

METHODOLOGY DISCLOSURE STATEMENT

Project name	Consumer Energy Report Card Survey
Project reference	NGR 2405007
Research dates:	27 th September – 23 rd October 2024
Target population:	The target population for the research was Australian residents (all states and territories) aged 18+.
Research methodology:	The research comprised of a 20-minute self-complete online survey with n=4,152 participants including a sample boost of 100 extra participants who identify as Aboriginal or Torres Strait Islander, sourced from an ISO accredited market research panel.
Weighting approach:	The data was weighted using 2021 ABS Census population statistics on age, gender, location and highest level of education. It was adjusted to take into account that energy decision makers have a slightly different age and gender profile than that of the broader population. The total effective sample size after weighting was approximately 67%, equating to a margin of error of approximately +/-1.9% (at the 95% confidence interval).
Research questions:	A combination of single choice, multiple choice and open-ended (text response) questions were used in the research. All questions and response options were displayed in full during interviews.

This research was conducted in accordance with the Australian Polling Council Quality Mark standards which can be viewed here: <https://www.australianpollingcouncil.com/>

PUBLISHED QUESTIONS

Q1. <BOTH> Firstly, just a few questions to make sure we have a good mix of people in our survey. What is your age? (*Select one answer*)

PROG NOTE: SINGLE RESPONSE

1	Under 18 (PROG NOTE: TERMINATE)
2	18-24
3	25-29
4	30-34
5	35-39
6	40-44
7	45-49
8	50-54
9	50-59
10	60-64
11	65+

Q2. <BOTH> What is your gender? (*Select one answer*)

PROG NOTE: SINGLE RESPONSE

1	Male
2	Female
3	Another gender

Q3a. <BOTH> What is your postcode where you live?

PROG NOTE: 4 DIGIT RESPONSE FIELD

Q3b. <BOTH> Which of these areas best describe where you live? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	ACT
2	Greater Sydney, including outer council areas of Central Coast, Hawkesbury, Blue Mountains, Wollondilly, Campbelltown and Camden
3	Rest of NSW excluding Greater Sydney
4	Greater Melbourne, including Mornington Peninsula
5	Rest of VIC excluding Greater Melbourne
6	Greater Brisbane, including Ipswich, Logan, Beaudesert and Moreton Bay
7	Rest of QLD excluding Greater Brisbane
8	Greater Adelaide
9	Rest of SA excluding Greater Adelaide
10	Greater Perth, including Mandurah
11	Rest of WA excluding Greater Perth
12	Tasmania
13	Northern Territory

Q4. <BOTH> What is the highest level of education you have completed? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Postgraduate degree
2	Graduate diploma / certificate
3	Bachelor degree
4	Advanced diploma / diploma
5	Technical certificate
6	Year 12/11/10 or equivalent
7	Year 9 or below

Q5. <RESIDENTIAL> Who is mostly responsible for paying the energy bills and/or choosing energy products and services for your household? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	You are responsible for these things <CONTINUE>
2	You share the responsibility with someone else <CONTINUE>
3	Someone else is responsible for these things <SCREENOUT>
4	Don't know <SCREENOUT>

Q6a. <RESIDENTIAL> Do you personally identify as Aboriginal and/or Torres Strait Islander? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Yes / identify as Aboriginal and/or Torres Strait Islander <QUALIFY FOR BOOST, BUT FOR MAIN RESIDENTIAL SAMPLE DO NOT REDIRECT TO BOOST>
2	No / don't identify as Aboriginal and/or Torres Strait Islander

Q6b. <BOTH> Which of the following best describes your work status? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Working full time
2	Working part time
3	Working casually
4	Retired
5	Unemployed
6	Full-time student
7	Full time home / parent duties
98	Other

Q7. <BUSINESS> Do any of the following apply to you? *(Select one answer)*

1	You own a business
2	You work in a senior management role in a business
98	None of the above <TERMINATE AFTER Q8 IS ASKED/RECORDED>

Q8. <BUSINESS> Approximately how many employees (including yourself) work in your business?
 (Select one answer)

PROG NOTE: SINGLE RESPONSE

1	1 (only myself)
2	2-5
3	6-20
4	21-200
5	201+

Q9. <BUSINESS> Who is mostly responsible for paying energy bills and/or choosing energy products and services for your business (that you own or work for)?
 (Select one answer)

PROG NOTE: SINGLE RESPONSE

1	You are responsible for these things <BUSINESS DECISION MAKER>
2	You share the responsibility with someone else <BUSINESS DECISION MAKER>
3	Someone else is responsible for these things <TERMINATE>
4	Don't know <TERMINATE>
5	My business doesn't pay any energy bills <TERMINATE>

Q10. <BUSINESS> And what industry does your business operate in?
 (Select one answer)

