

Quantum
Market
Research

Stakeholder Research 2021

Prepared for Energy Safe Victoria

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Executive summary

Overall, familiarity with ESV was high, although as might be expected, stakeholders tended to be most familiar with ESV's roles that directly related to them. There were some clear differences in perceptions between stakeholder groups, with electricians the least positive in their evaluations of ESV.



While ESV **performs reasonably well** in its role as a regulator, there are clear opportunities for improvement. Just six in ten (59%) electricians were totally or very confident that **ESV's activities effectively minimise risks** in the electricity and gas pipeline industries as far as practicable, whereas this figure was much higher among gasfitters (69%).

Electricians' relatively lower scores may reflect a lack of confidence in the current systems, or could be a communication issue, with **stakeholders unclear about or unaware of the many activities that ESV undertakes** in pursuit of this goal.

Key Driver Analysis showed that both **electricians' and gasfitters'** overall confidence in ESV was largely driven by perceptions of whether **ESV's regulation activities are effective in keeping Victorians safe** and whether the **regulations imposed are appropriate**.

On both these statements, ESV performed well: 73% of electricians and 76% of gasfitters agreed **ESV's regulation activities are effective in keeping Victorians safe** and 76% of electricians and 81% of gasfitters agreed that the regulations imposed are appropriate.

A clear area of concern was in relation to perceptions that **ESV makes good use of the data it holds**. Only 37% of electricians and 44% of gasfitters agreed with that statement, and could indicate stakeholders are unaware of what data ESV holds on them and the industry as a whole, and how it is being used to minimise risk in the industry.

The relationship ESV has with **electricians** appears to be more contentious than with gasfitters. Fundamental to this is the fact that electricians are significantly less likely than gasfitters to feel that **ESV treats them with respect** (63% of electricians agreed, vs 82% of gasfitters), **works cooperatively with them to achieve ESV's objectives** (56%, vs 76%), or **acts with integrity** (60%, vs 77%).

However, there were some clear differences in perceptions of ESV between electricians licensed more recently versus those licensed for more than 5 years. Electricians who had been licensed for less than 5 years were significantly more likely to agree **ESV treats them with respect** (76%, vs 62% of those who had been licensed for longer than 5 years), and **works cooperatively with them to achieve ESV's objectives** (69%, vs 56%).

Key findings – electricians & gasfitters

Electricians

While most electricians were aware of ESV (95%) and its role in licensing workers (96%) and enforcing compliance with regulations and issuing certificates of electrical safety (94%), they tended to be less familiar with other aspects of ESV's role. They had a tendency to rate ESV relatively poorly in terms of overall performance, particularly in relation to treating them with respect (63%) and working cooperatively with them (56%), and acting with integrity (60%).

Just over half (56%) agreed that ESV conducts audits frequently enough to verify that they comply with their legislative requirements, and they tended to rate ESV more poorly than gasfitters did in terms of monitoring and auditing safety systems and practice, but were among the most likely to agree that ESV acts if negligence has been shown (73%). They were among the least likely to say it was difficult for them to comply with regulations (25%).

They were the most likely to agree that ESV raises public awareness of electrical safety in the home (71%).

Gasfitters

While most gasfitters were aware of ESV (98%) and its role in licensing workers (88%) and educating the community via public awareness campaigns and engaging with industry (87%), they tended to be less familiar with other aspects of ESV's role. This stakeholder group was among the most likely to feel confident that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable (69%), and tended to be more positive than electricians and appliance manufacturers in terms of their evaluation of ESV's overall performance, particularly in relation to treating them with respect (82%) and working cooperatively with them (76%), and acting with integrity (77%).

They tended to give significantly higher scores compared to electricians over most aspects of monitoring and auditing safety systems and safety practices, but were the least likely to agree that ESV effectively administers systems that maintain safety standards and skills of those working in the industry (47%).

They were the most likely to agree that ESV raises public awareness of safety issues with using gas (80%).

Stakeholder satisfaction indices

The satisfaction indices represent the average percentage of respondents who strongly/mildly agreed with each of the statements they are comprised of.

		Electricians	Gasfitters
General perceptions of ESV (Q9 index)	<ul style="list-style-type: none"> ESV is an independent regulator ESV regulates to a high standard The regulations imposed by ESV are appropriate ESV applies regulations fairly ESV applies regulations consistently 	71%	75%
How ESV treats stakeholders (Q14 index)	<ul style="list-style-type: none"> ESV treats you with respect ESV always acts with integrity ESV works cooperatively with you to achieve ESV's objectives ESV is accountable for its actions 	57%	73%
Ease of complying with regulations (Table of 11 index)	<ul style="list-style-type: none"> It's easy to get all the information I need to follow the regulations The advantages to my business of complying with licence conditions outweighs the cost incurred to meet these regulations ESV's regulation activities are effective in keeping Victorians safe If ESV noticed that I was non-compliant, they would have the power to make me do something about it Victorian electricians / gasfitters are likely to report other Victorian electricians / gasfitters to ESV if they were known to be breaching regulations ESV conducts audits frequently enough to verify that I adhere to the legislative requirements The enforcement action taken for non-compliance with the legislative requirements isn't strong enough to me from breaching the legislation It is difficult for me to comply with the regulations at times The regulations imposed by ESV are appropriate 	56%	58%

Stakeholder satisfaction dashboard

Objective	Success Indicator	Performance	
		Electricians (n=1,970)	Gasfitters (n=137)
Awareness (Q6) % yes	Before today, were you aware that Energy Safe Victoria (ESV) is responsible for the safety and technical regulation of electricity and electrical appliances, gas and pipelines/electricity and electrical appliances/gas and pipelines in Victoria?	95%	98%
	<hr/>		
Familiarity (Q8) % very / somewhat familiar	Licensing and registering workers	96% ↑	88%
	Approving safety plans for major industries	58%	66%
	Monitoring and auditing safety systems and safety practices	77%	80%
	Educating the community via public awareness campaigns and engaging with industry	78%	87% ↑
	Enforcing compliance with regulations and issuing certificates of electrical safety	94% ↑	83%
<hr/>			
Confidence in ESV (Q7) % totally/very confident	ESV's role is to regulate the electricity, gas and pipeline industries, to minimise safety risks and promote energy safety and efficiency. How confident are you that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable?	59%	69% ↑
<hr/>			
Overall performance of ESV (Q9 & Q14) % strongly/mildly agree	ESV is an independent regulator	67%	74%
	ESV regulates to a high standard	76%	79%
	ESV promotes energy safety within the industry	86%	83%
	ESV applies regulations fairly	68%	72%
	ESV applies regulations consistently	68%	70%
	Treats you with respect	63%	82% ↑
	Always acts with integrity	60%	77% ↑
	Works cooperatively with you to achieve ESV's objectives	56%	76% ↑
	Is accountable for its actions	49%	57%

Stakeholder satisfaction dashboard

Objective	Success Indicator	Performance	
		Electricians (n=1,970)	Gasfitters (n=137)
Educating the community via public awareness campaigns and engaging with industry (Q12) % strongly/mildly agree	ESV is effective in providing industry education	54%	61%
	ESV is effective in informing industry of changes to licensing or registration processes	64%	69%
	ESV raises public awareness of electrical safety in the home	71%	69%
	ESV raises public awareness of safety issues with using gas	64%	80% ↑
	ESV works cooperatively with other government departments to ensure consistency and alignment with cross-government policies and arrangements	38%	43%
Compliance with regulations (Q15) % strongly/mildly agree	It's easy to get all the information I need to follow the regulations	59%	66%
	The advantages of complying with licence conditions outweighs the cost incurred to meet these regulations	62%	59%
	ESV's regulation activities are effective in keeping Victorians safe	73%	76%
	If ESV noticed that we/I was non-compliant, they would have the power to make us/me do something about it	89%	90%
	Businesses/electricians/gasfitters are likely to report other Businesses/electricians/gasfitters to ESV if they were known to be breaching regulations	38%	31%
	ESV conducts audits frequently enough to verify that we/I adhere to the legislative requirements	56%	68% ↑
	The enforcement action taken for non-compliance with the legislative requirements isn't strong enough to stop us/me from breaching the legislative requirements	24%	20%
	It is difficult for my business/me to comply with the regulations at times	25%	29%
	The regulations imposed by ESV are appropriate	76%	81%
Enforcing compliance with regulations and issuing certificates of electrical safety (Q13) % strongly/mildly agree	ESV takes appropriate enforcement action (based on the severity of risk and harm)	68%	62%
	ESV acts if negligence has been shown	73% ↑	65%
	LOCAL GOVERNMENT, ELECTRICITY DISTRIBUTOR, ELECTRICIANS: ESV effectively enforces regulations for electrical works	72%	

Stakeholder satisfaction dashboard

Objective	Success Indicator	Performance	
		Electricians (n=1,970)	Gasfitters (n=137)
Monitoring and auditing safety systems and safety practices (Q11) % strongly/mildly agree	DISTRIBUTOR: ESV effectively audits compliance against approved safety cases		
	ESV effectively monitors compliance with standards and requirements	64%	76%
	ESV effectively audits compliance with standards and requirements	62%	74%
	ESV effectively enforces compliance with standards and requirements	69%	77%
	ESV auditors/assessors have sufficient technical competence and knowledge to assess the industry	61%	77%
	ESV collects appropriate data and information about me or my business	47%	55%
	ESV makes good use of the data it holds	37%	44%
	It is easy to provide ESV with the information it requires	61%	72%
Licencing and registering workers and approving safety plans for major industries (Q10) % strongly/mildly agree	ESV effectively administers systems that maintain safety standards and skills of those working in the industry	69%	73%
	ELECTRICIANS: ESV effectively licenses electricians	84%	
	ELECTRICIANS: ESV effectively registers electrical contractors and lineworkers	81%	
	ELECTRICIANS: ESV's licensing and registration process is straightforward	72%	
	ELECTRICITY DISTRIBUTOR: ESV effectively assesses and audits safety cases for major companies		
	PIPELINE LICENSEES, GASFITTERS: ESV effectively administers the gas acceptance scheme for complex installations		82%
	PIPELINE LICENSEES, GASFITTERS: ESV effectively ensures that gas and pipeline companies have accepted safety cases, construction safety cases and receive consent to operate		63%



About the research

Background & Objectives

Following on from the transformation of ESV to a Commission, there is greater need for a clear understanding as to how stakeholders view the regulatory actions, and the program of work delivered by ESV. Because of the breadth of ESV's responsibilities it interacts with a diverse range of stakeholders, defined to be the people and the organisations ESV work with, and for, on a day-to-day basis.

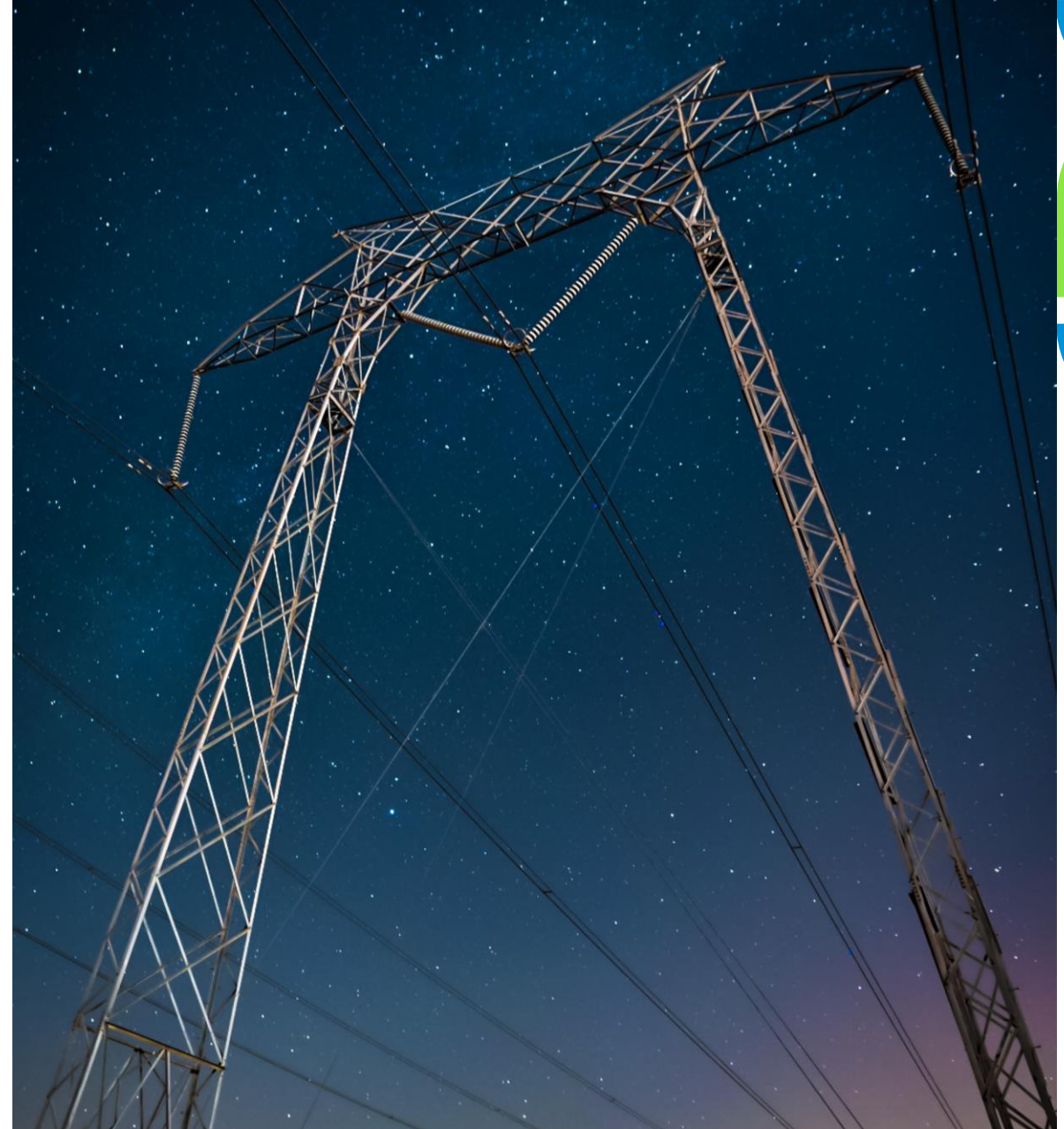
ESV's aim is to establish a regular feedback process to track stakeholder perceptions of ESV as a regulator.

While ESV has previously conducted research among stakeholder, this piece of research marks a new approach to surveying stakeholders and will form a benchmark against which future iterations of the research can be compared.

ESV is seeking to gain feedback from a diverse range of its stakeholders

The specific objectives of the research are to determine:

1. Overall performance of ESV achieving its objectives, and key areas of focus
2. Effectiveness of changes in the way ESV regulates (this will be addressed by future iterations of the research, as this round will form a baseline)
3. Stakeholder sentiment of ESV's technical capability, including a comparison of the specific issues affecting each stakeholder group.



Quantitative methodology



Online survey among stakeholders – sample provided by ESV



Fieldwork was conducted from 22nd March 2021 to 13th April 2021



Average survey length was 12 minutes



The data was not weighted, and is not reported at an overall level



No monetary incentives were provided for participation

Total sample size, n=2,241 (including additional audiences shown in the appendices)

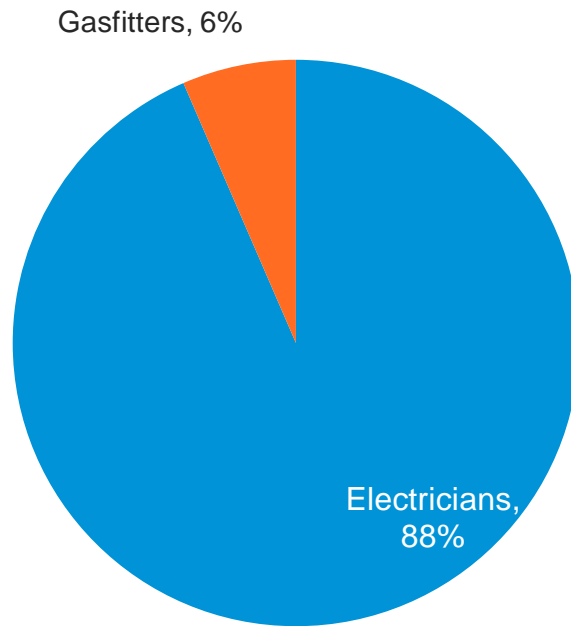
	Population *	Number of respondents n=	Unsubscribed	Bounced back	Response rate**	Maximum margin of error*** +/-
Total	51,687	2,241	551	2556	5%	N/A
Electricians	45,875	1,970	443	2413	5%	2.2%
Gasfitters	2,373	137	24	73	6%	8.1%

- ESV provided contact details (emails) for all stakeholder groups.
- The sample lists were deduplicated (i.e. where the same email address appeared multiple times, additional entries were eliminated).
- Response rates were relatively low among electricians and gasfitters.
- Where significance testing has been shown, results are significant at the 95% significance level.
- We have avoided providing overall results across all respondent groups, as electrician represent the largest stakeholder group (91% of all stakeholder contacts), and their results would skew those from all other stakeholder groups.
- The project was carried out in line with the Market Research International Standard, AS ISO 20252.

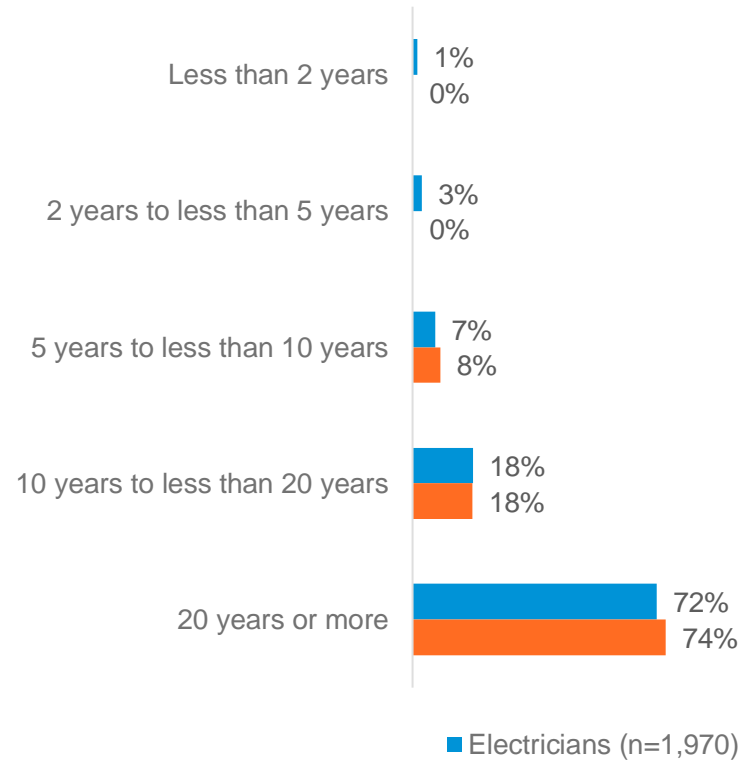
*Total number of unique contacts provided by ESV

** Number of respondents divided by (population minus bounce backs)

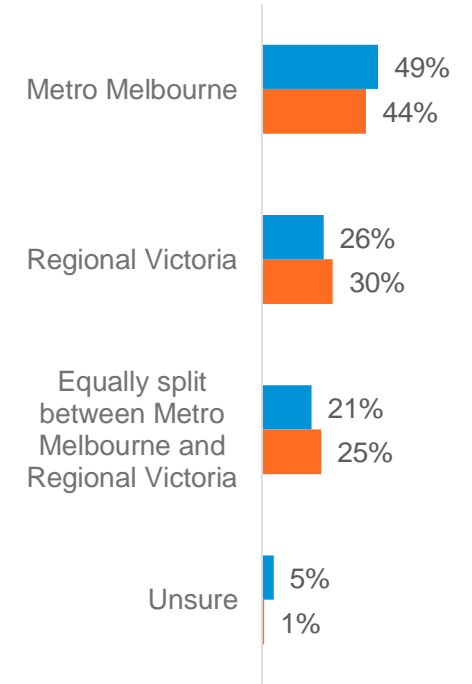
Sample profile



Length of time working as an electrician/gasfitter



Location of majority of work



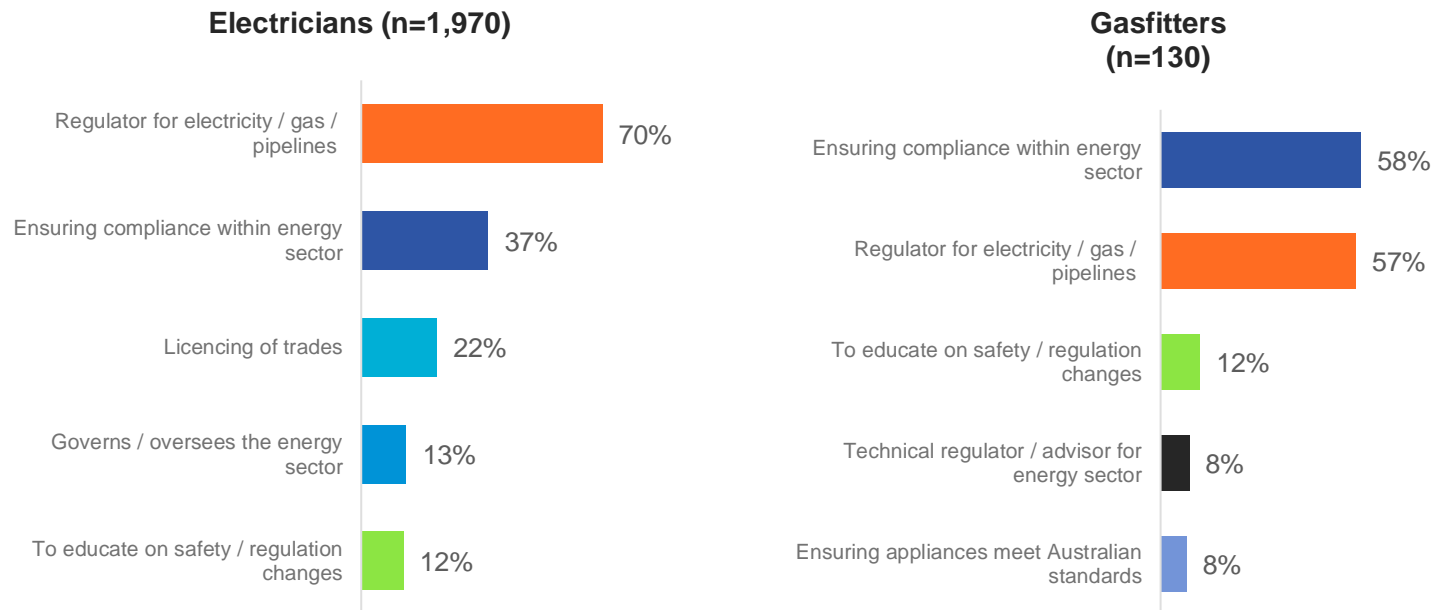


Detailed findings

Both stakeholder groups tend to see regulation and ensuring compliance as key roles of ESV

Top 5 roles attributed to ESV by stakeholder group

Base: All respondents



Q5 - What do you understand Energy Safe Victoria's (ESV) role to be?

Although not within the top 5 roles attributed to ESV, a higher proportion of electricians licensed for less than 5 years spontaneously identified ESV as a provider of certification (7%, compared to 3% of all electricians). A larger proportion of electricians licensed for 10+ years were more likely to spontaneously mention something negative about ESV (4%, compared to 1% of those licensed for less than 10 years).

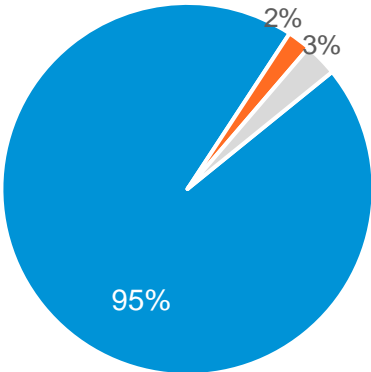
Among gasfitters from metro Melbourne, 71% were familiar with ESV's role as auditor (significantly more than 58% of all gasfitters). A significantly higher proportion of metro gasfitters mentioned that ESV was a governing body of the Energy sector in Victoria (12% compared to 7% of all gasfitters). 11% of regional gasfitters offered a negative comment (e.g. about bureaucracy) compared to 4% of gasfitters as a whole.

