

**Energy
Consumers
Australia**
Energy Consumer
Sentiment Survey
June 2019

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Notes on methodology

This online survey was in the field from 14 to 29 March 2019.

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).

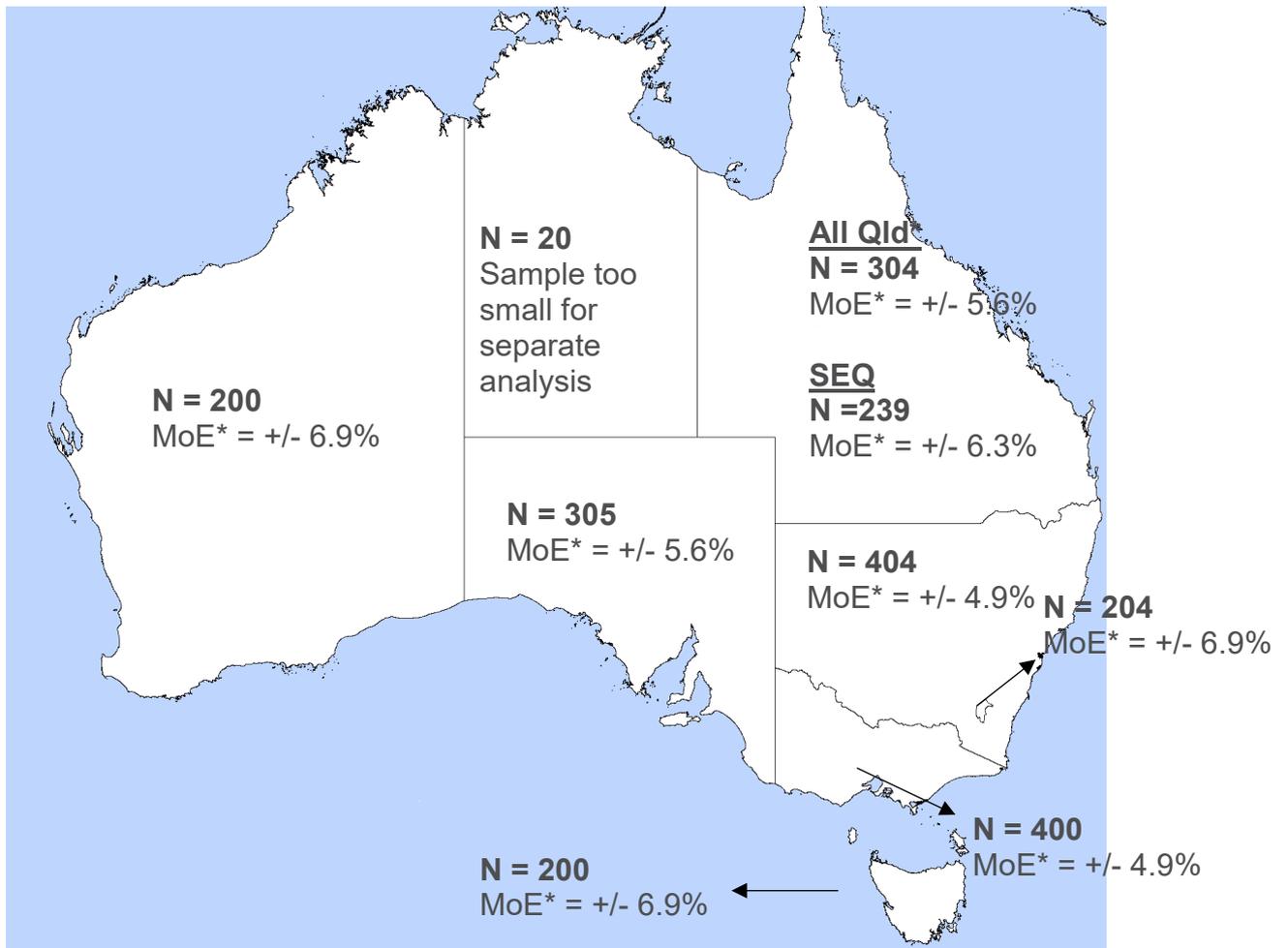
The comparison charts also often include a 'national average' for households.

- 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 June 2018 survey in brackets.

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

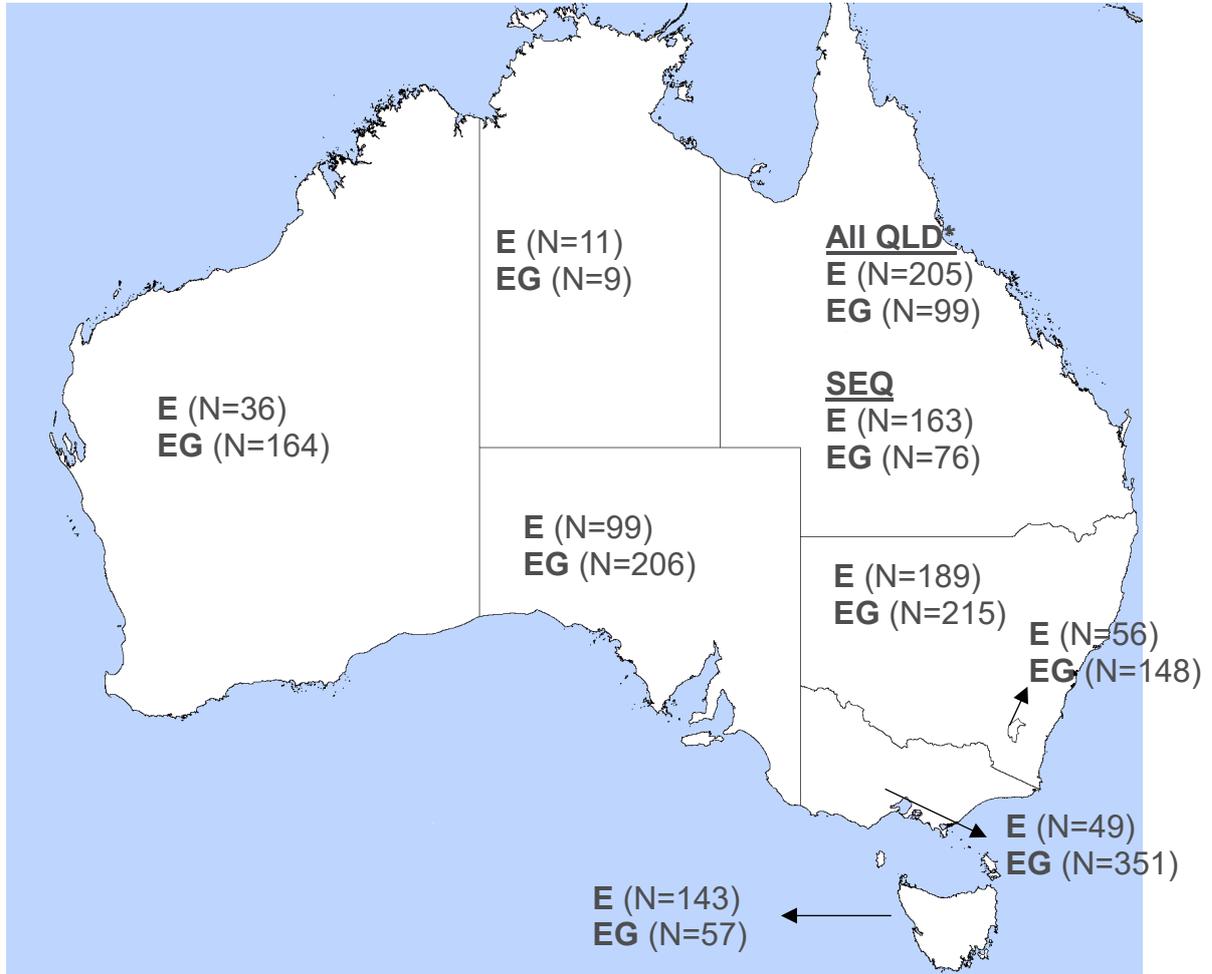
Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
N=285, MOE* = ±5.8%
(MOE = Margin of Error)
* 'All Qld' includes SEQ

Samples by energy types



KEY

E Only electricity

EG Electricity and gas

Plus nationwide:

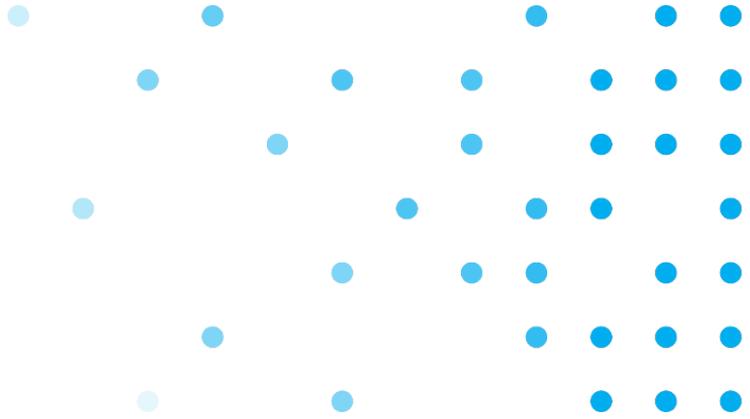
Businesses with less than 200 employees

E (N=119)

EG (N=166)

* 'All Qld' includes SEQ

Summary Findings



Summary of key findings

This is the seventh 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 June 2018.

- We compare results with Wave 5 rather than with Wave 6 because of a potential seasonal effect in the data noted in the early waves of this survey. The tendency was for satisfaction measures to improve in summer (odd numbered waves) and deteriorate in winter (even numbered waves).

Movements in the national satisfaction numbers for households are generally small, but this often masks larger movements within the states and territories.

- Overall household satisfaction with electricity and gas services is down 7% in NSW but up 8% in South Australia.
- Satisfaction with the value for money of electricity is essentially unchanged in NSW and Victoria, but up in all other states and territories, most notably up 10% in Queensland and up 8% in South Australia.
- Similarly, satisfaction with the value for money of gas is down in Victoria but up in Western Australia, South Australia, Tasmania and the ACT.

Household satisfaction with the value for money of electricity remains behind all other comparable services in every state and territory

Household confidence that the market is working in consumers' interests is up in most states and territories relative to a year ago. However, this is off a low base and confidence levels remain at between 17% and 36% depending on the jurisdiction.

- Consumers have also become more confident that the market will deliver better value for money in the future but again, this is off a low base and confidence levels remain between 20-39% across the states and territories.

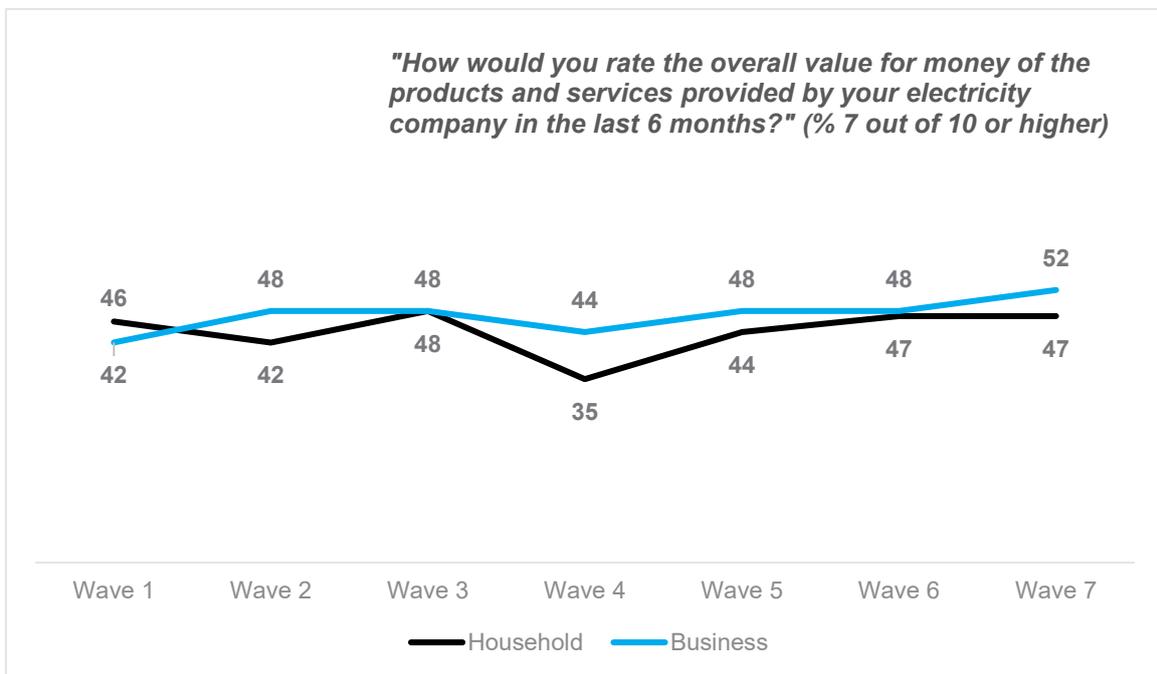
Nationally, small businesses satisfaction with electricity on all measures is up relative to a year ago and the gap is closing with comparable services.

Trends

Long-term findings

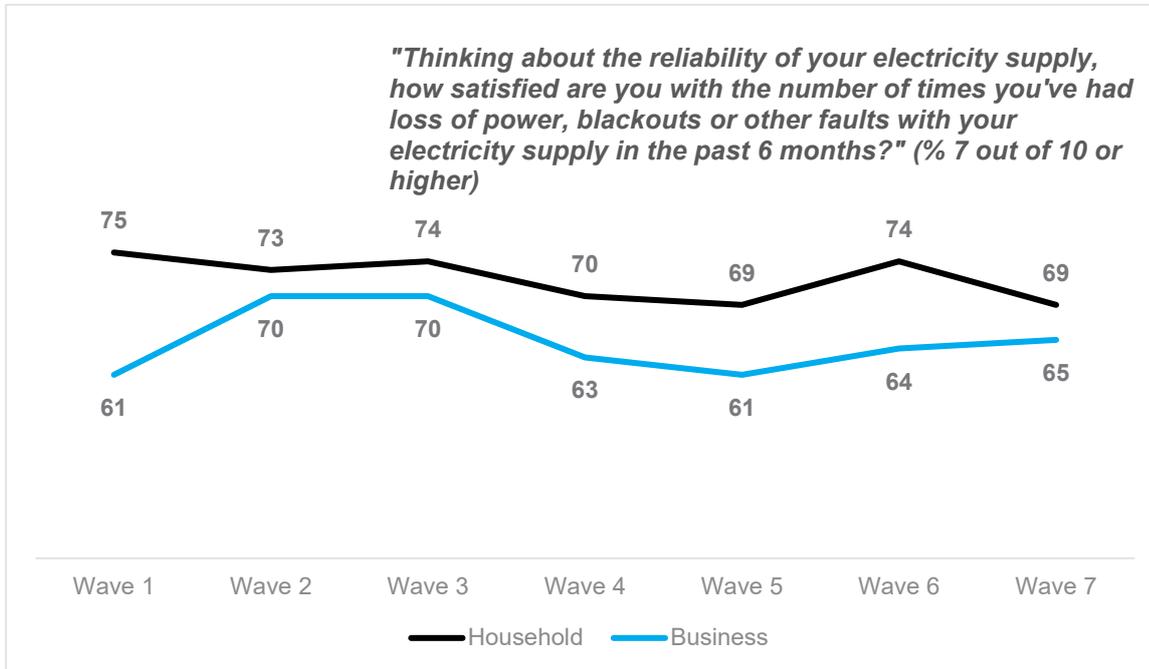
Overall satisfaction with value for money from electricity companies has increased for business consumers by 10% to 52% - the highest rating since Wave 1.

Household satisfaction with the value for money of their electricity service is up 1% to 47% - the equal second highest rating since Wave 1.



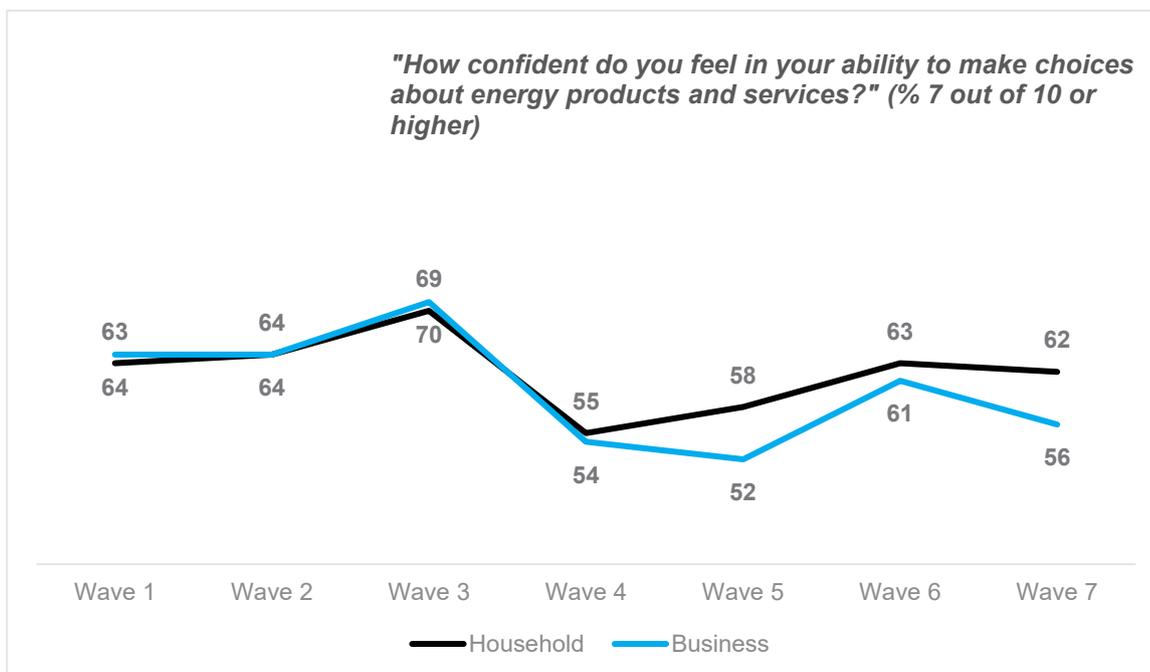
Base: All Household & Business consumers.

Satisfaction with the reliability of electricity supply is down 6% amongst households at 69% while small business satisfaction is up 4% to 65%.



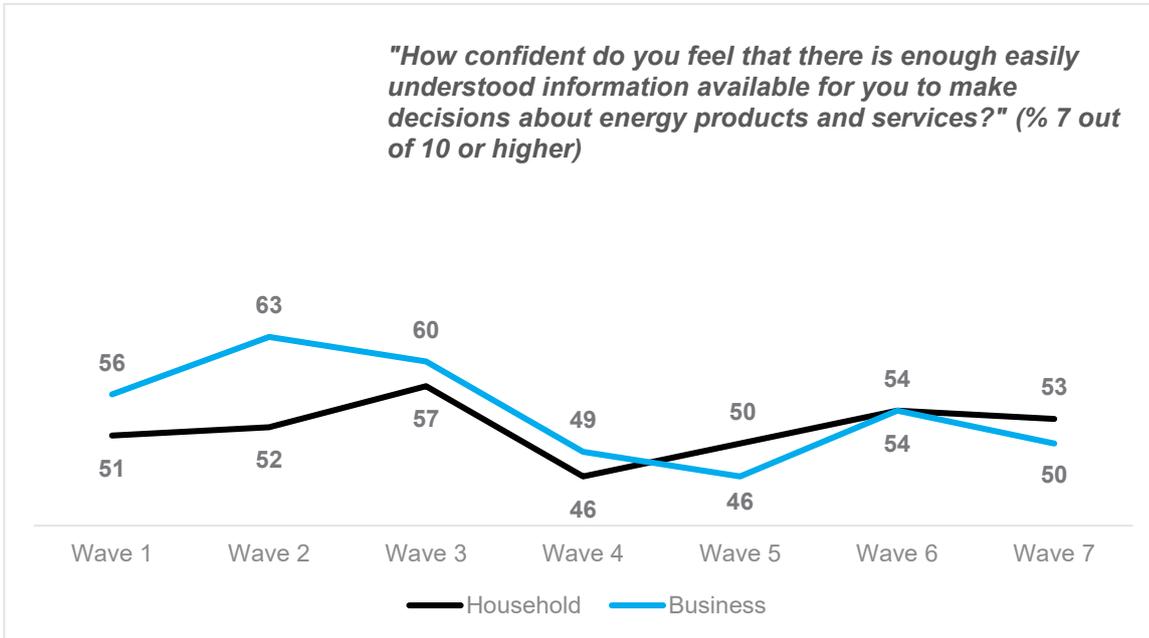
Base: All Household & Business consumers.

Small businesses confidence in their own ability to make energy choices has dropped 7% to 56% in Wave 7. Household confidence has not changed significantly since Wave 1 (down 2% to 62%).



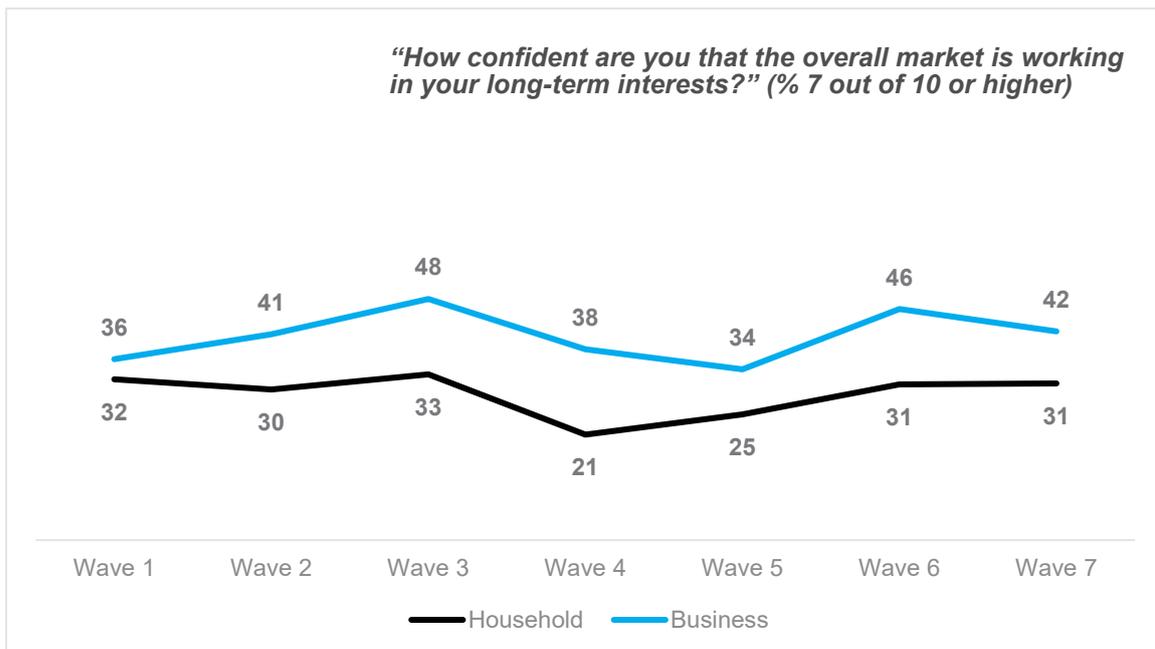
Base: All Household & Business consumers.

Small business confidence in the availability of information has fallen by 6% since Wave 1, to 50% in Wave 7, while household confidence is up 2% over the same time.



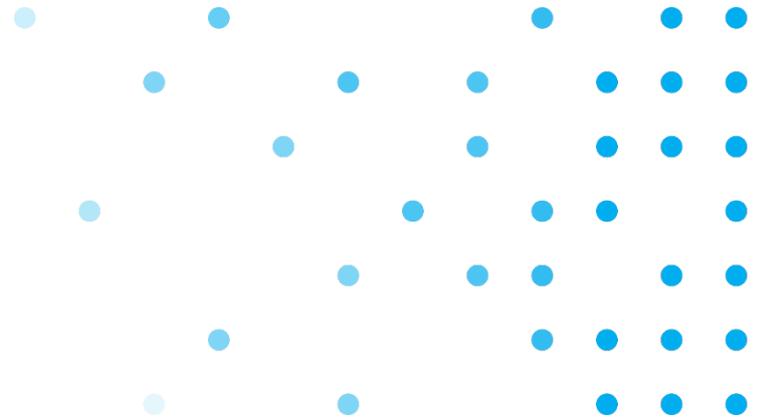
Base: All Household & Business consumers.

Household confidence that the energy market is working in the long-term interests of consumers remains largely unchanged since Wave 1, at 31% in Wave 7. Confidence among businesses has risen by 6% to 42%.



Base: All Household & Business consumers.

National findings



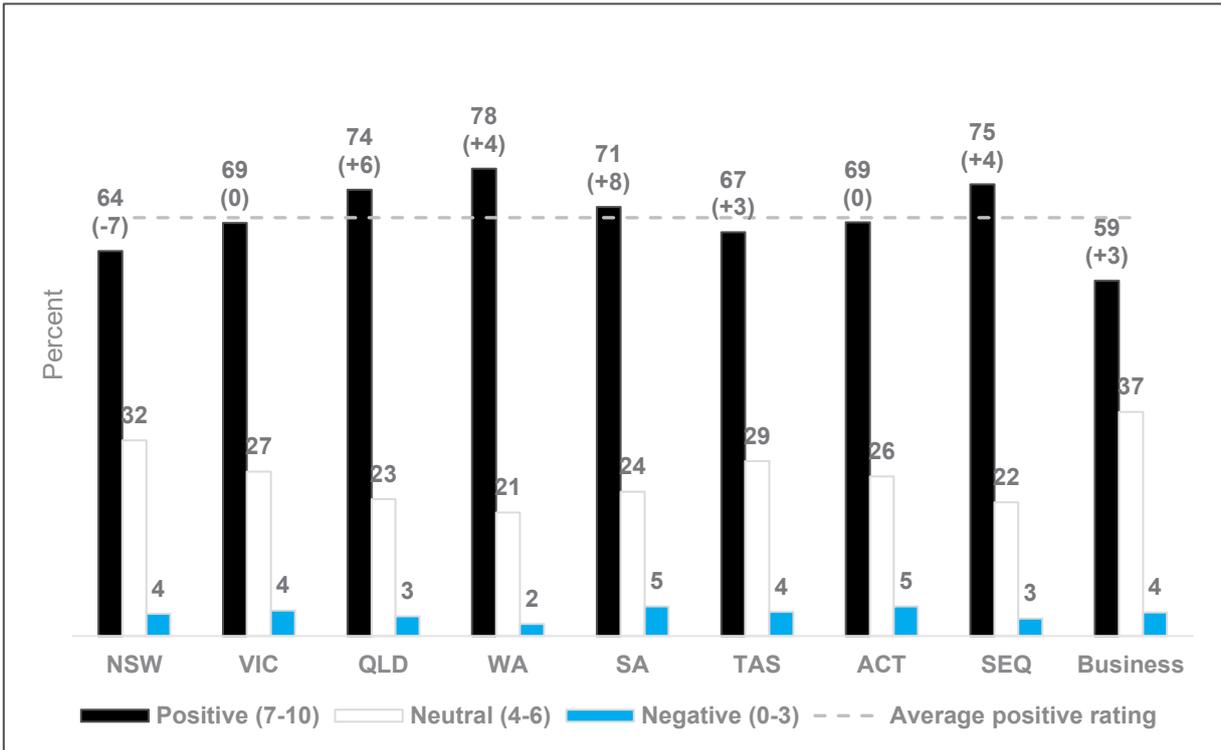
Satisfaction

Overall satisfaction

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

- The largest increases were in South Australia (up 8% to 71%) and in Queensland (up 6% to 74%).
- Satisfaction among small business consumers increased by 3% to 59%.
- Satisfaction decreased in New South Wales (down 7% to 64%), which is now the lowest satisfaction level among states and territories.

How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Household consumers (n=2,037), Small business consumers (n=285)

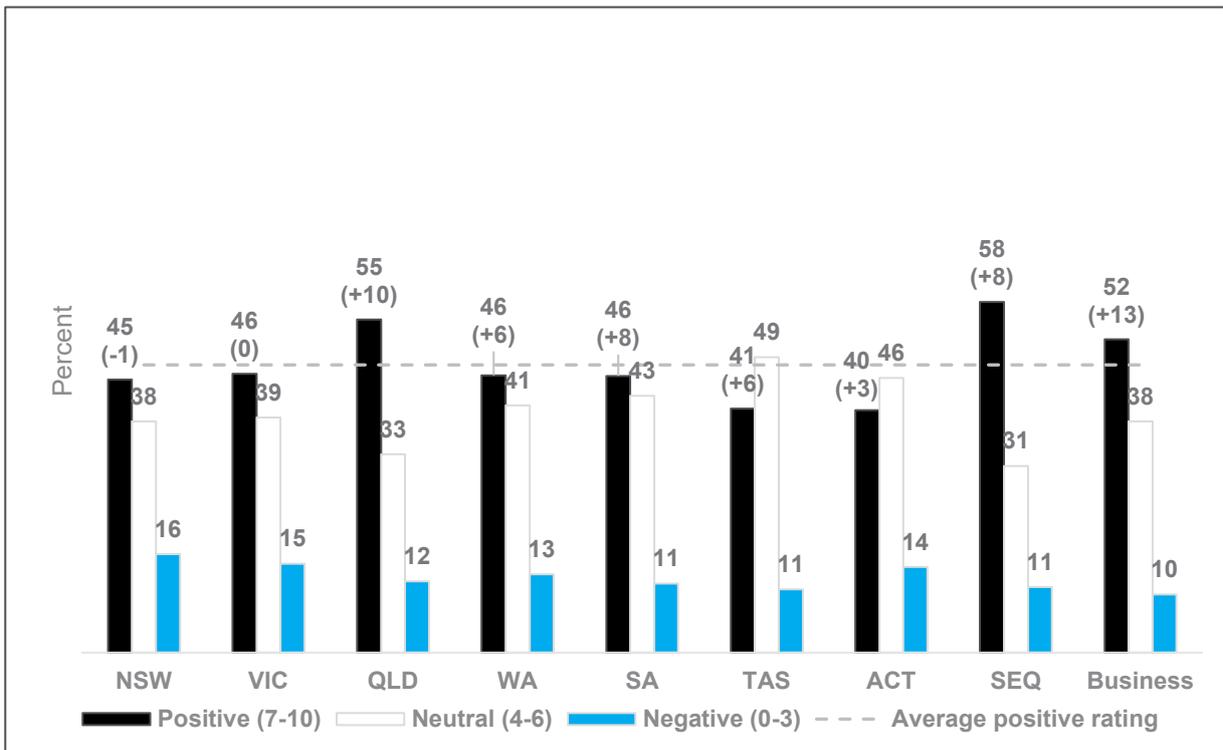
Overall value for money (Electricity)

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

The biggest increases in satisfaction were:

- In Queensland (up 10% to 55% overall, and up 8% in South East Queensland) and in South Australia up 8% to 46%
- Among small business consumers (up 13% to 52%).

*How would you rate the overall value for money of the products and services provided by your electricity company in the last 6 months?
0-10 scale, 0='very poor', 10='excellent'*



Base: Household consumers (n=2,037), Small business consumers (n=285)

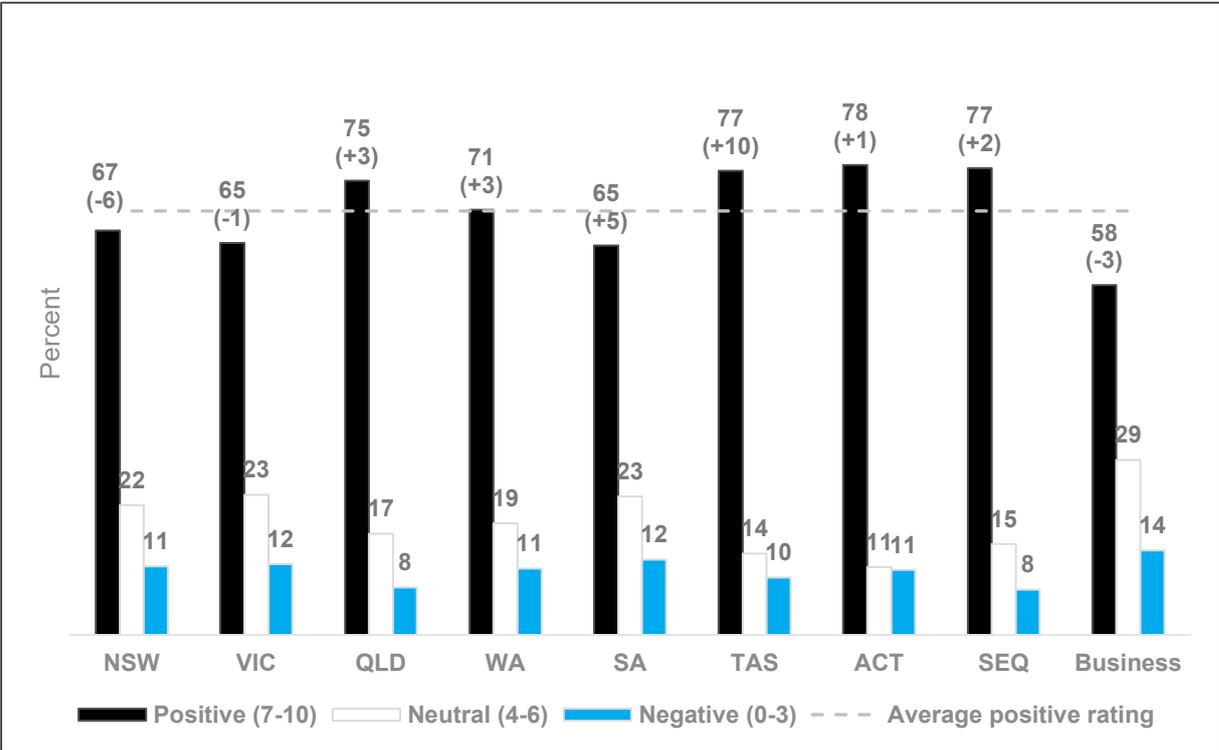
Satisfaction

Reliability (Electricity)

The change in satisfaction with the reliability of electricity was mostly unchanged except in Tasmania and New South Wales.

- The increase in satisfaction in Tasmania was 10% up to 77%.
- The decrease in New South Wales was 6% down to 67%. The previous low for New South Wales was 72% in both Wave 1 and Wave 2.

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



Base: Household consumers (n=2,037), Small business consumers (n=285)

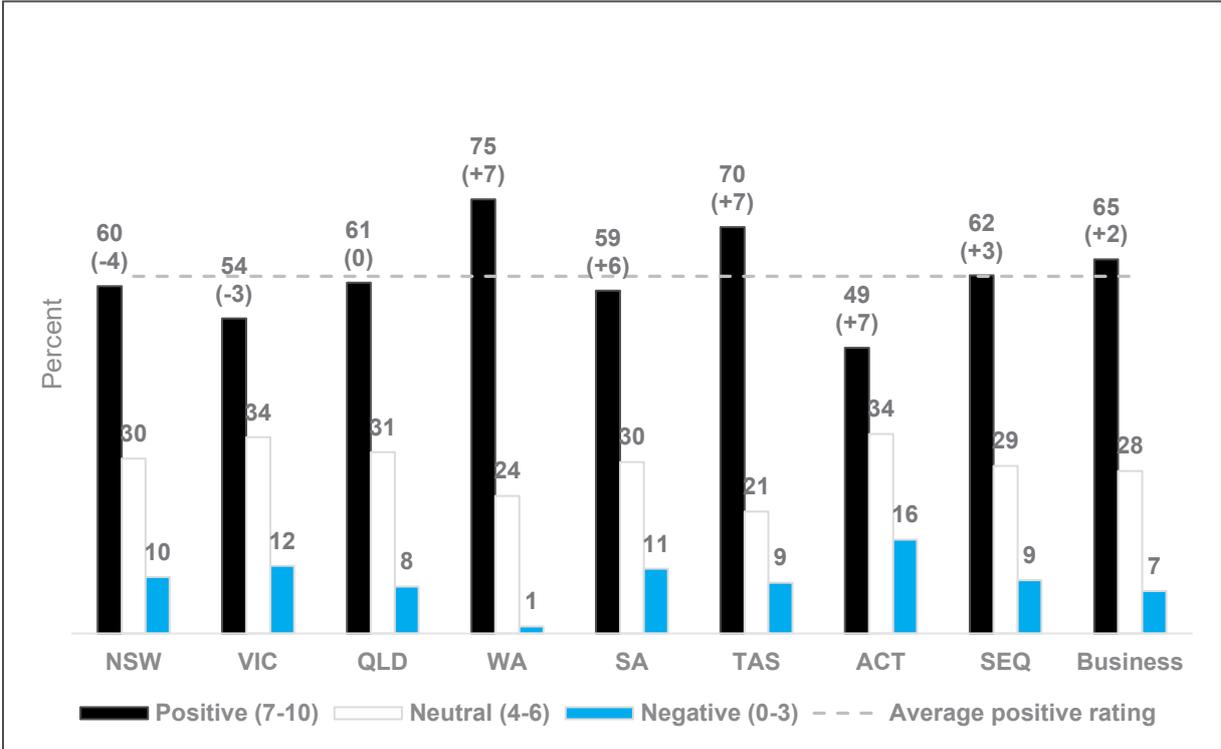
Satisfaction

Overall value for money (Gas)

Satisfaction with value for money of gas is either steady or up in most states and territories.

- There was a 7% increase in ACT, Tasmania and Western Australia, and a 6% increase in South Australia.
- Satisfaction with value for money of gas was, however, down 4% in New South Wales and 3% in Victoria.

How would you rate the overall value for money of the products and services provided by your gas company in the last 6 months?
0-10 scale, 0='very poor', 10='excellent'



Base: Household consumers (n=1,249), Small business consumers (n=166)

Note: Small sample size for Tasmania (n=57), Queensland (n=99) and SE Queensland (n=76)

Satisfaction

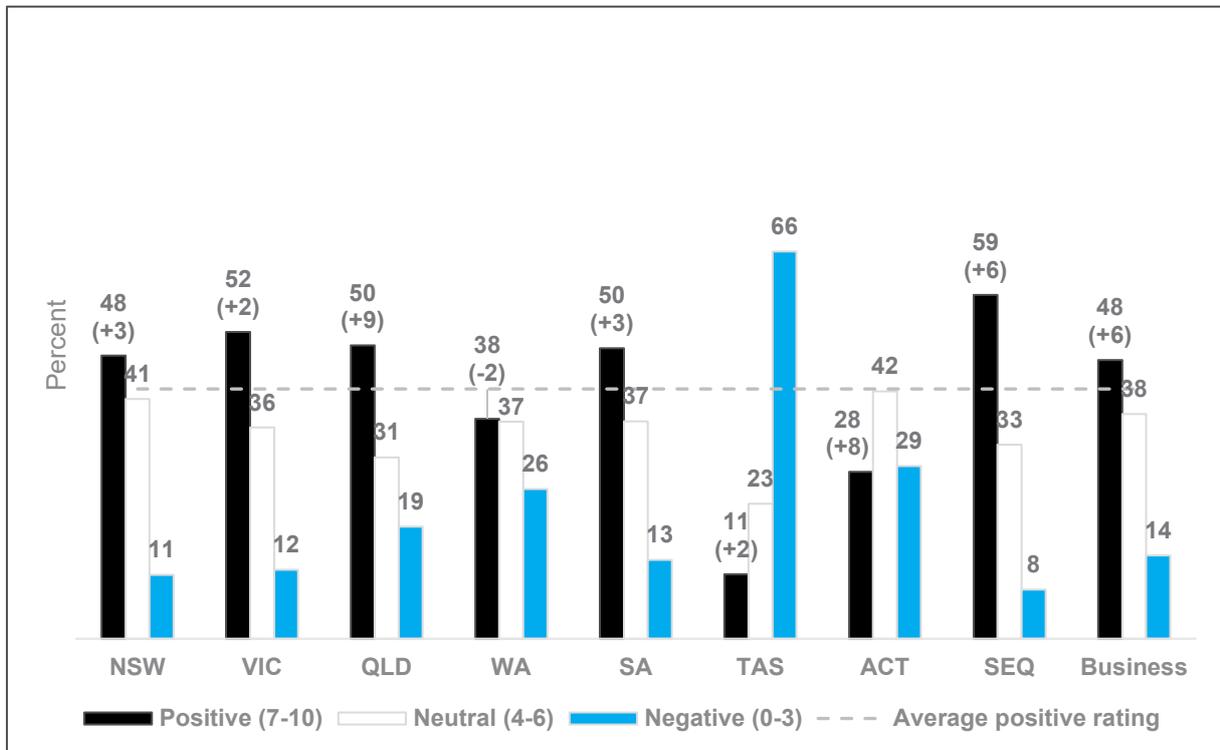
Level of competition

Satisfaction with levels of competition in the energy market is up in all markets except for Western Australia.

- The largest increases in satisfaction were in Queensland (up 9% to 50%) and the ACT (up 8% to 28%).

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

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



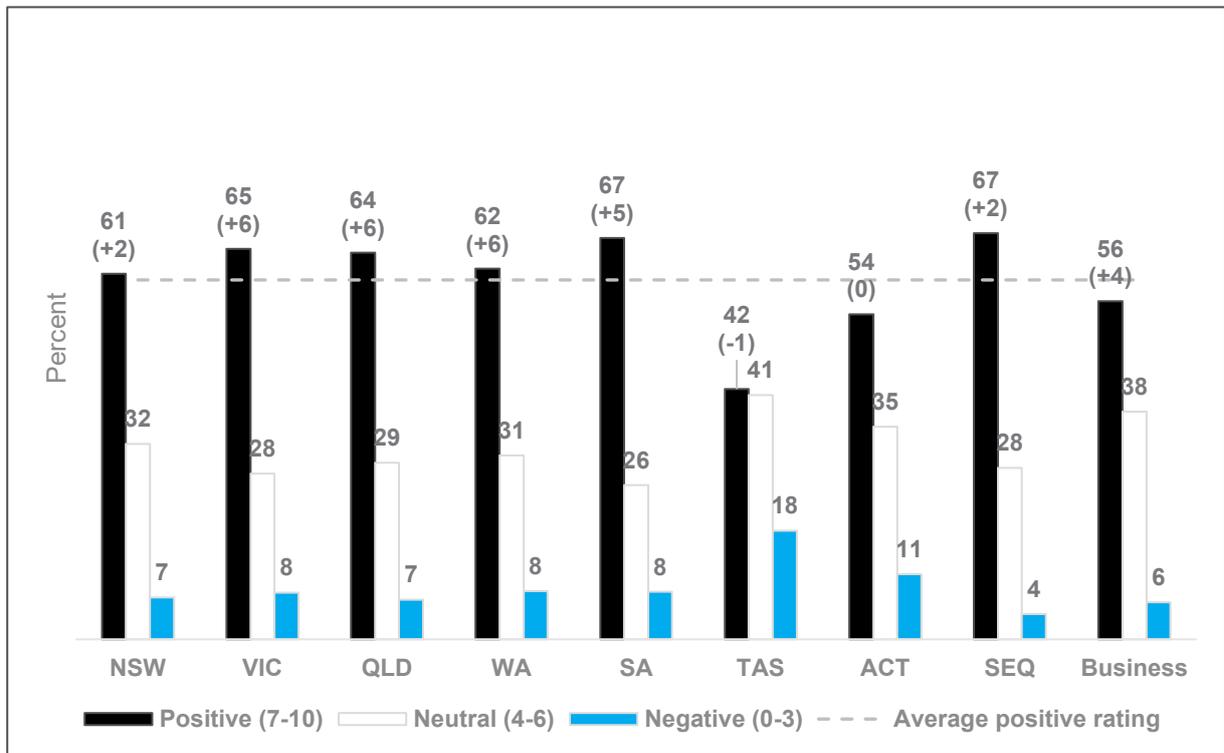
Base: Household consumers (n=2,037), Small business consumers (n=285).

Consumer confidence in their abilities

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

- Three states saw a 6% increase on this measure - Victoria (to 65%), Queensland (to 64%), and Western Australia (to 62%).
- Satisfaction was essentially unchanged in the ACT (54%) and Tasmania (down 1% to 42%).

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



Base: Household consumers (n=2,037), Small business consumers (n=285).

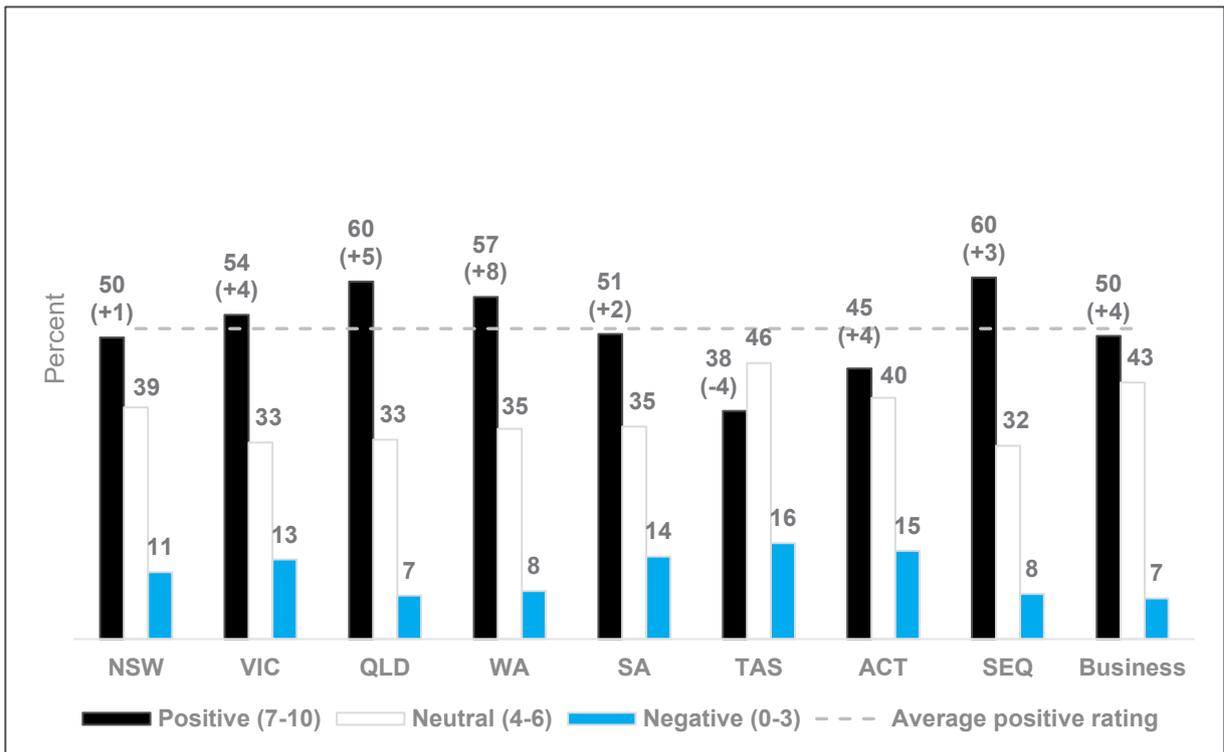
Confidence

Confidence in the availability of information

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

- The largest increases were in Western Australia (up 8% to 57%) and Queensland (up 5% to 60%).
- The only decrease was in Tasmania (down 4% to 38%). Confidence in the availability of information continues to be 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?
0-10 scale, 0='not at all confident', 10='very confident'



Base: Household consumers (n=2,037), Small business consumers (n=285).

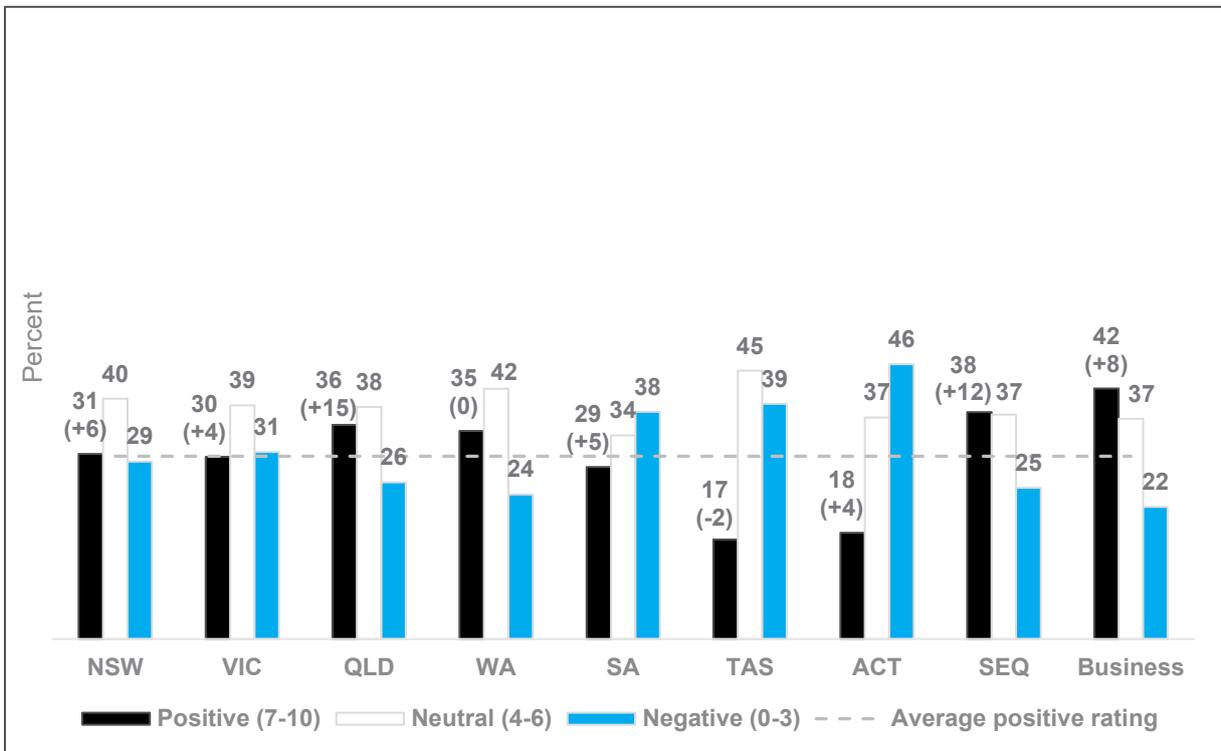
Confidence

Confidence in the market

Consumer confidence that the energy market is working in their long-term interest has increased significantly in Queensland.

- Confidence was up 15% in Queensland (to 36%) and up 12% in South East Queensland (to 38%) taking the state from one of the lowest levels of confidence to the highest.
- Notwithstanding increases in most states and territories, confidence in the market remains low, with fewer than 4 in 10 people agreeing the market works in their long-term interest in all jurisdictions.
- Less than 2 in 10 household consumers say the market works in their interests in Tasmania (17%) and the ACT (18%).

How confident do you feel that the overall market is working in your long-term interests? By 'market' we mean the energy industry and energy regulators
0-10 scale, 0='not at all confident', 10='very confident'



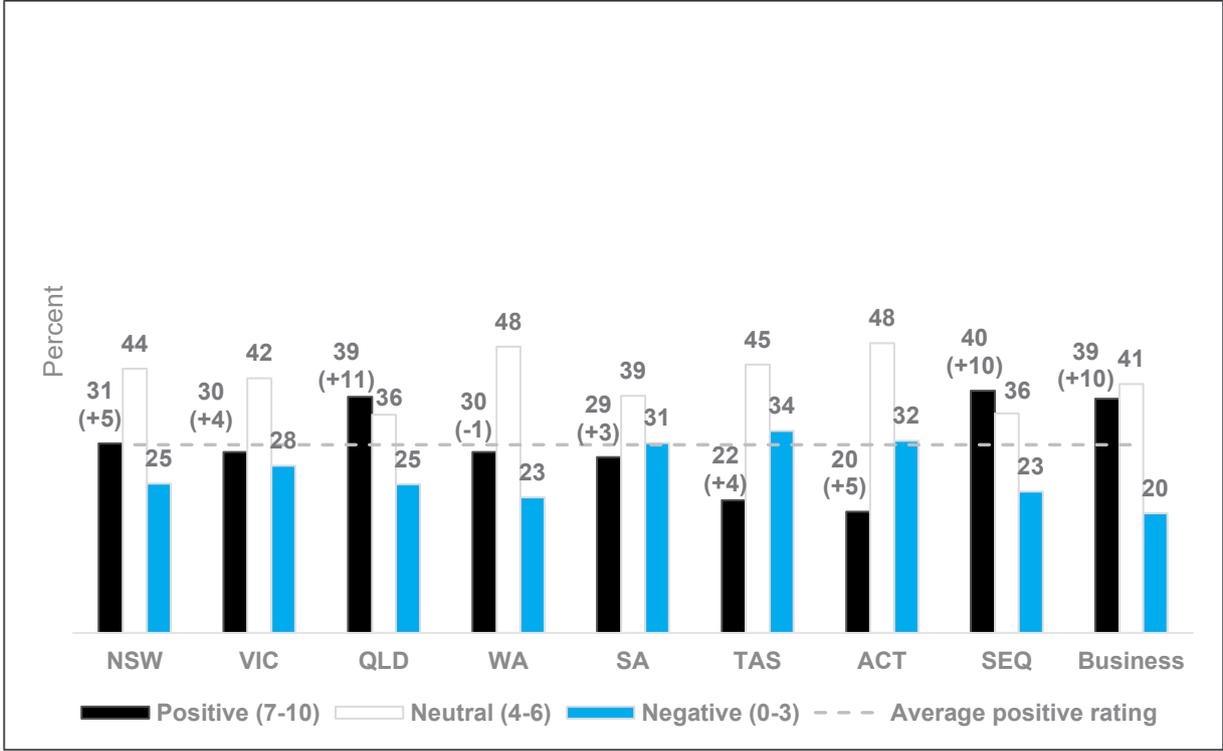
Base: Household consumers (n=2,037), Small business consumers (n=285).

Confidence in the future value for money

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

- Increases were largest in Queensland (up 11% to 39% overall, and up 10% to 40% in South East Queensland).
- Confidence has increased by 10% (to 39%) 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'



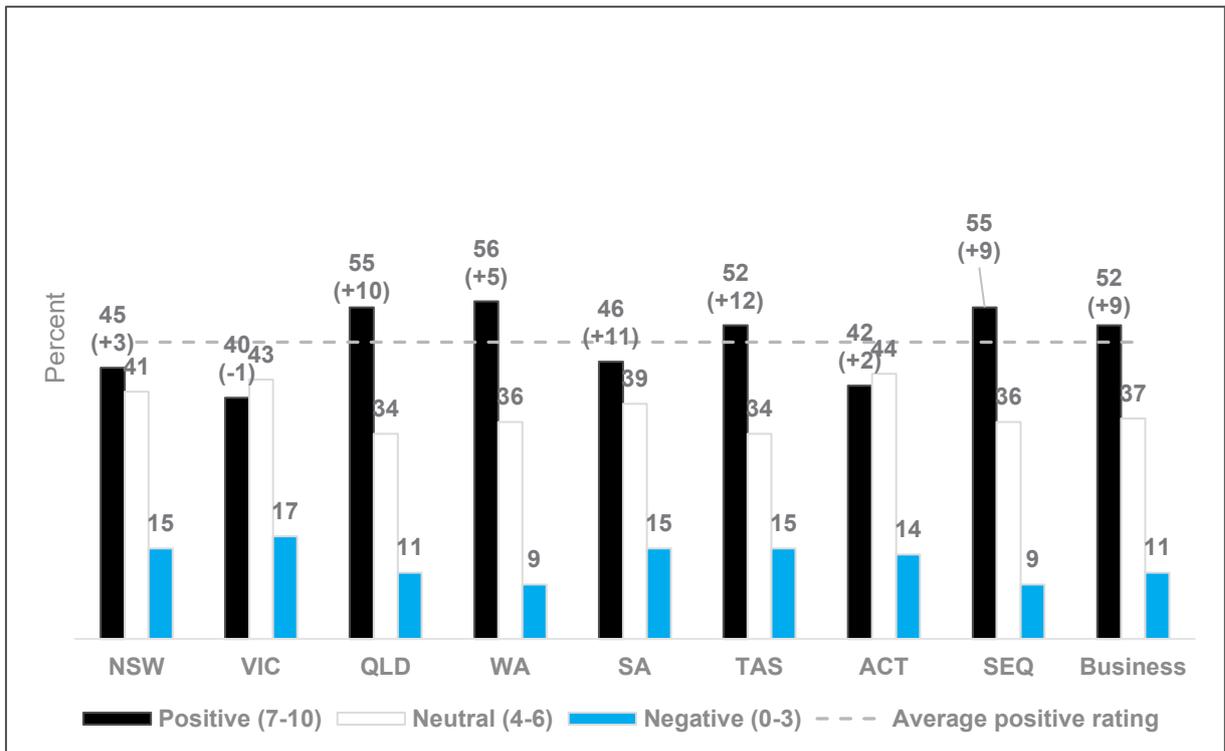
Base: Household consumers (n=2,037), Small business consumers (n=285).

Confidence in future reliability

The proportion of consumers expressing confidence that the market will deliver increased reliability has increased in all markets other than Victoria.

- There were double-digit increases in confidence in Queensland (up 10% to 55%), South Australia (up 11% to 46%) and Tasmania (up 12% to 52%).
- Confidence among small businesses has increased by 9% to 52%.

How confident do you feel that the energy market will provide better outcomes for you in 5 years, in terms of reliability of power supply? By 'market' we mean the energy industry and energy regulators
0-10 scale, 0='not at all confident', 10='very confident'



Base: Household consumers (n=2,037), Small business consumers (n=285).