PROG NOTE: SINGLE RESPONSE

1	Agriculture, Forestry and Fishing
2	Mining
3	Manufacturing
4	Electricity, Gas, Water and Waste Services
5	Construction
6	Wholesale Trade
7	Retail Trade
8	Accommodation and Food Services
9	Transport, Postal and Warehousing
10	Information Media and Telecommunications

11	Financial and Insurance Services
12	Rental, Hiring, Real Estate
13	Professional, Scientific and Technical Services
14	Administrative and Support Services
15	Public Administration and Safety
16	Education and Training
17	Health Care and Social Assistance
18	Arts and Recreational Services
19	Other Services
20	Don't know

Q99 <BUSINESS>. Which of these areas best describes the location of the business you usually work at?
 (Please select one answer)

PROG NOTE: SINGLE RESPONSE

1	ACT
2	Greater Sydney, including outer council areas of Central Coast, Hawkesbury, Blue Mountains, Wollondilly, Campbelltown and Camden
3	Rest of NSW excluding Greater Sydney
4	Greater Melbourne, including Mornington Peninsula
5	Rest of VIC excluding Greater Melbourne
6	Greater Brisbane, including Ipswich, Logan, Beaudesert and Moreton Bay
7	Rest of QLD excluding Greater Brisbane
8	Greater Adelaide
9	Rest of SA excluding Greater Adelaide
10	Greater Perth, including Mandurah
11	Rest of WA excluding Greater Perth
12	Tasmania
13	Northern Territory

ISSUES CONTEXT

Q11. <BOTH> How concerned, if at all, are you with the following issues? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW, RANDOMISE A-L, ROTATE BETWEEN 1,2,3,4, AND 4,3,2,1

	Extremely concerned	Quite concerned	Slightly concerned	Not concerned at all
	1	2	3	4
A	The cost of living			
B	The cost of electricity			
C	The economy			
D	Housing affordability and availability			
E	The healthcare system			
F	Jobs and unemployment			
G	The cost of gas (used in homes and businesses)			
H	Mortgage interest rates			
I	Climate change			
J	Education			
K	Crime			
L	The reliability of the electricity network			

Q12. <BOTH> What is your overall opinion of the following industries in Australia?
(Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW, RANDOMISE A-G, ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1

	Very positive	Somewhat positive	Neither positive nor negative	Somewhat negative	Very negative
	1	2	3	4	5
A	Telecommunications and internet				
B	Insurance				
C	Banking				
D	Water				
E	Supermarkets				
F	Electricity				
G	Gas				

PROGRAMMER NOTE: SPLIT SAMPLE 50:50 WITH HALF EACH DIRECTED TO Q13A AND HALF TO Q13B

Q13A. <BOTH> Why do you have a **(PROG NOTE: INSERT RESPONSE FROM Q12F)** opinion of Australia's electricity industry? (Please be as specific as possible in your response)

PROG NOTE: OPEN TEXT FIELD. MINIMUM 10 CHARACTERS. DO NOT ASK IF Q12F=3

Q13B. <BOTH> Why do you have a **(PROG NOTE: INSERT RESPONSE FROM Q12G)** opinion of Australia's gas industry? (Please be as specific as possible in your response)

PROG NOTE: OPEN TEXT FIELD. MINIMUM 10 CHARACTERS. DO NOT ASK IF Q12G=3

Q14. <BOTH> How much do you know about the following things? (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-I, ROTATE BETWEEN 1,2,3 AND 3,2,1

	1	2	3

	I definitely know this	I have some idea about this, but I'm not sure	I don't know what this is
A	<RESIDENTIAL> The unit of measurement on your home electricity bill		
B	<RESIDENTIAL> The name of your home energy retail company		
C	<RESIDENTIAL> The name of the energy network company that supplies energy to your house		
D	<BUSINESS> The unit of measurement on your business electricity bill		
E	<BUSINESS> The name of your business energy retail company		
F	<BUSINESS> The name of the energy network company that supplies energy to your business		
G	What a "retail tariff" is		
H	The type of retail tariff you are on		
I	Where a nearby public electrical vehicle charger is		

Q15. <BOTH> How interested are you in the following things? (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-I, ROTATE BETWEEN 1,2,3,4 AND 4,3,2,1

	1	2	3	4
	Extremely interested	Quite interested	Not very interested	Not interested at all
A	Knowing how much energy your appliances use			
B	Being able to track your energy usage whenever you want to			
C	Being a leader who promotes the benefits of sustainable energy use to others in your community			
D	Following the news about how Australia is planning to transition to clean energy			
E	Comparing different energy providers to try and get the best deal			
F	Technologies which allow you to track how much energy you use in real time			
G	Knowing about energy rebates and concessions you might be eligible for			
H	Electric vehicles			
I	Technologies that could help you run appliances at times when prices are cheaper			

Q16. <BOTH> And which of the following best characterises the type of relationship that you would like to have with Australia’s electricity system? *(Select one option)*

PROG NOTE: SINGLE RESPONSE.

