

Energy Consumers
Australia
Energy Consumer
Sentiment Survey
June 2020

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Notes on methodology

This online survey was in the field from 16 March to 31 March 2020.

- Fieldwork for this wave was conducted at the tail-end of a series of bushfires throughout Queensland, New South Wales, Victoria, the Australian Capital Territory and Tasmania.
- Additionally, state and federal governments began to implement restrictions on individuals' movement outside of their home due to a world-wide pandemic of Coronavirus (COVID-19).
- These events may impact some of the results.

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 ninth 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 seventh wave, reported in June 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).

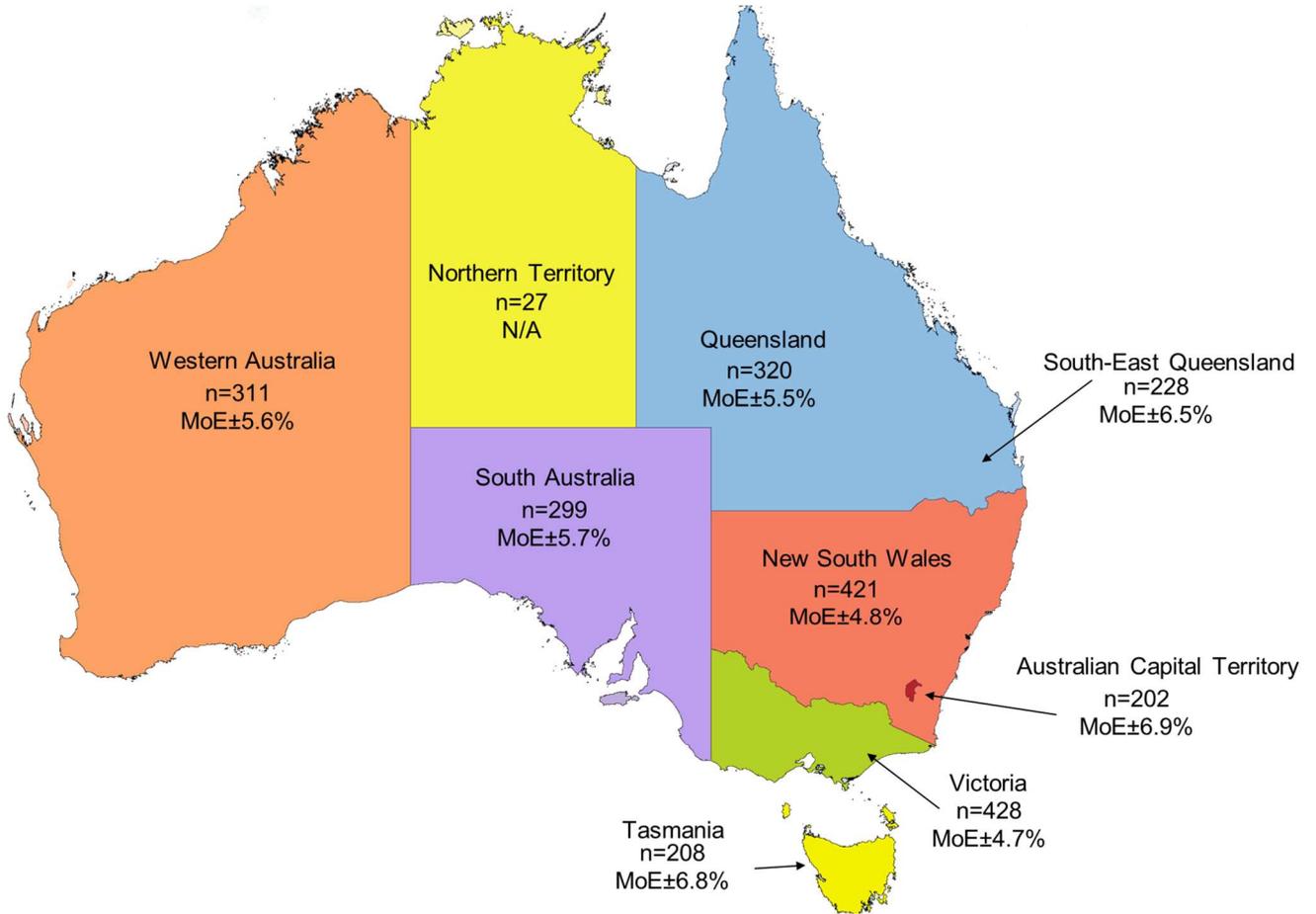
The comparison charts also often include a 'national average' for households.

- 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 June 2019 in brackets.

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

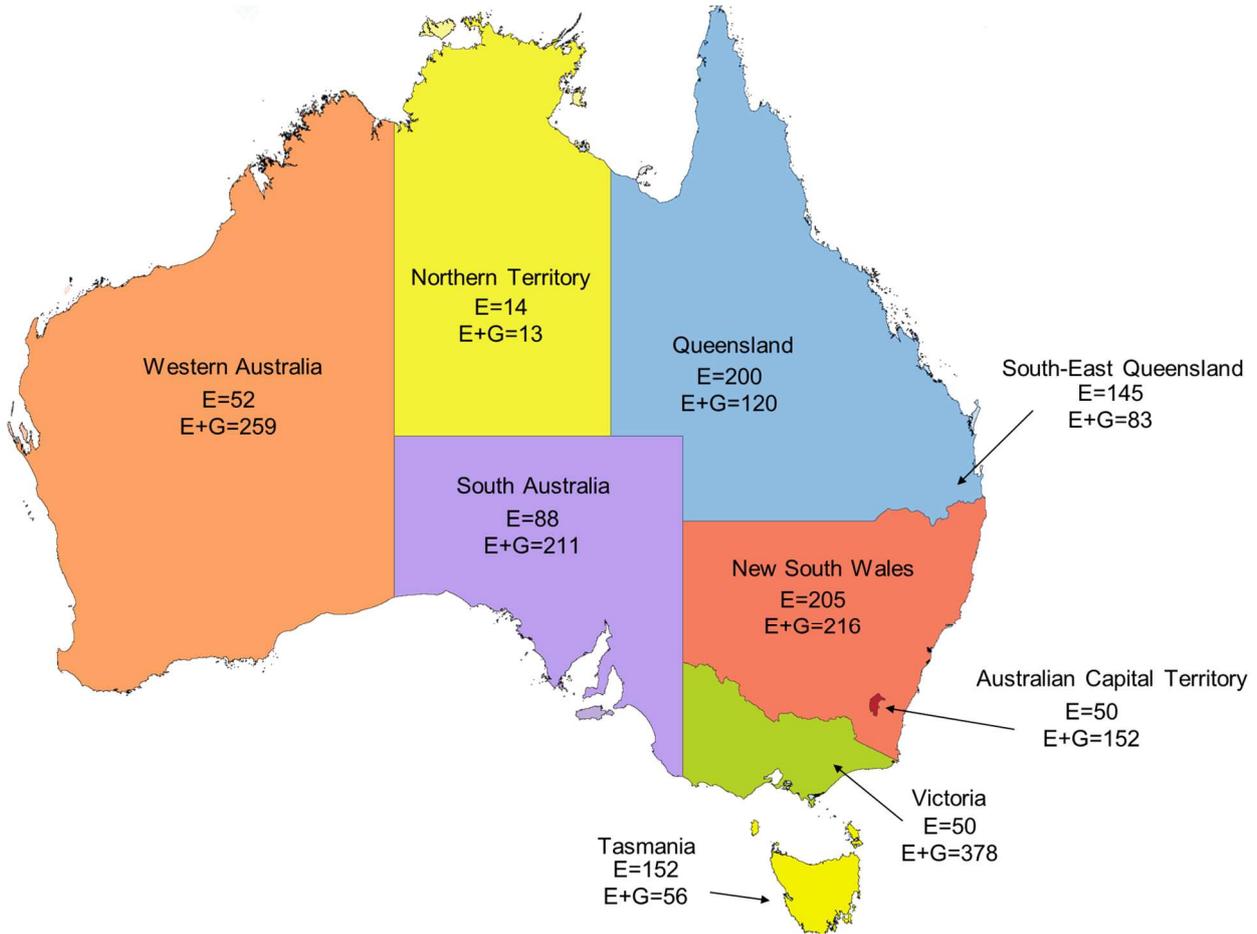
Samples by state and territory



Plus nationwide:

Businesses with less than 200 employees
N=522, MOE* = ±4.3%
(MOE = Margin of Error)
* 'All Qld' includes SEQ

Samples by energy types



KEY

E Only electricity

E+G Electricity and gas

Plus nationwide:

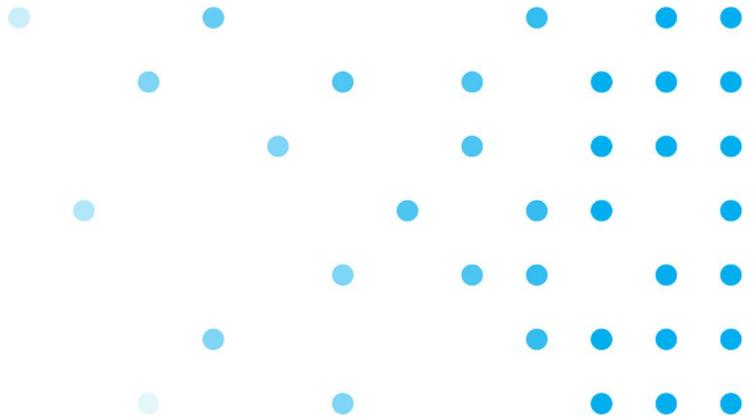
Businesses with less than 200 employees

E (N=178)

EG (N=344)

* 'All Qld' includes SEQ

Summary Findings



Summary of key findings

The report shows a continuation of the recent upward trend in consumer satisfaction with the value for money of their electricity and gas services, but energy services still trail all other comparable services in this respect.

- Compared with June 2019, satisfaction with the overall delivery of electricity and gas services is up 8% (to 77%) for household consumers and 12% (to 71%) for small business.
- Consumers' satisfaction with the value for money of their electricity service, has now improved in four of the past five surveys for both households and small businesses.
- For the first time since the survey began at least half of all consumers are satisfied with the value for money of their electricity service in every jurisdiction, and among small businesses.
- Household consumers' satisfaction with the value for money of their gas service has also increased in four of the past five surveys.

Consumers' confidence that the market is working in their interests has similarly tracked upwards, but slower and from a lower base.

- 36% of household consumers now saying they are confident the market is working in their interests (up 5%).

Looking to the future, more consumers are confident that energy market outcomes will improve than in previous surveys.

- Household energy consumers' confidence that the market will deliver better outcomes in the future increased across value for money, reliability and technological advances.
- However, consumers' confidence in future value for money remains below 50% across all markets and lags other measures of confidence in future outcomes.

While consumers' confidence in the information and tools available to make decisions about energy has increased in recent surveys, new questions asked in this survey show that a large number of consumers think there is room for improvement in the communications they receive from their energy company.

- Consumers' confidence in their ability to make choices about energy is tracking upward and has reached 64% for households and 63% for small business.

- Confidence in the availability of easily understood information has also increased – to 55% for households and 57% for small businesses.
- But most consumers could not clearly remember the latest information they received from their energy company with jurisdictional results ranging between 34% (Western Australia) and 48% (Victoria).
- The proportions of household consumers who agree that communications from their energy company provide useful information range from 47% in Tasmania and 58% in Victoria, while 59% of small business consumers agree.
- The proportions of household consumers who agree that information from energy companies is easy to understand varies from 60% (ACT and Tasmania) to 66% (Victoria), while 62% of small business consumers agree.

There is increasing support for a range of proactive initiatives such as incentives for consumers to manage their energy use and preparedness to participate in energy use reduction campaigns.

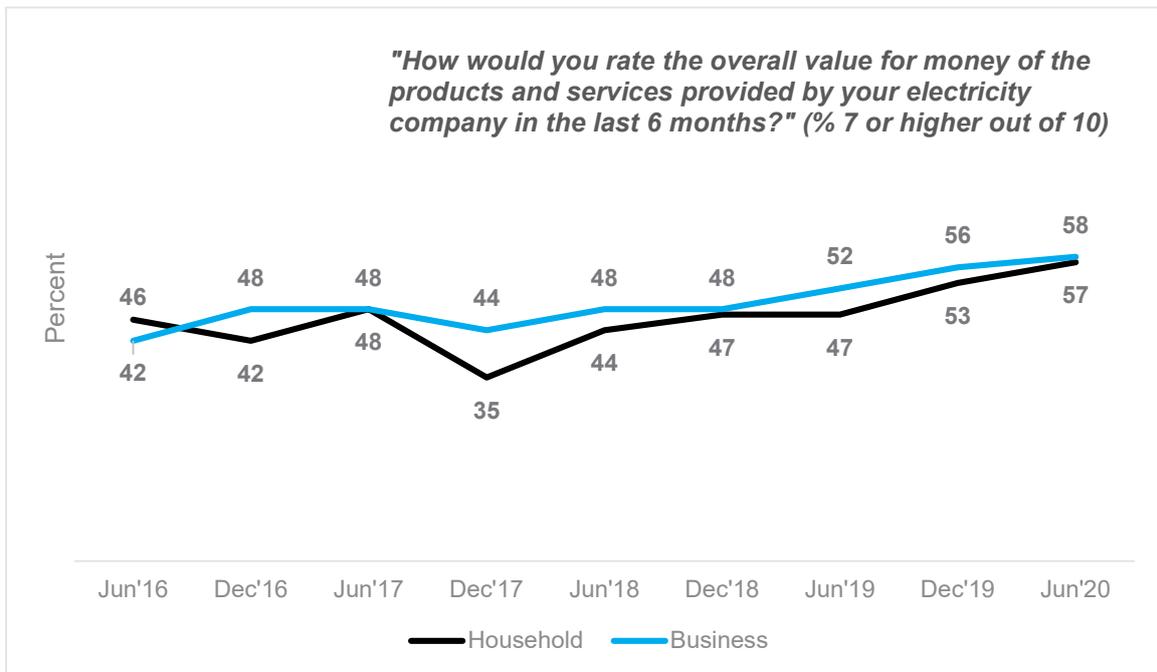
- Depending on the jurisdiction, 70-81% of household consumers would respond to a campaign to lower their energy use. That number is even higher among small businesses (82%).
- Apart from Queensland, more than half of all households support a mandatory energy efficiency labelling scheme for houses.
- More than 60% of consumers support minimum energy efficiency standards for rental properties, with less than 1 in 10 consumers opposed to the idea.

Trends

Long-term findings

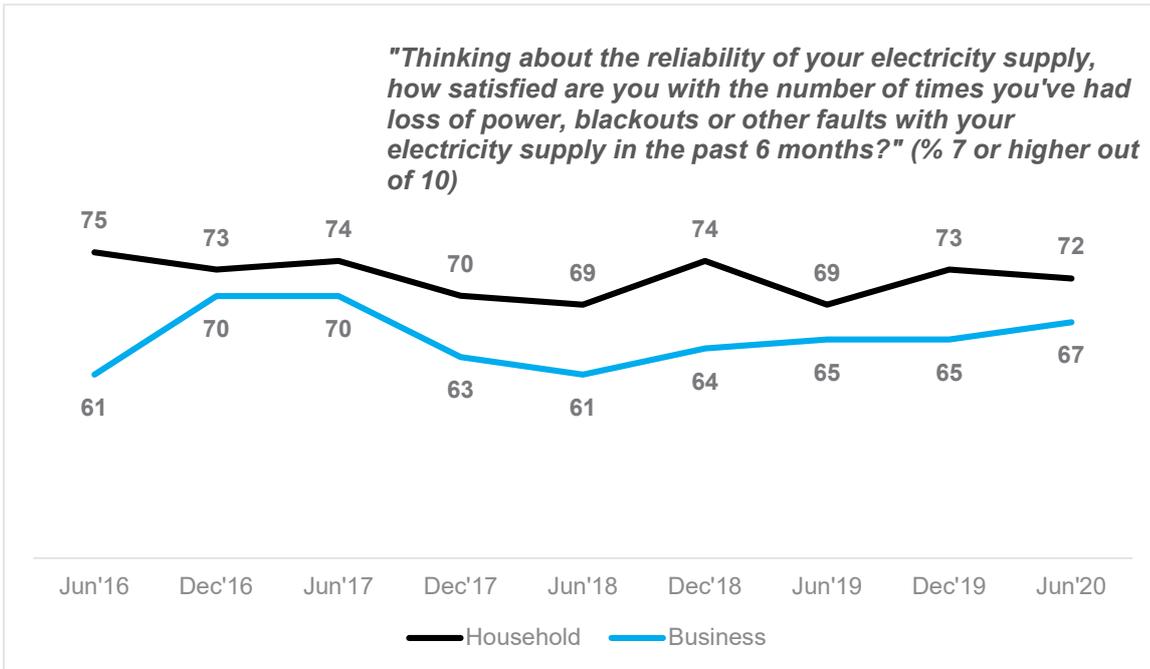
Household satisfaction with the value for money of their electricity service is up 10% (to 57%) - continuing an upward trend and reaching the highest rating since tracking started four years ago.

Overall satisfaction with value for money from electricity companies has increased for small business consumers by 6% (to 58%) since this time last year - again the highest rating since tracking started four years ago.



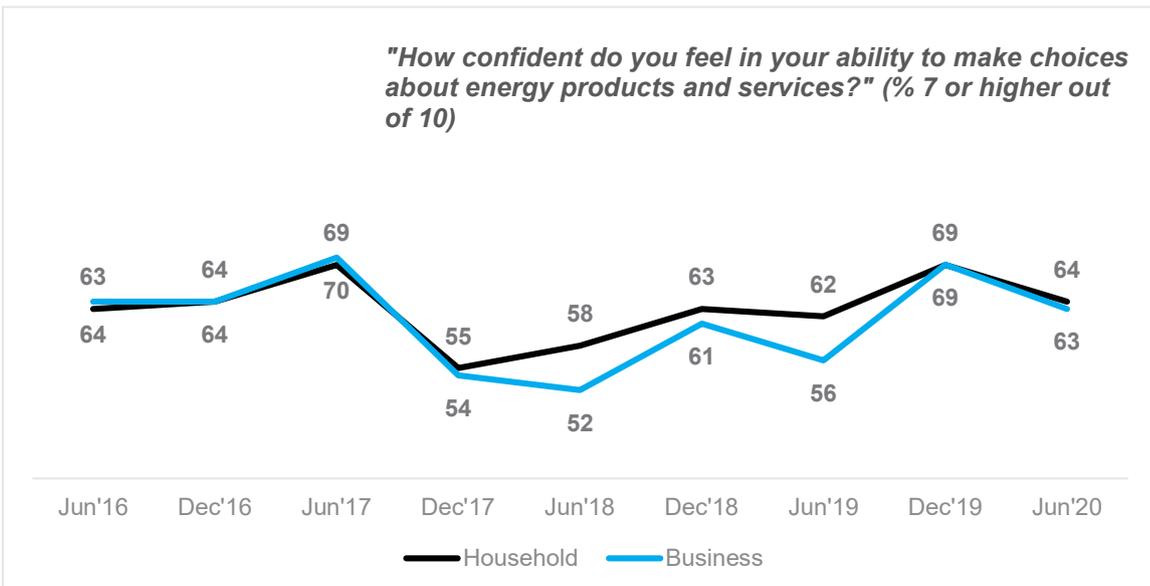
Base: All Household (n=2,216) & Business consumers (n=522)

Satisfaction with the reliability of electricity supply is steady for household consumers with 72% of satisfied with the number of times they have lost power. Comparatively 67% of small businesses are satisfied with the reliability of their electricity supply.



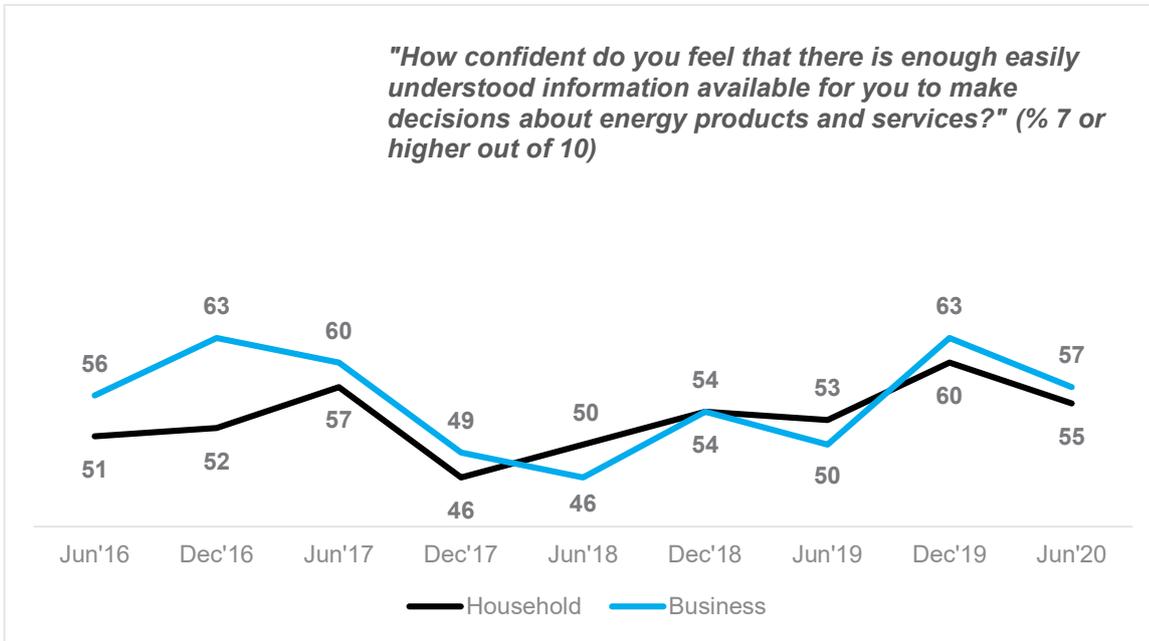
Base: All Household (n=2,216) & Business consumers (n=522)

Household consumers' confidence in their ability to make energy choices is stable at 64% and continuing a general upward trend. Small businesses' confidence on the same measure has increased to 63% (up 7%).



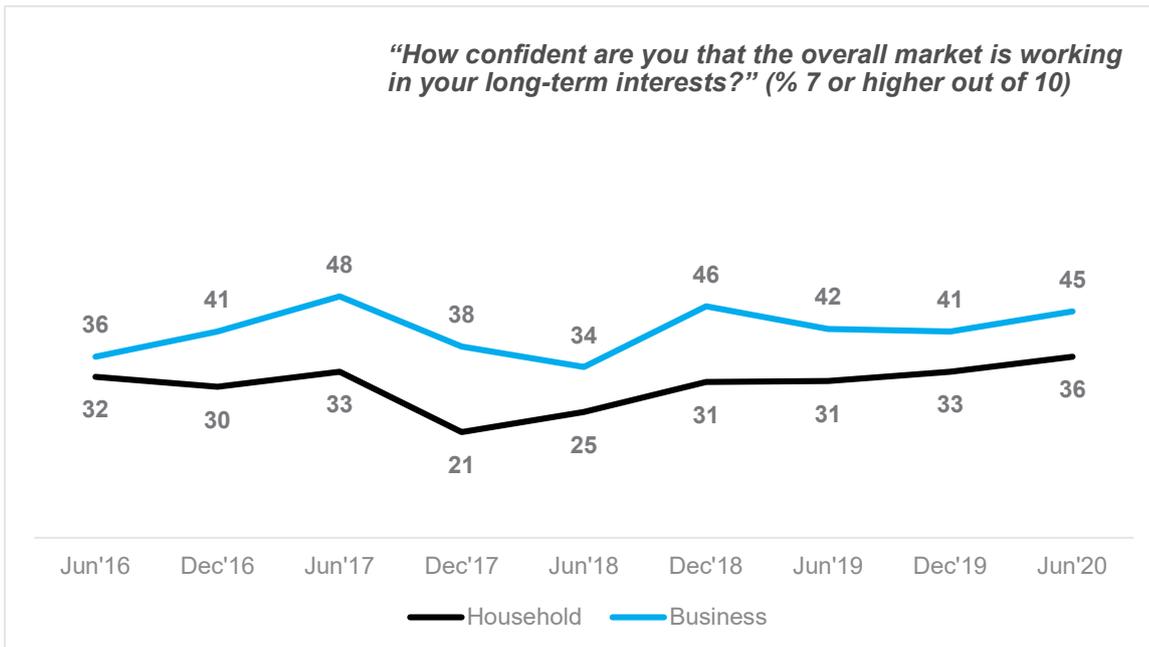
Base: All Household (n=2,216) & Business consumers (n=522)

Consumers' confidence in the availability of easily understood information has not changed among households (55%), while confidence amongst small businesses has increased to 57% (up 7%).



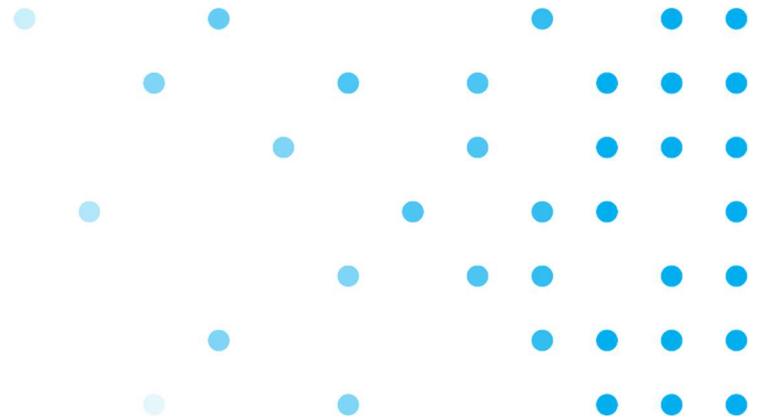
Base: All Household (n=2,216) & Business consumers (n=522)

Household consumers' confidence that the energy market is working in their long-term interests has increased steadily from a low base of 25% in June 2018 and is now at 36%. On the same question, confidence among small businesses is higher at 45% compared with 34% in June 2018.



Base: All Household (n=2,216) & Business consumers (n=522)

National findings



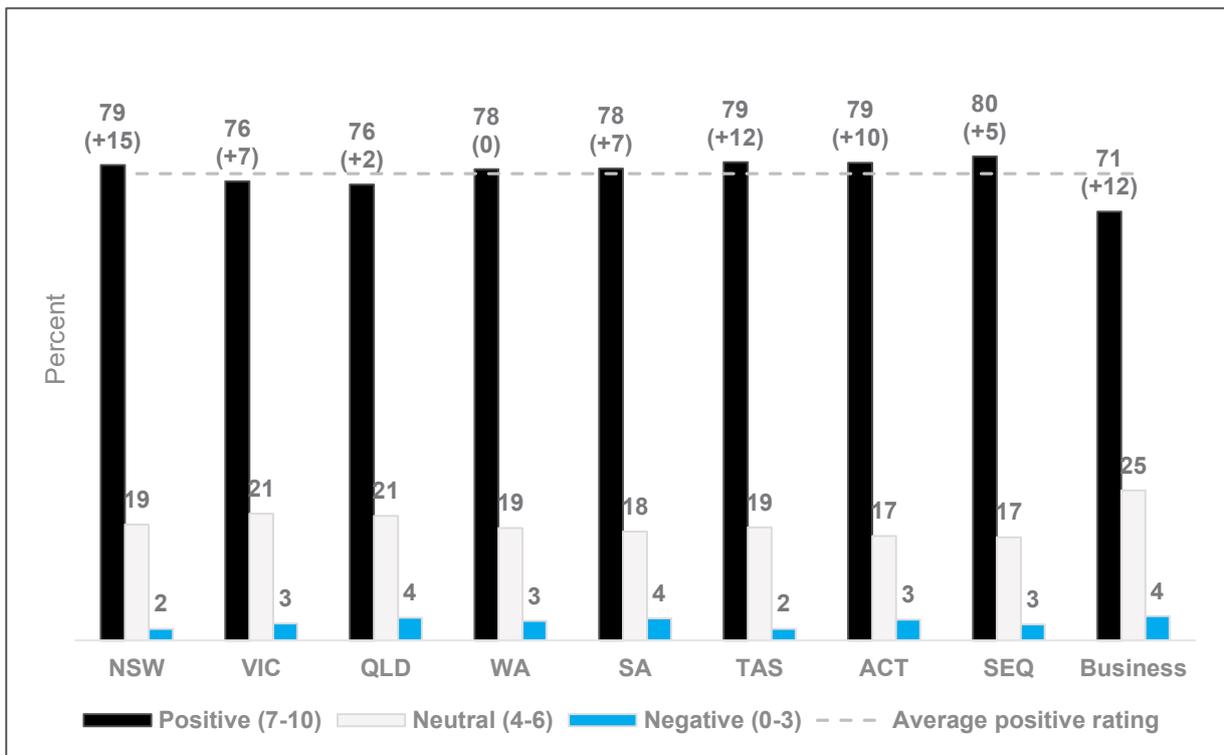
Satisfaction

Overall satisfaction

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

- The largest increases among households are in New South Wales (up 15% to 79%), Tasmania (up 12% to 79%) and the Australian Capital Territory (up 10% to 79%).
- Satisfaction among small business consumers increased by 12% (to 71%).
- No market has seen a decrease in overall satisfaction compared to the June 2019 results.
- These results are consistent with improvements we saw in the December 2019 report.

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=2,216), Small business consumers (n=522)

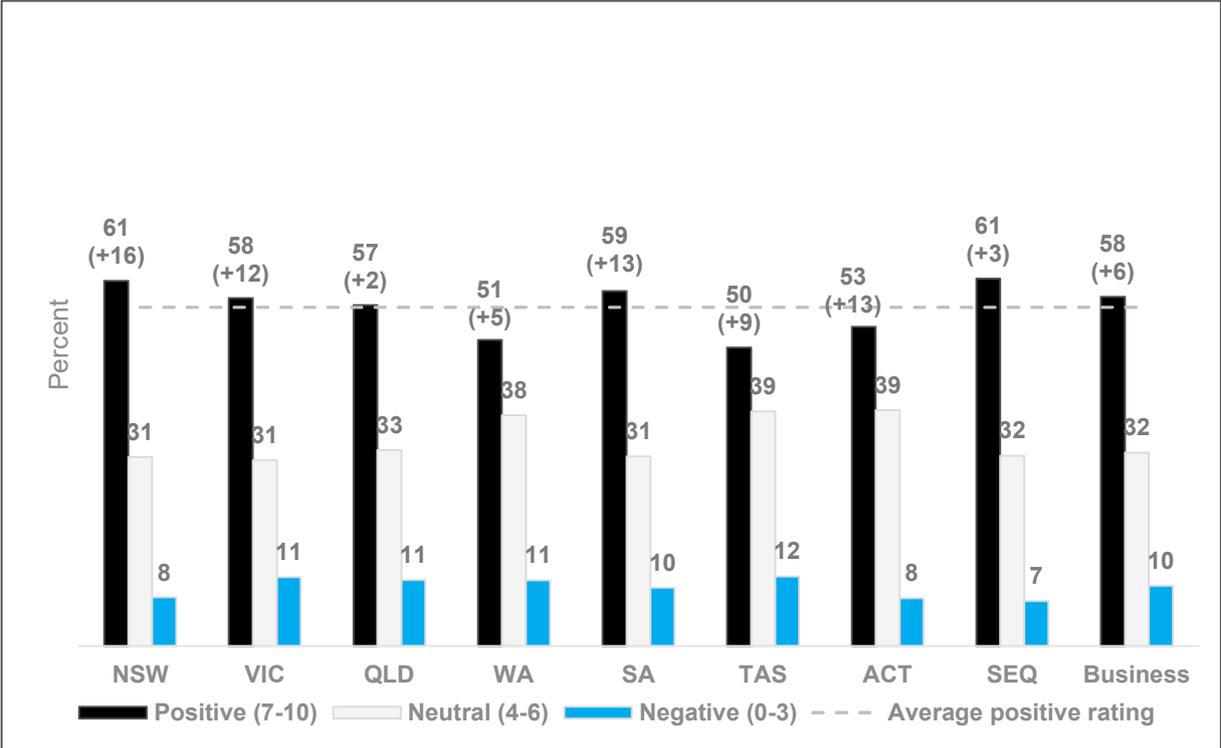
Satisfaction

Overall value for money (Electricity)

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

- The largest increases in satisfaction for overall value for money are in New South Wales (up 16% to 61%), Victoria (up 12% to 58%), South Australia (up 13% to 59%) and the Australian Capital Territory.
- Satisfaction from small business consumers also increased by 6% (to 58%).
- Again, these increases are consistent with similar increases noted in the December 2019 report.

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'



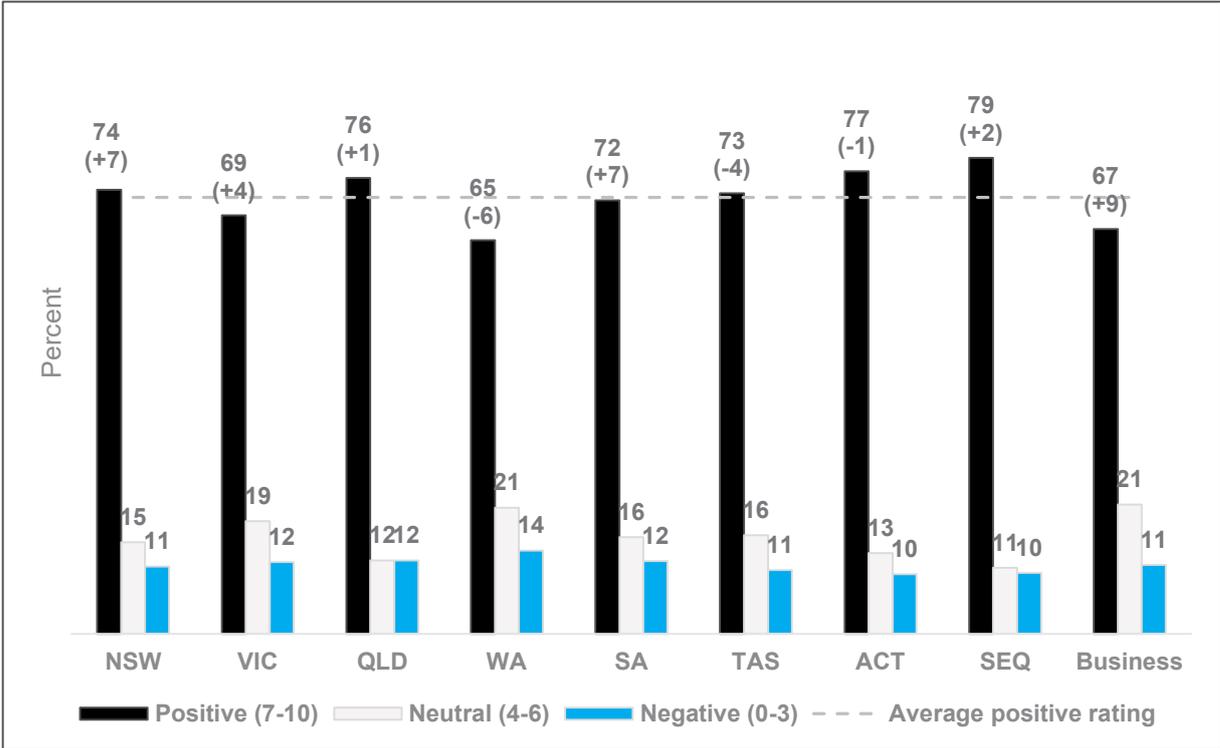
Base: Household consumers (n=2,216), Small business consumers (n=522)

Reliability (Electricity)

We continue to see high levels of satisfaction with the reliability of electricity supply in all markets.

- The largest increases in satisfaction are in New South Wales (74%, up 7%) and South Australia (72%, up 7%).
- Western Australia (65%, down 6%) and Tasmania (73%, down 4%) are the only states to experience decreases in satisfaction with electricity reliability.
- Small business satisfaction with electricity reliability increased by 9% (to 67%).

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



Base: Household consumers (n=2,216), Small business consumers (n=522)

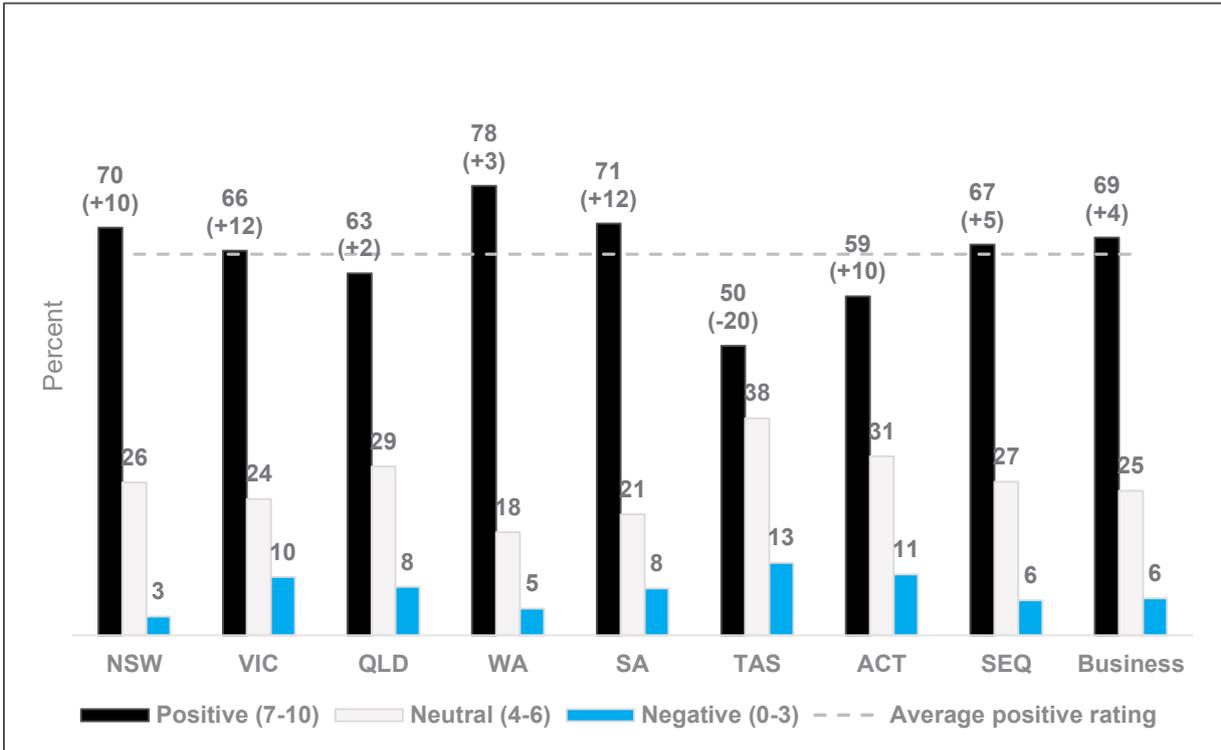
Satisfaction

Overall value for money (Gas)

Southern states indicate the biggest increases in satisfaction with gas provision

- The biggest increases in satisfaction are in New South Wales (up 10% to 70%), Victoria (up 12% to 66%), South Australia (up 12% to 71%) and the Australian Capital Territory (up 10% to 59%).
- Satisfaction with value for money of gas decreased 20% in Tasmania* (to 50%) from a high of 70% in June 2019.

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=1,405), Small business gas consumers (n=344)

*Note: Small sample sizes for Tasmania (n=56) and South East Queensland (n=83).

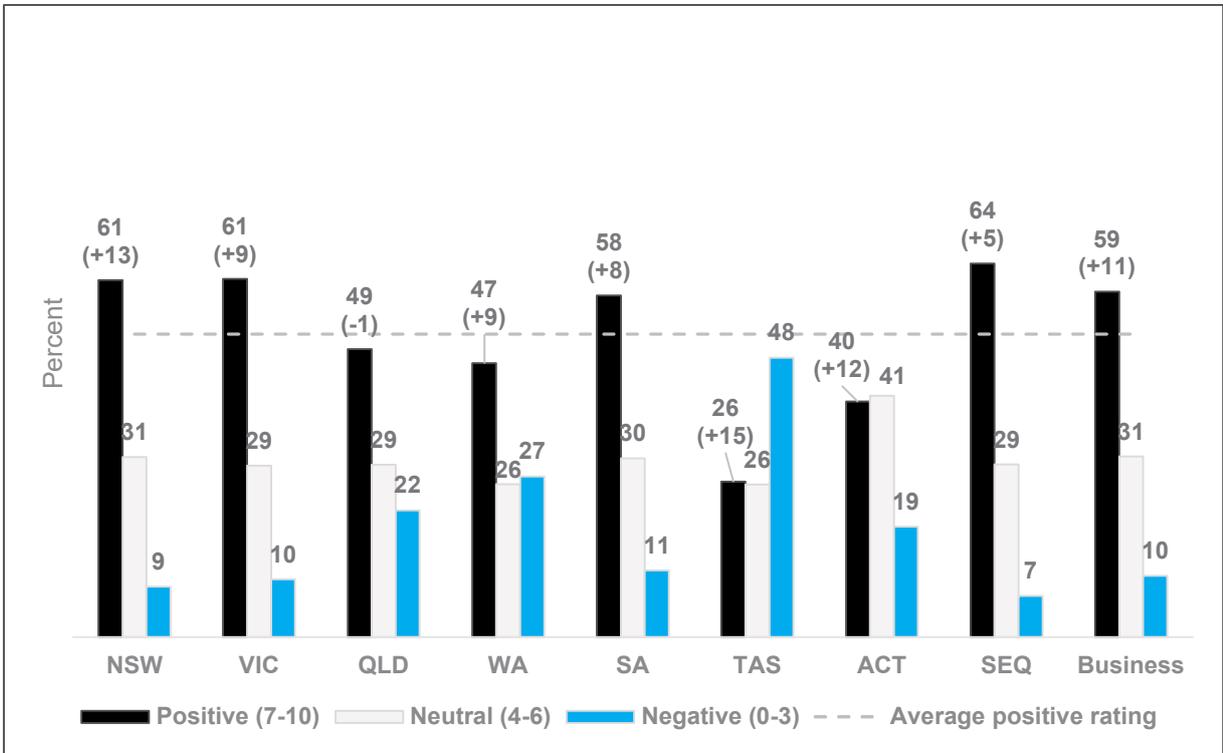
Satisfaction

Level of competition

Satisfaction with levels of competition in the energy market is up in all markets except in Queensland.

- Satisfaction with competition increased in New South Wales (up 13% to 61%), Victoria (up 9% to 61%), South Australia (up 8% to 58%), Western Australia (up 9% to 47%) and the Australian Capital Territory (up 12% to 40%).
- In Tasmania, which saw a new retailer enter the market in February 2019, satisfaction with the level of competition increased 15% (to 26%).
- Small businesses also recorded an increase of 11% in satisfaction with competition (to 59%).
- South East Queensland has the highest level of satisfaction on this question (64%, up 5%) but the overall Queensland outcome is stable at 49%.

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'



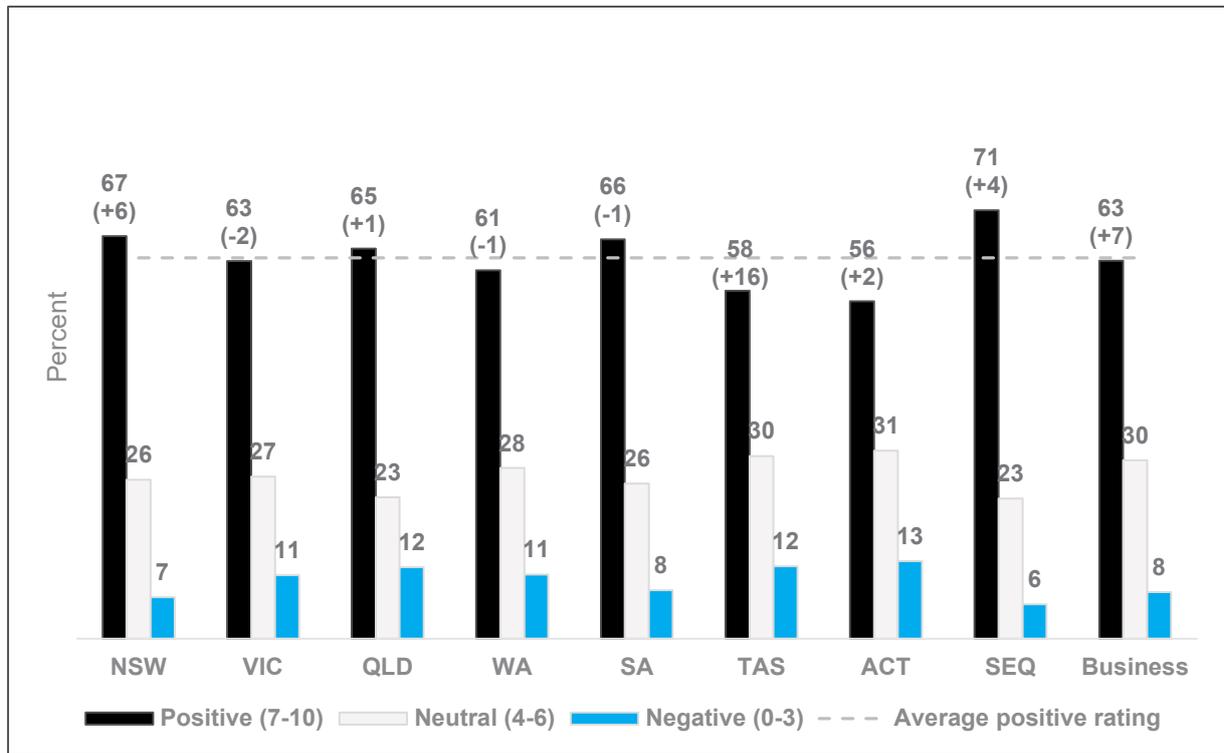
Base: Household consumers (n=2,216), Small business consumers (n=522)

Consumer confidence in their abilities

Consumers have relatively high levels of confidence in their own ability to make choices about energy products and services

- Tasmania’s confidence increased the most on this question (up 16% to 58%) followed by NSW up 6% (to 67%).
- Other states and territories remain relatively consistent with results from June 2019.
- Small business consumers’ confidence in their abilities increased 7% (to 63%).

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



Base: Household consumers (n=2,216), Small business consumers (n=522)

Confidence

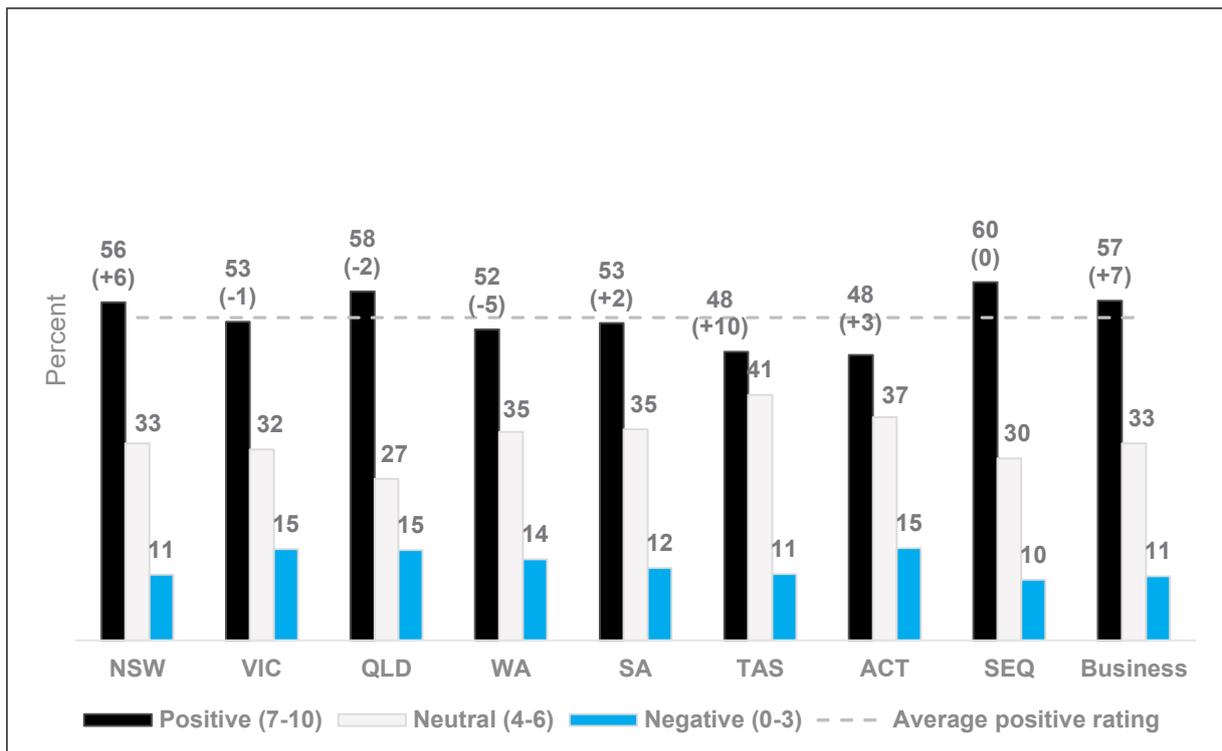
Confidence in the availability of information

Consumer confidence that there is enough easily understood information available for consumers to make decisions about energy products and services is largely stable.

- Household consumers' confidence that there is enough information increased in Tasmania (up 10% to 48%) and New South Wales (up 6% to 56%), but fell by 5% in Western Australia (to 52%)
- Small business consumers' confidence on this question also increased by 7% (to 57%).

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=2,216), Small business consumers (n=522)

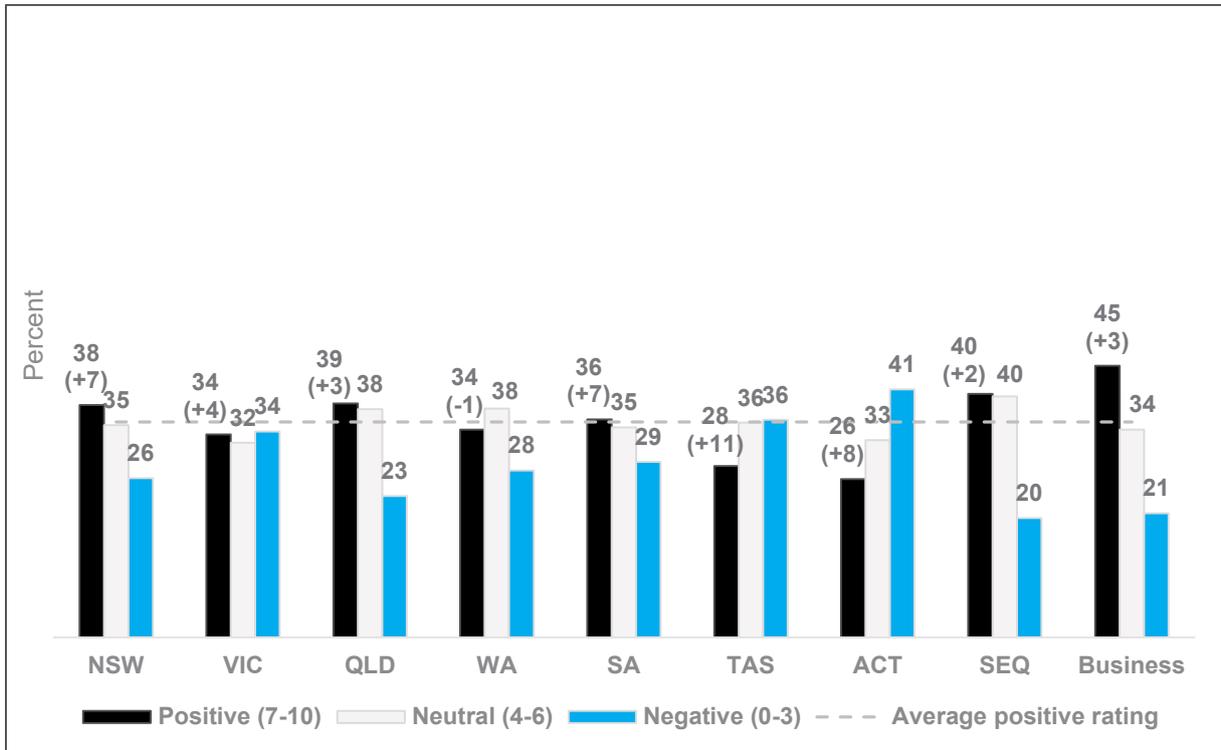
Confidence

Confidence in the market

Consumer confidence that the energy market is working in their long-term interests continues to increase but remains low compared to other confidence measures.

- The largest increases for this measure are in Tasmania (up 11% to 28%), the ACT (up 8% to 26%), New South Wales (up 7% to 38%) and South Australia (up 7% to 36%).
- Notwithstanding increases in most states and territories, household consumers' confidence in the market remains low, with results for individual jurisdictions ranging from 26% in the ACT to 40% in South East Queensland.
- Small business consumers are more confident but still less than half (45%) are confident that the market is working in their long-term interests.

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'



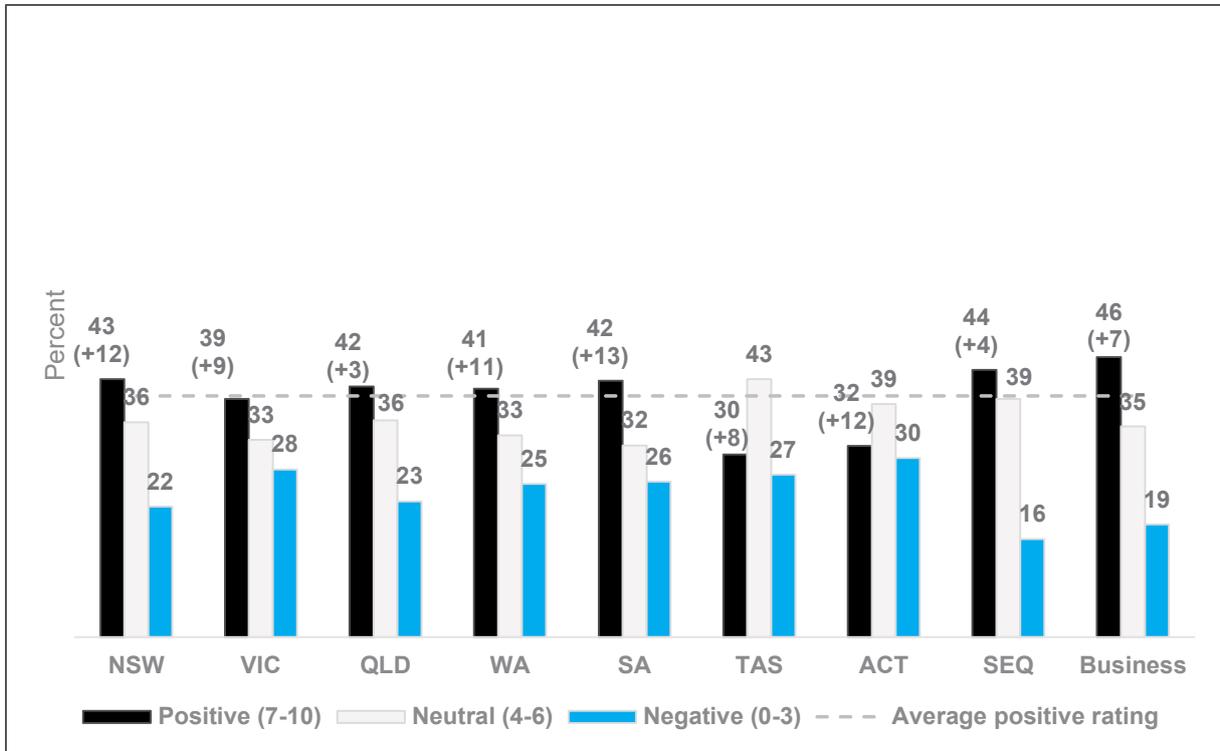
Base: Household consumers (n=2,216), Small business consumers (n=522)

Confidence in the future value for money

There is a noticeable increase in consumer confidence in future value for money across the country, but no jurisdiction has reached 50% yet.

- Confidence that the energy market will provide better value for money in the next five years increased most in South Australia (up 13% to 42%), the ACT (up 12% to 32%), New South Wales (up 12% to 43%) and Western Australia (up 11% to 41%).
- The only jurisdiction that didn't see a large increase was Queensland, where household consumers already had higher confidence than in other jurisdictions.
- Small business confidence on this question increased by 7% (to 46%).
- Confidence in future value for money outcomes remains lower than satisfaction with current value for money in all markets.

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'



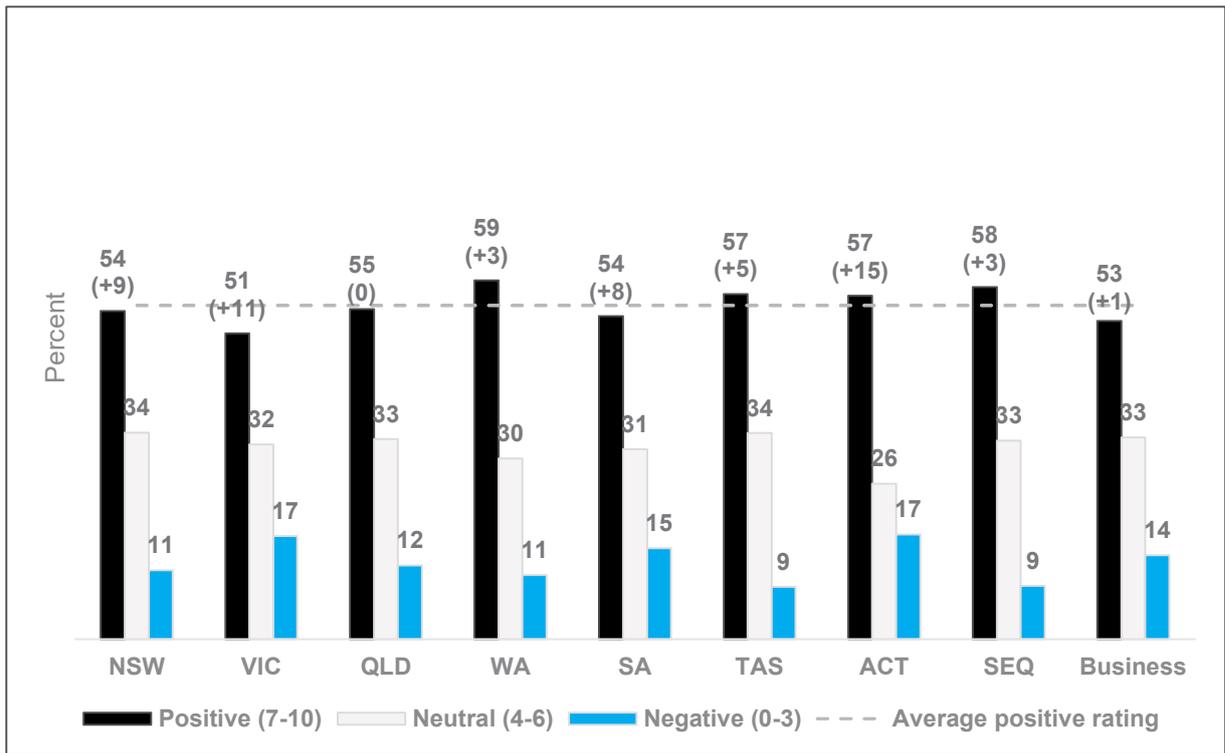
Base: Household consumers (n=2,216), Small business consumers (n=522)

Confidence in future reliability

The proportion of consumers expressing confidence that the market will deliver increased reliability, has increased or held steady in all markets.

- Australian Capital Territory (up 15% to 57%), Victoria (up 11% to 51%) and New South Wales (up 9% to 54%) indicate the greatest increases.
- Confidence in future reliability is still lower than satisfaction with current reliability in all markets.

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=2,216), Small business consumers (n=522)

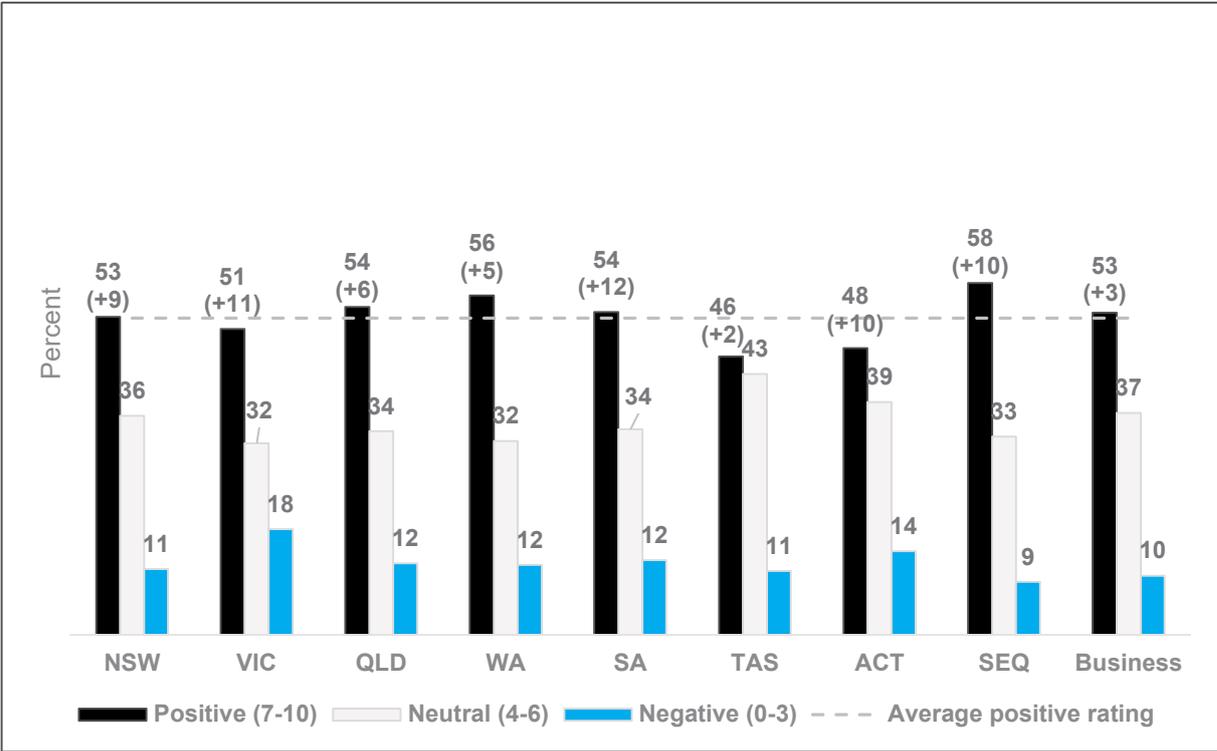
Confidence

Confidence in future technology

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

- South Australia (up 12% to 54%), Victoria (up 11% to 51%), South East Queensland (up 10% to 58%) and the ACT (up 10% to 48%) saw the largest increases in confidence on this question.

