Australian Energy Market Commission (AEMC)

Consumer Research for 2015 Nationwide Review of Competition in Retail Energy Markets

Research Report

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Executive Summary

This report sets out the findings of market research conducted by Newgate Research in February 2015 on behalf of the Australian Energy Market Commission (AEMC). This research was designed to inform the 2015 Retail Competition Review.

The research was based on a quantitative survey (telephone and online) conducted with a sample of n=2,008 residential and n=500 small business consumers in all National Electricity Market (NEM) jurisdictions.

This Executive Summary seeks to highlight any statistically significant differences in results between the 2014 and 2015 research. It also highlights key differences between jurisdictions and between residential and small business consumers. As each jurisdiction is at various stages of the reform journey, comparisons must be considered in this light.

Key Findings

Overall awareness of being able to choose an energy company remained consistent among residents but increased significantly among small business consumers

At the overall NEM level awareness of being able to choose an energy company remained consistent among residential consumers, with 89% aware they could choose their electricity company (91% in 2014) and 91% aware they could choose their gas company (89% in 2014). At the individual jurisdiction level, results also remained consistent in 2015 with the exception of the ACT, which saw a significant increase in awareness (from 57% to 72%).

Among small business consumers there was a significant increase in awareness of being able to choose their electricity company across the NEM, from 88% in 2014 to 94% in 2015. This was driven by increases in Victoria (from 89% to 99%), South Australia (92% to 98%) and New South Wales (86% to 95%). Despite the increase in awareness, this did not translate to an increase in the proportion of small businesses who actively investigated offers or who had switched. Analysis of the barriers shows that the time and effort required remained the main reason that small business consumers did not investigate offers or switch their energy company or plan.

Overall confidence in being able to choose a suitable energy plan or offer for their household was fairly high among residential consumers in the NEM. More than half were quite or very confident (56% gave a rating of 7 or more out of 10), three in ten were fairly confident (29% gave a rating of 4 to 6) and just 12% were not that confident (12% gave a rating of 3 or less).

As was the case in 2014, consumer confidence and the perceived level of choice in each jurisdiction was highest in jurisdictions whose markets had been deregulated the longest and that had the highest number of energy companies operating there. Victorians had the highest awareness and confidence levels.

Switching rates across the NEM have declined

There was an overall decline in switching rates among residential consumers across the NEM with around half having switched their electricity company or plan in the past five years (51%) compared with around three fifths in 2014 (61%). Significant decreases in switching in the past five years were evident among residential consumers in Victoria (57% down from 67% in 2014), New South Wales (53% down from 61%) and southeast Queensland (47% down from 57%).

In 2015 we also began monitoring the proportion who switched energy company or plan in the 12 months to allow more granular analysis of switching rates in future. Across the NEM, just under a quarter of residential consumers (23%) and three in ten small business consumers (29%) changed their energy or plan in the past 12 months. Switching rates varied by jurisdiction and were highest in Victoria where awareness of choice and confidence in choosing a suitable energy plan were also high.

Results from the 2014 qualitative research suggested that direct approaches from energy companies, while not always appreciated, were very effective in increasing switching. In this context it is likely that this fall in switching rates is due to fewer approaches from energy companies in the past 12 months (39% down from 53% in 2014). Significant declines in approaches were evident in Victoria (53% down from 66%), South Australia (41% down from 58%), New South Wales (39% down from 49%) and southeast Queensland (28% down from 42%). The exception to this trend was the ACT where there was a significant increase in direct approaches from energy companies (from 10% in 2014 to 29% in 2015) although it is important to note that this increase did not translate to an increase in switching rates.

When it came to consumers actively investigating offers and options they could potentially switch to, results remained fairly consistent across the NEM (31% had done so in the past 12 months in both 2014 and 2015), with consumers in NSW (33% up from 27% in 2014) and ACT (19% up from 10%) significantly more likely to have done so in 2015.

Switching rates among small business consumers remained fairly consistent across the NEM as did direct approaches from energy companies to small businesses. There was however a significant decrease in the proportion of small business consumers who actively investigated offers in the past 12 months (from 43% in 2014 to 34% in 2015). This was largely driven by a decrease in Victoria (57% down to 36%).

Vulnerable customers

Across many of the jurisdictions there was a common theme evident among those on a special payment arrangement or having difficulty paying their energy bills as a result of financial hardship. This group of consumers were more likely to have actively investigated their options and offers and were also more interested in seeking out a better deal, but this did not result in higher switching rates. Analysis of the attitudes shows that vulnerable customers are significantly more concerned about hidden fees and charges, they are less trusting of energy companies who promise a better deal and tend to find it more confusing to compare the various options and offers available.

Price related factors are the biggest motivators for switching

When asked for the main reason for switching energy company or plan, the most common reasons related to cheaper prices, discounts and incentives. Consumers who had solar power were more likely to state reasons such as 'I got solar', 'I wanted a reliable supply' or 'I was offered a good solar rebate' compared to those who did not have solar, however, the number one reason stated by this group still related to cheaper prices, discounts and incentives.

When prompted with a list of factors that could potentially be considered during the switching process, the price per unit of energy, the total bill amount and the discounts offered were by far the most important factors for residential and business consumers. For residential consumers with solar panels the solar feed-in tariff was the highest level priority (44% rated the importance of this as 10 out of 10, and 34% rated 8 or 9 out of 10) and was considered as important as the price per unit of energy (41% of those with solar rated this as 10 out of 10 and 37% rated 8 or 9 out of 10), the discounts offered (39% rated this 10, 37% rated this 8 or 9) and the estimated total bill amount (39% rated this 10, 32% rated this 8 or 9).

A large majority of those who switched energy company or plan were happy with the outcome

Across all jurisdictions, those who had switched energy company or plan generally agreed that they were happy with their decision to switch and that they got what they expected when they switched.

Satisfaction with the outcomes was largely driven by the cheaper prices, discounts and incentives received. A smaller proportion of consumers were satisfied due to improved customer service levels.

Despite the high level of satisfaction with switching, the likelihood of consumers recommending switching to their family, friends or colleagues was fairly low.

Switching energy company or plan was not as easy as switching other services

Between half and two thirds of consumers who switched their energy company or plan found it fairly or very easy to compare the offers and options available. However, when compared with the ease of comparing offers for a range of other services such as insurance, banking or communications, electricity and gas were ranked lowest.

A lack of value proposition and being happy with their current arrangements were the biggest barriers to switching in most jurisdictions

Among those who had investigated their options in the past 12 months but had not switched, the main reason given related to lack of value proposition, with many saying things like they just didn't think they'd save much money or thinking that all retailers would be the same.

Among residential consumers who had not investigated their options nor switched, the main reasons given were they were happy with their current retailer or arrangements or they were too busy or could not be bothered. This was fairly consistent across all jurisdictions with the exception of Tasmania where the biggest barrier was a lack of options or alternatives to choose from.

Among small business consumers, the biggest barrier to investigating offers or switching was due to lack of time or could not be bothered.

Analysis of those with solar shows that even though they were significantly more likely to give reasons for not investigating options or switching such as 'I have solar arrangements' (12% vs. 0%), 'I didn't want to lose my feed-in tariff' (4% vs. 0% of those without solar) or 'I couldn't get an offer because I have solar (3% vs. 0%), the biggest barriers were still consistent with those who did not have solar i.e. being happy with their current retailer or arrangements (29% vs. 27%) or it was too much hassle, they could not be bothered or they didn't have the time (18% vs. 21%)

Intentions and attitudes towards investigating offers are fairly consistent across all jurisdictions

There remained a fair level of interest in seeking out a better deal in all jurisdictions. Overall, one in ten were currently looking (11% vs. 10% in 2014), four in ten were interested but not currently looking (39% vs. 48% in 2014), one in ten recently switched and did not intend to look for a while (10%, new response option added in 2015) and a third were simply not interested (32% vs. 38% in 2014).

Consumers were asked to indicate the extent to which they agreed or disagreed with a series of statements about investigating offers and switching. Across all jurisdictions the strongest agreement was with the statements *I would switch my energy company if I was not satisfied with my current company* and *I'm concerned if I switch there will be hidden fees and charges*.

In order to seriously consider switching residents wanted to see an average saving of $207 per year on their electricity bill and $162 on their annual gas bill. Small business consumers wanted to see a saving of $609 on their electricity bill and $249 off their gas bill in order to seriously consider switching. These results were fairly similar across the jurisdictions and there was a clear pattern in that the higher their previous energy bill was, the higher the saving needed to be before they would consider switching.

Satisfaction with the level of market choice remained consistent in most jurisdictions

At the total NEM level around half of consumers surveyed (56% of residents and 47% of small business) were somewhat or very satisfied with the level of market choice in their jurisdiction. These results were consistent with 2014 across most jurisdictions with the exception of NSW which saw a significant increase in satisfaction in 2015 (60% were somewhat or very satisfied compared to 48% in 2014).

As was the case in 2014, satisfaction with the level of market choice increased with the level of competition in each jurisdiction.

Satisfaction with energy companies remained fairly consistent in 2015, however value for money ratings varied

Satisfaction with current electricity and gas companies remained very consistent across all NEM jurisdictions. Among residential consumers ratings for value for money provided by electricity companies increased significantly in 2015 (54% rated a 7 or more compared to 50% in 2014) as did the value for money provided by gas companies (61% rated 7 or more in 2015 compared to 53% in 2014). By contrast, among small business consumers there was a significant decline in ratings for value for money provided by their electricity company (37% gave a rating of 7 or more in 2015 compared to 52% in 2014).

Internet based sources are the most useful and most preferred information sources across all jurisdictions

As was the case in 2014, internet based information sources were the most commonly used and the most preferred information sources for looking for information about different energy plans or offers. The internet was also deemed the most useful information source among those who had previously investigated their options or switched energy company or plan.

Of note, those who had used price comparison sites to investigate their offers or options were significantly more aware they could choose their electricity company (97% vs. 88% of those who had not used comparison sites) or electricity plan (88% vs. 77%). This group were also more confident they could find the right information to help choose an energy plan (64% gave a rating of 7 or more vs. 53%). Among residents who used a price comparator website to help with their decision to switch electricity or gas company the majority (63% of electricity consumers and 72% of gas consumers) thought this was the most useful information source.

Just over four in ten consumers who switched company or plan used a price fact sheet when they switched electricity (42% when prompted) or gas (47%) company or plan. A similar proportion of those who investigated their options but did not switch used a price fact sheet to compare different offers (51%).

Across the NEM, there were fair levels of confidence in being able to find the right information to help choose an energy plan (54%) were quite or very confident and gave a rating of 7 or more out of 10). Small business consumers were not as confident as residential consumers (45% were quite or very confident).

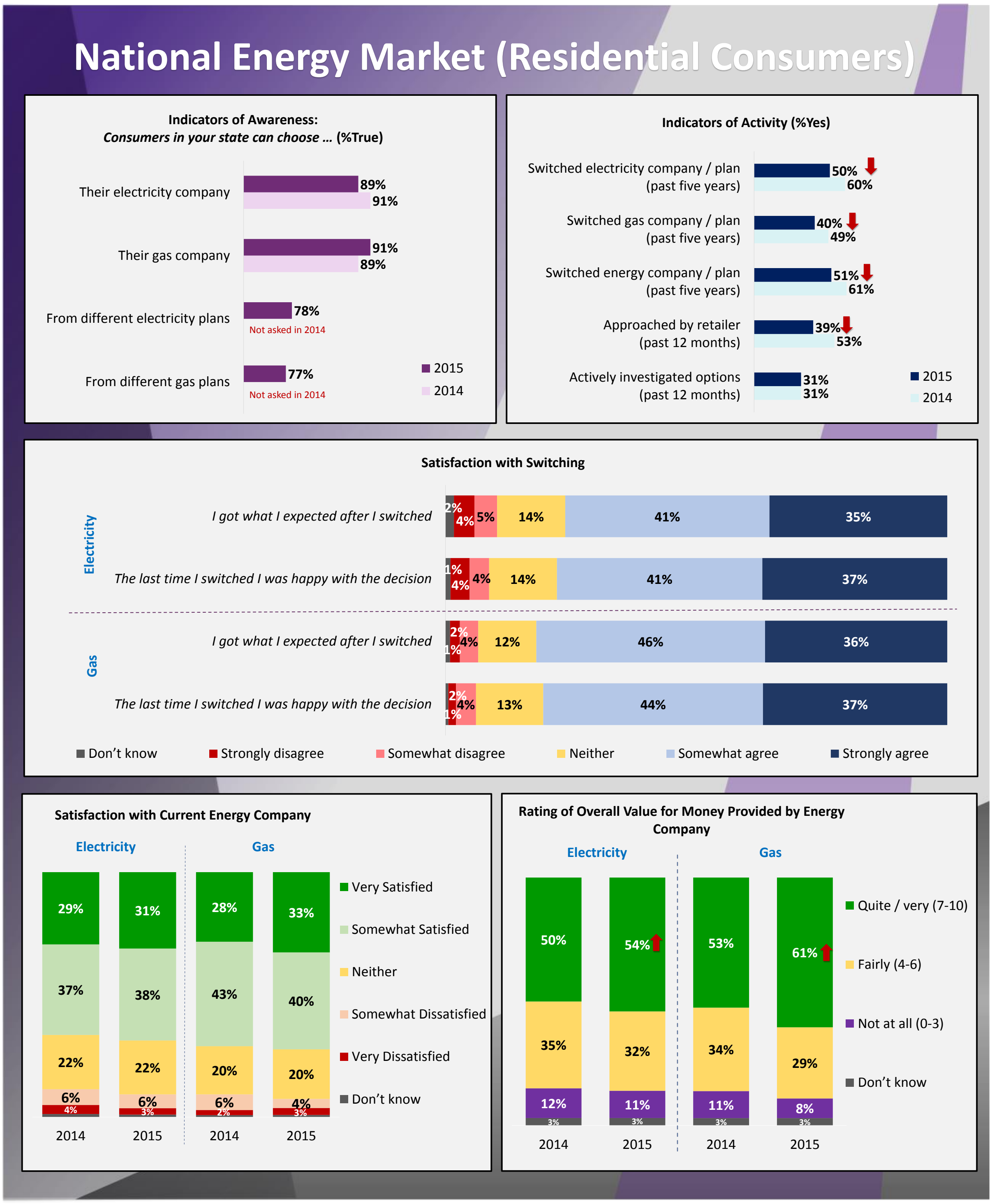
Awareness of comparison sites remained fairly low across all jurisdictions

The majority of consumers could not name any comparison websites that could help them choose a good energy deal. At fairly low levels, some consumers named iSelect, Compare the Market and Choosi.

When it came to the state-specific independent comparison sites, both prompted and unprompted recall among residents remained fairly consistent (18% were aware with prompting in 2015 vs. 17% in 2014 and 1% were aware without prompting compared to 2% in 2014). The only exceptions were in NSW where prompted awareness of the *energymadeeasy* site increased significantly (from 11% in 2014 to 16% in 2015) and in Victoria where prompted awareness of the comparator website My Power Planner also increased significantly (18% up from 8% in 2014).

Among small business consumers, unprompted recall of state-specific independent comparison sites remained low (2% in 2015 compared to 1% in 2014) and there was a significant decrease in prompted awareness (25% in 2015 compared to 13% in 2014).

Snapshot of Results



Introduction

Background

The Australian Energy Market Commission (AEMC) is an independent body responsible for making rules for the national energy markets and provides advice to the Council of Australian Government (COAG) Energy Council.

As part of the Australian Energy Market Agreement, the AEMC is responsible for conducting an annual assessment of the state of competition in electricity and natural gas retail markets across all jurisdictions within the national electricity market (NEM). This includes Queensland, New South Wales, the Australian Capital Territory, Victoria, South Australia and Tasmania. The review focuses on small energy customers.

The first NEM-wide review of competition in all markets was completed in August 2014 ('the 2014 review'). Newgate Research conducted the market research used to inform this review.

The AEMC has commissioned Newgate Research to conduct research with residential and small business electricity and natural gas customers within the NEM to help inform the 2015 review. In addition to the jurisdictions included in the 2014 research, this study also includes Tasmania which completed implementing full retail contestability for all small customers in July 2014.

Research Objectives

The key objective of this research was to assist the AEMC to further understand experiences of residential and small business consumers in the competitive energy markets and explore how these experiences have changed over time.

More specifically, the research aimed to measure and understand consumer's level of:

- Awareness of choice and confidence in choosing a suitable energy plan;
- Participation in the energy market, including drivers and barriers (both positive, negative and neutral) to switching energy companies or plans, and future switching intentions;
- Consumer satisfaction with the energy market, including perceptions of energy companies and levels of satisfaction with market choice; and
- Information sources and needs.

Following the 2014 Review, the AEMC sought feedback on the 2014 questionnaire from stakeholders such as IPART, The Australian Energy Regulator (AER), Consumer Action Law Centre (CALC), Energy Retailer's Association of Australia (ERAA) and the Queensland Government. The AEMC reviewed these in consultation with Newgate Research to see which could be incorporated into the 2015 study. In making decisions we focused on striking the right balance between maximising the usefulness of the survey results, ensuring the questionnaire length did not exceed 20 minutes and ensuring the survey remained as comparable as possible to that used in 2014. The main revisions involved capturing more granular switching rates (i.e. in the past 12 months), adding questions to better understand consumer confidence and the experiences of those who had switched as well as some additional profiling questions to better understand the experiences of vulnerable customers.

The questionnaire was finalised in close consultation with the AEMC. A copy of the quantitative questionnaire can be found in Appendix one and shows the additional questions that were included as well as questions where the wording changed.

Methodology

A quantitative research survey was conducted with n=2,008 residential and n=500 small business consumers across six NEM jurisdictions as follows. The table below also shows the margin of error (MOE at 95% confidence level) associated with each of the sample sizes.

Jurisdiction	TOTAL		Residential		Business	
	n	MOE (+/-)	n	MOE (+/-)	n	MOE (+/-)
Victoria	**503**	**4%**	403	5%	100	10%
New South Wales	**502**	**4%**	402	5%	100	10%
Australian Capital Territory	**250**	**6%**	200	7%	50	14%
South Australia	**501**	**4%**	401	5%	100	10%
Southeast Queensland	**502**	**4%**	402	5%	100	10%
Tasmania	**250**	**6%**	200	7%	50	14%
TOTAL	**2,508**	**6%**	**2,008**	**2%**	**500**	**4%**

Respondents were aged 18 and over and had to be the person in the household or business who was the main or joint decision maker when it came to choosing their energy retailer. Businesses qualified for the survey if their quarterly electricity bill was below the ranges specified in the table below.

Businesses were only asked the series of questions about gas if their quarterly gas bill was below the amount specified below.

Jurisdiction	Electricity		Gas	
	Metro	Regional	Metro	Regional
Victoria	$2,750	$3,500	$2,300	$2,500
New South Wales	$7,250	$7,750	$4,000	$6,250
Australian Capital Territory	$6,000		$3,750	
South Australia	$13,000	$13,000	$3,750	$3,500
Southeast Queensland	$4,750	$4,750	$6,000	$4,500
Tasmania	$6,000		$7,350	

Surveys were completed using a mixed mode approach in order to reach a broad range of consumers across each jurisdiction. For residential surveys conducted via telephone, sample was sourced randomly via White Pages. For those who completed an online survey, sample was sourced from a leading online panel provider, LightspeedGMI. To ensure the sample excluded respondents who completed the 2014 survey and to also ensure a representative and robust sample was obtained, the decision was made to use a different panel provider to the one used in 2014 (Survey Sampling International). These two panel providers are of equal calibre and Newgate Research is very confident that the results over time are comparable.

The business surveys were predominantly done via telephone using White Pages business sample. As was the case in 2014, respondents were given the option of doing the survey online if they preferred.

In 2014 half of the residential surveys were conducted online and half via telephone. As few differences in responses were found between respondents who completed the survey online and those who completed by telephone, in 2015 a higher proportion of surveys were conducted online. Differences in results due to the methodological change are outlined throughout this report and primarily relate to interest in receiving information online and the amount of don't know responses for the number of energy companies in the market.

A pilot of n=41 residential CATI surveys was conducted on Friday 23rd and Saturday 24th January and fieldwork continued until Tuesday 31st February 2015. The average length of interview was 19 minutes.

Quotas were set for the methodology for both residential and business consumers as follows. The individual jurisdiction chapters show the final breakdown achieved for each state.

Methodology Quotas (n=)	Residential	Business	Total
CATI	500	500	1,000
Online	1,500	-	1,500
Total	**2,000**	**500**	**2,500**

Further quotas were set to ensure a good mix of consumers were included in the research. These are outlined in the quantitative survey in Appendix One. The final data were weighted to reflect the actual population by state using a mix of 2011 ABS Census data and the incidence rates of main or joint decision makers obtained in the online survey.

A respondent profile has been included in Appendix Two to show that there was an excellent mix of consumers included in the sample.

Notes to the Reader

This research was conducted in accordance with AS:ISO 20252:2012, the international quality standard for market and social research to which Newgate Research is certified.

This report presents the findings of the second wave of quantitative research exploring consumer attitudes towards energy markets in Australia. It is set out in chapters by jurisdiction because it was anticipated that many readers would be primarily interested in consumer opinions in their own state. In order to provide some context in terms of how results between jurisdictions compare, the quantitative results in each state include a NEM average. We note however, that this average has limited meaning because all jurisdictions are at various stages of the deregulation journey. It is for this reason that the report does not contain charts showing results by jurisdiction.

Please note that in 2015 Tasmania has also been included in the NEM average. While it is important to keep this in mind when comparing the NEM results between 2014 and 2015, it is unlikely that any significant shifts in the NEM results are due to the inclusion of Tasmania given that this jurisdiction only makes up 2.6% of the population and thus, only contributes to 2.6% of the NEM result (after weighting).

In preparing this report we have presented and interpreted information that we believe to be relevant to achieve the objectives of this research project. Where assumptions are made as a part of interpreting the results or where our professional opinion is expressed rather than merely describing the findings, this is noted. Please ensure that you take these assumptions into account when using this report as the basis for any decision-making.

The base (number and type of respondents) and the actual survey questions are shown underneath the relevant charts and tables. Weighted results are shown throughout the report, unless otherwise specified. Results may not always total 100% due to rounding. For multiple response questions, the results may add up to more than 100% as respondents may have given more than one answer. Results are only shown when the sample sizes are more than 30.

Where appropriate comparisons between the 2014 results and the 2015 results have been shown. Results have not been shown for questions that had a significant wording change since 2014 – these are noted underneath the relevant charts. The questionnaire in Appendix One also highlights the new questions in 2015 (where 2014 data is unavailable) as well as the questions that have had a significant wording change.

For deeper analysis please refer to the additional sub group tables at NEM and state level, which are included in Appendix Three through to Nine.

Any statistically significant differences reported are at the 95% confidence level. Differences between the 2014 and 2015 results are noted using arrows (↑↓). Where there are differences between individual sub-groups, these are indicated using **red** (meaning significantly lower than other groups) or **blue** font (significantly higher than other groups).

Throughout this report barriers to switching are considered. Please keep in mind that barriers are not necessarily negative things that need to be addressed; they cover the full suite of reasons why people have not switched or looked into switching, including positive or neutral reasons such as being satisfied with their current retailer or arrangements or being on a contract.

VICTORIA

NEWGATE RESEARCH

1. Victoria

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1.1 Executive Summary

Introduction

This chapter outlines Newgate Research's findings from quantitative research conducted among small energy consumers in Victoria in February 2015.

The research involved a mix of telephone and online surveys with n=403 residential consumers and n=100 small business consumers. For the purposes of this survey, residential consumers were defined as the person in the household who is the main or joint decision maker when it comes to choosing the energy company. Small business consumers also had to be the main decision maker and, in addition their quarterly electricity bill needed to be less than $2,750 in Melbourne and less than $3,500 in regional Victoria. If they had mains connected gas, their quarterly bill needed to be less than $2,300 in Melbourne and less than $2,500 in regional Victoria.

The sample breakdowns by methodology and for age and gender are shown in the tables below. In addition to these, we note that the sample also included n=329 residential consumers and n=38 small business consumers who had mains connected gas.

Respondent type by mode (n=)	Residential		Small Business	
	Metro	*Regional*	*Metro*	*Regional*
Online	226	76	-	-
Telephone	75	26	75	25
Total	**301**	**102**	**75**	**25**

Age/gender breakdown (residential n=)	Male	Female	Total
18-34	43	41	84
35-54	72	59	131
55+	88	100	188
Total	**203**	**200**	**403**

Further details about the methodology are provided in the Methodology section.

Throughout this chapter, statistically significant differences (95% confidence level) between the 2014 and 2015 results are noted using arrows (↑↓). Where there are differences between individual sub-groups, these are indicated using **red** (meaning significantly lower than other groups) or **blue** font (significantly higher than other groups).

Key Findings

Awareness levels of the ability to choose companies remained extremely high in Victoria

Nearly all consumers in Victoria were aware they could choose their energy company and plan and awareness levels remained fairly consistent with 2014, although there was a significant increase in awareness of the ability to choose their electricity company among business consumers. When it came to confidence in choosing the right energy option or offer or finding the right information to choose a suitable energy deal, Victorian consumers were quite confident overall.

Switching rates for Victorian residential consumers have declined

The proportion of residential consumers that switched their electricity or gas company or plan in the past five years declined significantly (57% down from 67% in 2014). This decline was consistent with an overall decrease across the NEM. Despite this decline, overall switching rates in Victoria remained higher than the NEM average.

Vulnerable customers were more likely to investigate their options but this did not translate to higher levels of switching

Around a third of residential and small business consumers (36%) had actively investigated offers or options that they could potentially switch to in the past 12 months. This was significantly higher among those currently experiencing financial difficulty paying their electricity or gas bill (49%).

In Victoria, higher levels of investigation and interest in seeking out a better deal among those who were currently experiencing difficulty paying their energy bill did result in significantly higher switching rates. This was quite contrary to what was seen in other jurisdictions where despite higher levels of interest or investigation, switching rates were not higher.

Price related factors remained the main reason for switching energy company or plan

Reasons for switching energy company or plan remained consistent, with cheaper prices and discounts most commonly mentioned. Consistent with other jurisdictions, when prompted with a range of factors that could be considered when deciding whether or not to switch, the discounts offered, the estimated total bill amount and the price per unit of energy were by far the most important factors.

A large majority of those who switched were happy with the outcome

The majority of consumers who had switched their electricity company or plan agreed that they were happy with their decision to switch (76% of residents and 79% of small business consumers) and that they got what they expected after they switched (77% of residents and 83% of small business consumers). Similarly, the majority of residential consumers who had switched their gas company or plan agreed that they were happy with their decision to switch (76%) and that they got what they expected after they switched (77%). Despite these high levels of satisfaction with the outcomes, not all would recommend switching to their family, friends and colleagues.

A lack of value proposition and being happy with their current arrangements were the biggest barriers to switching

The main reasons given among residents who had investigated offers but had not switched in the past 12 months were lack of a value proposition (46%). Among residential consumers who had not investigated options nor switched provider or plan, the main reasons given were that they were happy with their current retailer or arrangement (33%) or they were too busy or could not be bothered (23%). These reasons were fairly consistent with 2014.

Attitudes towards switching or investigating offers are in line with the NEM

There remained a fair level of interest in switching with four in ten consumers (41% residential and 38% small business) interested but not currently looking for a better deal. Consistent with 2014, around one in ten residents were currently looking for a better deal (10%). However, significantly fewer business consumers were looking for a better deal in (4% down from 17% in 2014).

