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Survey of Residential Customers of Electricity and Natural Gas in New South Wales: Effectiveness of Retail Competition

February 28, 2013

- Prepared for -

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1. EXECUTIVE SUMMARY

The objective of the study was to assist the AEMC in their review of competition in the electricity and gas retail markets for residential customers in New South Wales. Whether retail competition is found to be present or not, it will lead to various courses of action, e.g., further promoting competition if it is found to be absent or weak, or removing regulations/controls if competition is flourishing.

One thousand and one people in New South Wales were surveyed by telephone or online in November-December 2012 to learn of their attitudes and behaviours regarding the home use of electricity and gas and the retail companies that supply the services. Approximately 40% of the sample were mains gas users and everyone (except for a few) stated they were electricity users. Key findings of the study were:

- 90% were aware they had a choice of electricity suppliers. The rate exceeded 85% for gas.
- Customers largely divided their electricity and gas business among a few major companies: AGL, Energy Australia, and Origin. For example, AGL was the retailer for 59% of gas users. Customers were able to name alternatives to the energy companies they use.
- Nearly 70% of the sample said they had been approached by an electricity company offering to sell the service; the rate for gas was only half that. About 1 in 5 had actively sought out information from energy retailers.
- Information received as a result of electricity and gas sales encounters was not rated highly. Material was unclear and of limited usefulness for decision making.
- Pricing issues dominated the reasons why customers investigated the switching of retail providers and dominated the reasons given for a switch after it has been carried out. Customer service issues, new products/technologies/services were rarely mentioned. Energy saving activities within the last 12 months were common (84%). Cost savings was again the leading reason for the actions.
- About half of the participants had switched electricity companies at least once in the last 10 years, and a third had switched gas companies that often. Switching was generally an unproblematic process and only about 1 in 10 were dissatisfied with the new company.
- Satisfaction with the current supplier and inertia were the primary reasons mentioned for not switching electricity or gas retailers. Only 10%-20% had plans to switch electricity or gas companies in the next 12 months. Those who did have

such plans relied on internet searches and price comparisons sites for information. The awareness of such sites was low however within the total sample (20%).

- A minority of customers reported experiencing unethical or unfair practices by their energy retailers. A majority had not contacted their companies in the past year. Only 13% had ever lodged a complaint about their electricity or gas company.
- Across the issues and topics mentioned some differences were observed on demographic variables such as home location (metro vs. non-metro), household income, or bill amount. For example, non- metro customers were more likely to be contacted by phone for sales calls than metro customers. Metro customers were more likely to be offered a combined electricity and gas offer. Metro customers were more critical of the sales information received from gas companies but were also more satisfied with the outcomes of switching.

The survey results strongly suggest the presence of an active retail competitive environment in New South Wales for residential electricity and gas customers. Retail options are known to residents across the state; switching occurs; companies are not cited for placing barriers in the way of switching. Efforts by companies to improve the clarity and usefulness of sales literature would likely be appreciated by customers. Educational/promotional programs to improve awareness of helpful price comparator websites would also help to create a better informed energy customer.

2. INTRODUCTION

2.1 Background and Objectives

Retail competition in the electricity and natural gas markets has been operating in New South Wales for just over a decade. What is the current state of competition as judged by small-scale residential and business energy users? What are their attitudes and actions in regard to these energy supplies and suppliers?

The Australian Energy Market Commission (AEMC) is concerned with these questions. It was established in July 2005 by the Council of Australian Governments, through its Ministerial Council on Energy (MCE). The AEMC is responsible for rules and policy advice covering the National Electricity Market (NEM) and aspects of the natural gas markets.

The AEMC is empowered by the Australian Energy Market Agreement (AEMA) to carry out reviews of retail competition in the energy markets across the country, including the commissioning of consumer research. The first review was conducted in Victoria in 2007. South Australia and the ACT followed in 2008 and 2010 respectively. The current study of NSW is thus the fourth in the series.

According to the AEMA, the aim of the competition reviews is to assess the effectiveness of competition in the electricity and gas retail markets for the purpose of the retention, removal, or reintroduction of retail energy price controls.

Upon review of the data, the AEMC will recommend ways to:

- Phase out price controls if competition is found to be effective; or
- Promote competition where competition is found to be less than effective.

The assessment is required to be conducted on the basis of criteria developed by the MCE in consultation with the AEMC and other stakeholders. The criteria focus on:

- Independent rivalry within the market
- Ability of suppliers to enter the market
- The exercise of market choice by customers
- Differentiated products and services
- Price and profit margins
- Customer switching

2.2 Roy Morgan Research's Role

Roy Morgan Research was commissioned by the AEMC in November 2012 to carry out quantitative and qualitative research with "small customers" of natural gas and/or electricity in New South Wales. Three studies were undertaken:

- Qualitative focus groups with business and residential energy users of electricity and gas.
- A quantitative survey of 1000 residential energy customers across NSW.
- A quantitative survey of 500 business energy customers.

Focus groups reveal attitudes held and behaviours undertaken by people as expressed in their own voice. They explore the reasons and motivations behind energy-related actions and beliefs. The focus groups look in depth at a small number of people. The quantitative method complements the qualitative by examining a larger number of people to learn, broadly speaking, what percentage of the population holds various views and engages in certain actions with respect to the energy market.

This report focuses on only the second item listed, the quantitative phase with residential energy users. Separate reports will be issued on the quantitative survey of businesses and a qualitative analysis of attitudes drawn from four focus groups held in metro and non-metro New South Wales. Taken together, the reports provide customer input to the AEMC's review of the retail energy marketplace in NSW relating to the established criteria described above.

2.3 Research Considerations

The approach taken to this aspect of the required NSW research was guided by the following considerations:

- There were two target groups of interest: small-scale[1] residential users of electricity and small-scale residential users of mains natural gas.
- A survey method was required that did not bias or under-represent any particular demographic group.
- A survey was requested with "statistically significant" sample sizes by energy type and network provider.

[1] For purposes of the sampling, all residential use of the energy sources was considered small scale.

- The topics of interest for the survey included:
    - Awareness of competition and opportunities to choose and switch energy retailers;
    - The extent to which the respondent switches energy retailers or considers switching (and the reasons for that switching behaviour);
    - The extent to which small customers respond to retailer marketing activities;
    - The ease of obtaining, understanding and comparing information about energy options;
    - Attitudes to products offered by energy retailers;
    - Understanding and use of "time of use" pricing;
    - Changes of attitudes and behaviour since 2002 when full retail contestability commenced in NSW;
    - Demographic questions such as home location (metro vs. regional), age, gender, etc. which may enrich an analysis of perceived competiveness in the electricity and gas markets.

3. METHODOLOGY

3.1 Sample size/methodology

A target of 1000 completed surveys was established and a dual approach was taken for the procedure combining telephone (CATI: computer assisted telephone interviewing) and internet survey techniques (CAWI: computer assisted web interviewing).

The dual approach was adopted because the ownership of home computers and home internet connections is not uniform across age and income, making the sole use of a CAWI technique problematic for data validity especially if attitudes toward the key energy issues are affected by computer ownership. To address this, roughly one-quarter of the sample completed the study by phone. These people were 60 years and older or had a household income of $30,000 or less. People in these demographic groups are less likely to be reachable for an internet survey. The remaining three-quarters of the sample completed the online version of the survey.

Sampling quotas were established on a state region variable utilising the boundaries set in NSW government planning documents[2] used to guide development initiatives. The 18

[2] See http://www.2021.nsw.gov.au/regions

regions are shown in Table 1 next to the most recently available population figures and the sample quotas. Assignment rules were set up so that a given home postcode assigned the household to one of the 18 regions. Regions were identified as metropolitan (M) or non-metropolitan (NM) following standard Roy Morgan Research practice. There were 7 metro and 11 non-metro areas.

Because consumers cannot be assumed to know their energy network provider as distinct from their retailer (whose name is on the quarterly bill), quotas for the 18 regions were used in part to ensure that all network providers of energy services in NSW were covered. Survey data have been aggregated across the regions; data on individual network providers have not been collected or reported.

Table 1. Geographical regions used for quotas

NSW 2021 Regions	18+ Pop (Jun-12)	Sample
Central Coast (M)	258,232	**45**
Central West (NM)	156,307	**27**
Eastern/Inner Sydney (M)	804,463	**140**
Far West (NM)	19,797	**3**
Hunter (NM)	518,669	**91**
Illawara (NM)	345,932	**60**
Mid North Coast (NM)	207,626	**36**
Murray/Lower Darling (NM)	91,101	**16**
New England North West (NM)	147,504	**26**
Northern Sydney (M)	485,382	**85**
Northern Beaches Sydney (M)	199,948	**35**
Northern Rivers (NM)	235,101	**41**
Orana (NM)	78,334	**14**
Riverina (NM)	133,264	**23**
South East NSW (NM)	174,124	**30**
South Western Sydney (M)	618,255	**108**
Southern Sydney (M)	377,974	**66**
Western Sydney (M)	875,630	**153**

3.2 Screening qualifications/ sample sourcing

A qualified respondent was defined as someone 18 years or older responsible in full or in part for decisions about the purchase of electricity or natural gas. People were excluded if they or anyone in the immediate household worked for a gas, advertising, market research, or electricity company, or worked in the field of energy policy/regulation.

The residential sample was drawn from Roy Morgan Research's consumer panel. Members of the panel are incentivised for survey participation via a points scheme. Points can be redeemed either for vouchers or charitable donations.

3.3 The questionnaire

The questionnaire was prepared jointly by Roy Morgan Research and the AEMC project team members. It was programmed, quality tested, and modified to suit the CATI or CAWI survey administration technique. The survey was approximately 15 minutes in length.

3.4 Field period

The CATI portion of the data collection took place between 30 November 2012 and 10 December 2012. The CAWI portion took place between 5 December 2012 and 14 December 2012.

A total of 1001 completed surveys was achieved. Two hundred sixty eight (268) were completed by CATI and 733 online. There were 999 who stated that they used electricity in the home and 386 who used mains natural gas.

4. MAIN FINDINGS

4.1 A Note on the Presentation of Results

Some survey questions allowed for single answers only; others allowed for multiple answers. In the former case, answers may not total to 100% due to rounding. In the latter case, answers will usually well exceed 100%.

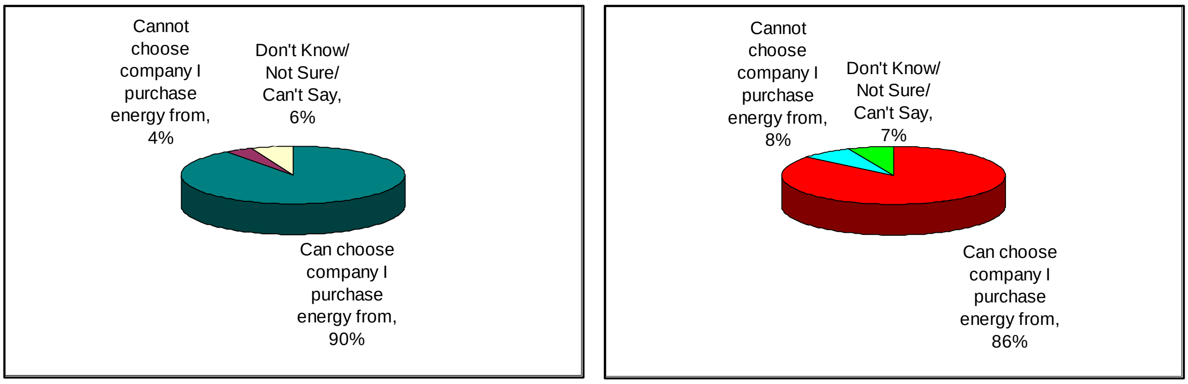
Due to space considerations and clarity, some response options are not shown in the Figures if they received a small response (often set at under 5%). Complete Figures showing all the responses are included in the appendix.

Answers to some survey questions are not shown as tables or figures. They are incorporated into the text of the report. Additional analyses of the responses were run to determine the effect of geographic location (metro vs. non-metro), household income (divided into two categories, Low: Up to $75,000 vs. High: above $75,000), electricity bill (Low: up to $400/month, High: above $400/ month) and gas bill (Low: up to $300/quarter, High: $300 and above). Where there were significant effects of these variables at the 95% confidence level or beyond, they are discussed in the text.

4.2 Energy Choice and Service Provider

Respondents had a high degree of awareness of their ability to choose an energy retailer. Nearly everyone stated they could choose their energy retailer in New South Wales (Figure 1). This provides some evidence for the presence of retail competition in the NSW retail energy market. There was a significant effect of geographical region on choice for electricity (91% in metro areas, 86% in non-metro areas). Nevertheless, there was still a high degree of awareness in non-metro as well as metro areas.

Figure 1. Energy[3] Supplier: Ability to Choose (left panel: electricity, right panel: gas)

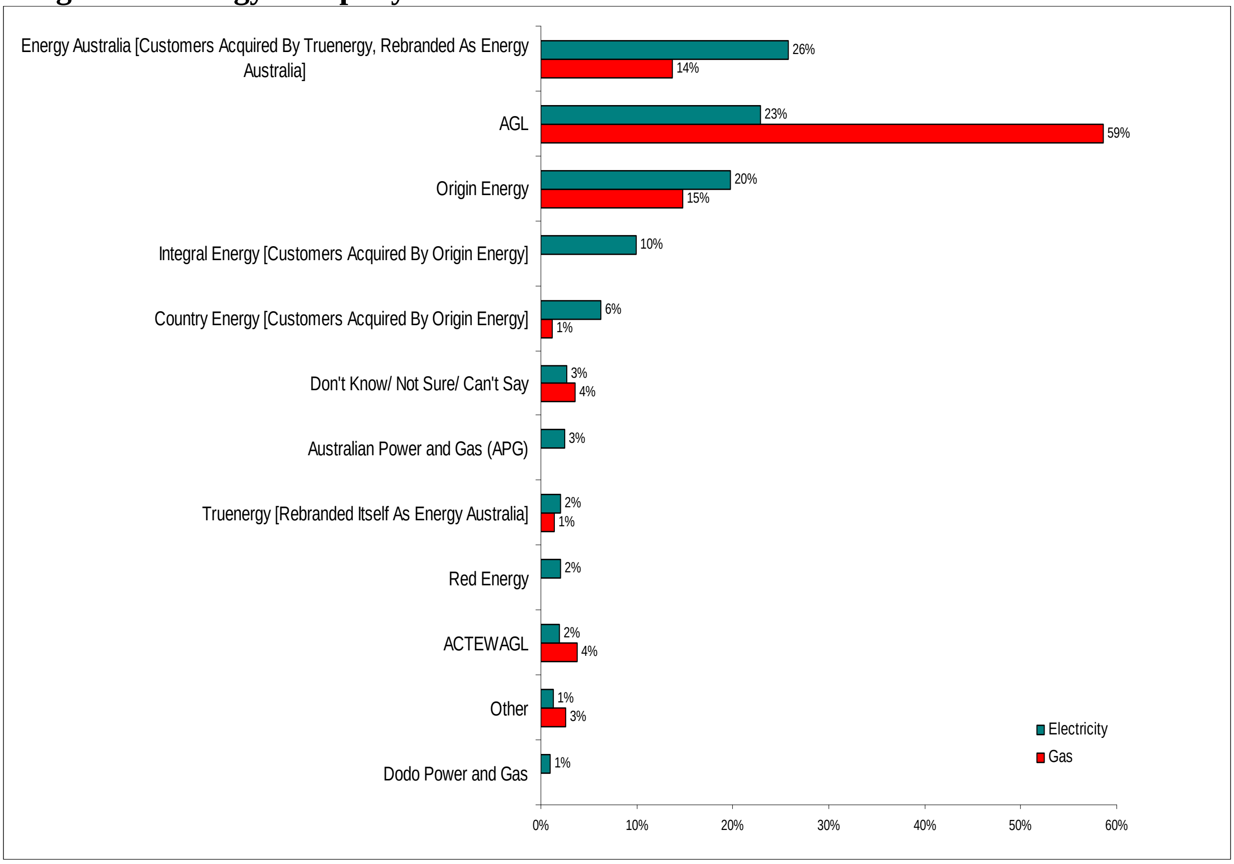


QE4/QG4. As far as you are aware, which of the following applies?
Base: Total use electricity in household (n=999), total use piped gas (n=386)

[3] Throughout this report to economise on space and improve readability we use the word "energy" in place of specific references to electricity and/or gas. The survey (see Section 9) shows the question wording actually seen or heard by respondents.

Figure 2 shows that AGL, at 59%, was the dominant gas retailer for customers in NSW. Electricity was more evenly divided among three companies: Origin, AGL, and Energy Australia. AGL's share of the market was significantly higher among those with a lower electricity bill (27%) or a lower gas bill (66%). There were regional differences as well. Energy Australia was stronger in metro (32%) than non-metro (13%) for electricity. AGL's share of gas was 63% in metro areas vs. 43% in non-metro. Not surprisingly, mentions of Country Energy favoured non-metro (16%) rather than metro (1%).

Figure 2. Energy Company Used[4]



QE5/QG5. Which company do you buy energy from for your current dwelling in New South Wales?
Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)
(**Note**: Some companies were not mentioned and were not charted. These were Aurora, Diamond Energy, Momentum Energy, Simply Energy, Powerdirect, and Sanctuary)

Although a few retailers dominated the list of companies used, consumers felt they had a wide array of choices available, especially for electricity where nine companies were identified by at least 5% of the respondents although some have merged (Figure 3). The diversity of gas choices was not as great. Overall, the data here support the premise that retail competitiveness is healthy in NSW.

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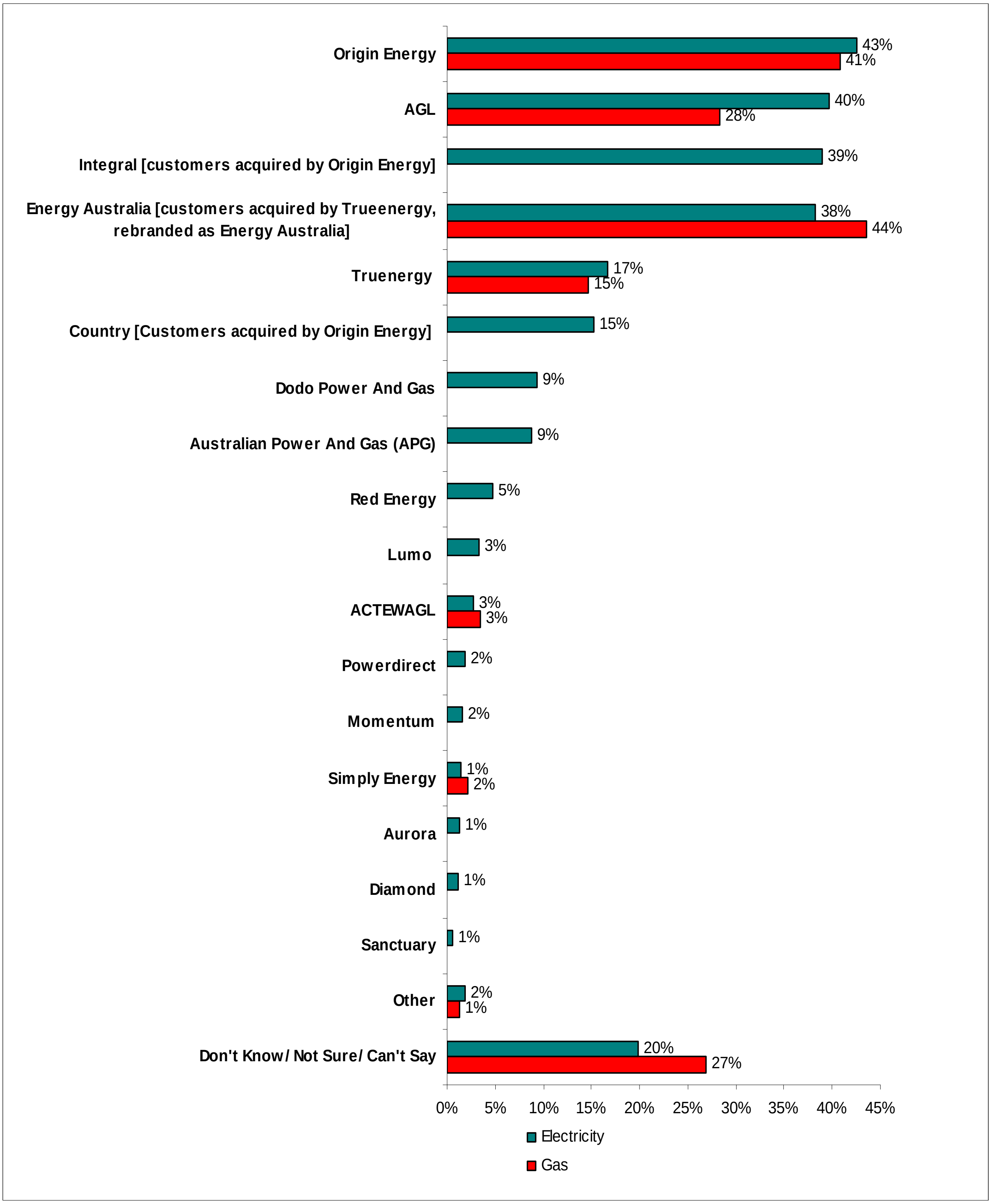
[4] Because of mergers and consolidations in the industry, the additional parenthetical information shown with company names in Figure 2 was available to telephone interviewers and to the respondents who completed the online survey to assist with the choice of an answer.

Figure 3. Companies You Can Buy Energy From

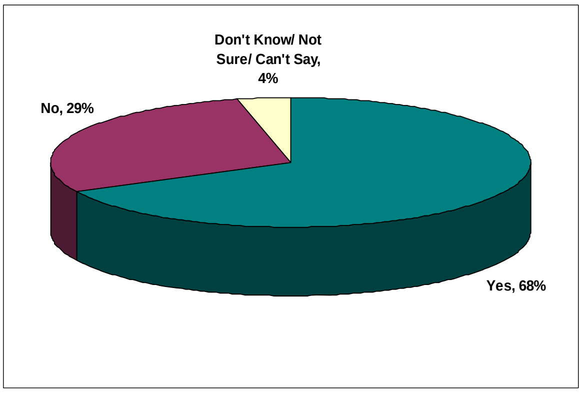


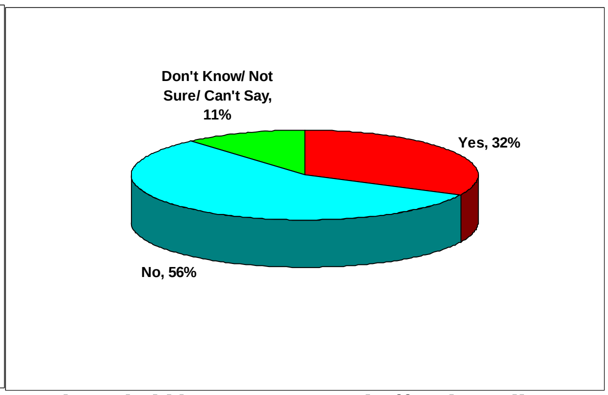
QE5a/Q5Ga. Which other companies do you THINK you could buy energy from for your current dwelling in New South Wales?
Base: Total who named an electricity company in QE5 (n=963); Total who named gas company in QG5 (n=373)

4.2 The Energy Purchase Process

Nearly 70% of customers said they were approached by an electricity company with an offer to buy electricity. The rate was higher in metro NSW (72%) than in non-metro areas of the state (58%). The reported rate of retailer approaches for gas was far lower than for electricity (32%, see Figure 4). It increased to 36% among those with a lower gas bill. The lower rate for gas approaches may be tied to the lower number of gas retailers, which can be seen in Figure 2 and 3, and therefore a lesser degree of competition for residential energy accounts. Overall, it appears reasonable to conclude from this data that there is active vying for customers' business, at least in the case of electricity. The presence of retail competition as measured by sales approaches could be further strengthened for gas in the state.

Figure 4. Sales Approaches by Energy Companies
(left panel: electricity, right panel: gas)



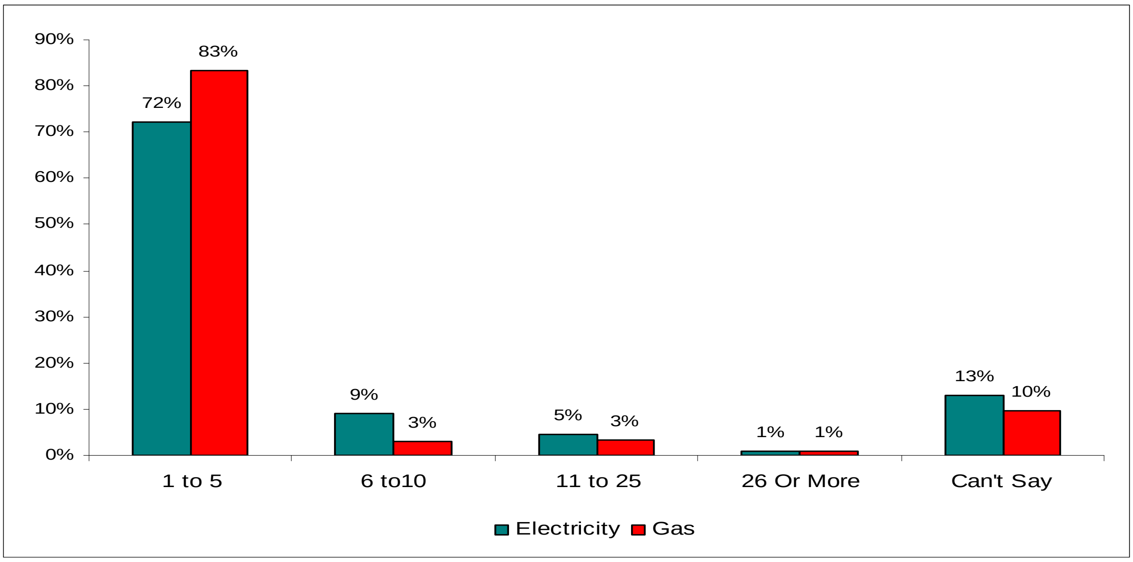


QE6/QG6. Have ANY energy companies approached your household by any means and offered to sell you energy?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

For those who had been approached, one to five sales approaches by energy companies was common in the past 12 months (Figure 5). Seventy two percent of electricity customers were approached this often overall (70% in metro NSW and 77% in non-metro NSW). Lower income respondents were more likely to be approached by electricity companies 6 to 10 times (13%) than higher income respondents (7%). For gas customers, 83% reported 1 to 5 approaches. This rose to 93% for lower income respondents.

Figure 5. Number of Sales Approaches, Past 12 Months

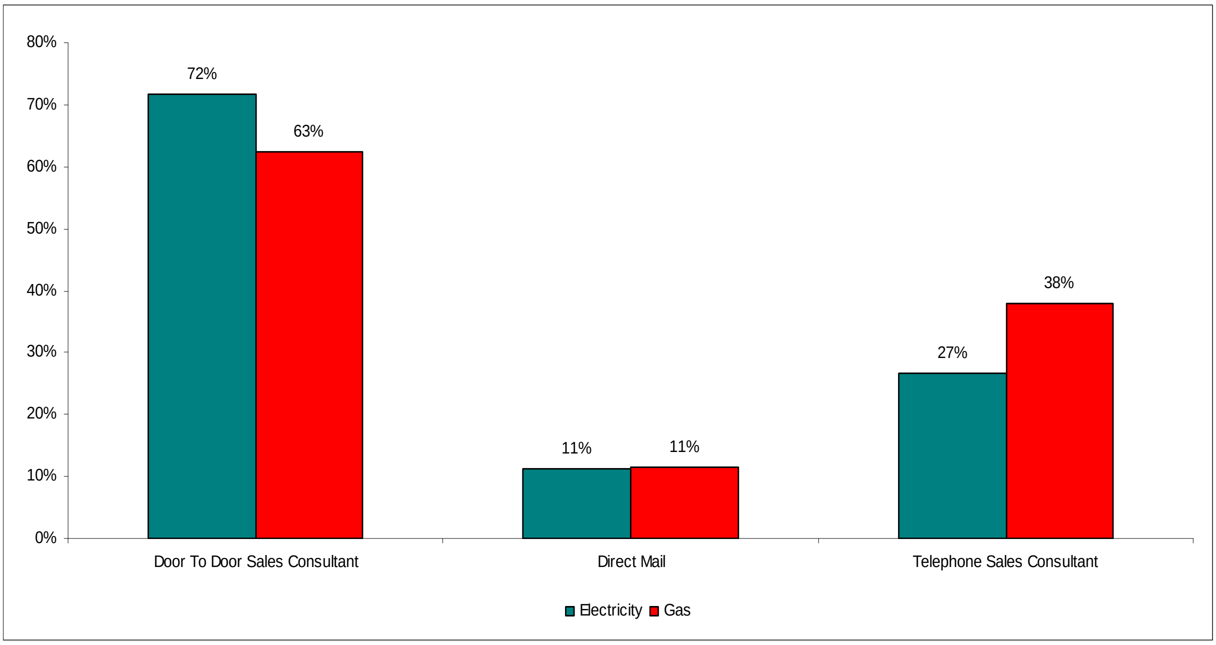


QE6a/QG6a. How many times have you or others in your household been approached and offered energy in the past 12 months?

Base: Total households approached by electricity companies (n=675); total households approached by gas companies (n=119)

Figure 6 shows that a door-to-door, in-person, sales contact was the most common type of sales call received by a customer. The rate was 74% in metro NSW and 65% in non-metro regions. Perhaps this difference is not surprising as greater housing density in metro areas may make in-person contacts more practical. A telephone contact was the next most popular method. There were no significant metro/non-metro differences for telephone contact rates.

Figure 6. Method of Sales Approaches Reported

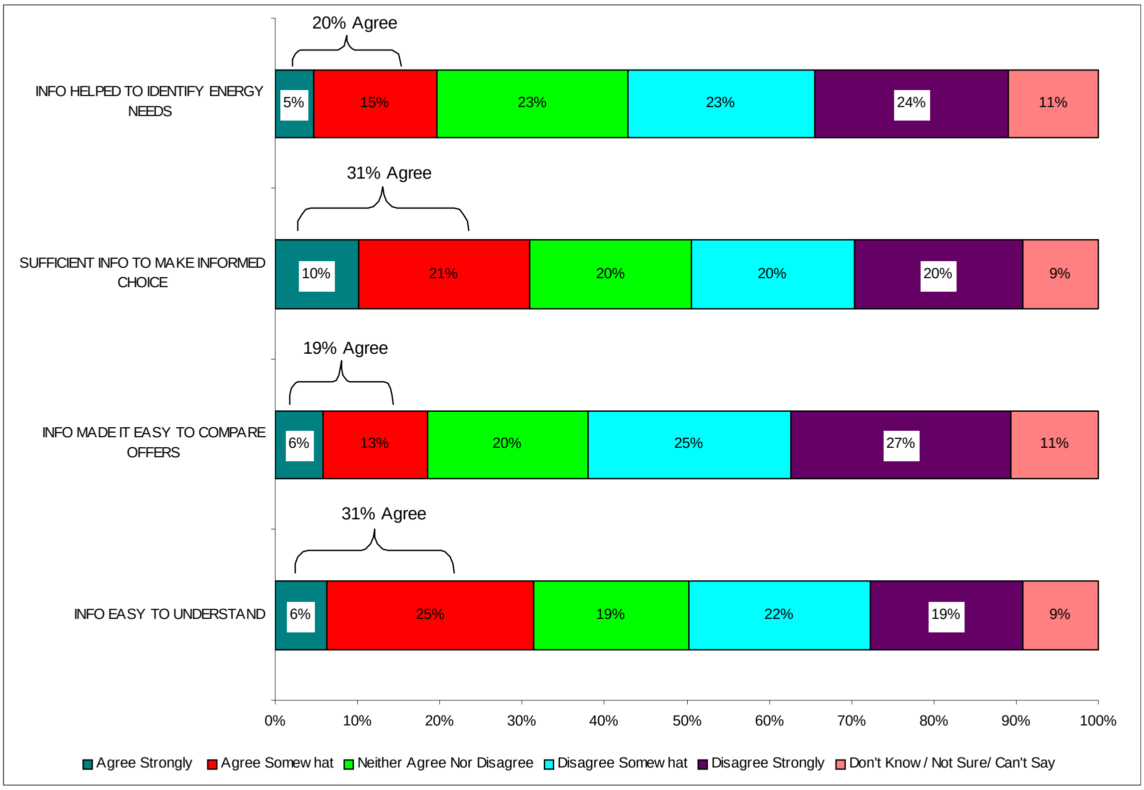


QE7/QG7. Thinking about the last energy company who contacted you, how did they approach you?

Base: Total households approached by electricity companies and offered electricity (n=675); total households approached by gas companies and offered gas (n=119)

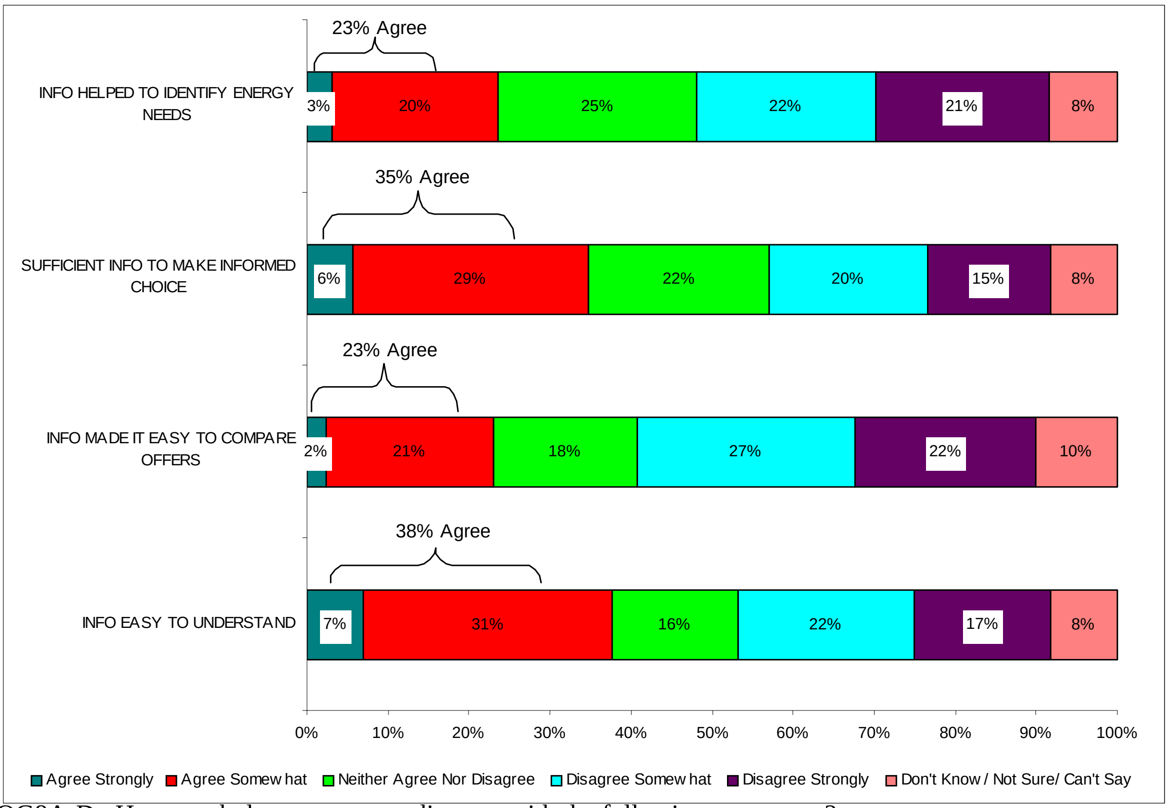
The information received during the sales encounters for electricity and gas was not rated favourably. Only about 20% - 30% agreed that the information was easy to understand or sufficient, for example (see Figure 7 for electricity, Figure 8 for gas). Positive ratings for gas information were slightly higher than for electricity but never exceeded 40%. One statistically significant difference that emerged from the gas data was that metro customers were more critical than non-metro customers. Overall, 35% of the gas customers approached for a sale said they disagreed either somewhat or strongly that the information was sufficient to make a choice. Split out by region, this showed to be 40% percent of the metro customers compared to only 13% in non-metro areas. As non-metro gas customers are receiving fewer sales calls, they may be more accepting of the adequacy of the information they do receive (or more resigned to making the best of what they receive).