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



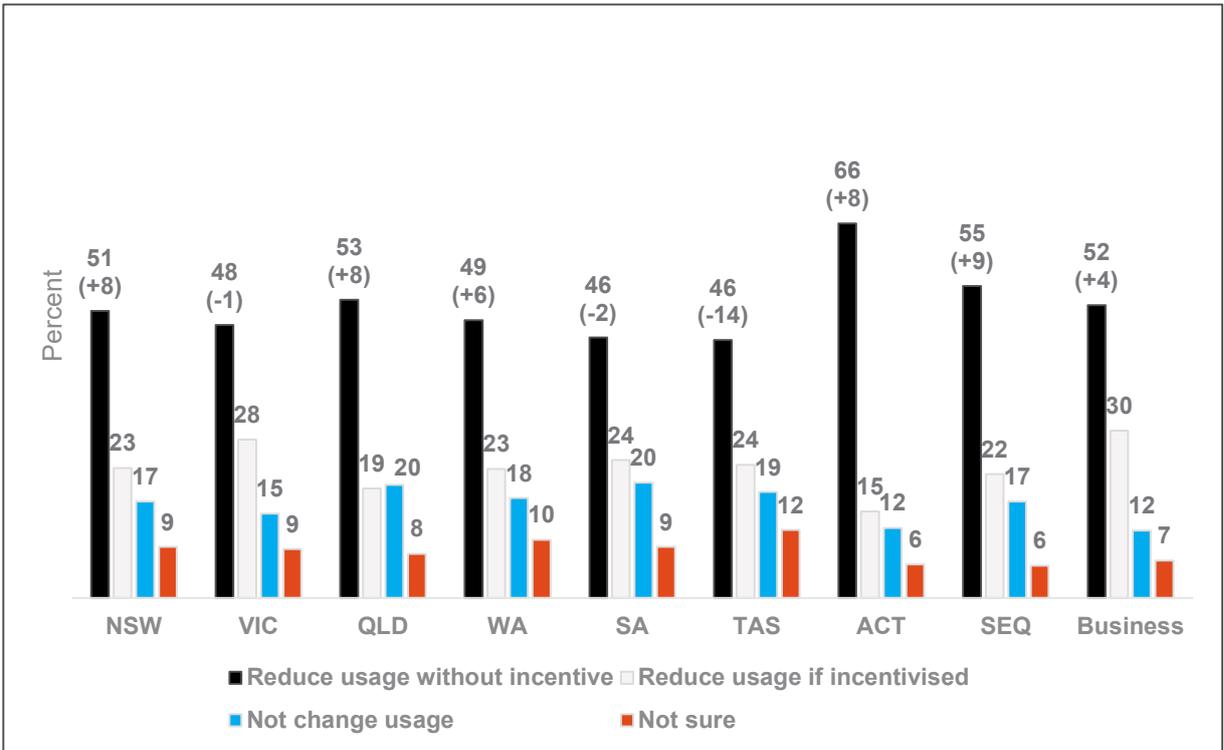
Base: Household consumers (n=2,216), Small business consumers (n=522)

Energy use reduction campaigns

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

- Depending on the jurisdiction, 70-81% of household consumers would respond to a campaign to lower energy use. That number is even higher among small businesses (82%).
- Over half of households in the ACT, Queensland and New South Wales would be prepared to reduce their energy usage without incentive.
- 52% of small businesses would take action without an incentive.
- Overall, about one in four household consumers would require an incentive to reduce their energy use during periods of very high demand and 30% of small businesses would 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? (%)

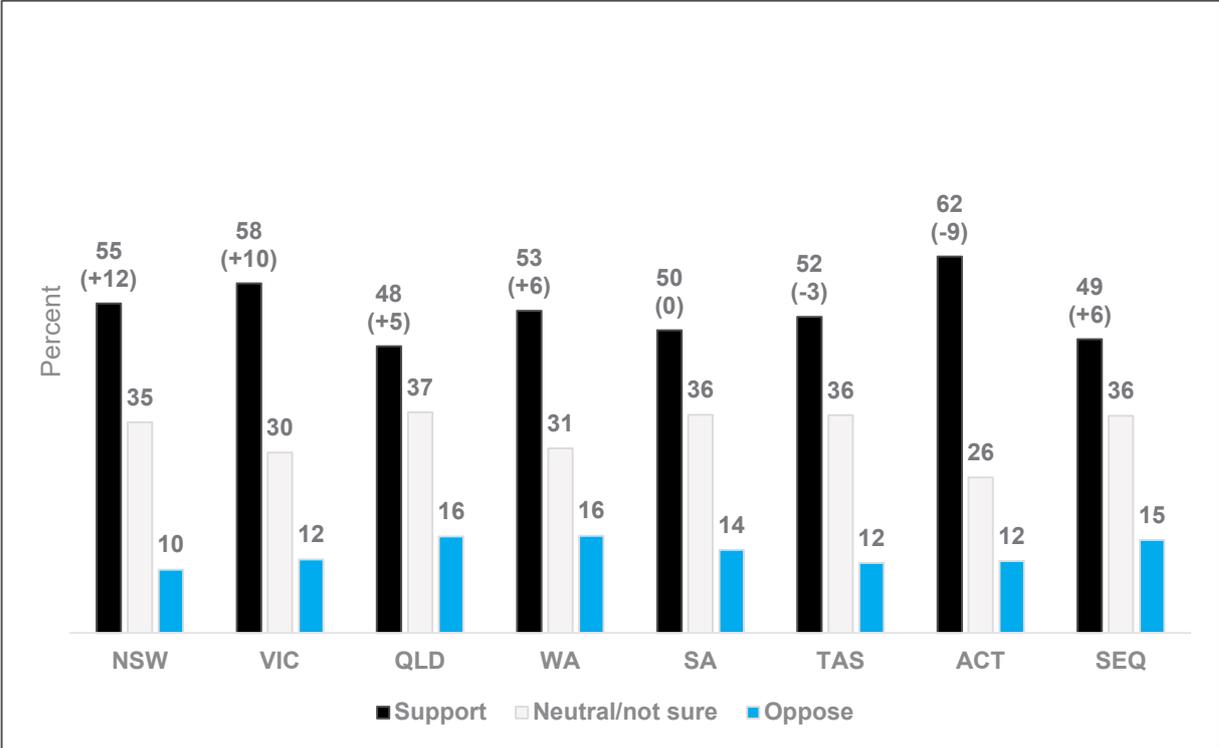


Mandatory labelling schemes

Apart from Queensland, more than half of all households support a mandatory energy efficiency labelling scheme for houses.

- Although support for mandatory labelling in the territory is down 9%, the ACT is still higher on this measure than any of the states at 62%.
- New South Wales saw the biggest increase in support for this measure, up 12% (to 55%).
- Support in Victoria is up 10% (to 58%).

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 (%)



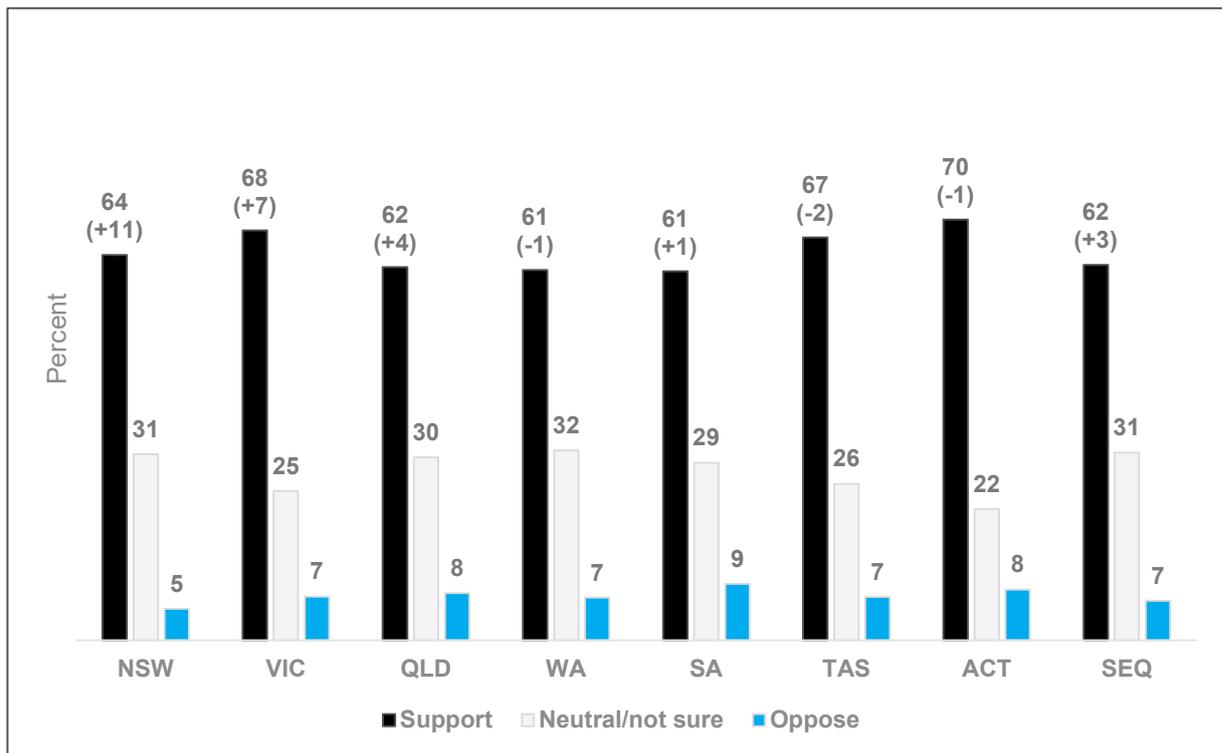
Base: Household consumers (n=2,216)

Minimum efficiency standards

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

- Overall support from renters is now at 73%, 13% higher than among home-owners (60%).
- New South Wales experienced the largest increase in support from June 2019 (up 11% to 64%).
- Of those who do not support the initiative, most are neutral or unsure – less 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 (%)



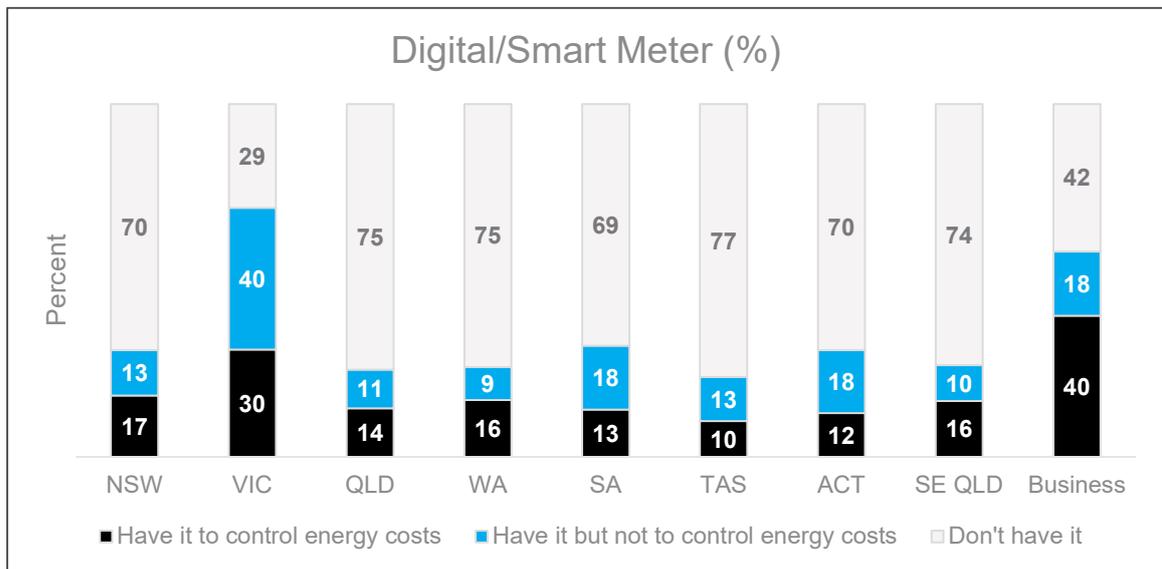
Base: Household consumers (n=2,216)

Technology to control energy costs

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

- In Victoria, smart meters were rolled out through a State Government program, but only 70% of household consumers report having one and just 30% say that they use it to control energy costs.
- Small businesses also report a relatively high uptake of smart meters (58%) with 40% saying they use the device to manage their energy costs.
- In other states and territories, between 23% (TAS) and 31% (SA) report having a smart meter. Again, around half of households who have the device, use it to manage energy costs.

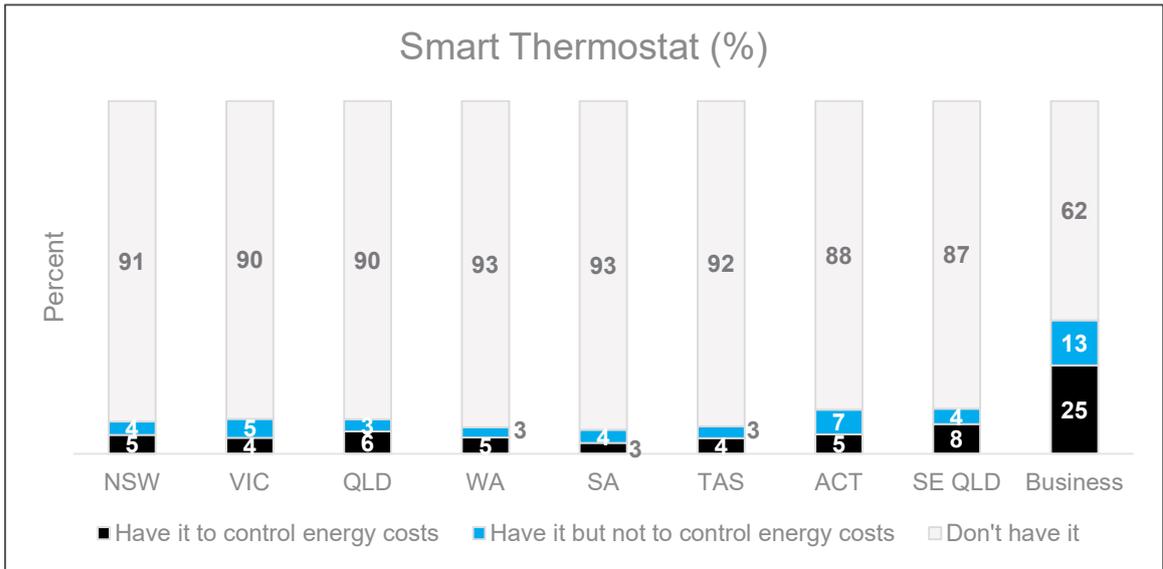
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)



Base: Household consumers (n=2,216), Small business consumers (n=522)

- Fewer than 1 in 10 households say they own a smart thermostat, compared to 38% of small businesses.

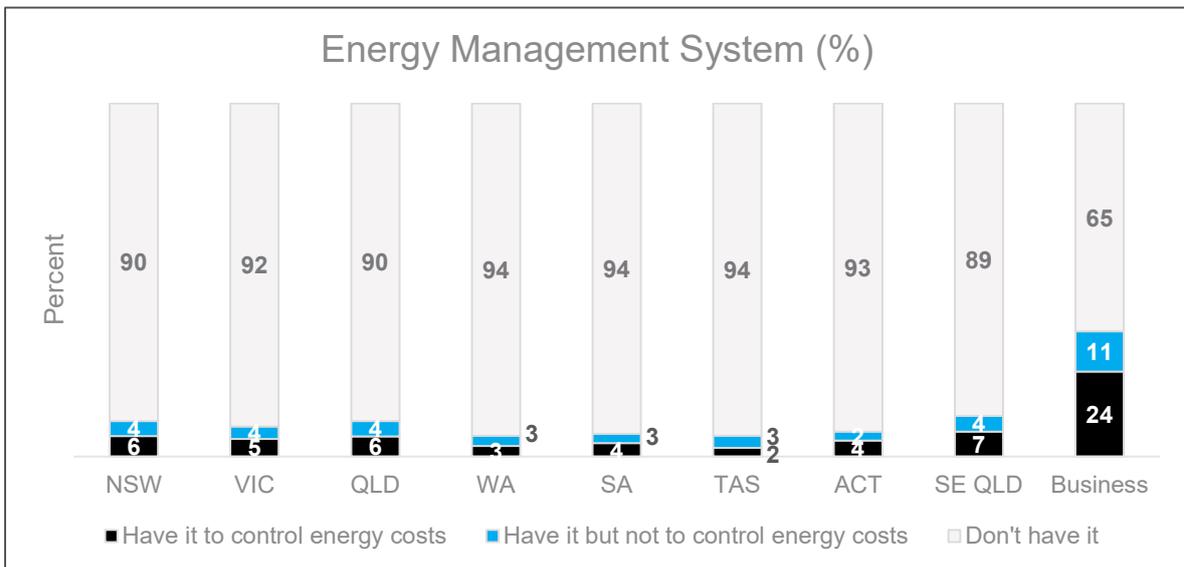
Which of the following technology do you have at your household / place of business? And which do you use to help control your energy costs? (%)



Base: Household consumers (n=2,216), Small business consumers (n=522)

- 35% of small businesses say they have an energy management system, while uptake is less than 10% among households in most markets (except QLD and NSW).

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? (%)

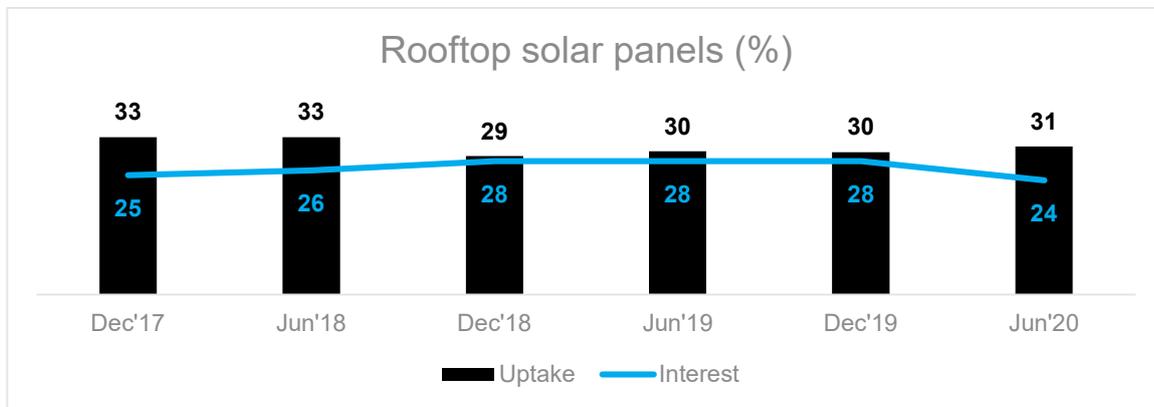


Base: Household consumers (n=2,216), Small business consumers (n=522)

Uptake of energy efficient technologies

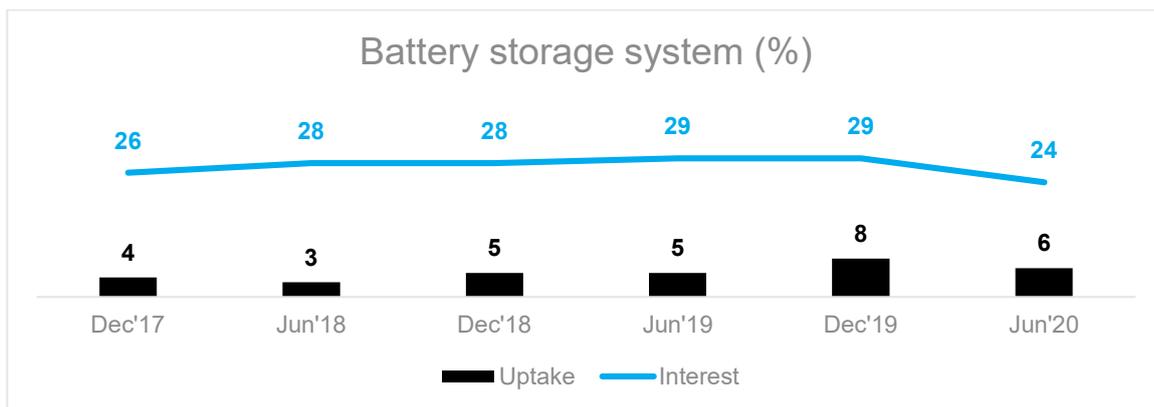
The research looked at whether consumers who do not already have specific technologies are considering getting them in the future. This section focuses on those technologies that consumers are most likely to see as ways they can use energy more efficiently.

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.



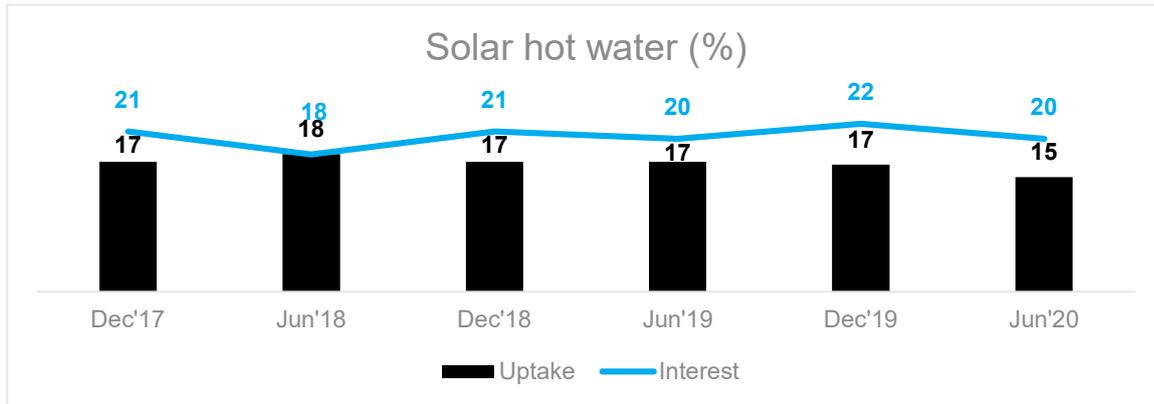
Uptake Base: All Household consumers (n=2,216)

Interest Base: All Household consumers which do not own product (n=1,508)



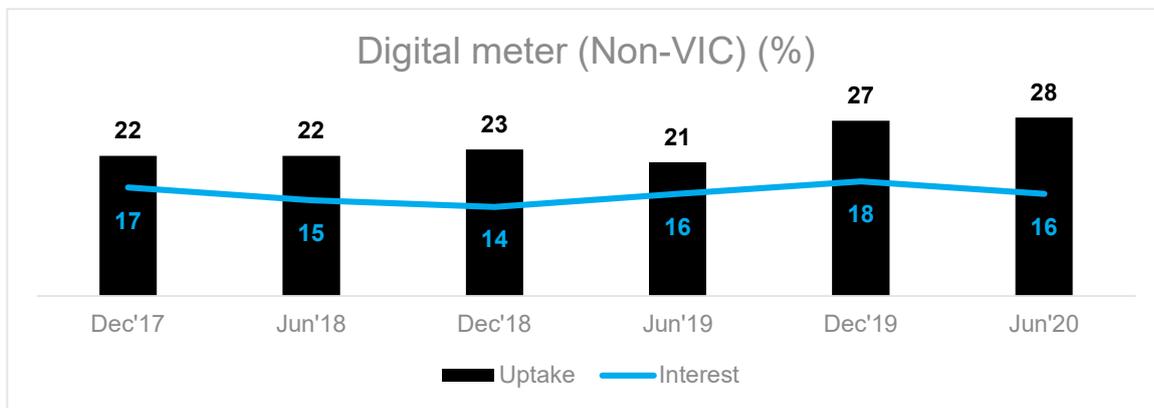
Uptake Base: All Household consumers (n=2,216)

Interest Base: All Household consumers who do not own product (2,096)



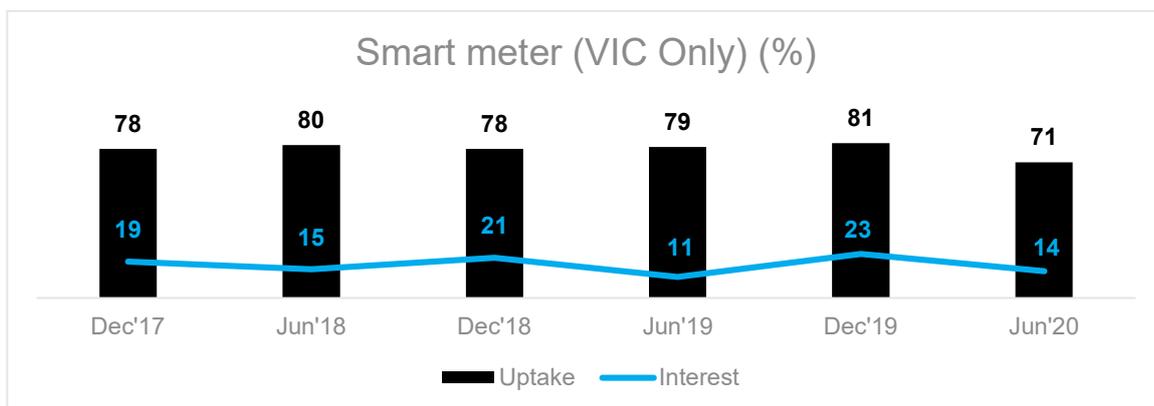
Uptake Base: All Household consumers (n=2,216)

Interest Base: All Household consumers who do not own product (n=1,895)



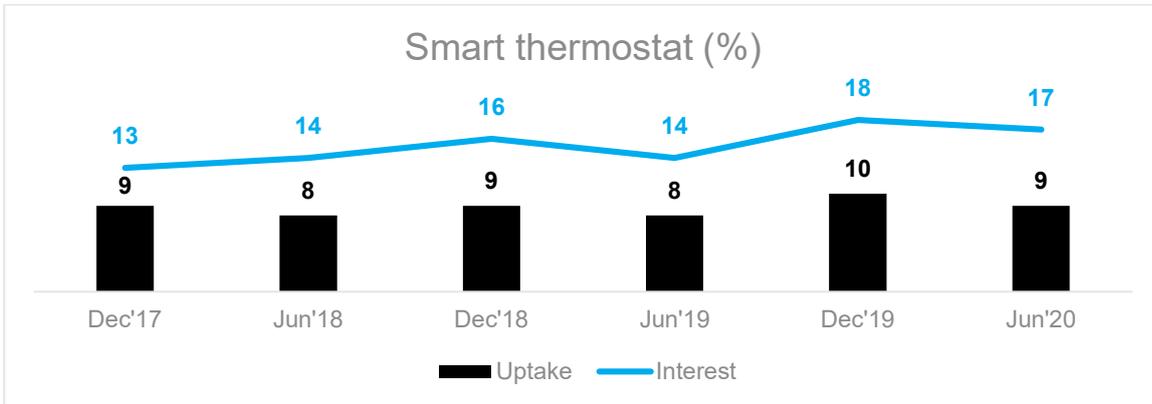
Uptake Base: All Household consumers not in Victoria (n=1,788)

Interest Base: All Household consumers not in Victoria who do not own product (n=1,298)



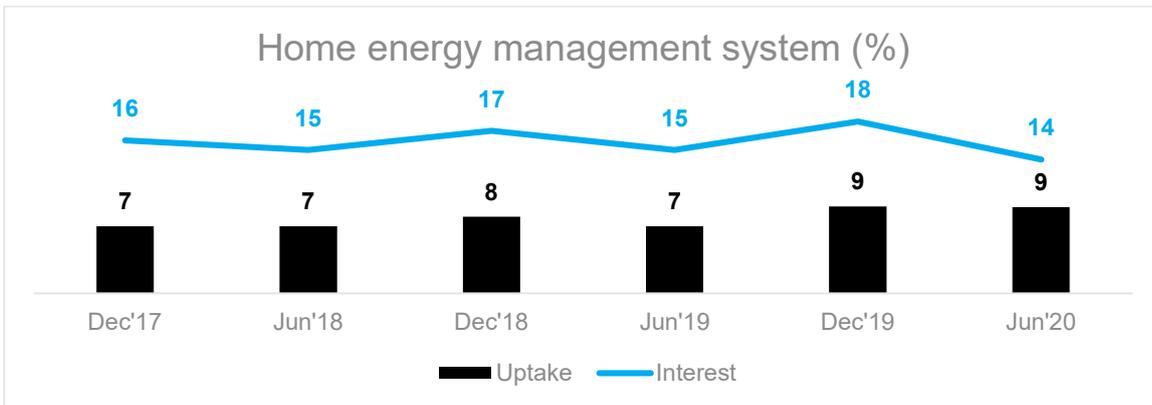
Uptake Base: All Household consumers in Victoria (n=428)

Interest Base: All Household consumers in Victoria who do not own product (n=126)



Uptake Base: All Household consumers (n=2,216)

Interest Base: All Household consumers who do not own product (n=2,021)



Uptake Base: All Household consumers (n=2,216)

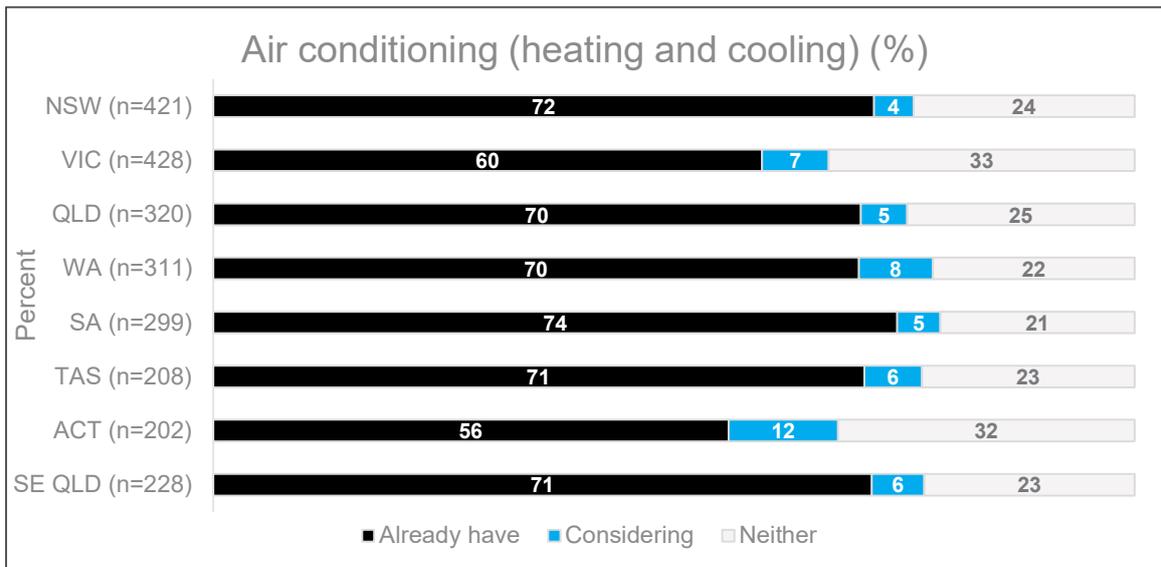
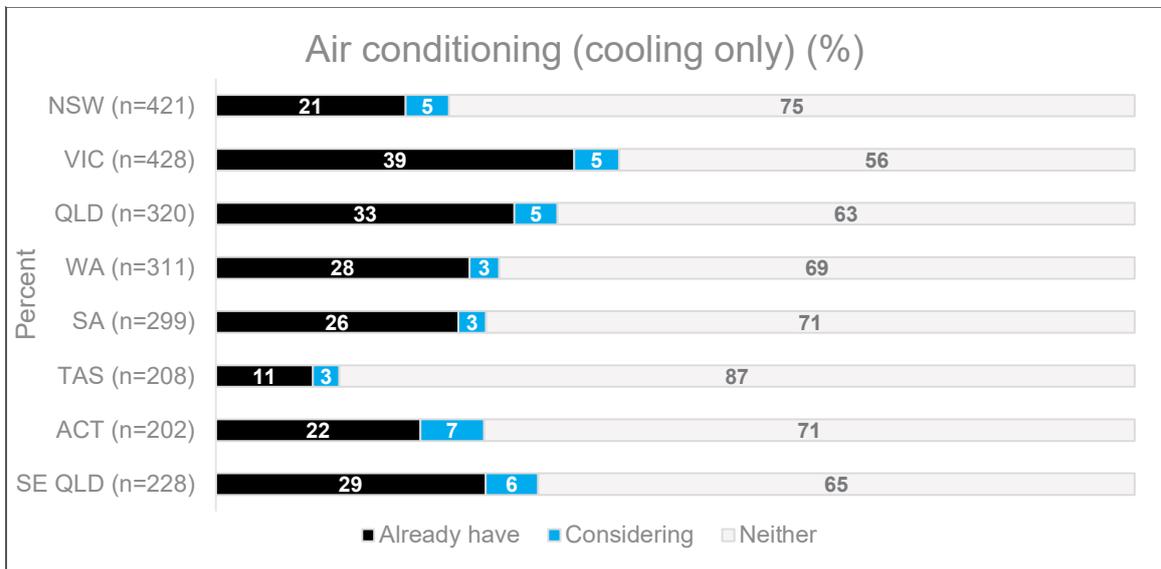
Interest Base: All Household consumers who do not own product (n=2,043)

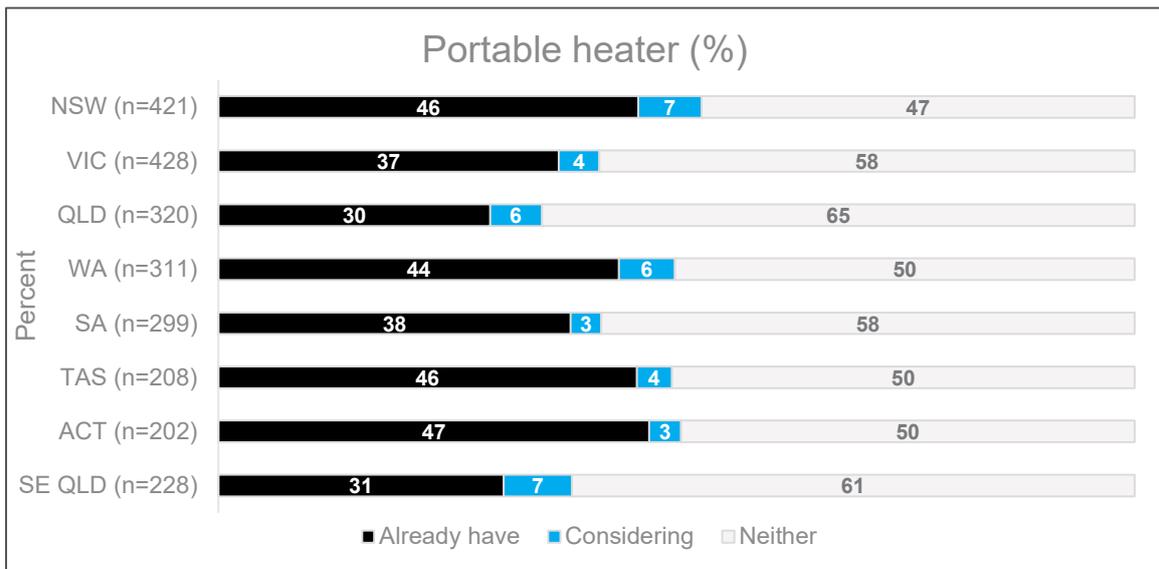
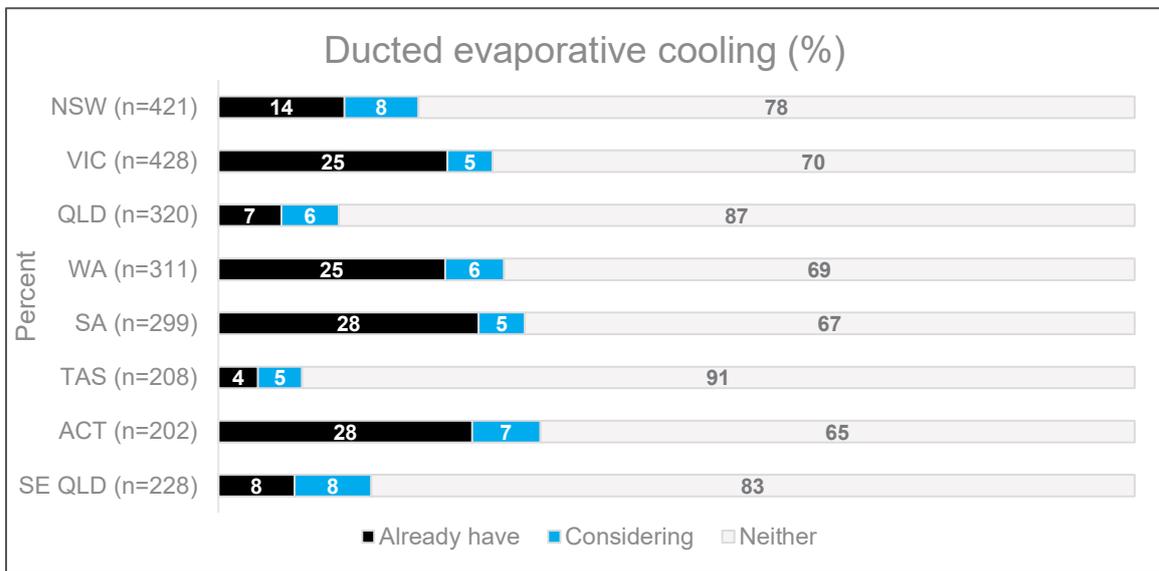
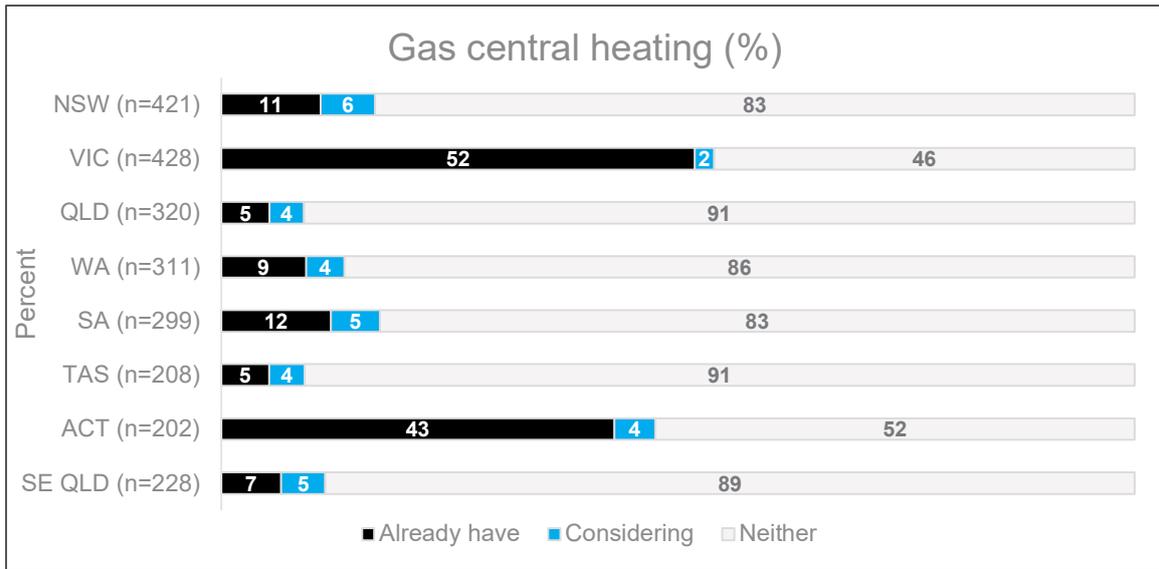
Activity

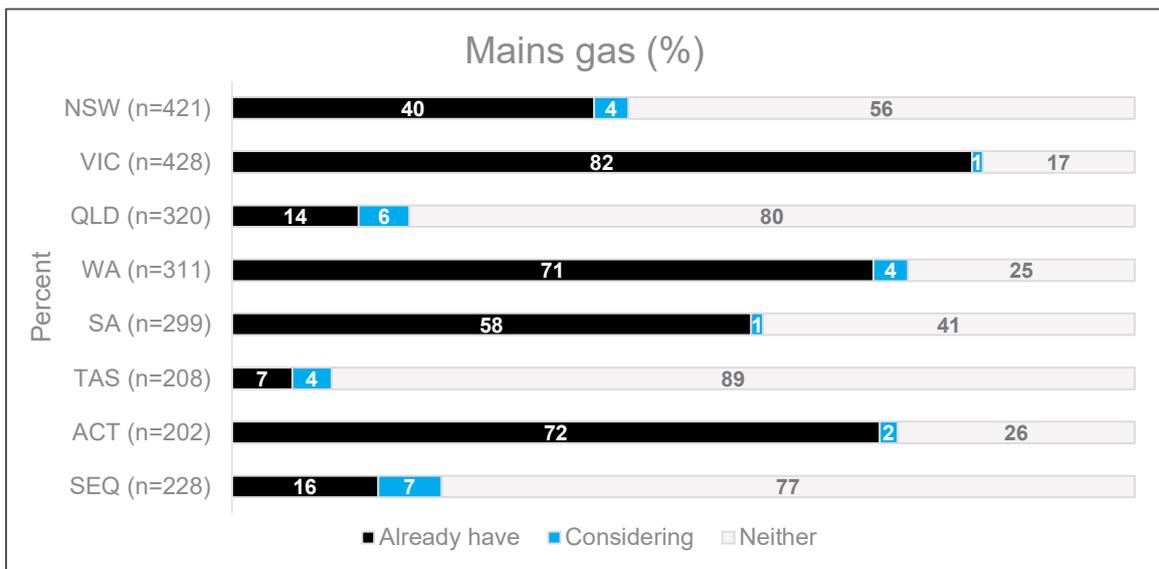
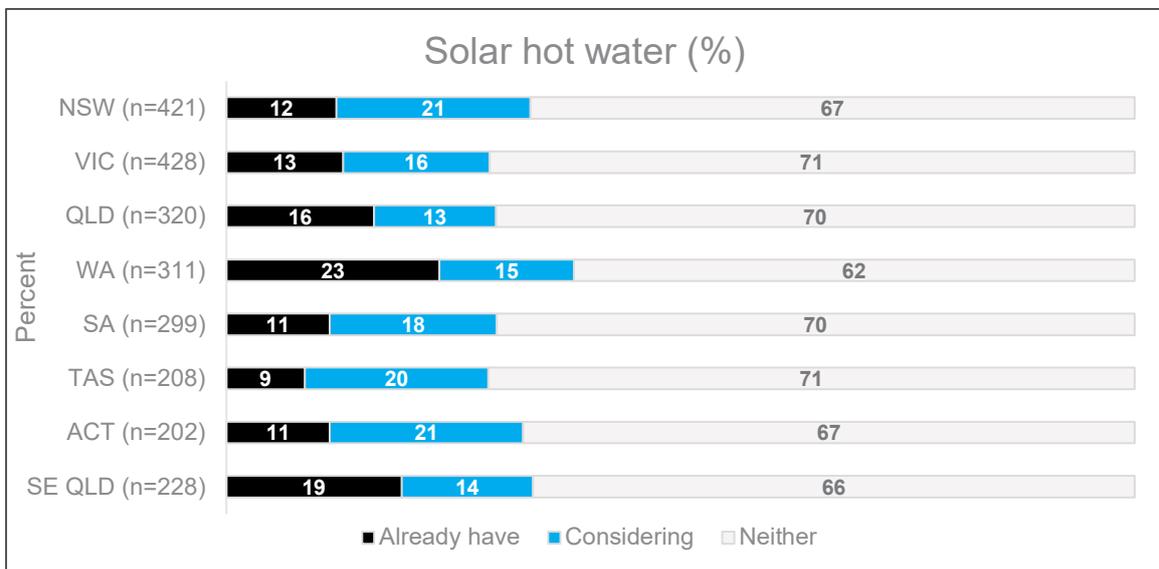
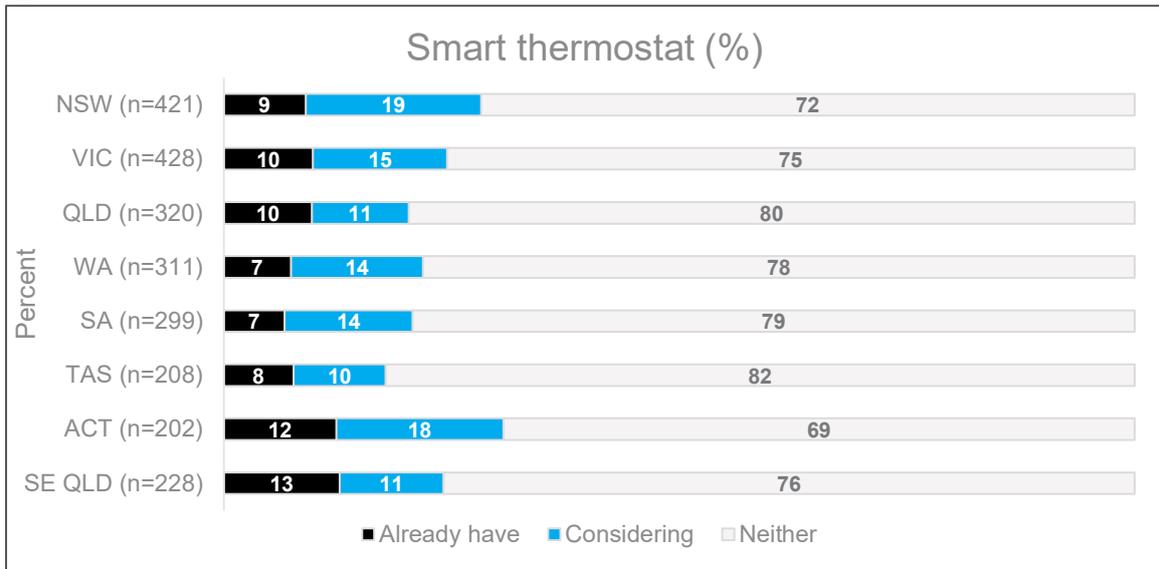
What investments are people considering

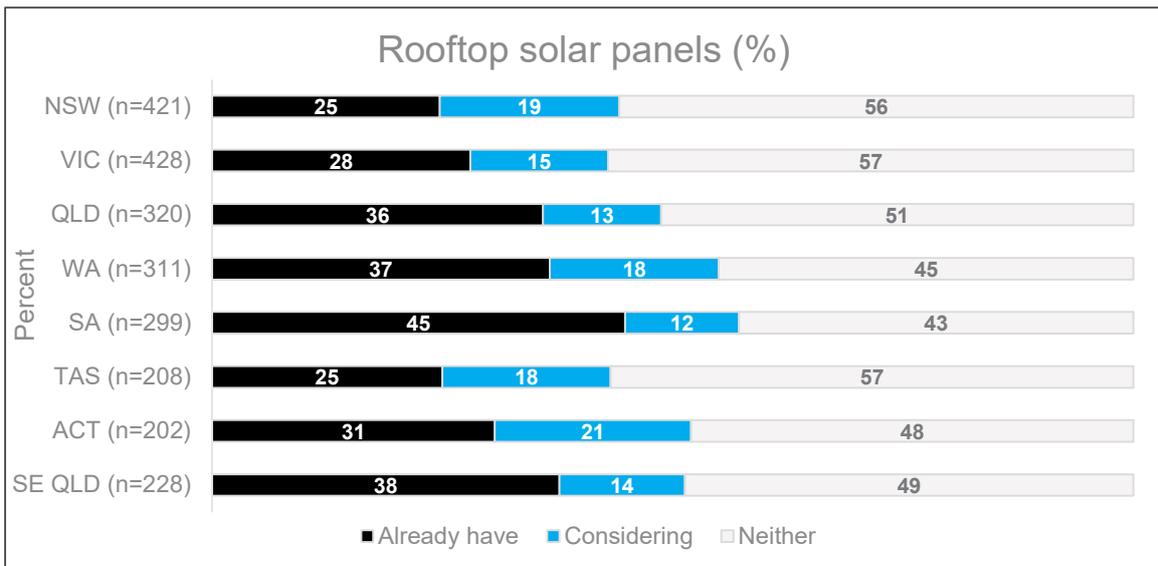
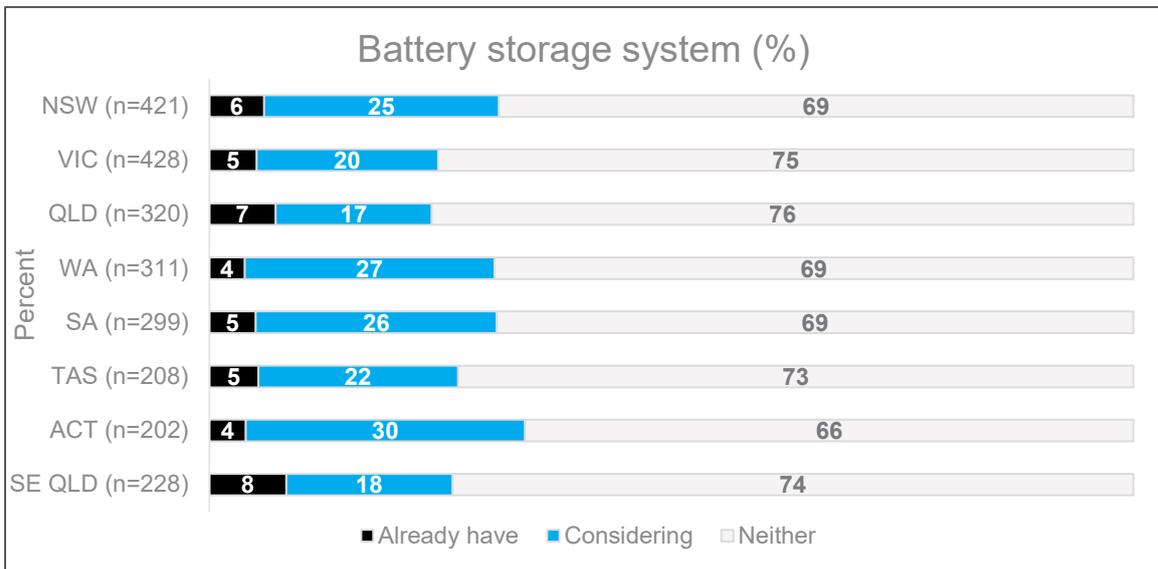
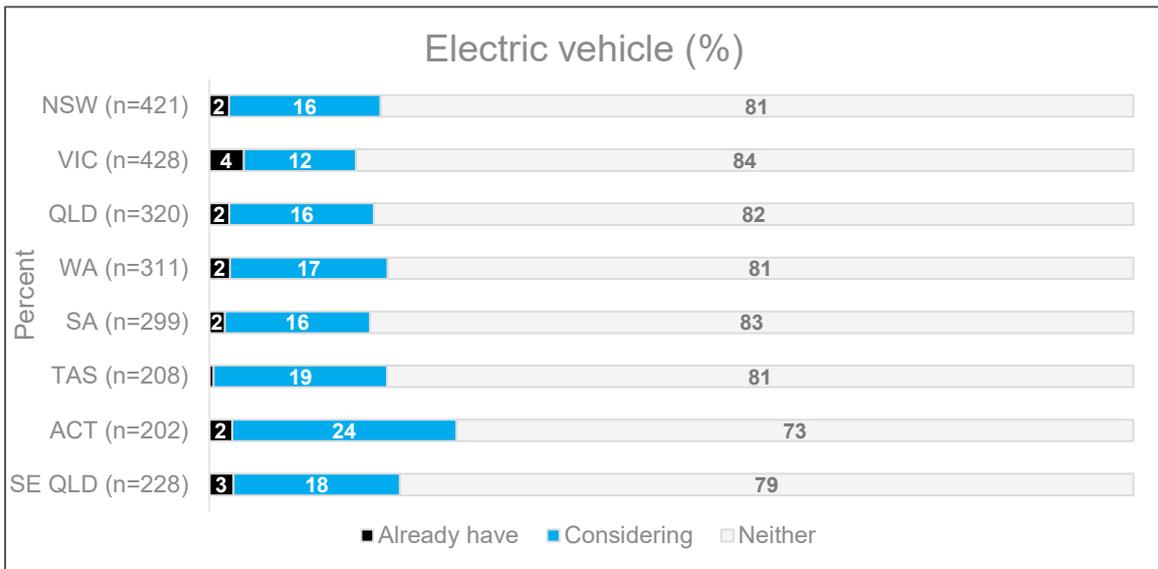
Which of the following technology do you have at your household? And which do you use to help control your energy costs? (%)
[If not] Which of the following are you intending to purchase for your home?

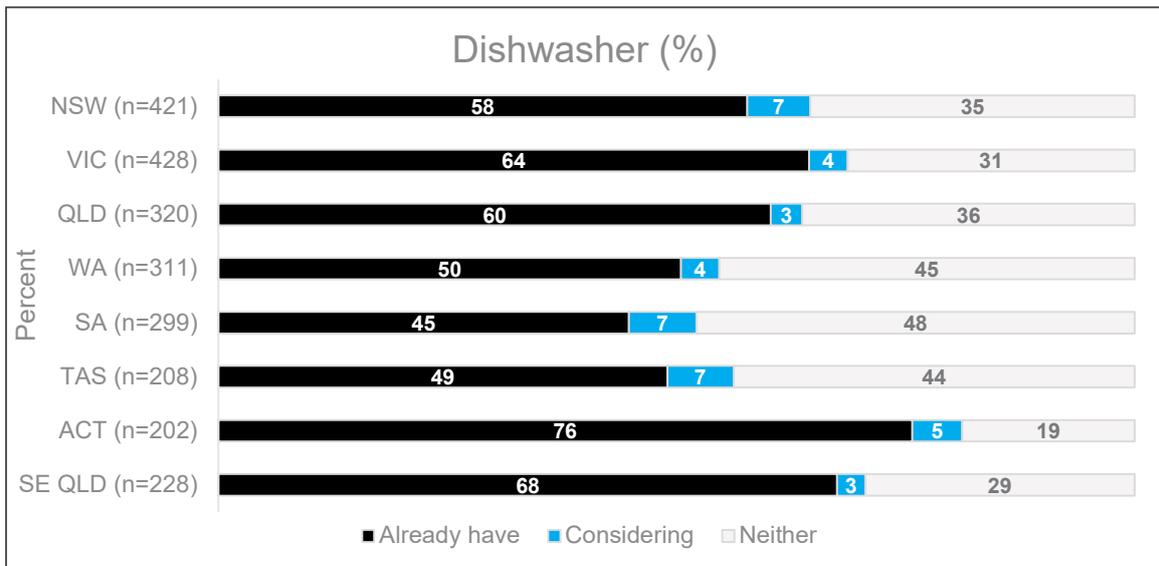
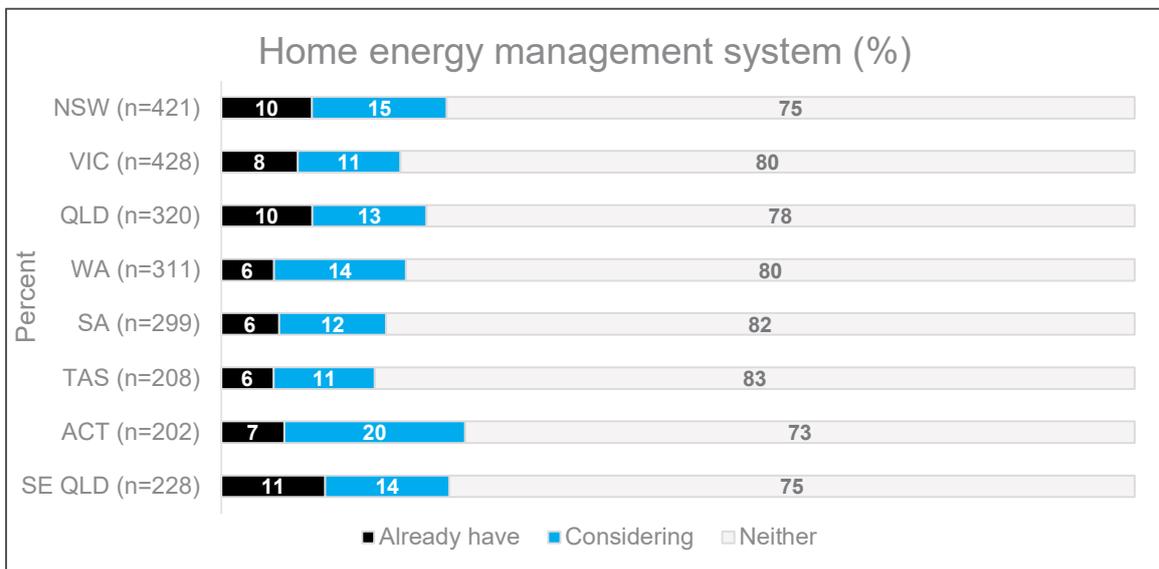
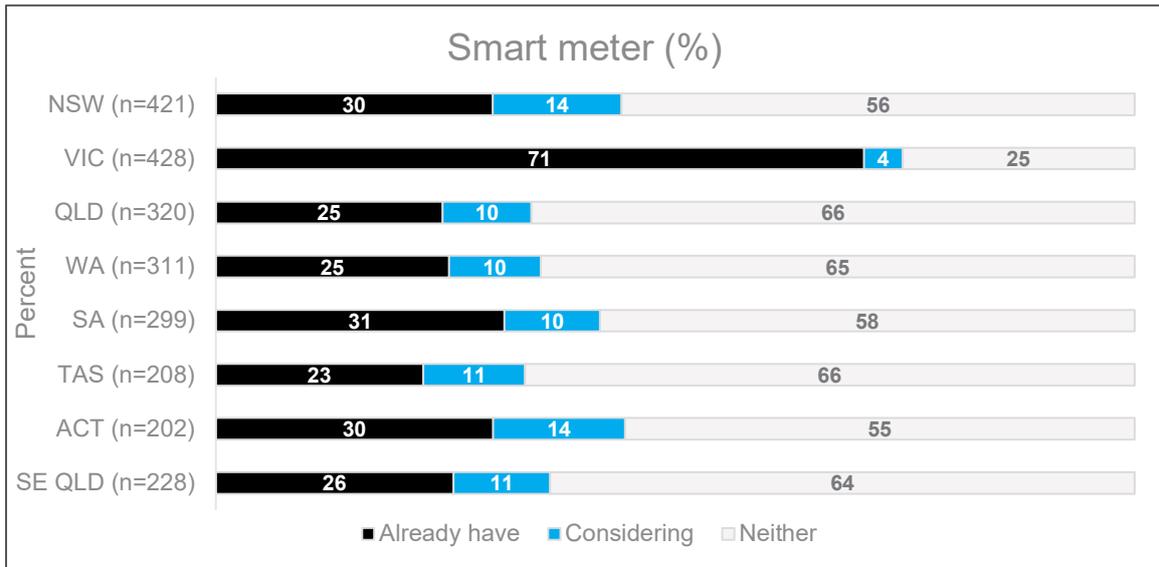
Base: Household consumers in each state

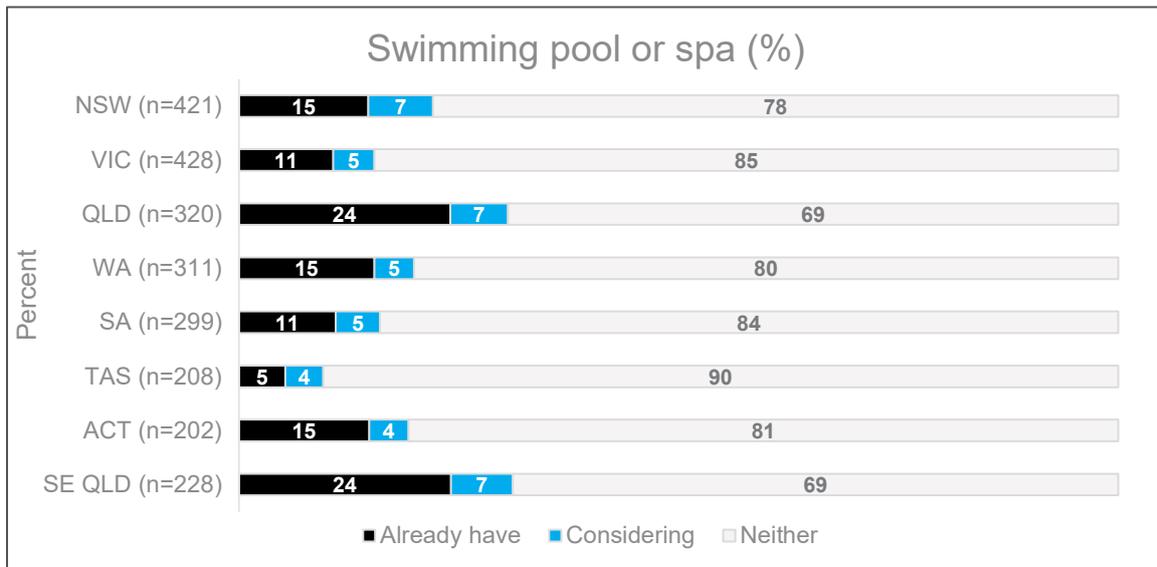












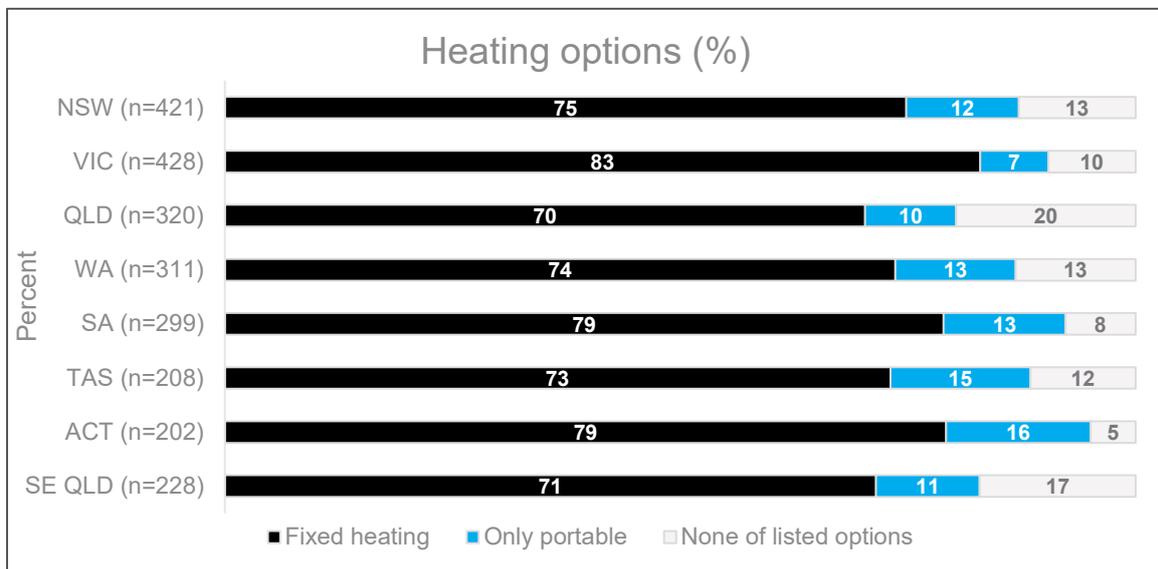
Home heating

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

- 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 proportions found in Victoria (83%).
- Heating options are less common in Queensland (20% report no heating).
- ACT and Tasmania have the highest uptake of portable heating options (16% and 15% respectively).

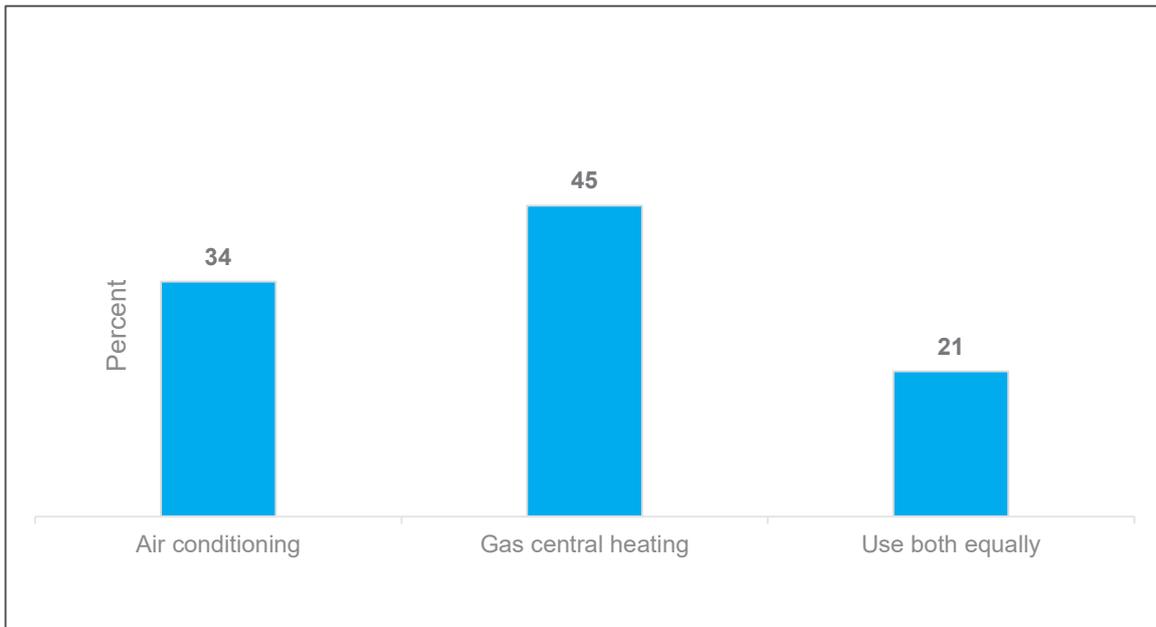


The choice between air conditioning & gas central heating

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

- 45% use their gas central heating more than air conditioning, while 34% say they use their air conditioning.
- 21% 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? (%)



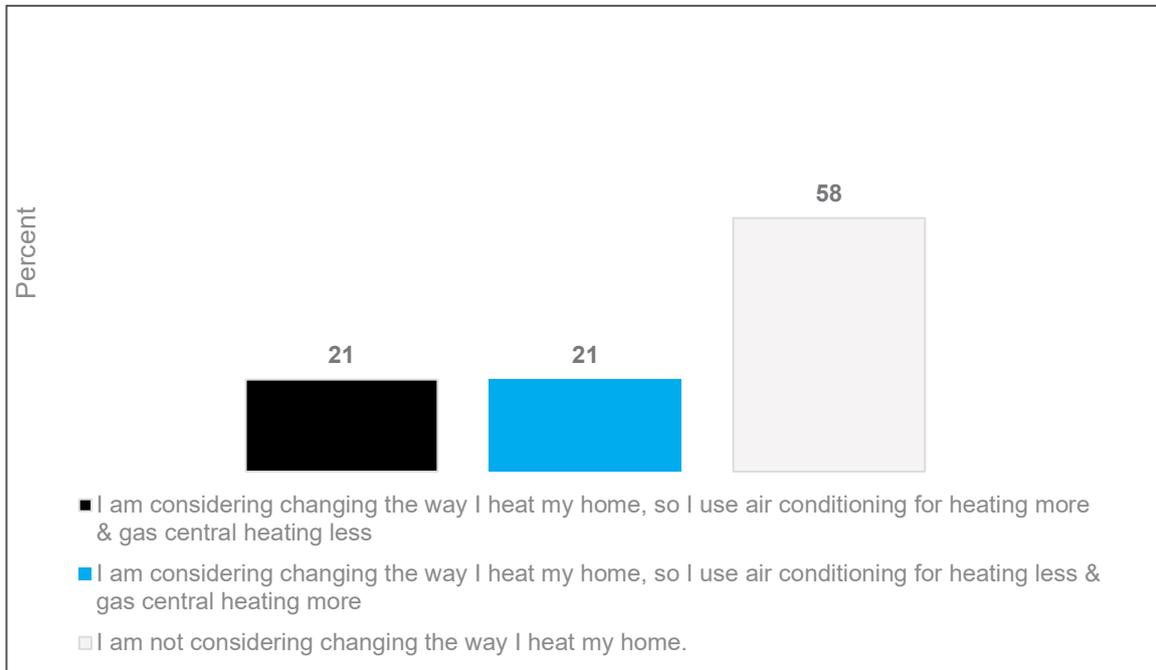
Base: Household consumers with both air conditioning (for cooling & heating) and gas central heating (n=258)

*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 currently considering changing how they heat their home.

