COTA Energy Survey 2014

Residential energy use and attitudes and perceptions to the Australian energy sector of COTA members

25 February 2015

The information in this report is of a general nature. It is not intended to be relied upon for the making of specific financial decisions.

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The views expressed in this document do not necessarily reflect the views of the Consumer Advocacy Panel or the Australian Energy Market Commission.

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COTA Energy Survey

A Member Survey

Conducted in August 2014

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- **Building Industry and Trades:** Sustainable and green building products, attitudes and actions of building tradespeople, home automation and digital technology in the home

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KEY FINDINGS

Some of the key findings of the COTA survey are as follows:

- The overall sample consists of people who are reasonably well established and educated, and with a high proportion who still engage in some level of employment. 80% of survey respondents are retired, 80% have higher or tertiary education, and 80% own their home.
- There is high level of awareness for climate change issues and causes, with only 10% of the sample considering that climate change is caused by natural circumstances.
- There is a high level of awareness regarding being energy efficient, and awareness of its associated cost savings, and significant practice of home energy conservation activities. There is an overall understanding on what constitutes best practice in residential energy conservation. The sample would be prepared to invest to cut their energy bills significantly.
- 82% of households in the survey believe that they are good practitioners of energy management. There is some scope for reminding and encouraging the sample to improve on the consistency of their energy conservation practices.
- Society as a whole, governments and the energy sector are seen not to be supportive enough in addressing energy conservation. There is a strong view that more can be done by a variety of parties to help conserve our energy resources.
- COTA could have a significant role in providing advice and information on energy efficiency techniques. COTA is rated on a par with the Internet, and above all other potential sources of advice (media, family and friends, governments and others).
- Over 38% of the sample respondents have solar PV. This is 2.6 times the Australian average, and reinforces that the sample data has been generated by an engaged energy consumer group with the means and the willingness and interest to invest in energy solutions.
- 93% have a level of air conditioning in their homes, while the national average is 61%.
- There is relatively low take-up of hardship programs. Energy bills are generally paid on time, but the high price of energy and energy poverty are still seen to be significant issues. 12% of the sample respondents have difficulty paying an energy bill, which equates to about 1 in 8 households in the survey having difficulty paying energy bills.
- Energy usage levels are generally about 25% lower than the national average. The difference is estimated at about $10 a week. The total energy market for Australians over the age of 65, both electricity and gas, is estimated to be $449m, with electricity comprising 71% and gas 29%. There are many factors that are likely to contribute to

the relatively low bills, including smaller households, high take up of solar PV in the case of electricity bills, and efficiency and awareness of energy use.

- Survey respondents engage with their energy bills. There is a trend within the sample for some consumers to prefer to pay bills more frequently than currently.
- There is some knowledge of new technologies, but there is still opportunity to educate the sample further on new tools and technologies, and emerging trends in energy management. Consistent with this, knowledge of smart meter technology and rollout plans is lower than we would expect in Victoria, given that the rollout is now almost complete.
- When asked about specific aspects of their energy supply, reliability and quality of supply was ranked as a primary concern for the respondents. It ranked considerably higher than the second and third rated concerns of increasing the overall efficiency of energy usage, and saving the household money. We understand that energy affordability has previously often been found to be a primary concern among older Australians. The results here may reflect the wording of the options in the question which did not specifically mention energy affordability, as well as the demographics of the survey.
- Approximately one in five respondents has switched either their electricity or gas retailer (or both) in the last two years.
- Significant numbers of respondents could be put off switching energy retailer because they believe the retailers are all the same, or find switching difficult or confusing.
- Pricing and rebates are considered by respondents to be the most important attributes in switching retailers. Respondents were also looking for suppliers they could trust. The sample does not react positively to direct marketing, and is more likely to switch retailer if there is a direct recommendation from a friend or family member.
- The value placed on the Energy Star rating system is higher than in previous studies.
- In general, energy prices are considered to be high, and it is believed that further privatisation will see energy prices increase. There was a high level of scepticism in the survey that prices would be reduced through the abolition of the carbon tax.

SURVEY RESULTS

The survey of COTA members was conducted by email on behalf of COTA Australia in August 2014. No individual question was mandated; survey respondents could answer as many or as few questions as they wanted.

Appendix 1 contains the actual survey questions that were deployed.

The survey generated 1,371 full or partial results. The level of ignored questions was extremely low, with a median rate of 91% of survey respondents answering each question.

The resulting data from the survey results has been analysed according to the valid responses.

All non-responses have been omitted from the calculations. The results are presented as percentages of answered responses, and in some cases the actual numbers are included to illustrate the data better.

Most of the responses are reported only nationally across the survey. Some are split out by jurisdiction to illustrate where significant differences may have been expected or were actually found.

The survey results are set out in the following four report sections:

- Part A: Demographics
- Part B: Attitudes to energy, energy use, and energy purchase
- Part C: Energy management
- Part D: Energy retailers and other industry engagement

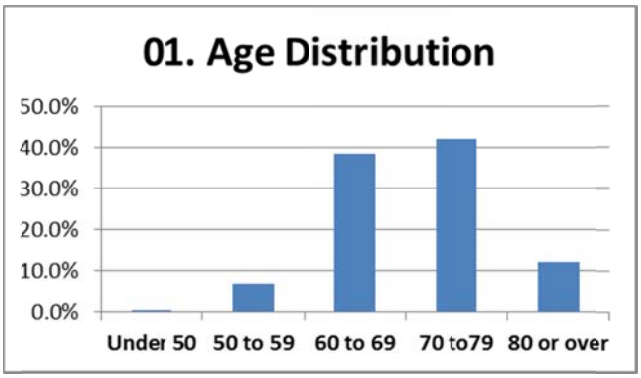
Additionally, at the end of the survey, there was an opportunity for respondents to provide free text comments on any part of the survey. Many respondents congratulated COTA on undertaking the survey, and looked forward to positive outcomes.

PART A: DEMOGRAPHICS

01. Age bracket

The sample is reasonably distributed between the two categories of 60 to 69, and 70 to 79, which together represent 80.5% of the total sample. Including the over 80's takes the coverage to 92.7%.

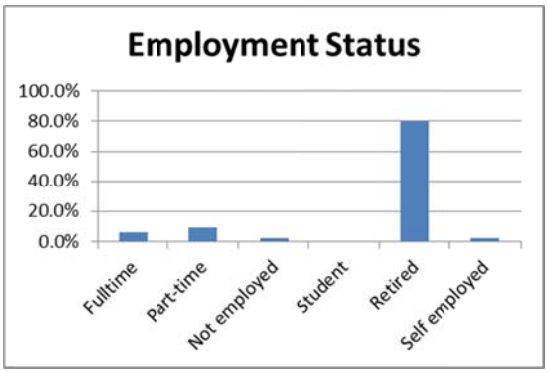
Age	Distribution
Under 50	0.5%
50 to 59	6.9%
60 to 69	38.4%
70 to79	42.1%
80 or over	12.2%



02. Employment status

82% of the sample comprised retirees and people who described themselves as not employed. This is set against a combined percentage of full, self, and part-time employment of 18%. This figure of 18% is above the Australia average of 12% of people over the age of 65 years who still engage in work at some level.

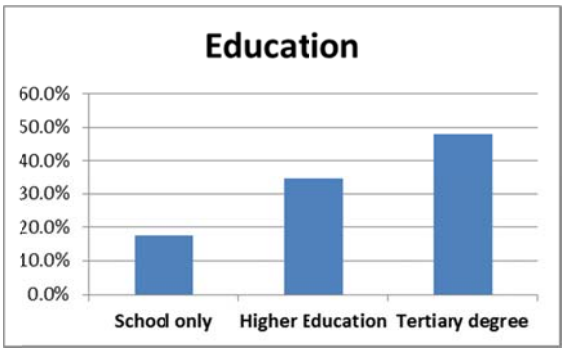
	Employment Status
Fulltime	6.0%
Part-time	9.1%
Not employed	2.2%
Student	0.2%
Retired	79.9%
Self employed	2.5%



03. Education

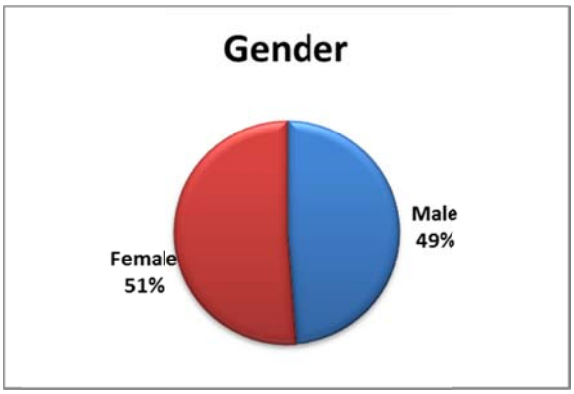
The sample is on average well educated, with 82.5% holding some form of higher degree. The fact that the sample is well educated correlates positively with the findings of the higher employment figures in Q.02.

	Education
School only	17.5%
Higher Education	34.5%
Tertiary degree	48.0%



04. Gender

	Gender
Male	48.8%
Female	51.2%



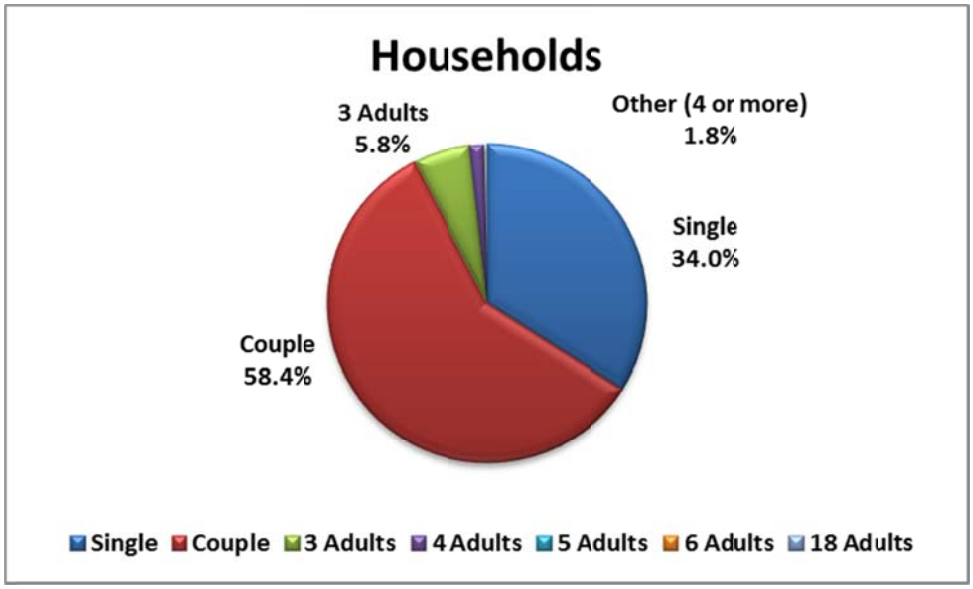
05. Household construction

Most of the sample households included 2 adults (58%) or 1 adult (34%).

The incidence of children in the home is very low, with only 19 households (representing 1.6% of the sample) reporting any children in the household. This is consistent with the age profile of the sample.

There was one outlying household in the sample with 18 adults and 11 children. This rare occurrence may represent either a commune or a religious group.

			Children				
Adults	Percentage	Count	1	2	3	4	11
Single	34.0%	408	6		1		
Couple	58.4%	700	6				
3 Adults	5.8%	70	1	1			
4 Adults	1.4%	17		1	1		
5 Adults	0.2%	2					
6 Adults	0.1%	1	1				
18 Adults	0.1%	1					1
Totals:	100%	1199	Households with children = 19 (which is 1.6% of the sample)				



06. Distribution

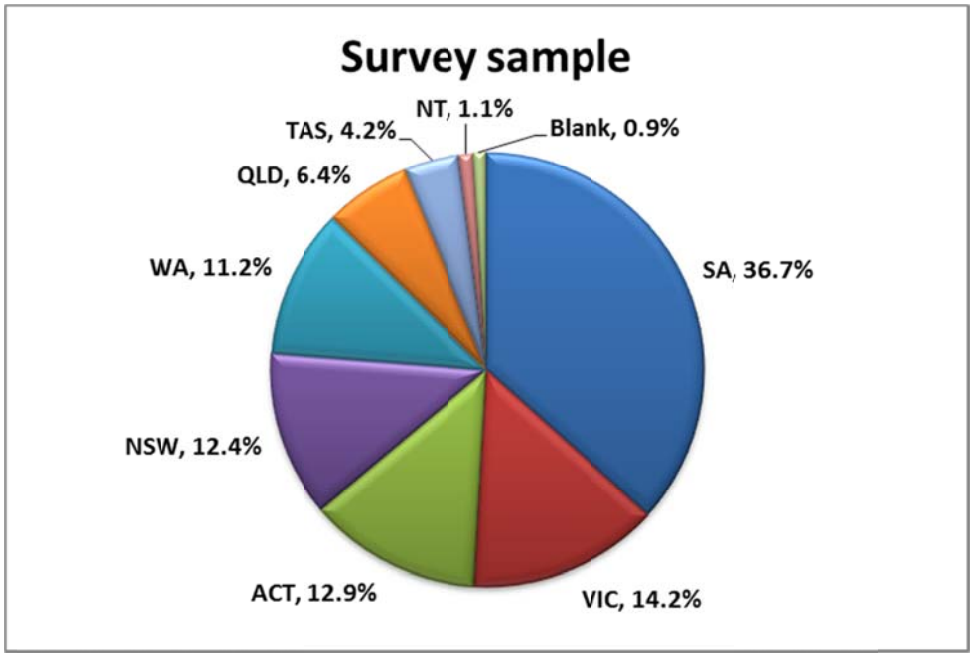
Comparing the survey sample with the proportion of Australians aged over 65 in each jurisdiction shows that South Australia and the ACT are over-represented in the survey sample, while Victoria, New South Wales and Queensland are under-represented.

The distribution of respondents does, however, correlate reasonably well with the distribution of COTA member households across the different states and territories (with some under-representation of COTA members in South Australia, and some over-representation in the ACT and New South Wales).

No weightings have been applied to the data.

Jurisdiction	Count of survey respondents	Survey sample	Proportion of over 65s in each jurisdiction	Distribution of COTA member households by jurisdiction
SA	503	37%	8%	50%
VIC	195	14%	25%	13%
ACT	177	13%	1%	7%
NSW	170	12%	34%	9%
WA	153	11%	9%	10%
QLD	88	6%	19%	8%
TAS	57	4%	3%	2%
NT	15	1%	1%	1%
Blank	13	1%		
Totals	1371	100%	100%	100%

Sources: COTA Australia; ABS 3235.0 - Population by Age and Sex, Regions of Australia, 2013. Released 28/08/2014

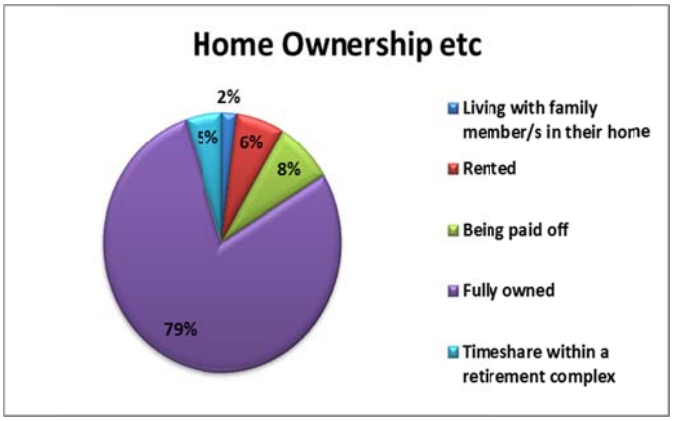


07. Home ownership

Just short of 80% of respondents fully own their home. Over 91% have equity within their homes. These high proportions present opportunities for this sample to invest in their homes, to support energy conservation, and to install technologies such as solar PV. This is reflected in responses to later survey questions regarding uptake of these measures.
If COTA were to offer specific energy efficiency services or advice, there may well be a positive take-up of these services.

Those opportunities are not available to those in rental accommodation who do not control the investment in the houses where they live and who often face poor quality housing stock which may not be well insulated and not so well maintained, as compared to owner-occupied homes.

	Distribution
Living with family member/s in their home	2.1%
Rented	6.5%
Being paid off	7.8%
Fully owned	78.6%
Timeshare within a retirement complex	5.1%



The COTA Australia sample has a slightly higher level of home ownership than the national average.

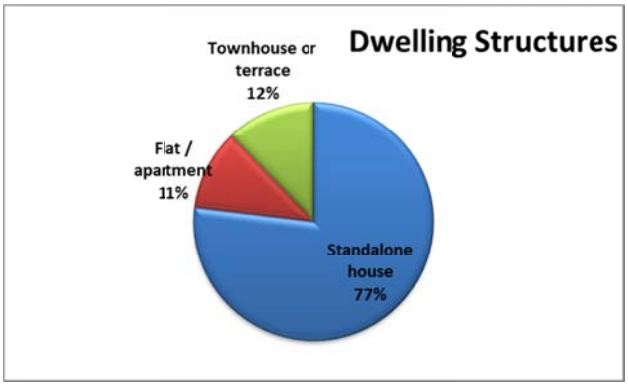
The ABS average for home ownership is 82.1% for couples over 65 years, and 71.9% for singles over 65 years.

When the ABS home ownership is adjusted to reflect the COTA sample sizes for couples and singles, home ownership based on national averages would be 72.4%. The COTA Australia sample survey result is 78.6% fully owned, with a further 7.8% still paying off a loan.

08. Dwelling

A large proportion of the sample live in a standalone house.

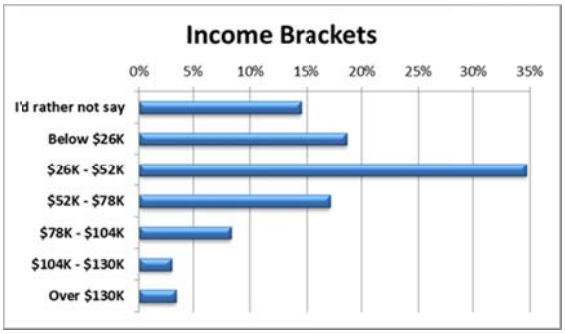
	Dwelling
Standalone house	76.9%
Flat / apartment	11.0%
Townhouse or terrace	12.1%



09. Income (before tax)

32% of the sample reported having income over $1000 per week (equivalent to $52,000 pa), and 6.6% reported having income over $2000 per week (equivalent to $104,000 pa).

	Income per annum
I'd rather not say	14.5%
Below $26K	18.7%
$26K - $52K	34.7%
$52K - $78K	17.2%
$78K - $104K	8.3%
$104K - $130K	3.1%
Over $130K	3.5%



The COTA Australia survey sample has income levels that are significantly higher than the national average.

People living in older households (households where the reference person was aged 65 and over) had the lowest average weekly disposable household income at $660, (annually $34,320) in Australia, with the national average at $918 per week.

The estimated median income of the COTA sample, based on the percentage breakdown of the income bands (as above) is a weekly income of $998 ($51,912 annually). The sample shows income levels 51% greater than the ABS average.

Source: ABS Household Income and Income Distribution, Australia (published 2013)

Given that the age pension equates to around $20,000 per annum, these results indicate that less than 20% of respondents rely on the age pension – understandable given the high educational levels of respondents, but not typical of the seniors community at large.

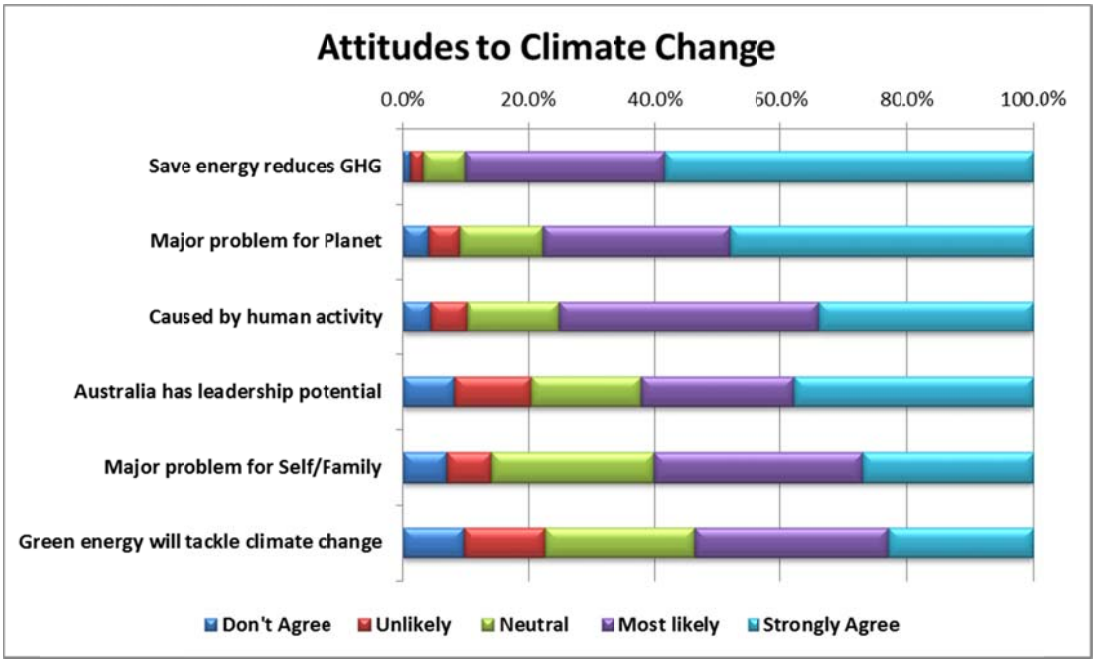
PART B: ATTITUDES TO ENERGY, ENERGY USE, AND ENERGY PURCHASE

10. Attitude to climate change

The majority of the sample are climate change 'believers', with only 10% of the sample considering that climate change is caused by natural circumstances. There is a strong opinion that climate change is anthropogenic, and that it is a major problem for the planet. There is an average level of support for green energy as a solution to climate change. These responses can be compared with Q.12 below, where 78.3% are 'in favour' and willing to support green power.

These results suggest an opportunity to engage with COTA members on addressing climate change issues.

	Don't Agree	Unlikely	Neutral	Most likely	Strongly Agree
Save energy reduces GHG	1.2%	2.0%	6.5%	31.8%	58.6%
Major problem for Planet	3.9%	4.9%	13.4%	29.4%	48.3%
Caused by human activity	4.3%	5.7%	14.8%	41.2%	34.0%
Australia has leadership potential	8.0%	12.4%	17.4%	24.2%	37.9%
Major problem for Self/Family	6.8%	7.4%	25.8%	32.9%	27.2%
Green energy will tackle climate change	9.5%	13.1%	23.7%	30.7%	23.0%



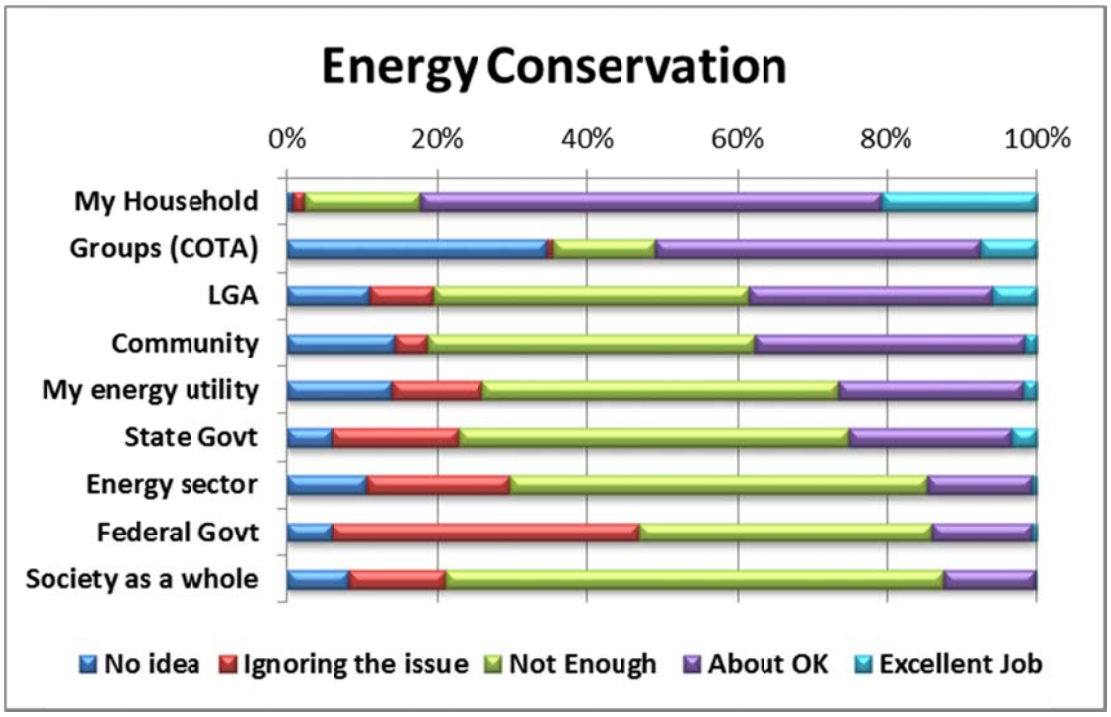
11. Are the following groups supportive enough in helping conserve our energy resources?

There is a strong belief that the COTA sample is already addressing energy conservation at home at the level of "about OK", and to some extent doing an excellent job. However, society as a whole, governments and the energy sector are seen not to be supportive enough in addressing energy conservation.

These results suggest that COTA members would like to see a diverse group of industry, government and other groups do more to help conserve energy resources.