Figure 7. Ratings of Sales Encounters: Electricity Information



QE8A-D. How much do you agree or disagree with the following statements?
Base: Total households approached by electricity companies and offered electricity (n=675)

Figure 8. Ratings of Sales Encounters: Gas Information



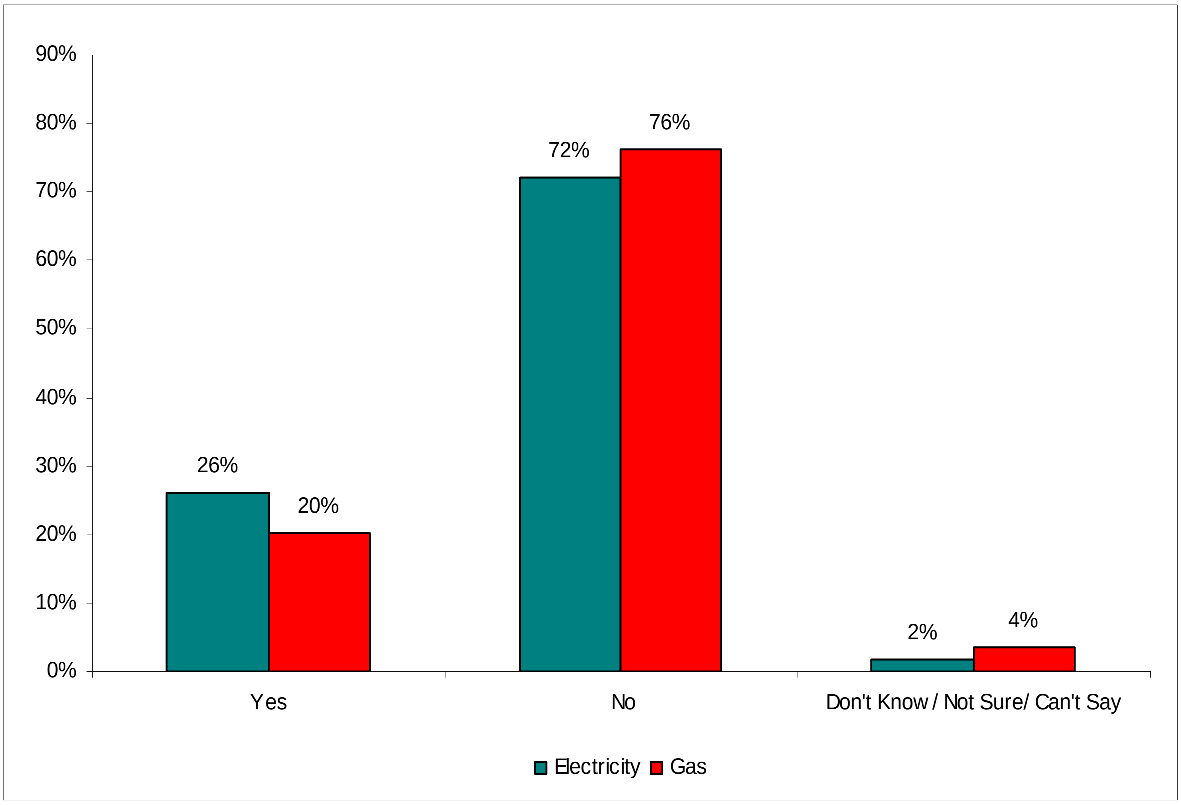
QG8A-D. How much do you agree or disagree with the following statements?

Base: Total households approached by gas companies and offered gas (n=119)

In addition to companies approaching customers, the reverse is, of course, also possible. Customers may enquire about information to assist with energy purchasing decisions. One in four electricity customers (26%) approached an electricity company to ask about buying electricity and the percentage was similar for gas customers who approached gas companies (20%), as shown in Figure 9. The rate of this activity was significantly higher for people with a higher electricity bill (29%).

The determination of retail competitiveness in NSW would be strengthened by finding a higher rate of customers who actively seek information. In fairness though, the awareness of the ability to approach companies is undoubtedly higher than the rate of actual approaches. The rate of this awareness would also be a fair measure of retail competitiveness but the question was not included in the present survey.

Figure 9. Customer Approaches to Energy Companies



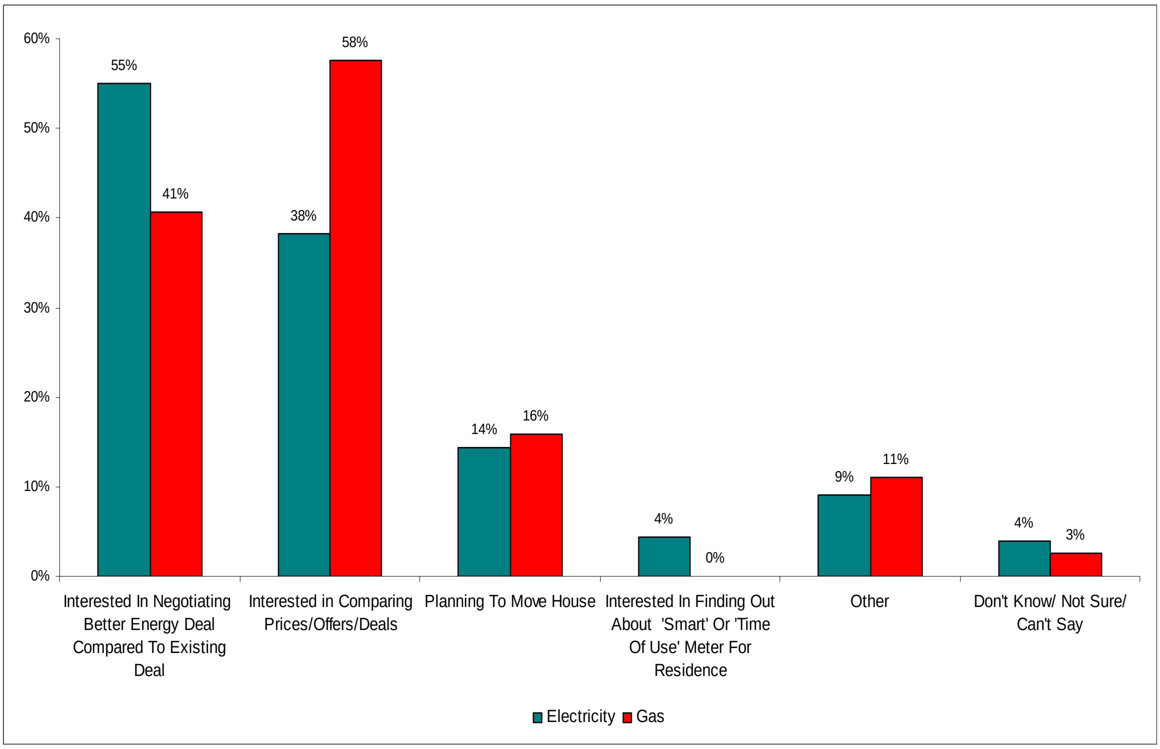
QE9/QG9.Have you approached an energy company, including your existing energy company, to ask about buying energy from them?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

Figure 10 illustrates that the reasons customers had for approaching the companies centered on money (e.g., better financial deals, and price comparisons). The approaches by the customer were most often described in terms akin to a negotiation for better prices or a better deal.

The focus on saving money is consistent with the finding just noted that a significantly higher percentage of people with more expensive electricity bills were making the approaches.

Figure 10. Reasons for Approaching Energy Company



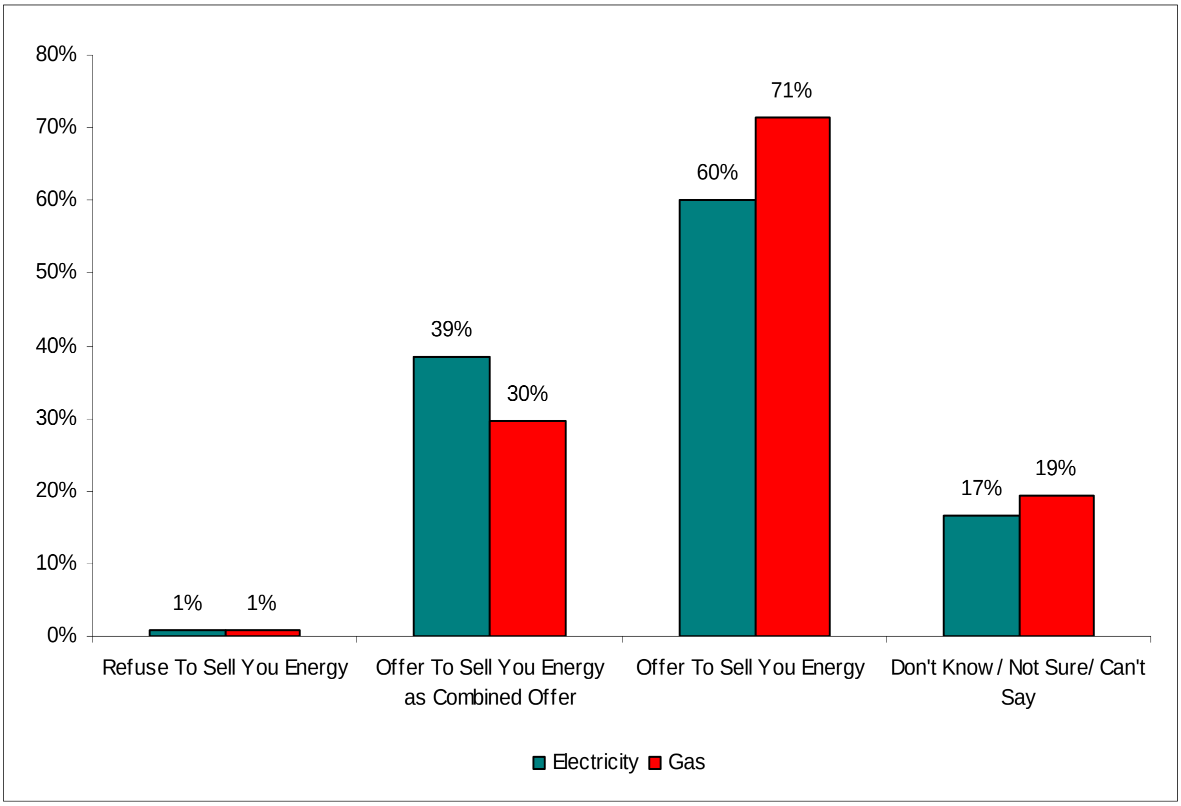
QE10/QG10. Why did you approach the energy company to ask about buying energy from them?

Base: Total approached electricity company including existing company to ask about buying electricity from them (n=252); approached gas company including existing company to ask about buying gas from them (n=73)

The telephone was the most common means used by customers who actively contacted energy companies. Seventy nine percent of electricity and gas users used this method. The second most common method of contacting companies was the internet (24% for electricity users and 25% for gas users).

As Figure 11 shows, the refusal to sell a customer electricity or gas was very unusual (1%) whether the company approaches the customer or vice versa. Most people did not offer a reason why the refusal had occurred. It was very common for the sales encounter to result in an offer to sell a single energy service. Electricity companies offered a combination of electricity and gas to 39% of respondents and gas companies made such an offer to 30%. The combined offer made by electricity companies was more prevalent in metro areas (44%) compared to non-metro (26%).

Figure 11. Outcome of Sales Encounter (Initiated by Company or Customer)

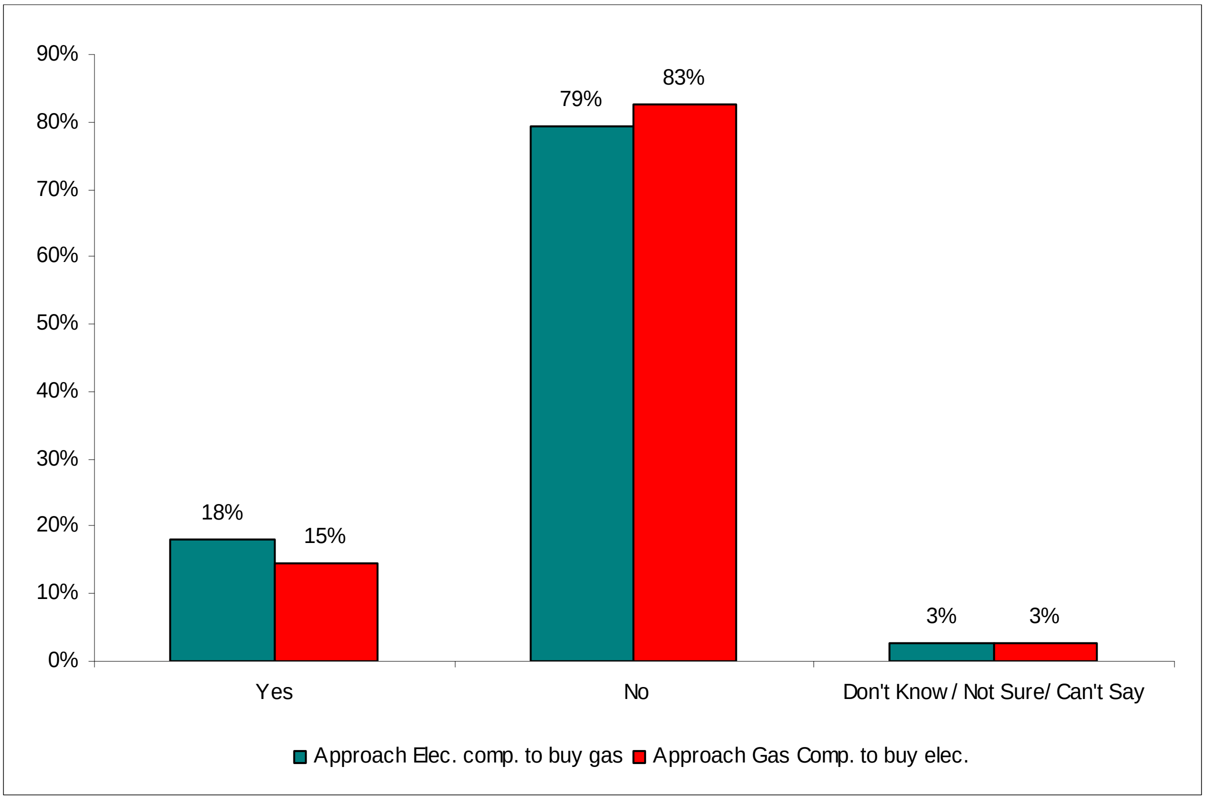


QE12/QG12. Did any of the energy companies that you approached, or that approached you...

Base: Total households approached by or approaching electricity companies and offered to sell electricity (n= 737); total households approached by or approaching gas companies and offered to sell gas (n= 159)

Because some companies offer both electricity and gas services, gas customers were asked whether they approached any electricity company to buy gas and whether they approached any gas company to buy electricity. About 15% had done these activities (Figure 12).

Figure 12. Approaches by Gas Customer



QE13/QG13. Have you approached any electricity (gas) company, including your existing electricity (gas) company, to ask about buying gas (electricity) from them?

Base: Total use piped natural gas in households or able to connect to piped natural gas (n=476); total use piped natural gas in households (n=386)

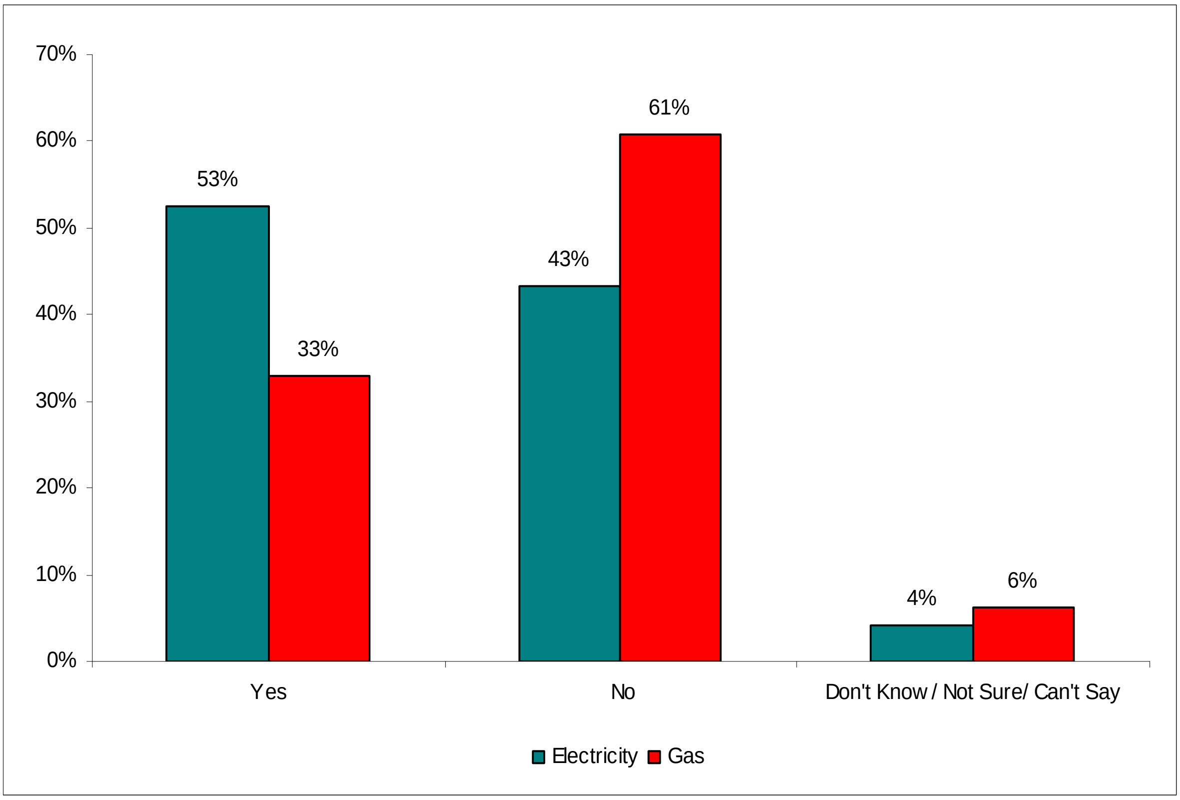
4.3 Switching behaviour

One of the key measures of retail competitiveness is the activity of customers switching between companies. A lack of switching does not conclusively mean that competition is not present. People may not switch due to loyalty, convenience, inertia, among other reasons. Nevertheless, the rate of switching provides a "window" on how free the market is and allows us to see if there are any barriers to switching that, in the customers view, impede competition.

4.3.1 Switching of Suppliers

Switching electricity companies was a somewhat more common practice than switching gas companies (Figure 13). A majority of electricity customers switched since 2002 but only one in three gas customers had. The rate of switching gas companies rose to 37% for those receiving a lower gas bill.

Figure 13. Switching Energy Companies

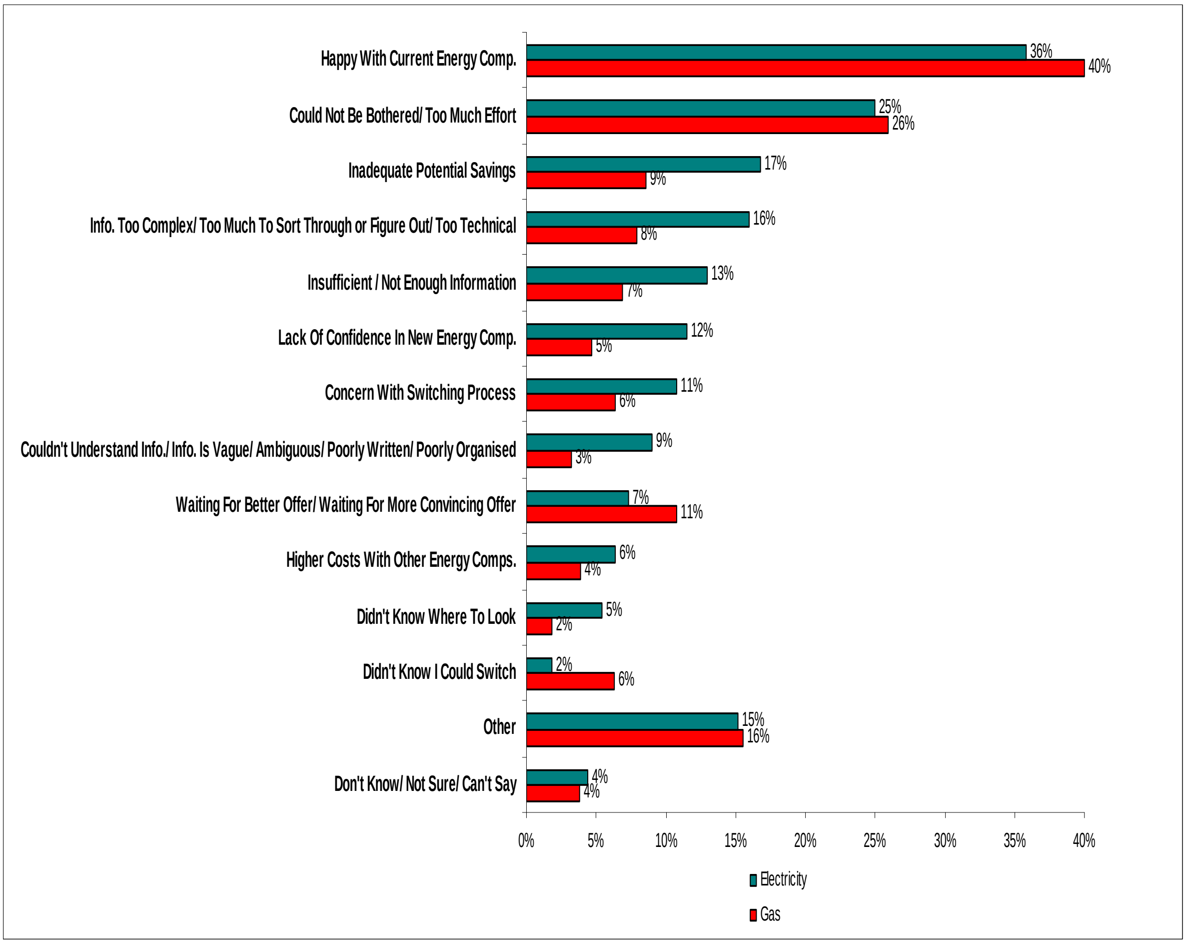


QE14/QG14. Have you switched energy companies in New South Wales since January 2002?

Base: Total use electricity in household (n=999); total use piped natural gas in households (n=386)

For those who had not switched, reasons had most to do with satisfaction with the current company as well as inertia (Figure 14). Energy companies were not described as having barriers in place to prevent switching. Mentions of "information complexity" can be viewed as unplanned or informal barriers because a confused customer may be one who is more likely to remain with the current retailer. For electricity, this reason was mentioned by 16%. The rate rose to 20% for the higher income group and 19% for metro respondents. "Happy with current company" was mentioned by a higher percentage of low income respondents, 46% for electricity and by 52% for gas. "Could not be bothered" was mentioned by higher percentages of higher income respondents, 32% for electricity and 31% for gas. These significant differences may point to different strategies for convincing customers to switch retailers depending on their demographic characteristics.

Figure 14. Reasons Why Residents Did Not Switch Energy Retailers

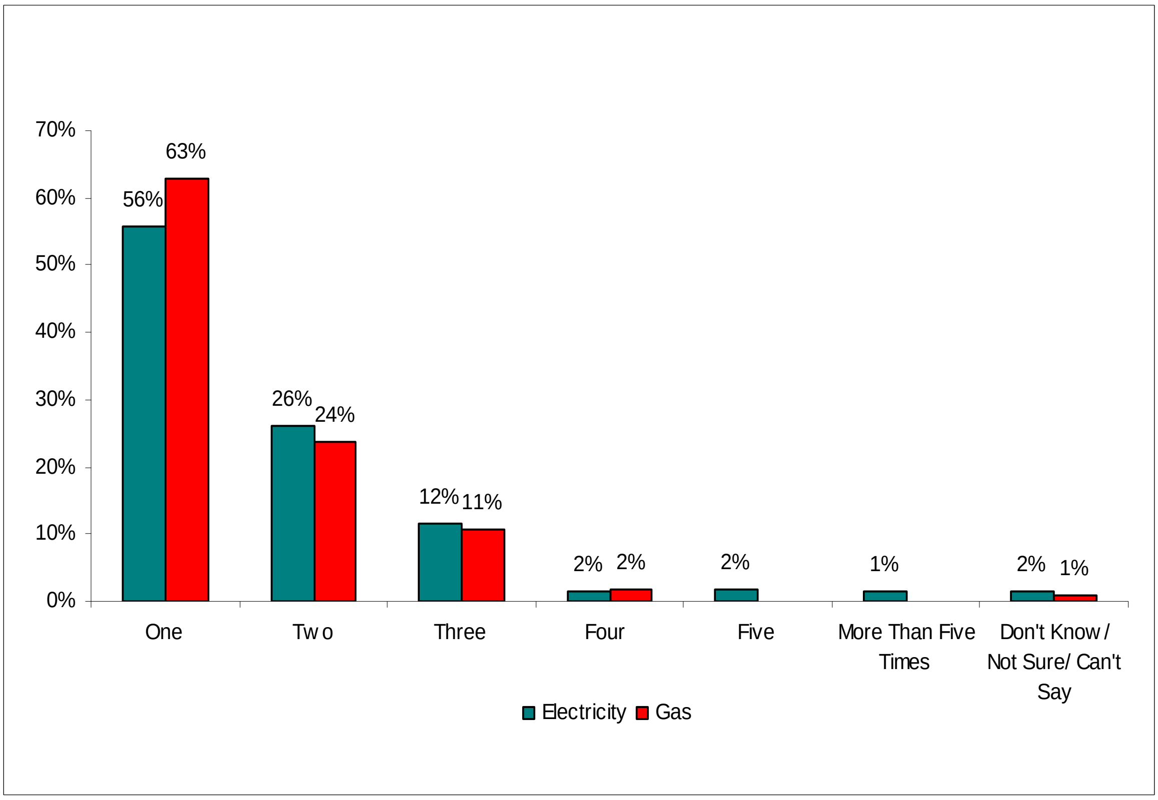


QE25/QG25. Why haven't you changed energy company?

Base: Total not switched NSW electricity companies since January 2002 (n=440); total not switched NSW gas companies since January 2002 (n=236)

Most people who had switched did so only once in the last 10 years. About one in four had switched twice in that time (Figure 15). The frequency of switching was affected by regional differences. For electricity, 52% in metro areas reported switching once compared to 63% in non-metro. For those switching electricity companies twice, 30% in metro did this vs. 19% in non-metro. This higher churn rate may occur because those metro customers are being approached more often or are more likely to be approached by electricity retailers.

Figure 15. Number of Times Switched Energy Companies Since 2002

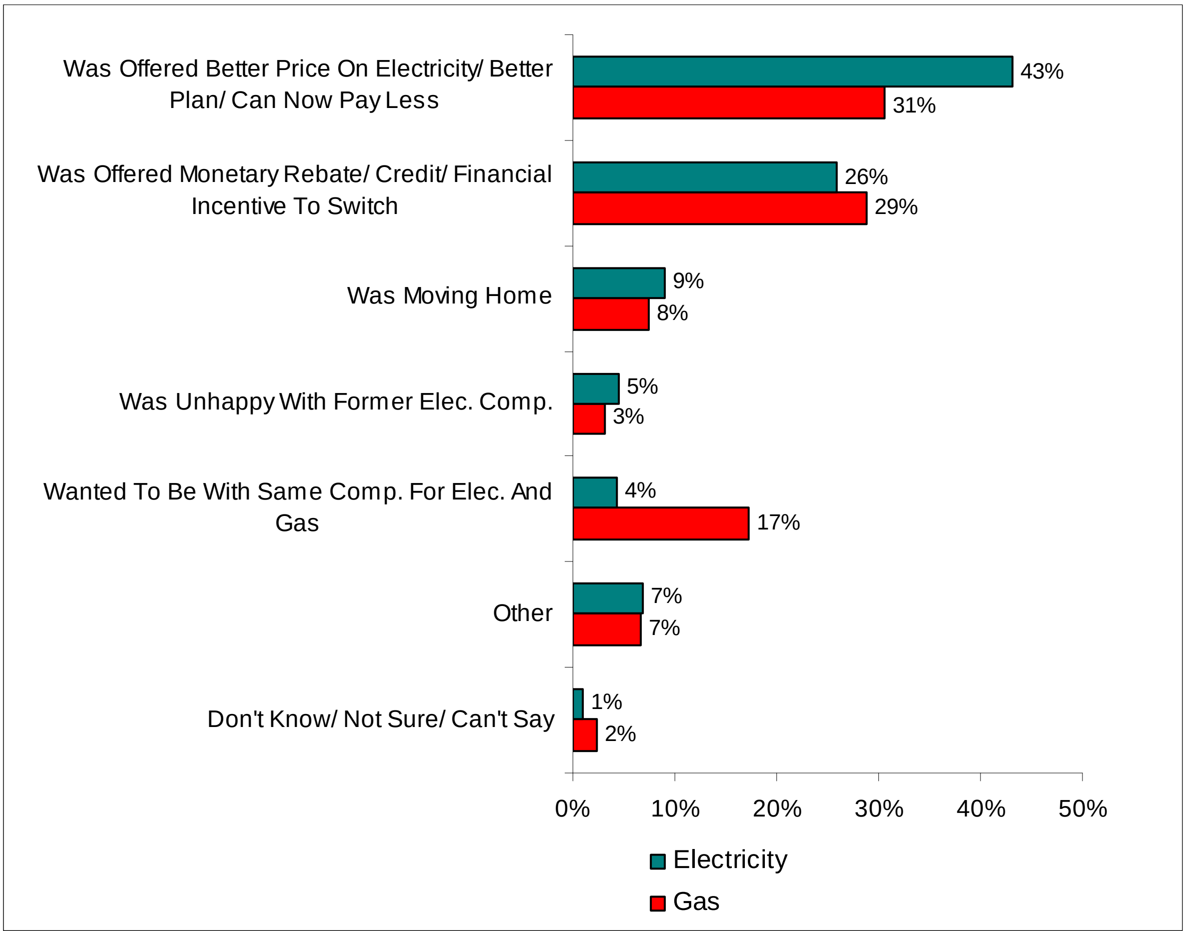


QE14a/QG14a. How many times have you switched energy companies in New South Wales since January 2002?

Base: Total switched electricity companies (n=520); total switched gas companies (n=128)

Reasons people gave for switching retailers centred on money: better prices, rebates, or incentives (Figure 16). Bundling was more commonly mentioned by gas users than electricity users (17% vs. 4%).

Figure 16. Reasons for Switching Energy Companies

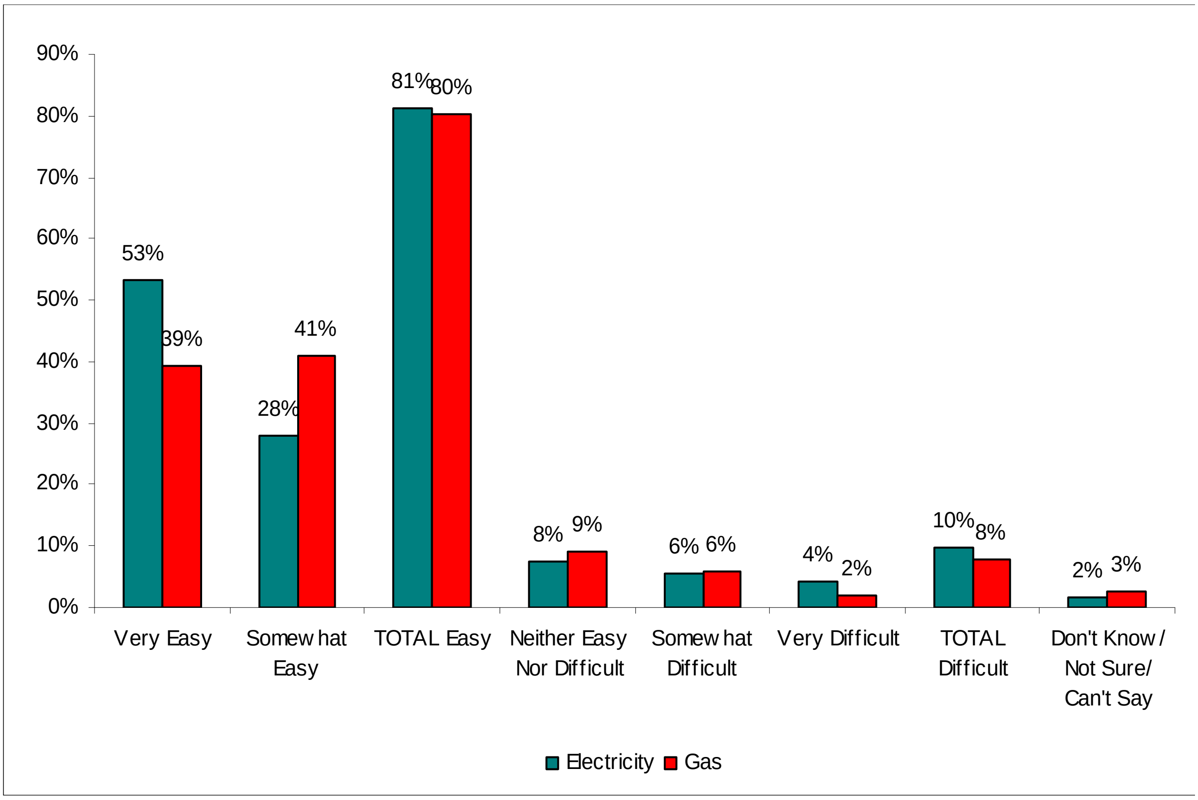


QE20/QG20. The last time you switched your energy company, what was the one most important reason for your decision?

Base: Total switched electricity companies (n=520); total switched gas companies (n=128)

For those who switched, ease of switching for electricity and gas were equivalent (81% vs. 80%, see Figure 17). The process took about as long as expected (Figure 18). Approximately 20% thought the process took more time than expected.

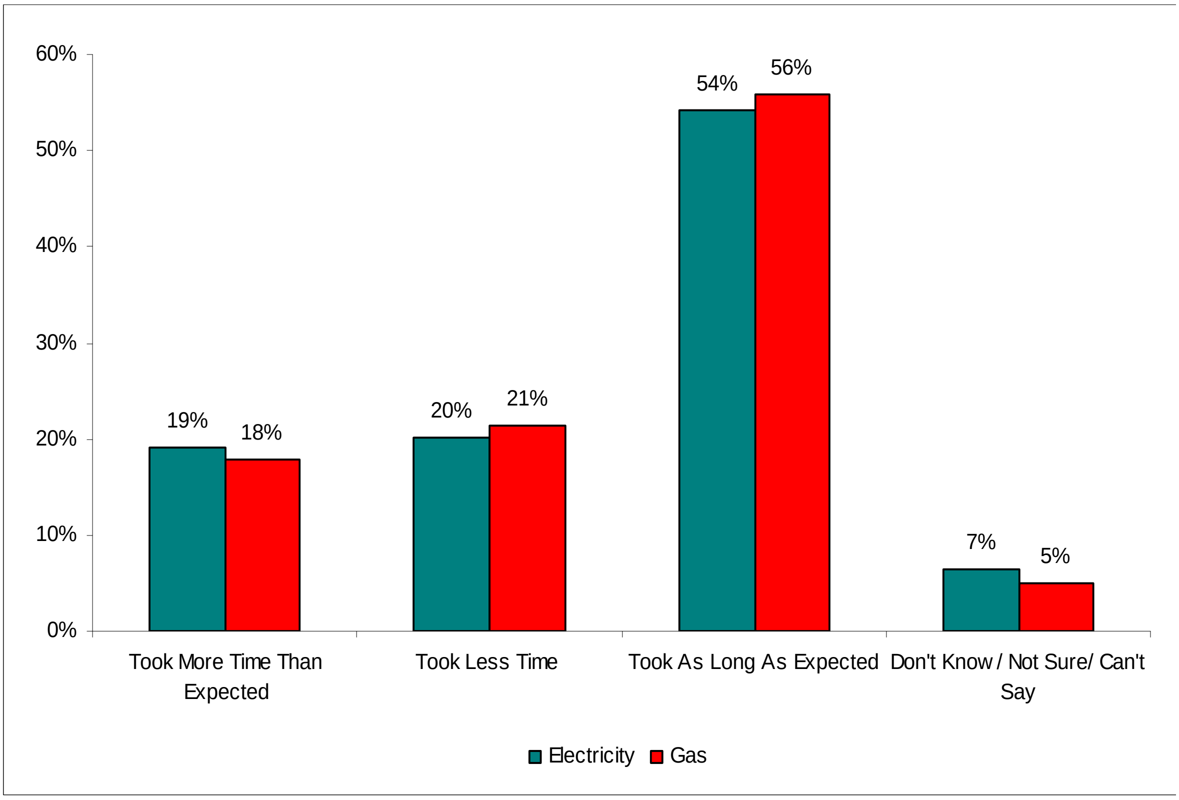
Figure 17. Ease of Switching



QE15/QG15. The last time you switched your energy company, how easy was the switching process?

