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Energy Consumers Australia

Energy Consumer Sentiment Survey December 2018

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Notes on methodology

This online survey was in the field from 24 September to 12 October 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).

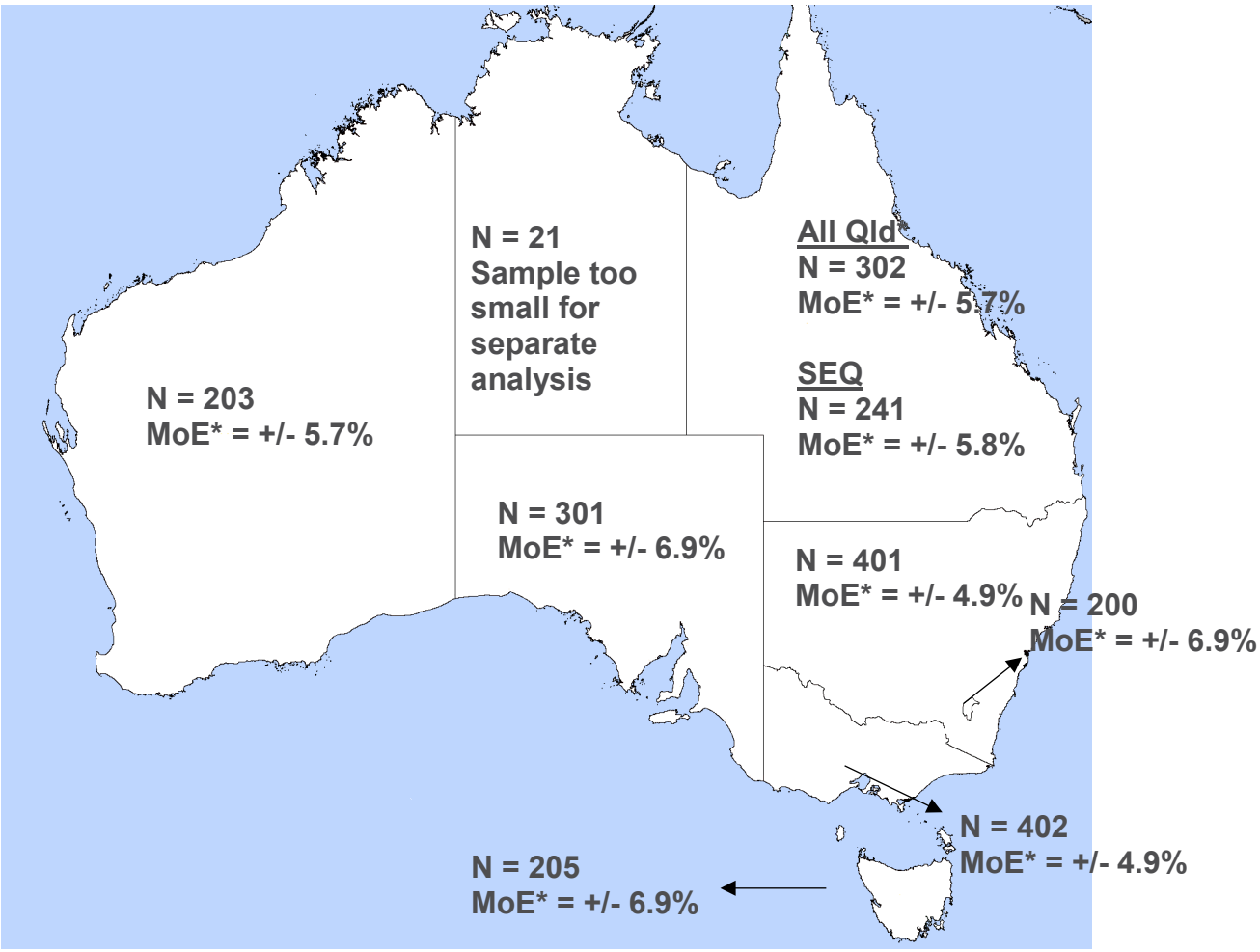
The comparison charts also often include a ‘national average’ for households.

- 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 December 2017 survey in brackets.

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

Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
N=286, MOE* = ±5.9%
(MOE = Margin of Error)
Including N=178 with 19 or fewer employees
and N=108 with 20 or more employees
* 'All Qld' includes SEQ

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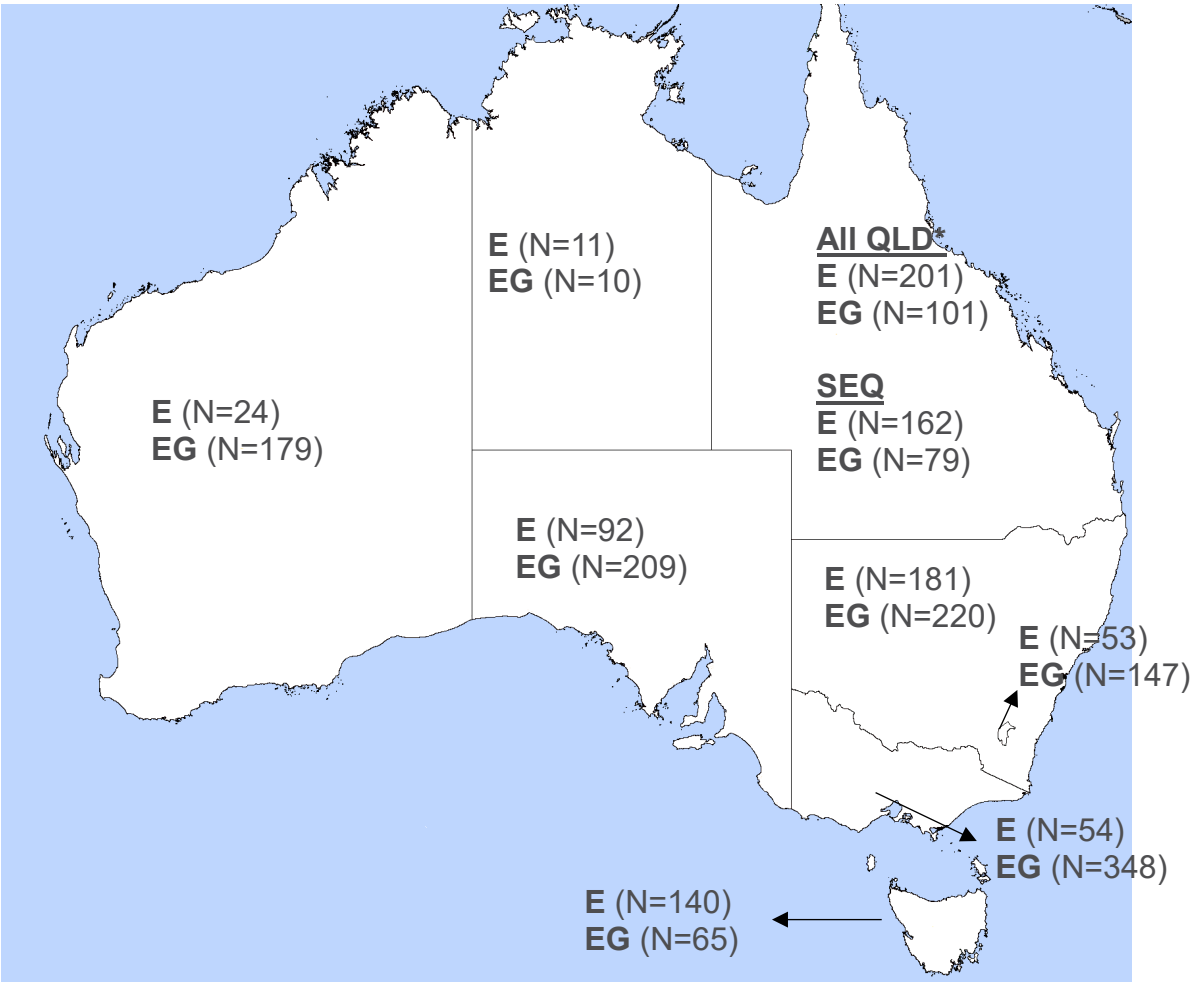
Samples by energy types



KEY
E Only electricity
EG Electricity and gas

Plus nationwide:

Businesses with less than 200 employees
E (N=123)
EG (N=163)
* 'All Qld' includes SEQ

Summary Findings

Summary of key findings

This is the sixth 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 fifth wave, reported in December 2017.

- We have previously 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 6) with results from Wave 4 (taken from approximately the same time last year).

Comparing Wave 4 and Wave 6 shows a broad, and sometimes large, increase in satisfaction and confidence regarding the energy market across most states and territories.

- Overall satisfaction with the provision of electricity and gas services among households has either increased or held steady in all markets. Satisfaction has increased by as much as 17% in South Australia (potentially reflecting a rebound from the low level of satisfaction following the 2016 blackouts), though most other markets saw more modest increases of between 2% and 8%. The only market where satisfaction did not increase was Tasmania, where it remained on 59%.
- Overall satisfaction in Queensland has now increased for four consecutive surveys, and Queensland appears to be the exception to the general trend of satisfaction being lower in the 'winter' surveys than in the 'summer' surveys. This is likely a reflection of the warmer climate in Queensland.
- Similarly, satisfaction with value for money has increased for both electricity and gas across all markets. In terms of electricity, satisfaction increased by as much as 16% in Queensland. Change in this sentiment was smallest in Tasmania, where it rose by 2% to 37%.
- In terms of value for money for gas, there were similarly large increases in satisfaction in Queensland (up 18%) and South Australia (up 16%) and among small business consumers (up 10%). Satisfaction on this measure rose by at least 6% in all markets.
- Satisfaction with the reliability of electricity is up across all markets, with increases as high as 16% in South Australia (again a likely outcome of the 2016 blackout), and 9% in the ACT and Queensland. The only decreases on this measure were in Tasmania (down 3%) and Victoria (down 2%). However, overall satisfaction with reliability remains high, with at least 64% in all markets satisfied.

- Satisfaction with the level of competition in the energy market has increased sharply in several markets, with increases of 19% in Queensland (and 22% in South East Queensland), and 14% in Western Australia, South Australia and ACT. Satisfaction on this measure continues to be much lower in Tasmania (7% satisfied) and ACT (31%) than in other markets (between 47% and 61% satisfied), reflecting the lack of retail competition in these markets.

Consumer confidence has also increased across most measures and most markets

- There were increases in consumer confidence across all measures and markets except Tasmania, where confidence tended to either fall slightly or remain unchanged. Consumer confidence in their own ability to make choices about energy increased by between 5% (ACT) and 14% (SE QLD), confidence in the availability of easily understood information increased by between 2% (ACT) and 13% (WA), and confidence that the market is working in consumers' long-term interests increased by between 4% (ACT) and 16% (QLD).
- Despite the increase in confidence that the market is working in consumers' overall interests, confidence levels remain low on this measure among households, ranging from 36% (WA and SE QLD) to 15% (ACT). Small business consumers are more confident on this measure, with 46% expressing confidence.

Most consumers have acted to lower their energy use through their behaviours, but few have done so through new technologies.

- Most consumers are active in managing their energy costs, predominantly through simple behaviours such as switching off lighting and appliances when they're not in use and using appliances less frequently or more efficiently.

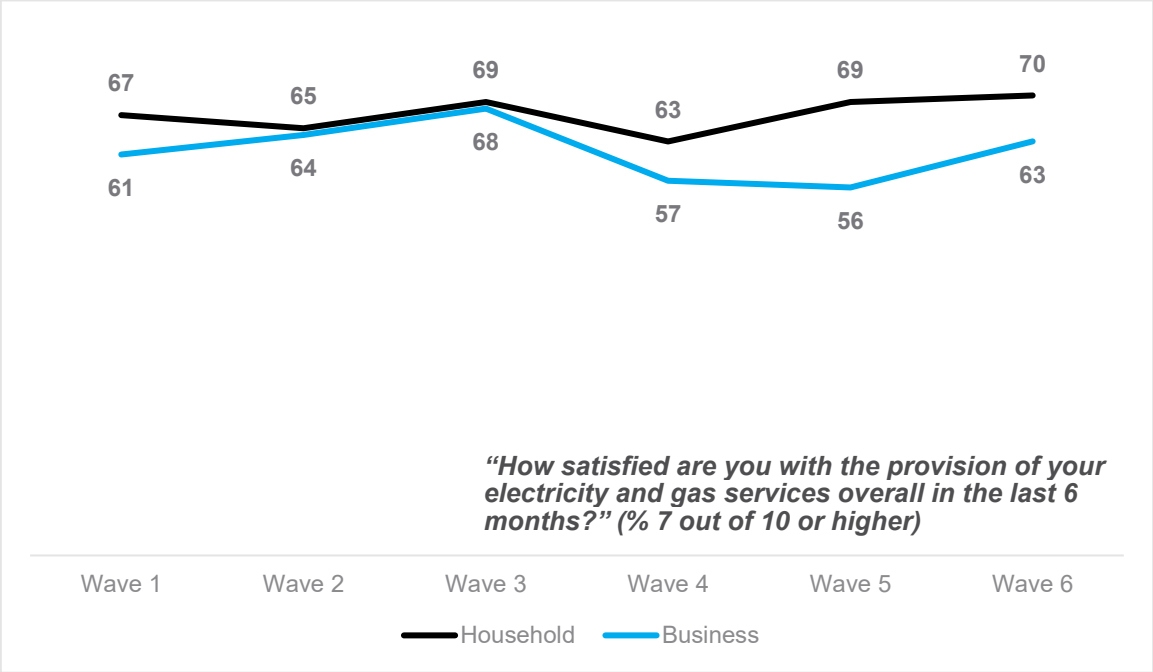
Trends

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=1969.

For household consumers, an overall satisfaction of 70% is the highest recorded across the six waves of the survey (with 69% satisfaction being recorded in waves 3 and 5). To some extent, this result breaks the trend of satisfaction decreasing for the end of winter surveys (waves 2, 4 and 6).

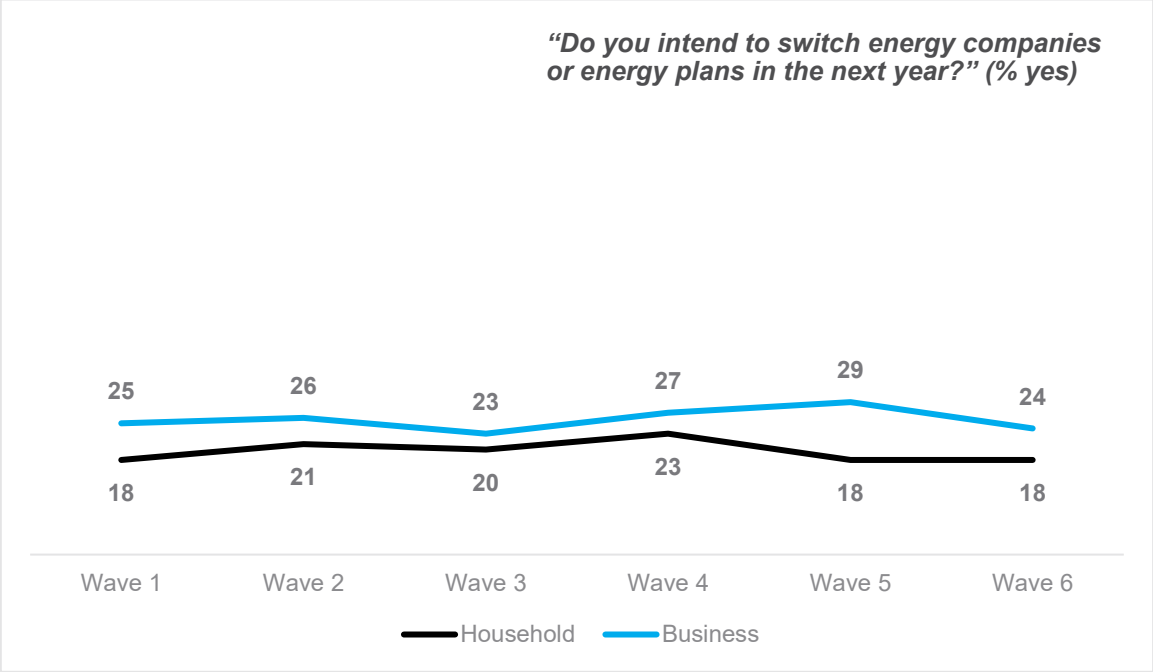
Satisfaction has also risen for small business consumers, rebounding from the lower levels of satisfaction recorded in waves 4 and 5).



Switching

Small businesses continue to report a greater intention to switch than household consumers, as they have done for each of the six waves. Intention to switch among small businesses has decreased from a historic high in wave 5, to the second lowest level recorded.

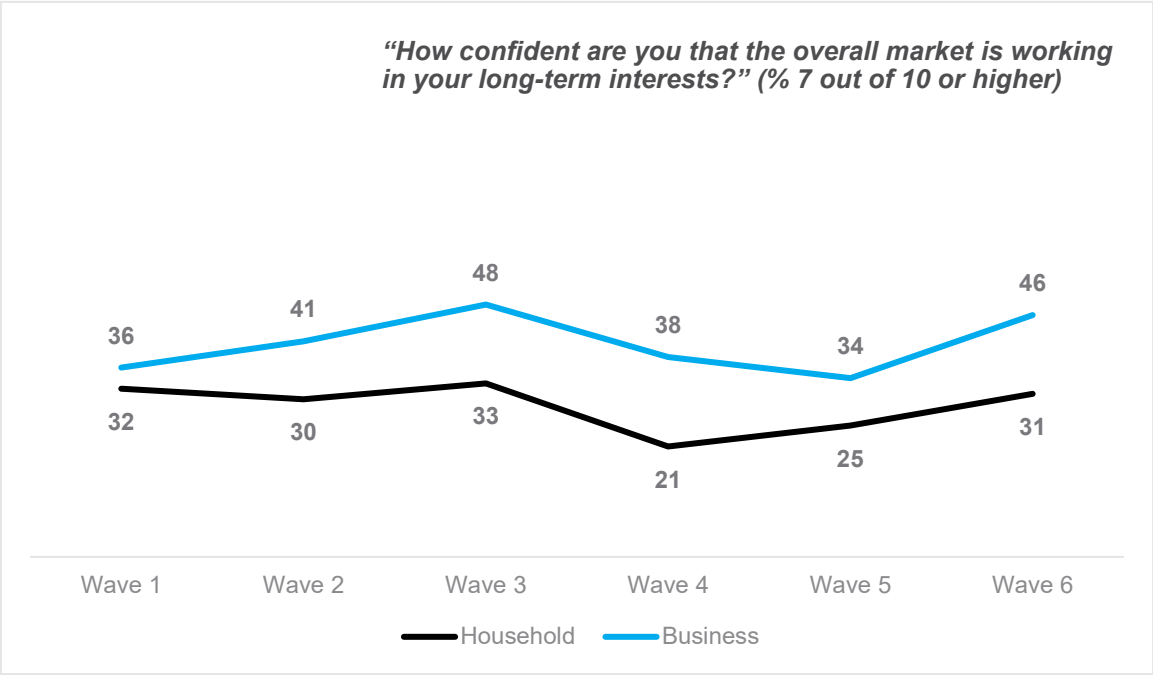
For household consumers, there has been no shift in intention to switch from wave 5, with 18% saying that they intend to switch in the next 12 months. This is the equal lowest level of switching intention recorded, having also been recorded in waves 1 and 5.



Long-term interests

Confidence that the energy market is working in the long-term interests of consumers has increased for both household and small business consumers, with confidence appearing to rebound from the low levels recorded in waves 4 and 5.

Confidence continues to be higher among small businesses than it is among households.



National findings

Satisfaction

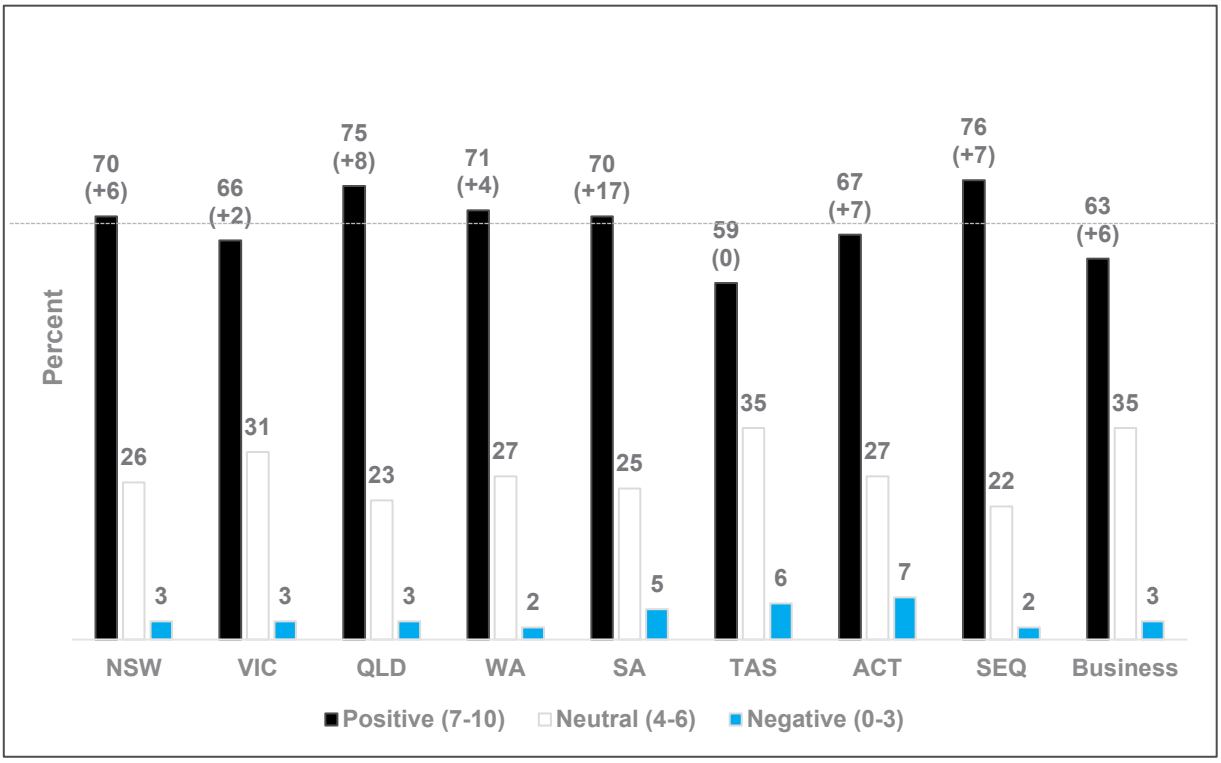
Overall satisfaction

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

- The largest increases were in South Australia (up 17% to 70%) and in Queensland (up 8% to 75%).
- Satisfaction among small business consumers increased by 6% to 63%.

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

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



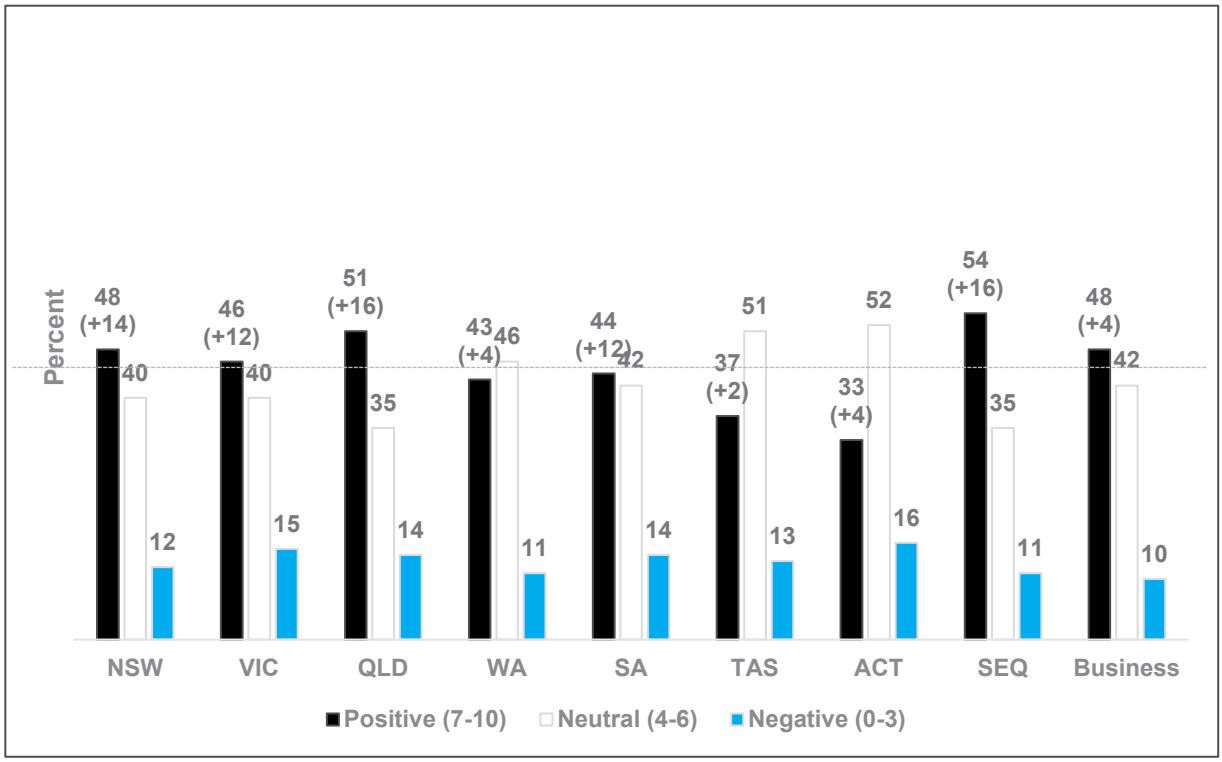
Overall value for money (Electricity)

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

There were double digit increases in satisfaction in:

- Queensland (up 16% to 51% overall, and up 16% to 54% in South East Queensland)
- New South Wales (up 14% to 48%)
- Victoria (up 12% to 46%)
- South Australia (up 12% to 44%)

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'



Average positive rating

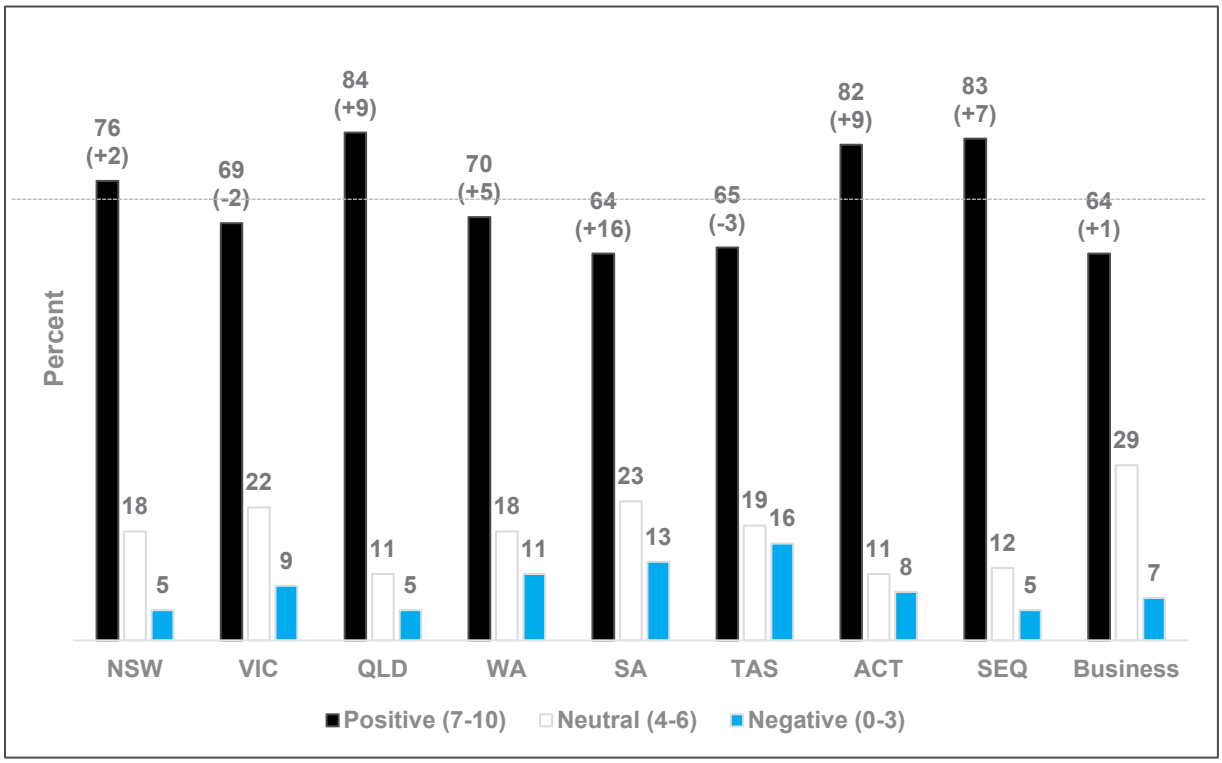
Reliability (Electricity)

Satisfaction with the reliability of electricity is up in most states and territories, though there were modest decreases in Tasmanian and Victoria.

- By far the largest increase in satisfaction was in South Australia (up 16% to 64%), which is likely a product of time passed since the 2016 blackout.
- There were also sizeable increases in satisfaction in Queensland (up 9% to 84% and the ACT (up 9% to 82%).

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'



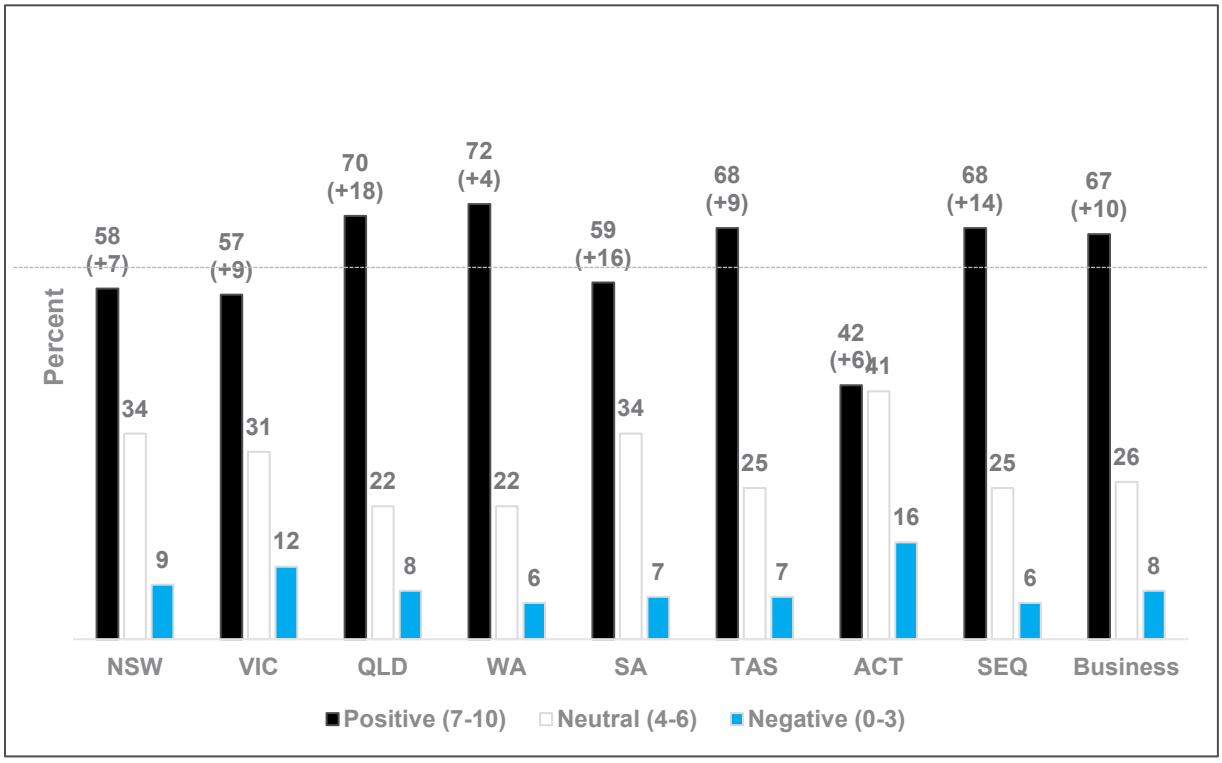
Overall value for money (Gas)

Satisfaction with value for money of gas is up in all markets.

- The largest increases are in Queensland (up 18% to 70% overall and up 14% to 68% in South East Queensland), in South Australia (up 16% to 59%), and among small businesses (up 10% to 67%).
- While satisfaction has increased by 6% to 42% in the ACT, the figure remains much lower than other states and territories.

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'



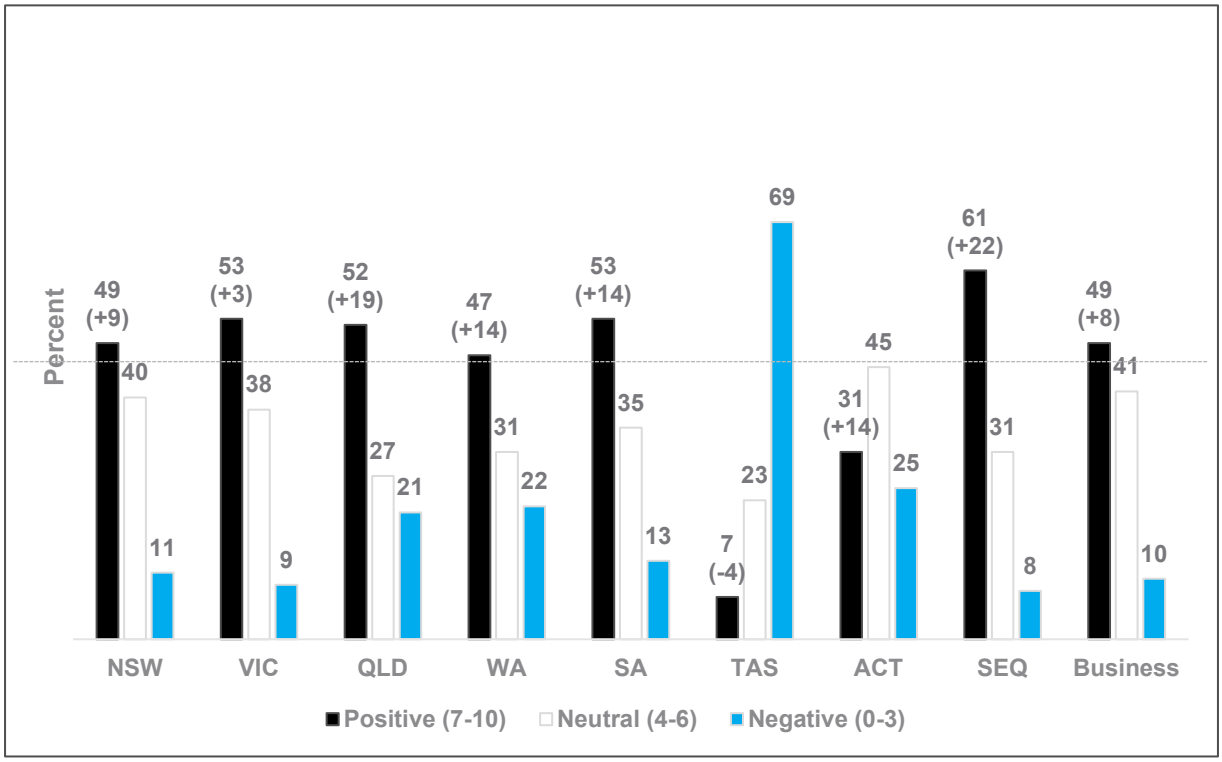
Note: Small sample size for Tasmania (n=56) and SE Queensland (n=79).

Level of competition

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

- There were large increases in satisfaction most markets, including Queensland (up 19% to 52% overall, and up 22% to 61% in South East Queensland), South Australia (up 14% to 53%), Western Australia (up 14% to 47%), and the ACT (up 14% to 31%).
- Tasmania (where there is limited choice of energy retailer) was the only market where satisfaction declined, down by 4% to 7%.

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='verv satisfied'

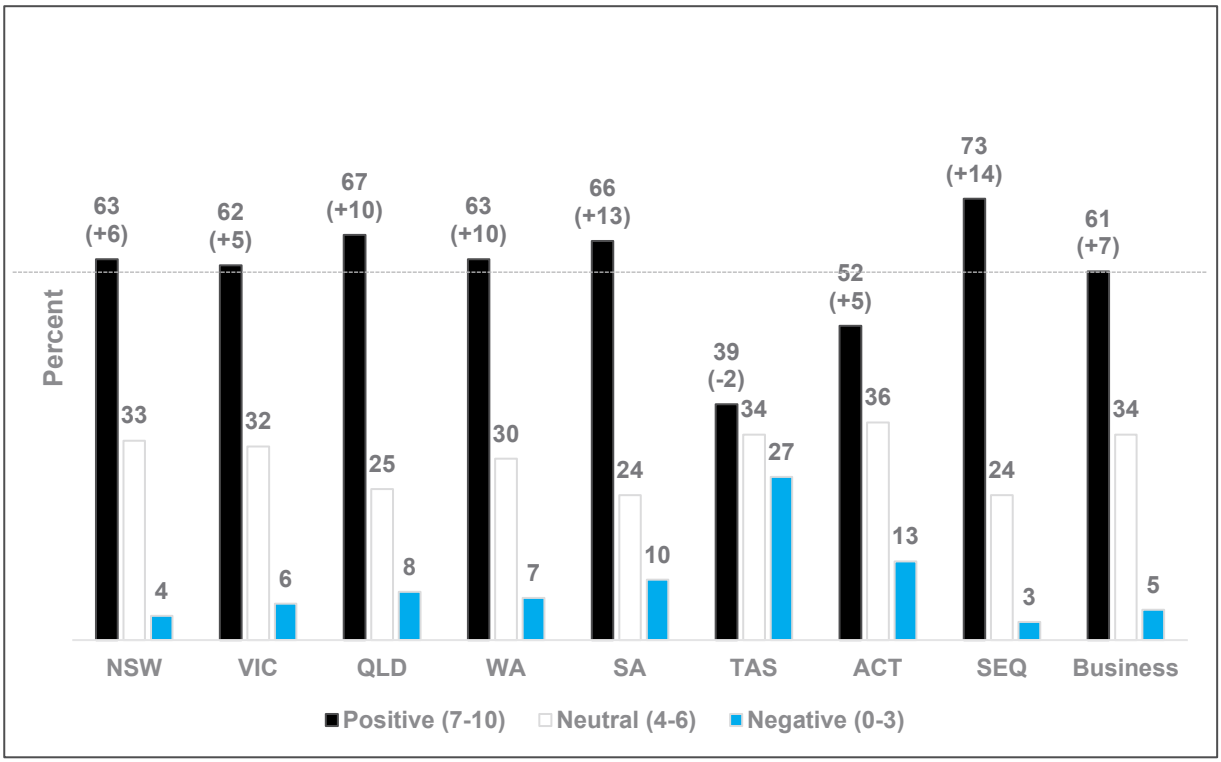


Consumer confidence in their abilities

Consumers' confidence in their own ability to make choices about the energy market is up in most markets.

- The largest shifts were in Queensland (up 10% to 67% overall, and up 14% to 73% in South East Queensland), South Australia (up 13% to 66%), and Western Australia (up 10% to 63%).

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'



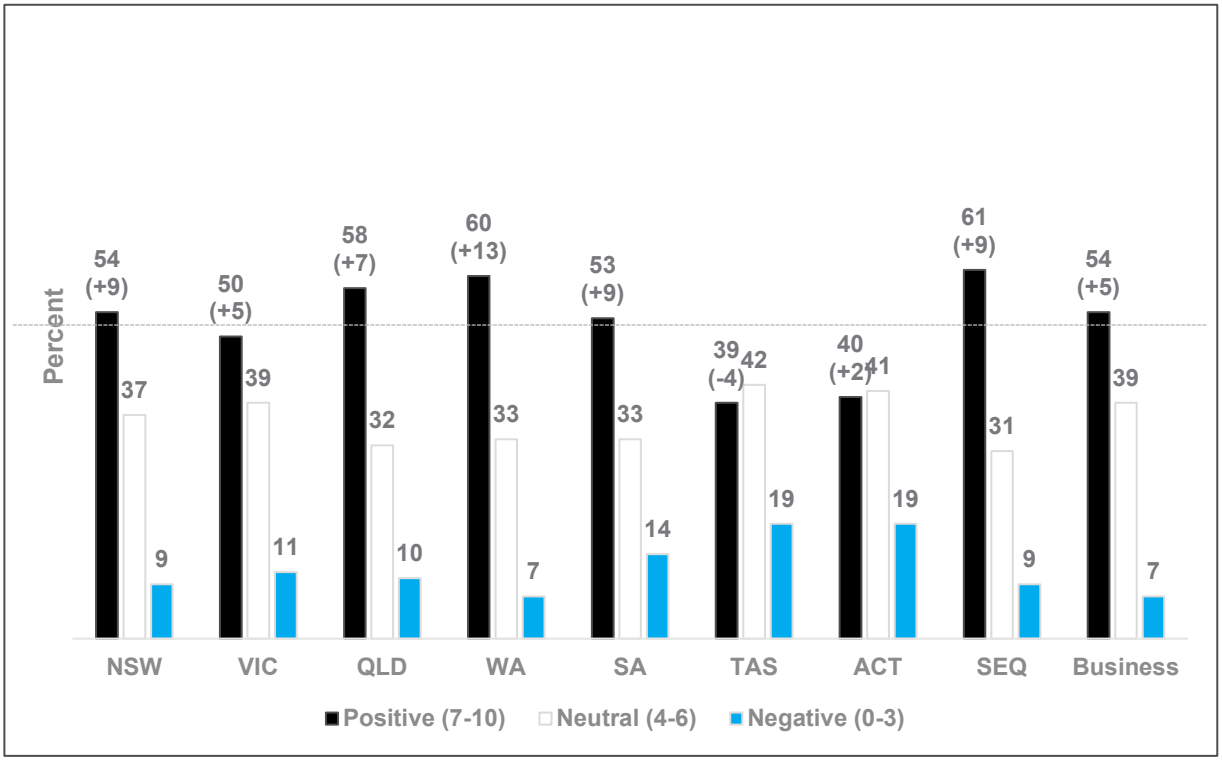
Confidence

Confidence in the availability of information

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

- The largest increases were in Western Australia (up 13% to 60%), South East Queensland (up 9% to 61%) and New South Wales (up 9% to 54%).
- Confidence in the availability of information continues to be substantially lower in Tasmania and the ACT than in other states.

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



Average positive rating

Confidence in the market

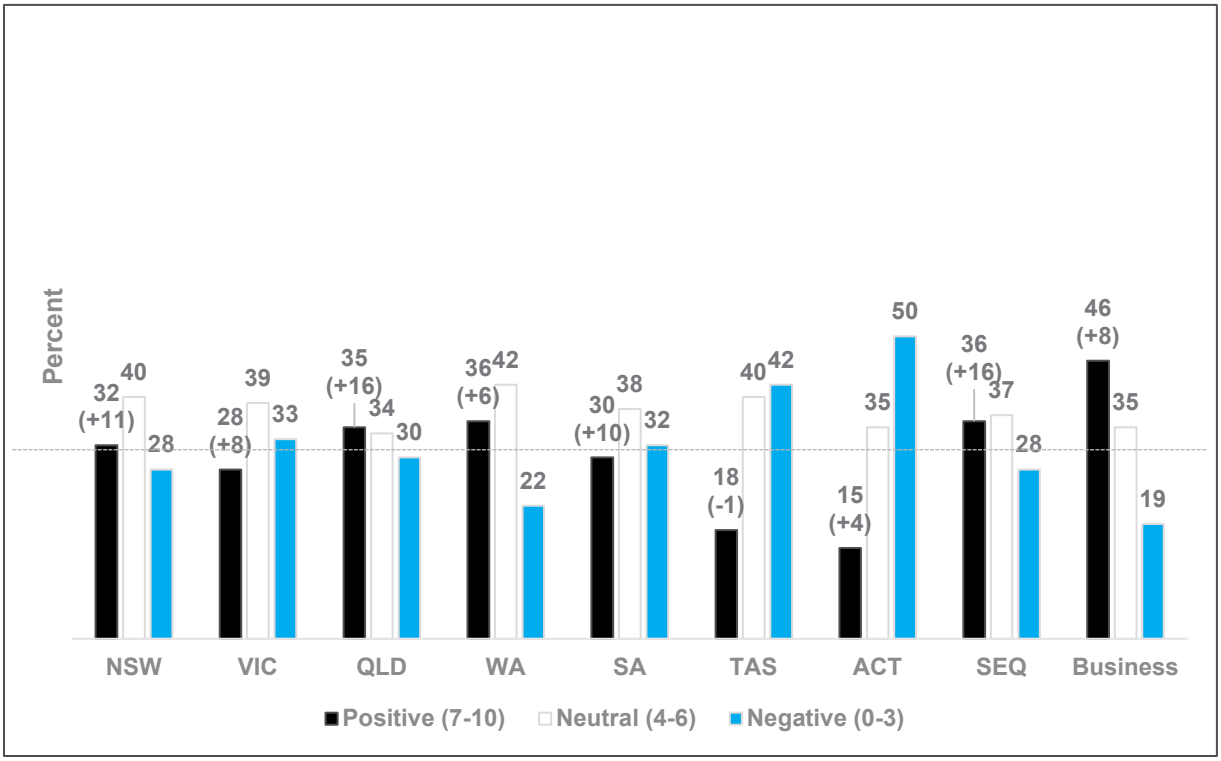
Consumer confidence that the energy market is working in their long-term interest has increased in most markets. However, most consumers in all markets continue to provide a neutral or negative response on this question.

There were double-digit increases in the following markets:

- Queensland and South East Queensland (up 16% to 35% overall).
- New South Wales (up 11% to 32%).
- South Australia (up 10% to 30%).

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'



Average positive rating

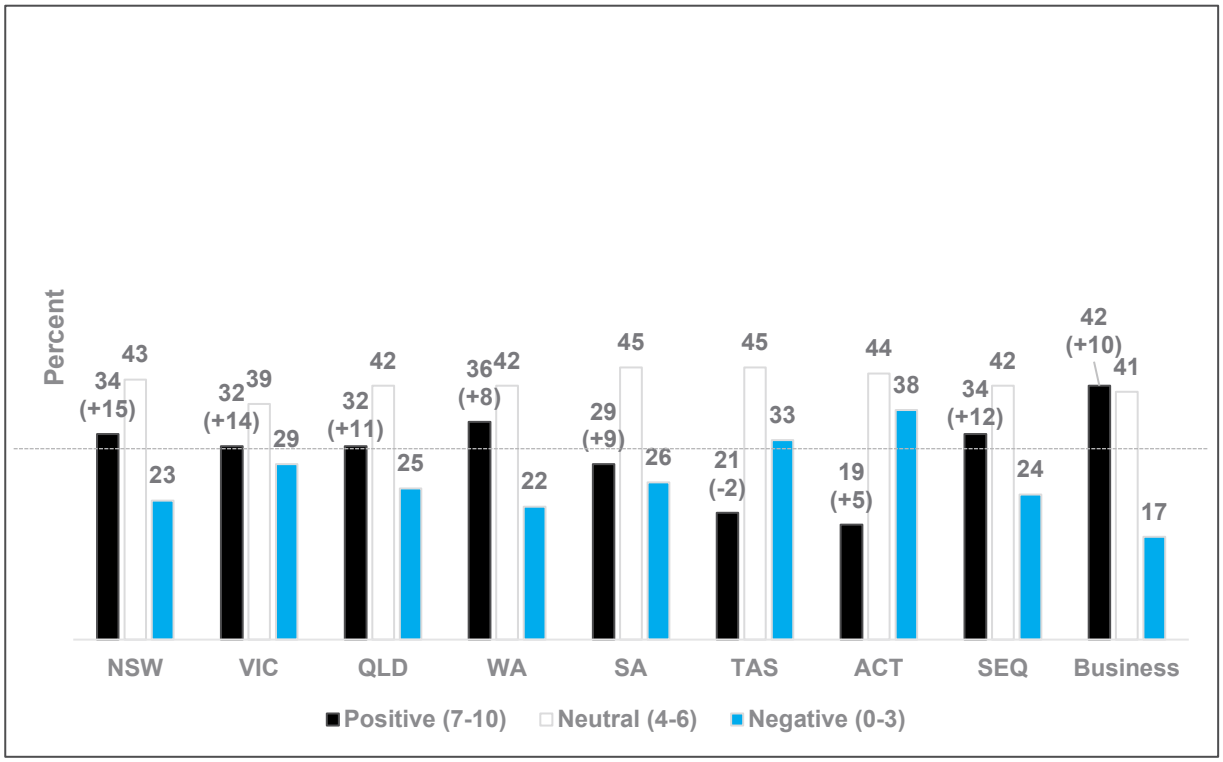
Confidence in the future value for money

Confidence in future value for money has increased in most markets but remains low overall.

- Increases were largest in New South Wales (up 15% to 34%), Victoria (up 14% to 32%), and Queensland (up 11% to 32% overall, and up 12% to 34% in South East Queensland).
- Confidence has increased by 10% to 42% among small businesses.

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'



Average positive rating

Confidence in future reliability

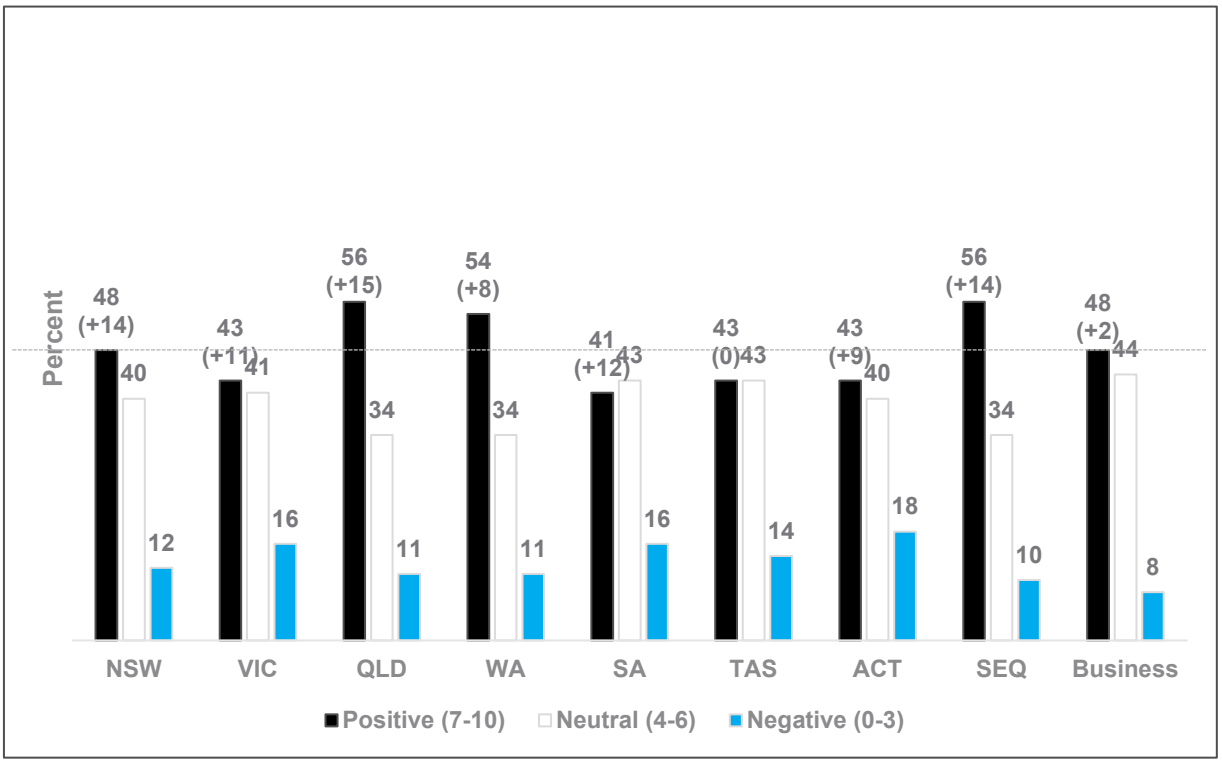
The proportion of consumers expressing confidence that the market will deliver increased reliability has increased in most markets.

