Essential.
RESEARCH

Energy Consumers Australia

Energy Consumer Sentiment Survey June 2018

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Notes on methodology

This online survey was in the field from 19 March to 27 March 2018.
The survey fieldwork was conducted by Online Research Unit using participants from their online research only panel.

All other tasks were completed by Essential Research.

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

- The sample was stratified by state, territory and participant type, as outlined on the next page.
- Demographic data is available that allows different consumer groups to be identified.

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

All responses to questions are reported using a 0-10 scale.

- 10 is always the top end of the scale (‘excellent’, ‘very confident’ etc.) and 0 is always the bottom end (‘very poor, ‘not confident at all’ etc.).
- The charts usually group responses into ‘positive’ (those who gave 7, 8, 9 or 10), ‘neutral’ (4, 5 or 6) and ‘negative’ (0, 1, 2 or 3).

The comparison charts also often include a ‘national average’ for households.

- This represents the combined result for all household consumers, reported as a weighted average using the sample size for each jurisdiction as a proportion of the national total.
- National averages are intended to be indicative only. Because the sample is stratified by state and territory, some states and territories are over-represented (especially Tasmania and the ACT) relative to others (especially New South Wales and Victoria) on a population basis.

Data labels show the current result, and then the change since the April 2017 survey in brackets.

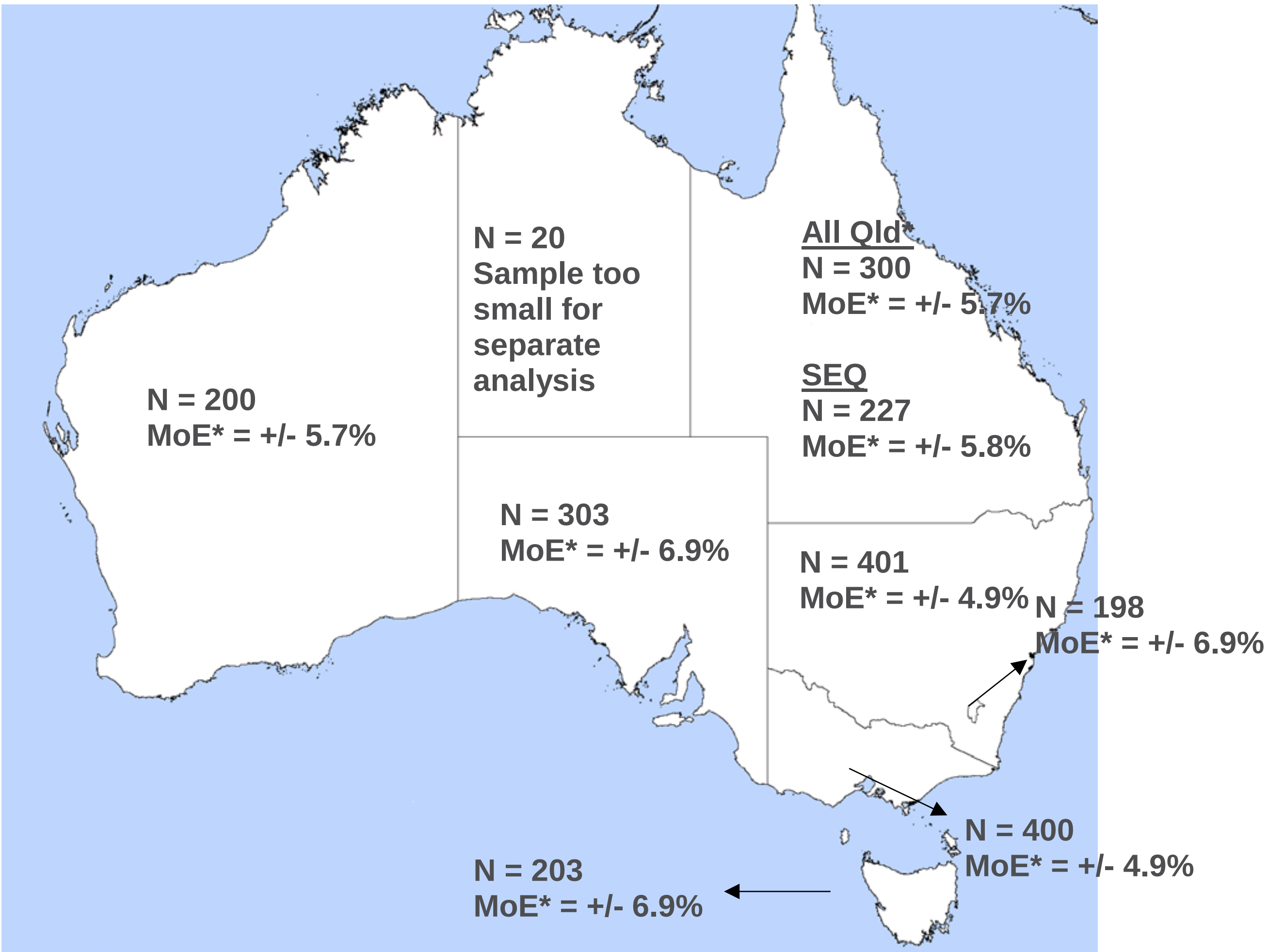
“62 (-5)” therefore means that the current result is 62%, down 5% since last year’s survey.

Some changes have been made to this survey from previous waves, including the addition of new questions, removal of other questions, and changing the order of some questions. These changes particularly affect the questions on switching behaviour.

The charts therefore do not show survey-to-survey movements for the switching questions, new questions, or those we asked in the last survey (Wave 4) but did not ask in the April 2017 survey.

We are reviewing the survey questions on switching and for that reason the results from these questions have been reported based on respondents switching behaviour in the past year and intentions to switch in the next year. We have not reported the 3-year data in this report.

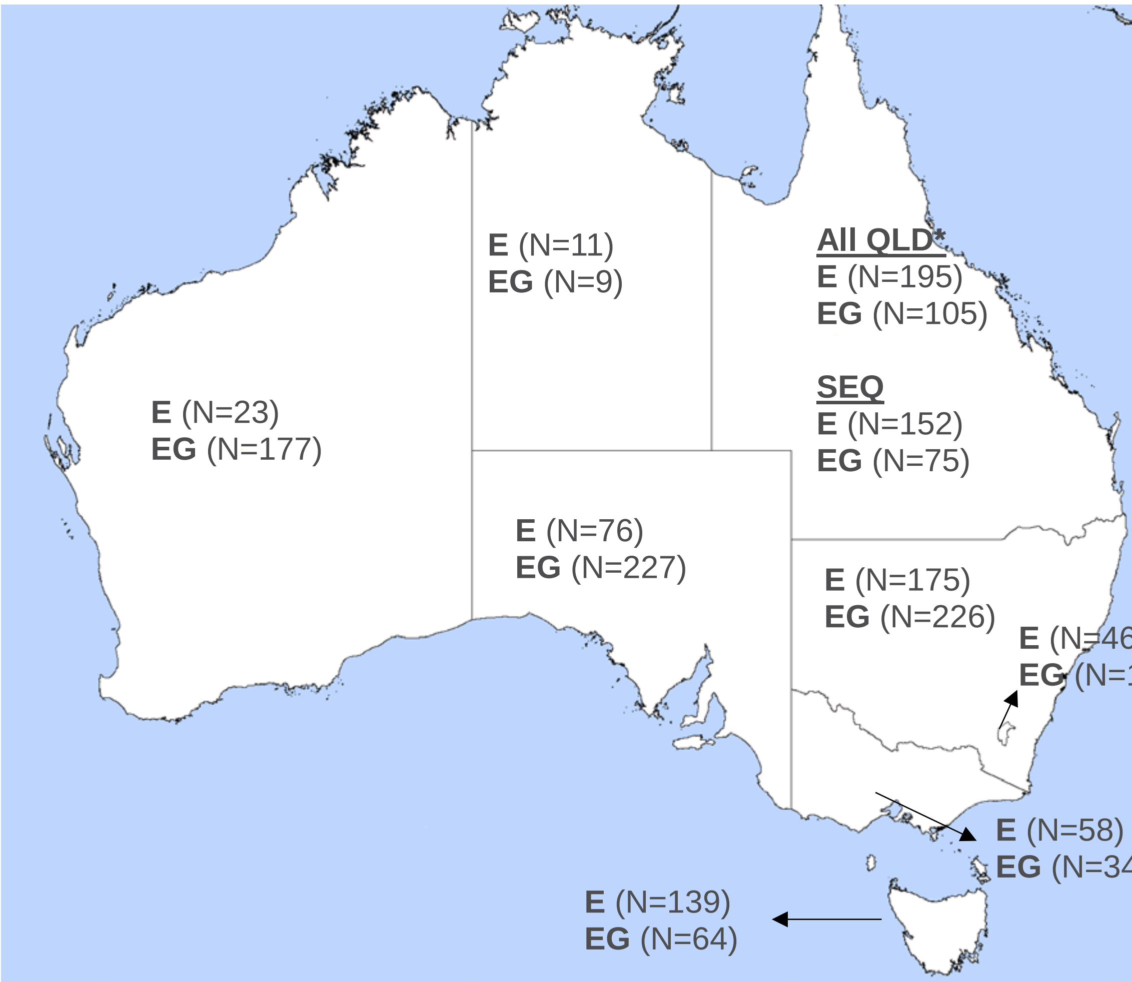
Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
N=281, MOE* = ±5.9%
(MOE = Margin of Error)
Including N=209 with 19 or fewer employees
and N=72 with 20 or more employees
* 'All Qld' includes SEQ

Samples by energy types



KEY
E Only electricity
EG Electricity and gas

Plus nationwide:

Businesses with less than 200 employees
E (N=128)
EG (N=153)
***** 'All Qld' includes SEQ

Summary Findings

Summary of key findings

This is the fifth wave of a biannual survey. The report shows both the results for this survey and the changes in the results between this wave and the third wave, conducted in April 2017.

- In the third survey we noted a potential seasonal effect in the data. Continued evidence of this effect has led to us comparing surveys year on year, rather than comparing consecutive six-monthly surveys. In this case, we compare results in this survey (Wave 5) with results from Wave 3 (taken in this time last year).

Comparing Wave 3 and Wave 5 shows a mixture of declines and increases across key measures amongst household consumers, and consistently larger decreases in satisfaction among small business consumers.

- The biggest change in overall satisfaction with electricity services was among small businesses – down 12%.
- Overall satisfaction with the provision of electricity and gas services among households has increased by as much as 4% in Queensland and South Australia, and decreased by as much as 5% in Victoria, though satisfaction in household markets continues to remain clustered between 60-70%.
- Consumers are generally less satisfied with the value for money they receive for electricity than they were a year ago, with the exception of Queensland which saw modest improvements and Tasmania which was starting from a low base. We saw the biggest drops in consumers satisfaction with value for money among small businesses, as well as household consumers in the ACT. The most satisfied consumers were in Queensland, NSW and Victoria, although no state saw satisfaction levels above 50% on this measure.
- Satisfaction with the reliability of electricity is down across all markets except for South Australia, where it has increased by 15%. This increase is likely due to the length of time passed since the South Australian blackouts in September 2016, after which satisfaction dropped significantly. In other markets, satisfaction on this measure has decreased by as much as 14% in Victoria, and 9% among small business consumers.
- Satisfaction with the level of competition in the energy market is also down across most markets, although it has increased by 7% to 40% in Western Australia and by

2% in South East Queensland to 53%. Satisfaction with competition is lowest in Tasmania (9%) and the ACT (20%).

Consumer confidence has dropped significantly across most measures and most markets

- While the results vary by jurisdiction, this survey generally saw large drops in consumer confidence in their own ability to make choices about energy (down by between 4%-21%); confidence there is sufficient easily understood information to support those choices (down by between 1-13%); and how confident they are that the overall market is working in their interests (down by 0-14%).
- Confidence that market outcomes will improve in the future have also fallen. Only between 1 and 3 consumers in every 10 expect to see better value for money outcomes from the energy market in 5-years' time.

Most consumers have acted to lower their energy use

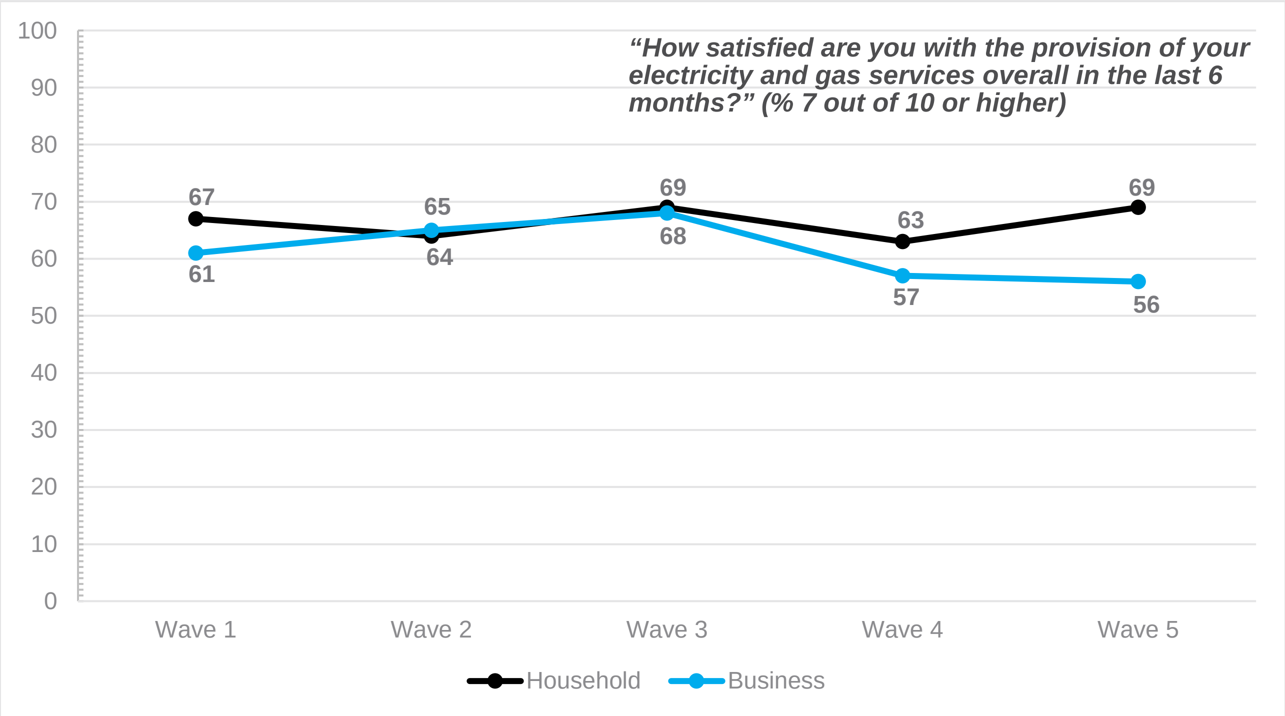
- Most consumers are active in managing their energy costs, predominantly through simple tactics like switching off lighting and appliances when they're not in use and using appliances less frequently or more efficiently.
- Between one-third and half of all consumers (depending on the jurisdiction) also report switching appliances use to off-peak times.
- In each market, at least 24% of consumers say they have rooftop solar panels, and at least 20% say they are considering getting them.
- While ownership of battery storage systems is currently low (between 2% and 5% in each market), 40% of SA household consumers and at least 22% in other states and territories say they are considering battery storage.
- Across each state and territory, at least 63% and as many as 75% of consumers say that they would be prepared to reduce their energy usage in times of very hot weather.

Trends

Overall Satisfaction

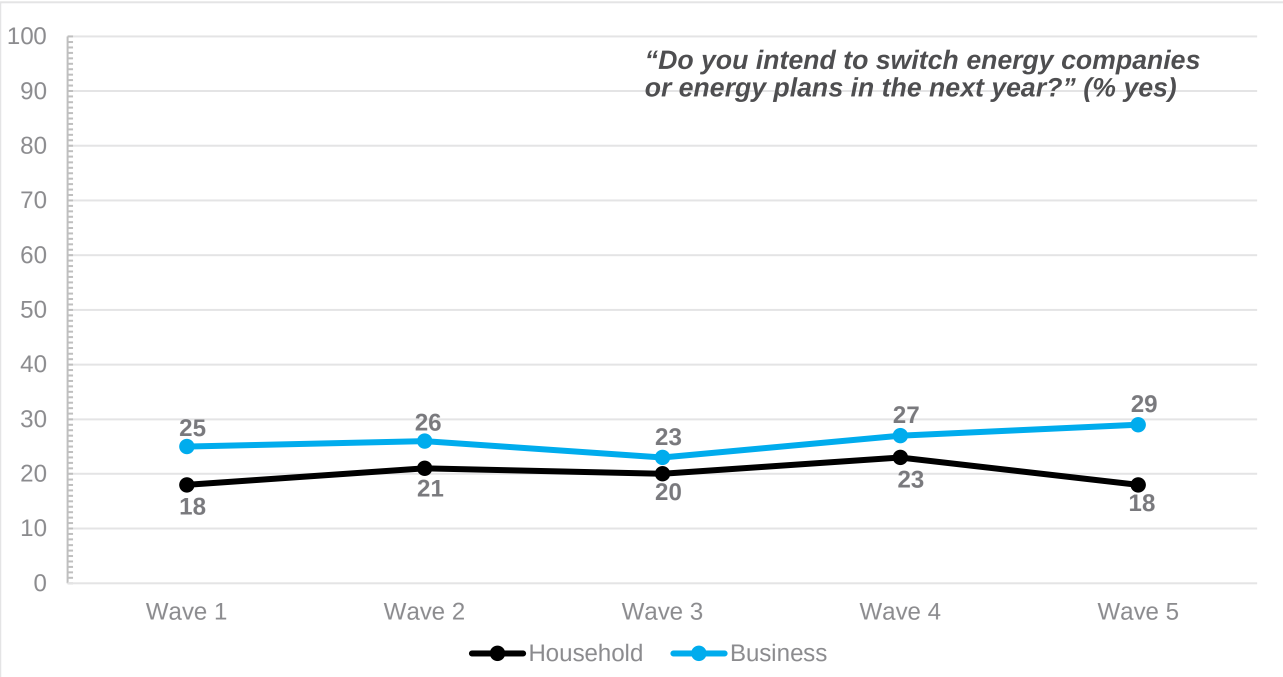
The following charts are based on the overall numbers from all states and territories. Because the Energy Consumer Sentiment Survey is mainly designed to show results for household consumers by state and territory, with quotas for each state and territory that do not necessarily reflect their share of the overall Australian population, the state and territory numbers need to be weighted heavily to give a number for Australia as a whole. The effective sample size for household consumers (i.e. what the sample is equivalent to once weighting is taken into account) is n=1963.

For household consumers, the pattern continues to be that satisfaction rises in the summer surveys (Waves 1, 3 & 5) and falls in those surveys conducted towards the end of winter (Waves 2 & 4). This pattern does not seem to apply to small business consumers, where overall satisfaction rose for Waves 2 and 3 but has fallen since.



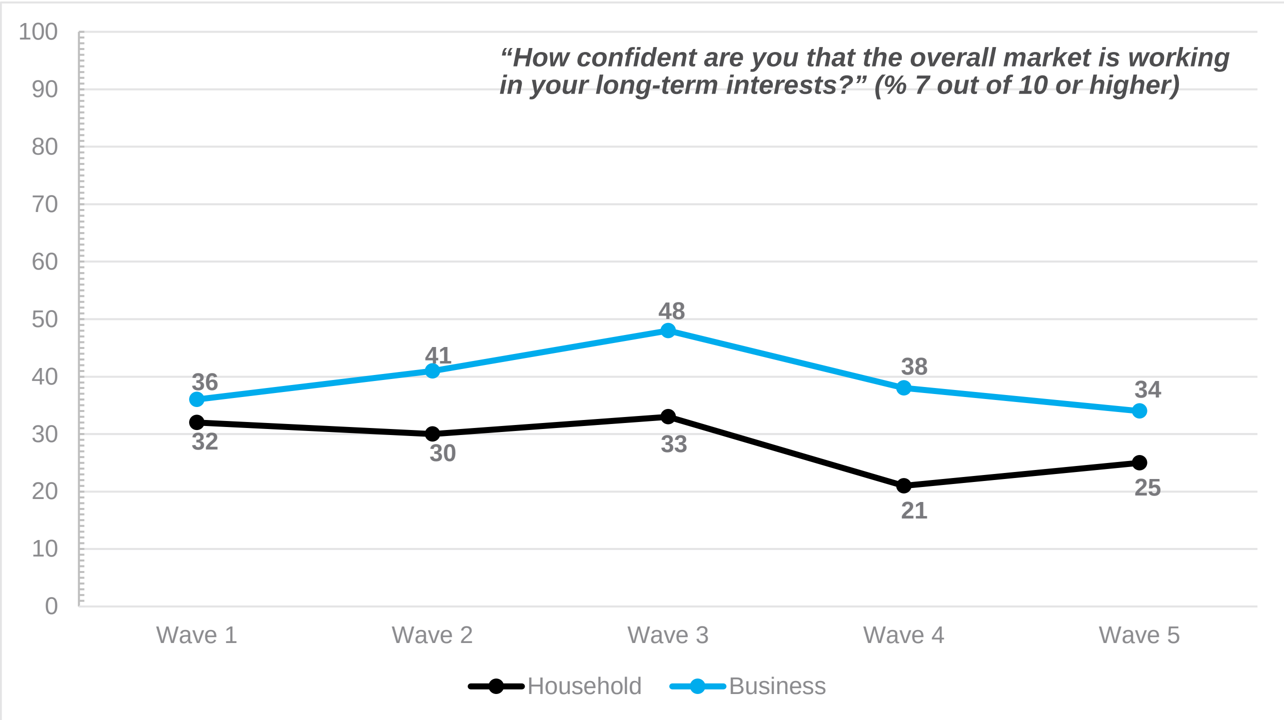
Switching

Businesses have reported a greater intention to switch than household consumers across each wave. For household consumers, although the differences are not statistically significant at the 95% confidence level, there is some indication that the numbers intending to switch may fall when overall satisfaction increases. This is consistent with the hypothesis that one of the key drivers of switching is dissatisfaction with the current provider.



Long-term interests

Confidence that the energy market is working in the long-term interests of consumers appears to be trending downwards for both household and small business consumers, although there was a small positive increase for household consumers between waves 4 and 5.



National findings

Satisfaction

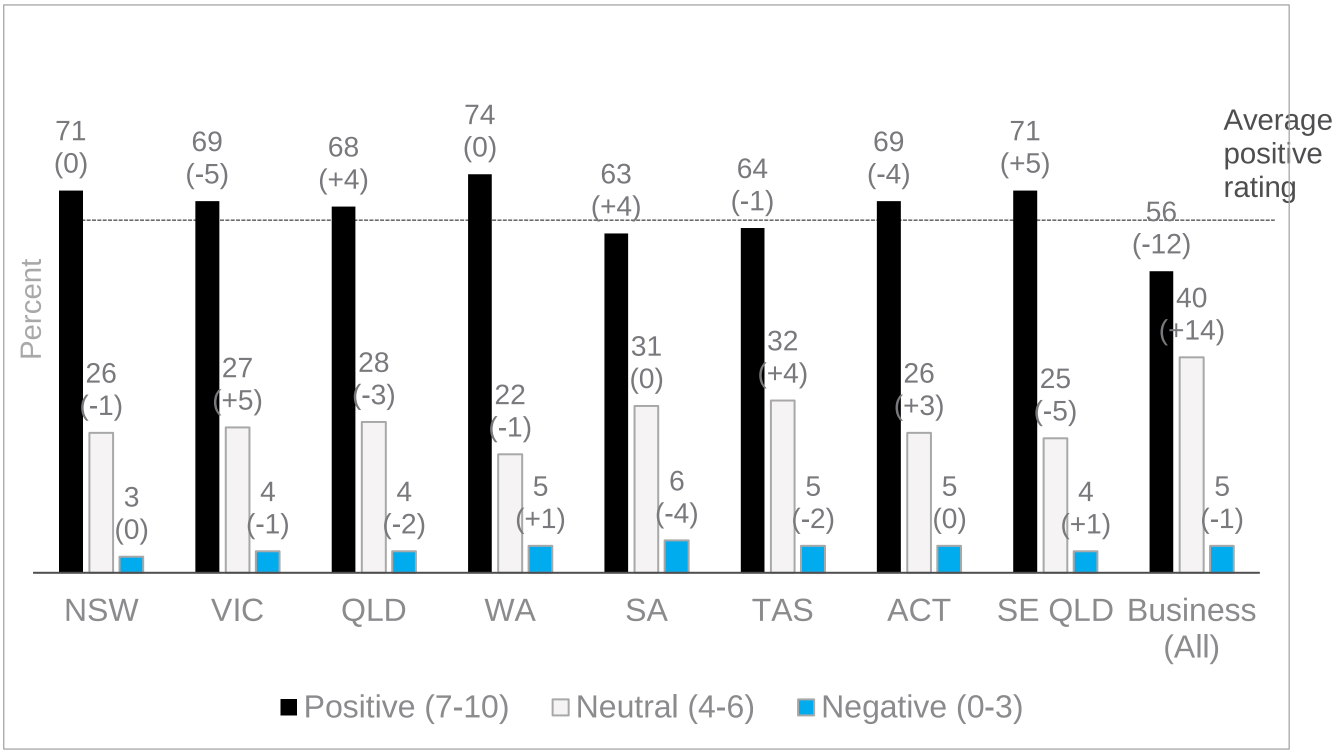
Overall satisfaction

Overall satisfaction with the provision of electricity and gas services is down at least slightly in three of the seven states and territories for household consumers, up in SA, Queensland (including South East Queensland), and down 12% to 56% amongst small business consumers.

- The largest falls in household consumers' overall satisfaction were in Victoria (down 5% to 69% satisfied) and the ACT (down 4% to 69%).
- The largest increase in satisfaction was in South East Queensland (up 5% to 71%).

"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'



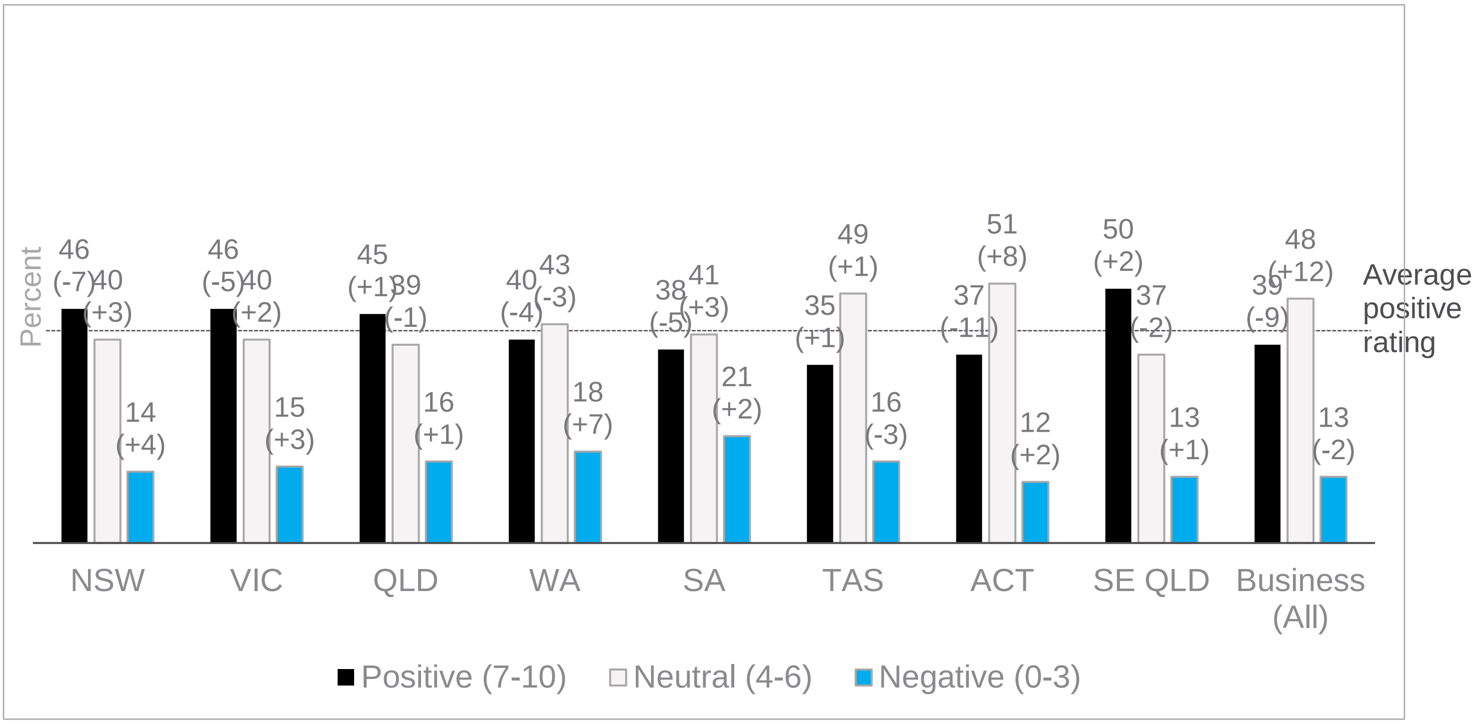
Satisfaction

Overall value for money (Electricity)

Ratings of the value for money of electricity have decreased in most states and territories and among small business consumers.

- The largest shift was in the ACT, where satisfaction in value for money decreased 11% to 37%.
- Tasmania remains the state with the lowest level of satisfaction, with 35% of Tasmanian consumers satisfied with the value for money of electricity (up 1%).

"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'



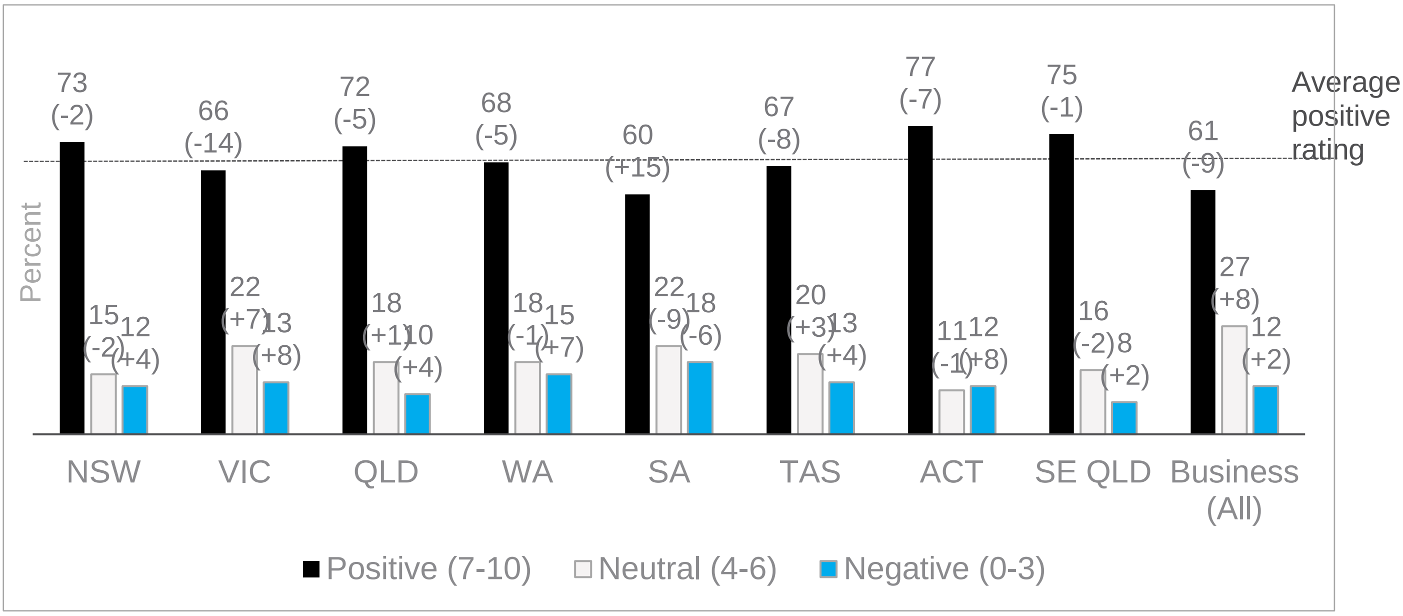
Reliability (Electricity)

Satisfaction with the reliability of electricity is down across all states and territories except for South Australia, and down among small business consumers.

- The only increase was in SA, where satisfaction rose 15% to 60%. This is likely due to length of time which has passed since the South Australian blackouts in September 2016.
- The largest decrease was in Victoria, where satisfaction fell by 14% to 66%.

"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'



Satisfaction

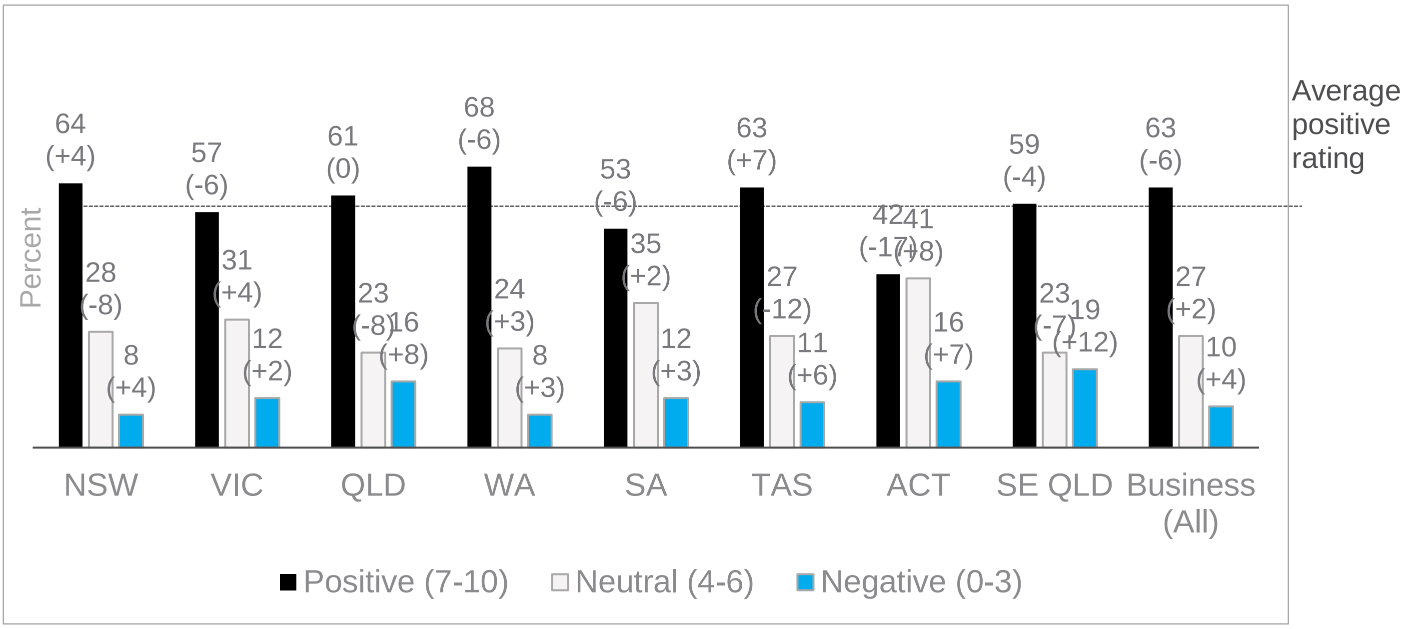
Overall value for money (Gas)

Satisfaction with value for money is down in most markets.

- The largest change is in the ACT where 42% of household consumers rate the value for money of gas positively, down 17% from April 2017.
- The largest increase was in Tasmania, where satisfaction was up 7% to 63%.

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

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



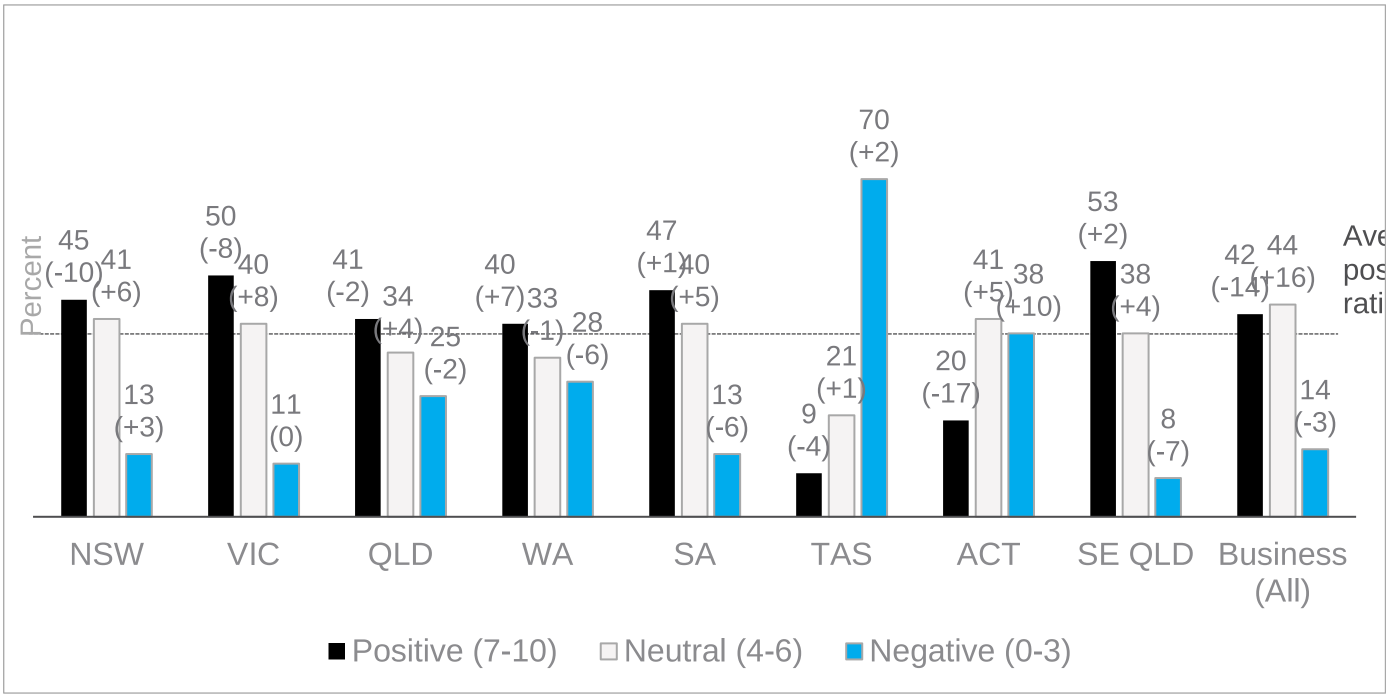
Note: Small sample size for Tasmania (n=64) and SE Queensland (n=75).

Level of competition

Satisfaction with levels of competition in the energy market is up in WA, SA and South East Queensland, but down in other markets.

- The largest increase in satisfaction was in WA (up 7% to 40%).
- The largest decreases were in the ACT (down 17% to 20%), NSW (down 10% to 45%) and among small business consumers (down 14% to 42%).

"How satisfied are you with the level of competition in the energy market in your area?" 0-10 scale, 0='not at all satisfied', 10='very satisfied'

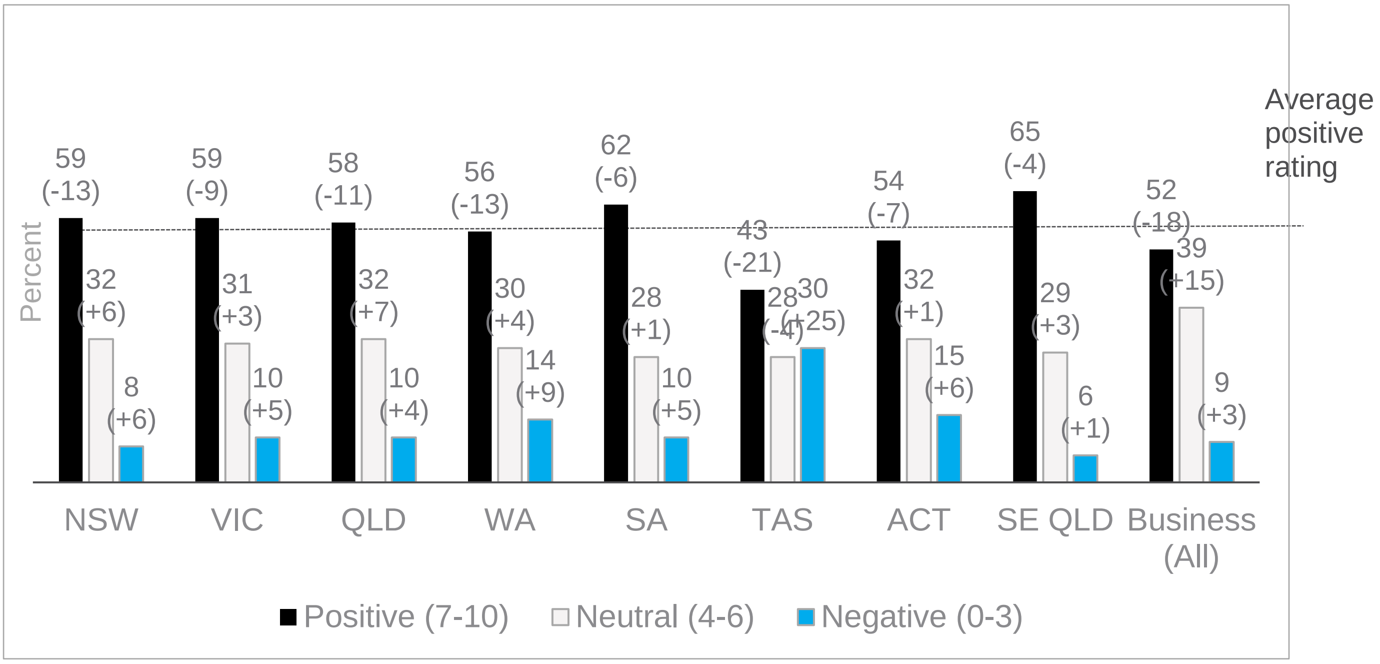


Consumer confidence in their abilities

Consumers' confidence in their own ability to make choices about the energy market is down across all markets.

- The largest shifts among household consumers were in Tasmania (down 21% to 43%), NSW (down 13% to 59%) and WA (down 13% to 56%).
- 52% of small business consumers express confidence in their own ability to make choices, down 18%.