Base: Total switched electricity companies (n=520); total switched gas companies (n=128)

Figure 18. Time Taken to Switch vs. Expectation

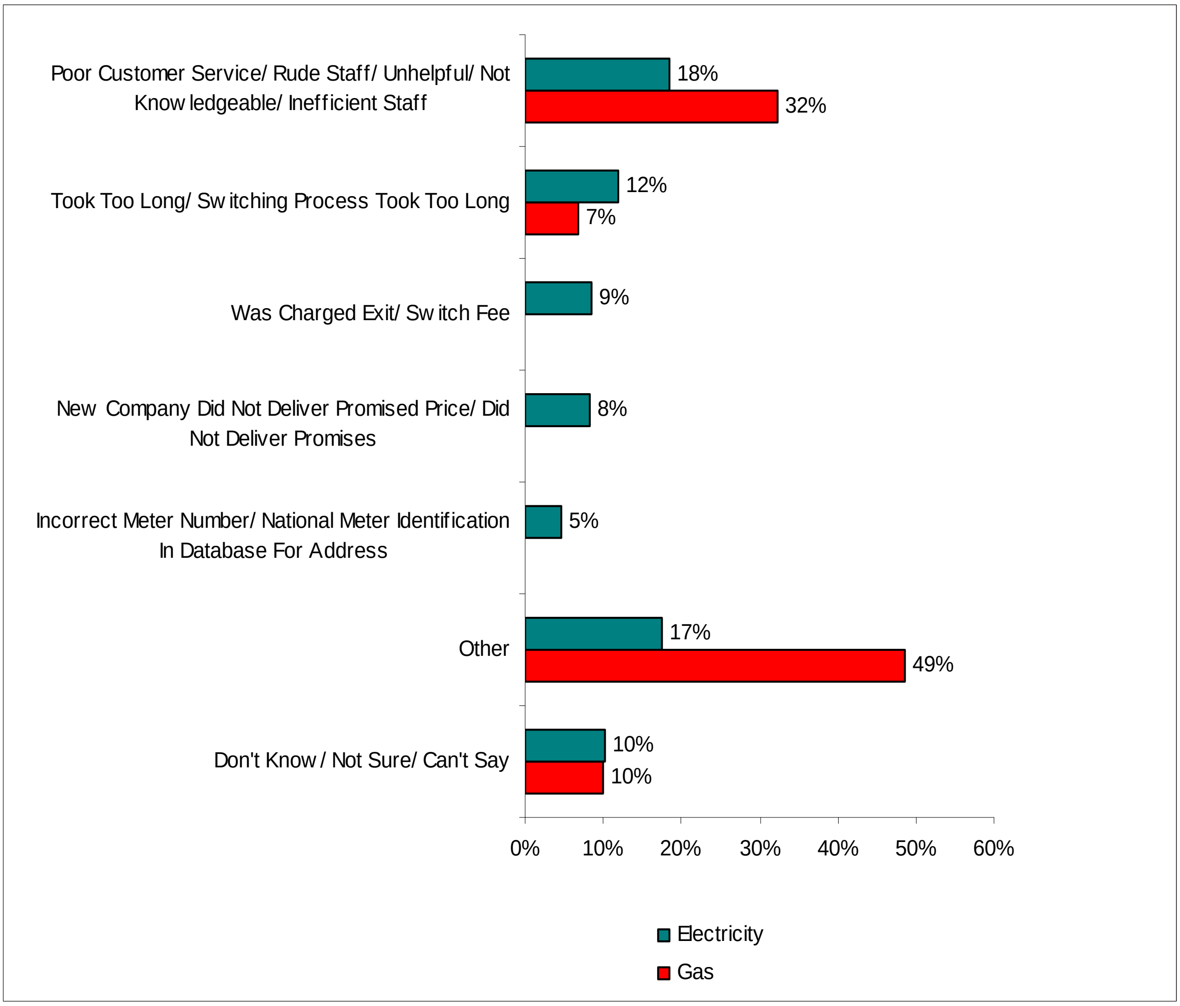


QE16/QG16. Would you say the switching process...?

Base: Total switched electricity companies (n=520); total switched gas companies (n=128)

The switching process was seen as proceeding smoothly by a strong majority of gas and electricity customers. More than 80% said the process went smoothly (82% for electricity and 85% for gas). For those who said the process did not go smoothly, Figure 19 shows that poor customer service was cited more than any other comment category.

Figure 19. Why Switching Process Was Not Smooth



QE19/QG19. Why did the switching process not go smoothly?

Base: Total did not have a smooth elec. switching process (n=73); total did not have a smooth gas switching process (**n=15, CAUTION: Small Base**)

The level of satisfaction with the new energy company is shown in Table 2. A majority were satisfied overall (i.e., "very" or "somewhat" satisfied) with the switch. For electricity 57% were satisfied and for gas, 65%. Regional differences were observed. People were more strongly satisfied with new gas companies in metro areas (27% "very satisfied" in metro vs. only 7% in non-metro areas). Put another way, those in non-metro areas were more likely to be more weakly (that is "somewhat") satisfied.

Table 2. Degree of Satisfaction with New Energy Company

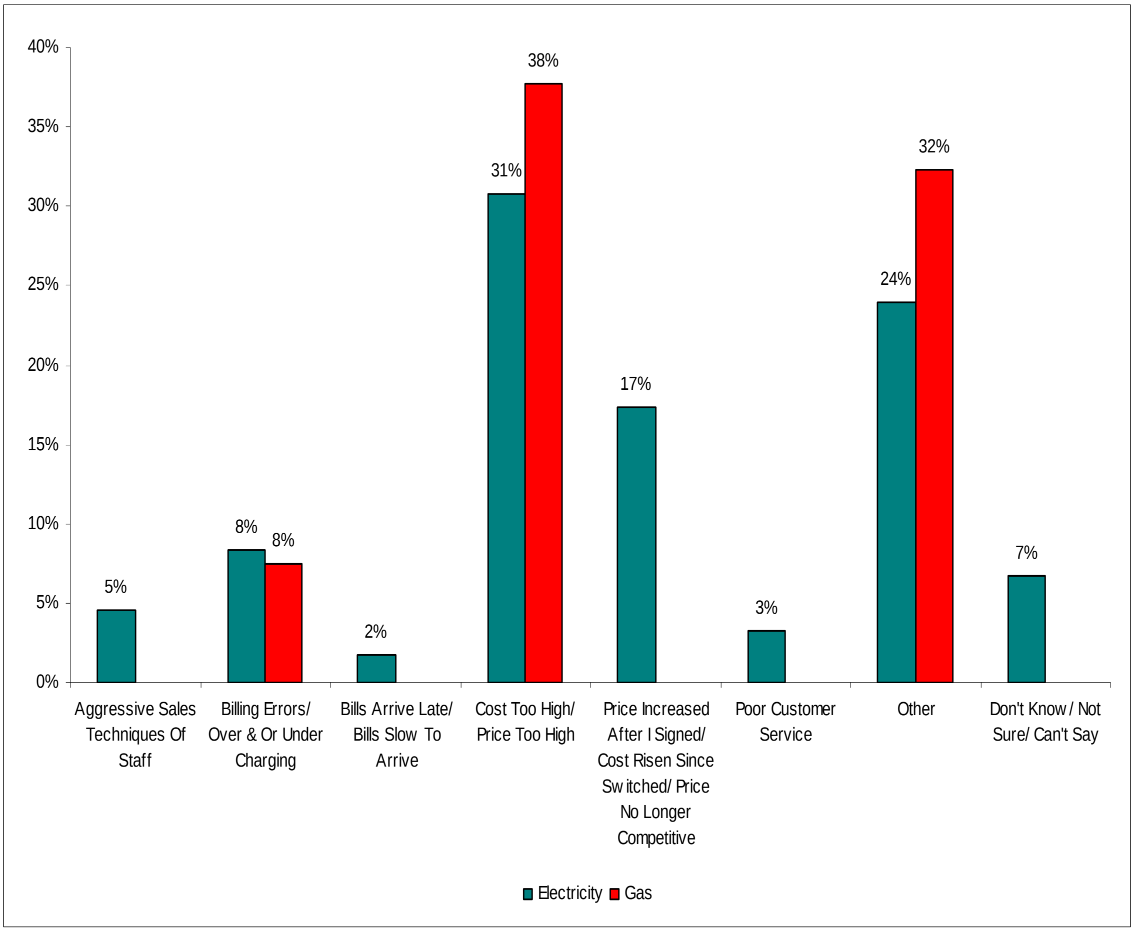
	Electricity	**Gas**
Very Satisfied	23%	23%
Somewhat Satisfied	34%	42%
TOTAL Satisfied	57%	65%
Neither Satisfied Nor Dissatisfied	27%	29%
Somewhat Dissatisfied	9%	2%
Very Dissatisfied	4%	2%
TOTAL Dissatisfied	13%	5%
Don't Know/ Not Sure/ Can't Say	3%	2%

QE22/QG22. Overall, how satisfied or dissatisfied are you with your new energy company?

Base: Total switched electricity companies (n=520); total switched gas companies (n=128)

Reasons for dissatisfaction and satisfaction were collected. People who were dissatisfied with the switch for electricity (13%) and gas (4%) mentioned high costs (Figure 20). People satisfied with the switch mentioned lower cost and better customer service ("easier to deal with") from the new company, Figure 21. The category "easier to deal with" showed a regional difference with 23% in metro areas mentioning this comments compared to 10% non-metro.

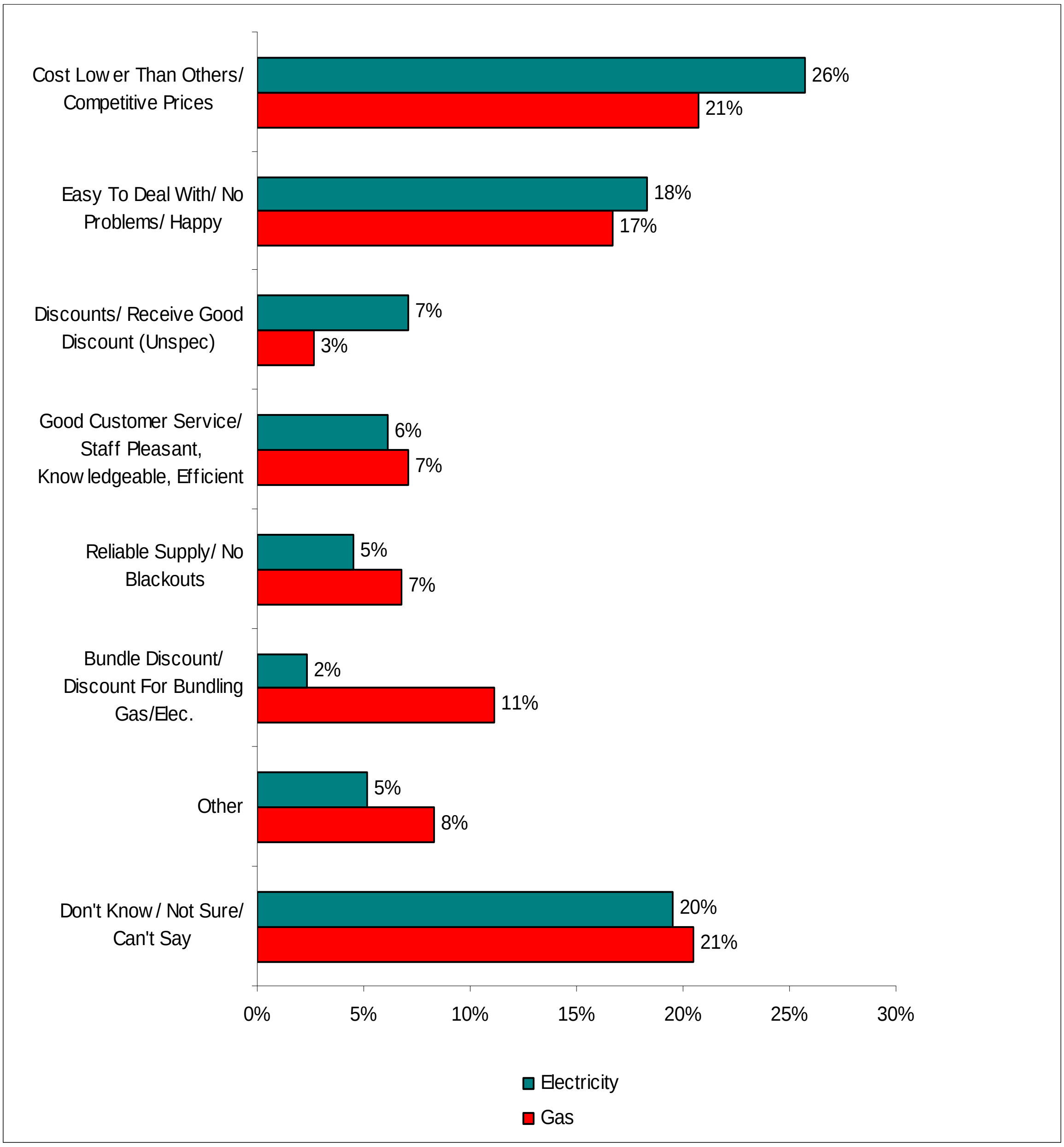
Figure 20. Reasons for Dissatisfaction with New Energy Company



QE23/QG23. Why are you dissatisfied with your new energy company?

Base: Total somewhat dissatisfied or very dissatisfied with new electricity company (n=61); total somewhat dissatisfied or very dissatisfied with new gas company (**n=9, CAUTION: Small base**)

Figure 21. Reasons for Satisfaction with New Energy Company



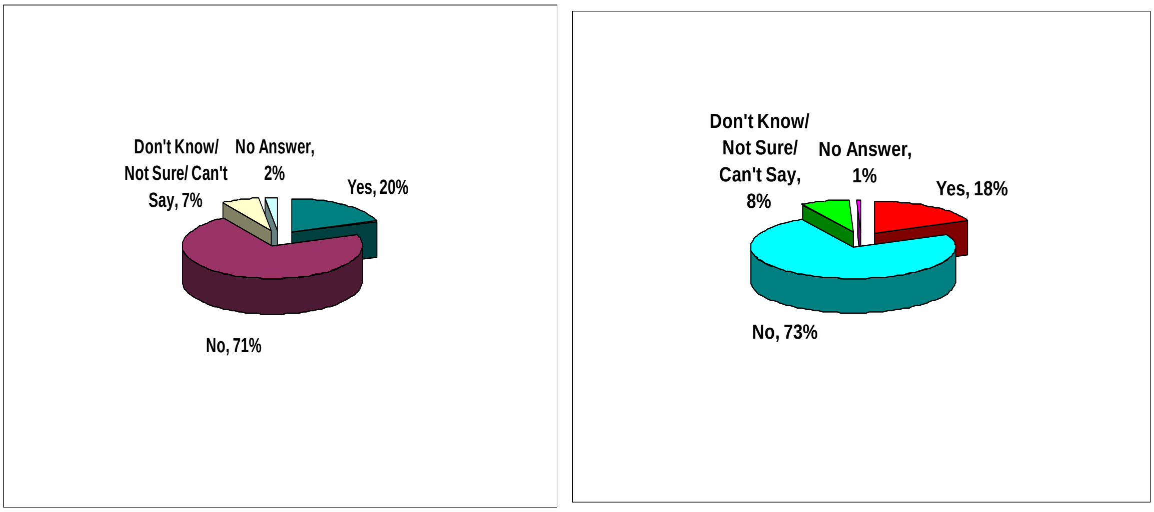
QE24/QG24. Why are you satisfied with your new energy company?

Base: Total very satisfied or somewhat satisfied with new electricity company (n=297); total very satisfied or somewhat satisfied with new gas company (n=79)

4.3.2 Changing Company Arrangements

People who did not switch energy suppliers were asked if they changed the way their current company sells the service. Figure 22 shows that about 1 in 5 had done so. For electricity the "yes' rate rose to 23% for the higher income group. For gas, the "no" rate dropped to 69% for higher incomes. Higher income appears to be associated with a higher rate of changing arrangements.

Figure 22. Incidence of Changing Energy Arrangements (Left panel: electricity, Right panel: gas)

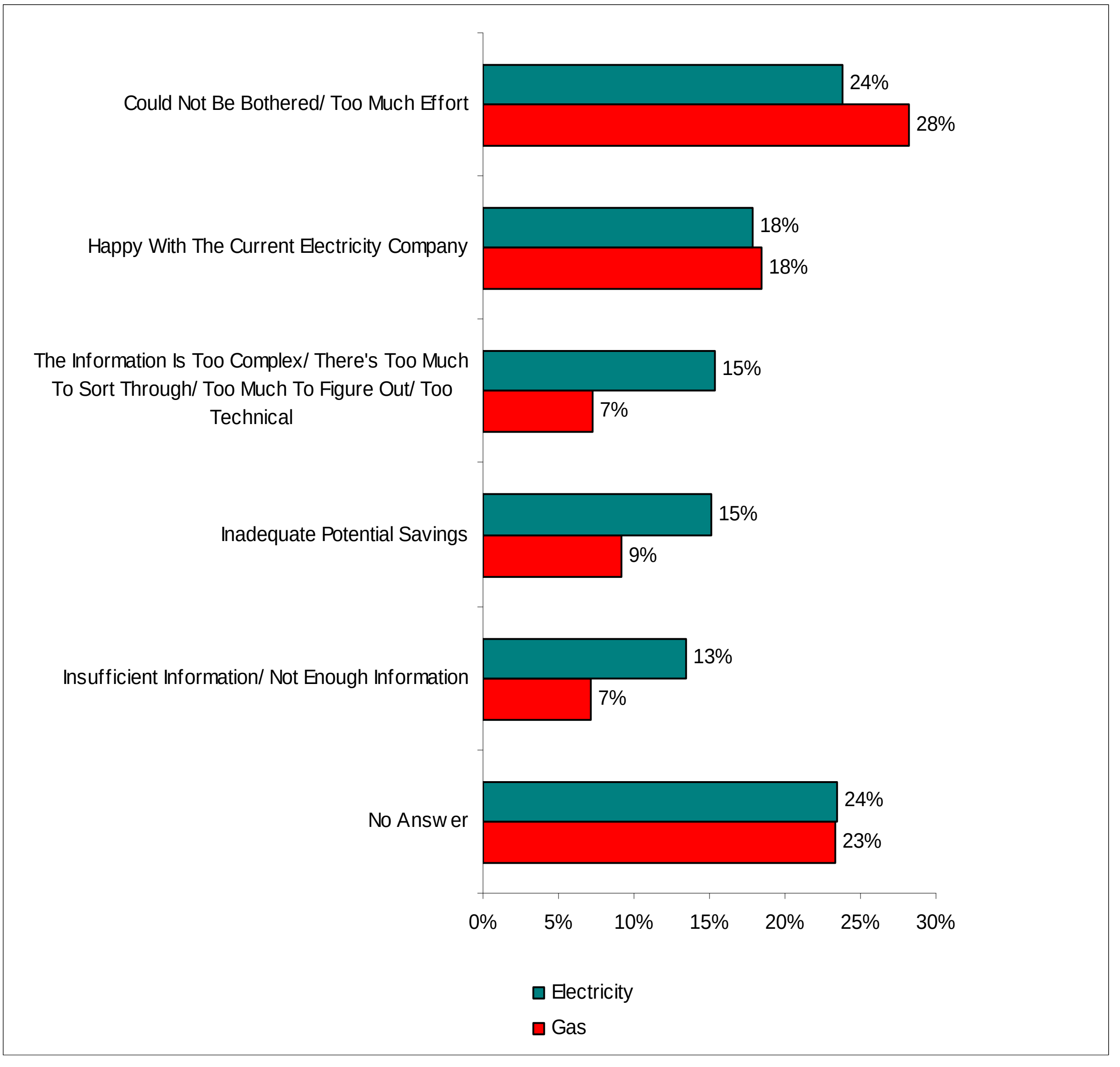


QE26/QG26. Have you changed anything about the way your energy company sells energy to you?

Base: Total not switched NSW electricity companies since January 2002 or don't know (n=479); total not switched NSW gas companies since January 2002 or don't know (n=258)

Those who had not made changes of this sort cited inertia or satisfaction with the current company as the reason not to change (Figure 23). Inertia was cited more commonly by those with higher electricity bills (30%) or higher income (34%). The reason was also cited more for gas users if they had higher incomes (33%). "Inadequate potential savings" was cited more by metro respondents (18%) than non-metro (8%).

Figure 23. Reasons Why Arrangements with Company Not Changed

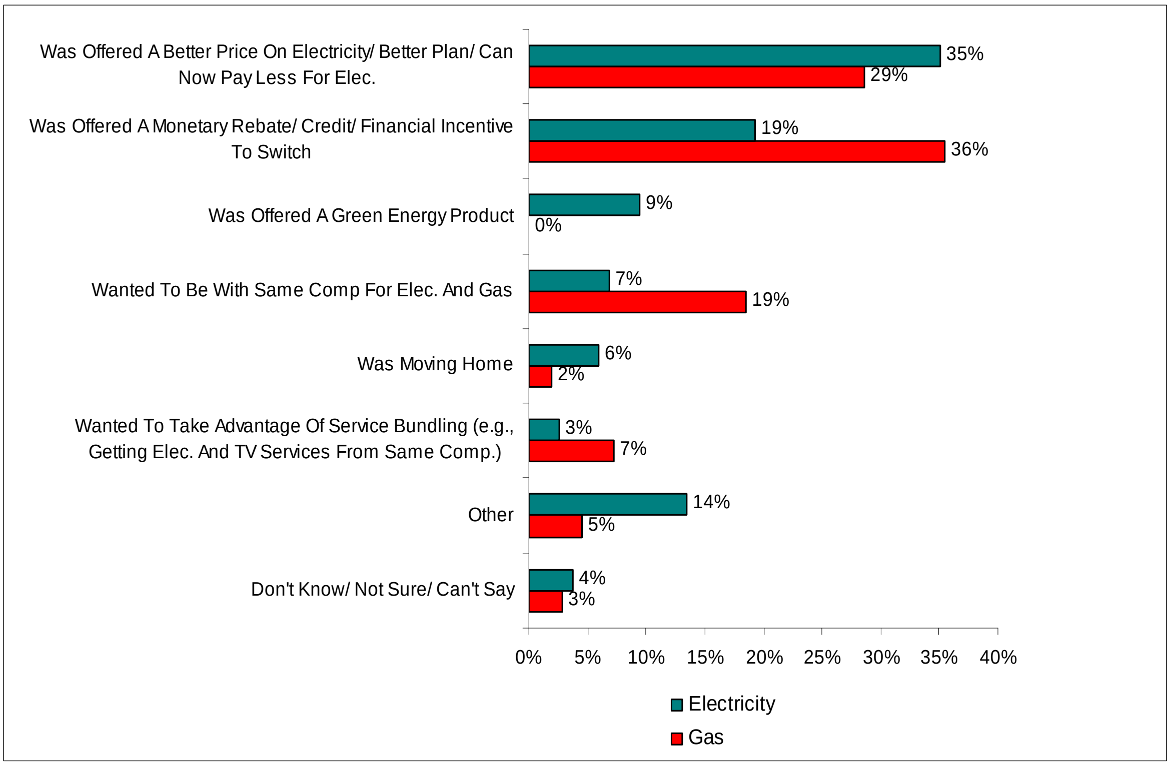


QE34/QG34. Why haven't you made any changes to the way you buy energy?

Base: Total not changed any arrangements (n=343); total not changed any arrangements (n=194)

People who did change arrangements cited financial reasons, e.g., better plan, better price, as the one main reason (Figure 24). Bundling was mentioned by 19% of the gas customers compared to 7% of the electricity customers. It may be that the financial incentive for bundling among gas users is greater than for electricity as 36% of gas users overall mentioned a rebate/incentive as the reason to change arrangements.

Figure 24. One Main Reason for Changing Energy Arrangements

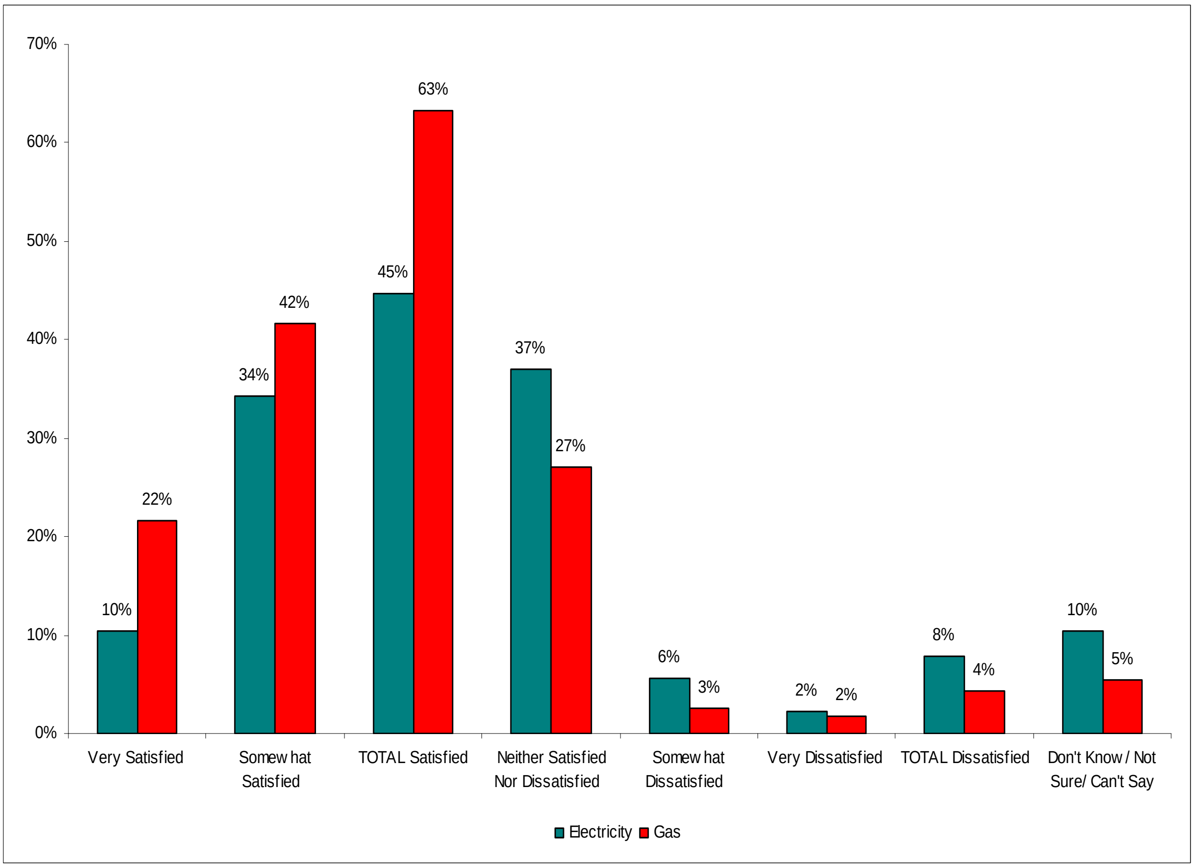


QE27/QG27. Thinking about the last time you changed your energy supply arrangements with your energy company, what was the one main reason for your decision?

Base: Total changed any arrangements (n=94); total changed any arrangements (n=45)

The level of satisfaction experienced with the new arrangements was higher for gas than electricity (Figure 25). For gas, overall satisfaction ("very" or "somewhat" satisfied) was 63% compared to 45% for electricity.

Figure 25. Satisfaction with the New Energy Arrangements

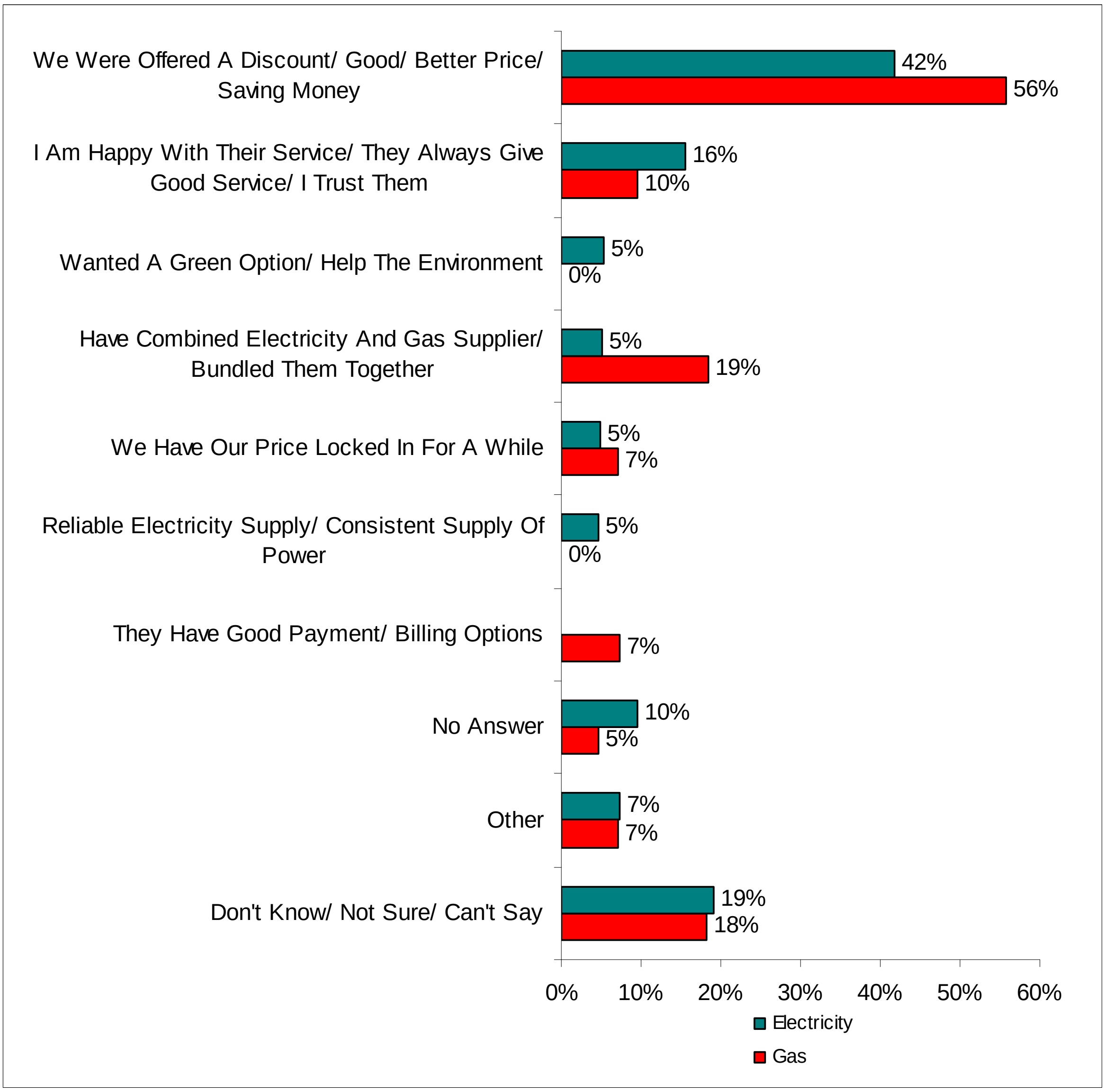


QE29/QG29. How satisfied or dissatisfied are you with your new energy supply arrangements?

Base: Total changed any elec. arrangements (n=94); total changed any gas arrangements (n=45)

Reasons for the dissatisfaction with the new arrangements were based on very few respondents (7 for electricity, 2 for gas users). Six of the seven (86%) electricity customers were dissatisfied because they felt prices were too high, too expensive, or the companies keep putting the prices up. Reasons for satisfaction were dominated by price and discount comments (Figure 26).

Figure 26. Reasons for Satisfaction with New Arrangements

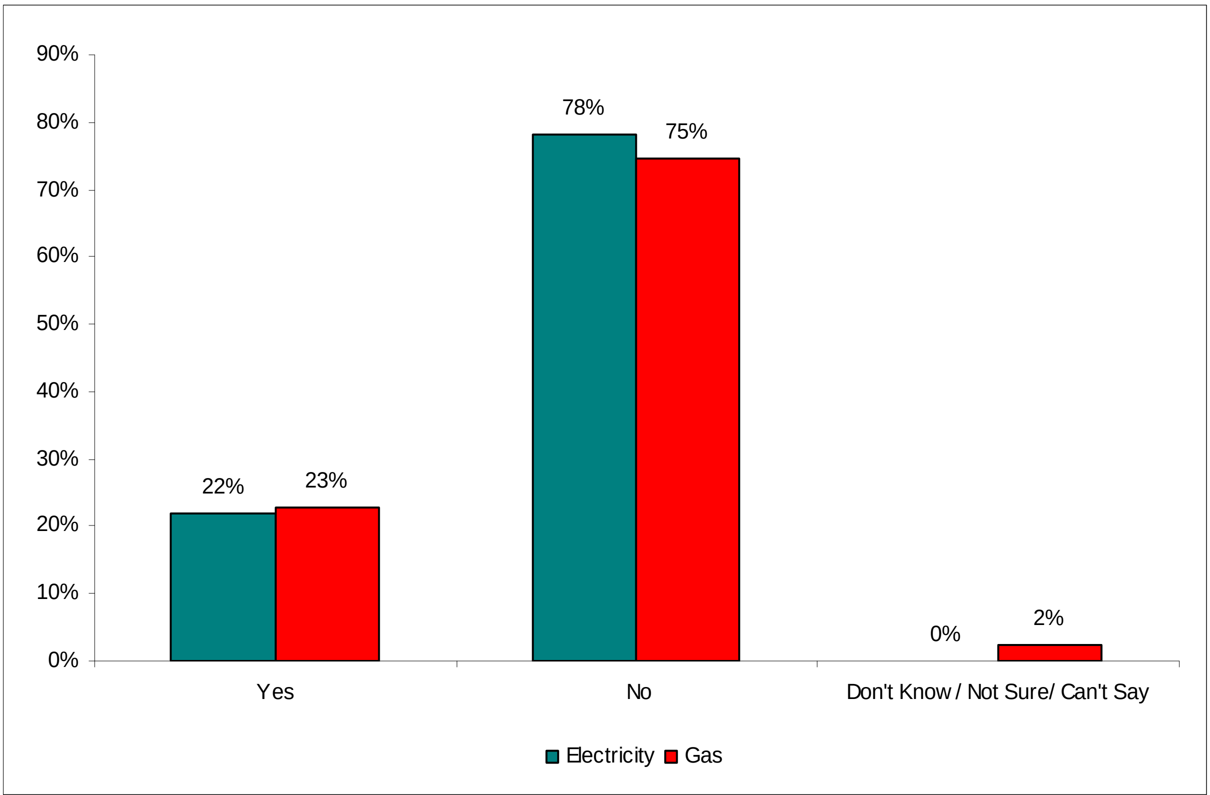


QE31/QG31. Why were you satisfied?

Base: Total very satisfied or somewhat satisfied with new electricity supply arrangments (n=45); total very satisfied or somewhat satisfied with new gas supply arrangments (n=29)

Most people who changed arrangements did not check the competitive pricing of their company vs. others (Figure 27) in the time since they last changed. In this survey, the methods of checking were not specified. Prompting respondents with a list of options or ways to check pricing may have yielded a higher rate of engagement. Nevertheless, this may be an area for attention for efforts to make customers better informed of their options.

Figure 27. Checking of Competitive Pricing/Tariffs

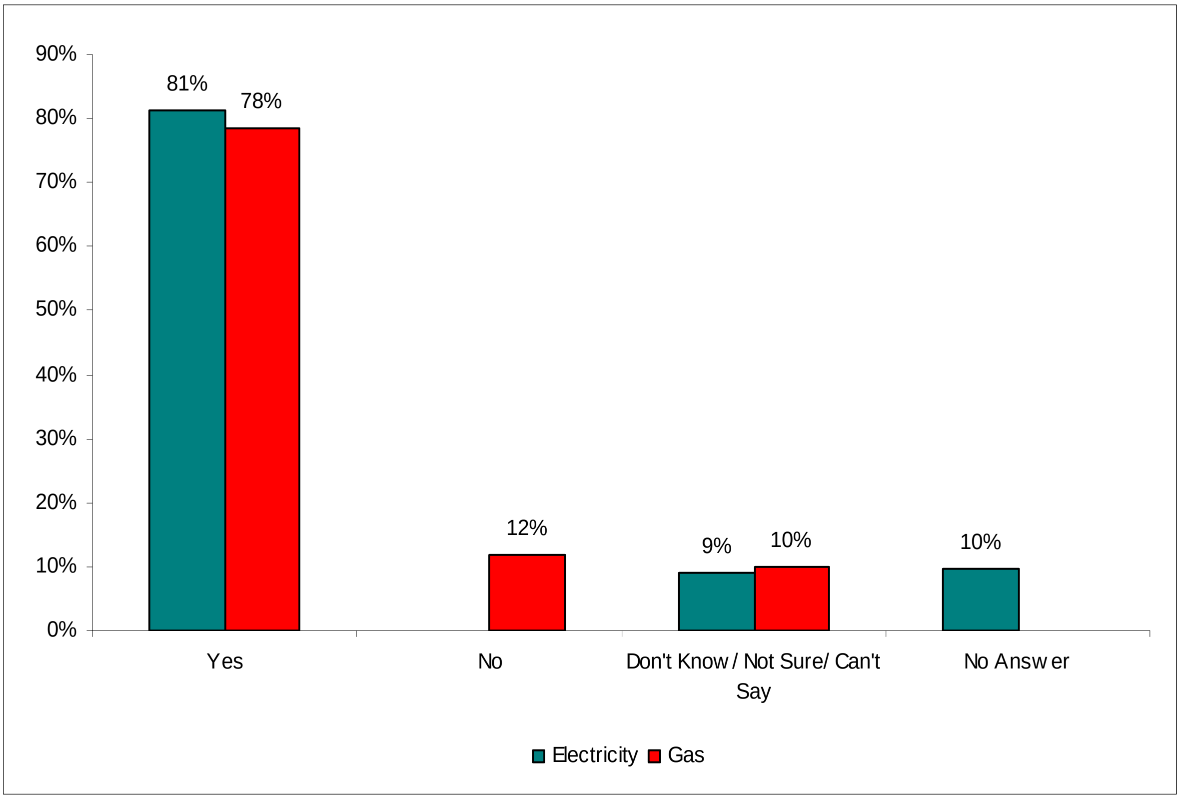


QE32/QG32. In the time since you last changed your energy supply arrangements with your retailer, have you checked whether your current energy price (or tariff) is competitive relative to other energy offers?

Base: Total changed any arrangements (n=94); total changed any arrangements (n=45)

About 80% of those who had checked the current pricing thought the price was competitive (Figure 28).