Attitudes towards switching and investigating offers in Victoria were fairly consistent with those found in other NEM jurisdictions. The strongest agreement levels were evident for the statements: *I would switch my energy company if I was not satisfied with my current company* and *I'm concerned that if I switch there will be hidden fees and charges*.

Satisfaction with the level of market choice in Victoria among residents remained consistent in 2015

Around two thirds of consumers in Victoria were somewhat or very satisfied with the level of market choice (63% of residents, 64% of small business consumers). These results were in line with the NEM average and fairly consistent with the 2014 results.

Satisfaction with current energy providers remained fairly strong in Victoria

Overall, levels of satisfaction with current energy providers were comparable with the NEM results and there were very few significant differences since 2014. Those with solar panels gave significantly higher ratings of their gas and electricity company.

The internet remained the most popular information source

Consistent with 2014 and with other NEM jurisdictions, internet based information sources continued to be the most used, the most useful and the most preferred method to look for information about energy retailers and plans in general.

There were fair levels of confidence in being able to find the right information

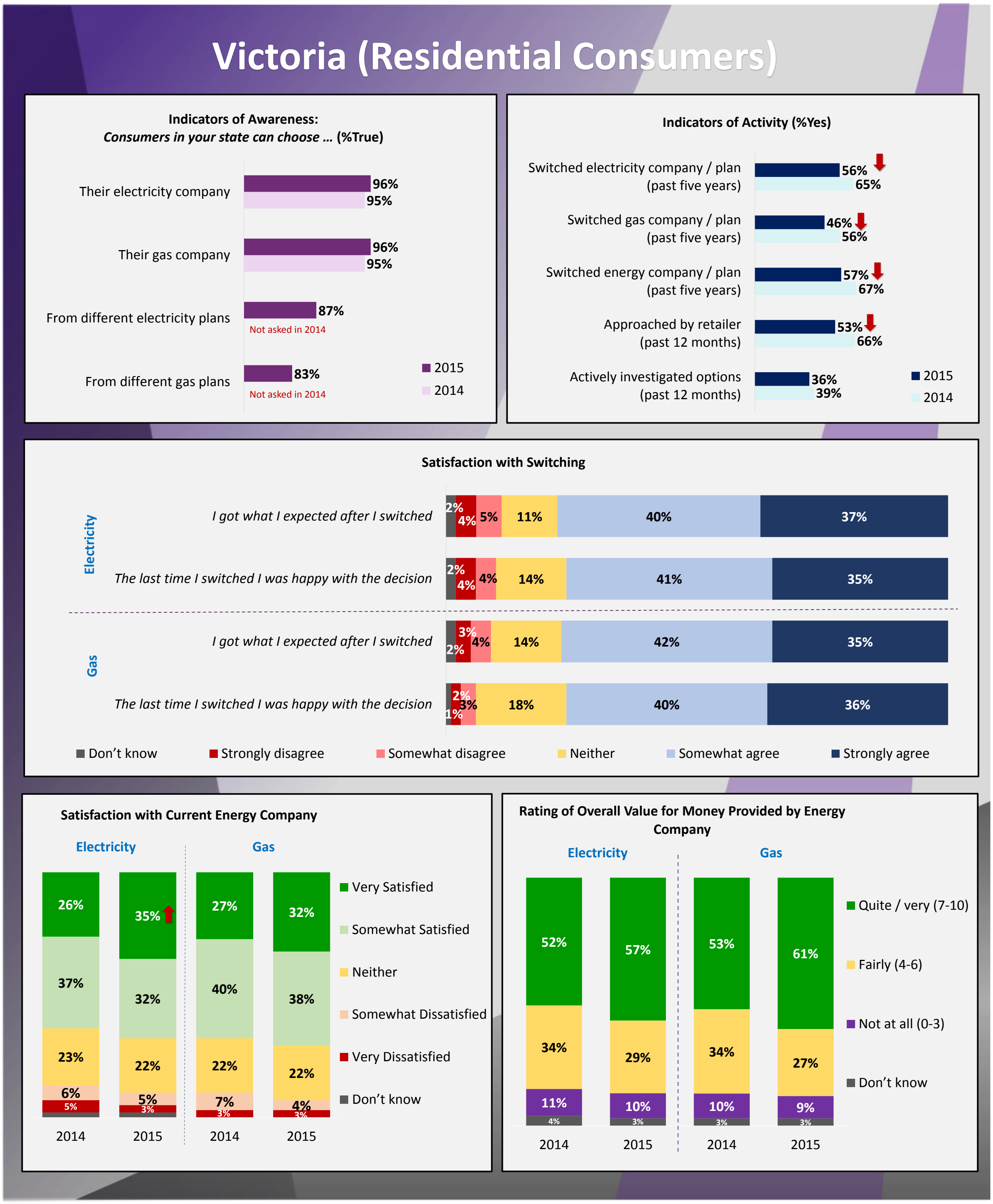
When it comes to confidence in finding the right information to choose a suitable energy plan, around six in ten residential consumers (58%) and half of business consumers (50%) were quite or very confident (rating 7 or more out of 10). This result is fairly consistent with the NEM average. Those who had previously engaged with the energy market had higher levels of confidence.

Unprompted awareness of comparison websites declined significantly in 2015

Around a third of consumers (30% in 2015 up from 20% in 2014) and half of small business consumers (51% in 2015 up from 38% in 2014) could not name any comparison sites at all and a further 4% of residents and 5% of small business consumer were aware there were comparison sites but could not recall any specific names.

When prompted, around three in ten consumers (29% residential, 31% small business consumers) had heard of the Your Choice Comparator website. Two in ten residents (18% up from 8% in 2014) and one in ten small business consumers (11% down from 23% in 2014) had heard of My Power Planner on the Switch On website.

Snapshot of Results



1.2 Key Findings in Detail

1.2.1 Customer Awareness & Understanding

Summary of Findings

In Victoria, consumer awareness of being able to choose their own energy company or plan remained very high. Nearly all consumers surveyed were aware they could choose their electricity company (96% of residential consumers, and 99% of small businesses – a significant increase from 89% in 2014) or gas company (96% of residential consumers, and 96% of small businesses).

Almost nine in ten consumers (87% of residents and 88% of small businesses) were aware they could choose from different electricity plans with different price structures, contract lengths and terms. Awareness of being able to choose from different gas plans was slightly lower with 83% of residents indicating they were aware there were choices (87% among small businesses).

While there are actually 21 electricity brands and 10 gas brands to choose from in Victoria, on average, residents thought there were about eight electricity brands to choose from and about seven gas brands. Small business consumers thought there were about ten electricity brands to choose from and eight gas brands. Although there were slight differences in the averages between 2014 and 2015, these were not statistically significant.

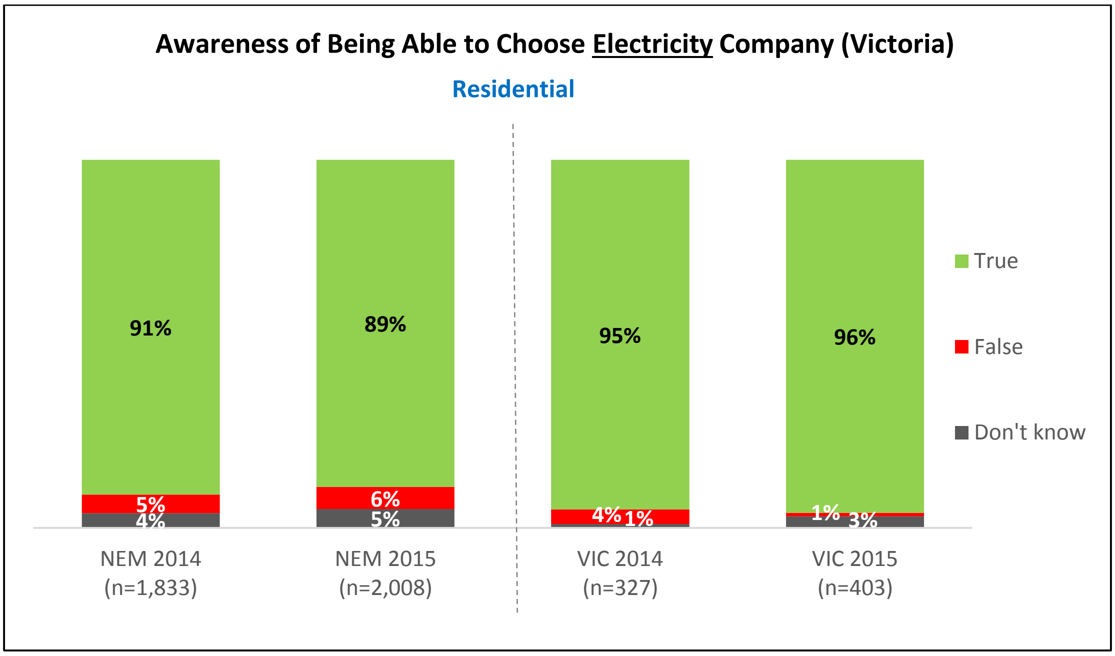
Consumers were fairly confident they could choose the right energy option or offer for their household or business. Six in ten residents (61%) and almost half of small business consumers (47%) rated their confidence as seven or more out of ten. Please note, however, that previous qualitative research conducted in 2014 suggests that consumer confidence levels tend to be overstated and that very few actually know much about the plan they are on or the specifics of how their bills are calculated.

The following groups of residential consumers had significantly higher confidence levels:

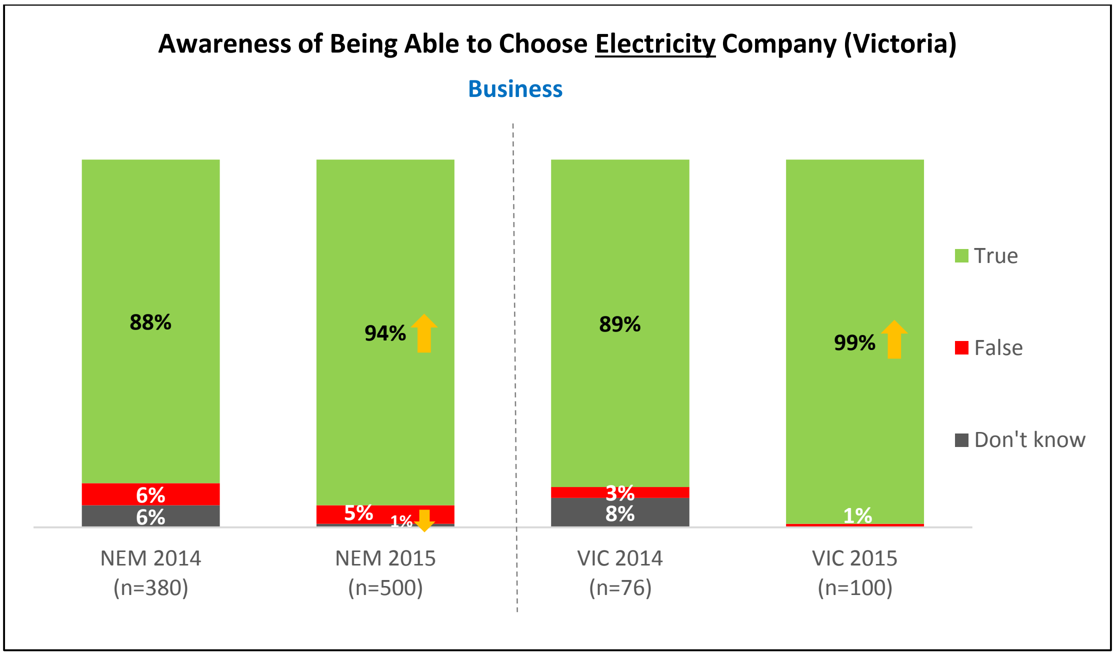
- Those on special payment arrangements as a result of financial hardship;
- Those who were not currently experiencing financial difficulty paying their bill;
- Those with solar panels; and
- Those who had actively investigated offers in the past 12 months.

Awareness and confidence levels in Victoria were higher than the NEM average. Please note that confidence levels have not been compared to the 2014 results due to a change in the question wording in the 2015 survey.

The Results



Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



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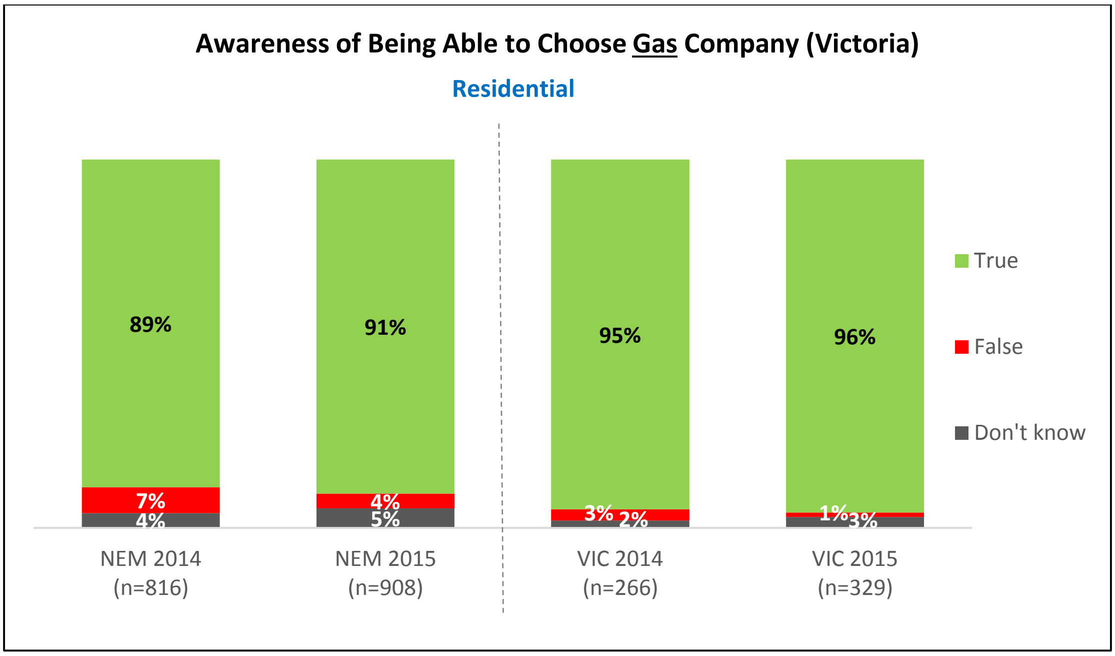
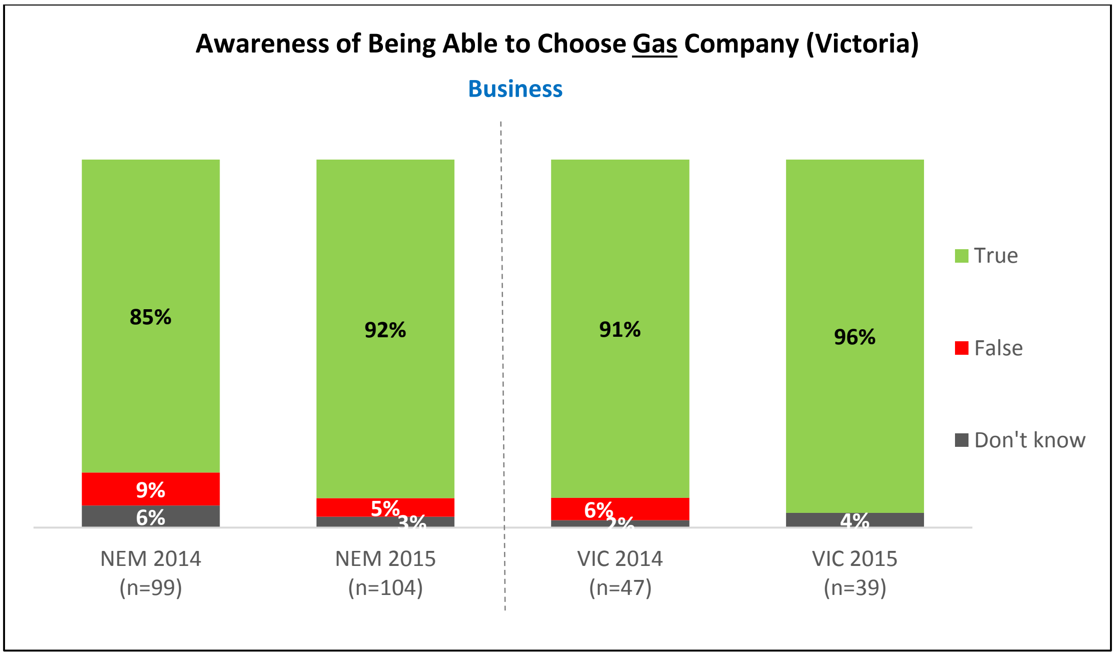
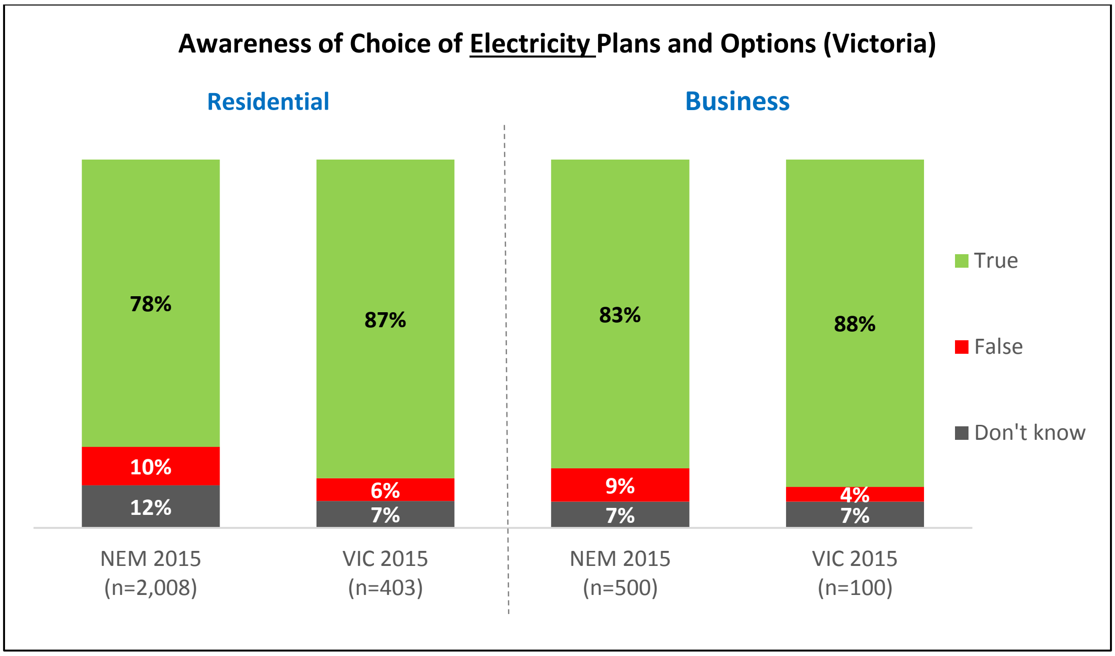


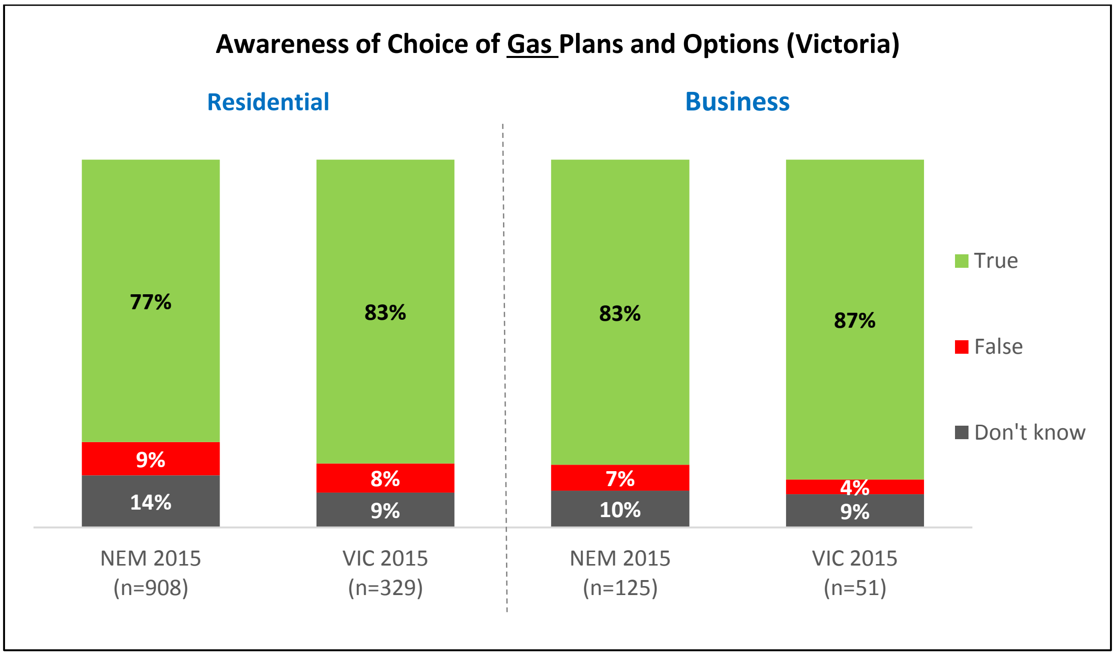
Base: Respondents with mains connected gas
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company



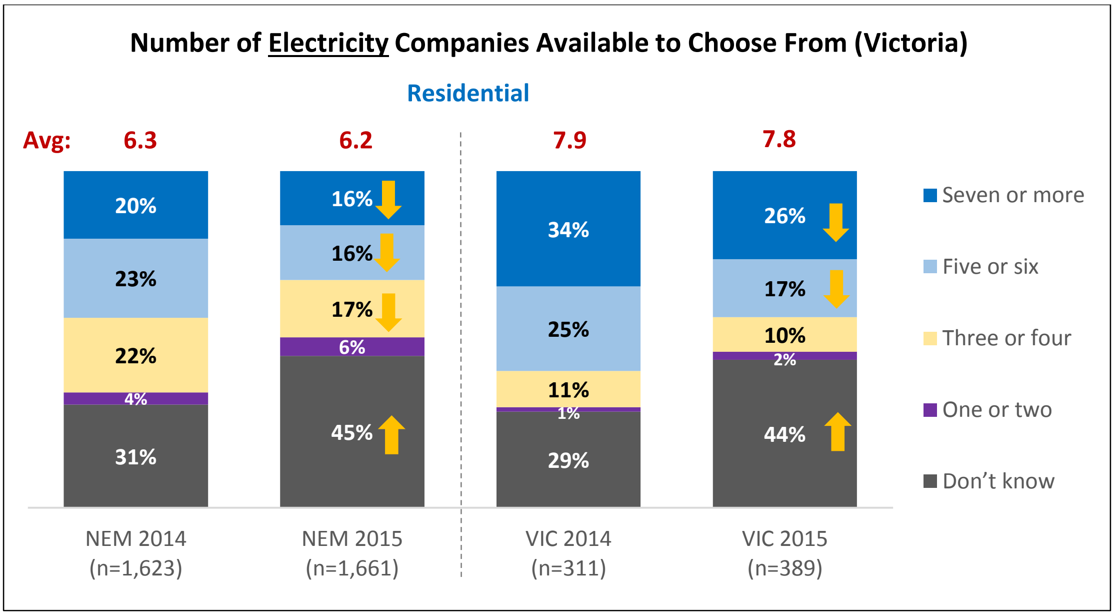
Base: Respondents with mains connected gas
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company



Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



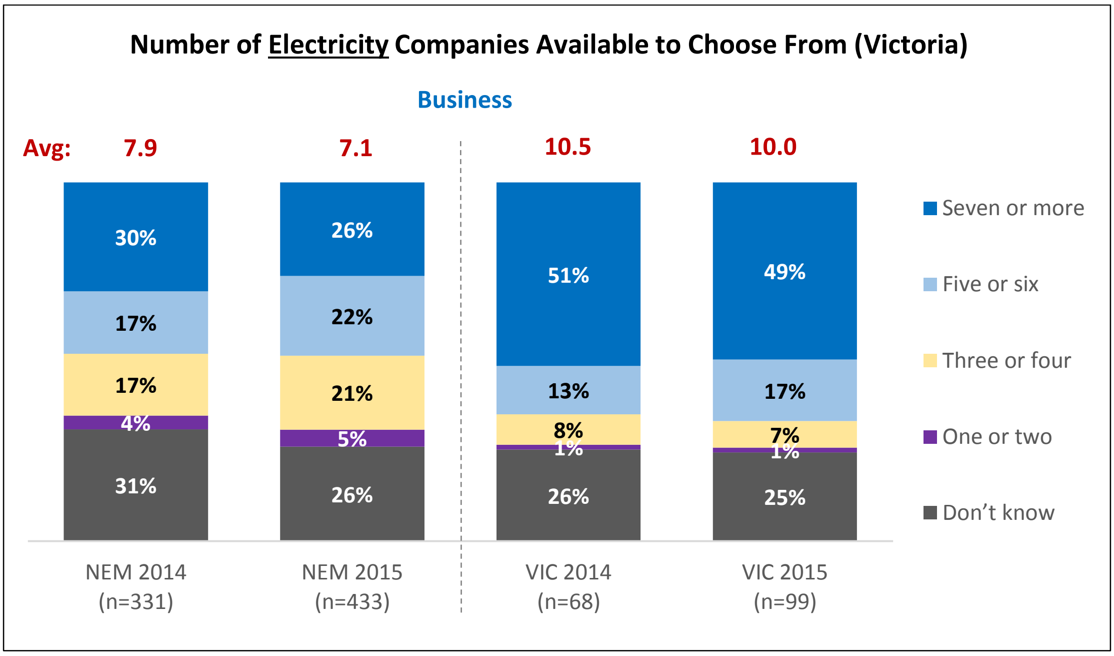
Base: Respondents with mains connected gas
Q13. Please tell me whether you think the following statements are True or False. d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



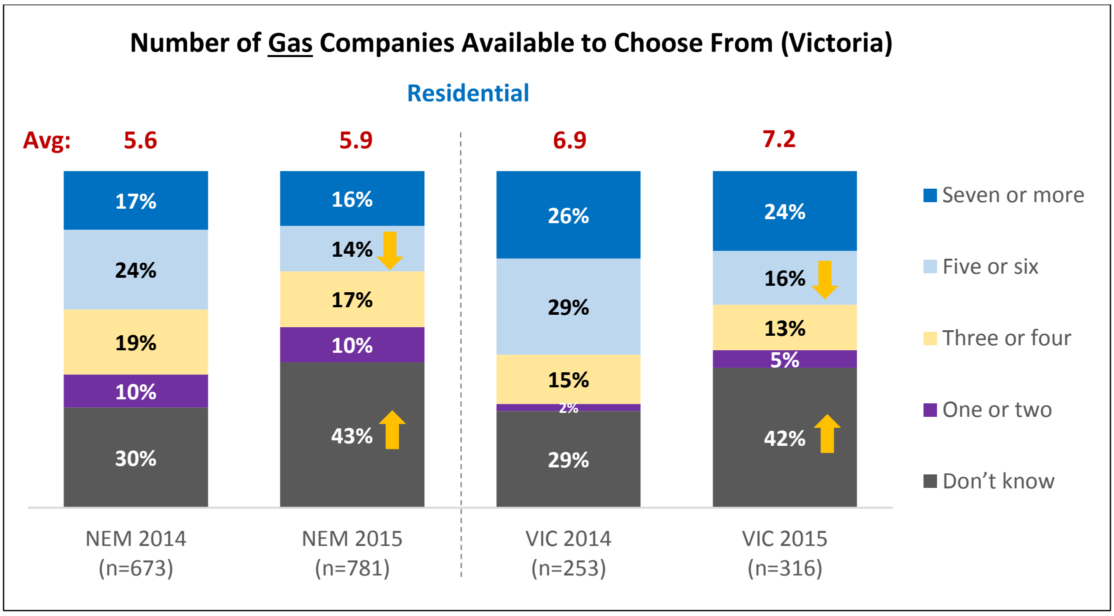
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?

