adopting them. 3 in 5 of these consumers are also looking at electricity battery storage.

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



Essential. RESEARCH

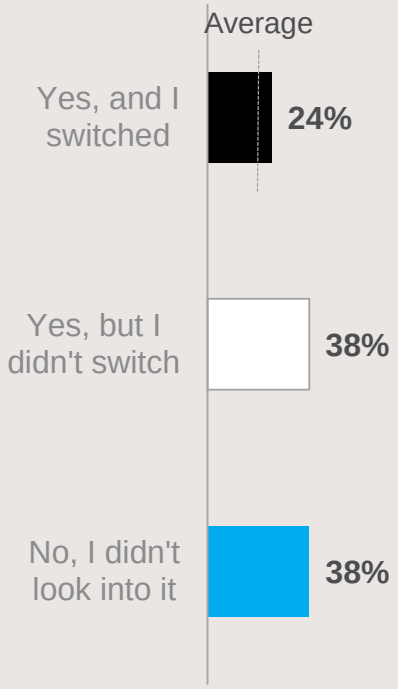
Victorians relatively likely to have switched in the past.

62% of Victorians have at least considered switching energy providers or plans in the last three years, slightly ahead of all other states and territories.

- 24% have switched in the last 3 years, equal highest alongside New South Wales.
- 38% considered switching but did not, behind only South Australia (42%)

Previous behaviour

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



Value for money again key reason for switching

Like other states where the market is relatively competitive, most household consumers in Victoria who have at least considered switching were looking for better value for money.

- Along with New South Wales, Victoria is the state where consumers were most likely to say that they looked at switching because they were dissatisfied with the current value for money
- A further 28% said that they were not dissatisfied but found a better deal elsewhere.

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

Base: Victorian household consumers who considered switching in the last 3 years (n=257)

Confusion relatively big barrier to switching

Although the main reason given for not considering switching was that householders were happy with the deal they had now, this came through less often in Victoria than it had in New South Wales

- 27% of Victorians who had not considered switching, compared with 43% of New South Wales residents.

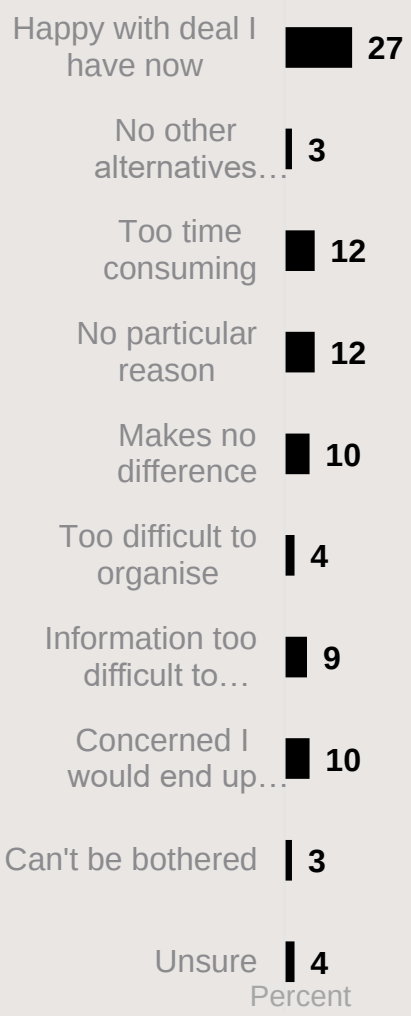
Instead, there was more evidence of Victorians finding the process of switching confusing. They were more likely than people in other states and territories to say:

- That they were concerned that they would end up worse off
- That the information was too difficult to understand.

They were also more likely than everyone apart from New South Wales residents to say that switching is too time consuming, and more likely than everyone apart from South Australians to say that switching would make no difference.

- Both of these could reflect a process of switching that makes it too difficult to work out which deals were better.

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



Base: Victorian household consumers who had not considered switching in the last 3 years (n=156)

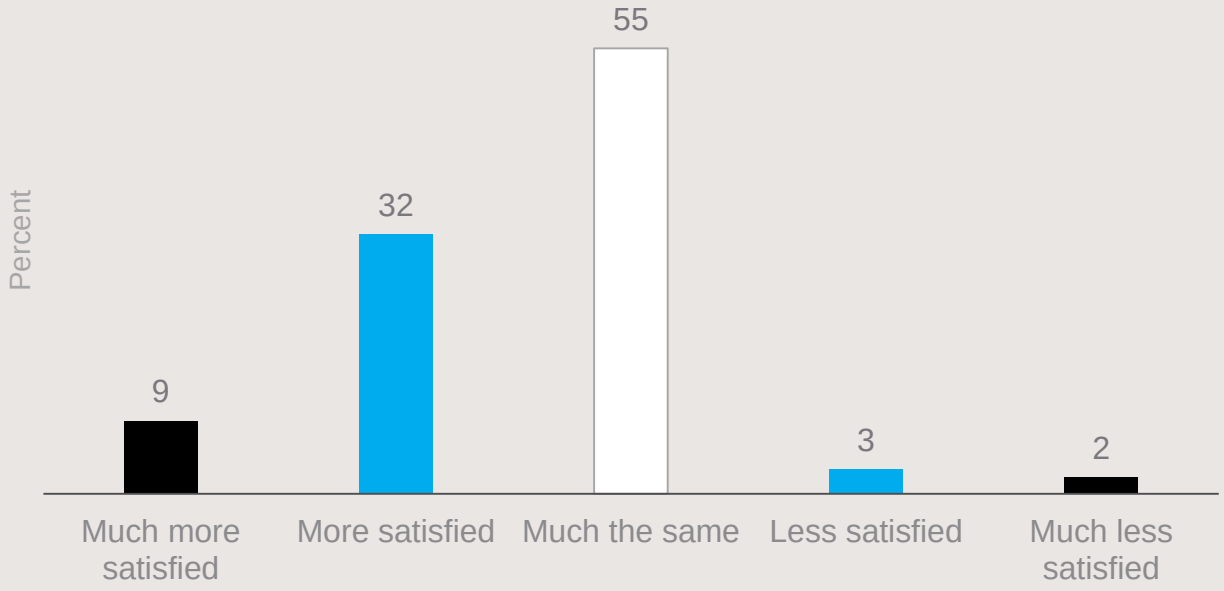
Essential. RESEARCH

Looking at switching helps make Victorians feel more satisfied

41% of those who looked at switching say that they are now more satisfied with the value for money they receive.

- This is consistent with the correlation found in New South Wales
- This percentage is above Queensland and South Australia, but behind New South Wales.

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



Base:Victorian household consumers who considered switching in the last 3 years (n=257)

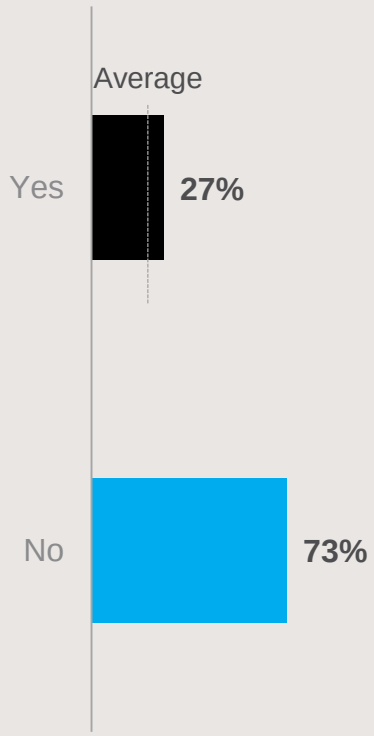
Victorians most open to switching in the future.

Victorians are clearly the most likely to say they intend to switch in the year ahead.

- 27% intend to do this, compared with 22% in South Australia and 17% in New South Wales.

Future intentions

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

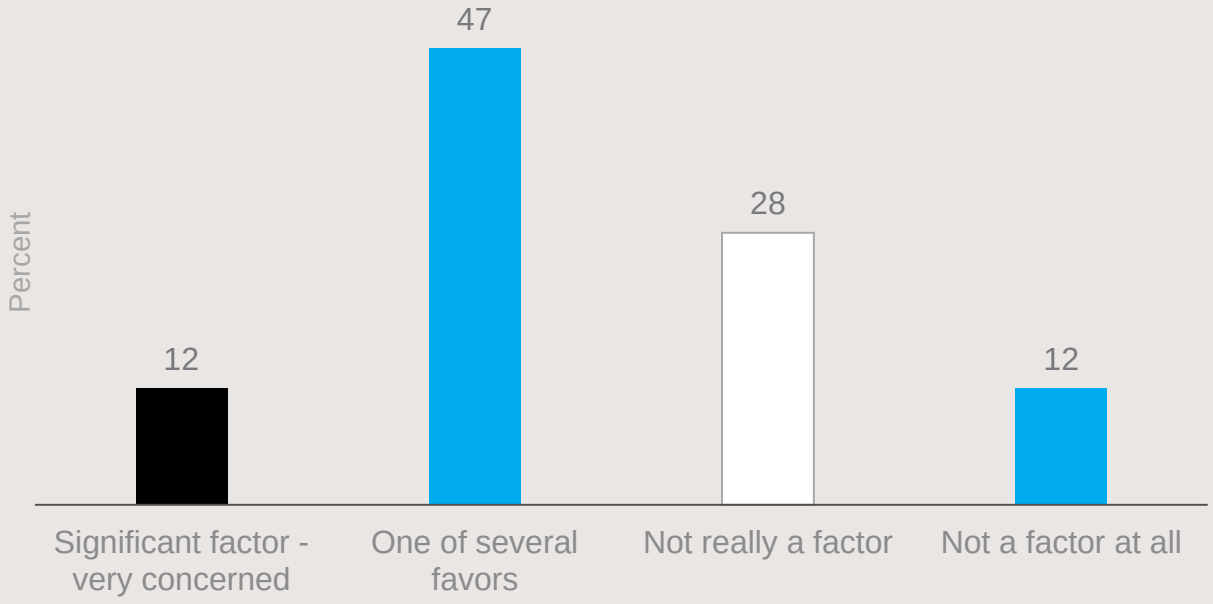


Moderate concern about the environment

59% of Victoria household consumers say that the environment is a factor they consider when making decisions about energy products and services.

- 12% say it is one of the most significant factors they consider, compared with 18% of ACT household consumers and 17% of Tasmanians.
- 47% say it is one of several factors they consider, behind Western Australia (50%) but ahead of New South Wales (40%).

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

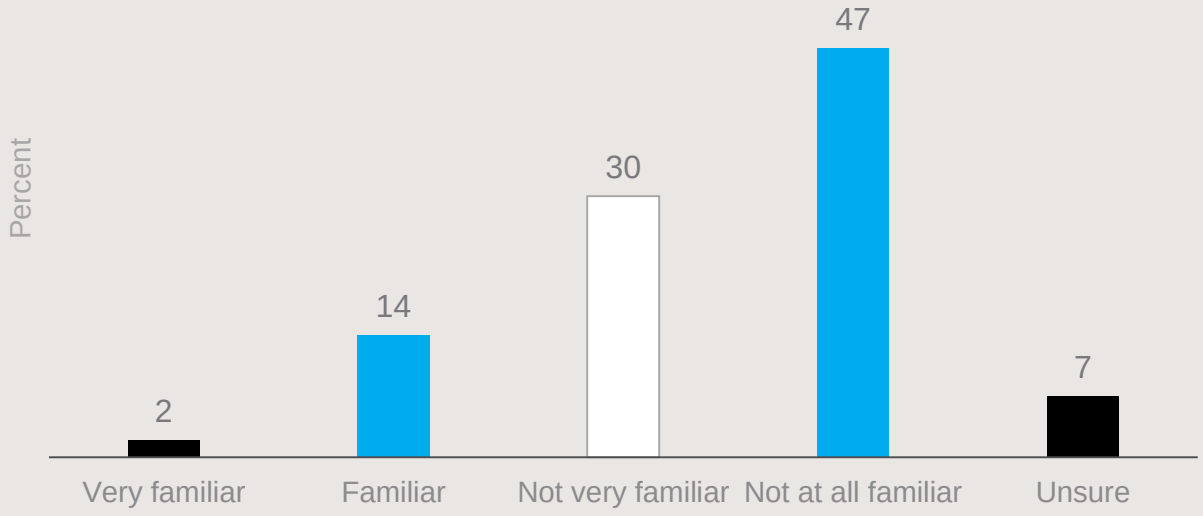


Highest declared awareness of ECA

16% of Victorians claim to be familiar with ECA.

- Victoria is therefore ahead of New South Wales (14%), while all other states and territories have below 10% claiming to be familiar with ECA.

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



Essential. RESEARCH

Queensland

Behind New South Wales & Victoria on competition

Queenslanders are around the national average for overall satisfaction with electricity and gas services.

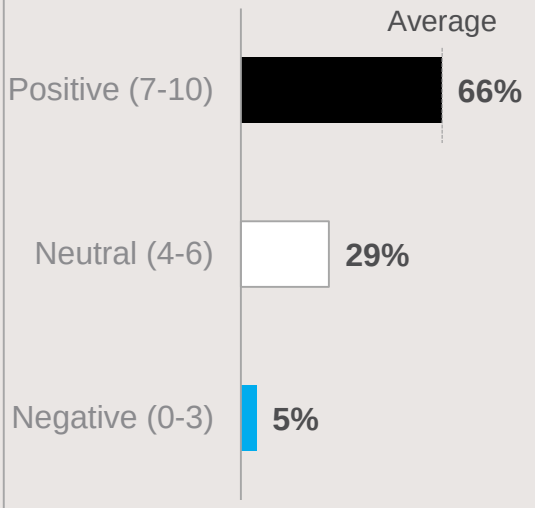
- 66% are satisfied with electricity and gas services overall, putting Queensland on a par with New South Wales, Victoria and South Australia.

They are, however, clearly less satisfied with the levels of competition than the other three big states in the national energy market.

- 37% give positive ratings to the level of competition, clearly behind Victoria (52%), New South Wales (48%) and South Australia (48%).

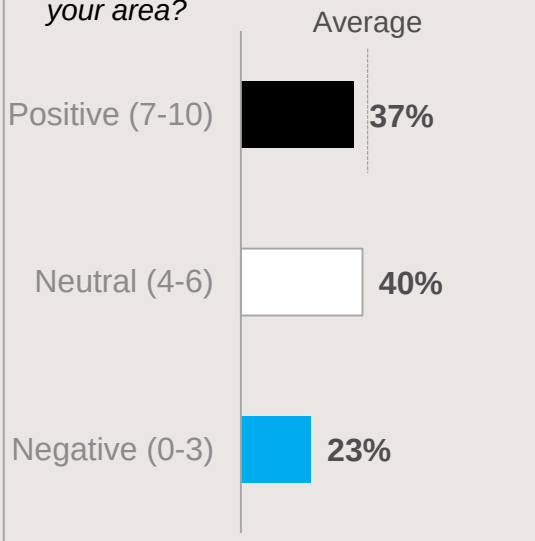
Overall satisfaction

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



Satisfaction with competition

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

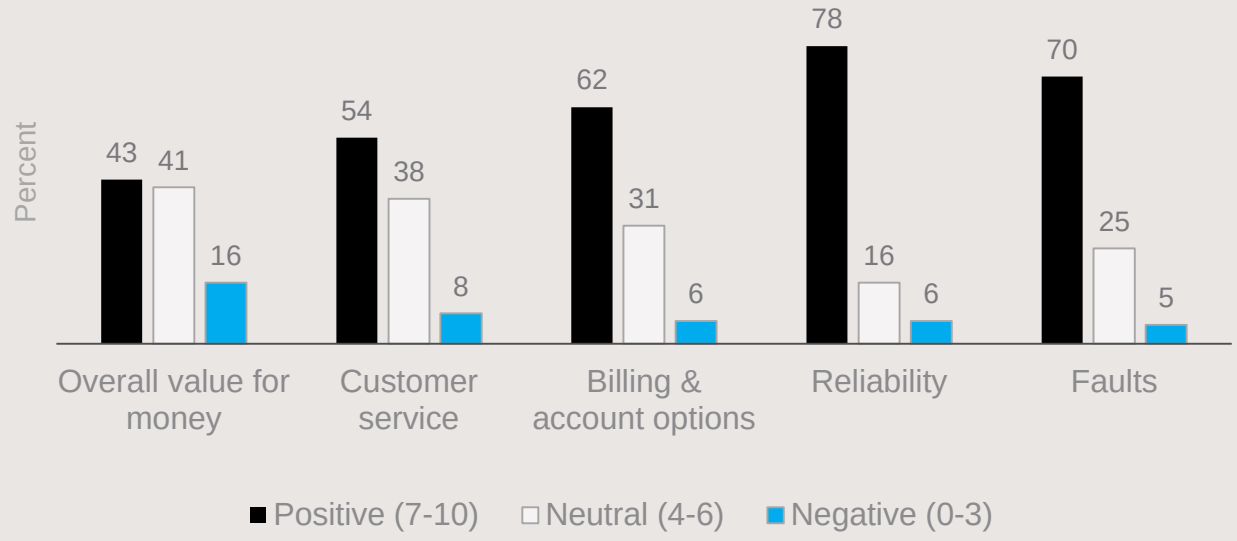


Low on value for money, but fairly good numbers for reliability and faults

43% of Queensland household consumers are satisfied with the value for money they get for electricity.

- This is behind both New South Wales (52%) and Victoria (49%)
- Queenslanders do, however, give better ratings than people from either of those states for reliability of electricity (78% compared with 72% in New South Wales and 70% in Victoria), and the handling of faults (70% compared with 60% in both states).

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

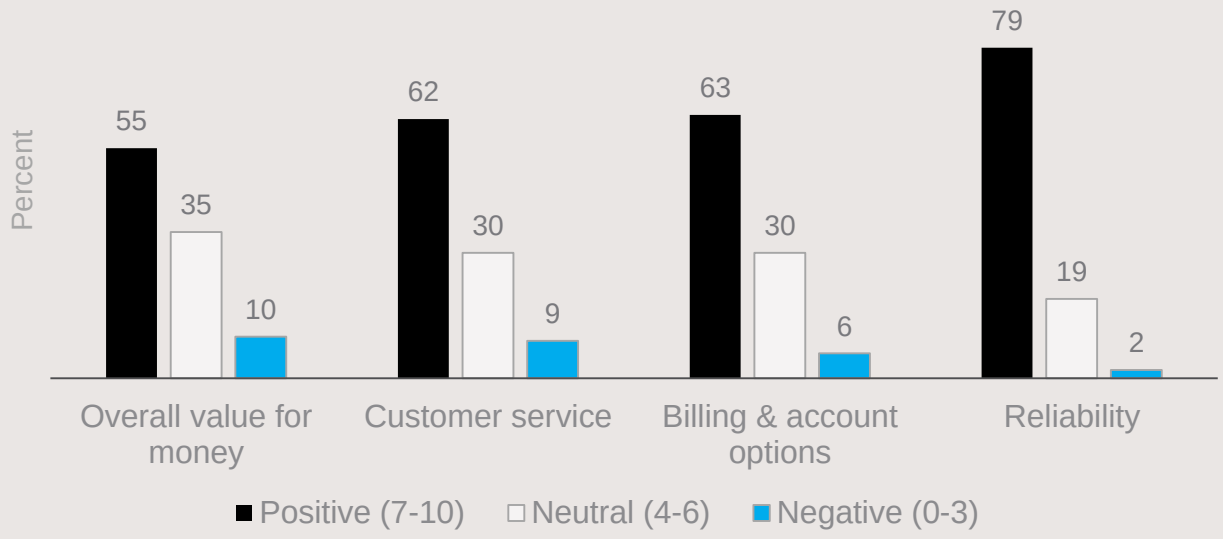


Relatively open to recommending gas supplier to others

Queenslanders are around the national average for ratings of gas services, with the exception of:

- 79% are satisfied with the reliability of gas services, below both Western Australia (91%) and the ACT (87%).