Conserving our energy resources

	No idea	Ignoring the issue	Not enough	About OK	Excellent job
My Household	0.8%	1.6%	15.3%	61.7%	20.7%
Groups (COTA)	34.8%	0.8%	13.6%	43.5%	7.4%
LGA	11.1%	8.2%	42.0%	32.7%	5.9%
Community	14.5%	4.2%	43.5%	36.3%	1.6%
My energy utility	14.0%	12.1%	47.4%	24.7%	1.8%
State Government	5.9%	16.8%	52.1%	21.7%	3.4%
Energy sector	10.6%	19.2%	55.7%	13.9%	0.6%
Federal Government	6.0%	41.0%	39.0%	13.3%	0.7%
Society as a whole	8.4%	12.7%	66.5%	12.2%	0.2%

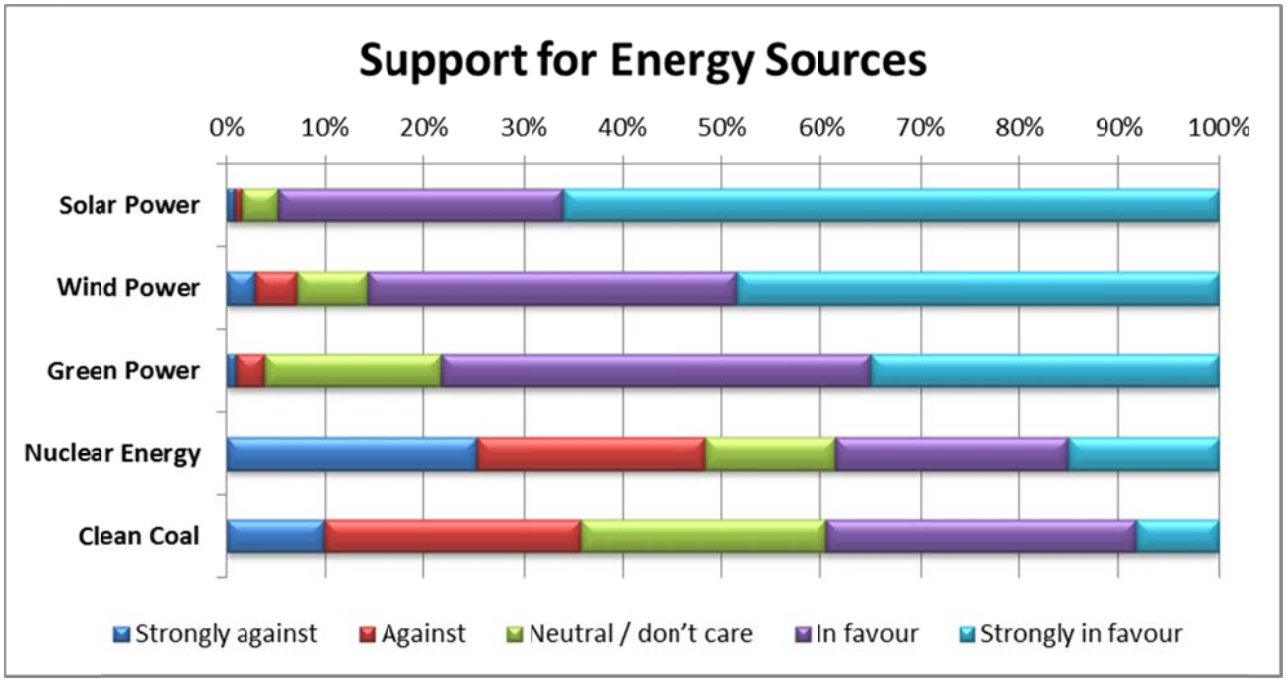


12. What is your level of support for greater use of the following power sources?

The survey responses are consistent with the overall Australian attitudes to energy sources. On average, approximately one third of Australians support nuclear energy as a power source. In this survey, respondents from all jurisdictions have shown a high level of support for wind power, with Tasmania's being the most in favour of wind power. The South Australian sample is more ambivalent, although wind energy sources are better developed in South Australia than in other jurisdictions.

The relatively large number of "neutral" responses in regard to clean coal as against other power sources may suggest that this sample did not fully understand what clean coal was.

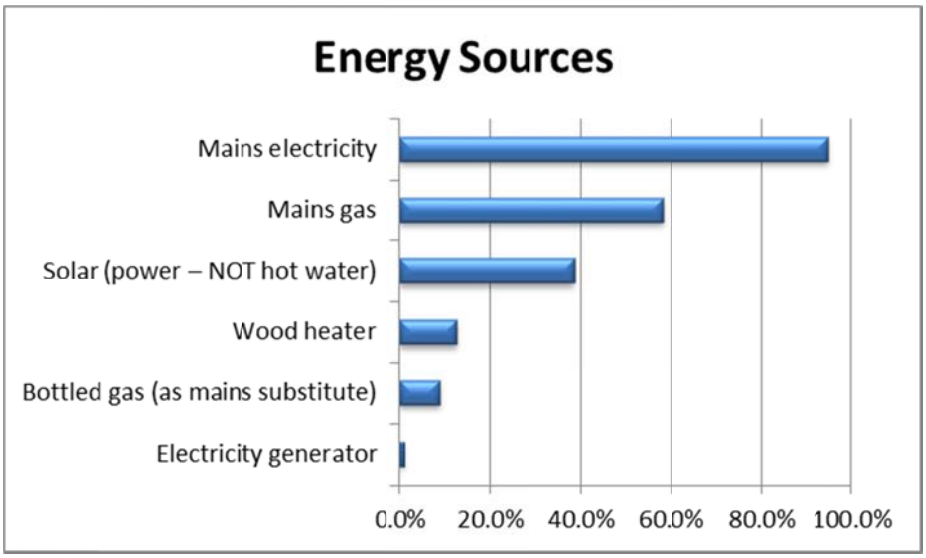
	Strongly against	Against	Neutral / don't care	In favour	Strongly in favour
Solar Power	0.8%	0.7%	3.7%	28.9%	65.9%
Wind Power	3.0%	4.3%	7.1%	37.2%	48.6%
Green Power	0.9%	3.0%	17.8%	43.3%	35.0%
Nuclear Energy	25.2%	23.0%	13.2%	23.3%	15.2%
Clean Coal	9.9%	25.9%	24.7%	31.2%	8.3%



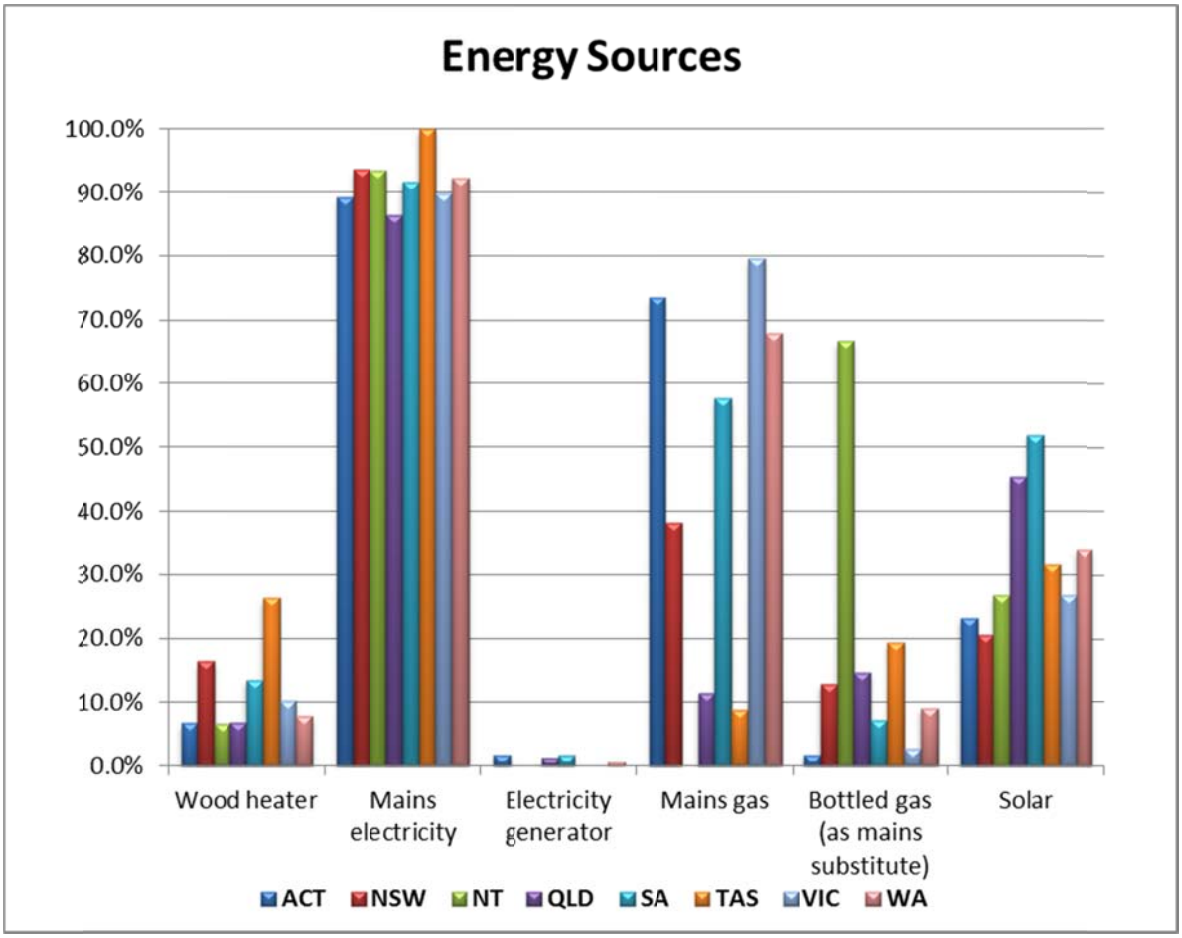
13. What energy sources does your household use?

There are now more than one million Australia homes with rooftop solar power, which is approximately 12% of the Australian housing stock. Within the owner occupied housing sector, the average is closer to 15%. In this survey, 38.4% of the sample has solar. This is 2.6 times the Australian average, again reinforcing that the data has been generated by an engaged energy consumer group with the means and the willingness and interest to invest in energy solutions. The high level of solar would also be supported by data in Q.11 above, which suggested that 82% of households believe that they are good practitioners of energy management.

	Energy sources used in households
Electricity generator	1.0%
Bottled gas (as mains substitute)	8.8%
Wood heater	12.5%
Solar (power - NOT hot water)	38.4%
Mains gas	58.0%
Mains electricity	94.8%



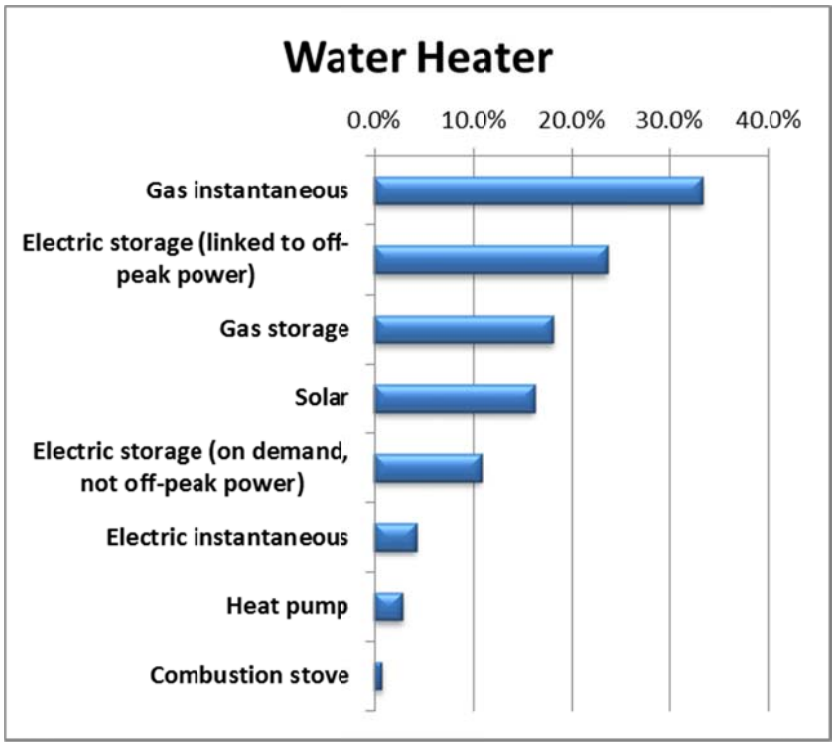
The graph below shows energy sources used by jurisdiction. It illustrates jurisdictional differences in particular in the use of mains and bottled gas, solar PV, and wood heating.



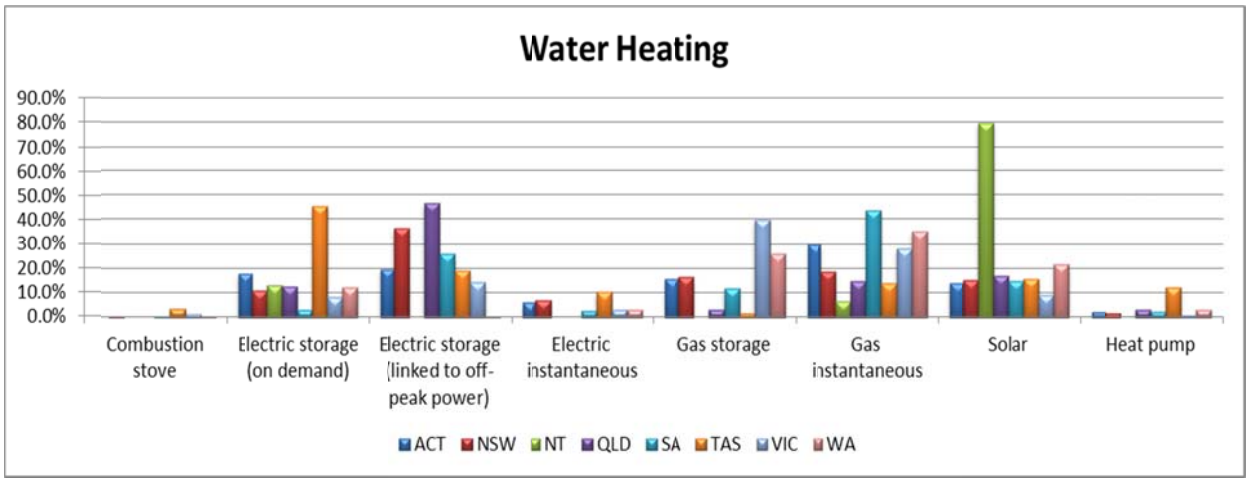
14. What type of water heater does your household use?

The sample uses a range of fuels for water heating, with gas being used overall more than electricity.

	Water Heater
Combustion stove	0.8%
Heat pump	2.8%
Electric instantaneous	4.2%
Electric storage (on demand, not off-peak power)	10.7%
Solar	16.2%
Gas storage	18.1%
Electric storage (linked to off-peak power)	23.5%
Gas instantaneous	33.3%



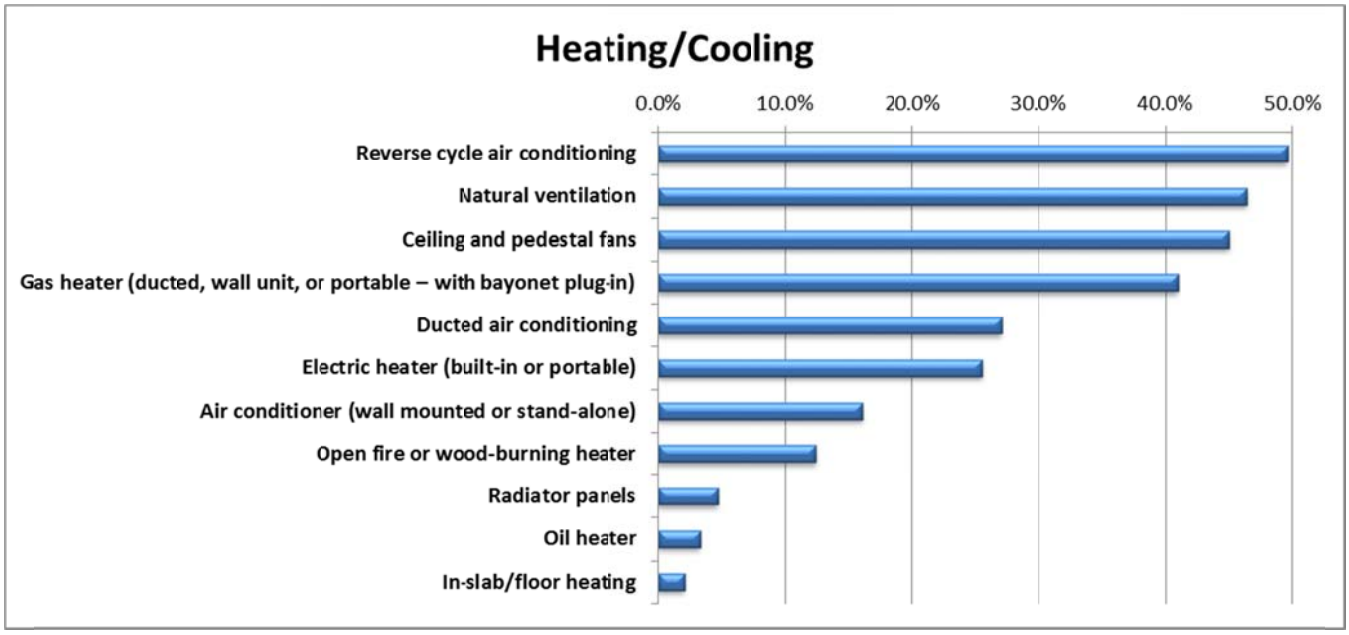
The fuels that were reported to be used for water heating by jurisdiction are consistent with the energy sources in use by jurisdiction that were reported in the previous survey question.



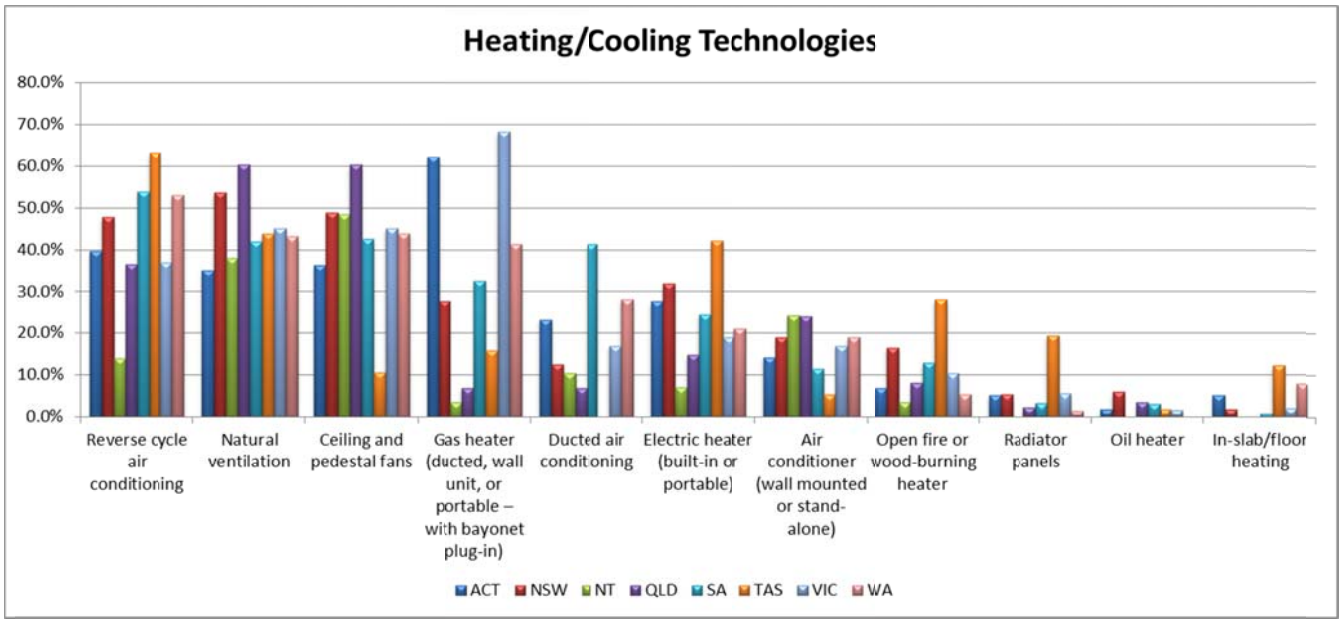
15. Which of the following heating and cooling technologies are used in your household

The majority of the sample has some level of investment in air conditioning technology. 93.1% have a level of air conditioning in their homes, while the national average is 61% (ABS census).

	Heating / Cooling
Reverse cycle air conditioning	49.6%
Natural ventilation	46.5%
Ceiling and pedestal fans	45.1%
Gas heater (ducted, wall unit, or portable - with bayonet plug-in)	41.0%
Ducted air conditioning	27.1%
Electric heater (built-in or portable)	25.5%
Air conditioner (wall mounted or stand-alone)	16.1%
Open fire or wood-burning heater	12.4%
Radiator panels	4.7%
Oil heater	3.3%
In-slab/floor heating	2.1%



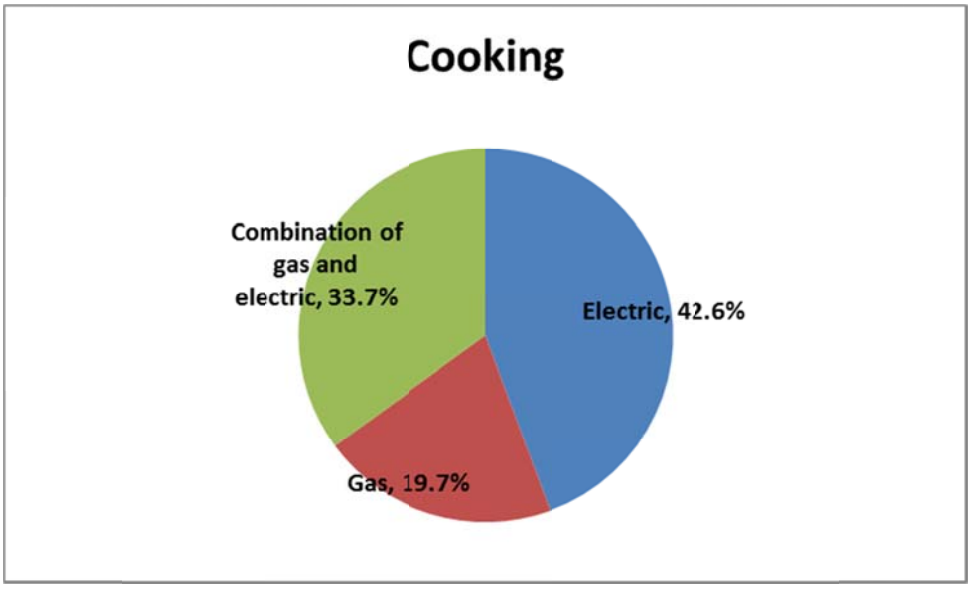
The graph below shows heating / cooling technologies is use by jurisdiction.



16. What fuel source do you use for cooking?

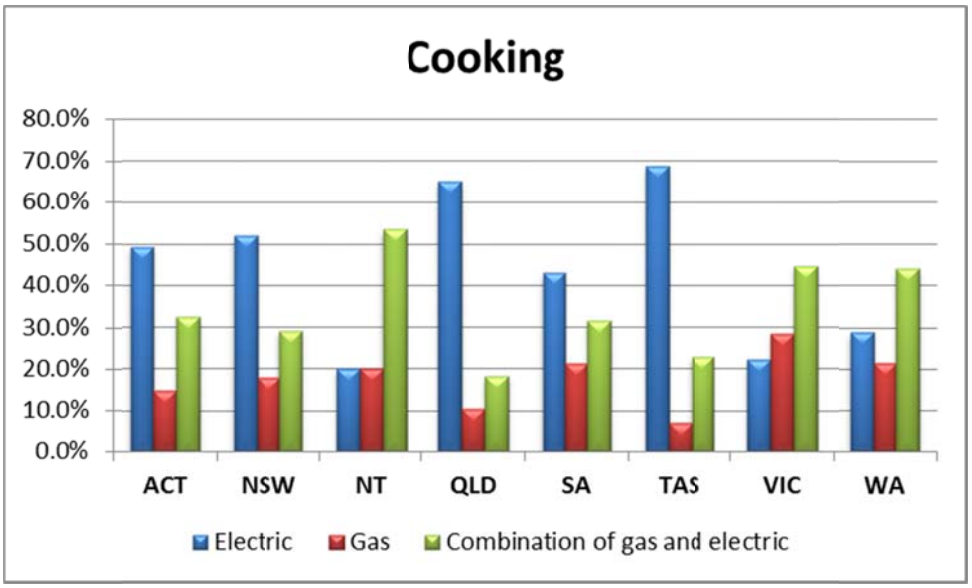
Both electric and gas are used for cooking, on their own and in combination. Where only one energy source is used for cooking, it is more likely to be electric than gas.

Electric cooking	42.6%
Gas cooking	19.7%
Combination of gas and electric	33.7%



There are jurisdictional differences, matching the previous responses on energy sources that are used by jurisdiction.

	Electric cooking	Gas cooking	Combination of gas and electric
ACT	51.2%	15.3%	33.5%
NSW	52.7%	18.0%	29.3%
NT	28.6%	19.0%	52.4%
QLD	69.5%	11.0%	19.5%
SA	44.9%	22.3%	32.8%
TAS	69.6%	7.1%	23.2%
VIC	23.2%	29.7%	47.0%
WA	30.6%	22.9%	46.5%

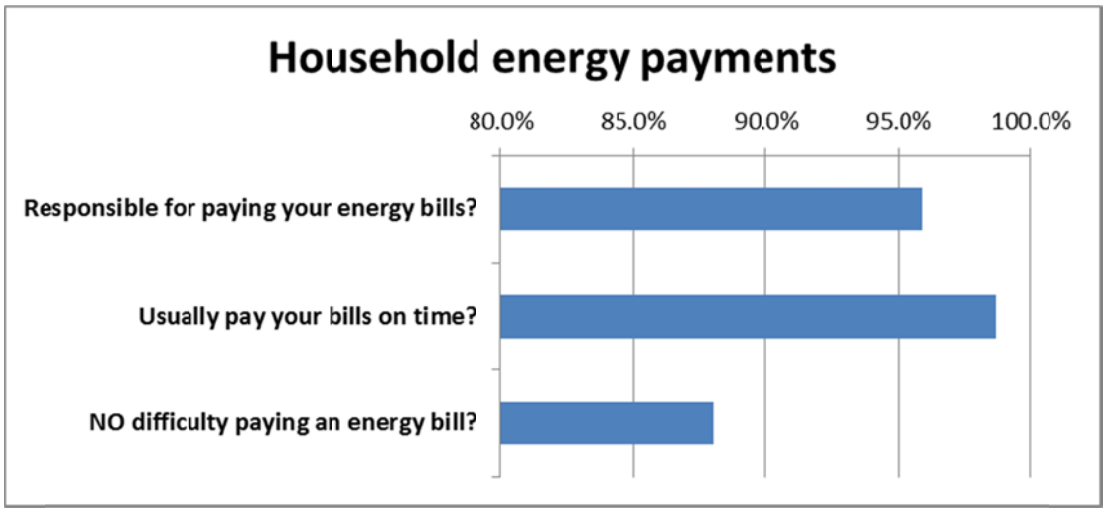


17. Household energy payments

Given the overall affluence of the sample, it is not surprising that the respondents have little difficulty paying their energy bills. We also were told in workshops where the survey results were presented that older Australians pay bills on time as a matter of pride and duty. They prioritise bill payments, even if they have to forego other requirements, more so than younger Australians. Energy bills are especially prioritised for payment due to the fear of disconnection if the bill is not paid on time.

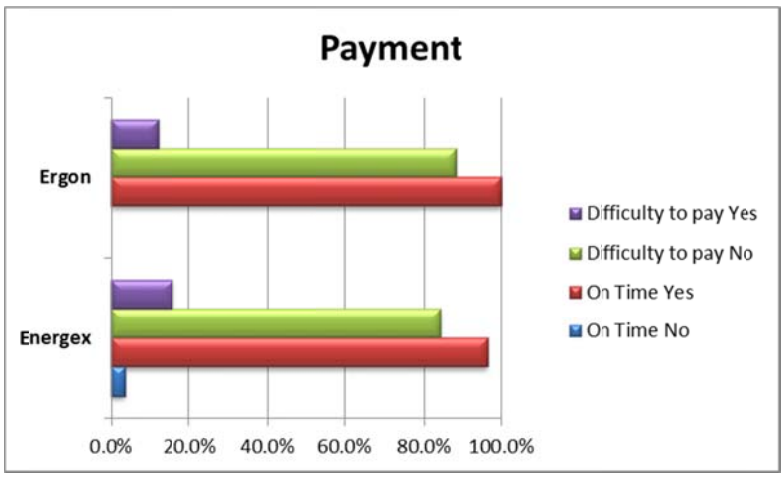
It is though worth noting that some 12% of the sample respondents have difficulty paying an energy bill, which equates to about 1 in 8 households in the survey having difficulty paying energy bills.