Note that in 2015 there was an increase in the proportion of residential consumers who said they 'don't know' how many companies there are to choose from in their state. This increase is likely to be a result of an increase in the number of surveys completed online. Analysis of the results by survey mode shows that the online survey results in 2015 were very consistent with 2014 and similarly the telephone survey results have remained consistent.

The increase in the proportion of 'don't know' responses does not affect the averages presented in the charts since they are excluded from the calculation of the average. As such, the 2015 averages are directly comparable with the 2014 results.



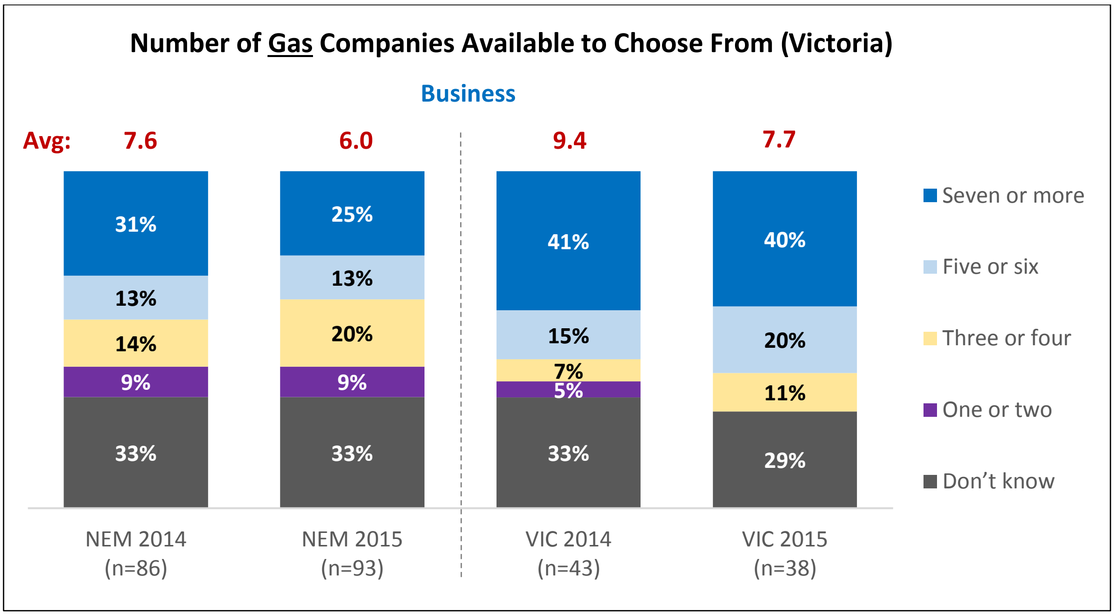
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



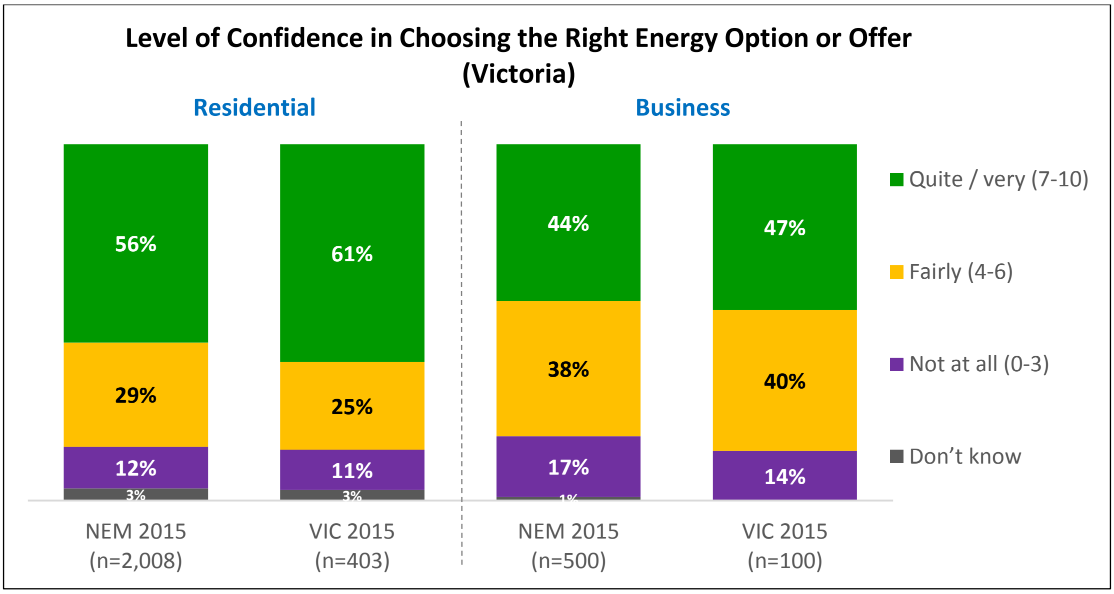
Base: Respondents who say they can choose their gas company
Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory?

Note that in 2015 there was an increase in the proportion of residential consumers who said they 'don't know' how many companies there are to choose from in their state. This increase is likely to be a result of an increase in the number of surveys completed online. Analysis of the results by survey mode shows that the online survey results in 2015 were very consistent with 2014 and similarly the telephone survey results have remained consistent.

The increase in the proportion of 'don't know' responses does not affect the averages presented in the charts since they are excluded from the calculation of the average. As such, the 2015 averages are directly comparable with the 2014 results.



Base: Respondents who say they can choose their gas company
Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory?



Base: All Respondents
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

1.2.2 Market Participation

Summary of Findings

Incidence of Switching or Investigating Offers

To be consistent with the 2014 survey, consumers were asked how many times they had switched their electricity or gas company or plan in the past five years. To allow more granular tracking in future, those who had switched at least once in the past five years were also asked how many times they switched in the past 12 months.

In Victoria three in ten residential consumers (29%) and four in ten small business consumers (39%) had changed their electricity or gas company or plan in the past 12 months. Switching rates in Victoria in the past 12 months were higher than the NEM average (23% of residents and 29% of small business consumers had switched in the past 12 months).

Over half of the consumers surveyed had switched their electricity company or plan in the last five years (56% of residents, 59% of small businesses). Less than half of the residents surveyed (46%) and just two in ten small business consumers (17%) had switched their gas company or plan in the past five years.

While five year switching rates in Victoria remained higher than the NEM average, switching rates over this five year period were significantly lower than those reported in 2014 when 67% of residents said they had switched their electricity or gas company or plan in the past five years compared with just 57% in 2015. This decline was consistent with an overall decrease across the NEM.

The decrease in switching rates is most likely due to fewer direct approaches by energy companies offering to sell consumers electricity or gas in the past 12 months. In 2014 two-thirds of residential consumers had been approached by an energy company (66%) compared with just half in 2015 (53%). There was also a significant decrease in the number of companies that consumers reported they had been approached by in the past 12 months (average 2.5 in 2015 down from 3.6 in 2014). Further, the proportion who indicated they switched their electricity or gas company or plan because they were offered a discount or better price also decreased in 2015 from 2014 (from 29% to 18% for electricity and from 30% to 19% for gas).

The following types of residential consumers were significantly more likely to have switched electricity or gas company or plan in the past five years:

- Those with an income under $50k;
- Those currently experiencing financial difficulty paying their bill;
- Those with solar panels;
- Those who had been approached by an energy company; and
- Those who had actively investigated offers.

Further, those on a payment arrangement as a result of financial hardship were significantly more likely to have switched energy company or plan in the past 12 months.

Around a third of residential and small business consumers (36%) had actively investigated offers or options that they could potentially switch to in the past 12 months. This represents a significant decrease for small business consumers in 2015 (down from 57% in 2014) and was consistent with an overall decrease across the NEM.

Motivations for Switching

Price related factors remained the main reason for switching energy company or plan in 2015 (66% of residential respondents mentioned this unprompted). When prompted with a range of factors that could be considered when deciding whether or not to switch, the most important factors for both residents and small business consumers were the estimated total bill amount followed by the discounts offered and the price per unit of energy. The availability of green energy plans was ranked as a lower level priority. The relative importance of these factors was consistent with all other NEM jurisdictions.

For consumers with solar panels, the solar feed-in tariff was a higher level priority (43% rated the importance of this as 10 out of 10, and 31% rated 8 or 9 out of 10) – however these consumers still thought the price per unit of energy was of higher importance than the solar feed-in tariff (46% of those with solar rated this as 10 out of 10).

Satisfaction with Switching

The majority of consumers who had switched their electricity company or plan agreed that they were happy with their decision to switch (76% of residents and 79% of small business consumers) and that they got what they expected after they switched (77% of residents and 83% of small business consumers). Similarly, the majority of residential consumers who had switched their gas company or plan agreed that they were happy with their decision to switch (76%) and that they got what they expected after they switched (77%).

Those who were happy with their decision to switch were most likely to feel that way as a result of cheaper prices, discounts and incentives received (74% of residents, 81% of small business consumers for electricity and 76% of residents for gas).

Despite these satisfaction levels, just three in five consumers who switched company or plan agreed that they would recommend switching to their family, friends or colleagues (60% of residents and 54% of small business consumers who switched electricity and 55% of residents who switched gas). As with other NEM jurisdictions, consumers who agreed they got what they expected and were happy with their decision to switch were significantly more likely to recommend switching compared to those who were not as satisfied with the outcomes.

When it came to the ease of comparing offers when deciding whether or not to switch electricity company or plan, around six in ten residential consumers (60%) and just over half of small business consumers (55%) found it fairly or very easy to compare electricity offers and options. Likewise, the majority of residential consumers rated the ease of switching their gas provider or plan as fairly or very easy (65%).

However, compared with the ease of comparing offers for a range of other services including home, car or health insurance, banking or communications, both electricity and gas were ranked lowest among residential consumers.

Barriers to Investigating Offers or Switching

The main reasons given among residents who had investigated offers but had not switched in the past 12 months were due to a lack of value proposition (46%). Lower level reasons given were that the information was too confusing (12%) or they felt it is too much hassle, they could not be bothered or they were too busy (7%).

Among residential consumers who had not investigated options nor switched provider or plan, the main reasons given were that they were happy with their current retailer or arrangement (33%) or they were too busy or could not be bothered (23%). These barriers were fairly consistent with those mentioned in 2014.

Among business consumers who had not investigated options nor switched provider nor plan, the main reasons given were that they were too busy or could not be bothered (32%), they were happy with their current retailer or arrangements (29%) or they felt there was a lack of value proposition (19%).

Switching Intentions and Attitudes

When asked about their current intentions in relation to switching, consumers in Victoria had similar results to other NEM jurisdictions:

- One in ten residential consumers (10%) indicated they were currently looking for a better deal. Significantly fewer business consumers were looking for a better deal in 2015 than in 2014 (4% down from 17%);
- Around four in ten consumers surveyed (41% residential, 38% business consumers) were interested but not currently looking for a better deal;
- Around one in ten residential (13%) and a quarter of business consumers (25%) had recently switched and were not interested in looking for a while (new response option in 2015); and
- Just over a quarter of consumers (30% of residential, 27% small business) were not interested in switching at all.

The following types of residential consumers were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal:

- Those in a medium income household;
- Those not currently receiving a rebate or concession;
- Those currently experiencing financial difficulty paying their electricity or gas bill;
- Those with solar panels;
- Those who have actively investigated offers and options; and
- Those with a high quarterly gas bill.

Residential consumers who were not interested in switching were more likely to be:

- Those aged 55 years or over;
- Those in a low income household;
- Retirees; and
- Those who have not previously switched company or plan in the past five years.

In order to seriously consider switching their company or plan, residents wanted to save an average of $201 per year on their electricity bill and $169 on their gas bill. This was in line with NEM averages. Small business consumers wanted to save about $366 on their electricity bill and $196 on their gas bill in order to consider switching - this was less than the NEM averages ($609 and $249 respectively). Consistent with other NEM jurisdictions, those with higher energy bills wanted to see a bigger saving before they considered switching.

Attitudes towards switching and investigating offers in Victoria were fairly consistent with those found in other NEM jurisdictions. The strongest agreement levels were evident for the statements: *I would switch my energy company if I was not satisfied with my current company* (80% residential, 88% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (65% residential, 66% small business).

Further analysis showed the following attitudinal differences among residential consumers:

- Those living in metropolitan areas were more likely to agree with the following statements compared to those in regional areas:
  - *I would switch my energy company if I was not satisfied with my current company;*
  - *I'm concerned that if I switch there will be hidden fees and charges;*
  - *I don't trust energy companies who promise a better deal; and*
  - *I can't be bothered looking for a better deal.*

- Those who had switched in the past five years were significantly <u>less</u> likely to agree with the following statements compared to those who had not:
    - *The amount of money I could save is not worth the time and effort;*
    - *I'm concerned that if I switch there will be hidden fees and charges;*
    - *It's too complicated to try and compare the various options and offers;*
    - *I'd prefer to try and save energy to reduce my bill than to seek out a better deal;*
    - *I don't trust energy companies who promise a better deal; and*
    - *I can't be bothered looking for a better deal.*

Vulnerable Consumers

In Victoria, vulnerable customers were more likely to have actively investigated their options and were more interested in seeking out a better deal. Unlike for some other jurisdictions, this did result in significantly higher switching rates among those who were currently experiencing difficulty paying their energy bill.

The Results

Incidence of Switching or Investigating Offers

In the Last Five Years

Provider (% switched at least once)	Residential			
	NEM		Victoria	
	2014 (n=1,833)	2015 (n=2,008)	2014 (n=327)	2015 (n=403)
Electricity Company	48%	39% ↓	54%	48%
Electricity Plan	39%	31% ↓	43%	35% ↓
TOTAL Electricity	**60%**	**50% ↓**	**65%**	**56% ↓**
Gas Company	40%	35% ↓	47%	39%
Gas Plan	30%	24% ↓	31%	23% ↓
TOTAL Gas	**49%**	**40% ↓**	**56%**	**46% ↓**
TOTAL Electricity or Gas	**61%**	**51% ↓**	**67%**	**57% ↓**
Car Insurance	37%	35%	33%	31%
Mobile	32%	31%	32%	32%
Internet	30%	29%	28%	27%
Home Insurance	22%	26% ↑	22%	23%
Home Phone	22%	20%	21%	17%
Banking	18%	19%	18%	17%
Health Insurance	13%	16%	13%	17%

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

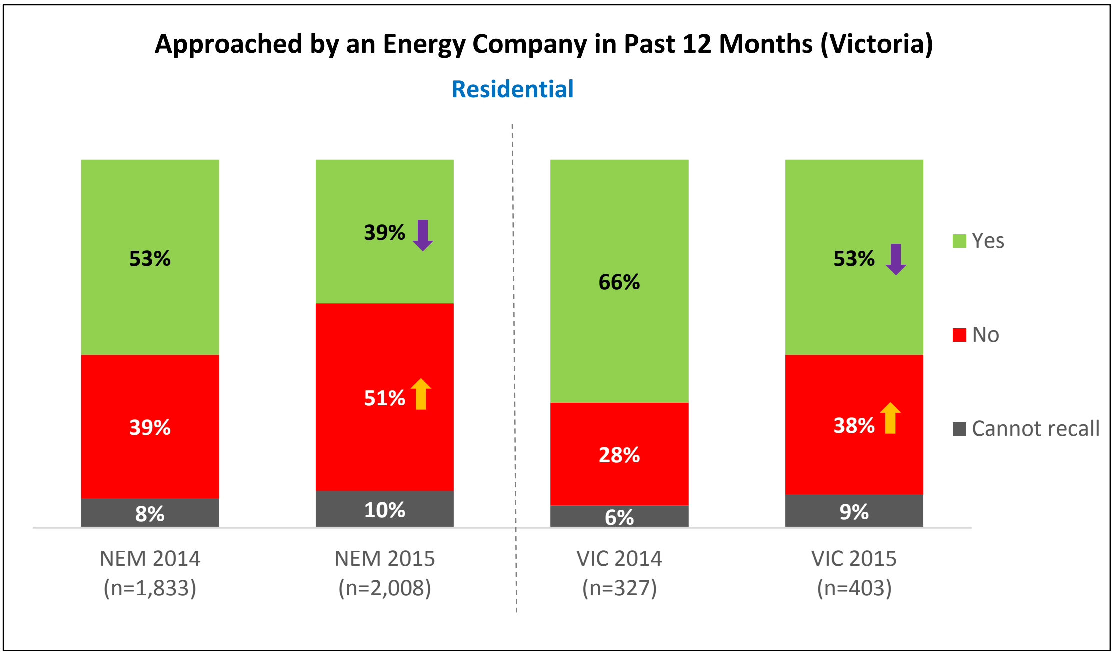
Provider (% switched at least once)	Business			
	NEM		Victoria	
	2014 (n=380)	2015 (n=500)	2014 (n=76)	2015 (n=100)
Electricity Company	47%	44%	57%	50%
Electricity Plan	39%	33%	46%	27%↓
TOTAL Electricity	**56%**	**55%**	**65%**	**59%**
Gas Company	46%	19%	52%	10%↓
Gas Plan	50%	16%	60%	15%↓
TOTAL Gas	**56%**	**23%**	**67%**	**17%↓**
TOTAL Electricity or Gas	**57%**	**56%**	**66%**	**60%**

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?

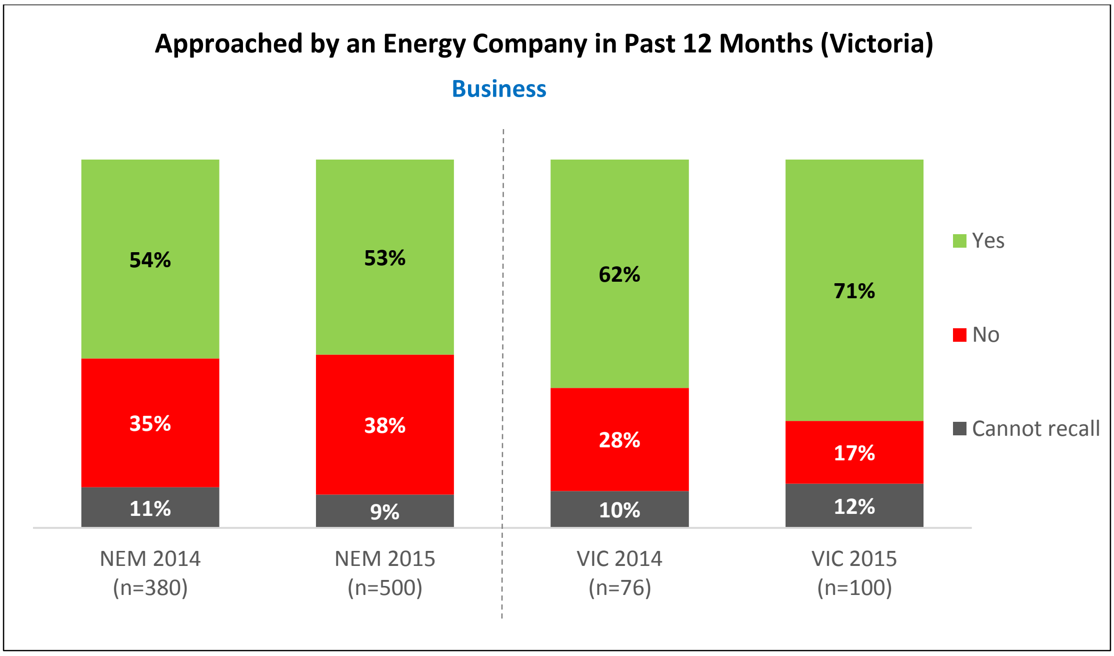
In the last 12 months

Provider (% switched at least once)	Residential		Business	
	NEM (n=2,008)	Victoria (n=403)	NEM (n=500)	Victoria (n=100)
Electricity Company	14%	21%	18%	29%
Electricity Plan	16%	18%	17%	15%
TOTAL Electricity	**22%**	**27%**	**28%**	**39%**
Gas Company	17%	18%	10%	10%
Gas Plan	14%	13%	10%	10%
TOTAL Gas	**21%**	**23%**	**13%**	**12%**
TOTAL Electricity or Gas	**23%**	**29%**	**29%**	**39%**

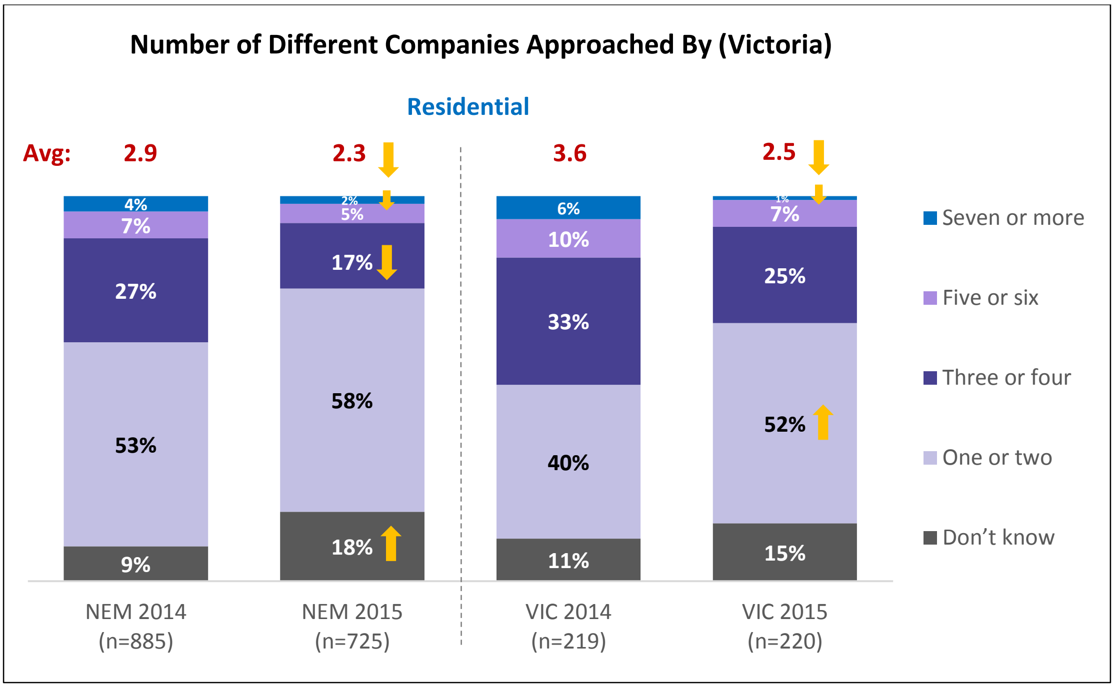
Base: All Respondents
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?



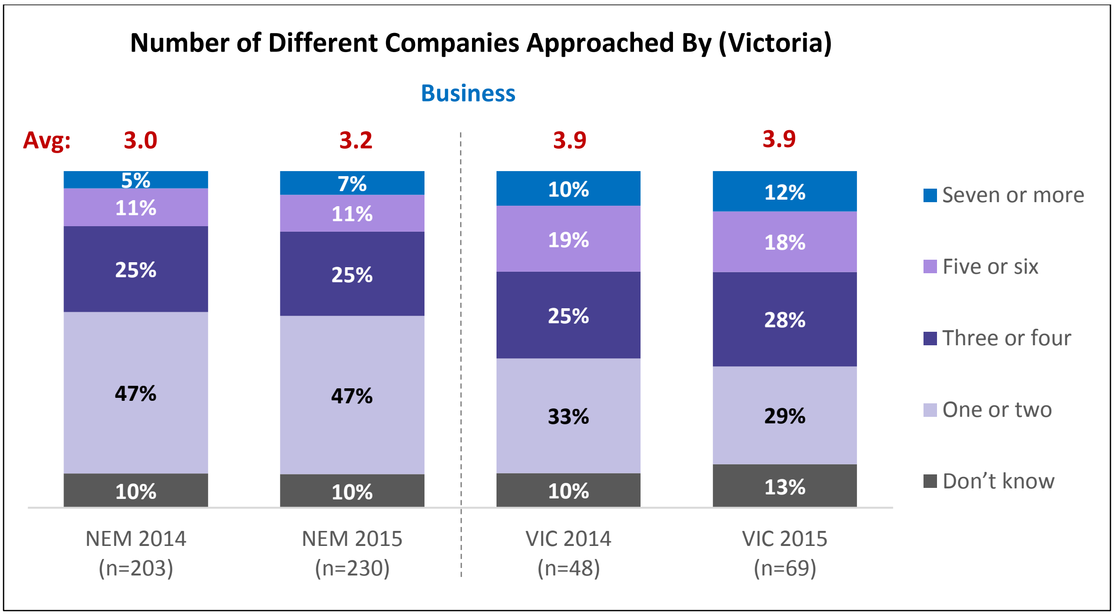
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



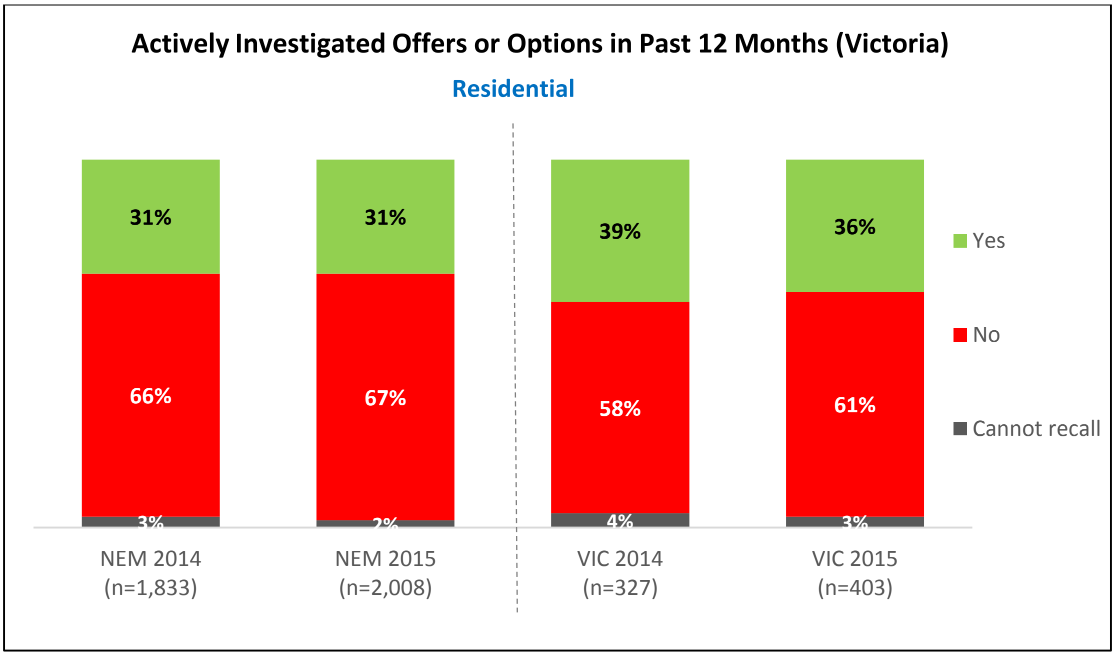
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



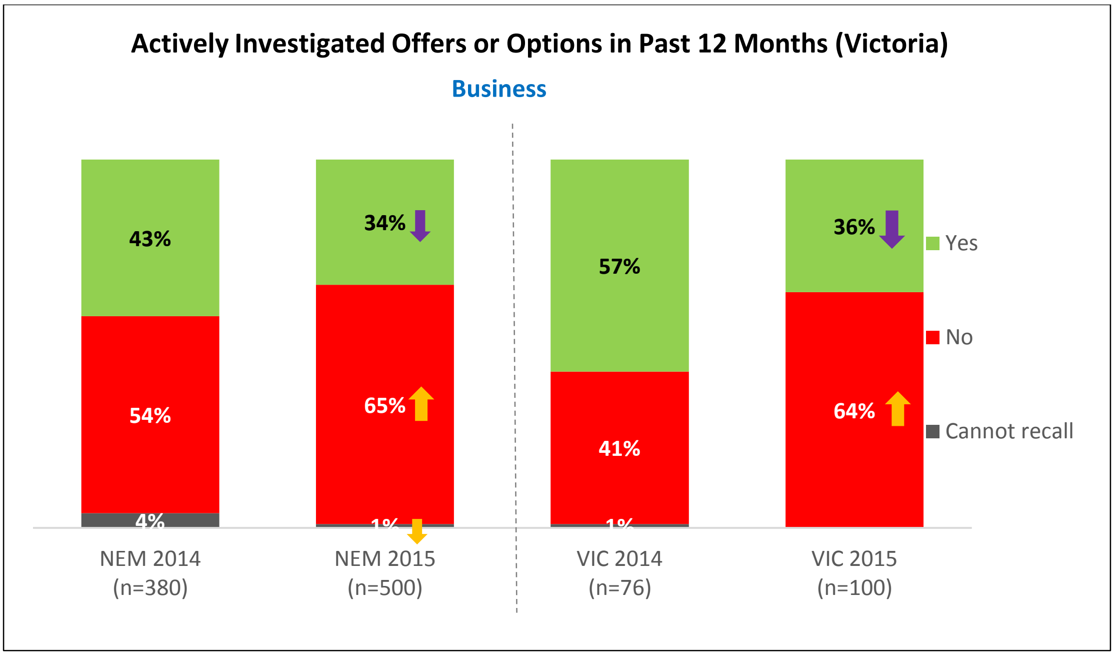
Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?



Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?

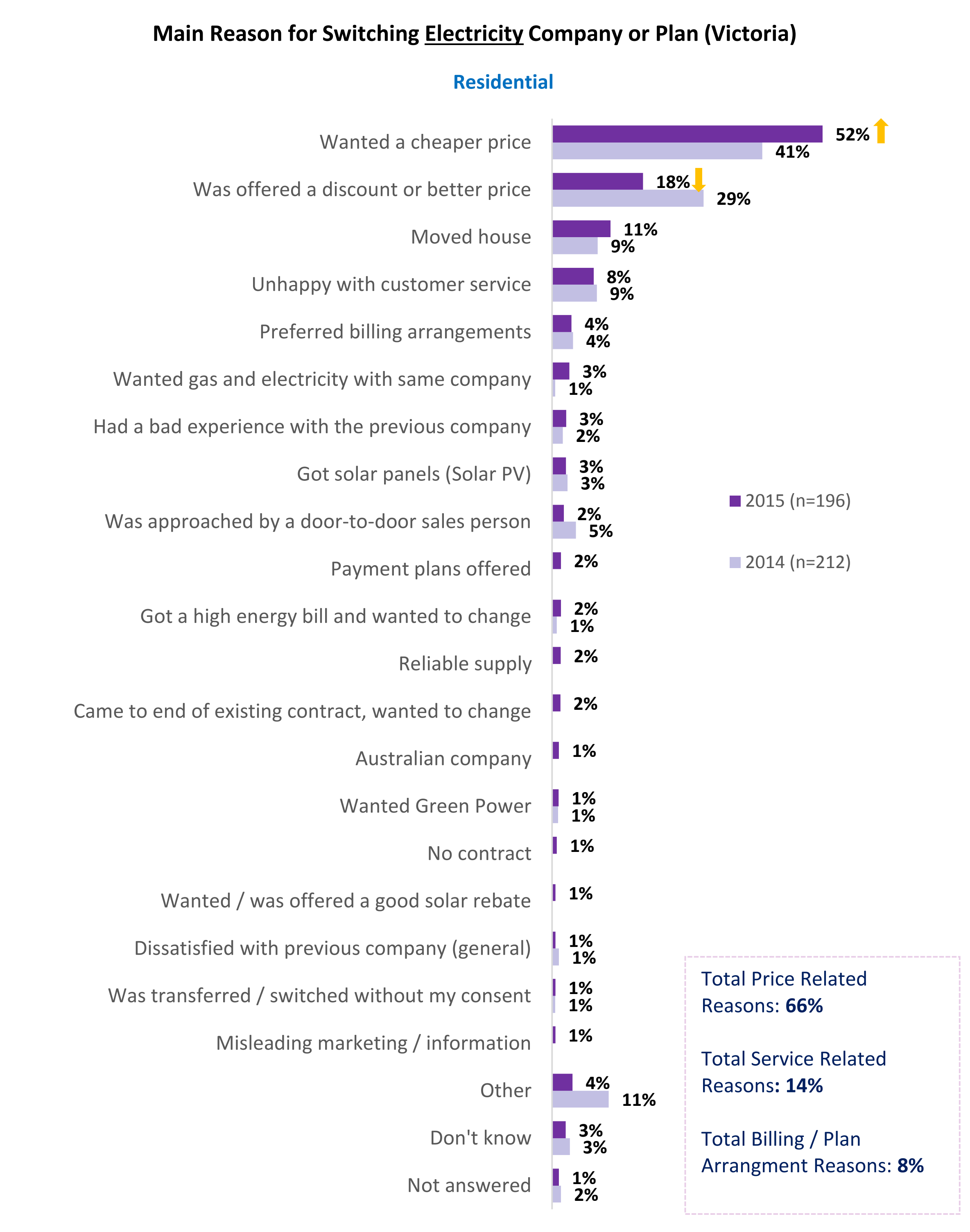


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

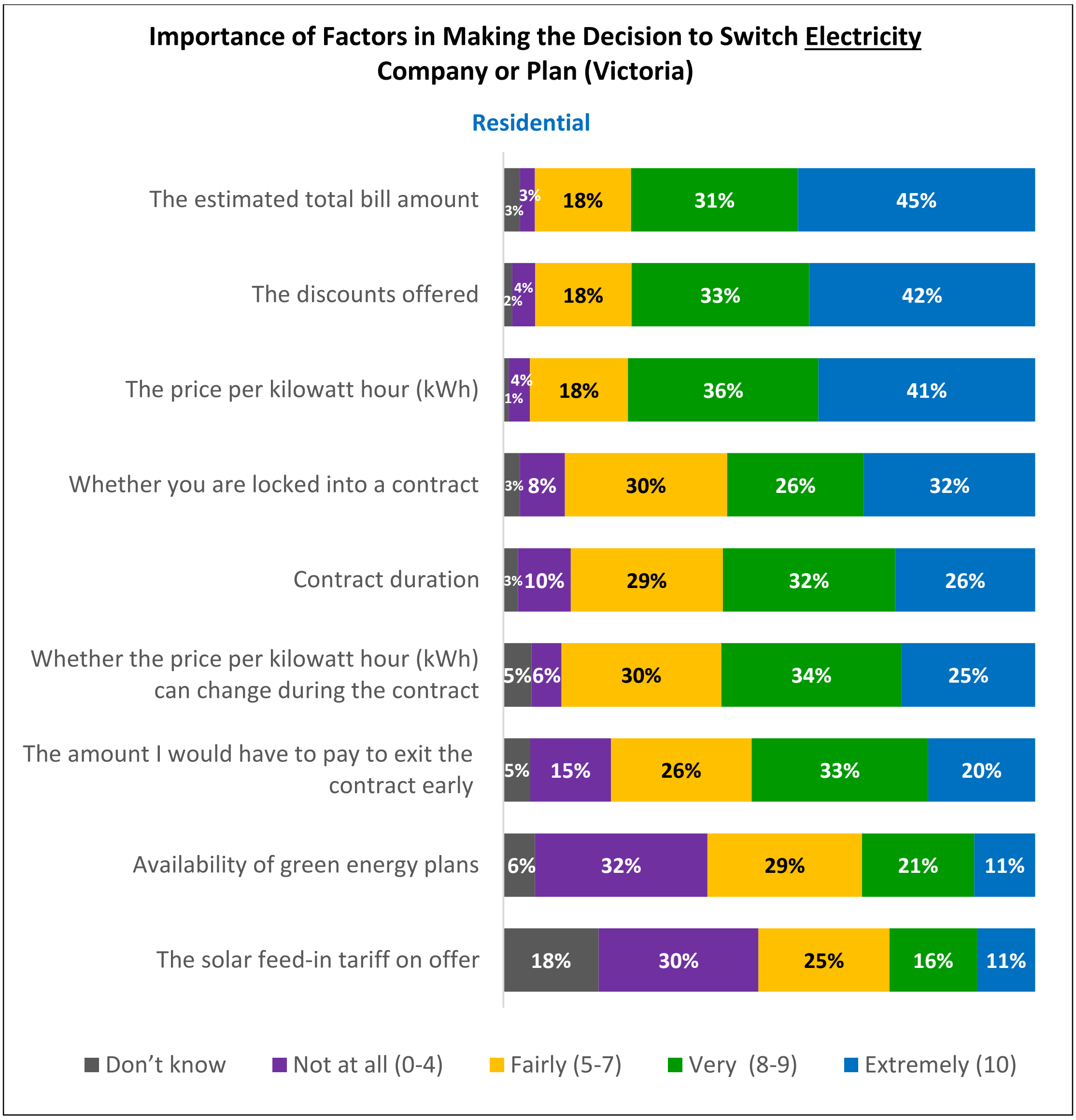


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

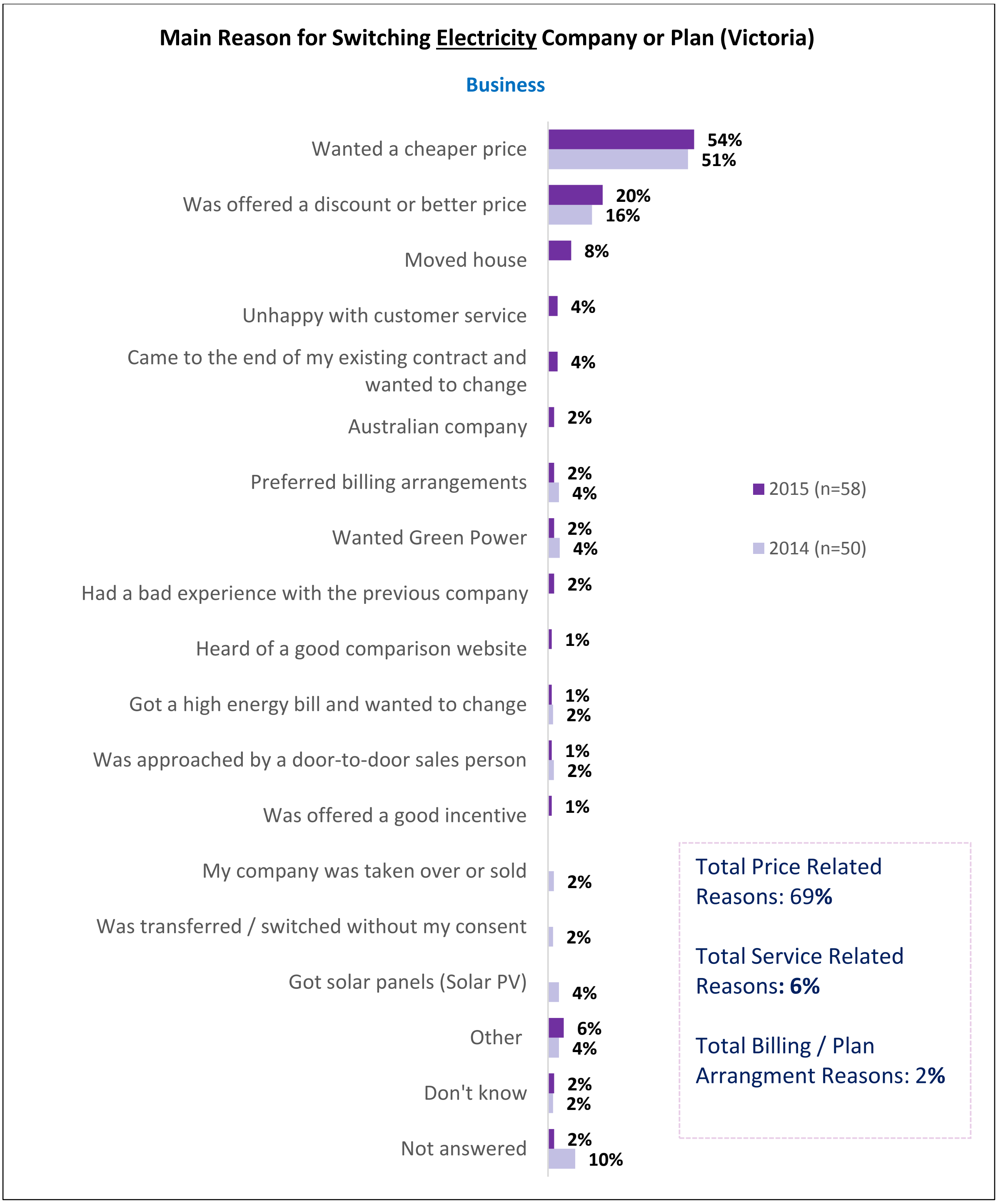
Motivations for Switching



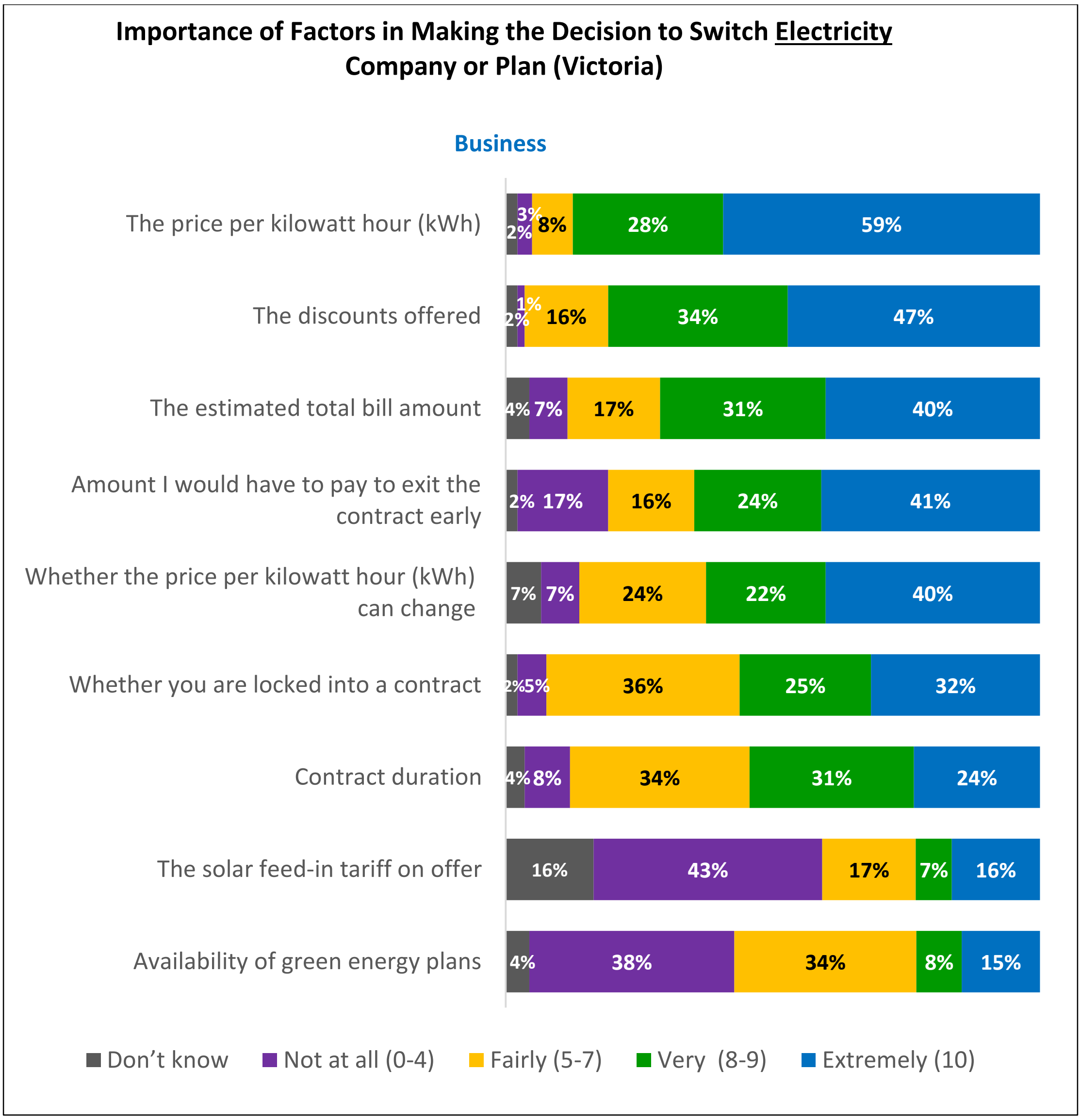
Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



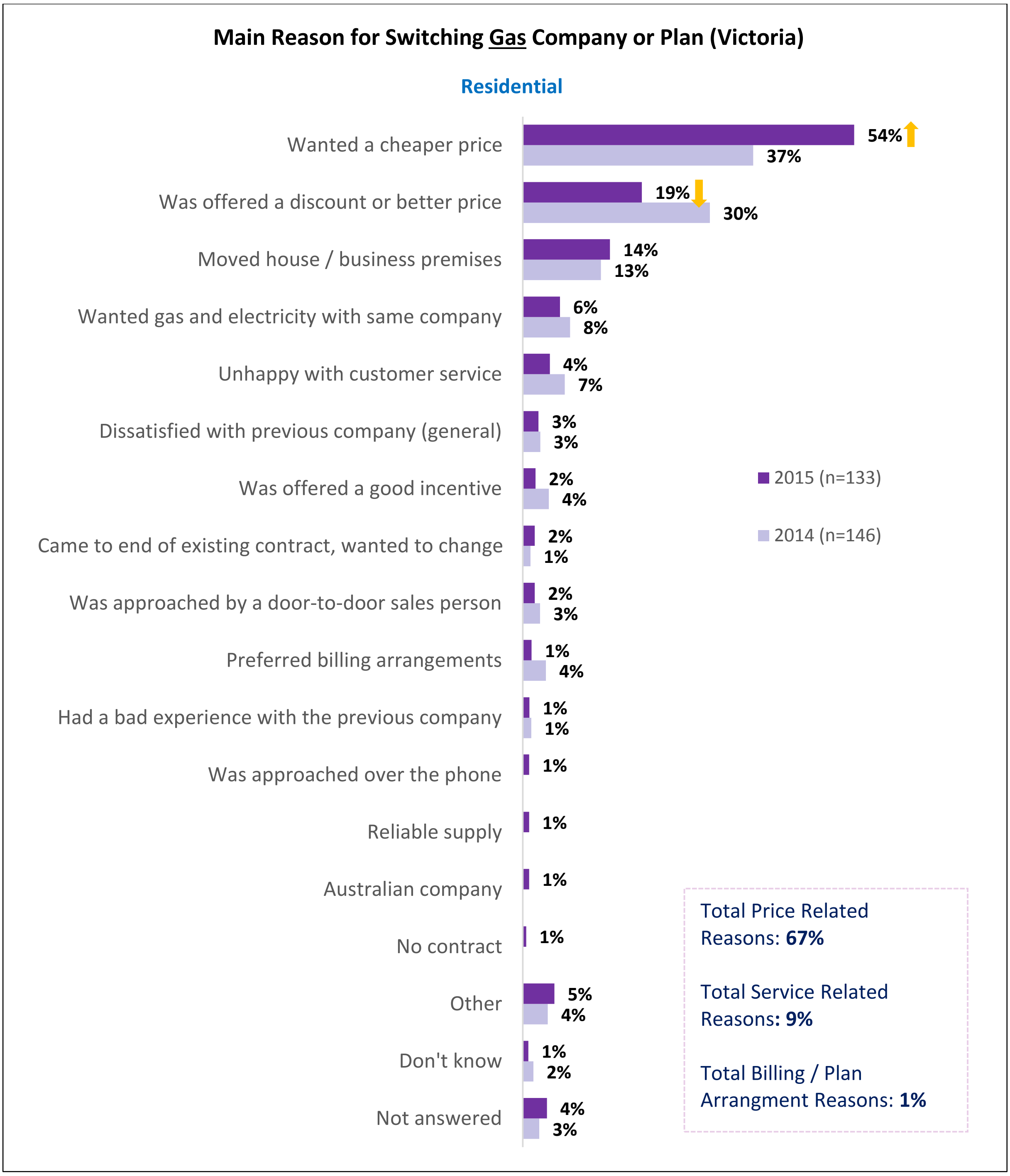
Base: Respondents who switched their electricity company or plan (Residential n=196)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?



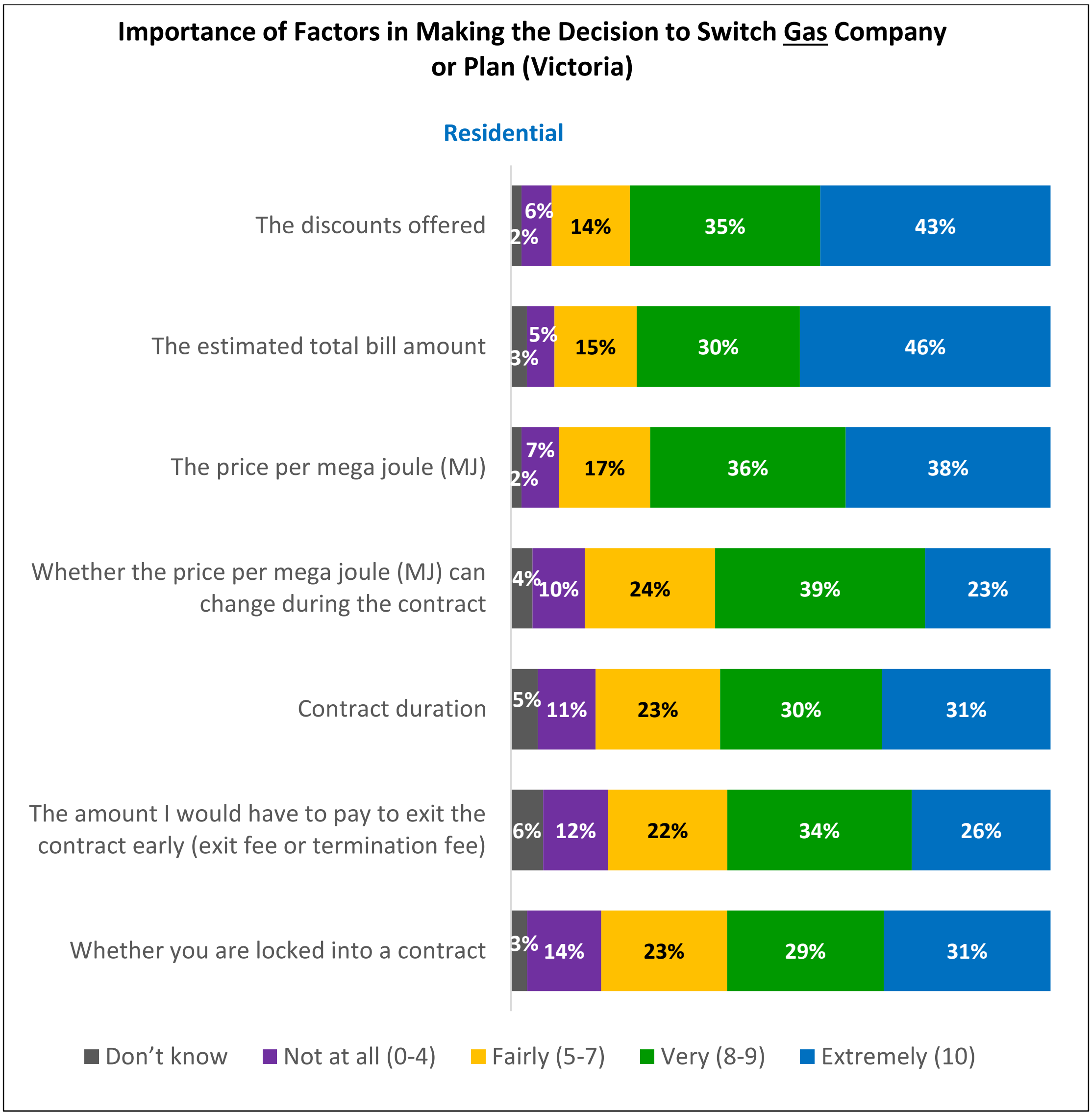
Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



Base: Respondents who switched their electricity company or plan (Business n=100)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?