- 21% say they are considering using air conditioning more and gas heating less, while the same proportion are thinking about using gas more and air conditioning less.
- 58% 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:



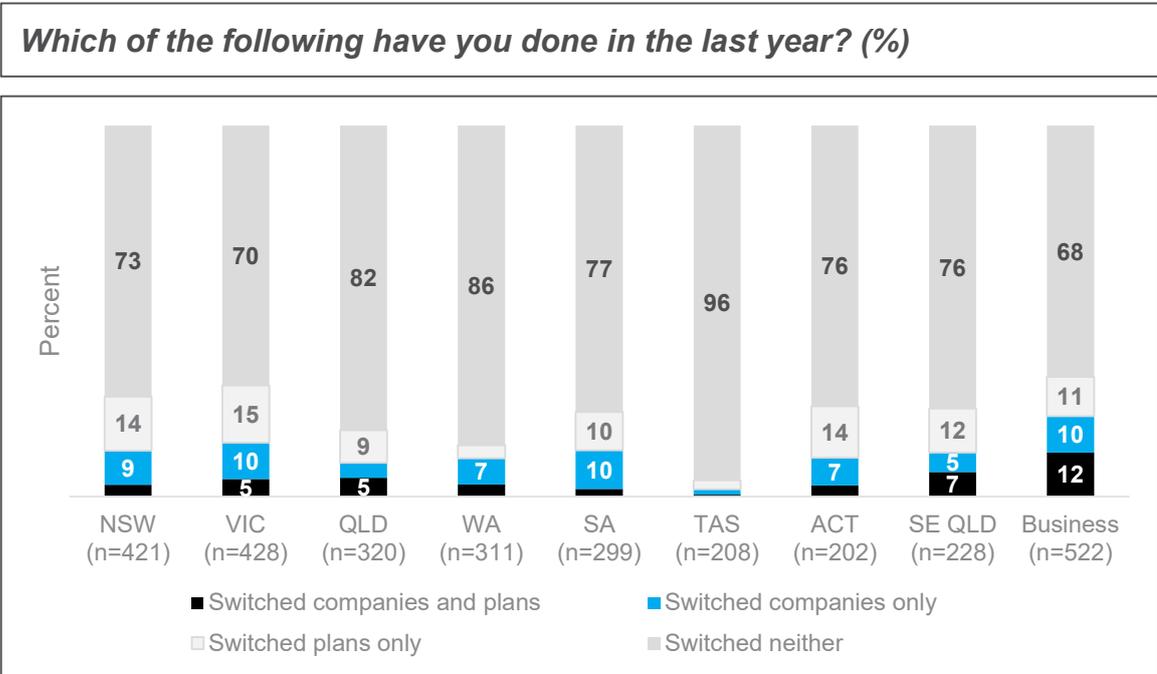
Base: Household consumers with both air conditioning (for cooling & heating) and gas central heating (n=258)

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

Recent switching

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

- The proportion of household consumers that report switching in the past year in deregulated markets varies between 14% (WA) and 30% (VIC).
- Less than 5% of Tasmanians have switched companies or plan since the additional competition became available.
- Small business consumers are most likely to have switched companies or plans in the past year (33%).

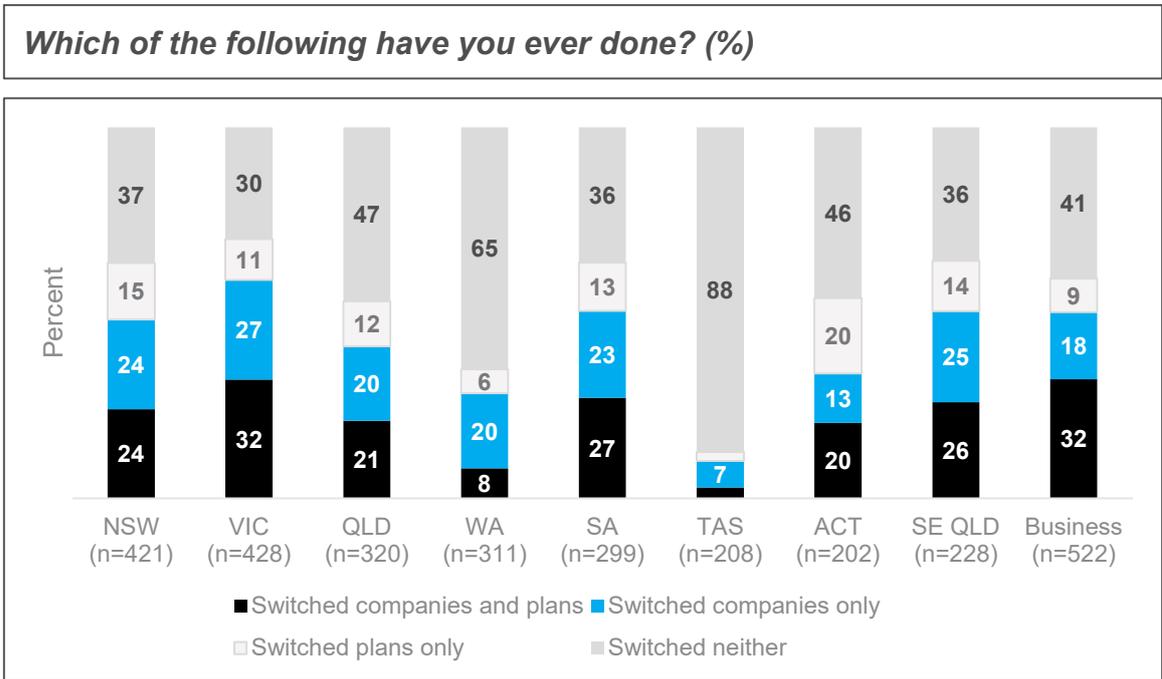


Note: For readability, percentages have been omitted where they are less than 5%

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 (70% have switched plans and/or companies), followed by South Australia (65%) and South East Queensland (63%).



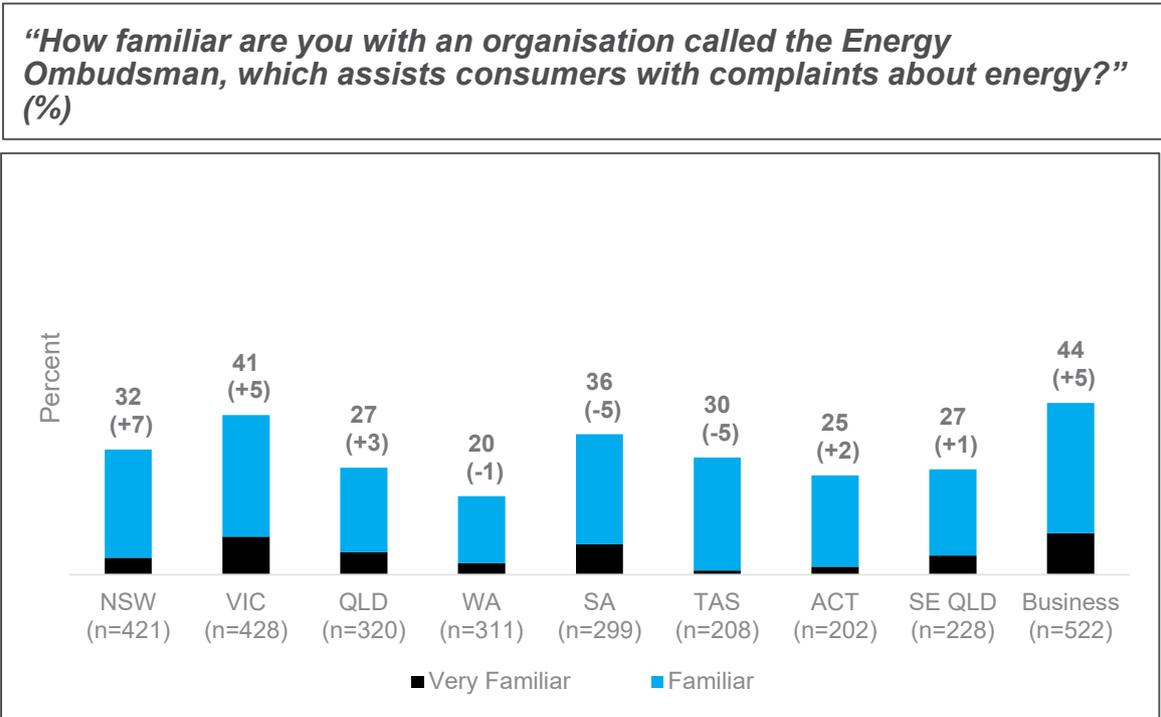
Note: For readability, percentages have been omitted where they are less than 5%

Other

Awareness of the Energy Ombudsman

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

- 44% of small business consumers say they are familiar with the Ombudsman (up 5%).
- 41% of Victorians and 36% of South Australians claim familiarity with their Energy Ombudsman.
- Western Australians are the least aware of their Energy Ombudsman (20%).



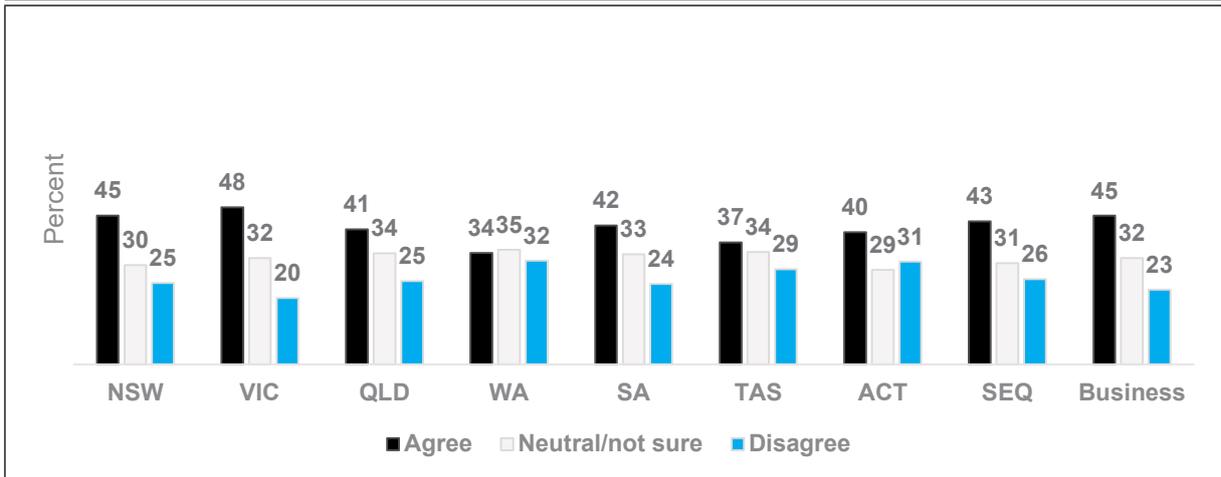
Note: The figure is the aggregate of 'Very Familiar' and 'Familiar'

Communications from energy providers

Less than half of consumers clearly recall the most recent communications from they received energy providers and similar proportions agree that the communications provide important information.

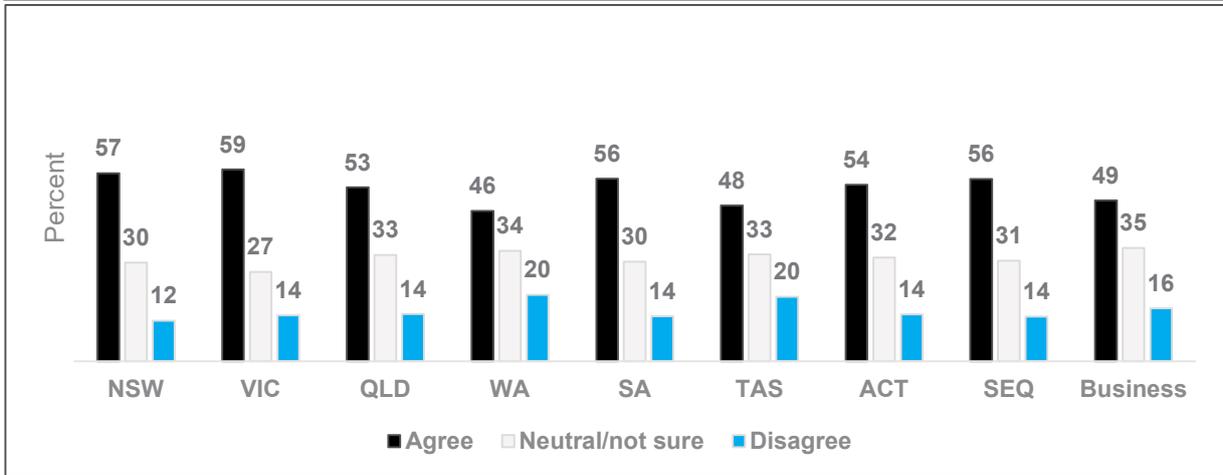
- Less than half of consumers agree that they recall the most recent communications sent to them by their energy company.
- Victoria (48%), New South Wales (45%) and small business consumers (45%) are most likely to agree that they recall the most recent communications.
- Western Australians (34%) are least likely to agree with this statement.

“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=2,216), Small business consumers (n=522)

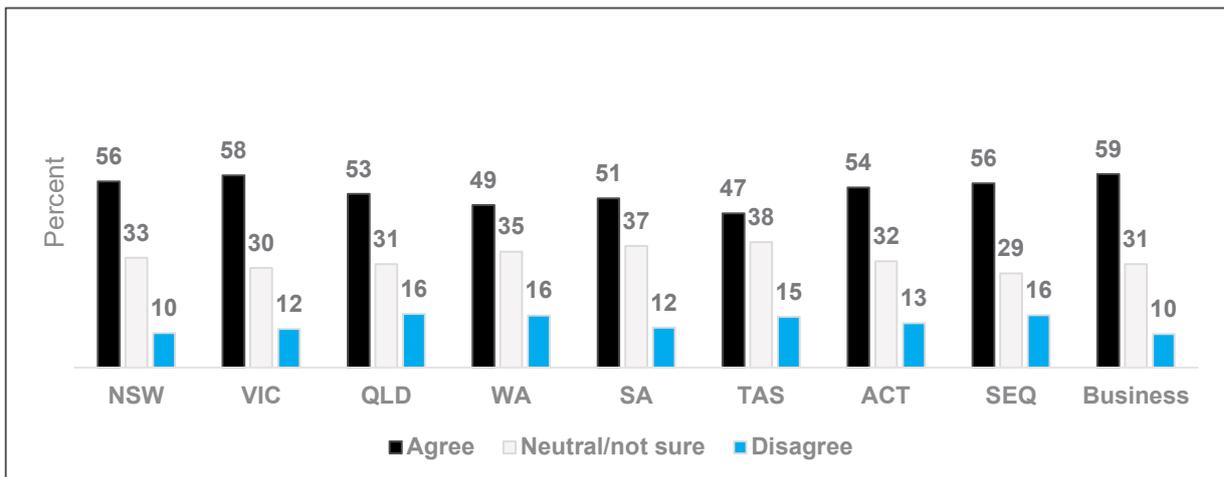
“How strongly do you agree or disagree with the following statements about communication from your energy company? – I usually pay a lot of attention to communications from my energy company (%)”



Base: Household consumers (n=2,216), Small business consumers (n=522)

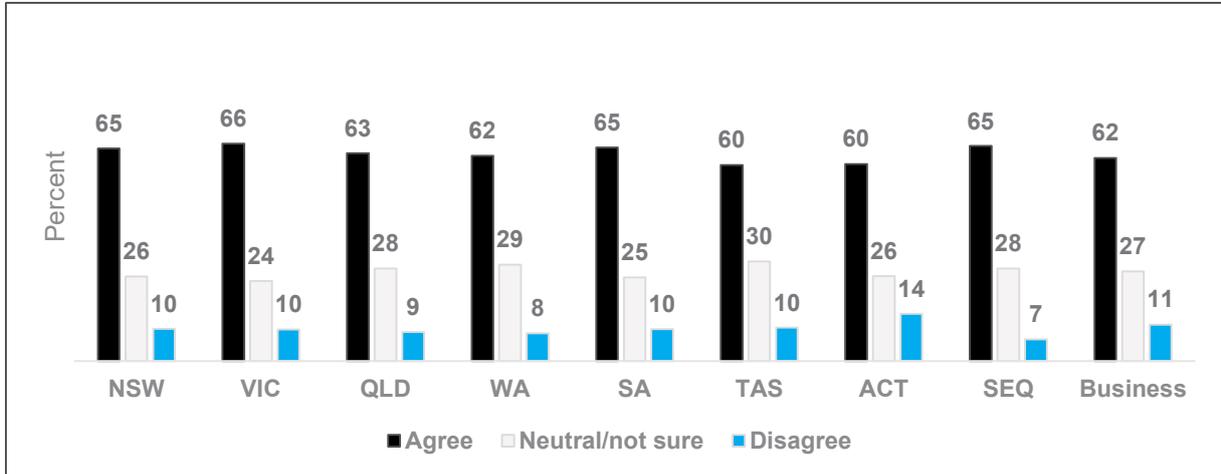
- Only about half of all consumers agree their energy company provides useful information to them.
- A little over one third of consumers do not agree that the communications from their energy company are easy to read.

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



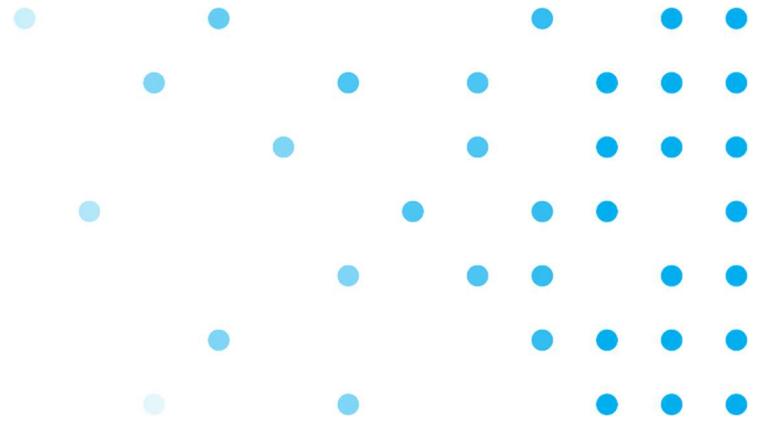
Base: Household consumers (n=2,216), Small business consumers (n=522)

“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=2,216), Small business consumers (n=522)

Small business



Satisfaction

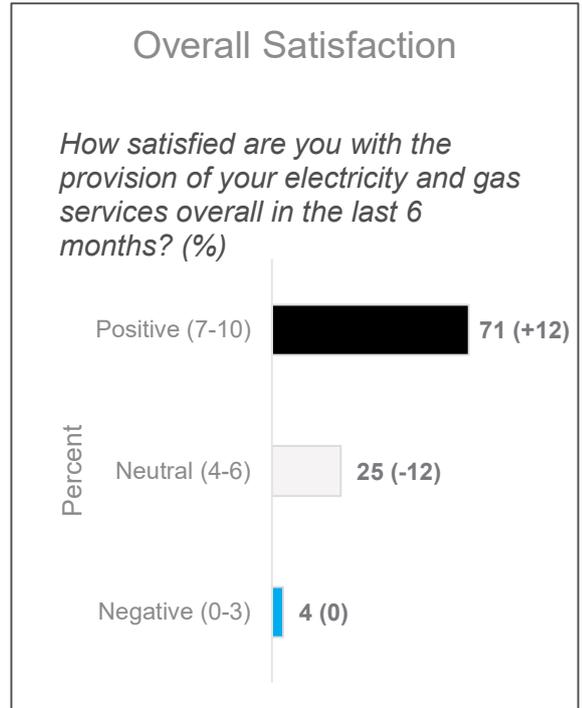
Overall satisfaction

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

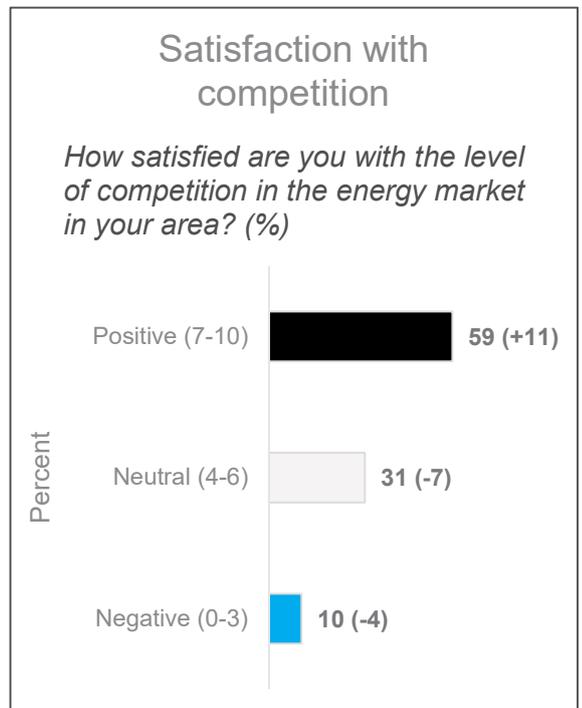
- 71% now say they are satisfied (up 12%).

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

- 59% now report being satisfied with competition in the energy market (up 11%).



Base: Small businesses (n=522)



Base: Small businesses (n=522)

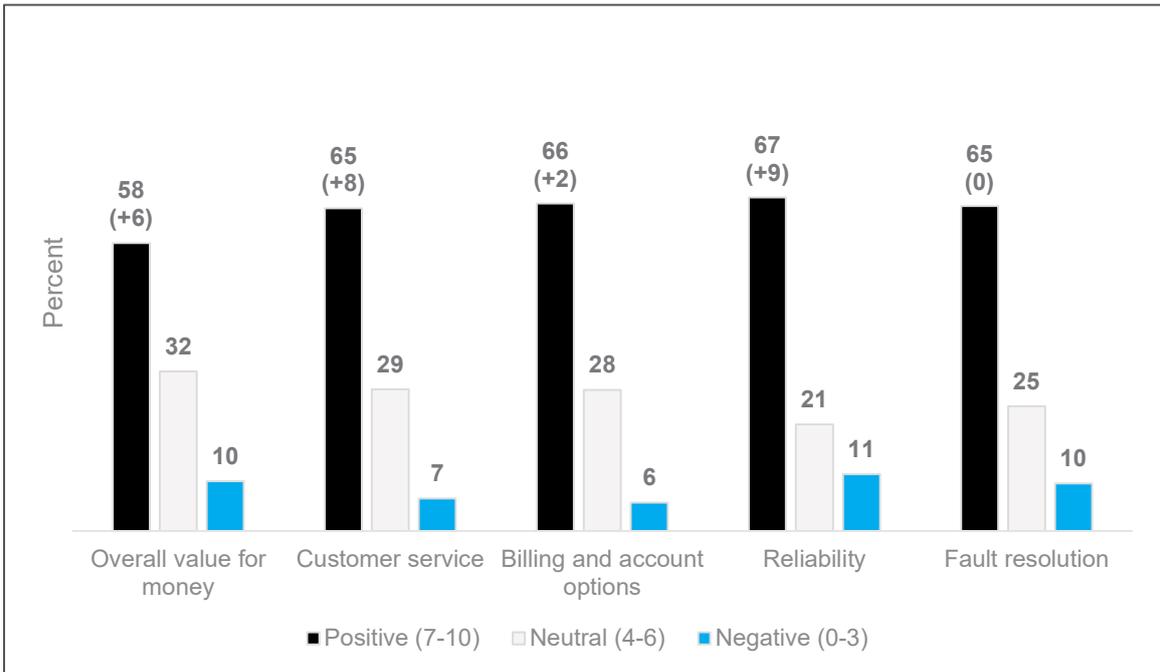
Satisfaction

Satisfaction with electricity

Small business electricity consumers' satisfaction has increased for all measures except fault resolution which is stable.

- Satisfaction with value for money for electricity services increased 6% (to 58%).
- Satisfaction with reliability saw the largest increase from these measures (up 9% to 67%).
- Satisfaction with customer service increased 8% (to 65%).
- For those who experienced a power outage, satisfaction with fault resolution remained stable at 65%.

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



Base: Small businesses with electricity supply (n=522)
Base for fault resolution: Small businesses who rated 0 to 9 satisfaction and had a power outage (n=351)

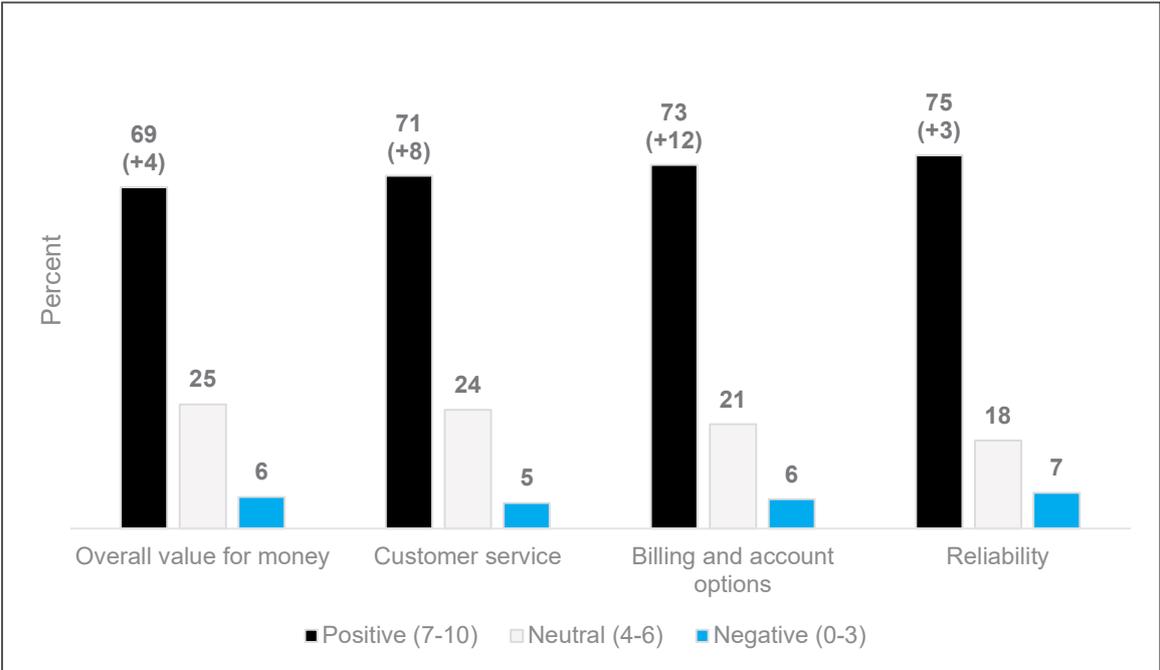
Satisfaction

Satisfaction with gas

Small business gas consumers' satisfaction increased on most measures.

- 69% are satisfied with the overall value for money of their gas service.
- Satisfaction with billing and accounts saw the largest increase in ratings (up 12% to 73%), while satisfaction with customer service increased 8% (to 71%).
- Satisfaction with reliability is at 75%.

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

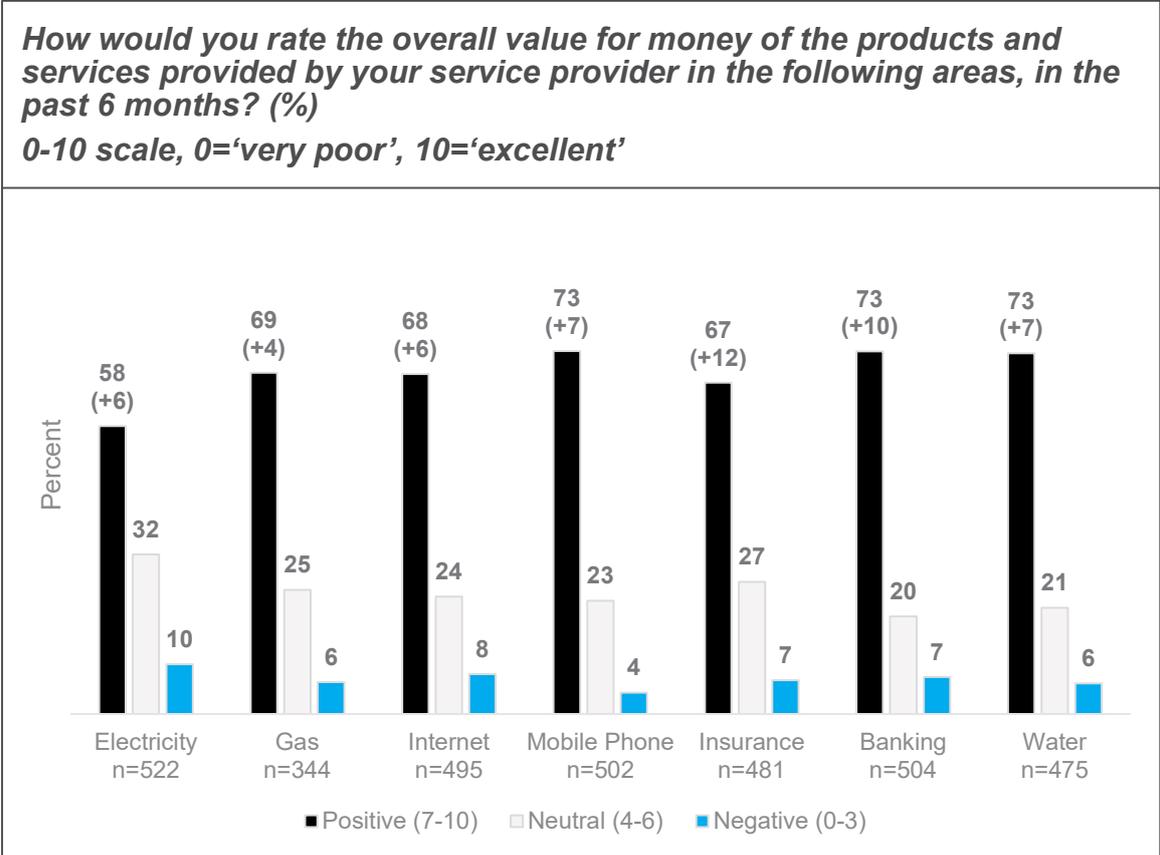


Base: Small businesses with gas supply (n=344)

Satisfaction with utilities and services

Small business consumers' satisfaction with the value for money of utilities and services increased across the board, including electricity and gas.

- 58% now have a positive rating of the value for money of their electricity service (up 6%), but this level of satisfaction continues to lag other utilities and services including gas.
- With a positive rating of 69%, gas service satisfaction is on par with other utilities and services.



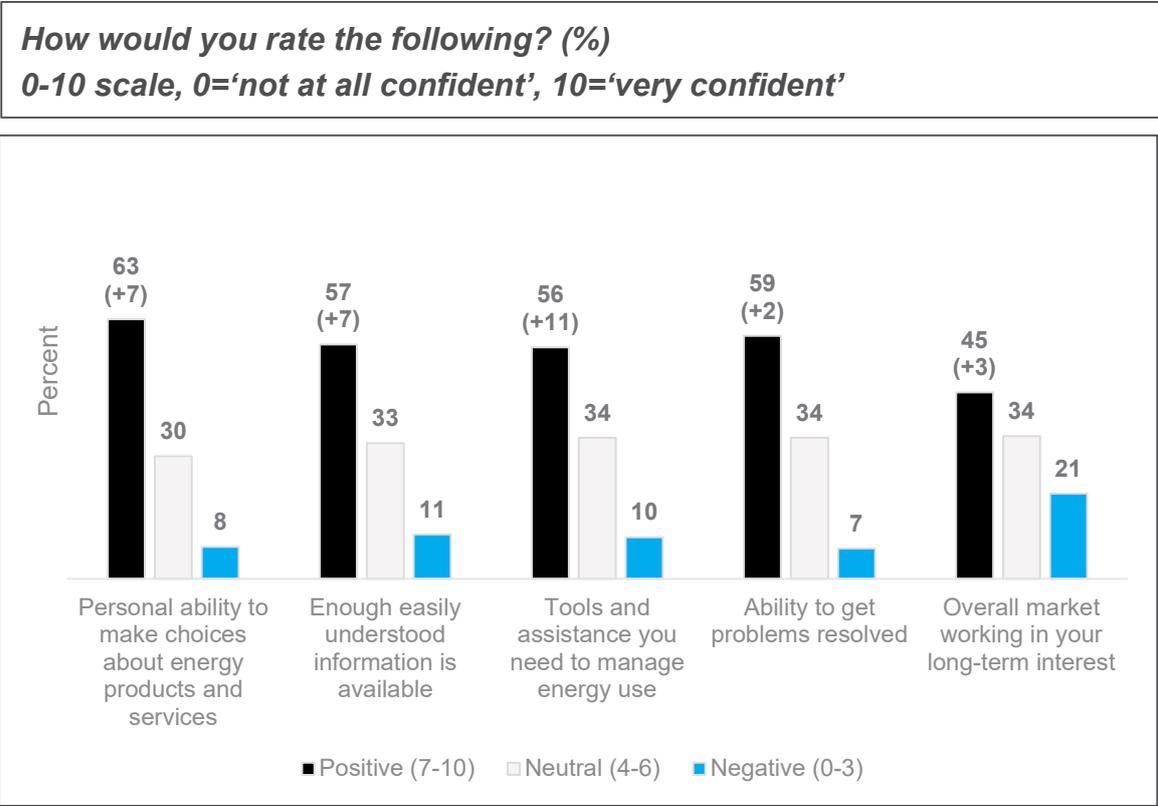
Base: Small businesses with these services

Confidence

Confidence in information, tools and a working market

Despite generally increasing confidence in the market, still less than half of small business consumers are confident that the overall market is working in their long-term interests.

- Small business consumers' confidence that they have the tools to manage their energy usage is up 11% (to 56%).
- 57% of small businesses think clear information is available (up 7%).



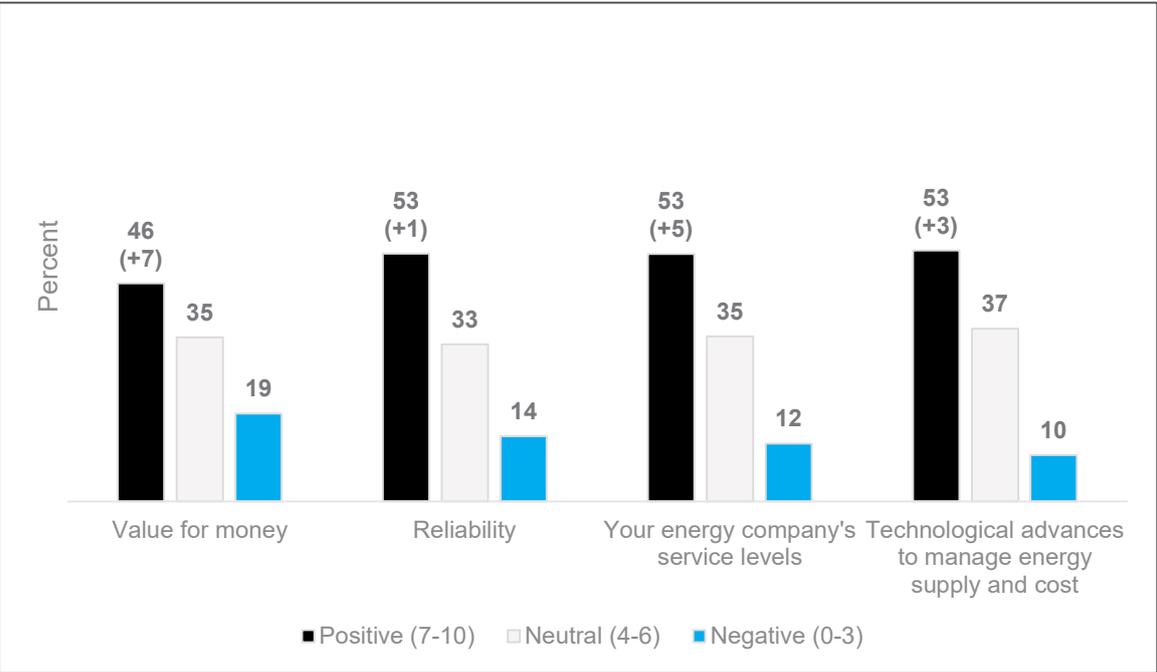
Base: Small businesses (n=522)

Confidence in long-term outcomes

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

- The proportion of small businesses which are confident that the market will deliver better value for money in the long term is up 7% from last year (to 46%).
- More than half of small business consumers are now positive about future reliability, customer service and technological advancement (all 53%), but confidence in future value for money continues to sit well below other metrics.

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'

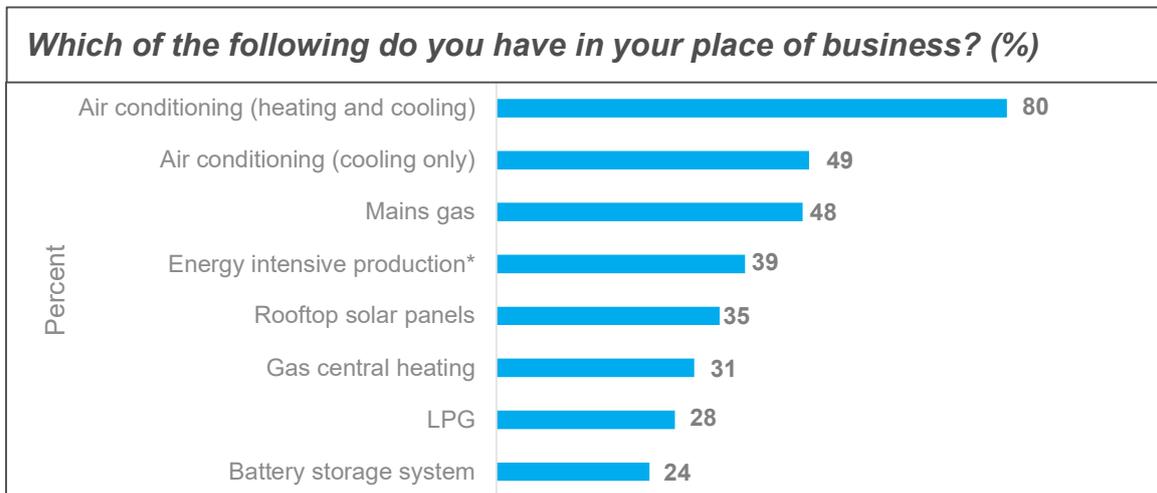


Base: Small businesses (n=522)

Uptake of technologies

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

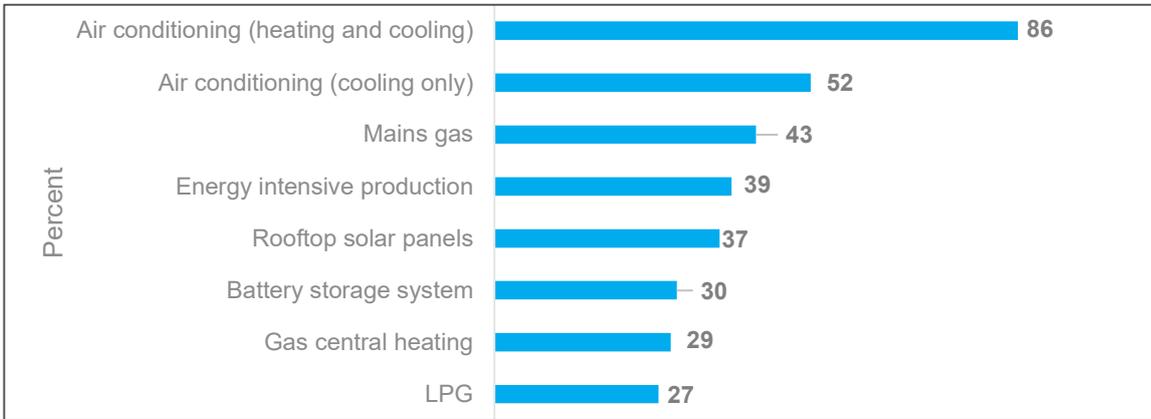
- 58% of small business consumers say they have a digital/smart meter. This is the same proportion as June 2019, but 40% now say they use it to control energy costs (up 10%).
- 38% say they have a smart thermostat, and 25% say they use one to control their energy costs.
- 35% say they have rooftop solar panels.



Base: Small business consumers (n=522)

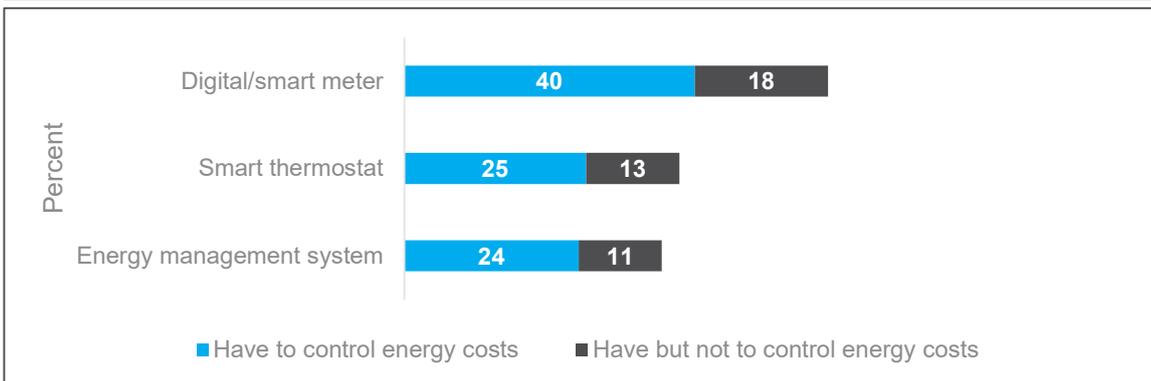
*Energy intensive production is only asked of businesses working from a fixed location (n=285)

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



Base: Small business consumers operating from a fixed location (n=285)

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

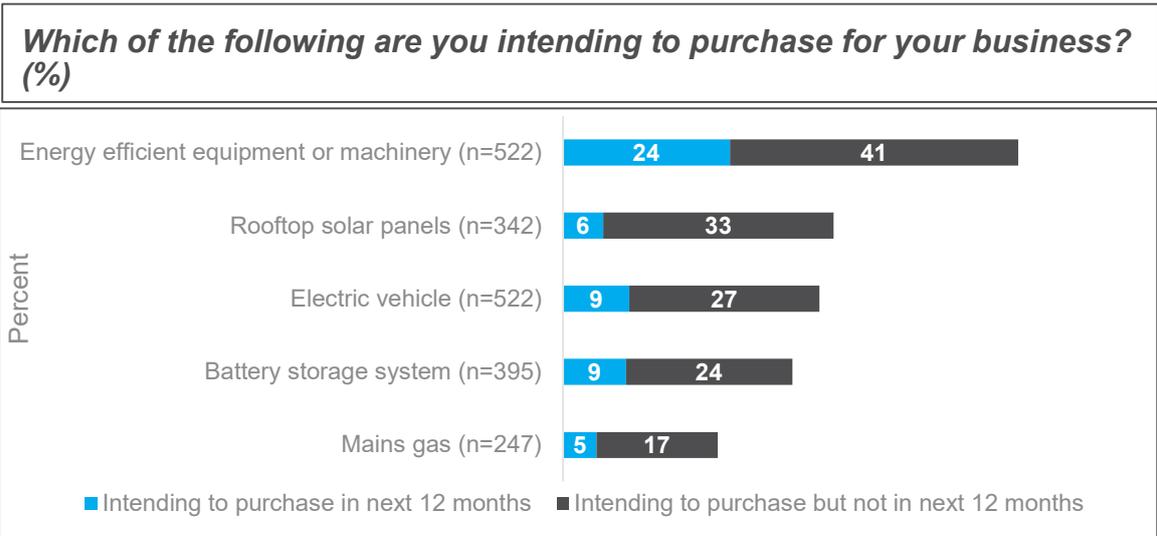


Base: Small business consumers (n=522)

Future uptake of technologies

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

- 65% say they intend to purchase energy efficient equipment or machinery for their business, and the proportion who say they plan to do so in the next 12 months is up 8% (to 24%).
- 39% of small businesses who do not currently have solar panels say they plan to purchase them, and 6% intend to do so in the next 12 months.
- 36% of small businesses say they plan to purchase an electric vehicle, and 9% intend to do so in the next 12 months.
- 33% of small businesses who do not currently have battery storage say they intend to purchase a system, and 9% intend to do to so in the next 12 months.



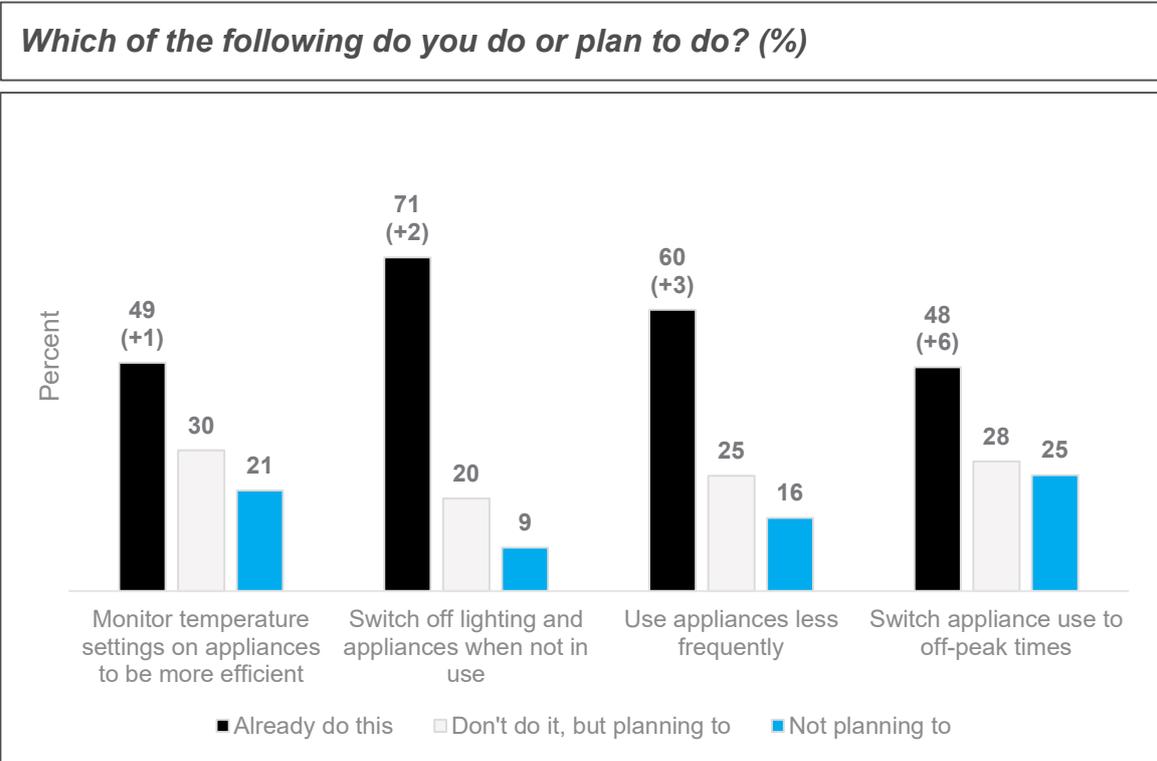
Base: Small business consumers (n=522)

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

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

- A majority of small businesses say they switch off lighting and appliances when not in use (71%) and use appliances less frequently (60%).
- 49% say they already monitor temperature settings on appliances and 48% say they switch appliance use to off-peak times (up 6%).
- The proportion of small business consumers saying they are not planning to undertake energy use reduction measures decreased across the board.



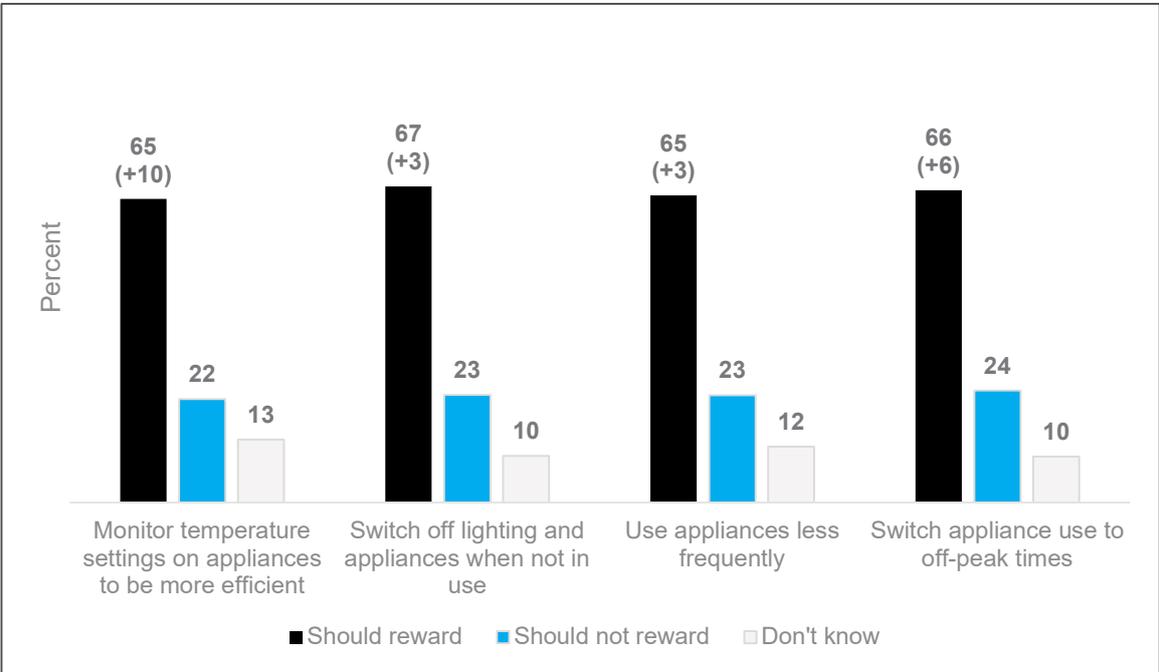
Base: Small businesses (n=522)

Reward for reducing energy use

A growing majority of small business consumers think customers should be rewarded for acting to reduce their energy usage.

- The proportion of small business consumers in favour of rewarding energy efficiency are similar across each of the measures tested.
- 67% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use.
- 66% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 6%).
- 65% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 10%).
- 65% 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: (%)

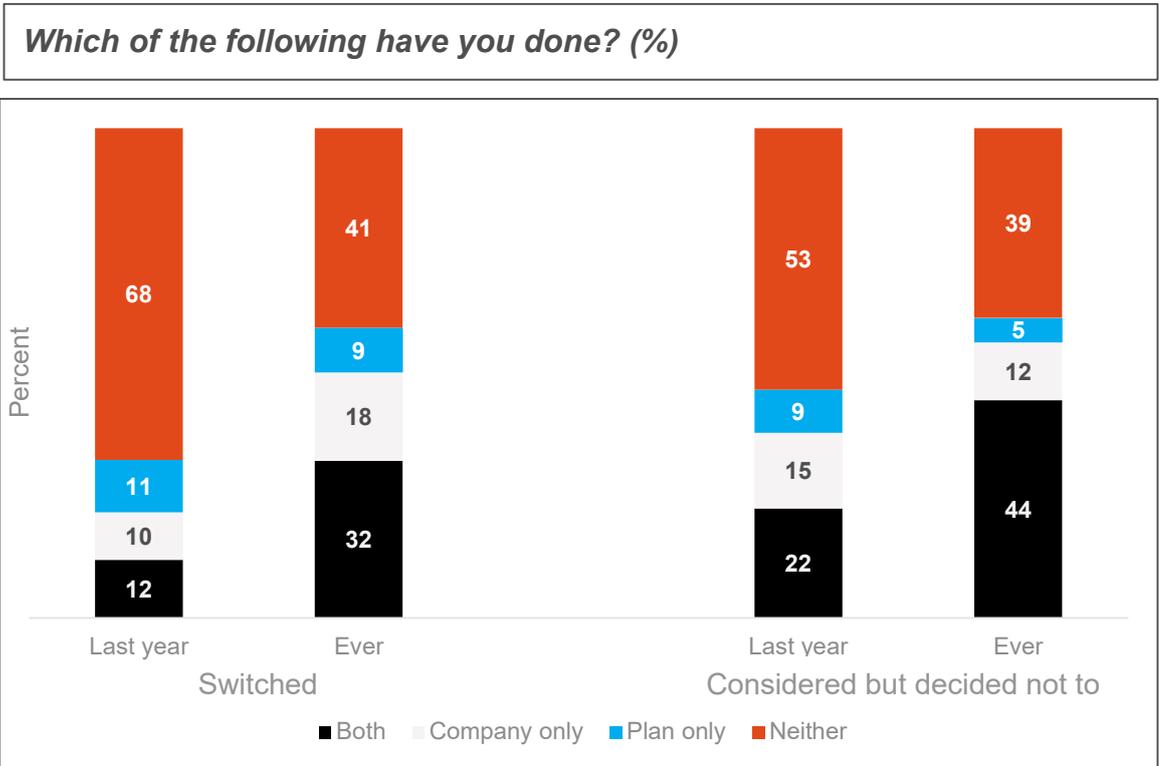


Base: Small businesses (n=522)

Switching behaviour

A third of small businesses report having switched plan and/or company in the past year.

- 41% say they have never switched energy companies or plans.
- 46% say they considered switching plan and/or company in the past year but decided not to.



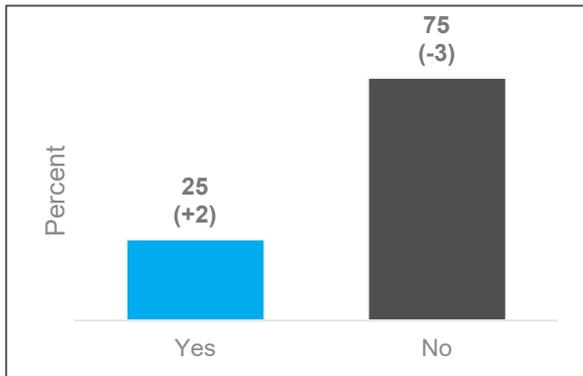
Base: Small businesses (n=522)

Reasons for considering switching

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

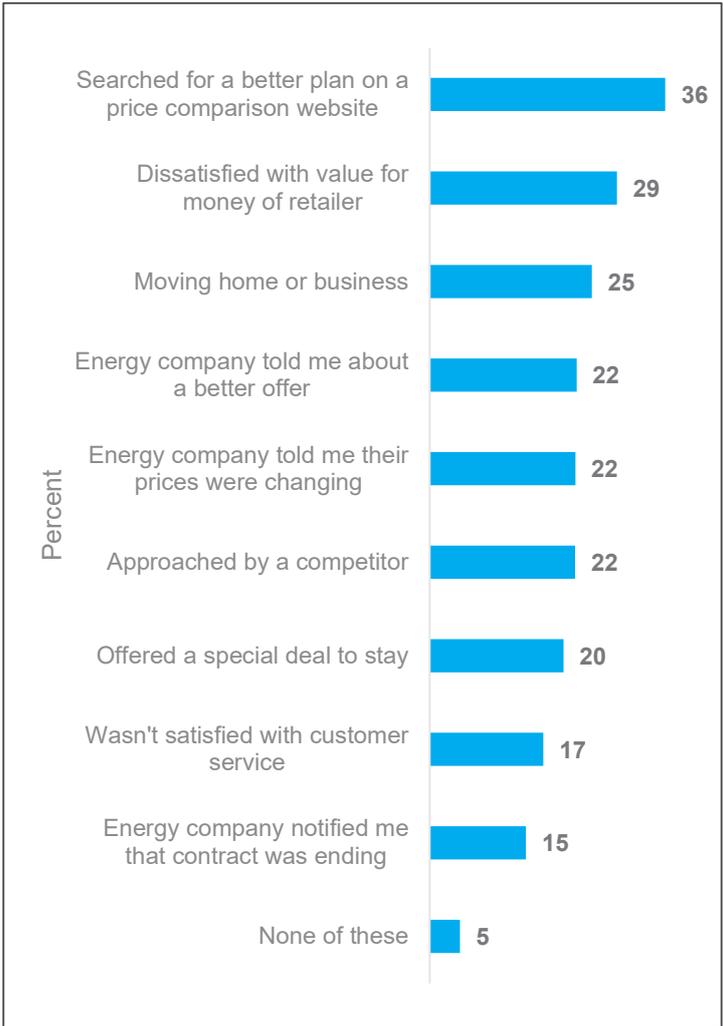
- 36% said that they looked for a better plan on a price comparison website the last time they looked at switching energy companies.
- 25% intend to switch energy companies in the next year.

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



Base: Small businesses (n=522)

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=361)

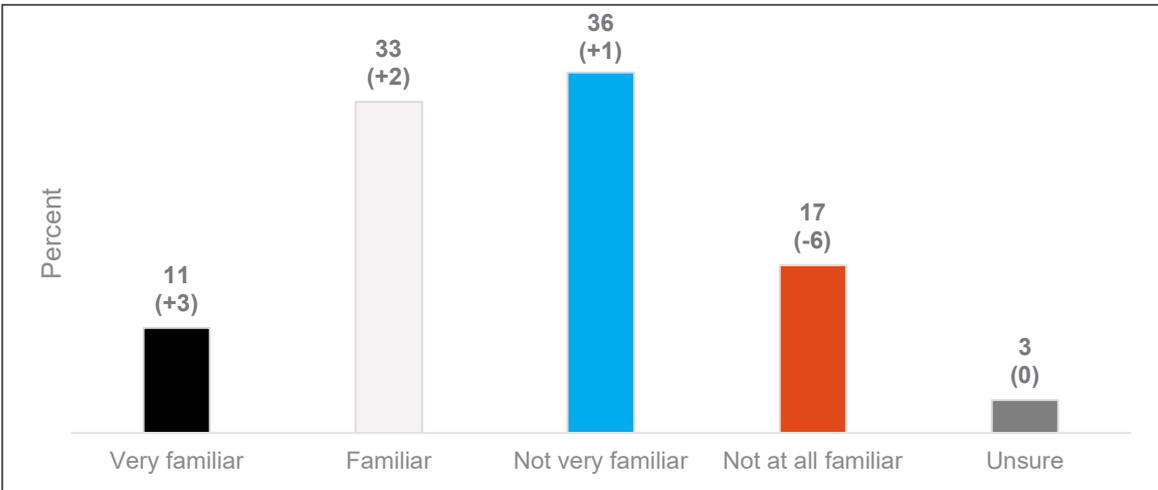
Other

Awareness of the Energy Ombudsman

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

- 44% of small business consumers claim to be familiar with the Ombudsman (up 5%).

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



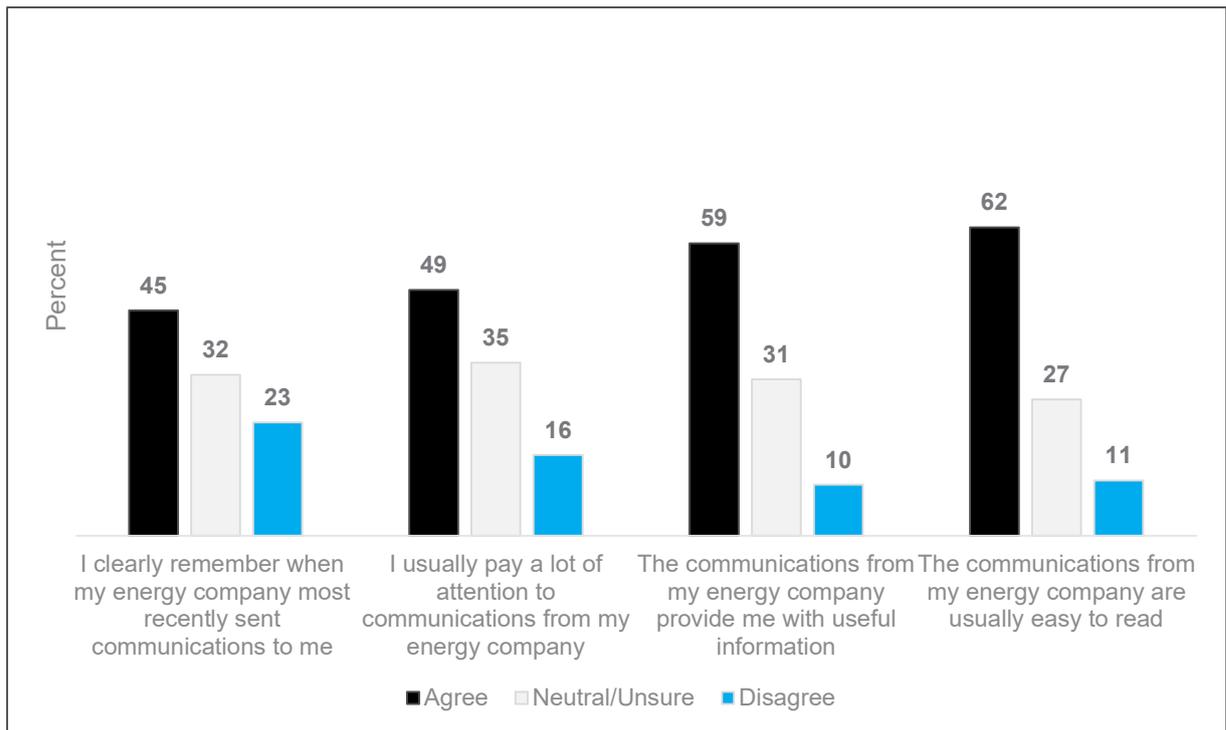
Base: Small businesses (n=522)

Communications from energy providers

Less than half of small business consumers can recall the most recent communication from their energy company.

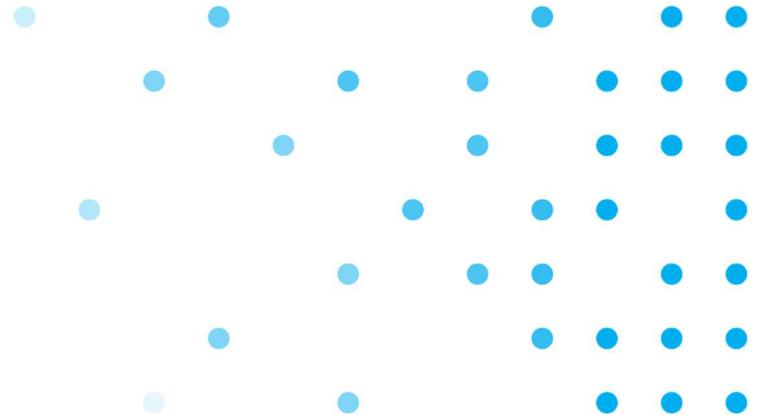
- Only 62% of small businesses agree that communications from their energy company are easy to read.
- Only 59% agree that the communications are provide useful information.
- 49% agree that they usually pay a lot of attention to communication from their energy company.
- Less than half (45%) agree that they recall the most recent communication from their energy company, with 23% disagreeing.

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



Base: Small businesses (n=522)

New South Wales





Overall satisfaction

Satisfaction with energy services among NSW household consumers has increased.

- 79% are satisfied (up 15%).

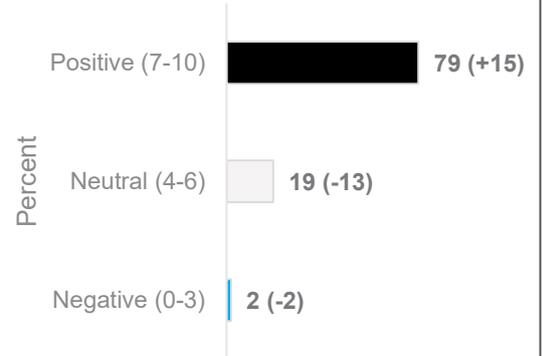
Satisfaction with the level of competition has also gone up.

- 61% say they are satisfied with the level of competition (up 13%).

