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Energy Consumers Australia

Energy Consumer Sentiment Survey

December 2020

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Notes on methodology

This online survey was in the field from 16 September to 13 October 2020.

- It was conducted following around six months of restrictions in Australia and while Victoria still remained in Stage 4 lockdown due to the COVID-19 pandemic. It therefore provides an opportunity to see how the pandemic and its resulting economic impacts have affected perceptions of electricity and gas.

The survey fieldwork was conducted by Qualtrics using participants from online research panels.

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 placed on the consumer sample by age and gender, and business sample by business size. The final data was weighted based on ABS data by state, territory, and participant type.

This is the tenth 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 eighth wave, reported in December 2019.

- We compare results with the same survey last year rather than with the most recent survey 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 (autumn data collection, odd numbered waves) and deteriorate in winter (spring data collection, even numbered waves).

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).

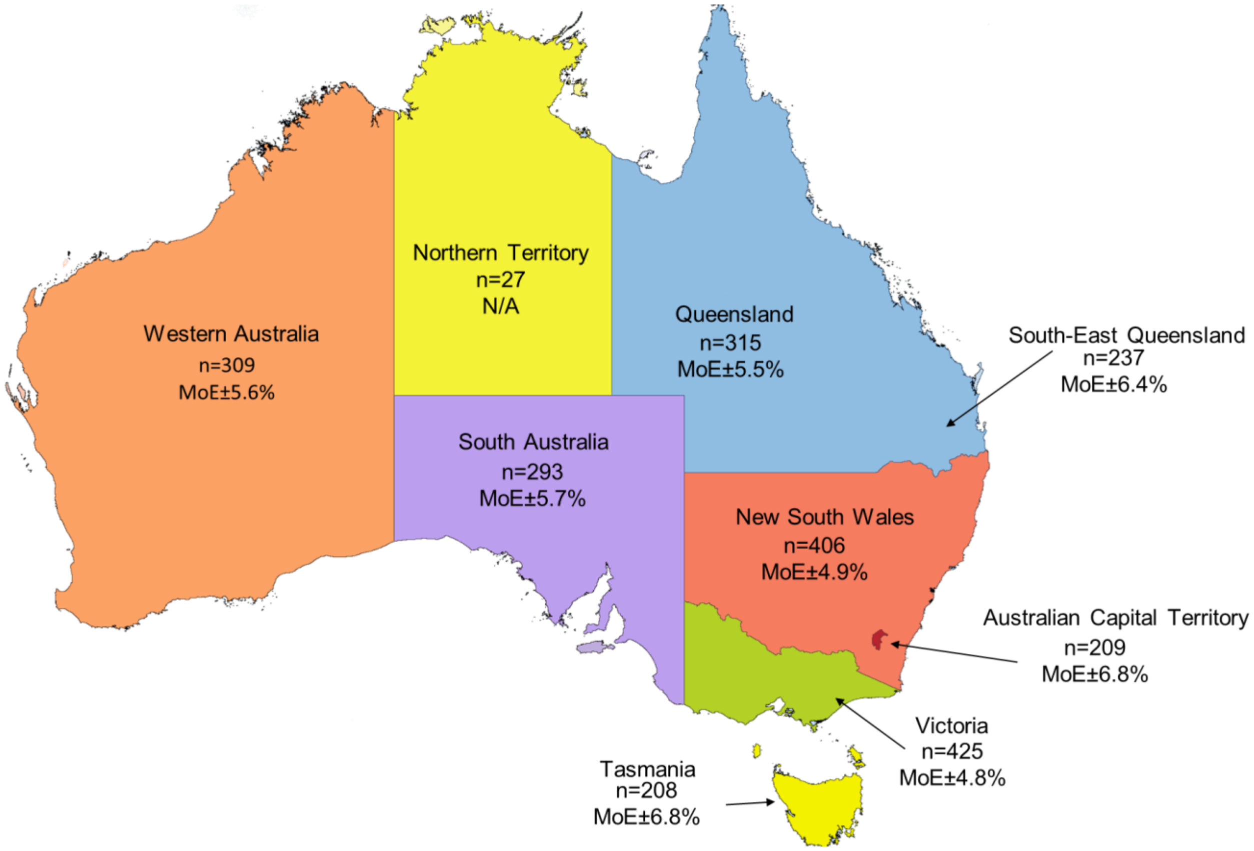
The comparison charts also often include a ‘national average’ for households.

- 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 results reported in December 2019 in brackets.

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

Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
n=523, MoE* = ±4.3%
(MoE = Margin of Error)
* ‘Queensland’ includes SEQ

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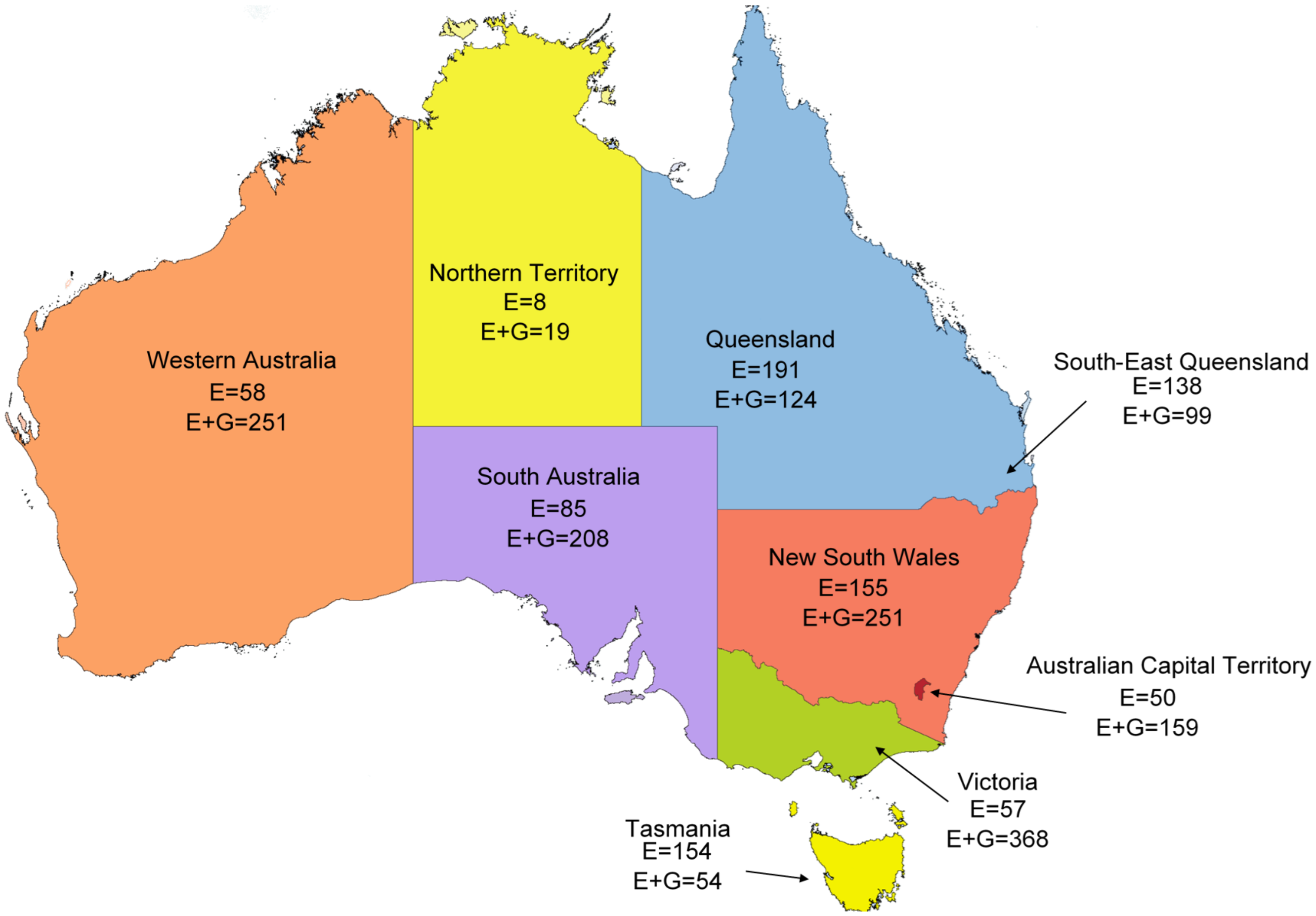
Samples by energy types



KEY
E Only electricity
E+G Electricity and gas

Plus nationwide:

Businesses with less than 200 employees
E (n=178)
EG (n=345)
* 'Queensland' includes SEQ

Summary Findings

Summary of key findings

The general improvements seen in recent waves of the Energy Consumer Sentiment Survey have been maintained or continued in this survey.

- 57% of household consumers now say they are satisfied with the value for money of electricity, up 4% over the past year and 22% since the same point in 2017. Amongst small business consumers, satisfaction is up 4% over the past year and 16% since December 2017 (60% are satisfied).
- While still relatively low, confidence amongst household consumers that the market is working in consumers' interests is the highest it has ever been. Whereas in December 2017, 21% of household consumers said they were confident the market was working in their interests, in December 2020 this has risen to 38%. Confidence amongst small business consumers is also up compared with December 2017, but at 45% is around the 41%-48% range it has been in most waves of this study.

Where we may potentially have seen some impact from the COVID-19 pandemic and its economic effects is in consumer willingness to reduce their energy use during periods of peak demand and fewer household consumers expecting to invest in technology to manage their energy use in the future.

- 46% of household consumers and 45% of small business consumers report that they would be willing to reduce their energy use without a financial incentive, down 3% and 6% respectively since December 2019.
- 23% of household consumers who do not currently have rooftop solar now say they are interested in getting it, down 5% over the past year.
- 22% of household consumers who do not currently have battery storage say they are interested in getting it, down 7% since December 2019.
- 18% of household consumers who do not currently have solar hot water say they are interested in getting it.
- The story is different among small businesses who are generally more likely to be looking to invest in technology to manage their energy use, compared with December 2019.

We also saw considerable numbers of consumers saying they had reached out to their energy company for help with their bills or expect to do so in the future.

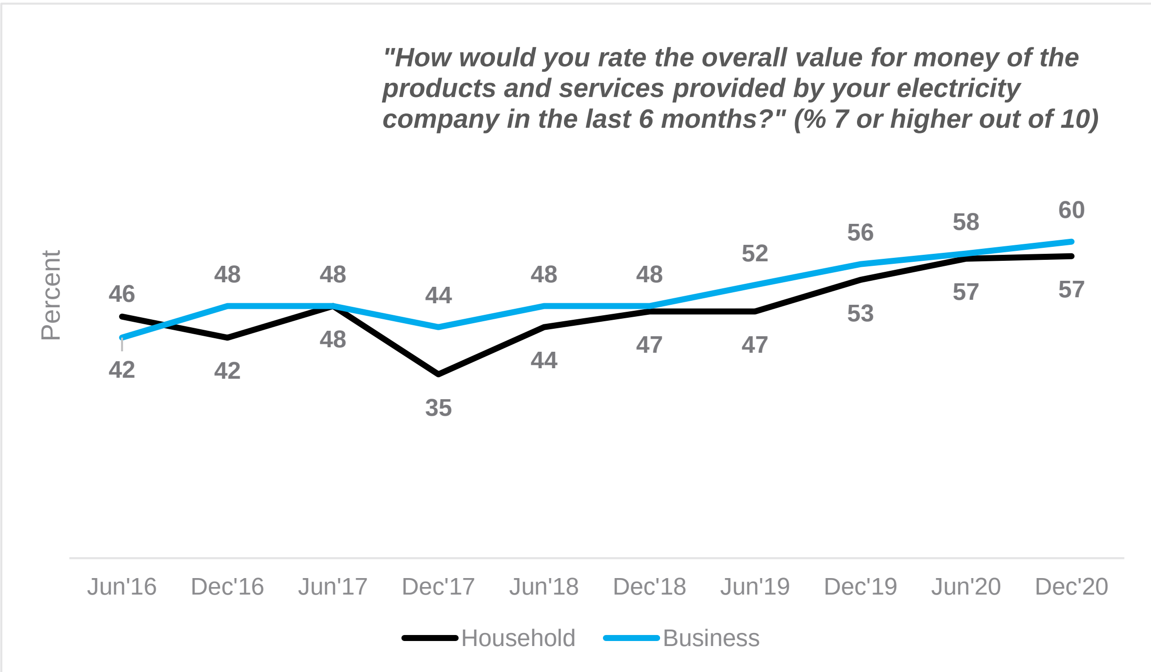
- The proportion of household consumer saying they have sought help since the pandemic is 15% with 6% saying they have not received useful help.
- About 10% of household consumers say they expect to seek help from the energy company in the future.
- Only 36% of household consumers said they had received useful communications from their energy company since the pandemic began.

Trends

Long-term findings

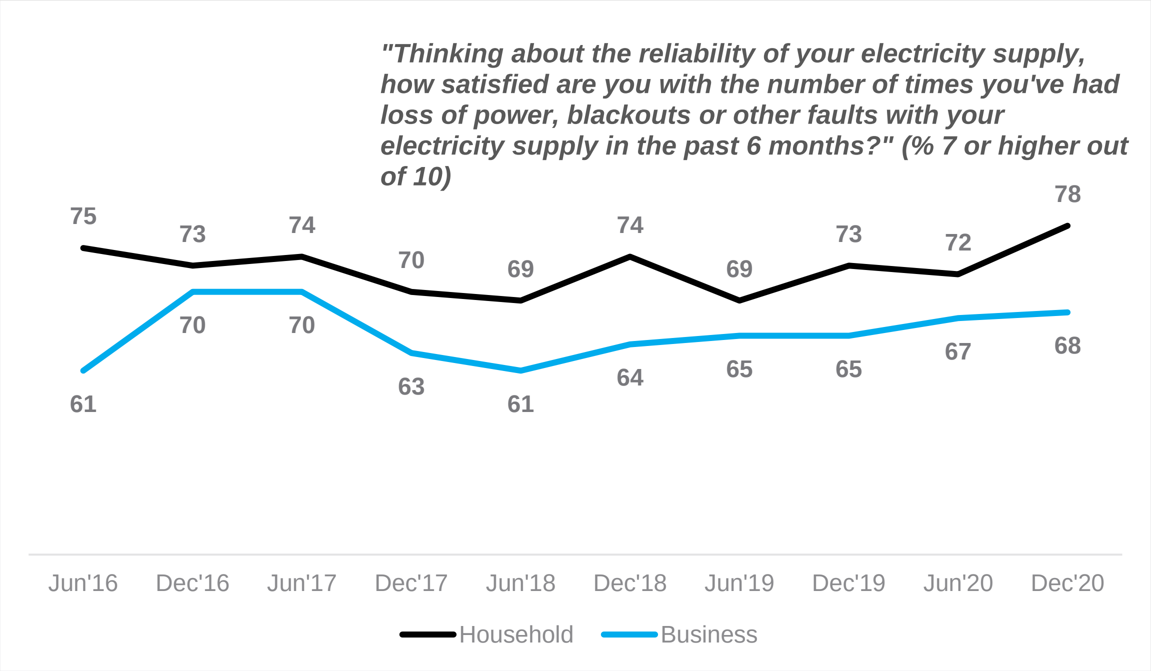
Household rating of the value for money of their electricity service is at 57% and the equal highest rating since tracking started four years ago.

The upward trend of overall positive ratings with value for money of electricity products and services has continued for small business consumers. It is now at 60% - again the highest rating since tracking started four years ago.



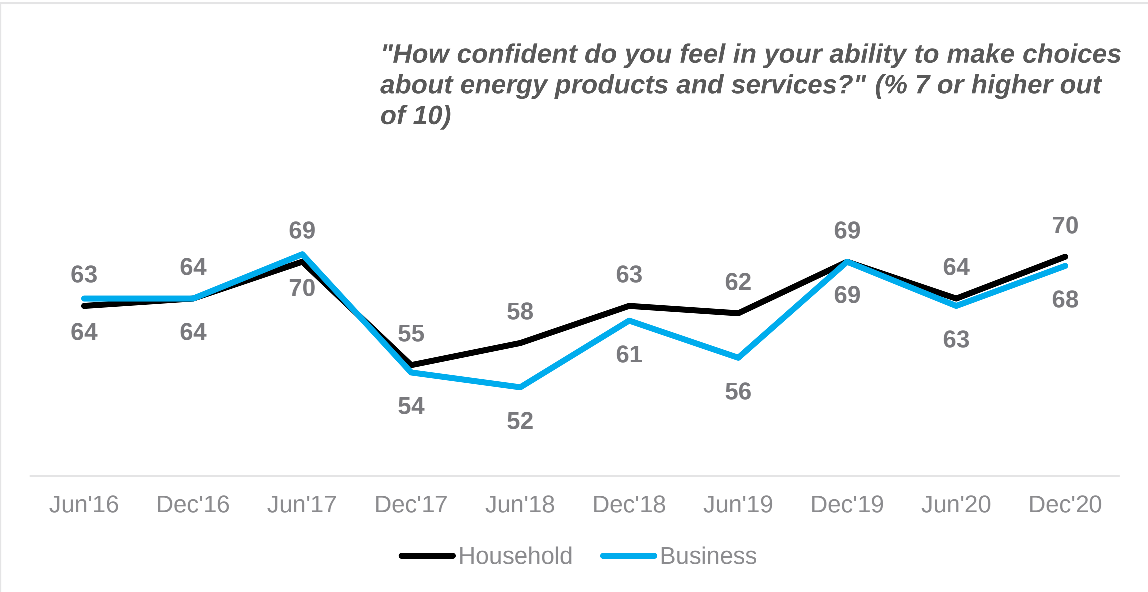
Base: All Household (n=2,192) & Business consumers (n=523)

Satisfaction with the reliability of electricity supply has trended up since December 2017 with 78% of household consumers now satisfied with the number of times they lost power in the past six months – the highest result since the survey began – and 68% of small businesses satisfied on the same measure.



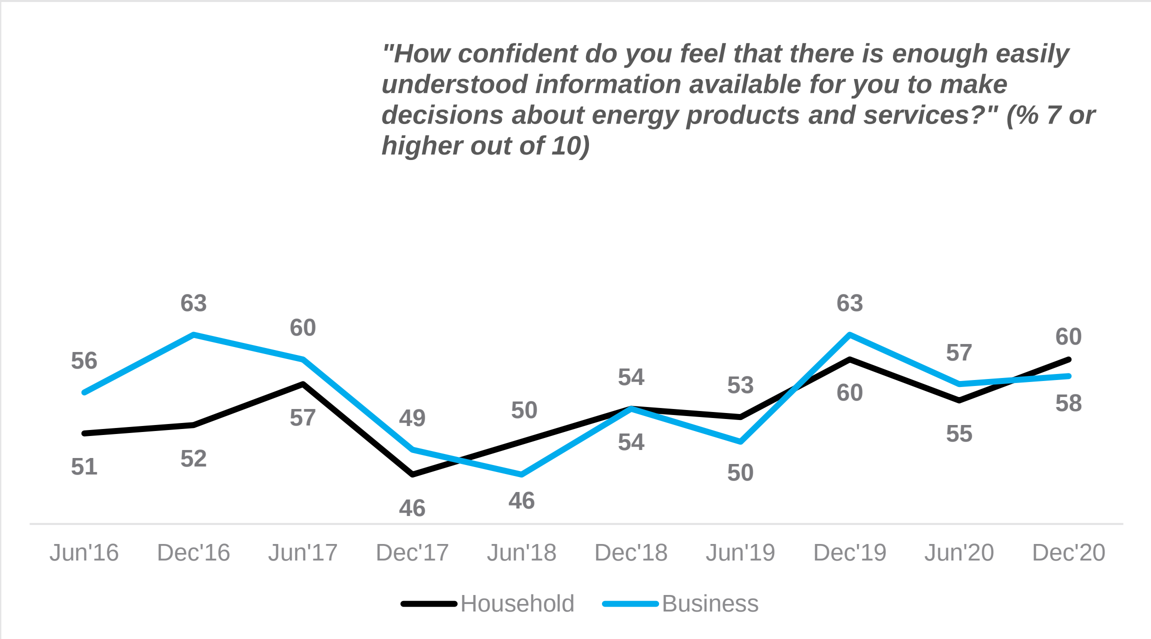
Base: All Household (n=2,192) & Business consumers (n=523)

Household consumers' confidence in their ability to make energy choices is at 70%, continuing the general upward trend. Small businesses' confidence on the same measure is 68%.



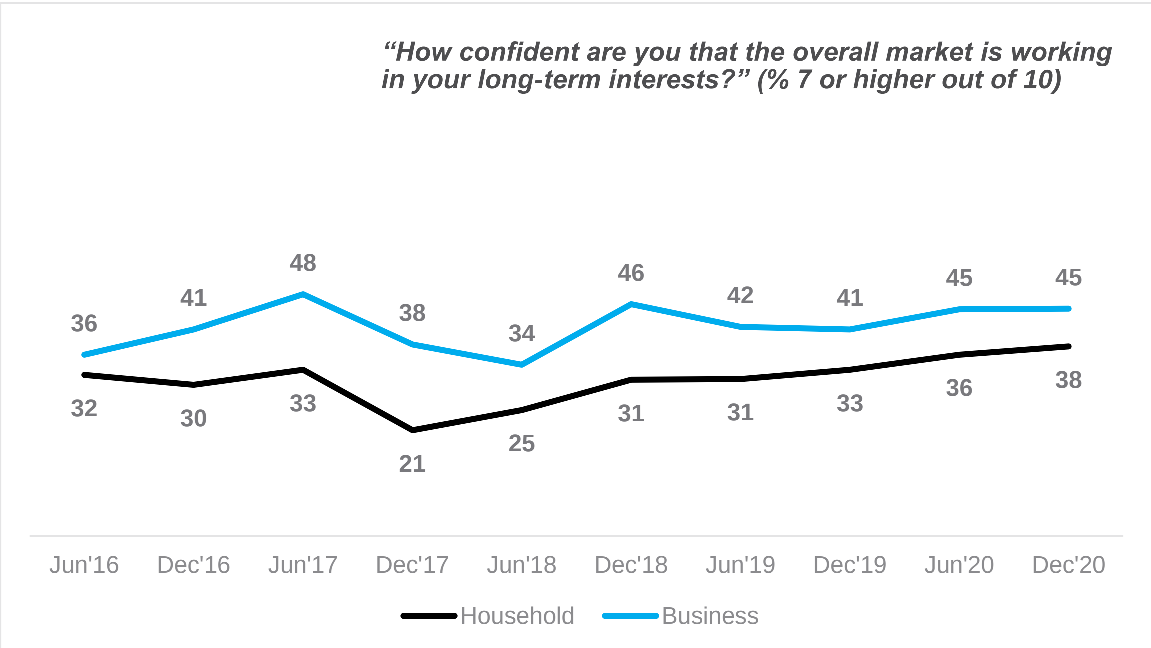
Base: All Household (n=2,192) & Business consumers (n=523)

Consumers' confidence in the availability of easily understood information has trended up since December 2017, while confidence among small businesses has decreased since the last survey to 58% (down 5%) after a period of improvement over the past three years.



Base: All Household (n=2,192) & Business consumers (n=523)

Household consumers' confidence that the energy market is working in their long-term interests has continued to increase steadily from a low base of 21% in December 2017 and is now at 38%. Confidence among small businesses is at 45%.



Base: All Household (n=2,192) & Business consumers (n=523)

National findings

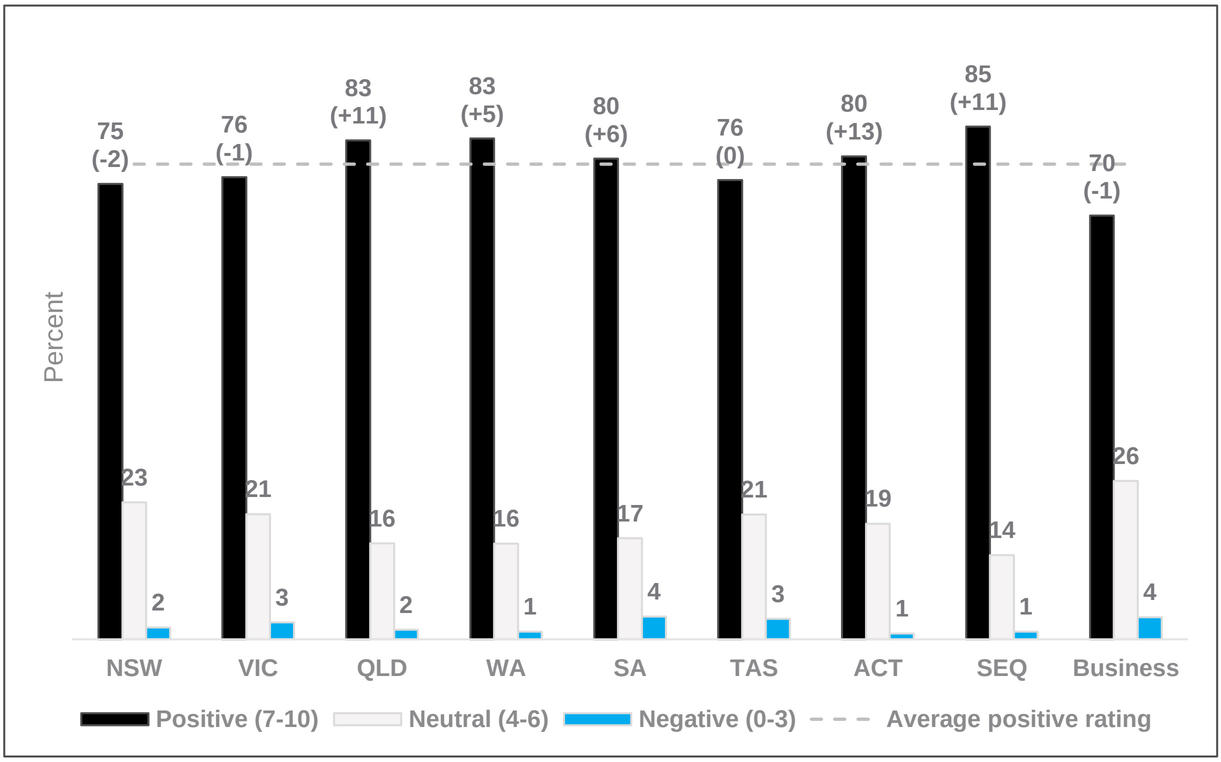
Overall satisfaction

Overall satisfaction with the provision of electricity and gas services is up in some states and territories.

- The largest increases among households are in the Australian Capital Territory (up 13% to 80%) and Queensland (up 11% to 83%).
- There has also been an increase in overall satisfaction in Western Australia (up 5% to 83%) and South Australia (up 6% to 80%).

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'



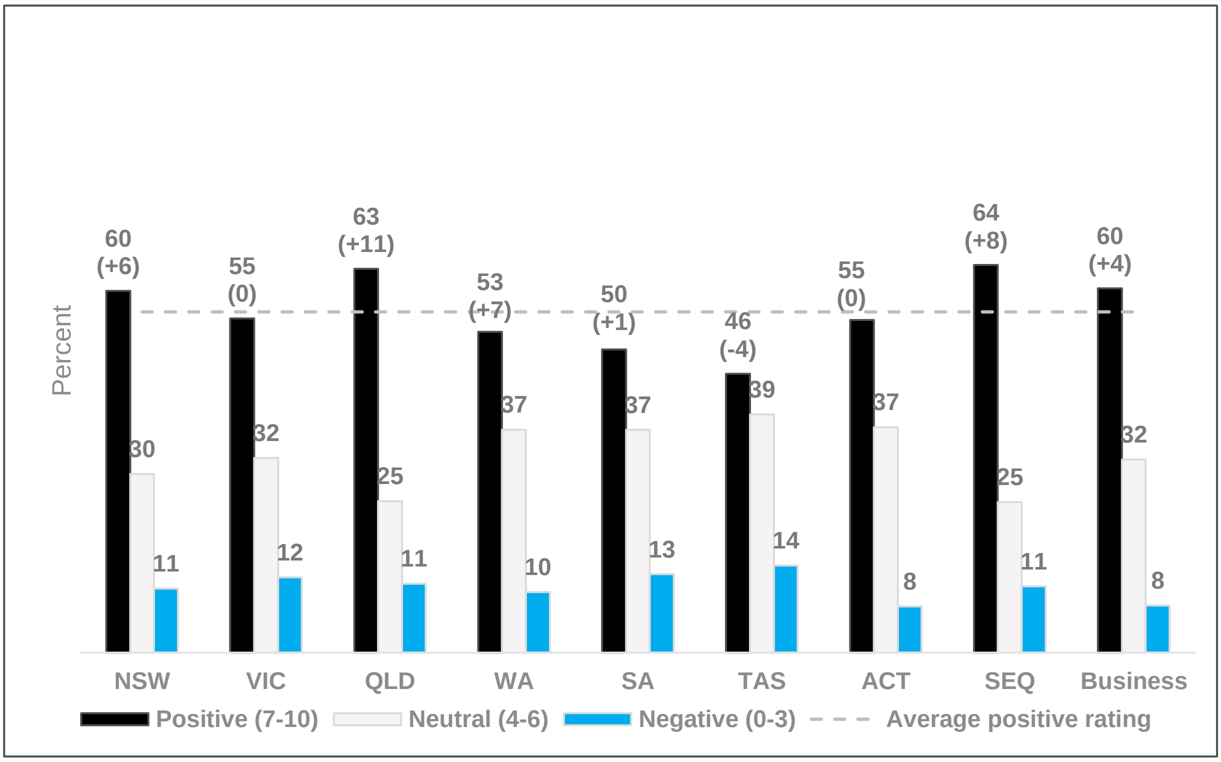
Base: Household consumers (n=2,192), Small business consumers (n=523)

Overall value for money (Electricity)

Households in most states rate the value for money of the products and services provided by their electricity company higher than they did last year.

- The largest increase in overall value for money was in Queensland (up 11% to 63%), with South East Queensland up 8% to 64%.
- New South Wales (up 6% to 60%) and Western Australia (up 7% to 53%) also recorded improved results.

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=2,192), Small business consumers (n=523)

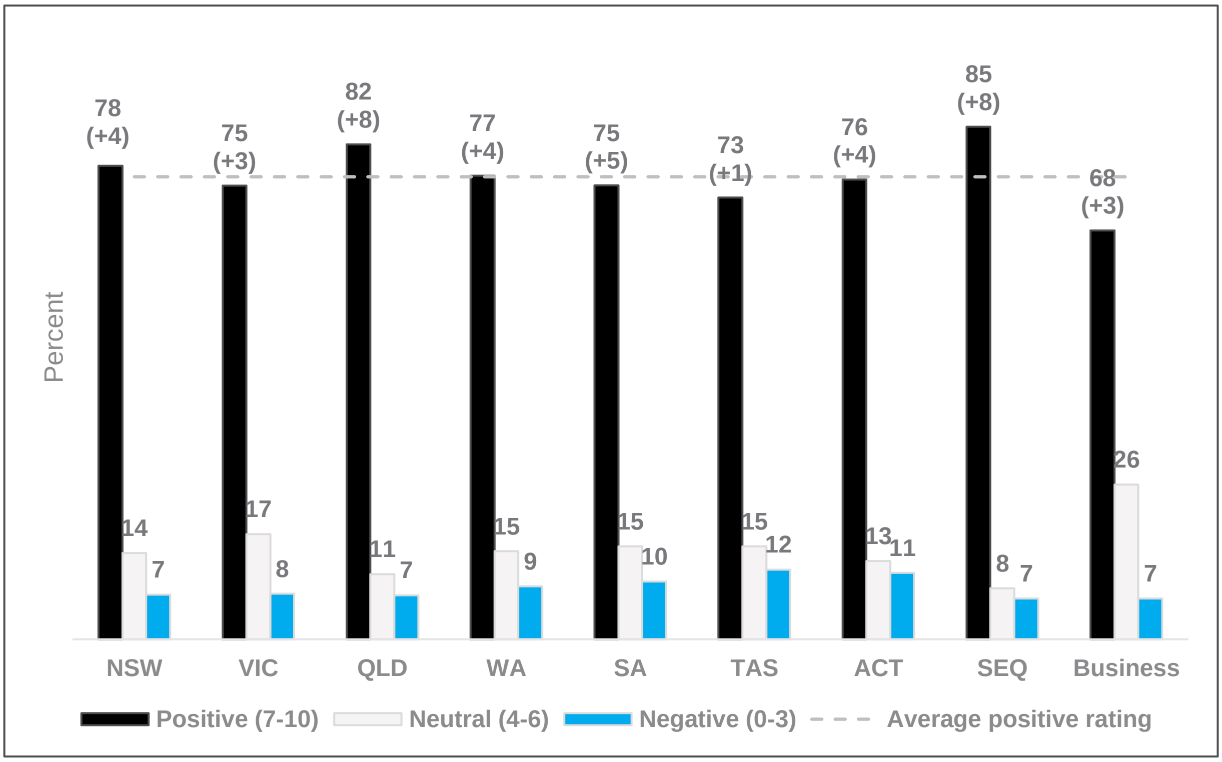
Reliability (Electricity)

We saw increasingly high levels of satisfaction with the reliability of electricity supply in all markets.

- The largest increases in satisfaction over the past year are in Queensland (up 8% to 82%) and South East Queensland (up 8% to 85%).
- There was further improvement in the level of satisfaction among South Australian household consumers with 75% now satisfied with the reliability of their electricity supply (up 5%).

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

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



Base: Household consumers (n=2,192), Small business consumers (n=523)

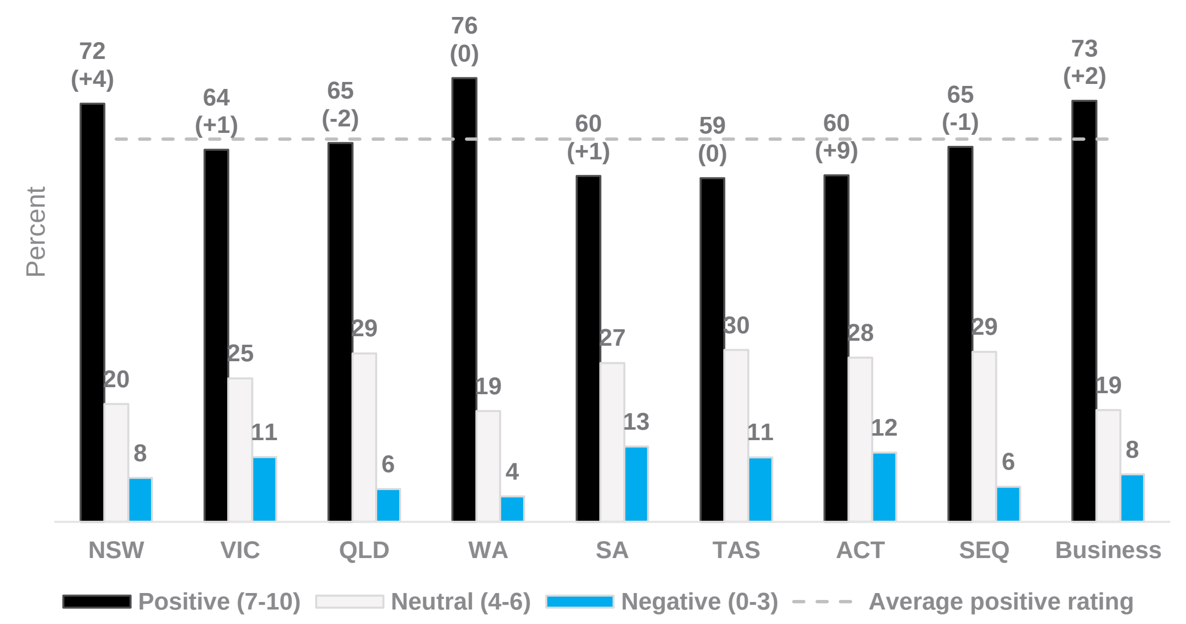
Overall value for money (Gas)

Ratings for the value for money of gas are generally similar to last year.

- Household consumers in the Australian Capital Territory reported a improvement in the value for money from their gas service compared to last year (up 9% to 60%).
- Consumers in other states and territories recorded no or little change in the level of value for money from their gas company.

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 gas consumers (n=1,434), Small business gas consumers (n=345)

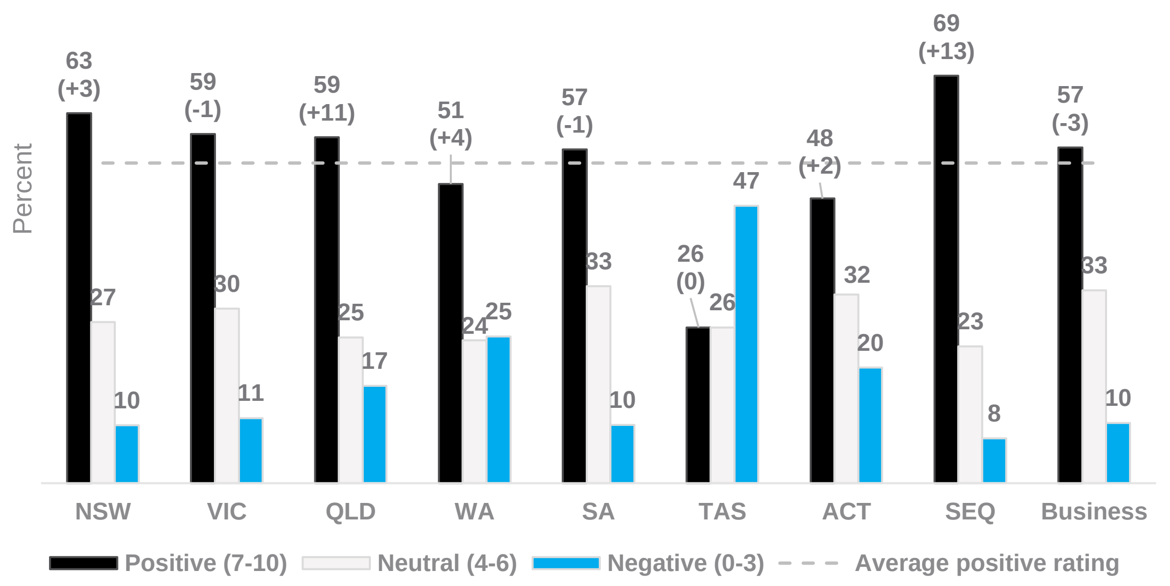
*Note: Small sample sizes for Tasmania (n=54) and South East Queensland (n=99).

Level of competition

Queenslanders are more satisfied with the level of competition in their energy market.

- South East Queensland has the highest level of satisfaction with competition in the country (69%, up 13%), pushing the overall Queensland outcome to 59% (up 11%).
- In Tasmania, which saw a new retailer enter the market in February 2019, satisfaction with the level of competition has remained consistent at 26% after an increase of 19% reported in the December 2019 survey.

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=2,192), Small business consumers (n=523)

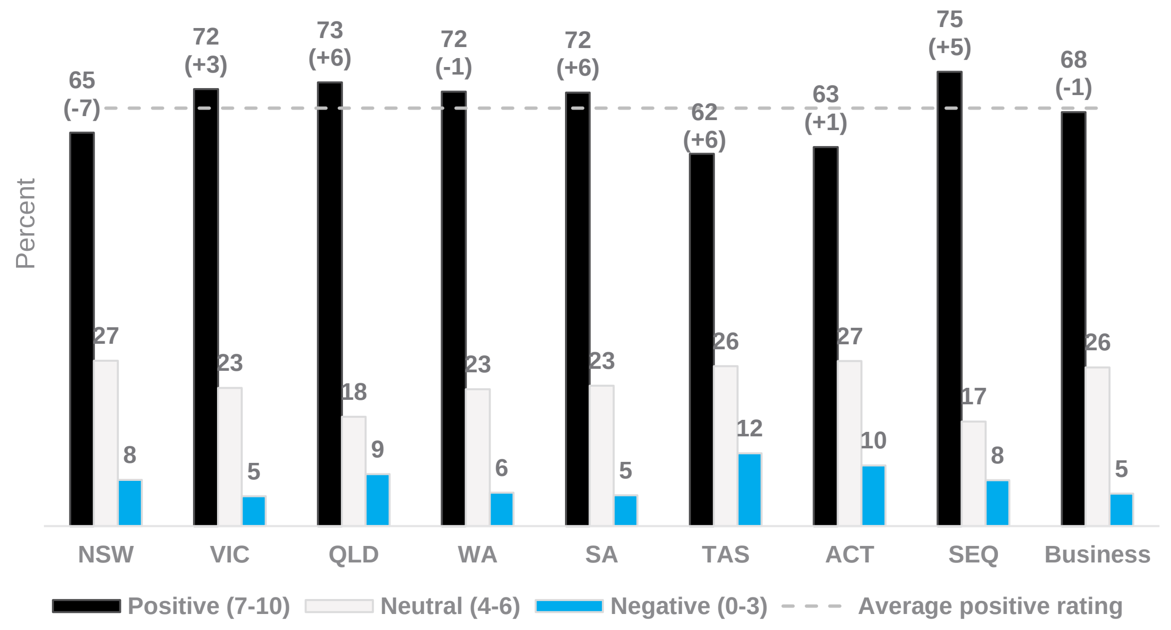
Consumer confidence in their abilities

Consumers' confidence in their own ability to make choices about energy products and services remains high.

- Confidence has increased the most in Queensland (up 6% to 73%), South Australia (up 6% to 72%) and Tasmania (up 6% to 62%).
- Confidence has decreased in New South Wales (down 7% to 65%).

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=2,192), Small business consumers (n=523)

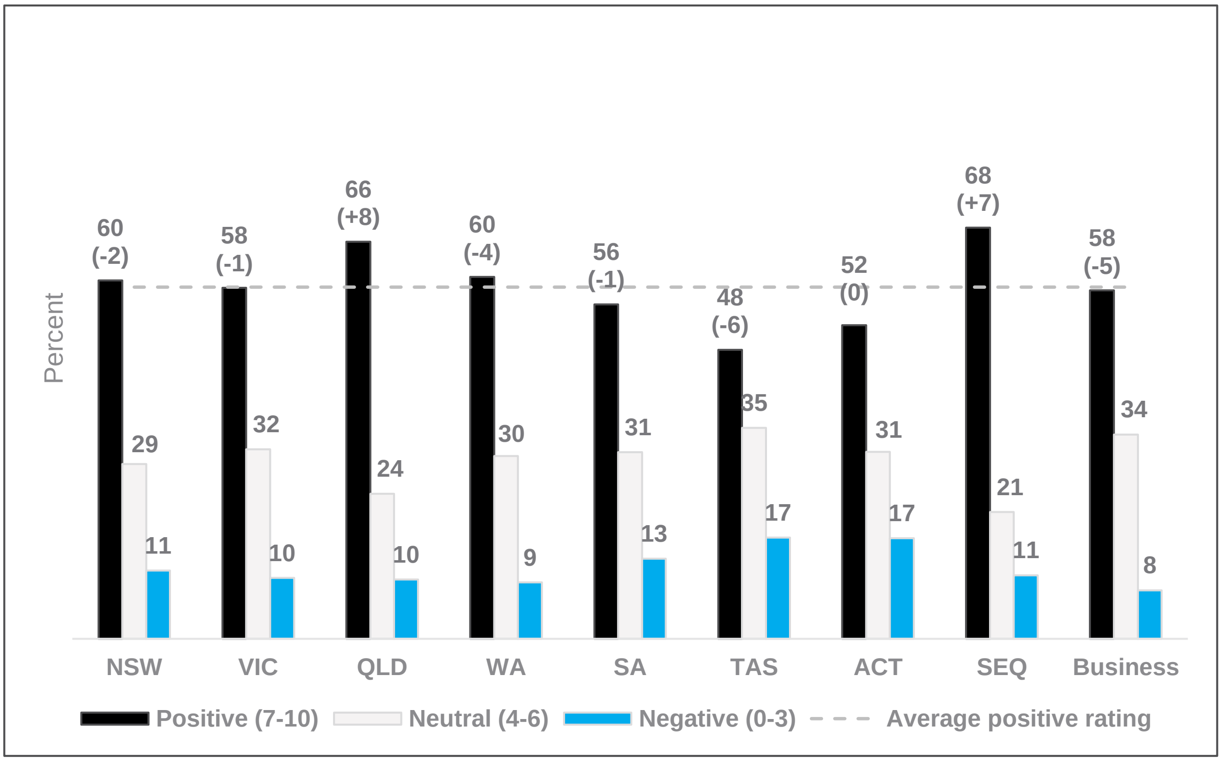
Confidence in the availability of information

Consumer confidence that there is enough easily understood information available to make decisions about energy products and services has increased in Queensland but dropped or remained similar elsewhere.

- Household consumers' confidence that there is enough information has increased in Queensland by 8% (to 66%), but fell in most other states, with the largest drop in Tasmania (down 6% to 48%).
- Small business consumers' confidence in the level of easily understood information also fell by 5% (to 58%).

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=2,192), Small business consumers (n=523)

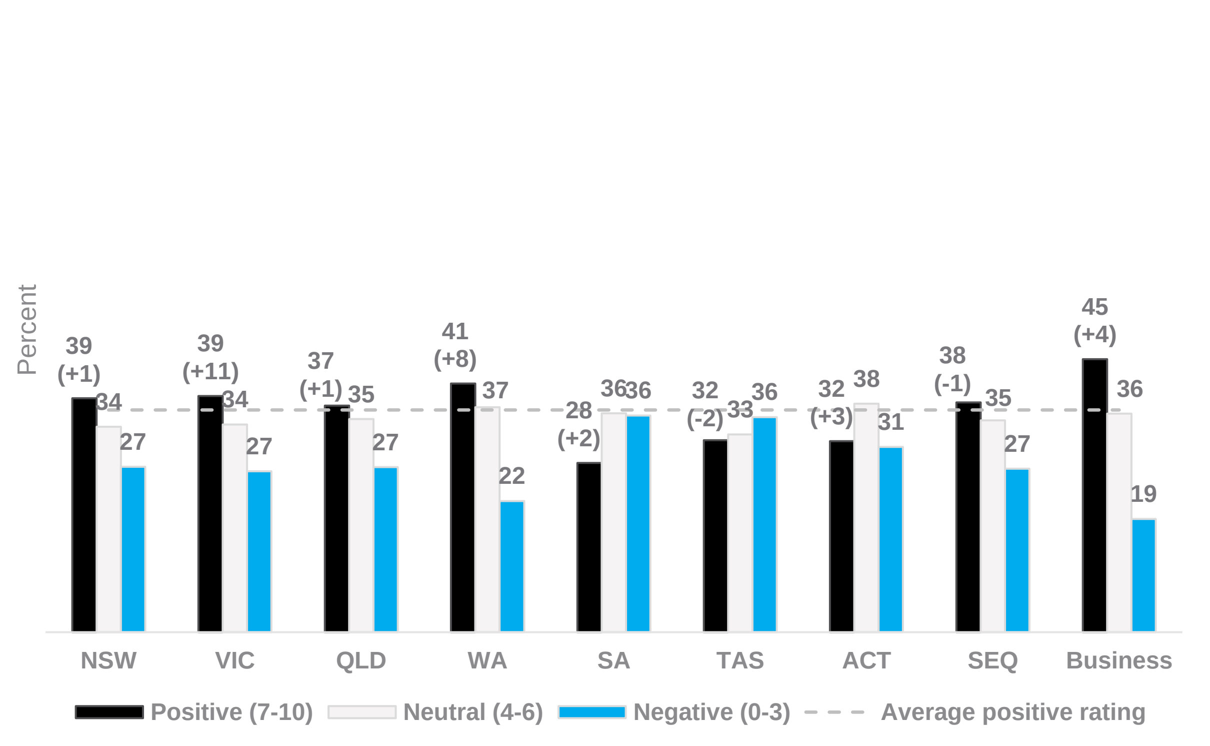
Confidence in the market

Consumer confidence that the energy market is working in their long-term interests continues to increase in all markets except for Tasmania and South East Queensland but remains low compared to other confidence measures.

- The largest increases for this measure are in Victoria (up 11% to 39%) and Western Australia (up 8% to 41%).
- Small business consumers are more confident than households, with 45% of small businesses confident that the market is working in their long-term interests (up 4%).

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=2,192), Small business consumers (n=523)

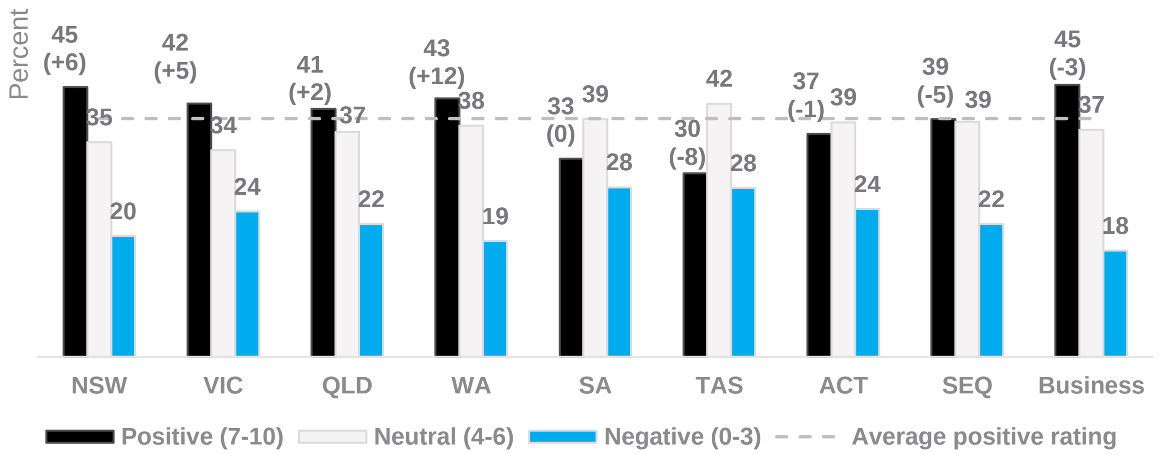
Confidence in future value for money

Consumers in some states are now more confident that the market is working in their interests in the long-term, but no jurisdiction has reached 50%.

- Confidence that the energy market will provide better value for money in the next five years increased in Western Australia (up 12% to 43%), New South Wales (up 6% to 45%) and Victoria (up 5% to 42%).
- Confidence has fallen the most in Tasmania (down 8% to 30%) and South East Queensland (down 5% to 39%).

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=2,192), Small business consumers (n=523)

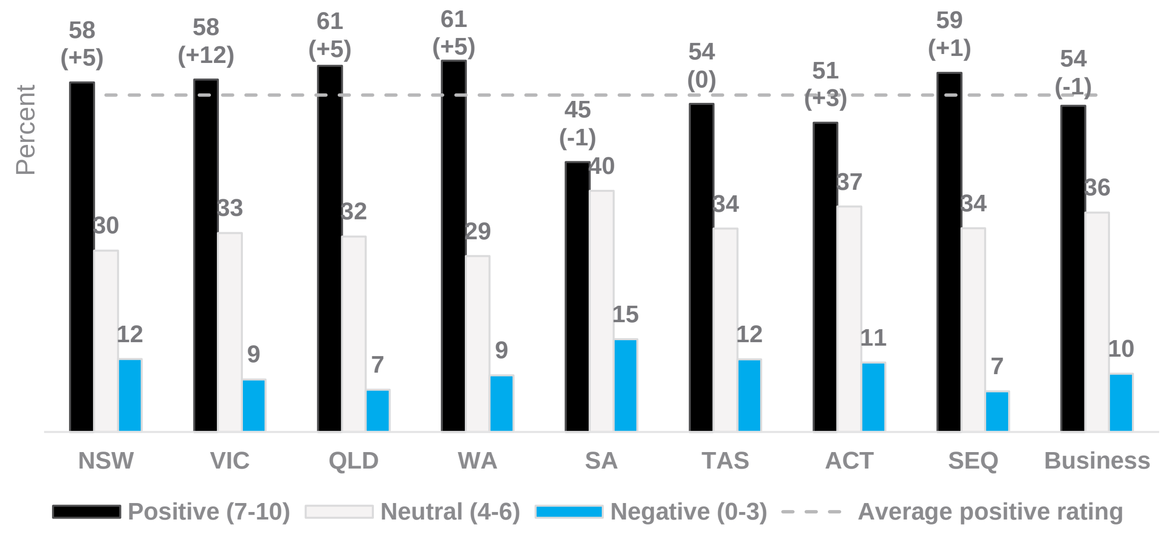
Confidence in future reliability

There is greater confidence that the market will deliver increased reliability.

- Victoria has recorded the greatest increase in confidence that reliability will improve (up 12% to 58%), followed by NSW (up 5% to 58%), Queensland (up 5% to 61%) and Western Australia (up 5% to 61%).
- Confidence in future reliability is lowest in South Australia, with 45% of household consumers saying they are confident.

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'



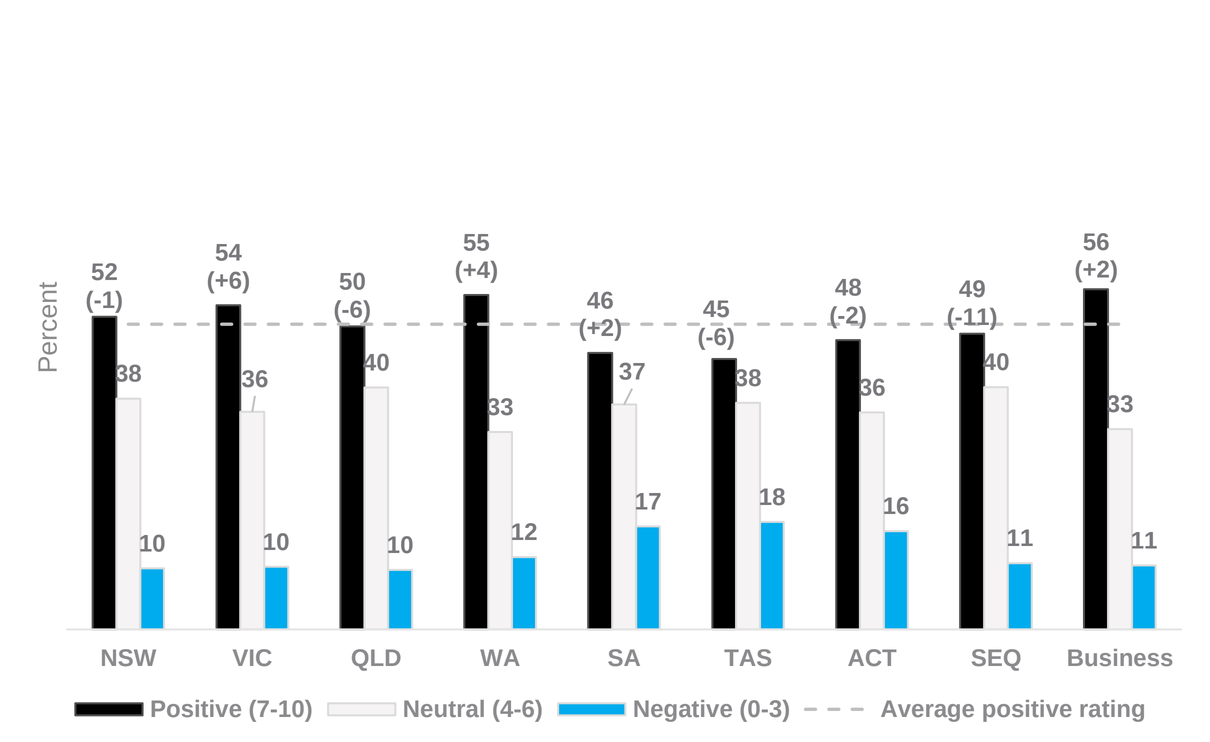
Base: Household consumers (n=2,192), Small business consumers (n=523)

Confidence in future technology

Consumer confidence that the market will deliver technological advances to manage energy supply and costs is up in some jurisdictions and down in others, with Queensland recording the largest falls.

- Confidence decreased in South East Queensland (down 11% to 49%), driving a decrease in Queensland overall (down 6% to 50%).
- Households in Tasmania are also less confident in the technological advances in the energy market (down 6% to 45%).
- Victoria saw the largest increase in confidence (up 6% to 54%).

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? (%)



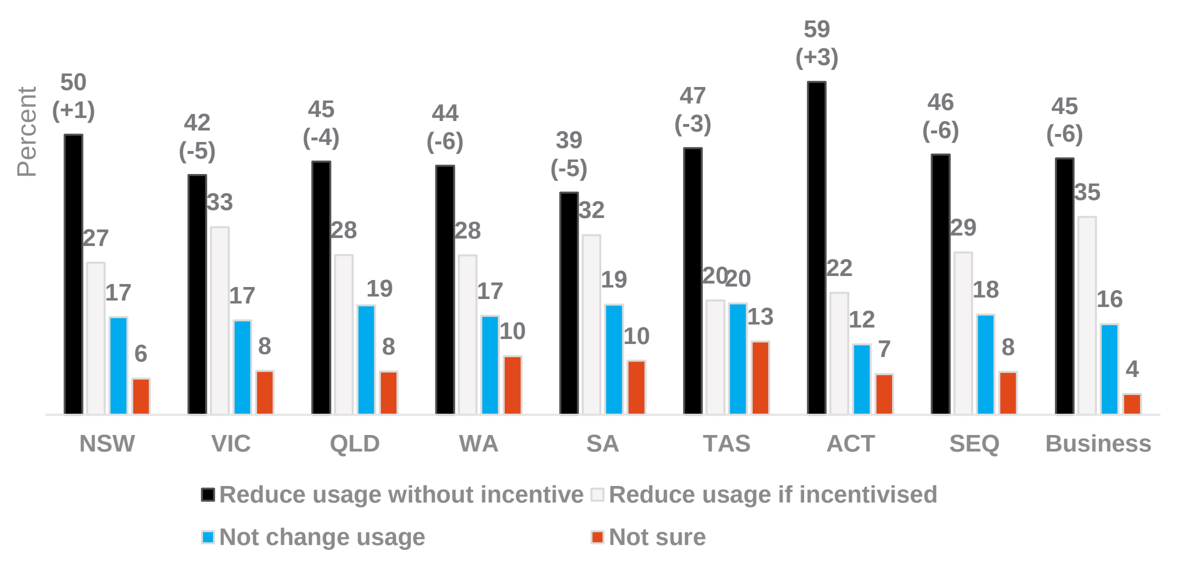
Base: Household consumers (n=2,192), Small business consumers (n=523)

Energy use reduction campaigns

Most consumers are prepared to reduce energy use during periods of very high demand, but households have become less likely to do this without incentives in most jurisdictions.

- Households are now less willing to reduce their energy use without an incentive in Western Australia (down 6% to 44%), South East Queensland (down 6% to 46%), South Australia (down 5% to 39%) and Victoria (down 5% to 42%).
- Small businesses also indicated greater reluctance to reduce energy use without incentives (down 6% to 45%).
- Household consumers in ACT are the most likely to respond to a campaign to lower energy use, with over half (59%) willing to reduce usage without an incentive.
- Overall, about one third of household consumers (29%) would require an incentive to reduce their energy use during periods of very high demand and 35% of small businesses would also require an incentive.

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



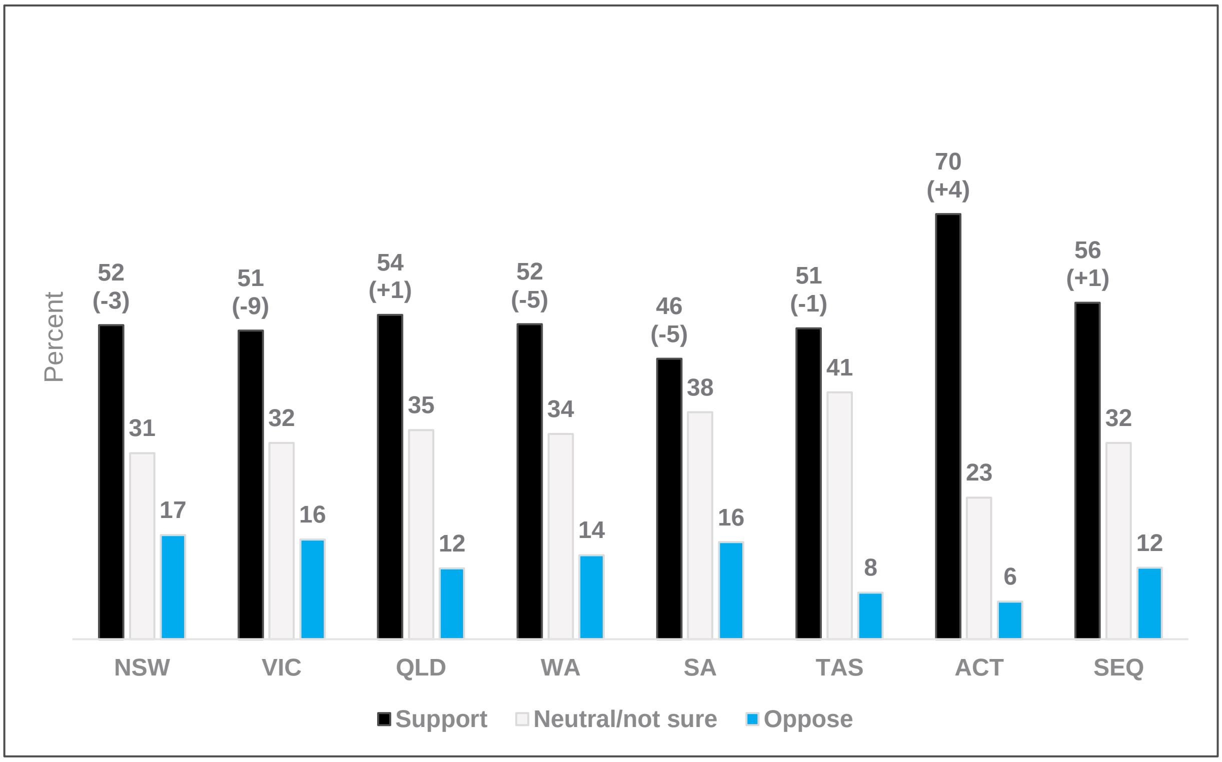
Base: Household consumers (n=2,192), Small business consumers (n=523)

Mandatory labelling schemes

A majority of households support a mandatory energy efficiency labelling scheme for houses.

- Apart from South Australia (46%, down 5%), more than half of households in all states support the introduction of a labelling scheme for houses.
- The ACT has greater support on this measure than any other state at 70%.
- While over half of all households still support this measure, support has eased in the past year, with the largest decreases in support in Victoria (down 9% to 51%), Western Australia (down 5% to 52%), and South Australia (down 5% to 46%).
- It remains the case that very few people oppose the idea of a mandatory energy efficiency labelling scheme, ranging from 6% in the ACT, to 17% in New South Wales.

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 (%)



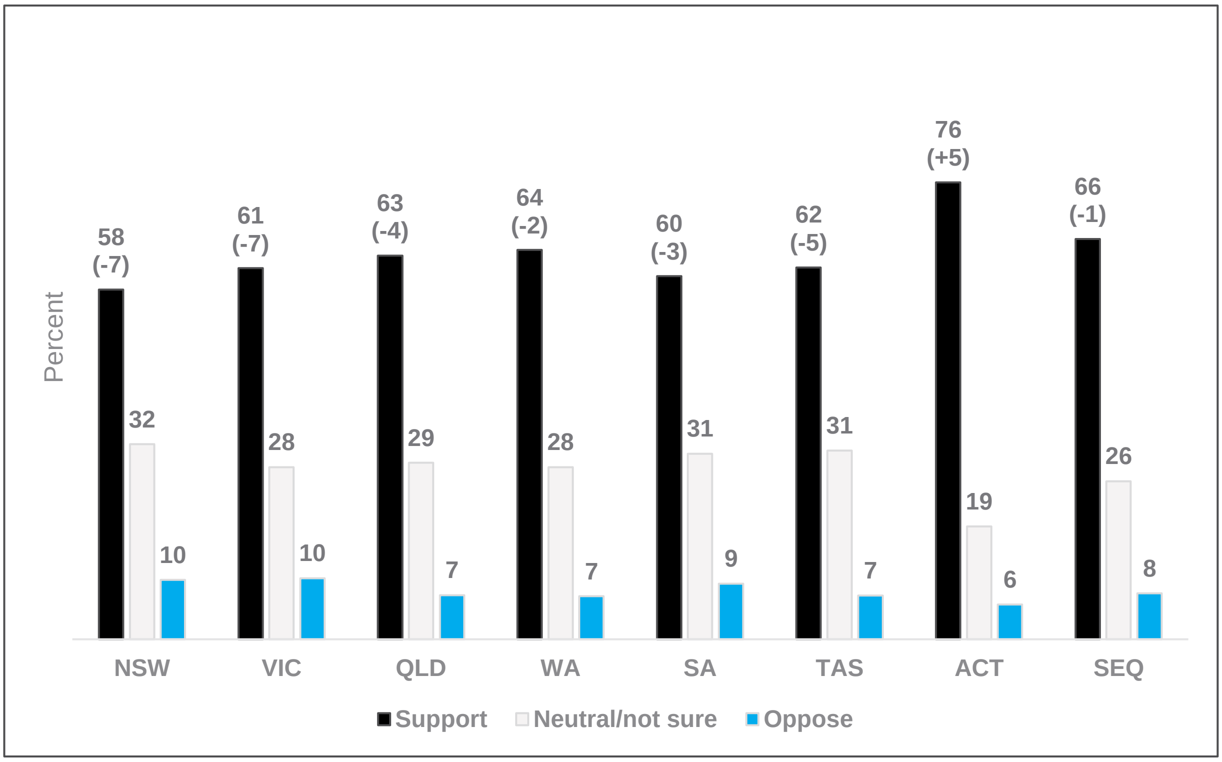
Base: Household consumers (n=2,192)

Minimum efficiency standards

While there is still support for minimum energy efficiency standards for rental properties across all markets, the level of support has eased.

- Overall support from renters is now at 68%, 10% higher than among homeowners (58%).
- The largest decrease in support is in New South Wales (down 7% to 58%) and Victoria (down 7% to 61%).
- The only market where support has increased is the ACT (up 5% to 76%).
- Of those who do not support the initiative, most are neutral or unsure – no more than 1 in 10 would 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 (%)



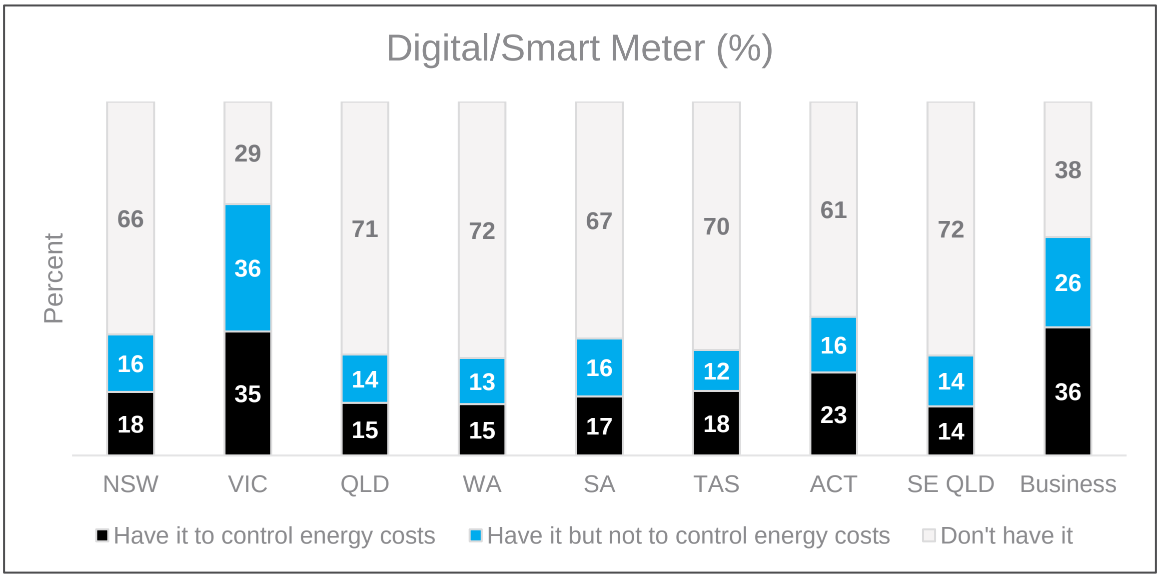
Base: Household consumers (n=2,192)

Technology to control energy costs

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

- In Victoria, smart meters were rolled out through a State Government program, but only 71% of household consumers report having one and just 35% say that they use it to control energy costs.
- Small businesses also report a relatively high uptake of smart meters (62%) with 36% saying they use the device to manage their energy costs.
- In other states and territories, between 28% (Western Australia and South East Queensland) and 39% (the ACT) report having a smart meter. Again, around half of households who have the device use it to manage energy costs.

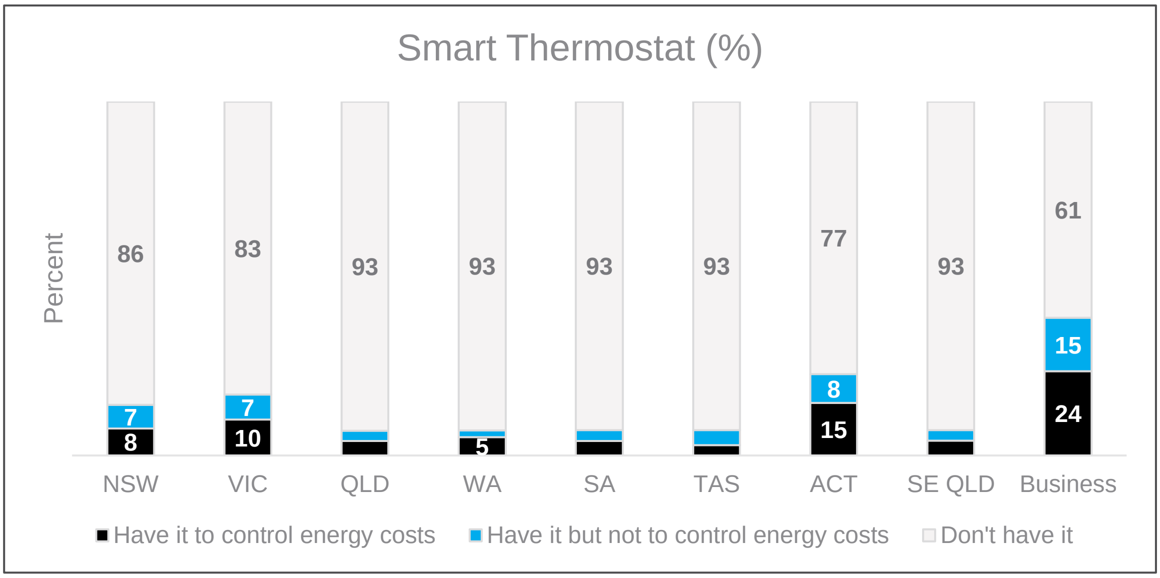
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

- Fewer than 2 in 10 households say they own a smart thermostat (with ACT being the exception at 23% ownership), compared to 39% of small businesses.