1	2
BASIC RELATIONSHIP	ACTIVE RELATIONSHIP (BASIC +)
<p>For you, electricity is a basic service and all you really want is:</p> <ul style="list-style-type: none"> • Getting a good price for electricity you use (or export if you have solar) • Having a reliable electricity supply • Having good customer service from your supplier 	<p>You want more than just a basic service, and this includes things like:</p> <ul style="list-style-type: none"> • Having a choice of different tariffs to choose from (e.g. paying different prices at different times of day depending on when you use energy). • Being able to monitor your energy use in real time and adjust your usage throughout the day to save money • If you have solar and batteries, being able to choose when you store or export your energy to the grid • Having various clean energy options to choose from (e.g. green power or carbon neutral plans)

PRICE AND MARKET COMPETITION

Q17. <BOTH> In the next 12 months, do you think that electricity and gas bills will increase, decrease or stay about the same? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE PER ROW, RANDOMISE A-B, ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1

	Will increase a lot	Will increase a little	Will probably stay about the same	Will decrease a little	Will decrease a lot
	1	2	3	4	5
A	Electricity bills				
B	Gas bills				

PROGRAMMER NOTE: SPLIT SAMPLE 50:50 WITH HALF EACH DIRECTED TO Q18A AND HALF TO Q18B

Q18A. <BOTH> Why do you think electricity bills will **(PROG NOTE: INSERT RESPONSE FROM Q17A)** in the next 12 months? Who, or what do you think is responsible for this? *(Please be as specific as possible)*

PROG NOTE: OPEN TEXT FIELD. MINIMUM 10 CHARACTERS. DO NOT ASK IF Q17A = 3

Q18B. <BOTH> Why do you think gas bills will (**PROG NOTE: INSERT RESPONSE FROM Q17B**) in the next 12 months? Who, or what do you think is responsible for this? *(Please be as specific as possible)*

PROG NOTE: OPEN TEXT FIELD. MINIMUM 10 CHARACTERS. DO NOT ASK IF Q17B = 3

Q19. <BOTH> To what extent do you agree or disagree with the following statements?
(Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-G. ROTATE BETWEEN 1,2,3,4,5,6 AND 5,4,3,2,1,6

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree	Don't know
	1	2	3	4	5	6
A	The price of electricity is fair and reasonable					
B	The price of gas is fair and reasonable					
C	Government decisions and actions are helping to ensure that consumers pay a fair price for their energy					
D	There is appropriate support available for people who have difficulty affording energy bills					
E	<p><RESIDENTIAL> ASK IF NOT WA, NT, QLD GREEN AREA IE EXCLUDING Q3B=10,11,13, OR Q100=1</p> <p>BUSINESS ASK IF NOT WA, NT, QLD GREEN AREA IE EXCLUDING Q99=10,11,13, OR Q100=1</p> <p>Having a choice of electricity plans is good for people like me</p>					
F	<p><RESIDENTIAL> ASK IF IN WA, NT, QLD GREEN AREA IE Q3B=10,11,13, OR Q100=1</p> <p><BUSINESS> ASK IF IN WA, NT, QLD GREEN AREA IE Q99=10,11,13, OR Q100=1</p> <p>Having a choice of energy retailers would be a better thing for people like me</p>					
G	It's easy for me to understand my energy bill					

Q20. <RESIDENTIAL > In the last 6 months, how easy or difficult has it been for you pay your home energy bills (i.e. the ease of affordability for this cost)? *(Select one answer)*

<BUSINESS > In the last 6 months how easy, or difficult has it been for you to pay your business energy bills? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE. ROTATE BETWEEN 1,2,3,4 AND 4,3,2,1

1	Very easy
2	Quite easy
3	Quite difficult
4	Very difficult

Q21. <BOTH> Some people think that electricity, like healthcare, is a fundamental right that all Australians should have access to - **even if they can't afford it**. In principle, would you support or oppose the following things? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. ROTATE BETWEEN 1,2,3,4,5 & 5,4,3,2,1. RANDOMISE A-B

	Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose
	1	2	3	4	5
A	An additional charge on people's electricity bills to ensure that all Australians have access to electricity				
B	A new taxpayer-funded scheme which ensures that all Australians have access to electricity				

PROG NOTE: ASK IF SUPPORT ADDITIONAL CHARGE IE CODE 1-2 AT Q21 OPTION A. OTHERS GO TO Q23.

Q22. <BOTH> How much extra would you personally be willing to pay on your electricity bills (per year) to fund a program that ensures all Australians have access to electricity (even if they can't afford it)?