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



Base: Queensland consumers with gas (n=140)

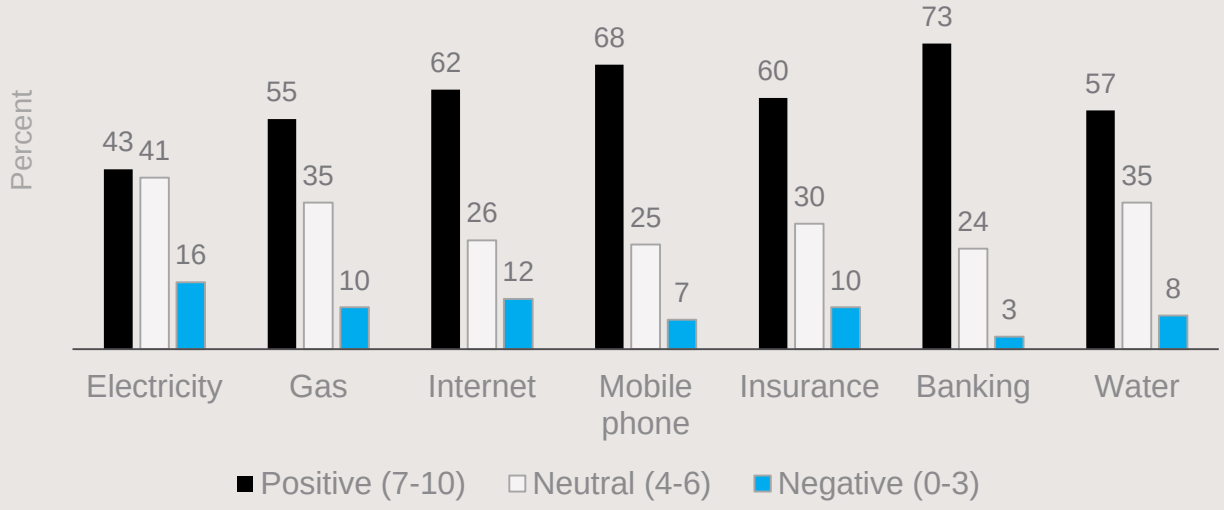
Value for money ratings for gas and water are similar

The main difference between Queensland and the other states and territories on these variables is for water.

- 57% are satisfied with the value for money of water, compared with 67% in Victoria and 65% in New South Wales.
- Satisfaction with the value for money of electricity is, however, still clearly behind all these other 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'



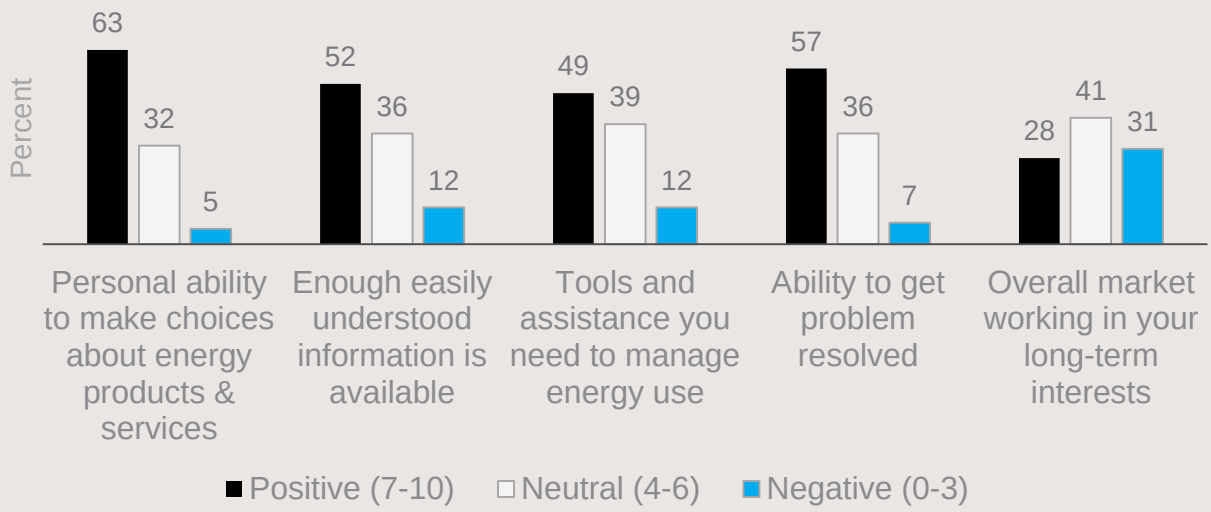
Greater doubt that market is working in their interests

Queensland household consumers are in line with the national average for all the confidence variables, apart from confidence that the market is working in their interests.

- 28% feel confident in this, compared with 39% in Victoria, 35% in South Australia and 34% in New South Wales.
- 31% do not feel confident, equal with Tasmania as the highest for any state or territory.

How would you rate the [attribute]

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



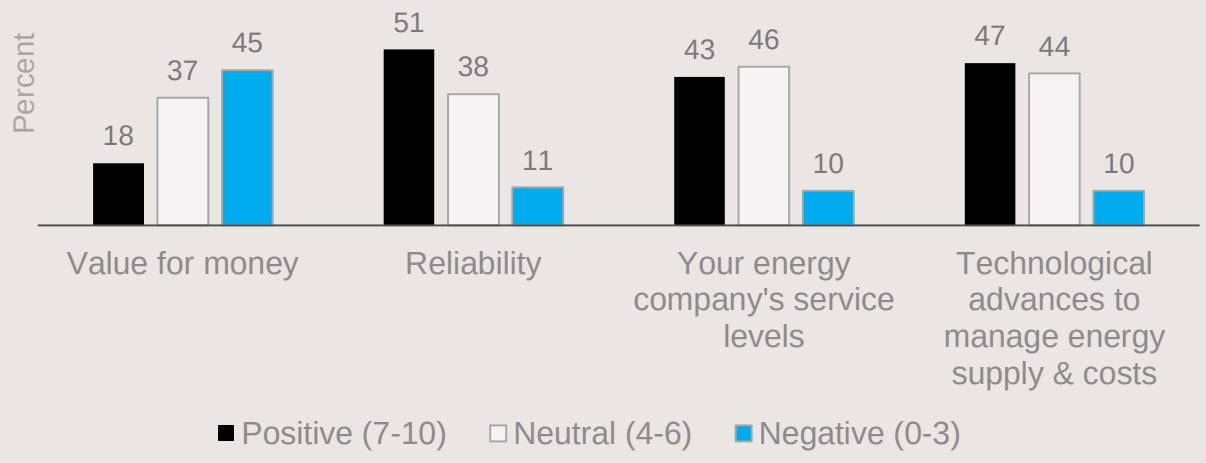
Low confidence in market reflected in low confidence that it will deliver value for money

Only 18% of Queensland household consumers say that they are confident that the market will deliver better value for money in 5 years time.

- Only Tasmania (14%) scores lower than Queensland on this attribute, where Victoria (29%) is the clear leader.

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'

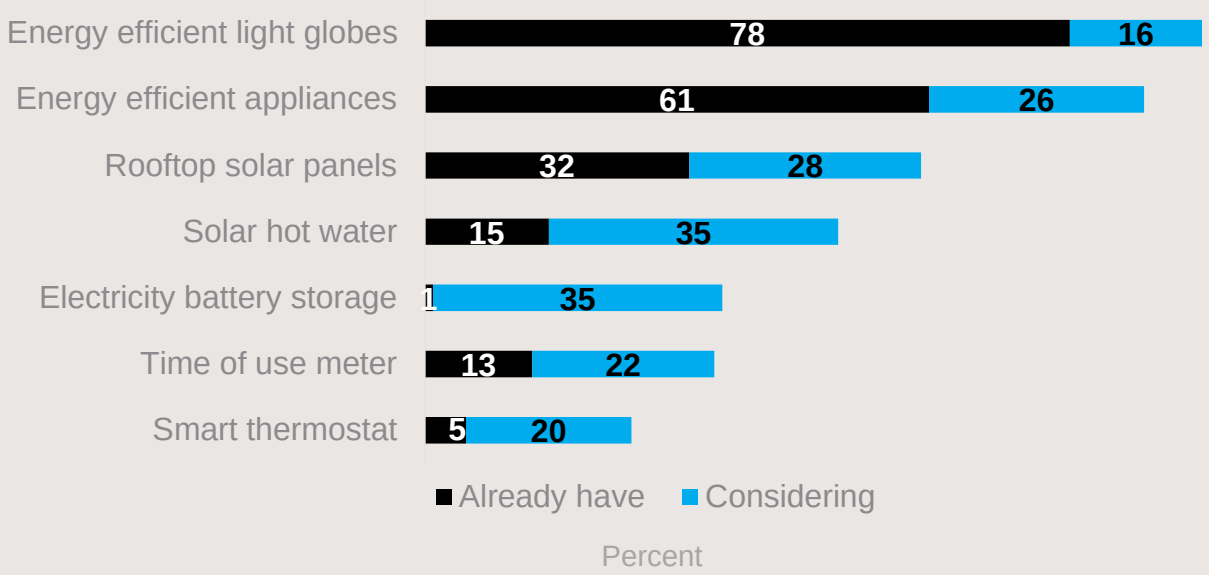


Still plenty of potential to extend market for solar

Although Queenslanders are alongside South Australians and Western Australians as the household consumers most likely to have rooftop solar panels, there are still a substantial number who do not have it who are open to getting it in the future.

- 32% of Queensland household consumers in this survey said that they already had rooftop solar panels, and another 28% say they are considering getting it. This suggests that the potential market for solar could almost double.
- Similarly, Queenslanders are relatively likely to already have solar hot water, and 35% say they are considering it.
- 35% of consumers were also looking at adopting electricity battery storage.

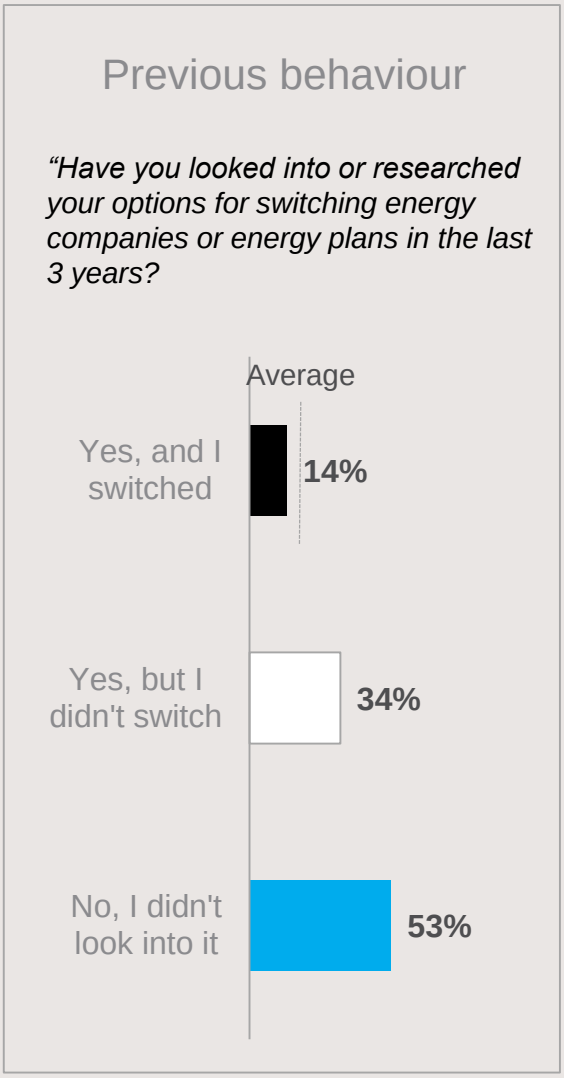
Do you already have, or are you considering purchasing or using any of the following technologies to manage the cost of electricity in your household?



Less history of switching.

The proportion of Queenslanders who have switched or at least considered doing so in the last three years is relatively low.

- 14% have switched in the last three years, putting Queensland ahead of only Tasmania (1%) and the ACT (9%).
- 34% considered switching but did not do so, which again is behind New South Wales, Victoria and South Australia.



Lower numbers switching, but same reasons

Price and value for money continue to dominate the reasons for considering switching.

- 41% say that they switched because they were dissatisfied with the value for money they received, on a par with both New South Wales and Victoria.
- 29% were not dissatisfied but found a better deal elsewhere, which again is similar to what was recorded in the other states and territories.

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

Base: Queensland household consumers who considered switching in the last 3 years (n=138)

Perceived lack of options deterring switching

Although one in four households said that the main reason for not considering switching was that they were happy with the deal they had now, lack of choice came through more strongly in Queensland than in some other states.

- 15% said that they had not looked at switching because there were not aware of any alternatives.

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

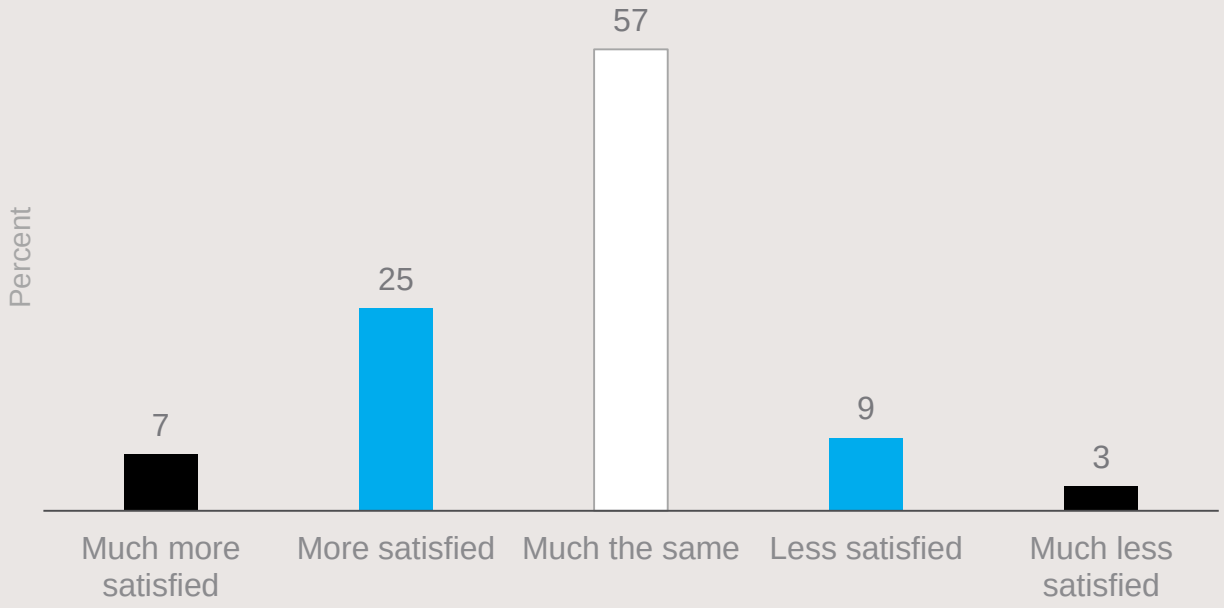
Base: Queensland household consumers who had not considered switching in the last 3 years (n=153)

Looking at switching has less effect on Queenslanders

57% of those who looked at switching say that it made no difference to how satisfied they were with the value for money they received.

- This compares with 48% in New South Wales.
- 32% of Queensland household consumers said that looking at switching made them feel more satisfied, compared with 47% in New South Wales, 41% in Victoria and 41% in Western Australia.

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



Base: Queensland household consumers who considered switching in the last 3 years (n=138)

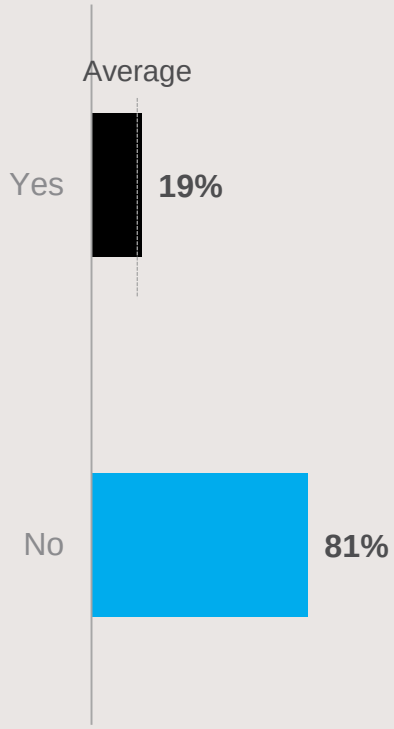
Also not especially open to switching in the future.

In line with the fact that they are less likely to have considered switching, Queenslanders are also less likely than Victorians or South Australians to be considering switching in the near future.

- 19% expect to switch in the year ahead, behind both Victoria (27%) and South Australia (22%).

Future intentions

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

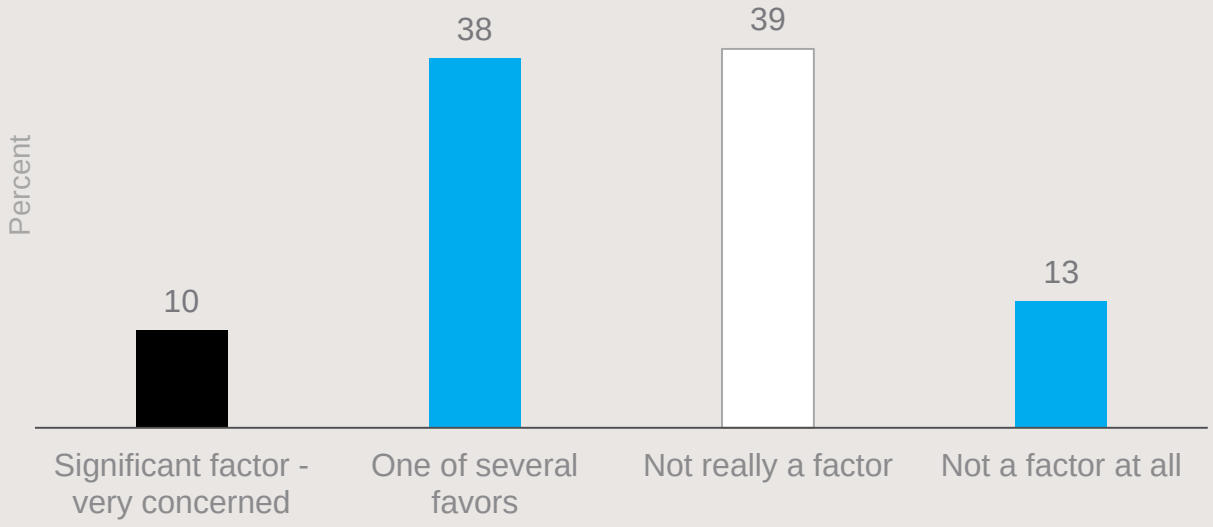


Environment less relevant to energy decisions

Queensland household consumers are less likely than people from most other states and territories to say they consider the environment when making decisions about energy products and services.

- 10% say that it is a significant factor, compared with 14% in New South Wales and 15% in Western Australia.
- 38% identify it as one of several factors, compared with 50% in Western Australia.