There were double-digit increases in confidence in the following markets:

- Queensland (up 15% to 56% overall, and up 14% to 56% in South East Queensland).
- New South Wales (up 14% to 48%).
- South Australia (up 12% to 41%).
- Victoria (up 11% 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'



Average positive rating

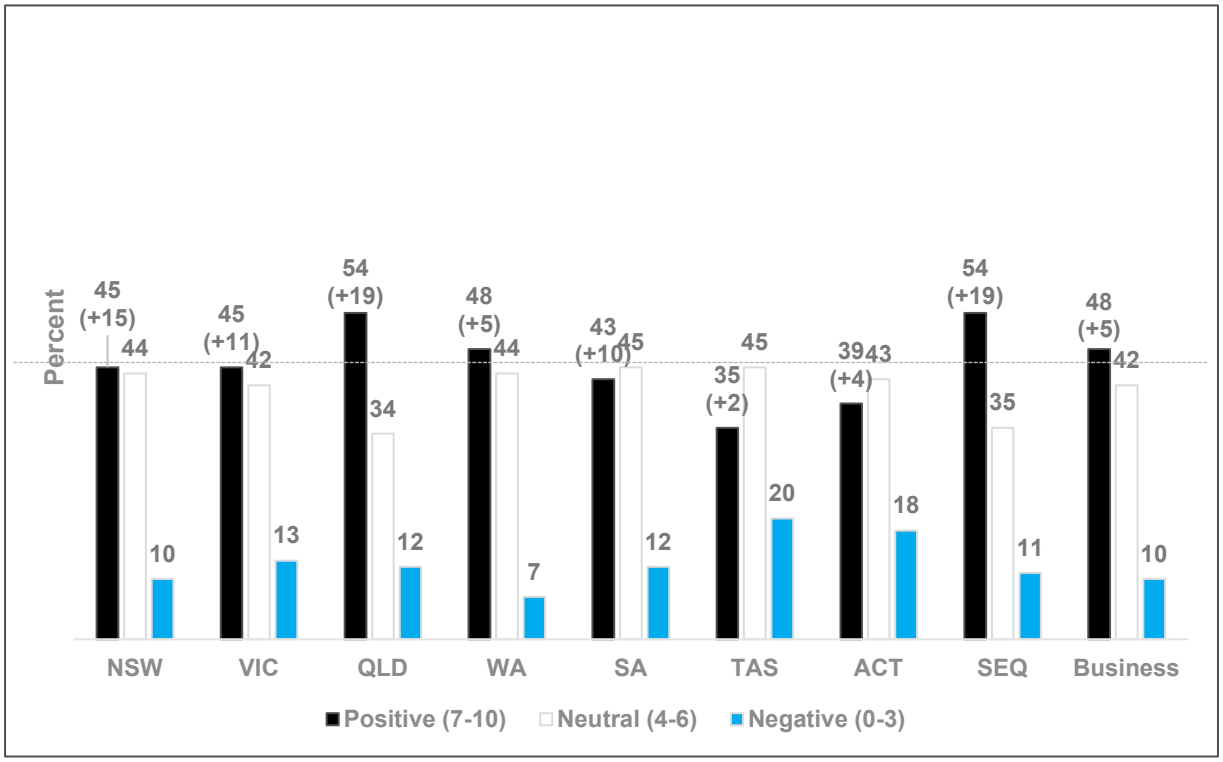
Confidence in future technology

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

- Increases were largest in Queensland (up 19% to 54%), New South Wales (up 15% to 45%), Victoria (Up 11% to 45%) and South Australia (up 10% to 43%).
- Increases were comparatively smaller in Tasmania (up 2% to 35%) and the ACT (up 4% to 39%).

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'



Average positive rating

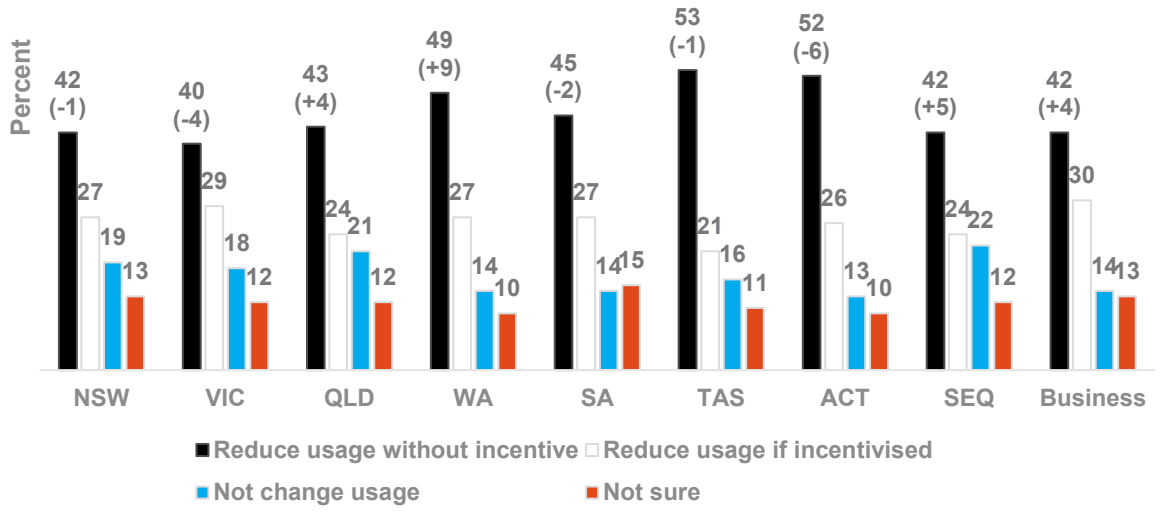
Activity

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 be willing to reduce their energy usage in periods of high demand and most of these say they would do so without requiring 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?



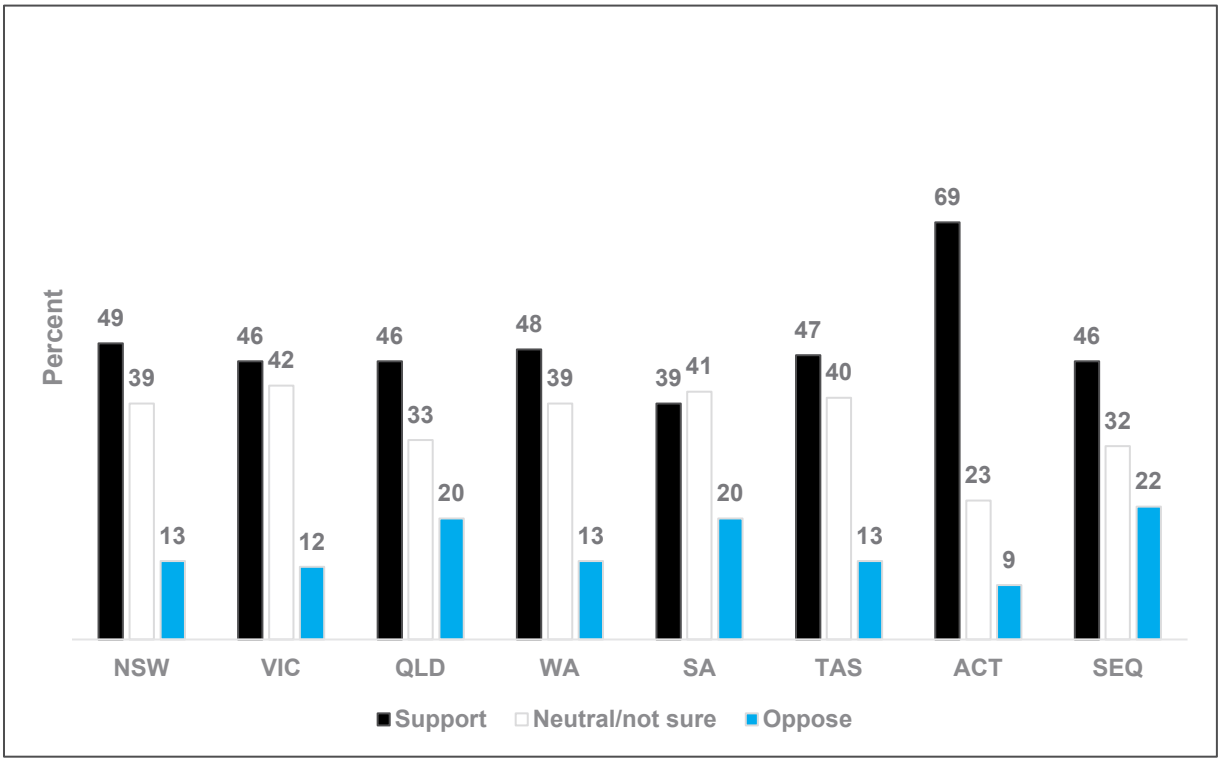
Activity

Mandatory labelling schemes

There is some support for a mandatory labelling scheme for energy efficiency ratings of houses.

- Support was by far the highest in the ACT, where 69% said they supported the idea.
- In other markets, support ranged from a low of 39% (SA) to 49% (NSW)

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



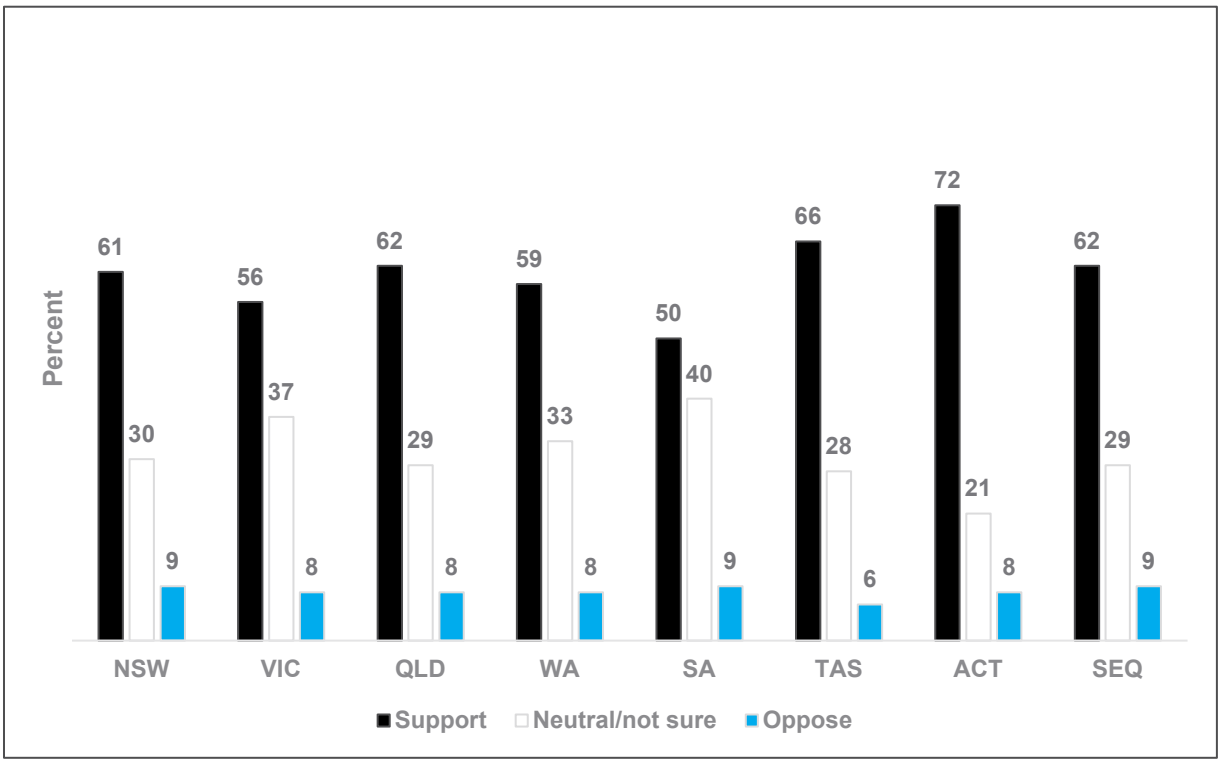
Activity

Minimum efficiency standards

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

- Support for the initiative is highest in ACT (72% support) and Tasmania (66%), and lowest in South Australia (50%).
- Of those who do not support the initiative, most are neutral or unsure – less than 10% in each market oppose the measure.

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

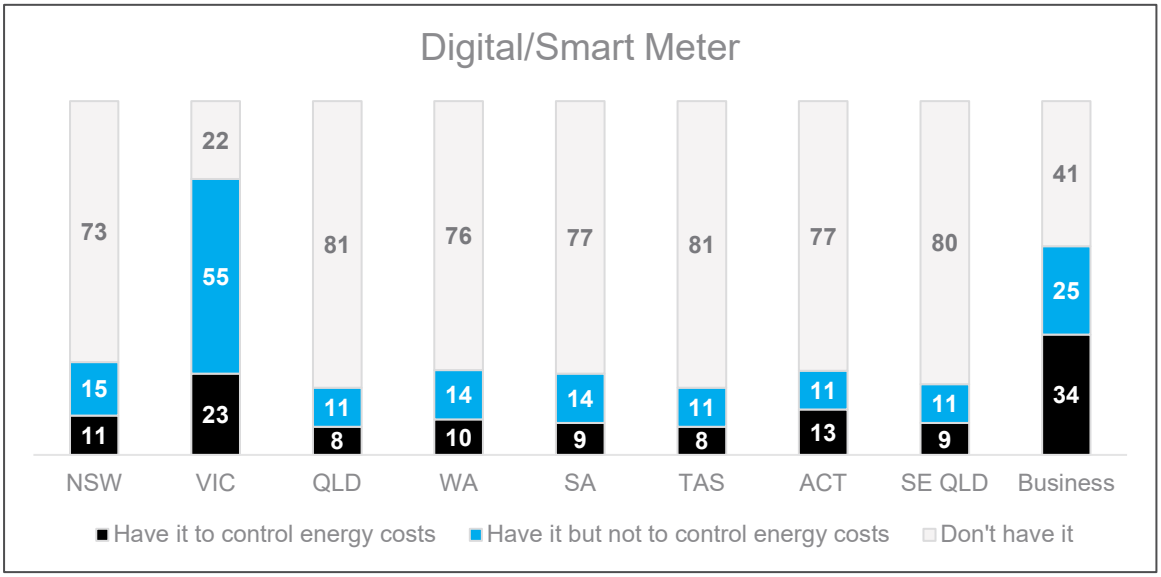


Technology to control energy costs

Except for 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 78% say they have one, though only 23% say that they use it to control energy costs.
- Smart thermostats are most common among small business - 42% have one, and 24% of small businesses use the technology to control energy costs.
- 38% of small business users say they have an energy management system (26% have one to control costs) while among household consumers, less than 10% of all markets say they have one.

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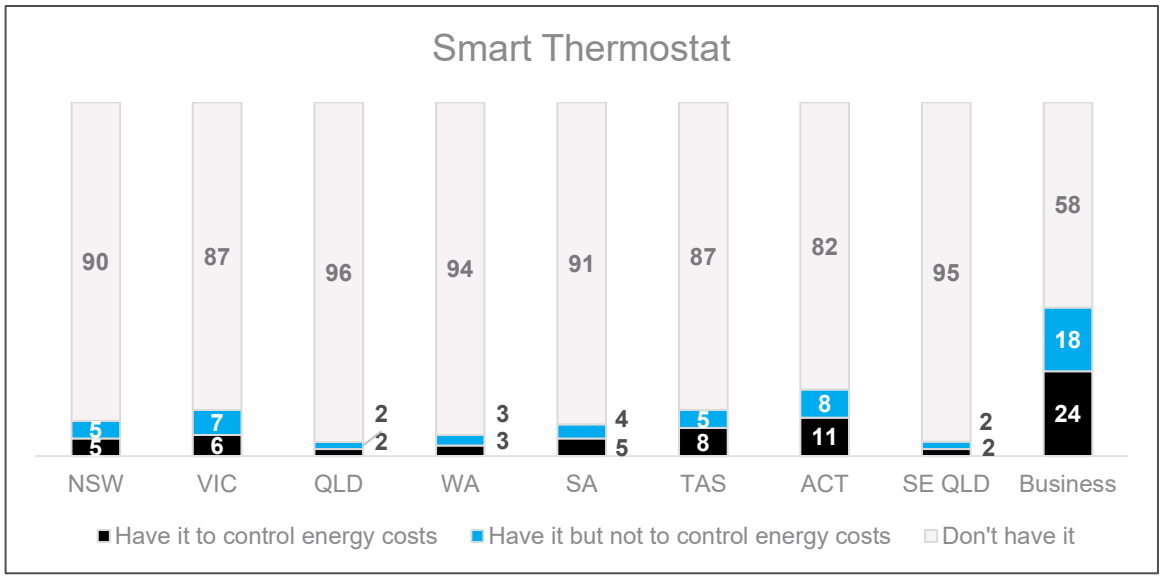
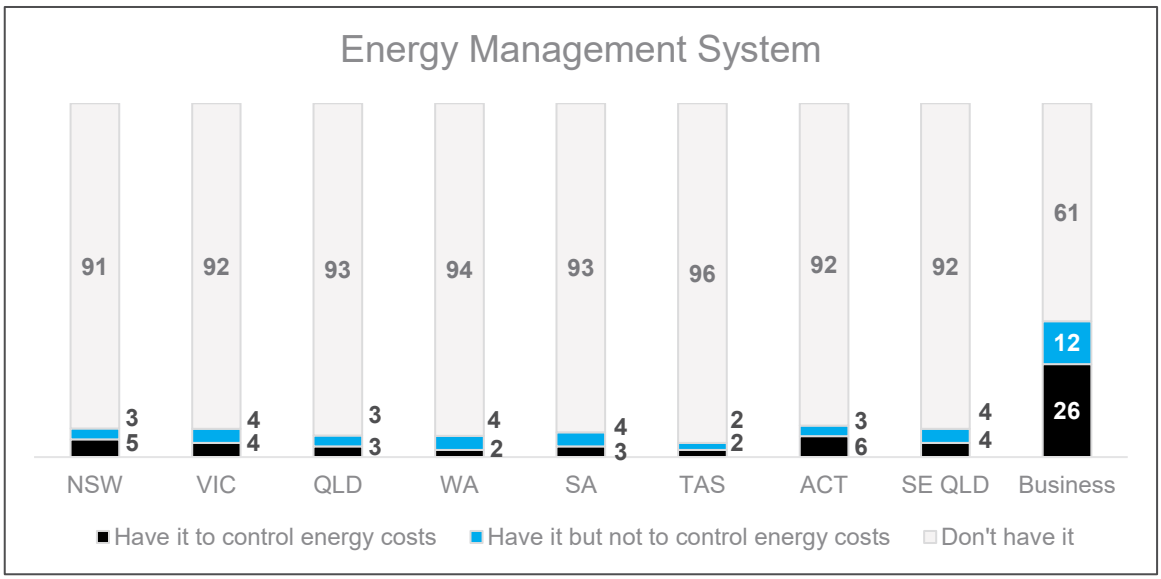
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs?



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, smart thermostats, electric vehicles or home energy management systems, in these technologies.

- Between 24% and 39% of consumers in each market are considering purchasing a battery storage system.
- Between 14% and 27% are considering rooftop solar panels.
- Between 13% and 22% are considering a home energy management system.
- Between 12% and 20% are considering a smart thermostat
- Between 9% and 21% are considering an electric vehicle

Across all household markets, of those who already have rooftop solar panels, 53% are considering purchasing a battery storage system. 6% are intending to do so in the next 12 months, and 47% are considering doing so in the longer term.

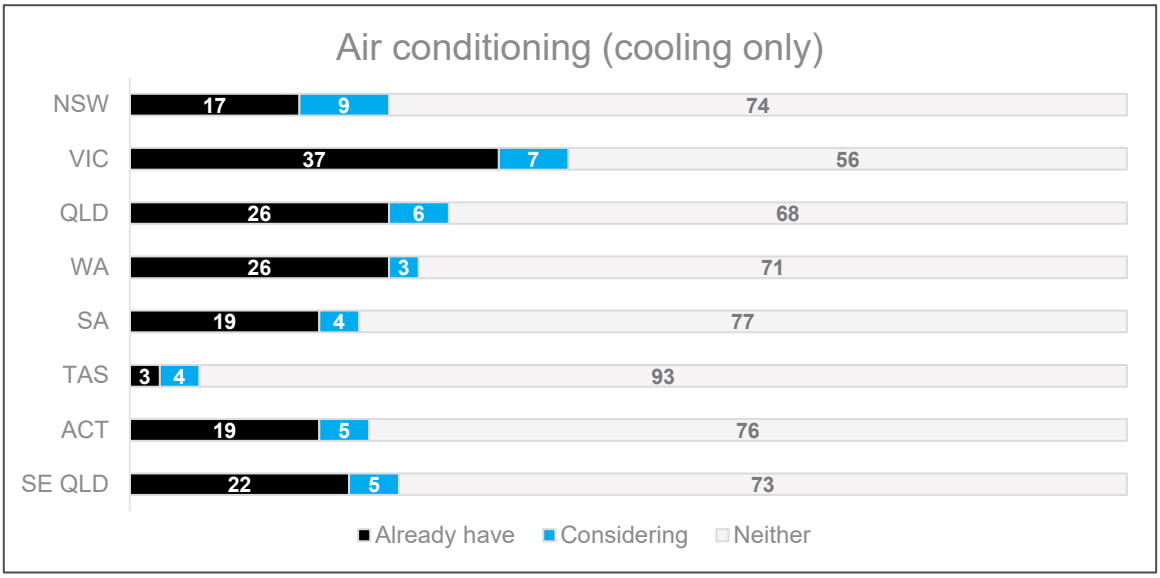
See following pages for charts

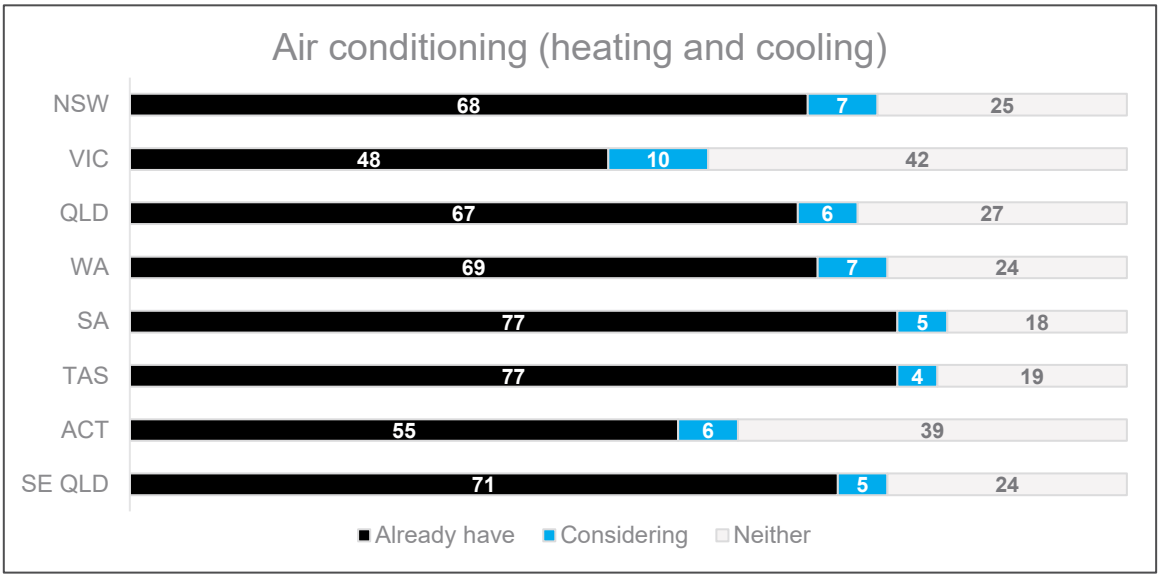
Activity

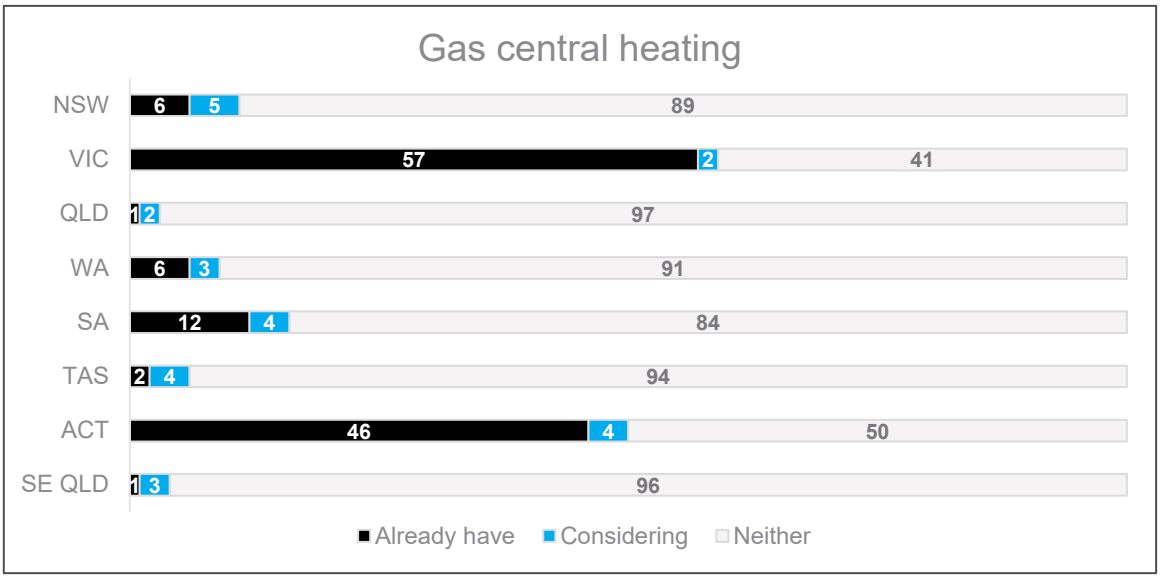
What investments are people considering

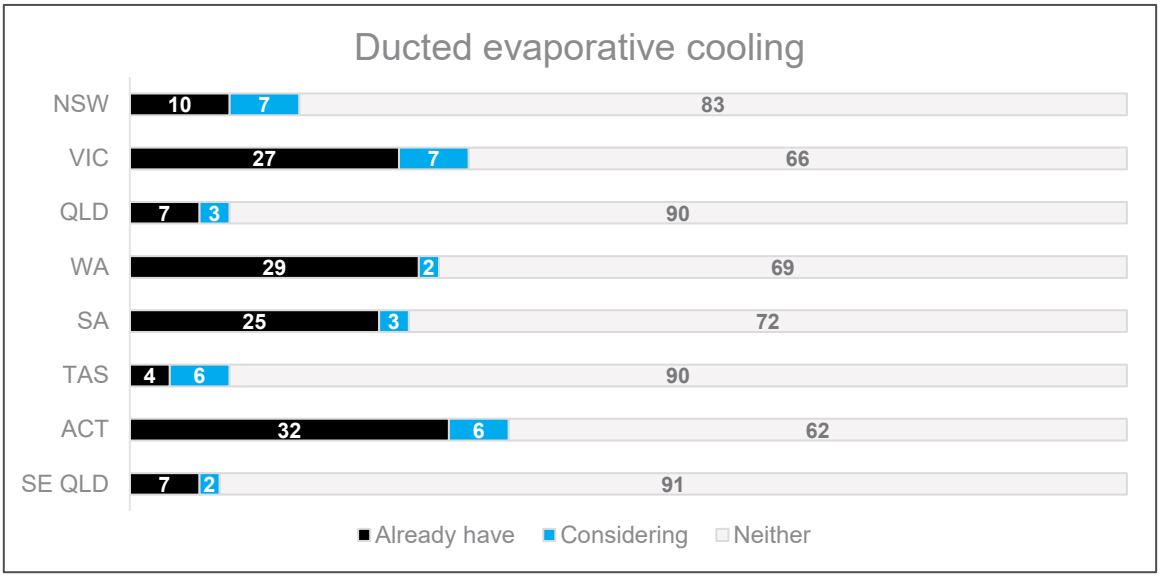
Which of the following technology do you have at your household? And which do you use to help control your energy costs?

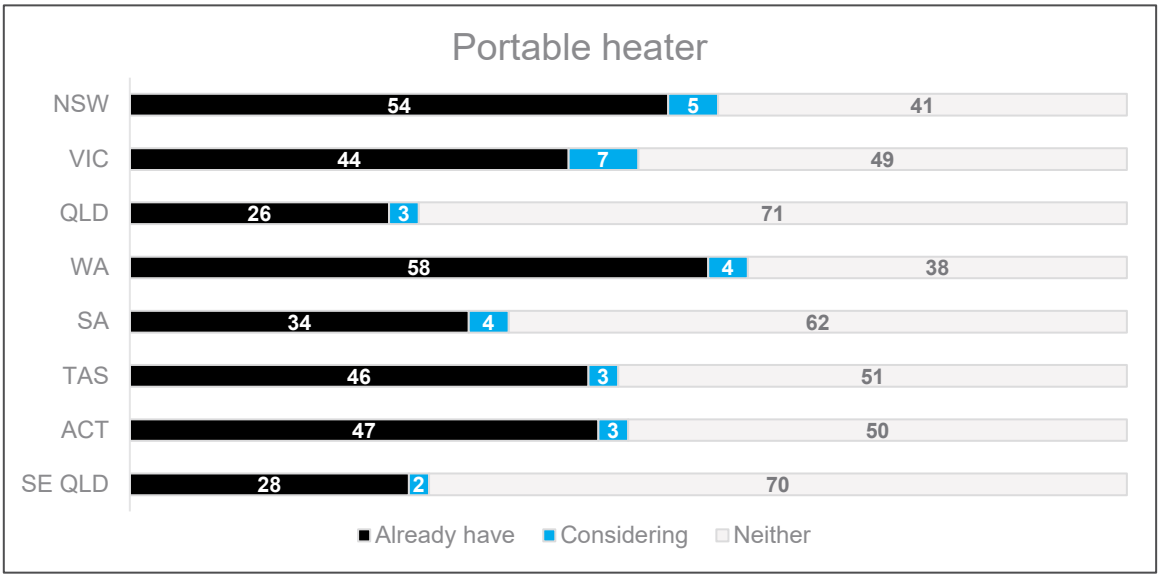
[If not] Which of the following are you intending to purchase for your home?

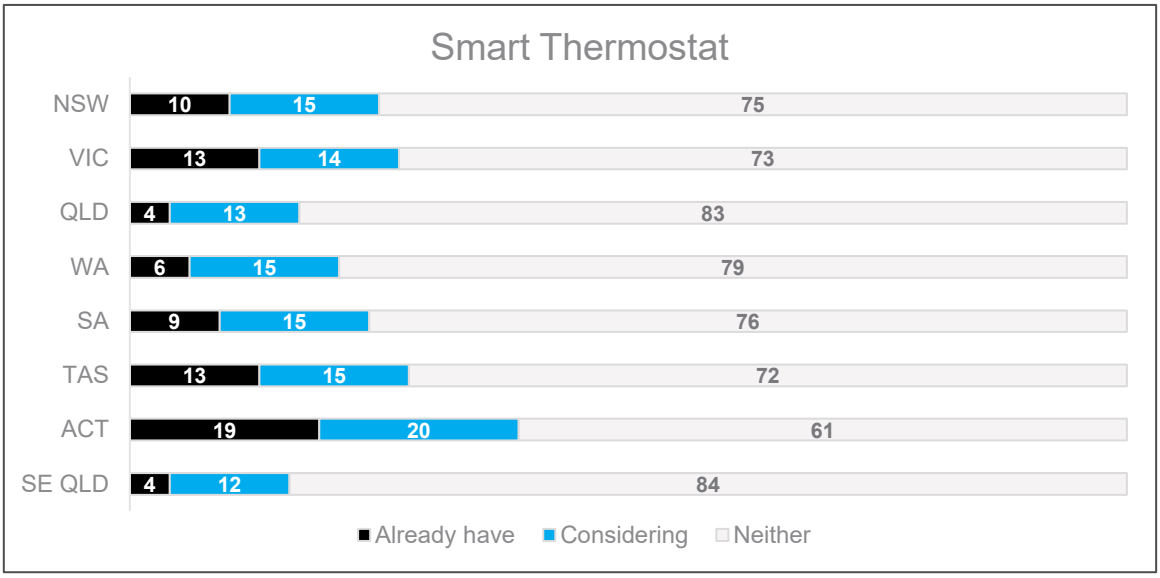


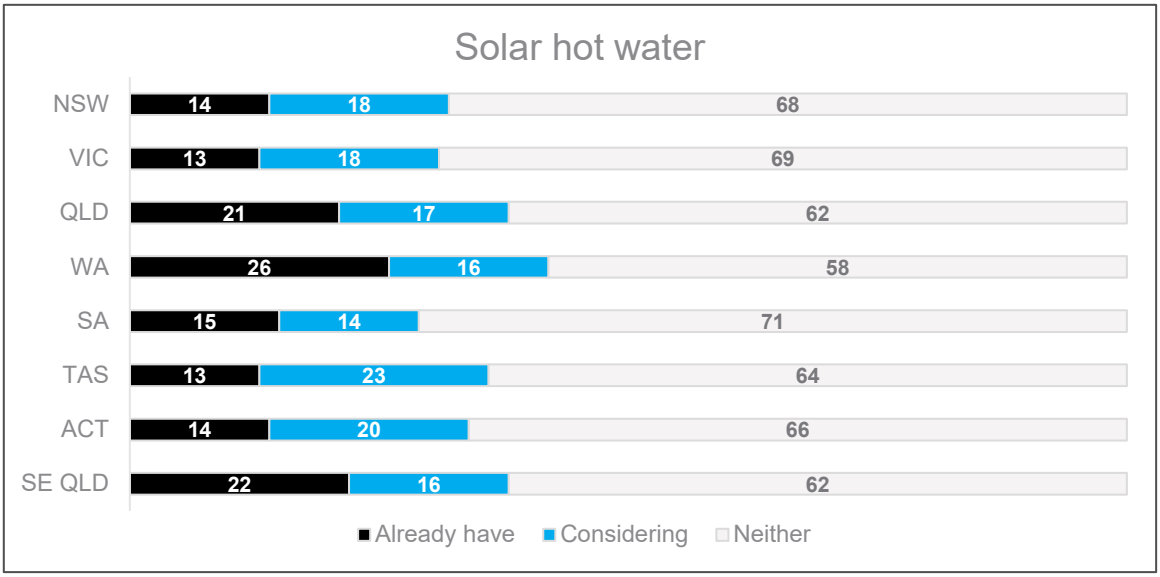


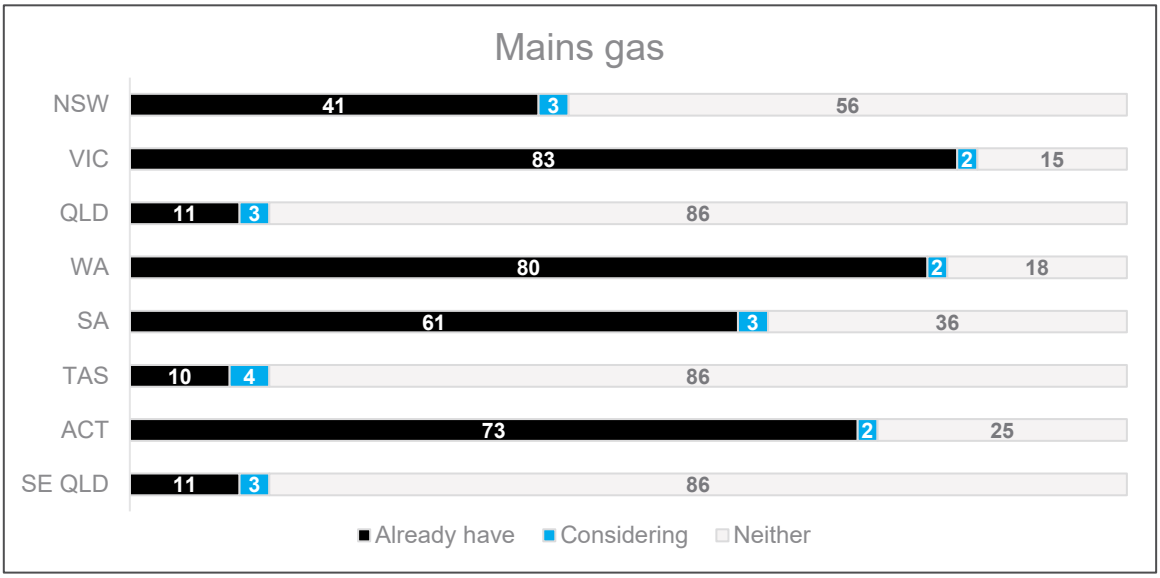

Gas central heating
NSW 6 5 89
VIC 57 2 41
QLD 1 2 97
WA 6 3 91
SA 12 4 84
TAS 2 4 94
ACT 46 4 50
SE QLD 1 3 96
Already have
Considering
Neither

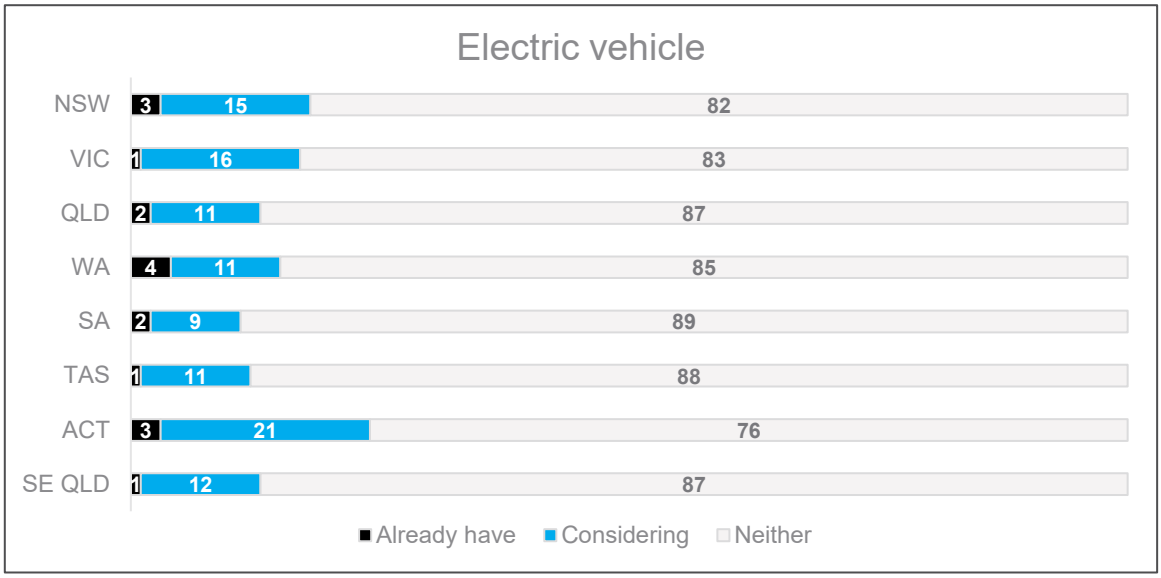

Ducted evaporative cooling
NSW 10 7 83
VIC 27 7 66
QLD 7 3 90
WA 29 2 69
SA 25 3 72
TAS 4 6 90
ACT 32 6 62
SE QLD 7 2 91
Already have
Considering
Neither

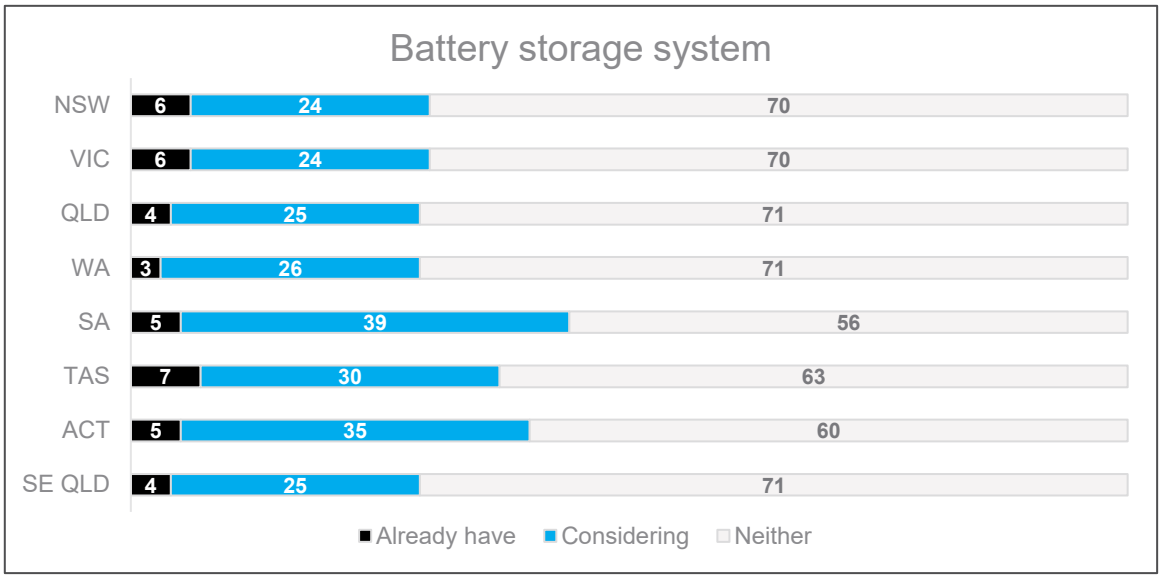

Portable heater
NSW 54 5 41
VIC 44 7 49
QLD 26 3 71
WA 58 4 38
SA 34 4 62
TAS 46 3 51
ACT 47 3 50
SE QLD 28 2 70
Already have
Considering
Neither

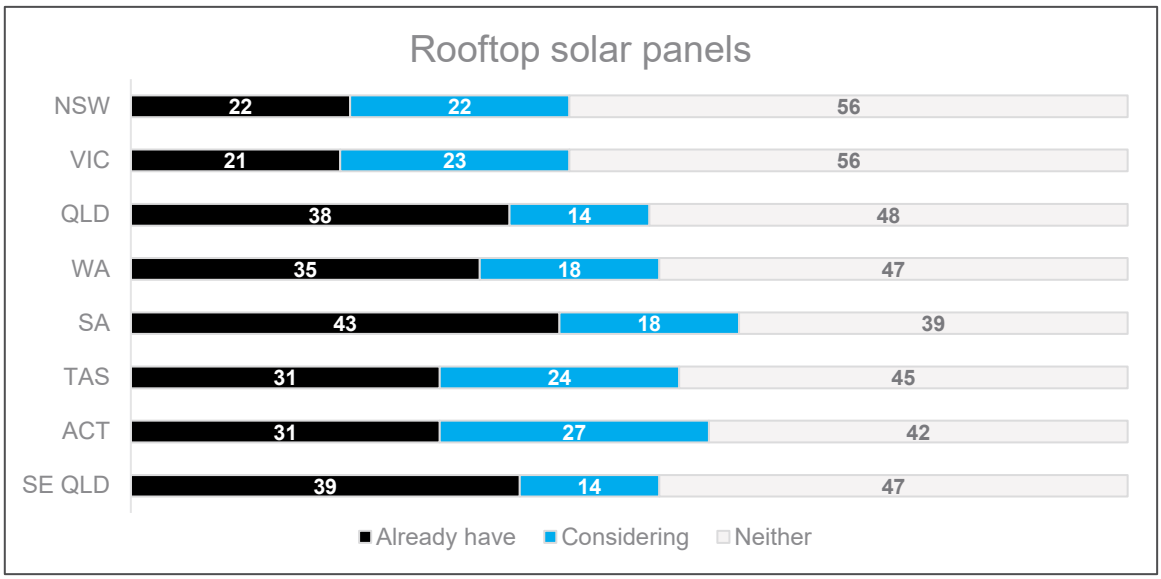

Smart Thermostat
NSW 10 15 75
VIC 13 14 73
QLD 4 13 83
WA 6 15 79
SA 9 15 76
TAS 13 15 72
ACT 19 20 61
SE QLD 4 12 84
Already have
Considering
Neither

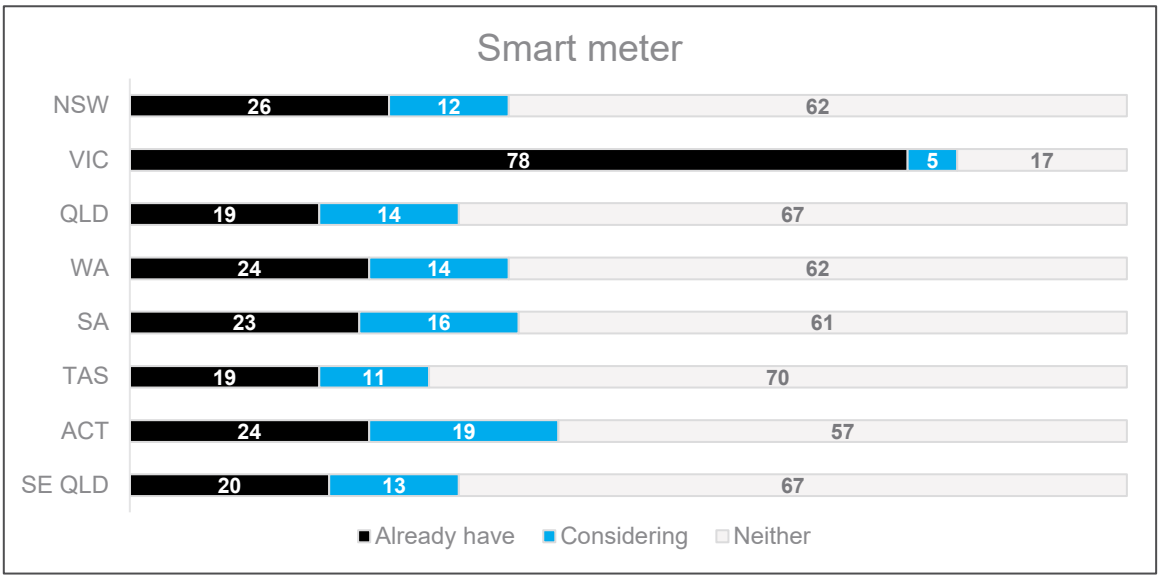

Solar hot water
NSW 14 18 68
VIC 13 18 69
QLD 21 17 62
WA 26 16 58
SA 15 14 71
TAS 13 23 64
ACT 14 20 66
SE QLD 22 16 62
Already have
Considering
Neither

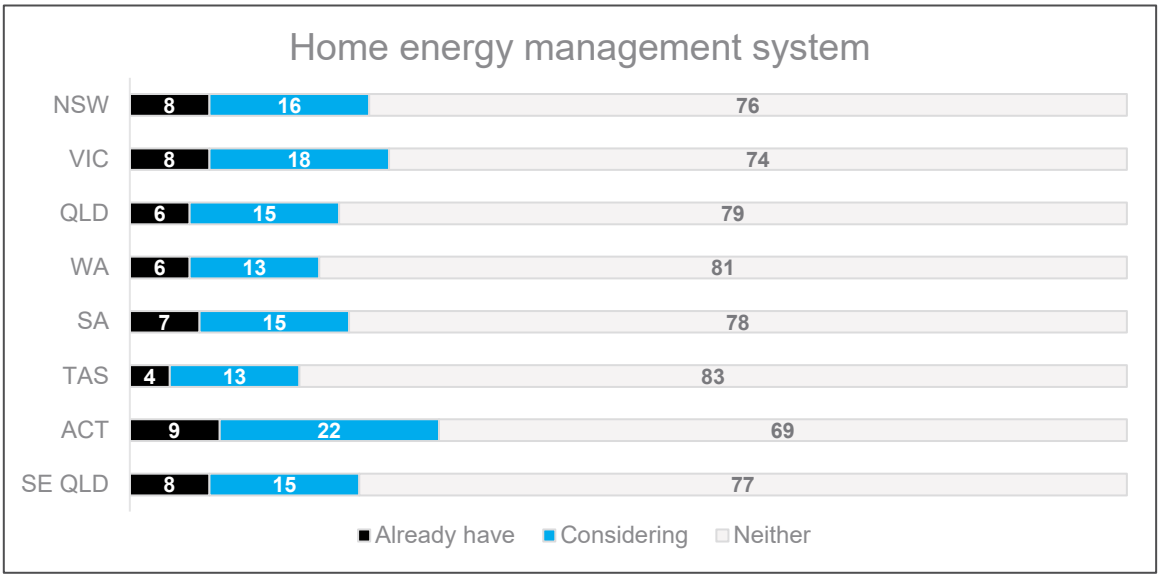

Mains gas
NSW 41 3 56
VIC 83 2 15
QLD 11 3 86
WA 80 2 18
SA 61 3 36
TAS 10 4 86
ACT 73 2 25
SE QLD 11 3 86
Already have
Considering
Neither

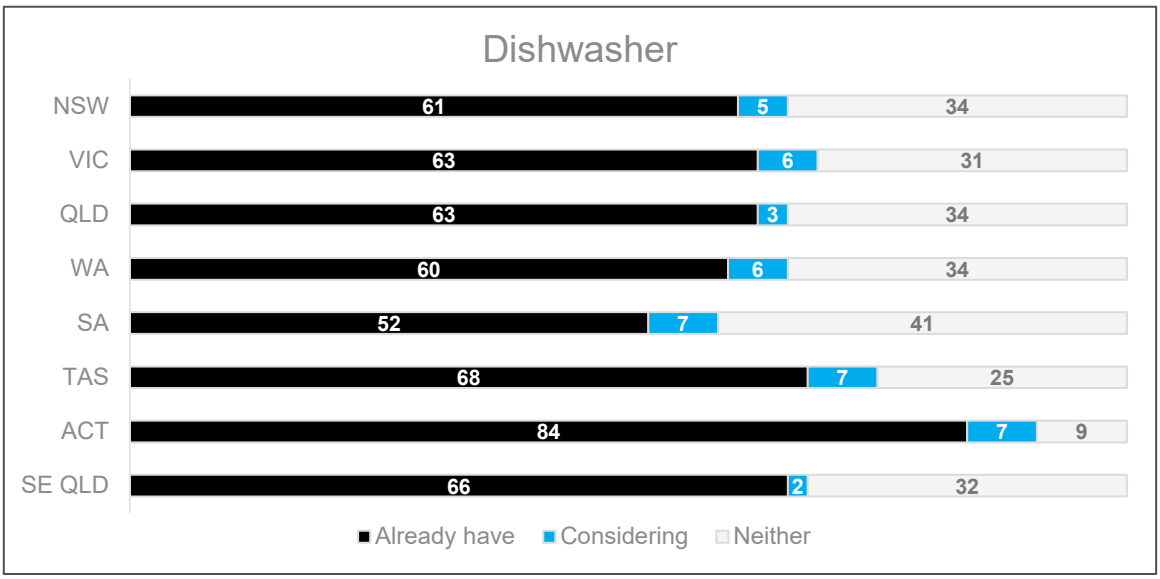

Electric vehicle
NSW 3 15 82
VIC 1 16 83
QLD 2 11 87
WA 4 11 85
SA 2 9 89
TAS 1 11 88
ACT 3 21 76
SE QLD 1 12 87
Already have
Considering
Neither

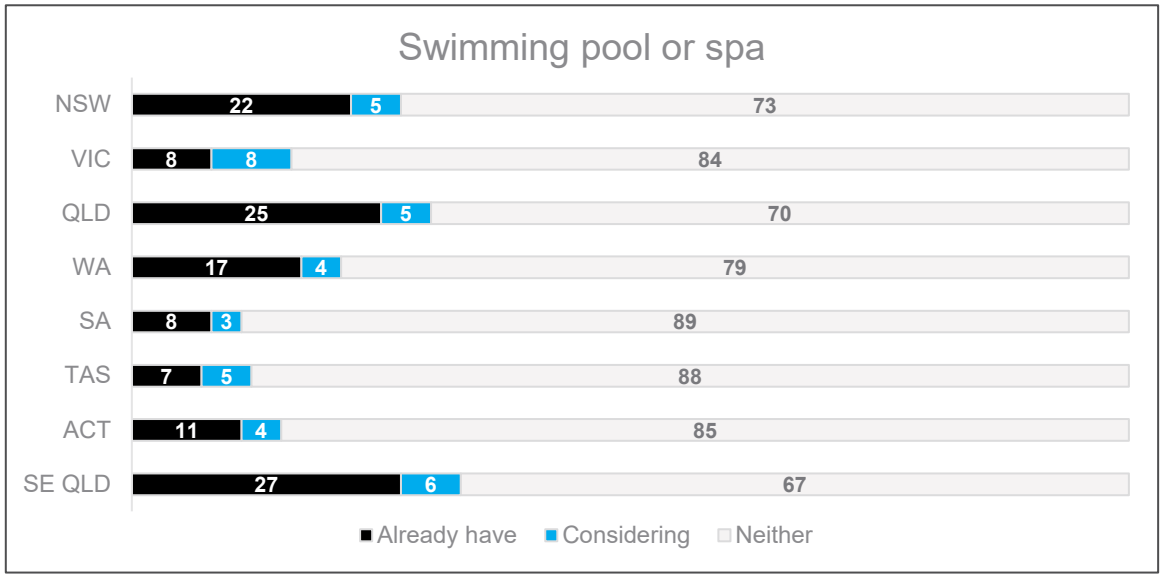

Battery storage system
NSW 6 24 70
VIC 6 24 70
QLD 4 25 71
WA 3 26 71
SA 5 39 56
TAS 7 30 63
ACT 5 35 60
SE QLD 4 25 71
Already have
Considering
Neither


Rooftop solar panels
NSW 22 22 56
VIC 21 23 56
QLD 38 14 48
WA 35 18 47
SA 43 18 39
TAS 31 24 45
ACT 31 27 42
SE QLD 39 14 47
Already have
Considering
Neither


Smart meter
NSW 26 12 62
VIC 78 5 17
QLD 19 14 67
WA 24 14 62
SA 23 16 61
TAS 19 11 70
ACT 24 19 57
SE QLD 20 13 67
Already have
Considering
Neither


Home energy management system
NSW 8 16 76
VIC 8 18 74
QLD 6 15 79
WA 6 13 81
SA 7 15 78
TAS 4 13 83
ACT 9 22 69
SE QLD 8 15 77
Already have
Considering
Neither


Dishwasher
NSW 61 5 34
VIC 63 6 31
QLD 63 3 34
WA 60 6 34
SA 52 7 41
TAS 68 7 25
ACT 84 7 9
SE QLD 66 2 32
Already have
Considering
Neither


Swimming pool or spa
NSW
22
5
73
VIC
8
8
84
QLD
25
5
70
WA
17
4
79
SA
8
3
89
TAS
7
5
88
ACT
11
4
85
SE QLD
27
6
67
Already have
Considering
Neither

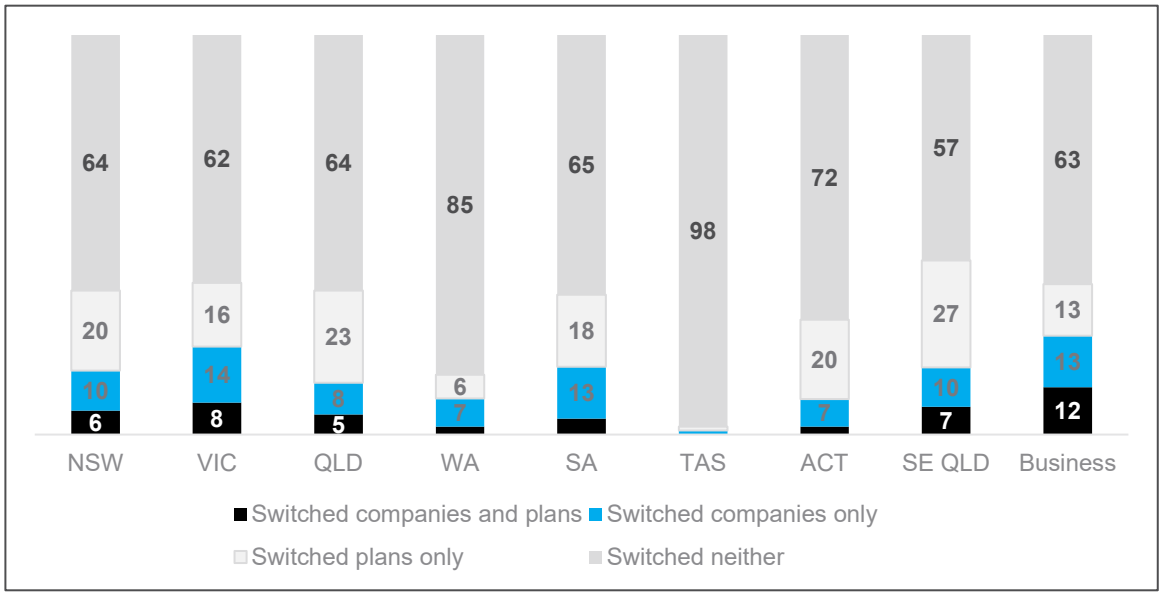
Activity

Recent switching

There are broadly similar proportions of recent switching activity among the states without price regulation, and with full retail contestability.