Satisfaction

Overall Satisfaction

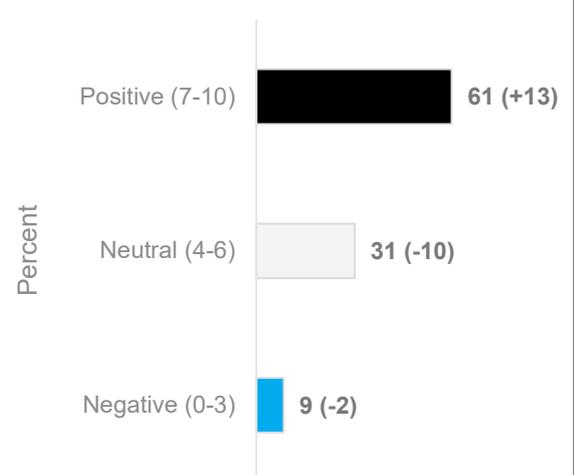
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in NSW (n=421)

Satisfaction with competition

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



Base: Consumers in NSW (n=421)

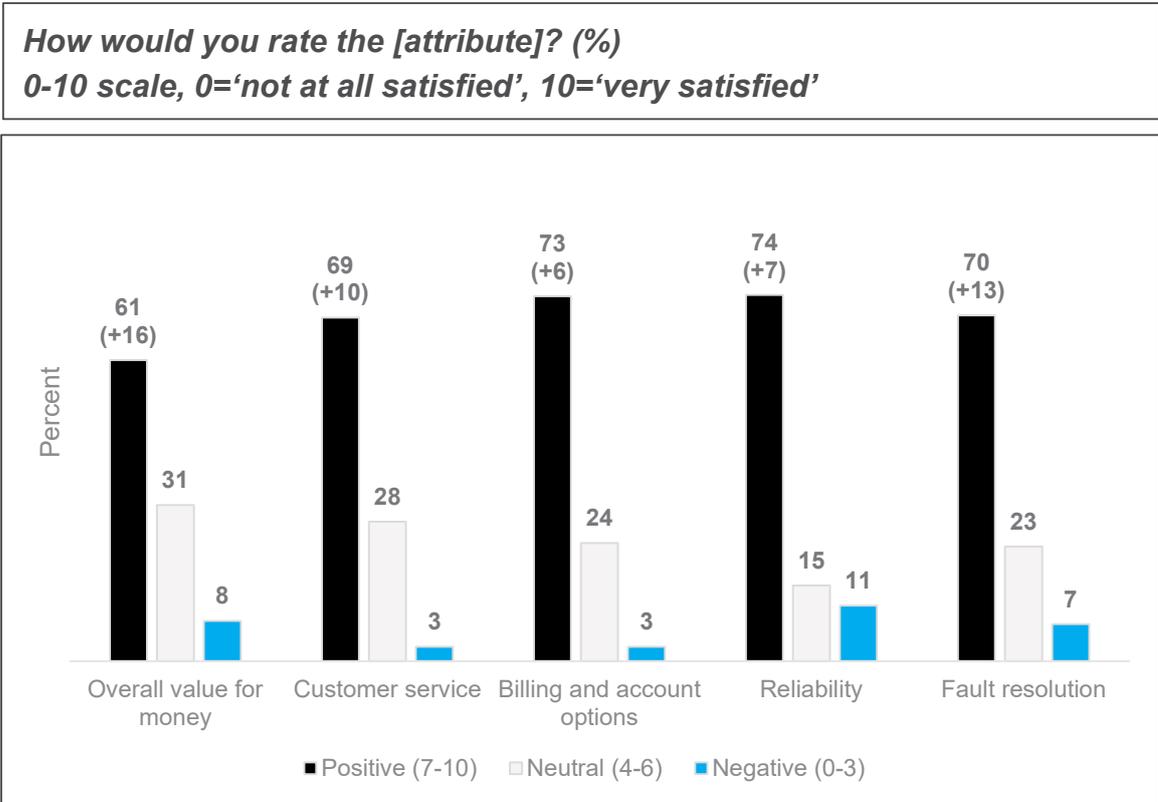


Satisfaction

Satisfaction with electricity

The satisfaction of household electricity consumers in NSW increased across all measures – particularly overall value for money.

- Satisfaction has increased the most for overall value for money (up 16% to 61%), fault resolution (up 13% to 70%) and customer service (up 10% to 69%).
- Satisfaction with reliability increased by 7% (to 74%) and is still the highest rated metric.



Base: Consumers in NSW with electricity supply (n=421)
Base for fault resolution: Those in NSW who rated 0 to 9 satisfaction and had a power outage (n=230)



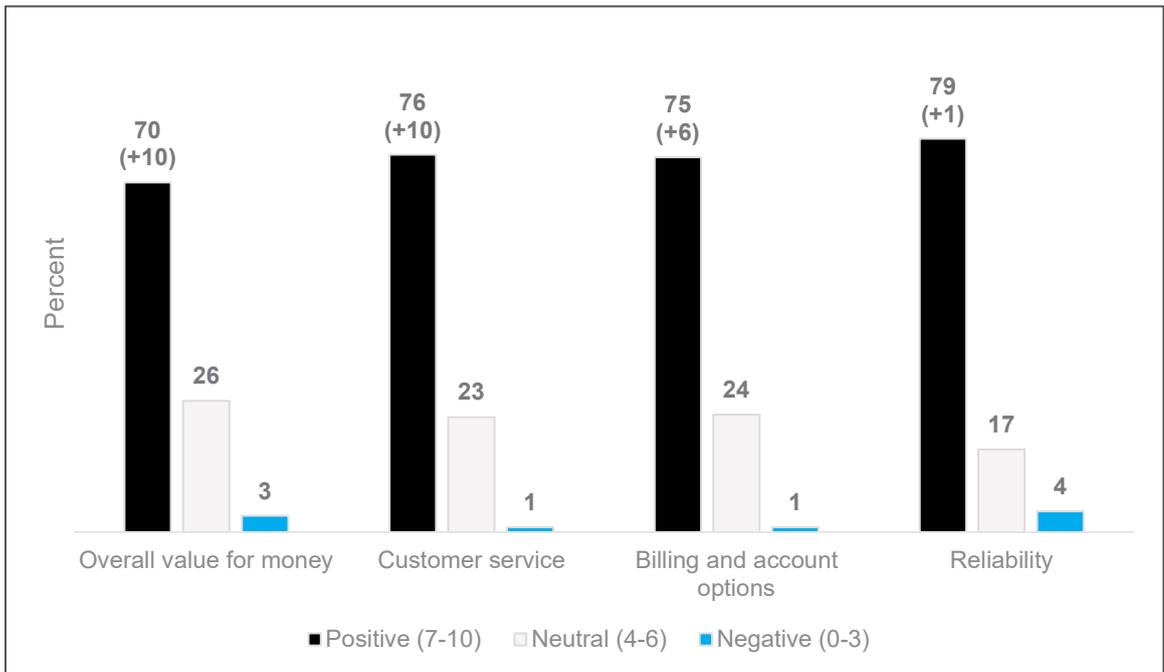
Satisfaction

Satisfaction with gas

NSW household consumers' satisfaction with gas services has also increased across all measures.

- 70% are satisfied with the value for money of their gas service (up 10%).
- 76% are satisfied with their gas company's customer service (up 10%).
- 75% are satisfied with their billing and account options (up 6%).
- 79% are satisfied with reliability of their service.

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=216)

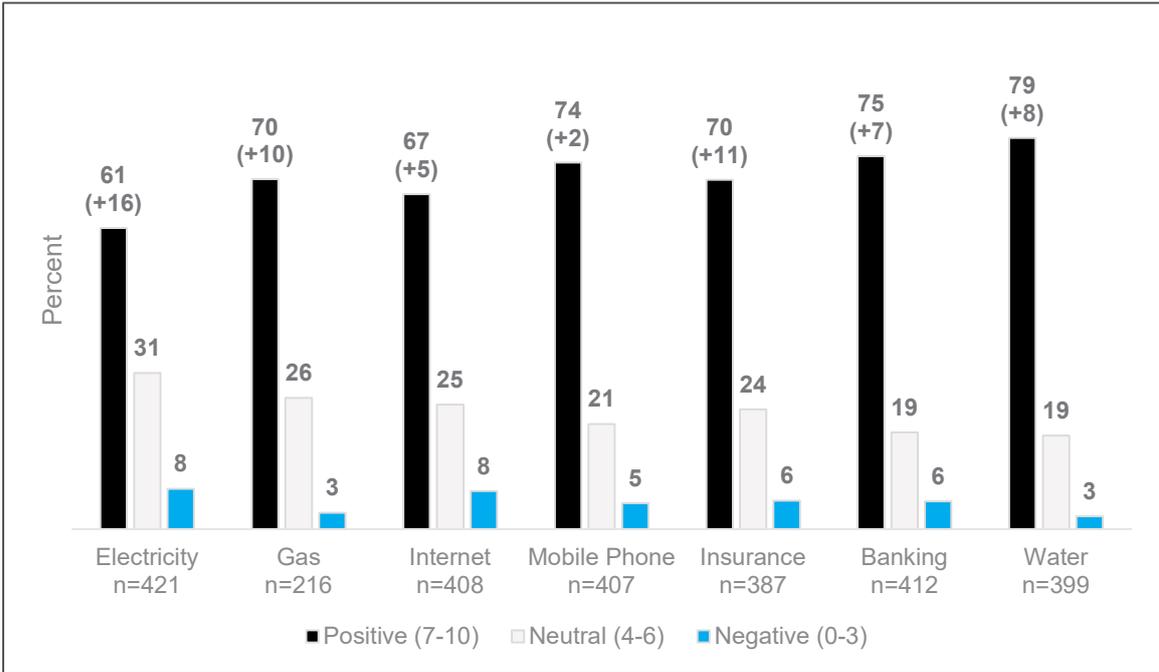


Satisfaction with utilities and services

NSW household consumers are more satisfied with their electricity services than last year, but it still has the lowest value for money satisfaction rating.

- Households' satisfaction with their electricity service has increased 16% (to 61%), but this is still behind the next lowest-rated utility – internet (67%).
- Satisfaction with gas services has increased 10% (to 70%) and is now on par with insurance.

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

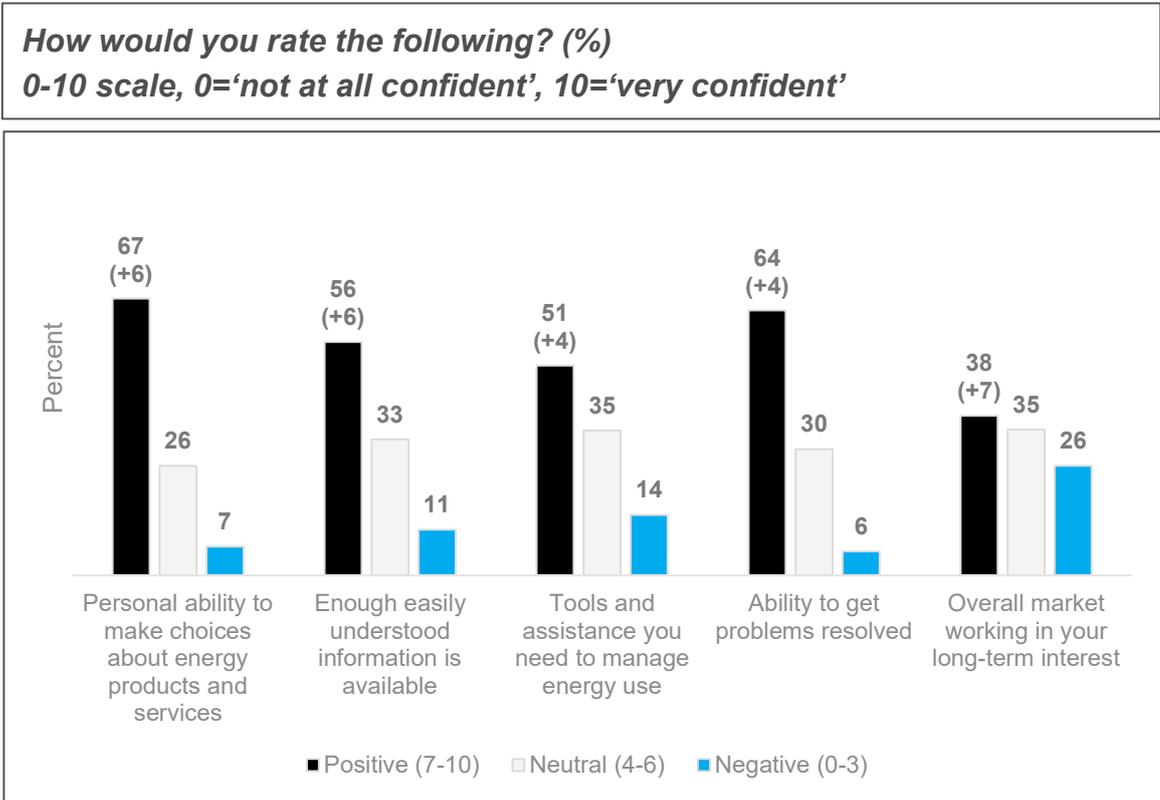


Confidence

Confidence in information, tools and a working market

Confidence among NSW consumers has increased for all measures, but few agree the market is working in their interests.

- 38% of NSW household consumers are confident that the overall market is working in their long-term interests (up 7%).
- 67% are now confident in their personal ability to make choices about energy products and services, and 56% are confident there is enough easily understood information available (both up 6%).
- 64% are confident in their ability to get problems resolved, and 51% are confident there are tools and assistance to help consumers manage their energy usage.



Base: Consumers in NSW (n=421)



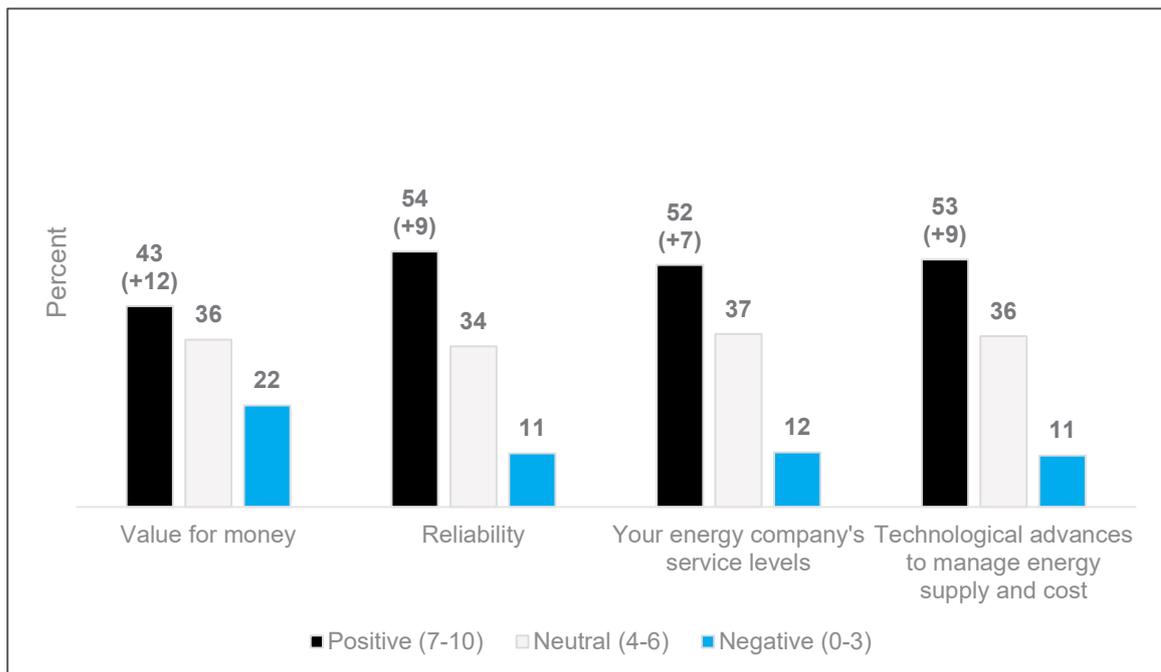
Confidence in long term outcomes

Consumer confidence in long term outcomes has increased off a low base but confidence in future value for money continues to lag other measures.

- 43% of NSW household consumers say they are confident that value for money outcomes will improve in the future (up 12%).
- 54% say they are confident in the reliability of their energy service improving (up 9%).
- 52% say they are confident their energy company's service levels will improve in the future (up 7%).
- 53% say they are confident in the likelihood of future technological advances to manage energy supply and costs (up 9%).

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'



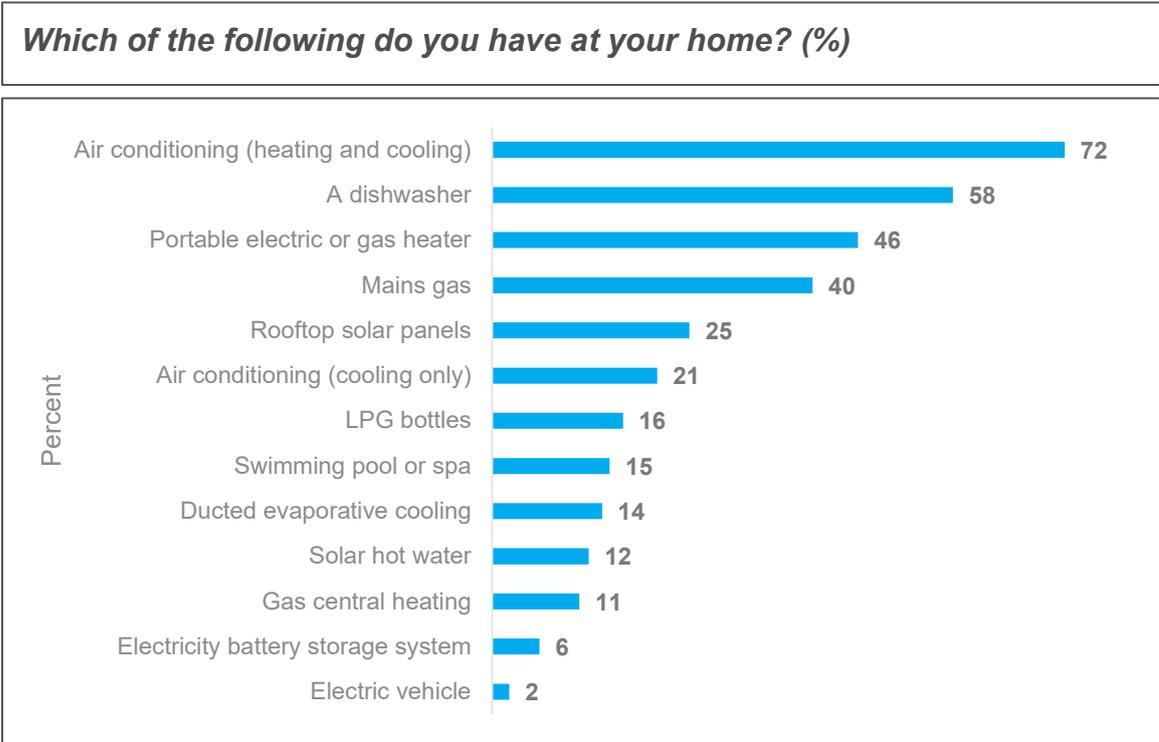
Base: Consumers in NSW (n=421)



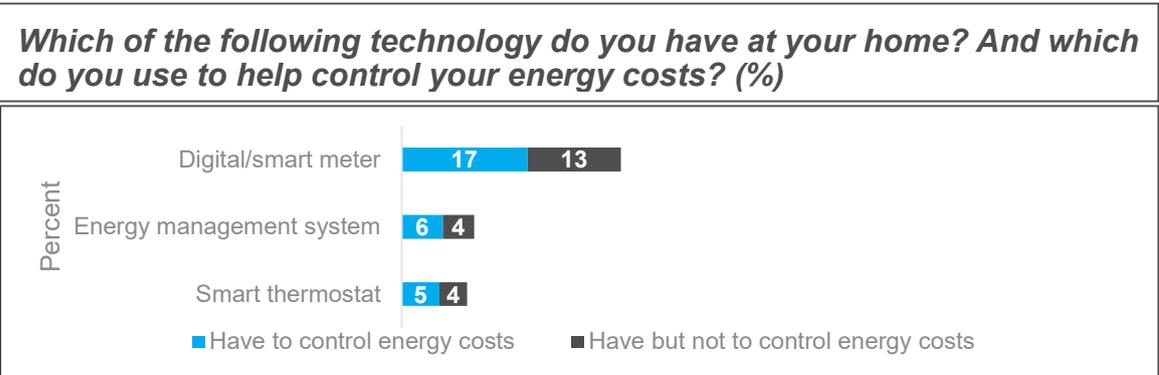
Uptake of technologies

NSW households report increasing use of digital meters to control energy costs.

- 30% say they have a digital/smart meter (up 10%), and over half of these consumers use it to manage their energy use and costs (17%).
- One in ten consumers in NSW now report having an energy management system (10%) or smart thermostat (9%).



Base: Consumers in NSW (n=421)



Base: Consumers in NSW (n=421)

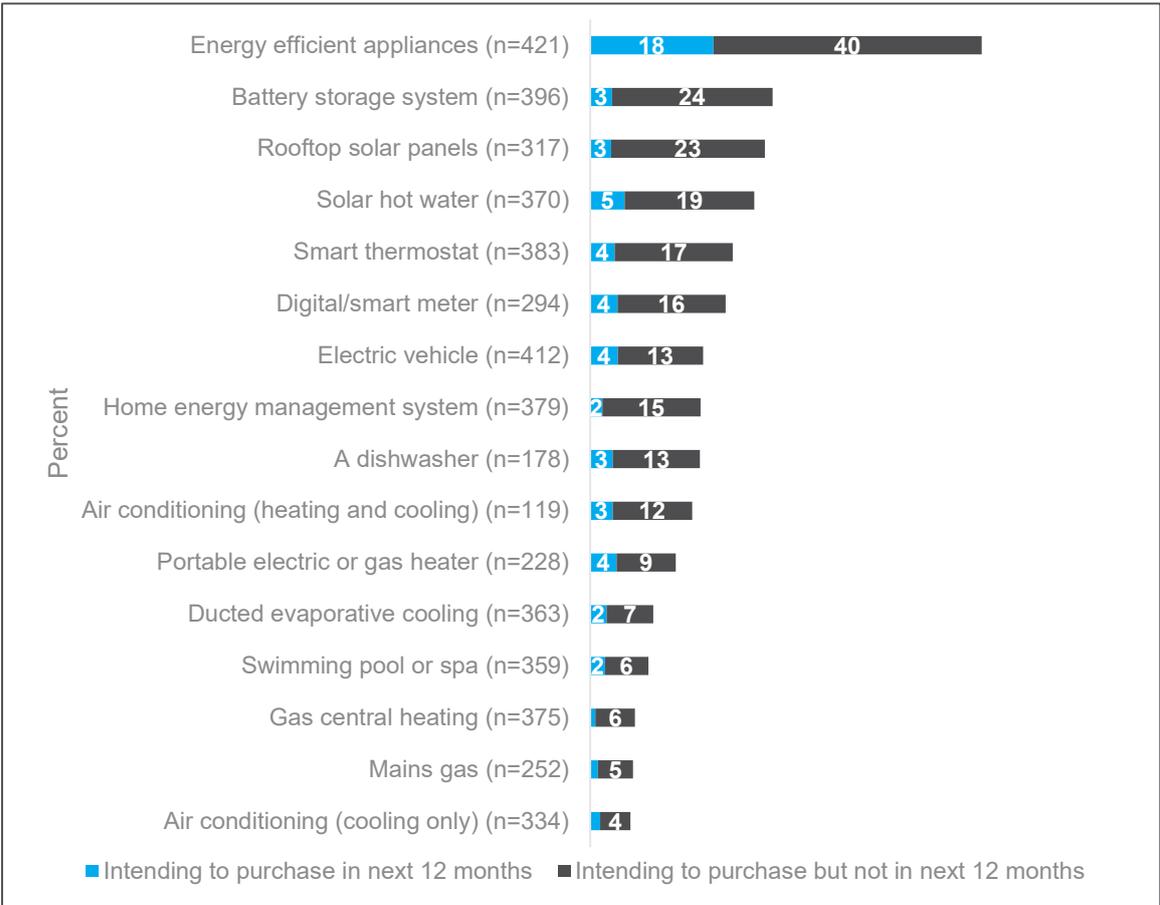


Future uptake of technologies

NSW household consumers indicate increasing interest in purchasing energy efficient appliances in the next 12 months, but few plan to buy other energy technologies.

- The proportion intending to purchase energy efficient appliances is steady at 58%, with 18% now planning to do so in the next 12 months (up from 14%).
- Of those who do not already have rooftop solar, 26% say they intend to install solar panels (3% in the next 12 months), and 27% of those without battery storage plan to purchase a system (3% in the next 12 months).
- Of the households who report having solar panels, 52% have expressed interest in adding electricity battery storage systems to their homes.

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

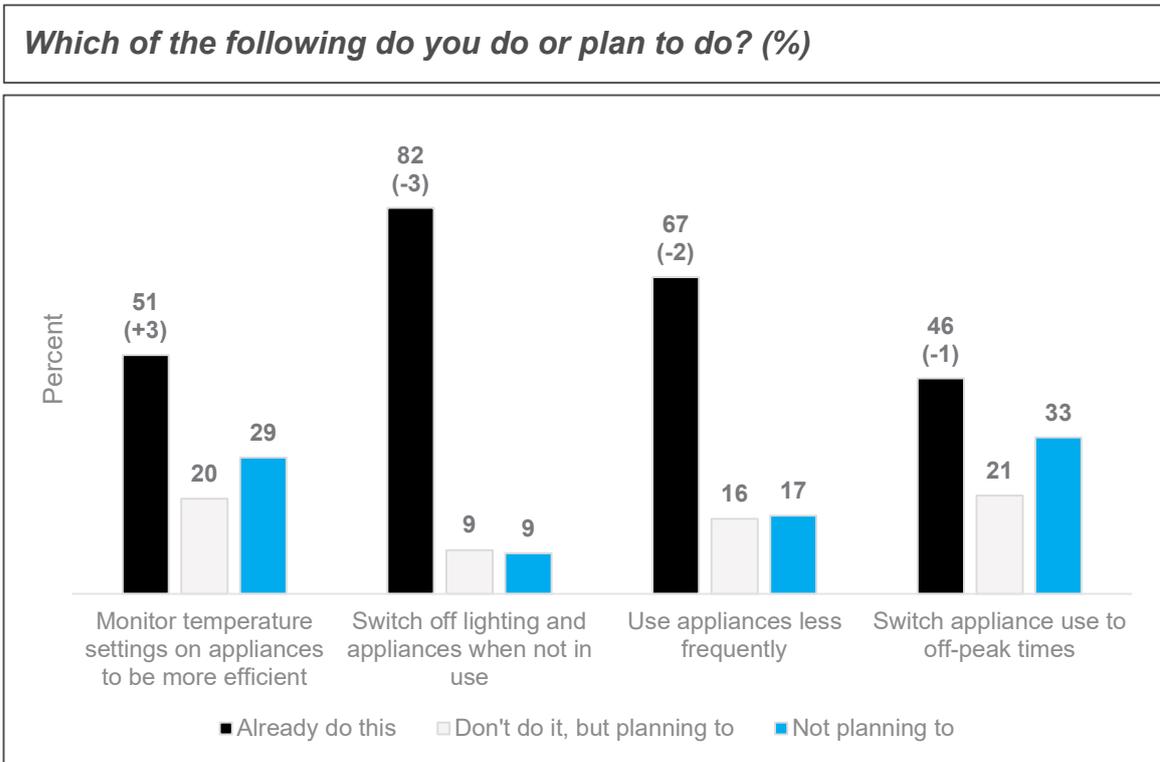
Note: For readability, percentages have been omitted where they are less than 2%



Energy saving practices

The proportion of NSW household consumers who say they are already undertaking energy saving practices is steady.

- 82% say they already switch off lighting and appliances when not in use.
- 67% say they already use appliances less frequently to conserve energy.
- 51% say they monitor temperature settings on appliances to be more efficient.
- 46% say they already switch appliance use to off-peak times.



Base: Consumers in NSW (n=421)

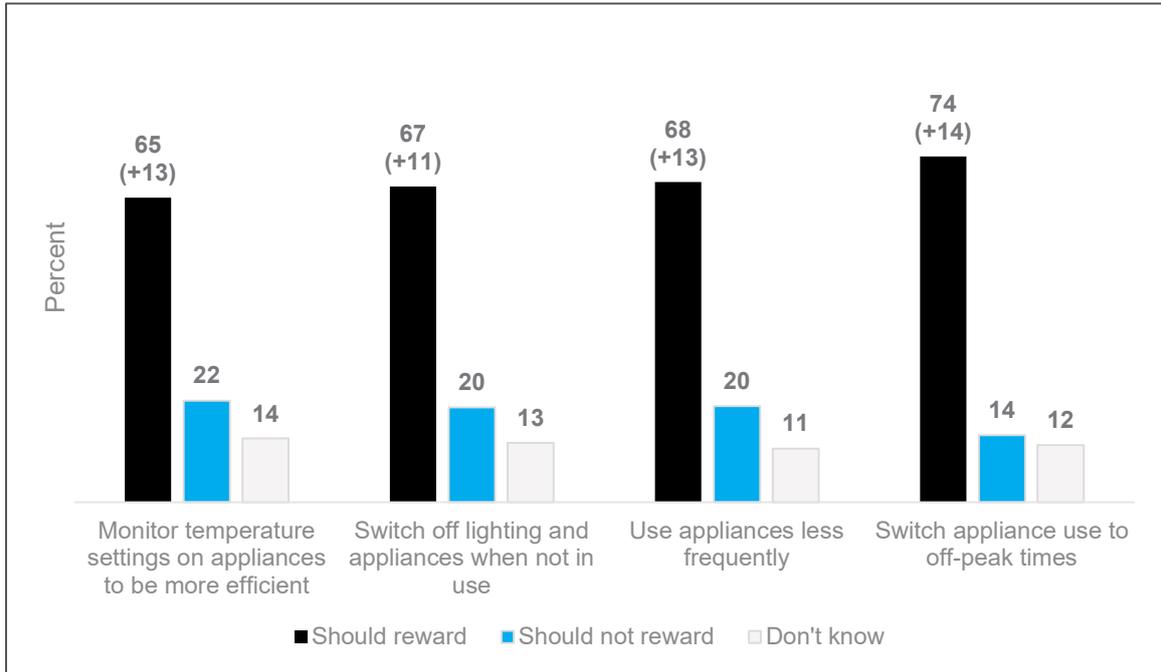


Reward for reducing energy use

A growing 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.

- 74% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (up 14%).
- 68% think electricity companies should do more to financially reward customers who use appliances less frequently (up 13%).
- 67% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (up 11%).
- 65% think electricity companies should do more to financially reward customers who monitor temperature settings on appliances to be more efficient (up 13%).

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



Base: Consumers in NSW (n=421)

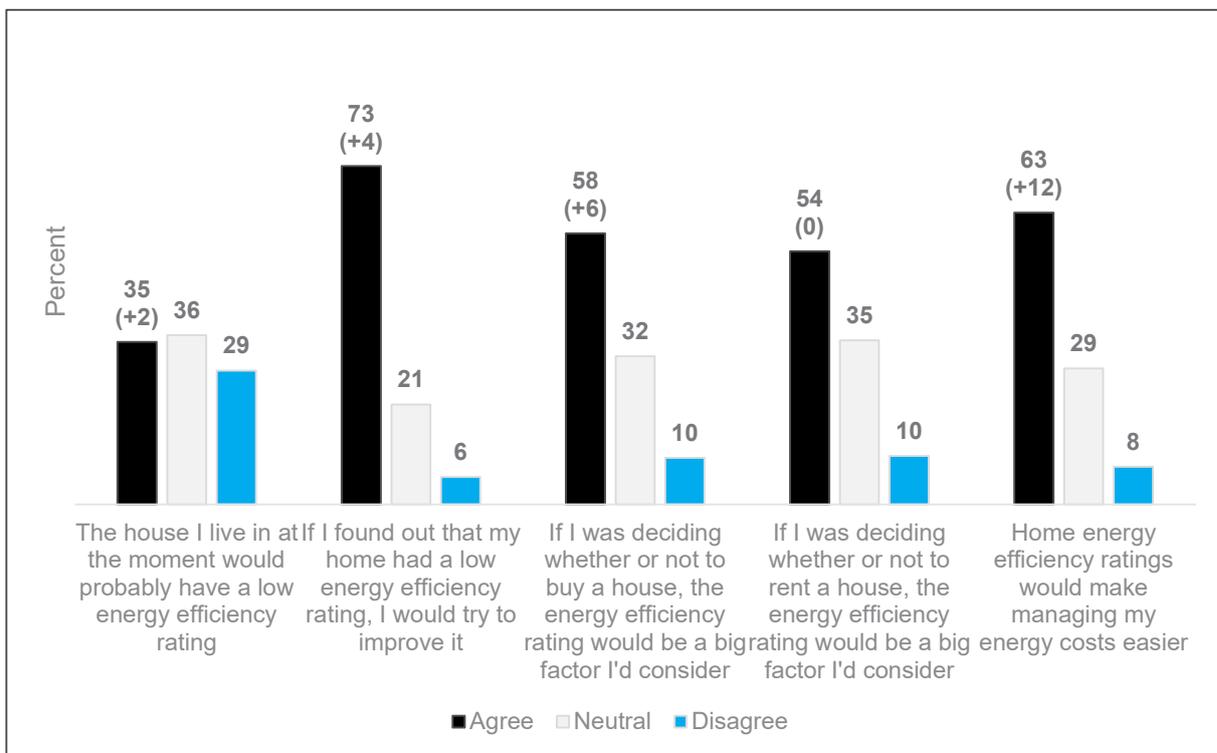


Housing energy efficiency

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 home-owners say they would try to improve their home’s energy rating if they found out it had a low rating.
- 63% say a home energy efficiency rating would make managing their energy costs easier (up 12%).
- 58% say an energy rating would be a big factor they would consider when buying a house (up 6%).
- 54% of renters say an energy rating would be a big factor they would consider when renting a house.
- Only 29% disagree that the house they live in would have a *low* energy efficient 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 NSW (n=421)

Base for 'I would try to improve my home energy efficiency': Home-owners in NSW (n=289)

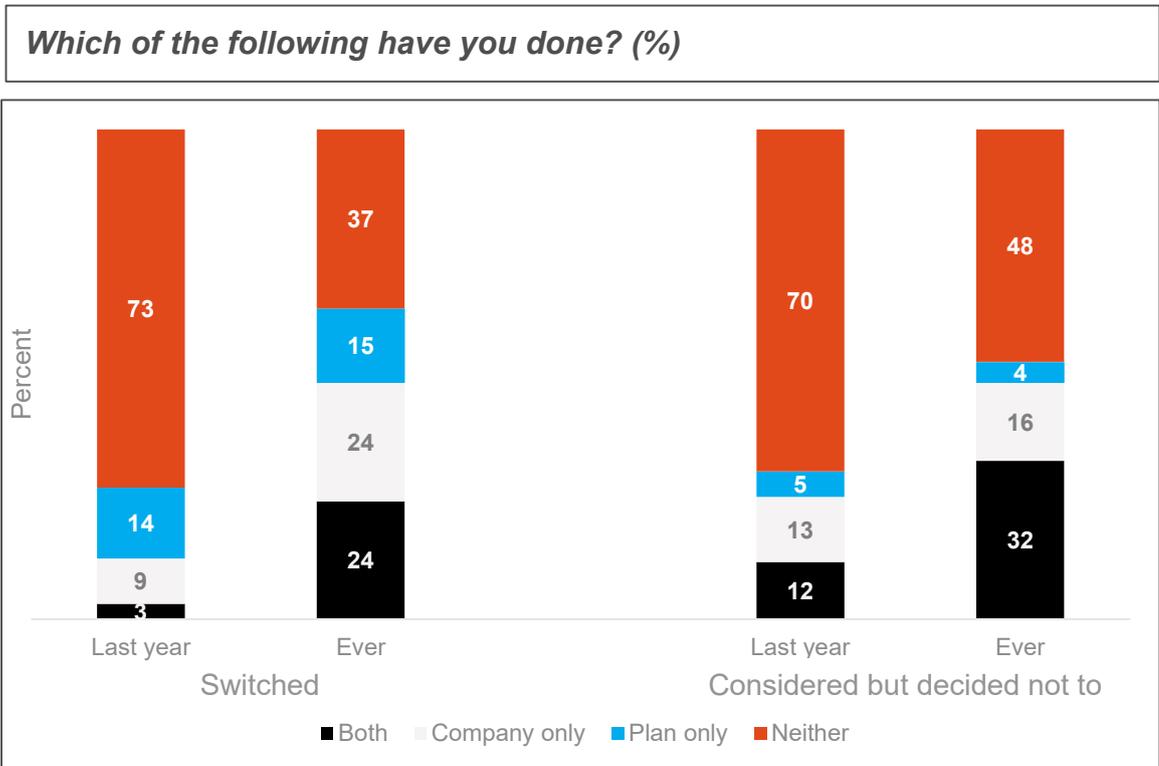
Base for 'consider energy rating when renting': Renters in NSW (n=125)



Switching behaviour

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

- 26% say they have switched companies, plans or both in the past year.
- 37% report that they have never switched companies or plans.
- 30% say they considered switching companies or plans in the past year but did not actually do so at the time.



Base: Consumers in NSW (n=421)



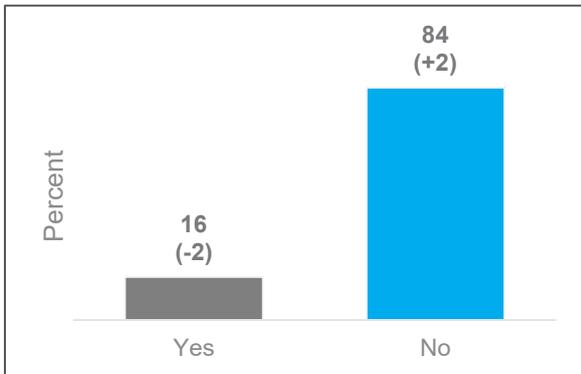
Activity

Reasons for considering switching

Dissatisfaction with the value for money of their electricity service is the main reason for switching activity among NSW consumers.

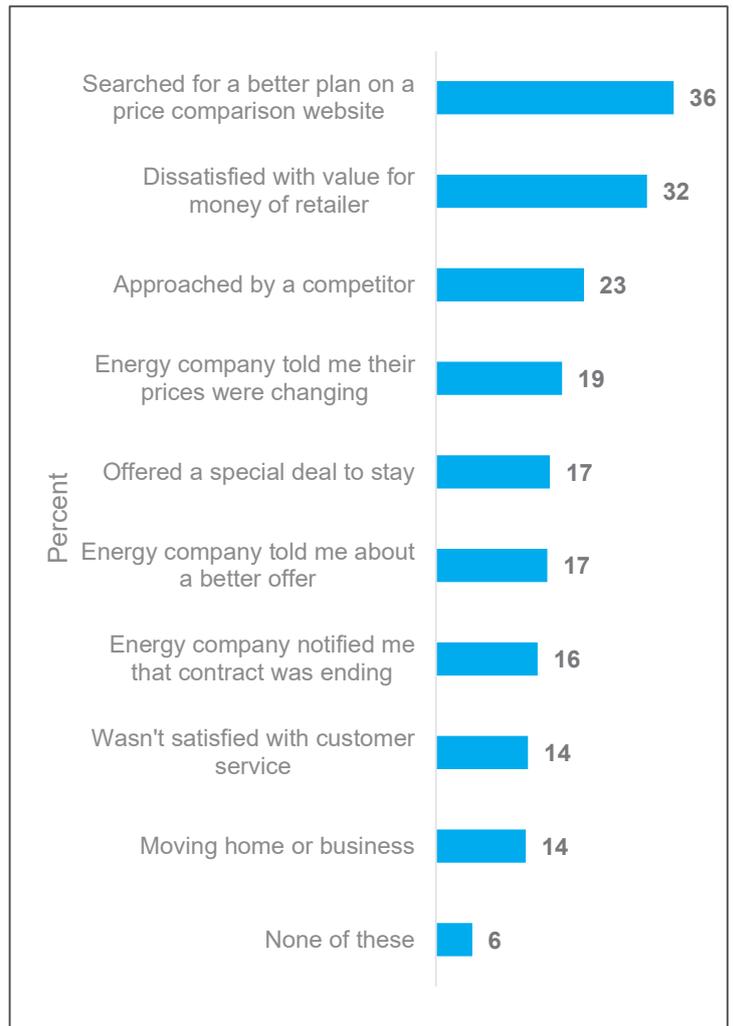
- 36% of those who looked at switching in the past, say they searched for a better plan on a comparison website.
- 16% say they intend to switch plans or retailers in the next year.

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



Base: Consumers in NSW (n=421)

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=270)



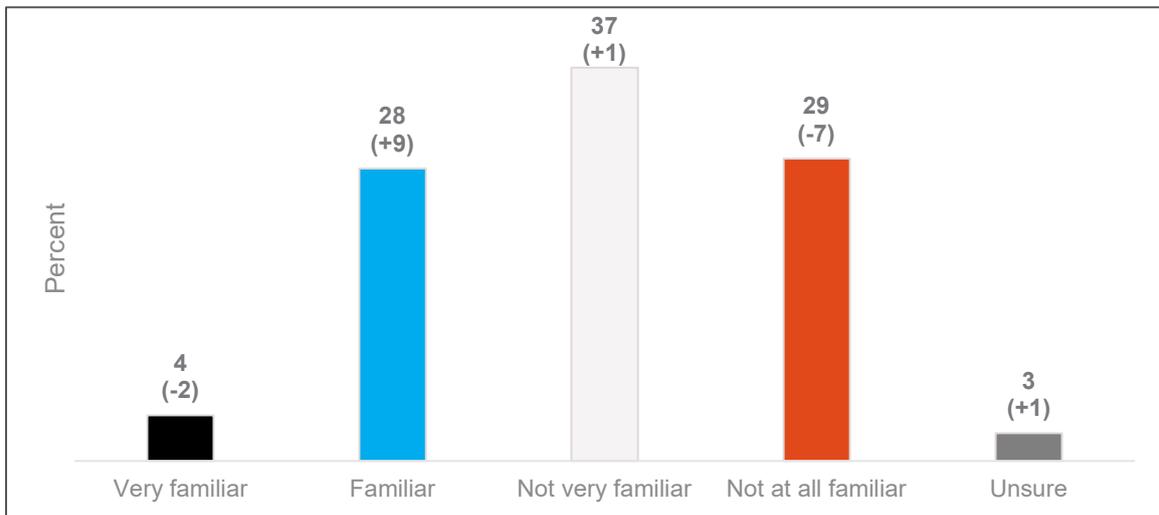
Other

Awareness of the Energy Ombudsman

One third of NSW consumers say they are very familiar or familiar with the Energy Ombudsman.

- Familiarity with the Ombudsman amongst NSW household consumers increased 7%.

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



Base: Consumers in NSW (n=421)



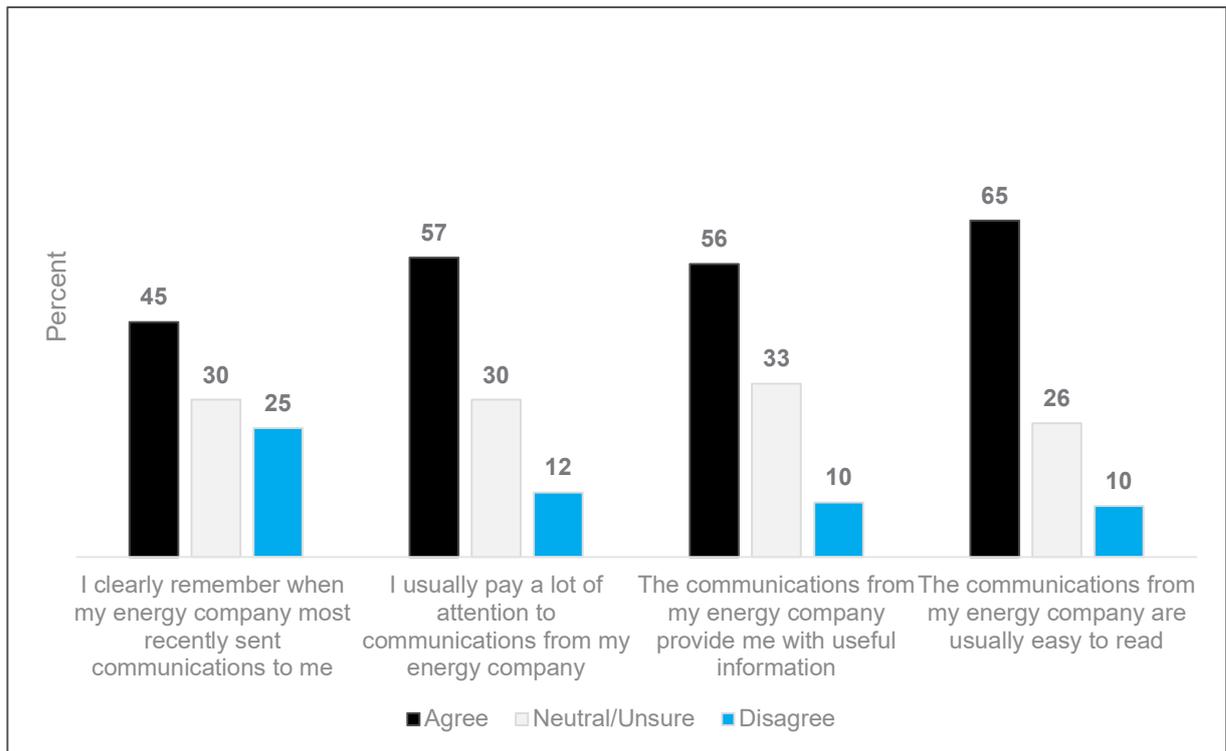
Other

Communications from energy providers

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

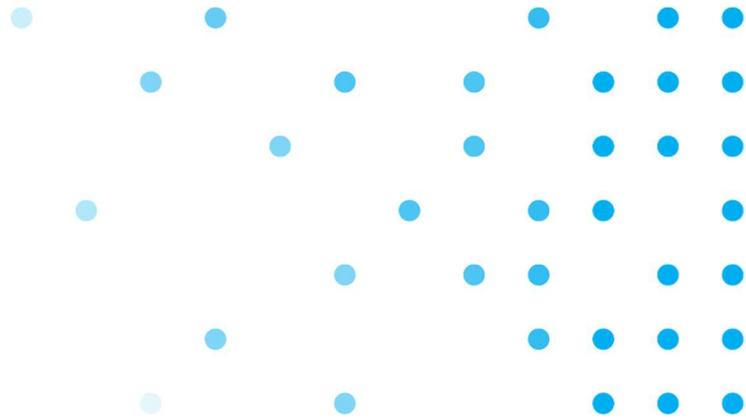
- Only 65% of NSW consumers agree that communications from their energy company are easy to read.
- Only 57% agree they pay a lot of attention to communications from their energy company.
- Only 56% agree that the communications from their energy company provide useful information.
- 45% of NSW household consumers 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 NSW (n=421)

Victoria





Overall satisfaction

Satisfaction with the provision of electricity and gas services overall has increased in Victoria.

- 76% are satisfied with their electricity and gas services (up 7%).

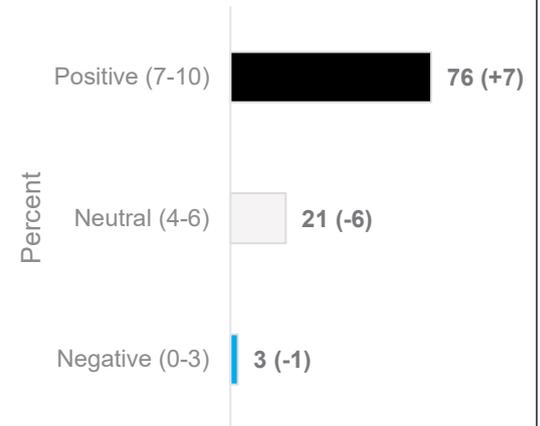
Satisfaction with the level of competition has increased.

- 61% are positive about the level of competition in the energy market in their area (up 9%).

Satisfaction

Overall Satisfaction

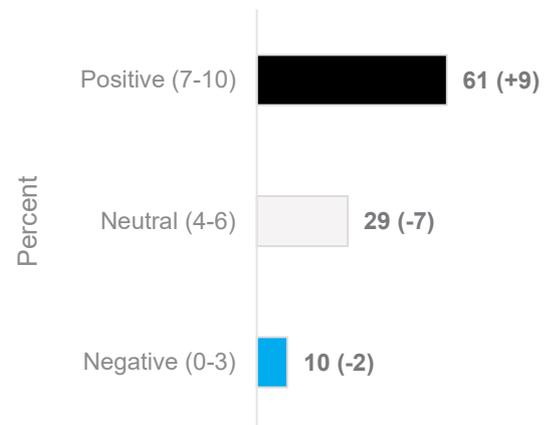
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in VIC (n=428)

Satisfaction with competition

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



Base: Consumers in VIC (n=428)

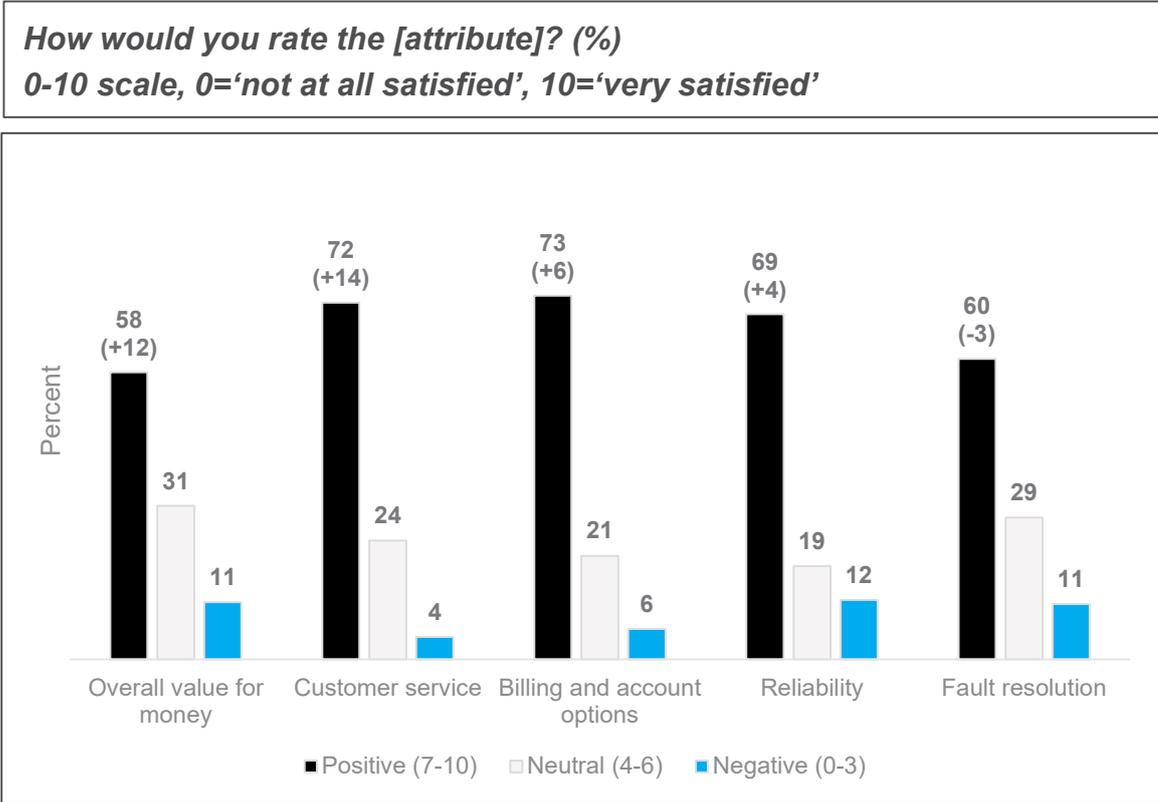


Satisfaction

Satisfaction with electricity

Satisfaction among Victorian household consumers has increased across all measures, except fault resolution.

- 58% are satisfied with the overall value for money of their electricity (up 12%).
- 73% are satisfied with their billing and account options (up 6%).
- 72% are satisfied with their customer service (up 14%).
- 69% are satisfied with the reliability of their electricity supply.
- Among consumers who experienced a power outage, 60% are satisfied with fault resolution.



Base: Consumers in VIC with electricity supply (n=428)

Base for fault resolution: Those in VIC who rated 0 to 9 satisfaction and had a power outage (n=235)

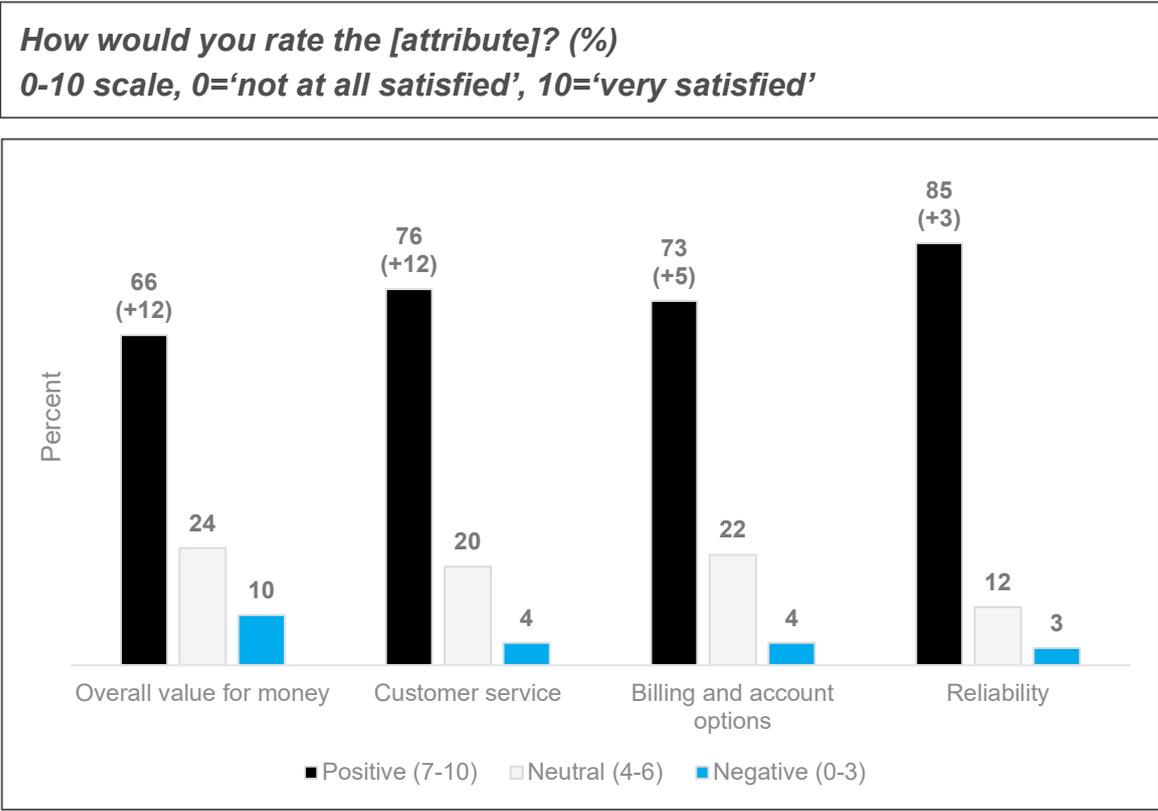


Satisfaction

Satisfaction with gas

Satisfaction with gas services is up across all measures.

- 66% are satisfied with the value for money of their gas service (up 12%).
- 85% are satisfied with the reliability of their gas service, which remains the measure with the highest level of satisfaction.
- 76% are satisfied with their gas provider’s customer service (up 12%).
- 73% of Victorian gas consumers are satisfied with the available billing and account options (up 5%).



Base: Consumers in VIC with gas supply (n=378)



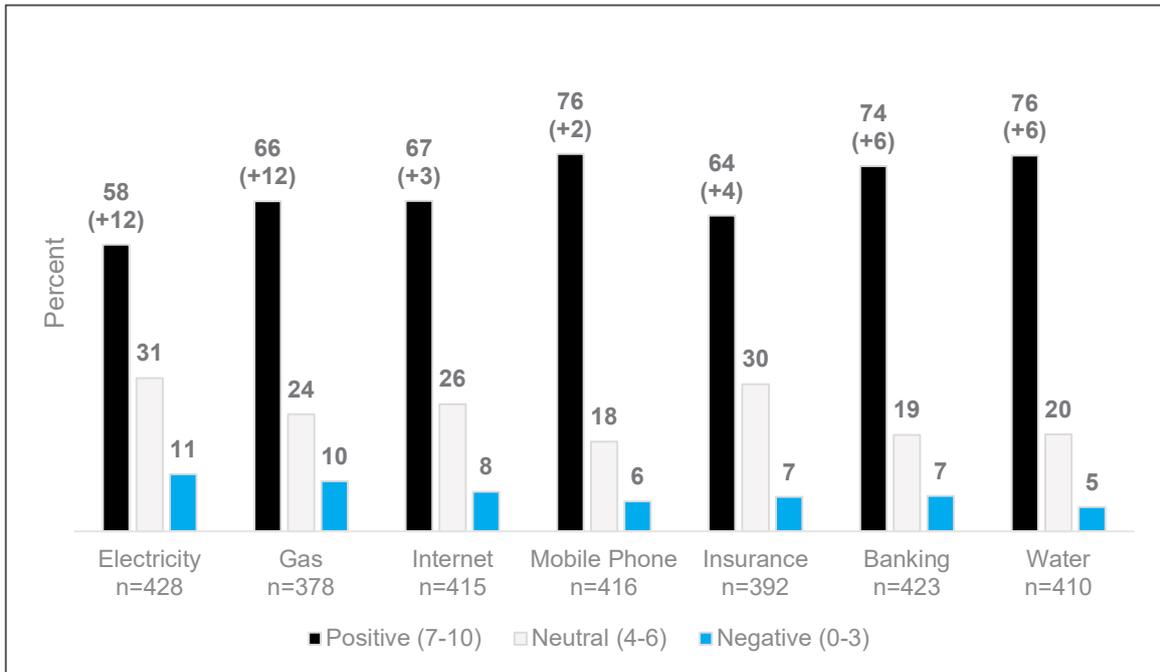
Satisfaction

Satisfaction with utilities and services

Victorian household consumers are more satisfied with the value for money of their electricity services than previously, but still rate it behind all other utilities and services.

- Satisfaction with the value for money of electricity services increased by 12% (to 58%), but still sits behind the next lowest rated utility – insurance (64%).
- Satisfaction with gas services has increased 12% (to 66%).

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



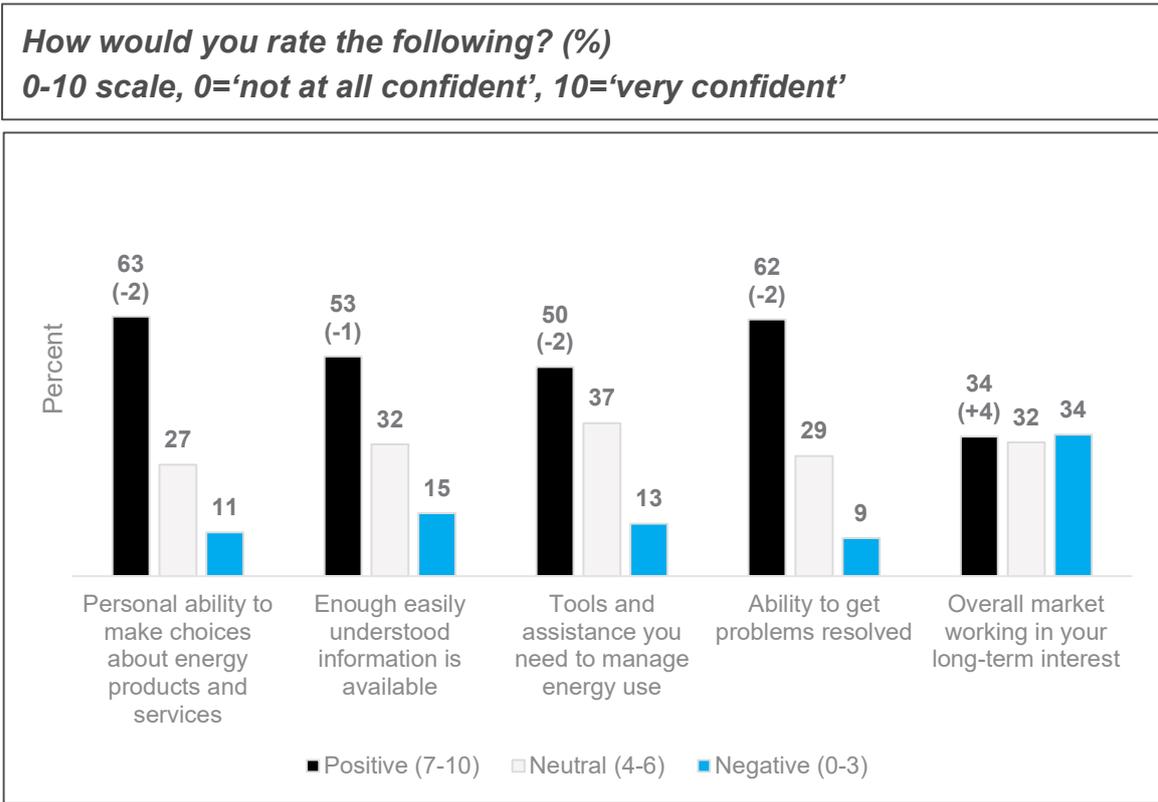
Base: Consumers in VIC with these services



Confidence in information, tools and a working market

Consumer confidence has remained consistent across all measures.

- 63% are confident in their own ability to make choices about energy products and services.
- 62% are confident about their ability to get problems resolved.
- 53% are confident there is enough easily understood information available to support their decision making about energy products and services.
- Half of Victorian households are confident in the tools and assistance they need to manage their energy use.
- Only 34% are confident the overall market is working in their long-term interests.



Base: Consumers in VIC (n=428)

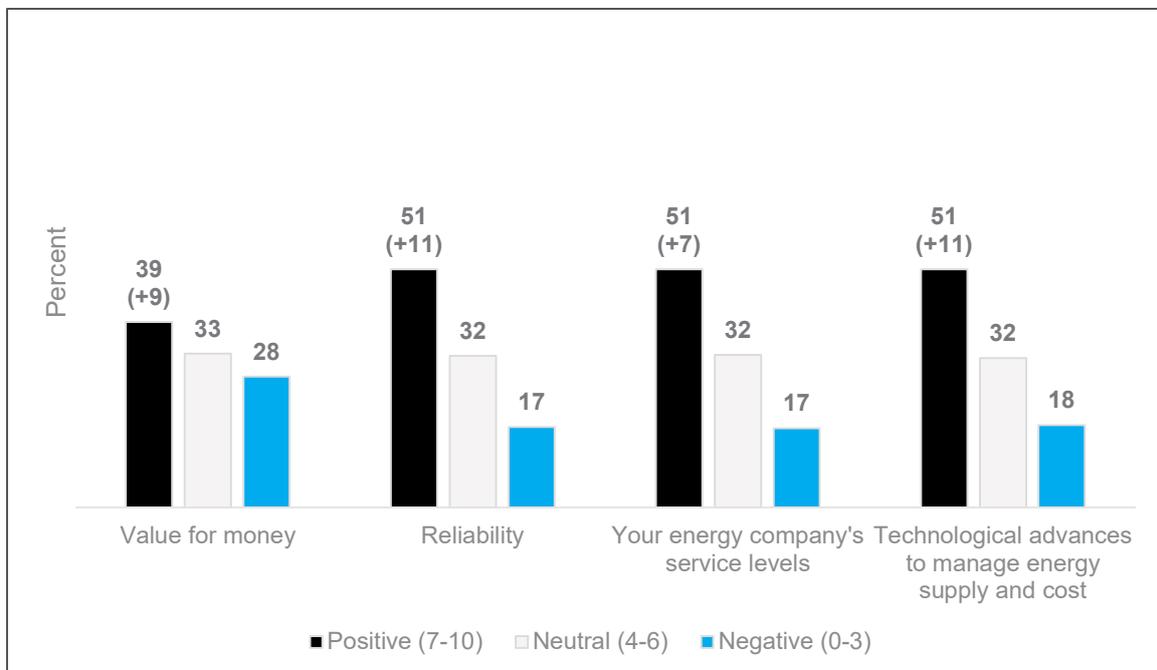


Confidence in long term outcomes

There has been an increase in confidence in future outcomes, but still only 39% are confident the market will deliver better value for money energy services in the future.

- Confidence in improved long-term value for money for energy services has increased by 9% (to 39%).
- Confidence in technological advances to manage energy supply and cost is at 51% (up 11%).
- Confidence that customer service outcomes will improve in the future is at 51% (up 7%).
- Confidence that the reliability of energy supply will improve in the future has increased to 51% (up 11%).