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

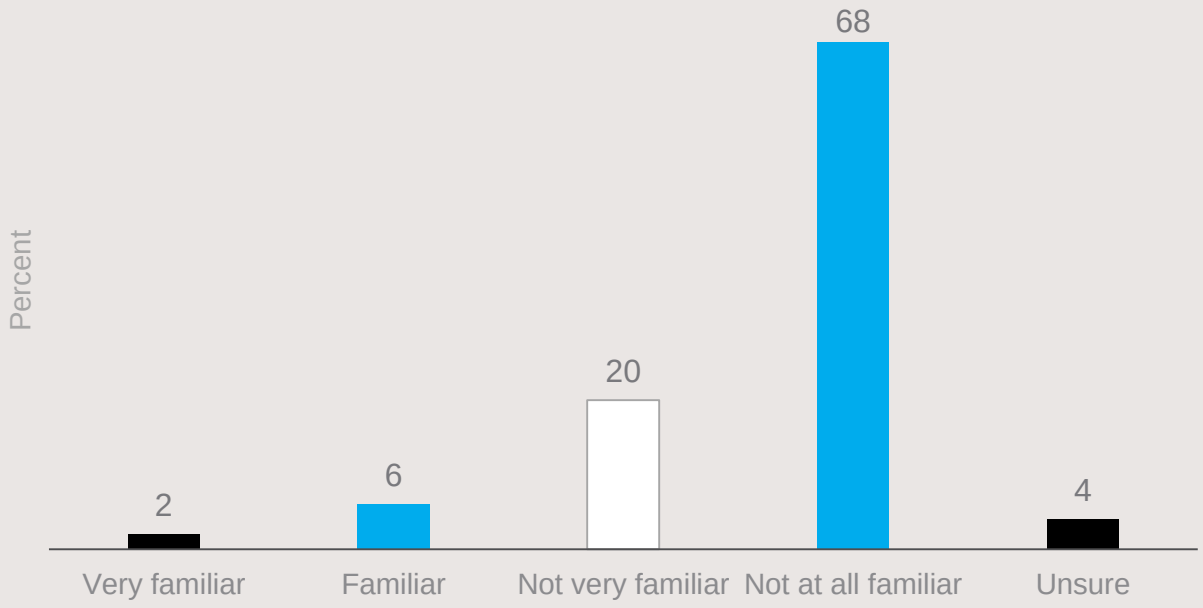


Little declared awareness of ECA

8% of Queensland household consumers say they are familiar with ECA.

- That puts Queensland clearly behind both Victoria (16%) and New South Wales (14%).

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



Essential. RESEARCH

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South Australia

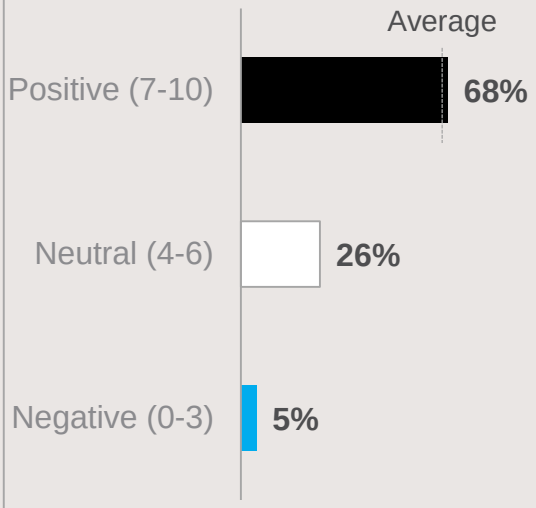
High satisfaction with competition

Although South Australian household consumers give only average satisfaction ratings for their electricity and gas services overall, they are relatively satisfied with the level of competition in the market.

- 68% are satisfied with the provision of electricity and gas services overall, which is comparable with the figures recorded in New South Wales (67%), Victoria and Queensland (both 66%), but behind Western Australia (73%).
- 48% are satisfied with the level of competition, however, which places South Australia second equal (with Victoria) of all the states and territories.

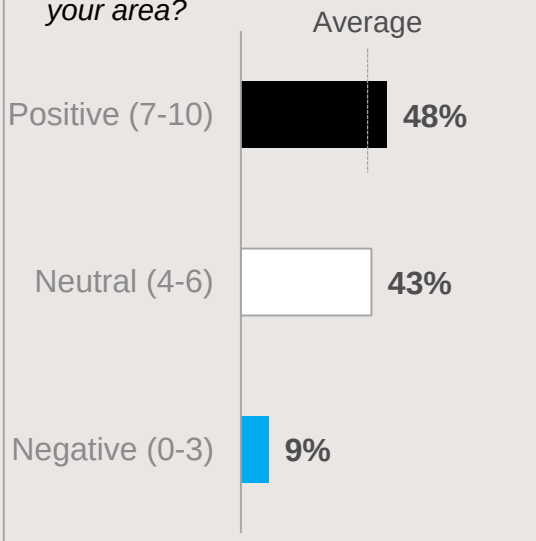
Overall satisfaction

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



Satisfaction with competition

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

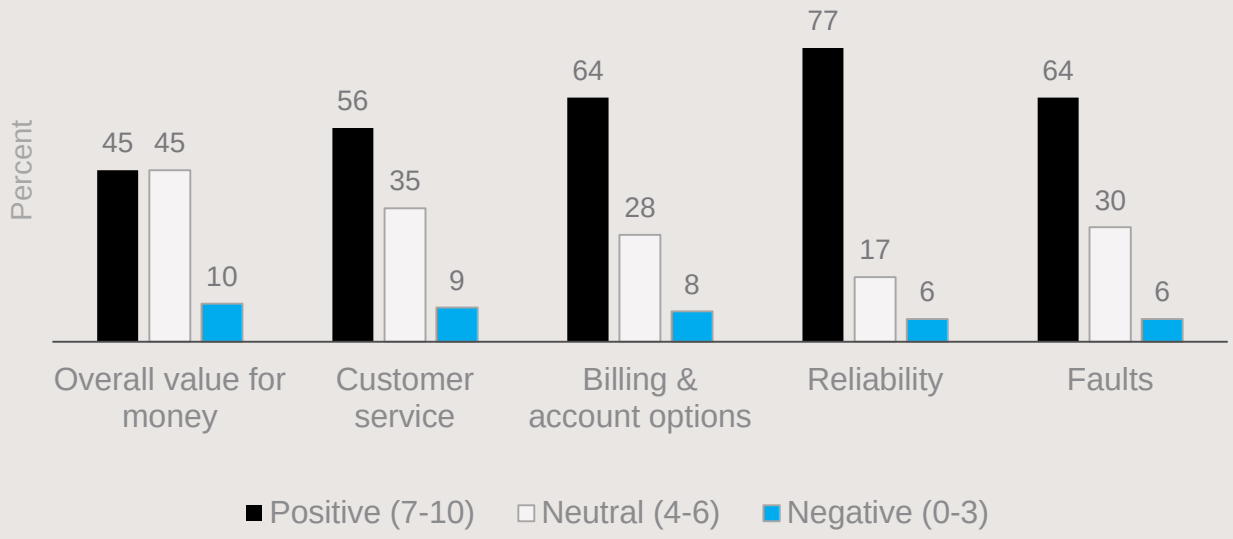


Good numbers for customer service

56% are satisfied with the customer service offered by their electricity company, the highest of any state or territories.

- This compares with 50% in Victoria and 38% in Tasmania.
- All other attributes on electricity are around the national average.

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



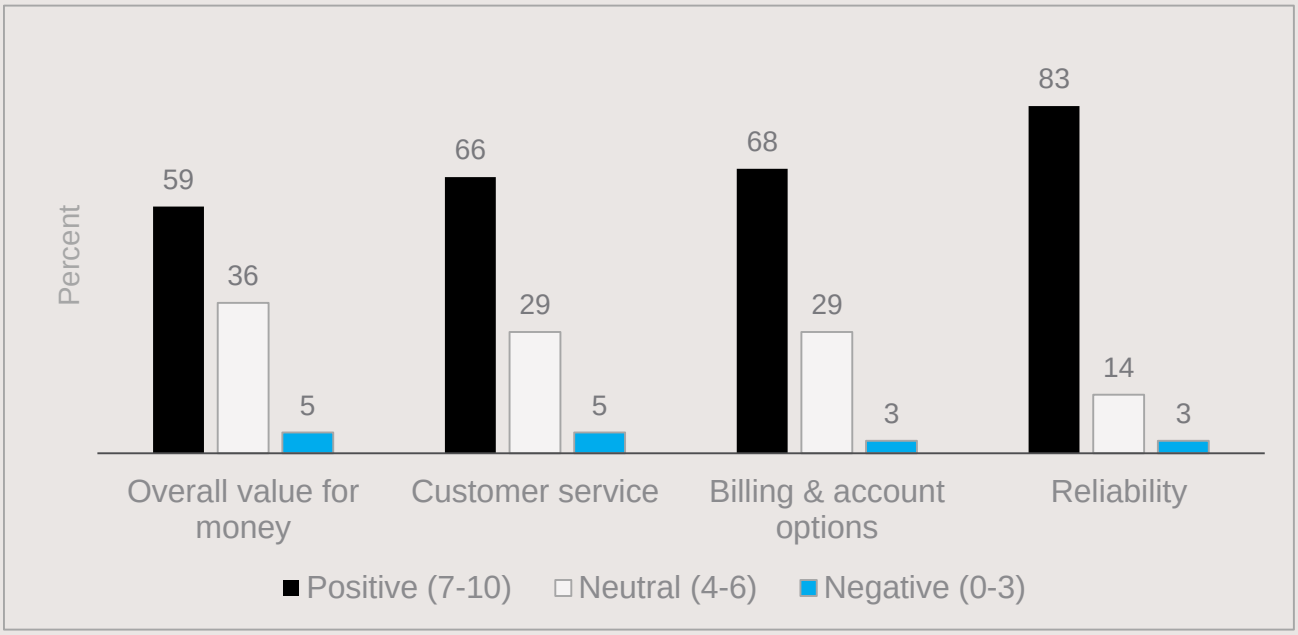
Average ratings for gas attributes

South Australian household consumers were around the national average for all the gas attributes.

- 59% are satisfied with the value for money of gas, behind Western Australia (66%) but ahead of Tasmania (49%) and the ACT (43%).

"How would you rate the [attribute]"

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



Base: South Australia consumers with gas (n=239)

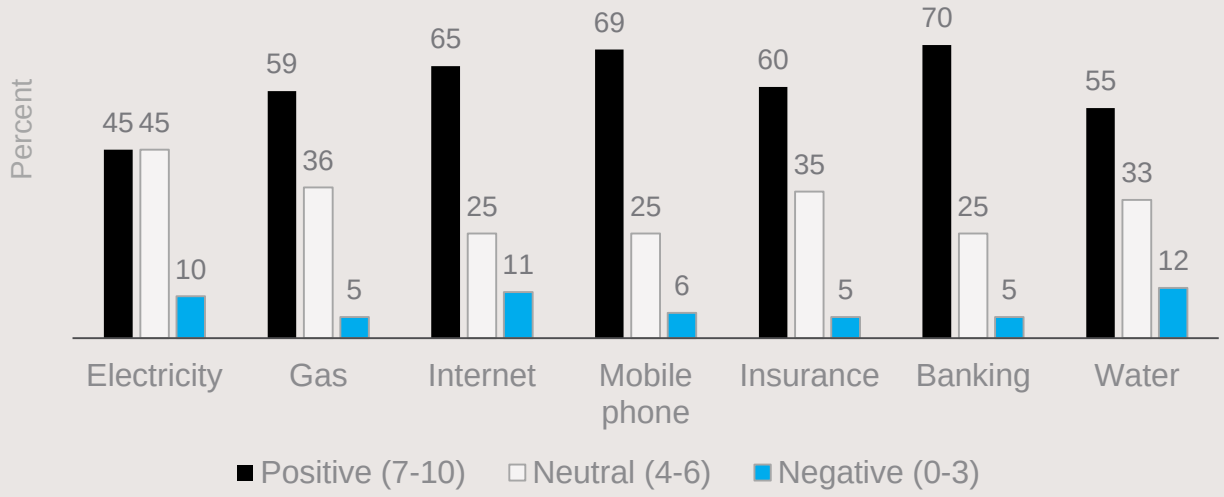
Lower satisfaction with water services

Although South Australians come in around the national average for electricity, gas and most other services, they give low ratings for water services.

- 55% are satisfied with the value for money of their water services, compared with 68% in Western Australia and the ACT.
- Only Tasmania (51%) is below South Australia for satisfaction with water 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'

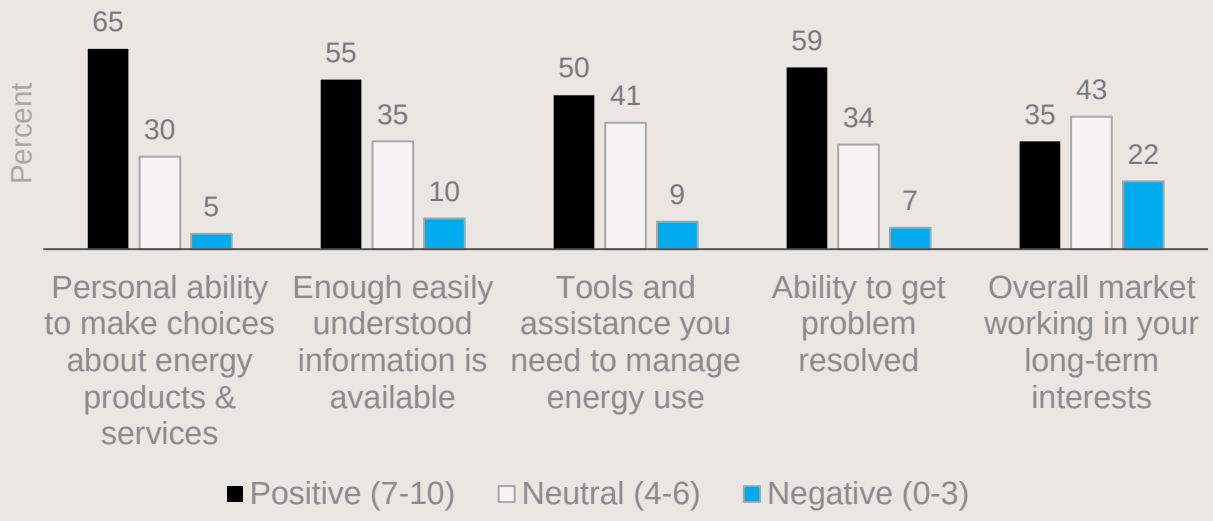


Fairly confident that information is available

55% of South Australian household consumers feel confident that there is enough easily understood information available for them to make decisions about energy products and services.

- Equal with Victoria, this is the highest for all the states and territories.
- Confidence ratings for the other areas are around the national average.

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



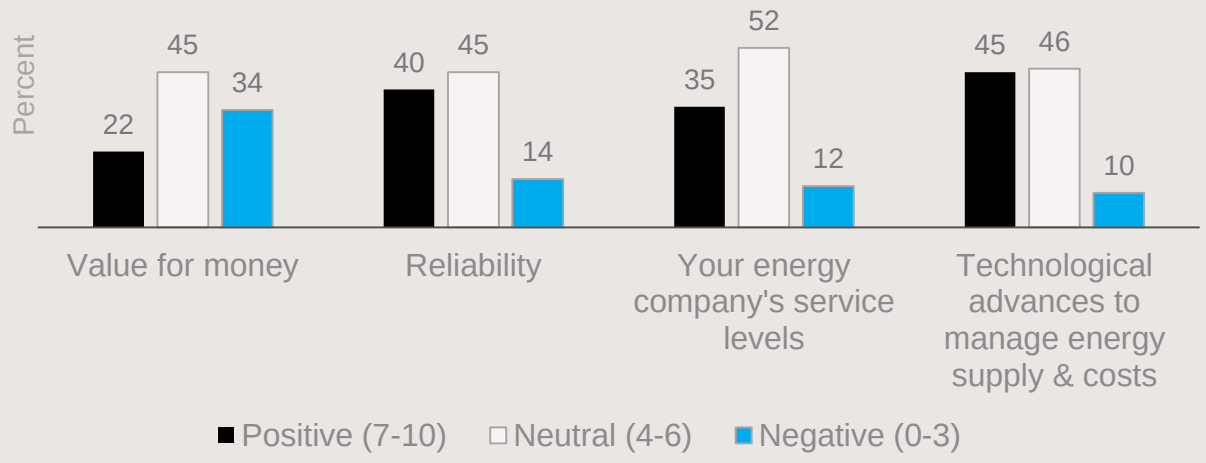
Less confidence market will deliver reliability

40% of South Australians expect that the market will deliver better outcomes on reliability, the lowest of all the states and territories.

- It compares with 57% in both Victoria and the ACT.
- South Australian household consumers are also less likely than Victorians to say they are confident the market will provide better outcomes on customer service.

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'

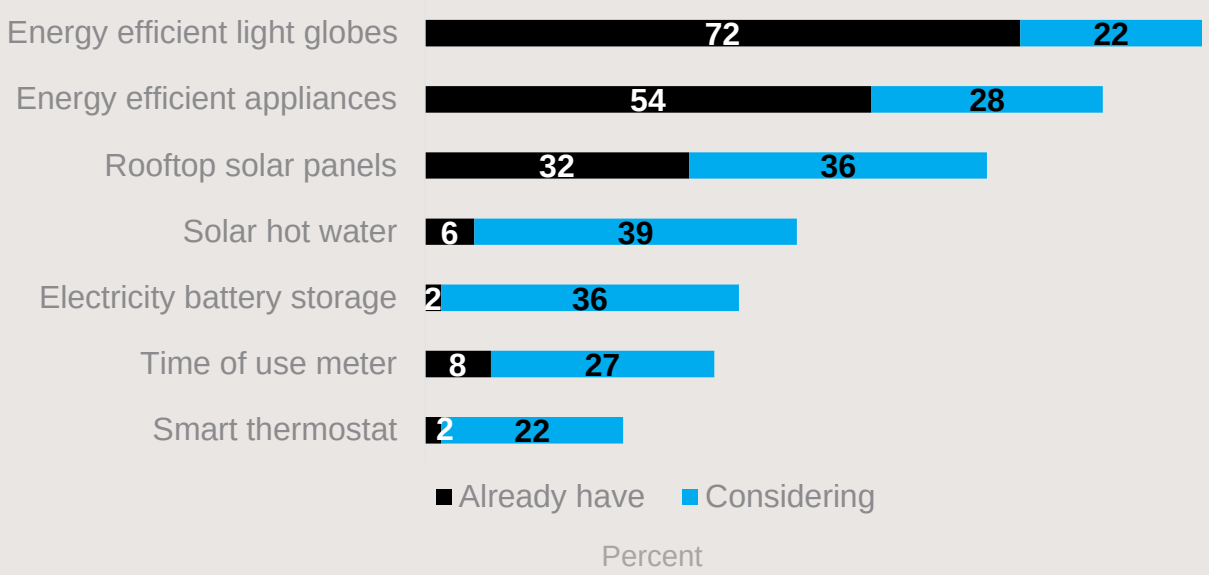


Considerable potential for rooftop solar panels

South Australia is alongside Queensland and Western Australia as the states where household consumers are the most likely to already have rooftop solar panels.

- South Australian household consumers are however more likely than those in Queensland and Western Australia to say they are considering rooftop solar for the future (36%, compared with 28% and 33% respectively).