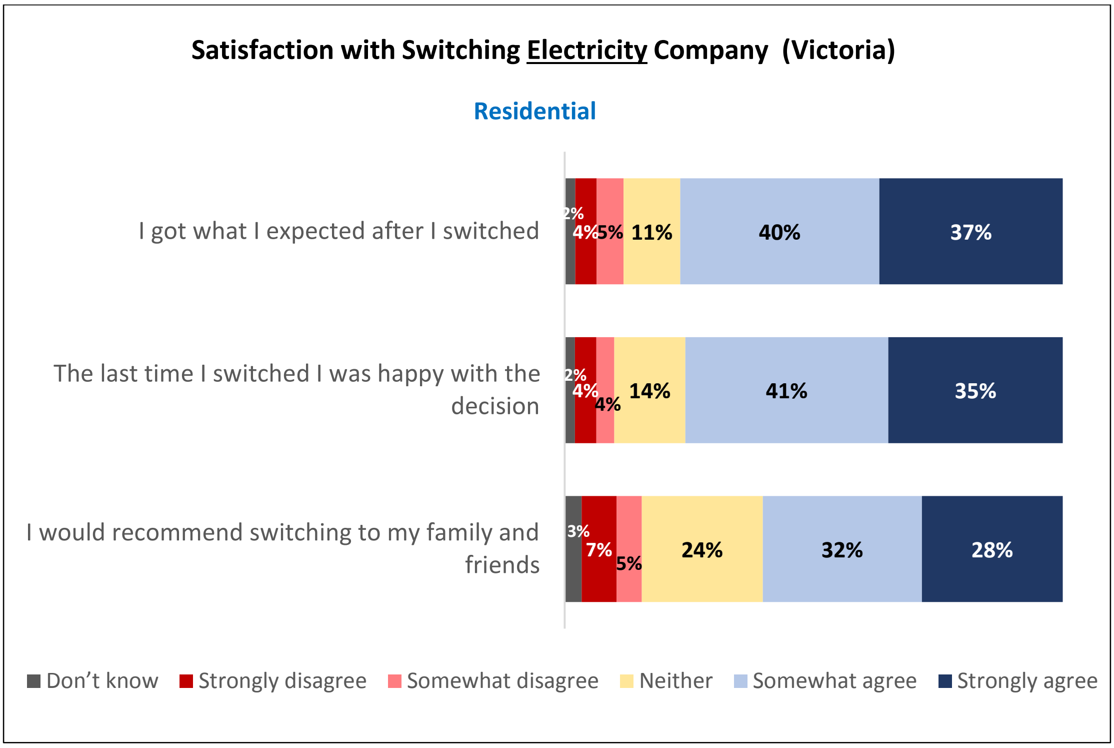


Base: Respondents who switched their gas company or plan
Q27. You mentioned you changed your gas company or plan in the past five years. The last time you switched, what was the main reason? Any other reasons? MULTIPLE RESPONSE

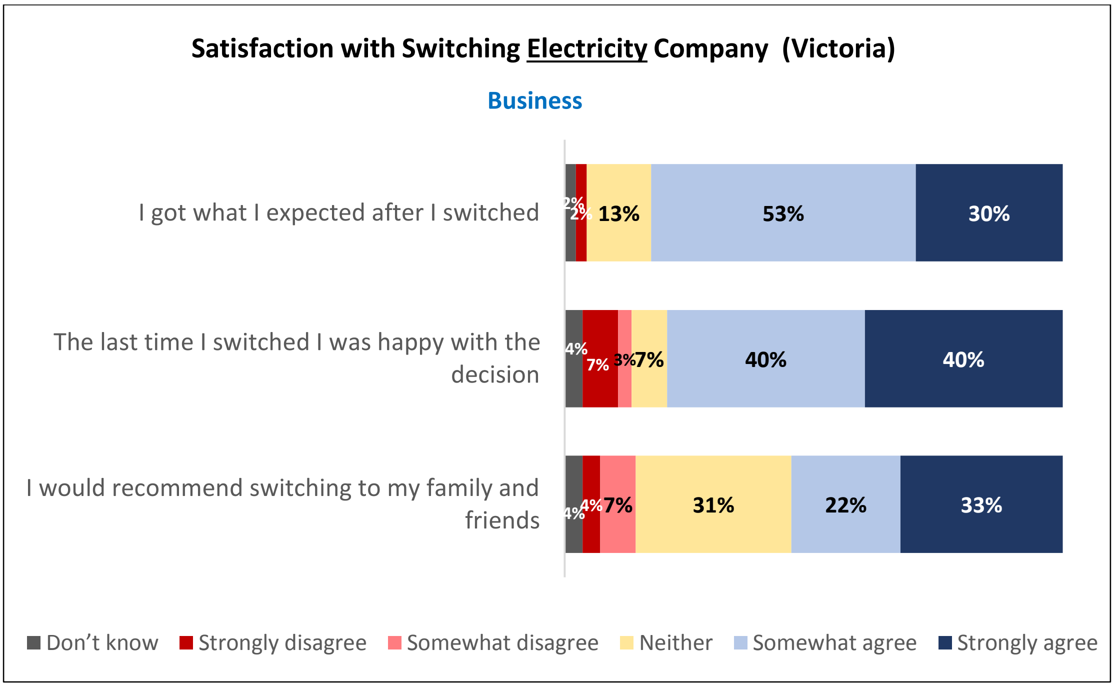


Base: Respondents who switched their gas company or plan (Residential n=133). NB: Business results not shown due to small sample size (n=7)
Q54. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your gas company or plan where 0 means not at all and 10 means extremely important?

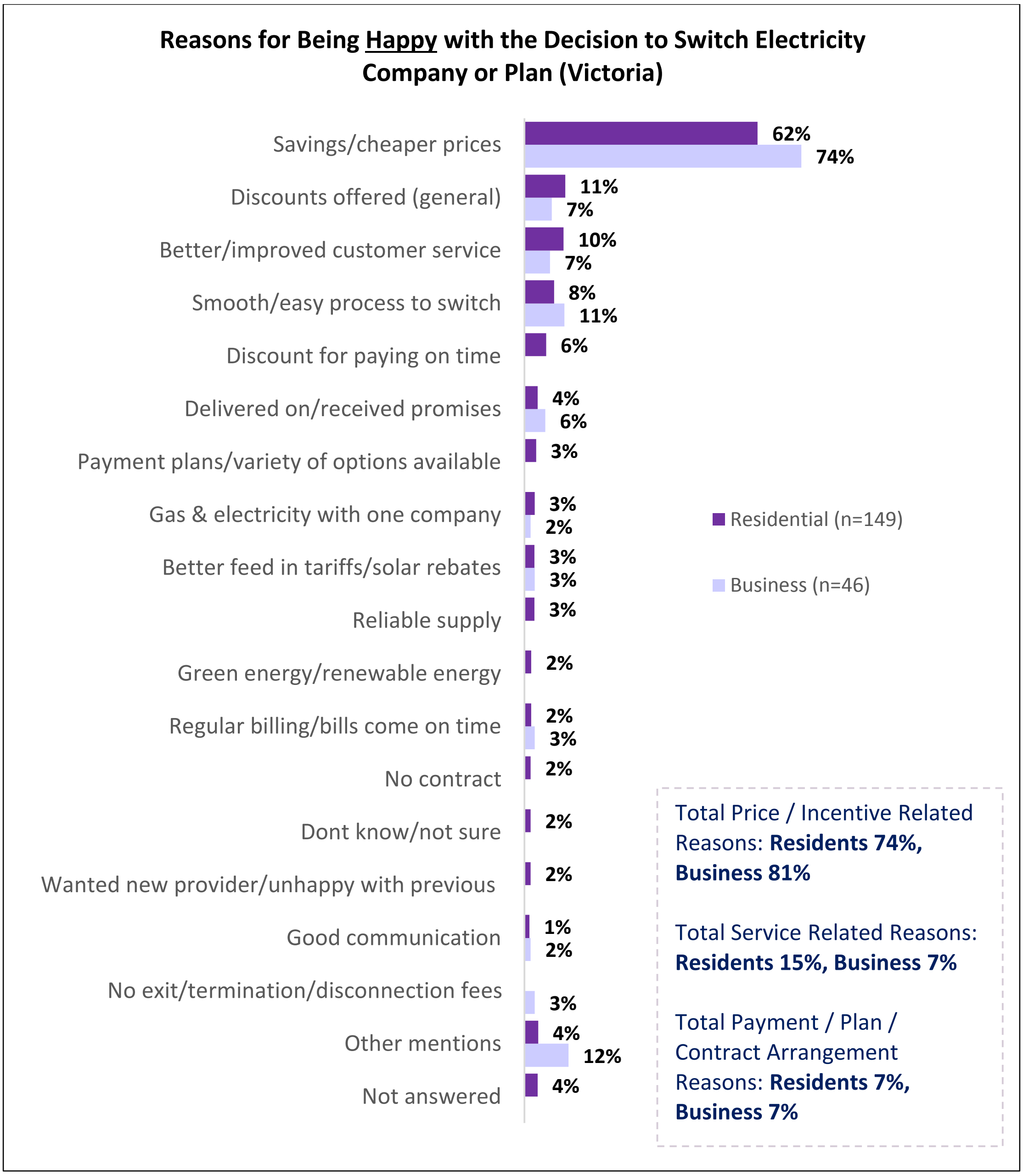
Satisfaction with Switching



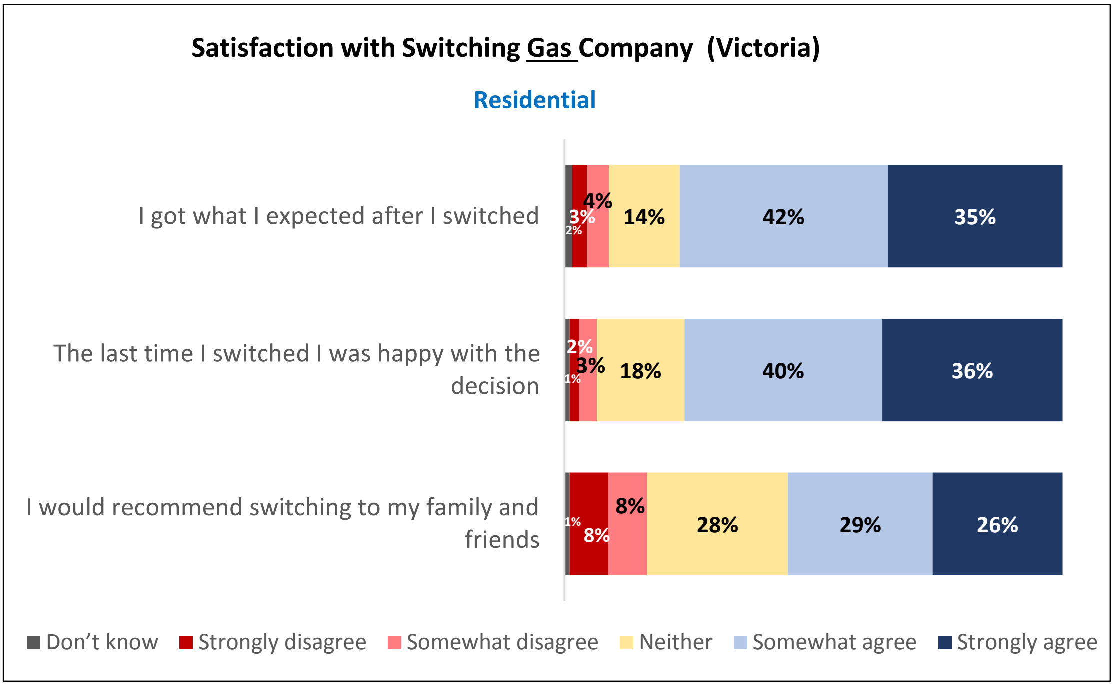
Base: Respondents who had switched their electricity company or plan (Residential n=196)
Q50. And having switched your electricity company or plan, to what exte4t do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



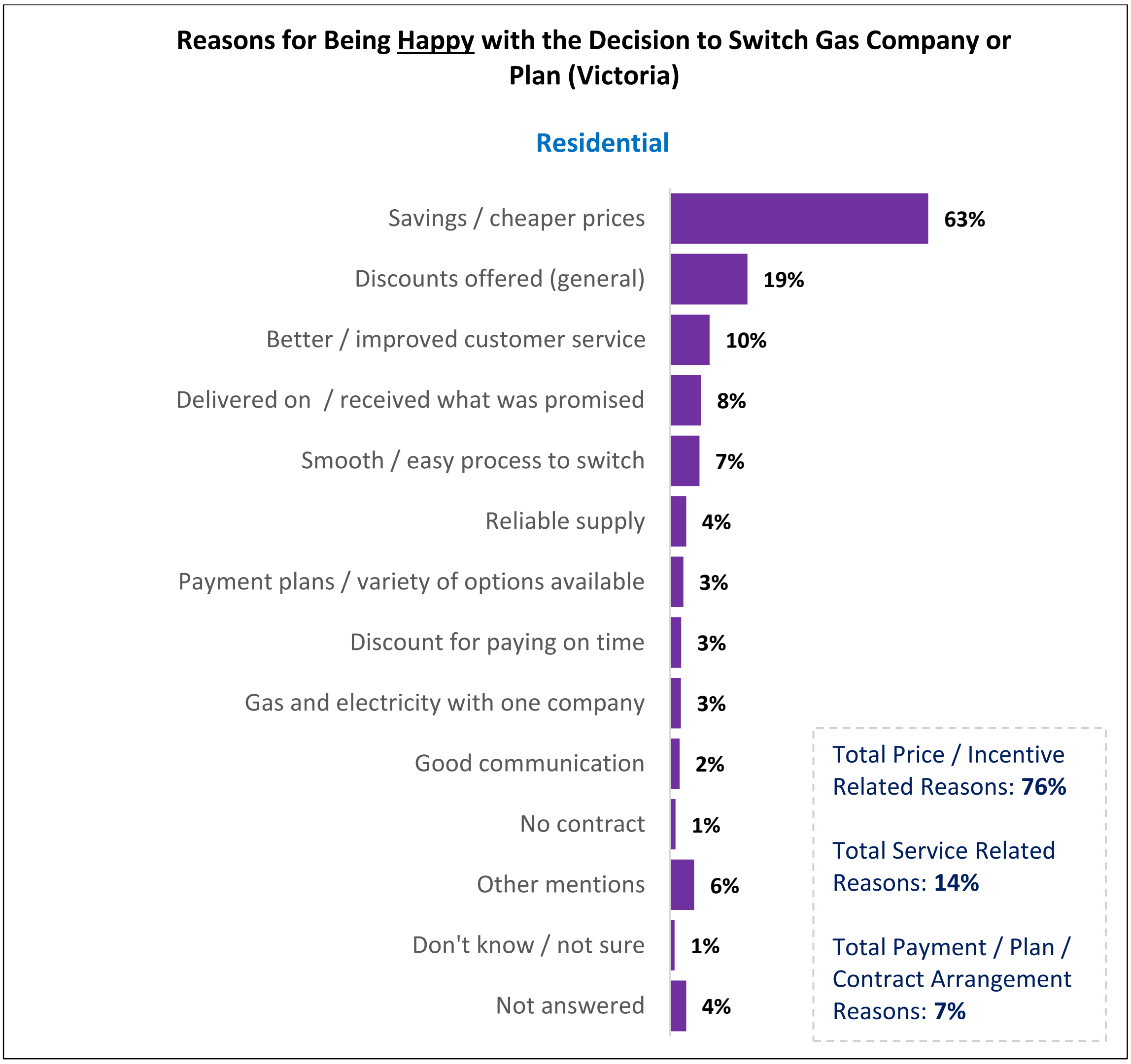
Base: Respondents who had switched their electricity company or plan (Business n=58)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



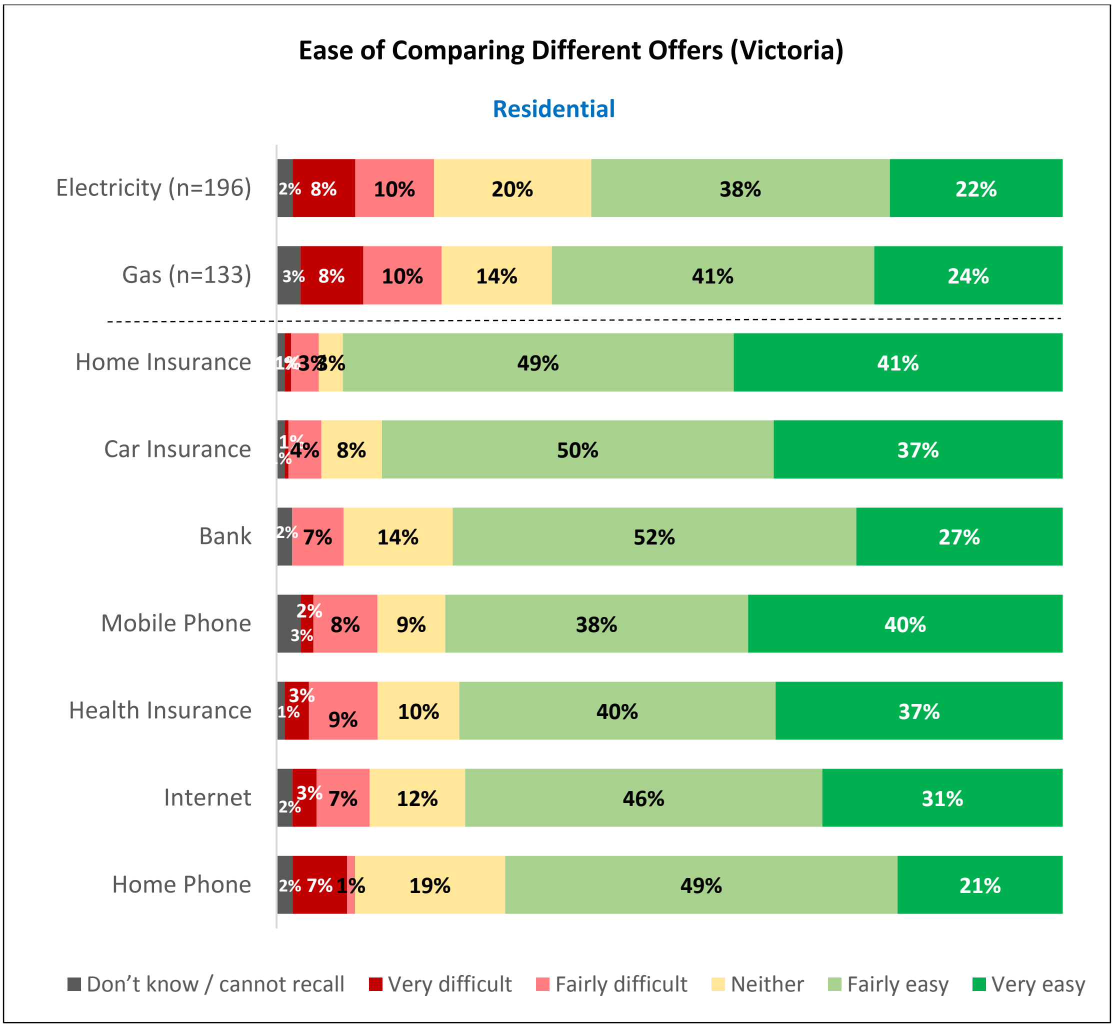
Base: Respondents who agreed they were happy with their decision to switch electricity company or plan
Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE



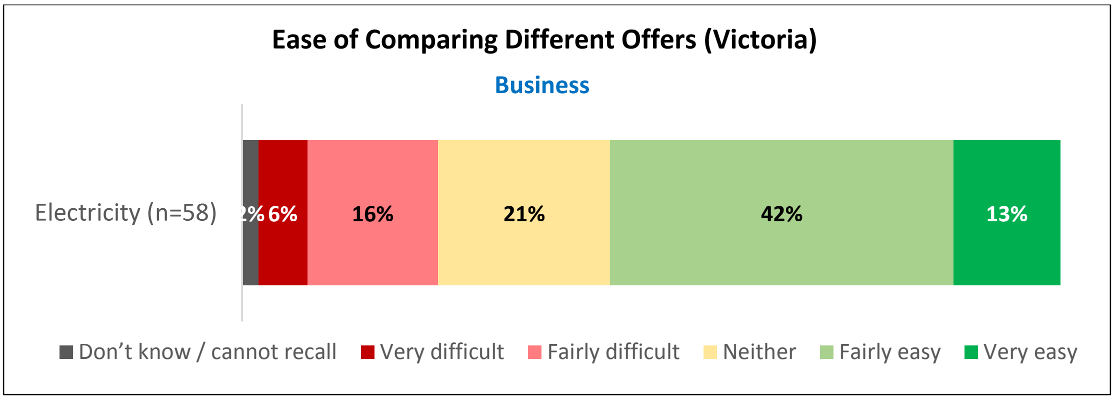
Base: Respondents who had switched their gas company or plan (Residential n=133). NB: Business results not shown due to small sample size (n=7)
Q55. And having switched your gas company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



Base: Respondents who agreed they were happy with their decision to switch gas company or plan (n=102). Business results not shown due to small base size (n=5)
Q30B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE

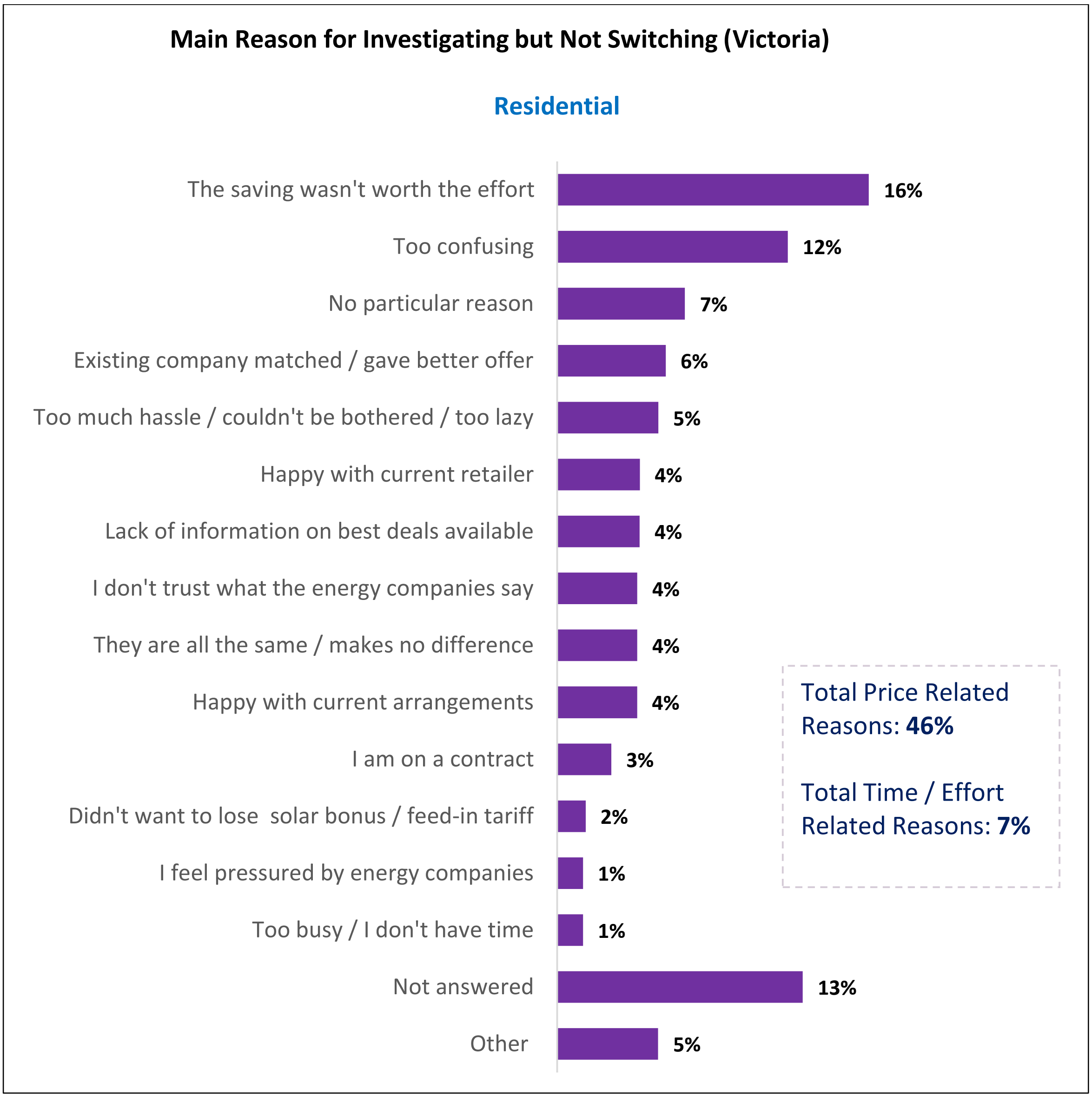


Base: Respondents who switched their company / provider or plan
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / D7a. The last time you changed your [INSERT FROM D7] provider, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

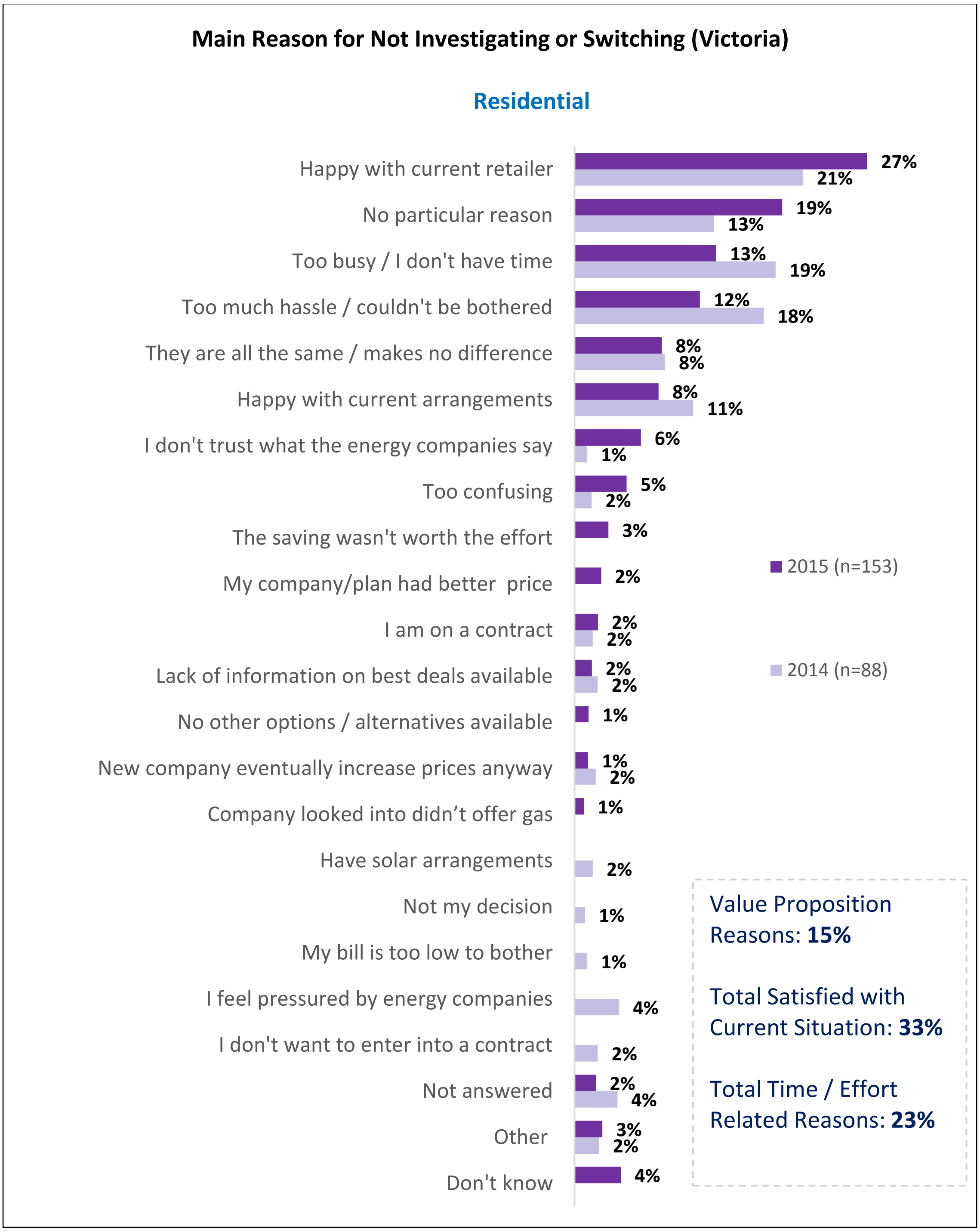


Base: Respondents who switched their company / provider or plan. NB: Gas results not shown due to small sample size (n=7)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