Figure 28. Competitiveness of Pricing

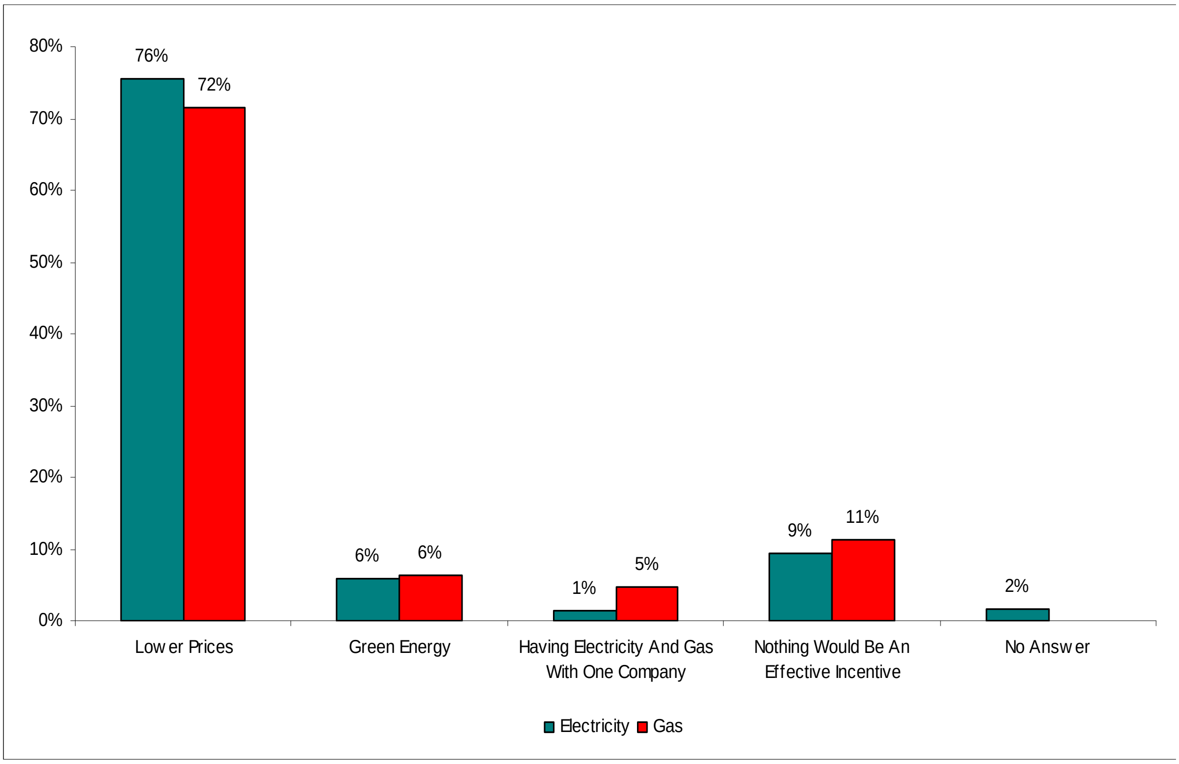


QE33/QG33. Was your current energy price (or tariff) competitive relative to other energy offers?

Base: Total checked current energy price or tariff is competitive (n=21); total checked current energy price or tariff is competitive (n=10)

People who had not switched companies or changed arrangements were asked what would encourage them to takes these steps. Not surprisingly, the leading factor mentioned had to do with getting a better price. This was mentioned by more than 70% for electricity and gas users (Figure 29).

Figure 29. Incentives that Encourage Switching or Changing Arrangements



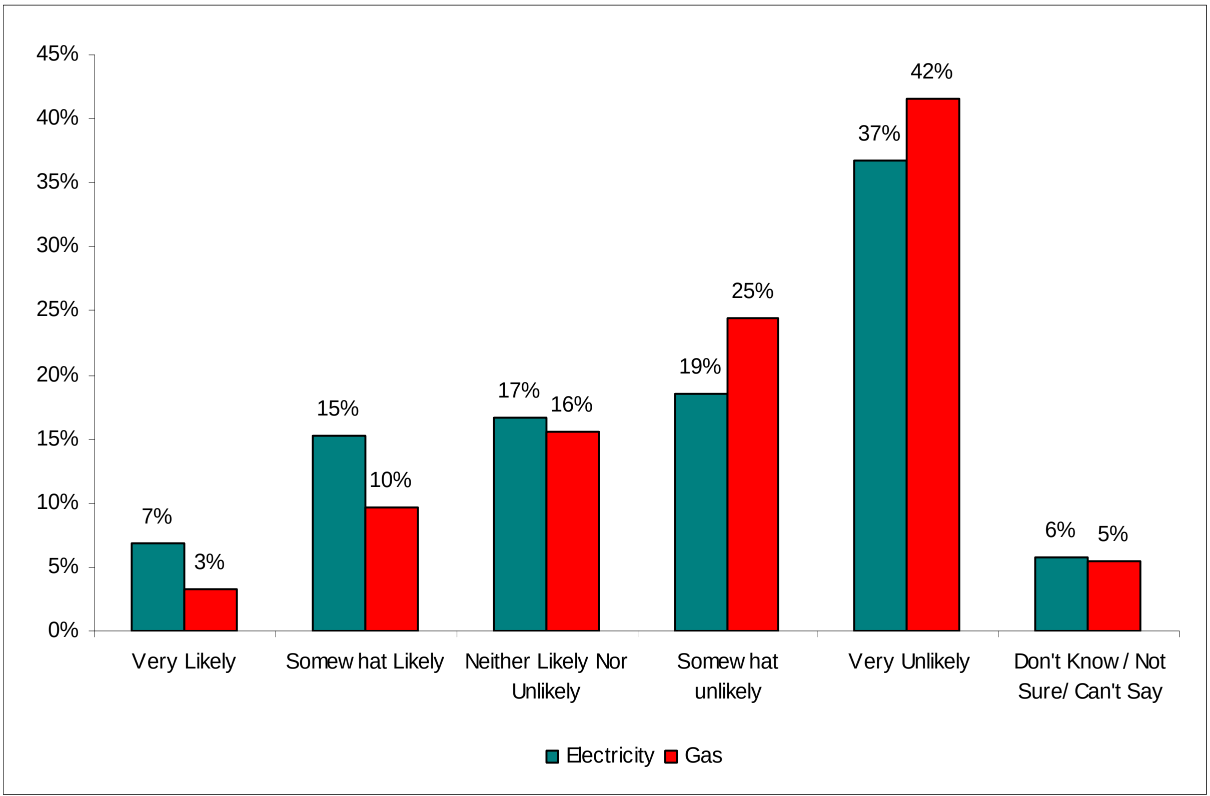
QE35/QG35. Which of following would be the one most effective incentive to encourage you to change energy companies or change the way you buy energy?

Base: Total not changed any elec. arrangements (n=343); total not changed any gas arrangements (n=194)

4.4 Plans/expectations and Information Searches

All participants were asked if they planned to switch energy arrangements with their present company in the next 12 months. As Figure 30 shows, a majority said it was unlikely. People with lower incomes were even less likely to say they were planning this compared to total ("very unlikely" 53% for lower income vs. 42% for total). Most people had not looked into it either (Figure 31) but more electricity users had done so than gas users (30% vs. 18%). People with higher electricity bills were more likely to say "yes, they had looked into it" (34%).

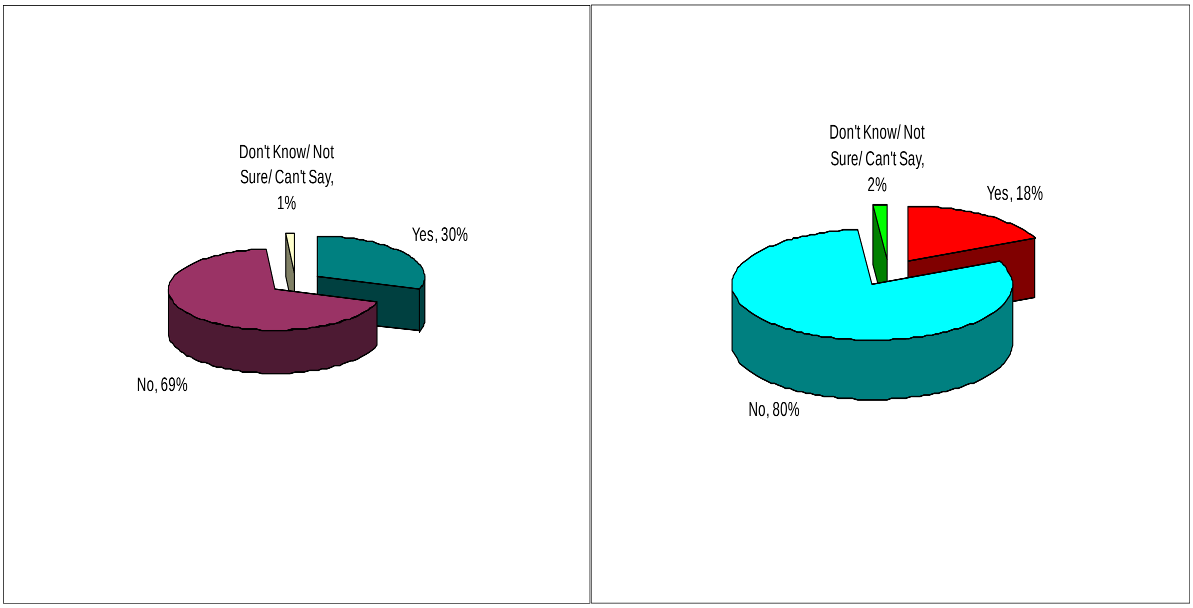
Figure 30. Plans to Switch Energy Arrangements, Next 12 Months



QE37/QG37. In the next 12 months, how likely or unlikely is it that you will change your energy supply arrangements with your current energy company?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

Figure 31. Looking for Information Related to Switching of Energy Arrangements (Left panel: electricity, Right panel: gas)

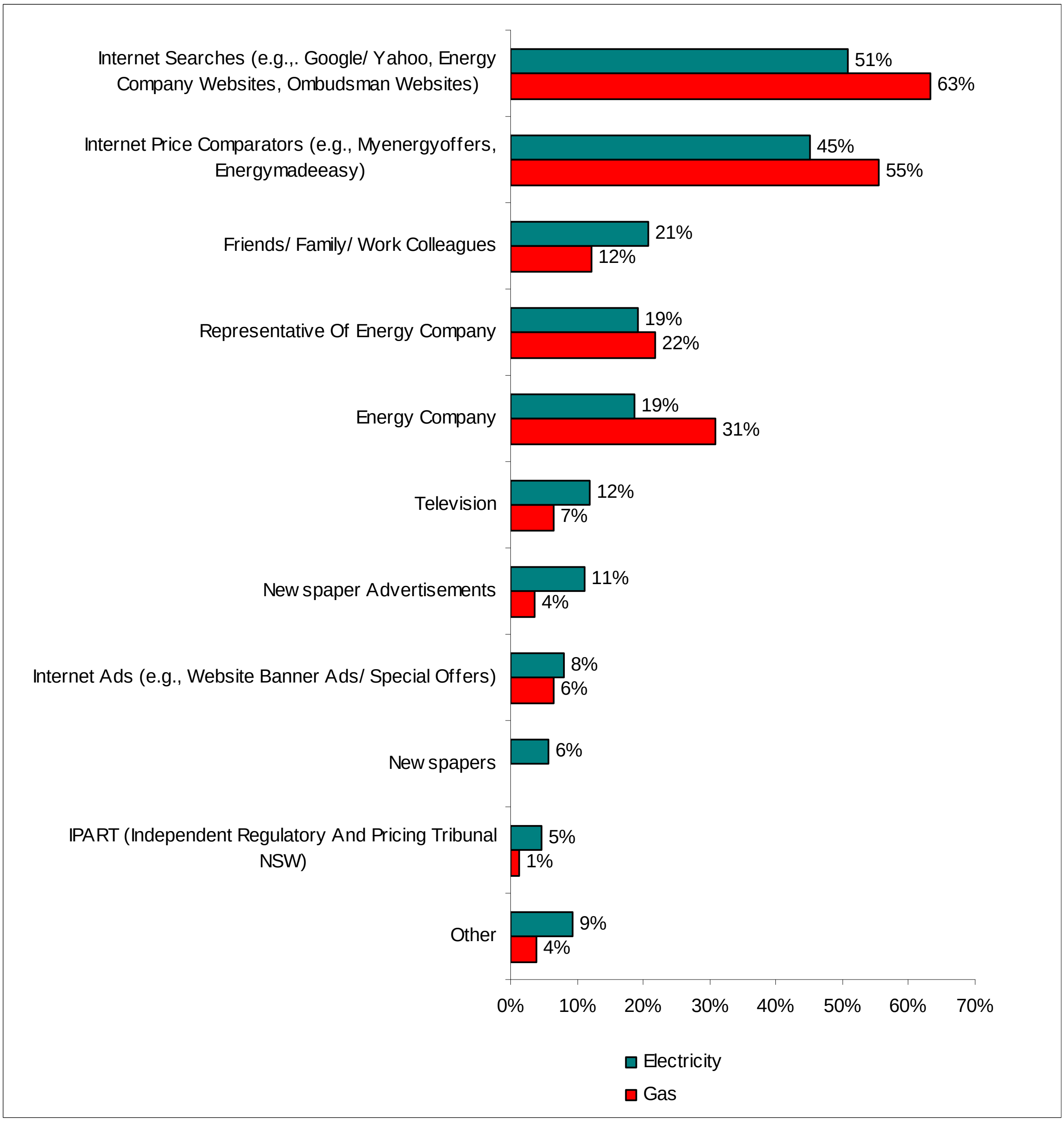


QE38/QG38. Have you looked for any information in the last 12 months to assist you in making a decision about changing your energy supply arrangements with an energy supplier, whether you have taken out a contract or not?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

Those who had looked for information on changing arrangements relied heavily on internet based information (Figure 32). Aside from the internet searches, a noticeable difference in the data can be observed in the rate at which customers went to an energy company (31% of gas customers vs. 19% for electricity). This may be because gas customers were going to their electricity company to get a gas deal.

Figure 32. Information Sources used when Looking into Changing Arrangements

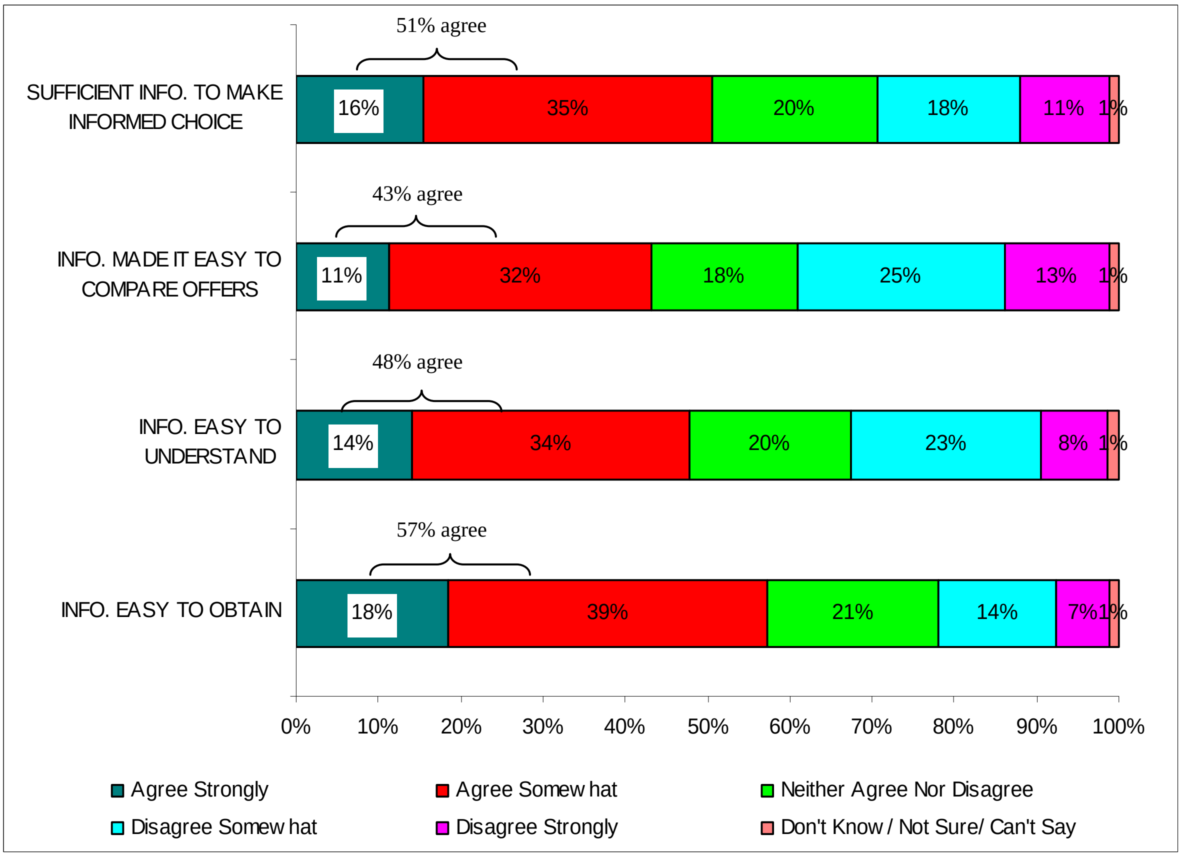


QE39. What were the sources of the information?

Base: Total looked for elec. info in last 12 months (n=293); total looked for gas info in last 12 months (n=64)

For electricity, ratings about the information obtained when looking into changing arrangement were not particularly strong (Figure 33). Only "information was easy to obtain" exceeded 50% agreement. This parallels ratings of information seen earlier in the context of sales occasions. Metro respondents were somewhat more critical. Nine percent of the metro respondents "disagreed strongly" that information was easy to obtain compared to 1% in non-metro. Similarly, 43% in metro areas disagreed somewhat or strongly that information made it easy to compare offers vs. 28% in non-metro.

Figure 33. Information Obtained About Changing Arrangement with Electricity Company

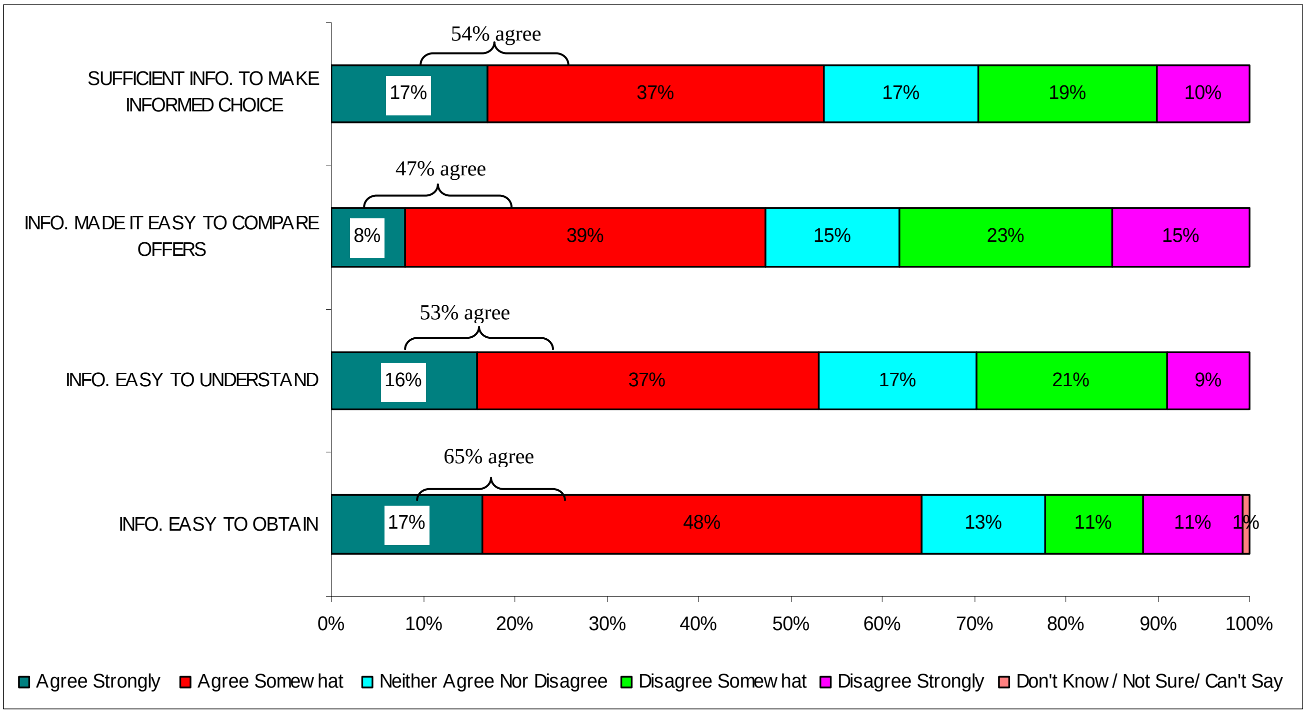


QE40A-D. To what extent do you agree with the following statements?

Base: Total looked for information in the last 12 months to assist in decision (n=293)

For gas, three of the four attributes exceeded 50% agreement (Figure 34) indicated the information was more satisfactory.

Figure 34. Information Obtained Regarding Changing Arrangement with Gas Company



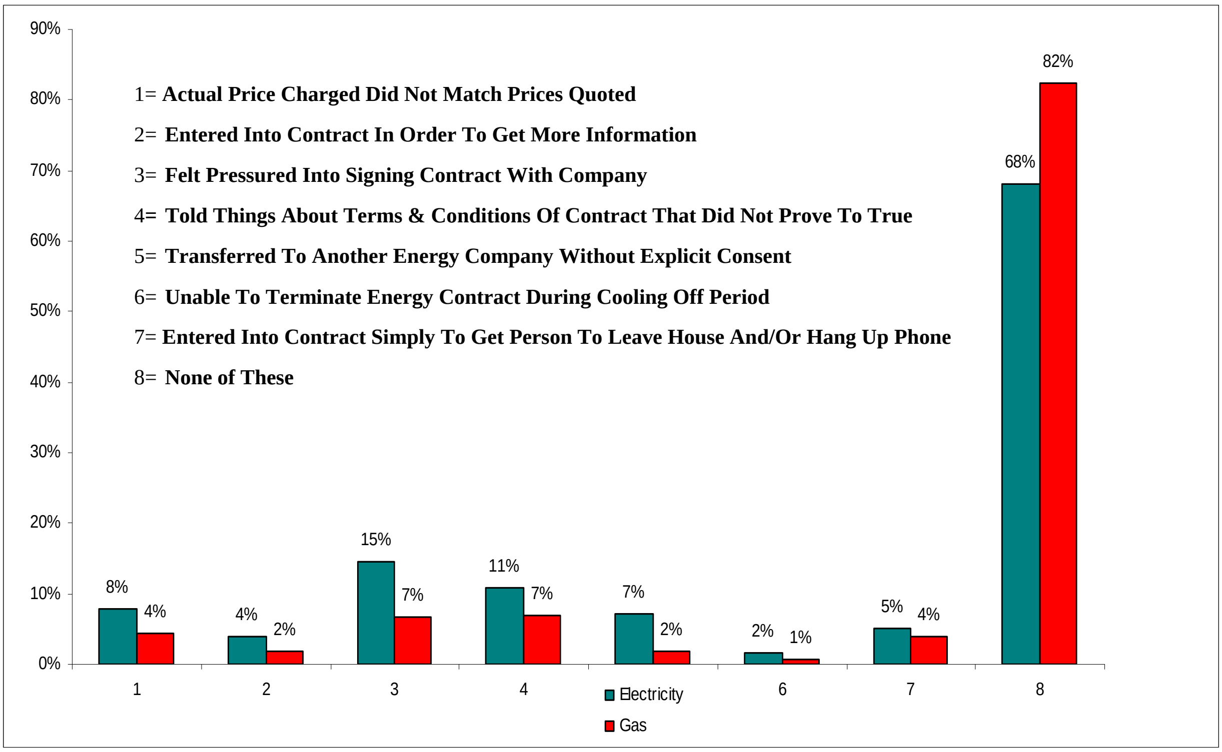
QG40A-D. To what extent do you agree with the following statements?

Base: Total looked for information in the last 12 months to assist in decision (n=64)

4.5 Other experiences/encounters with energy retailers

People were asked if they had experienced any of a variety of situations with their electricity or gas company such as pressure to sign a contract or unexpected/discrepant pricing. Figure 35 shows that 7 in 10 never had; the rate was 8 of 10 for gas. This is another positive "marker" of a competitive marketplace, the absence of coercion and unfair practices.

Figure 35. Experiences with Energy Companies

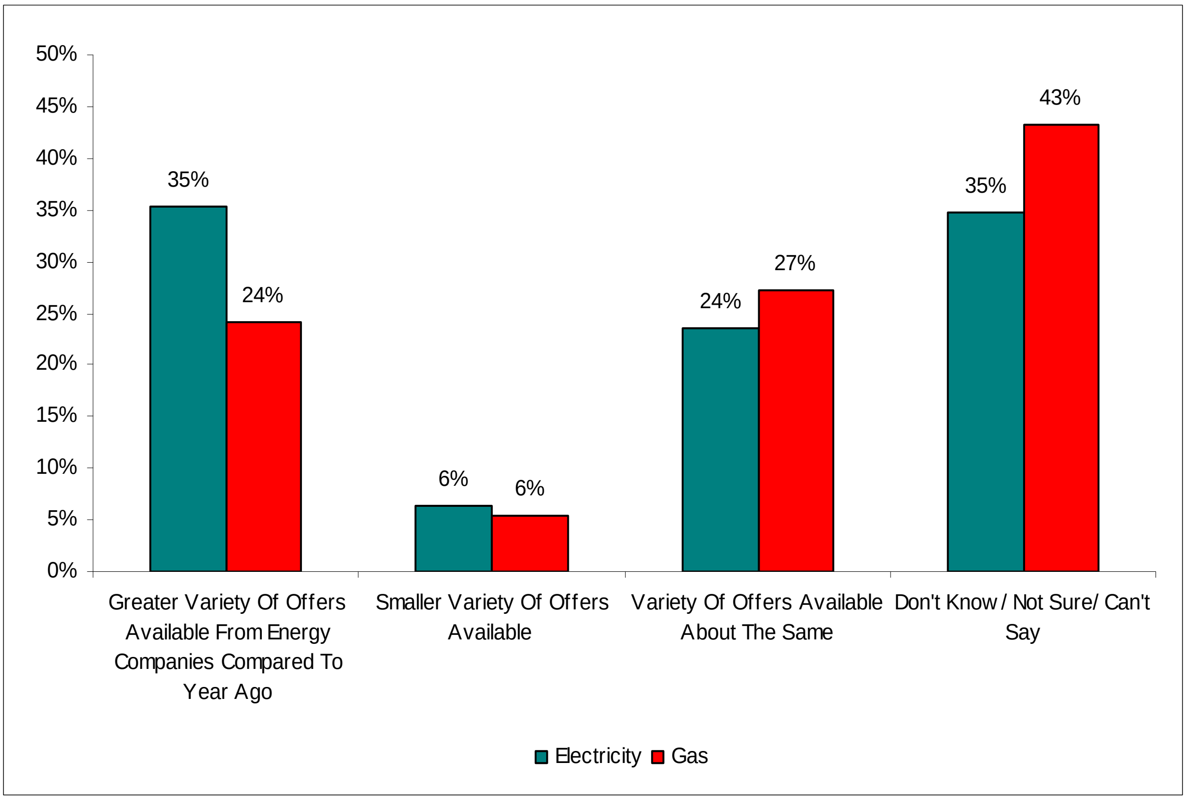


QE42/ QG42. Have you experienced any of the following?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

A question about the variety of offers available compared to a year ago was met by uncertainty for about 4 in 10. This indicates a substantial number of people are disengaged from the process. For the remainder, more people think that variety has increased, as opposed to decreased, from electricity and gas companies (Figure 36).

Figure 36. Variety of Energy Offers Available Compared to Year Ago



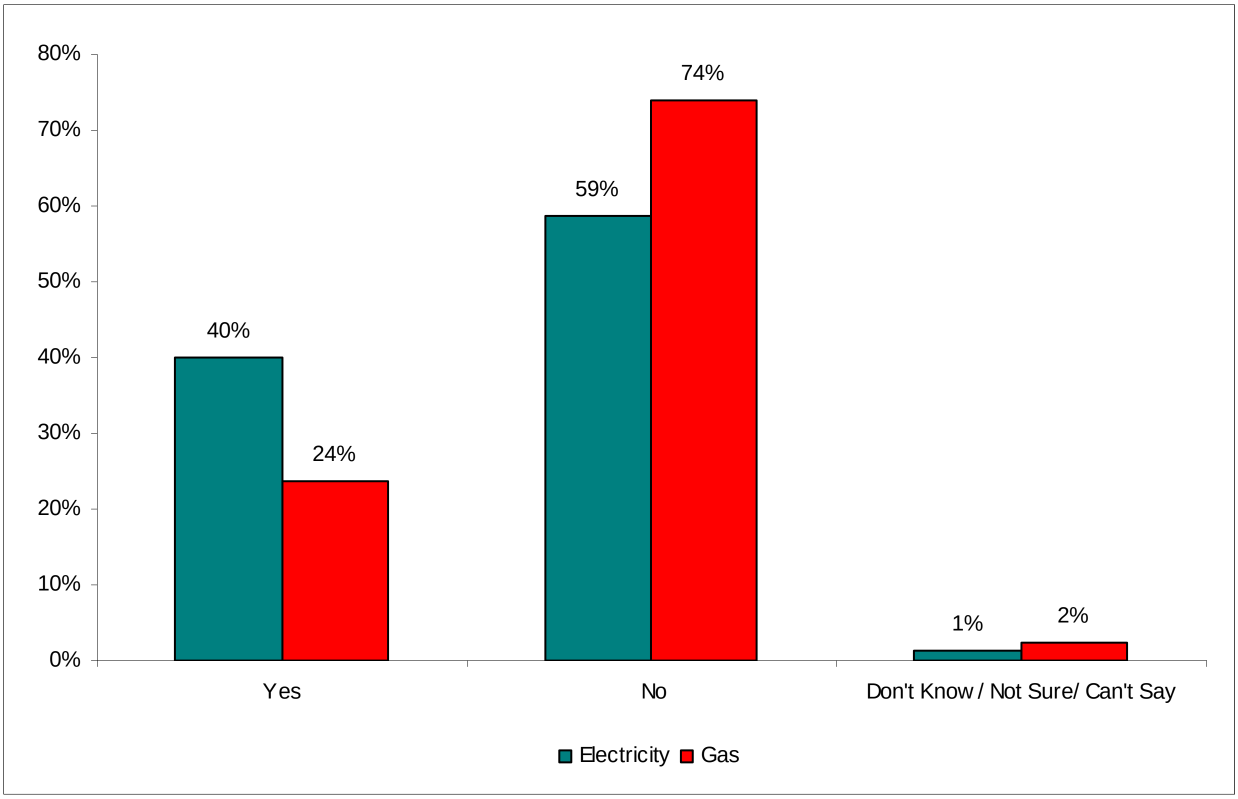
QE46/QG46. Would you say there is …

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

4.6 Customer Service and Company Contact

Most people had not contacted their gas or electricity company in the past 12 months. This was true more so with gas companies where 74% of gas customers answered no (Figure 37). This suggests a general level of satisfaction with retailer performance and perhaps a lower level of calls to gas retailer than electricity retailers about pricing issues and concerns.

Figure 37. Contact with Energy Company in Past 12 Months



QE47/QG47. Have you contacted your energy company in the past 12 months?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

About 65%-70% of those who made contact with the company were satisfied ("somewhat" or "very") with the response timeliness of the response and the assistance provided (Table 3). Metro residents were less likely to be "very satisfied" with response timeliness (23%) compared to non-metro residents (37%).

Table 3. Satisfaction with Response Timeliness and Assistance from Energy Company

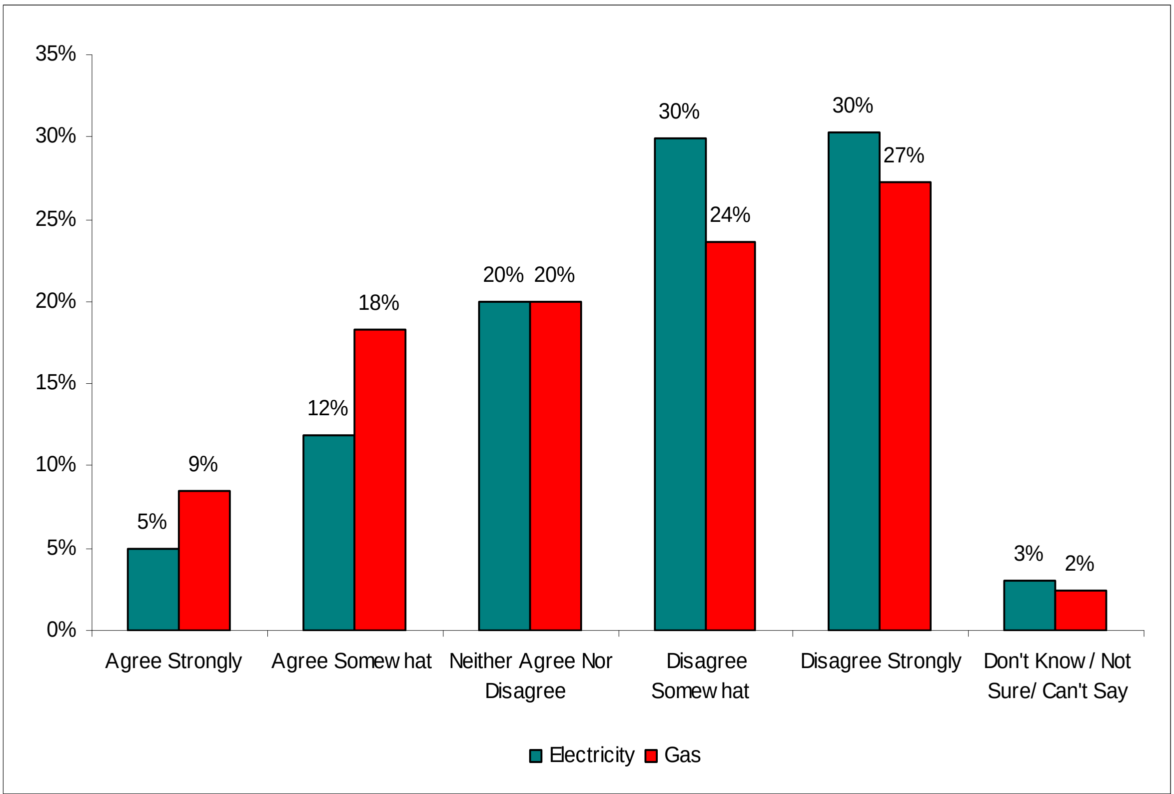
Electricity							
	Very Satisfied	Somewhat Satisfied	Total Satisfied	Neither	Somewhat Dissatisfied	Very Dissatisfied	Total Dissatisfied
Satisfaction with timeliness of response	29%	37%	66%	15%	10%	8%	18%
Satisfaction with assistance provided.	31%	36%	67%	14%	9%	9%	18%
Gas							
	Very Satisfied	Somewhat Satisfied	Total Satisfied	Neither	Somewhat Dissatisfied	Very Dissatisfied	Total Dissatisfied
Satisfaction with timeliness of response	27%	44%	71%	15%	7%	8%	15%
Satisfaction with assistance provided.	32%	39%	71%	9%	7%	12%	19%

QE48A/QG48A. How satisfied were you with…

Base: Total contacted electricity company in the last 12 months (n=389); total contacted gas company in the last 12 months (n=92)

There was little support for the idea of going to the energy companies for advice on purchasing new appliances (Figure 38). Sixty percent did not favour this option for electricity and 51% did not favour it for gas.

Figure 38. Usefulness of Energy Company for Energy Appliance Advice

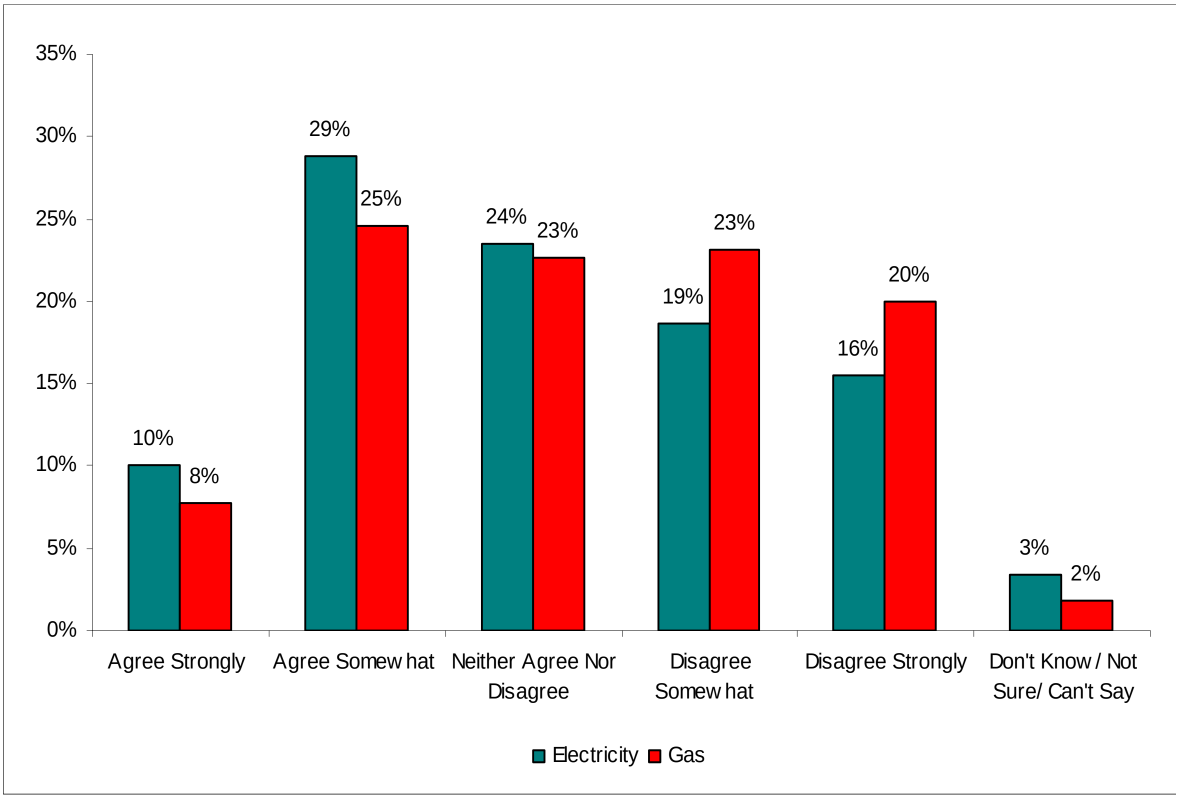


QE49A/QG49A. I would go to my electricity company for advice on purchasing a new energy appliance.