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



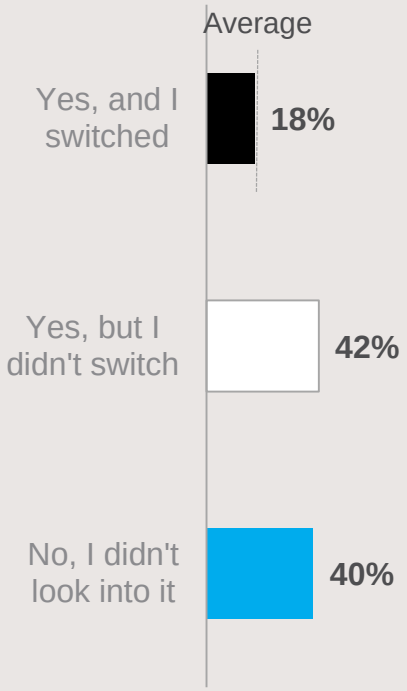
High numbers considering switching

Along with New South Wales and Victorian household consumers, South Australian household consumers are the most likely in Australia to have considered switching in the last 3 years.

- A total of 60% considered switching, with 18% actually doing so.
- The proportion of South Australians who considered switching actually doing so is lower than in either New South Wales or Victoria (36% compared with 40% and 39% respectively), meaning that more of those who looked at switching ended up deciding against.

Previous behaviour

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



Value for money less of an issue in South Australia

Although value for money remains the main reason for considering switching, it was a little less dominant in South Australia than in some other states.

- 35% said that they considered switching because they were dissatisfied with the value for money, compared with 42% in both New South Wales and Victoria.
- 26% said that they simply found a better deal elsewhere, compared with 31% in New South Wales.
- Instead, South Australians were a little more likely to say that they were either dissatisfied with faults, or that they were not dissatisfied but changed for unspecified reasons.

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

Base: South Australia household consumers who considered switching in the last 3 years (n=184).

Limited expectations seem to be a key barrier to switching.

31% of South Australian household consumers who have not considered switching simply say that they are happy with the deal they have now.

South Australian household consumers were relatively likely to mention:

- ‘Changing makes no difference’ (11% compared with 8% in New South Wales)
- ‘No particular reason’ (13% compared with 9% in New South Wales).

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

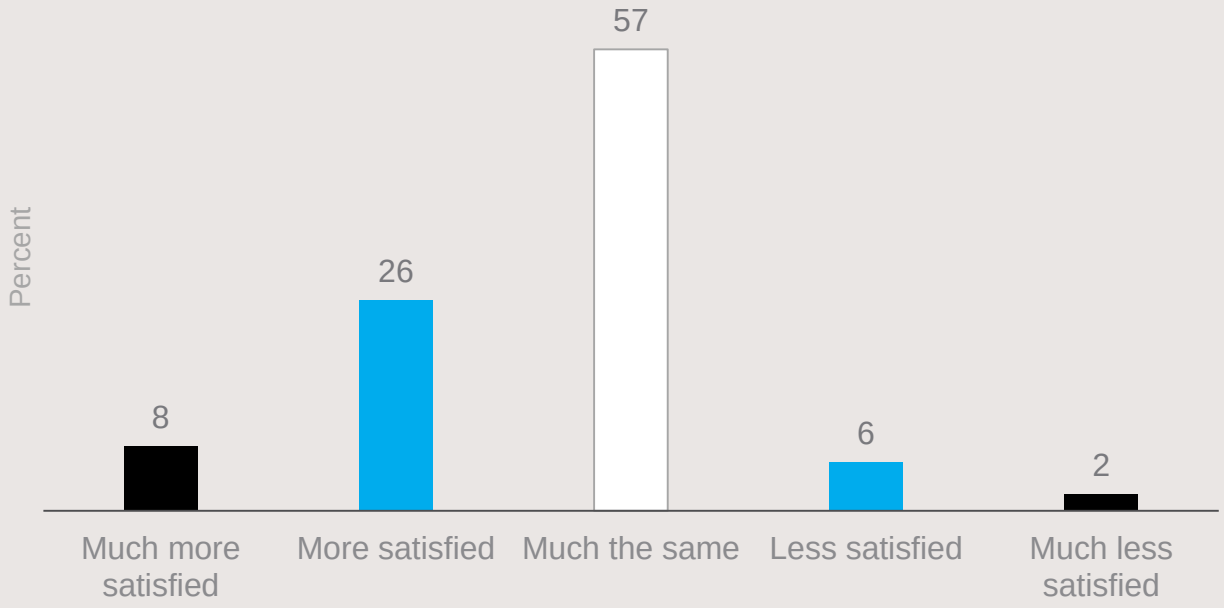
Base: South Australia household consumers who had not considered switching in the last 3 years (n=124)

Looking at switching has less impact for South Australians

57% of South Australian household consumers who considered switching said that it made no difference to their satisfaction.

- Along with Queensland, this is the highest for any state or territory.
- 34% said that looking made them more satisfied, which is less than in New South Wales or Victoria.

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



Base: WA household consumers who considered switching in the last 3 years (n=184)

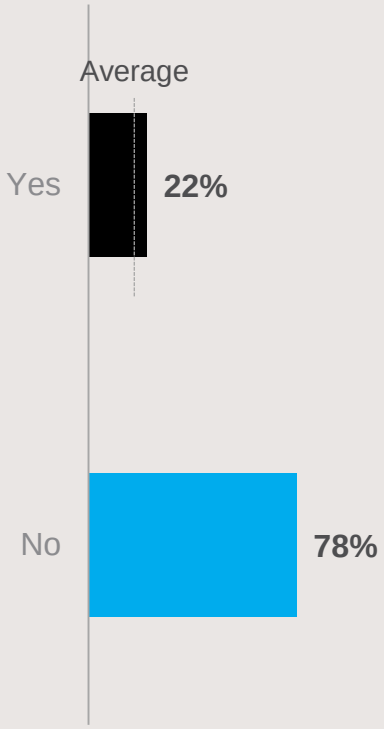
Open to switching

South Australian household consumers are the second most likely to be considering switching in the year ahead.

- 22% are considering switching, compared with 27% in Victoria but only 17% in New South Wales.

Future intentions

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

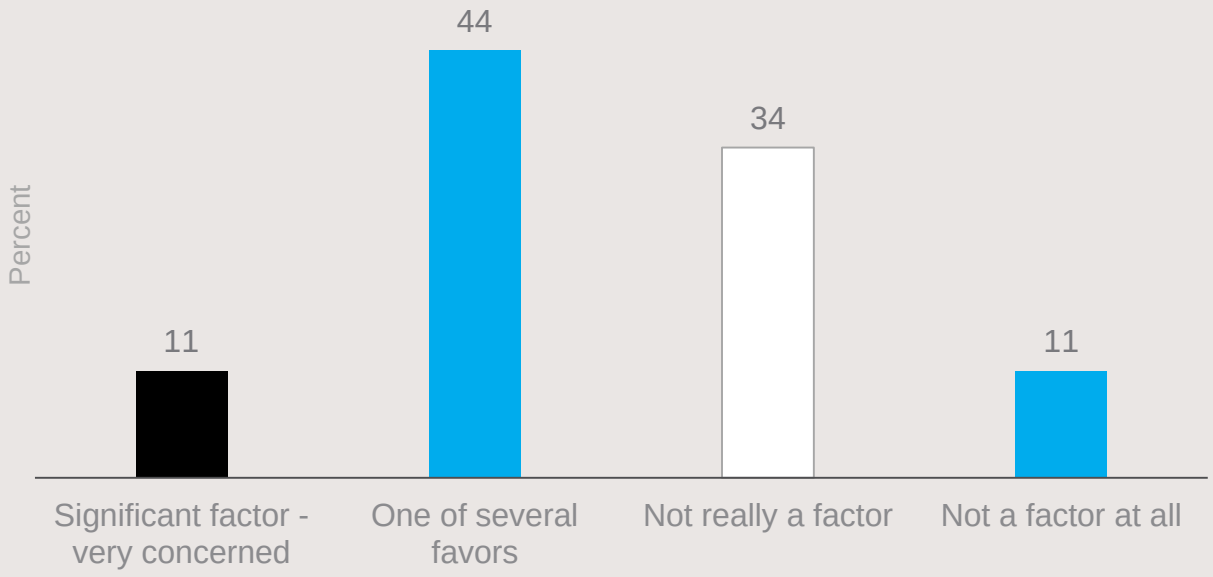


Moderate interest in the environment

A majority of South Australian household consumers claim they consider the environment when making decisions about energy products and services.

- 55% say that it is a factor they consider, including 11% who say it is one of the most significant factors (11%).
- This puts South Australia behind Western Australia (65%) and the ACT (60%), but ahead of Queensland (48%).

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

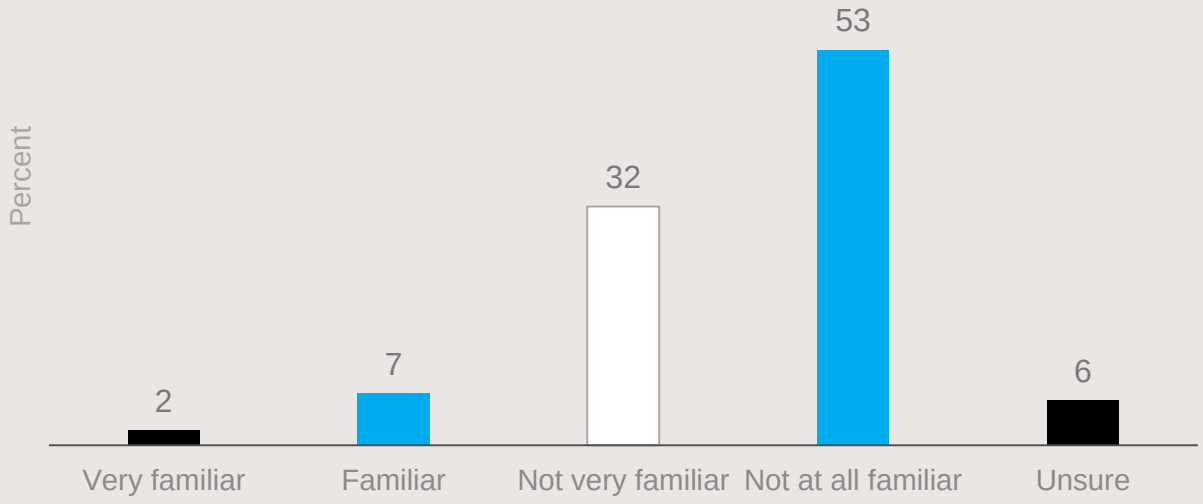


Awareness of ECA still low

Declared familiarity with ECA is lower in South Australia than in either New South Wales or Victoria.

- 9% of South Australians claim to be familiar with ECA, compared with 16% in Victoria and 14% in New South Wales.

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



Tasmania

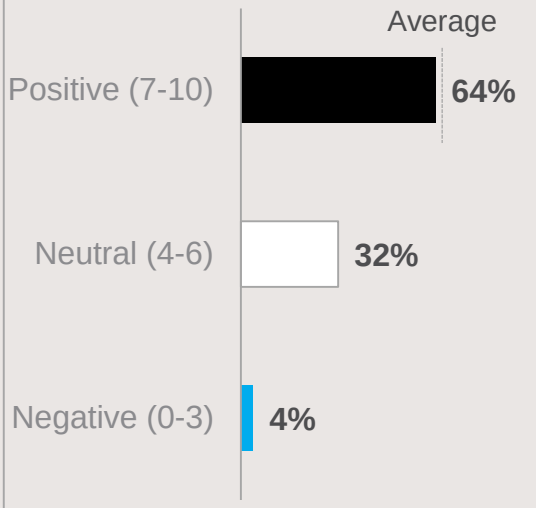
Dissatisfaction with competition and value for money seems to have affected overall satisfaction.

64% of Tasmanian household consumers are satisfied with the provision of electricity and gas services overall.

- Although this variable is relatively consistent across the states and territories, Tasmania does come through as the lowest (especially compared with Western Australia on 73% and ACT on 72%).
- Only 16% are satisfied with the level of competition in the state, compared with a next lowest result of 23% satisfied in the ACT.

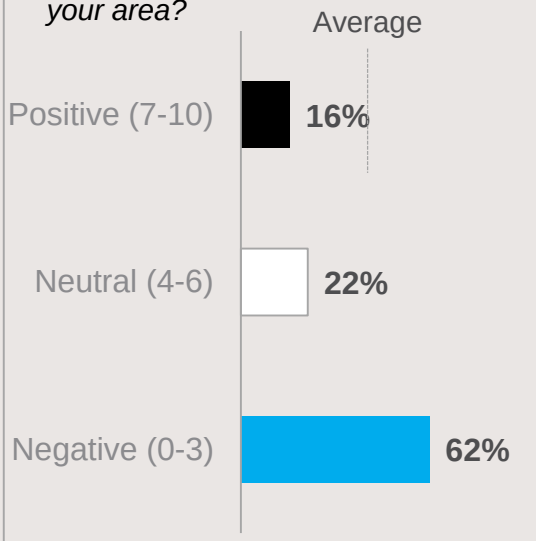
Overall satisfaction

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



Satisfaction with competition

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



Very low satisfaction with value for money of electricity.

Only 29% of Tasmanian household consumers are satisfied with the value for money they get for electricity.

- The next lowest state is Queensland, with 43% satisfied.
- Tasmania also has the lowest Net Promoter Score – it is -38%, made up of 14% advocates and 52% detractors.

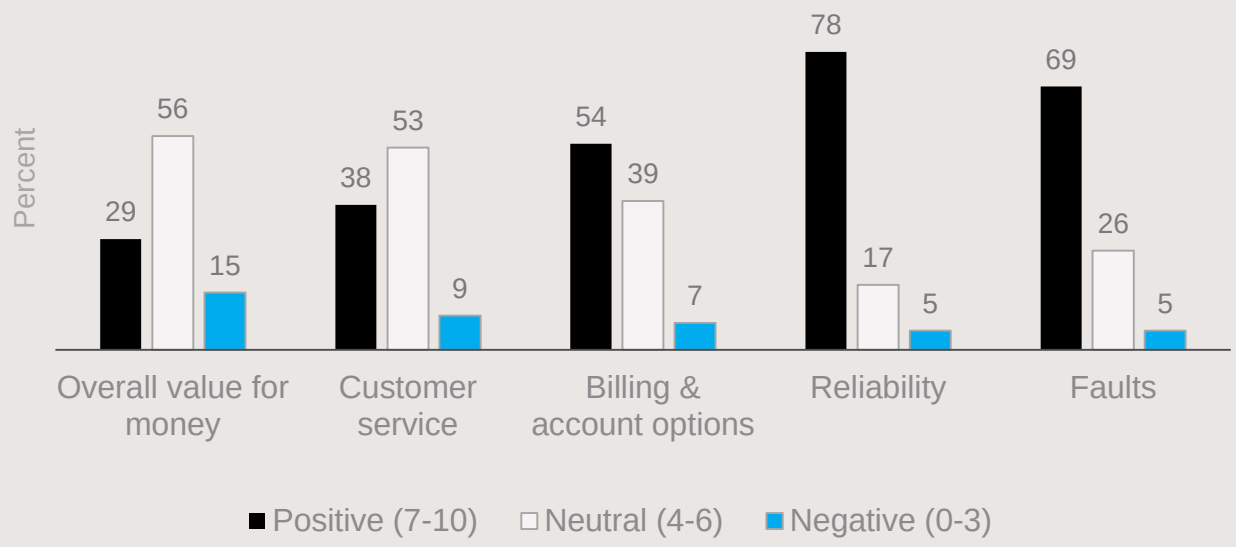
On the other hand, the number who are actually dissatisfied is not especially high, as more people are neutral.

- 15% of Tasmanians say they are dissatisfied, compared with 16% of Queenslanders.
- 56% of Tasmanians give neutral ratings, compared with 41% of Queenslanders.

Tasmanians are also less satisfied with the customer service and billing systems of their electricity providers.

"How would you rate the [attribute]"

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



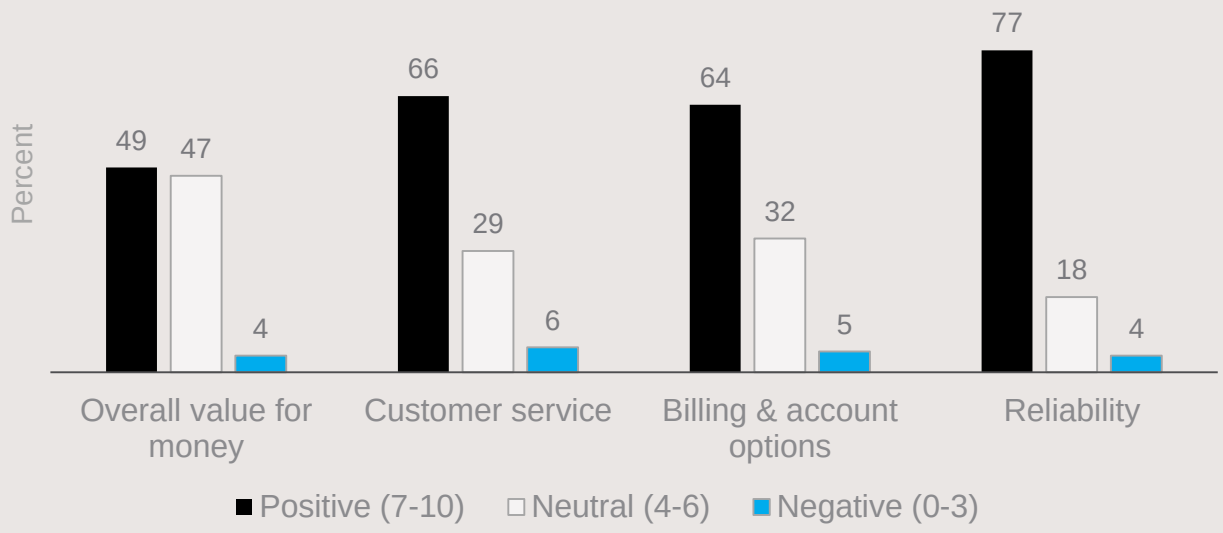
Fairly low ratings on gas

The number of Tasmanians with gas (n=70) is only sufficient for indicative analysis, but there are signs that some of the dissatisfaction with electricity has spread across into gas.

- 49% are happy with the value for money of gas, compared with 59% in South Australia and 58% in both New South Wales and Victoria.
- 77% are satisfied with the reliability of their gas services, compared with 91% in Western Australia.

"How would you rate the [attribute]"

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



Base: Tasmanian consumers with gas (n=70)

INDICATIVE ONLY: SMALL SAMPLE SIZE

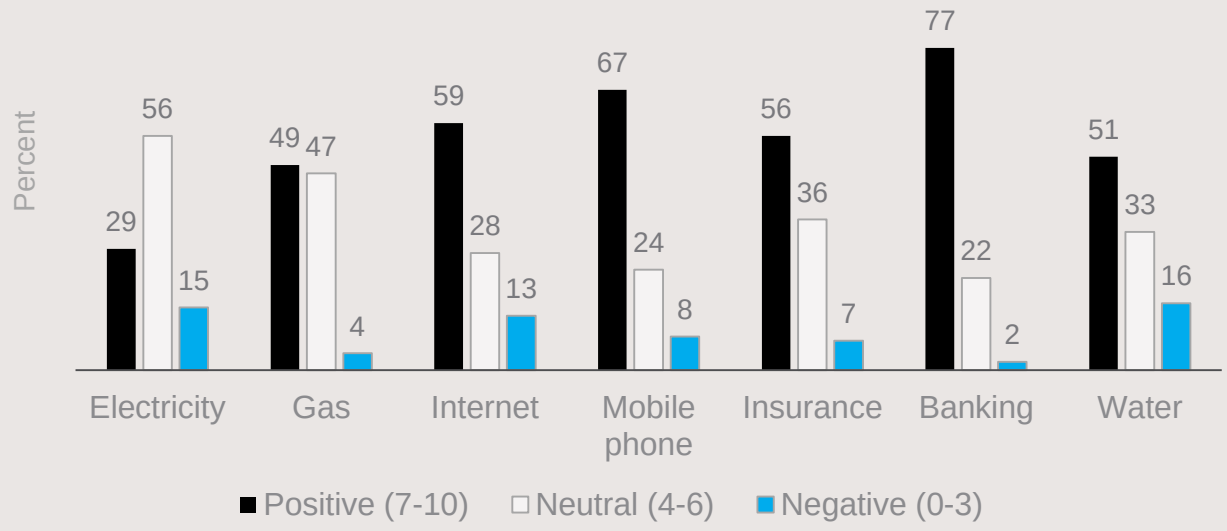
Lower satisfaction with electricity shared with water, but not other services

The substantially lower satisfaction with the value for money for electricity also comes through for water services.