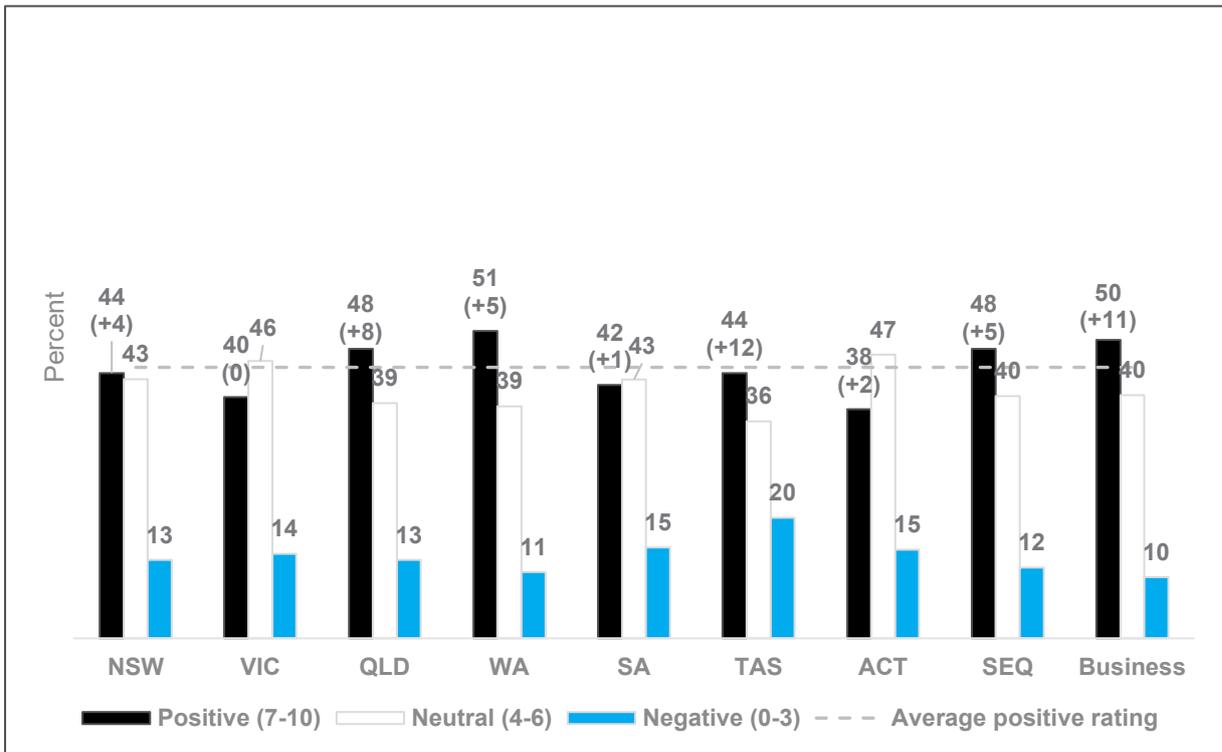
Confidence

Confidence in future technology

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

- Increases were largest in TAS (up 12% to 44%) and among small business consumers (up 11% to 50%).

*Thinking about the overall market outcomes, how confident are you that the energy market will provide better outcomes for you in 5 years, in terms of technological advances to manage your energy supply and costs?
0-10 scale, 0='not at all confident', 10='very confident'*



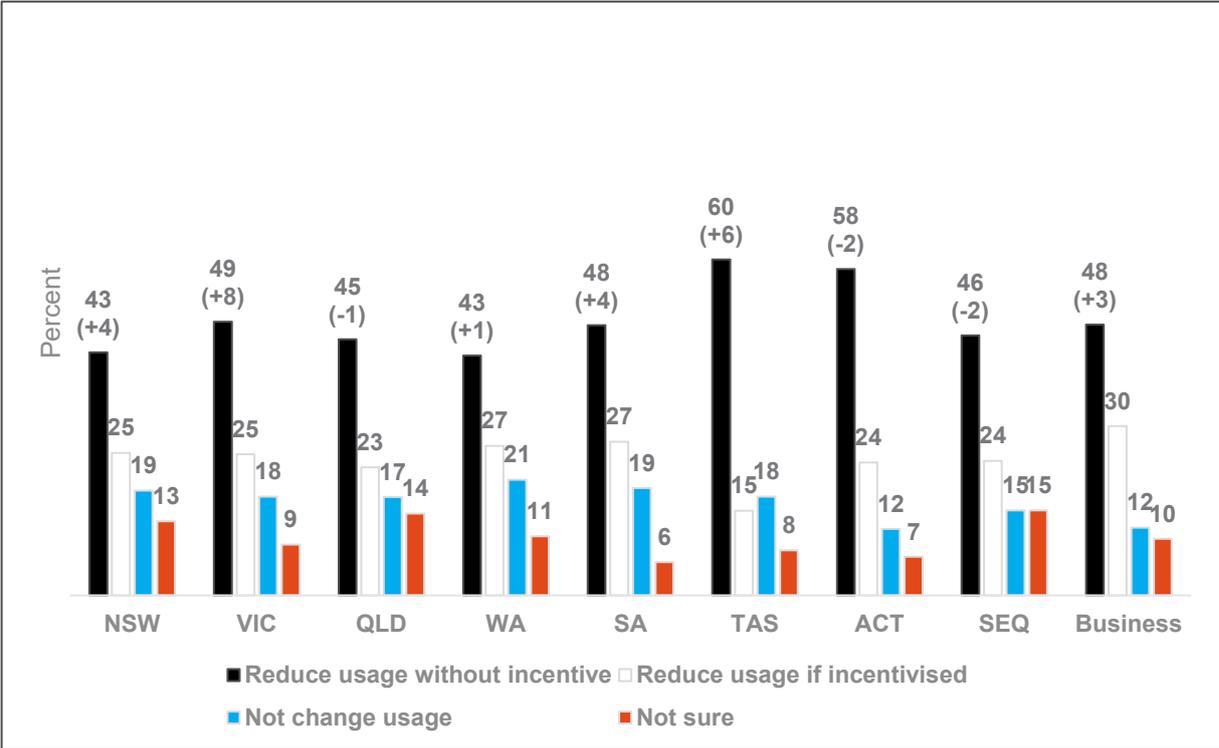
Base: Household consumers (n=2,037), Small business consumers (n=285).

Energy use reduction campaigns

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

- 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.
- About one in four household consumers would require an incentive to do so.

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



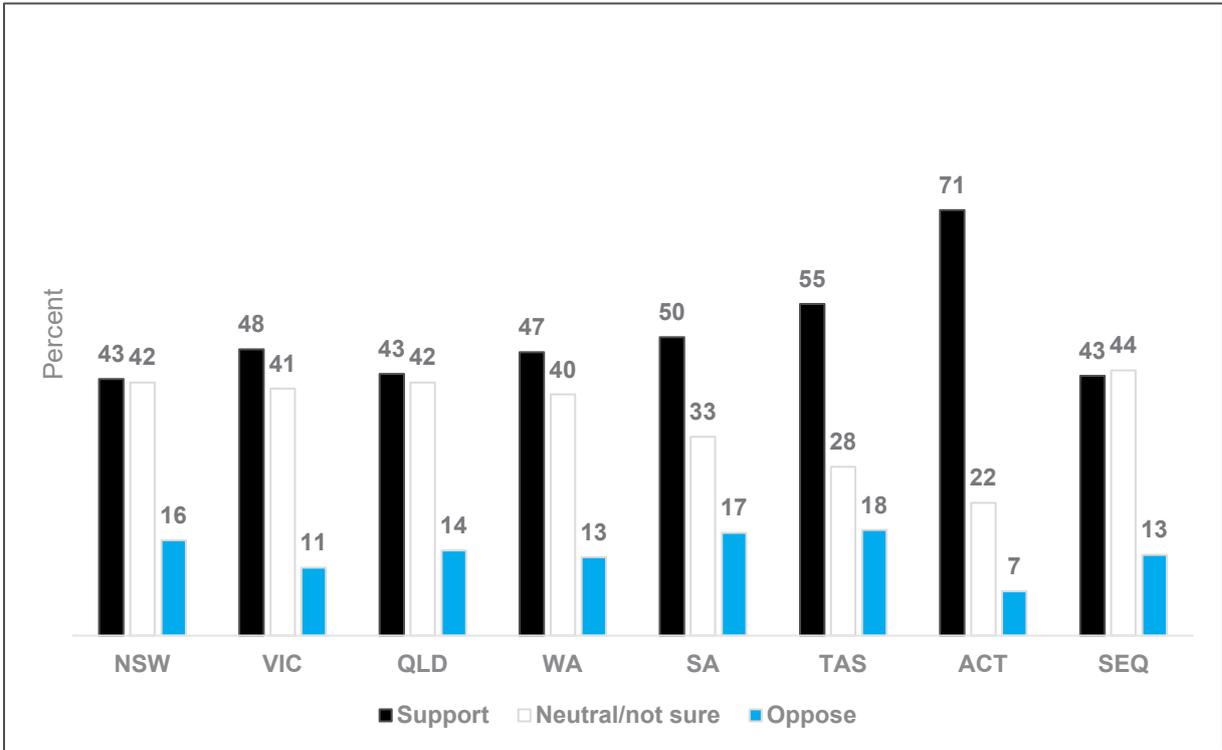
Base: Household consumers (n=2,037), Small business consumers (n=285).

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 71% said they supported the idea.
- In other markets, support ranged from a low of 43% (NSW, QLD) to 55% (TAS).

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



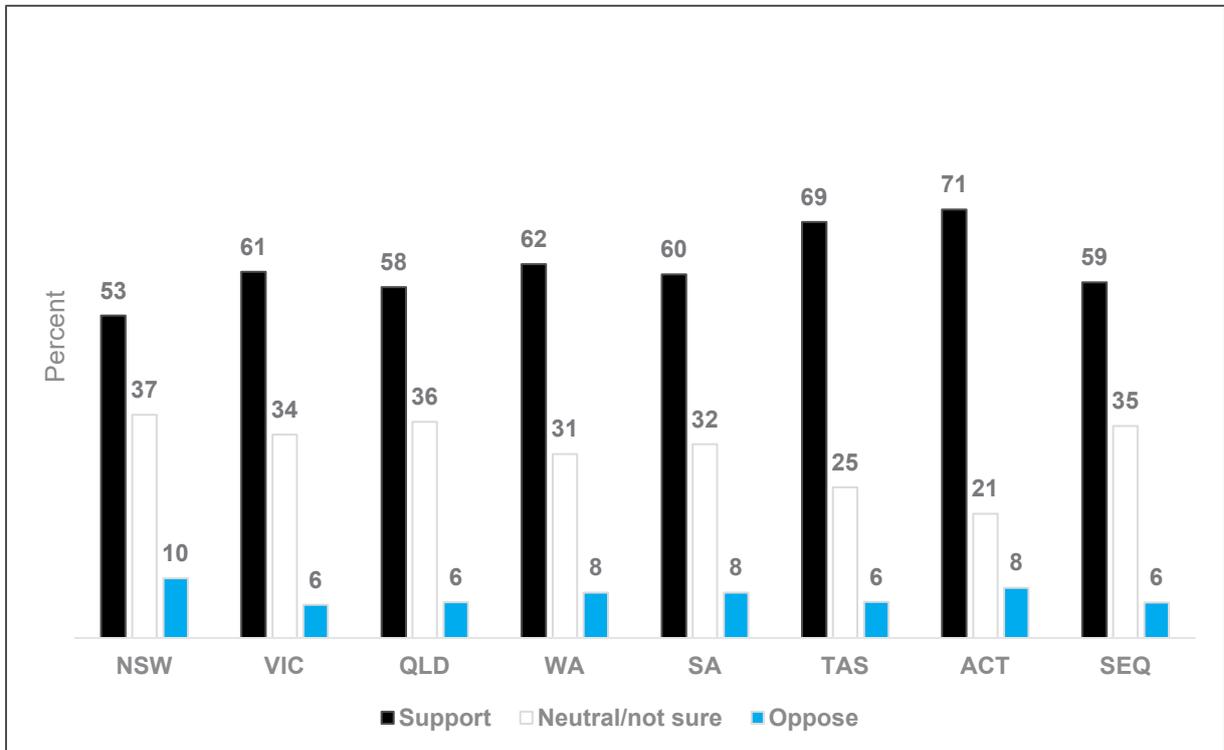
Base: Household consumers (n=2,037)

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 the ACT (71% support) and Tasmania (69%), and lowest in NSW (53%).
- Of those who do not support the initiative, most are neutral or unsure – only 1 in 10 or fewer oppose the measure in each market.

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



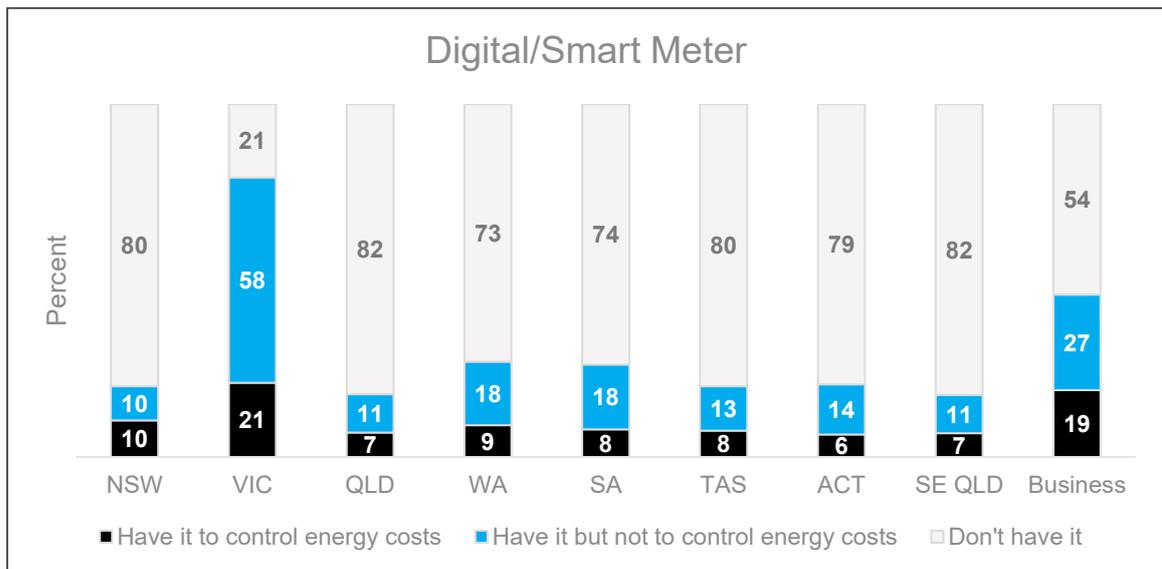
Base: Household consumers (n=2,037)

Technology to control energy costs

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

- In Victoria, smart meters were rolled out through a State Government program, but only about one quarter of household consumers who report having a smart meter say that they use it to control energy costs.
- Small businesses also report a relatively high uptake of smart meters (46%) but again, a minority use the device to manage their energy costs.
- In other states and territories, between 18% (QLD) and 27% (WA) report having a smart meter. Again, a large number of these do not use the device to manage their energy costs.

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

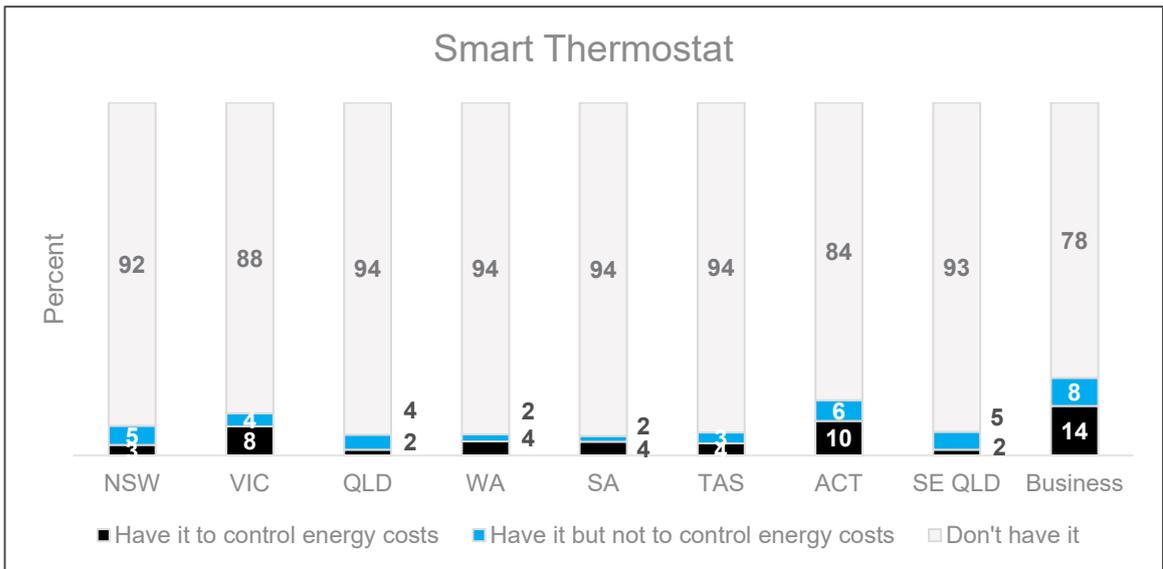


Base: Household consumers (n=2,037), Small business consumers (n=285)

Continued on following page

- Smart thermostats are most common among small business - 22% have one, but 14% of small businesses use the technology to control their energy costs.

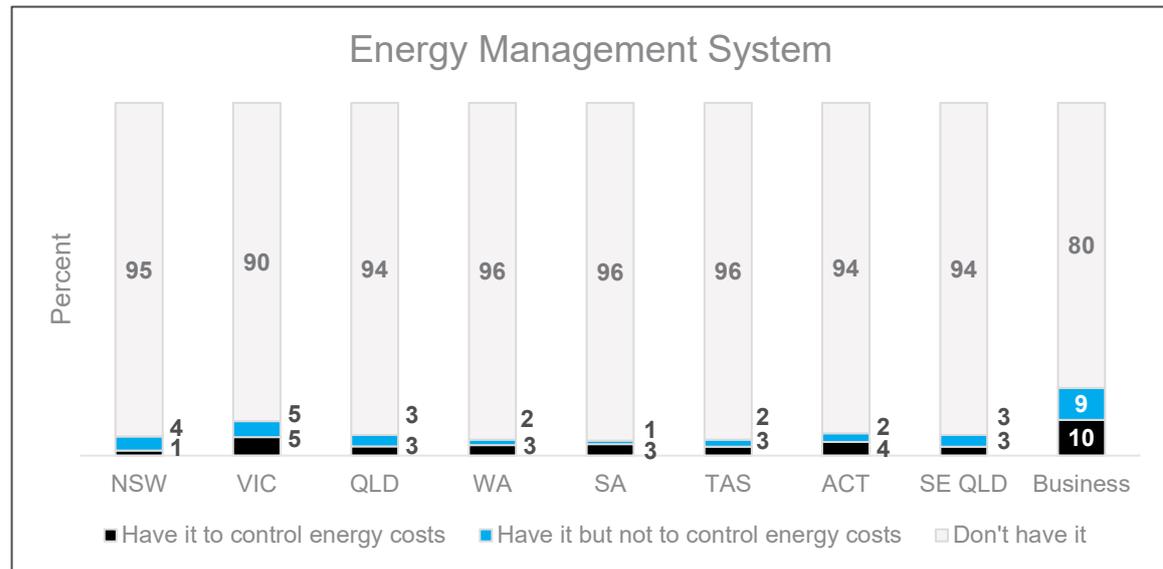
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs?



Base: Household consumers (n=2,037), Small business consumers (n=285)

- 19% of small business users say they have an energy management system, while uptake is 10% or lower among households in all jurisdictions.

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?



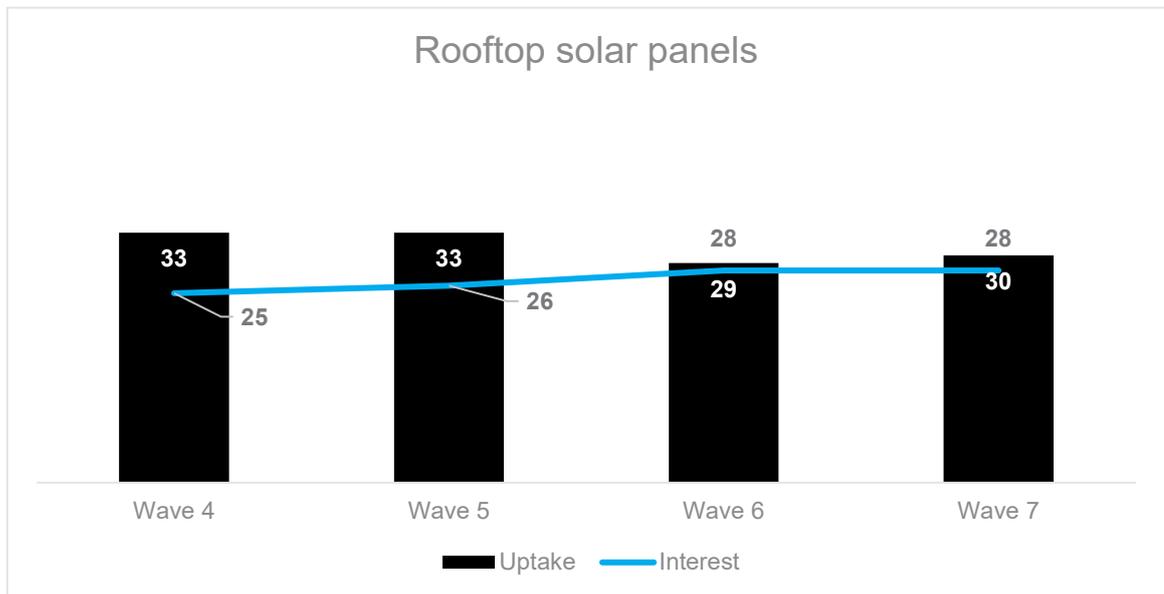
Uptake of energy efficient technologies

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.

All data below is national (all businesses and households). Trends are not included from earlier than wave 4 due to methodology changes. The interest in each technology is of all consumers, whereas the uptake of energy efficient technologies is among those who do not already have the technology, but have expressed interest in purchasing it in the future.

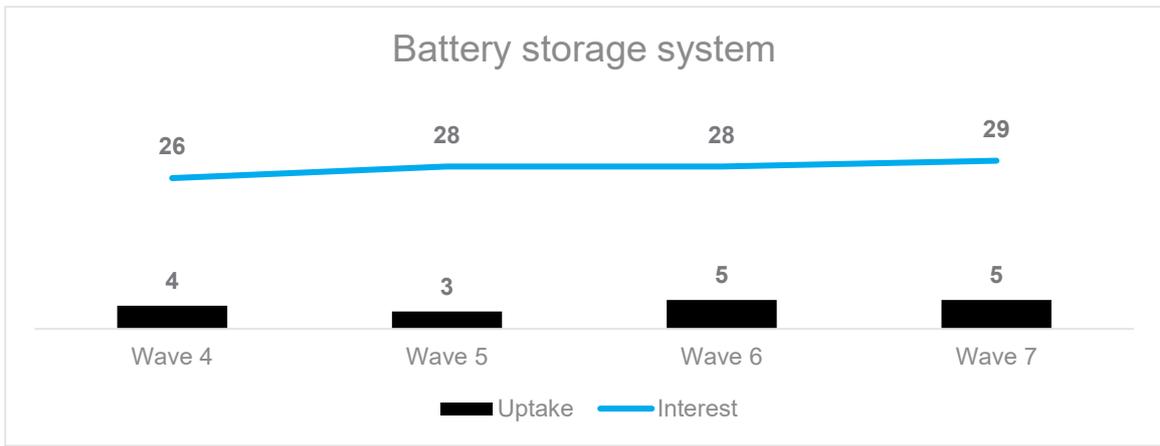
Uptake and interest of rooftop solar panels is among the highest of the energy efficient technologies, with 30% of respondents reporting they have this product, and 28% of those without panels considering them in wave 7.

Despite having a low uptake (5%), there is high interest in battery storage technology, with 29% of those currently without the product showing an interest.

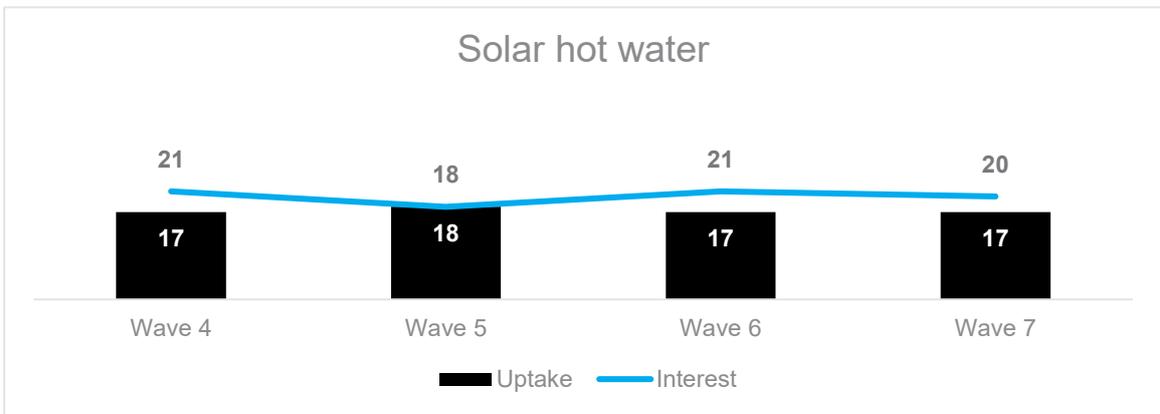


Uptake Base: All Household consumers

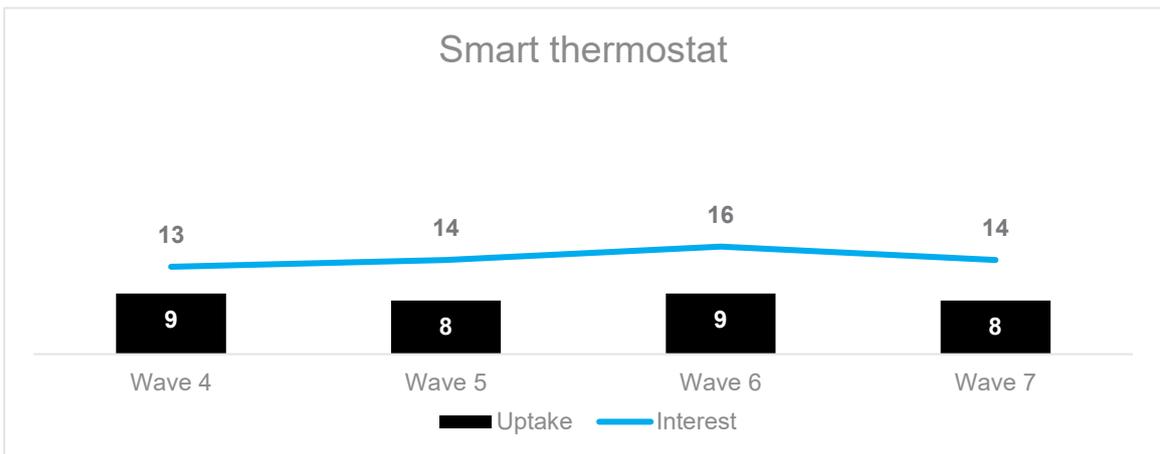
Interest Base: All Household consumers which do not own product



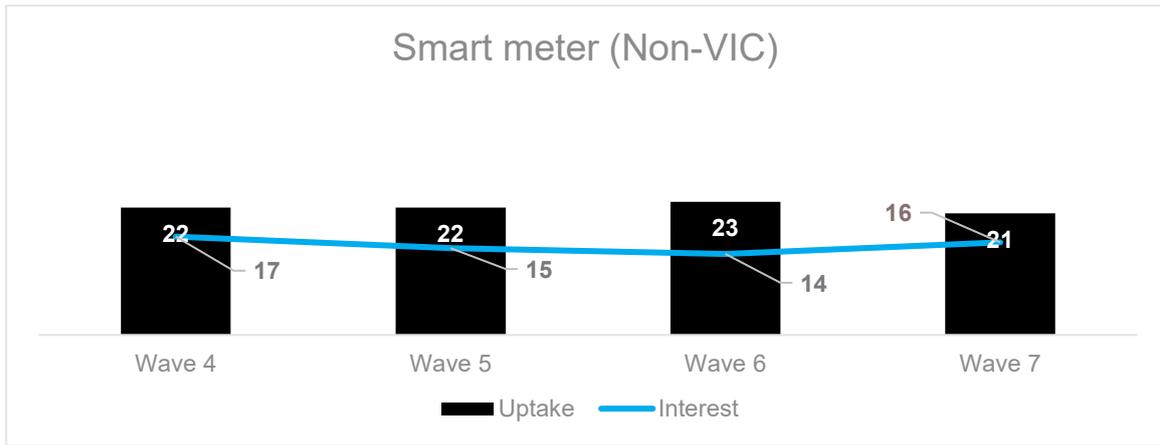
Uptake Base: All Household consumers
Interest Base: All Household consumers who do not own product



Uptake Base: All Household consumers
Interest Base: All Household consumers who do not own product

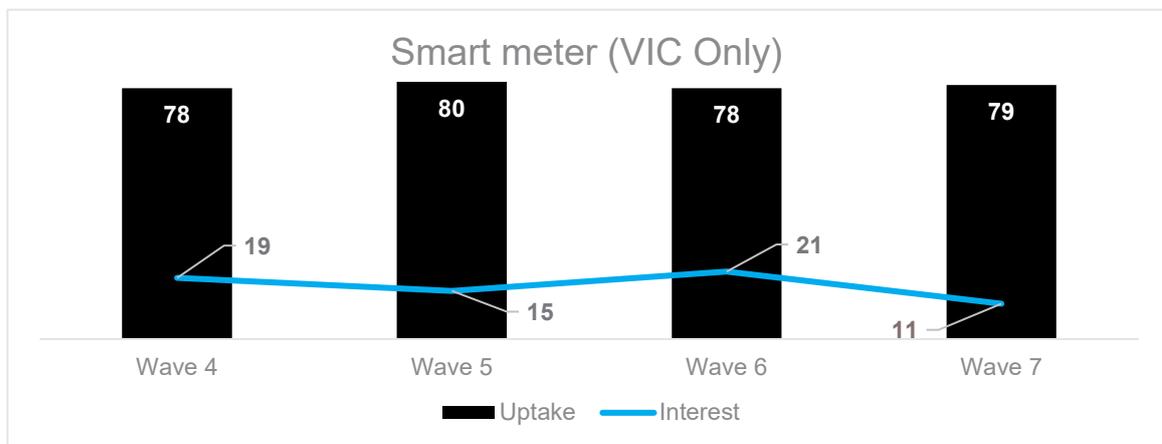


Uptake Base: All Household consumers
Interest Base: All Household consumers who do not own product



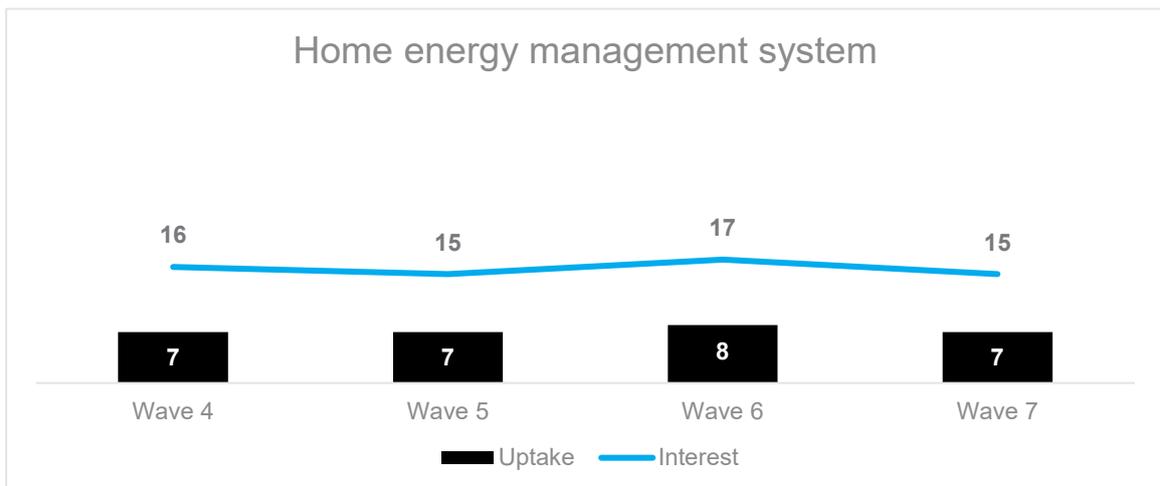
Uptake Base: All Household consumers not in Victoria

Interest Base: All Household consumers not in Victoria who do not own product



Uptake Base: All Household consumers in Victoria

Interest Base: All Household consumers in Victoria who do not own product



Uptake Base: All Household consumers

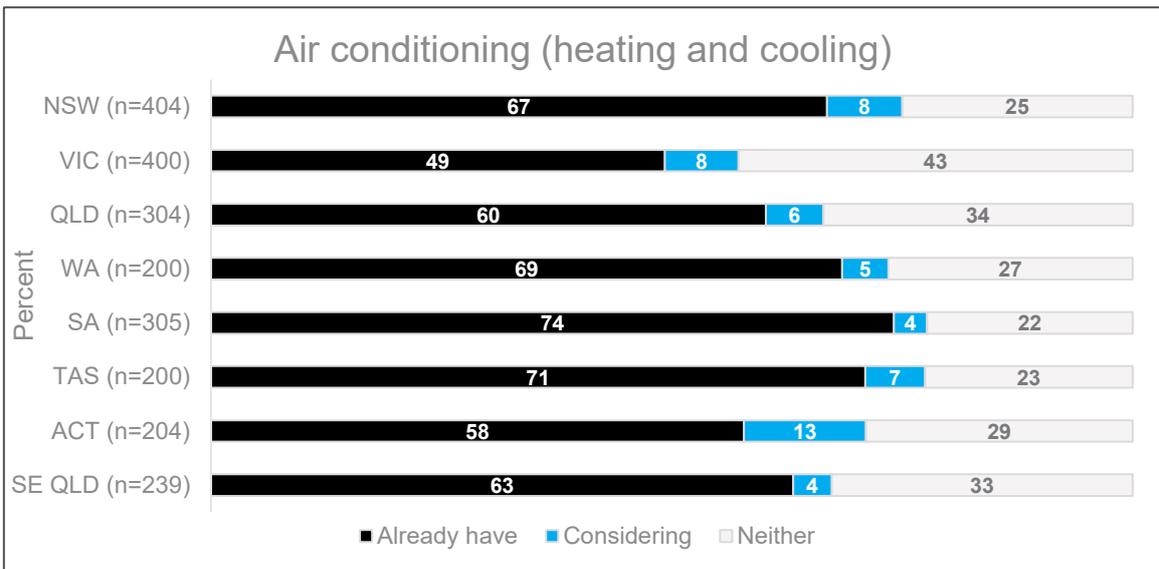
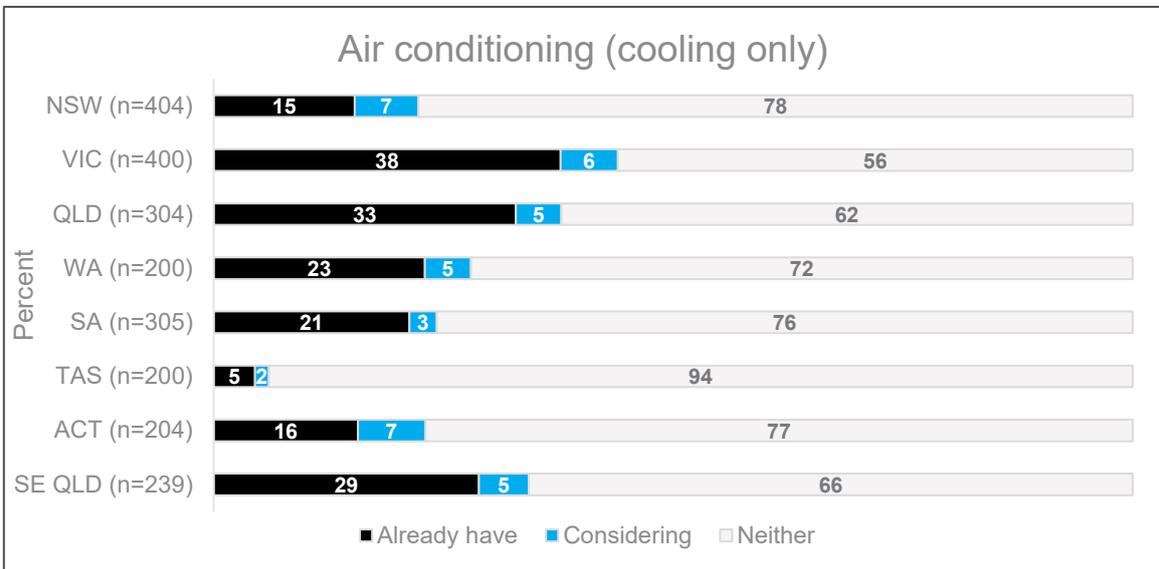
Interest Base: All Household consumers who do not own product

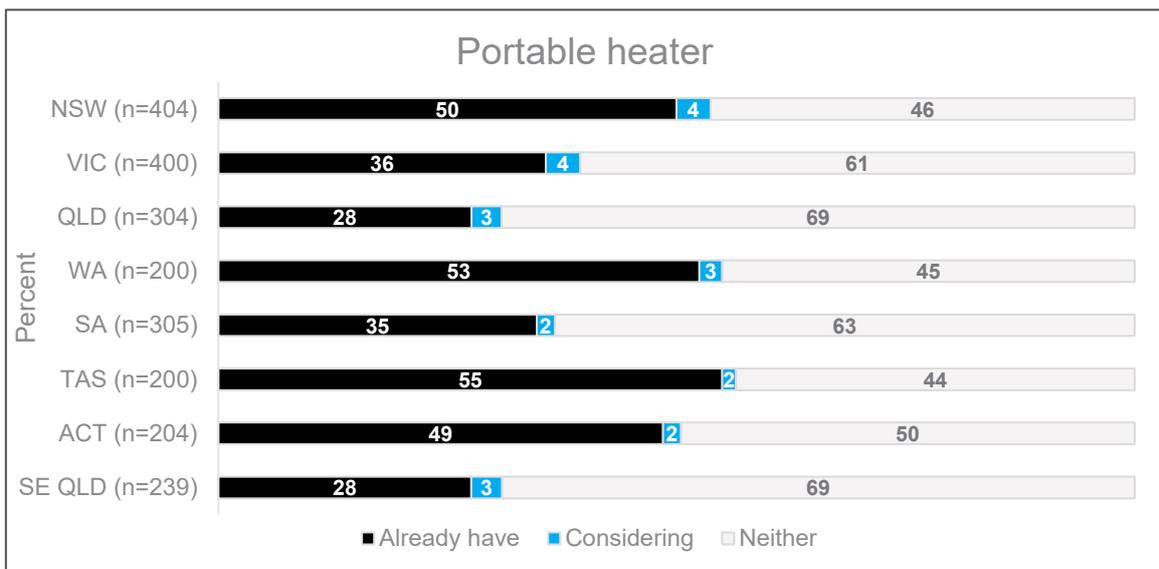
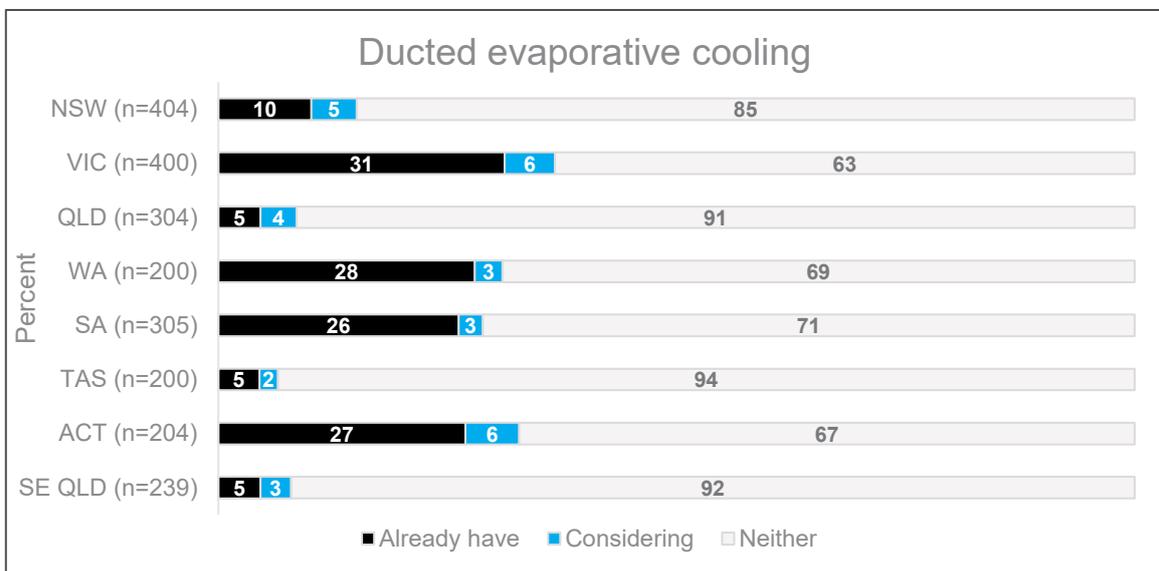
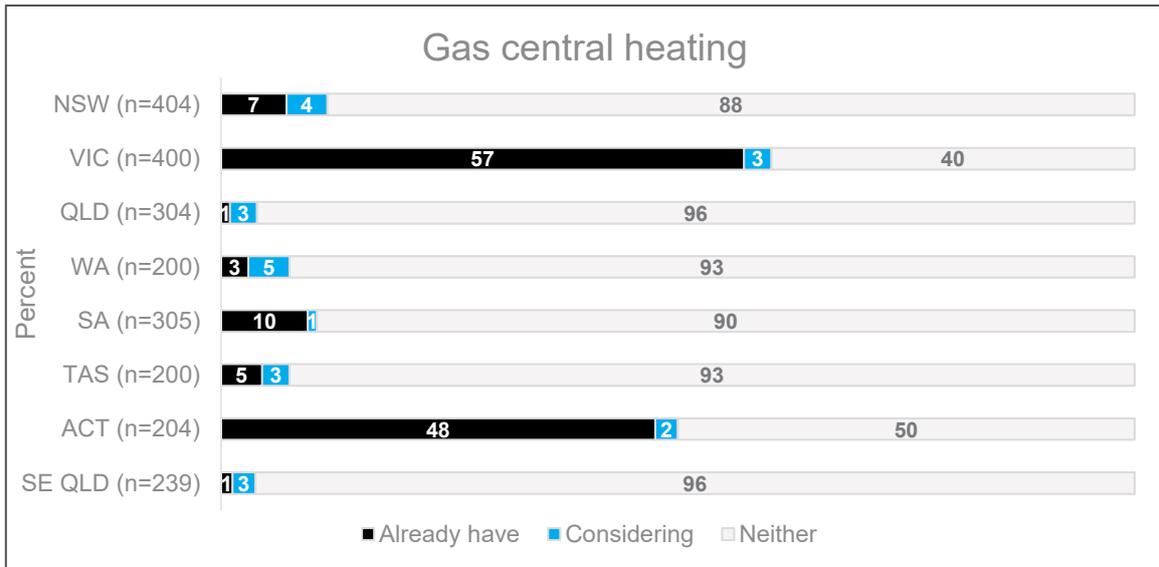
Activity

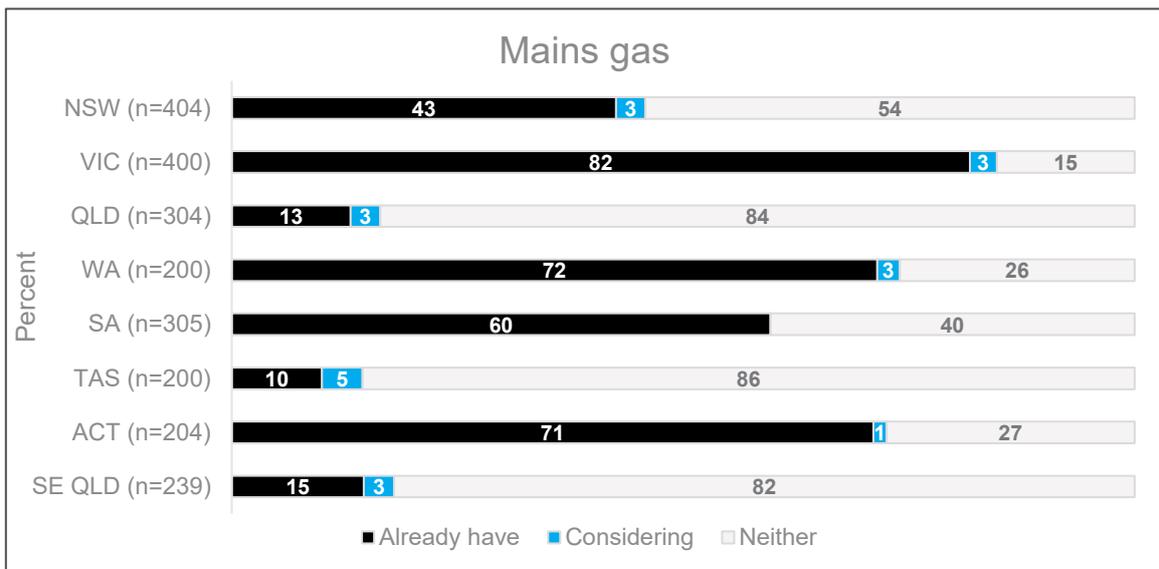
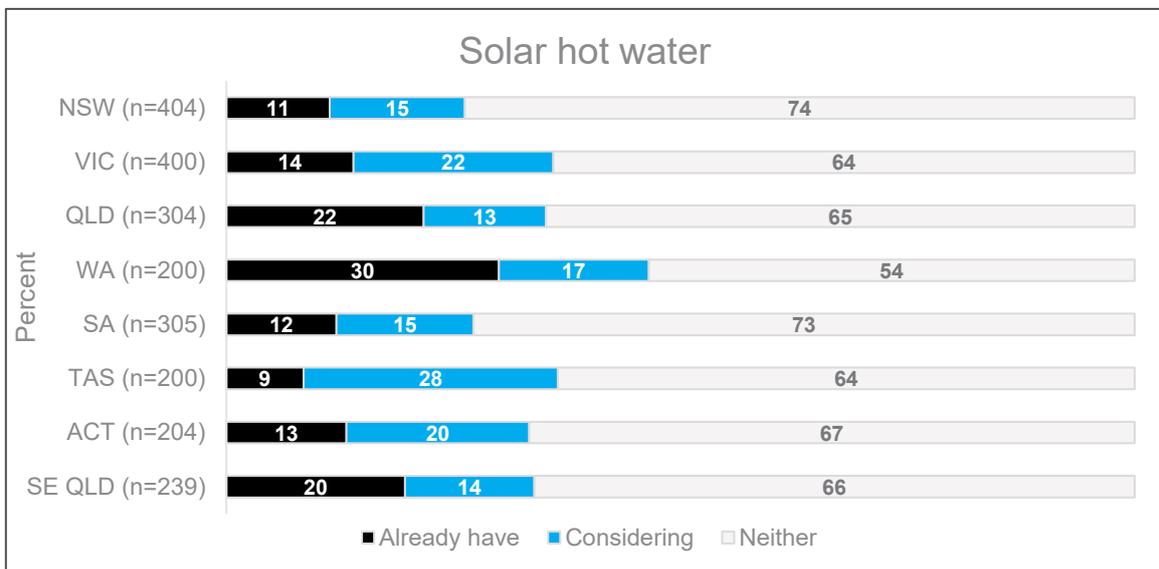
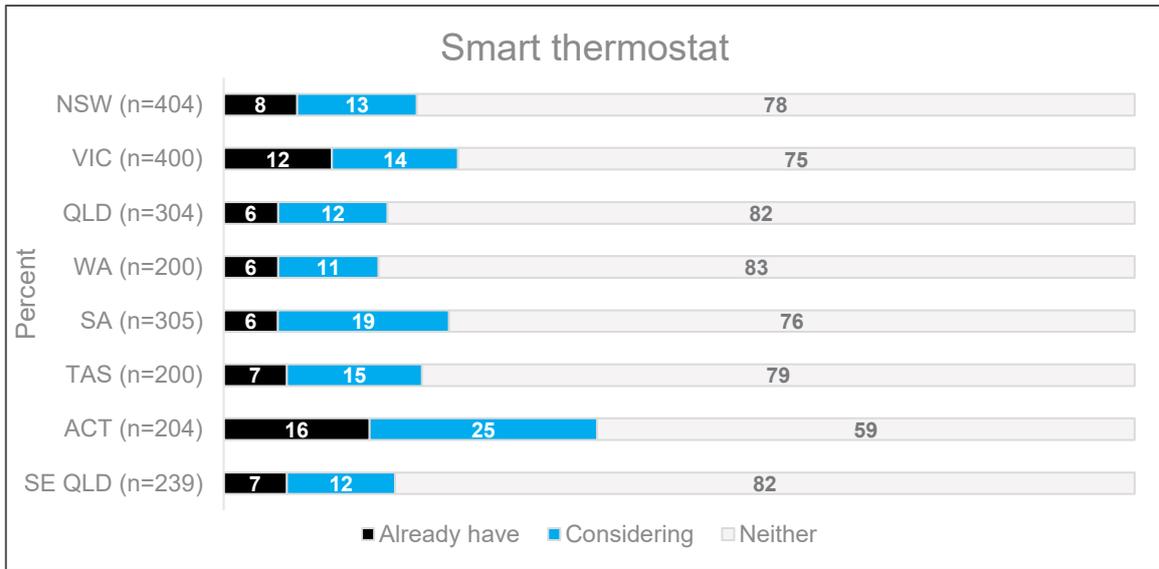
What investments are people considering

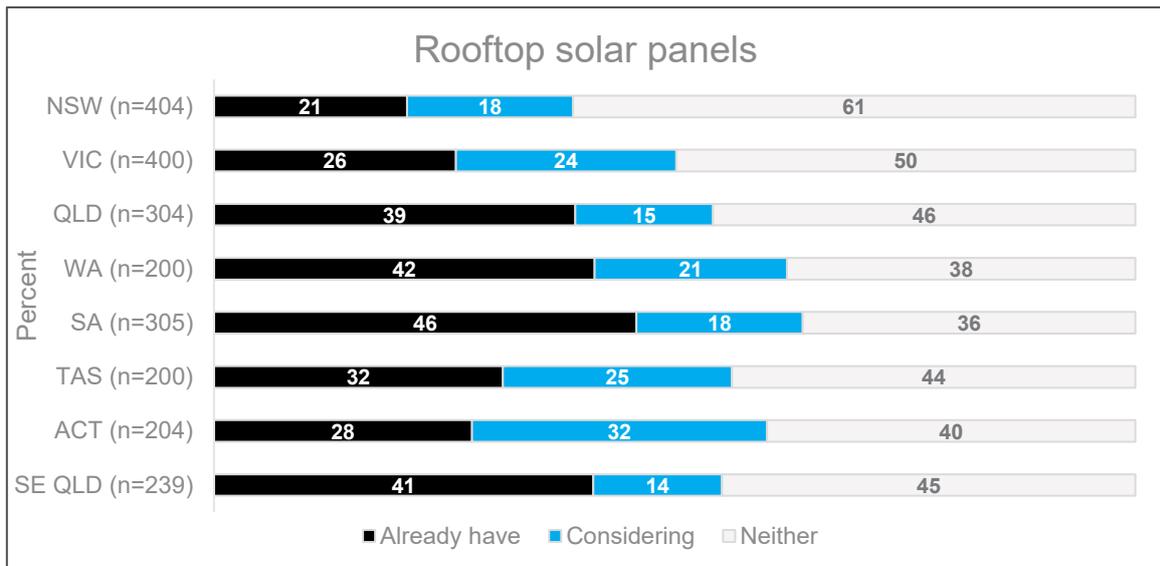
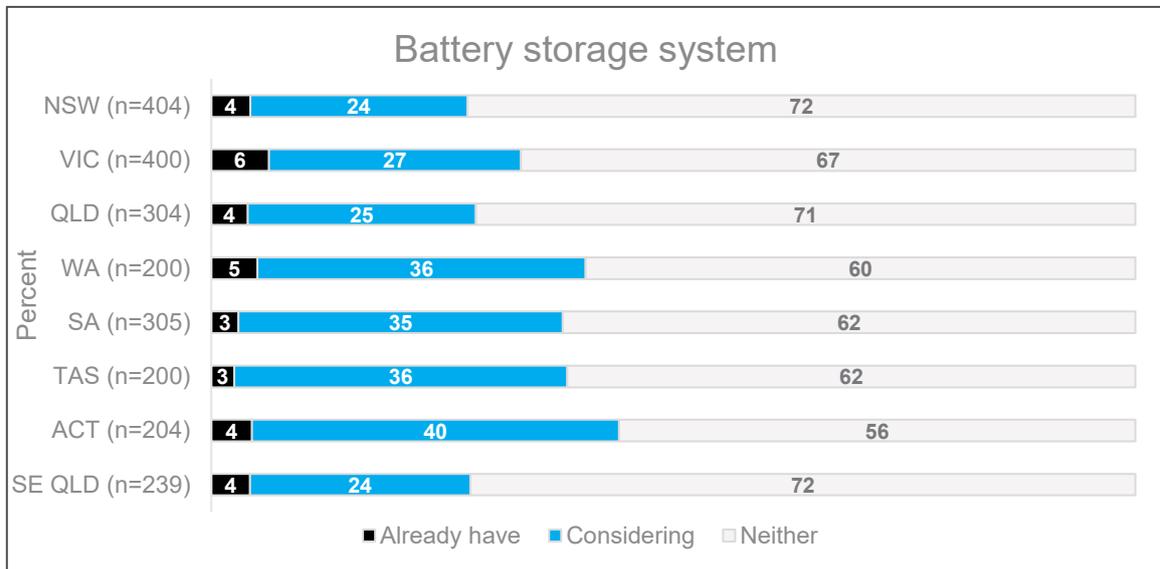
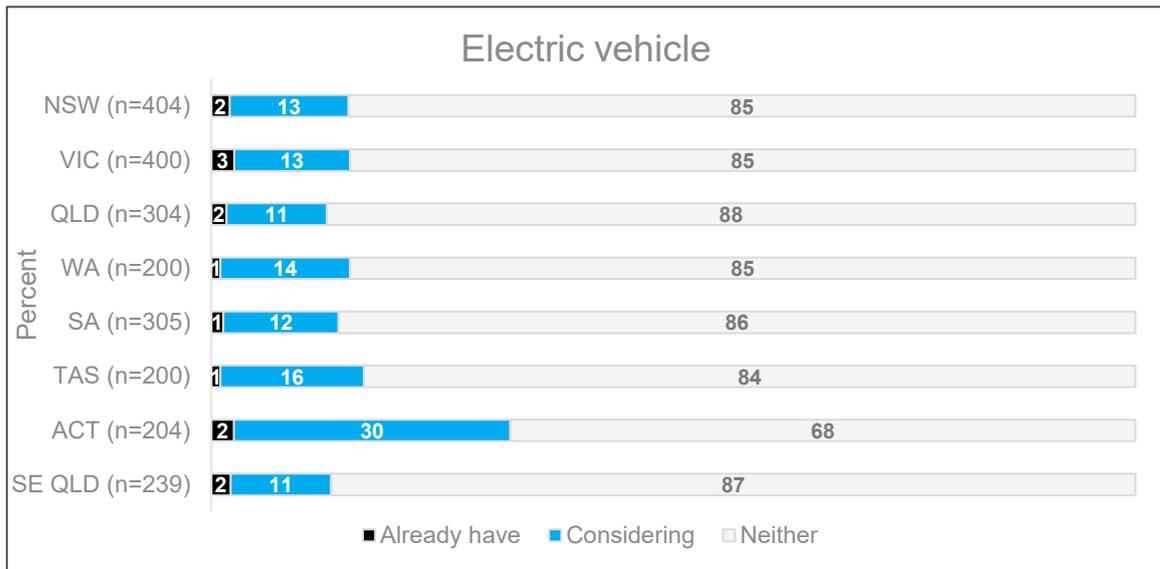
*Which of the following technology do you have at your household? And which do you use to help control your energy costs?
[If not] Which of the following are you intending to purchase for your home?*