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

There was a greater degree of support for the idea of going to the energy company for ideas on energy efficiency but it still did not reach a majority consensus (Figure 39). Metro residents more often than non-metro residents disagreed with the idea that energy companies were useful for energy saving advice. Thirty seven percent disagreed somewhat or strongly compared to 29% non-metro.

Figure 39. Usefulness of Energy Company for Energy Savings Advice

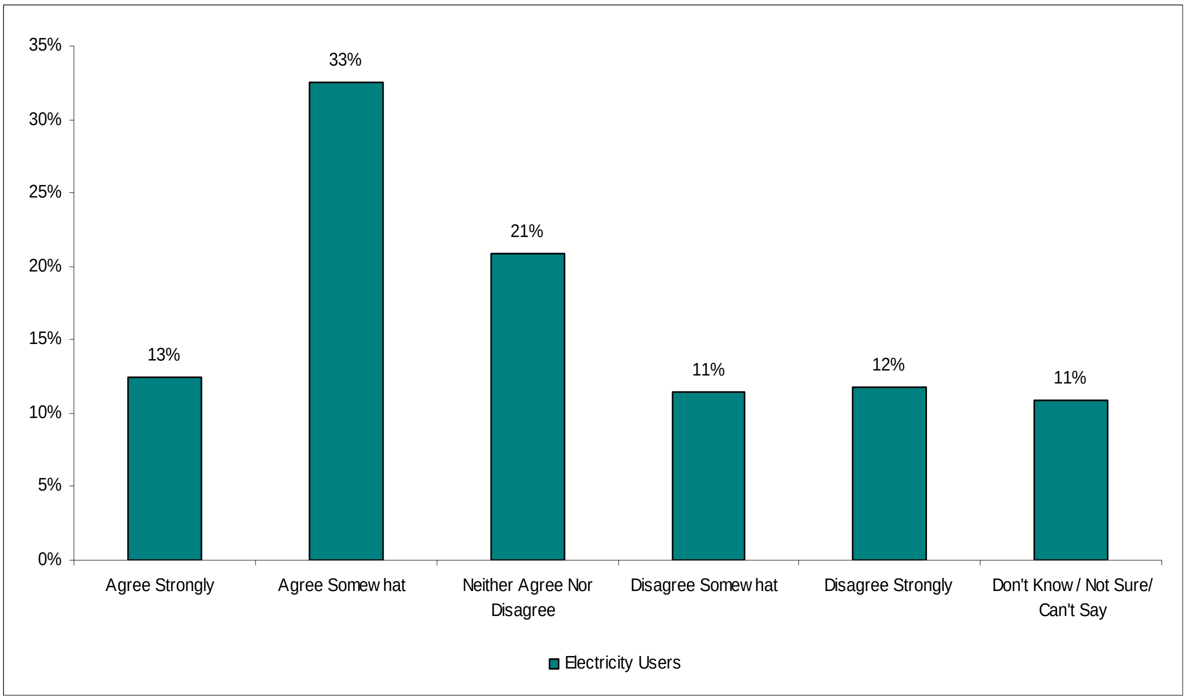


QE49B/QG49B. I would go to my energy company for advice on improving my energy efficiency and decreasing my energy use.

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

Forty-six percent agreed that their electricity company could be relied on for feed-in tariff information (Figure 40). Thirty two percent were neutral or did not know.

Figure 40. Advice from Electricity Company on Feed-in Tariff



QE49C. I would go to my electricity company for advice on feed in tariffs

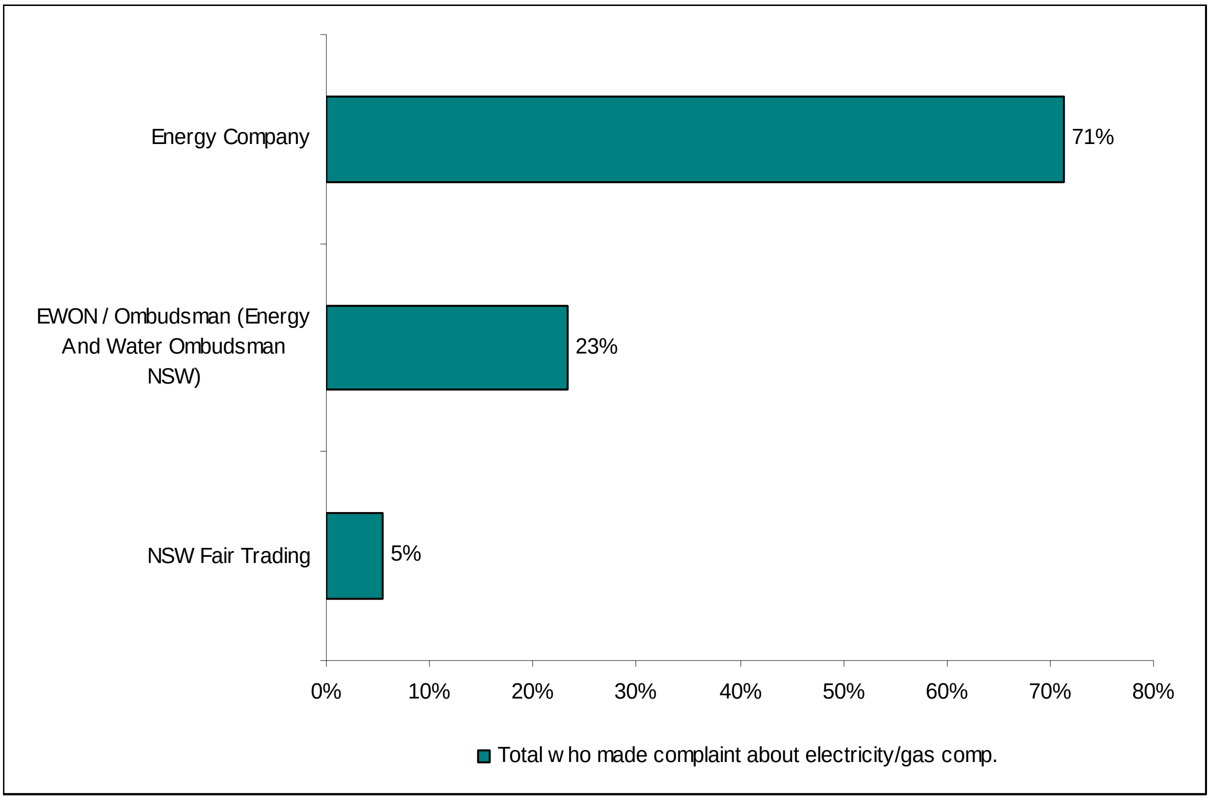
Base: Total use electricity in household (n=999)

Only 12% of participants had entered into an energy contract and used the cooling off period.

Only 13% of participants had lodged a complaint about their energy company.

Seventy percent of those who had a complaint went to the energy company (Figure 41). For people who have not complained, the organization they would go to if they had a complaint was split between the energy company (41%) and EWON/Ombudsman (34%), Figure 42.

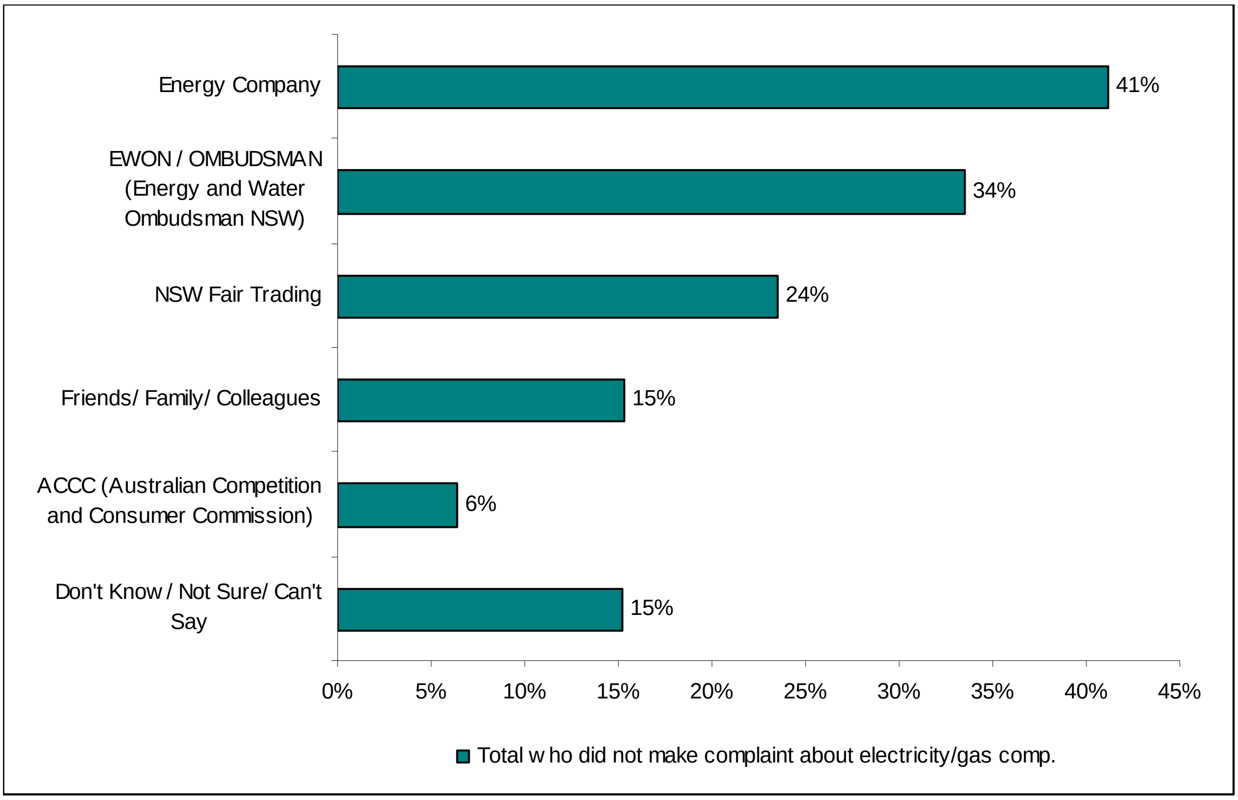
Figure 41. Who Did you Complain to?



Q44. Who did you complain to?

Base: Total who made a complaint about an electricity or gas company (n=127)

Figure 42. Who Would you Complain to?

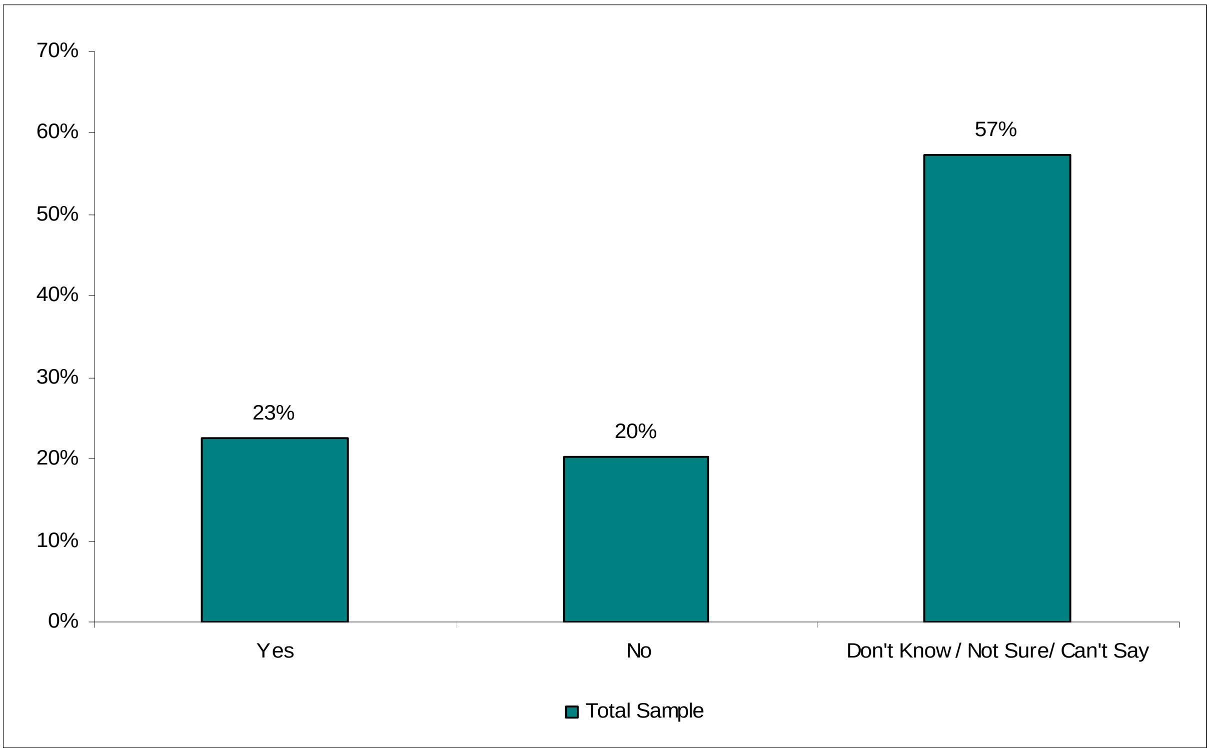


Q45. If you ever did need to complain about an electricity or gas company, who would you go to?

Base: Total who did not make a complaint about an electricity or gas company (n=863)

Awareness is minimal about whether the customer's price is a market or regulated price. Only one in four claim to know (Figure 43). Nearly 60% don't know. Awareness was 26% in metro and 16% non-metro.

Figure 43. Awareness of regulated vs. market price

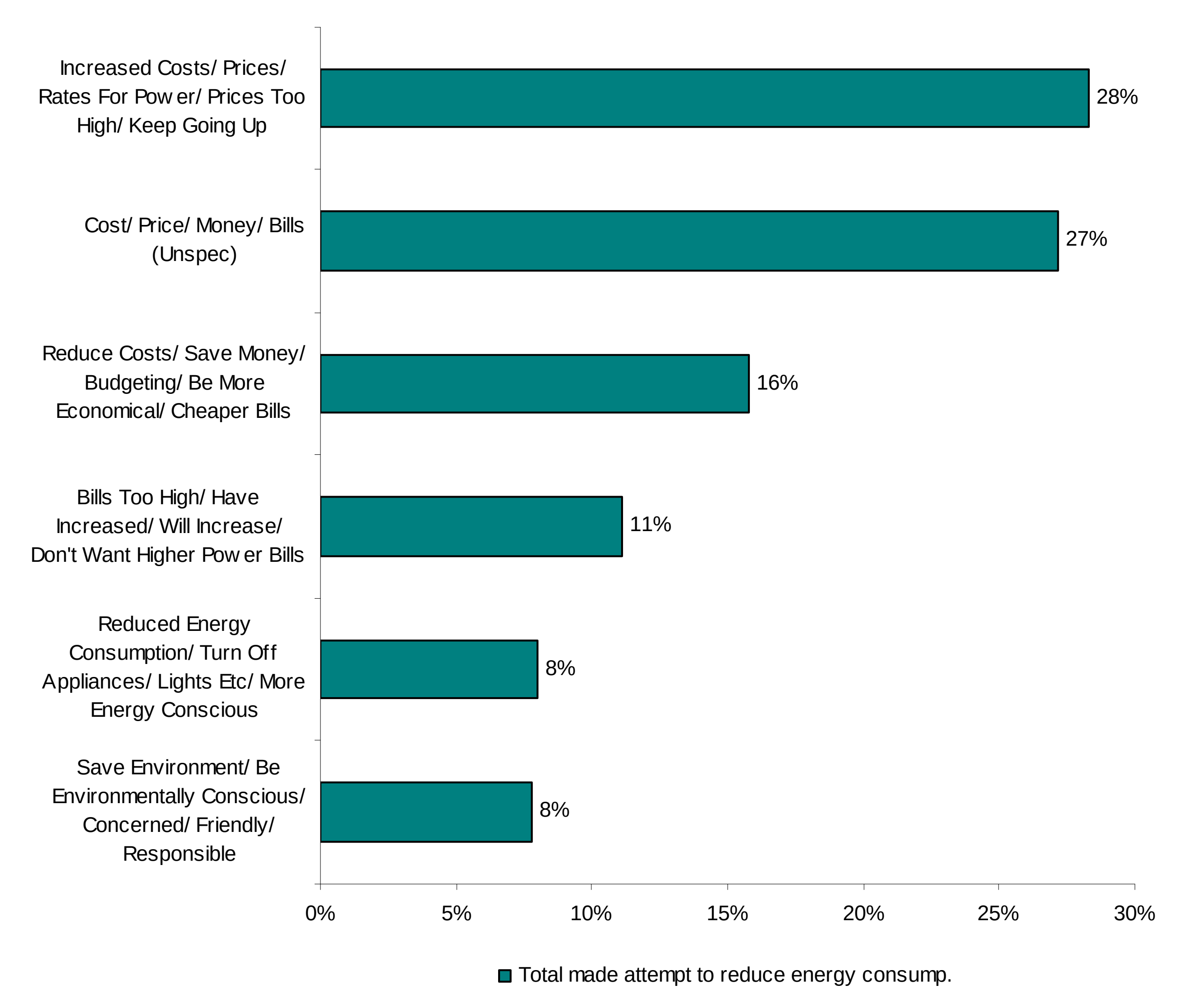


Q49. In terms of the actual unit price (or tariff) at which you consume energy, do know you whether this price is a regulated price or a market price?

Base: Total AEMC consumer sample (n=1001)

More than 8 people in 10 (84%) made attempts to conserve energy in the past year. This rate rose to 88% for those receiving a higher electricity bill. It was also 88% among non-metro respondents (compared to 82% in metro regions). Monetary savings was the prime motivator for the measures taken. It factored in the top four categories, as shown in Figure 44. The top category "increased cost/prices" was more commonly cited by those living in non-metro areas (34%) than metro (25%).

Figure 44. Main Factor Causing Energy Saving Behaviour



Q51. What was the main factor that influenced your decision to attempt to reduce your energy consumption in the last 12 months?

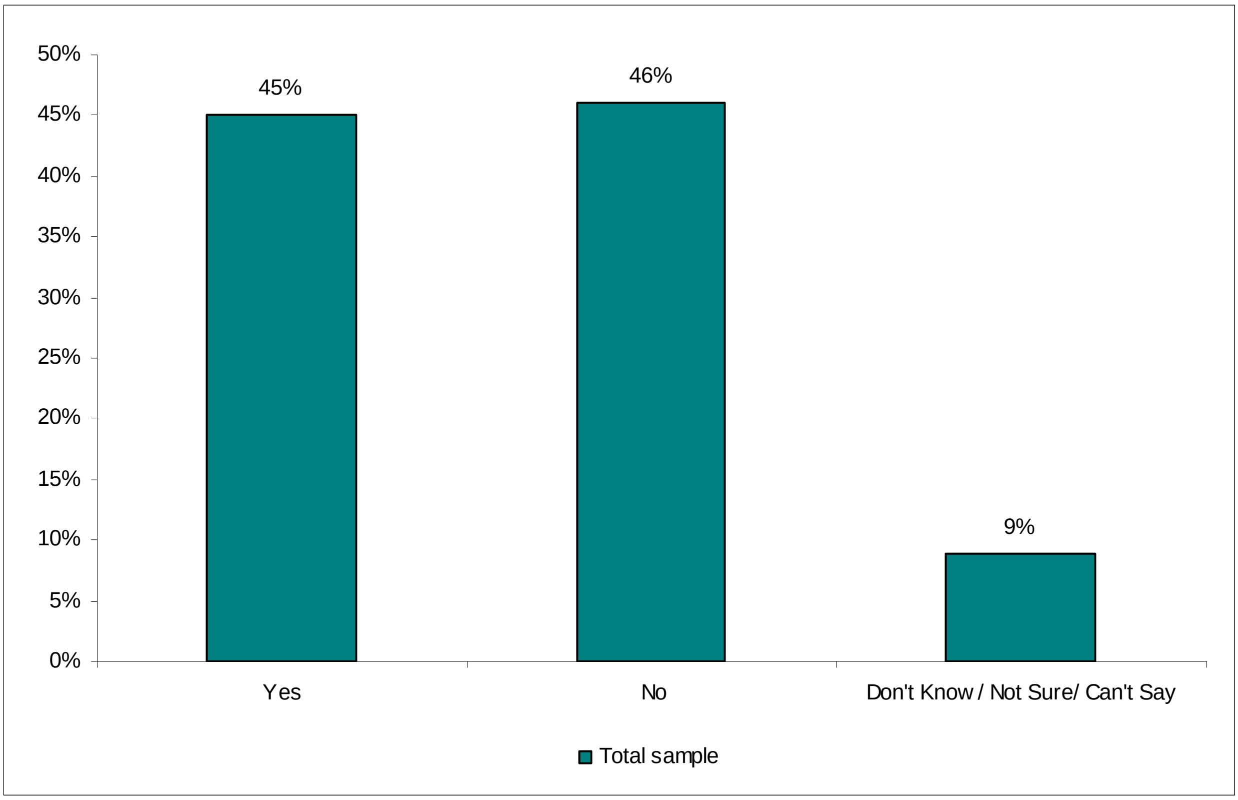
Base: Total made attempt to reduce energy consumption in last 12 months (n=830)

Awareness of time of day pricing was quite high. Nearly 8 in 10 (77%) were aware of it. Almost half (48%) were not sure whether their living arrangement allows it and 25% were sure it was not allowed where they lived.

Nearly half of the sample was not aware that assistance is available regarding energy price comparisons and decision making (Figure 45). Similarly, awareness of NSW price comparison websites was low, only 1 in 5 (Figure 46).

Efforts here could serve to improve perceived competitiveness and foster customer investigations into switching.

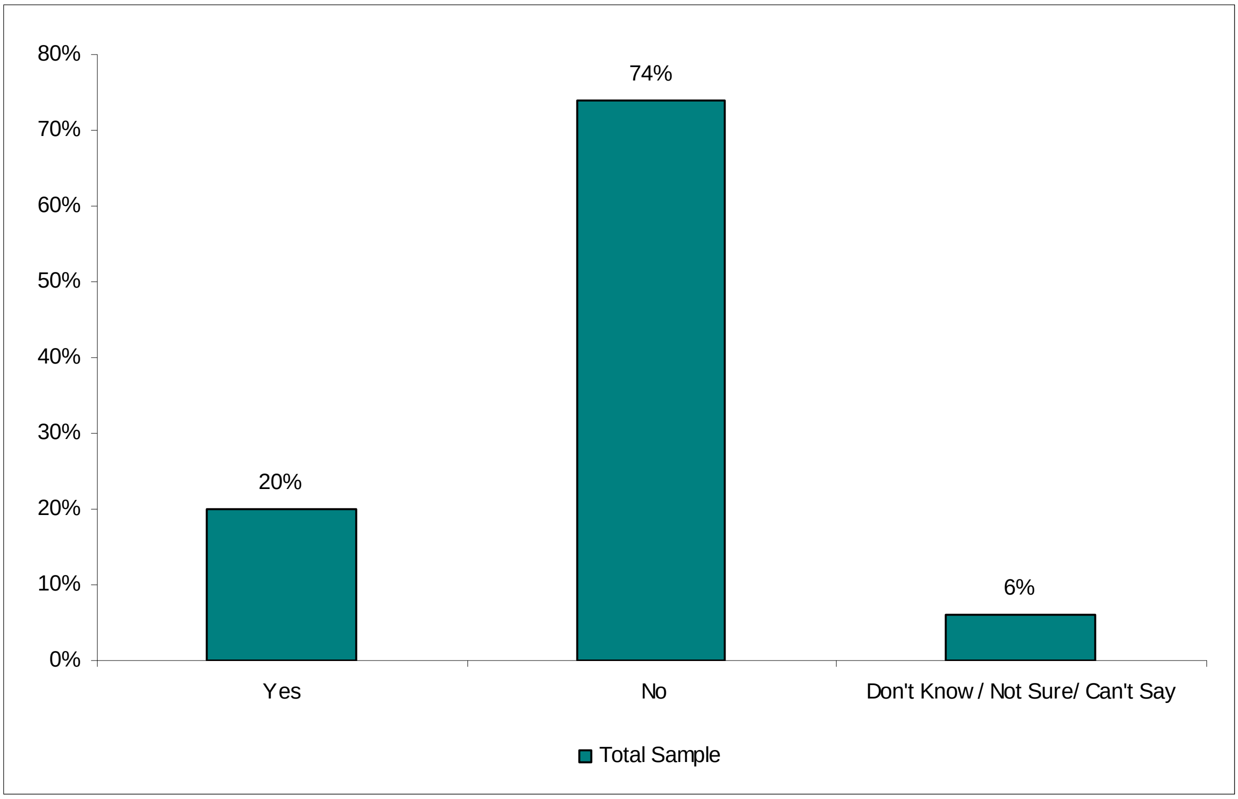
Figure 45. Availability of Assistance on Energy Pricing



Q55. Are you aware of the availability of any assistance to help in comparing energy prices between retailers and making energy decisions, such as price comparator websites or other energy brokers?

Base: Total AEMC consumer sample (n=1001)

Figure 46. Awareness of Price Comparison Websites



Q56. Are you aware of the availability of the NSW price comparator website, My-Energy-Offers, which is independent, free and may help you to compare energy prices between retailers?

Base: Total AEMC consumer sample (n=1001)

5. ADDITIONAL ANALYSES: RE-ASSIGNMENT OF REGIONS

After the report was issued, an alternative regional assignment scheme was suggested placing the Hunter and Illawarra regions in the Metro grouping rather than in the Non-Metro grouping. This reassignment of regions was suggested in light of the PIAC report *Choice? What Choice?*[5] which suggested that customers in Sydney and surrounding areas (including these areas) were exposed to higher levels of competition than customers in regional centres.

Data from several of the residential survey questions were re-analysed with Hunter/Illawarra region respondents assigned to the Metro category and removed from the Non-Metro category.

The questions examined were:

- awareness of choice of energy supplier – electricity
- approached by electricity company selling electricity
- method of last electricity sales approach
- switched electricity company since 2002
- changed electricity arrangements with current supplier
- awareness of choice of energy supplier- gas
- approached by gas company selling gas
- method of last gas sales approach
- switched gas company since 2002
- changed gas arrangements with current supplier

In summary, for 9 of the 10 comparisons, shifting Hunter/Illawarra made no statistical difference. If the metro/non-metro split was significant before moving Hunter/Illawarra it was still significant after; if it was not significant before, it was not significant after.

The only exception was "was approached by a gas company selling gas." The metro/non-metro difference was not significantly different from the total before but it was after moving Hunter/Illawarra into Metro.

A detailed table comparing the findings prior to and after the reassignment of the two regions for the questions examined can be found in Appendix 1.

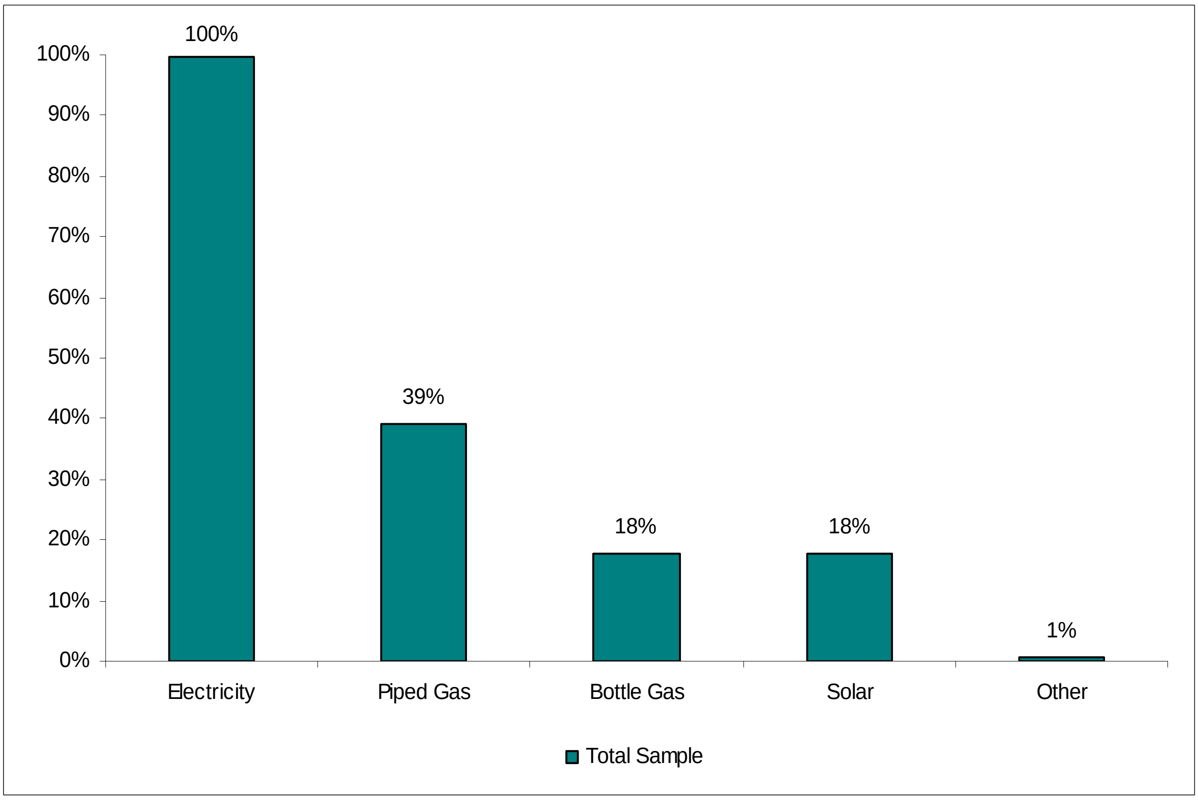
[5] PIAC, *Choice? What Choice?*, June 2011

6. SAMPLE PROFILE

A variety of demographic questions were asked in the survey. The data are shown in this section.

The energy ownership profile of the sample is shown below (Figure 47). The figure shows that 100% use electricity but this is due to rounding. There were actually 2 participants who claimed to use gas and not electricity.

Figure 47. Energy ownership

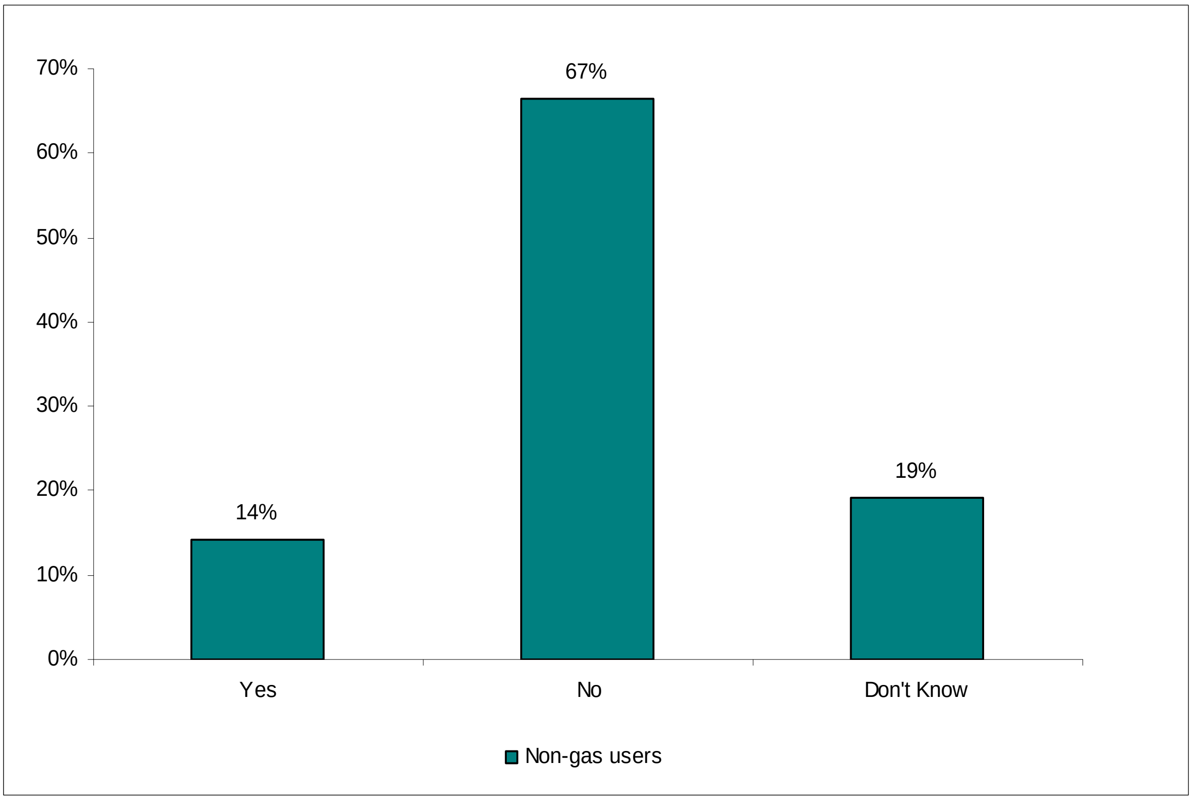


QS2. For this residence, what types of energy does your household use?

Base: Total AEMC consumer sample (n=1001)

Figure 48 shows that most people who do not have gas do not think they can connect to it at their current location or do not know.

Figure 48. Ability of People without Gas to Connect to Gas

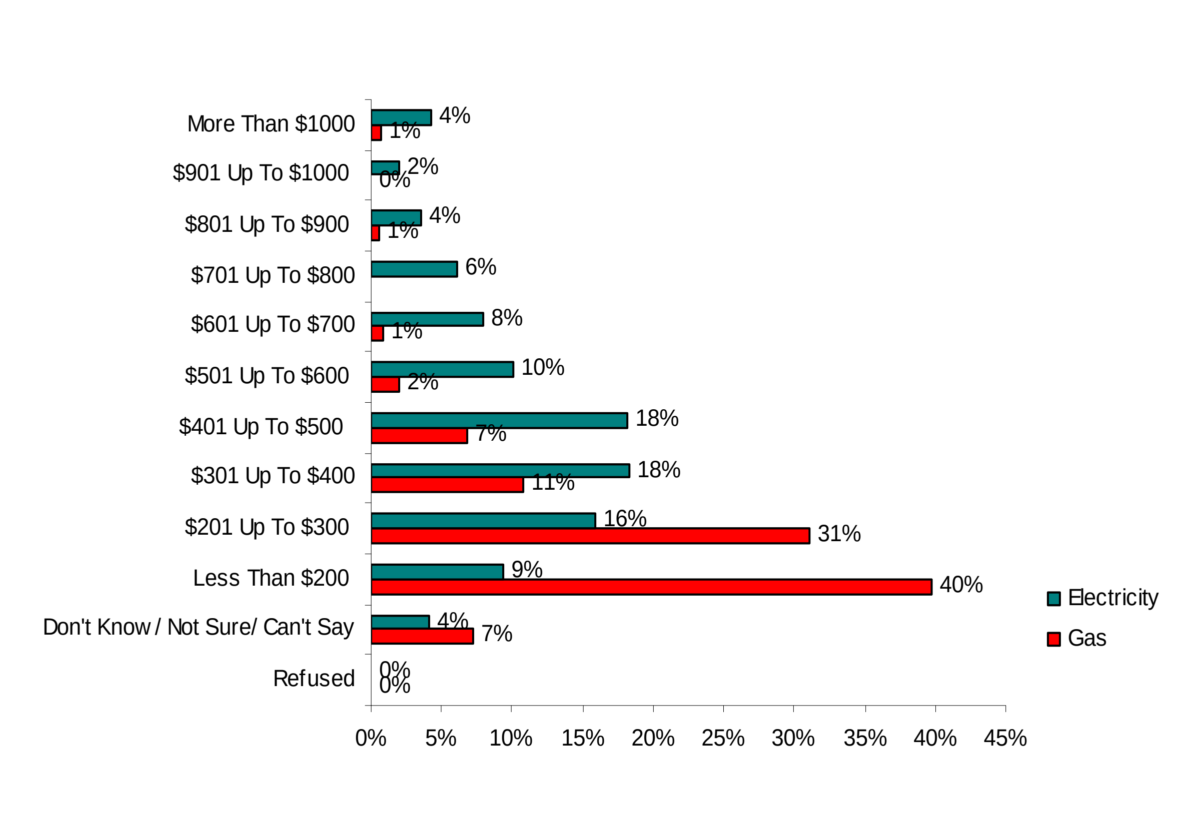


QS2a. Are you able to connect to piped natural gas at your current residence?

Base: Total use electricity and not piped natural gas in household (n=615)

Figure 49 shows that the most recent quarterly household electricity bill was most commonly $300-$400 (18%) or $401-$500 (18%). The modal (most frequently occurring) answer for gas bills were under $200 per quarter, at 40%.