- 51% of Tasmanian household consumers say that they are happy with the value for money they get for water services, compared with 68% in the ACT and 67% in Victoria.
- Tasmanians are, however, more likely to be satisfied with the value for money of banking services (77%, the highest of any state or territory).

"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'



Tasmanians clearly less confident

Confidence ratings from Tasmanian household consumers are generally lower than in other states

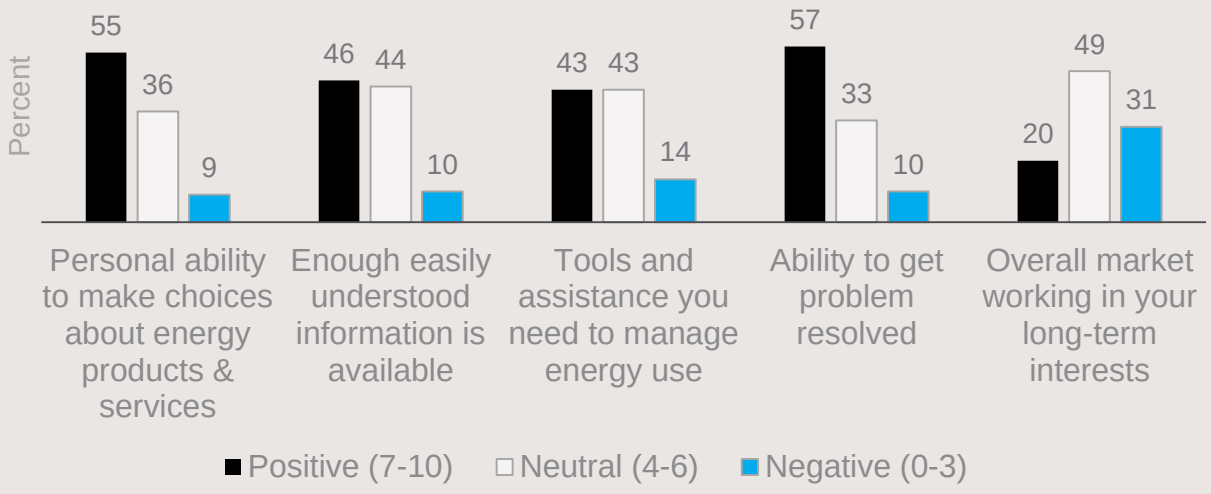
- 55% say that they are confident in their own abilities, compared with 69% in New South Wales.
- 43% are confident that they have the tools and assistance needed to manage their energy use and costs, compared with 54% in Western Australia and 52% in Victoria.

The most important of these differences is arguably the level of confidence that the market is working in the interests of consumers like them.

- Just 20% of Tasmanian household consumers feel confident that this is the case, compared with 39% of Victorians.

How would you rate the [attribute]

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



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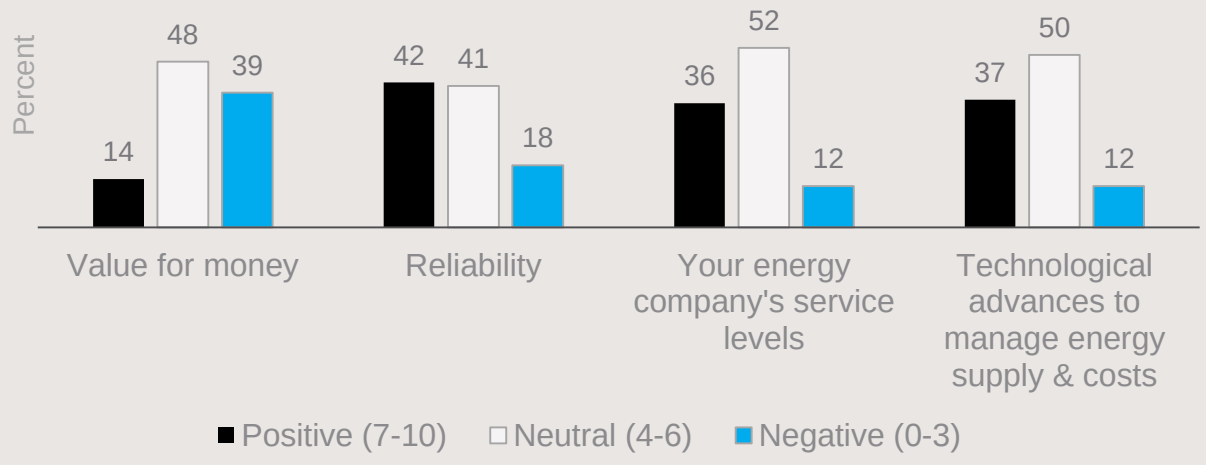
Little confidence in market outcomes

Few Tasmanian household consumers believe that the market in their state will provide better outcomes in five years time.

- Just 14% believe that it will provide better outcomes on value for money, compared with 29% in Victoria
- 36% think that it will provide better customer service, compared with 46% in Victoria.
- 37% are confident it will provide better outcomes for technology, compared with 54% in Victoria and 53% in Western Australia.

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'

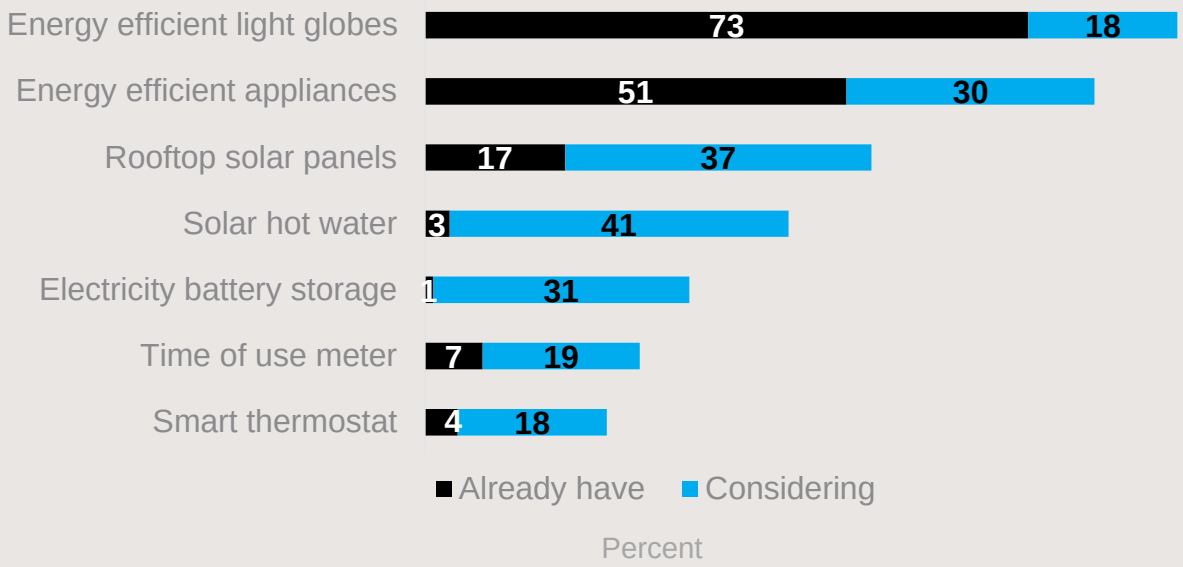


Good potential for solar hot water

Although only 3% of Tasmanian household consumers have solar hot water at the moment, a substantial proportion would consider it in the future.

- 41% of Tasmanians do not have solar hot water but would consider it in the future, the second most in any state or territory.
- Tasmanians are, however, relatively unlikely to be considering time of use meters (19%, compared with 35% in ACT).

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



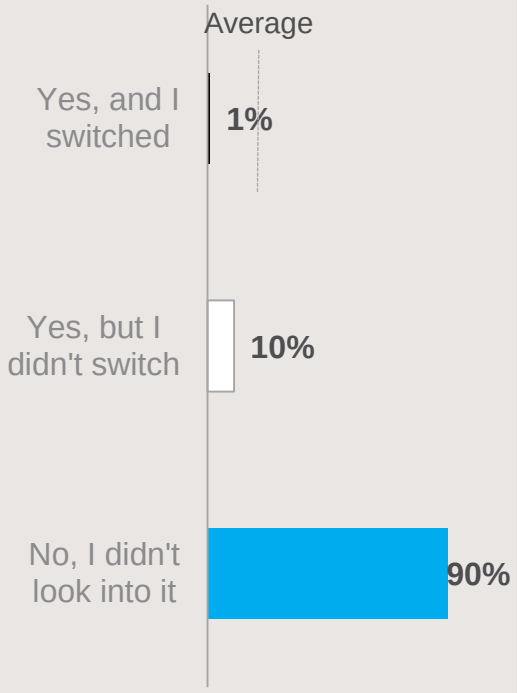
Few even consider switching plans

The monopoly on energy retail seems to have contributed to Tasmanian household consumers being reluctant to look at even switching plans.

- 90% of Tasmanians said that they had not looked at switching energy companies or energy plans in the last 3 years.
- Even most of those who have considered switching plans did not end up doing so, suggesting that the range of plans available did not attract them.
- These numbers mean that the sample sizes for the questions on reasons for considering switching and impact on levels of satisfaction are too small for robust analysis.

Previous behaviour

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



Lack of alternatives is key barrier

70% of Tasmanian household consumers who had not looked at switching said that this was because they were not aware of any alternatives.

- This again suggests that they were not aware of alternative plans from their retailer, not just that there was only one retailer available.

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

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

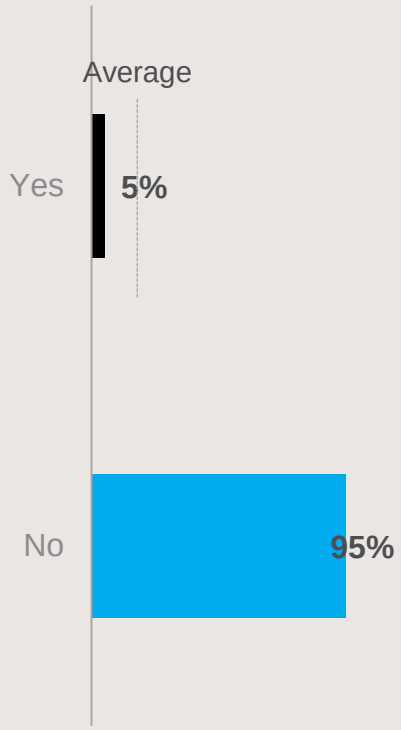
Little interest in switching

Just 5% of Tasmanian household consumers say that they are considering switching energy companies or plans in the year ahead.

- This again suggests that they do not see clear differences between the plans offered by their energy retailer.

Future intentions

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

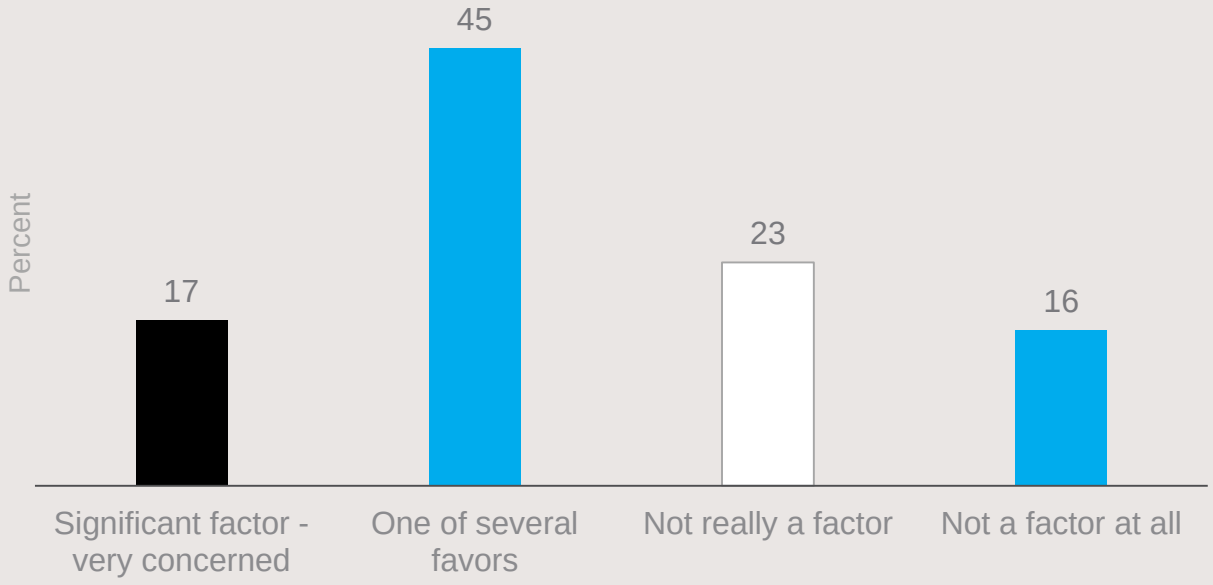


Relatively conscious of the environment

Tasmanian household consumers are relatively likely to claim that they consider the environment when making decisions about energy products and services.

- 17% say that it is a very significant factor, while 45% say that it is one of several factors.
- The total of 62% who say that the environment is a factor they consider is therefore second only to Western Australia (65%) as the highest in Australia.

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

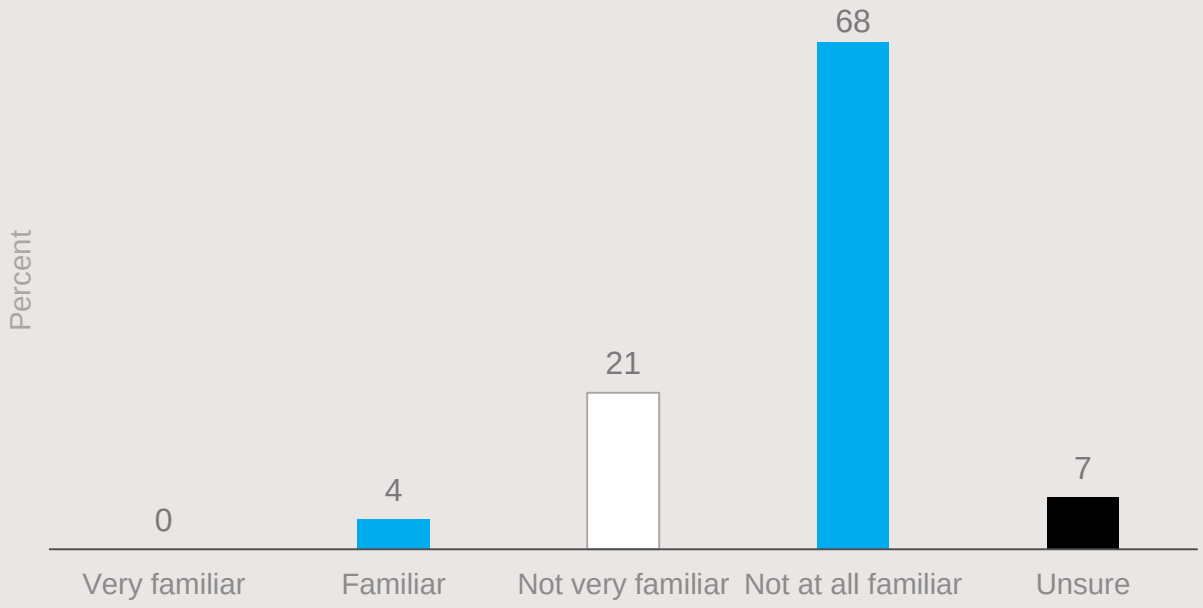


Negligible awareness of ECA

Few Tasmanian household consumers claim to be aware of ECA.

- Just 4% say that they are familiar with ECA, compared with 16% in Victoria and 14% in New South Wales.

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



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Australian Capital Territory

Highest overall ratings despite low satisfaction with competition

ACT household consumers have the second highest overall satisfaction ratings.

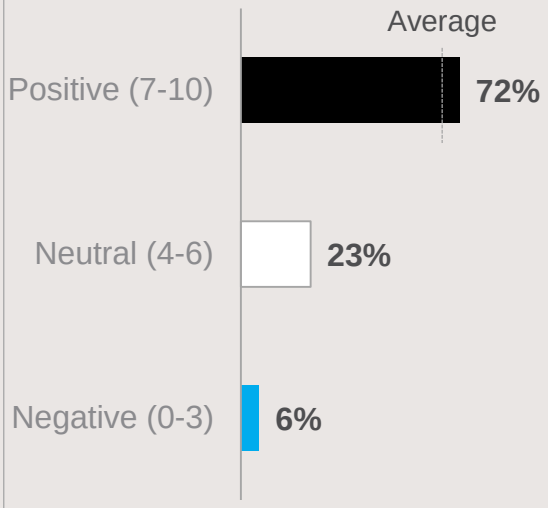
- 72% are satisfied with the provision of their electricity and gas services overall, behind only Western Australia (73%).

Less than a quarter, however, are satisfied with the level of competition in the ACT energy market.

- 23% are satisfied with the level of competition, making ACT the second lowest of the states and territories (ahead of only Tasmania on 16%).