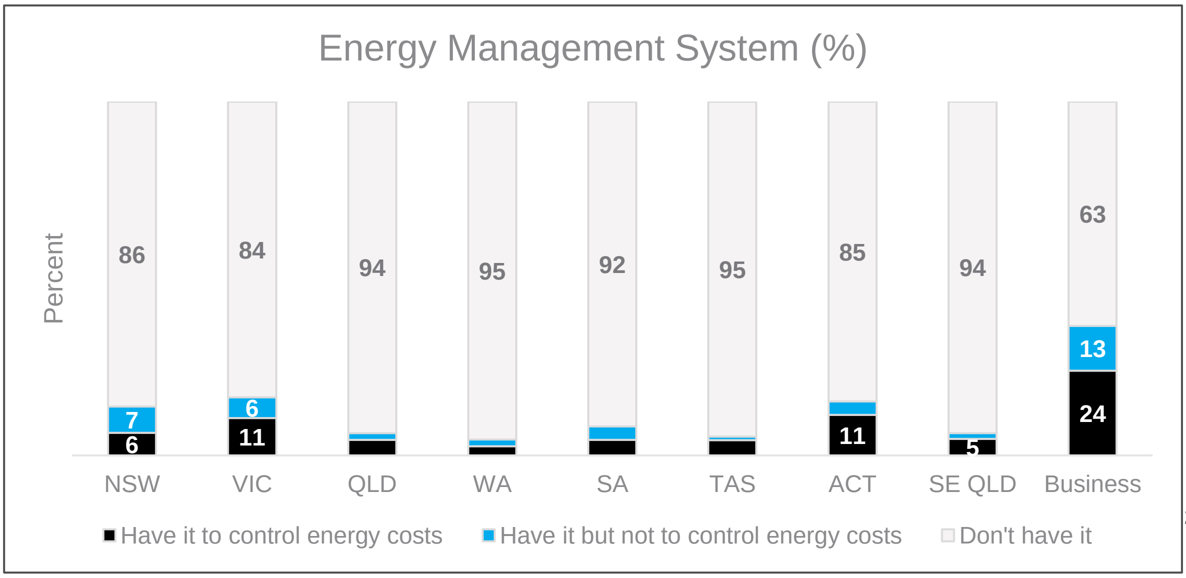
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

- 37% of small businesses say they have an energy management system, while uptake is less than 20% among households in all markets.

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? (%)



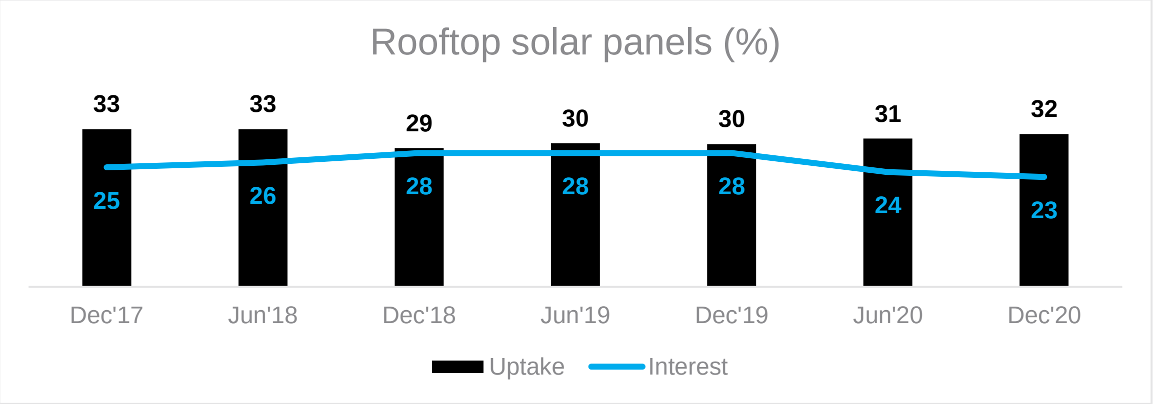
Base: Household consumers (n=2,192), Small business consumers (n=523)

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

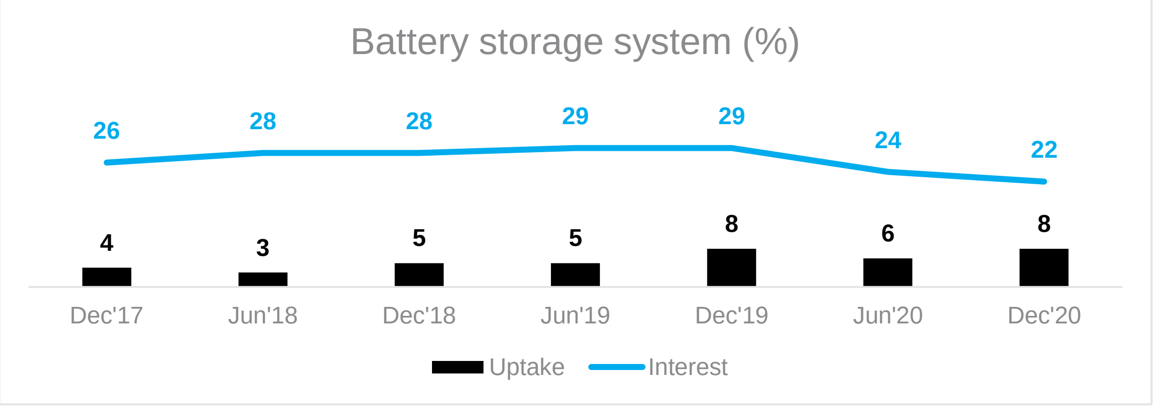
Uptake of energy efficient technologies

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.

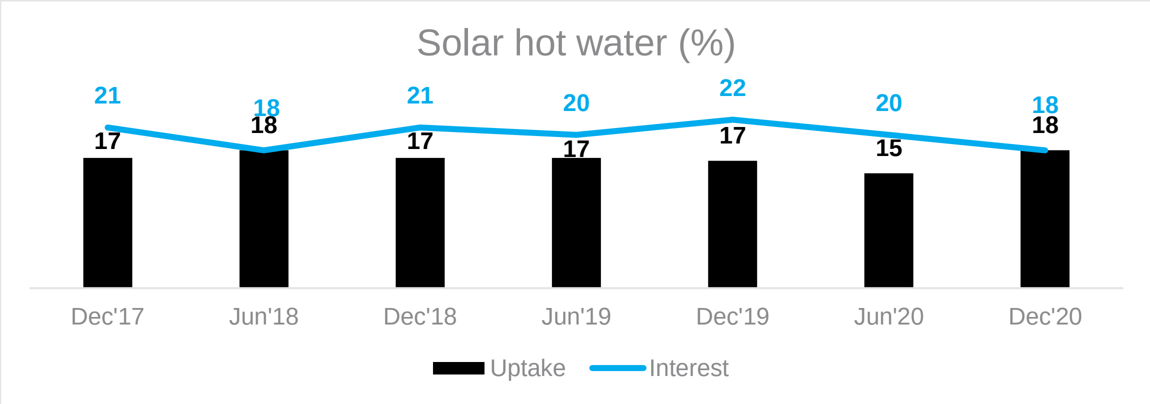
Figures are not included from earlier than December 2017 due to methodology changes. “Uptake” refers to consumers who have purchased this technology already. “Interest” is defined as those who do not own the technology yet but have expressed interest in purchasing it sometime in the future.



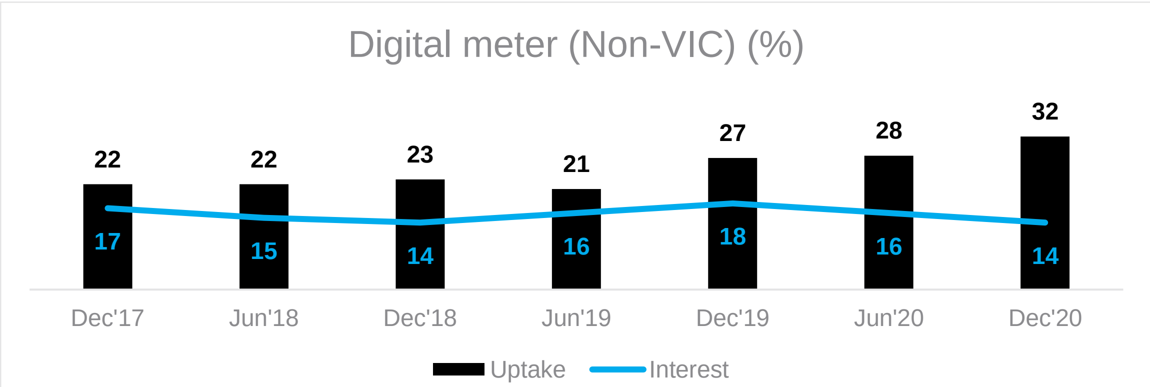
Uptake Base: All Household consumers (n=2,192)
Interest Base: All Household consumers which do not own product (n=1,463)



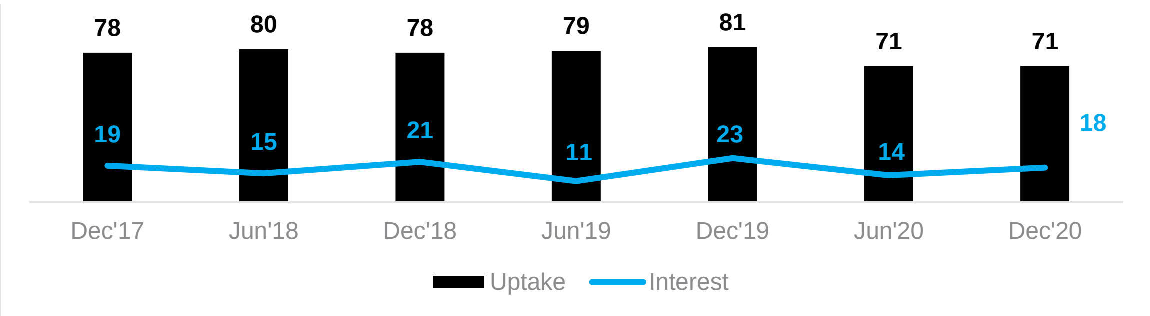
Uptake Base: All Household consumers (n=2,192)
Interest Base: All Household consumers who do not own product (2,027)



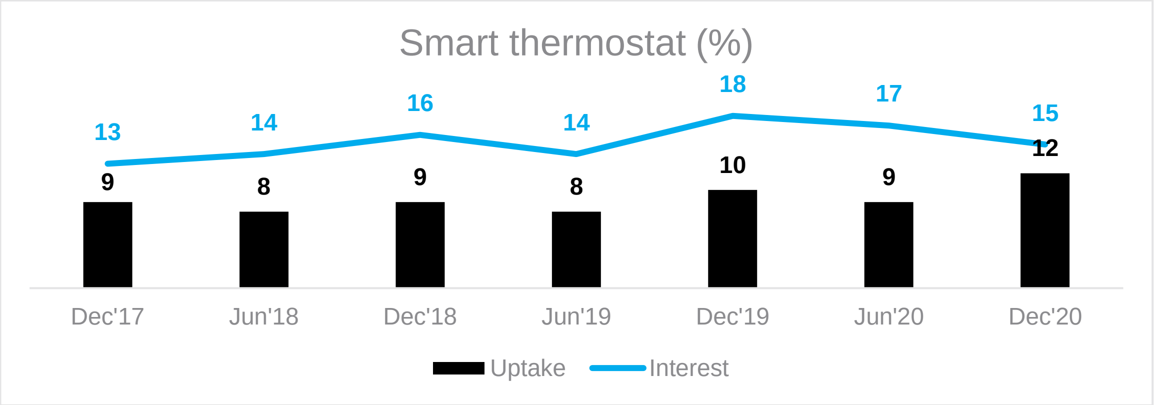
Uptake Base: All Household consumers (n=2,192)
Interest Base: All Household consumers who do not own product (n=1,824)



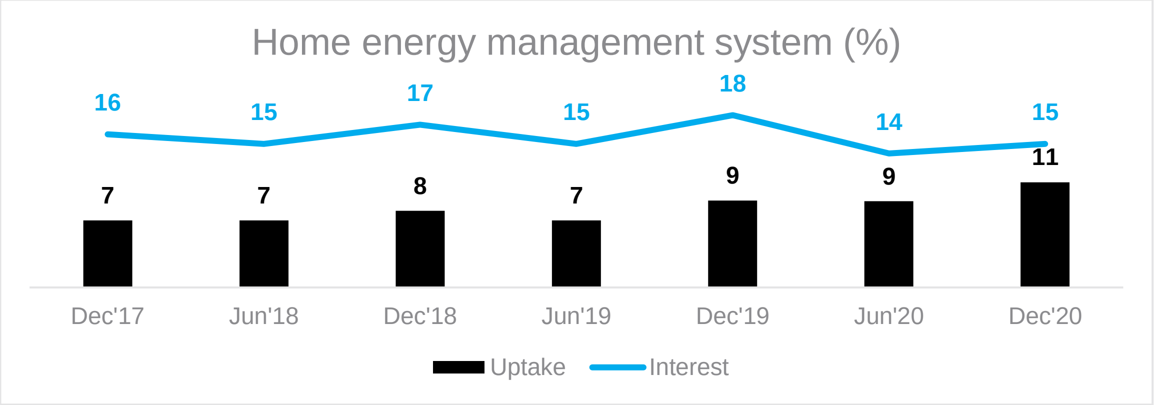
Uptake Base: All Household consumers not in Victoria (n=1,767)
Interest Base: All Household consumers not in Victoria who do not own product (n=1,205)



Uptake Base: All Household consumers in Victoria (n=425)
Interest Base: All Household consumers in Victoria who do not own product (n=123)



Uptake Base: All Household consumers (n=2,192)
Interest Base: All Household consumers who do not own product (n=1,930)



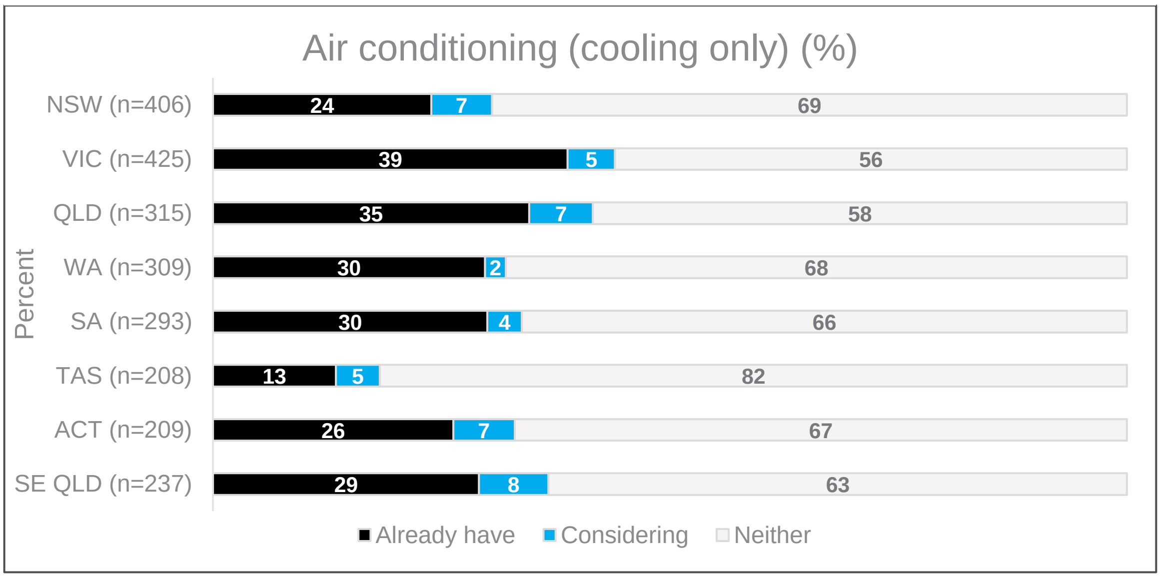
Uptake Base: All Household consumers (n=2,192)
Interest Base: All Household consumers who do not own product (n=1,961)

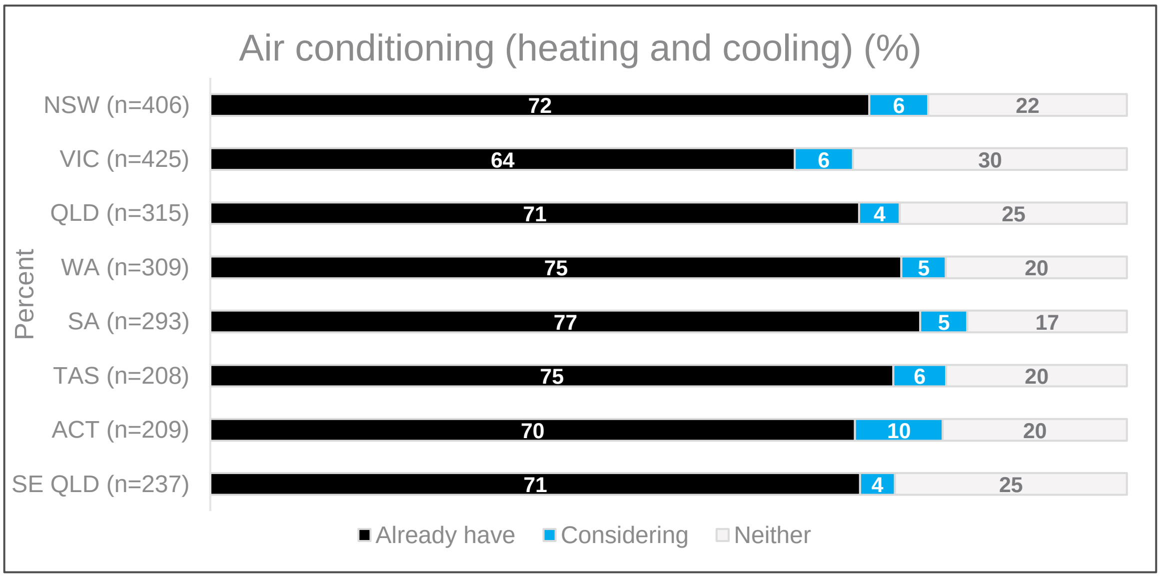
What investments are people considering

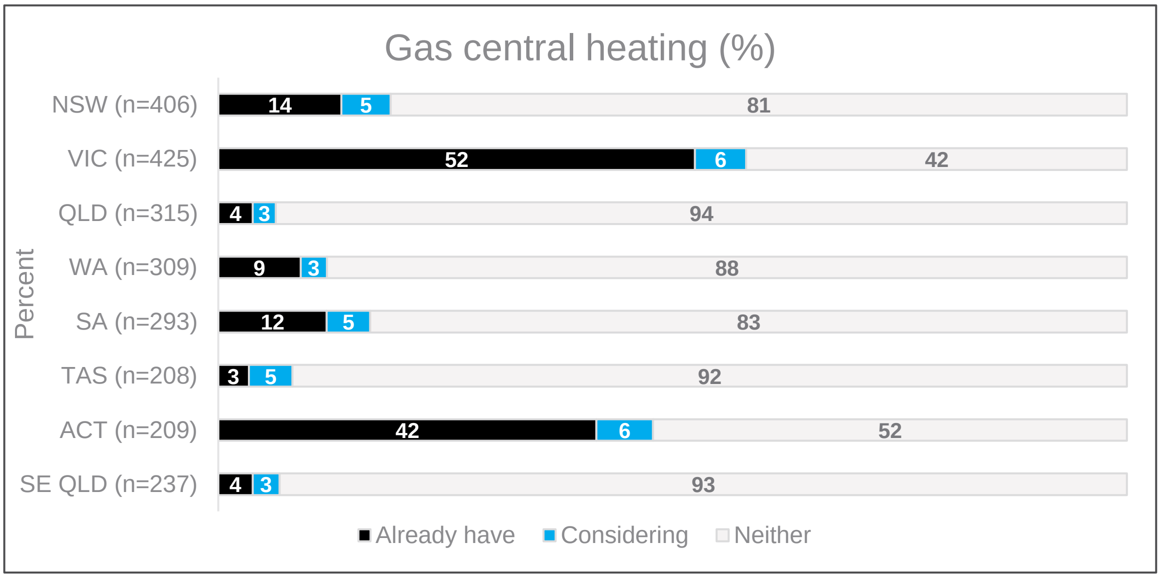
Which of the following technology do you have at your household? And which do you use to help control your energy costs? (%)

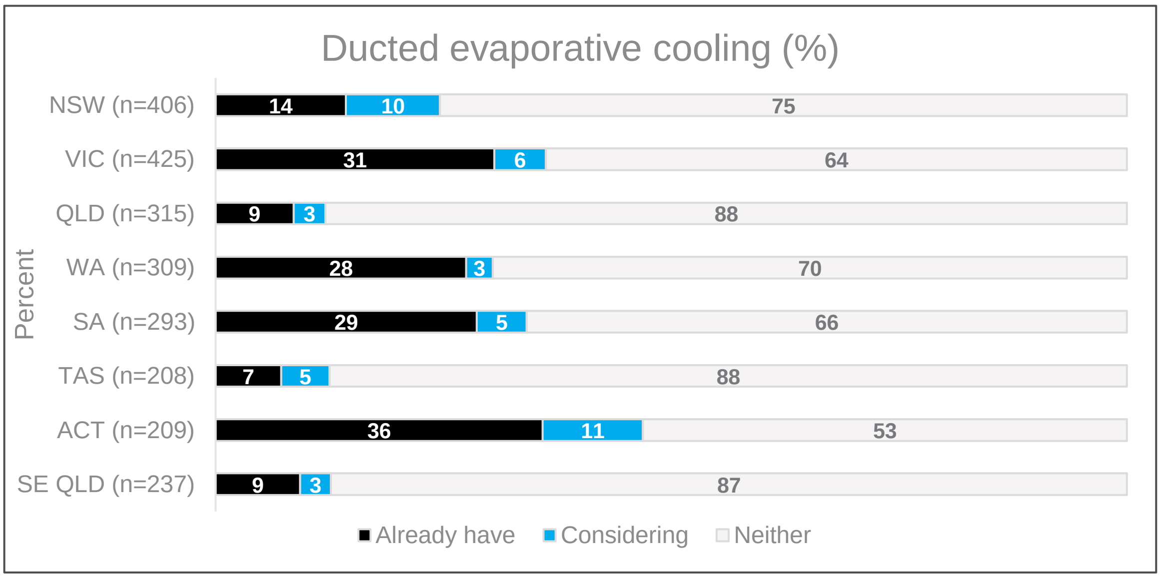
[If not] Which of the following are you intending to purchase for your home?

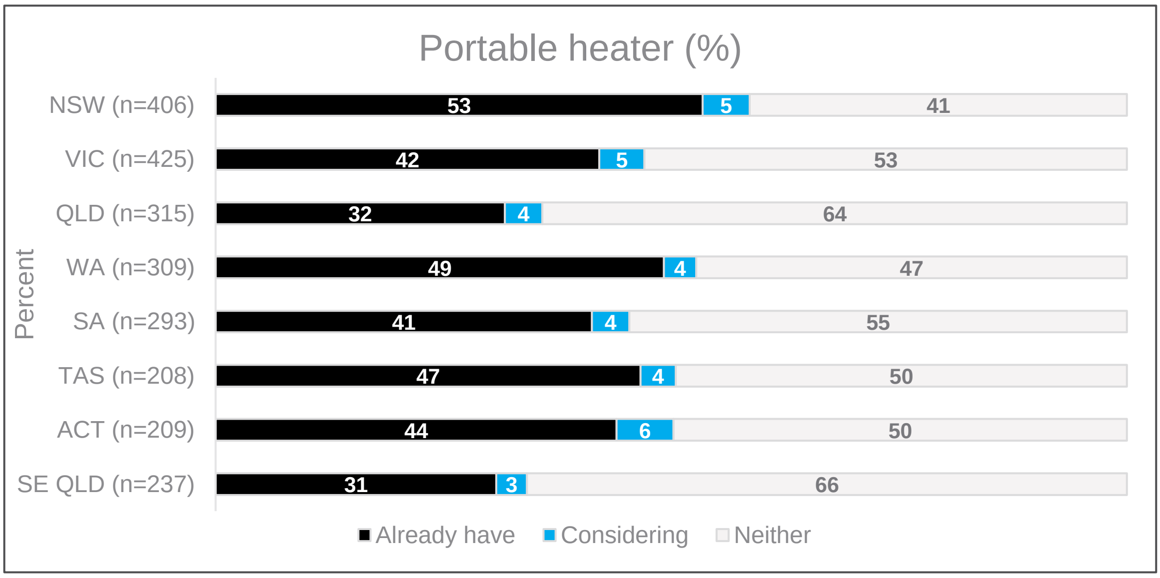
Base: Household consumers in each state

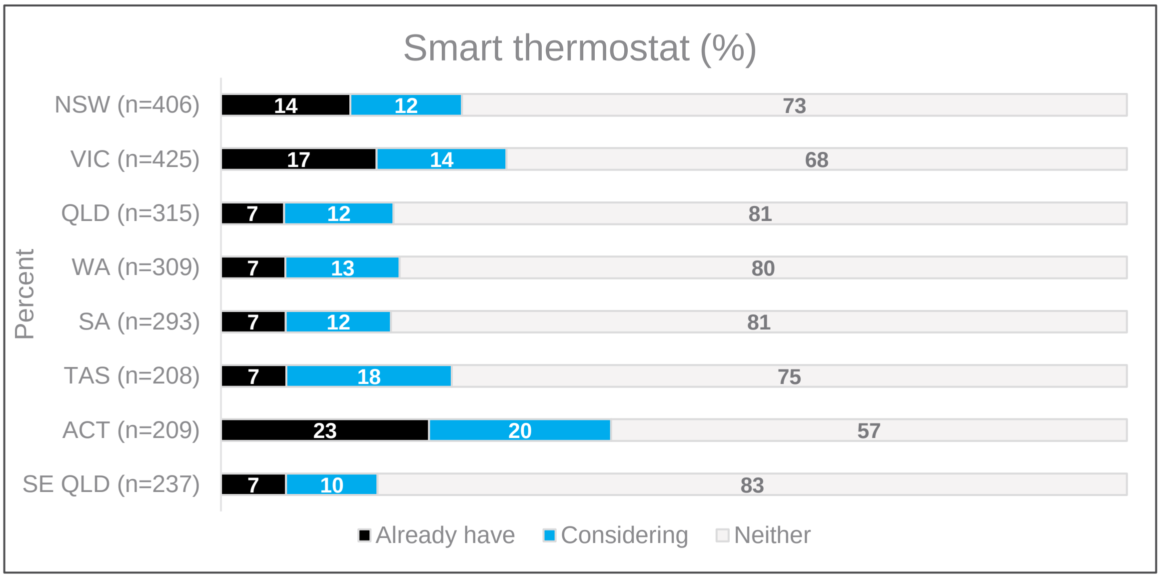


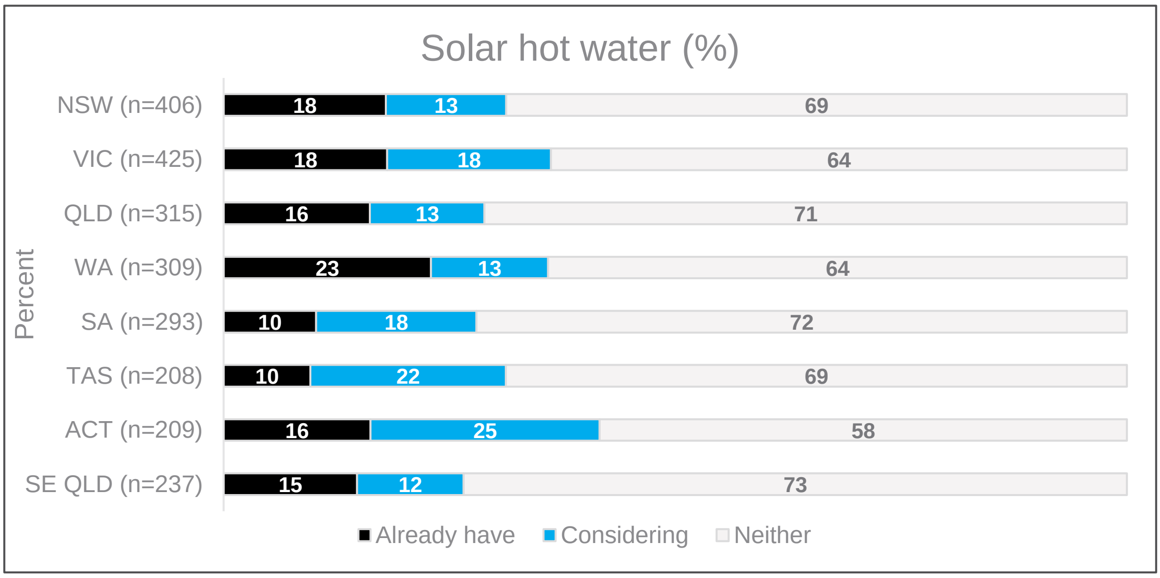


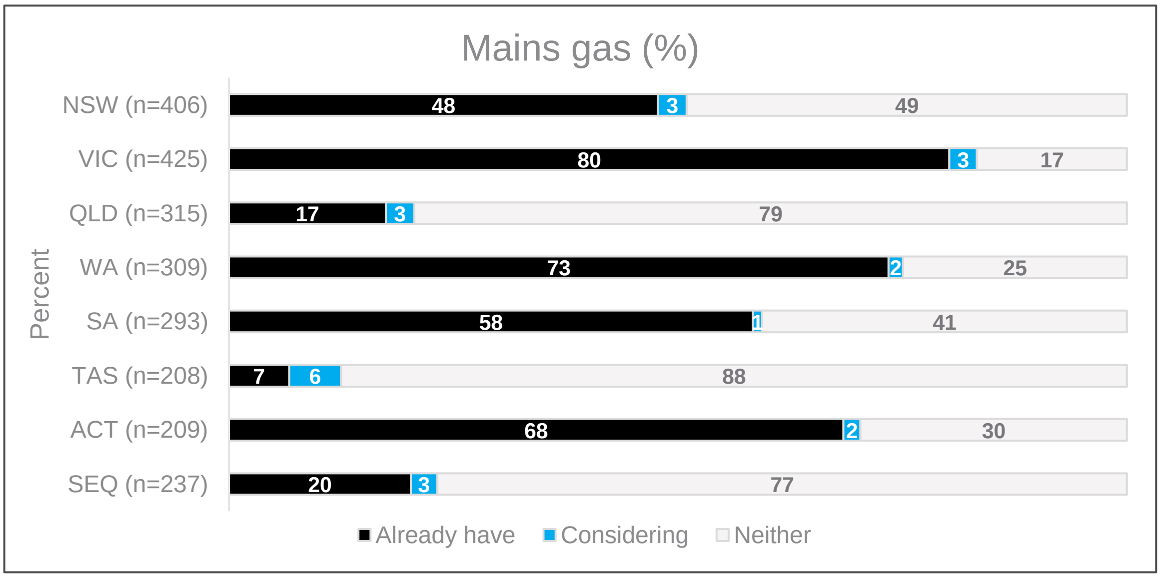

Gas central heating (%)
Percent
NSW (n=406) 14 5 81
VIC (n=425) 52 6 42
QLD (n=315) 4 3 94
WA (n=309) 9 3 88
SA (n=293) 12 5 83
TAS (n=208) 3 5 92
ACT (n=209) 42 6 52
SE QLD (n=237) 4 3 93
Already have
Considering
Neither

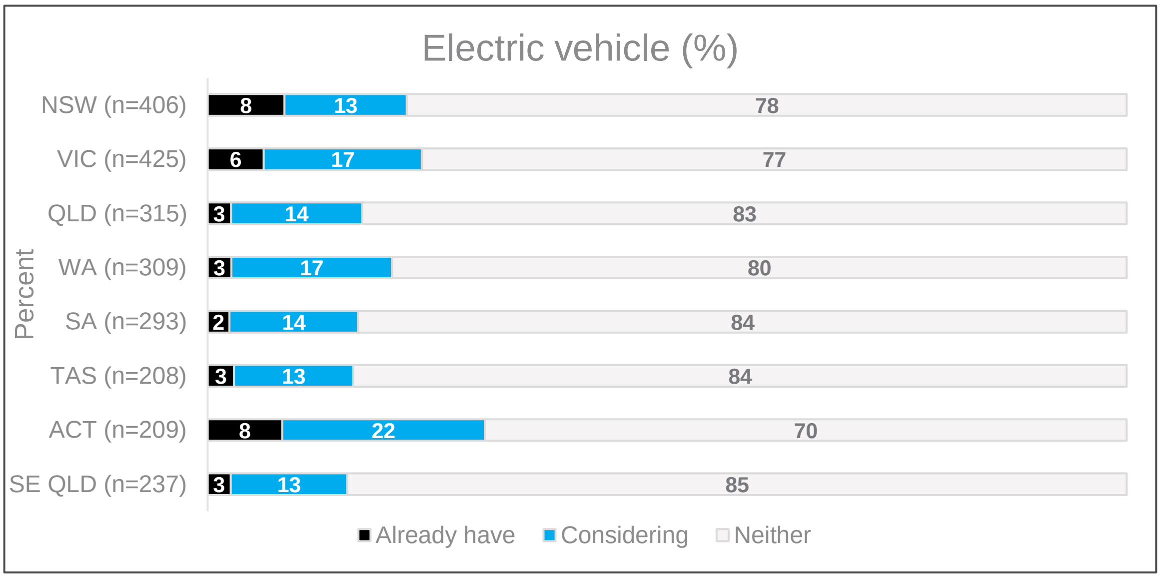

Ducted evaporative cooling (%)
Percent
NSW (n=406) 14 10 75
VIC (n=425) 31 6 64
QLD (n=315) 9 3 88
WA (n=309) 28 3 70
SA (n=293) 29 5 66
TAS (n=208) 7 5 88
ACT (n=209) 36 11 53
SE QLD (n=237) 9 3 87
Already have
Considering
Neither

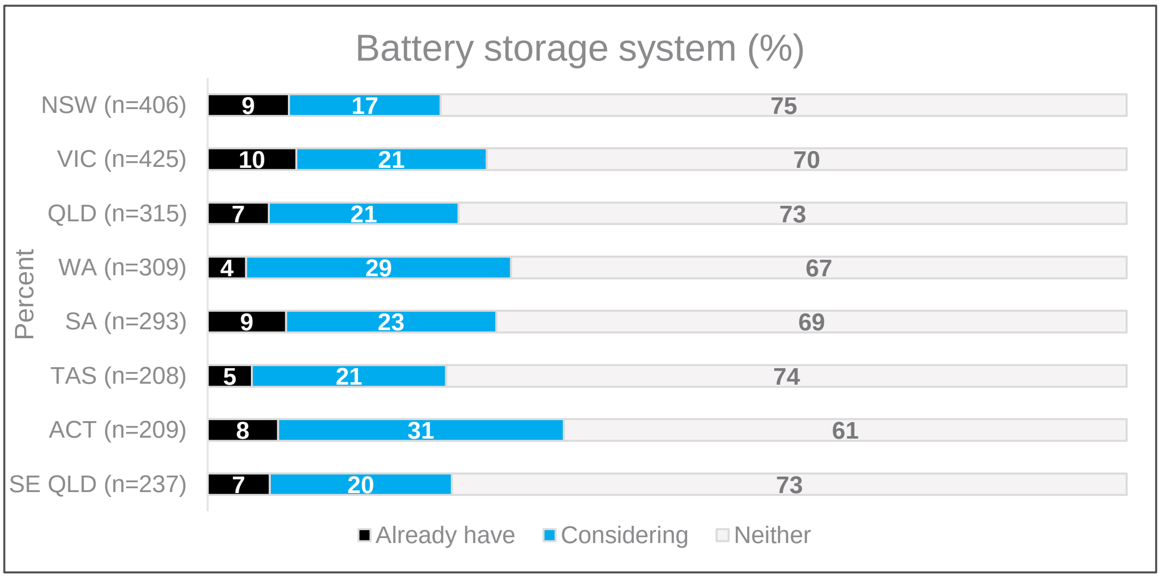

Portable heater (%)
Percent
NSW (n=406) 53 5 41
VIC (n=425) 42 5 53
QLD (n=315) 32 4 64
WA (n=309) 49 4 47
SA (n=293) 41 4 55
TAS (n=208) 47 4 50
ACT (n=209) 44 6 50
SE QLD (n=237) 31 3 66
Already have
Considering
Neither

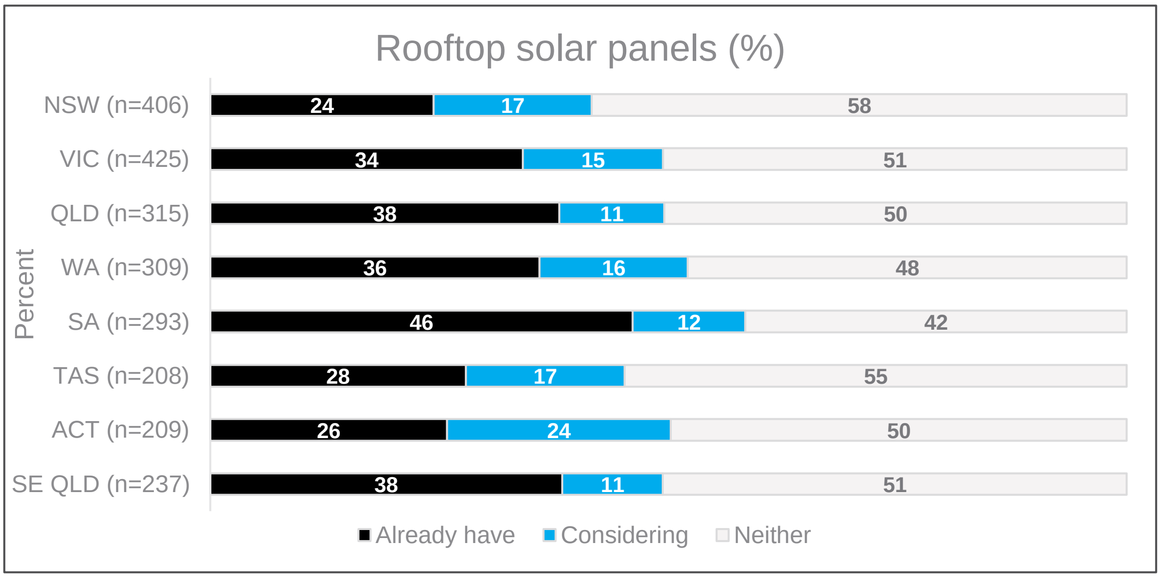

Smart thermostat (%)
Percent
NSW (n=406) 14 12 73
VIC (n=425) 17 14 68
QLD (n=315) 7 12 81
WA (n=309) 7 13 80
SA (n=293) 7 12 81
TAS (n=208) 7 18 75
ACT (n=209) 23 20 57
SE QLD (n=237) 7 10 83
Already have
Considering
Neither

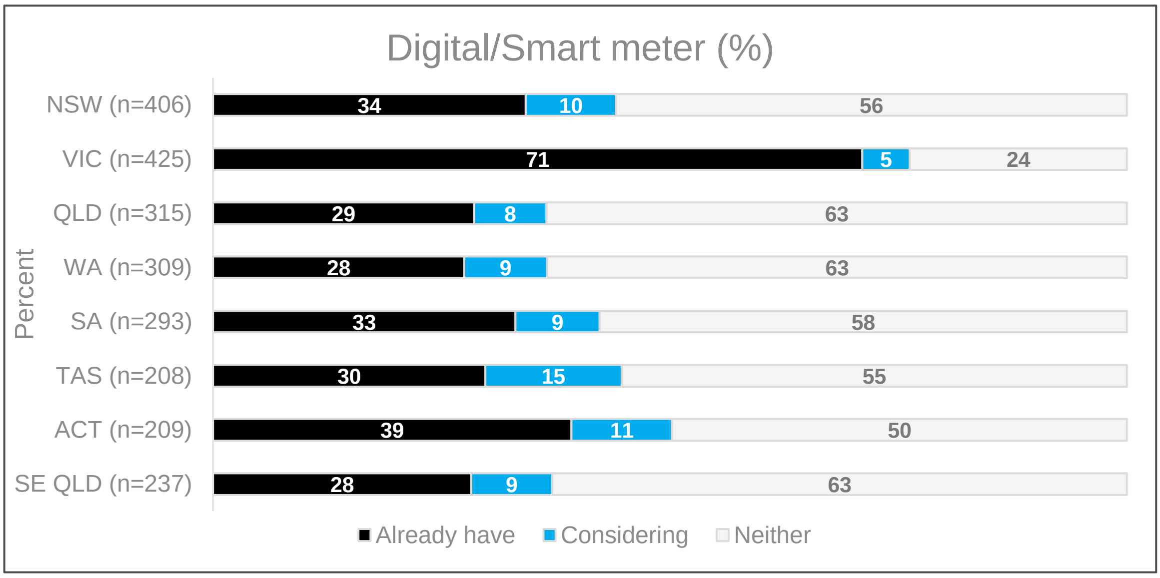

Solar hot water (%)
Percent
NSW (n=406) 18 13 69
VIC (n=425) 18 18 64
QLD (n=315) 16 13 71
WA (n=309) 23 13 64
SA (n=293) 10 18 72
TAS (n=208) 10 22 69
ACT (n=209) 16 25 58
SE QLD (n=237) 15 12 73
Already have
Considering
Neither

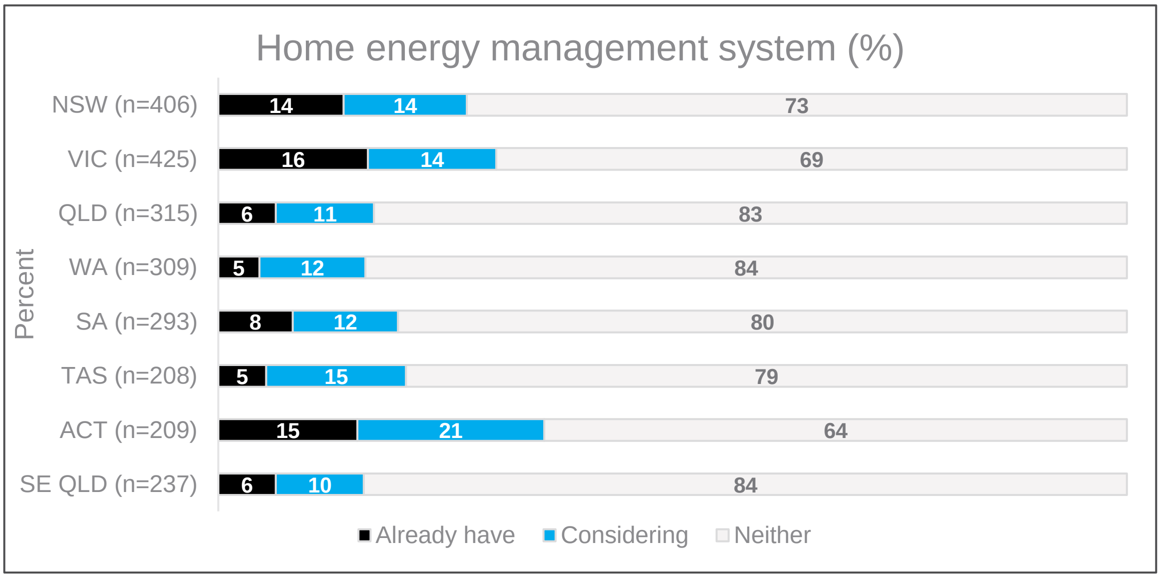

Mains gas (%)
Percent
NSW (n=406) 48 3 49
VIC (n=425) 80 3 17
QLD (n=315) 17 3 79
WA (n=309) 73 2 25
SA (n=293) 58 1 41
TAS (n=208) 7 6 88
ACT (n=209) 68 2 30
SEQ (n=237) 20 3 77
Already have
Considering
Neither

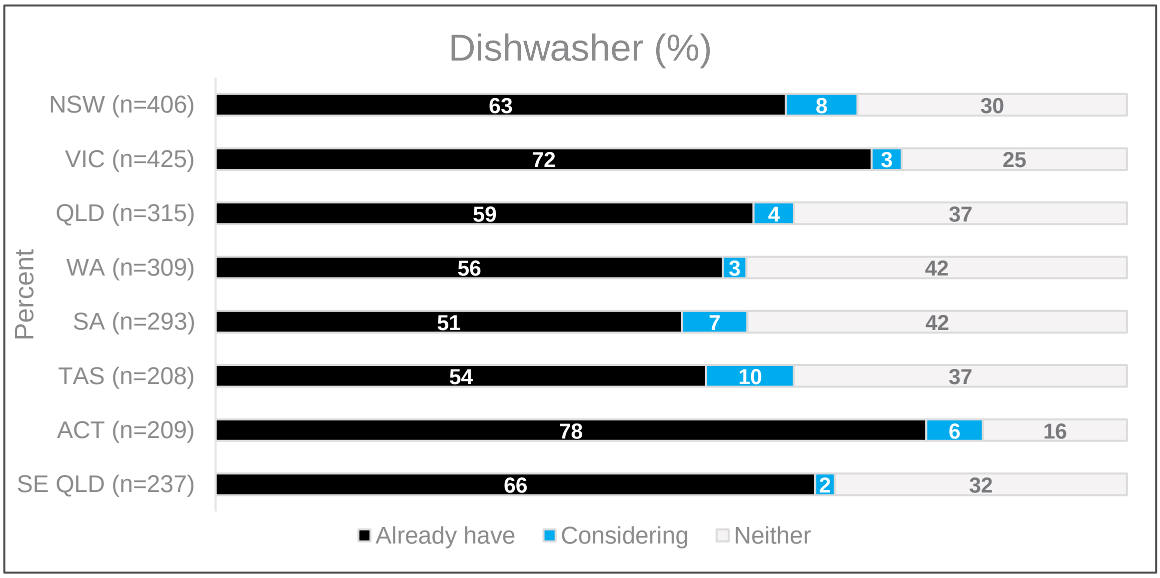

Electric vehicle (%)
Percent
NSW (n=406) 8 13 78
VIC (n=425) 6 17 77
QLD (n=315) 3 14 83
WA (n=309) 3 17 80
SA (n=293) 2 14 84
TAS (n=208) 3 13 84
ACT (n=209) 8 22 70
SE QLD (n=237) 3 13 85
Already have
Considering
Neither

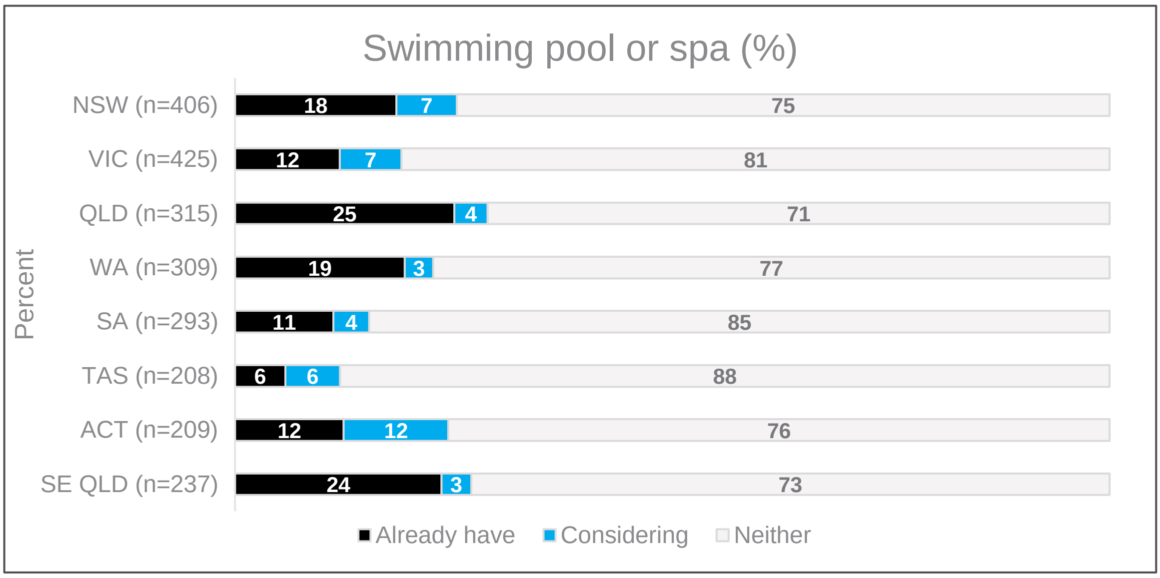

Battery storage system (%)
Percent
NSW (n=406) 9 17 75
VIC (n=425) 10 21 70
QLD (n=315) 7 21 73
WA (n=309) 4 29 67
SA (n=293) 9 23 69
TAS (n=208) 5 21 74
ACT (n=209) 8 31 61
SE QLD (n=237) 7 20 73
Already have
Considering
Neither


Rooftop solar panels (%)
Percent
NSW (n=406) 24 17 58
VIC (n=425) 34 15 51
QLD (n=315) 38 11 50
WA (n=309) 36 16 48
SA (n=293) 46 12 42
TAS (n=208) 28 17 55
ACT (n=209) 26 24 50
SE QLD (n=237) 38 11 51
Already have
Considering
Neither


Digital/Smart meter (%)
Percent
NSW (n=406) 34 10 56
VIC (n=425) 71 5 24
QLD (n=315) 29 8 63
WA (n=309) 28 9 63
SA (n=293) 33 9 58
TAS (n=208) 30 15 55
ACT (n=209) 39 11 50
SE QLD (n=237) 28 9 63
Already have
Considering
Neither


Home energy management system (%)
Percent
NSW (n=406) 14 14 73
VIC (n=425) 16 14 69
QLD (n=315) 6 11 83
WA (n=309) 5 12 84
SA (n=293) 8 12 80
TAS (n=208) 5 15 79
ACT (n=209) 15 21 64
SE QLD (n=237) 6 10 84
Already have
Considering
Neither


Dishwasher (%)
Percent
NSW (n=406) 63 8 30
VIC (n=425) 72 3 25
QLD (n=315) 59 4 37
WA (n=309) 56 3 42
SA (n=293) 51 7 42
TAS (n=208) 54 10 37
ACT (n=209) 78 6 16
SE QLD (n=237) 66 2 32
Already have
Considering
Neither


Swimming pool or spa (%)
Percent
NSW (n=406)
18
7
75
VIC (n=425)
12
7
81
QLD (n=315)
25
4
71
WA (n=309)
19
3
77
SA (n=293)
11
4
85
TAS (n=208)
6
6
88
ACT (n=209)
12
12
76
SE QLD (n=237)
24
3
73
Already have
Considering
Neither

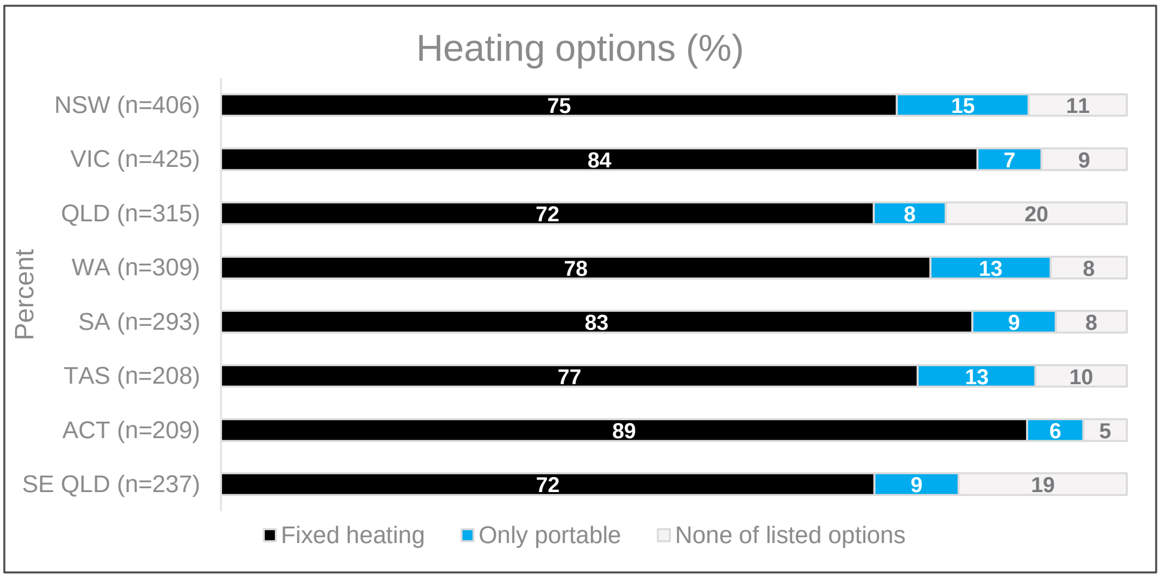
Home heating

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

- The survey shows what people have available 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 use other heating options (such as wood burners) which are not accounted for in this research.

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.

- Most household consumers in this survey report having fixed heating, with the highest proportion found in the ACT (89%).
- Heating options are less common in Queensland (20% report no heating).
- New South Wales, Western Australia and Tasmania have the highest uptake of portable heating options (15%, 13% and 13% respectively).

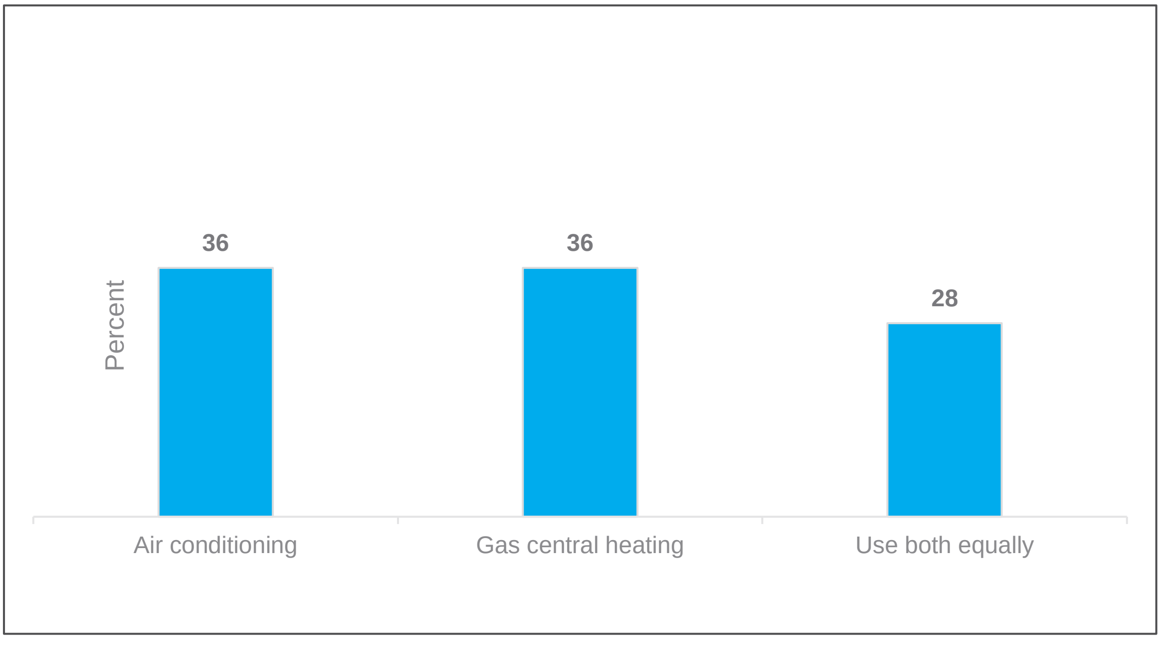


The choice between air conditioning & gas central heating

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.

- 36% use their gas central heating more than air conditioning, while the same proportion say they use their air conditioning more often.
- 28% 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? (%)



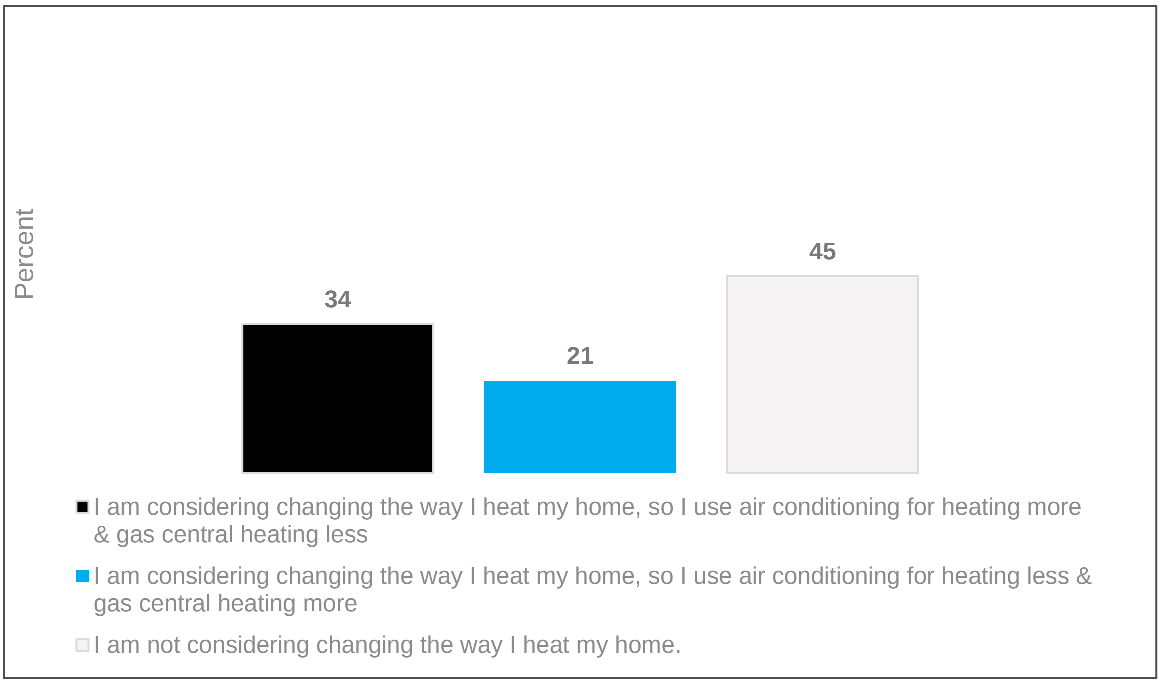
Base: Household consumers with both air conditioning (for cooling & heating) and gas central heating (n=281)

*Breakdowns for individual states too small to be reported

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

- 34% say they are considering using air conditioning more and gas heating less, while 21% are thinking about using gas more and air conditioning less.
- 45% 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=281)

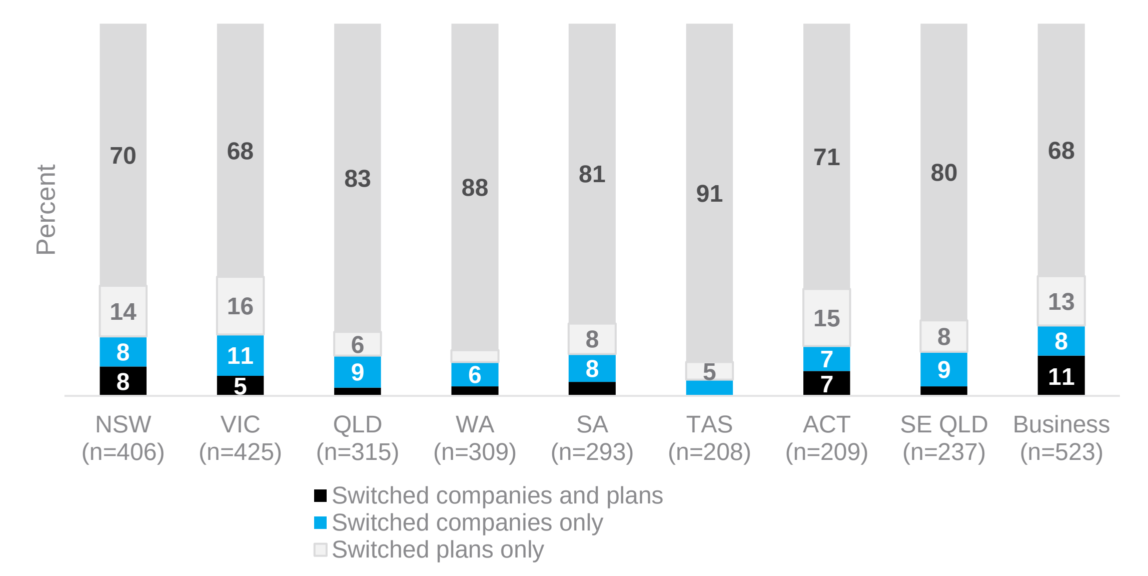
*Breakdowns for individual states or for business consumers too small to be reported

Recent switching

Switching activity is highest in fully contestable markets.

- Switching energy companies and plans is highest in New South Wales (30%), Victoria (32%) and the ACT (29%).
- In deregulated SE Queensland, 20% of consumers have switched companies and/or plans in the past 12 months.
- Less than 1 in 10 (9%) Tasmanians say they have switched companies or plan.
- Over a third of small business consumers have switched companies or plans in the past year (32%).

Which of the following have you done in the last year? (%)



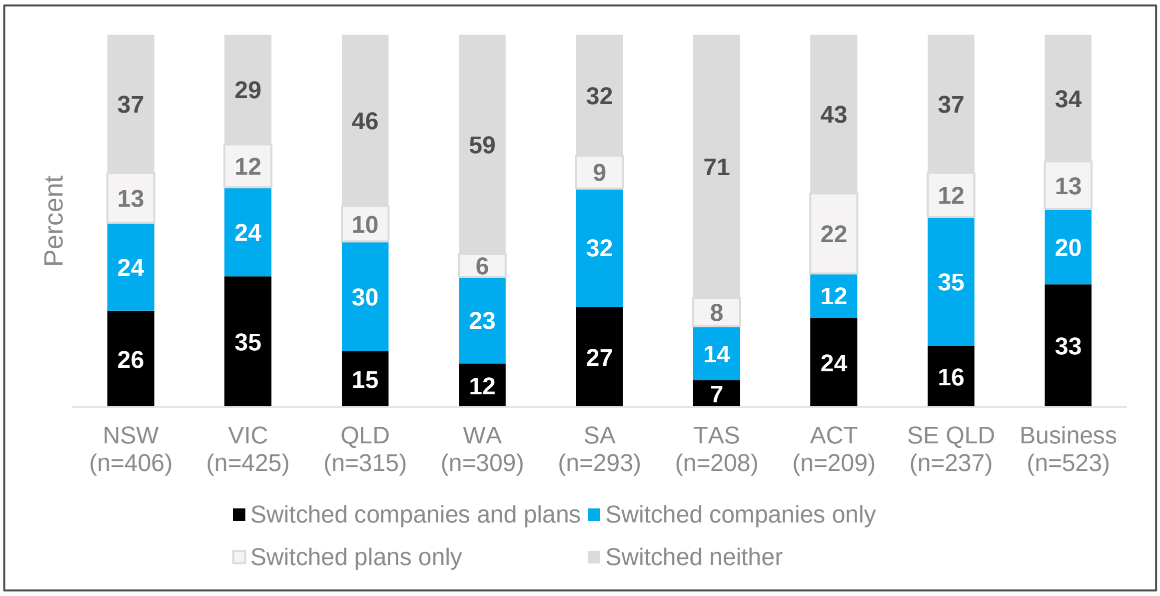
Note: For readability, percentages have been omitted where they are less than 5%

Switching history

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

- The proportion of household consumers who have ever switched is highest in Victoria (71% have switched plans and/or companies), followed by South Australia (68%), South East Queensland (63%) and New South Wales (63%).

Which of the following have you ever done? (%)



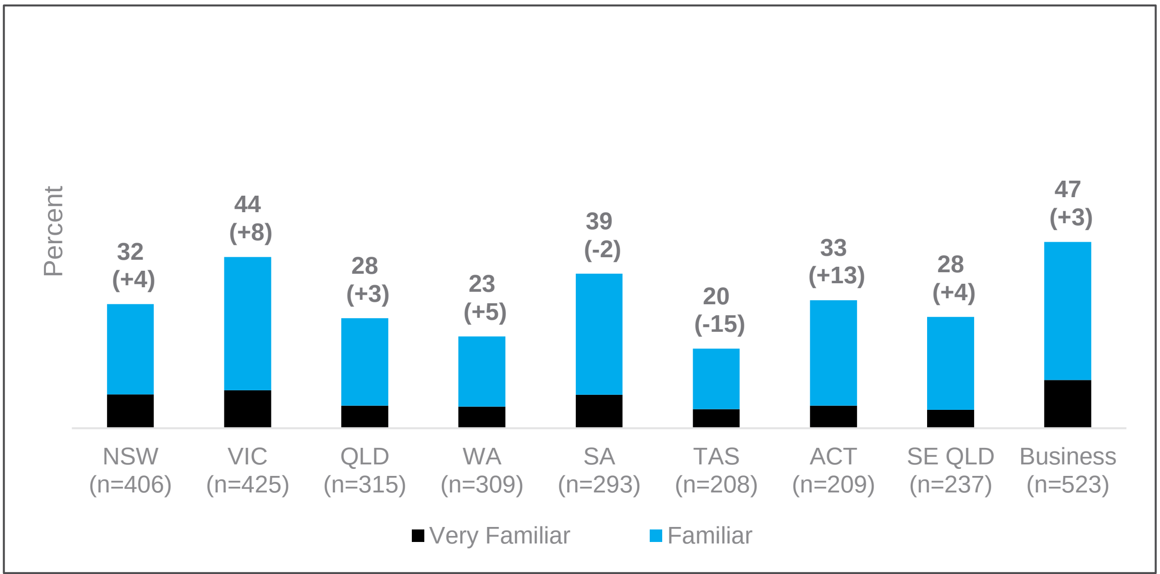
Note: For readability, percentages have been omitted where they are less than 5%

Awareness of the Energy Ombudsman

Declared awareness of the Energy Ombudsman is up in the ACT and Victoria, but down in Tasmania.

- Declared awareness is up 13% in the ACT (33% now say they are familiar with the Ombudsman) and up 8% in Victoria (now 44%)
- Declared awareness is, however, down 15% in Tasmania (now 20%).

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



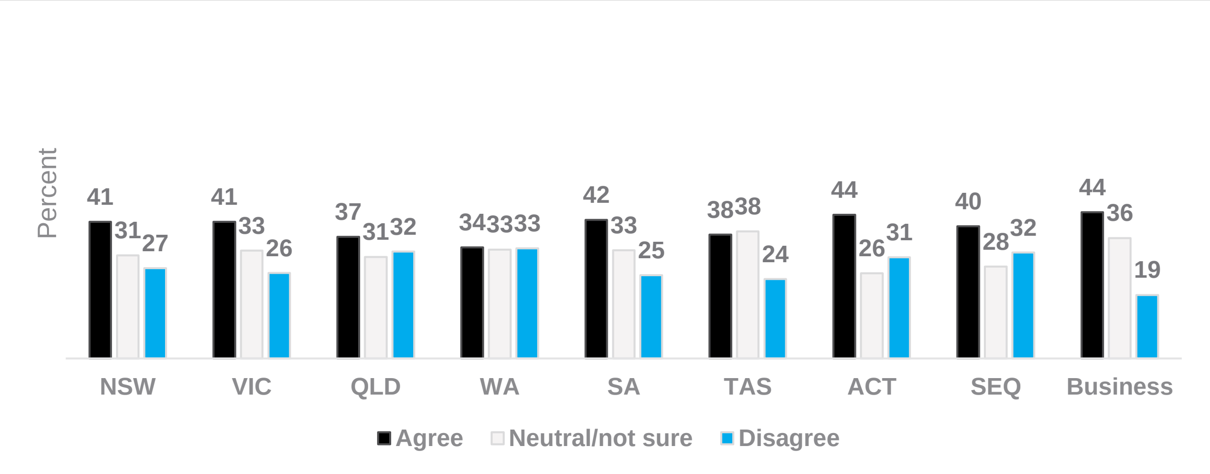
Note: The figure is the aggregate of 'Very Familiar' and 'Familiar'

Communications from energy providers

Less than half of all consumers clearly recall the most recent communications they received from their energy provider.

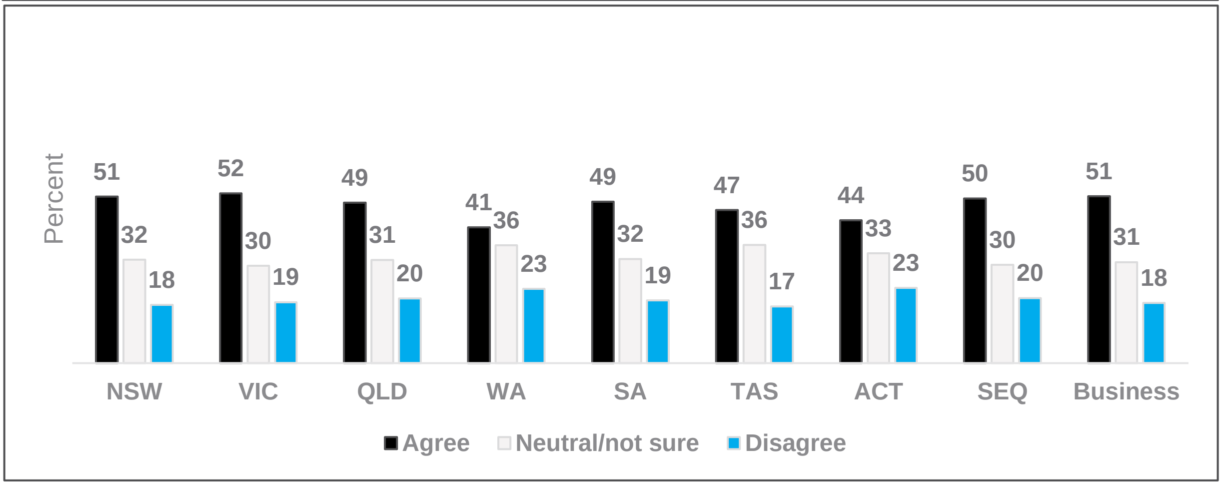
- Small business consumers (44%), household consumers in the ACT (44%) and South Australia (42%) are most likely to agree that they recall the most recent communication.
- Western Australians (34%) are least likely to remember the last communications sent to them by their energy company.

"How strongly do you agree or disagree with the following statements about communication from your energy company? – I clearly remember when my energy company most recently sent communications to me" (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

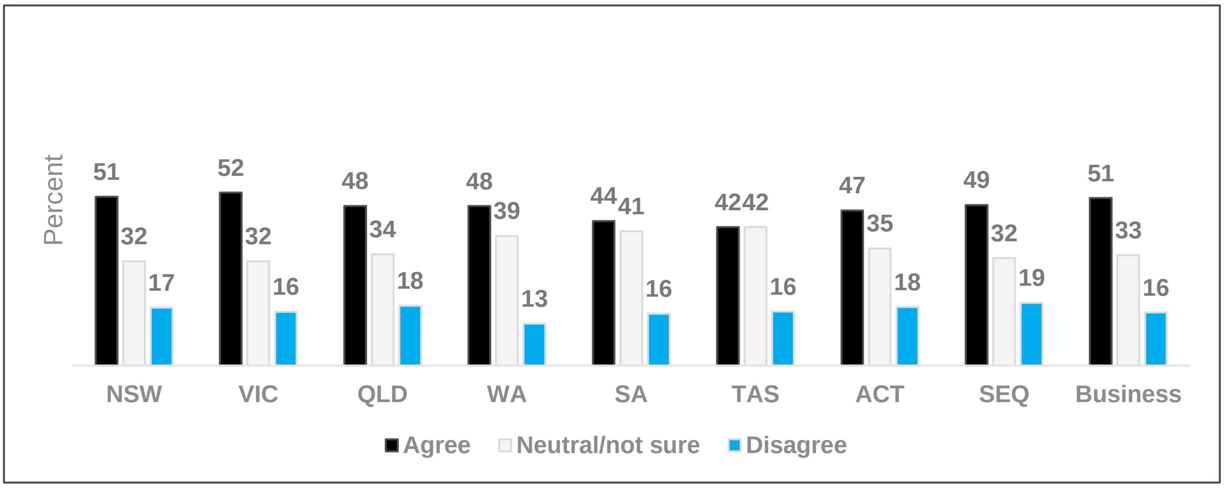
"How strongly do you agree or disagree with the following statements about communication from your energy company? – I usually pay a lot of attention to communications from my energy company" (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

- Only about half of all consumers agree that they usually pay a lot of attention to communications from their energy company.
- Similarly, only about half of all consumers agree their energy company provides useful information to them.