Figure 49. Most recent electricity and gas bill (cost per quarter)

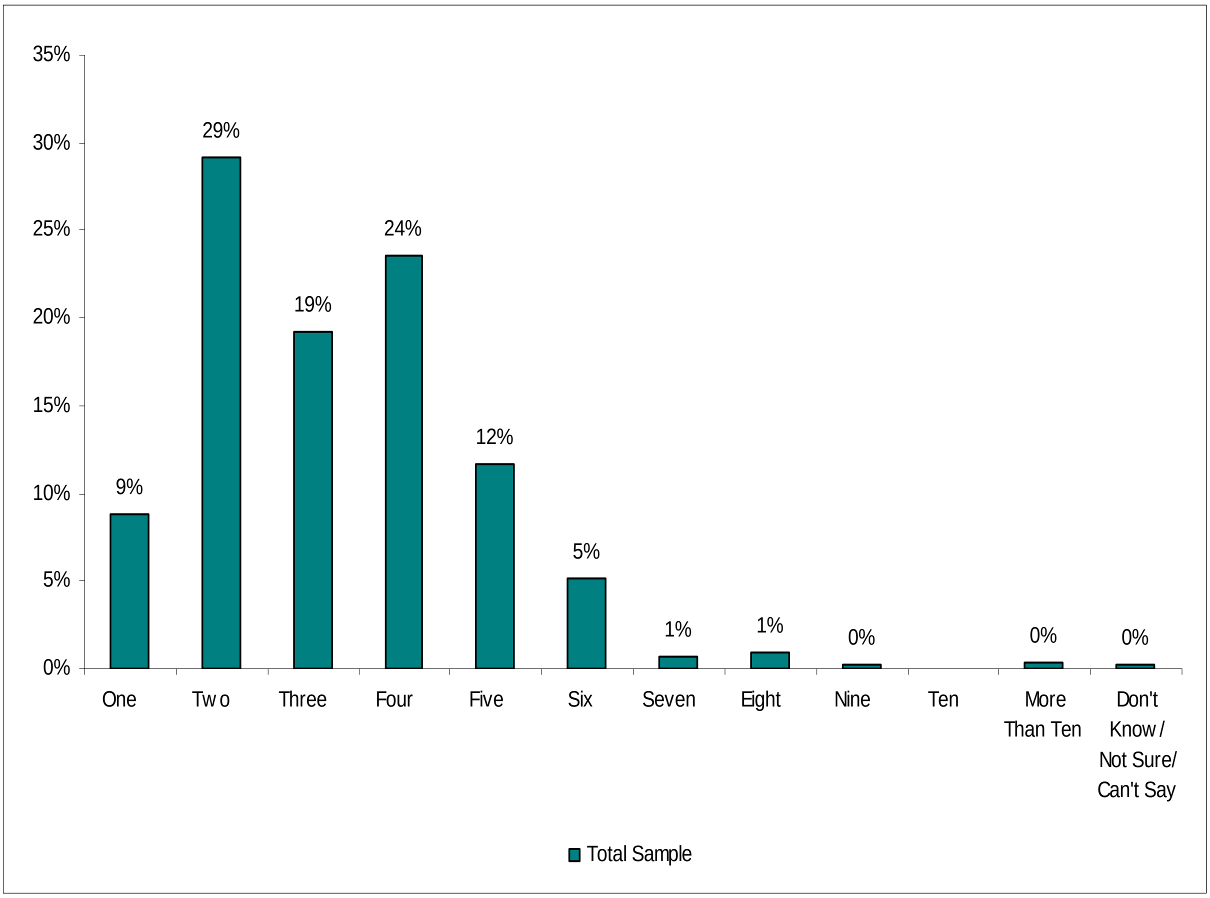


QE2/QG3. How much was your most recent energy bill?

Base: Total use electricity in household (n=999); total use piped natural gas in household (n=386)

Figure 50 shows that the two person household was the most common category in the sample. Eighty percent of the total was accounted for with household of 4 people or fewer.

Figure 50. Number of People in Household

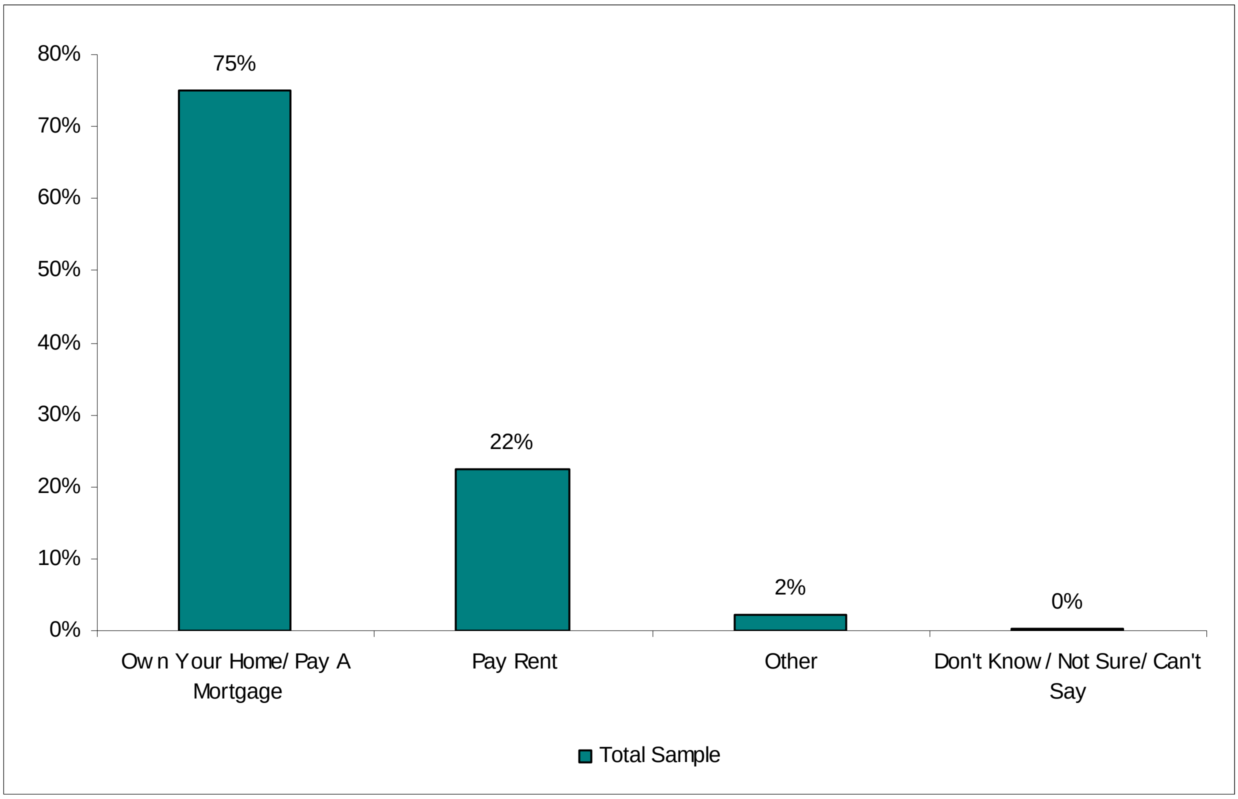


QX3. How many people live in your household?

Base: Total AEMC consumer sample (n=1001)

Three quarters of the sample own their home or are paying it off (Figure 51).

Figure 51. Do you own your own home/pay a mortgage/pay rent?

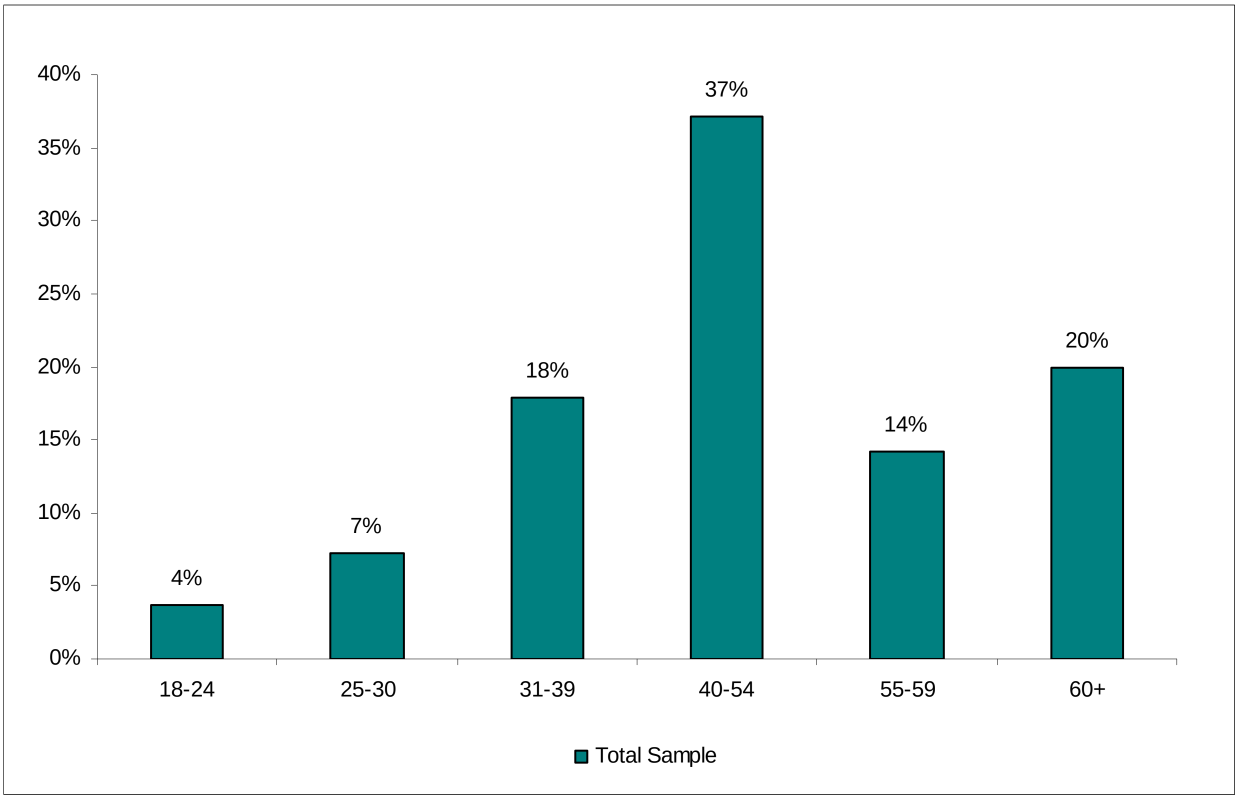


QX4. Do you...?

Base: Total AEMC consumer sample (n=1001)

Figure 52 shows that the most common age group for the sample was 40-54. Fifty-five percent of the sample was between 31-54 years of age.

Figure 52. Current Age

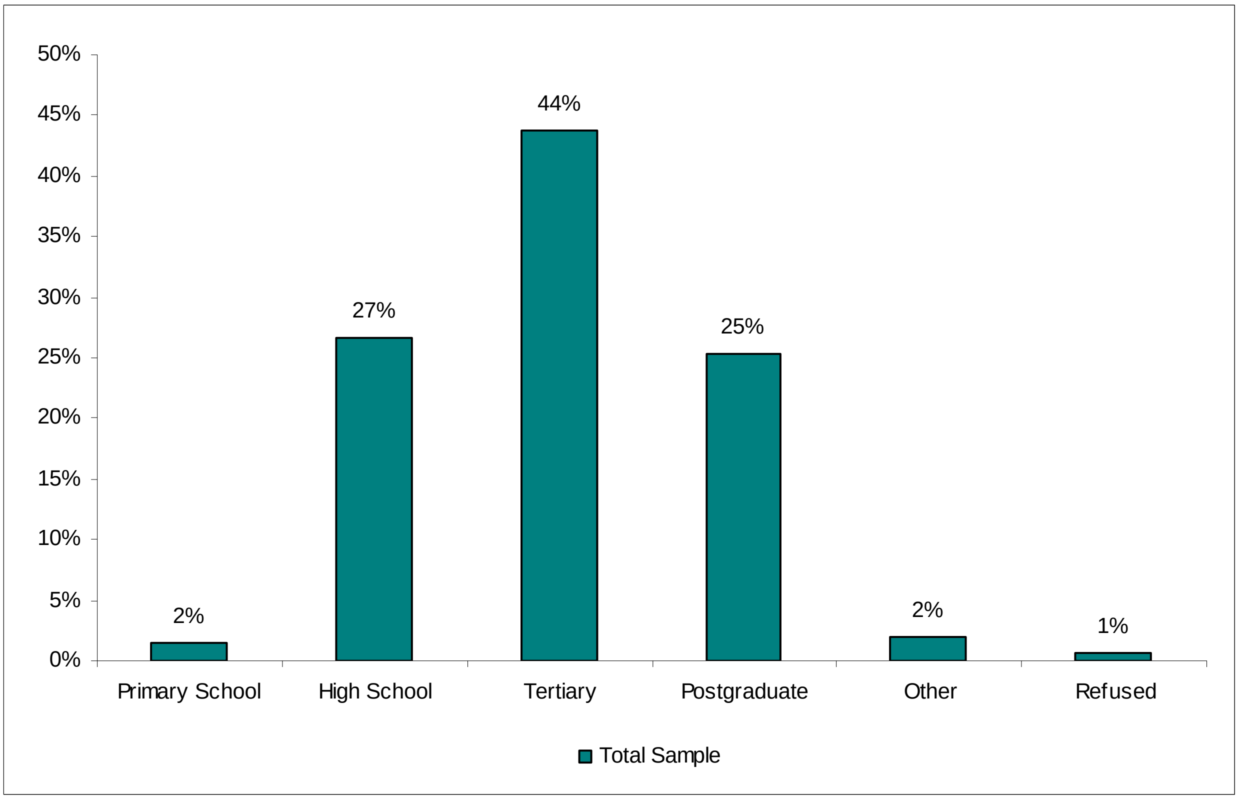


QX5. Can you please tell me your age?

Base: Total AEMC consumer sample (n=1001)

Nearly 70% had some tertiary or postgraduate education[6] (Figure 53).

Figure 53. Highest Level of Education



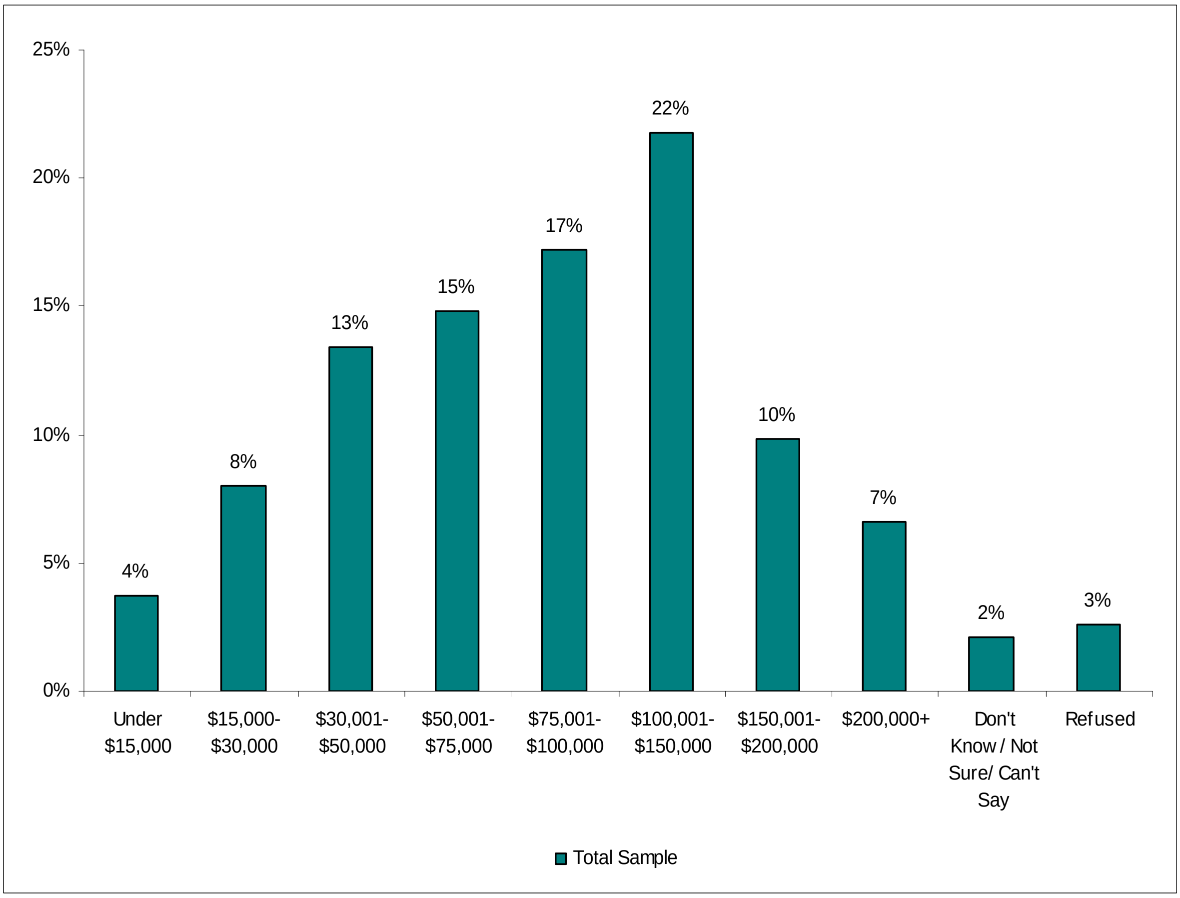
QX6. What is your highest level of education?

Base: Total AEMC consumer sample (n=1001)

[6] This figure may strike the reader as unusually high but recall that the sample comprises people 18+ who are heads of household in the sense of being energy decision makers. The rate of tertiary education as a percentage of the entire state's population is much lower.

The most frequent household income category was $100,001- $150,000 (22%), Figure 54. Those whose income exceeded $75,000 were 56%; those who incomes were below were 40%. The balance chose not to answer the question.

Figure 54. Gross Annual Household Income

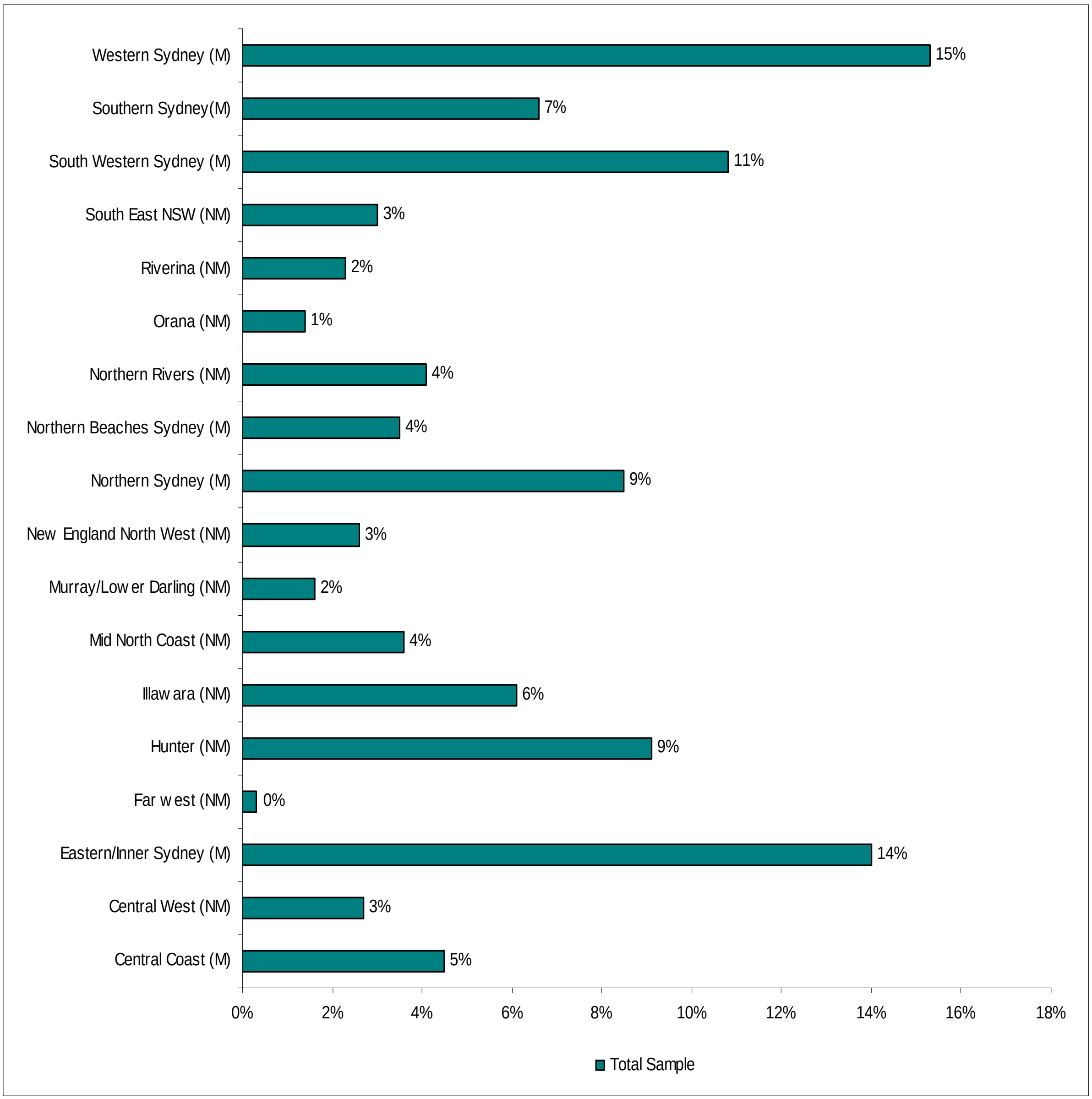


QX7. Which of the following best describe your Gross Annual Household Income?

Base: Total AEMC consumer sample (n=1001)

The home location of the sample by region is shown in Figure 55.

Figure 55. Home Region (M=Metro, NM= Non-metro)

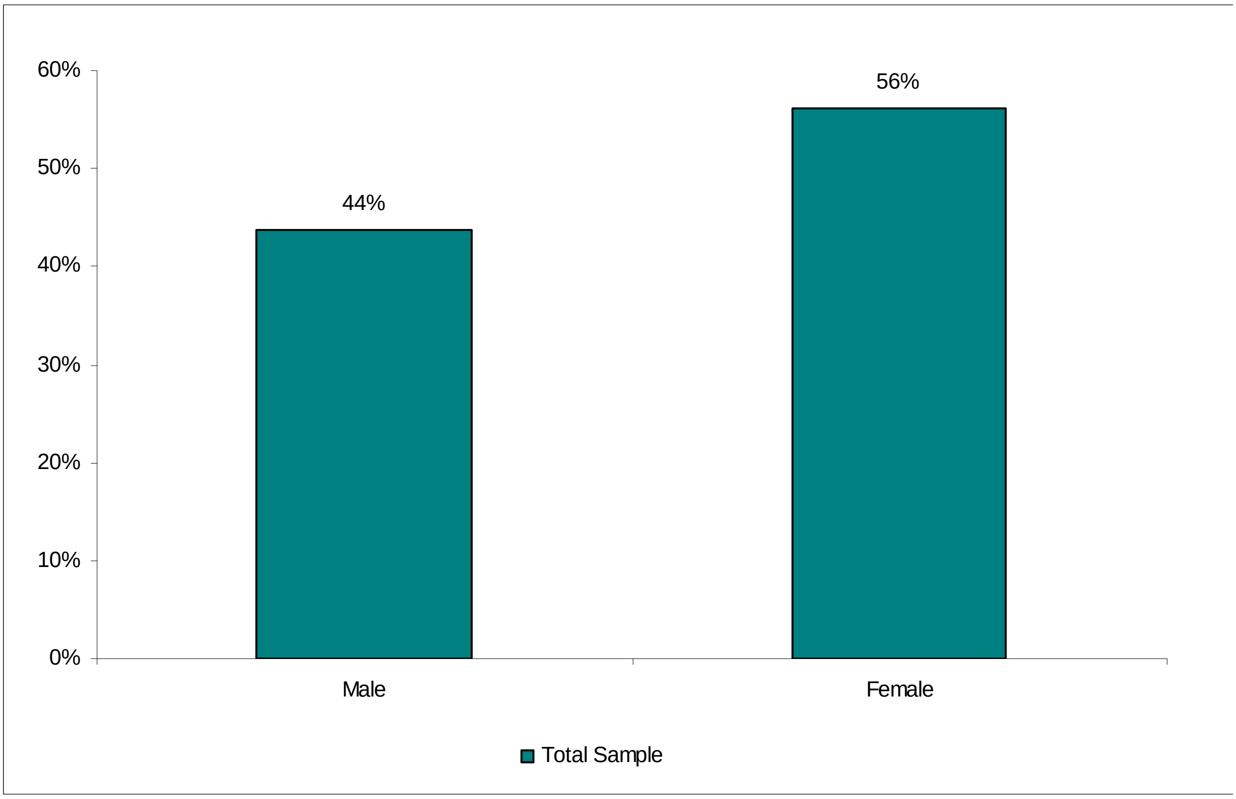


QX8. Can I please have your postcode?

Base: Total AEMC consumer sample (n=1001)

The sample comprised 44% males and 56% females (Figure 56).

Figure 56. Sex of Sample



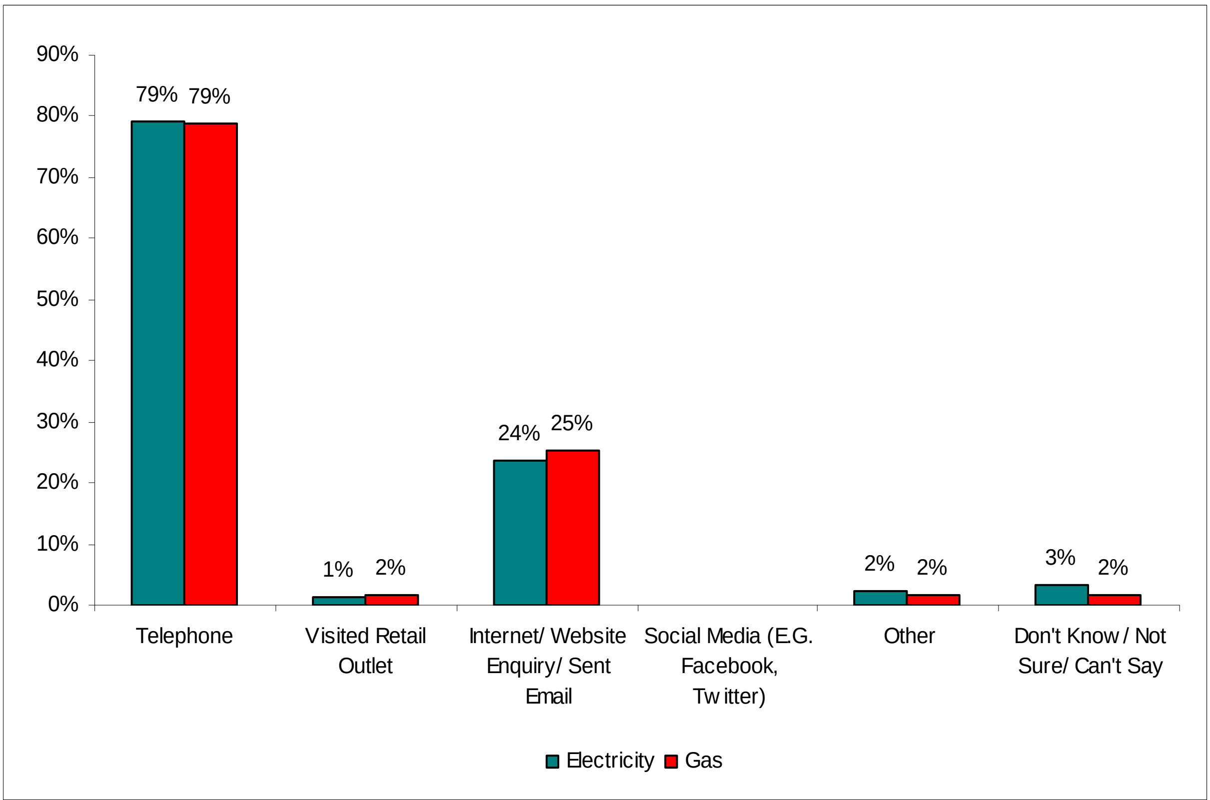
7. DATA WEIGHTING

The survey data were weighted by Roy Morgan Research Data Analysts to ensure that the final data is proportional to pertinent population statistics. The domestic consumer sample received a primary weighting on household size and secondary weighting on the region variable. Data shown in the results figures reflect weighted percentages. Bases listed under each figure reflect the unweighted counts.

8. EXPANDED/ADDITIONAL DATA CHARTS

As mentioned in the report, some data charts were edited due to space considerations. Answers given by smaller percentages of respondents were deleted; in some cases, results were conveyed in text rather than visually. This section shows expanded figures or those that were described in text.

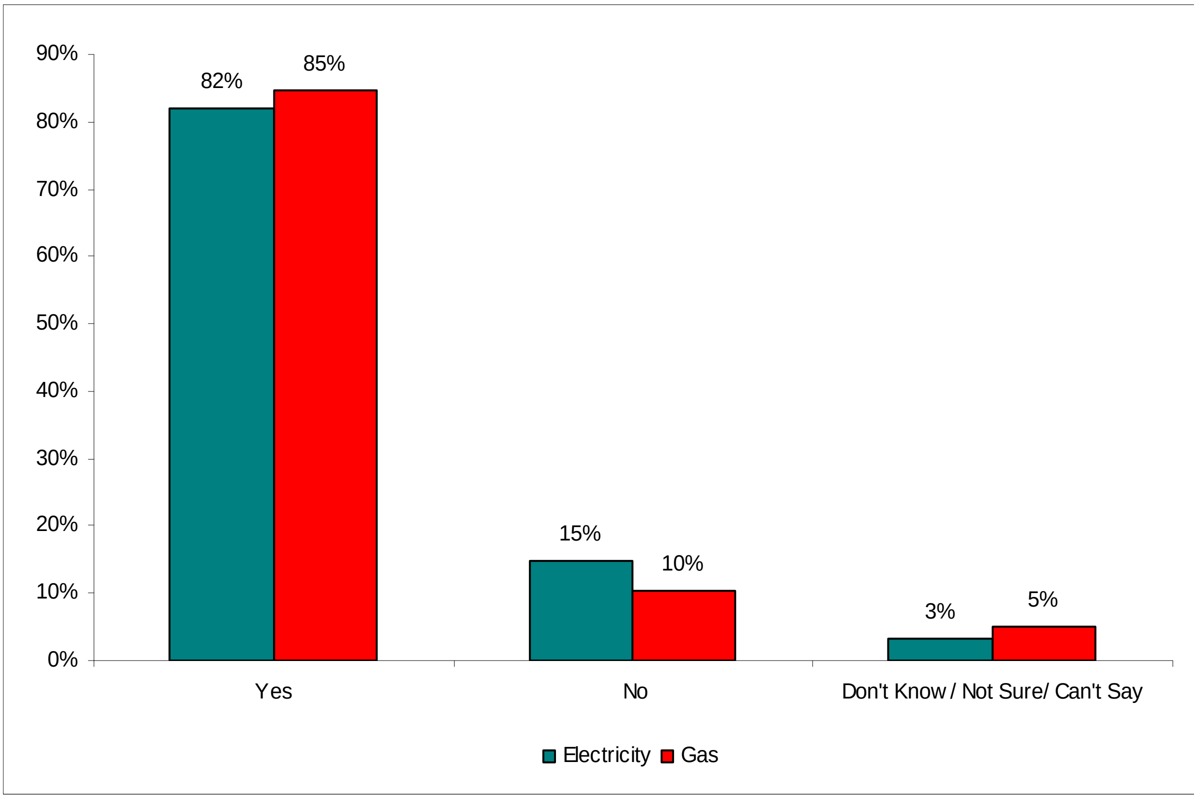
Method of Customer Contacting Energy Company (mentioned in text, page 18)



QE11/QG11. Thinking about the last electricity (gas) company that you approached, how did you do this?

Base: Total approached electricity company including existing company to ask about buying electricity from them (n=252); total approached gas company including existing company to ask about buying gas from them (n=73)

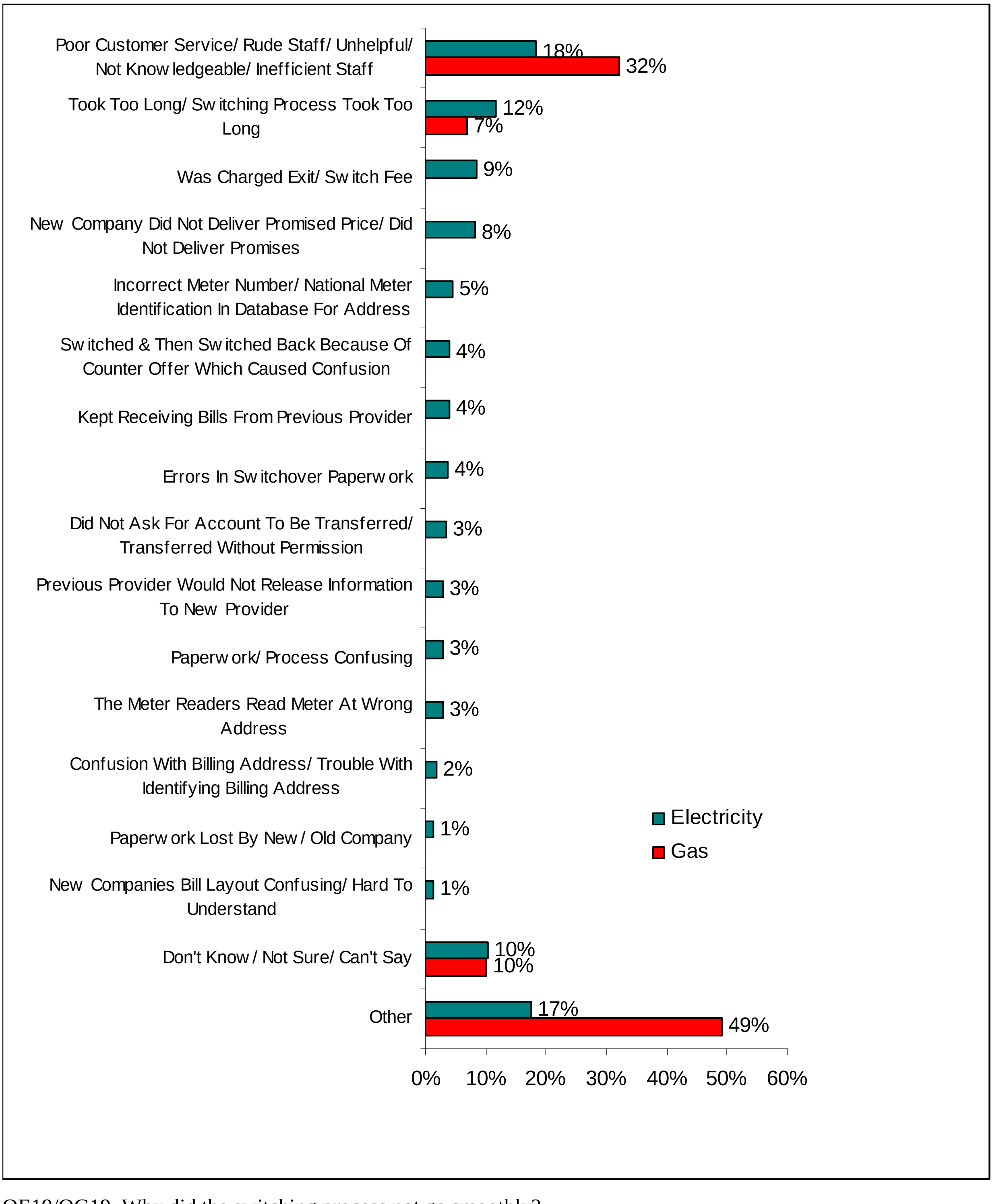
Smoothness of Switching Process (mentioned in text page 27)



QE18/QG18. Did the switching process go as smoothly as expected?