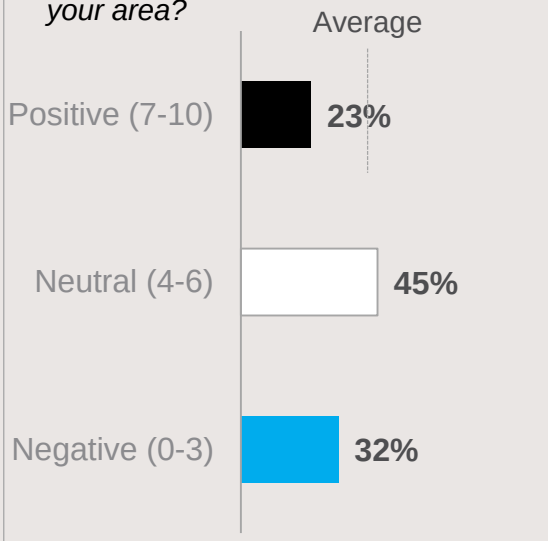
Overall satisfaction

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



Satisfaction with competition

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

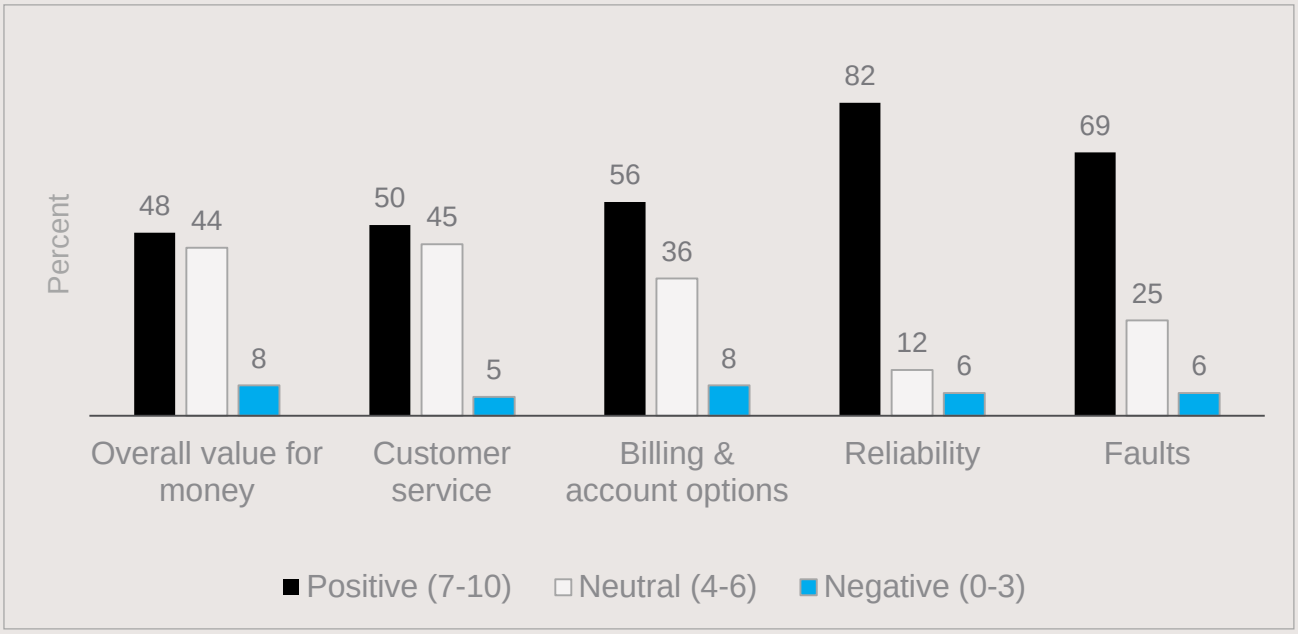


Good ratings for electricity reliability and faults, and ok for value for money

ACT household consumers give above average ratings for the reliability of their electricity and the way faults were handled.

- 82% are satisfied with the reliability, the highest of all the states and territories.
- 69% are happy with the way faults were handled, behind Western Australia and Queensland but clearly ahead of both New South Wales and Victoria.

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

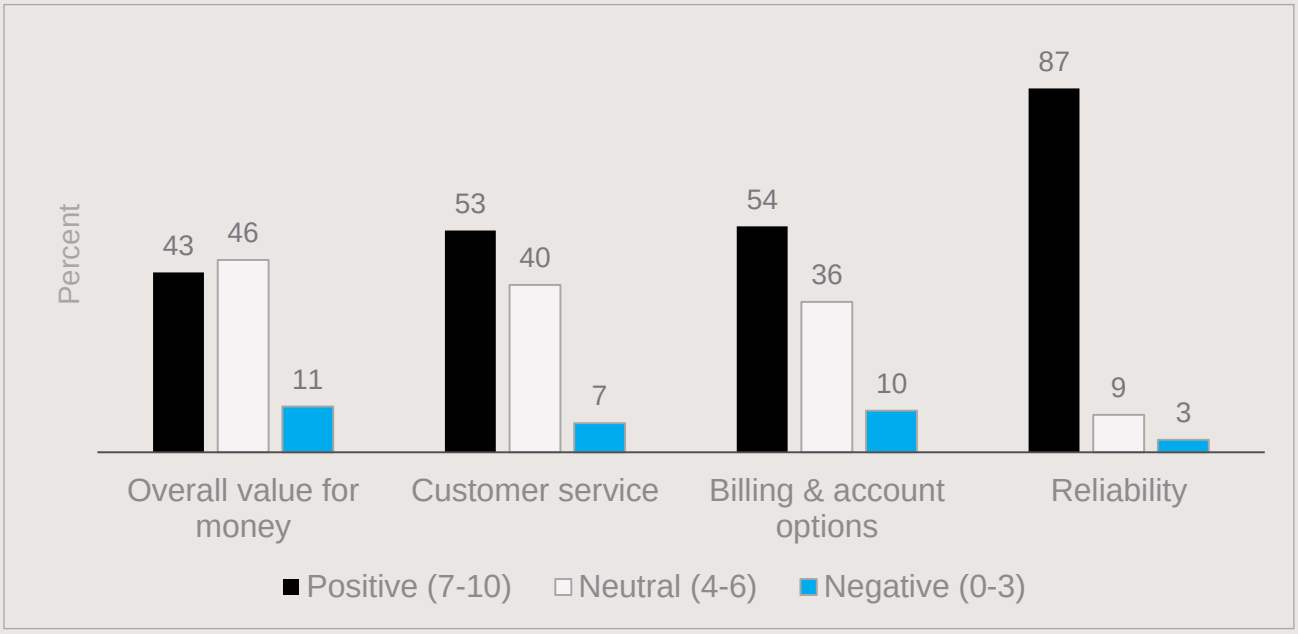


Low ratings for gas

ACT household consumers give relatively low ratings for gas services, and are the lowest of all the states and territories on four out of the five measures.

- 43% are satisfied with the overall value for money, compared with a next lowest rating of 49% (Tasmania)
- 53% are satisfied with the customer service, with the next lowest rating being 60% (Victoria)
- 54% are happy with the billing and accounts options, compared with the next lowest of 61% (Victoria)

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



Base: ACT consumers with gas (n=160)

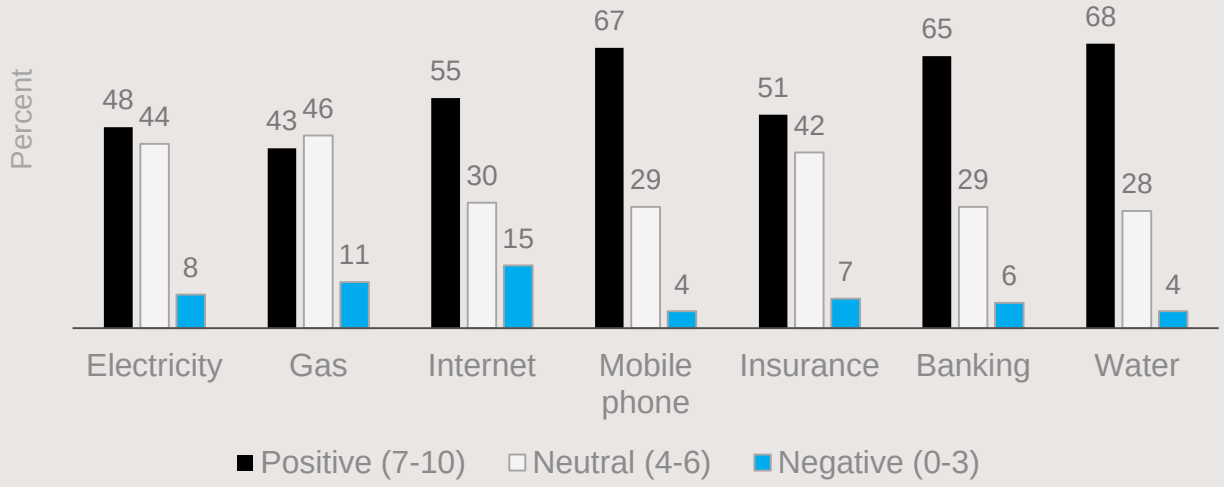
ACT is the only state or territory where gas rates lower than electricity.

While the value for money rating for electricity is fairly high relative to the other states and territories, the rating for the value for money of gas is relatively low.

- ACT household consumers also give relatively low ratings to the value for money of internet services, insurance and banking, but are the equal highest for value for money of water.

"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'



Little confidence in information, tools or that the market will work in their interests

Information and tools look to be particular problems in ACT.

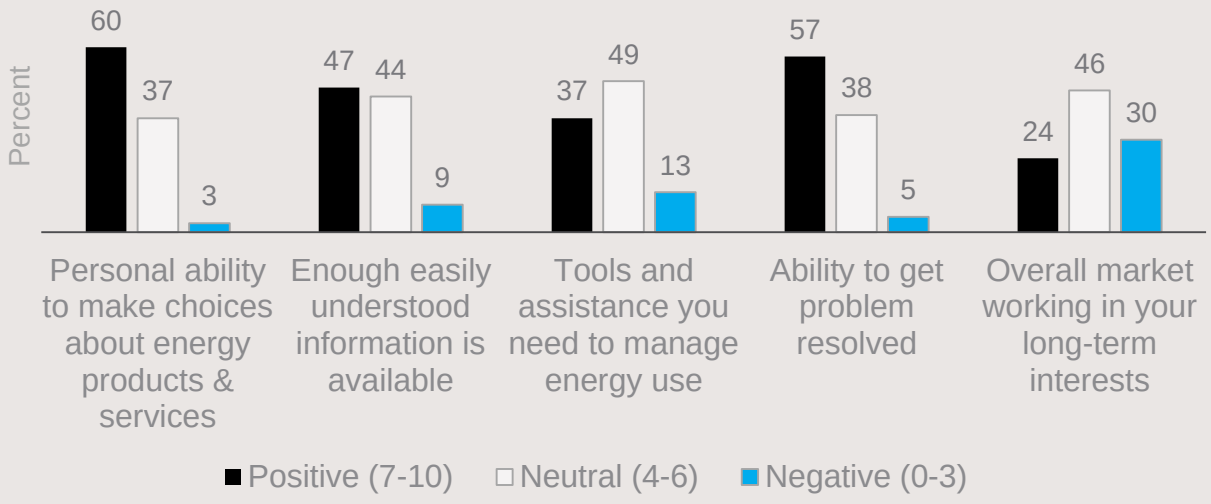
- 47% of ACT household consumers are confident that there is enough information, compared with 55% in both New South Wales and South Australia.
- 37% are confident that they have the tools and assistance they need to manage energy use and costs, compared with 54% in Western Australia.

Perhaps due to their low satisfaction with the levels of competition, ACT household consumers are less likely to feel confident that the market will work in their interests.

- 24% of ACT household consumers feel confident in this, ahead of only Tasmania (20%).

How would you rate the [attribute]

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



Essential. RESEARCH

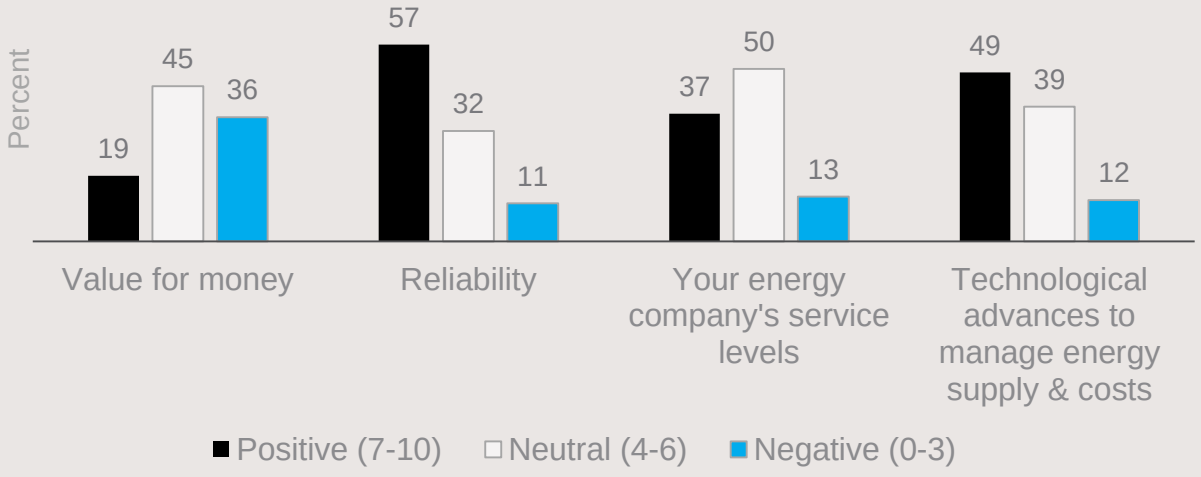
Confident in reliability, but less certain in other areas

ACT household consumers are above average for reliability, but marginally below average in other areas.

- 57% are confident that the market will deliver better reliability, equal with Victoria as the highest of the states and territories.
- 19% expect better outcomes on value for money (the second lowest) and 37% expect better customer service levels (the third lowest)

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'

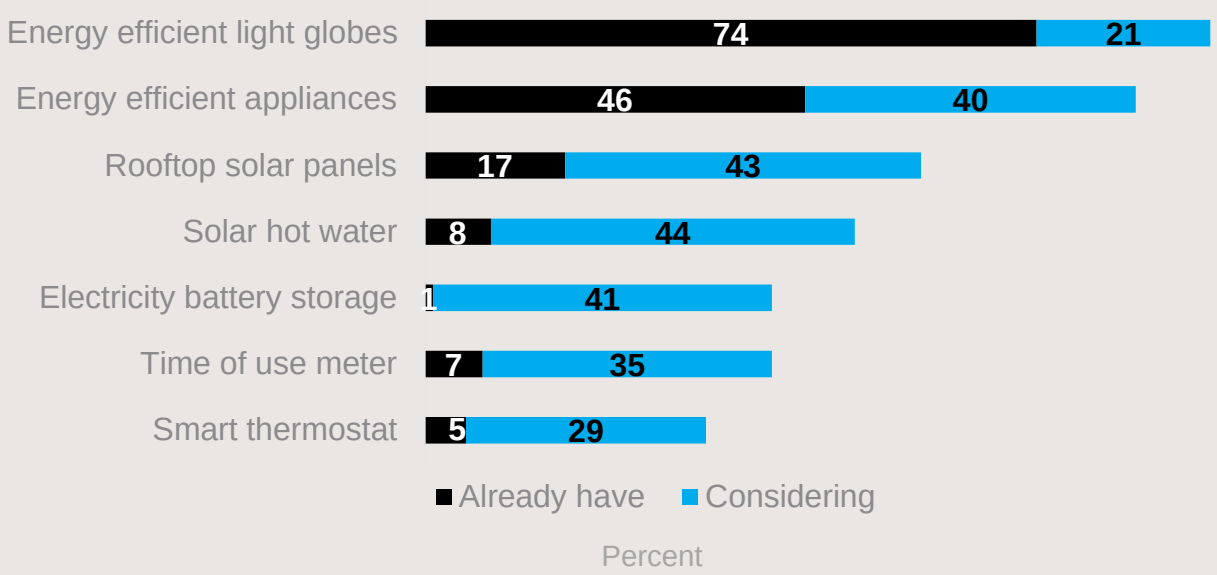


Open to trying new technologies.

Although few report having solar energy systems or time of use meters, ACT household consumers are the most likely to consider many of these technologies.

- 43% do not currently have rooftop solar panels but are considering them and 44% are in the same situation for solar hot water. In both cases that is the most for any state or territory.
- ACT household consumers are also more likely to be considering electricity battery storage (41%) and / or time of use meters (35%).

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



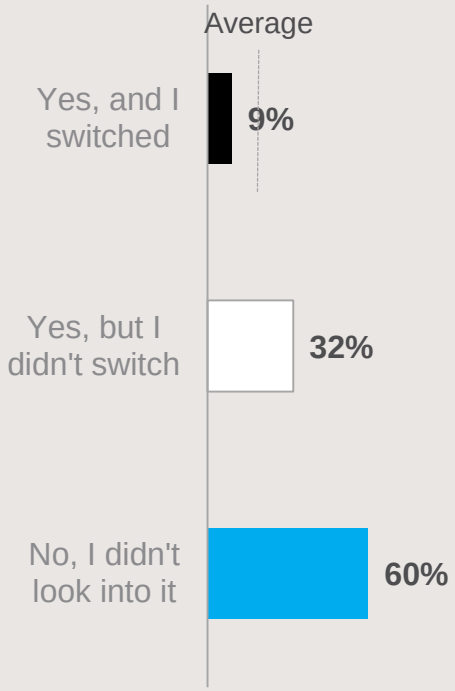
Little consideration of switching

41% of ACT household consumers have considered switching in the last three years.

- This total is similar to the result in Western Australia.(38%)
- 9% have actually switched, which is clearly behind Western Australia (15%).

Previous behaviour

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



Value for money still the key

The small sample of ACT household consumers who had considered switching (n=84) generally cited value for money as the reason for doing so.

- 42% said that they were dissatisfied with the value for money they were receiving.
- 29% said that they were not dissatisfied but found a better deal elsewhere.
- 25% said that they were not dissatisfied but that they changed for other reasons, the highest for any state or territory.

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

Base: ACT household consumers who considered switching in the last 3 years (n=84).

INDICATIVE ONLY: SMALL SAMPLE SIZE

Lack of alternatives

ACT household consumers who had not switched were less likely than either Tasmanians or Western Australians to say that there were no alternatives available.

- This suggests that they were aware of alternatives, but were not especially interested in pursuing them.
- 11% said switching would make no difference, higher than both Tasmania and Western Australia.
- 26% said that they were happy with the deal they had now, higher than both those two states.

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

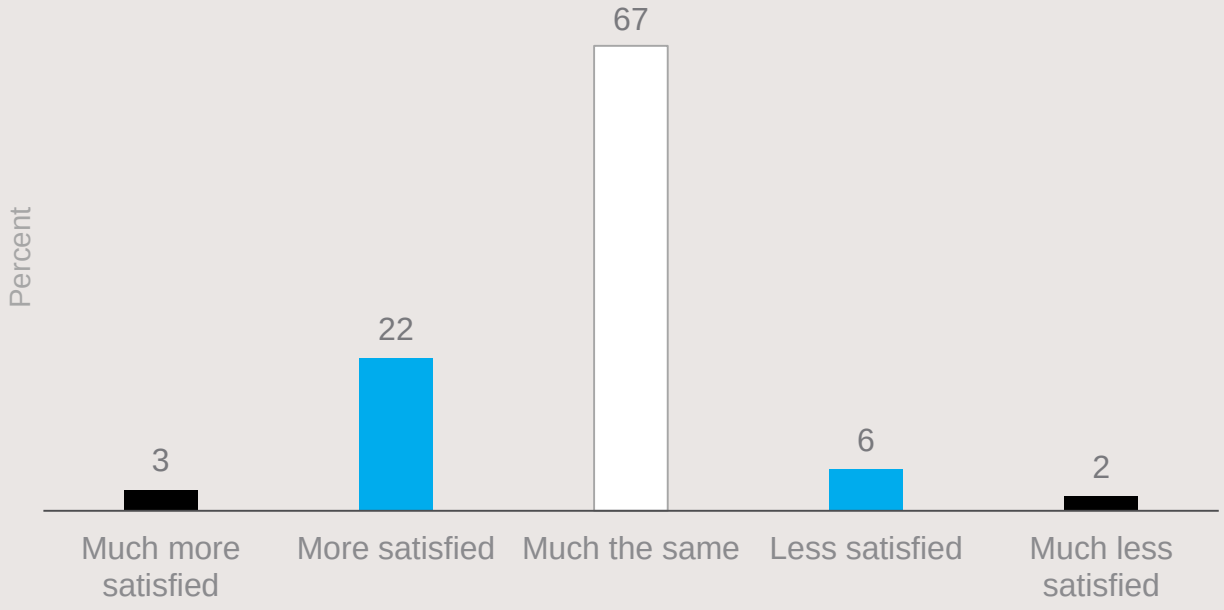
Base: ACT household consumers who had not considered switching in the last 3 years (n=124)

Exploring the options had little impact on satisfaction

The small sample of ACT household consumers who considered switching generally reported that it made no difference to their levels of satisfaction.