The vast majority of all electricians and gasfitters were aware of ESV's regulatory role

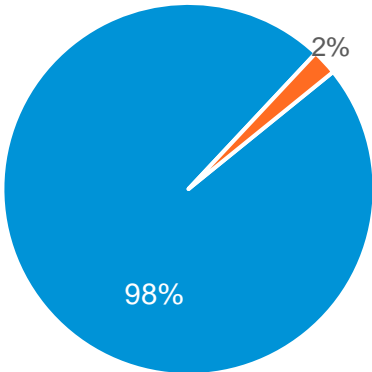
Awareness of ESV's regulatory responsibility

Base: All respondents

Electricians (n=1,970)



Gasfitters (n=137)



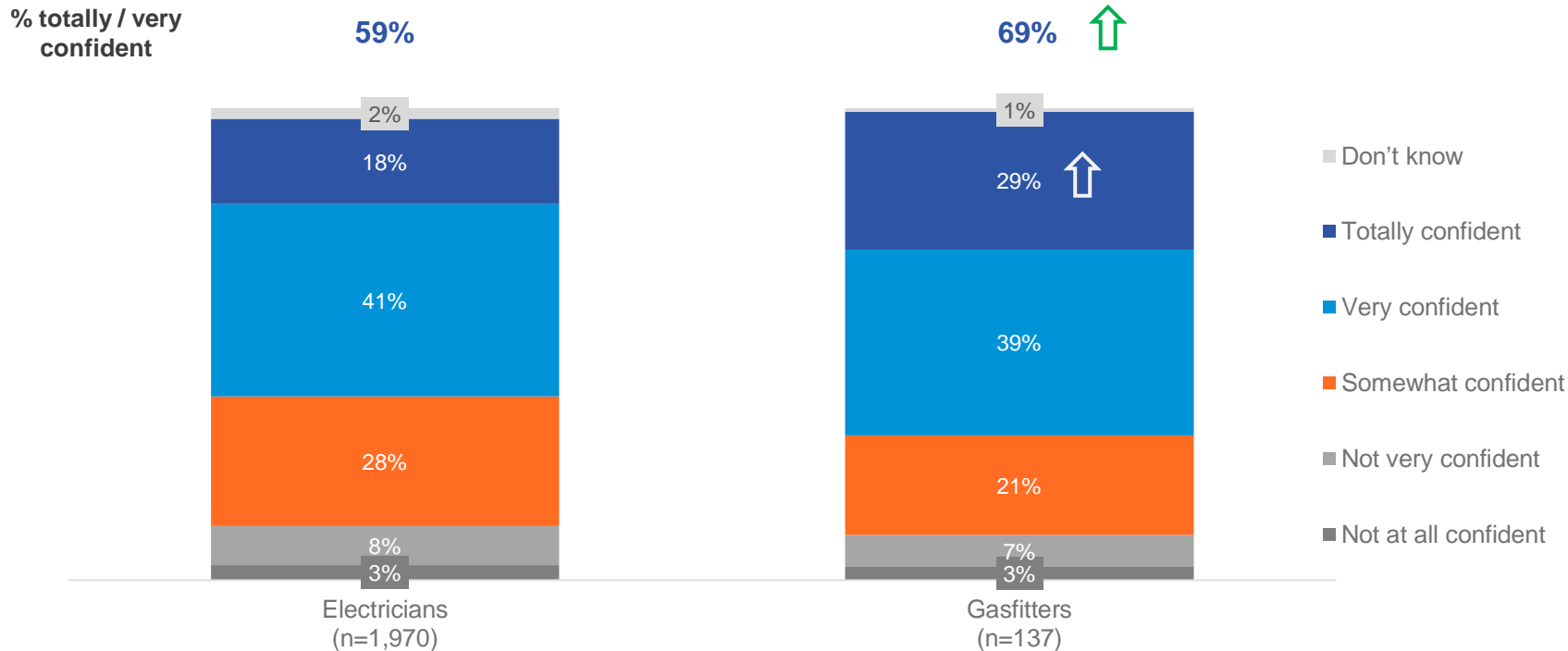
There were no significant differences by demographic or firmographic characteristics.

Q6 - Before today, were you aware that ESV is responsible for the safety and technical regulation of electricity and electrical appliances, gas and pipelines?

Approximately 2/3 electricians (59%) and gasfitters (69%) were totally/very confident that ESV's activities minimise risks

Confidence that ESV's activities minimise risks in the electricity and gas pipeline industries as far as practicable

Base: All respondents



Gasfitters were the most likely of any stakeholder group to express total confidence in ESV (29%), with no significant differences between gasfitters by demographics.

A higher proportion of electricians who had been licensed for less than 5 years were totally/very confident (72%) in ESV than those who had been working for more than 5 years (58%). 4% of electricians who conduct the majority of their work in regional Victoria were not confident at all, compared to 2% of those who work in metro Melbourne.

Q7 - How confident are you that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable?

Indicates significant difference from total

Assessing organisations' attitudes to compliance: Table of Eleven

- To assess a business's level of compliance with legislation, a series of questions were included based around the 'Table of Eleven', originally developed by the Dutch Ministry of Justice in 2004.
- The Table of Eleven is a model based on behavioural science, consisting of eleven dimensions. Together, these dimensions are decisive in determining the level of compliance with legislation.
- Key questions were asked within the survey to determine current attitudes to, and to improve compliance.

Quantum has successfully used the 'Table of Eleven' framework with a number of regulators in Victoria, including Dairy Food Safety Victoria, EPA Victoria and WorkSafe Victoria.

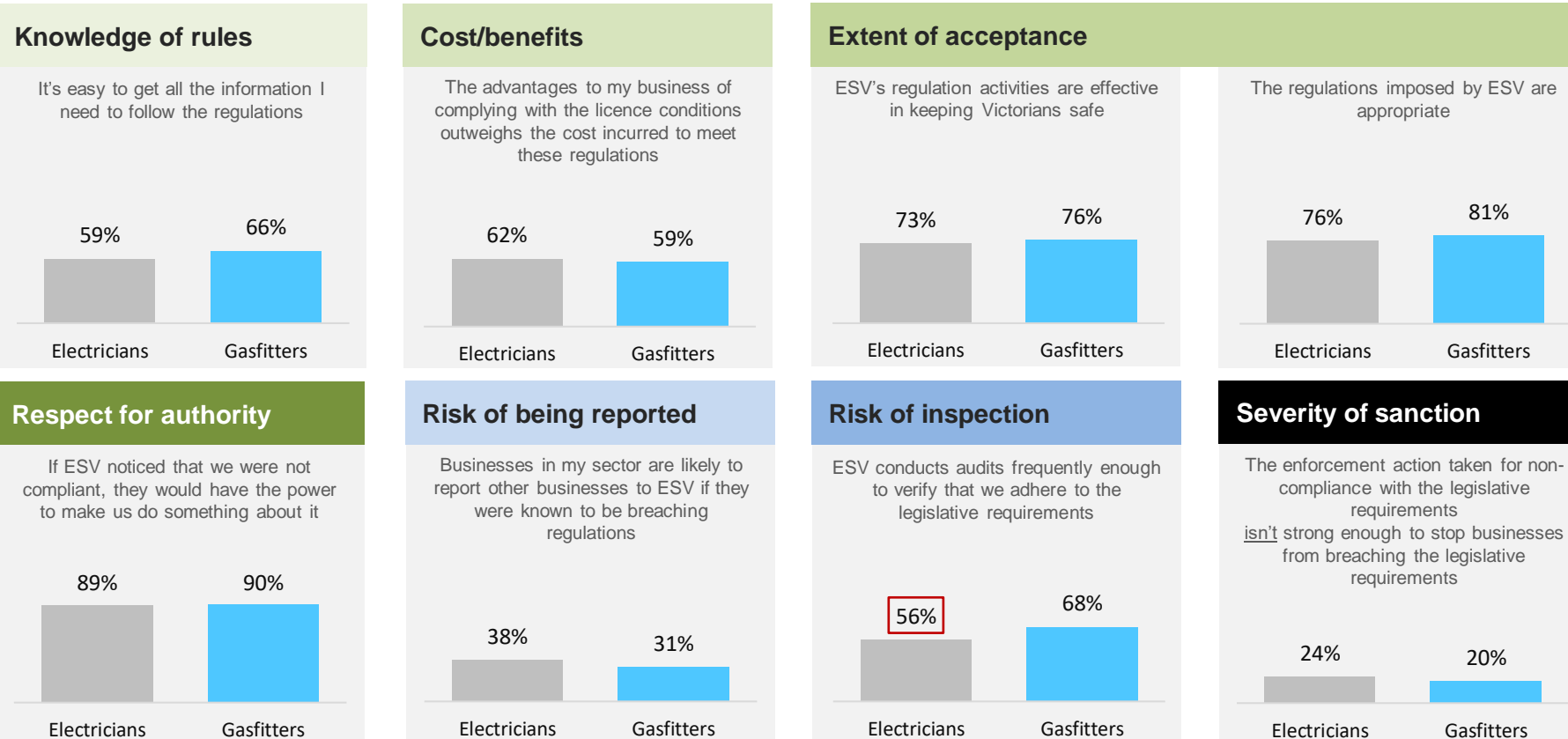
Outcomes of research using this framework have helped organisations understand their licensees' attitudes towards compliance with regulations, has helped shape risk-based regulation strategies among these modern regulators.



Electricians were less likely to feel ESV audits frequently enough to verify adherence to legislation

Attitudes towards compliance (% strongly / mildly agree)

Base: Electricians (n=1970); Gasfitters (n=137)



Electricians who mainly work in metro Melbourne were significantly more likely to believe sanctions were not severe enough (26%, compared to 21% of electricians who mainly work regionally).

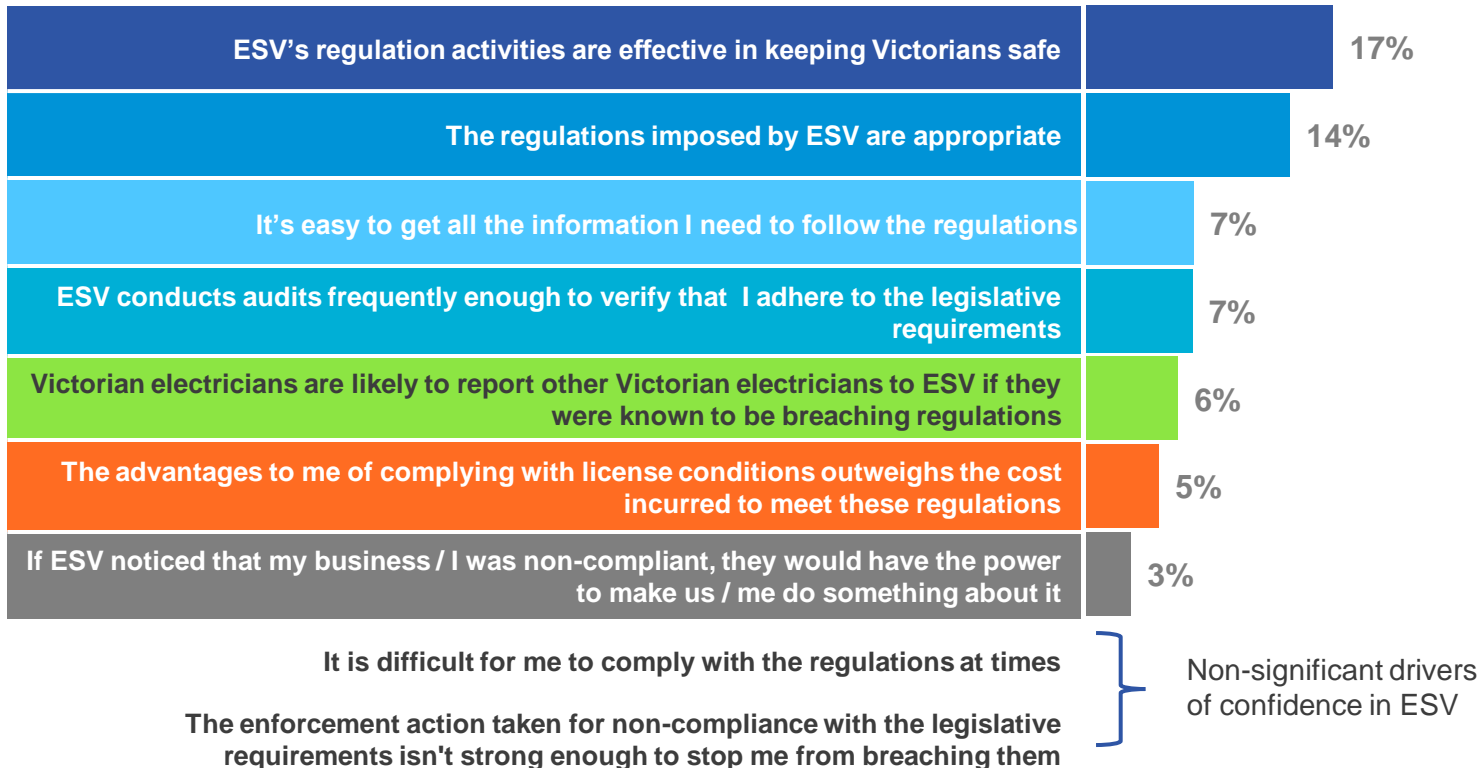
Electricians licensed within the last 5 years were significantly more likely to agree the advantages of regulation outweigh the cost (69%, vs 62% of those licensed for more than 5 years), and that there was a risk of being reported (45%, compared to 38% of those who have been licensed for more than 5 years).

There were no significant differences in attitudes among gasfitters.

Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

Key Driver Analysis – Electricians

Drivers of confidence that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable



Base: Electricians who gave valid responses (excluding don't know) to all items in the analysis, minus 5% outliers; n=1,368

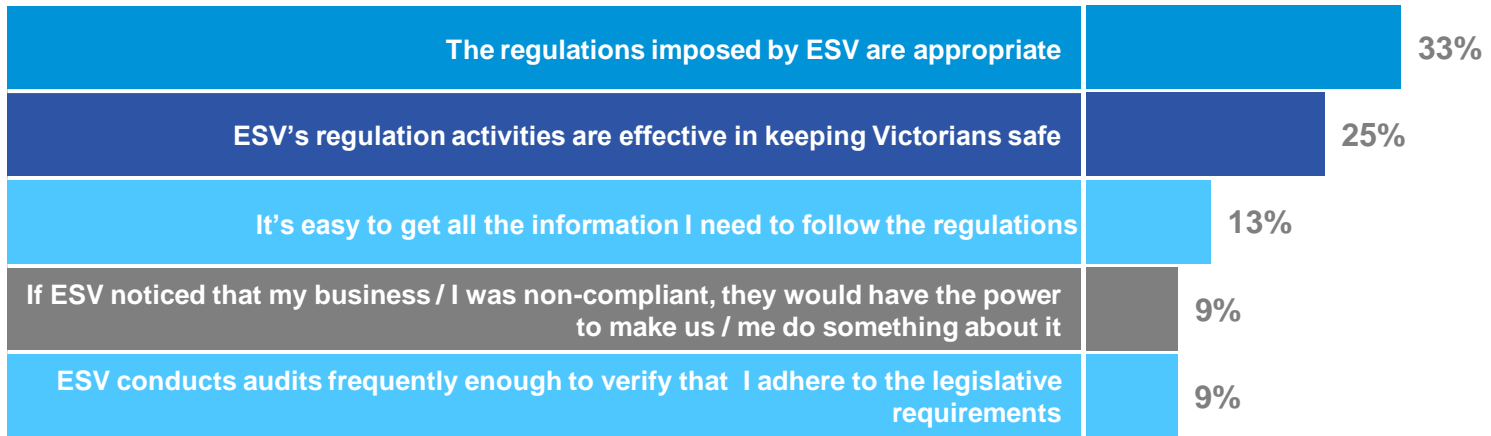
The Key Driver Analysis showed that the following had the greatest contribution to electricians' confidence in ESV:

- ESV's regulation activities being effective in keeping Victorians safe was the most important driver (contributes 17% to confidence).
- The regulations imposed by ESV being perceived as appropriate was the secondary driver (contributes 14% to confidence).
- Ease of getting information needed to follow the regulations and ESV conducting audits frequently enough to verify adherence to regulations were the tertiary drivers (contribute 7% respectively to overall confidence overall).
- There were no clear differences in drivers between electricians who had been in the industry for a shorter period of time (i.e. less than 10 years) versus those who had been working longer (10+ years).

The key driver analysis was conducted using Relative Importance Analysis, removing the 5% greatest outliers and excluding missing values. The adjusted R square value was .60, indicating that 60% of the variance in explaining electricians' confidence in ESV was explained by this analysis.

Key Driver Analysis – Gasfitters

Drivers of confidence that ESV’s activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable



The advantages to me of complying with license conditions outweighs the cost incurred to meet these regulations
 Victorian gasfitters are likely to report other Victorian gasfitters to ESV if they were known to be breaching regulations
 It is difficult for me to comply with the regulations at times
 The enforcement action taken for non-compliance with the legislative requirements isn’t strong enough to stop me from breaching them

Non-significant drivers of confidence in ESV

The Key Driver Analysis showed that the following had the greatest contribution to gasfitters’ confidence in ESV:

- The regulations imposed by ESV being perceived as appropriate was the most important driver (contributes 33% to confidence).
- ESV’s regulation activities being effective in keeping Victorians safe was the secondary driver (contributes 25% to confidence).
- Ease of getting information needed to follow the regulations was the tertiary driver (contributes 13% to overall confidence overall).

The key driver analysis was conducted using Relative Importance Analysis, removing the 5% greatest outliers and excluding missing values. The adjusted R square value was .70, indicating that 70% of the variance in explaining electricians’ confidence in ESV was explained by this analysis.

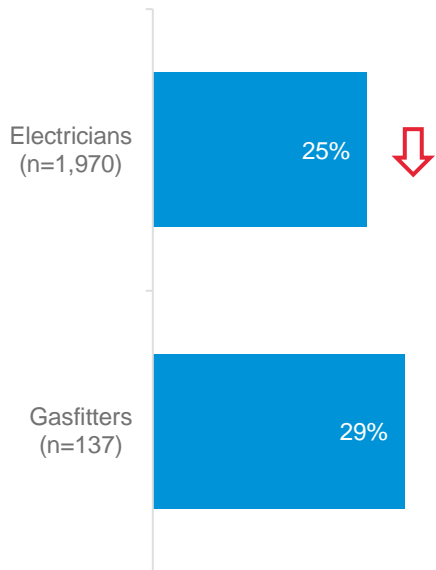
Base: Gasfitters who gave valid responses (excluding don’t know) to all items in the analysis, minus 5% outliers; n=99

Ambiguous rules and too many regulations were key reasons for difficulty complying with regulations

Difficulty complying with regulations

Base: All respondents

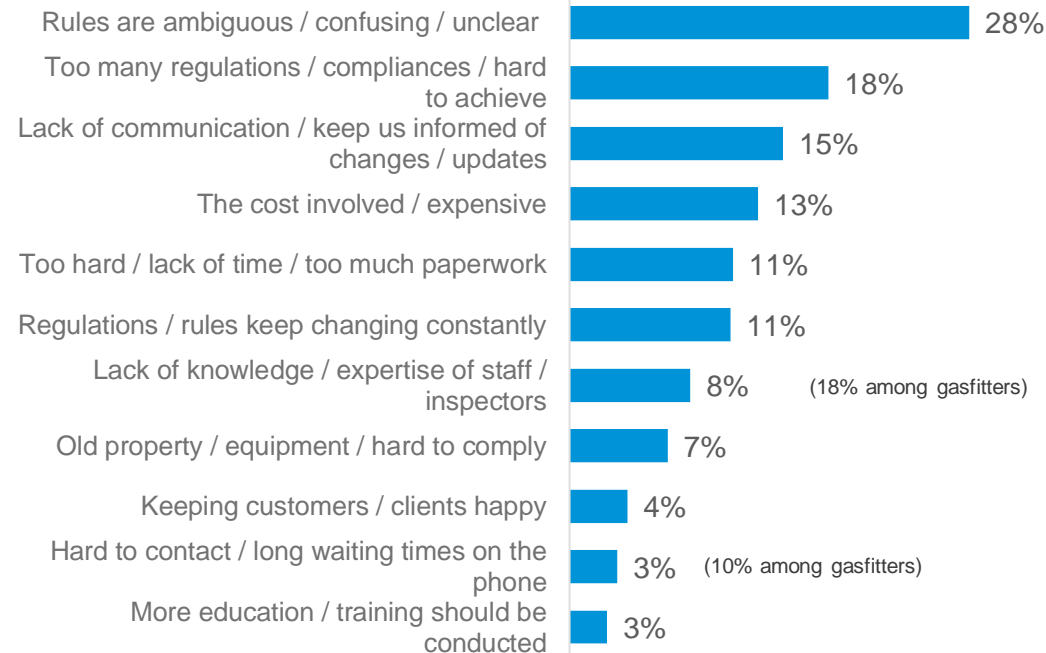
It is difficult for my business/me to comply with the regulations at times



Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

Base: Those who agreed it was difficult for them or their business to comply with regulations at times; n=573

Reasons for difficulty complying – among those who said it was sometimes difficult



Q16 - You indicated that it is difficult for your organisation/your business/you to comply with the regulations at times. Please tell us in as much detail as possible why it is difficult to comply with the regulations. Responses asked open ended and coded. Only responses at or above 3% shown.

Response patterns did not differ significantly between electricians and gasfitters, with the exception that gasfitters were more likely to mention lack of knowledge or expertise of ESV staff or inspectors (18%), and to say ESV was hard to contact, with long waiting times on the phone (10%).

See next slide for some verbatim comments explaining reasons for difficulty in complying with regulations.

Indicates significant difference from total

In stakeholders' own words (relating to difficulty complying)...

Because the "RULES" that we're supposed to know and follow are set out in each copy of the appropriate "standards" that are WAY TOO BLOODY EXPENSIVE!! For the Sole Trader it is pretty difficult to keep up with it all when you're offered a job that the cost to buy the correct standard blows your profit margin out of the water, so you're forced to do only bread and butter stuff. Then you don't bother buying the standard when you miss out on the job because it won't come up again for ages.

Electrician

Numerous Regulatory and Australian Standards changes - not clearly communicated via detailed explanation in ESV's publication.

Electrician

I do not always have control over what others do or the customers decisions when I am not present. There are many factors that come into play and whilst I believe I make every effort and my intentions are to comply as the licensed person I am totally responsible. There are also some very clear "grey" areas in the real world, but when we refer to the standards they are black and white. Examples would be negative pressure testing and what occurs if negative pressure is detected. The requirement for servicing by Type A approved gasfitters, this is not controlled and there are insufficient people to maintain the industry as it is currently legislated.

Gasfitter

Some Gas regulations are written in a way that are hard to understand. Some regulations, I believe are out-dated and not practical.