	No	Yes
Responsible for paying your energy bills?	4.1%	95.9%
Usually pay your bills on time?	1.3%	98.7%
NO difficulty paying an energy bill?	12.0%	88.0%



We did not ask in the survey whether paying the bill on time was tied to getting a discount from the retailer. We tried to test whether this was the case by comparing in the Queensland area whether there was a difference in response between consumers in the Energex area who may be on a market contract where a discount is available for paying bills on time, as against the Ergon Energy area where no such market contracts and discounts are available in the mass market in the absence of effective retail competition in this sector.

The graph below does not show this to be a significant differentiator. Sample respondents still paid their energy bills on time in the Ergon Energy area in the absence of pay-on-time discounts being available.



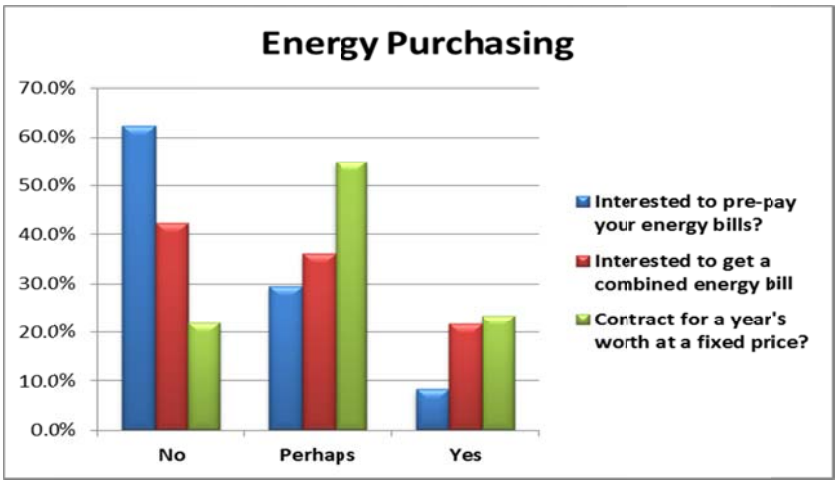
18. Household energy bill preferences

Nearly two-thirds of respondents are not interested in pre-paying for their energy. The respondents are largely ambivalent about getting a combined electricity and gas bill. They may 'perhaps' be interested in contracting for a year's worth of energy at a fixed price.

It could be interpreted from the results below that the sample

- Did not see benefit in pre-paying their energy bills, though the 30% who said 'perhaps' maybe had an open mind;
- Did not see benefit in getting a combined energy bill, but maybe the 36% saying 'perhaps' were indicating they were open to the idea, if they could see benefit'
- Had an open mind regarding whether they would contract for a year's worth of energy at a fixed price. Maybe they were saying 'tell me more' – if the price and terms and conditions were right, they could be interested.

	No	Perhaps	Yes
Interested to pre-pay your energy bills?	62.3%	29.5%	8.2%
Interested to get a combined energy bill	42.3%	36.1%	21.6%
Contract for a year's worth at a fixed price?	21.8%	54.8%	23.3%

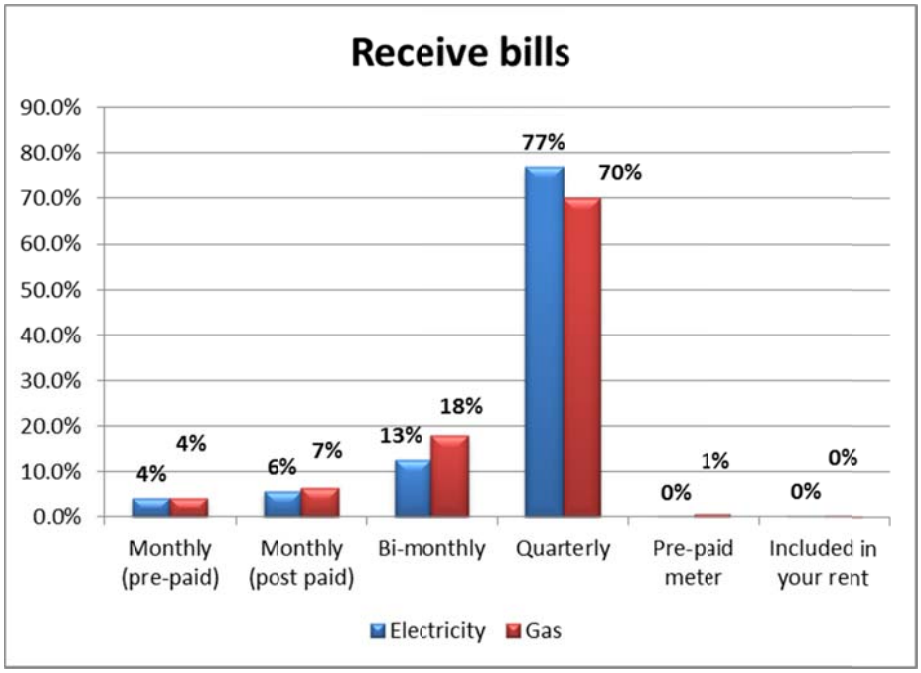


19. How frequently do you currently receive and pay your energy bills?

The purchase and payment of energy remains a consistent service, often with quarterly payment in arrears. Monthly billing is only 10% of the sample, and the frequency of bi-monthly billing is higher than monthly.

In the free text question at the end of the survey, a respondent noted that the ACT has an even-pay system where customers pay a certain amount per fortnight. This response option could usefully have been included in this question.

	Monthly (pre-paid)	Monthly (post paid)	Bi-monthly	Quarterly	Pre-paid meter	Included in your rent
Electricity	4.2%	5.8%	12.7%	77.0%	0.1%	0.2%
Gas	4.1%	6.6%	18.0%	70.3%	0.7%	0.4%



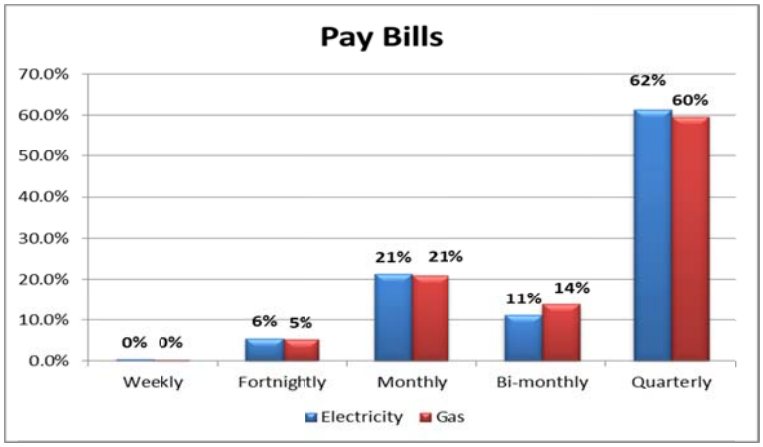
20. How frequently would you like to pay your energy bills?

When the following data is considered in conjunction with Q.19, there is residual potential to move to monthly billing.

- In Q.19, 10% pay for their energy monthly, while 77% (electricity) and 70% (gas) pay quarterly.
- In Q.20, 21% would prefer to pay monthly, while the number that would prefer to pay quarterly has reduced to around 60%.

While a clear majority would still prefer to pay quarterly, the survey suggests that there is a further 11% who would switch to monthly billing, if offered. In general, there is a shift to a preference for more frequent payment from Q.19 to Q.20. This suggests that there is a trend within the sample for some consumers to prefer to pay bills more frequently than currently.

	Weekly	Fortnightly	Monthly	Bi-monthly	Quarterly
Electricity	0.5%	5.5%	21.3%	11.2%	61.5%
Gas	0.4%	5.2%	21.0%	13.8%	59.6%



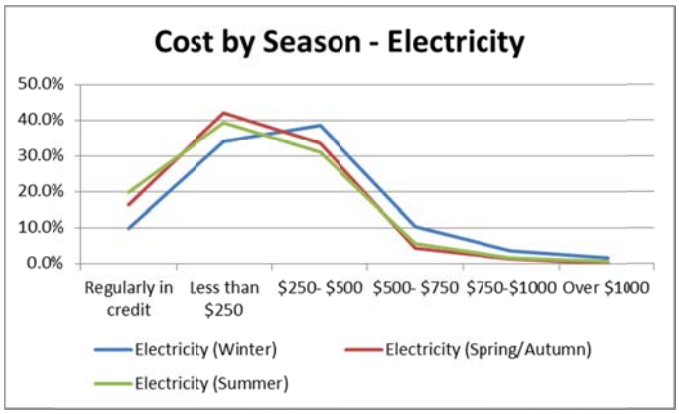
21. What is the average amount of each energy bill you receive?

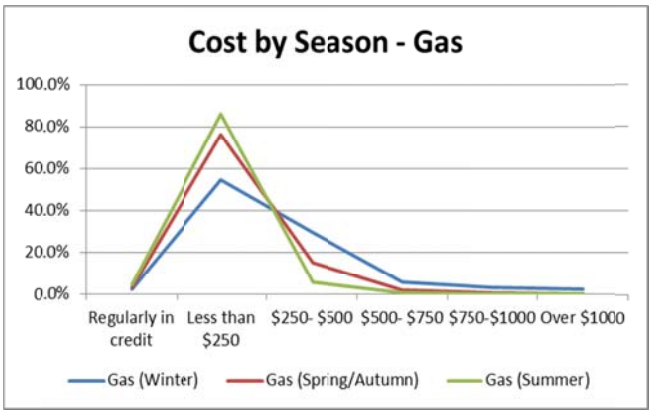
Energy bills in the sample are relatively low compared to national and jurisdictional averages. A comment in the free text suggested that the lowest band of 'less than $250' should have been sub-divided.

There are many factors that are likely to contribute to the relatively low bills, including smaller households, high take up of solar PV in the case of electricity bills, and efficiency and awareness of energy use.

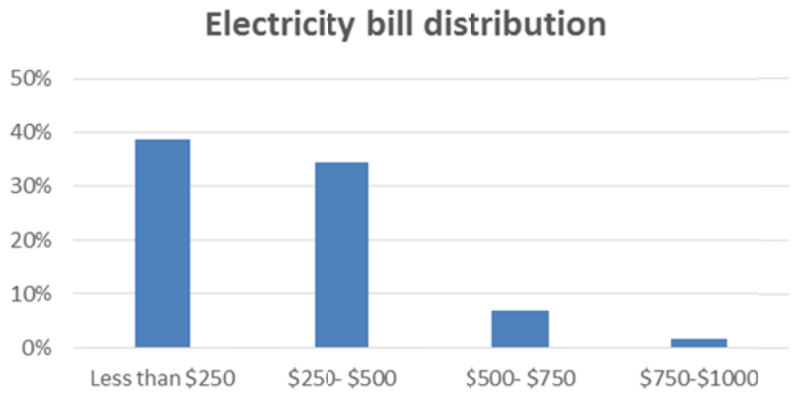
Electricity bills may be regularly in credit due to feed-in tariffs with solar PV. Bills for both fuels may also be in credit due to pre-payments, often through Centrelink.

	Don't know	Regularly in credit	Less than $250	$250-$500	$500-$750	$750-$1000	Over $1000
Electricity (Winter)	1.5%	10.0%	34.2%	38.6%	10.5%	3.7%	1.6%
Electricity (Spring/Autumn)	1.9%	16.4%	42.1%	33.6%	4.3%	1.5%	0.2%
Electricity (Summer)	1.6%	20.0%	39.5%	31.1%	5.6%	1.7%	0.6%
Gas (Winter)	2.7%	2.3%	54.7%	29.4%	5.8%	3.0%	2.1%
Gas (Spring/Autumn)	3.1%	3.2%	76.4%	15.0%	1.8%	0.5%	0.1%
Gas (Summer)	3.1%	4.2%	86.2%	5.8%	0.6%	0.1%	0.0%





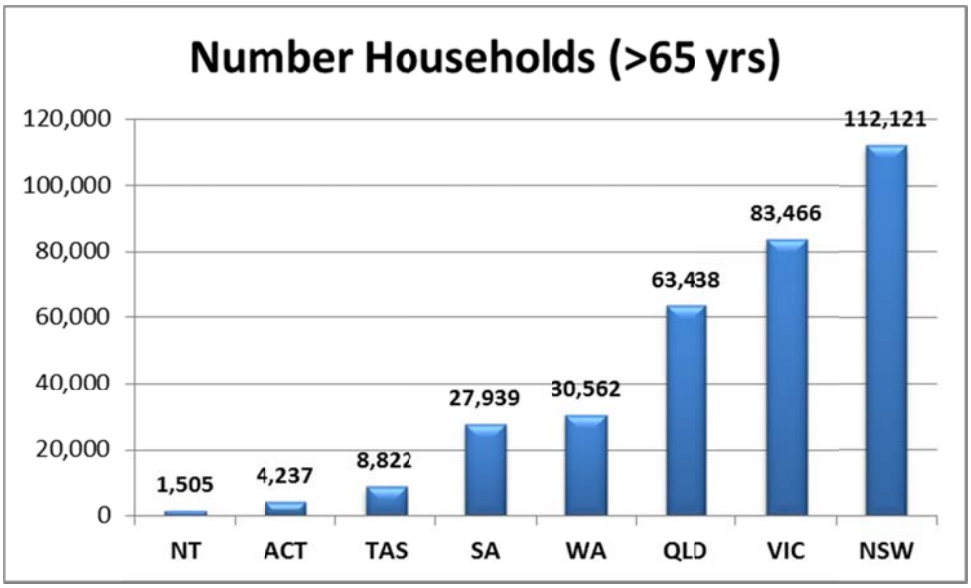
The graph below is indicative of the survey results for electricity use, illustrating an asymmetric distribution of bill sizes, weighted towards smaller bills, as against the more usual normal distribution bell curve that is seen in the general population.



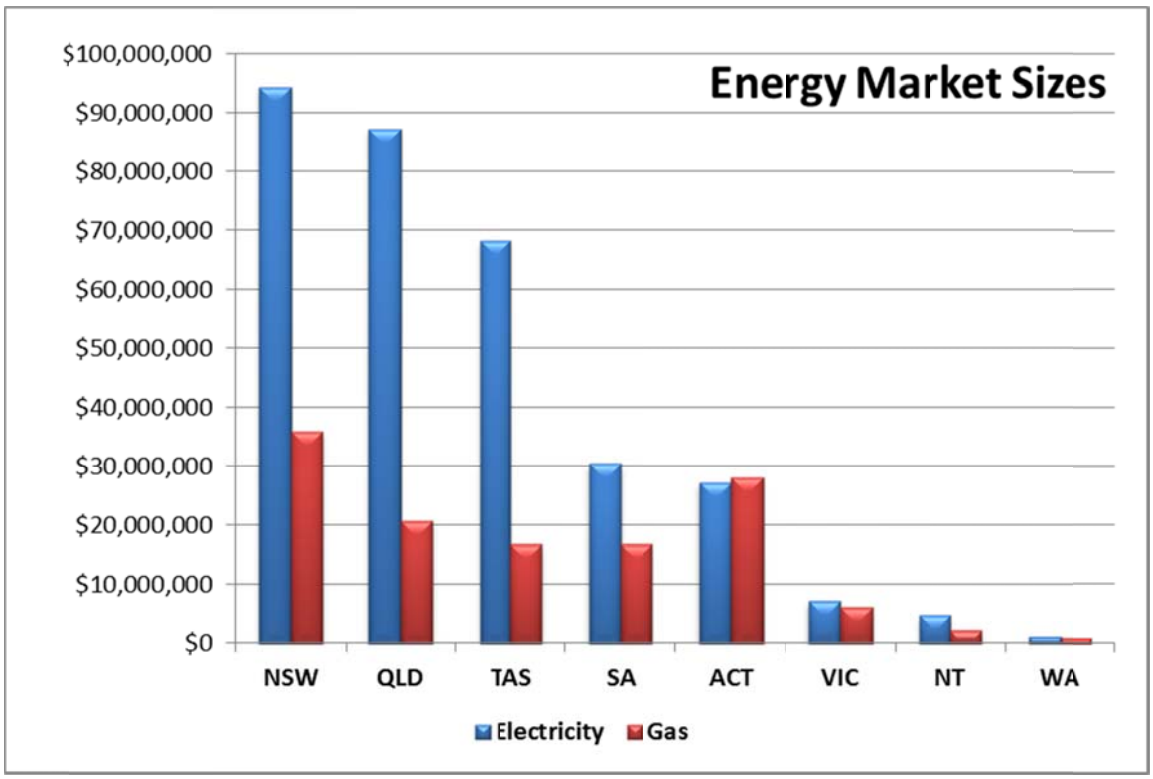
21.a National market size

Using the respondent data as a proxy for each market size, and applying these ratios to current ABS population data, we have sought to quantify the energy markets for each jurisdiction for Australians over the age of 65. The proportion of household types was

applied to the aged population sizes to determine the number of dwellings per jurisdiction occupied by Australians over the age of 65 years.



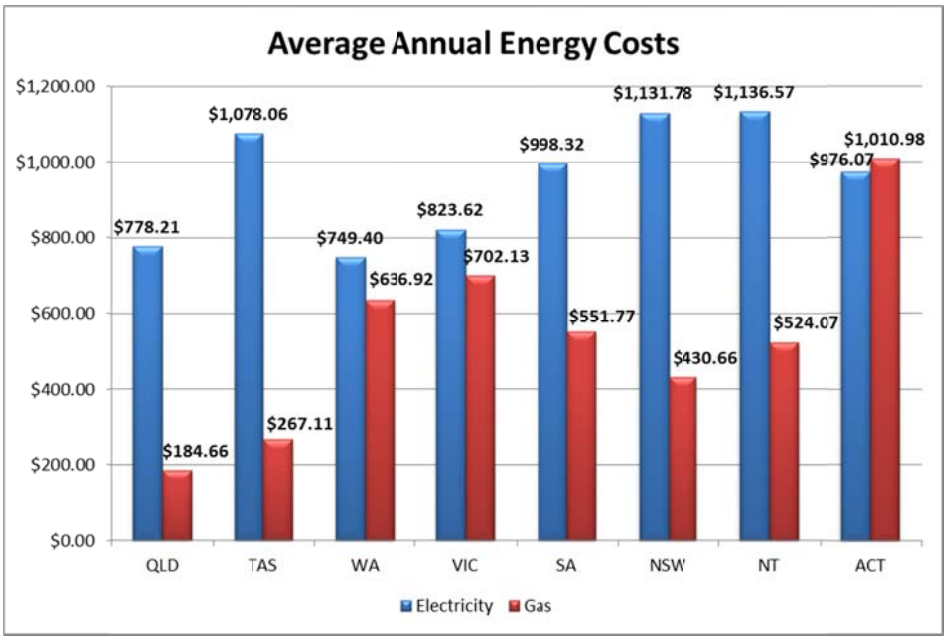
The total energy market for Australians over the age of 65, both electricity and gas, is estimated to be $449m, with electricity comprising 71% and gas 29%.

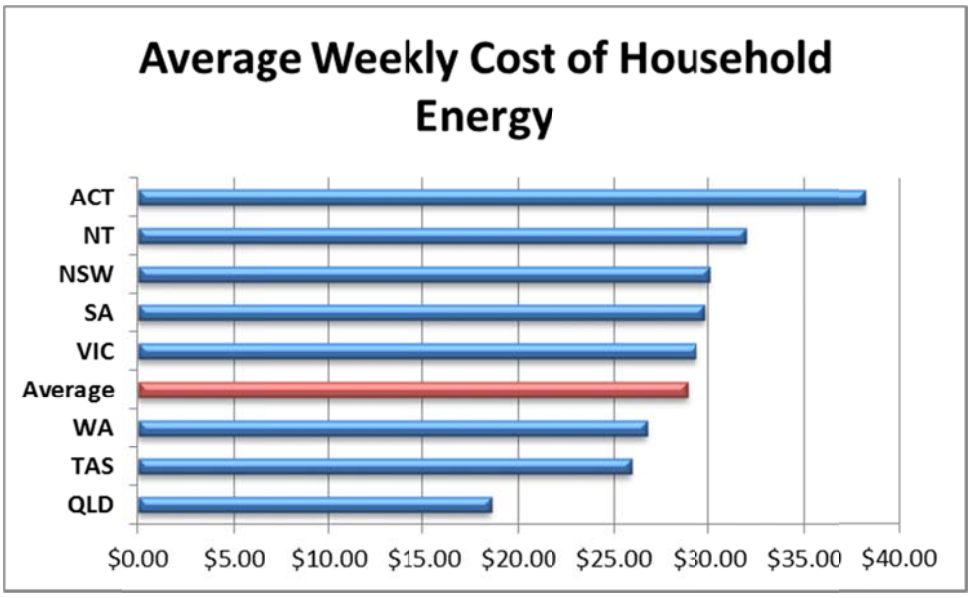


There is a significant spread in the cost of household energy for Australians aged over 65 across the jurisdictions, with residents in Queensland having the lowest annual costs, and the ACT having the highest. Analysis of the survey responses suggests that the average weekly cost of energy per respondent household is $28.80, which is about 25% (or about $10) less than recent ABS data which states that the average weekly cost of household energy in Australia is $39.

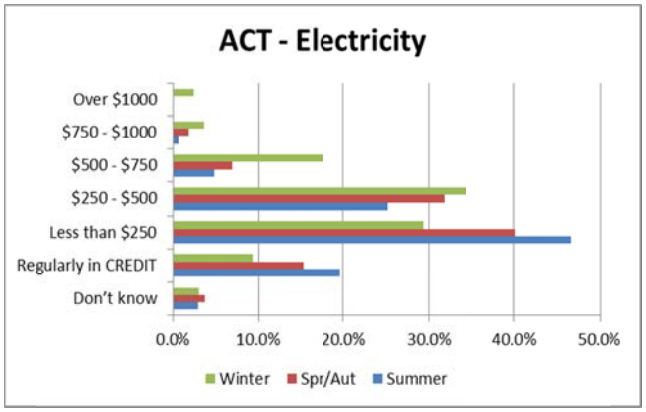
Source: 4671.0 - Household Energy Consumption Survey, User Guide, Australia, 2012

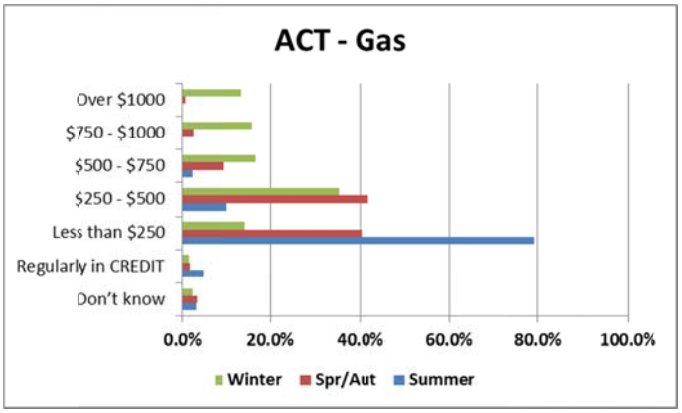
The following graphs show the average energy cost per jurisdiction, based on the survey data.