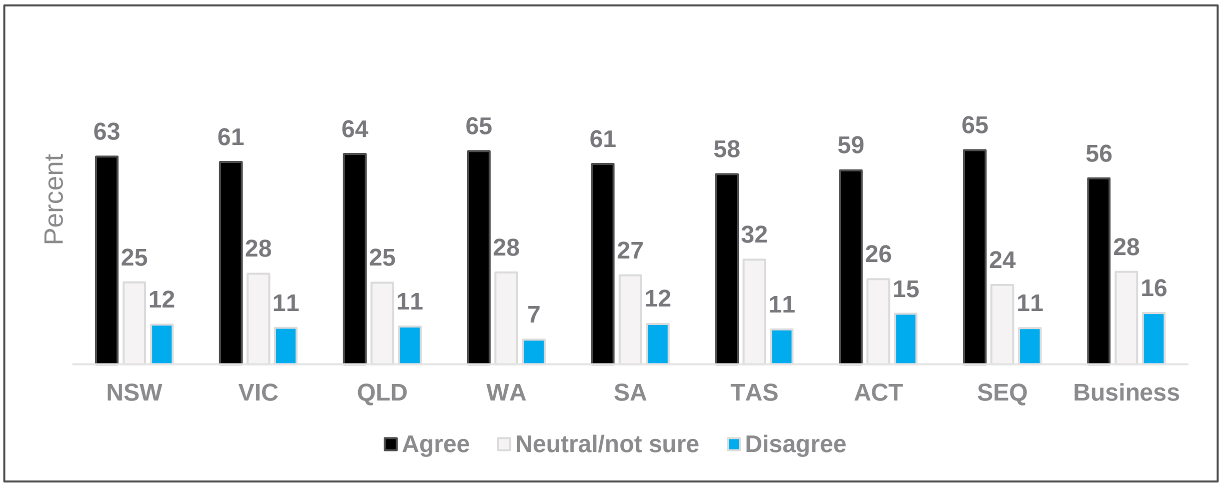
"How strongly do you agree or disagree with the following statements about communication from your energy company? – The communications from my energy company provide me with useful information" (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

- Over a third of consumers do not agree or are unsure on the proposition that the communications from their energy company are easy to read.

"How strongly do you agree or disagree with the following statements about communication from your energy company? – The communications from my energy company are usually easy to read" (%)

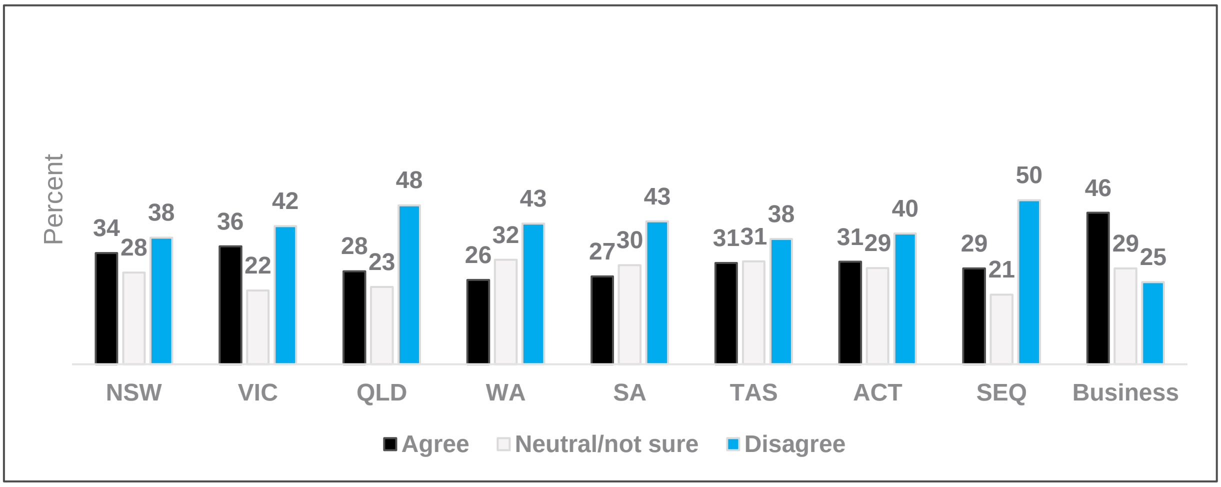


Base: Household consumers (n=2,192), Small business consumers (n=523)

Effects of COVID-19

- About a third of all household consumers and just under half (46%) of small businesses agree that they are now more concerned about their ability to pay electricity bills than they were before the pandemic.
- Household consumers are split on whether they have received useful communications from their electricity providers about help available to help them manage their electricity bills since the pandemic began.
- About two-thirds of consumers disagree or are unsure whether they have received useful communications from their electricity provider about help to manage their bills during the pandemic (64%).

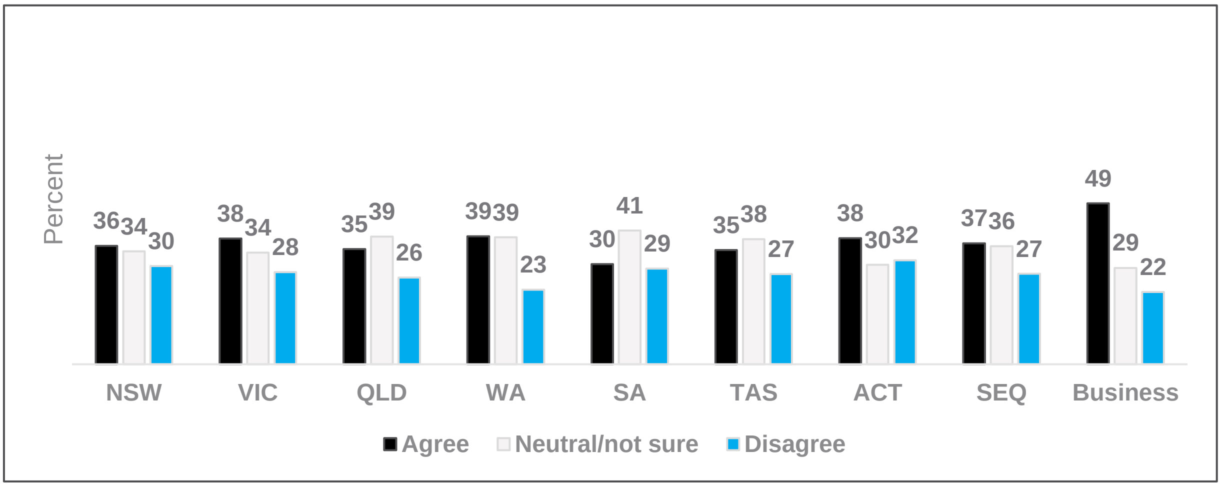
"How strongly do you agree or disagree with the following statements about communication from your energy company? – I am now more concerned about my ability to pay electricity bills than I was before the COVID pandemic" (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

- Over half (51%) of small businesses disagree or are not sure about the proposition that that they have received useful communications from their provider about assistance.

"How strongly do you agree or disagree with the following statements about communication from your energy company? – I have received useful communications from my electricity provider about help available to help me manage my electricity bills since the COVID pandemic began" (%)



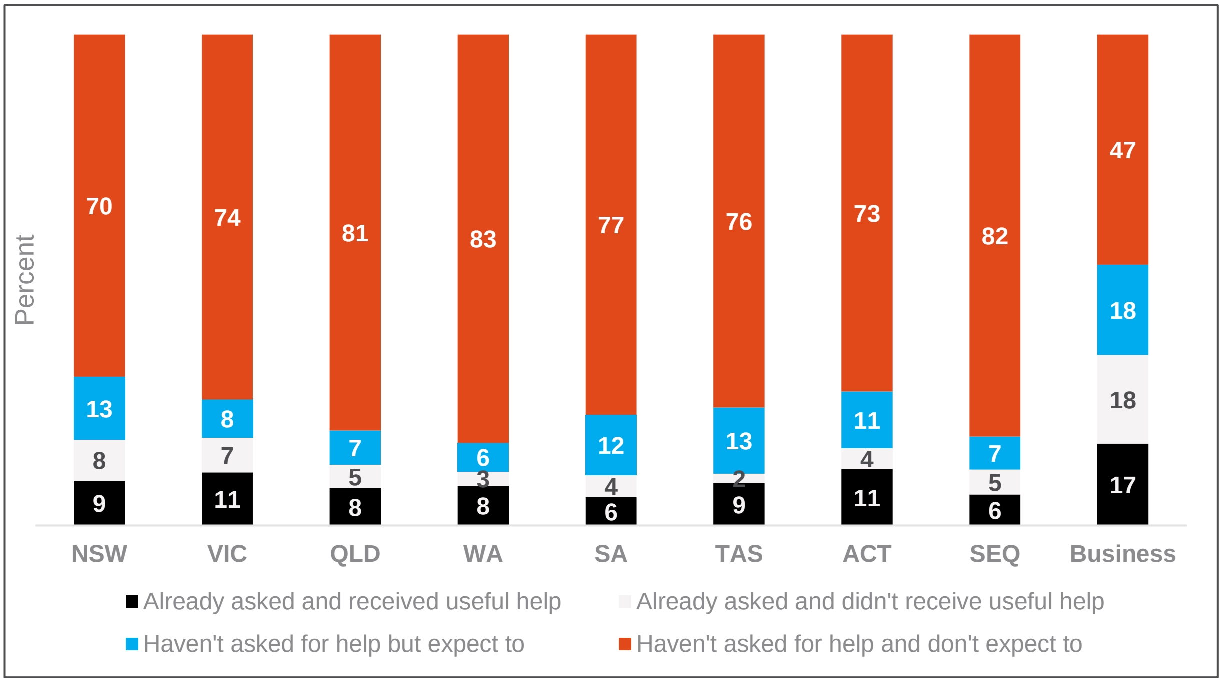
Base: Household consumers (n=2,192), Small business consumers (n=523)

Asking for help from electricity provider since COVID-19

Around 1 in 5 household consumers say they have asked for help or expect to do so in the near future, since the pandemic began.

- The proportion who asked for help but didn't find it useful ranges from 47% in New South Wales to just 18% in Tasmania. Over half (53%) of small businesses have asked for help or expect to do so in the near future.

"Which of the following applies most to you since the COVID-19 outbreak began?" (%)



Base: Household consumers (n=2,192), Small business consumers (n=523)

Small business

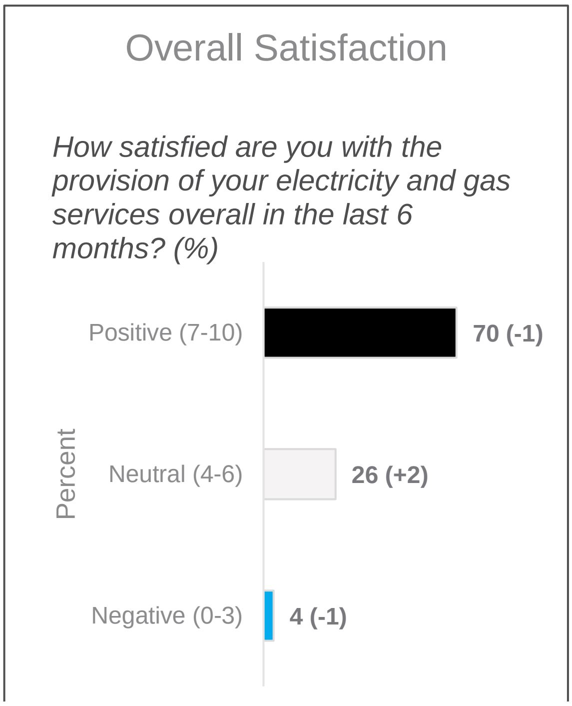
Overall satisfaction

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

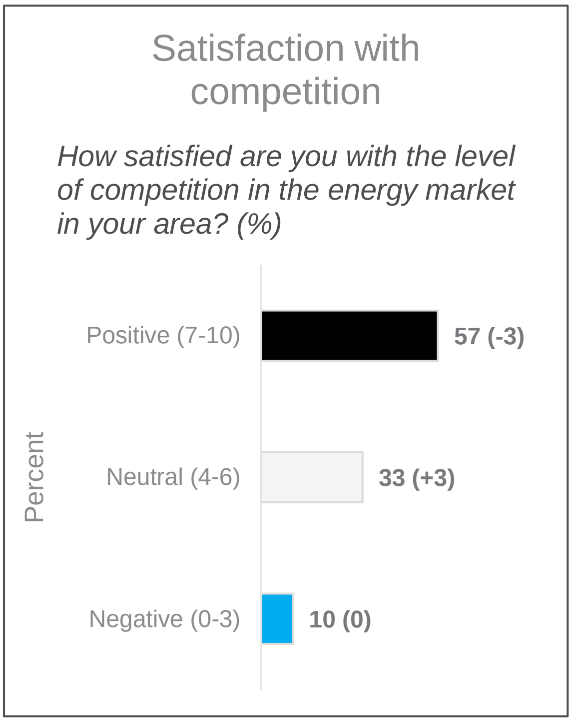
- 70% of businesses are satisfied with the provision of electricity and gas services.

Over half of businesses are satisfied with the level of competition in their local area.

- 57% now report being satisfied with competition in the energy market, with 33% neutral and 10% negative.



Base: Small businesses (n=523)



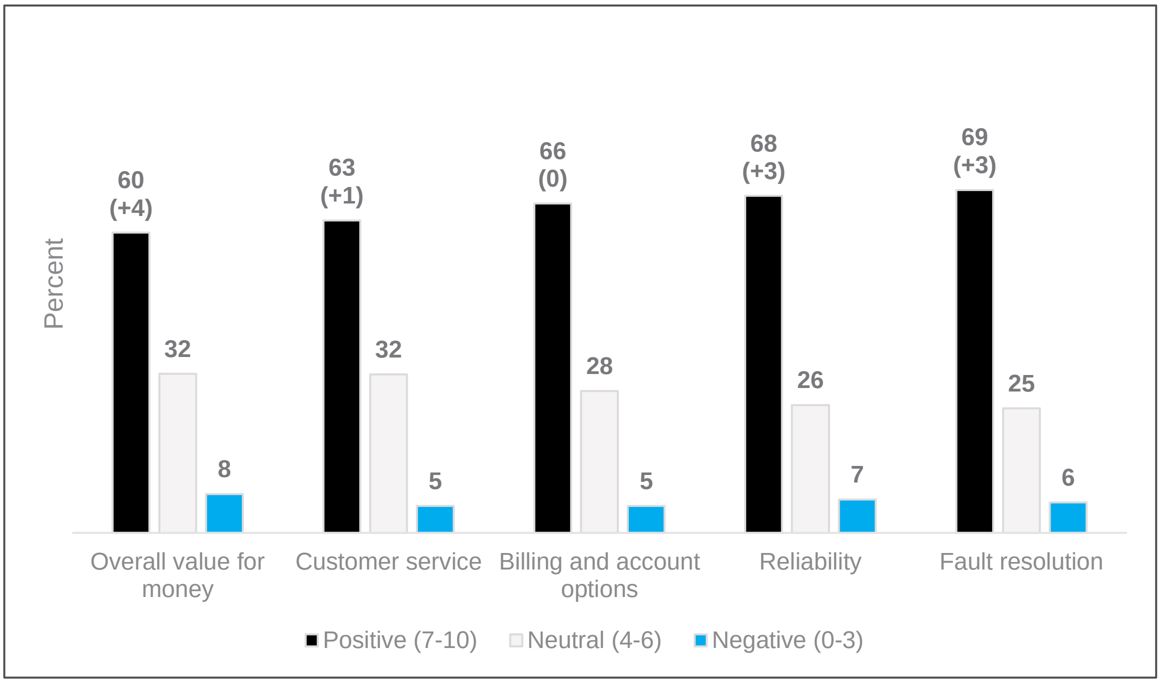
Base: Small businesses (n=523)

Satisfaction with electricity

Satisfaction among small business electricity consumers has remained stable for all measures.

- There were no falls in satisfaction relating to electricity in the past year.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



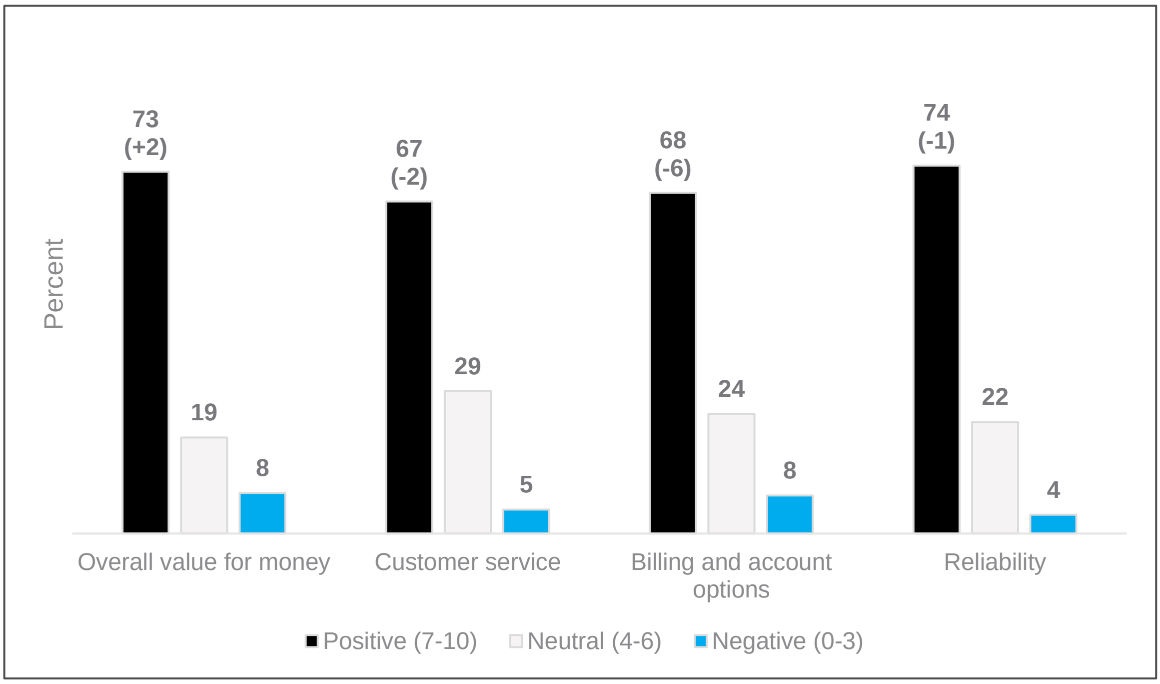
Base: Small businesses with electricity supply (n=523)
Base for fault resolution: Small businesses who rated 0 to 9 satisfaction and had a power outage (n=338)

Satisfaction with gas

Satisfaction with billing and account options has decreased among small businesses in the past year.

- Satisfaction with billing and account options fell to 68% (down 6%), while satisfaction with other aspects remained similar.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Small businesses with gas supply (n=345)

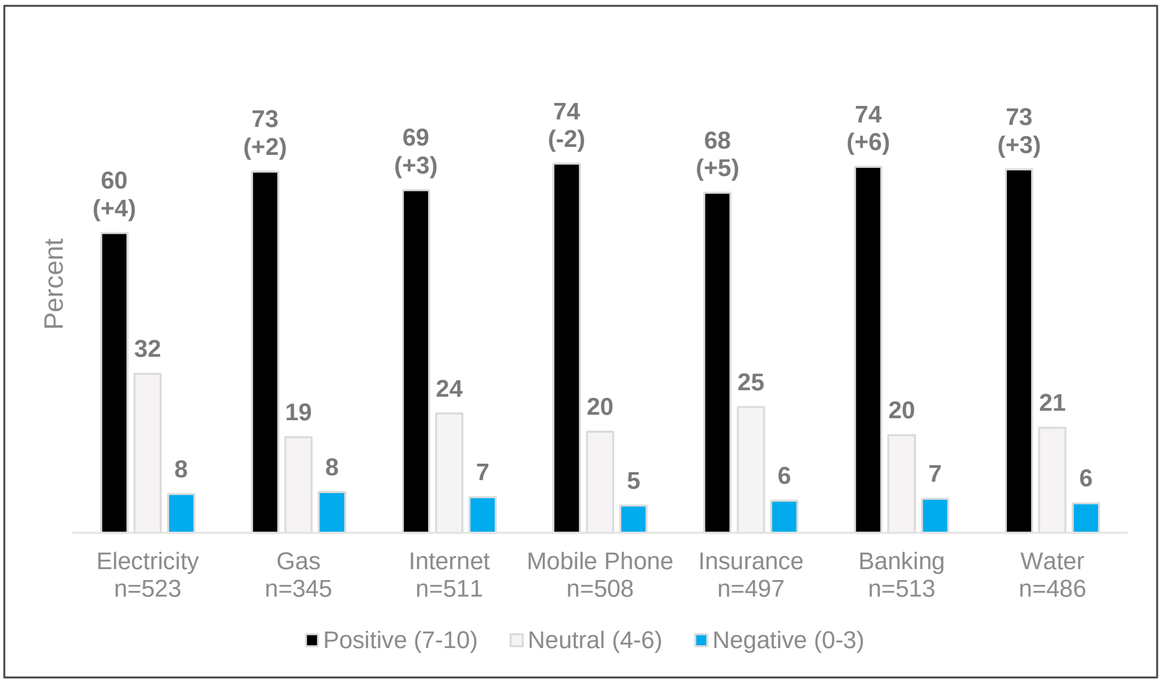
Rating of utilities and services

Small business consumers continue to rate electricity as providing the worst value for money of all utilities and services, while gas compares similarly to other comparable services.

- 60% of small business consumers rate the value for money of their electricity service positively. This level continues to lag behind other utilities and services, including gas.
- With a positive rating of 73%, the value for money of gas is on par with other utilities and 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'



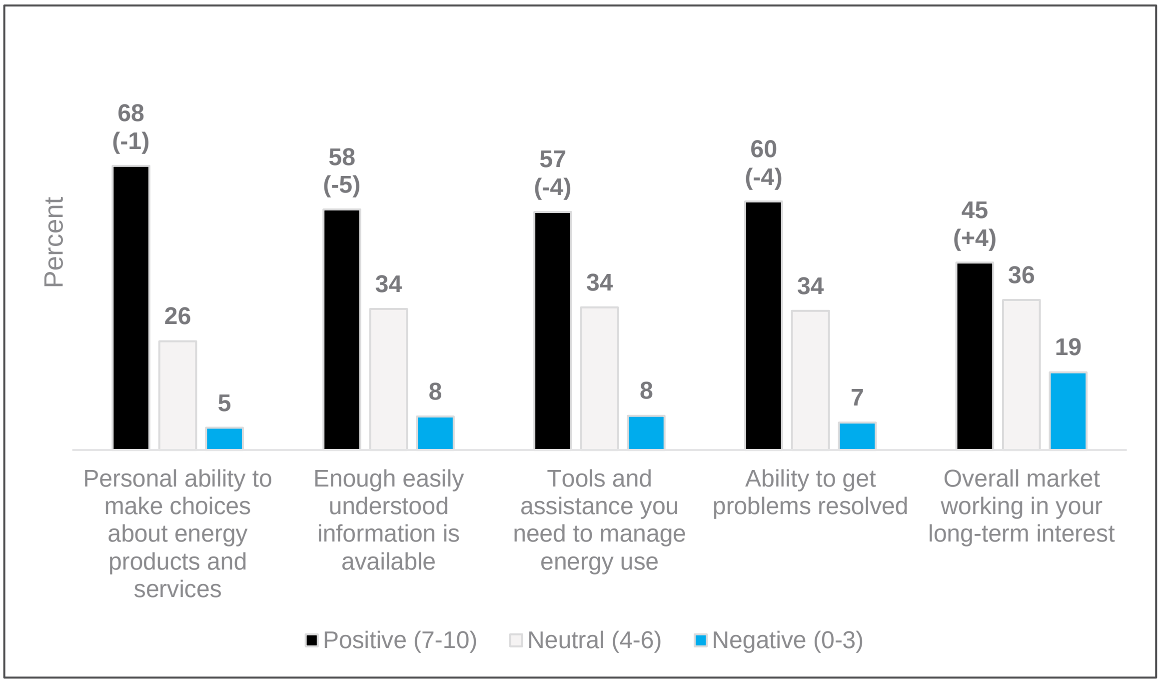
Base: Small businesses with these services

Confidence in information, tools and a working market

Less than half of all small business consumers are confident that the overall market is working in their long-term interests.

- Only 45% of small businesses are confident that the overall market working in their long-term interests.
- Small business consumers have lost some confidence that there is enough easily understood information available (down 5% to 58%).

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Small businesses (n=523)

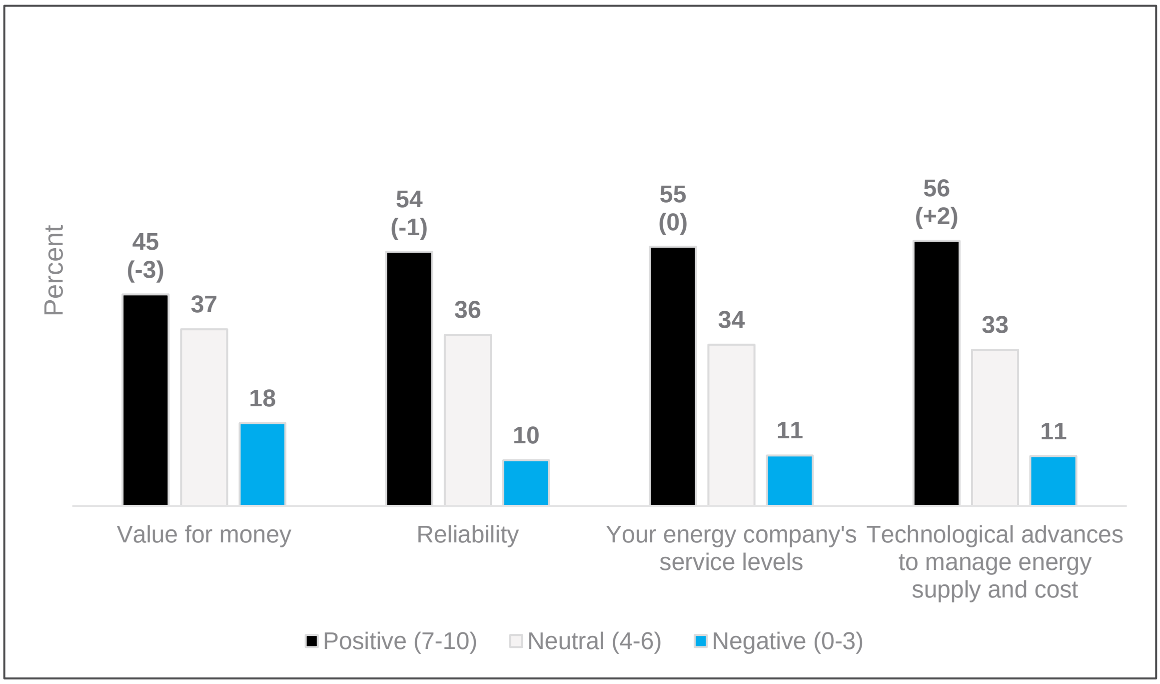
Confidence in long-term outcomes

Small business consumers' confidence that the market will provide better long-term outcomes has remained stable, with less than half confident that value for money will improve in the future.

- Slightly more than half of all small business consumers are now positive about future reliability, customer service and technological advancement, but there has been no substantial improvement in this over the past year.
- Confidence that value for money will improve in the future remains below other measures at 45%.

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'



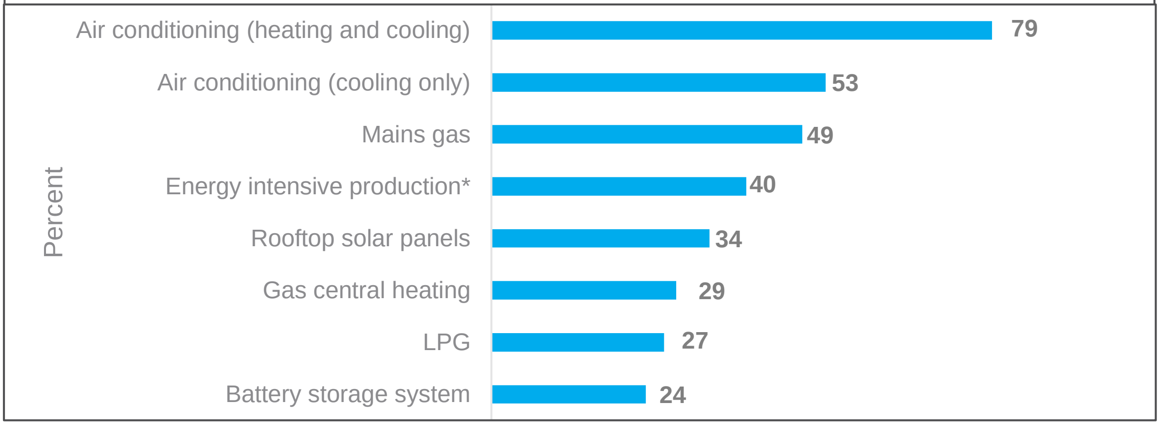
Base: Small businesses (n=523)

Uptake of technologies

Small business consumers use a range of technologies to control and manage their energy costs.

- 62% of small business consumers have a digital/smart meter, and 36% use it to control their energy costs.
- 39% of small business consumers have a smart thermostat, with 24% using it to control their energy costs.
- 37% have an energy management system, and 24% use it to control their energy costs.

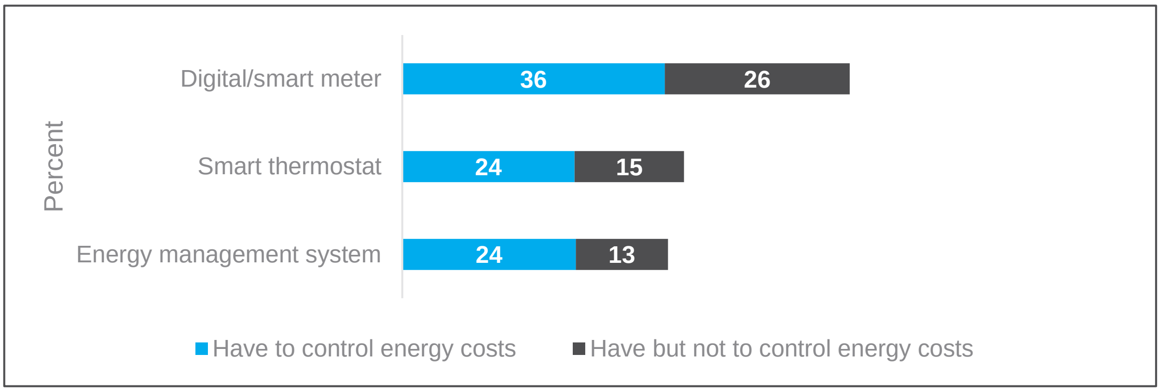
Which of the following do you have in your place of business? (%)



Base: Small business consumers (n=523)

*Energy intensive production is only asked of businesses working from a fixed location (n=302)

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



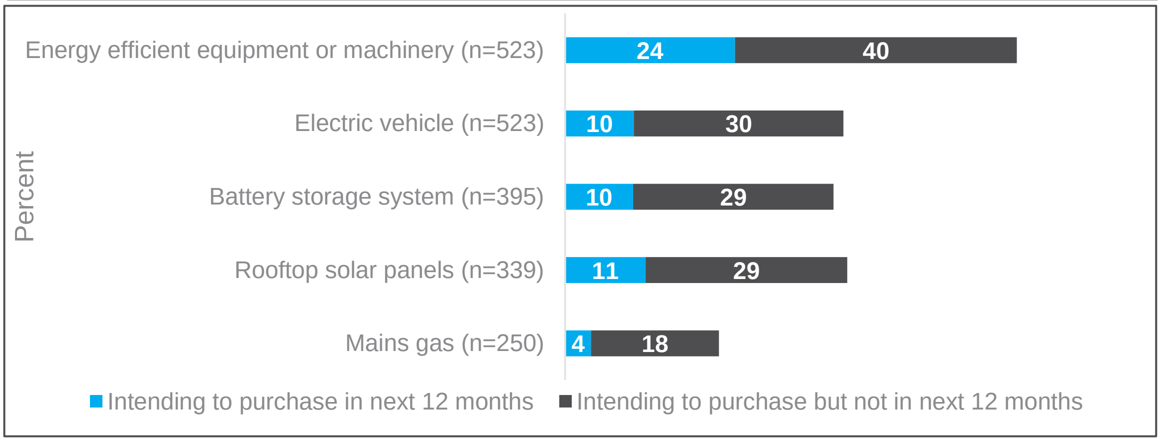
Base: Small business consumers (n=523)

Future uptake of technologies

There is interest among small business consumers in purchasing energy efficient equipment and new technology in the coming year.

- 64% say they intend to purchase energy efficient equipment or machinery for their business, but most of these are not intending to do so in the next 12 months.
- 40% of small businesses who do not currently have solar panels say they plan 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 (up 5%), and 10% 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 (n=523)

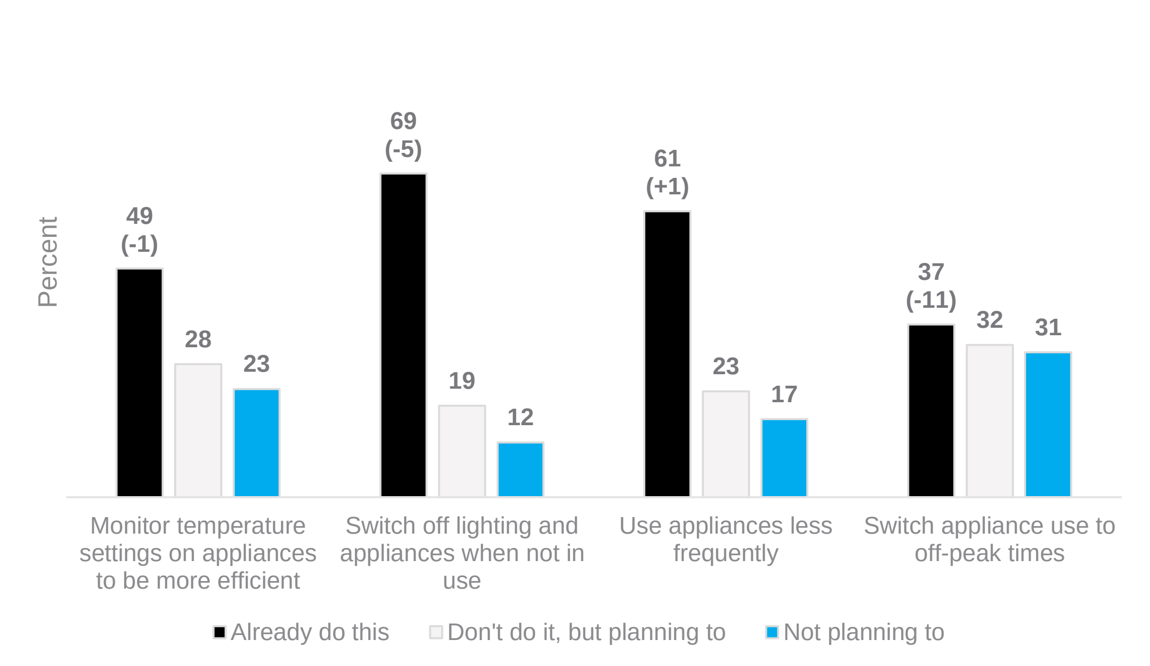
Note: Other than 'energy efficient appliances' and 'electric vehicles', figures are the percentage of those who do not already have that technology in their business.

Reducing energy use

Fewer small business consumers are planning to undertake energy efficiency measures compared to last year.

- There has been an 11% decrease in those who switch their appliance use to off-peak times (to 37%).
- A majority of small businesses say they switch off lighting and appliances when not in use, but this has fallen to 69% (down 5%).
- 61% are using appliances less frequently.
- Around half (49%) of small business consumers say they already monitor temperature settings on appliances to be more efficient.

Which of the following do you do or plan to do? (%)



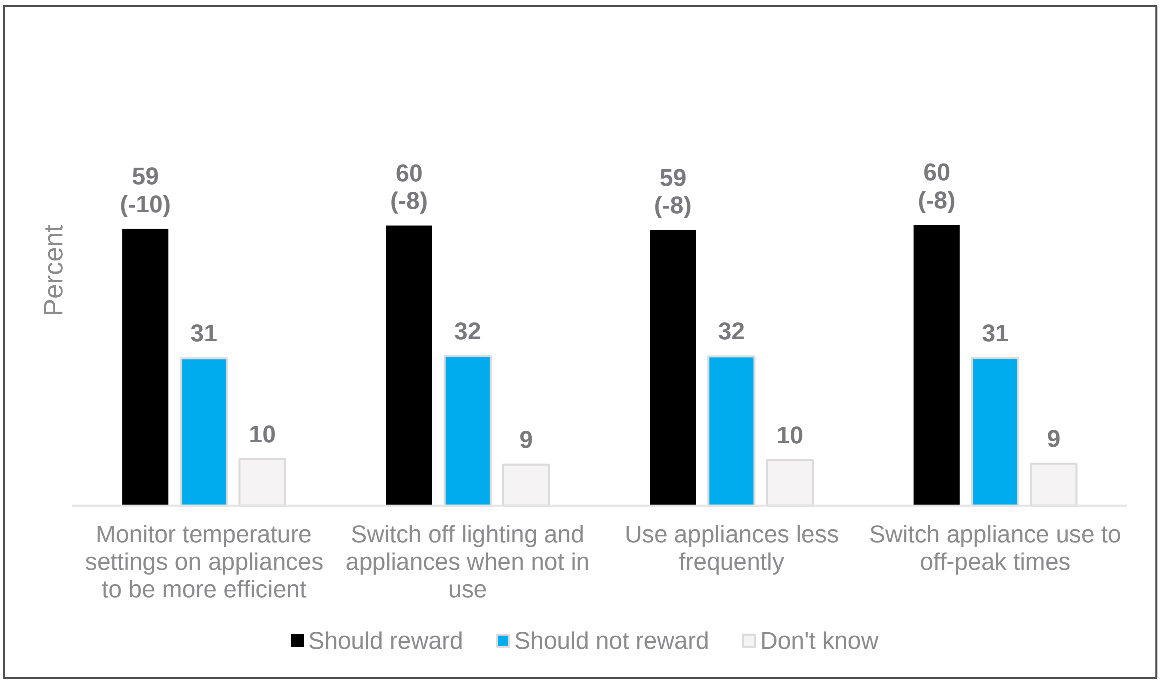
Base: Small businesses (n=523)

Reward for reducing energy use

Fewer small business consumers think there should be financial rewards for reducing their energy usage compared with December 2019.

- The proportion of small business consumers in favour of rewarding energy efficiency are similar across each of the measures tested.
- 59% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (down 10%).
- 60% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (down 8%).
- 60% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (down 8%).
- 59% think electricity companies should do more to financially reward customers who use appliances less frequently (down 8%).

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



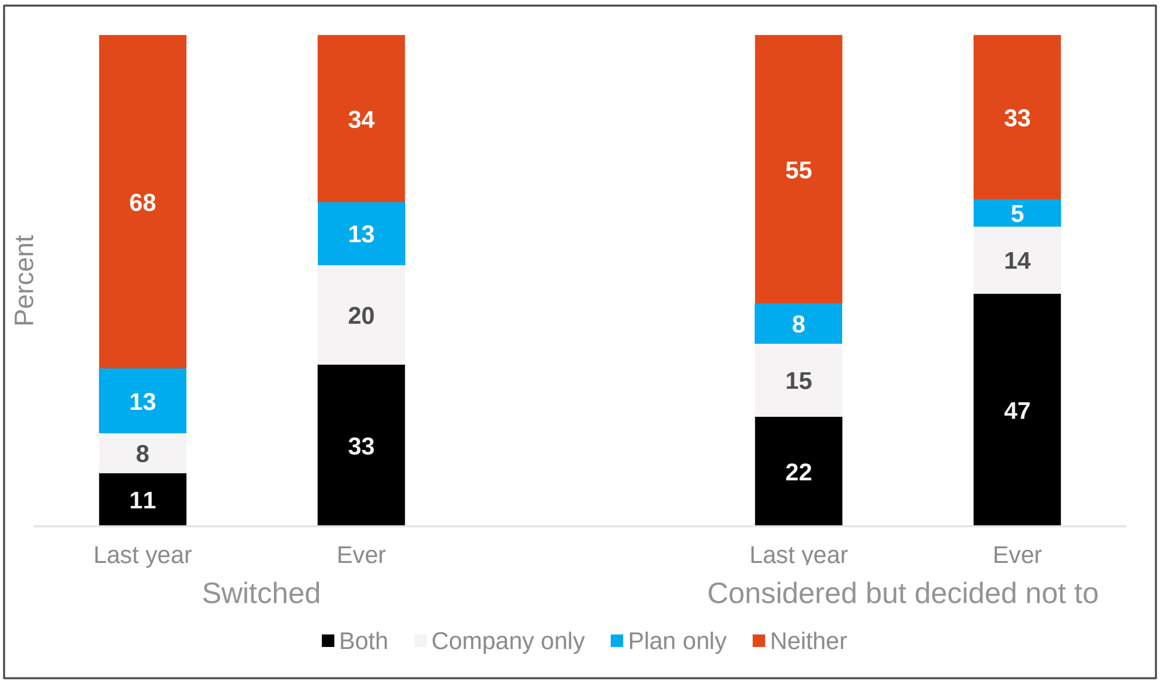
Base: Small businesses (n=523)

Switching behaviour

The majority of small businesses report not having switched plan and/or company in the past year.

- A third (34%) say they have never switched energy companies or plans.
- 45% say they considered switching plan and/or company in the past year but decided not to.
- About two-thirds (68%) say they stayed with the same electricity company and on the same plan during the past year.

Which of the following have you done? (%)



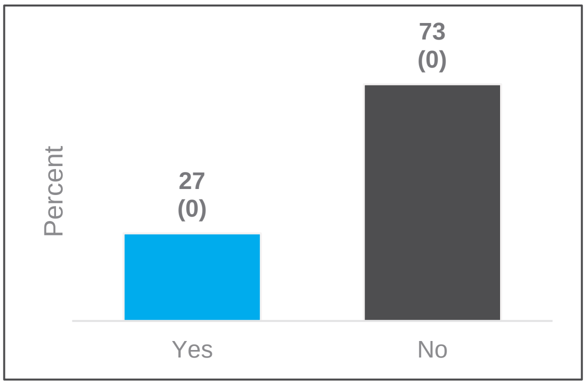
Base: Small businesses (n=523)

Reasons for considering switching

The main reason for switching was dissatisfaction with value for money.

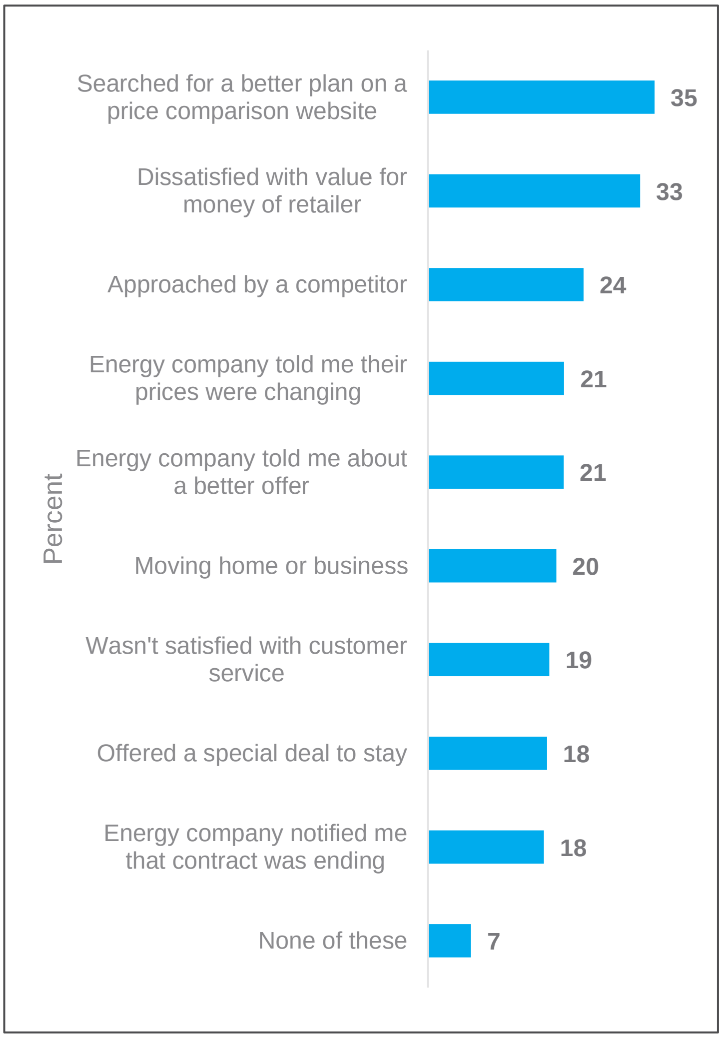
- 35% said that they looked for a better plan on a price comparison website the last time they looked at switching energy companies.
- One-third of small businesses (33%) who looked at switching energy companies were dissatisfied with the level of value for money they received from their retailer.
- 27% intend to switch energy companies in the next year.

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



Base: Small businesses (n=523)

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



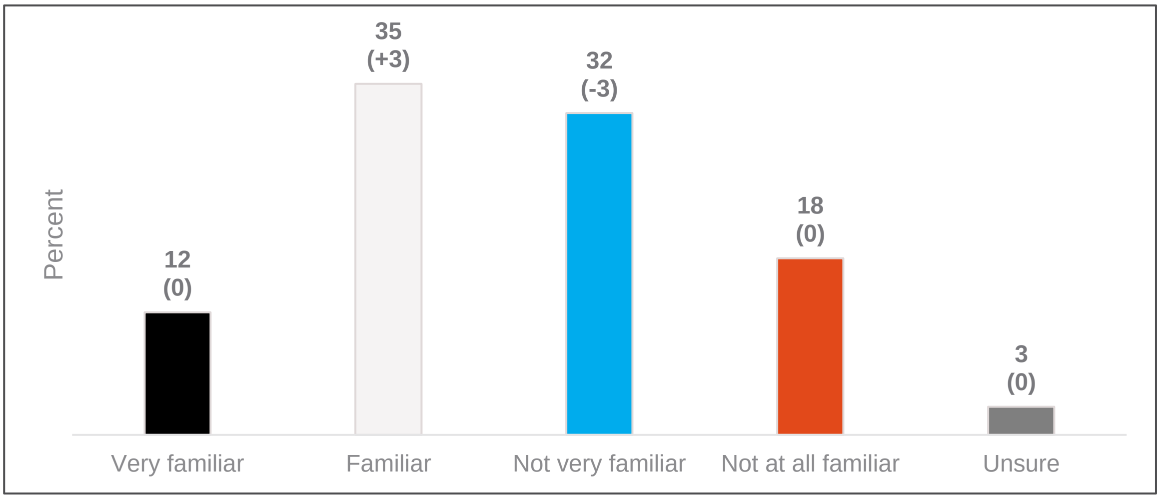
Base: Small businesses who have switched or looked at switching in the past (n=371)

Awareness of the Energy Ombudsman

Awareness of the Energy Ombudsman has remained stable among small business consumers.

- Just under half (47%) of small business consumers claim to be familiar (35%) or very familiar (12%) with the Ombudsman.

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



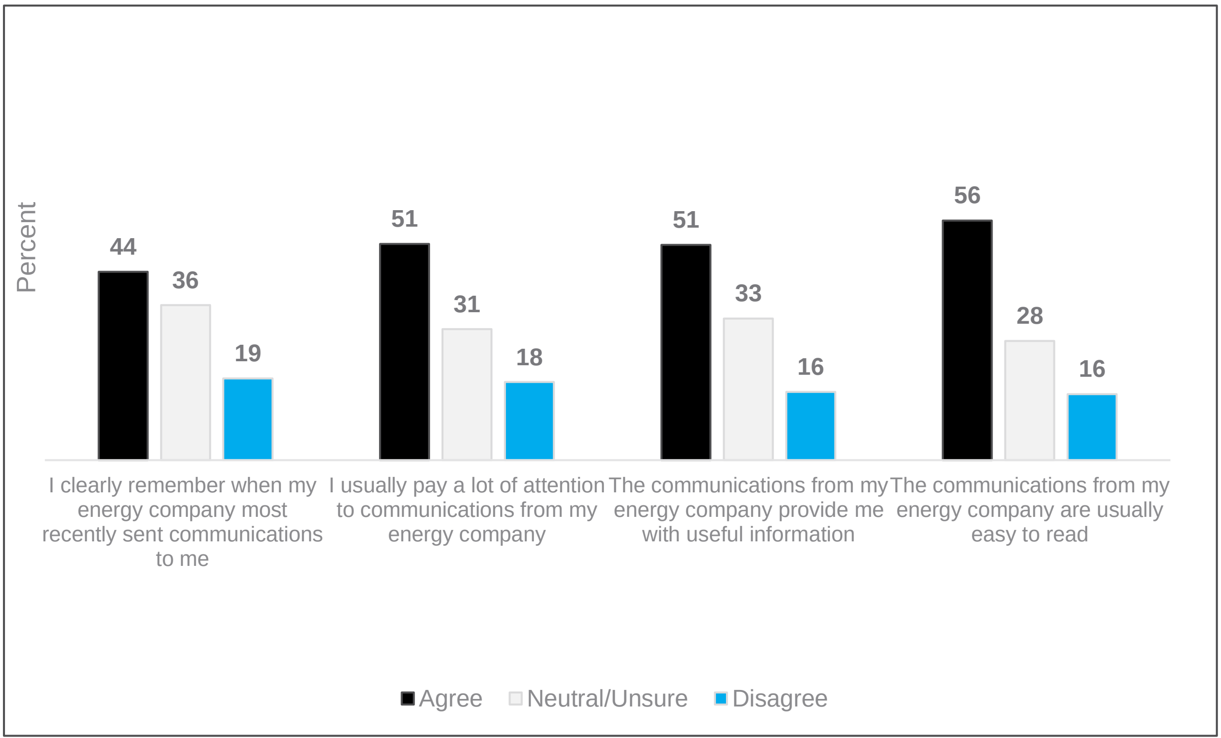
Base: Small businesses (n=523)

Communications from energy providers

Small businesses are concerned about paying their electricity bills.

- About half (51%) disagree or are unsure whether they have received useful communications from their electricity provider about help available to manage their electricity bills since the pandemic began.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



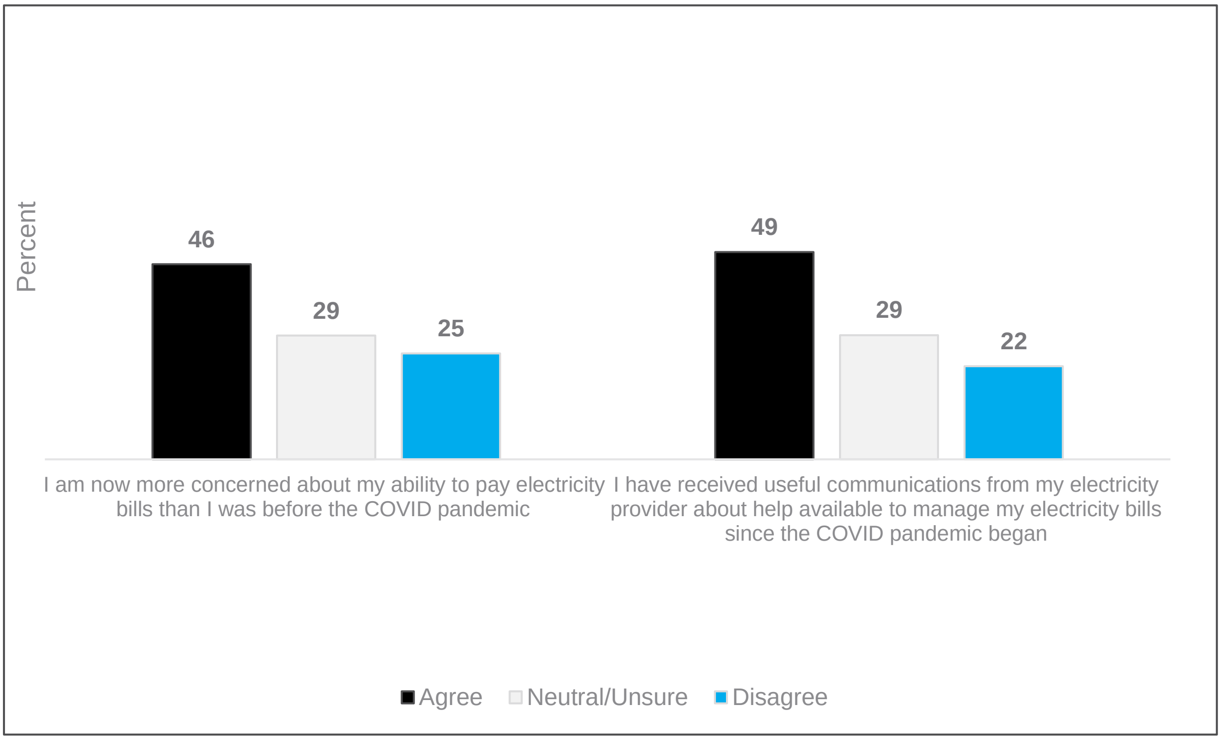
Base: Small businesses (n=523)

Effects of COVID-19

Small businesses are concerned about paying their electricity bills.

- 46% of small business consumers are more concerned about their ability to pay electricity bills than they were before the COVID-19 pandemic.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



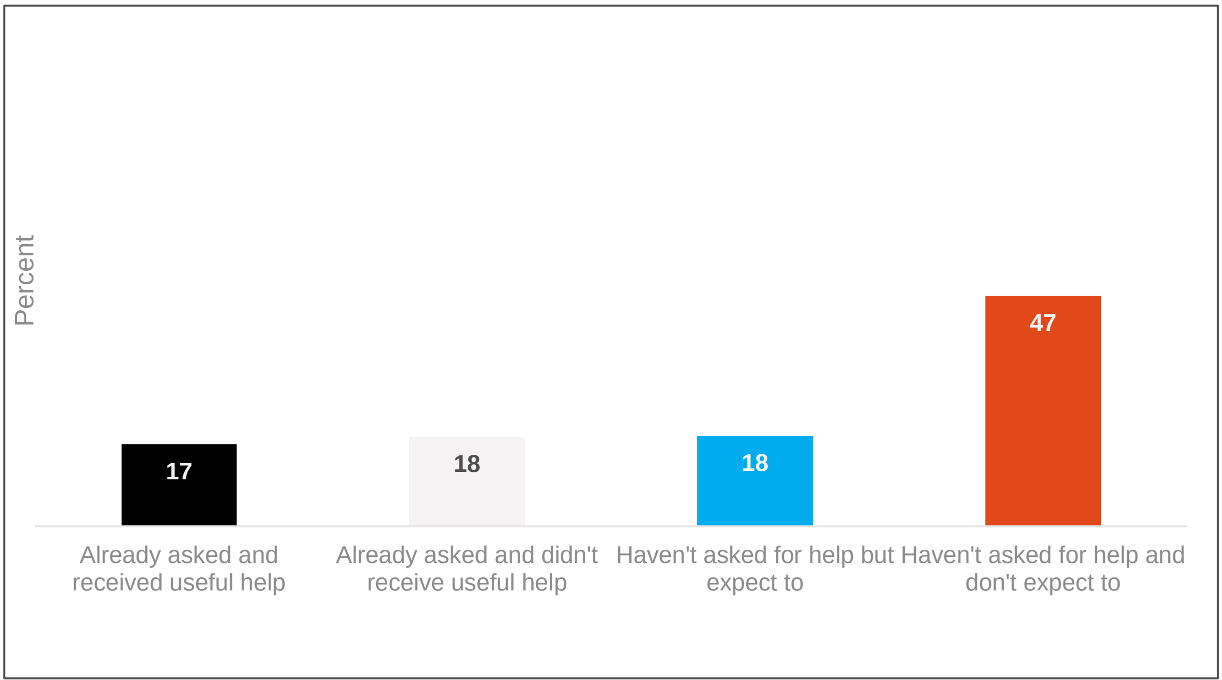
Base: Small businesses (n=523)

Asking for help from electricity provider since COVID-19

Over half (53%) of small business consumers have asked for help since the pandemic began or expect to do so in the near future.

- Over a third (35%) of small business consumers have asked their electricity provider for help with their bills, however around half of these did not find the help they received useful.
- 18% of small business consumers have not yet asked for help but expect to do so in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)



Base: Small business consumers (n=523)

New South Wales

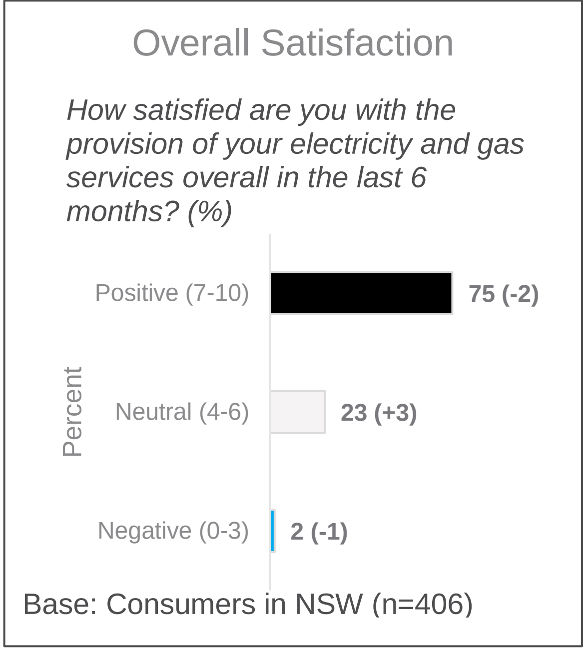
Overall satisfaction

Three-quarters of NSW household consumers are satisfied with their energy services.

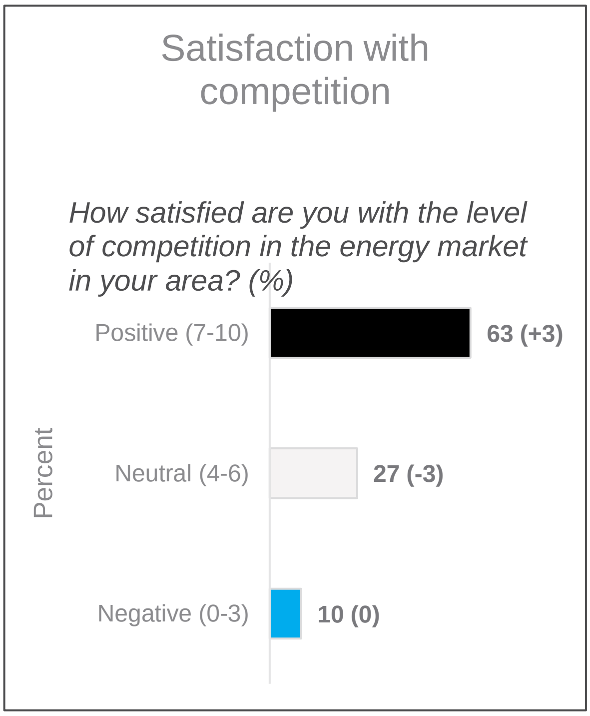
- 75% are satisfied with the provision of electricity and gas.

Satisfaction with the level of competition is high compared to other states.

- 63% say they are satisfied with the level of competition. This is the highest of all the states, with just SE Queensland recording higher levels of satisfaction (69%).



Base: Consumers in NSW (n=406)



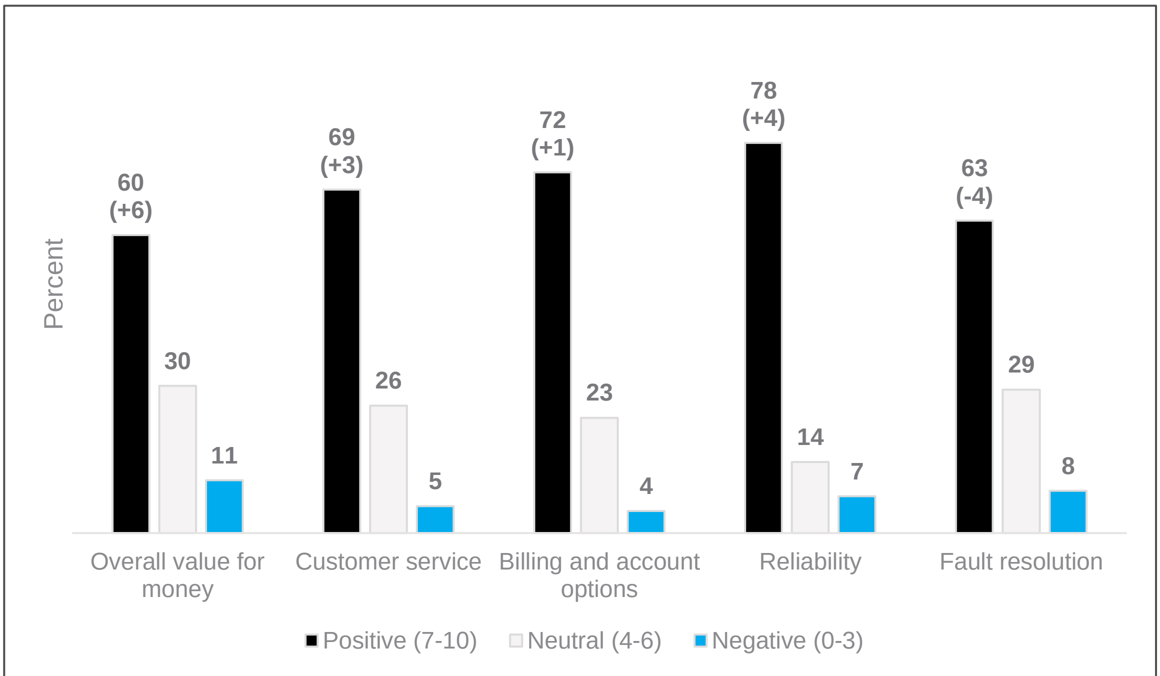
Base: Consumers in NSW (n=406)

Satisfaction with electricity

Satisfaction of household electricity consumers in NSW has generally increased, particularly for overall value for money.

- Satisfaction has increased the most for overall value for money (up 6% to 60%).
- Satisfaction with fault resolution is now at 63% and the only metric to fall over the past year.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



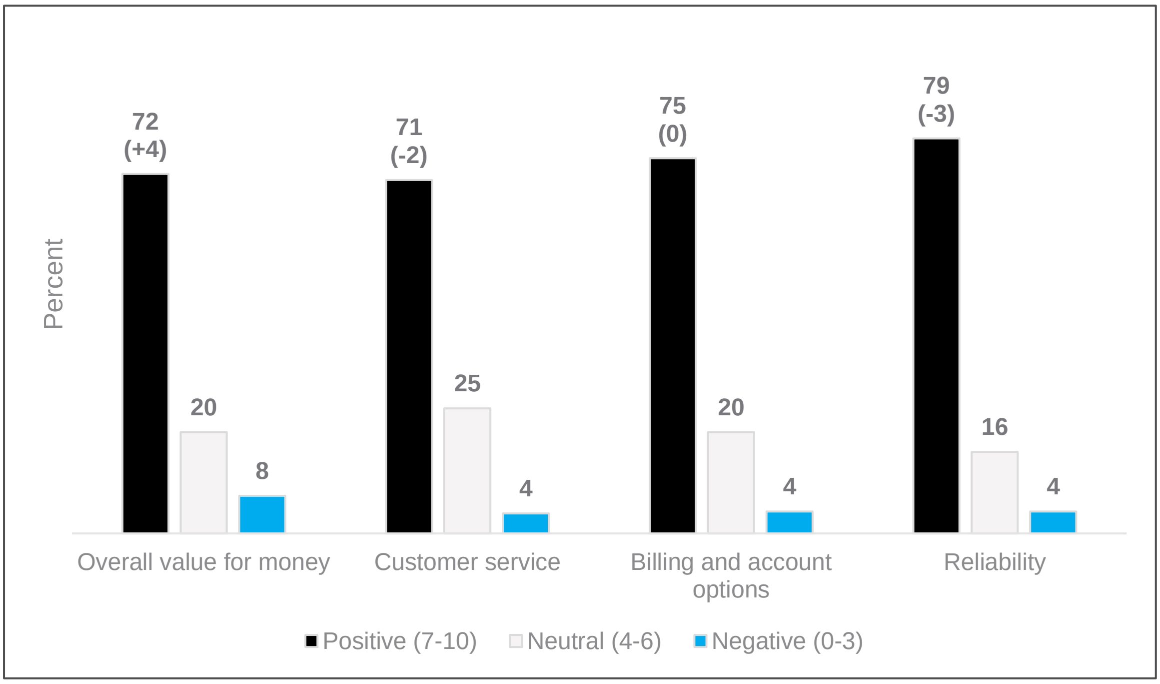
Base: Consumers in NSW with electricity supply (n=406)
Base for fault resolution: Those in NSW who rated 0 to 9 satisfaction and had a power outage (n=177)

Satisfaction with gas

NSW household consumers' satisfaction with their gas service is consistent with last year.

- 72% are now satisfied with the value for money of their gas service.
- Satisfaction with customer service is the lowest of the attributes (71%), while reliability has the highest satisfaction (79%).
- 75% are satisfied with their billing and account options (no change from last year).

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Consumers in NSW with gas supply (n=251)

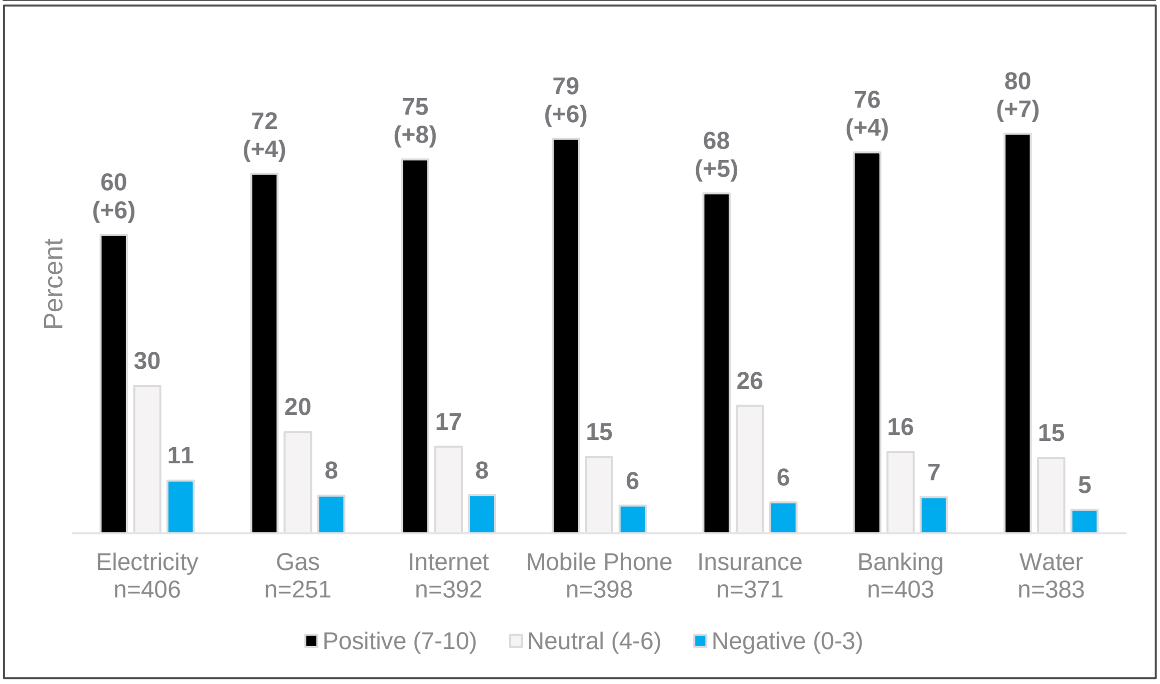
Rating of utilities and services

NSW household consumers rate the value for money of electricity higher than last year but it still ranks below other comparable services.

- NSW households are more positive about the value for money of their electricity services than last year (up 6% to 60%).
- Value for money ratings for all other utilities have increase in the past year, with internet (up 8% to 75%) and water up 7% (to 80%).

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'



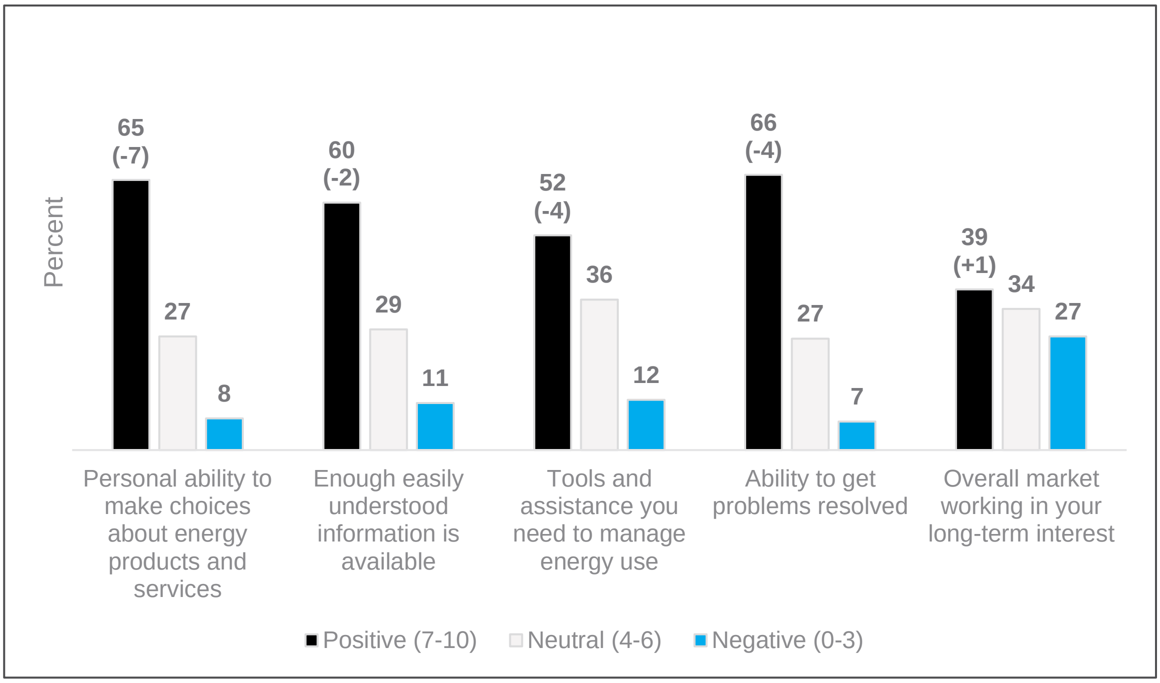
Base: Consumers in NSW with these services

Confidence in information, tools and a working market

NSW consumers are less confident than a year ago in their ability to make choices about electricity products and services.

- 65% of NSW household consumers are confident in their ability to make choices about their energy services (down 7%).
- 66% are now confident in their ability to get problems resolved, and 60% are confident there is enough easily understood information available.
- Household consumers in NSW are less confident that there are tools and assistance to help them manage their energy use (52%) and just 39% are confident that the overall market is working in their long-term interest.

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in NSW (n=406)

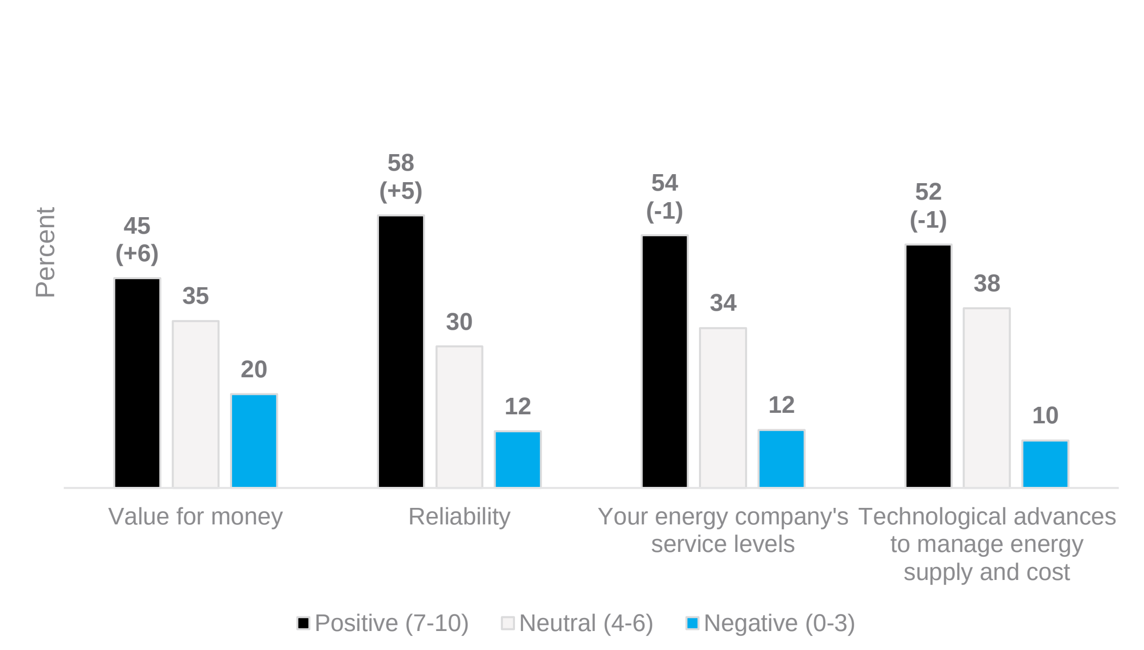
Confidence in long term outcomes

Consumers are more confident that the market will provide better value for money in the future compared with December 2019.