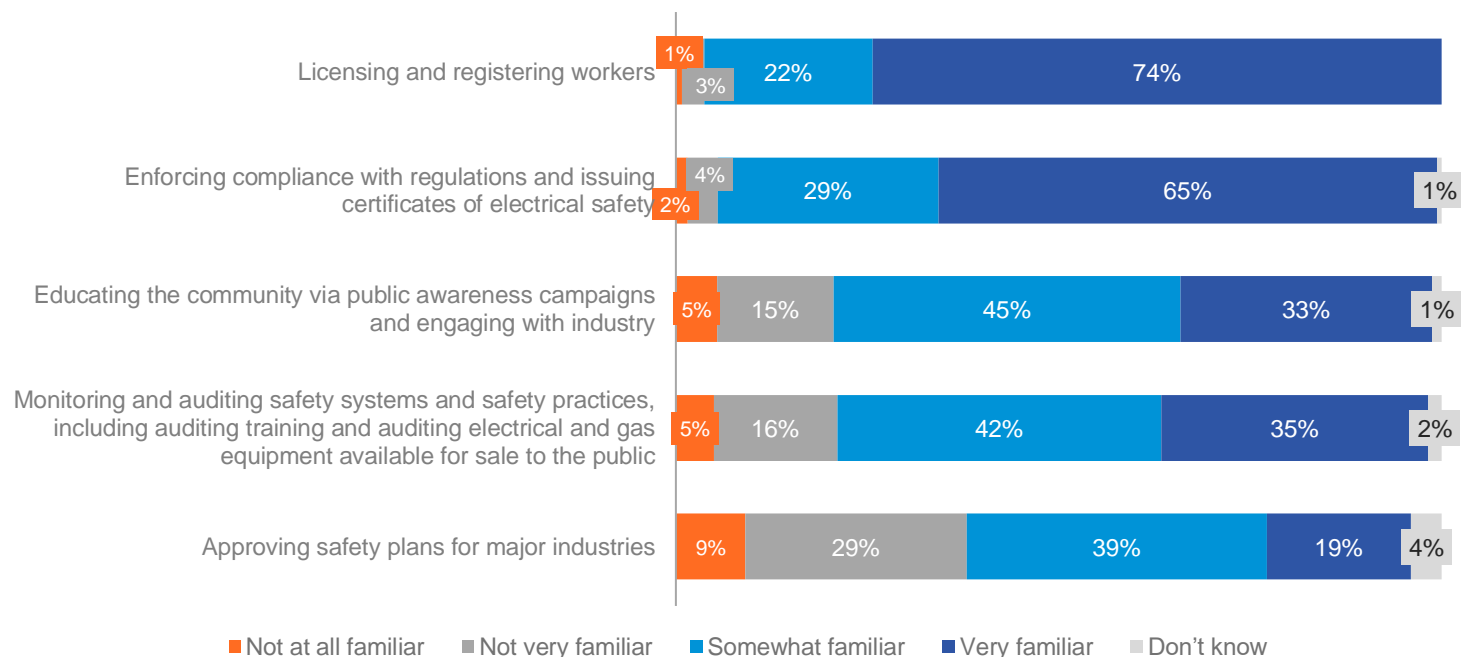
Gasfitter

Electricians

Electricians – familiarity with ESV

Electricians – Familiarity with ESV's roles

Base: Electricians (n=1,970)



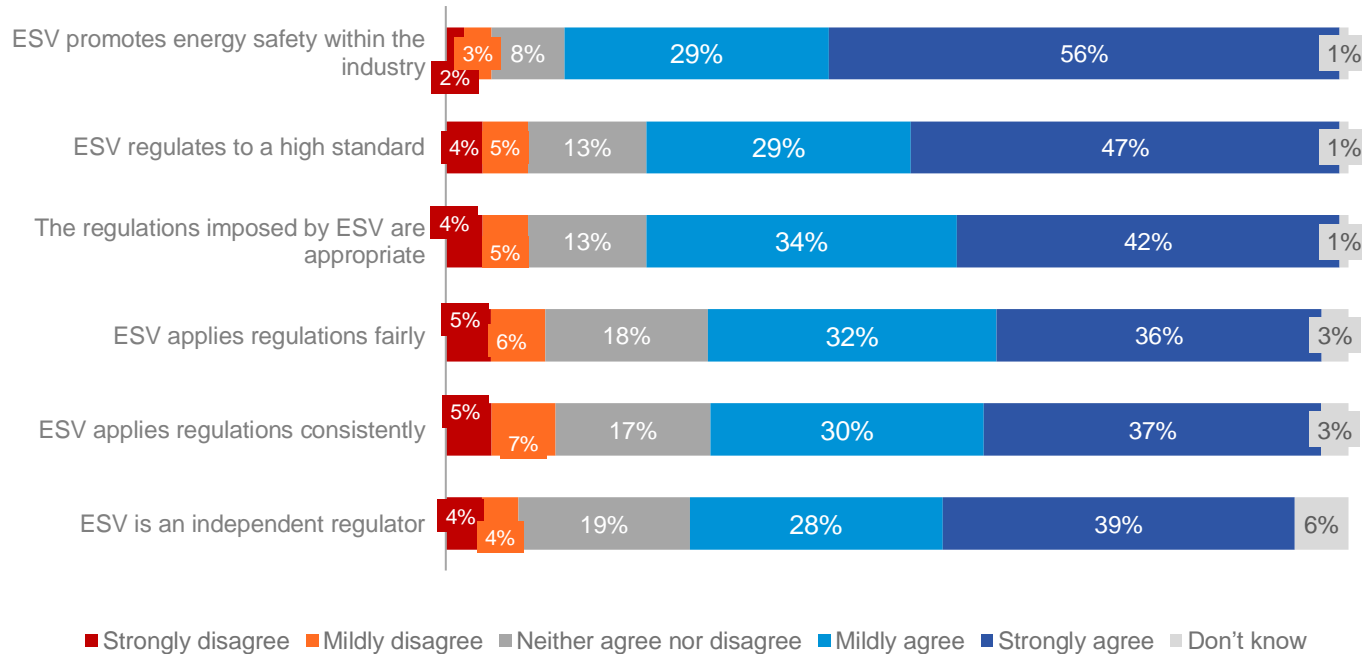
No significant differences in agreement by demographic characteristics.

Q8 - How familiar do you feel with each of ESV's core roles as a regulator?

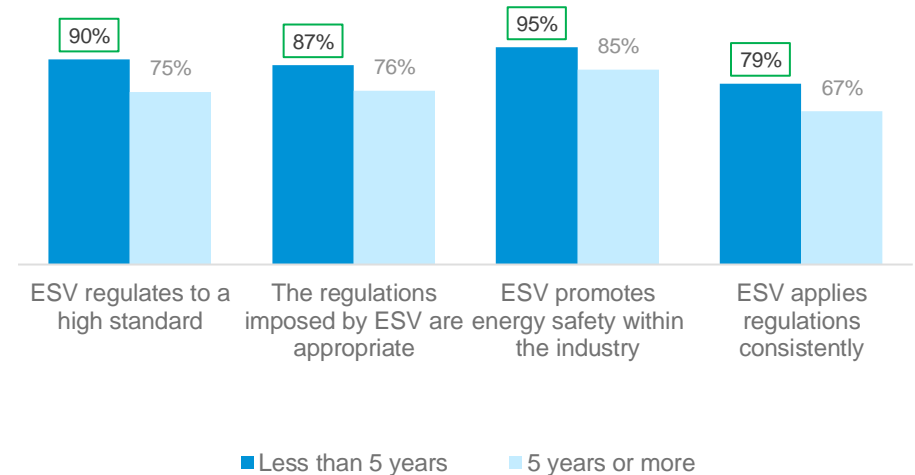
Electricians – perceptions of ESV

Electricians – Perceptions of ESV

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly more likely to agree with the below statements on their perceptions of ESV, compared to those who had been licensed for longer than 5 years.

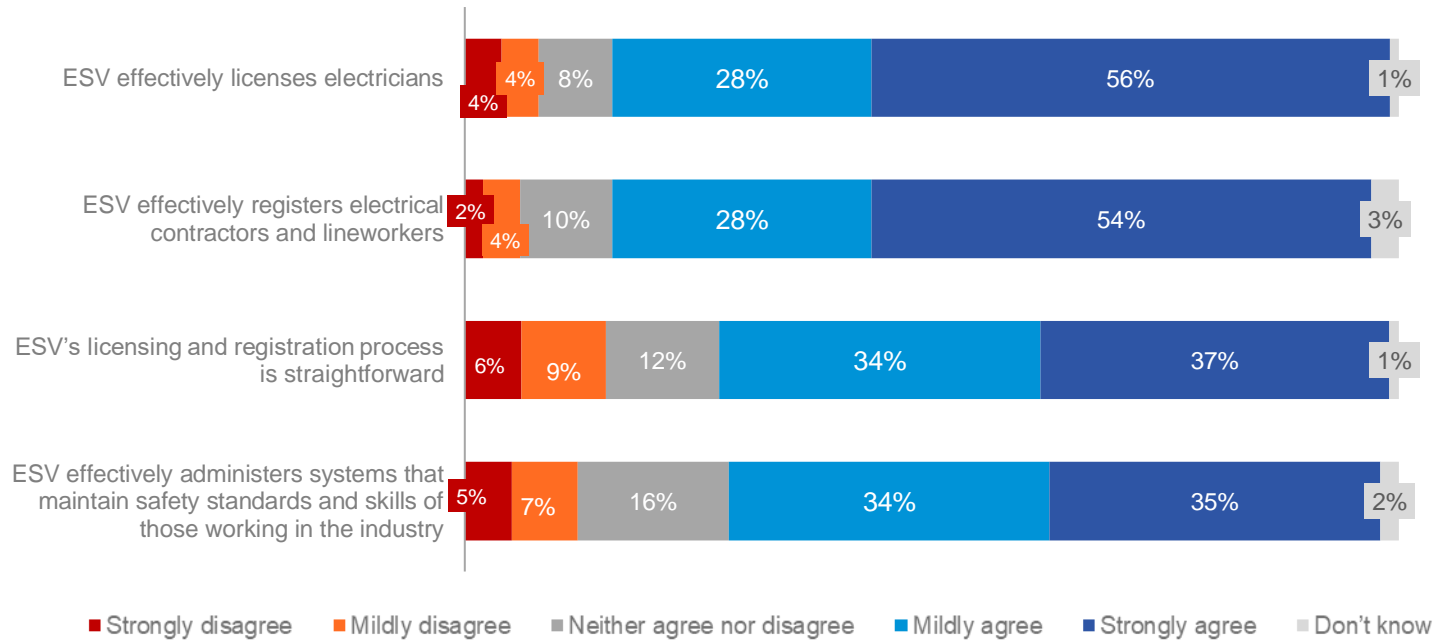


Q9 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

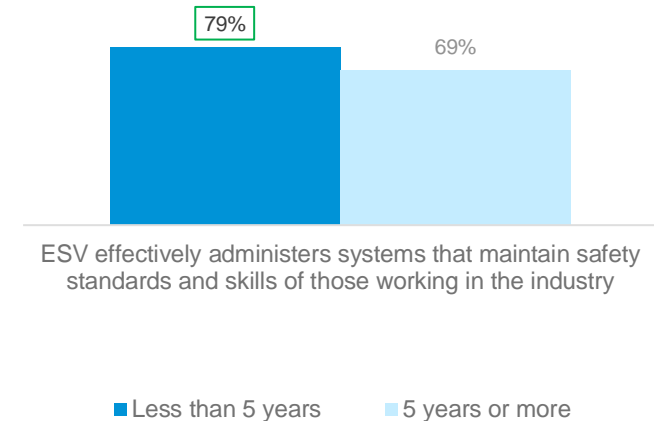
Electricians – licensing, registering, monitoring and auditing

Electricians – Performance in licensing and registering workers

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly more likely to agree ESV effectively administers systems that maintain safety standards, compared to those who had been licensed for longer than 5 years. No other significant differences by length of being licensed.

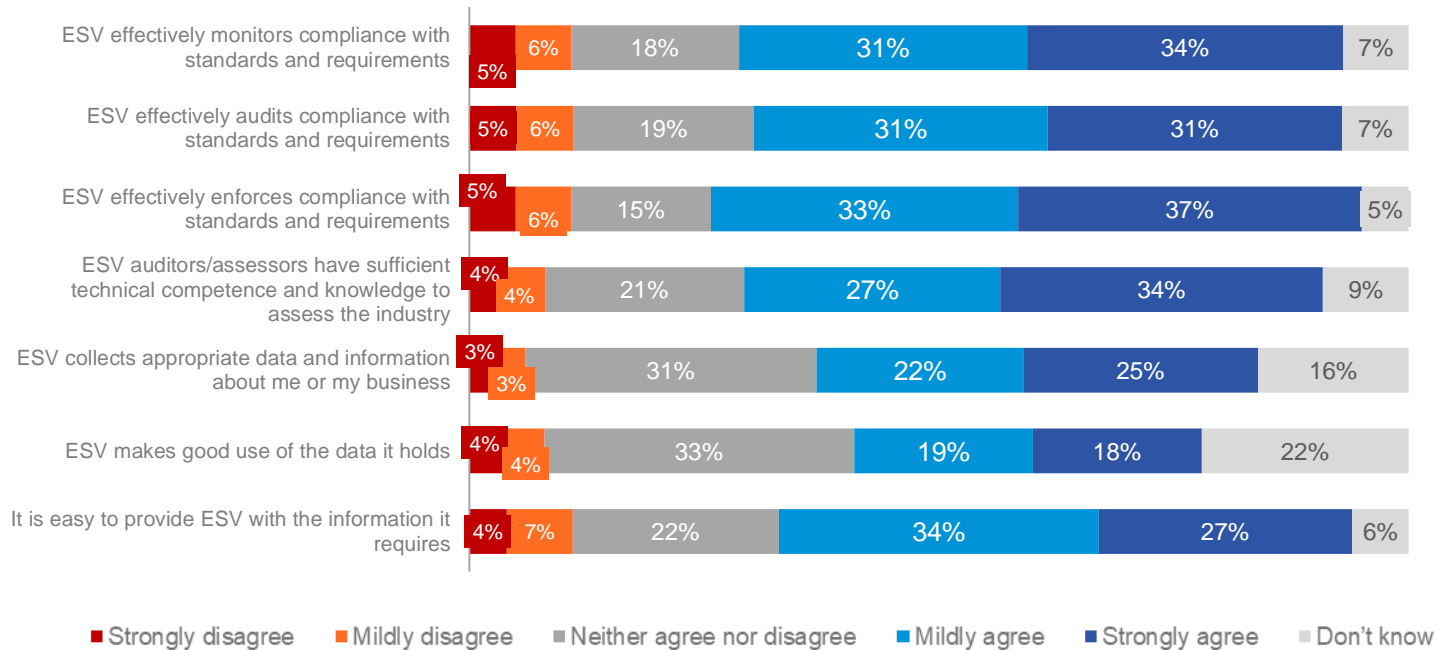


Q10 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

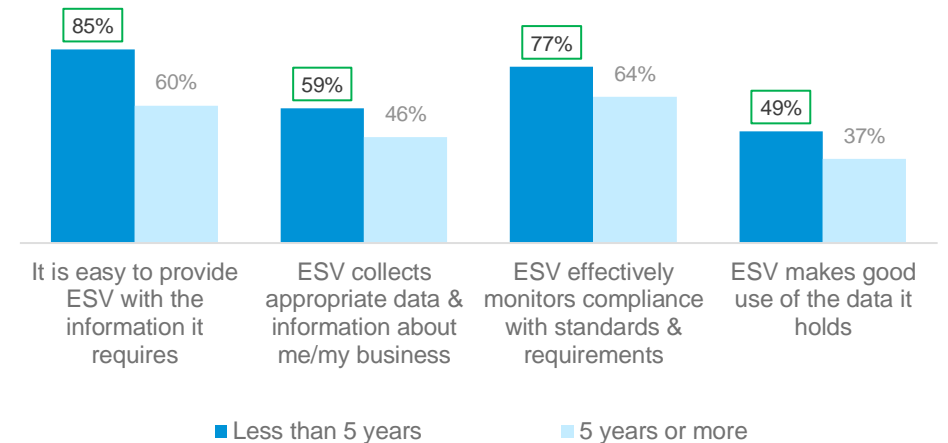
Electricians – licensing, registering, monitoring and auditing

Electricians – Performance in monitoring and auditing safety systems and practices

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly more likely to agree with the below statements on ESV's performance in monitoring and auditing safety systems and practices, compared to those who had been licensed for longer than 5 years.

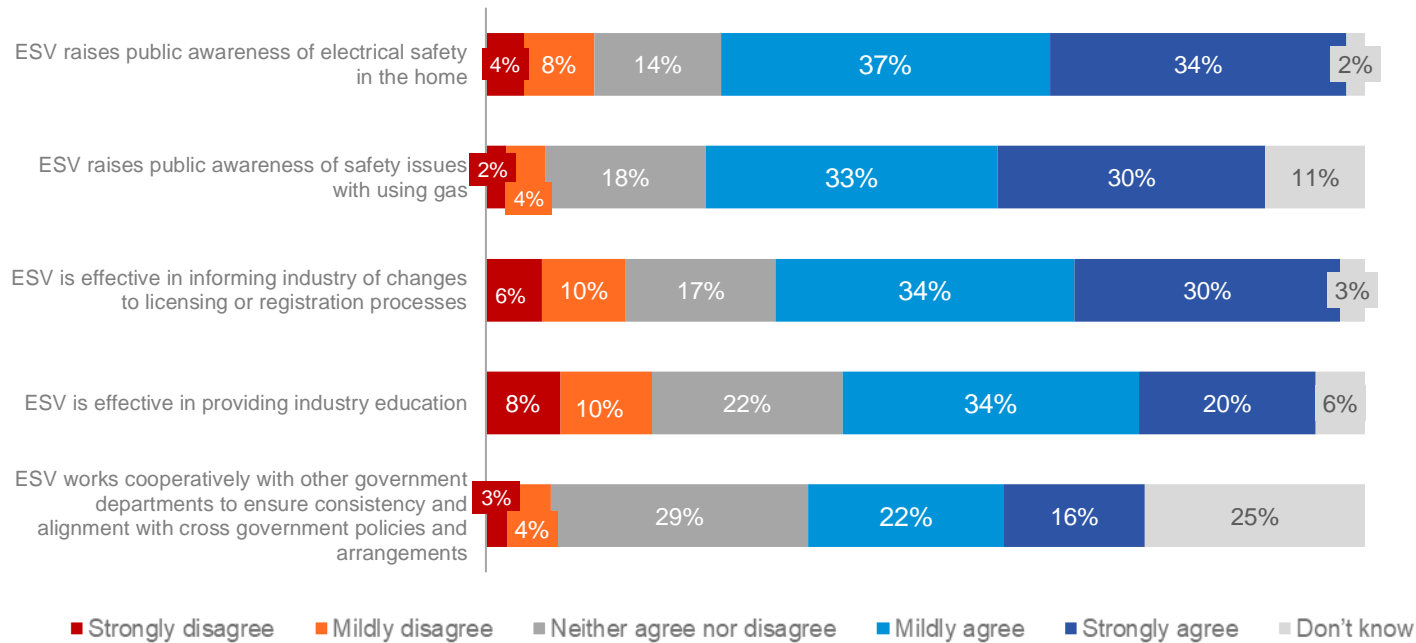


Q11 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

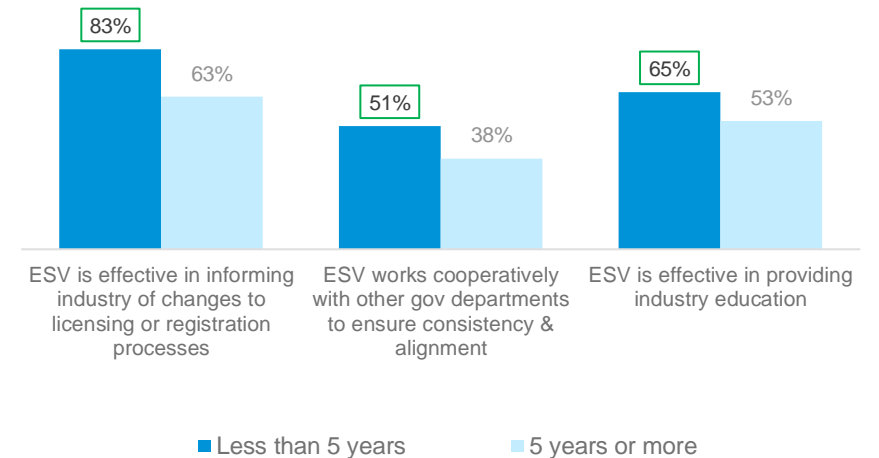
Electricians – licensing, registering, monitoring and auditing

Electricians – Performance in educating the community via public awareness campaigns and engaging with industry

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly more likely to agree with the below statements on ESV's performance in educating the community, compared to those who had been licensed for longer than 5 years.

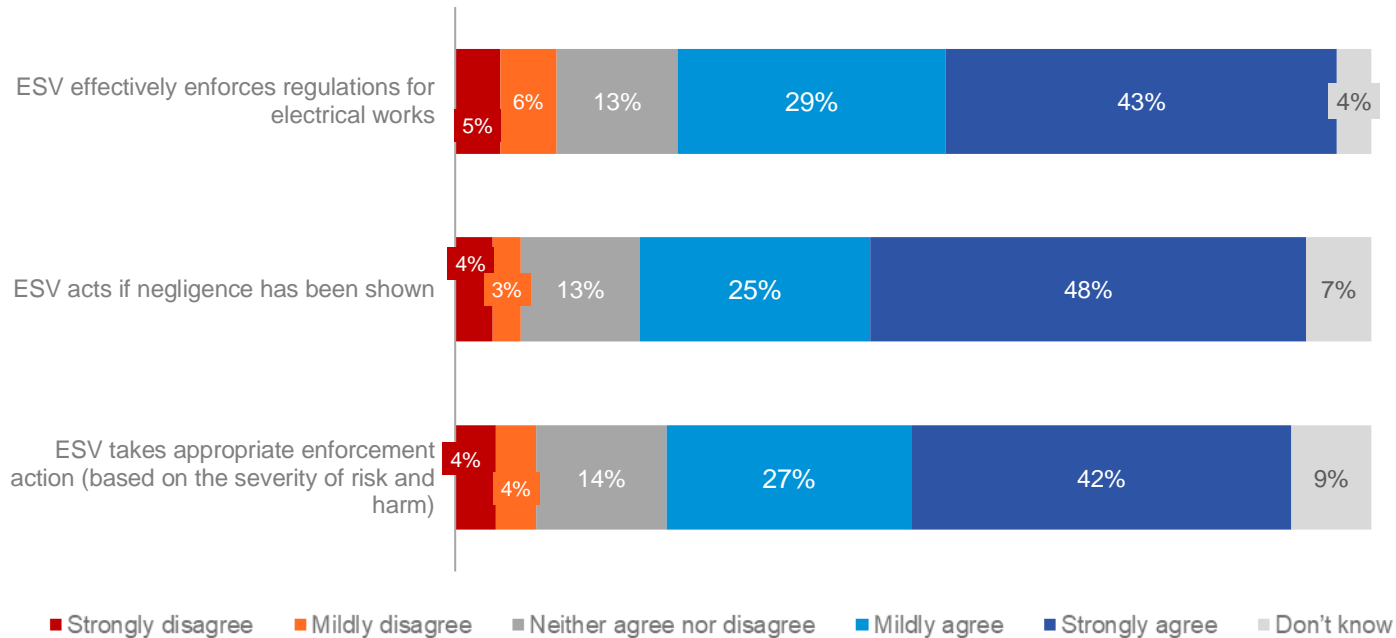


Q12 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

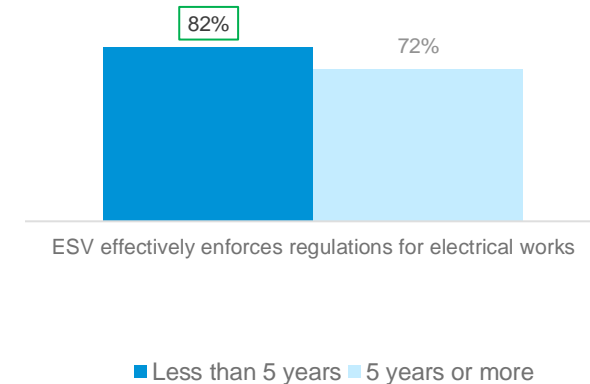
Electricians – licensing, registering, monitoring and auditing

Electricians – Performance in enforcing compliance with regulations and issuing certificates of electrical safety

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly more likely to agree ESV effectively enforces regulations for electrical works, compared to those who had been licensed for longer than 5 years. No other significant differences by length of being licensed.

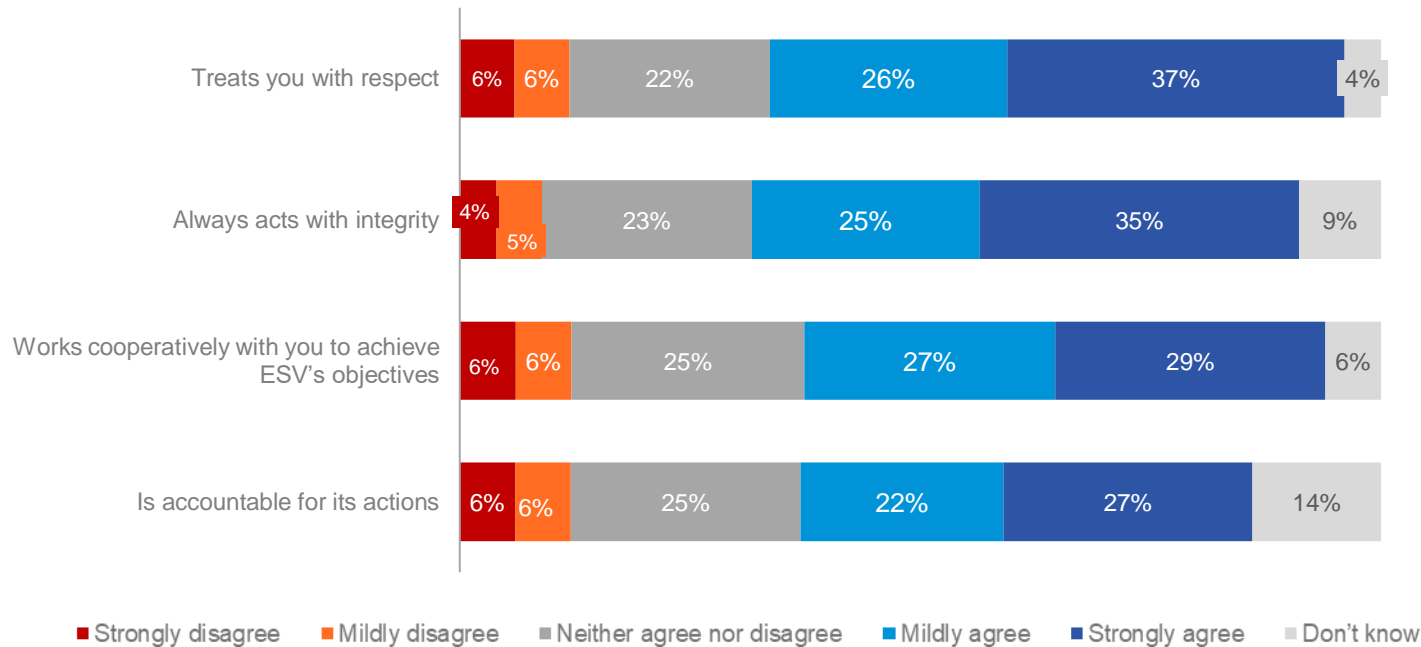


Q13 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

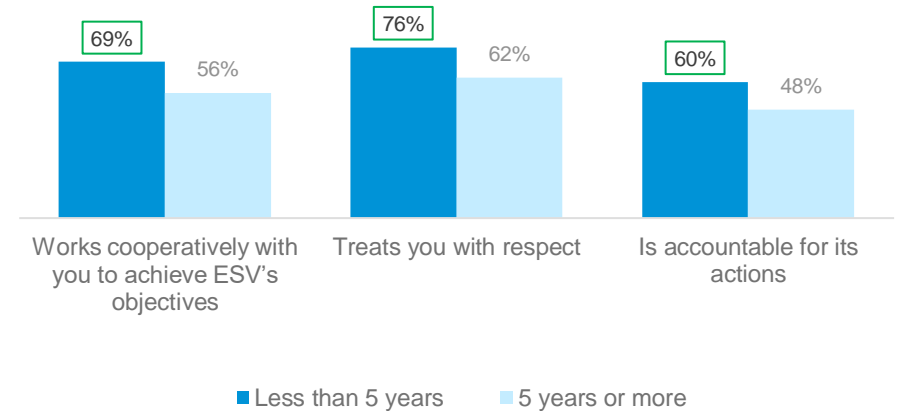
Electricians – licensing, registering, monitoring and auditing

Electricians – Relationship with ESV

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly more likely to agree with the below statements on their relationship with ESV, compared to those who had been licensed for longer than 5 years.