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=428)

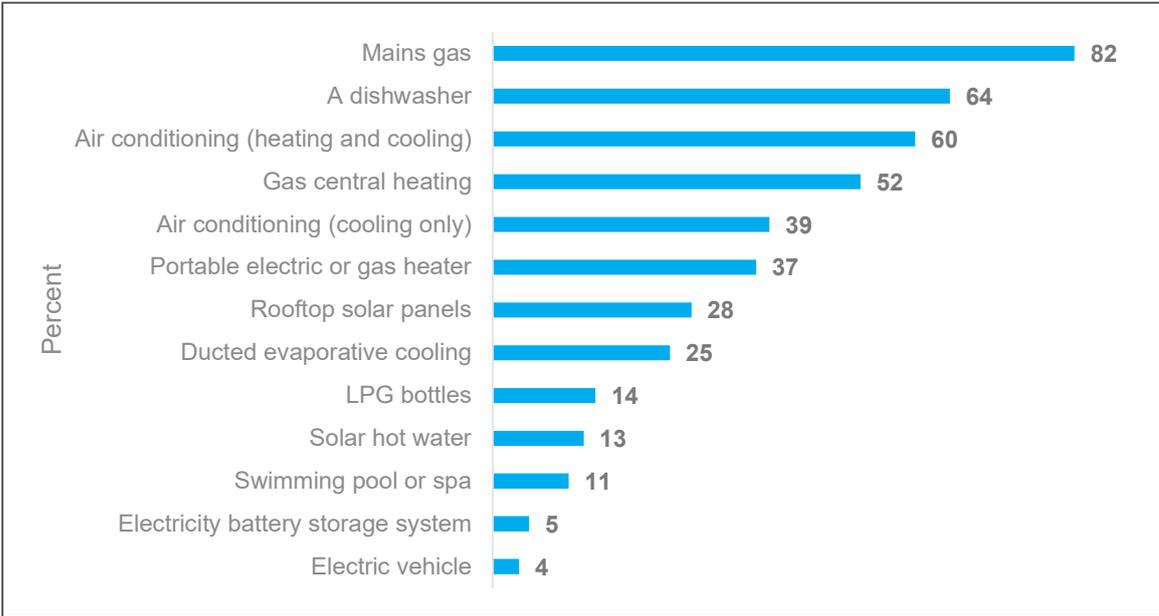


Uptake of technologies

More Victorian households who are claim they have a digital/smart meter say they use it to control their energy costs.

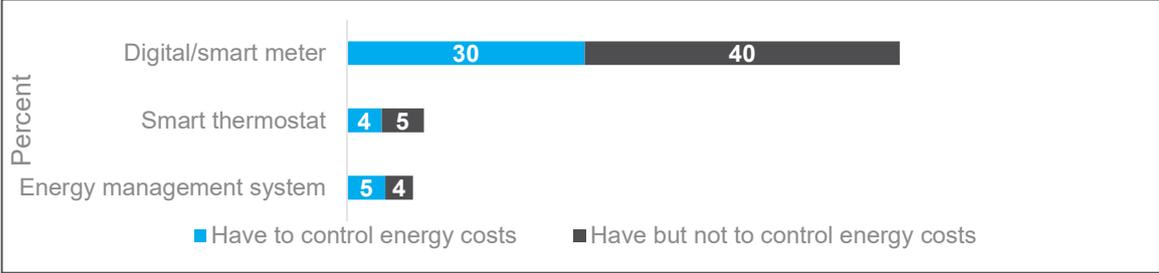
- Only 70% of Victorian respondents say they have a digital/smart meter in their home, but the proportion who said they used it to control their energy costs increased to 30% (up 9%).

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



Base: Consumers in VIC (n=428)

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=428)



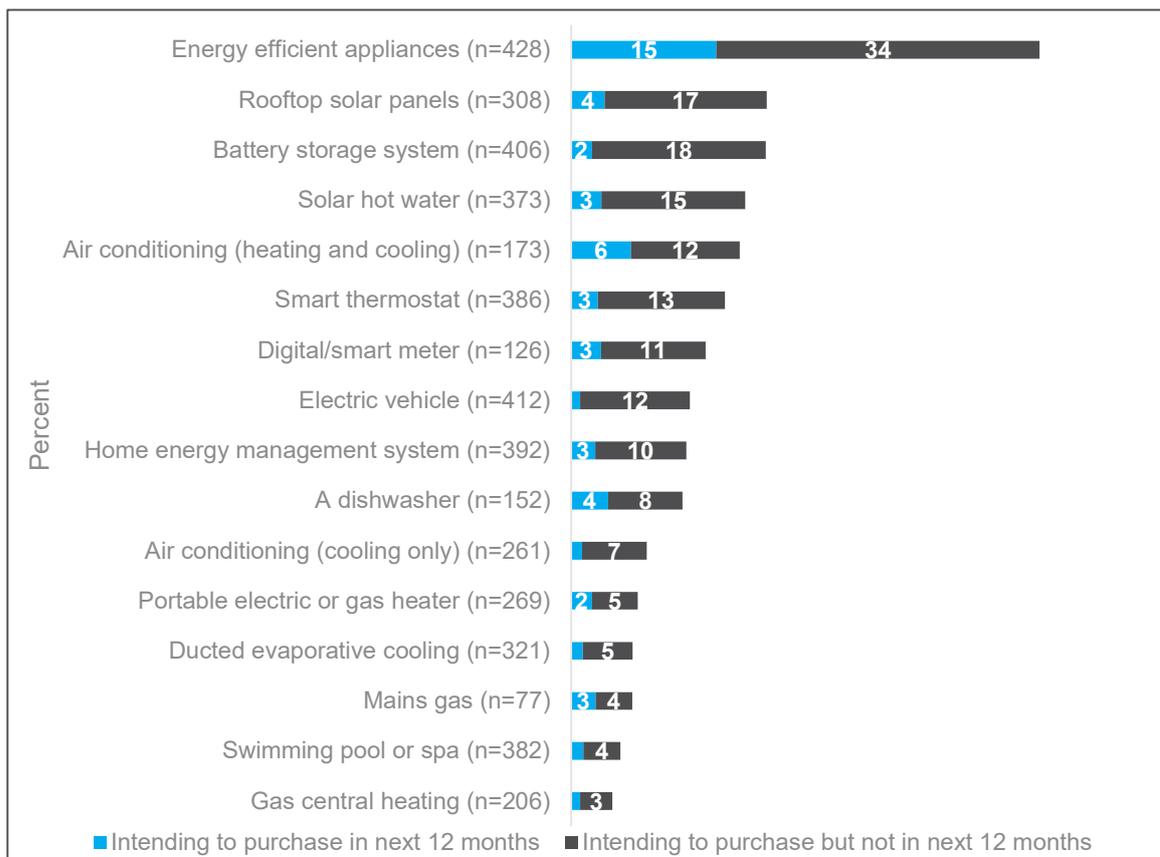
Activity

Future uptake of technologies

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

- Of those households who report having solar panels, 43% expressed interest in adding battery storage systems.
- Of those who do not currently have solar panels, 21% say they are considering installing them, including 4% who say they intend to do so in the next 12 months.
- 20% are considering a battery storage system, including 2% who say they intend to purchase a system in the next 12 months.

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



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

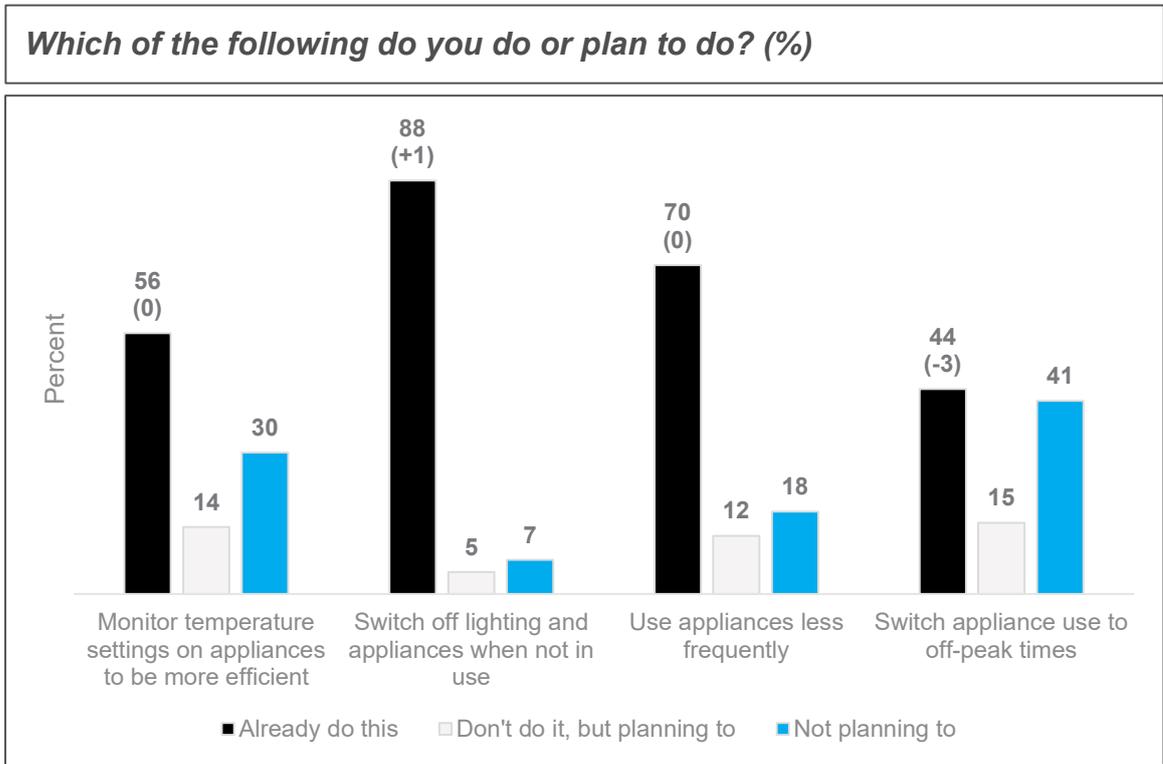
Note: For readability, percentages have been omitted where they are less than 2%



Energy saving practices

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

- 88% say they switch off lighting and appliances when not in use.
- 70% say they are using appliances less frequently.
- 56% say they are monitoring temperature settings on appliances to be more efficient.
- 44% say they are already switching appliance use to off-peak times.



Base: Consumers in VIC (n=428)

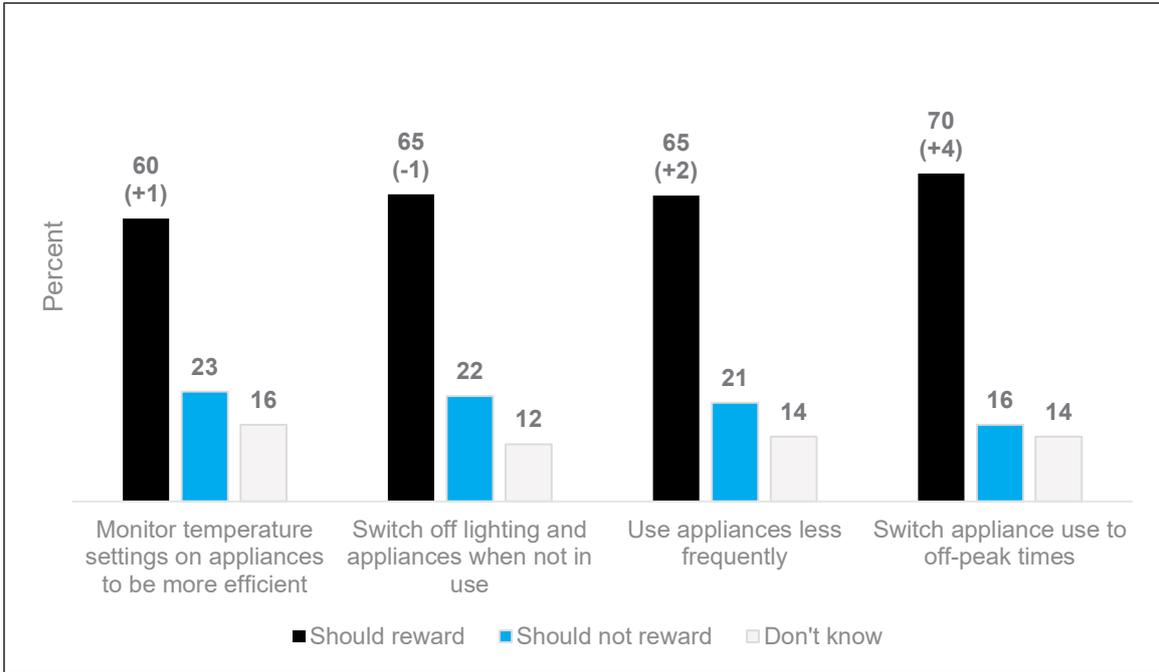


Reward for reducing energy use

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.

- 69% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 65% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use.
- 65% think electricity companies should do more to financially reward customers who use appliances less frequently.
- 60% 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 VIC (n=428)

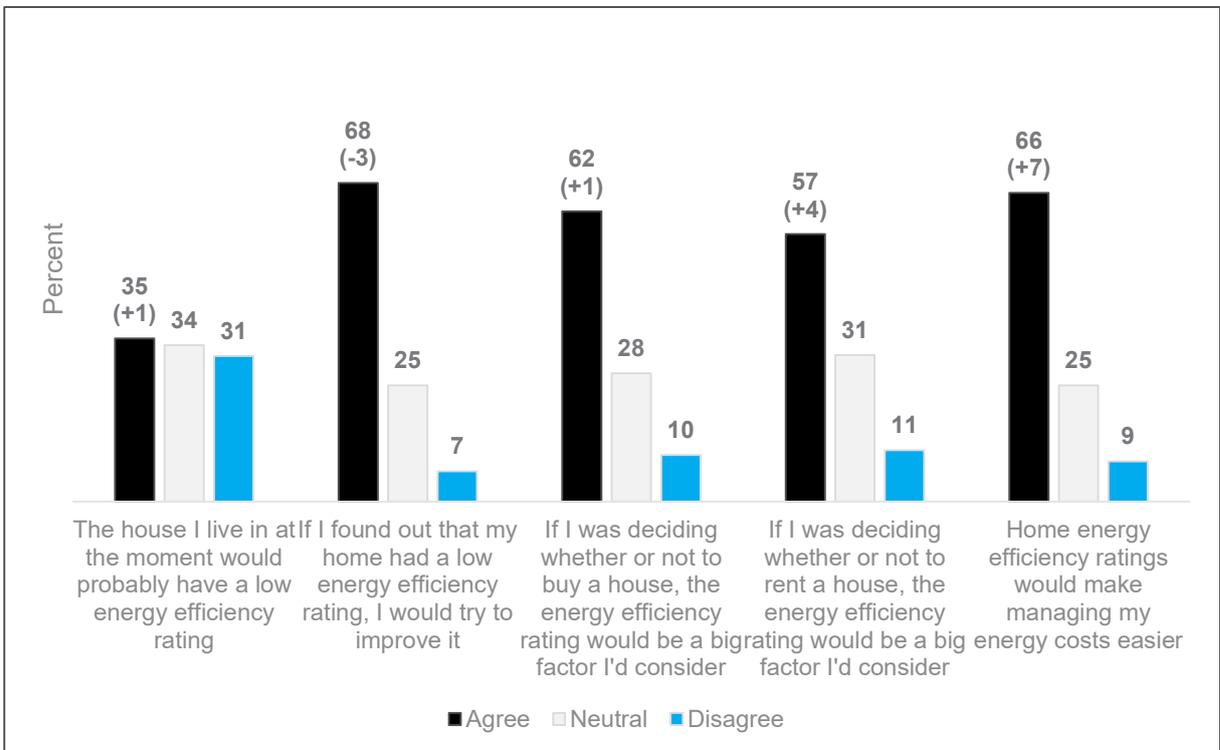


Housing energy efficiency

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

- 68% of home-owners say they would try to improve their home’s energy rating if they found out it had a low rating.
- 66% say that a home energy efficiency rating would make managing their energy costs easier (up 7%).
- 62% say that an energy efficiency rating would be a big factor they would consider when buying a house.
- 57% of renters say that an energy rating would be a big factor they would consider when renting a house.
- Only 31% disagree with the statement that the house they live in at the moment would probably have a *low* energy efficiency rating.

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



Base for '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=428)

Base for 'I would try to improve my home energy efficiency': Home-owners in VIC (n=292)

Base for 'consider energy rating when renting': Renters in VIC (n=127)

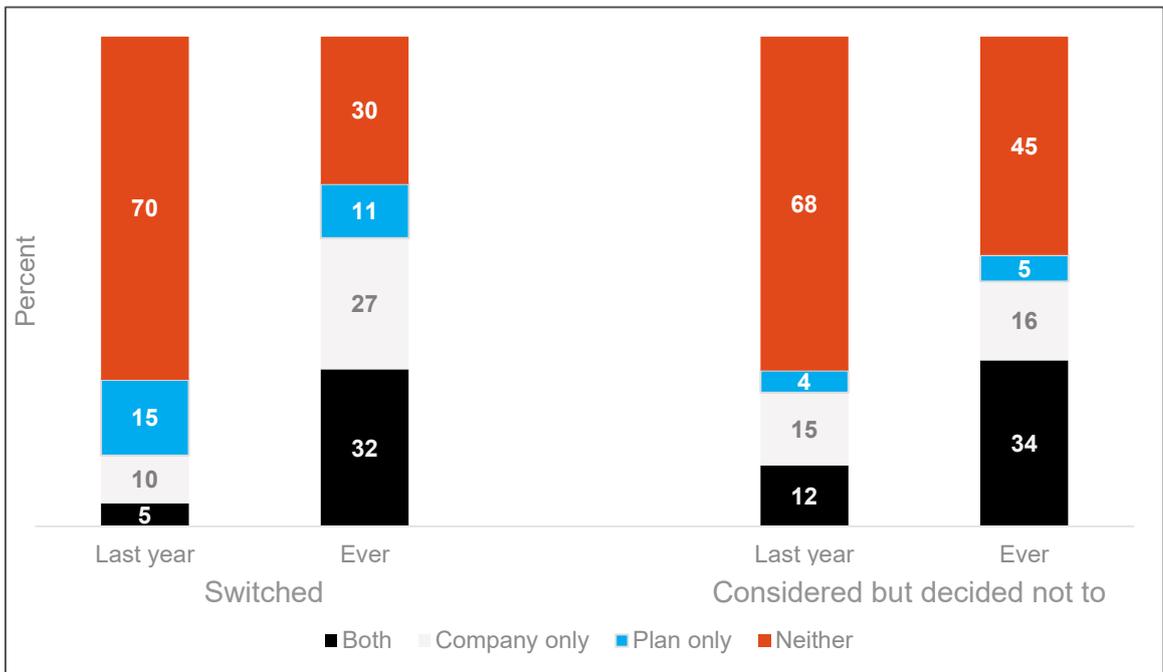


Switching behaviour

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

- A further 31% of Victorian household consumers considered switching in the past year but did not do so.
- 30% say they have never switched companies or plans.

Which of the following have you done? (%)



Base: Consumers in VIC (n=428)



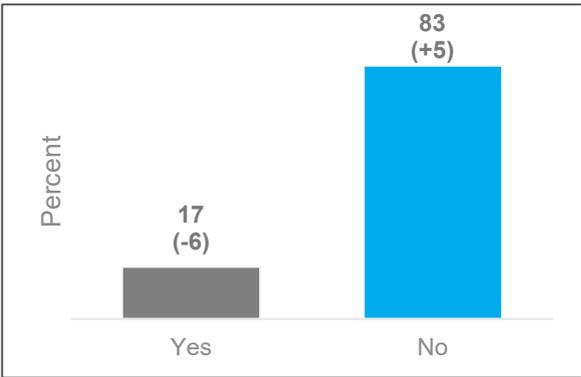
Activity

Reasons for considering switching

Dissatisfaction with their retailer’s value for money is the most common reason for considering switching.

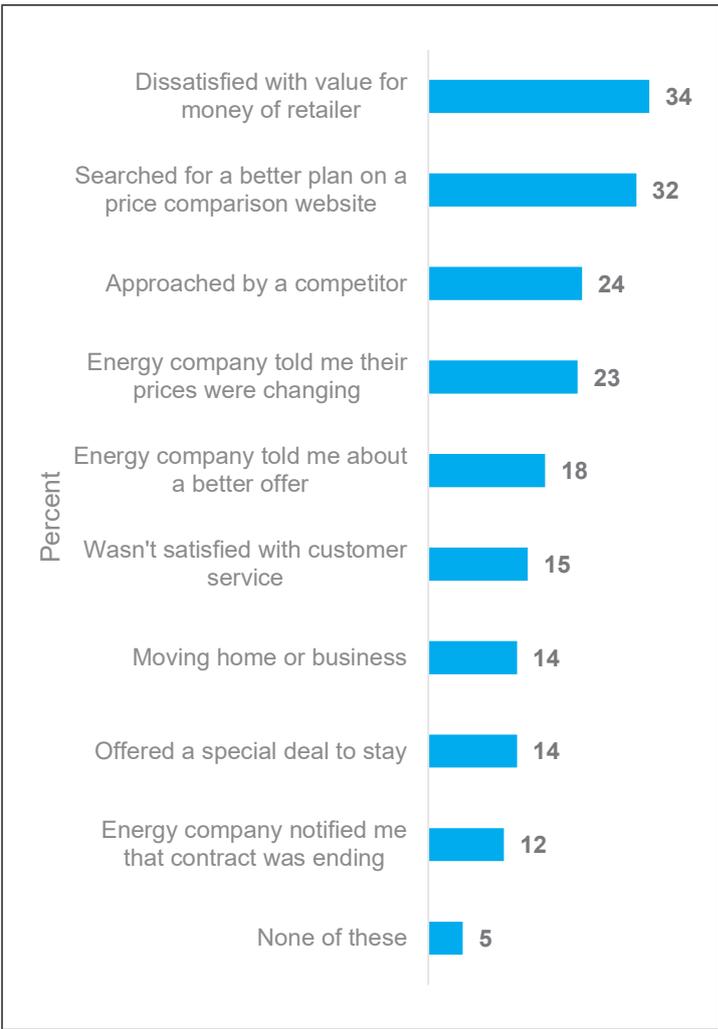
- 34% of those who have looked at switching energy companies or plans say they were dissatisfied with value for money of their retailer.
- Another 32% searched for a better plan on a comparison website.
- 17% of all Victorian household consumers say they intend to switch in the next year (down 6%).

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



Base: Consumers in VIC (n=428)

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=302)



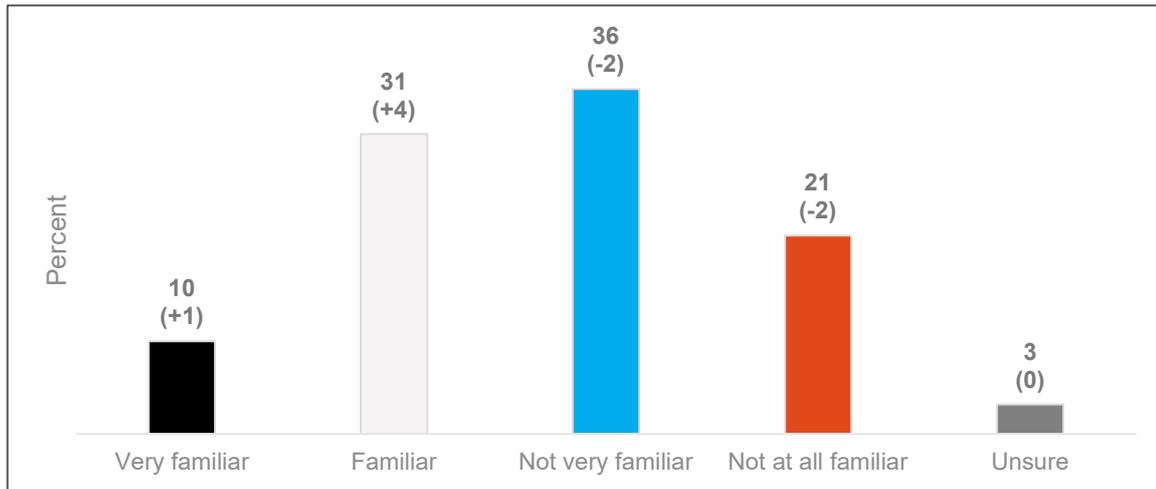
Other

Awareness of the Energy Ombudsman

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

- Familiarity with the Ombudsman amongst Victorian household consumers increased 5%.

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



Base: Consumers in VIC (n=428)



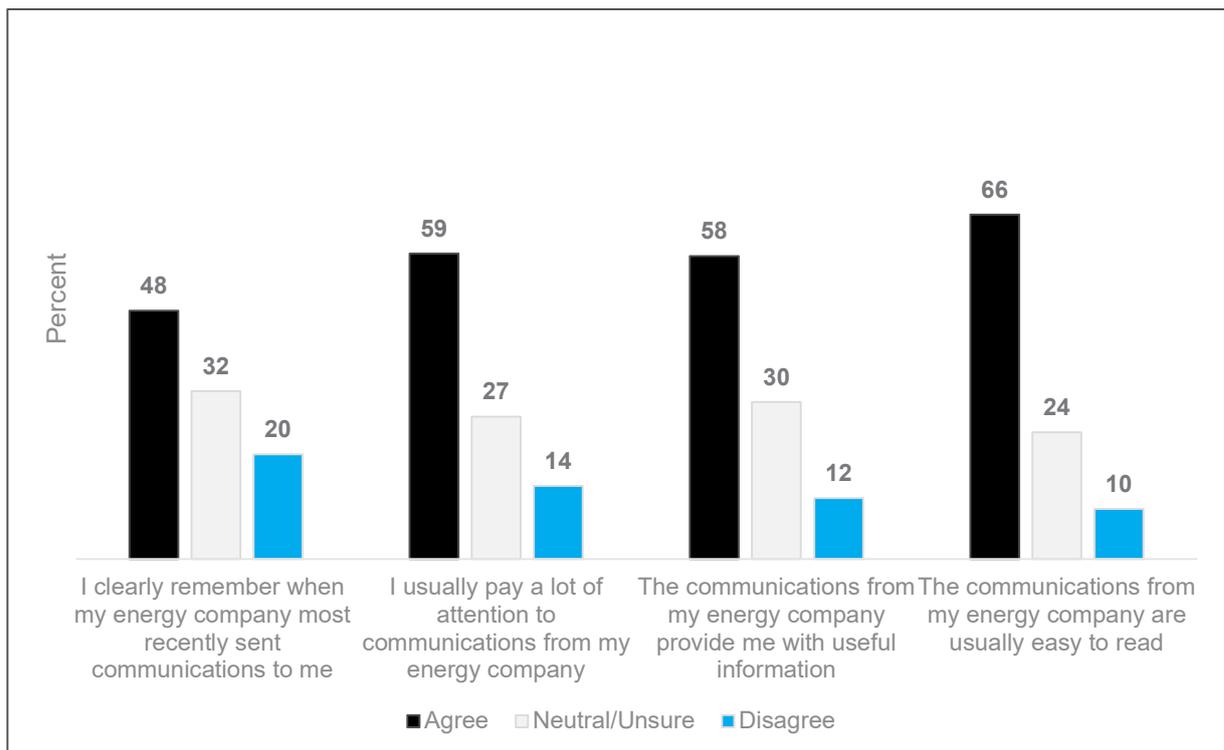
Other

Communications from energy providers

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

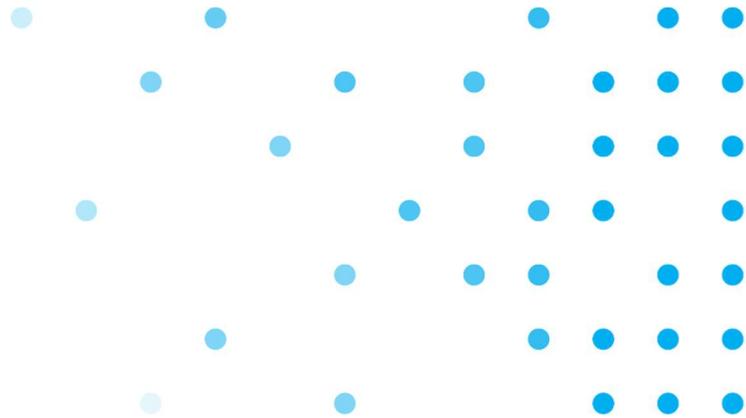
- 66% of Victorian consumers agree that communications from their energy company are easy to read.
- 59% agree they pay a lot of attention to communications from their energy company.
- Only 58% agree that the communications from their energy company provide useful information.
- 48% of Victorian household consumers can 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 VIC (n=428)

Queensland





Satisfaction

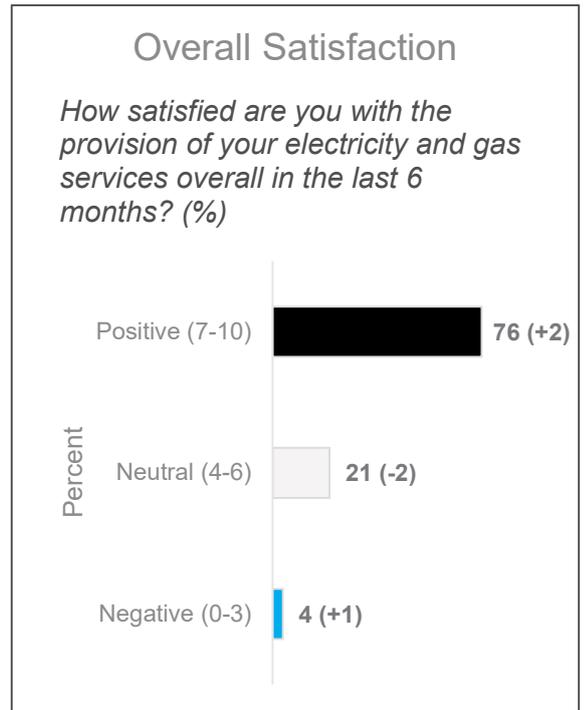
Overall satisfaction

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

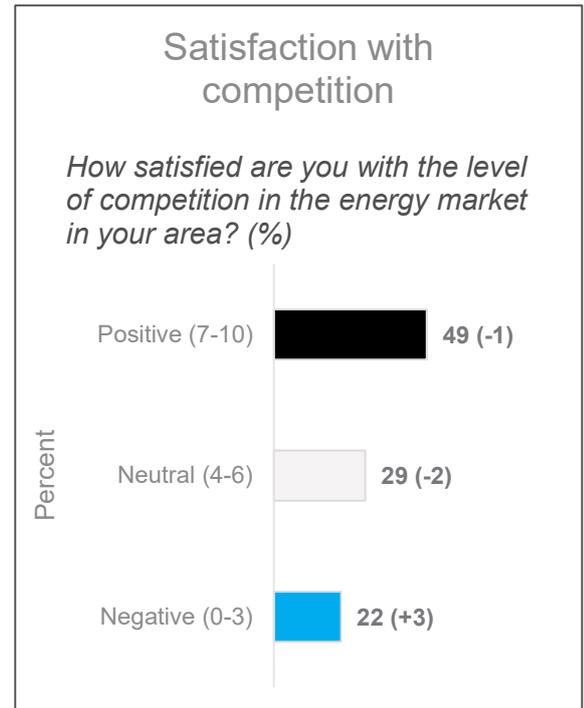
- 76% are satisfied, similar to last year's survey.

Satisfaction with levels of competition has decreased.

- 49% say they are satisfied with the level of competition in their area with no significant change from last year.



Base: Consumers in QLD (n=320)



Base: Consumers in QLD (n=320)



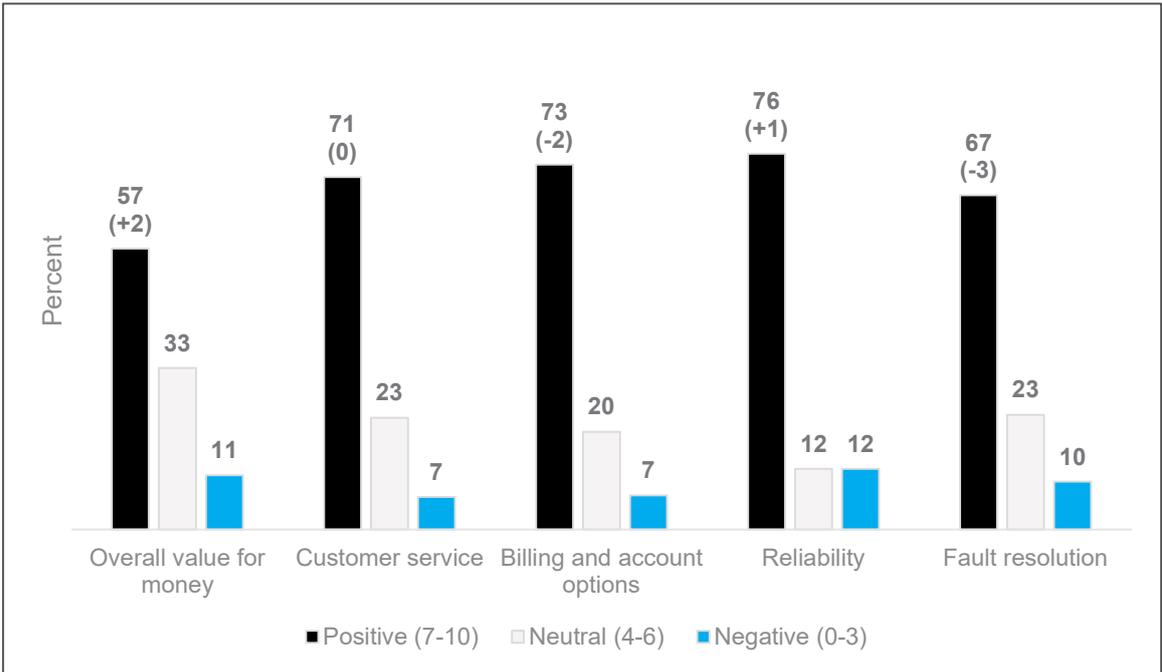
Satisfaction

Satisfaction with electricity

After increasing significantly in the June 2019 survey, satisfaction with electricity services among Queensland household consumers is mostly stable.

- 57% are satisfied with the overall value for money of their electricity service.
- 76% are satisfied with reliability.
- 73% are satisfied with their billing and account options.
- 71% are satisfied with their energy company’s customer service.
- 67% of those who experienced a power outage 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 QLD with electricity supply (n=320)
Base for fault resolution: Those in QLD who rated 0 to 9 satisfaction and had a power outage (n=156)



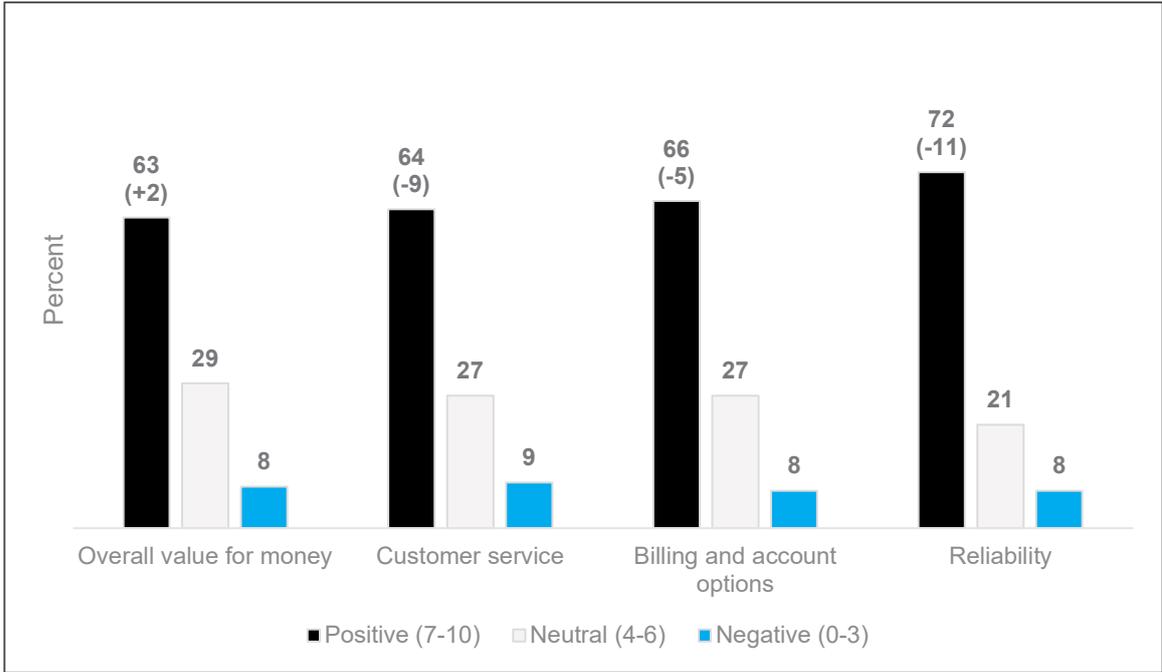
Satisfaction

Satisfaction with gas

Queensland household consumers' satisfaction with gas services has decreased across all measures except for overall value for money.

- 63% say they are satisfied with the overall value for money of their gas service.
- 72% say they are satisfied with the reliability of their gas service (down 11%).
- 66% now say they are satisfied with their billing and account options (down 5%).
- 64% say they are satisfied with the customer service provided by their gas supplier (down 9%).

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=120)

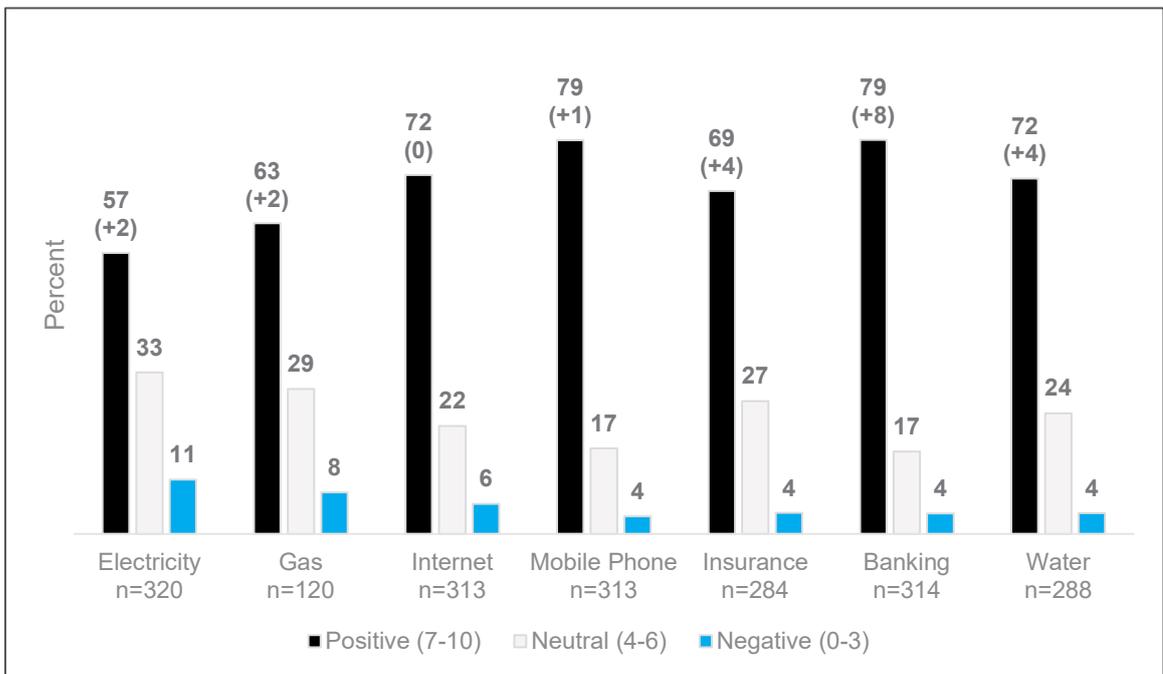


Satisfaction with utilities and services

Satisfaction with the value for money of electricity and gas services remain lower than other utilities and services.

- Satisfaction with the value for money of electricity services is at 57%, 12% below the lowest rated non-energy service (insurance).
- Satisfaction with value for money of gas services stands at 63%

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



Base: Consumers in QLD with these services

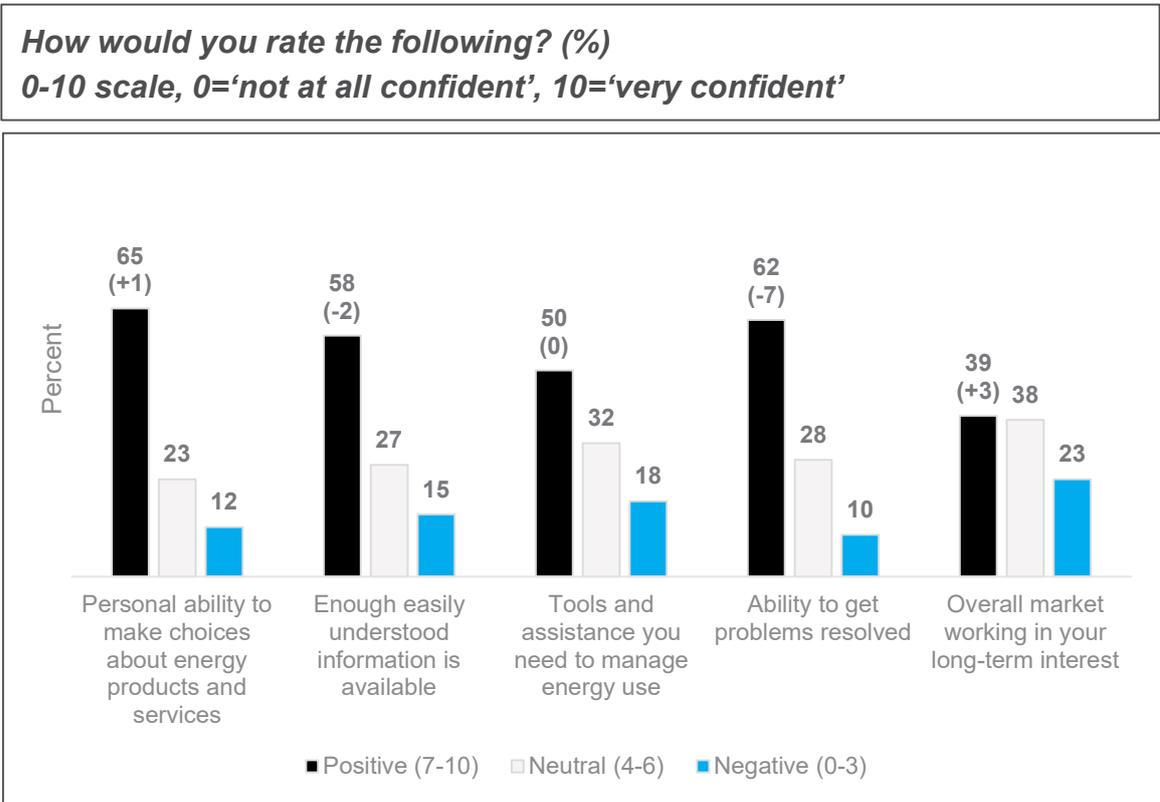


Confidence

Confidence in information, tools and a working market

Queensland household consumers' confidence in their ability to get problems resolved is down but otherwise their confidence is stable

- Consumer confidence in their ability to get problems resolved decreased by 7% (to 62%).
- Consumers' confidence that the overall market is working in their long-term interests is at 39%.
- Respondents' confidence in their personal ability to make choices (65%) did not change significantly from last year.



Base: Consumers in QLD (n=320)



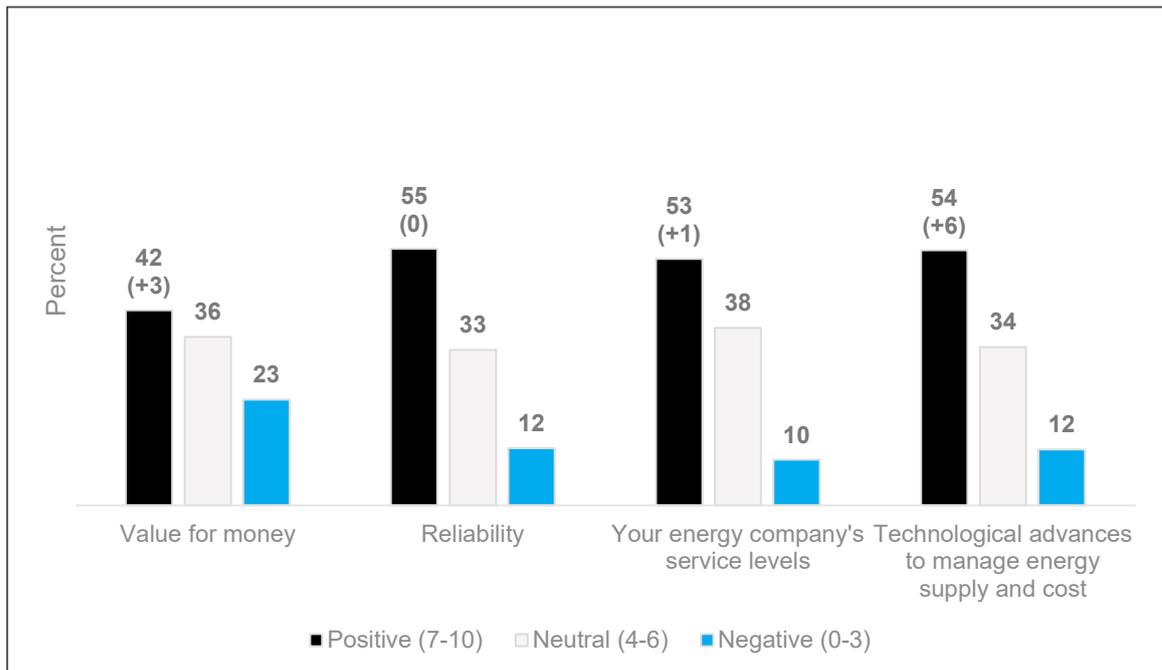
Confidence in long term outcomes

Only two-fifths of Queensland household consumers are confident the market will provide better value for money outcomes in the future.

- The proportion confident of better value for money outcomes in the future is at 42%.
- The proportion confident that future technological advances will improve their ability to manage their energy use and costs is up 6% (to 54%).
- The proportion of Queensland household consumers saying they are confident that there will be more reliable energy services in the future is unchanged at 55%.

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=320)

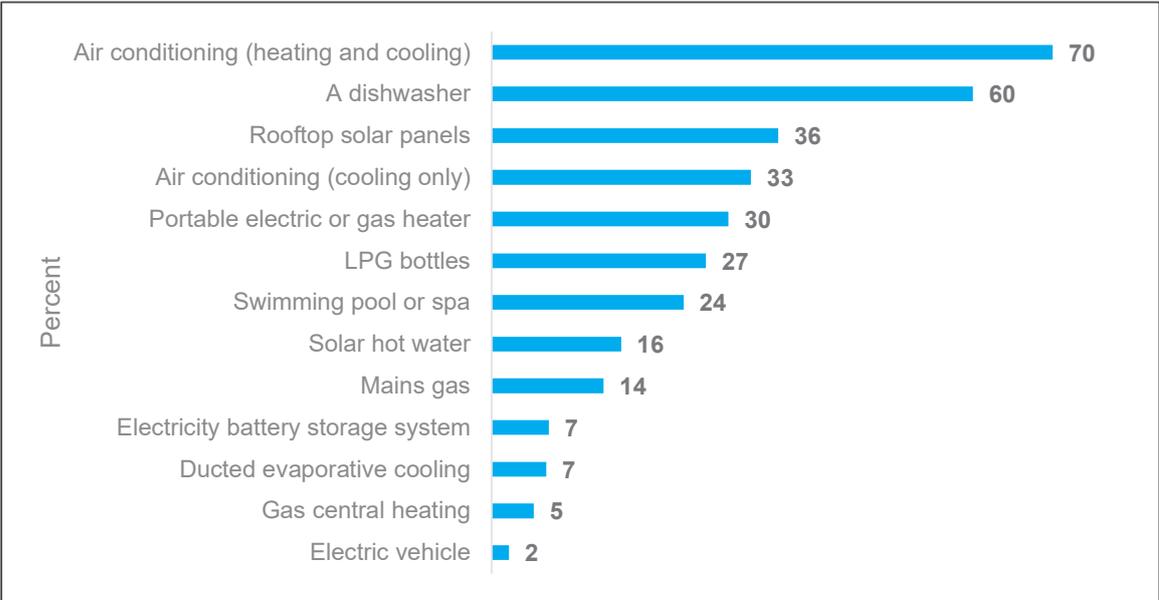


Uptake of technologies

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

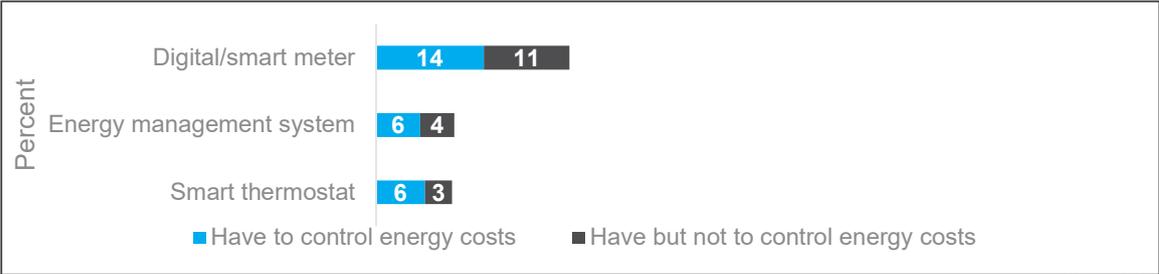
- 25% say they have a smart/digital meter (up 7%) and more than half of those (14%) say they use it to manage their energy use and costs.
- One in ten Queensland households now say they have an energy management system (10%) and/or smart thermostat (9%).
- Only South Australia (45%) and Western Australia (37%) have a higher proportion of households with rooftop solar than Queensland (36%).

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



Base: Consumers in QLD (n=320)

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=320)

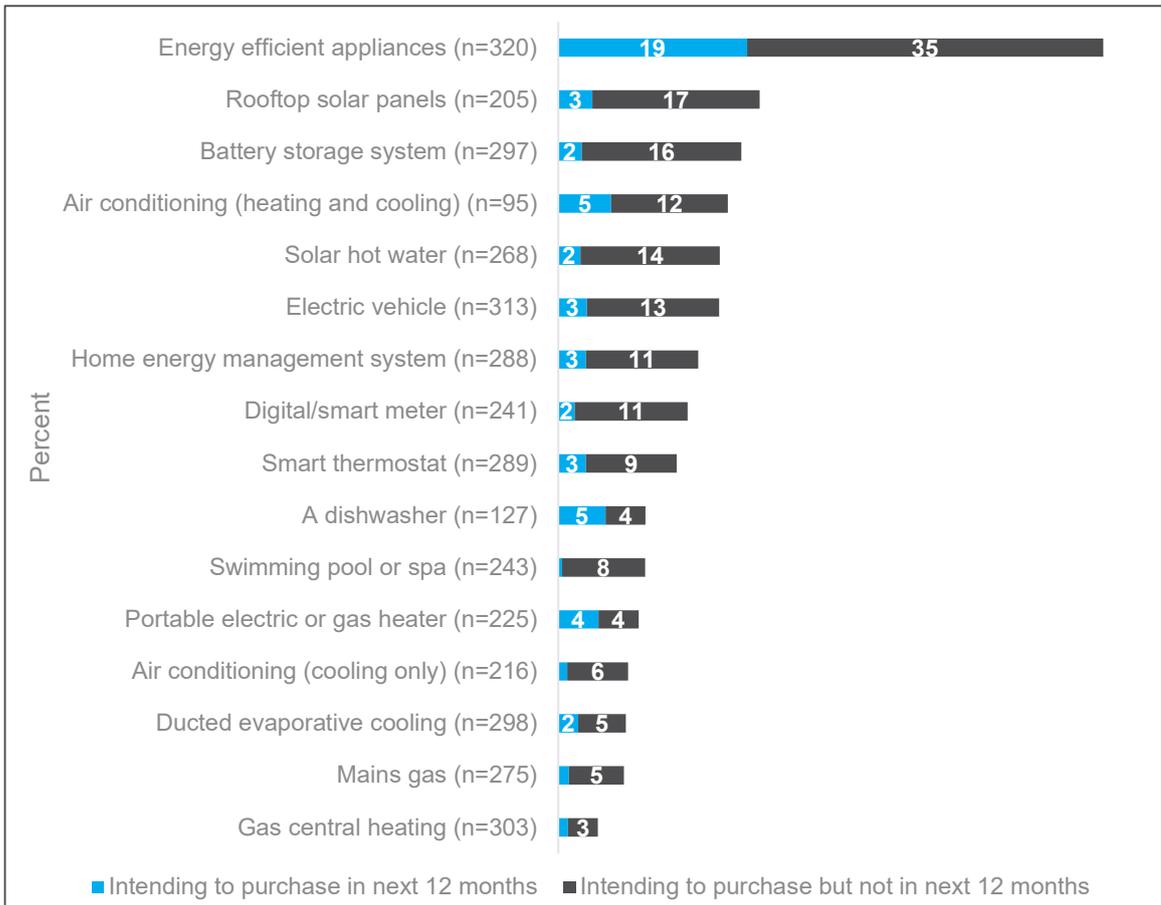


Future uptake of technologies

There is some interest among Queensland consumers in purchasing technology to manage their energy use.

- 54% say they are considering purchasing energy efficient appliances, and 19% plan to do so in the next 12 months.
- 33% of Queenslanders with rooftop solar panels expressed an intention to purchase a battery storage system.

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



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

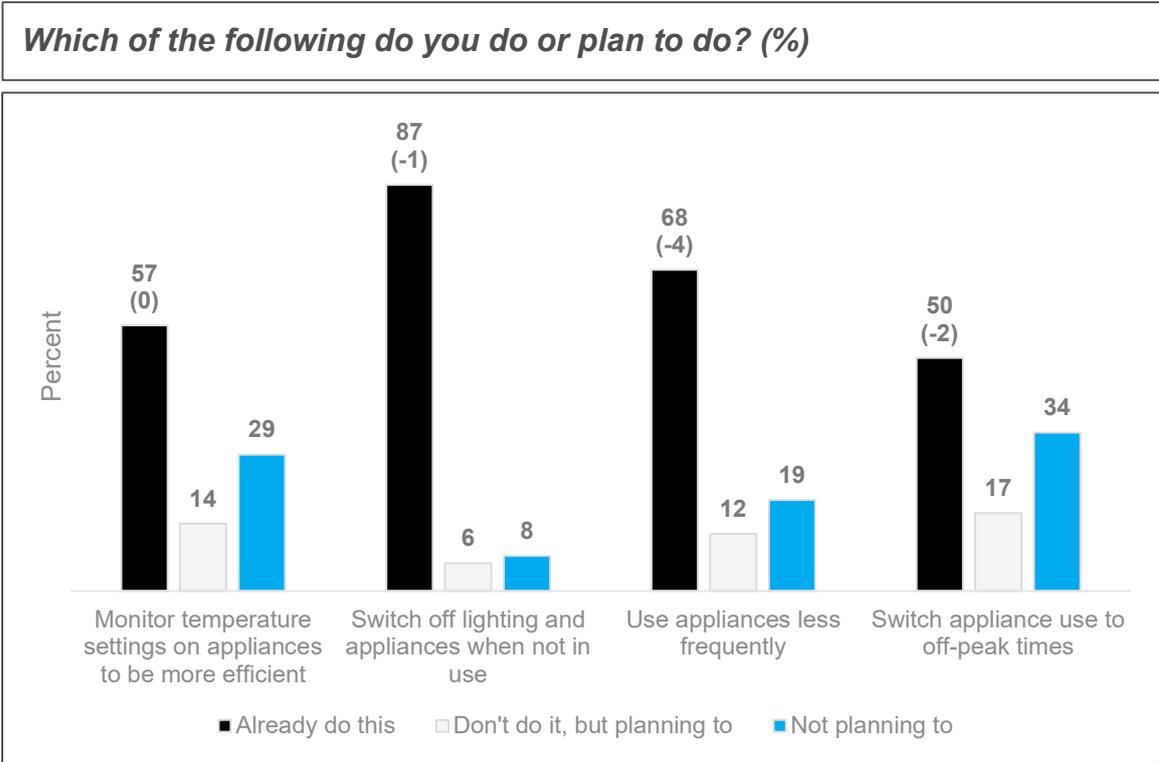
Note: For readability, percentages have been omitted where they are less than 2%



Energy saving practices

Queensland are already 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 (87%) and using appliances less frequently (68%).
- Half of all consumers say they already switch their appliance use to off-peak times (50%).



Base: Consumers in QLD (n=320)

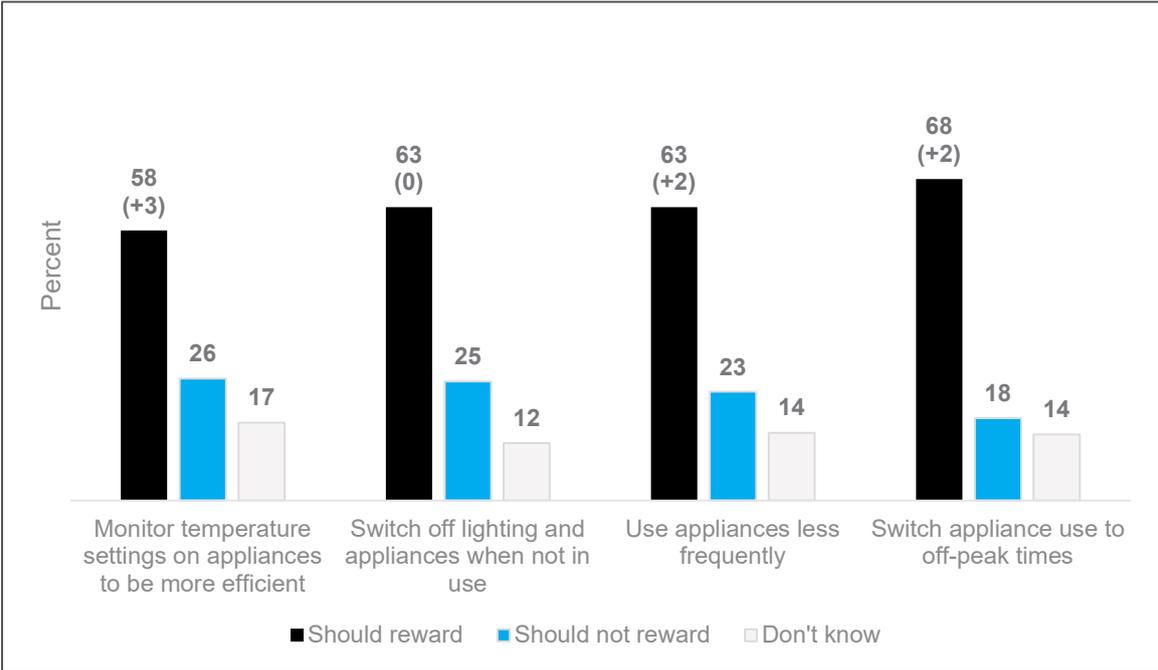


Reward for reducing energy use

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

- 68% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 63% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use.
- 63% think electricity companies should do more to financially reward customers who use appliances less frequently.
- 58% 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: (%)



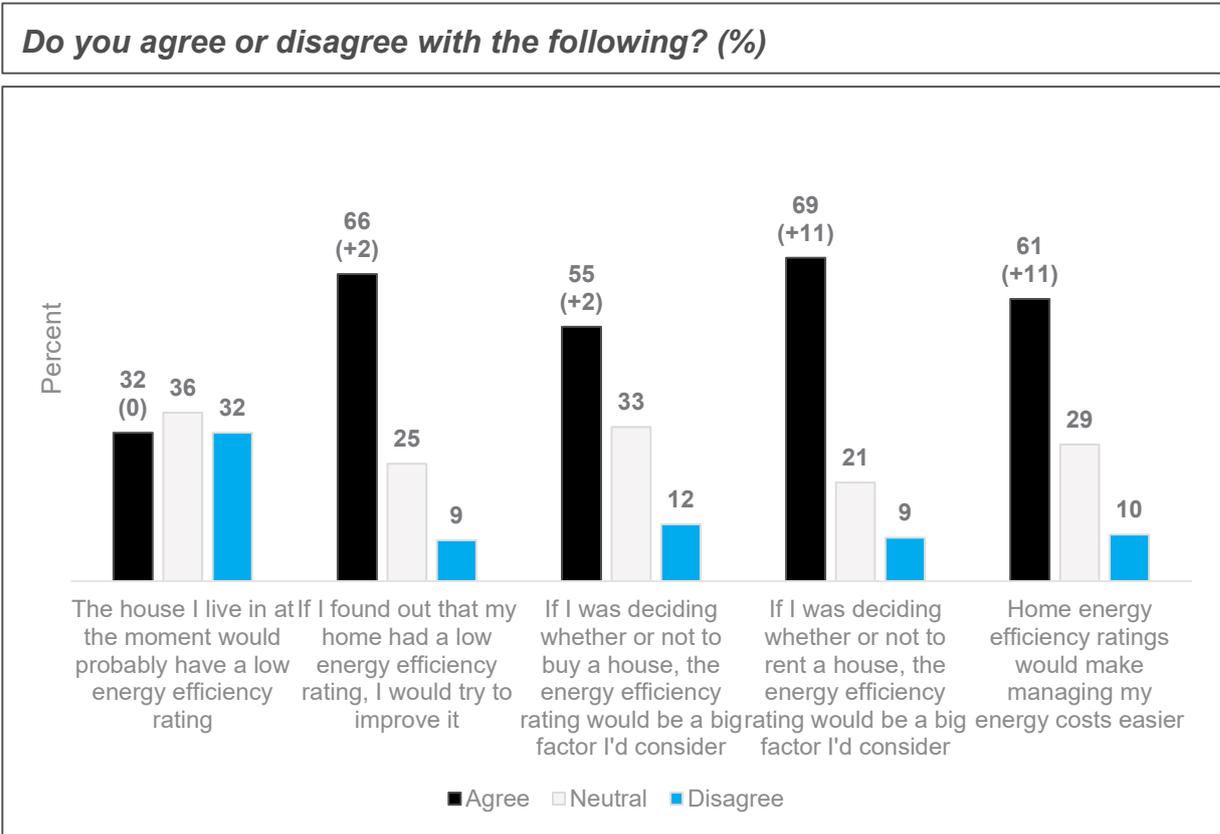
Base: Consumers in QLD (n=320)



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.

- 66% of home-owners say they would try to improve their home’s energy rating if they found out it had a low rating but only 32% disagree with the statement that their home would probably have a *low* energy efficiency rating.
- 69% of renters say that an energy efficiency rating would be a big factor they would consider when renting a house (up 11%).
- 61% say that a home energy efficiency rating would make managing their energy costs easier (up 11%).



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=320)

Base for 'I would try to improve my home energy efficiency': Home-owners in QLD (n=194)

Base for 'consider energy rating when renting': Renters in QLD (n=118)

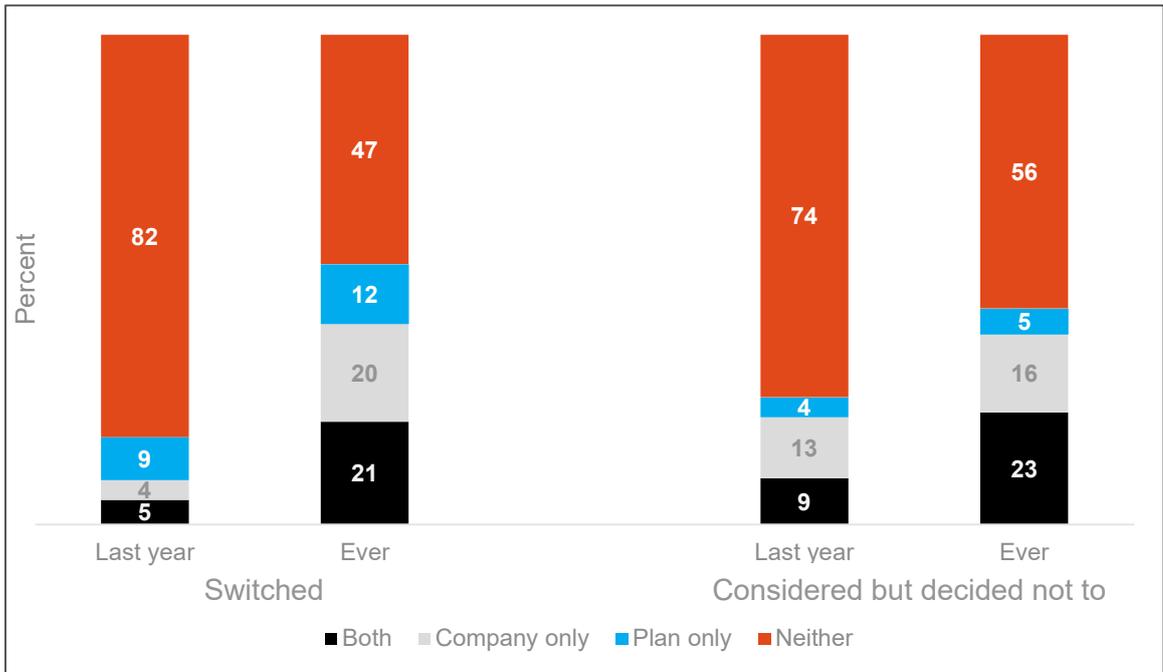


Switching behaviour

Although switching rates for Queensland are relatively low, declared switching behaviour in South East Queensland is more in line with other deregulated states.