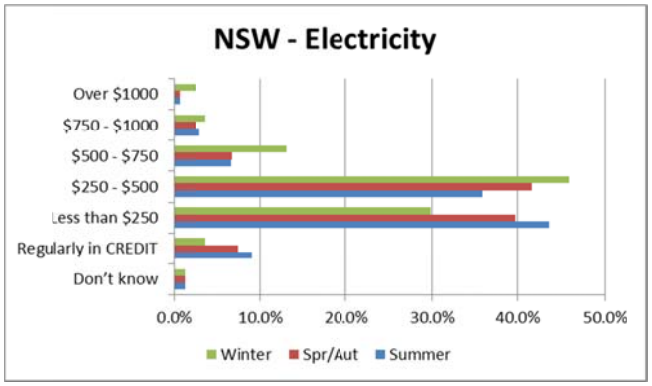


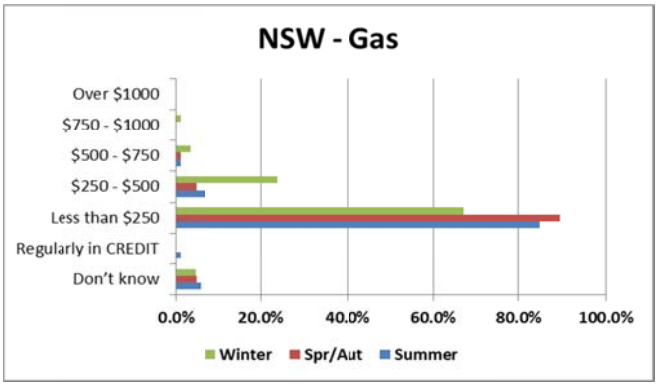


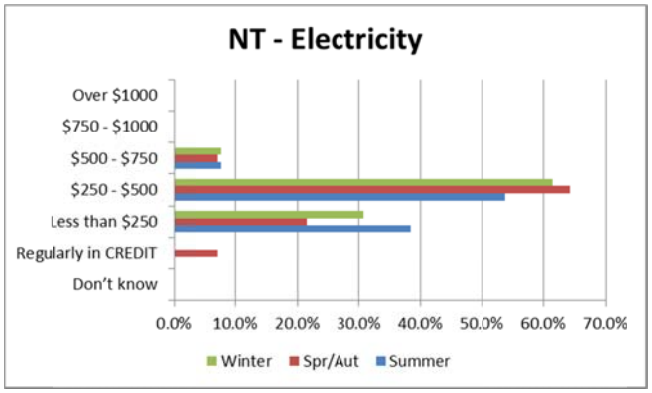
21.b Average energy bills by jurisdiction

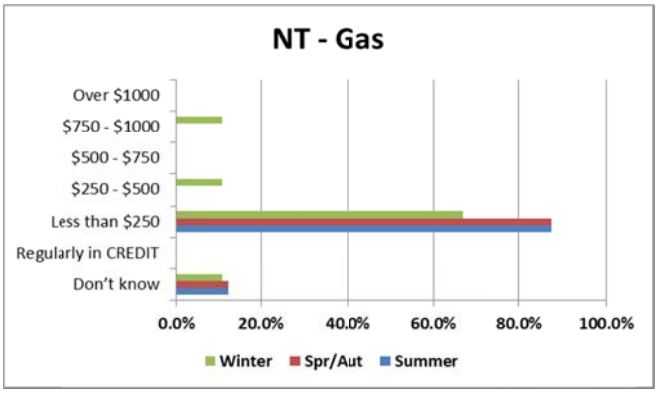


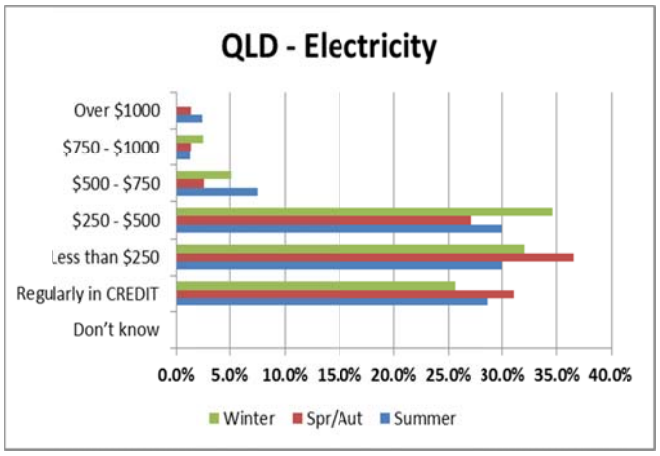


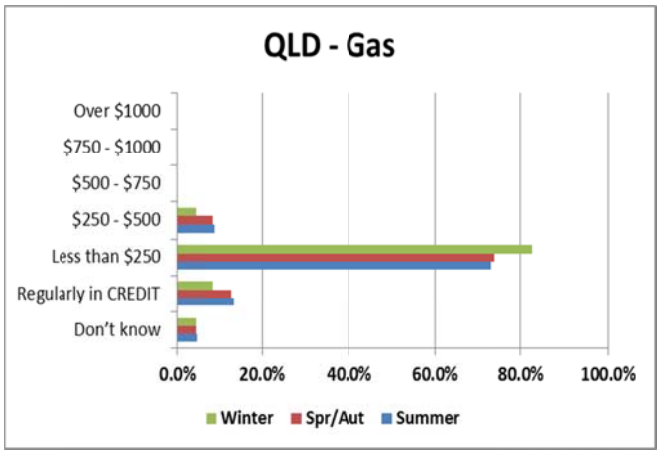


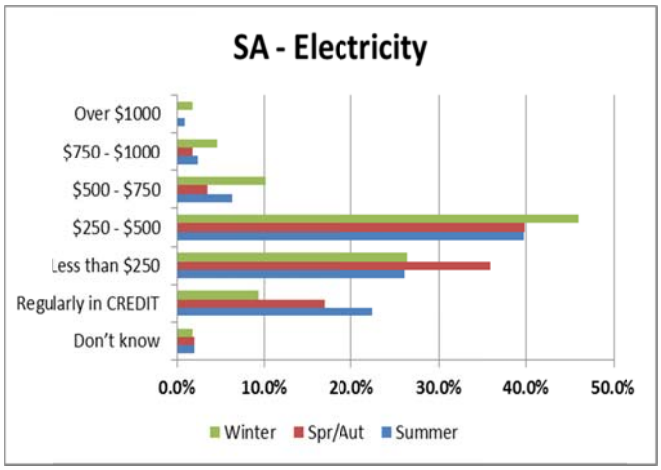


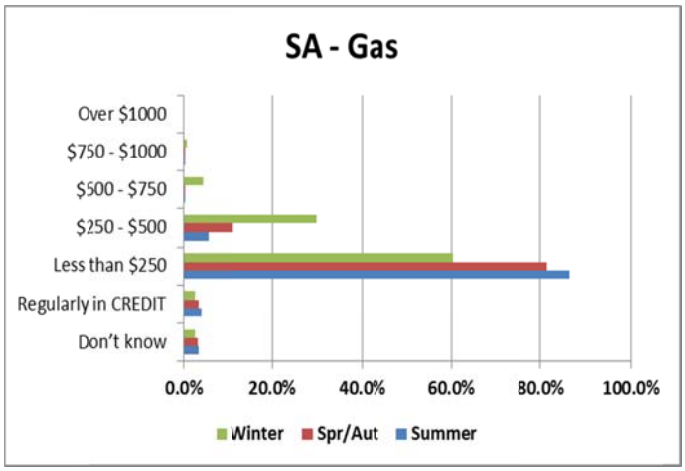


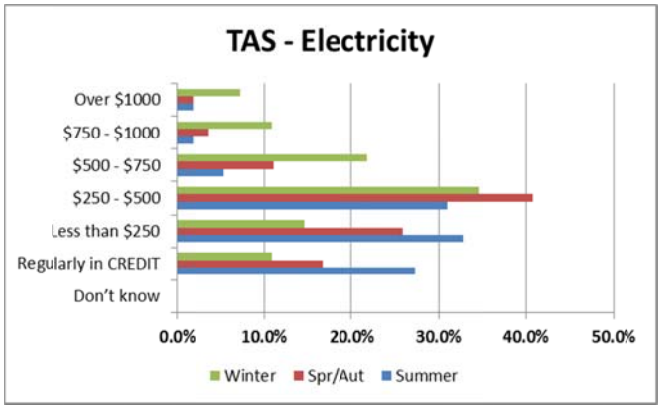


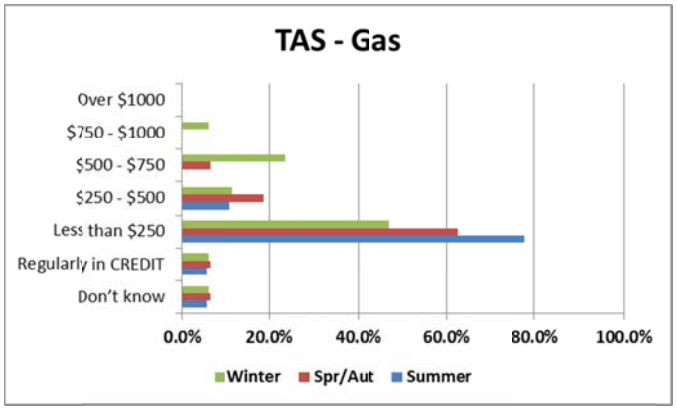


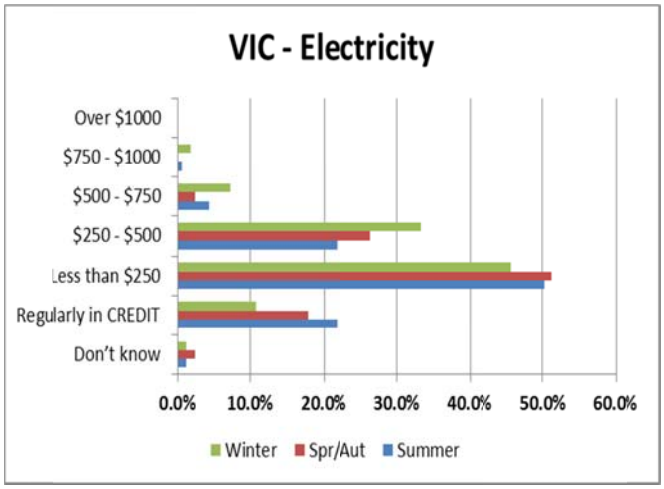


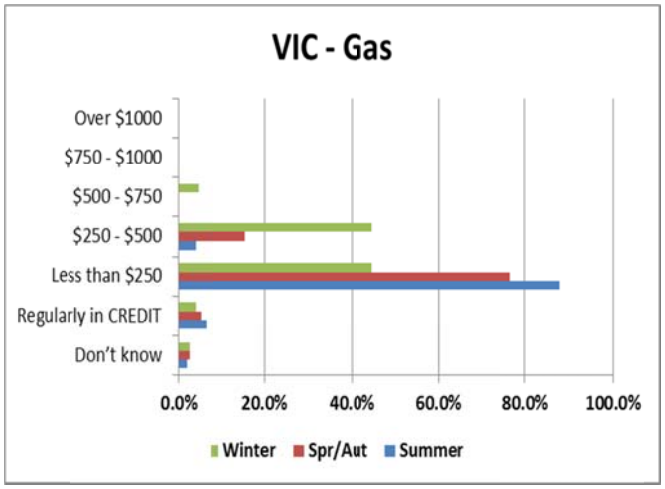

SA - Electricity
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 10.0% 20.0% 30.0% 40.0% 50.0%
Winter Spr/Aut Summer

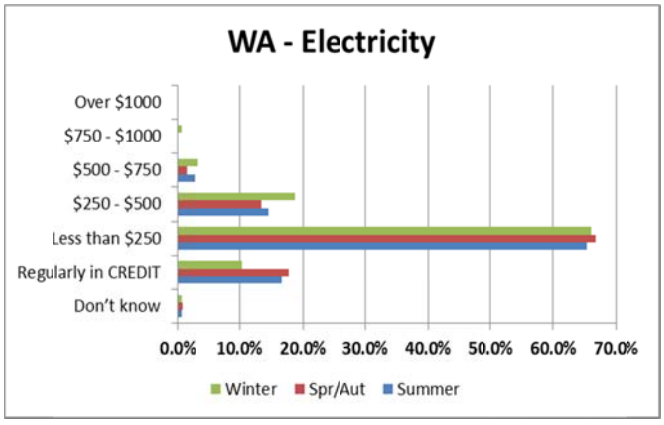

SA - Gas
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 20.0% 40.0% 60.0% 80.0% 100.0%
Winter Spr/Aut Summer

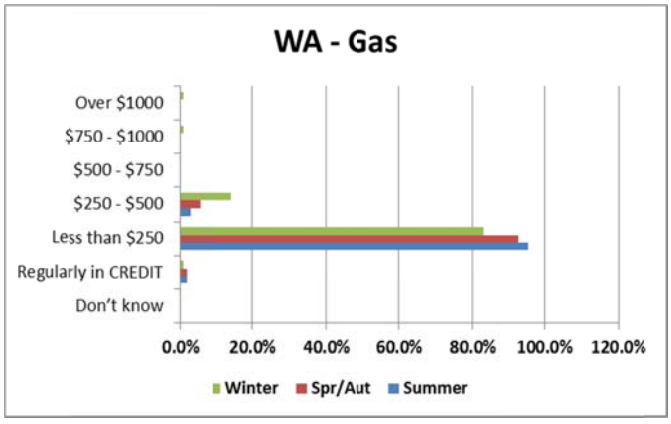

TAS - Electricity
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 10.0% 20.0% 30.0% 40.0% 50.0%
Winter Spr/Aut Summer


TAS - Gas
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 20.0% 40.0% 60.0% 80.0% 100.0%
Winter Spr/Aut Summer


VIC - Electricity
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0%
Winter Spr/Aut Summer


VIC - Gas
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 20.0% 40.0% 60.0% 80.0% 100.0%
Winter Spr/Aut Summer


WA - Electricity
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 10.0% 20.0% 30.0% 40.0% 50.0% 60.0% 70.0%
Winter Spr/Aut Summer


WA - Gas
Over $1000
$750 - $1000
$500 - $750
$250 - $500
Less than $250
Regularly in CREDIT
Don't know
0.0% 20.0% 40.0% 60.0% 80.0% 100.0% 120.0%
Winter Spr/Aut Summer

22. Participation in payment assistance schemes

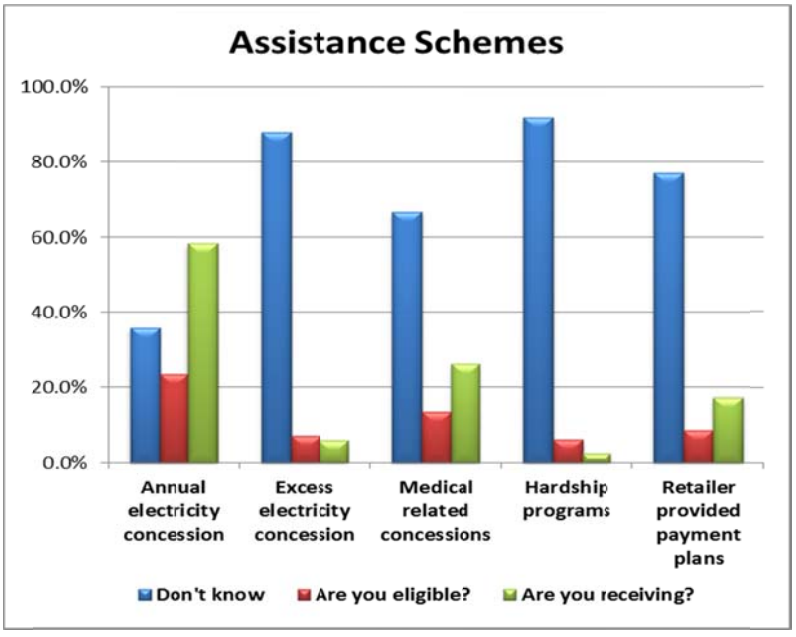
Large numbers of respondents did not answer this question. 79% of respondents answered the question in relation to annual electricity concessions, and on average 39% provided answers regarding the other payment assistance schemes that were mentioned in the question.

Other than the Annual Electricity concession, there is a high level of ignorance in and around payment assistance schemes.

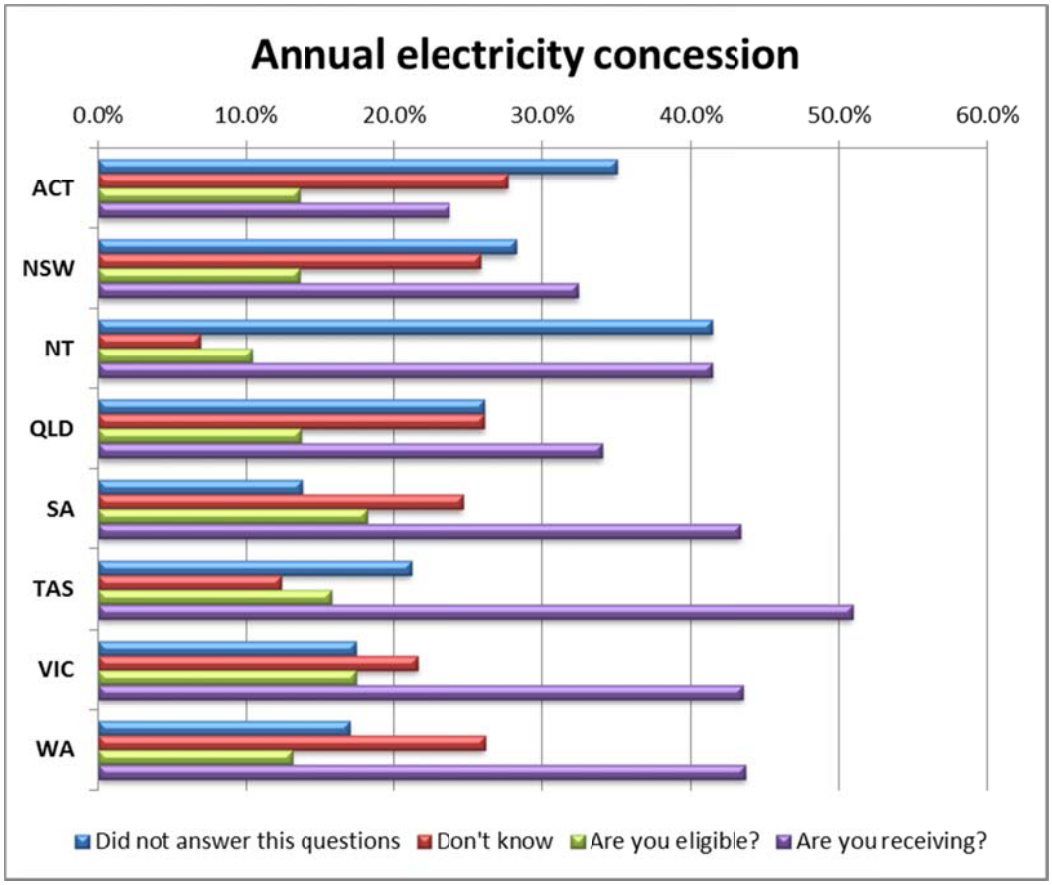
The wording for this question in the survey was purposely imprecise to cover schemes with different names in different jurisdictions. It is possible that this confused respondents such that they did not recognise the actual schemes in their jurisdictions. More precise wording by jurisdiction may have elicited more positive responses.

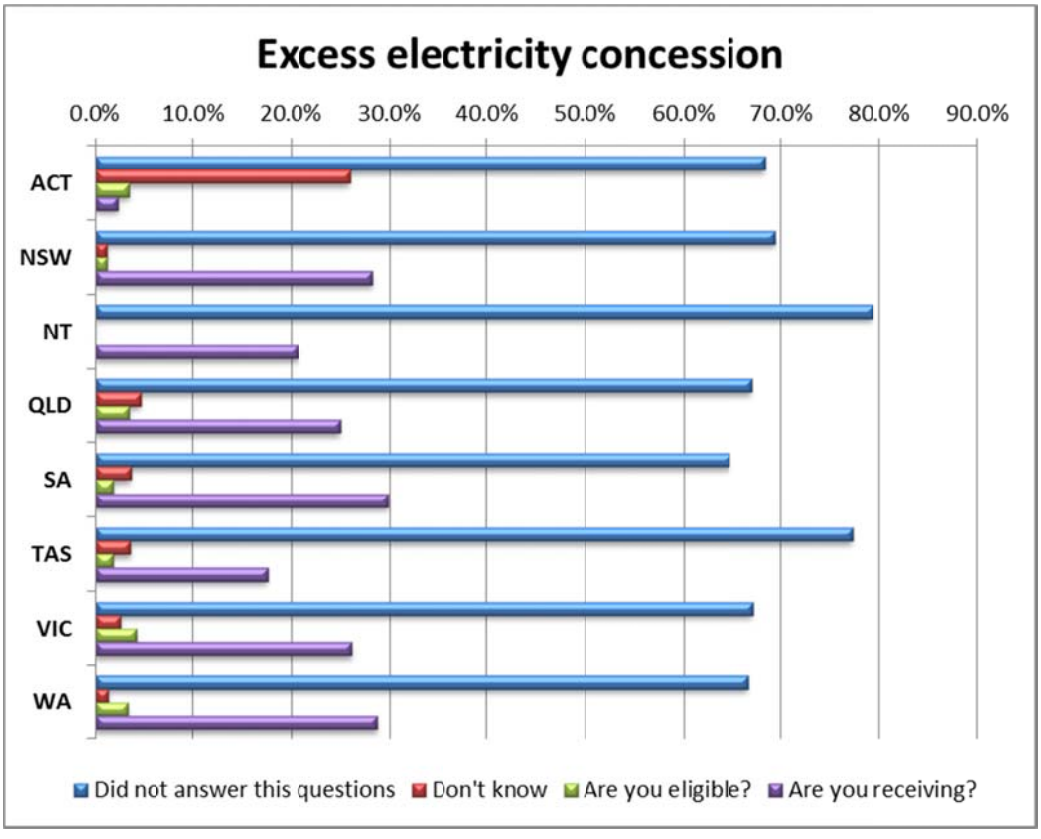
The very low take up of hardship programs is consistent with information provided at workshops at which the results of the survey were presented. We heard that older Australians are proud and do not readily seek assistance. As discussed above, in Q.17, they pay their energy bills on time as a matter of pride, as well as fear of disconnection, and would rather spend less in other areas in order to budget.

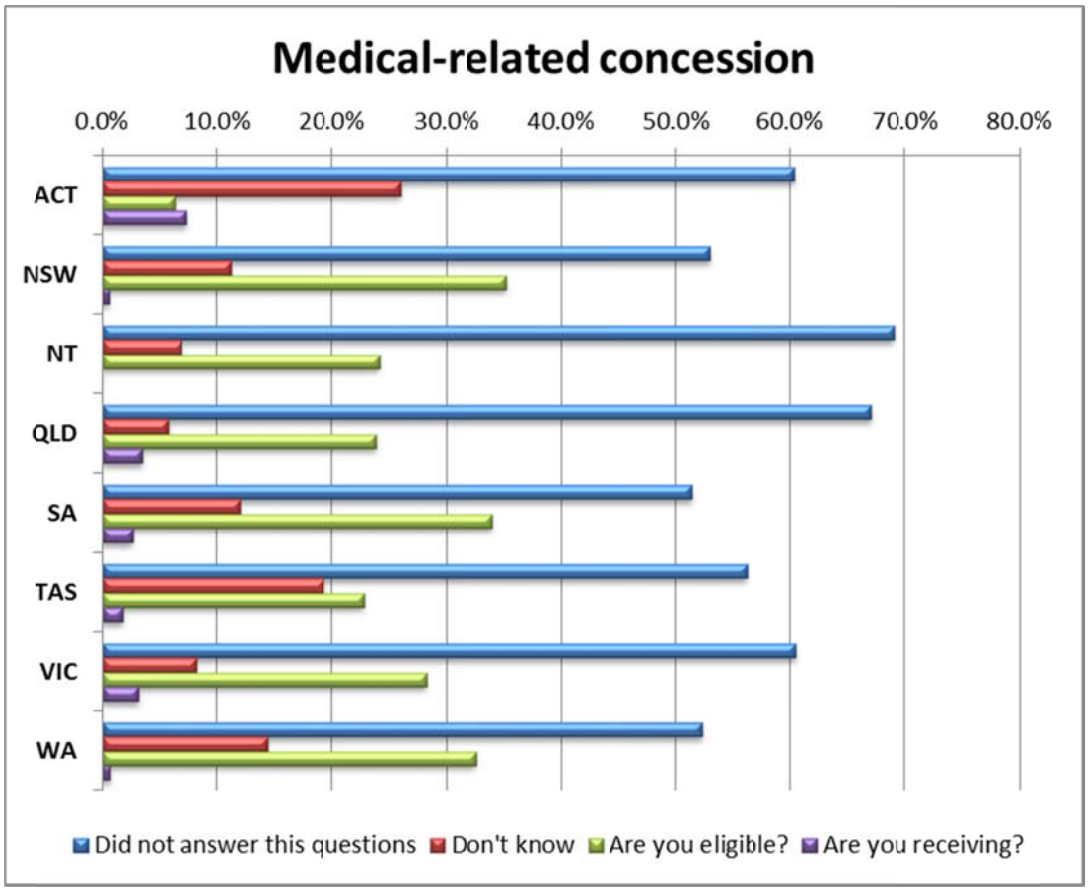
	Don't know	Are you eligible?	Are you receiving?	Percentage answered
Annual electricity concession	36.0%	23.5%	58.5%	**79.1%**
Excess electricity concession	88.00%	7.30%	6.00%	**39.50%**
Medical related concessions	66.70%	13.60%	26.20%	**43.90%**
Hardship programs	92.00%	6.30%	2.40%	**33.90%**
Retailer provided payment plans	77.10%	8.60%	17.40%	**38.40%**

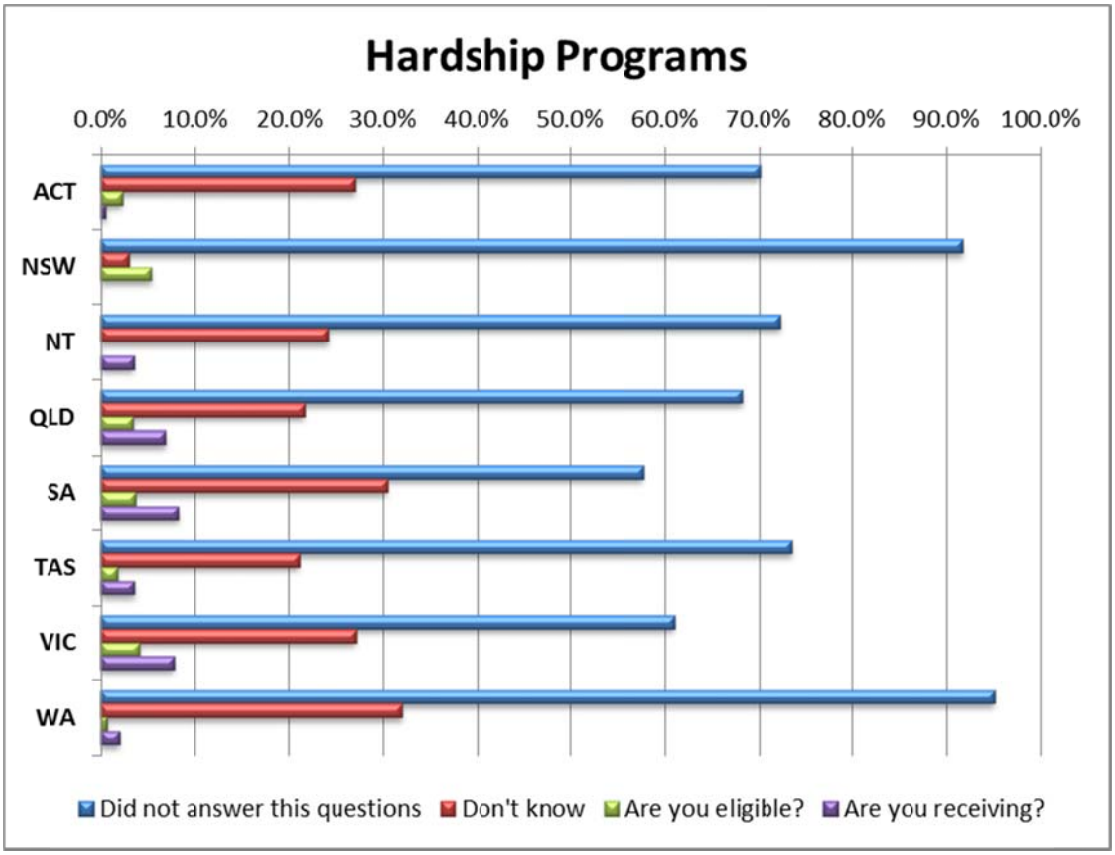


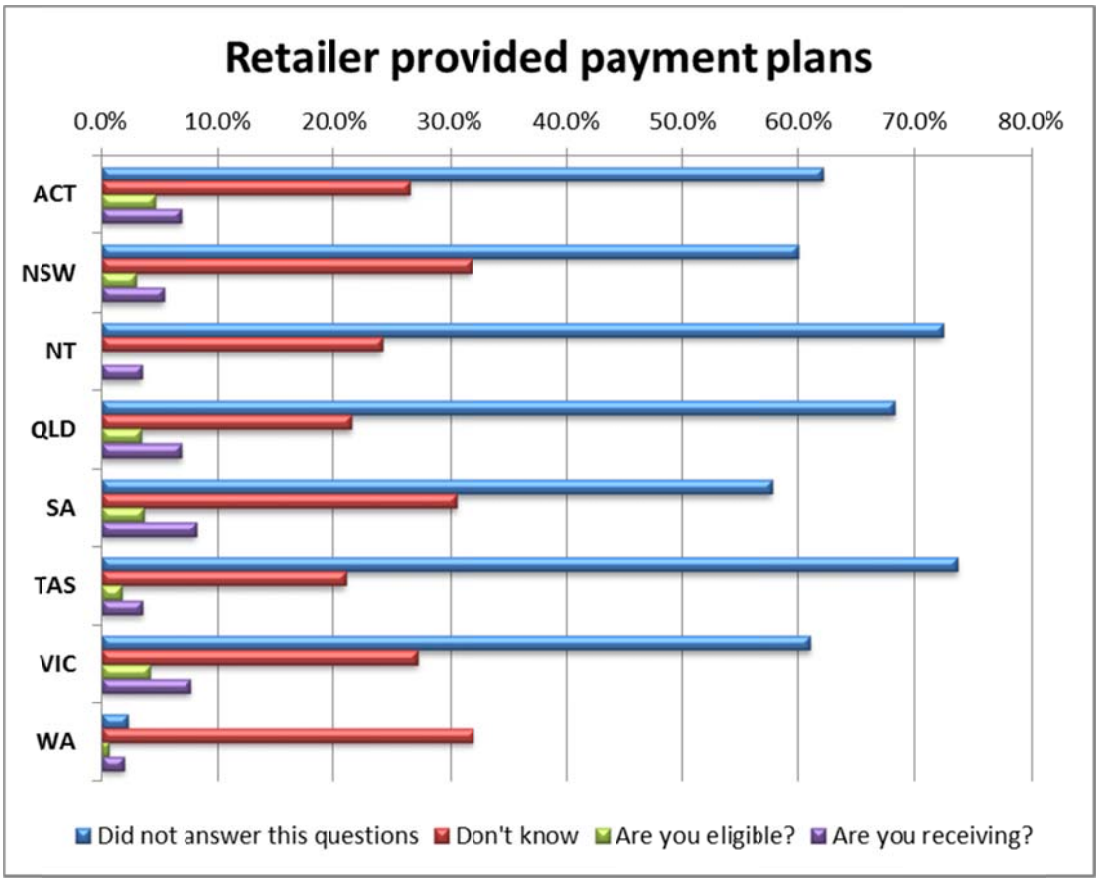
Below we present the results by jurisdiction.