- There were similar proportions of switching activity among the states with the highest levels of competition - Victoria (38%), New South Wales (36%), Queensland (44% in South East Queensland, and 36% overall), and South Australia (35%).
- Small business consumers were most likely to switch both companies and plans (12%).

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



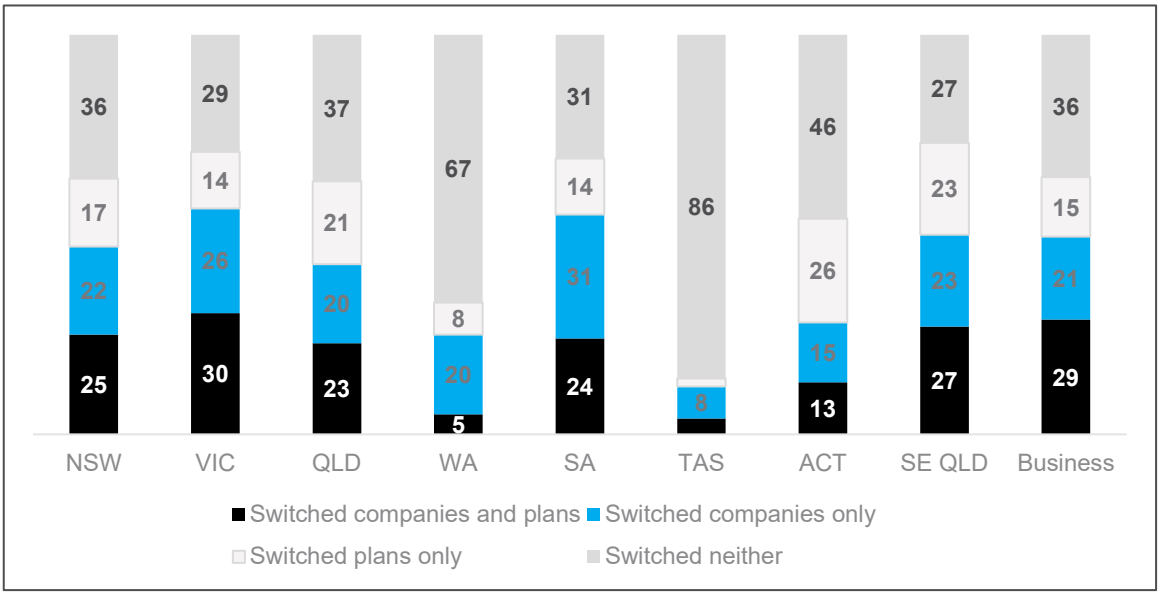
Note: For readability, percentages have been omitted where they are less than 5%

Switching history

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

- The proportion of consumers reporting they have never switched companies or plans is lowest in Victoria (29%), closely followed by South Australia (31%).
- Consumers in New South Wales (36%) and Queensland (37%) report similar rates of never switching. It is notable that rates in South East Queensland are significantly lower than for the state overall, reflecting that regional Queensland continues to have a single retailer whose prices are regulated by the Queensland Competition Authority.
- Small business consumers reported that 36% had never switched companies or plans.

Which of the following have you ever done?



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

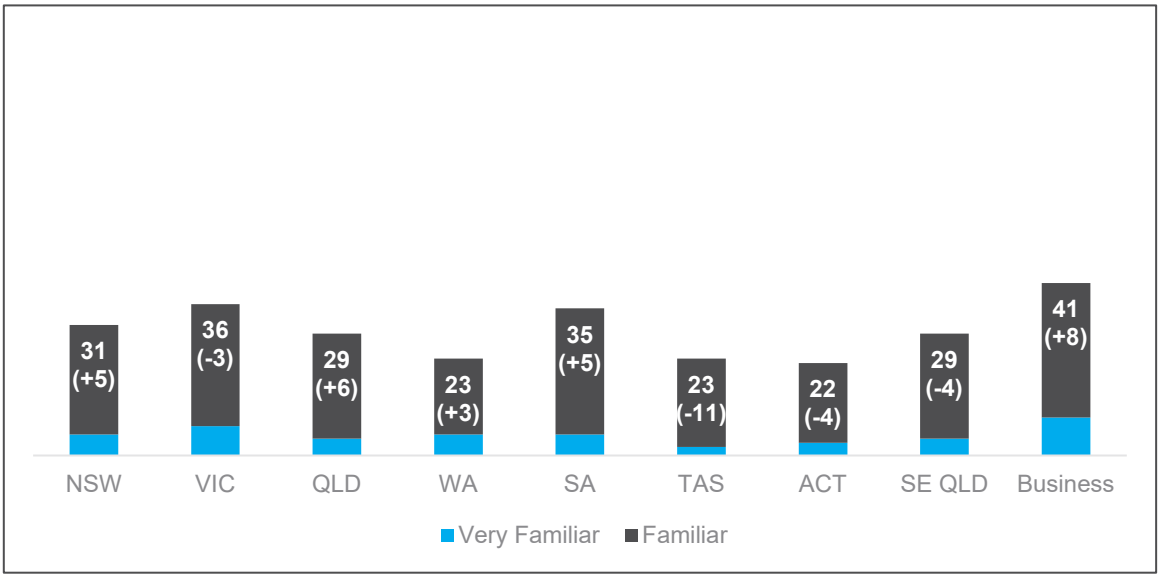
Other

Awareness of the Energy Ombudsman

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

- 41% of small business consumers claim to be familiar with the Ombudsman, as do 36% of Victorians and 35% of South Australians.
- 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?"



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

Small business

Satisfaction

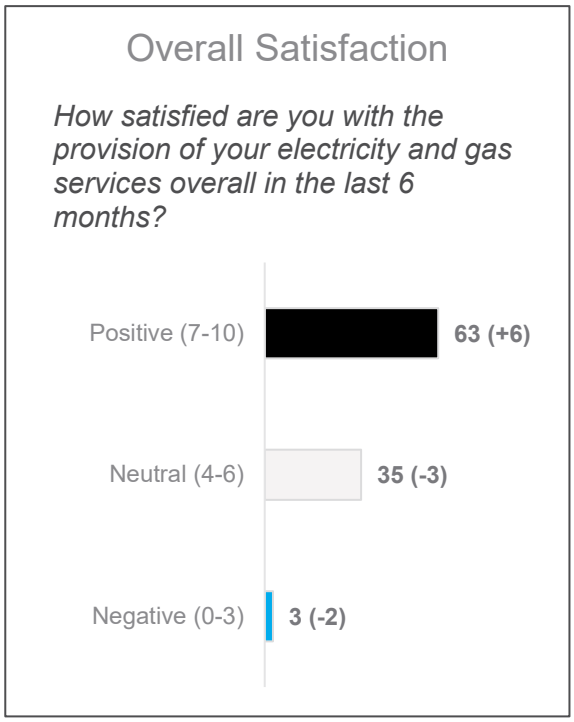
Overall satisfaction

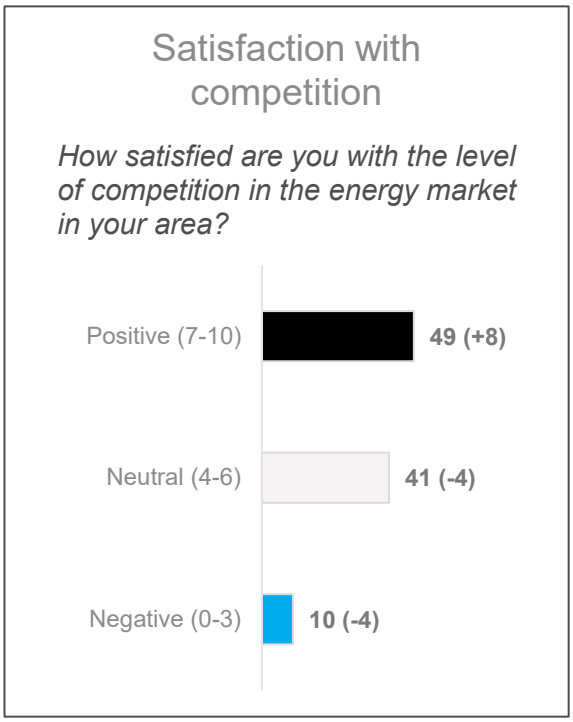
Satisfaction with electricity and gas services overall amongst small business consumers is up.

- 63% now say they are satisfied, up 6% since the December 2017 survey.

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

- 49% now report being satisfied, up 8%.



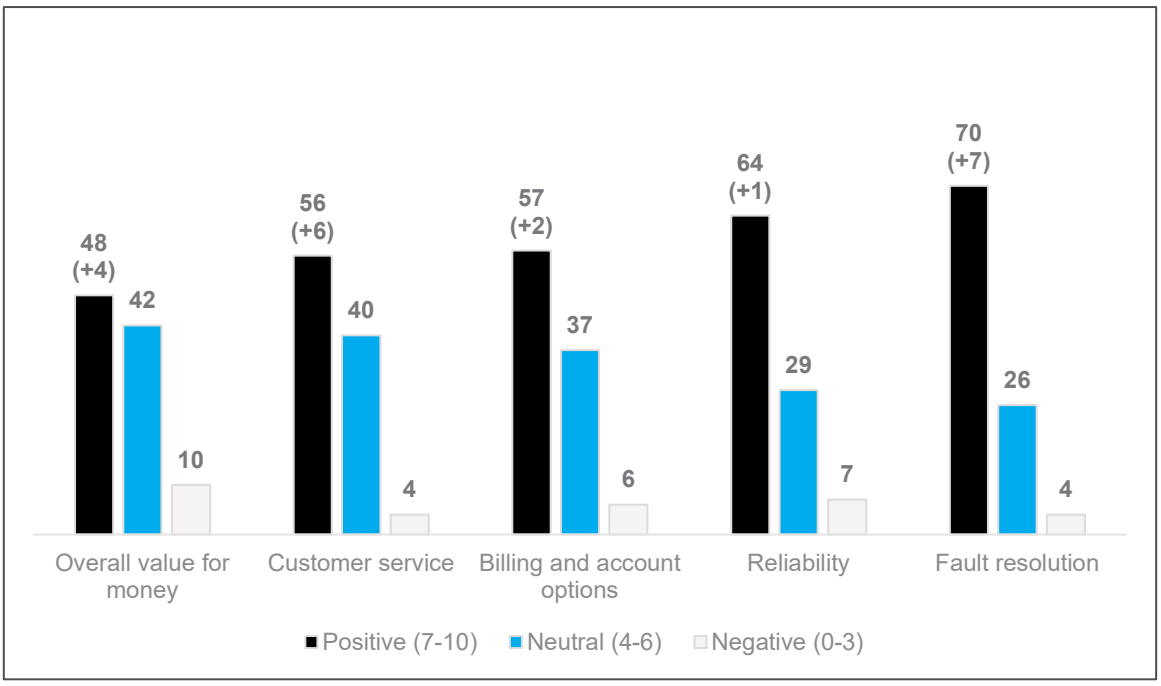


Satisfaction with electricity

Ratings from small business consumers have increased since December 2017 for each measure.

- The biggest changes are for fault resolution (up 7% to 70%) and customer service (up 6% to 56%).
- Satisfaction with value for money for electricity services is up 4% but still fewer than half (48%) of all respondents gave a positive ranking on this measure.

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

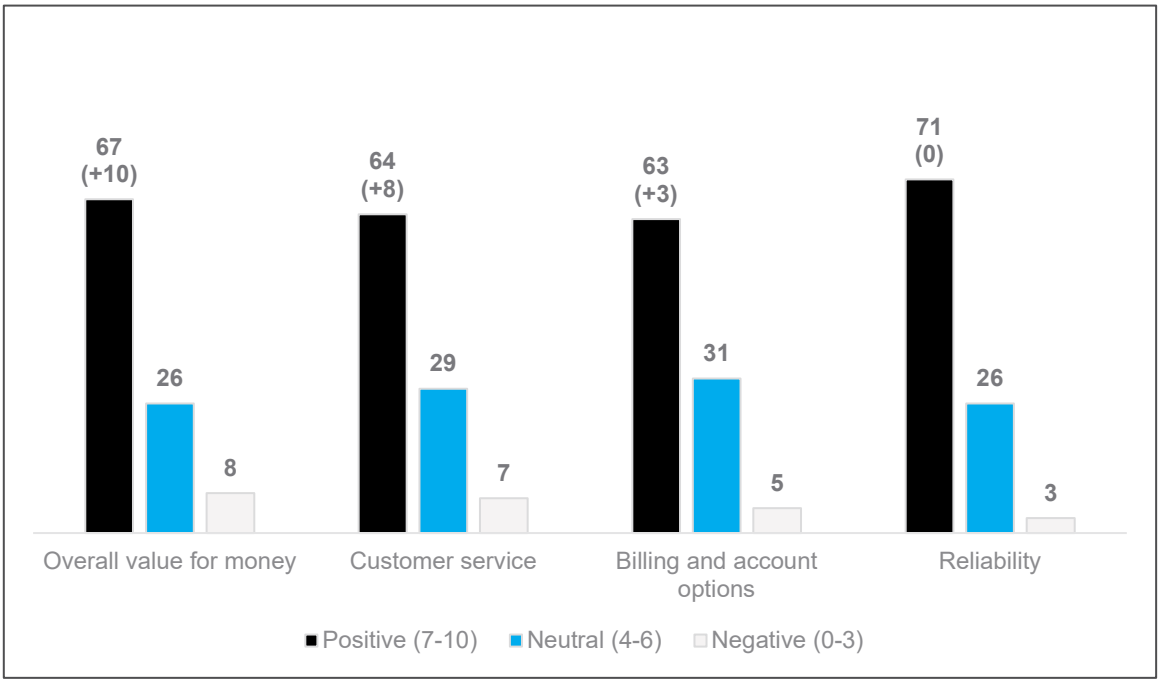


Satisfaction with gas

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

- 69% are satisfied with their overall value for money, up 10% from last year's survey
- 64% are satisfied with their customer service, up 8%.
- 63% are satisfied with their billing and account options, up 3%.
- 71% are satisfied with the reliability of their gas supply. While this figure is unchanged since last year, it remains the measure with the highest level of satisfaction.

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



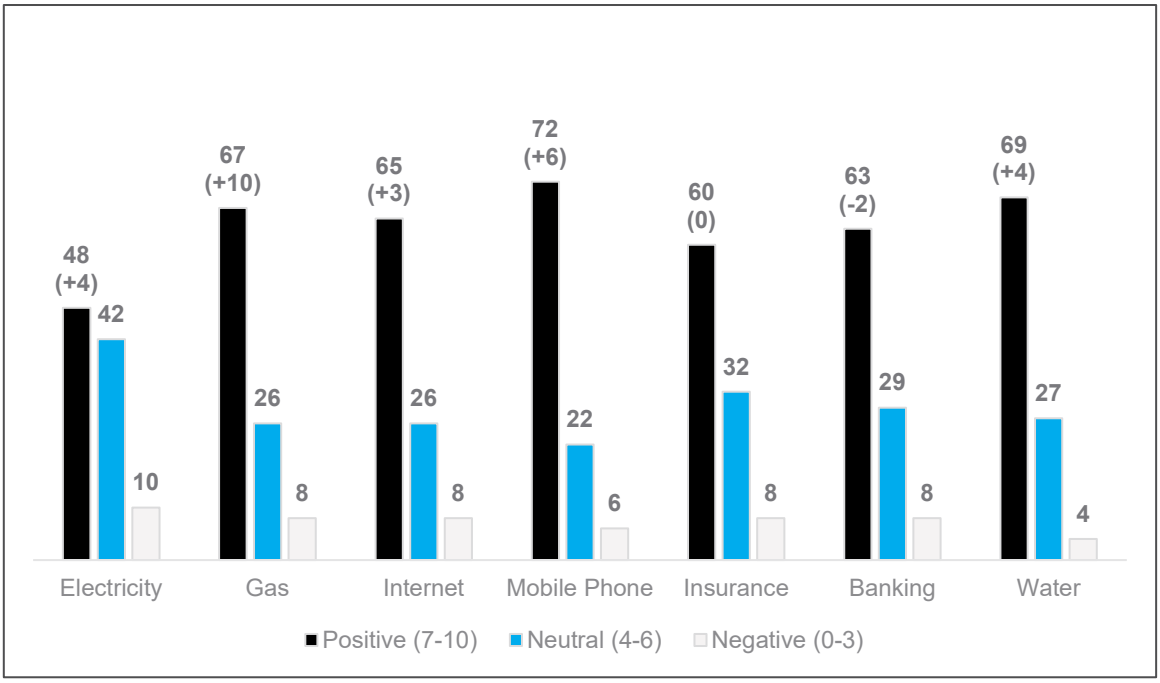
Base: Small business consumers with gas (n=163)

Satisfaction with utilities and services

There remains a significant gap between small business consumers' satisfaction with the value for money for electricity services, compared with other utilities and services.

- 48% are now satisfied with the value for money of their electricity service, an increase of 4% from December 2017.
- With a satisfaction level of 67% (up 10%), gas is now among the utilities and services with the highest level of satisfaction, trailing water (69% satisfied) and mobile phone services (72%).

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?

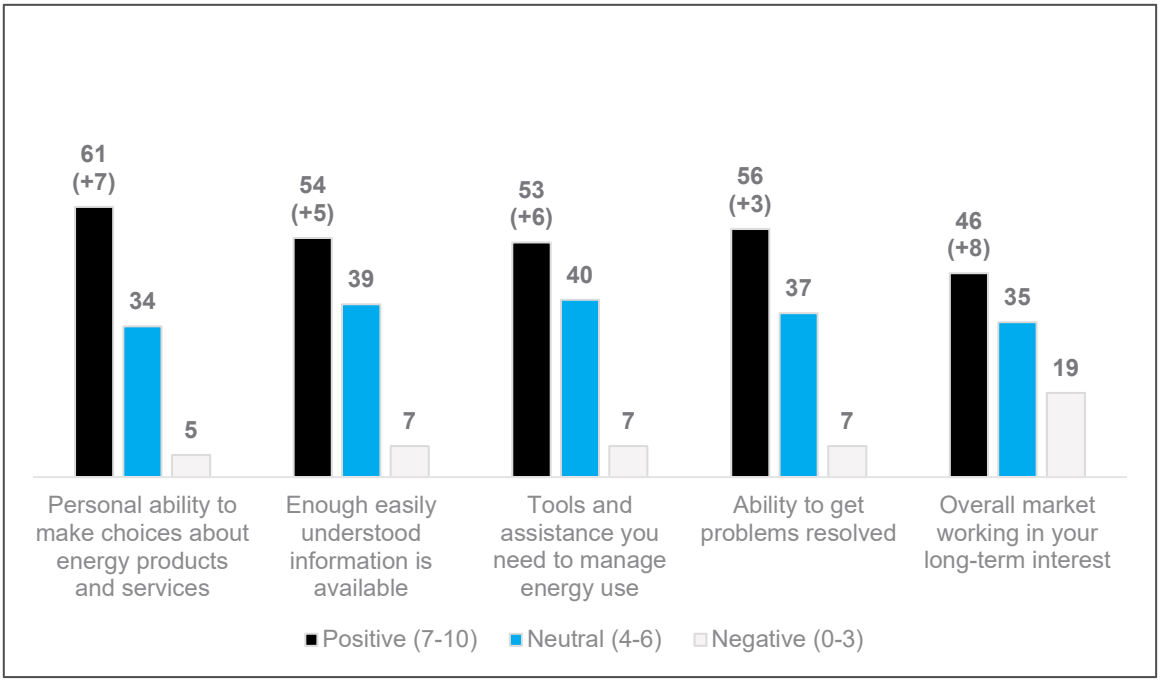


Confidence in information, tools and a working market

Confidence in each of the below measures has increased.

- The largest increase was seen in small business consumers' confidence in overall market working in their long-term interests although still fewer than half of all consumers provided a positive ranking on this measure (up 8% to 46%).
- Small business consumers' confidence in their personal ability to make choices about energy products and services also increased 7% to 61%. This remains the measure with the highest level of confidence.
- There were smaller increases in confidence relating to the availability of tools and assistance needed to manage energy use and costs (up 6% to 53%), and easily understood information about energy available to make decisions about energy products and services (up 5% to 54%).

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



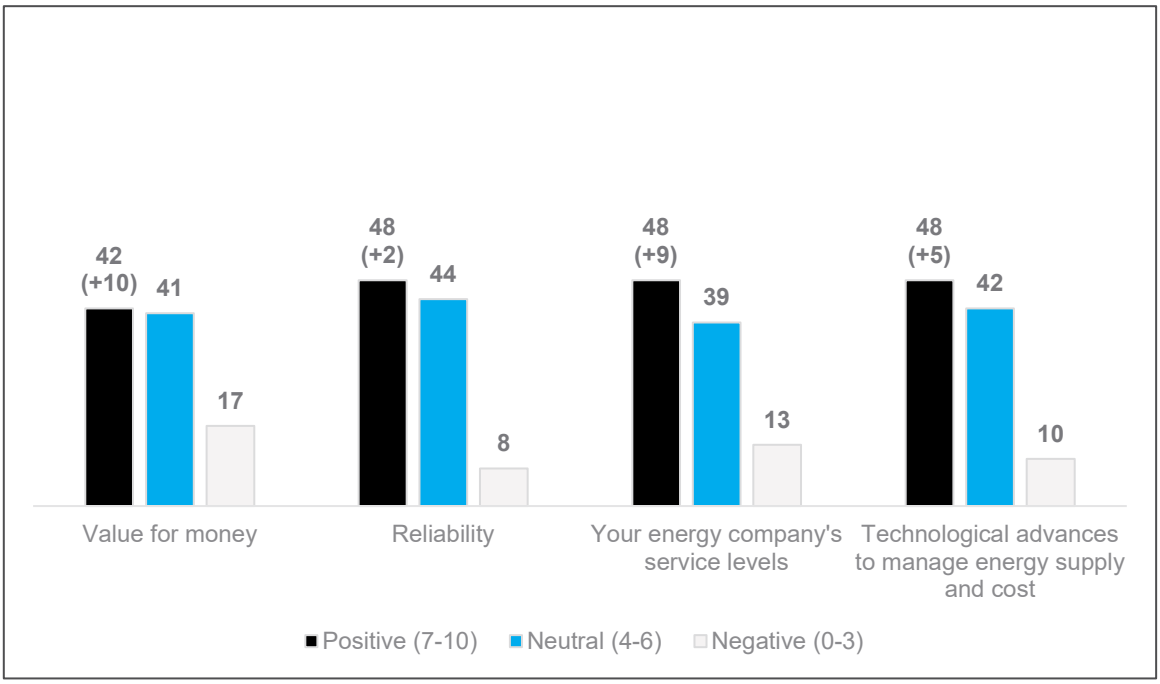
Confidence in long-term outcomes

Small business consumers in the latest survey were more 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 up 10% since December 2017, to 42%.
- There is also a 9% increase in the proportion confident that their energy company's service levels will improve (now 48%).
- There was also greater confidence that technological advances to manage energy supply and cost will improve (up 5% to 48%) and that energy reliability will be better in the future (up 2% to 48%).

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'



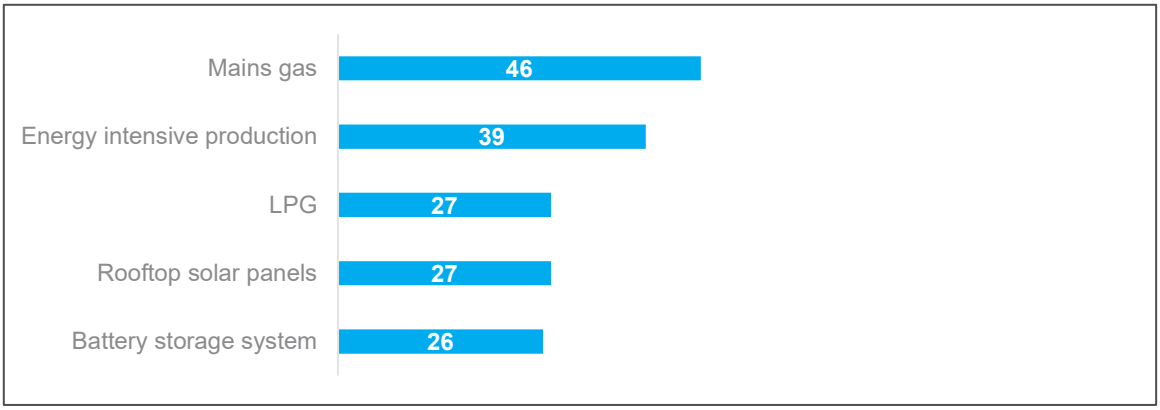
Activity

Uptake of technologies

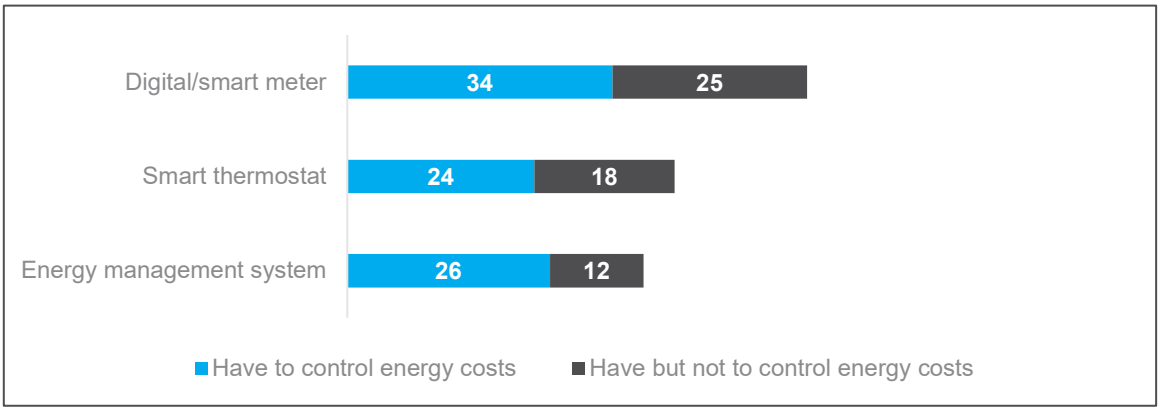
Small business consumers in this survey were asked about the technologies they have in their place of business, and which technologies are used to control energy costs.

- 59% of small businesses say they have a digital/smart meter, and 34% say they use one to control energy costs.
- 42% say they have a smart thermostat, with 24% using it to control energy costs.
- 38% say they have an energy management system, and 26% 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?



Base: Small business consumers whose primary place of business is not their home (n=150)

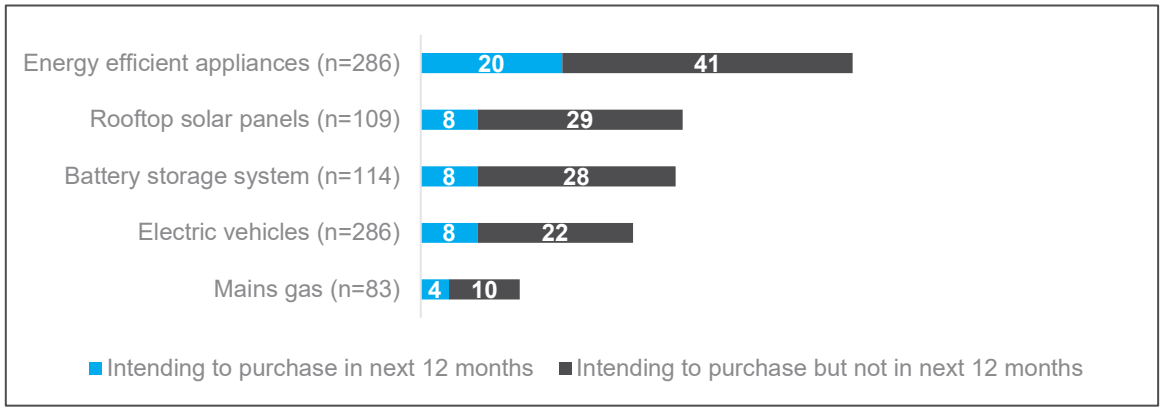
Activity

Future uptake of technologies

There continues to be reasonably strong interest among small business consumers in purchasing new technology in the future.

- 61% say they are intending to purchase energy efficient appliances for their business, with 20% saying they plan to do so in the next 12 months.
- 37% of small businesses who do not currently have solar panels say they are planning to purchase them, and 8% intend to do so in the next 12 months.
- 36% of small businesses who do not currently have battery storage say they intend to purchase a system, and 8% intend to do to so in the next 12 months.

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



Base: Small business consumers whose primary place of business is not their home (see chart for exact base)

Note: Other than ‘energy efficient appliances’ and ‘electric vehicles’, which were asked of the entire sample, figures are the percentage of those who do not already have that technology in their business.

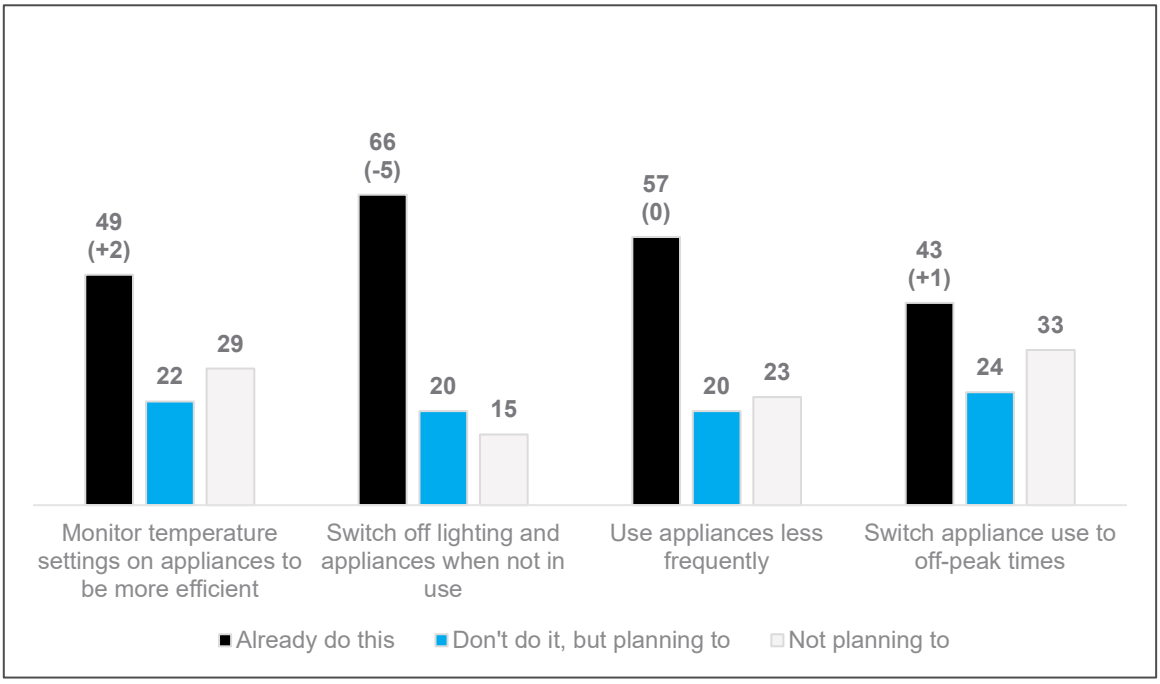
Activity

Reducing energy use

Switching off lighting and appliances is the most common way to reduce energy use in small businesses.

- 66% switch off lighting and appliances when not in use.
- 57% are using appliances less frequently.
- 49% of small business consumers are monitoring temperature settings on appliances.
- 43% say they are switching appliance use to off-peak times.

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

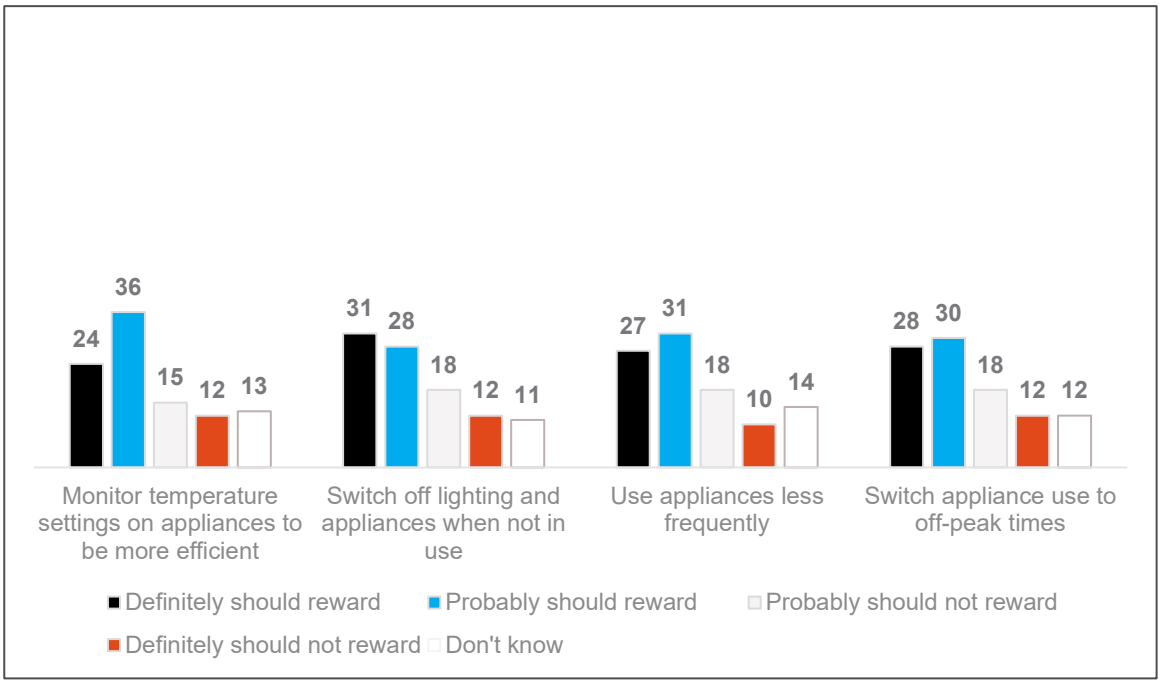


Reward for reducing energy use

Most small business consumers think customers should be rewarded for taking action to reduce their energy usage.

- 60% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.
- 59% think customers should be rewarded for switching off lighting and appliances when not in use.
- 58% think customers should be rewarded for using appliances less frequently.
- 58% think customers should be rewarded for switching appliance use to off-peak times.

Should electricity companies do more to financially reward customers who do the following:

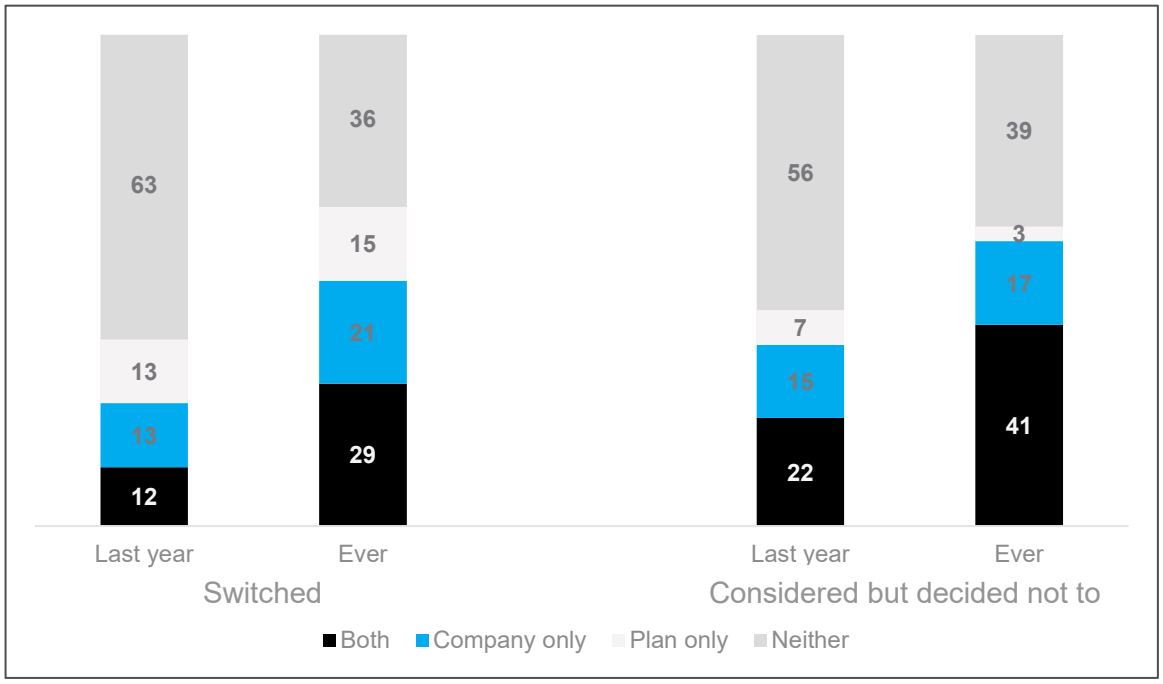


Switching behaviour

Most small business consumers have switched energy companies, but slightly fewer have switched plans with the same company.

- 65% say they have switched energy companies or plans in the past (38% in the last year).
- 61% say they have previously considered switching energy companies or plans but decided not to (44% in the last year).
- 36% have never switched energy companies or plans.

Which of the following have you done?



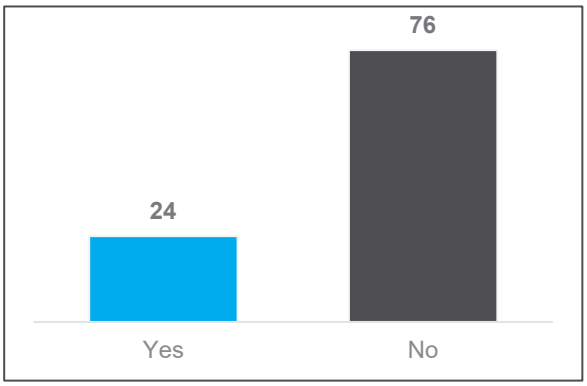
Activity

Reasons for considering switching

The main drivers for switching were searching price comparison websites and dissatisfaction with value for money.

- 31% said that they looked for a better price on a price comparison website the last time they looked at switching energy companies.
- 24% plan to switch energy companies in the next year.

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



Base: All small business consumers (n=286)

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

Base: Small business consumers who have switched or looked at switching in the past (n=196)

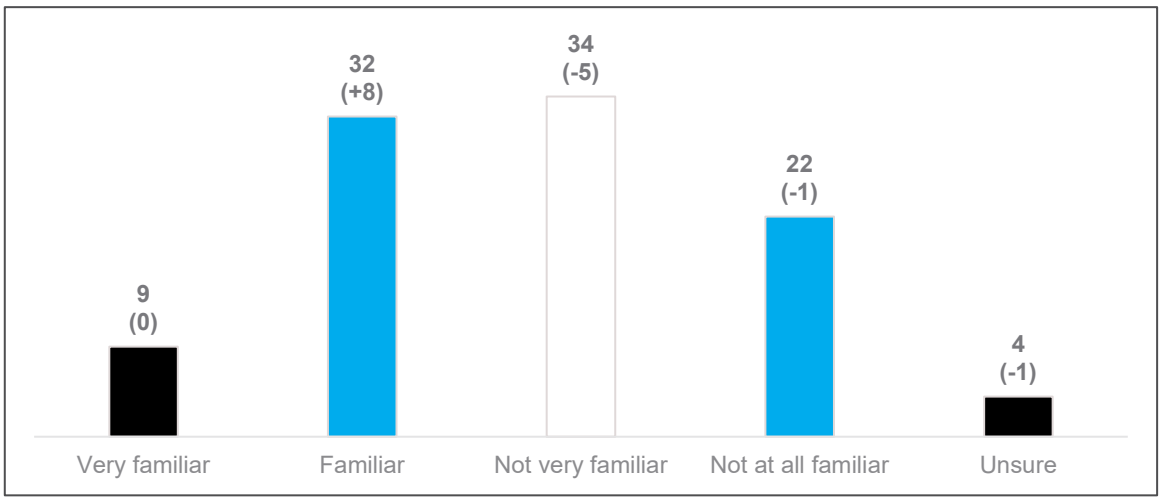
Other

Awareness of the Energy Ombudsman

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

- 41% of small business consumers claim to be familiar with the Ombudsman, up 8%.

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



New South Wales

Satisfaction

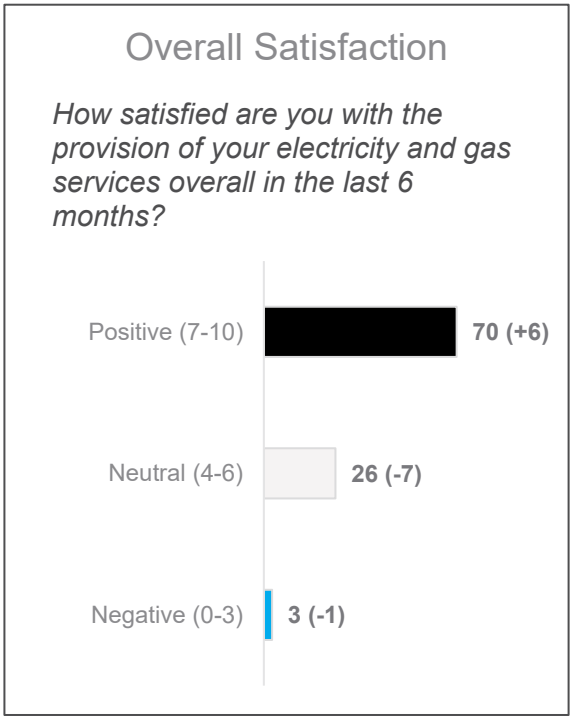
Overall satisfaction

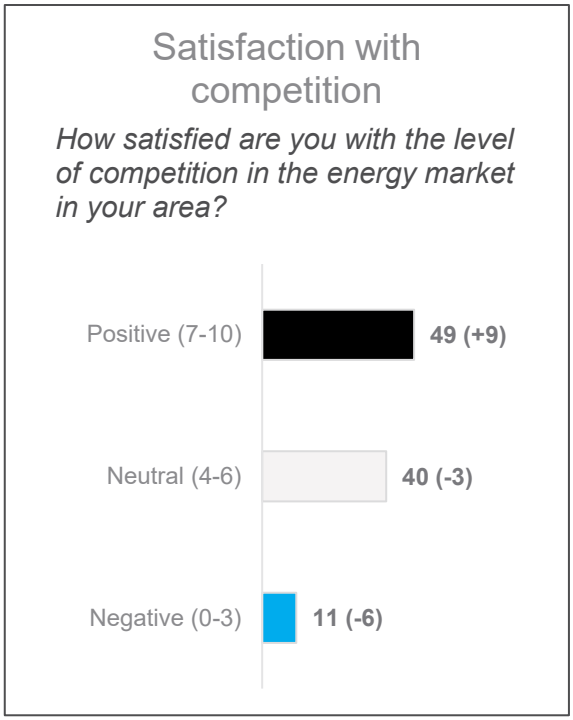
Satisfaction with energy services among NSW household consumers has increased since last year's survey.

- 70% are satisfied, up 6% from December 2017.

Satisfaction with the level of competition is also up.

- 49% say they are satisfied with the level of competition, up 9% since December 2017.



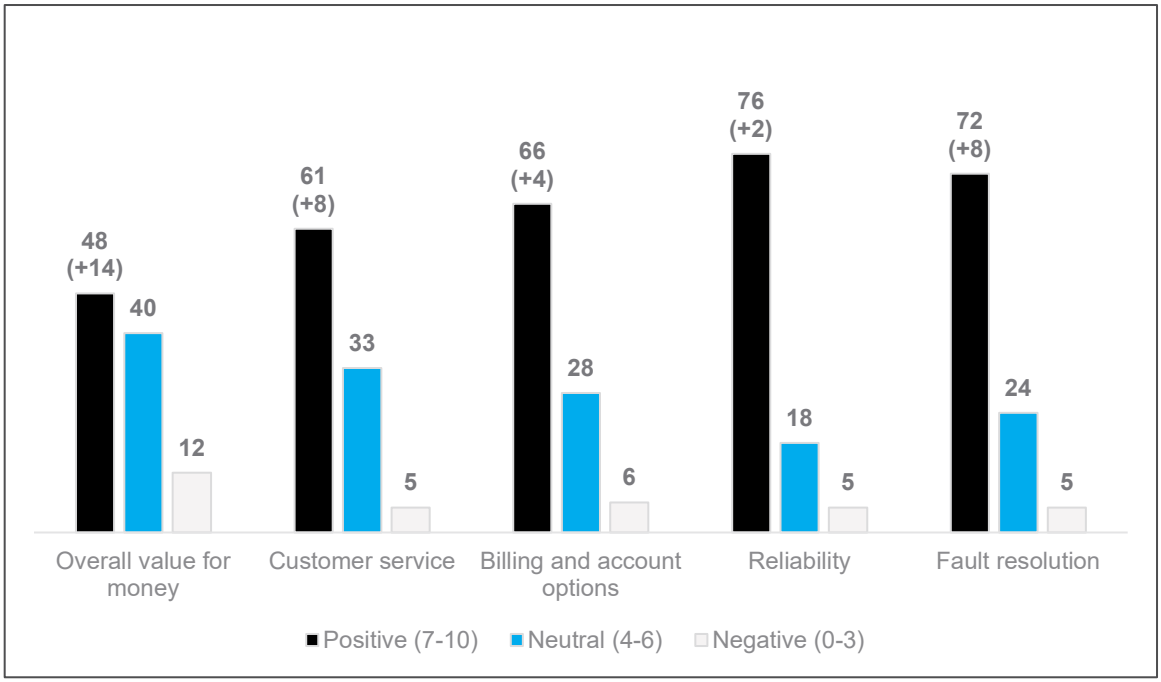


Satisfaction with electricity

Satisfaction has increased across all measures in NSW.

- The largest increases in satisfaction were for overall value for money (up 14% to 48%), fault resolution (up 8% to 72%) and customer service (up 8% to 61%).
- There are still very high levels of satisfaction with the reliability of NSW's power supply (up 2% to 76%)

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

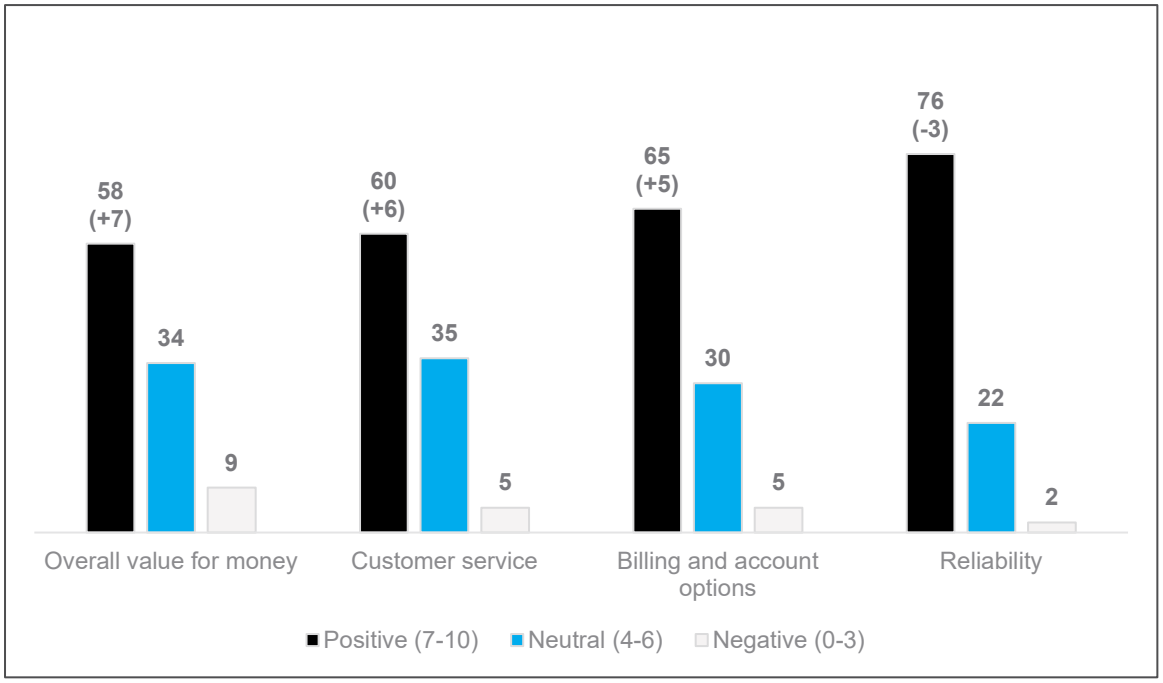


Satisfaction with gas

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

- 58% are satisfied with the value for money they get for gas, up 7% since December 2017.
- 60% are satisfied with their gas company's customer service (up 6%).
- 65% are satisfied with their billing and account options (up 5%).
- 76% are satisfied with reliability of their service (down 3%).