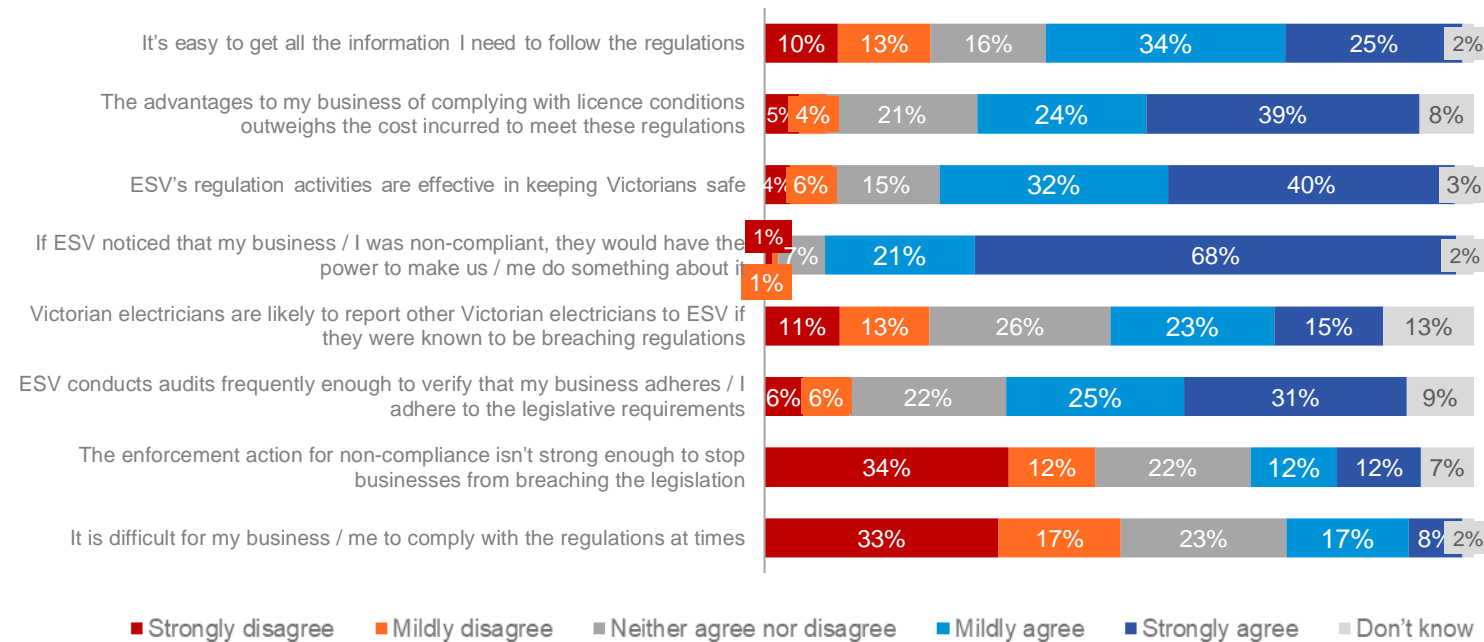


Q14 - To what extent would you agree or disagree that Energy Safe Victoria (ESV)...?

Electricians – licensing, registering, monitoring and auditing

Electricians – Ease of complying with regulations

Base: Electricians (n=1,970)



Electricians who had been licensed for less than 5 years were significantly **less** likely to agree 'it is difficult for my business / me to comply with the regulations at times', compared to those who had been licensed for longer than 5 years (14% vs 25%). No other significant differences by length of time electricians had been licensed.

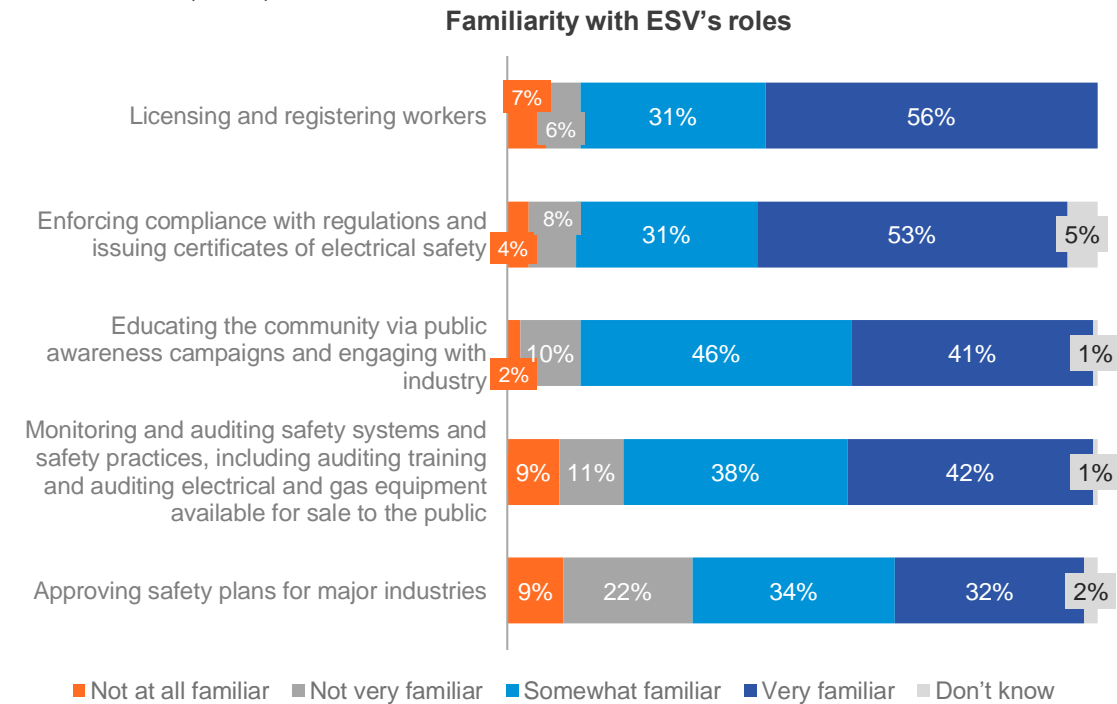
Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

Gasfitters

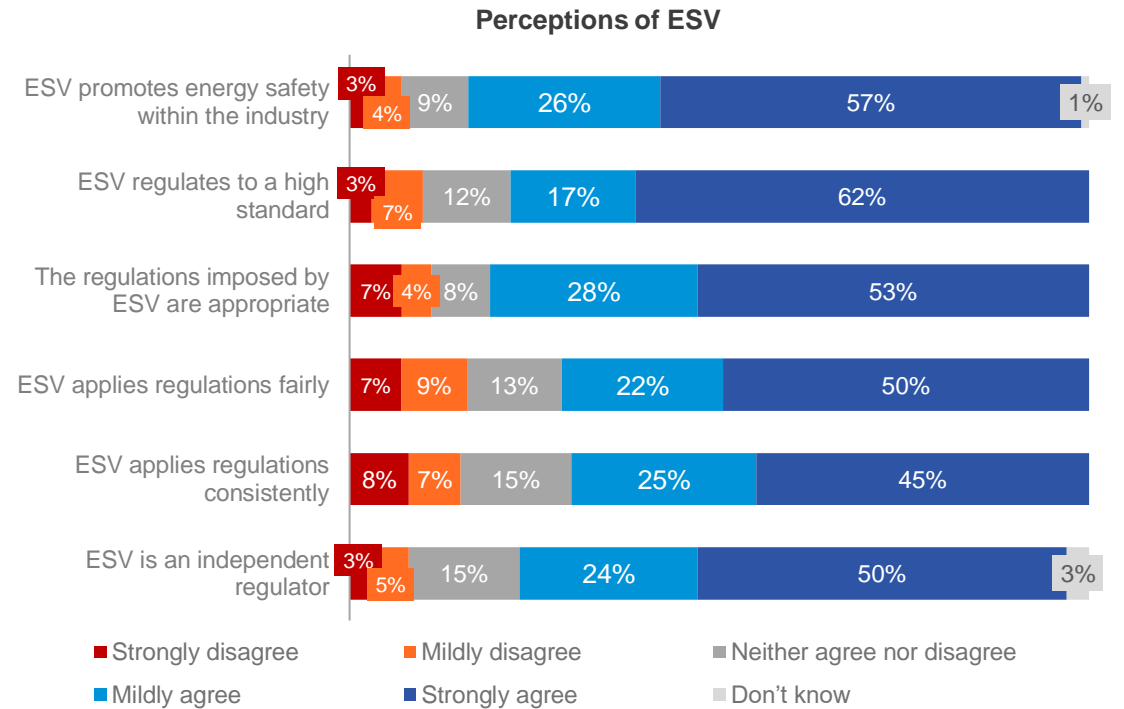
Gasfitters – familiarity and perceptions of ESV

Gasfitters – Familiarity with ESV’s roles and perceptions of ESV

Base: Gasfitters (n=137)



Q8 - How familiar do you feel with each of ESV’s core roles as a regulator?



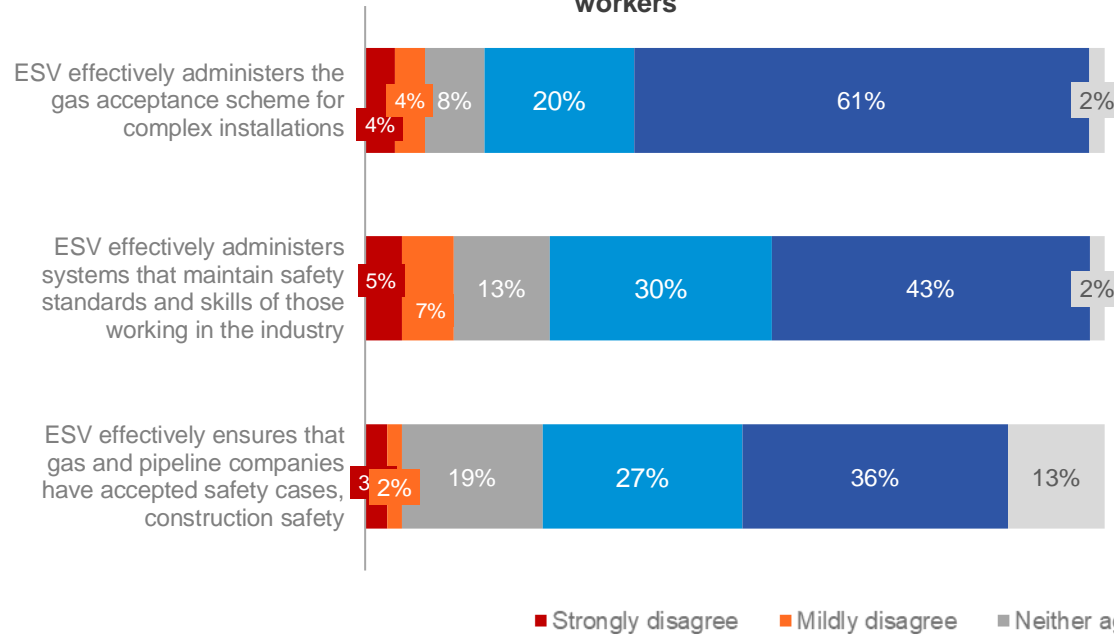
Q9 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Gasfitters – licensing, registering, monitoring and auditing

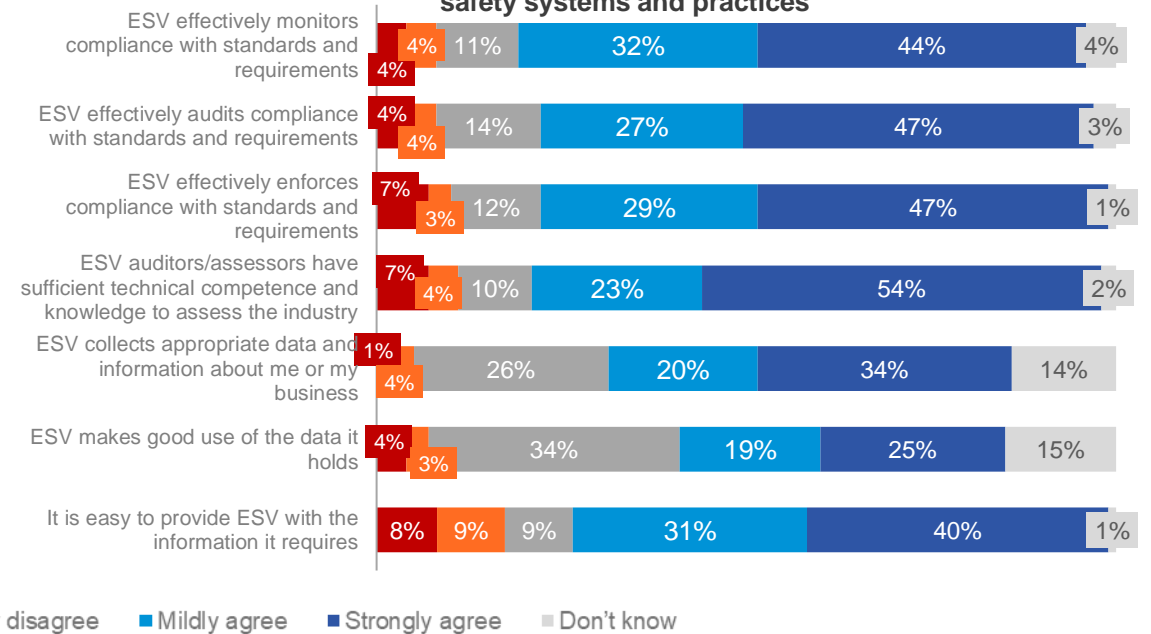
Gasfitters – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Gasfitters (n=137)

Performance in licensing and registering workers



Performance in monitoring and auditing safety systems and practices



Q10 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

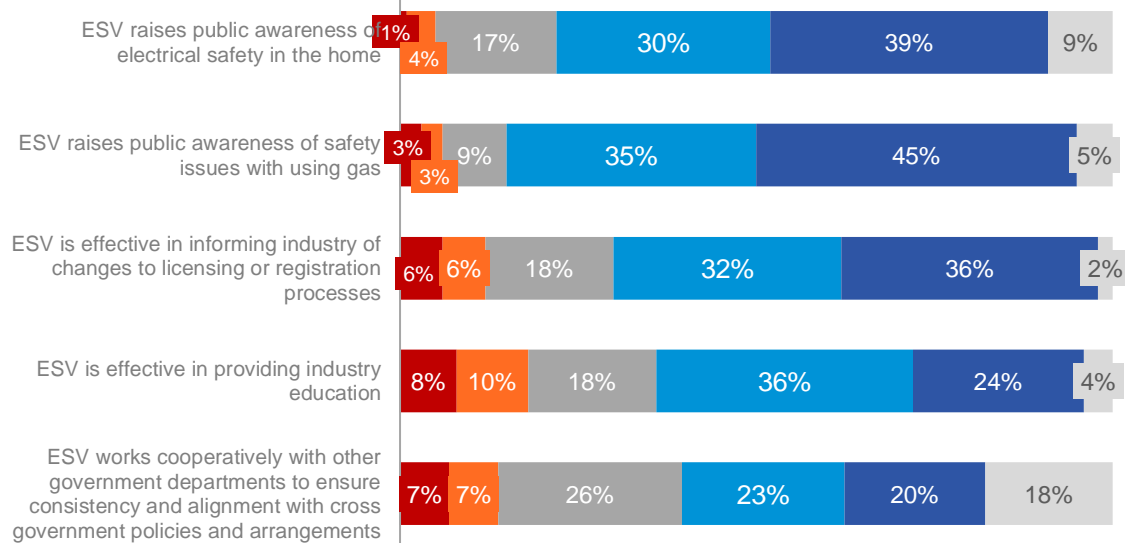
Q11 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Gasfitters – licensing, registering, monitoring and auditing

Gasfitters – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Gasfitters (n=137)

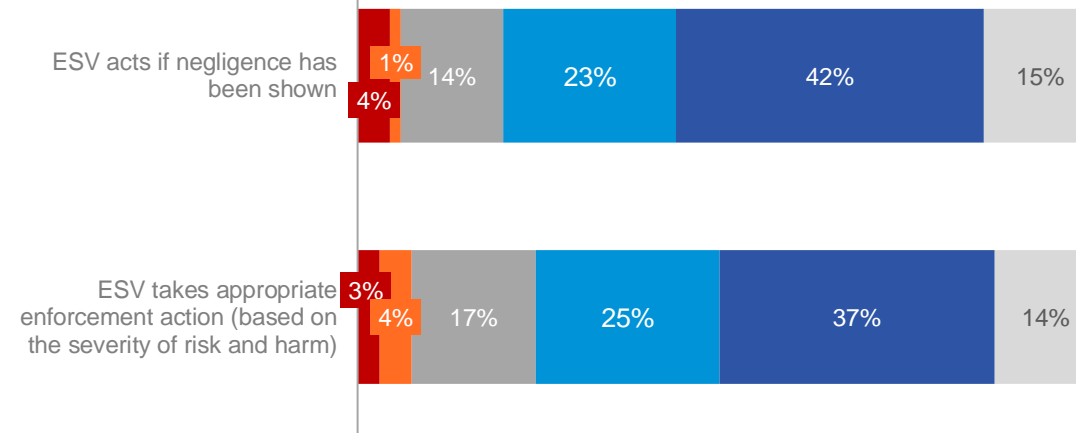
Educating the community via public awareness campaigns and engaging with industry



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q12 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Enforcing compliance with regulations and issuing certificates of electrical safety



Q13 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Gasfitters – licensing, registering, monitoring and auditing

Gasfitters – Relationship with ESV & ease of complying with regulations

Base: Gasfitters (n=137)



Q14 - To what extent would you agree or disagree that Energy Safe Victoria (ESV)...?

Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?



Appendix 1 – Summary of other stakeholder groups

Who we spoke to

Response rates differed significantly by stakeholder group

- ESV provided sample lists (emails) for all stakeholder groups.
- The sample lists were deduplicated (i.e. where the same email address appeared multiple times, additional entries were eliminated).
- Response rates were good among pipeline licensees, electrical distributors and local government (all above 20%); but relatively low among manufacturers.

	Population*	Number of respondents n=	Unsubscribed	Bounced back	Response rate**	Maximum margin of error*** +/-
Total	51,687	2,241	551	2556	5%	N/A
Appliance manufacturers	3,188	72	84	56	2%	11.4%
Pipeline licensees	106	27	0	1	26%	16.4%
Local government	69	20	0	5	31%	18.6%
Electrical distributors	72	15	0	8	23%	22.7%
Gas distributors	4	0	0	0	0%	N/A

Given the small number of responses within each of these stakeholder groups (except Appliance manufacturers), survey responses should be treated as indicative only, and interpreted with caution.

*After deduplication and removal of non-valid entries

**Response rate = sample achieved divided by (total unique invites sent minus bounce backs)

***The finite population correction has been applied to these samples in calculating margin of error

Stakeholder satisfaction indices

The satisfaction indices represent the average percentage of respondents who strongly/mildly agreed with each of the statements they are comprised of.

		Appliance manufacturers	Pipeline licensees	Local government	Electricity distributors
General perceptions of ESV (Q9 index)	<ul style="list-style-type: none"> ESV is an independent regulator ESV regulates to a high standard The regulations imposed by ESV are appropriate ESV applies regulations fairly ESV applies regulations consistently 	63%	75%	76%	61%
How ESV treats stakeholders (Q14 index)	<ul style="list-style-type: none"> ESV treats you with respect ESV always acts with integrity ESV works cooperatively with you to achieve ESV's objectives ESV is accountable for its actions 	65%	80%	86%	70%
Ease of complying with regulations (Table of 11 index)	<ul style="list-style-type: none"> It's easy to get all the information I need to follow the regulations The advantages to my business of complying with licence conditions outweighs the cost incurred to meet these regulations ESV's regulation activities are effective in keeping Victorians safe If ESV noticed that I was non-compliant, they would have the power to make me do something about it Victorian electricians / gasfitters are likely to report other Victorian electricians / gasfitters to ESV if they were known to be breaching regulations ESV conducts audits frequently enough to verify that I adhere to the legislative requirements The enforcement action taken for non-compliance with the legislative requirements isn't strong enough to me from breaching the legislation It is difficult for me to comply with the regulations at times The regulations imposed by ESV are appropriate 	54%	59%	59%	53%

Stakeholder satisfaction dashboard

Objective	Success Indicator	Performance			
		Appliance manufacturers (n=72)	Pipeline licensees (n=27*)	Local government (n=20*)	Electricity distributors (n=15*)
Awareness (Q6) % yes	Before today, were you aware that Energy Safe Victoria (ESV) is responsible for the safety and technical regulation of electricity and electrical appliances, gas and pipelines/electricity and electrical appliances/gas and pipelines in Victoria?	89%	100%	100%	100%
Familiarity (Q8) % very / somewhat familiar	Licensing and registering workers	57%	81%	75%	100%
	Approving safety plans for major industries	39%	93%	70%	93%
	Monitoring and auditing safety systems and safety practices	69%	93%	90%	93%
	Educating the community via public awareness campaigns and engaging with industry	54%	74%	75%	80%
	Enforcing compliance with regulations and issuing certificates of electrical safety	89%	89%	95%	93%
Confidence in ESV (Q7) % totally/very confident	ESV's role is to regulate the electricity, gas and pipeline industries, to minimise safety risks and promote energy safety and efficiency. How confident are you that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable?	58%	59%	80%	47%
Overall performance of ESV (Q9 & Q14) % strongly/mildly agree	ESV is an independent regulator	68%	78%	85%	67%
	ESV regulates to a high standard	75%	78%	85%	53%
	ESV promotes energy safety within the industry	79%	78%	85%	80%
	ESV applies regulations fairly	56%	74%	70%	67%
	ESV applies regulations consistently	57%	67%	75%	60%
	Treats you with respect	76%	89%	95%	67%
	Always acts with integrity	64%	78%	90%	80%
	Works cooperatively with you to achieve ESV's objectives	67%	78%	95%	73%
	Is accountable for its actions	54%	74%	65%	60%