Base: Total switched electricity companies (n=520); total switched gas companies (n=128)

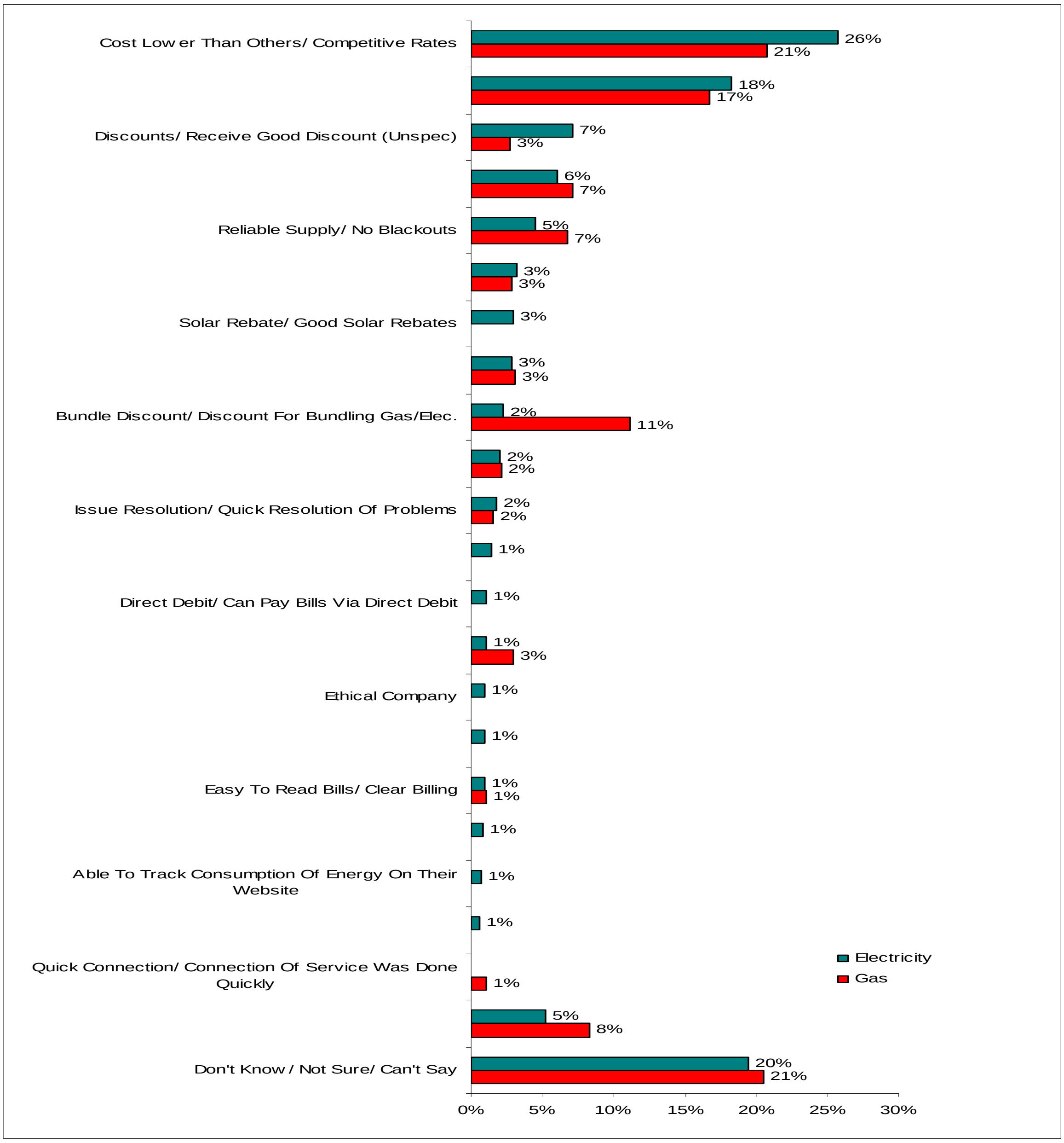
Figure 19. Why Switching Process Was Not Smooth (complete version)



QE19/QG19. Why did the switching process not go smoothly?

Base: Total did not have a smooth elec. switching process (n=73); total did not have a smooth gas switching process (n=15)

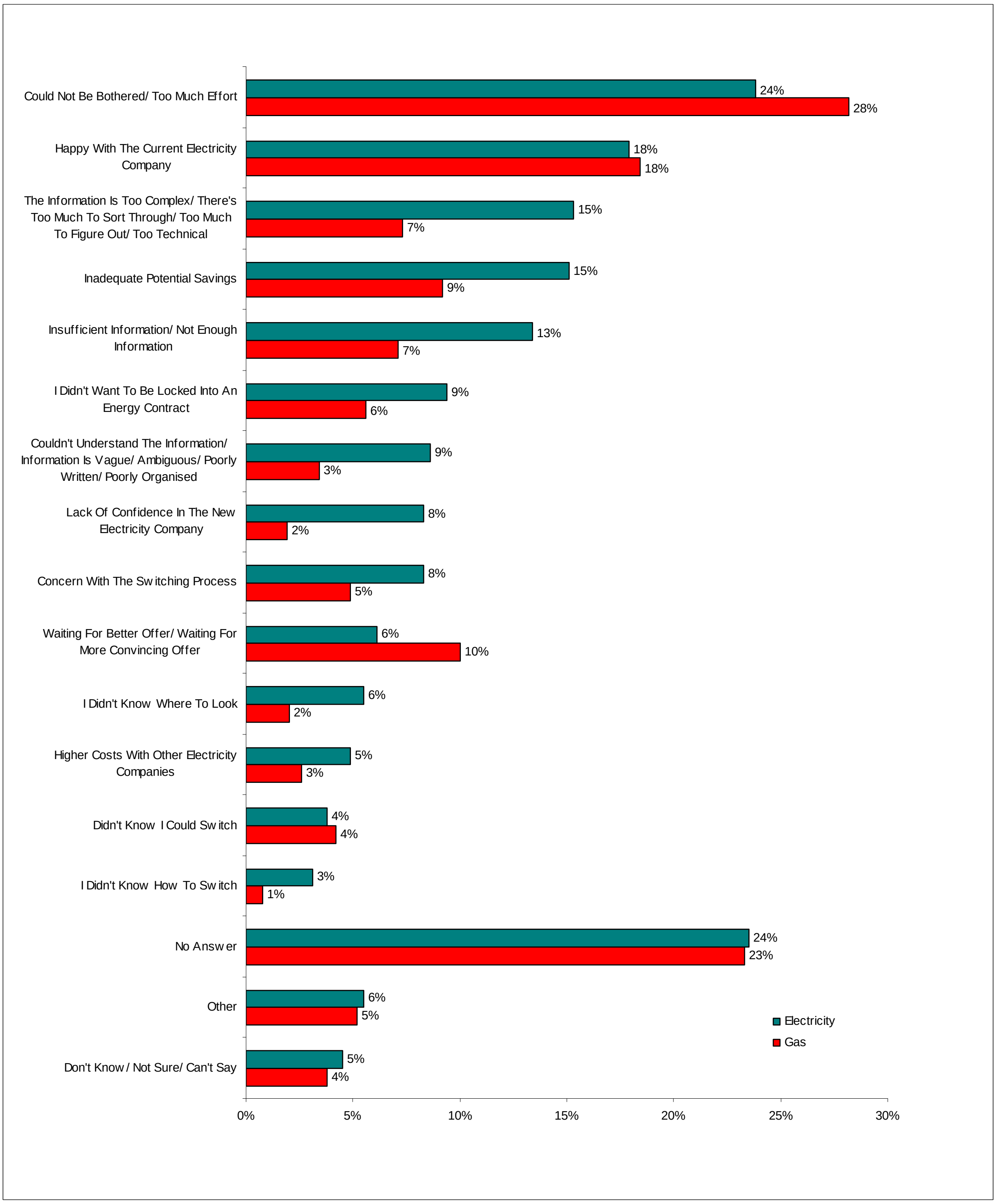
Figure 21. Reasons for Satisfaction with New Energy Company (complete version)



QE24/QG24. Why are you satisfied with your new energy company?

Base: Total very satisfied or somewhat satisfied with new electricity company (n=297); total very satisfied or somewhat satisfied with new gas company (n=79)

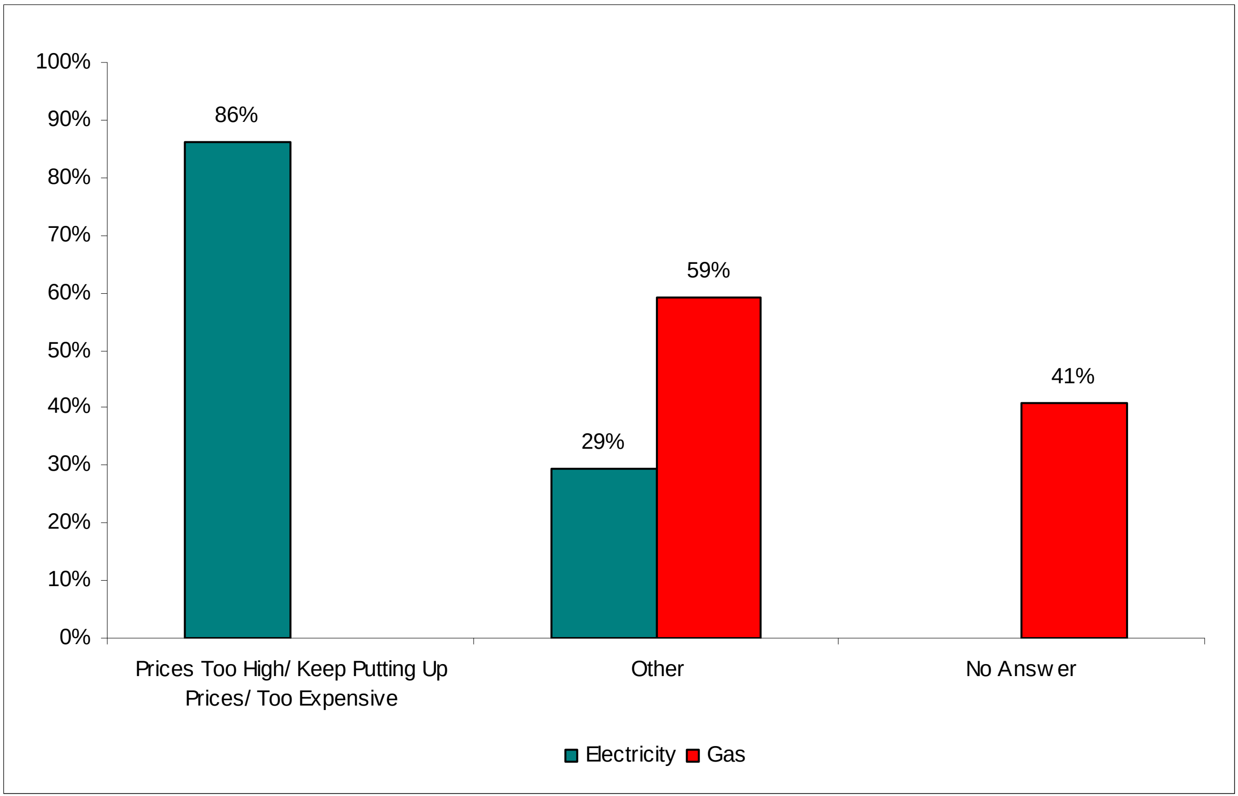
Figure 23. Reasons Why Arrangements with Company Not Changed (complete version)



QE34/QG34. Why haven't you made any changes to the way you buy energy?

Base: Total not changed any arrangements (n=343); total not changed any arrangements (n=194)

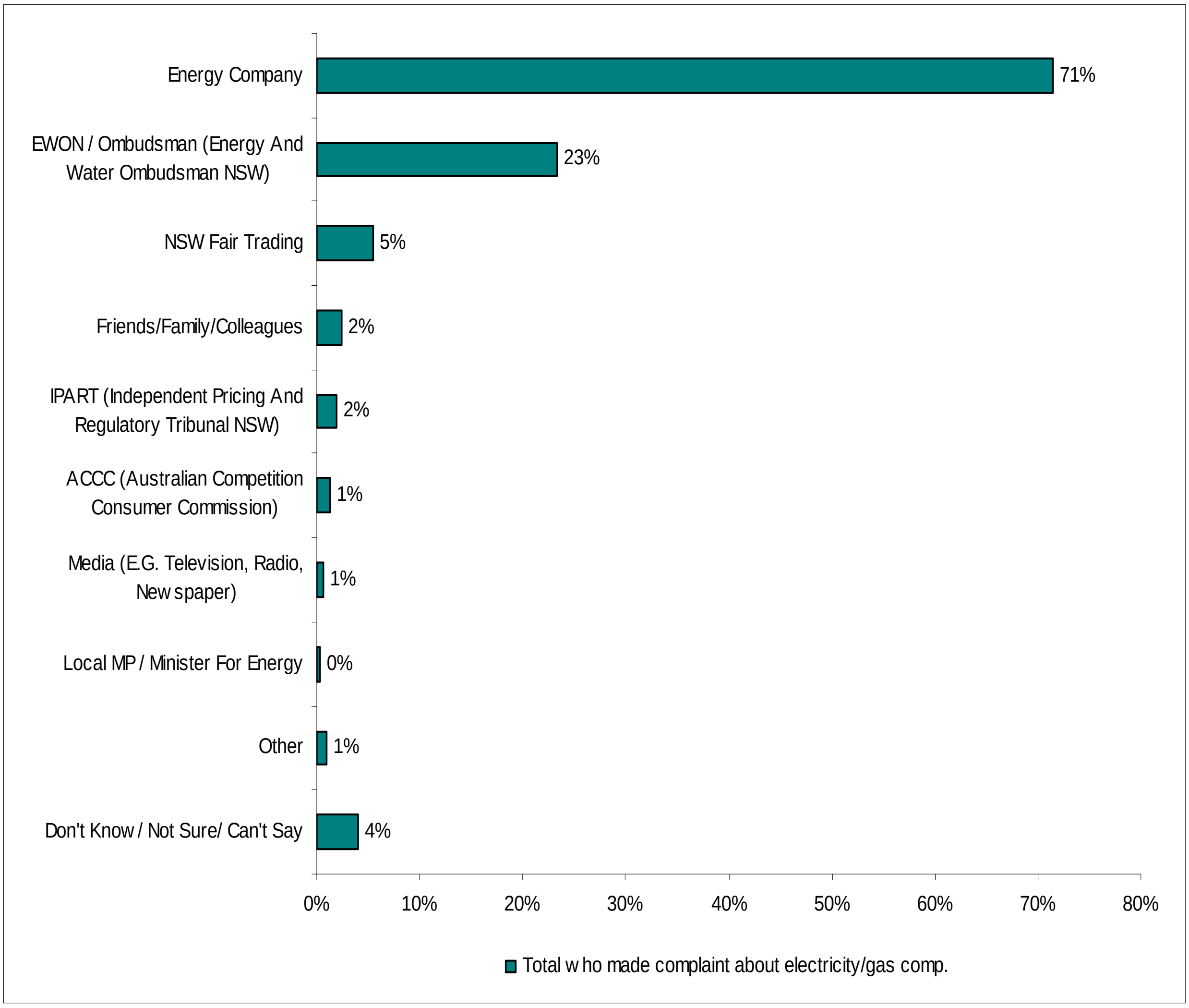
Reasons for Dissatisfaction with New Arrangements (mentioned in text p.35)



QE30/QG30. Why were you dissatisfied?

Base: Total somewhat dissatisfied or very dissatisfied with new electricity supply arrangments (n=7); total somewhat dissatisfied or very dissatisfied with new gas supply arrangments (n=2)

Figure 41. Who Did you Complain to? (complete version)

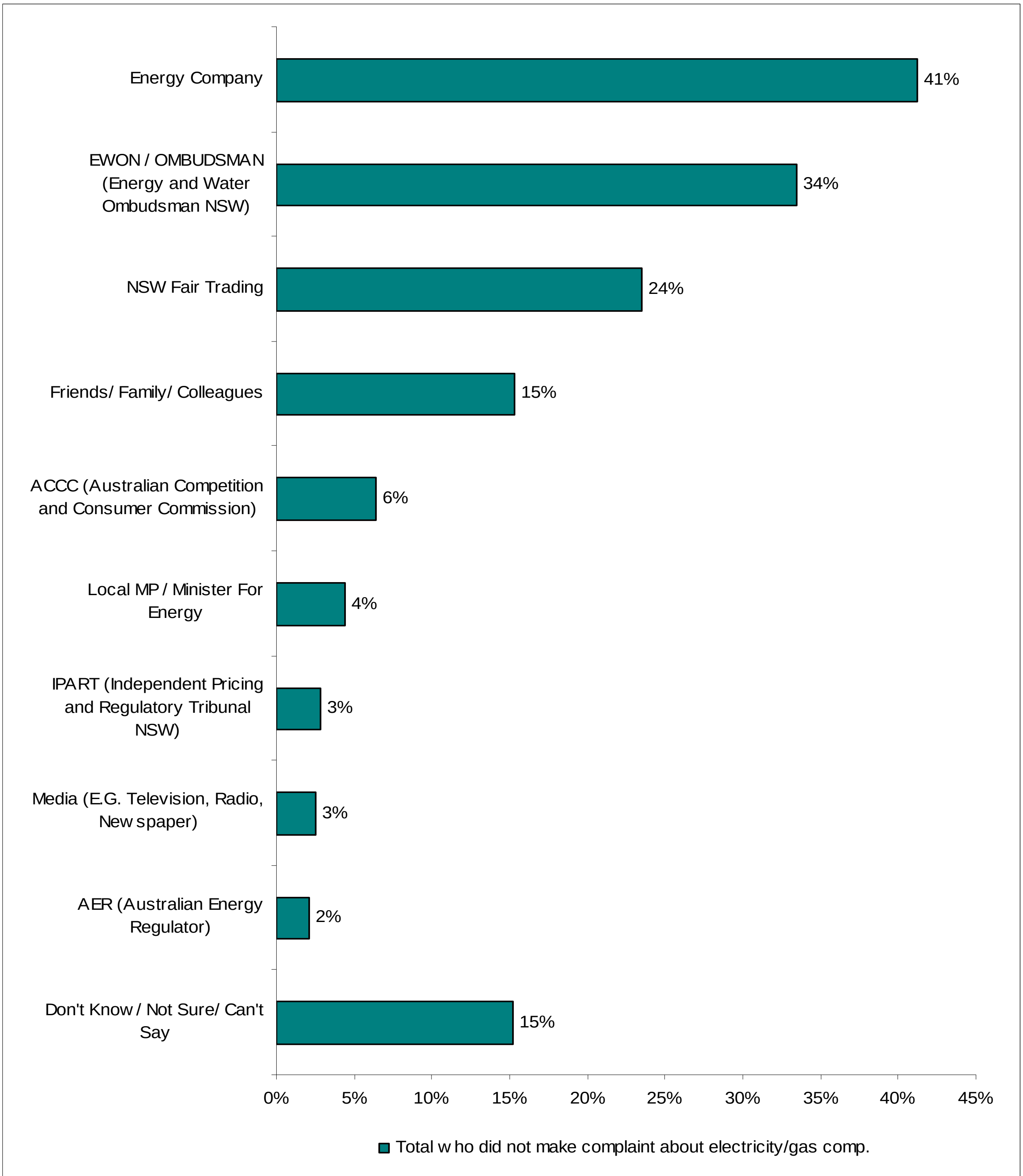


Q44. Who did you complain to?

Base: Total who made a complaint about an electricity or gas company (n=127)

*Organisations with zero mentions were AER (Australian Energy Regulator), AEMO (Australian Energy Market Operator), AEMC (Australian Energy Market Commission), DTIRIS (NSW Department of Trade & Investment, Regional Infrastructure & Services / NSW Energy Minister's Department)

Figure 42. Who Would you Complain to? (complete version)

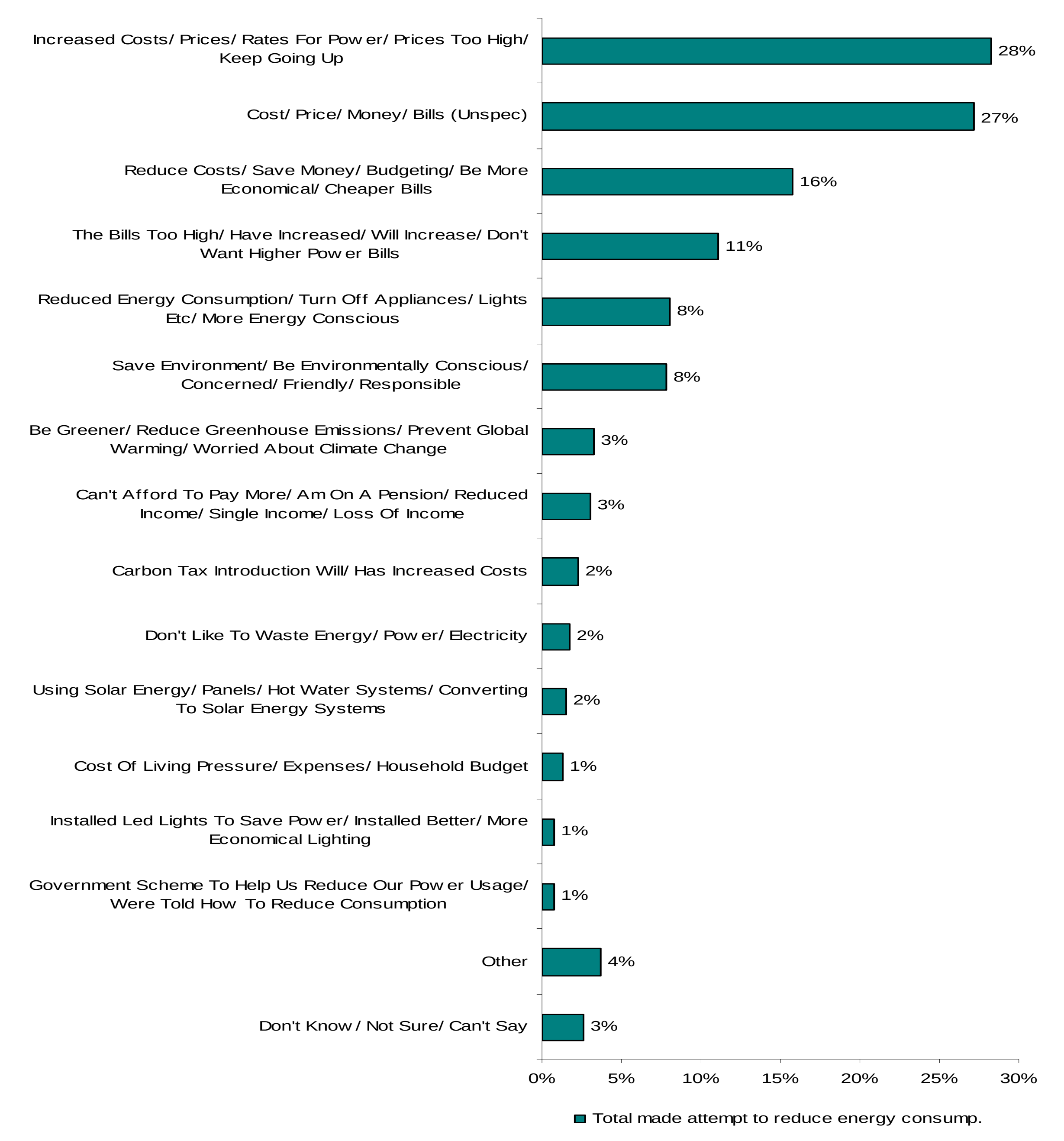


Q45. If you ever did need to complain about an electricity or gas company, who would you go to?

Base: Total who did not make a complaint about an electricity or gas company (n=863)

*Organisations with zero mention were: AEMO (Australian Energy Market Operator), AEMC (Australian Energy Market Commission), DTIRIS (NSW Department of Trade & Investment, Regional Infrastructure & Services / NSW Energy Minister's Department)

Figure 44. Main Factor Causing Energy Saving Behaviour (complete version)



Q51. What was the main factor that influenced your decision to attempt to reduce your energy consumption in the last 12 months?

Base: Total made attempt to reduce energy consumption in last 12 months (n=830)

9. SURVEY

Good [Morning/ Afternoon/ Evening]. My name is (SAY NAME) from Roy Morgan Research. May I please speak with [%IDN] the person who took part in a face-to-face survey with us? (if not available) or a person in the household who is the decision maker, or shares in the decision making, about the purchase of electricity or gas? We're not selling anything. We are conducting a survey about electricity and gas use in New South Wales.

IF NOT AVAILABLE: "When would be a good time to reach him/her?"

IF NECESSARY, MAKE AN APPOINTMENT.

IF RESPONDENT ASKS WHO THE STUDY IS BEING DONE FOR, SAY: "We're doing the study on behalf of the Australian Energy Market Commission."

NOTE TO INTERVIEWERS: IT IS IMPORTANT THAT ALL PARTICIPANTS HAVE A GOOD COMMAND OF SPOKEN ENGLISH. IF YOU FEEL A RESPONDENT IS STRUGGLING TO UNDERSTAND THE QUESTIONS IN THIS SCREENER, PLEASE TERMINATE THE INTERVIEW AFTER ANY QUESTION.

IF RESPONDENT HAS CONCERNS ABOUT PRIVACY/CONFIDENTIALITY ISSUES, SAY: "The information will be used for research purposes only. Your answers will be combined with 100's of other people in New South Wales. Your anonymity is assured. If you are concerned about privacy issues or the compliance of Roy Morgan Research with the Privacy Act, you can access our privacy policy on our website www.roymorganresearch.com.

IF NECESSARY: "You can go to the website www.privacy.gov.au for further information."

[Multiple] {Spread:20 }

QS1. We need to interview certain types of people for this study. Do you or does anyone at your home work for... READ OUT

1		A gas company
2		An advertising company
3		An Electricity company
4		In Energy Policy or Energy Regulation
5		In Market Research
6	Single	None of these

IF CODES 1-5 ON QS1, THANK AND CLOSE

Thanks. We need to speak with people who work in other industries.

ENDIF

CODES IN QS2 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

QS2. For this residence, what types of energy does your household use? READ OUT
HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

⇩⇧

1		Electricity
2		Piped Natural Gas (i.e. mains gas)
3		Bottled Gas
4		Solar
97	Fixed Openend	(DO NOT READ) OTHER (PLEASE SPECIFY)
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
99	Fixed Single	(DO NOT READ OUT) REFUSED

IF CODE 1 OR 2 NOT SELECTED ON QS2, SAY:

Thanks but we need to speak with people who use certain types of energy.

ENDIF

IF CODE 1 SELECTED AND NOT CODE 2 ON QS2

[Single]

QS2a. Are you able to connect to piped natural gas at your current residence? DO NOT READ

⇩⇧

1	YES
2	NO

3		DON'T KNOW

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single]

QE2. How much was your most recent electricity bill? Your best estimation of the cost is fine. DO NOT READ

1		LESS THAN $200 PER QUARTER (LESS THAN $67 PER MONTH)
2		$201 UP TO $300 PER QUARTER ($68 - $100 PER MONTH)
3		$301 UP TO $400 PER QUARTER ($101 - $133 PER MONTH)
4		$401UP TO $500 PER QUARTER ($134 - $167 PER MONTH)
5		$501 UP TO $600 PER QUARTER ($168 - $200 PER MONTH)
6		$601 UP TO $700 PER QUARTER ($201 - $233 PER MONTH)
7		$701 UP TO $800 PER QUARTER ($234 - $267 PER MONTH)
8		$801 UP TO $900 PER QUARTER ($268 - $300 PER MONTH)
9		$901 UP TO $1000 PER QUARTER ($301 - $333 PER MONTH)
10		MORE THAN $1000 PER QUARTER ($334 OR MORE PER MONTH)
98	Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
99	Single	(DO NOT READ OUT) REFUSED

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG3. How much was your most recent gas bill? Your best estimation of the cost is fine. DO NOT READ

1		LESS THAN $200 PER QUARTER (LESS THAN $67 PER MONTH)

2		$201 UP TO $300 PER QUARTER ($68 - $100 PER MONTH)
3		$301 UP TO $400 PER QUARTER ($101 - $133 PER MONTH)
4		$401UP TO $500 PER QUARTER ($134 - $167 PER MONTH)
5		$501 UP TO $600 PER QUARTER ($168 - $200 PER MONTH)
6		$601 UP TO $700 PER QUARTER ($201 - $233 PER MONTH)
7		$701 UP TO $800 PER QUARTER ($234 - $267 PER MONTH)
8		$801 UP TO $900 PER QUARTER ($268 - $300 PER MONTH)
9		$901 UP TO $1000 PER QUARTER ($301 - $333 PER MONTH)
10		MORE THAN $1000 PER QUARTER ($334 OR MORE PER MONTH)
98	Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
99	Single	(DO NOT READ OUT) REFUSED

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

CODES IN QE4 WILL BE RANDOMISED

[Single] {Random}

QE4. As far as you are aware, which of the following applies? READ OUT

INTERVIEWER NOTE: SOME PEOPLE MAY REFER TO THEIR "ELECTRICITY RETAILER/SUPPLIER" WE ARE TALKING HERE SIMPLY ABOUT WHO THEY BUY ELECTRICITY FROM.

⇩⇧

1		I can choose the company I purchase electricity from
2		I cannot choose the company I purchase electricity from
98	Fixed	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG4. As far as you are aware, which of the following applies? READ OUT

INTERVIEWER NOTE: SOME PEOPLE MAY REFER TO THEIR "GAS RETAILER/SUPPLIER". WE ARE TALKING HERE SIMPLY ABOUT WHO THEY BUY GAS FROM.

1		I can choose the company I purchase gas from
2		I cannot choose the company I purchase gas from
98	Fixed	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single]

QE5. Which company do you buy electricity from for your current dwelling in New South Wales?

INTERVIEWERS NOTE: IF THE RESPONDENT IS CONFUSED AS TO WHO THEIR CURRENT COMPANY IS, THEY SHOULD SELECT THE ONE THEY HAVE MOVED TO, OR ARE MOVING TO

DO NOT READ OUT

1	ACTEWAGL
2	AGL
3	AURORA
4	AUSTRALIAN POWER AND GAS (APG)
5	COUNTRY ENERGY [CUSTOMERS ACQUIRED BY ORIGIN ENERGY]
6	DIAMOND ENERGY
7	DODO POWER AND GAS
8	ENERGY AUSTRALIA [CUSTOMERS ACQUIRED BY TRUENERGY, WHO HAS NOW REBRANDED AS ENERGY AUSTRALIA]
9	INTEGRAL ENERGY [CUSTOMERS ACQUIRED BY ORIGIN ENERGY]
10	LUMO ENERGY
11	MOMENTUM ENERGY
12	ORIGIN ENERGY

13		POWERDIRECT
14		RED ENERGY
15		SANCTUARY ENERGY
16		SIMPLY ENERGY
17		TRUENERGY [TRUENERGY HAS REBRANDED ITSELF AS ENERGY AUSTRALIA]
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	I DO NOT BUY ENERGY FROM AN ENERGY COMPANY (E.G. LONG TERM RESIDENT OF TOURIST PARK)
99	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF NOT CODE 98 OR 99 ON QE5

ANSWER FROM QE5 WILL NOT APPEAR IN LIST FOR QE5A

[Multiple] {Spread:20 }

QE5a. Which other companies do you THINK you could buy electricity from for your current dwelling in New South Wales? Any others? DO NOT READ OUT

1	ACTEWAGL
2	AGL
3	AURORA
4	AUSTRALIAN POWER AND GAS (APG)
5	COUNTRY ENERGY [CUSTOMERS ACQUIRED BY ORIGIN ENERGY]
6	DIAMOND ENERGY
7	DODO POWER AND GAS
8	ENERGY AUSTRALIA [CUSTOMERS ACQUIRED BY TRUENERGY, WHO HAS NOW REBRANDED AS ENERGY AUSTRALIA]
9	INTEGRAL ENERGY [CUSTOMERS ACQUIRED BY ORIGIN ENERGY]
10	LUMO ENERGY
11	MOMENTUM ENERGY

12		ORIGIN ENERGY
13		POWERDIRECT
14		RED ENERGY
15		SANCTUARY ENERGY
16		SIMPLY ENERGY
17		TRUENERGY [TRUENERGY HAS REBRANDED ITSELF AS ENERGY AUSTRALIA]
97	Fixed Openend	OTHER (PLEASE SPECIFY)
99	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG5. Which company do you buy gas from for your current dwelling in New South Wales?

INTERVIEWERS NOTE: IF THE RESPONDENT IS CONFUSED AS TO WHO THEIR CURRENT COMPANY IS, THEY SHOULD SELECT THE ONE THEY HAVE MOVED TO, OR ARE MOVING TO

DO NOT READ OUT

1		ACTEWAGL
2		AGL
3		ENERGY AUSTRALIA [CUSTOMERS ACQUIRED BY TRUENERGY, WHO HAS NOW REBRANDED AS ENERGY AUSTRALIA]
4		COUNTRY ENERGY [CUSTOMERS ACQUIRED BY ORIGIN ENERGY]
5		ORIGIN ENERGY
6		SIMPLY ENERGY
7		TRUENERGY [TRUENERGY HAS REBRANDED ITSELF AS ENERGY AUSTRALIA]
97	Fixed	OTHER (PLEASE SPECIFY)

	Openend	
98	Fixed Single	I DO NOT BUY ENERGY FROM AN ENERGY COMPANY (E.G. LONG TERM RESIDENT OF TOURIST PARK)
99	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF NOT CODE 98 OR 99 ON QG5

ANSWER FROM QG5 WILL NOT APPEAR IN LIST FOR QG5A

[Multiple] {Spread:20 }

QG5a. Which other companies do you THINK you could buy gas from for your current dwelling in New South Wales? Any others? DO NOT READ OUT

⇩⇧

1		ACTEWAGL
2		AGL
3		ENERGY AUSTRALIA [CUSTOMERS ACQUIRED BY TRUENERGY, WHO HAS NOW REBRANDED AS ENERGY AUSTRALIA]
4		COUNTRY ENERGY [CUSTOMERS ACQUIRED BY ORIGIN ENERGY]
5		ORIGIN ENERGY
6		SIMPLY ENERGY
7		TRUENERGY [TRUENERGY HAS REBRANDED ITSELF AS ENERGY AUSTRALIA]
97	Fixed Openend	OTHER (PLEASE SPECIFY)
99	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single]

QE6. Have ANY electricity companies approached your household by any means and offered to sell you electricity? DO NOT READ OUT

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 ON QE6

[Quantity] {Min: 1, Max: 101, Default Value:101}

QE6a. How many times have you or others in your household been approached in the past 12 months?

[Single]

QE7. Thinking about the last electricity company who contacted you, how did they approach you? DO NOT READ OUT

1		DOOR TO DOOR SALES CONSULTANT
2		DIRECT MAIL
3		TELEPHONE SALES CONSULTANT
4		EMAIL
5		SOCIAL MEDIA (E.G. FACEBOOK OFFER/INVITATION, OR TWITTER OFFER/COMMENT)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

Think about the information given to you by an electricity company, on a scale of 1 to 5 where #/1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 is "disagree strongly", 4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/ , please rate your level of agreement with the following: READ OUT

[Single]

QE8A. The information was easy to understand. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE8B. The information made it easy to compare offers between different retailers. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE8C. There was sufficient information for me to make an informed choice about the offer that met my needs. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE8D. The information helped me to identify my energy needs. (READ OUT IF NECESSARY)

⇩⇧

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

ENDIF

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG6. Have ANY gas companies approached your household by any means and offered to sell you gas? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 ON QG6

[Quantity] {Min: 1, Max: 101, Default Value:101}

QG6a. How many times have you or others in your household been approached in the past 12 months?

[Single]

QG7. Thinking about the last gas company who contacted you, how did they approach you? DO NOT READ OUT

⇩⇧

1		DOOR TO DOOR SALES CONSULTANT
2		DIRECT MAIL
3		TELEPHONE SALES CONSULTANT
4		EMAIL
5		SOCIAL MEDIA (E.G. FACEBOOK OFFER/INVITATION, OR TWITTER OFFER/COMMENT)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

Think about the information given to you by a gas company, on a scale of 1 to 5 where #/1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 is "disagree strongly",4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/ , please rate your level of agreement with the following: READ OUT

[Single]

QG8A. The information was easy to understand. (READ OUT IF NECESSARY)

⇩⇧

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG8B. The information made it easy to compare offers between different retailers. (READ OUT IF NECESSARY)

⇩⇧

1	AGREE STRONGLY
2	AGREE SOMEWHAT

3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG8C. There was sufficient information for me to make an informed choice about the offer that met my needs. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG8D. The information helped me to identify my energy needs. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

ENDIF

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single]

QE9. Have you approached an electricity company, including your existing electricity company, to ask about buying electricity from them? DO NOT READ OUT

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF YES IN QE9 (CODE 1 IN QE9)

CODES IN QE10 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

QE10. Why did you approach the electricity company (to ask about buying electricity from them)? DO NOT READ OUT

1		YOU ARE PLANNING TO MOVE HOUSE
2		YOU HAD PURCHASED A NEW ENERGY APPLIANCE FOR YOUR RESIDENCE THAT REQUIRED A DIFFERENT ENERGY SOURCE (SUCH AS A NEW GAS STOVE/HEATER FOR A PREVIOUSLY 'ALL ELECTRIC' RESIDENCE)
3		YOU WERE INTERESTED IN COMPARING RATES/OFFERS/DEALS
4		YOU WERE INTERESTED IN FINDING OUT ABOUT A 'SMART' OR 'TIME OF USE' METER FOR YOUR RESIDENCE
5		YOU WERE INTERESTED IN NEGOTIATING A BETTER ENERGY DEAL COMPARED TO YOUR EXISTING DEAL
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Multiple] {Spread:20 }

QE11. Thinking about the last electricity company that you approached, how did you do this? DO NOT READ OUT

⇩⇧

1		TELEPHONE
2		VISITED A RETAIL OUTLET
3		INTERNET/ WEBSITE ENQUIRY / SENT AN EMAIL
4		SOCIAL MEDIA (E.G. FACEBOOK, TWITTER)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 1 IN QE6 OR QE9

CODES IN QE12 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

QE12. Did any of the electricity companies that you approached, or that approached you... READ OUT

⇩⇧

1		Refuse to sell you electricity
2		Offer to sell you electricity and gas as a combined offer
3		Offer to sell you electricity
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE12

[Multiple] {Spread:20 }

QE12a. Why did the company refuse to sell you electricity?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF HAS GAS (CODE 2 ON QS2) OR COULD CONNECT TO GAS (CODE 1 ON QS2A)

[Single]

QE13. Have you approached any electricity company, including your existing electricity company, to ask about buying gas from them? DO NOT READ

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG9. Have you approached any gas company including your existing gas company, to ask about buying gas from them? DO NOT READ

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QG9

CODES 1-5 IN QG10 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

QG10. Why did you approach the gas company (to ask about buying gas from them)?
DO NOT READ OUT

⇩⇧

1		YOU ARE PLANNING TO MOVE HOUSE
2		YOU WERE INTERESTED IN NEGOTIATING A BETTER ENERGY DEAL COMPARED TO YOUR EXISTING DEAL
3		YOU WERE INTERESTED IN FINDING OUT ABOUT A 'SMART' OR 'TIME OF USE' METER FOR YOUR RESIDENCE
4		YOU HAD PURCHASED A NEW ENERGY APPLIANCE FOR YOUR RESIDENCE THAT REQUIRED A DIFFERENT ENERGY SOURCE (SUCH AS A NEW GAS STOVE/HEATER FOR A PREVIOUSLY 'ALL ELECTRIC' RESIDENCE)
5		YOU WERE INTERESTED IN COMPARING RATES/OFFERS/DEALS
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Multiple] {Spread:20 }

QG11. Thinking about the last gas company that you approached, how did you do this?
DO NOT READ OUT

⇩⇧

1		TELEPHONE
2		VISITED A RETAIL OUTLET
3		INTERNET/ WEBSITE ENQUIRY / SENT AN EMAIL
4		SOCIAL MEDIA (E.G. FACEBOOK, TWITTER)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 1 IN QG6 OR QG9

CODES IN QG12 WILL BE RANDOM

[Multiple] {Spread:20 Random}

QG12. Did any of the gas companies that you approached, or that approached you... READ OUT

⇩⇧

1		Refuse to sell you gas
2		Offer to sell you gas
3		Offer to sell you electricity and gas as a combined offer
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QG12

[Multiple] {Spread:20 }

QG12a. Why did the company refuse to sell you gas?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG13. Have you approached any gas company including your existing gas company, to ask about buying electricity from them? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single]

QE14. Have you switched electricity companies in New South Wales since January 2002? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE14 CONTINUE WITH QE14A-QE24:

[Single]

QE14a. How many times have you switched electricity companies in New South Wales since January 2002? DO NOT READ OUT

⇩⇧

1	ONE
2	TWO
3	THREE
4	FOUR
5	FIVE
6	MORE THAN FIVE TIMES

98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE15. The last time you switched your electricity company, how easy was the switching process?