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



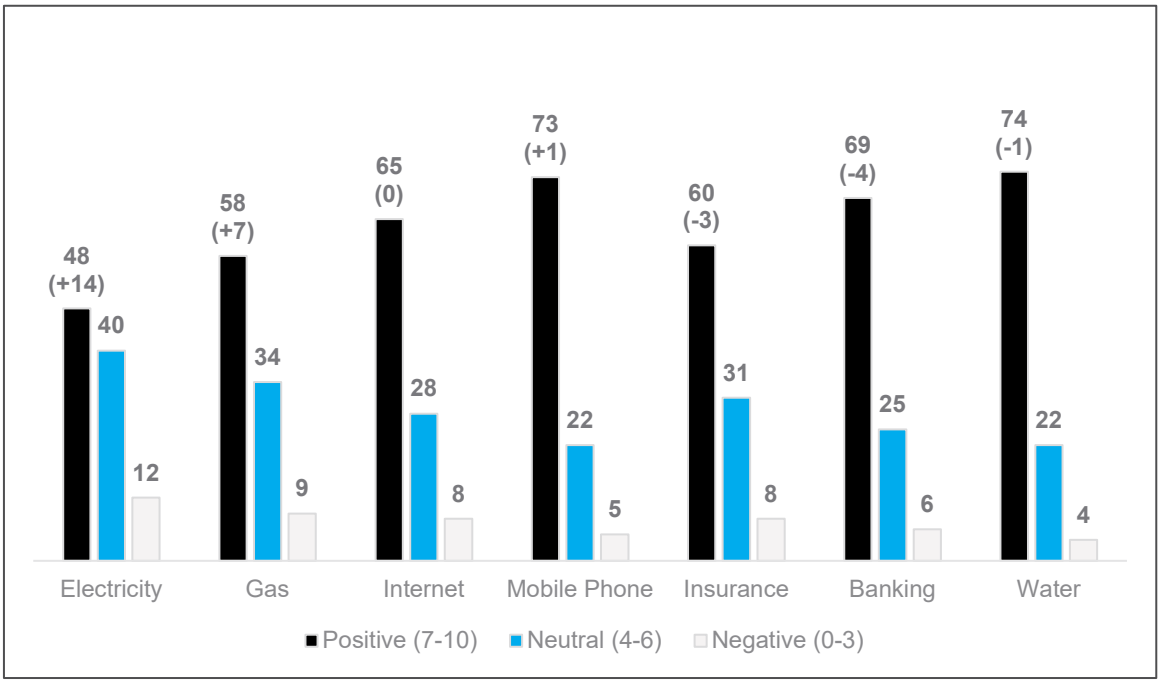
Base: New South Wales consumers with gas (n=220)

Satisfaction with utilities and services

While there has been an improvement, NSW consumers still rate the value for money of their electricity services behind all other utilities and services.

- The increase in satisfaction for electricity (up 14% to 48%) and gas (up 7% to 58%) brings both services closer to the satisfaction levels of other utilities.

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?

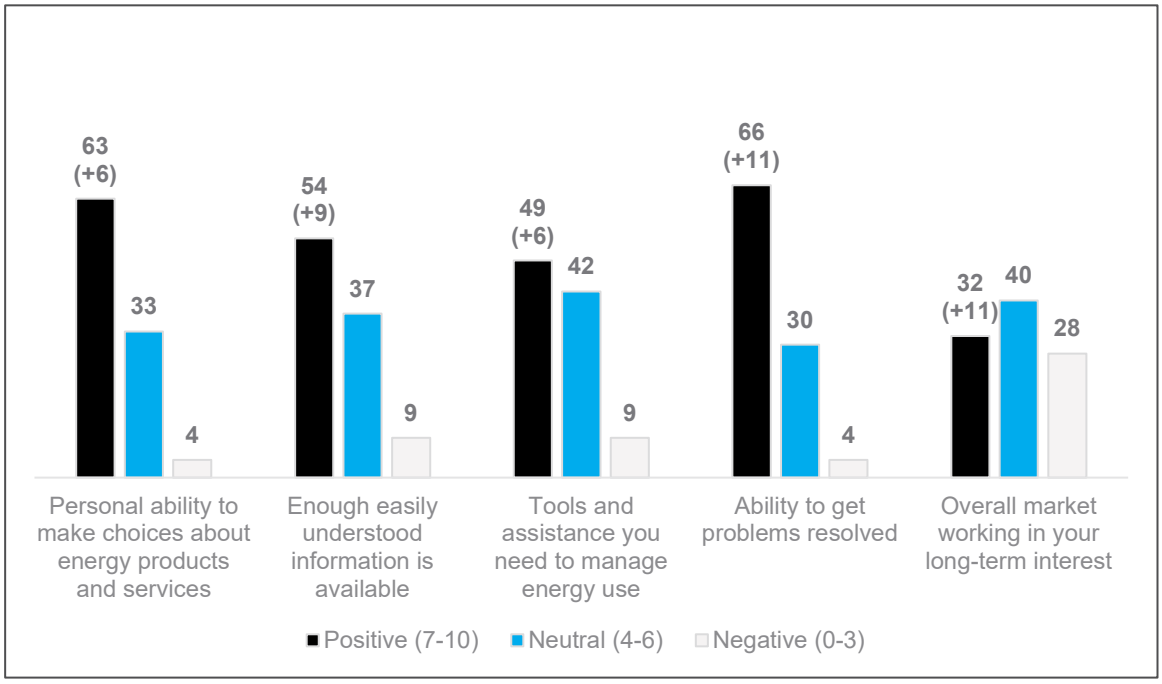


Confidence in information, tools and a working market

NSW consumers are confident in their own ability to make choices and resolve issues with their energy services, but fewer consumers are confident in the information and tools available to help them with their decisions. Meanwhile, confidence in the overall market has increased off a low base.

- 63% are confident in their personal ability to make choices about energy products and services (up 6%); and 66% are confident in their ability to get problems resolved (up 11%).
- 54% say they are confident there is enough easily understood information available to make choices about energy services (up 9%); and 49% say they are confident they have the tools and assistance they need to manage their energy use and costs (up 6%).
- The proportion who think that the overall market is working in their long-term interests has increased by 11% to 32%, though confidence in this measure is still markedly lower than for other measures.

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



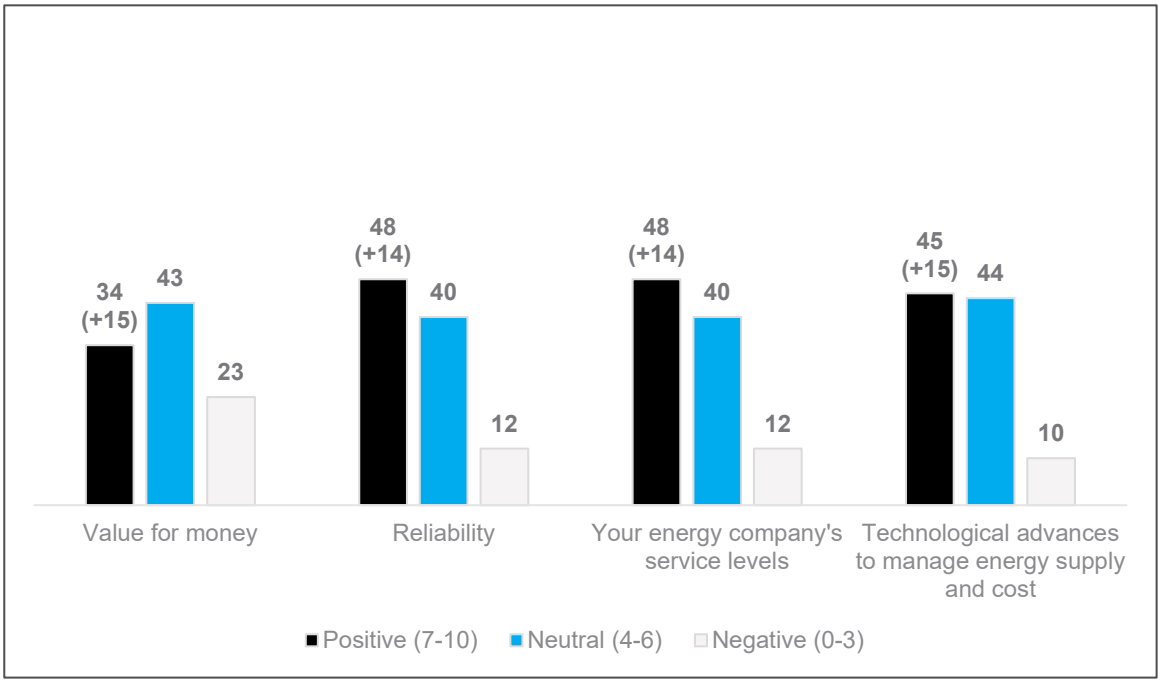
Confidence in long term outcomes

Consumer confidence in long term outcomes has increased sharply off a low base.

- 34% of NSW household consumers say that they are confident that value for money outcomes will improve in the future (up 15%).
- 45% say that they are confident in the likelihood of future technological advances to manage energy supply (up 15%).
- 48% say they are confident in the reliability of their energy service improving (up 14%).
- 48% say they are confident their energy company's service levels will improve in the future (up 14%).

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'



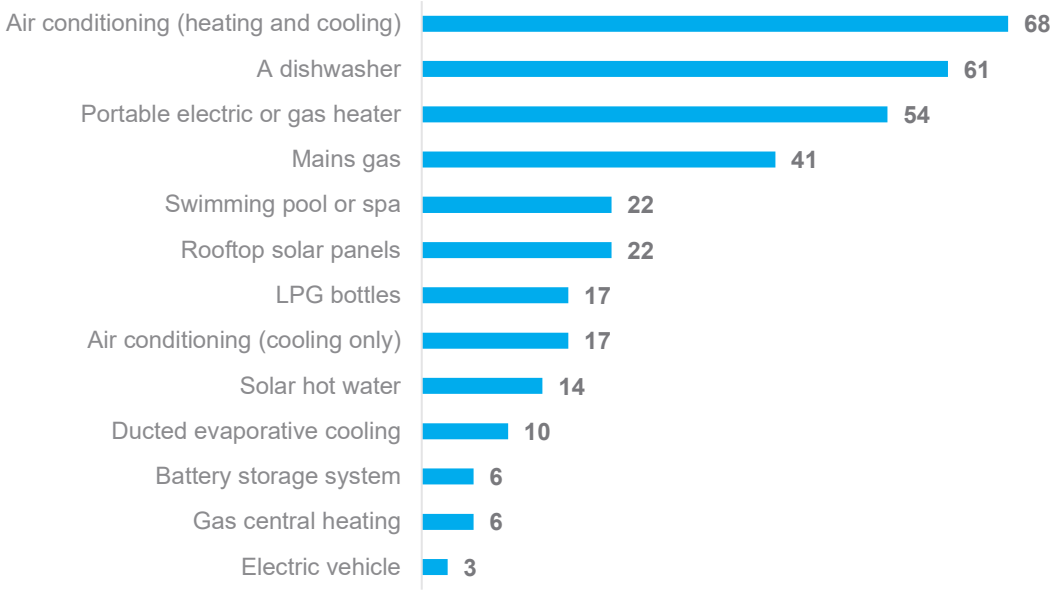
Activity

Use of technologies

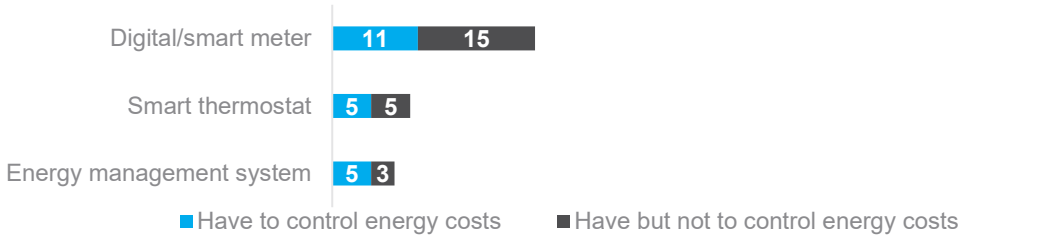
Most NSW consumers' households contain air conditioning for heating and cooling (68%), dishwashers (61%), and portable heaters (54%).

While 26% say they have a digital/smart meter, less than half (11%) 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?



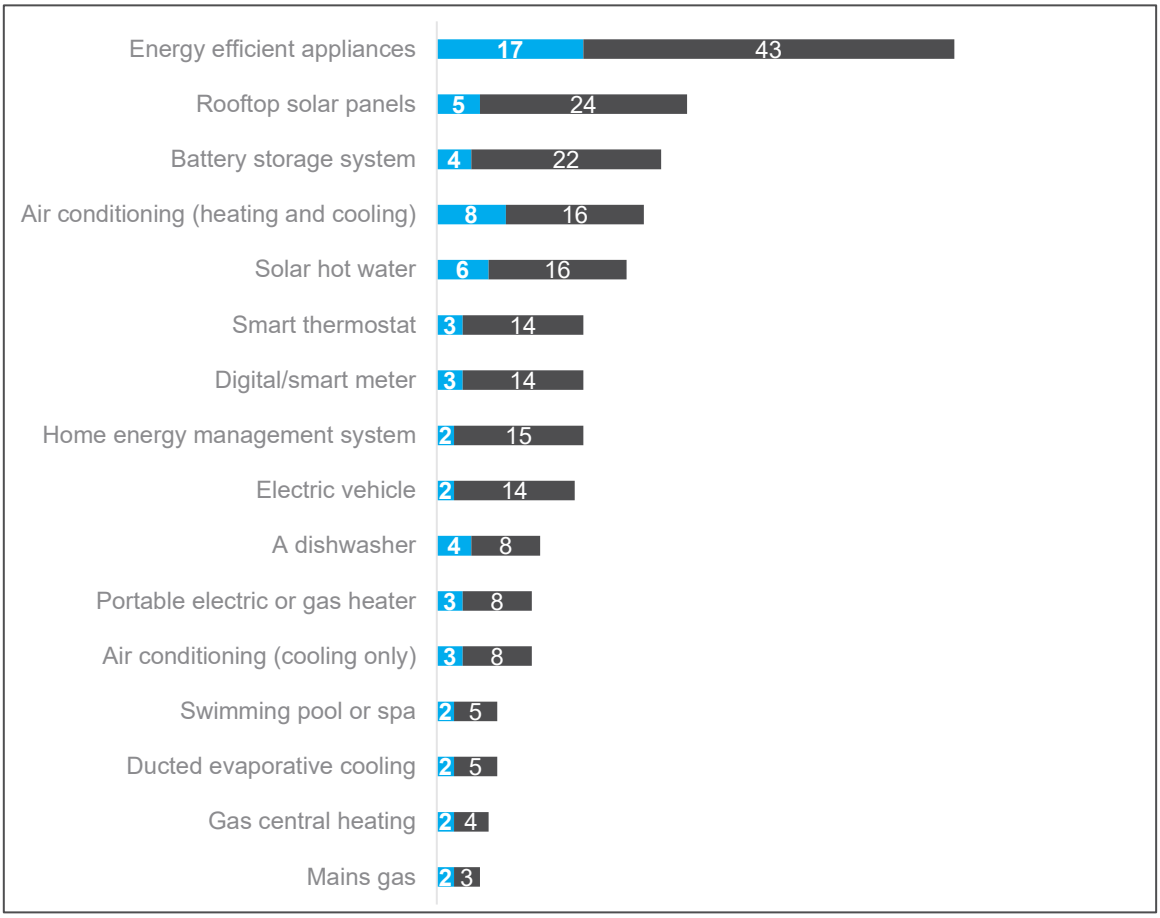
Activity

Uptake of technologies

NSW household consumers show interest in purchasing more energy efficient appliances, but mostly not in the near future.

- 60% say they are intend to purchase energy efficient appliances and 17% plan to do so in the next 12 months
- Of those who do not already have rooftop solar, 29% say they intend to install solar panels (5% in the next 12 months), and 26% of those without battery storage plan to purchase a system (4% in the next 12 months).

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



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

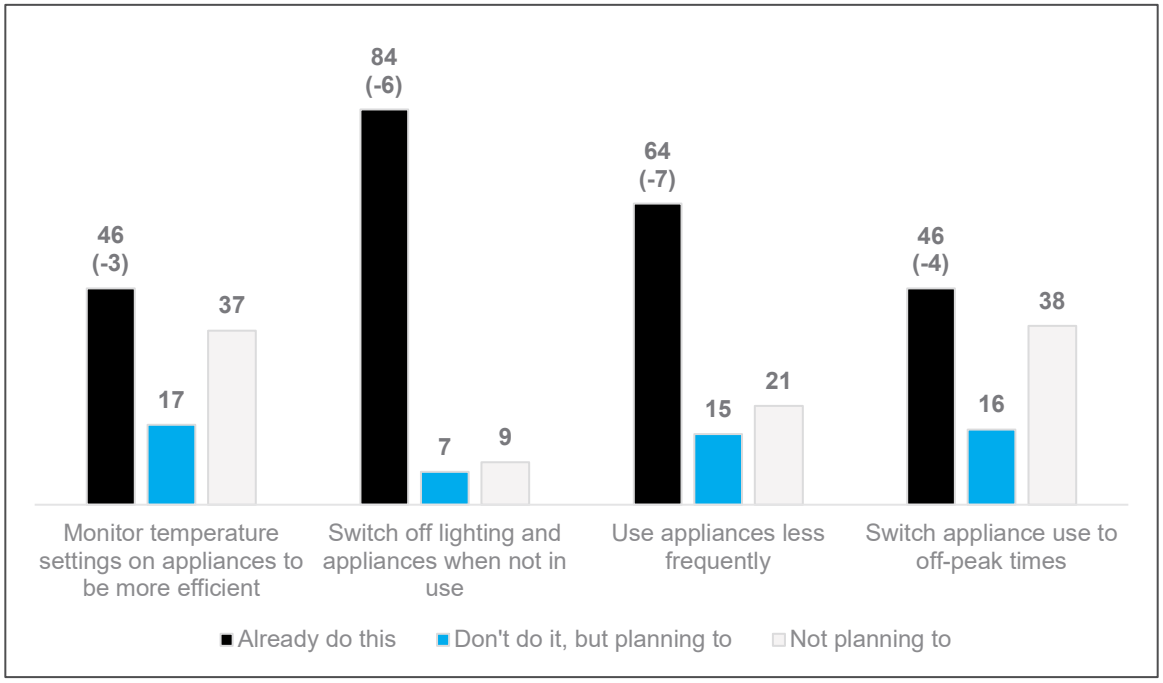
Activity

Energy saving practices

Although substantial proportions of NSW household consumers claim to be taking steps to limit their energy use, the numbers are down slightly.

- 84% say they already switch off lighting and appliances when not in use (down 6%).
- 64% say they already use appliances less frequently to conserve energy (down 7%).
- 46% say they already switch appliance use to off-peak times (down 4%).
- 46% say they monitor temperature setting on appliances to be more efficient (down 3%).

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



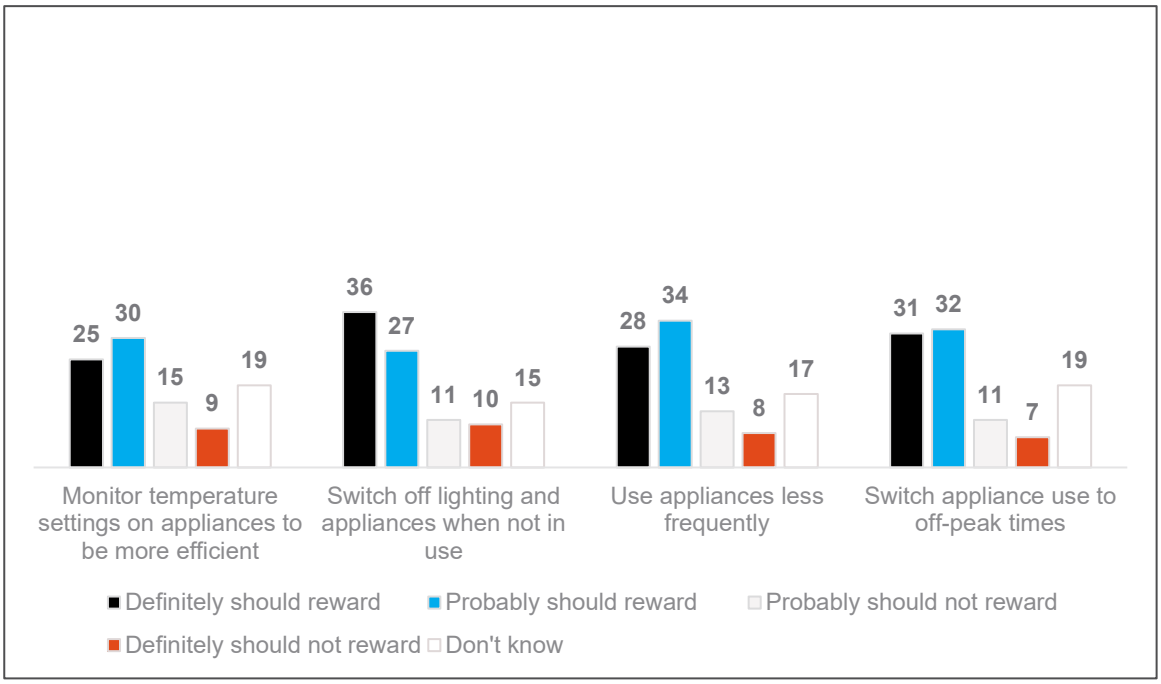
Activity

Reward for reducing energy use

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

- 63% think customers should be rewarded for switching off lighting and appliances when not in use.
- 63% think customers should be rewarded for switching appliance use to off-peak times.
- 62% think customers should be rewarded for using appliances less frequently.
- 55% think customers should be rewarded for monitoring temperature settings on appliances to be more efficient.

Should electricity companies do more to financially reward customers who do the following:



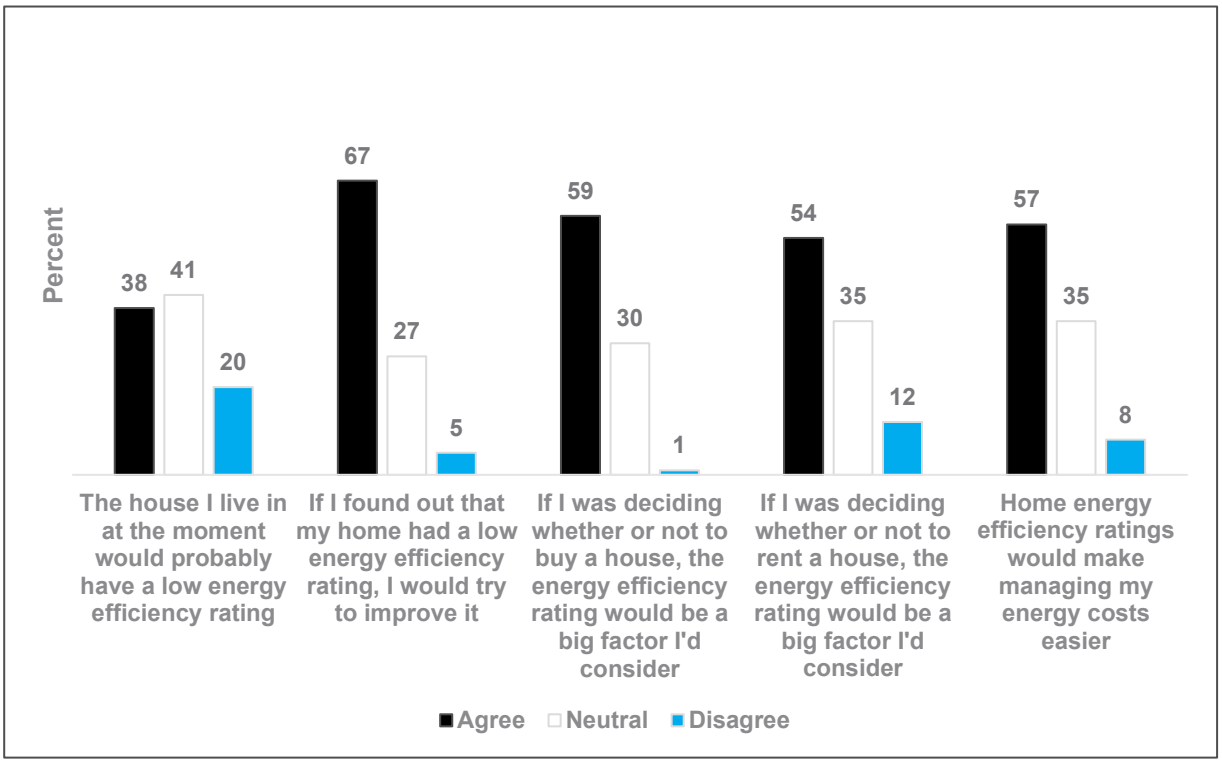
Activity

Housing energy efficiency

Most NSW consumers are interested in the energy efficiency of their home.

- 67% said they would try to improve their home's energy rating if they found out it had a low rating.
- 59% said that an energy rating would be a big factor they would consider when buying a house.
- 54% said that an energy rating would be a big factor they would consider when renting a house.
- 57% said that a home energy efficiency rating would make managing their energy costs easier.
- The largest proportion (41%) are neutral whether their home would have a low energy rating or not.

Do you agree or disagree with the following?

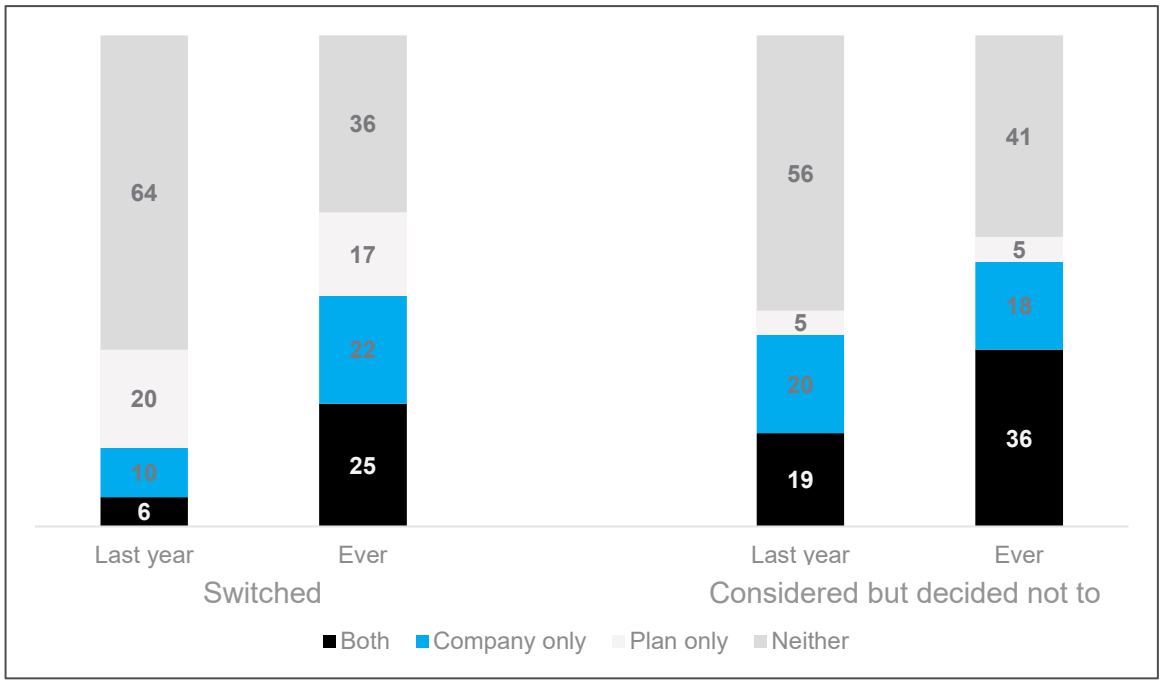


Switching behaviour

Over a third of NSW consumers have switched energy companies or plans in the last year.

- 64% say they have switched energy companies or plans in the past (36% in the last year). 36% have never switched.
- 59% say they have previously considered switching energy companies or plans but decided not to (44% in the last year).

Which of the following have you done?



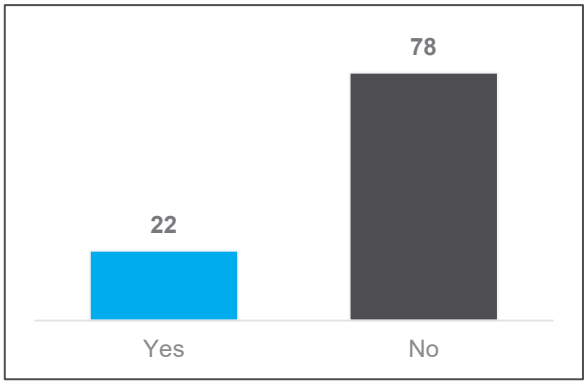
Activity

Reasons for considering switching

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

- 31% of those who have looked at switching in the past said that they were dissatisfied with the value for money they were receiving from their retailer.
- 22% say they intend to switch plans or retailers in the next year.

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



Base: All consumers (n=401)

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

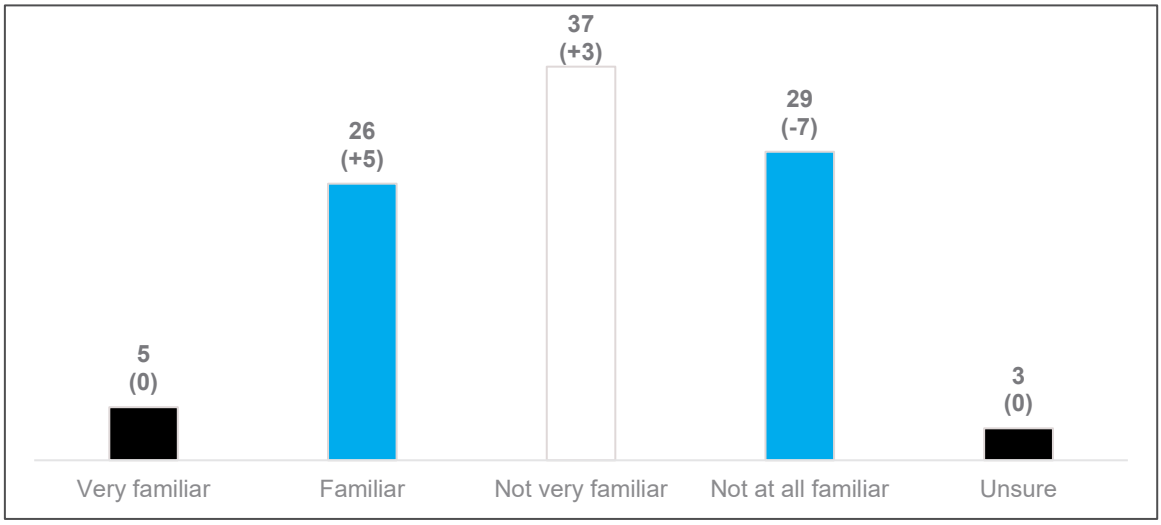
Base: Consumers who have switched or looked at switching in the past (n=278)

Other

Awareness of the Energy Ombudsman

31% of NSW consumers said they are 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?



Victoria

Satisfaction

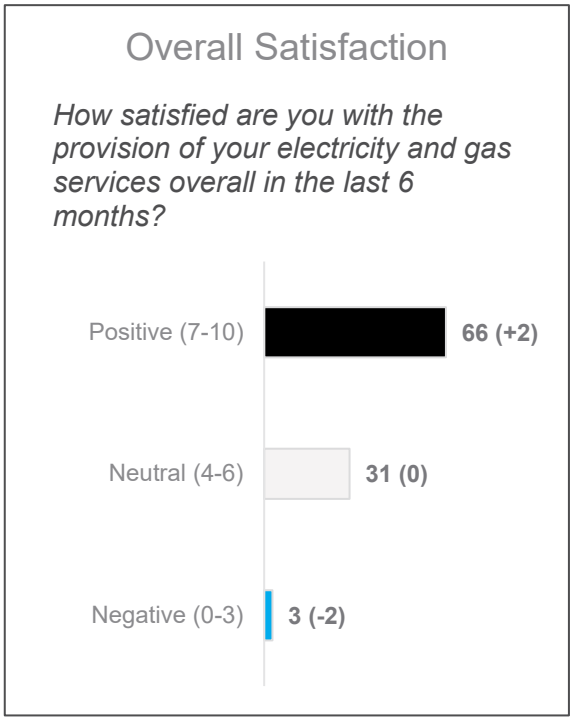
Overall satisfaction

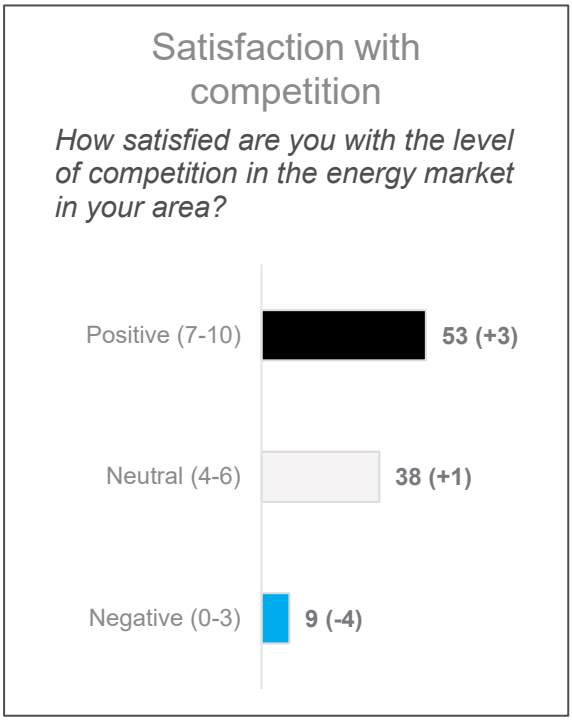
Satisfaction with the provision of electricity and gas services overall has increased slightly since December 2017.

- 66% are satisfied with their electricity and gas services, up 2% since last year's survey.

Satisfaction with the level of competition has also increased.

- 53% are positive about the level of competition in the energy market in their area, up 3%.



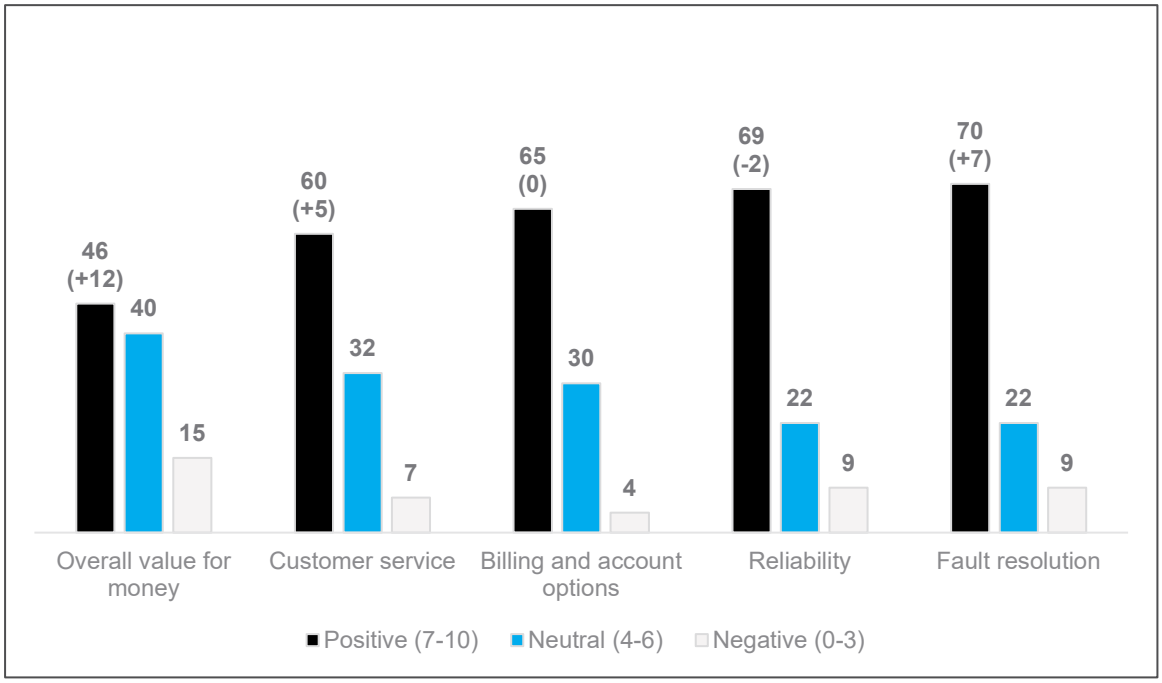


Satisfaction with electricity

Satisfaction with the value for money of electricity services has increased, off a low base, since December 2017.

- 46% are satisfied with overall value for money of their electricity service, up 12%.
- 70% are satisfied with their fault resolution, up 7%.
- 60% are happy with their customer service, up 5%.
- The only measure showing a decrease compared with December 2017 was reliability, where satisfaction was down by 2% to 69%.

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

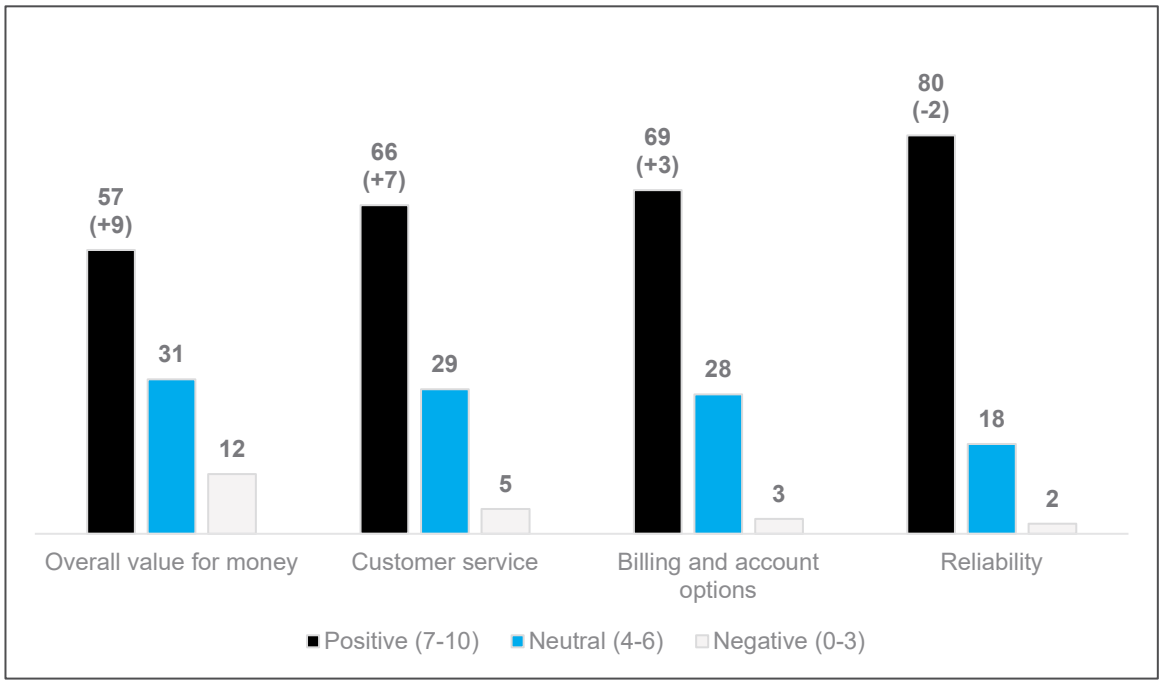


Satisfaction with gas

Satisfaction with gas services has increased across all measures except reliability.

- 57% are satisfied with the value for money of their gas service, up 9% from December 2017.
- 66% are satisfied with their gas provider's customer service, up 7%.
- The proportion satisfied with the reliability of their gas service decreased by 2% to 80%, however this remains the measure with the highest level of satisfaction.

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



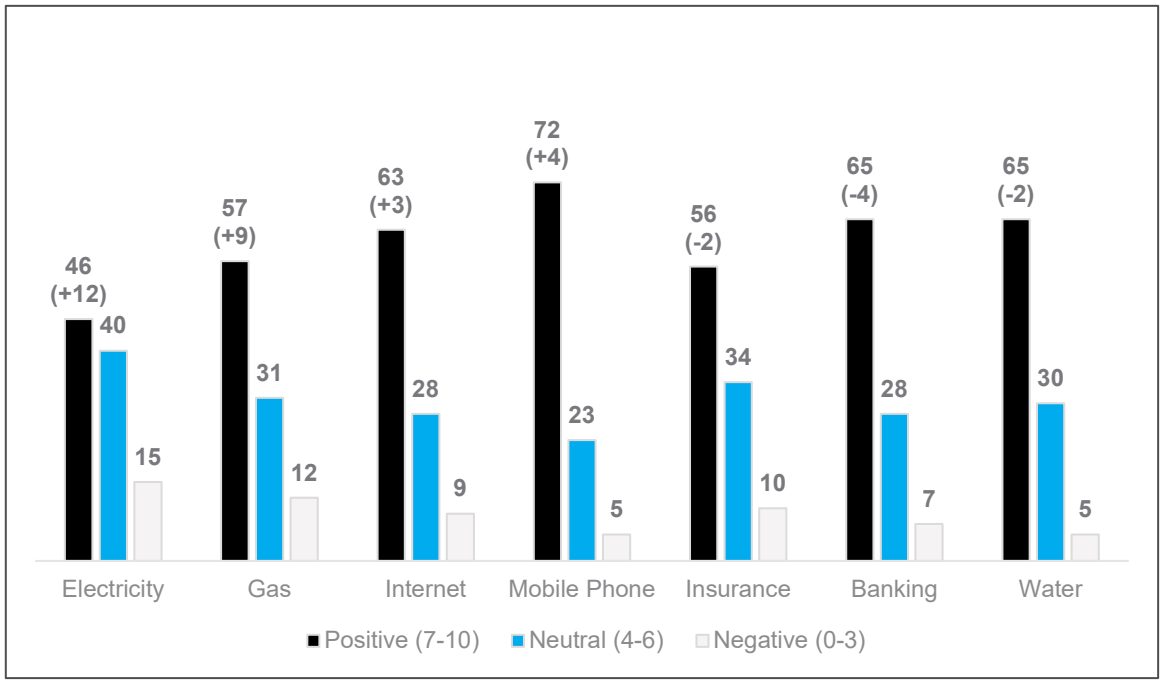
Base: Victorian consumers with gas (n=348)

Satisfaction with utilities and services

In terms of value for money, satisfaction with electricity and gas has increased in Victoria, however electricity remains the lowest-ranked service on this measure.

- Other than electricity (up 12% to 46%) and gas (up 9% to 57%), the other utilities for which satisfaction increased were mobile phone (up 4% to 72%) and internet services (up 3% to 63%).

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

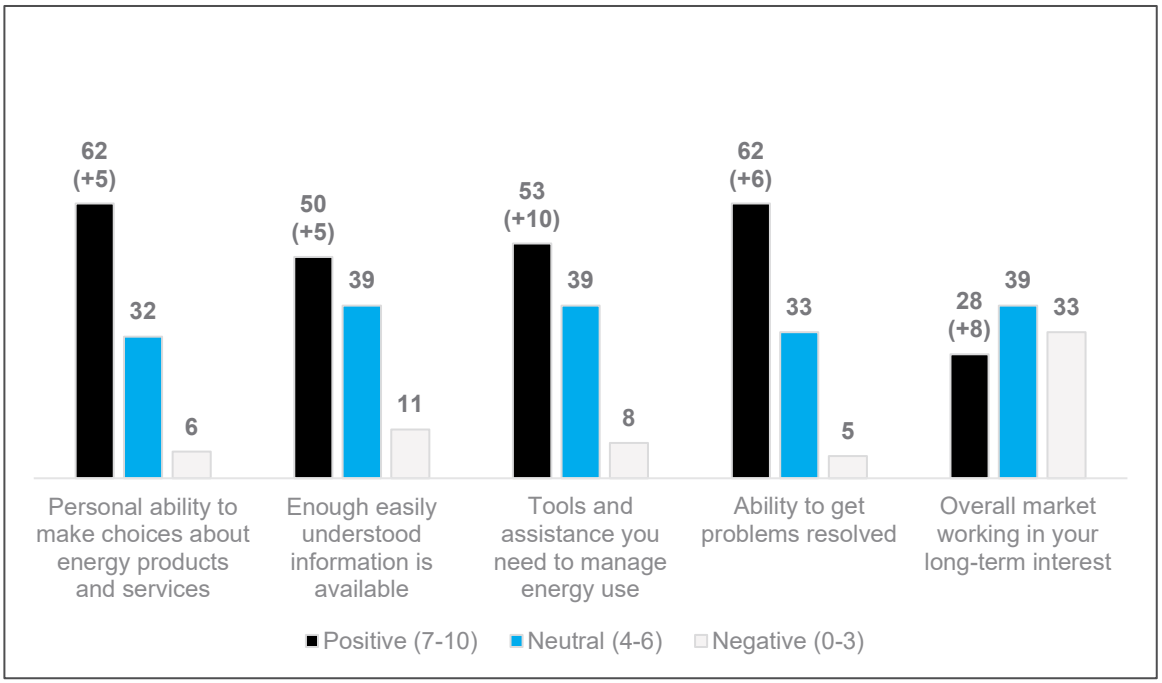


Confidence in information, tools and a working market

Consumer confidence in the information and tools available to support their decision making is up across all measures, and confidence in the market is up off a low base.

- 62% are confident about their ability to get problems resolved, up 6% and the same number are confident in their own ability to make choices about energy products and services.
- 53% are confident in the tools and assistance they need to manage their energy use (up 10%); while 50% are confident there is enough easily understood information available to support their decision making about energy products and services (up 5%).
- 28% are confident the overall market is working in their long-term interests (up 8%).

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



Confidence in long term outcomes

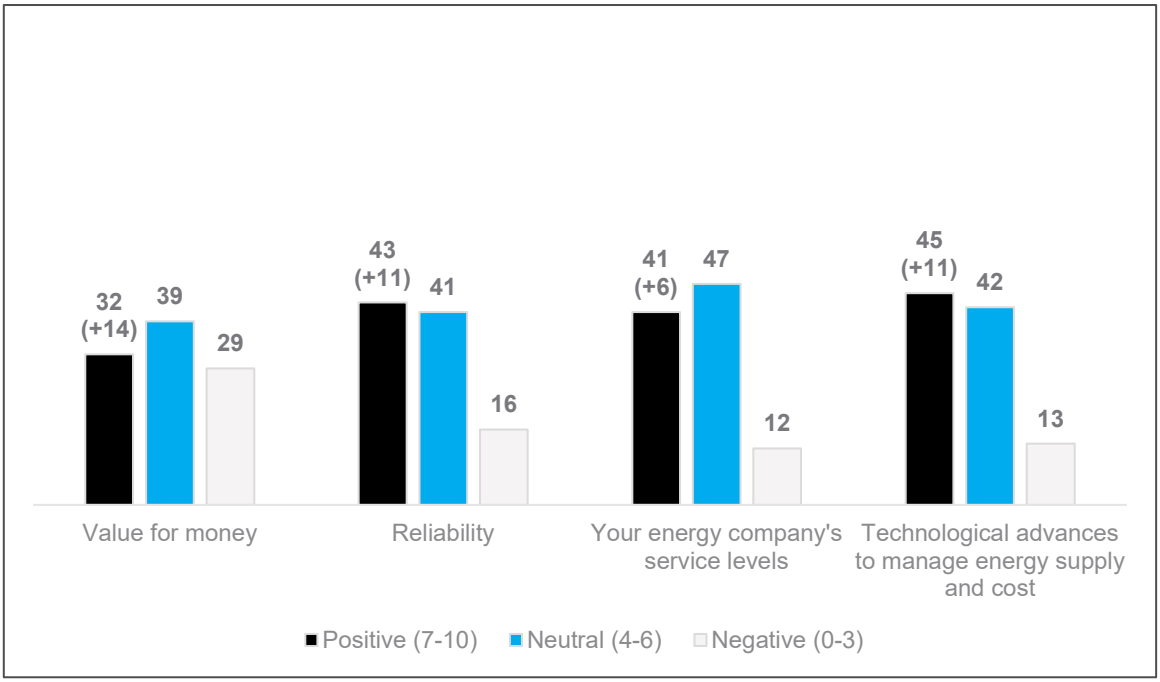
Consumer confidence in the energy market delivering better long-term outcomes has increased sharply off a low base across most measures.

Confidence increased by double-digit amounts for the following measures:

- Value for money (up 14% to 32%).
- Technological advances to manage energy supply and cost (up 11% to 45%).
- Reliability of energy supply (up 11% to 43%).

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'



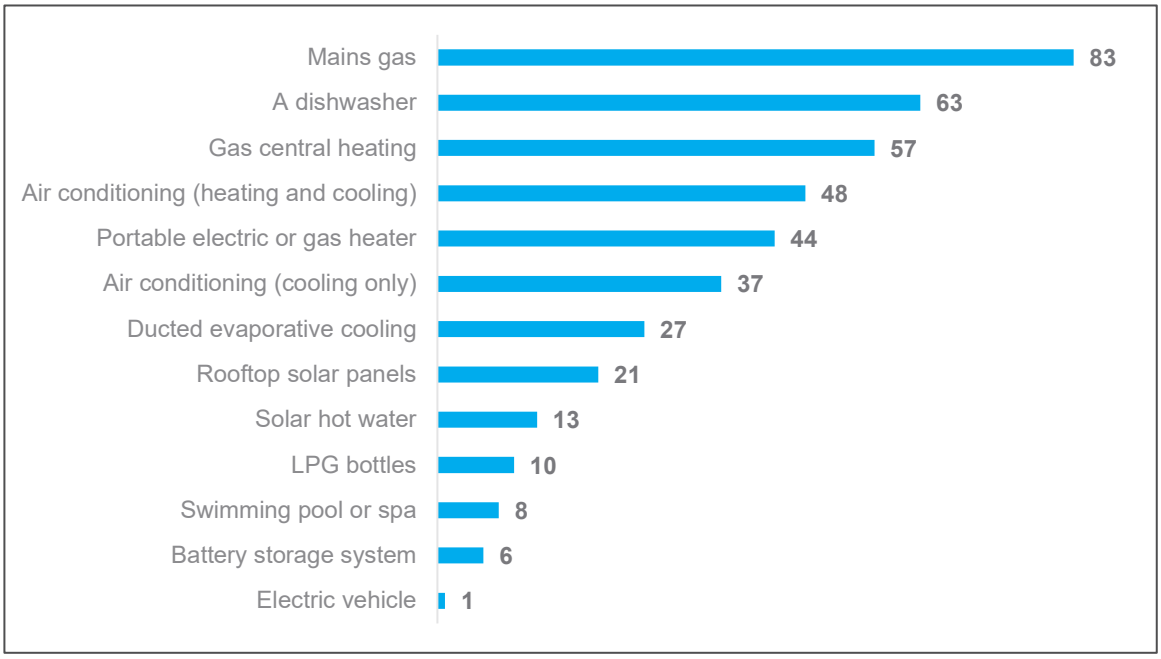
Activity

Use of technologies

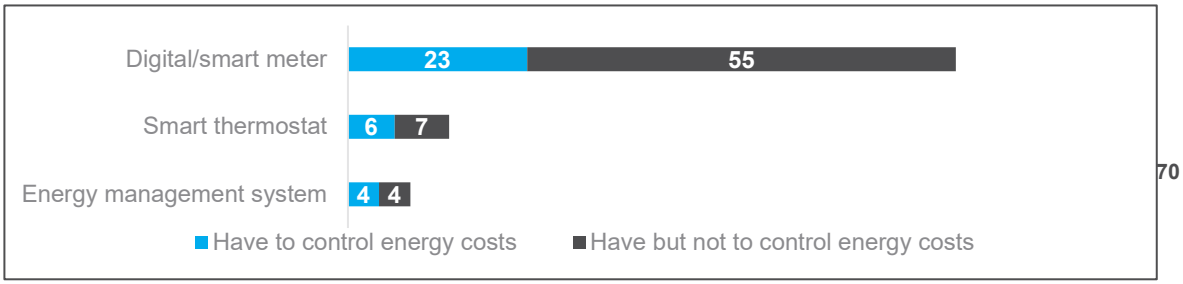
Victorians are using a variety of technologies to heat their homes and while most say they have a smart meter installed, few say they use it to manage their energy use and costs.