Medical-related concession
0.0%
10.0%
20.0%
30.0%
40.0%
50.0%
60.0%
70.0%
80.0%
ACT
NSW
NT
QLD
SA
TAS
VIC
WA
Did not answer this questions
Don't know
Are you eligible?
Are you receiving?


Hardship Programs
0.0%
10.0%
20.0%
30.0%
40.0%
50.0%
60.0%
70.0%
80.0%
90.0%
100.0%
ACT
NSW
NT
QLD
SA
TAS
VIC
WA
Did not answer this questions
Don't know
Are you eligible?
Are you receiving?

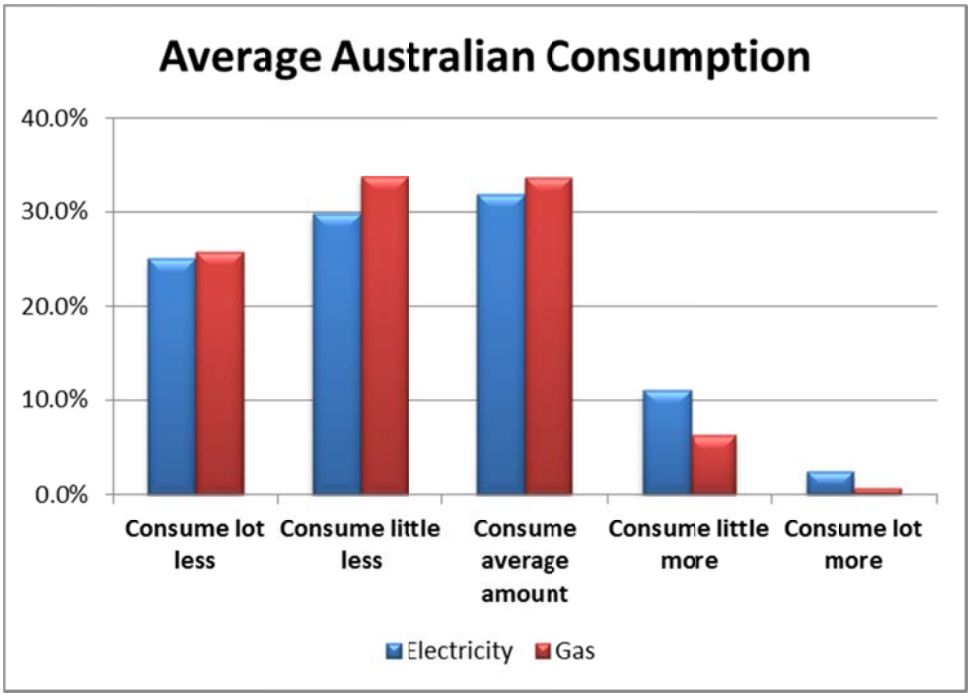

Retailer provided payment plans
0.0%
10.0%
20.0%
30.0%
40.0%
50.0%
60.0%
70.0%
80.0%
ACT
NSW
NT
QLD
SA
TAS
VIC
WA
Did not answer this questions
Don't know
Are you eligible?
Are you receiving?

PART C: ENERGY MANAGEMENT

23. How do you think your household's energy consumption PER PERSON compares with the average Australian household?

Reinforcing opinions seen elsewhere in the survey sample, the respondents consider themselves to be an energy efficient group. Over 85% of the sample respondents believe that they use average or less amounts for both electricity and gas. This is consistent with the relatively low bills seen in earlier answers. This sample is relatively frugal with its energy use, and consumes below average energy.

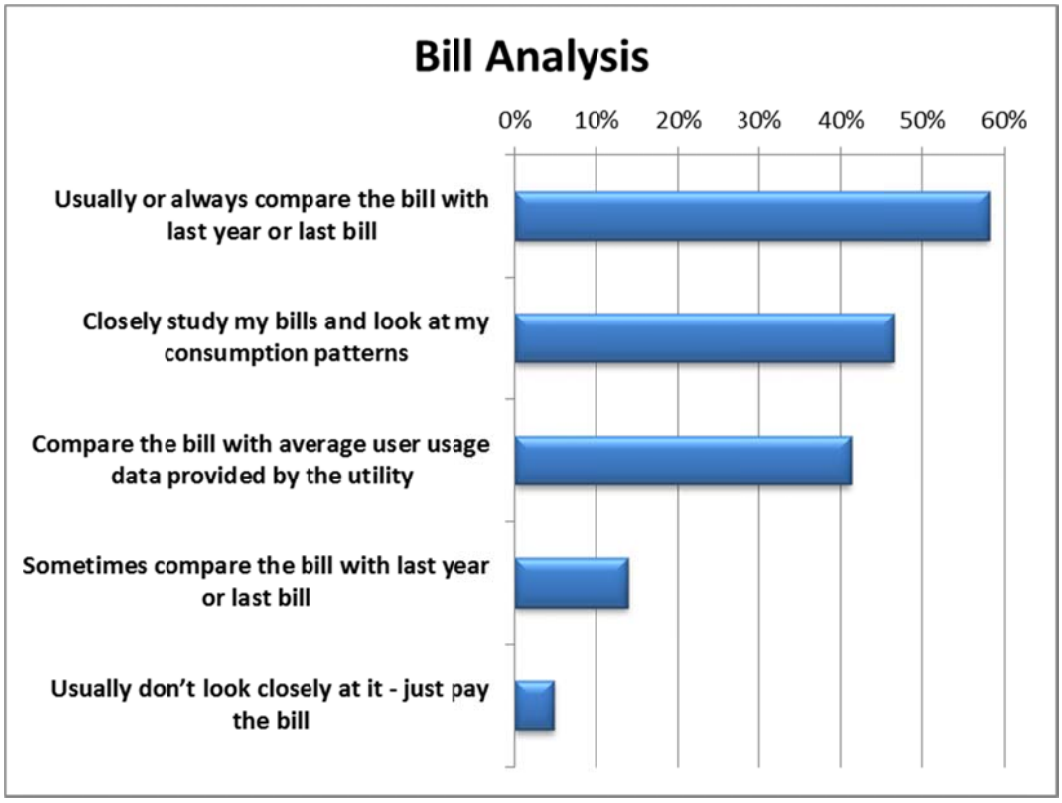
	Consume lot less	Consume little less	Consume average amount	Consume little more	Consume lot more
Electricity	25.0%	29.8%	31.8%	11.0%	2.5%
Gas	25.7%	33.7%	33.6%	6.3%	0.7%



24. How closely do you look at your energy bills?

This sample pays quite high attention to its energy bills. This may indicate an opportunity and appetite for further engagement with the energy use and understanding the costs of electricity.

	Bill Analysis
Usually or always compare the bill with last year or last bill	58.1%
Closely study my bills and look at my consumption patterns	46.5%
Compare the bill with average user usage data provided by the utility	41.1%
Sometimes compare the bill with last year or last bill	13.8%
Usually don't look closely at it - just pay the bill	4.7%

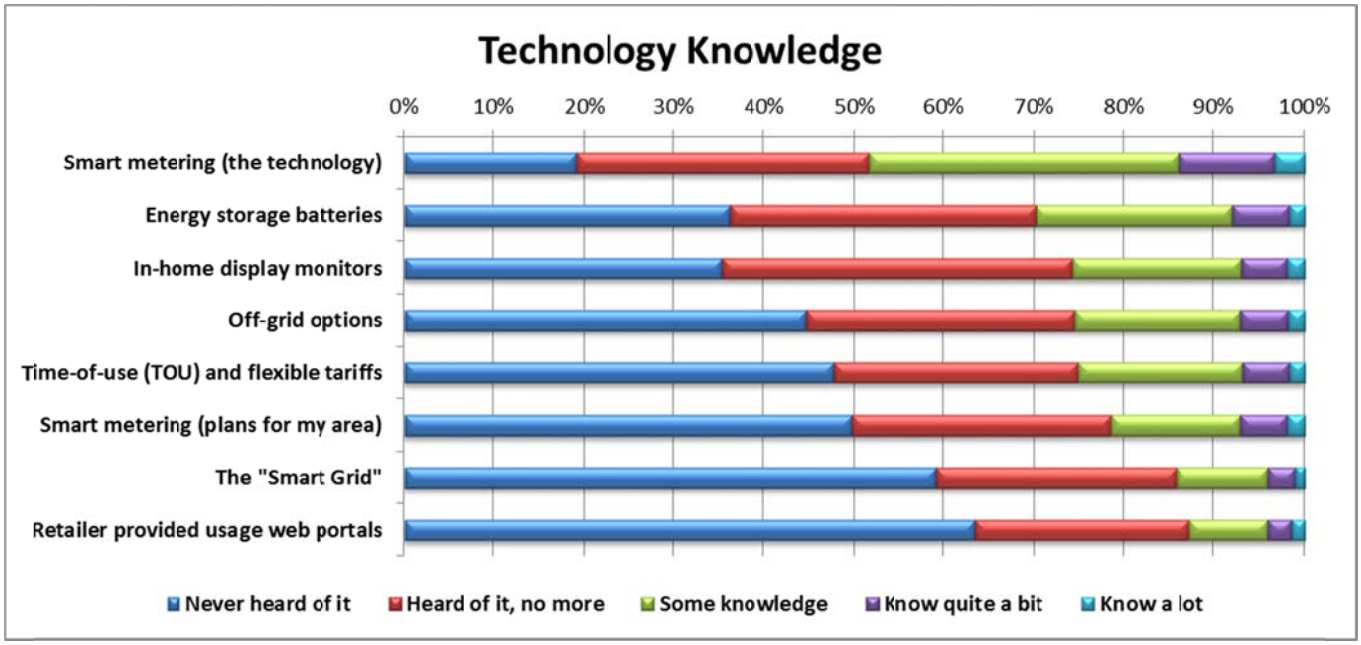


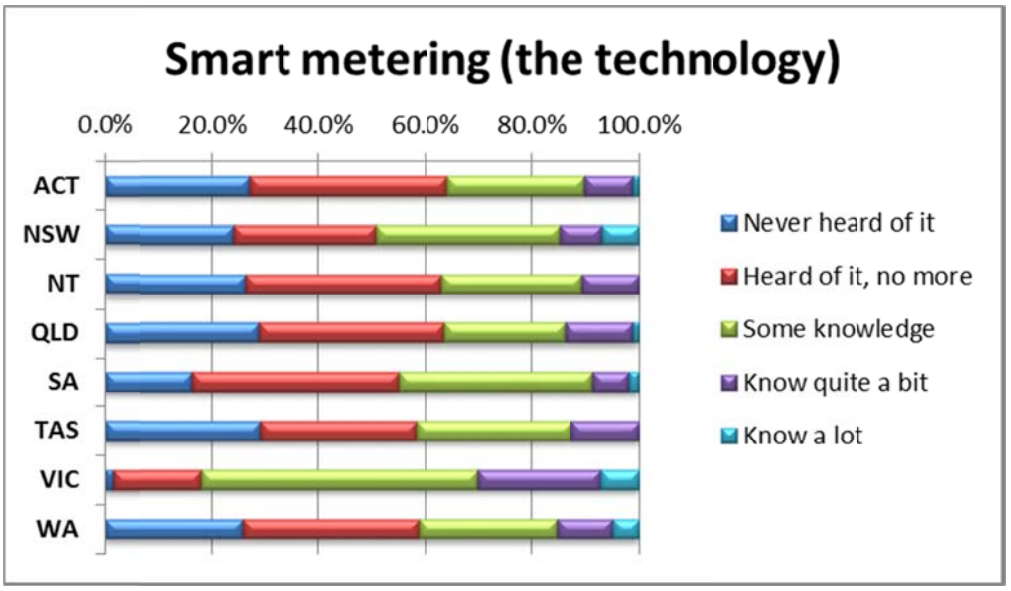
25. Level of knowledge about various new technologies

The sample respondents have demonstrated that they can be considered an energy-wise group with regard to the traditional supply and usage of energy. However, there is considerable opportunity for COTA to provide reference materials and information to its members around emerging trends in energy management. Only 7.3% of the sample would appear to be reasonably informed, while 75% have no working knowledge of these tools and technologies.

We would expect knowledge of some technologies to be low. Jurisdictional differences, such as a higher level of knowledge regarding smart meters in Victoria, are consistent with the rollout that is occurring in Victoria but not elsewhere in Australia. Knowledge of smart meter technology and rollout plans is still lower than we would expect in Victoria, given that the rollout is now almost complete.

	Never heard of it	Heard of it, no more	Some knowledge	Know quite a bit	Know a lot
Smart metering (the technology)	19.1%	32.5%	34.5%	10.6%	3.4%
Energy storage batteries	36.2%	34.0%	22.0%	6.2%	1.7%
In-home display monitors	35.3%	38.9%	18.9%	5.0%	1.9%
Off-grid options	44.6%	30.0%	18.4%	5.2%	1.8%
Time-of-use (TOU) and flexible tariffs	47.6%	27.3%	18.3%	5.1%	1.7%
Smart metering (plans for my area)	49.6%	28.9%	14.4%	5.1%	1.9%
The "Smart Grid"	59.2%	26.6%	10.1%	3.1%	1.0%
Retailer provided usage web portals	63.4%	23.9%	8.6%	2.6%	1.4%




Smart metering (the technology)
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40.0%
60.0%
80.0%
100.0%
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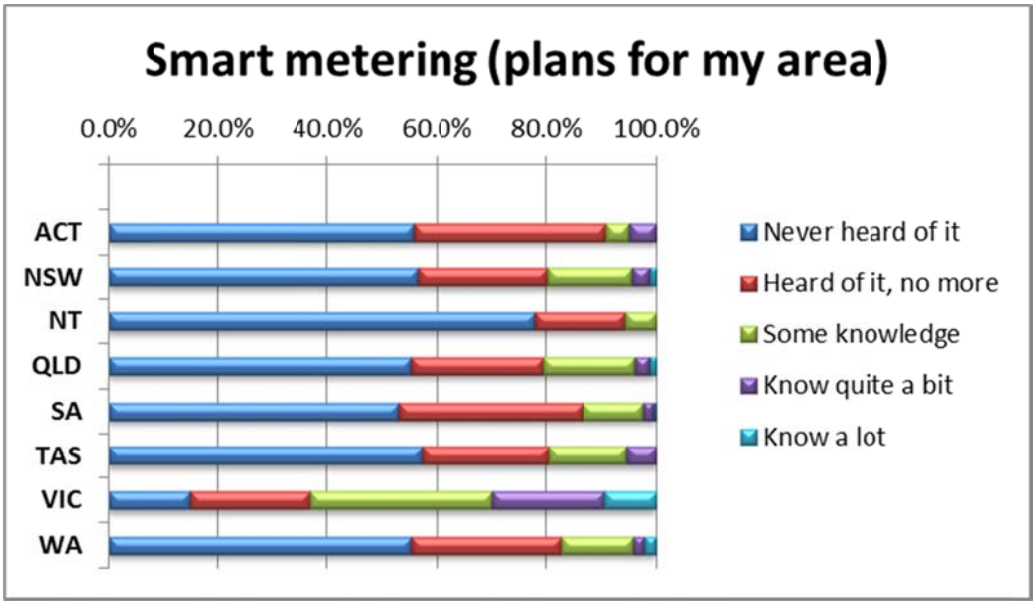
VIC
WA
Never heard of it
Heard of it, no more
Some knowledge
Know quite a bit
Know a lot


Smart metering (plans for my area)
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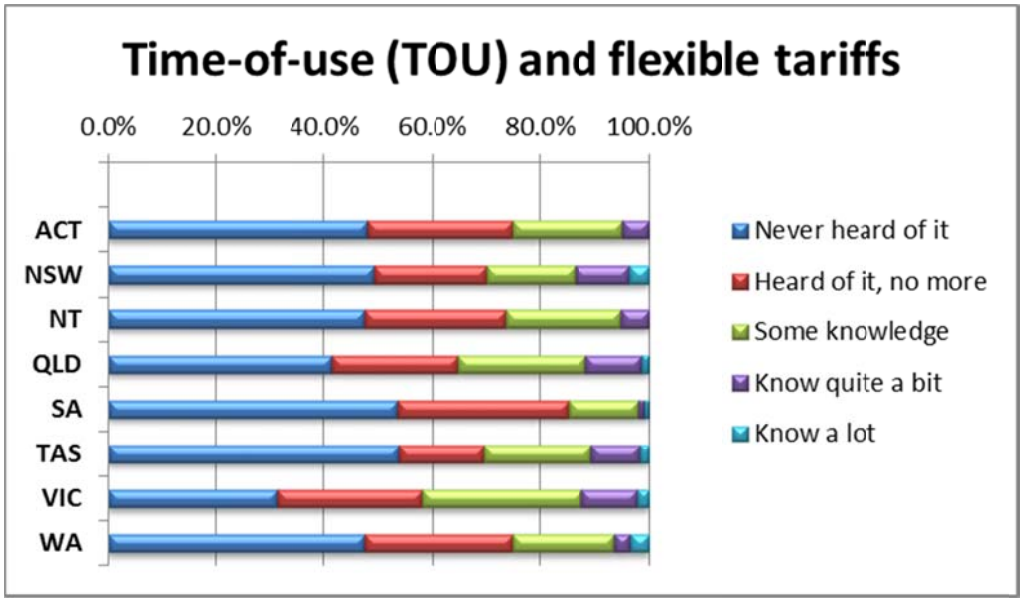
Never heard of it
Heard of it, no more
Some knowledge
Know quite a bit
Know a lot


Time-of-use (TOU) and flexible tariffs
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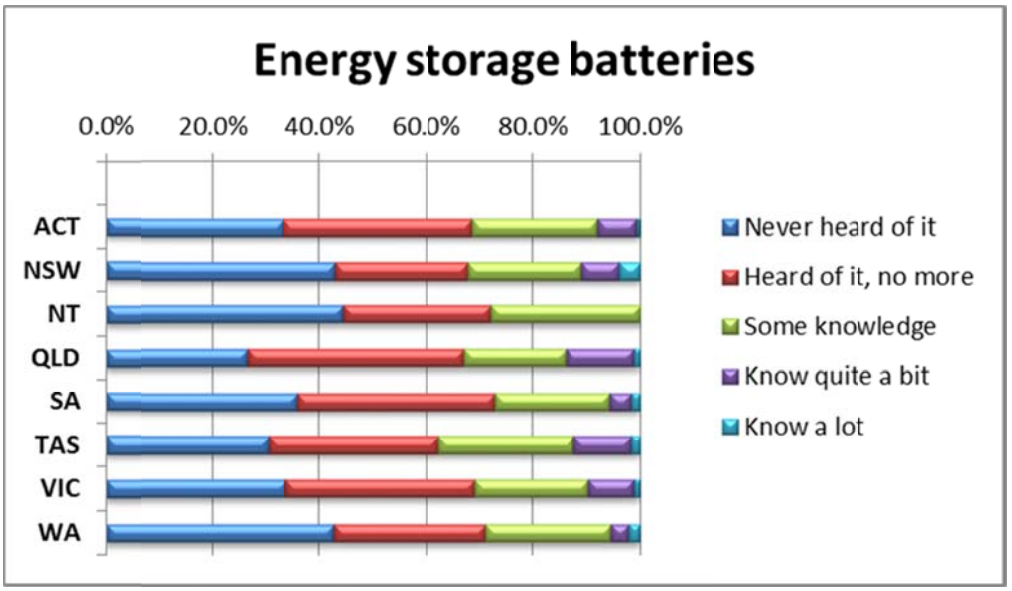
Never heard of it
Heard of it, no more
Some knowledge
Know quite a bit
Know a lot


Energy storage batteries
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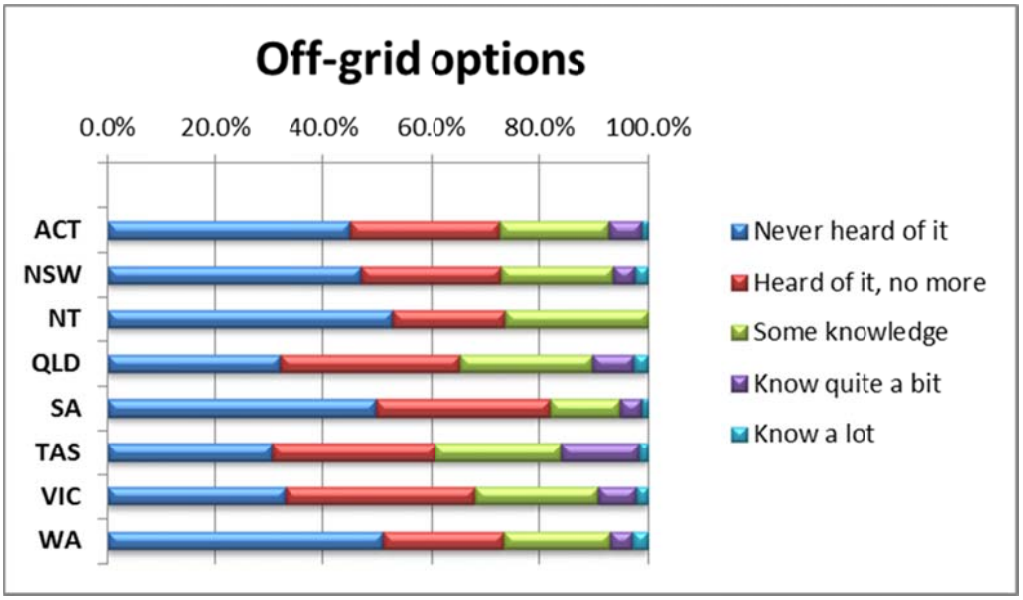
Never heard of it
Heard of it, no more
Some knowledge
Know quite a bit
Know a lot


Off-grid options
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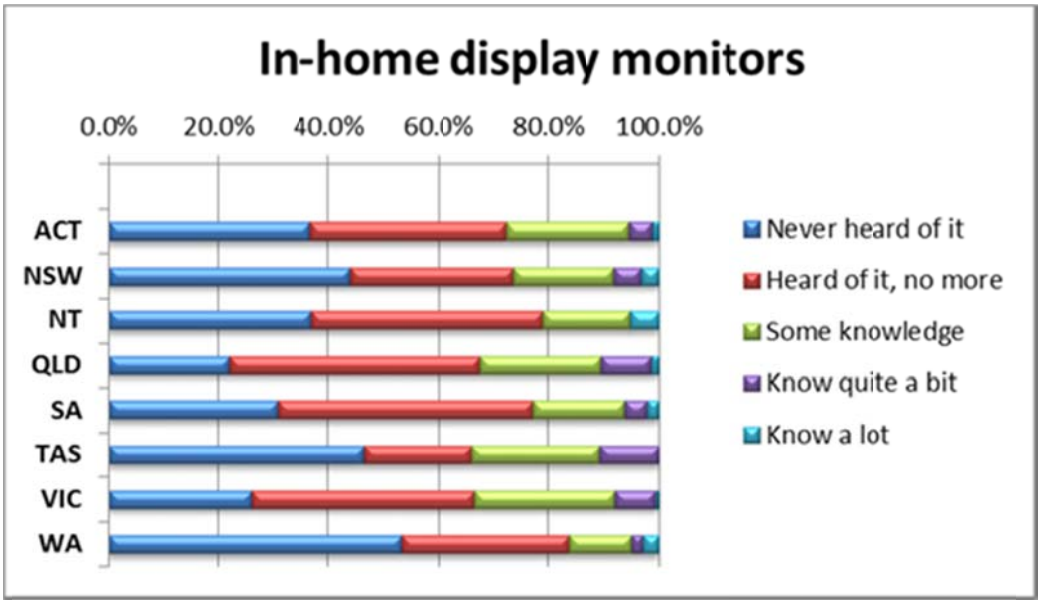
Never heard of it
Heard of it, no more
Some knowledge
Know quite a bit
Know a lot


In-home display monitors
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100.0%
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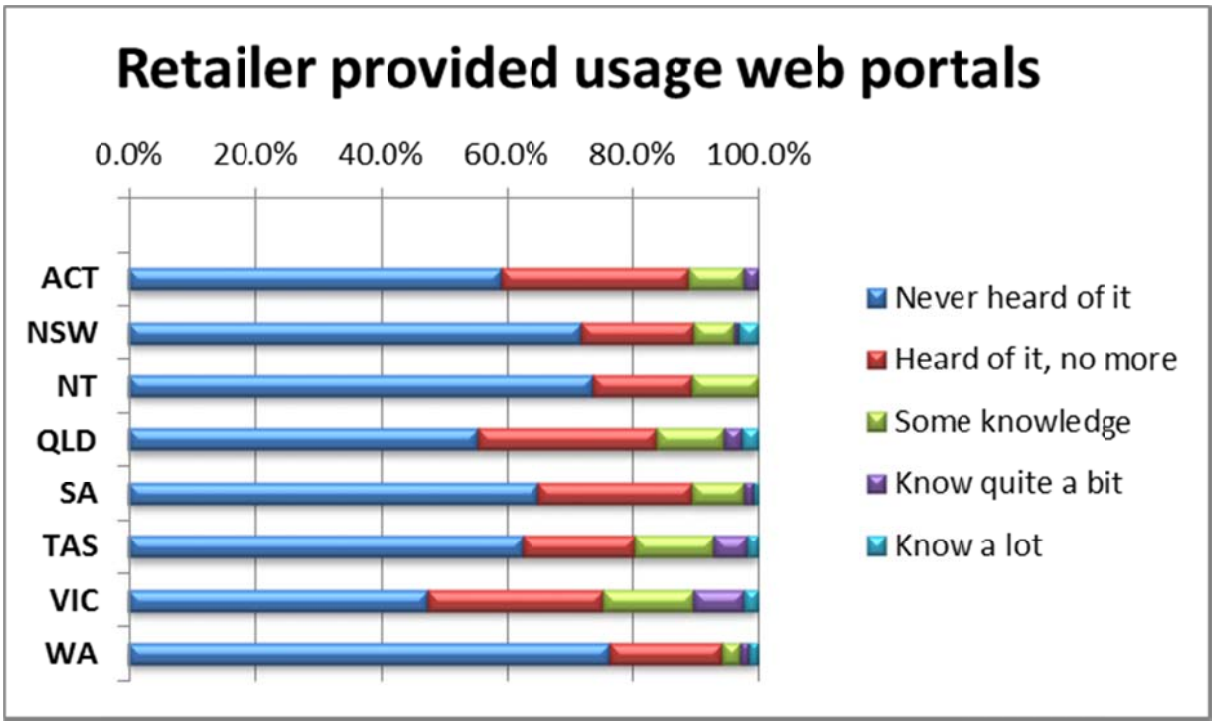
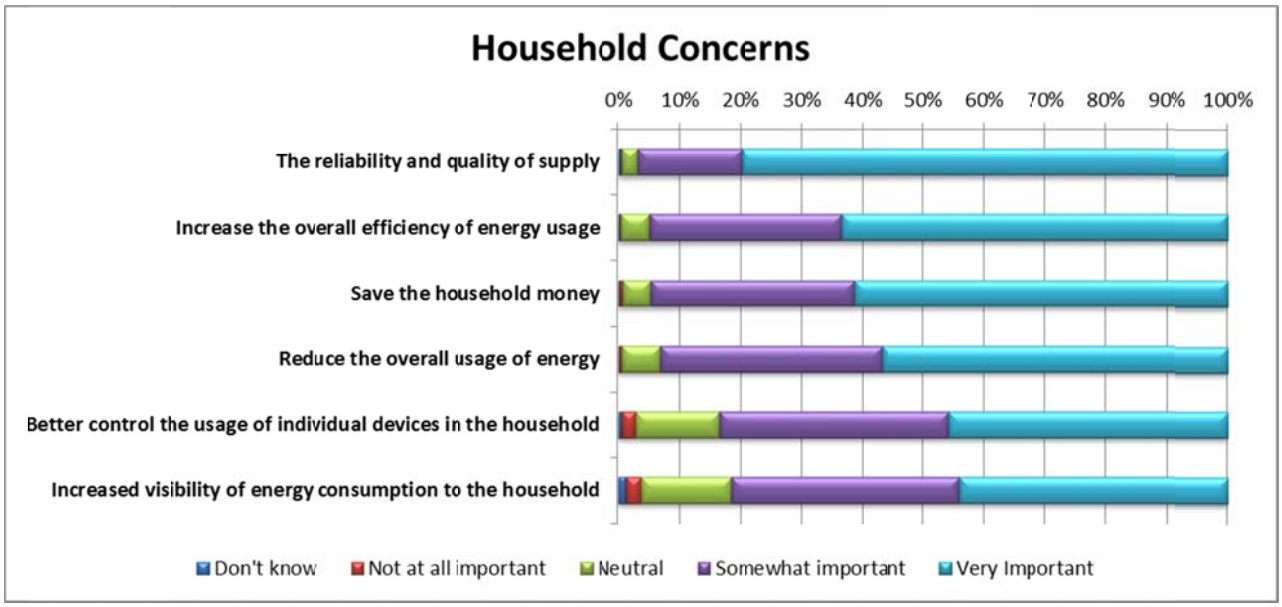
VIC
WA
Never heard of it
Heard of it, no more
Some knowledge
Know quite a bit
Know a lot



26. How important is each of the following to you?

When asked about specific aspects of their energy supply, reliability and quality of supply was ranked as a primary concern for the respondents. It ranked considerably higher than the second and third rated concerns of increasing the overall efficiency of energy usage, and saving the household money. We understand that energy affordability has previously often been found to be a primary concern among older Australians. The results here may reflect the wording of the options in the question which did not specifically mention energy affordability, as well as the demographics of the survey. As seen in Q.19 above, only 12% of the sample respondents have difficulty paying an energy bill.