"How confident do you feel in your ability to make choices about energy products and services?"
0-10 scale, 0='not at all confident', 10='very confident'



Confidence

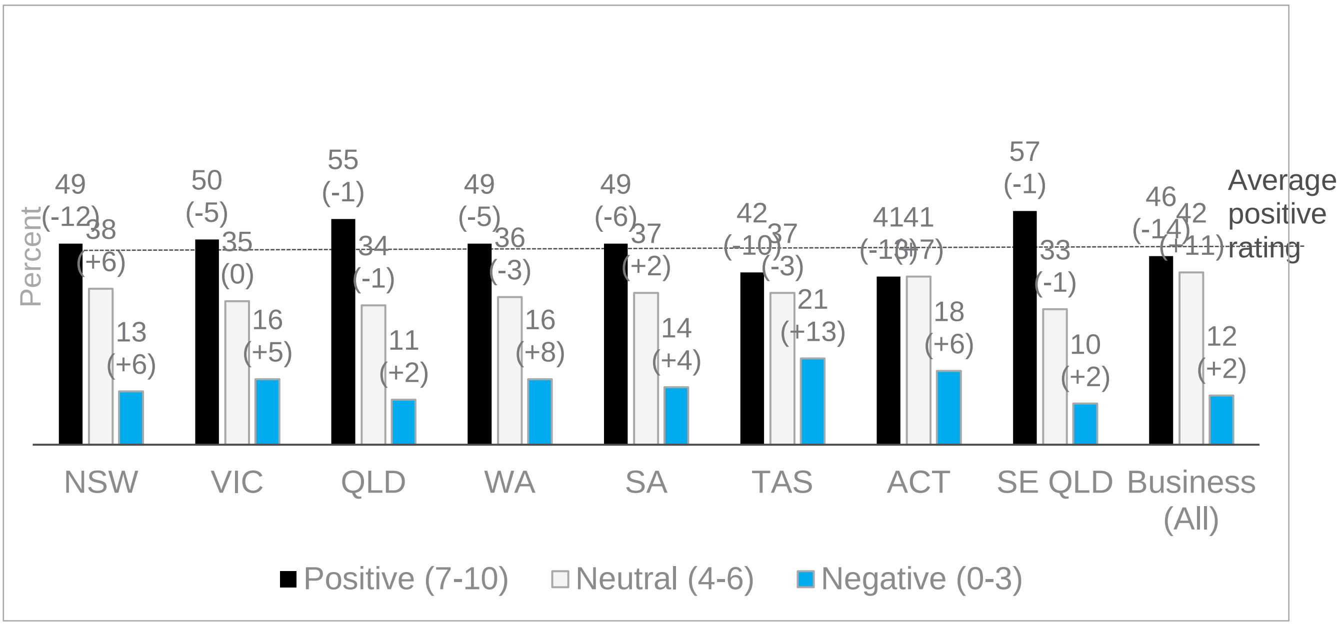
Confidence in the availability of information

The proportion of consumers expressing confidence that there is enough easily understood information available for them to make decisions about energy products and services has decreased across all markets.

- 46% of small business consumers rate this positively, down 14% from April 2017.
- The largest shifts in household markets were in NSW (down 12% to 49%), the ACT (down 10% to 41%), and Tasmania (down 10% to 42%).

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

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



Confidence

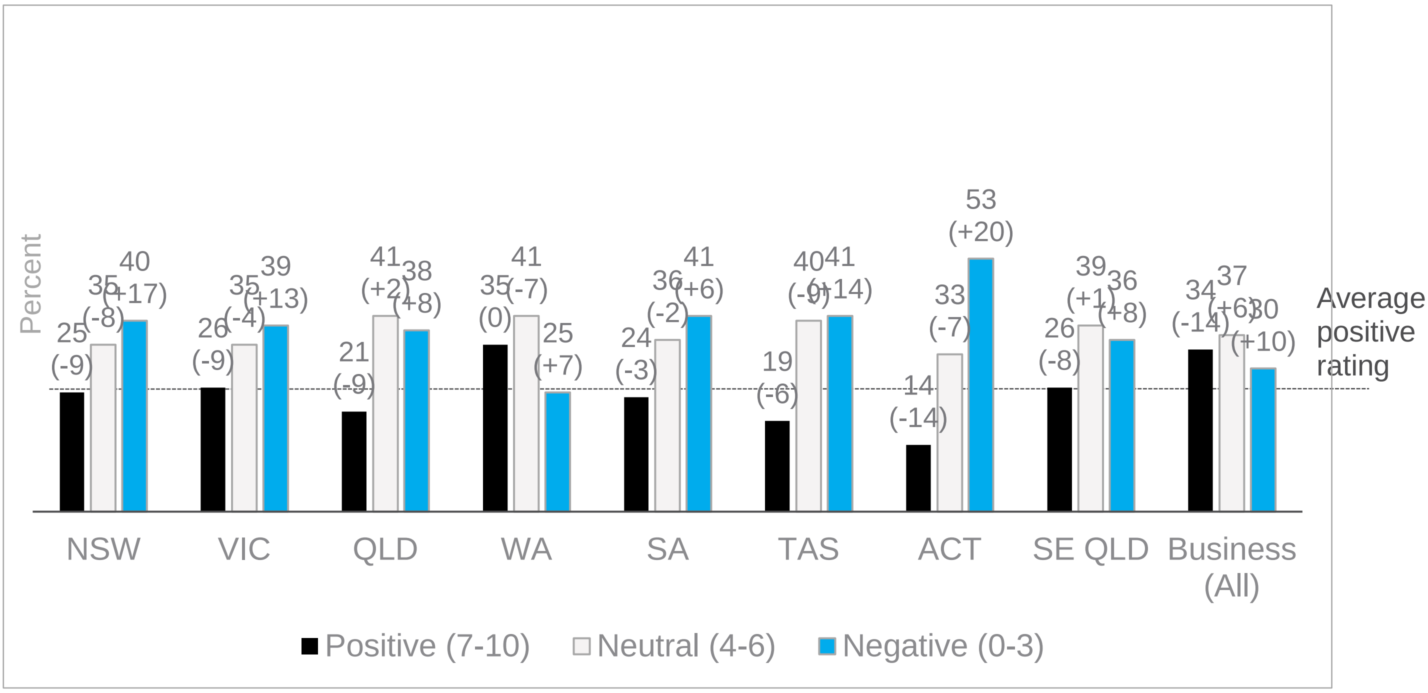
Confidence in the market

Confidence that the energy market is working in the interests of consumers is down across all markets except Western Australia, where it has remained unchanged.

- The most significant changes are the ratings from consumers in the ACT (down 14% to 14%) and among small business consumers (down 14% to 34%).

"How confident do you feel that the overall market is working in your long-term interests? By 'market' we mean the energy industry and energy regulators"

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



Confidence

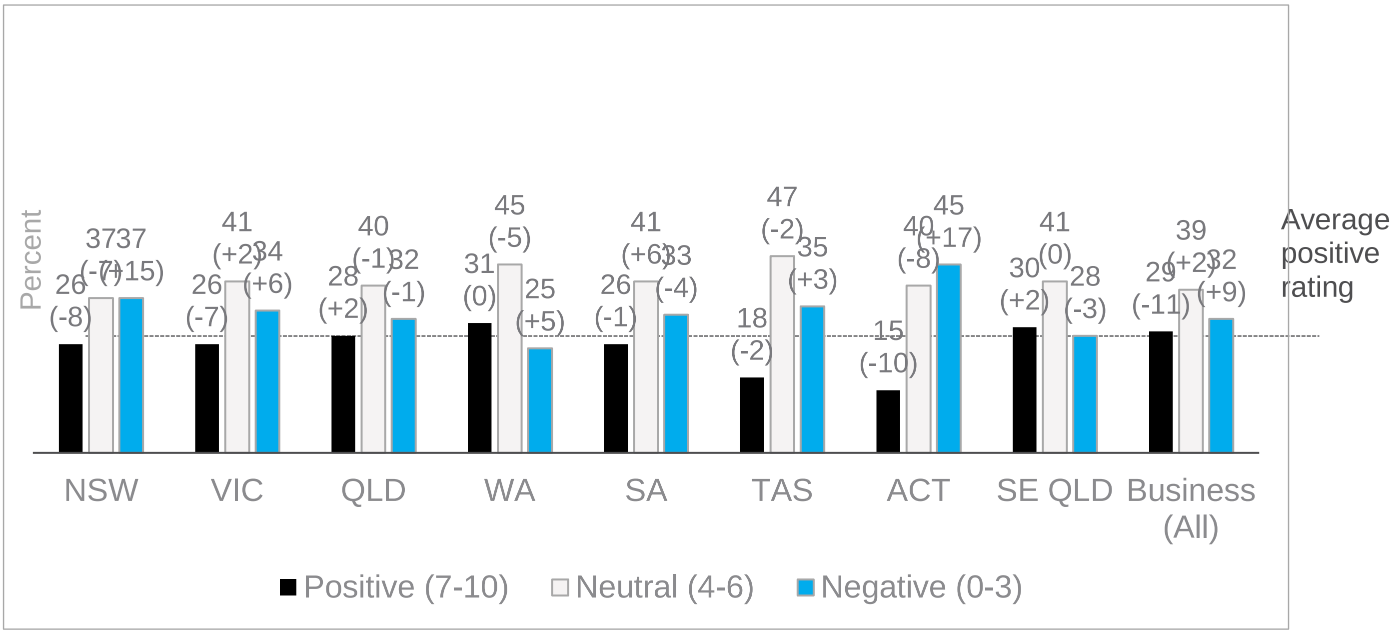
Confidence in the future value for money

Confidence in future value for money declined in most markets.

- Confidence was up slightly in Queensland (up 2% to 28%), with a 2% increase in South East Queensland (now 30%).
- The largest decreases in confidence were in the ACT (down 10% to 15%) and among small business consumers (down 11% to 29%).

"How confident do you feel that the energy market will provide better outcomes for you in 5 years, in terms of value for money? By 'market' we mean the energy industry and energy regulators"

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



Confidence

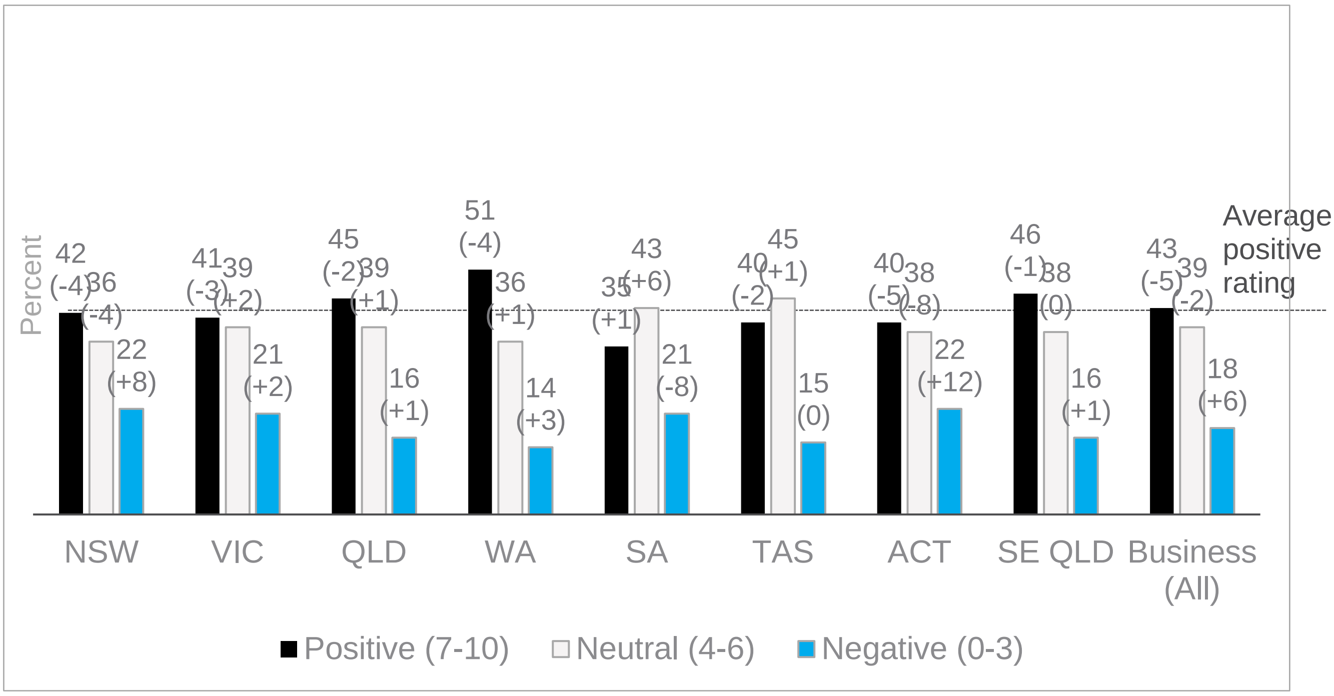
Confidence in future reliability

The proportion of consumers expressing confidence that the market will deliver increased reliability was down for all markets except South Australia where confidence was up 1% to 40%.

- The largest drops in confidence are in the ACT (down 5% to 40%), NSW (down 4% to 42%), Victoria (down 3% to 41%) and WA (down 4% to 51%).
- Confidence was also down 5% among small business consumers (to 43%)

"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'



Confidence

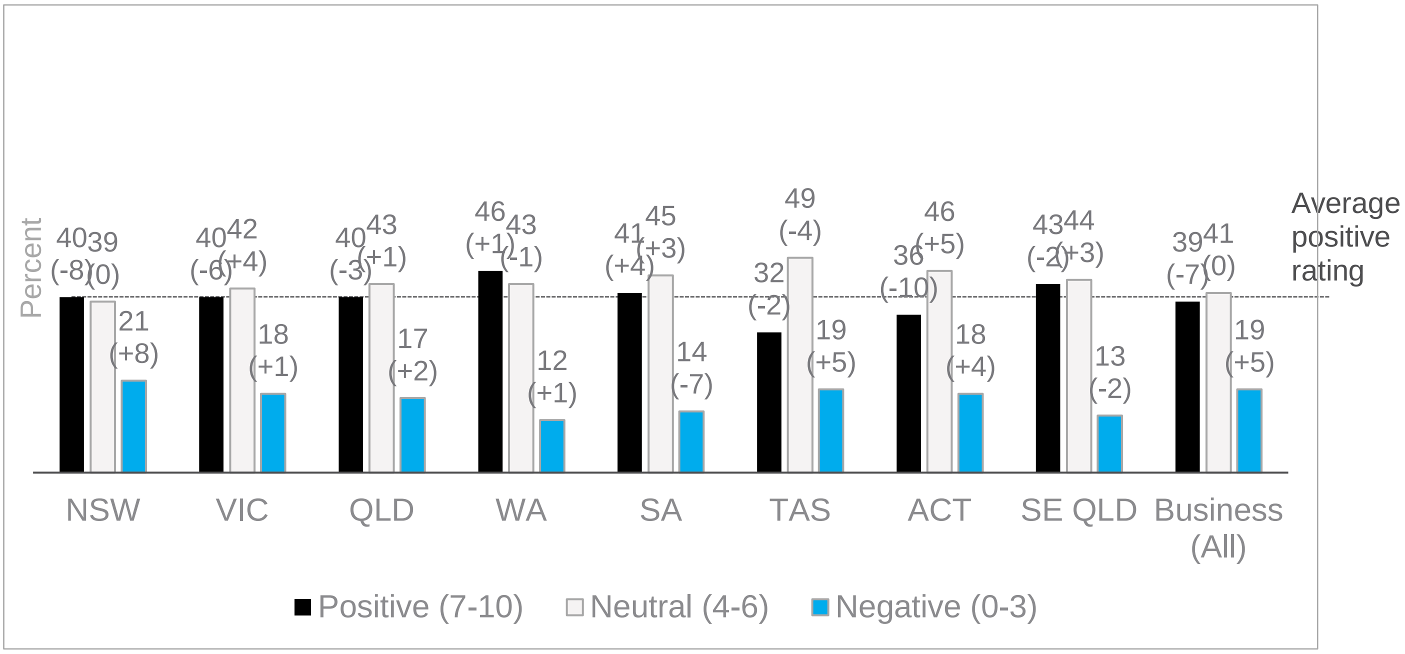
Confidence in future technology

The proportion of consumers expressing confidence that the market will deliver technological advances to manage energy costs was up in Western Australia and South Australia, and down in all other markets.

- The largest decreases in confidence are in the ACT (down 10% to 36%) and NSW (down 8% to 40%).

Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of technological advances to manage your energy supply and costs?

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



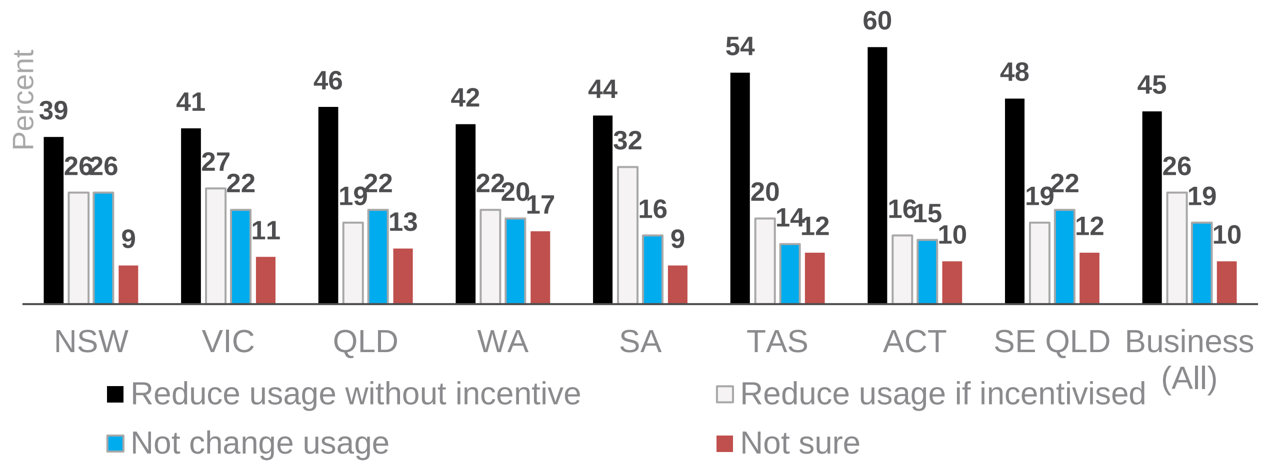
Activity

Energy use reduction campaigns

Most consumers are prepared to reduce energy use during very hot periods – but many would require an incentive to do so.

- Across all markets, a strong majority say that they would willing to reduce their energy usage – but many of these would only do so if incentivised.
- A majority of those in the ACT (60%) and Tasmania (54%) would reduce their usage without an incentive.
- The requirement for an incentive is highest among South Australian consumers, of whom 32% say they would only reduce their usage if they received an incentive.

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



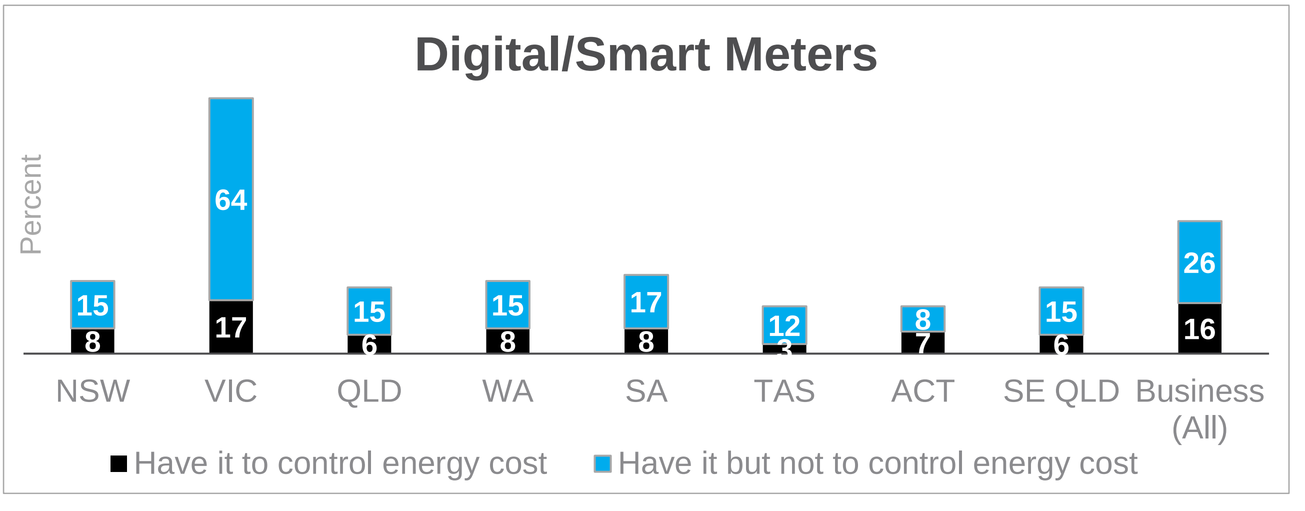
Activity

Technology to control energy costs

With the exception of Victoria, where almost 3 million smart meters were rolled out through a State Government program, there is a relatively modest uptake of smart technology and energy management systems across energy markets.

- Use of smart meters is highest in Victoria, where 81% say they have one, though only 17% say that they use it to control energy costs.
- The ACT has the highest uptake of smart thermostats (18%) with the majority of these (15%) saying they have them to control costs.
- 12% of small business users have an energy management system (6% have one to control costs) while among household consumers, Victoria (10%), Queensland (8%) and South East Queensland (9%) have the highest uptake of this technology.

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



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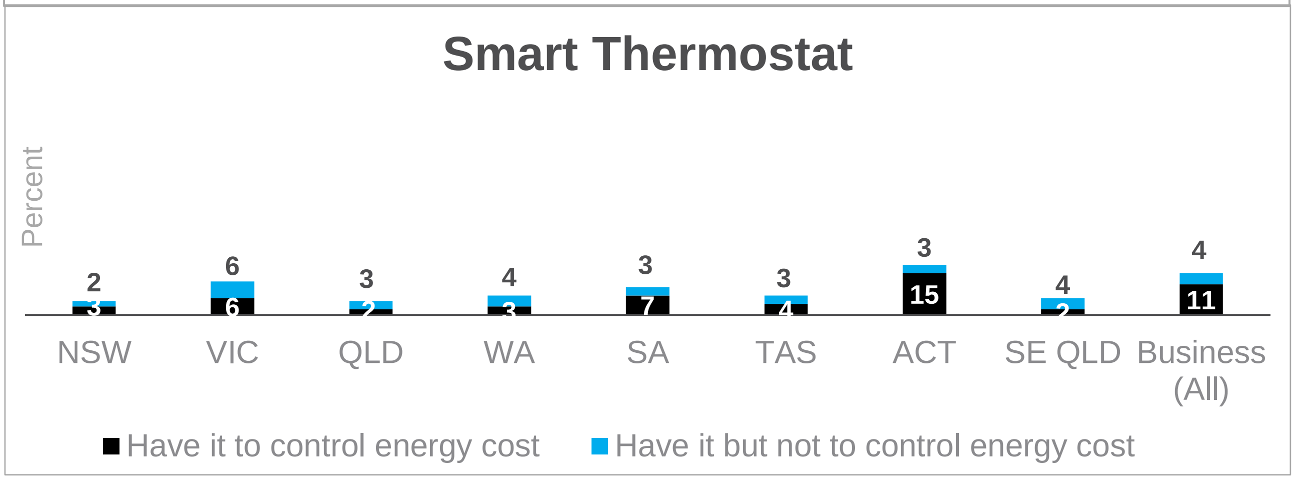
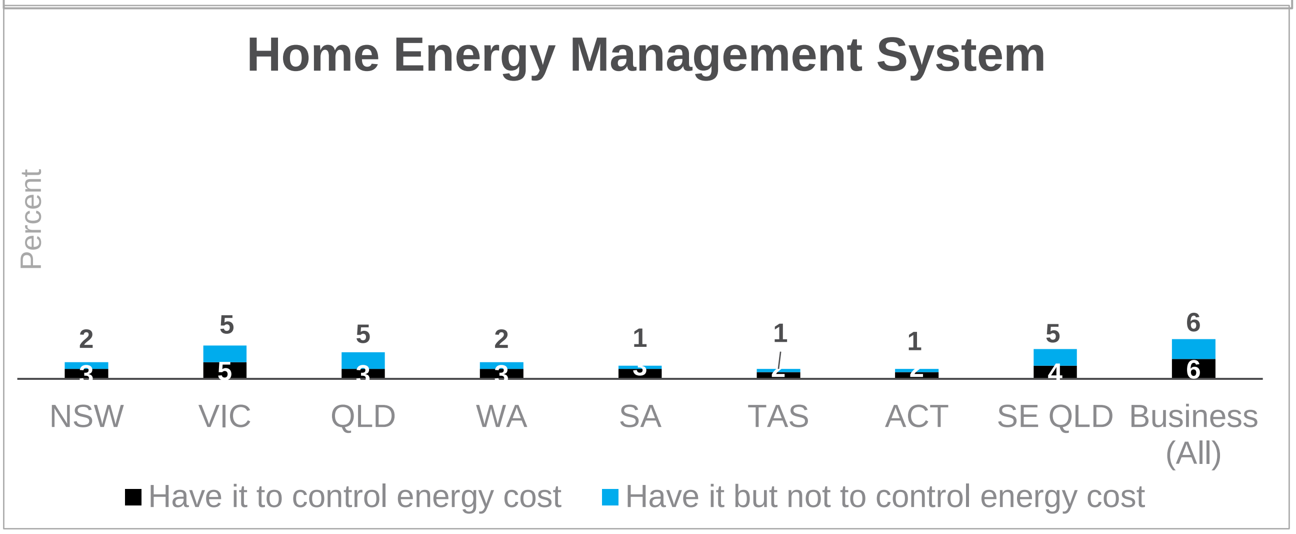
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs?



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



Uptake of energy efficient technologies

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

In most markets, there was significant interest from consumers who had not already taken up rooftop solar, battery storage or home energy management systems, in these technologies.

- Between 22% and 40% of consumers in each market are considering purchasing a battery storage system.
- Between 20% and 37% are considering rooftop solar panels.
- Between 14% and 23% are considering a home energy management system.

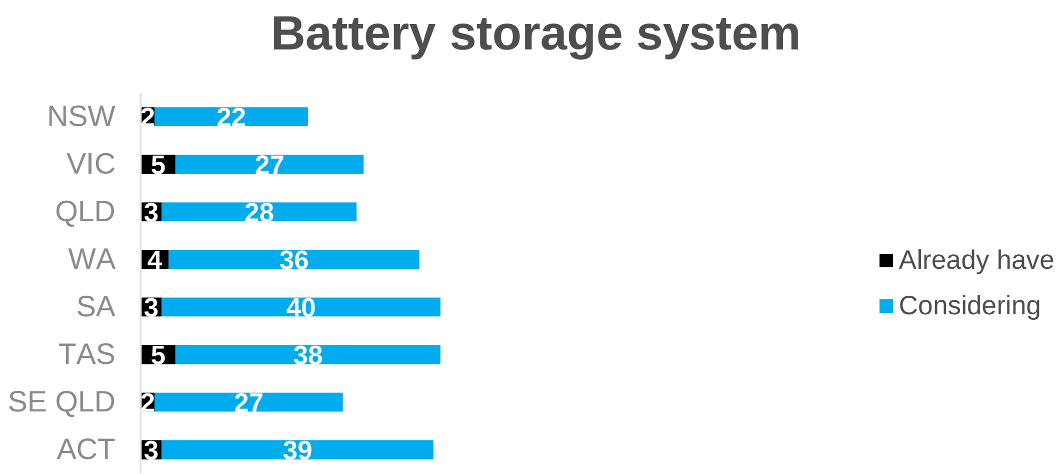
See following pages for charts

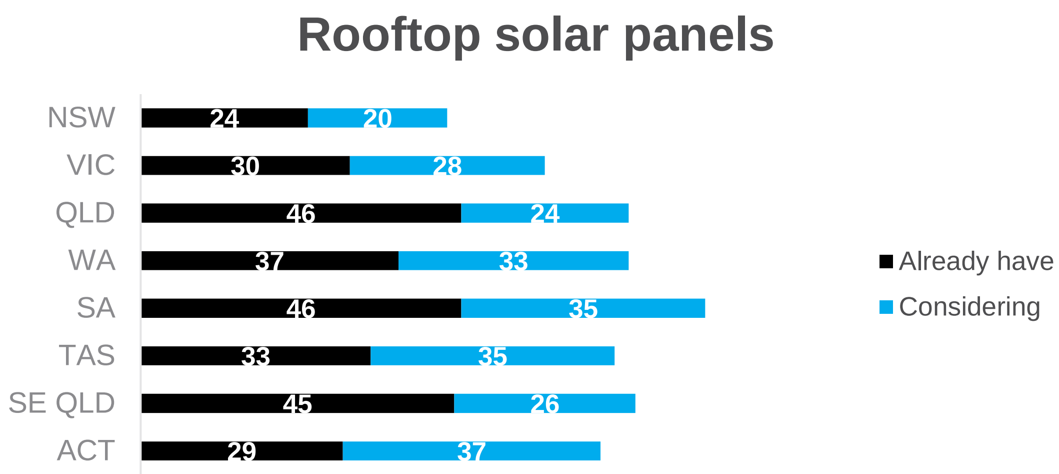
Activity

What investments are people considering

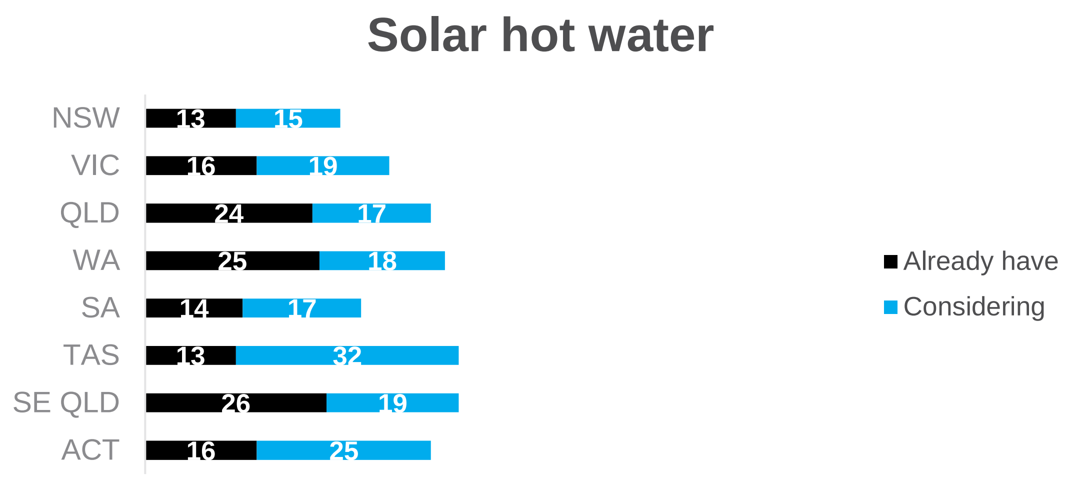
Which of the following technology do you have at your household? And which do you use to help control your energy costs?

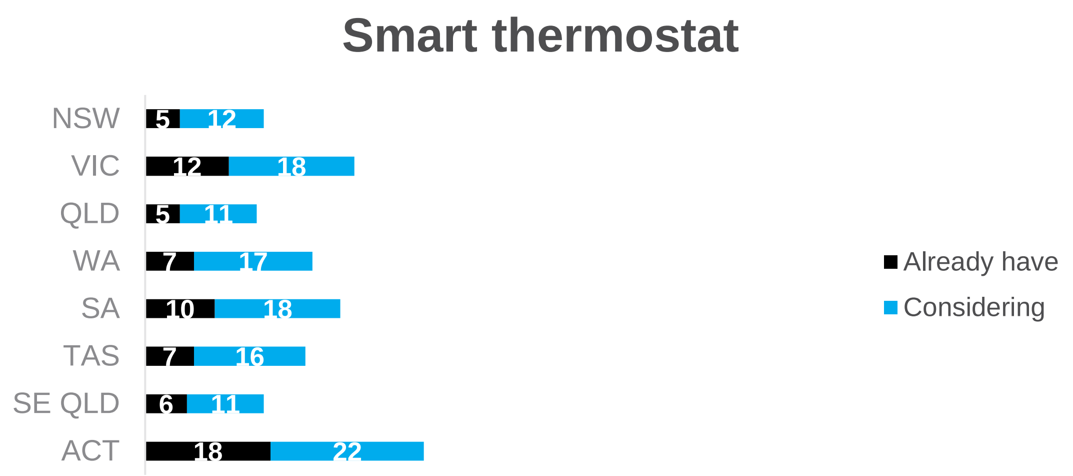
[If not] Which of the following are you intending to purchase for your home?



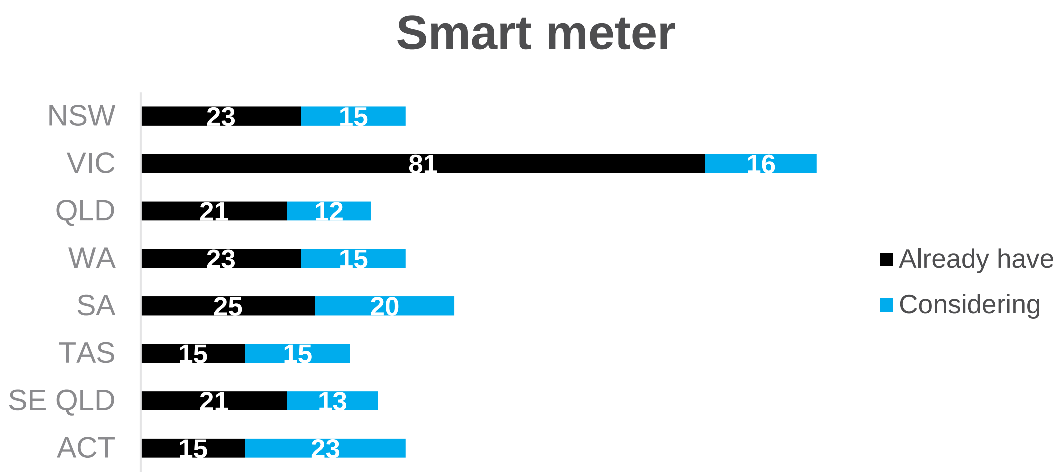


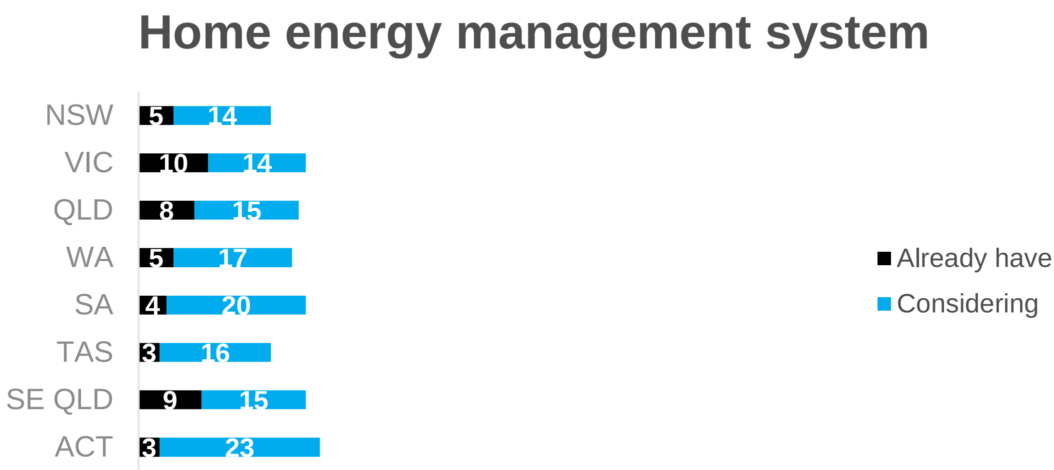
Which of the following technology do you have at your household? And which do you use to help control your energy costs?
[If not] Which of the following are you intending to purchase for your home?





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





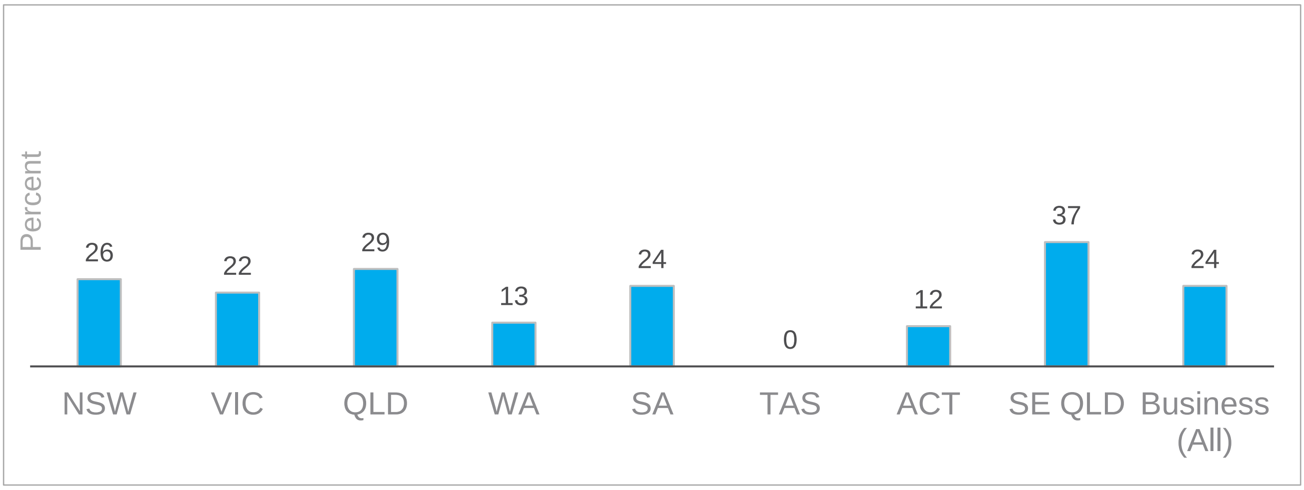
Activity

Switching in last year

Consumers in South East Queensland are the most active switchers in the past year switchers.

- The proportion of those who had switched energy companies or plans in the past year was highest in Queensland (37% in the deregulated part of the state), New South Wales (26%), South Australia (24%) and Victoria (22%).
- 24% of small business consumers reported switching energy companies or plans in the past year.

"Have you switched energy companies or plans in the past year?"



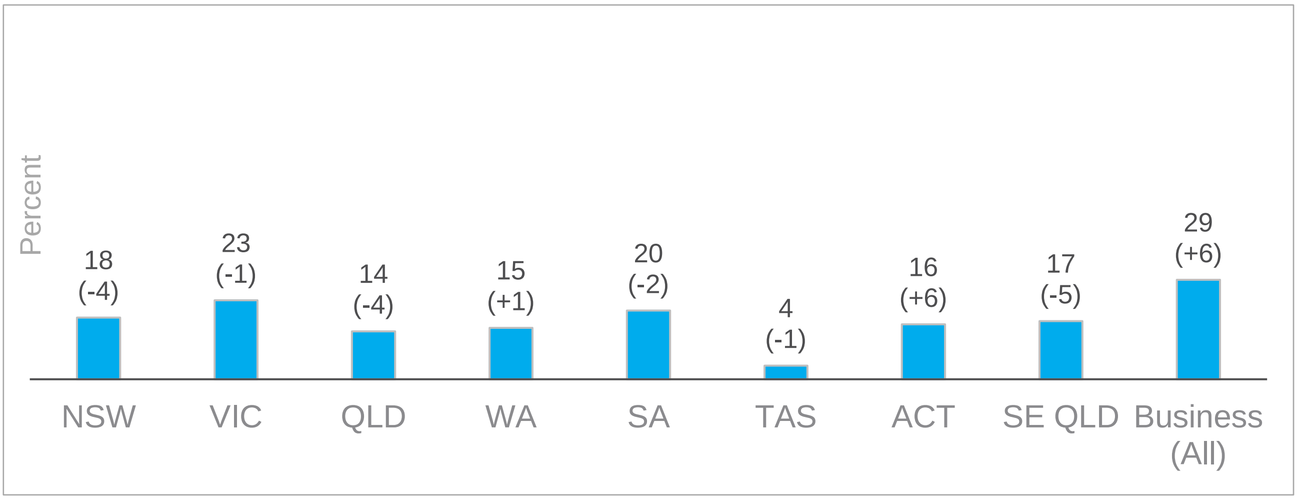
Activity

Intention to switch

Consumers' intention to switch energy retailer or switch to a new plan is highest among small business consumers

- Intention to switch in the next year was highest among Victorians (23%, down 1% from April 2017), South Australians (20%, down 2%), and small business consumers (29%, up 6%).
- There was a 6% increase in the number of ACT consumers who intend to switch in the next year (up to 16%).
- Only 4% of Tasmanians (who do not have a choice of energy retailer but have some choice of energy plan) said they intend to switch in the next year.

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

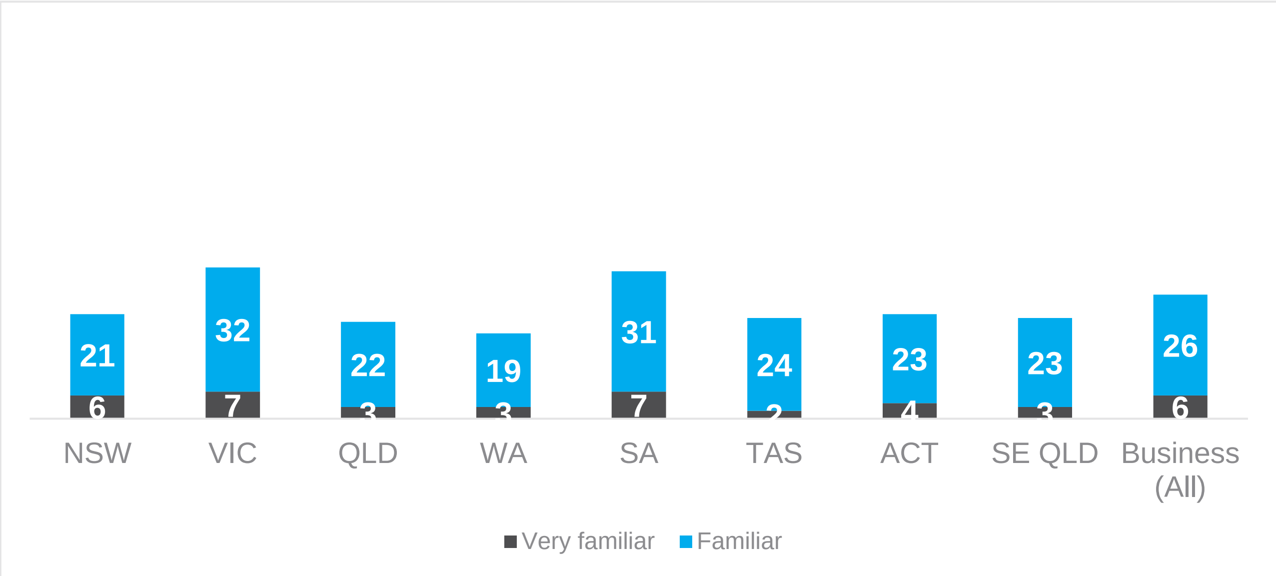


Awareness of the Energy Ombudsman

Awareness of the Energy Ombudsman is highest among Victorians and South Australians.

- Of Victorian household consumers, 39% claim to be familiar with the Ombudsman.
- At least 22% claimed familiarity with the Ombudsman across each market.

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



Small business

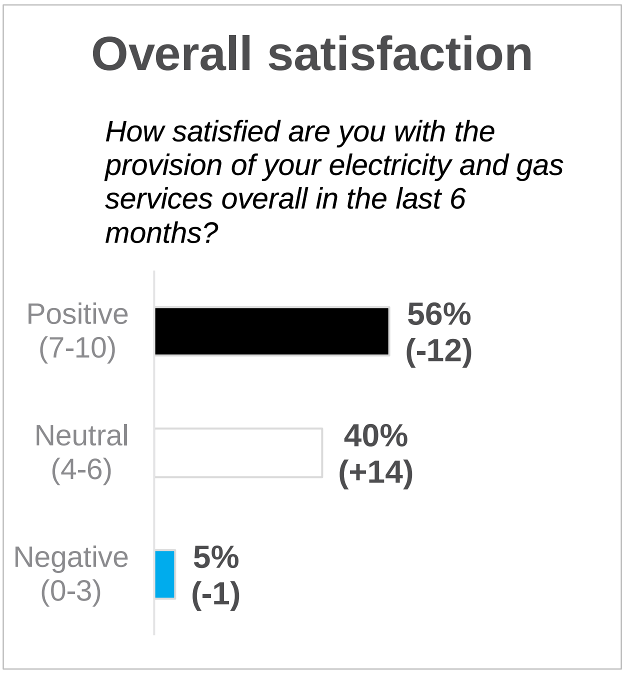
Overall satisfaction

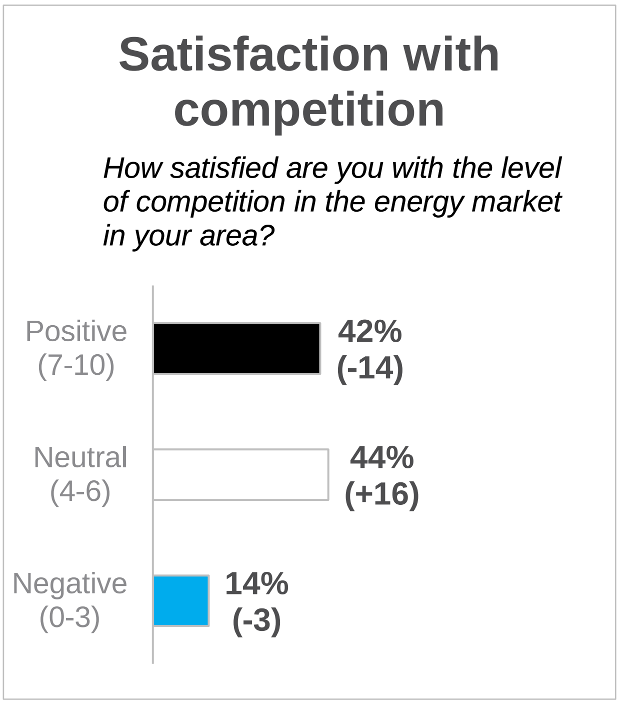
Satisfaction with electricity and gas services overall amongst small business consumers is down.