- 57% say that they have gas central heating.
- 48% say they have air conditioning for both heating and cooling.
- 44% say they have a portable electric or gas heater.
- 78% have a digital/smart meter and 23% say they use it to manage their energy use and costs.
- 21% say they have rooftop solar PV installed.

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?



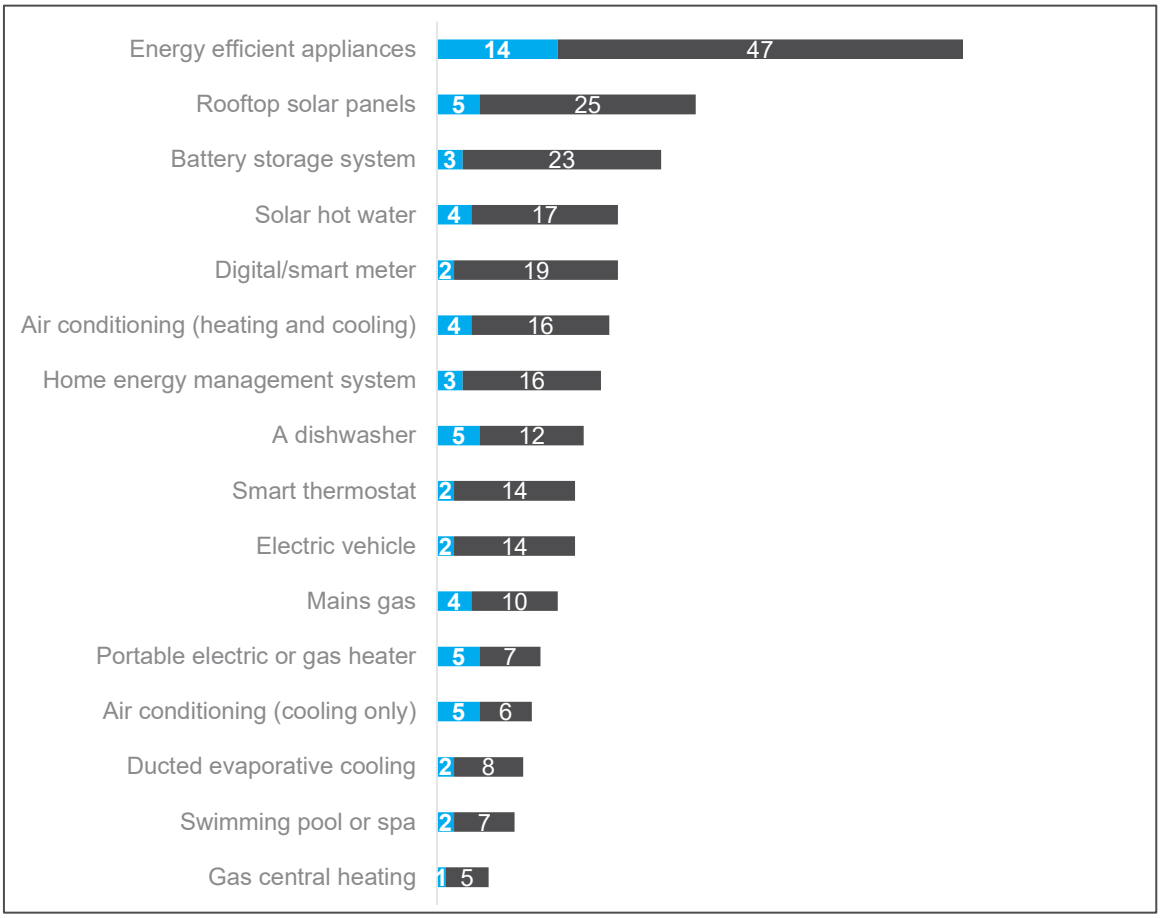
Activity

Uptake of technologies

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

- Of those who do not currently have solar panels, 30% say they are considering installing them, including 5% who say they intend to do so in the next 12 months.
- 26% are considering a battery storage system and 3% intend to purchase a system in the next 12 months.

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



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

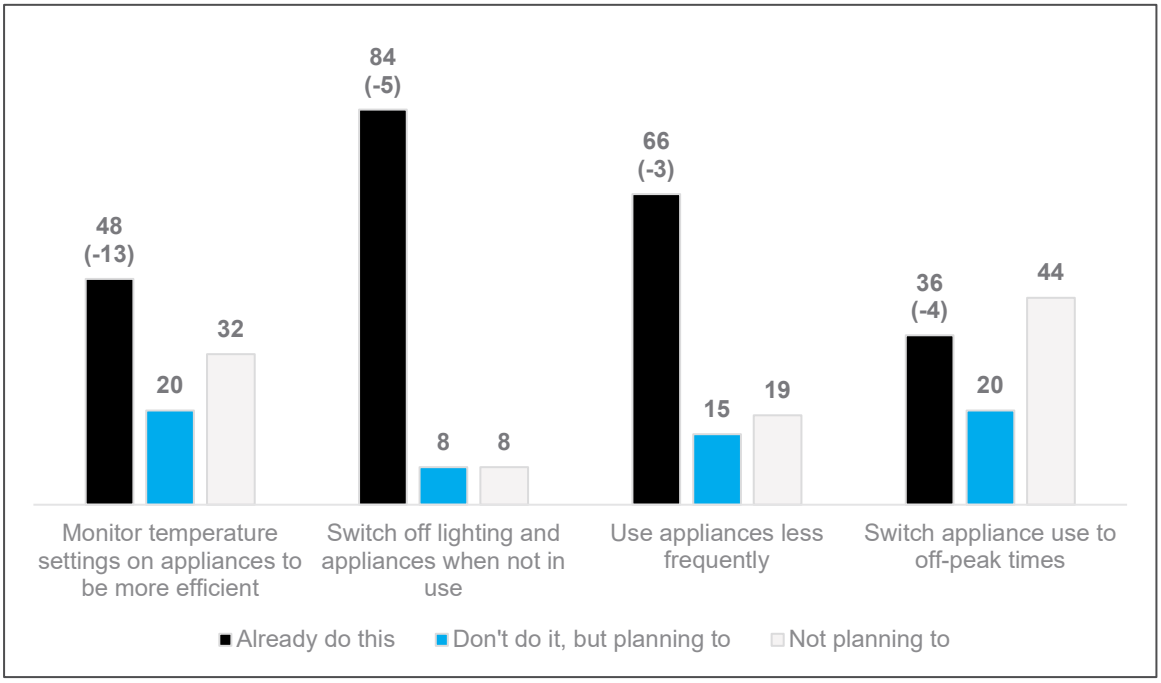
Activity

Energy saving practices

This survey shows a lower appetite for reducing energy usage among Victorian consumers compared with the December 2017 survey, though most still say they are doing a range of activities to manage their energy use and costs.

- 48% say they monitor temperature settings on appliances to be more efficient (down 13% since December 2017).
- A majority say they switch off lighting and appliances when not in use (down 5% to 84%) and that they are using appliances less frequently (down 3% to 66%).

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



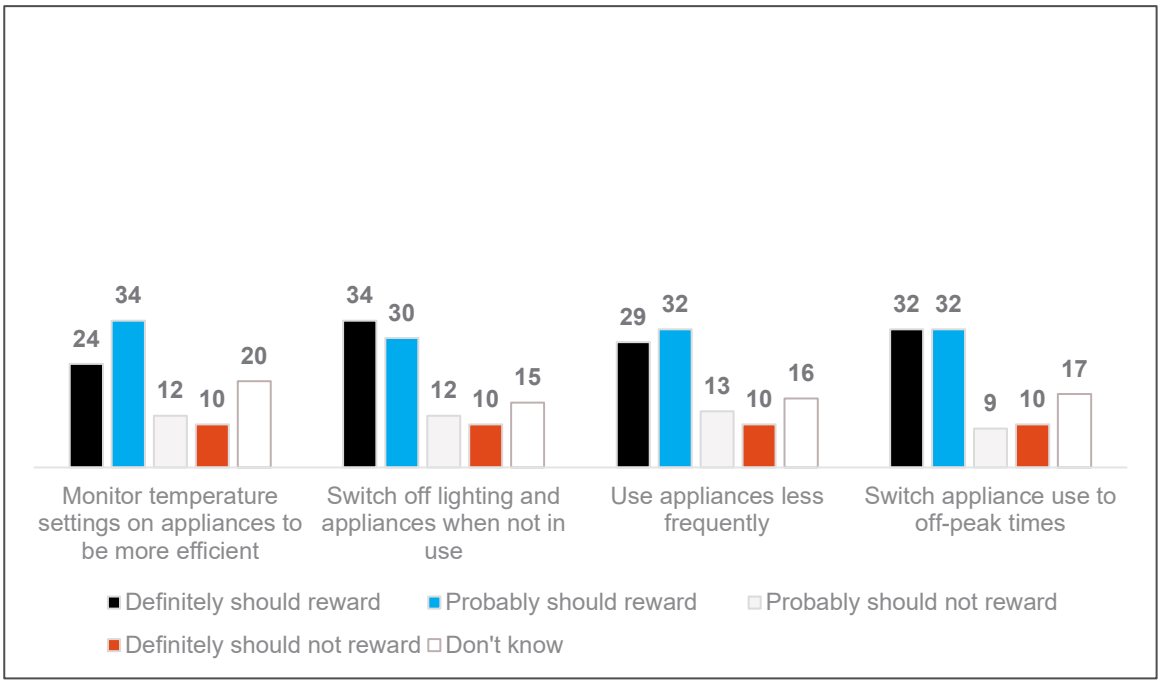
Activity

Reward for reducing energy use

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

- 64% think customers should be rewarded for switching appliance use to off-peak times.
- 64% think customers should be rewarded for switching off lighting and appliances when not in use.
- 61% think customers should be rewarded for using appliances less frequently.
- 58% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.

Should electricity companies do more to financially reward customers who do the following:



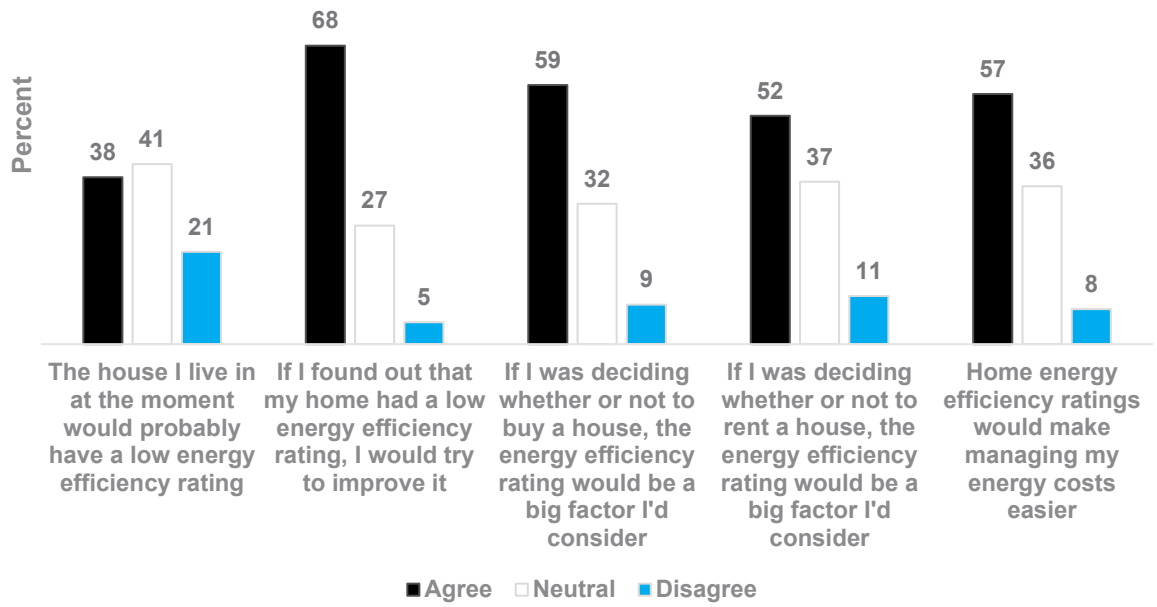
Activity

Housing energy efficiency

Most Victorian consumers are interested in the energy efficiency of their home.

- 68% said they would try to improve their home's energy rating if they found out it had a low rating.
- 59% said that an energy rating would be a big factor they would consider when buying a house.
- 52% said that an energy rating would be a big factor they would consider when renting a house.
- 57% said that a home energy efficiency rating would make managing their energy costs easier.
- The largest proportion (41%) are neutral as to whether their home would have a low energy rating or not.

Do you agree or disagree with the following?

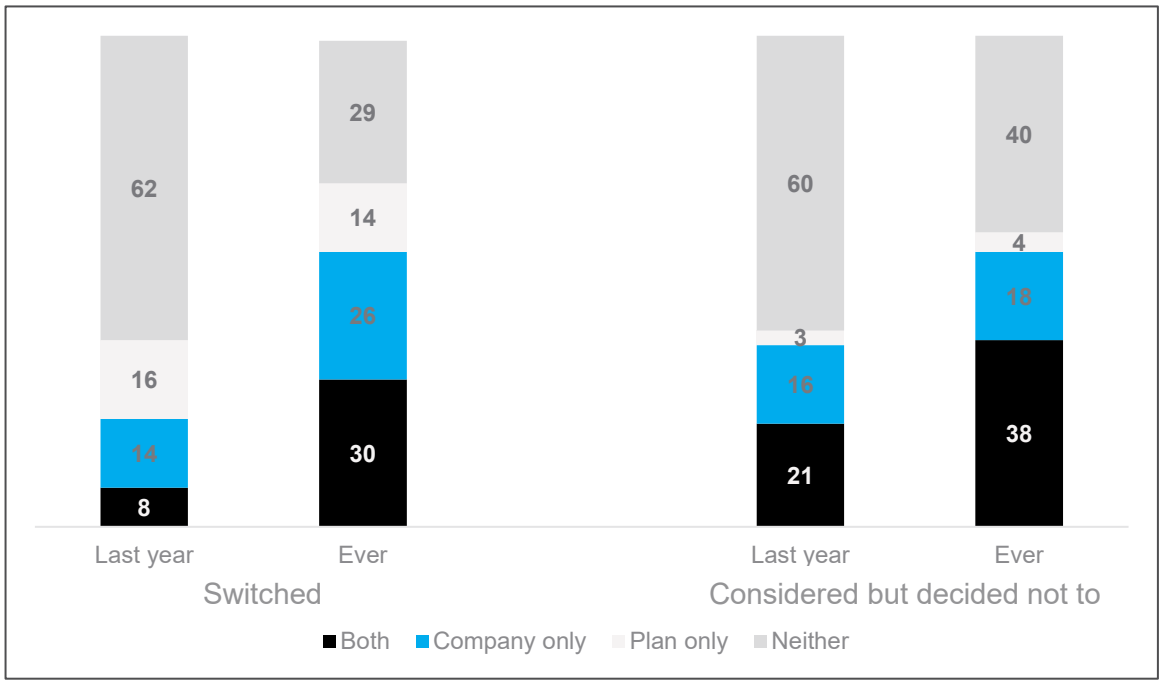


Switching behaviour

A majority of Victorian consumers have switched energy companies at some point in the past.

- 70% say they have switched energy companies or plans in the past (38% in the last year). 29% have never switched.
- 60% say they have previously considered switching energy companies or plans but decided not to (40% in the last year).

Which of the following have you done?



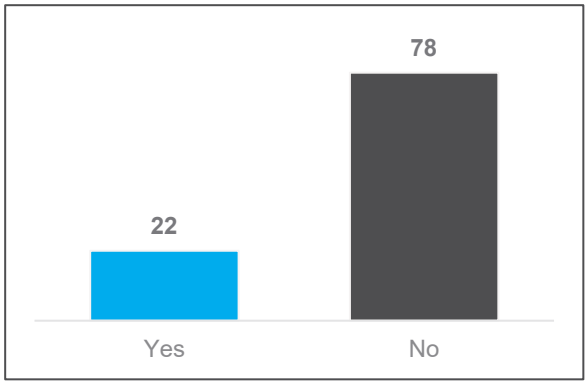
Activity

Reasons for considering switching

Many Victorians are using price comparison websites when looking at switching and low value for money was the biggest driver to shop around for a better deal.

- 41% of those who have looked at switching energy companies or plans said that they searched for a better price on a price comparison website when doing so.
- Of those who had looked at switching energy companies, 33% said they were dissatisfied with the value for money outcome they were receiving.
- 22% of all Victorian household consumers say they intend to switch in the next year.

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



Base: All consumers (n=402)

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

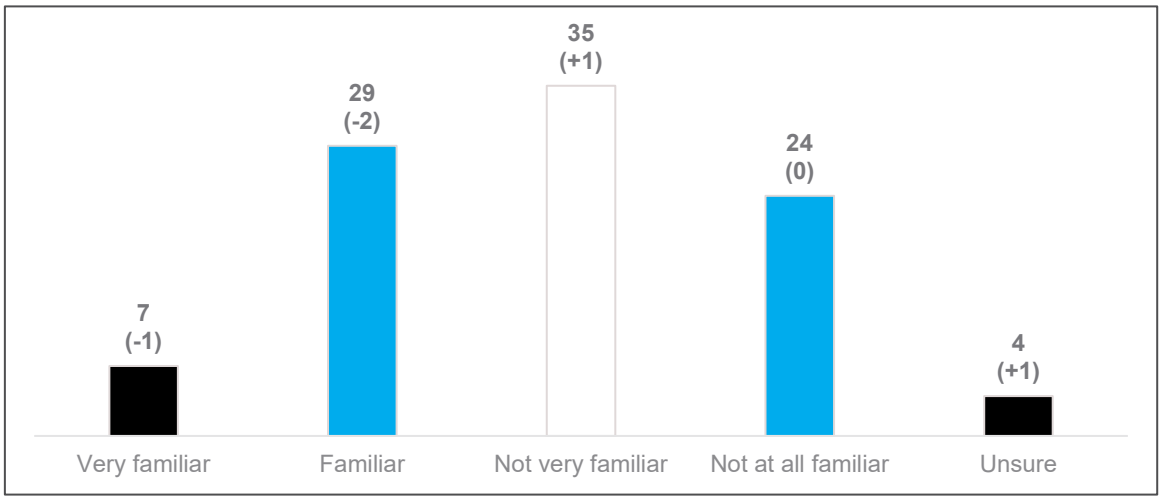
Base: Consumers who have switched or looked at switching in the past (n=294)

Other

Awareness of the Energy Ombudsman

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

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



Queensland

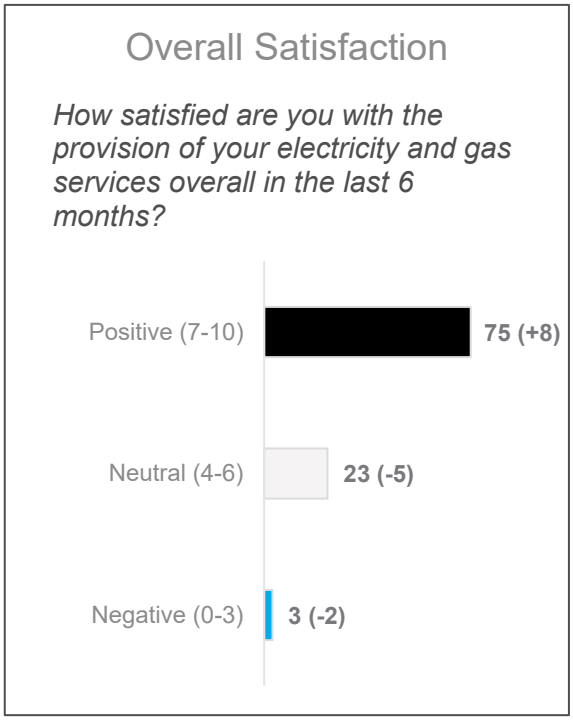
Overall satisfaction

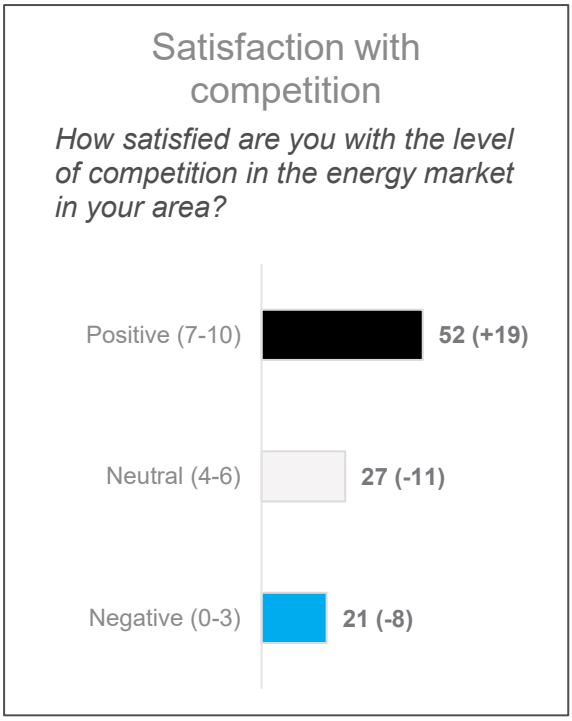
The proportion of Queensland household consumers satisfied with the provision of electricity and gas services overall has increased since December 2017.

- 75% are satisfied, up 8% since last year's survey.

Satisfaction with levels of competition has increased markedly.

- 52% now say they are satisfied with the level of competition in their area, an increase of 19%.





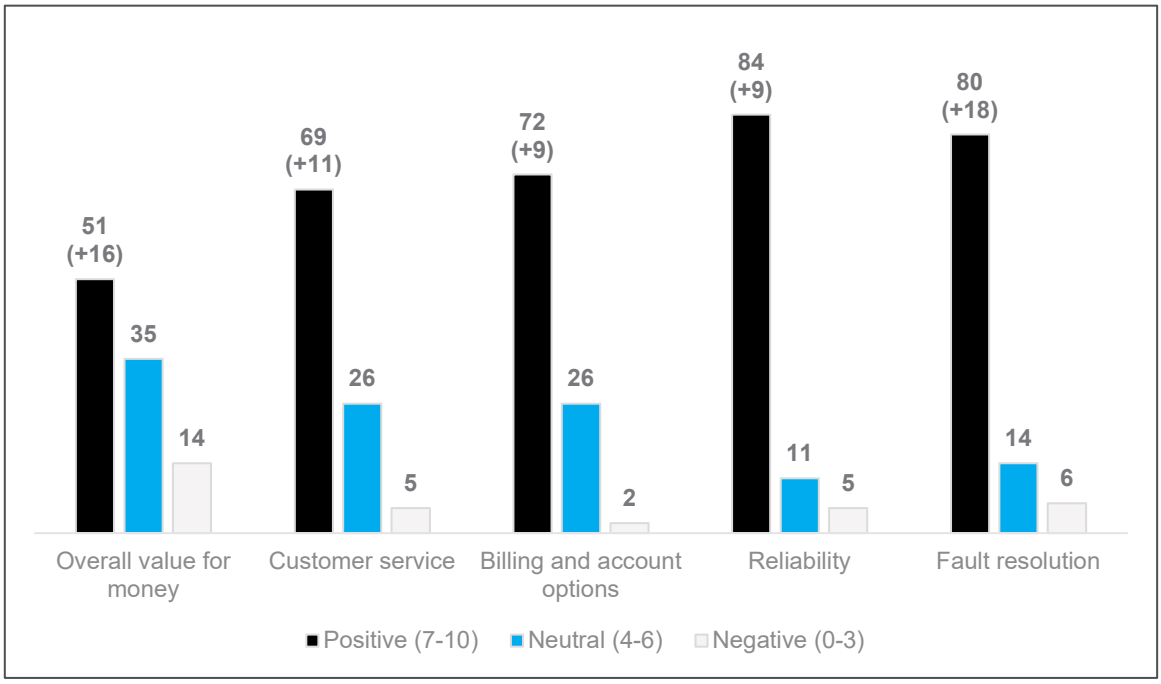
Satisfaction with electricity

Satisfaction with electricity services has sharply increased across all measures for Queensland household consumers since December 2017.

The following measures had double-digit increases:

- Fault resolution (up 18% to 80%).
- Overall value for money (up 16% to 51%).
- Customer service (up 11% to 69%).

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

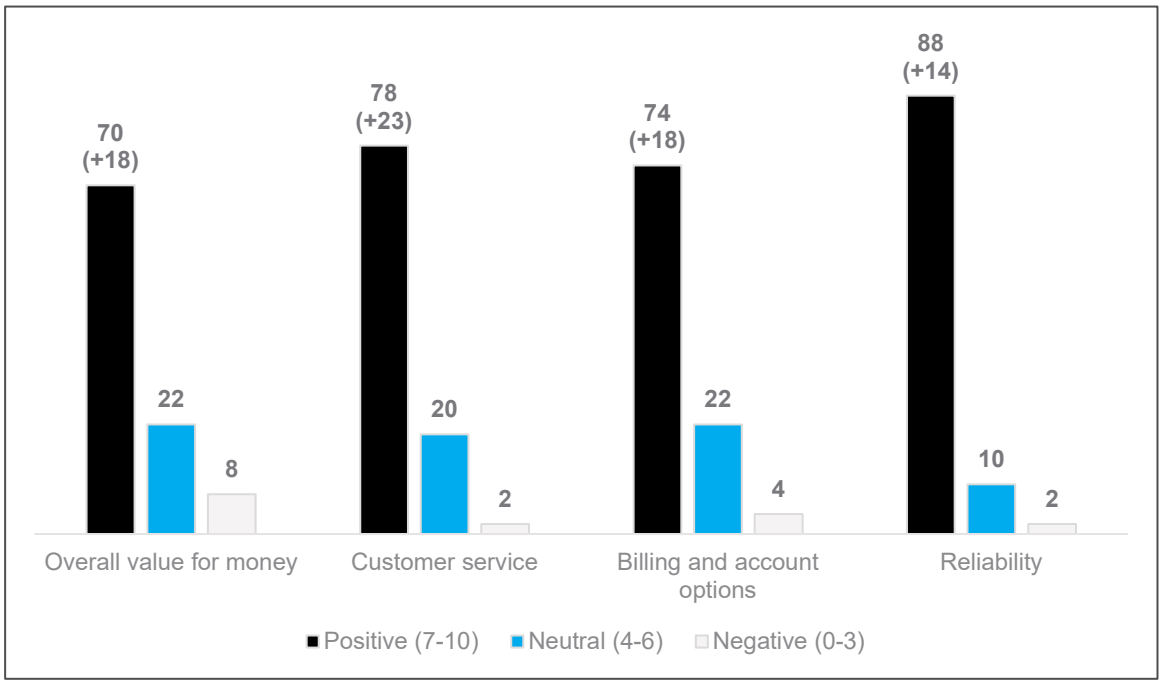


Satisfaction with gas

Satisfaction with each gas-related measure has increased sharply.

- 78% say they are satisfied with the customer service provided by their gas supplier (up 23%).
- 74% now say they are satisfied with their billing and account options (up 18%).
- 70% now say they are satisfied with the overall value for money of their gas service (up 18%).
- 88% say they are satisfied with the reliability of their gas service (up 14%).

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



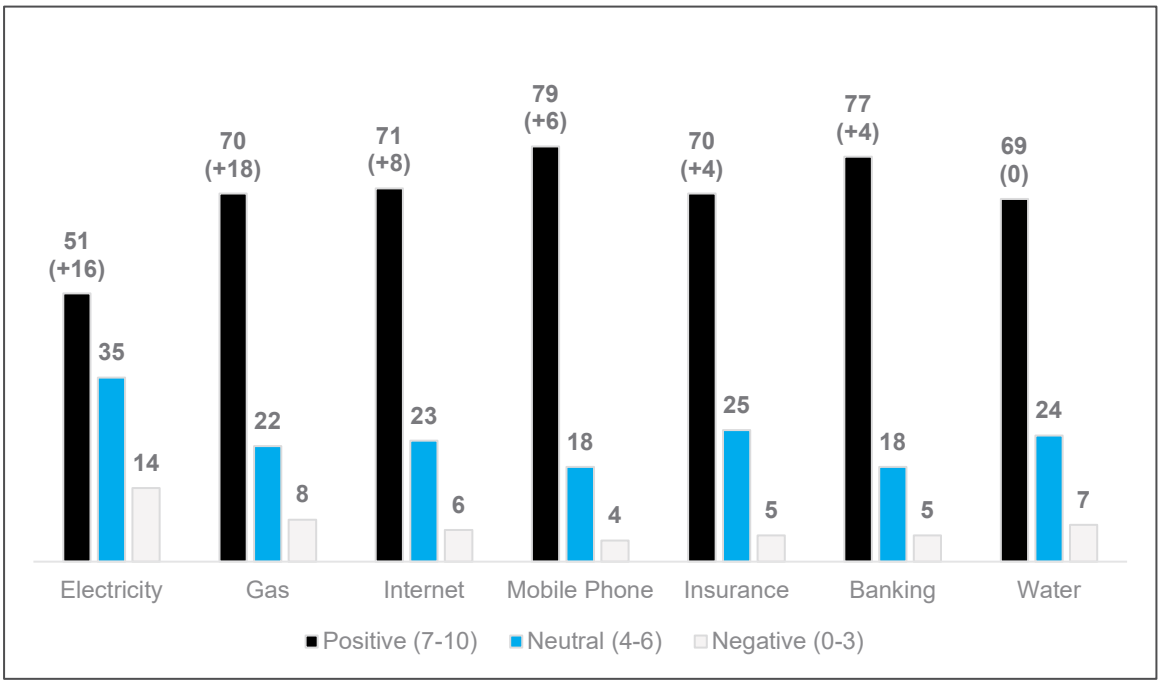
Base: Queensland consumers with gas (n=101)

Satisfaction with utilities and services

Satisfaction with value for money among Queensland household consumers is up for most services, but more substantially for electricity and gas.

- While satisfaction with electricity continues to trail that of other utilities, an increase of 16% to 51% means that a majority are now satisfied with the value for money of all utilities.
- An increase in satisfaction of 18% to 70% in value for money for gas means it is now seen as better value for money than water (69%) and equal to insurance (70%).

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?

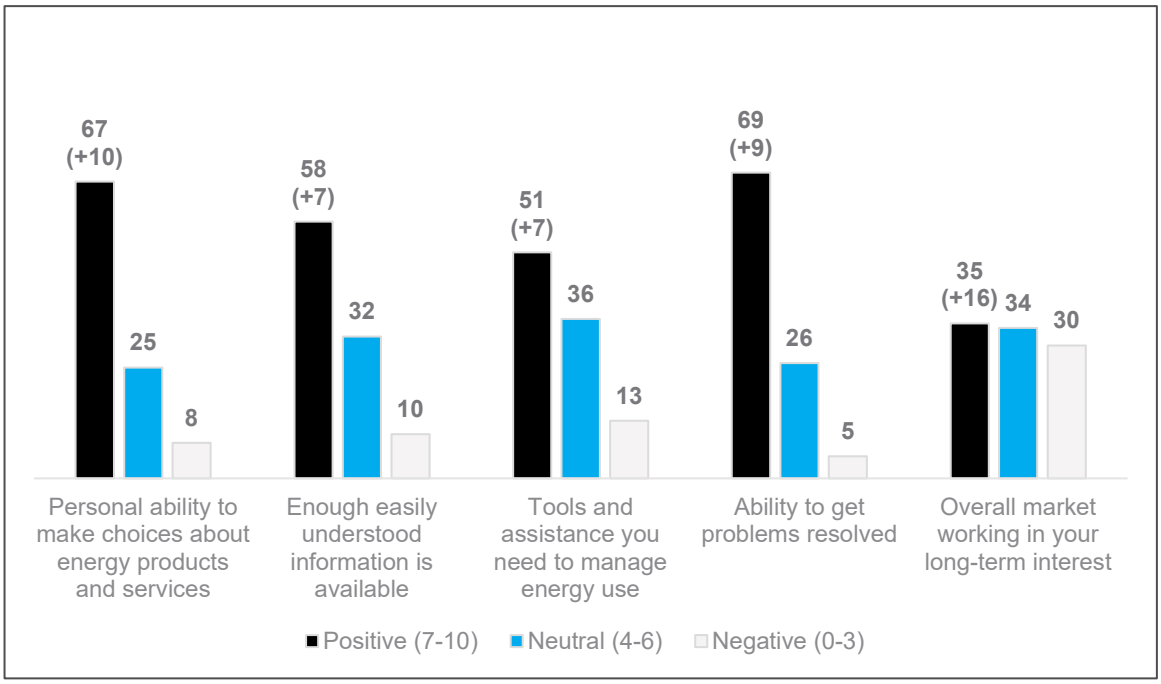


Confidence in information, tools and a working market

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

- The largest increases were in the overall market working in consumers' long-term interests (up 16% to 35%) and personal ability to make choices about energy products and services (up 10% to 67%).

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



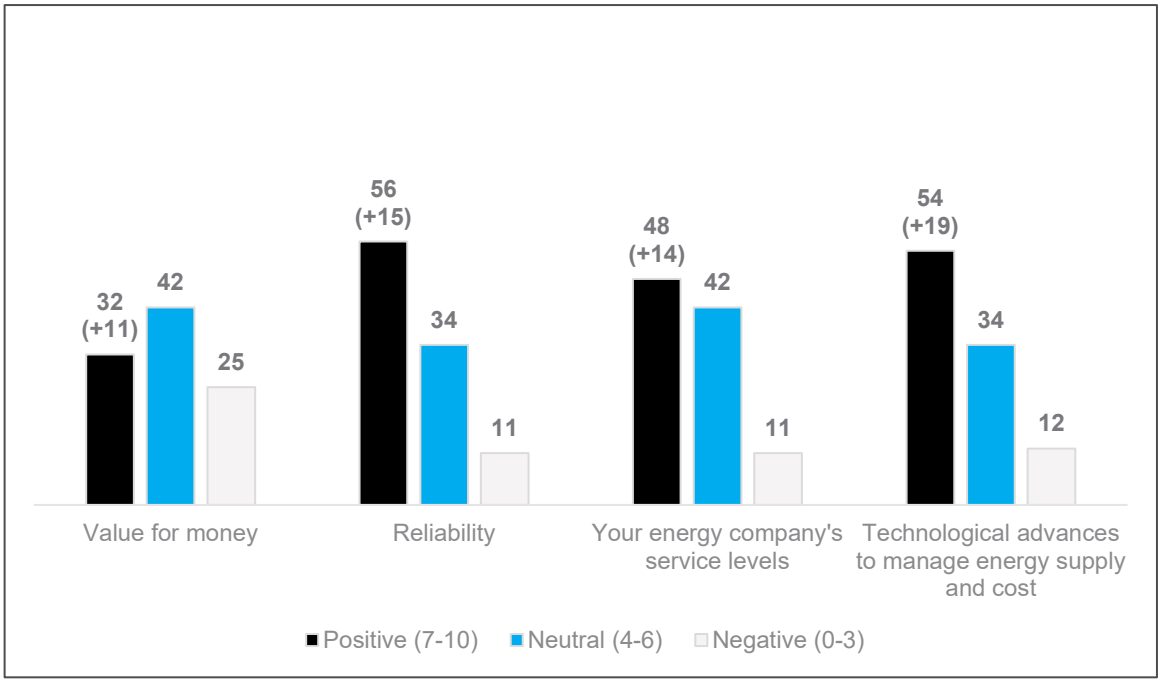
Confidence in long term outcomes

Confidence in long term outcomes has increased by double-digit margins for all measures.

- The proportion of Queensland household consumers saying they are confident that future technological advances will improve their ability to manage their energy use and costs is up 19% to 54%.
- The proportion confident of a more reliable services in the future is up 15% to 56%.
- The proportion confident they will see better service levels in the future is up 14% to 48%.
- The proportion confident of better value for money outcomes in the future is up 11% to 32%.

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'

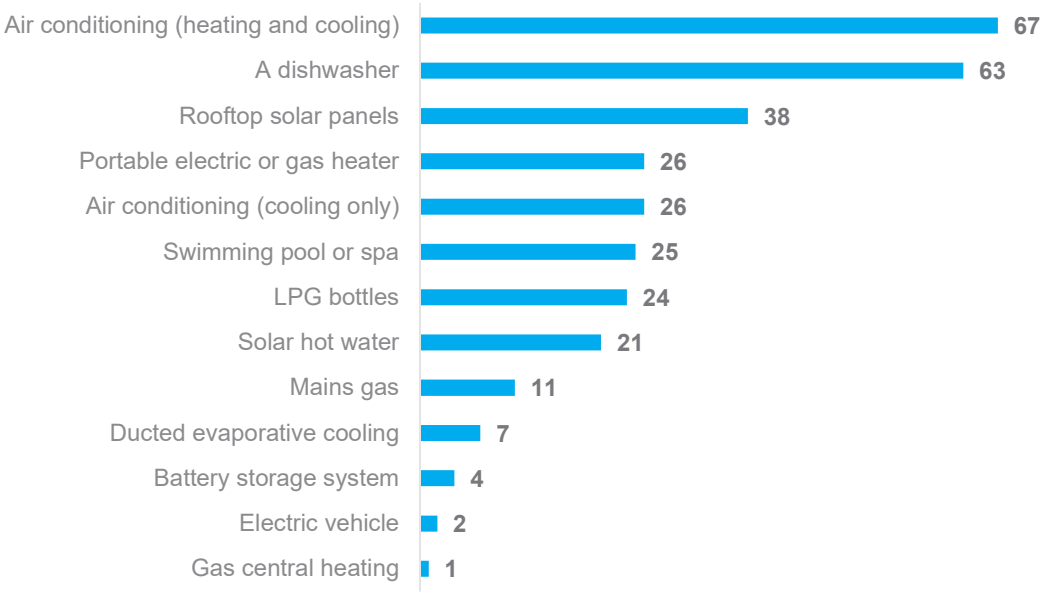


Use of technologies

Queensland household consumers in this survey are among the most likely to have rooftop solar (2nd behind South Australia) and / or solar hot water (2nd behind Western Australia).

- A total of 19% say they have a smart/digital meter and 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?

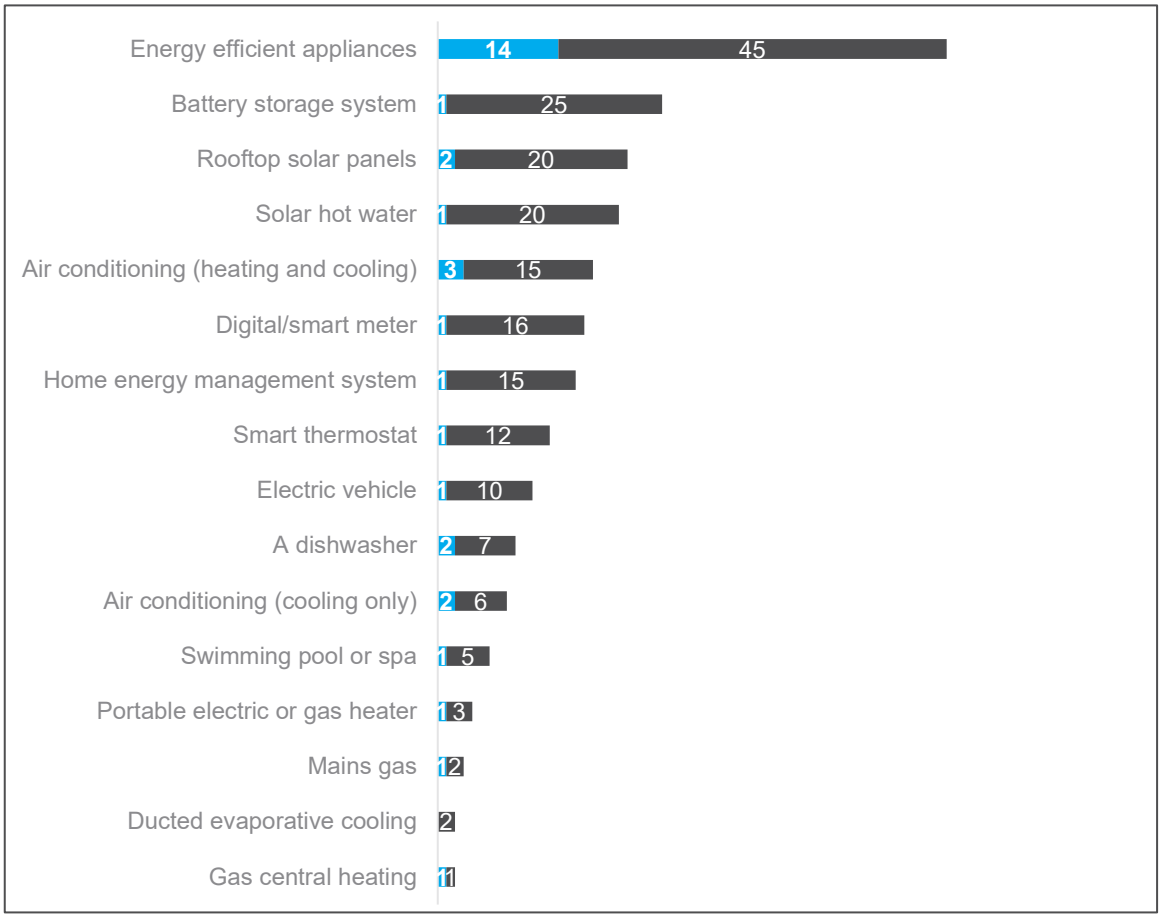
Activity

Uptake of technologies

Except for energy efficient appliances, few Queensland households intend to purchase any of the listed technologies in the next 12 months.

- 59% say that they are considering purchasing energy efficient appliances, and 14% plan to do so in the next 12 months.

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



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

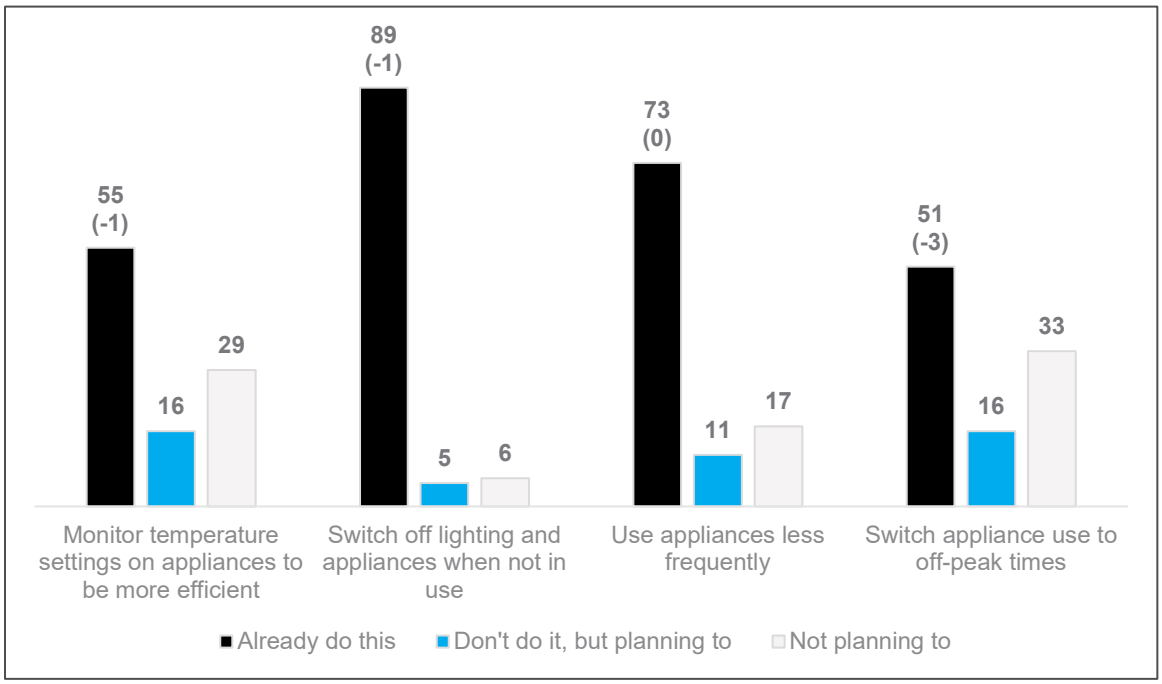
Activity

Energy saving practices

A majority of Queensland household consumers are already doing each of the listed practices.

- The most common energy savings practices are switching off lights and appliances when not in use (down 1% to 89%) and using appliances less frequently (unchanged at 73%).

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



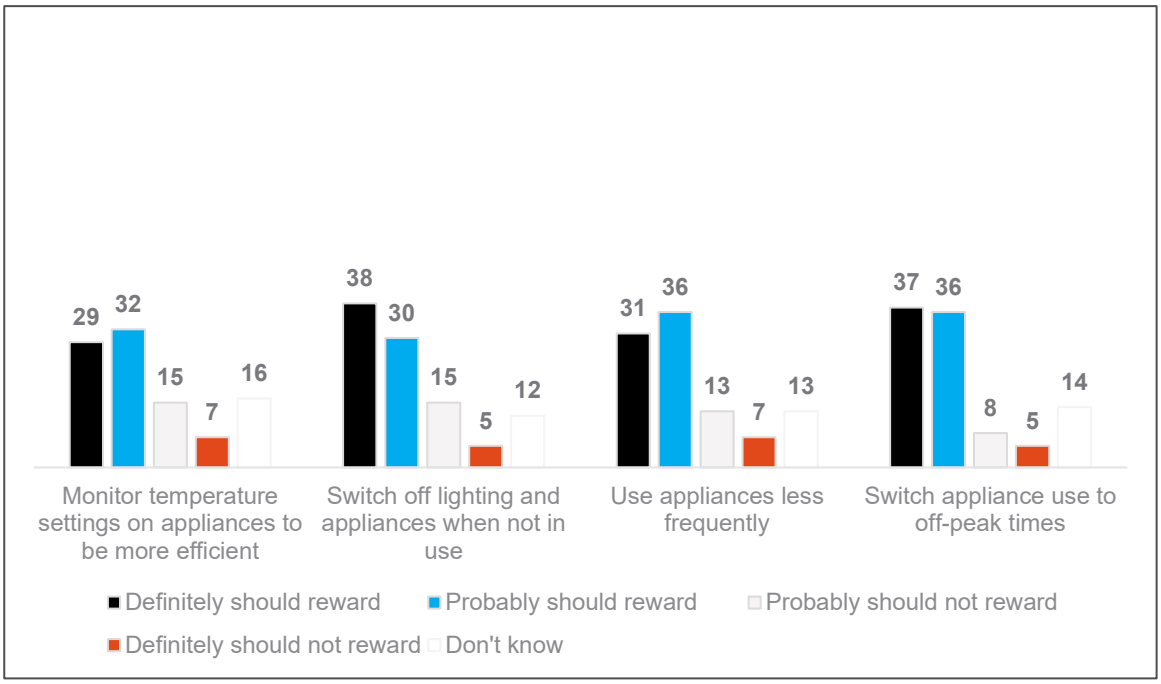
Activity

Reward for reducing energy use

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

- 73% think customers should be rewarded for switching appliance use to off-peak times.
- 68% think customers should be rewarded for switching off lighting and appliances when not in use.
- 67% think customers should be rewarded for using appliances less frequently.
- 61% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.

Should electricity companies do more to financially reward customers who do the following:



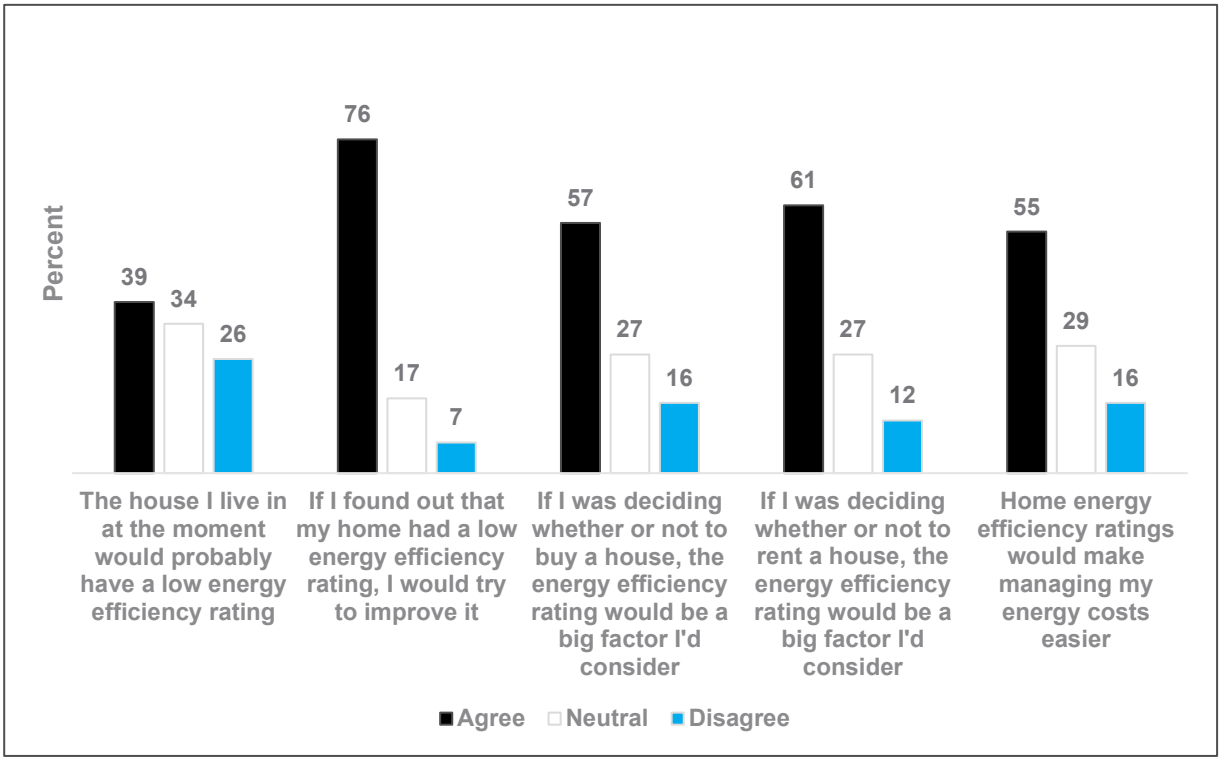
Activity

Housing energy efficiency

A large number of Queensland consumers think their home would have a low energy efficiency rating.

- 76% said they would try to improve their home's energy rating if they found out it had a low rating.
- 61% said that an energy rating would be a big factor they would consider when renting a house.
- 57% said that an energy rating would be a big factor they would consider when buying a house.
- 55% said that a home energy efficiency rating would make managing their energy costs easier.
- 39% of Queensland consumers believe the house they currently live in would have a low energy rating, while 34% are neutral.

Do you agree or disagree with the following?

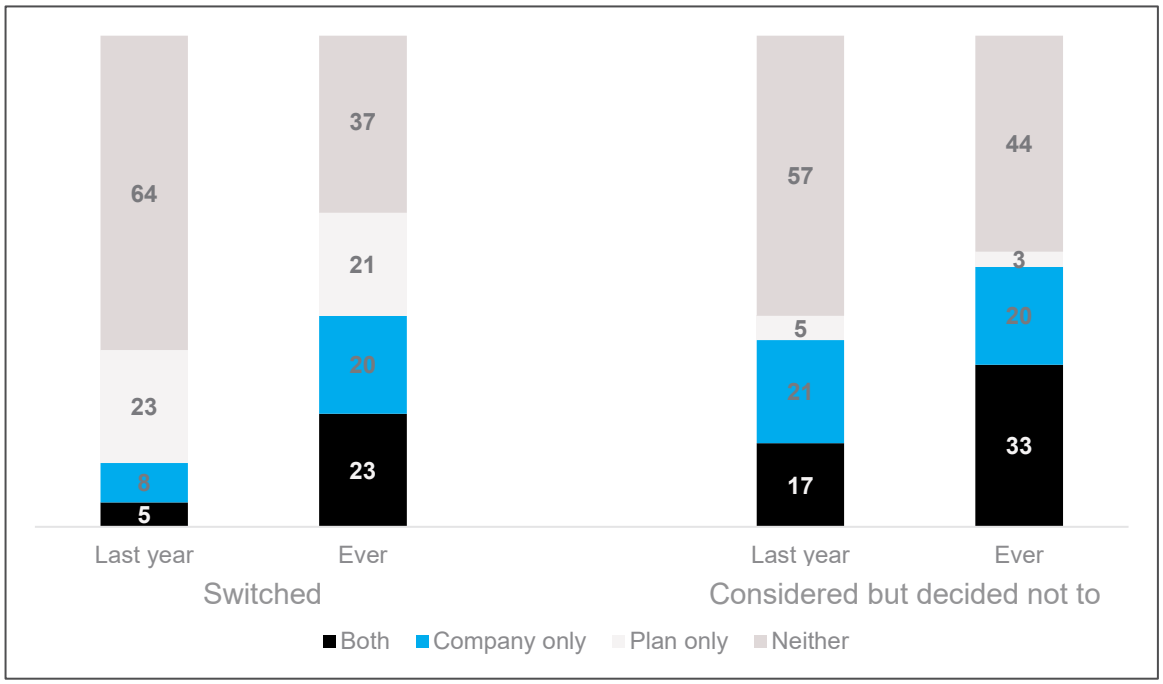


Switching behaviour

Over half of Queenslanders who have ever switched companies or plans have done so in the past year.