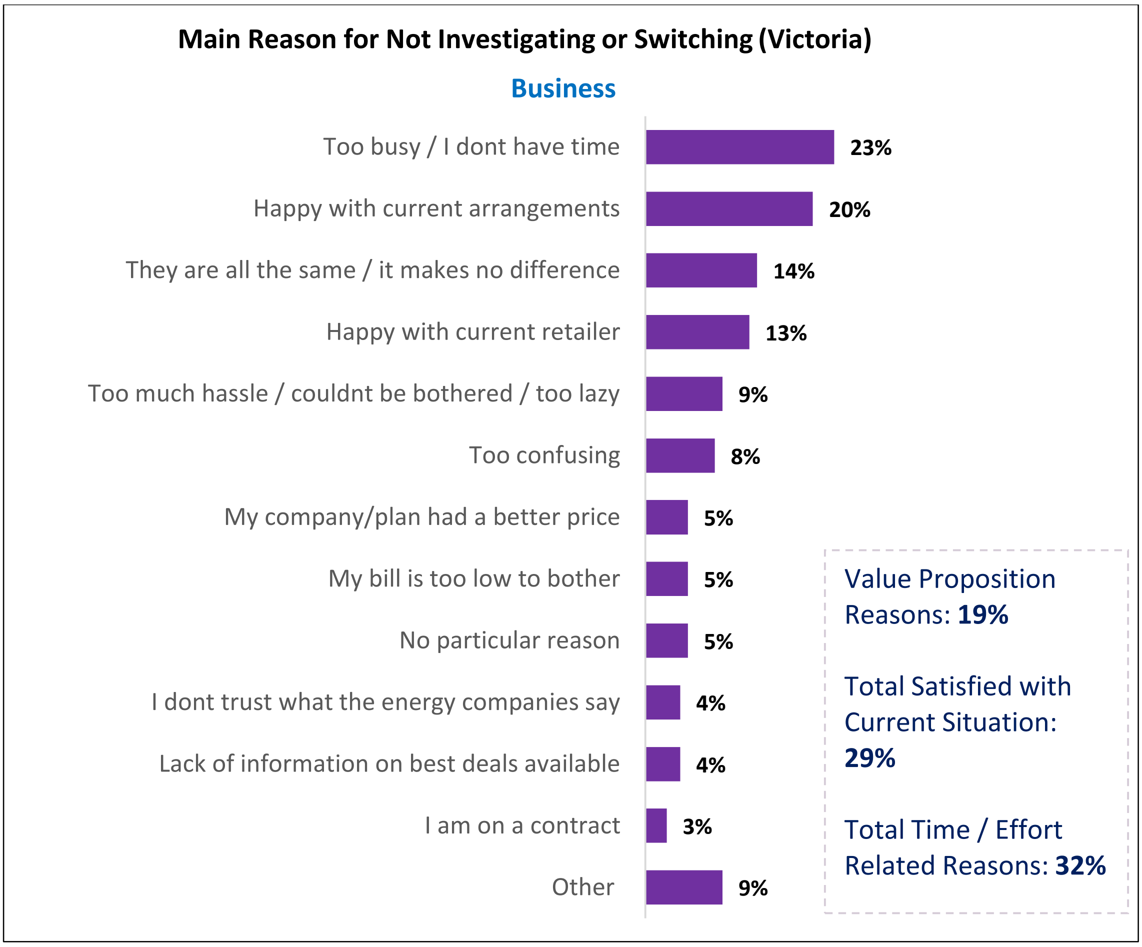
Barriers to Investigating Offers or Switching



Base: Respondents who investigated offers and options but haven't switched in the past 12 months (n=48). NB. Business results not shown due to small sample size (n=9)
Q32. And what was the main reason why you investigated different offers and options but haven't changed your energy company or plan in the last 12 months? Any others? MULTIPLE RESPONSE

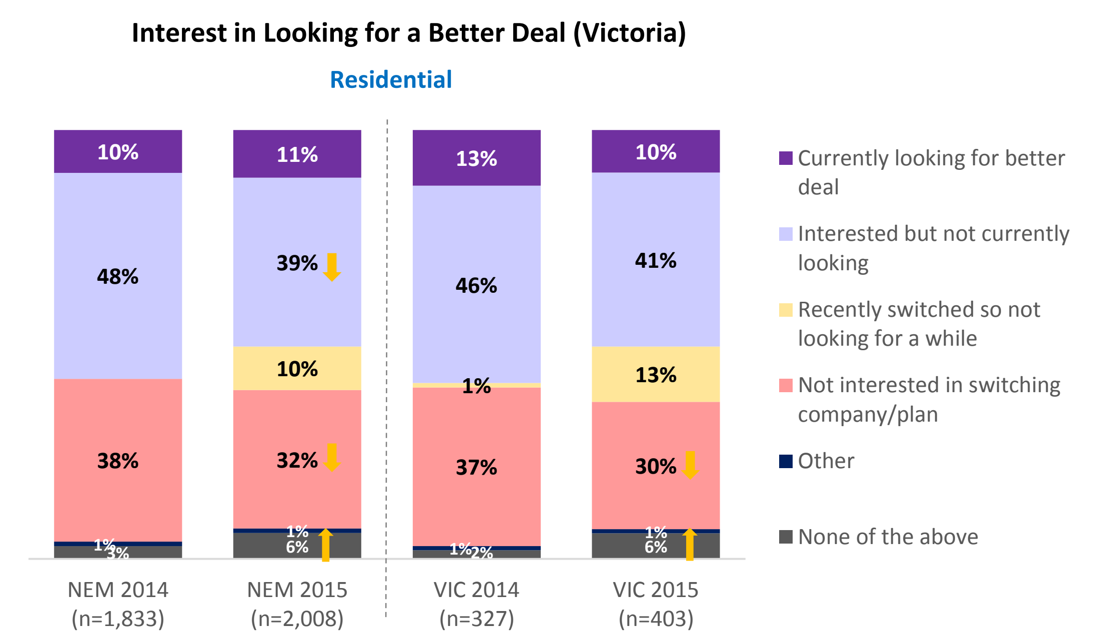


Base: Respondents who had not investigated offers and options or switched in the past 12 months Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons? MULTIPLE RESPONSE

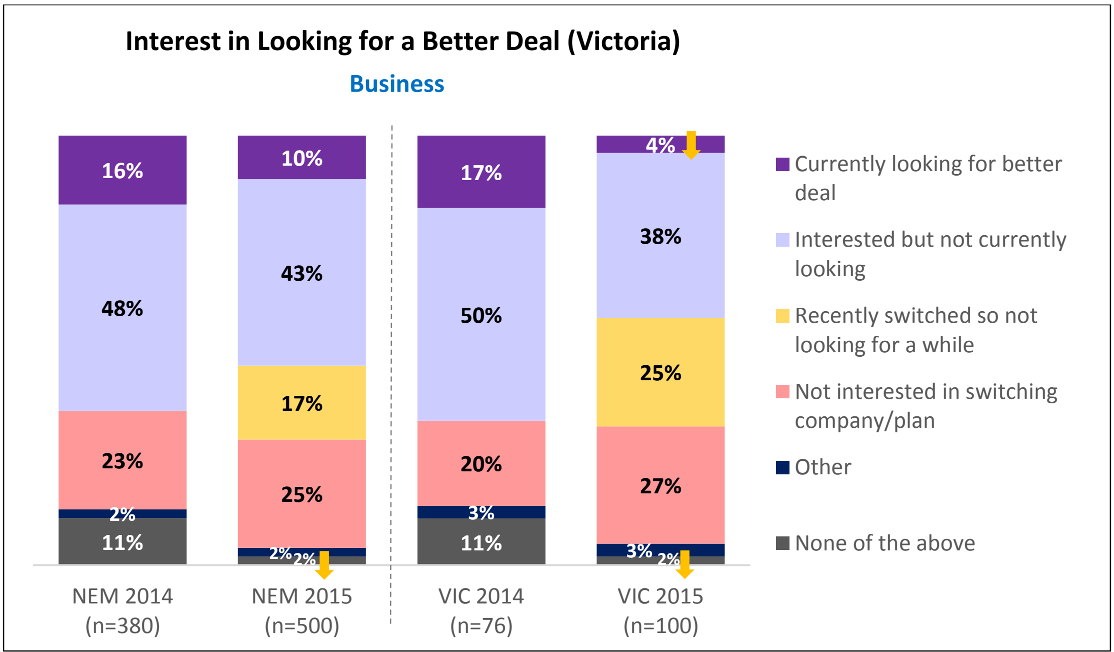


Base: Respondents who had not investigated offers and options or switched in the past 12 months (n=31). NB: 2014 results not shown due to small sample size (n=9)
Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons? MUTLIPLE RESPONSE

Switching Intentions and Attitudes



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household? (NB: in 2014 the open-ended responses from 'other' were back coded to show those who had indicated they were 'not looking for a while because they had recently switched'. Results should not be compared directly as this option was not prompted in 2014).



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=2,008)	Victoria (n=403)
Total	**$207**	**$201**
Last Quarterly Electricity Bill: Less than $300	$178	$182
Last Quarterly Electricity Bill: $300-$500	$210	$193
Last Quarterly Electricity Bill: $500 or more	$247	$263

Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Business	
	NEM (n=500)	Victoria (n=100)
Total	**$609**	**$366**
Last Quarterly Electricity Bill: Less than $500	$257	$262
Last Quarterly Electricity Bill: $500-$999	$462	$417
Last Quarterly Electricity Bill: $1,000 or more	$1,117	$517

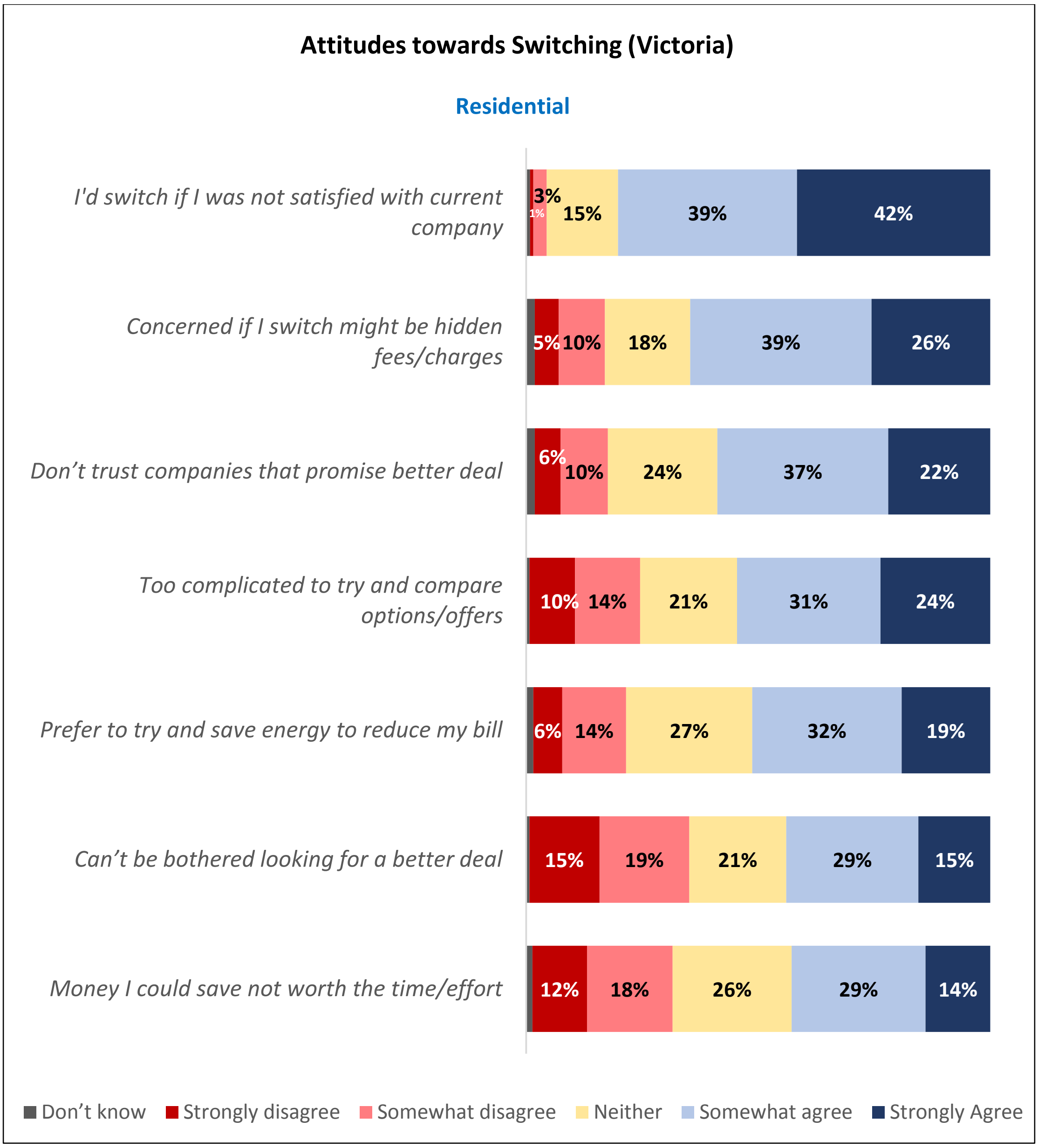
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=908)	Residential (n=329)
Total	**$162**	**$169**
Last Quarterly Gas Bill: Less than $100	$120	$139
Last Quarterly Gas Bill: $100 - $300	$163	$163
Last Quarterly Gas Bill: $300 or more	$169	$187

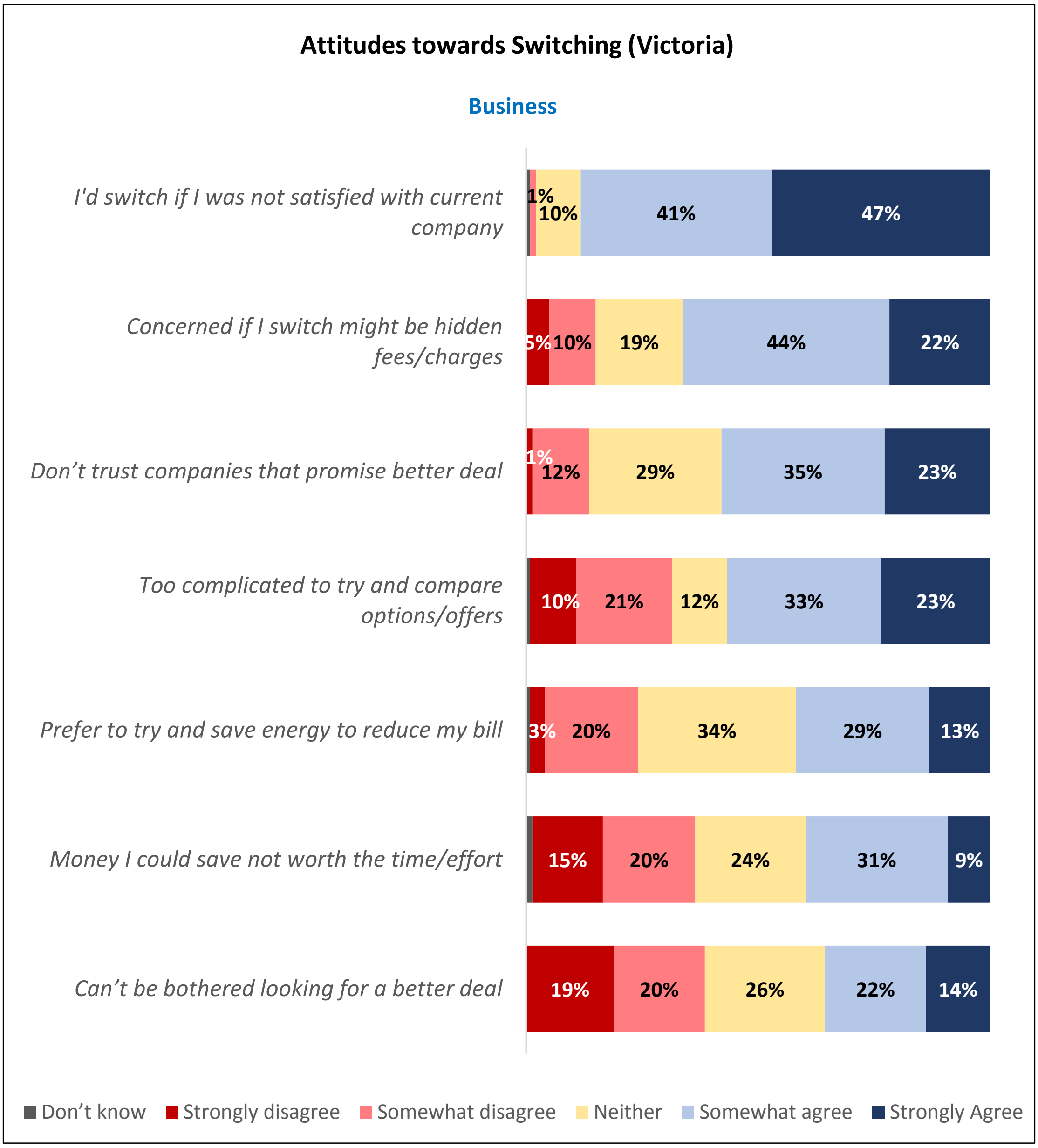
Base: Respondents with mains connected gas
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Business	
	NEM (n=101)	Business (n=38)
Total	**$249**	**$196**
Last Quarterly Gas Bill: Less than $160	$194	$177
Last Quarterly Gas Bill: $160-$349	$204	$184
Last Quarterly Gas Bill: more than $350	$382	$246

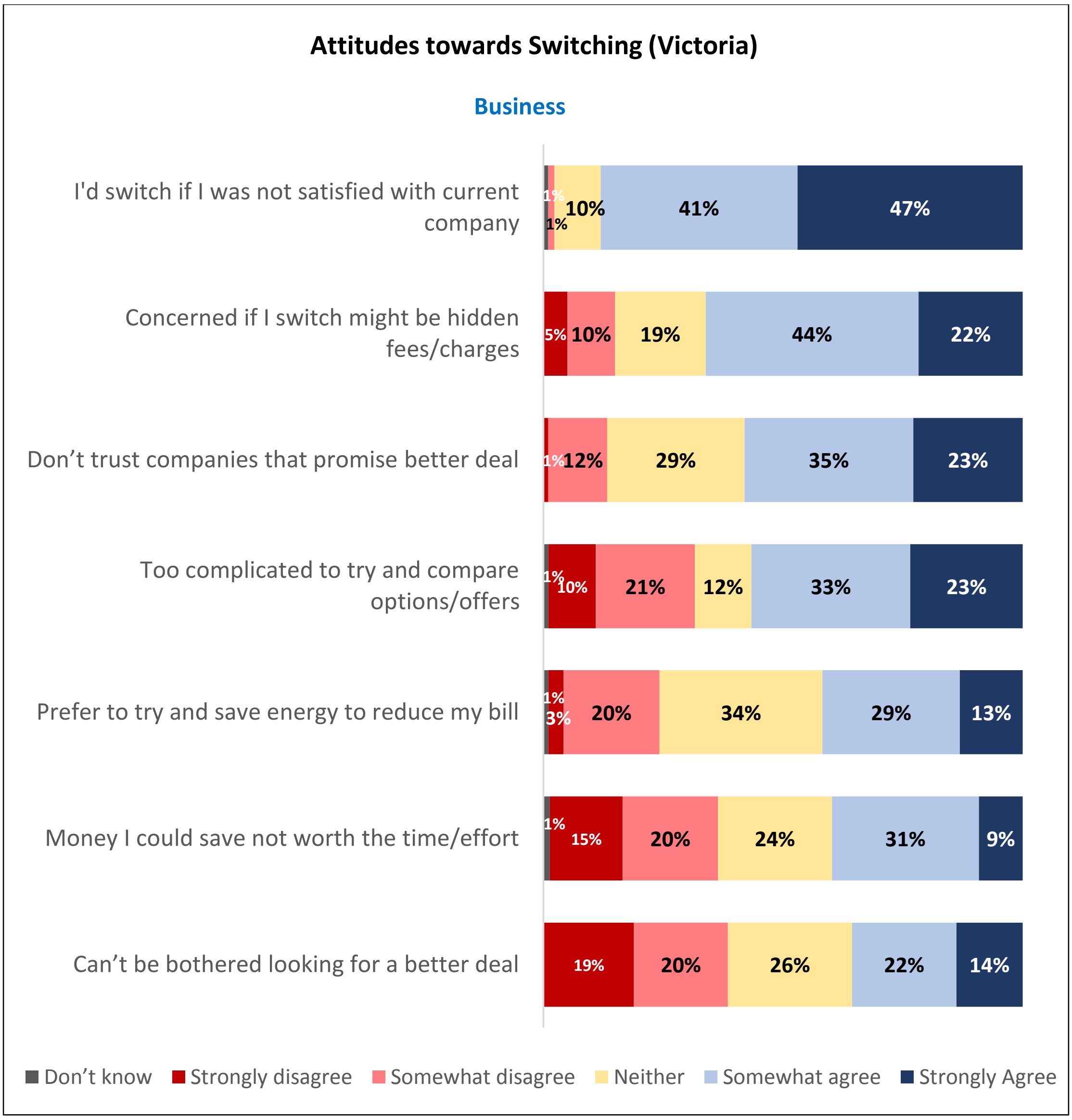
Base: Respondents with mains connected gas
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?



Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=100)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=100)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

1.2.3 Consumer Satisfaction with the Market

Summary of Findings

Overall levels of satisfaction with the level of market choice in Victoria remained consistent among residential consumers with almost two thirds being somewhat or very satisfied (63% in 2015 vs. 57% in 2014). Satisfaction among business consumers declined slightly in 2015 (51% vs. 64% in 2014), however this was not a statistically significant change.

Satisfaction with the level of market choice among consumers in Victoria was in line with the NEM average.

In considering the responses to this question it is important to keep in mind that results from the 2014 qualitative research in Victoria showed that most consumers did not think that having additional companies to choose from actually helped them. They equated competition to improved prices and service, and yet had seen little evidence of this.

Overall, levels of satisfaction with current energy providers were comparable with the NEM results and there were very few significant differences since 2014.

Electricity

Among residents, levels of satisfaction with their current electricity company remained fairly consistent overall (67% in 2015 vs. 64% in 2014) but there was a significant increase in the proportion who were very satisfied (35% in 2015 up from 26% in 2014). Satisfaction among small business consumers was lower than amongst residents but also remained fairly consistent with 2014 (61% either somewhat or very satisfied compared to 66% in 2014).

Around two thirds of residential consumers (67%) and just over half of small business consumers (53%) rated the overall quality of customer service provided by their electricity company quite highly (rating of 7 or more out of 10).

Among residential consumers, ratings of overall value for money were consistent with those given in 2014 (57% rated seven or more in 2015 vs. 52% in 2014). Although not statistically significant, ratings were slightly lower among small business consumers in 2015 (42% vs. 52% in 2014 rating a 7 or more out of 10).

Residents with solar panels gave significantly higher ratings of their electricity company.

Gas

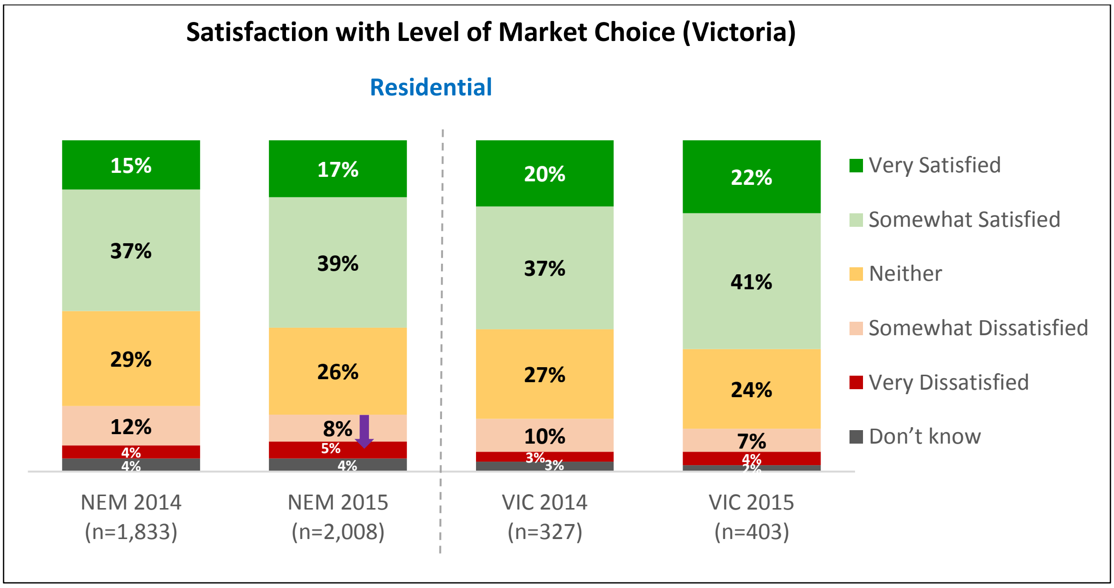
Seven in ten consumers (70% residential, 68% small business consumers) were very or somewhat satisfied with their current gas company. Around two thirds of residential consumers (66%) and over half of small business consumers (55%) rated the overall quality of customer service provided by their gas company quite highly (7 or more out of 10).

Consistent with 2014 results and in line with the NEM average, around six in ten residential consumers (61%) and half of business consumers (52%) rated the overall value for money provided by their gas company quite highly.

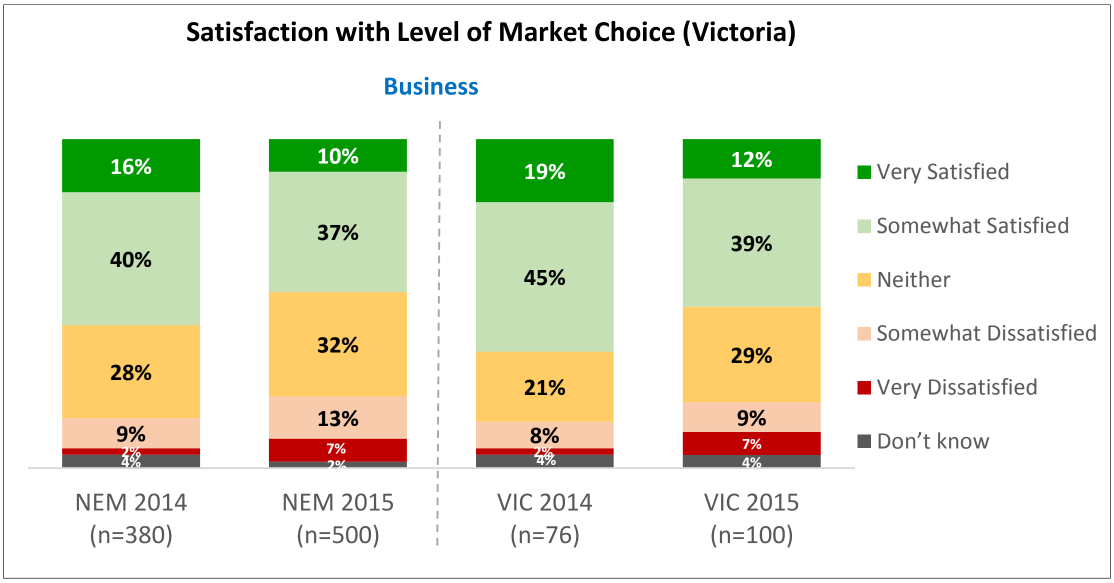
Residents with a special payment arrangement and, like they did with their electricity company, those who have solar panels gave significantly higher ratings of their gas company.