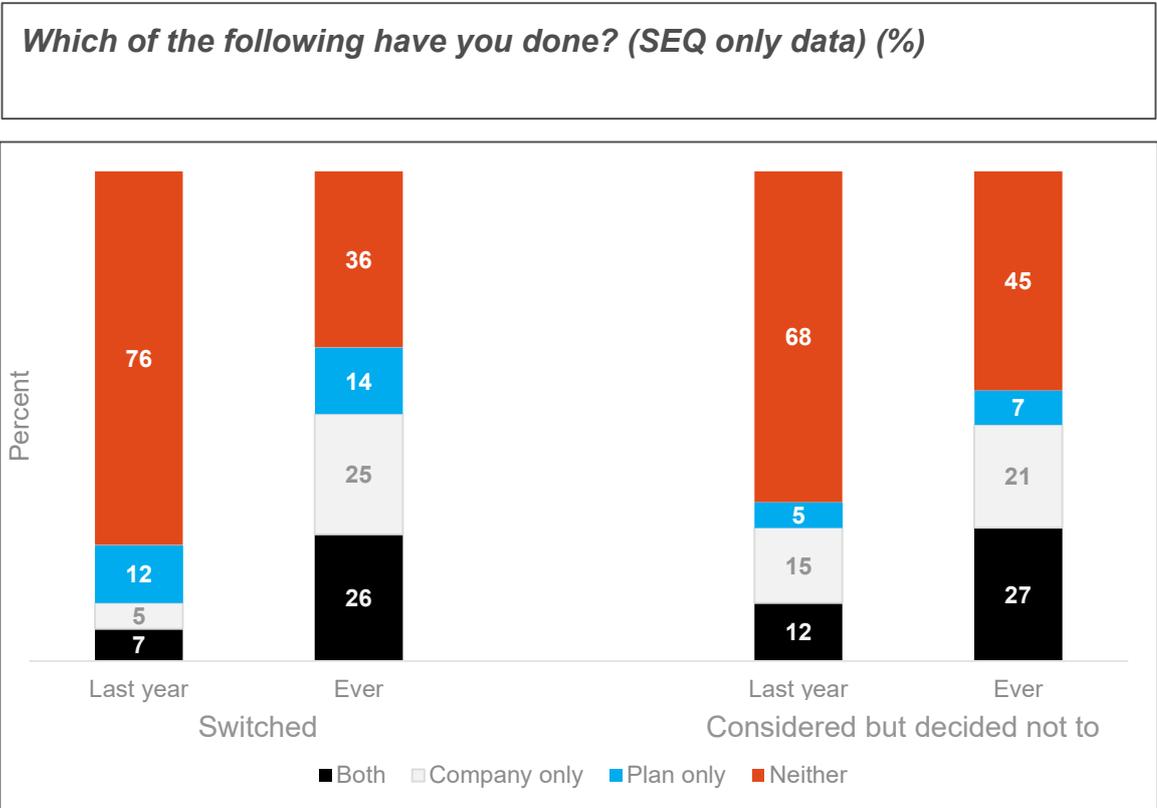
- 18% of all Queensland household consumers report having switched companies or plans in the past year, while 26% say they considered it last year but decided not to at that time.
- 47% report that they have never switched energy companies or plans.

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



Base: Consumers in QLD (n=320)

- In the deregulated part of the state, 24% report having switched in the past year and 36% say they have never switched.



Base: Consumers in SEQ (n=228)

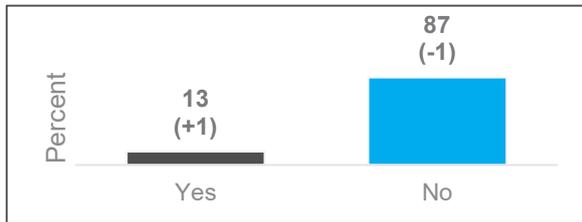


Reasons for considering switching

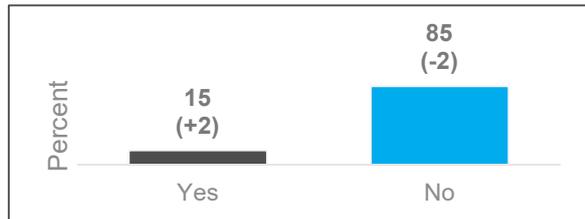
Low value for money is a major reason for customers to look to switch energy companies.

- 30% 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 15% 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? (%)

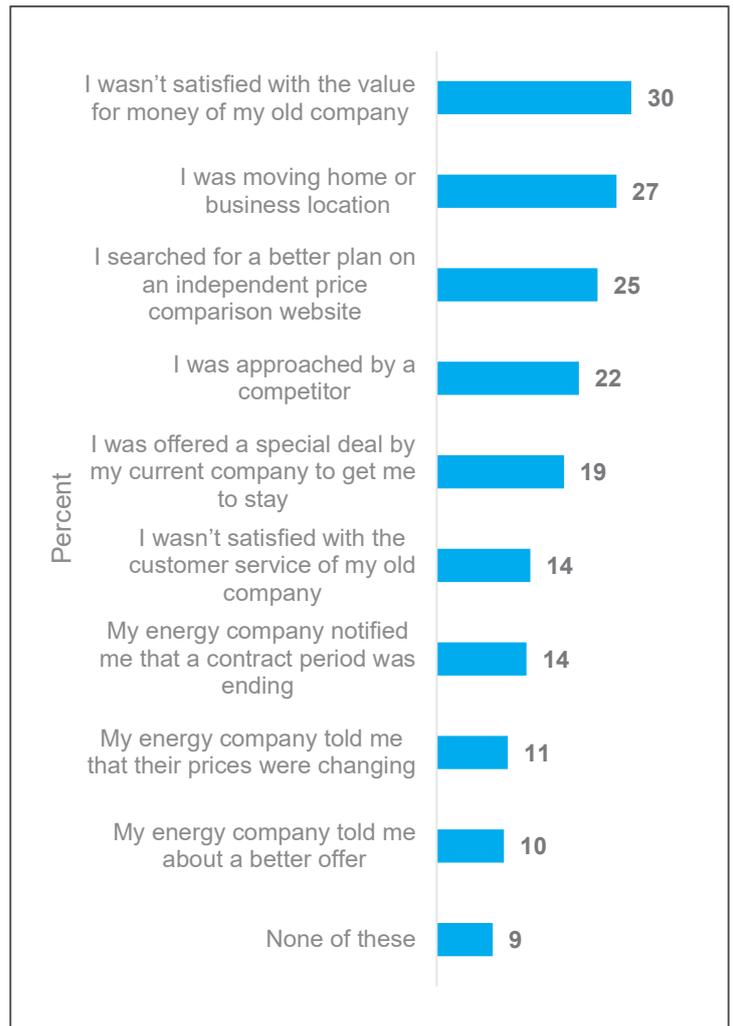


Base: Consumers in QLD (n=320)



Base: SE Consumers in QLD (n=228)

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=175)

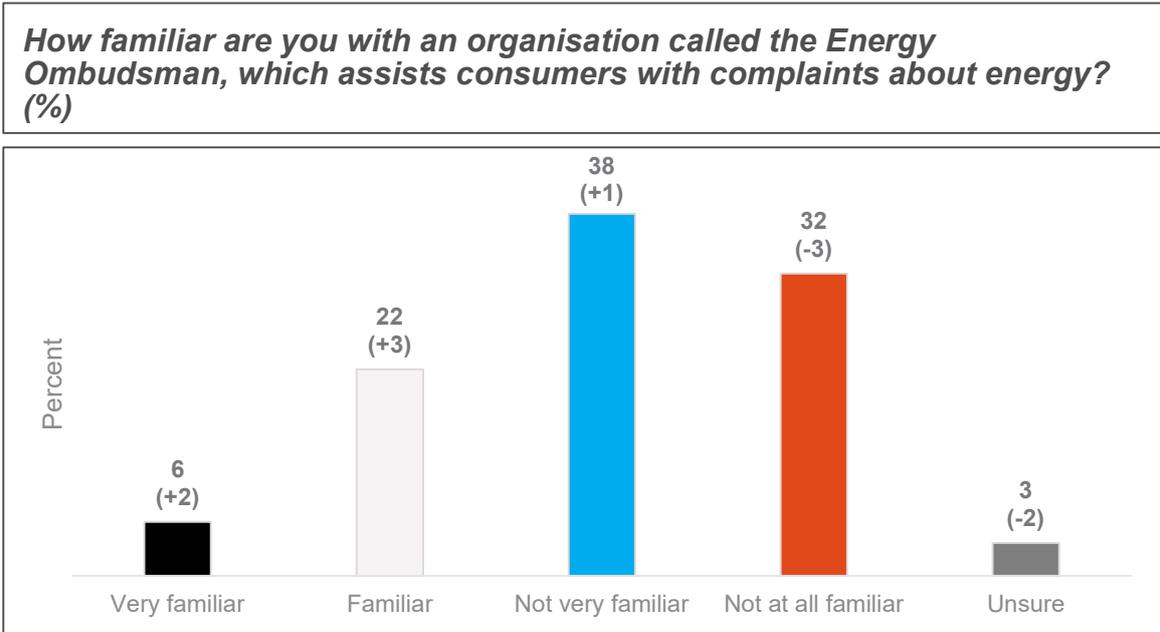


Other

Awareness of the Energy Ombudsman

28% say they are familiar with the Energy Ombudsman in Queensland.

- Familiarity with the Ombudsman amongst Queensland household consumers increased 5%.



Base: Consumers in QLD (n=320)



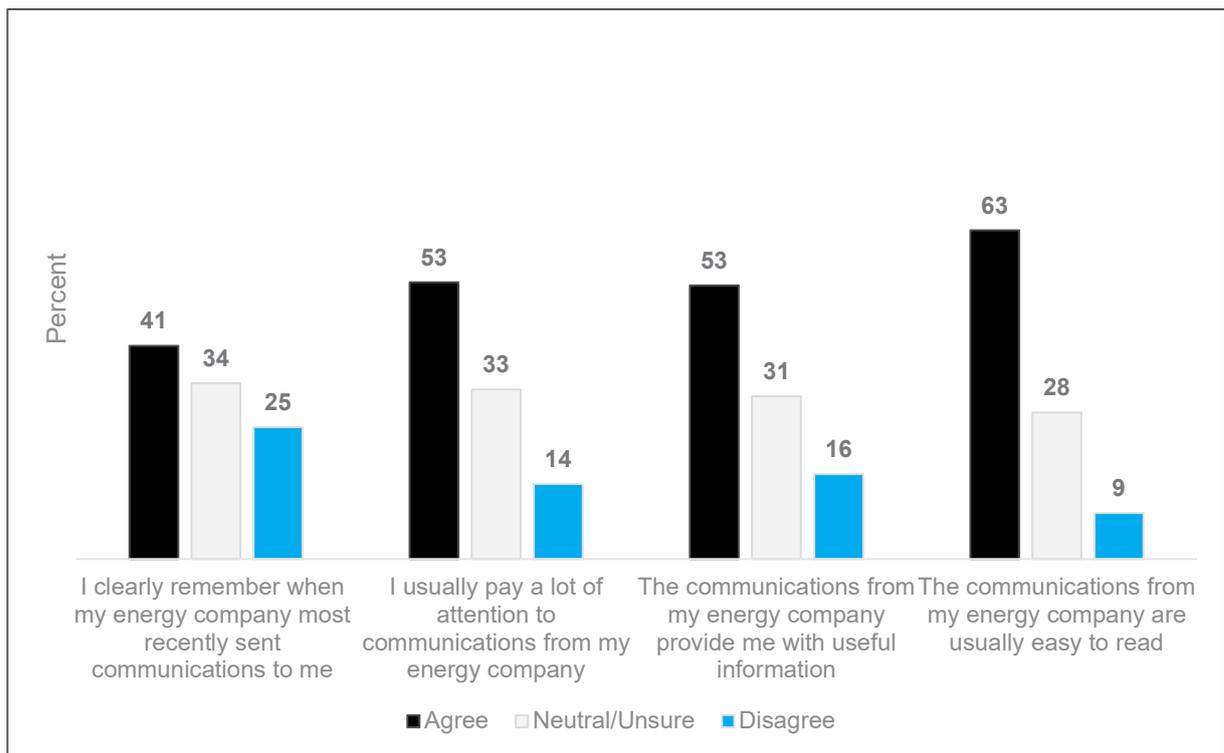
Other

Communications from energy providers

Only two-fifths of Queensland household consumers agree that they clearly recall the most recent communications from their energy company.

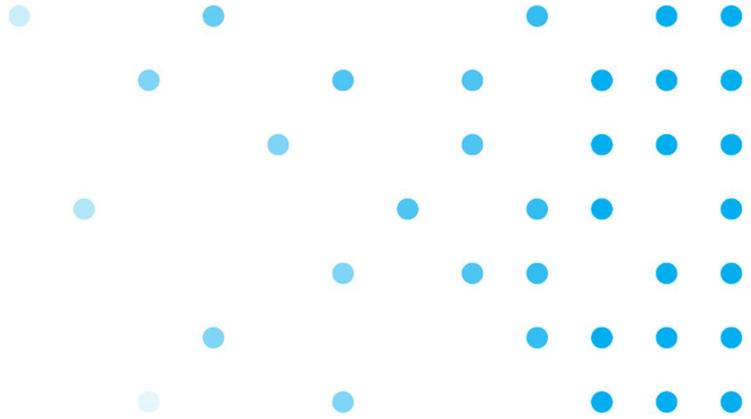
- Only 63% of Queensland consumers agree that communications from their energy company are easy to read.
- 53% agree they pay a lot of attention to communications from their energy company.
- Only 53% agree that the communications from their energy company provide useful information.
- 41% of Queensland household consumers 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 QLD (n=320)

South Australia





Overall satisfaction

Overall satisfaction has increased among South Australian household consumers.

- 78% say they are satisfied (up 7%).

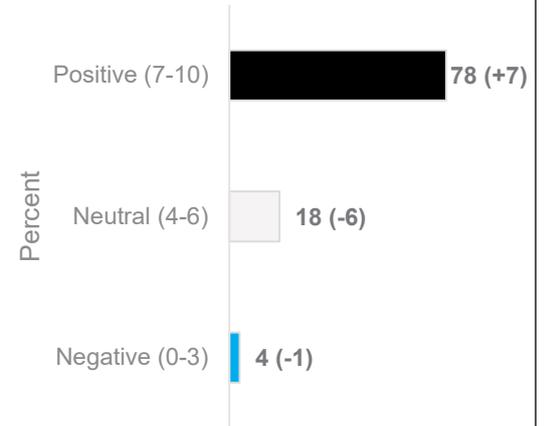
There has also been an increase in satisfaction with the level of competition.

- 58% of South Australian household consumers are satisfied with the level of competition in the energy market (up 8%).

Satisfaction

Overall Satisfaction

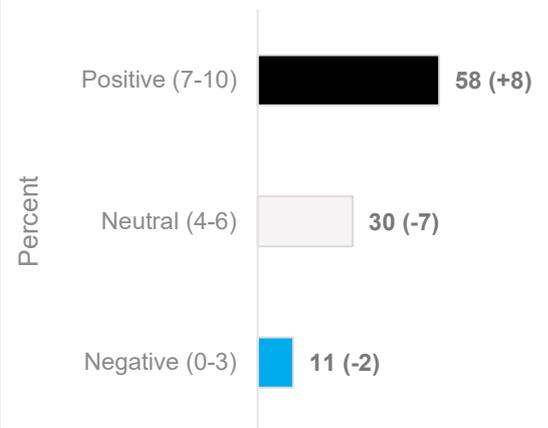
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in SA (n=299)

Satisfaction with competition

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



Base: Consumers in SA (n=299)

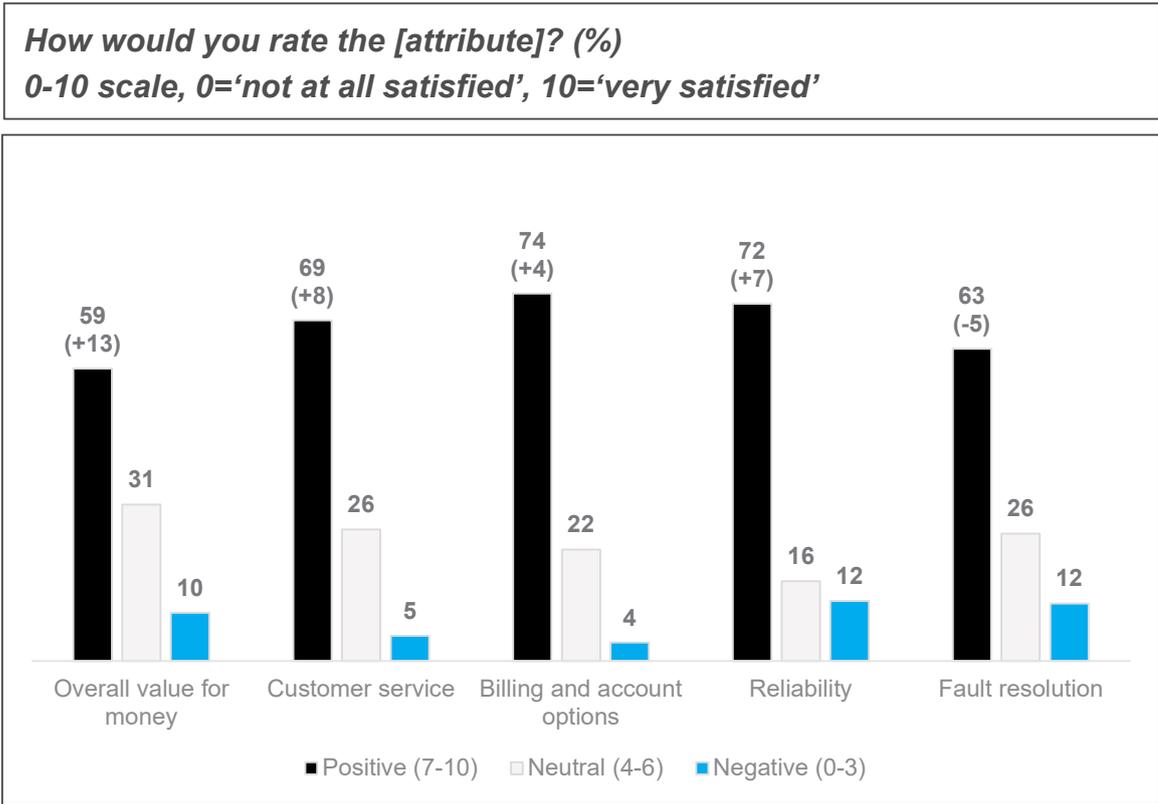


Satisfaction

Satisfaction with electricity

Satisfaction with most electricity measures increased – particularly overall value for money.

- Satisfaction with the overall value for money of electricity increased 13% from last year (to 59%).
- Satisfaction with customer service increased by 8% (to 69%).
- Satisfaction with reliability also increased by 7% (to 72%).
- Satisfaction with billing and account options is still the highest rated metric at 74%.
- Of those who experienced a power outage, 63% are satisfied with the fault resolution (down 5%).



Base: Consumers in SA with electricity supply (n=299)
Base for fault resolution: Those in SA who had a power outage or rated 0 to 9 satisfaction with outage (n=156)

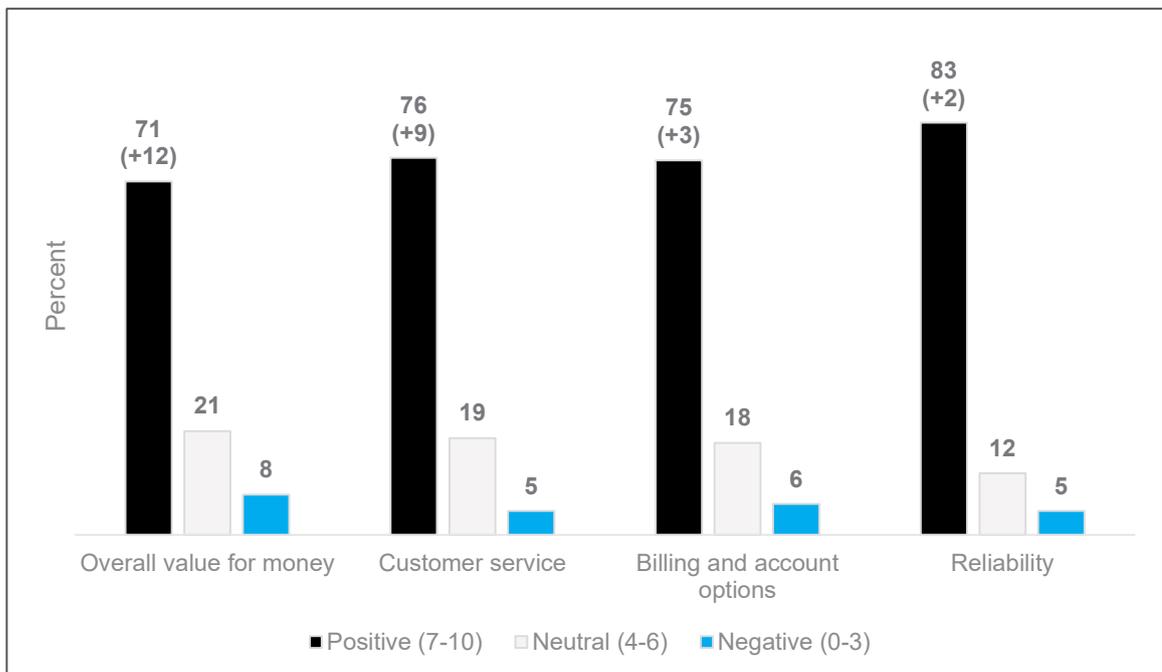


Satisfaction with gas

South Australian households' satisfaction with their gas service has increased.

- 71% of South Australian household consumers who have gas are satisfied with the overall value for money (up 12%).
- 76% are satisfied with the customer service of their gas supplier (up 9%).
- 75% are satisfied with their billing and account options.
- 83% are satisfied with the reliability of their gas services.

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



Base: South Australian gas consumers (n=211)

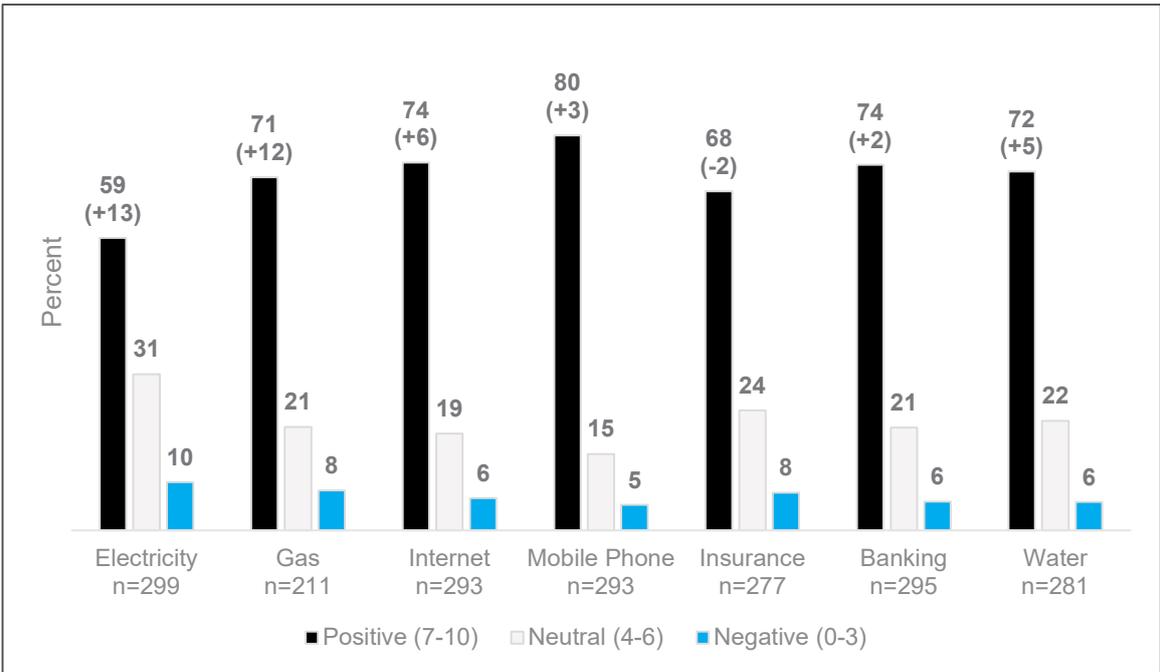


Satisfaction with utilities and services

Significant increases in satisfaction with the value for money of electricity and gas services has narrowed the gap to other utilities and services.

- Consumer satisfaction with the value for money of their electricity services is up 13% (to 59%), while gas increased by 12% (to 71%).
- Satisfaction with the value for money of electricity still lags behind all comparable services.

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



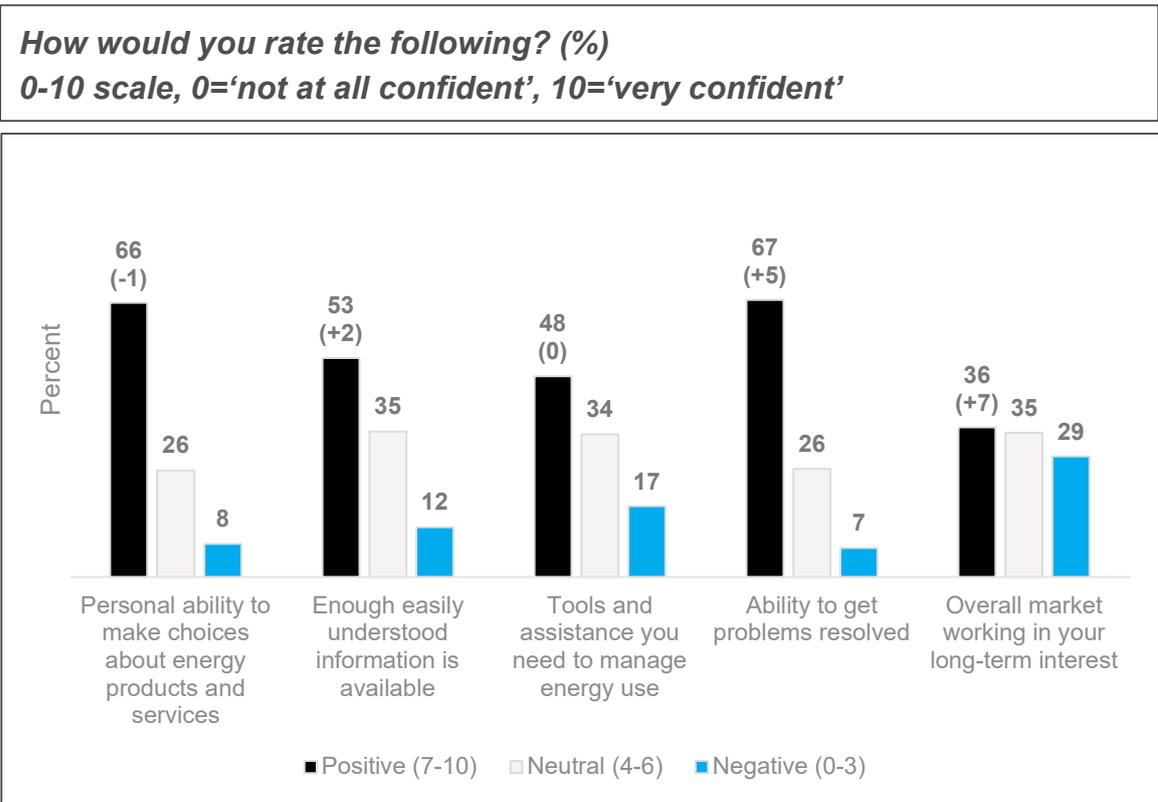
Base: Consumers in SA with these services



Confidence in information, tools and a working market

Only a third of South Australians are confident that the market is working in their long-term interest.

- Overall confidence that the market is working in consumers' interests is up 7% (to 36%).
- Consumer confidence in their ability to resolve issues (67%) and make choices (66%) continues to be stronger than their belief that the information available to them is easy to understand (53%) and that tools are available to assist them (48%).



Base: Consumers in SA (n=299)



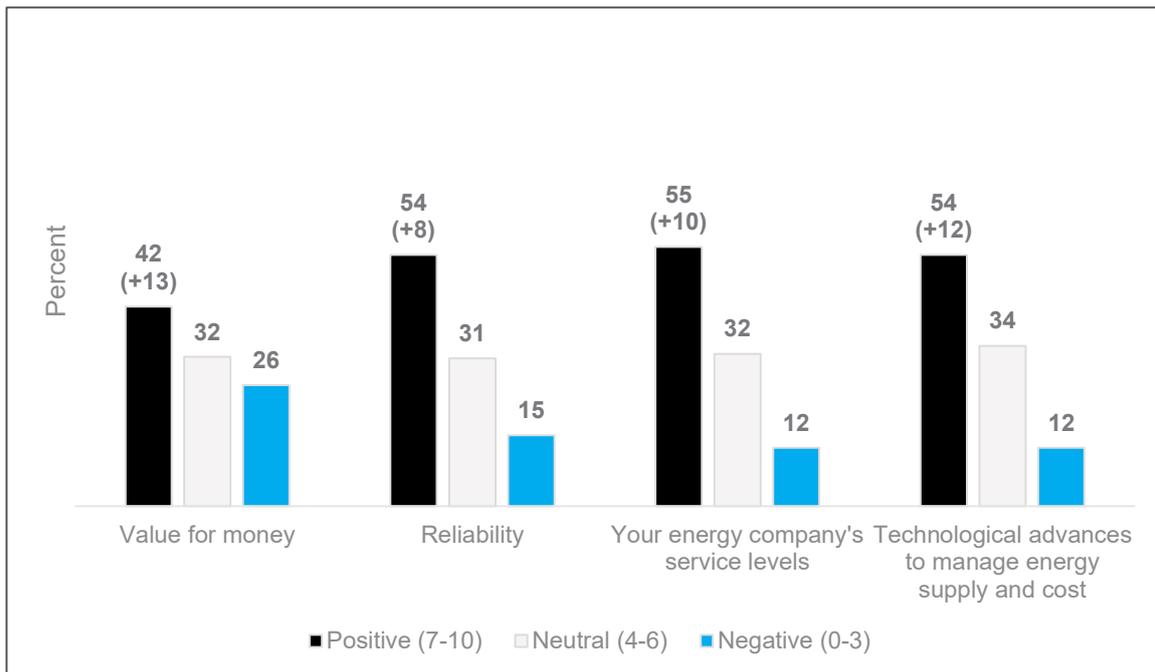
Confidence in long term outcomes

There has been a substantial increase in South Australian household consumers' confidence that the market will deliver better long-term outcomes in the future.

- Confidence that consumers will see better overall value for money in the future increased by 13% from a low base (to 42%).
- Confidence in better technological advances in the future to manage energy supply and cost has increased by 12% (to 54%).
- Confidence that service levels will improve increased by 10% (to 55%).
- Confidence that energy reliability will improve increased by 8% (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...? (%)

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



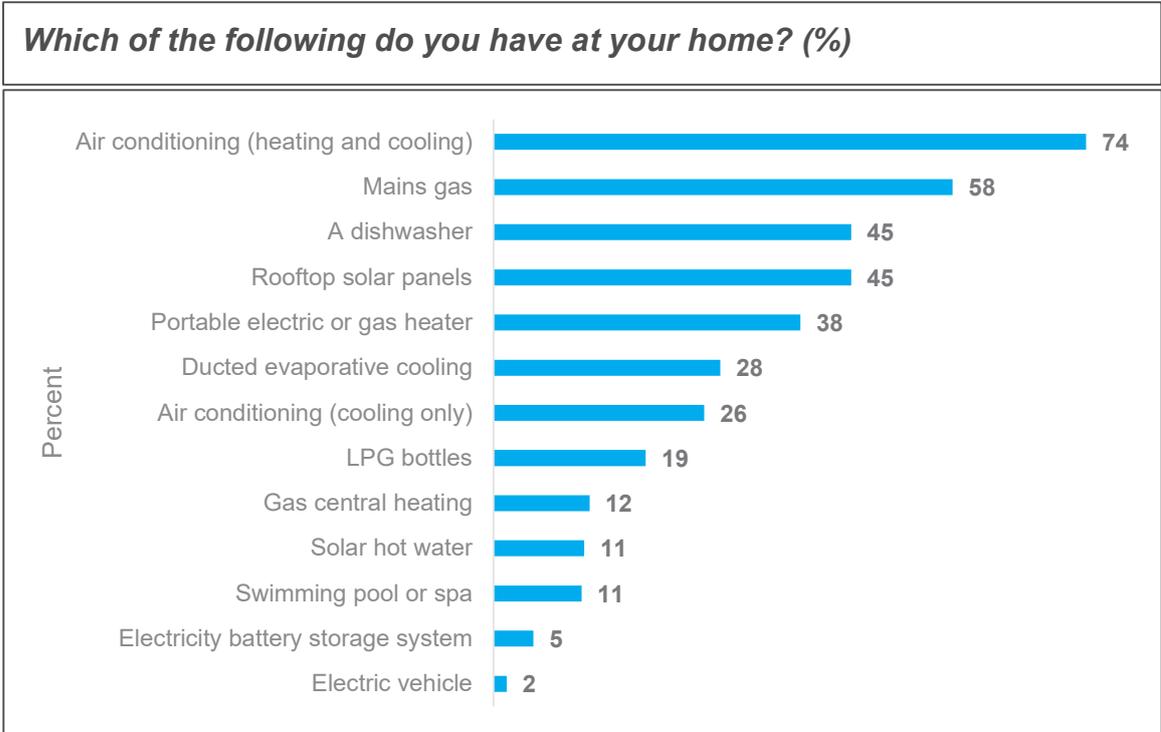
Base: Consumers in SA (n=299)



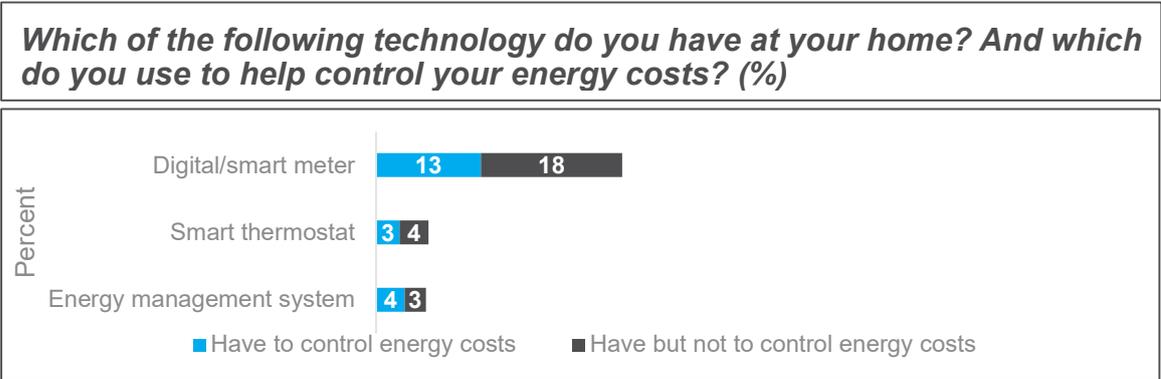
Uptake of technologies

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

- 45% of households in South Australia report having rooftop solar and 74% say they have air conditioning that they use for heating and cooling.
- 31% say they have a smart/digital meter (up 5%), and the proportion of total households who say they use a digital/smart meter to manage their energy use and costs has increased from 5% to 13%.



Base: Consumers in SA (n=299)



Base: Consumers in SA (n=299)

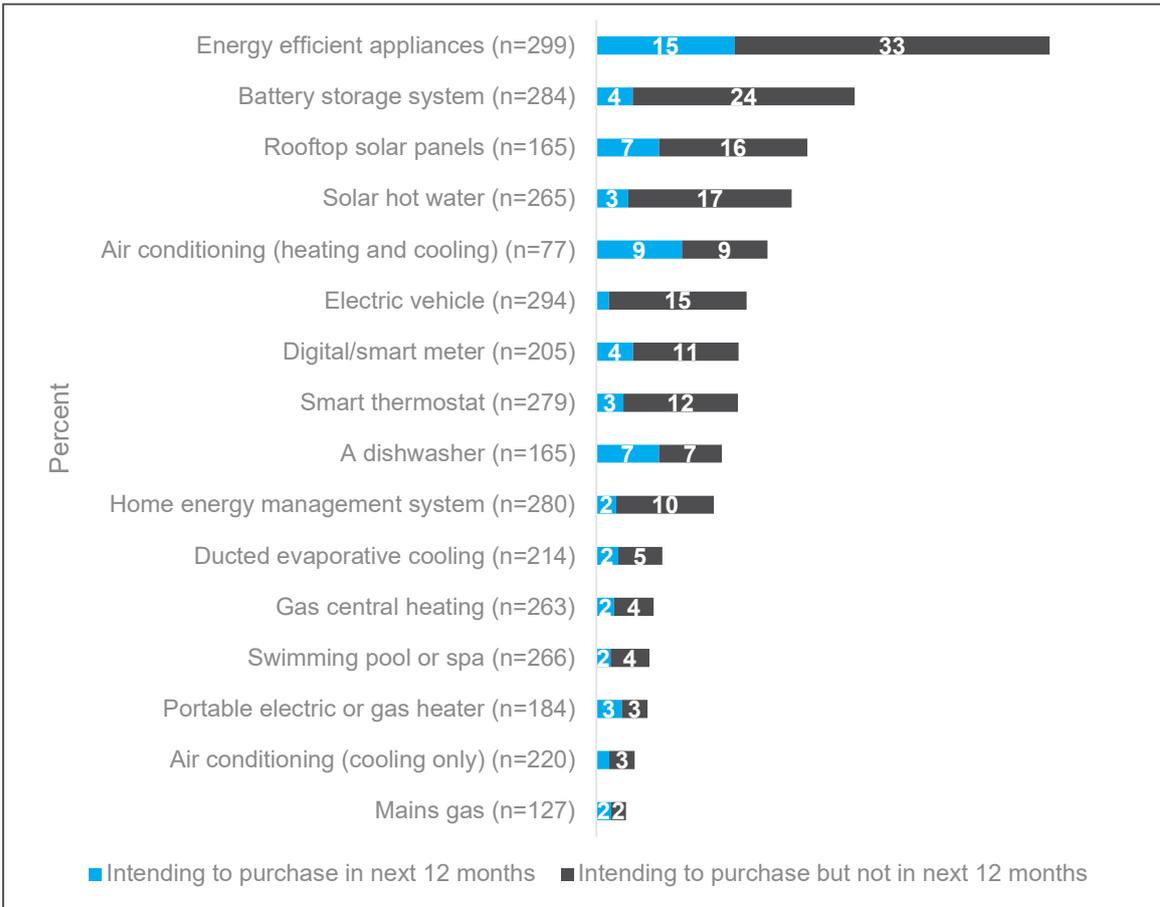


Future uptake of technologies

Interest in energy technology has reduced in South Australia

- 48% say they are considering buying energy efficient appliances (down 10%).
- 28% of those who do not currently have a battery storage system are considering it including 4% within the next year.
- 23% of those who do not have rooftop solar say they are considering solar panels.
- Of those households who report having solar panels, 43% expressed interest in adding a battery storage system.

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



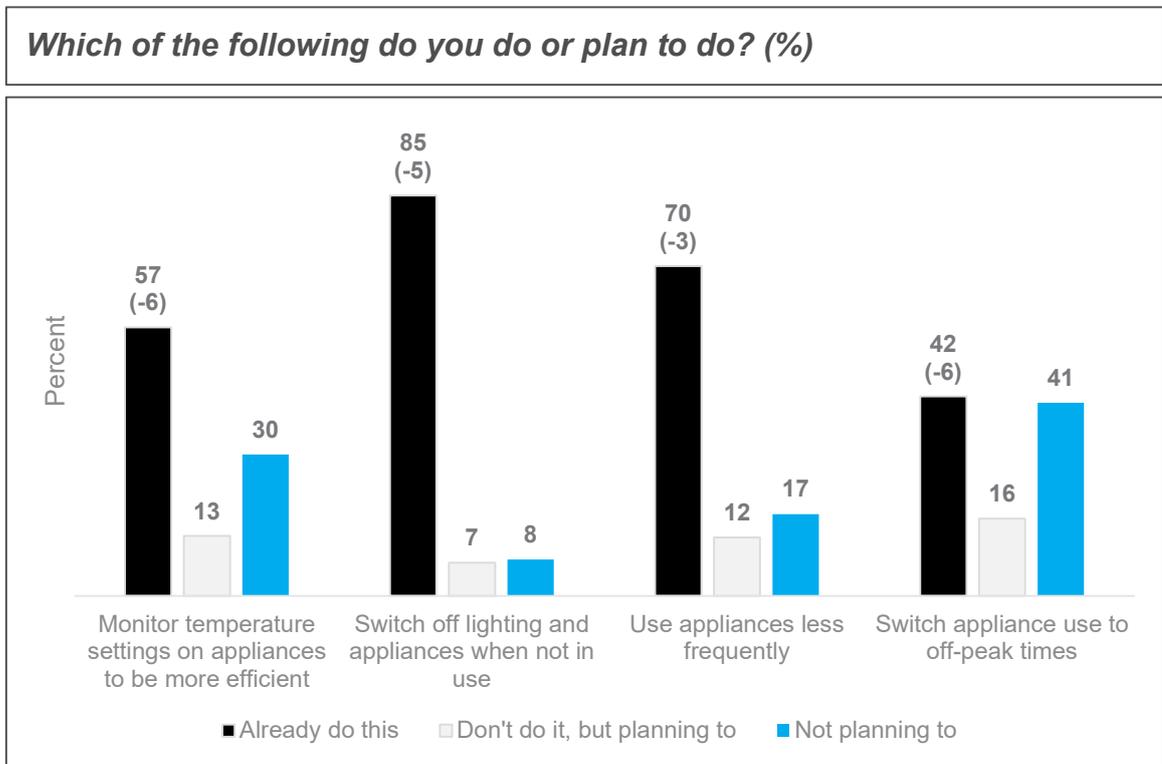
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in South Australia



Energy saving practices

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

- 57% say they monitor temperature settings on their appliances (down 6%).
- 42% say they have already switched appliance use to off-peak times (down 6%).
- 85% say they already switch off lighting and appliances when not in use (down 5%).
- 70% use appliances less frequently.



Base: Consumers in SA (n=299)

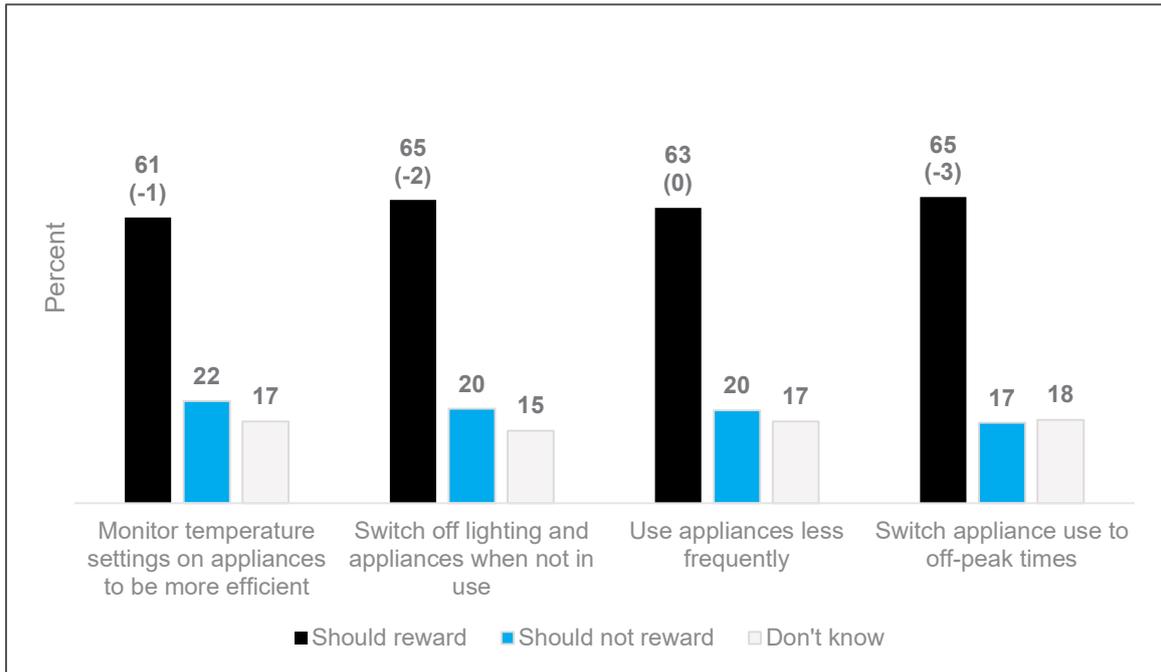


Reward for reducing energy use

Support for rewarding decreased energy usage is stable in South Australia.

- 65% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times.
- 65% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use.
- 63% 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=299)

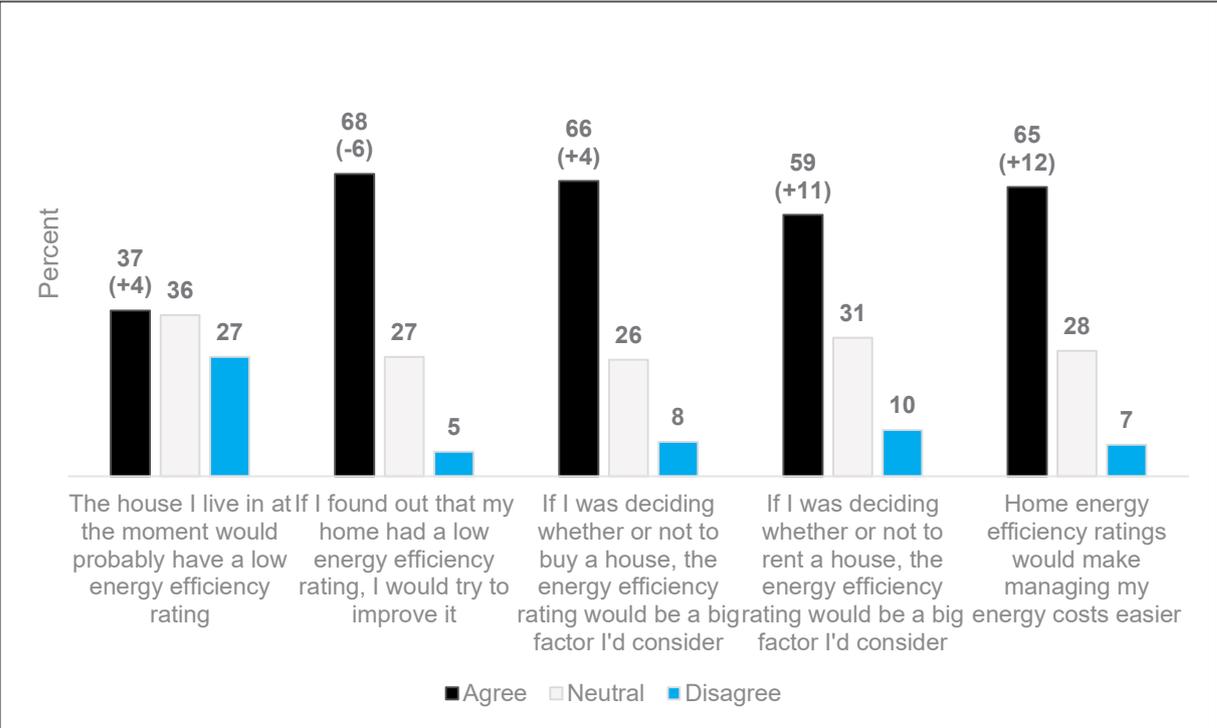


Housing energy efficiency

Only one in four household consumers in South Australia thinks the house they currently live in would have an energy efficiency rating better than ‘low’.

- 68% of home-owners say they would try to improve their home’s energy efficiency rating if they found out it had a low rating (down 6%).
- 66% said an energy efficiency rating would be a big factor they would consider when buying a house.
- 65% said a home energy efficiency rating would make managing their energy costs easier (up 12%).
- 59% of renters said an energy efficiency rating would be a big factor they would consider when renting a house (up 11%).
- 37% believe their house would probably have a low energy efficiency rating, while 36% cannot say whether their home was energy efficient.

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=299)

Base for 'I would try to improve my home energy efficiency': Home-owners in SA (n=202)

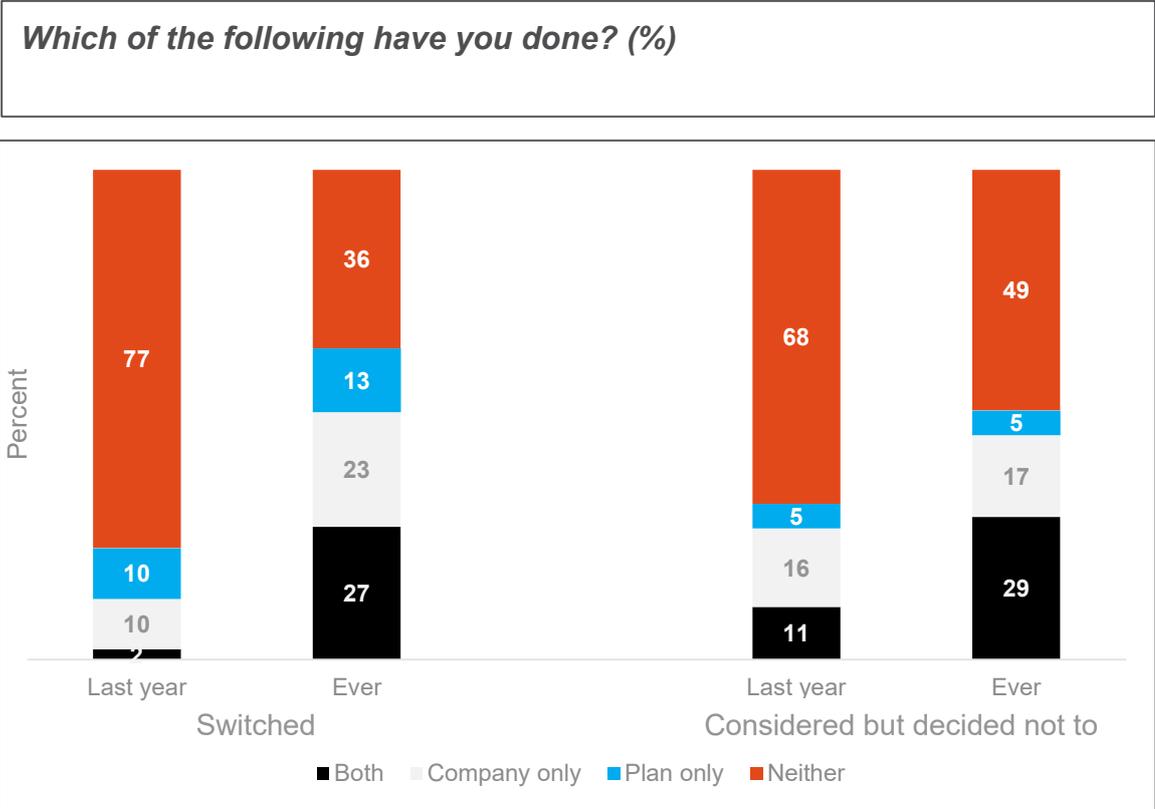
Base for 'consider energy rating when renting': Renters in SA (n=87)



Switching behaviour

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

- 22% report switching in the past year, while another 32% say they considered switching in the past year but decided not to.
- 36% say they have never switched energy companies or plans.



Base: Consumers in SA (n=299)



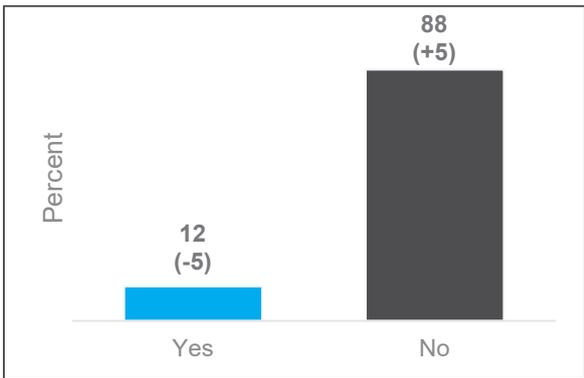
Activity

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.

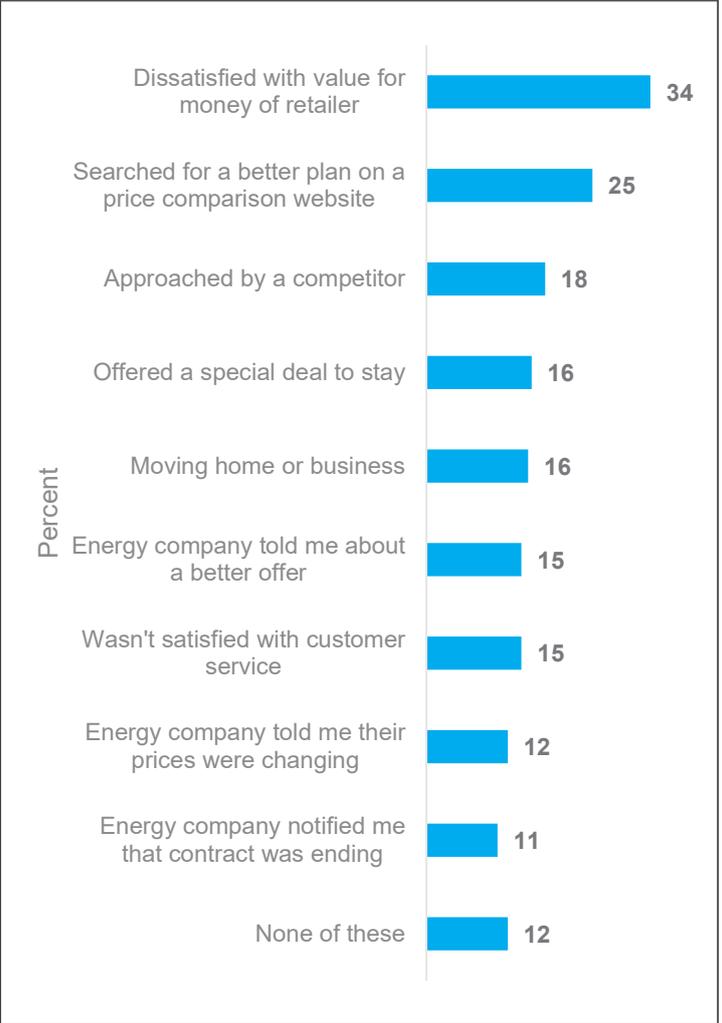
- 34% of those who switched companies say they were not satisfied with the value for money of the service provided by their supplier.
- 25% say they looked at a price comparison website the last time they considered switching.
- 12% plan to switch energy companies or plans in the next year (down 5%).

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



Base: Consumers in SA (n=299)

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=193)



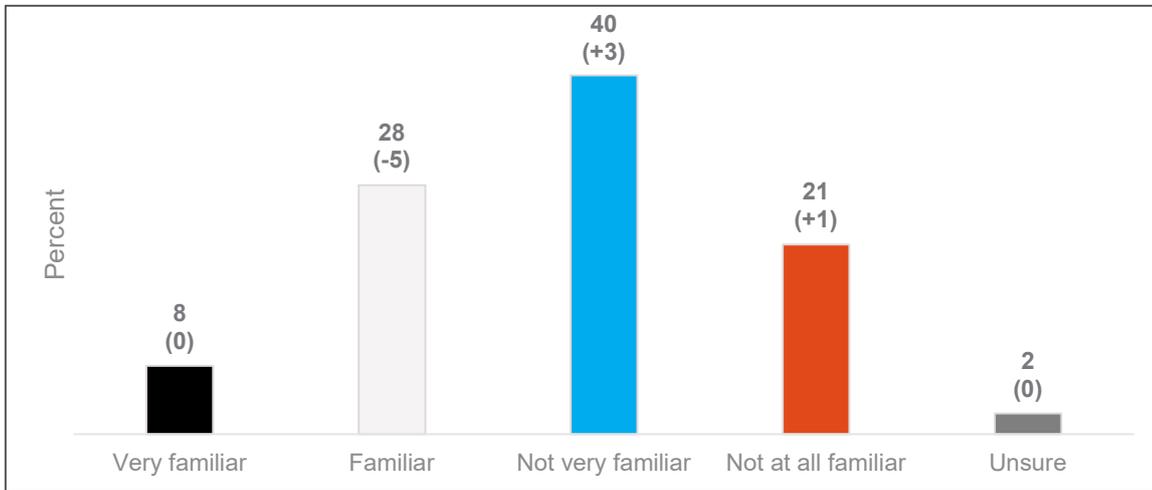
Other

Awareness of the Energy Ombudsman

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

- Familiarity with the Ombudsman amongst South Australian household consumers decreased 5%.

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



Base: Consumers in SA (n=299)



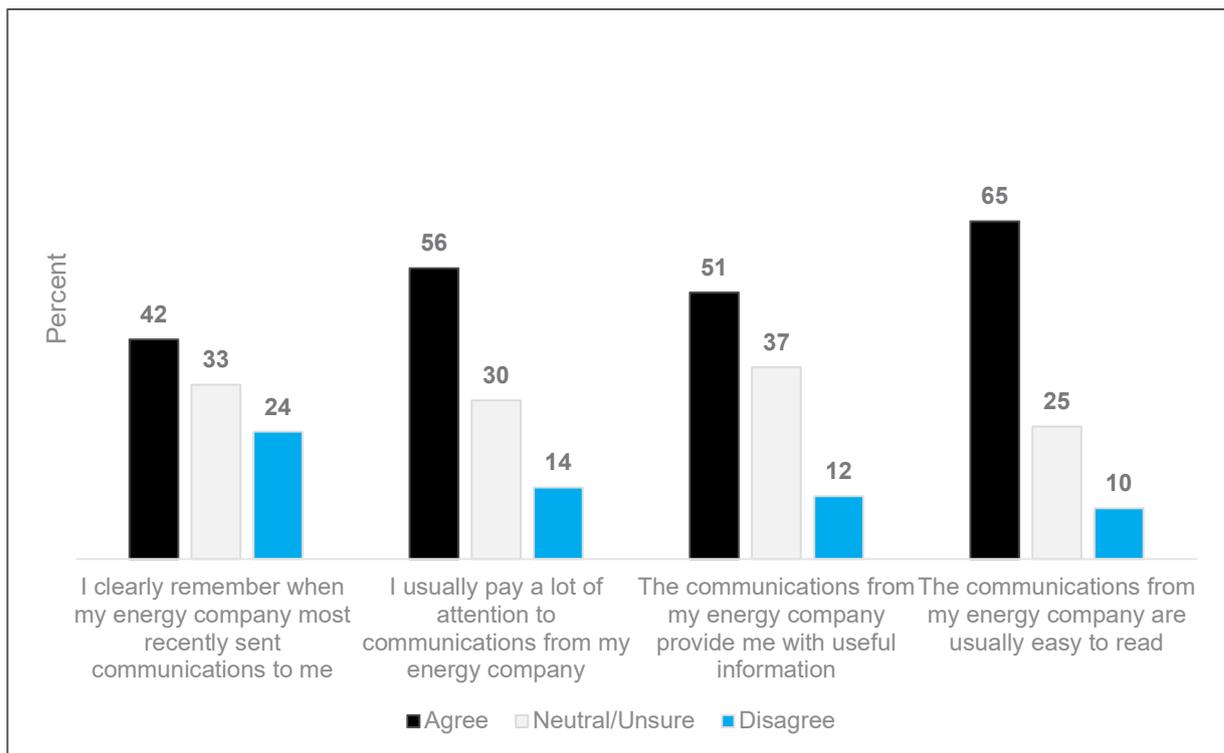
Other

Communications from energy providers

Only two-thirds of South Australian household consumers agree that the communications they receive are easy to read.

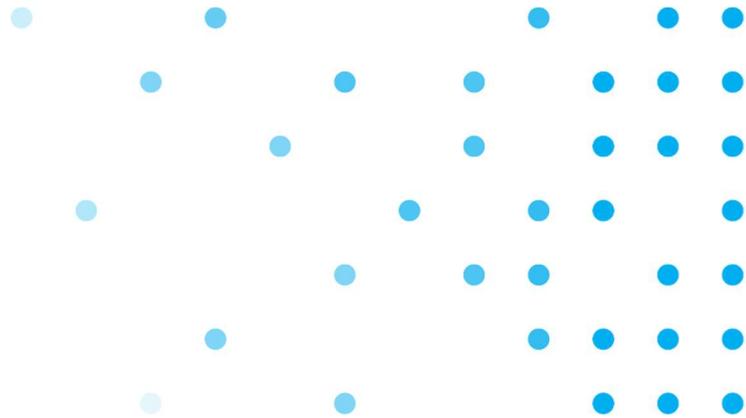
- 65% of South Australian consumers agree that communications from their energy company are easy to read.
- 56% agree they pay a lot of attention to communications from their energy company.
- Only 51% agree that the communications from their energy company provide useful information.
- 42% of South Australian household consumers 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=299)

Tasmania





Overall satisfaction

Overall satisfaction with energy services has increased among Tasmanian household consumers.

- 79% say they are satisfied (up 12%).

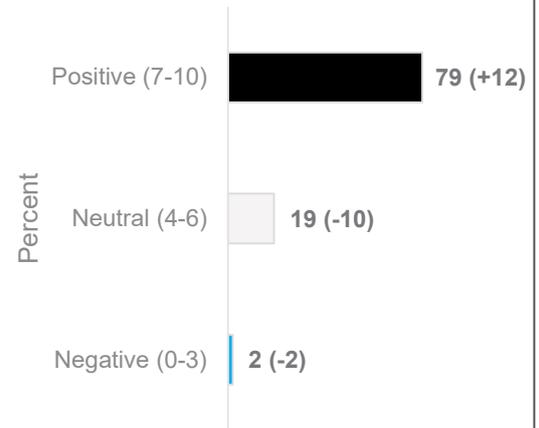
Satisfaction with levels of competition in Tasmania increased from a low level.

- 26% say they are satisfied (up 15%).

Satisfaction

Overall Satisfaction

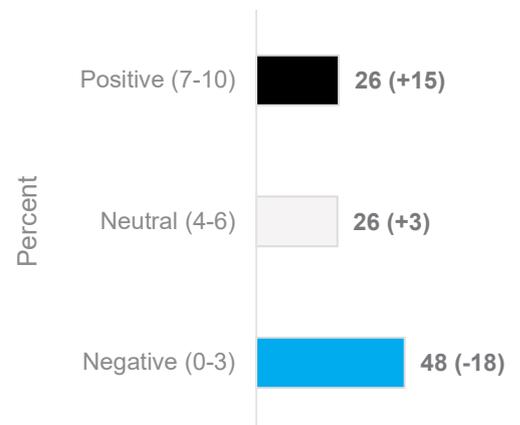
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in 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)



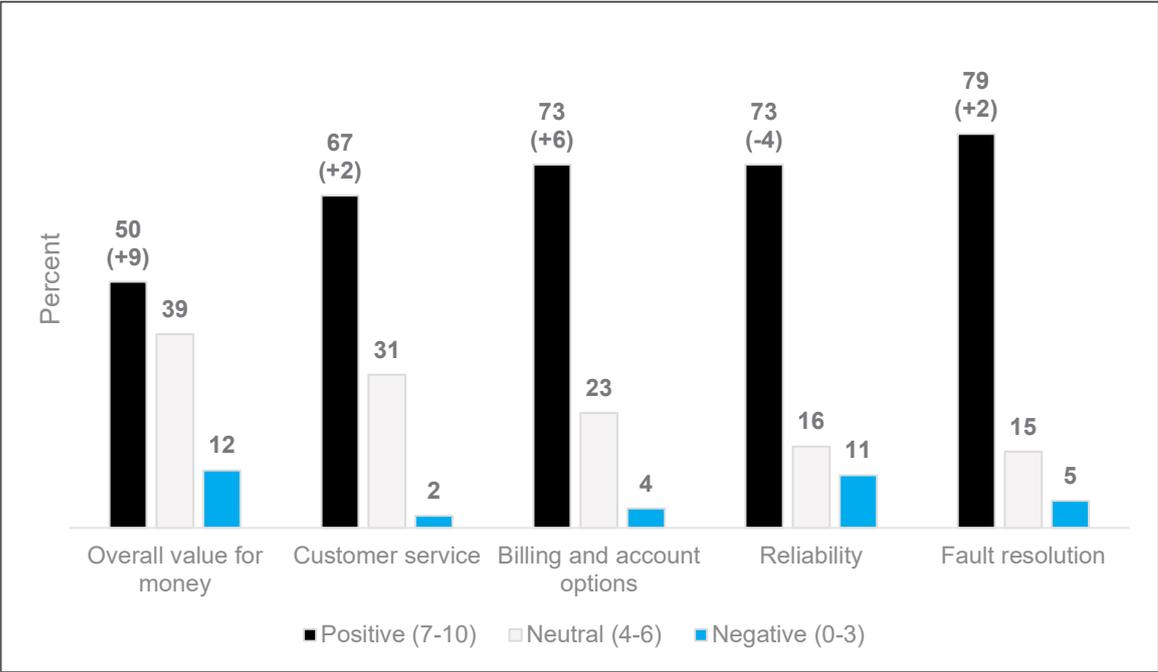
Satisfaction

Satisfaction with electricity

The proportion of Tasmanian household electricity consumers satisfied with the value for money of their electricity services has reached 50%.