- 56% now say they are satisfied overall, down 12% since the April 2017 survey.

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

- 42% now report being satisfied, down 14%.





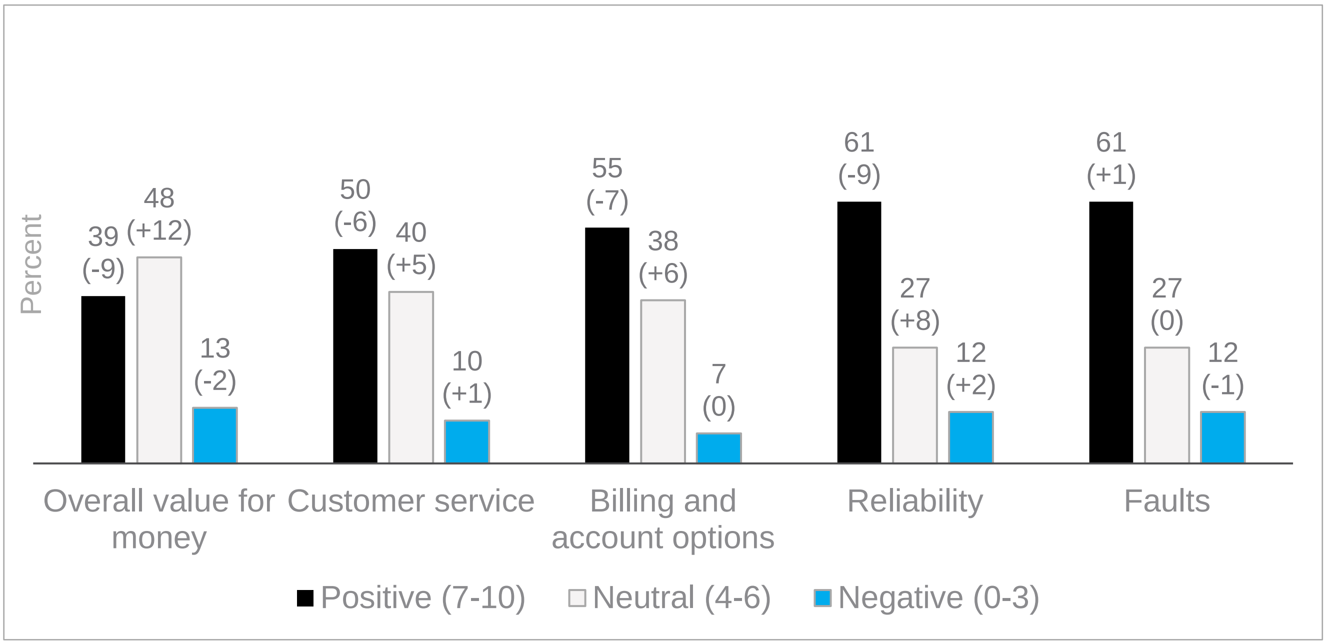
Satisfaction

Satisfaction with electricity

Ratings from small business consumers have decreased since April 2017 for four of the five satisfaction measures.

- The biggest changes are for overall value for money (down 9% to 39%) and reliability (down 9% to 61%).

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

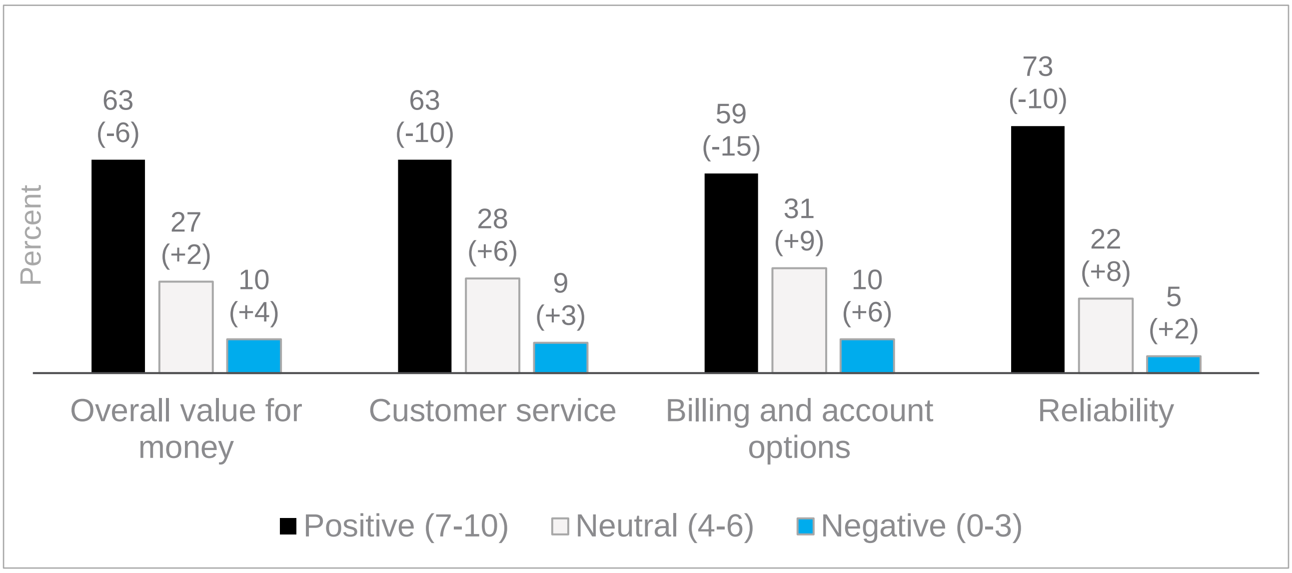


Satisfaction with gas

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

- 59% are satisfied with their billing and account options, down 15% since last year's survey
- 63% are satisfied with their customer service, down 10%.
- 73% are satisfied with their reliability, down 10%.
- 63% are satisfied with their overall value for money, down 6%.

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



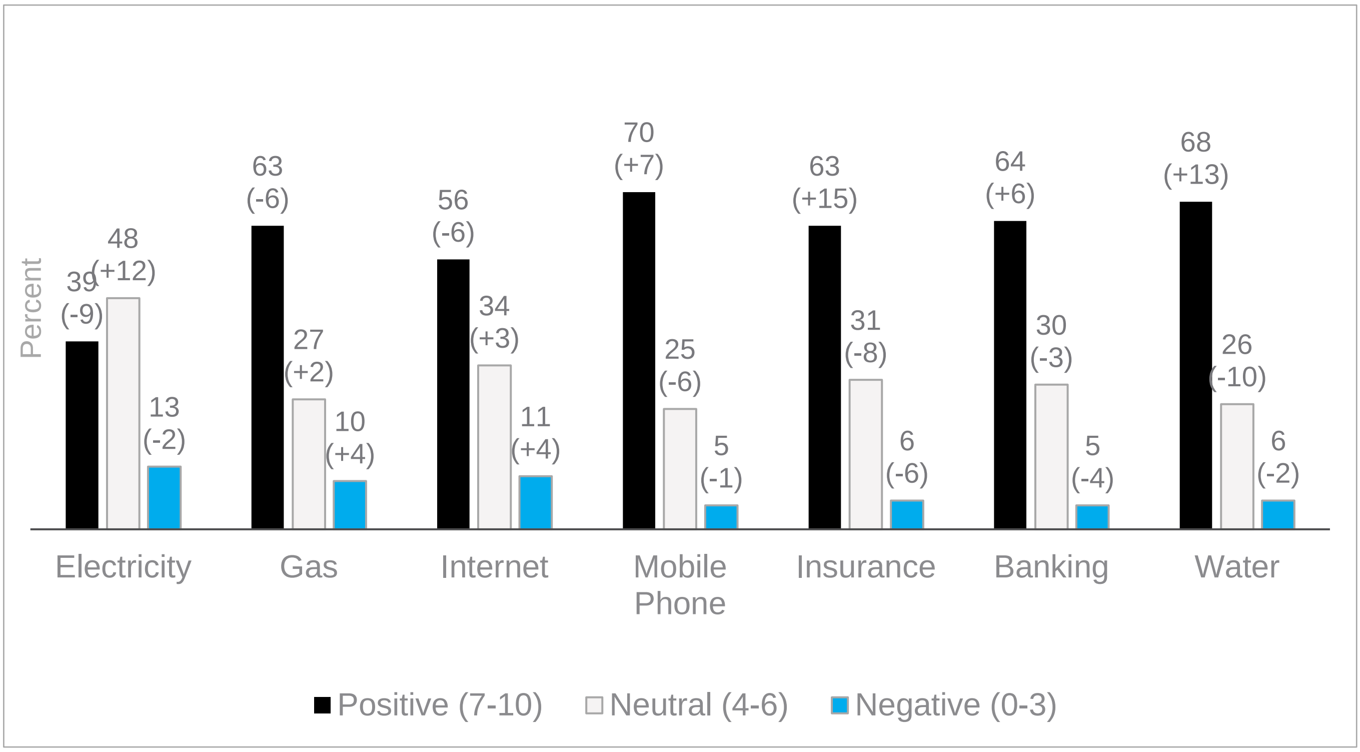
Base: Small business consumers with gas (n=153)

Satisfaction with utilities and services

Satisfaction in terms of value for money has decreased for gas and electricity but increased for most other utilities and services.

- The proportion of small business consumers satisfied with the value for money of their electricity service is down 9%, to 39%.
- The largest increases in satisfaction across the same time were for insurance (up 15% to 63%) and water (up 13% to 68%).

"How would you rate the overall value for money of the products and services provided by your service provider in the following areas, in the past 6 months"
0-10 scale, 0='very poor', 10='excellent'



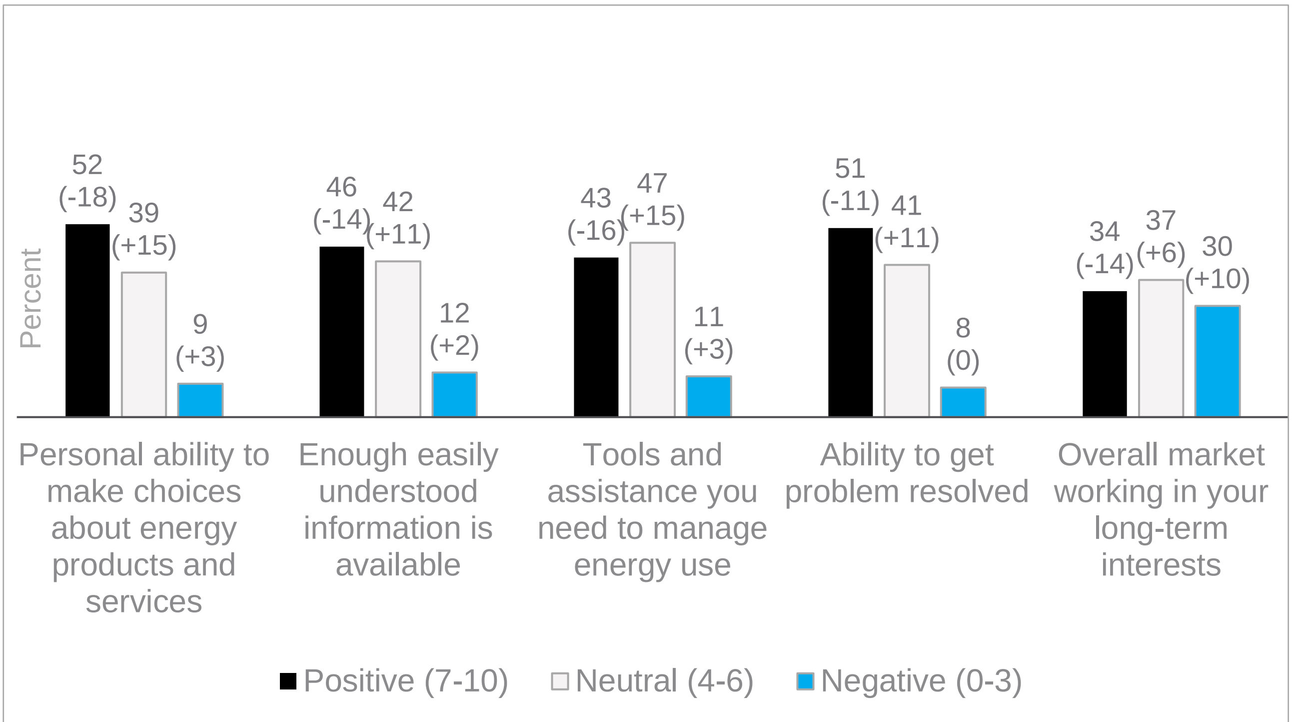
Confidence

Confidence in information, tools and a working market

Confidence in each of the below measures have decreased.

- The largest decrease was seen in small business consumers' confidence in their personal ability to make choices about energy products (down 18% to 52%).
- We also saw drops in small business consumer confidence that there is enough easily understood information about energy available (down 14% to 46%) and the availability of tools and assistance to manage energy use (down 16% to 43%).
- Only 34% of small business consumers now think the overall market is working in their interests (down 14%).

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



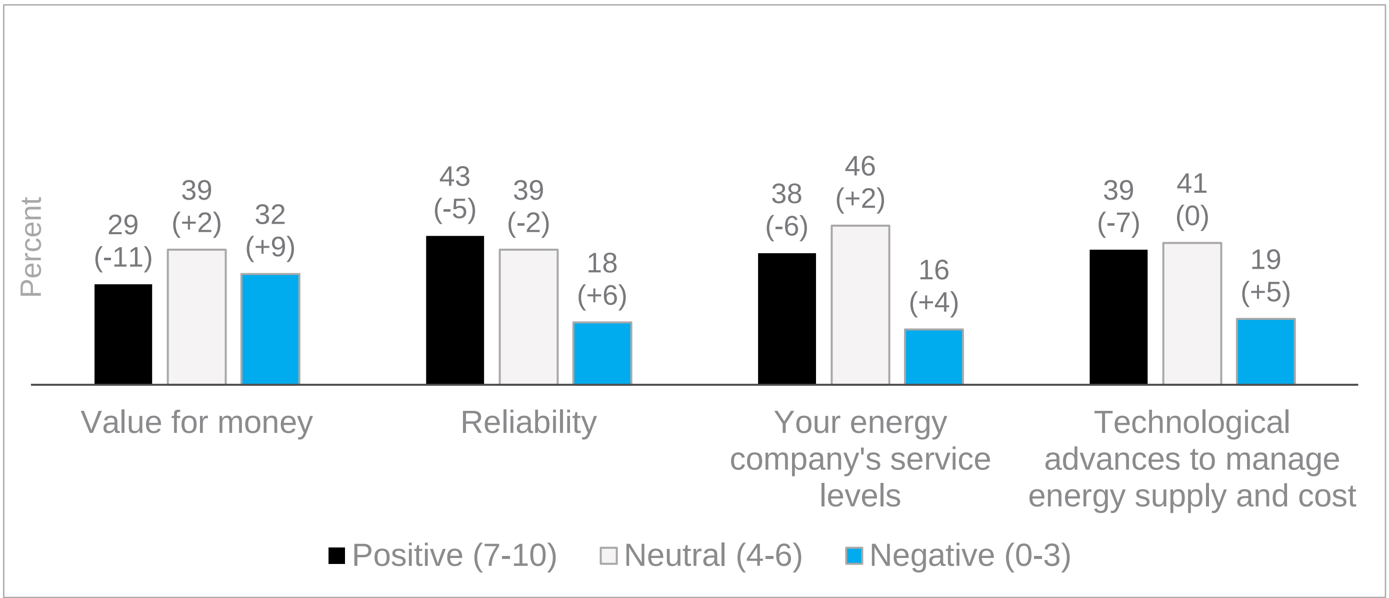
Confidence in long-term outcomes

Small business consumers in the latest survey were less likely to express confidence in the long-term outcomes provided by the energy market.

- The proportion confident that the market will deliver better value for money in the long term is down 11% since April 2017, to 29% in total.
- There is also a 7% decrease in the proportion confident in the market delivering technological advances to manage energy supply and cost in the long-term (now 39%).
- There were smaller changes for confidence in future reliability (down 5% to 43%) and service levels (down 6% to 38%).

Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of…?

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



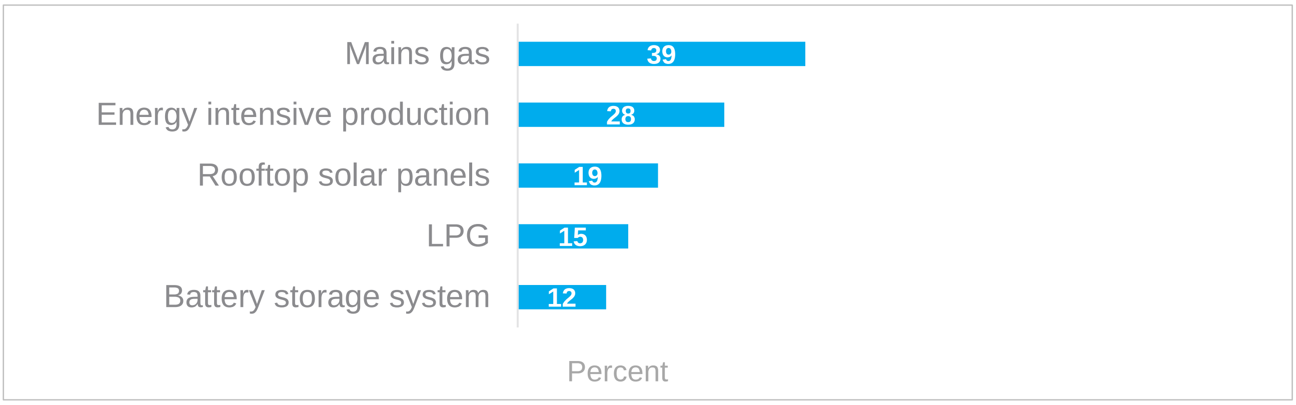
Activity

Uptake of technologies

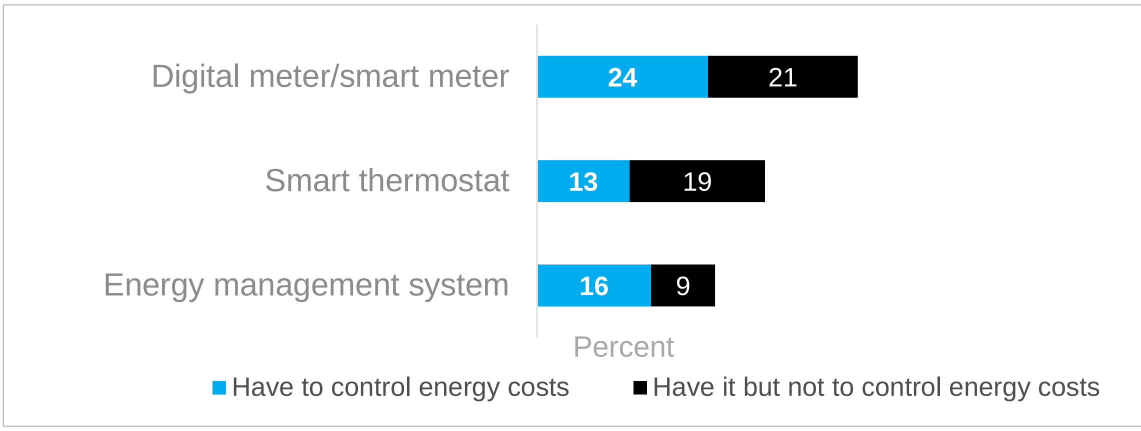
Small business consumers in this survey were asked about the technologies they have in their place of business, and which technologies are used to control energy costs.

- 45% of small businesses say they have a digital/smart meter, but only 24% say they use it to control energy costs.
- 32% say they have a smart thermostat, with 13% using it to control energy costs. 25% say they have an energy management system, and 16% use it to control energy costs.

Which of the following do you have in your place of business?



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



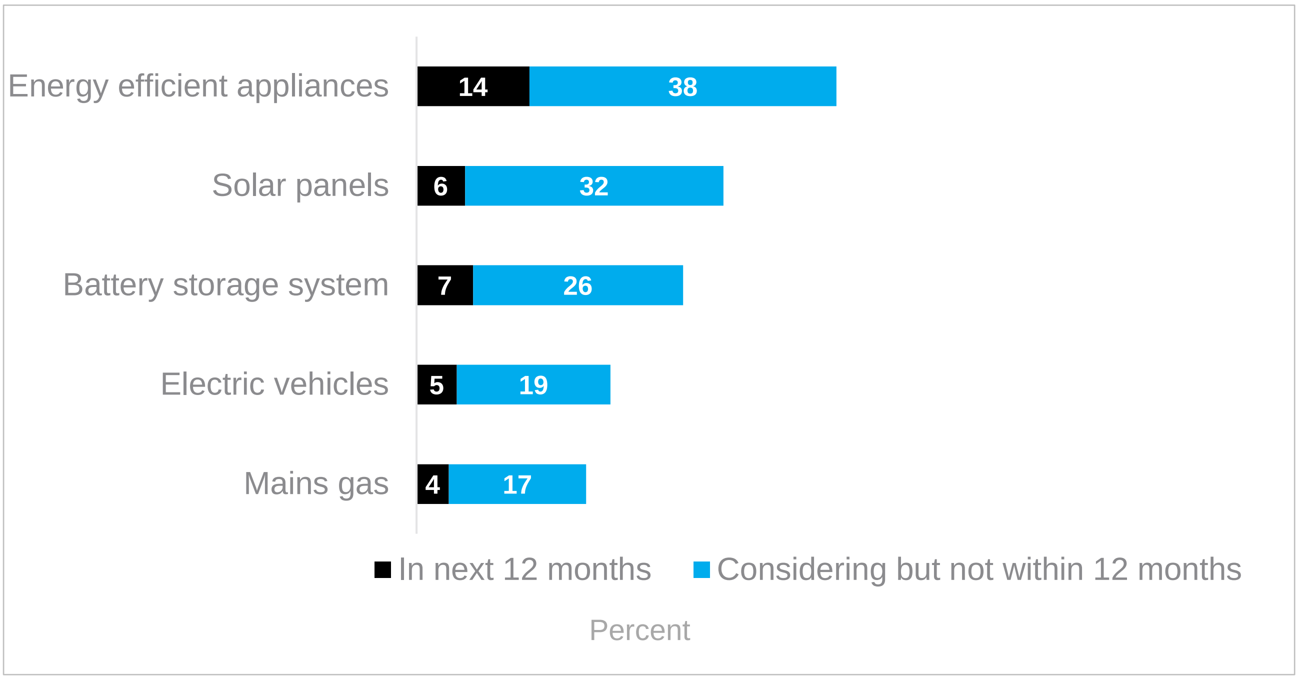
Activity

Future uptake of technologies

Most small business consumers who are intending to purchase one of the below listed technologies are not planning to do so in the next 12 months.

- 52% say they are intending to purchase energy efficient appliances for their business, but only 14% say they are planning to do so in the next 12 months.
- 38% say they are planning to purchase solar panels, but only 6% intend to do so in the next 12 months and similarly, 33% say they intend to purchase battery storage, but only 7% intend to do to so in the next 12 months.

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



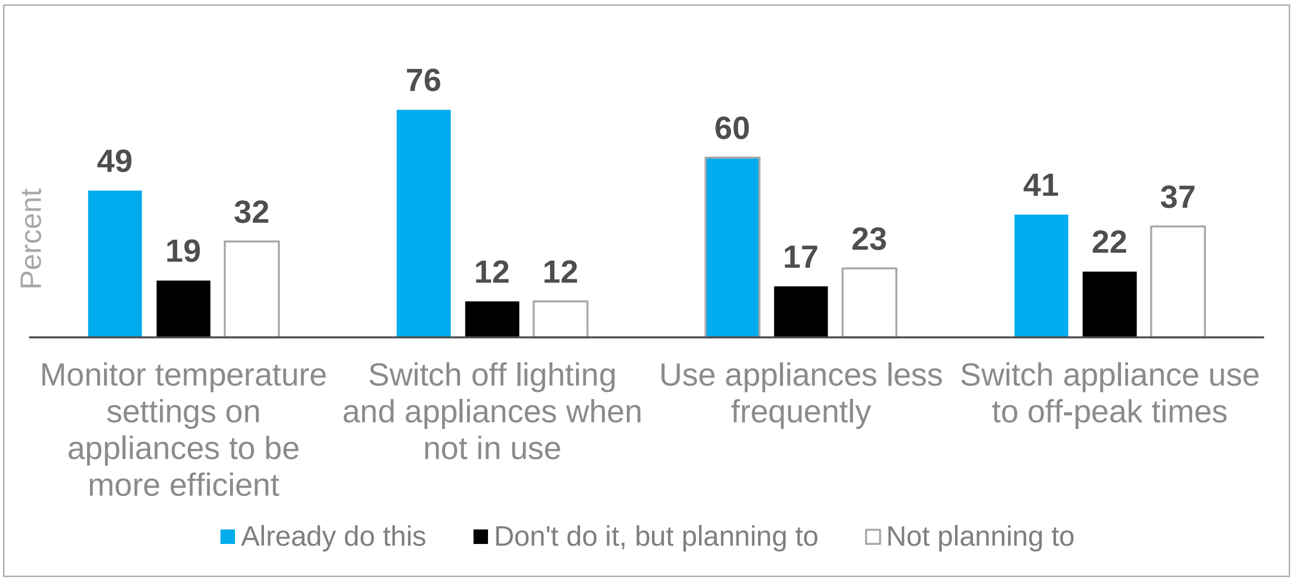
Activity

Reducing energy use

Most small business consumers take steps, or are planning to take steps, to reduce their energy use.

- 76% switch off lighting and appliances when not in use, and 60% are using appliances less frequently.
- 49% of small business consumers are monitoring temperature settings on appliances
- 41% say they are switching appliance use to off-peak times.

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



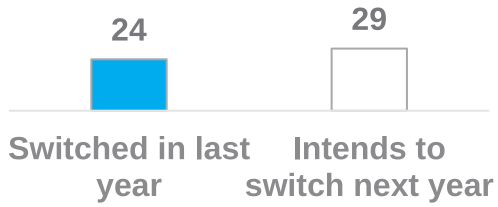
Activity

Reasons for considering switching

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

- 24% switched energy companies or plans in the last year, and 29% intend to switch in the next year
- 40% of those who switched companies in the last year say that they were dissatisfied with the value for money they received.

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



Base: All small business consumers (n=281)

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

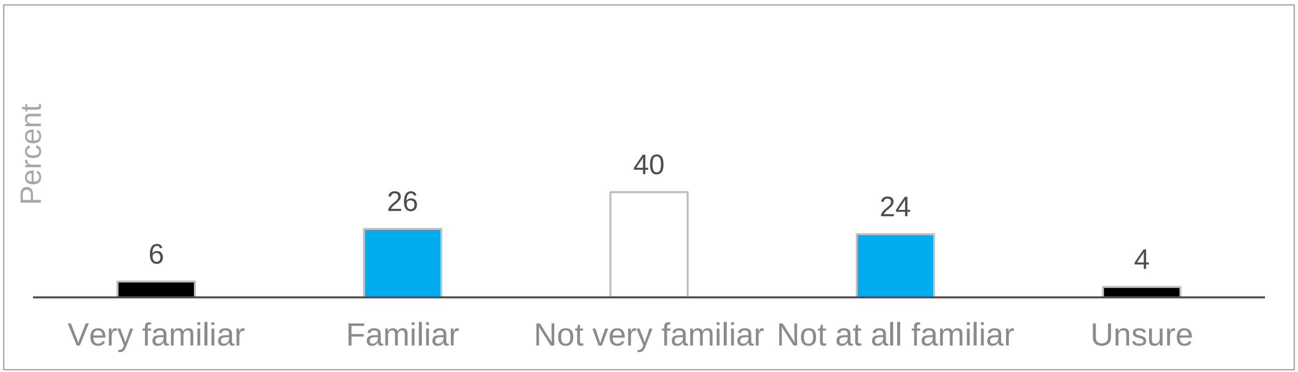
Note small sample size: Small business consumers who switched providers in the last three years (n=60)

Other

Awareness of the Energy Ombudsman

32% say they were ‘very familiar’ or ‘familiar’ with the Energy Ombudsman.

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



New South Wales

Satisfaction

Overall satisfaction

Satisfaction with energy services among NSW household consumers was largely unchanged compared with last year's survey.

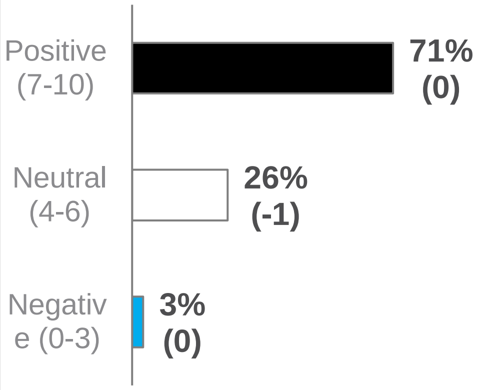
- 71% are satisfied, unchanged from April 2017.

Satisfaction with the level of competition is down.

- 45% say they are satisfied with the level of competition, down 10% since April 2017.

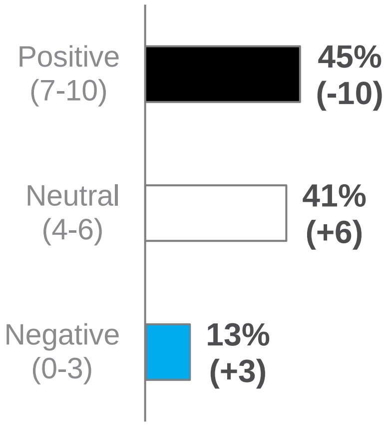
Overall satisfaction

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



Satisfaction with competition

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



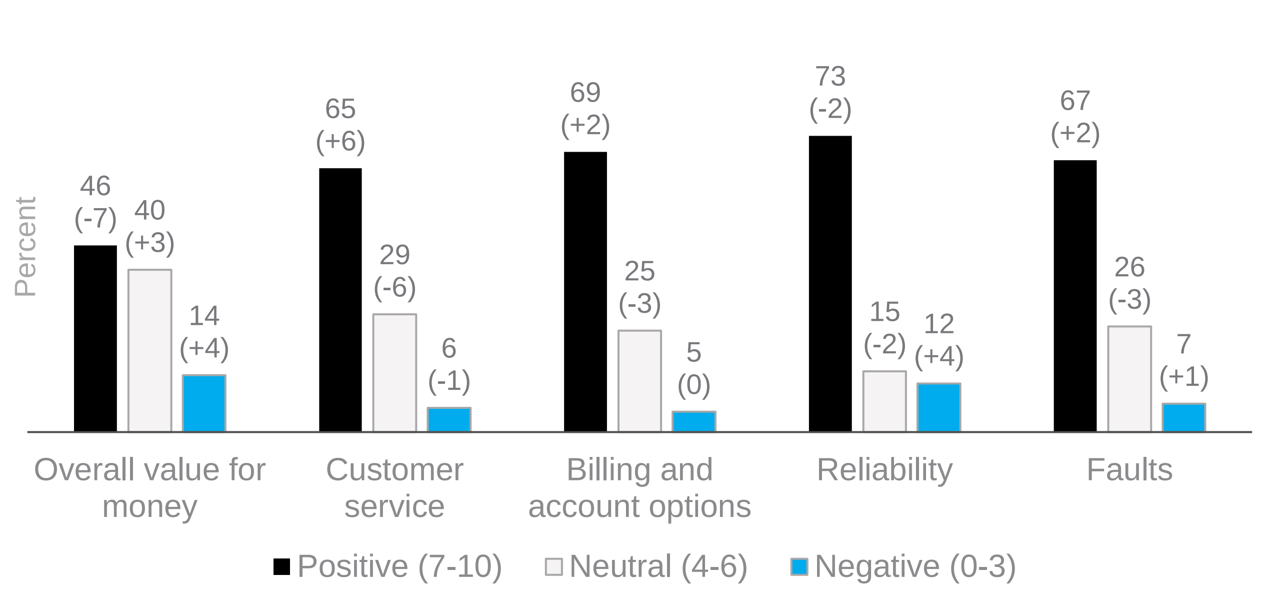
Satisfaction

Satisfaction with electricity

Satisfaction value for money has decreased in NSW.

- Satisfaction with overall value for money is down 7% to 46%.
- Satisfaction with customer service is up 6% to 65%.

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



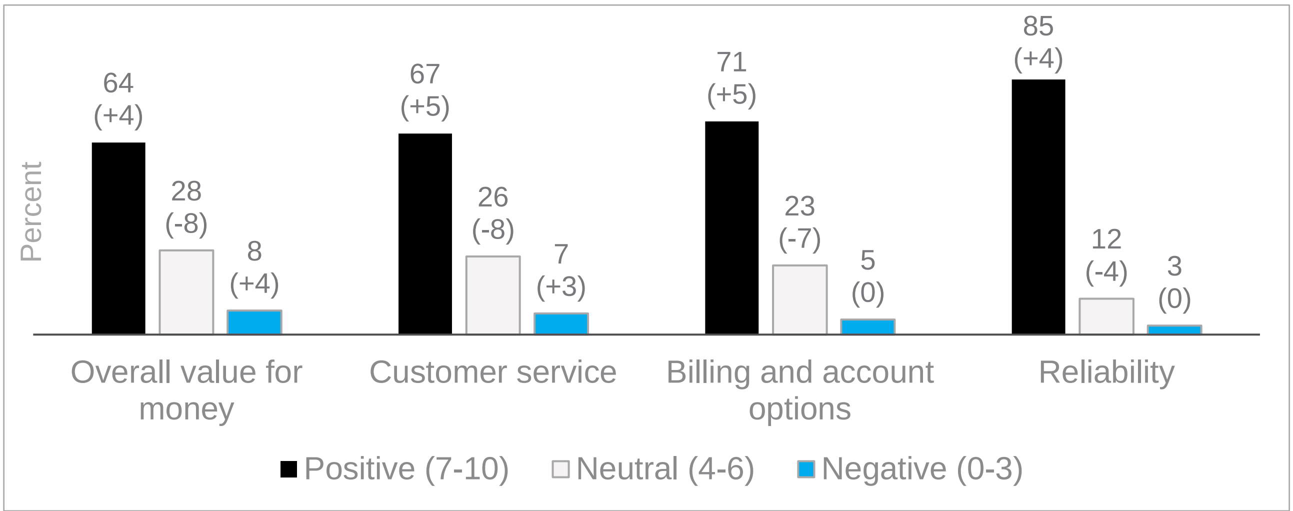
Satisfaction

Satisfaction with gas

Satisfaction with gas has increased across most measures for NSW household consumers since last year's survey

- 64% are satisfied with the value for money they get for gas, up 4% since April 2017.
- 67% are satisfied with their gas company's customer service (up 5%).
- 85% are satisfied with the reliability of gas (up 4%).
- 71% are satisfied with the billing and account options (up 5%).

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



Base: New South Wales consumers with gas (n=226)

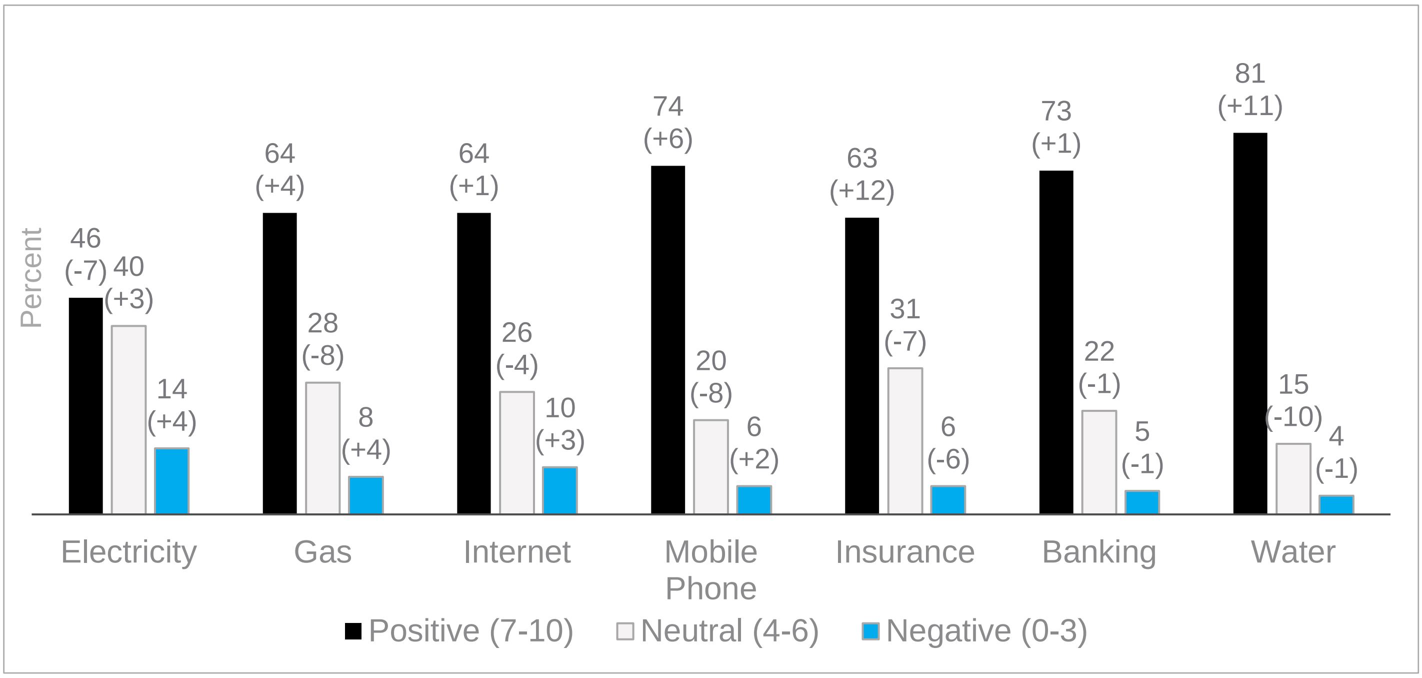
Satisfaction

Satisfaction with utilities and services

Satisfaction among NSW household consumers has increased for all utilities and services in the survey except for electricity

- With a satisfaction rating of 46% (down 7%), electricity has a lower satisfaction than all other utilities and services, with insurance the next lowest at 63% (up 12%).
- With 64% satisfied (up 4%), satisfaction with gas is comparable with that of internet and insurance 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'



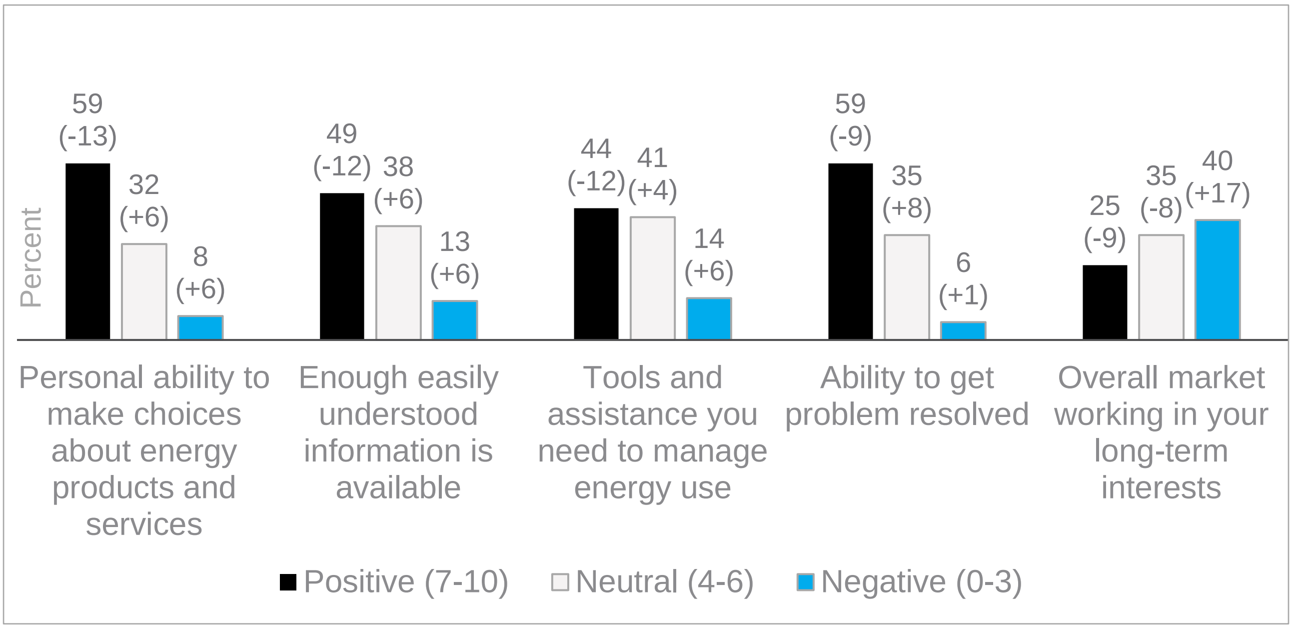
Confidence

Confidence in information and tools

Confidence among NSW consumers in the information and tools available to help them make decisions about energy has decreased across all measures and overall confidence in the market is also down

- 59% are confident in their personal ability to make choices about energy (down 13%).
- 49% say they are confident in there being enough easily understood information (down 12%).
- 44% are confident in the tools and assistance needed to manage energy use (down 12%).
- Only 25% of NSW household consumers are confident the overall energy market is working in their long-term interests (down 9%).