PROG NOTE: ALLOW RANGE 0-999

THE ENERGY TRANSITION

Q23. <BOTH> Overall, do you feel that the transition to renewable energy is a good thing or a bad thing for each of the following? (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW, ROTATE BETWEEN 1,2,3,4,5,99 AND 5,4,3,2,1,99

	Very good	Somewhat good	Neither good nor bad	Somewhat bad	Very bad	Don't know
	1	2	3	4	5	99
A	Australia overall					
B	Your local community					
C	Your household					
D	The economy					
E	The environment					
F	The reliability of the electricity network					
G	Electricity prices in the next few years					
H	Electricity prices in the long term					
I	<BUSINESS> Your business					

Q24. <BOTH> How important are each of the following things in reducing carbon emissions and helping Australia meet its emissions targets? (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-H. ROTATE BETWEEN 1,2,3,4,99 AND 4,3,2,1,99

	Extremely important	Quite important	Slightly important	Not important at all	Don't know
	1	2	3	4	99
A	Making houses more energy efficient				
B	Encouraging more rooftop solar				
C	Building more large-scale energy projects (i.e. wind and solar farms)				
D	Closing down coal-fired power stations				
E	Increasing the use of electric cars				
F	Reducing the consumption of gas in households				
G	Building nuclear power plants in Australia				
H	Local renewable projects like shared community solar or batteries				

Q25. <BOTH> Do you agree or disagree with the following statements? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-D. ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
	1	2	3	4	5
A	You clearly understand why Australia is transitioning to clean energy				
B	<RESIDENTIAL> Government and other groups have clearly explained how the energy transition will affect households like yours				
C	<BUSINESS> Government and other groups have clearly explained how the energy transition will affect businesses like yours				
D	You feel confident that Australia has a well-planned approach to manage the transition to clean energy				

HOME EFFICIENCY, ELECTRIFICATION AND TECHNOLOGY

Q26. <RESIDENTIAL> Do you agree or disagree with the following statements? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-B. ROTATE BETWEEN 1,2,3,4,5 AND 4,3,2,1,5

	Strongly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Strongly disagree
	1	2	3	4	5
A	On hot days you can keep your home at a comfortable temperature without having to use a lot of energy				
B	On cold days you can keep your home at a comfortable temperature without having to use a lot of energy				

Q27. <RESIDENTIAL> Does your home have the following home insulation features? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-D. ROTATE BETWEEN 1,2,3 AND 2,1,3

	Yes	No	Don't know
	1	2	3
A	Ceiling insulation		
B	Floor insulation		
C	Double or triple glazed windows		
D	Draft proofing (sealing gaps around windows, doors and other areas)		

Q28a. <RESIDENTIAL> Does your home have, or are you considering, any of the following technologies?
 (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-H. ROTATE BETWEEN 1,2,3,4,5 AND 4,3,2,1,5

	You already have this	You're currently researching options for buying this technology	You're considering buying this technology but are not actively researching it	You're not researching or considering buying this technology	Don't know
	1	2	3	4	5
A	A smart meter at your home (which measures your electricity use throughout the day and sends this information to your electricity supplier)				
B	Rooftop solar panels				
C	A home battery system for storing electricity				
D	A home electric vehicle charger				
E	A fully electric vehicle (not hybrid)				
F	A hybrid vehicle (electric and fuel)				
G	A home automation system that allows you to remotely control lights or appliances e.g. via an app				
H	An app, or in home display, that helps you to monitor electricity use and costs in real time				

Q28b. <BUSINESS> Does your business have, or are you considering, any of the following technologies?
(Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-H. ROTATE BETWEEN 1,2,3,4,5 AND 4,3,2,1,5

	You already have this	You're currently researching options for buying this technology	You're considering buying this technology but are not actively researching it	You're not researching or considering buying this technology	Don't know
	1	2	3	4	5
A	A smart meter at your business (which measures your electricity use throughout the day and sends this information to your electricity supplier)				
B	Rooftop solar panels				
C	A battery system for storing electricity				
D	Electric vehicle charging at your business				
E	A company-owned fully electric vehicle (not hybrid)				
F	A company owned hybrid vehicle (electric and fuel)				
G	An energy automation system that allows the business to remotely control lights or appliances e.g. via an app				
H	An application or display that helps you monitor electricity use and costs in real time				

Q29a. <RESIDENTIAL> In the last 6 months have you accessed your home energy usage data in any of the following ways? (Select all that apply)

PROG NOTE: MULTI RESPONSE. RANDOMISE 1-5, CODE 7 IS EXCLUSIVE

1	An appliance app
2	A retailer app
3	An in-home display
4	Powerpal
5	Your bill
6	Other (please specify)
7	None of the above

Q29b. <BUSINESS> In the last 6 months have you accessed your business energy usage data in any of the following ways? *(Select all that apply)*

PROG NOTE: MULTI RESPONSE. RANDOMISE 1-5, CODE 7 IS EXCLUSIVE

1	An appliance app
2	A retailer app
3	An on-premises display
4	Powerpal
5	Your bill
6	Other <i>(please specify)</i>
7	None of the above