The Results

Satisfaction with Level of Choice

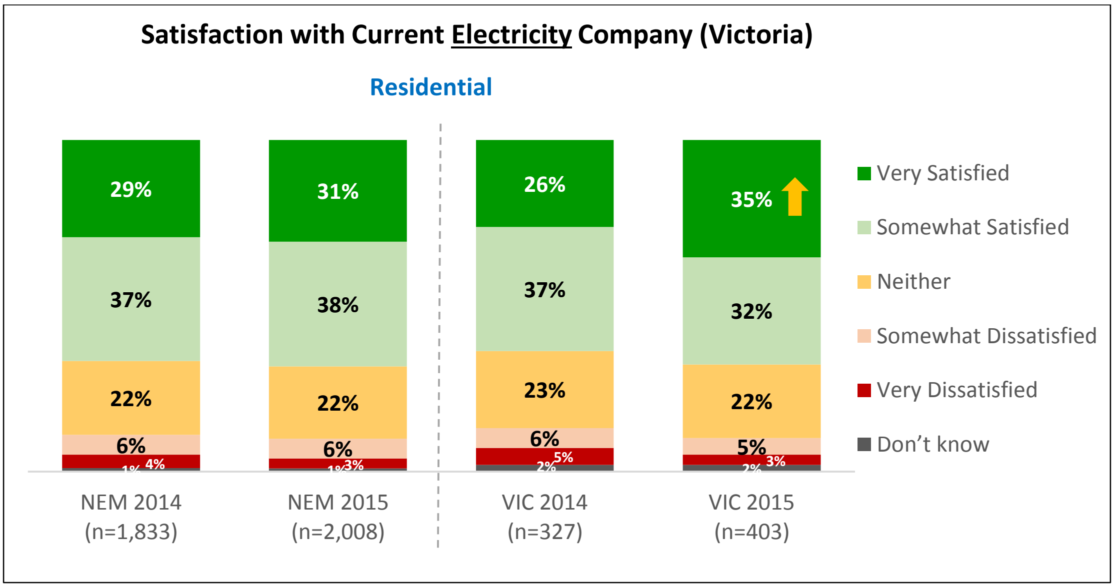


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

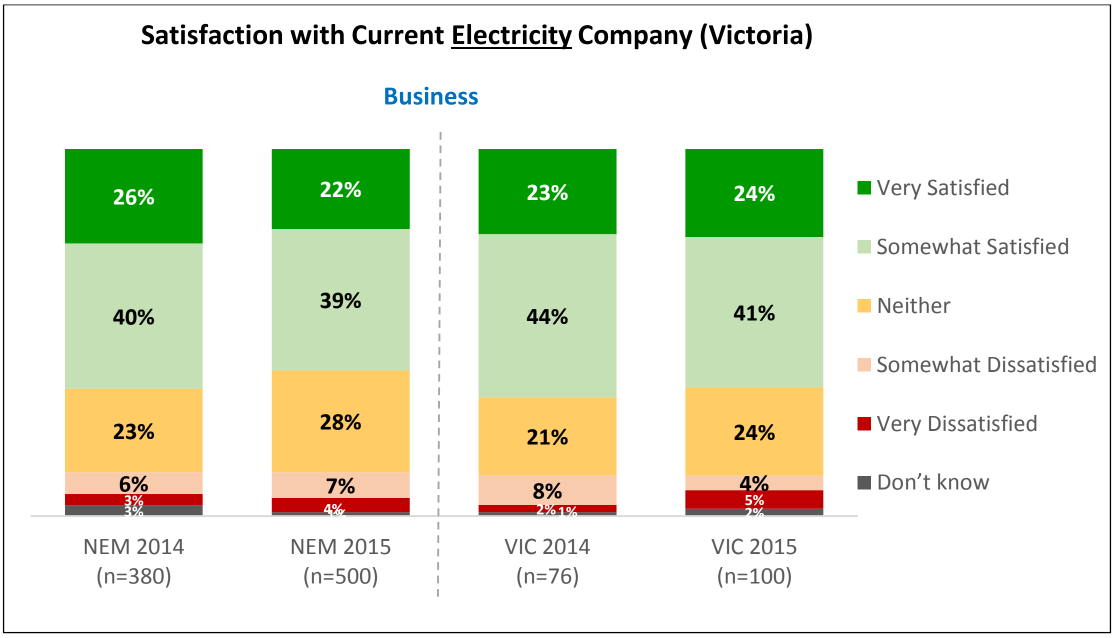


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

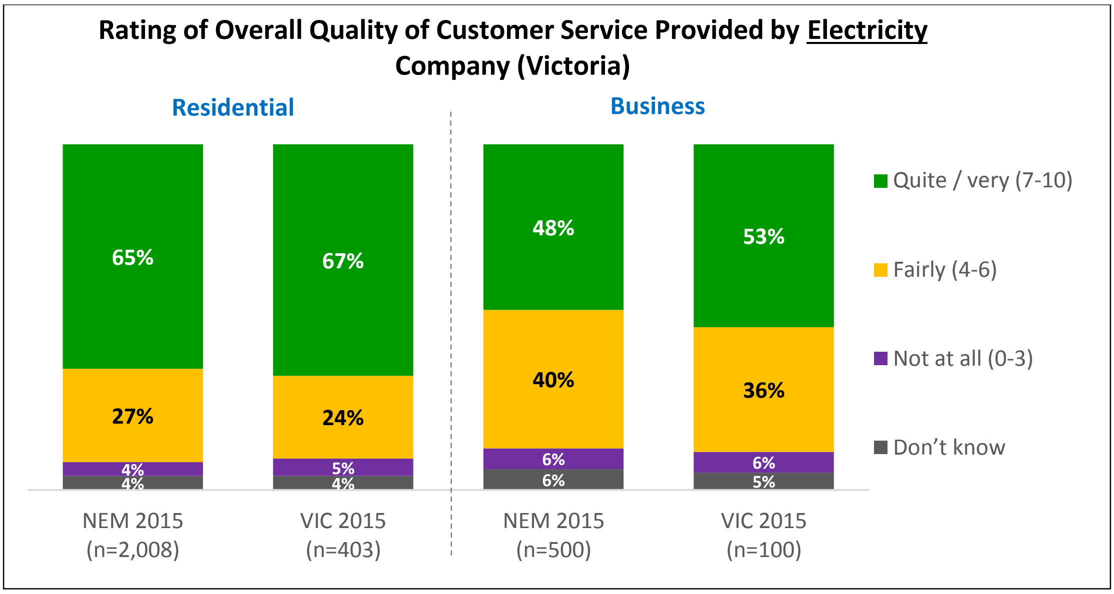
Satisfaction with Electricity Companies



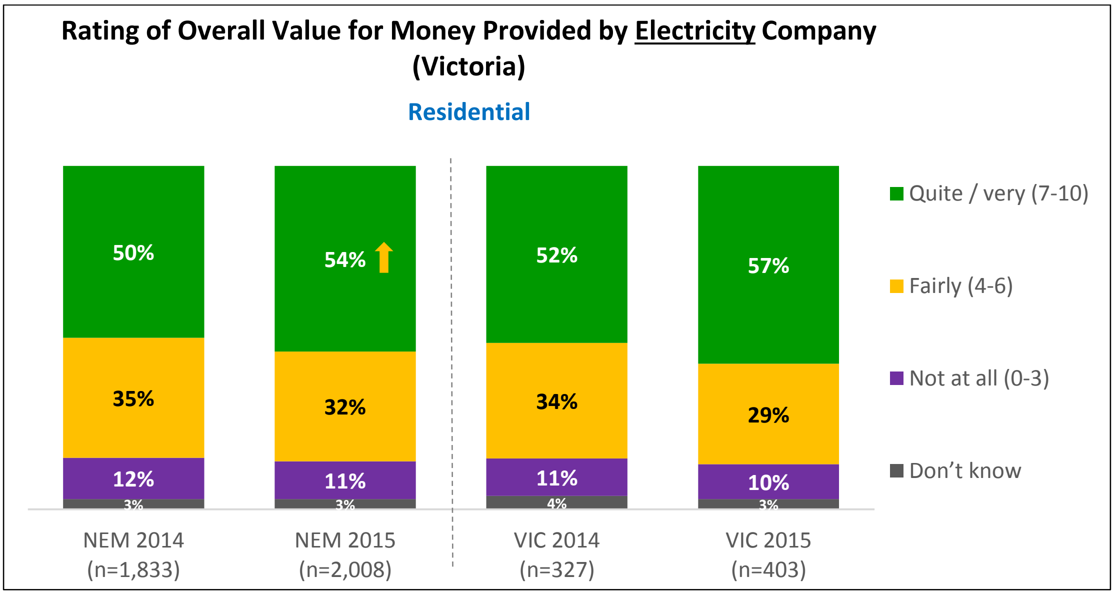
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



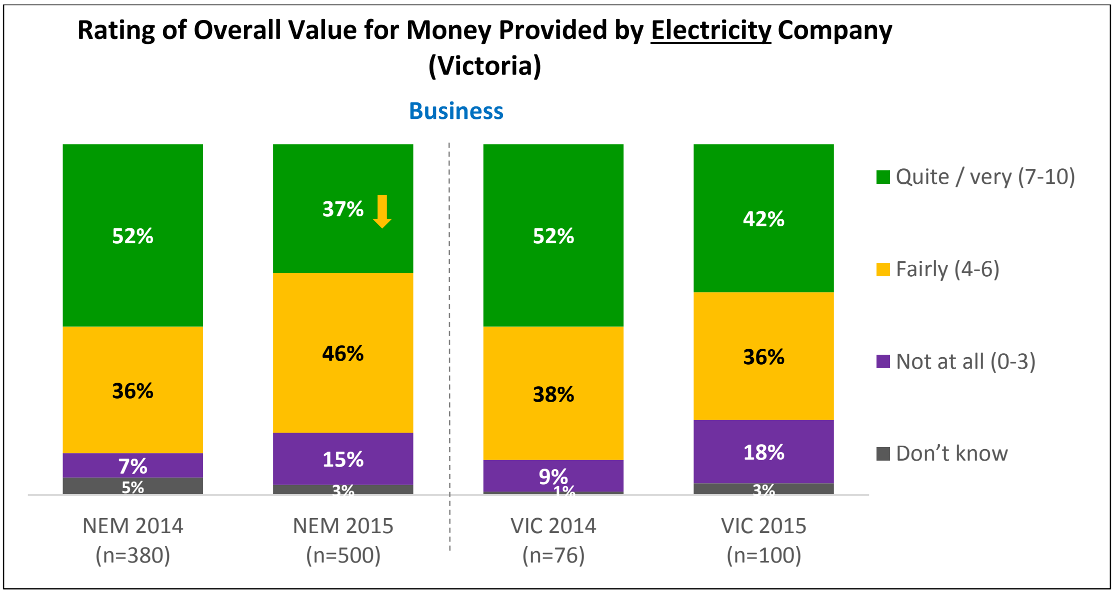
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



Base: All Respondents (n=403)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

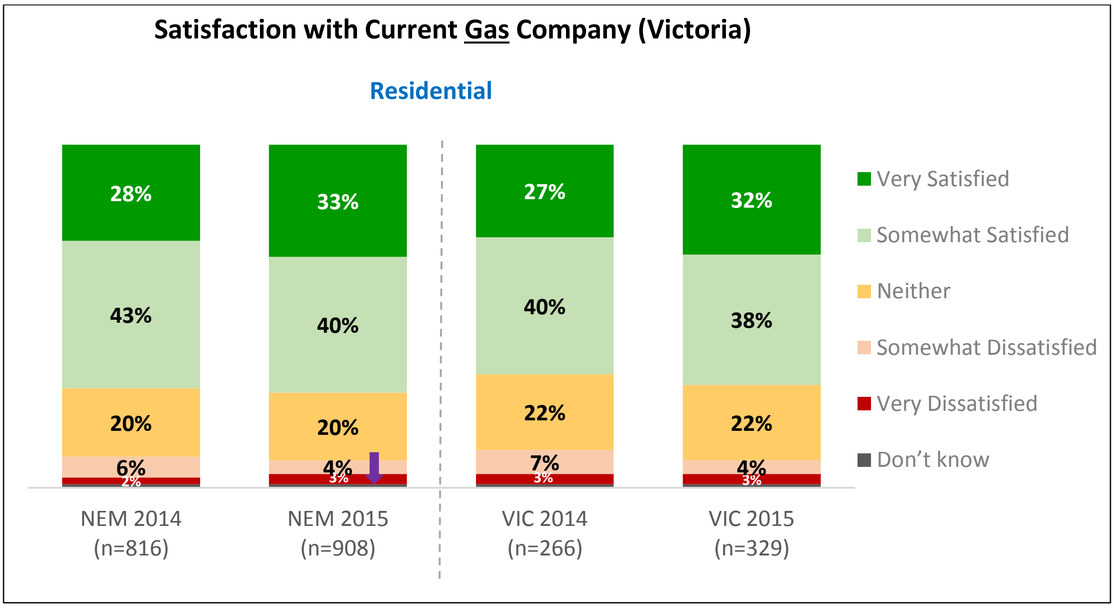


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

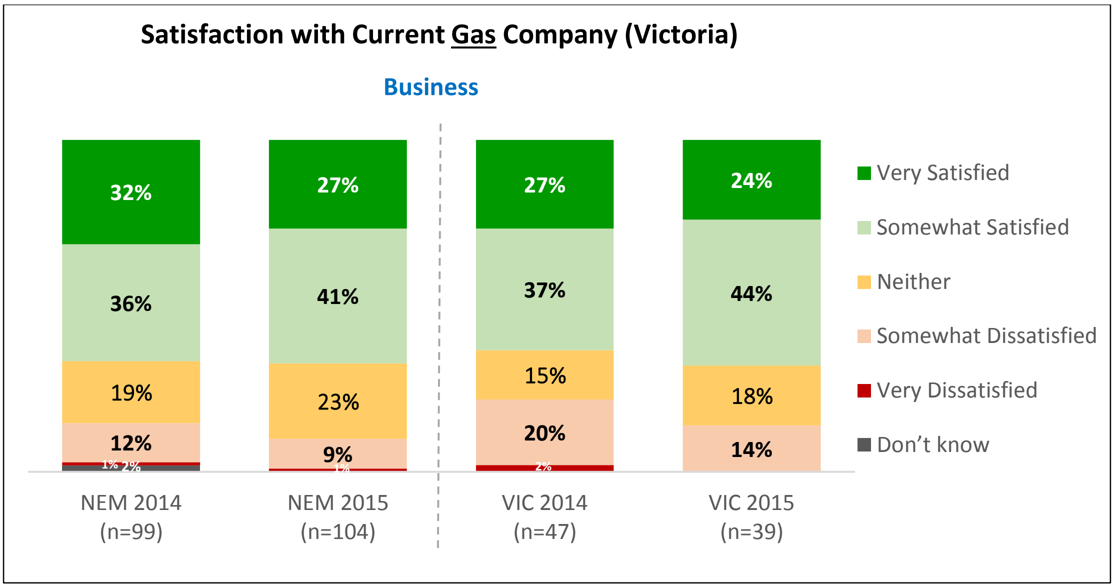


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

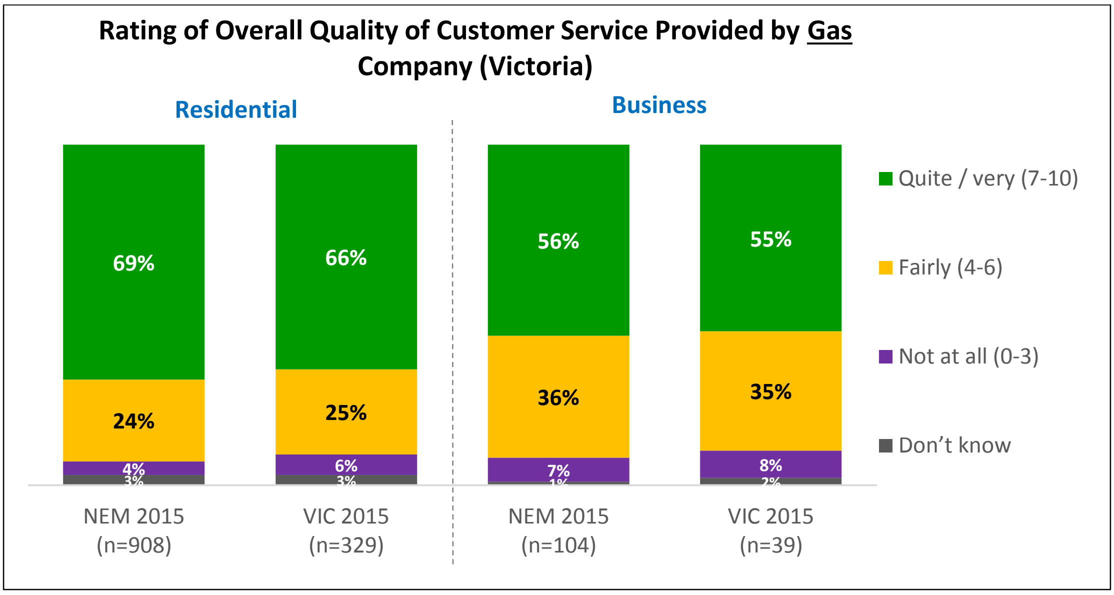
Satisfaction with Gas Companies



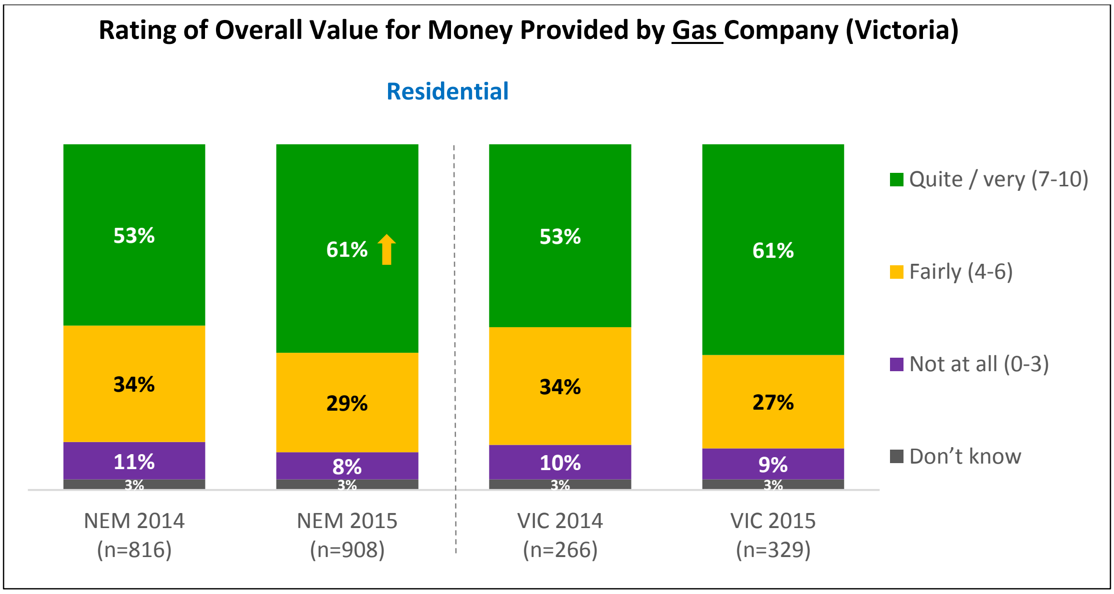
Base: All Respondents with mains connected gas
Q7. And how satisfied are you with your current gas company?



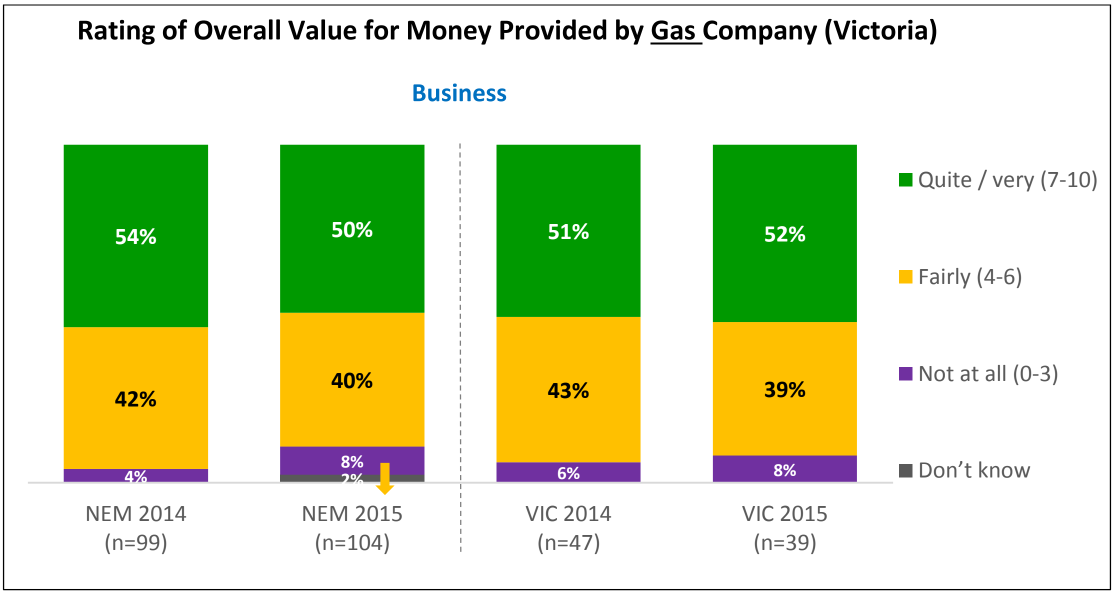
Base: All Respondents with mains connected gas
Q7. And how satisfied are you with your current gas company?



Base: All Respondents
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.



Base: All Respondents with mains connected gas
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?



Base: All Respondents with mains connected gas
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

1.2.4 Information Sources and Gaps

Summary of Findings

The internet remained the most used information source to help consumers switch energy company or plan or investigate offers for electricity (53% residential, 47% small business internet based sources in total) and gas (49% of residents). It was also the main information source used among residents who had investigated different options and offers but had not switched (65%).

In 2015, survey respondents were also asked which information source they thought was most useful for switching energy company or plan or for investigating offers. Among switchers internet based sources were most useful (41% residential, 45% small business for electricity, 34% residential for gas) followed by looking at the best price or saving (9% residential, 16% small business for electricity, 17% residential for gas). Around one in ten also found direct contact with an energy company to be the most useful source (11% residential, 13% small business for electricity, 11% residential for gas). The relative usefulness of these information sources was the same among those who had investigated offers or options but had not switched.

When prompted, almost half of consumers who had switched electricity company or plan (46% residential, 47% small business) and around one in four residential consumers who had switched gas company or plan (44%) said they had used a price fact sheet to understand the details of the electricity offer when they switched. Just 2% of residents who switched gas mentioned using a price fact sheet without being prompted. Nearly four in ten residential consumers who had investigated offers but not switched company or plan had used a price fact sheet (37% when prompted).

Consistent with 2014 and with other NEM jurisdictions the most preferred information sources for finding information about different energy retailers and plans in general were also internet based sources (72% of residents, 80% of small business consumers).

When it comes to confidence in finding the right information to choose a suitable energy plan, around six in ten residential consumers (58%) and half of business consumers (50%) were quite or very confident (rating 7 or more out of 10). This result is fairly consistent with the NEM average. Further analysis shows that:

- Residential consumers with higher confidence levels included: those aged 18 to 34 years, those with solar panels, those who had switched energy company or plan in the last 12 months, those who had been approached by an energy company and those who had actively investigated offers and options.
- Consistent with other NEM jurisdictions there is a strong relationship between confidence in choosing the right energy offer and confidence in finding the right information (correlation of 0.67).

When considering confidence in finding the right information it is important to note that the 2014 qualitative research suggested that confidence levels tended to be overstated.

Unprompted awareness of comparison websites among residents declined significantly among residents in 2015. Around a third of consumers (30% in 2015 up from 20% in 2014) could not name any comparison sites at all and a further 4% were aware there were comparison sites but could not recall any specific names. iSelect was the most commonly mentioned comparison site (18%) followed by Compare the Market (5%) Energy Watch (4% down significantly from 9% in 2014), Choosi (3%) and GoSwitch (3%).

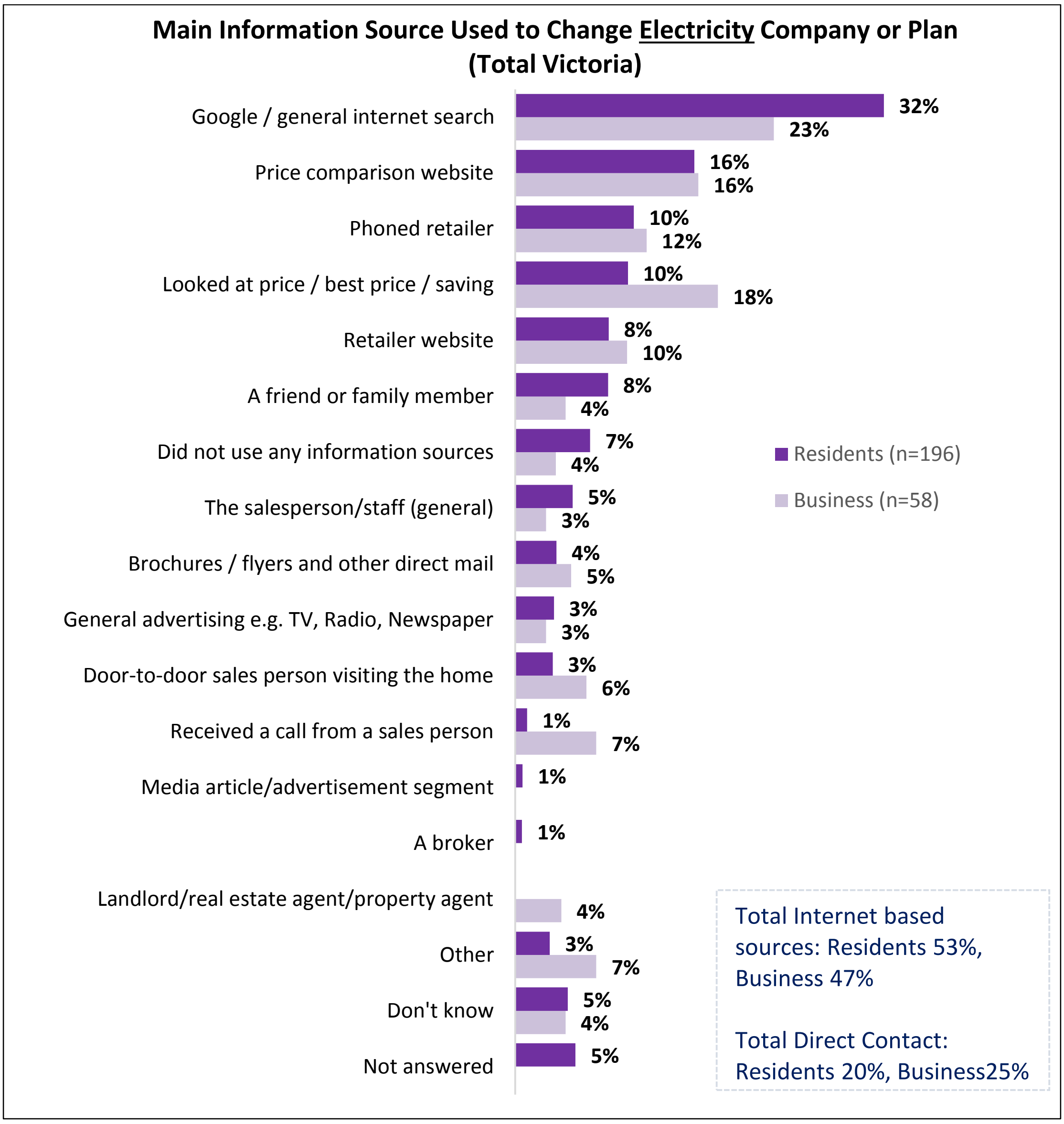
Although not statistically significant, unprompted awareness of comparison websites among small business consumers also declined in 2015. Around half (51% in 2015 up from 38% in 2014) could not name any comparison sites at all and a further 5% were aware there were comparison sites but could not recall any specific names. As with residents, iSelect was the most commonly mentioned comparison site among small business consumers (30%). A smaller proportion of consumers also recalled Energy Watch (11%), Compare the Market (5%) and Choosi (4%).