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



Confidence

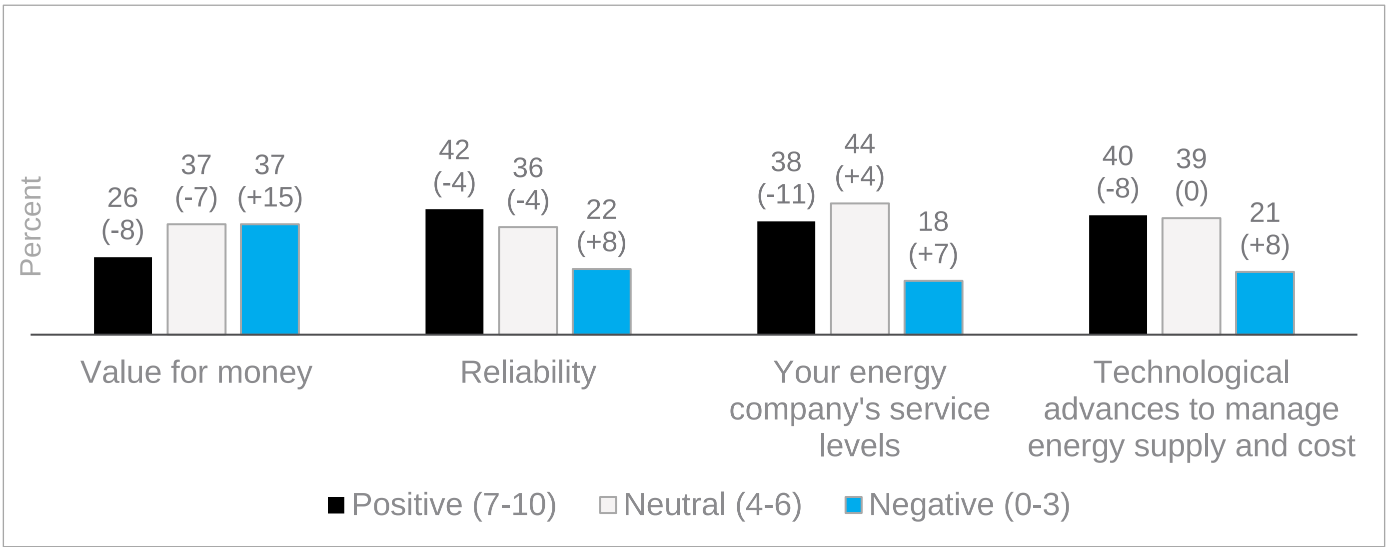
Confidence in long term outcomes

Consumer confidence in long term outcomes has decreased since April 2017

- 26% of NSW household consumers say that they are confident in long-term outcomes for value for money (down 8%).
- 38% say they are confident in long-term outcomes for their energy company's service levels (down 11%).
- 40% say that they are confident in long-term outcomes for technological advances to manage energy supply (down 8%).

Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of:

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



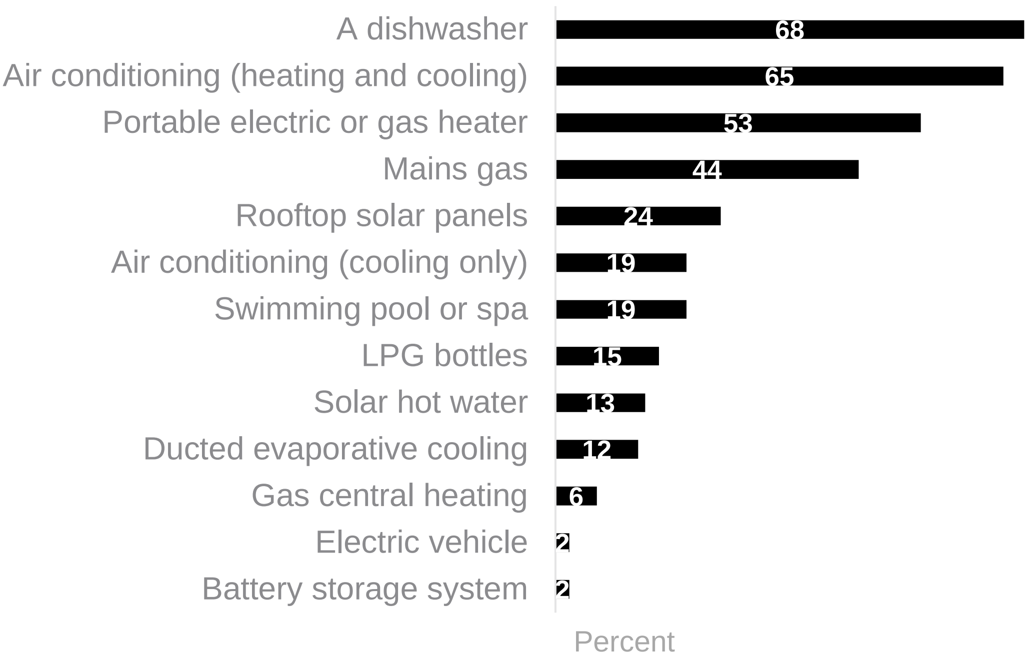
Activity

Use of technologies

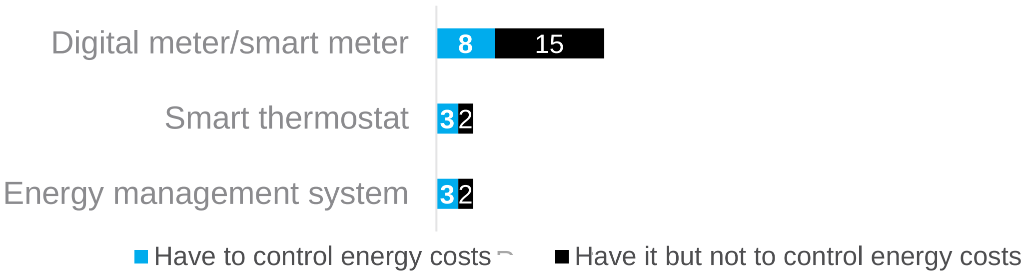
The most common technologies and appliances in NSW consumers' households are dishwashers (68%), air conditioning for heating and cooling (65%) and portable heaters (53%).

While 23% say they have a digital/smart meter, less than half (8%) say they use it to manage their energy use and costs.

Which of the following do you have at your home?



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



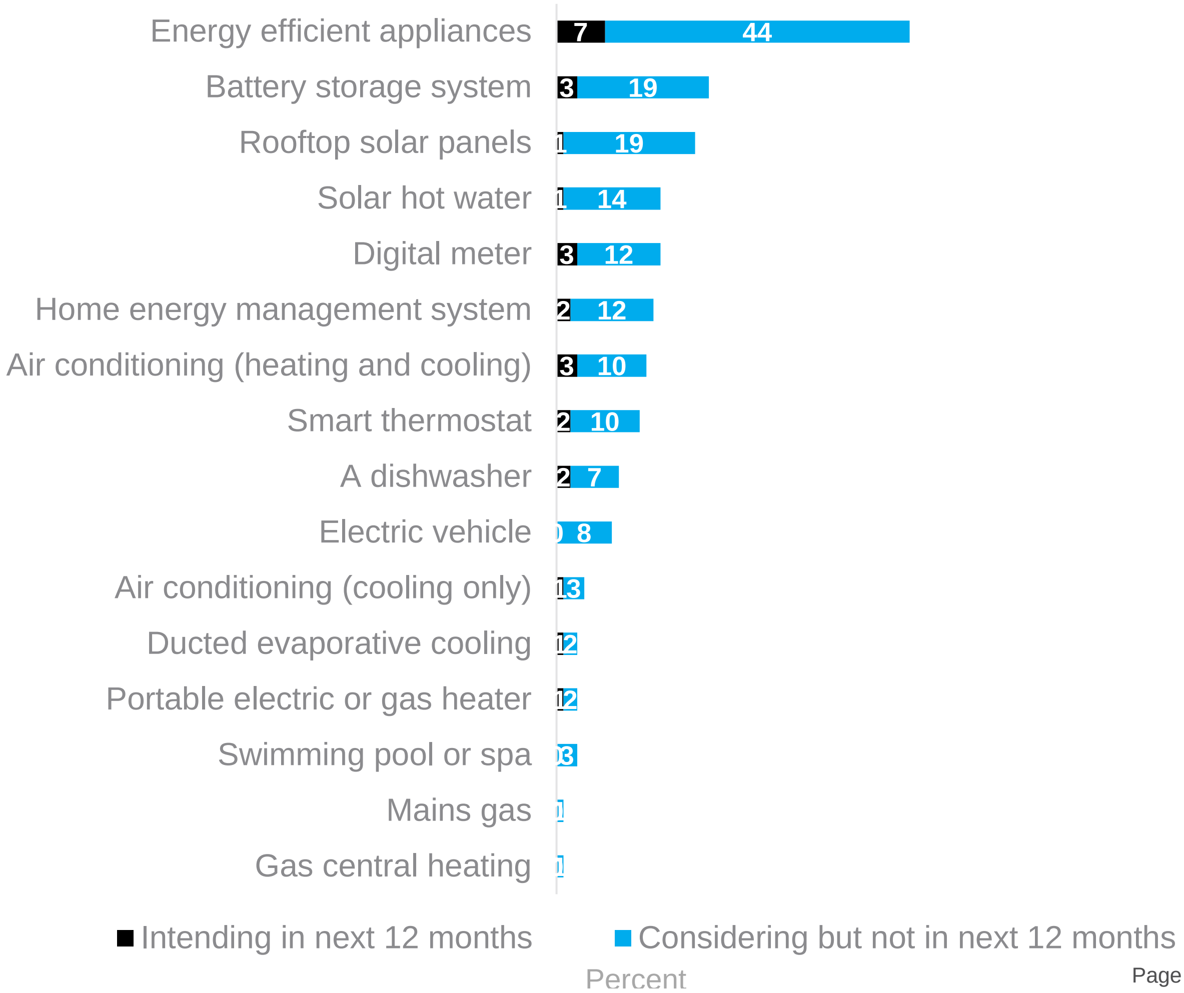
Activity

Uptake of technologies

NSW household consumers show interest in purchasing more energy efficient appliances, but not in the next year.

- 51% say that they are intending to purchase energy efficient appliances, but only 7% plan to do so in the next 12 months
- 22% say they are intending to purchase a battery storage system, and 20% plan to purchase rooftop solar panels.

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



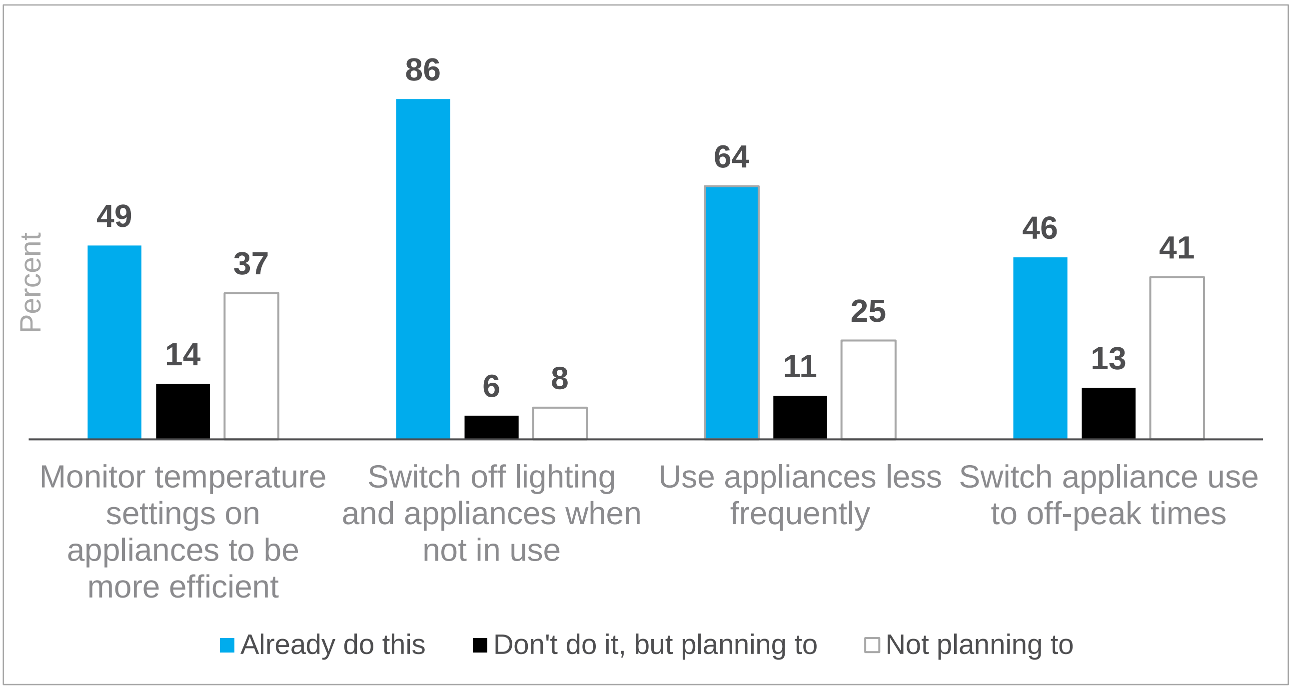
Activity

Energy saving practices

NSW household consumers are taking steps to limit their energy use.

- 86% say that they already switch of lighting and appliances when not in use.
- 64% say they already using appliances less frequently to conserve energy.
- 46% say they already switch appliance use to off-peak times.

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



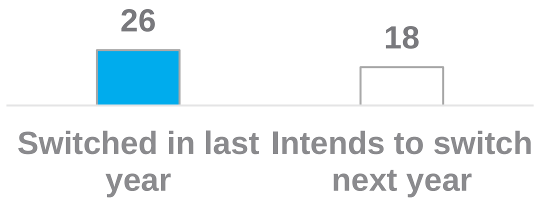
Activity

Reasons for considering switching

Dissatisfaction with customer service is a main driver for switching activity among NSW consumers

- 39% of those who switched in the last 3 years said that they were unhappy with the customer service on their old company at the time.
- 26% say they switched energy companies or plans in the last year, and 18% intend to switch in the next year.

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



Base: All consumers (n=401)

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

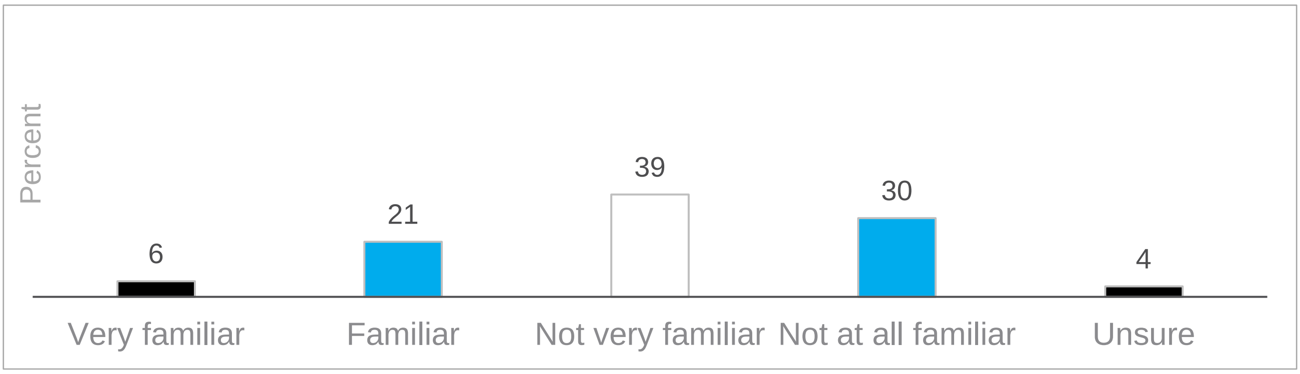
Base: Consumers who switched retailers in the last three years (n=74)
Note small sample size

Other

Awareness of the Energy Ombudsman

27% said they were familiar with the Energy Ombudsman.

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



Victoria

Satisfaction

Overall satisfaction

Victorian household consumers in this survey were somewhat less likely than those in April 2017 to say they are satisfied with the provision of electricity and gas services overall.

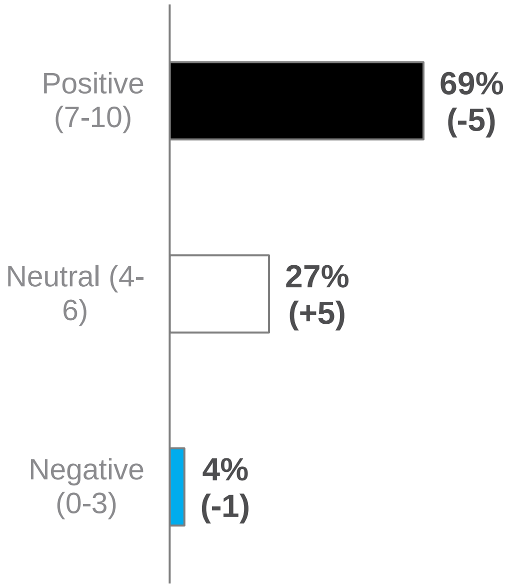
- 69% are satisfied with their electricity and gas services, down 5% since last year's survey.

Satisfaction with the level of competition has also decreased.

- 50% are positive about the level of competition in the energy market in their area, down 8%.

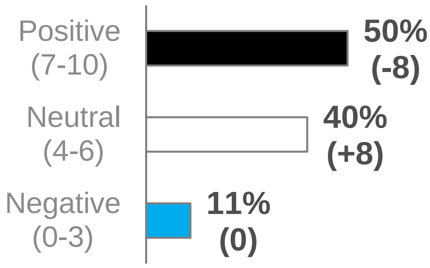
Overall satisfaction

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



Satisfaction with competition

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



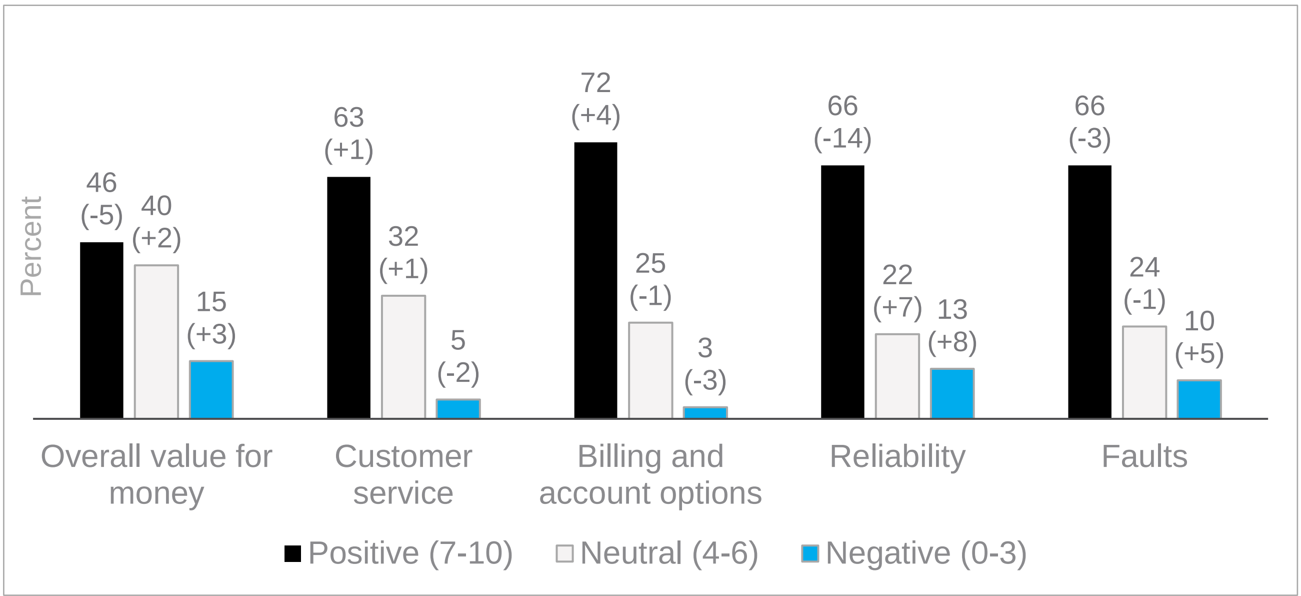
Satisfaction

Satisfaction with electricity

Victorian household consumers in this survey are less satisfied with value for money outcomes from electricity services than last year and for reliability outcomes

- 46% are satisfied with overall value for money of their electricity service, down 5%.
- 66% are satisfied with the reliability of their electricity, down 14%.

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

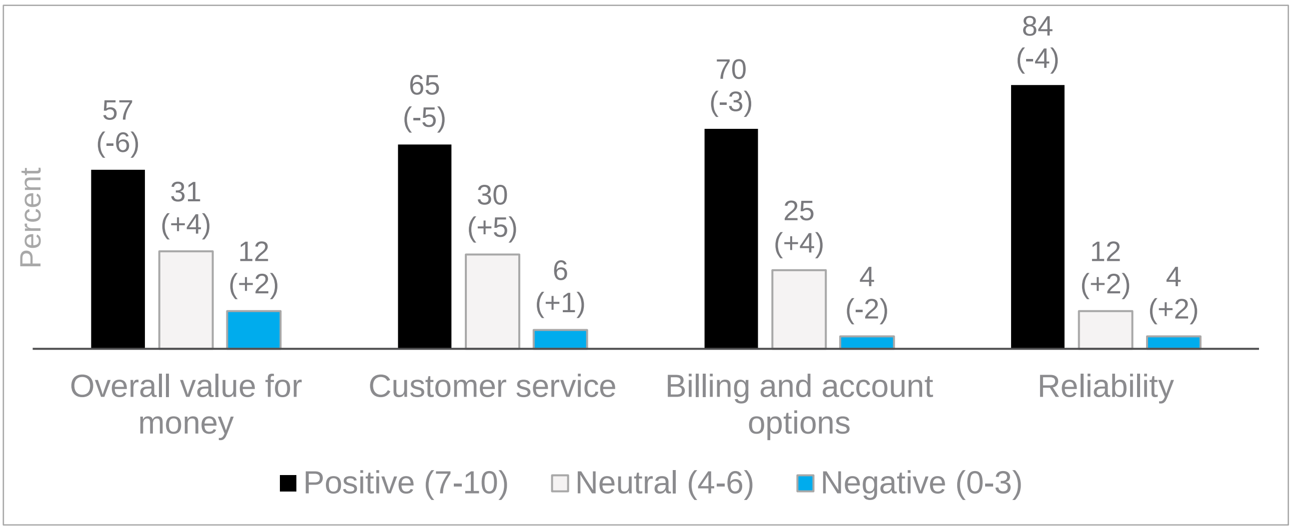


Satisfaction with gas

Satisfaction with gas has decreased across all measures since last year

- 57% are satisfied with the value for money of their gas service, down 6% from April 2017.
- 65% are satisfied with the reliability of their customer service, down 5%.

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



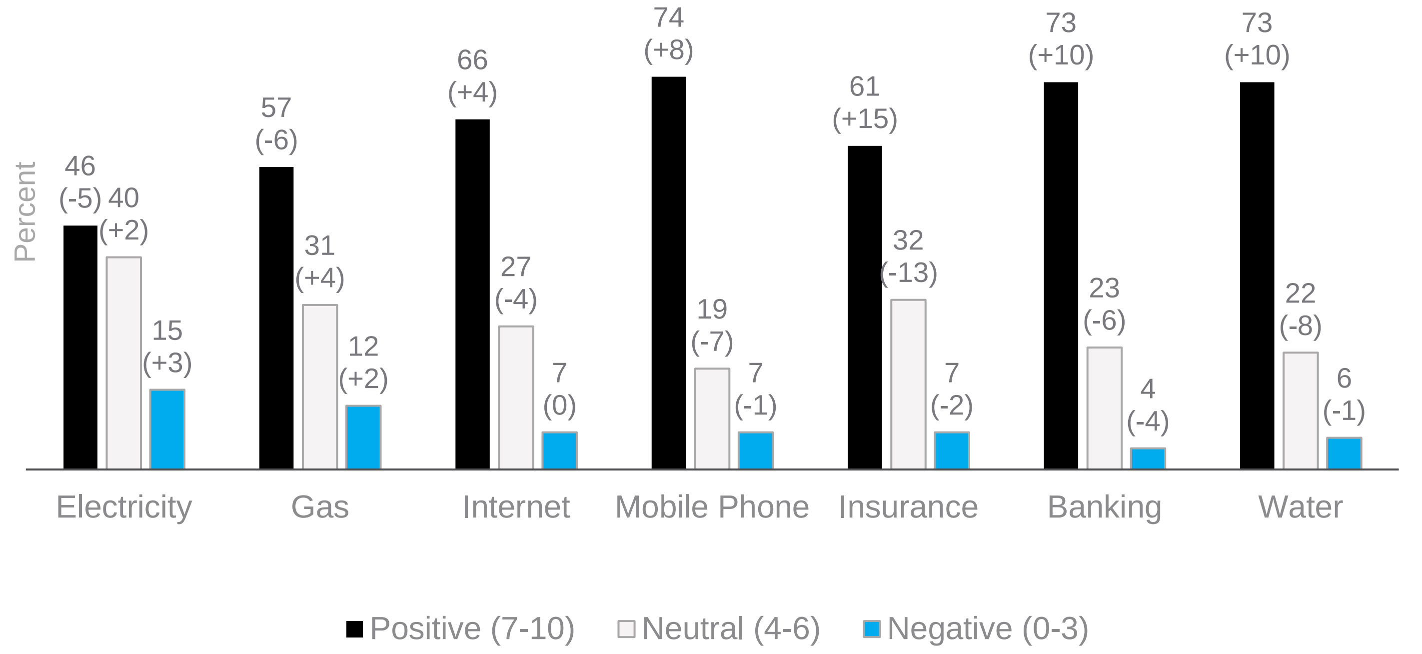
Base: Victorian consumers with gas (n=342)

Satisfaction with utilities and services

In terms of value for money, satisfaction has decreased for both electricity (down 5% to 46%) and gas (down 6% to 57%), while it has increased for other utilities and services in the survey.

- The largest increases were for insurance (up 15% to 61%), banking (up 10% to 73%) and water (up 10% to 73%).

"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'



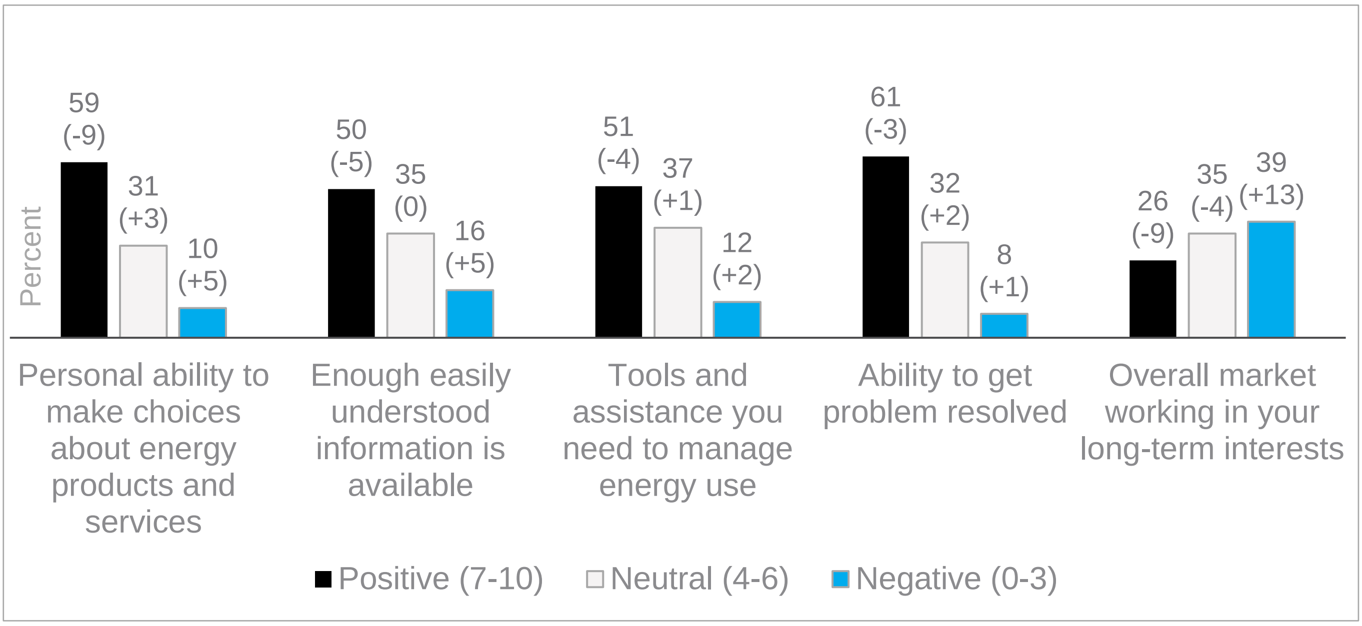
Confidence

Confidence in information and tools

Confidence in information and tools is down across all measures among Victorian consumers.

- 26% are confident that the overall market is working in their long-term interests, down 9% from April 2017.
- 59% are confident about their personality ability to make choices about energy, down 9%.

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



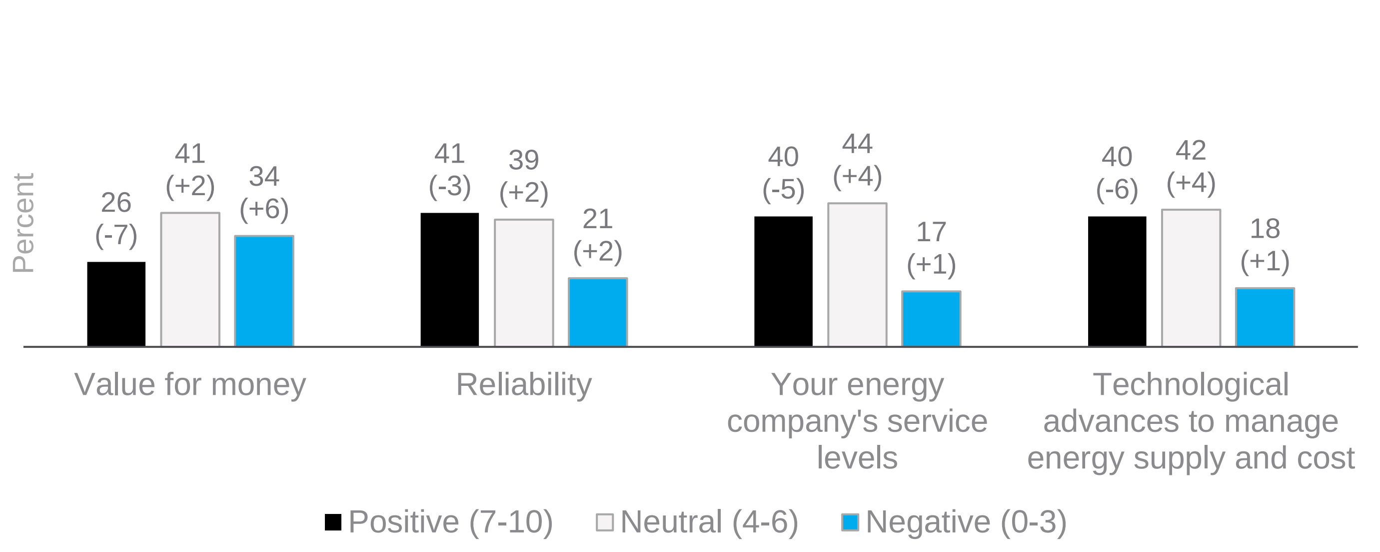
Confidence

Confidence in long term outcomes

Confidence for long term outcomes is down across all measures.

- 26% say that they are confident that the market will deliver better value for money, down 7% since April 2017.
- 40% now say that they are confident that the market will deliver technological advances to manage energy supply and costs (down 6%).

Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of:
0-10 scale, 0='not at all confident', 10='very confident'



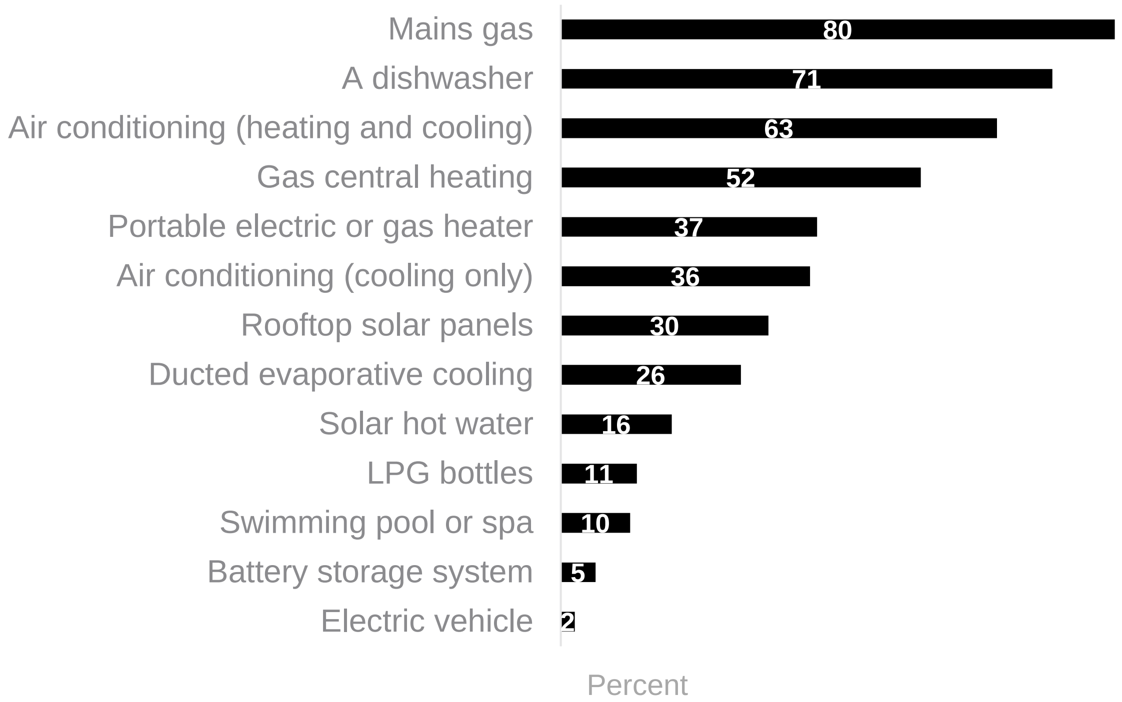
Activity

Use of technologies

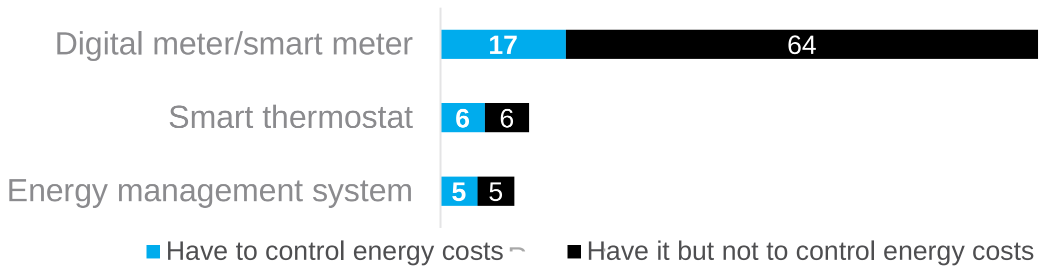
Mains gas installation is prevalent among Victorian households

- 80% say that they have mains gas in their household.
- 81% report having a smart/digital meter although only 17% say they use it to manage their energy costs.

Which of the following do you have at your home?



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



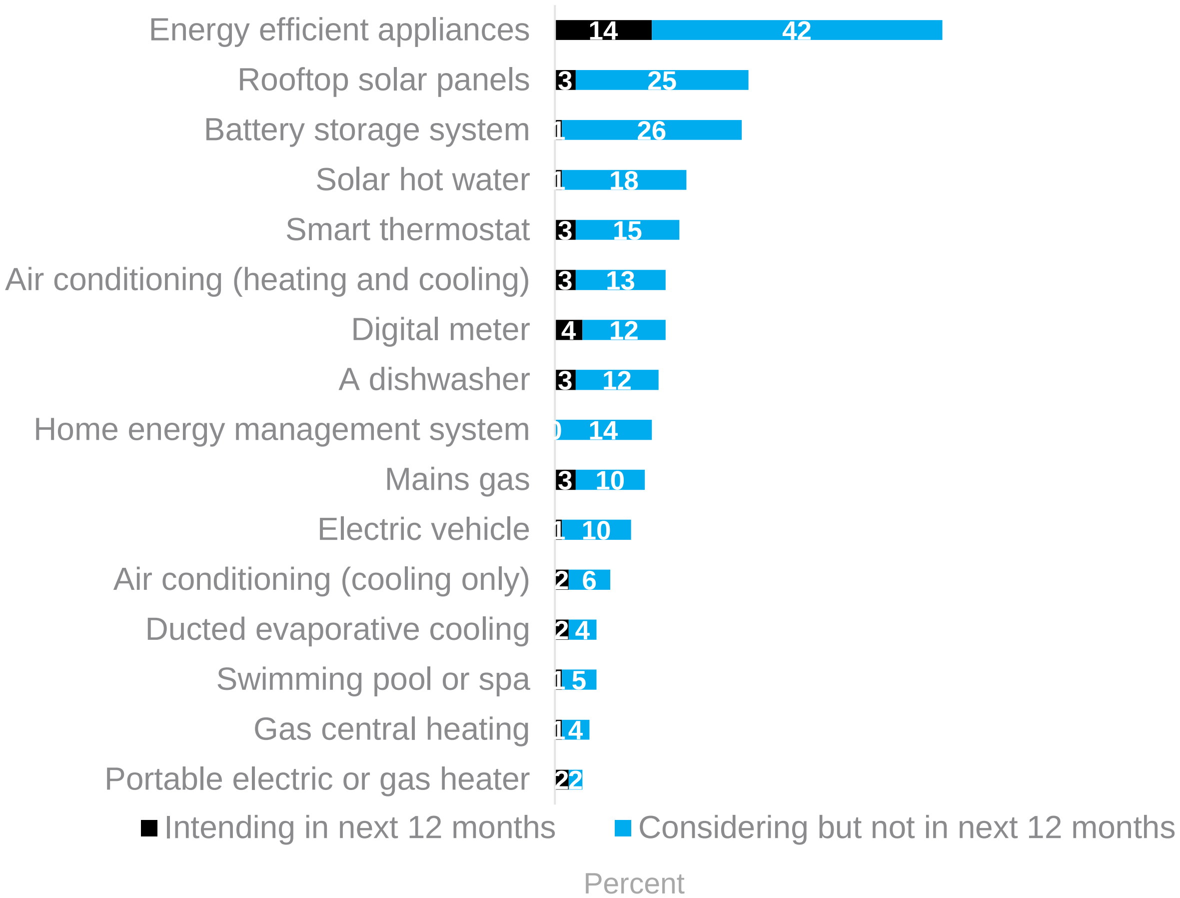
Activity

Uptake of technologies

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

- 56% say that they are considering purchasing energy efficient appliances, but only 14% intend to purchase them in the next 12 months.
- 28% claim to be considering rooftop solar panels, but only 3% intend to do so in the next 12 months.

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



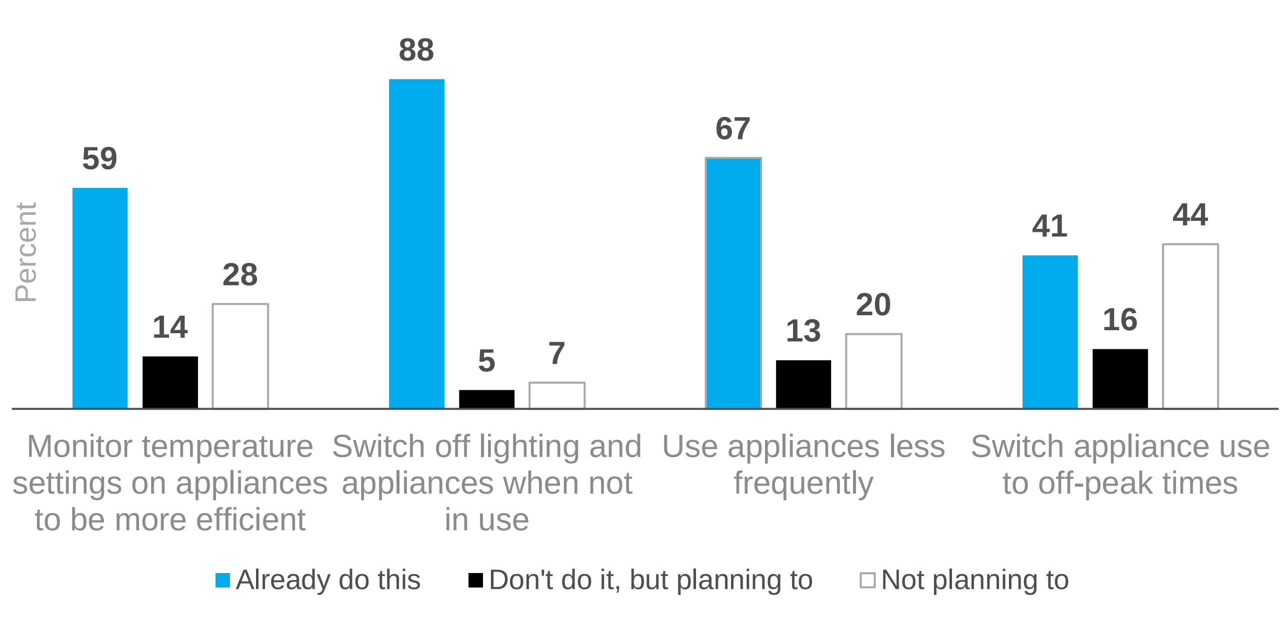
Activity

Energy saving practices

Victorian consumers are already taking measures to reduce their energy usage.

- 88% say that they already switch off lights and appliances when not in use.
- 41% say they have shifted their appliance usage to off-peak times.

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



Activity

Reasons for considering switching

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

- 34% of those who switched companies in the last 3 years said that at the time they were dissatisfied with the value for money they received.
- 22% of all Victorian household consumers switched energy companies or plans in the last year, and 23% say they intend to switch in the next year.

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

Did you witch energy companies or plans in the last year /Do you intend to switch energy companies or energy plans in the next year?

Base: All consumers (n=402)

Base: Consumers who have switched retailers in the last 3 years (n=92)

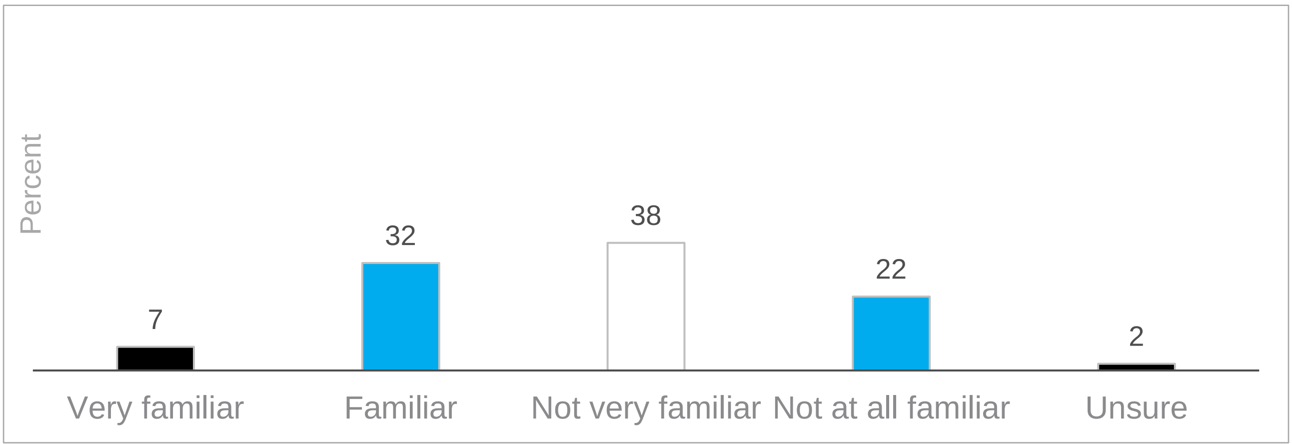
Note small sample size

Other

Awareness of the Energy Ombudsman

39% say they are familiar with the Energy Ombudsman.