Q30. <RESIDENTIAL> Does your home electricity supply currently involve a “time-of-use tariff” or “demand-tariff” (i.e. an electricity plan where you are charged different rates at different times of the day)? *(Select one answer)*

<BUSINESS > Does your business electricity supply currently involve a “time-of-use tariff” or “demand-tariff” (i.e. an electricity plan where you are charged different rates at different times of the day)? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Yes
2	No
3	Don't know

Q31. <BOTH> Did you choose to be on a “time-of-use” or “demand tariff” or did your retailer put you on it without your choice? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE. ASK IF Q30 = 1

1	Chose to be on a time-of-use / demand tariff
2	Retailer put you on a time-of-use / demand tariff
3	Don't know

Q32a. <RESIDENTIAL> To what extent are you deliberately changing the time of day that you use electrical appliances to save money? *(Select one answer)*

Q32b. <BUSINESS> To what extent is your business deliberately shifting the time of day that you use appliances or other electrical equipment to save money? *(Select one answer)*

PROG NOTE: ASK IF Q30=1. SINGLE RESPONSE. ROTATE BETWEEN 1,2,3,4 AND 4,3,2,1

1	Regularly
2	Sometimes
3	Rarely
4	Never

Q33. <RESIDENTIAL> Are you shifting the time of day you use any of these appliances in order to save money? (Select all that apply)

PROG NOTE: ASK IF Q30=1. MULTI RESPONSE. RANDOMISE 1-6 THEN 7-8 LAST

1	Dishwasher
2	Heater
3	Hot water heater
4	Dryer
5	Washing machine
6	Air conditioner
7	Other (specify)
8	None of the above

Q34. <RESIDENTIAL> Is your home currently connected to gas? (Select one answer)

PROG NOTE: SINGLE RESPONSE.

1	Yes, via piped gas
2	Yes, via delivered gas bottles
3	No
4	Don't know

Q35. <RESIDENTIAL> Do you currently use gas or electricity for the following things at your home? (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-D. ROTATE BETWEEN 1,2,98,99 AND 2,1,98,99.

	Gas	Electricity	Don't know	Not relevant for me
	1	2	98	99
A	For heating your home			
B	For your oven			
C	For your cooktop			
D	For your water heater			

Q36. <RESIDENTIAL> If both options were available, and you needed to buy a new appliance, would you prefer to use electricity or gas for the following household purposes? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE, RANDOMISE A-D. ROTATE BETWEEN 1,2,99 AND 2,1,99

	Gas	Electricity	Not relevant for me
	1	2	99
A	For heating your home		
B	For your oven		
C	For your hot water service		
D	For your cooktop		

Q37. <RESIDENTIAL> Some Australian households have been cancelling their gas supply and converting their home to running on electricity only. Which of the following best describes you? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE. ROTATE BETWEEN 1,2,3,4,5,6 AND 6,5,4,3,2,1

1	You have already cancelled your gas supply and switched to electricity only
2	You'll probably cancel your gas supply within the next 2 years
3	You'll probably cancel your gas supply within the next 5 years
4	You'll probably cancel your gas supply within the next 10 years
5	You don't plan to cancel your gas supply
6	You've never had gas at your home

Q38 <BOTH>. In order to reduce carbon emissions and transition to more renewable energy, some State Governments have, or are considering, mandating that all newly built homes must be "all electric" for their heating, cooking and hot water. They can't be connected to the gas network, but householders could still use bottled gas if they chose.

In principle do you support or oppose making newly built homes electric-only? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE. ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1.

Strongly support	Somewhat support	Neither support nor oppose	Somewhat oppose	Strongly oppose
1	2	3	4	5

SATISFACTION AND ATTITUDES TO CURRENT GAS PROVIDER

Q39. <BUSINESS> Does your business currently use piped gas for any purpose? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Yes
2	No

Q40. <BUSINESS> What does your business use gas for? *(Select one answer)*

PROG NOTE: ASK IF Q39=1. SINGLE RESPONSE, RANDOMISE 1-3

1	Cooking
2	Heating your business space
3	Manufacturing, machinery or tools
4	Another reason (specify)

Q41. <BUSINESS> How significant are each of the following costs to your business? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW, RANDOMISE A-B, ROTATE BETWEEN 1,2,3, AND 3,2,1

	One of your biggest overheads	A substantial cost, but not one of your biggest overheads	A minor expense in the scheme of things
	1	2	3
A	Electricity		
B	Gas <ASK IF Q39=1>		

Q42. <RESIDENTIAL> Overall, how satisfied are you with your current gas provider? *(Select one answer)*

<ASK IF Q34 =1>

<BUSINESS> Overall, how satisfied are you with your current business gas provider? *(Select one answer)*

<ASK IF Q39=1>

PROG NOTE: SINGLE RESPONSE, ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1