- Satisfaction with overall value for money increased 9% (to 50%), but this result still lags other measures of satisfaction.
- Satisfaction with the available billing and account options is now 73% (up 6%).
- Of those who experienced a power outage, 79% were satisfied with the fault resolution.
- 73% of Tasmanian household consumers are satisfied with the reliability of electricity supply.
- 67% of Tasmanian household consumers are satisfied with the customer service they receive.

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=111)



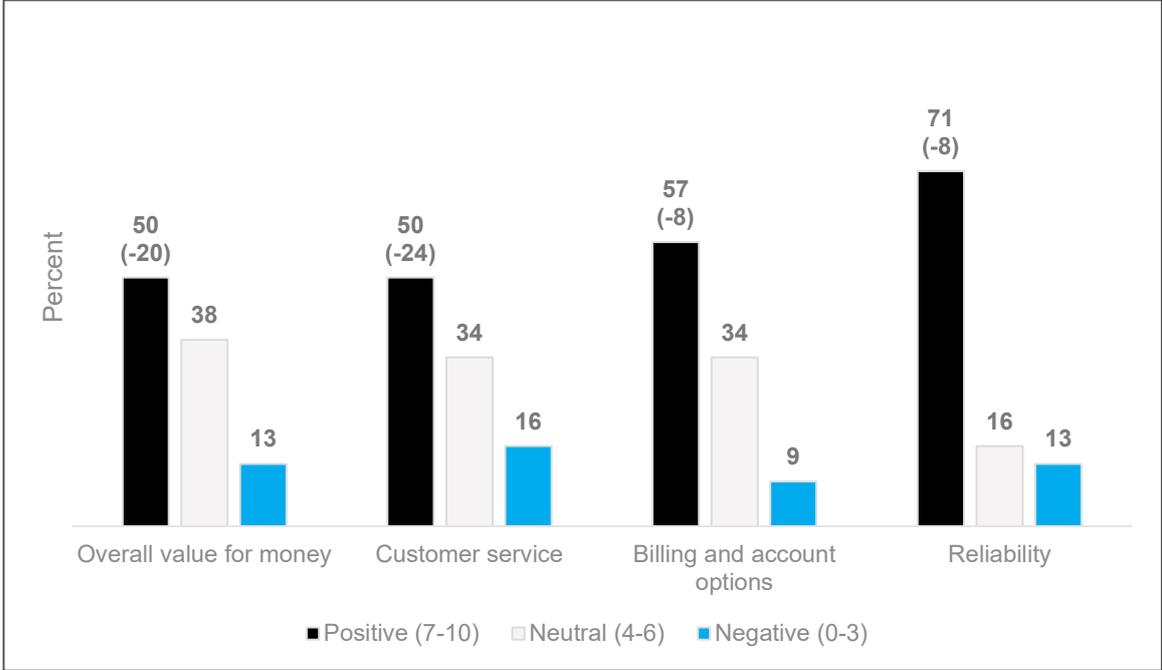
Satisfaction

Satisfaction with gas

Tasmanian household gas consumers are less satisfied across all measures.

- 50% are satisfied with the customer service of their energy company (down 24%).
- 71% are satisfied with the reliability of their gas services (down 8%).
- 57% are satisfied with the available billing and account options (down 8%).
- 50% are satisfied with the overall value for money of their gas service (down 20%).

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=56)
Note: Small sample size – results are indicative only



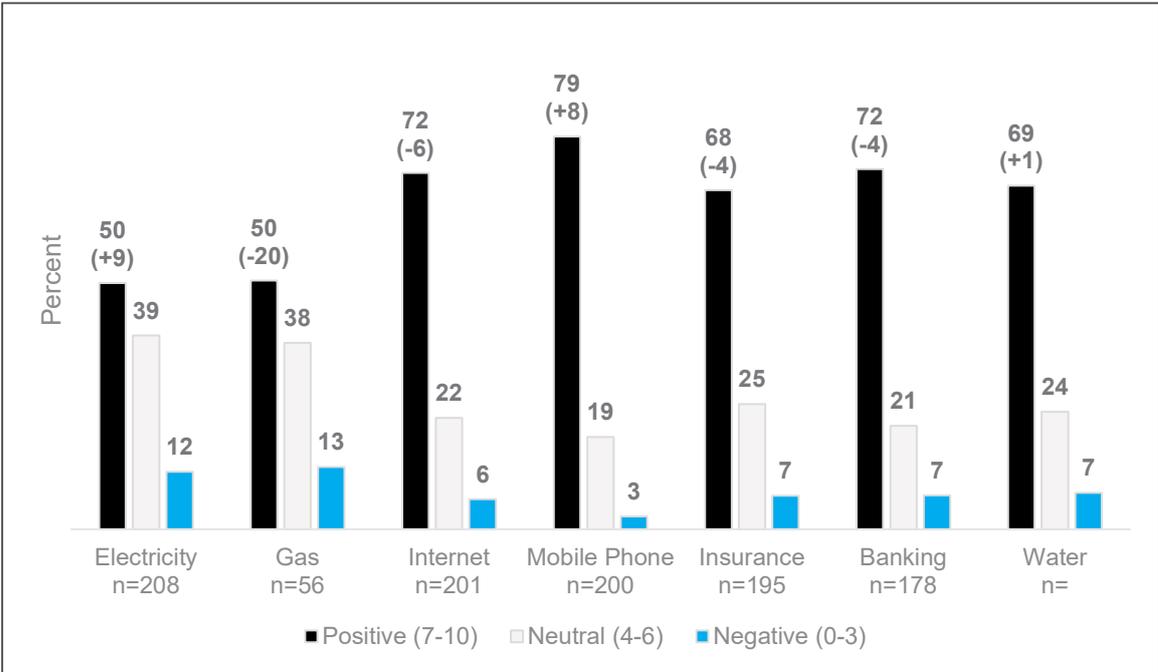
Satisfaction

Satisfaction with utilities and services

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

- Satisfaction with electricity value for money increased by 9% (to 50%).
- Satisfaction with gas services overall fell 20% (to 50%).

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



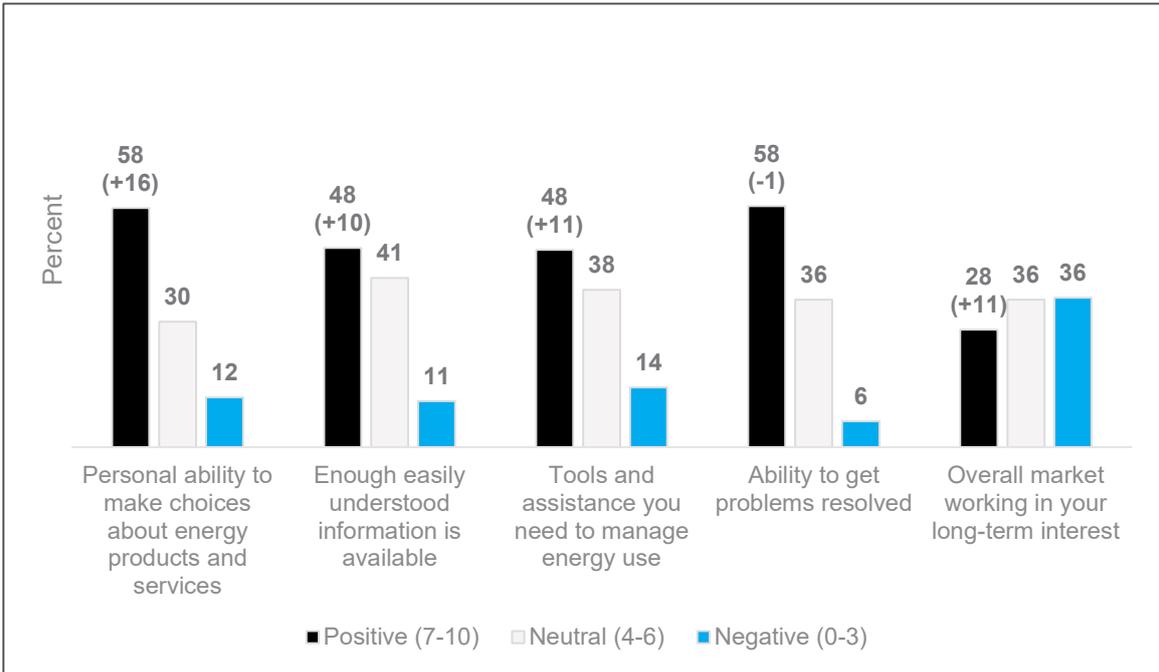
Confidence

Confidence in information, tools and working market

Three-fifths of Tasmanian household consumers are confident in their personal ability to make choices about energy products and services.

- Consumers’ confidence in their ability to make choices about energy products and services increased 16% (to 58%).
- Confidence in their ability to get problems resolved was steady at 58%.
- Consumer confidence that there is enough easily understood information and in tools to manage energy use both saw significant increases to reach 48%.
- Tasmanian households’ confidence the market is working in their long-term interest increased 11% (to 28%).

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



Base: Consumers in TAS (n=208)



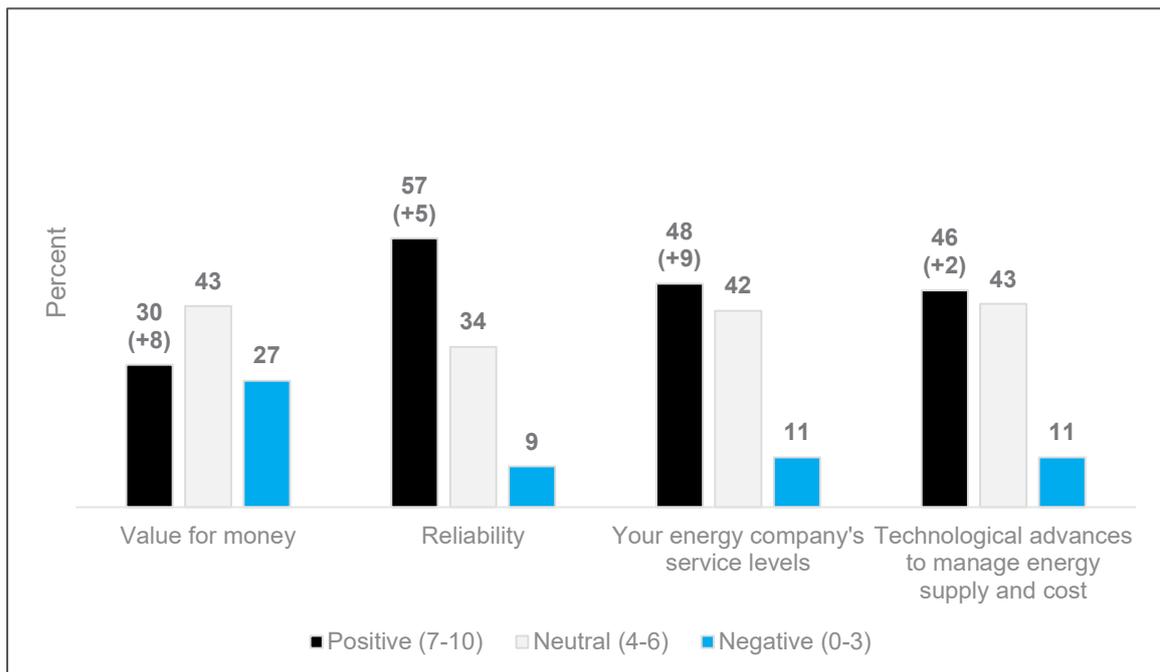
Confidence in long term outcomes

Confidence that market outcomes will improve in the future has increased, but confidence the market will provide better value for money outcomes in the future continues to lag other measures.

- 57% are confident that the market will deliver greater reliability (up 5%).
- Confidence in future service levels increased 9% (to 48%).
- 46% are confident that the market will deliver technological advances to manage energy supply and cost.
- Consumer confidence that the market will deliver better value for money outcomes in the future is comparably low (up 8% to 30%).

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'



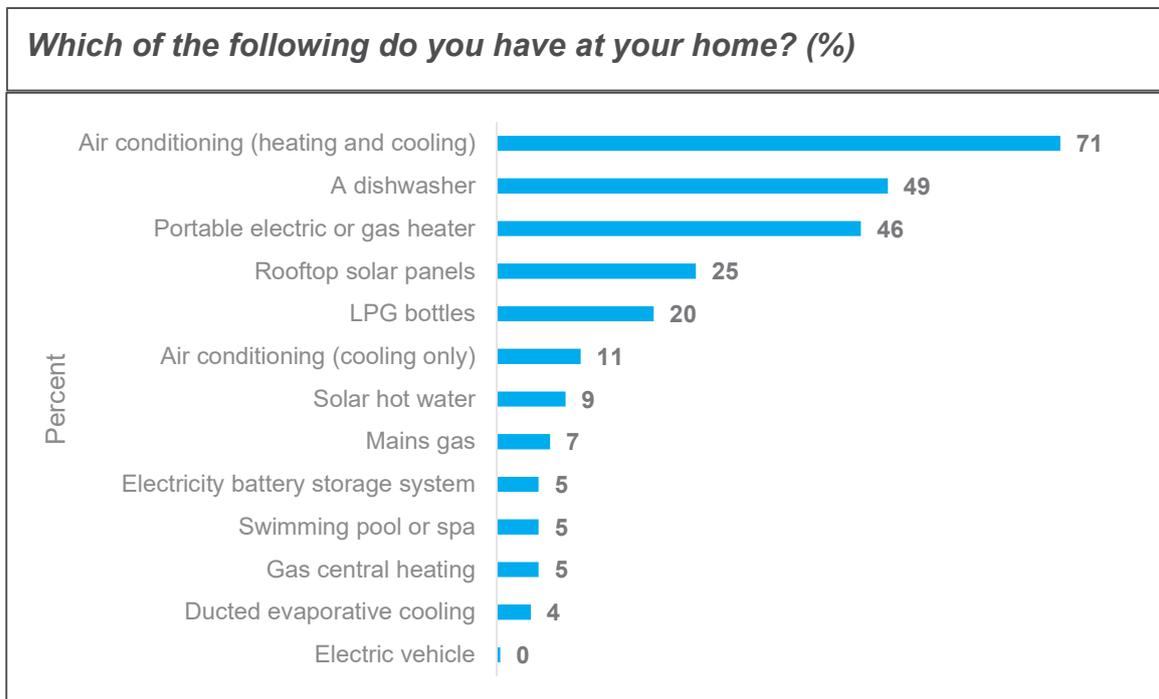
Base: Consumers in TAS (n=208)



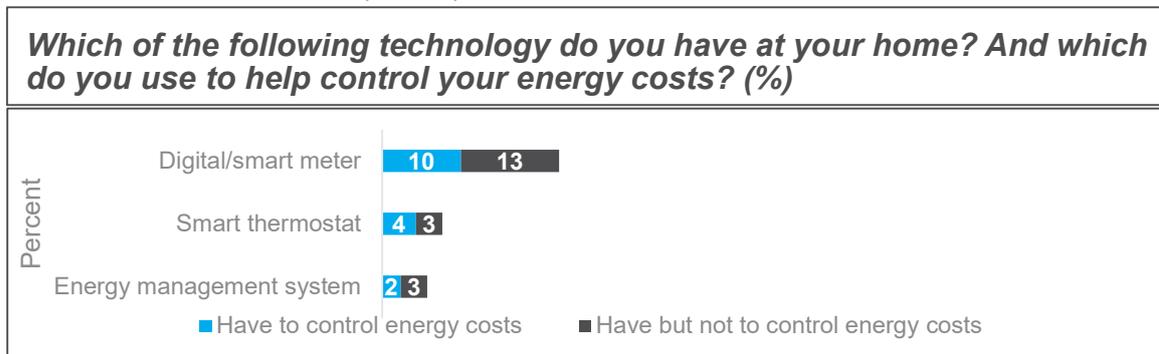
Uptake of technologies

Only 5% of household consumers in Australia’s southern-most state report having gas central heating.

- 46% say they have a portable heater.
- 71% say that they have air conditioning that they use for both heating and cooling.
- 23% say they have a smart/digital meter but only 10% say they use it to control their energy use and costs.



Base: Consumers in TAS (n=208)



Base: Consumers in TAS (n=208)

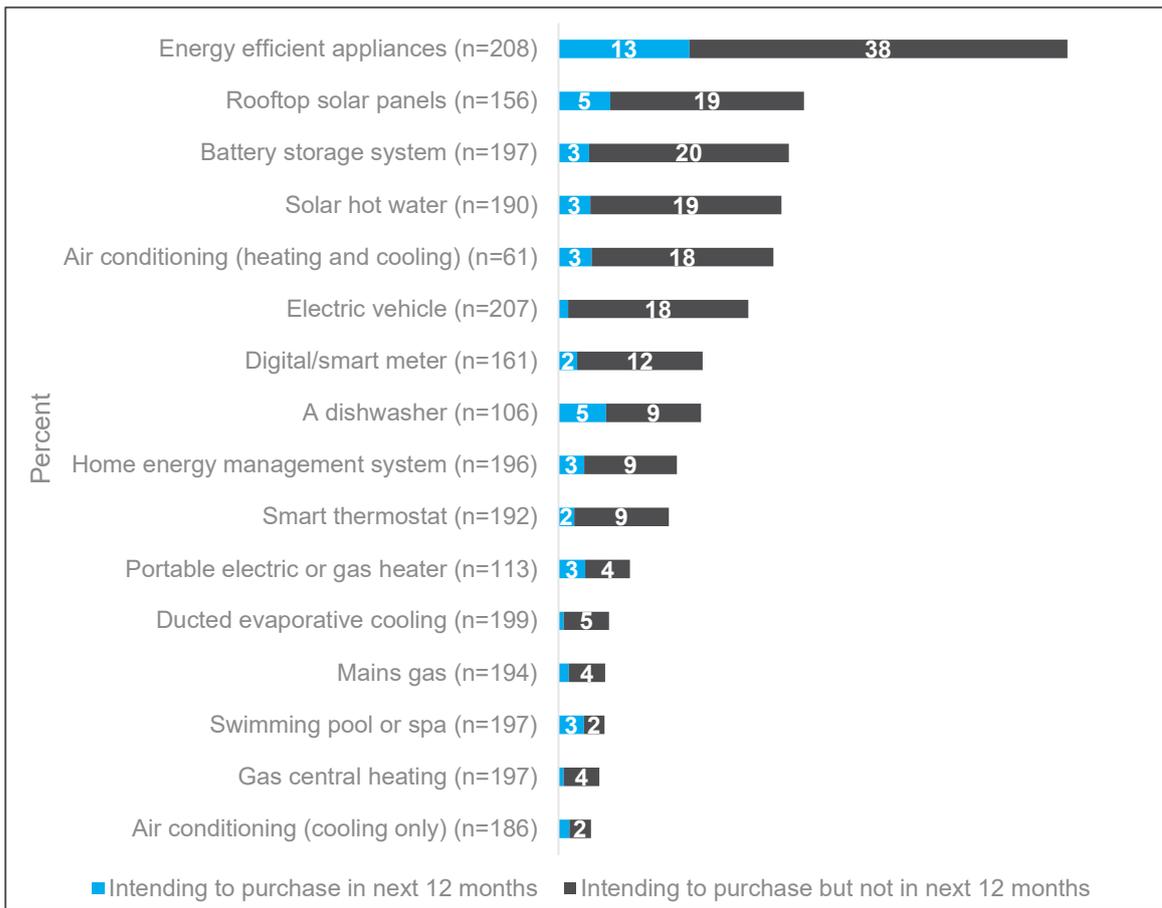


Future uptake of technologies

Interest in buying energy technology has decreased.

- 51% are considering buying energy efficient appliances (down 14%).
- Just 5% say they intend to install rooftop solar in the year ahead (the lowest of any state or territory), but 19% say they are considering it beyond that time period.
- 22% are considering purchasing solar hot water.
- Of those households who reported having solar panels, 45% express interest in adding a battery storage system.

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



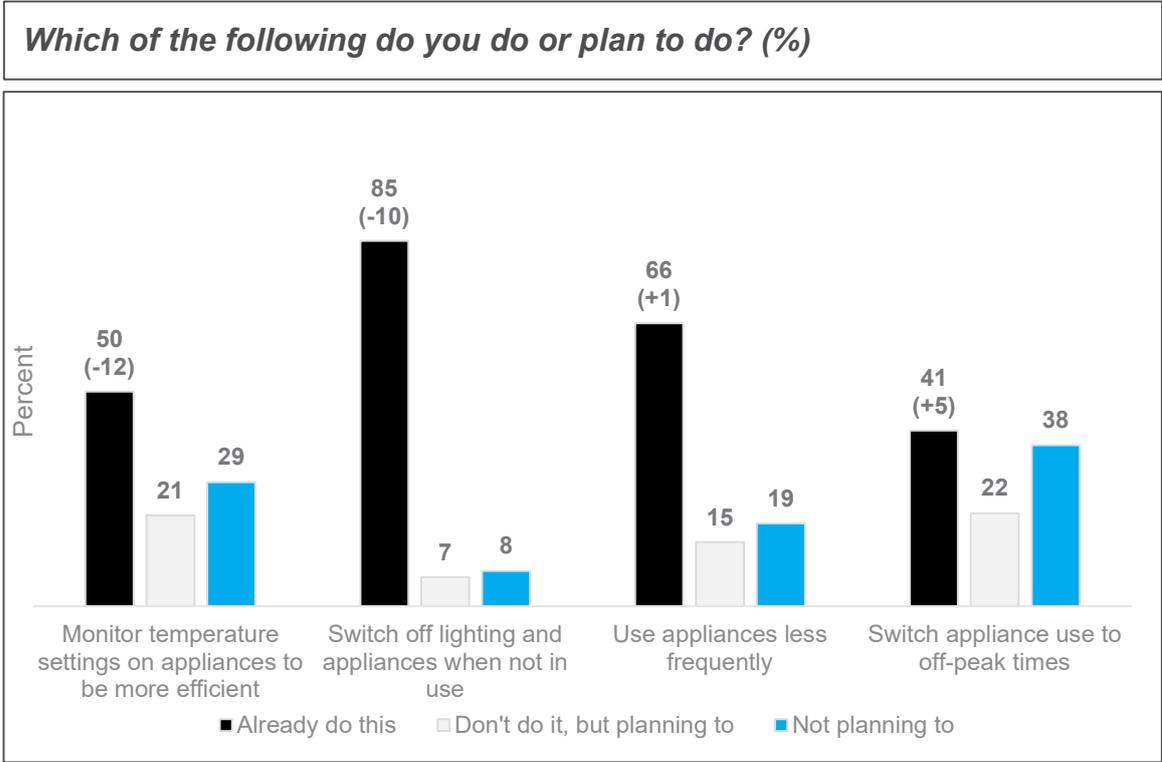
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in Tasmania.



Energy saving practices

An increasing number of Tasmanian households report switching their appliance use to off-peak times.

- 85% say they switch off lighting and appliances when not in use (down 10%).
- 66% say they use appliances less frequently.
- 50% say they monitor the temperature settings on appliances (down 12%).
- 41% say they already switch their use of appliances to off-peak times (up 5%).



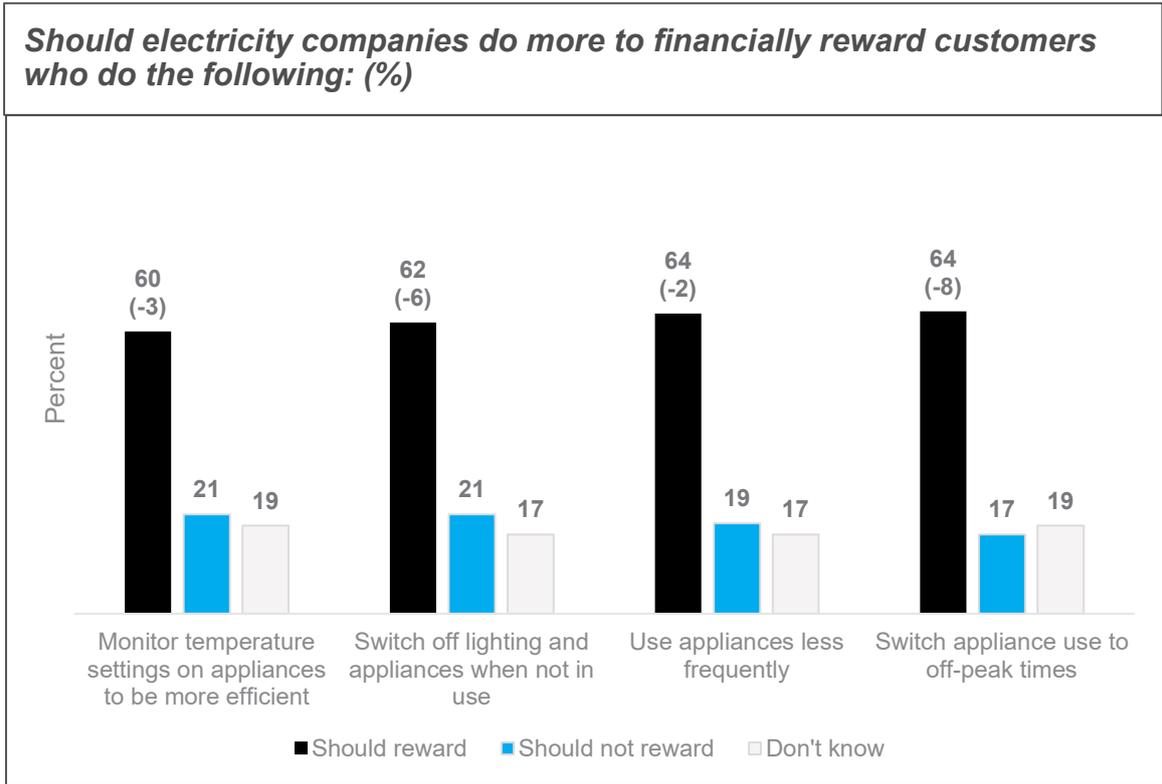
Base: Consumers in TAS (n=208)



Reward for reducing energy use

Tasmanians support the idea of customers being rewarded for taking action to reduce their energy usage, but this is down from June 2019.

- 64% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (down 8%).
- 64% think electricity companies should do more to financially reward customers who use appliances less frequently.
- 62% think electricity companies should do more to financially reward customers who switch off lighting and appliances when not in use (down 6%).
- 60% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (down 3%).



Base: Consumers in TAS (n=208)

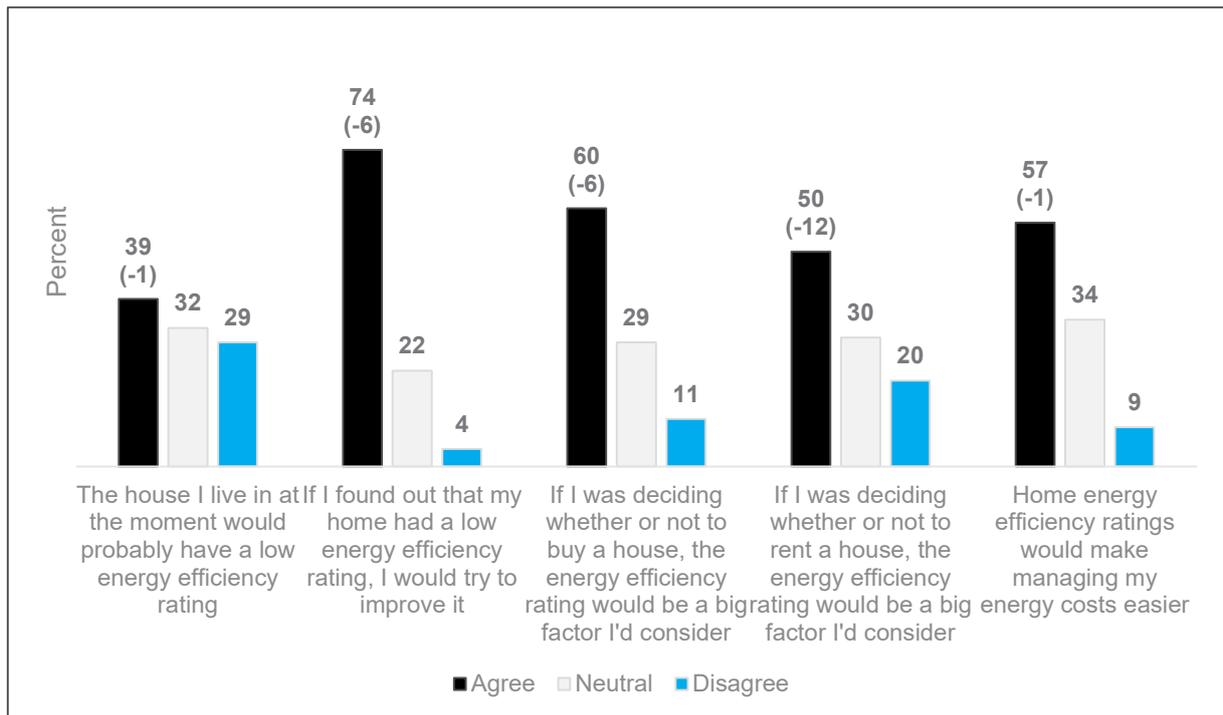


Housing energy efficiency

Tasmanian household consumers are most likely to agree that their current home would have a low energy rating.

- 39% of Tasmanians agree that the house they live in at the moment would probably have a low energy rating.
- 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 (down 6%).
- 60% say that an energy efficiency rating would be a big factor they would consider when buying a house (down 6%).
- 50% of renters say that an energy efficiency rating would be a big factor they would consider when renting a house (down 12%, 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=148)

Base for 'consider energy rating when renting': Renters in TAS (n=60)



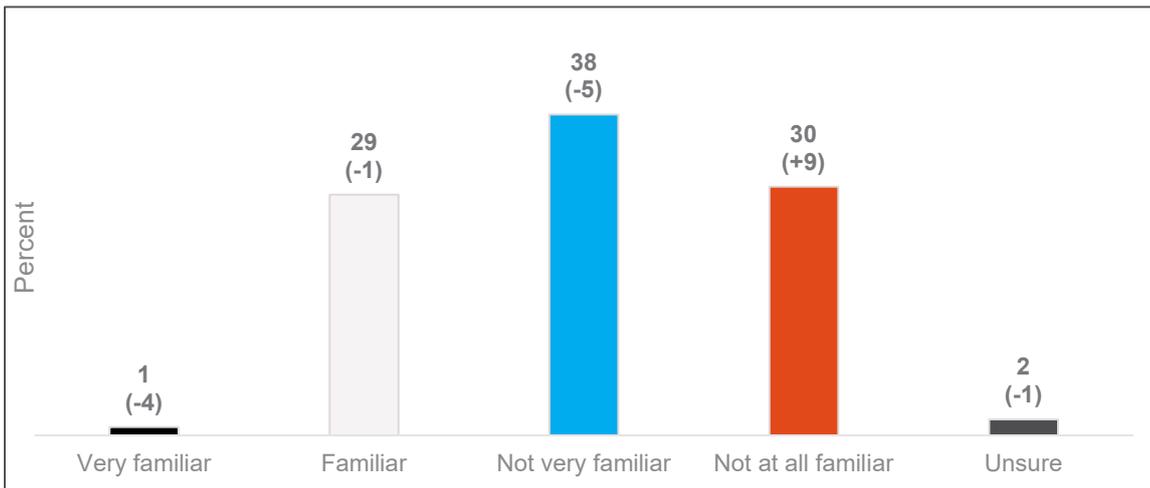
Other

Awareness of the Energy Ombudsman

30% of Tasmanian households say they are very familiar or familiar with the Energy Ombudsman.

- Familiarity with the Ombudsman amongst Tasmanian household consumers decreased 5%.

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



Base: Consumers in TAS (n=208)



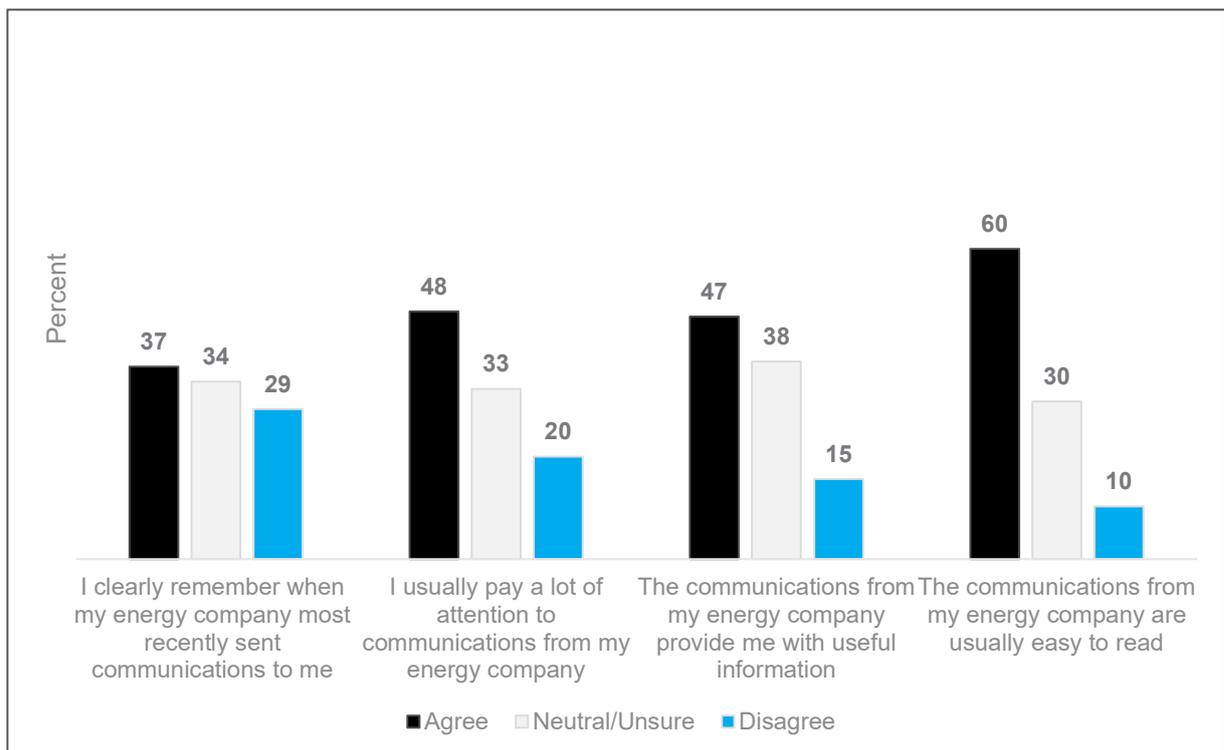
Other

Communications from energy providers

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

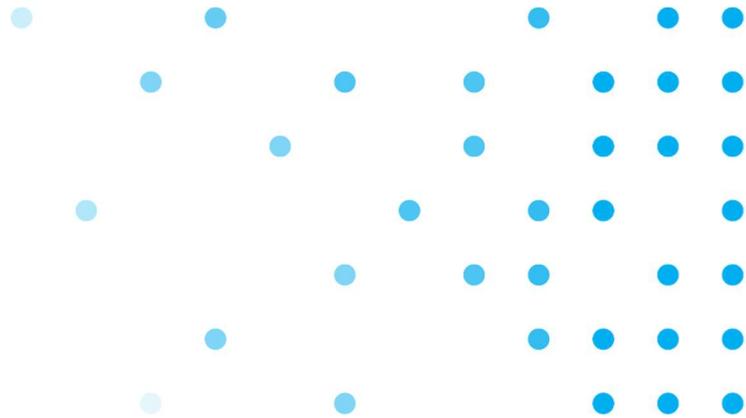
- Only 60% agree that communications from their energy company are easy to read.
- 48% agree they pay a lot of attention to communications from their energy company.
- Only 47% agree that the communications from their energy company provide useful information.
- 37% agree that they clearly remember when 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 TAS (n=208)

Australian Capital Territory





Overall satisfaction

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

- 79% say they are satisfied (up 10%).

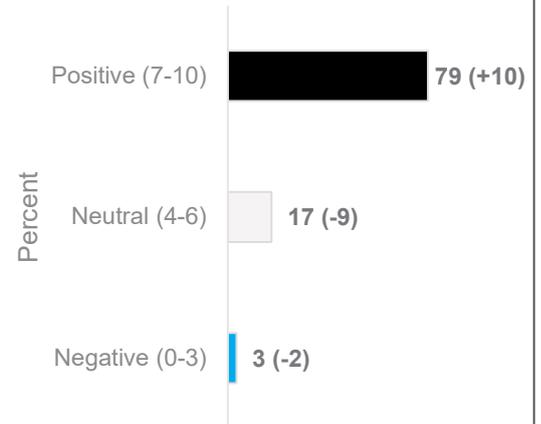
Satisfaction with the level of competition has increased significantly.

- 40% of ACT household consumers now say they are satisfied (up 12%).

Satisfaction

Overall Satisfaction

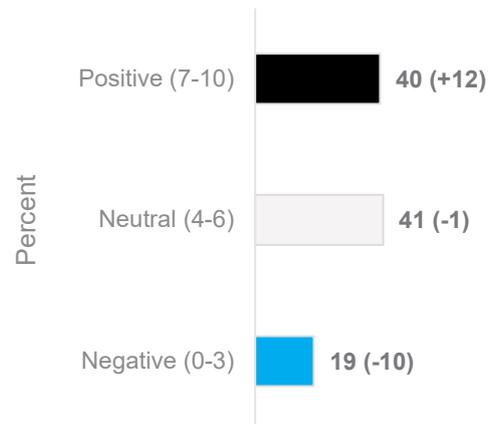
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in ACT (n=202)

Satisfaction with competition

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



Base: Consumers in ACT (n=202)

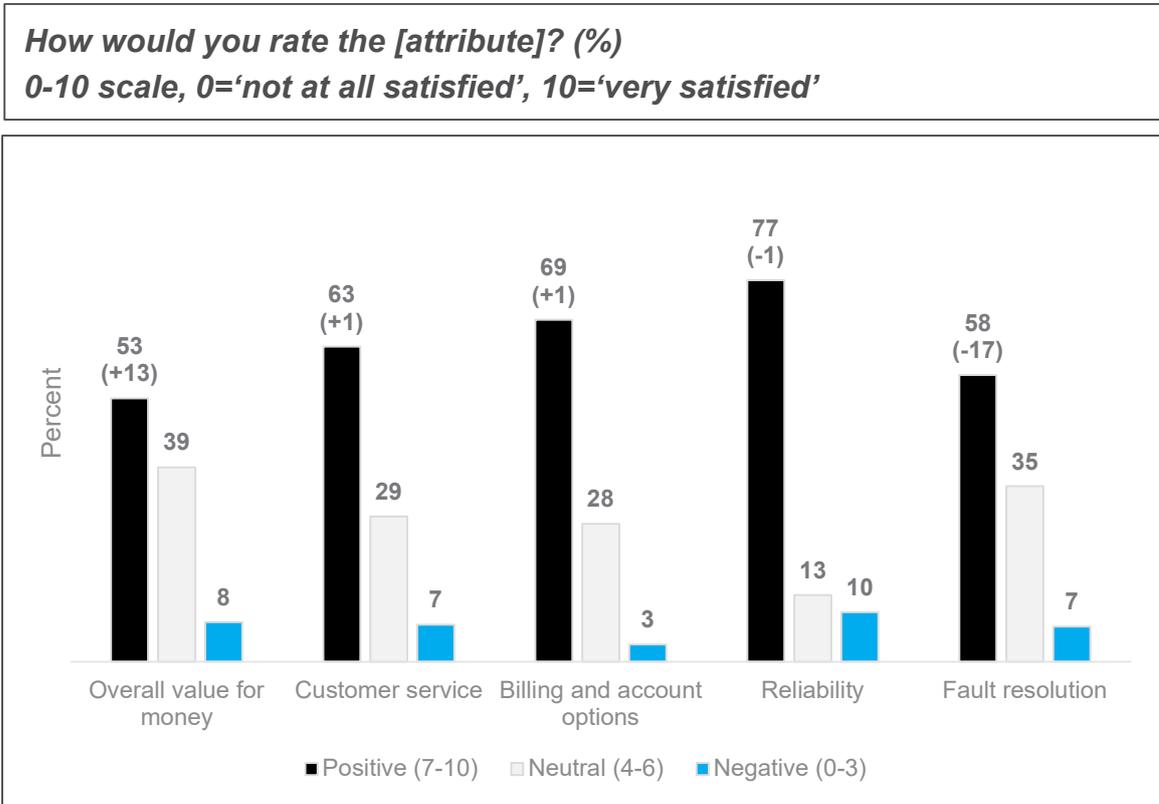


Satisfaction

Satisfaction with electricity

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

- 53% of ACT household consumers now report being satisfied with the value for money of their electricity service (up 13%).
- Among those who experienced a power outage, satisfaction with fault resolution is down 17% (to 58%).
- Satisfaction with reliability remains high at 77%.



Base: ACT electricity consumers (n=202)

Base for fault resolution: Those who had a power outage or rated 0 to 9 satisfaction with outage in ACT (n=85)



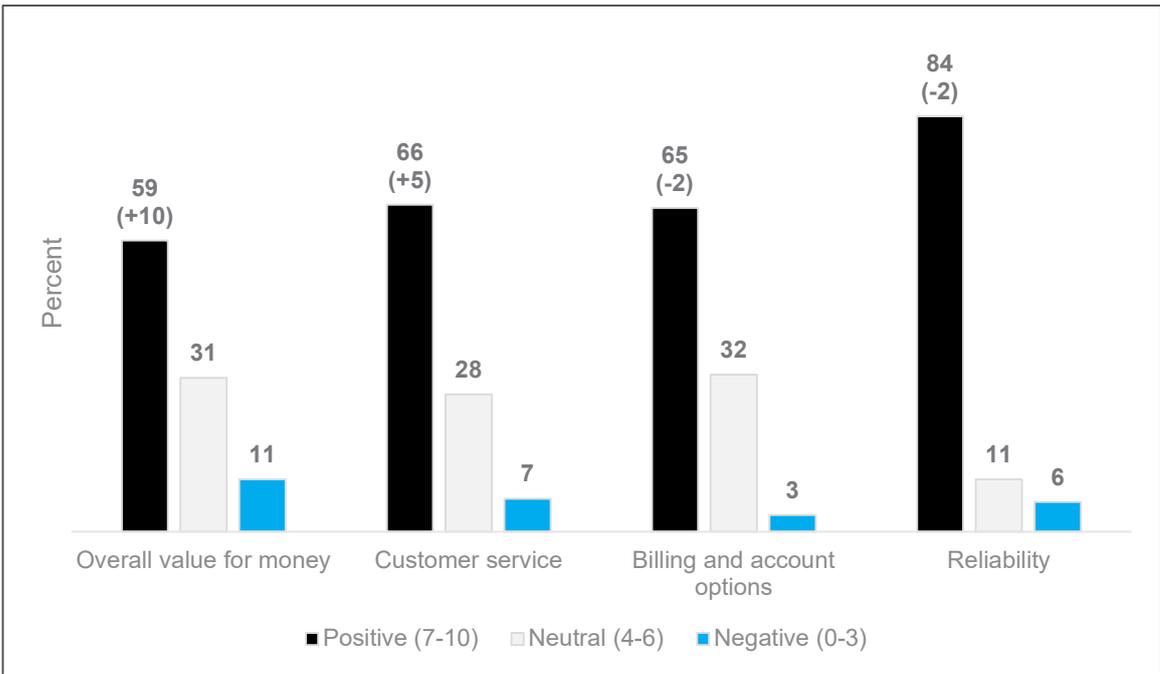
Satisfaction

Satisfaction with gas

Satisfaction with the value for money and customer service for gas services has increased.

- Satisfaction with overall value for money of gas services increased 10% (to 59%).
- Satisfaction with customer service increased 5% (to 66%)
- Satisfaction with the available billing and account options is steady at 65%.
- Satisfaction with gas reliability remains high at 84%.

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=152)



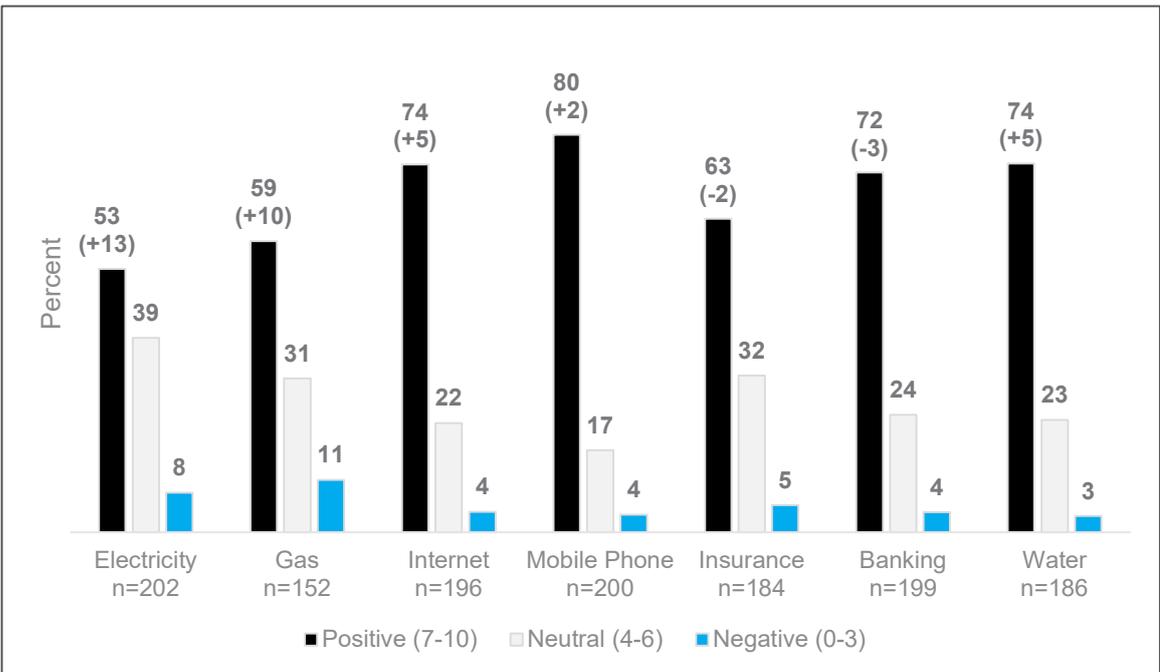
Satisfaction

Satisfaction with utilities and services

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

- Satisfaction with electricity (53% satisfied, up 13%) and gas (59% satisfied, up 10%) are behind all other utilities and services in the survey, but the gap has narrowed.
- The lowest satisfaction for a non-energy services was given to insurance (63%).

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



Base: Consumers in ACT with these services



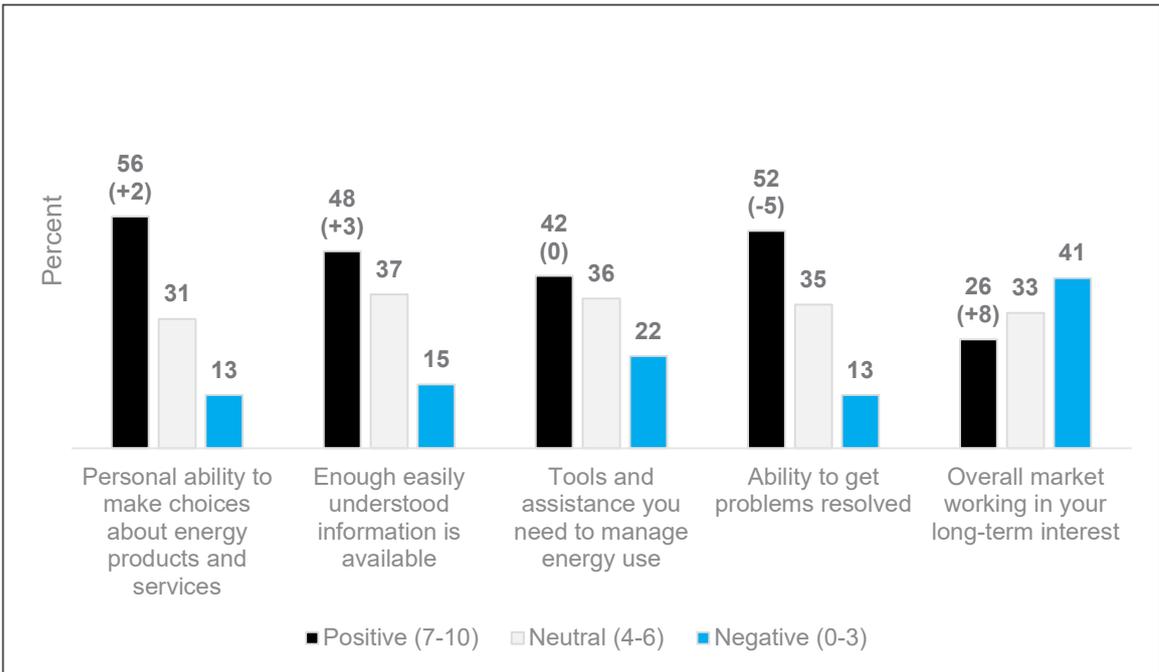
Confidence

Confidence in information, tools and a working market

Confidence in the energy market working in consumers’ long-term interests has increased 8% from last year (to 26%).

- 26% say they are confident the overall market is working in their long-term interests (up 8%).
- 52% say they are confident in their ability to get problems resolved (down 5%).
- 56% say they are confident in their own ability to make choices about energy products and services.
- 48% are confident in the availability of easily understood information.
- 42% 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=202)



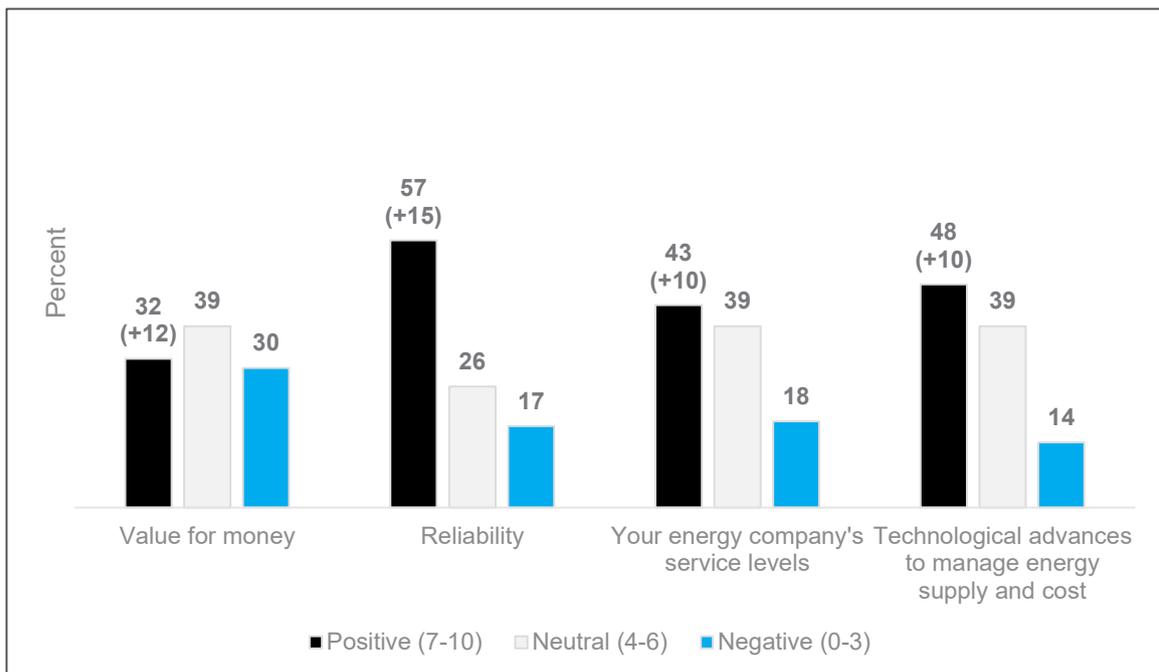
Confidence in long term outcomes

Confidence that market outcomes will improve in the future has increased.

- 32% say they are confident the market will provide better value for money in the future (up 12%).
- 57% are confident that the market will provide better reliability (up 15%).
- 43% are confident that service levels will improve in the next five years (up 10%).
- 48% are confident that the market will provide technological advances to manage their energy supply and costs (up 10%).

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'



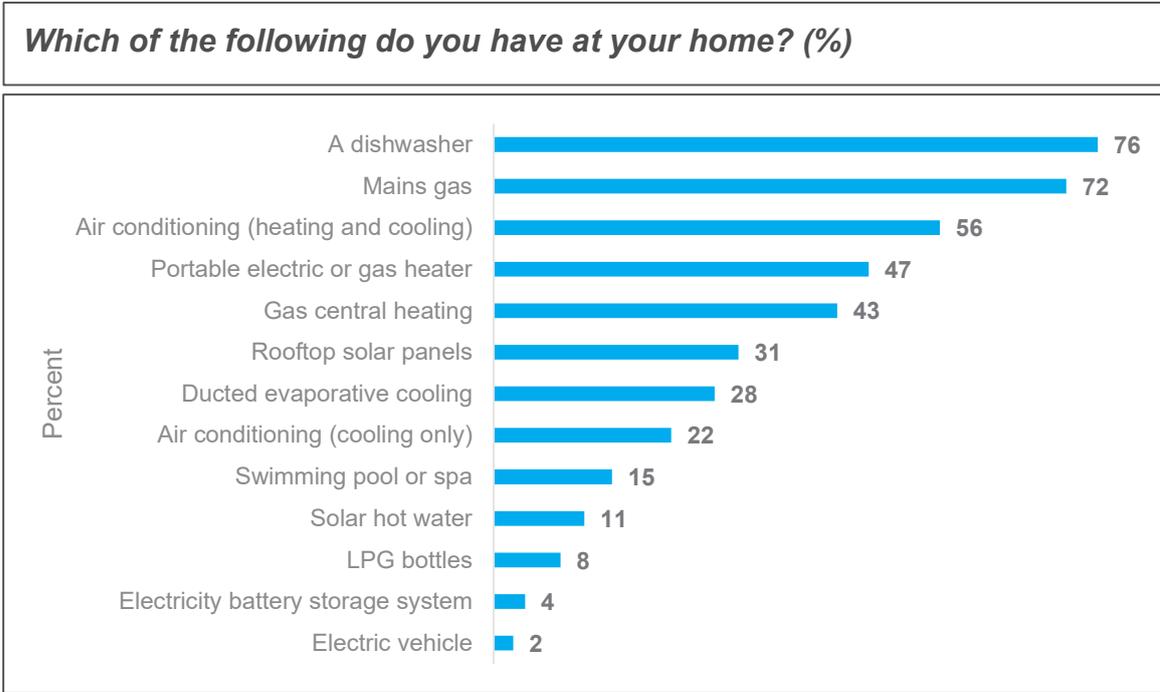
Base: Consumers in ACT (n=202)



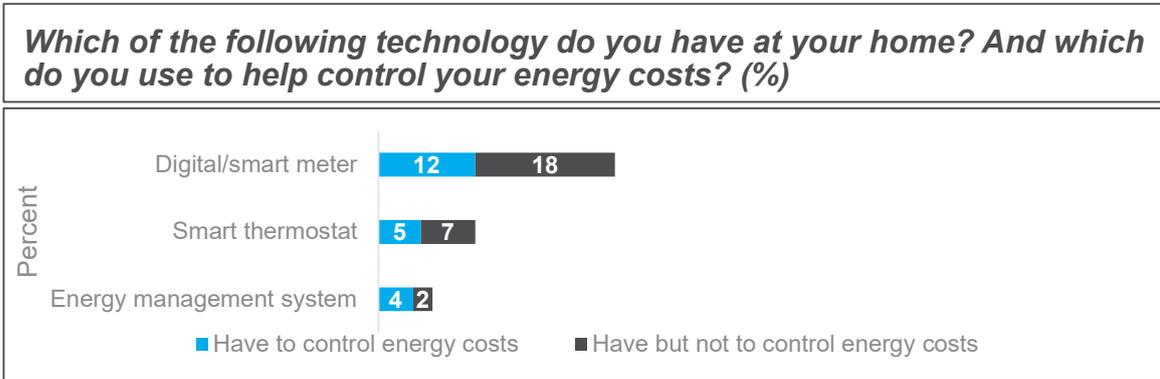
Uptake of technologies

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

- 30% say they have a smart/digital meter (up 10%) and 12% say they use it to manage their energy use and costs.
- 56% say they have air conditioning for heating and cooling.
- 47% say they have a portable electric or gas heater.
- 43% have gas central heating.
- 31% say they have rooftop solar panels.



Base: Consumers in ACT (n=202)



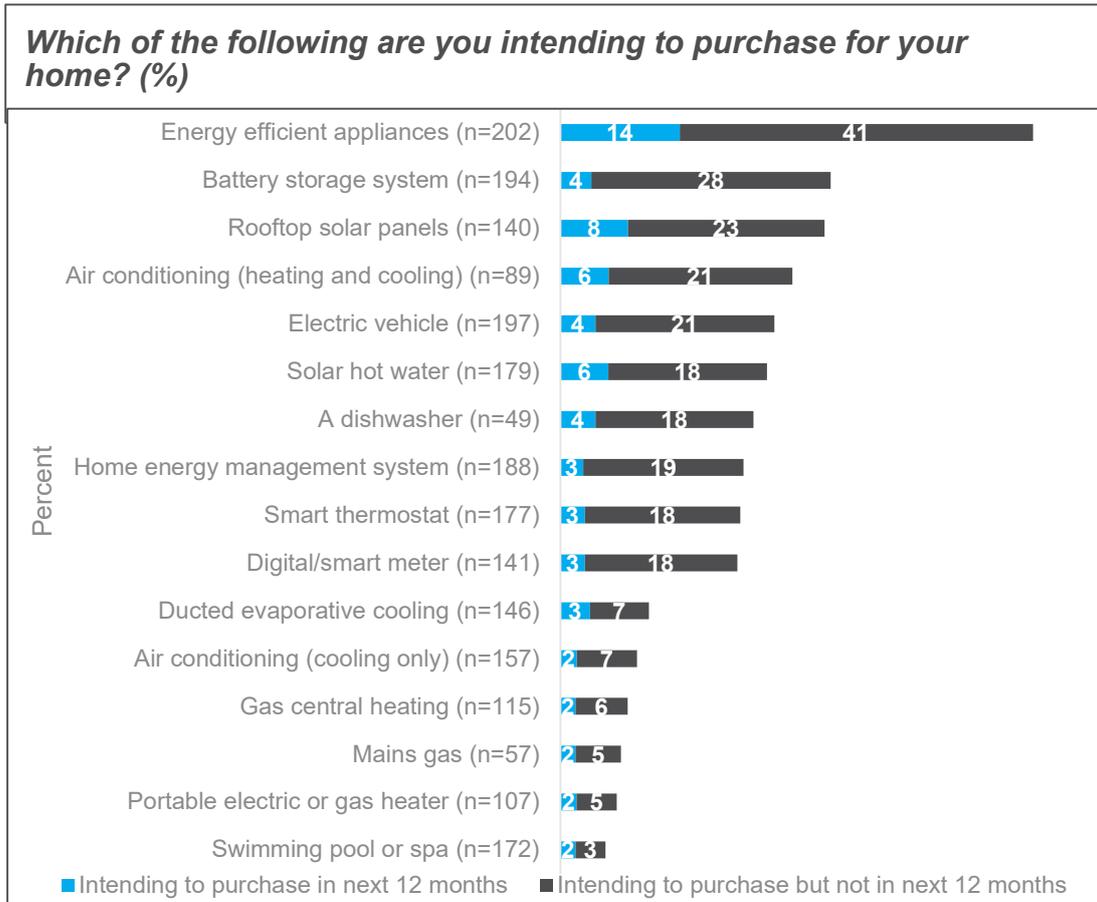
Base: Consumers in ACT (n=202)



Future uptake of technologies

Relatively high proportions of ACT household consumers are considering new energy technology, but fewer than last year.

- Proportions of ACT households intending to buy energy technology at some point is down 8% for efficient appliances, down 10% for battery storage, down 13% for rooftop solar, and down 6% for electric vehicles.
- However, intention to buy in the next 12 months increased for rooftop solar and electric vehicles.
- 31% say they are considering rooftop solar panels, with 8% intending to purchase in the next year.
- Of the households who reported having solar panels, 51% express interest in adding a battery storage system.
- 27% are considering air conditioning for both cooling and heating.



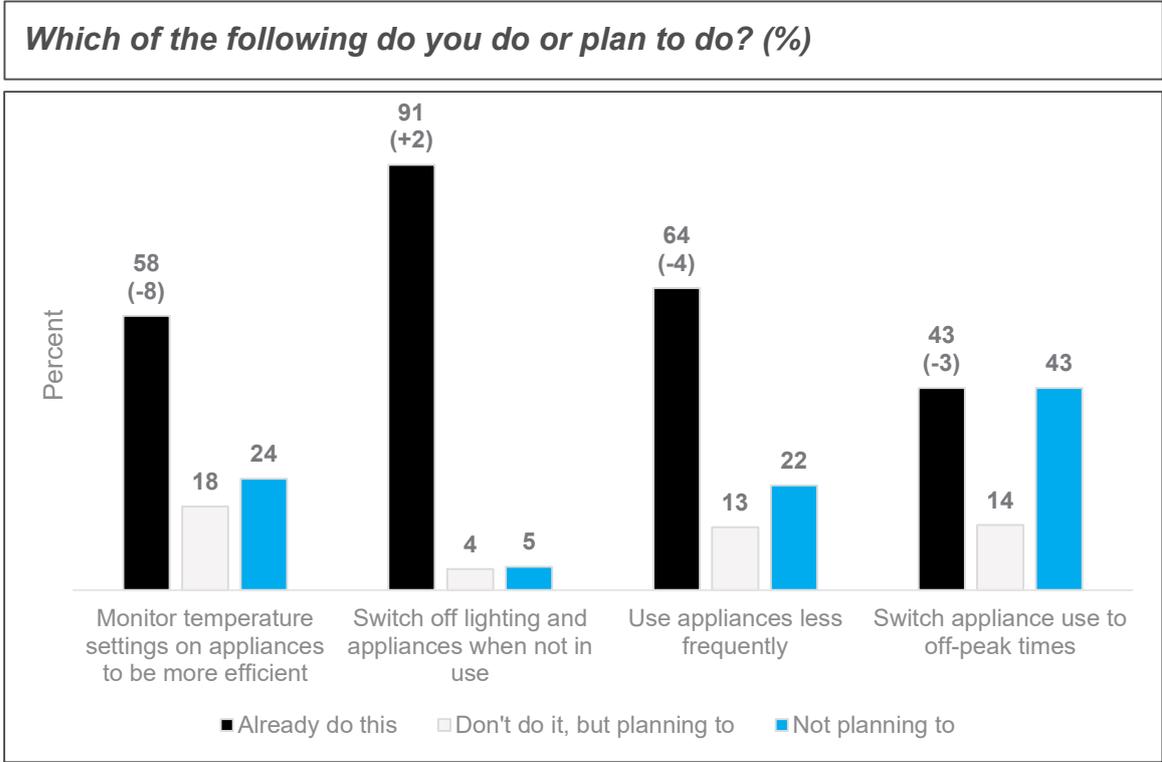
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in the ACT



Energy saving practices

Most ACT household consumers are actively trying to manage their energy use, although there has been a reduction since the results reported in June 2019.

- 91% say they switch off lighting and appliances when not in use.
- 64% say they use appliances less frequently.
- 58% say they monitor temperature settings on appliances (down 8%).
- 43% say they already have switched appliance use to off-peak times.