Stakeholder satisfaction dashboard

Objective	Success Indicator	Performance			
		Appliance manufacturers (n=72)	Pipeline licensees (n=27*)	Local government (n=20*)	Electricity distributors (n=15*)
Educating the community via public awareness campaigns and engaging with industry (Q12) % strongly/mildly agree	ESV is effective in providing industry education	40%	52%	65%	40%
	ESV is effective in informing industry of changes to licensing or registration processes	40%	59%	55%	60%
	ESV raises public awareness of electrical safety in the home	58%	48%	55%	53%
	ESV raises public awareness of safety issues with using gas	49%	56%	50%	40%
	ESV works cooperatively with other government departments to ensure consistency and alignment with cross-government policies and arrangements	35%	33%	60%	27%
Compliance with regulations (Q15) % strongly/mildly agree	It's easy to get all the information I need to follow the regulations	51%	70%	65%	53%
	The advantages of complying with licence conditions outweighs the cost incurred to meet these regulations	67%	59%	50%	60%
	ESV's regulation activities are effective in keeping Victorians safe	64%	78%	70%	60%
	If ESV noticed that we/I was non-compliant, they would have the power to make us/me do something about it	86%	93%	95%	80%
	Businesses/electricians/gasfitters are likely to report other Businesses/electricians/gasfitters to ESV if they were known to be breaching regulations	47%	41%	50%	40%
	ESV conducts audits frequently enough to verify that we/I adhere to the legislative requirements	46%	93%	75%	67%
	The enforcement action taken for non-compliance with the legislative requirements isn't strong enough to stop us/me from breaching the legislative requirements	32%	4%	20%	13%
	It is difficult for my business/me to comply with the regulations at times	35%	15%	45%	40%
	The regulations imposed by ESV are appropriate	61%	78%	65%	60%
Enforcing compliance with regulations and issuing certificates of electrical safety (Q13) % strongly/mildly agree	ESV takes appropriate enforcement action (based on the severity of risk and harm)	63%	59%	80%	60%
	ESV acts if negligence has been shown	61%	52%	80%	80%
	LOCAL GOVERNMENT, ELECTRICITY DISTRIBUTOR, ELECTRICIANS: ESV effectively enforces regulations for electrical works			80%	73%

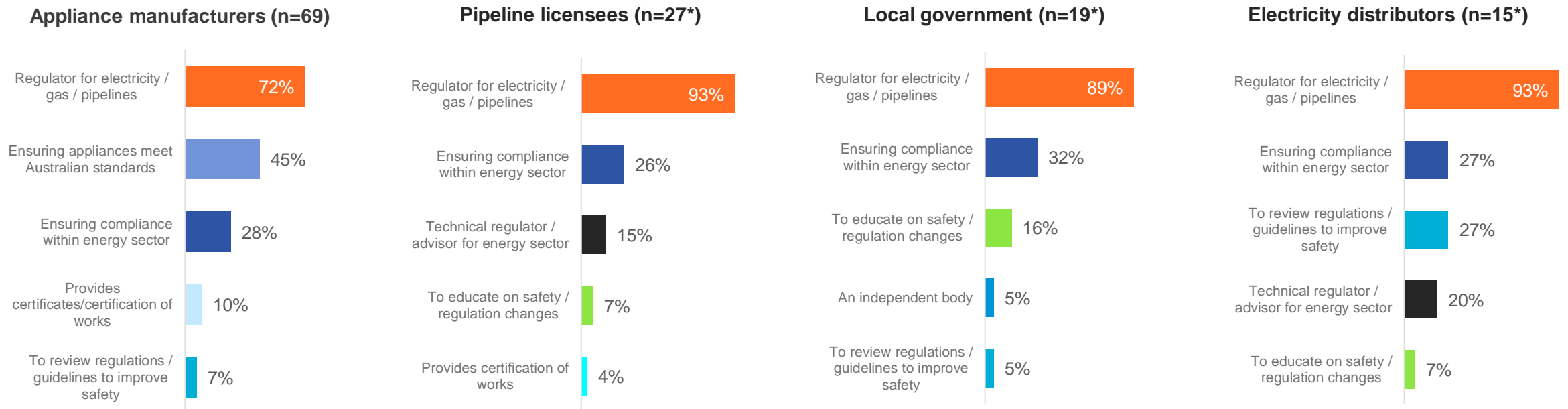
Stakeholder satisfaction dashboard

Objective	Success Indicator	Performance			
		Appliance manufacturers (n=72)	Pipeline licensees (n=27*)	Local government (n=20*)	Electricity distributors (n=15*)
Monitoring and auditing safety systems and safety practices (Q11) % strongly/mildly agree	DISTRIBUTOR: ESV effectively audits compliance against approved safety cases				53%
	ESV effectively monitors compliance with standards and requirements	61%	78%	85%	53%
	ESV effectively audits compliance with standards and requirements	57%	78%	90%	60%
	ESV effectively enforces compliance with standards and requirements	68%	78%	80%	73%
	ESV auditors/assessors have sufficient technical competence and knowledge to assess the industry	57%	81%	80%	60%
	ESV collects appropriate data and information about me or my business	47%	74%	85%	33%
	ESV makes good use of the data it holds	35%	41%	65%	20%
	It is easy to provide ESV with the information it requires	60%	74%	75%	47%
Licencing and registering workers and approving safety plans for major industries (Q10) % strongly/mildly agree	ESV effectively administers systems that maintain safety standards and skills of those working in the industry	47%	63%	75%	60%
	ELECTRICIANS: ESV effectively licenses electricians				
	ELECTRICIANS: ESV effectively registers electrical contractors and lineworkers				
	ELECTRICIANS: ESV's licensing and registration process is straightforward				
	ELECTRICITY DISTRIBUTOR: ESV effectively assesses and audits safety cases for major companies				60%
	PIPELINE LICENSEES, GAS FITTERS: ESV effectively administers the gas acceptance scheme for complex installations		41%		
PIPELINE LICENSEES, GAS FITTERS: ESV effectively ensures that gas and pipeline companies have accepted safety cases, construction safety cases and receive consent to operate		81%			

All stakeholder groups tend to see regulation and ensuring compliance as key roles of ESV

Top 5 roles attributed to ESV by stakeholder group

Base: All respondents



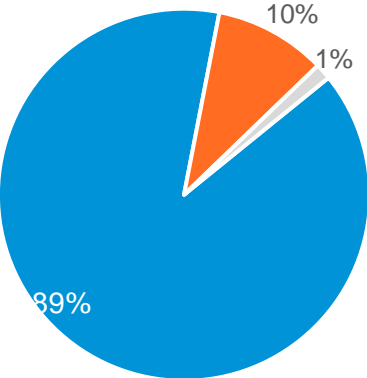
Q5 - What do you understand Energy Safe Victoria's (ESV) role to be?

The vast majority of all stakeholders were aware of ESV's regulatory role, although 11% of appliance manufacturers were not

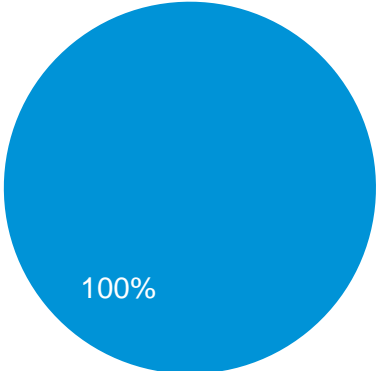
Awareness of ESV's regulatory responsibility

Base: All respondents

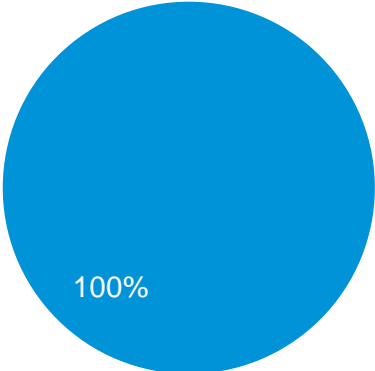
Appliance manufacturers (n=72)



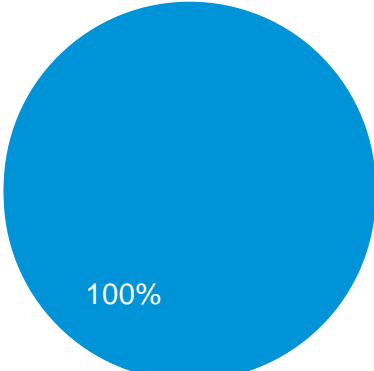
Pipeline licensees (n=27*)



Local government (n=20*)



Electricity distributors (n=15*)



■ Yes ■ No ■ Not sure

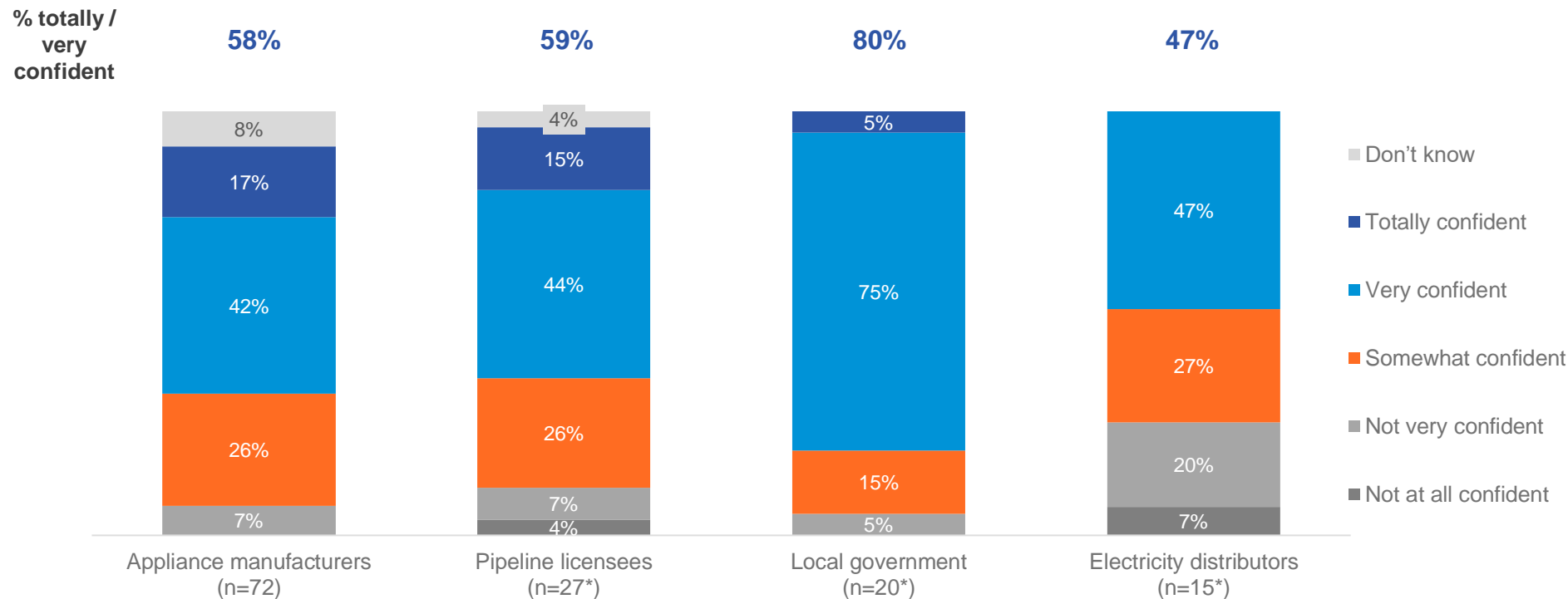
Q6 - Before today, were you aware that ESV is responsible for the safety and technical regulation of electricity and electrical appliances, gas and pipelines?

*Note: small sample size; indicative only

At least half of most stakeholders were totally/very confident that ESV's activities minimise risks as far as practicable

Confidence that ESV's activities minimise risks in the electricity and gas pipeline industries as far as practicable

Base: All respondents



Four in five Local government stakeholders were totally or very confident that ESV's activities minimise risks in the electricity and gas pipeline industries as far as practicable (though this is based on a small sample size).

The only stakeholder group with less than half of the cohort expressing confidence in ESV was Electricity distributors (again, based on a small sample size).

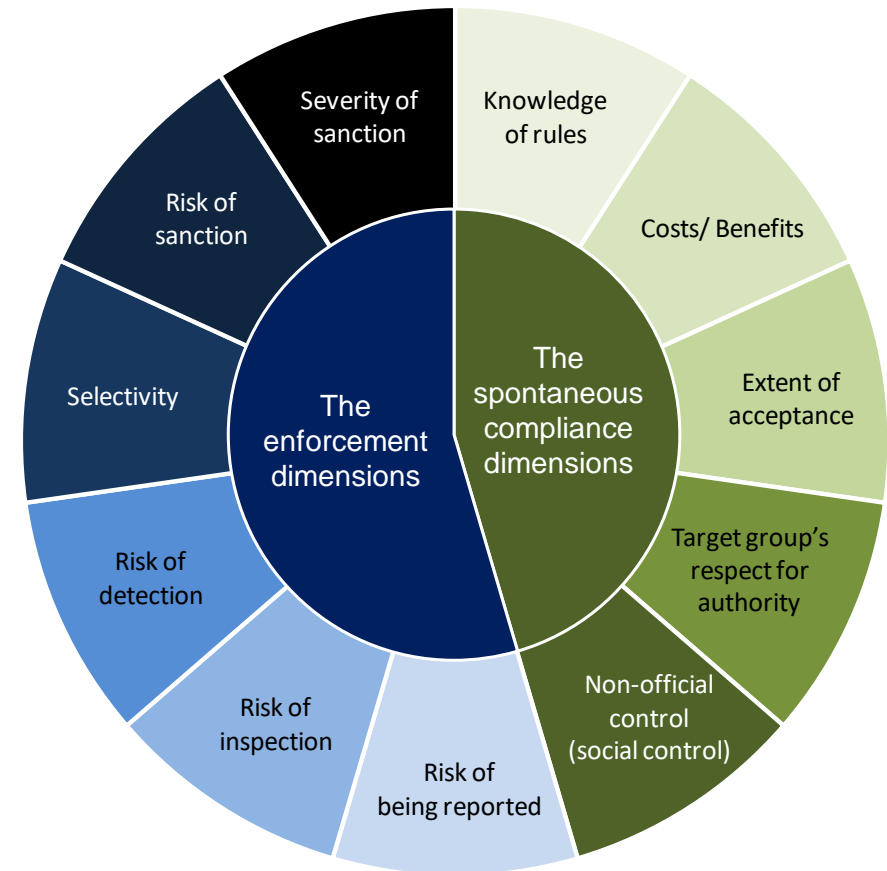
Q7 - How confident are you that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable?

Indicates significant difference from total

*Note: small sample size; indicative only

Assessing organisations' attitudes to compliance

- To assess a business's level of compliance with legislation, a series of questions were included based around the 'Table of Eleven', originally developed by the Dutch Ministry of Justice.
- The Table of Eleven is a model based on behavioural science, consisting of eleven dimensions. Together, these dimensions are decisive in determining the level of compliance with legislation.
- Key questions were asked to determine current attitudes to, and to improve compliance.



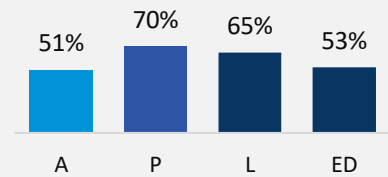
Electricians and manufacturers least likely to feel ESV audits frequently enough to verify adherence to legislation

Attitudes towards compliance (% strongly / mildly agree)

Base: Appliance Manufacturers (n=72); Pipeline licensees (n=27*); Local government (n=20*); Electricity distributors (n=15*)

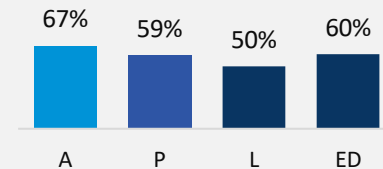
Knowledge of rules

It's easy to get all the information I need to follow the regulations



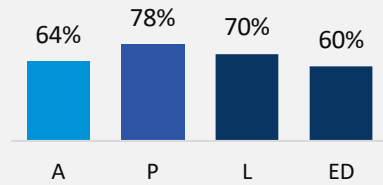
Cost/benefits

The advantages to my business of complying with the licence conditions outweighs the cost incurred to meet these regulations

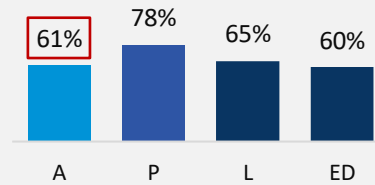


Extent of acceptance

ESV's regulation activities are effective in keeping Victorians safe



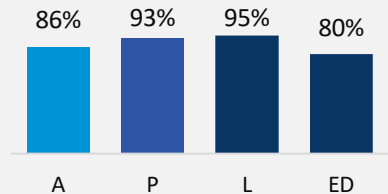
The regulations imposed by ESV are appropriate



- A = Appliance manufacturers (n=72)
- P = Pipeline licensees (n=27*)
- L = Local government (n=20*)
- ED = Electricity distributors (n=15*)

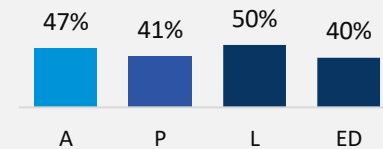
Respect for authority

If ESV noticed that we were not compliant, they would have the power to make us do something about it



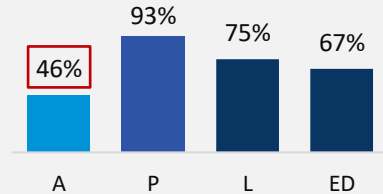
Risk of being reported

Businesses in my sector are likely to report other businesses to ESV if they were known to be breaching regulations



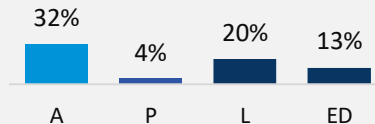
Risk of inspection

ESV conducts audits frequently enough to verify that we adhere to the legislative requirements



Severity of sanction

The enforcement action taken for non-compliance with the legislative requirements isn't strong enough to stop businesses from breaching the legislative requirements



These questions identify that **Appliance manufacturers** in particular had lower knowledge and acceptance of regulations – indicators of potential for lower spontaneous compliance. They also felt that risk of being audited frequently was low and suggests this may be a higher-risk group to regulate.

Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

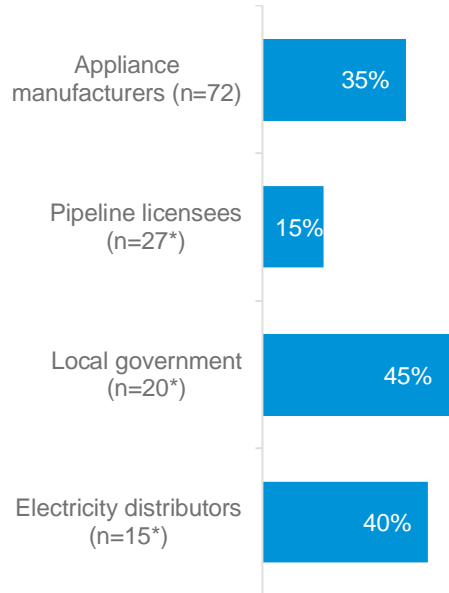
*Note: small sample size; indicative only

Ambiguous rules and too many regulations were key reasons for difficulty complying with regulations

Difficulty complying with regulations

Base: All respondents

It is difficult for my business/me to comply with the regulations at times



Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

Base: Those who agreed it was difficult for them or their business to comply with regulations at times; n=44

Reasons for difficulty complying – among other licensees who found it hard to comply



Response patterns did not differ significantly by stakeholder group.

Only responses at or above 7% shown

Q16 - You indicated that it is difficult for your organisation/your business/you to comply with the regulations at times. Please tell us in as much detail as possible why it is difficult to comply with the regulations.

In stakeholders' own words (relating to difficulty complying)...

Regulations are many and often vary across different regulators in the same space. Consistency and reduced load of regulation would be helpful.

Pipeline licensee

Some regulations are not practical to comply with and indicate a lack of understanding of the technical constraints that exist. Indeed, Regulatory Impact Statements have been written for a purpose and to justify decisions that have been made without proper consultation and without knowledge of the real impact of the regulatory requirements.

Electricity Distributor

The code of practice for vegetation clearance in LBRA areas is inappropriate. It is not practically possible to keep vegetation clear of the minimum clearance space at all times. Literal interpretation and enforcement of this requirement would lead to wholesale removal of trees in urban areas across Victoria. This requirement is unnecessary as supported by ESV's own data showing that the vast majority of faults are not caused by vegetation growing within clearance even when the rate of noncompliance across Victorian Councils is on average 30 to 50% at any given time.

Local Government

There are regulation books on regulation books, they are outrageously expensive and constantly revised.

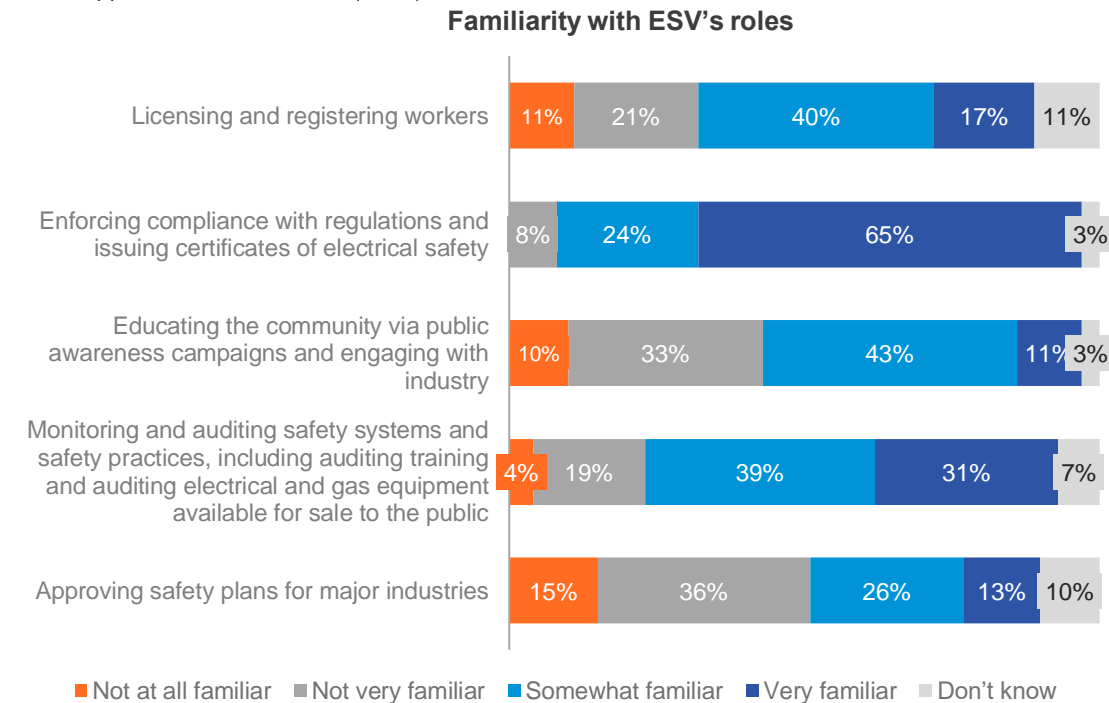
Appliance manufacturer

Appliance manufacturers

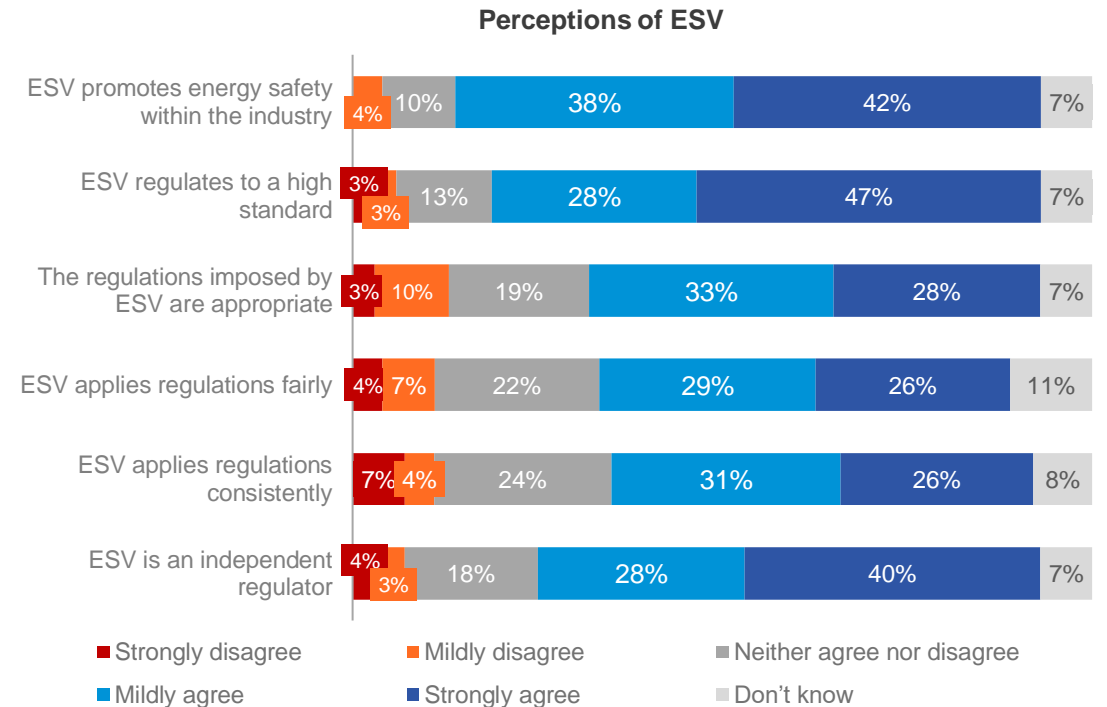
Appliance manufacturers – familiarity and perceptions of ESV

Appliance manufacturers – Familiarity with ESV’s roles and perceptions of ESV

Base: Appliance manufacturers (n=72)



Q8 - How familiar do you feel with each of ESV’s core roles as a regulator?