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



Queensland

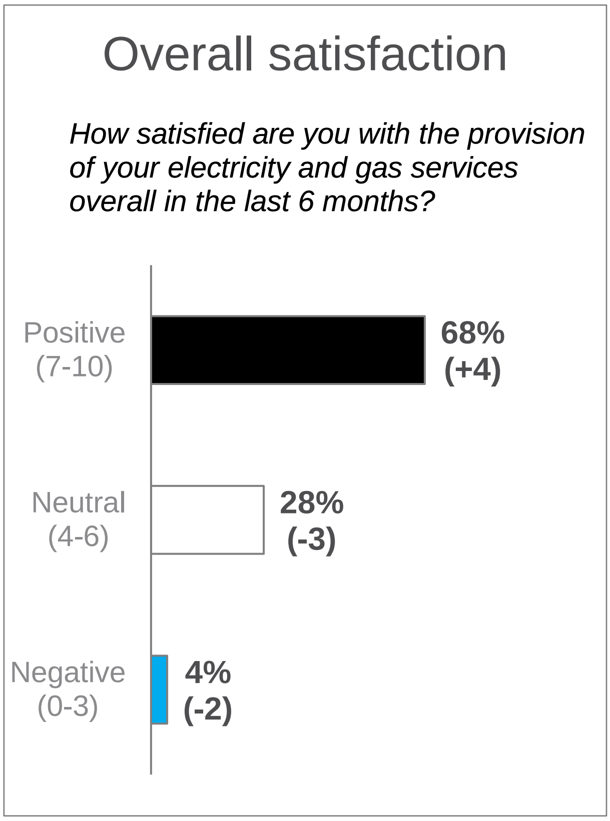
Overall satisfaction

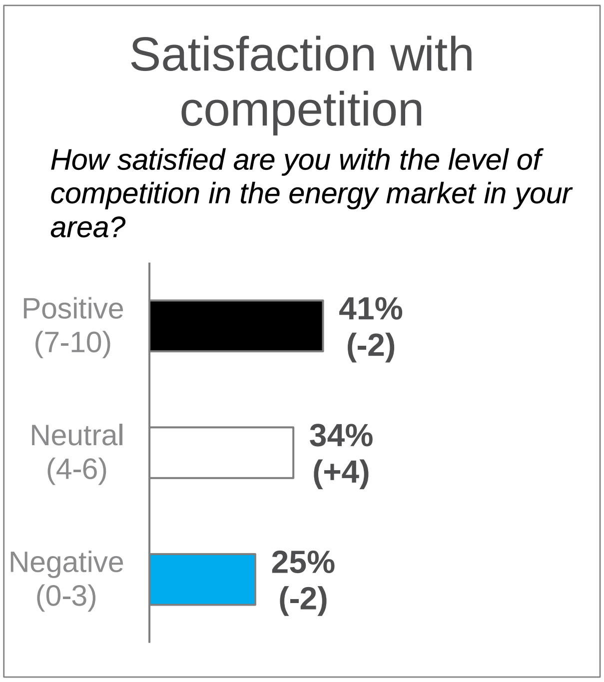
The proportion of Queensland household consumers satisfied with the provision of electricity and gas services overall has increased slightly since April 2017.

- 68% are satisfied, up 4% since last year's survey.

Satisfaction with levels of competition has decreased slightly.

- 41% now say they are satisfied with the level of competition in their area, a decrease of 2%.





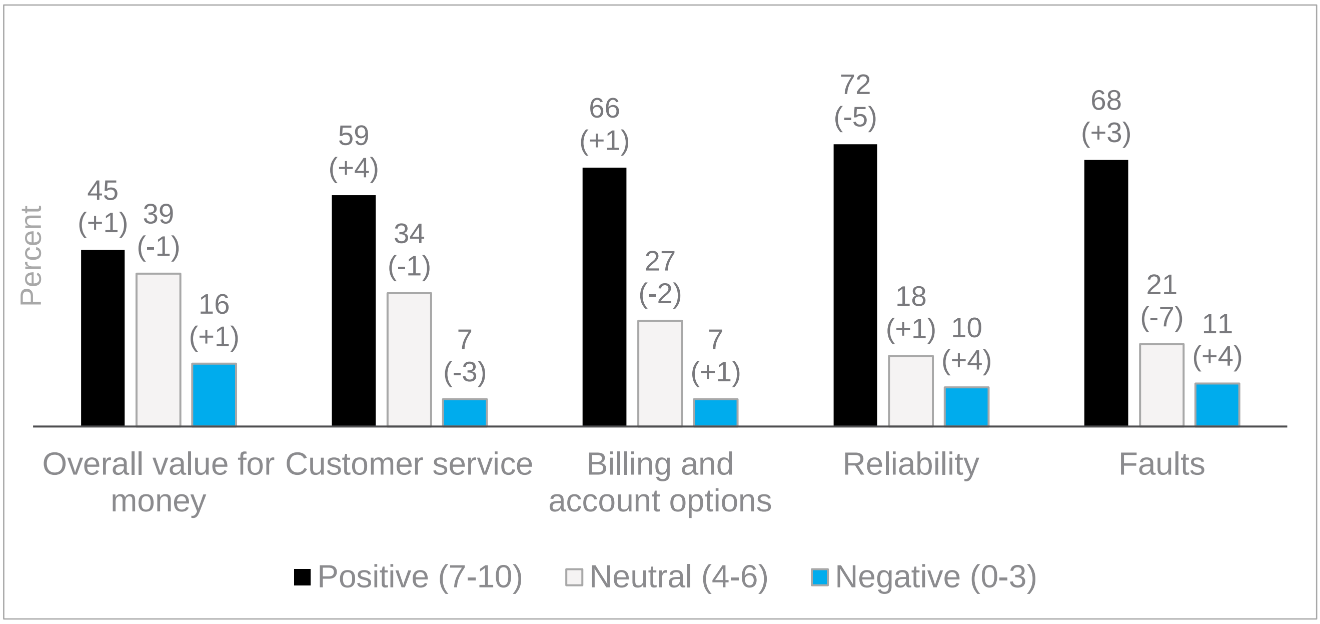
Satisfaction

Satisfaction with electricity

Satisfaction with electricity services has increased somewhat across most measures for Queensland household consumers since April 2017.

- The largest increase was for customer service (up 4% to 59%).
- The only decrease in satisfaction levels was for reliability (down 5% to 72%).

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



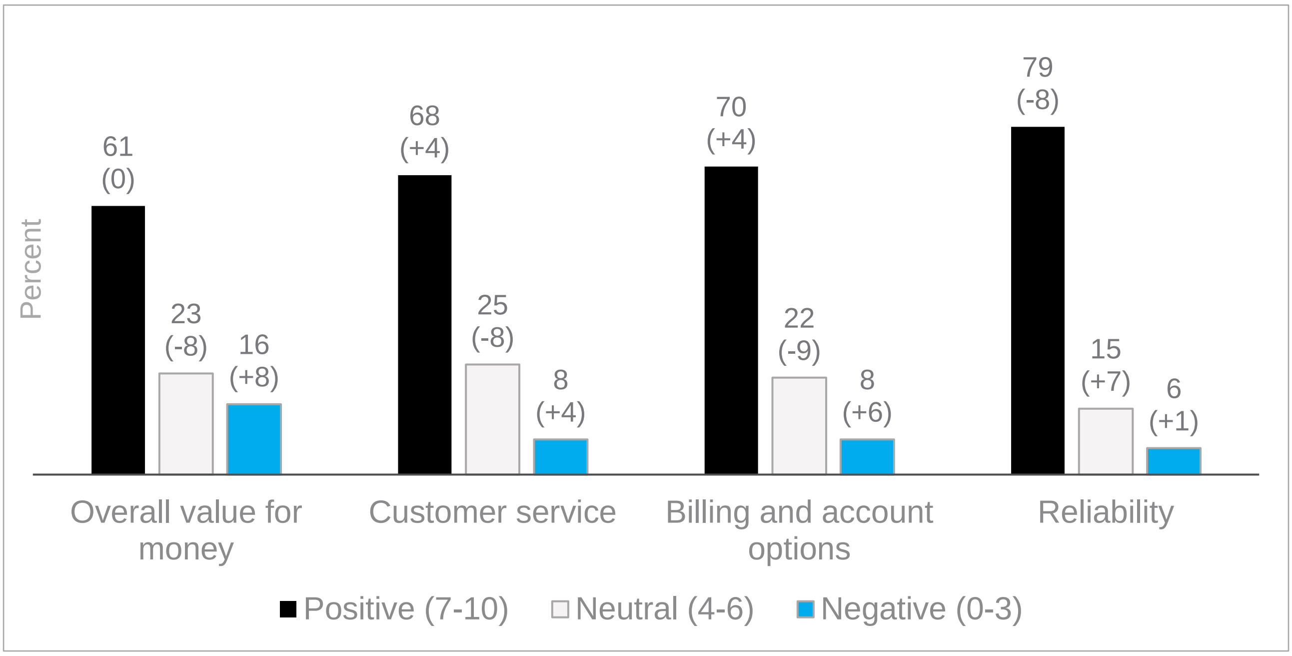
Satisfaction

Satisfaction with gas

Satisfaction with customer service and billing and account options have increased for gas, while reliability is down.

- 68% now say that they are satisfied with the customer service of their gas supplier (up 4%), and 70% are satisfied with their billing and account options (up 4%).
- 79% say that they are satisfied with the reliability of their gas service, down 8%.

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



Base: Queensland consumers with gas (n=105)

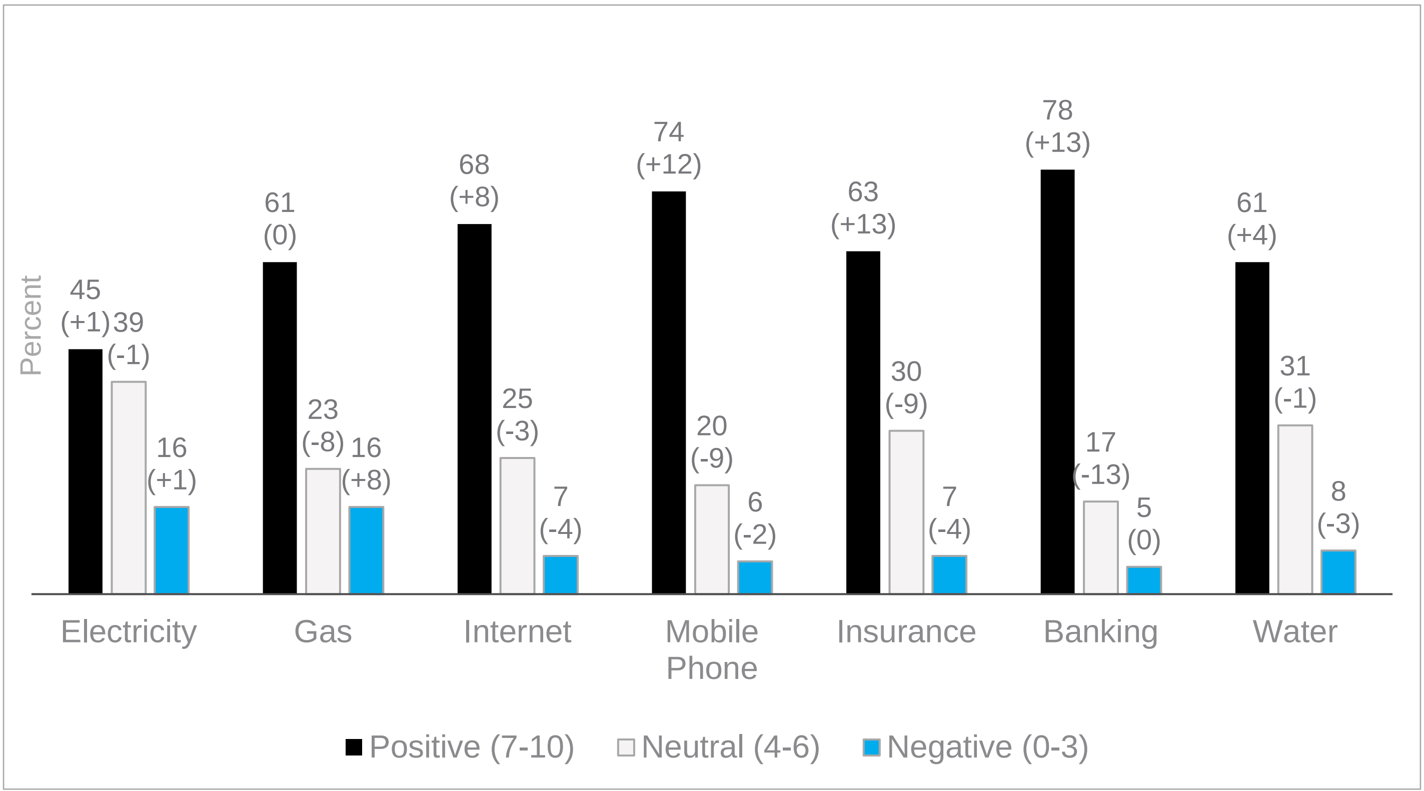
Satisfaction

Satisfaction with utilities and services

Satisfaction with value for money among Queensland household consumers is up or unchanged for all services in the survey.

- The largest increases were for insurance (up 13% to 63%), banking (up 13% to 78%) and mobile phone (up 12% to 74%).
- With 45% of Queensland household consumers satisfied with the value for money they receive for electricity services, this is 16% lower than gas, the utility with the next lowest level of satisfaction.

"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'



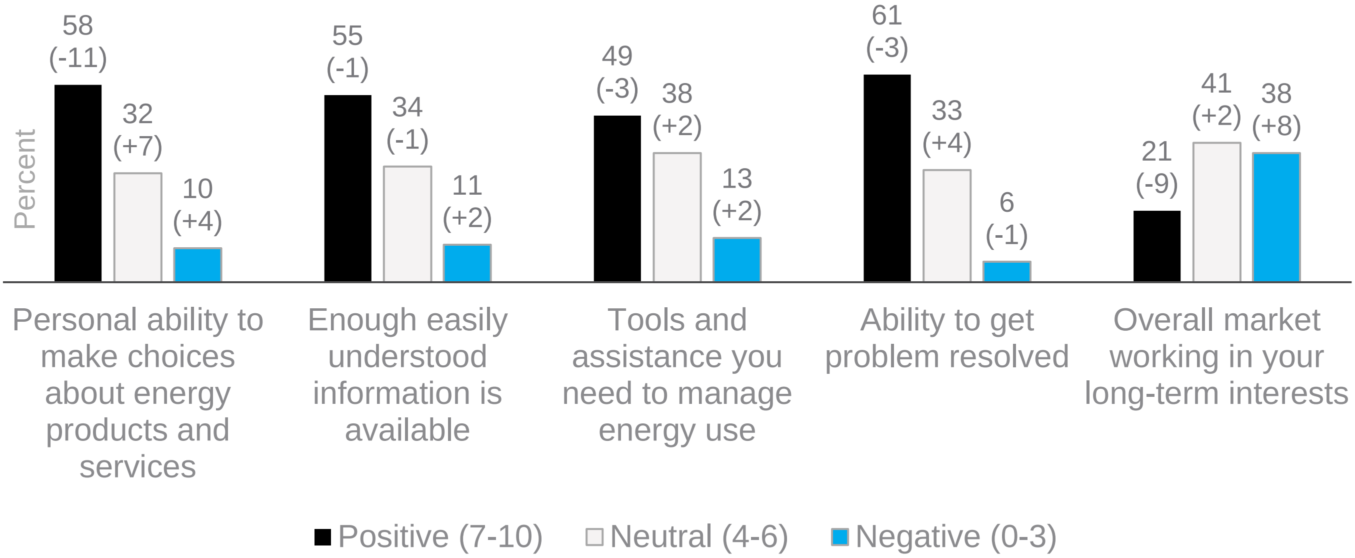
Confidence

Confidence in information and tools

Confidence has declined across all measures for Queensland household consumers in this area.

- The largest decreases were for personal ability to make choice about energy products and services (down 11% to 58%) and the overall market working in your long-term interests (down 9% to 21%).

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

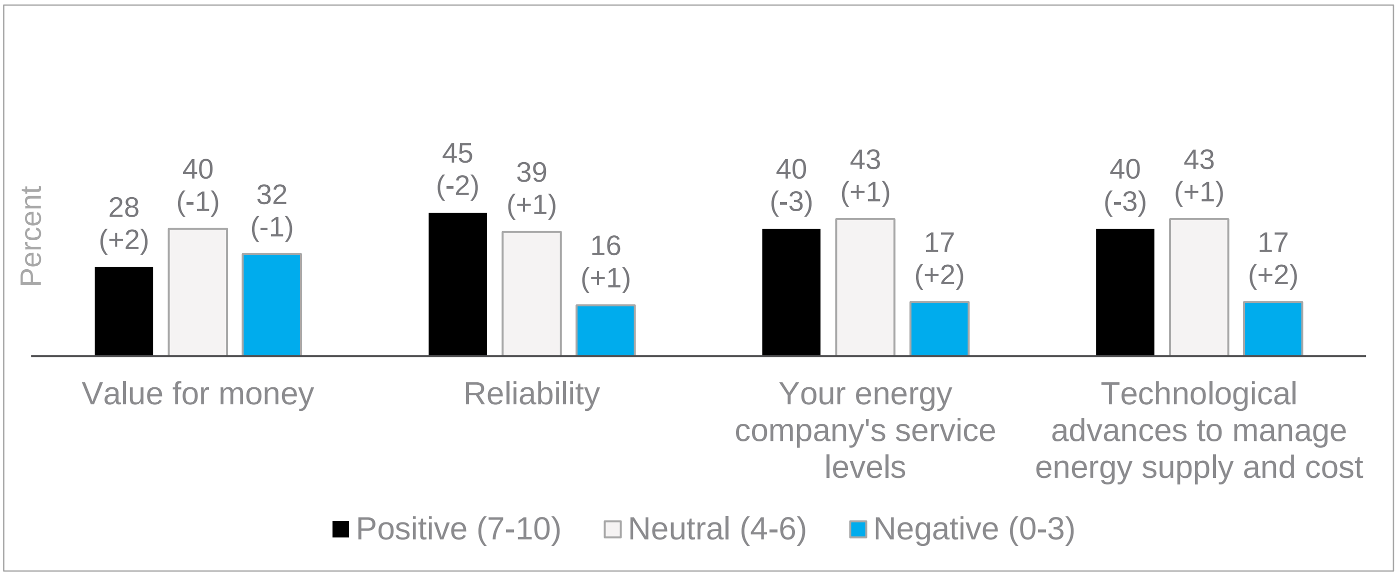


Confidence in long term outcomes

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

- The proportion of Queensland household consumers saying they are confident of better value for money outcomes is up 2% to 28%.
- However, confidence in reliability is down 2% to 45%, confidence in service levels is down 3% to 40%, and confidence in technological advances is down 3% to 40%.

"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'

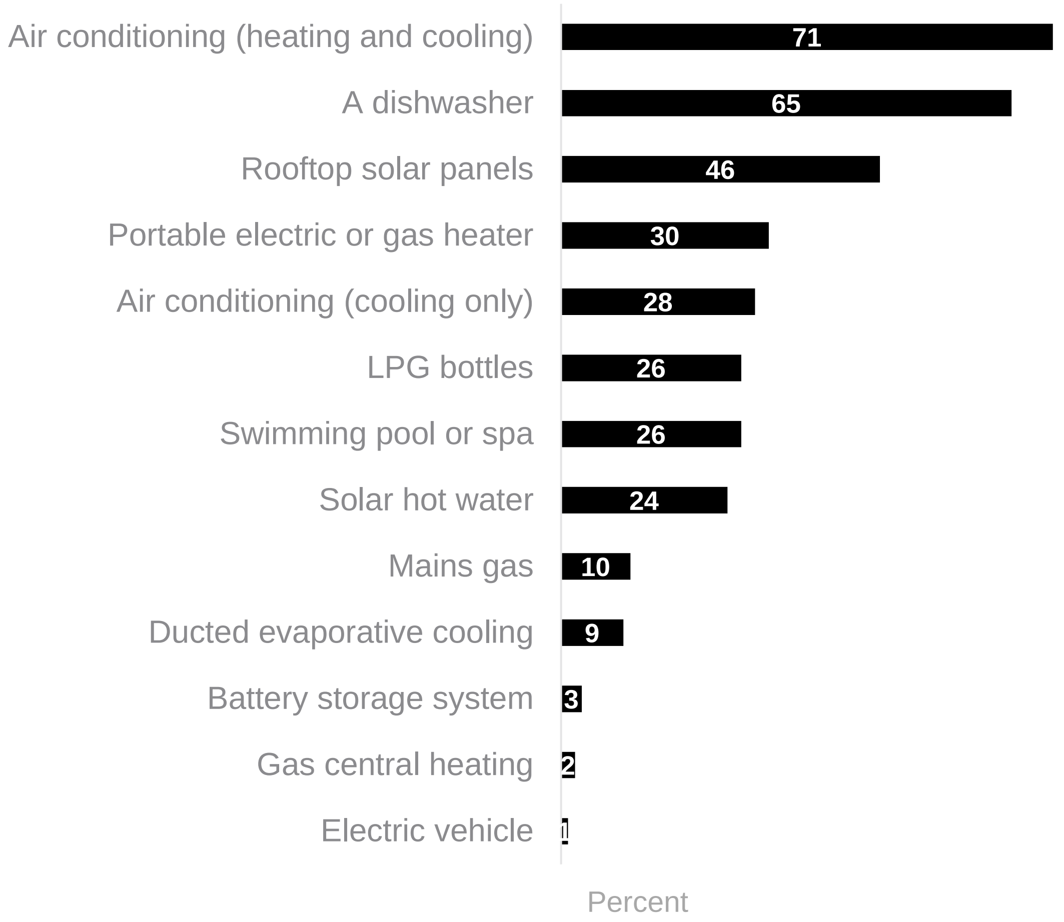


Use of technologies

Most Queensland household consumers use air conditioning for both cooling and heating.

- 71% say that their household has an air conditioner for both heating and cooling, but only 2% have gas central heating.
- 65% say that their household has a dishwasher.

Which of the following do you have at your home?



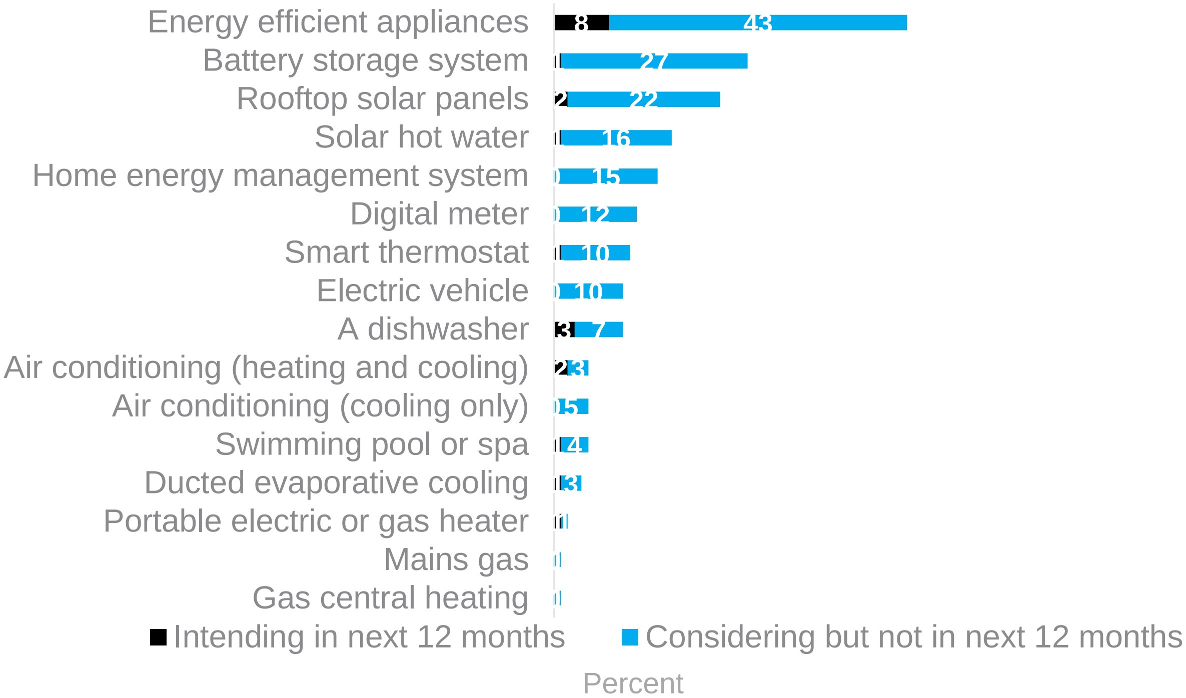
Activity

Uptake of technologies

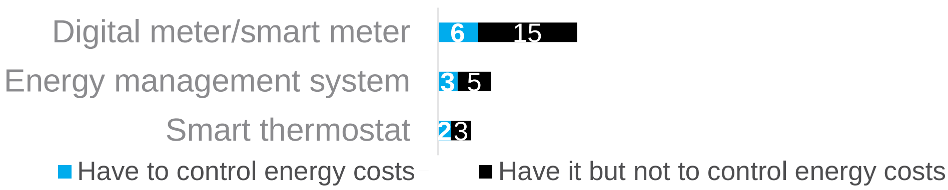
Queensland household consumers show solid interest in purchasing more energy efficient appliances.

- 51% say that they are considering purchasing energy efficient appliances, but only 8% plan to do so in the next 12 months.
- 28% say they are considering a battery storage system, but only 1% plan to purchase one in the next 12 months.

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



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



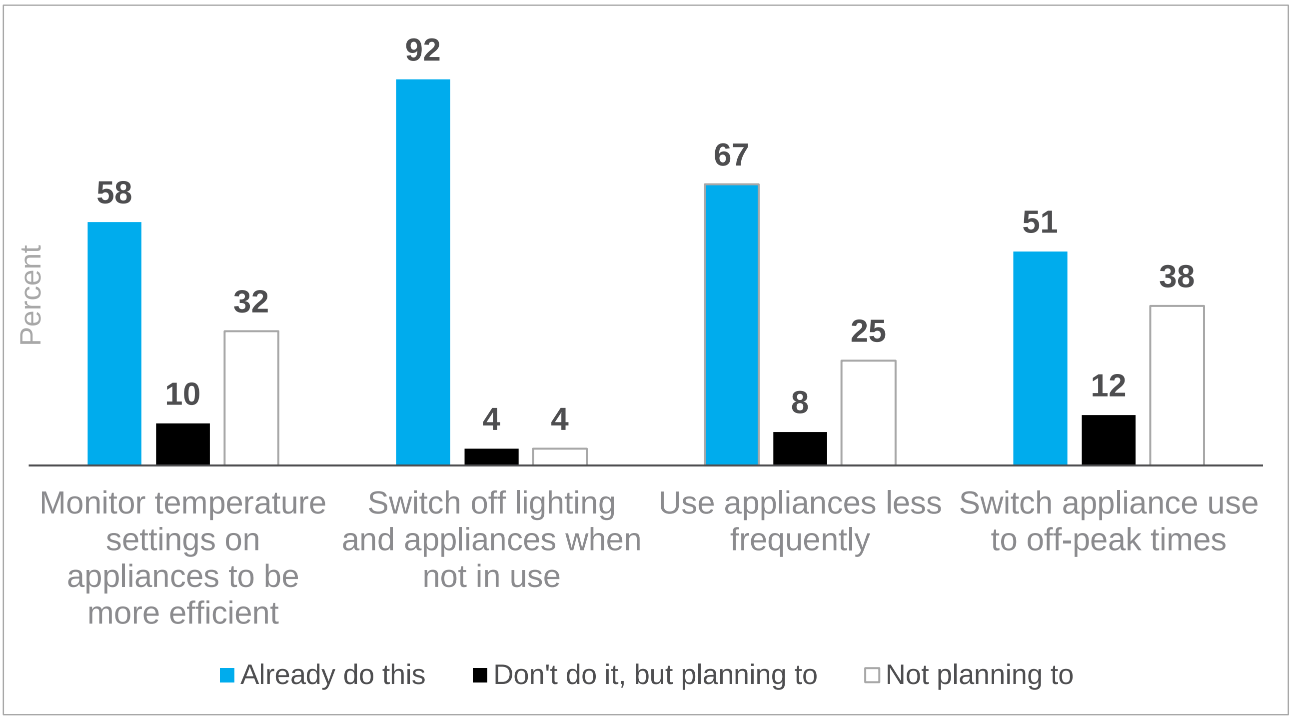
Activity

Energy saving practices

Queensland household consumers are already doing a range of practical things to manage their energy use and costs.

- 92% say that they switch of lighting and appliances when not in use.
- 51% say that they have switch appliance use to off-peak times.

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



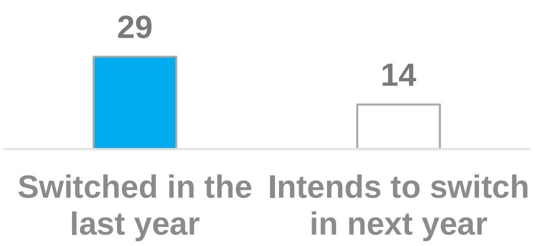
Activity

Reasons for considering switching

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

- 48% of those who switched companies in the last 3 years say that weren't satisfied with the value for money of their old company.
- 29% of all Queensland household consumers say they switched energy companies or plans in the last year, and 14% intend to switch energy companies or plans in the next year.
- The switching numbers are higher in the deregulated part of the state (South East Queensland) where 37% of household consumers reported switching plans or companies in the past year and 17% intend to do so in the next year.

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



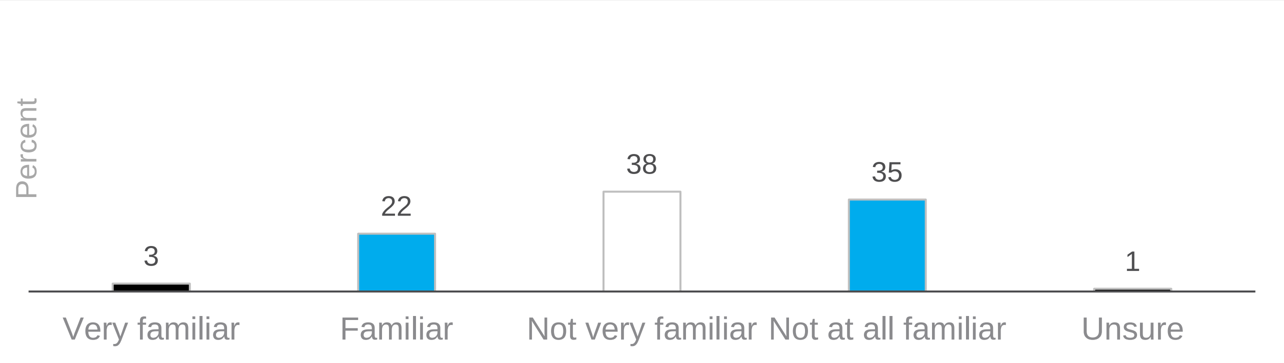
Thinking of the last time you were looking at switching energy companies, which of the following apply to you?

Other

Awareness of the Energy Ombudsman

25% say they are familiar with the Energy Ombudsman.

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



South Australia

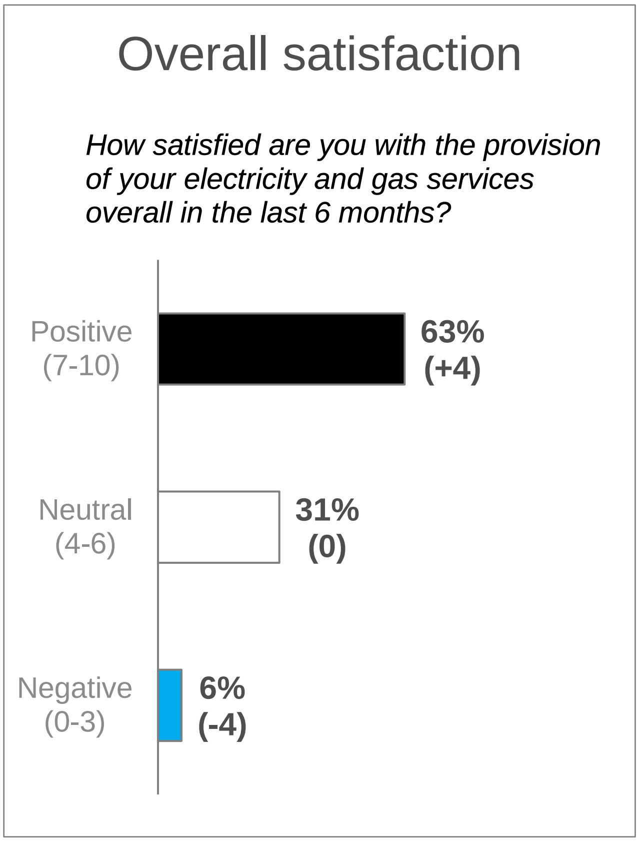
Overall satisfaction

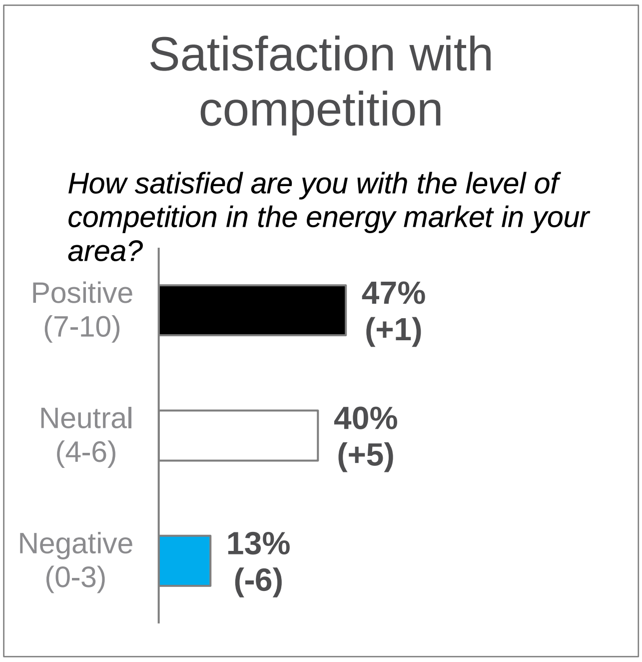
South Australian household consumers in this survey gave slightly higher overall satisfaction ratings than those in the previous survey.

- 63% rate their satisfaction as positive, up 4% since April 2017.

There has been a marginal increase in satisfaction with levels of competition.

- The proportion of those satisfied with the competition in the energy market increased by 1% to 47%.





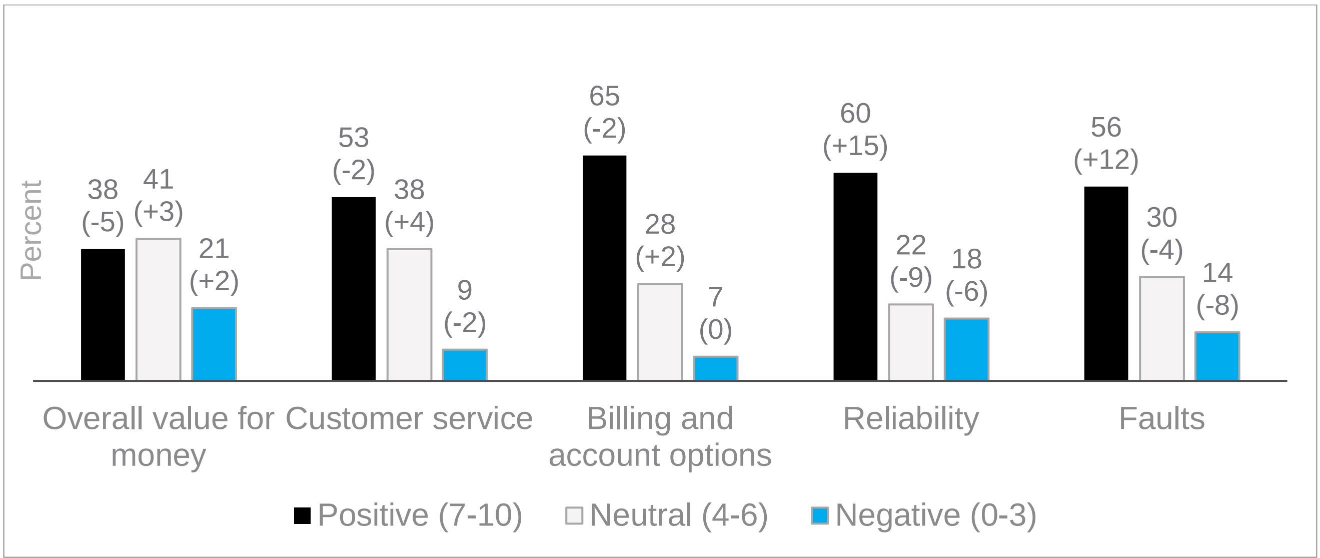
Satisfaction

Satisfaction with electricity

Satisfaction with electricity reliability and fault resolution has increased.

- 60% are now satisfied with the reliability of their electricity services, up 15% since April 2017.
- 56% are now satisfied with the fault resolution of their electricity services, up 12% from April 2017.
- Satisfaction with overall value for money is down 5% to 38%.

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



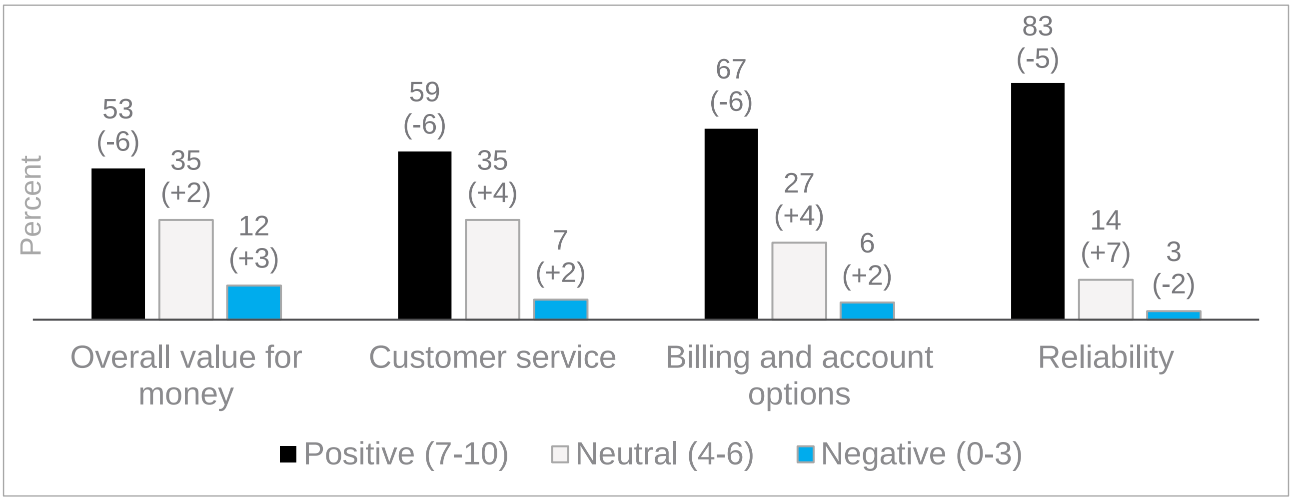
Satisfaction

Satisfaction with gas

Satisfaction with gas services has decreased across all measures.

- 53% of South Australian household consumers who have gas are satisfied with the overall value for money of their gas services, down 6% from April 2017.
- 59% are satisfied with the customer service of their gas services, down 6%.
- 67% are satisfied with their billing and account options, down 6%.

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



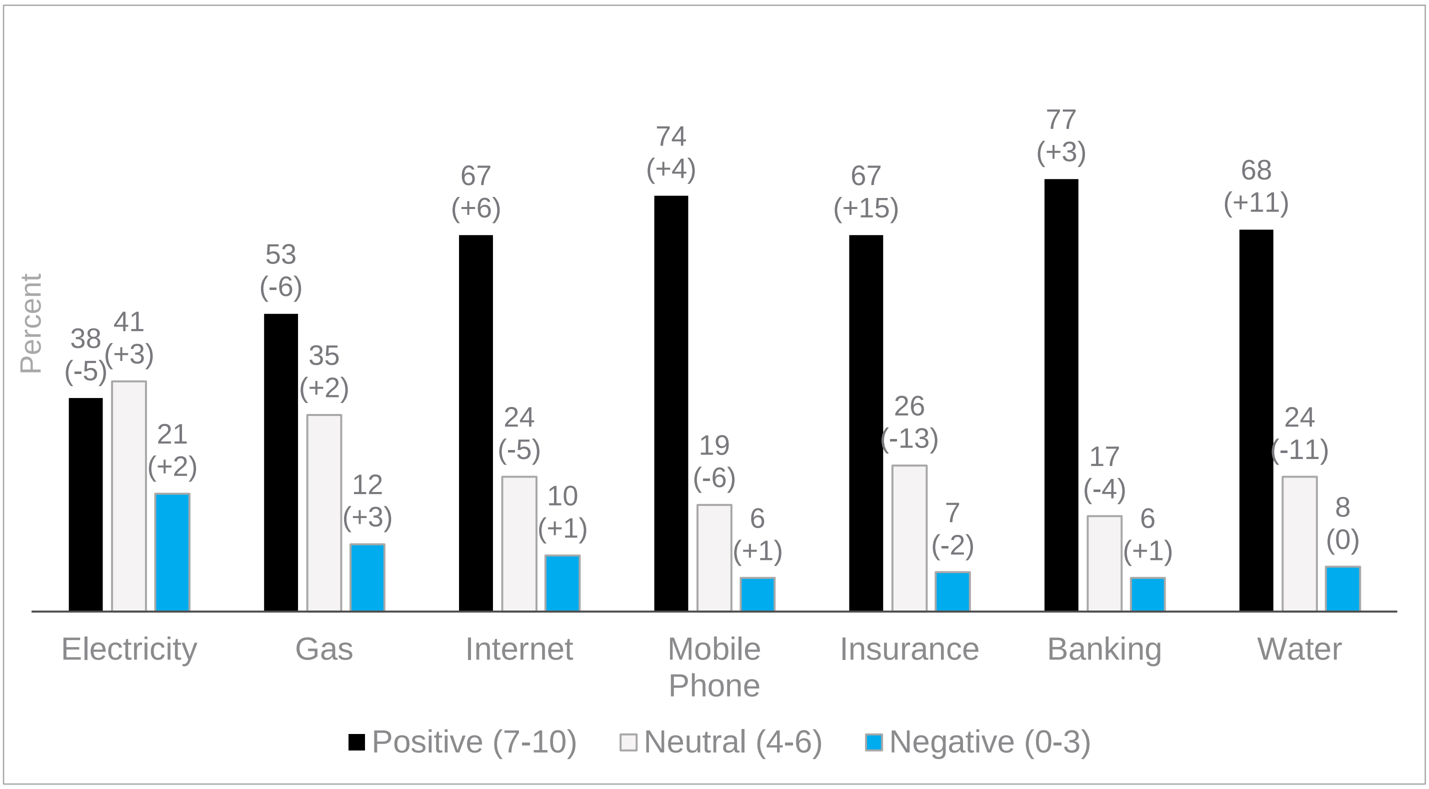
Base: SA consumers with gas (n=227)

Satisfaction with utilities and services

Electricity and gas trail other utilities and services in terms of satisfaction.

- Other than electricity and gas, all other utilises have increased in terms of satisfaction with value for money.
- The largest increases are for insurance (up 15% to 67%) and water (up 11% to 68%).
- Satisfaction with value for money in electricity is down 5% to 38% and with gas is down 6% to 53%.