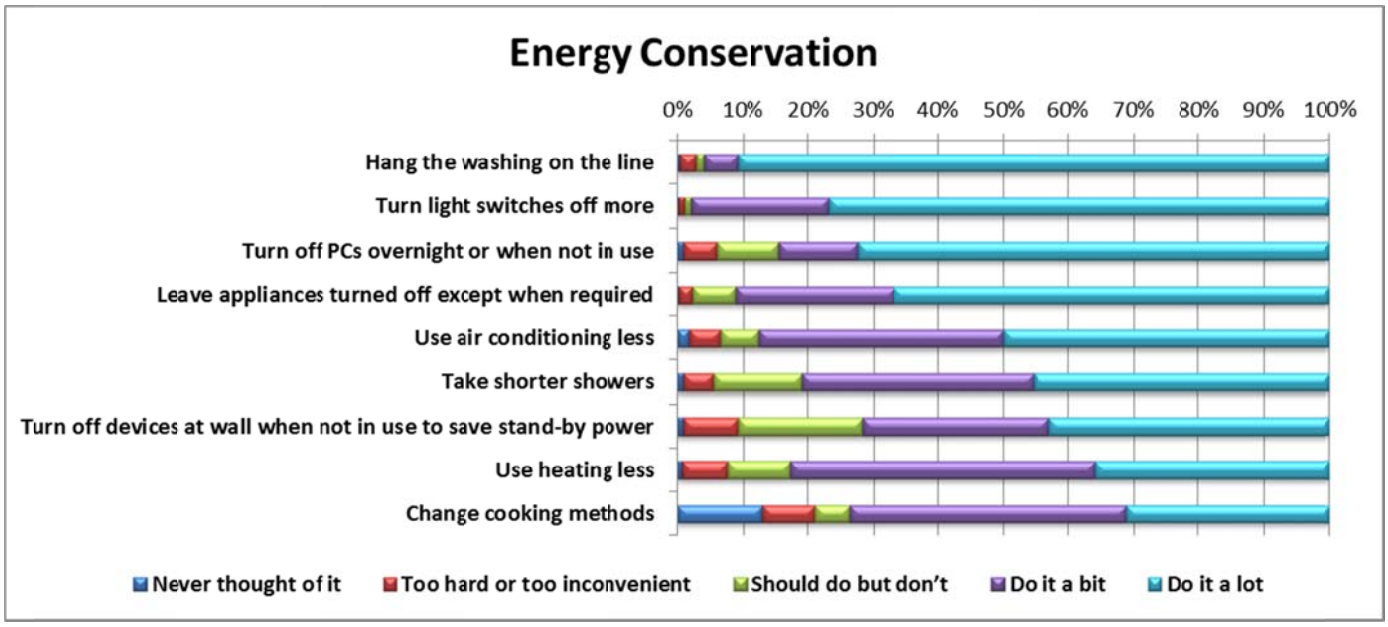
	Don't know	Not at all important	Neutral	Somewhat important	Very Important
The reliability and quality of supply	0.4%	0.2%	2.6%	16.9%	79.9%
Increase the overall efficiency of energy usage	0.2%	0.2%	4.6%	31.3%	63.7%
Save the household money	0.2%	0.5%	4.6%	33.2%	61.5%
Reduce the overall usage of energy	0.2%	0.5%	6.2%	36.2%	57.0%
Better control the usage of individual devices in the household	0.6%	2.4%	13.6%	37.7%	45.8%
Increased visibility of energy consumption to the household	1.2%	2.5%	14.6%	37.5%	44.2%



27. Do you personally do any of the following to conserve energy?

Our survey respondents continue to demonstrate their attitudes toward conserving energy at home, with on average 57% of the respondents practising these energy conservation techniques "a lot". There is an overall understanding on what constitutes best practice in residential energy conservation.

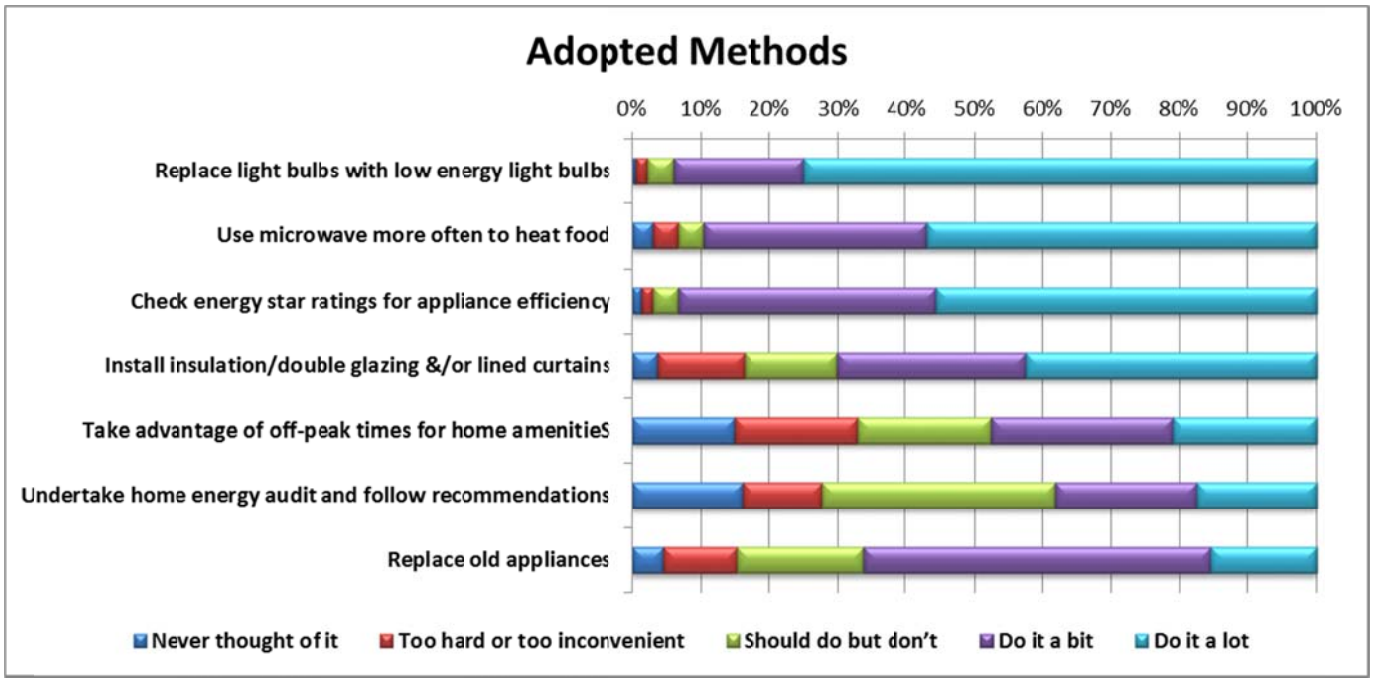
	Never thought of it	Too hard or too inconvenient	Should do but don't	Do it a bit	Do it a lot
Hang the washing on the line	0.4%	2.5%	1.2%	5.1%	90.8%
Turn light switches off more	0.2%	0.9%	1.0%	21.1%	76.8%
Turn off PCs overnight or when not in use	1.0%	5.1%	9.6%	12.0%	72.4%
Leave appliances turned off except when required	0.2%	2.1%	6.6%	24.2%	66.8%
Use air conditioning less	1.9%	4.6%	6.0%	37.4%	50.1%
Take shorter showers	0.9%	4.5%	13.7%	35.3%	45.5%
Turn off devices at wall when not in use to save stand-by power	0.9%	8.4%	19.0%	28.9%	42.9%
Use heating less	0.7%	6.9%	9.7%	46.9%	35.8%
Change cooking methods	13.1%	7.9%	5.3%	42.6%	31.2%



28. Methods and options used to reduce energy bills

There is a high level of engagement in energy conservation, and on average 35.7% of the sample undertake all of the following either 'a bit' or 'a lot'. On average, only 7.4% don't engage in these energy conservation activities, for a variety of reasons. There is some scope for reminding and encouraging the sample to improve on the consistency of their energy conservation practices.

	Never thought of it	Too hard or too inconvenient	Should do but don't	Do it a bit	Do it a lot
Replace light bulbs with low energy light bulbs	0.6%	1.7%	3.8%	19.0%	75.0%
Use microwave more often to heat food	3.1%	3.7%	3.6%	32.8%	56.9%
Check energy star ratings for appliance efficiency	1.4%	1.7%	3.6%	37.7%	55.6%
Install insulation/double glazing &/or lined curtains	3.7%	12.7%	13.5%	27.7%	42.5%
Take advantage of off-peak times for home amenities	14.8%	18.0%	19.6%	26.7%	20.9%
Undertake home energy audit and follow recommendations	16.1%	11.6%	34.2%	20.8%	17.3%
Replace old appliances	4.6%	10.7%	18.4%	51.1%	15.3%



Question 28 allowed free text additions by respondents. Several of the responses here indicated that much thought had been given to ways to conserve energy and reduce bills. Some of the responses suggested that there may be unresolved problems, where respondents were not comfortable in their own homes. These include those that said that they went to bed early to keep warm, or only heated their home when visitors came, or they went to places outside the home (such as libraries or shopping centres) to keep warm in winter or cool in summer.

PART D: ENERGY RETAILERS AND OTHER INDUSTRY ENGAGEMENT

29. Do you have a choice for your energy retailers?

The majority of respondents realise they have a choice of energy retailer. 1 in 5 (20.5%) of respondents has exercised the option in the last two years to switch their retailer for electricity or gas (or both). Given that not all respondents actually had choice of retailer, the actual percentage of those who could switch who had switched in the last two years is likely to be closer to 30%.

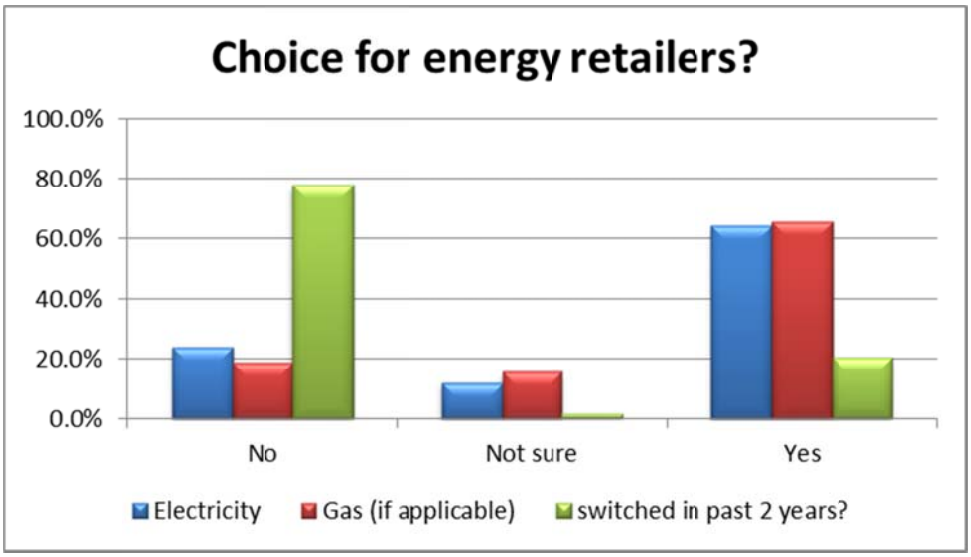
The survey did not ask separately whether respondents had switched one or both fuels, or how many times they had switched in the last two years. It is therefore difficult to compare this result with national switching statistics.

There is significant potential for this group of consumers to reduce their cost of energy simply through retailer churn and looking for better discount structures. When read in conjunction with Q.30, there is a view among these consumers that all energy retailers provide a similar service and a similar price. There is a level of confusion being demonstrated in the rates structure. Given the education levels and overall awareness of the sample, it is likely that individual consumers have not yet addressed the benefits of a competitive market place for energy.

At the end of the survey, there was an opportunity for respondents to provide free text comments on any part of the survey. Some respondents used this final question to ask whether COTA had or could put in place a special deal with an energy retailer that could be available to COTA members. This may represent an opportunity for COTA to consider putting in place such a deal.

Do you have choice of energy retailer?

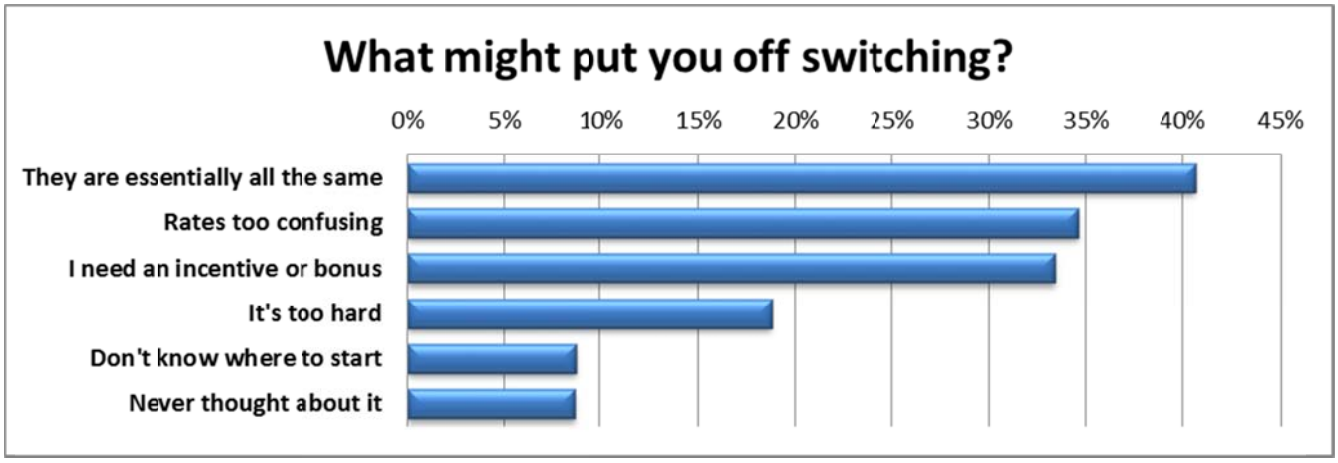
	No	Not sure	Yes
Electricity	23.8%	12.0%	64.2%
Gas (if applicable)	18.7%	15.6%	65.7%
Switched in past 2 years?	77.9%	1.7%	20.5%



30. What might put you off switching energy retailer?

A variety of reasons are given for not switching energy retailer.

	Reasons for not switching
They are essentially all the same	40.7%
Rates too confusing	34.6%
I need an incentive or bonus	33.4%
It's too hard	18.8%
Don't know where to start	8.7%
Never thought about it	8.6%



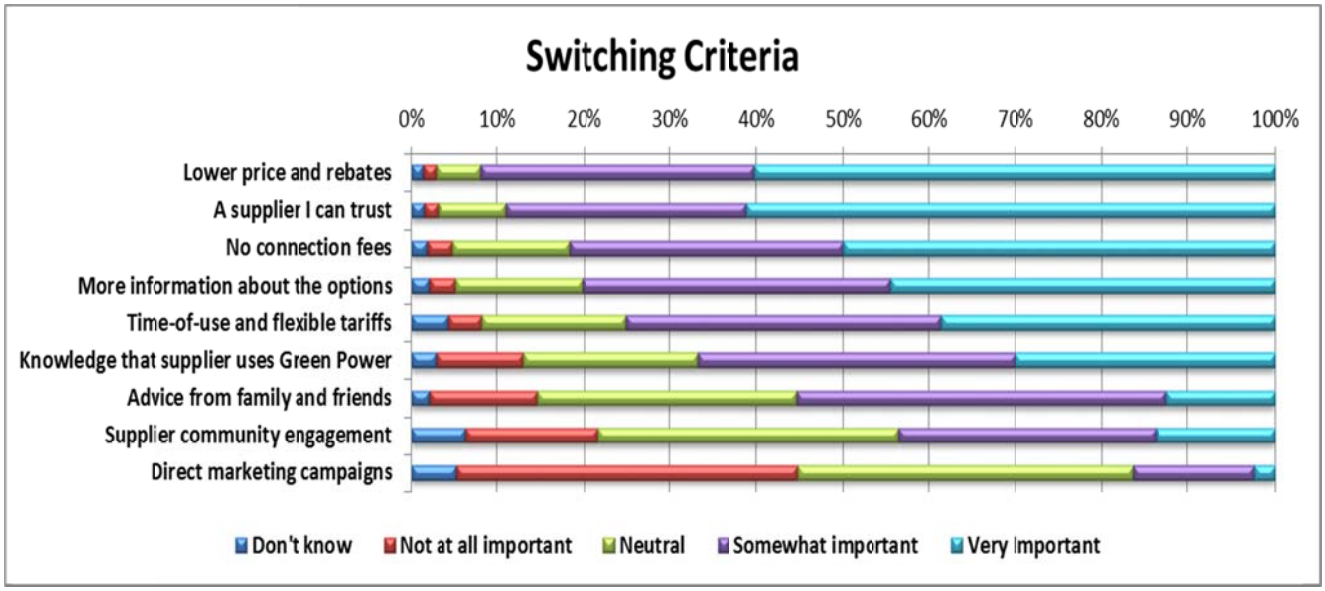
38. How important would each of the following factors be in influencing you to change your energy retailer?

(**Note** – This question has been repositioned in this report as against where it was in the survey. This is in order to align it better with the subject matter.)

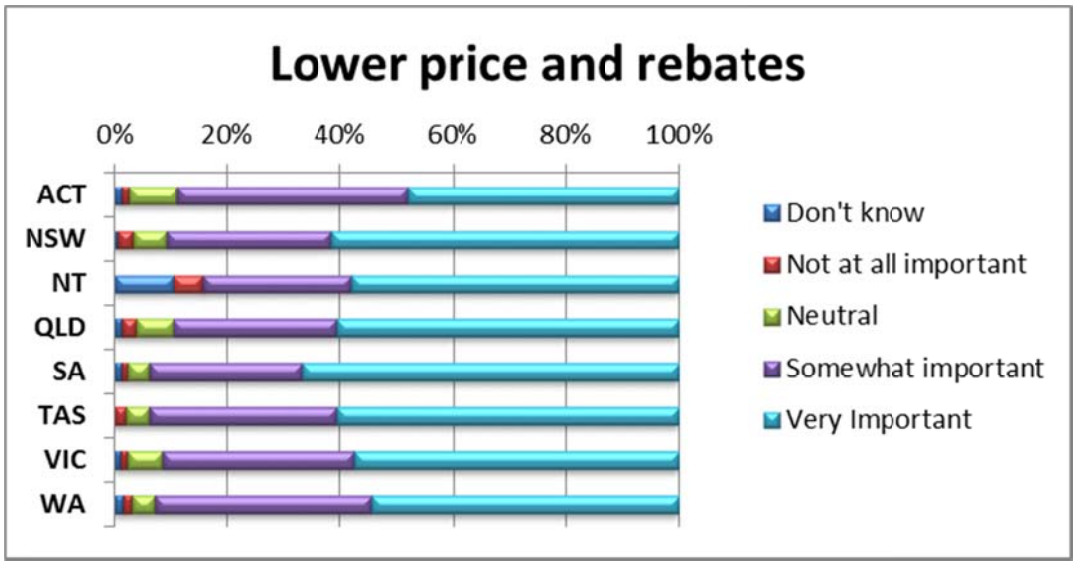
Pricing and rebates are considered by respondents to be the most important attributes in switching retailers. Respondents were also looking for suppliers they could trust. The sample does not react positively to direct marketing, and is more likely to switch retailer if there is a direct recommendation from a friend or family member.

When read in conjunction with Q.31 (below), it can be seen that the usual branding practices of energy retailers are seen as less significant than the duty of care requirements of the network provider.

	Don't know	Not at all important	Neutral	Somewhat important	Very important
Lower price and rebates	1.3%	1.6%	5.2%	31.7%	60.3%
A supplier I can trust	1.5%	1.7%	7.8%	27.9%	61.1%
No connection fees	1.8%	3.1%	13.4%	31.7%	50.0%
More information about the options	2.0%	3.1%	14.6%	35.9%	44.4%
Time-of-use and flexible tariffs	4.3%	3.9%	16.8%	36.4%	38.6%
Knowledge that supplier uses Green Power	2.8%	10.1%	20.2%	36.7%	30.1%
Advice from family and friends	2.1%	12.5%	30.0%	42.9%	12.5%
Supplier community engagement	6.3%	15.5%	34.8%	29.7%	13.8%
Direct marketing campaigns	5.3%	39.5%	38.9%	14.0%	2.4%



These results are shown by jurisdiction in the figures below.