1	Very satisfied
2	Somewhat satisfied
3	Neither satisfied nor dissatisfied
4	Somewhat dissatisfied
5	Very dissatisfied

Q43. <RESIDENTIAL> How satisfied are you with the following aspects of your gas provider’s services?
(Select one answer per item) **<ASK IF Q34 = 1**

<BUSINESS> How satisfied are you with the following aspects of your business gas provider’s services?
(Select one answer per item) **<ASK IF Q39=1>**

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-D. ROTATE BETWEEN 1,2,3,4,5, AND 5,4,3,2,1

	Very satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
	1	2	3	4	5
A	Reliability of supply				
B	Price				
C	Customer service				
D	The clarity of usage information you are provided with				

SATISFACTION AND ATTITUDES TO CURRENT ELECTRICITY PROVIDER

Q44. <RESIDENTIAL> Overall, how satisfied are you with your current electricity provider(s)? *(Select one answer)*

<BUSINESS> Overall, how satisfied are you with your current business electricity provider(s)? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE. ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1

1	Very satisfied
2	Somewhat satisfied
3	Neither satisfied nor dissatisfied
4	Somewhat dissatisfied
5	Very dissatisfied

Q45. <RESIDENTIAL> How satisfied are you with the following aspects of your electricity provider's services? *(Select one answer per item)*

<BUSINESS> How satisfied are you with the following aspects of your business electricity provider's services? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-D. ROTATE BETWEEN 1,2,3,4,5, AND 5,4,3,2,1

	Very satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
	1	2	3	4	5
A	Reliability				
B	Price				
C	Customer service				
D	The clarity of usage information you are provided with				

Q46. <RESIDENTIAL> In the last 6 months have you done, or experienced, any of the following things in relation to your home electricity service? *(Select one answer per item)*

<BUSINESS> In the last 6 months have you done, or experienced, any of the following things in relation to your business electricity service? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-D. ROTATE BETWEEN 1,2 AND 2,1

	Yes	No
	1	2
A	Experienced an electricity outage (either planned or unplanned)	
B	Contacted your electricity provider about difficulty in paying a bill	
C	Contacted electricity provider in relation to solar, batteries or other new technologies	
D	Considered or changed your retail tariff structure	

Q47. <BOTH> How satisfied are you with following interactions with your electricity service provider in the last 6 months? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW, RANDOMISE A-D, ROTATE 1,2,3,4,5 AND 5,4,3,2,1

	Very satisfied	Somewhat satisfied	Neither satisfied nor dissatisfied	Somewhat dissatisfied	Very dissatisfied
	1	2	3	4	5
A	<IF Q46 A=1> The speed of restoring power after an outage				
B	<IF Q46 A=1> Your energy provider's communications with you about recent outages				
C	<IF Q46 B=1> Your energy provider's assistance in relation to your difficulty in paying a bill				
D	<IF Q46 C=1> Your energy provider's assistance in relation to your contact with them about solar, batteries or other new technologies				

Q48. <RESIDENTIAL> Approximately, how many electricity outages has your home experienced in the last 6 months? *(Select one answer)*

<BUSINESS> Approximately, how many electricity outages has your business experienced in the last 6 months? *(Select one answer)*

PROG NOTE: ONLY DISPLAY IF Q46 A=1, SINGLE RESPONSE, ROTATE BETWEEN 1,2,3,4,5 AND 5,4,3,2,1

1	2	3	4	5	More than 5
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Q49. <BOTH> And what was causes of the electricity outages you experienced in the last 6 months...?
(Select one answer)

PROG NOTE: SINGLE RESPONSE. ASK IF Q46 A=1

1	Unplanned outages caused by weather or accidents
2	Planned outages for maintenance or network upgrade
3	A combination of unplanned and planned outages
4	Don't know

Q50a. <RESIDENTIAL> Which of the following best describes your ability to choose your electricity supplier? (Select one answer)

PROG NOTE: SINGLE RESPONSE: ASK IF NOT WA, NT, QLD GREEN AREA IE EXCLUDING Q3B=10,11,13, OR Q100=1

1	My household can choose our electricity supplier
2	Our electricity supplier is chosen by our strata or residential management company - it's not something we can choose on our own
3	Don't know

Q50b. <BUSINESS> Which of the following best describes your business's ability to choose your electricity supplier? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE: ASK IF NOT WA, NT, QLD GREEN AREA IE EXCLUDING Q3B=10,11,13, OR Q100=1>

1	My business can choose the electricity supply company we go with
2	Our electricity supplier is chosen by our premises management company - it's not something we can choose on our own
3	Don't know

Q51. <RESIDENTIAL> Approximately how often do you review your current household energy plan and investigate whether there are better options for you? *(Select one answer)*

<BUSINESS> Approximately how often do you review your current business energy plan and investigate whether there are better options for you? *(Select one answer)*