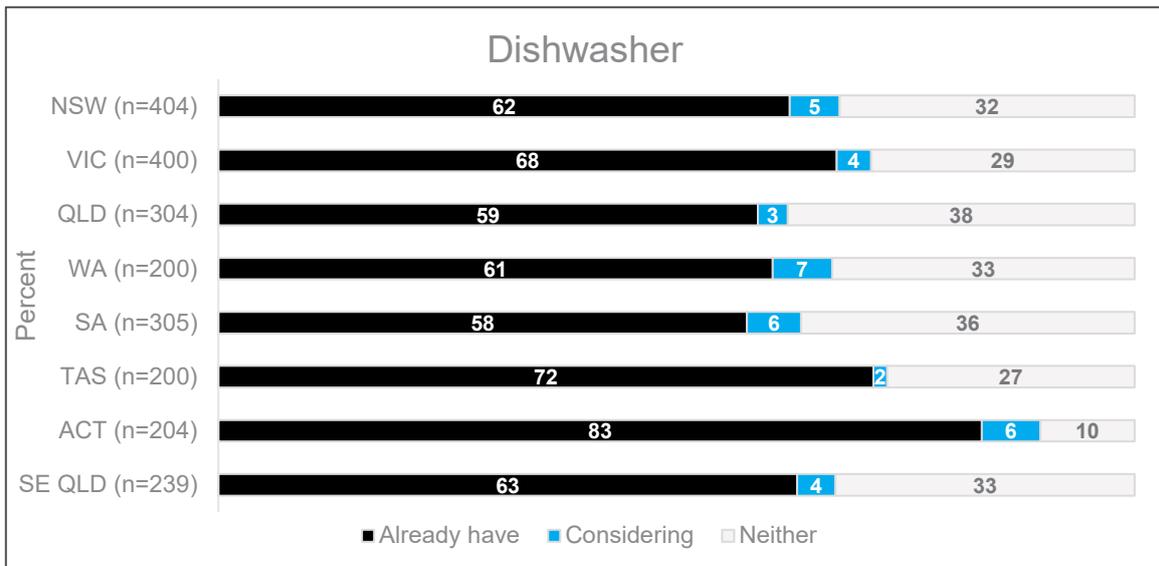
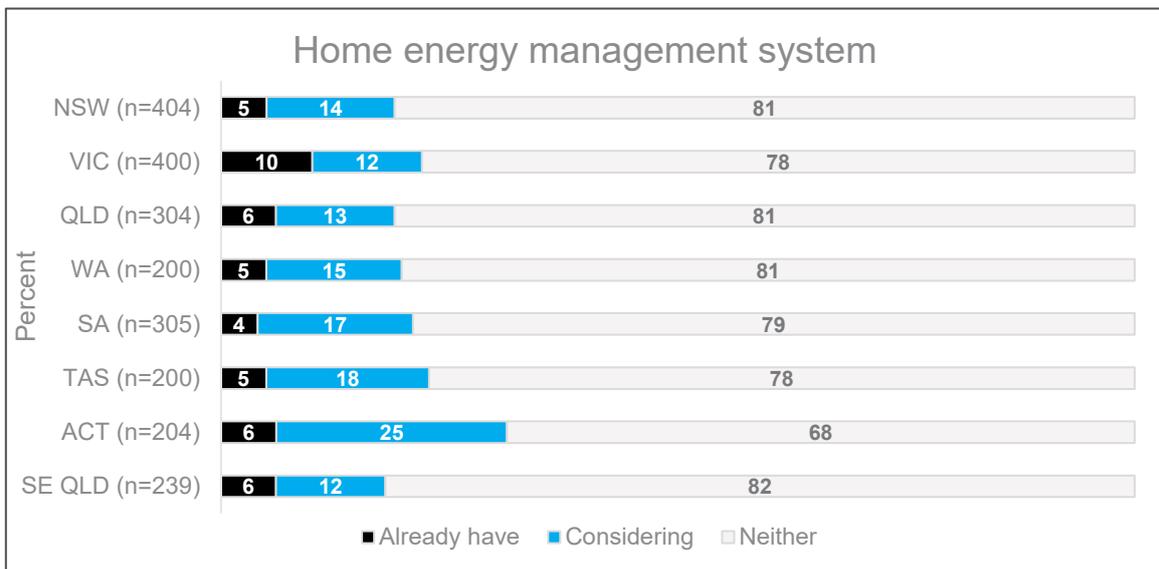
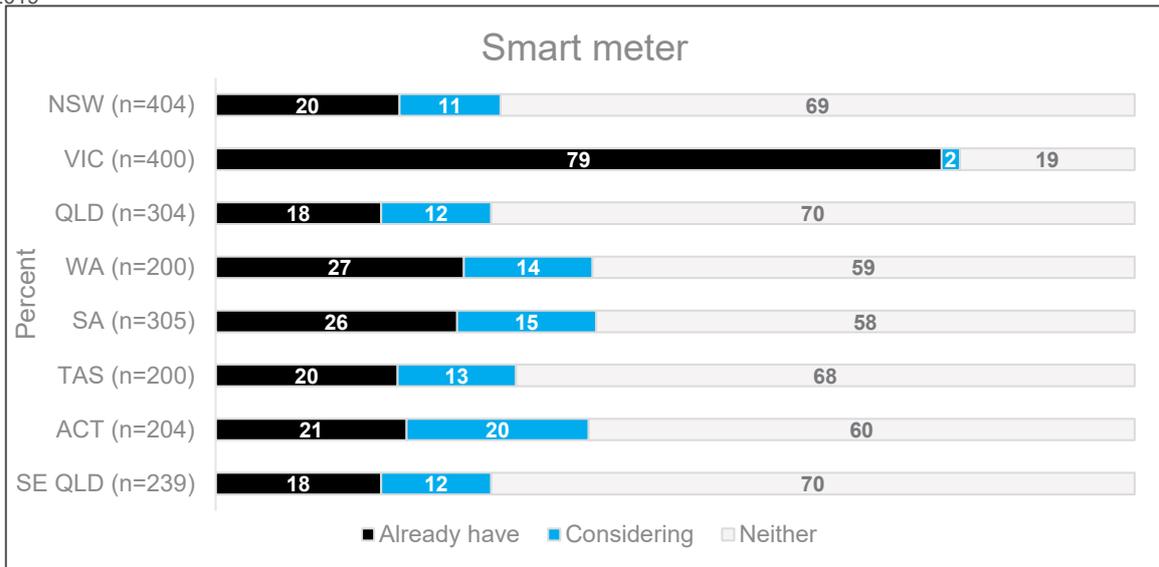
Base: Household consumers in each state

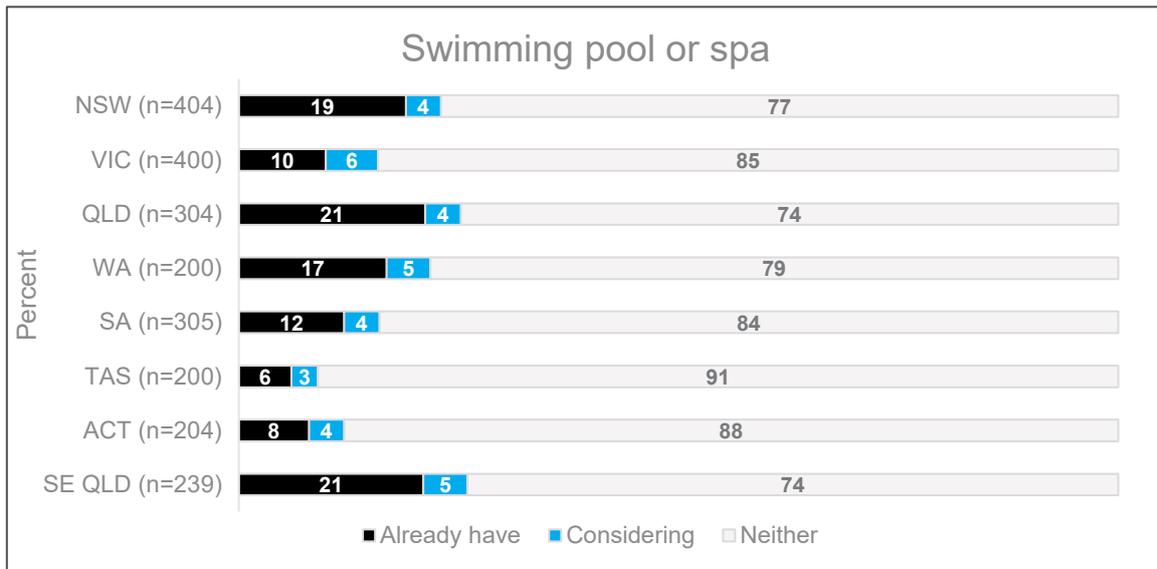












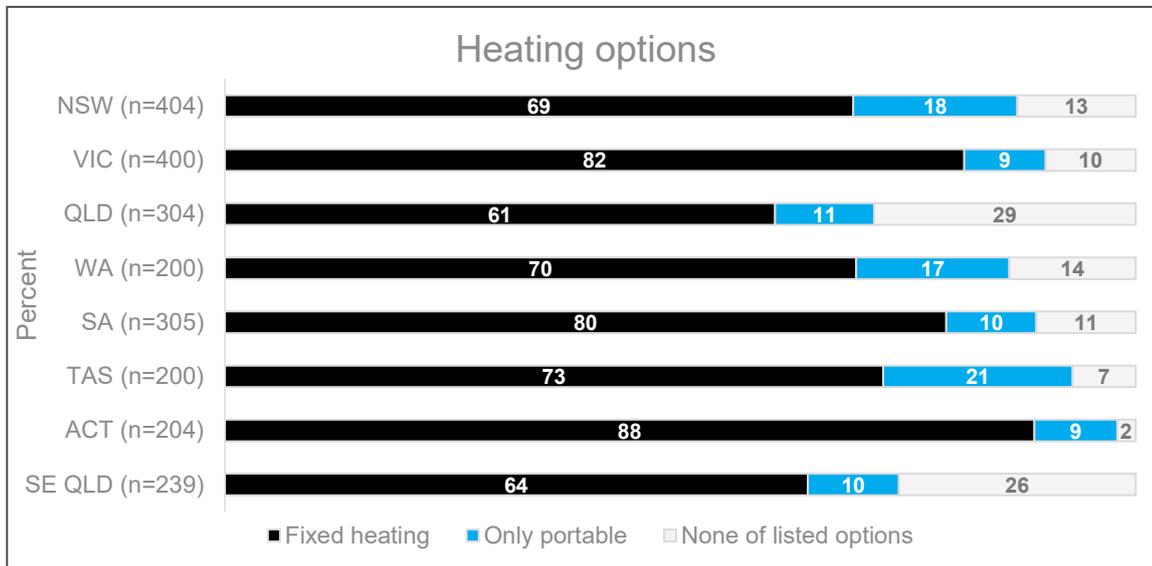
Home heating

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

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

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

- The vast majority of the household consumers in this survey report having fixed heating, with the highest proportions found in the ACT, Victoria and South Australia.
- Heating options overall are less common in Queensland (29% report no heating).
- Fixed heating is also less common in Tasmania and NSW, where consumers have the highest uptake of portable heating options.

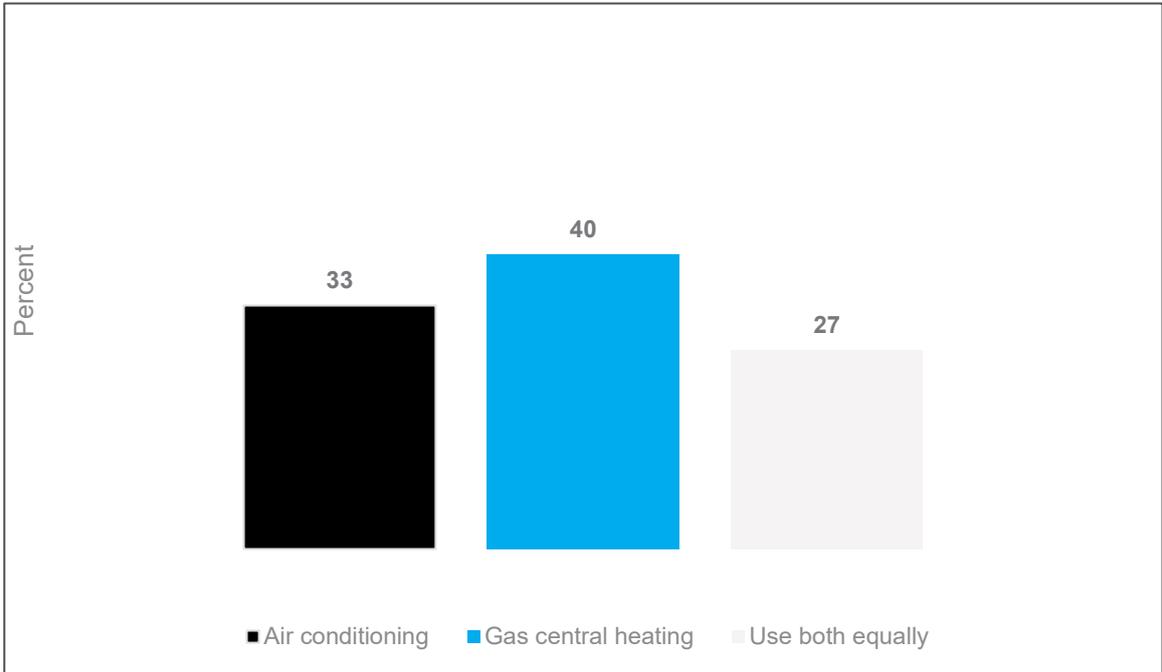


The choice between air conditioning & gas central heating

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

- 33% say that they mostly use air conditioning, while 40% use their gas more often.
- 27% report using both equally.

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



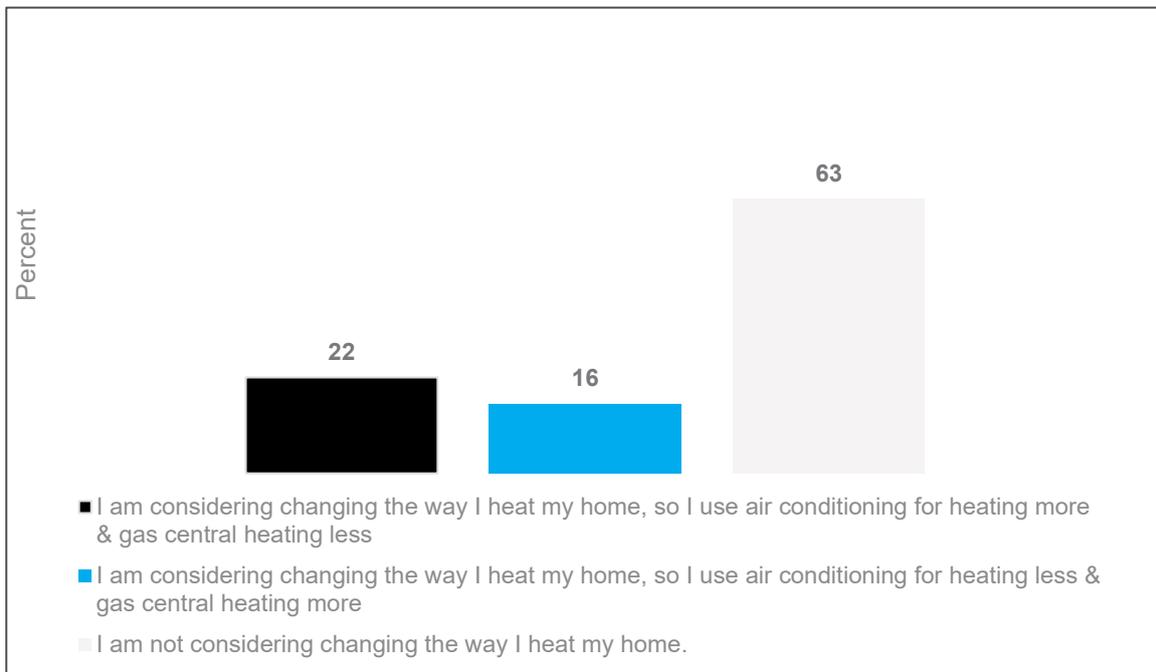
Base: Household consumers with both air conditioning (for cooling & heating) and gas central heating (n=177)

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

Most household consumers with both air conditioning (that is used for both heating and cooling) and gas central heating are not currently considering changing how they heat their home.

- 22% say they are considering using air conditioning more and gas heating less, while 16% are thinking about doing the opposite.
- 63% are not considering any change to the way they heat their home.

You mentioned earlier that you have both air conditioning (for cooling and heating) and gas central heating. Which of the following best applies to you:



Base: Household consumers with both air conditioning (for cooling & heating) and gas central heating (n=177)

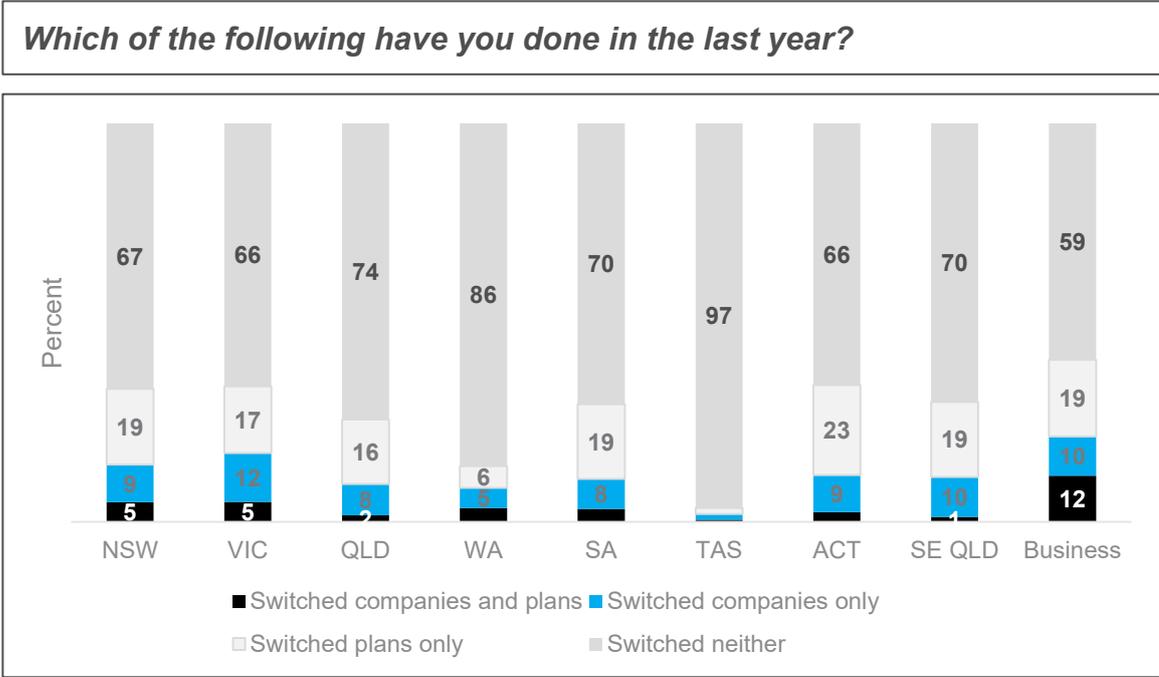
*Breakdowns for individual states or for business consumers too small to be reported

Activity

Recent switching

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

- There were similar proportions of switching activity among the states with retail competition - Victoria (34%), New South Wales (33%), South East Queensland (30%), and South Australia (30%).
- Small business consumers were more likely to have switched companies or plans in the past year (41%).



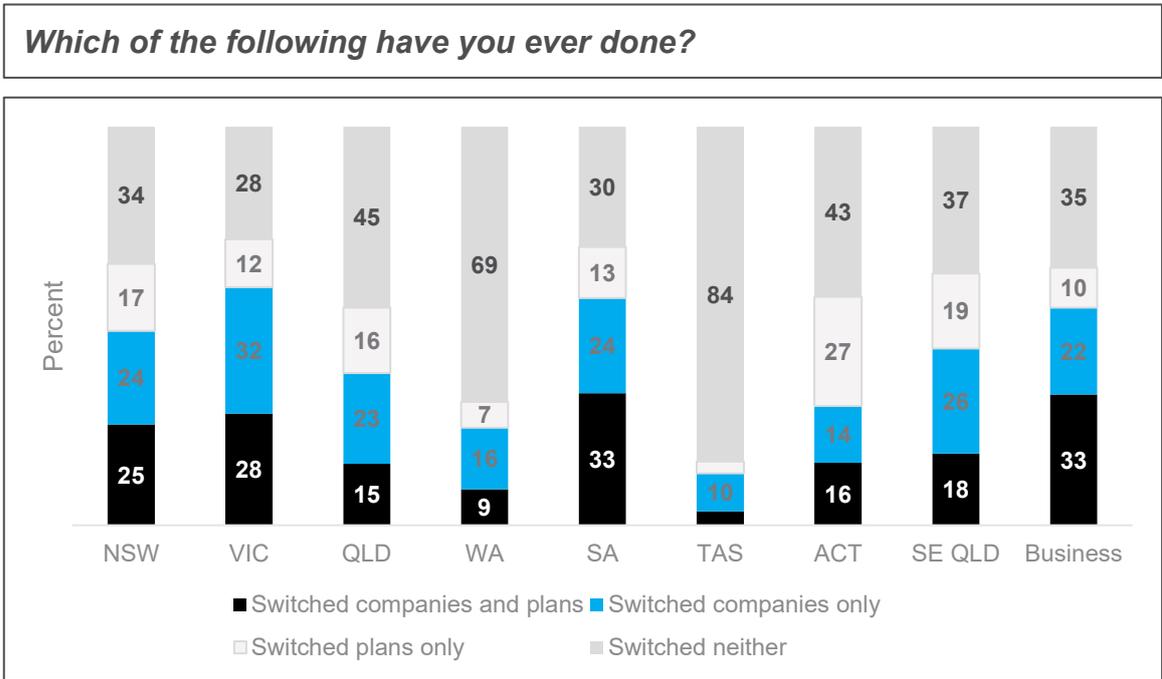
Note: For readability, percentages have been omitted where they are less than 5%

Activity

Switching history

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

- Even in deregulated markets, around 3-4 in every ten consumers report never having switched companies or plans.



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

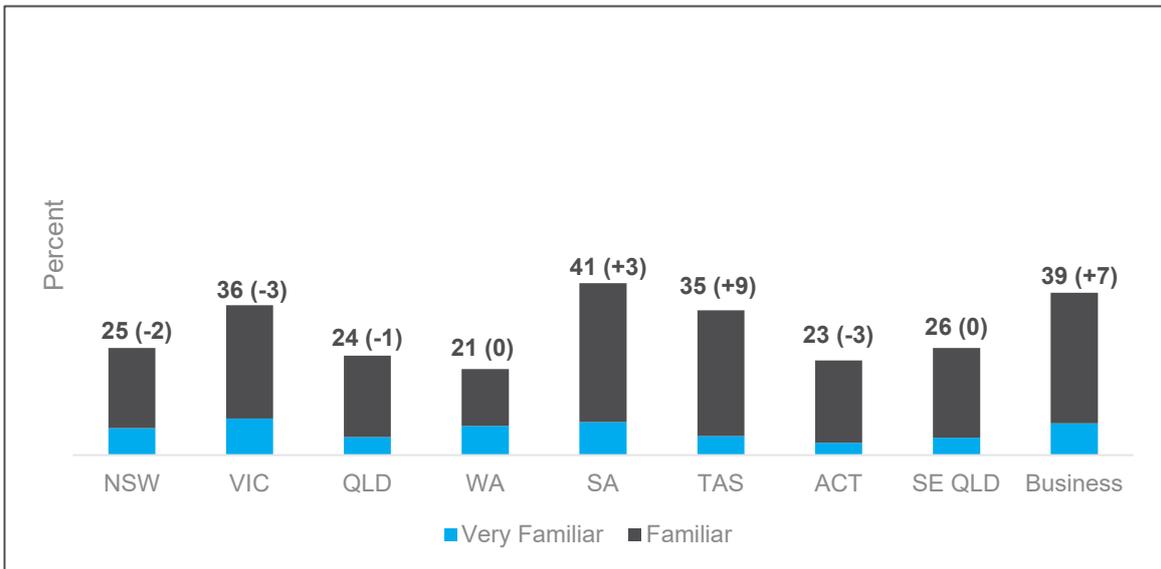
Other

Awareness of the Energy Ombudsman

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

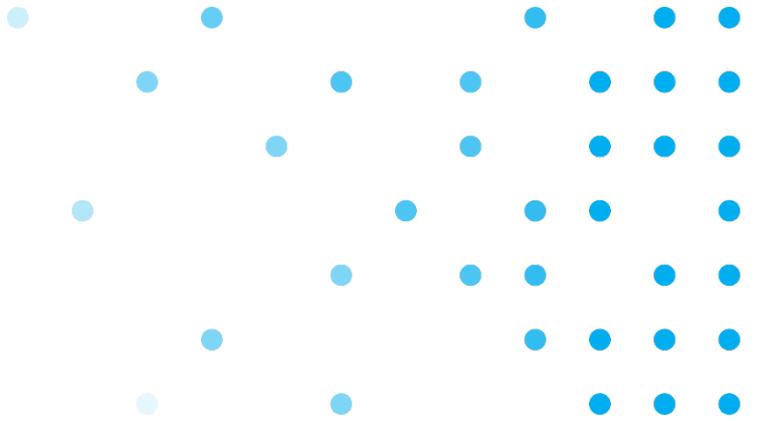
- 39% of small business consumers claim to be familiar with the Ombudsman.
- 41% of South Australians, 36% of Victorians and 35% of Tasmanians claim familiarity with the Energy Ombudsman.

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



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

Small business



Satisfaction

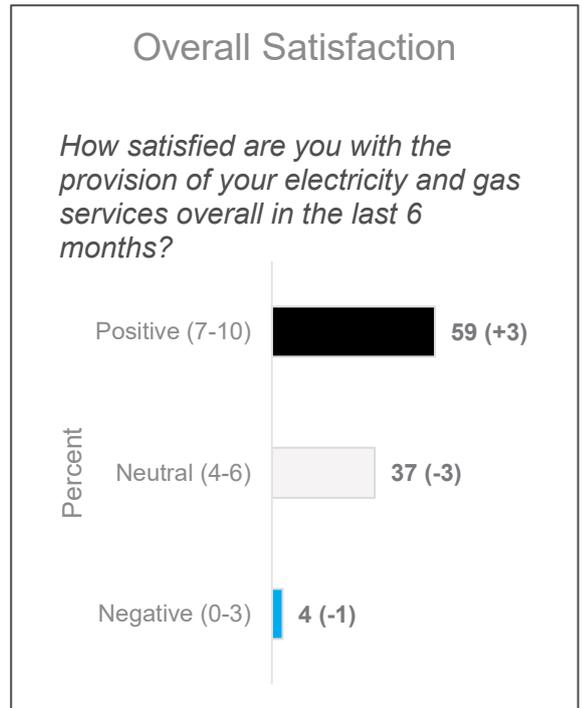
Overall satisfaction

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

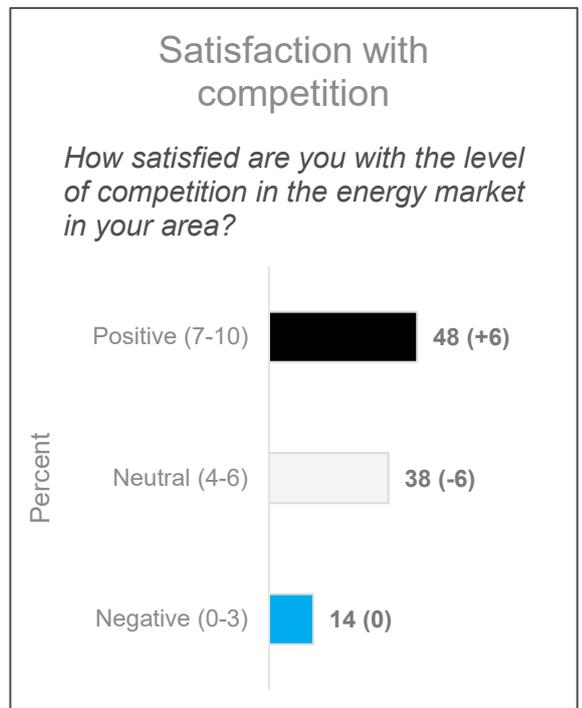
- 59% now say they are satisfied, up 3% since the June 2018 survey.

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

- 48% now report being satisfied, up 6%.



Base: Small businesses (n=285)



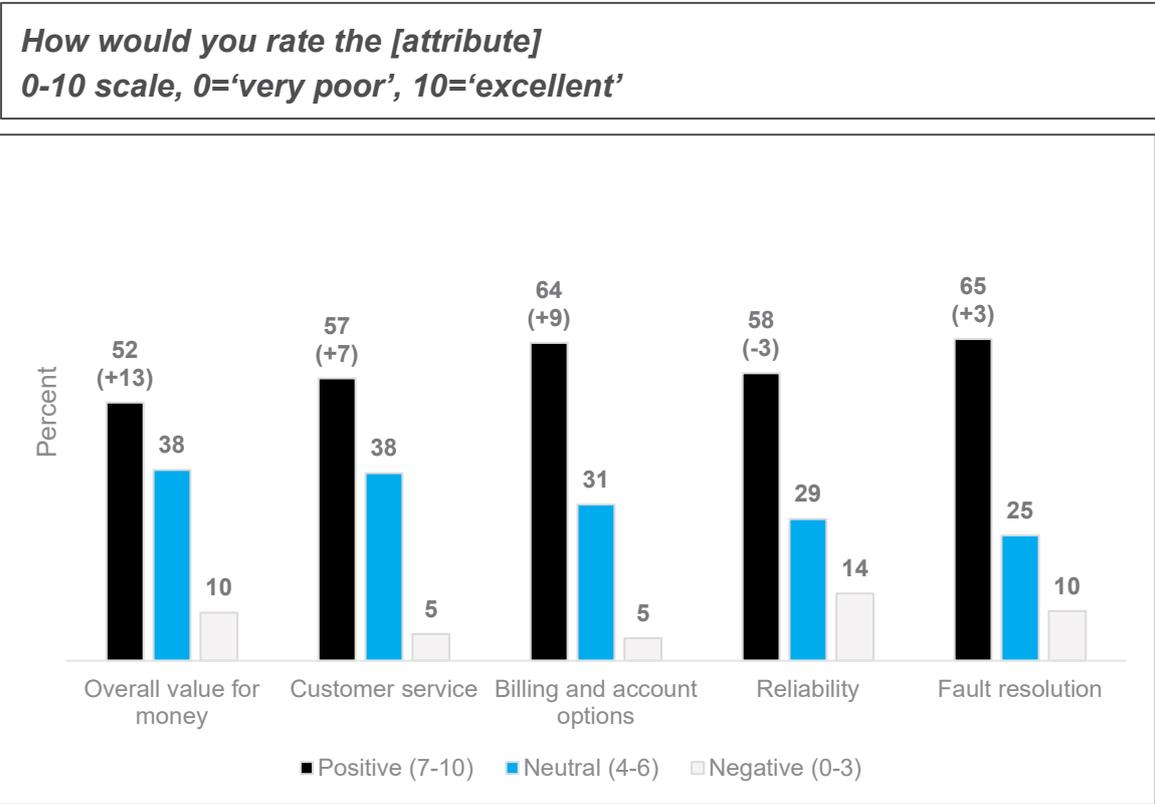
Base: Small businesses (n=285)

Satisfaction

Satisfaction with electricity

Ratings from small business consumers have increased since June 2018 for each measure.

- Satisfaction with value for money for electricity services is up 13% which means that more than half (52%) of all respondents gave a positive ranking on this measure.
- The only measure where satisfaction was lower compared with a year ago was for reliability, down 3% (to 58%).



Base: Small businesses with electricity supply (n=285)
Base for fault resolution: Small businesses who had a power outage (n=229)

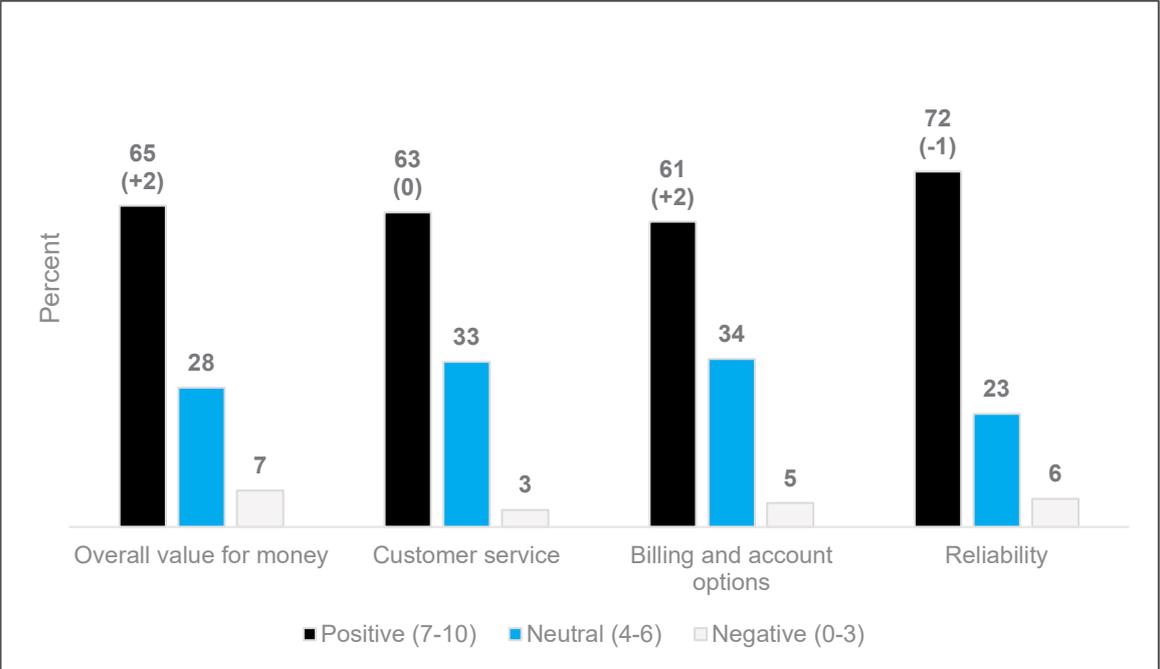
Satisfaction

Satisfaction with gas

Small business consumers' ratings for gas are steady or slightly up.

- 65% are satisfied with their overall value for money, up 2% from last year's survey
- 63% are satisfied with their customer service, with no change.
- 61% are satisfied with their billing and account options, up 2%.
- 72% are satisfied with the reliability of their gas supply, down 1%.

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



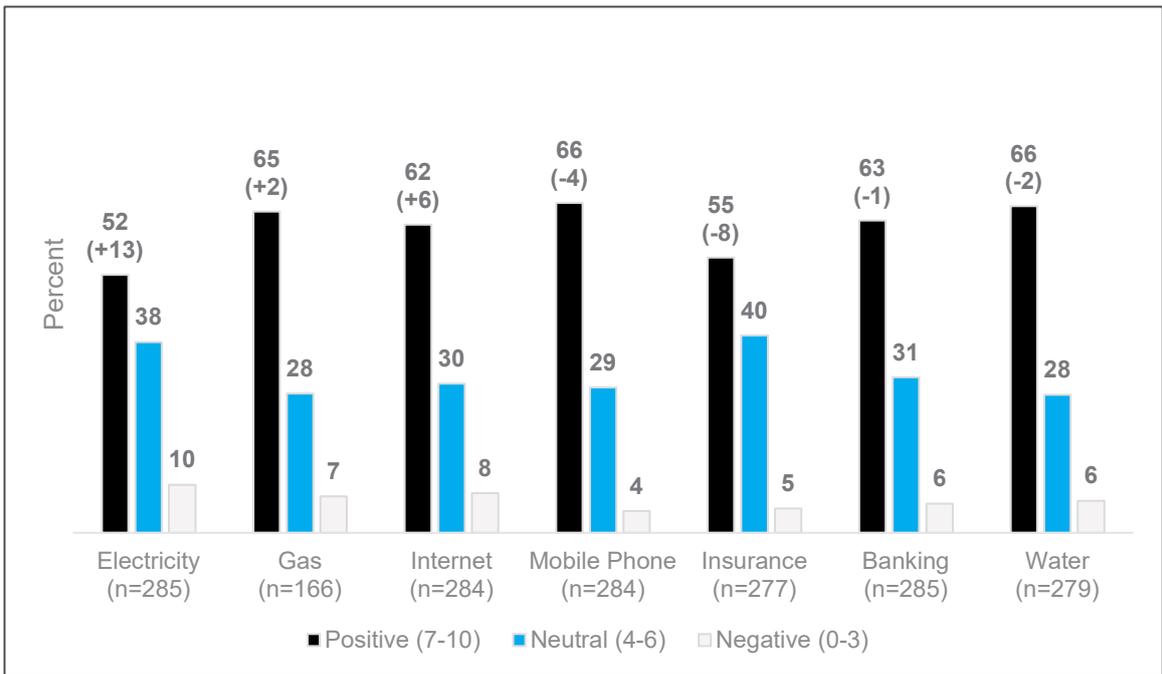
Base: Small businesses with gas supply (n=166)

Satisfaction with utilities and services

Small business consumers' satisfaction with the value for money for electricity services is catching up to the satisfaction levels with other utilities and services.

- 52% are now satisfied with the value for money of their electricity service, a sharp increase of 13% from June 2018.
- With a satisfaction level of 65% (up 2%), gas is among the utilities and services with the highest level of satisfaction, trailing water (66% satisfied) and mobile phone services (66%).

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



Base: Small businesses with each service

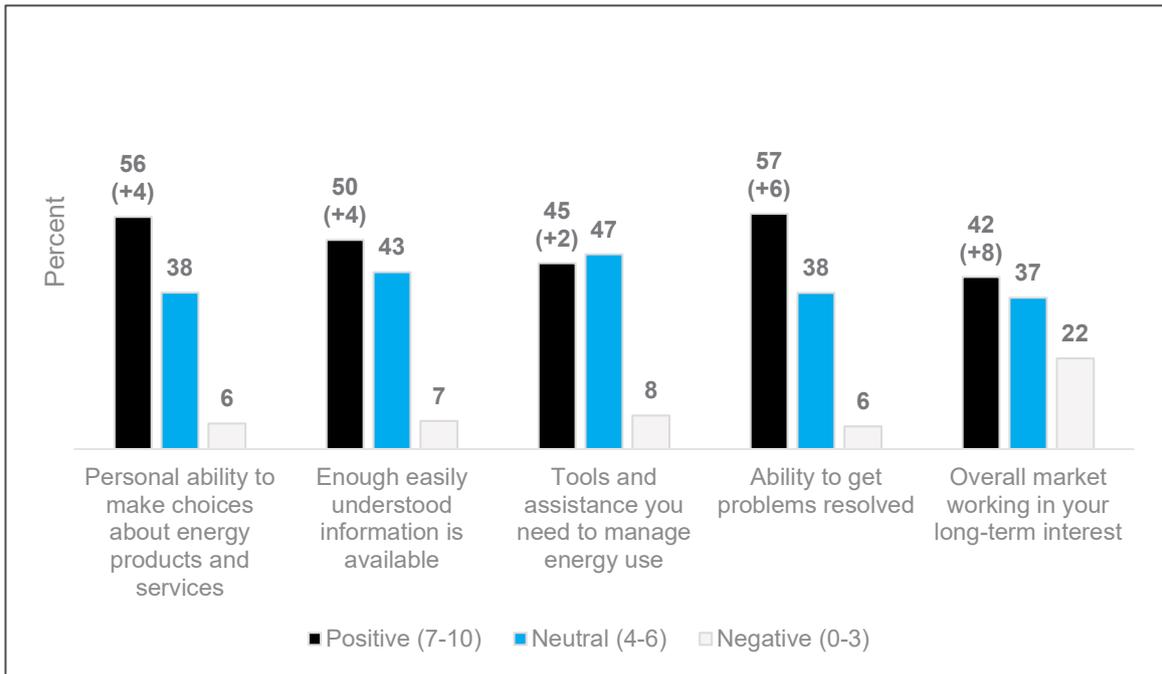
Confidence

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 42%).
- Small business consumers' confidence in their personal ability to get problems resolved increased 6% to 57% and this is the measure with the highest level of confidence
- Small business consumers' confidence to make choices about energy products and services also increased 4% to 56%.

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



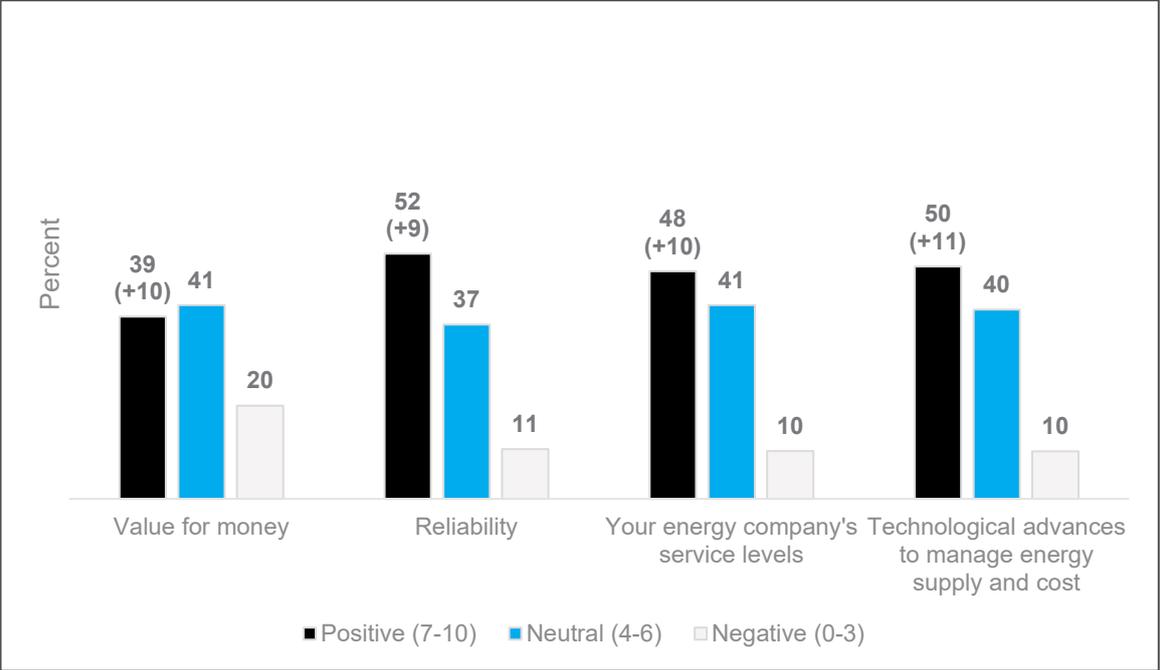
Base: Small businesses (n=285)

Confidence in long-term outcomes

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

- The proportion confident that the market will deliver better value for money in the long term is up 10% since June 2018 to 39%.
- There is also a double digit increase in the proportion confident that their energy company's service levels will improve (up 10% to 48%) and that technological advances to manage energy supply and cost will improve (up 11% to 50%).
- There was also greater confidence that energy reliability will be better in the future (up 9% to 52%).

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



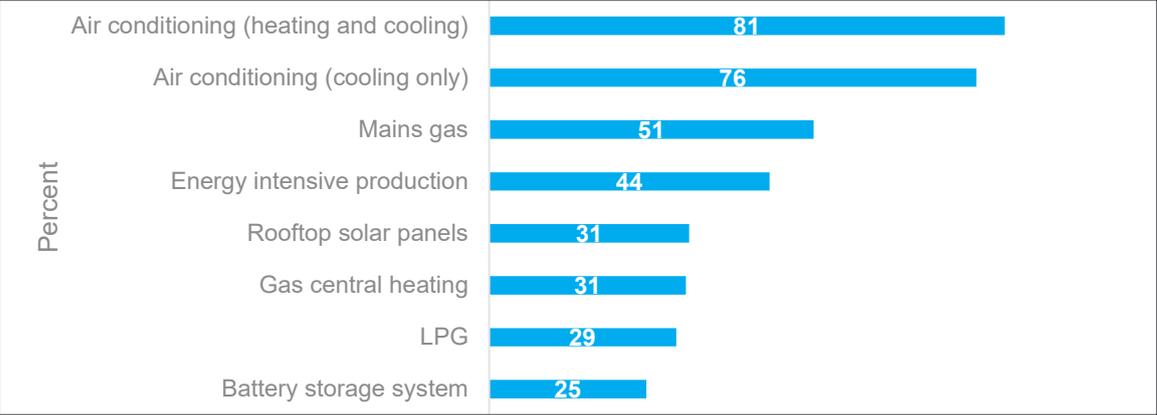
Base: Small businesses (n=285)

Uptake of technologies

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

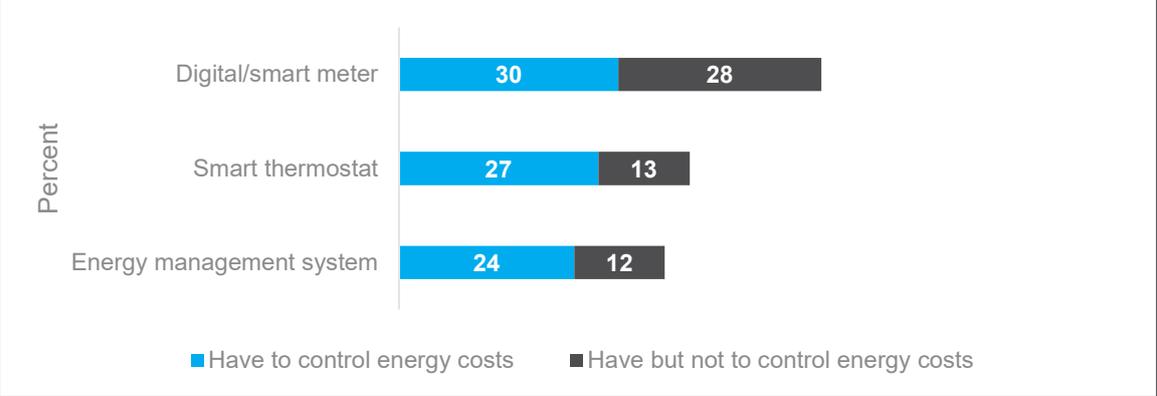
- 58% of small business consumers say they have a digital/smart meter, and 30% say they use one to control energy costs.
- 40% say they have a smart thermostat, with 27% using it to control energy costs.
- 36% say they have an energy management system, and 24% use it to control energy costs.
- 31% say they have rooftop solar while 25% say they have a battery storage system.

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



Base: Small business consumers whose primary place of business is not their home (n=159)

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



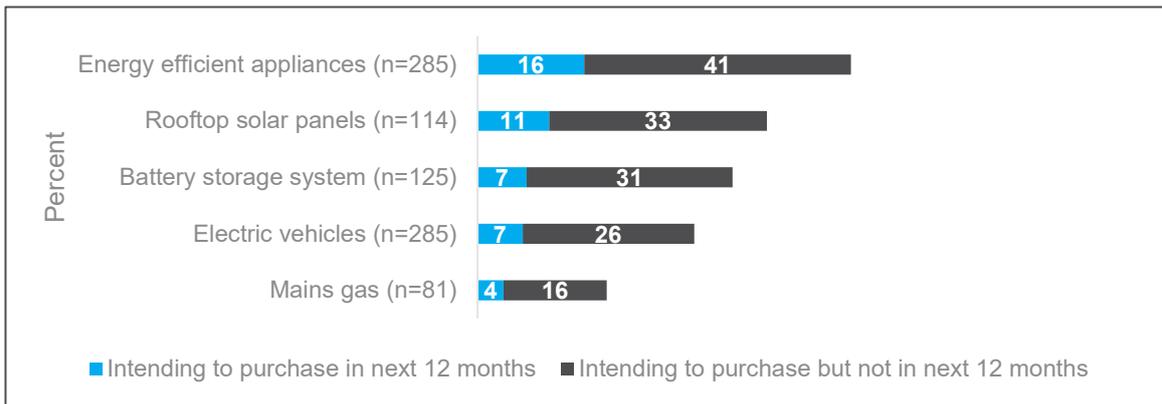
Base: Small business consumers whose primary place of business is not their home (n=159)

Future uptake of technologies

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

- 57% say they are intending to purchase energy efficient appliances for their business, with 16% saying they plan to do so in the next 12 months.
- 44% of small businesses who do not currently have solar panels say they are planning to purchase them, and 11% intend to do so in the next 12 months.
- 38% of small businesses who do not currently have battery storage say they intend to purchase a system, and 7% intend to do to so in the next 12 months.

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



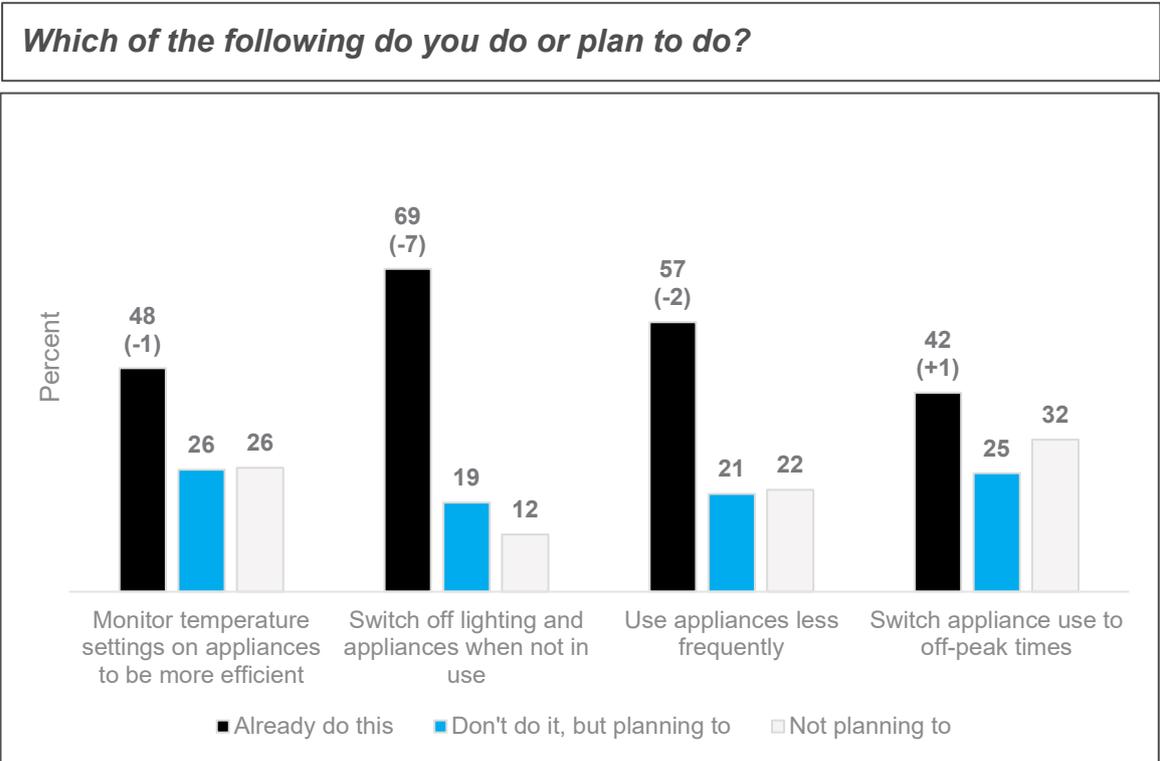
Base: Small business consumers whose primary place of business is not their home

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.

Reducing energy use

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

- 69% switch off lighting and appliances when not in use.
- 57% are using appliances less frequently.
- 48% are monitoring temperature settings on appliances.
- 42% say they are switching appliance use to off-peak times.



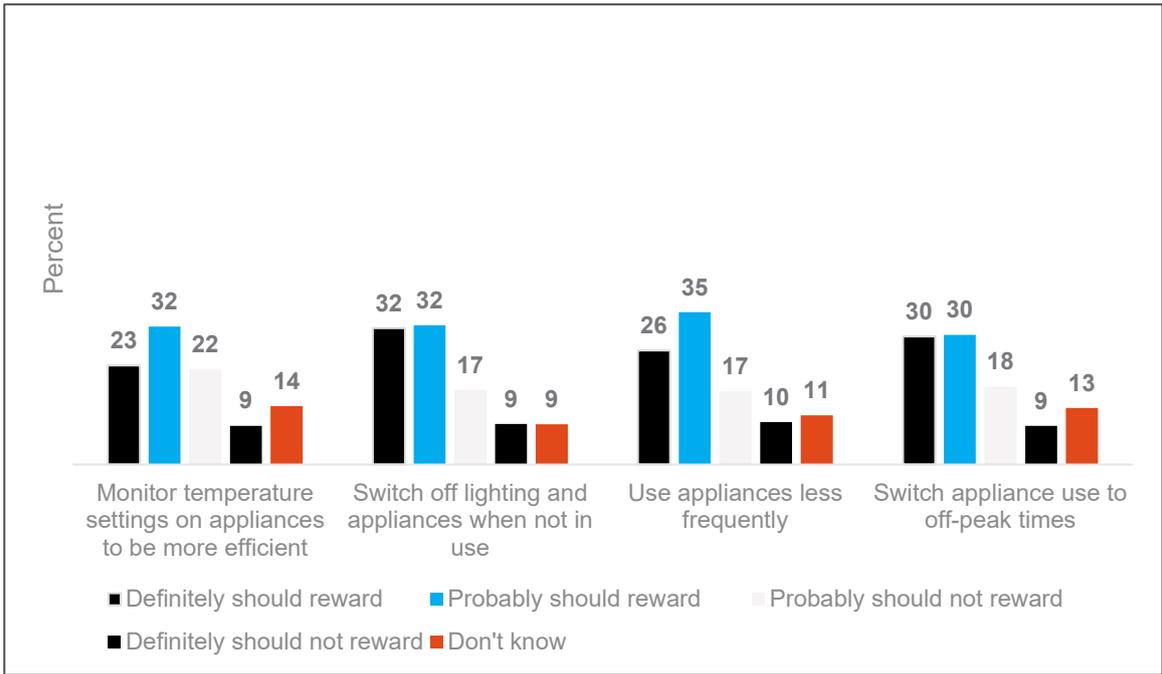
Base: Small businesses (n=285)

Reward for reducing energy use

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

- 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.
- 60% think customers should be rewarded for switching appliance use to off-peak times.
- 55% 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:



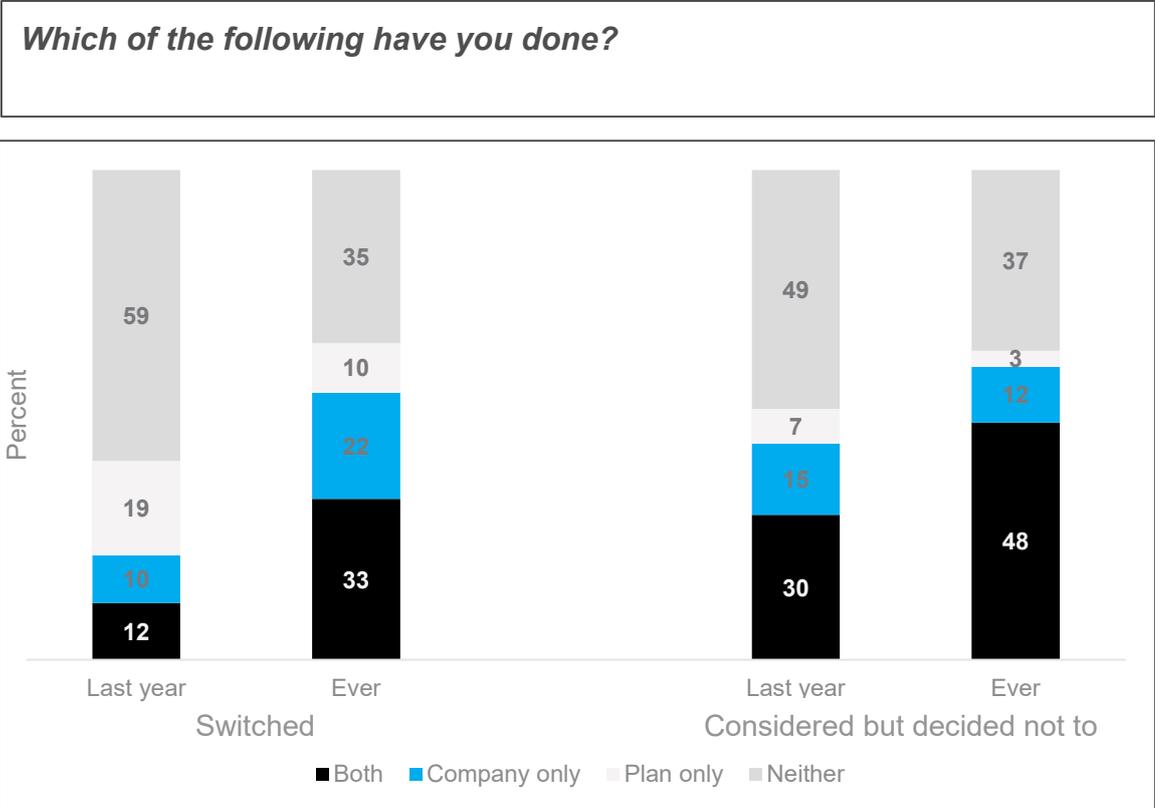
Base: Small businesses (n=285)

Activity

Switching behaviour

Almost half (45%) of all small business consumers have never switched their energy company and one in three (35%) has never switched either their company, or their plan.

- 63% say they have previously considered switching energy companies or plans but decided not to (51% in the past year).
- 65% have switched energy companies or plans in the past and that includes 41% who did so in the past year,



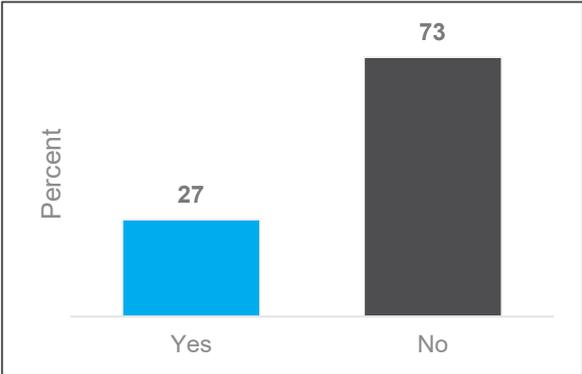
Base: Small businesses (n=285)

Reasons for considering switching

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

- 36% said that they looked for a better price on a price comparison website the last time they looked at switching energy companies.
- 27% plan to switch energy companies in the next year.