Lower price and rebates
0%
20%
40%
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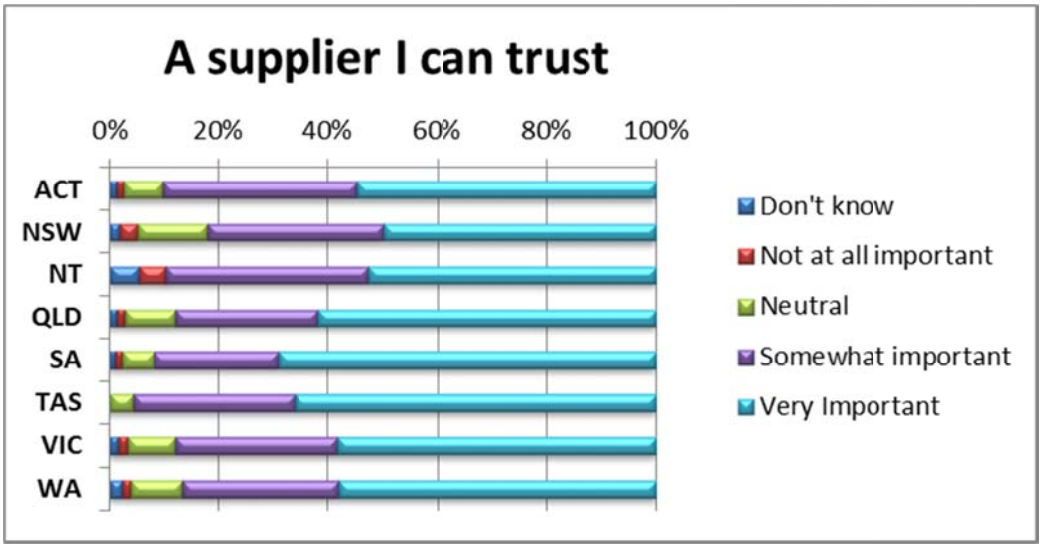
Don't know
Not at all important
Neutral
Somewhat important
Very Important


A supplier I can trust
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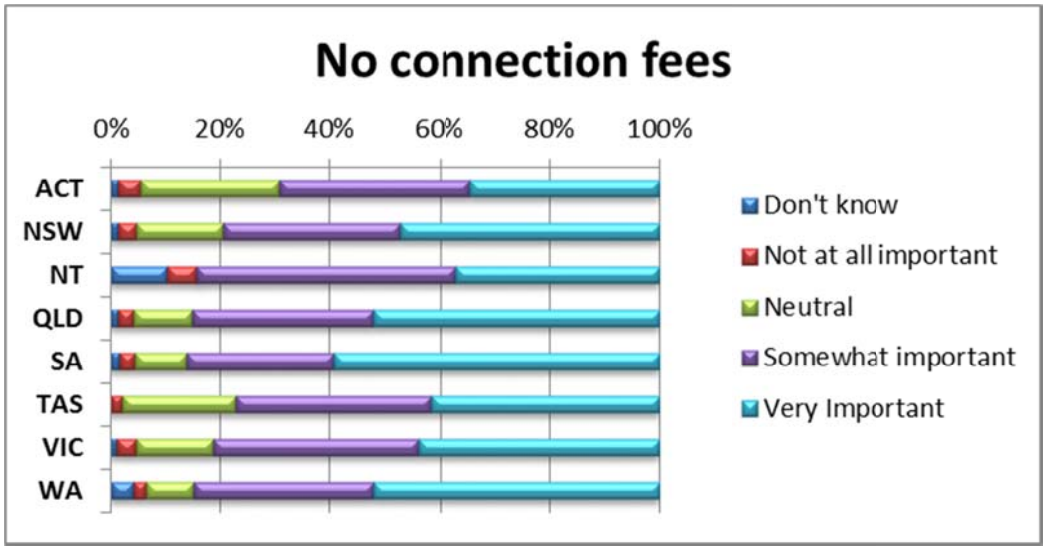
Don't know
Not at all important
Neutral
Somewhat important
Very Important


No connection fees
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Don't know
Not at all important
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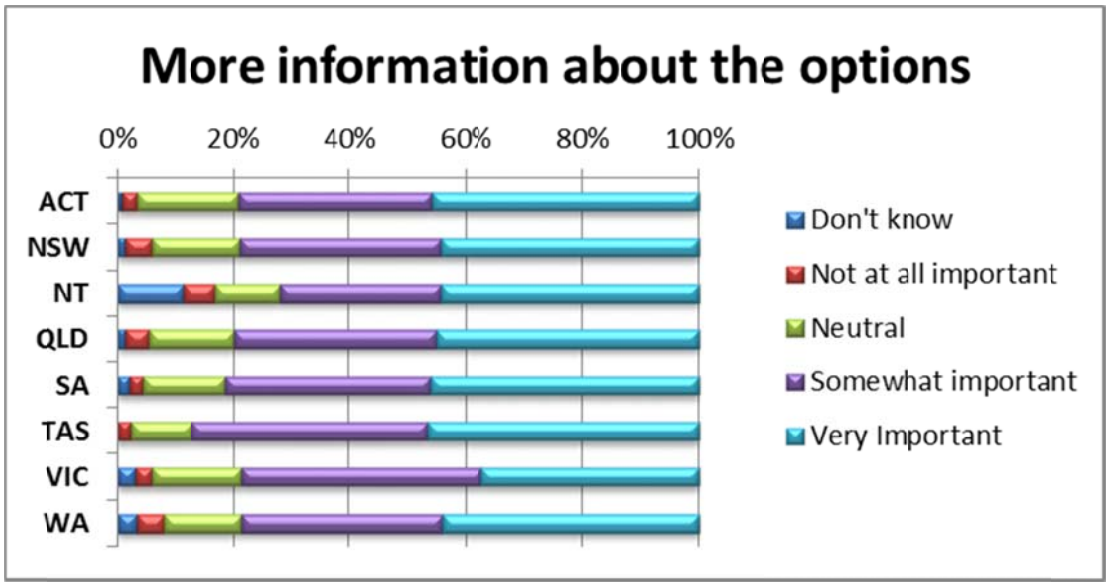
Very Important


More information about the options
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Not at all important
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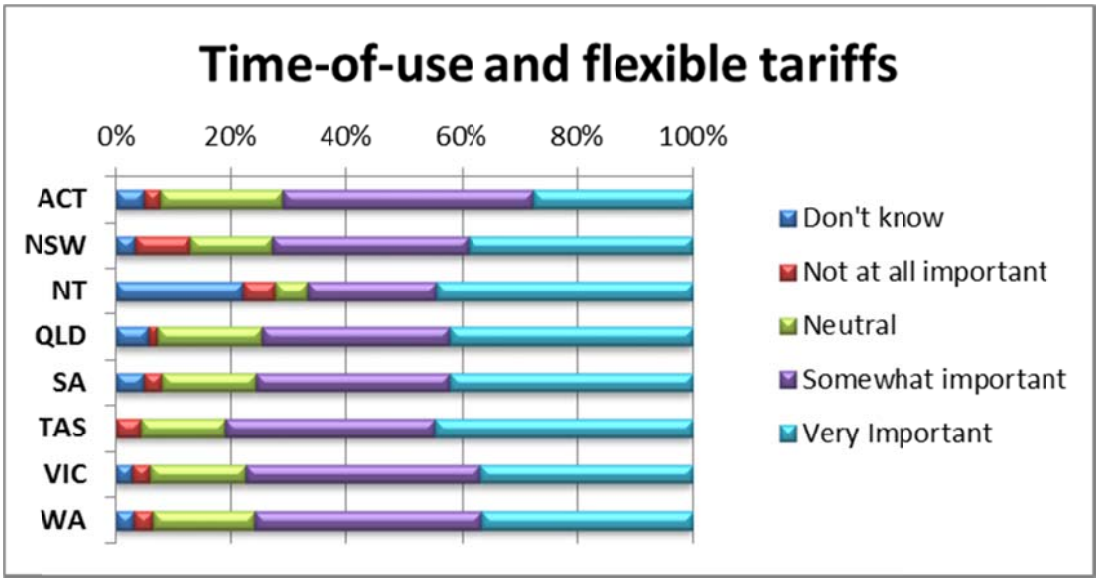
Time-of-use and flexible tariffs
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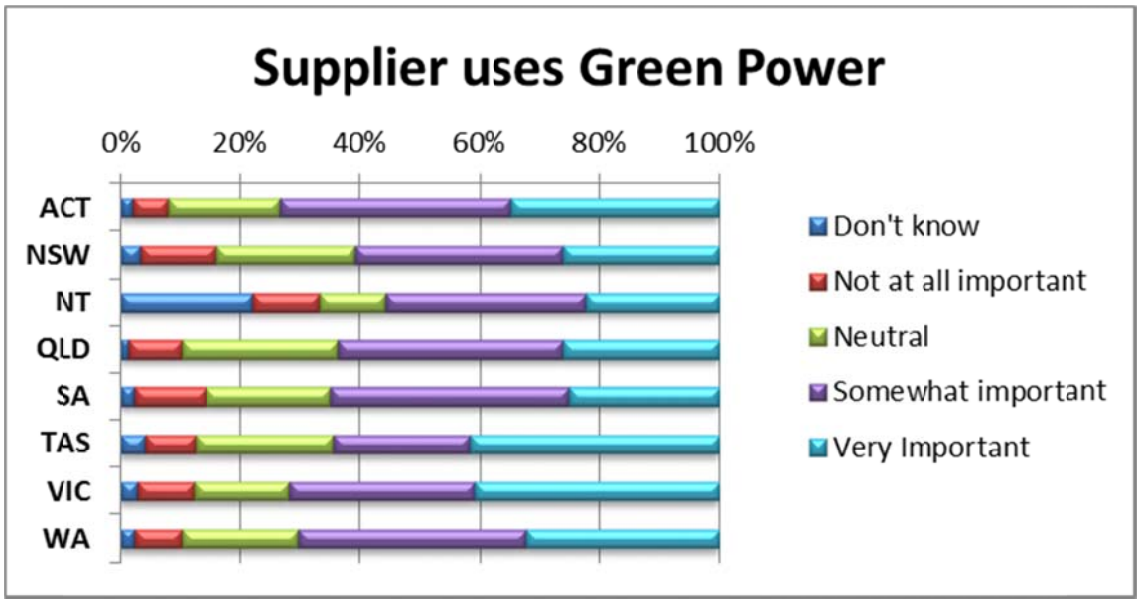
Supplier uses Green Power
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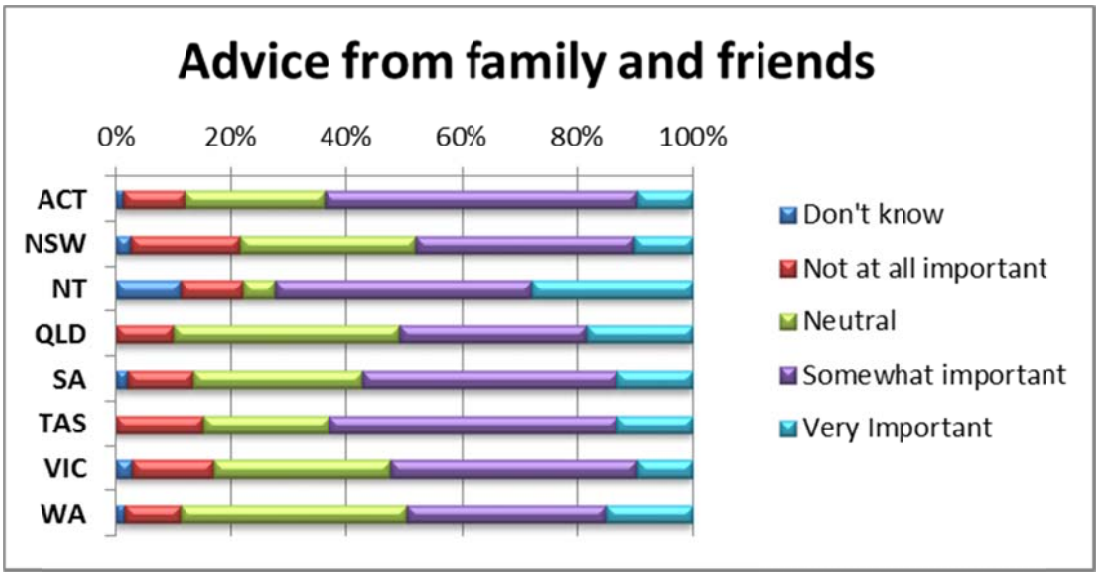
Don't know
Not at all important
Neutral
Somewhat important
Very Important


Advice from family and friends
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Don't know
Not at all important
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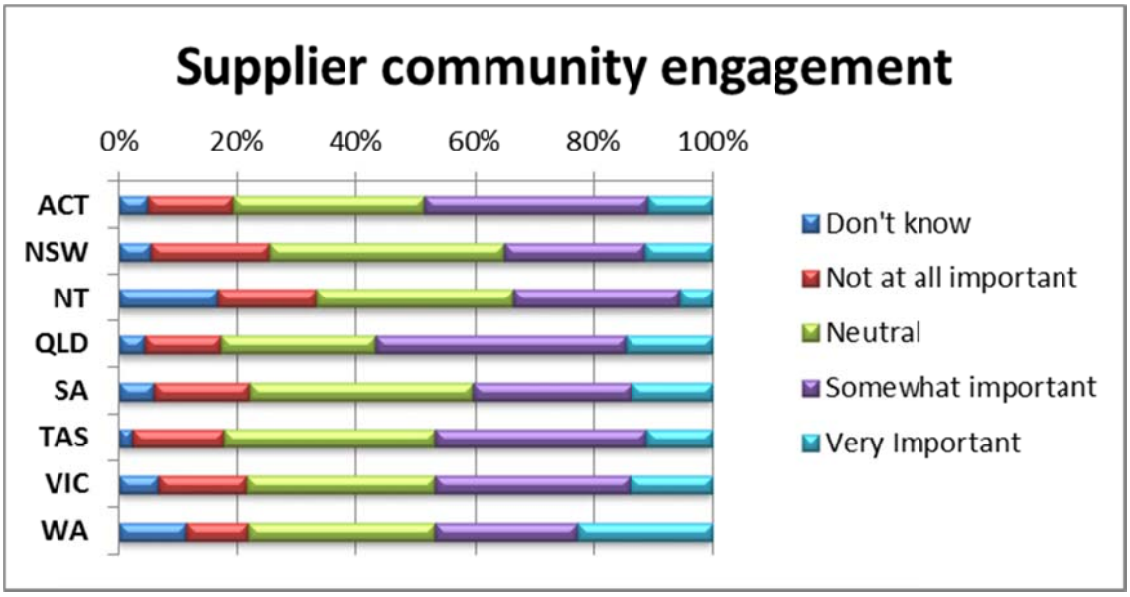
Somewhat important
Very Important


Supplier community engagement
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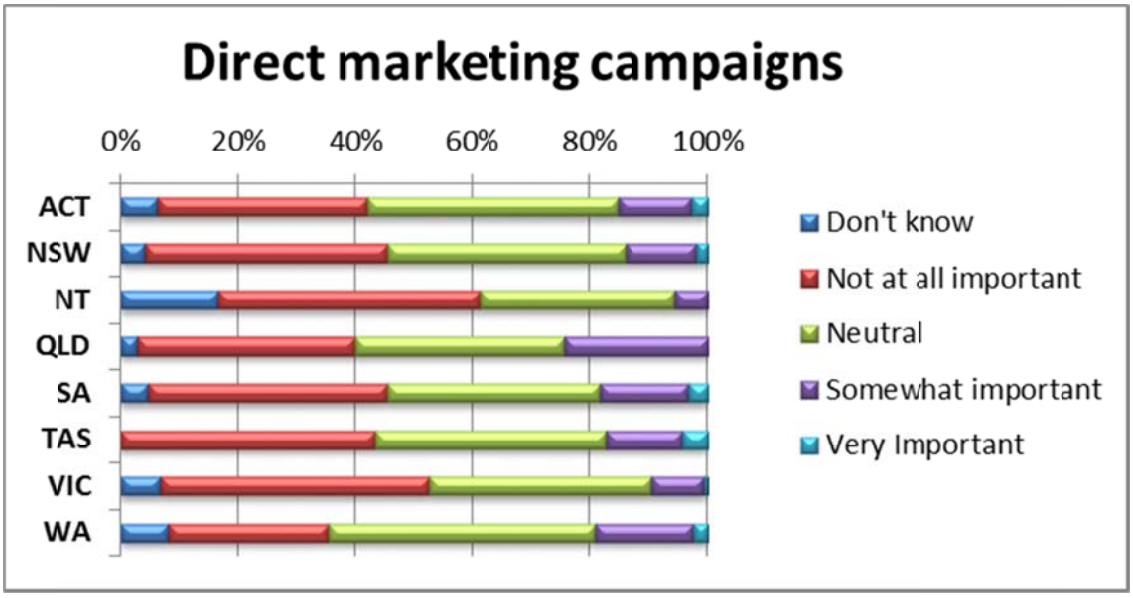
Very Important


Direct marketing campaigns
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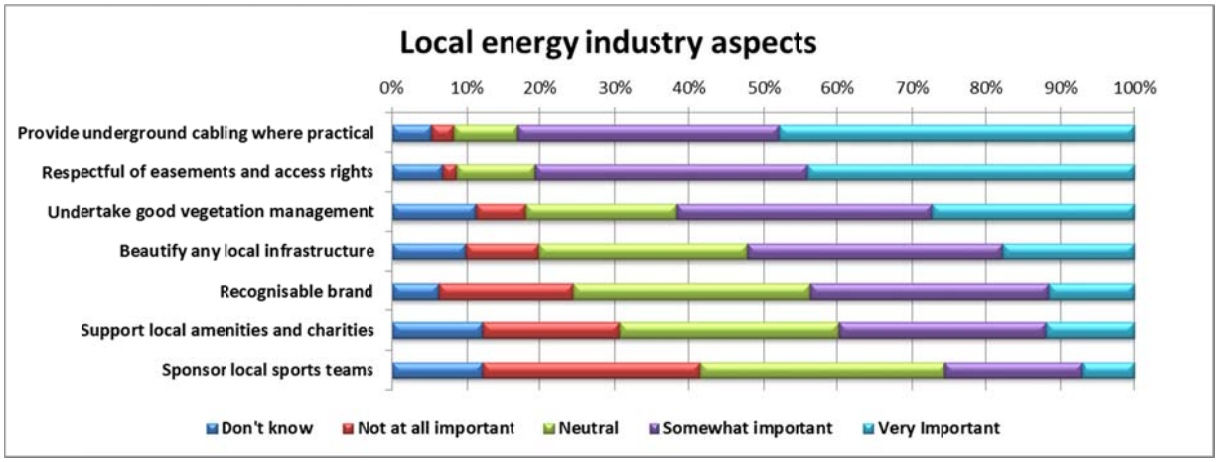
SA
TAS
VIC
WA
Don't know
Not at all important
Neutral
Somewhat important
Very Important

31. Importance of various aspects of the local energy industry

Respondents attached varying levels of importance to 'aspects of the local energy industry'. These referred largely to distribution business activities, though branding and supporting local organisations could apply equally to energy retailers.

	Don't know	Not at all important	Neutral	Somewhat important	Very important
Provide underground cabling where practical	5.2%	3.0%	8.8%	35.0%	48.0%
Respectful of easements and access rights	6.7%	1.9%	10.8%	36.6%	44.0%
Undertake good vegetation management	11.2%	6.9%	20.3%	34.2%	27.5%
Beautify any local infrastructure	9.8%	10.1%	27.9%	34.5%	17.8%
Recognisable brand	6.2%	18.2%	32.0%	32.0%	11.6%
Support local amenities and charities	12.0%	18.6%	29.6%	27.8%	12.1%
Sponsor local sports teams	12.1%	29.4%	33.0%	18.4%	7.2%



32. Preparedness to spend to cut annual energy bills by one third

A theoretical value for the average investment consideration from the COTA sample is $1,848, which is consistent with early studies by Connection Research. There is however a strong bias toward spending up to $1,000 on energy efficiency technologies in order to reduce their bills.

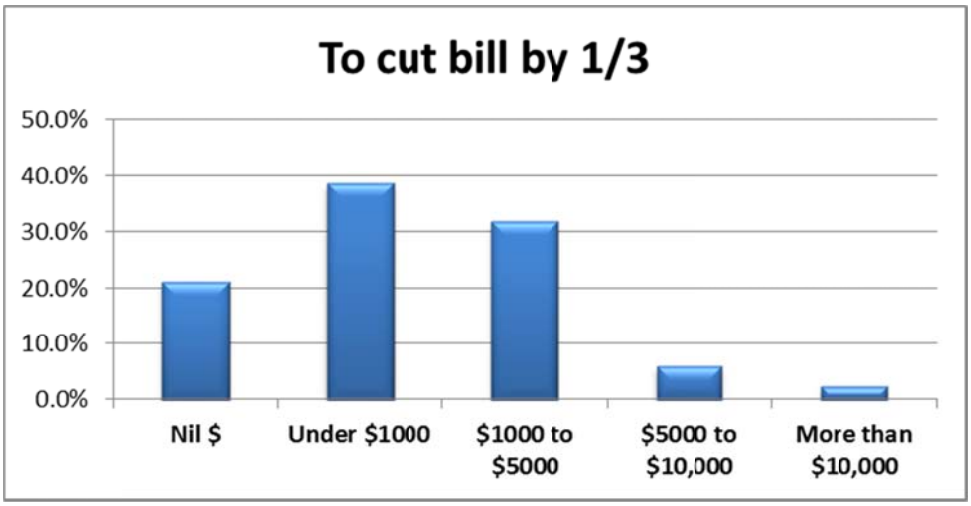
For many years, there has been a consumer consensus that $1,000 is the median investment in cutting household energy costs, although the 2013 average was $1,940**,** on a national basis. With average bills between $250 and $500 per quarter, this suggests that households would undertake further investments in energy efficiencies if there was expectation of an approximate 28 to 36 month pay-back.

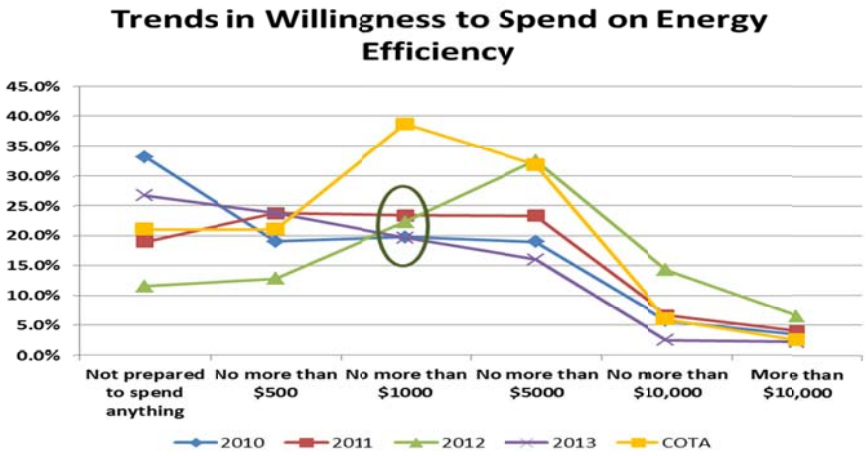
To determine the projected size of the energy efficiency marketplace, Connection Research has asked households in other surveys how much they are prepared to spend to reduce their energy bills. Although we have seen a drop-off in projected spend on energy efficiency in line with general economic conditions, from a peak in 2012, the consumer average in 2013 was still at $1,940 per household, although the 'sweet-spot' is around $1,000 per household.

We did not explain in the survey how these amounts of money might achieve reducing bills by a third; the survey question was thus somewhat theoretical in nature.

Preparedness to spend to cut annual energy bills by one third

Nil $	21.0%
Under $1000	38.7%
$1000 to $5000	31.8%
$5000 to $10,000	6.0%
More than $10,000	2.5%

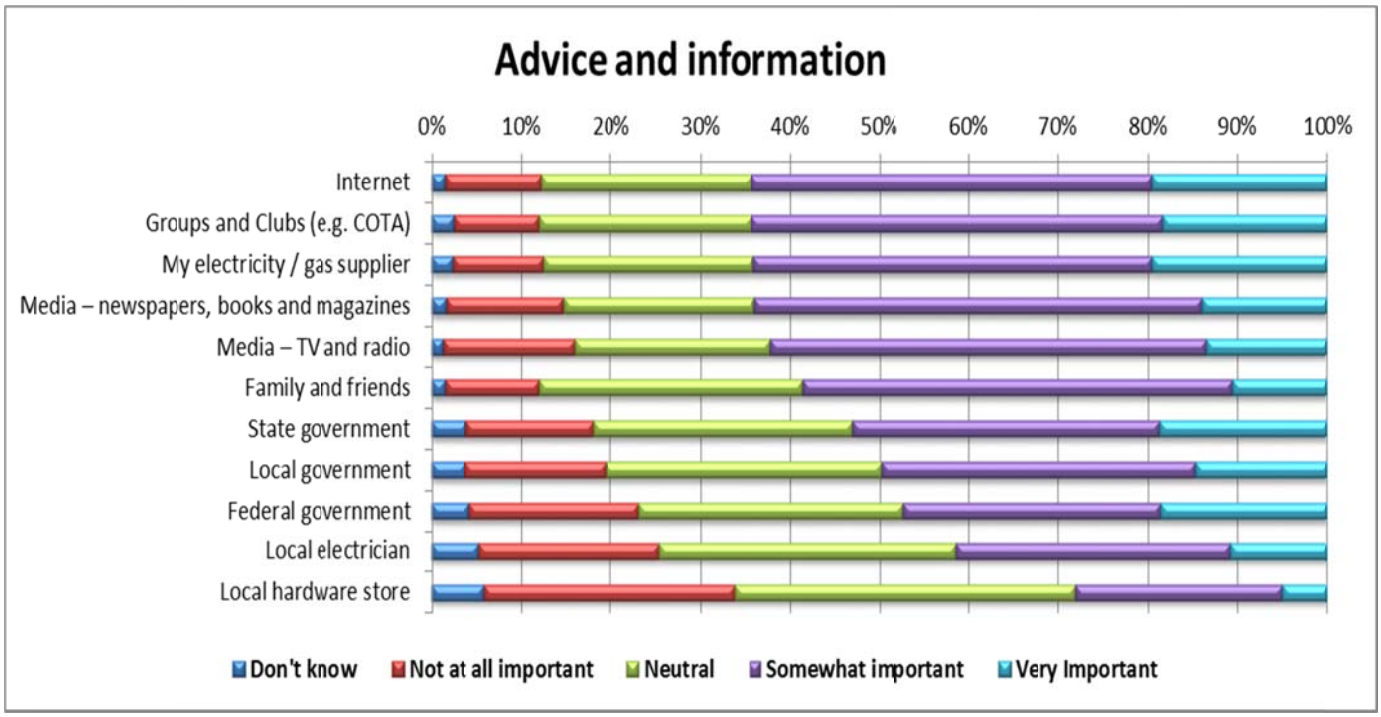




33. How important to you are the following as sources of advice and information on saving and conserving energy in the home?

The data suggests that COTA could have a significant role in providing advice and information on energy efficiency techniques. COTA is rated on a par with the Internet, and above all other potential sources of advice (media, family and friends, governments and others).

	Don't know	Not at all important	Neutral	Somewhat important	Very important
Internet	1.5%	10.8%	23.4%	44.7%	19.6%
Groups and clubs (e.g. COTA)	2.5%	9.5%	23.7%	45.9%	18.4%
My electricity / gas supplier	2.4%	10.1%	23.5%	44.5%	19.6%
Media - newspapers, books and magazines	1.6%	13.1%	21.4%	50.0%	14.0%
Media - TV and radio	1.3%	14.7%	21.9%	48.7%	13.4%
Family and friends	1.6%	10.5%	29.5%	48.0%	10.6%
State government	3.9%	14.1%	28.9%	34.2%	18.9%
Local government	3.8%	15.7%	30.7%	35.3%	14.6%
Federal government	4.3%	18.9%	29.5%	28.6%	18.7%
Local electrician	5.3%	20.2%	33.1%	30.6%	10.8%
Local hardware store	5.9%	28.0%	38.1%	23.0%	5.1%

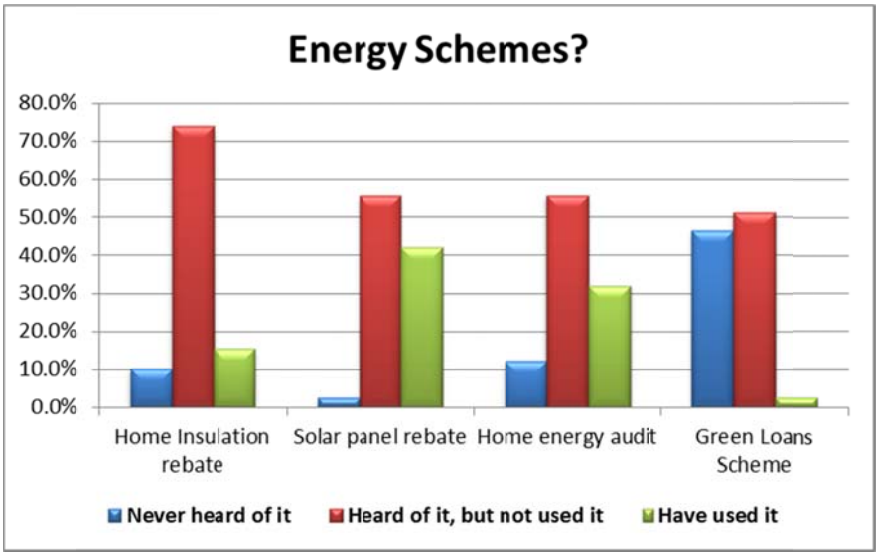


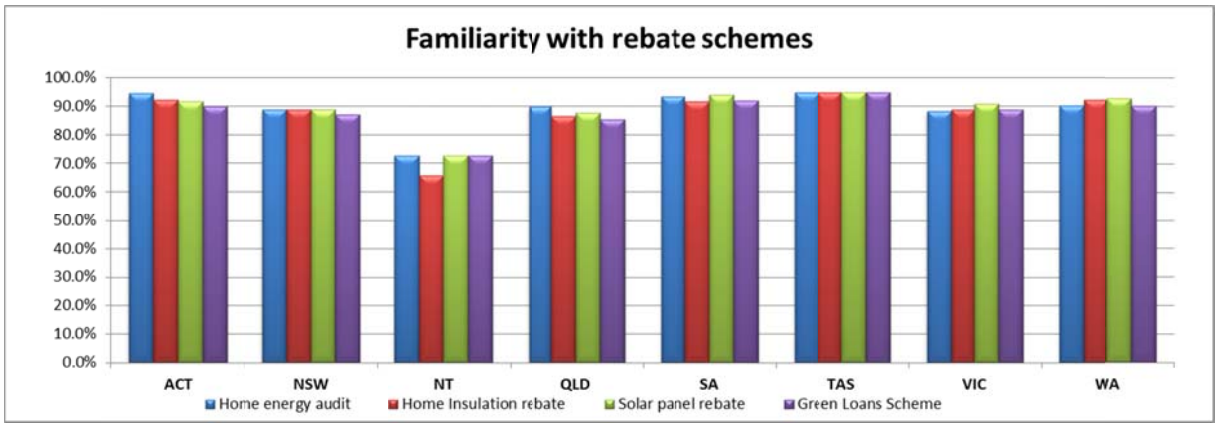
34. How familiar are you, and have you used, any of the following energy schemes?