PROG NOTE <RESIDENTIAL>: SINGLE RESPONSE: ASK IF NOT WA, NT, QLD GREEN AREA IE EXCLUDING Q3B=10,11,13, OR Q100=1>

PROG NOTE <BUSINESS>: SINGLE RESPONSE: ASK IF NOT WA, NT, QLD GREEN AREA IE EXCLUDING Q99=10,11,13, OR Q100=1>

1	Several times a year
2	Around once a year
3	Once every couple of years
4	Once every 3-5 years
5	Less frequently than every 5 years
6	Never

INFORMATION NEEDS AND ADVICE

Q52. <RESIDENTIAL> How confident are you that you're on a home energy plan that is competitively priced? *(Select one answer)*

<BUSINESS> How confident are you that you're on a business energy plan that is competitively priced? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE. ROTATE BETWEEN 1,2,3,4,5 AND 4,3,2,1,5

1	Very confident
2	Somewhat confident
3	Not very confident
4	Not at all confident
5	Don't know

Q53. <BOTH> How easy is it to find the information you need about the following things? *(Select one answer per item)*

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-C, ROTATE BETWEEN 1,2,3,4 AND 4,3,2,1

	Very easy	Somewhat easy	Somewhat difficult	Very difficult
	1	2	3	4
A	Energy plans and pricing			
B	Energy efficiency and home upgrades <RESIDENTIAL ONLY>			
C	Energy efficiency and business upgrades <BUSINESS ONLY>			
D	The energy efficiency of products and appliances			

Q54. <BOTH> Which of the following have you ever used to find out information about energy (e.g. plans, efficiency etc.)? *(Select all that apply)*

PROG NOTE: MULTIPLE RESPONSE, RANDOMISE 1-16 THEN 96-99. CODES 98-99 ARE EXCLUSIVE

1. The Federal Government
2. The **(PROG NOTE: INSERT STATE OR TERRITORY)** Government
3. Your local council
4. Your electricity retailer
5. Your electricity distributor
6. Energy Made Easy website (Don't ask in WA or NT)
7. Energy Compare website (Ask VIC only)
8. A consumer advocacy organisation (e.g. Choice)
9. Online comparison sites
10. Internet forums

11. An electrician
12. An energy industry association
13. A solar energy or battery company e.g. an installer or retailer
14. The media
15. Friends / family
16. General google search
96. Another non-government agency (specify)
97. Someone else (specify)
98. Don't know
99. Wouldn't trust anyone **EXCLUSIVE**

Q55. <BOTH> This research has been commissioned by [Energy Consumers Australia](#) - a government-funded organisation that represents Australian energy consumers.

What are the issues that you think they should focus on most to ensure Australia's energy system is best meeting the current needs of energy consumers like you?

(Please be as specific as possible)

PROG NOTE: OPEN TEXT FIELD. MINIMUM 10 CHARACTERS

Q56. <BOTH> Thinking now about the future, what do you think [Energy Consumers Australia](#) should focus on most to ensure that Australia's energy system is best meeting the future needs of energy consumers like you?

(Please be as specific as possible)

PROG NOTE: OPEN TEXT FIELD. MINIMUM 10 CHARACTERS

DEMOGRAPHICS

Q57. <RESIDENTIAL> How often does your home receive your **electricity bill**? *(Select one answer)*

<BUSINESS> How often does your business receive your **electricity bill**? *(Select one answer)*

Or, if you have a payment arrangement, how often does your main bill arrive from the electricity company?

PROG NOTE: SINGLE RESPONSE

1	Monthly
2	Bi-monthly / every 2 months
3	Quarterly / every 3 months
4	Bi-annually / every 6 months
5	Annually / every 12 months
6	Other (specify) ____
7	Don't know

Q58. <RESIDENTIAL> Roughly how much was your most recent **(insert "monthly", "bi-monthly", "quarterly", bi-annually", "annually" if chosen from Q57.) home electricity bill**? Please check your latest bill if it is handy, or otherwise, your best estimate is fine.

<BUSINESS> Roughly how much was your most recent **(insert "monthly", "bi-monthly", "quarterly", bi-annually", "annually" if chosen from Q57.) business electricity bill**? Please check your latest bill if it is handy, or otherwise, your best estimate is fine.

\$.....last bill

I have no idea -couldn't even roughly estimate

Q59. <RESIDENTIAL> How often does your home receive your **gas bill**? *(Select one answer)*

<BUSINESS> How often does your business receive your **gas bill**? *(Select one answer)*

Or, if you have a payment arrangement, how often does your main bill arrive from the gas company?

PROG NOTE: SINGLE RESPONSE. ASK GAS USERS ONLY IE CODE 1 IN Q34 OR CODE 1 IN Q39

1	Monthly
2	Bi-monthly / every 2 months
3	Quarterly / every 3 months
4	Bi-annually / every 6 months
5	Annually / every 12 months
6	Other (specify) ____
7	Don't know

Q60 <RESIDENTIAL> Roughly how much was your most recent **(insert "monthly", "bi-monthly", "quarterly", bi-annually", "annually" if chosen from Q59.) home gas bill**? Please check your latest bill if it is handy, or otherwise, your best estimate is fine.