"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'



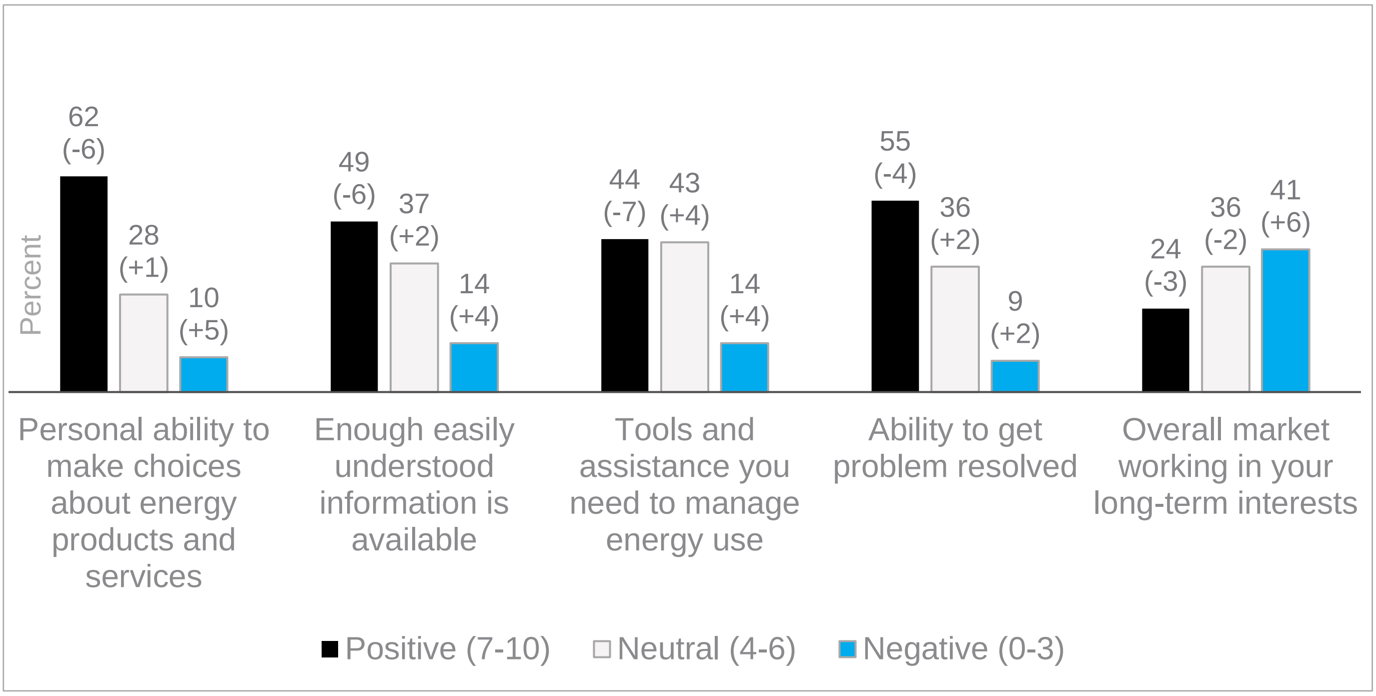
Confidence

Confidence in information and tools

Confidence in the market and in the information and tools available to support energy consumers is down across all measures compared with April 2017.

- 24% of energy consumers are confident that the overall market is working in their interests (down 3%)
- The largest decreases are in confidence that the right tools and assistance needed to manage energy use are available (down 7% to 44%), personal ability to make choices about energy products (down 6% to 62%), and the availability of easily-understood information (down 6% to 49%).

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

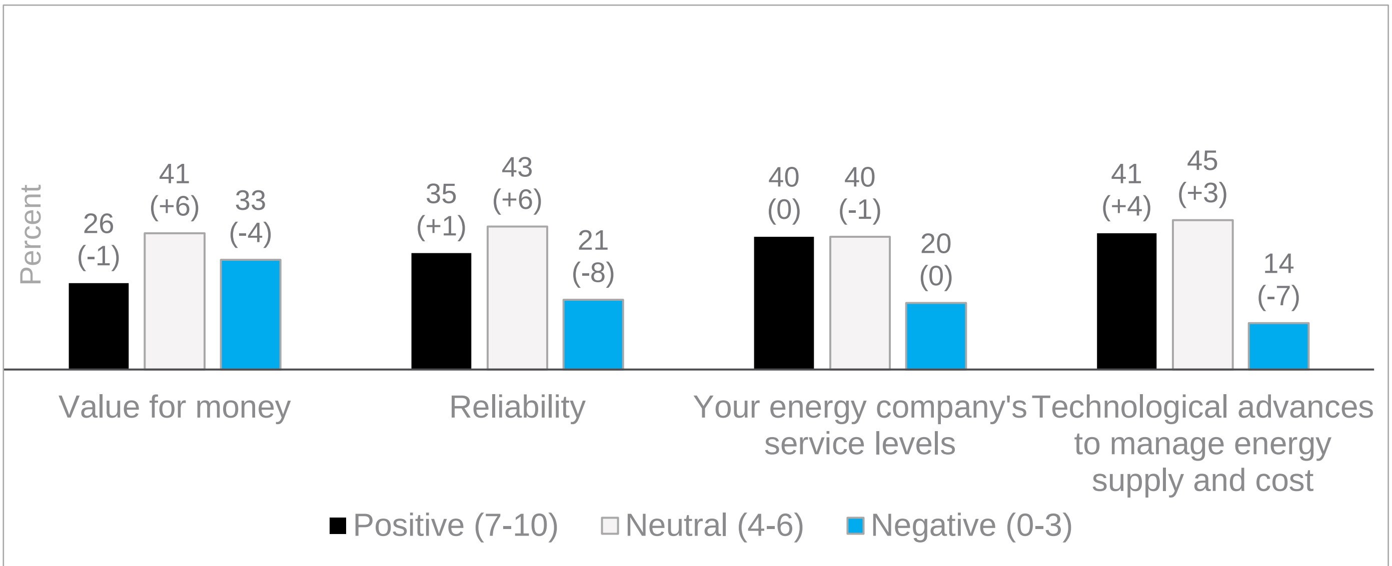


Confidence in long term outcomes

Confidence in long term outcomes for technological advances has increased slightly.

- Confidence in long term technological advances to manage energy supply and costs is up 4% to 41% since April 2017.

"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'



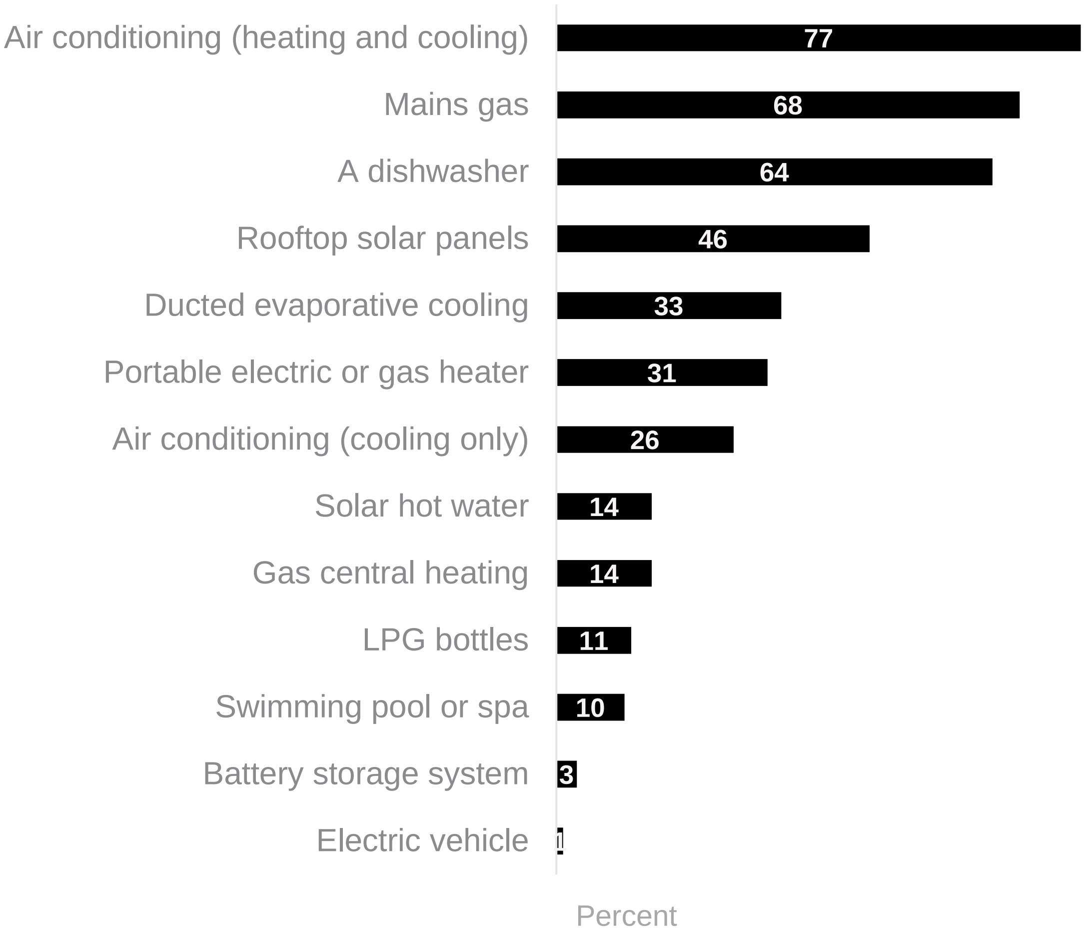
Confidence

Use of technologies

Heating and cooling are in wide use across the homes of SA consumers.

- 77% say that they have air conditioning for both heating and cooling.
- 31% say they have a portable electric or gas heater.
- 68% say they have mains gas, though only 14% have gas central heating.

Which of the following do you have at your home?



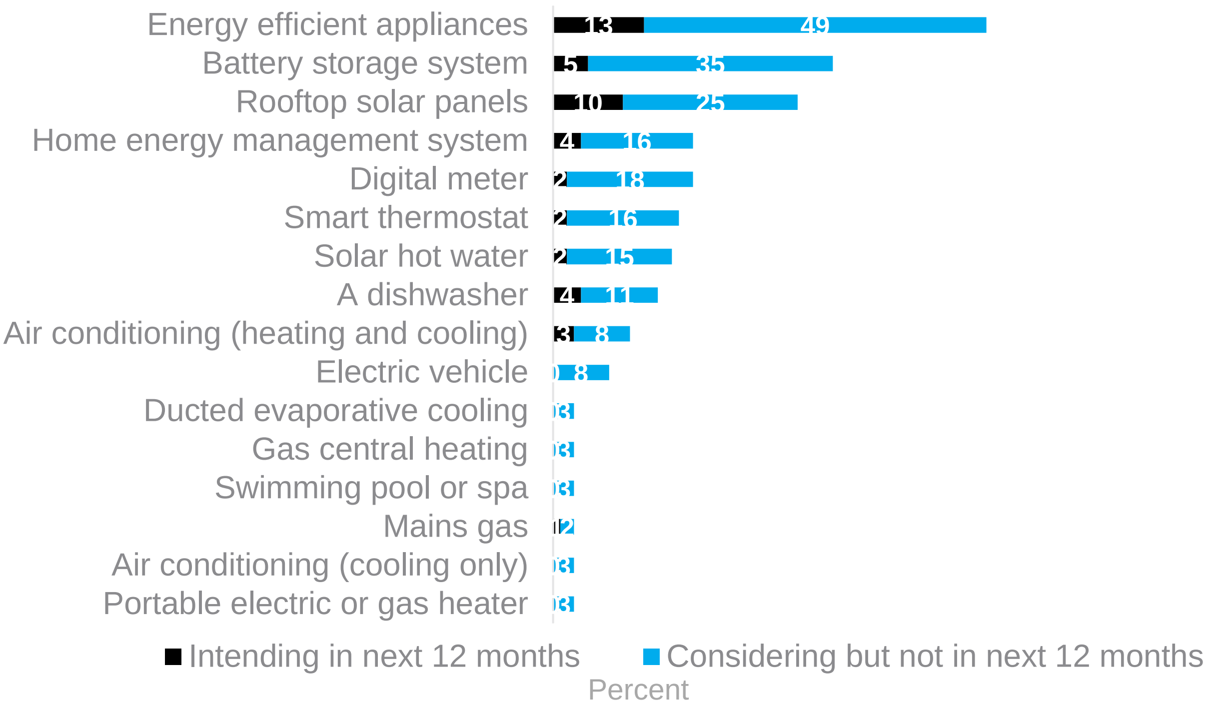
Activity

Uptake of technologies

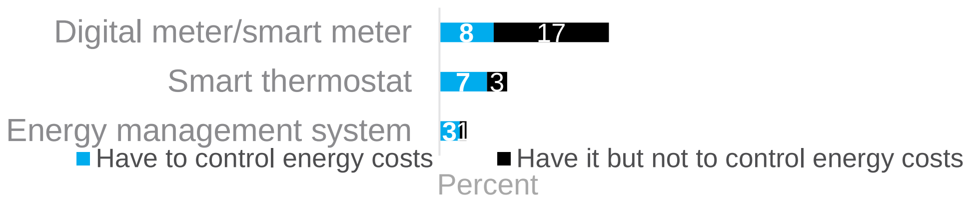
SA household consumers show solid interest in purchasing more energy efficient appliances.

- 62% say that they are considering energy efficient appliances, but only 13% plan to purchase them in the next 12 months.
- 40% claim to be considering a battery storage system, but only 5% plan to purchase one in the next 12 months.

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



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



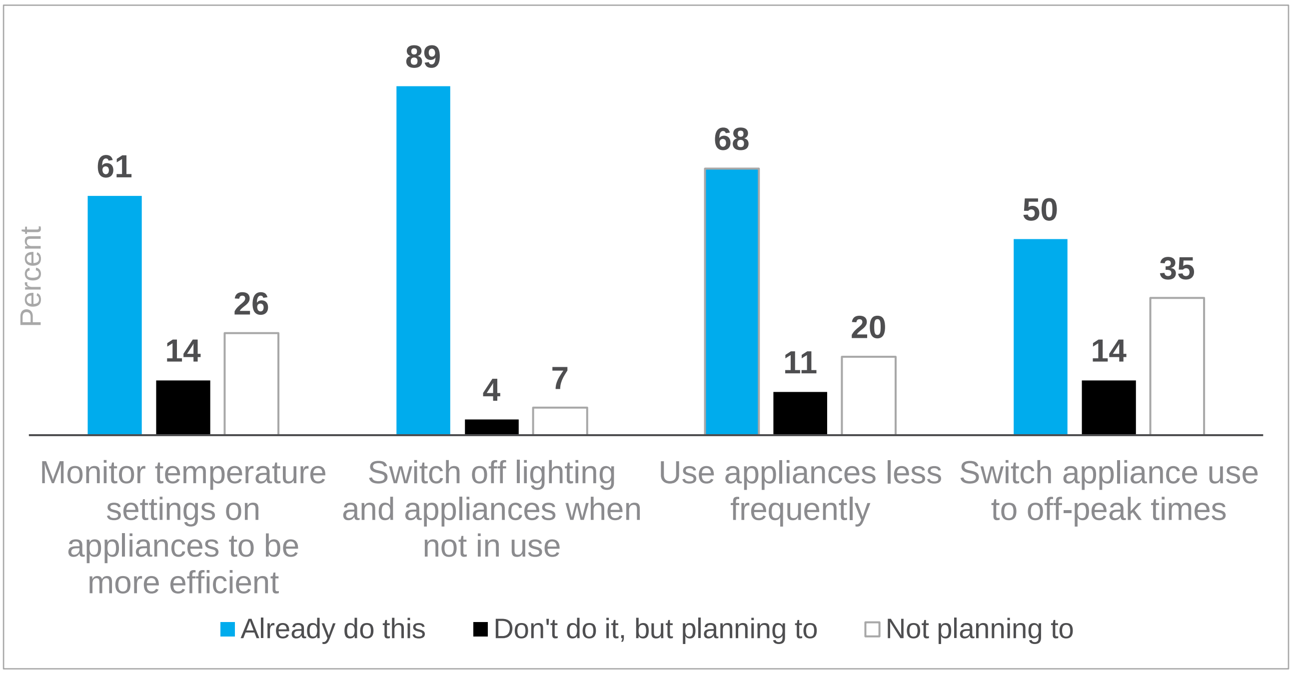
Activity

Energy saving practices

SA household consumers are already active in managing their energy use.

- 89% say that they already switch off lighting and appliances when not in use, and 68% use appliances less frequently.
- 50% have already switched appliance use to off-peak times.

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



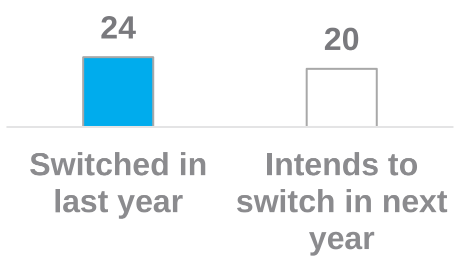
Activity

Reasons for considering switching

The most driver to consider switching energy companies for SA consumers was low satisfied with the value for money of their electricity service

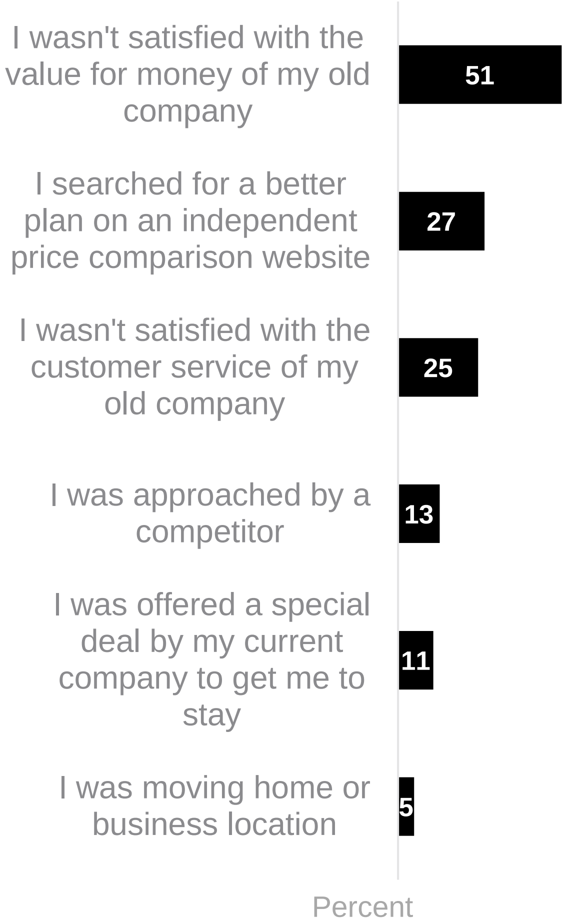
- 51% of those who switched companies in the last 3 years said that they weren't satisfied with the value for money of their old company.
- 24% of SA household consumers switched energy companies or plans in the past year.
- 20% plan to switch the energy companies or plans next year.

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



Base: All consumers (n=303)

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



Base: Consumers who switched retailers in the last 3 years (n=55)

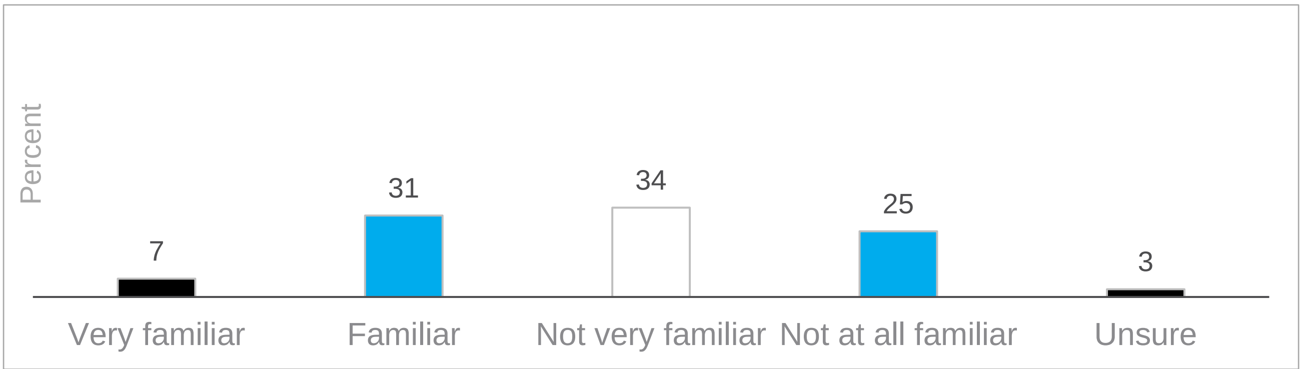
Note small sample size

Other

Awareness of the Energy Ombudsman

38% say they are familiar with the Energy Ombudsman.

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



Tasmania

Satisfaction

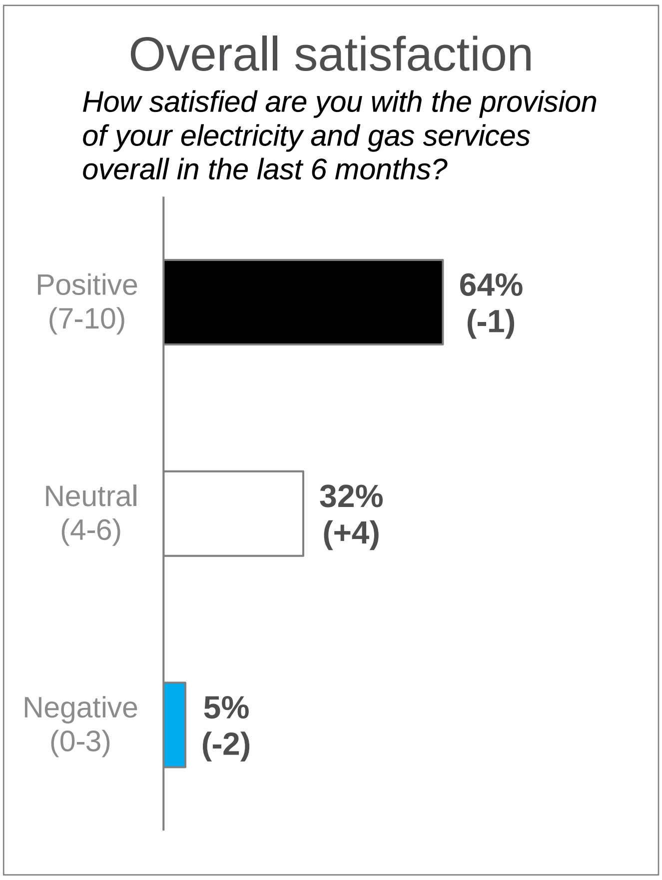
Overall satisfaction

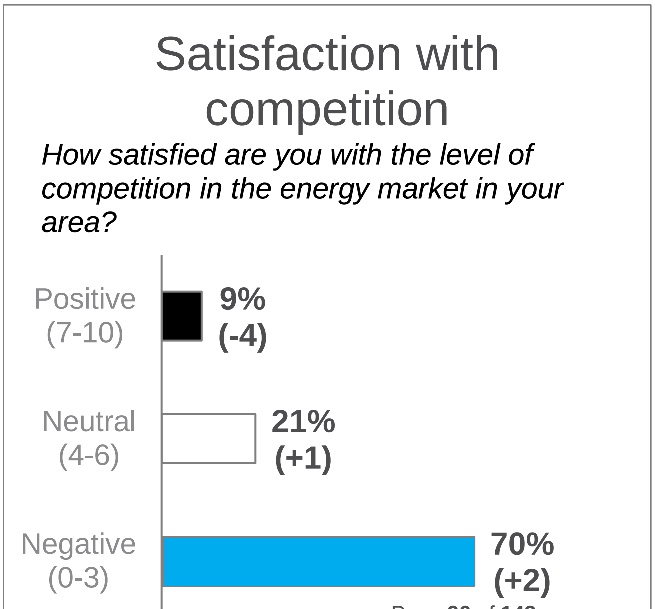
There is little change in overall satisfaction with electricity and gas services amongst Tasmanian household consumers.

- 64% now say they are satisfied, down 1% since April 2017.

Satisfaction with levels of competition in Tasmania remain low.

- 9% say they are satisfied, down 4% from April 2017.





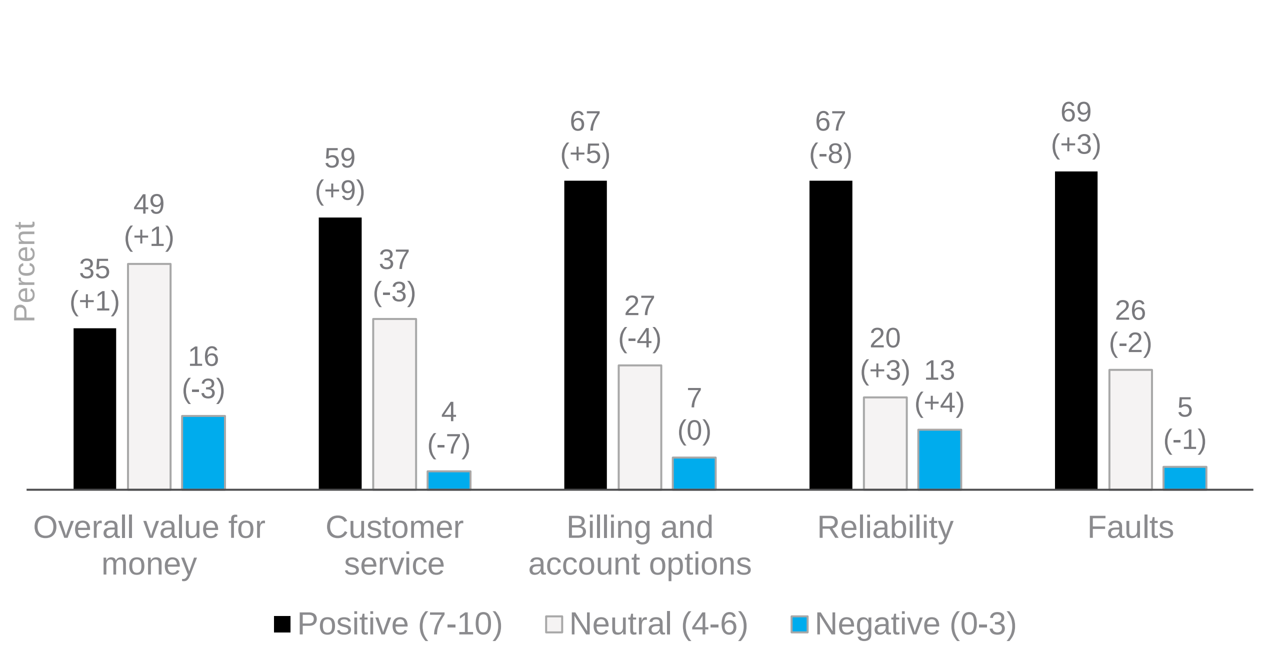
Satisfaction

Satisfaction with electricity

Satisfaction with most measures of electricity satisfaction has risen in Tasmania.

- 59% of Tasmanian household consumers now say they are satisfied with customer service (up 9%), and 67% are satisfied with their billing and account options (up 5%).
- However, there has been a decrease in satisfaction with reliability, with 67% now satisfied (down 8%).

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



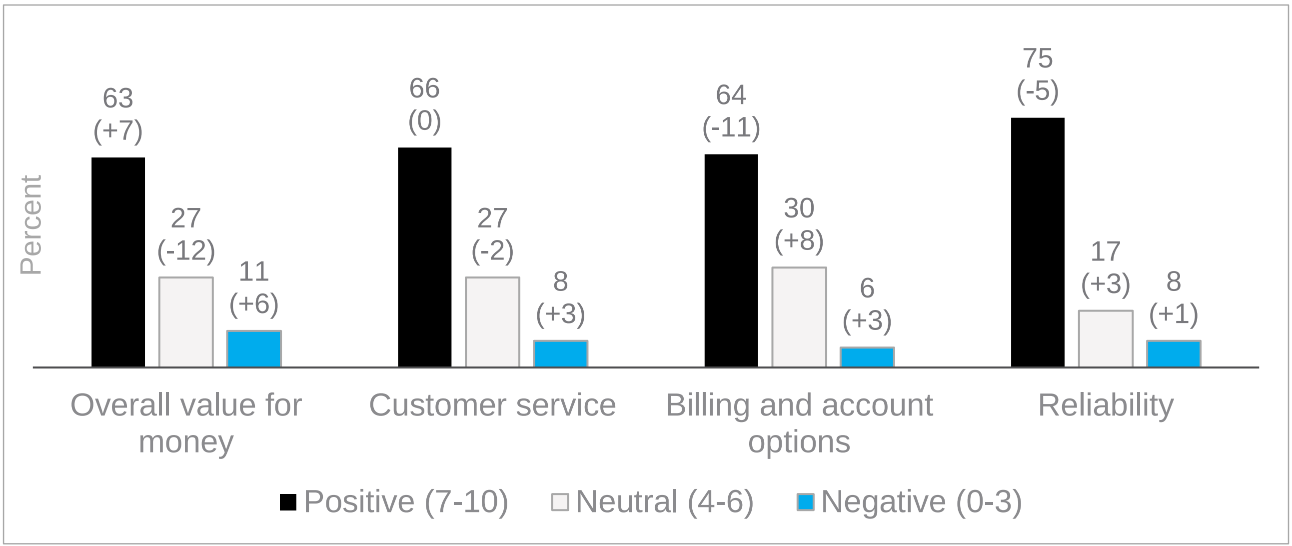
Satisfaction

Satisfaction with gas

Tasmanian household gas consumers are more satisfied with overall value for money, but less satisfied with reliability and billing and account options.

- 63% are now satisfied with their overall value for money, up 7% from April 2017.
- 64% are now satisfied with their billing and account option (down 11%), and 75% are satisfied with the reliability of their gas connection (down 5%).

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



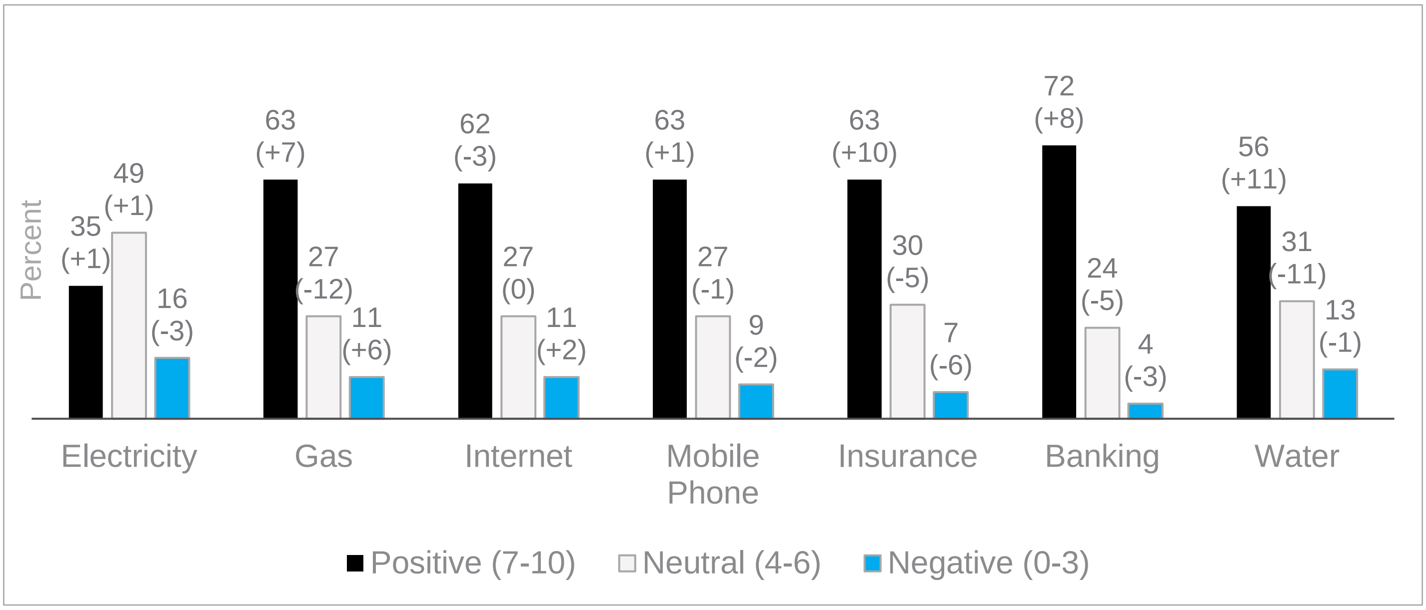
Base: Tasmanian consumers with gas (n=64)
Note: small sample size

Satisfaction with utilities and services

Satisfaction with value for money of electricity and gas have gone up, but electricity still trails other utilities and services.

- 35% of Tasmanian household consumers now rate the value for money of electricity services positively, up 1% from April. 2017. Satisfaction with electricity is 21% lower than that of water, the utility with the second lowest level of satisfaction.
- 63% are satisfied with the value for money of their gas service (up 7%), making it similar to most utilities and services in the survey on this measure.

"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'

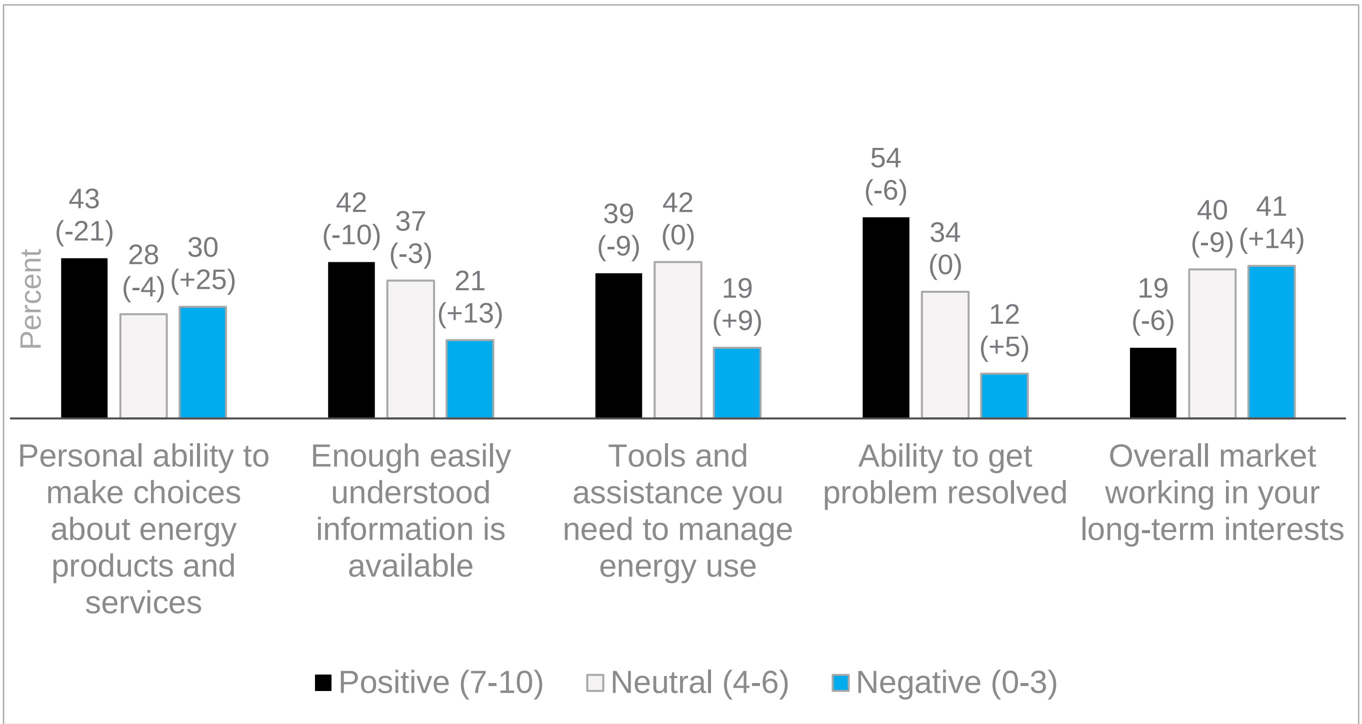


Confidence in information and tools

Confidence in the market and the information and tools to manage energy use and costs has dropped across all measures.

- Confidence that the energy market is working in the long-term interests of consumers has fallen 6% to 19%.
- 43% are confident in their personal ability to make choices about energy products and services, down 21% from April 2017.
- There were smaller decreases for confidence in the availability of information (down 10% to 42%) and the tools and assistance needed to manage energy use (down 9% to 39%).

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

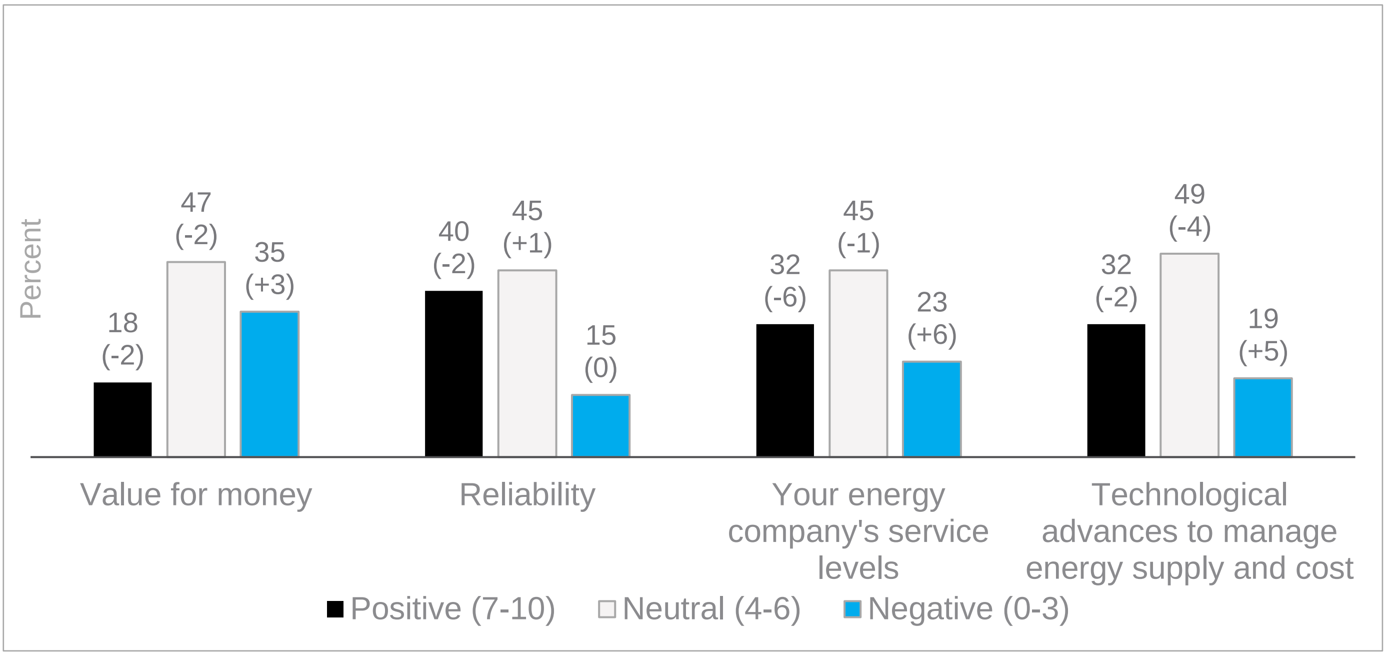


Confidence in long term outcomes

Confident in future outcomes has declined at least slightly across each of the below measures.

- The largest decrease was for confidence in long-term outcomes for your energy company's service levels (down 6% to 32%).
- Confidence that value for money for energy services will improve in the future is down 2% to 18%.

"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'



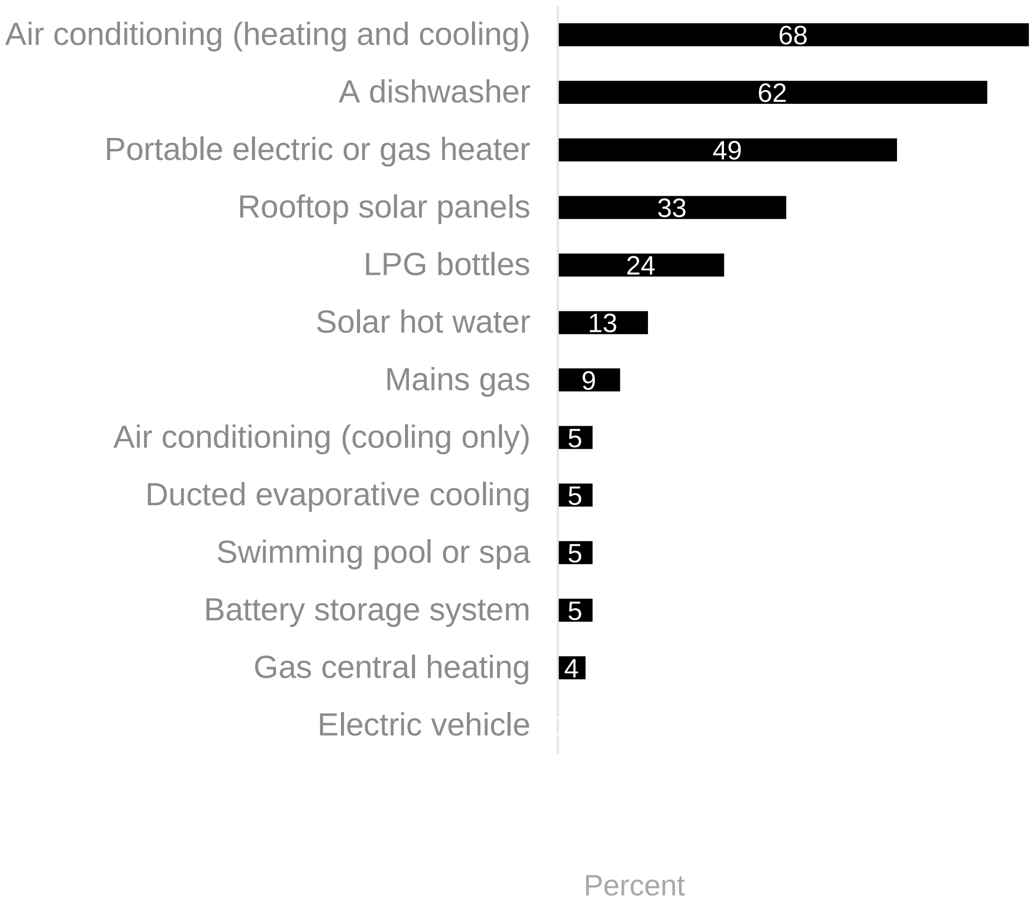
Confidence

Use of technologies

Tasmanian household consumers favourite air conditioning units and portable heaters over gas central heating and ducted evaporative cooling

- 68% say that they have an air conditioner for both heating and cooling, and 49% say they have a portable heater.
- Only 4% say they have gas central heating, and 5% have ducted evaporative cooling.

Which of the following do you have at your home?



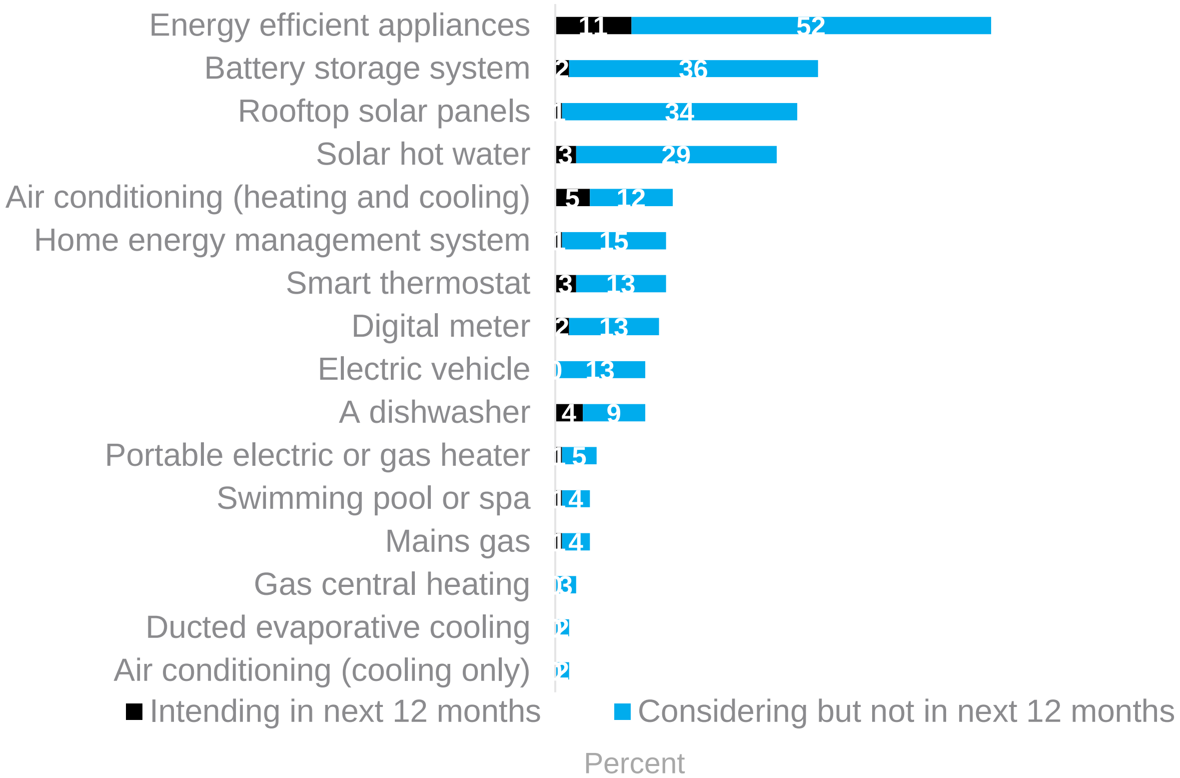
Activity

Uptake of technologies

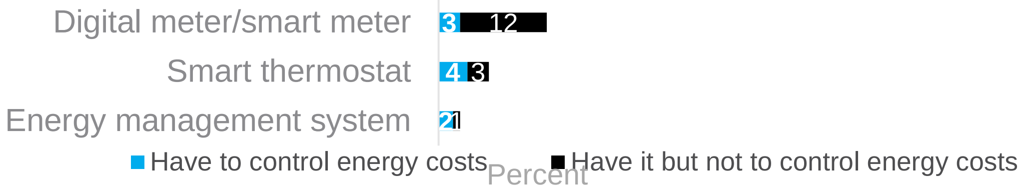
Tasmanian household consumers show interest in purchasing more energy efficient appliances, but not immediately.