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



Base: All small business consumers (n=285)

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



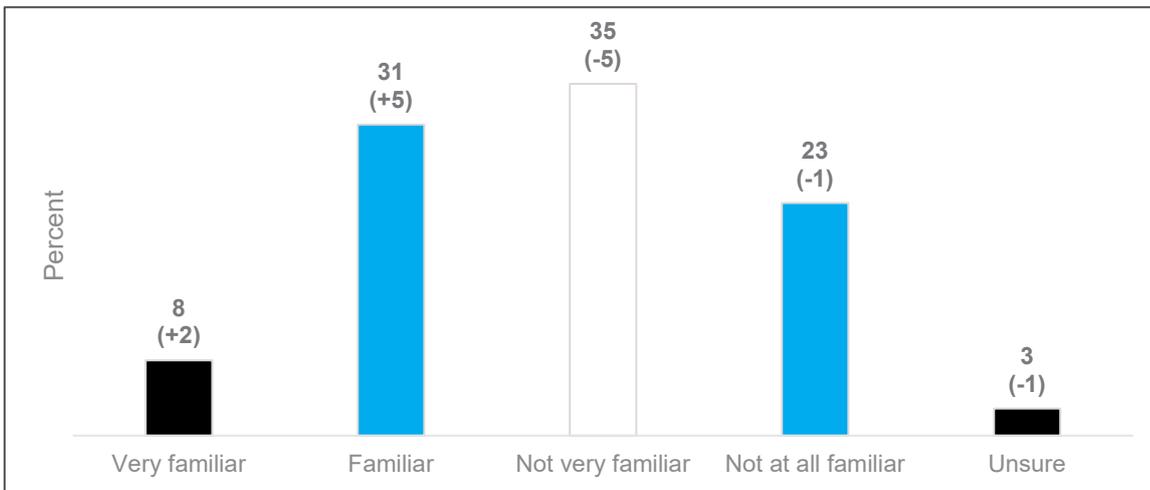
Other

Awareness of the Energy Ombudsman

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

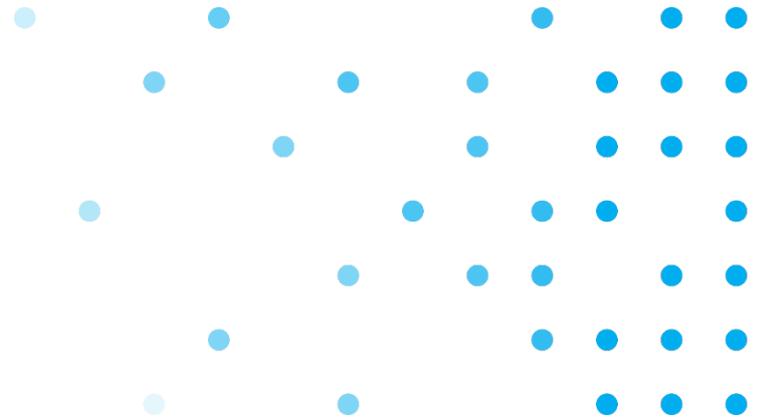
- 39% of small business consumers claim to be familiar with the Ombudsman, up 7%.

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



Base: Small businesses (n=285)

New South Wales





Overall satisfaction

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

- 64% are satisfied, down 7% from June 2018.

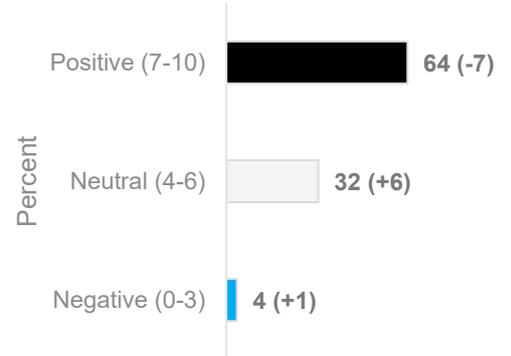
Conversely, satisfaction with the level of competition has gone up.

- 48% say they are satisfied with the level of competition, up 3% since June 2018.

Satisfaction

Overall Satisfaction

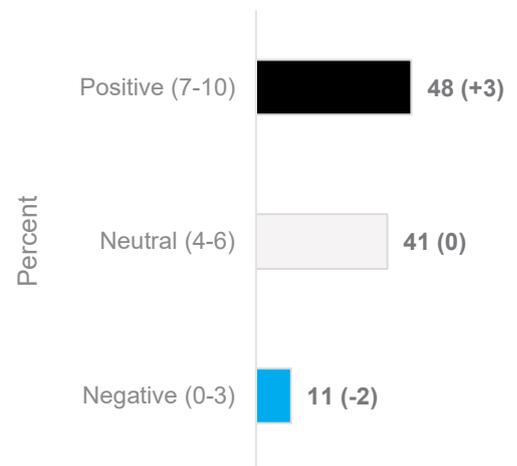
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Base: Consumers in NSW (n=404)

Satisfaction with competition

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



Base: Consumers in NSW (n=404)



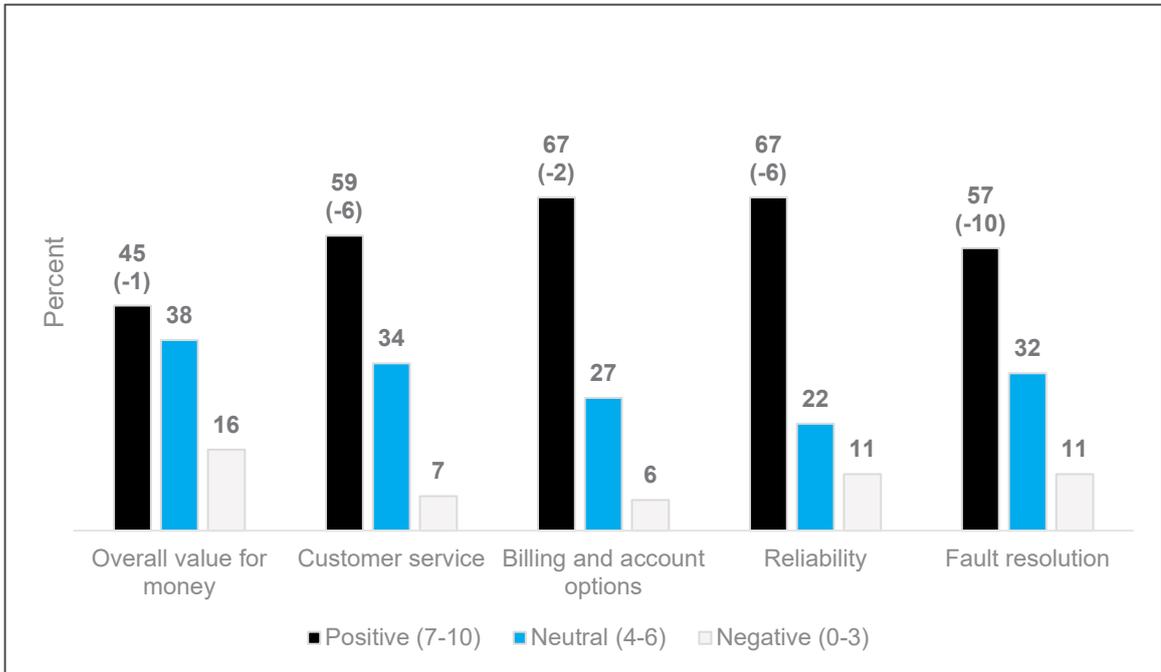
Satisfaction

Satisfaction with electricity

Satisfaction has decreased across most measures in NSW.

- The largest decreases in satisfaction were for fault resolution after power outages and blackouts (down 10% to 57%) and reliability (down 6% to 67%).
- The value for money rating of NSW’s electricity supply is down marginally to 45%.

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



Base: Consumers in NSW with electricity supply (n=404)
Base for fault resolution: Those in NSW who had a power outage or rated 0 to 9 satisfaction with outage (n=246)



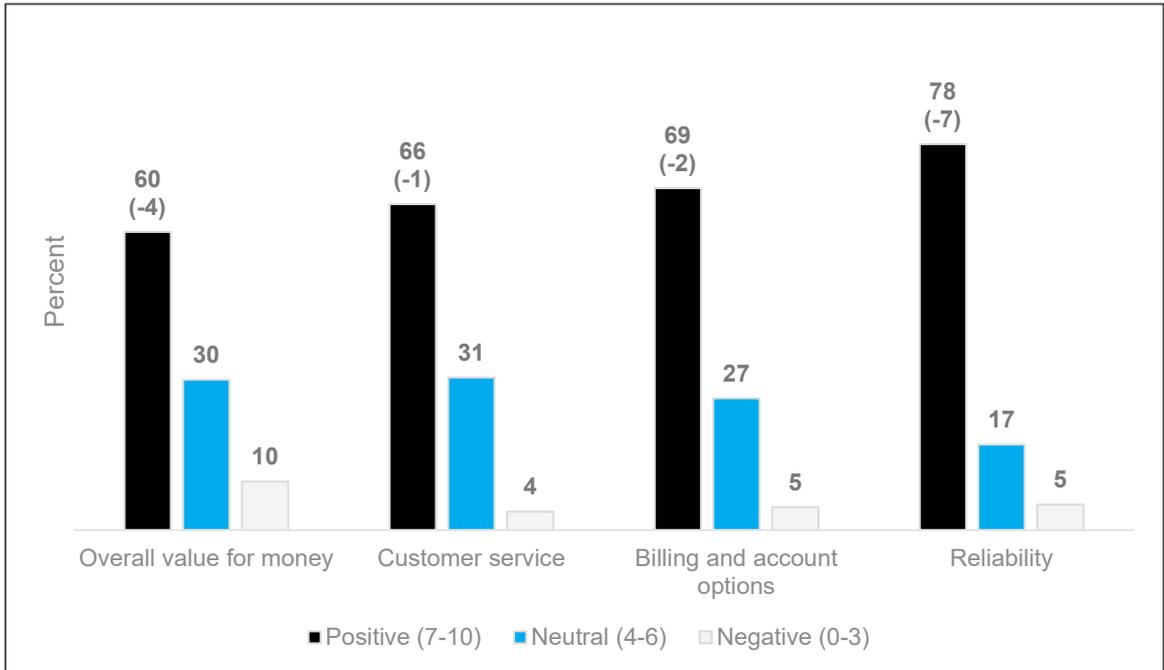
Satisfaction

Satisfaction with gas

Satisfaction with gas has decreased at least slightly for all measures for NSW household consumers since last year's survey.

- 60% are satisfied with the value for money they get for gas (down 4%).
- 66% are satisfied with their gas company's customer service (down 1%).
- 69% are satisfied with their billing and account options (down 2%).
- 78% are satisfied with reliability of their service (down 7%).

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



Base: Consumers in NSW with gas supply (n=215)

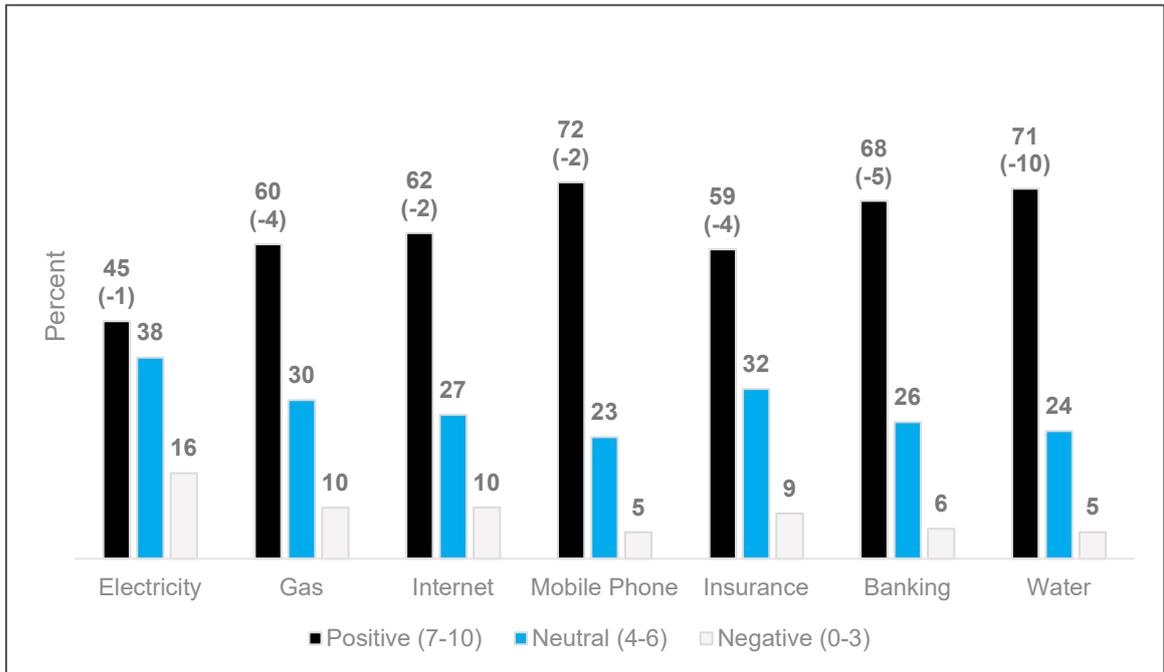


Satisfaction with utilities and services

While the rating of the electricity services has remained roughly the same, NSW consumers still rate it behind all other utilities and services.

- The satisfaction with gas services has decreased compared to June 2018 (down 4% to 60%).

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



Base: Consumers in NSW with each service

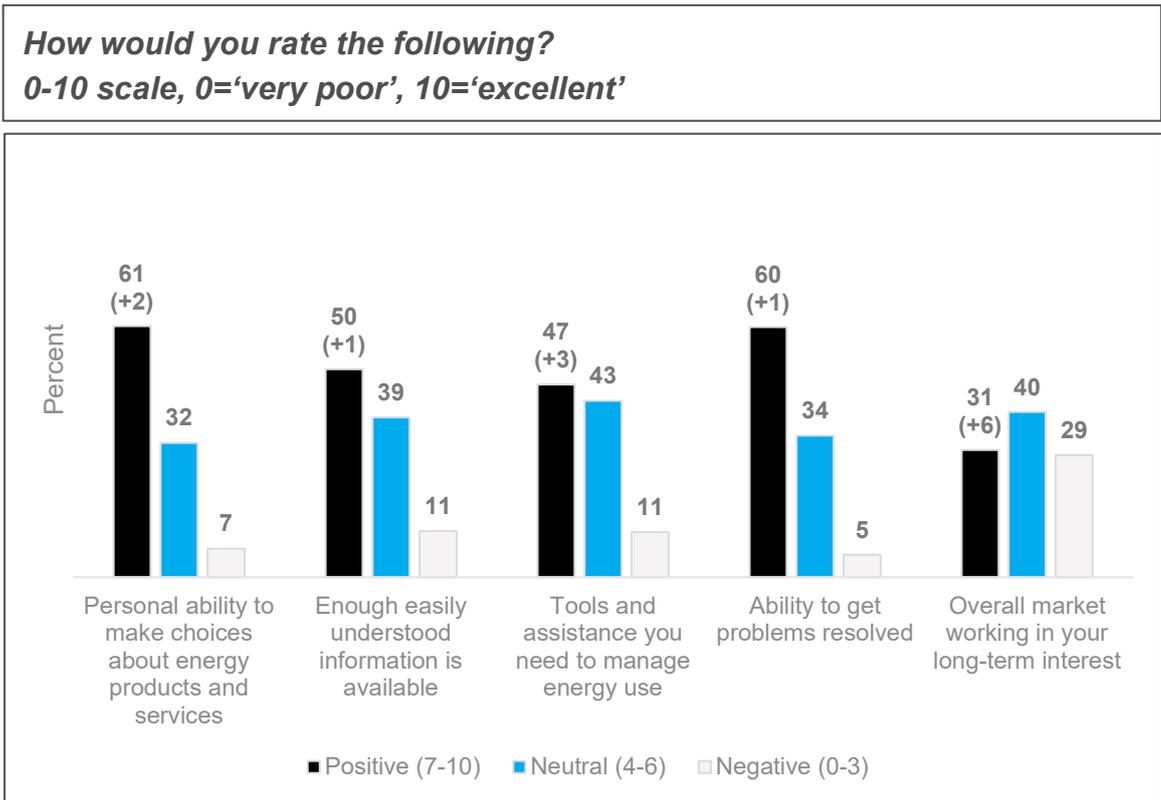


Confidence

Confidence in information, tools and a working market

There is little change amongst NSW consumers in terms of their confidence in their ability to make choices, resolve issues or source information, but confidence in the overall market has increased since June 2018.

- 61% are confident in their personal ability to make choices about energy products and services (up 2%); and 60% are confident in their ability to get problems resolved (up 1%).
- 50% say they are confident there is enough easily understood information available to make choices about energy services (up 1%); and 47% say they are confident they have the tools and assistance they need to manage their energy use and costs (up 3%).
- The proportion who think that the overall market is working in their long-term interests has increased by 6% from a low base of 25%.



Base: Consumers in NSW (n=404)

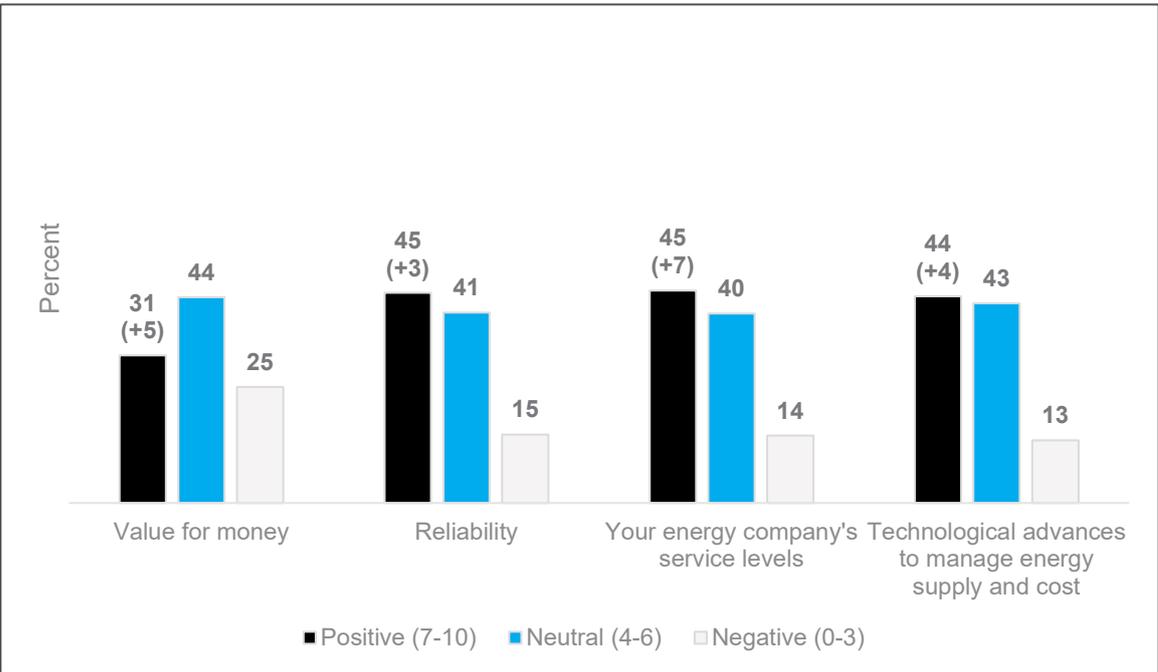


Confidence in long term outcomes

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

- 31% of NSW household consumers say they are confident that value for money outcomes will improve in the future (up 5% compared to last year).
- 45% say they are confident in the reliability of their energy service improving (up 3%).
- 44% say they are confident in the likelihood of future technological advances to manage energy supply (up 4%).
- 45% say they are confident their energy company's service levels will improve in the future (up 7%).

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



Base: Consumers in NSW (n=404)

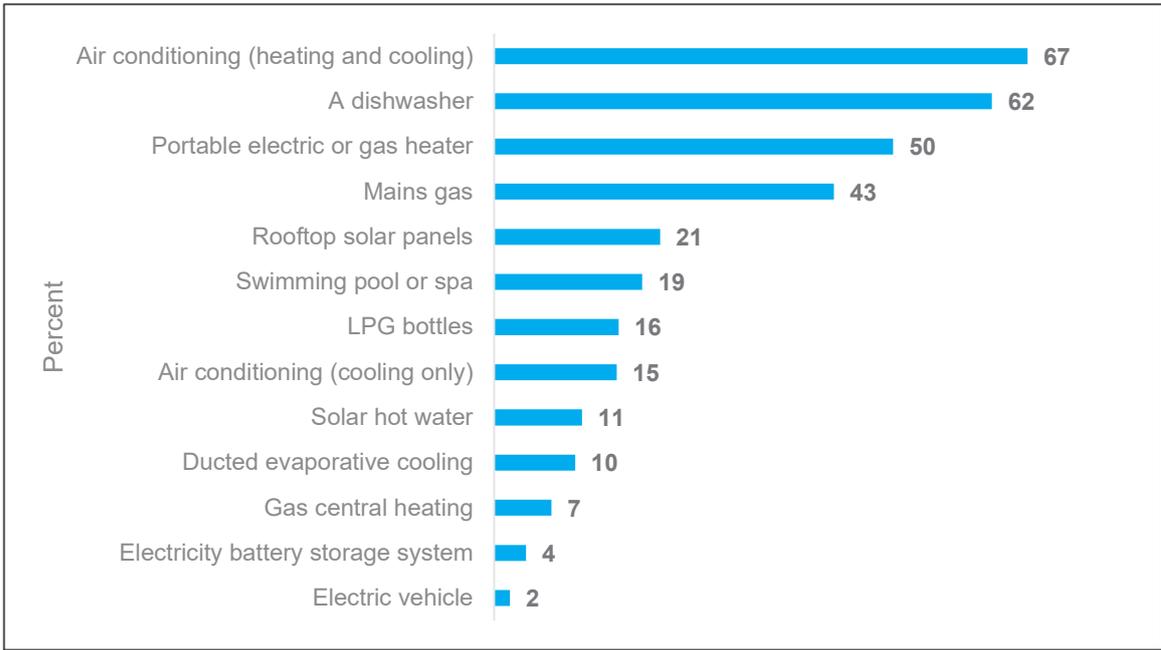


Use of technologies

About 1 in 5 consumers in NSW report having rooftop solar panels.

- While 20% say they have a digital/smart meter, just half (10%) say they use it to manage their energy use and costs.

Which of the following do you have at your home?



Base: Consumers in NSW (n=404)

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



Base: Consumers in NSW (n=404)

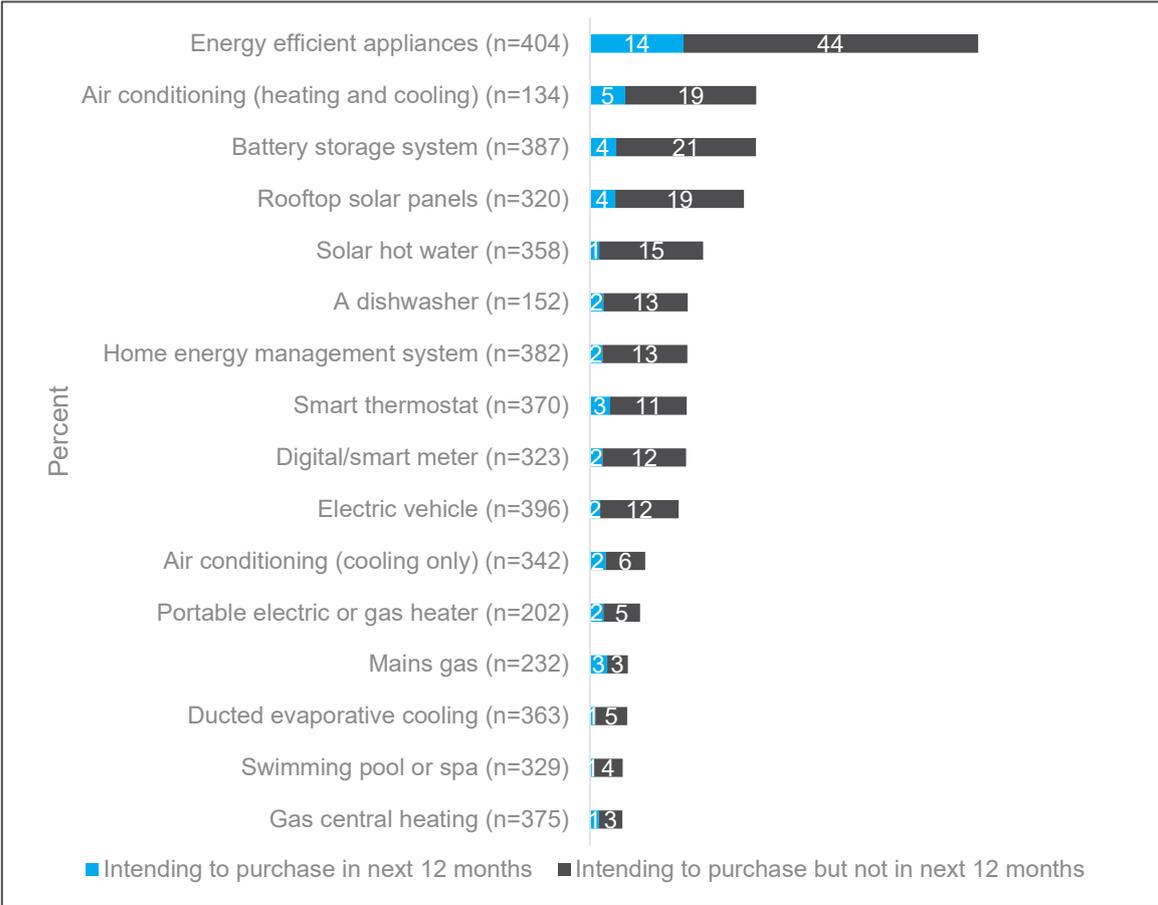


Uptake of technologies

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

- Of the households who report having solar panels, 63% have expressed interest in adding electricity battery storage systems to their homes.
- 58% say they intend to purchase energy efficient appliances and 14% plan to do so in the next 12 months.
- Of those who do not already have rooftop solar, 23% say they intend to install solar panels (4% in the next 12 months), and 25% 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?



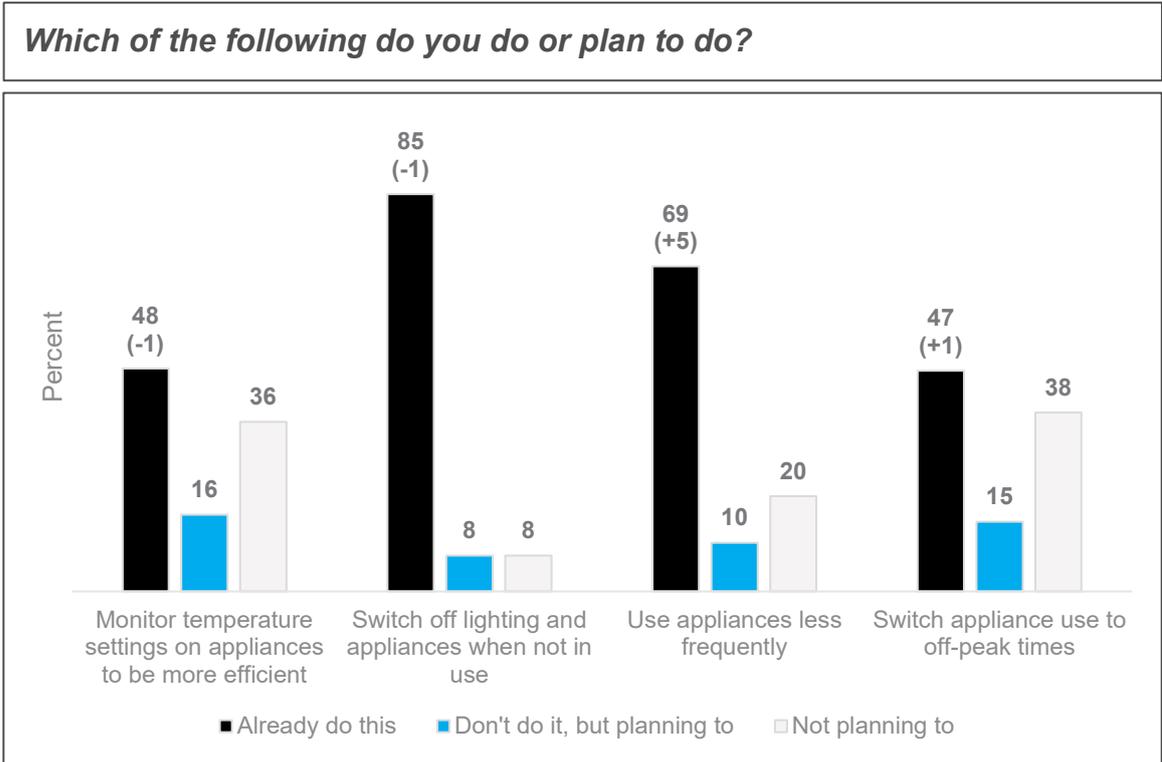
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in New South Wales



Energy saving practices

The proportion of NSW household consumers claiming that they are already using appliances less frequently has increased, while there is little change in the other aspects measured here.

- 85% say they already switch off lighting and appliances when not in use (down 1%).
- 69% say they already use appliances less frequently to conserve energy (up 5%).
- 48% say they monitor temperature settings on appliances to be more efficient (down 1%).
- Almost half of all NSW household consumers surveyed (47%) say they already switch appliance use to off-peak times (up 1%).



Base: Consumers in NSW (n=404)

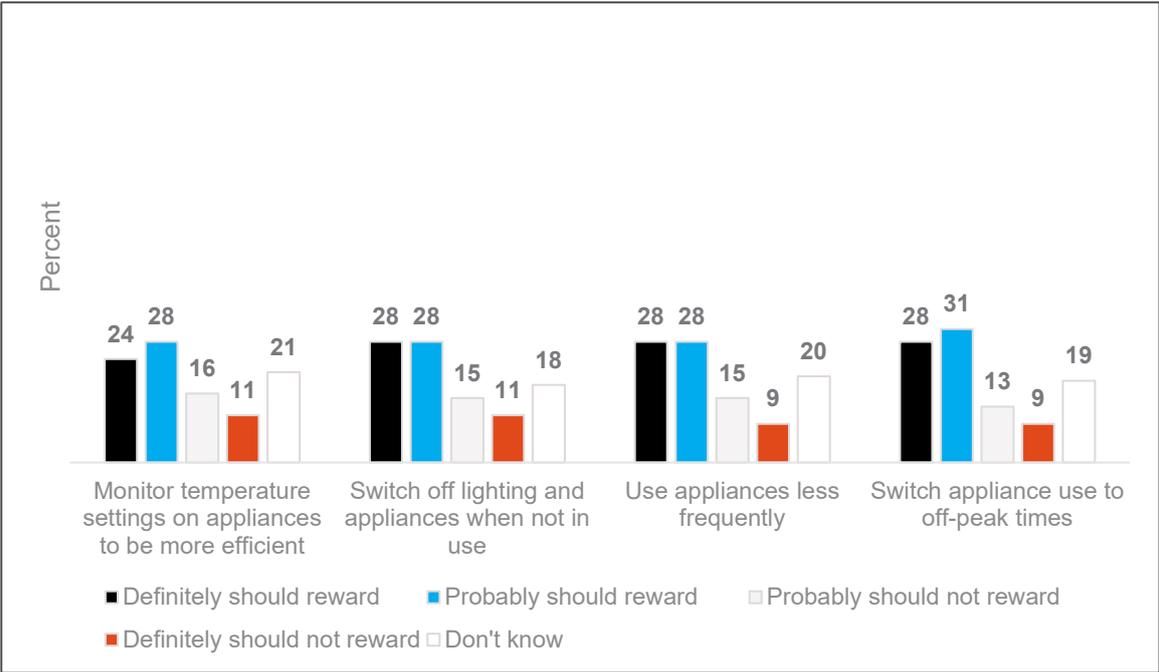


Reward for reducing energy use

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

- 56% think customers should be rewarded for switching off lighting and appliances when not in use.
- 59% think customers should be rewarded for switching appliance use to off-peak times.
- 56% think customers should be rewarded for using appliances less frequently.
- 52% 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:



Base: Consumers in NSW (n=404)

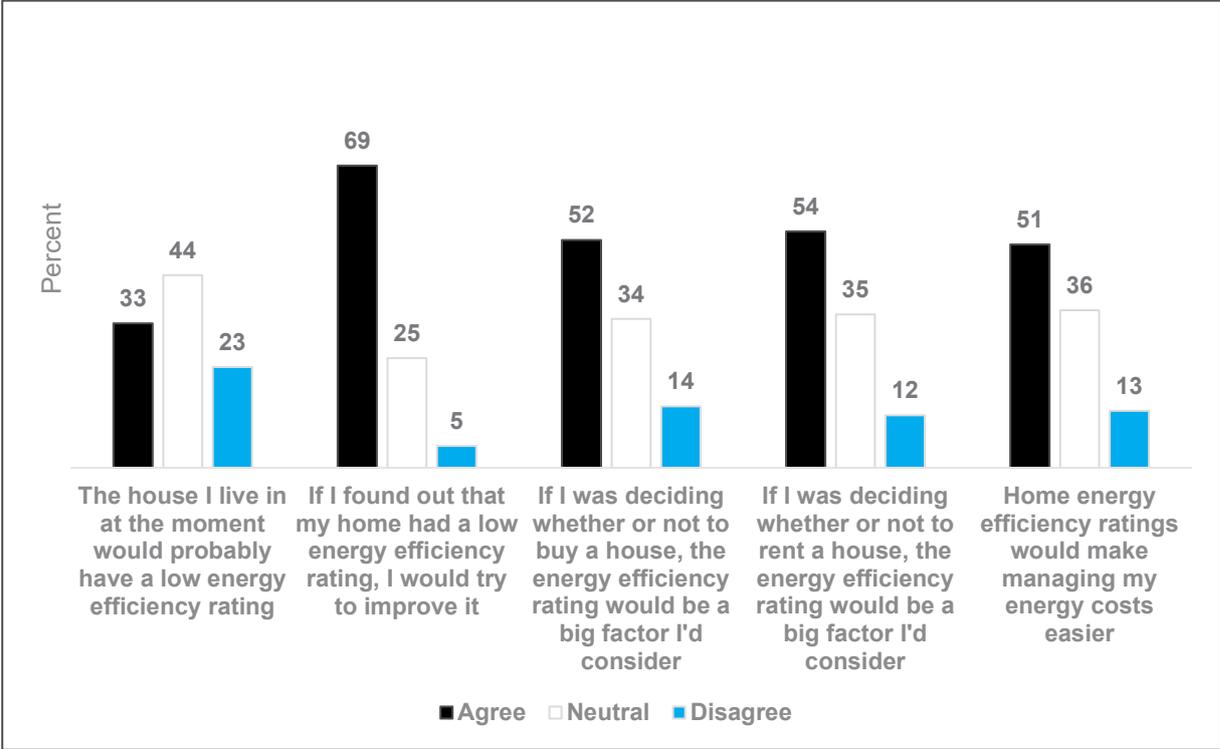


Housing energy efficiency

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

- 69% said they would try to improve their home’s energy rating if they found out it had a low rating.
- 54% of renters said that an energy rating would be a big factor they would consider when renting a house.
- 52% said that an energy rating would be a big factor they would consider when buying a house.
- 51% said that a home energy efficiency rating would make managing their energy costs easier.
- Only 23% disagree with the statement that the house they live in would have a low energy efficient rating.

Do you agree or disagree with the following?



Base for Statement 1, 3 & 5: Consumers in NSW (n=404)

Base for Statement 2: Home-owners in NSW (n=291)

Base for Statement 4: Renters in NSW (n=104)

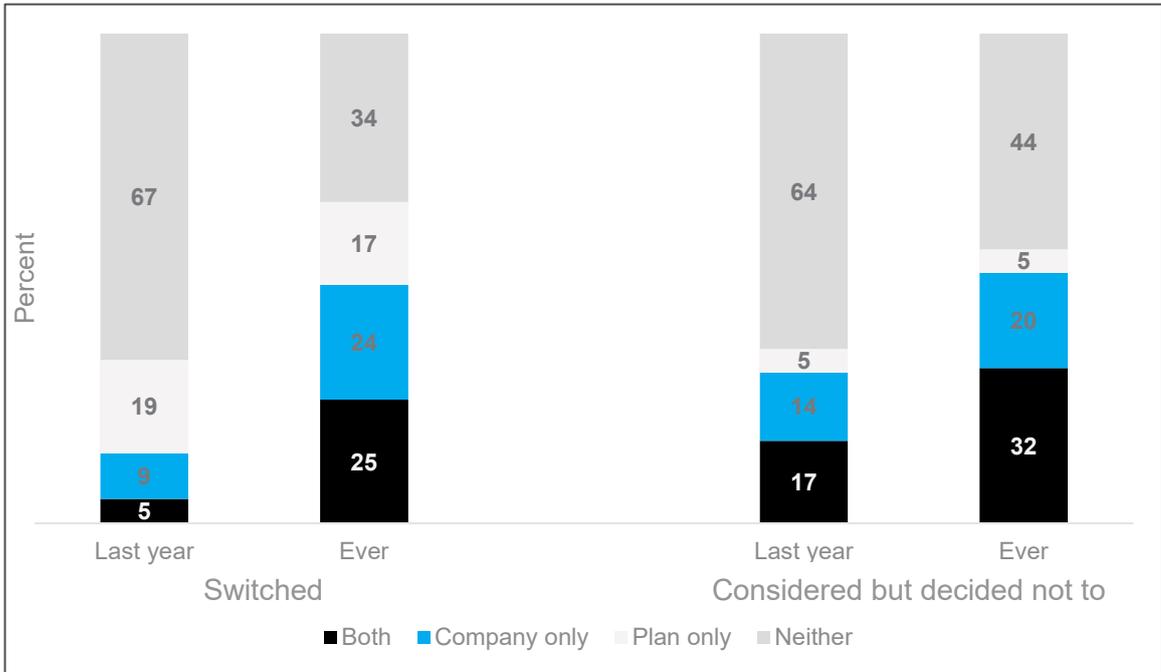


Switching behaviour

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

- 33% say they have switched companies, plans or both in the past year.
- 34% report that they have never switched companies or plans.
- 36% say they considered switching companies or plans in the past year but did not actually do so at the time.

Which of the following have you done?



Base: Consumers in NSW (n=404)



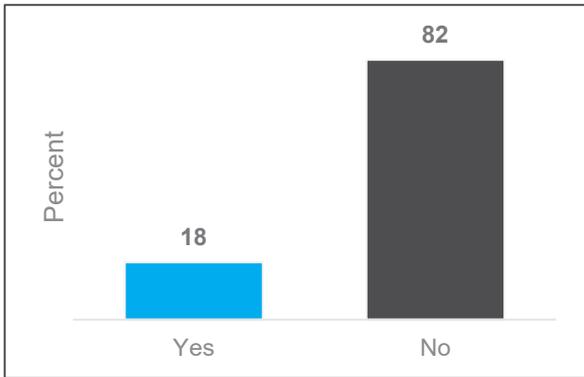
Activity

Reasons for considering switching

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

- 33% 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.
- 18% say they intend to switch plans or retailers in the next year.

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



Base: Consumers in NSW (n=404)

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



Base: Consumers in NSW who have switched or looked at switching in the past (n=272)

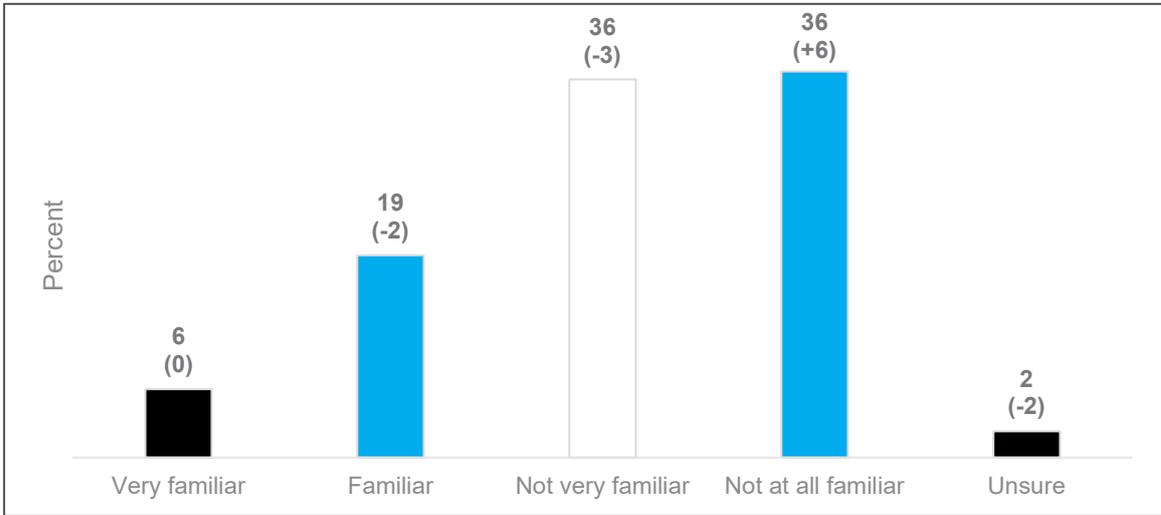


Other

Awareness of the Energy Ombudsman

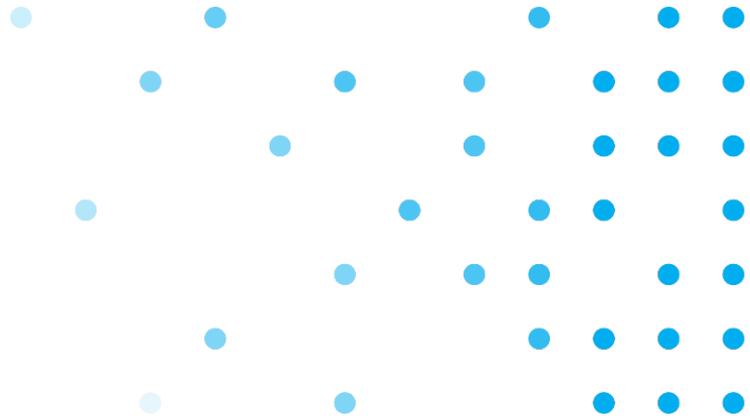
25% of NSW consumers said they are very familiar or familiar with the Energy Ombudsman.

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



Base: Consumers in NSW (n=404)

Victoria





Satisfaction

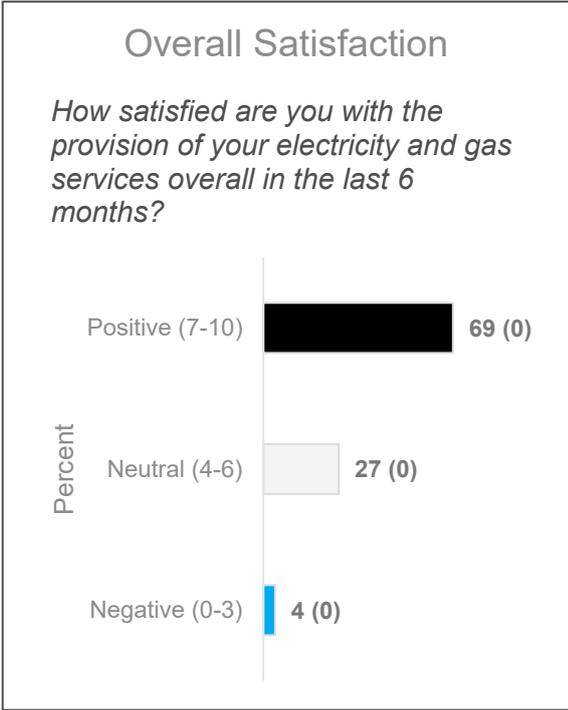
Overall satisfaction

Satisfaction with the provision of electricity and gas services overall is unchanged since June 2018.

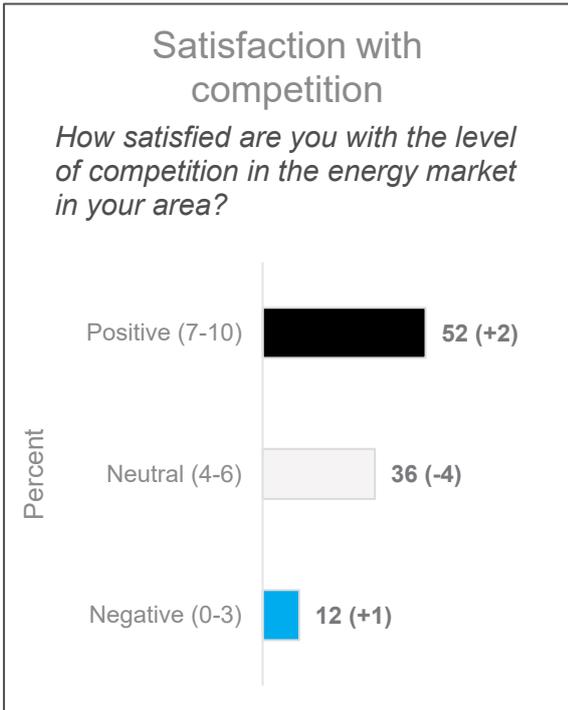
- 69% are satisfied with their electricity and gas services.

Satisfaction with the level of competition has increased.

- 52% are positive about the level of competition in the energy market in their area, up 2%.



Base: Consumers in VIC (n=400)



Base: Consumers in VIC (n=400)

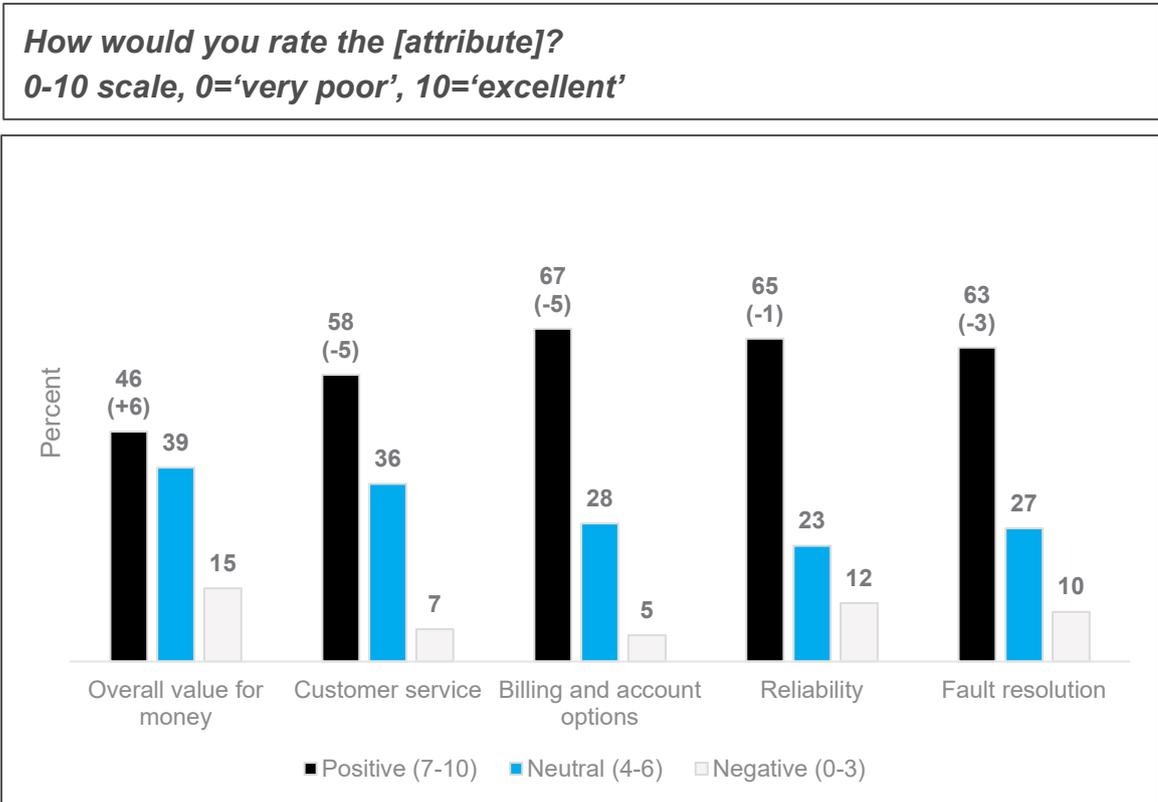


Satisfaction

Satisfaction with electricity

Satisfaction with the value for money of electricity has increased, off a low base, since June 2018.

- 46% are satisfied with the overall value for money of their electricity, up 6%.
- Satisfaction with reliability is down marginally to 65%.
- 63% are satisfied with their fault resolution, down 3%.
- 67% are satisfied with their billing and account options, down 5%.
- 58% are happy with their customer service, down 5%.



Base: Consumers in VIC with electricity supply (n=400)
Base for fault resolution: Those who had a power outage or rated 0 to 9 satisfaction with outage in VIC (n=250)



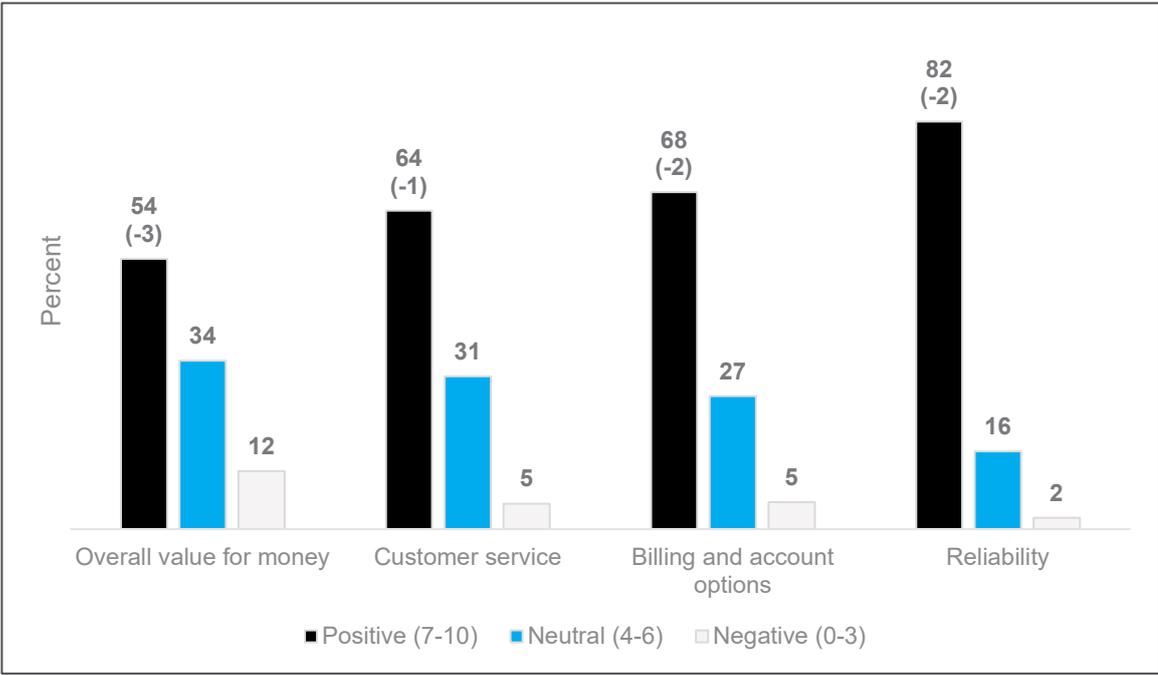
Satisfaction

Satisfaction with gas

Satisfaction with gas services is down marginally.

- 54% are satisfied with the value for money of their gas service, down 3%.
- 64% are satisfied with their gas provider’s customer service, down marginally.
- 68% of Victorian gas consumers are happy with the available billing and account options.
- The proportion satisfied with the reliability of their gas service decreased by 2% to 82%. 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 gas consumers (n=351)

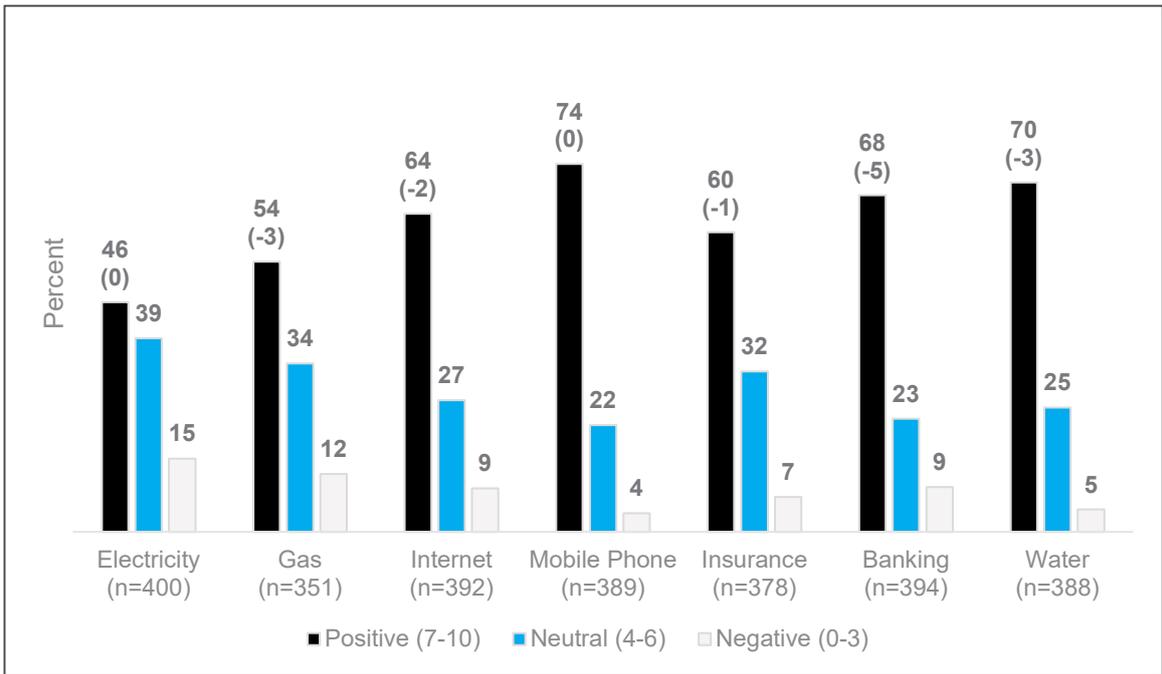


Satisfaction

Satisfaction with utilities and services

In terms of value for money, satisfaction with electricity and gas remain the lowest-ranked services on this measure.

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



Base: Consumers in VIC with each service

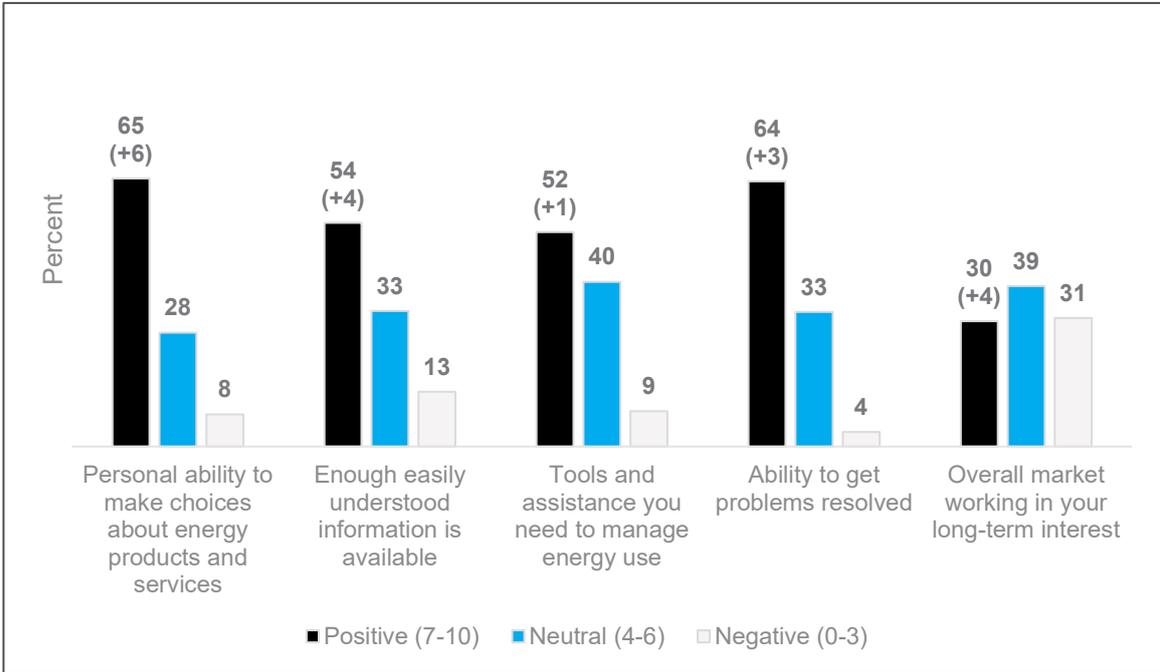


Confidence in information, tools and a working market

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.

- 64% are confident about their ability to get problems resolved, up 3%. And 65% are confident in their own ability to make choices about energy products and services, up 6%.
- 54% are confident there is enough easily understood information available to support their decision making about energy products and services (up 4%).
- 52% are confident in the tools and assistance they need to manage their energy use (up marginally);
- Only 30% are confident the overall market is working in their long-term interests (up 4%).