<BUSINESS> Roughly how much was your most recent **(insert "monthly", "bi-monthly", "quarterly", bi-annually", "annually" if chosen from Q59.) gas bill**? Please check your latest bill if it is handy, or otherwise, your best estimate is fine.

PROG NOTE: ASK GAS USERS ONLY IE CODE 1 IN Q34 OR CODE 1 IN Q39

\$.....last bill

I have no idea -couldn't even roughly estimate

Q62 <RESIDENTIAL> And what is your household's overall annual income before tax or other deductions? Your best estimate is fine. *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	\$1 - \$9,999
2	\$10,000 - \$19,999
3	\$20,000 - \$29,999
4	\$30,000 - \$39,999
5	\$40,000 - \$49,999
6	\$50,000 - \$59,999
7	\$60,000 - \$79,999
8	\$80,000 - \$99,999
9	\$100,000 - \$124,999
10	\$125,000 - \$149,999
11	\$150,000 - \$199,999
12	\$200,000 - \$249,999
13	\$250,000 or more
99	I'd prefer not to say

Q63. <RESIDENTIAL> Which of the following best describes the type of home where you currently live? *(Select one answer)*

1	A larger, free-standing house (e.g. double story or 4+ bedrooms)
2	A smaller, freestanding house (e.g. single story and 3 or less bedrooms)
2	A semi-detached house (e.g. terraces, townhouse, duplex)
3	An apartment or unit
4	A retirement home
5	A mobile home, such as a caravan, motorhome or camper trailer
6	A rural property or farm
7	Other (specify)

Q64. <RESIDENTIAL> Including yourself, how many people in the following age groups are in your household? (Enter a number for each item)

PROG NOTE: ALLOW NUMERICAL RESPONSE IN RANGE 0-99

1	5 years and under	--
2	6 to 12 years	--
3	13 to 17 years	--
4	18 years or older	--

Q65. <RESIDENTIAL> Do you own or rent the home you live in? (Select one answer)

PROG NOTE: SINGLE RESPONSE

1	Renting
2	Paying off a mortgage
3	Own your home outright
98	Other (please specify)

Q66. <BOTH> Do any of the following apply to you? (Select one answer per item)

PROG NOTE: SINGLE RESPONSE PER ROW. RANDOMISE A-T

		Yes	No
A	I identify as Aboriginal and/or Torres Strait Islander	1	2
B	I prefer to speak a language other than English at home or with close family members	1	2
F	I receive personal government allowance or benefits (e.g. JobSeeker, Newstart, Youth Allowance, carer payments, widow allowance, aged pension, disability pension)	1	2
K	I was born in a predominately non-English speaking country	1	2
M	I'm self employed	1	2
O	I am registered as a life-support customer for electricity (i.e. you have registered your premise as requiring life support equipment for someone who lives there)	1	2
P	I am receiving a medical energy concession	1	2
Q	I live in a "sharehouse" (i.e. I share a home with people who aren't my partner or direct family members)	1	2
R	I live in a "multigenerational home" with at least 3 generations of my family (e.g. children, parents and grandparents)	1	2

S	I have a health condition or disability which impacts the way I use or interact with energy	1	2
T	I live with someone who has a health condition or disability which impacts the way they use or interact with energy	1	2

Q67. <BOTH> How would you describe your current financial situation? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Doing well and feeling comfortable
2	Doing OK and making ends meet
3	Having some difficulty but just making ends meet
4	Having a lot of difficulty paying bills and covering basic living expenses

Q68 <RESIDENTIAL> Are you on any of the following payment plans with your energy provider? *(Select all that apply)*

PROG NOTE: SINGLE RESPONSE. CODE 3 IS EXCLUSIVE

1	A hardship program
2	A payment plan with your retailer (i.e. paying an agreed instalment weekly, fortnightly or monthly to help you with your budget)
3	Neither

Q69. <BOTH> Are you eligible to vote in Australian elections? *(Select one answer)*

PROG NOTE: SINGLE RESPONSE

1	Yes
2	No

PROG NOTE: ASK ALL ELIGIBLE TO VOTE IE CODE 1 IN Q69

Q70. <BOTH> If a Federal Election for the House of Representatives was held today, which one of the following would you vote for? (*Select one answer*)

PROG NOTE: SINGLE RESPONSE. RANDOMISE 1-6 THEN 98,11 LAST

	NSW/ACT/VIC/SA/WA/TAS	QLD	NT
Labor Party	1	1	1
Liberal Party	2	-	
Nationals	3	-	
Country Liberals	-	-	4
Liberal National Party	-	5	-
The Greens	6	6	6
Another Party (<i>Please specify</i>)	98	98	98
An independent (<i>Please specify</i>)	11	11	11