- 67% said that it made no difference, clearly the highest of all the states and territories.
- 25% were more satisfied, the lowest of all the states and territories.

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



Base: ACT household consumers who considered switching in the last 3 years (n=84)

INDICATIVE ONLY: SMALL SAMPLE SIZE

Essential. RESEARCH

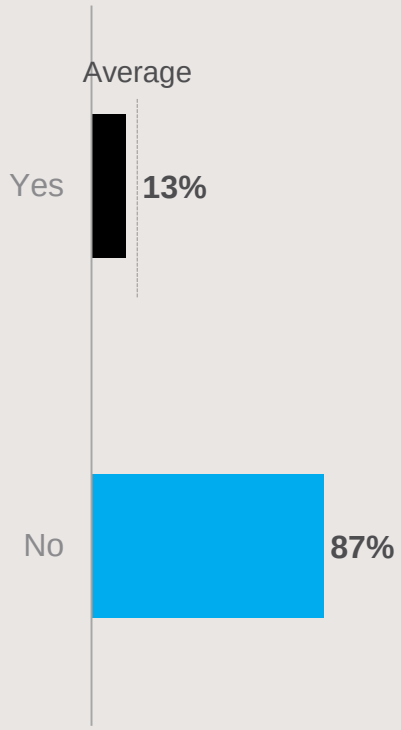
ACT consumers not really looking at switching

ACT household consumers are similar to Western Australians not just in terms of their previous switching behaviour, but in their intentions to switch in the year ahead.

- 13% say that they intend to switch in the year ahead, compared with 14% in Western Australia.
- ACT household consumers are therefore more likely to consider switching than Tasmanians, but less likely to consider it than New South Wales or Victorian consumers.

Future intentions

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

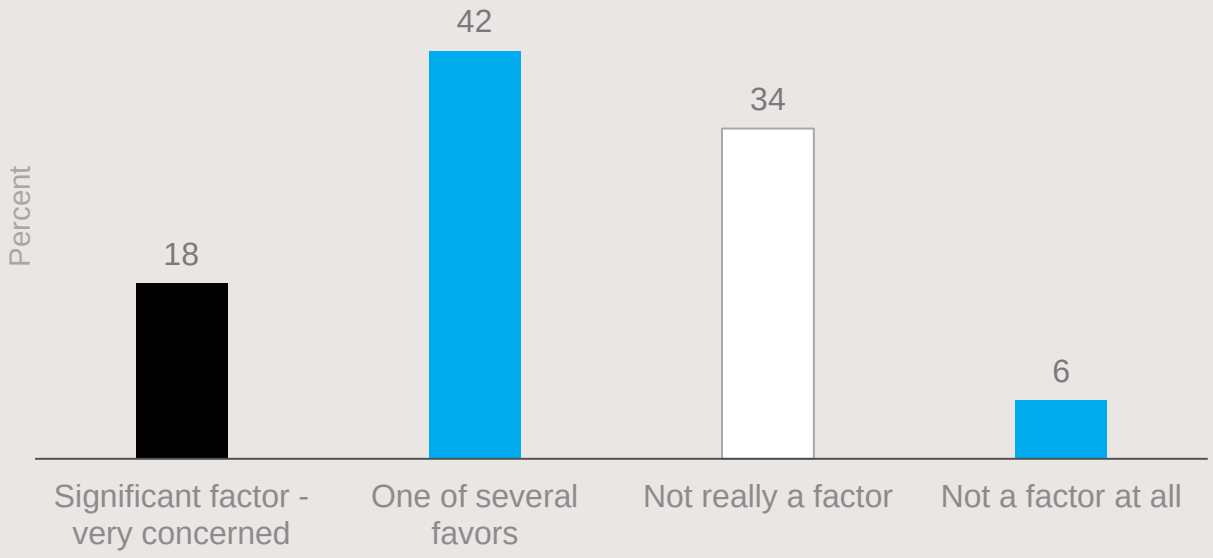


Fairly likely to consider the environment

60% of ACT household consumers say that the environment is one of the factors they consider in their decisions on energy products and services.

- This puts ACT household consumers behind Western Australians (65%) but ahead of New South Wales consumers (54%).
- 18% of ACT household consumers say that it is the main factor they consider, which is higher than in Queensland (10%), South Australia (11%) or Victoria (12%).

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

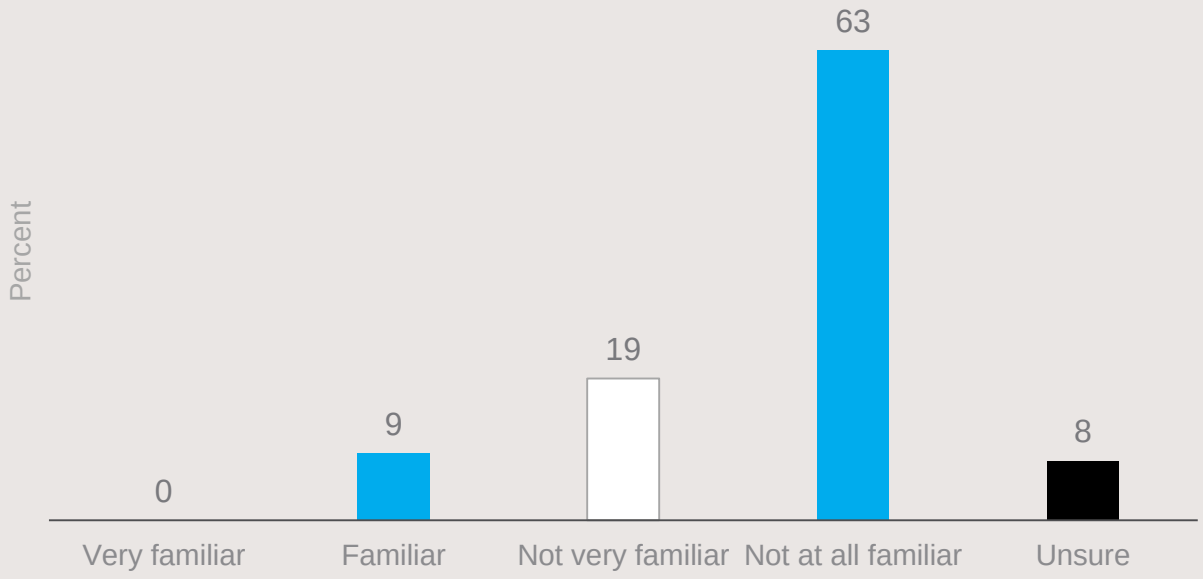


Familiarity with ECA still low

Declared familiarity with ECA amongst ACT household consumers is lower than in New South Wales or Victoria, but higher than in Tasmania.

- 9% say that they are familiar with ECA, compared with 14% in New South Wales, 16% in Victoria and just 4% in Tasmania.

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



Essential. RESEARCH

Western Australia

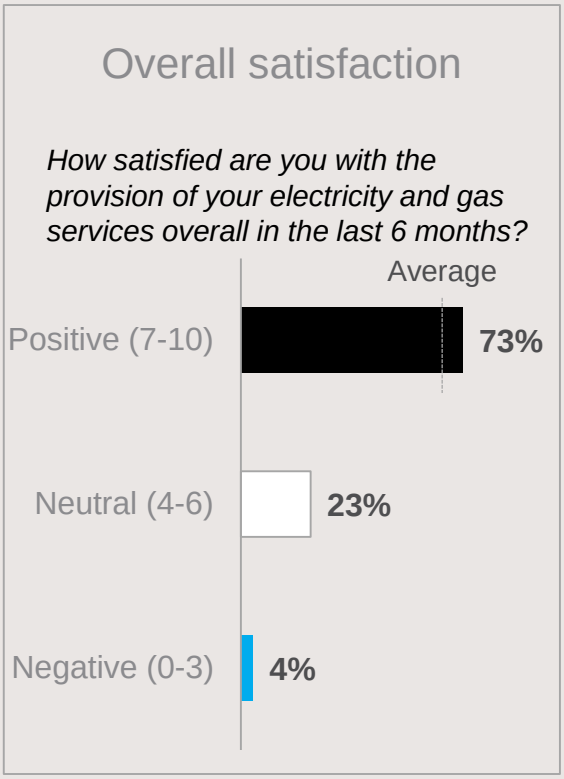
Highest overall satisfaction despite dissatisfaction with competition

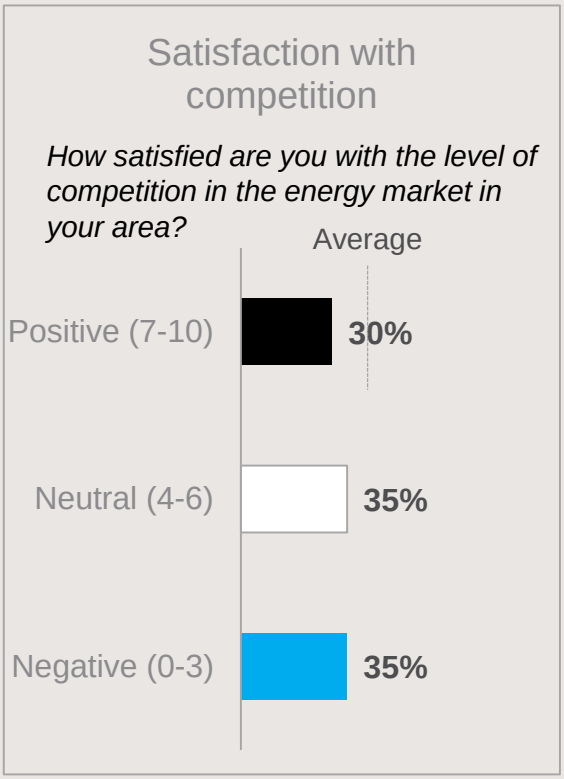
Western Australian household consumers have the highest overall satisfaction with the provision of electricity and gas services.

- 73% say that they are satisfied.
- Although that is only just ahead of the ACT (72%), it is further ahead of New South Wales (67%), Victoria (66%) and Queensland (66%)

This overall satisfaction occurs despite the fact that they are less satisfied with the competition in their energy market.

- 30% are satisfied, compared with 48% in New South Wales and 52% in Victoria.
- WA is ahead of only the ACT (23%) and Tasmania (26%) on this measure.





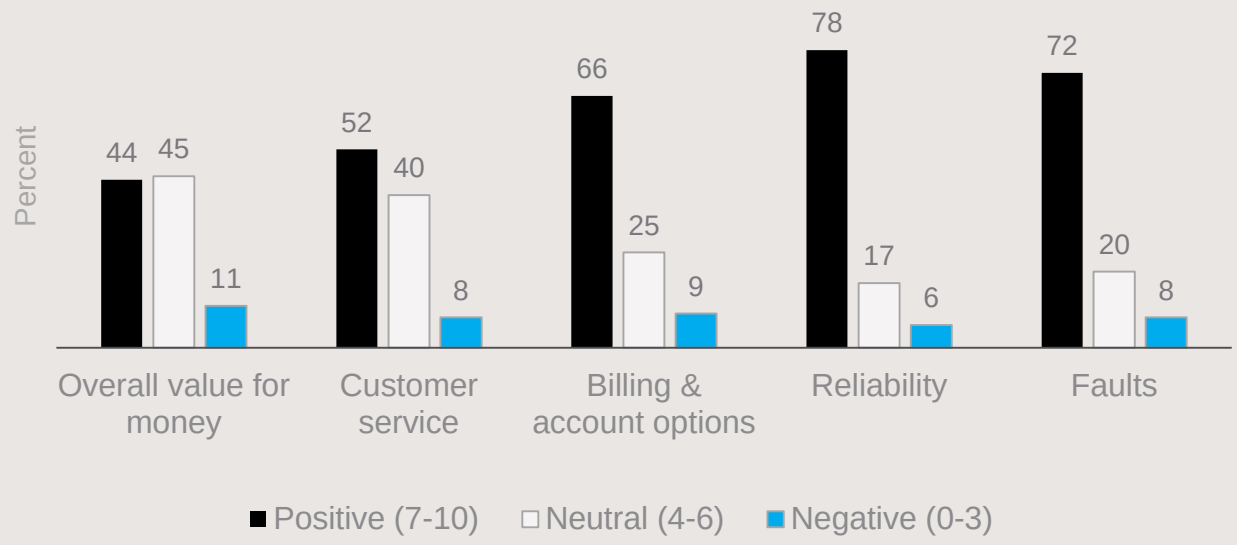
Essential. RESEARCH

Good performance on billing and faults

The high overall satisfaction seems to arise not from the perception that they are getting good value for money, but from higher satisfaction in areas like billing and the handling of faults.

- 44% are satisfied with the value for money they get, which is around the national average and behind both New South Wales (52%) and Victoria (48%).
- 66% are happy with the billing and account options and 72% are satisfied with the handling of faults. Both of these are the highest of all the states and territories.

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

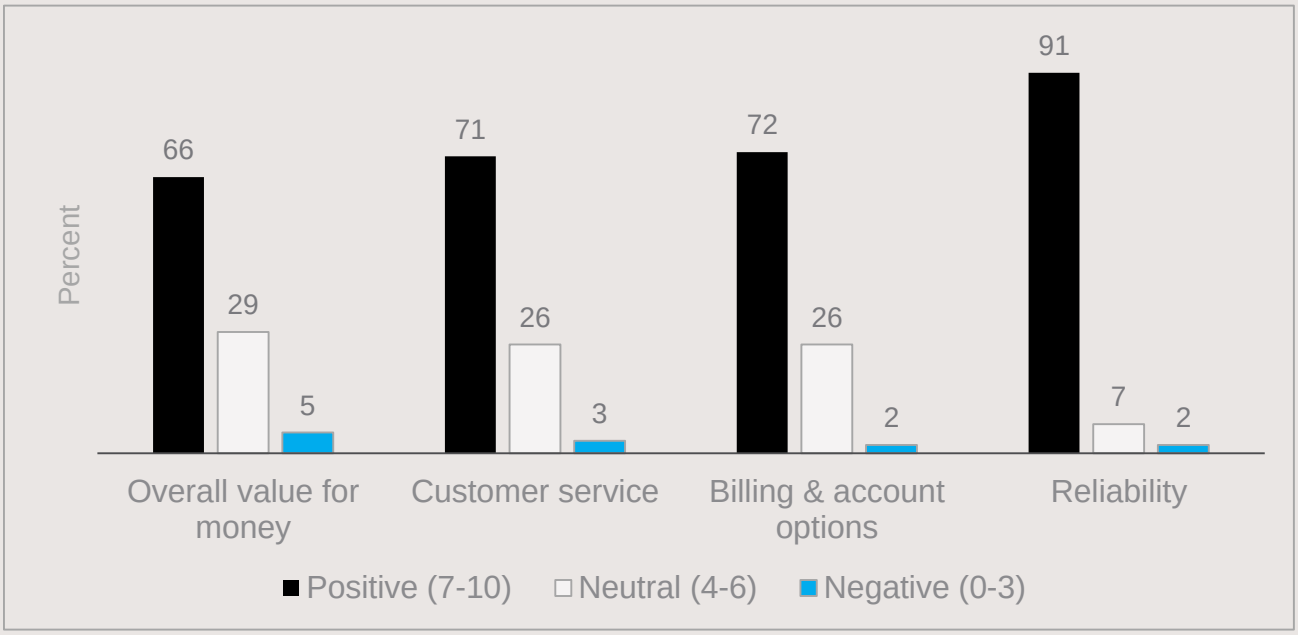


Very good results for gas

Western Australian household consumers are the most satisfied with their gas services.

- All these comparisons are with the next highest state
- 66% are satisfied with the value for money of gas, compared with 59% in South Australia
- 71% are satisfied with the customer service (versus 66% in South Australia)
- 72% are satisfied with billing and account options (versus 68% in South Australia)
- 91% are satisfied with reliability (versus 84% in Victoria)

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



Base: WA consumers with gas (n=164)

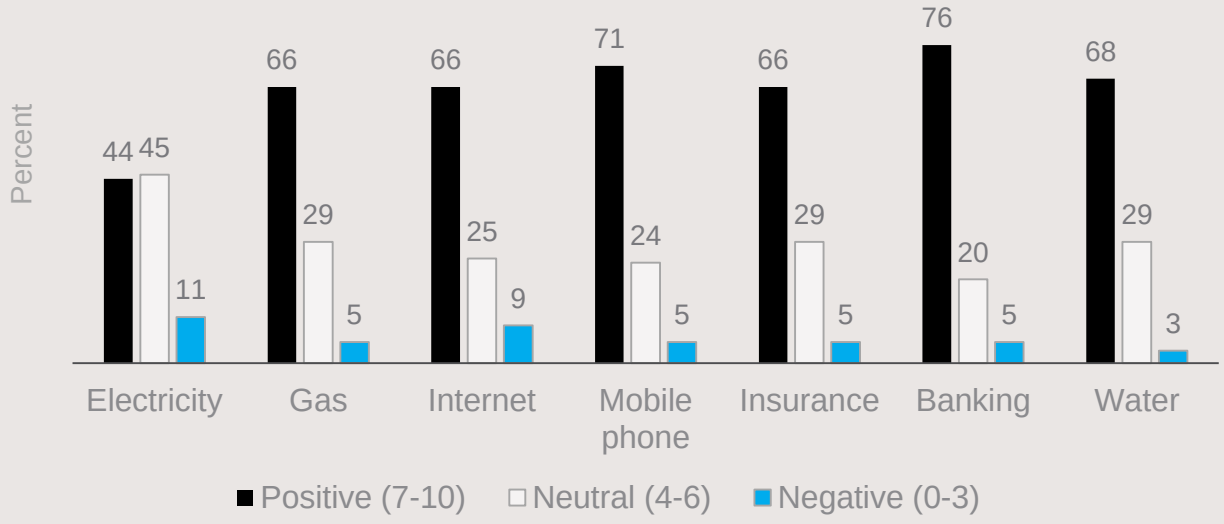
High satisfaction with value for money across the board

Apart from electricity, Western Australian consumers gave the highest value for money scores to most of the services tested in this survey.

- 66% are satisfied with the value for money of insurance services, for example, compared with 60% in the next highest states (Queensland and South Australia).
- The fact that they gave high value for money scores to a disparate range of services suggests that Western Australians may simply be in a relatively positive mood overall. This could mean that the fact that they are around the national average for value for money for electricity is actually something of a concern.

"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'



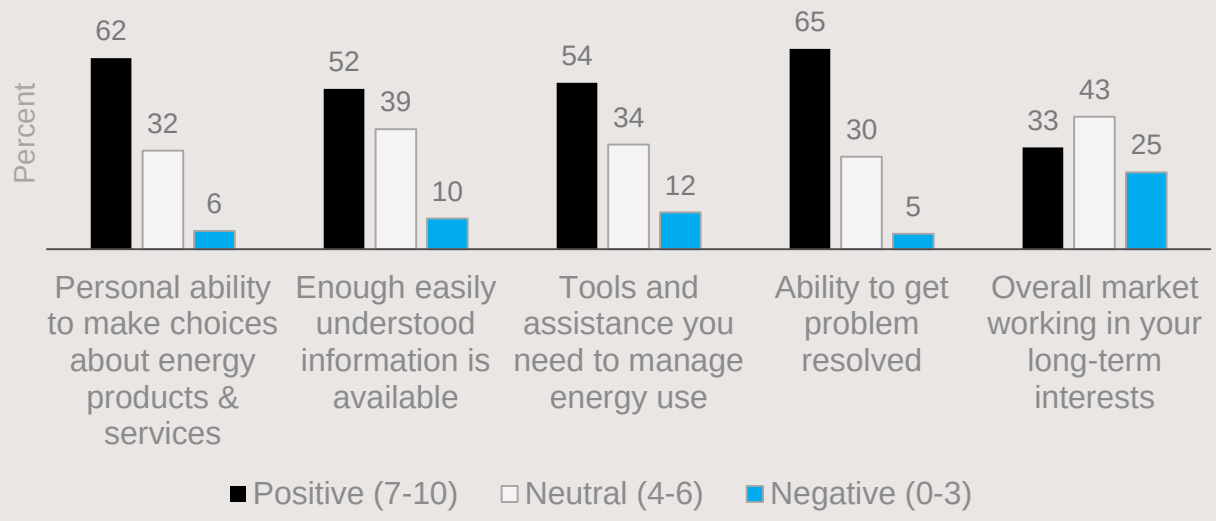
Confident in tools and problem resolution

Western Australian household consumers are more likely than consumers in other states and territories to say they are confident that they have the tools and assistance they need, and that they can get problems solved when they need to.