Base: Consumers in ACT (n=202)

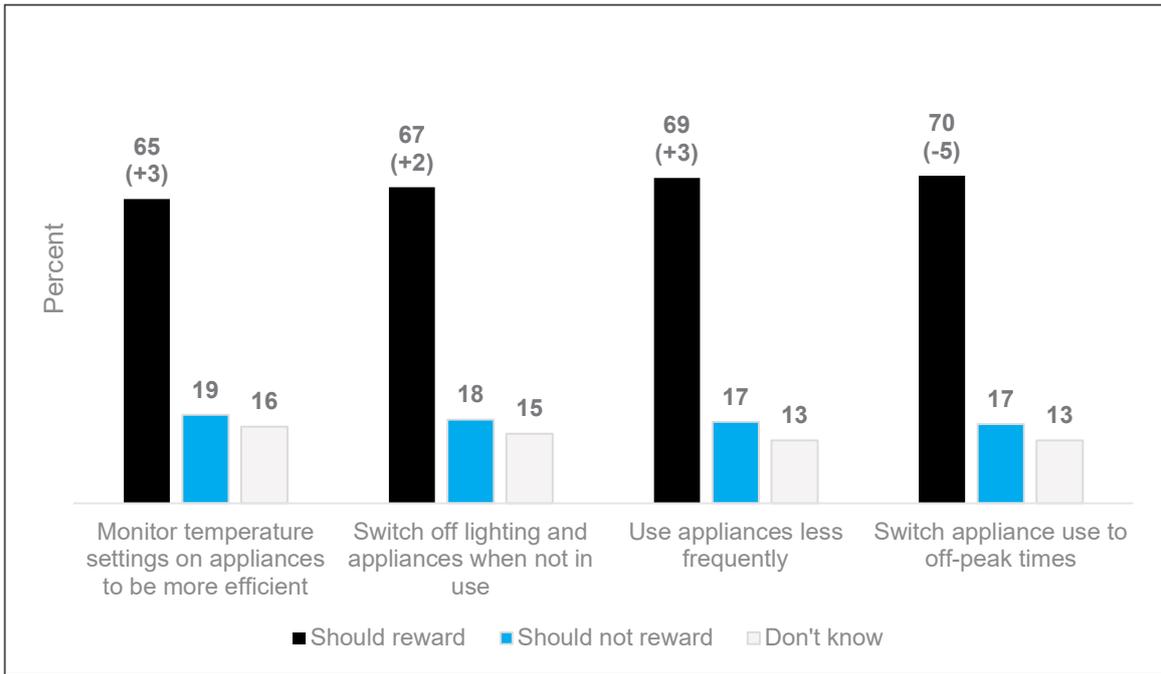


Reward for reducing energy use

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

- 70% think electricity companies should do more to financially reward customers who switch appliance use to off-peak times (down 5%).
- 69% 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 switch off lighting and appliances when not in use.
- 65% 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: (%)



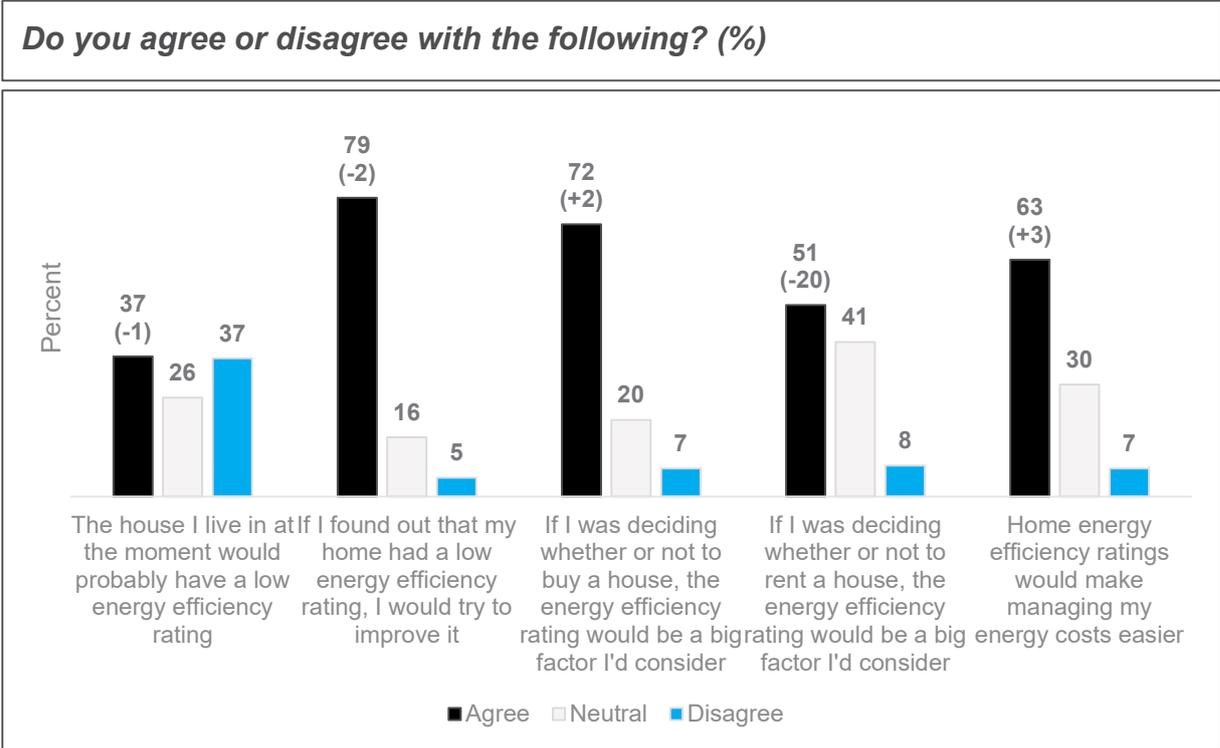
Base: Consumers in ACT (n=202)



Housing energy efficiency

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

- 72% say energy efficiency would be a big factor when deciding to purchase a house and 79% of home-owners say they would try to improve their home’s energy rating if they found out it had a low rating, the highest in any state or territory.
- 63% say a home energy efficiency rating would make managing their energy costs easier.
- 51% of renters say an energy rating would be a big factor they would consider when renting a house.
- 37% of ACT household consumers say their house would have a low energy efficiency.



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=202)

Base for 'I would try to improve my home energy efficiency': Home-owners in ACT (n=140)

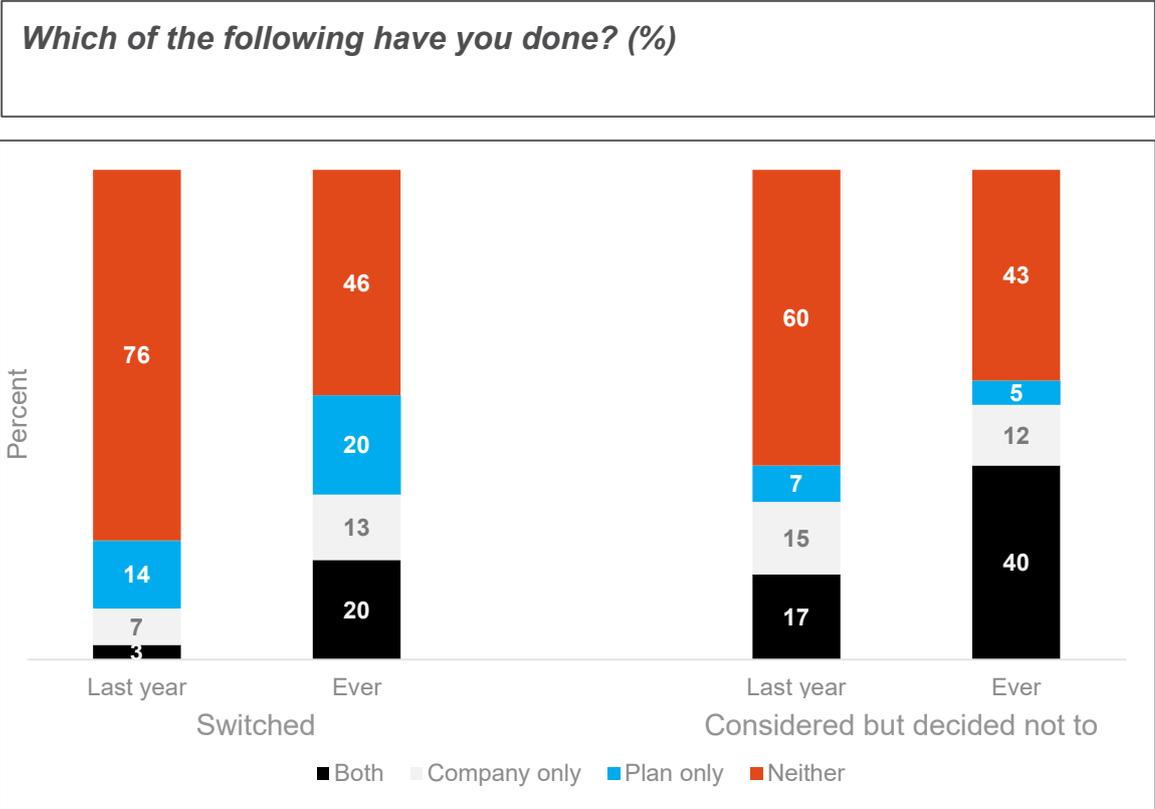
Base for 'consider energy rating when renting': Renters in ACT (n=61)



Switching behaviour

One in four ACT household consumers say they switched energy company and/or plan in the past twelve months.

- 24% 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.
- 46% say that they have never switched energy companies or plans.



Base: Consumers in ACT (n=202)



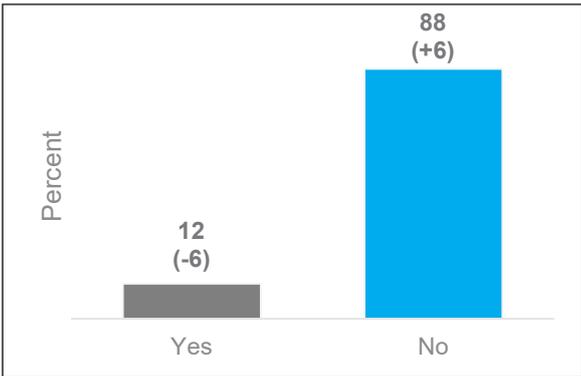
Activity

Reasons for considering switching

Value for money concerns are the main reason for switching.

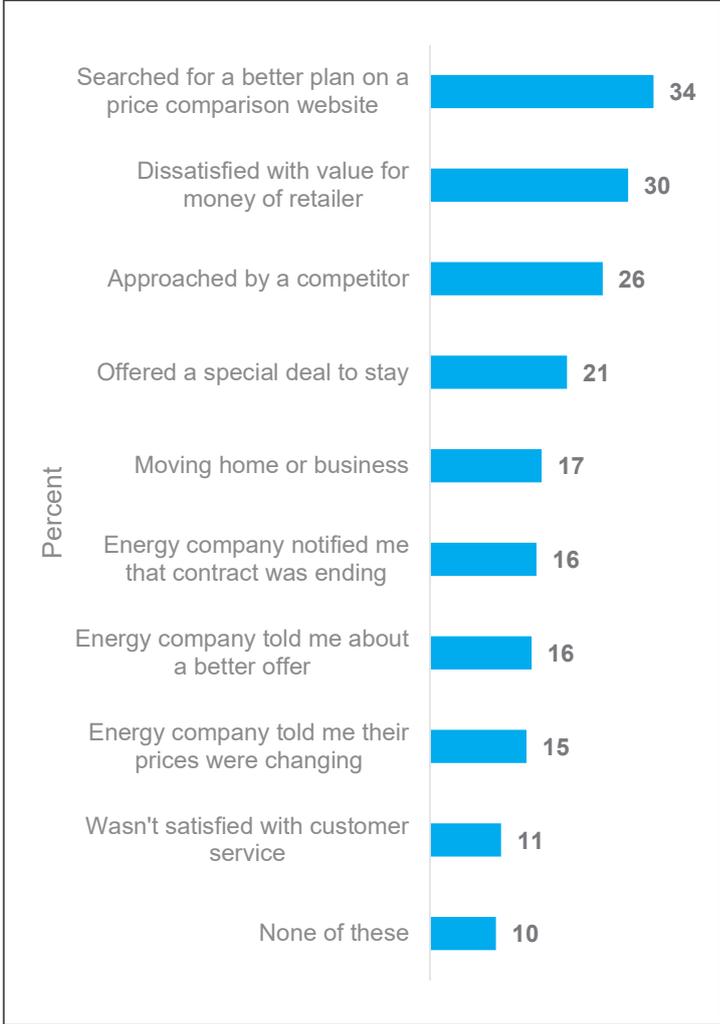
- 34% searched for a better plan on a price comparison website when they looked at switching.
- 30% say they were dissatisfied with the value for money provided by their retailer.
- 12% of ACT household consumers intend to switch companies or plans in the next year (down 6%).

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



Base: Consumers in ACT (n=202)

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=129)

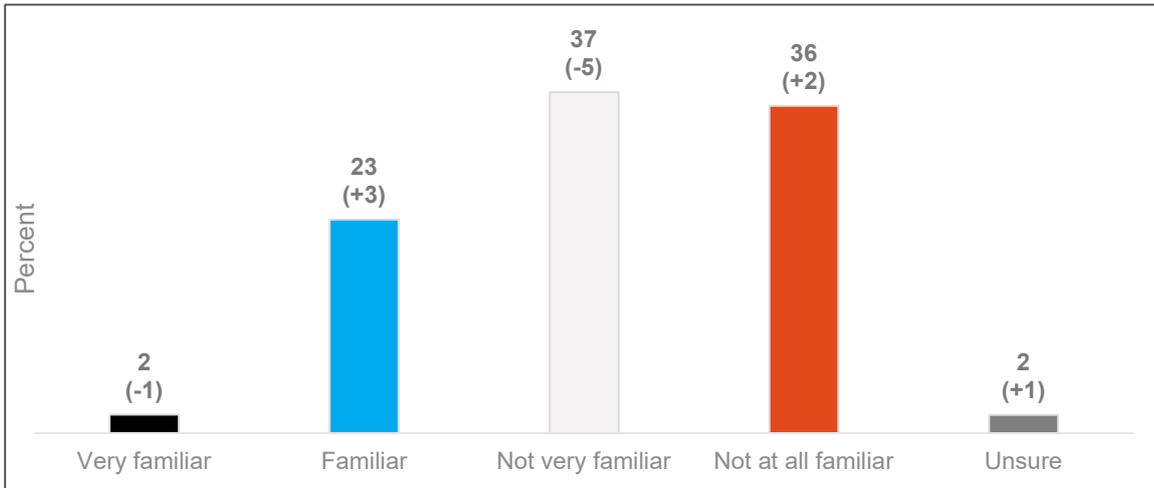


Other

Awareness of the Energy Ombudsman

A quarter of consumers from the ACT say they are familiar with the Energy Ombudsman.

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



Base: Consumers in ACT (n=202)



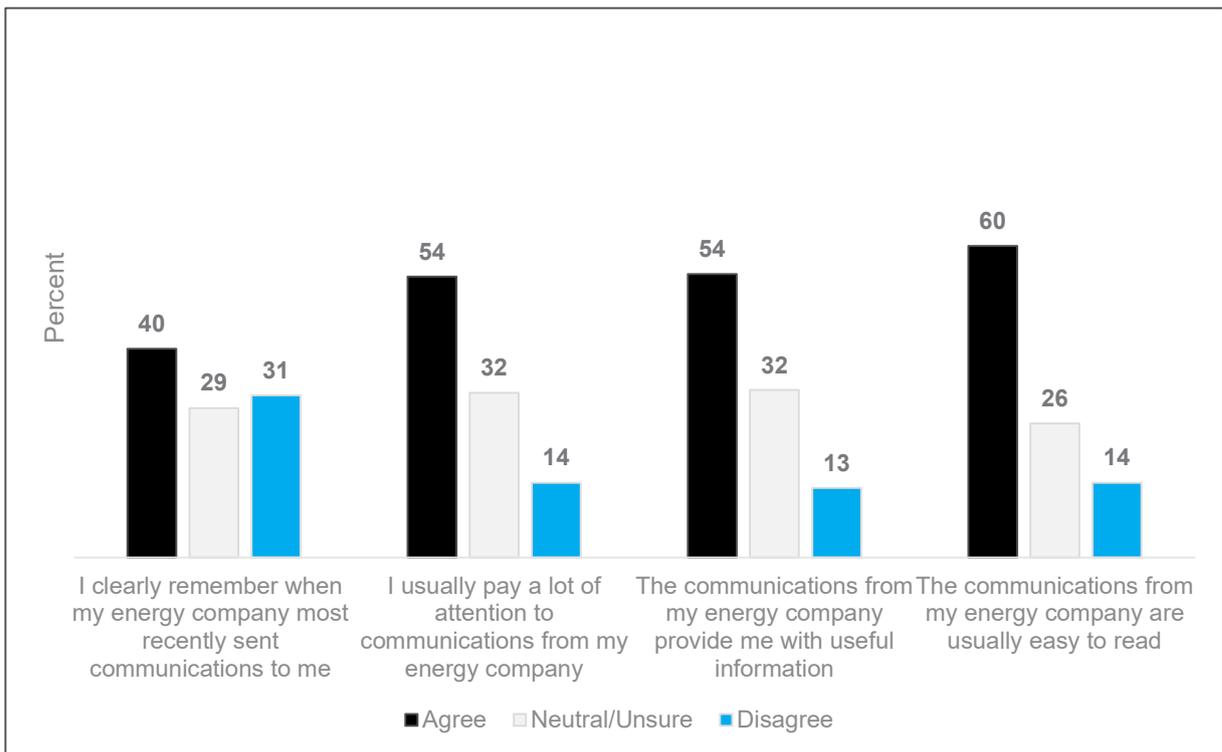
Other

Communications from energy providers

Two-fifths of ACT consumers agree that they recall their energy company’s most recent communication.

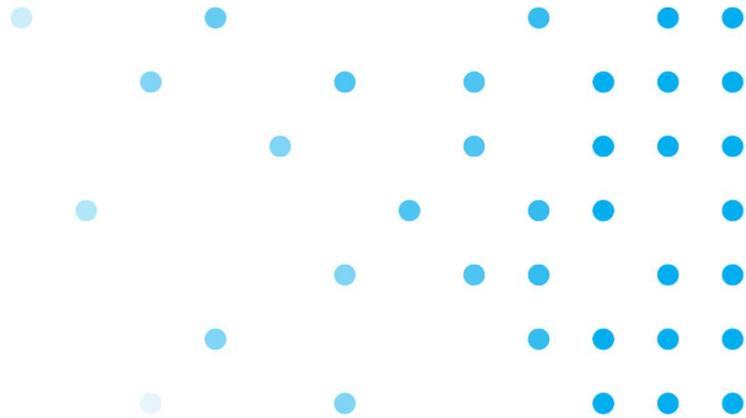
- 40% agree that they clearly remember when they most recently received communication from their energy company.
- Only 60% agree that communications from their energy company are easy to read.
- 54% agree they pay a lot of attention to communications from their energy company
- Only 54% agree that their 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=202)

Western Australia





Overall satisfaction

Overall satisfaction with electricity and gas services in Western Australia is unchanged.

- 78% are satisfied with their electricity and gas services.

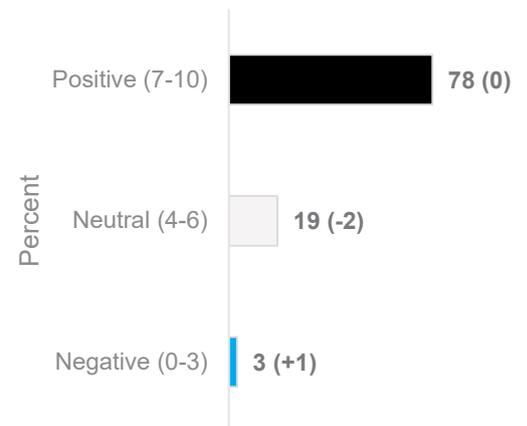
The proportion of household consumers in Western Australia that are satisfied with the level of competition in the market has increased.

- 47% say they are satisfied with competition levels (up 9%).

Satisfaction

Overall Satisfaction

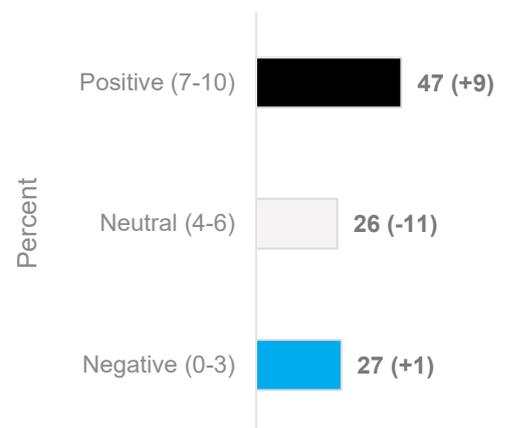
How satisfied are you with the provision of your electricity and gas services overall in the last 6 months? (%)



Base: Consumers in WA (n=311)

Satisfaction with competition

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



Base: Consumers in WA (n=311)



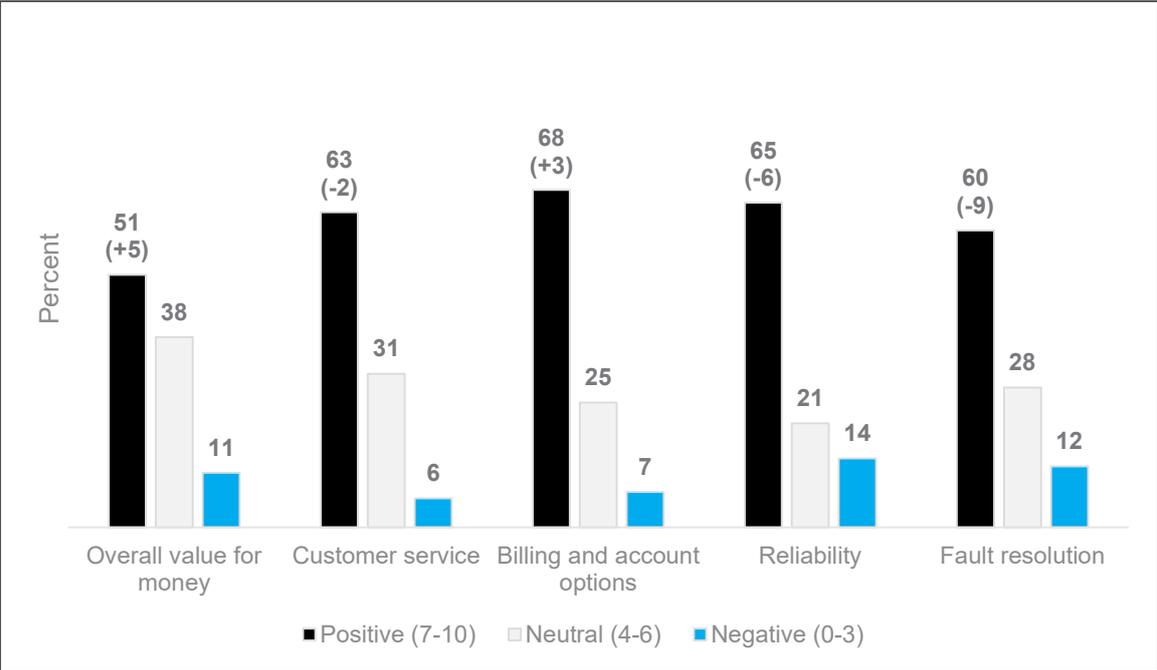
Satisfaction

Satisfaction with electricity

Satisfaction with electricity reliability and fault resolution have decreased in Western Australia.

- Of those who experienced a power outage, 60% say they are satisfied with the fault resolution provided to them (down 9%).
- 65% say they are satisfied with the reliability of their electricity supply (down 6%).
- 68% say they are satisfied with their billing and account options.
- 63% say they are satisfied with the customer service they receive.
- Satisfaction with value for money outcomes for electricity services increased by 5% (to 51%), but this measure still lags other satisfaction measures.

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=311)
Base for fault resolution: Those in WA who rated 0 to 9 satisfaction and had a power outage (n=196)



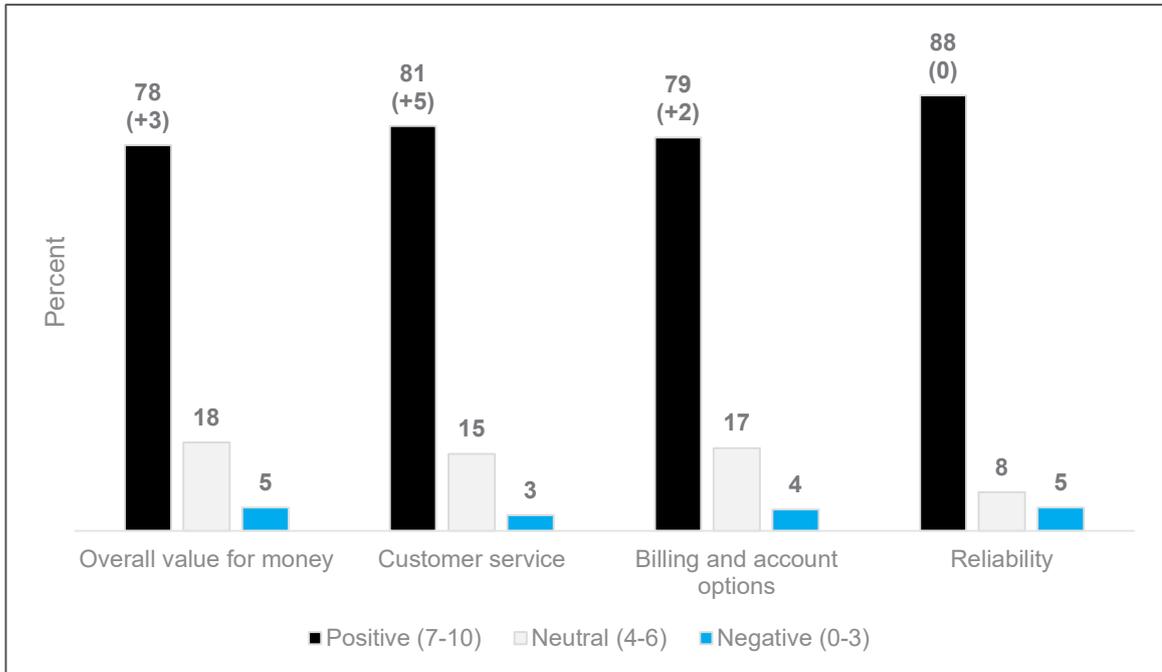
Satisfaction

Satisfaction with gas

Western Australian household gas consumers are particularly satisfied.

- Satisfaction with customer service has increased by 5% (to 81%).
- Satisfaction with reliability of gas services is unchanged at 88%.
- Satisfaction with billing and account options is at 79%.
- Satisfaction with overall value for money for gas is 78%.

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=259)

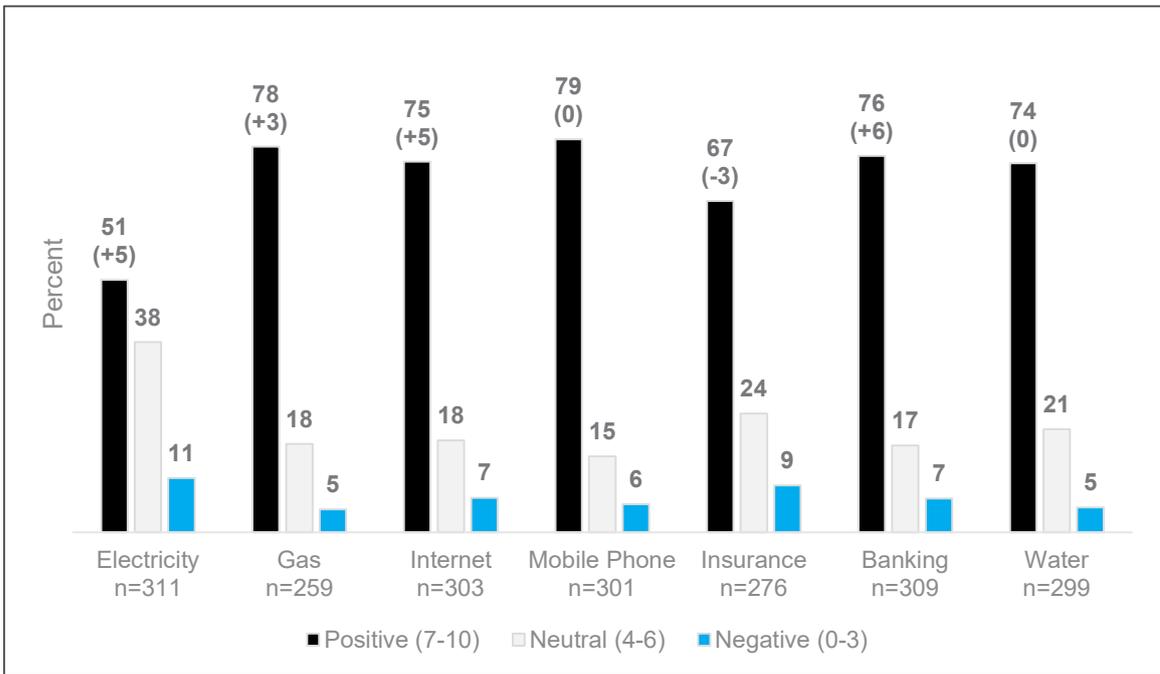


Satisfaction with utilities and services

Satisfaction with gas is high relative to other utilities and services in terms of value for money, but electricity continues to trail.

- At 78%, satisfaction with gas value for money is the second highest of all utilities and services.
- Satisfaction with electricity (51%) is behind all other utilities and services with insurance the next lowest rated at 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 WA (n=311)

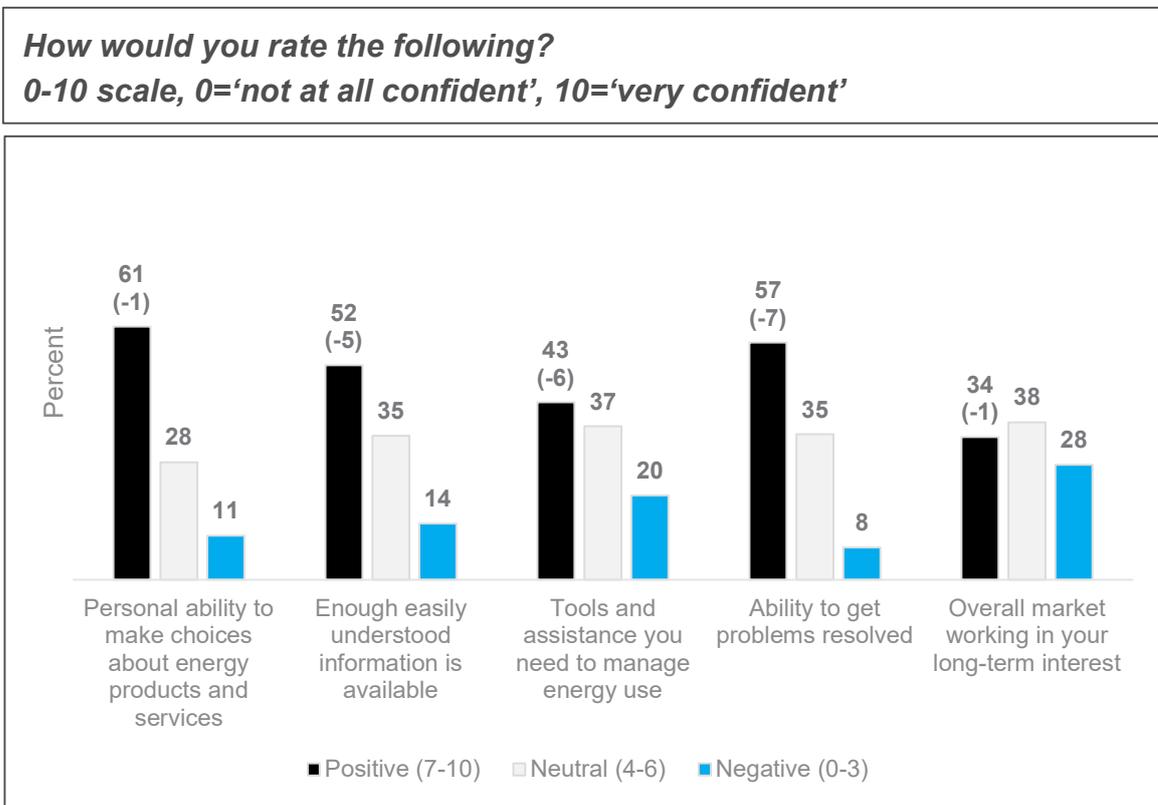


Confidence

Confidence in information, tools, and a working market

Consumers' confidence in information, tools and a working market has decreased.

- 57% are confident in their ability to get problems resolved (down 7%).
- 52% say there is enough easily understood information available (down 5%)
- 43% say there are enough tools to manage their energy usage (down 6%).
- 61% are confident in their own ability to make choices about energy products.
- Consumers' confidence that the market is working in their long-term interest remains low at 34%.



Base: Consumers in WA (n=311)

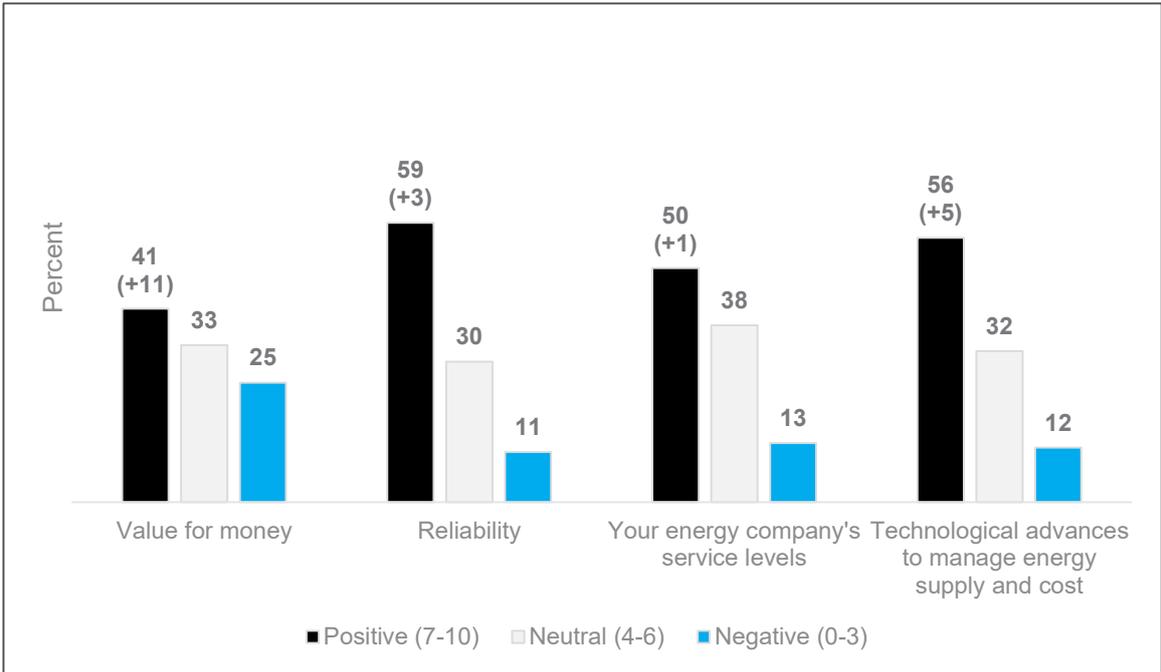


Confidence in long term outcomes

Confidence in the market providing value for money in the future has increased.

- Consumers' confidence that the market will deliver better overall value for money in the future increased by 11% (to 41%).
- 59% say they were confident the market would provide greater reliability in the future.
- 56% say they are confident that technological advances will improve energy management in terms of cost and supply (up 5%).
- 50% are confident that the market will provide better service levels 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'



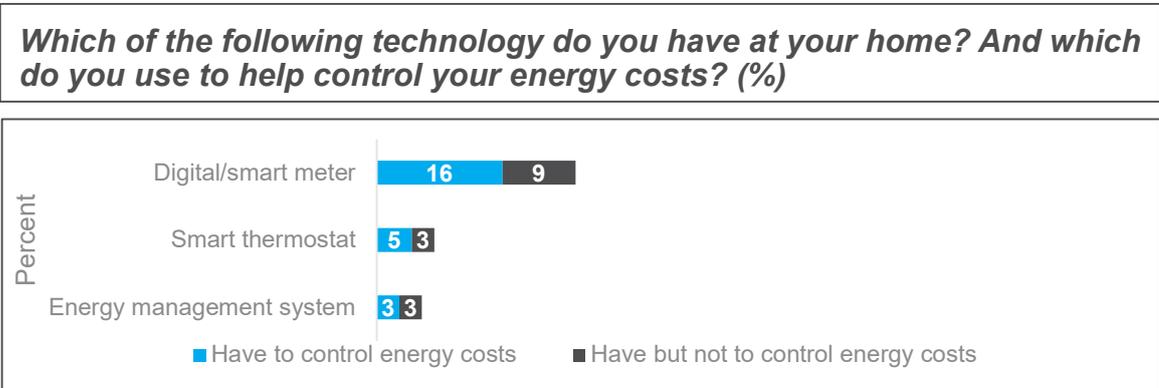
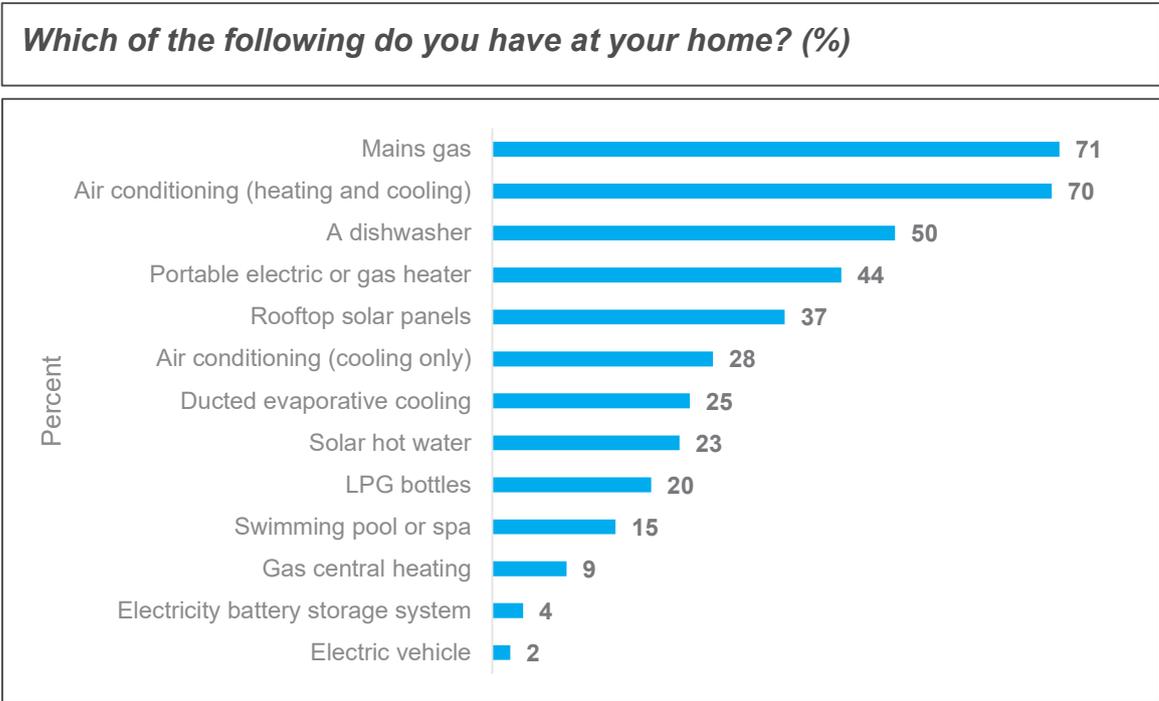
Base: Consumers in WA (n=311)



Uptake of technologies

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

- More than half of WA households with a smart/digital meter report using it to manage their energy use and costs.
- 44% say they have a portable electric or gas heater, 37% say they have rooftop solar panels and 23% say they have solar hot water.



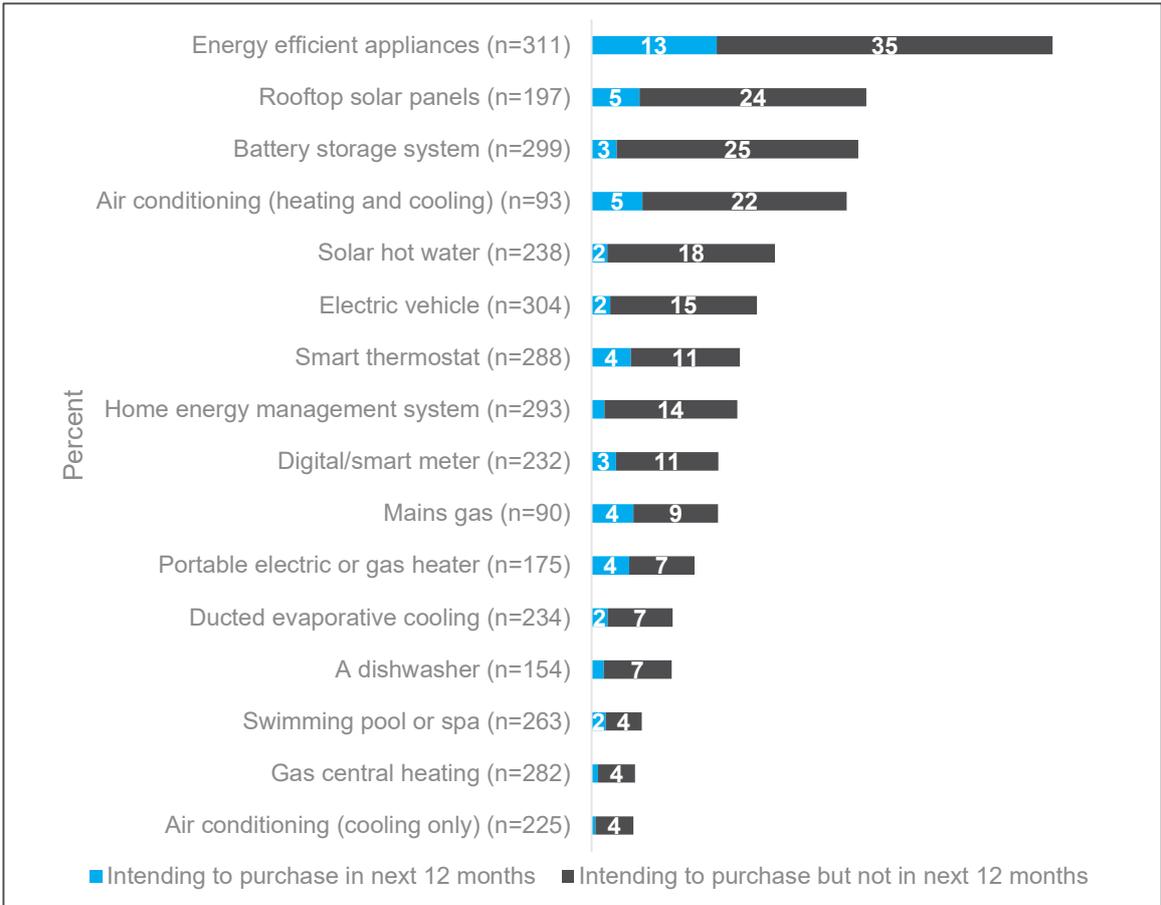


Future uptake of technologies

More than a quarter of Western Australian consumers are considering purchasing rooftop solar or an electric battery storage system, but intention to buy new energy technology has gone down.

- Proportions of households intending to buy energy technology at some point is down 11% for efficient appliances, 9% for battery storage, and 6% for rooftop solar.
- 29% say they are considering rooftop solar panels, including 5% in the next year.
- 28% say they are considering a battery storage system, 3% in the next year.
- Of the households who report having solar panels, 44% express interest in adding a battery storage system.
- 27% report that they are considering air conditioning for both cooling and heating.

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



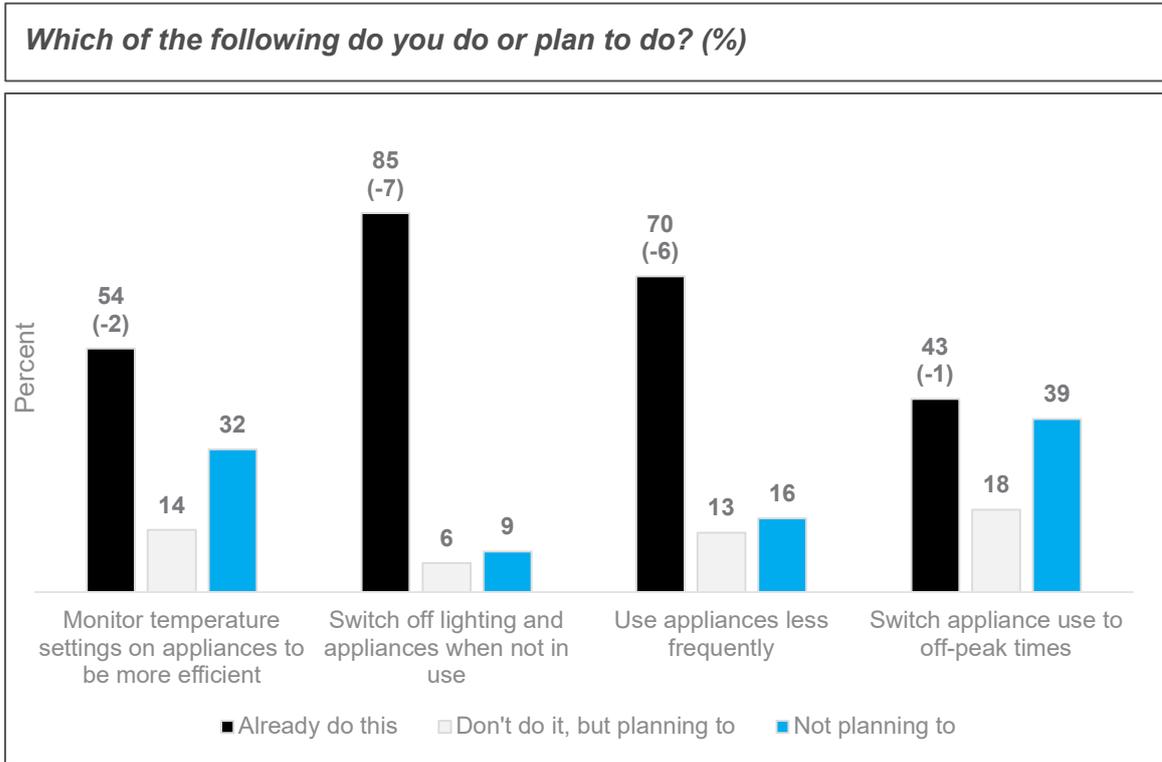
Note: Other than 'energy efficient appliances' which was asked of the entire sample, figures are the percentage of those who do not already have that technology in their home in WA



Energy saving practices

The proportion of Western Australian household consumers saying that they engage in energy saving practices is down from last year.

- 85% of Western Australian household consumers say they switch off lighting and appliances when not in use (down 7%).
- 70% say they use appliances less frequently (down 6%).
- 54% report that they monitor temperature settings on appliances to be more efficient.
- 43% say they already switch appliance use to off-peak times.



Base: Consumers in WA (n=311)

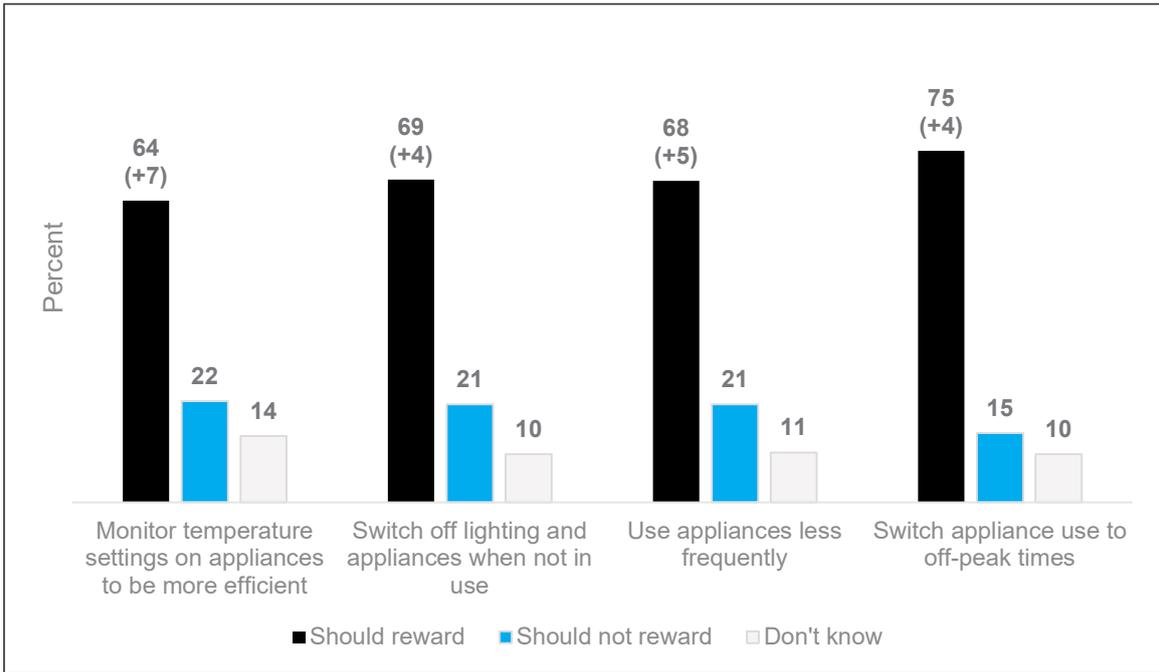


Reward for reducing energy use

Most Western Australian household consumers think customers 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.
- 69% 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 (up 5%).
- 64% think electricity companies should do more to financially reward customers who monitor temperature setting on appliances to be more efficient (up 7%).

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



Base: Consumers in WA (n=311)

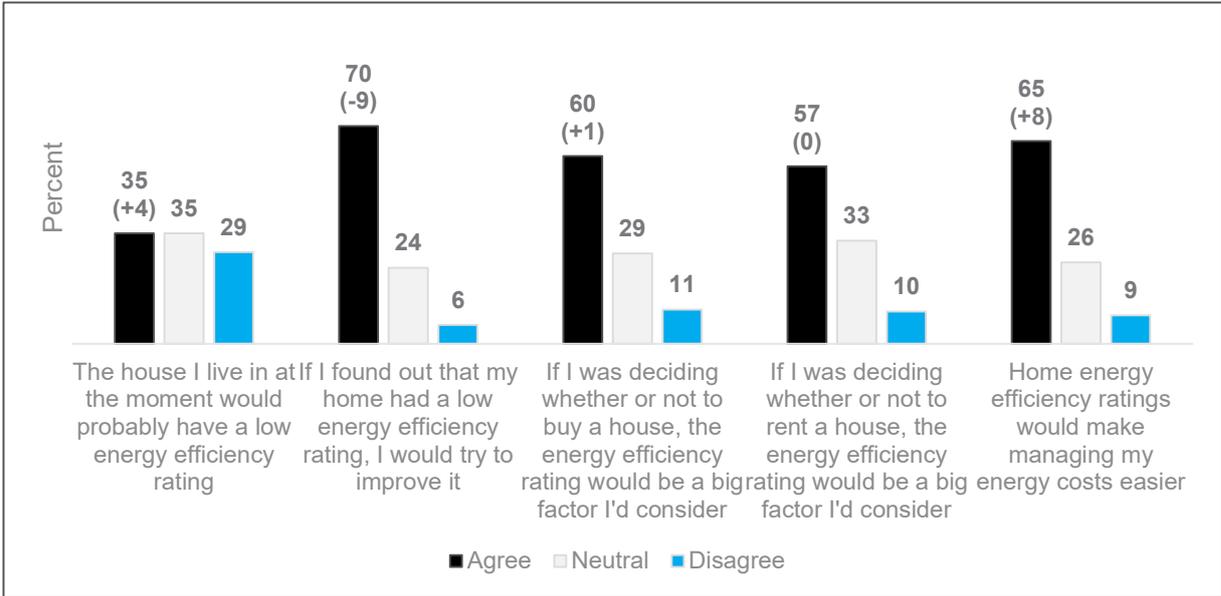


Housing energy efficiency

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

- 70% of home-owners agree that they would try to improve their home’s energy efficiency rating if they found out it had a low rating (down 9%).
- 65% say a home energy efficiency rating would make managing their energy costs easier (up 8%)
- 60% say an energy efficiency rating would be a big factor they would consider when buying a house.
- 57% of renters say that the energy efficiency rating would be a big factor they would consider when renting a house.
- 35% agree that the home they live in at the moment would probably have a low energy efficiency rating, while 29% disagree.

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=311)

Base for 'I would try to improve my home energy efficiency': Home-owners in WA (n=218)

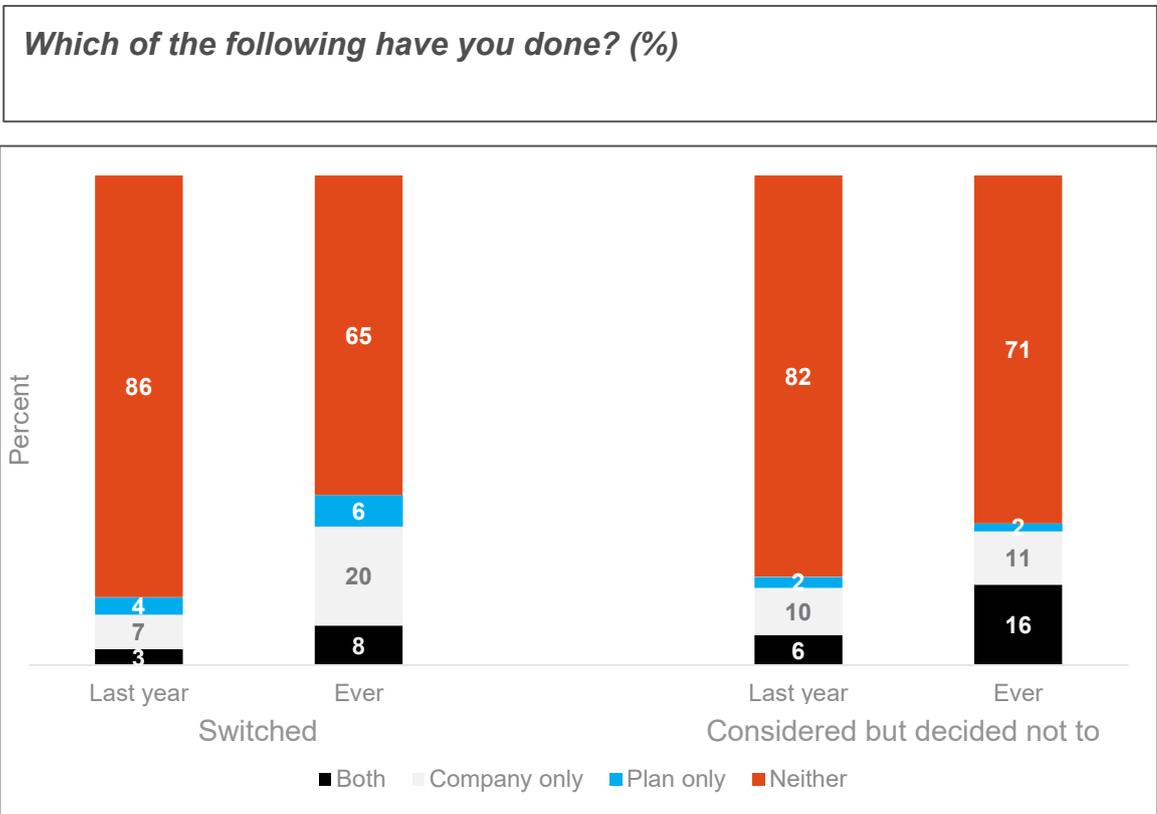
Base for 'consider energy rating when renting': Renters in WA (n=88)



Switching behaviour

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

- 14% say they have switched energy companies and/or plans in the past year.
- 65% say they have never switched energy companies or plans.
- 18% say they considered switching energy companies or plans in the past year but decided not to.



Base: Consumers in WA (n=311)



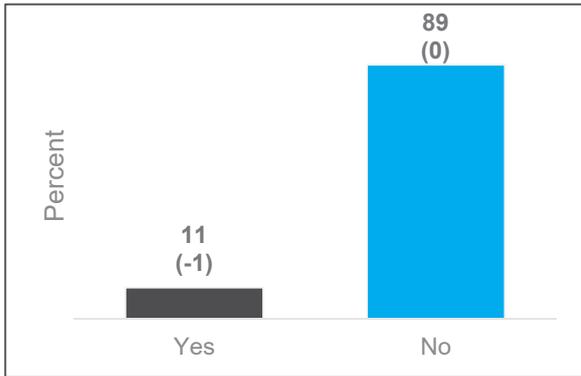
Activity

Reasons for considering switching

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

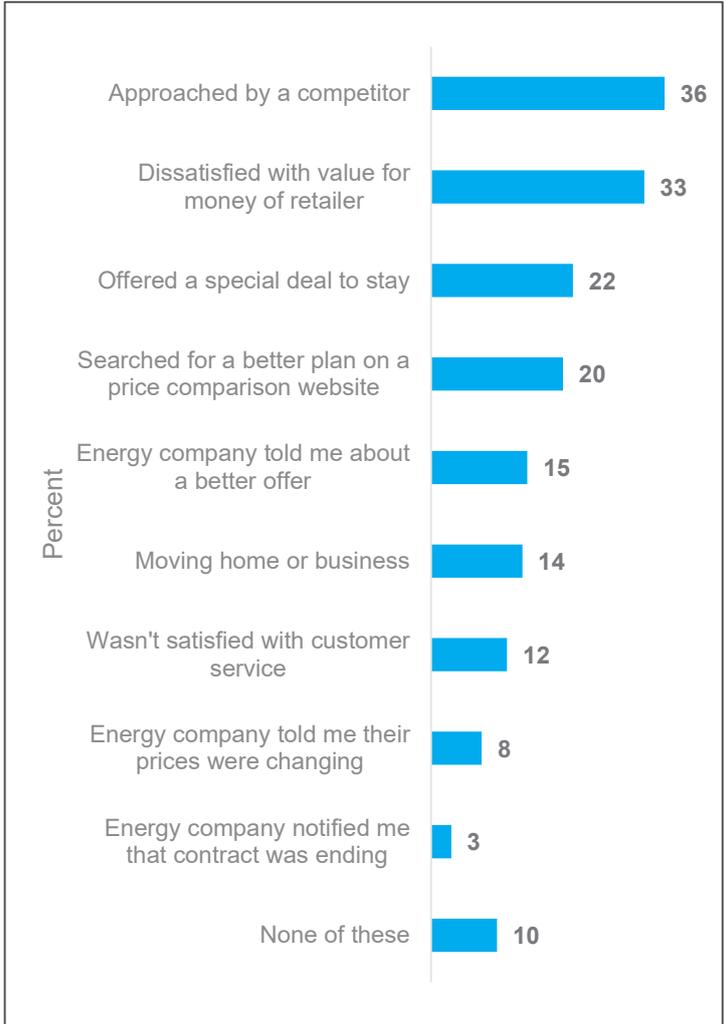
- 36% of those who have looked at switching say they were approached by a competitor.
- 33% say they were dissatisfied with the value for money of their retailer.
- 11% plan to switch energy companies or plans in the next 12 months.

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



Base: Consumers in WA (n=311)

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=129)

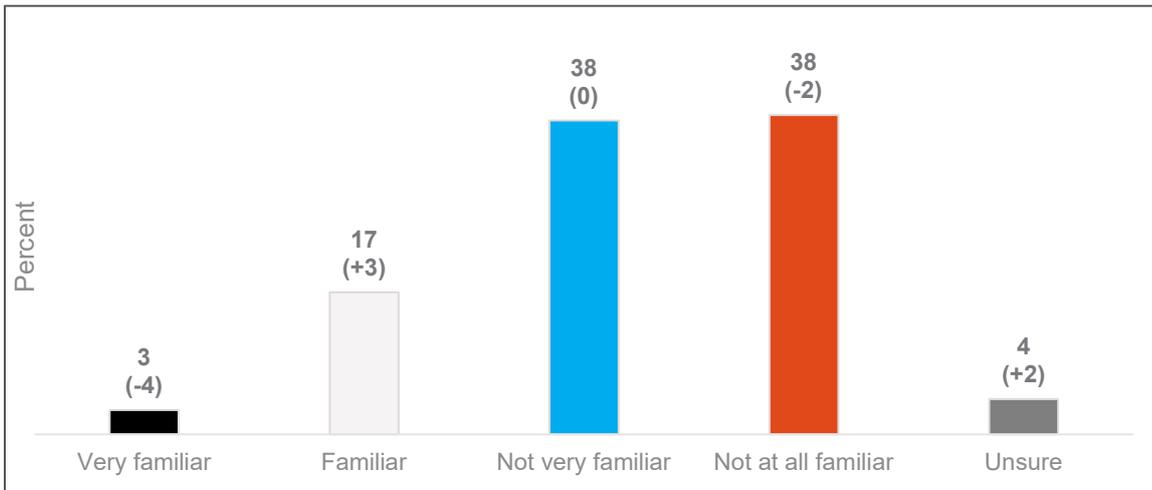


Other

Awareness of the Energy Ombudsman

20% of household consumers in Western Australia say they are familiar with the Energy Ombudsman.

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



Base: Consumers in WA (n=311)



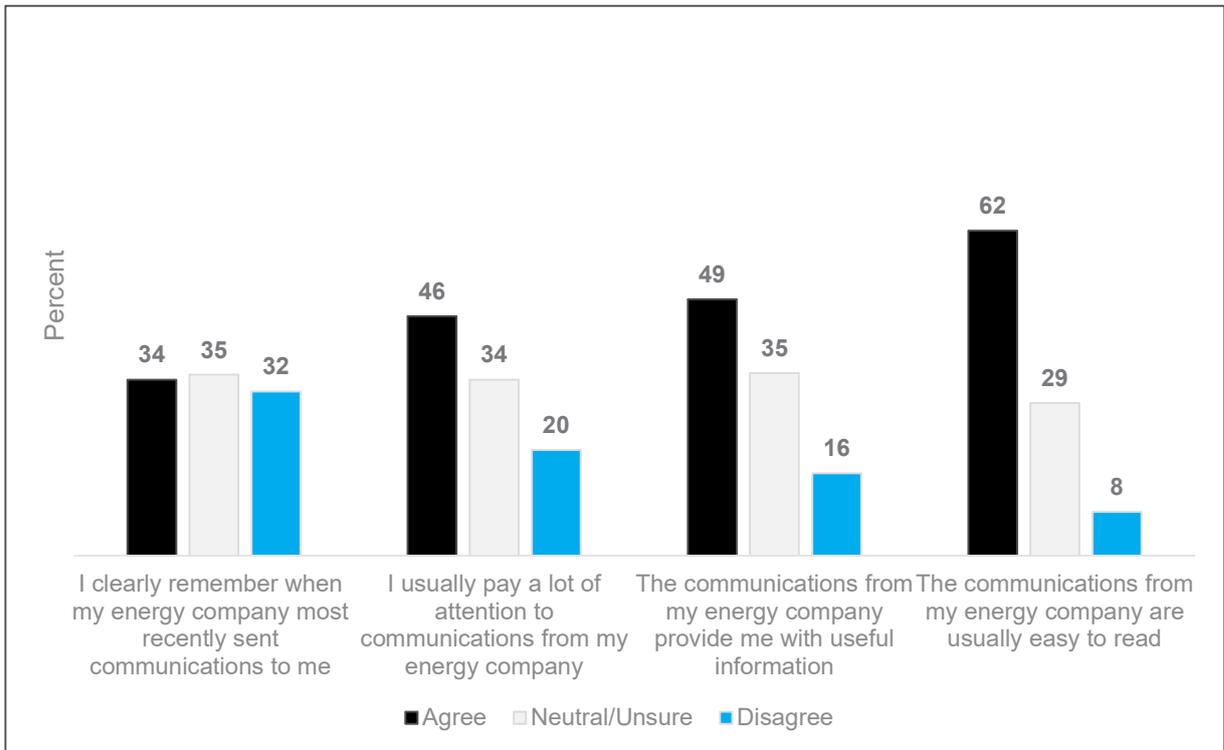
Other

Communications from energy providers

Only a third of Western Australia consumers say they clearly recall when they most recently received communication from their energy company – the lowest recall in Australia.

- Only 62% of Western Australians agree that communications from their energy company are easy to read.
- Only 49% agree that the communications from their energy company provide useful information.
- 46% agree they pay a lot of attention to communications from their energy company.
- 34% 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 WA (n=311)

CONFIDENTIAL

Energy Consumers Australia

Energy Consumer Sentiment
Survey
June 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 (Participant 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 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. Liquefied Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your roof (not solar hot water)
- 4.
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.
13. A dishwasher
14. An electricity battery storage system (used to store electricity from the grid or electricity generated in your home – especially solar electricity)
15. Solar hot water

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. Liquefied Petroleum Gas (LPG in bottles – excluding those only used for BBQs or camping)
3. Electricity generated by solar panels on your roof (not solar hot water)
4. An electricity battery storage system (used to store electricity from the electricity grid or electricity generated in your home – especially solar electricity)
- 5.
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 **business** 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 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. **[SHOW FOR CODES 12, 18 AND 19 ONLY]**
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.
16. A digital meter for your electricity supply, also known as a smart meter
17. A smart thermostat or other smart control devices (such as programmable lights, smart plugs or switches)
18. An energy management system (a product that monitors, controls or analyses energy use in your home or business)
19. **[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

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

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 (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=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

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



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

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 INFOS

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