- 64% say they have switched energy companies or plans in the past (36% in the last year). 37% say they have never switched.
- 56% say they have previously considered switching energy companies or plans but decided not to (43% in the last year).

Which of the following have you done?



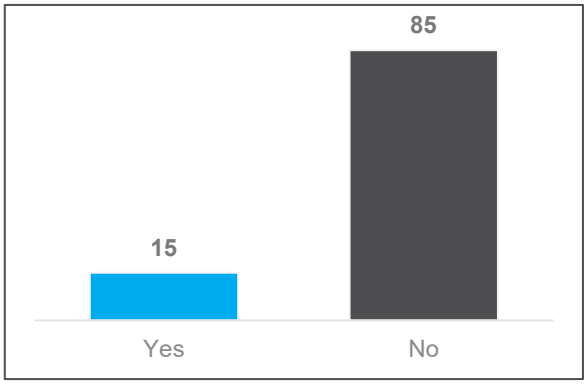
Activity

Reasons for considering switching

Dissatisfaction with value for money is the most common reason given for considering switching.

- 34% of those who have considered switching say they weren't satisfied with the value for money of their previous energy company.
- 15% of all Queensland household consumers (and 17% of those in South East Queensland) say they intend to switch energy companies or plans in the next year.

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



Base: All consumers (n=302)

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

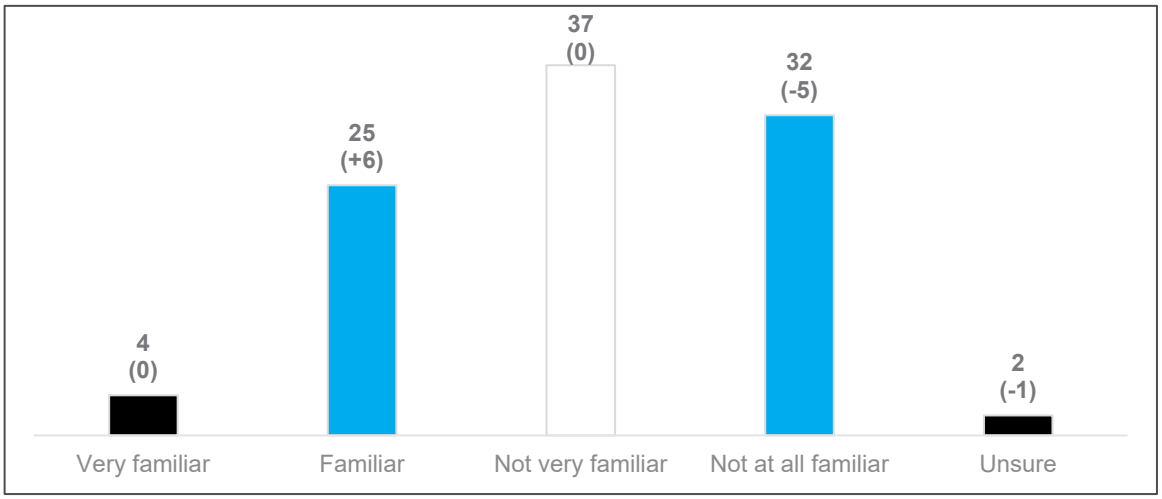
Base: Consumers who have switched or looked at switching in the past (n=202)

Other

Awareness of the Energy Ombudsman

29% say they are familiar with the Energy Ombudsman in Queensland.

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



South Australia

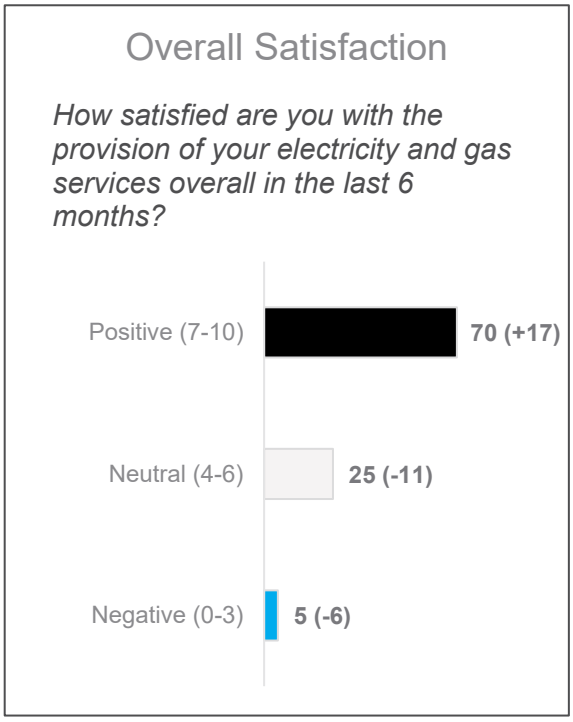
Overall satisfaction

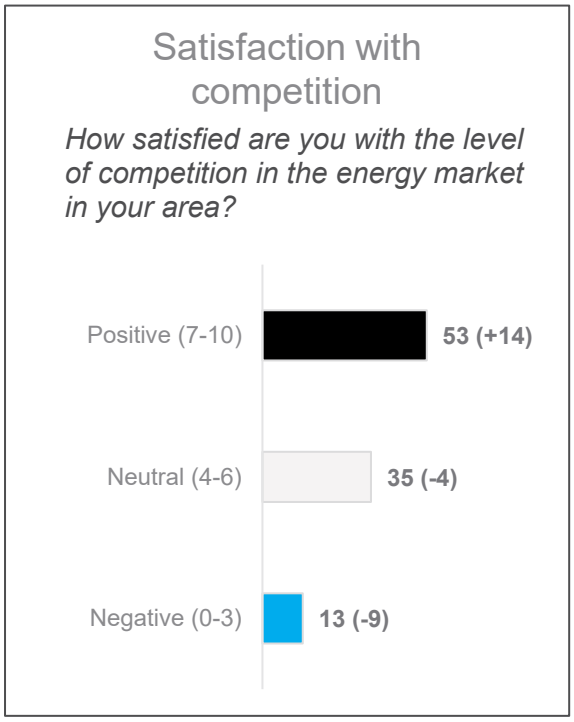
Overall satisfaction has increased substantially among South Australian household consumers.

- 70% say they are satisfied, up 17% since December 2017.

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

- The proportion of those satisfied with the competition in the energy market increased by 14% to 53%.



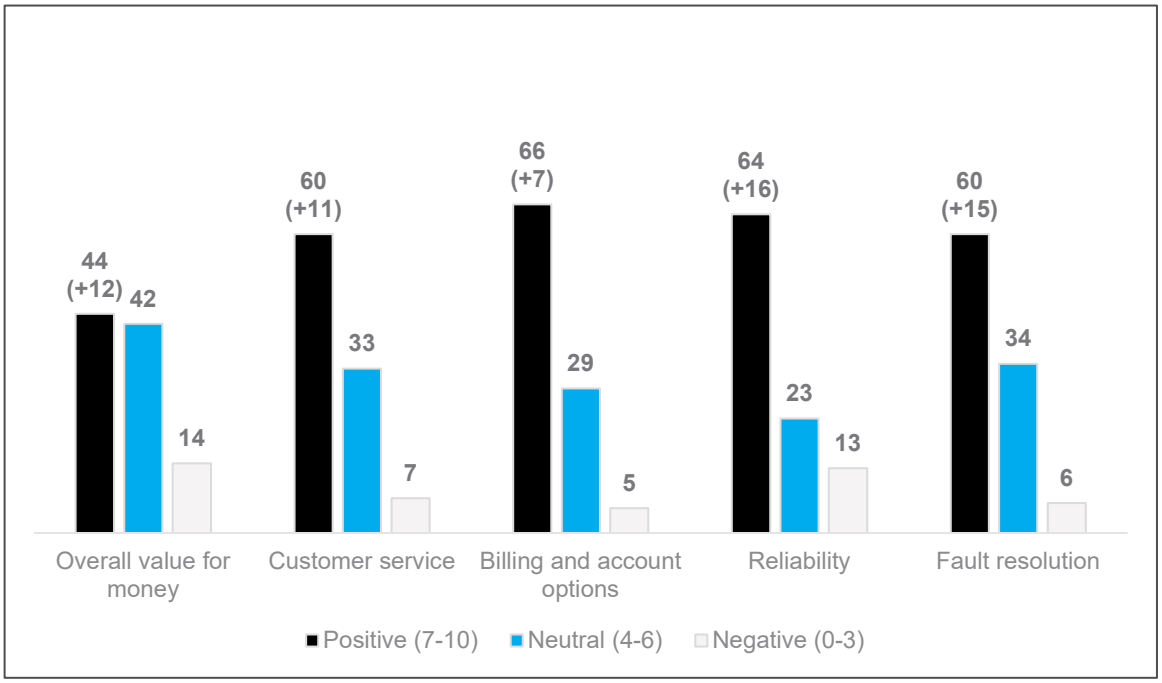


Satisfaction with electricity

Satisfaction with all measures relating to electricity has increased.

- The largest increases were for reliability (up 16% to 64%) and fault resolution (up 15% to 60%), likely reflecting the length of time that has passed since the 2016 blackouts.
- There were also double-digit increases in satisfaction for overall value for money (up 12% to 44%) and customer service (up 11% to 60%).

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

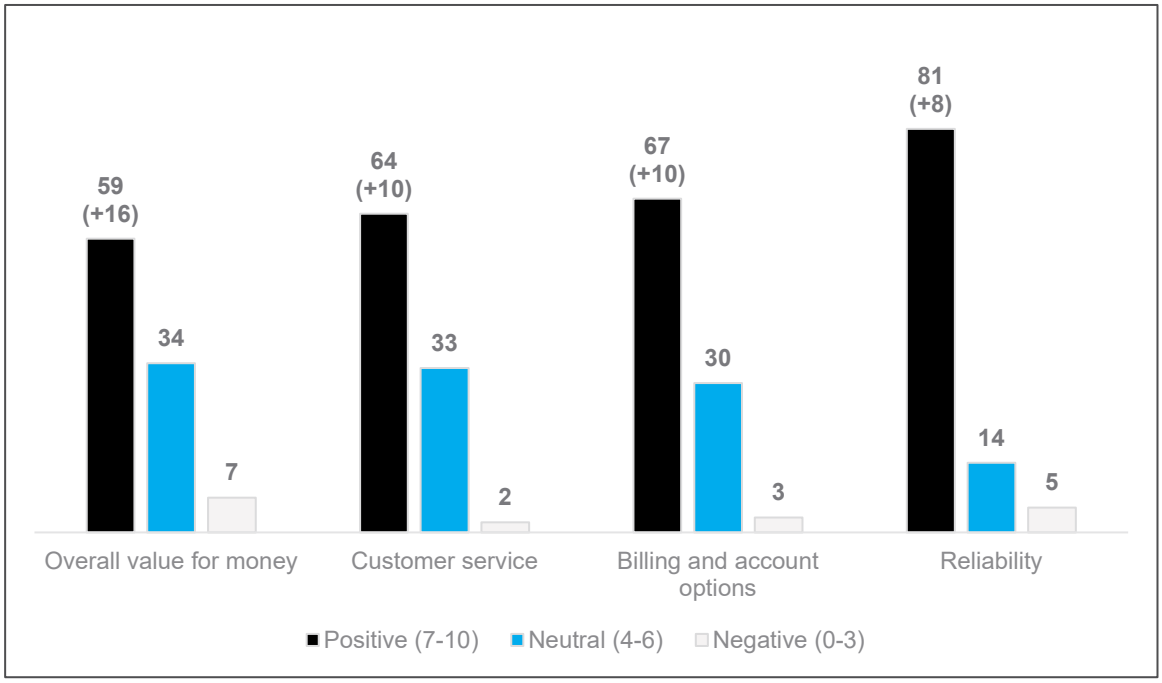


Satisfaction with gas

Satisfaction with gas services has increased across all measures.

- 59% of South Australian household consumers who have gas are satisfied with the overall value for money of their gas services, up 16% from December 2017.
- 64% are satisfied with the customer service of their gas services, up 10%.
- 67% are satisfied with their billing and account options, up 10%.
- 81% are satisfied with the reliability of their gas services, up 8%.

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



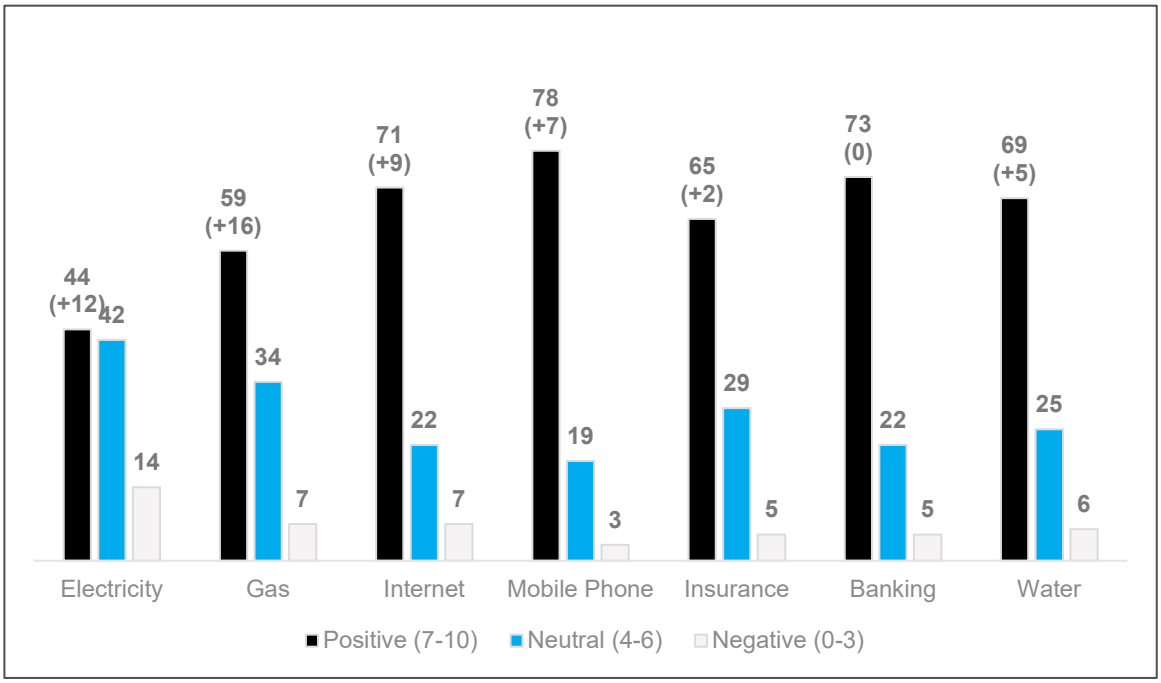
Base: South Australia consumers with gas (n=248)

Satisfaction with utilities and services

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

- Electricity (up 12% to 44%) and gas (up 16% to 59%) had the largest increases in satisfaction for value for money.
- The only utility for which satisfaction did not increase was banking, which was unchanged (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?

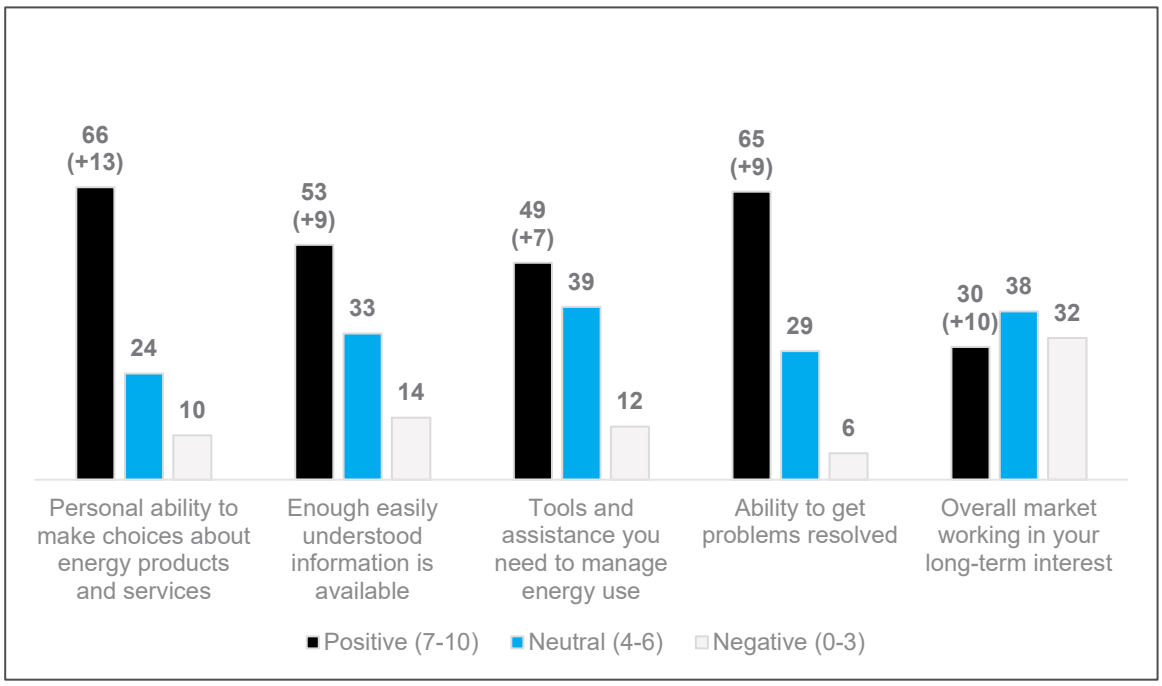


Confidence in information, tools and a working market

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

- Consumer confidence in their ability to make choices (66%) and resolve issues (65%) is stronger than their confidence in the information (53%) and tools (49%) available to support their decision making.
- Overall confidence that the market is working in consumers' interests was up from a low base by 10% (to 30%).

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



Confidence in long term outcomes

Confidence that the market will deliver better long term outcomes in the future has increased across all measures.

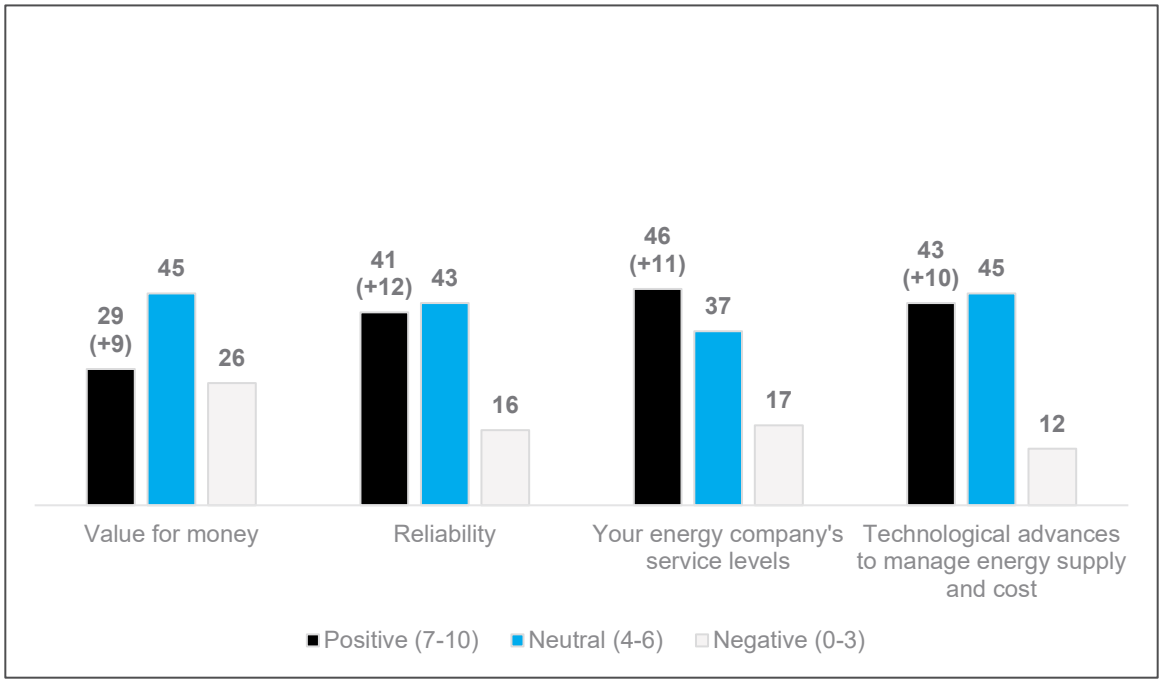
There were double-digit increases in satisfaction on the following measures:

- Reliability (up 12% to 41%).
- Service levels (up 11% to 46%).
- Technological advances to manage energy supply and cost (up 10% to 43%).

Confidence that the market will deliver better value outcomes in the future has increased 9% off a low base (to 29%).

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'

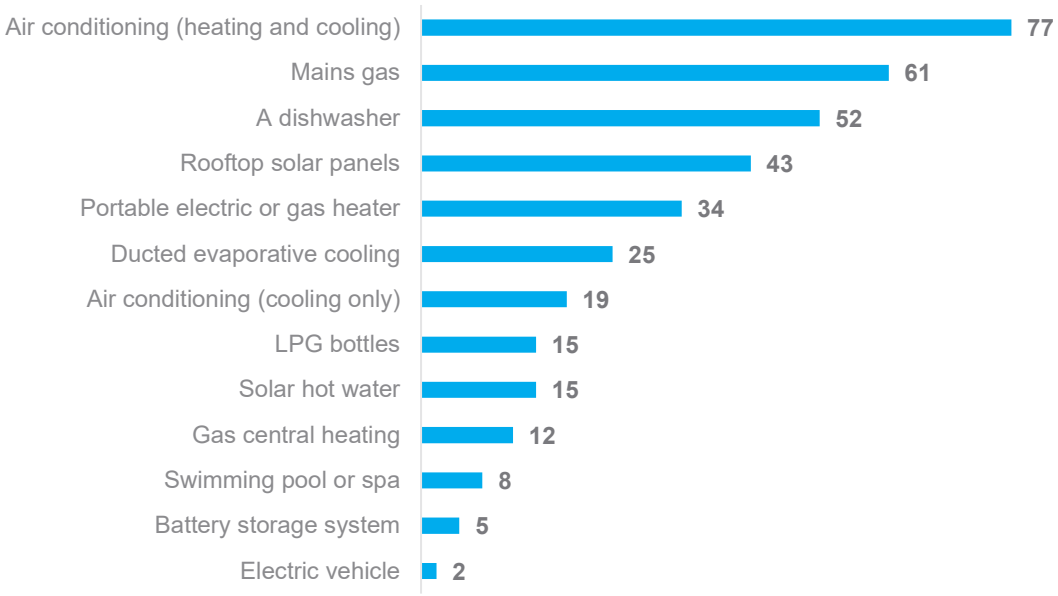


Confidence

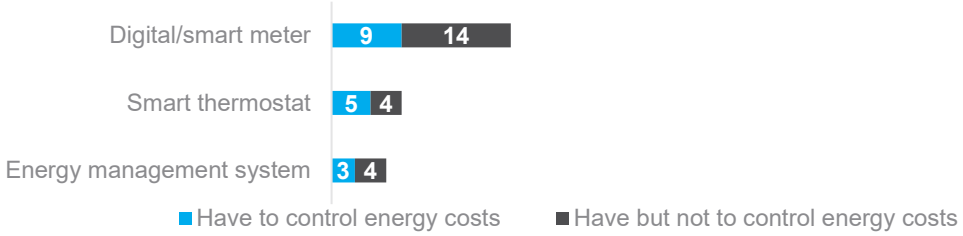
Use of technologies

South Australians in this survey have the highest declared usage of rooftop solar and air conditioning for heating & cooling (equal with Western Australia).

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?



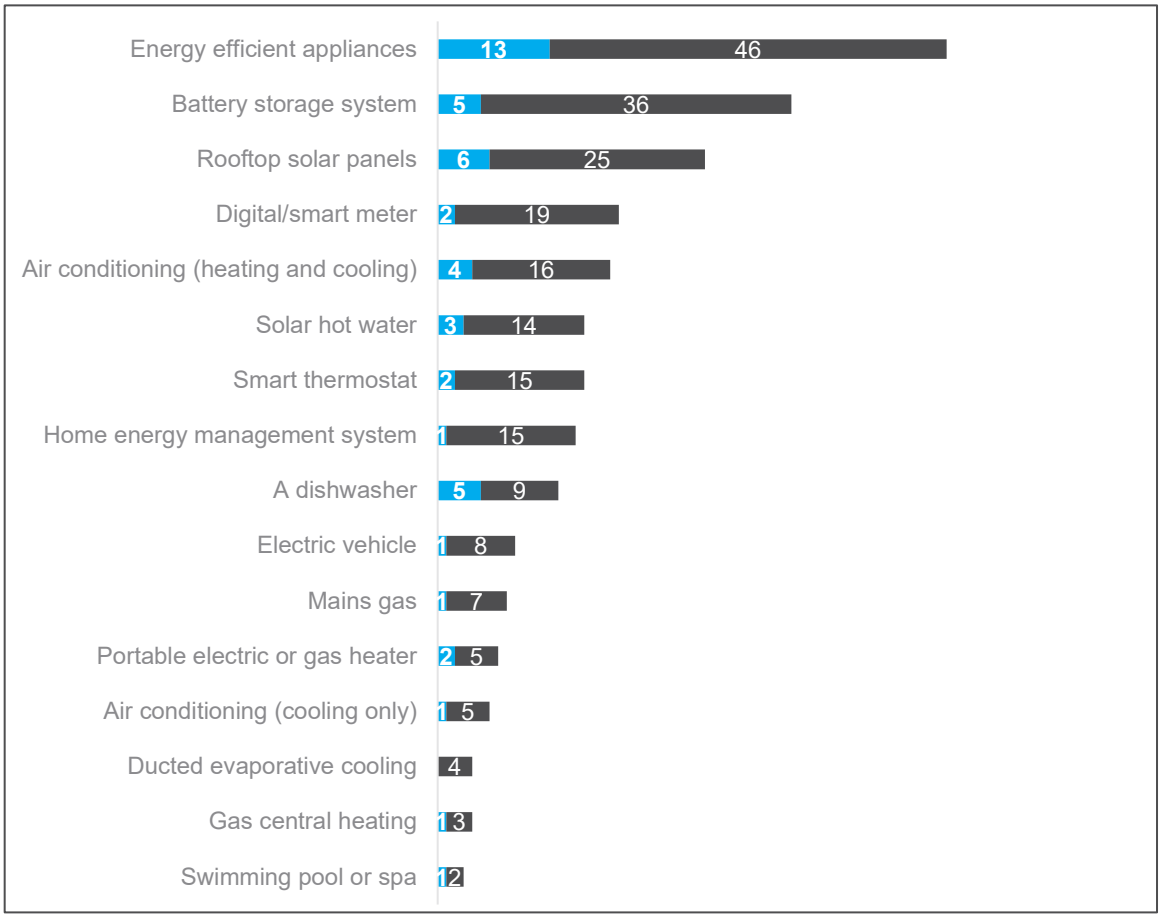
Activity

Uptake of technologies

South Australian household consumers show strong interest in rooftop solar and battery storage.

- 41% say they are considering a battery storage system (and 5% plan to purchase one in the next 12 months).
- 31% of those who do not currently have rooftop solar say they are considering solar panels (and 6% plan to do so in the next 12 months).

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



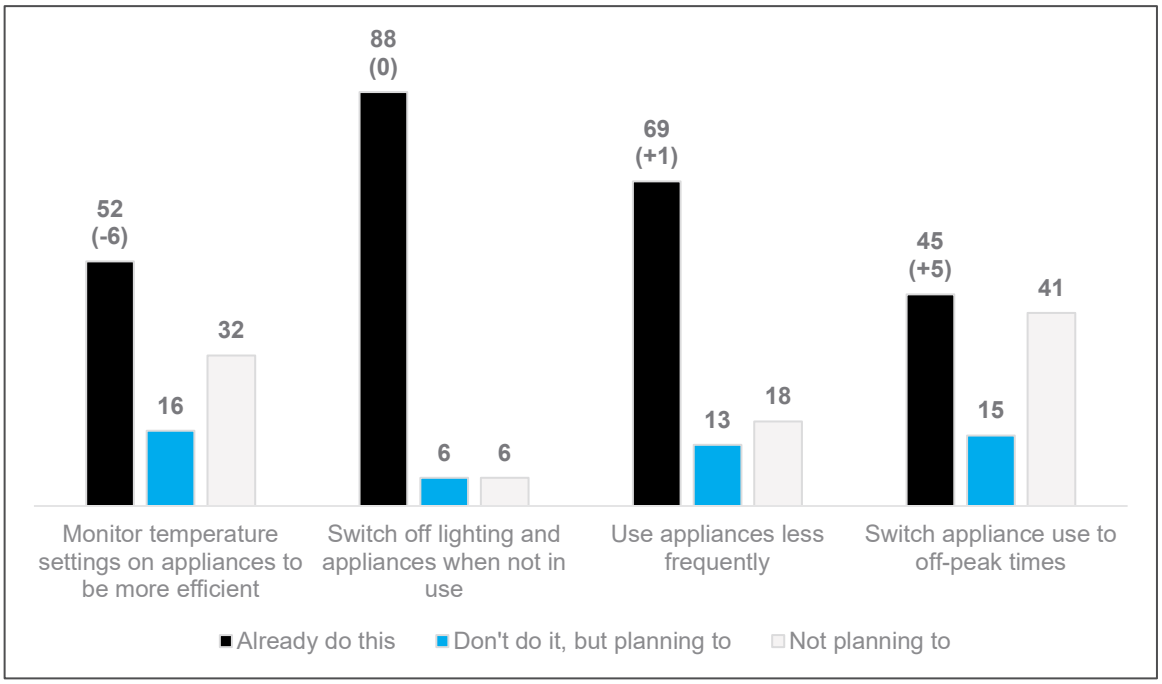
Note: Other than ‘energy efficient appliances’ which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home.

Energy saving practices

South Australian household consumers are already active in managing their energy use.

- 88% say they already switch off lighting and appliances when not in use, and 69% use appliances less frequently.
- 52% say they monitor temperature settings on their appliances.
- 45% say they have already switched appliance use to off-peak times.

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



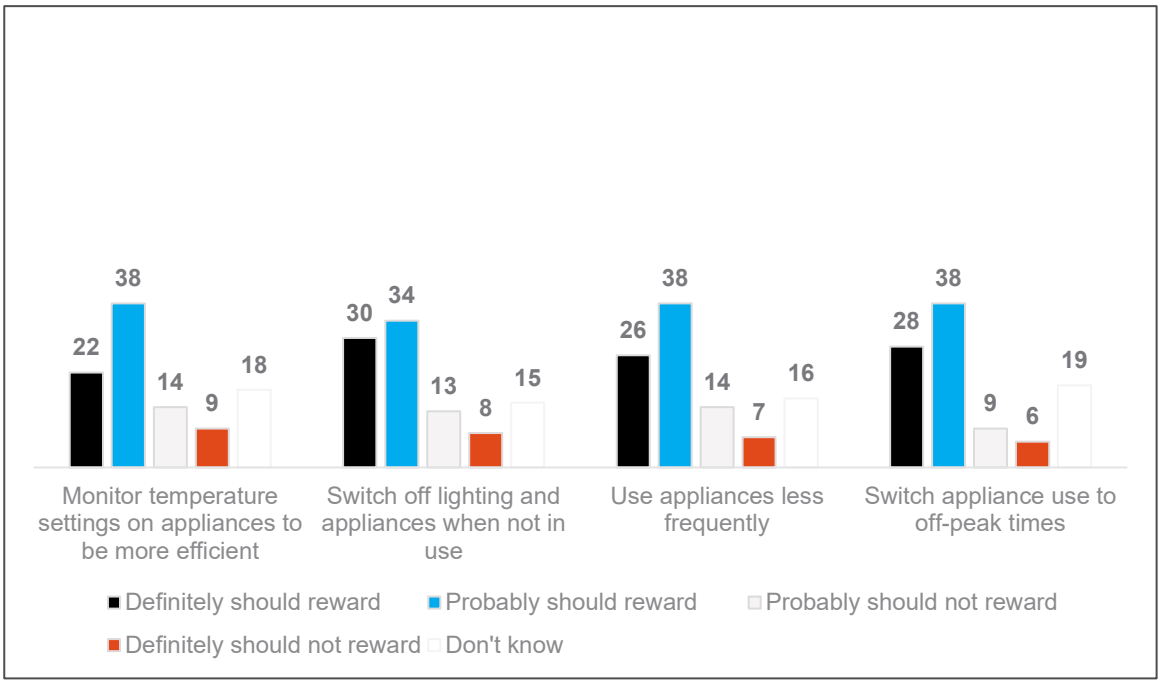
Activity

Reward for reducing energy use

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

- 66% think customers should be rewarded for switching appliance use to off-peak times.
- 64% think customers should be rewarded for switching off lighting and appliances when not in use.
- 64% think customers should be rewarded for using appliances less frequently.
- 60% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.

Should electricity companies do more to financially reward customers who do the following:



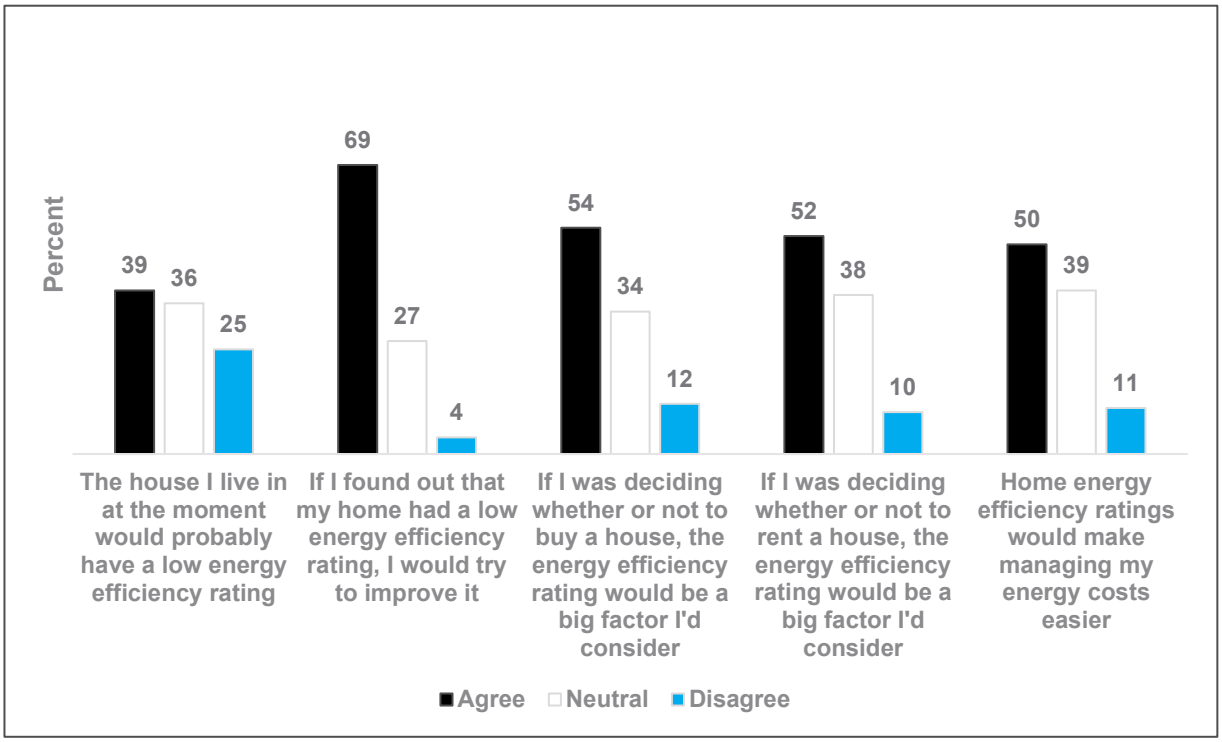
Activity

Housing energy efficiency

Around four in ten South Australian consumers believe their home would be of low energy efficiency.

- 69% said they would try to improve their home's energy rating if they found out it had a low rating.
- 54% said that an energy rating would be a big factor they would consider when buying a house.
- 52% said that an energy rating would be a big factor they would consider when renting a house.
- 50% said that a home energy efficiency rating would make managing their energy costs easier.
- The largest proportion (39%) believe that their house would probably have a low energy efficiency rating, while 36% could not say whether their home was energy efficient.

Do you agree or disagree with the following?

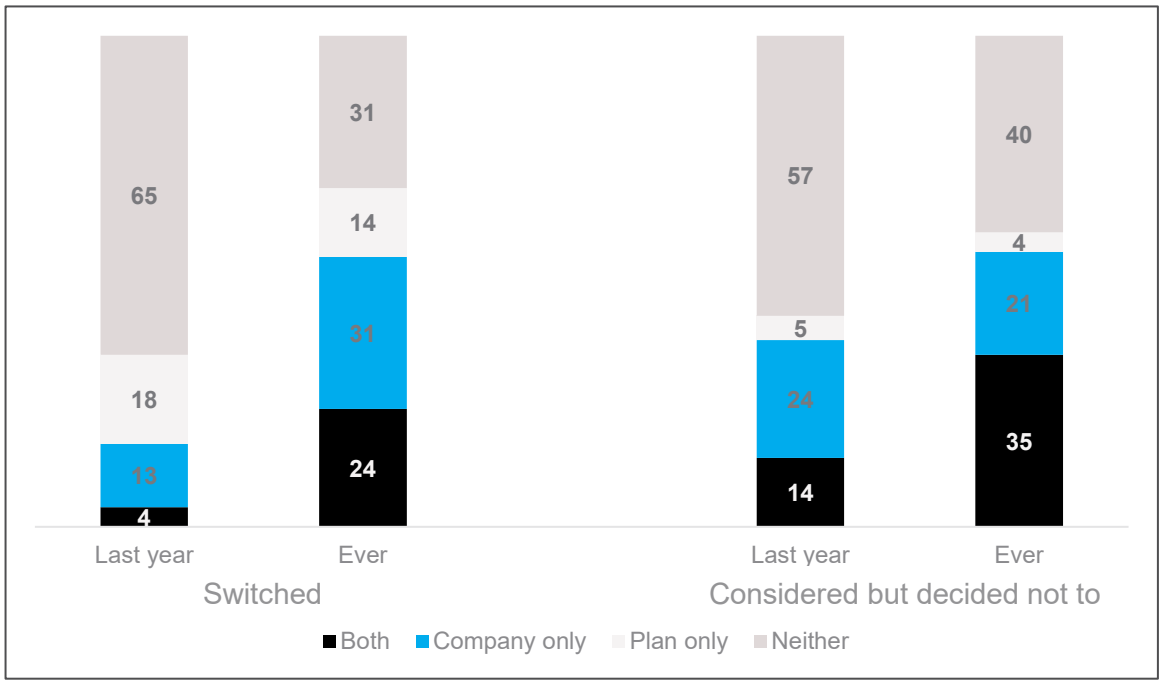


Switching behaviour

A majority of South Australian consumers have switched companies energy companies in the past.

- 69% say they have switched energy companies or plans in the past (35% in the last year). 31% have never switched.
- 60% say they have previously considered switching energy companies or plans but decided not to (43% in the last year).

Which of the following have you done?



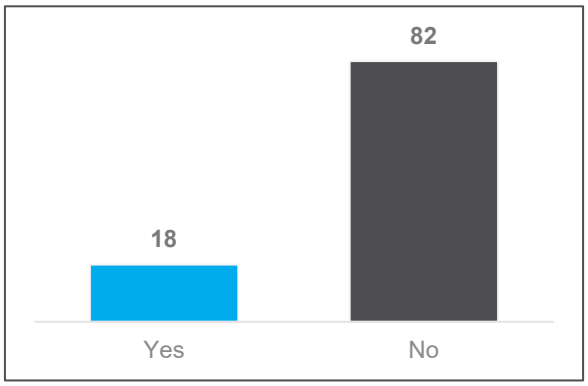
Activity

Reasons for considering switching

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

- 31% of those who switched companies in the last 3 years said they weren't satisfied with the value for money of the service provided by their supplier.
- 31% said they looked at a price comparison website the last time they considering switching.
- 18% plan to switch energy companies or plans in the next year.

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



Base: All consumers (n=301)

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

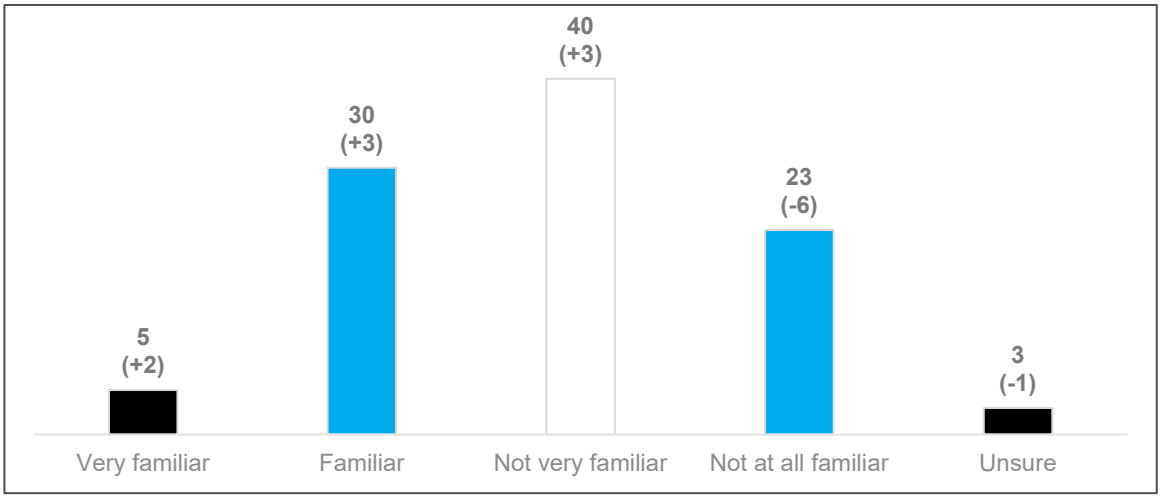
Base: Consumers who have switched or looked at switching in the past (n=218)

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

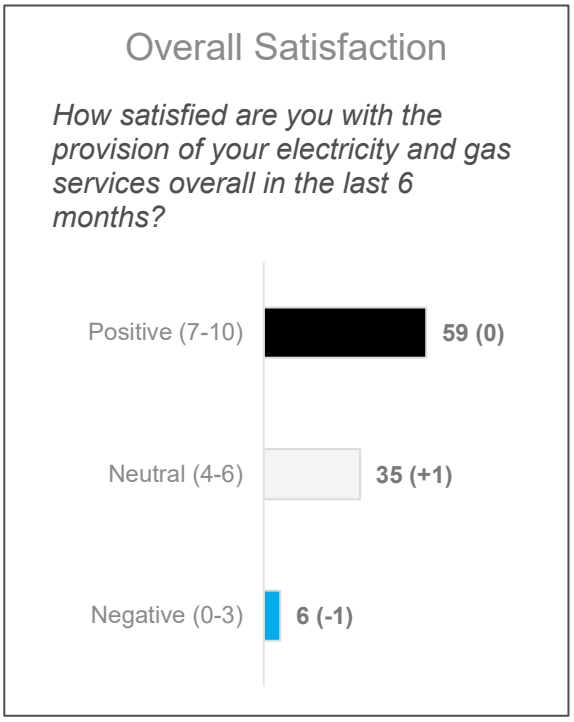
Overall satisfaction

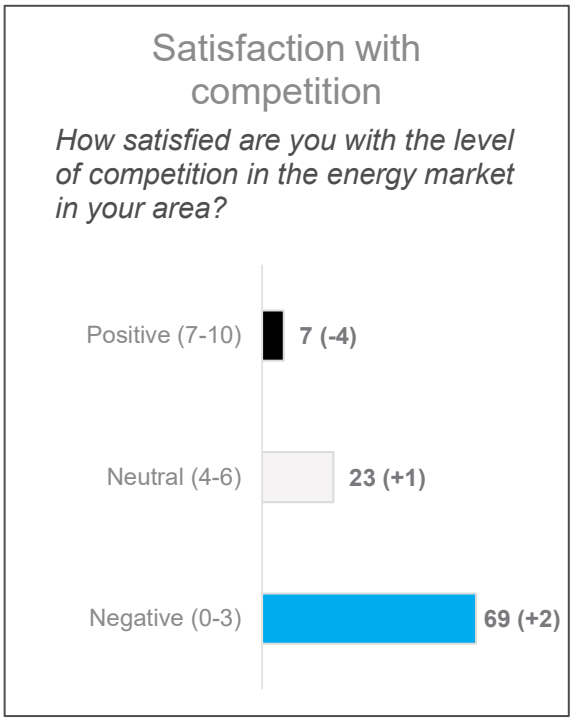
Tasmania is the only state or territory where overall satisfaction with electricity and gas services has not increased since the last survey.

- 59% say they are satisfied, unchanged from December 2017.

Satisfaction with levels of competition in Tasmania remain low.

- 7% say they are satisfied, down 4% from December 2017.



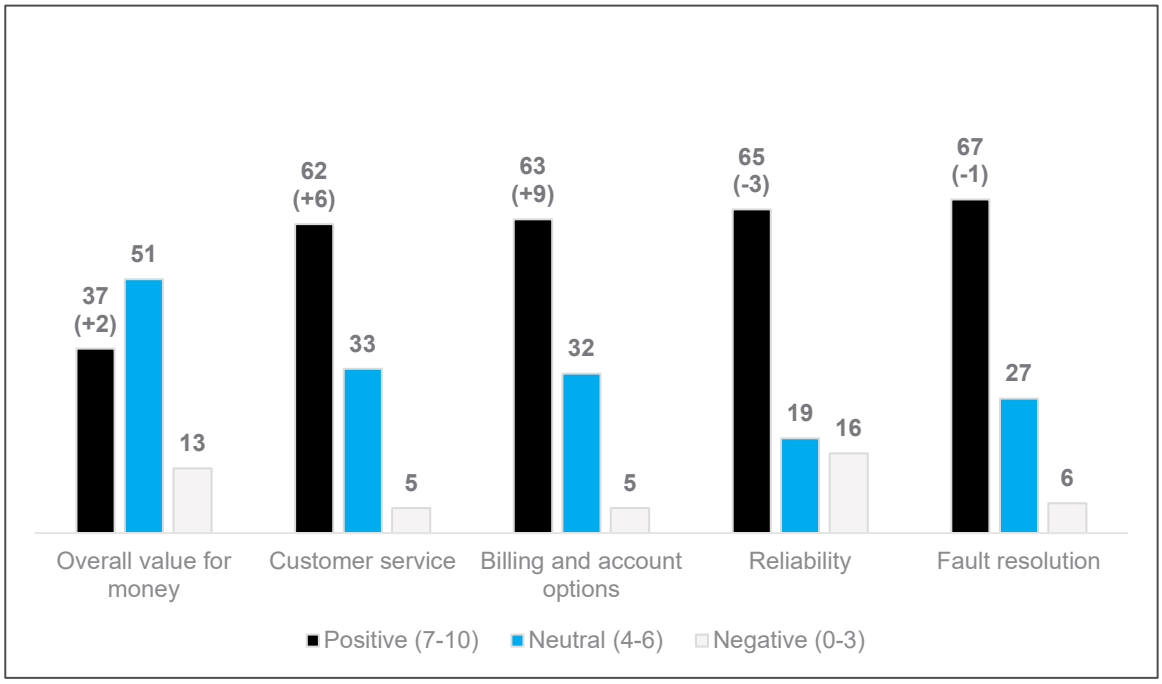


Satisfaction with electricity

With the exception of reliability and fault resolution, satisfaction with electricity has risen in Tasmania.

- 63% of Tasmanian household consumers now say they are satisfied with their billing and account options (up 9%), and 62% are satisfied with customer service outcomes (up 6%).
- Satisfaction with reliability of electricity supply has fallen slightly (down 3% to 65%).
- Satisfaction with value for money outcomes has increased 2% to 37%.

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

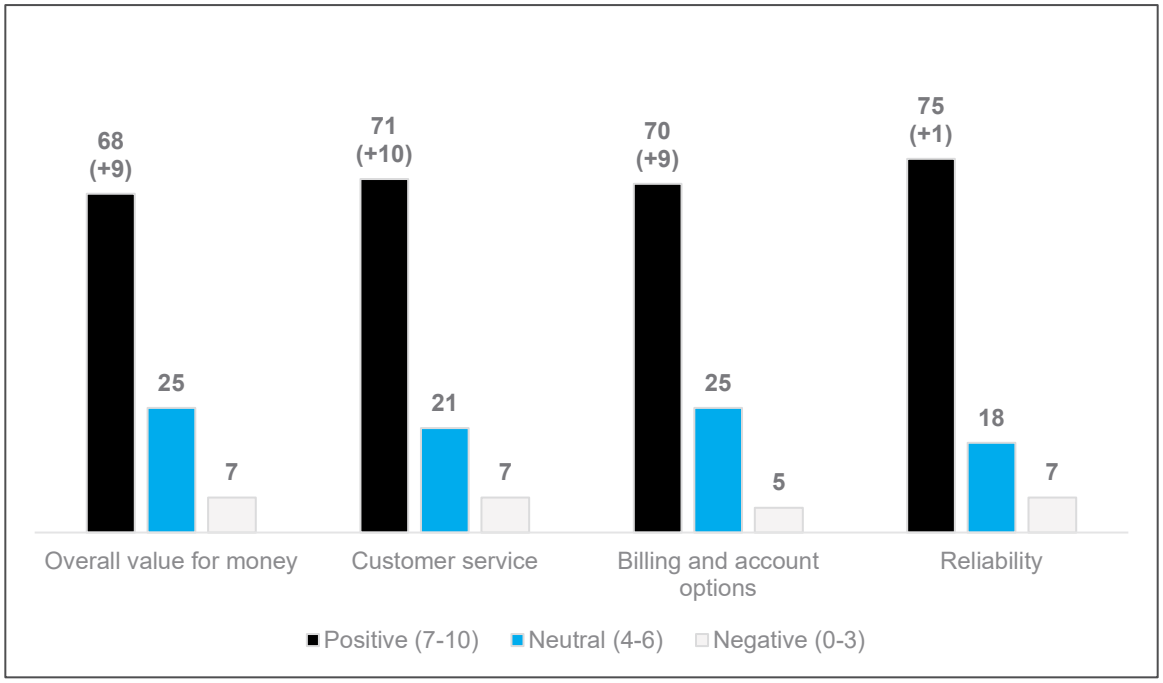


Satisfaction with gas

Tasmanian household gas consumers are more satisfied across all measures.

- 71% are now satisfied with their customer service, up 10% from December 2017.
- 79% are now satisfied with their billing and account options, up 9%.
- 68% are now satisfied with their overall value for money, up 9%.