- 63% say that they are considering purchasing energy efficient appliances, but only 11% plan to purchase them in the next 12 months.
- 38% say they are considering a battery storage system, but only 2% plan to purchase them in the next 12 months.

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



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



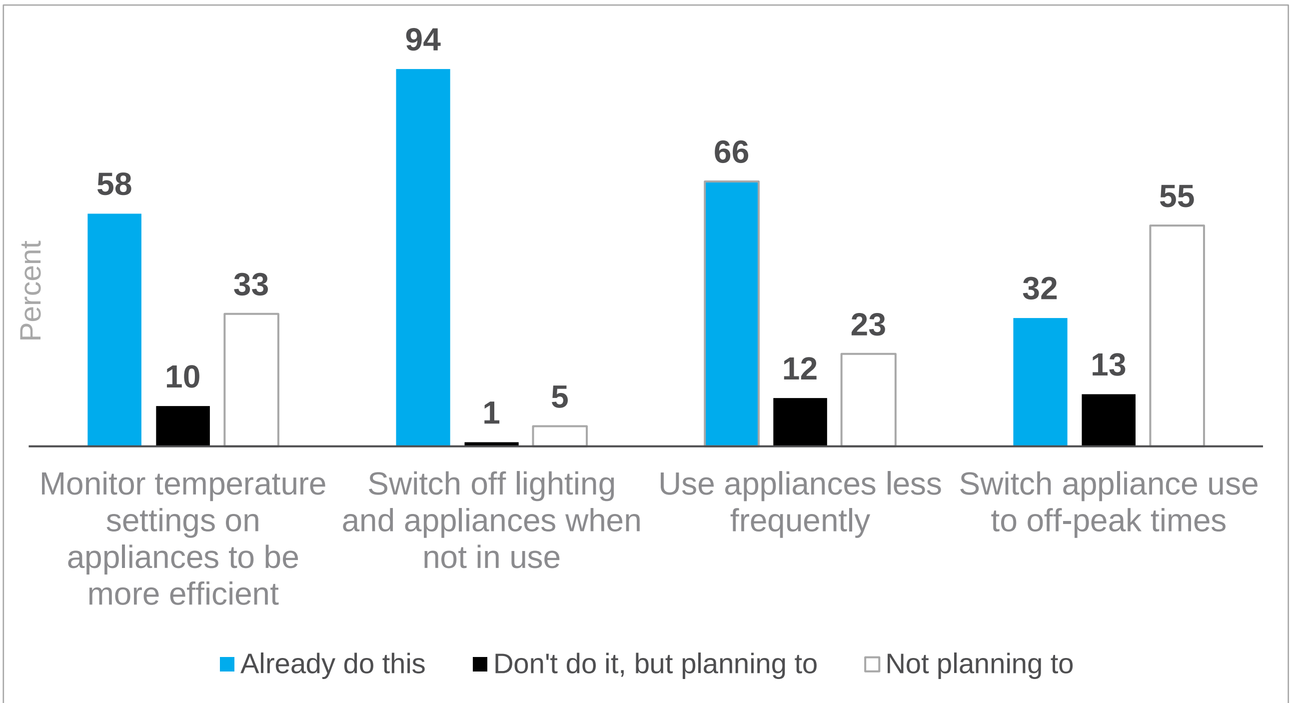
Activity

Energy saving practices

Tasmanian household consumers are already taking action to lower their energy use.

- 94% say that they already switch lighting and appliances off when not in use.
- 32% say that they have already switched appliance use to off-peak times.

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

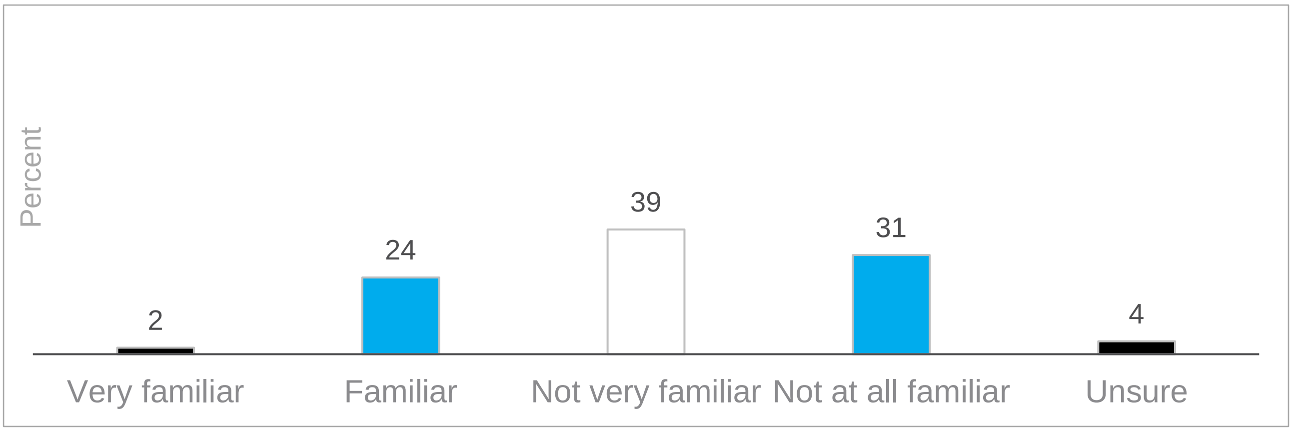


Other

Awareness of the Energy Ombudsman

26% said they were familiar with the Energy Ombudsman.

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



Australian Capital Territory

Satisfaction

Overall satisfaction

Satisfaction with electricity and gas services amongst household consumers in the ACT has decreased.

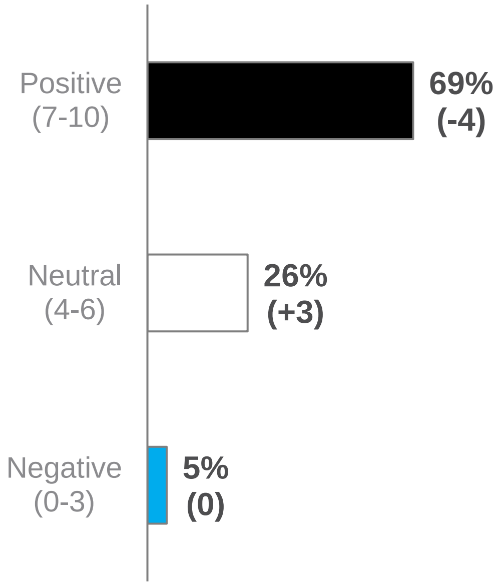
- 69% say they are satisfied, down 4% from April 2017.

Satisfaction with the levels of competition has also decreased significantly.

- 20% of ACT household consumers now say they are satisfied, down 17% since April 2017.

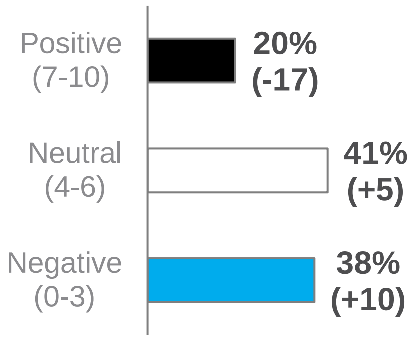
Overall satisfaction

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



Satisfaction with competition

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



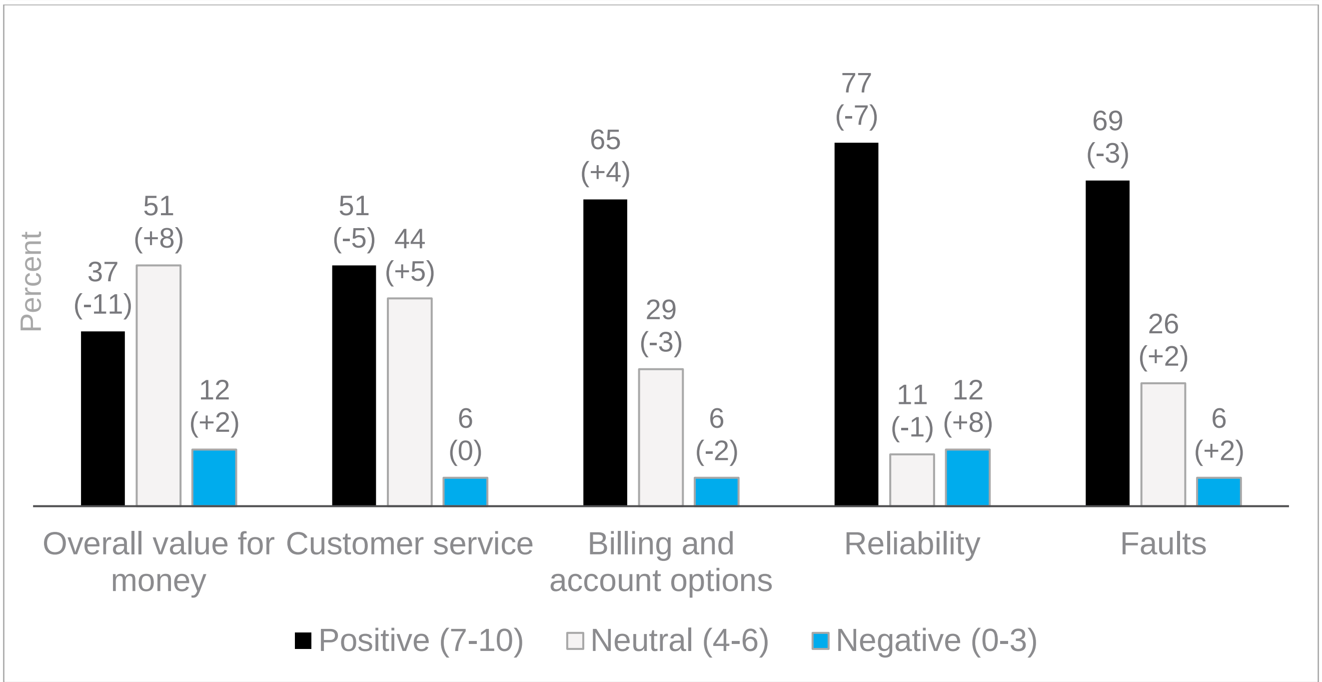
Satisfaction

Satisfaction with electricity

Satisfaction has decreased for all measures except billing and account options.

- 37% now rate overall value for money positively, down 11% since April 2017, and 51% rate customer service positively, down 5%.
- There was a small increase for billing and account options, with 65% now rating it positively (up 4%).

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

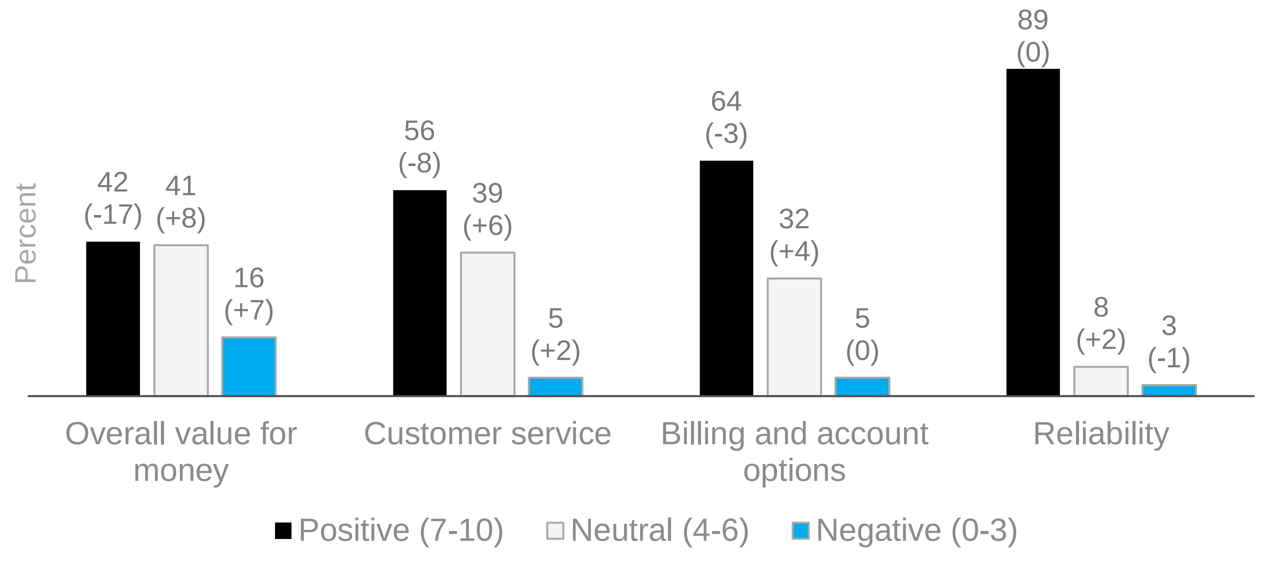


Satisfaction with gas

Ratings for gas are down across most measures.

- The largest change was to satisfaction with overall value for money (down 17% to 42%).
- There was also an 8% decrease in satisfaction with customer service (to 56%).

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



Base: ACT consumers with gas (n=152)

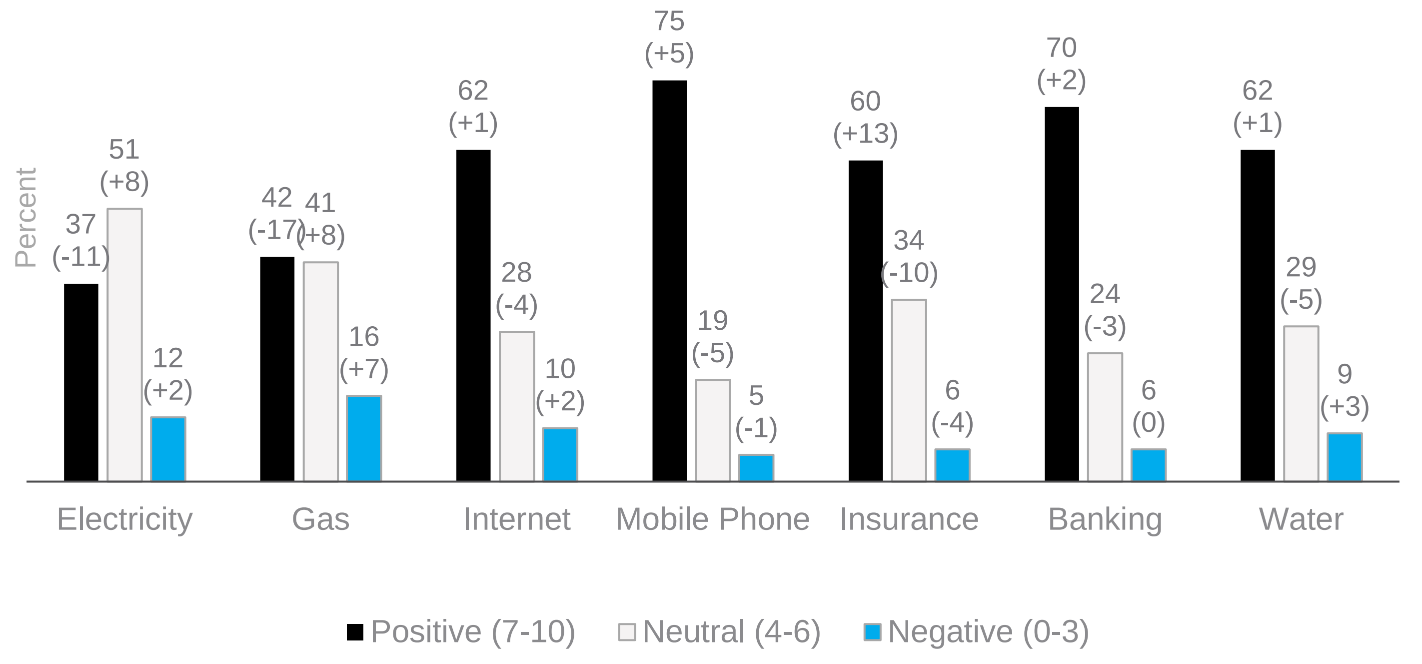
Satisfaction

Satisfaction with utilities and services

Gas and electricity continue to trail other utilities and services in terms of value for money.

- Electricity (37% satisfied) and gas (42% satisfied) trail other utilities and services in the survey, each of which have at least 60% satisfaction.

"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'



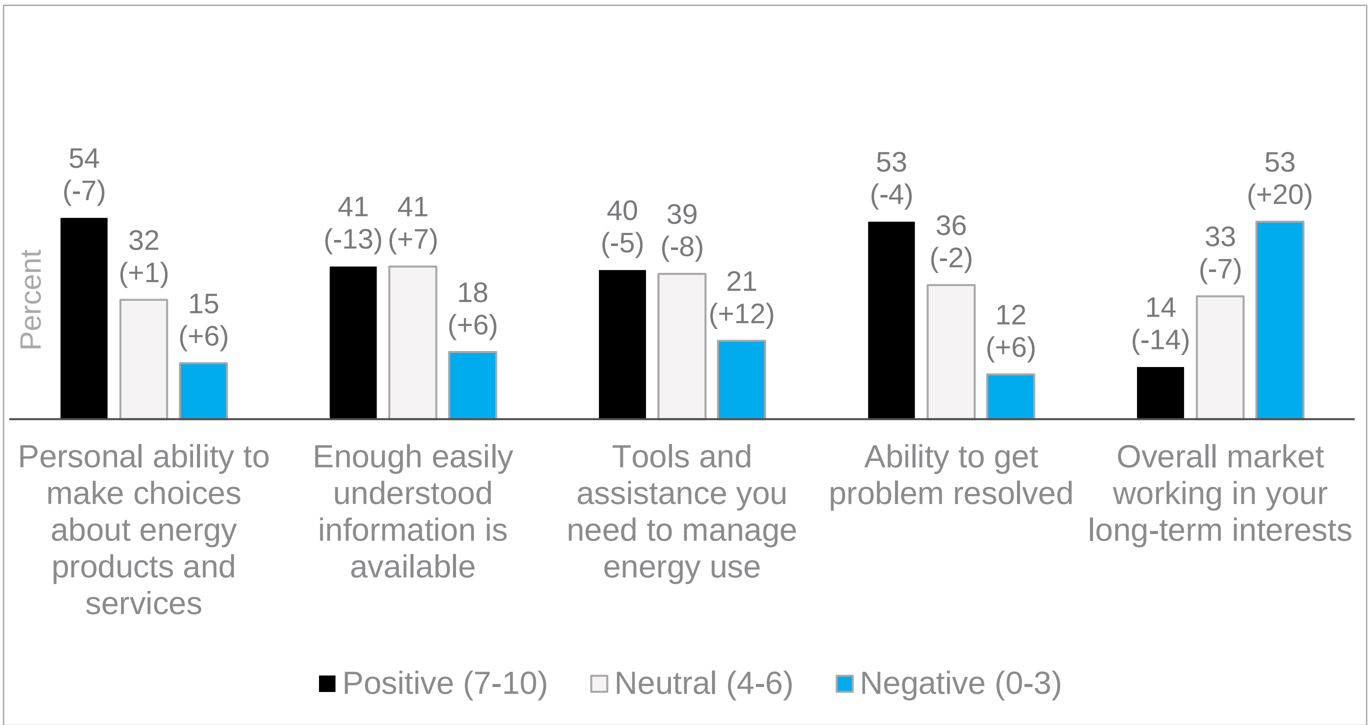
Confidence

Confidence in information and tools

Confidence in the energy market has halved in the ACT and consumers lack confidence that there is enough easily understood information available about energy services.

- 14% say they are confident in the overall market working in their long-term interests (down 14% from April 2017).
- 41% say they are confident that there is enough easily understood information available (down 13%).

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



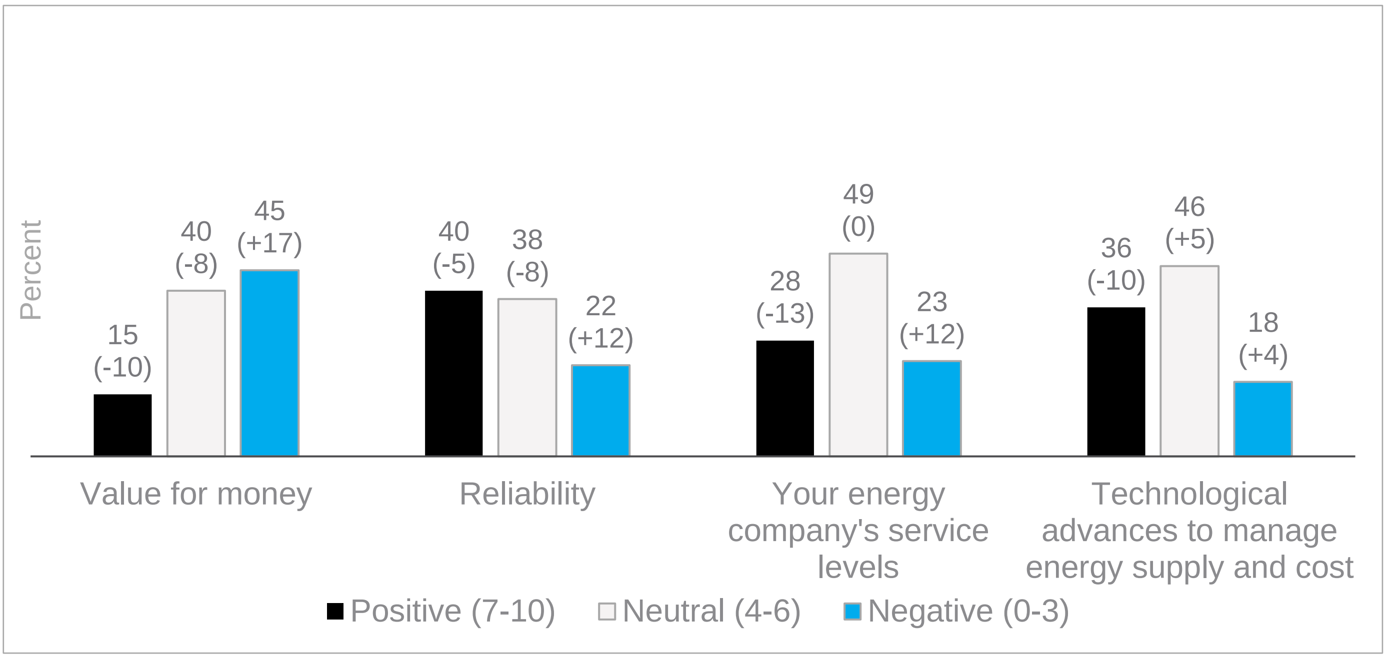
Confidence

Confidence in long term outcomes

ACT household consumers in this survey are less likely than those in last year's survey to say they are confident energy market outcomes will improve in the future.

- 28% say they are confident that service levels will improve in the future (down 13%).
- 15% are confident they will get better value for money in the future (down 10%).
- 36% say they are confident in future technological advances to manage energy supply (down 10%).
- 40% say they are expecting reliability of energy services to improve (down 5%).

"Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of…?"
0-10 scale, 0='not at all confident', 10='very confident'

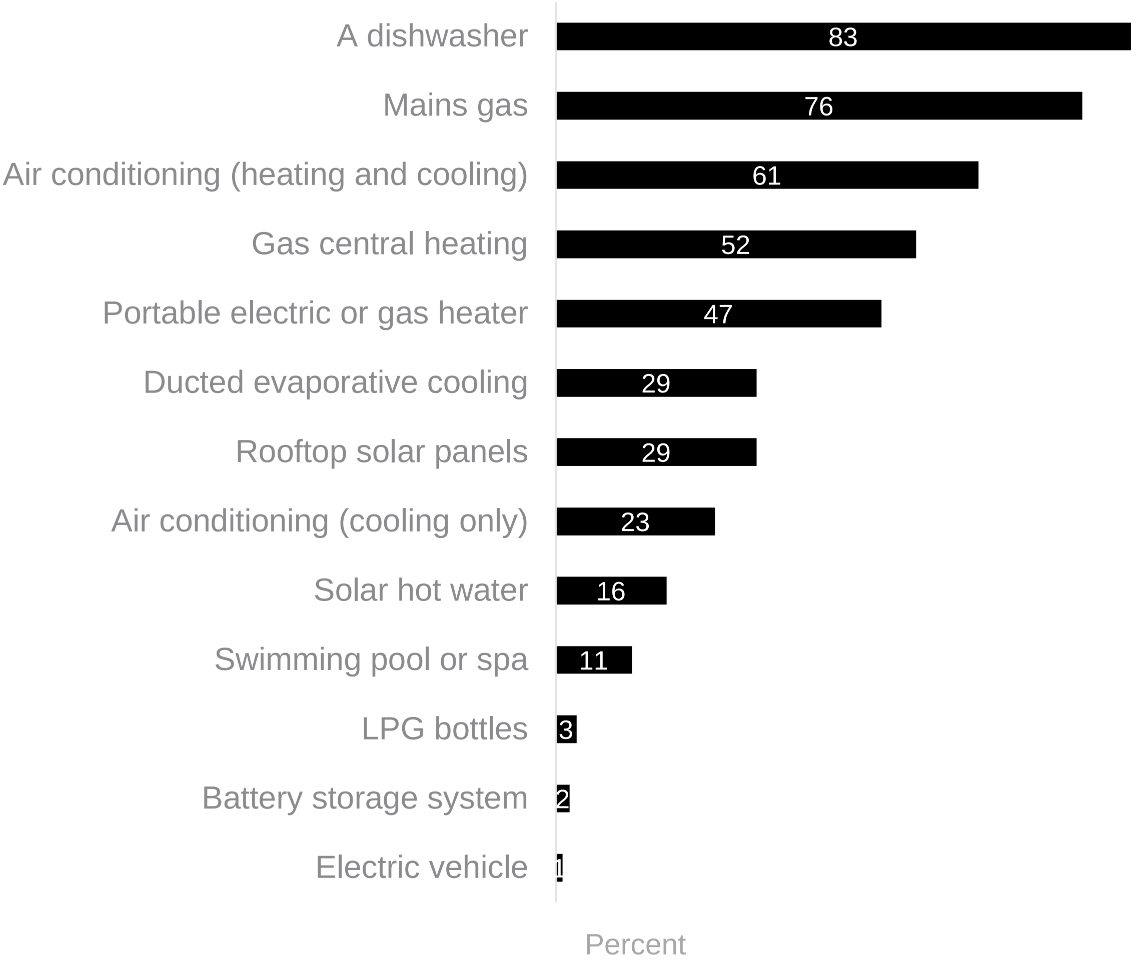


Use of technologies

ACT household consumers use a variety of cooling and heating technologies.

- 76% say that they have mains gas, and 52% have gas central heating.
- 61% say that they have air conditioning for both heating and cooling.
- 47% say they have a portable electric or gas heater.

Which of the following do you have at your home?



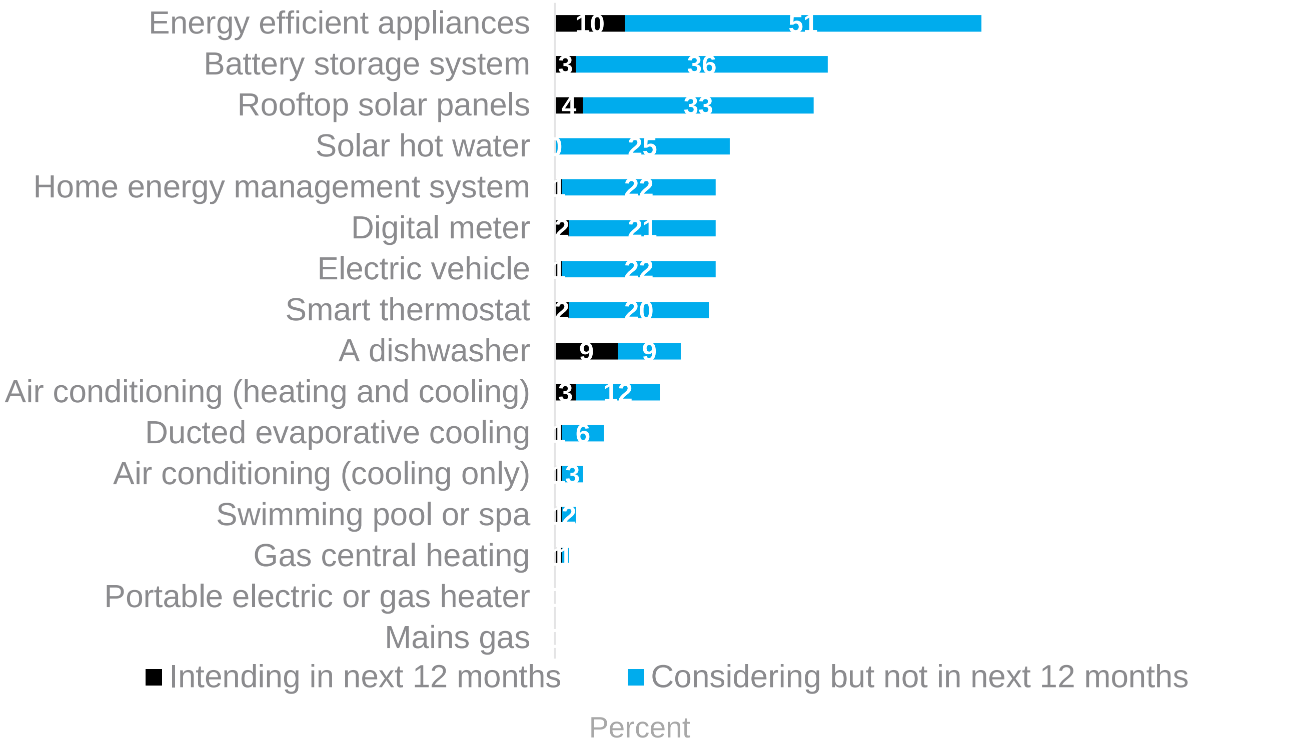
Activity

Uptake of technologies

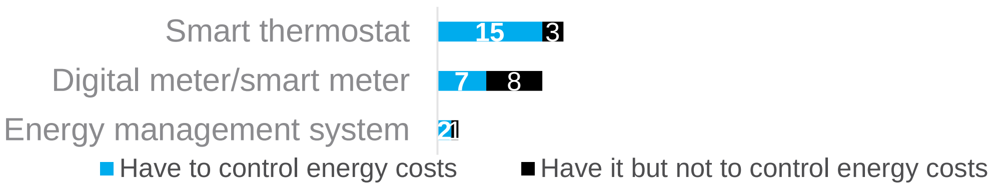
ACT household consumers show interest in purchasing more energy efficient appliances in the future, but not immediately.

- 61% say that they are considering energy efficient appliances, though only 10% plan to purchase them in the next 12 months.
- 39% say that they are considering a battery storage system, though only 3% plan to purchase them in the next 12 months.

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



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



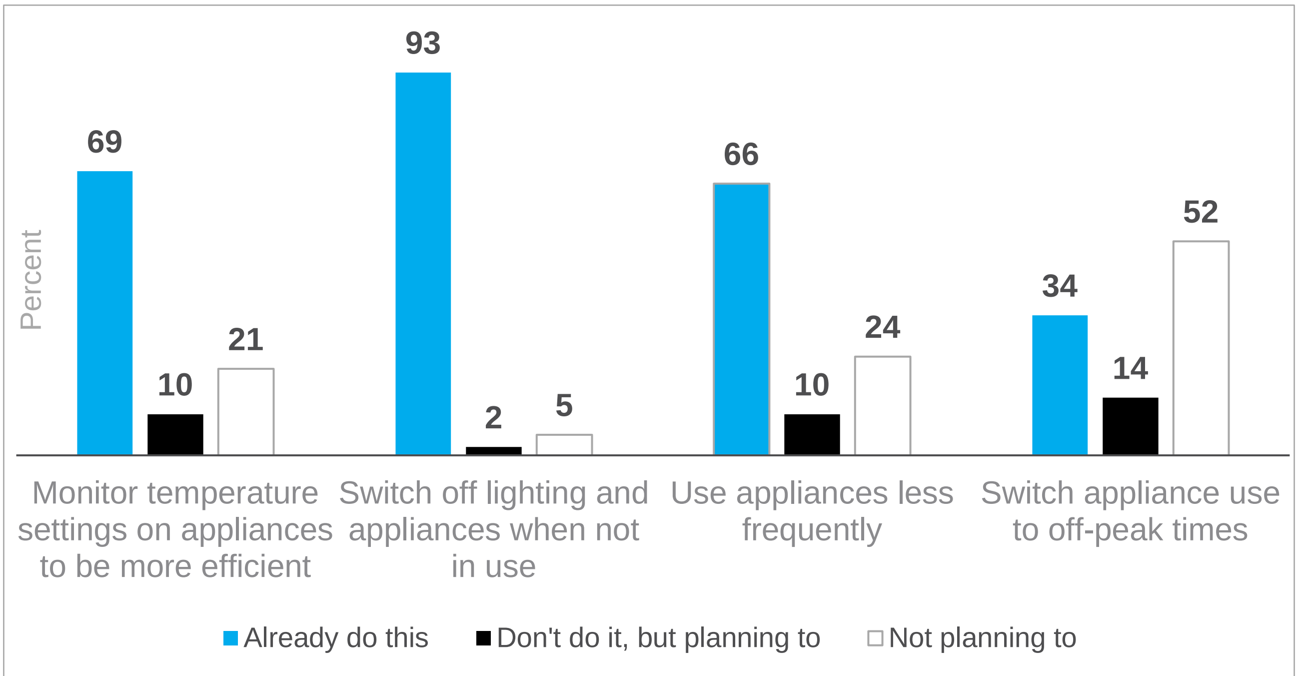
Activity

Energy saving practices

ACT household consumers are actively trying to manage their energy use

- 93% say that they switch off lighting and appliances when not in use.
- 34% say that they already have switched appliance use to off-peak times.

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



Activity

Reasons for considering switching

12% of ACT household consumers switched energy companies or plans in the last year, and 16% intend to switch energy companies or plans in the next year.

Note: As fewer than 10 ACT respondents reported switching energy companies in the past three years, the chart on reasons for switching has been omitted

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

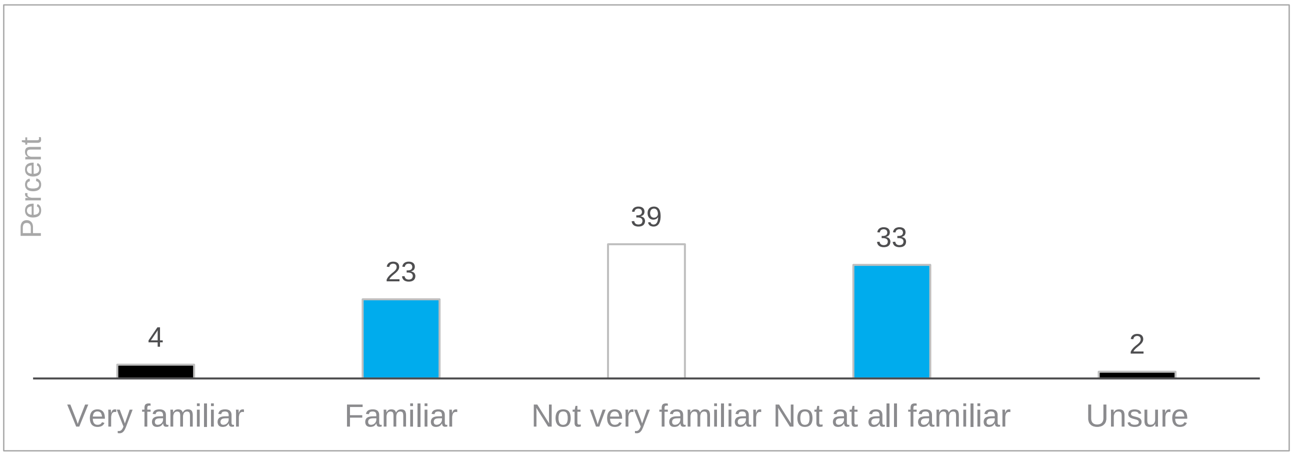
Base: All consumers (n=198)

Other

Awareness of the Energy Ombudsman

27% say that they are familiar with the Energy Ombudsman.

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



Western Australia

Satisfaction

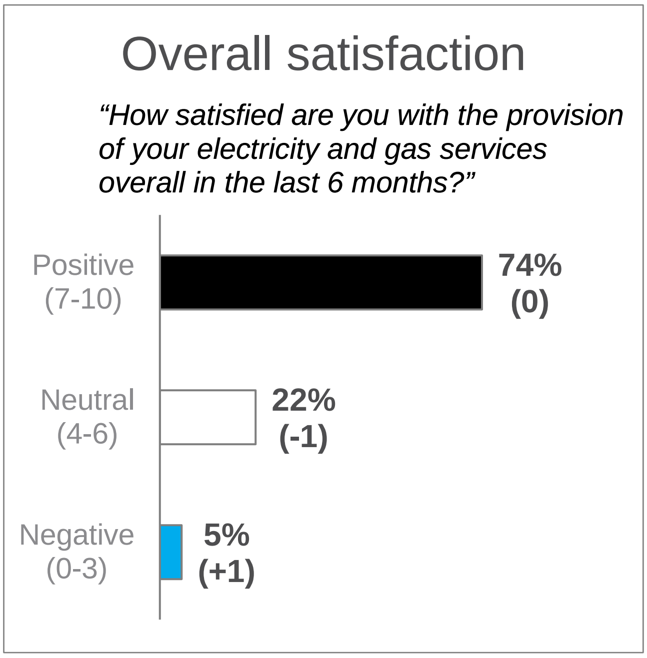
Overall satisfaction

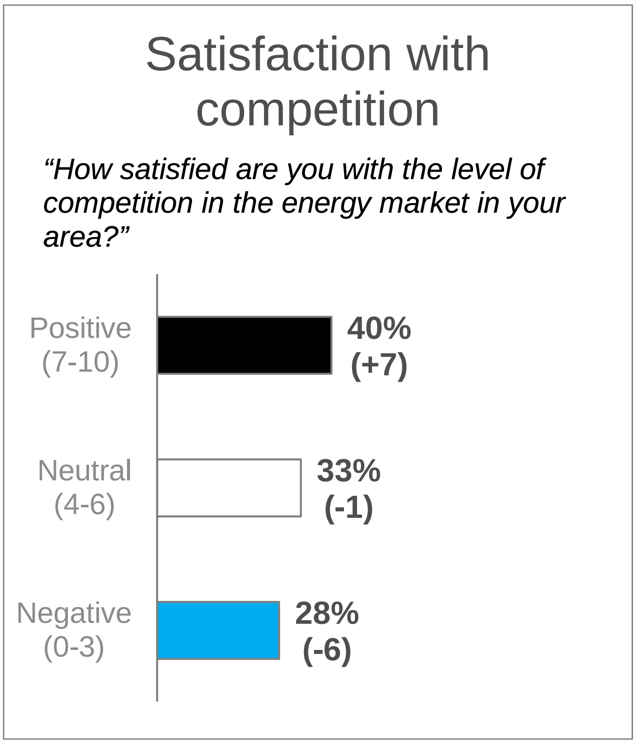
Overall satisfaction with electricity and gas services amongst Western Australian household consumers is unchanged.

- 74% are satisfied overall, the same as in April 2017.

There has been an increase in satisfaction with the level of competition in the energy market.

- 40% now say they are satisfied, up 7% from April 2017.





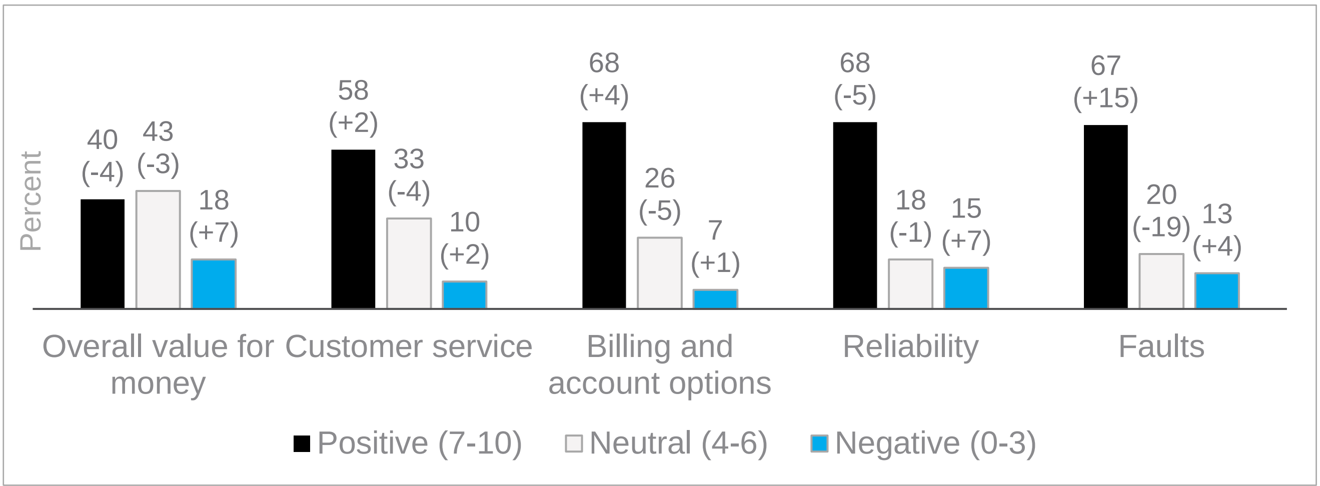
Satisfaction

Satisfaction with electricity

Satisfaction with fault resolution has increased sharply.

- 67% say they are satisfied with their electricity fault resolution, up 15% from April 2017.
- 68% say they are satisfied with reliability, down 5%.
- 40% are satisfied with overall value for money (down 4%).