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



Base: Consumers in VIC (n=400)



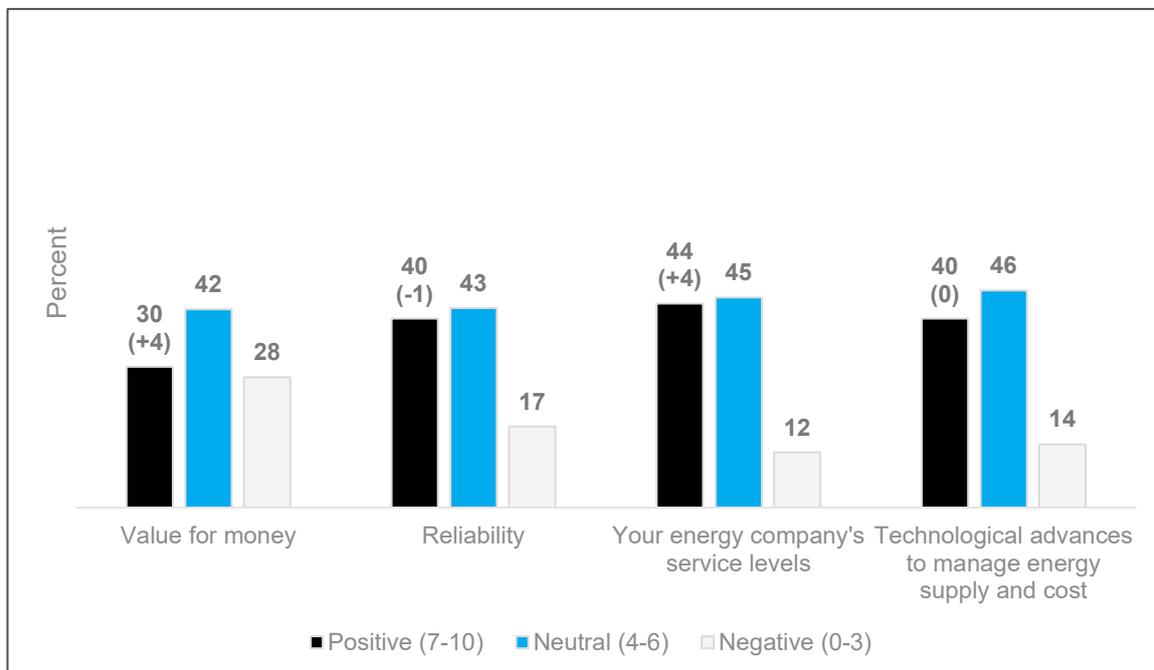
Confidence in long term outcomes

Consumer confidence in the energy market delivering better customer service and value for money in general has increased off a low base.

- Confidence in improved long-term value for money for energy services has increased (up 4% to 30%).
- Confidence that customer service outcomes will improve in the future is at 44%, up 4%.
- Consumer confidence in technological advances to manage energy supply and cost remains unchanged at 40%.
- Confidence that the reliability of energy supply will improve in the future has fallen marginally to 40%.

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

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



Base: Consumers in VIC (n=400)

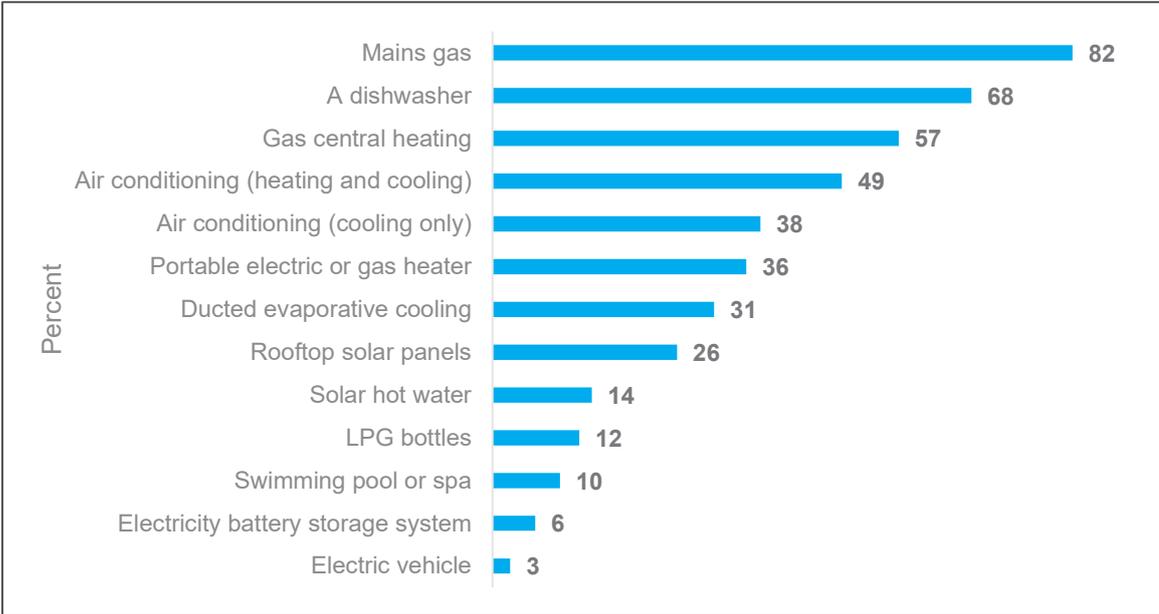


Use of technologies

Victorian households have the highest uptake of digital/smart meters, but only about a quarter say they currently use the device to manage their energy costs.

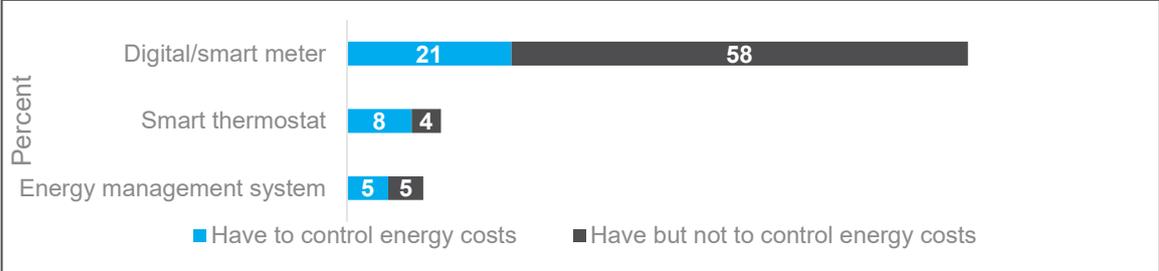
- 57% say that they have gas central heating, and 49% say they have air conditioning for both heating and cooling. 25% say they have both.
- 36% say they have a portable electric or gas heater.

Which of the following do you have at your home?



Base: Consumers in VIC (n=400)

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



Base: Consumers in VIC (n=400)



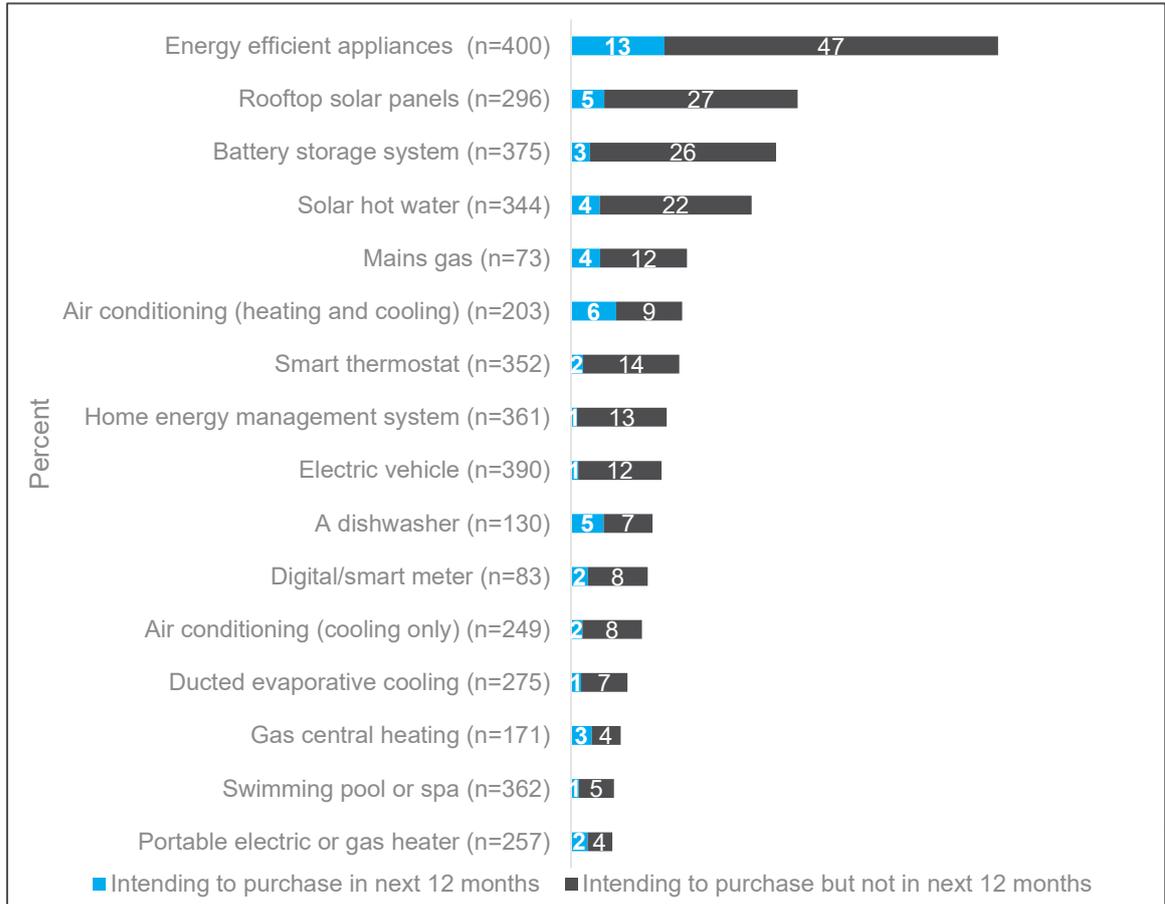
Activity

Uptake of technologies

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

- Of those households who report having solar panels, 56% have expressed interest in adding battery storage systems.
- Of those who do not currently have solar panels, 32% say they are considering installing them, including 5% who say they intend to do so in the next 12 months.
- 29% 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?



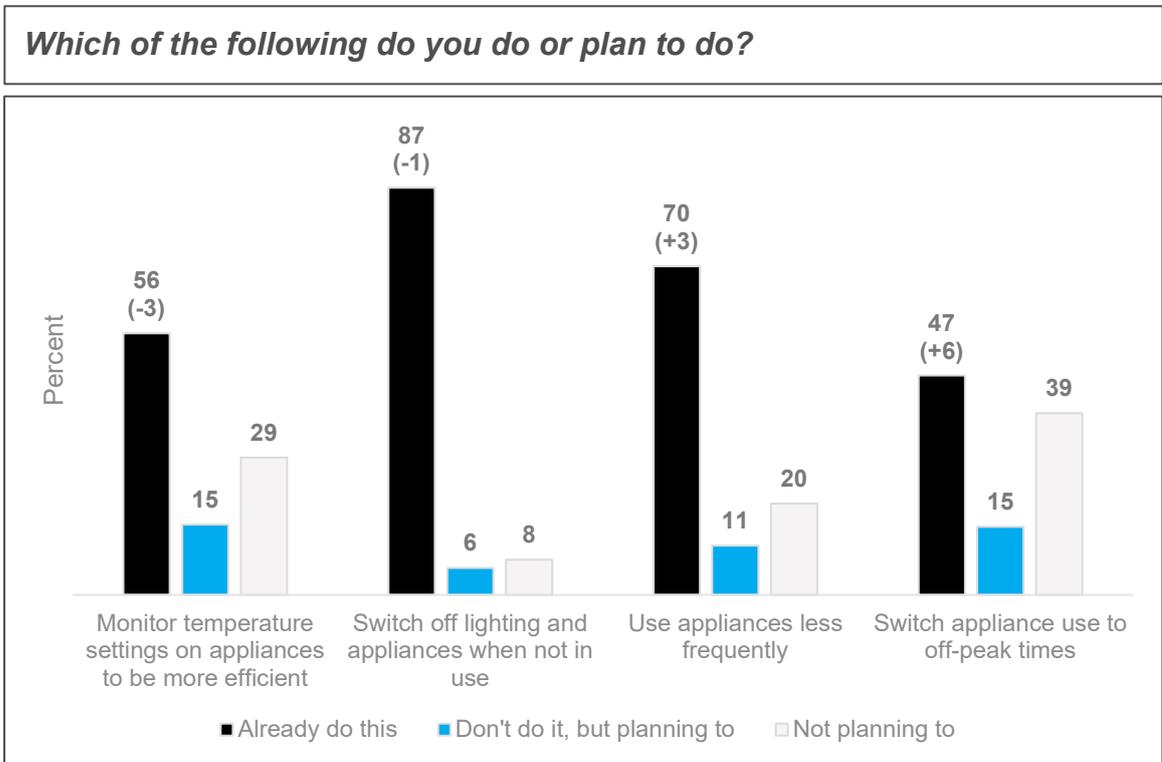
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Victoria



Energy saving practices

Most Victorian consumers say they are taking a range of steps to manage their energy use and costs.

- 87% say they switch off lighting and appliances when not in use (down 1%).
- 70% say they are using appliances less frequently (up 3% to 70%).
- Almost half (47%) say they are already switching appliance use to off-peak times (up 6%).



Base: Consumers in VIC (n=400)

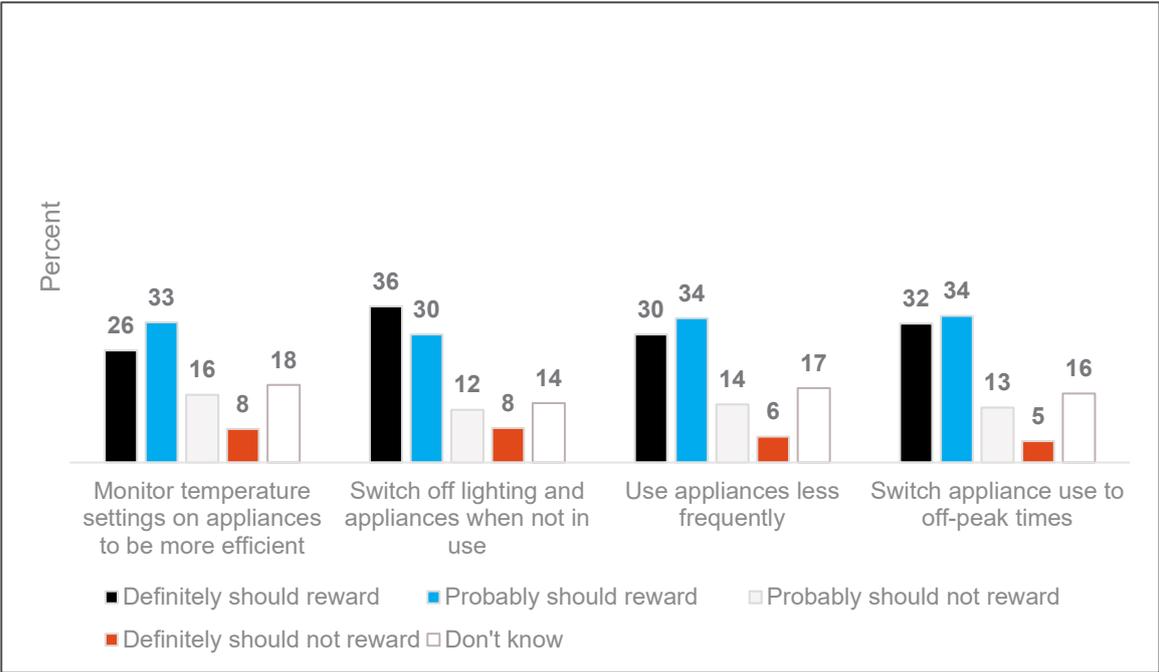


Reward for reducing energy use

Around a third of Victorian household consumers think customers should be rewarded for taking action to reduce their energy usage.

- 66% think customers should be rewarded for switching off lighting and appliances when not in use.
- 66% think customers should be rewarded for switching appliance use to off-peak times.
- 64% think customers should be rewarded for using appliances less frequently.
- 59% 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:



Base: Consumers in VIC (n=400)

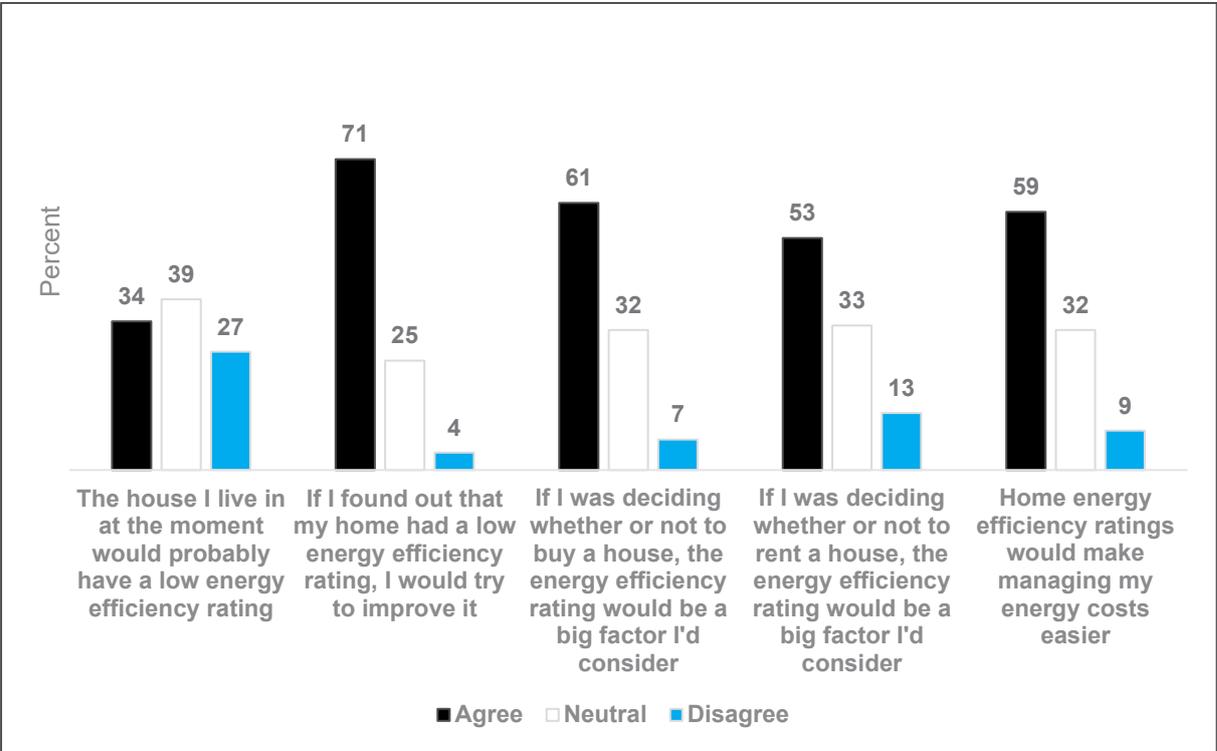


Housing energy efficiency

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

- 71% 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 buying a house.
- 59% said that a home energy efficiency rating would make managing their energy costs easier.
- 53% of renters said that an energy rating would be a big factor they would consider when renting a house.
- Only 29% disagreed with the statement that the house they live in at the moment would probably have a low energy efficiency rating.

Do you agree or disagree with the following?



Base for Statement 1, 3 & 5: Consumers in VIC (n=400)

Base for Statement 2: Home-owners in VIC (n=321)

Base for Statement 4: Renters in VIC (n=75)

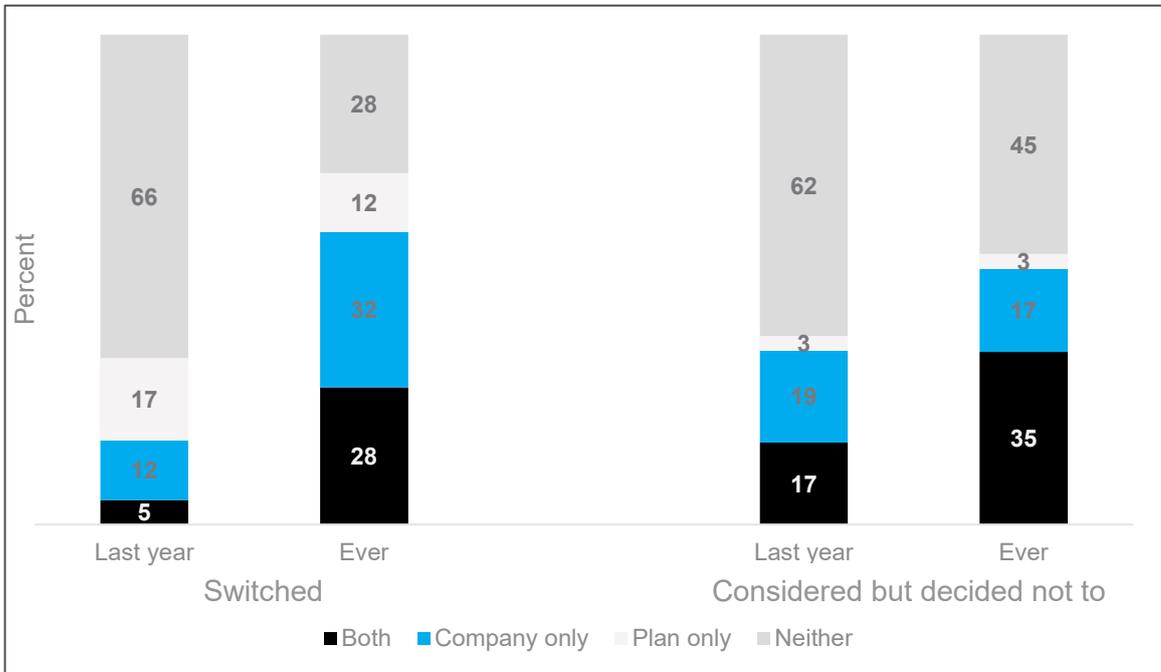


Switching behaviour

Around a third of Victorian household consumers report having switched companies or plans recently.

- 34% of Victorian household consumers report having switched energy companies or plans in the last year, and 39% say they considered switching but did not do so.
- 28% say they have never switched companies or plans.

Which of the following have you done?



Base: Consumers in VIC (n=400)

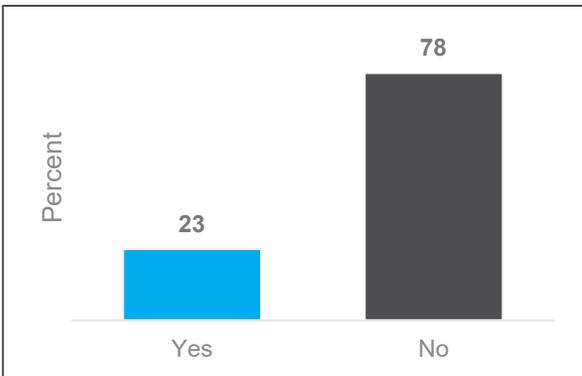


Reasons for considering switching

Many are using price comparison websites when looking at switching and low value for money continues to be a driver to search around for a better deal.

- 40% 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, 36% said they were dissatisfied with the value for money outcome they were receiving (up 3%).
- 23% of all Victorian household consumers say they intend to switch in the next year.

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



Base: Consumers in VIC (n=400)

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



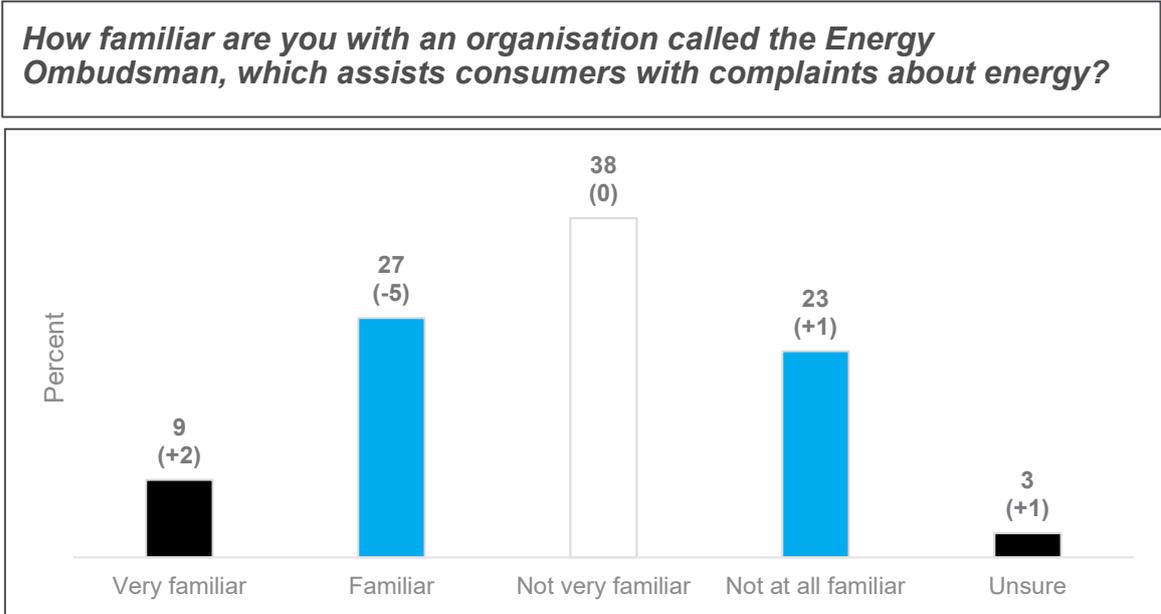
Base: Consumers in VIC who have switched or looked at switching in the past (n=289)



Other

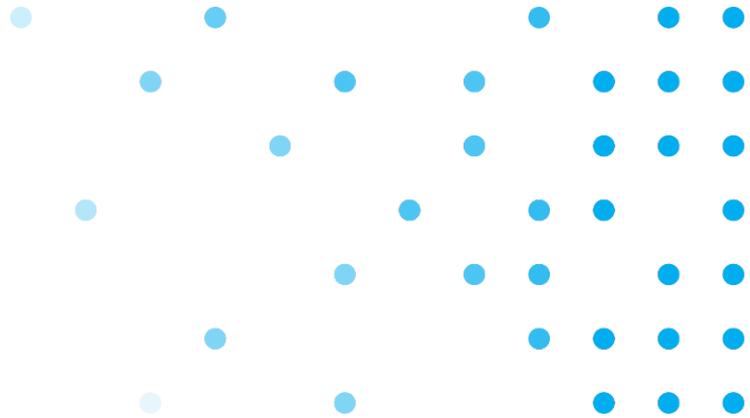
Awareness of the Energy Ombudsman

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



Base: Consumers in VIC (n=400)

Queensland





Overall satisfaction

The proportion of Queensland household consumers satisfied with the provision of electricity and gas services overall has increased since June 2018.

- 74% are satisfied, up 6% since last year's survey.

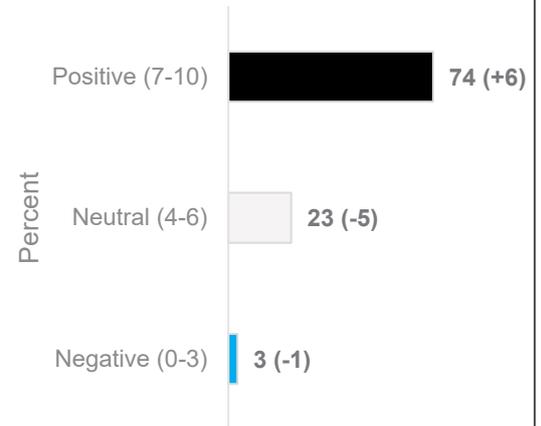
Satisfaction with levels of competition has increased.

- 50% now say they are satisfied with the level of competition in their area, an increase of 9%.

Satisfaction

Overall Satisfaction

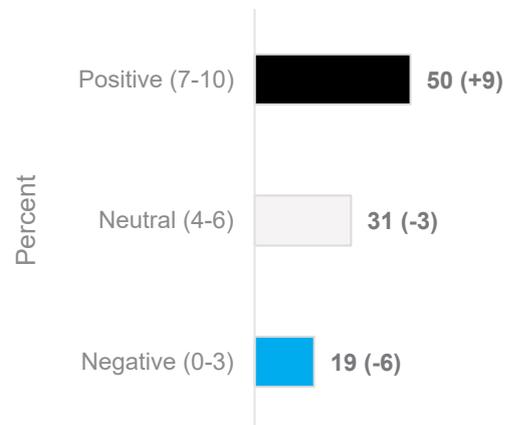
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Base: Consumers in QLD (n=304)

Satisfaction with competition

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



Base: Consumers in QLD (n=304)



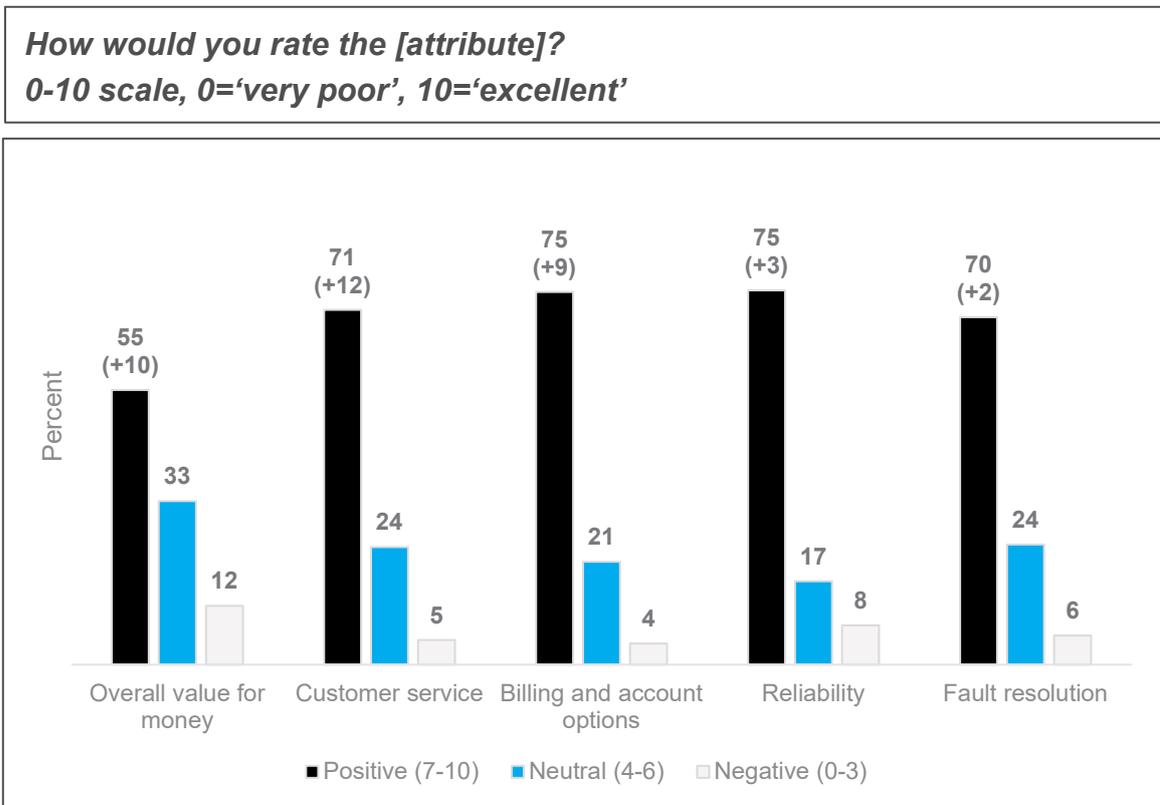
Satisfaction

Satisfaction with electricity

Satisfaction with electricity services has increased across all measures for Queensland household consumers.

The following measures had double-digit increases:

- Customer service (up 12% to 71%).
- Overall value for money (up 10% to 55%).



Base: Consumers in QLD with electricity supply (n=304)
Base for fault resolution: Those in QLD who had a power outage or rated 0 to 9 satisfaction with outage (n=153)



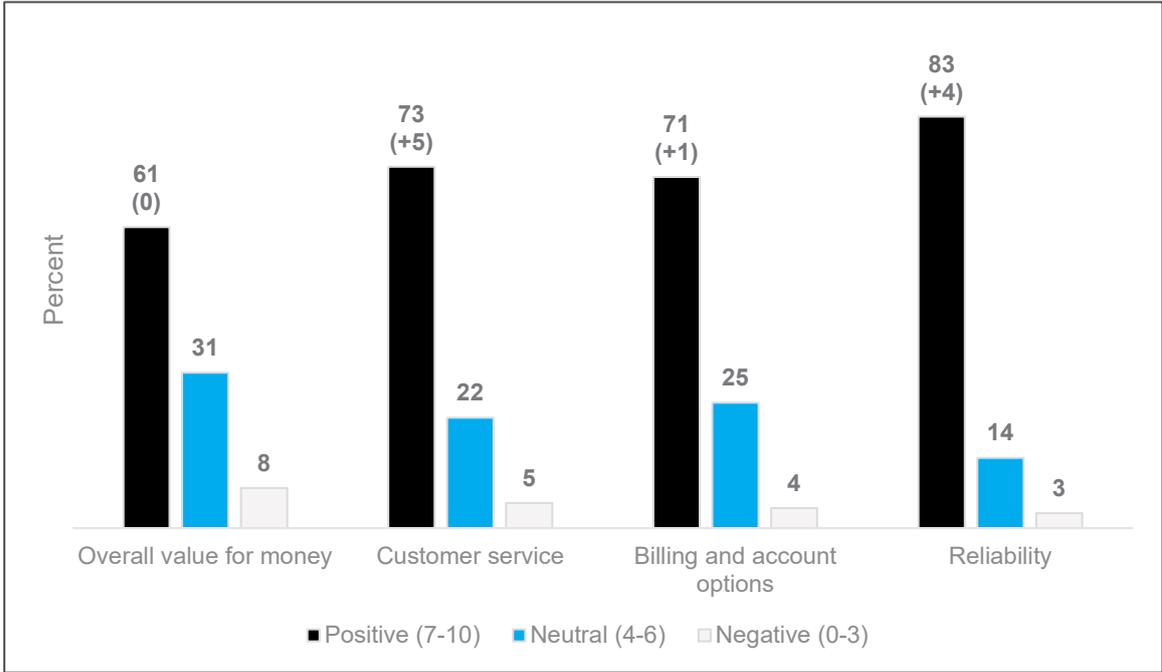
Satisfaction

Satisfaction with gas

Satisfaction with customer service and the reliability of gas services have increased.

- 83% say they are satisfied with the reliability of their gas service (up 4%).
- 73% say they are satisfied with the customer service provided by their gas supplier (up 5%).
- 71% now say they are satisfied with their billing and account options (up 1%).
- 61% say they are satisfied with the overall value for money of their gas service.

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



Base: Consumers in QLD with gas supply (n=99)

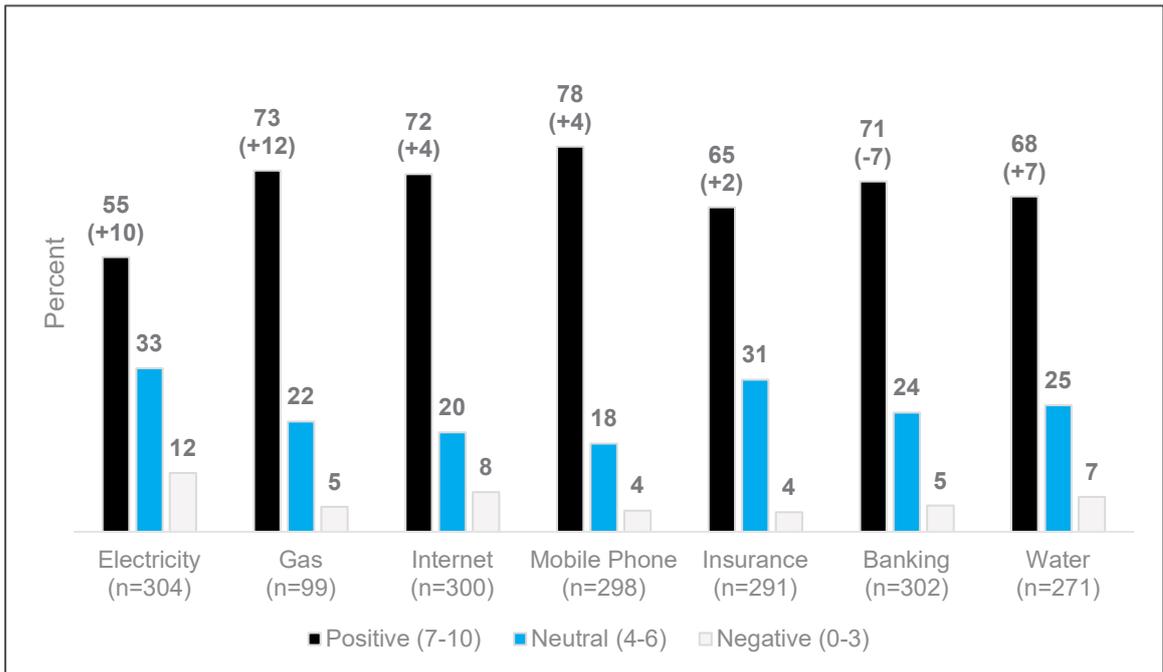


Satisfaction with utilities and services

Satisfaction with value for money among Queensland household consumers has increased for most services, with the biggest improvements in electricity and gas.

- While satisfaction with electricity continues to trail that of other utilities, an increase of 10% to 55% means that a majority are now satisfied with the value for money of their electricity service.
- An increase in satisfaction of 12% to 73% in value for money for gas services means it is now seen as one of the better value services of those considered in this survey.

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



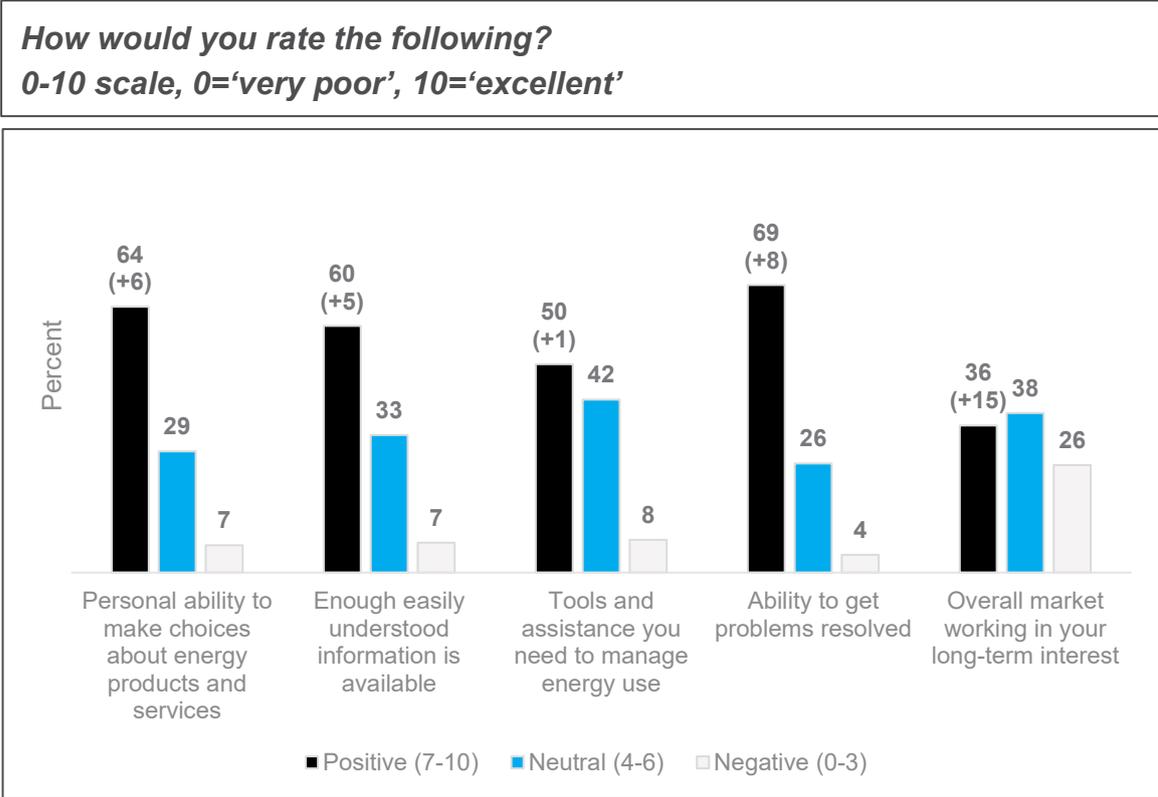
Base: Consumers in QLD with each service



Confidence in information, tools and a working market

Confidence has increased across all measures for Queensland household consumers.

- The largest increase was in the overall market working in consumers' long-term interests (up 15% to 36%).



Base: Consumers in QLD (n=304)



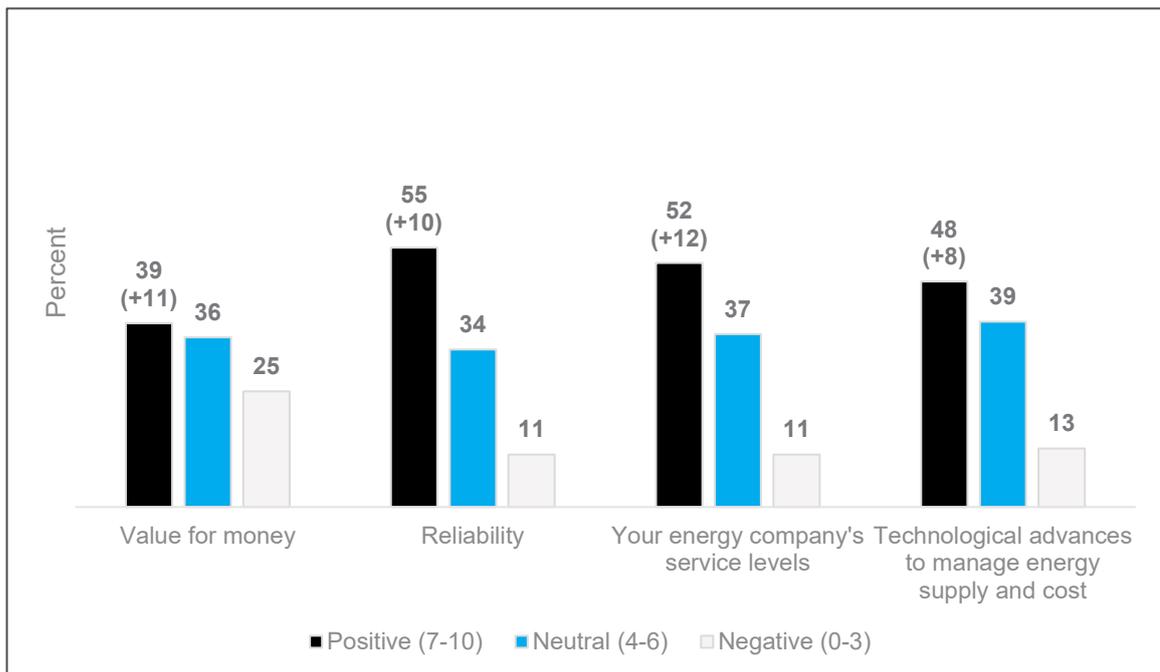
Confidence in long term outcomes

Confidence in better long term outcomes has also increased across all measures.

- The proportion of Queensland household consumers saying they are confident that there will be more reliable services in the future is up 10% to 55%.
- The proportion confident that future technological advances will improve their ability to manage their energy use and costs is up 8% to 48%.
- The proportion confident they will see better service levels in the future is up 12% to 52%.
- The proportion confident of better value for money outcomes in the future is up 11% 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...?

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



Base: Consumers in QLD (n=304)

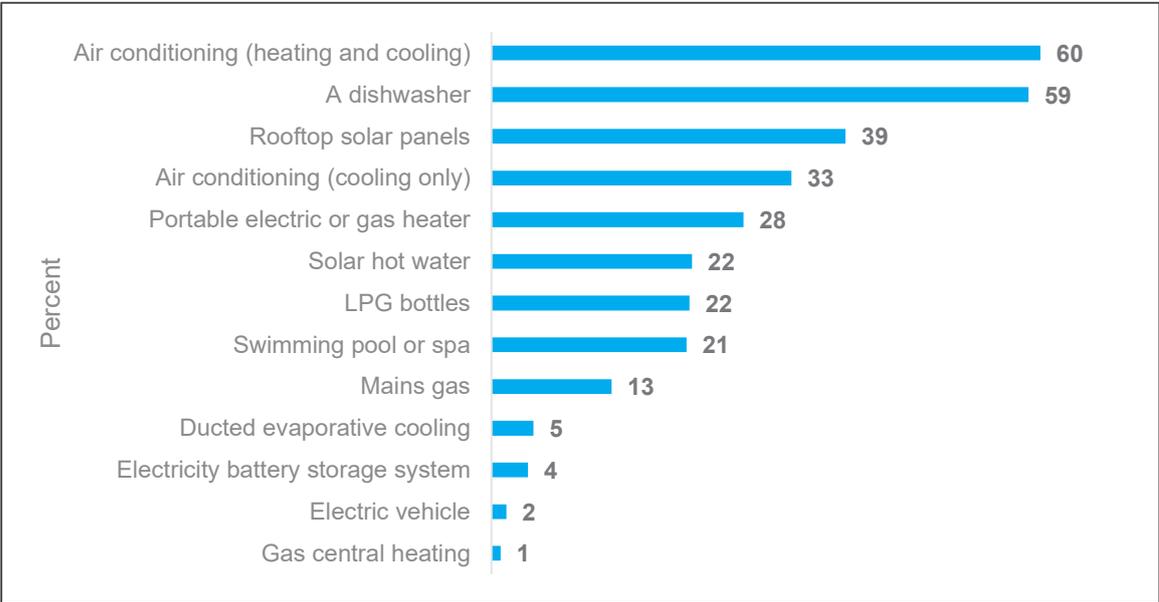


Use of technologies

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

- More than one third of households in Qld report having rooftop solar.
- 18% say they have a smart/digital meter but less than half of those (7%) say they use it to manage their energy use and costs.

Which of the following do you have at your home?



Base: Consumers in QLD (n=304)

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



Base: Consumers in QLD (n=304)

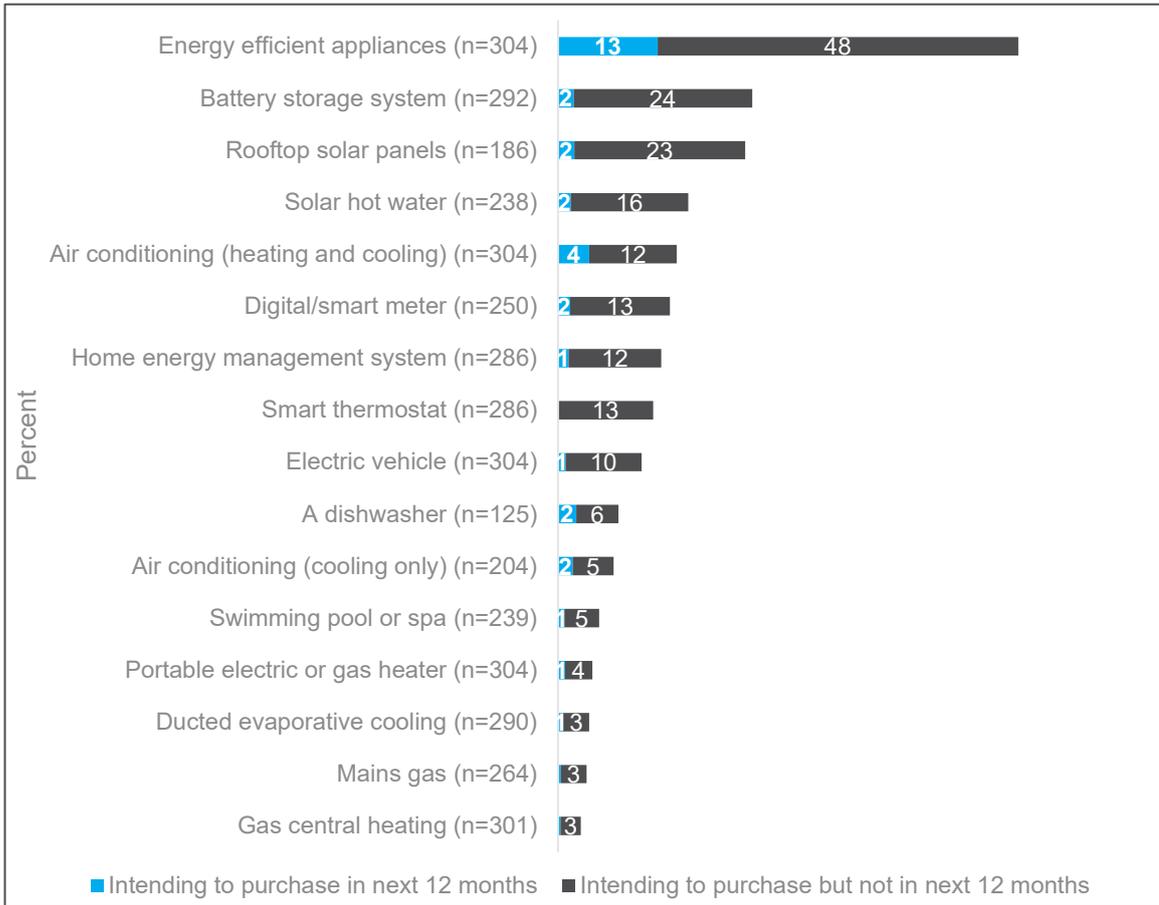


Uptake of technologies

About one in four Queensland consumers intends to invest in a battery storage system and rooftop solar panels for their home.

- Of those households who reported having solar panels, 46% expressed interest in purchasing a battery storage system.
- 61% say that they are considering purchasing energy efficient appliances, and 13% plan to do so in the next 12 months.

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



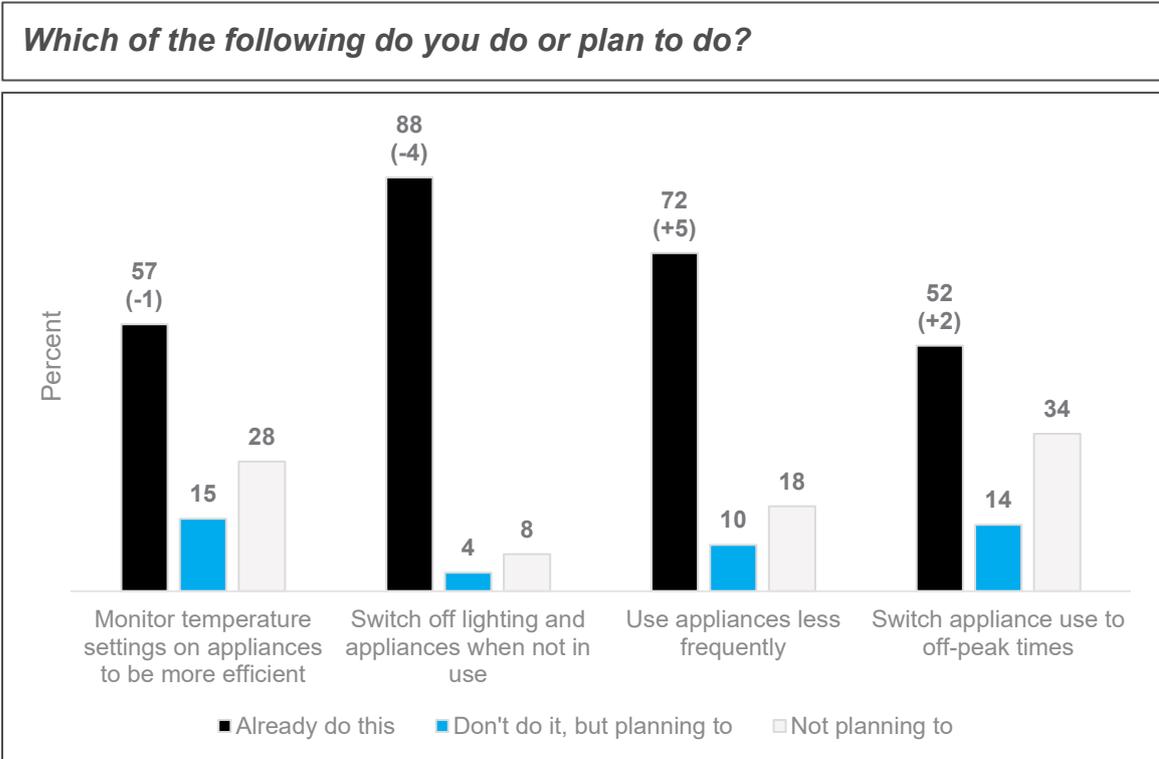
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Queensland



Energy saving practices

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

- The most common actions to save energy are to switch off lights and appliances when not in use (down 4% to 88%) and using appliances less frequently (up 5% to 72%).
- More than half of all consumers say they already switch their appliance use to off-peak times (52%).



Base: Consumers in QLD (n=304)

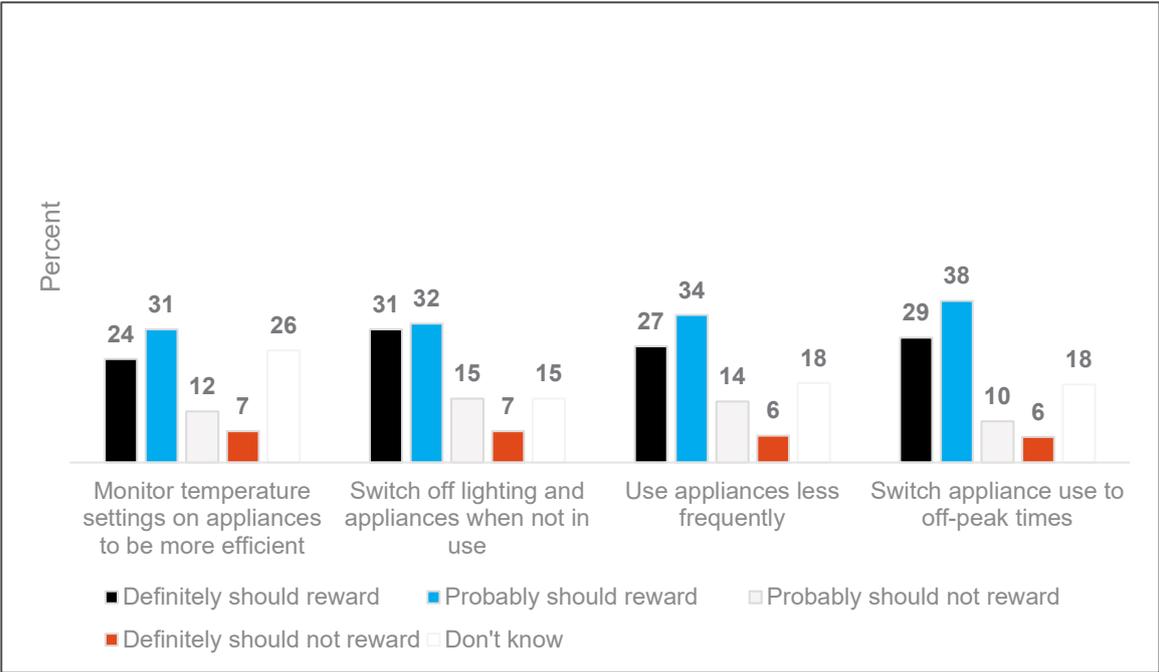


Reward for reducing energy use

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

- 67% think customers should be rewarded for switching appliance use to off-peak times.
- 63% 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.
- 55% 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:



Base: Consumers in QLD (n=304)

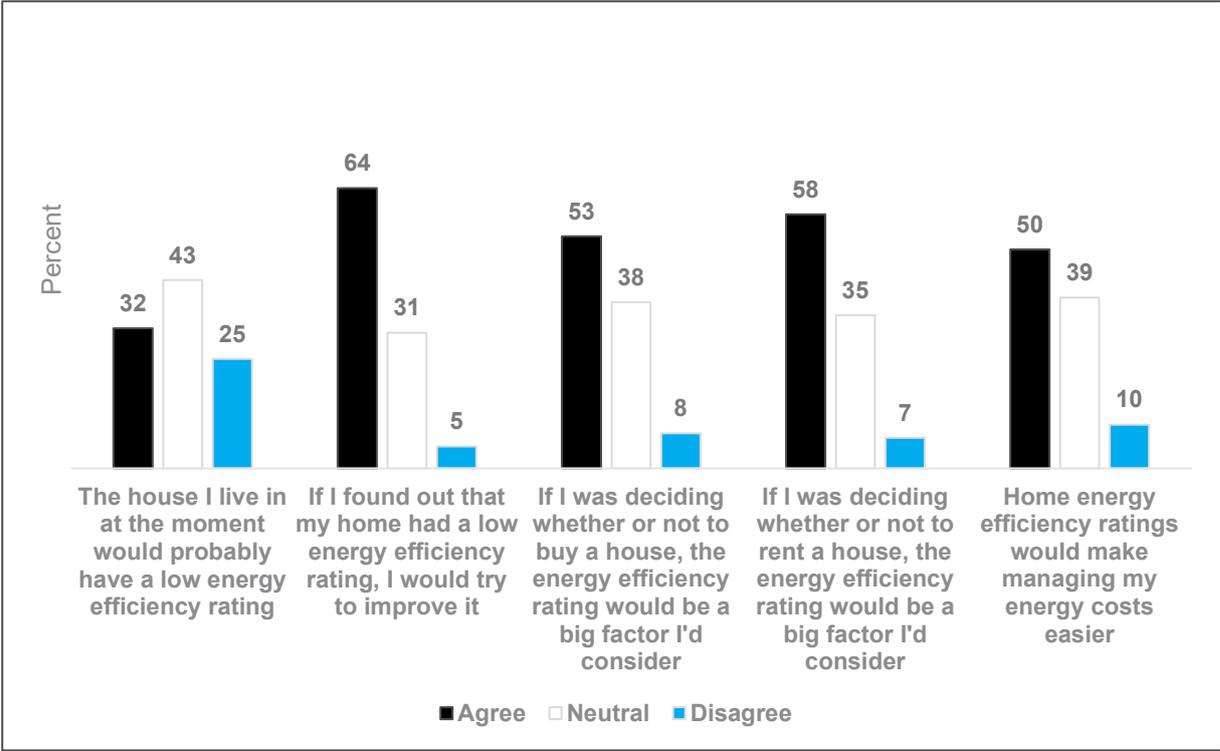


Housing energy efficiency

Few Queensland consumers are confident their home would have a high energy efficiency rating.