- 45% of NSW household consumers say they are confident that value for money outcomes will improve in the future (up 6%) and 58% say they are confident that the reliability of their energy service will improve (up 5%).
- 54% say they are confident their energy company's service levels will improve in the future.
- 52% say they are confident in the likelihood of future technological advances to manage energy supply and costs.

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'



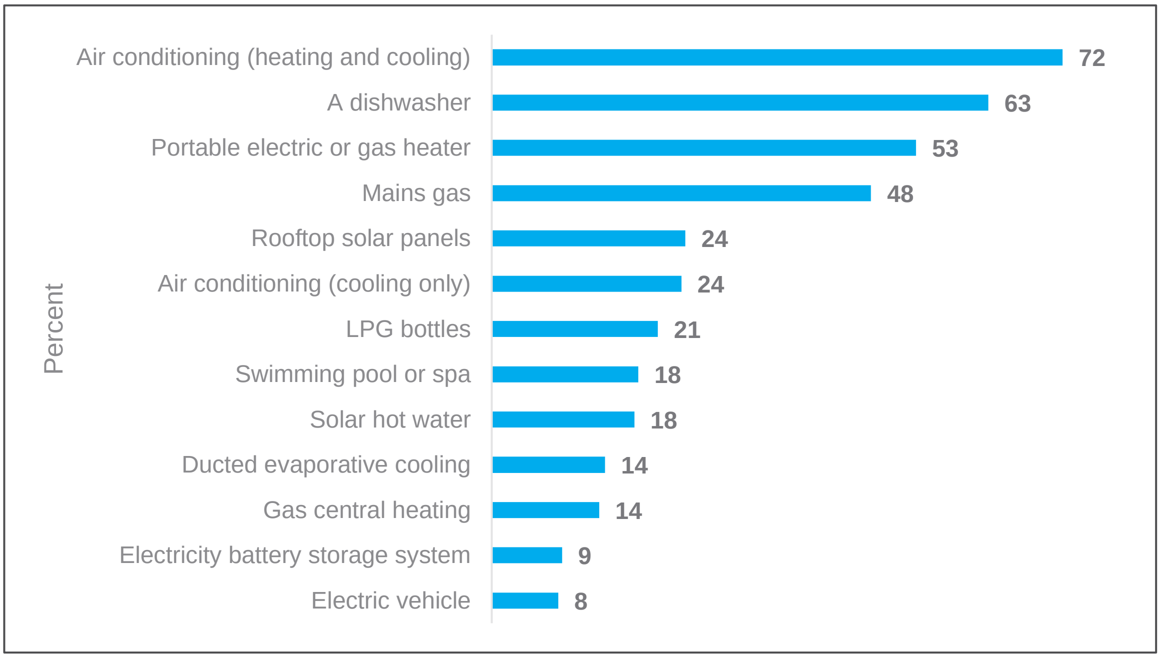
Base: Consumers in NSW (n=406)

Uptake of technologies

The proportion of NSW households using technology to control their energy costs has increased slightly over the past year.

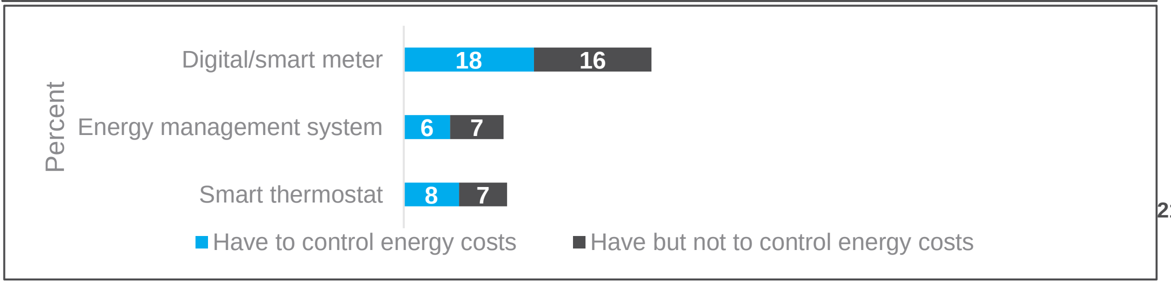
- 34% say they have a digital/smart meter (31% last year), and over half of these consumers use it to manage their energy use and costs.
- 15% have a smart thermostat and 13% have a home management system.
- Use of rooftop solar panels remains at 24% (no change from last year).
- 8% of households now say they own an electric car (up from 3% last year).

Which of the following do you have at your home? (%)



Base: Consumers in NSW (n=406)

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=406)

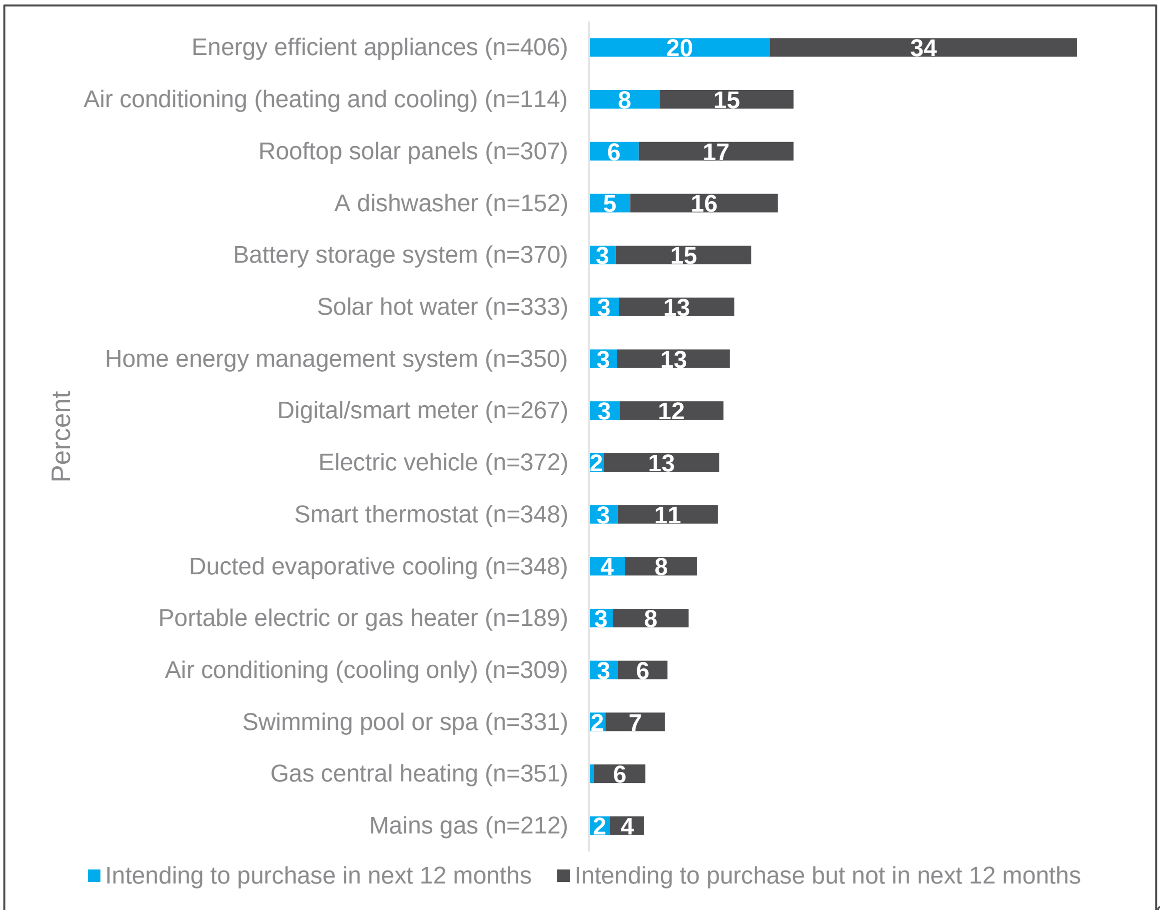
Activity

Future uptake of technologies

There has been a general drop in the proportion of NSW household consumers reporting interest in purchasing energy related technology in the future.

- The proportion of households intending to purchase energy efficient appliances is at 54% (down 6%), with 20% planning 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 (down 6%) including 6% in the next 12 months.
- 18% of those without battery storage plan to purchase a system (down 12%) including 3% in the next 12 months.
- Of the households who report having solar panels, 43% have expressed interest in adding electricity battery storage systems to their homes (down 19%).

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

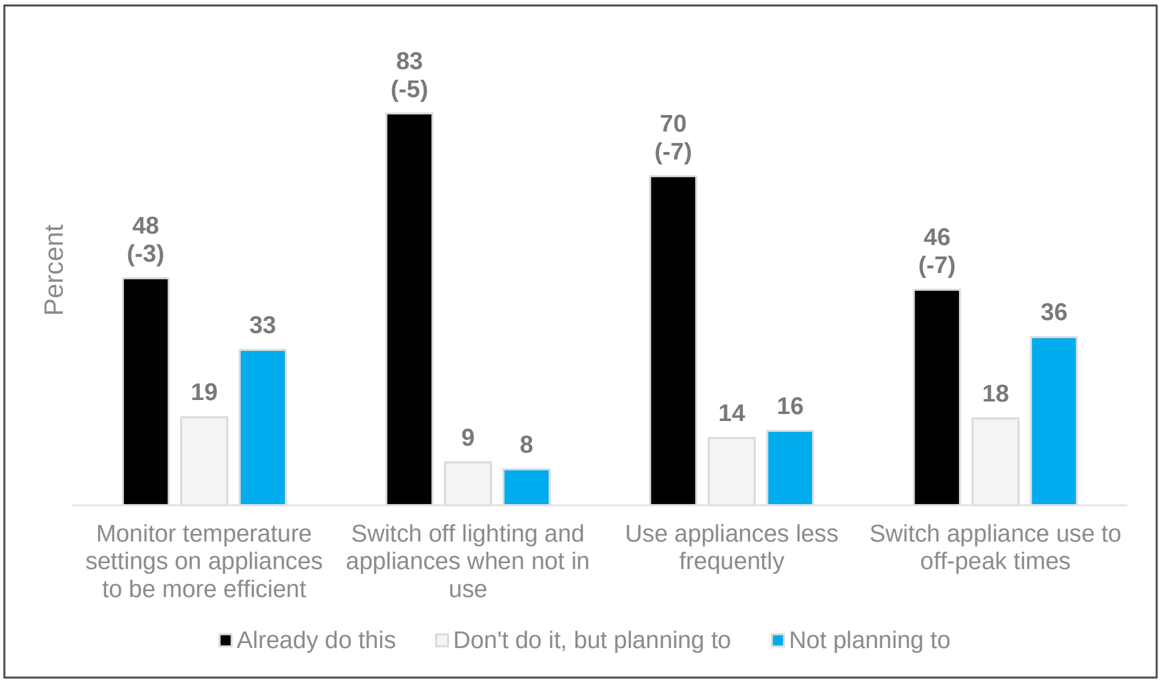
Note: For readability, percentages have been omitted where they are less than 2%

Energy saving practices

The proportion of NSW household consumers who say they are already undertaking energy saving practices has decreased in the past year.

- 83% say they already switch off lighting and appliances when not in use (down 5%).
- 70% say they already use appliances less frequently to conserve energy (down 7%).
- 48% say they monitor temperature settings on appliances to be more efficient .
- 46% say they already switch appliance use to off-peak times (down 7%).

Which of the following do you do or plan to do? (%)



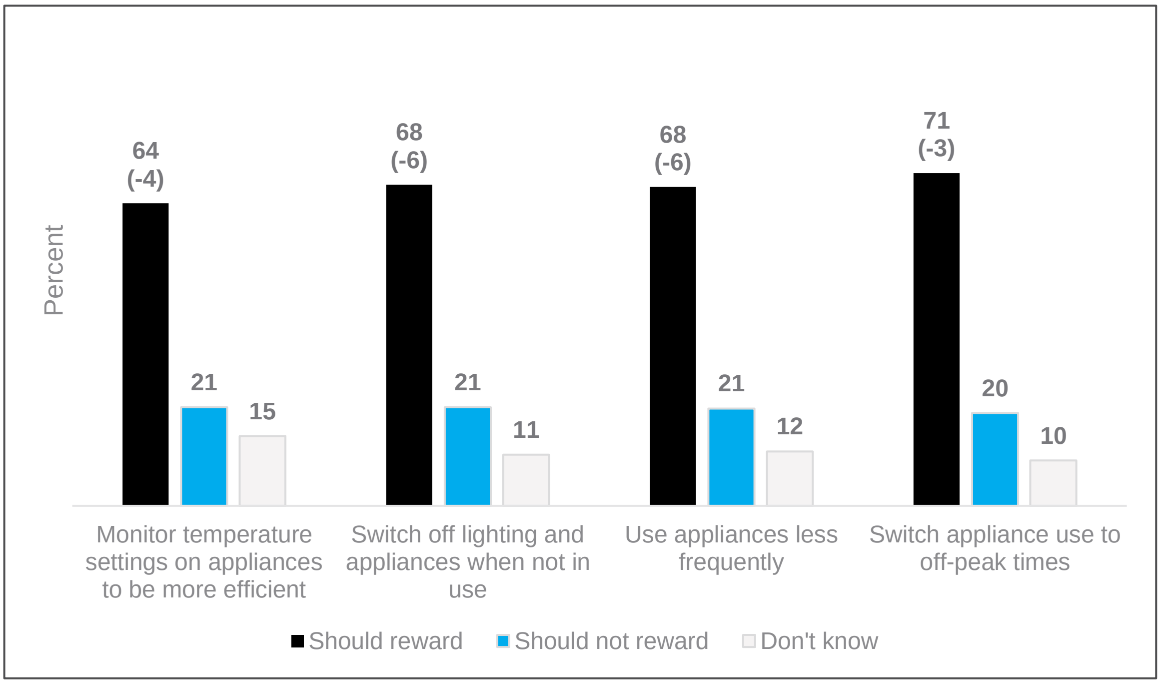
Base: Consumers in NSW (n=406)

Reward for reducing energy use

A majority of NSW households would like to see energy companies do more to reward consumers for taking action to reduce energy use or switching their use to off-peak times.

- While most households think energy companies should reward customers who take action to minimise their usage, there has been a fall in the level of this support.
- 68% think electricity companies should do more to financially reward customers who use appliances less frequently (down 6%) and the same proportion think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (also down 6%).
- 71% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 64% think electricity companies should do more to financially reward customers who monitor temperature settings on appliances to be more efficient.

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



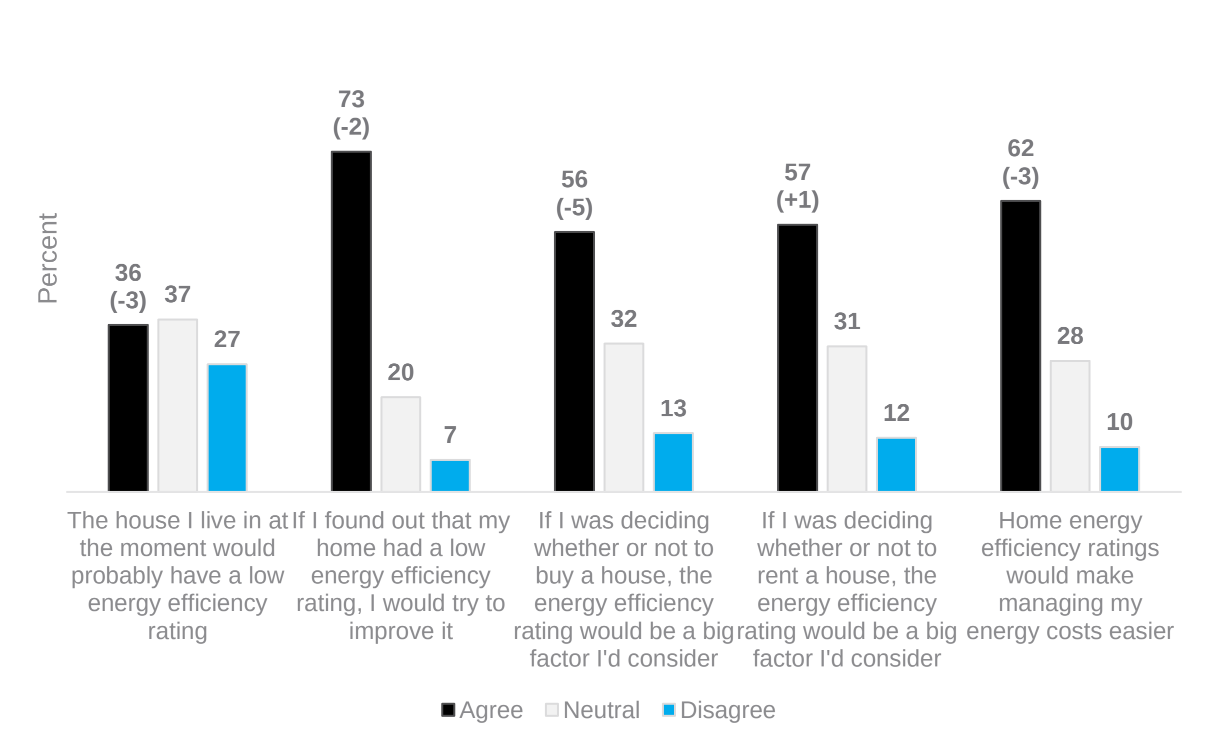
Base: Consumers in NSW (n=406)

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.

- 73% of homeowners say they would try to improve their home's energy rating if they found out it had a low rating and 62% say a home energy efficiency rating would make managing their energy costs easier.
- 56% say an energy rating would be a big factor they would consider when buying a house (down 5%).
- 57% of renters say an energy rating would be a big factor they would consider when renting a house.
- Over a third of households agree that the house they live in would have a *low* energy efficient rating (36%).

Do you agree or disagree with the following? (%)



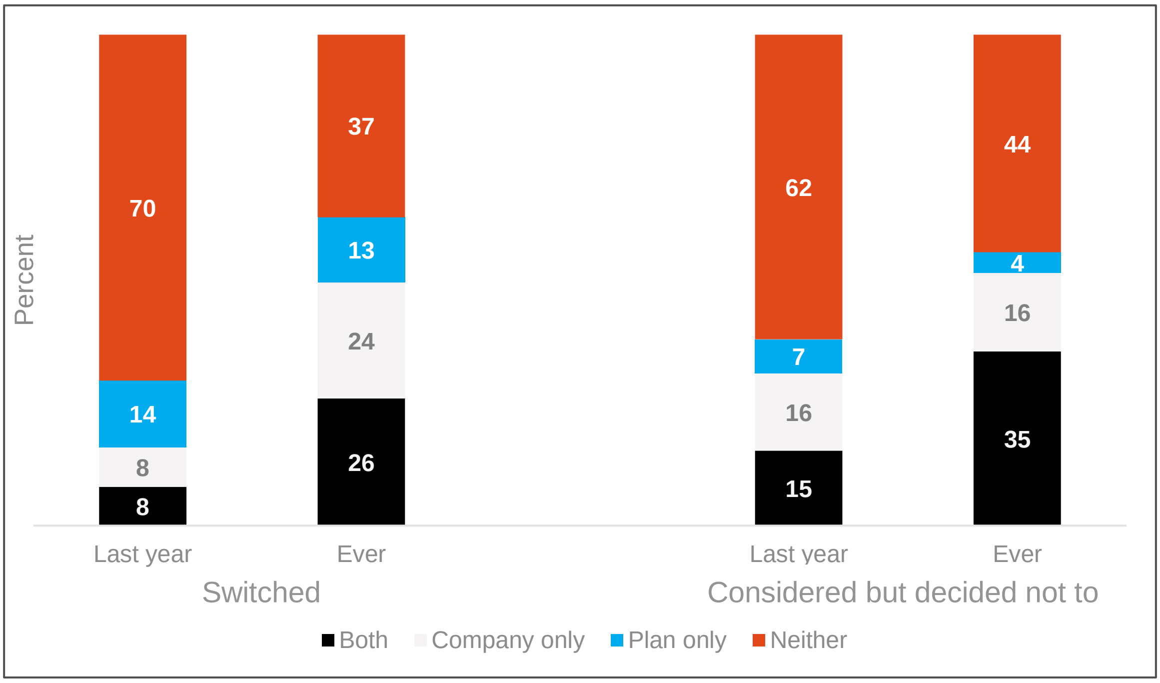
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in NSW (n=406)
Base for 'I would try to improve my home energy efficiency': Homeowners in NSW (n=262)
Base for 'consider energy rating when renting': Renters in NSW (n=138)

Switching behaviour

The majority of NSW household consumers did not switch energy companies or plans in the past year.

- 70% of consumers stuck with their current provider and plan in the past year, 8% switched both provider and plan, 8% switched provider only, and 14% switched plans with the same provider.
- 37% report that they have never switched companies or plans.
- 38% say they considered switching companies or plans in the past year but did not do so at the time.

Which of the following have you done? (%)



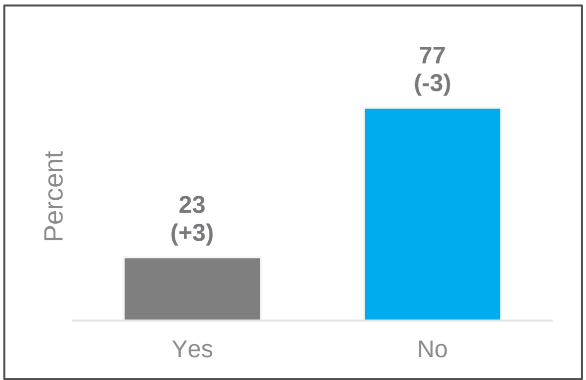
Base: Consumers in NSW (n=406)

Reasons for considering switching

Dissatisfaction with the value for money from their retailer is the main reason for switching energy companies among NSW consumers.

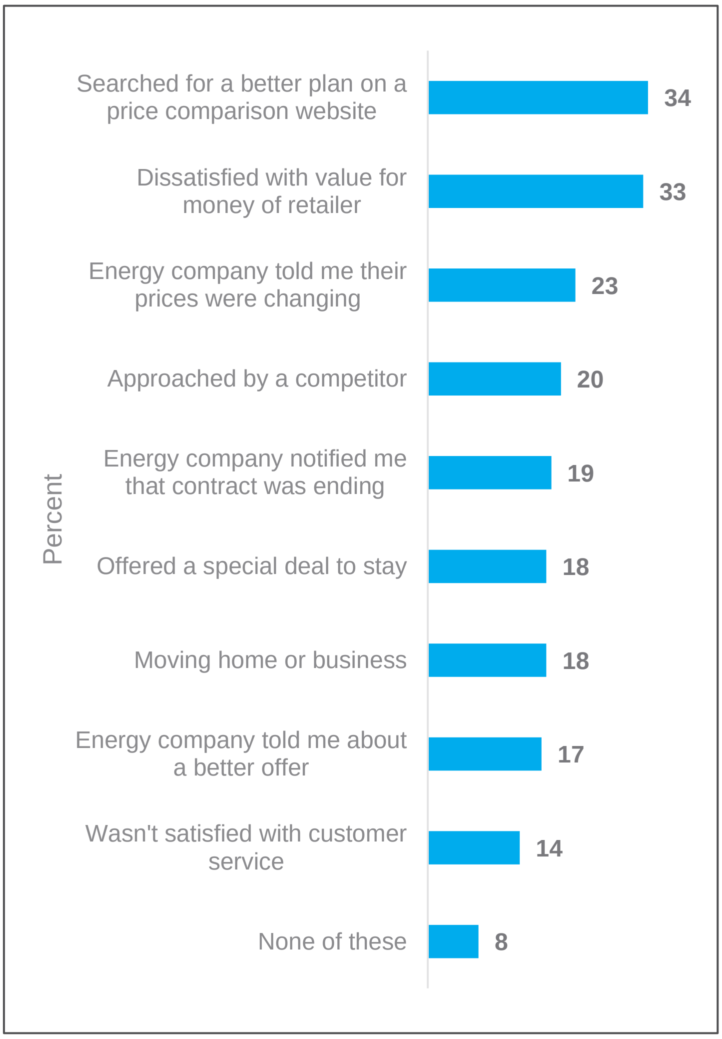
- 34% of those who looked at switching in the past say they searched for a better plan on a comparison website (up 8%)
- 33% said they were dissatisfied with the value for money they were getting from their energy company when they considered switching.
- 23% say they intend to switch plans or retailers in the next year.

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



Base: Consumers in NSW (n=406)

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



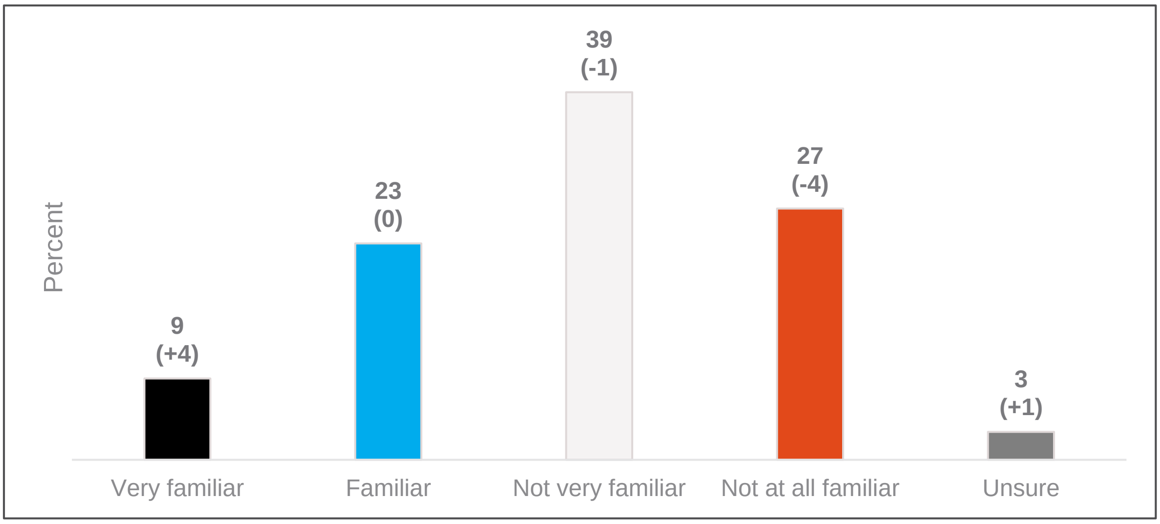
Base: Consumers in NSW who have switched or looked at switching in the past (n=269)

Awareness of the Energy Ombudsman

There has been an increase in the proportion of NSW consumers who say they are very familiar with the Energy Ombudsman.

- 32% said they were very familiar (9%) or familiar (23%) with the Energy Ombudsman.

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



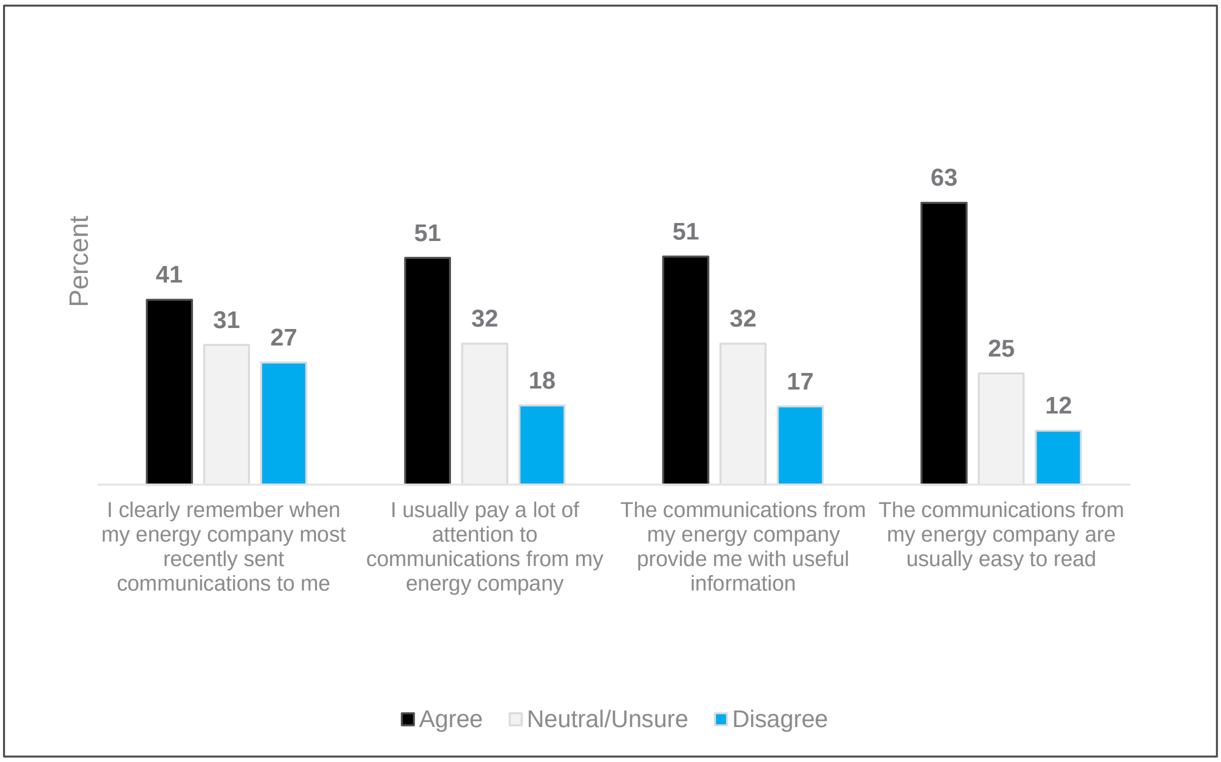
Base: Consumers in NSW (n=406)

Communications from energy providers

Two-thirds of NSW household consumers agree that the communications they receive are easy to read.

- 63% of households agreed communications from their energy company is generally easy to read.
- Only 51% agreed that communications provided by their energy company is useful.
- Engagement with communications from energy companies is relatively low. Less than half (41%) clearly remember when their energy company last sent communications to them, and just over half (51%) say they usually pay a lot of attention to the communications.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



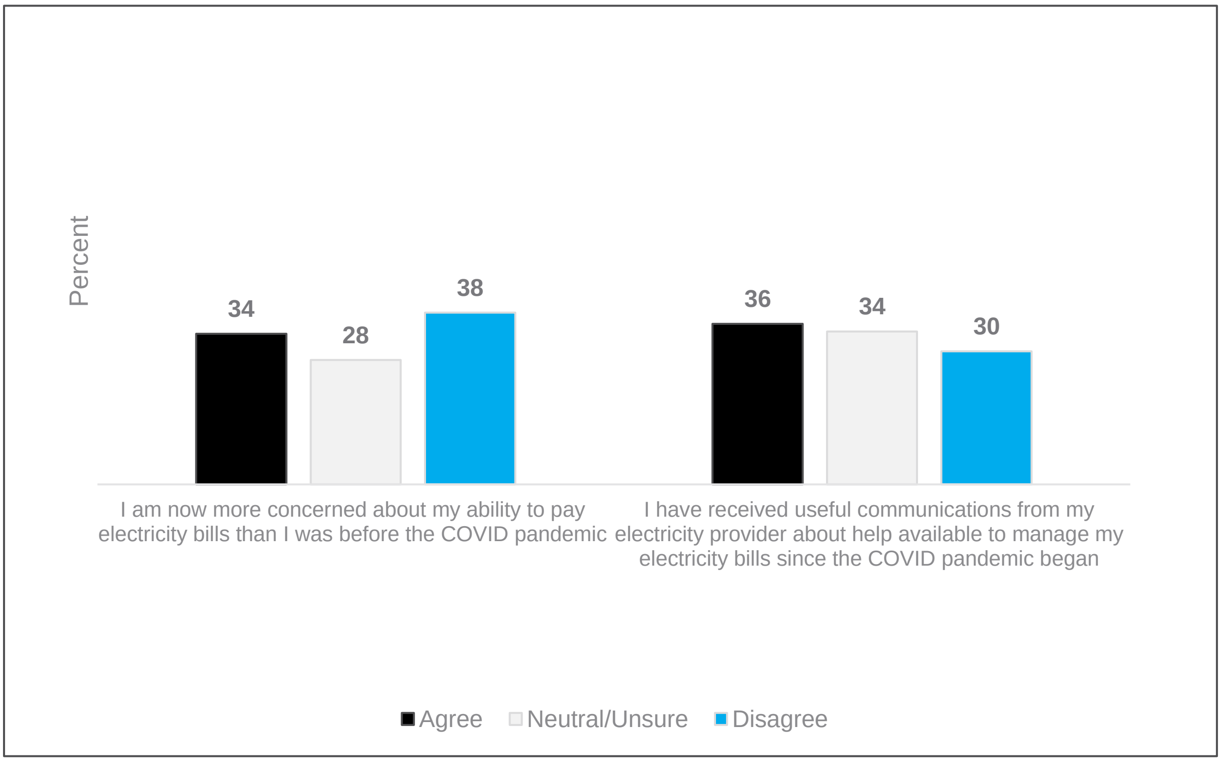
Base: Consumers in NSW (n=406)

Other

Effects of COVID-19

- **A third of NSW households agree that they are now more concerned about how to pay electricity bills than before the start of the COVID-19 pandemic (34%).**Only 36% say they have received useful communications from their electricity provider about how to manage bills during the pandemic.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



Base: Consumers in NSW (n=406)

Asking for help from electricity provider

30% of NSW households have asked for help to manage their electricity bills since the pandemic began or expect to do so in the future.

- Of the 17% of households who have already asked for help from their electricity provider, about half say they did not receive any useful assistance.
- 13% of households have not yet asked for help but expect to require assistance in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)

Base: Consumers in NSW (n=406)

Victoria

Overall satisfaction

Three-quarters of Victorian households are satisfied with the provision of electricity and gas services overall.

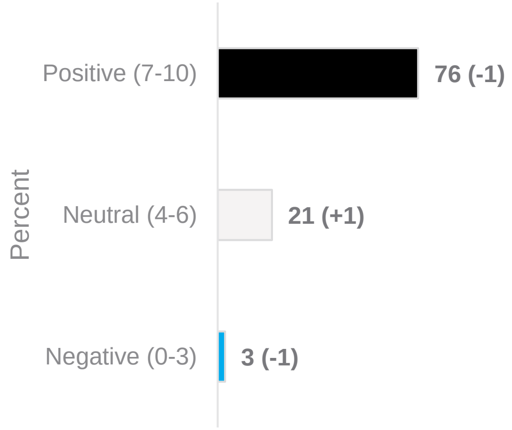
- 76% are satisfied with their electricity and gas services.

Satisfaction with the level of competition is consistent with last year.

- 59% are positive about the level of competition in the energy market in their area.

Overall Satisfaction

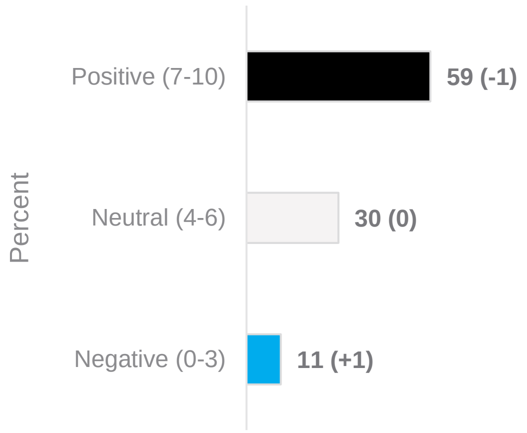
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in VIC (n=425)

Satisfaction with competition

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



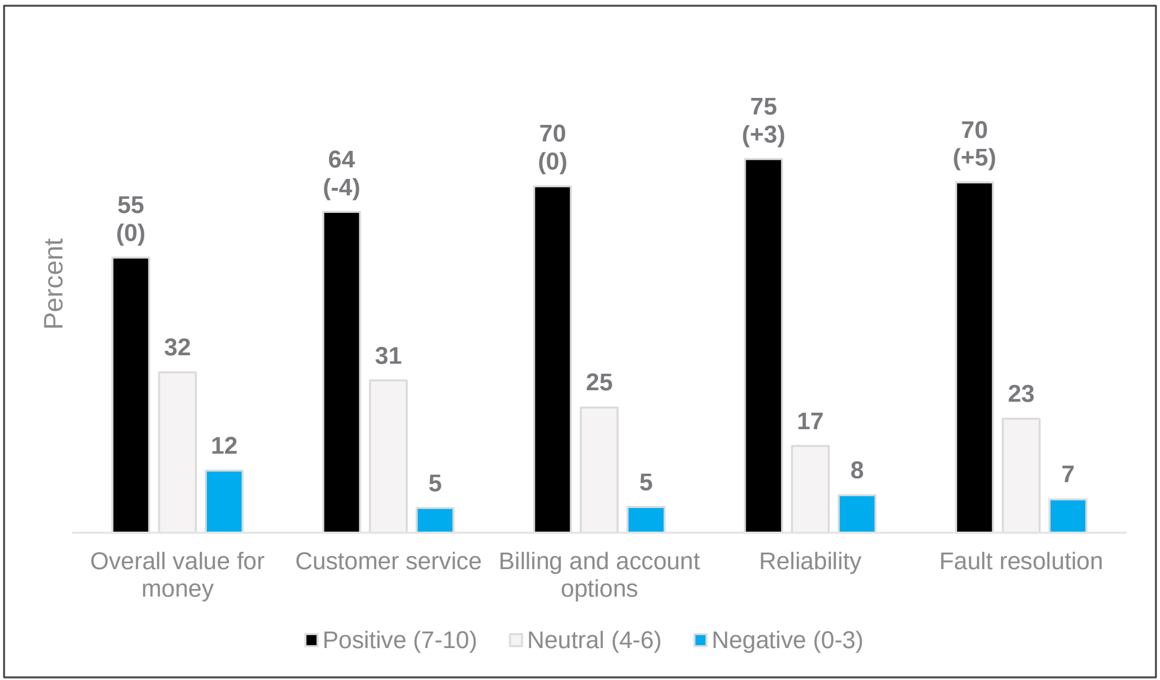
Base: Consumers in VIC (n=425)

Satisfaction with electricity

Victorian household consumers are as satisfied with the value for money from their electricity as they were last year.

- 55% are satisfied with the overall value for money of their electricity, but this is the least satisfying aspect of their electricity service.
- Among consumers who experienced a power outage, 70% are satisfied with fault resolution (up 5%).
- 75% are satisfied with the reliability of their electricity supply.
- 70% are satisfied with their billing and account options (unchanged).
- 64% are satisfied with the customer service they receive from their energy provider.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



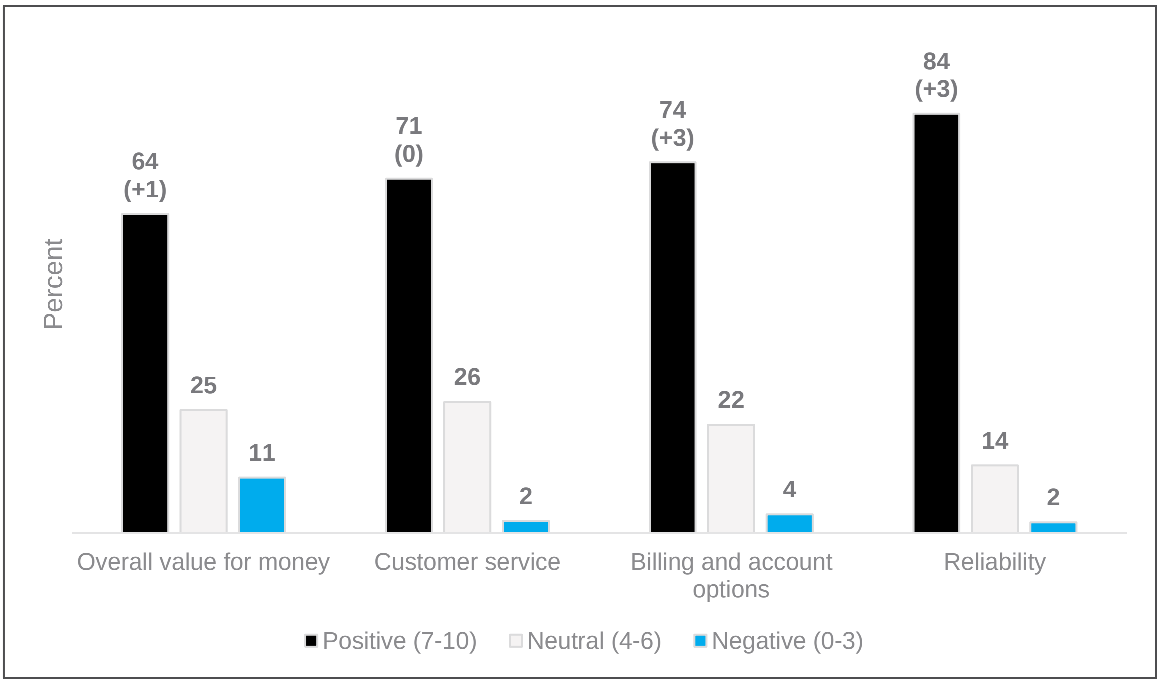
Base: Consumers in VIC with electricity supply (n=425)
Base for fault resolution: Those in VIC who rated 0 to 9 satisfaction and had a power outage (n=223)

Satisfaction with gas

Satisfaction with the value for money of gas products and services is steady compared with last year.

- 64% are satisfied with the value for money of their gas service.
- 84% are satisfied with the reliability of their gas service.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Consumers in VIC with gas supply (n=368)

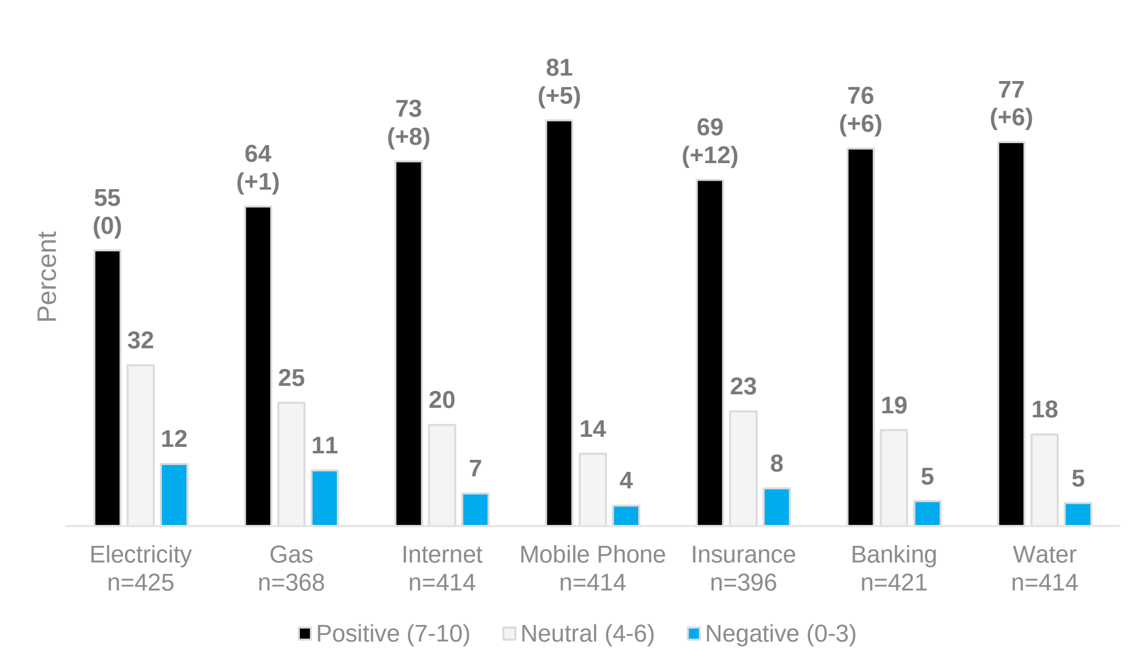
Rating of utilities and services

Among Victorians, the gap has widened between the level of satisfaction with electricity and gas services and the other services compared in this survey.

- Households' satisfaction with the value for money of electricity and gas services are behind all other utilities at 55% for electricity and 64% for gas.
- Value for money has increased in the past year for all other utilities tested, particularly insurance (69%, up 12%) and internet provision (73%, up 8%).
- Household consumers believe the value for money from water (77%, up 6%), banking services (76%, up 6%) and mobile phone providers (81%, up 5%) have also improved.

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'



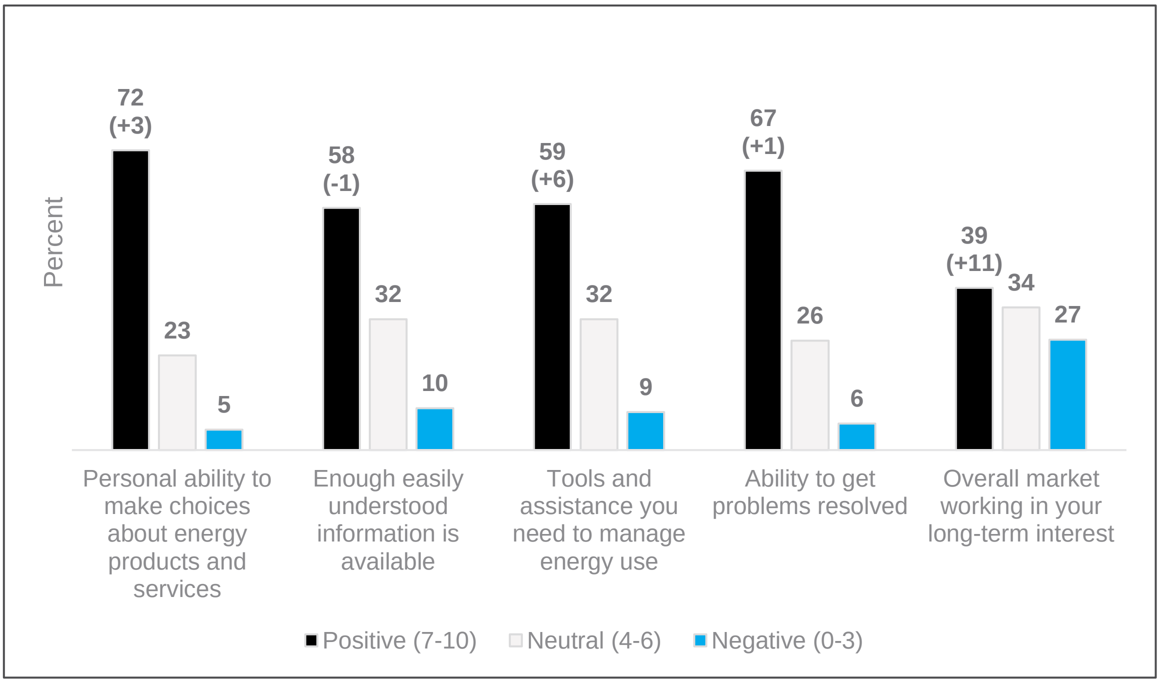
Base: Consumers in VIC with these services

Confidence in information, tools and a working market

Consumer confidence that the market is working in consumers' interests has increased but remains low.

- 39% of Victorian households are now confident the overall market is working in their long-term interests (up 11%)..
- Only 59% of Victorian consumers are confident they can find the tools and assistance they need to manage their energy use (up 6%).
- 7% are confident about their ability to get problems resolved and 58% are confident there is enough easily understood information available to support their decision making about energy products and services.

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in VIC (n=425)

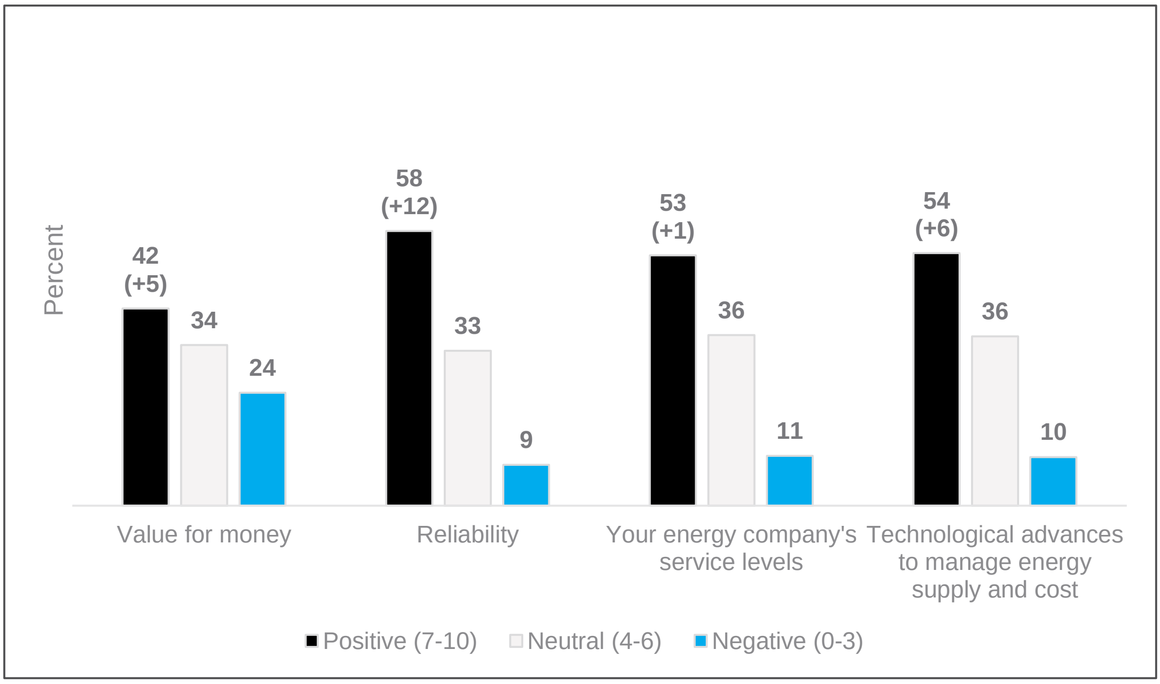
Confidence in long term outcomes

There has been an increase in confidence about future outcomes, but less than half of Victorian consumers are confident the energy market will deliver better value for money in the future.

- Confidence in improved long-term value for money for energy services has increased by 5% (to 42%).
- Confidence that the reliability of energy supply will improve in the future has increased to 58% (up 12%), while confidence in technological advances to manage energy supply and cost is now at 54% (up 6%).
- 53% of Victorian households are confident that customer service outcomes will improve in the future.

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'



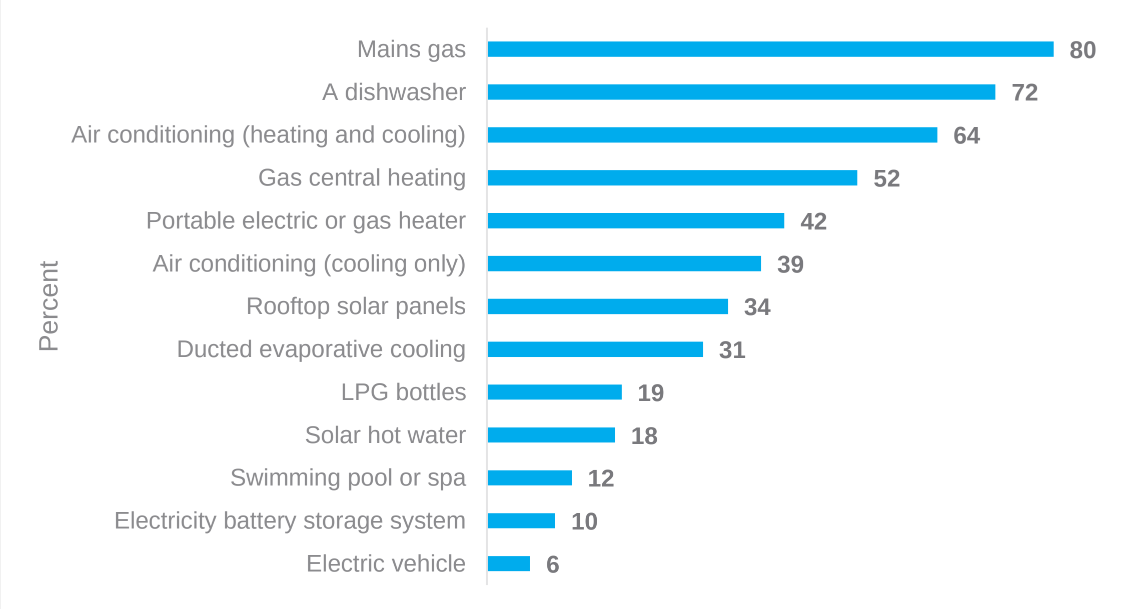
Base: Consumers in VIC (n=425)

Uptake of technologies

More Victorian households have adopted energy specific technology.

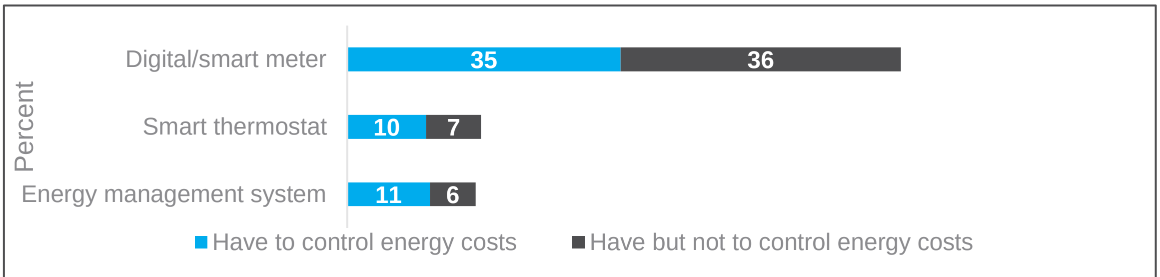
- Electric vehicle ownership has increased from 3% to 6% in the past year.
- 71% of Victorian respondents say they have a digital/smart meter in their home, and around half of these households say they use it to control their energy costs (35%).

Which of the following do you have at your home? (%)



Base: Consumers in VIC (n=425)

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

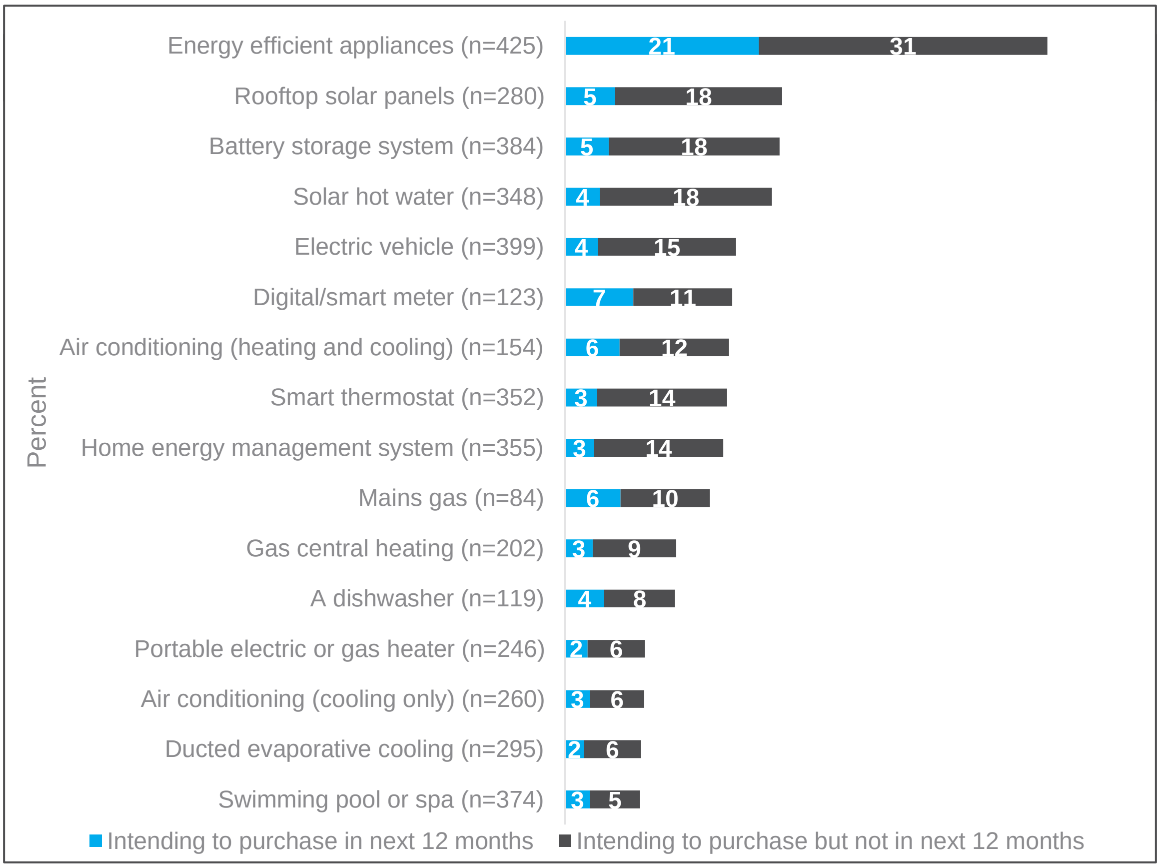


Base: Consumers in VIC (n=425)

Future uptake of technologies

Fewer Victorian households are interested in purchasing new technologies in the future compared with December 2019.

- Of those who do not currently have solar panels, 23% say they are considering installing them, including 5% who say they intend to do so in the next 12 months.
- Of those households who report having solar panels, 46% expressed interest in adding battery storage systems.
- Energy efficient appliances are the product most likely to be considered in the next 12 months (21%).



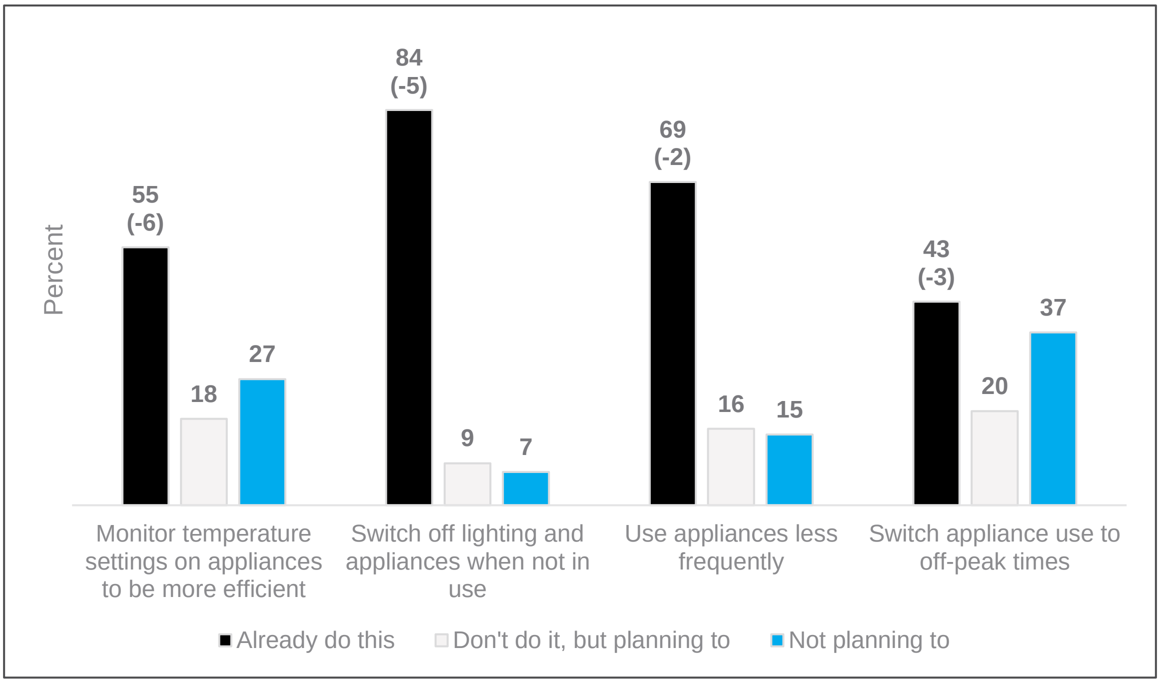
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Victoria

Energy saving practices

The proportion of Victorian household consumers who say they are already undertaking energy saving practices has declined.

- 84% say they switch off lighting and appliances when not in use (down 5%).
- 55% say they are monitoring temperature settings on appliances to be more efficient (down 6%).
- 69% say they are using appliances less frequently.
- Switching appliance use to off-peak times is the least observed behaviour, with 43% saying they are already doing this.

Which of the following do you do or plan to do? (%)



Base: Consumers in VIC (n=425)

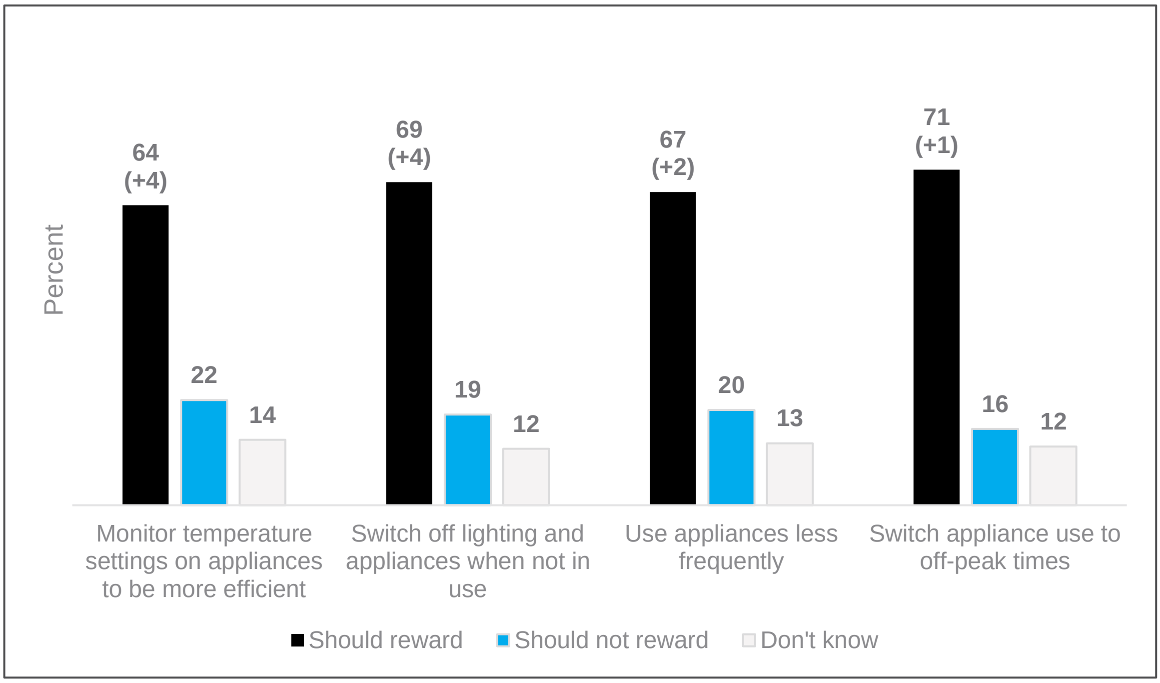
Activity

Reward for reducing energy use

The majority of Victorian household consumers want energy companies to do more to reward consumers for taking action to reduce their energy usage or shift their use outside peak times.

- A growing proportion of households think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (71%), switch off lighting and appliances when not in use (69%), use appliances less frequently (67%) and monitor temperature setting on appliances to be more efficient (64%).

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



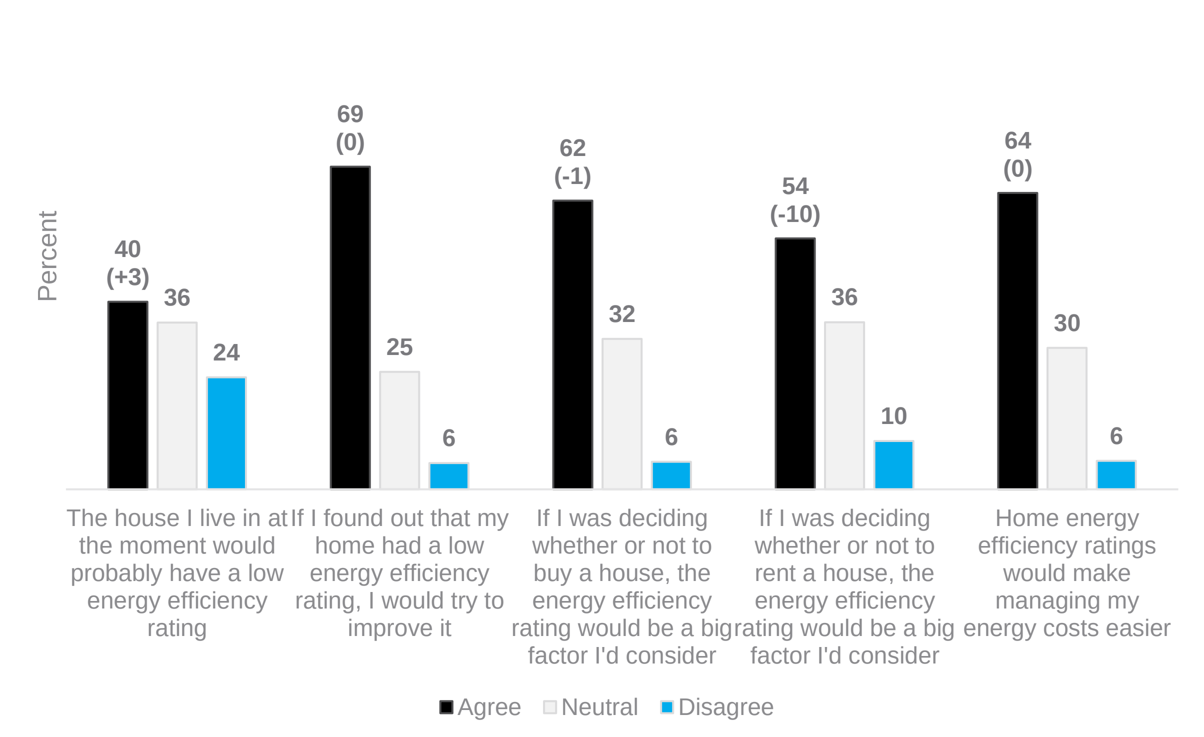
Base: Consumers in VIC (n=425)

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.

- 69% of homeowners say they would try to improve their home's energy rating if they found out it had a low rating (unchanged from last year), and 40% agree that the house they live in at the moment would probably have a *low* energy efficiency rating.
- 54% of renters say that an energy rating would be a big factor they would consider when renting a house (down 10%).
- 64% say that a home energy efficiency rating would make managing their energy costs easier (unchanged from last year) and 62% say 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? (%)



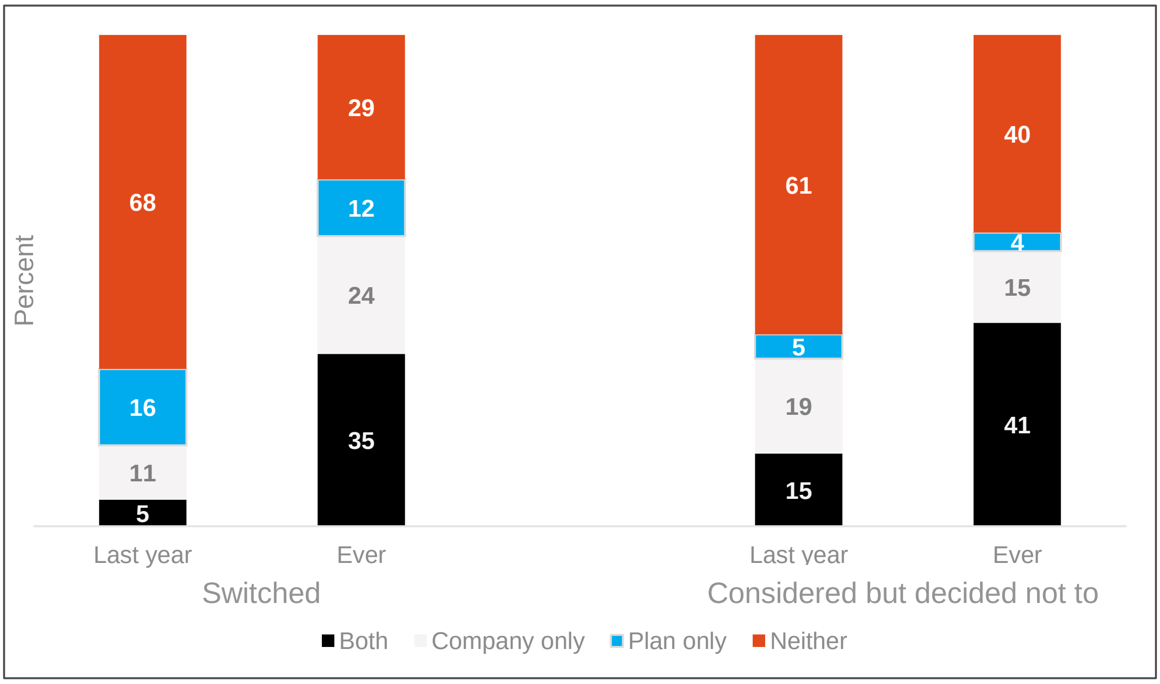
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in VIC (n=425)
Base for 'I would try to improve my home energy efficiency': Home-owners in VIC (n=318)
Base for 'consider energy rating when renting': Renters in VIC (n=106)

Switching behaviour

Around a third of Victorian household consumers report having switched companies or plans in the past year.

- 32% say they have either switched company (11%), switched plan (16%), or switched both (5%) in the past 12 months.
- A further 39% of Victorian household consumers considered switching in the past year but did not do so.
- 29% say they have never switched companies or plans.

Which of the following have you done? (%)



Base: Consumers in VIC (n=425)

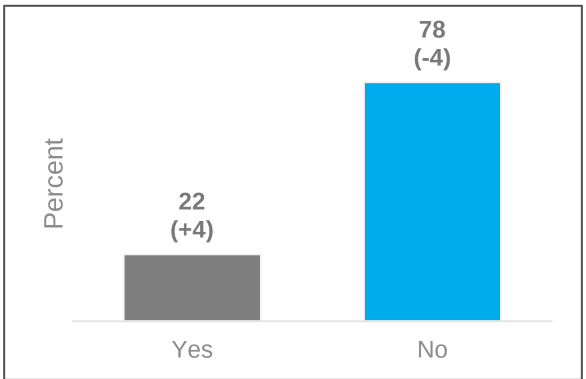
Activity

Reasons for considering switching

Dissatisfaction with their retailer's value for money was the most common reason for considering switching.