- 54% are confident that they have the tools and assistance they need to manage their energy use and costs, compared with 48% in New South Wales and just 37% in the ACT.
- 65% say that they are confident in their ability to get any problems resolved, compared with 60% in the next highest state (Victoria).
- Both of these seem related to the fact that Western Australians are also the most likely to say they are happy with their company's billing and account options and / or that they are satisfied with the way that past problems have been resolved.

How would you rate the [attribute]

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



Essential. RESEARCH

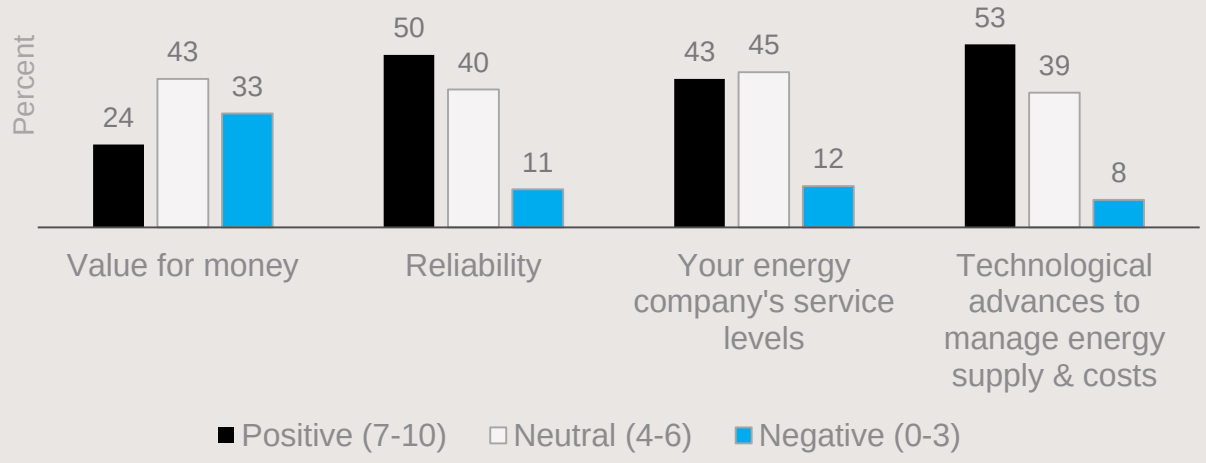
Greater confidence market will bring technological advances

53% of Western Australian household consumers are confident that the market will deliver technological advances to manage energy.

- Western Australia is behind only Victoria on confidence in this area.
- They are only mid range, however, in terms of confidence the market will deliver value for money and reliability.

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'



Highest current use of energy efficient light globes

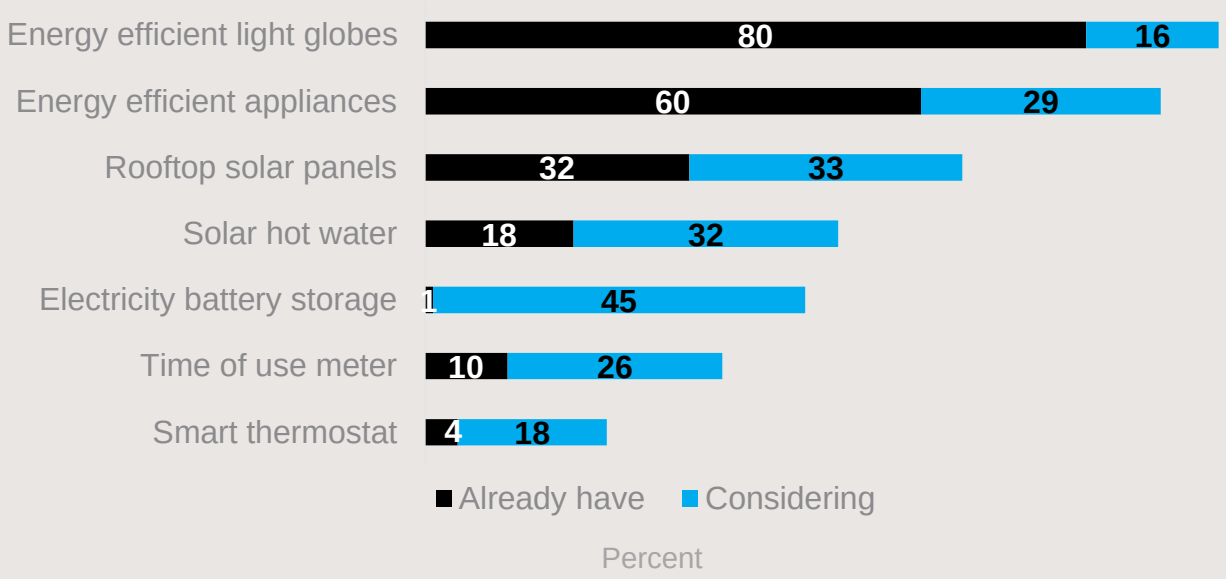
80% of Western Australian household consumers say that they currently use energy efficient light globes.

- Western Australia is therefore marginally ahead of Queensland (78%) and clearly ahead of both New South Wales (69%) and Victoria (64%) in use of such light globes.
- A further 16% say that they are considering using them, so the proportion that is not currently open to using energy efficient light globes is the smallest of all the states and territories.

As in Queensland, the use of rooftop solar panels is high and there is considerable potential to expand their use.

- 32% currently have rooftop solar, and 33% say they are considering it.

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



Most people have not considered switching

Almost two thirds of Western Australian household consumers have not considered switching in the last three years.

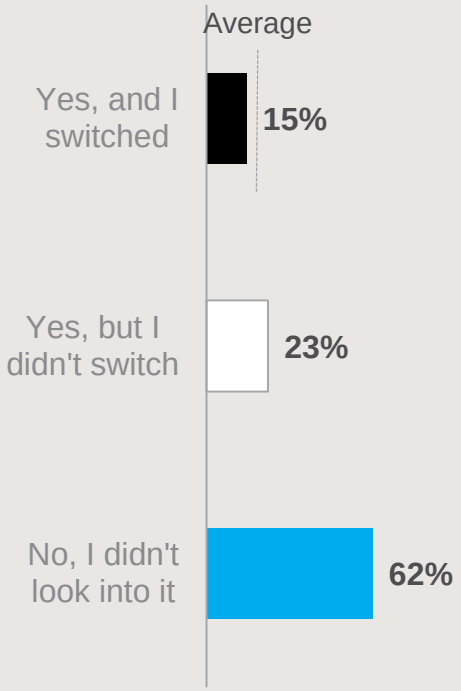
- 62% have not considered it, behind only Tasmania (90%) and the ACT (60%),

The proportion of those who have considered switching who actually ended up doing so is on a par with the most competitive states.

- 15% had switched, while 23% looked at switching.
- This means that 39% of those who considered switching actually did so (15% divided by the 38% who considered switching).
- This compares with 40% in New South Wales and 39% in Victoria, but only 29% in Queensland and 22% in ACT.

Previous behaviour

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



Value for money continues to be main reason for considering switching

The small sample (n=71) of Western Australian household consumers who considered switching again mainly cite value for money as the reason.

- 37% say that they switched because they were dissatisfied with the value for money they received
- 31% were not dissatisfied but found a better deal elsewhere.

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

Base: WA household consumers who considered switching in the last 3 years (n=71).

INDICATIVE ONLY: SMALL SAMPLE SIZE

Lack of alternatives

Western Australian household consumers are the second most likely to cite the lack of an alternative as a barrier to switching.

- 42% of those who had not considered switching said that this was because they were not aware of any alternatives.
- This is behind Tasmania (70%), but clearly ahead of all other states and territories. The most this barrier came through elsewhere was 16% in the ACT.

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

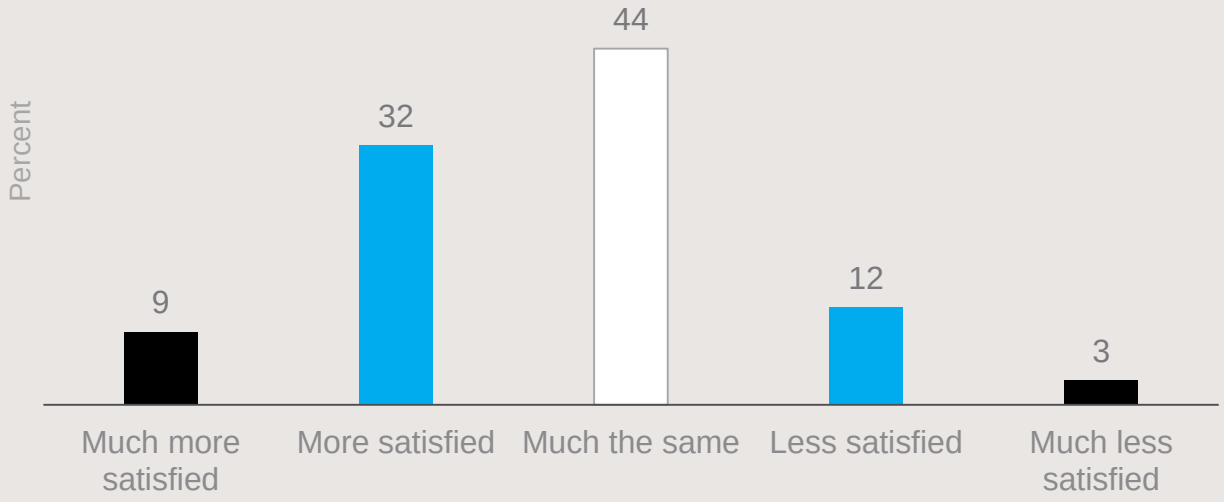
Base: WA household consumers who had not considered switching in the last 3 years (n=114)

Exploring the options makes many Western Australians more satisfied with current value for money

Although the number who considered switching is too small to allow anything other than indicative analysis, as in the states with more competition the act of considering a switch makes many Western Australian household consumers feel more satisfied.

- 41% of those who considered switching say that they now feel more satisfied, which is the same as Victoria (41%) and higher than Queensland (32%).

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



Base: WA household consumers who considered switching in the last 3 years (n=71)

INDICATIVE ONLY: SMALL SAMPLE SIZE

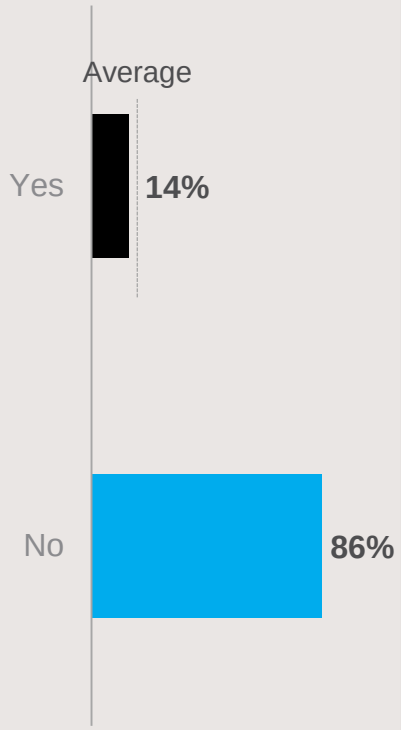
Not really considering switching in the future

14% of Western Australian household consumers are considering switching in the year ahead.

- This compares with 27% in Victoria and 22% in South Australia.

Future intentions

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

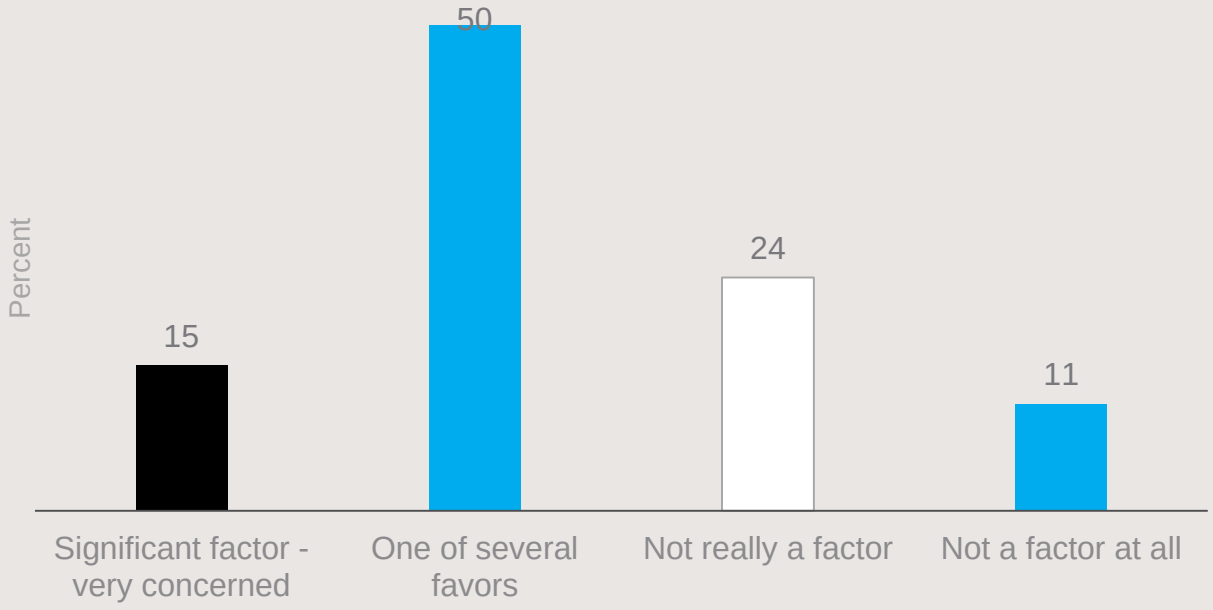


High consciousness of the environment

Western Australian household consumers are the most likely to say they consider the environment when making decisions about energy products and services.

- 65% say that it is a factor they consider, including 15% who say it is one of the most significant factors.
- The next highest states and territories are Tasmania (62%), ACT (60%) and Victoria (59%).

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

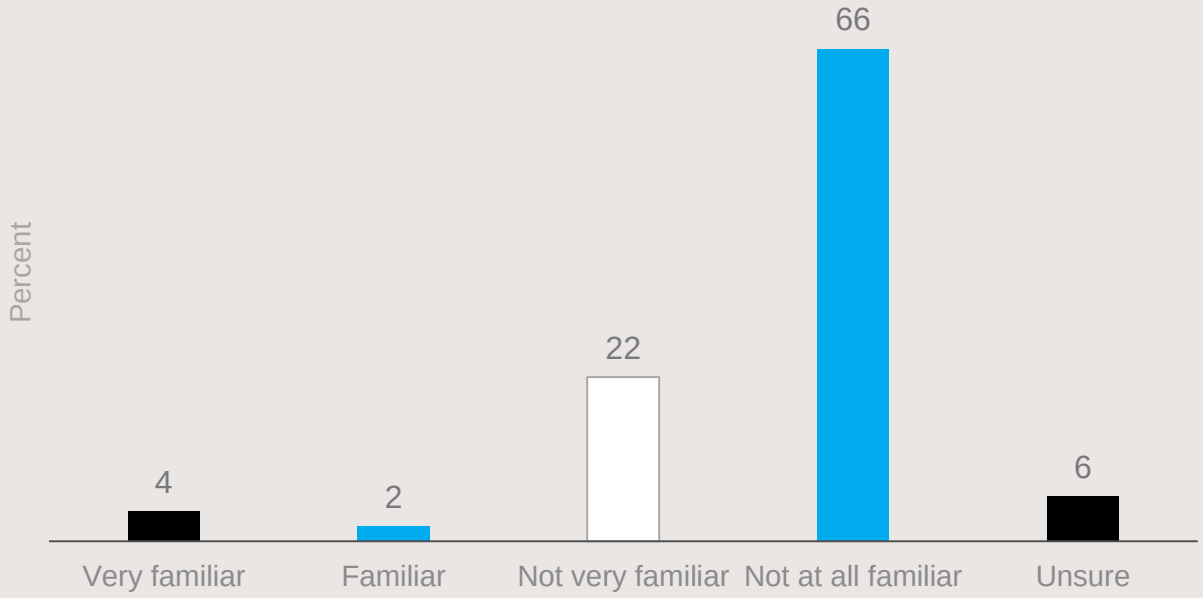


Very low knowledge of ECA

6% of Western Australian household consumers say they are familiar with ECA.

- This may relate to the fact that Western Australia is outside the National Energy Market.

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



Essential.
RESEARCH

CONFIDENTIAL

Energy Consumers Australia

Benchmark Survey: QUESTIONNAIRE

Appendix A: Survey

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

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

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

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

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

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

SECTION 2: ELECTRICITY PRICE

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

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

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

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

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

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

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

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

SECTION 3: GAS

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

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

15. Is your gas account with the same company as your electricity account? (SR)
    a. Yes, my gas and electricity accounts are with the same company [SKIP TO Q20]

b. No, I have a different company for my gas account
c. Don't know

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

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

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

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

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

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

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

SECTION 4: ADDITIONAL

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

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

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

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

29. Your water services

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

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

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

39. Have you ever switched energy companies or energy plans? (SR)
    a. No
    b. Yes – More than three years ago
    c. Yes – More than 1 year but less than 3 years ago
    d. Yes – In the past year
    e. Yes – I intend to do so in the next year

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

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

b. More satisfied
c. Much the same
d. Less satisfied
e. Much less satisfied

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

43. [ASK IF Q38 = c.] If you have not switched or looked into switching energy companies or energy plans in the last three years, which of the following best describes your reason not to?? (SR)
    a. Too time consuming to research
    b. Too difficult to organise (disconnection and reconnection)
    c. The information available is too complex and difficult to understand
    d. I'm happy with the deal I have now
    e. I was concerned I would end up with a worse deal
    f. (Business Customer Only) Decisions regarding which supplier to use are decided by company policy
    g. Other
    h. Don't know

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

SECTION 5: CONFIDENCE

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

[redacted]
    SCALE: 0 [redacted]

[redacted] (SR)
    SCALE: 0 [redacted] 0

[redacted]

energy company or a third party? Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
SCALE: 0 [redacted] 0

49. How confident are you that **the overall market is working in your long-term interests**? By 'the market' we mean, the energy industry and energy regulators. Please use a scale where 0 means not at all confident and 10 is very confident? (SR)
SCALE: 0 [redacted] 0

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

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

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

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

SECTION 6: FINAL DEMPGRAPHICS

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

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

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

59. [HOUSEHOLD ONLY] What is the composition of your current household? (SR)
    a. Person living alone
    b. Single person with children
    c. Couple only

d. Couple with children
e. Group / share household
f. Other (please specify)

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

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

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

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

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

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

b. Own
c. Other

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

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