- Only 25% disagreed with the statement that their home would probably have a low energy efficiency rating.
- 64% said they would try to improve their home's energy rating if they found out it had a low rating.
- 58% said that an energy efficiency rating would be a big factor they would consider when renting a house.
- 53% said that an energy efficiency rating would be a big factor they would consider when buying a house.
- 50% said that a home energy efficiency rating would make managing their energy costs easier.

Do you agree or disagree with the following?



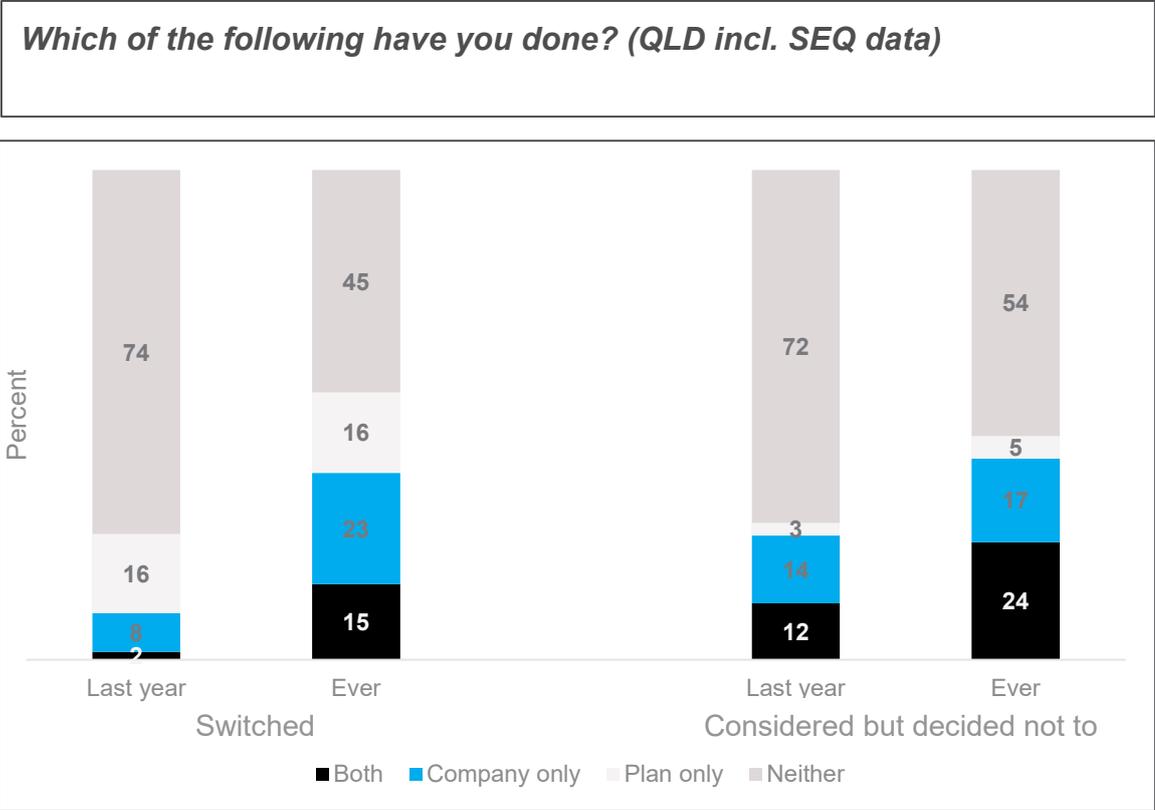
Base for Statement 1, 3 & 5: Consumers in QLD (n=304)
 Base for Statement 2: Home-owners in QLD (n=210)
 Base for Statement 4: Renters in QLD (n=91)



Switching behaviour

Although switching rates for Queensland as a whole are relatively low, declared switching behaviour in the deregulated part of the state (much of South East Queensland) is broadly in line with that in South Australia and NSW.

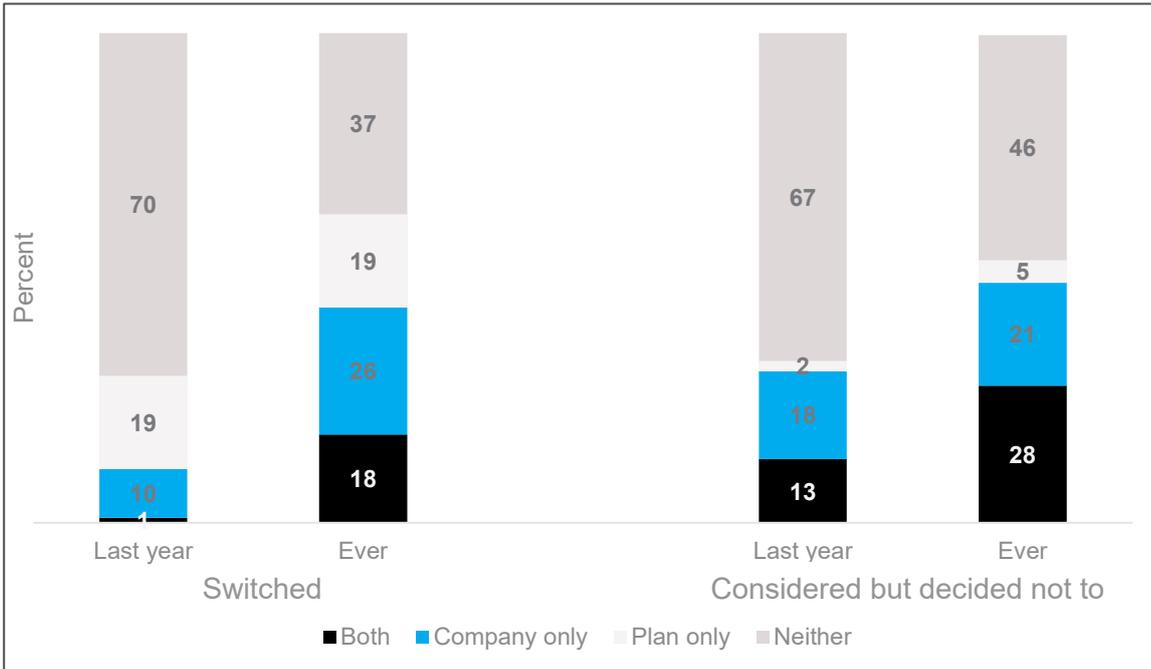
- 26% of Queensland household consumers report having switched companies or plans in the past year, while 29% say they considered it but decided not to in that time.
- 45% report that they have never switched energy companies or plans.



Base: Consumers in QLD (n=304)

- In the deregulated part of the state, 30% report having switched in the past year and 37% say they have never switched.

Which of the following have you done? (SEQ only data)



Base: Consumers in SEQ (n=239)

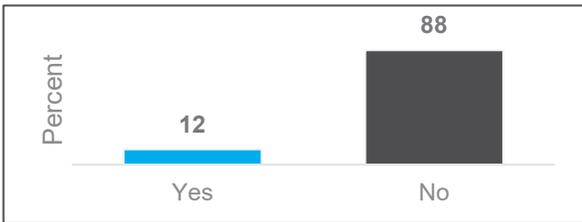


Reasons for considering switching

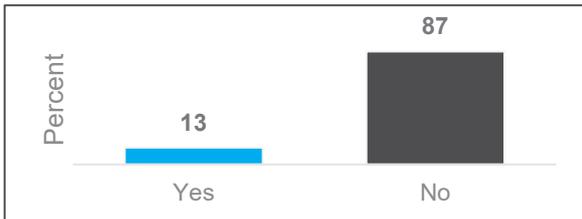
Dissatisfaction with value for money is the most common reason given for considering switching.

- 38% of those who have considered switching say they weren't satisfied with the value for money of their retailer.
- 12% of all Queensland household consumers (and 13% of those in South East Queensland) say they intend to switch energy companies or plans in the next year.

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

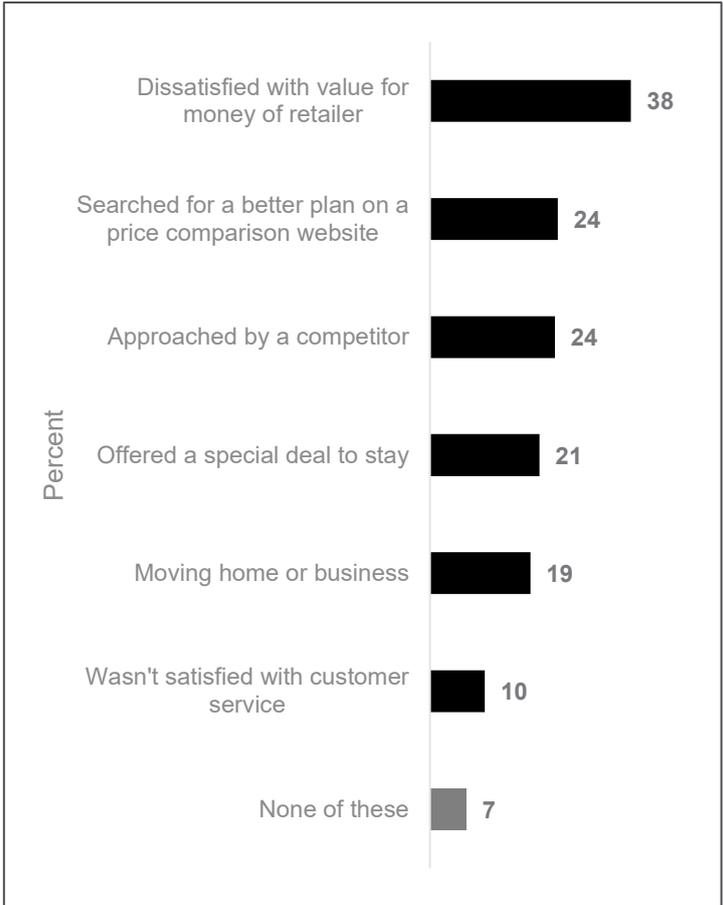


Base: Consumers in QLD (n=304)



Base: SE Consumers in QLD (n=239)

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



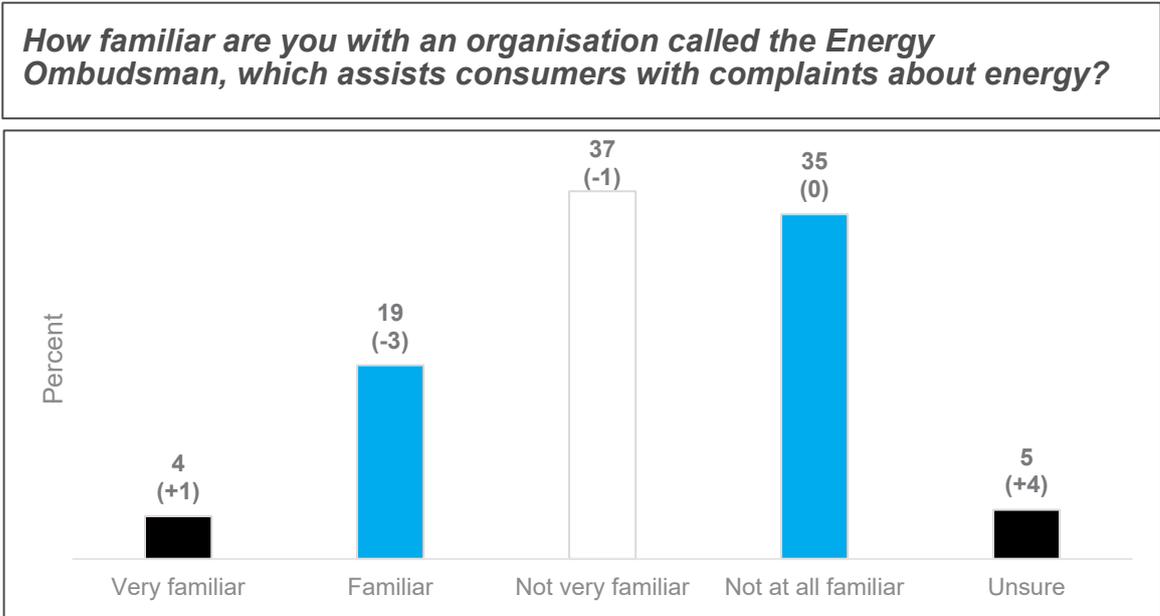
Base: Consumers in QLD who have switched or looked at switching in the past (n=172)



Other

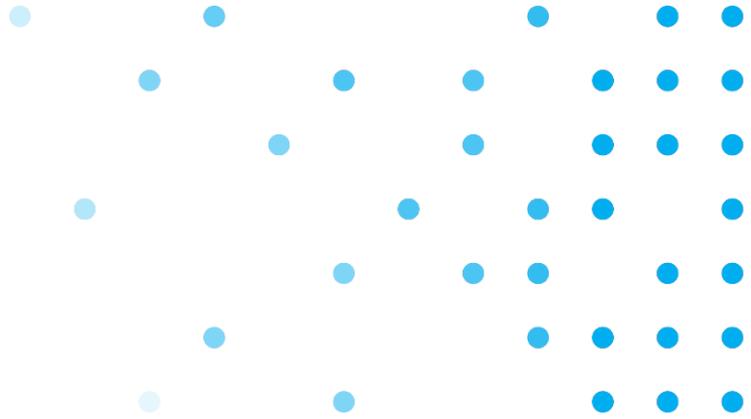
Awareness of the Energy Ombudsman

23% say they are familiar with the Energy Ombudsman in Queensland.



Base: Consumers in QLD (n=304)

South Australia





Overall satisfaction

Overall satisfaction has increased among South Australian household consumers.

- 71% say they are satisfied, up 8% since June 2018.

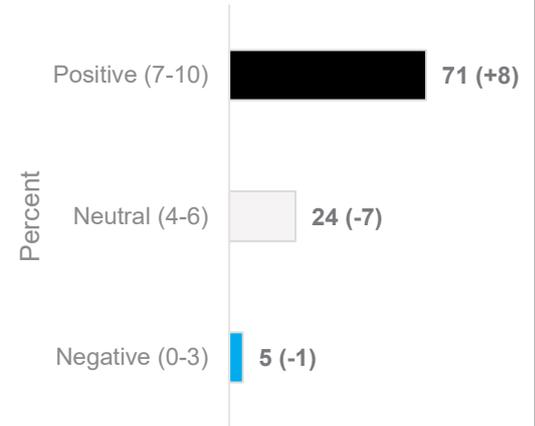
There has also been a small increase in satisfaction with levels of competition.

- Half of South Australian household consumers are satisfied with the competition in the energy market, up by 3% to 50%.

Satisfaction

Overall Satisfaction

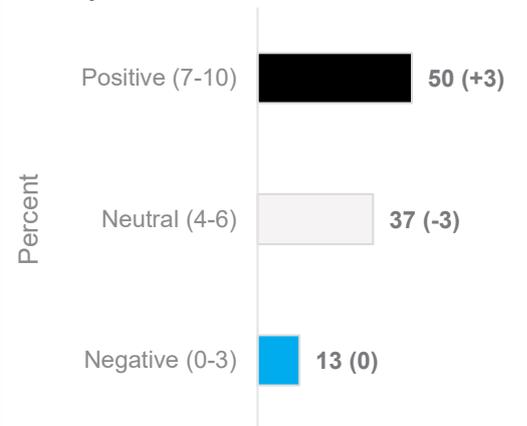
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Base: Consumers in SA (n=305)

Satisfaction with competition

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



Base: Consumers in SA (n=305)

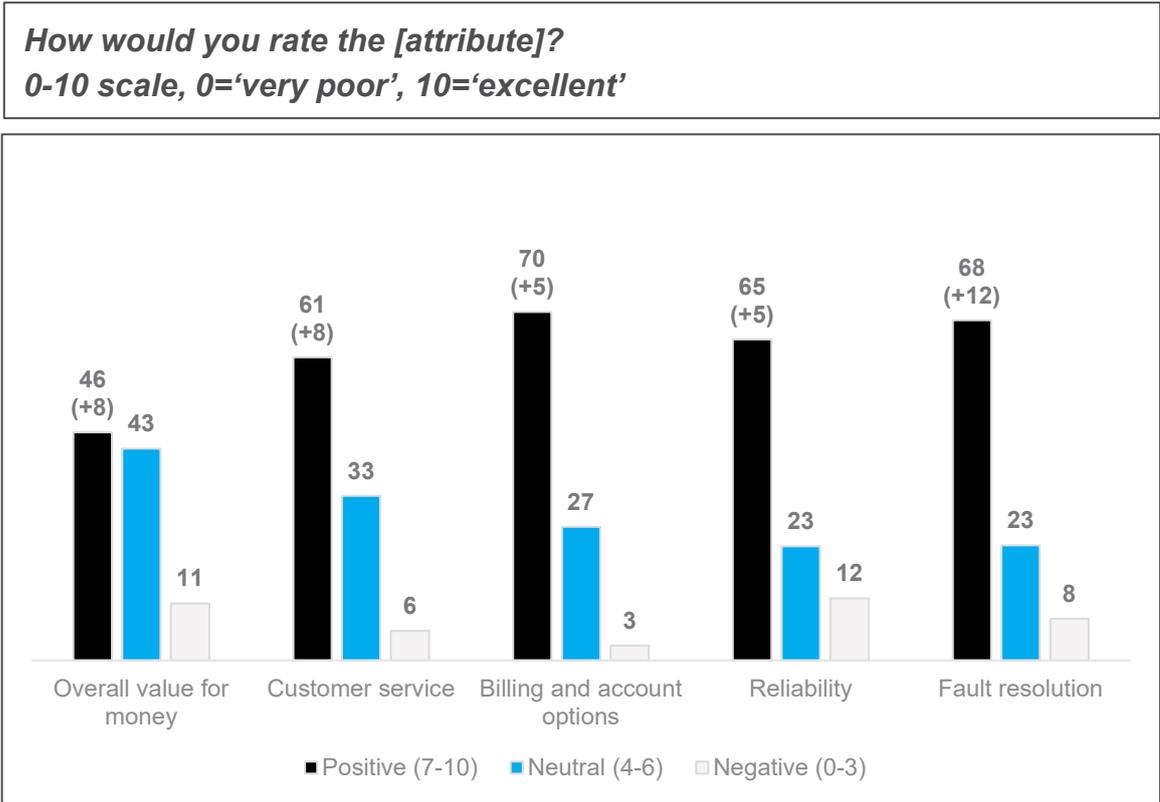


Satisfaction

Satisfaction with electricity

Satisfaction with all measures relating to electricity has increased.

- The largest increases in satisfaction were for fault resolution (up 12% to 68%), customer service (up 8% to 61%) and overall value for money (up 8% to 46%).



Base: Consumers in SA with electricity supply (n=305)

Base for fault resolution: Those in SA who had a power outage or rated 0 to 9 satisfaction with outage (n=203)

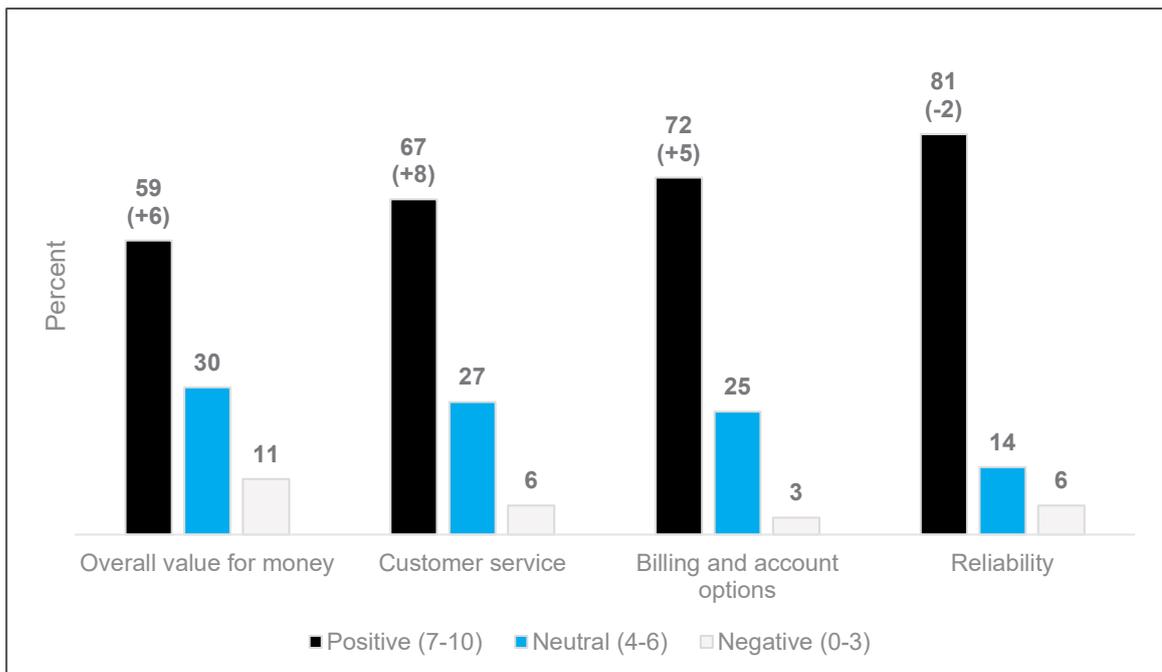


Satisfaction with gas

Satisfaction with gas services has generally increased.

- 59% of South Australian household consumers who have gas are satisfied with the overall value for money of their gas services, up 6% from June 2018.
- 67% are satisfied with the customer service of their gas services, up 8%.
- 72% are satisfied with their billing and account options, up 5%.
- 81% are satisfied with the reliability of their gas services, down 2%.

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



Base: South Australian gas consumers (n=206)

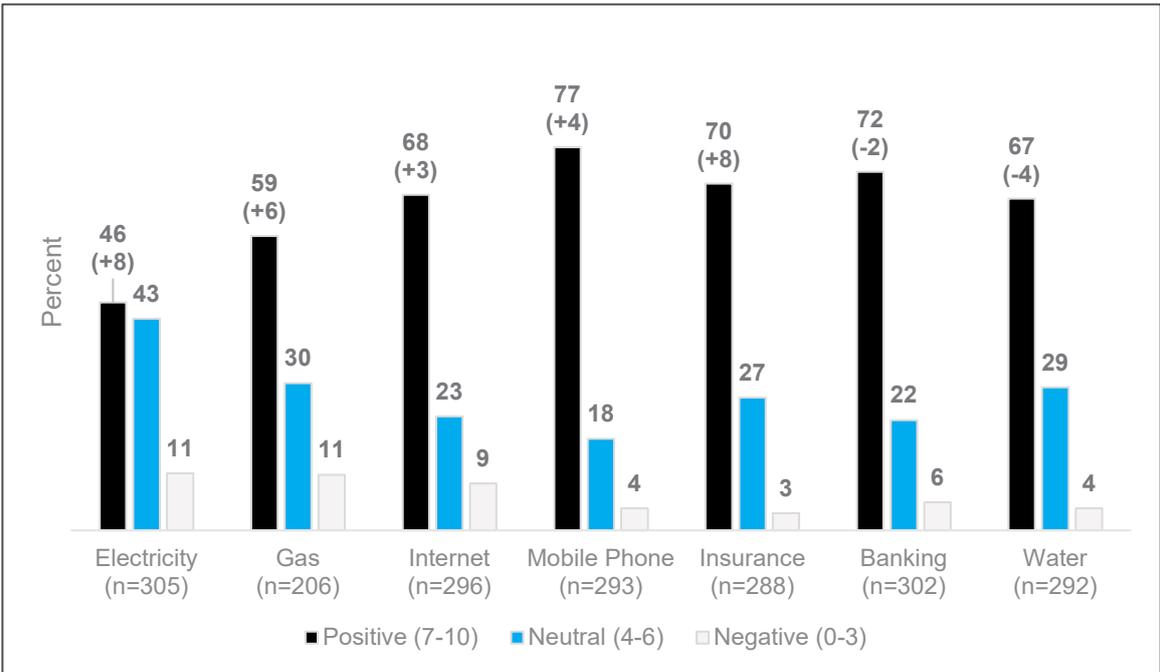


Satisfaction with utilities and services

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

- Consumer satisfaction with the value for money of their electricity services is up 8% to 46% while gas is up 6% to 59%.
- The highest level of satisfaction for comparable services is for mobile phone services (up 4% to 77%).

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



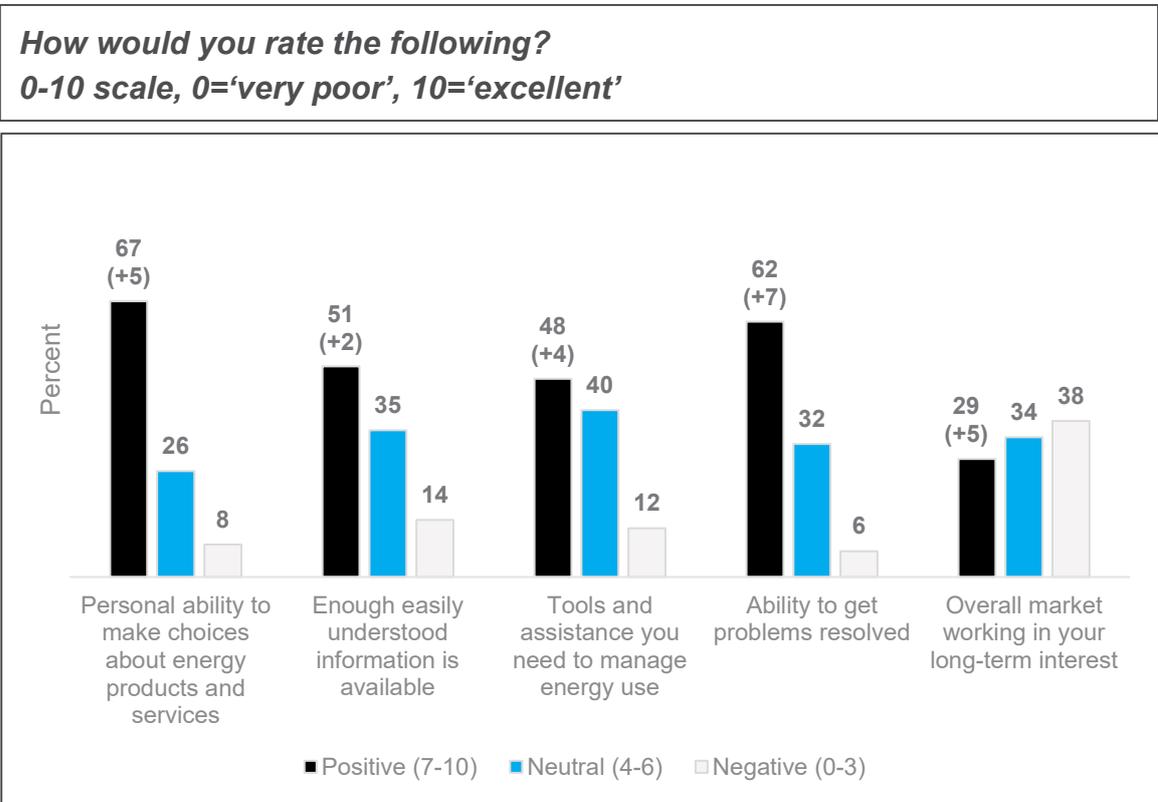
Base: Consumers in SA with each service



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 June 2018.

- Consumer confidence in their ability to make choices (67%) and resolve issues (62%) continues to be stronger than their trust in the information (51%) and tools (48%) available to support them.
- Overall confidence that the market is working in consumers’ interests is up from a low base (by 5% to 29%).



Base: Consumers in SA (n=305)



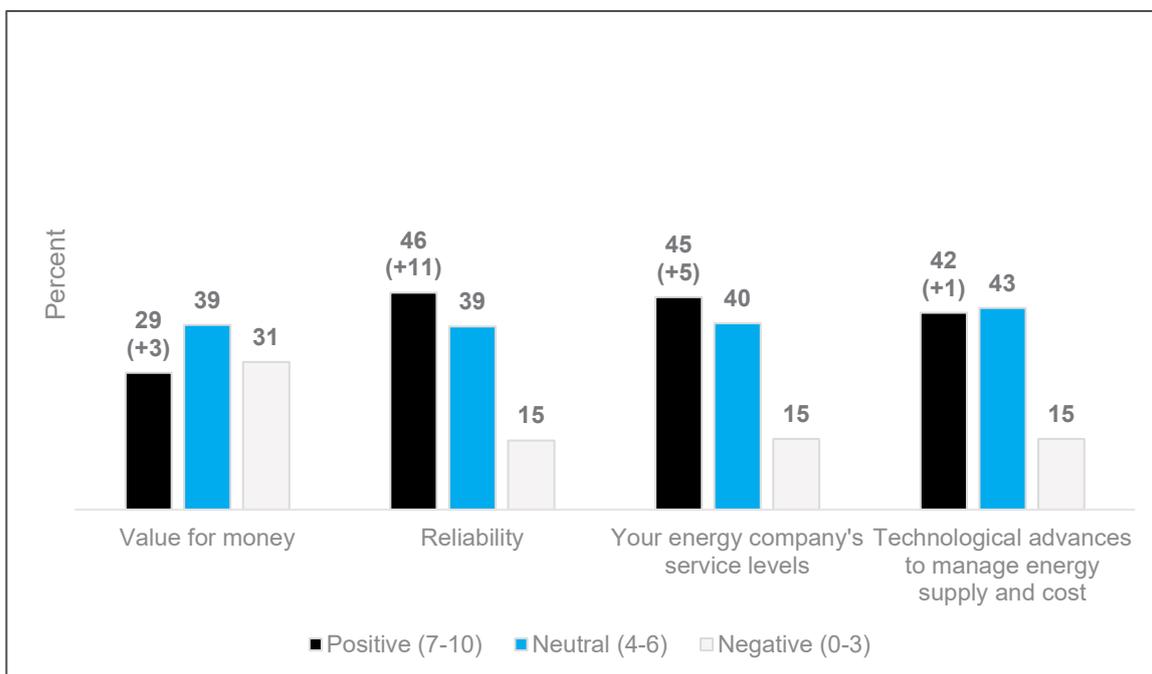
Confidence in long term outcomes

Confidence in South Australia that the market will deliver better long-term outcomes in the future has generally increased.

- There was a double-digit increase in confidence that reliability will improve (up 11% to 46%).
- Confidence that service levels will improve is up by 5% to 45%.
- Confidence that consumers will see better overall value for money in the future has increased by 3% (to 29%).
- Confidence in better technological advances in the future to manage energy supply and cost has increased marginally to 42%.

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

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

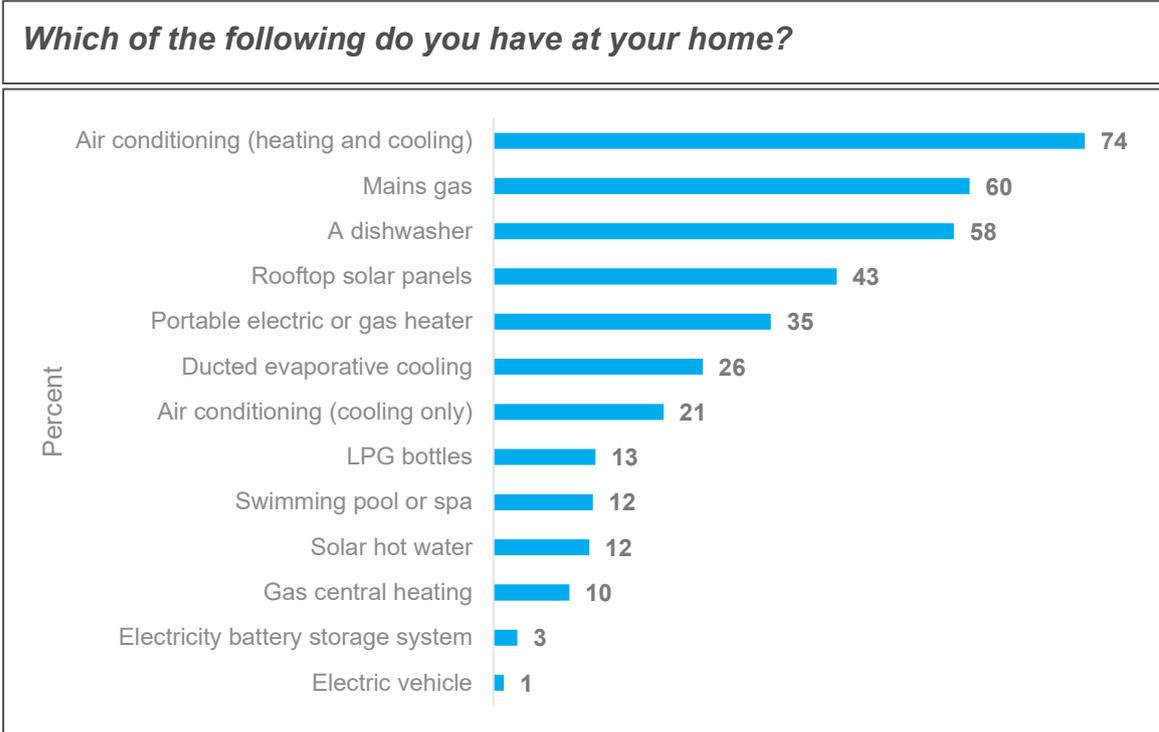


Base: Consumers in SA (n=305)

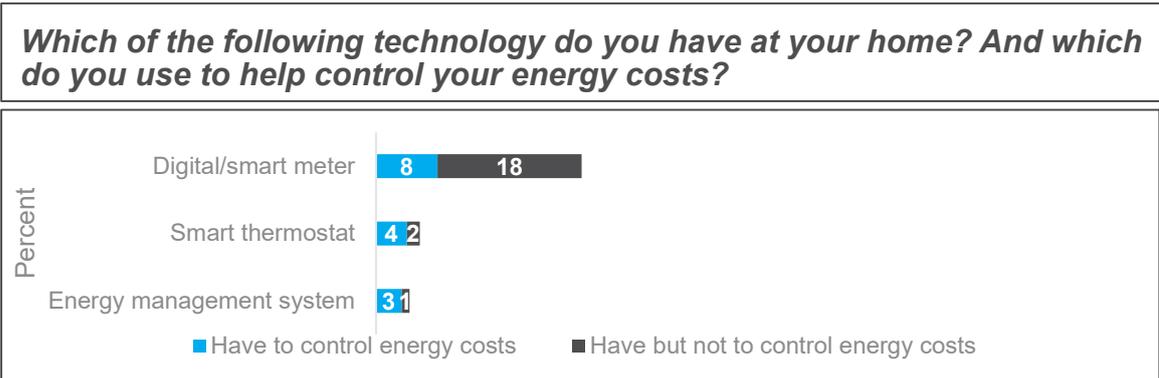


Use of technologies

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



Base: Consumers in SA (n=305)



Base: Consumers in SA (n=305)

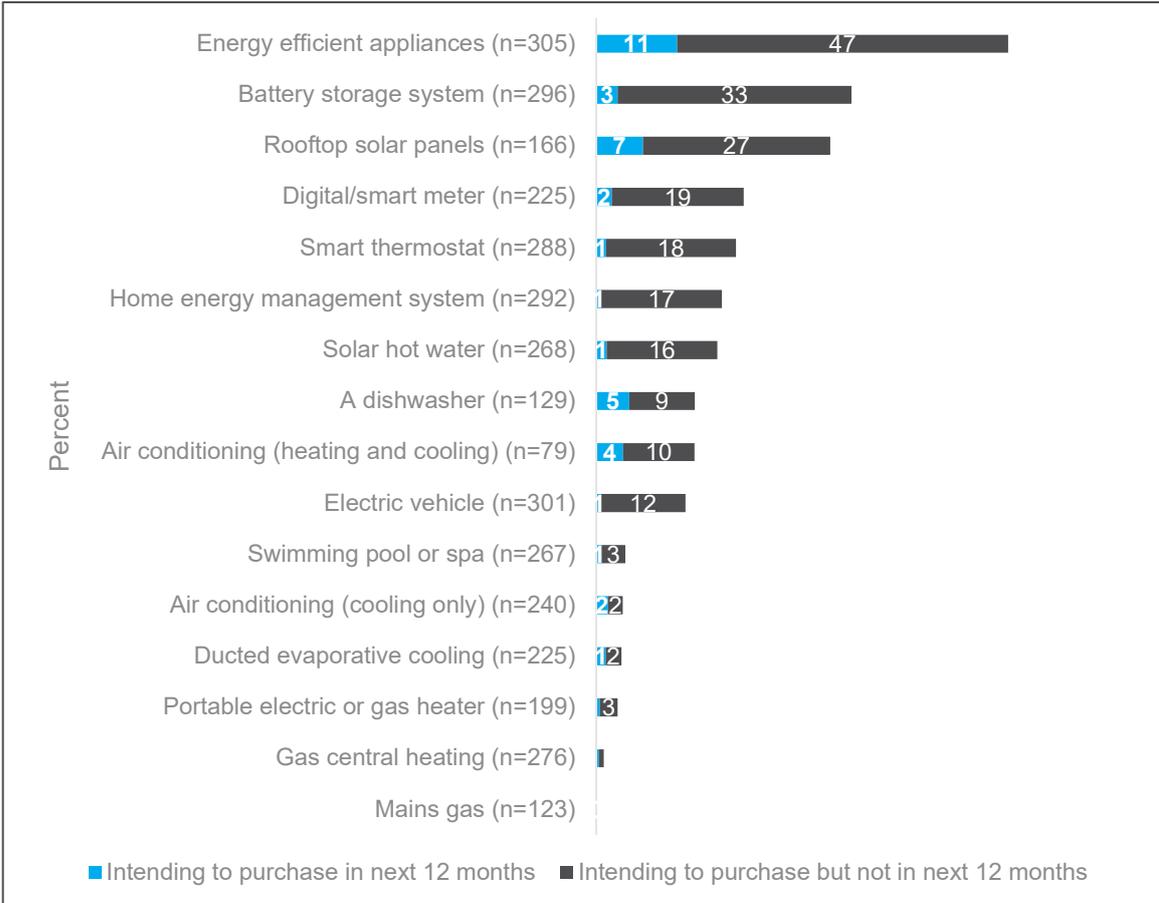


Uptake of technologies

More than a third of South Australian household consumers show interest in rooftop solar and battery storage.

- Of those households who reported having solar panels, 50% expressed interest in adding a battery storage system.
- 58% say they are considering more energy efficient appliances (11% plan to purchase some in the next 12 months).
- 36% of those who do not currently have a battery storage system are considering it (3% within the next year).
- 34% of those who do not have rooftop solar say they are considering solar panels (and 7% plan to do so in the next 12 months).

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



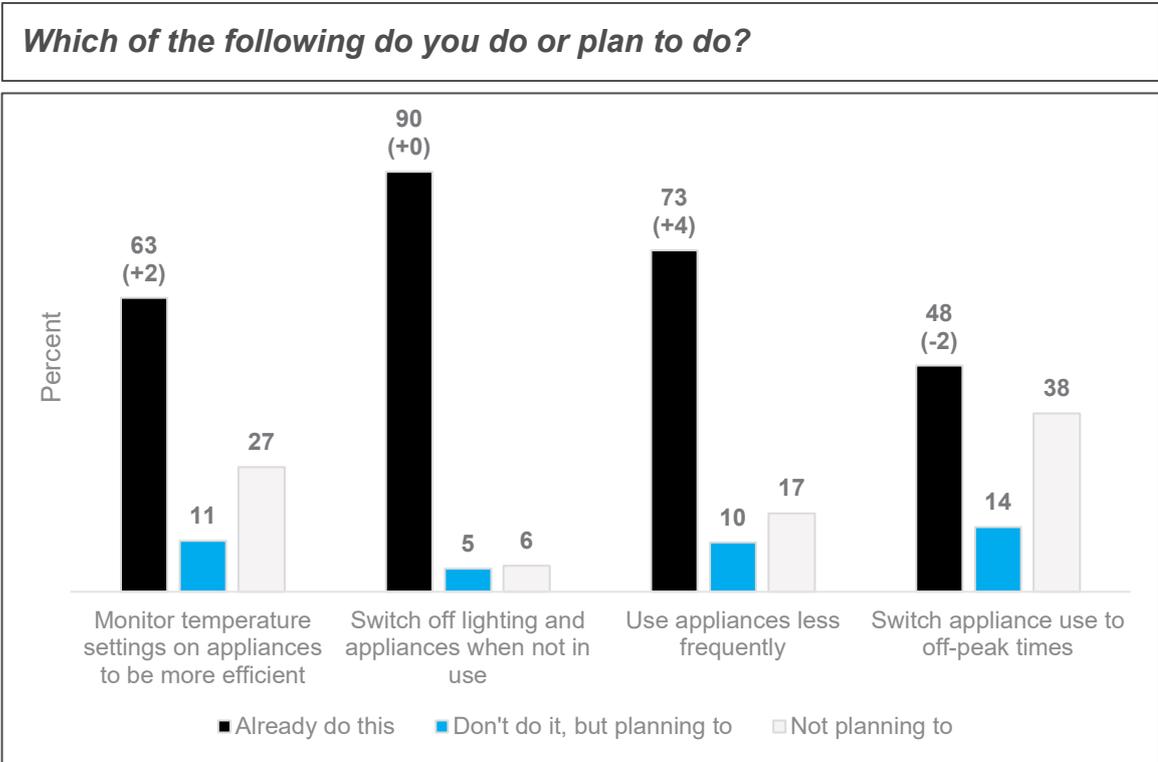
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in South Australia



Energy saving practices

South Australian household consumers are actively managing their energy use.

- 90% say they already switch off lighting and appliances when not in use, and 73% use appliances less frequently (up 4%).
- 63% say they monitor temperature settings on their appliances (up 2%).
- 48% say they have already switched appliance use to off-peak times (down 2%).



Base: Consumers in SA (n=305)

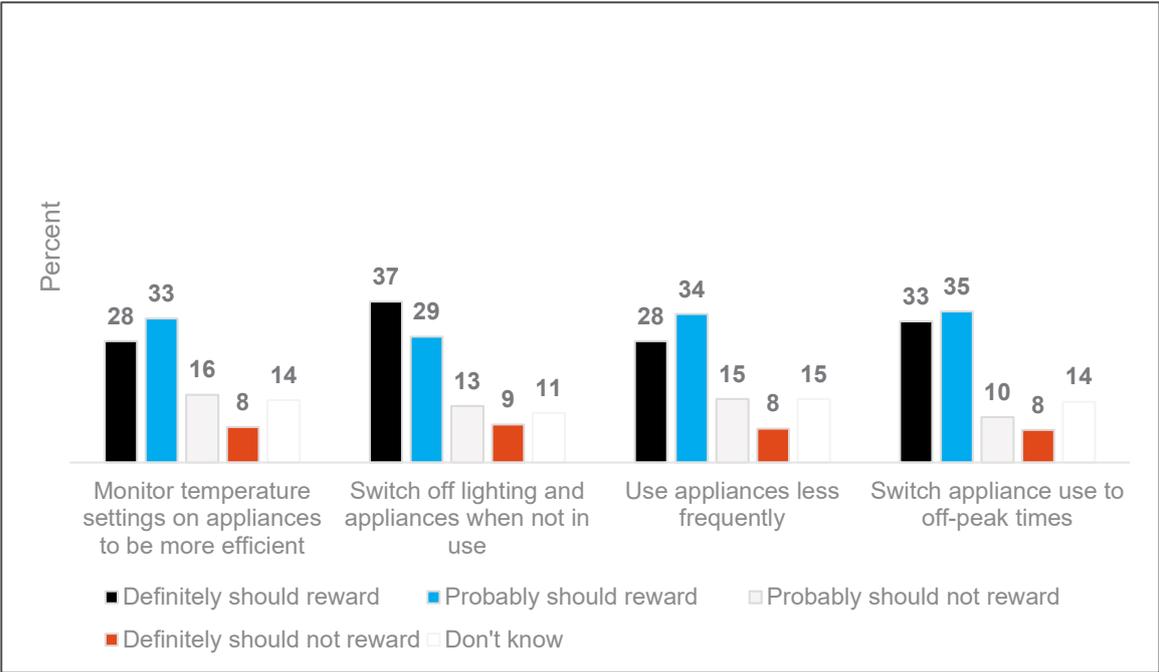


Reward for reducing energy use

The majority of South Australian household consumers think customers should be rewarded for reducing their energy usage.

- 68% 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.
- 62% 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:



Base: Consumers in SA (n=305)

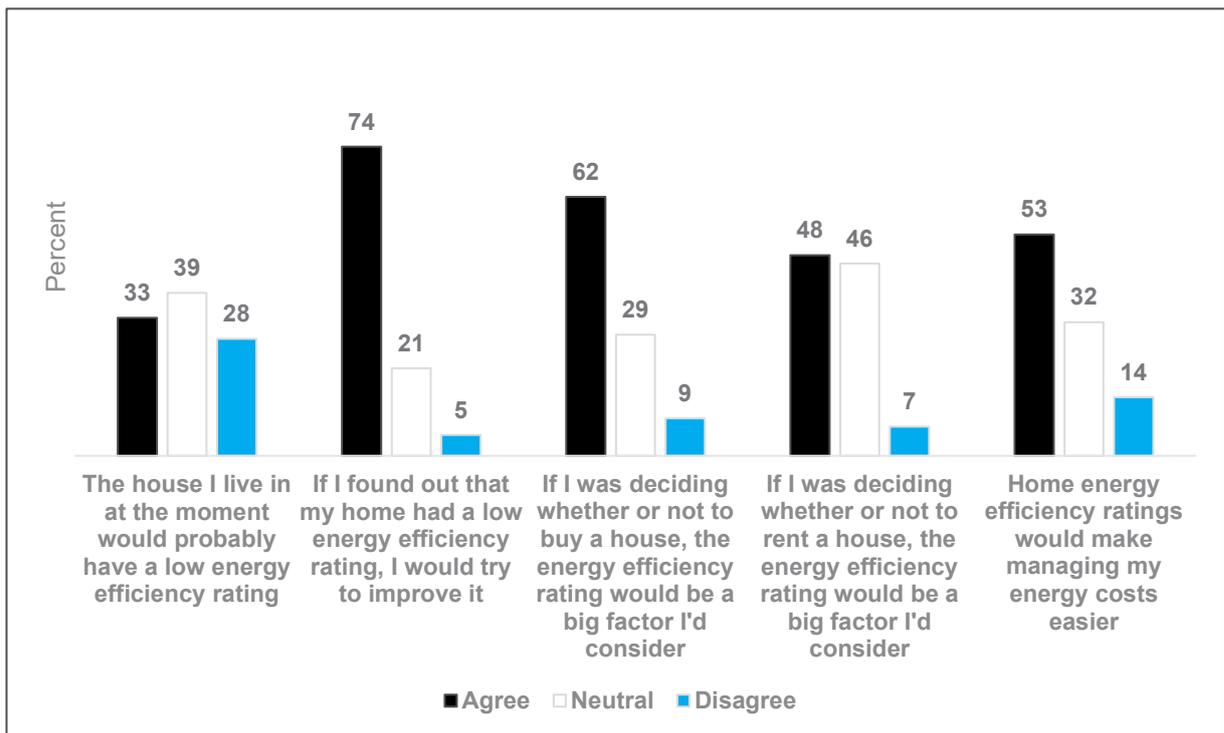


Housing energy efficiency

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

- 39% believe that their house would probably have a low energy efficiency rating, while 36% could not say whether their home was energy efficient.
- 74% said that an energy efficiency rating would be a big factor they would consider when buying a house.
- 48% said that a home energy efficiency rating would make managing their energy costs easier.
- 33% said they would try to improve their home’s energy rating if they found out it had a low rating.

Do you agree or disagree with the following?



Base for Statement 1, 3 & 5: Consumers in SA (n=305)
 Base for Statement 2: Home-owners in SA (n=241)
 Base for Statement 4: Renters in SA (n=61)

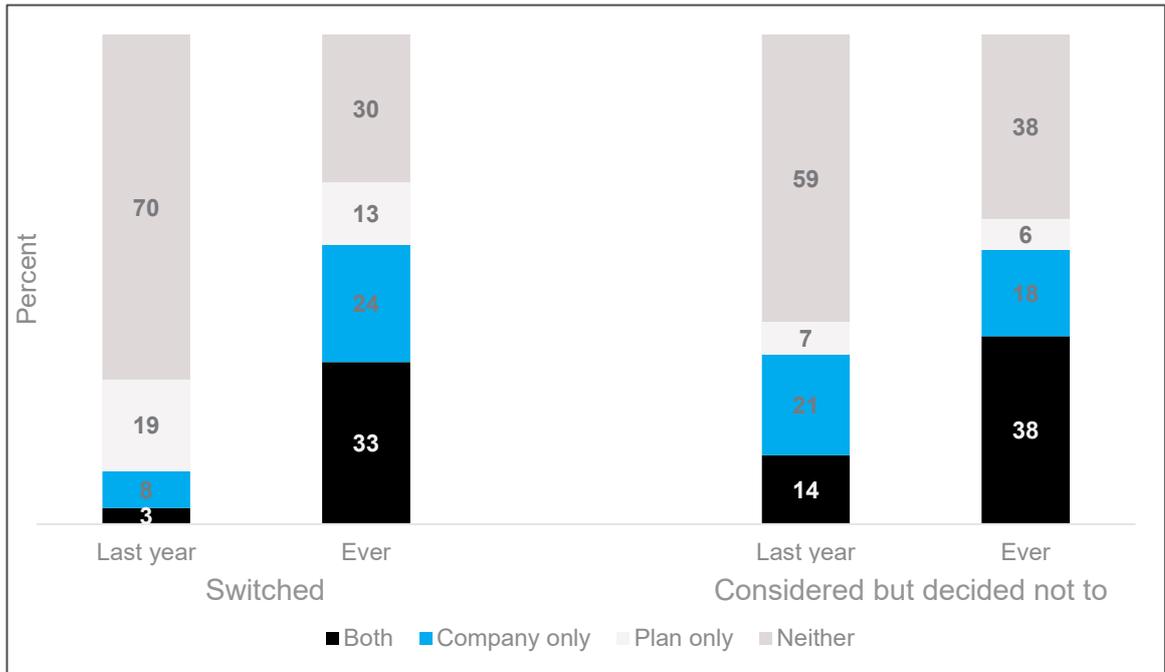


Switching behaviour

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

- 30% report switching in the past year while another 42% said they considered switching in the past year but decided not to.
- 30% say they have never switched energy companies or plans.

Which of the following have you done?



Base: Consumers in SA (n=305)



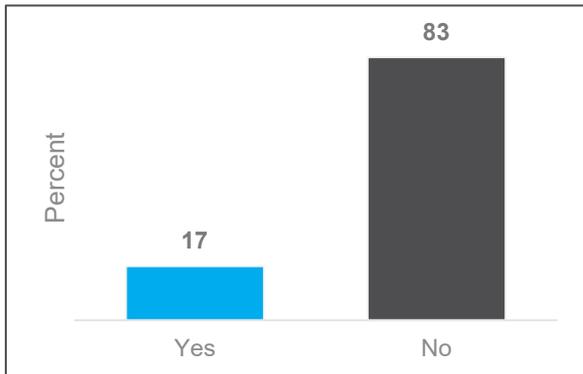
Activity

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.

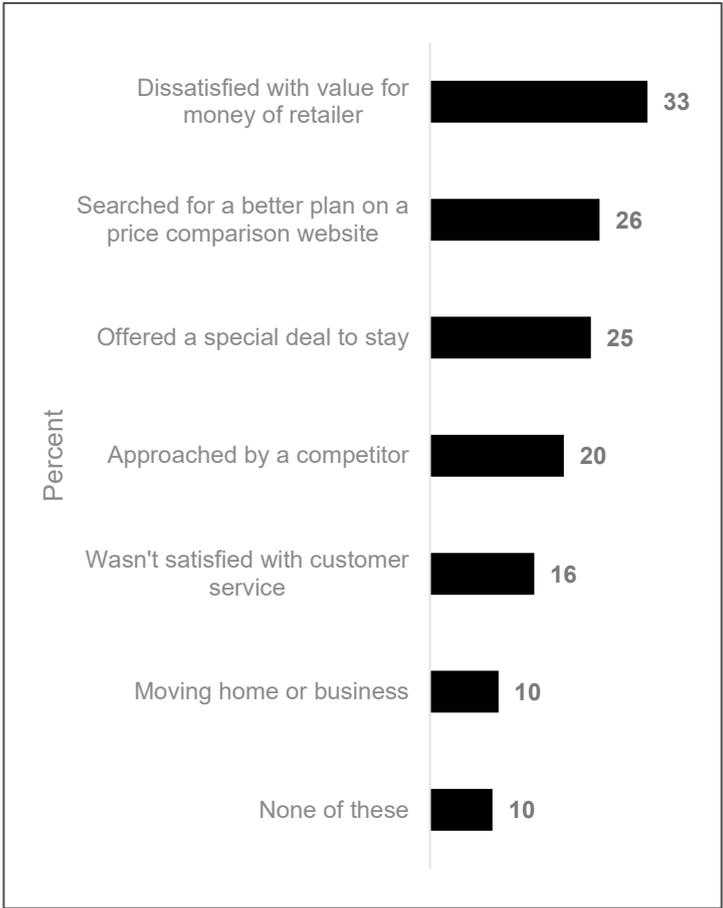
- 33% of those who switched companies in the last 3 years said they weren't satisfied with the value for money of the service provided by their supplier.
- 26% said they looked at a price comparison website the last time they considered switching.
- 17% plan to switch energy companies or plans in the next year.

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



Base: Consumers in SA (n=305)

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



Base: Consumers in SA who have switched or looked at switching in the past (n=220)

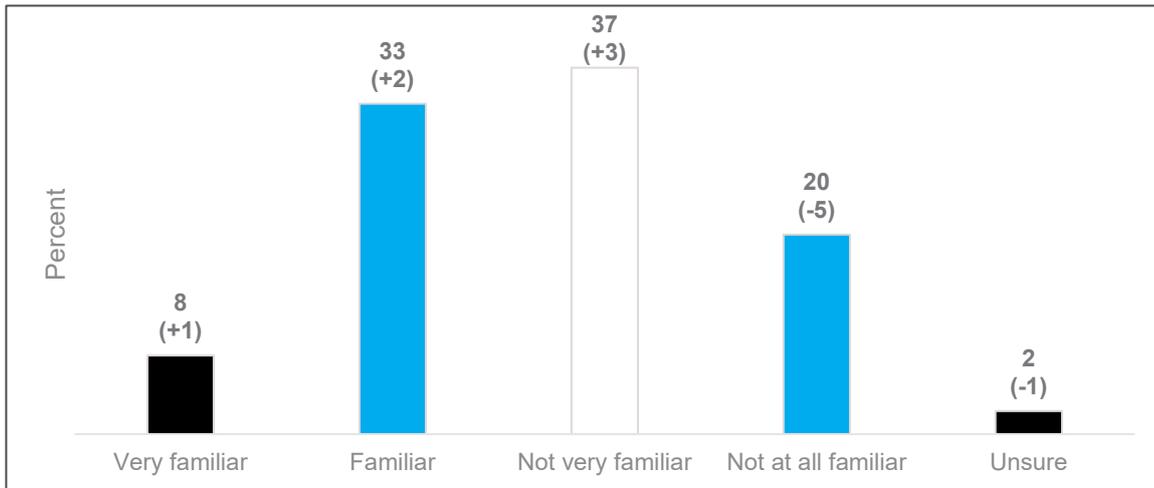


Other

Awareness of the Energy Ombudsman

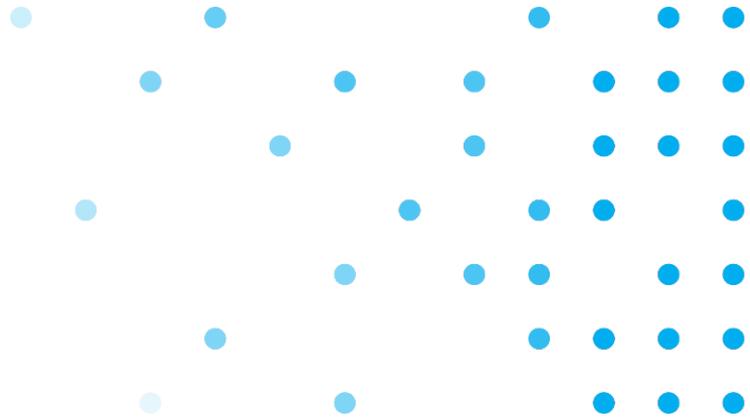
41% say they are very familiar or familiar with the Energy Ombudsman.

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



Base: Consumers in SA (n=305)

Tasmania





Overall satisfaction

The overall satisfaction with electricity services has increased slightly among Tasmanian household consumers since the last survey.

- 67% say they are satisfied, up 3% from June 2018.

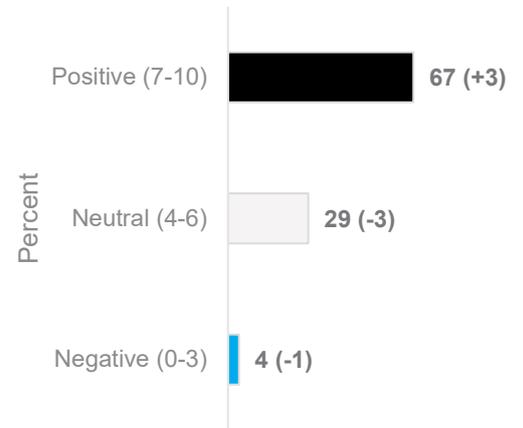
Satisfaction with levels of competition in Tasmania increase from a low level.

- 11% say they are satisfied, up 2% from.