READ OUT: #/Very easy, Somewhat easy, Neither easy nor difficult, Somewhat difficult, Very difficult/Very difficult, Somewhat difficult, Neither easy nor difficult, Somewhat easy, Very easy/

⇩⇧

1		VERY EASY
2		SOMEWHAT EASY
3		NEITHER EASY NOR DIFFICULT
4		SOMEWHAT DIFFICULT
5		VERY DIFFICULT
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE16. Would you say the switching process...? READ OUT

⇩⇧

1		Took more time than expected
2		Took less time than expected
3		Took about as long as expected
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE18. Did the switching process go as smoothly as expected? DO NOT READ OUT

⇩⇧

1		YES
2		NO
98		DON'T KNOW/NOT SURE/CAN'T SAY

IF NO IN QE18 (CODE 2 IN QE18)

[Multiple] {Spread:20 }

QE19. Why did the switching process not go smoothly?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

[Single]

QE20. The last time you switched your electricity company, what was the one most important reason for your decision? DO NOT READ OUT

⇩⇧

1		I WAS OFFERED A MONETARY REBATE / MONETARY CREDIT/ FINANCIAL INCENTIVE TO SWITCH
2		I WANTED TO BE WITH THE SAME COMPANY FOR ELECTRICITY AND GAS
3		I WANTED TO TAKE ADVANTAGE OF SERVICE BUNDLING (FOR EXAMPLE, GETTING ELECTRICITY AND TV SERVICES FROM THE SAME COMPANY)
4		I WAS UNHAPPY WITH MY FORMER ELECTRICITY COMPANY
5		I WANTED TO GET THE SALESPERSON TO LEAVE ME ALONE
6		I WAS OFFERED A GREEN ENERGY PRODUCT
7		I WAS OFFERED A BETTER RATE ON THE ELECTRICITY / A BETTER PLAN / CAN NOW PAY LESS FOR ELECTRICITY
8		I WAS OFFERED A FREE GIFT (OR PRIZE OR SUBSCRIPTION)
9		I TRUSTED THEM MORE
10		I WAS MOVING HOME
97	Fixed Openend	OTHER (PLEASE SPECIFY)

98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE22. Overall, how satisfied or dissatisfied are you with your new electricity company?

READ OUT: #/Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied, Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/

⇩⇧

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 4 OR 5 IN QE22

[Multiple] {Spread:20 }

QE23. Why are you dissatisfied with your new electricity company?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 OR 2 IN QE22

[Multiple] {Spread:20 }

QE24. Why are you satisfied with your new electricity company?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 IN QE14

[Multiple] {Spread:20 }

QE25. Why haven't you changed electricity company? DO NOT READ OUT

⇩⇧

1	CONCERN WITH THE SWITCHING PROCESS
2	COULD NOT BE BOTHERED / TOO MUCH EFFORT
3	THE INFORMATION IS TOO COMPLEX/THERE'S TOO MUCH TO SORT THROUGH/ TOO MUCH TO FIGURE OUT/TOO TECHNICAL
4	HAPPY WITH CURRENT ELECTRICITY COMPANY
5	HIGHER COSTS WITH OTHER ELECTRICITY COMPANIES
6	INADEQUATE POTENTIAL SAVINGS
7	INSUFFICIENT INFORMATION / NOT ENOUGH INFORMATION
8	I DIDN'T KNOW WHERE TO LOOK
9	I DIDN'T KNOW HOW TO SWITCH
10	COULDN'T UNDERSTAND THE INFORMATION/ INFORMATION IS VAGUE/ AMBIGUOUS/ POORLY WRITTEN/POORLY ORGANISED
11	LACK OF CONFIDENCE IN THE NEW ELECTRICITY COMPANY

12		WAITING FOR BETTER OFFER / WAITING FOR MORE CONVINCING OFFER
13		DIDN'T KNOW I COULD SWITCH
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 98 IN QE14

[Single]

QE26. Have you changed anything about the way your electricity company sells electricity to you?

INTERVIEWER NOTE: IF NECESSARY SAY: "THAT IS, HAVE YOU AGREED TO PAY DIFFERENT RATES, BUY A DIFFERENT TYPE OF ELECTRICITY PRODUCT (SUCH AS GREEN ENERGY), BEEN GIVEN A GIFT OR INCENTIVE TO AGREE TO A DIFFERENT TYPE OF SUPPLY ARRANGEMENT/ CONTRACT."

DO NOT READ OUT

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE26

[Single]

QE27. Thinking about the last time you changed your electricity supply arrangements with your electricity company, what was the one main reason for your decision? DO NOT READ OUT

1	I WAS OFFERED A MONETARY INCENTIVE / MONETARY CREDIT/ FINANCIAL INCENTIVE TO SWITCH
2	I WANTED TO BE WITH THE SAME COMPANY FOR

		ELECTRICITY AND GAS
3		I WANTED TO TAKE ADVANTAGE OF SERVICE BUNDLING (FOR EXAMPLE, GETTING ELECTRICITY AND TV SERVICES FROM THE SAME COMPANY)
4		I WAS UNHAPPY WITH MY FORMER ELECTRICITY COMPANY
5		I WANTED TO GET THE SALESPERSON TO LEAVE ME ALONE
6		I WAS OFFERED A GREEN ENERGY PRODUCT
7		I WAS OFFERED A BETTER RATE ON THE ELECTRICITY / A BETTER PLAN
8		I WAS OFFERED A FREE GIFT (OR PRIZE OR SUBSCRIPTION)
9		I TRUSTED THEM MORE
10		I HAD TO CHANGE (E.G. A NEW ENERGY METER WAS BEING INSTALLED)
11		I WAS MOVING HOME
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE29. How satisfied or dissatisfied are you with your new electricity supply arrangements?

READ OUT: #/Very satisfied , Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied, Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 4 OR 5 IN QE29

[Multiple] {Spread:20 }

QE30. Why were you dissatisfied?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 OR 2 IN QE29

[Multiple] {Spread:20 }

QE31. Why were you satisfied?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

[Single]

QE32. In the time since you last changed your electricity supply arrangements with your retailer, have you checked whether your current energy price (or tariff) is competitive relative to other energy offers? DO NOT READ OUT

⇩⇧

1	YES

2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE32 ASK QE33

[Single]

QE33. Was your current energy price (or tariff) competitive relative to other energy offers? DO NOT READ OUT

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 IN QE26

[Multiple] {Spread:20 }

QE34. Why haven't you made any changes to the way you buy electricity? DO NOT READ OUT

1	CONCERN WITH THE SWITCHING PROCESS
2	COULD NOT BE BOTHERED / TOO MUCH EFFORT
3	THE INFORMATION IS TOO COMPLEX/THERE'S TOO MUCH TO SORT THROUGH/ TOO MUCH TO FIGURE OUT/TOO TECHNICAL
4	HAPPY WITH CURRENT ELECTRICITY COMPANY
5	HIGHER COSTS WITH OTHER ELECTRICITY COMPANIES
6	INADEQUATE POTENTIAL SAVINGS
7	INSUFFICIENT INFORMATION / NOT ENOUGH INFORMATION

8		I DIDN'T KNOW WHERE TO LOOK
9		I DIDN'T KNOW HOW TO SWITCH
10		COULDN'T UNDERSTAND THE INFORMATION/ INFORMATION IS VAGUE/ AMBIGUOUS/ POORLY WRITTEN/POORLY ORGANISED
11		LACK OF CONFIDENCE IN THE NEW ELECTRICITY COMPANY
12		WAITING FOR BETTER OFFERS
13		DIDN'T KNOW I COULD SWITCH
14		I DIDN'T WANT TO BE LOCKED INTO AN ENERGY CONTRACT
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

CODES IN QG35 WILL BE RANDOMISED

[Single] {Random}

QE35. Which of following would be the one most effective incentive to encourage you to change electricity companies or change the way you buy electricity? READ OUT

1		Lower prices
2		Free gifts
3		Green energy
4		Having electricity and gas with one company
5		Early payment bonuses
6		Improved customer service
7	Fixed	(DO NOT READ) NOTHING WOULD BE AN EFFECTIVE INCENTIVE

ENDIF

ENDIF

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG14. Have you switched gas companies in New South Wales since January 2002? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QG14

[Single]

QG14a. How many times have you switched gas companies in New South Wales since January 2002? DO NOT READ OUT

⇩⇧

1		ONE
2		TWO
3		THREE
4		FOUR
5		FIVE
6		MORE THAN FIVE TIMES
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG15. The last time you switched your gas company, how easy was the switching process?

READ OUT: #/Very easy, Somewhat easy, Neither easy nor difficult, Somewhat difficult, Very difficult/Very difficult, Somewhat difficult, Neither easy nor difficult, Somewhat easy, Very easy/

⇩⇧

1		VERY EASY
2		SOMEWHAT EASY
3		NEITHER EASY NOR DIFFICULT
4		SOMEWHAT DIFFICULT
5		VERY DIFFICULT
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG16. Would you say the switching process...? READ OUT

1		Took more time than expected
2		Took less time than expected
3		Took about as long as expected
98	Fixed Single	(DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG18. Did the switching process go as smoothly as expected? DO NOT READ OUT

1		YES
2		NO
98		DON'T KNOW/NOT SURE/CAN'T SAY

IF NO IN QG18 (CODE 2 IN QG18) ASK:

[Multiple] {Spread:20 }

QG19. Why did the switching process not go smoothly?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

97	Fixed Openend	OTHER (PLEASE SPECIFY)

98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

[Single]

QG20. The last time you switched your gas company, what was the one most important reason for your decision? DO NOT READ OUT

⇩⇧

1		I WAS OFFERED A MONETARY REBATE / MONETARY CREDIT/ FINANCIAL INCENTIVE TO SWITCH
2		I WANTED TO BE WITH THE SAME COMPANY FOR ELECTRICITY AND GAS
3		I WANTED TO TAKE ADVANTAGE OF SERVICE BUNDLING (FOR EXAMPLE, GETTING ELECTRICITY AND TV SERVICES FROM THE SAME COMPANY)
4		I WAS UNHAPPY WITH MY FORMER ELECTRICITY COMPANY
5		I WANTED TO GET THE SALESPERSON TO LEAVE ME ALONE
6		I WAS OFFERED A GREEN ENERGY PRODUCT
7		I WAS OFFERED A BETTER RATE ON THE ELECTRICITY / A BETTER PLAN / CAN NOW PAY LESS FOR ELECTRICITY
8		I WAS OFFERED A FREE GIFT (OR PRIZE OR SUBSCRIPTION)
9		I TRUSTED THEM MORE
10		I WAS MOVING HOME
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG22.Overall, how satisfied or dissatisfied are you with your new gas company?

READ OUT: #/Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied, Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/

⇩⇧

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 4 OR 5 IN QG22

[Multiple] {Spread:20 }

QG23. Why are you dissatisfied with your new gas company?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Opend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 OR 2 IN QG22

[Multiple] {Spread:20 }

QG24. Why are you satisfied with your new gas company?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 IN QG14

[Multiple] {Spread:20 }

QG25.Why haven't you changed gas company? DO NOT READ OUT

1		CONCERN WITH THE SWITCHING PROCESS
2		COULD NOT BE BOTHERED / TOO MUCH EFFORT
3		THE INFORMATION IS TOO COMPLEX/THERE'S TOO MUCH TO SORT THROUGH/ TOO MUCH TO FIGURE OUT/TOO TECHNICAL
4		HAPPY WITH CURRENT ELECTRICITY COMPANY
5		HIGHER COSTS WITH OTHER ELECTRICITY COMPANIES
6		INADEQUATE POTENTIAL SAVINGS
7		INSUFFICIENT INFORMATION / NOT ENOUGH INFORMATION
8		I DIDN'T KNOW WHERE TO LOOK
9		I DIDN'T KNOW HOW TO SWITCH
10		COULDN'T UNDERSTAND THE INFORMATION/ INFORMATION IS VAGUE/ AMBIGUOUS/ POORLY WRITTEN/POORLY ORGANISED
11		LACK OF CONFIDENCE IN THE NEW ELECTRICITY COMPANY
12		WAITING FOR BETTER OFFER / WAITING FOR MORE CONVINCING OFFER
13		DIDN'T KNOW I COULD SWITCH
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 98 IN QG14

[Single]

QG26. Have you changed anything about the way your gas company sells gas to you?

INTERVIEWER NOTE: IF NECESSARY SAY: THAT IS, HAVE YOU AGREED TO PAY DIFFERENT RATES, BEEN GIVEN A GIFT OR INCENTIVE TO AGREE TO A DIFFERENT TYPE OF SUPPLY ARRANGEMENT/ CONTRACT.

DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QG26

[Single]

QG27. Thinking about the last time you changed your gas supply arrangements with your gas company, what was the one main reason for your decision? DO NOT READ OUT

⇩⇧

1	I WAS OFFERED A MONETARY INCENTIVE / MONETARY CREDIT/ FINANCIAL INCENTIVE TO SWITCH
2	I WANTED TO BE WITH THE SAME COMPANY FOR ELECTRICITY AND GAS
3	I WANTED TO TAKE ADVANTAGE OF SERVICE BUNDLING (FOR EXAMPLE, GETTING ELECTRICITY AND TV SERVICES FROM THE SAME COMPANY)
4	I WAS UNHAPPY WITH MY FORMER ELECTRICITY COMPANY
5	I WANTED TO GET THE SALESPERSON TO LEAVE ME ALONE
6	I WAS OFFERED A GREEN ENERGY PRODUCT
7	I WAS OFFERED A BETTER RATE ON THE ELECTRICITY / A BETTER PLAN
8	I WAS OFFERED A FREE GIFT (OR PRIZE OR SUBSCRIPTION)

9		I TRUSTED THEM MORE
10		I HAD TO CHANGE (E.G. A NEW ENERGY METER WAS BEING INSTALLED)
11		I WAS MOVING HOME
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG29. How satisfied or dissatisfied are you with your new gas supply arrangements?

READ OUT: #/Very satisfied , Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied, Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/

⇩⇧

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 4 OR 5 IN QG29

[Multiple] {Spread:20 }

QQG30. Why were you dissatisfied?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 OR 2 IN QG29

[Multiple] {Spread:20 }

QG31. Why were you satisfied?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

⇩⇧

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

[Single]

QG32. In the time since you last changed your gas supply arrangements with your retailer, have you checked whether your current energy price (or tariff) is competitive relative to other energy offers? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QG32 ASK QE33

[Single]

QG33. Was your current energy price (or tariff) competitive relative to other energy offers? DO NOT READ OUT

⇩⇧

1	YES
2	NO

98	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 IN QG26

[Multiple] {Spread:20 }

QG34. Why haven't you made any changes to the way you buy gas? DO NOT READ OUT

1		CONCERN WITH THE SWITCHING PROCESS
2		COULD NOT BE BOTHERED / TOO MUCH EFFORT
3		THE INFORMATION IS TOO COMPLEX/THERE'S TOO MUCH TO SORT THROUGH/ TOO MUCH TO FIGURE OUT/TOO TECHNICAL
4		HAPPY WITH CURRENT ELECTRICITY COMPANY
5		HIGHER COSTS WITH OTHER ELECTRICITY COMPANIES
6		INADEQUATE POTENTIAL SAVINGS
7		INSUFFICIENT INFORMATION / NOT ENOUGH INFORMATION
8		I DIDN'T KNOW WHERE TO LOOK
9		I DIDN'T KNOW HOW TO SWITCH
10		COULDN'T UNDERSTAND THE INFORMATION/ INFORMATION IS VAGUE/ AMBIGUOUS/ POORLY WRITTEN/POORLY ORGANISED
11		LACK OF CONFIDENCE IN THE NEW ELECTRICITY COMPANY
12		WAITING FOR BETTER OFFERS
13		DIDN'T KNOW I COULD SWITCH
14		I DIDN'T WANT TO BE LOCKED INTO AN ENERGY CONTRACT
97	Fixed Openend	OTHER (PLEASE SPECIFY)

98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

CODES IN QG35 WILL BE RANDOMISED

[Single] {Random}

QG35. Which of following would be the one most effective incentive to encourage you to change gas companies or change the way you buy gas? READ OUT

⇩⇧

1		Lower prices
2		Free gifts
3		Green energy
4		Having electricity and gas with one company
5		Early payment bonuses
6		Improved customer service
7	Fixed	(DO NOT READ) NOTHING WOULD BE AN EFFECTIVE INCENTIVE

ENDIF

ENDIF

ENDIF

ASK EVERYONE

[Single]

Q36. Have you, at any stage, entered into an energy contract and used the cooling off period to cancel the contract? DO NOT READ OUT

⇩⇧

1	YES
2	NO
3	NOT HEARD OF A COOLING OFF PERIOD

98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single]

QE37. In the next 12 months, how likely or unlikely is it that you will change your electricity supply arrangements with your current electricity company? READ OUT: #/Very likely, Somewhat likely, Neither unlikely nor likely, Somewhat unlikely, Very unlikely/Very unlikely, Somewhat unlikely, Neither unlikely nor likely, Somewhat likely, Very likely/

⇩⇧

1		VERY LIKELY
2		SOMEWHAT LIKELY
3		NEITHER UNLIKELY NOR LIKELY
4		SOMEWHAT UNLIKELY
5		VERY UNLIKELY
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE38. Have you looked for any information in the last 12 months to assist you in making a decision about changing your electricity supply arrangements with an electricity supplier, whether you have taken out a contract or not? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE38

[Multiple] {Spread:20 }

QE39. What were the sources of the information? DO NOT READ OUT

⇩⇧

1	NEWSPAPER ADVERTISEMENTS

2		RADIO ADS
3		MAGAZINE ADS
4		OUTDOOR ADS (BUS SHELTERS, BILLBOARDS, ETC.)
5		IPART (INDEPENDENT REGULATORY AND PRICING TRIBUNAL NSW)
6		FRIENDS/FAMILY/WORK COLLEAGUES
7		INTERNET SEARCHES (E.G. GOOGLE/YAHOO, ENERGY COMPANY WEBSITES, OMBUDSMAN WEBSITES)
8		INTERNET PRICE COMPARATORS (E.G. MYENERGYOFFERS, ENERGYMADEEASY)
9		INTERNET ADS (E.G. WEBSITE BANNER ADVERTISEMENTS / SPECIAL OFFERS)
10		NEWSPAPERS
11		RADIO
12		REPRESENTATIVE OF THE ELECTRICITY [GAS] COMPANY
13		THE ELECTRICITY [GAS] COMPANY
14		TELEVISION
15		SOCIAL MEDIA (E.G. FACEBOOK, TWITTER)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

Think about the information you obtained, , on a scale of 1 to 5 where #/1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 is "disagree strongly",4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/ , please rate your level of agreement with the following: READ OUT

[Single]

QE40A. The information was easy to obtain. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY

6 DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE40B. The information was easy to understand. (READ OUT IF NECESSARY)

1 AGREE STRONGLY

2 AGREE SOMEWHAT

3 NEITHER AGREE NOR DISAGREE

4 DISAGREE SOMEWHAT

5 DISAGREE STRONGLY

6 DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE40C. The information made it easy to compare offers. (READ OUT IF NECESSARY)

1 AGREE STRONGLY

2 AGREE SOMEWHAT

3 NEITHER AGREE NOR DISAGREE

4 DISAGREE SOMEWHAT

5 DISAGREE STRONGLY

6 DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE40D. There was sufficient information for me to make an informed choice about the offer that met my needs. (READ OUT IF NECESSARY)

1 AGREE STRONGLY

2 AGREE SOMEWHAT

3 NEITHER AGREE NOR DISAGREE

4 DISAGREE SOMEWHAT

5 DISAGREE STRONGLY

6	DON'T KNOW NOT SURE CAN'T SAY

ENDIF

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

[Single]

QG37. In the next 12 months, how likely or unlikely is it that you will change your gas supply arrangements with your current gas company?"

READ OUT: #/Very likely, Somewhat likely, Neither unlikely nor likely, Somewhat unlikely, Very unlikely/Very unlikely, Somewhat unlikely, Neither unlikely nor likely, Somewhat likely, Very likely/

⇩⇧

1		VERY LIKELY
2		SOMEWHAT LIKELY
3		NEITHER UNLIKELY NOR LIKELY
4		SOMEWHAT UNLIKELY
5		VERY UNLIKELY
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG38. Have you looked for any information in the last 12 months to assist you in making a decision about changing your gas supply arrangements with a gas supplier, whether you have taken out a contract or not? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE38

[Multiple] {Spread:20 }

QG39. What were the sources of the information? DO NOT READ OUT

⇩⇧

1		NEWSPAPER ADVERTISEMENTS
2		RADIO ADS
3		MAGAZINE ADS
4		OUTDOOR ADS (BUS SHELTERS, BILLBOARDS, ETC.)
5		IPART (INDEPENDENT REGULATORY AND PRICING TRIBUNAL NSW)
6		FRIENDS/FAMILY/WORK COLLEAGUES
7		INTERNET SEARCHES (E.G. GOOGLE/YAHOO, ENERGY COMPANY WEBSITES, OMBUDSMAN WEBSITES)
8		INTERNET PRICE COMPARATORS (E.G. MYENERGYOFFERS, ENERGYMADEEASY)
9		INTERNET ADS (E.G. WEBSITE BANNER ADVERTISEMENTS / SPECIAL OFFERS)
10		NEWSPAPERS
11		RADIO
12		REPRESENTATIVE OF THE ELECTRICITY [GAS] COMPANY
13		THE ELECTRICITY [GAS] COMPANY
14		TELEVISION
15		SOCIAL MEDIA (E.G. FACEBOOK, TWITTER)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

Think about the information you obtained, , on a scale of 1 to 5 where #/1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 is "disagree strongly",4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/ , please rate your level of agreement with the following: READ OUT

[Single]

QG40A. The information was easy to obtain. (READ OUT IF NECESSARY)

⇩⇧

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG40B. The information was easy to understand. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG40C. The information made it easy to compare offers. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG40D. There was sufficient information for me to make an informed choice about the offer that met my needs. (READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

ENDIF

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Multiple] {Spread:20 }

QE42. Have you experienced any of the following? READ OUT

⇩⇧

1	The actual price you were charged did not match the prices you were quoted by the electricity company
2	You entered into a contract in order to get more information
3	You felt pressured into signing a contract with an electricity company
4	You were told things about the terms and conditions of the contract that did not prove to be true
5	You were transferred to another electricity company without your explicit consent
6	You were unable to terminate your electricity contract during the cooling off period
7	You entered into a contract simply to get the person to leave your house and/ or hang up the phone
8	(DO NOT READ OUT) NONE OF THESE

ENDIF

ASK ALL

[Single]

Q43. Have you ever made a complaint about an electricity or gas company? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE43

[Multiple] {Spread:20 }

Q44. Who did you complain to? DO NOT READ OUT

⇩⇧

1		EWON / OMBUDSMAN (ENERGY AND WATER OMBUDSMAN NSW)
2		IPART (INDEPENDENT PRICING AND REGULATORY TRIBUNAL NSW)
3		AER (AUSTRALIAN ENERGY REGULATOR)
4		AEMO (AUSTRALIAN ENERGY MARKET OPERATOR)
5		AEMC (AUSTRALIAN ENERGY MARKET COMMISSION)
6		ACCC (AUSTRALIAN COMPETITION AND CONSUMER COMMISSION)
7		DTIRIS (NSW DEPARTMENT OF TRADE & INVESTMENT, REGIONAL INFRASTRUCTURE & SERVICES / NSW ENERGY MINISTER'S DEPARTMENT)
8		LOCAL MP / MINISTER FOR ENERGY
9		NSW FAIR TRADING
10		THE ENERGY (ELECTRICITY OR GAS) COMPANY
11		MEDIA (E.G. TELEVISION, RADIO, NEWSPAPER)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Multiple] {Spread:20 }

Q45. If you ever did need to complain about an electricity or gas company, who would you go to? DO NOT READ OUT

⇩⇧

1		EWON / OMBUDSMAN (ENERGY AND WATER OMBUDSMAN NSW)
2		IPART (INDEPENDENT PRICING AND REGULATORY TRIBUNAL NSW)
3		AER (AUSTRALIAN ENERGY REGULATOR)
4		AEMO (AUSTRALIAN ENERGY MARKET OPERATOR)
5		AEMC (AUSTRALIAN ENERGY MARKET COMMISSION)
6		ACCC (AUSTRALIAN COMPETITION AND CONSUMER COMMISSION)
7		DTIRIS (NSW DEPARTMENT OF TRADE & INVESTMENT, REGIONAL INFRASTRUCTURE & SERVICES / NSW ENERGY MINISTER'S DEPARTMENT)
8		LOCAL MP / MINISTER FOR ENERGY
9		NSW FAIR TRADING
10		THE ENERGY (ELECTRICITY OR GAS) COMPANY
11		MEDIA (E.G. TELEVISION, RADIO, NEWSPAPER)
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 SELECTED ON QS2 (ELECTRICITY USER)

[Single] {Random}

QE46. Would you say... READ OUT

⇩⇧

1		There is a greater variety of offers available from electricity companies compared to a year ago
2		There is a smaller variety of offers available from electricity companies compared to a year ago
3	Fixed	The variety of offers available from electricity companies compared to a year ago is about the same
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE47. Have you contacted your electricity company in the past 12 months? DO NOT READ

OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QE47

When you contacted your electricity company in the past 12 months, how satisfied were you with the following? Please rate on a scale of 1 to 5, #/Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied, Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/ READ OUT

[Single]

QE48A. The timeliness of the response. (READ OUT IF NECESSARY)

⇩⇧

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
6	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QE48B. The assistance provided. (READ OUT IF NECESSARY)

⇩⇧

1	VERY SATISFIED
2	SOMEWHAT SATISFIED
3	NEITHER SATISFIED NOR DISSATISFIED
4	SOMEWHAT DISSATISFIED
5	VERY DISSATISFIED

6	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

On a scale of 1 to 5 where #/1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 is "disagree strongly",4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/ , please rate your level of agreement with the following: READ OUT

[Single]

QE49A. I would go to my electricity company for advice on purchasing a new energy appliance.

(READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE49B. I would go to my electricity company for advice on improving my energy efficiency and decreasing my energy use.

(READ OUT IF NECESSARY)

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

[Single]

QE49C. I would go to my electricity company for advice on feed in tariffs.

INTERVIEWER NOTE: A FEED-IN TARIFF IS THE PREMIUM PAID BY AN ENERGY COMPANY TO ITS CONSUMERS FOR ANY EXCESS ELECTRICITY GENERATED BY THEIR SOLAR, WIND, OR ALTERNATIVE ENERGY SYSTEM. FEED-IN TARIFFS ARE USED BY GOVERNMENTS AS AN INCENTIVE FOR CONSUMERS TO ADOPT NEWER, CLEANER, RENEWABLE ENERGY SOURCES.

(READ OUT IF NECESSARY)

⇩⇧

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT
5	DISAGREE STRONGLY
6	DON'T KNOW NOT SURE CAN'T SAY

ENDIF

IF CODE 2 SELECTED ON QS2 (GAS USER)

CODES IN QG42 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

QG42. Have you experienced any of the following? READ OUT

⇩⇧

1	The actual price you were charged did not match the prices you were quoted by the gas company
2	You entered into a contract in order to get more information
3	You felt pressured into signing a contract with an gas company
4	You were told things about the terms and conditions of the contract that did not prove to be true
5	You were transferred to another gas company without your explicit consent
6	You were unable to terminate your gas contract during the cooling off period
7	You entered into a contract simply to get the person to leave your house and/ or hang up the phone

8	Fixed Single	(DO NOT READ OUT) NONE OF THESE

CODES 1-2 IN QG46 WILL BE RANDOMISED

[Single] {Random}

QG46. Would you say... READ OUT

⇩⇧

1		There is a greater variety of offers available from gas companies compared to a year ago
2		There is a smaller variety of offers available from gas companies compared to a year ago
3	Fixed	The variety of offers available from gas companies compared to a year ago is about the same
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG47. Have you contacted your gas company in the past 12 months? DO NOT READ OUT

⇩⇧

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN QG47

When you contacted your gas company in the past 12 months, how satisfied were you with the following? Please rate on a scale of 1 to 5, #/Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied, Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/ READ OUT

[Single]

QG48A. The timeliness of the response. (READ OUT IF NECESSARY)

⇩⇧

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
6	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QG48B. The assistance provided. (READ OUT IF NECESSARY)

⇩⇧

1		VERY SATISFIED
2		SOMEWHAT SATISFIED
3		NEITHER SATISFIED NOR DISSATISFIED
4		SOMEWHAT DISSATISFIED
5		VERY DISSATISFIED
6	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

On a scale of 1 to 5 where #/1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 is "disagree strongly",4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/ , please rate your level of agreement with the following: READ OUT

[Single]

QG49A. I would go to my gas company for advice on purchasing a new energy appliance. (READ OUT IF NECESSARY)

⇩⇧

1	AGREE STRONGLY
2	AGREE SOMEWHAT
3	NEITHER AGREE NOR DISAGREE
4	DISAGREE SOMEWHAT

5 DISAGREE STRONGLY

6 DON'T KNOW NOT SURE CAN'T SAY

[Single]

QG49B. I would go to my gas company for advice on improving my energy efficiency and decreasing my energy use. (READ OUT IF NECESSARY)

1 AGREE STRONGLY

2 AGREE SOMEWHAT

3 NEITHER AGREE NOR DISAGREE

4 DISAGREE SOMEWHAT

5 DISAGREE STRONGLY

6 DON'T KNOW NOT SURE CAN'T SAY

ENDIF

ASK EVERYONE

[Single]

Q49. In terms of the actual unit price (or tariff) at which you consume energy, do know you whether this price is a regulated price or a market price? DO NOT READ OUT

INTERVIEWERS NOTE - IF THE RESPONDENT DOES NOT KNOW WHAT A "REGULATED PRICE" PRICE MEANS, CLARIFY THAT IT IS THE PRICE THAT IS SET BY THE NSW REGULATOR, IPART.

1 YES

2 NO

98 DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q50. Have you made any attempt to reduce your energy consumption in the last 12 months? DO NOT READ OUT

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 ON Q50

[Multiple] {Spread:20 }

Q51. What was the main factor that influenced your decision to attempt to reduce your energy consumption in the last 12 months?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW
DO NOT READ OUT

97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

[Single]

Q52. Are you aware of 'time of use' pricing - that is, an electricity supply arrangement whereby the price charged by an electricity company varies throughout the day, with the price of electricity being highest in the peak period? DO NOT READ OUT

1	YES
2	NO
98	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q53. Does the electricity supply arrangement that you currently have in place with your electricity company allow for 'time of use' pricing? DO NOT READ OUT

1	YES
2	NO

98		DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q55. Are you aware of the availability of any assistance to help in comparing energy prices between retailers and making energy decisions, such as price comparator websites or other energy brokers? DO NOT READ OUT

1		YES
2		NO
98		DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q56. Are you aware of the availability of the NSW price comparator website, My-Energy-Offers, which is independent, free and may help you to compare energy prices between retailers? DO NOT READ OUT

1		YES
2		NO
98		DON'T KNOW/NOT SURE/CAN'T SAY

Now, I'd like to ask you a few questions just for classification purposes.

[Single]

QX1. Which of the following broad categories best describes your household situation? READ OUT

1		Single, live on my own
2		Single, live in a shared household
3		Live with partner/spouse without dependent children
4		Single adult, with dependent child or children
5		Two adults with dependent child or children
6		Two or more adults with dependent child or children
99	Fixed Single	(DO NOT READ OUT) REFUSED

[Single]

QX2. Do you currently receive an energy concession or rebate on your electricity bill? DO NOT READ OUT

1		YES
2		NO
98		DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QX3. How many people live in your household? DO NOT READ OUT

1		ONE
2		TWO
3		THREE
4		FOUR
5		FIVE
6		SIX
7		SEVEN
8		EIGHT
9		NINE
10		TEN
11		MORE THAN TEN
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

QX4. Do you...? READ OUT

1		Own your home /pay a mortgage
2		Pay rent
97	Fixed Openend	OTHER (PLEASE SPECIFY)
98	Fixed	DON'T KNOW/NOT SURE/CAN'T SAY

Single

[Single]

QX5. Can you please tell me your age? DO NOT READ OUT

1		18 TO 24
2		25 TO 30
3		31 TO 39
4		40 TO 54
5		55 TO 64
6		65+
99	Fixed Single	REFUSED

[Single]

QX6. What is your highest level of education? DO NOT READ OUT

1		PRIMARY SCHOOL
2		HIGH SCHOOL
3		TERTIARY
4		POSTGRADUATE
97	Fixed Openend	OTHER (PLEASE SPECIFY)
99	Fixed Single	REFUSED

[Single]

QX7. Which of the following best describe your Gross Annual Household Income? READ OUT

1		Under $15,000
2		$15,001 to 25,000
3		$25,001 to 35,000
4		$35,001 to 50,000

5		$50,001 to 75,000
6		$75,001 to 100,000
7		$100,001 to $150,000
8		$150,001 to $200,000
9		More than $200,000
98	Fixed Single	DON'T KNOW/NOT SURE/CAN'T SAY
99	Fixed Single	REFUSED

[Quantity] {Min: 800, Max: 9999, Default Value:9999}

QX8. Can I please have your postcode?

INTERVIEWERS NOTE - IF THE RESPONDENT IS INITIALLY RELUCTANT TO PROVIDE THEIR POSTCODE FOR PRIVACY REASONS, PLEASE INFORM THEM THAT THE POSTCODE IS IMPORTANT TO OUR SURVEY AS ENERGY PRICES AND PRODUCTS MAY VARY BETWEEN LOCATIONS/NETWORKS AND WE WOULD LIKE TO UNDERSTAND CONSUMERS' EXPERIENCES IN DIFFERENT LOCATIONS/NETWORKS.

That's the final question. Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you have provided will be used only for research purposes. We are conducting this survey on behalf of the Australian Energy Market Commission. If you would like any more information about this project or Roy Morgan Research, you can phone us on 1800 337 332

[Single]

QSEX. RECORD SEX OF RESPONDENT

⇩⇧

1		MALE
2		FEMALE

10. APPENDIX 1: RE-ASSIGNMENT OF REGIONS

See Section 5. for more information.

Residential electricity	TOTAL	METRO (excluding Hunter and Illawara)*	METRO (including Hunter and Illawara)	EFFECT ON METRO	NON-METRO (including Hunter and Illawara)*	NON-METRO (excluding Hunter and Illawara)	EFFECT ON NON METRO	EFFECT OF CHANGING DEFINITION OF METRO/ NON-METRO
I can choose the company I purchase electricity from	90%	91%	92%	1%	86%	83%	-3%	metro vs. non-metro was significantly different both ways
Was approached by an electricity company selling electricity	68%	72%	71%	-1%	58%	54%	-4%	metro vs. non-metro was significantly different both ways
Last approach was a Door To Door Sales Consultant	72%	74%	73%	-1%	65%	63%	-2%	metro vs. non-metro was significantly different both ways
Switched electricity company since 2002	53%	52%	53%	1%	53%	53%	0%	metro vs. non-metro was not significantly different both ways
Changed arrangements with current provider	20%	21%	21%	0%	16%	15%	-1%	metro vs. non-metro was not significantly different both ways

Residential gas	TOTAL	METRO (excluding Hunter and Illawara)*	METRO (including Hunter and Illawara)	EFFECT ON METRO	NON-METRO (including Hunter and Illawara)*	NON-METRO (excluding Hunter and Illawara)	EFFECT ON NON METRO	EFFECT OF CHANGING DEFINITION OF METRO/ NON-METRO
I can choose the company I purchase gas from	86%	88%	90%	-2%	78%	60%	-18%	metro vs. non-metro was not significantly different both ways
Was approached by an gas company selling gas	32%	34%	35%	-1%	28%	16%	-12%	significantly different in original but significantly different when revised
Last approach was a Door To Door Sales Consultant	63%	61%	63%	-2%	69%	63%	-6%	metro vs. non-metro was not significantly different both ways
Switched gas company since 2002	33%	34%	34%	0%	30%	25%	-5%	metro vs. non-metro was not significantly different both ways
Changed arrangements with current provider	18%	16%	18%	-2%	28%	21%	-7%	metro vs. non-metro was not significantly different both ways