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



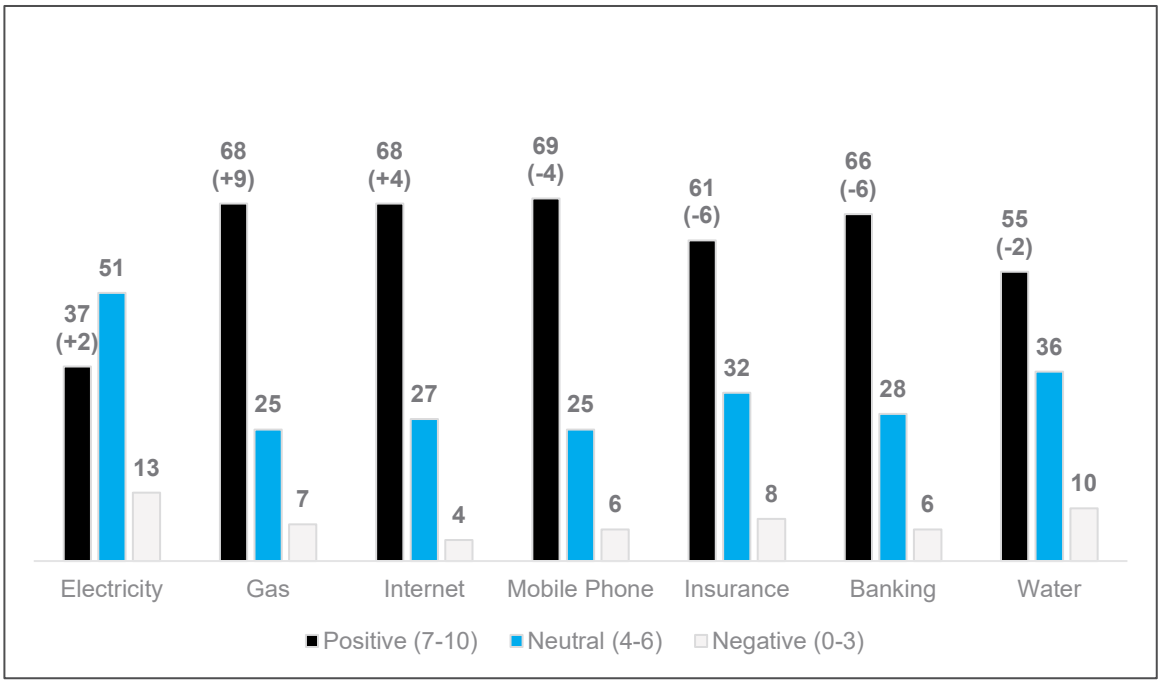
Base: Tasmanian consumers with gas (n=56)
Note: Small sample size – results are indicative only

Satisfaction with utilities and services

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

- While gas is among the utilities with the highest satisfaction level, electricity is still considerably behind other utilities in terms of value for money (37%).

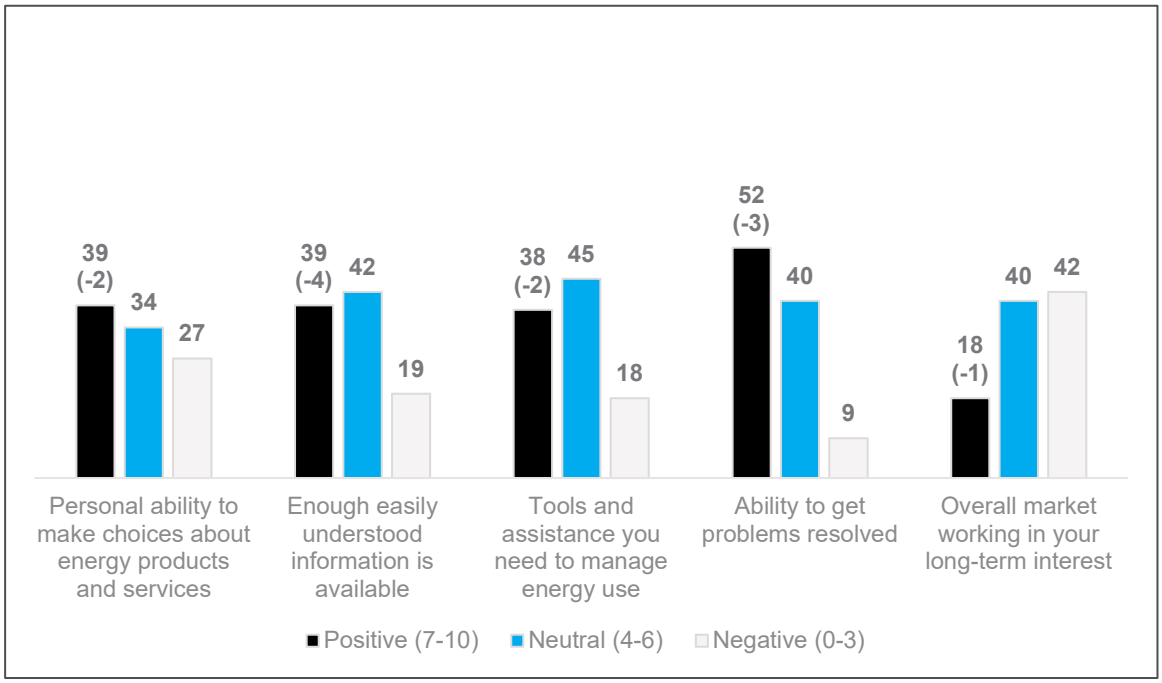
How would you rate the overall value for money of the products and services provided by your service provider in the following areas, in the past 6 months?



Confidence in information, tools and working market

Confidence that the market is working in the consumers' interest has dropped slightly further to 18%.

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



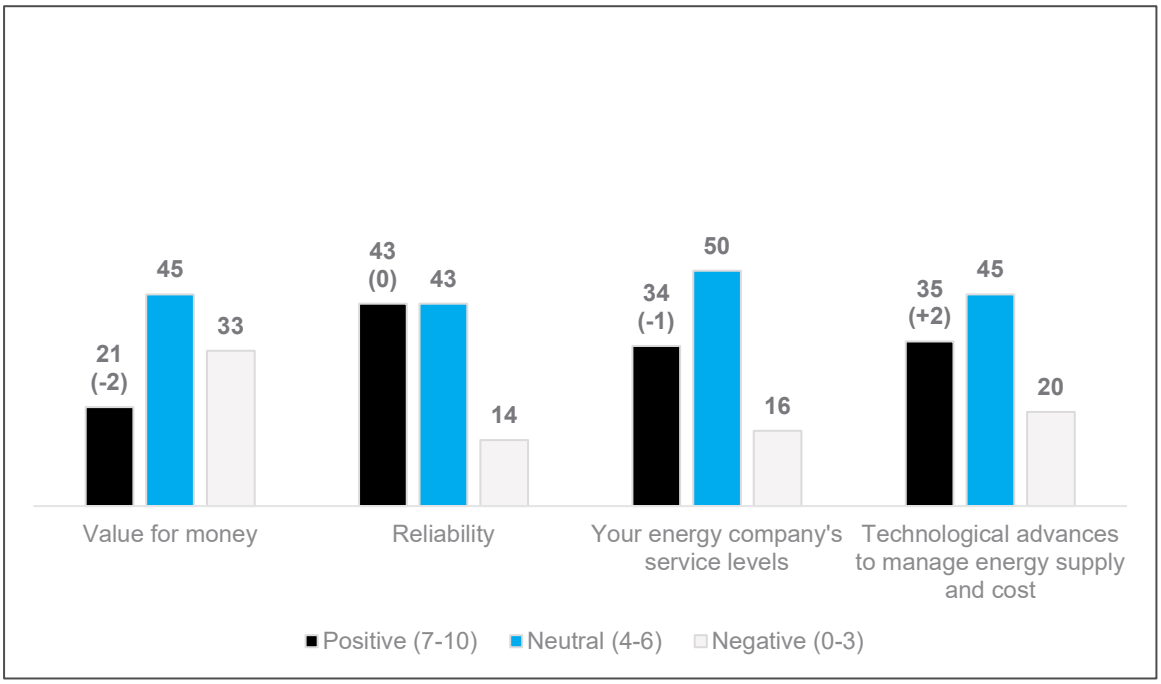
Confidence in long term outcomes

There has been little change in terms of confidence in long term outcomes for Tasmanian consumers.

- 21% of consumers said they had confidence that value for money outcomes from the energy market would improve in the future (down 2%).

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'

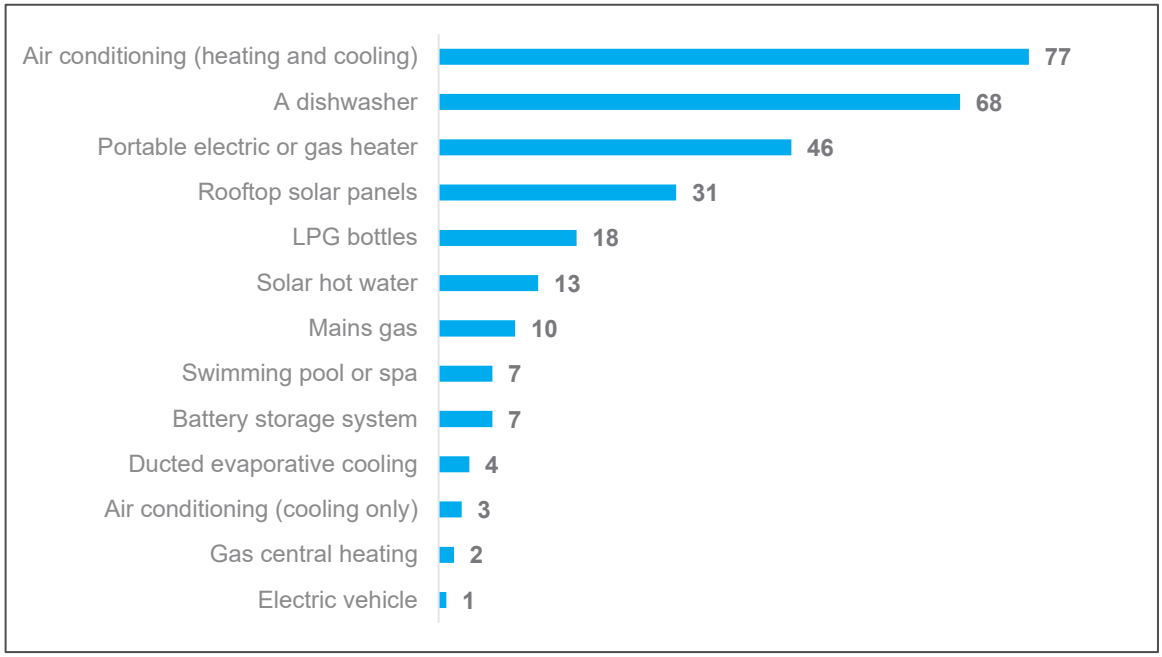


Use of technologies

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

- 77% say that they have an air conditioner for both heating and cooling, and 46% say they have a portable heater.
- Only 2% say they have gas central heating, 3% have air conditioning for cooling only, and 4% have ducted evaporative cooling.
- 19% say they have a smart/digital meter and 8% say they use it to control 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?

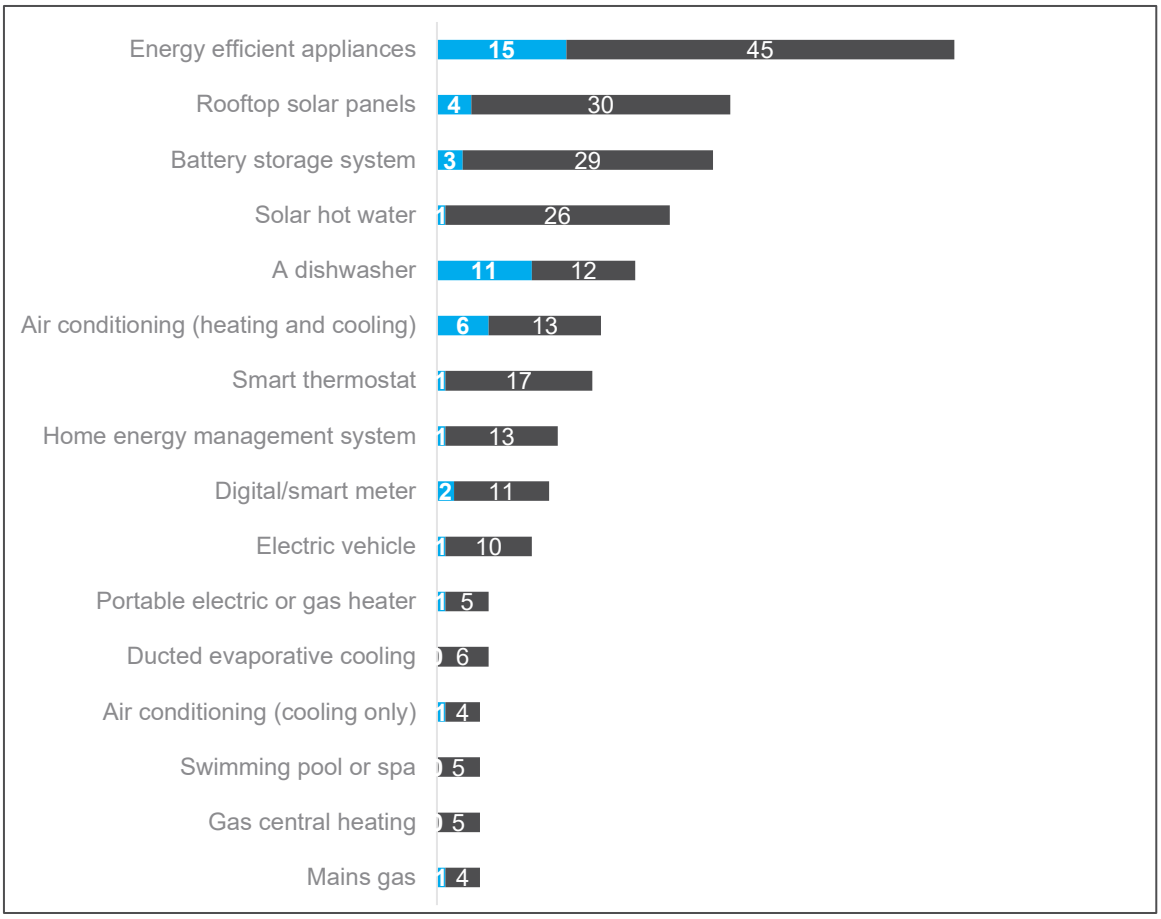
Activity

Uptake of technologies

Renewable energy technologies are something that Tasmanians are considering.

- 34% of consumers who do not have solar panels say that they are considering purchasing rooftop solar panels, and 4% plan to purchase them in the next 12 months.
- 32% of consumers who do not have battery storage systems say they are considering installing a system, and 3% plan to do so in the next 12 months.

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



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

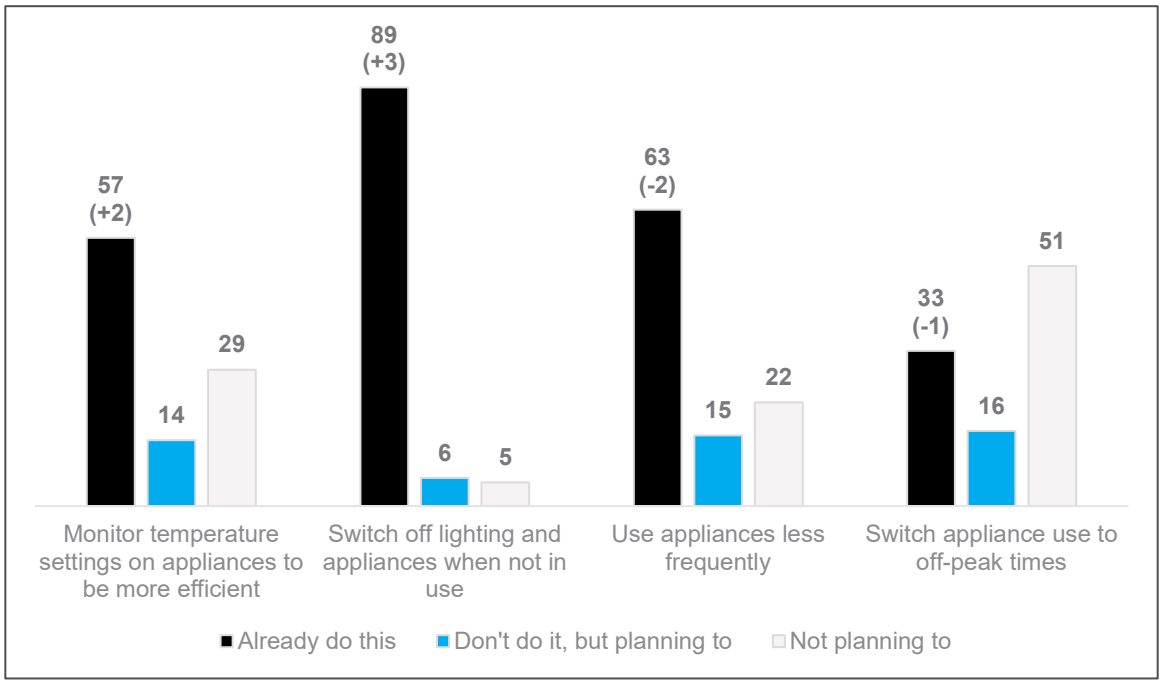
Activity

Energy saving practices

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

- 33% say they switch their use of appliances to off-peak times.
- 89% say they switch off lighting and appliances when not in use.

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



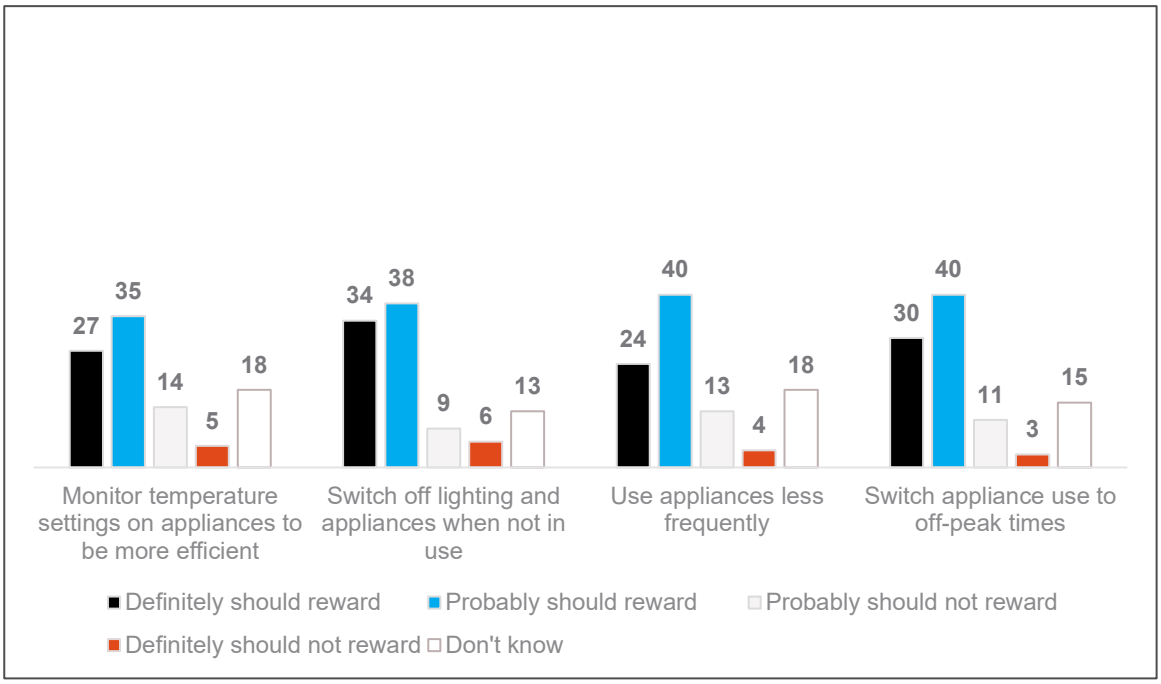
Activity

Reward for reducing energy use

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

- 72% think customers should be rewarded for switching off lighting and appliances when not in use.
- 70% think customers should be rewarded for switching appliance use to off-peak times.
- 64% think customers should be rewarded for using appliances less frequently.
- 62% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.

Should electricity companies do more to financially reward customers who do the following:



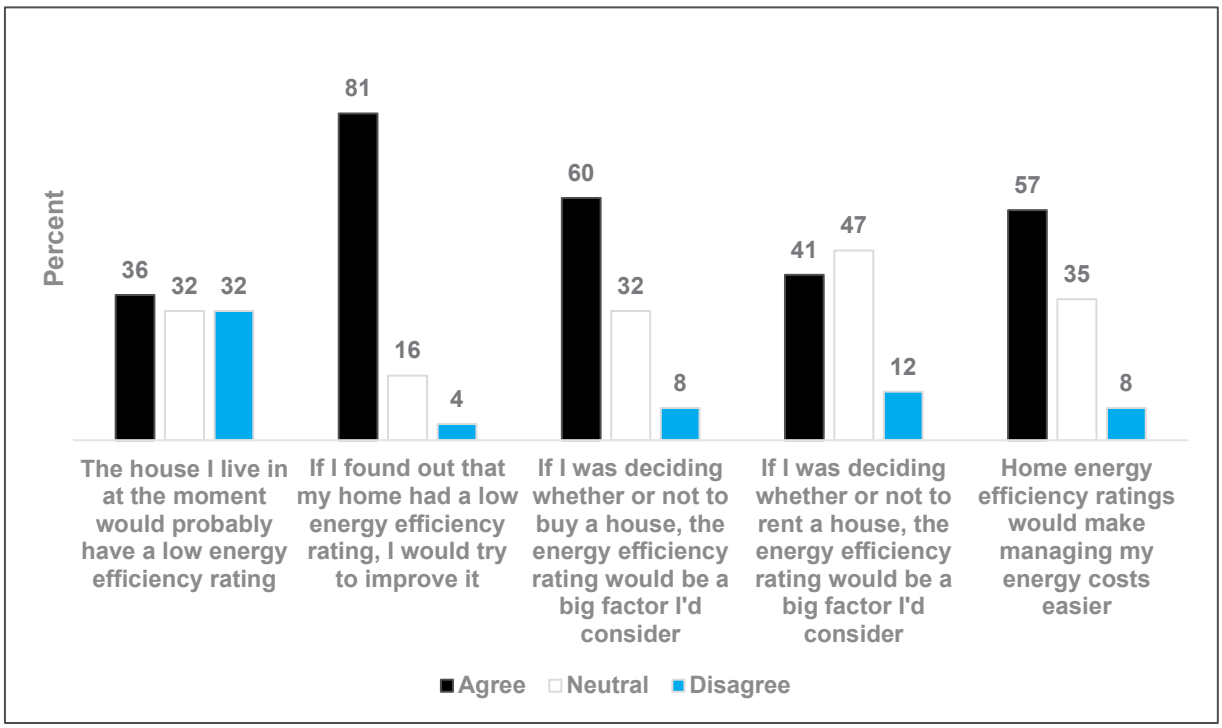
Activity

Housing energy efficiency

The vast majority of Tasmanian consumers would want to improve their house's energy efficiency if they believed it to be low.

- 81% said they would try to improve their home's energy rating if they found out it had a low rating.
- 60% said that an energy rating would be a big factor they would consider when buying a house.
- 41% said that an energy rating would be a big factor they would consider when renting a house.
- 57% said that a home energy efficiency rating would make managing their energy costs easier.
- South Australians are divided between those who think their home would be of low energy efficiency (36%) and those who do not (32%) while 32% could not say.

Do you agree or disagree with the following?

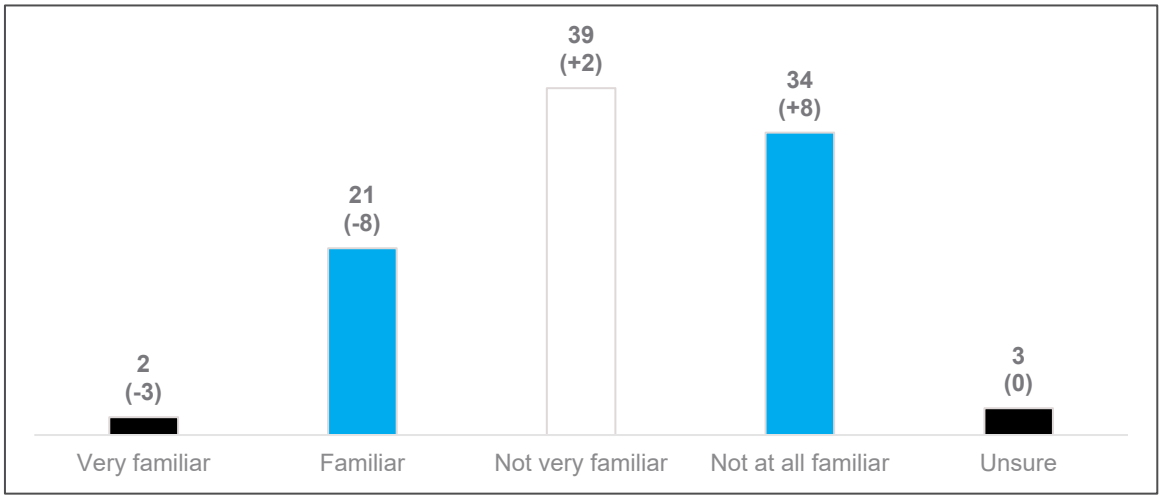


Other

Awareness of the Energy Ombudsman

23% 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

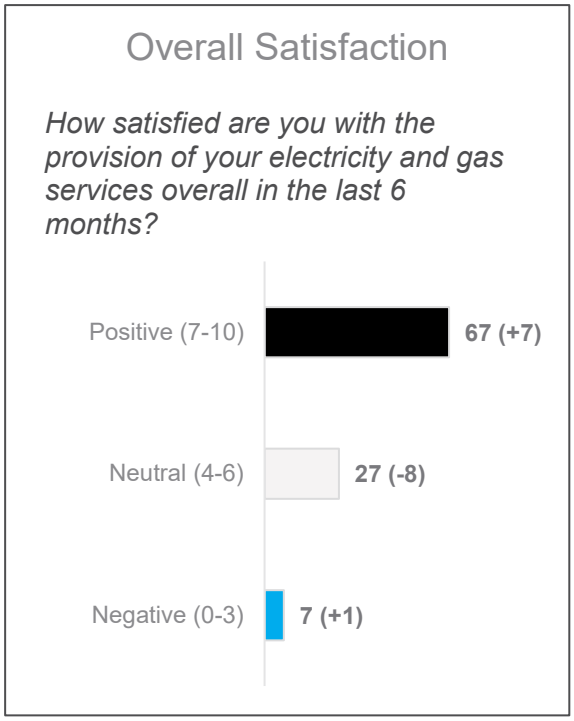
Overall satisfaction

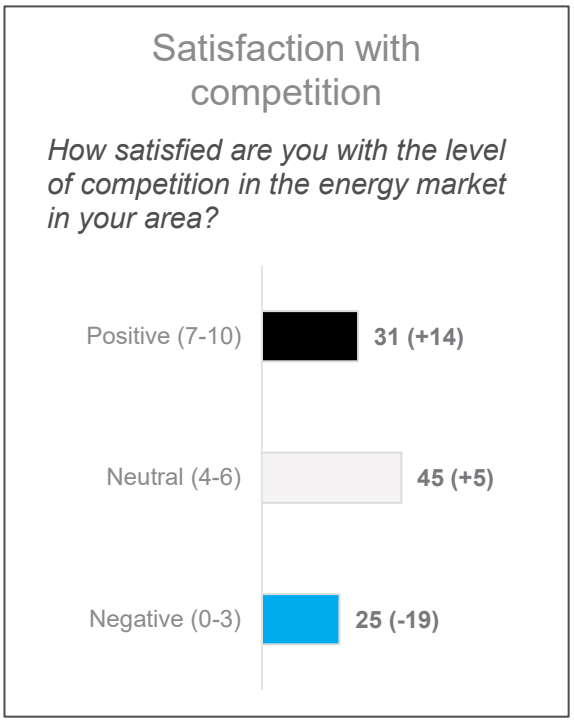
Satisfaction with electricity and gas services amongst household consumers in the ACT has increased.

- 67% say they are satisfied, up 7% from December 2017.

Satisfaction with the levels of competition has increased more sharply.

- 31% of ACT household consumers now say they are satisfied, up 14% since December 2017.



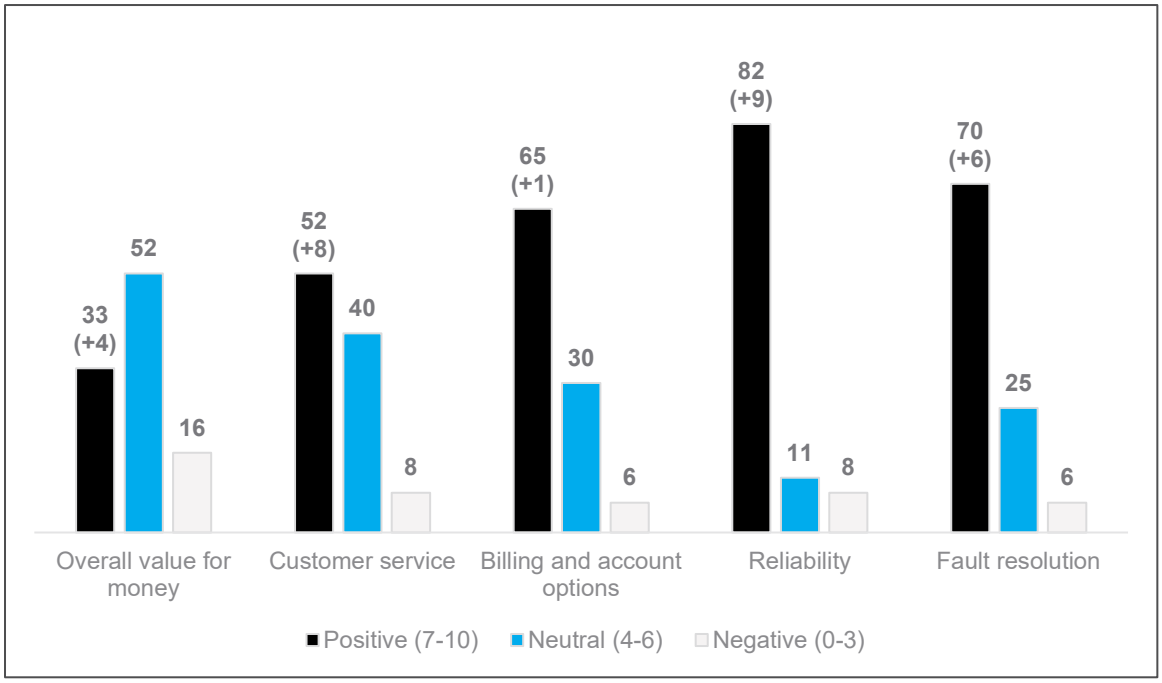


Satisfaction with electricity

Satisfaction has increased for all measures relating to electricity.

- The largest increases were for reliability (up 9% to 82%), customer service (up 8% to 52%) and fault resolution (up 6% to 70%).
- Overall satisfaction with value for money outcomes is up 4% off a low base to 33%.

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

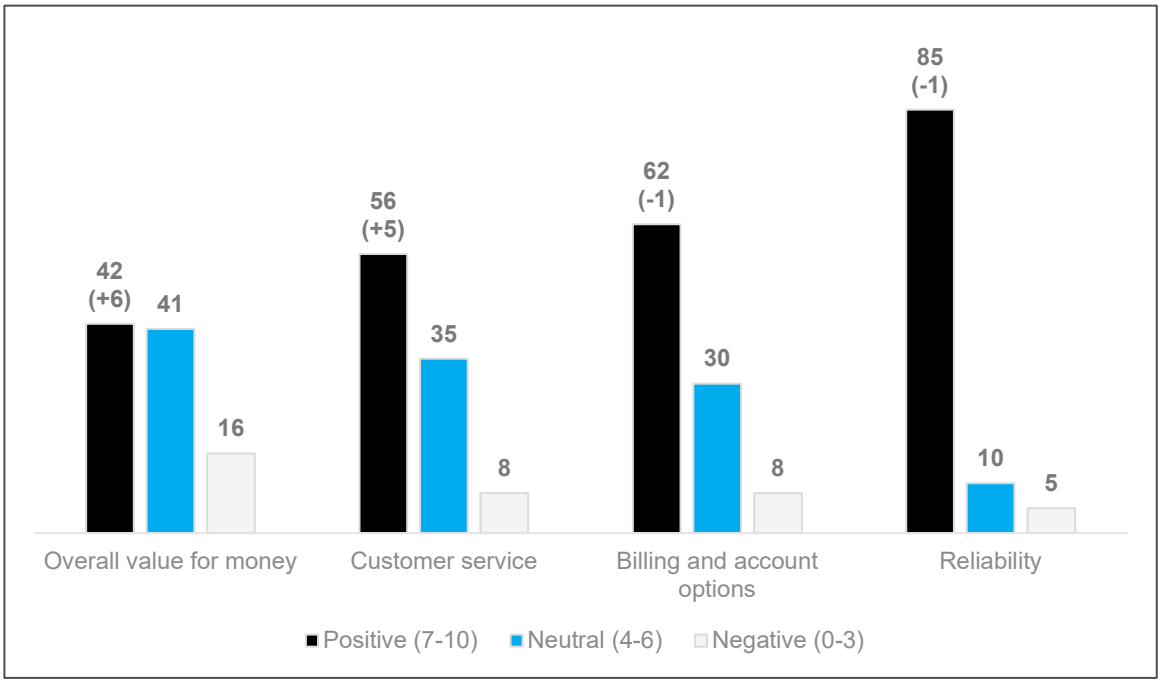


Satisfaction with gas

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

- Satisfaction with overall value for money increased 6% to 42%.
- Satisfaction with customer service increased 5% to 56%.

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



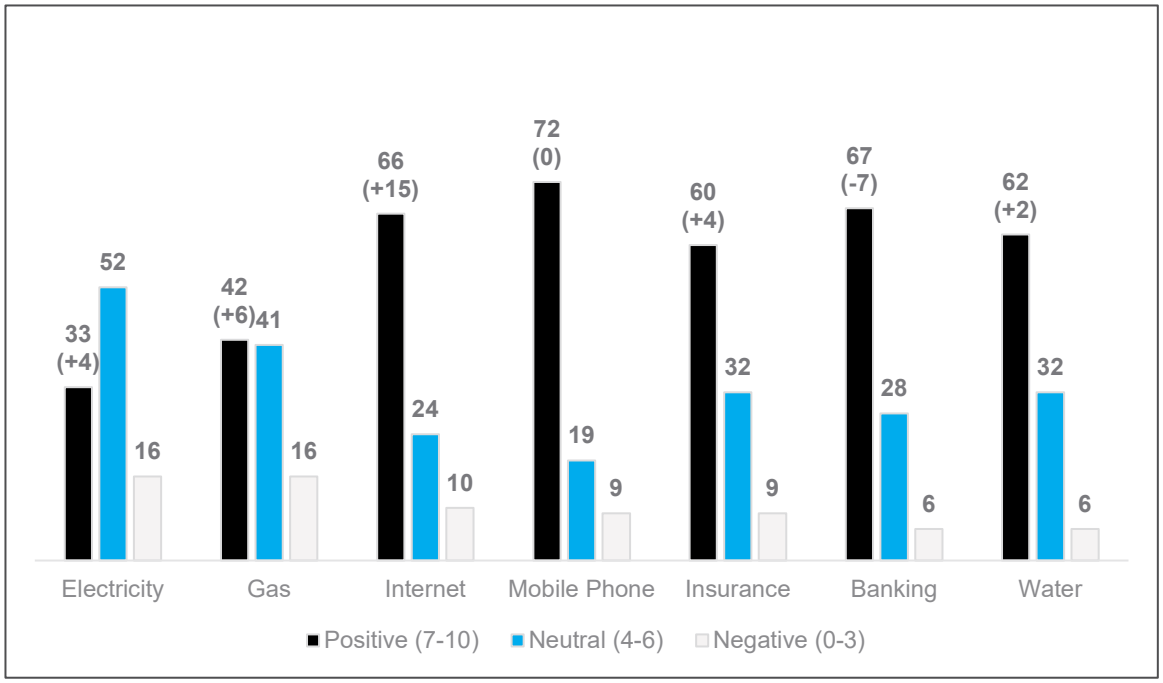
Base: ACT consumers with gas (n=147)

Satisfaction with utilities and services

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

- Electricity (33% 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?

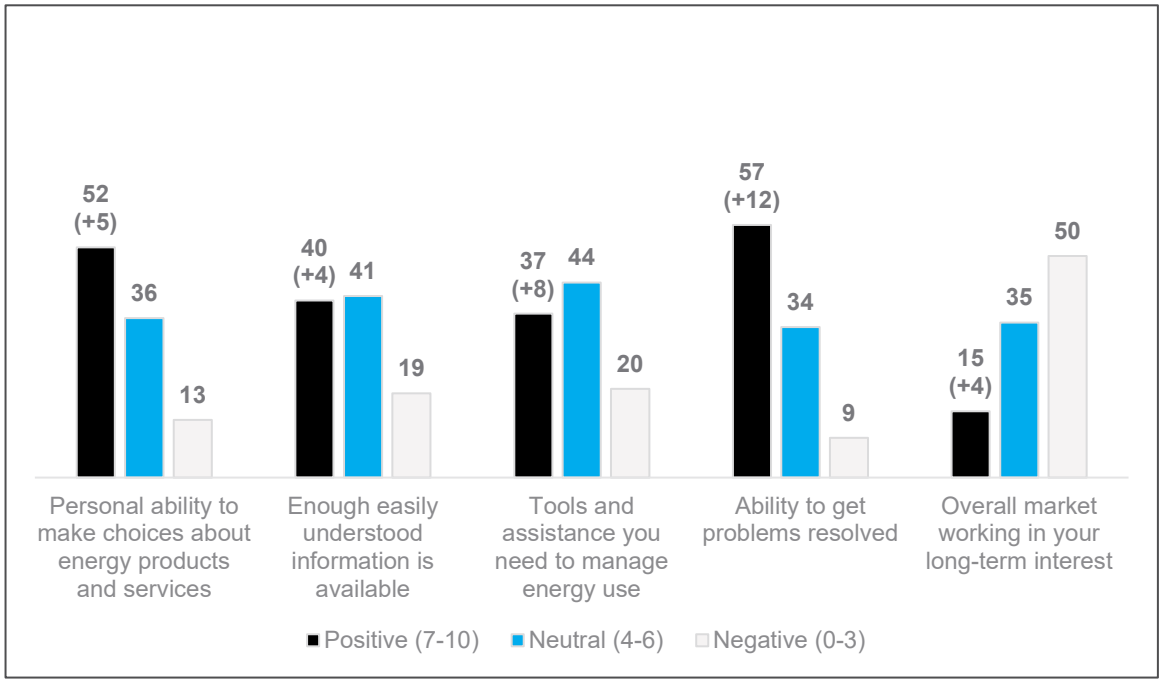


Confidence in information, tools and a working market

Confidence in the energy market has increased off a low base among ACT consumers.

- 15% say they are confident in the overall market working in their long-term interests (up 4%).
- 57% say they are confident in their ability to get problems resolved (up 12%) and 37% are confident in the tools and assistance they need to manage energy use (up 8%).

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



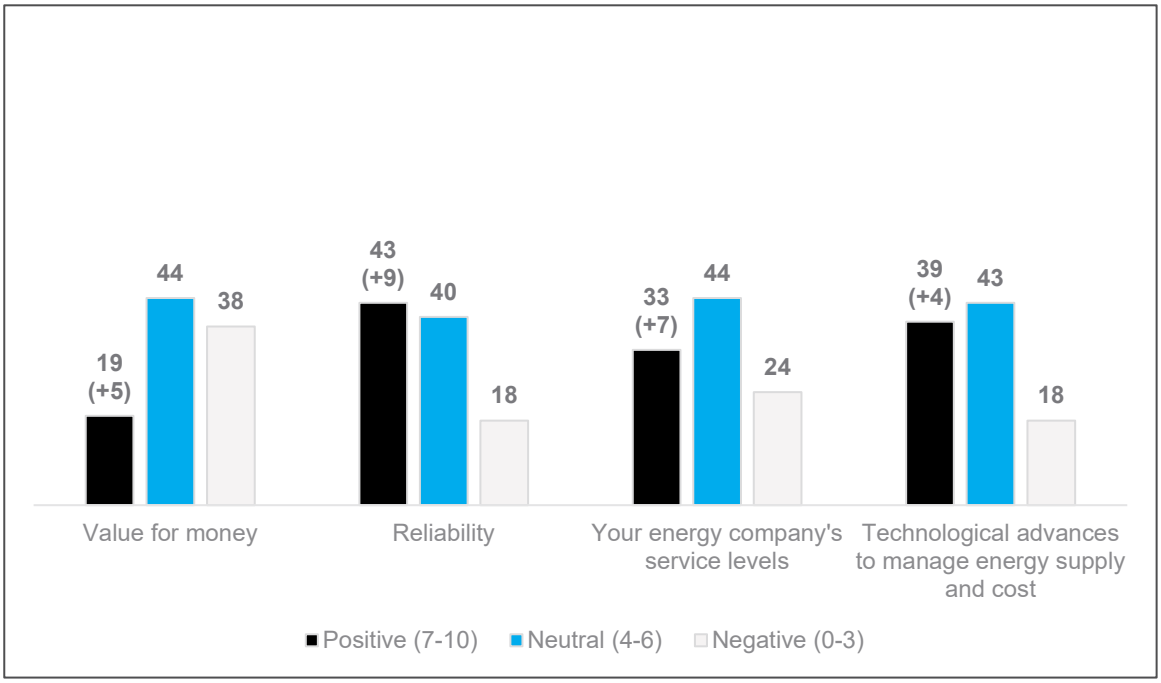
Confidence in long term outcomes

Confidence in long term outcomes has improved among ACT consumers since December 2017, though confidence that value for money outcomes will improve in the future remains low.

- 43% say they are confident that reliability will improve in the future (up 9%).
- 33% say they are expecting energy service levels to improve (up 7%).
- Just 19% say they are confident the market will provide better value for money in the future (up 5%).

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

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

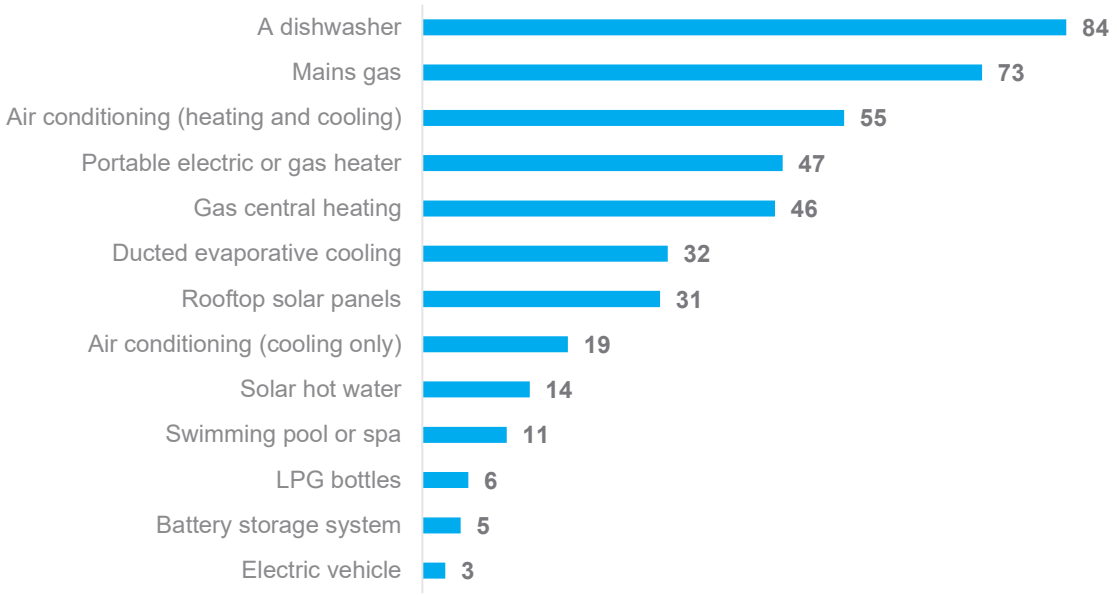


Use of technologies

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

- 73% say they have mains gas, and 46% have gas central heating.
- 55% say they have air conditioning for both heating and cooling.
- 47% say they have a portable electric or gas heater.
- 32% say they have ducted evaporative cooling.

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?

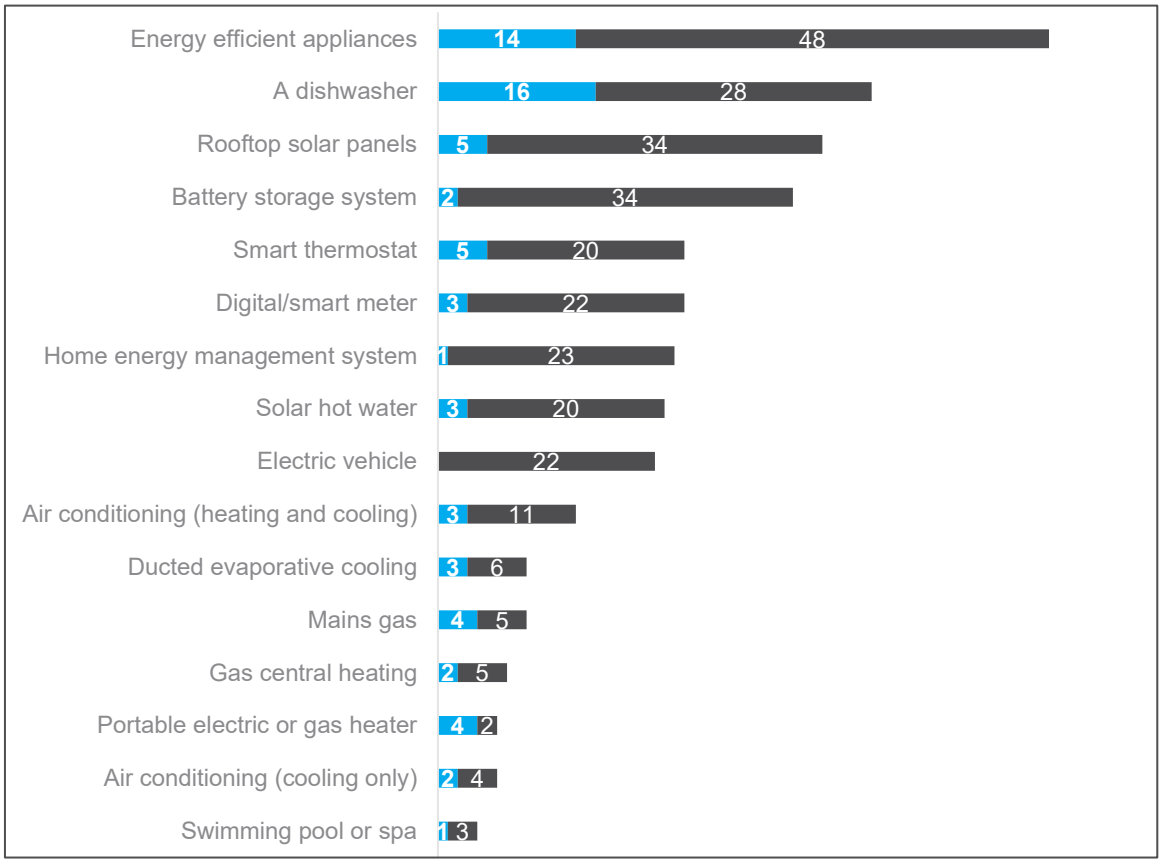
Activity

Uptake of technologies

Most interest in new technologies among ACT household consumers is in the long-term, rather than the short-term.

- 39% say they are considering rooftop solar panels and 5% plan to purchase them in the next 12 months.
- 36% say they are considering a battery storage system and 2% plan to purchase one in the next 12 months.
- 22% say that they are considering purchasing an electric vehicle, though nobody plans to purchase one in the next 12 months.

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



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

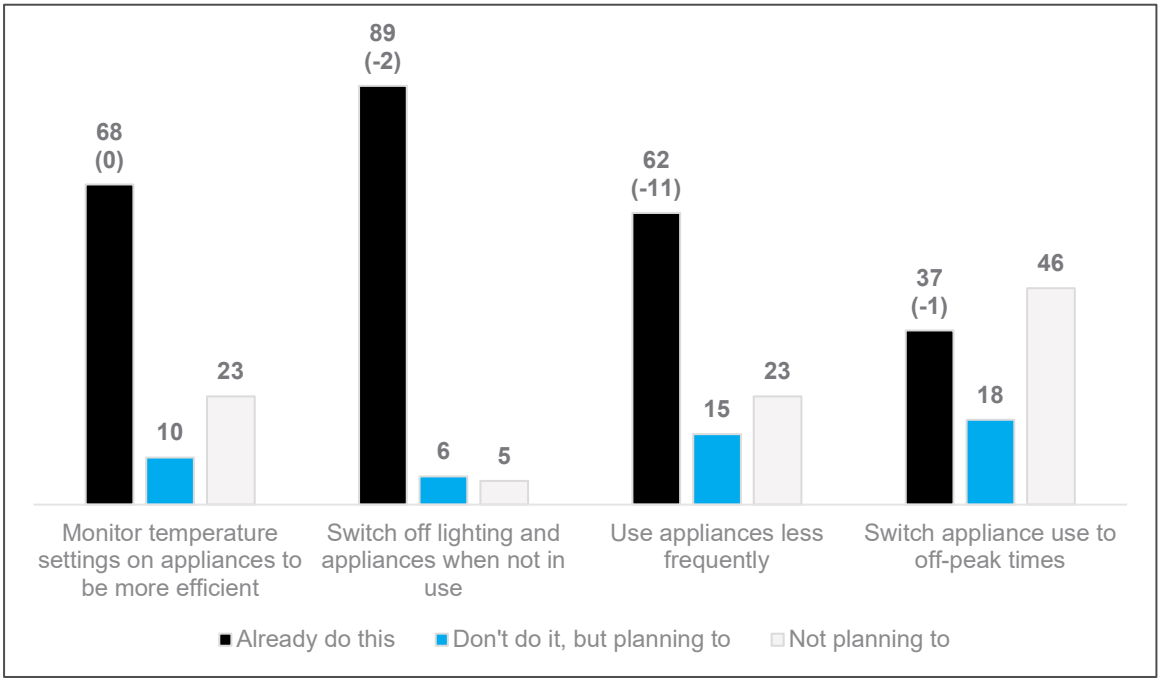
Activity

Energy saving practices

ACT household consumers are actively trying to manage their energy use.

- 89% say they switch off lighting and appliances when not in use, and 68% say they monitor temperature settings on appliances to be more efficient.
- 37% say they already have switch appliance use to off-peak times.

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



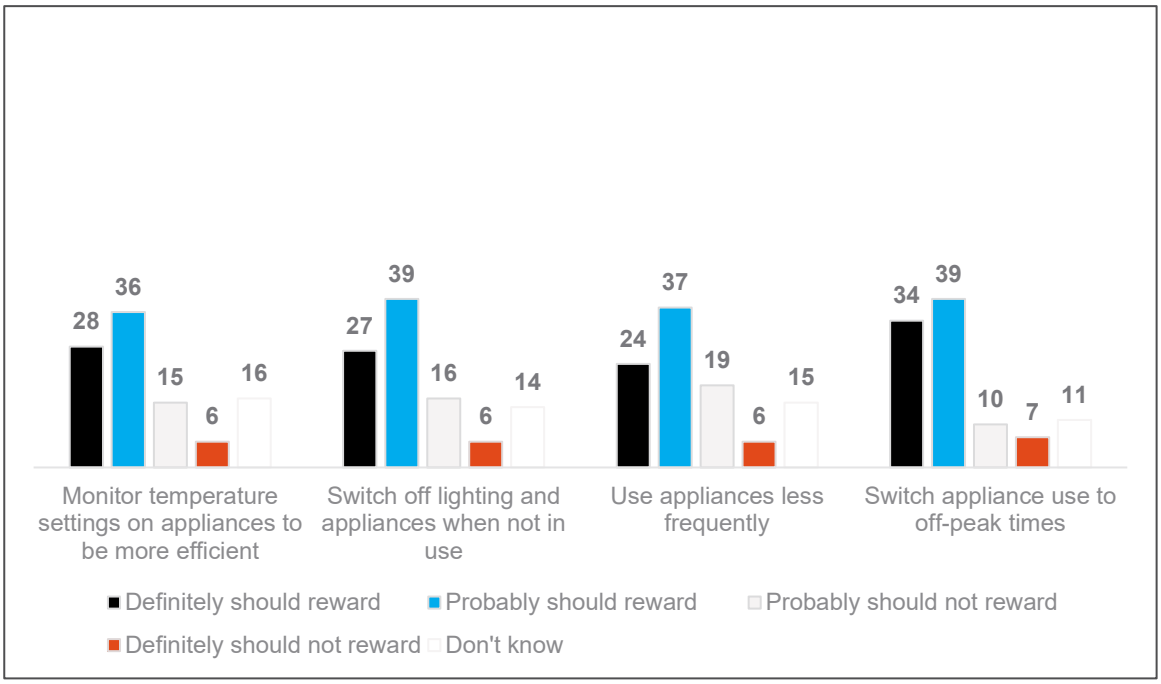
Activity

Reward for reducing energy use

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

- 73% think customers should be rewarded for switching appliance use to off-peak times.
- 66% think customers should be rewarded for switching off lighting and appliances when not in use.
- 64% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.
- 61% think customers should be rewarded for using appliances less frequently.