Satisfaction

Overall Satisfaction

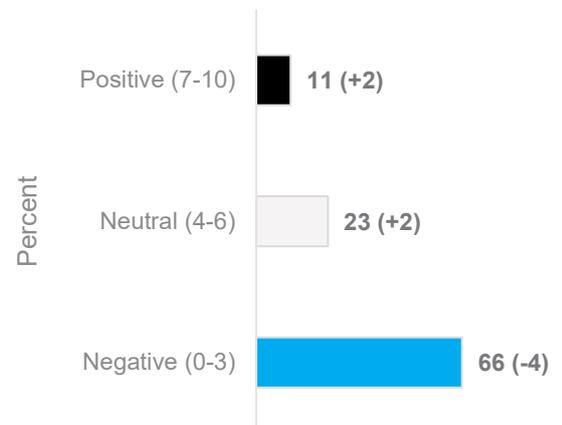
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Base: Tasmania consumers (n=200)

Satisfaction with competition

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



Base: Tasmania consumers (n=200)

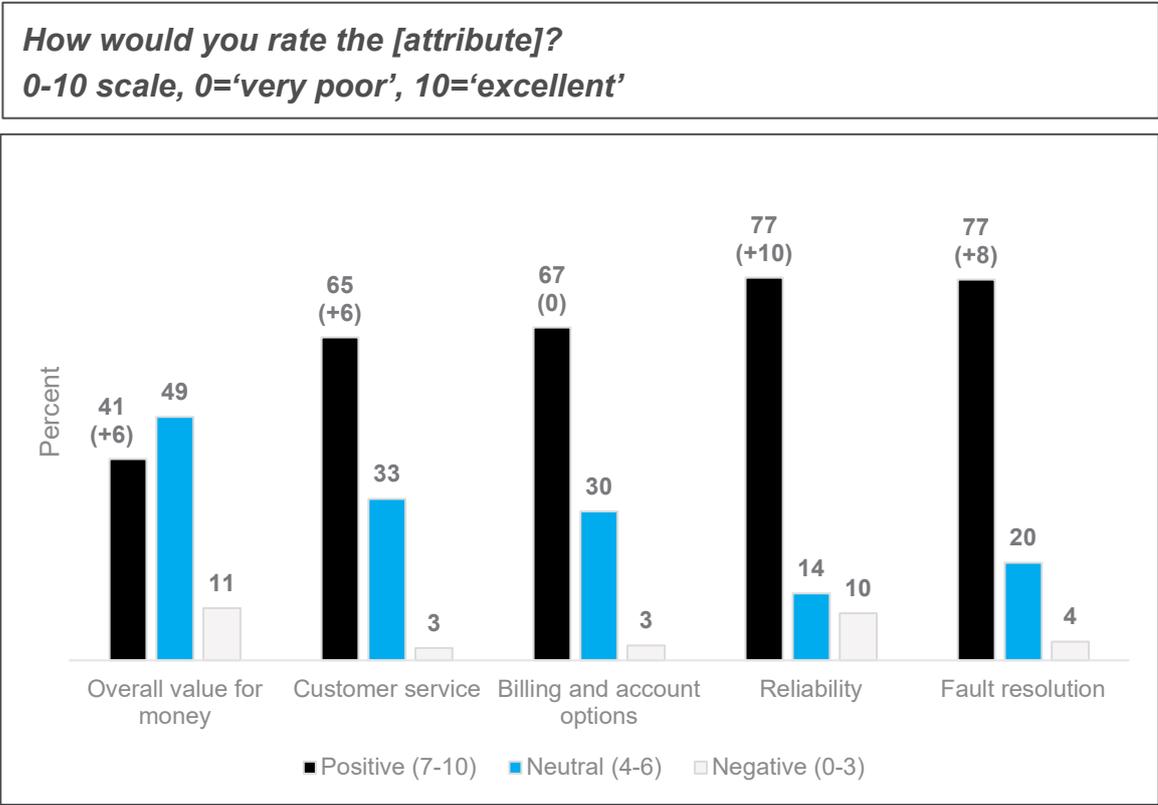


Satisfaction

Satisfaction with electricity

Satisfaction with electricity has risen across most measures in Tasmania.

- Satisfaction with reliability of electricity supply is up 10% to 77%
- Satisfaction with fault resolution is up 8% to 77%.
- 65% of Tasmanian household consumers are satisfied with the customer service they receive (up 6%).
- Satisfaction with the available billing and account options is unchanged at 67%.
- Satisfaction with value for money outcomes has increased 6% to 41%.



Base: Consumers in TAS with electricity supply (n=200)
Base for fault resolution: Those in TAS who had a power outage or rated 0 to 9 satisfaction with outage (n=107)



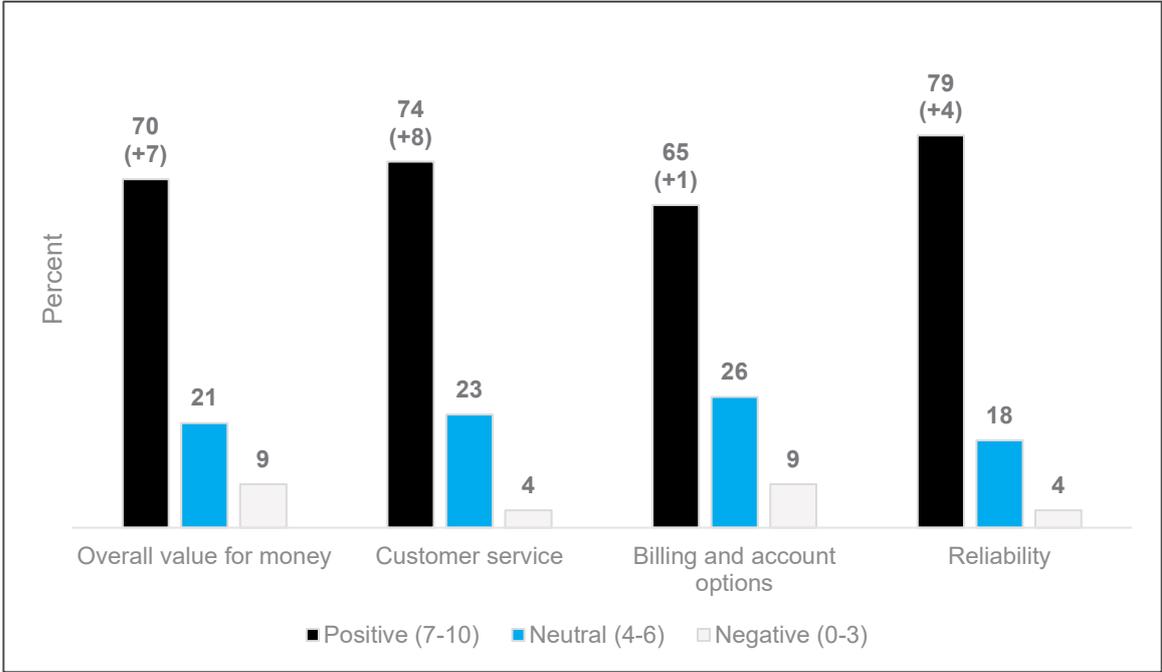
Satisfaction

Satisfaction with gas

Tasmanian household gas consumers are more satisfied across all measures.

- 74% are now satisfied with their customer service, up 8%.
- 70% are now satisfied with the overall value for money provided by their gas service provider, up 7%.
- 79% are now satisfied with the reliability of their gas services, up 4%.
- 65% are now satisfied with the available billing and account options, up marginally.

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



Base: Consumers in TAS with gas supply (n=57)
Note: Small sample size – results are indicative only



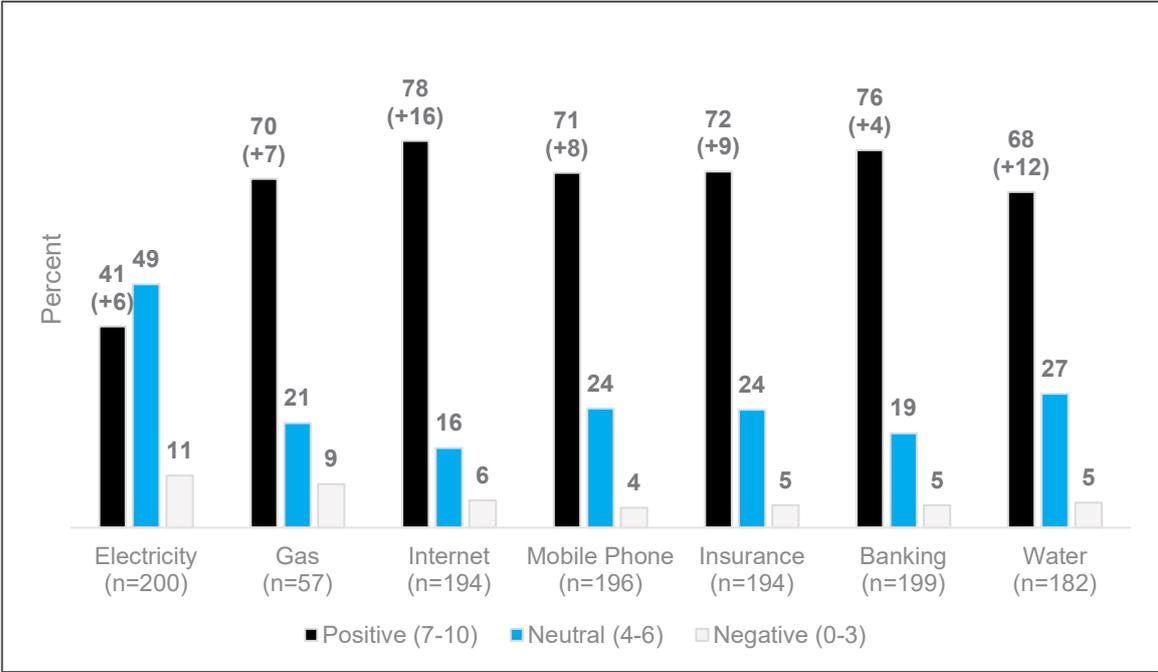
Satisfaction

Satisfaction with utilities and services

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

- While gas is among the utilities with relatively high satisfaction levels, electricity is still considerably behind other utilities in terms of value for money (at 41%).
- Satisfaction with the value for money of internet and water are both up sharply.

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



Base: Consumers in TAS with each service



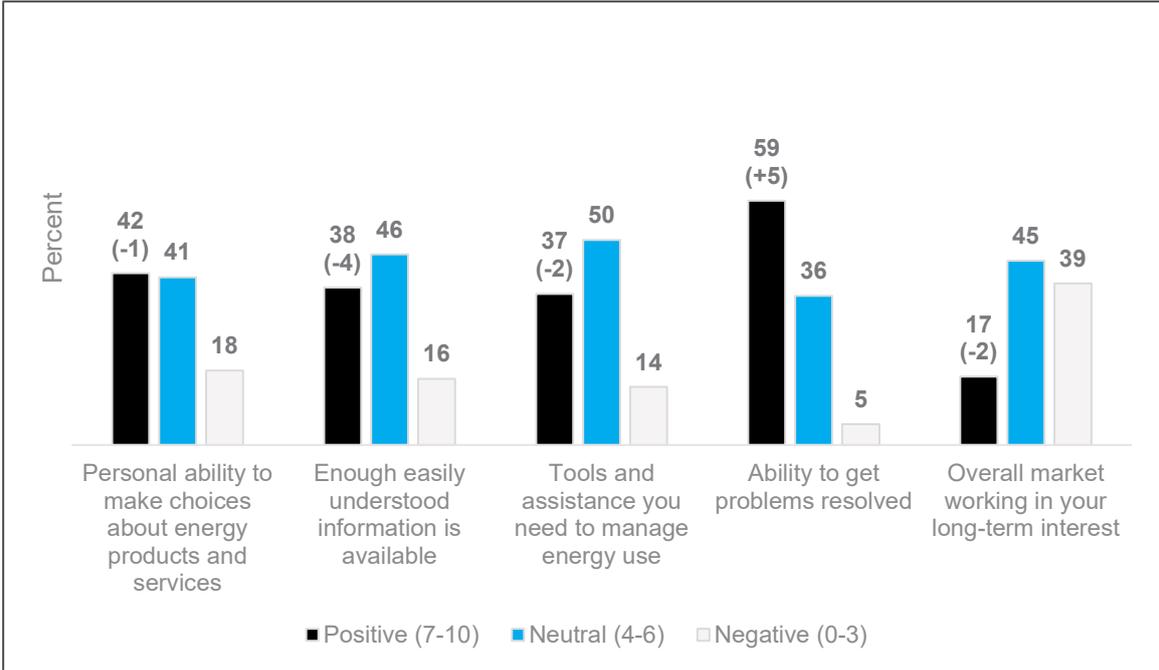
Confidence

Confidence in information, tools and working market

Confidence that the market is working in the consumers’ interest remains low.

- Confidence the market is working in consumers’ long-term interest has reduced further to 17% among Tasmanian households.
- Consumers’ confidence in their personal ability to get problems resolved is up 5% to 59%; and confidence in their ability to make choices about energy products and services is at 42%.
- Consumer confidence that there is enough easily understood information (38%) and tools (37%) to help them is comparably low.

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



Base: Consumers in TAS (n=200)



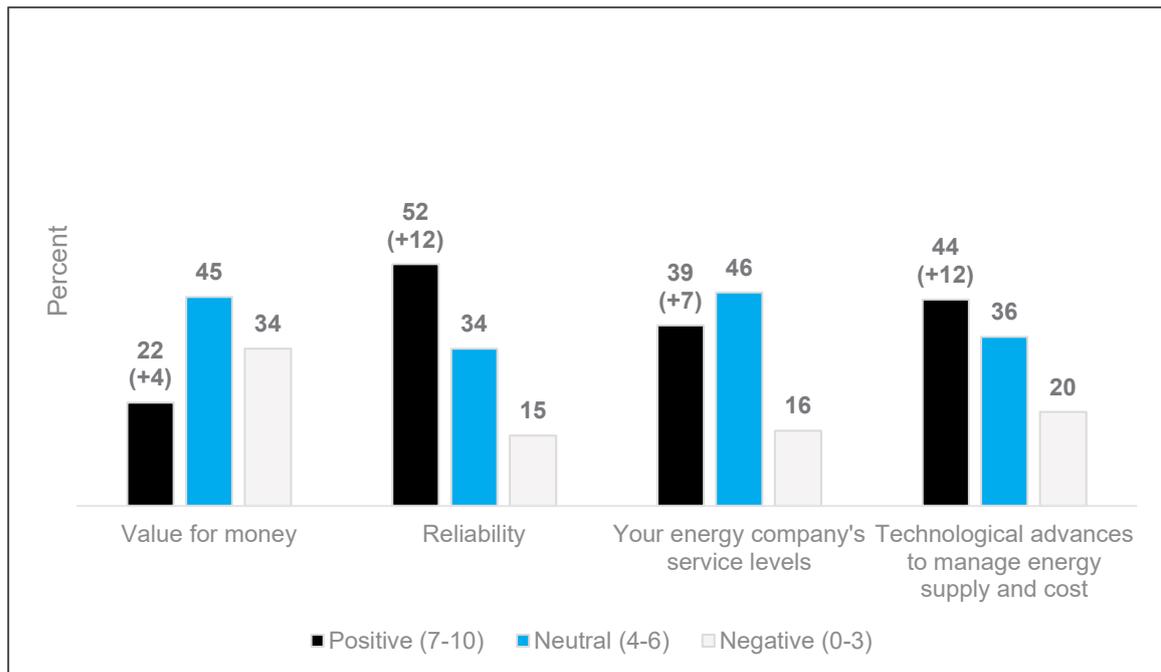
Confidence in long term outcomes

Despite low confidence that the market is working in consumers' interests, confidence that market outcomes will improve in the future has increased.

- 52% are now confident that the market will deliver greater reliability (up 12%), and 44% are confident that the market will deliver technological advances to manage energy supply and cost (also up 12%).
- Consumer confidence the market will deliver better value for money outcomes in the future is comparably low (up 4% to 22%).

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

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



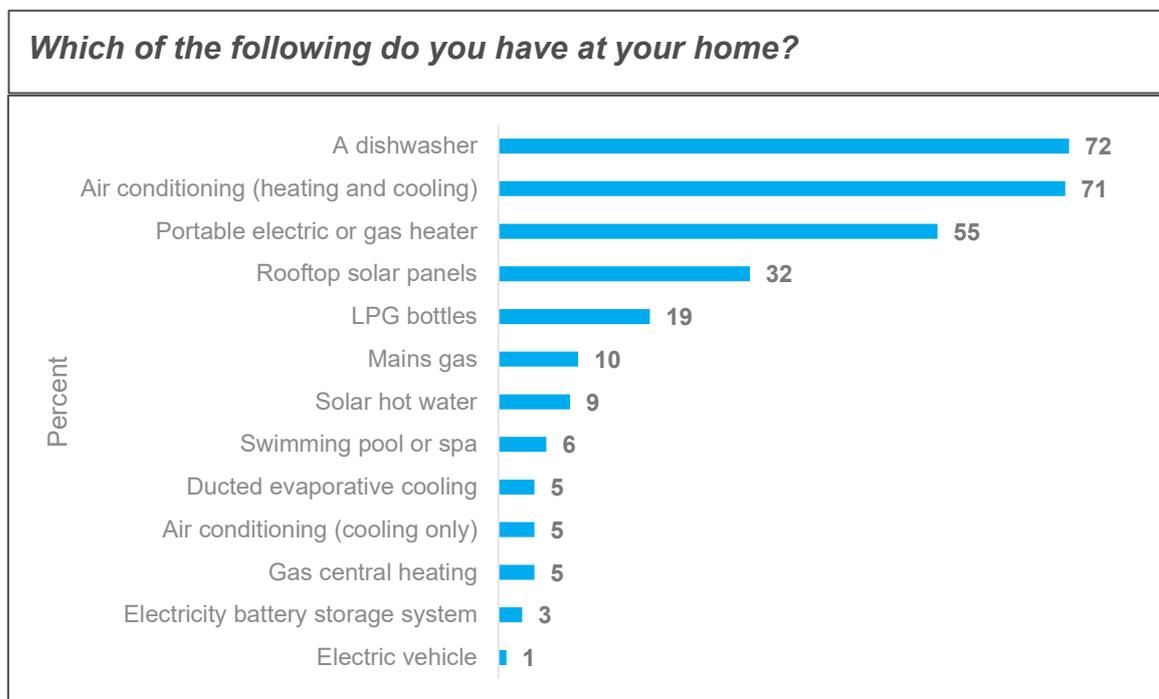
Base: Consumers in TAS (n=200)



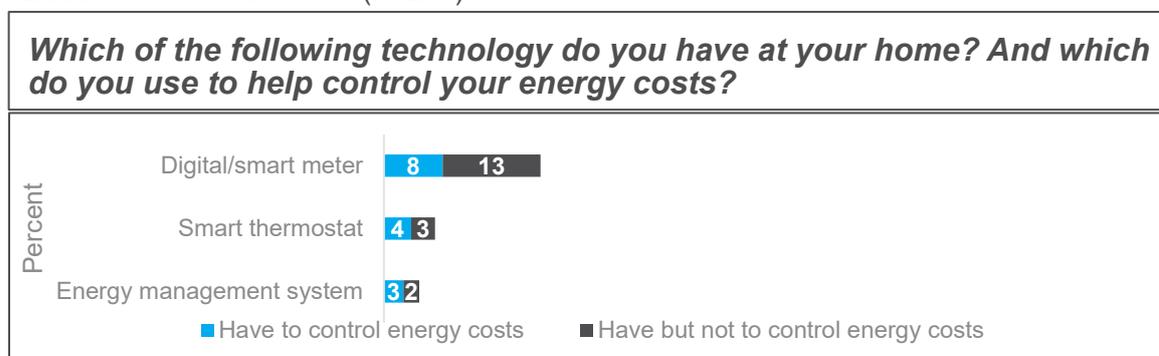
Use of technologies

Probably reflecting the low proportion with gas central heating, Tasmanian household consumers are particularly likely to report having a portable electric or gas heater

- Only 5% have gas central heating, and 55% say they have a portable heater.
- 71% say that they have air conditioning that they use for both heating and cooling (behind only South Australia).
- 21% say they have a smart/digital meter but only 8% say they use it to control their energy use and costs.



Base: Consumers in TAS (n=200)



Base: Consumers in TAS (n=200)

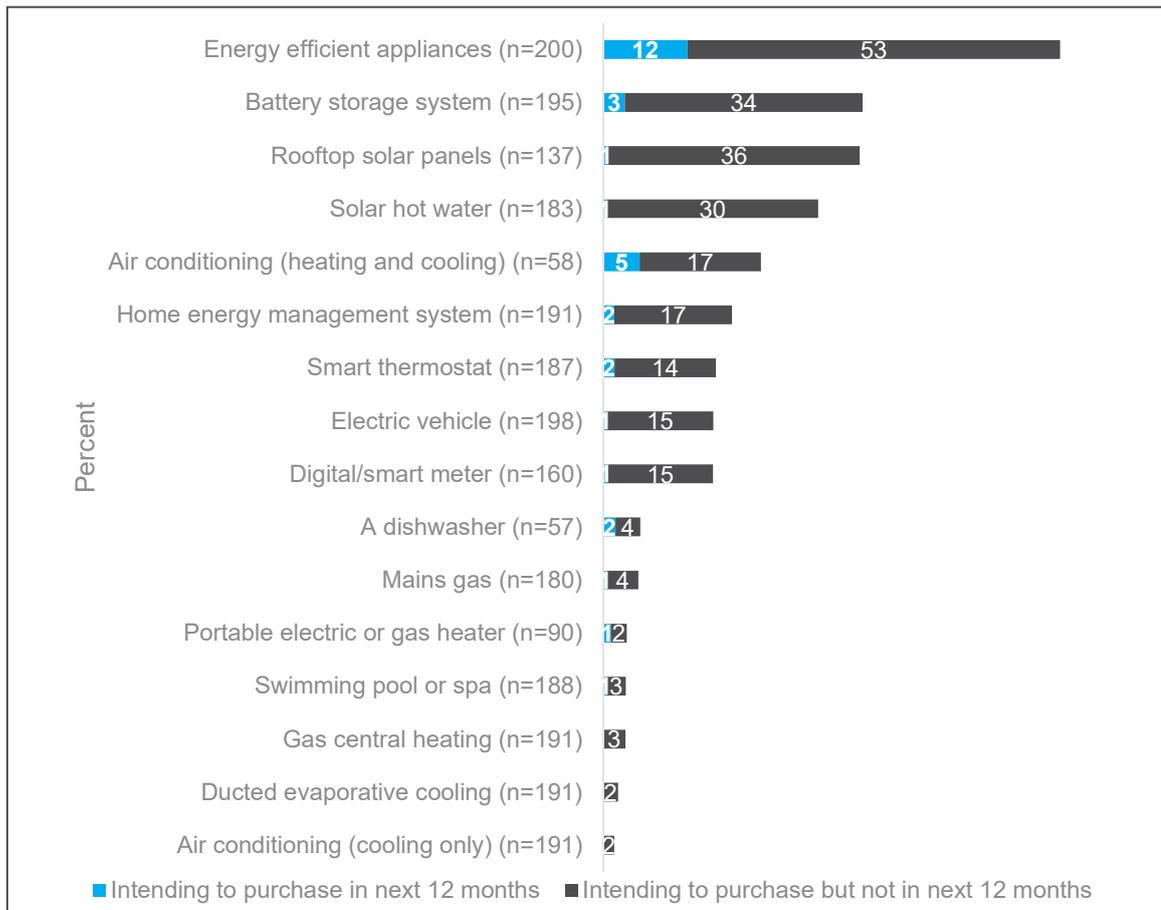


Uptake of technologies

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

- Of those households who reported having solar panels, 67% expressed interest in adding a battery storage system.
- Just 1% say that they are intending to install rooftop solar in the year ahead (the lowest of any state or territory), but 36% say that they are considering it beyond that time period (the second highest for all states and territories, behind ACT).
- Tasmanian household consumers are also the most likely to say that they are considering solar hot water.

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



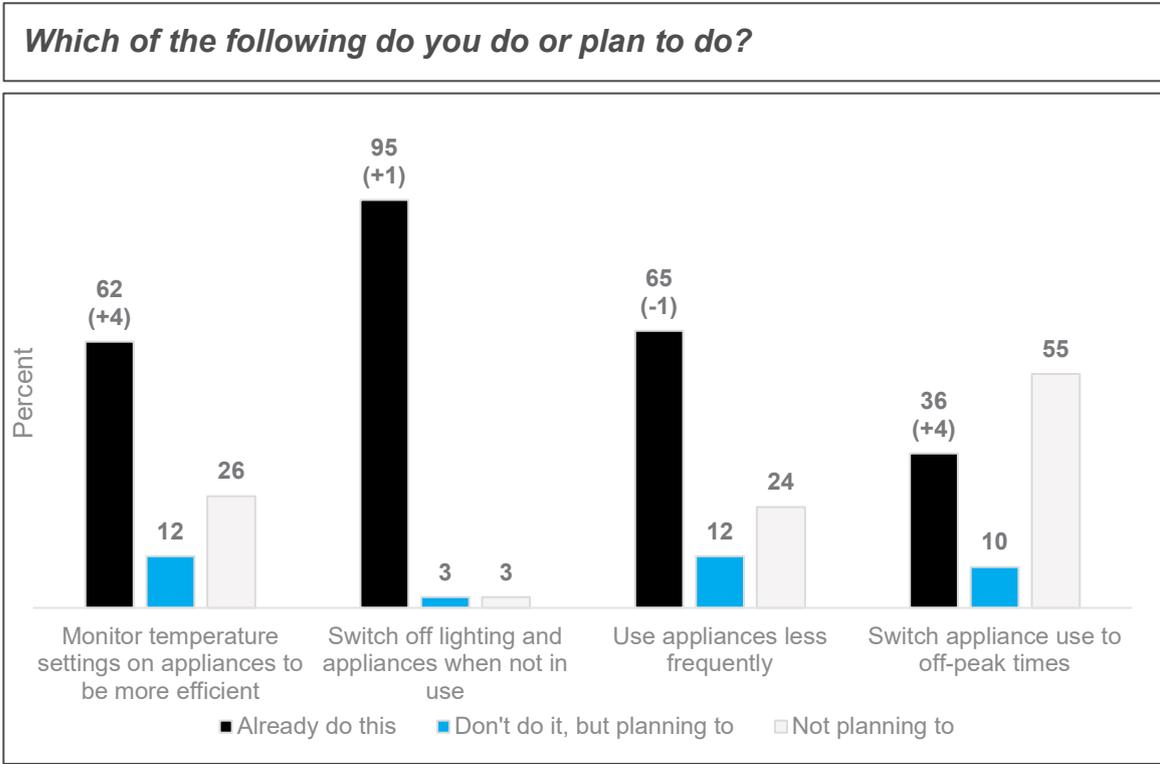
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Tasmania.



Energy saving practices

Tasmanian household consumers are already actively managing their energy use.

- 95% say they switch off lighting and appliances when not in use (up 1%).
- 65% say they use appliances less frequently (down 1%).
- 62% say they monitor the temperature settings on appliances (up 4%).
- 36% say they already switch their use of appliances to off-peak times (up 4%).



Base: Consumers in TAS (n=200)

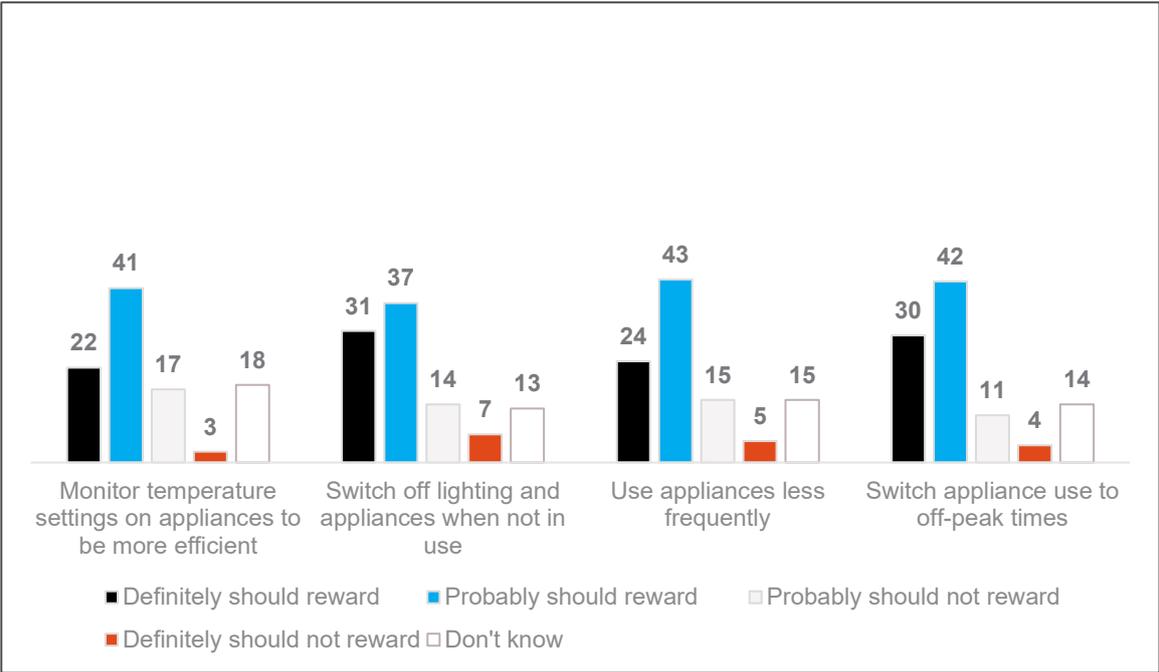


Reward for reducing energy use

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 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.
- 63% 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:



Base: Consumers in TAS (n=200)

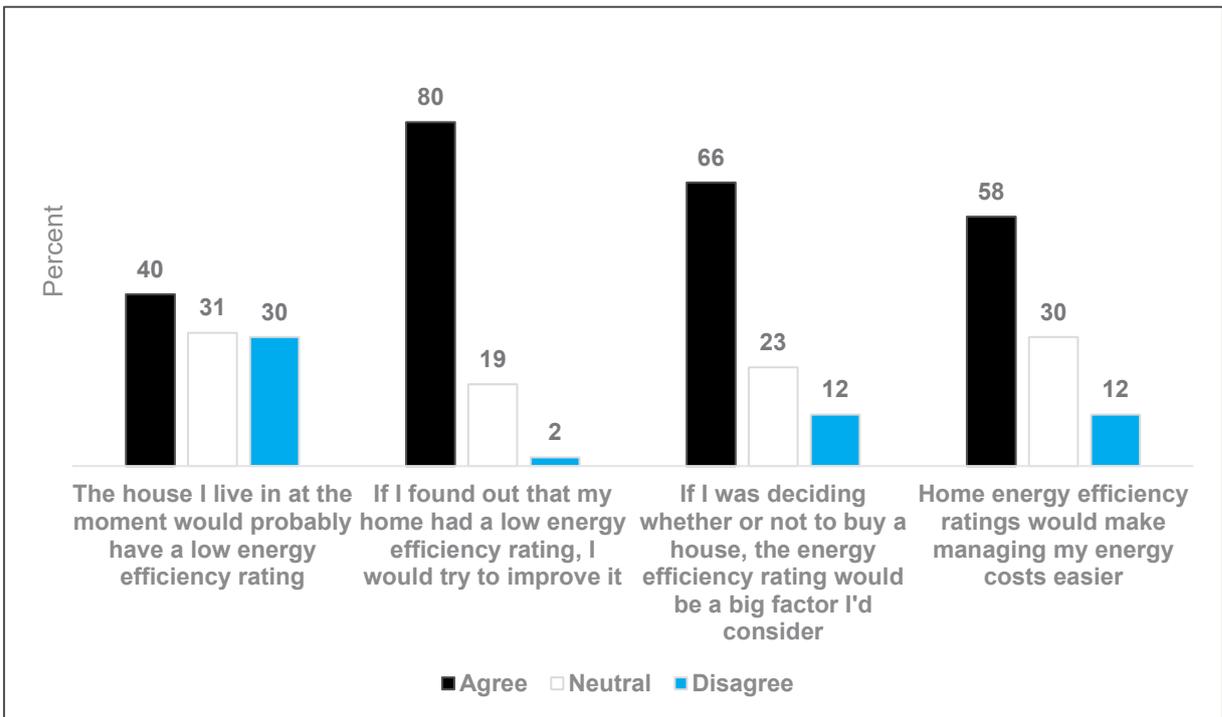


Housing energy efficiency

A relatively high proportion of Tasmanian household consumers believe that the house they live in at the moment would probably have a low energy rating, and there is strong declared interest in improving their energy efficiency if it was indeed shown to be low.

- 40% of Tasmanians think that the house they live in at the moment would probably have a low energy rating, the most in any state. Only 30% categorically disagreed with the statement that their home would probably have a low energy efficiency rating.
- 80% said they would try to improve their home’s energy efficiency rating if they found out it had a low rating.
- 66% said that an energy efficiency rating would be a big factor they would consider when buying a house.

Do you agree or disagree with the following?



Base for Statement 1, 3 & 4: Consumers in TAS (n=200)

Base for Statement 2: Home-owners in TAS (n=176)

Note: The data for energy efficiency as a factor in TAS renters’ decisions has been left out as sample size is too small

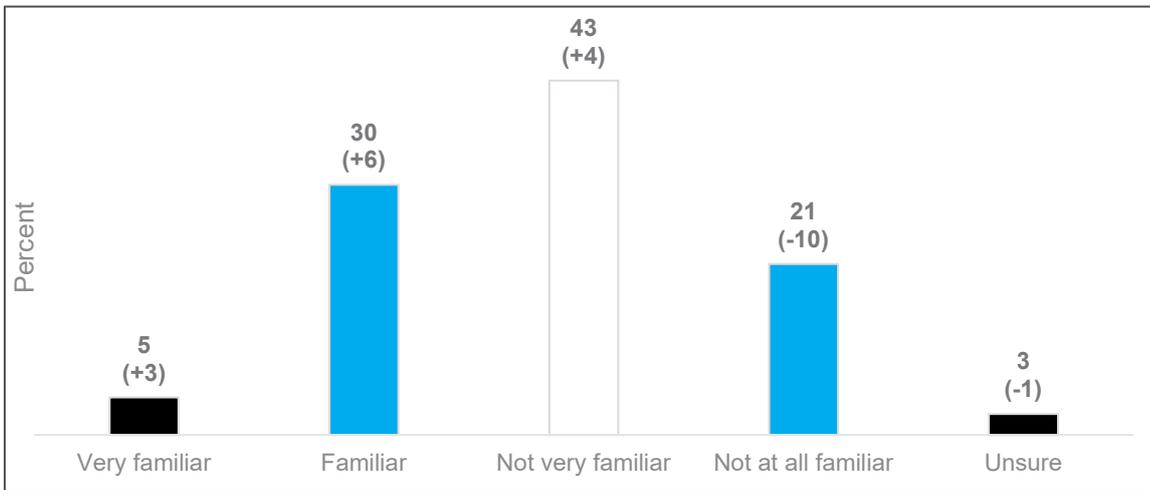


Other

Awareness of the Energy Ombudsman

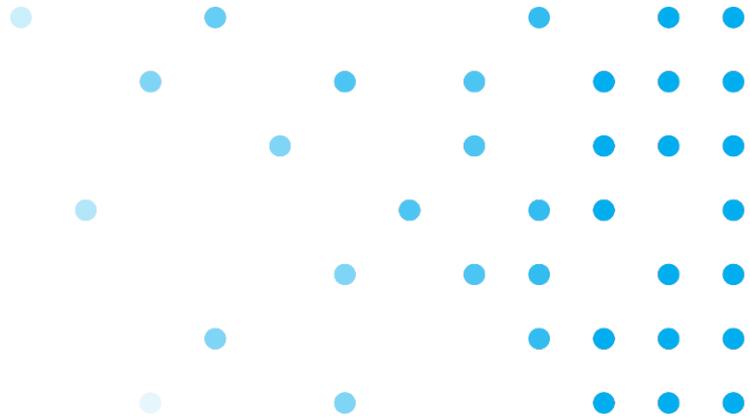
35% of Tasmanian households say that they are very familiar or familiar with the Energy Ombudsman.

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



Base: Consumers in TAS (n=200)

Australian Capital Territory





Overall satisfaction

Satisfaction with electricity and gas services amongst household consumers in the ACT has remained unchanged since June 2018.

- 69% say they are satisfied.

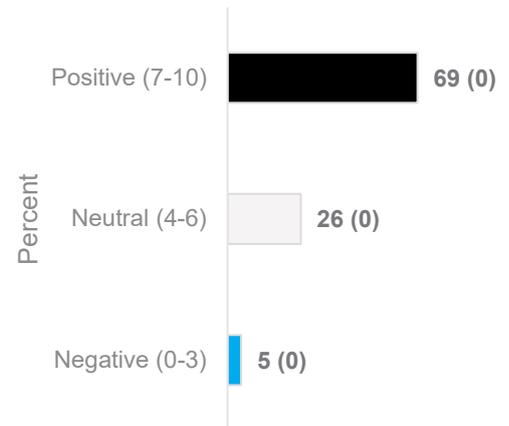
Satisfaction with the levels of competition has however increased.

- 28% of ACT household consumers now say they are satisfied, up 8% since.

Satisfaction

Overall Satisfaction

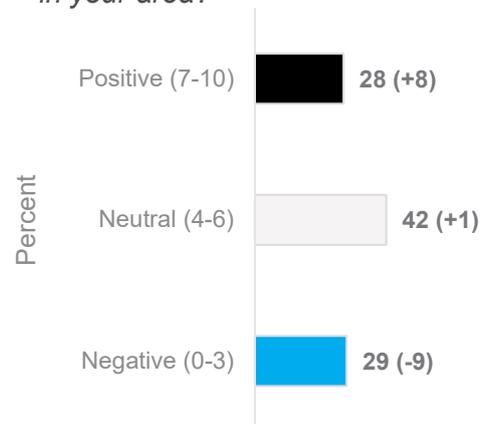
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Base: Consumers in ACT (n=204)

Satisfaction with competition

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



Base: Consumers in ACT (n=204)



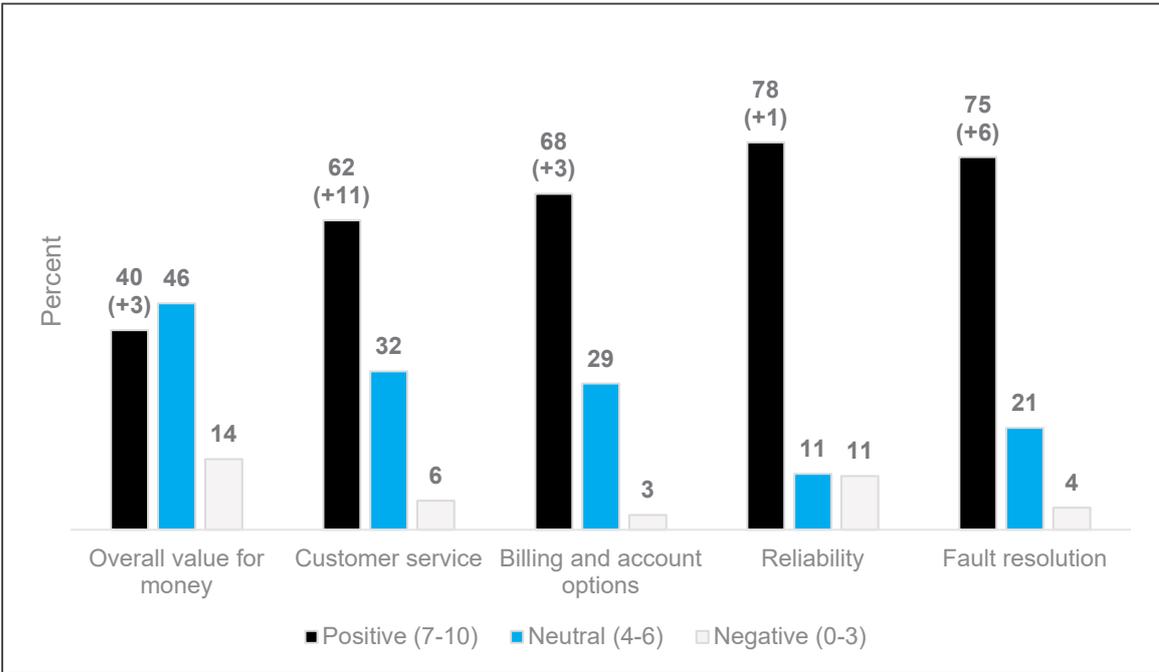
Satisfaction

Satisfaction with electricity

Satisfaction has increased for all measures relating to electricity.

- The largest increases were for customer service (up 11% to 62%) and fault resolution (up 6% to 75%).
- Overall satisfaction with value for money is up 3% to 40%.

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



Base: ACT electricity consumers (n=204)

Base for fault resolution: Those who had a power outage or rated 0 to 9 satisfaction with outage in ACT (n=112)



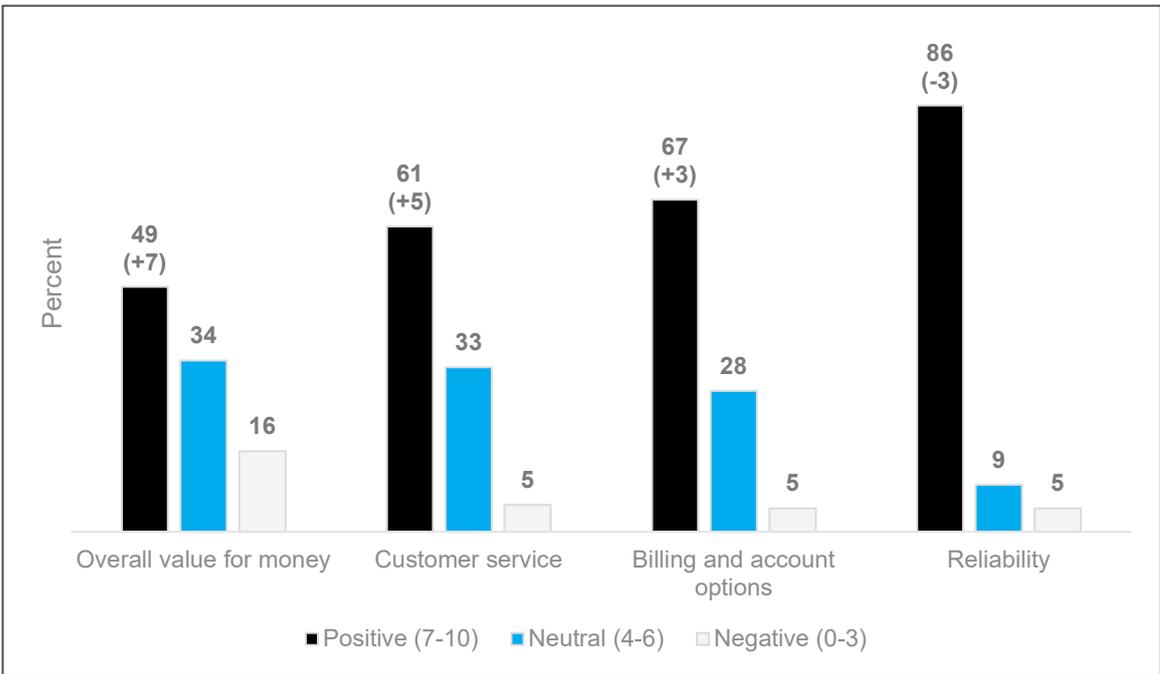
Satisfaction

Satisfaction with gas

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

- Satisfaction with overall value for money increased 7% to 49%.
- Satisfaction with customer service is up 5% to 61%.

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



Base: Consumers in ACT with gas supply (n=148)



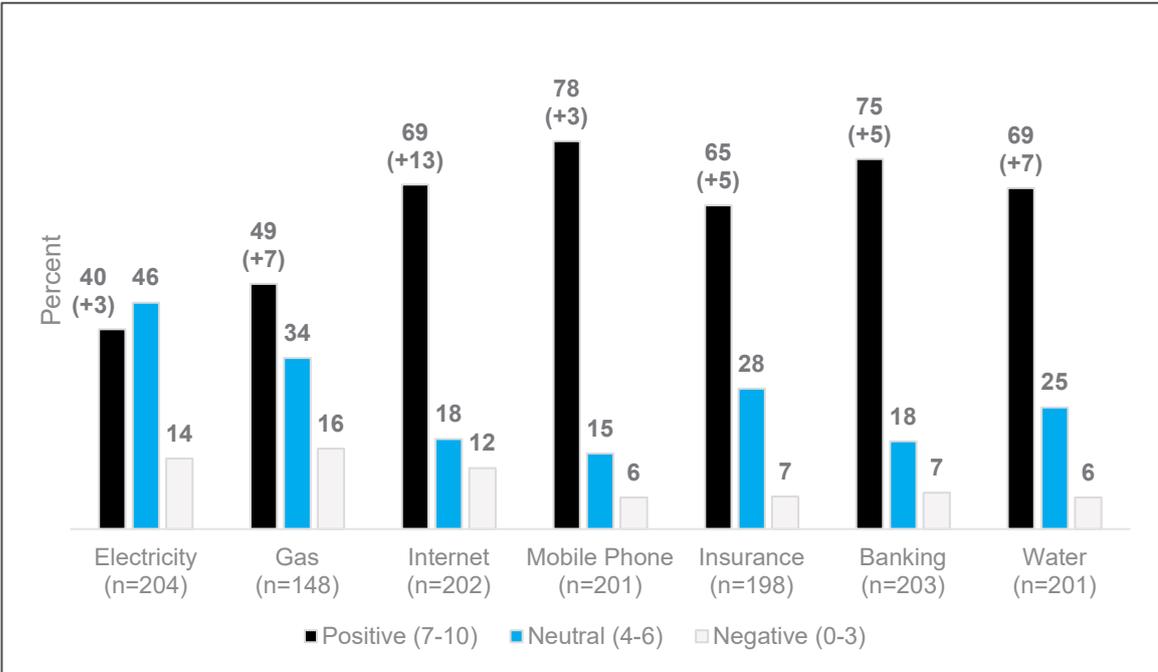
Satisfaction

Satisfaction with utilities and services

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

- Satisfaction with electricity (40% satisfied) and gas (49% satisfied) are behind all other utilities and services in the survey. The next lowest ratings are for insurance (65%), water (69%), and internet (69%).

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



Base: Consumers in ACT with each service

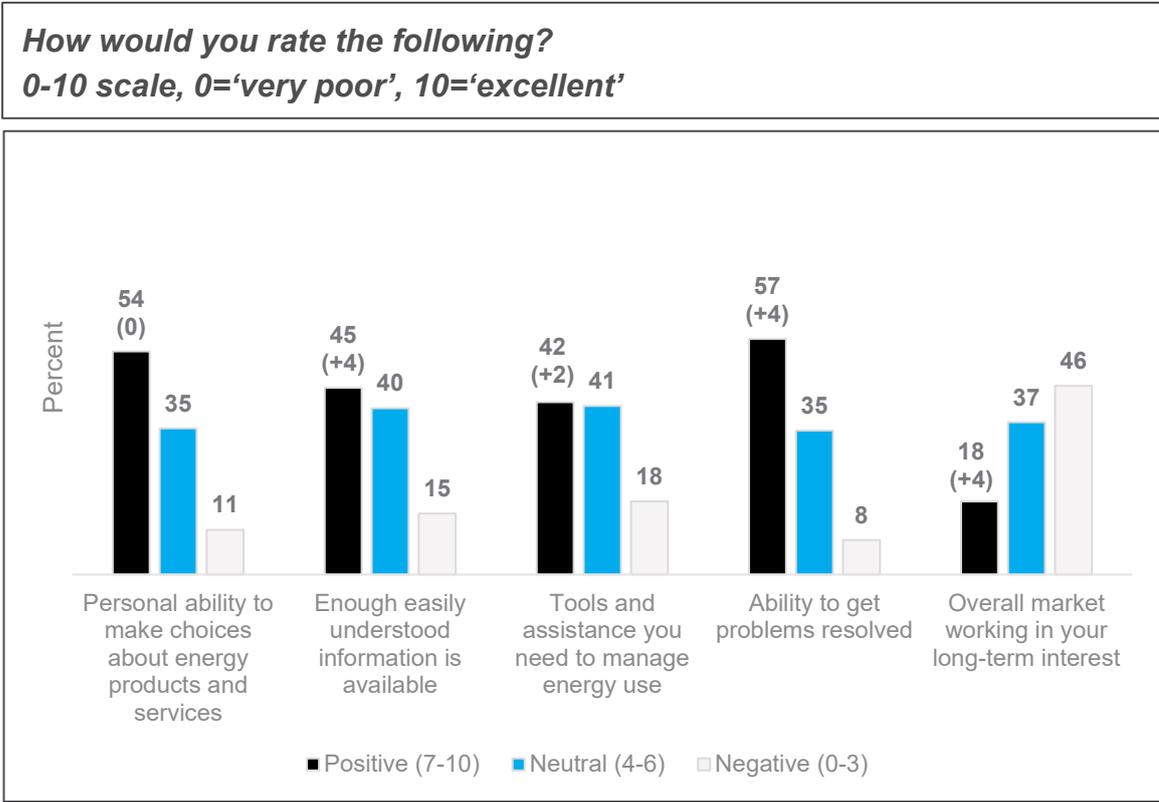


Confidence

Confidence in information, tools and a working market

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

- 18% 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 4%) and 54% say they are confident in their own ability to make choices about energy products and services.
- Comparatively low proportions are confident in the availability of easily understood information (up 4% to 45%) and the tools (42%) to help them.



Base: Consumers in ACT (n=204)



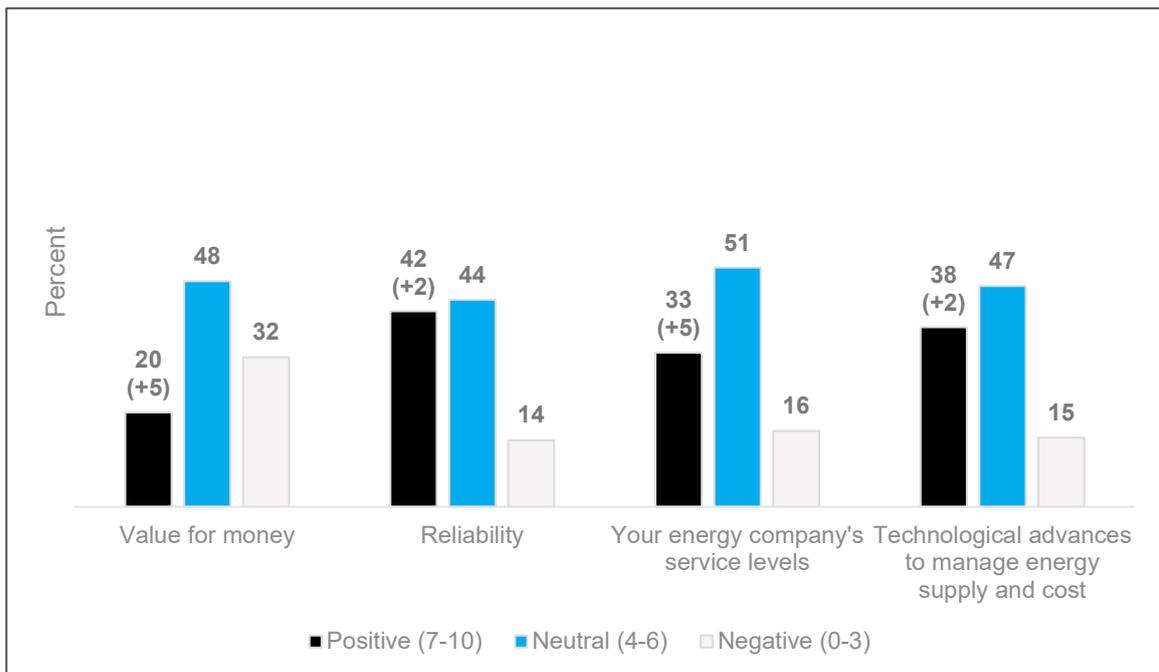
Confidence in long term outcomes

Confidence in specific future outcomes has increased, albeit sometimes from a low base.

- 20% say they are confident the market will provide better value for money in the future (up 5%).
- 33% are confident that the market will improve energy company's service levels (up 5%)

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

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



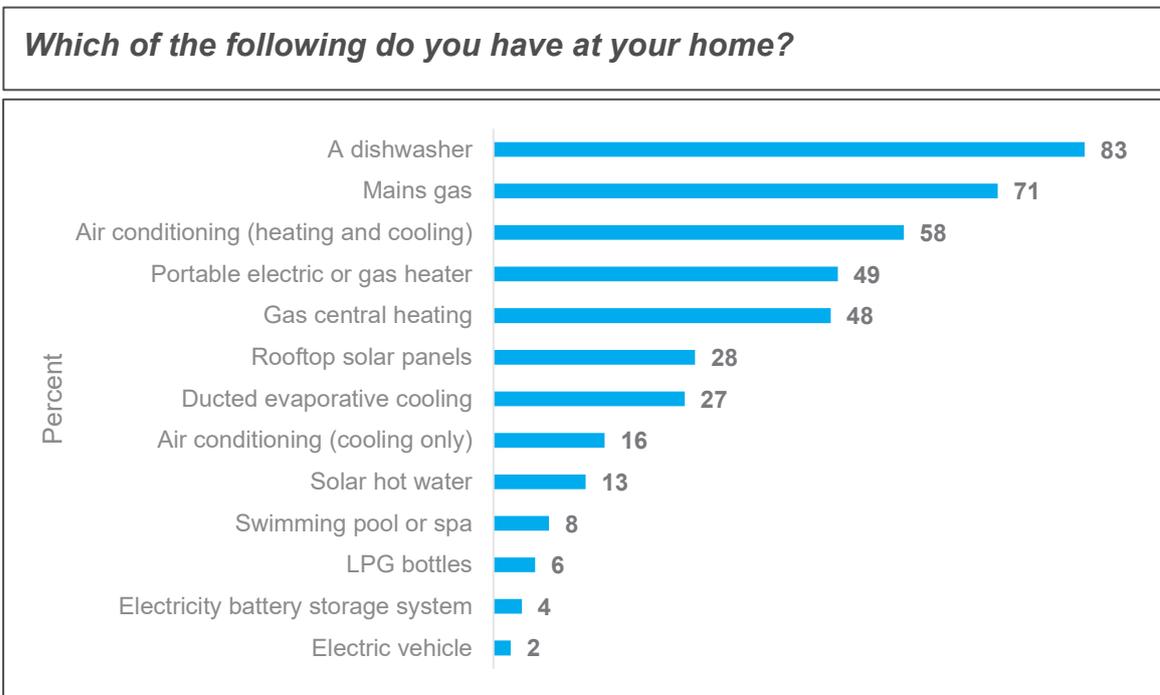
Base: Consumers in ACT (n=204)



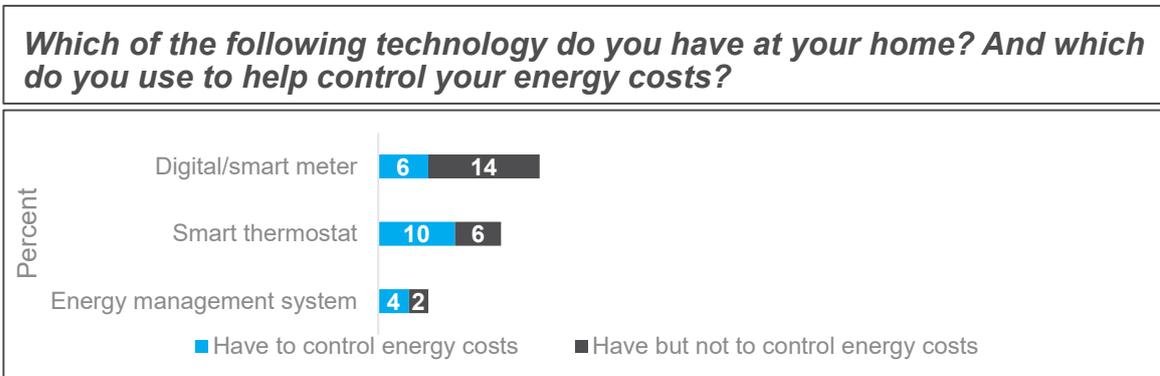
Use of technologies

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

- 48% have gas central heating.
- 58% say they have air conditioning for heating and cooling.
- 49% say they have a portable electric or gas heater.
- 28% say they have rooftop solar panels.