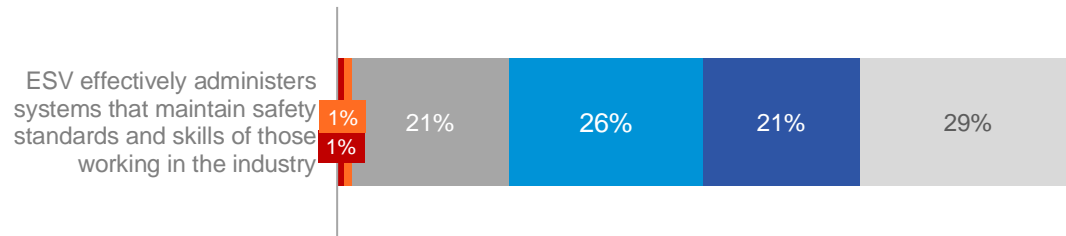
Q9 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Appliance manufacturers – licensing, registering, monitoring and auditing

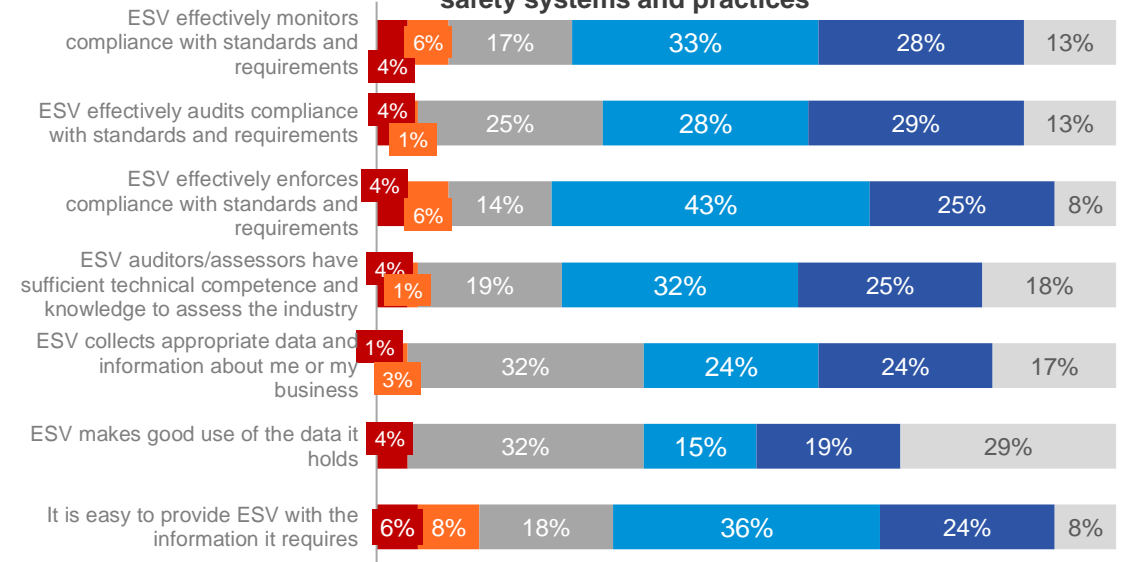
Manufacturers – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Appliance manufacturers (n=72)

Performance in licensing and registering workers



Performance in monitoring and auditing safety systems and practices



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q10 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

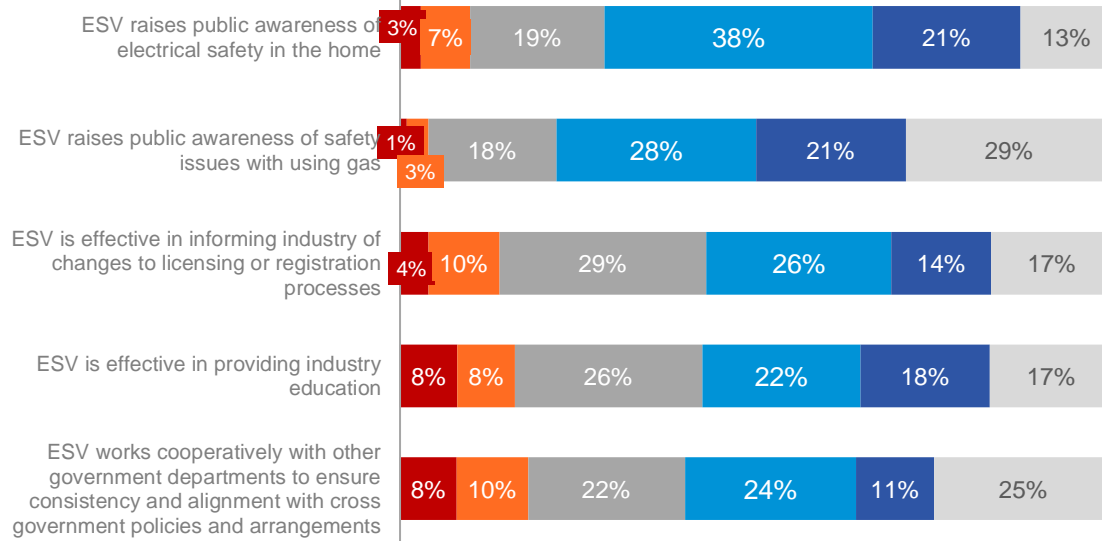
Q11 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Appliance manufacturers – licensing, registering, monitoring and auditing

Manufacturers – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Appliance manufacturers (n=72)

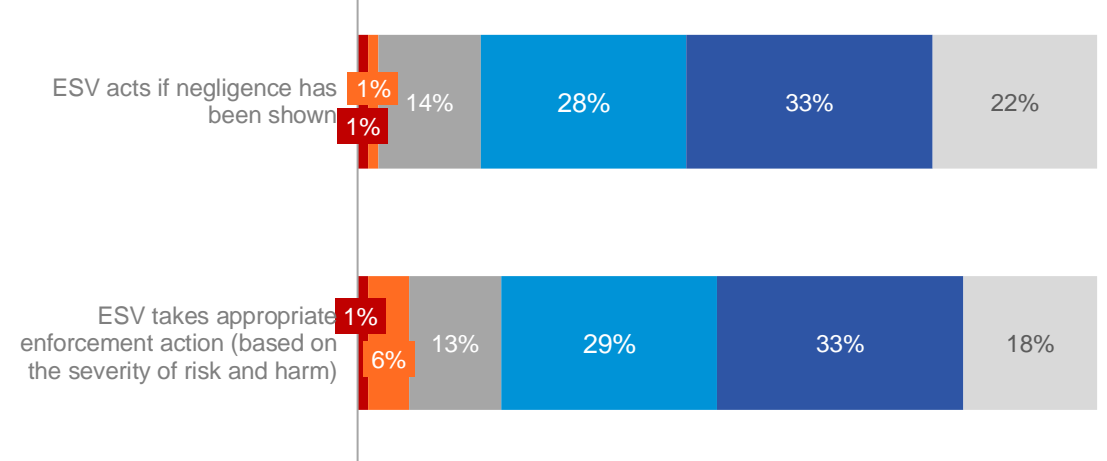
Educating the community via public awareness campaigns and engaging with industry



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q12 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Enforcing compliance with regulations and issuing certificates of electrical safety



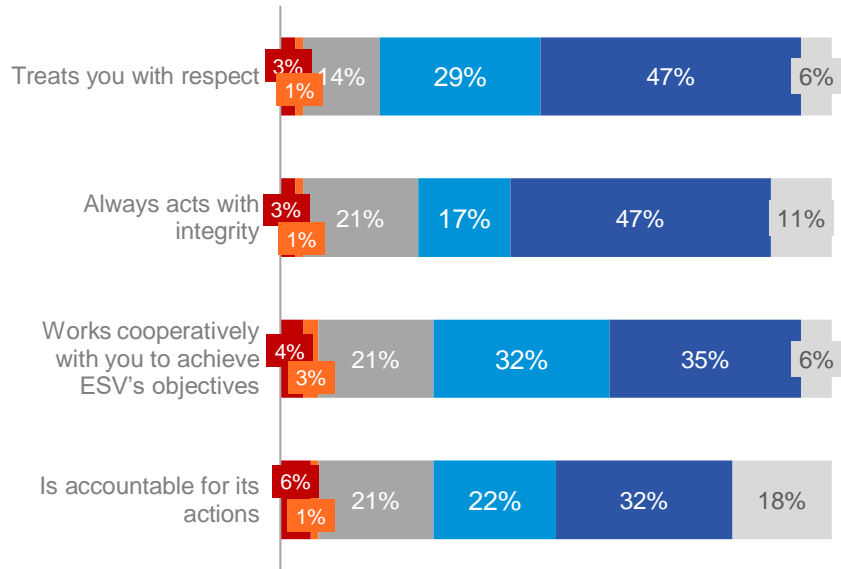
Q13 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Appliance manufacturers – licensing, registering, monitoring and auditing

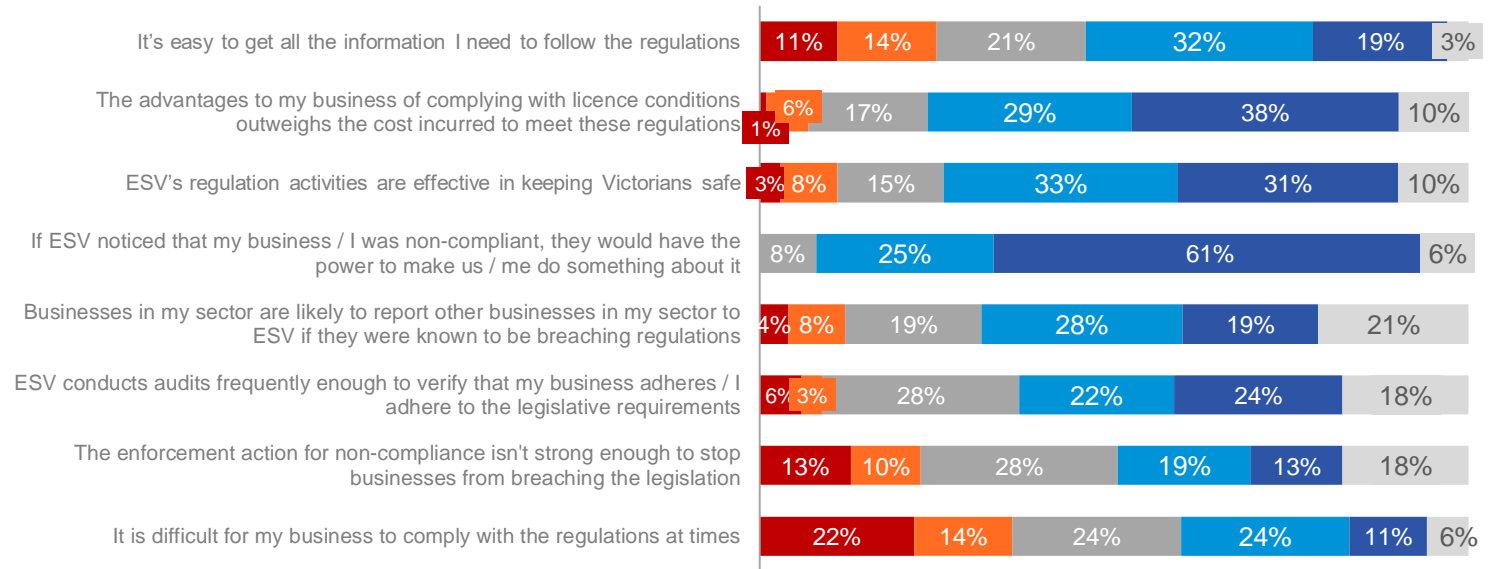
Appliance manufacturers – Relationship with ESV & ease of complying with regulations

Base: Appliance manufacturers (n=72)

Relationship with ESV



Ease of complying with regulations



■ Strongly disagree
 ■ Mildly disagree
 ■ Neither agree nor disagree
 ■ Mildly agree
 ■ Strongly agree
 ■ Don't know

Q14 - To what extent would you agree or disagree that Energy Safe Victoria (ESV) ...?

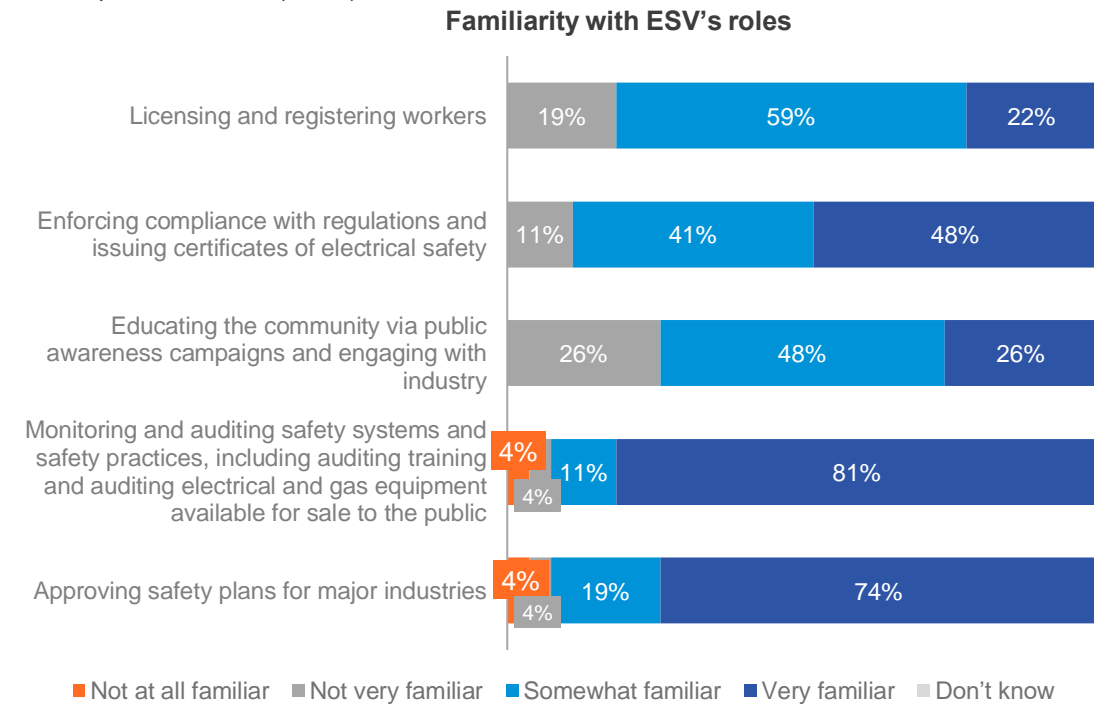
Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

Pipeline licensees

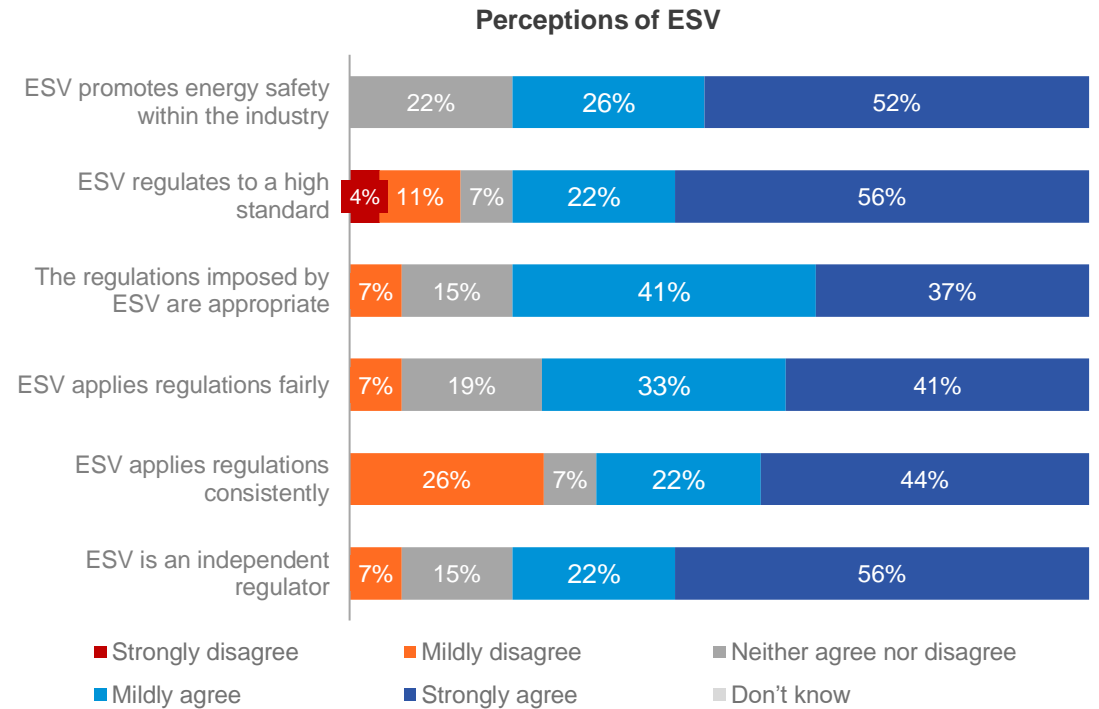
Pipeline licensees – familiarity and perceptions of ESV

Pipeline licensees – Familiarity with ESV’s roles and perceptions of ESV

Base: Pipeline licensees (n=27*)



Q8 - How familiar do you feel with each of ESV’s core roles as a regulator?



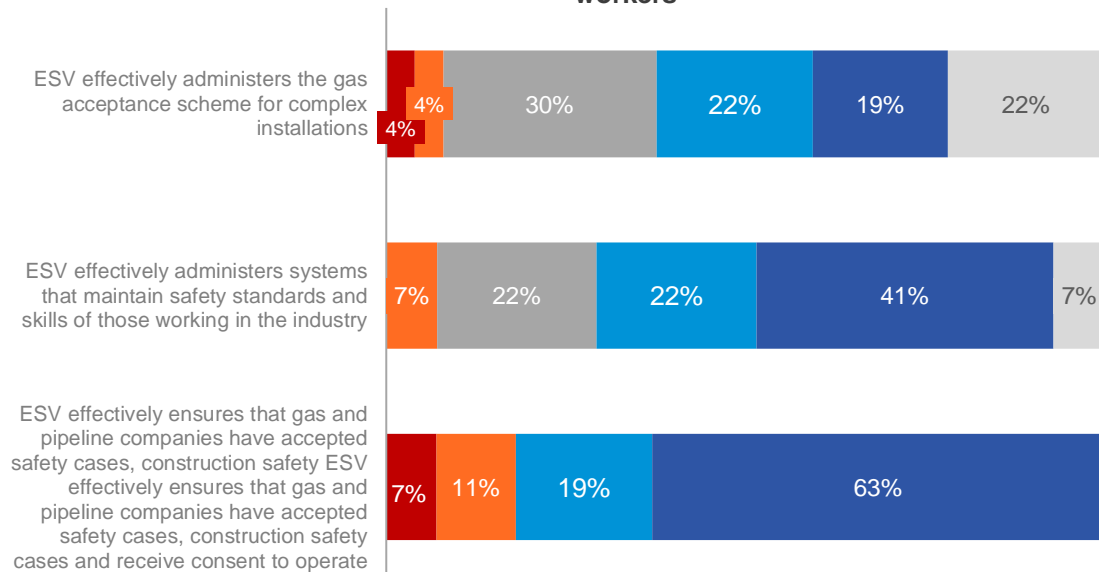
Q9 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Pipeline licensees – licensing, registering, monitoring and auditing

Pipeline licensees – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Pipeline licensees (n=27*)

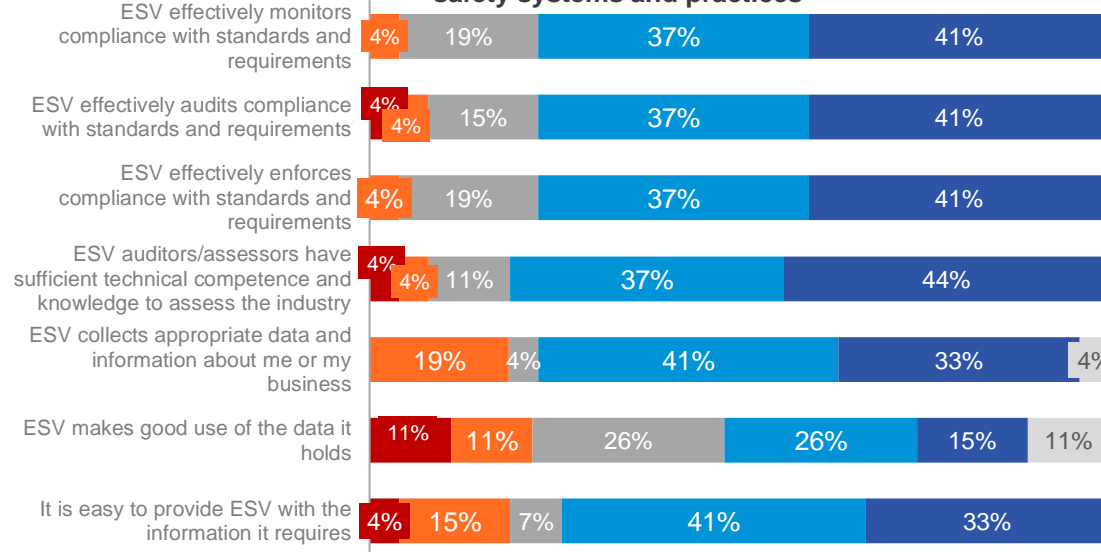
Performance in licensing and registering workers



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q10 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Performance in monitoring and auditing safety systems and practices



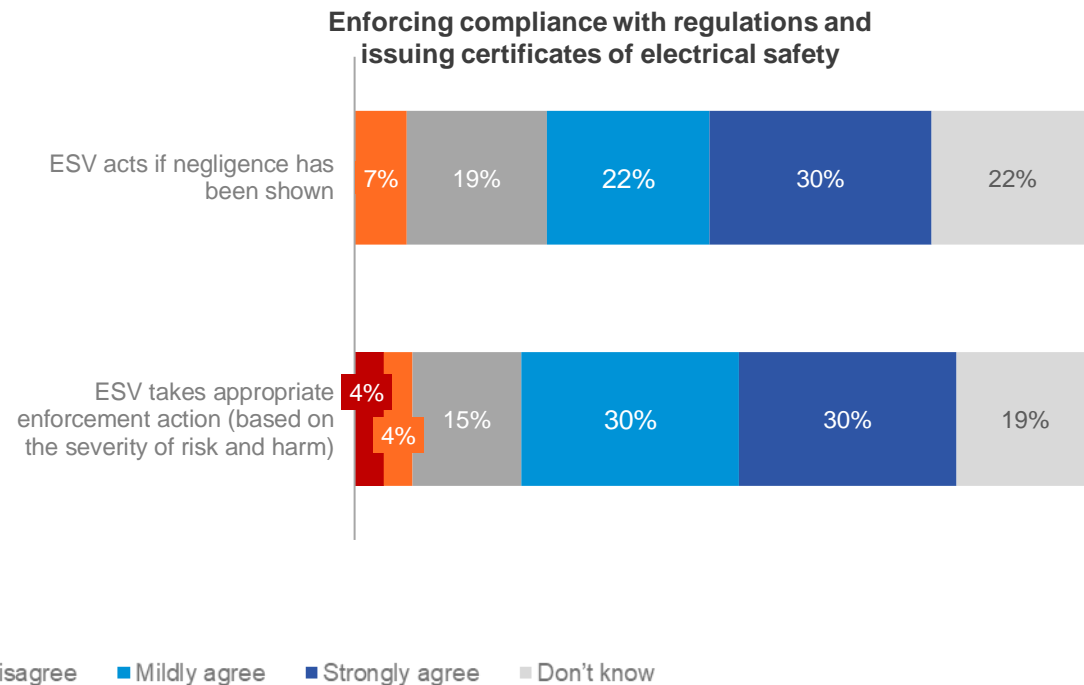
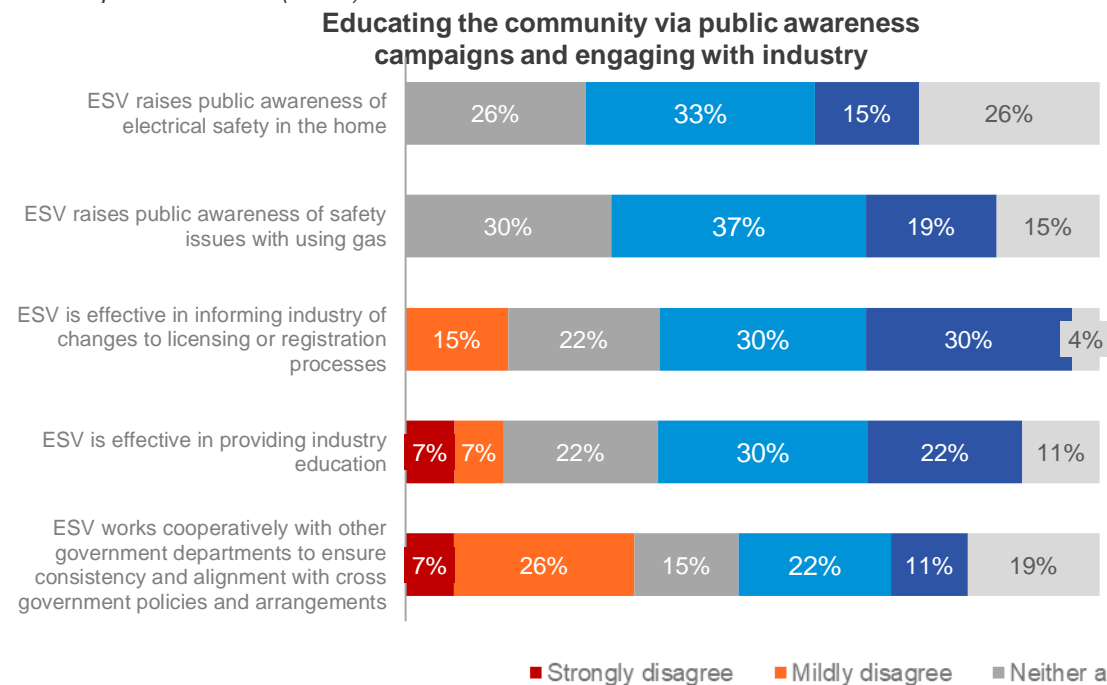
Q11 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

*Note: small sample size; indicative only

Pipeline licensees – licensing, registering, monitoring and auditing

Pipeline licensees – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Pipeline licensees (n=27*)



Q12 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

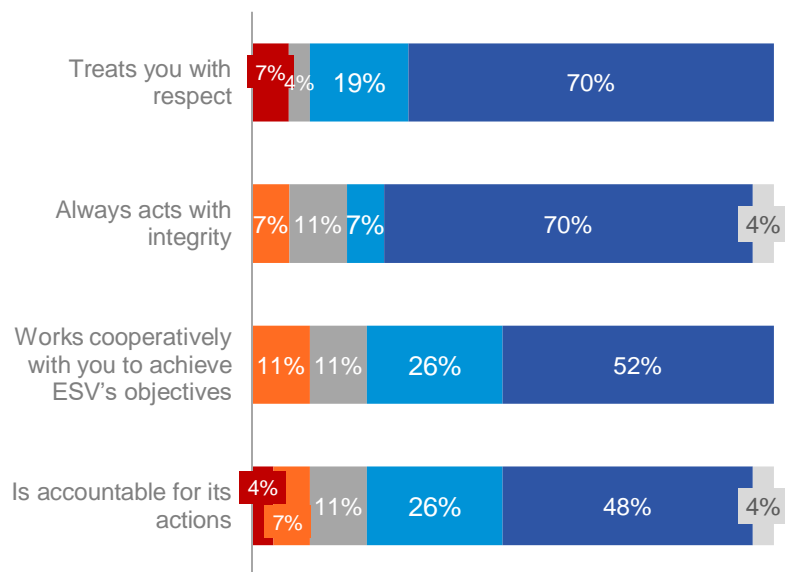
Q13 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Pipeline licensees – licensing, registering, monitoring and auditing

Pipeline licensees – Relationship with ESV & ease of complying with regulations

Base: Pipeline licensees (n=27*)

Relationship with ESV



Ease of complying with regulations



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q14 - To what extent would you agree or disagree that Energy Safe Victoria (ESV)...?

Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

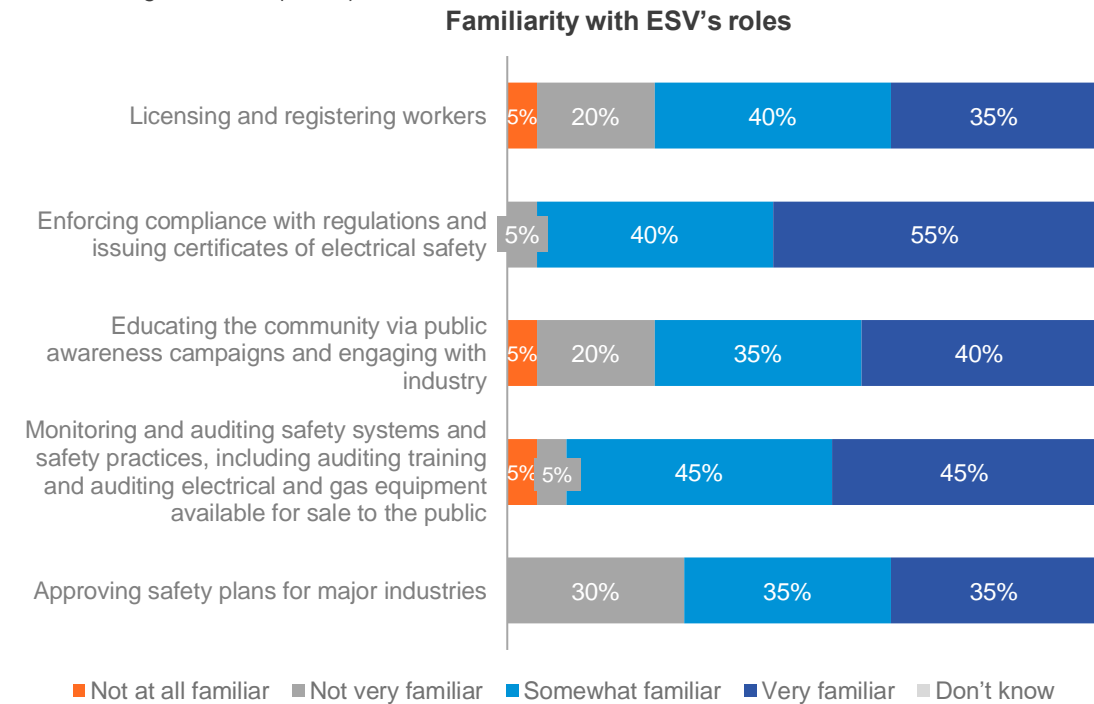
*Note: small sample size; indicative only

Local government

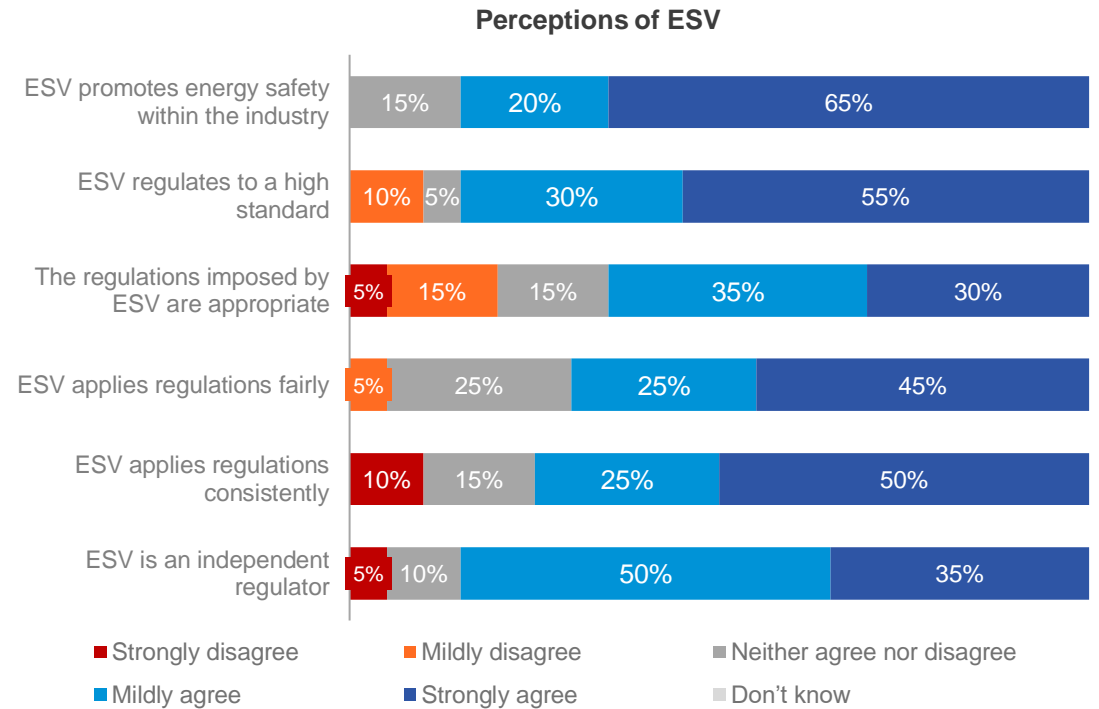
Local government – familiarity and perceptions of ESV

Local government – Familiarity with ESV’s roles and perceptions of ESV

Base: Local government (n=20*)



Q8 - How familiar do you feel with each of ESV’s core roles as a regulator?



Q9 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

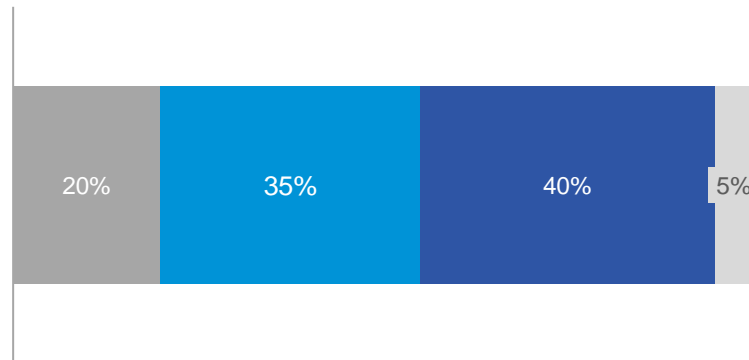
Local government – licensing, registering, monitoring and auditing

Local government – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

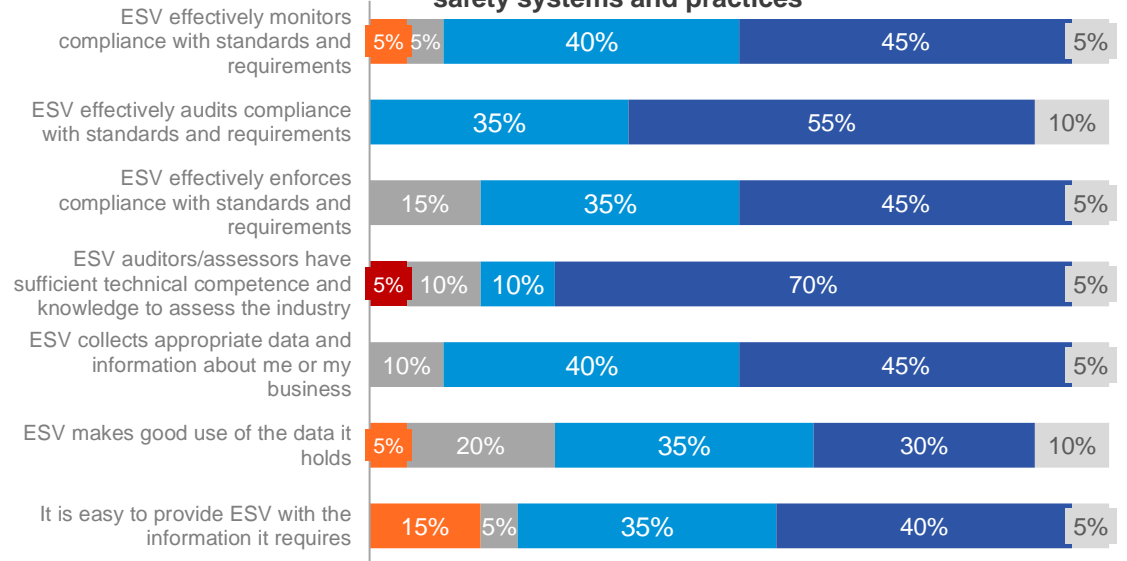
Base: Local government (n=20*)

Performance in licensing and registering workers

ESV effectively administers systems that maintain safety standards and skills of those working in the industry



Performance in monitoring and auditing safety systems and practices



■ Strongly disagree
 ■ Mildly disagree
 ■ Neither agree nor disagree
 ■ Mildly agree
 ■ Strongly agree
 ■ Don't know

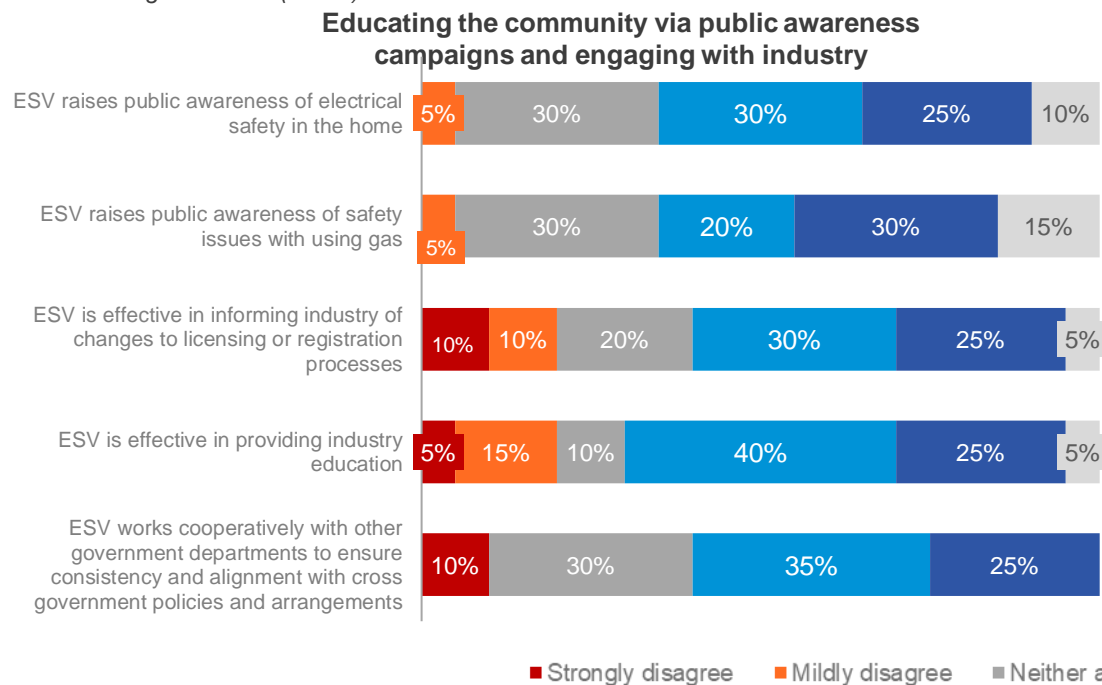
Q10 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Q11 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

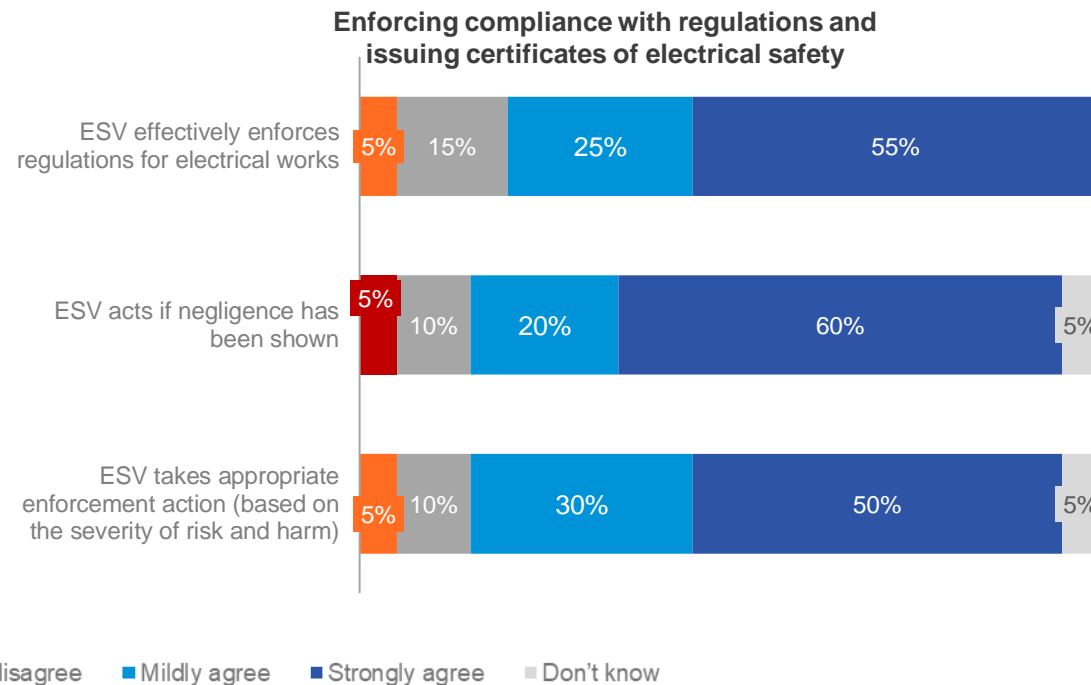
Local government – licensing, registering, monitoring and auditing

Local government – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Local government (n=20*)



Q12 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?



Q13 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

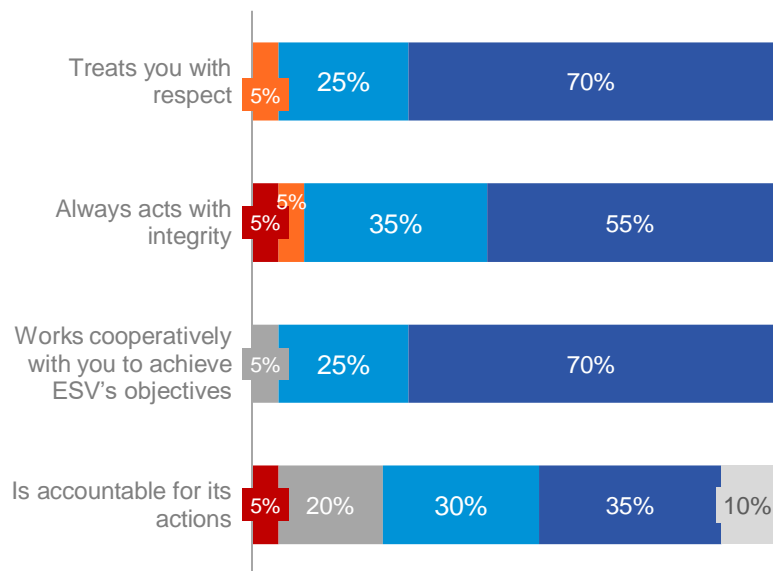
*Note: small sample size; indicative only

Local government – licensing, registering, monitoring and auditing

Local government – Relationship with ESV & ease of complying with regulations

Base: Local government (n=20*)

Relationship with ESV



Ease of complying with regulations



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q14 - To what extent would you agree or disagree that Energy Safe Victoria (ESV)...?

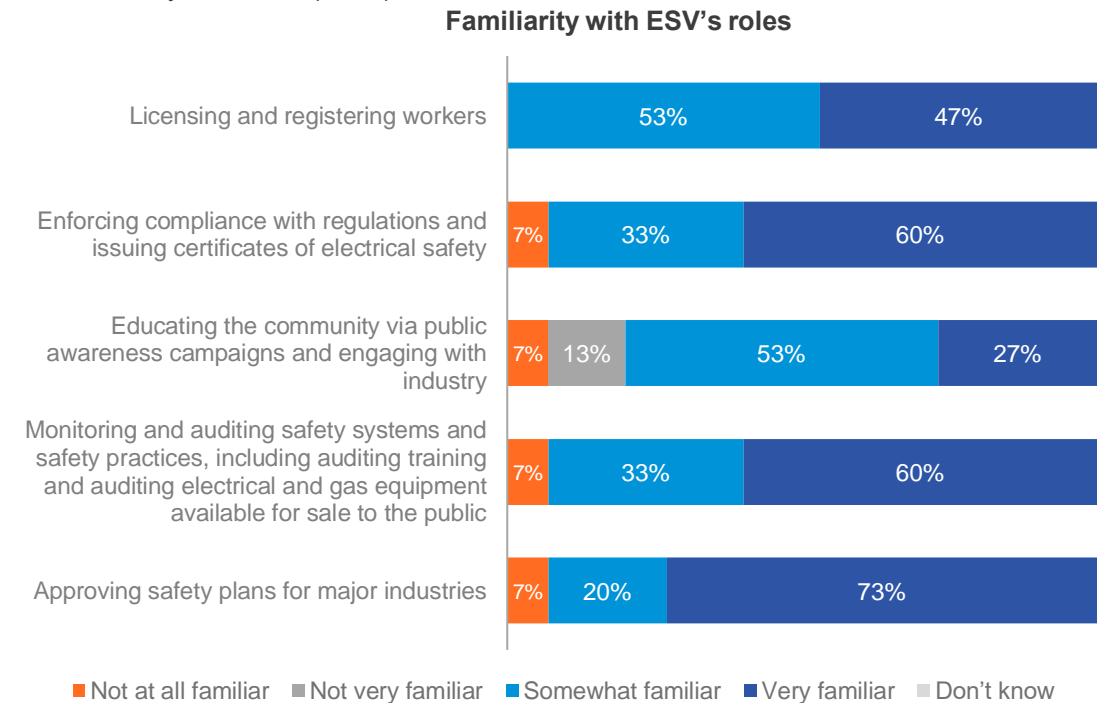
Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?

Electricity distributors

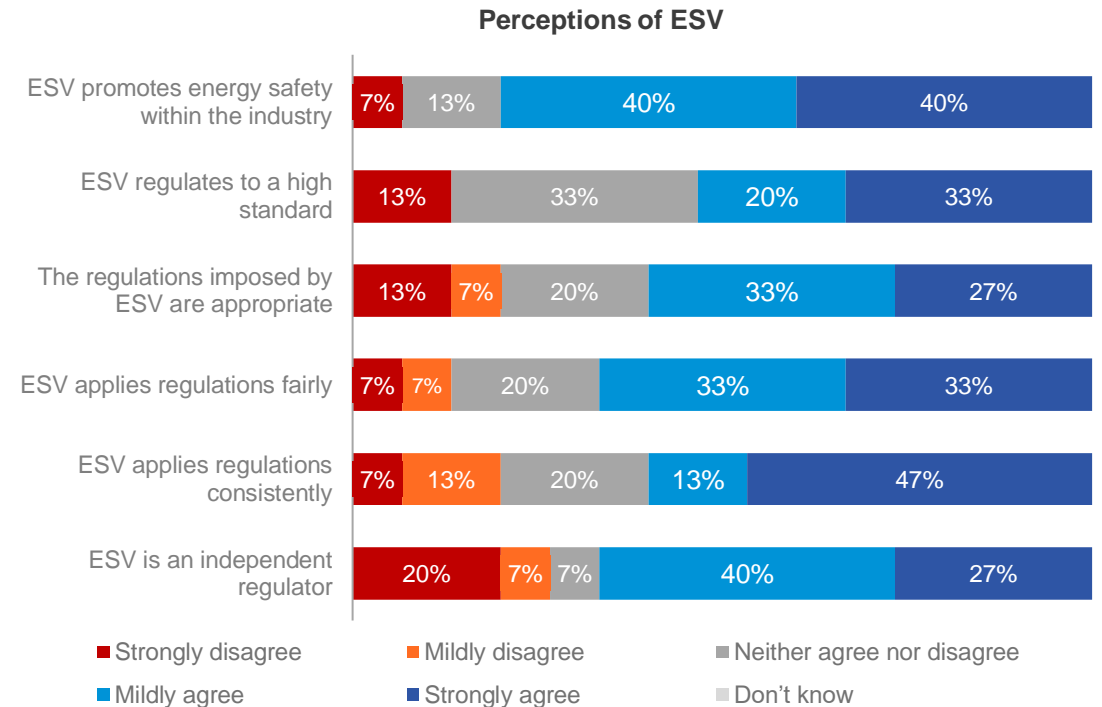
Electricity distributors – familiarity and perceptions of ESV

Electricity distributors – Familiarity with ESV’s roles and perceptions of ESV

Base: Electricity distributors (n=15*)



Q8 - How familiar do you feel with each of ESV’s core roles as a regulator?