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



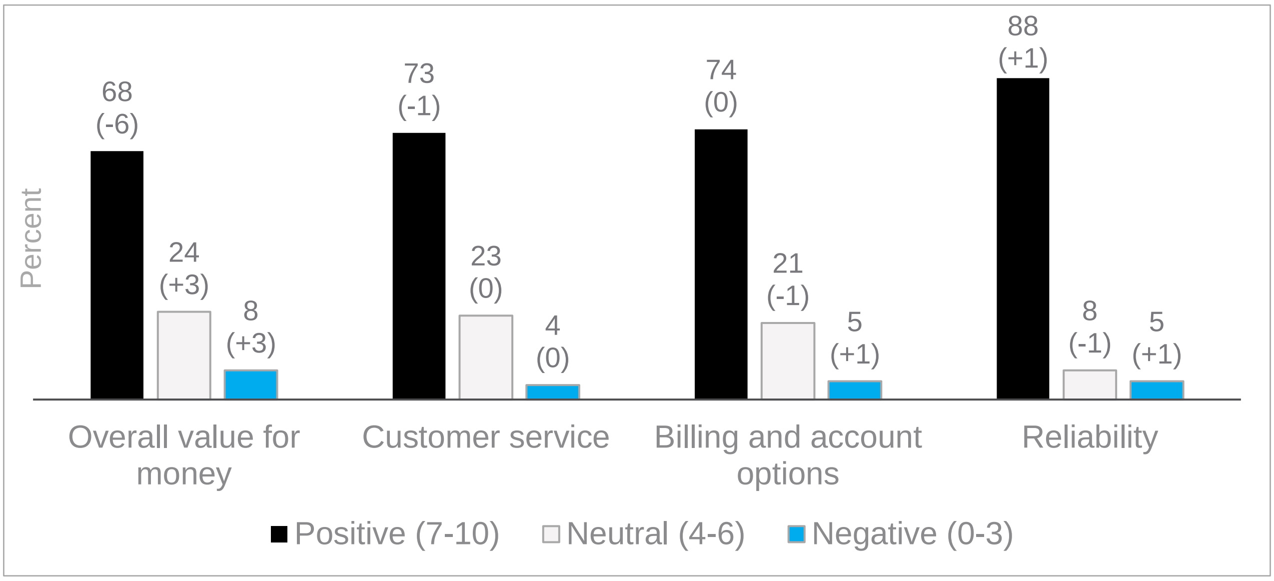
Satisfaction

Satisfaction with gas

Satisfaction with the overall value for money of gas has dropped for Western Australian household consumers.

- Satisfaction with overall value for money has dropped 6% to 68%.
- All other measures are largely unchanged.

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



Base: WA consumers with gas (n=177)

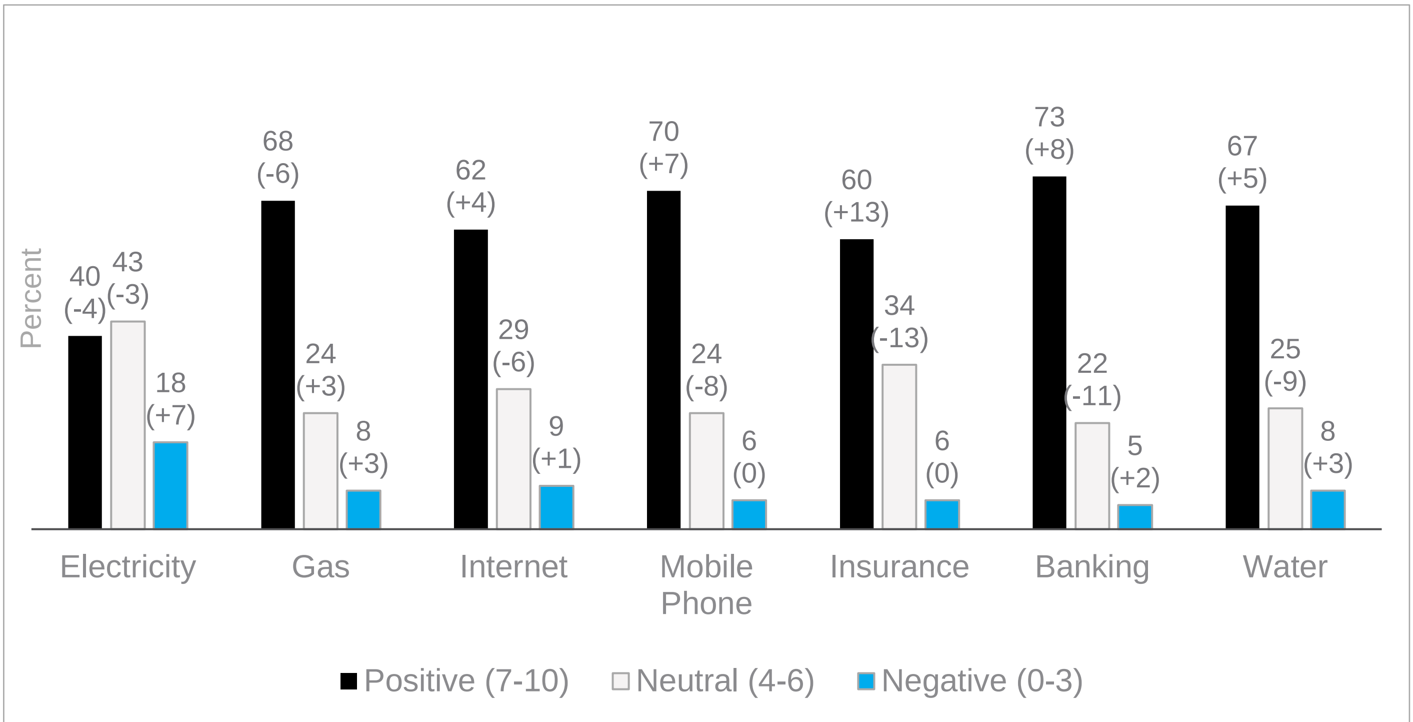
Satisfaction

Satisfaction with utilities and services

Satisfaction with electricity trails other utilities and services in terms of value for money.

- Satisfaction with electricity (40%) continues to trail other utilities and services in the survey in terms of value for money. The next lowest satisfaction rating is 60%, for insurance.
- At 68% satisfied, satisfaction with gas is superior to that of insurance, internet and 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'



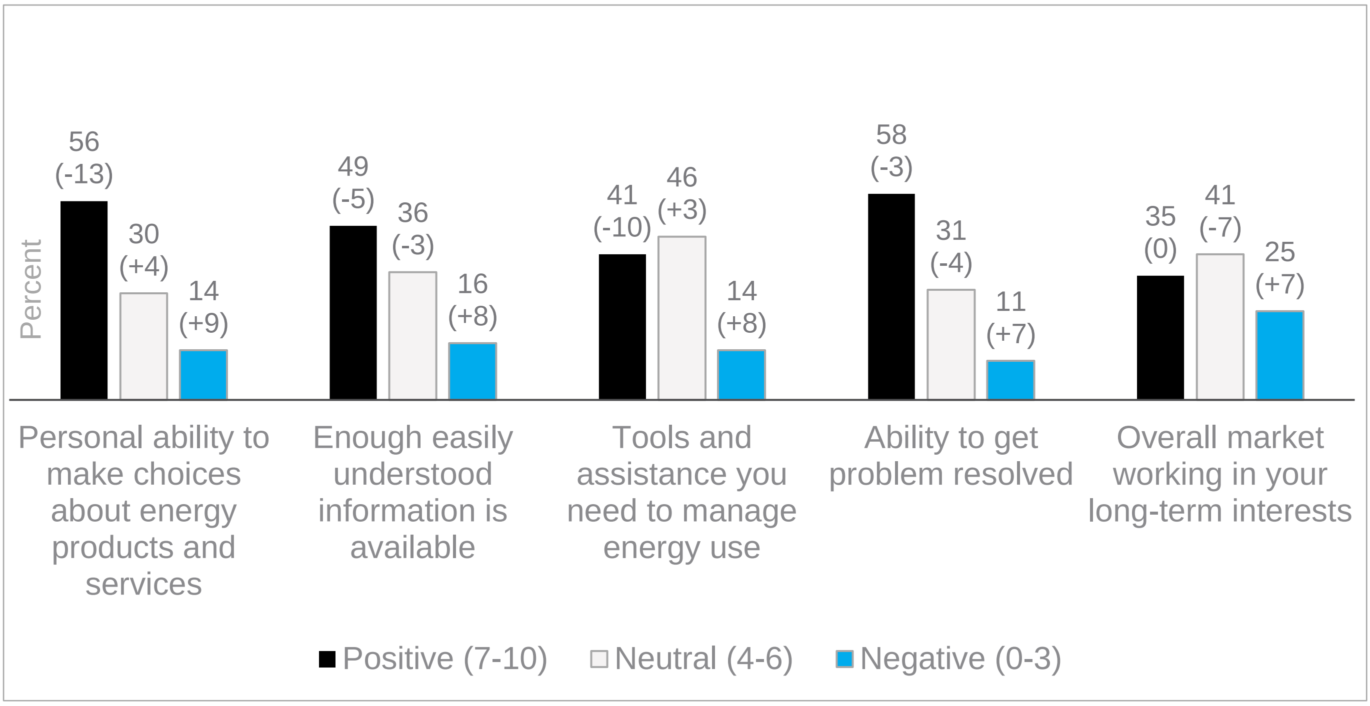
Confidence

Confidence in information and tools

Confidence in information and tools has dropped or remained the same across all measures for WA consumers.

- 56% now say they are confident in their own ability to make choices about energy products, down 13%.
- 41% now say they are confident in the tools and assistance they need to manage energy use, down 10%.
- 49% now say they are confident that there is enough easily understood information available, down 5%.
- There is no change in the proportion of consumers reporting confidence that the market is working in their interests (35%)

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



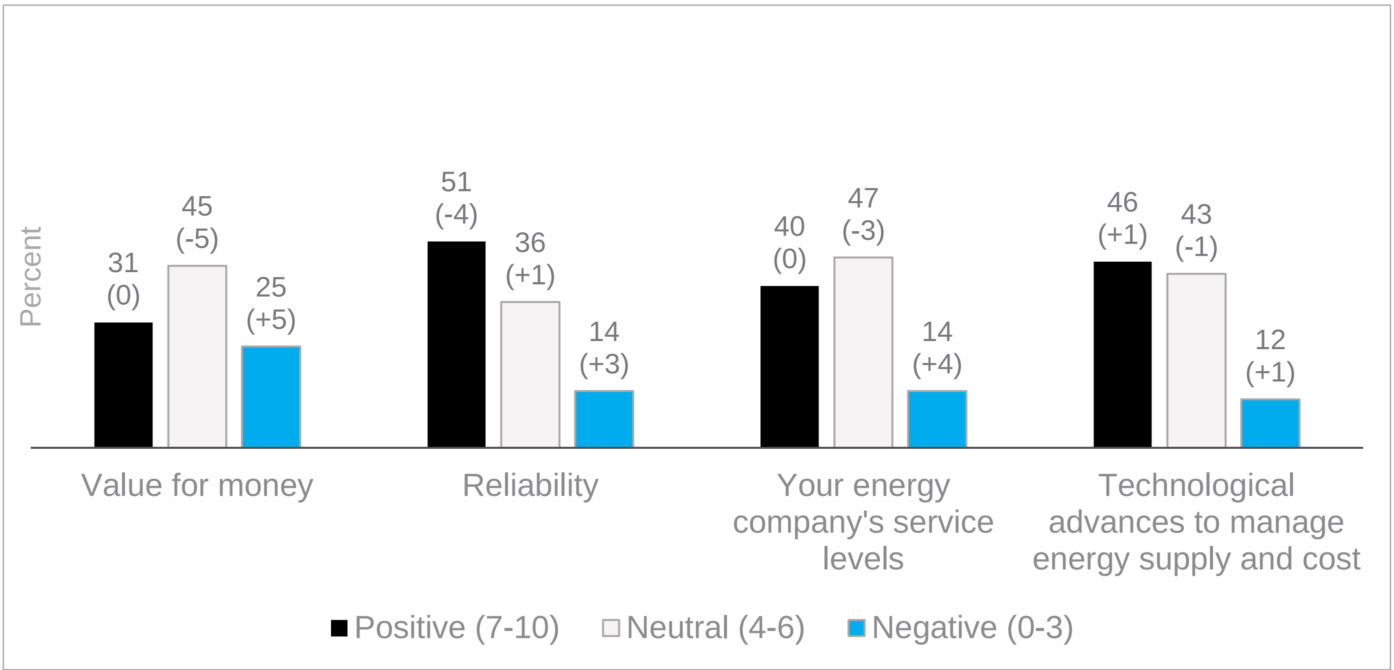
Confidence

Confidence in long term outcomes

Confidence in the market providing positive long-term outcomes for reliability has dropped for WA consumers.

- 51% said they were confident the market would provide greater reliability (down 4%).
- All other measures in this section were largely unchanged.

"Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of…?"
0-10 scale, 0='not at all confident', 10='very confident'



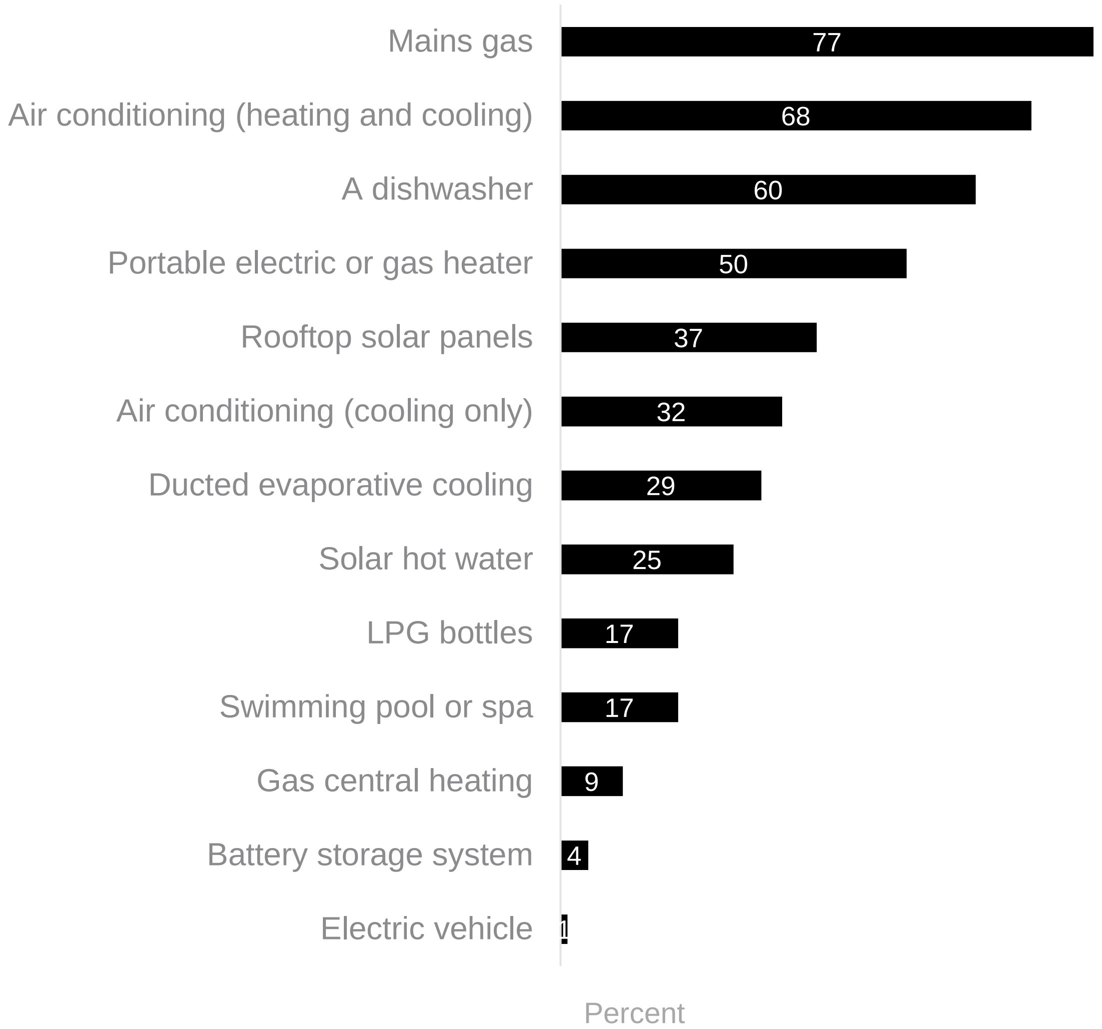
Activity

Use of technologies

WA households prefer air conditioning over gas heating.

- 77% claim to have mains gas, but only 9% use it for gas central heating.
- 68% say that they have air conditioning for both heating and cooling.

Which of the following do you have at your home?



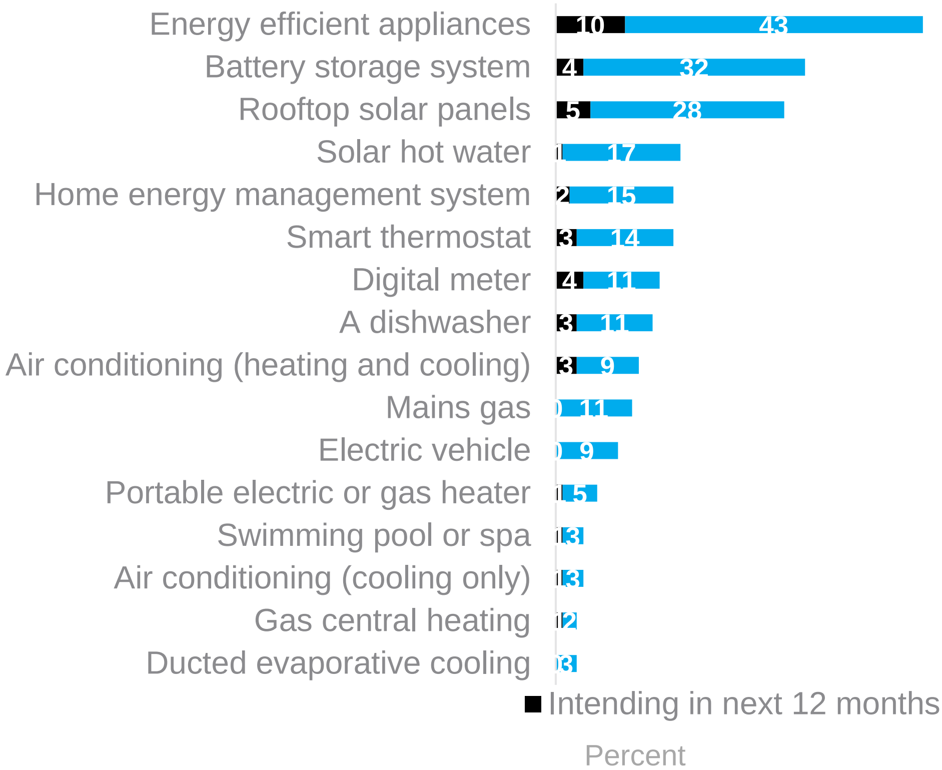
Activity

Uptake of technologies

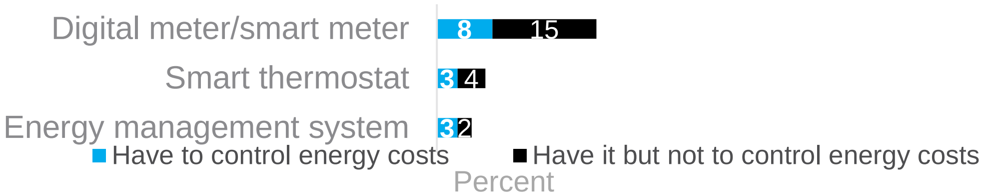
WA household consumers show interest in purchasing more energy efficient appliances, though not immediately.

- 53% say that they are considering energy efficient appliances, but only 10% intend to purchase them in the next 12 months.
- 36% claim to be considering a battery storage system, but only 4% intend to purchase one in the next 12 months.

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



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



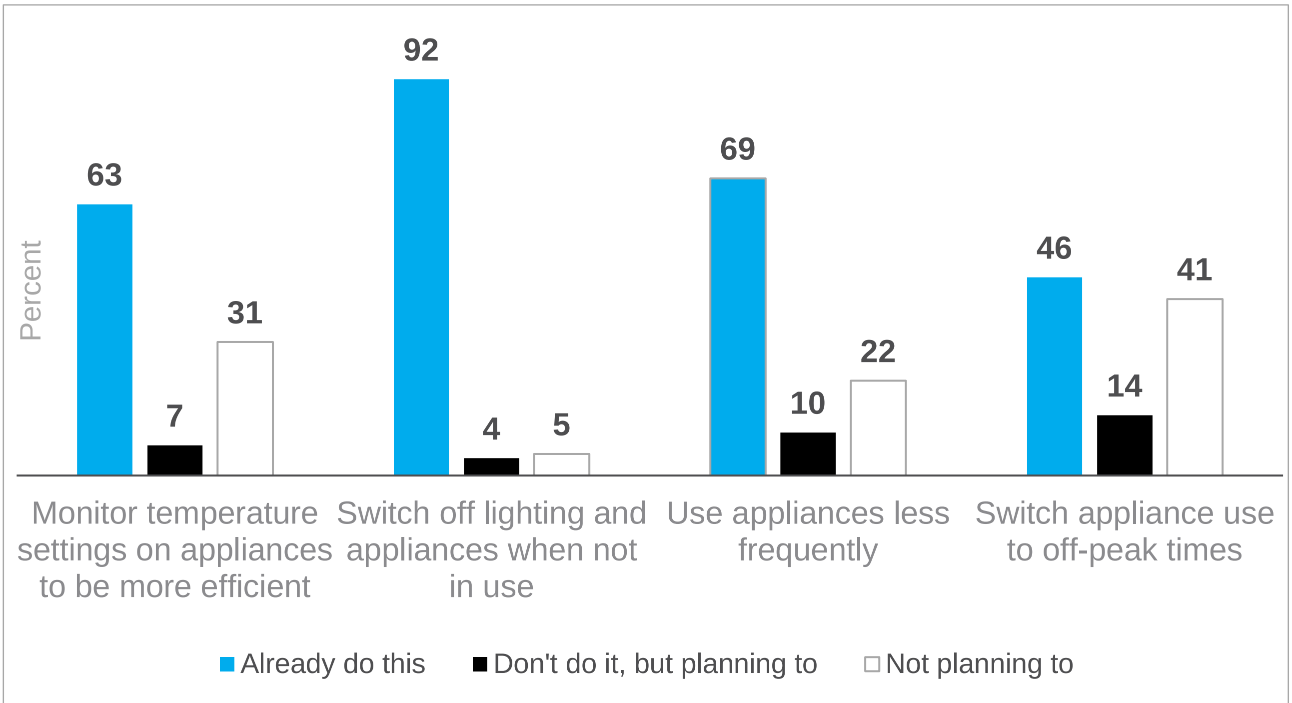
Activity

Energy saving practices

WA consumers are engaging in a variety of energy saving practices.

- 92% say that they already switch of lighting and appliances when not in use.
- 46% say that they have already switched appliance use to off-peak times.

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



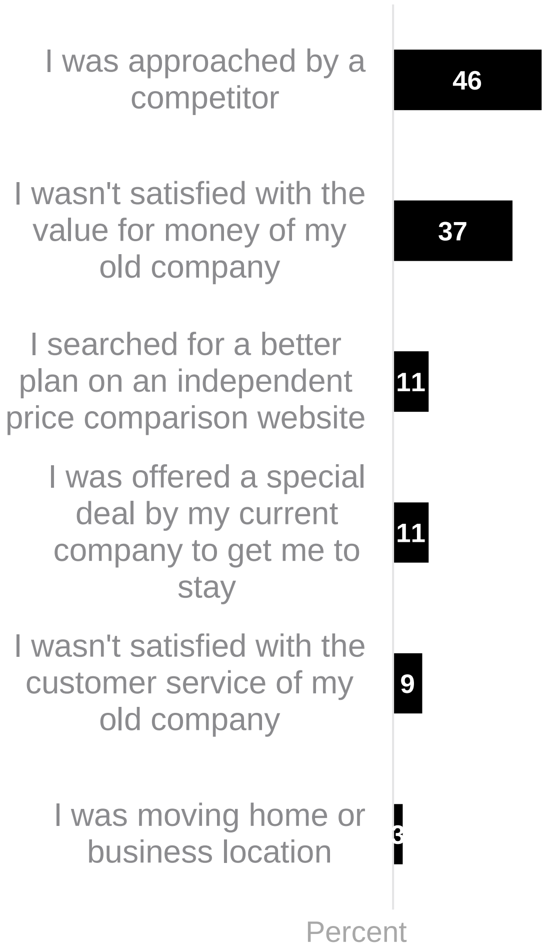
Activity

Reasons for considering switching

Being approached by a competitor is a common occurrence when considering switching in WA.

- 46% of those who switched in the last 3 years said that they did so because they were approached by a competitor.
- 13% of household conusmers in WA switched energy companies or plans in the last 12 months.
- 15% plan to switch energy companies in the next 12 months.

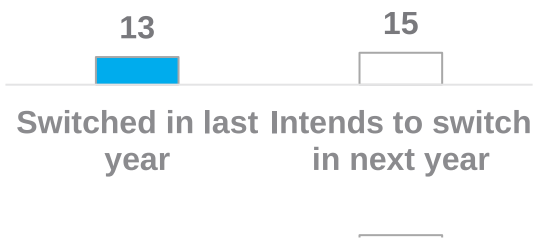
Thinking of the last time you were looking at switching energy companies, which of the following apply to you?



Base: Consumers who switched retailers in the last 3 years (n=35)

Note: small sample size

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



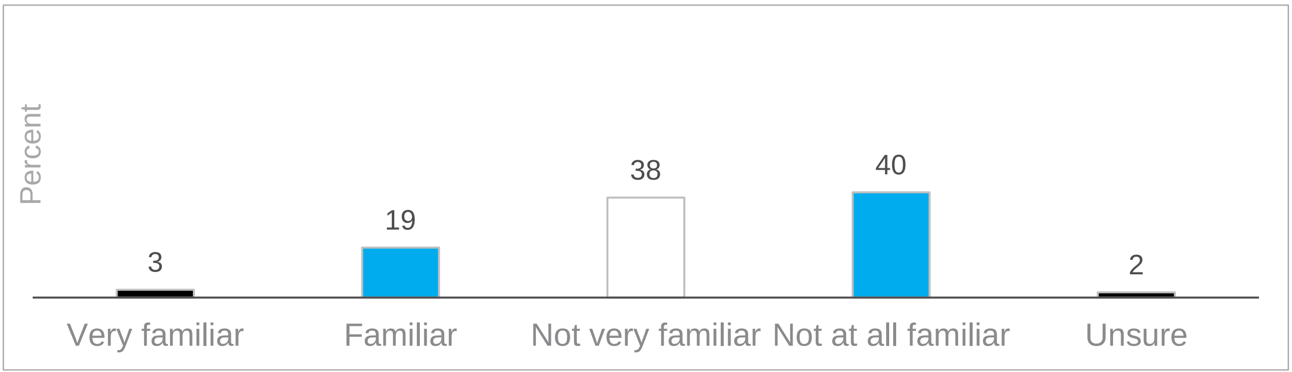
Base: All consumers (n=200)

Other

Awareness of the Energy Ombudsman

22% say they are familiar with the Energy Ombudsman.

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



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Energy Consumers Australia

Energy Consumer Sentiment Survey
April 2018

QUESTIONNAIRE

Appendix A: Survey

ASK ALL

TERMINATE IF S1A=8 (rather not say)

S1a Which of the following best describes your employment status?

Please select one only

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

ASK ALL

If S1a ONLY contains codes 4 or 5 or 6 or 7 AND S1=3 then terminate.

AFTER REACH N=280 FOR BUSINESS QUOTA, IF S1A = 1 OR 2 OR 3 AND S1 =3 THEN TERMINATE

S1 Which of the following best describes you?:

Please select one only

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

ASK ONLY IF S1a contains codes 1 or 2 or 3

If S2=3 then terminate

IF BUSINESS QUOTA REACHES N=280 AT dType THEN we need skip S2

If S1a ONLY contains code 1 or 2 or 3 AND S1≠3 AND S2=3 THEN DO NOT TERMINATE at S2.can be classified as Consumer

S2 Which of the following best describes you:

Please select one only

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

ASK ALL

S3 Are you:

Please select one only

1. Male
2. Female

ONLY ASK IF S1=1 OR 2

TERMINATE IF S4=1

S4. How old are you:

Please select one only

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

ASK ALL [Delete if S5a means that this is unnecessary]

S5. Where do you live?

Please select one only

1. Sydney
2. Other New South Wales
3. Melbourne
4. Other Victoria
5. Brisbane

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6. Other Queensland
7. Perth
8. Other Western Australia
9. Adelaide
10. Other South Australia
11. Hobart
12. Other Tasmania
13. Darwin
14. Other Northern Territory
15. ACT

ASK ALL

S5a What is your household's postcode?

[Openender, limit to valid ranges]

ASK ONLY IF S2=1 OR 2

IF S1a=1 or 2 or 3 AND S1=3 AND S6=4 then TERMINATE

IF BUSINESS QUOTA REACHES N=280 AT dType THEN we need skip S6

S6 How many people are employed in your business?

Please select one only

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

HIDDEN QUESTION

IF S1A=4 OR 5 OR 6 OR 7 AND S1=1 OR 2 THEN ONLY PUNCH CODE1: CONSUMER

IF S6 = 1 OR 2 OR 3: PUNCH CODE 2 (BUSINESS)

If S1A=1 or 2 or 3 AND S1=1 or 2 AND S6=4 then PUNCH CODE 1: Consumer (we don't want to waste respondents so if they are not qualified for Business quota then route to the Consumer quota)

If S1a ONLY contains code 1 or 2 or 3 AND S1≠3 AND S2=3 THEN DO NOT TERMINATE. HE/SHE MAY QUALIFIED FOR CONSUMER SEGMENT.

AND mark as "Consumer" at dType

IF BUSINESS QUOTA REACHES N=280 FOR CODE 2 THEN ROUTE THEM TO THE CONSUMER QUESTIONS: S1.

dType**. Record a respondent belongs to Business or consumer group**

1. **Consumer**
2. **Business**

[END OF SCREENER]

SECTION 2: CURRENT USAGE

ASK ONLY IF DType=2

U1 Does your business operate primarily from:

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

ASK IF DType=1 OR IF DType=2 AND U1=1 or 3

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

1. Natural gas (mains gas)
2. Liquified Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Rooftop solar panels
4. A battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
5. A swimming pool or spa pool
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)

8. A ducted evaporative cooling system
9. Gas central heating
10. A portable electric or gas heater
11. An electric vehicle
12. Solar hot water
13. A dishwasher

[Yes / No]

ASK IF DType=1 OR IF DType=2 AND U1=1 or 3

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

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

[Responses]

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

ASK ONLY IF DType=2 AND U1=2

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

1. Natural gas (mains gas)
2. Liquified Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Rooftop solar panels
4. A battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
5. Energy intensive production processes, plant or equipment (e.g. large refrigeration systems, irrigation pumps, industrial cooking equipment, large machines etc. – excluding vehicles.)

ASK ONLY IF DType=2 AND U1=2

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

A. A digital meter for your electricity supply, also known as a smart meter
B. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
C. An energy management system (a product that monitors, controls or analyses energy use in your business premises)

[Responses]

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

SECTION 3: ELECTRICITY

SHOW IF DTYPE =2

INFO1

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

ASK ALL

E1 How would you rate the overall value for money of the products and services provided by your electricity company in the past 6 months? Please use a scale where 0 means very poor and 10 is excellent. (SR)

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

0=Very Poor to 10=Excellent

ASK ALL

E2 How satisfied are you with the following? (SR)

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

A. The overall quality of customer service provided by your electricity company in the past 6 months
B. The billing and account options (such as the option of

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monthly billing, online accounts etc) currently available to you from your electricity supplier

C. The number of times you've had loss of power, blackout or other faults with your electricity supply in the past 6 months

0=Very Dissatisfied to 10=Very satisfied

ASK IF E2C DOES NOT = 10

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

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

0=Very Dissatisfied to 10=Very satisfied + N/A, haven't had any faults

SECTION 4: GAS

ONLY ASK THIS SECTION IF U2 = 1 or 2, OR IF U3 = 1 or 2

ELSE SKIP TO SECTION 5

[Logic check: all questions in section 4 asked only of those who say they have mains or LPG gas at their household or business. If they do not have gas, they skip to Section 5]

SHOW IF DTYPE =2

INFO2

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

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

Please select one only

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

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

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

0=Very Poor to 10=Excellent

G3 How satisfied are you with the following? (SR)

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

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

0=Very Dissatisfied to 10=Very satisfied

SECTION 5: OVERVIEW

SHOW INFO2 IF DTYPE =2

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

ASK ALL

SC

O1 How satisfied are you with the following? (SR)

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

A. The provision of your electricity and gas services overall over the last 6 months
B. 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.

0=Very Dissatisfied to 10=Very satisfied

SHOW INFO2 IF DTYPE =2

Again, please respond in relation to your business electricity and gas accounts

SHOW TO ALL

INFO3

I now would like to ask you a question about some services not related to your energy and gas.

ASK ALL

SHOW ALL 5 CODES ON SAME PAGE

O2 How would you rate the overall value for money of the products and services provided by your service provider in the following areas, in the past 6 months? (SR per ROW)

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

A. Your internet service
B. Your mobile phone service
C. Your insurance services
D. Your banking services
E. Your water services

0=Very poor to 10=Excellent

ASK IF DTYPE =2

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

A. One of your biggest overheads
B. Substantial, but not one of your biggest overheads
C. A minor expense in the scheme of things

SECTION 6: ACTIVITY

ASK FOR THOSE WHERE U2='no' OR U4='do not have it' – IF ITEM IS NOT INCLUDED AT U2 or U4, ASK ALL

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

A. Natural gas (mains gas)
B. Rooftop solar panels
C. A battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
D. An electric vehicle
E. A swimming pool or spa pool
F. Air conditioning (for cooling only)
G. Air conditioning (for cooling and heating)
H. Gas central heating
I. A ducted evaporative cooling system
J. A portable electric or gas heater
K. Appliances that are more energy efficient
L. A digital meter for your electricity supply, also known as a smart meter
M. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
N. A home energy management system (a product that monitors, controls or analyses energy use in your home)
O. Solar hot water
P. A dishwasher

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

ASK FOR THOSE WHERE U3='no' OR U5='do not have it' – IF ITEM IS NOT INCLUDED AT U3 or U5, ASK ALL

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

A. Natural gas (mains gas)
B. Rooftop or other solar panels
C. A battery storage system (used to store electricity from the grid or electricity generated on site – especially solar electricity)
D. Electric vehicles
E. Appliances, equipment or machinery that are more energy efficient

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

ASK FOR ALL THOSE RATED '1' or '2' AT A1 OR A2

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

[Select all that apply]

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A. Rooftop solar panels
B. A battery storage system (used to store electricity from the grid or electricity generated on site – especially solar electricity)
C. An electric vehicle
D. [Household] Appliances that are more energy efficient
E. [Business] Appliances or machinery that are more energy efficient
F. A digital meter for your electricity supply, also known as a smart meter
G. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
H. An energy management system (a product that monitors, controls or analyses energy use in your home or business)
I. Solar hot water

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

ASK ALL

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

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

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

ASK ALL

A4 Which of the following do you do or plan to do? (select all that apply)

Please select all that apply

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

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

A5a Which of the following have you done?

A. Switched energy companies
B. Switched energy plans with the same company
C. Looked at switching energy companies, but decided not to switch at that time
D. Looked at switching energy plans with the same company, but decided not to switch at that time

1. Yes
2. No

[Ask A5b if A5a (A) = Yes

A5b When did you switch energy companies?

1. In the last year
2. In the last 2-3 years
3. More than 3 years ago

[Ask A5c if A5a (B) = Yes

A5c When did you switch energy plans with the same company?

1. In the last year
2. In the last 2-3 years

3. More than 3 years ago

ASK ONLY IF A5b = 1 or 2A6 Thinking about the last time you were looking at switching energy companies, which of the following apply to you:

A. I was moving home or business location
B. I wasn't satisfied with the value for money of my old company
C. I was offered a special deal by my current company to get me to stay
D. I was approached by a competitor
E. I searched for a better plan on an independent price comparison website
F. I wasn't satisfied with the customer service of my old company

ASK ONLY IF A5a(c) =Yes

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

[Openended question]

ASK ALL

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

Please select one only

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

SECTION 7: CONFIDENCE

SHOW INFO2 IF DTYPE =2

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

ASK ALL

C1. How confident do you feel in the following:

A. Your ability to make choices about energy products and services, such as which plan or supplier to choose
B. That there is enough easily understood information available to you to make decisions about energy products and services, by which we mean information available on the internet, through energy comparison websites or elsewhere
C. That you have the tools and assistance you need to manage your energy use and costs, by which we mean electricity meters, smart phone devices, apps or other tools.
D. Your ability to get a problem with your energy services resolved through your energy company or a third party

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

0=Not at all confident to 10=Very confident

ASK ALL

C2. How confident are you that the overall market is working in your long-term interests? By 'the market' we mean, the energy industry and energy regulators. Please use a scale where 0 means not at all confident and 10 is very confident~~.~~ (SR)

Please click and drag the marker to the appropriate point on the scale. The 'Next' button will not appear until all statements have an answer

0=Not at all confident to 10=Very confident

ASK ALL

C3. Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of: (SR per ROW)

A. Value for money
B. Reliability (blackouts and restoration of supply) of power supply
C. Your energy company's customer service levels
D. Technological advances to manage your energy supply and costs

Please select one only

0=Not at all confident to 10=Very confident

ASK ALL

OE - TEXT

C4. If you had a complaint about your electricity or gas services which you could not resolve by talking to your retailer or network company, which people or

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organisation[s] would you contact?

ASK ALL

[Set routing so respondents cannot change answer to C4 once they have seen C5)

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

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

ASK ALL

C6 How familiar are you with an organisation called Energy Consumers Australia? (SR)

Please select one only

1. Very familiar
2. Familiar
3. Not very familiar
4. Not at all familiar

97. Don't know

SECTION 8: DEMOGRAPHICS – HOUSEHOLD CONSUMERS

IF DTYPE = 1, ASK D1 to D18

IF DTYPE = 2, ASK B1 to B4

IF U2(1) = Yes – i.e. they have natural gas

D1 Do you get separate bills for electricity and gas?

[Yes / no]

IF U2(1) = No (i.e. they do not have natural gas) OR D1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

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

Please select one only

1. Less than $100
2. $100 to $199
3. $200 to $299
4. $300 to $399
5. $400 to $499
6. $500 to $599
7. $600 to $699
8. $700 to $799
9. $800 to $899
10. $900 to $999
11. $1000 or more

97. Don't know

96. Prefer not to say

IF U2(1) = No (i.e. they do not have natural gas) OR D1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

D3 How many months did that bill cover?

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

IF D1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

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

Please select one only

1. Less than $100
2. $100 to $199
3. $200 to $299
4. $300 to $399
5. $400 to $499
6. $500 to $599
7. $600 to $699
8. $700 to $799
9. $800 to $899
10. $900 to $999
11. $1000 or more

97. Don't know

96. Prefer not to say

IF D1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

D5 How many months did that bill cover?

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

IF D1= No (i.e. they have natural gas and do not get separate bills for electricity and gas)

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

Please select one only

1. Less than $100
2. $100 to $199
3. $200 to $299
4. $300 to $399
5. $400 to $499
6. $500 to $599
7. $600 to $699
8. $700 to $799
9. $800 to $899
10. $900 to $999
11. $1000 or more

97. Don't know

96. Prefer not to say

IF D1= Yes (i.e. they have natural gas and do not get separate bills for electricity and gas)

D7 How many months did that bill cover?

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

ASK ALL FOR DTYPE = 1

D8 Which if any of the following apply to you?

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

[Yes / no]

D19 An earlier question asked whether or not you were considering making changes to reduce your electricity usage, such as changing the times when you use appliances or monitoring the temperature of air conditioning etc. more closely. Which of the following increases in your electricity bill do you think would make you more likely to try to reduce your electricity usage:

[Grid question]

A. A 5% increase
B. A 10% increase
C. A 15% increase
D. A 20% increase
E. A 25% increase

[Codes]

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

Note – the actual survey presents D19 as 5 separate questions (D19a, D19b etc.) – one for each of the options A-E (in the order shown above)

ASK ALL FOR DTYPE = 1

D9 What is your household income? (SR)

Please select one only

1. Less than $20,000
2. $20,000 to under $40,000
3. $40,001 to under $60,000
4. $60,001 to under $80,000
5. $80,001 to under $100,000
6. $100,001 to under $120,000
7. $120,001 to under $150,000
8. $150,001 or more

97. Don't know

96. Prefer not to say

ASK ALL FOR DTYPE = 1

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

Please select one only

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

ASK ALL FOR DTYPE = 1

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

Please select one only

1. Yes
2. No

ASK ALL FOR DTYPE = 1

D12 How many people live in your household? (SR)

[enter number]

ASK ALL FOR DTYPE = 1

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

Please select one only

1. Live in your own home
2. Rent

98. Other

ASK ALL FOR DTYPE = 1

D14 Which of the following best describes where you live? (SR)

Please select one only

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

98. Unsure

ASK ALL FOR DTYPE = 1

D15 Which decade was your home built in? (SR)

Please select one only

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

98. Unsure

ASK ALL FOR DTYPE = 1

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

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

ASK ALL FOR DTYPE = 1

D17 Which if any of the following apply to you:

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

1. Yes
2. No

97. Don't know

96. I'd rather not say

ASK ALL FOR DTYPE = 1

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

1. No, English only
2. Yes

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SECTION 9: DEMOGRAPHICS – BUSINESS CONSUMERS

IF DTYPE = 1, ASK D1 to D18

IF DTYPE = 2, ASK B1 to B10

IF U3(1) = Yes – i.e. they have natural gas

B1 Do you get separate bills for electricity and gas?

[Yes / no]

IF U3(1) = No (i.e. they do not have natural gas) OR B1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

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

Please select one only

1. Less than $1000
2. $1000 to $1499
3. $1500 to $1999
4. $2000 to $2999
5. $3000 to $3999
6. $4000 to $4999
7. $7000 to $7499
8. $7500 to $9999
9. $10,000 or more

97. Don't know

96. Prefer not to say

IF U3(1) = No (i.e. they do not have natural gas) OR B1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

B3 How many months did that bill cover?

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

IF B1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

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

Please select one only

1. Less than $1000
2. $1000 to $1499
3. $1500 to $1999
4. $2000 to $2999
5. $3000 to $3999
6. $4000 to $4999
7. $7000 to $7499
8. $7500 to $9999
9. $10,000 or more

97. Don't know

96. Prefer not to say

IF B1= Yes (i.e. they have natural gas and get separate bills for electricity and gas)

B5 How many months did that bill cover?

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

IF B1= No (i.e. they have natural gas and do not get separate bills for electricity and gas)

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

Please select one only

1. Less than $1000
2. $1000 to $1499
3. $1500 to $1999
4. $2000 to $2999
5. $3000 to $3999
6. $4000 to $4999
7. $7000 to $7499
8. $7500 to $9999
9. $10,000 or more

97. Don't know

96. Prefer not to say

IF B1= Yes (i.e. they have natural gas and do not get separate bills for electricity and gas)

B7 How many months did that bill cover?

6. One month
7. Two months
8. Three months
9. Other
10. Unsure

ASK ALL FOR DTYPE = 2

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

Please select one only

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

ASK IF U1 = 2 (i.e. the operate their business from a fixed location that is not their home)

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

Please select one only

1. Lease
2. Own
98. Other

ASK IF U1 = 2 (i.e. the operate their business from a fixed location that is not their home)

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

Please select one only

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

SECTION 10: CLOSING QUESTIONS

ASK ALL

INFO4

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

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

Energy Consumers Australia would like participants in this survey to provide their NMI numbers. Please note that providing this number is voluntary, and you will still receive your standard incentive even if you do not provide it. You should also be aware that your NMI number is <u>unique</u> – although Energy Consumers Australia has agreed not to use that information in a way that means your household or business could be identified, it would still be possible to do so.

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

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

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

['skip to next question' should go to L3']

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

ONLY ASK L2 IF U2 = 1 or 2, OR IF U3 = 1 or 2, AND IF L1 ≠'skip to the next question'

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

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

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

ASK ALL

INSERT OE

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

Please type your answer into the box below