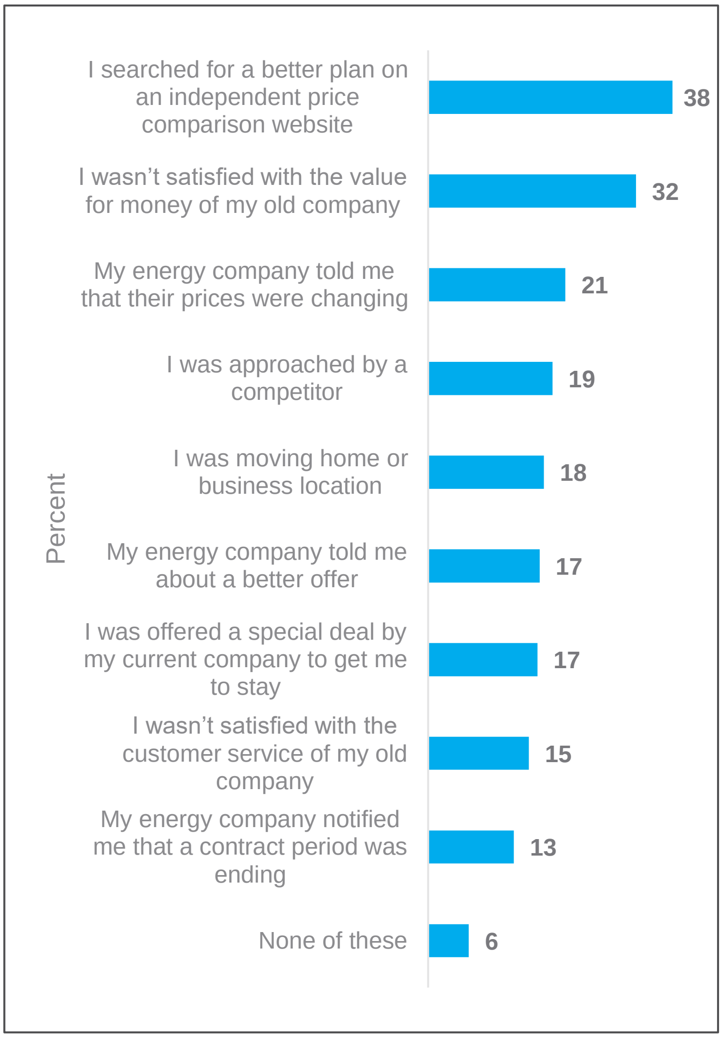
- 38% of those who have looked at switching energy companies did so after searching for a better plan on a comparison website.
- 32% said they were not satisfied with the value for money offered from their old company.
- 22% of all Victorian household consumers say they intend to switch energy plans or providers in the next year

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



Base: Consumers in VIC (n=425)

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



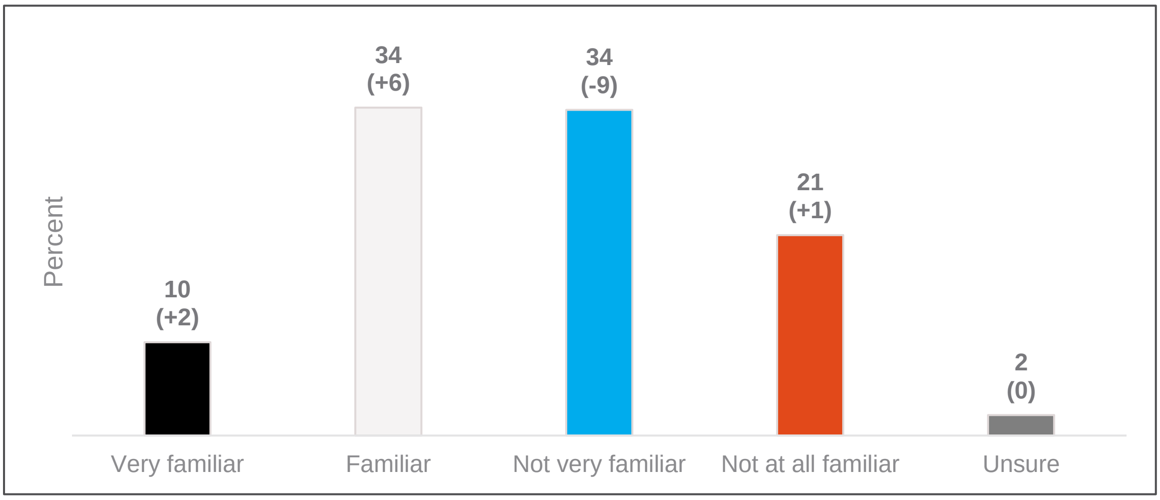
Base: Consumers in VIC who have switched or looked at switching in the past (n=304)

Awareness of the Energy Ombudsman

Victorians are more familiar with the Energy Ombudsman than last year.

- 44% said they were either very familiar (10%) or familiar (34%) with the Energy Ombudsman (up 8% overall)

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



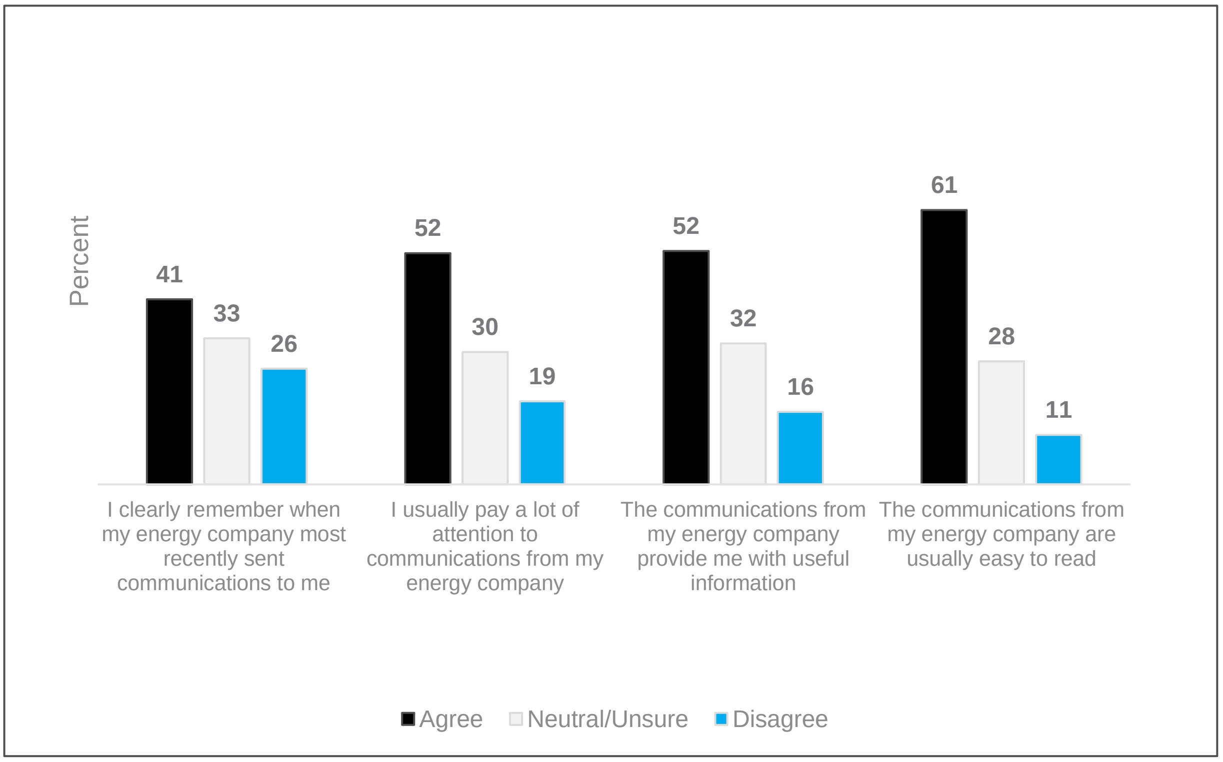
Base: Consumers in VIC (n=425)

Communications from energy providers

Less than two-thirds of Victorian household consumers agree that the communications they receive from their energy company are easy to read.

- 61% agree that communications from energy companies are easy to read, while half (52%) agreed that the communications are useful.
- Engagement with communications from energy companies is relatively low. Less than half (41%) clearly remember the last communication, and just over half (52%) say they usually pay a lot of attention to communications.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



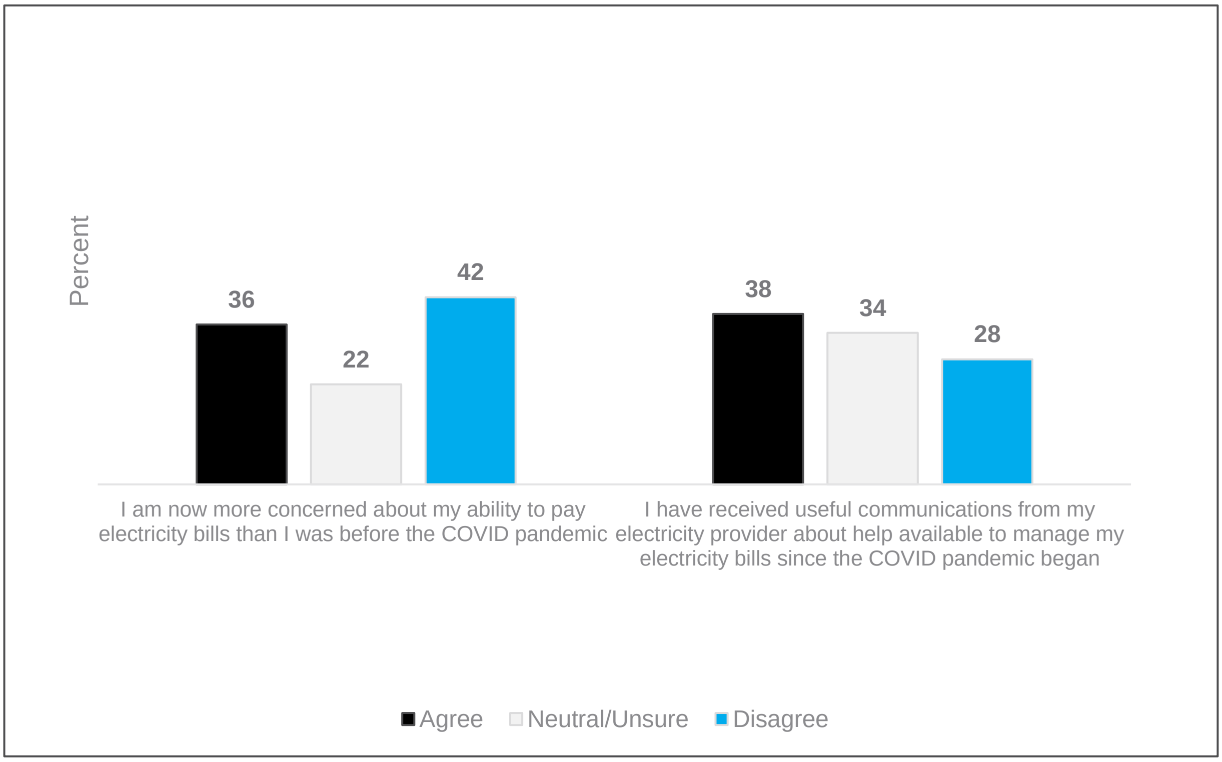
Effects of COVID-19

Victoria has the highest proportion of households who are concerned with their ability to pay household bills.

Base: Consumers in VIC (n=425)

- More than one-third of Victorian households (36%) agree they are more concerned about how to pay electricity bills than they were before the start of the COVID-19 pandemic.
- 38% say they have received useful communications from their electricity provider about how to manage bills during the pandemic, with 28% disagreeing.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



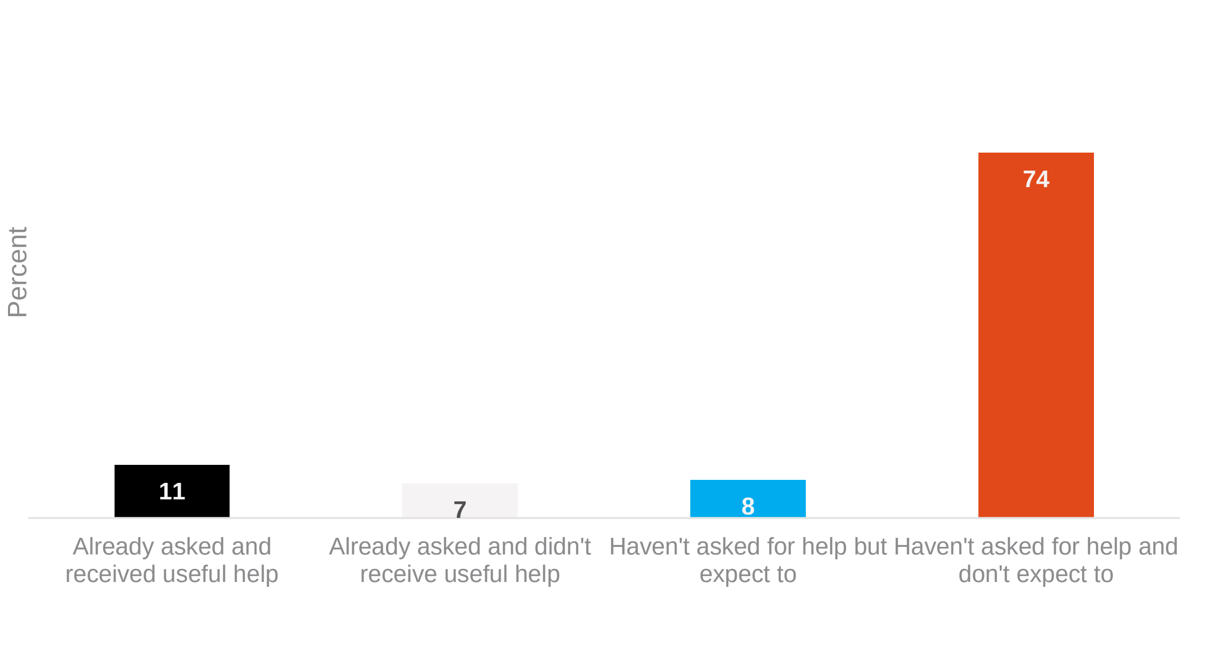
Base: Consumers in VIC (n=425)

Asking for help from electricity provider

Around 4 in 10 Victorian households who asked their electricity provider for help to manage their electricity bills during the pandemic say they did not receive useful assistance.

- Of the 18% of households who have already asked for help from their electricity provider,11% received useful assistance, and 7% did not find the help useful.
- 8% of households have not yet required assistance yet but expect to in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)



Base: Consumers in VIC (n=425)

Queensland

Overall satisfaction

Queensland household consumers are more satisfied with the provision of electricity and gas services overall.

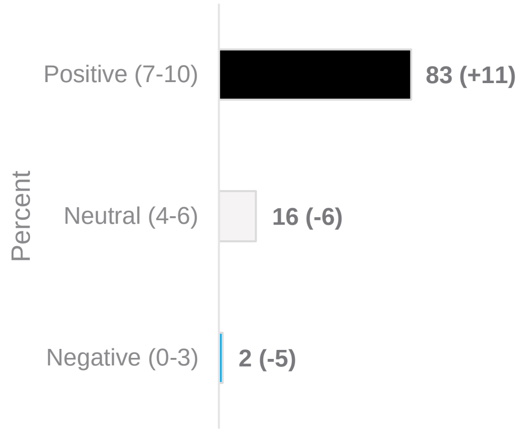
- 83% of households are now satisfied with the provision of energy (up 11%).

Satisfaction with the level of competition has also increased in the past year.

- 59% say they are satisfied with the level of competition in their area (up 11%).

Overall Satisfaction

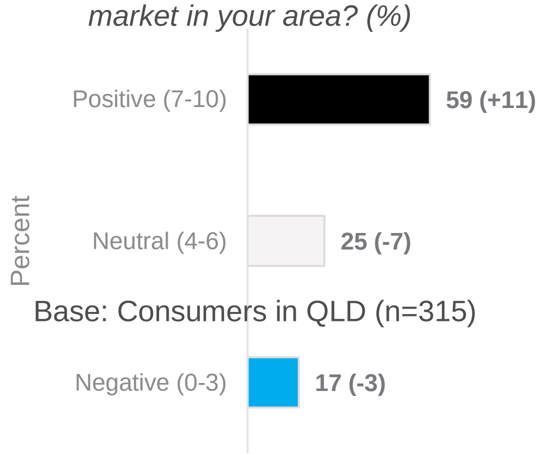
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in QLD (n=315)

Satisfaction with competition

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



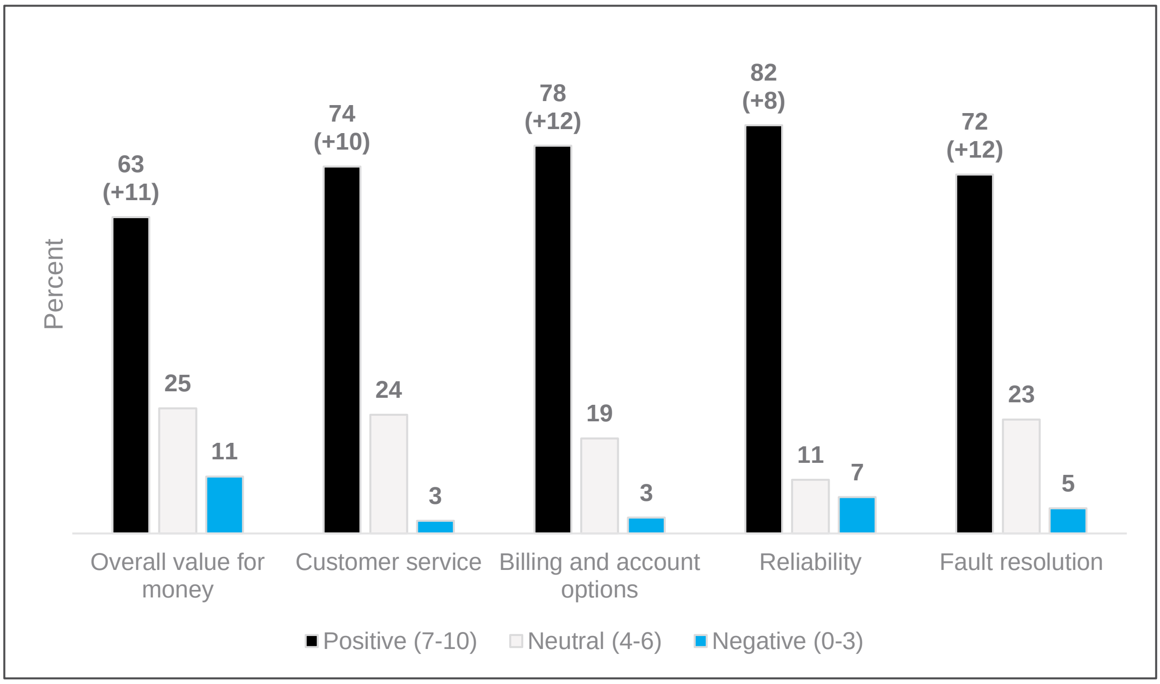
Base: Consumers in QLD (n=315)

Satisfaction with electricity

Queensland electricity consumers are more satisfied with all elements of their electricity service compared to last year.

- There were large improvements in satisfaction with billing and account options (78%, up 12%), value for money (63%, up 11%) and reliability of service (82%, up 8%).
- 72% of those who experienced a power outage were satisfied with the fault resolution (up 12%).

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



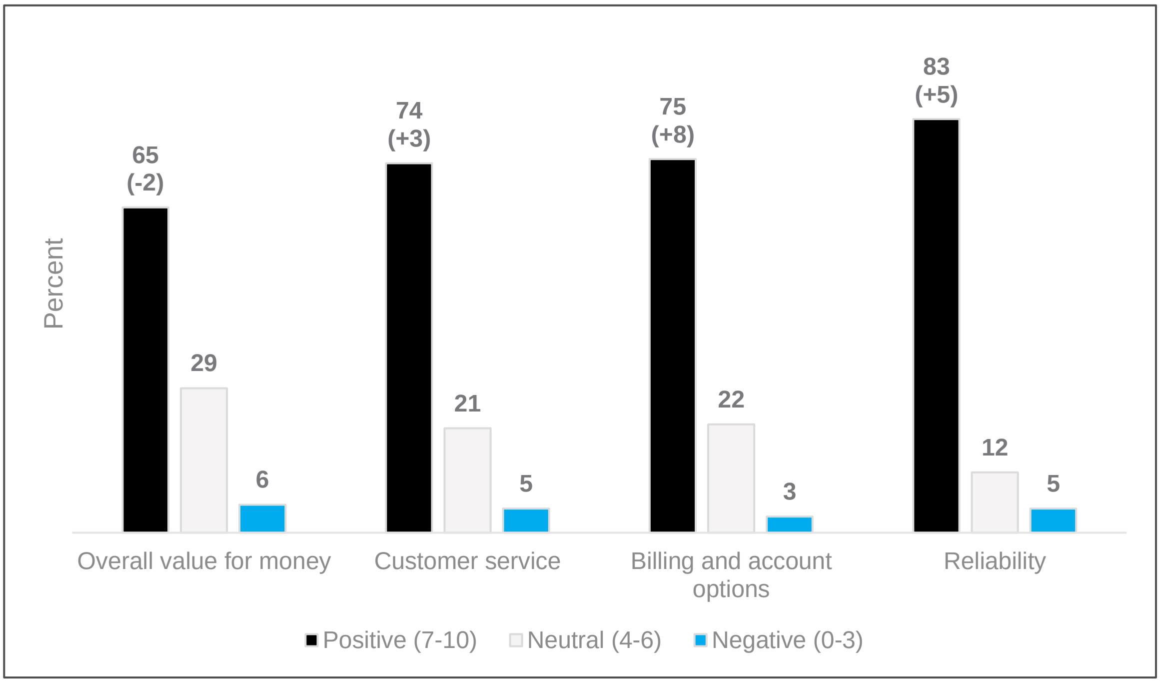
Base: Consumers in QLD with electricity supply (n=315)
Base for fault resolution: Those in QLD who rated 0 to 9 satisfaction and had a power outage (n=118)

Satisfaction with gas

Queensland household consumers' satisfaction with gas account options and reliability has increased.

- 83% of households are now satisfied with the reliability of their gas network (up 5%) and 75% say they are satisfied with their billing and account options (up 8%).
- There is 65% satisfaction with the overall value for money of their gas service.
- 74% say they are satisfied with the customer service provided by their gas supplier.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Consumers in QLD with gas supply (n=124)

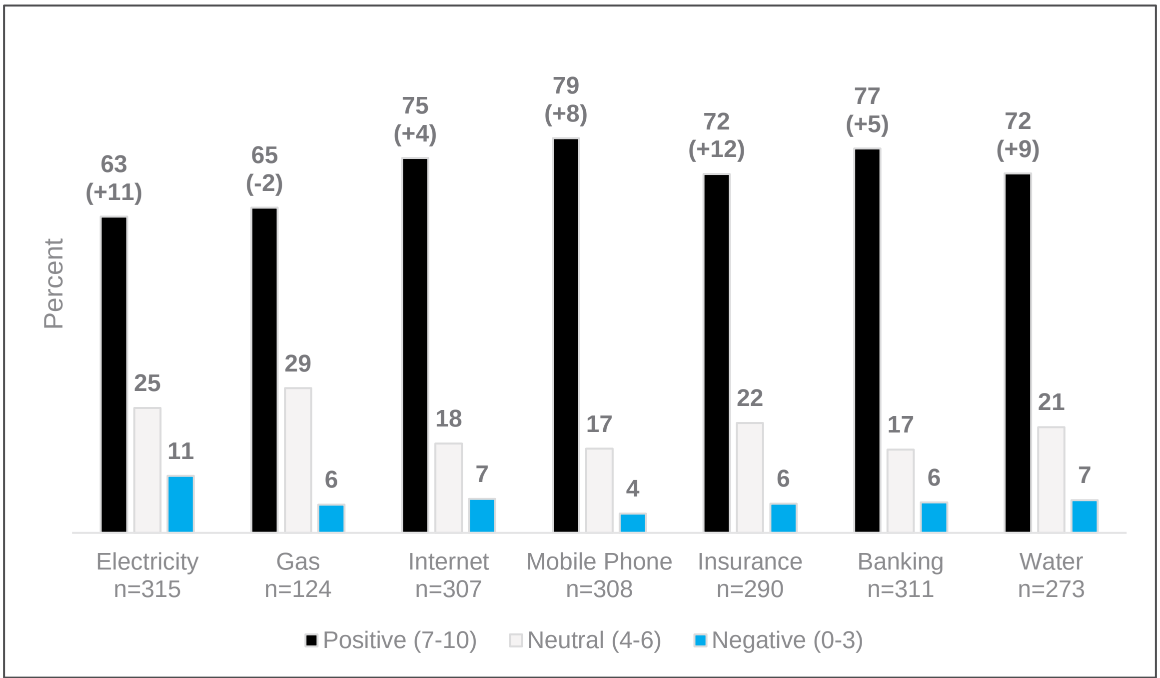
Rating of utilities and services

Queensland household consumers rate the value for money from their electricity higher than they have been at any point in the survey's history, although it still trails other comparable services.

- 63% (up 11%) rate the value for money of electricity services positively, while 65% give positive ratings to the value for money of gas (also up 11%)
- Value for money ratings have also increased for insurance (72%, up 12%), water (72%, up 9%) mobile phones (79%, up 8%) and banking (77%, up 5%).

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'



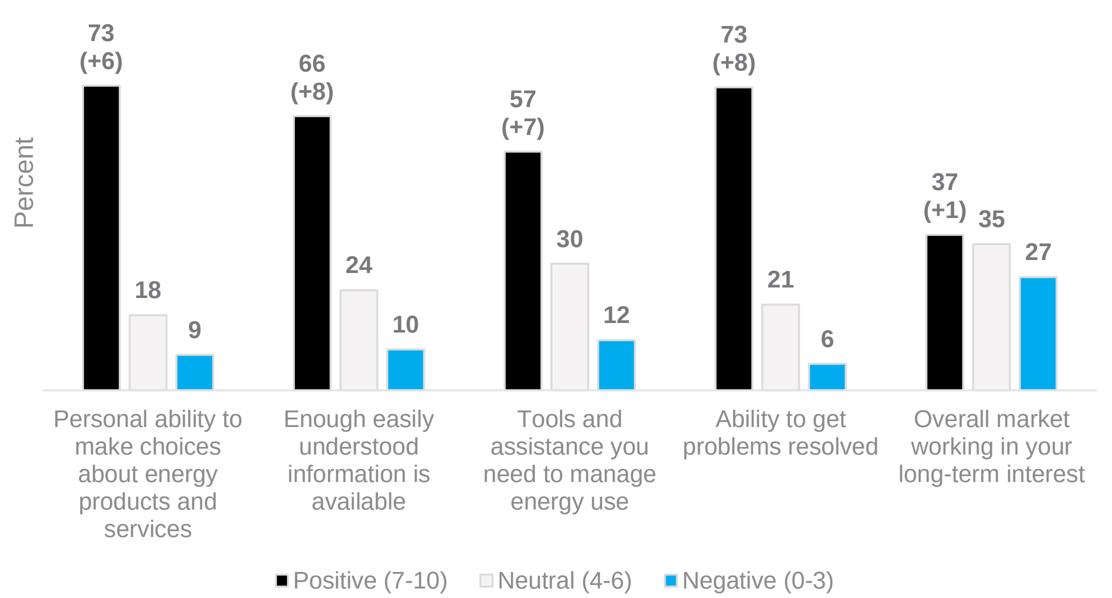
Base: Consumers in QLD with these services

Confidence in information, tools and a working market

Queensland household consumers expressed greater confidence in their ability to get problems resolved, find information, their ability to make choices and get tools to manage energy use.

- Consumers' confidence in their ability to get problems resolved has increased by 8% to 73%, while confidence that there is easily understandable information available also increased by 8% to 66%.
- Consumers' confidence that they have the tools and assistance to manage their energy use has increased to 57% (up 7%).
- Consumers' confidence in their personal ability to make choices increased to 73% (up 6%).
- Consumers' confidence that the overall market is working in their long-term interests is at 37%.

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in QLD (n=315)

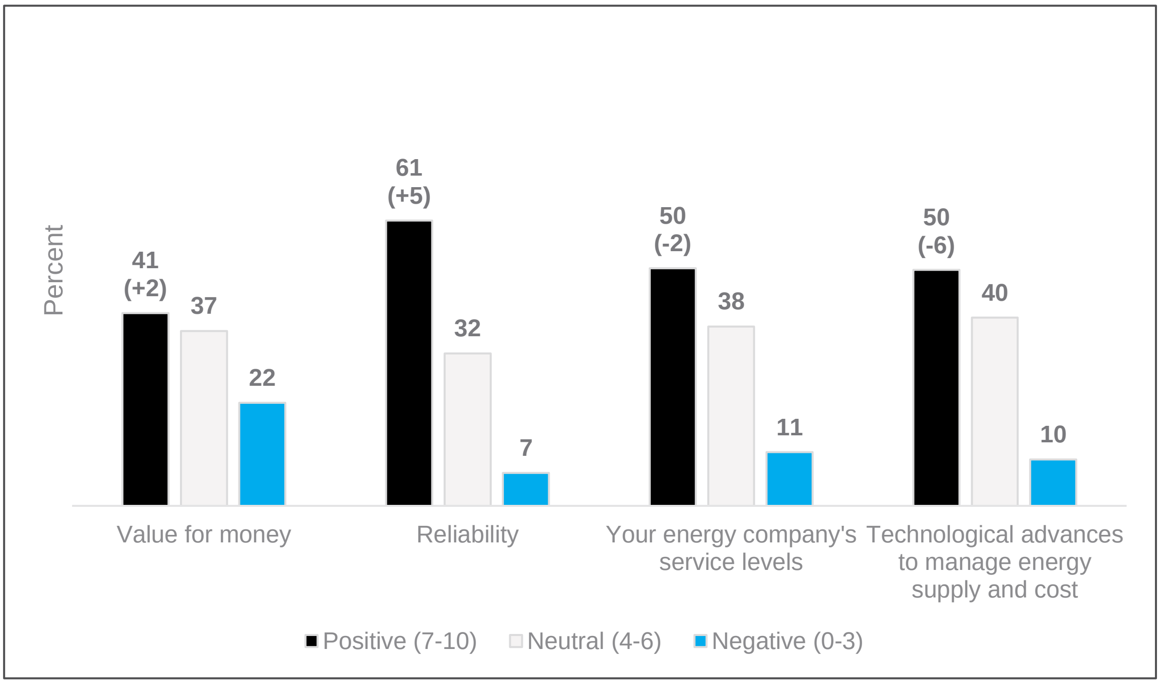
Confidence in long term outcomes

Less than half of Queensland household consumers are confident the market will provide better value for money outcomes in the future.

- 41% of households are confident of better value for money outcomes in the future.
- Most households are confident that the reliability of their energy services will improve further in the future (61%, up 5%).
- The proportion confident that future technological advances will improve their ability to manage their energy use and costs has decreased by 6% 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…? (%)

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



Base: Consumers in QLD (n=315)

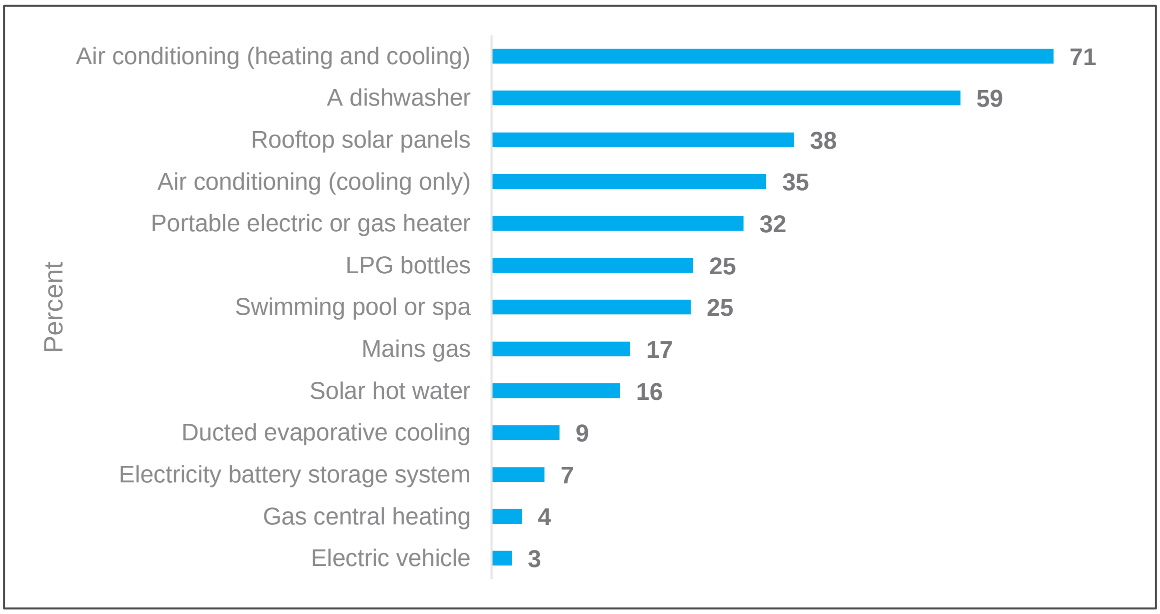
Confidence

Uptake of technologies

A growing proportion of Queensland household consumers say they have a digital/smart meter, and around half say they use it to control their energy costs.

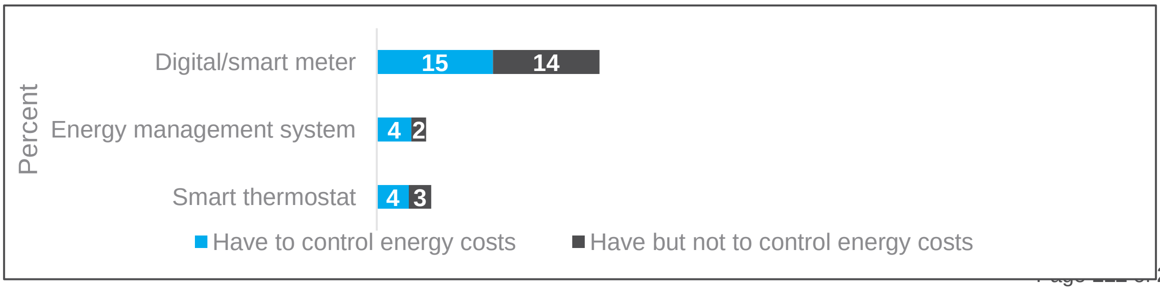
- 29% say they have a smart/digital meter (up 7%) and half of those (15%) say they use it to manage their energy use and costs.
- Most households in Queensland have a heating and cooling air conditioning unit (71%) and a dishwasher (59%).
- Only South Australia (46%) has a higher proportion of households who say they have rooftop solar than Queensland (38%).

Which of the following do you have at your home? (%)



Base: Consumers in QLD (n=315)

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



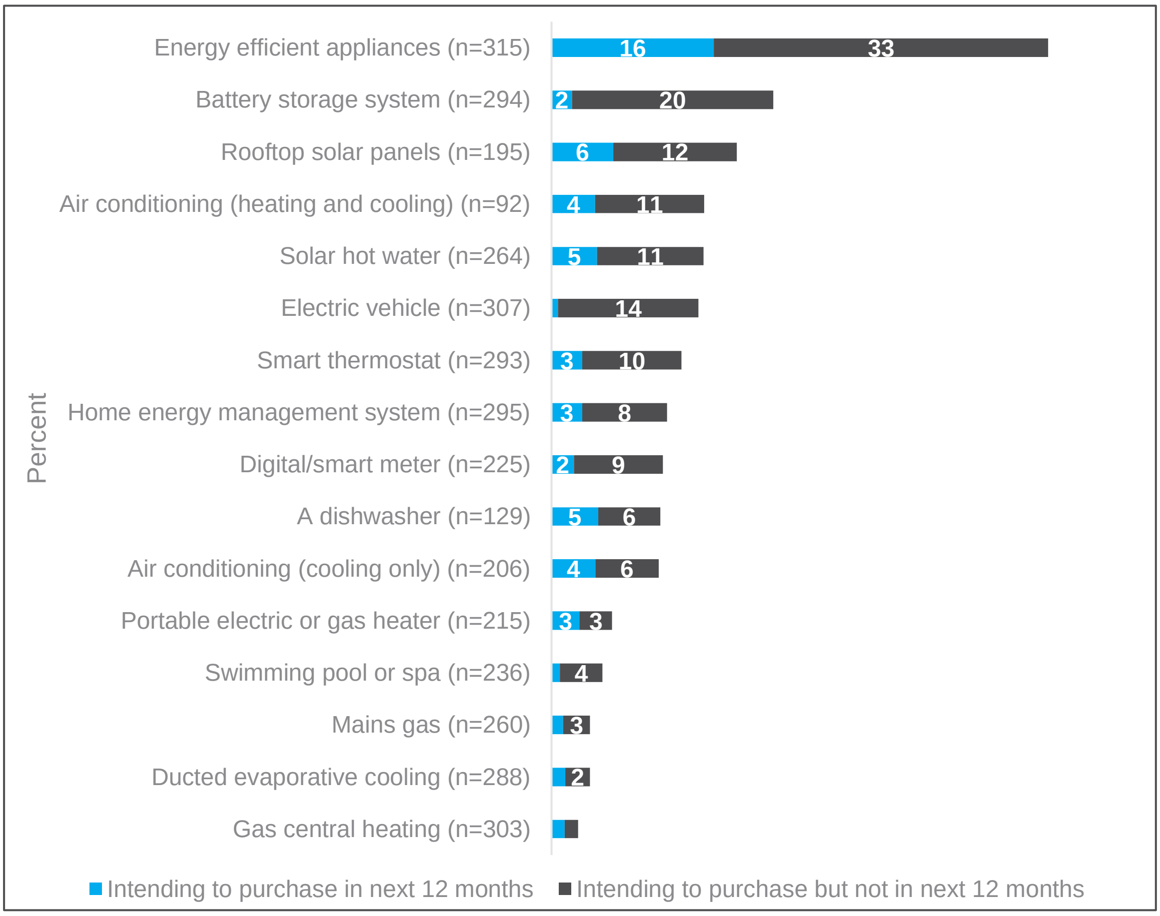
Base: Consumers in QLD (n=315)

Future uptake of technologies

There has been a drop in the proportion of Queensland household consumers intending to purchase new technology to manage their energy use.

- 49% say they are considering purchasing energy efficient appliances (down 8%), and 16% plan to do so in the next 12 months.
- 22% of Queensland households are interested in a battery storage system – including 2% who are looking to purchase in the next 12 months.
- 40% of Queenslanders with rooftop solar panels expressed an intention to purchase a battery storage system (down 7%).

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

Note: For readability, percentages have been omitted where they are less than 2%

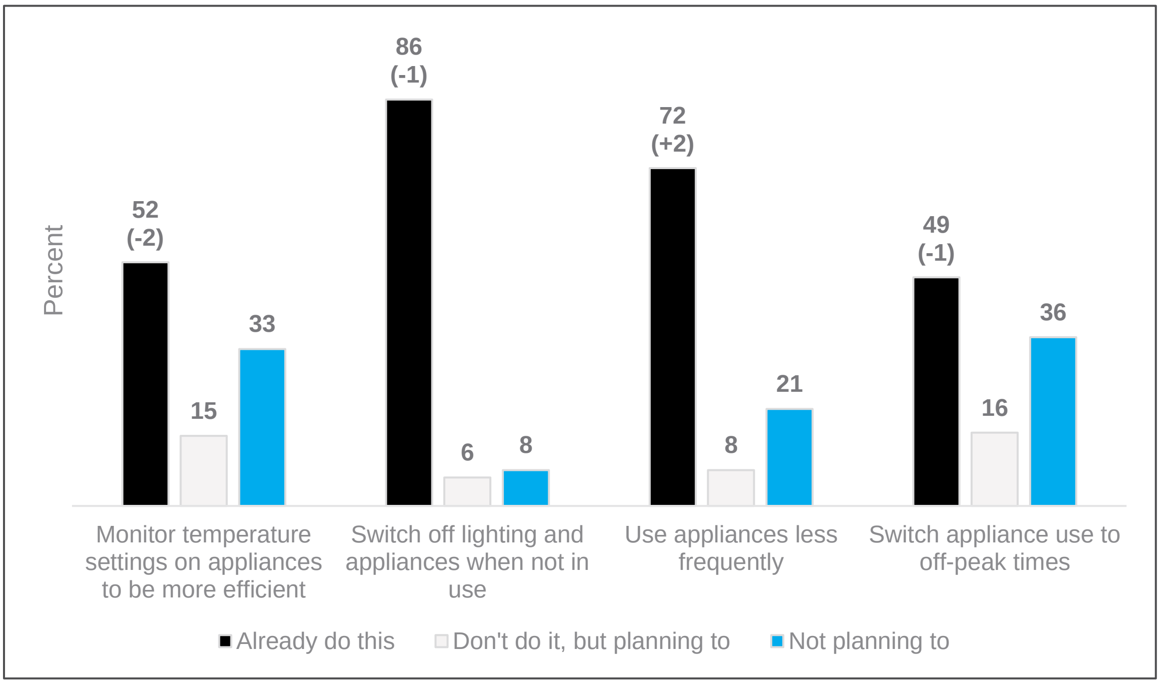
Activity

Energy saving practices

The majority of Queenslanders are taking action to manage their energy use.

- The most common actions to save energy are to switch off lights and appliances when not in use (86%) and using appliances less frequently (72%).
- Half of all consumers say they already monitor temperature settings (52%) and switch their appliance use to off-peak times (49%).

Which of the following do you do or plan to do? (%)



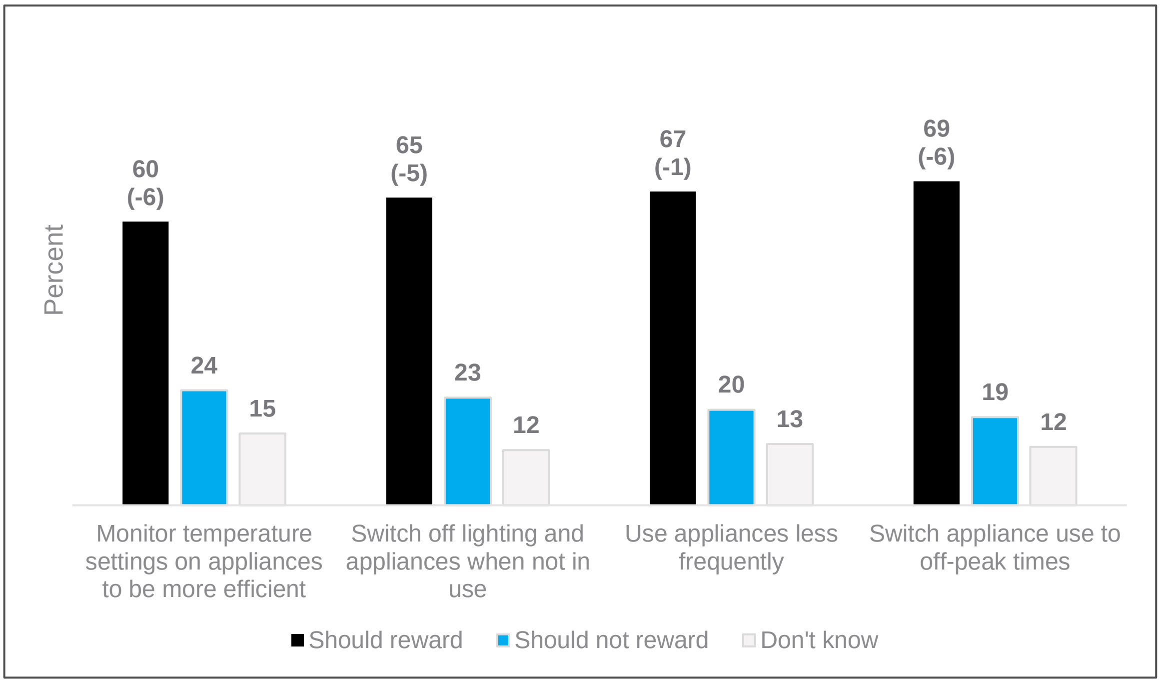
Base: Consumers in QLD (n=315)

Reward for reducing energy use

Although around two-thirds of Queensland household consumers think energy efficient behaviours should be rewarded, there have been declines in those who think electricity companies should do more to financially reward customers.

- The proportion of consumers who think they should be rewarded for switching appliance use to off-peak times has fallen to 69% (down 6%).
- 65% think they should be rewarded for switching off lighting and appliances when not in use (down 5%).
- 60% think they should be rewarded for monitoring temperature settings on appliances to be more efficient (down 6%).
- 67% think electricity companies should do more to financially reward customers who use appliances less frequently.

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



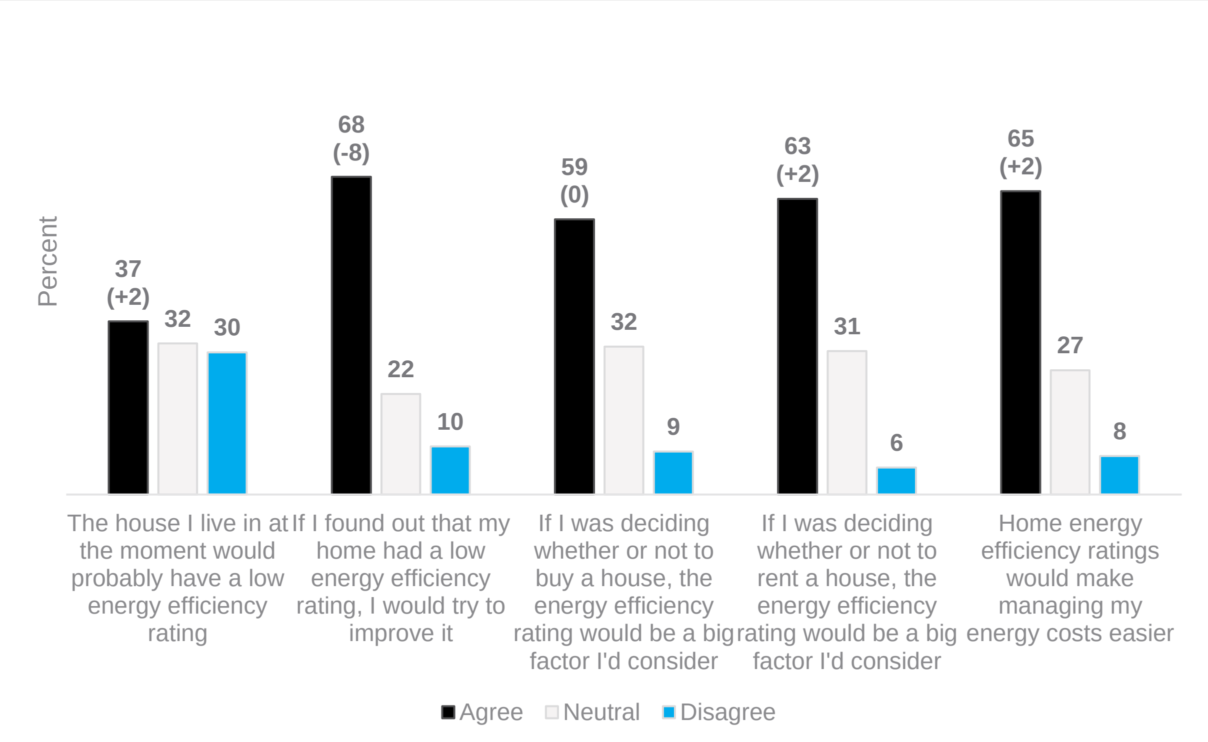
Base: Consumers in QLD (n=315)

Housing energy efficiency

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

- 68% of homeowners say they would try to improve their home's energy rating if they found out it had a low rating (down 8%).
- 30% disagree with the statement that their home would probably have a *low* energy efficiency rating.
- 63% of renters say that an energy efficiency rating would be a big factor they would consider when renting a house.
- 65% say that a home energy efficiency rating would make managing their energy costs easier.

Do you agree or disagree with the following? (%)



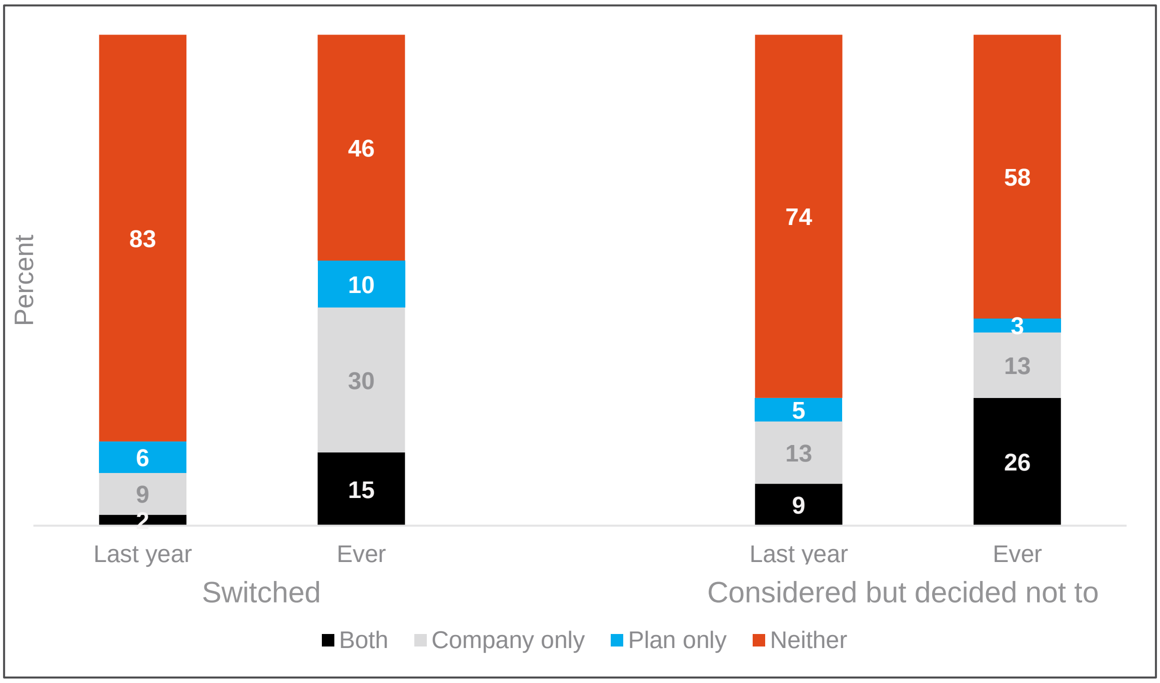
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in QLD (n=315)
Base for 'I would try to improve my home energy efficiency': Home-owners in QLD (n=204)
Base for 'consider energy rating when renting': Renters in QLD (n=104)

Switching behaviour

Most Queensland households stayed with their electricity company last year, and around half have never switched companies or plans.

- Just 17% of all Queensland household consumers report having switched companies or plans in the past year, while 26% say they considered it last year but decided not to at that time.
- 46% say they have never switched companies or plans.

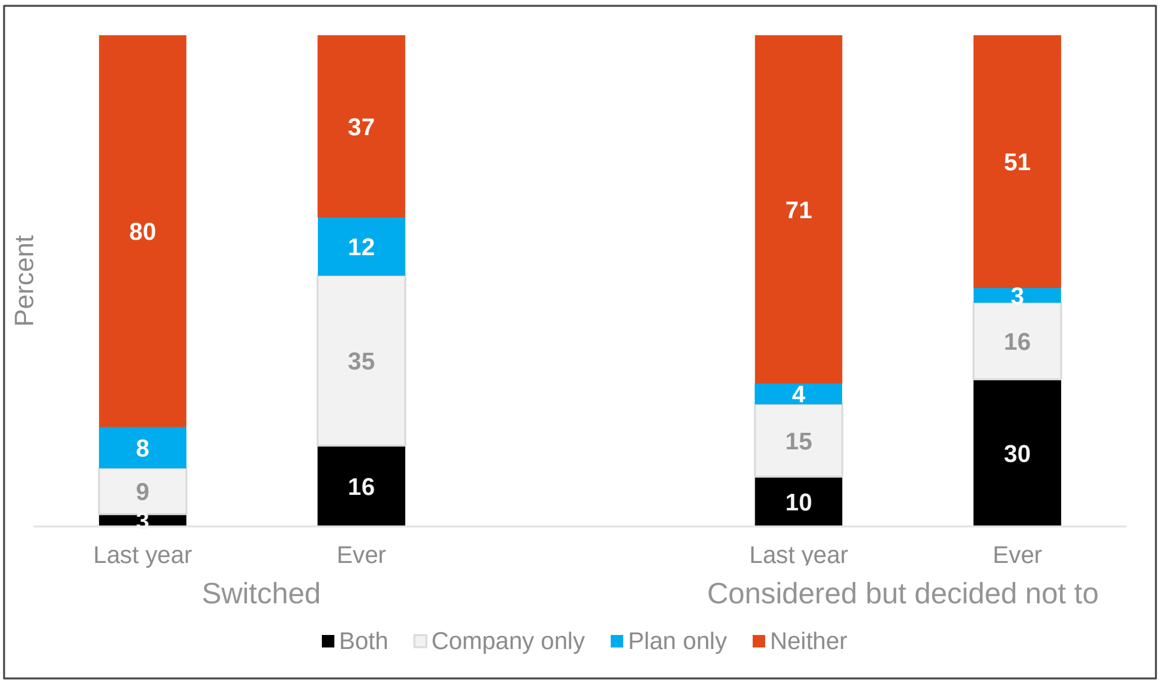
Which of the following have you done? (QLD incl. SEQ data) (%)



Base: Consumers in QLD (n=315)

- In the deregulated part of the state, 20% report having switched in the past year and 37% say they have never switched either plan or company.

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



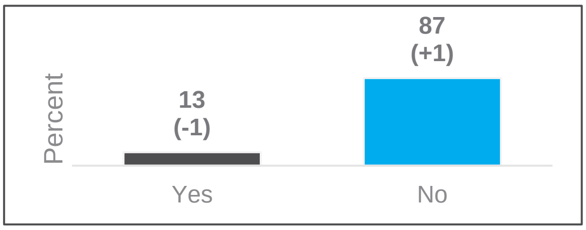
Base: Consumers in SEQ (n=237)

Reasons for considering switching

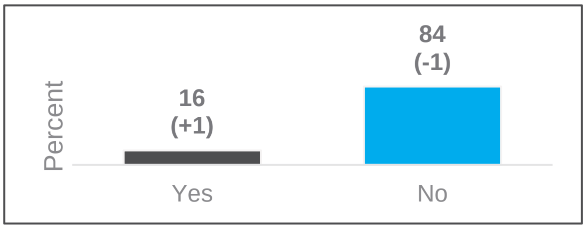
Poor value for money is a major reason for customers to look to switch energy companies.

- 34% of those who have considered switching say they were dissatisfied with their energy company's value for money.
- 13% of all Queensland household consumers (and 16% 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? (%)

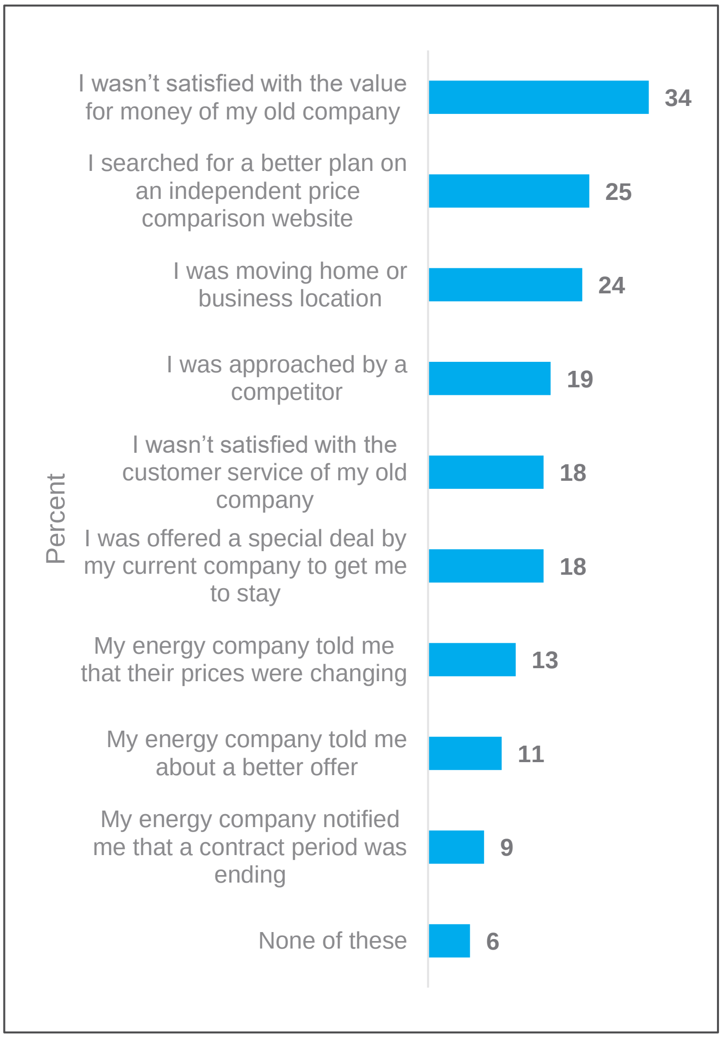


Base: Consumers in QLD (n=315)



Base: SE Consumers in QLD (n=237)

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



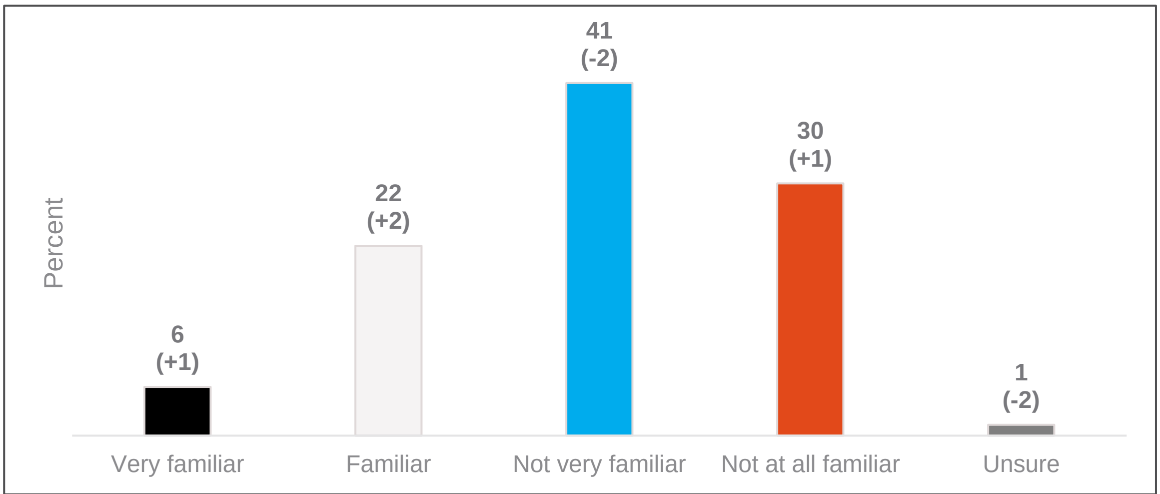
Base: Consumers in QLD who have switched or looked at switching in the past (n=186)

Awareness of the Energy Ombudsman

Awareness of the Energy Ombudsman remains fairly low.

- 41% say they are not that familiar with the Ombudsman and 30% are not at all familiar.
- Of the 28% who are familiar, 6% are very familiar and 22% are familiar.

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

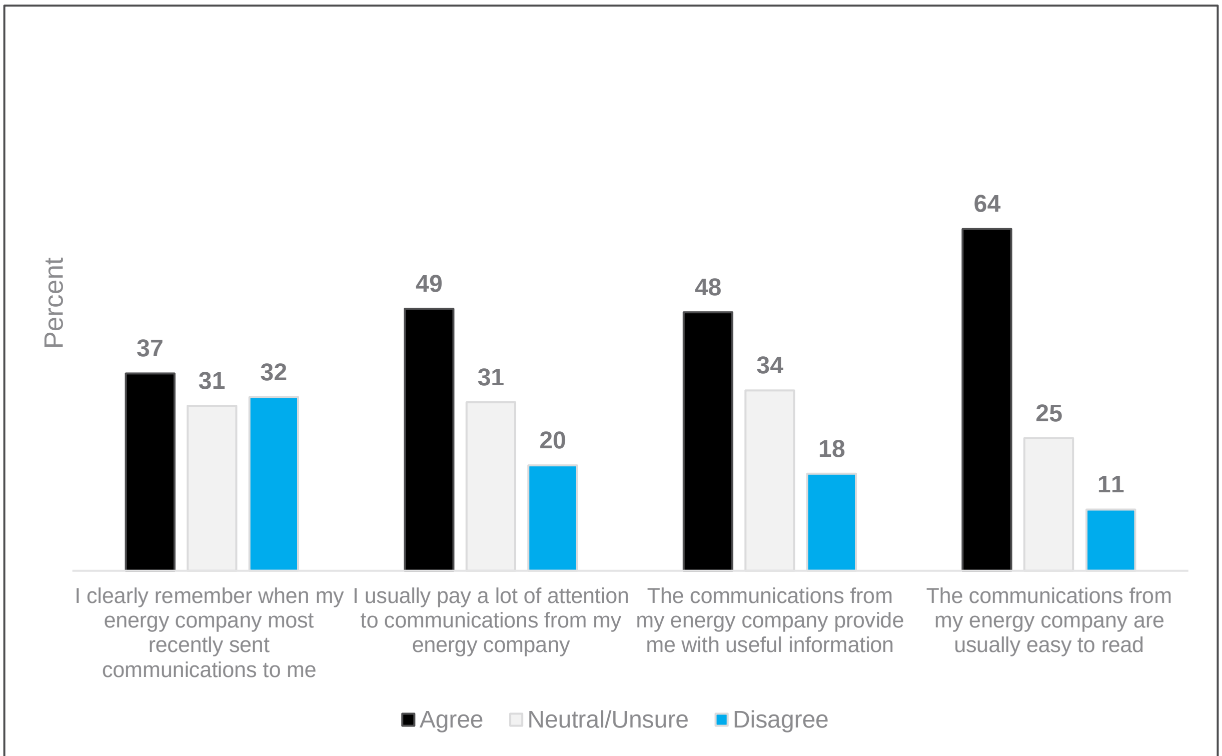


Base: Consumers in QLD (n=315)

Communications from energy providers

Around two-thirds of Queensland household consumers agree that communications they receive from energy companies are easy to read.

- 64% agree that communications from energy companies are easy to read, and around half (48%) agreed that these communications provided useful information.
- Engagement with communications from energy companies is low compared to other states, with 37% of Queensland households agreeing that they clearly remember when the last communication was sent to them and 49% saying they usually pay a lot of attention to the communications.

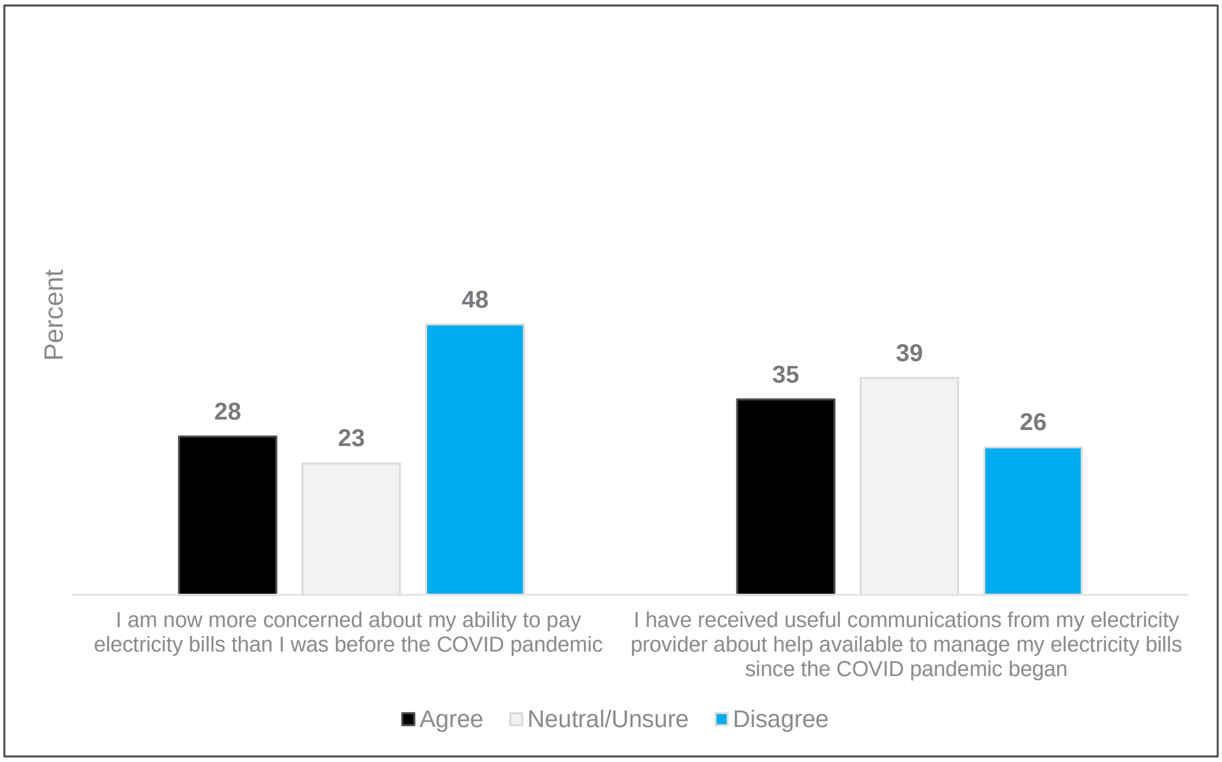


Base: Consumers in QLD (n=315)

Effects of COVID-19

Over a third of Queensland households have received useful communication from their energy companies during the pandemic.

- Just under a third (28%) of Queensland households say they are now more concerned about how to pay electricity bills than before the start of the COVID-19 pandemic. 48% disagree that they are more concerned.



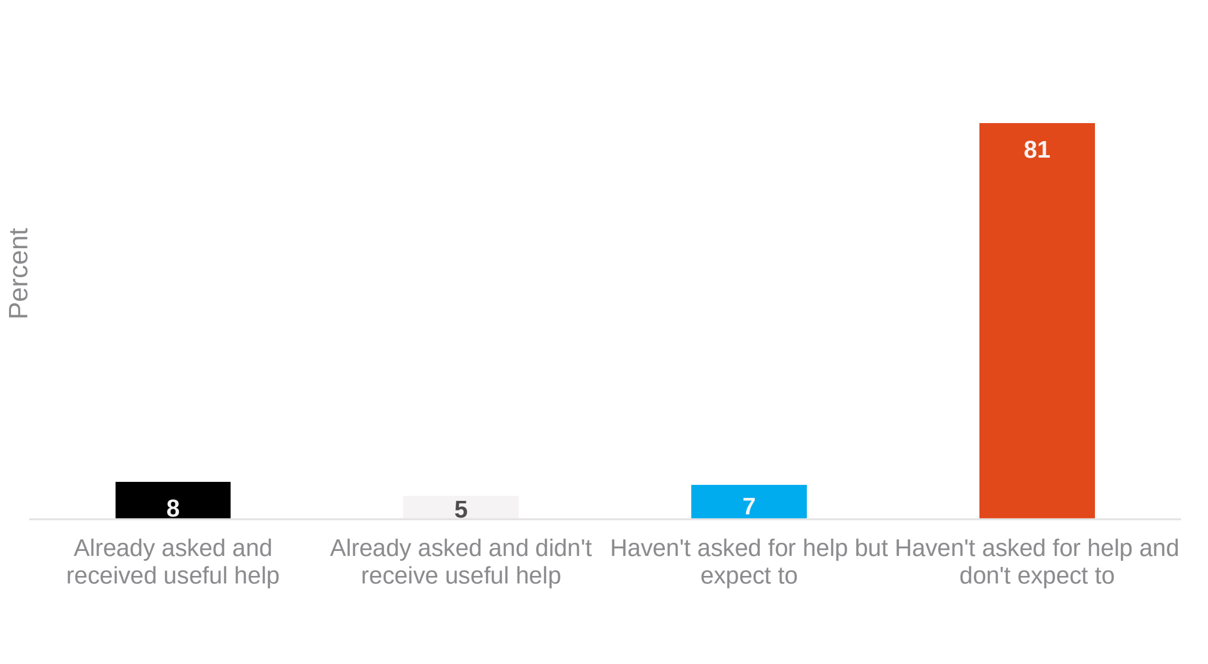
Base: Consumers in QLD (n=315)

Asking for help from electricity provider

Queenslanders are less likely to say they require assistance during the COVID-19 pandemic than other states.

- 81% of Queensland households say they have not asked for help to manage bills and do not expect to do so. This is higher than in New South Wales (70%) or Victoria (74%).
- 12% of households have already asked for help from their electricity provider, with 8% saying the help they received was useful and 5% saying it was not useful.
- 7% of households have not yet required assistance but expect to in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)



Base: Consumers in QLD (n=315)

South Australia

Overall satisfaction

Overall satisfaction has increased among South Australian household consumers.

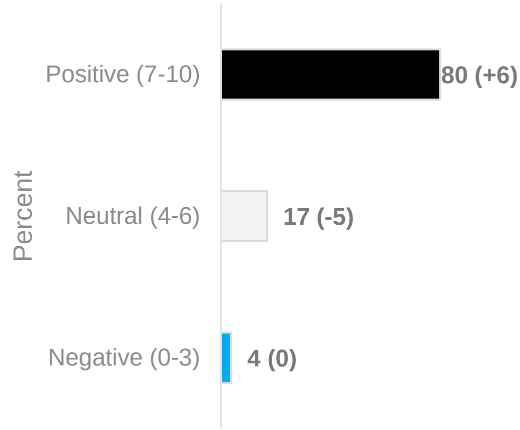
- 80% say they are satisfied (up 6%).

Over half of households are satisfied with the level of competition in the market.

- 57% of South Australian household consumers are satisfied with the level of competition in the energy market.

Overall Satisfaction

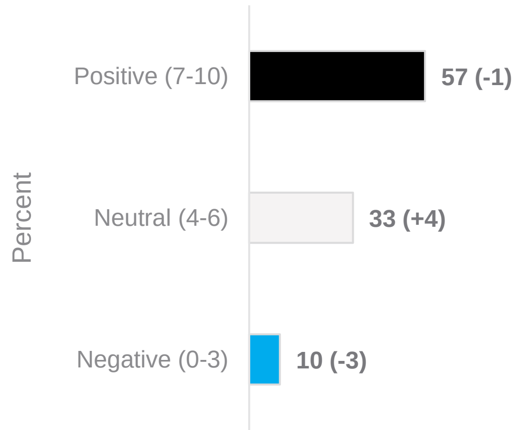
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in SA (n=293)

Satisfaction with competition

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



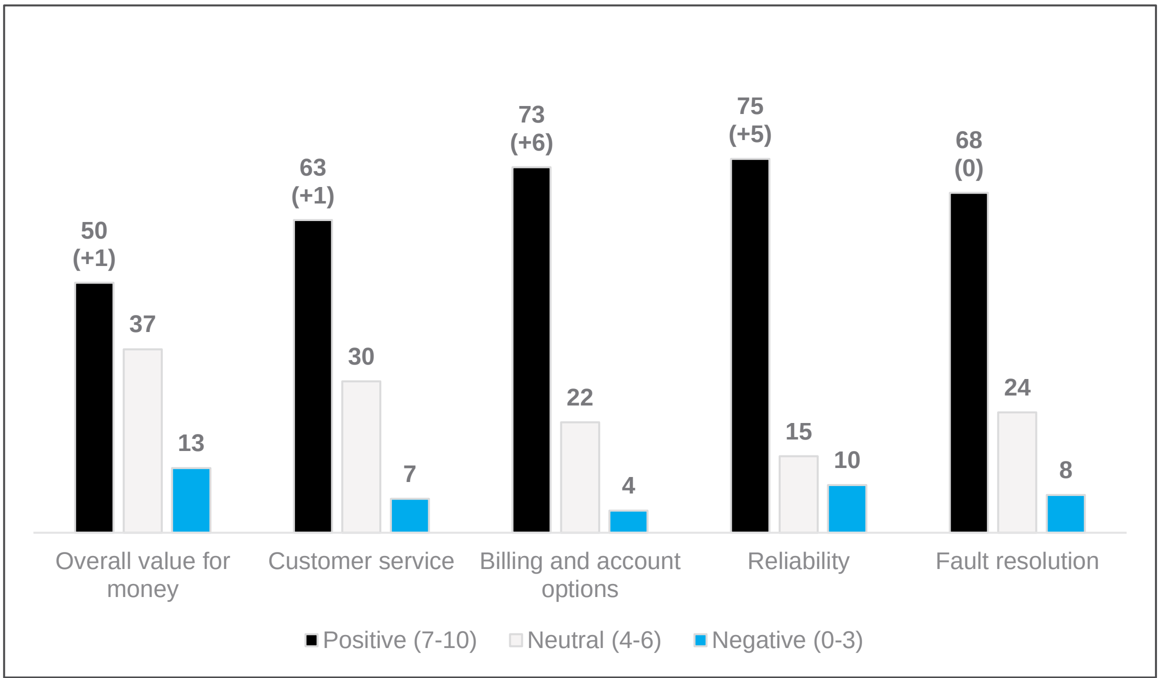
Base: Consumers in SA (n=293)

Satisfaction with electricity

Satisfaction with electricity billing and reliability has increased.