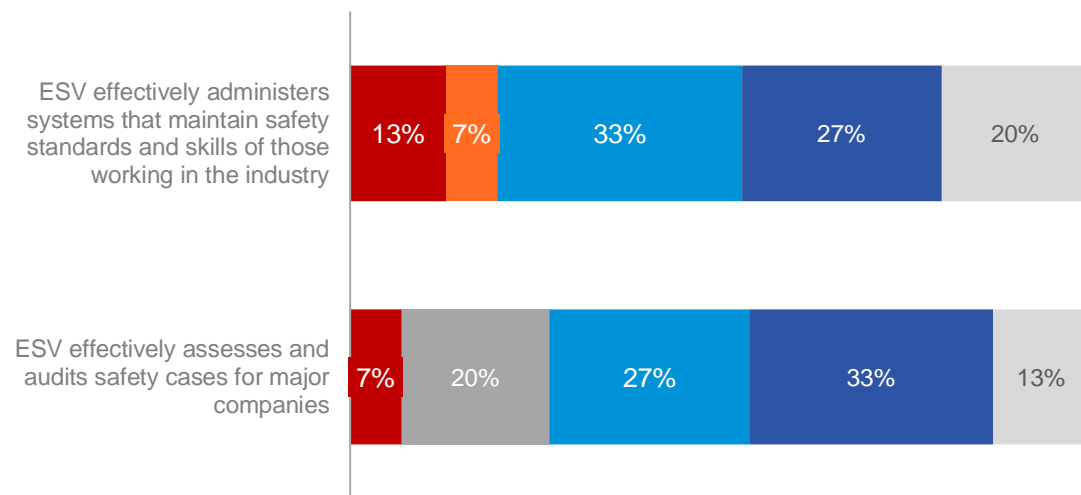
Q9 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Electricity distributors – licensing, registering, monitoring and auditing

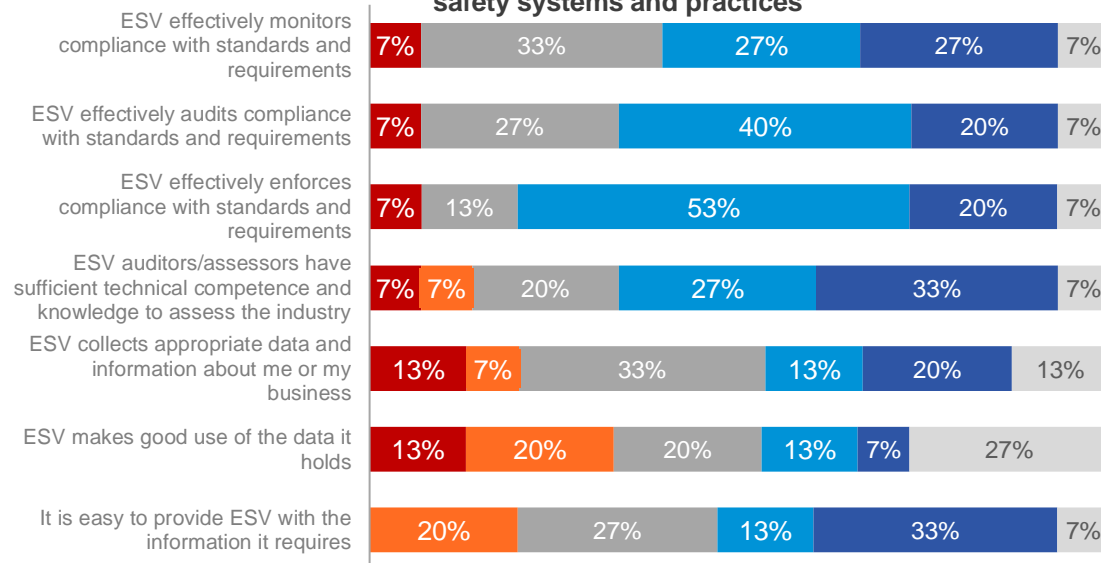
Distributors – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Electricity distributors (n=15*)

Performance in licensing and registering workers



Performance in monitoring and auditing safety systems and practices



■ Strongly disagree
 ■ Mildly disagree
 ■ Neither agree nor disagree
 ■ Mildly agree
 ■ Strongly agree
 ■ Don't know

Q10 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Q11 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

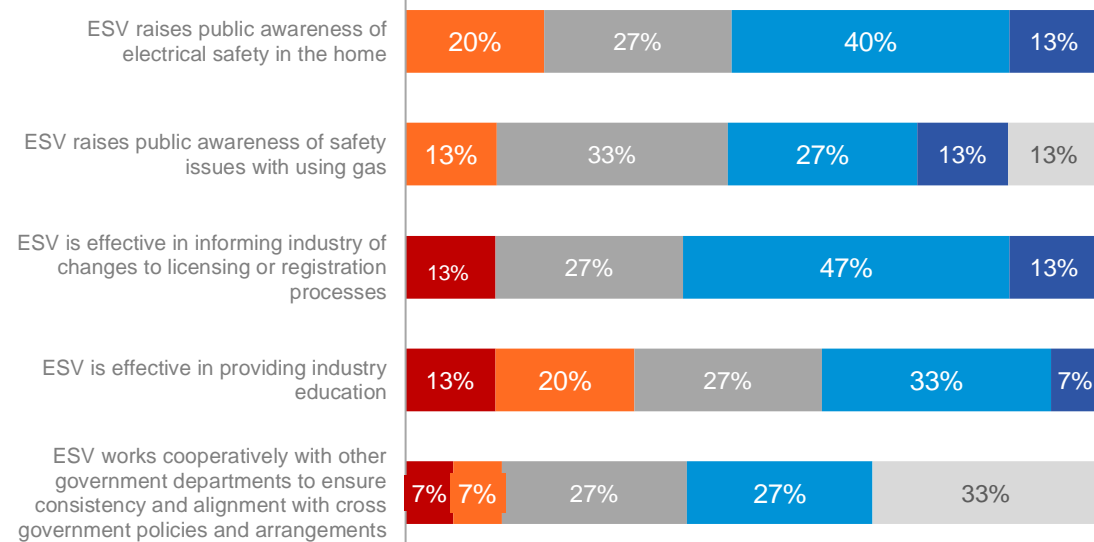
*Note: small sample size; indicative only

Electricity distributors – licensing, registering, monitoring and auditing

Distributors – Performance in licensing and registering workers & monitoring and auditing safety systems and practices

Base: Electricity distributors (n=15*)

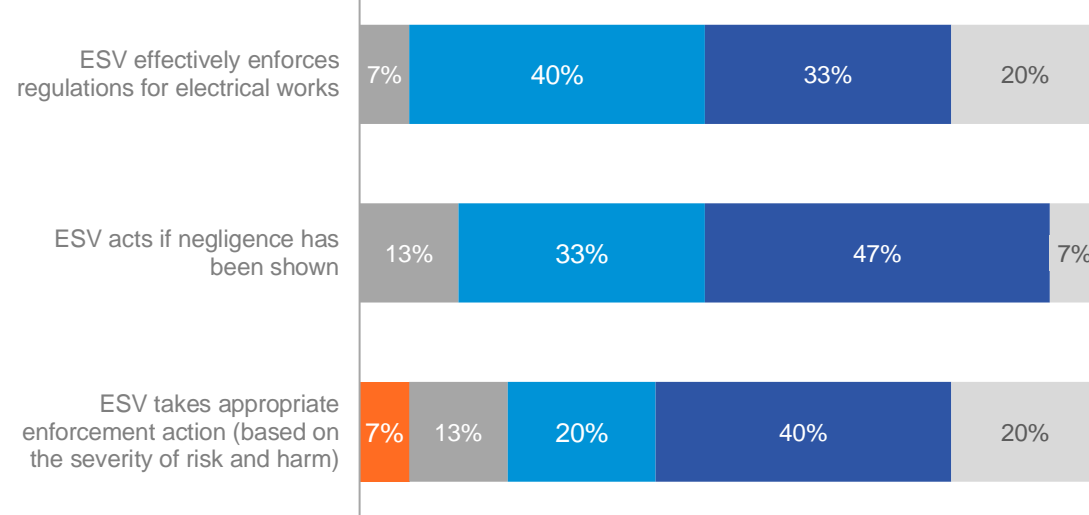
Educating the community via public awareness campaigns and engaging with industry



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q12 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

Enforcing compliance with regulations and issuing certificates of electrical safety



Q13 - To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)?

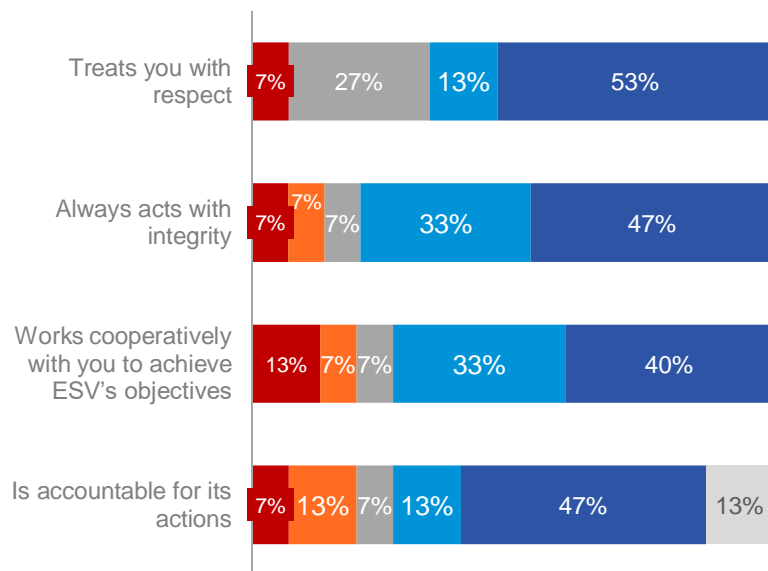
*Note: small sample size; indicative only

Electricity distributors – licensing, registering, monitoring and auditing

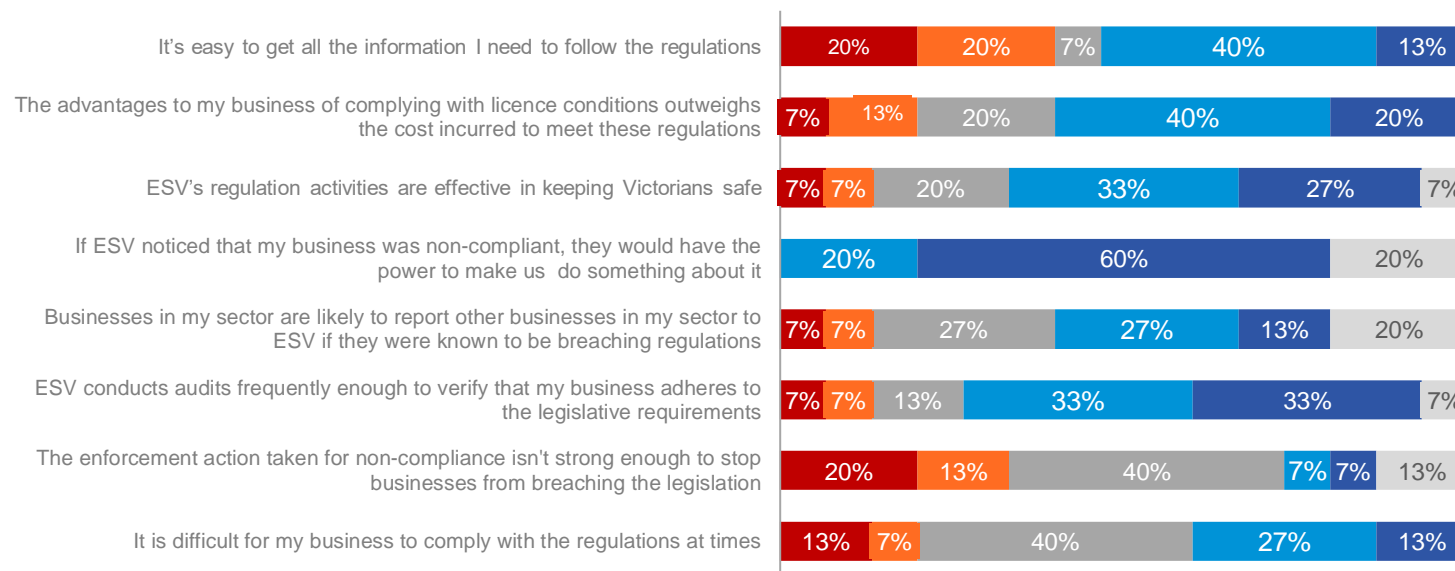
Electricity distributors – Relationship with ESV & ease of complying with regulations

Base: Electricity distributors (n=15*)

Relationship with ESV



Ease of complying with regulations



■ Strongly disagree ■ Mildly disagree ■ Neither agree nor disagree ■ Mildly agree ■ Strongly agree ■ Don't know

Q14 - To what extent would you agree or disagree that Energy Safe Victoria (ESV)...?

Q15 - To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)?



Appendix 2 – Questionnaire

Questionnaire

Final (11/03/2021) **Annual stakeholder survey** Job No.: 21008QT

Energy Safe Victoria

Survey type: Online

Project consultants: Anita Ganguly, Sharon Morris
 Definition of target audience: Stakeholders who are regulated by ESV, as per below – please include stakeholder type in online portal so we can monitor response rates by stakeholder type

Stakeholder type	Definition	Number of contacts
Local government	Arborist management / electric line clearance	68 emails
Distributors	Electricity generators, transmitters, distributors, wholesalers, retailers Gas distributors, retailers, and other gas networks, traction industry orgs	96 emails
Appliance manufacturers	Gas/electrical manufacturers, approvers, importers, wholesalers, or retailers of equipment or appliances, as well as certification bodies	3,270 emails tbc + 5 certification bodies
Pipeline licensees	Pipeline licensees of non-gas pipelines, gas employers (employing inspectors and gasfitters)	120 emails
Electricians	Employers, electricians, lineworkers, inspectors, contractors, installers, gasfitters	62,882 emails
Gas fitters	Licensed gasfitters	2,394 emails

Weights to be applied: TBC
 Sample provided by: ESV
 Emails distributed by: Quantum
 Data to be merged with a previous datafile? No, but this will be an ongoing tracker, so future merges required
 Digital please code all responses as requested (e.g. Strongly Agree = 5, Strongly Disagree = 1)

Introduction

Thank you for taking part in this survey.

This survey is about your perceptions of Energy Safe Victoria (ESV), and should take no more than 10 minutes to complete.

Please be reassured that this survey is anonymous, and we will never use your individual responses on their own. Quantum is an independent market research company and complies with the Australian Privacy Act 1988 and The Research Society's Code of Professional Behaviour.

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Screening

The first few questions are to check if this survey is relevant to you.

ASK IF ELECTRICIAN OR GASFITTER

Q.1. Can we please confirm that you are a licensed [IF ELECTRICIAN: "electrician"; IF GASFITTER: "gasfitter"]?
 SINGLE RESPONSE

Yes 1
 No 2 **TERMINATE**

ASK IF ELECTRICIAN OR GASFITTER

Q.2. Are you currently licensed to work as an [IF ELECTRICIAN: "electrician"; IF GASFITTER: "gasfitter"] in Victoria?
 SINGLE RESPONSE

Yes 1
 No 2 **TERMINATE**

ASK ALL OTHER STAKEHOLDER GROUPS

Q.3. Does your organisation operate in Victoria? SINGLE RESPONSE

Yes 1
 No 2

ASK ALL OTHER STAKEHOLDER GROUPS

Q.4. Does your current role require you to interact with Energy Safe Victoria (ESV)? SINGLE RESPONSE

Yes 1
 No 2 **TERMINATE**

Main survey

The first few questions are about your understanding of ESV's role.

ASK ALL

Q.5. What do you understand Energy Safe Victoria's (ESV) role to be? Please be as detailed as you can.

OPEN ENDED, NON-MANDATORY

ASK ALL

Q.6. Before today, were you aware that Energy Safe Victoria (ESV) is responsible for the safety and technical regulation of [IF DISTRIBUTORS, APPLIANCE MANUFACTURERS: "electricity and electrical appliances, gas and pipelines"; IF LOCAL GOVERNMENT OR ELECTRICIANS: "electricity and electrical appliances"; IF PIPELINE

Quantum Market Research Page 2

LICENSEES, GASFITTERS: "gas and pipelines" in Victoria?

Yes 1
 No 2
 Not sure 3

ASK ALL

Q.7. ESV's role is to regulate the electricity, gas and pipeline industries, to minimise safety risks and promote energy safety and efficiency. How confident are you that ESV's activities effectively minimise risks in the electricity and gas pipeline industries as far as practicable?

Totally confident 1
 Very confident 2
 Somewhat confident 3
 Not very confident 4
 Not at all confident 5
 Don't know 6

ASK ALL

Q.8. How familiar do you feel with each of ESV's core roles as a regulator? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Very familiar	Somewhat familiar	Not very familiar	Not at all familiar	Don't know
1	Licensing and registering workers	1	2	3	4	5
2	Approving safety plans for major industries	1	2	3	4	5
3	Monitoring and auditing safety systems and safety practices, including auditing training and auditing electrical and gas equipment available for sale to the public	1	2	3	4	5
4	Educating the community via public awareness campaigns and engaging with industry	1	2	3	4	5
5	Enforcing compliance with regulations and issuing certificates of electrical safety	1	2	3	4	5

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Questionnaire

The next question is about ESV's overall performance as a regulator.

ASK ALL

Q.9. To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)? SINGLE RESPONSE

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	ESV is an independent regulator	5	4	3	2	1	6
2	ESV regulates to a high standard	5	4	3	2	1	6
3	ESV promotes energy safety within the industry	5	4	3	2	1	6
4	The regulations imposed by ESV are appropriate	5	4	3	2	1	6
5	ESV applies regulations fairly	5	4	3	2	1	6
6	ESV applies regulations consistently	5	4	3	2	1	6

The next question is about ESV's performance in licensing and registering workers and approving safety plans for major industries.

ASK ALL

Q.10. To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	ESV effectively administers systems that maintain safety standards and skills of those working in the industry	5	4	3	2	1	6
2	ASK IF ELECTRICIANS: ESV effectively licenses electricians	5	4	3	2	1	6
3	ASK IF ELECTRICIANS: ESV effectively registers electrical contractors and lineworkers	5	4	3	2	1	6
4	ASK IF ELECTRICIANS: ESV's licensing and registration process is straightforward	5	4	3	2	1	6
5	ASK IF ELECTRICITY DISTRIBUTOR: ESV effectively assesses and audits safety cases for major companies	5	4	3	2	1	6

6	ASK IF GAS DISTRIBUTOR, PIPELINE LICENSEES, GASFITTERS: ESV effectively administers the gas acceptance scheme for complex installations	5	4	3	2	1	6
7	ASK IF GAS DISTRIBUTOR, PIPELINE LICENSEES, GASFITTERS: ESV effectively ensures that gas and pipeline companies have accepted safety cases, construction safety cases and receive consent to operate	5	4	3	2	1	6

The next question is about ESV's performance in monitoring and auditing safety systems and safety practices, including auditing training and auditing electrical and gas equipment available for sale to the public.

ASK ALL

Q.11. To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	ASK IF DISTRIBUTOR: ESV effectively audits compliance against approved safety cases	5	4	3	2	1	6
2	ESV effectively monitors compliance with standards and requirements	5	4	3	2	1	6
3	ESV effectively audits compliance with standards and requirements	5	4	3	2	1	6
4	ESV effectively enforces compliance with standards and requirements	5	4	3	2	1	6
5	ESV auditors/assessors have sufficient technical competence and knowledge to assess the industry	5	4	3	2	1	6
6	ESV collects appropriate data and information about me or my business	5	4	3	2	1	6
7	ESV makes good use of the data it holds	5	4	3	2	1	6
8	It is easy to provide ESV with the information it requires	5	4	3	2	1	6

The next question is about ESV's performance in educating the community via public awareness campaigns and engaging with industry.

ASK ALL

Q.12. To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	ESV is effective in providing industry education	5	4	3	2	1	6
2	ESV is effective in informing industry of changes to licensing or registration processes	5	4	3	2	1	6
3	ESV raises public awareness of electrical safety in the home	5	4	3	2	1	6
4	ESV raises public awareness of safety issues with using gas	5	4	3	2	1	6
5	ESV works cooperatively with other government departments to ensure consistency and alignment with cross-government policies and arrangements	5	4	3	2	1	6

The next question is about ESV's performance in enforcing compliance with regulations and issuing certificates of electrical safety.

ASK ALL

Q.13. To what extent would you agree or disagree with the following statements about Energy Safe Victoria (ESV)? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	ESV takes appropriate enforcement action (based on the severity of risk and harm)	5	4	3	2	1	6
2	ESV acts if negligence has been shown	5	4	3	2	1	6
3	ASK IF LOCAL GOVERNMENT, ELECTRICITY DISTRIBUTOR, ELECTRICIANS: ESV effectively enforces regulations for electrical works	5	4	3	2	1	6

Questionnaire

ASK ALL

Q.14. To what extent would you agree or disagree that Energy Safe Victoria...? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	Treats you with respect	5	4	3	2	1	6
2	Always acts with integrity	5	4	3	2	1	6
3	Works cooperatively with you to achieve ESV's objectives	5	4	3	2	1	6
4	Is accountable for its actions	5	4	3	2	1	6

The next question is about how easy or difficult it is to comply with the regulations in your business.

ASK ALL

Q.15. To what extent would you agree or disagree with the following statements about your ability to be compliant with regulations and requirements set by Energy Safe Victoria (ESV)? SINGLE RESPONSE; DIGITAL PLEASE CODE AS REQUESTED

	RANDOMISE	Strongly agree	Mildly agree	Neither agree nor disagree	Mildly disagree	Strongly disagree	Don't know
1	It's easy to get all the information I need to follow the regulations	5	4	3	2	1	6
2	The advantages [If LOCAL GOVERNMENT, DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "to my business"] of complying with licence conditions outweighs the cost incurred to meet these regulations	5	4	3	2	1	6
3	ESV's regulation activities are effective in keeping Victorians safe	5	4	3	2	1	6
4	If ESV noticed that [If LOCAL GOVERNMENT, DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "my business"; If ELECTRICIAN, GASFITTER: "I"] was non-compliant, they would have the power to make [If LOCAL GOVERNMENT, DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "us"; If ELECTRICIAN, GASFITTER: "me"] do something about it	5	4	3	2	1	6
5	[If LOCAL GOVERNMENT: "Organisations / businesses"; If DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "Businesses in my sector"; If ELECTRICIAN: "Victorian	5	4	3	2	1	6

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	electricians"; If GASFITTER: "Victorian gasfitters"] are likely to report other [If LOCAL GOVERNMENT: "Organisations / businesses"; If DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "Businesses in my sector"; If ELECTRICIAN: "Victorian electricians"; If GASFITTER: "Victorian gasfitters"] to ESV if they were known to be breaching regulations								
6	ESV conducts audits frequently enough to verify that [If LOCAL GOVERNMENT, DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "my business adheres"; If ELECTRICIAN, GASFITTER: "I adhere"] to the legislative requirements	5	4	3	2	1	6		
7	The enforcement action taken for non-compliance with the legislative requirements isn't strong enough to stop [If LOCAL GOVERNMENT, DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "businesses"; If ELECTRICIAN, GASFITTER: "me"] from breaching the legislative requirements	5	4	3	2	1	6		
8	It is difficult for [If LOCAL GOVERNMENT: "my organisation"; If DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "my business"; If ELECTRICIAN, GASFITTER: "me"] to comply with the regulations at times	5	4	3	2	1	6		

ASK IF Q.15.8 = CODES 4-5 (AGREE)

Q.16. You indicated that it is difficult for [If LOCAL GOVERNMENT: "your organisation"; If DISTRIBUTOR, APPLIANCE MANUFACTURER, PIPELINE LICENSEE: "your business"; If ELECTRICIAN, GASFITTER: "you"] to comply with the regulations at times. Please tell us in as much detail as possible why it is difficult to comply with the regulations.

OPEN END

ASK ALL

Q.17. Please provide any other feedback about Energy Safe Victoria (ESV) here. If you have no additional feedback, please type "none".

OPEN ENDED

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Demographics

And finally, just a couple more questions about you, so that we can understand how different people have answered these questions. As this is market research, it is carried out in compliance with the Privacy Act 1988 and the information you provided will be used only for research purposes.

And finally, just a few more questions about you, so that we can understand how different people have answered these questions. All your answers will be kept confidential and will only be used for research purposes.

ASK IF ELECTRICIAN OR GASFITTER

Q.18. How long have you been working as an [If ELECTRICIAN: "electrician"; If GASFITTER: "gasfitter"]? SINGLE RESPONSE

Less than 2 years 1
 2 years to less than 5 years 2
 5 years to less than 10 years 3
 10 years to less than 20 years 4
 20 years or more 5

ASK IF ELECTRICIAN OR GASFITTER

Q.19. Where do you undertake the majority of your work? SINGLE RESPONSE

Metro Melbourne 1
 Regional Victoria 2
 Equally split between Metro Melbourne and Regional Victoria 3
 Unsure 4

End with thanks (all):
 Thank you for assisting us today. Your response to this questionnaire will be kept strictly confidential and will be used only for research purposes. If you have any queries or concerns, please contact us on survevs@qmr.com.au

Ref: QMR ESV Annual Stakeholder Survey 2021_Final_edits

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