Given the high penetration of solar energy, it comes as no surprise that there is high usage of the PV rebate. There is also potential for encouraging the use of home energy audits, since nearly 70% have not undertaken a formal audit. This data is consistent with the data collected in Q.28 on energy conservation in the use of audits.

There is considerable scope for providing a greater level of understanding around residential energy audits, although some 40% of the sample believes they are already efficient in energy conservation (see Q.35).

	Never heard of it	Heard of it, but not used it	Have used it
Home Insulation rebate	10.4%	74.1%	15.5%
Solar panel rebate	2.6%	55.5%	41.9%
Home energy audit	12.4%	55.6%	32.0%
Green Loans Scheme	46.3%	51.1%	2.6%

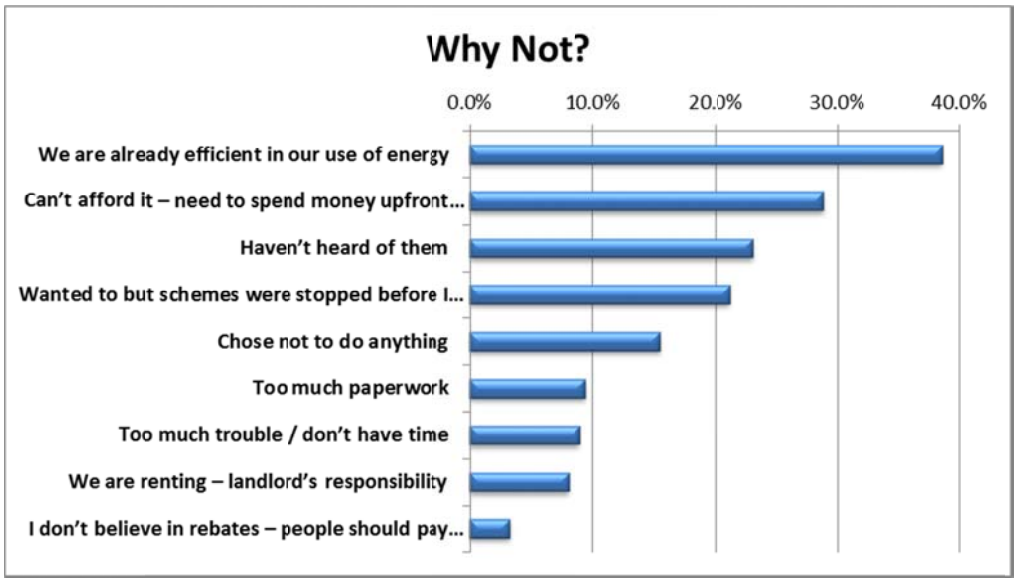


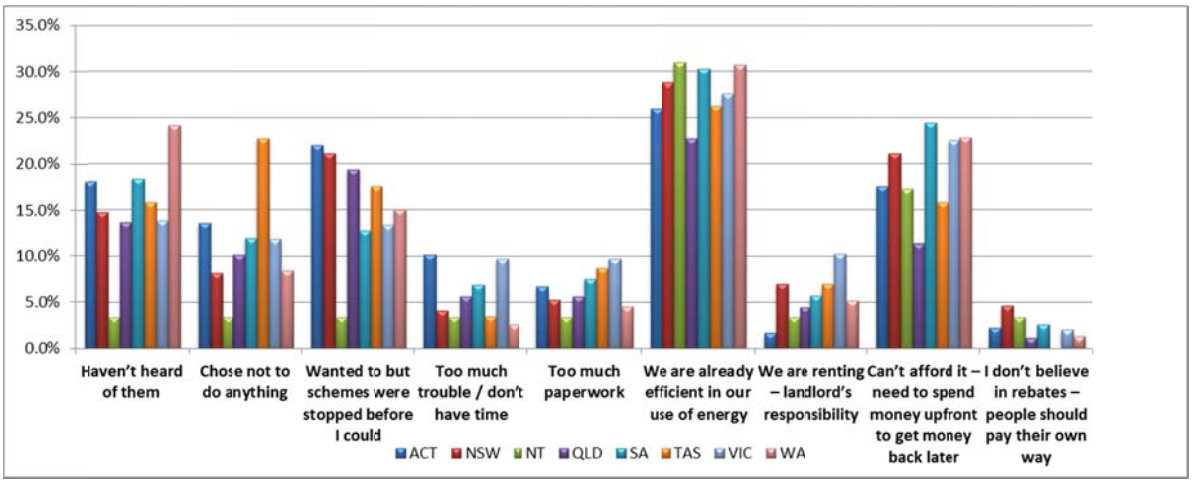


35. If you have not taken part in any schemes, why not?

There are many reasons why respondents have not used these energy schemes. Chief among them is that the household believes it is already efficient in its use of energy.

	Why Not?
We are already efficient in our use of energy	38.6%
Can't afford it - need to spend money upfront to get money back later	28.9%
Haven't heard of them	23.2%
Wanted to but schemes were stopped before I could	21.3%
Chose not to do anything	15.5%
Too much paperwork	9.5%
Too much trouble / don't have time	9.0%
We are renting - landlord's responsibility	8.0%
I don't believe in rebates - people should pay their own way	3.3%

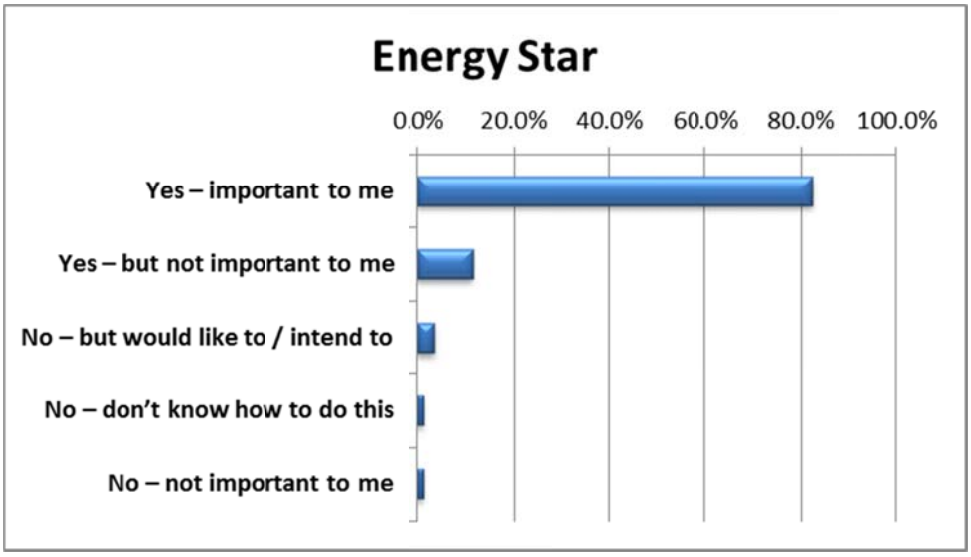




36. Have you ever used the Energy Star rating to buy energy efficient products?

Compared to previous studies by Connection Research, the value placed on the Energy Star rating system is higher than previously seen.

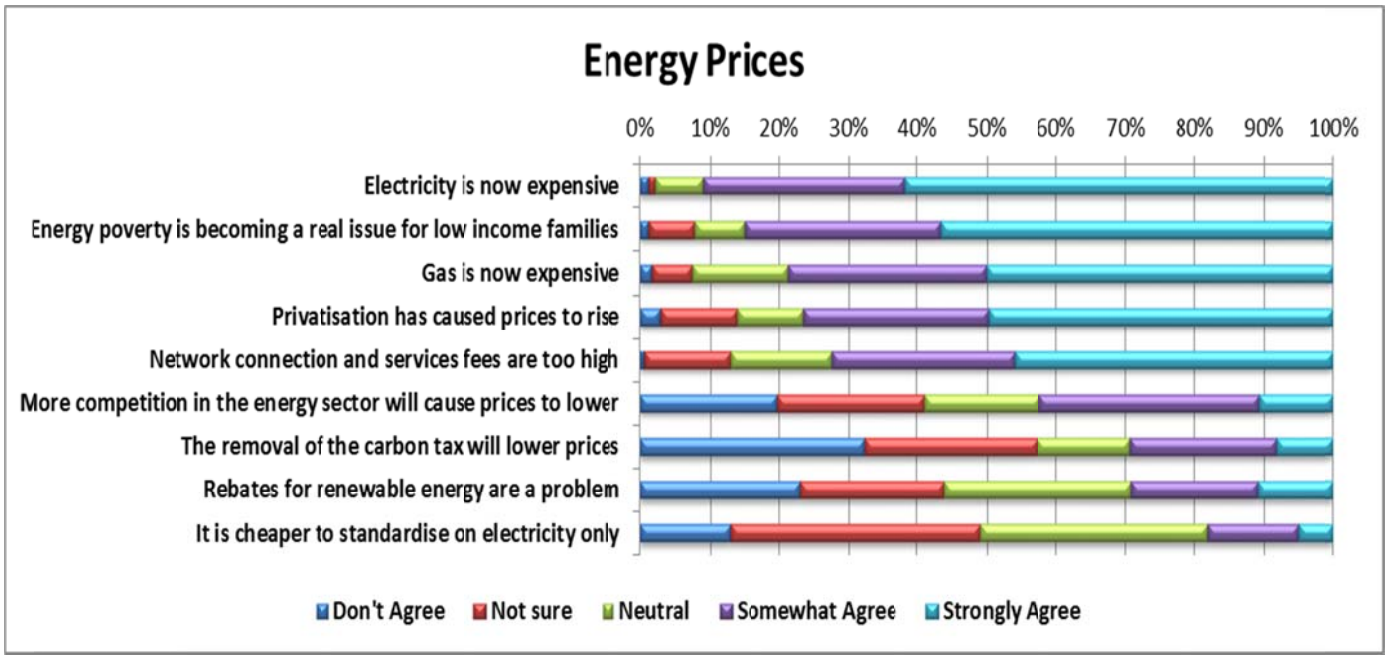
	Energy Star
Yes - important to me	82.3%
Yes - but not important to me	11.4%
No - but would like to / intend to	3.6%
No - don't know how to do this	1.3%
No - not important to me	1.3%



37. Please provide your thoughts on energy prices

In general energy prices are considered to be high, and that further privatisation will see energy prices increase. There was a high level of scepticism in the survey that prices would be reduced through the abolition of the carbon tax.

	Don't Agree	Not sure	Neutral	Somewhat Agree	Strongly Agree
Electricity is now expensive	1.3%	1.0%	6.8%	29.3%	61.8%
Energy poverty is becoming a real issue for low income families	1.3%	6.5%	7.1%	28.5%	56.6%
Gas is now expensive	1.8%	5.7%	13.9%	28.6%	50.1%
Privatisation has caused prices to rise	2.9%	10.9%	9.6%	26.8%	49.8%
Network connection and services fees are too high	0.6%	12.3%	14.6%	26.5%	46.0%
More competition in the energy sector will cause prices to lower	19.7%	21.4%	16.4%	31.9%	10.6%
The removal of the carbon tax will lower prices	32.2%	25.0%	13.4%	21.1%	8.2%
Rebates for renewable energy are a problem	23.0%	20.9%	27.0%	18.3%	10.9%
It is cheaper to standardise on electricity only	12.8%	36.2%	33.1%	12.9%	5.0%



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APPENDIX 1: THE SURVEY QUESTIONS

COTA Residential Energy Usage Survey 2014

THE POWER OF CHOICE: WHAT ARE THE POSSIBILITIES FOR OLDER CONSUMERS

COTA is undertaking this survey to build its capacity to represent the interests of its members in relation to energy policy, and to be able to advise its members on their energy use.

It may be helpful to gather copies of your electricity and gas bills, if they are readily available, before you start the survey.

Thank you for agreeing to fill in the survey on residential energy use.

Unlike some surveys, questions are not compulsory – you can move on even if you haven't answered a question. But please do your best to complete all questions.

Thanks again!

1. Please tell us your age bracket:

- ◯ Under 50
- ◯ 50-59
- ◯ 60-69
- ◯ 70-79
- ◯ 80 or over

2. Please tell us your employment status:

- ◯ Full-time
- ◯ Part-time
- ◯ Not employed
- ◯ Student
- ◯ Retired
- ◯ Self-employed

3. Please tell us your education level:

- ◯ School only
- ◯ Higher Education (Vocational Education and Training, TAFE, some tertiary, etc.)
- ◯ Tertiary degree

4. Please tell us your gender:

- ◯ Male
- ◯ Female

5. How many adults (16 and over) and children (under 16) are in your household (you included)?

Adults (16 and over) _____

Children (under 16) _____

6. What is your postcode?

Postcode _____

7. What best describes your home?

- ◯ Living with family member/s in their home
- ◯ Rented
- ◯ Being paid off
- ◯ Fully owned
- ◯ Timeshare within a retirement complex

8. Which of the following best describes your dwelling?

- ◯ A stand-alone house
- ◯ A flat / apartment
- ◯ A townhouse or terrace

9. Please tell us your annual household income before tax:

- ◯ I'd rather not say
- ◯ Below $26K
- ◯ $26K-$52K
- ◯ $52K-$78K
- ◯ $78K-$104K
- ◯ $104K - $130K
- ◯ Over $130K

COTA Residential Energy Usage Survey 2014

10. To what extent do you agree with the following statements?

	Don't Agree	Unlikely	Neutral	Most likely	Strongly Agree
Climate change is a major problem **to the planet**	◯	◯	◯	◯	◯
Climate change is a major problem **to me and my family**	◯	◯	◯	◯	◯
Climate change is caused by human activity	◯	◯	◯	◯	◯
Saving energy not only helps reduce greenhouse gases and tackle climate change - it can also save me money	◯	◯	◯	◯	◯
I would be willing to spend more for my energy if I knew the money was being used to tackle climate change and source renewable energy	◯	◯	◯	◯	◯
Australia has the ability to be a global leader on climate change	◯	◯	◯	◯	◯

11. Do you believe that the following groups are supportive enough in helping conserve our energy resources?

	No idea	Ignoring the issue	Not Enough	About OK	Excellent Job
My local government	◯	◯	◯	◯	◯
My state government	◯	◯	◯	◯	◯
Federal government	◯	◯	◯	◯	◯
My energy utility	◯	◯	◯	◯	◯
The energy industry generally	◯	◯	◯	◯	◯
My household	◯	◯	◯	◯	◯
My community	◯	◯	◯	◯	◯
COTA (or other membership groups)	◯	◯	◯	◯	◯
Society as a whole	◯	◯	◯	◯	◯

12. What is your level of support for greater use of the following power sources?

	Strongly against	Against	Neutral / don't care	In favour	Strongly in favour
Solar Power	◯	◯	◯	◯	◯
Wind Power	◯	◯	◯	◯	◯
Green Power (incl hydro, methane and others)	◯	◯	◯	◯	◯
Clean Coal	◯	◯	◯	◯	◯
Nuclear Energy	◯	◯	◯	◯	◯

13. What energy sources does your household use? (Check all that apply)

- [ ] Wood heater
- [ ] Mains electricity
- [ ] Electricity generator
- [ ] Mains gas
- [ ] Bottled gas (as mains substitute – NOT small BBQ-type bottles)
- [ ] Solar (for supplying power – NOT solar hot water)

14. What type of water heater does your household use? (Check all that apply)

- [ ] Combustion stove
- [ ] Electric storage (on demand, not linked to off-peak power)
- [ ] Electric storage (linked to off-peak power)
- [ ] Electric instantaneous
- [ ] Gas storage
- [ ] Gas instantaneous
- [ ] Solar
- [ ] Heat pump

15. Which of the following heating and cooling technologies are used in your household (check all that apply)?

- [ ] Electric heater (built-in or portable)
- [ ] Radiator panels
- [ ] In-slab/floor heating
- [ ] Open fire or wood-burning heater
- [ ] Gas heater (ducted, wall unit, or portable – with bayonet plug-in)
- [ ] Oil heater
- [ ] Ducted air conditioning
- [ ] Reverse cycle air conditioning
- [ ] Air conditioner (wall mounted or stand-alone)
- [ ] Ceiling and pedestal fans
- [ ] Natural ventilation

16. What fuel source do you use for cooking?

- ◯ Electric
- ◯ Gas
- ◯ Combination of gas and electric

17. When considering your household energy payments -

	No	Yes
Are you the person responsible for paying your energy bills?	◯	◯
Do you usually pay your bills on time?	◯	◯
In the past 2 years, have you had difficulty paying an energy bill?	◯	◯

18. When considering your household energy bills? Would you ...

	No	Perhaps	Yes
be interested to pre-pay your energy bills?	◯	◯	◯
be interested to get a combined energy bill (if you use both electricity and gas)?	◯	◯	◯
like the ability to contract for a year's worth of electricity or gas at a fixed price?	◯	◯	◯

19. How frequently do you currently receive and pay your energy bills?

	Monthly (pre-paid)	Monthly (post paid)	Bi-monthly	Quarterly	Pre-paid meter	Included in your rent
Electricity	◯	◯	◯	◯	◯	◯
Gas	◯	◯	◯	◯	◯	◯

20. How frequently would you like to pay your energy bills?

	Weekly	Fortnightly	Monthly	Bi-monthly	Quarterly
Electricity	◯	◯	◯	◯	◯
Gas	◯	◯	◯	◯	◯

21. What is the average amount of each energy bill you receive?

	Don't know	Regularly in credit	Less than $250	$250- $500	$500- $750	$750-$1000	Over $1000
Electricity (Summer)	◯	◯	◯	◯	◯	◯	◯
Electricity (Spring/Autumn)	◯	◯	◯	◯	◯	◯	◯
Electricity (Winter)	◯	◯	◯	◯	◯	◯	◯
Gas (Summer)	◯	◯	◯	◯	◯	◯	◯
Gas (Spring/Autumn)	◯	◯	◯	◯	◯	◯	◯
Gas (Winter)	◯	◯	◯	◯	◯	◯	◯

22. Are you, or have you ever, taken part in any of the following payment assistance schemes?

	Don't know	Are you eligible?	Are you receiving?
Annual electricity concession	☐	☐	☐
Excess electricity concession	☐	☐	☐
Medical-related concessions	☐	☐	☐
Hardship programs	☐	☐	☐
Retailer provided payment plans	☐	☐	☐

23. How do you think your household's energy consumption **PER PERSON** compares with the average Australian household?

	We consume a lot less	We consume a little less	We consume an average amount	We consume a little more	We consume a lot more
Electricity	◯	◯	◯	◯	◯
Gas	◯	◯	◯	◯	◯

24. How closely do you look at your energy bills?

Tick all that apply

- ☐ Usually don't look closely at it - just pay the bill
- ☐ Sometimes compare the bill with last year or last bill
- ☐ Usually or always compare the bill with last year or last bill
- ☐ Compare the bill with average user usage data provided by the utility
- ☐ Closely study my bills and look at my consumption patterns

25. What is your level of knowledge about these new technologies?

	Never heard of it	Heard of it, no more	Some knowledge	Know quite a bit	Know a lot
Smart metering (the technology)	◯	◯	◯	◯	◯
Smart metering (plans for my area)	◯	◯	◯	◯	◯
The "Smart Grid"	◯	◯	◯	◯	◯
Time-of-use (TOU) and flexible tariffs	◯	◯	◯	◯	◯
Energy storage batteries	◯	◯	◯	◯	◯
Off-grid options	◯	◯	◯	◯	◯
In-home display monitors	◯	◯	◯	◯	◯
Retailer provided usage web portals	◯	◯	◯	◯	◯

26. How important is each of the following to you?

	Don't know	Not at all important	Neutral	Somewhat important	Very Important
Save the household money	◯	◯	◯	◯	◯
Reduce the overall usage of energy	◯	◯	◯	◯	◯
Increase the overall efficiency of energy usage	◯	◯	◯	◯	◯
Increased visibility of energy consumption to the household	◯	◯	◯	◯	◯
The reliability and quality of supply	◯	◯	◯	◯	◯
The ability to better control the usage of individual devices in the household	◯	◯	◯	◯	◯

27. Do you personally do any of the following to conserve energy?

	Never thought of it	Too hard or too inconvenient	Should do but don't	Do it a bit	Do it a lot
Turn off PCs overnight or when not in use	◯	◯	◯	◯	◯
Turn off devices at wall when not in use to save stand-by power	◯	◯	◯	◯	◯
Take shorter showers	◯	◯	◯	◯	◯
Turn light switches off more	◯	◯	◯	◯	◯
Hang the washing on the line	◯	◯	◯	◯	◯
Change cooking methods	◯	◯	◯	◯	◯
Use air conditioning less	◯	◯	◯	◯	◯
Leave appliances turned off except when required	◯	◯	◯	◯	◯
Use heating less	◯	◯	◯	◯	◯

28. What methods and options are you using to reduce your energy bills?

	Never thought of it	Too hard or too inconvenient	Should do but don't	Do it a bit	Do it a lot
Check energy star ratings for appliance efficiency	◯	◯	◯	◯	◯
Replace old appliances	◯	◯	◯	◯	◯
Replace light bulbs with low energy light bulbs	◯	◯	◯	◯	◯
Install insulation/double glazing &/or lined curtains	◯	◯	◯	◯	◯
Undertake a home energy audit and follow recommendations	◯	◯	◯	◯	◯
Use microwave more often to heat food	◯	◯	◯	◯	◯
Take advantage of off-peak times for home amenities (eg cooking/washing) (where available)	◯	◯	◯	◯	◯

Please specify any other techniques you use to conserve energy or reduce your bills.

29. Do you have a choice for your energy retailers?

	No	Not sure	Yes
Electricity	◯	◯	◯
Gas (if applicable)	◯	◯	◯
In the past 2 years have you switched an energy retailer?	◯	◯	◯

30. What might put you off switching energy retailer?

- ☐ Never thought about it
- ☐ Don't know where to start
- ☐ Rates too confusing
- ☐ They are essentially all the same
- ☐ I need an incentive or bonus
- ☐ It's too hard

31. How important are the following aspects of your local energy industry?

	Don't know	Not at all important	Neutral	Somewhat important	Very Important
Support local amenities and charities	◯	◯	◯	◯	◯
Sponsor local sports teams	◯	◯	◯	◯	◯
Recognisable brand	◯	◯	◯	◯	◯
Undertake good vegetation management	◯	◯	◯	◯	◯
Beautify any local infrastructure	◯	◯	◯	◯	◯
Provide underground cabling where practical (for electricity)	◯	◯	◯	◯	◯
Respectful of easements and access rights	◯	◯	◯	◯	◯

32. How much would you be prepared to spend on energy-related home improvements or renovations to cut your annual energy bills by one-third?

- ◯ Not prepared to spend anything
- ◯ No more than $1000
- ◯ $1000 to $5000
- ◯ $5000 to $10,000
- ◯ More than $10,000

33. How important to you are the following as sources of advice and information on saving and conserving energy in the home?

	Don't know	Not at all important	Neutral	Somewhat important	Very Important
Media – TV and radio	◯	◯	◯	◯	◯
Media – newspapers, books and magazines	◯	◯	◯	◯	◯
Internet	◯	◯	◯	◯	◯
Local electrician	◯	◯	◯	◯	◯
Local hardware store	◯	◯	◯	◯	◯
Groups and Clubs (e.g. COTA)	◯	◯	◯	◯	◯
My electricity / gas supplier	◯	◯	◯	◯	◯
Family and friends	◯	◯	◯	◯	◯
Local government	◯	◯	◯	◯	◯
State government	◯	◯	◯	◯	◯
Federal government	◯	◯	◯	◯	◯

COTA Residential Energy Usage Survey 2014

There are various schemes in operation around Australia to encourage people to use or install energy-saving features.

34. How familiar are you, and have you used, any of the following energy schemes?

	Never heard of it	Heard of it, but not used it	Have used it
Home Insulation rebate	◯	◯	◯
Solar panel rebate	◯	◯	◯
Home energy audit	◯	◯	◯
Green Loans Scheme	◯	◯	◯

35. If you have not taken part in any schemes, why not? (check all that apply)

- ☐ Haven't heard of them
- ☐ Chose not to do anything
- ☐ Wanted to but schemes were stopped before I could
- ☐ Too much trouble / don't have time
- ☐ Too much paperwork
- ☐ We are already efficient in our use of energy
- ☐ We are renting – landlord's responsibility
- ☐ Can't afford it – need to spend money upfront to get money back later
- ☐ I don't believe in rebates – people should pay their own way

36. Have you ever used the Energy Star rating to buy energy-efficient products?

- ◯ No – don't know how to do this
- ◯ No – not important to me
- ◯ No – but would like to / intend to
- ◯ Yes – but not important to me
- ◯ Yes – important to me

37. Please provide your thoughts on energy prices?

	Don't Agree	Not sure	Neutral	Somewhat Agree	Strongly Agree
Electricity is now expensive	◯	◯	◯	◯	◯
Gas is now expensive	◯	◯	◯	◯	◯
The removal of the carbon tax will lower prices	◯	◯	◯	◯	◯
Privatisation has caused prices to rise	◯	◯	◯	◯	◯
More competition in the energy sector will cause prices to lower	◯	◯	◯	◯	◯
Rebates for renewable energy are a problem	◯	◯	◯	◯	◯
Energy poverty is becoming a real issue for low income families	◯	◯	◯	◯	◯
It is cheaper to standardise on electricity only	◯	◯	◯	◯	◯
Network connection and services fees are too high	◯	◯	◯	◯	◯

38. How important would each of the following factors be in influencing you to change your energy retailer?

	Don't know	Not at all important	Neutral	Somewhat important	Very Important
More information about the options	◯	◯	◯	◯	◯
Lower price and rebates	◯	◯	◯	◯	◯
No connection fees	◯	◯	◯	◯	◯
Time-of-use and flexible tariffs	◯	◯	◯	◯	◯
Knowledge that supplier uses Green Power	◯	◯	◯	◯	◯
Supplier community engagement	◯	◯	◯	◯	◯
A supplier I can trust	◯	◯	◯	◯	◯
Advice from family and friends	◯	◯	◯	◯	◯
Direct marketing campaigns	◯	◯	◯	◯	◯

39. Thanks for your help! Are there any other comments you would like to make on any of the issues raised in this survey?

Thank you very much for participating in our survey. Now press "Done"