- Satisfaction with reliability increased to 75% (up 5%) while satisfaction with billing and account options increased to 73% (up 6%) over the past year.
- Half of South Australian household consumers are satisfied with the overall value for money of their electricity service (50%).
- 63% are satisfied with the customer service they receive from their energy company.
- Of those who experienced a power outage, 68% are satisfied with the fault resolution.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



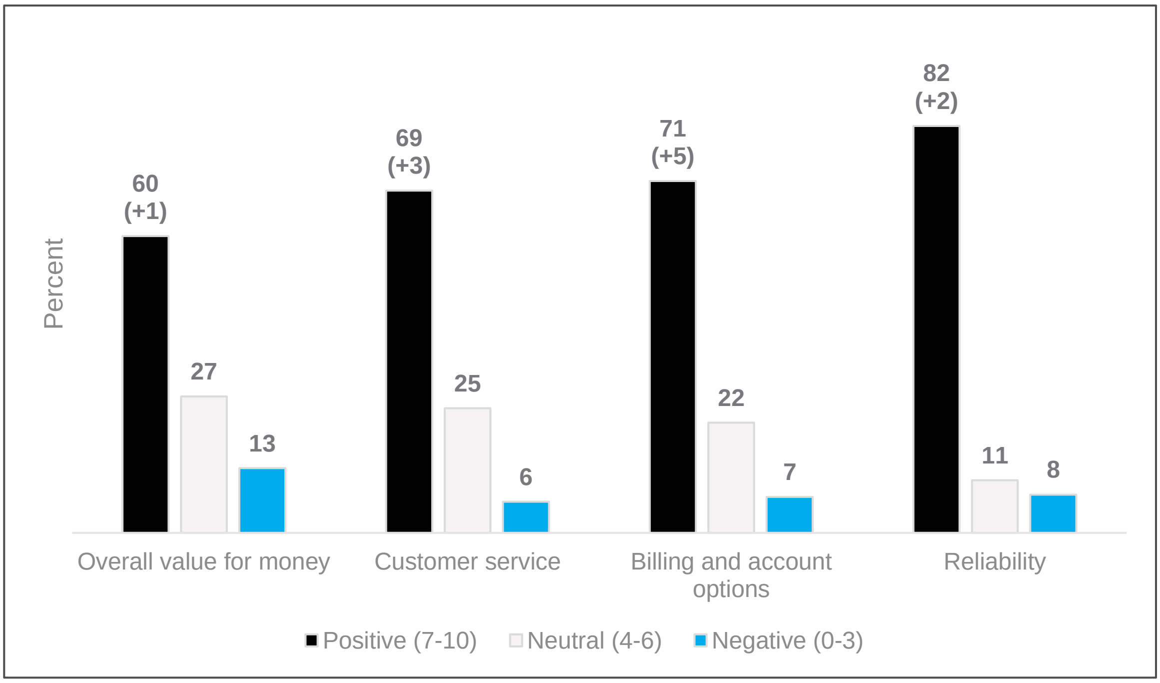
Base: Consumers in SA with electricity supply (n=293)
Base for fault resolution: Those in SA who had a power outage or rated 0 to 9 satisfaction with outage (n=145)

Satisfaction with gas

South Australian households are most satisfied with the reliability of their gas service.

- 82% are satisfied with the reliability of their gas services while 71% are satisfied with their billing and account options (up 5%).
- Just under two-thirds of South Australian household consumers who have gas are satisfied with the overall value for money (60%) and 69% are satisfied with the customer service provided by their gas supplier.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: South Australian gas consumers (n=208)

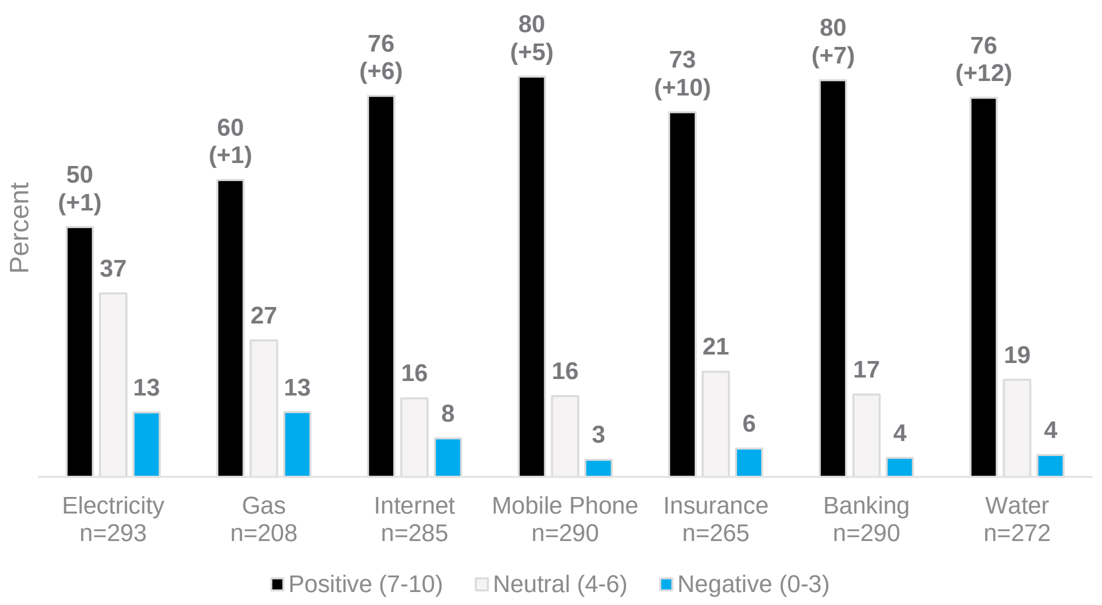
Rating of utilities and services

Ratings for the value for money of energy has not kept pace with improved levels of satisfaction for other services and utilities.

- 50% of consumers rate the overall value for money from their electricity service positively, while value for money of gas comes in at 60%.
- There were stronger improvements value for money ratings of all other utilities and services, particularly water (up 12% to 76%) and insurance (up 10% to 73%).
- Household consumers in South Australia rate their mobile phone service and banking (both 80%) as the highest value for money services they receive.

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'



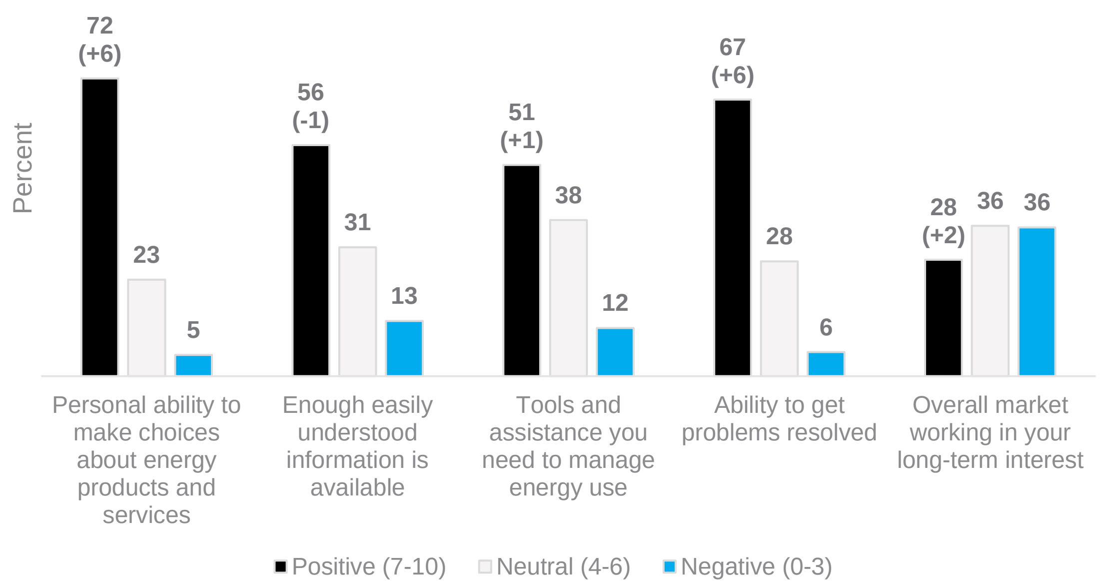
Base: Consumers in SA with these services

Confidence in information, tools and a working market

Few South Australians are confident that the market is working in their long-term interest.

- 28% of household consumers expressed confidence that the market is working in consumers' interests.
- Consumers have greater confidence in their own ability to make choices about energy products and services (72%, up 6%) and resolve issues (67%, up 6%).
- 56% of household consumers are confident that the information available to them is easy to understand and 51% are confident of getting the tools and assistance they need to manage their energy use.

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in SA (n=293)

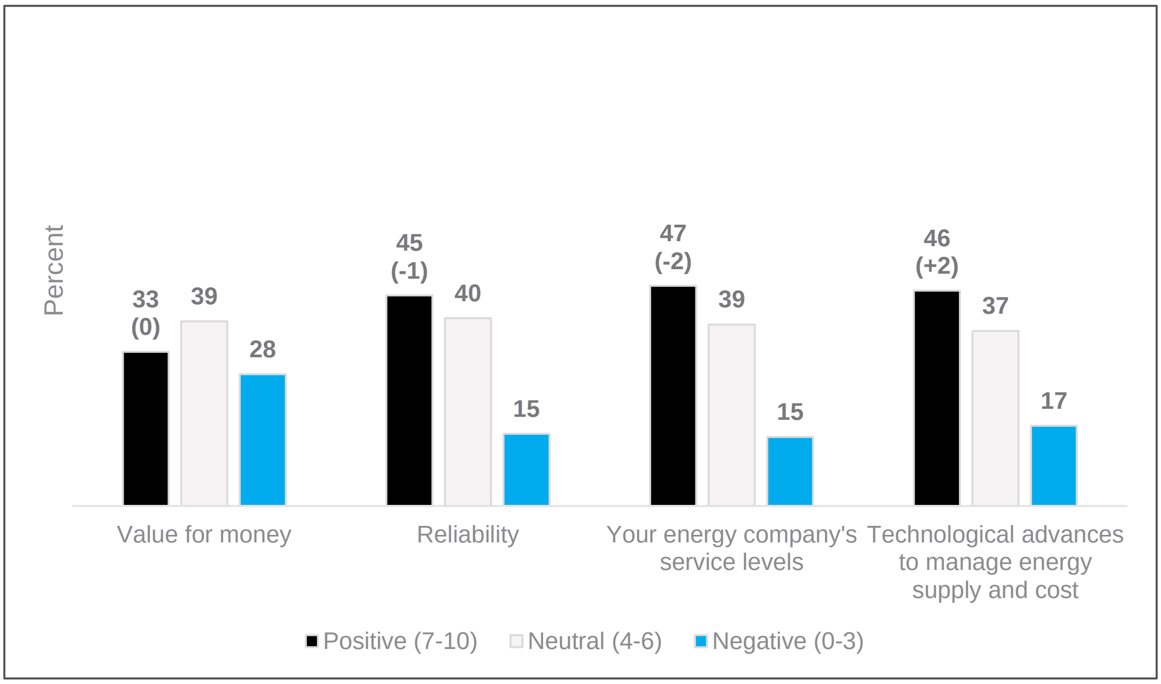
Confidence in long term outcomes

South Australian household consumers have low levels of confidence that the energy market will provide better outcomes in the future.

- A third of consumers are confident the market will deliver better overall value for money in the future.
- Less than half of all households are confident the market will provide better outcomes in relation to technological advances to manage energy supply and cost (46%), service levels (47%) and reliability (45%).

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'



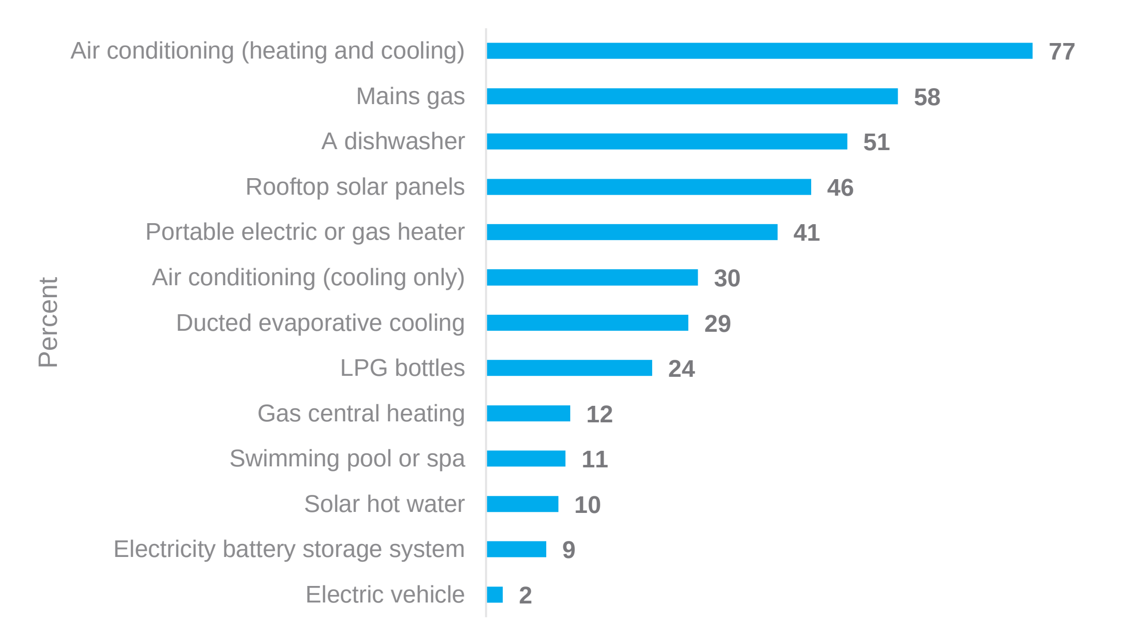
Base: Consumers in SA (n=293)

Uptake of technologies

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

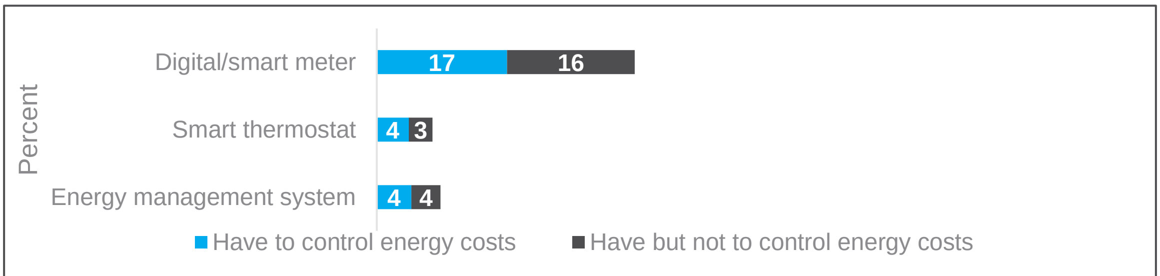
- 46% of households in South Australia report having rooftop solar and 77% say they have air conditioning that they use for heating and cooling.
- 33% say they have a smart/digital meter, and the proportion of total households who say they use a digital/smart meter to manage their energy use is 17%.

Which of the following do you have at your home? (%)



Base: Consumers in SA (n=293)

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



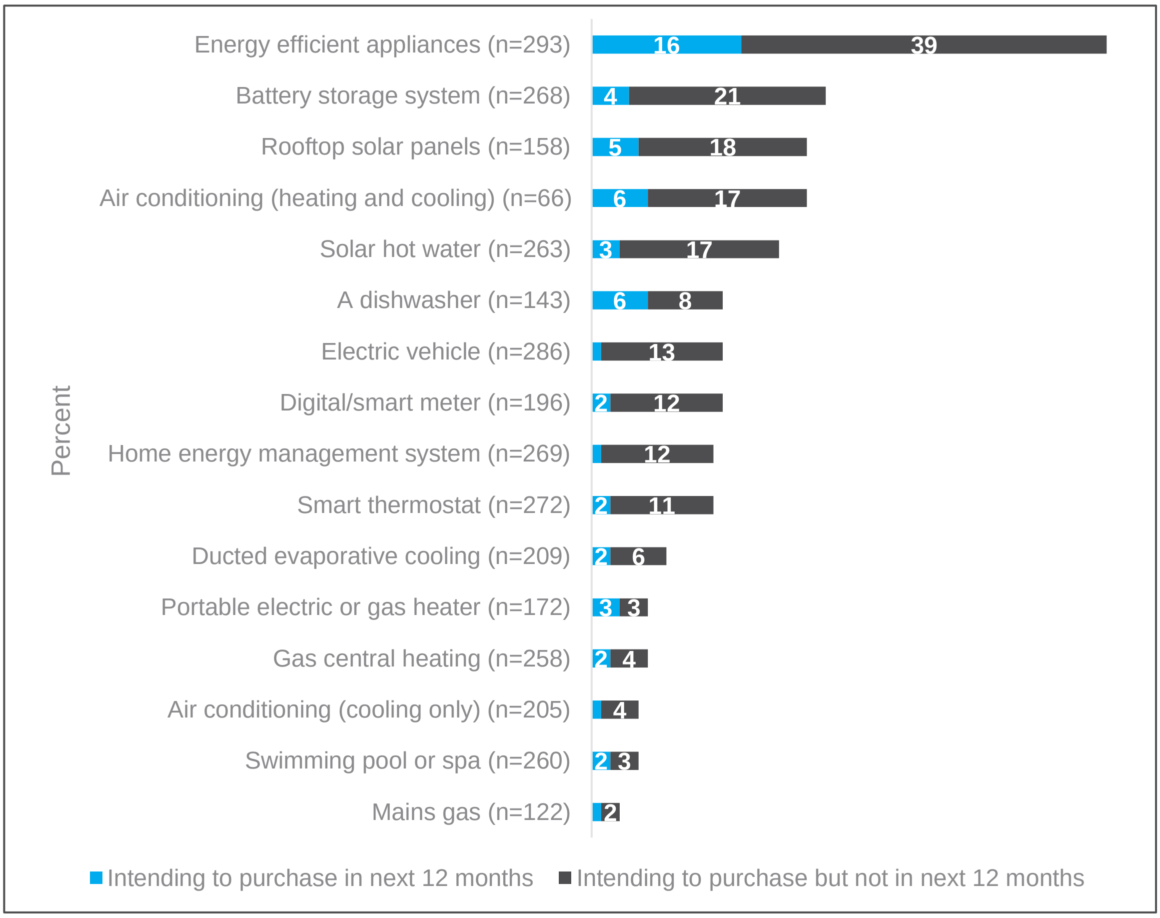
Base: Consumers in SA (n=293)

Future uptake of technologies

Interest in energy technology has fallen in South Australia.

- 23% of household consumers say they are considering buying rooftop solar panels (down 17%) and 25% are considering a battery storage system (down 8%).
- Of those households who report having solar panels, 38% expressed interest in adding a battery storage system (down 7%).

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

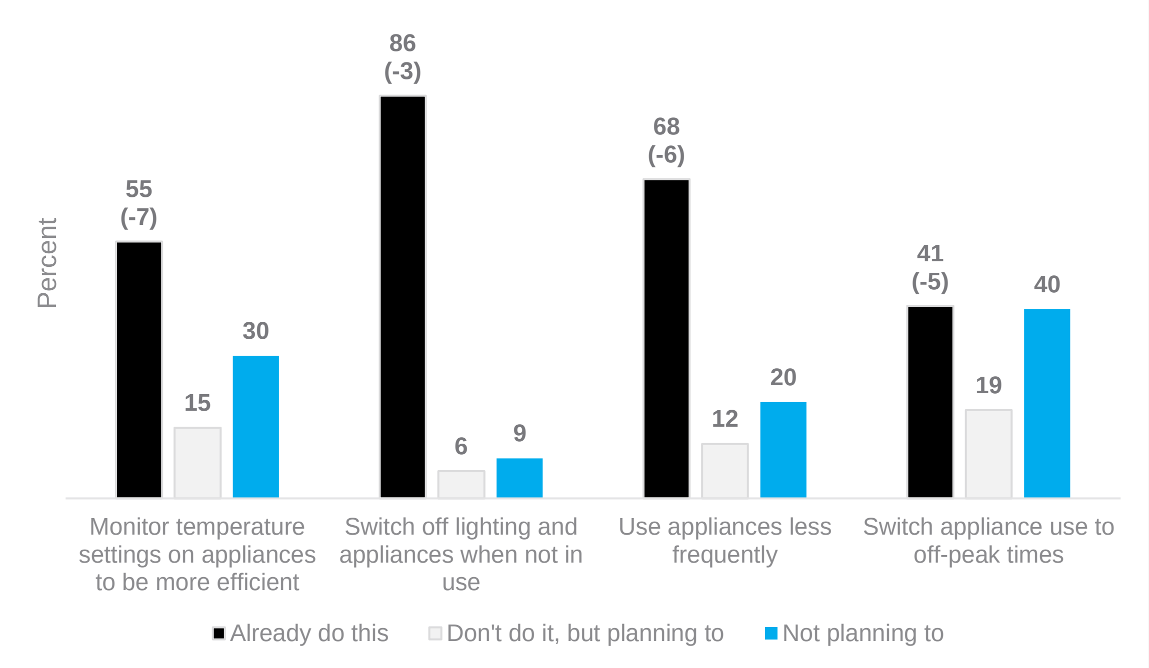
Note: For readability, percentages have been omitted where they are less than 2%

Energy saving practices

Compared to last year, South Australian household consumers are less likely to report actively managing their energy use.

- 55% say they monitor temperature settings on their appliances (down 7%) and 68% use appliances less frequently (down 6%).
- 41% say they have already switched appliance use to off-peak times (down 5%).
- 86% say they already switch off lighting and appliances when not in use.

Which of the following do you do or plan to do? (%)



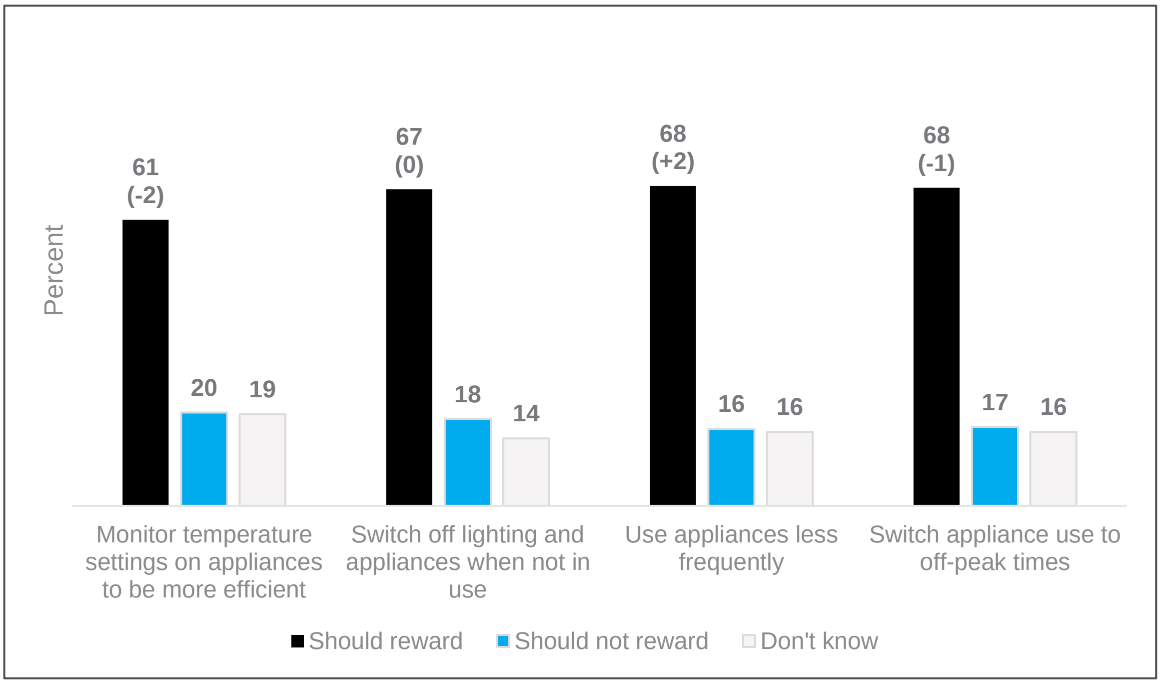
Base: Consumers in SA (n=293)

Reward for reducing energy use

Support for rewarding energy efficient behaviour is strong and steady in South Australia.

- 68% of household consumers think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 67% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use.
- 68% think electricity companies should do more to financially reward customers who use appliances less frequently.
- 61% think electricity companies should do more to financially reward customers who monitor temperature settings on appliances to be more efficient.

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



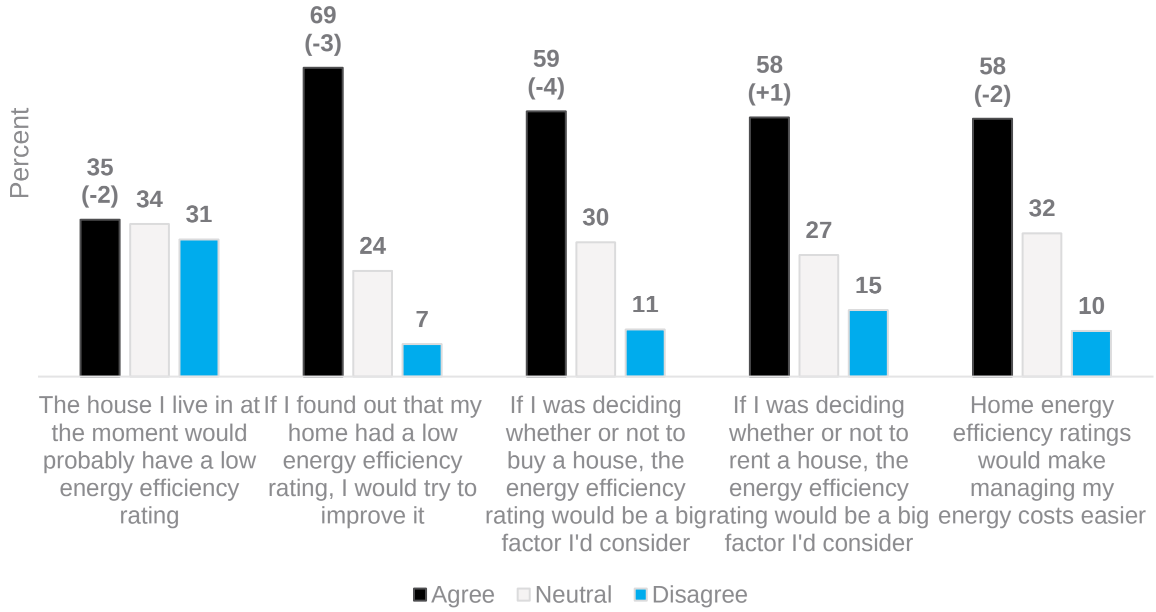
Base: Consumers in SA (n=293)

Housing energy efficiency

Most consumers in South Australia would make upgrades to their house if they found out that it had a low energy efficiency rating.

- 69% of homeowners say 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 and 58% said a home energy efficiency rating would make managing their energy costs easier.
- 58% of renters said an energy efficiency rating would be a big factor they would consider when renting a house.

Do you agree or disagree with the following? (%)



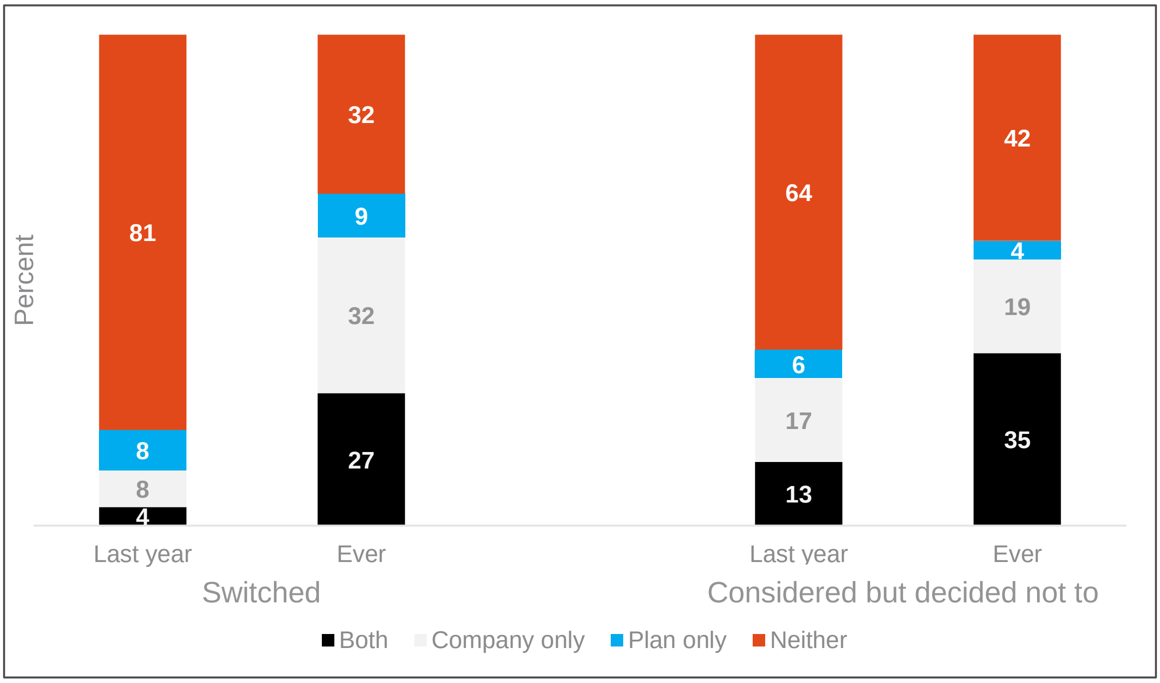
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in SA (n=293)
Base for 'I would try to improve my home energy efficiency': Home-owners in SA (n=207)
Base for 'consider energy rating when renting': Renters in SA (n=81)

Switching behaviour

One in five South Australians say they have switched energy company and/or plan in the past twelve months.

- 20% report switching in the past year, which is lower than the 31% who switched in the previous year.
- 36% say they considered switching in the past year but decided not to.
- 32% of South Australian household consumers have never switched energy companies or plans.

Which of the following have you done? (%)



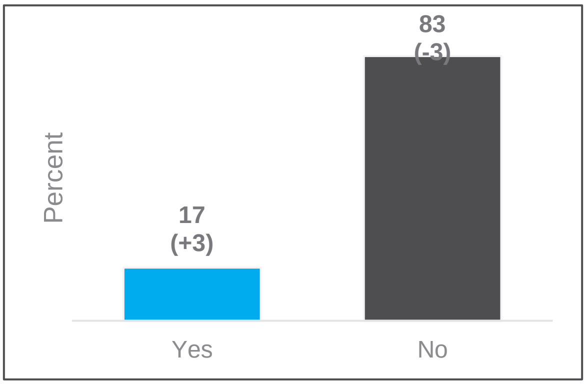
Base: Consumers in SA (n=293)

Reasons for considering switching

Dissatisfaction with the value for money of their electricity service is the most common reason for South Australians to look at switching.

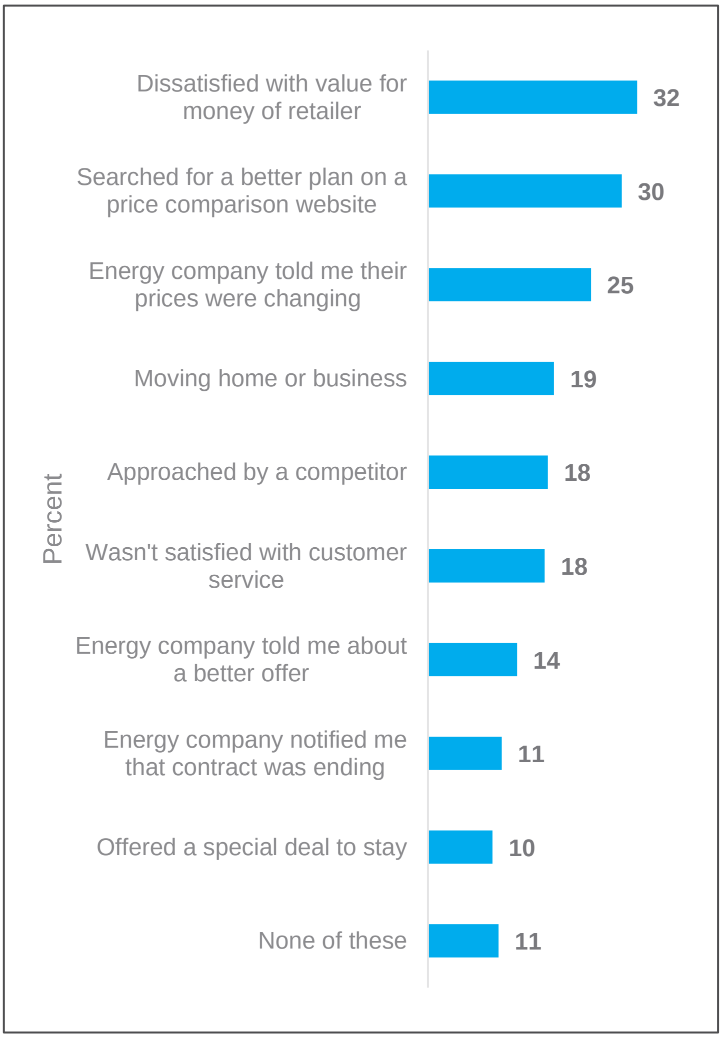
- 32% of those who switched companies say they were not satisfied with the value for money of the service provided by their supplier.
- 30% say they looked at a price comparison website the last time they considered switching.
- 17% plan to switch energy companies or plans in the next year.

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



Base: Consumers in SA (n=293)

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



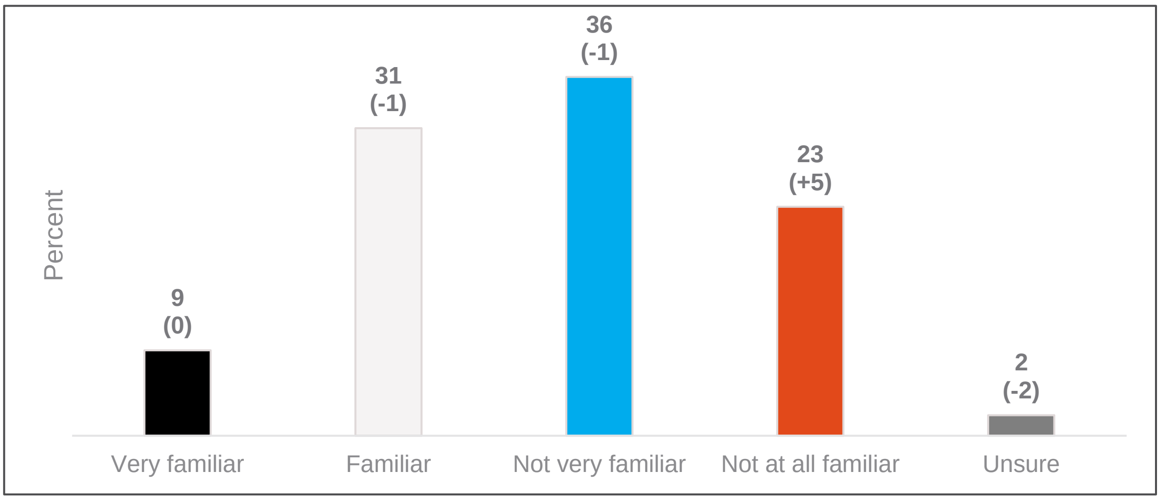
Base: Consumers in SA who have switched or looked at switching in the past (n=212)

Awareness of the Energy Ombudsman

40% say they are very familiar or familiar with the Energy Ombudsman.

- 9% are very familiar with the Energy Ombudsman and 31% are familiar.

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



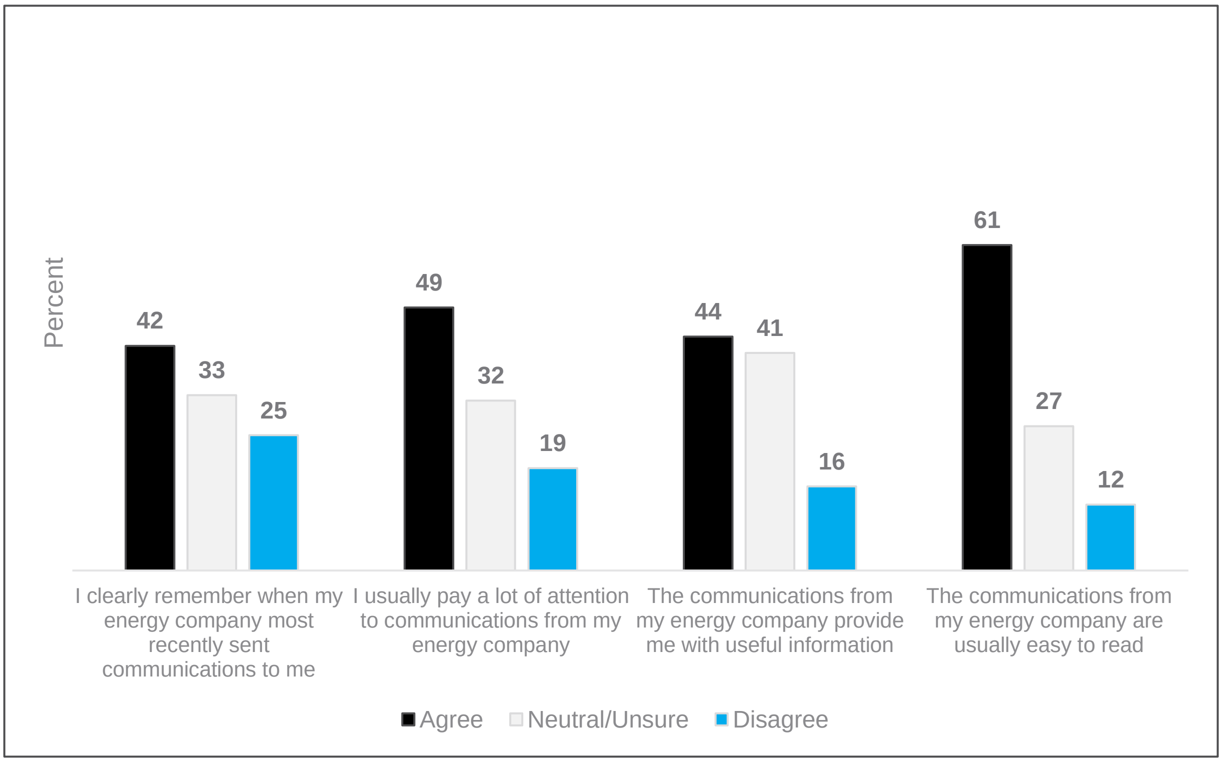
Base: Consumers in SA (n=293)

Communications from energy providers

Less than two-thirds of South Australian household consumers agree that the communications they receive from their energy providers are easy to read.

- 61% of South Australian consumers agree that communications from their energy company are easy to read and only 44% agree that the communications from their energy company provide useful information.
- 49% agree they usually pay a lot of attention to communications from their energy company, but fewer (42%) agree that they clearly remember when they most recently received communication from their energy company.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)

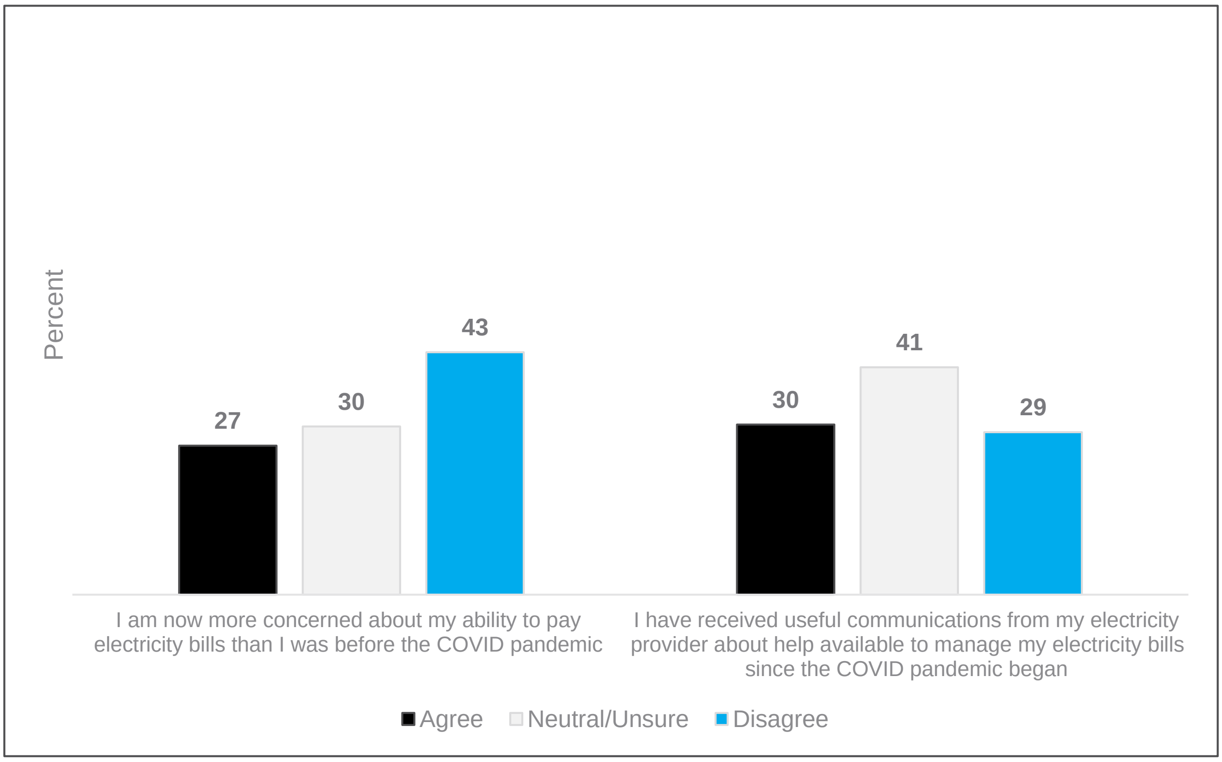


Base: Consumers in SA (n=293)

Effects of COVID-19

- **27% of households agree they are now more concerned about how to pay electricity bills than before the start of the COVID-19 pandemic.** Only 30% agree they have received useful communications from their electricity provider during the pandemic.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



Base: Consumers in SA (n=293)

Asking for help from electricity provider

77% of South Australian households have not and do not expect to ask for help to manage their electricity bills.

- Of the 10% of households who have already asked for help from their electricity provider, just over half received useful assistance.
- 12% of households have not yet required assistance but expect to in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)

Base: Consumers in SA (n=293)

Tasmania

Overall satisfaction

Overall satisfaction with energy services is steady among Tasmanian household consumers.

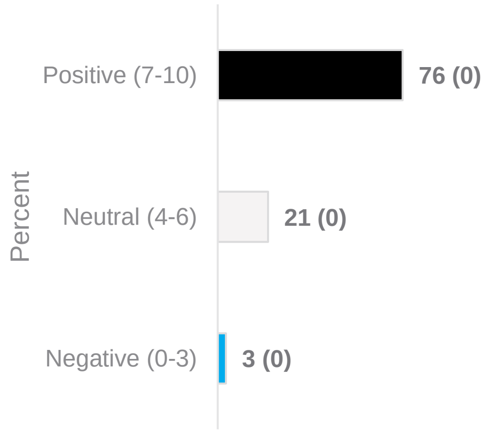
- 76% say they are satisfied with the provision of electricity and gas services.

There is low satisfaction with the competition in the Tasmanian market, but there are signs of improvement.

- 26% say they are satisfied but the proportion of consumers expressing low levels of satisfaction has fallen by 5% in the past year.

Overall Satisfaction

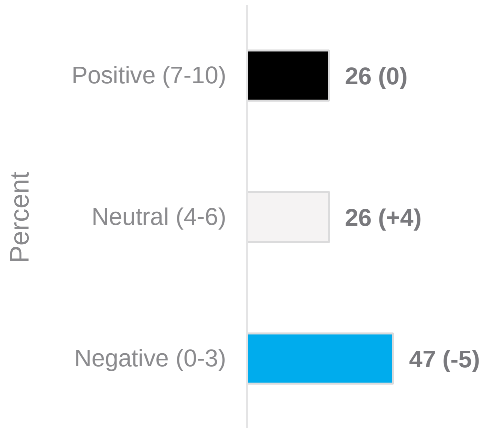
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in TAS (n=208)

Satisfaction with competition

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



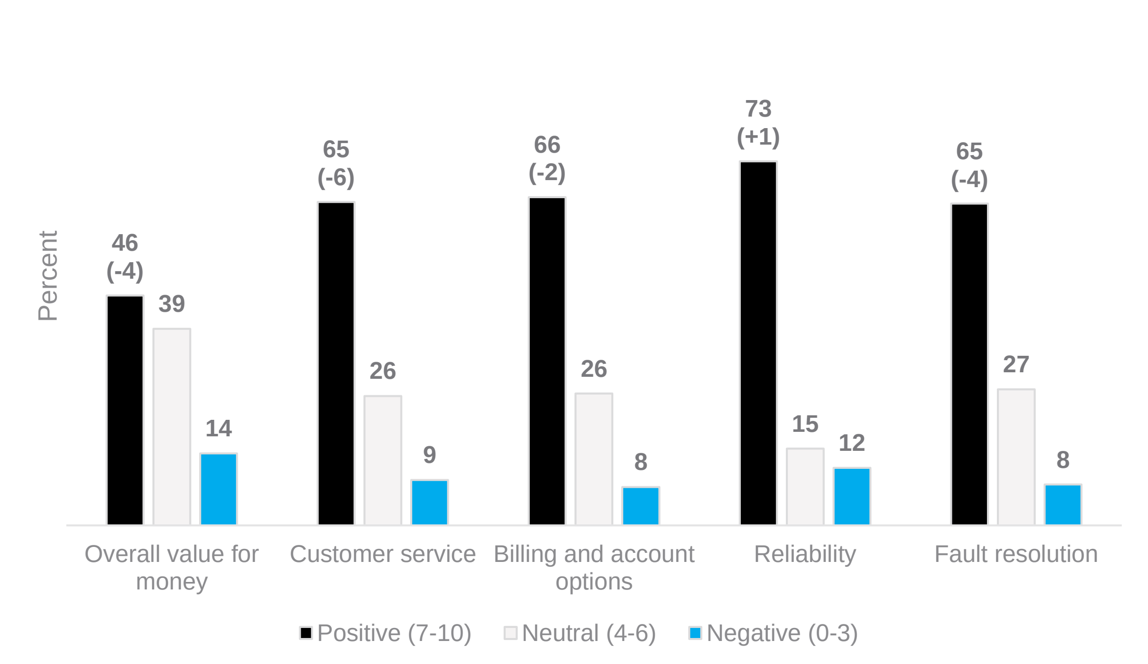
Base: Consumers in TAS (n=208)

Satisfaction with electricity

Tasmanian household consumers' level of satisfaction with their electricity company has not improved, with households feeling particularly less satisfied with the value for money compared to other aspects of the service.

- Satisfaction with overall value for money of electricity services is at 46%, lagging well behind other measures.
- Satisfaction with reliability is strong at 73%.
- Satisfaction with customer service is now at 65% (down 6%) and satisfaction with the available billing and account options is 66%.
- Of those who experienced a power outage, 65% were satisfied with the fault resolution.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



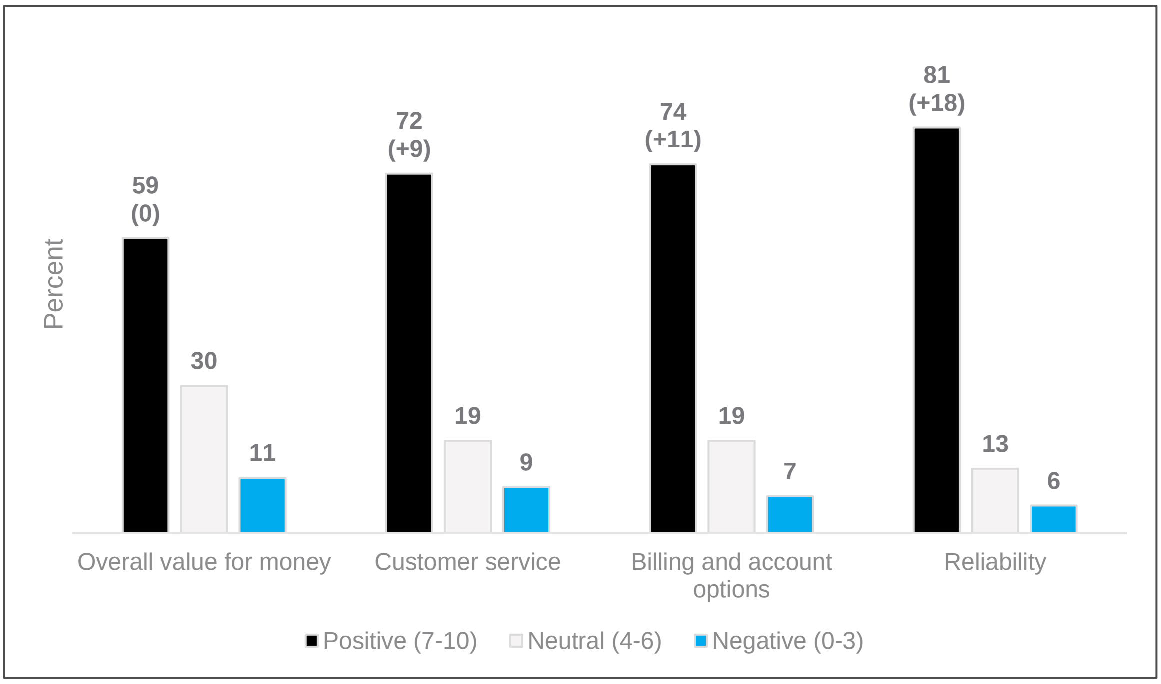
Base: Consumers in TAS with electricity supply (n=208)
Base for fault resolution: Those in TAS who had a power outage or rated 0 to 9 satisfaction with outage (n=110)

Satisfaction with gas

Tasmanian household consumers are more satisfied with most aspects of their gas service, apart from overall value for money.

- 81% are satisfied with the reliability of their gas services (up 18%).
- 74% are satisfied with the available billing and account options (up 11%).
- 72% are satisfied with the customer service provided by their energy company (up 9%).
- 59% are satisfied with the overall value for money of their gas service.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



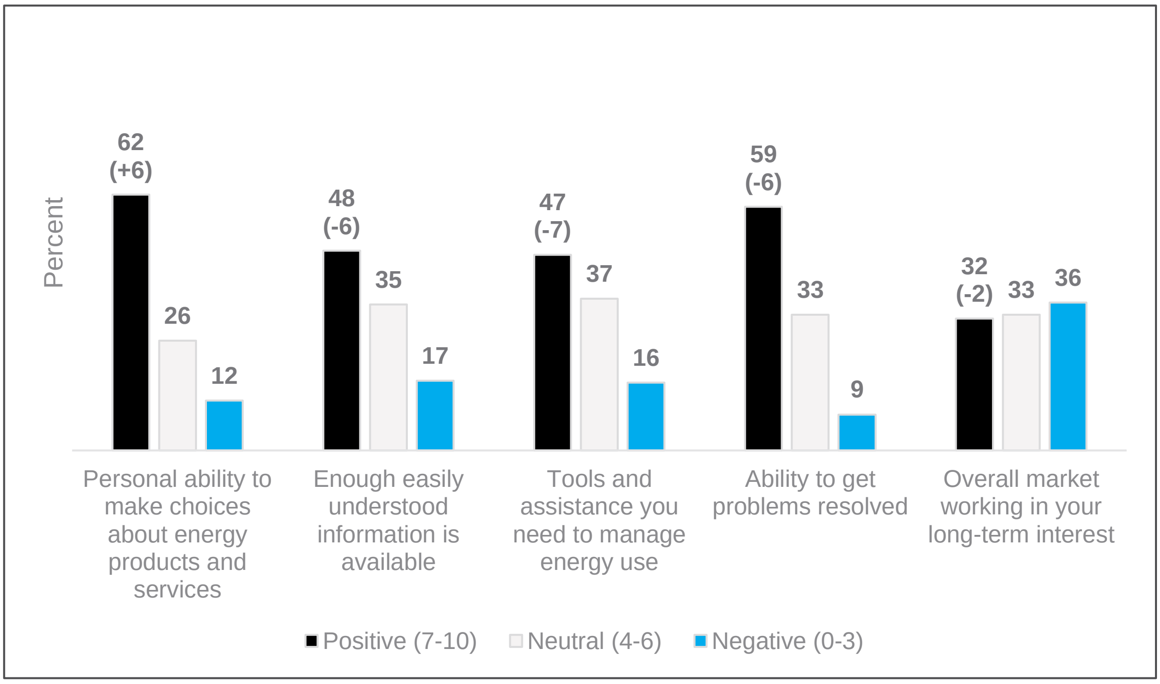
Base: Consumers in TAS with gas supply (n=54)
Note: Small sample size – results are indicative only

Confidence in information, tools and working market

The majority of Tasmanian households are confident in their personal ability to make choices about energy products and services and get problems resolved.

- Household consumers' confidence in their ability to make choices about energy products and services increased to 62% (up 6%).
- Over half are confident they can get problems resolved (59%), but this has decreased 6% in the past year.
- Less than half of household consumers are confident that there is enough easily understood information and tools to manage energy use – down to 48% and 47% respectively.
- A third of Tasmanian households are confident that the market is working in their long-term interest (32%).

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in TAS (n=208)

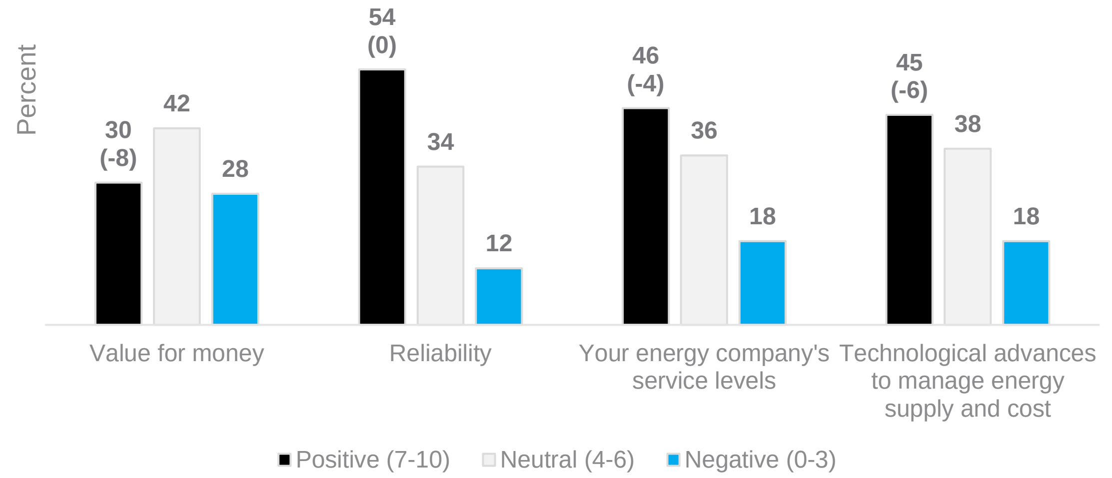
Confidence in long term outcomes

Confidence the market will provide better value for money in the future has dropped and continues to lag behind other measures.

- Less than one-third of Tasmanian household consumers are confident that the market will deliver better value for money in the future (down 8% to 30%).
- Less than half of household consumers are confident that the market will deliver technological advances to manage energy supply and cost (down 6% to 45%).
- 54% are confident that the market will deliver greater reliability and 46% are confident in future service levels.

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'



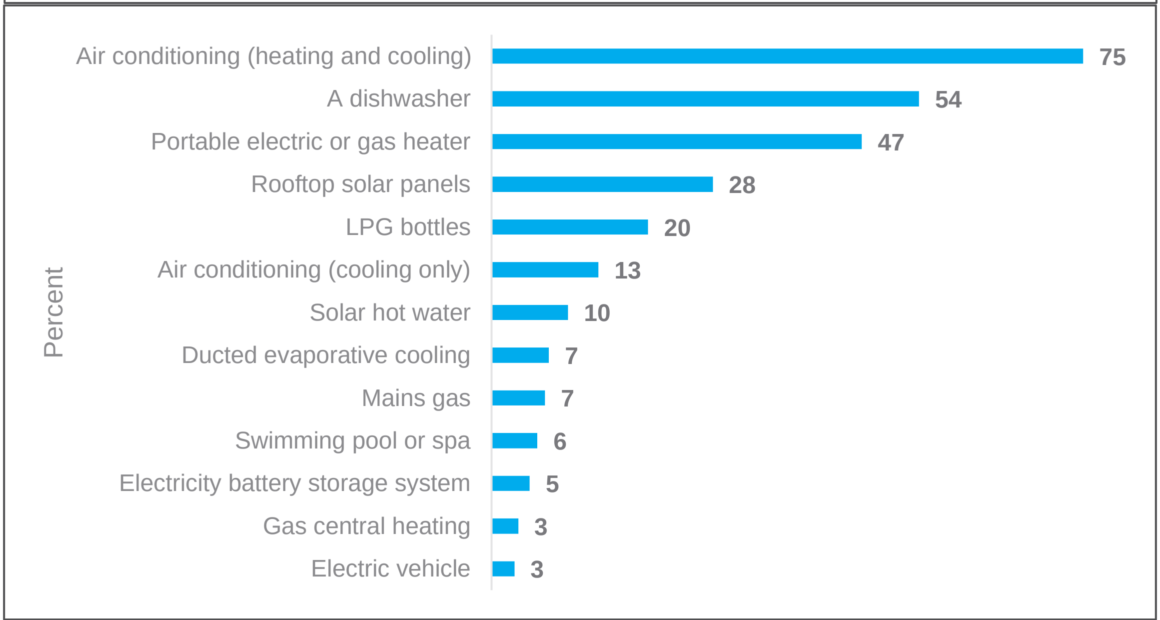
Base: Consumers in TAS (n=208)

Uptake of technologies

Ownership of rooftop solar panels among Tasmanian households has increased in the past 12 months.

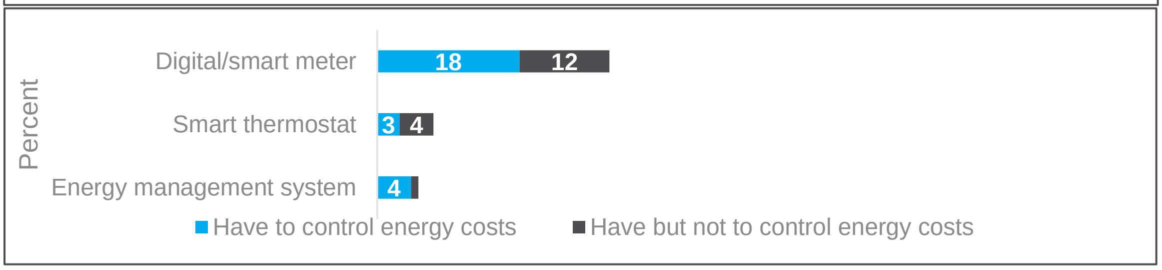
- 28% of households now say they have rooftop solar panels, up 9% from last year.
- Airconditioning for heating and cooling is the most common appliance in Tasmanian households (75%).
- 30% have a smart/digital meter (up 5%) and over half of these (18%) use it to control their energy use and costs.

Which of the following do you have at your home? (%)



Base: Consumers in TAS (n=208)

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 TAS (n=208)

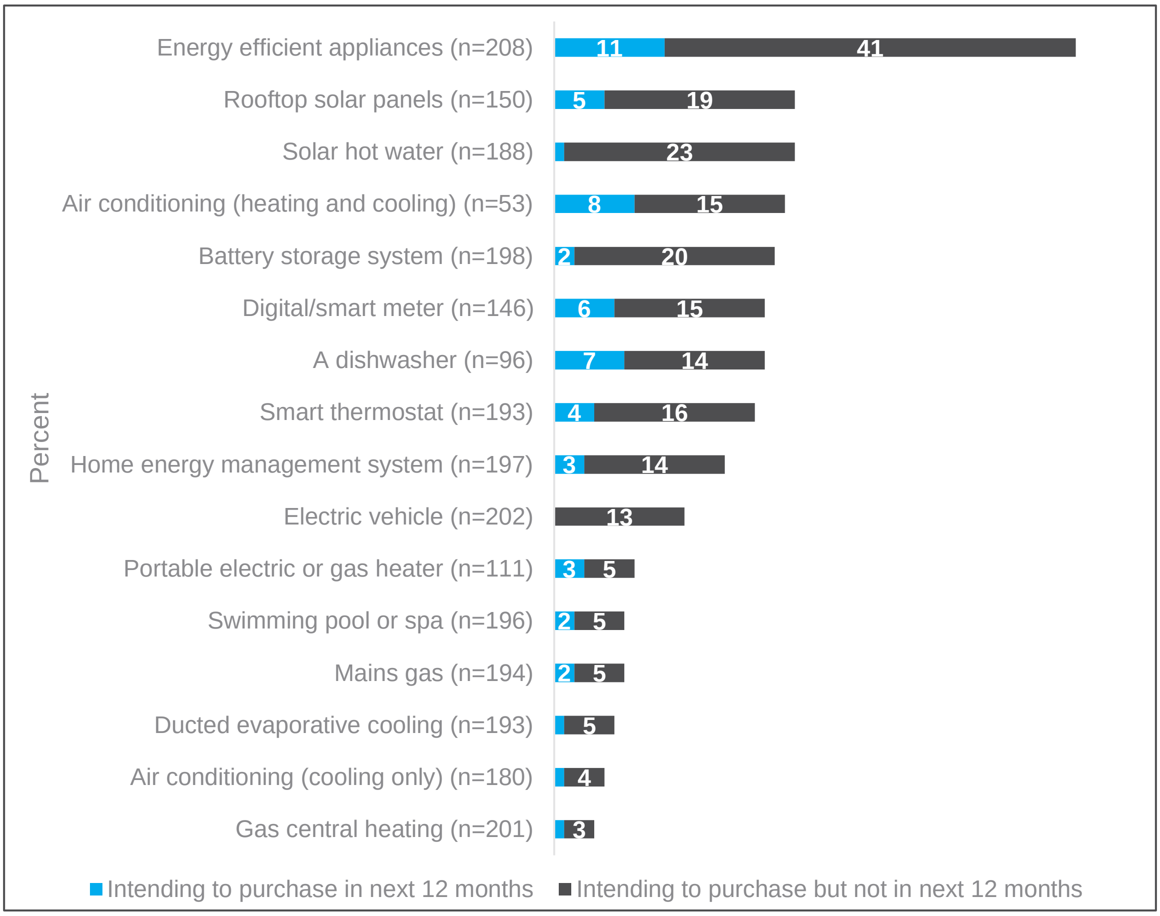
Note: For readability, percentages have been omitted where they are less than 2%

Future uptake of technologies

Interest in buying rooftop solar panels has decreased.

- 5% say they intend to install rooftop solar in the year ahead and 19% say they are considering it beyond that time period. The total of 24% considering solar panels is down 5% from last year.
- Interest is highest in energy efficient appliances with 11% intending to purchase in the next 12 months and a further 41% considering for later in the future.
- Of those households who reported having solar panels, 45% express interest in adding a battery storage system (down 5%).

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.

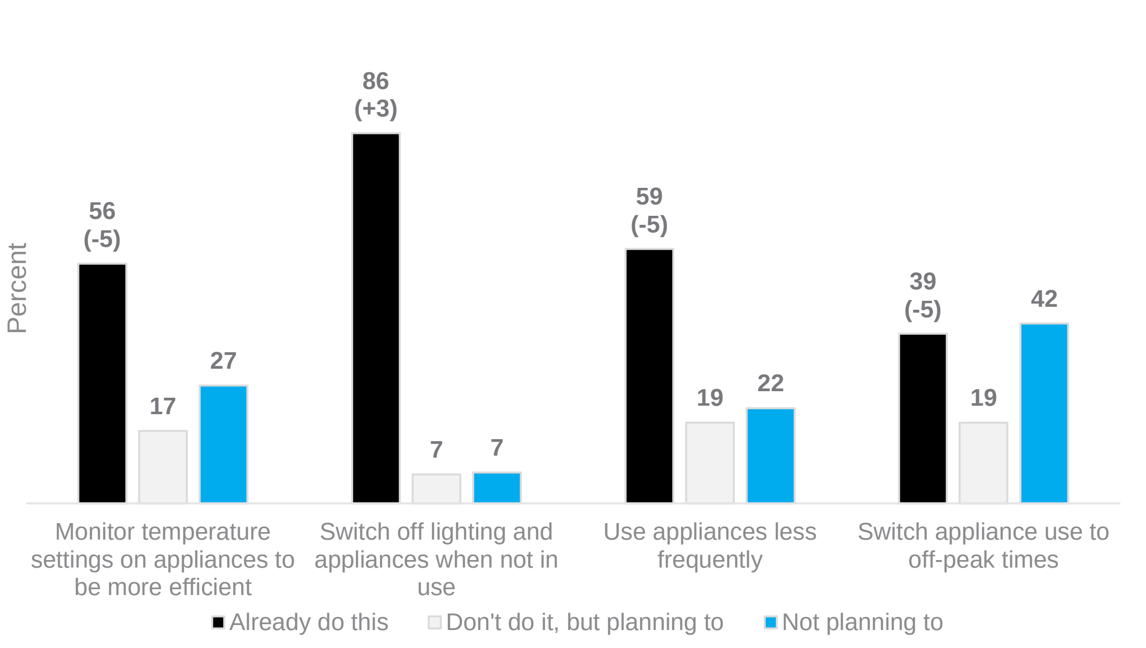
Note: For readability, percentages have been omitted where they are less than 2%

Energy saving practices

Fewer Tasmanian households have engaged in energy efficient behaviour.

- 59% use appliances less frequently (down 5%) and 56% monitor the temperature settings on appliances (down 5%).
- Only 39% of households reported switching their appliance use to off-peak times (down 5%).
- Switching off lighting and appliances when not in use is still the most popular energy saving behaviour (86%).

Which of the following do you do or plan to do? (%)



Base: Consumers in TAS (n=208)

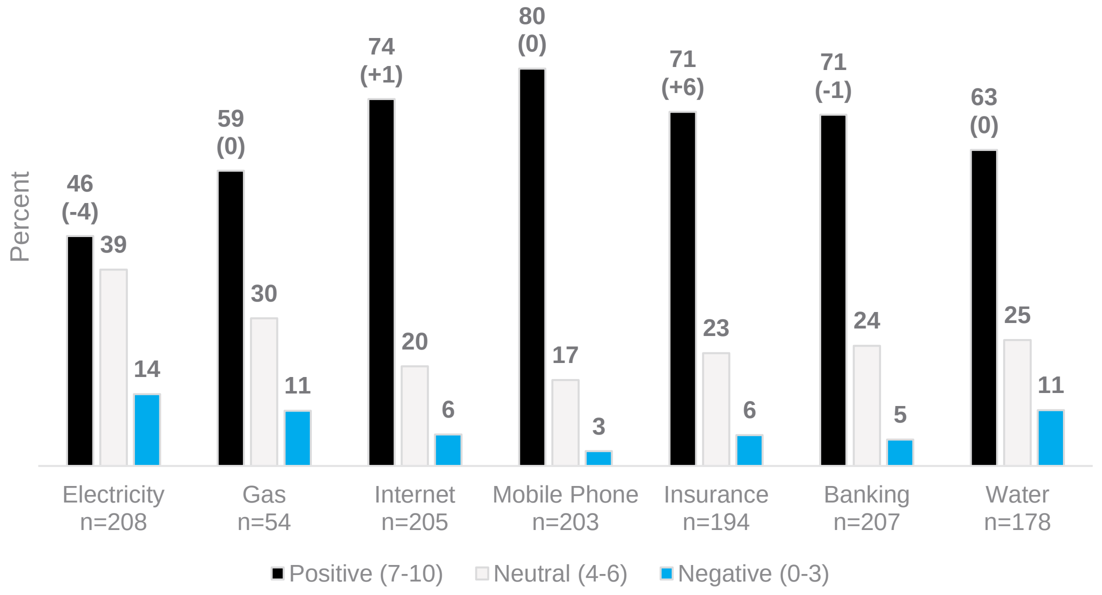
Rating of utilities and services

Ratings for the value for money of electricity and gas services trail all comparable utilities and services.

- Less than half of Tasmanian household consumers ratethe value for money of their electricity services positively (46%), while 59% give positive ratings for the value for money of gas.
- Value for money ratings are highest for mobile phone and internet services (80% and 74% respectively).

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'



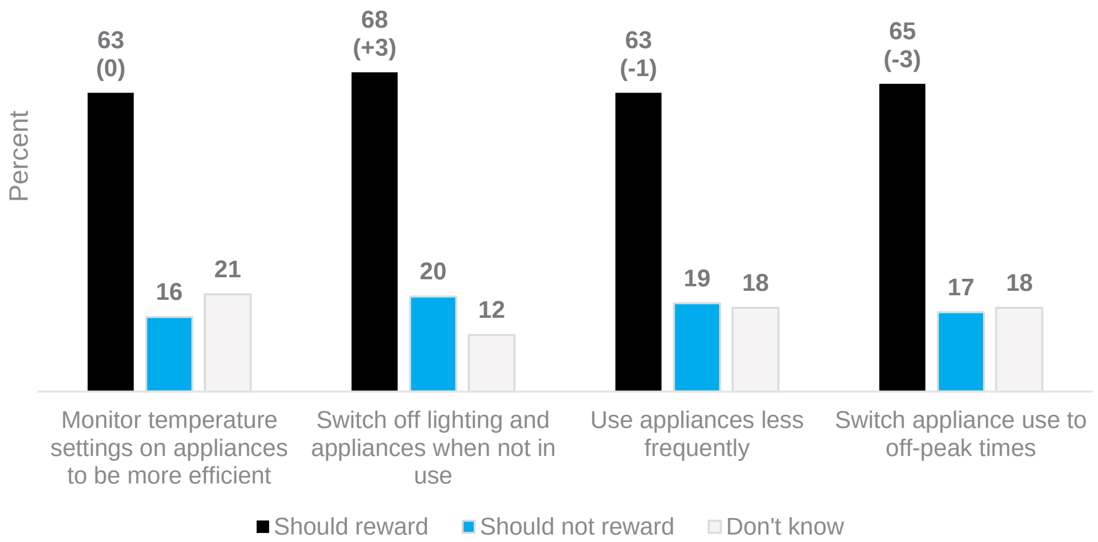
Base: Consumers in TAS with these services
Note: Small gas sample size – results are indicative only

Reward for reducing energy use

Most Tasmanians support the idea of customers being rewarded for taking action to reduce their energy usage.

- 65% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 63% express support for rewarding customers who use appliances less frequently.
- 68% express support for rewarding customers who switch off lighting and appliances when not in use.
- 63% support rewarding customers who monitor temperature setting on appliances to be more efficient.