Base: Consumers in ACT (n=204)



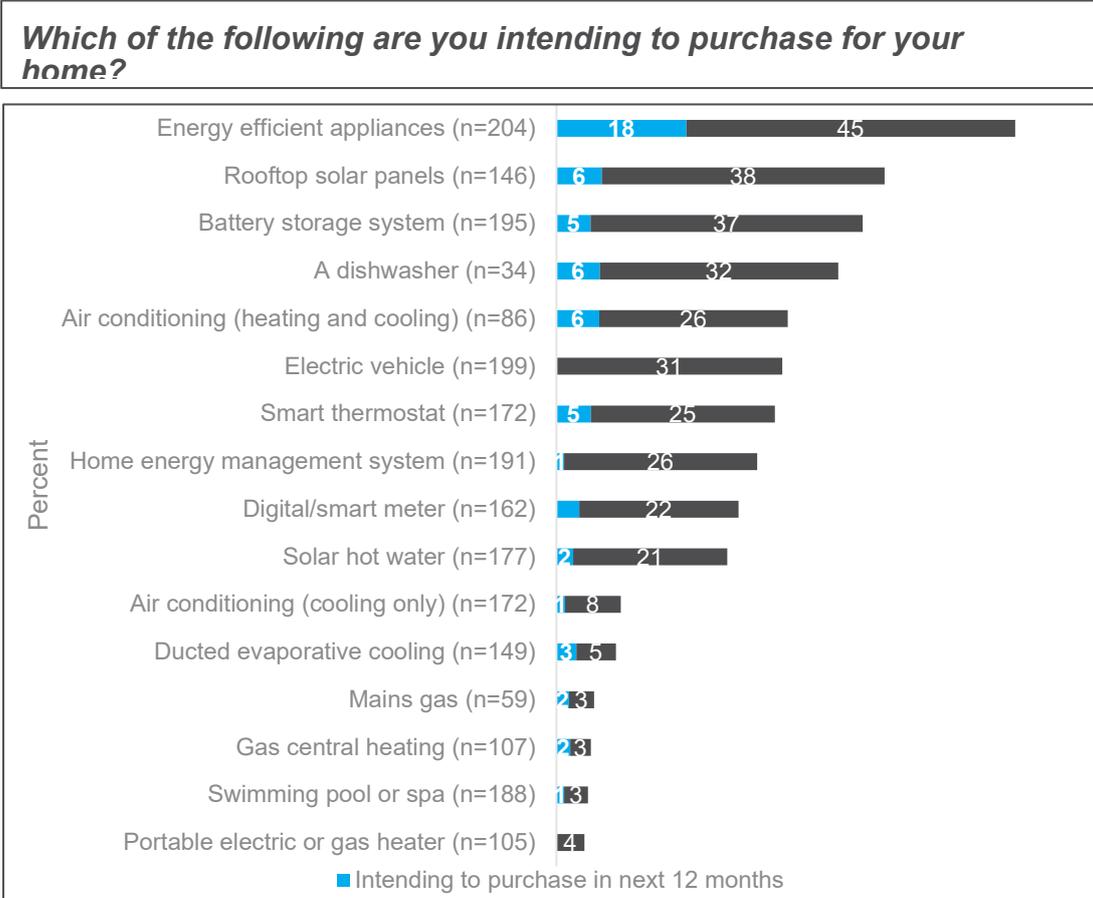
Base: Consumers in ACT (n=204)



Uptake of technologies

ACT household consumers are more likely than consumers in any of the states to say that they are considering rooftop solar, air conditioning (for heating & cooling), battery storage and / or electric vehicles.

- Of the households who reported having solar panels, 64% expressed interest in adding a battery storage system.
- 44% say they are considering rooftop solar panels, with 6% intending to purchase in the next year.
- 42% say they are considering a battery storage system, with 5% intending to purchase in the next year.
- 32% report that they are considering air conditioning that they would use for both cooling and heating.
- 31% say that they are considering purchasing an electric vehicle.



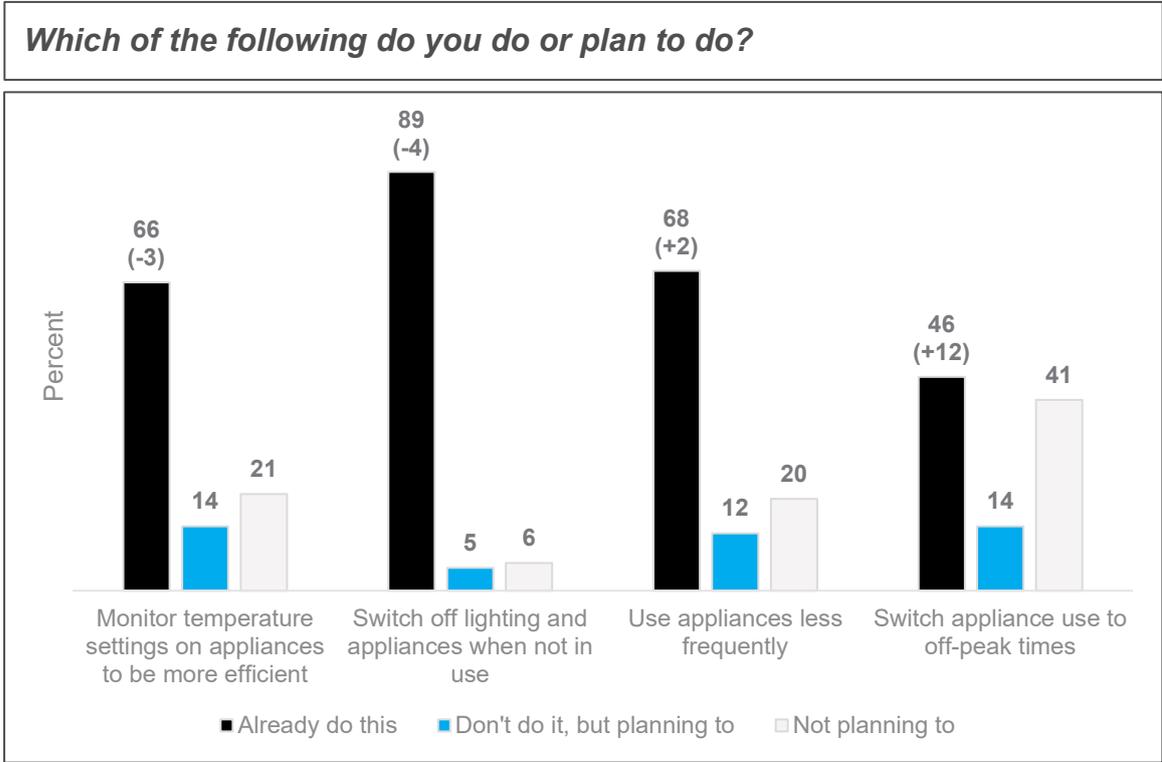
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in the ACT



Energy saving practices

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

- 89% say they switch off lighting and appliances when not in use, and 66% say they monitor temperature settings on appliances.
- 68% say they use appliances less frequently altogether.
- 46% say they already have switched appliance use to off-peak times (up 12%).



Base: Consumers in ACT (n=204)

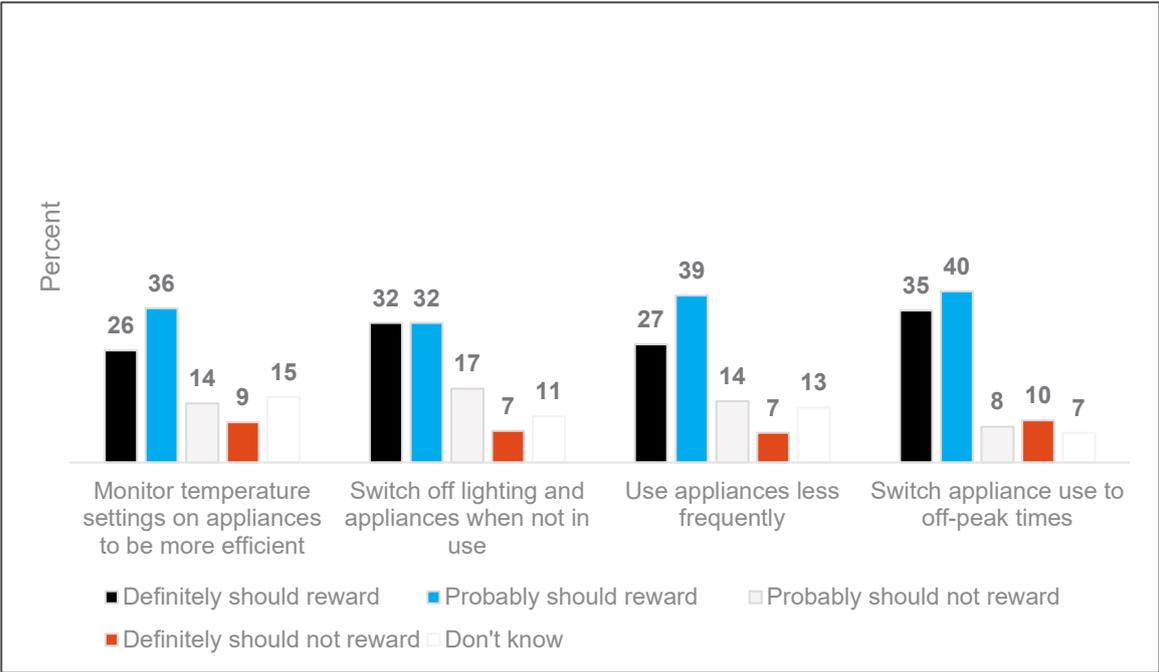


Reward for reducing energy use

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

- 75% think customers should be rewarded for switching appliance use to off-peak times.
- 66% think customers should be rewarded for using appliances less frequently.
- 64% think customers should be rewarded for switching off lighting and appliances when not in use.
- 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:



Base: Consumers in ACT (n=204)

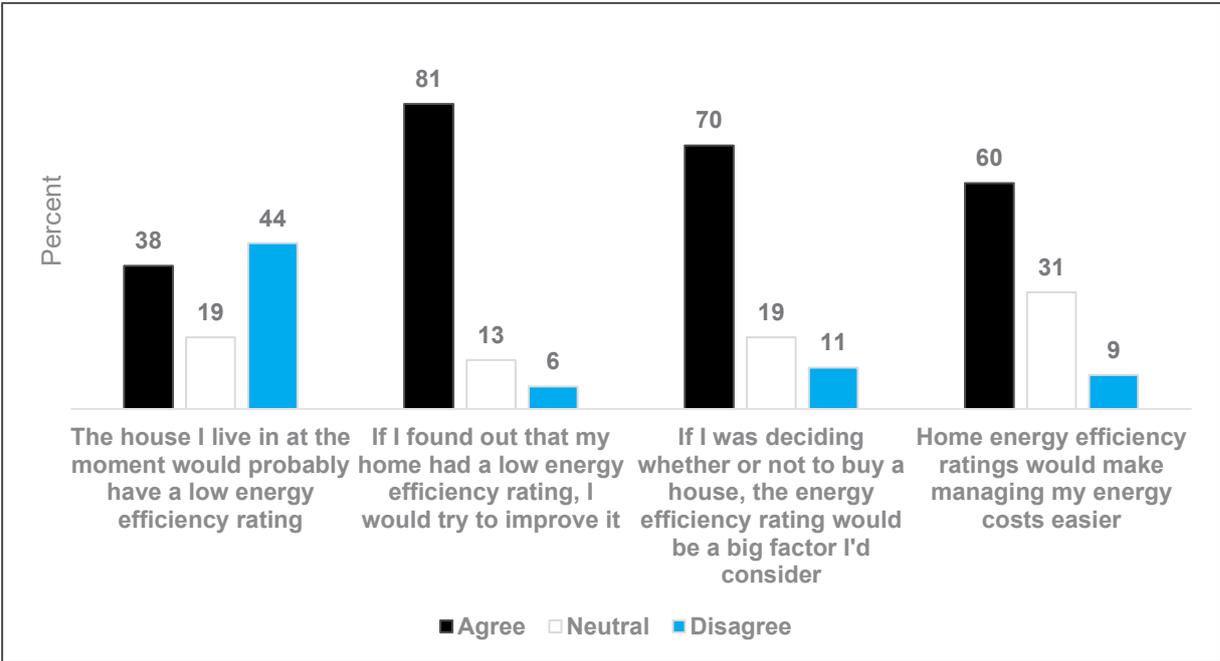


Housing energy efficiency

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

- ACT household consumers are the most likely to have a view on whether their house would have a low energy efficiency rating, with 38% saying that it would (behind only Tasmania) and 44% believing that it would not (higher than any of the states).
- 81% of home owners said they would try to improve their home’s energy rating if they found out it had a low rating, the most in any state or territory.
- 70% said an energy rating would be a big factor they would consider when renting a house.
- 60% said a home energy efficiency rating would make managing their energy costs easier.

Do you agree or disagree with the following?



Base for Statement 1, 3 & 4: Consumers in ACT (n=204)

Base for Statement 2: Home-owners in ACT (n=174)

Note: The data for energy efficiency as a factor in ACT renters’ decisions has been left as the sample size is too small

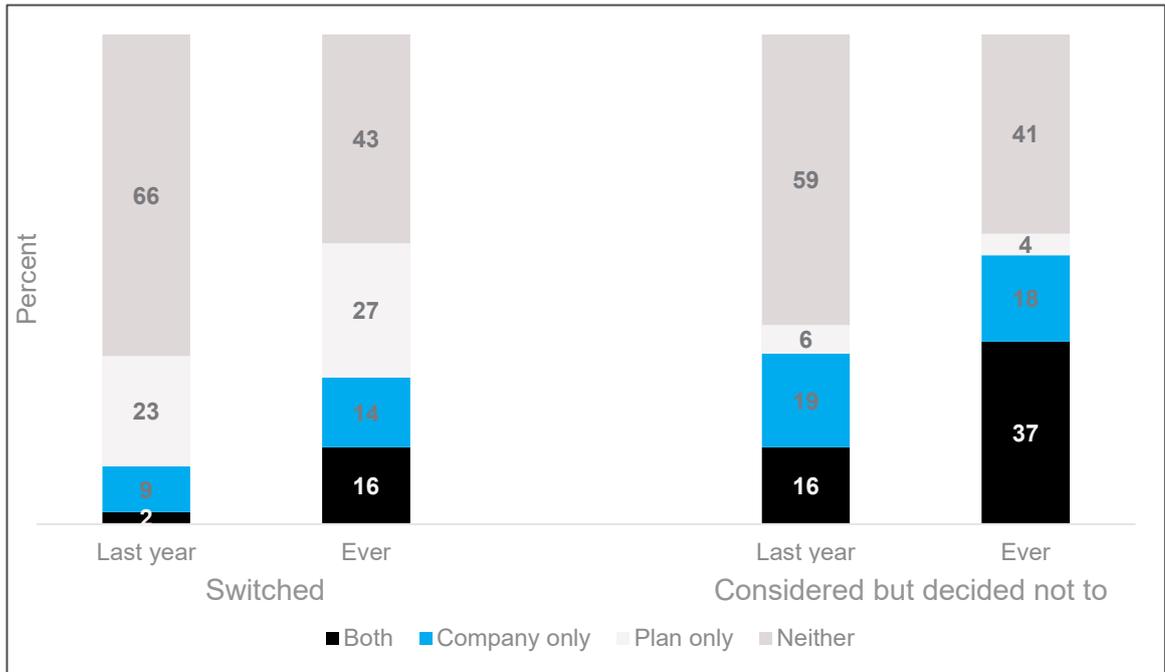


Switching behaviour

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

- 43% say that they have never switched energy companies or plans.
- 32% report switching companies or plans in the past year, while 41% say that, in the past year, they have considered switching companies or plans but not done so

Which of the following have you done?



Base: Consumers in ACT (n=204)



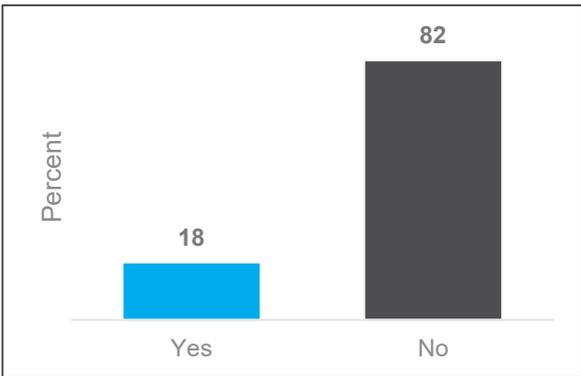
Activity

Reasons for considering switching

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

- 38% said the last time they considered switching they were dissatisfied with the value for money they were getting from their retailer.
- 35% searched for a better plan on a price comparison website.
- 18% of ACT consumers intend to switch companies or plans in the next year.

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



Base: Consumers in ACT (n=204)

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



Base: Consumers in ACT who have switched or looked at switching in the past (n=128)

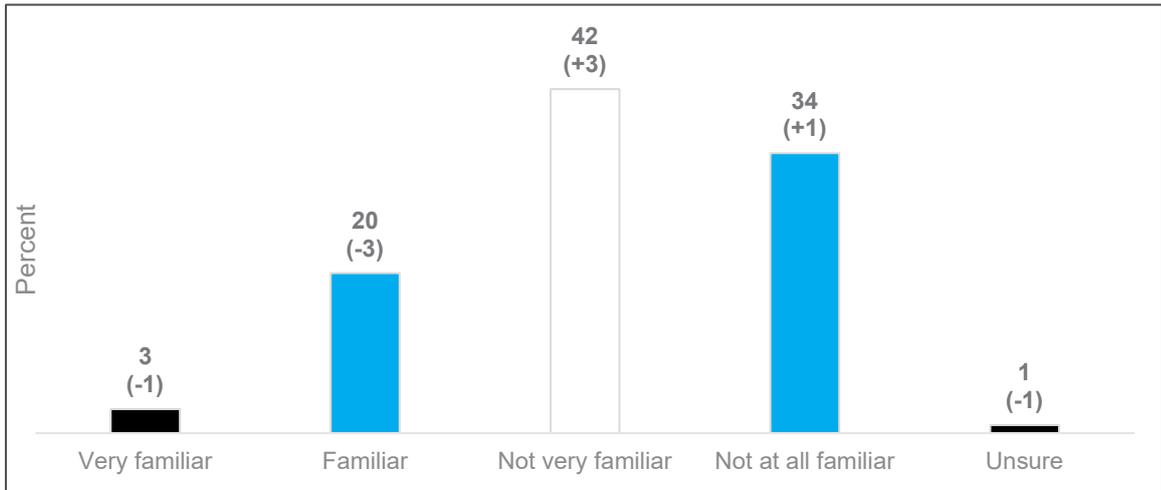


Other

Awareness of the Energy Ombudsman

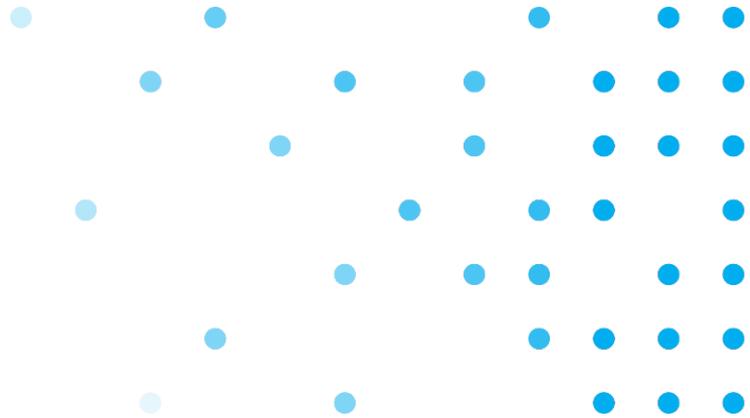
Declared awareness of the Energy Ombudsman is down in the ACT, with 23% now claiming to be familiar or very familiar (down 4%).

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



Base: Consumers in ACT (n=204)

Western Australia





Overall satisfaction

Overall satisfaction with electricity and gas services amongst Western Australian household consumers has increased slightly since June 2018.

- 78% are satisfied with their electricity and gas services (up 4%).

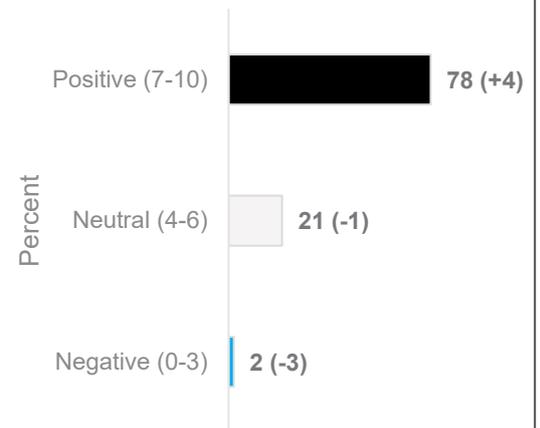
The proportion of household consumers in Western Australia that are satisfied with the level of competition in the market has decreased slightly.

- 38% now say they are satisfied with competition levels (down 2%).

Satisfaction

Overall Satisfaction

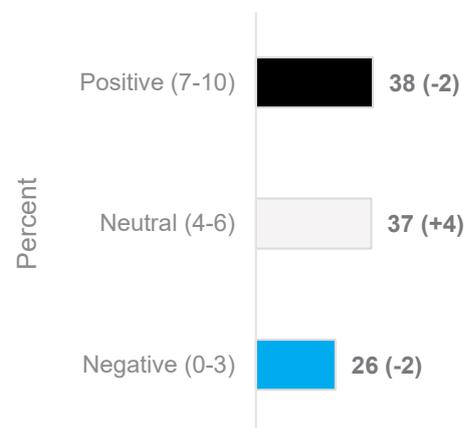
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months?



Base: Consumers in WA (n=200)

Satisfaction with competition

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



Base: Consumers in WA (n=200)



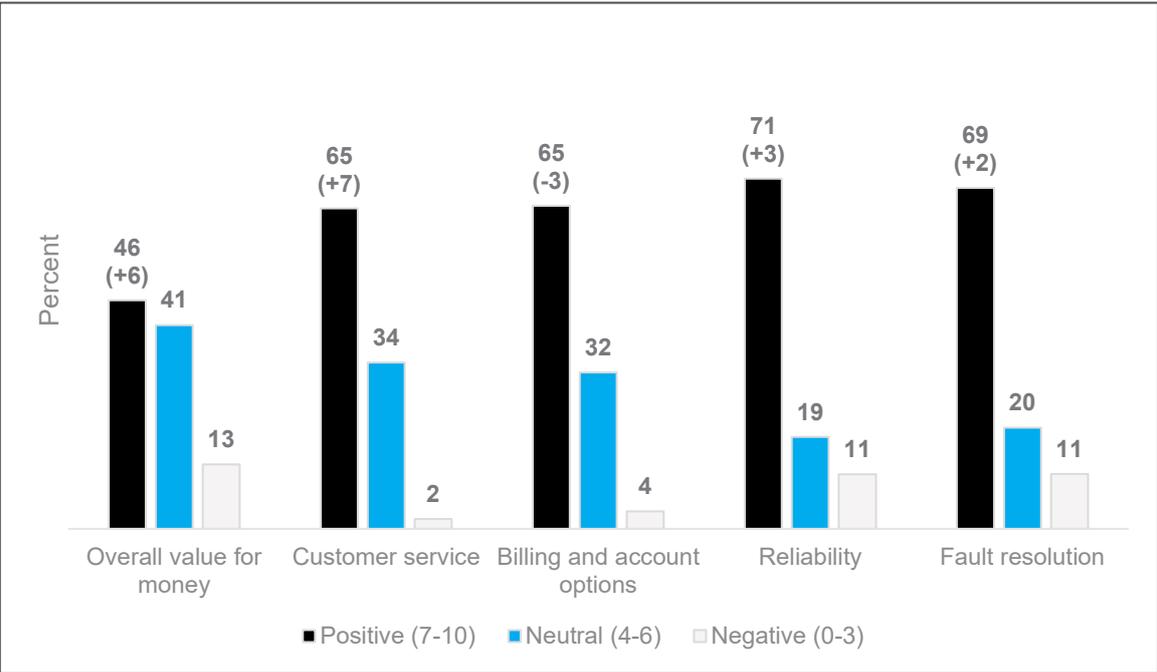
Satisfaction

Satisfaction with electricity

Satisfaction with most electricity-related measures has increased.

- 65% say they are satisfied with the customer service they receive (up 7%).
- 46% say they are satisfied with value for money outcomes for their electricity service (up 6%).
- 71% say they are satisfied with the reliability of their electricity supply, up 3%.
- 69% say they are satisfied with the fault resolution provided to them (up 2%).
- 65% say they are satisfied with their billing and account options (down 3%).

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



Base: Consumers in WA with electricity supply (n=200)
Base for fault resolution: Those in WA who had a power outage or rated 0 to 9 satisfaction with outage (n=118)



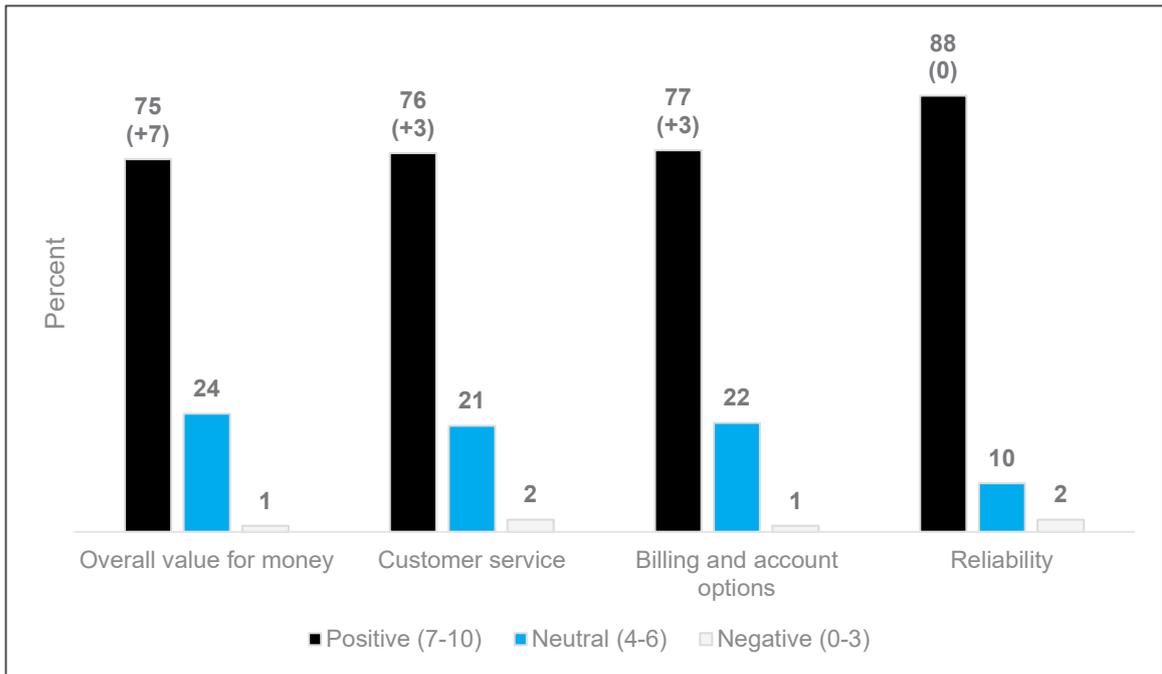
Satisfaction

Satisfaction with gas

Satisfaction with gas services has generally increased for Western Australian household consumers.

- Satisfaction with billing and account options has increased 3% to 77%.
- Satisfaction with reliability of gas services has remained unchanged at 88%.
- Satisfaction with customer service has increased by 3% to 76%.
- Satisfaction with overall value for money for gas has increased by 7% to 75%.

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



Base: Consumers in WA with gas supply (n=164)



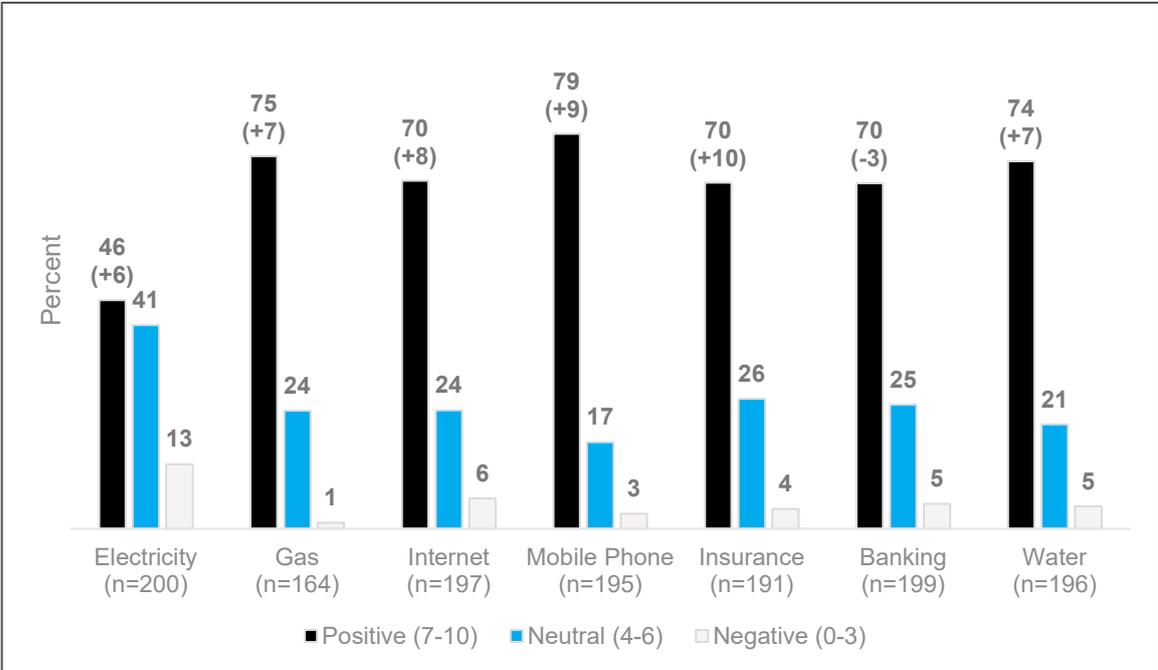
Satisfaction

Satisfaction with utilities and services

Satisfaction with electricity continues to trail other utilities and services in terms of value for money.

- Satisfaction with electricity (46%) is behind all other utilities and services in the survey in terms of value for money.
- At 75%, satisfaction with gas is bettered only by 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?
0-10 scale, 0='very poor', 10='excellent'



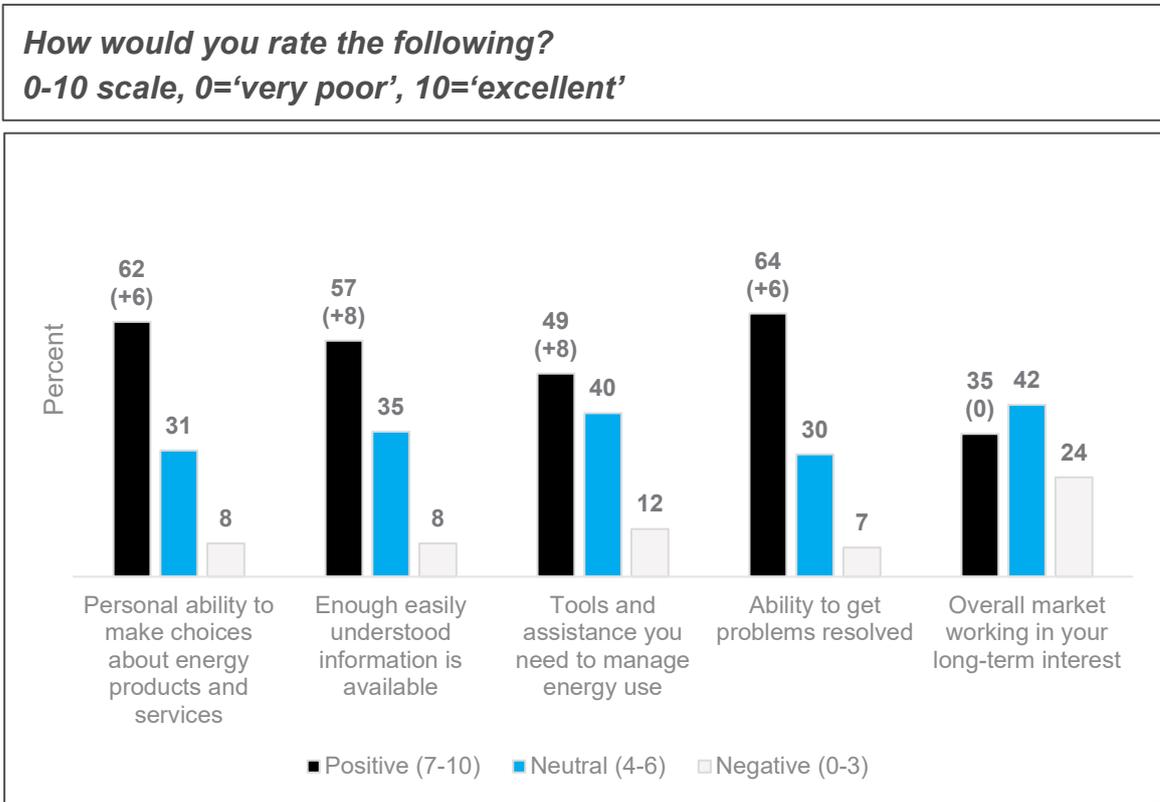
Base: Consumers in WA with each service



Confidence in information, tools and a working market

Consumers’ confidence in the information and tools available to them increased in this survey.

- 57% say there is enough easily understood information available, up 8% from June 2018.
- 62% are confident in their own ability to make choices about energy products, up 6%.
- Consumers’ confidence that the market is working in their long-term interest remains low at 35%.



Base: Consumers in WA (n=200)

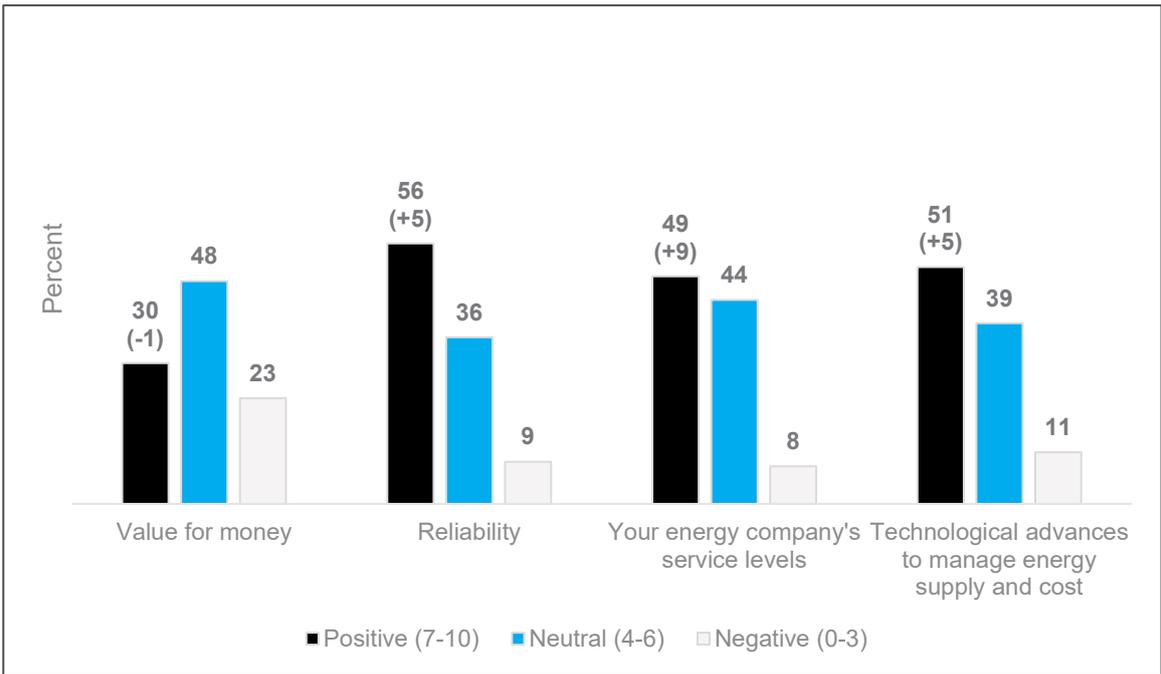


Confidence in long term outcomes

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

- 56% said they were confident the market would provide greater reliability (up 5%).
- 51% said they are confident that technological advances will improve energy management in terms of cost and supply (up 5%).
- Consumers' confidence that the market will deliver better overall value for money in the future continues to be low at 30%, down marginally.

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



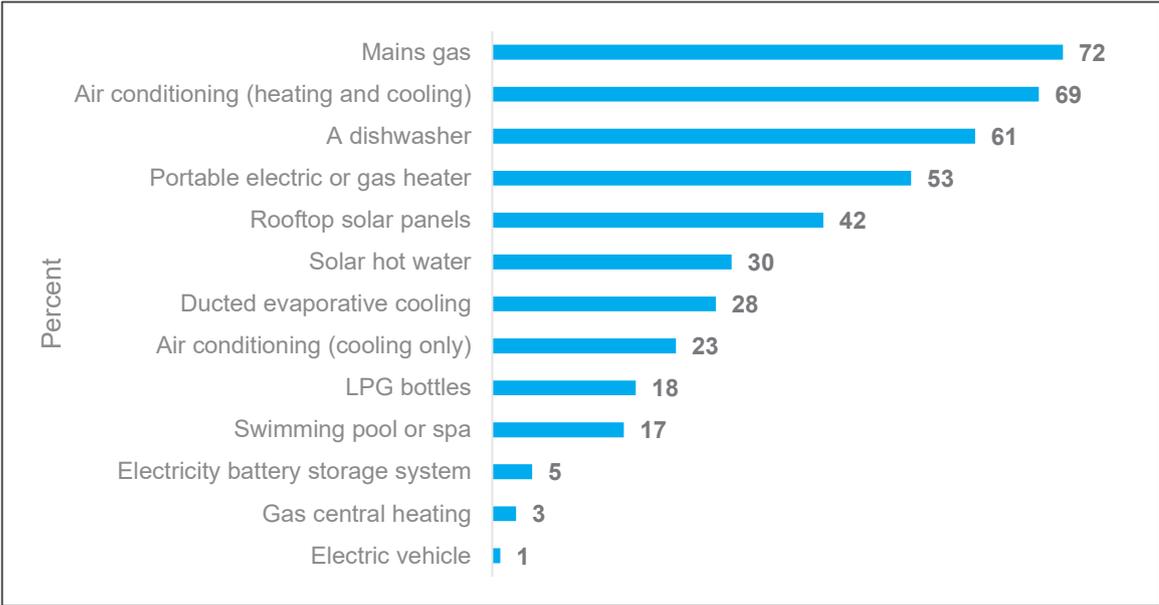
Base: Consumers in WA (n=200)



Use of technologies

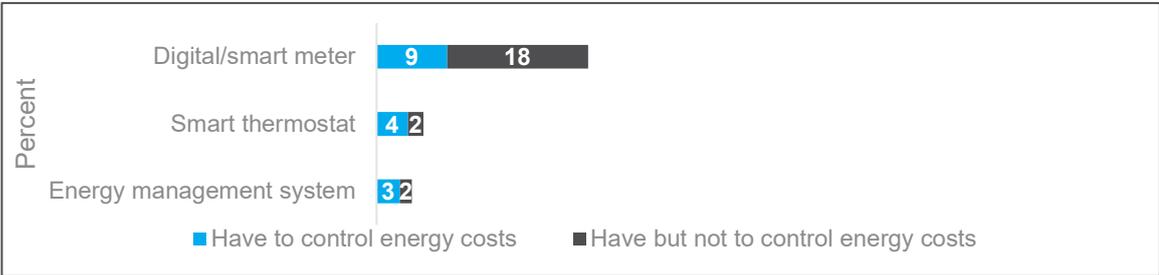
Western Australian household consumers in this survey are the most likely to have solar hot water, and behind only Tasmania for portable heaters. A very high proportion report having rooftop solar panels.

Which of the following do you have at your home?



Base: Consumers in WA (n=200)

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



Base: Consumers in WA (n=200)

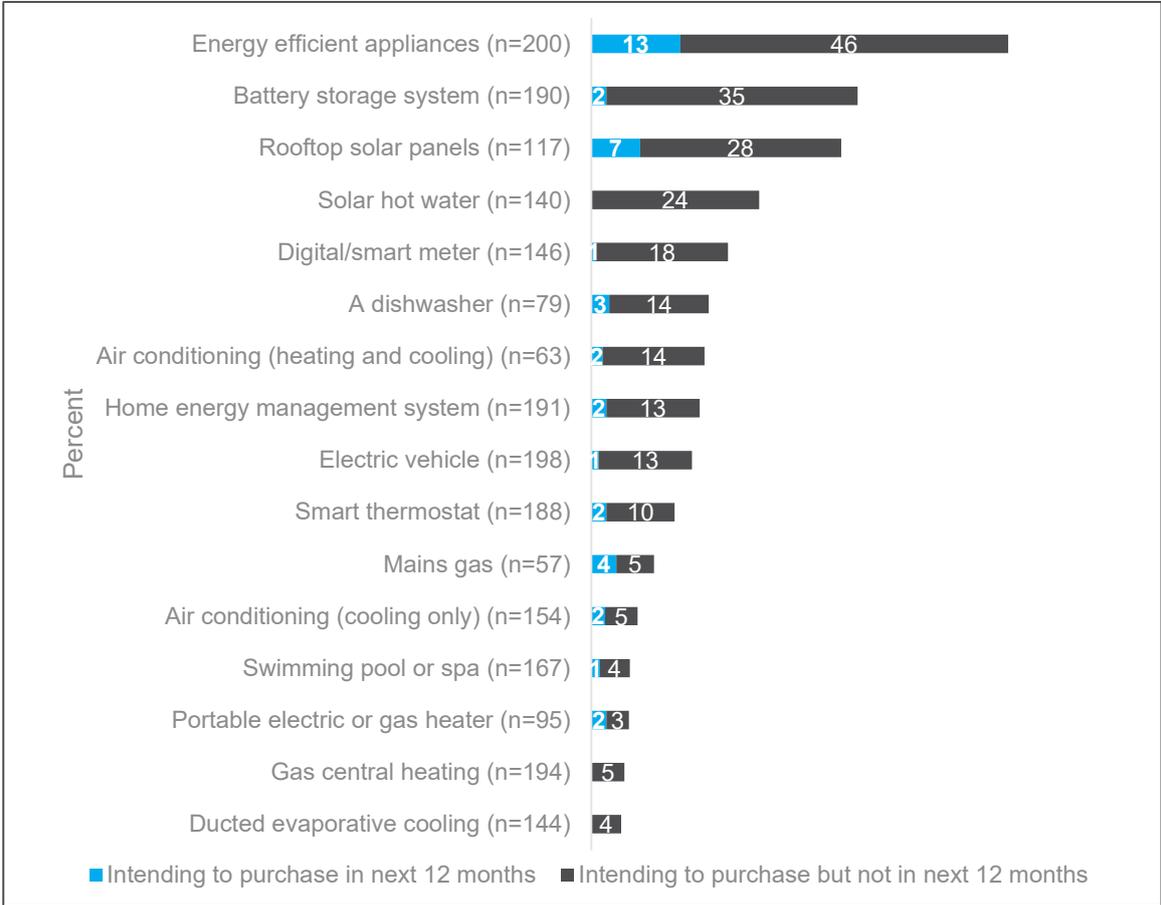


Uptake of technologies

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

- Of the households who reported having solar panels, 60% expressed interest in adding a battery storage system.

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



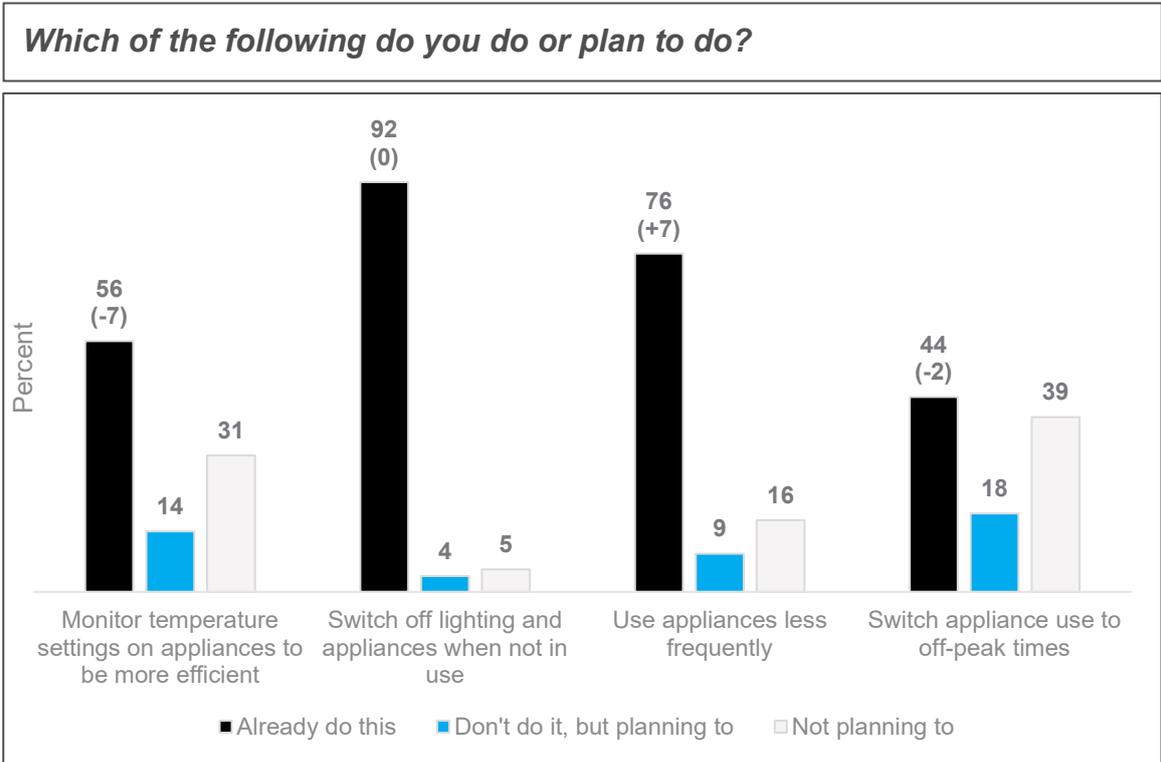
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in WA



Energy saving practices

The proportion of Western Australian household consumers saying that they already use appliances less frequently is up, but the proportion saying that they monitor temperature settings on appliances is down.

- 76% say they use appliances less frequently (up 7%).
- 56% report that they monitor temperature settings on appliances to be more efficient (down 7%).
- 44% say they already switch appliance use to off-peak times (down 2%).



Base: Consumers in WA (n=200)

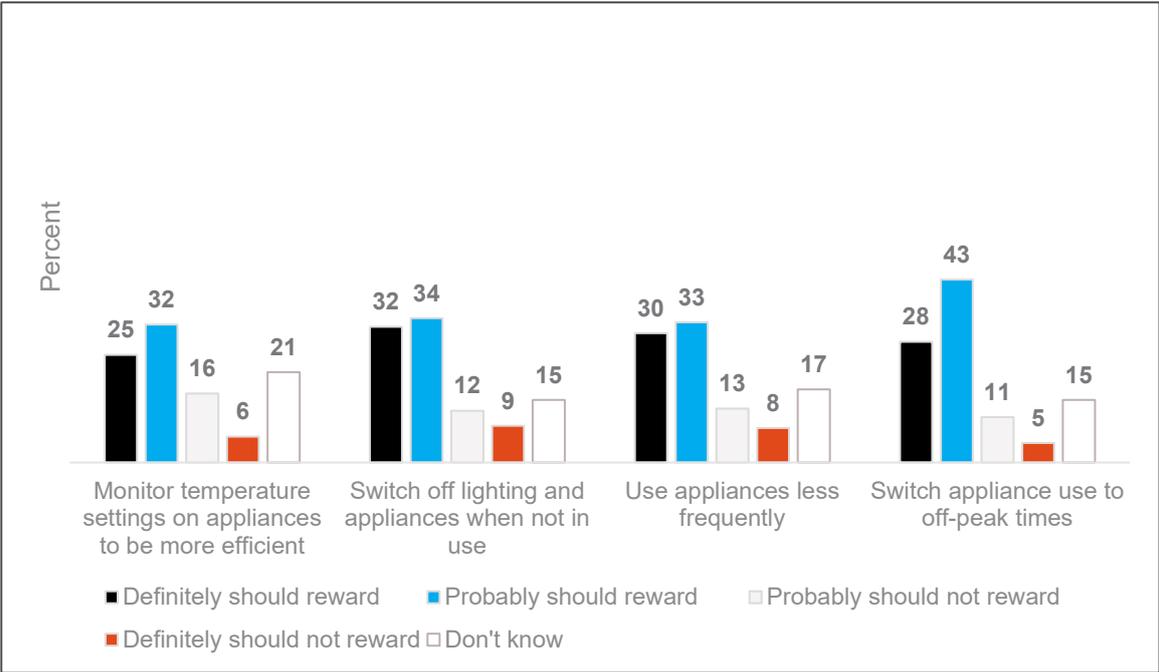


Reward for reducing energy use

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

- 71% think 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.
- 63% think customers should be rewarded for using appliances less frequently.
- 57% 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:



Base: Consumers in WA (n=200)

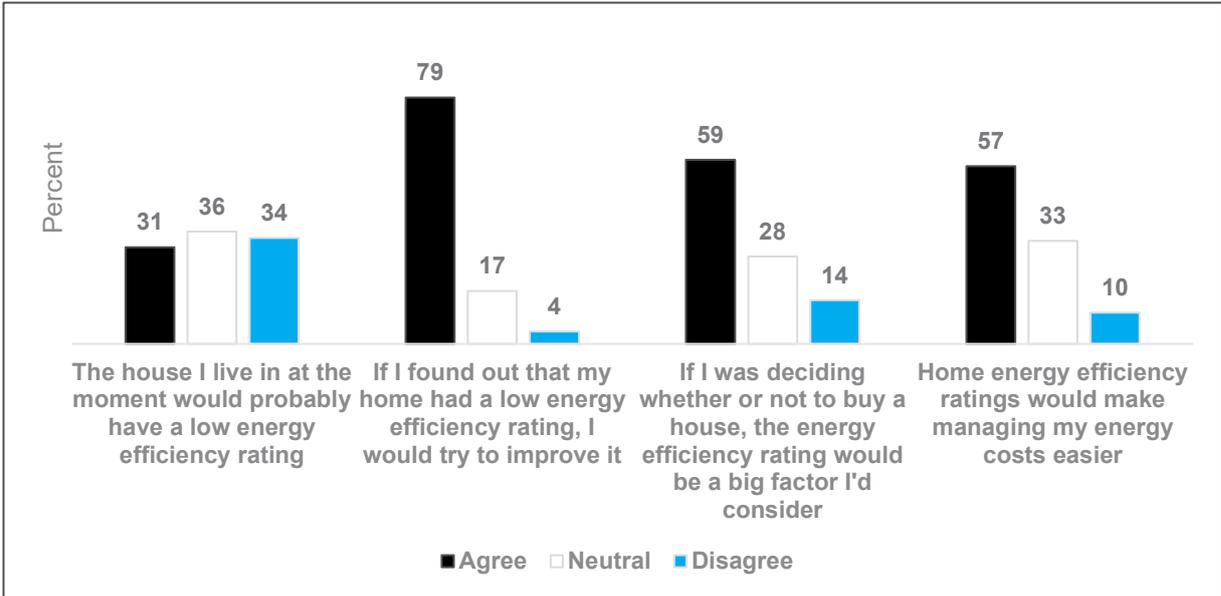


Housing energy efficiency

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

- 31% think that the home they live in at the moment would probably have a low energy efficiency rating, while 34% believe that it would not.
- 79% said they would try to improve their home's energy efficiency rating if they found out it had a low rating.
- 59% said an energy efficiency rating would be a big factor they would consider when buying a house.
- 57% said a home energy efficiency rating would make managing their energy costs easier.

Do you agree or disagree with the following?



Base for Statement 1, 3 & 4: Consumers in WA (n=200)

Base for Statement 2: Home-owners in WA (n=104)

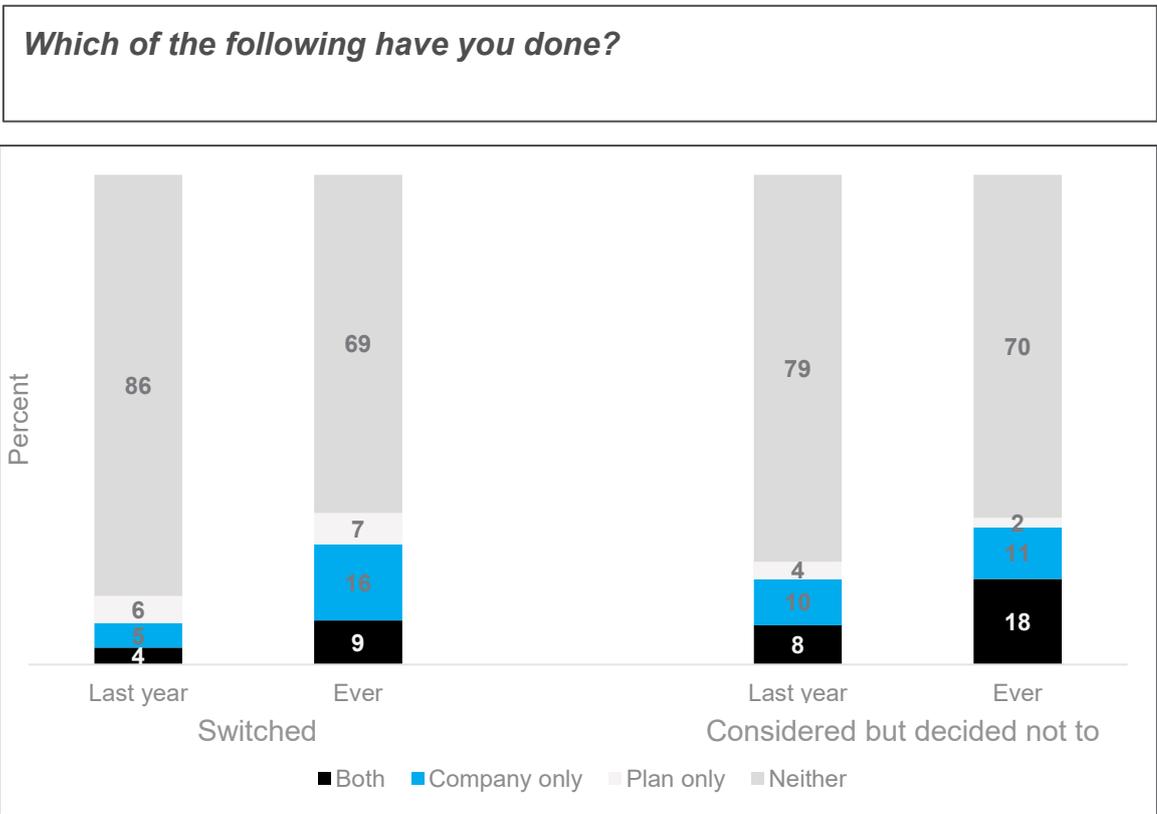
Note: The data for energy efficiency as a factor in WA renters' decisions has been left out : sample size is too small



Switching behaviour

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

- 15% say they have switched energy companies or plans in the past year.
- 69% say they have never switched energy companies or plans.
- 22% say they have considered switching energy companies or plans but decided not to in the past year.



Base: Consumers in WA (n=200)



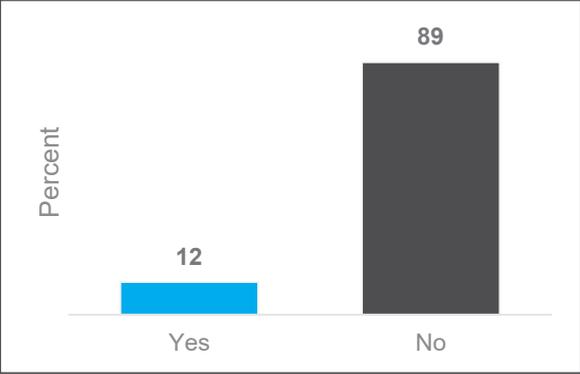
Activity

Reasons for considering switching

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

- 36% of those who have looked at switching said they were approached by a competitor.
- 30% said they were dissatisfied with the value for money of their retailer.
- 12% plan to switch energy companies or plans in the next 12 months.

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



Base: Consumers in WA (n=200)

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



Base: Consumers in WA who have switched or looked at switching in the past (n=81)
Note: Small sample size, results are indicative only

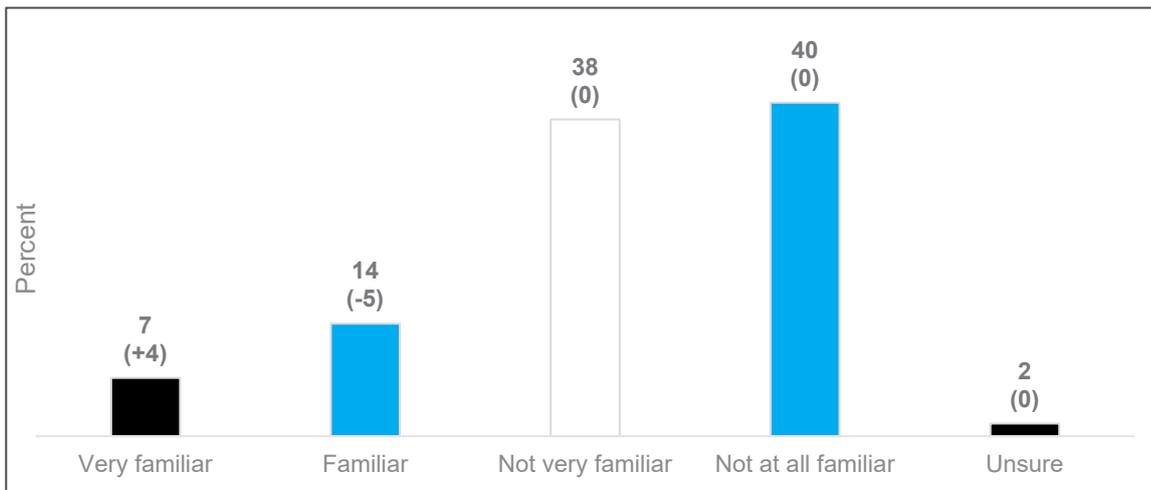


Other

Awareness of the Energy Ombudsman

21% of household consumers in WA 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?



Base: Consumers in WA (n=200)

CONFIDENTIAL

Energy Consumers Australia

Energy Consumer Sentiment
Survey

March 2019

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 skip S2

If S1a ONLY contains code 1 or 2 or 3 AND S1≠3 AND S2=3 THEN DO NOT TERMINATE at S2. They 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?
[Open-ender, 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 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. Liquefied Petroleum Gas (LPG in bottles –
excluding those only used for BBQs or
camping)
3. Electricity generated by solar panels on your
roof (not solar hot water)
4. 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. Liquefied Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your

roof (not solar hot water)

4. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated in your home – especially solar electricity)
5. 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 2

A6 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?

[Open-ended 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 cost. 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]

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

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)

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?

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