Should electricity companies do more to financially reward customers who do the following:



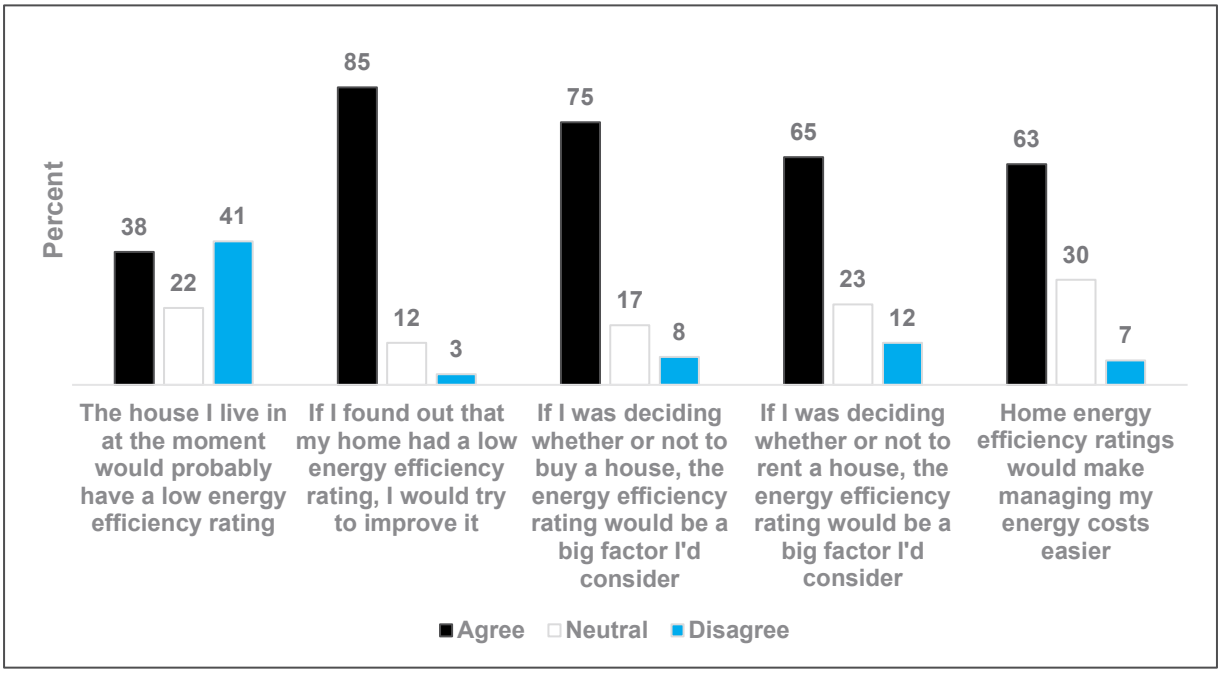
Activity

Housing energy efficiency

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

- 85% said they would try to improve their home's energy rating if they found out it had a low rating.
- 75% said an energy rating would be a big factor they would consider when buying a house.
- 65% said an energy rating would be a big factor they would consider when renting a house.
- 63% said a home energy efficiency rating would make managing their energy costs easier.
- The largest proportion (41%) do not think their current home would have a low energy efficiency rating and 22% could not say what their home's rating would be.

Do you agree or disagree with the following?

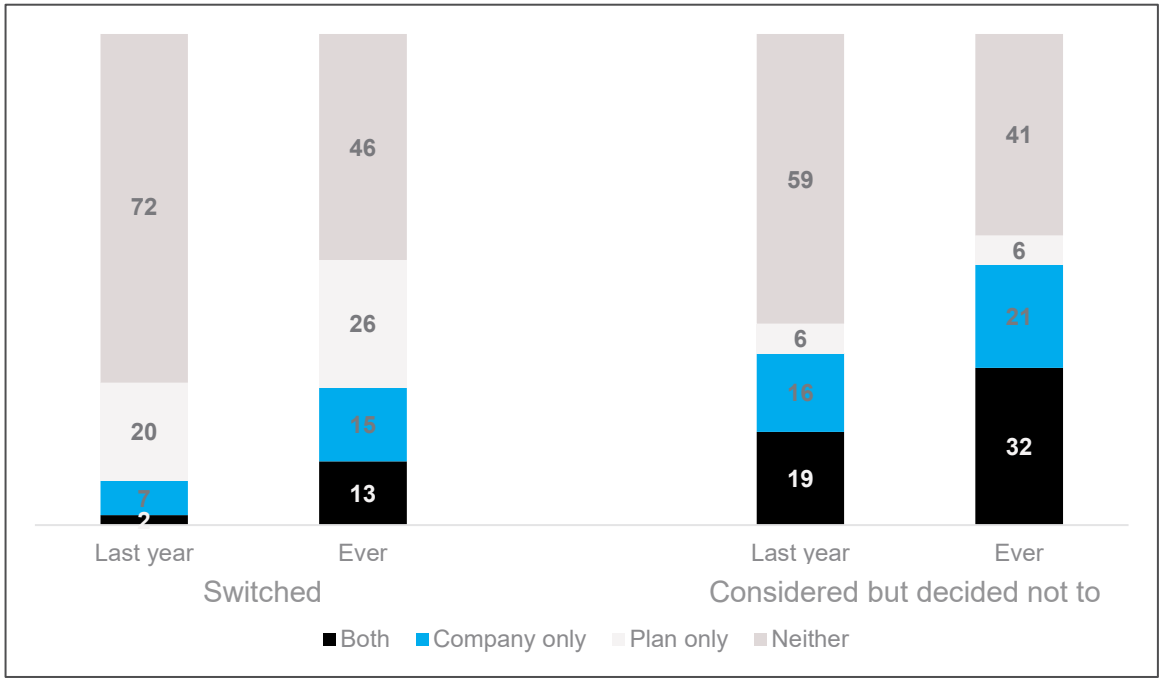


Switching behaviour

Many ACT consumers are considering switching and choosing not to do so

- 54% say they have switched energy companies or plans in the past. 46% say they have not switched.
- 41% say they considered switching energy companies or plans in the last year but decided not to, compared to 29% who actually switched in that period.

Which of the following have you done?



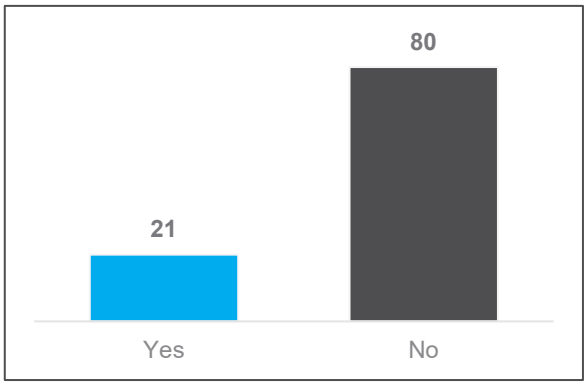
Activity

Reasons for considering switching

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

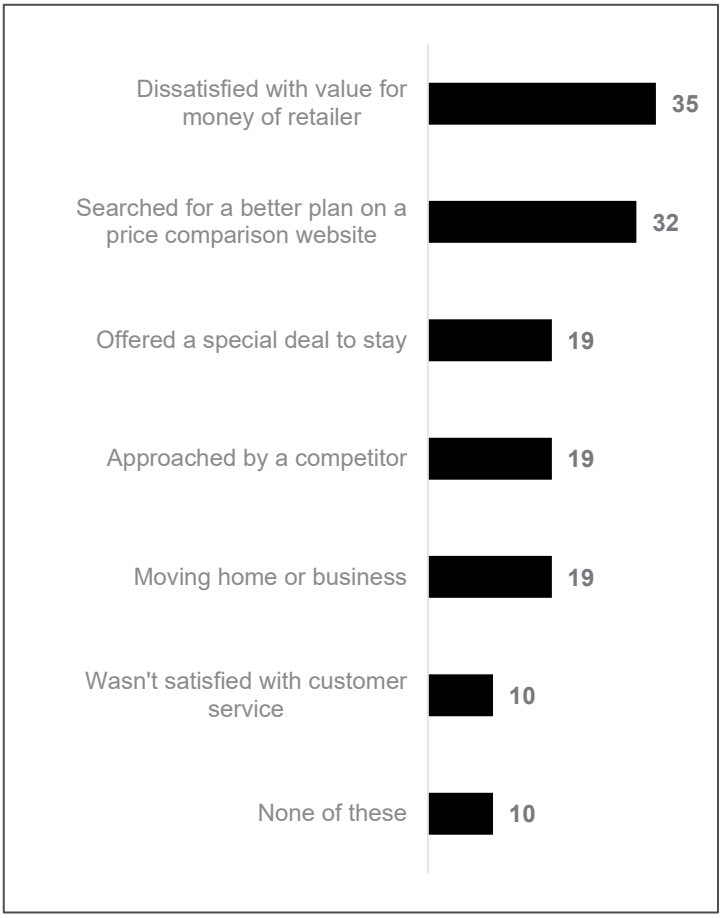
- 35% said they were dissatisfied with the value for money they were getting from their retailer the last time they considered switching.
- 32% searched for a better plan on a price comparison website.
- 21% intend to switch companies or plans in the next year.

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



Base: All consumers (n=200)

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



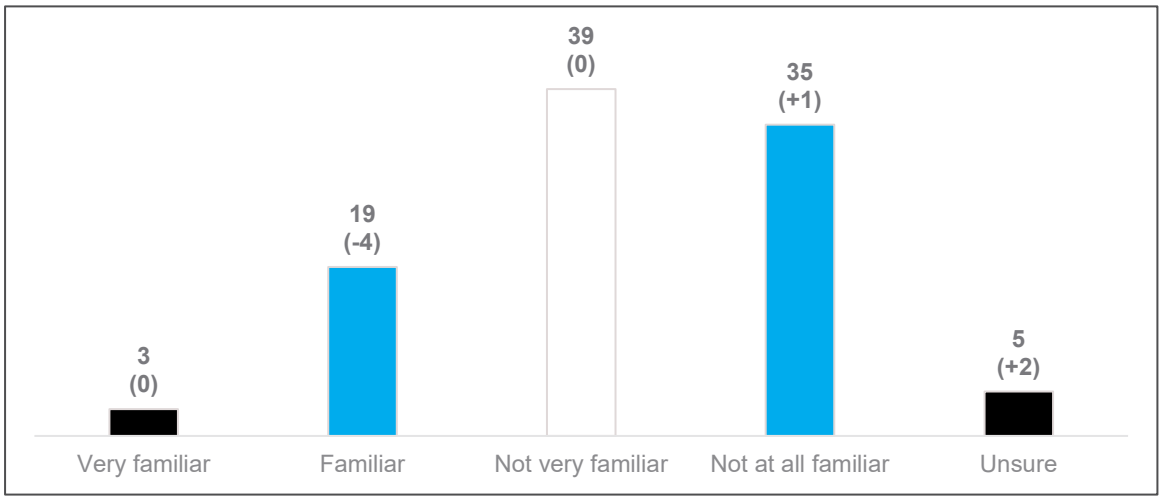
Base: Consumers who have switched or looked at switching in the past (n=124)

Other

Awareness of the Energy Ombudsman

22% 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 has increased slightly.

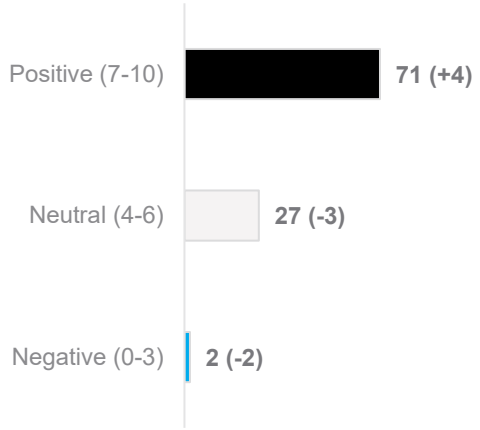
- 71% are satisfied overall, up 4% from December 2017.

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

- 47% now say they are satisfied, up 14% from December 2017.

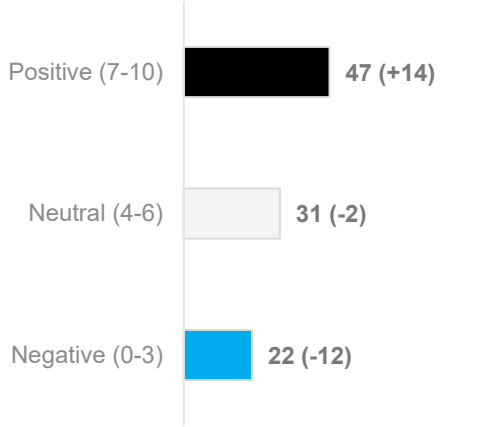
Overall Satisfaction

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?

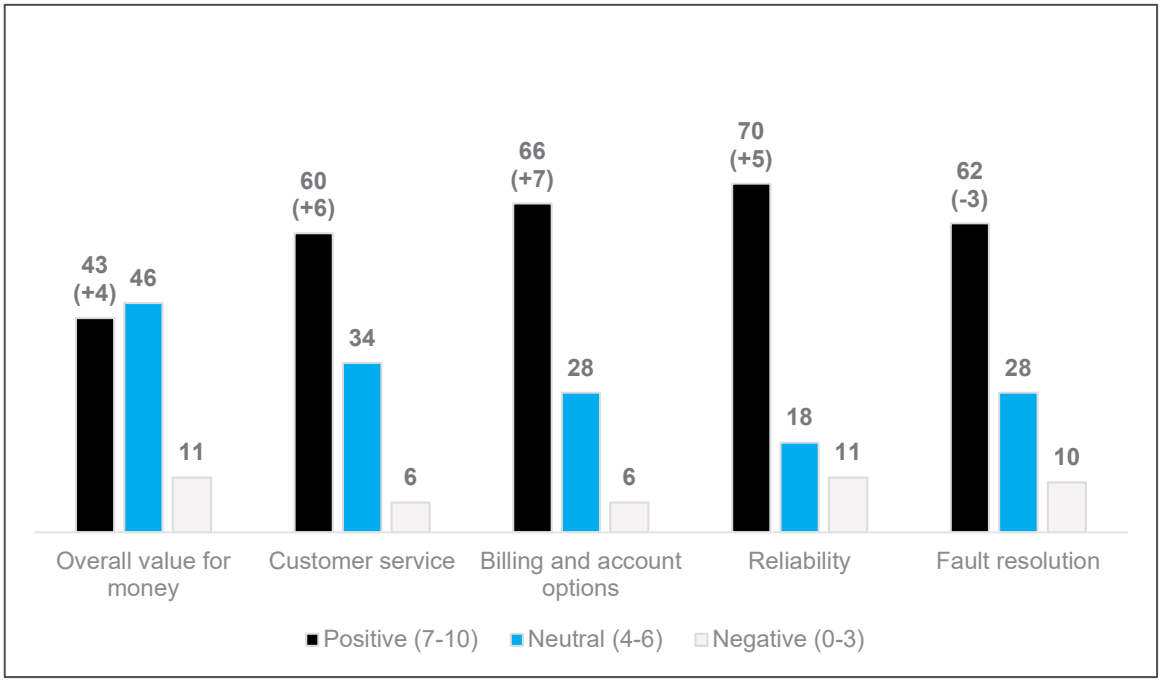


Satisfaction with electricity

Satisfaction with most electricity-related measures has increased.

- 43% say they are satisfied with value for money outcomes (up 4%)
- 66% say they are satisfied with their billing and account options, up 7% from December 2017.
- 60% say they are satisfied with their customer service, up 6% from December 2017.
- 70% say they are satisfied with reliability, up 5%.

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

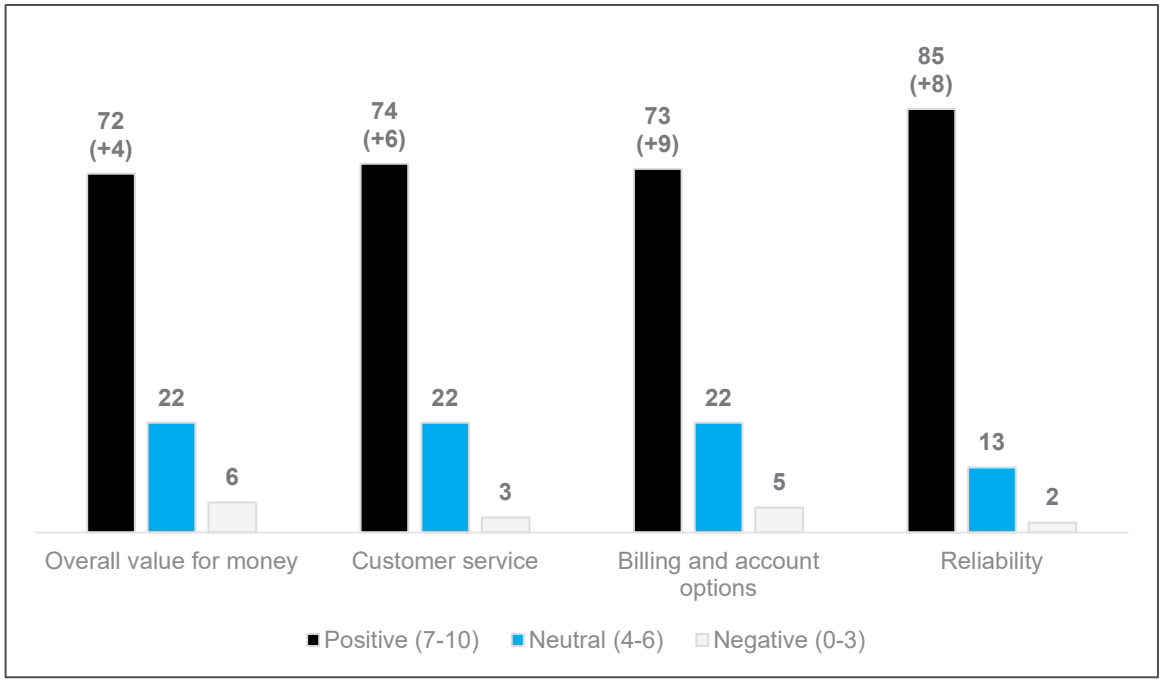


Satisfaction with gas

Satisfaction with gas services has increased for Western Australian household consumers across each measure.

- Satisfaction with billing and account options has increased 9% to 73% since December 2017.
- Satisfaction with reliability has increased by 8% to 85%.
- Satisfaction with customer service has increased by 6% to 74%.
- Satisfaction with overall value for money has increased by 4% to 72%.

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



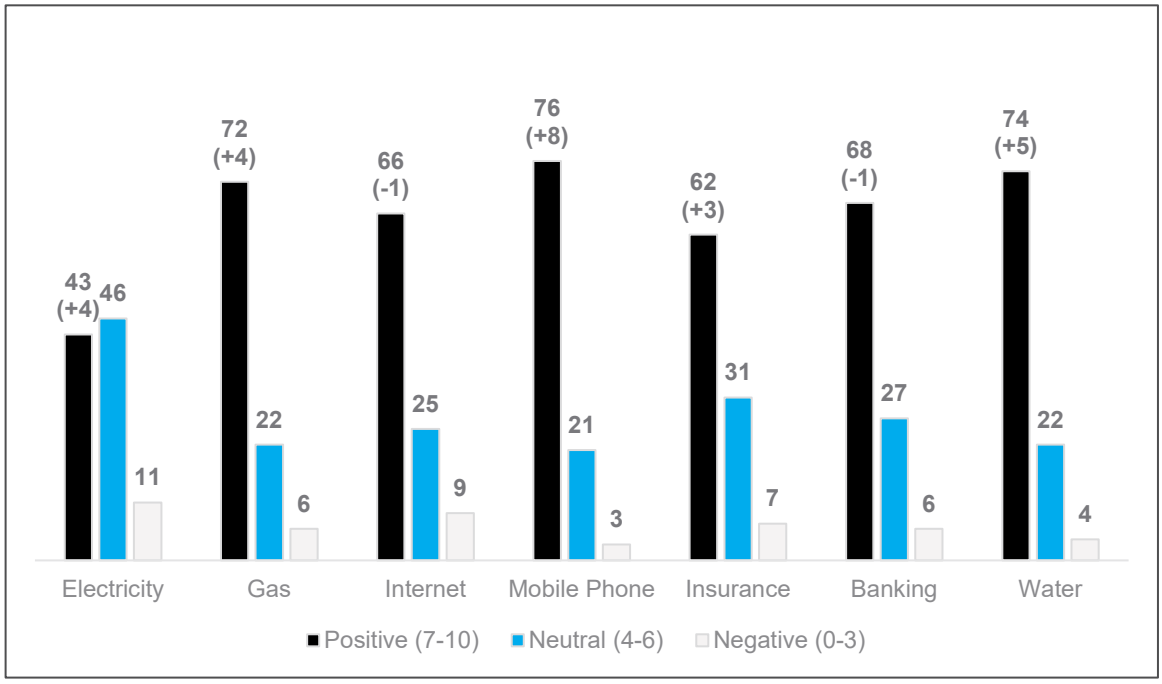
Base: WA consumers with gas (n=179)

Satisfaction with utilities and services

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

- Satisfaction with electricity (43%) continues to trail other utilities and services in the survey in terms of value for money. The next lowest satisfaction rating is 62%, for insurance.
- At 72%,% satisfaction with gas is bettered only by water and mobile phone 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?

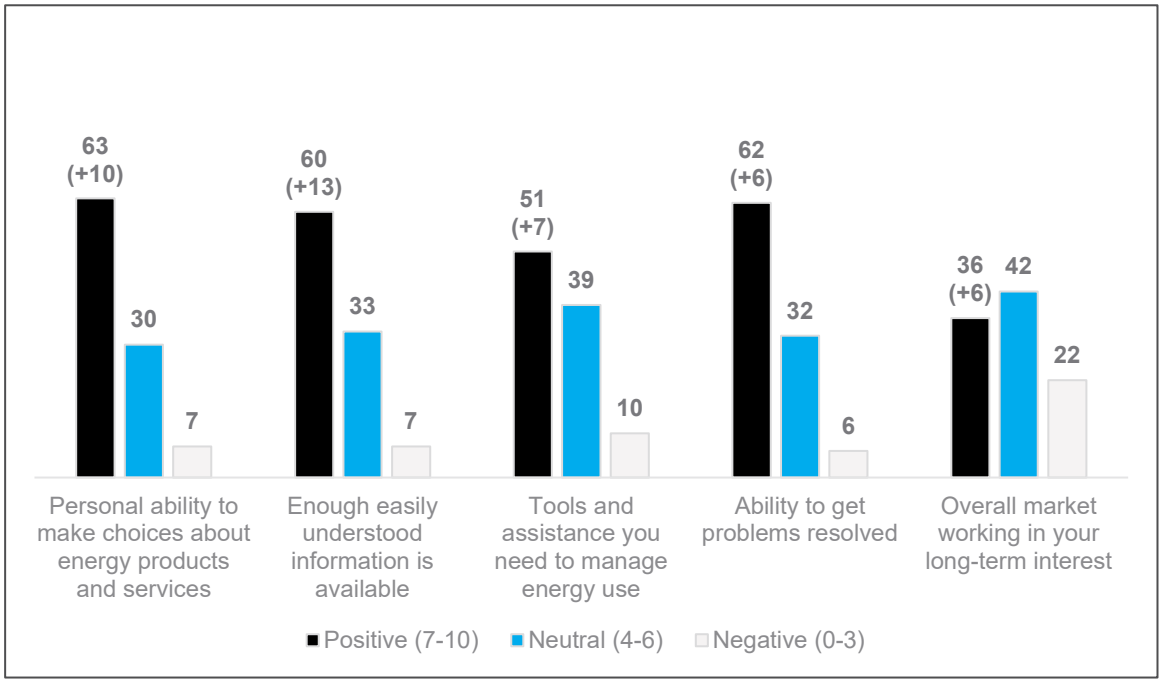


Confidence in information, tools and a working market

Confidence in information and tools increased across all measures for Western Australian consumers.

- 60% say they is enough easily understood information available, up 13% from December 2017.
- 63% are confident in their own ability to make choices about energy products, up 10%.
- While the proportion of consumers who believe the market is working in their interests has increased by 6%, it remains low at 36%.

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



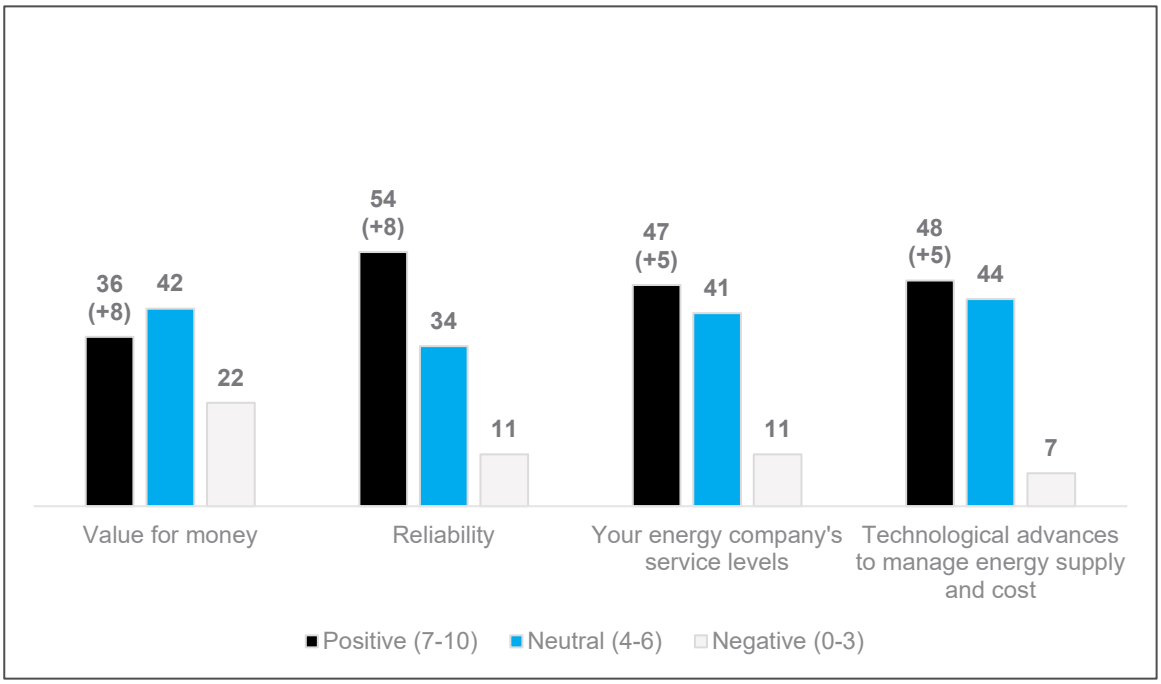
Confidence in long term outcomes

Confidence in the market providing better long-term outcomes has increased for Western Australian consumers.

- 54% said they were confident the market would provide greater reliability (up 8% from December 2017).
- 36% said they are confident that the market will provide better value for money (up 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'

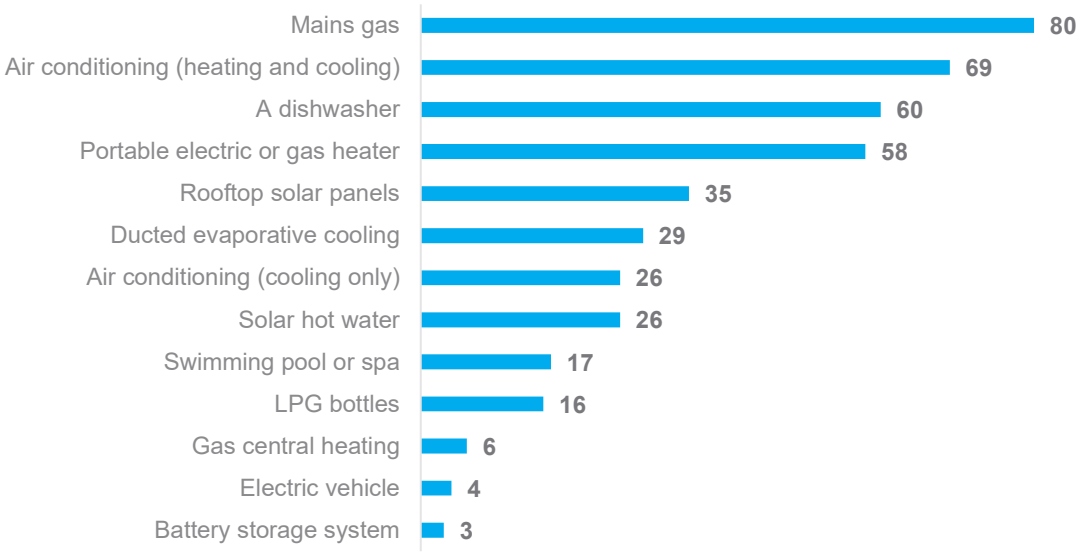


Activity

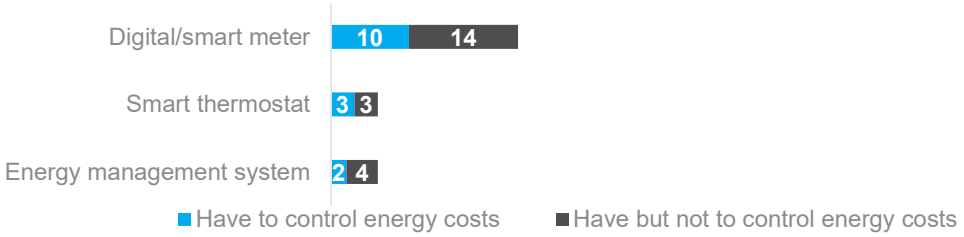
Use of technologies

Western Australian household consumers in this survey are the most likely to have solar hot water and / or portable heaters.

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?



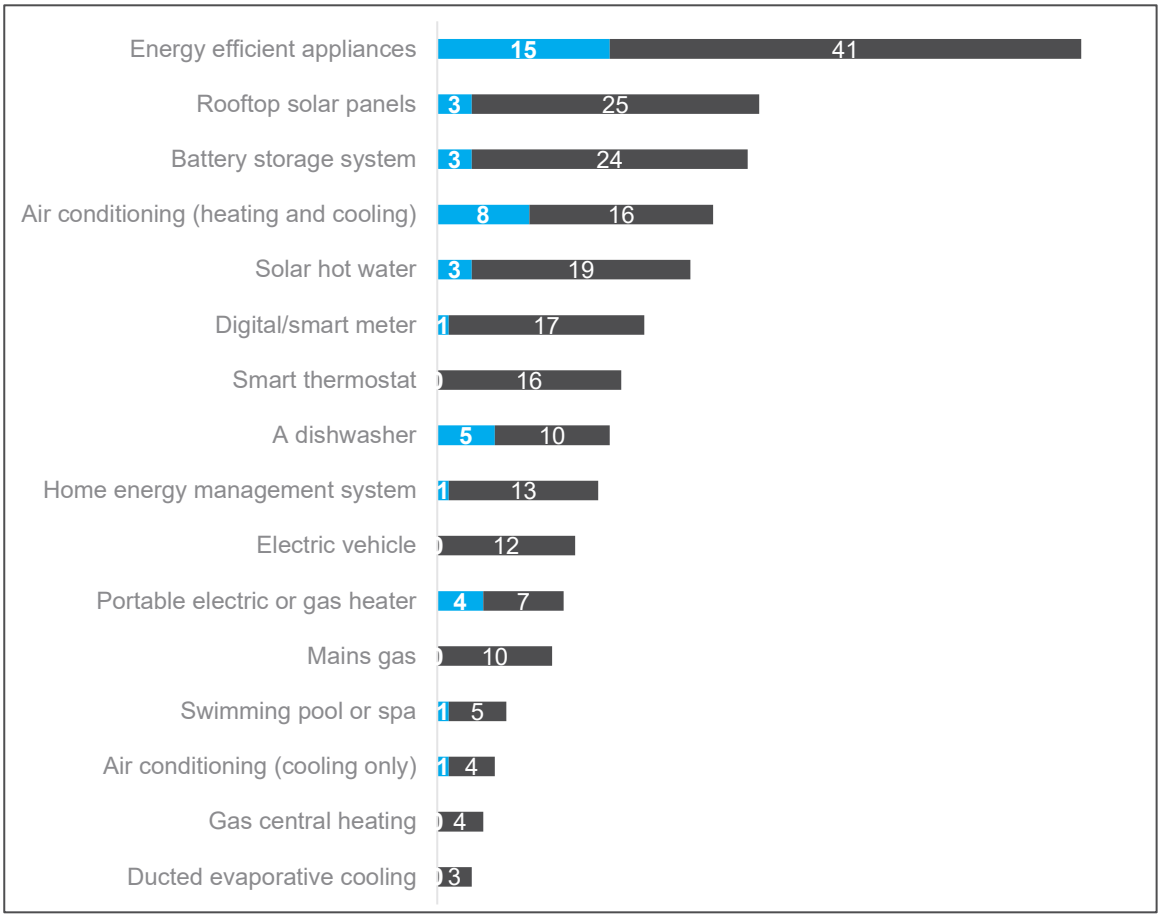
Activity

Uptake of technologies

Western Australian household consumers show interest in purchasing more energy efficient appliances.

- 28% say that they are considering rooftop solar panels, and 3% intend to purchase them in the next 12 months.
- 27% claim to be considering a battery storage system, and 3% intend to purchase one in the next 12 months.

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



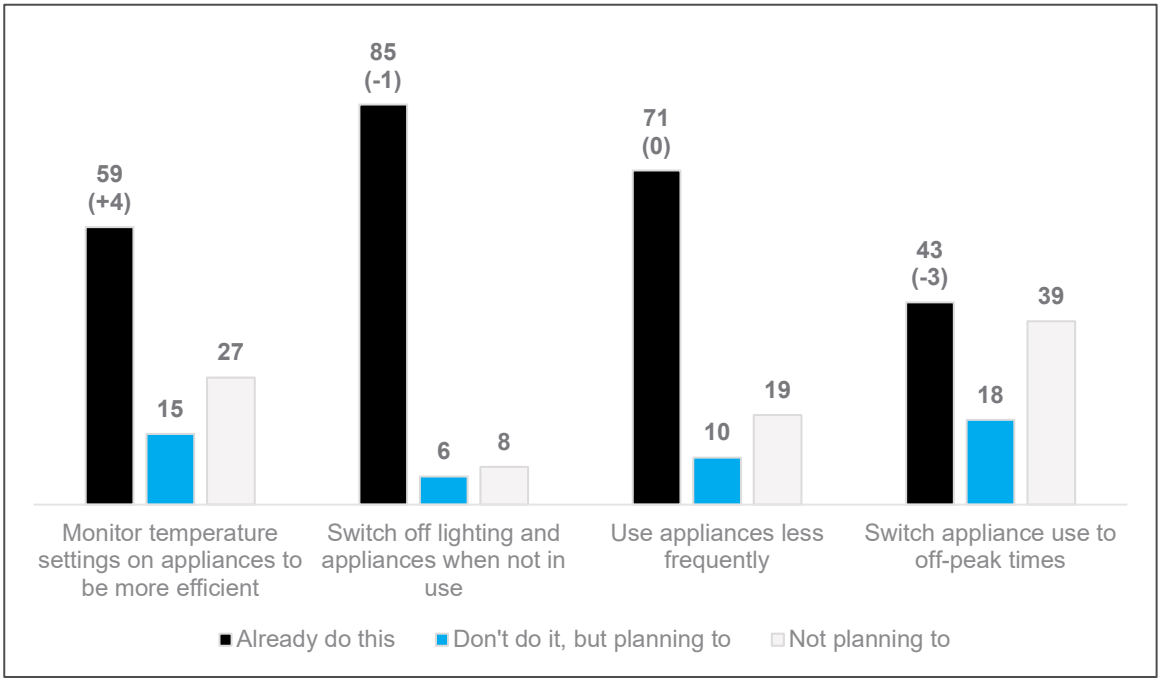
Activity

Energy saving practices

Western Australian consumers are engaging in a variety of energy saving practices.

- 85% say they already switch off lighting and appliances when not in use.
- 59% say they monitor temperature setting on appliances to be more efficient.
- 43% say they have switched appliance use to off-peak times.

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



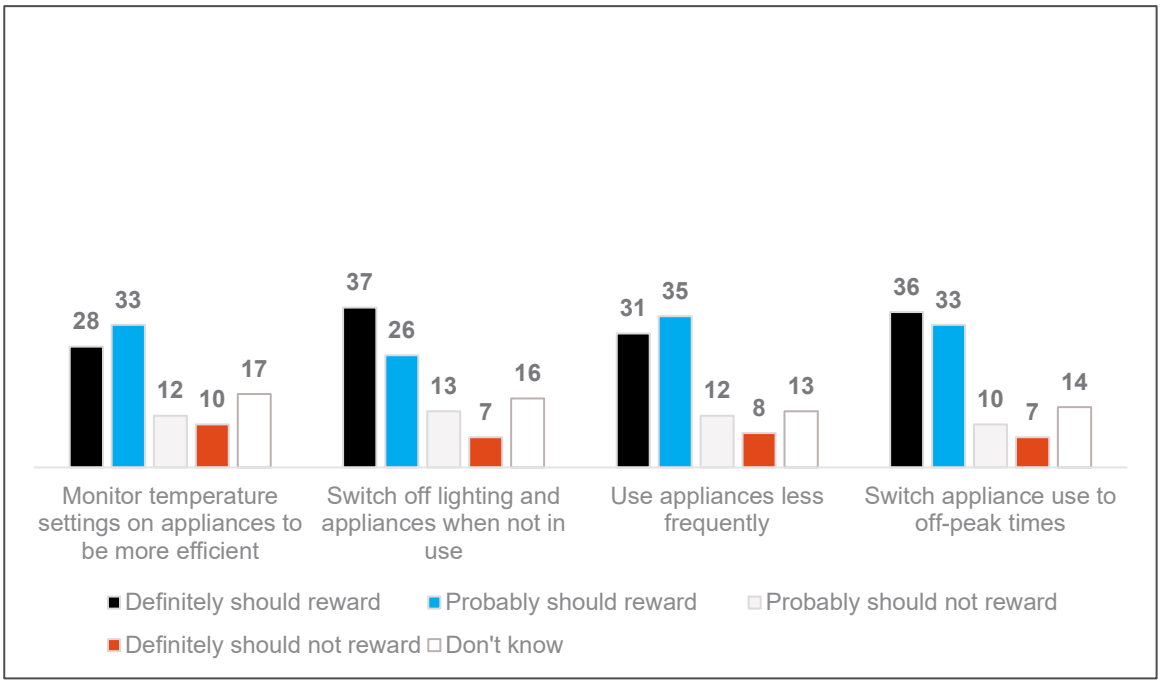
Activity

Reward for reducing energy use

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

- 69% think customers should be rewarded for switching appliance use to off-peak times.
- 66% think customers should be rewarded for using appliances less frequently.
- 63% think customers should be rewarded for switching off lighting and appliances when not in use.
- 61% think customers should be rewarded for monitoring temperature setting on appliances to be more efficient.

Should electricity companies do more to financially reward customers who do the following:



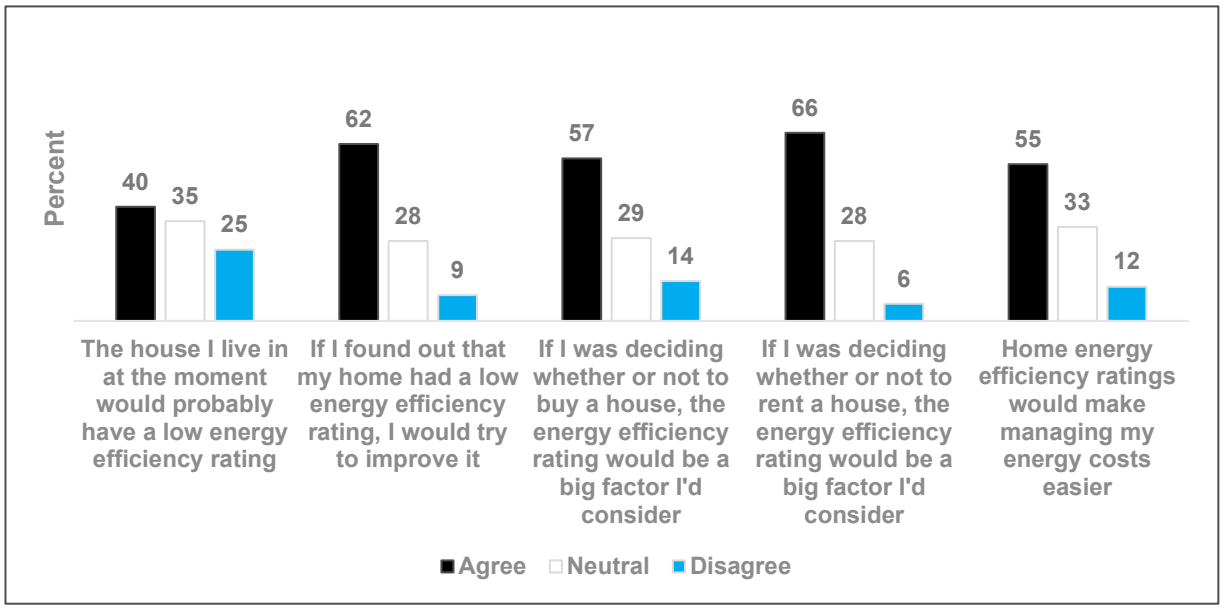
Activity

Housing energy efficiency

Many Western Australian consumers believe their current housing would not be energy efficient.

- 62% said they would try to improve their home's energy rating if they found out it had a low rating.
- 57% said an energy rating would be a big factor they would consider when buying a house.
- 66% said an energy rating would be a big factor they would consider when renting a house.
- 55% said a home energy efficiency rating would make managing their energy costs easier.
- The largest proportion (40%) think that their current home would have a low energy efficiency rating.

Do you agree or disagree with the following?

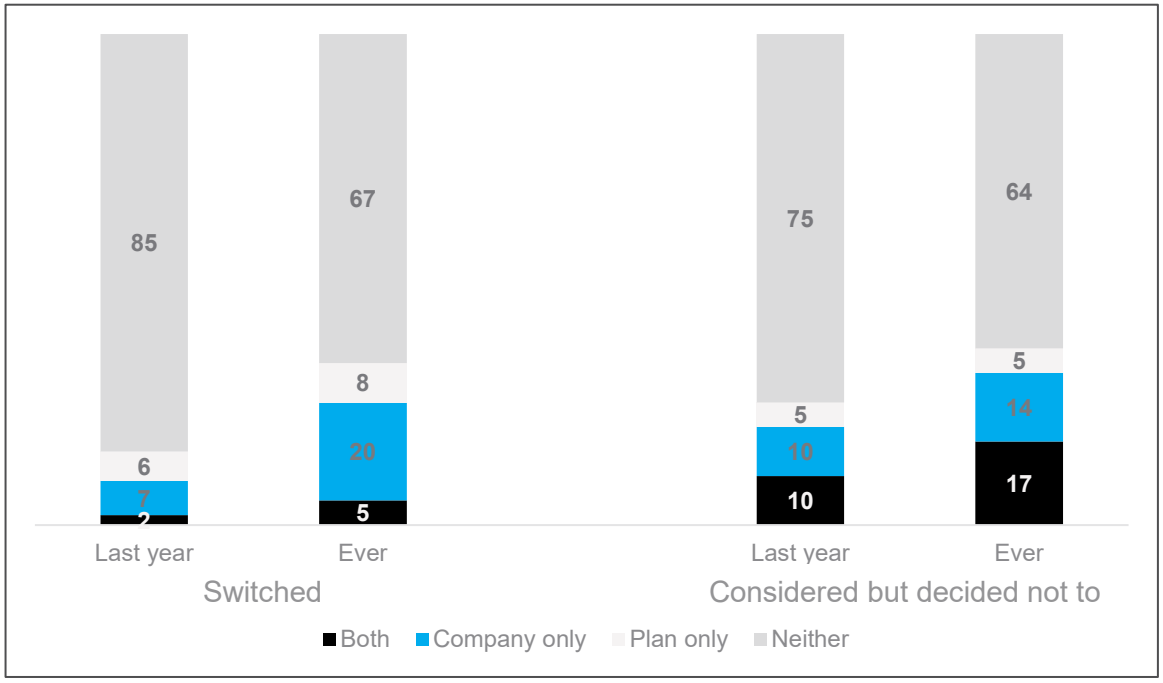


Switching behaviour

There has been minimal switching activity in Western Australia over the past year.

- 33% say they have switched energy companies or plans in the past (15% in the last year). 67% say they have never switched.
- 36% say they have previously considered switching energy companies or plans but decided not to (25% in the last year).

Which of the following have you done?



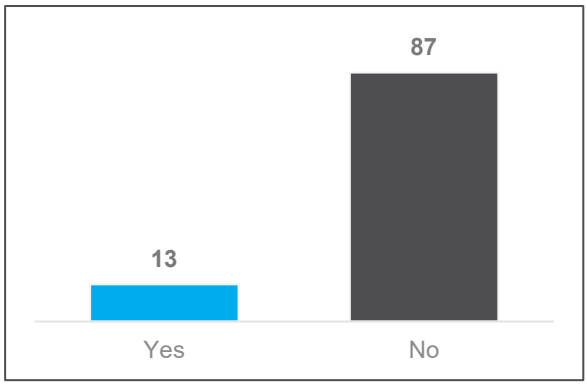
Activity

Reasons for considering switching

Being approached by a competitor is a common occurrence when considering switching among Western Australian consumers, but dissatisfaction with the value for money of their current deal is the largest factor.

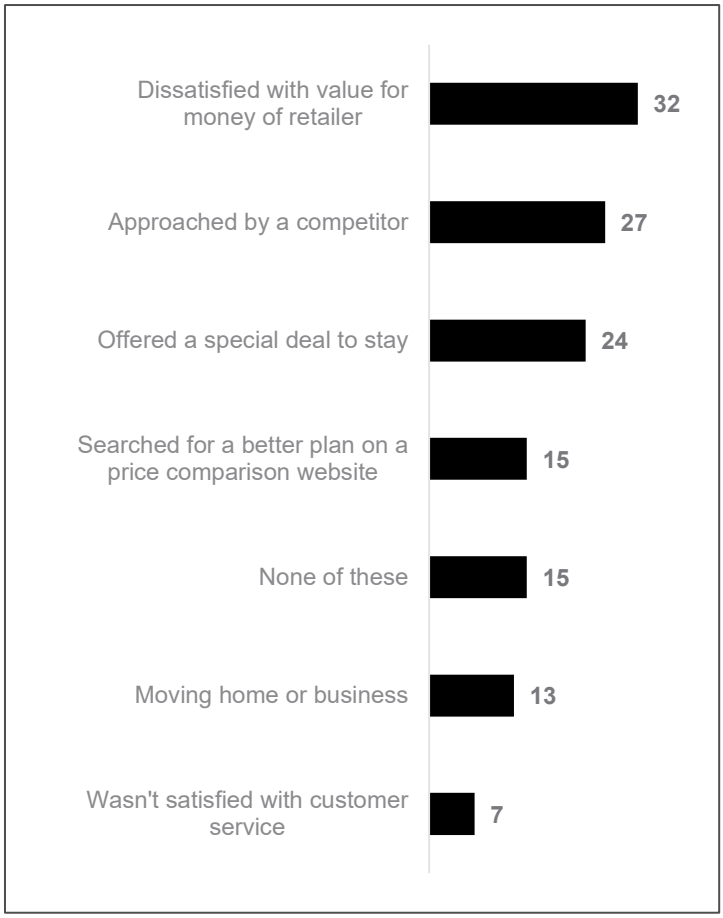
- 32% of those who have looked at switching said they were dissatisfied with the value for money of their retailer, and 27% said they were approached by a competitor.
- 13% plan to switch energy companies or plans in the next 12 months.

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



Base: All consumers (n=203)

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



Base: Consumers who have switched or looked at switching in the past (n=84)

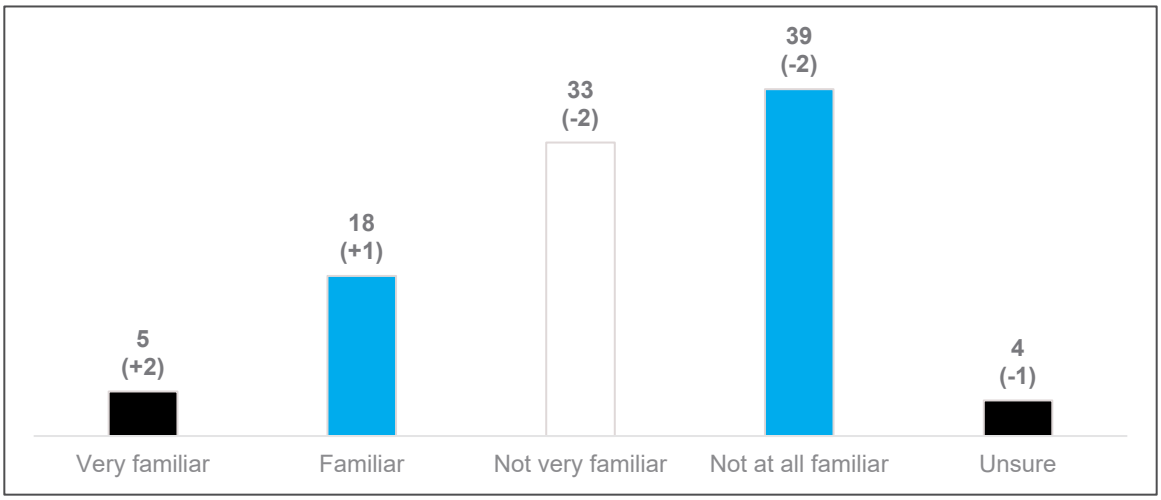
Note: Small sample size, results are indicative only

Other

Awareness of the Energy Ombudsman

23% 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?



CONFIDENTIAL

Energy Consumers Australia

Energy Consumer Sentiment Survey
November 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
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. Electricity generated by solar panels on your roof (not solar hot water)
4. A swimming pool or spa pool
5. Air conditioning (for cooling only)
6. Air conditioning (for cooling and heating)
7. A ducted evaporative cooling system
8. Gas central heating
9. A portable electric or gas heater
10. An electric vehicle
11. A dishwasher

[Yes / No]

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

U2A Which of the following do you have at your home?:

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

[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. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated in your home – especially solar electricity)
5. 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 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 U2A='no' 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. Electricity generated by solar panels on your roof (not solar hot water)
C. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity). An electric vehicle
D. A swimming pool or spa pool
E. Air conditioning (for cooling only)
F. Air conditioning (for cooling and heating)
G. Gas central heating
H. A ducted evaporative cooling system
I. A portable electric or gas heater
J. Appliances that are more energy efficient
K. A digital meter for your electricity supply, also known as a smart meter
L. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
M. A home energy management system (a product that monitors, controls or analyses

energy use in your home)

N. Solar hot water

O. 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. Electricity generated by solar panels on your roof (not solar hot water)

C. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity). Electric vehicles

D. 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]

A. Electricity generated by solar panels on your roof (not solar hot water)

B. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated on site – especially solar electricity). Here we mean devices such as the Tesla battery storage system but there are a range of brands.

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 in the last year?

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 for all options where A5a='no'

A5b Which of the following have you EVER 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 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

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

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

[For each]

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

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

C8. How strongly do you support or oppose the following?

A. Introducing a mandatory labelling scheme for all houses, where all houses would have to have a current energy efficiency rating

B. Increasing minimum standards for energy efficiency for rental properties, to ensure that they meet basic energy efficiency standards.

[Strongly support, somewhat support, neither support nor oppose, somewhat oppose, strongly oppose, unsure]

ASK ALL FOR DTYPE = 1

C9. As you may be aware, fuel economy labels on new vehicles include estimates of how much fuel a typical driver would use in that vehicle each year, and therefore the approximate annual cost of fuel for that vehicle. The same could be introduced for houses (including apartments & units), where every house could be given a label showing how much energy the home would be expected to use in a year, and therefore an estimated energy costs. How strongly do you agree or disagree with the following:

A. The house I live in at the moment would probably have a low energy efficiency rating
B. [Ask of those who own their houses @D13] If I found out that my home had a low energy efficiency rating, I would try to improve it
C. If I was deciding whether or not to buy a house, the energy efficiency rating would be a big factor I'd consider
D. [Ask of those who are renting @D13] If I was deciding whether or not to rent a house, the energy efficiency rating would be a big factor I'd consider
E. Home energy efficiency ratings would make managing my energy costs easier

[Strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, strongly disagree]

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 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

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

D14A How long have you lived there? (SR)

Please select one only

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

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

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

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

1. No, English only
2. Yes

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

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

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

Please record the NMI number or select '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