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



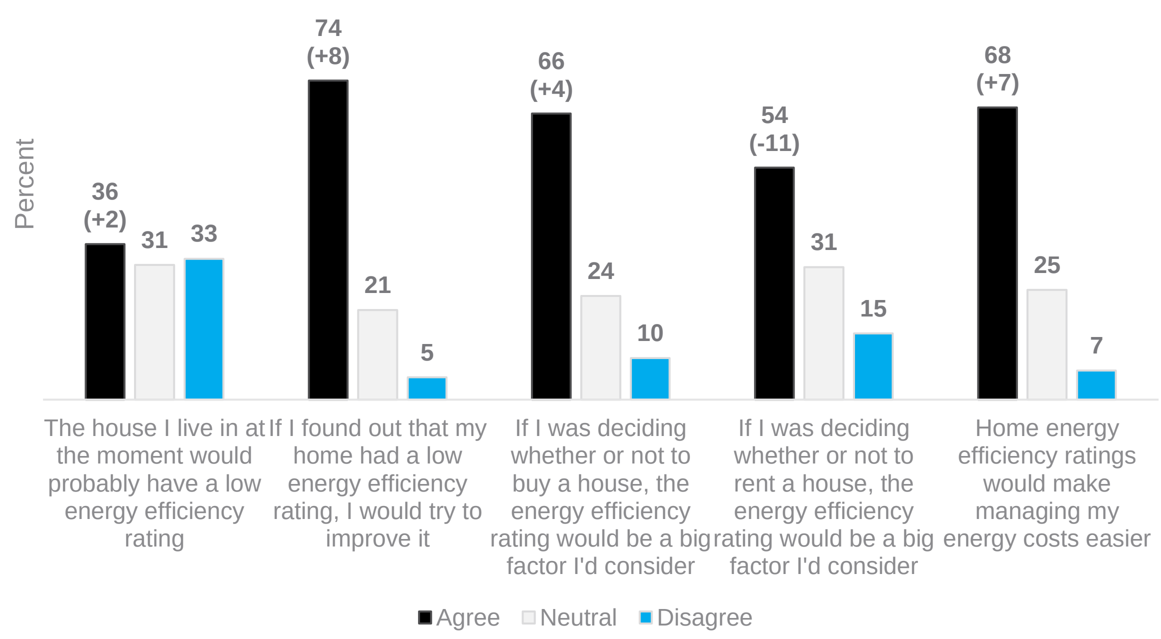
Base: Consumers in TAS (n=208)

Housing energy efficiency

More Tasmanians agree that a household energy rating system would help them manage costs than last year.

- 68% of households agree that home energy ratings would make managing costs easier (up 7%).
- 74% of home-owners say they would try to improve their home's energy efficiency rating if they found out it had a low rating (up 8%).
- 66% say that an energy efficiency rating would be a big factor they would consider when buying a house.
- 54% of renters say that an energy efficiency rating would be a big factor they would consider when renting a house (down 11%, from small sample).

Do you agree or disagree with the following? (%)



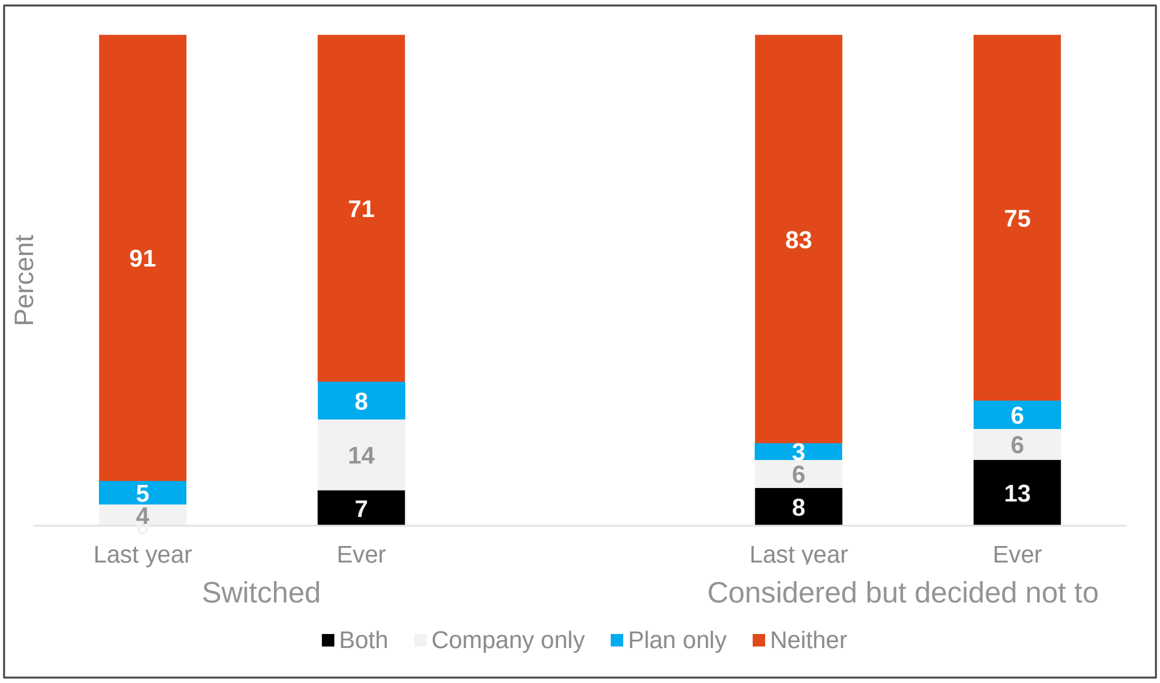
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in TAS (n=208)
Base for 'I would try to improve my home energy efficiency': Home-owners in TAS (n=154)
Base for 'consider energy rating when renting': Renters in TAS (n=52)

Switching behaviour

Tasmania saw a new retailer enter the market in February 2019 however at this stage switching rates remain the lowest of any state or territory.

- The vast majority of Tasmanian households have not switched company or plans in the past year (91%).
- 83% have not considered switching either company or plans in the past year.

Which of the following have you done? (%)



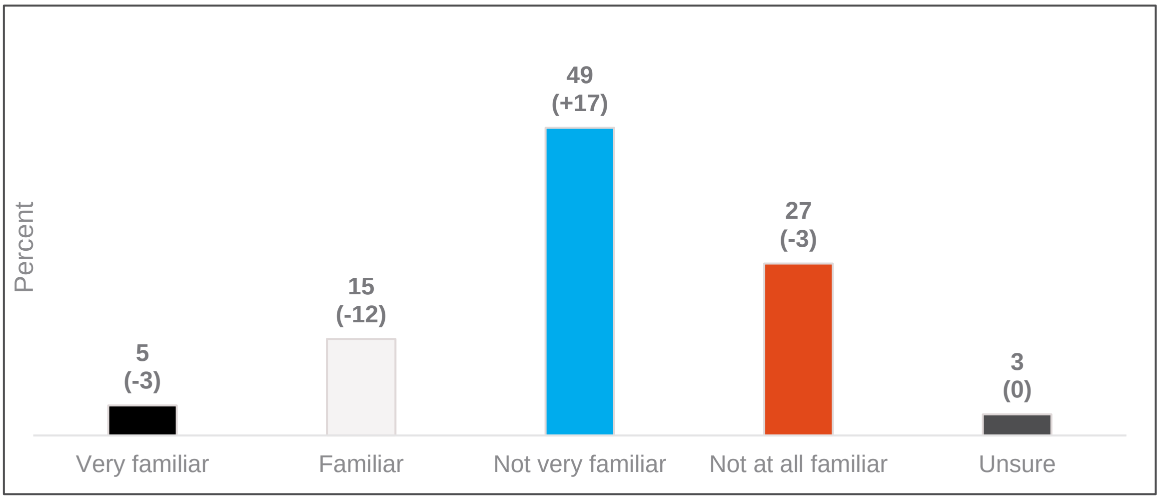
Base: Consumers in TAS (n=208)

Awareness of the Energy Ombudsman

Familiarity with the Energy Ombudsman fell among Tasmanian household respondents in this survey.

- 5% are very familiar with the Ombudsman and 15% are familiar. The total who say they are either very familiar or familiar with the Energy Ombudsman is down 15% on last year's survey.

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



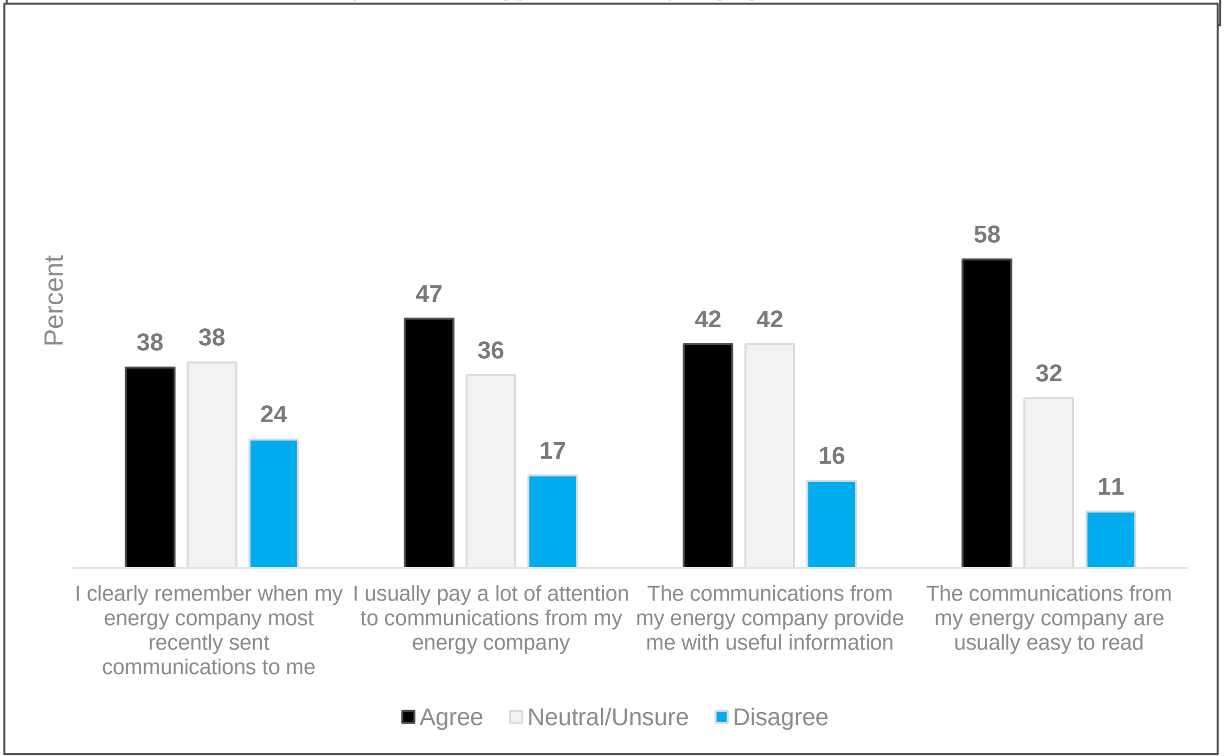
Base: Consumers in TAS (n=208)

Communications from energy providers

Less than half of Tasmanian household consumers agree that the communications from their energy company provide useful information.

- Only 58% agreed that communications from energy companies are easy to read, with 42% agreeing that the communications provided useful information.
- 47% agree that they usually pay a lot of attention to communications from their energy company and fewer still (38%) can clearly remember when their energy company last sent them information.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



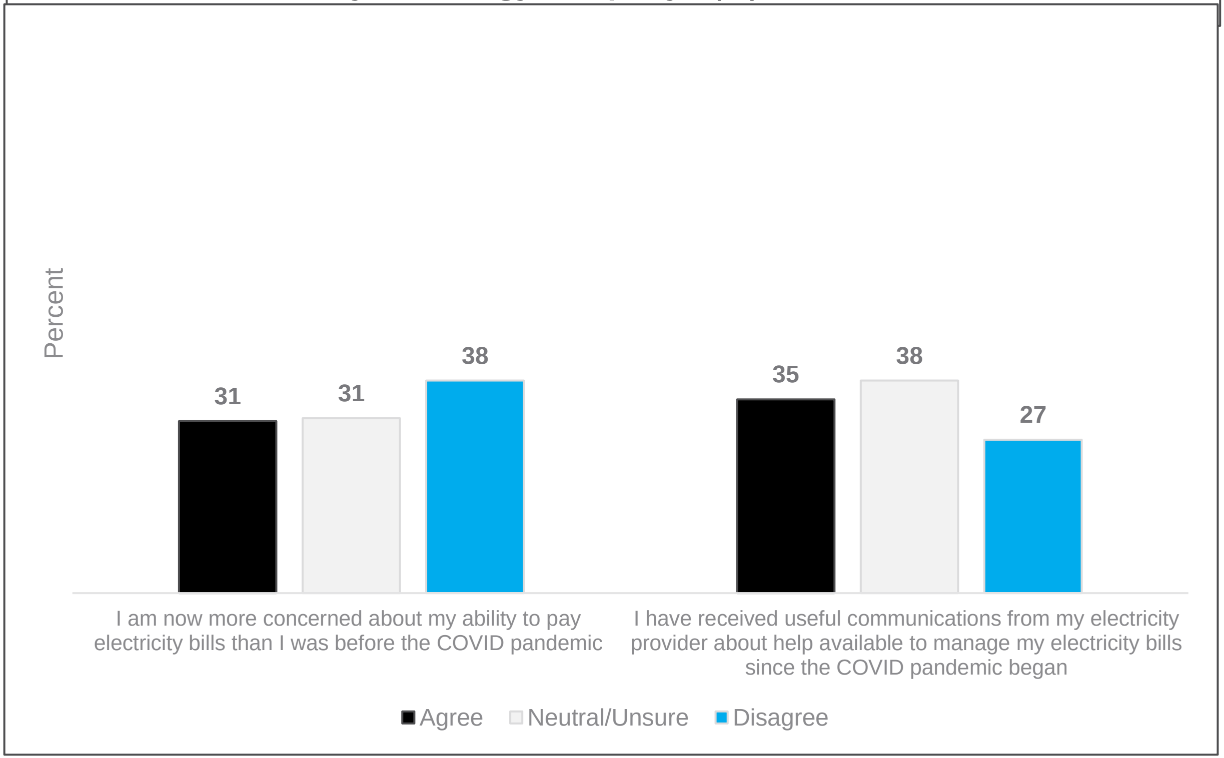
Base: Consumers in TAS (n=208)

Effects of COVID-19

A third of Tasmanian households agree that they are now more concerned about how to pay electricity bills than before the start of the COVID-19 pandemic (31%).

- 35% say they have received useful communications from their electricity provider about how to manage bills during the pandemic.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



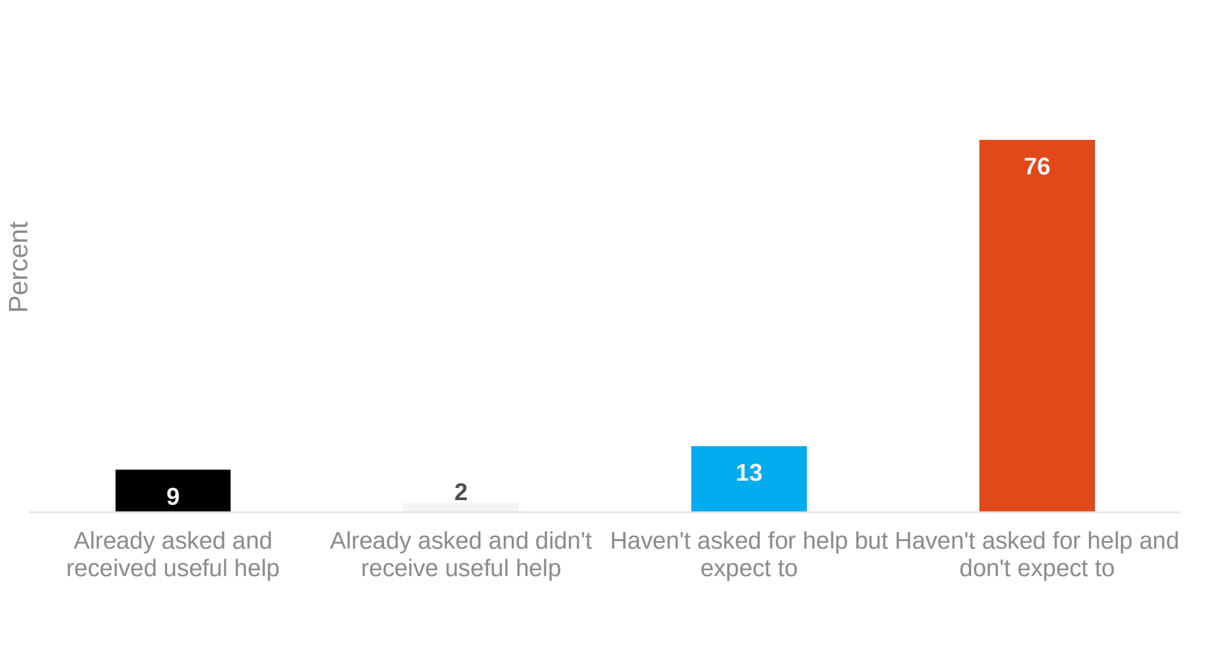
Base: Consumers in TAS (n=208)

Asking for help from electricity provider

24% of Tasmanian households have either asked for help to manage their electricity bills since the pandemic or expect to do so.

- Of the 11% of households who have already asked for help from their electricity provider, most have received useful assistance (9%).
- 13% of households have not yet required assistance but expect to in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)



Base: Consumers in TAS (n=208)

Australian Capital Territory

Overall satisfaction

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

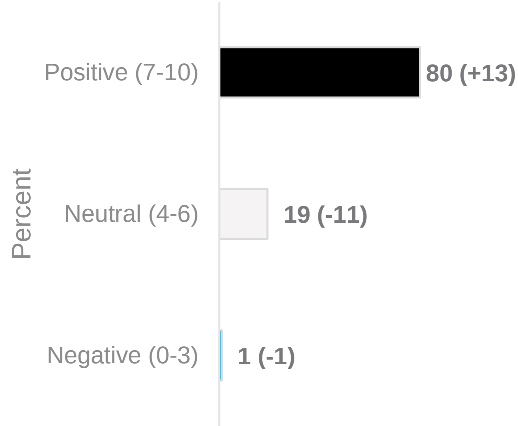
- 80% now say they are satisfied (up 13%).

Satisfaction with the level of competition has held steady.

- 48% of ACT household consumers say they are satisfied.

Overall Satisfaction

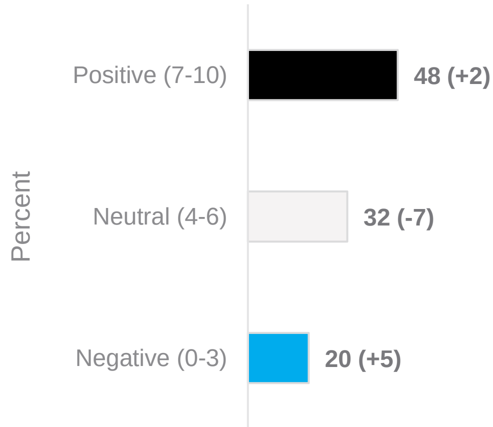
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in ACT (n=209)

Satisfaction with competition

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



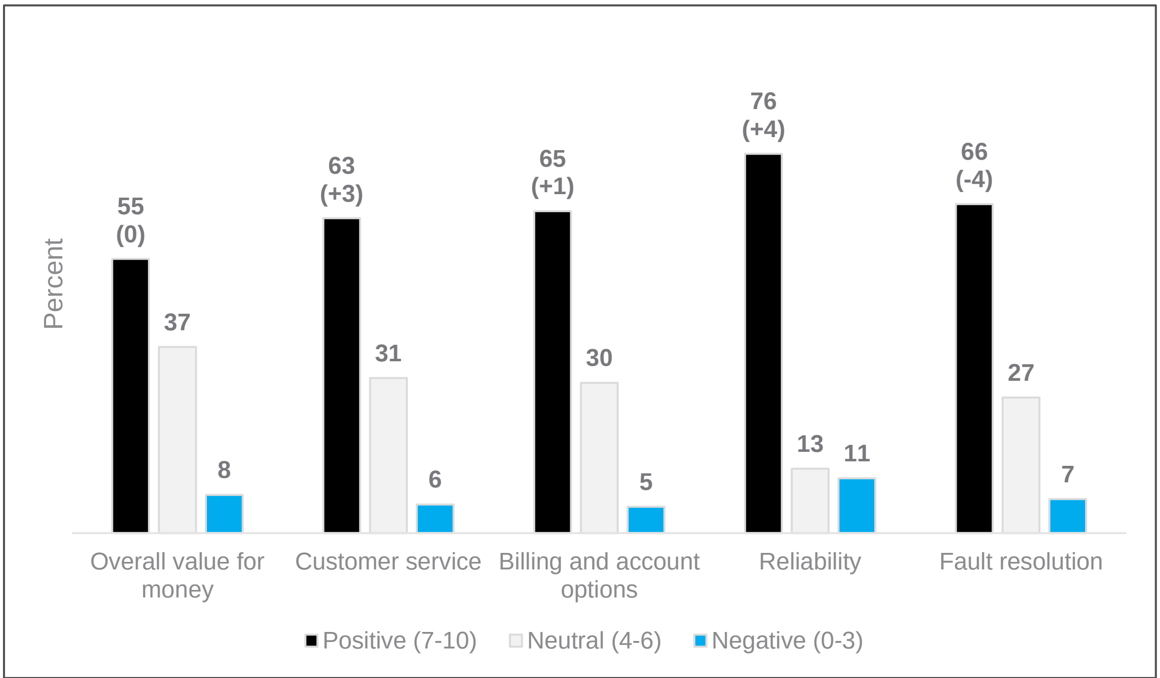
Base: Consumers in ACT (n=209)

Satisfaction with electricity

Satisfaction with the overall value for money of electricity services has remained stable.

- Satisfaction with reliability is the highest of all attributes at 76%.
- Of those who experienced a power outage, 66% are satisfied with the fault resolution.
- Satisfaction with the value for money of their electricity service is unchanged at 55%.
- 63% of ACT household consumers report being satisfied with the overall quality of customer service and 65% are satisfied with their billing and account options.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: ACT electricity consumers (n=209)

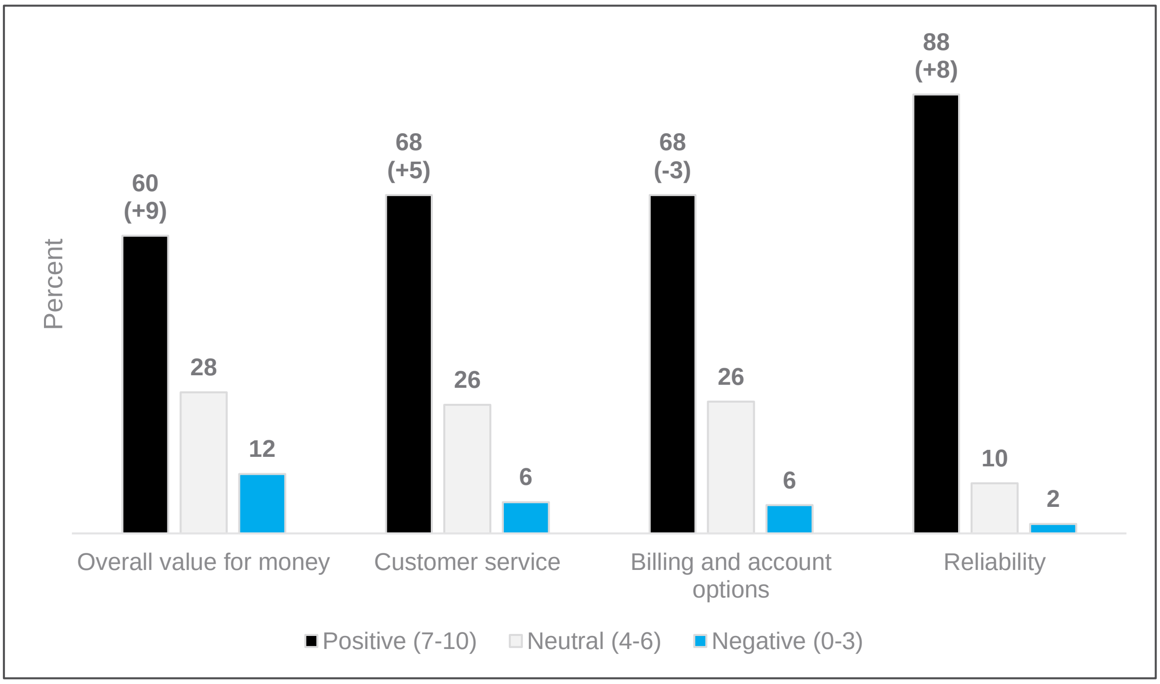
Base for fault resolution: Those who had a power outage or rated 0 to 9 satisfaction with outage in ACT (n=103)

Satisfaction with gas

Satisfaction with the value for money and customer service for gas services has improved in the ACT.

- Satisfaction with overall value for money of gas services increased by 9% (to 60%).
- Satisfaction with gas reliability remains high at 88% (up 8%).
- Satisfaction with customer service increased by 5% (to 68%).
- Satisfaction with the available billing and account options is at 68%.

How would you rate the [attribute]?
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Consumers in ACT with gas supply (n=159)

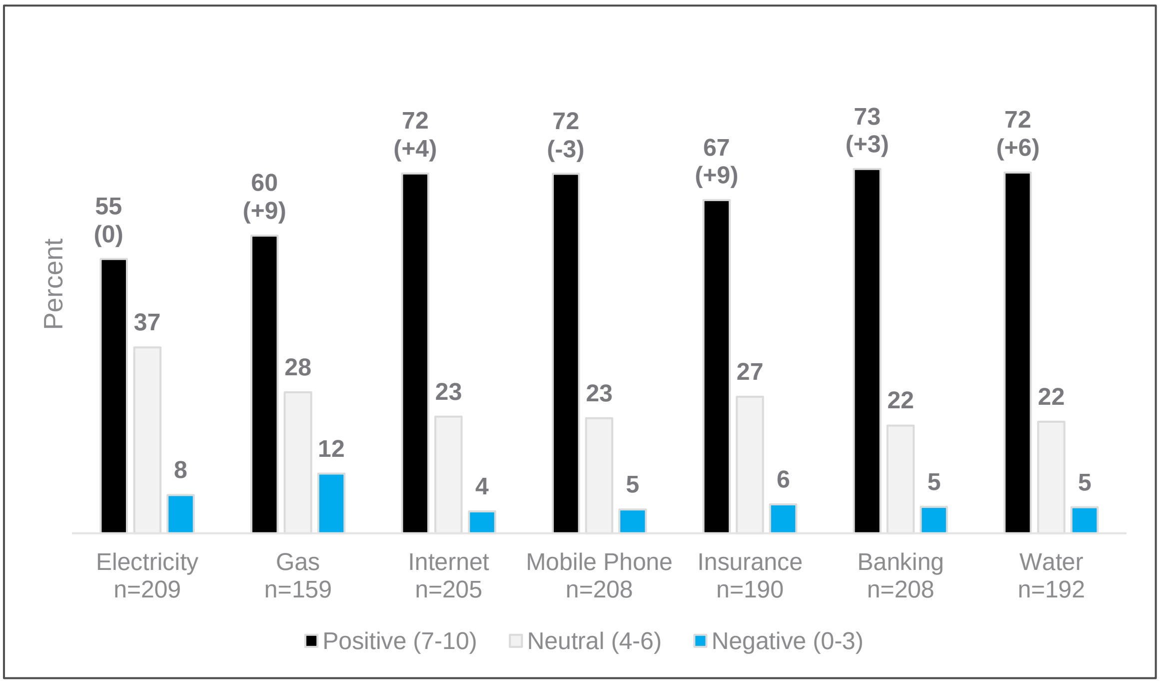
Rating of utilities and services

Gas services narrowed the gap to other utilities and services in terms of value for money, but both gas and electricity continue to trail.

- Ratings for value for money of gas and electricity services are behind other utilities and services, at 60% positive for gas (up 9%) and 55% for electricity (unchanged).
- The lowest rating for a non-energy service was for insurance (67%).

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'



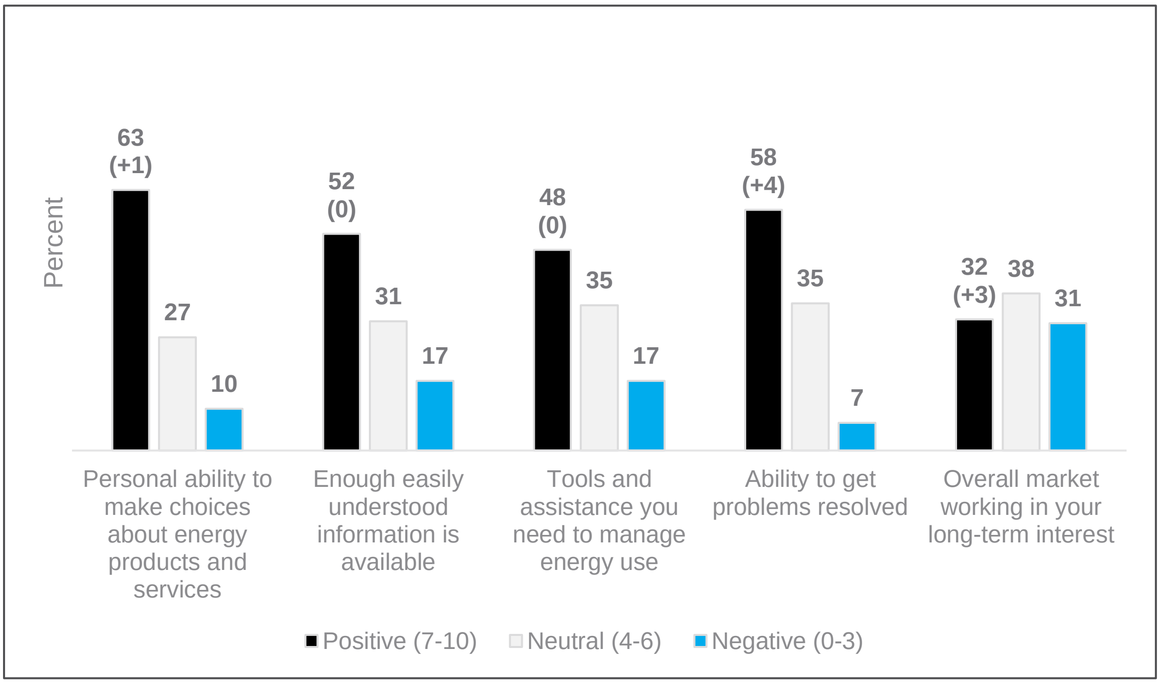
Base: Consumers in ACT with these services

Confidence in information, tools and a working market

All changes on these measures amongst ACT household consumers are within the margin of error.

- 32% say they are confident the overall market is working in their long-term interests.
- 58% say they are confident in their ability to get problems resolved.
- 63% say they are confident in their own ability to make choices about energy products and services.
- 52% are confident in the availability of easily understood information.
- 48% are confident in the availability of tools and assistance to help consumers manage their energy use.

How would you rate the following? (%)
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in ACT (n=209)

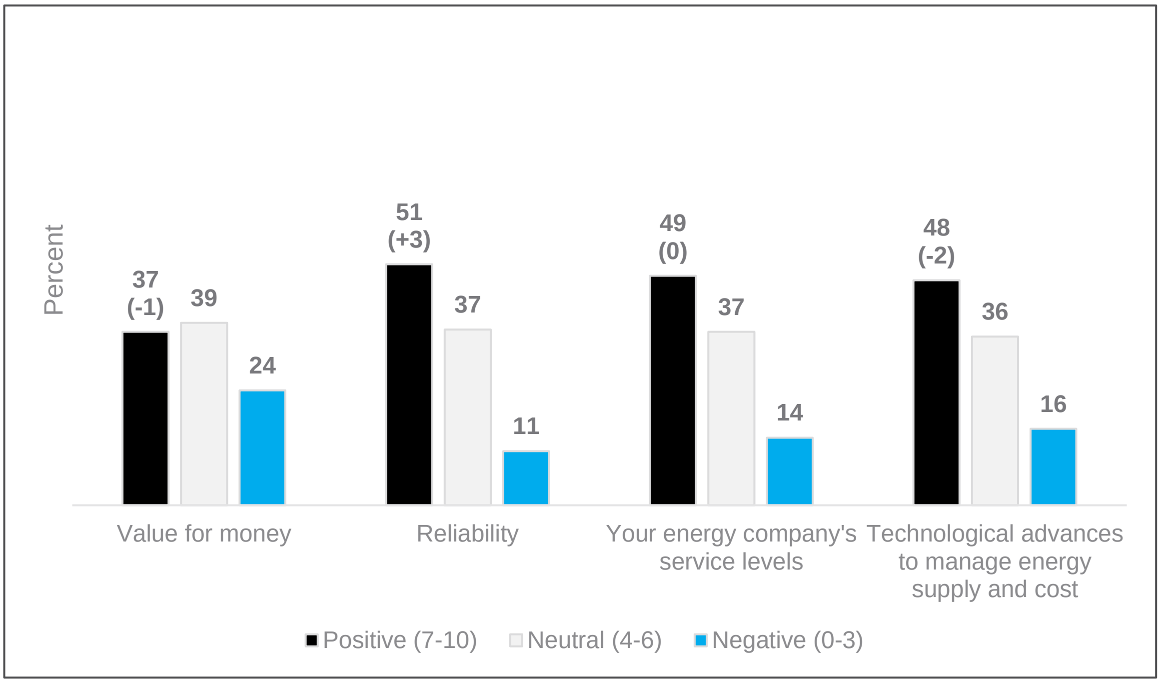
Confidence in long term outcomes

Confidence that market outcomes will improve in the future has held steady.

- Around half of consumers in the ACT are confident that the market will provide better reliability (51%), that service levels will improve in the next five years (49%) and that the market will provide technological advances to manage their energy supply and costs (48%).
- Fewer are confident the market will provide better value for money in the future (37%).

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'



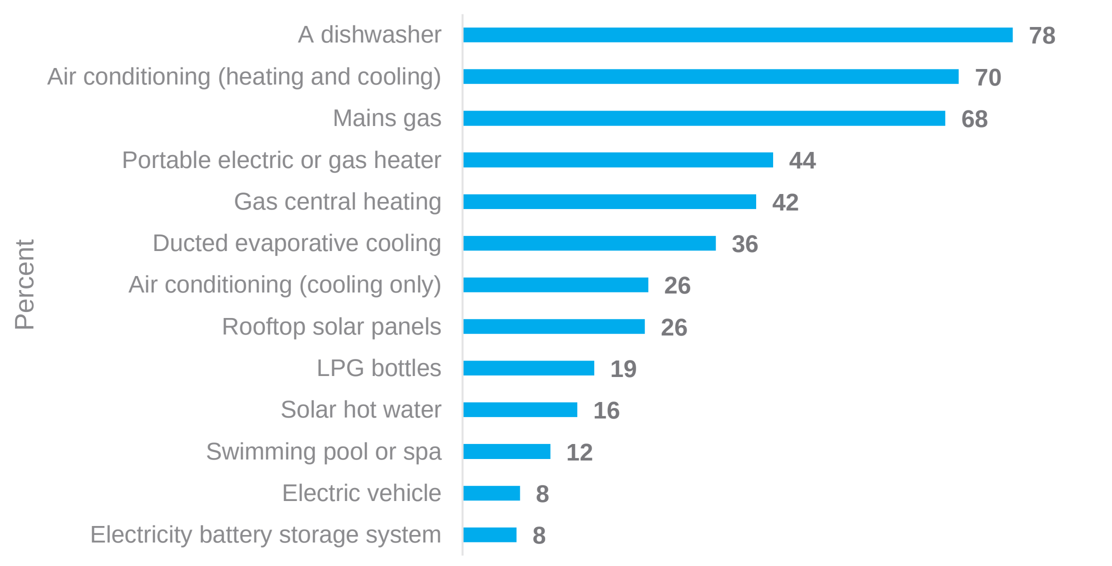
Base: Consumers in ACT (n=209)

Uptake of technologies

There is an increase in the proportion of ACT household consumers who have a digital/smart meter and over half of these use it to control their energy costs.

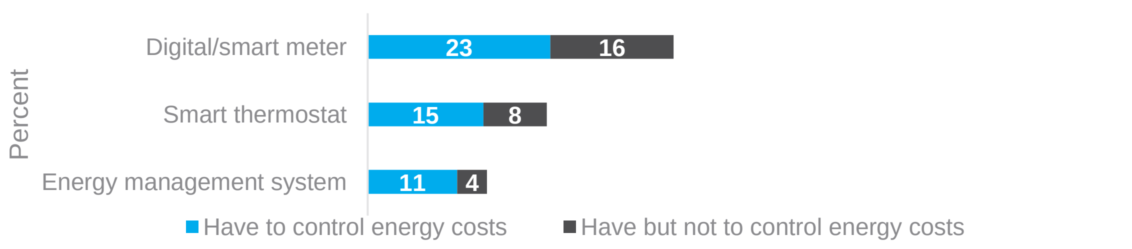
- 39% say they have a smart/digital meter (up 14%) and 23% say they use it to manage their energy use and costs.
- 70% say they have air conditioning for heating and cooling (up 11%).
- 26% say they have rooftop solar panels.

Which of the following do you have at your home? (%)



Base: Consumers in ACT (n=209)

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 ACT (n=209)

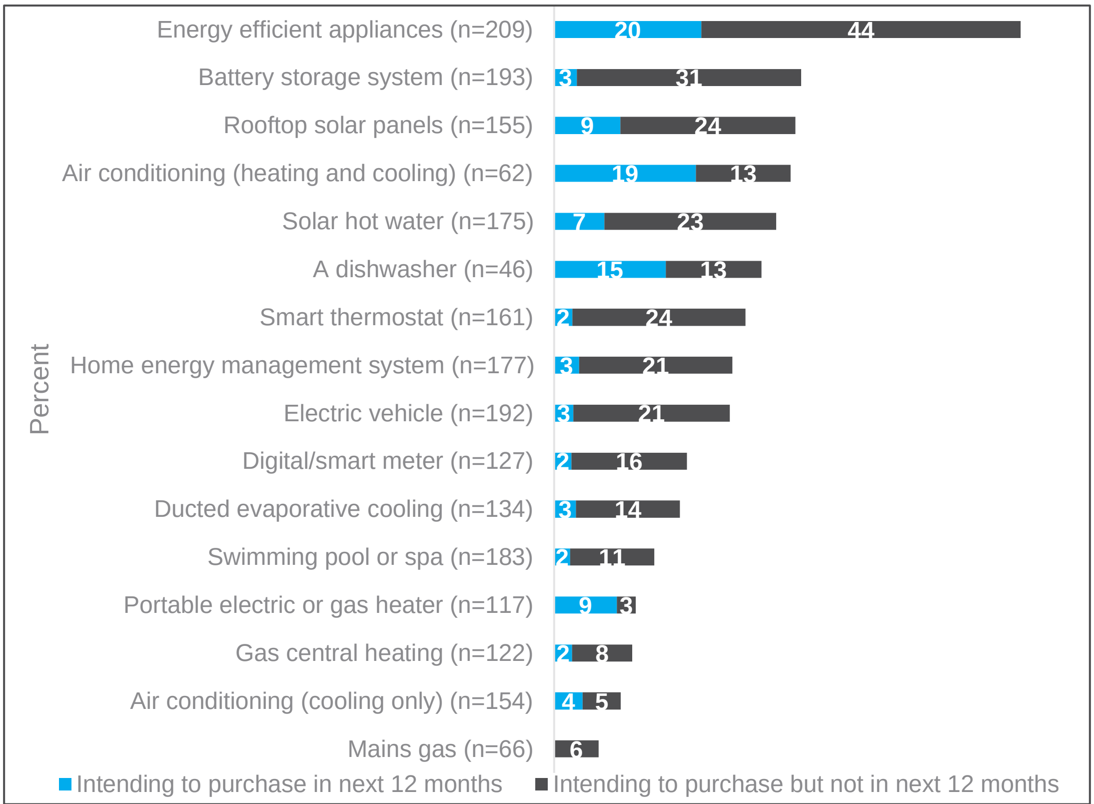
Activity

Future uptake of technologies

Consumers in the ACT are more likely to consider electric vehicles and battery storage systems than those in other states and territories, although there is a slight drop in interest compared with December 2019.

- 34% of ACT households are considering a battery storage system.
- 24% say they are considering purchasing an electric vehicle.
- 33% of those without solar, say they are considering rooftop solar panels, with 9% intending to purchase in the next year.
- 32% are considering air conditioning for both cooling and heating (up 12%).

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 the ACT

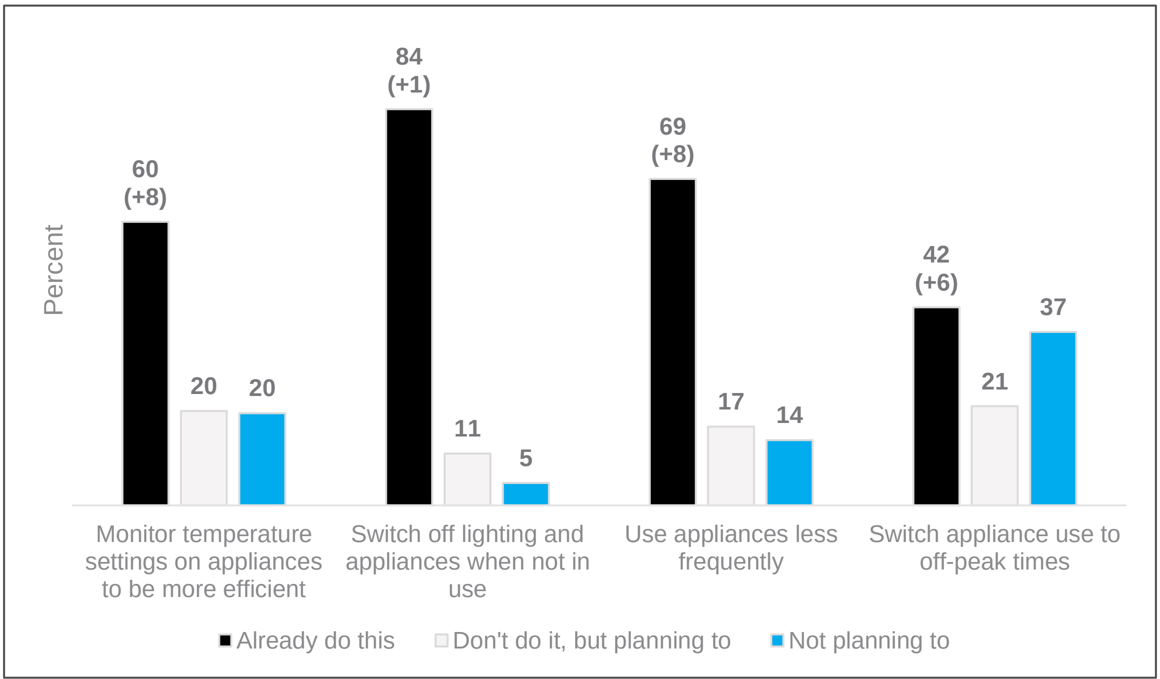
Note: For readability, percentages have been omitted where they are less than 2%

Energy saving practices

There has been an increase in ACT household consumers who are actively trying to manage their energy use, across most measures.

- 69% say they use appliances less frequently (up 8%) and 60% say they monitor temperature settings on appliances (up 8%).
- 84% say they switch off lighting and appliances when not in use, which is the most observed action.
- 42% say they already have switched appliance use to off-peak times (up 6%).

Which of the following do you do or plan to do? (%)



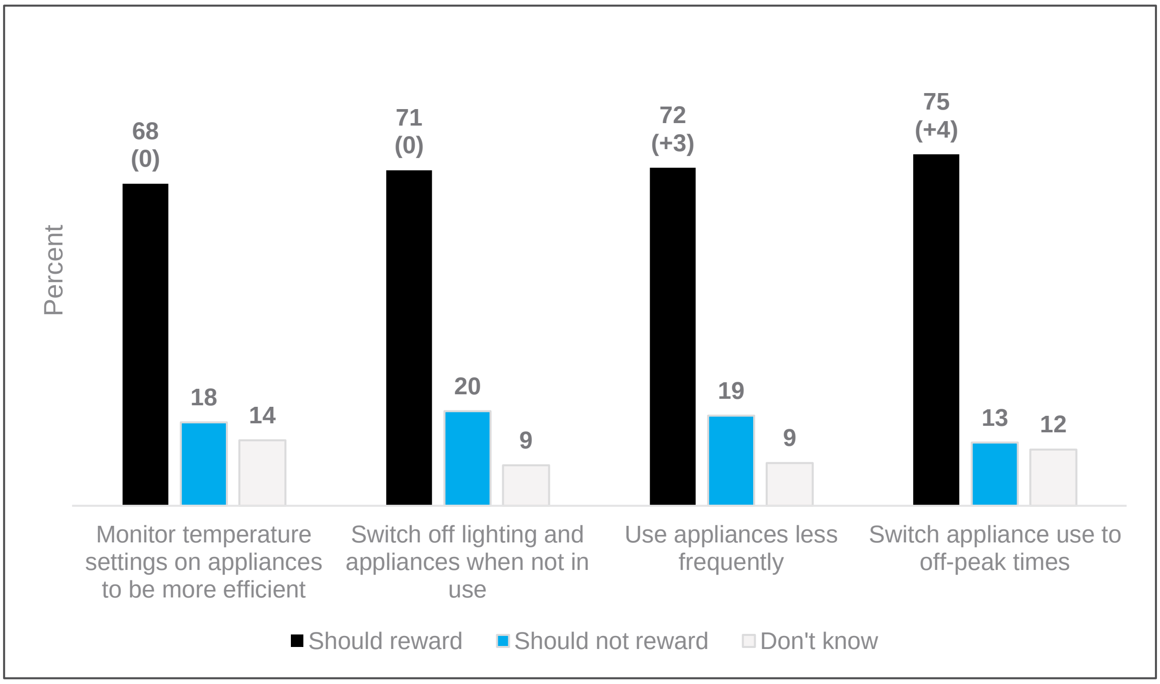
Base: Consumers in ACT (n=209)

Reward for reducing energy use

Two-thirds of ACT household consumers think they should be rewarded for taking action to reduce their energy usage.

- 75% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 72% think electricity companies should do more to financially reward customers who use appliances less frequently.
- Similarly high proportions of consumers think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use, and who monitor temperature settings on appliances to be more efficient..

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



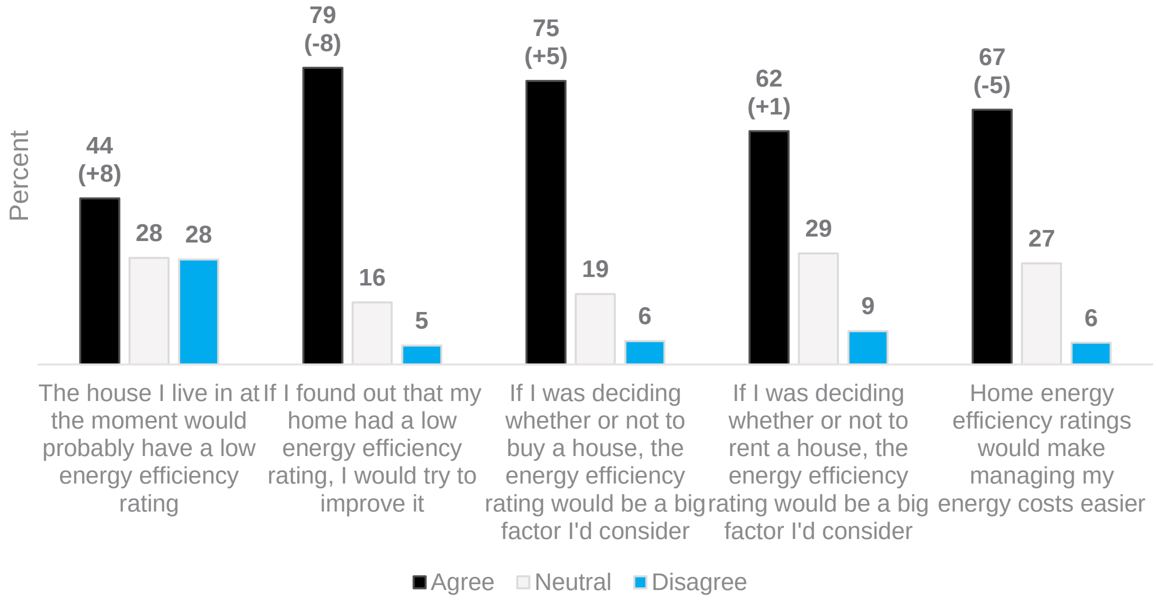
Base: Consumers in ACT (n=209)

Housing energy efficiency

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

- 79% of homeowners say they would try to improve their home's energy rating if they found out it had a low rating (down 8%).
- 44% of consumers say their house would have a low energy efficiency (up 8%).
- 75% say energy efficiency would be a big factor when deciding to purchase a house (up 5%).
- 67% say a home energy efficiency rating would make managing their energy costs easier (down 5%).
- 62% of renters say an energy rating would be a big factor they would consider when renting a house.

Do you agree or disagree with the following? (%)



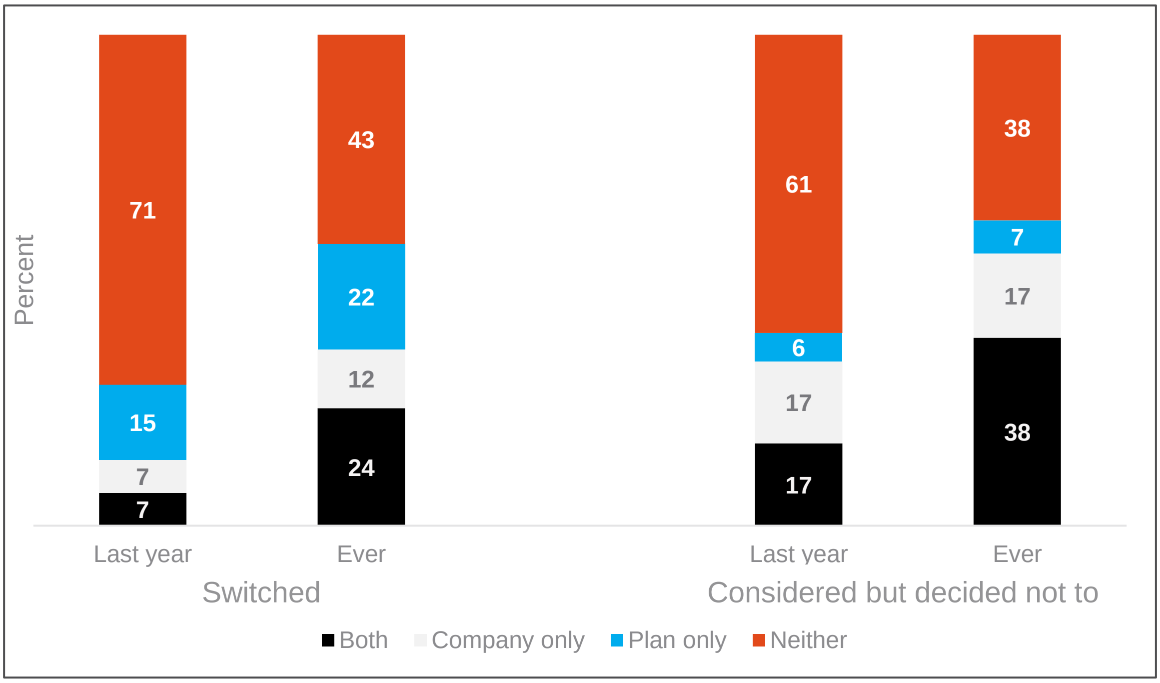
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in ACT (n=209)
Base for 'I would try to improve my home energy efficiency': Home-owners in ACT (n=140)
Base for 'consider energy rating when renting': Renters in ACT (n=68)

Switching behaviour

Almost a third of ACT household consumers say they switched energy company and/or plan in the past twelve months.

- 29% report switching companies or plans in the past year, while 39% say they considered switching companies or plans in the same period but did not do so.
- 43% say that they have never switched energy companies or plans.

Which of the following have you done? (%)



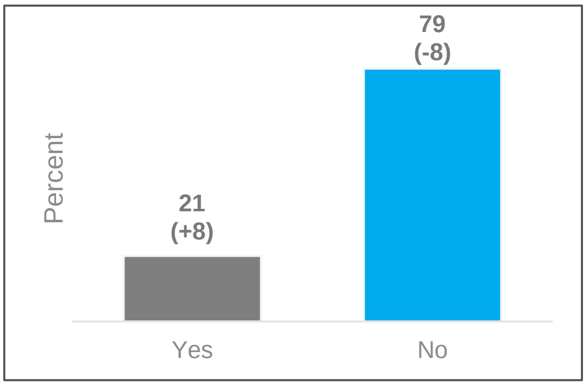
Base: Consumers in ACT (n=209)

Reasons for considering switching

Searching for a better plan is common when considering a switch, with value for money the key driver for changing companies.

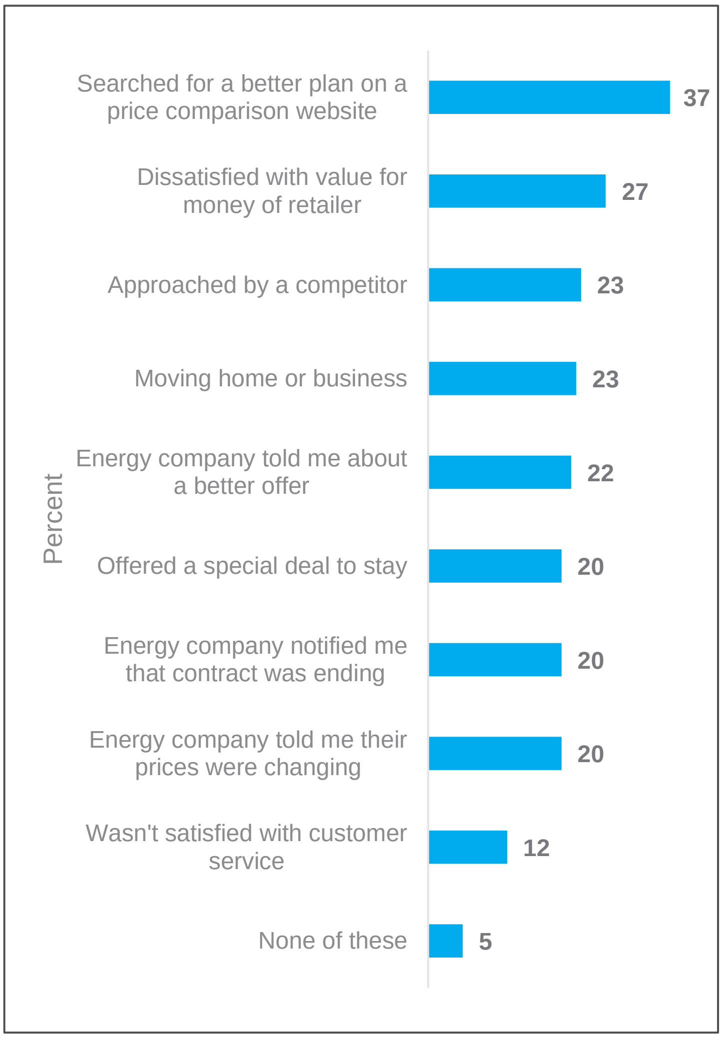
- 37% searched for a better plan on a price comparison website when they looked at switching.
- 27% say they were dissatisfied with the value for money provided by their retailer.
- 21% of ACT household consumers intend to switch companies or plans in the next year (up 8%).

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



Base: Consumers in ACT (n=209)

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



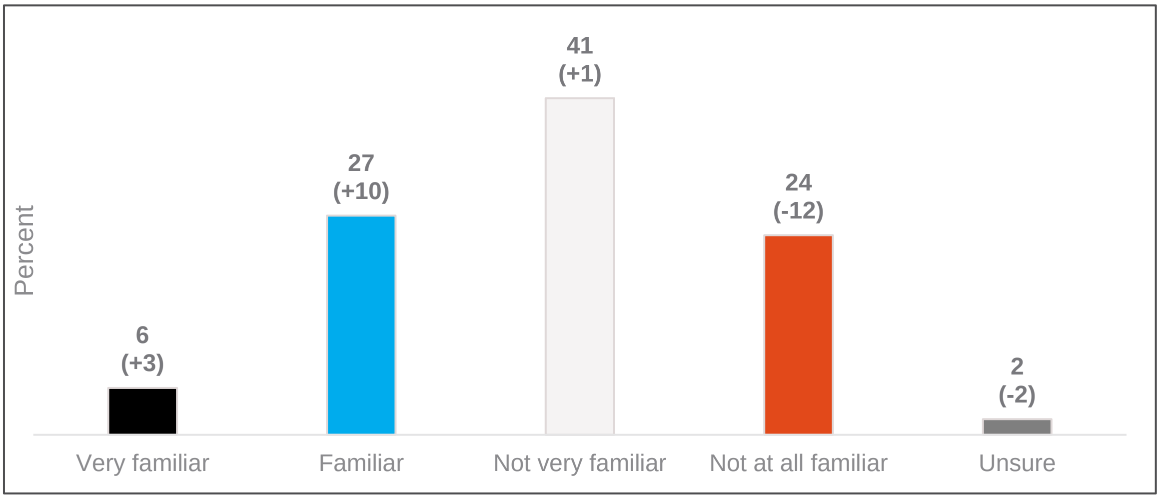
Base: Consumers in ACT who have switched or looked at switching in the past (n=132)

Awareness of the Energy Ombudsman

Consumers in the ACT are now more familiar with the Energy Ombudsman.

- A third of household consumers in the ACT say they are familiar or very familiar with the Energy Ombudsman (33%, up 13%).

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



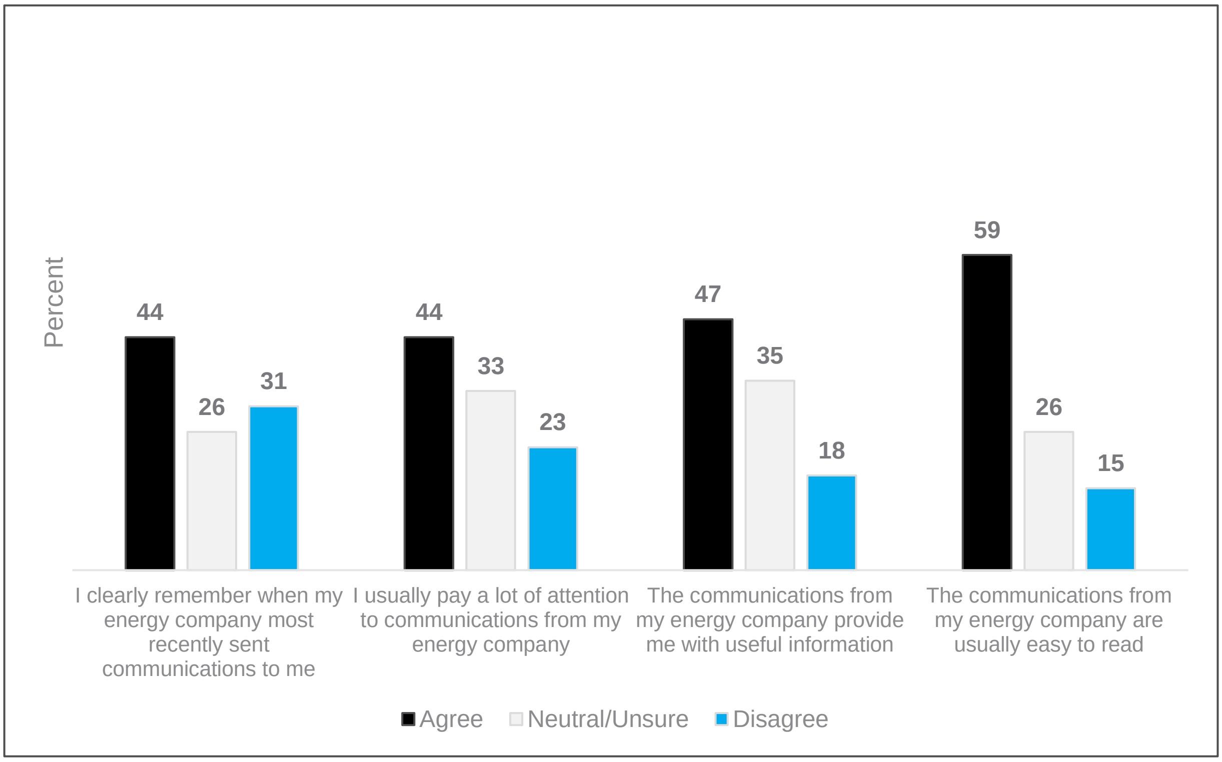
Base: Consumers in ACT (n=209)

Communications from energy providers

Less than half of ACT household consumers agree that they recall their energy company's most recent communication.

- Only 44% agree that they clearly remember when they most recently received communication from their energy company and the same proportion agree that they pay a lot of attention to communications from their energy company.
- Only 59% agree that communications from their energy company are easy to read.
- Only 47% agree that their energy company's communications provide useful information.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



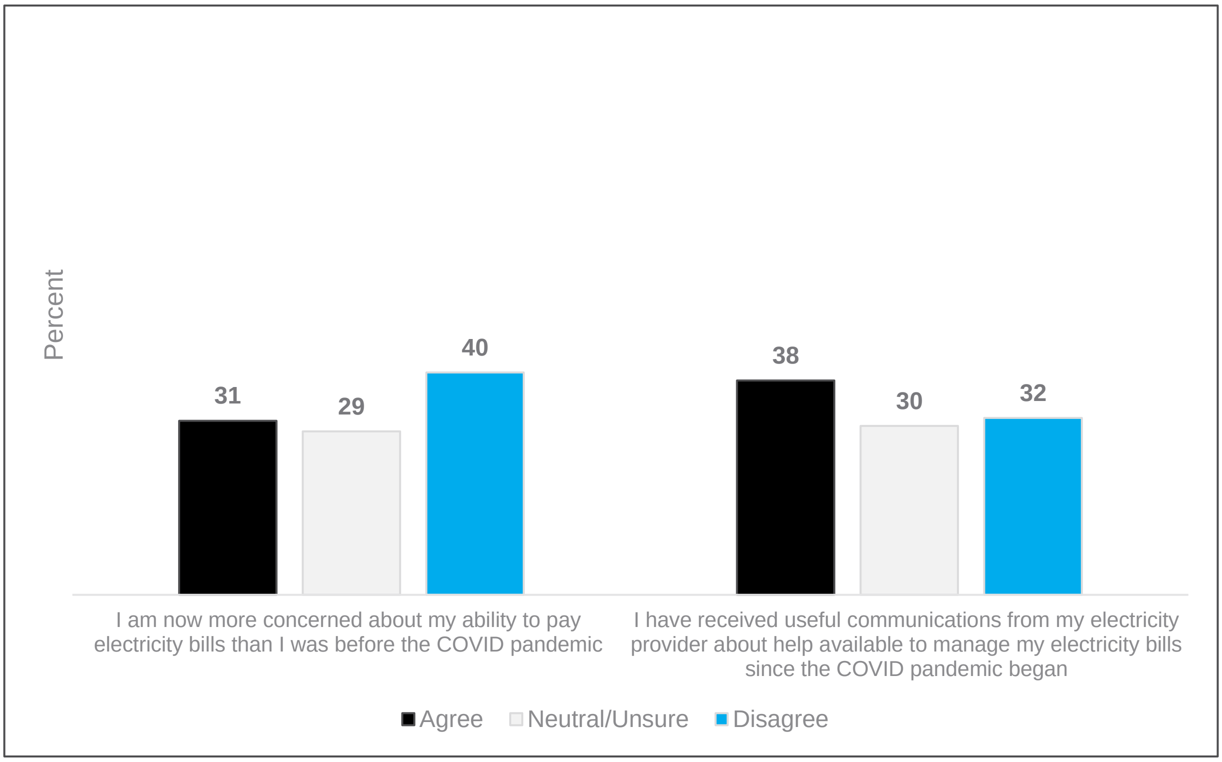
Base: Consumers in ACT (n=209)

Effects of COVID-19

The communication received from energy companies throughout the pandemic has largely been useful for ACT households.

- 38% agree they have received useful communications from their provider about help to manage their bills since the pandemic began.
- About a third (31%) are now more concerned about their ability to pay electricity bills than they were before the pandemic.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



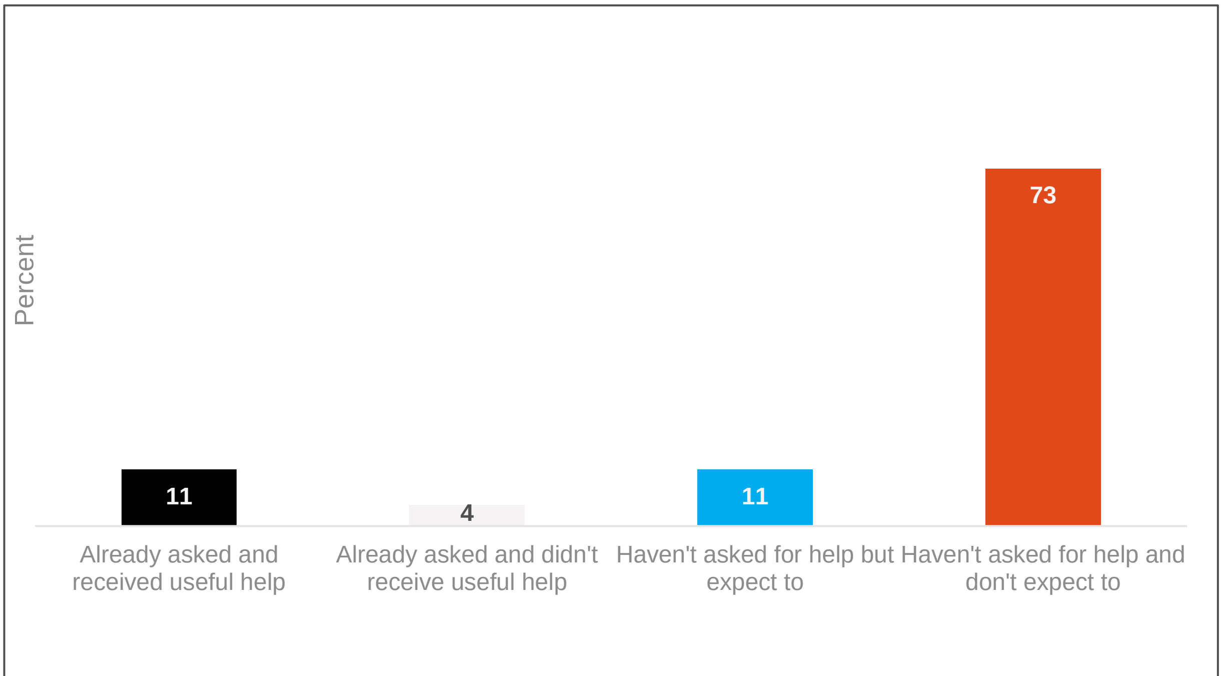
Base: Consumers in ACT (n=209)

Asking for help from electricity provider

Around 1 in 4 ACT energy consumers have already sought help from their energy company since the pandemic began or expect to do so in the future.

- Of the 16% of households who have already asked for help from their electricity provider, most have received useful assistance (11%).
- 11% of ACT households have not yet required assistance but expect to in the the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)



Base: Consumers in ACT (n=209)

Western Australia

Overall satisfaction

Overall satisfaction with electricity and gas services in Western Australia has increased.

- 83% are satisfied with their electricity and gas services (up 5%).

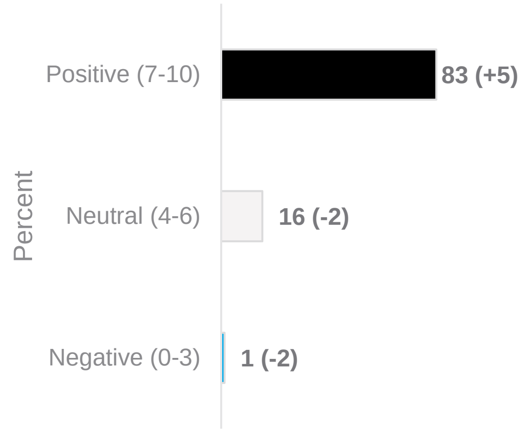
Just over half of household consumers in Western Australia are satisfied with the level of competition in the market.

- 51% say they are satisfied with competition levels.

Satisfaction

Overall Satisfaction

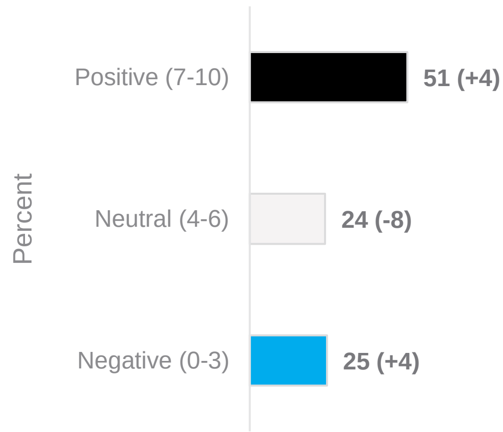
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in WA (n=309)

Satisfaction with competition

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



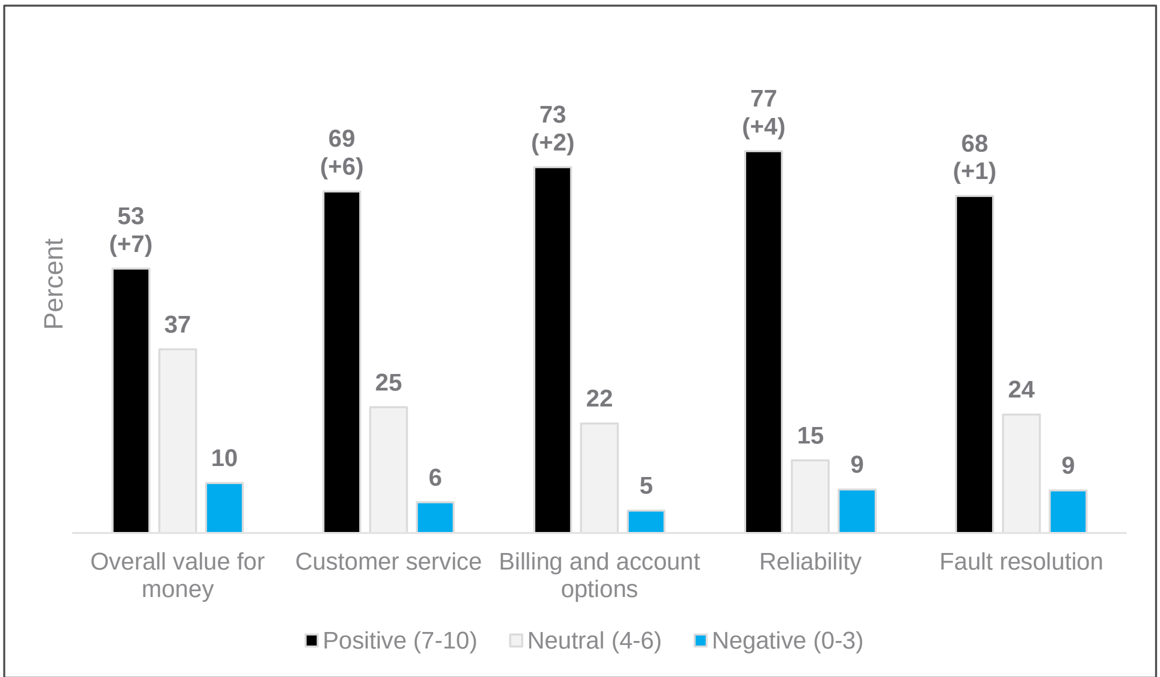
Base: Consumers in WA (n=309)

Satisfaction with electricity

Satisfaction with overall value for money and customer service has increased in Western Australia over the past year.

- 69% say they are satisfied with the customer service they receive (up 6%).
- Satisfaction with overall value for money of electricity services increased by 7% (to 53%), but this measure still lags other satisfaction measures.
- 77% say they are satisfied with the reliability of their electricity supply.
- 73% say they are satisfied with their billing and account options.
- Satisfaction among those who experienced a power outage with the fault resolution provided to them is stable at 68%.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



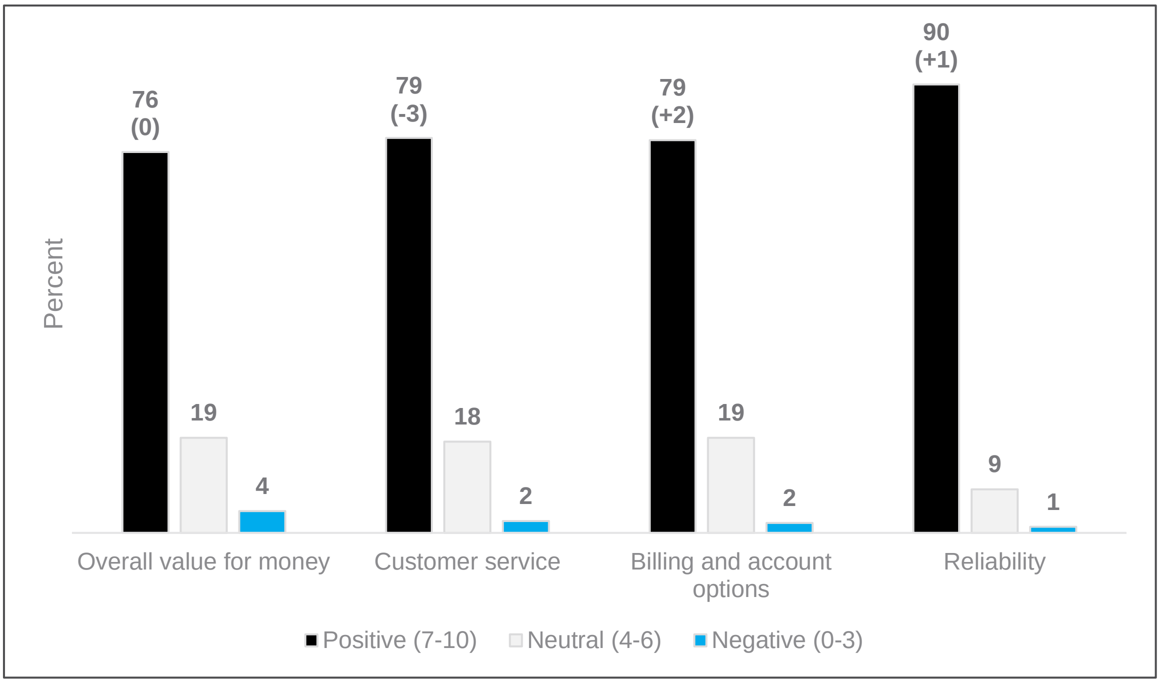
Base: Consumers in WA with electricity supply (n=309)
Base for fault resolution: Those in WA who rated 0 to 9 satisfaction and had a power outage (n=164)

Satisfaction with gas

Satisfaction among Western Australian household gas consumers has remained relatively stable.

- Satisfaction with reliability of gas services is at 90%.
- Satisfaction with customer service and with billing and account options are both at 79%.
- Satisfaction with overall value for money for gas is unchanged at 76%.

How would you rate the [attribute]? (%)
0-10 scale, 0='not at all satisfied', 10='very satisfied'



Base: Consumers in WA with gas supply (n=251)

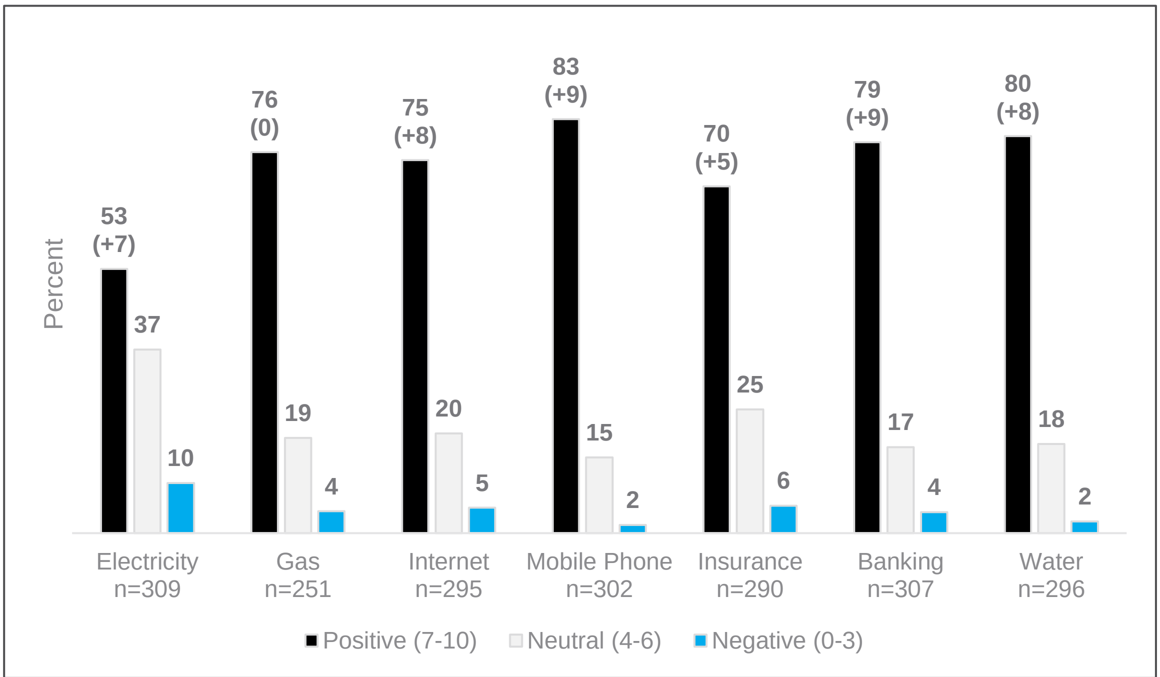
Satisfaction with utilities and services

Value for money ratings improved for all utilities and services, except for gas which has remained stable.

- 76% of households were satisfied with the value for money of their gas service.
- Although satisfaction with electricity increased by 7% (to 53%), it is still well behind all other utilities and services, with insurance the next lowest rated at 70%.

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

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



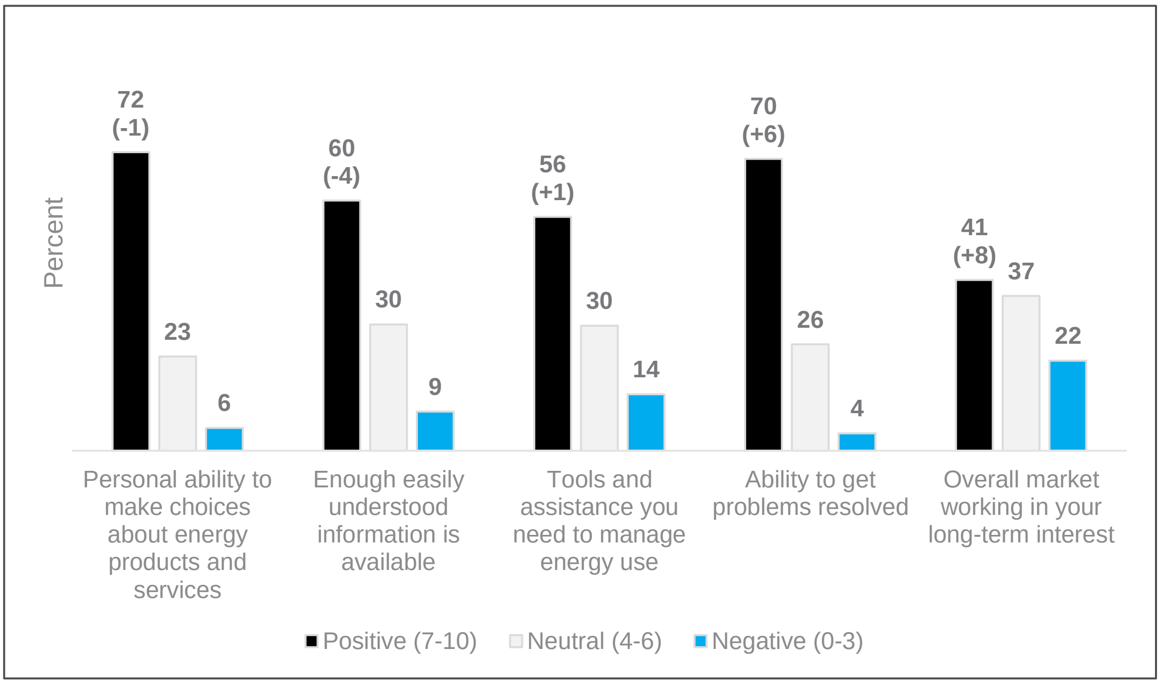
Base: Consumers in WA (n=309)

Confidence in information, tools, and a working market

West Australian consumers showed greater confidence in their ability to get problems resolved through their energy company or a third party, and in the overall market working in their long-term interest.

- 70% are confident in their ability to get problems resolved (up 6%).
- 41% of consumers were confident that the market is working in their long-term interest (up 8%) – this remains low compared to other measures.
- 72% are confident in their own ability to make choices about energy products.
- 60% say there is enough easily understood information available.
- 56% say there are enough tools to manage their energy usage.

How would you rate the following?
0-10 scale, 0='not at all confident', 10='very confident'



Base: Consumers in WA (n=309)

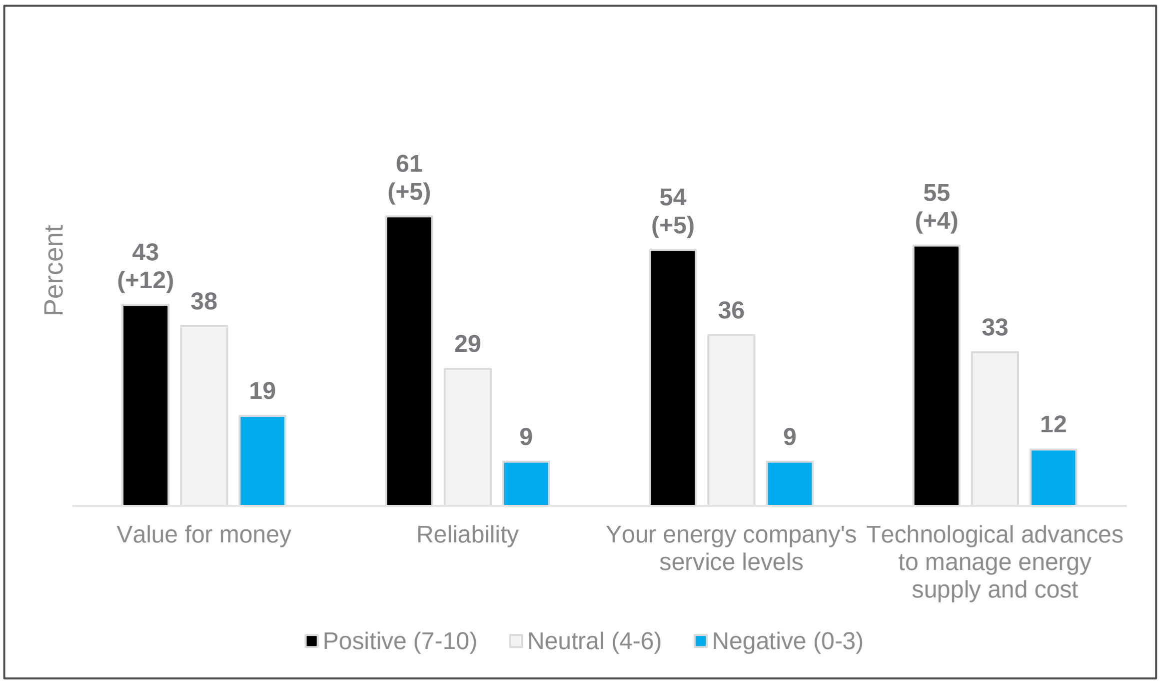
Confidence in long term outcomes

West Australian consumer confidence in overall market outcomes in the future has increased.

- 43% of consumers expressed confidence that the market will deliver better overall value for money in the future (up 12%).
- 61% say they are confident the market would provide greater reliability in the future (up 5%).
- 54% are confident that the market will provide better service levels in the future (up 5%).
- 55% say they are confident that technological advances will improve energy management in terms of cost and supply.

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'



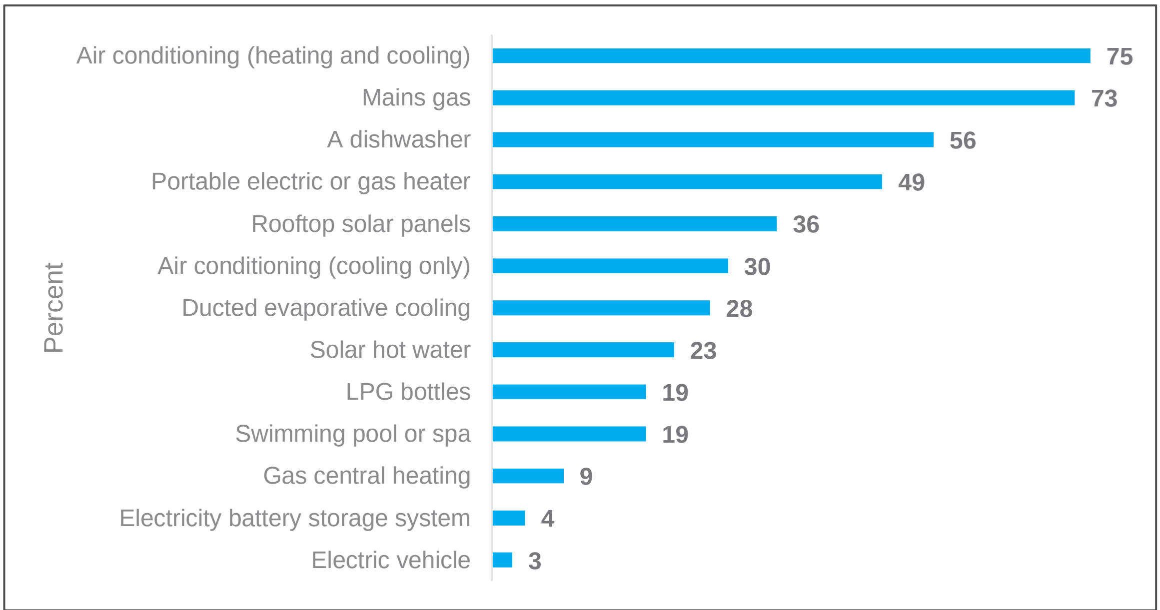
Base: Consumers in WA (n=309)

Uptake of technologies

A growing proportion of West Australian household consumers with a digital/smart meter say they use it to control their energy costs.

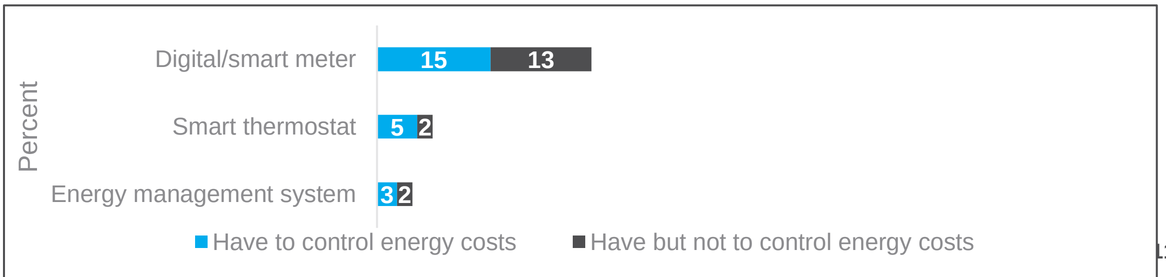
- 28% of WA households have a smart/digital meter, and over half of these report using it to manage their energy use and costs (15%). This has increased from 25% ownership and 11% usage last year.
- Solar hot water ownership is the highest in the country, with 23% of households having this appliance.
- 36% say they have rooftop solar panels and 23% say they have solar hot water.

Which of the following do you have at your home? (%)



Base: Consumers in WA (n=309)

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=309)

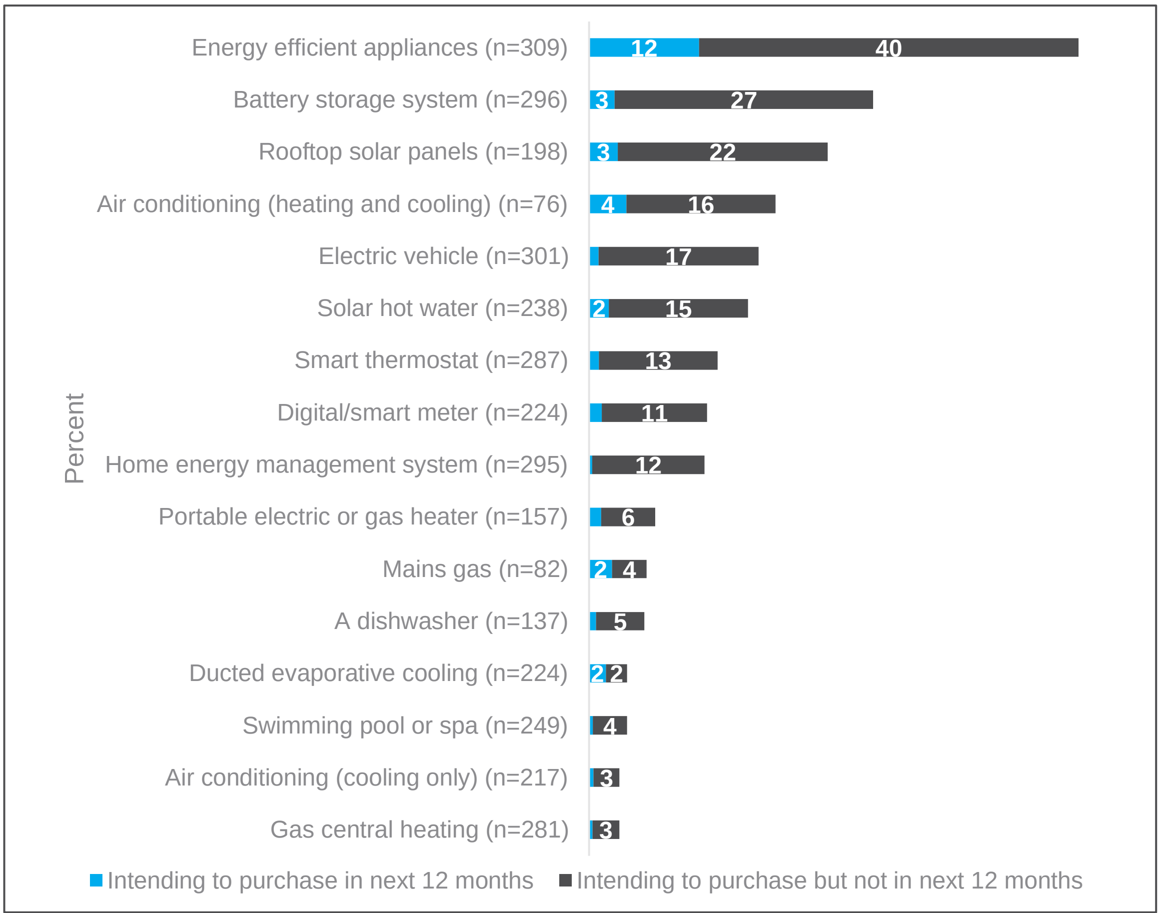
Activity

Future uptake of technologies

Nearly a third of Western Australian consumers are considering purchasing an electric battery storage system, and a quarter are considering rooftop solar.

- Proportions of households intending to buy energy technology at some point is at 52% for efficient appliances, 30% for battery storage, and 25% for rooftop solar.

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

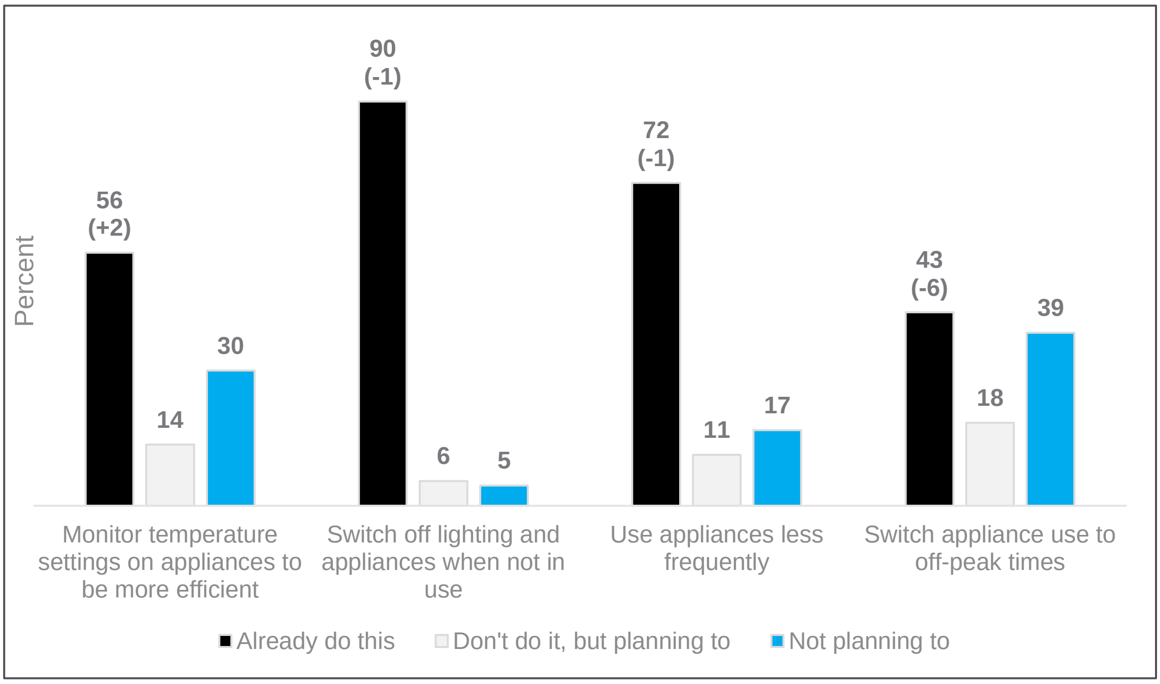
Note: For readability, percentages have been omitted where they are less than 2%

Energy saving practices

The proportion of Western Australian household consumers switching appliance use to off peak times has fallen.

- 43% say they already switch appliance use to off-peak times (down 6%).
- 90% of Western Australian household consumers say they switch off lighting and appliances when not in use.
- 72% say they use appliances less frequently.
- 56% report that they monitor temperature settings on appliances to be more efficient.

Which of the following do you do or plan to do? (%)



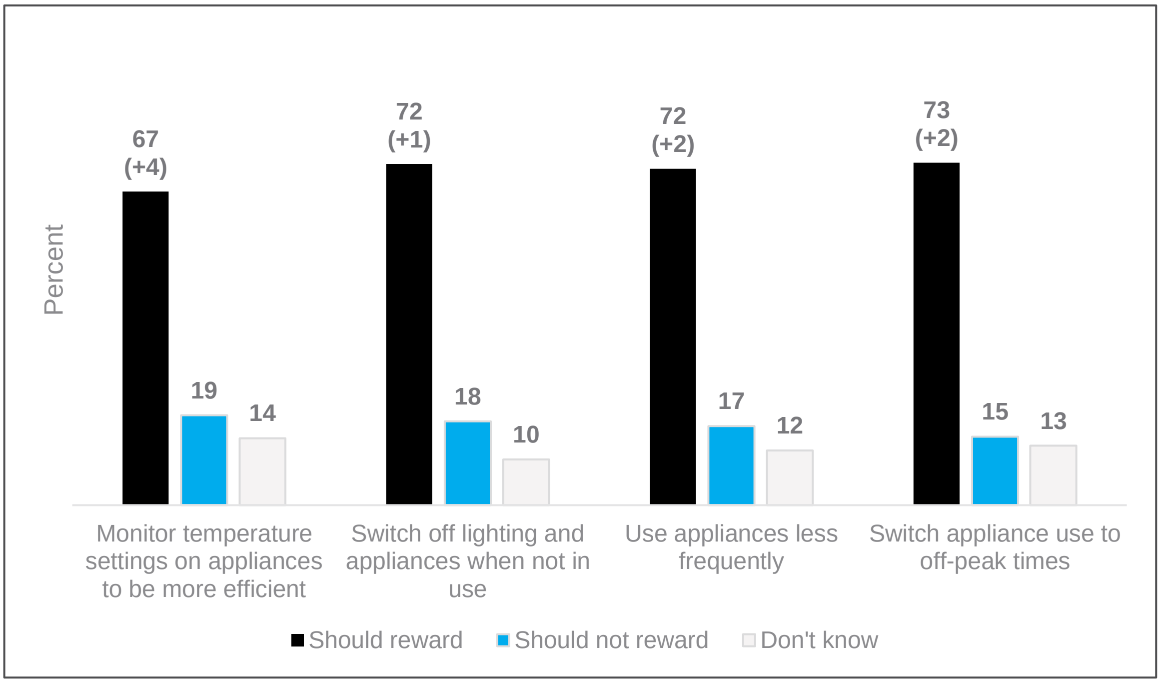
Base: Consumers in WA (n=309)

Reward for reducing energy use

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

- 73% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 72% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use.
- Similarly, 72% think electricity companies should do more to financially reward customers who use appliances less frequently.
- 67% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient.

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



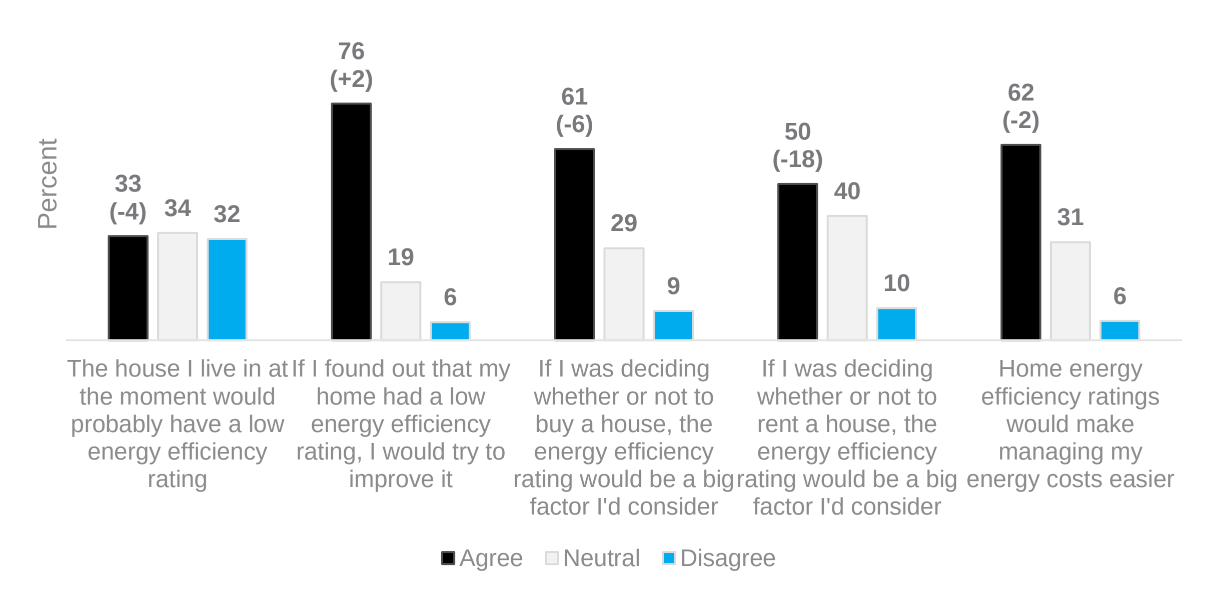
Base: Consumers in WA (n=309)

Housing energy efficiency

The importance of energy efficiency ratings to West Australian renters when deciding whether to rent a house has fallen compared to last year.

- Only half of renters say that the energy efficiency rating would be a big factor they would consider when renting a house, down 18% to 50%.
- The importance of energy efficiency ratings when deciding to buy a house has also fallen to 61% (down 6%).
- 76% of homeowners agree that they would try to improve their home's energy efficiency rating if they found out it had a low rating.
- 62% say a home energy efficiency rating would make managing their energy costs easier.
- 33% agree that the home they live in at the moment would probably have a low energy efficiency rating.

Do you agree or disagree with the following? (%)



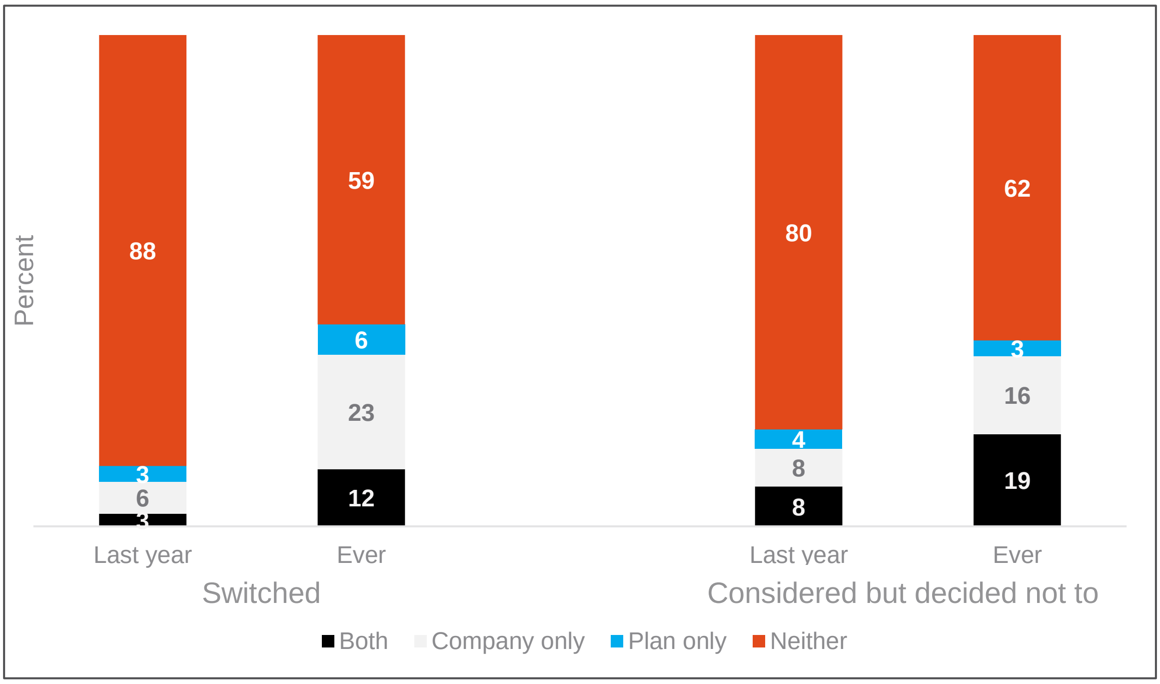
Base for 'current house having a low energy rating', 'consider energy rating when purchasing a home' and 'home energy ratings would make managing my energy costs easier': Consumers in WA (n=309)
Base for 'I would try to improve my home energy efficiency': Home-owners in WA (n=226)
Base for 'consider energy rating when renting': Renters in WA (n=78)

Switching behaviour

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

- 12% say they have switched energy companies and/or plans in the past year.
- 59% say they have never switched energy companies or plans.
- 20% say they considered switching energy companies or plans in the past year but decided not to.

Which of the following have you done? (%)



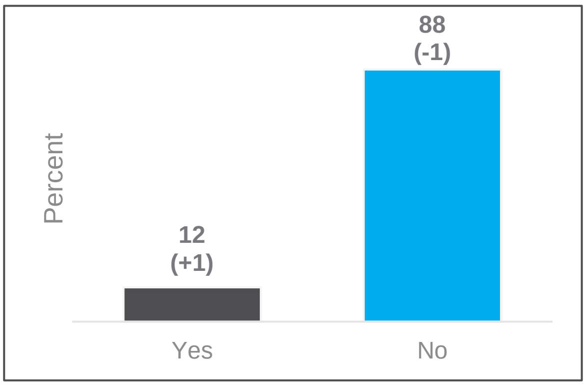
Base: Consumers in WA (n=309)

Reasons for considering switching

Being approached by a competitor is the principal factor for West Australian consumers when considering switching energy companies.

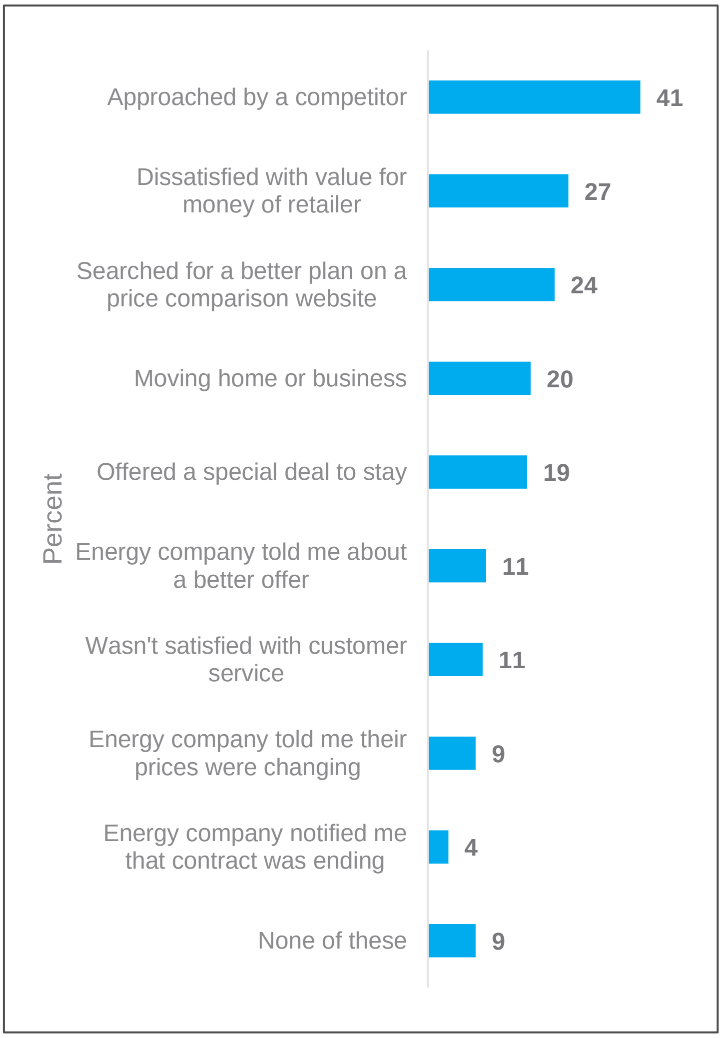
- 41% of those who have looked at switching say they were approached by a competitor.
- 27% say they were dissatisfied with the value for money of their retailer.
- 12% plan to switch energy companies or plans in the next 12 months.

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



Base: Consumers in WA (n=309)

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



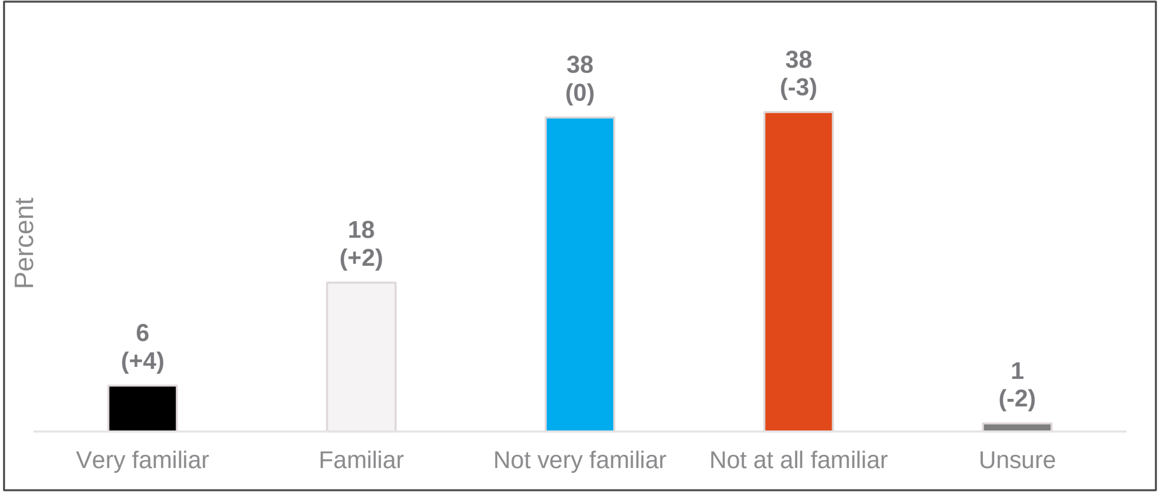
Base: Consumers in WA who have switched or looked at switching in the past (n=152)

Awareness of the Energy Ombudsman

A quarter of household consumers in Western Australia say they are familiar with the Energy Ombudsman.

- 18% of household consumers in Western Australia say they are familiar with the Energy Ombudsman and 6% very familiar
- Most are still not very familiar (38%) or not at all familiar (38%) with the Ombudsman.

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



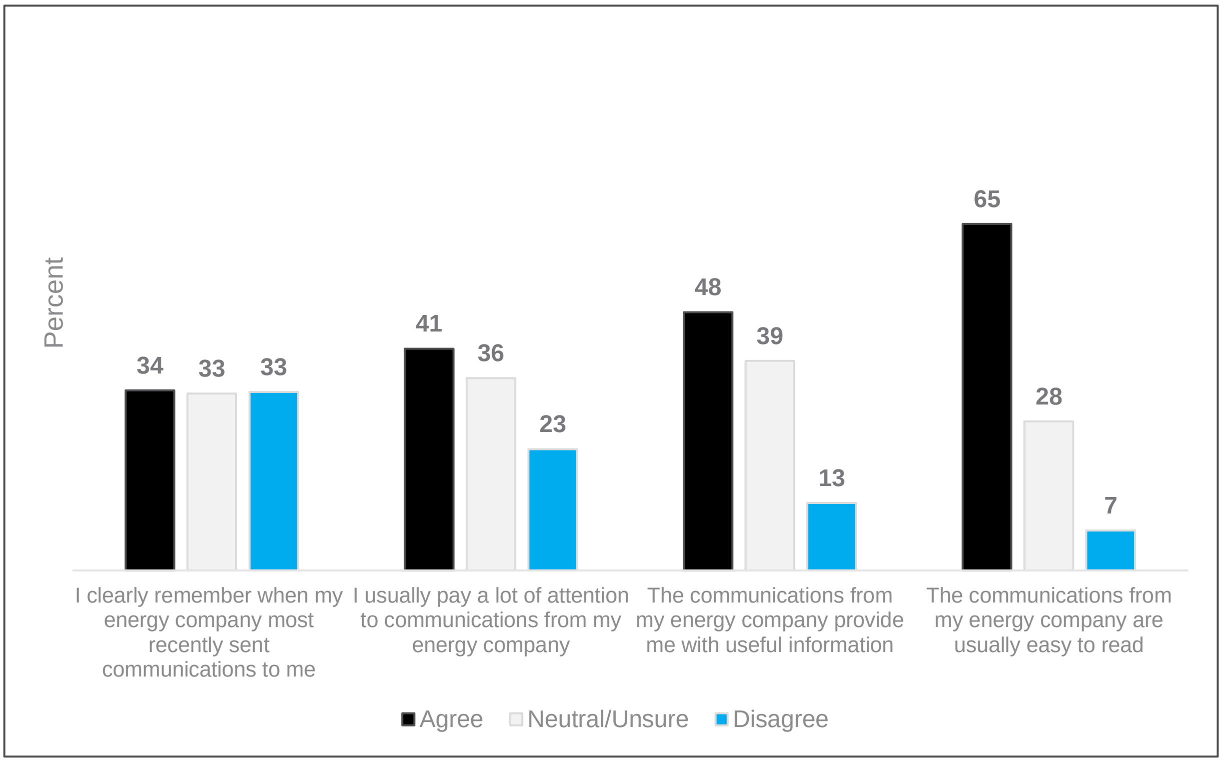
Base: Consumers in WA (n=309)

Communications from energy providers

Only about a third of West Australian consumers say they clearly recall when they most recently received communications from their energy company – the lowest recall in Australia.

- Only 34% agree that they clearly remember when they most recently received communication from their energy company.
- 65% of Western Australians agree that communications from their energy company are easy to read.
- Less than half (48%) agree that the communications from their energy company provide useful information.
- 41% agree they pay a lot of attention to communications from their energy company.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



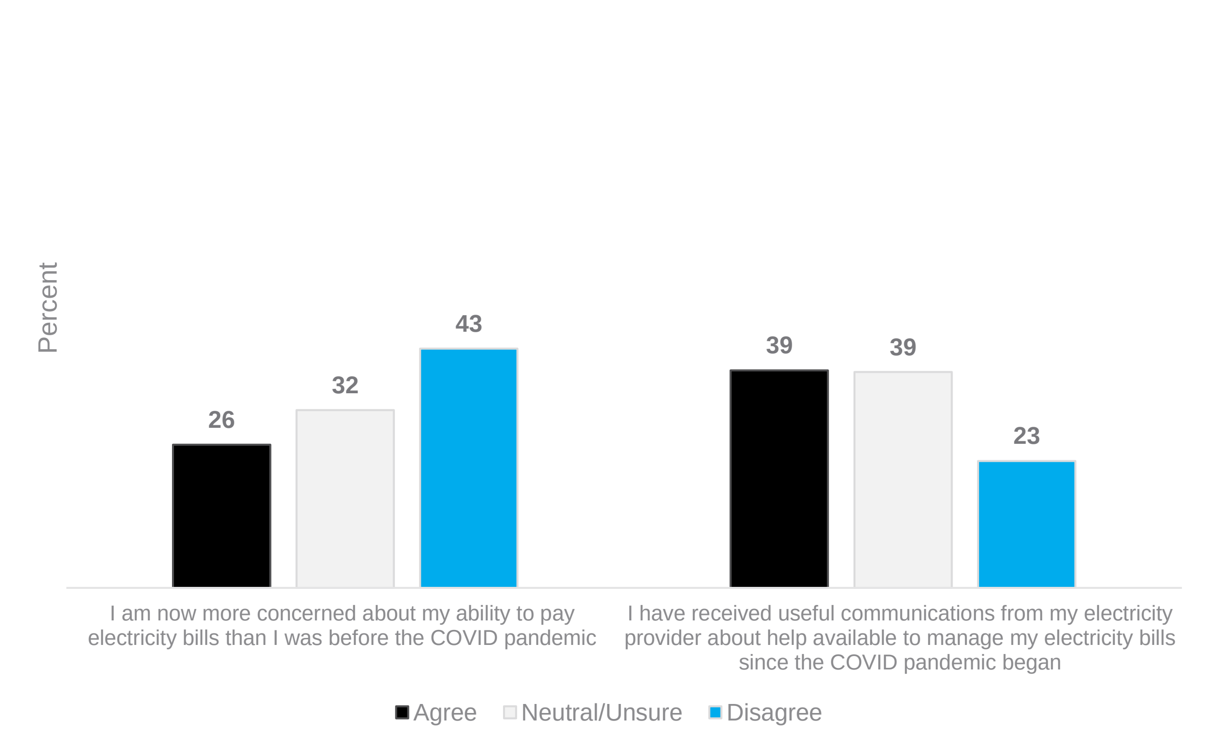
Base: Consumers in WA (n=309)

Effects of COVID-19

A quarter of West Australian consumers are more concerned that they my be unable to pay bills than before the pandemic.

- 26% agree they are now more concerned about their ability to pay electricity bills than they were before the pandemic, and 39% agree they have received useful communications from their electricity provider about help available to manage their bills since the pandemic began.

How strongly do you agree or disagree with the following statements about communication from your energy company? (%)



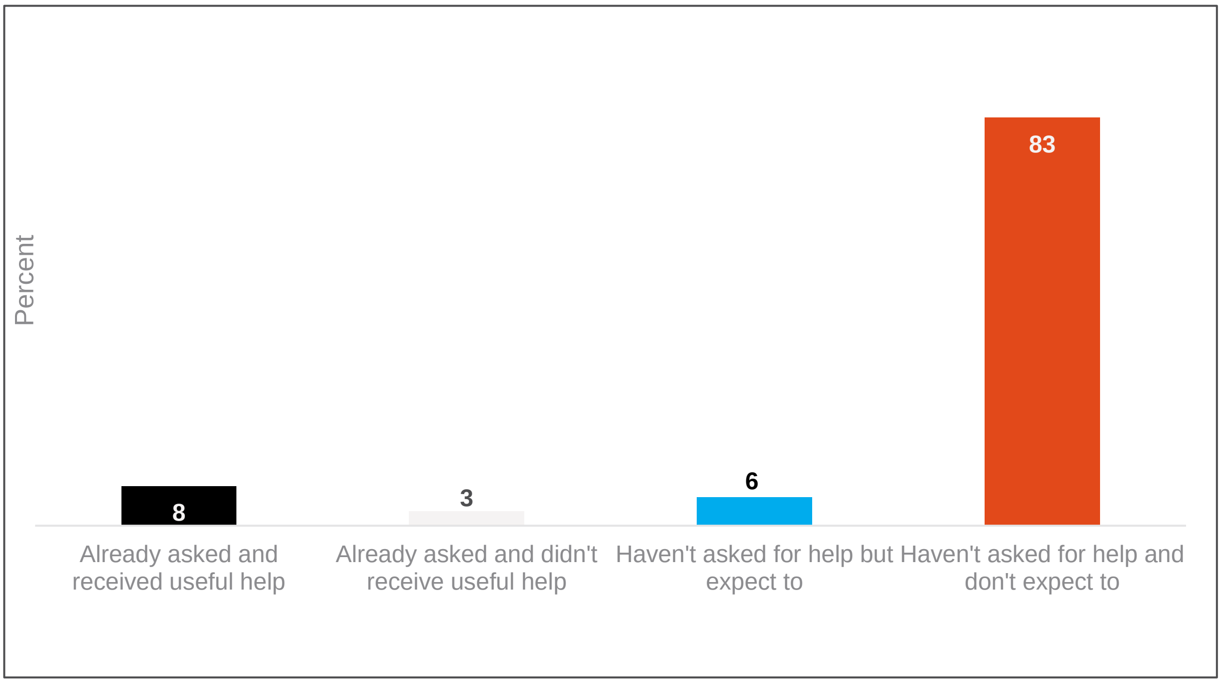
Base: Consumers in WA (n=309)

Asking for help from electricity provider

About 1 in 6 West Australians have sought help from their energy company since the pandemic began or expect to do so in the future.

- Of the 11% of households who have already asked for help from their electricity provider, most have received useful assistance (8%). 3% did not find the help useful.
- 6% of West Australian households have not yet required assistance but expect to in the future.

Which of the following applies most to you since the COVID-19 outbreak began? (%)



Base: Consumers in WA (n=309)

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Energy Consumers Australia

Energy Consumer Sentiment Survey

December 2020

QUESTIONNAIRE

Appendix A: Survey

SECTION 1: SCREENER

ASK ALL
S1a Which of the following best describes your employment status?

COMPULSORY. SINGLE RESPONSE

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 **[TERMINATE]**

ASK ALL
S1 Which of the following best describes you?

COMPULSORY. SINGLE RESPONSE

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

TERMINATE IF S1a=4,5,6 or 7 AND S1=3 (Participant is home duties/retired/unemployed or a student AND has no role in household energy decision making)
AFTER REACHING N=500 FOR BUSINESS QUOTA, TERMINATE IF S1a=1,2,3 AND S1=3 (Participant is employed (Self/Full-time/Part-time) AND has no role in household energy decisions)

ASK IF S1a=1,2,3 (Participate is employed)

SKIP S2 IF BUSINESS QUOTA REACHES N=500

S2 Which of the following best describes you?

COMPULSORY. SINGLE RESPONSE

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

TERMINATE IF S1=3 AND S2=3 (Participant has no role in household or business energy decisions)

ASK ALL
S3 Are you…?

COMPULSORY. SINGLE RESPONSE

1. Male
2. Female

ASK IF S1=1,2 (Main/joint energy decision maker in household)

S4 How old are you?

COMPULSORY. SINGLE RESPONSE

1. Under 18 **[TERMINATE]**
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

TERMINATE IF S4=1 (Participant is under 18)

ASK ALL
S5a What is your household's postcode?

COMPULSORY. OPEN-ENDED RESPONSE. LIMIT TO VALID RANGES

dS5/Location/Region. Hidden questions to record the counts per state for Location quota purpose

ASK ONLY IF S2=1,2 (Participant has role in business energy decisions)

SKIP S6 IF BUSINESS QUOTA REACHES N=500

S6 How many people are employed in your business?

COMPULSORY. SINGLE RESPONSE

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

TERMINATE IF S1a=1,2,3 AND S1=3 AND S6=4 (Participant is employed, has no role in household energy decisions and has a role in business energy decisions for a company with over 200 employees)

HIDDEN QUESTION

dTYPE=1 IF S1a=4,5,6,7 AND S1=1,2 (Participant is not employed and has role in household energy decisions)

dTYPE=1 IF S1a=1,2,3 AND S1=1,2 AND S2=3(Participant is employed, has a role in household energy decisions and has no role in business energy decisions)

dTYPE=1 IF S1a=1,2,3 AND S1=1,2 AND S6=4 (Participant is employed, has a role in household energy decisions and has a role in business energy decisions for a company with more than 200 employees)

dTYPE=2 IF S1a=1,2,3 AND S1=1,2 AND S6=1,2,3 (Participant has role in household and business energy decisions for company with <200 employees) (FILL QUOTA TO N=500, THEN RECYCLE TO CONSUMER SAMPLE)

dTYPE=2 IF S1a=1,2,3 AND S1=3 AND S6=1,2,3 (Participant has role in business energy decisions for company with <200 employees, but no role in household energy decisions) (FILL QUOTA TO N=500, THEN TERMINATE)

dType Record a respondent belongs to Business or consumer sample

COMPULSORY. SINGLE RESPONSE

1. Consumer
2. Business **(FILL QUOTA TO N=500)**

[END OF SCREENER]

SECTION 2: CURRENT USAGE

ASK IF dTYPE=2 (Business sample)

U1 Does your business operate primarily from:

COMPULSORY. SINGLE RESPONSE

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 AND S1a==1,2, or 3 (Consumer sample and employed)

U8 From which of the following locations are you primarily working at the minute?

COMPULSORY. SINGLE RESPONSE

1. Your home
2. Your employer's place of business
3. Mobile locations (e.g. tradespeople working at other people's homes)
4. Other

ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample and working from home/Mobile location)

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

1. Yes
2. No

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE OPTIONS 1-13 AND 14-15

SEPARATELY

1. Natural gas (mains gas)
2. Liquified Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
5. A swimming pool or spa pool
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)
8. A ducted evaporative cooling system
9. Gas central heating
10. A portable electric or gas heater
11. An electric vehicle
12. Solar hot water
13. A dishwasher

ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample working from home/Mobile location)

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

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

COMPULSORY. CAROUSEL LAYOUT. RANDOMISE ROW OPTIONS

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

ASK IF U2/7=1 AND U2/9=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)

U6 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?

COMPULSORY. SINGLE RESPONSE

1. Air conditioning (for cooling and heating)
2. Gas central heating
3. Use both equally

ASK ONLY IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)

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

1. Yes
2. No

COMPULSORY. CAROUSEL LAYOUT. RANDOMISE OPTIONS

1. Natural gas (mains gas)
2. Liquified Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated in your home – especially solar electricity)
5.
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)
8.
9. Gas central heating
19. 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 (Business sample and working from fixed location)

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?

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

COMPULSORY. CAROUSEL LAYOUT. RANDOMISE ROW OPTIONS

1. A digital meter for your electricity supply, also

known as a smart meter

2. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
3. An energy management system (a product that monitors, controls or analyses energy use in your business premises)

ASK IF U3/6=1 AND U3/8=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)

U7 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 place of business?

COMPULSORY. SINGLE RESPONSE

1. Air conditioning (for cooling and heating)
2. Gas central heating
3. Use both equally

SECTION 3: ELECTRICITY

SHOW IF dTYPE=2 (Business sample)

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.

COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very poor", "10 - Excellent". NUMBER ALL OTHER OPTIONS

ASK ALL

E2 How satisfied are you with the following?

COMPULSORY. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied". RANDOMISE ORDER

1. The overall quality of customer service provided by your electricity company in the past 6 months
2. The billing and account options (such as the option of monthly billing, online accounts etc.) currently available to you from your electricity supplier
3. The number of times you've had loss of power, blackout or other faults with your electricity supply in the past 6 months

ASK IF E2/3≠10 (Participant did not rate the number of times they've had a loss of power as Very satisfied)

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**?

COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied". INCLUDE POINT "I haven't had any faults in past 6 months". NUMBER ALL OTHER POINTS

SECTION 4: GAS

ONLY ASK THIS SECTION IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business). ELSE SKIP TO SECTION 5

SHOW IF dTYPE=2 (Business sample)

INFO2

For the following questions please respond in relation to your <u>**business**</u> electricity and gas accounts.

ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business)

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

COMPULSORY. SINGLE RESPONSE

1. Yes, my gas and electricity accounts are with the same company
2. No, I have a different company for my gas

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account
97. Don't know

ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business)

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?

COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very poor", "10 - Excellent". NUMBER ALL OTHER OPTIONS

ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 (Participant has natural gas, LPG or gas central heating at their household or business)

G3 How satisfied are you with the following?

COMPULSORY. SINGLE CHOICE PER ROW. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied". RANDOMISE ORDER

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

SECTION 5: OVERVIEW

SHOW IF dTYPE=2 (Business sample)

INFO2

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

ASK ALL

O1 How satisfied are you with the following?

COMPULSORY. SINGLE CHOICE PER ROW. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very dissatisfied", "10 - Very satisfied"

1. The provision of your electricity and gas services overall over the last 6 months
2. 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)

SHOW TO ALL

INFO3

The following question is about some services not related to your electricity or gas.

SHOW IF dTYPE=2 (Business sample)

INFO4

Again, please respond in relation to your **business** accounts.

ASK ALL

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?

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Very poor", "10 - Excellent". NUMBER ALL OTHER POINTS. RANDOMISE ORDER. INCLUDE "Not applicable" AFTER 10.

1. Your internet service
2. Your mobile phone service
3. Your insurance services
4. Your banking services
5. Your water services

ASK IF dTYPE=2 (Business sample)

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

COMPULSORY. SINGLE RESPONSE

1. One of your biggest overheads
2. Substantial, but not one of your biggest overheads
3. A minor expense in the scheme of things

SECTION 6: ACTIVITY

ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample and working from home/Mobile location)
ONLY SHOW PRODUCT OPTIONS WHEN U2=2 OR U4=3 (Participant does not have the product)

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

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

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER

1. Natural gas (mains gas)
2.
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 grid or electricity generated in your home – especially solar electricity)
5. A swimming pool or spa pool
6. Air conditioning (for cooling only)
7. Air conditioning (for cooling and heating)
8. A ducted evaporative cooling system
9. Gas central heating
10. A portable electric or gas heater
11. An electric vehicle
12. Solar hot water
13. A dishwasher
14. A digital meter for your electricity supply, also known as a smart meter
15. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
16. A home energy management system (a product that monitors, controls or analyses energy use in your home)
17. Appliances that are more energy efficient

ASK IF dTYPE=2
ASK IF U2=2 OR U4=3 OR U3=2 OR U5=3 (Participant does not have the product)

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

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 this2

COMPULSORY. SINGLE RESPONSE GRID

1. Natural gas (mains gas)
2.
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 grid or electricity generated in your home – especially solar electricity)

11. Electric vehicles
18. Appliances, equipment or machinery that are more energy efficient

ASK ALL
ONLY SHOW PRODUCT OPTIONS WHEN A1=1,2 OR A2=1,2 (Participant is intending to, or considering purchasing the product)

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

1. To save money
2. **[DO NOT SHOW FOR CODE 11]** 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

COMPULSORY. MULTIPLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE LIST

1.
2.
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 on site – especially solar electricity

11. An electric vehicle
12. Solar hot water
13.
14. A digital meter for your electricity supply, also known as a smart meter
15. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
16. An energy management system (a product that

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monitors, controls or analyses energy use in your home or business)

17. [SHOW IF ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3)] Appliances that are more energy efficient
18. [SHOW IF dTYPE=2 AND U1=2] Appliances or machinery that are more energy efficient

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?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=1 OR (dTYPE=2 AND U1=1,3) (Consumer sample OR Business sample and working from home/Mobile location)
ASK IF U2_7=1 AND U2_9=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)

A10a 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?

COMPULSORY. SINGLE RESPONSE}

1. I am considering changing the way I heat my home, so I use air conditioning for heating more and gas central heating less
2. I am considering changing the way I heat my home, so I use air conditioning for heating less and gas central heating more
3. I am not considering changing the way I heat my home

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF dTYPE=2 AND U3/6=1 AND U3/8=1 (Participant has both Air conditioning (for cooling and heating) and Gas central heating)

A10b 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?

COMPULSORY. SINGLE RESPONSE

1. I am considering changing the way I heat my business, so I use air conditioning for heating more and gas central heating less
2. I am considering changing the way I heat my business, so I use air conditioning for heating less and gas central heating more
3. I am not considering changing the way I heat my business

ASK ALL

A4 Which of the following do you currently do or plan to do?

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

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER

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

ASK ALL

A5a Which of the following have you done in the last year?

1. Yes
2. No

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER

1. Switched energy companies
2. Switched energy plans with the same company
3. Looked at switching energy companies, but decided not to switch at that time
4. Looked at switching energy plans with the same company, but decided not to switch at that time

ASK ALL
ONLY SHOW OPTIONS WHEN ALL A5a=2 (Participant did not do any of this in past year)

A5b Which of the following have you EVER done?

1. Yes
2. No

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ORDER

1. Switched energy companies
2. Switched energy plans with the same company
3. Looked at switching energy companies, but decided not to switch at that time
4. Looked at switching energy plans with the same company, but decided not to switch at that time

ASK IF A5a/1=1 OR A5a/3=1 OR A5b/1=1 OR A5b/3=1 (Participant switched, or was looking to switch energy companies)

A6 Thinking about the last time you looked at switching energy companies, which of the following applied to you?

COMPULSORY. MULTIPLE RESPONSE. RANDOMISE 1-6 AND 8-10. OPTION 7 STAYS AT BOTTOM OF LIST AND IS EXCLUSIVE

1. I was moving home or business location
2. I wasn't satisfied with the value for money of my old company
3. I was offered a special deal by my current company to get me to stay
4. I was approached by a competitor
5. I searched for a better plan on an independent price comparison website
6. I wasn't satisfied with the customer service of my old company
8. My energy company notified me that a contract period was ending
9. My energy company told me that their prices were changing
10. My energy company told me about a better offer
7. None of these

ASK IF A5a/3=1 (Participant looked at switching energy companies, but decided not to switch at that time)

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?

COMPULSORY. OPEN-ENDED VERBATIM BOX

ASK ALL

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

COMPULSORY. SINGLE RESPONSE

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

ASK ALL

N1 How strongly do you agree or disagree with the following statements about communication from your energy company?

Communication includes information about the plan you are on, changes in the price you pay or advice about a different offer, ***but*** *excludes marketing or notifications about outages*

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree
6. Unsure

COMPULSORY. CAROUSEL LAYOUT. RANDOMISE ROW OPTIONS

1. I clearly remember when my energy company most recently sent communications to me
2. I usually pay a lot of attention to communications from my energy company
3. The communications from my energy company provide me with useful information
4. The communications from my energy company are usually easy to read
5. I am now more concerned about my ability to pay electricity bills than I was before the COVID pandemic
6. I have received useful communications from my electricity provider about help available to help me manage my electricity bills since the COVID pandemic began

ASK ALL

N2 Which of the following applies most to you since the Covid-19 outbreak began?

COMPULSORY. SINGLE RESPONSE

1. I have asked my electricity provider for help with my bills and received help that was useful
2. I have asked my electricity provider for help with my bills but did not receive help that was useful
3. I have not asked my electricity provider for help but expect to do so in the near future
4. I have not asked my electricity provider for help and do not expect to do so in the near future

SECTION 7: CONFIDENCE

SHOW IF dTYPE=2 (Business sample)

INFO2

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…?

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Not at all confident", "10 - Very confident"

1. Your ability to make choices about energy products and services, such as which plan or supplier to choose
2. 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
3. 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.
4. Your ability to get a problem with your energy services resolved through your energy company or a third party

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.

COMPULSORY. SINGLE RESPONSE. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Not at all confident", "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…?

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. 11-POINT SCALE. LABEL END POINTS ONLY "0 - Not at all confident", "10 - Very confident". NUMBER ALL OTHER POINTS. RANDOMISE ORDER

1. Value for money
2. Reliability (blackouts and restoration of supply) of power supply
3. Your energy company's customer service levels
4. Technological advances to manage your energy supply and costs

ASK ALL

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

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

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ROWS

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

ASK IF dTYPE=1 (Consumer sample)

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

COMPULSORY. SINGLE RESPONSE

1. Live in your own home
2. Rent
98. Other

ASK IF dTYPE=1 (Consumer sample)

C8 How strongly do you support or oppose the following?

1. Strongly support
2. Somewhat support
3. Neither support nor oppose
4. Somewhat oppose
5. Strongly oppose
6. Unsure

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISE ROWS

1. Introducing a mandatory labelling scheme for all houses, where all houses would have to have a current energy efficiency rating
2. Increasing minimum standards for energy efficiency for rental properties, to ensure that they meet basic energy efficiency standards.

ASK IF dTYPE=1 (Consumer sample)

C9 As you may be aware, fuel economy labels on new vehicles include estimates of how much fuel a typical driver would use in that vehicle each year, and therefore the approximate annual cost of fuel for that vehicle.

The same could be introduced for houses (including apartments & units), where every house could be given a label showing how much energy the home would be expected to use in a year, and therefore an estimated energy costs.

How strongly do you agree or disagree with the following…?

1. Strongly agree
2. Somewhat agree
3. Neither agree nor disagree
4. Somewhat disagree
5. Strongly disagree

COMPULSORY. SINGLE RESPONSE GRID. RANDOMISE ROWS

1. The house I live in at the moment would probably have a low energy efficiency rating
2. **[ASK IF D13=1 (Participants who live in their own home)]** If I found out that my home had a low energy efficiency rating, I would try to improve it
3. If I was deciding whether or not to buy a house, the energy efficiency rating would be a big factor I'd consider
4. **[ASK IF D13=2 (Participants who are renting)]** If I was deciding whether or not to rent a house, the energy efficiency rating would be a big factor I'd consider
5. Home energy efficiency ratings would make managing my energy costs easier

ASK ALL

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?

COMPULSORY. OPEN-ENDED VERBATIM BOX

ASK ALL. NO BACK BUTTON OPTION AT THIS QUESTION

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

COMPULSORY. SINGLE RESPONSE

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?

COMPULSORY. SINGLE RESPONSE

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 (Consumer sample) ASK D1 to D18

IF dTYPE=2 (Business sample) ASK B1 to B4

IF U2/1=1 OR U2/9=1 (Participant has natural gas or gas central heating)
D1 Do you get separate bills for electricity and gas?

COMPULSORY. SINGLE RESPONSE

1. Yes
2. No

IF (U2/1=2 AND U2/9=2) OR D1=1 (Participant does not have natural gas and gas central heating, or they have natural gas or gas central heating and get separate bills for electricity and gas)
D2 Approximately how much was your most recent bill for electricity?

COMPULSORY. SINGLE RESPONSE

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. $1,000 or more

97. Don't know
96. Prefer not to say

IF (U2/1=2 AND U2/9=2) OR D1=1 (Participant does not have natural gas and gas central heating, or they have natural gas or gas central heating and get separate bills for electricity and gas)
D3 How many months did that bill cover?

COMPULSORY. SINGLE RESPONSE

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

IF D1=1 (Participant has natural gas or gas central heating and gets separate bills for electricity and gas)
D4 Approximately how much was your most recent bill for gas?

COMPULSORY. SINGLE RESPONSE

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. $1,000 or more

97. Don't know
96. Prefer not to say

IF D1=1 (Participant has natural gas or gas central heating and gets separate bills for electricity and gas)
D5 How many months did that bill cover?

COMPULSORY. SINGLE RESPONSE

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

IF D1=2 (Participant has natural gas or gas central heating and does not get separate bills for electricity and gas)
D6 Approximately how much was your most recent bill for electricity and gas?

COMPULSORY. SINGLE RESPONSE

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. $1,000 or more

97. Don't know

96. Prefer not to say

IF D1=2 (Participant has natural gas or gas central heating and does not get separate bills for electricity and gas)

D7 How many months did that bill cover?

COMPULSORY. SINGLE RESPONSE

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

ASK ALL FOR DTYPE=1 (Consumer sample)

D8 Which if any of the following apply to you?

1. Yes
2. No

COMPULSORY. SINGLE RESPONSE. CAROUSEL LAYOUT. RANDOMISED.

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

ASK IF DTYPE=1 (Consumer sample)

D19a 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.

Would a **5% increase** in the cost of electricity make any difference to your electricity usage?

COMPULSORY. SINGLE RESPONSE

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

ASK IF D19a=1 OR D19a=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)

D19b And would a **10% increase** in the cost of electricity make any difference to your electricity usage?

COMPULSORY. SINGLE RESPONSE

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

ASK IF D19b=1 OR D19b=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)

D19c And would a **15% increase** in the cost of electricity make any difference to your electricity usage?

COMPULSORY. SINGLE RESPONSE

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

ASK IF D19c=1 OR D19c=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)

D19d And would a **20% increase** in the cost of electricity make any difference to your electricity usage?

COMPULSORY. SINGLE RESPONSE

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

ASK IF D19d=1 OR D19d=2 (Previous increase wouldn't make difference or consider making difference to electricity usage)

D19e And would a **25% increase** in the cost of electricity make any difference to your electricity usage?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=1 (Consumer sample)

D9 What is your annual household income?

(This is the total of all wages/salaries, government benefits, pensions, allowances and other income that your household usually receives. GROSS – before tax and superannuation deductions)

COMPULSORY. SINGLE RESPONSE

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 IF dTYPE=1 (Consumer sample)
D10 What is the highest level of education you have completed?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=1 (Consumer sample)
D11 Do you have dependent children under the age of 18?

COMPULSORY. SINGLE RESPONSE

1. Yes
2. No

ASK IF dTYPE=1 (Consumer sample)
D12 How many people live in your household?

Please type a number into the box below.

COMPULSORY. NUMERIC ENTRY BOX. VALID RESPONSES 1 TO 19

ASK IF dTYPE=1 (Consumer sample)
D14 Which of the following best describes where you live?

COMPULSORY. SINGLE RESPONSE

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 IF dTYPE=1 (Consumer sample)
D14A How long have you lived there?

COMPULSORY. SINGLE RESPONSE

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

98. Unsure

ASK IF dTYPE=1 (Consumer sample)
D15 Which decade was your home built in?

COMPULSORY. SINGLE RESPONSE

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

98. Unsure

ASK IF dTYPE=1 (Consumer sample)
D16 Which of the following best describes how you feel about your current financial situation?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=1 (Consumer sample)
D17 Which, if any, of the following apply to you?

1. Yes
2. No

97. Don't know
96. I'd rather not say

COMPULSORY. SINGLE RESPONSE GRID. RANDOMISE ROWS

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

Essential. RESEARCH

ASK IF dTYPE=1 (Consumer sample)

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

COMPULSORY. SINGLE RESPONSE

1. No, English only
2. Yes
9. Prefer not to say

SECTION 9: DEMOGRAPHICS – BUSINESS CONSUMERS

IF dTYPE=1 (Consumer sample) ASK D1 to D18

IF dTYPE=2 (Business sample) ASK B1 to B4

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF U3/1=1 OR U3/9=1 (Participant uses natural gas or has gas central heating in business)

B1 Do you get separate bills for electricity and gas?

COMPULSORY. SINGLE RESPONSE

1. Yes
2. No

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF (U3/1=2 AND U3/9=2) OR B1=1 (Participant does not use natural gas and gas central heating in business or they have natural gas or gas central heating and get separate bills for electricity and gas)

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

COMPULSORY. SINGLE RESPONSE

1. Less than $1,000
2. $1,000 to $1,499
3. $1,500 to $1,999
4. $2,000 to $2,999
5. $3,000 to $3,999
6. $4,000 to $4,999
7. $7,000 to $7,499
8. $7,500 to $9,999
9. $10,000 or more

97. Don’t know
96. Prefer not to say

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF (U3/1=2 AND U3/9=2) OR B1=1 (Participant does not use natural gas and gas central heating in business or they have natural gas or gas central heating and get separate bills for electricity and gas)

B3 How many months did that bill cover?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF B1=1 (Participant has natural gas or gas central heating and gets separate bills for electricity and gas)

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

COMPULSORY. SINGLE RESPONSE

1. Less than $1,000
2. $1,000 to $1,499
3. $1,500 to $1,999
4. $2,000 to $2,999
5. $3,000 to $3,999
6. $4,000 to $4,999
7. $7,000 to $7,499
8. $7,500 to $9,999
9. $10,000 or more

97. Don’t know
96. Prefer not to say

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF B1=1 (Participant has natural gas or gas central heating and gets separate bills for electricity and gas)

B5 How many months did that bill cover?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)

ASK IF B1=2 (Participant has natural gas or gas central heating but does not get separate bills for electricity and gas)
B6 Approximately how much was your most recent bill for electricity and gas?

COMPULSORY. SINGLE RESPONSE

1. Less than $1,000
2. $1,000 to $1,499
3. $1,500 to $1,999
4. $2,000 to $2,999
5. $3,000 to $3,999
6. $4,000 to $4,999
7. $7,000 to $7,499
8. $7,500 to $9,999
9. $10,000 or more

97. Don't know
96. Prefer not to say

ASK IF dTYPE=2 AND U1=2 (Business sample and working from another fixed location)
ASK IF B1=2 (Participant has natural gas or gas central heating but does not get separate bills for electricity and gas)
B7 How many months did that bill cover?

COMPULSORY. SINGLE RESPONSE

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

ASK IF dTYPE=2 (Business sample)
B8 Which of the following categories does your business fall into?

COMPULSORY. SINGLE RESPONSE

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 (Business sample and working from fixed location)
B9 Do you own or lease the primary premises from where your business operates?

COMPULSORY. SINGLE RESPONSE

1. Lease
2. Own

98. Other

ASK IF U1=2 (Business sample and working from fixed location)
B10 Which of the following best describes your general hours of operation?

COMPULSORY. SINGLE RESPONSE

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

98. Other

ASK IF dTYPE=2 (Business sample)
B18 Do you speak a language other than English at home?

COMPULSORY. SINGLE RESPONSE

1. No, English only
2. Yes
3.
9. Prefer not to say

SECTION 10: CLOSING QUESTIONS

SHOW ALL
INFO5
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/

ASK ALL

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

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

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

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

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

NUMERIC ENTRY BOX. INCLUDE PREFER NOT TO SAY OPTION

SHOW ALL
INFO6
Note that the next question will ask about your gas bill (if you have one), so if you have to look for your electricity bill now, you might like to look for your gas bill at the same time.

PREFER NOT TO SAY LINK DIRECTS TO L3

ASK IF U2/1=1 OR U2/2=1 OR U2/9=1 OR U3/1=1 OR U3/2=1 OR U3/9=1 AND L1≠'SKIP TO END' (Participant has mains gas, LPG or gas central heating and didn't skip NMI)

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.

NUMERIC ENTRY BOX. INCLUDE SKIP TO THE END OPTION

SKIP TO THE END LINK DIRECTS TO L3

ASK ALL

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

Please type your answer into the box below

COMPULSORY. OPEN-ENDED VERBATIM BOX