Consistent with 2014 findings, when prompted, around three in ten consumers (29% residential, 31% small business consumers) had heard of the Your Choice Comparator website. Without prompting, just 1% of residential consumers and 4% of small business consumers had heard of it.

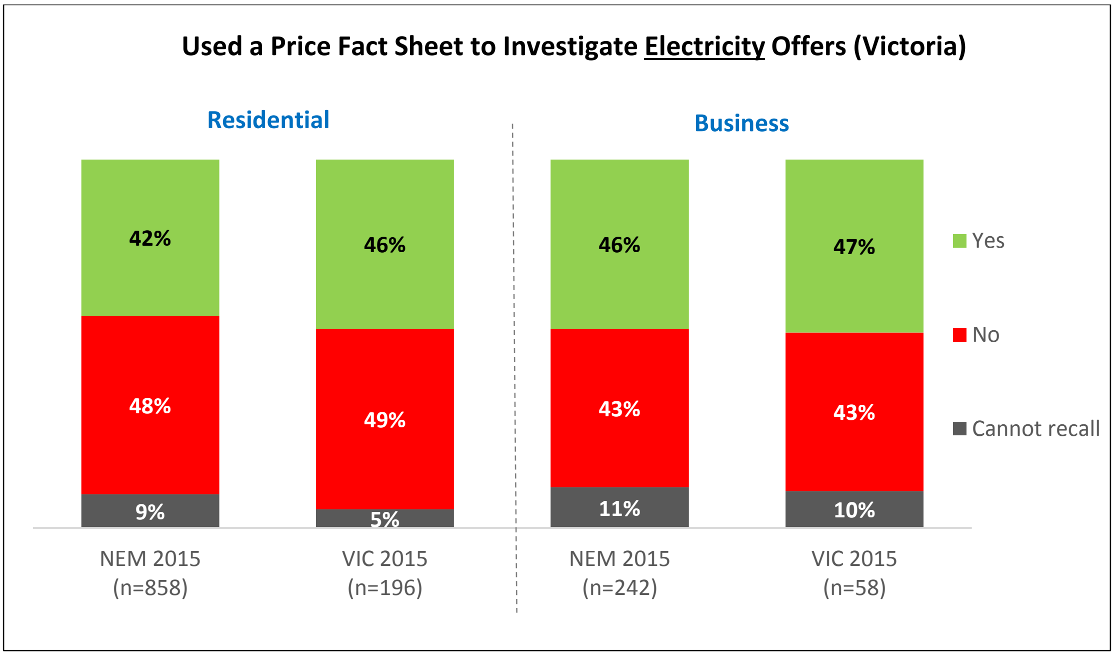
In 2015 significantly more residents had heard of the comparator website My Power Planner when prompted (18% up from 8% in 2014). By contrast, significantly less small business consumers had heard of it (11% down from 23% in 2014).

The Results

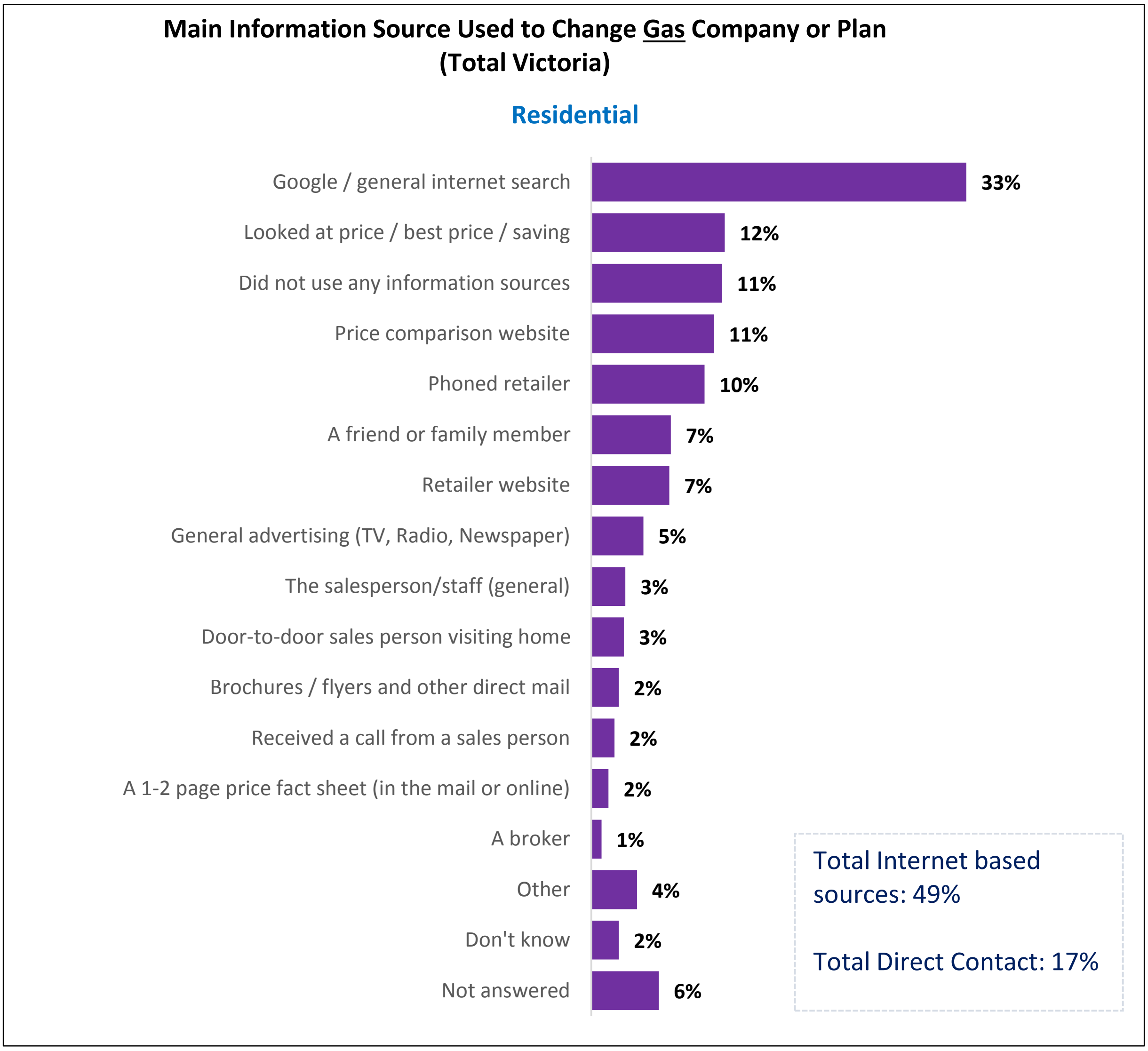
Information Sources Used to Investigate Offers or Switch



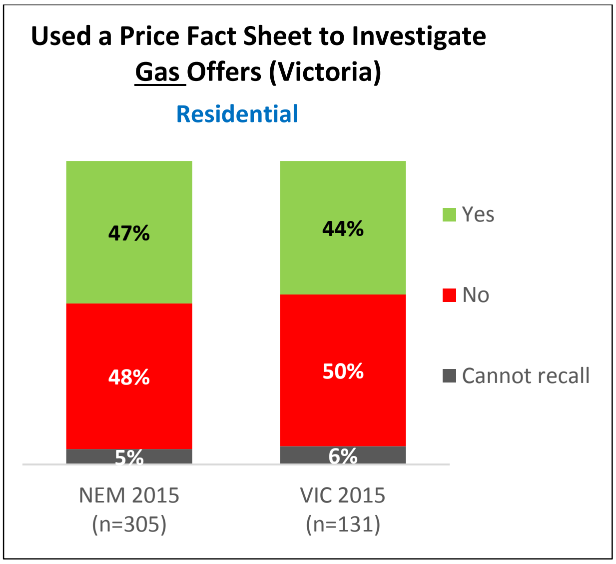
Base: Respondents who had switched electricity company or plan in the last five years
Q23. The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



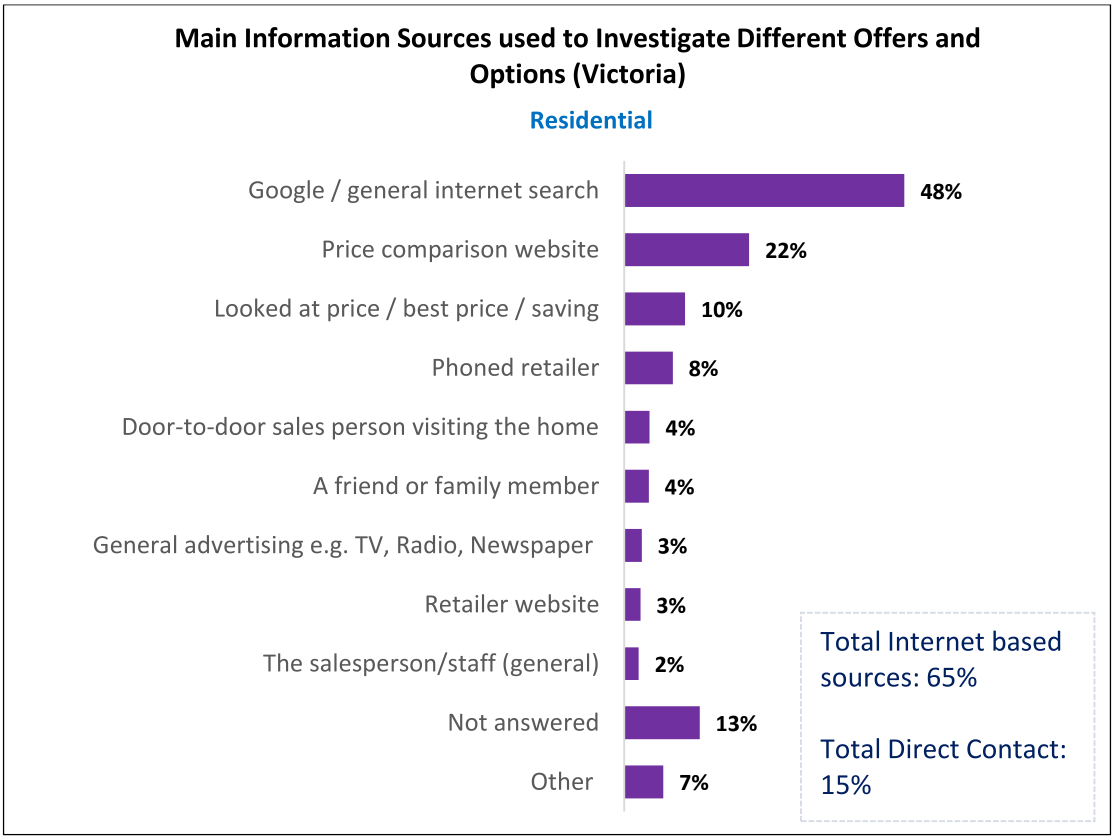
Base: Respondents who had switched electricity company or plan in the last five years
Q48. The last time you investigated changing your electricity company or plan, did you use a price fact sheet to understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.



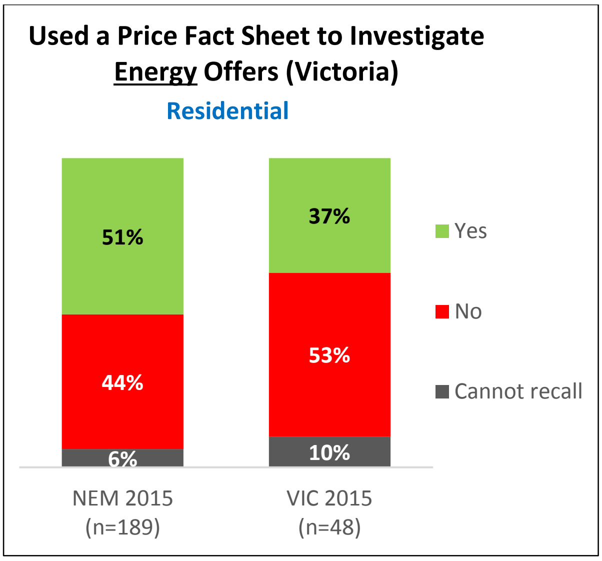
Base: Respondents who had switched gas company or plan in the past five years (n=133). NB. Business results not shown due to small sample size (n=7)
Q28. The last time you changed your gas company or plan, what information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



Base: Respondents who had switched gas company or plan in the last five years. NB. Business results not shown due to small sample size (n=7)
Q53. The last time you investigated changing your gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

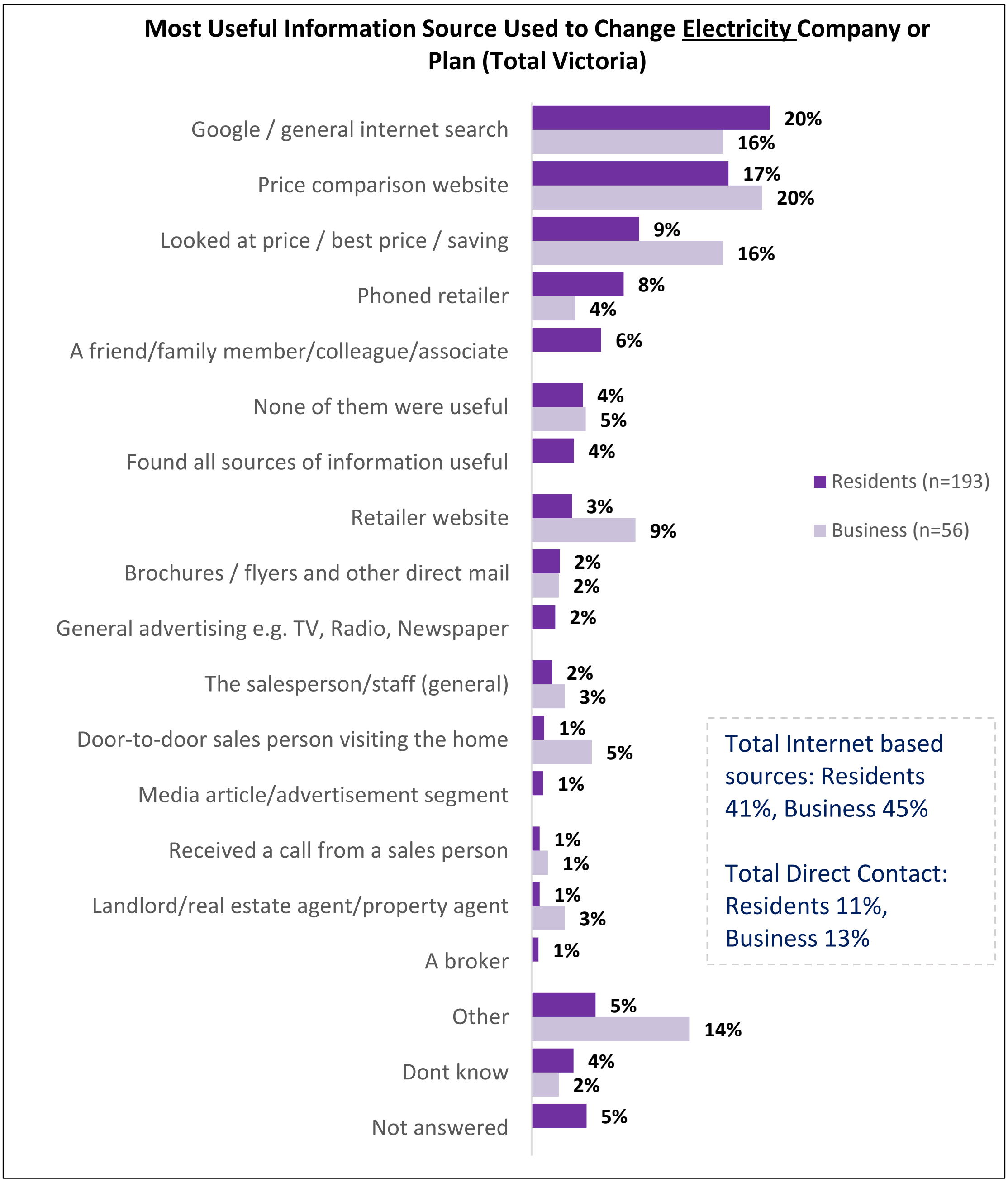


Base: Respondents who had investigates offers or options but had not switched (n=48). NB: 2014 results not shown due to small sample size (n=12), Business results not shown due to small sample size (n=9).
Q31. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your investigation? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE

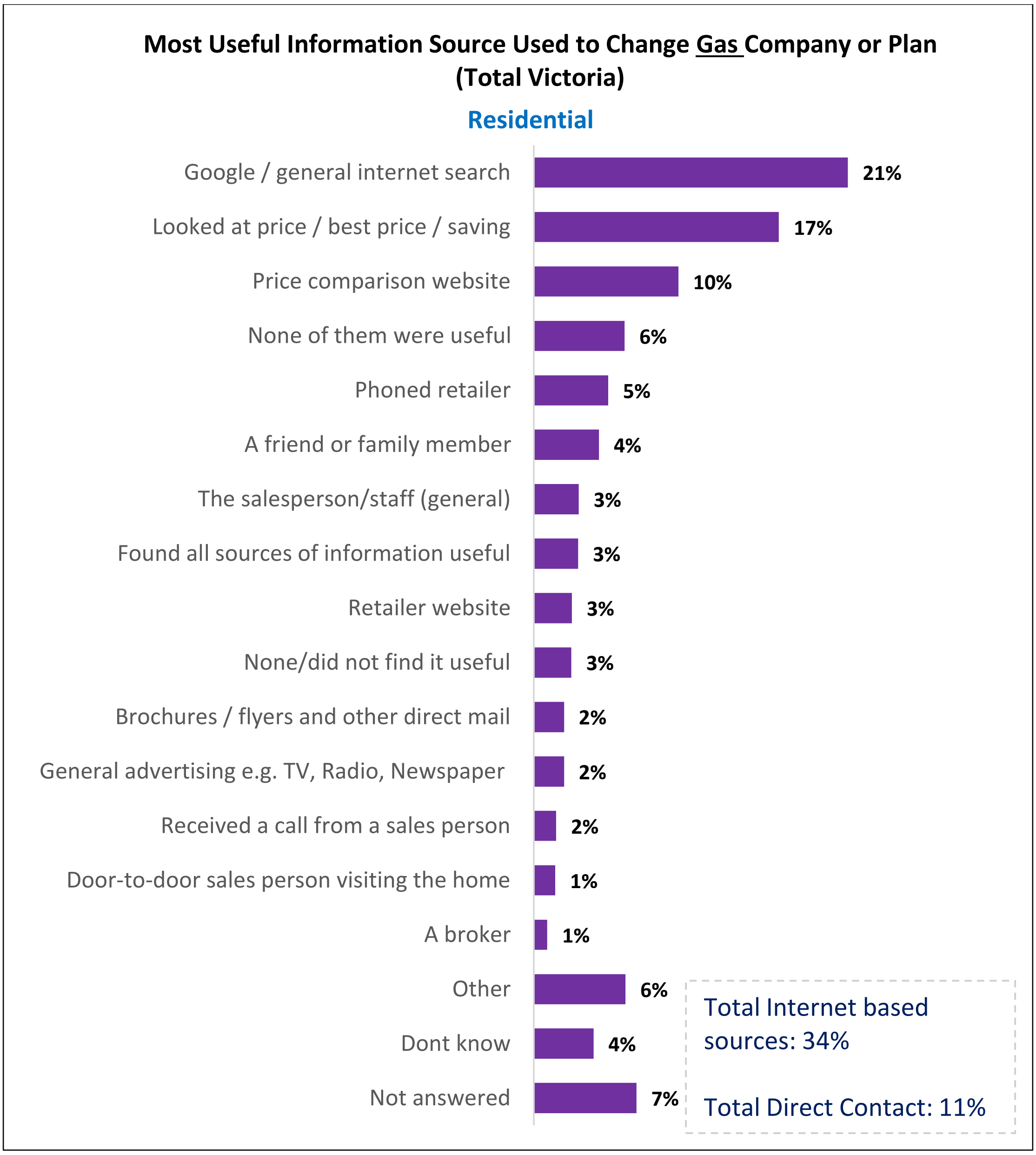


Base: Respondents who had investigates offers or options but had not switched. NB. Business results not shown due to small sample size (n=18).
Q58. The last time you investigated changing your electricity or gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

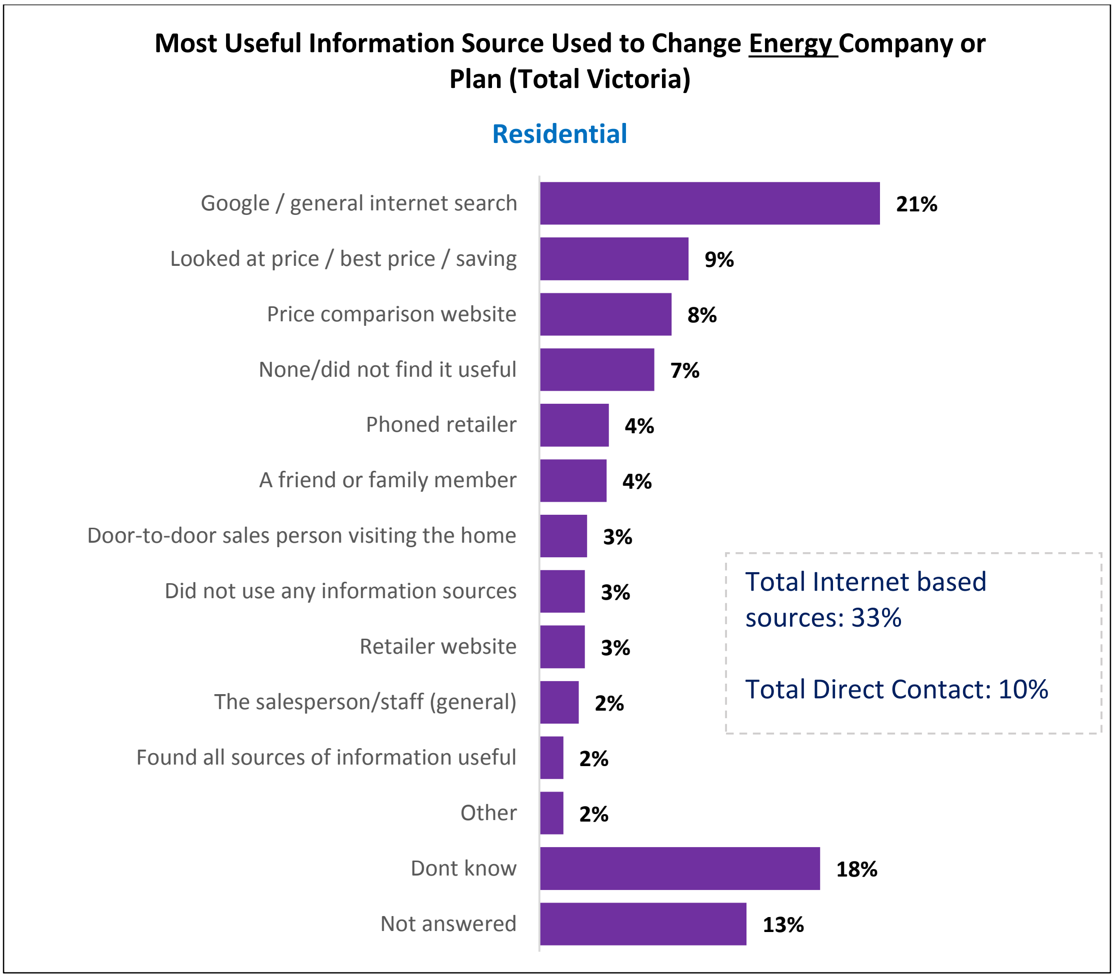
Most Useful Information Sources



Base: Respondents who had switched electricity company or plan in the last five years
Q47. And thinking about the information sources you used when changing your electricity company or plan, which one was most useful in helping with your decision to switch?

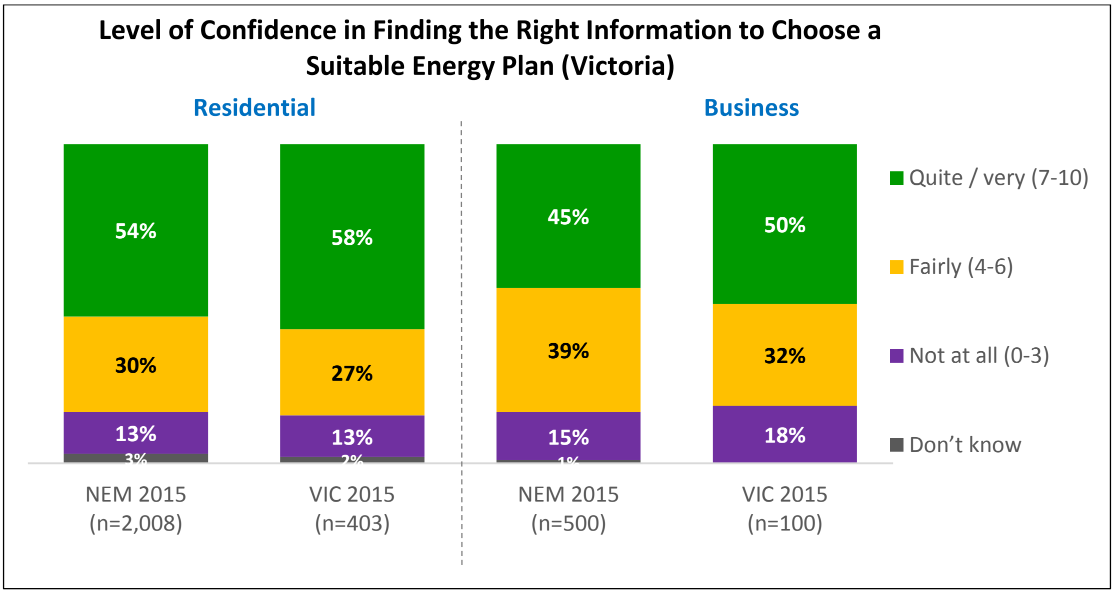


Base: Respondents who had switched gas company or plan in the last five years (n=131). Business results not shown due to small sample size (n=7).
Q52. And thinking about the information sources you used when changing your gas company or plan, which one was most useful in helping with your decision to switch?



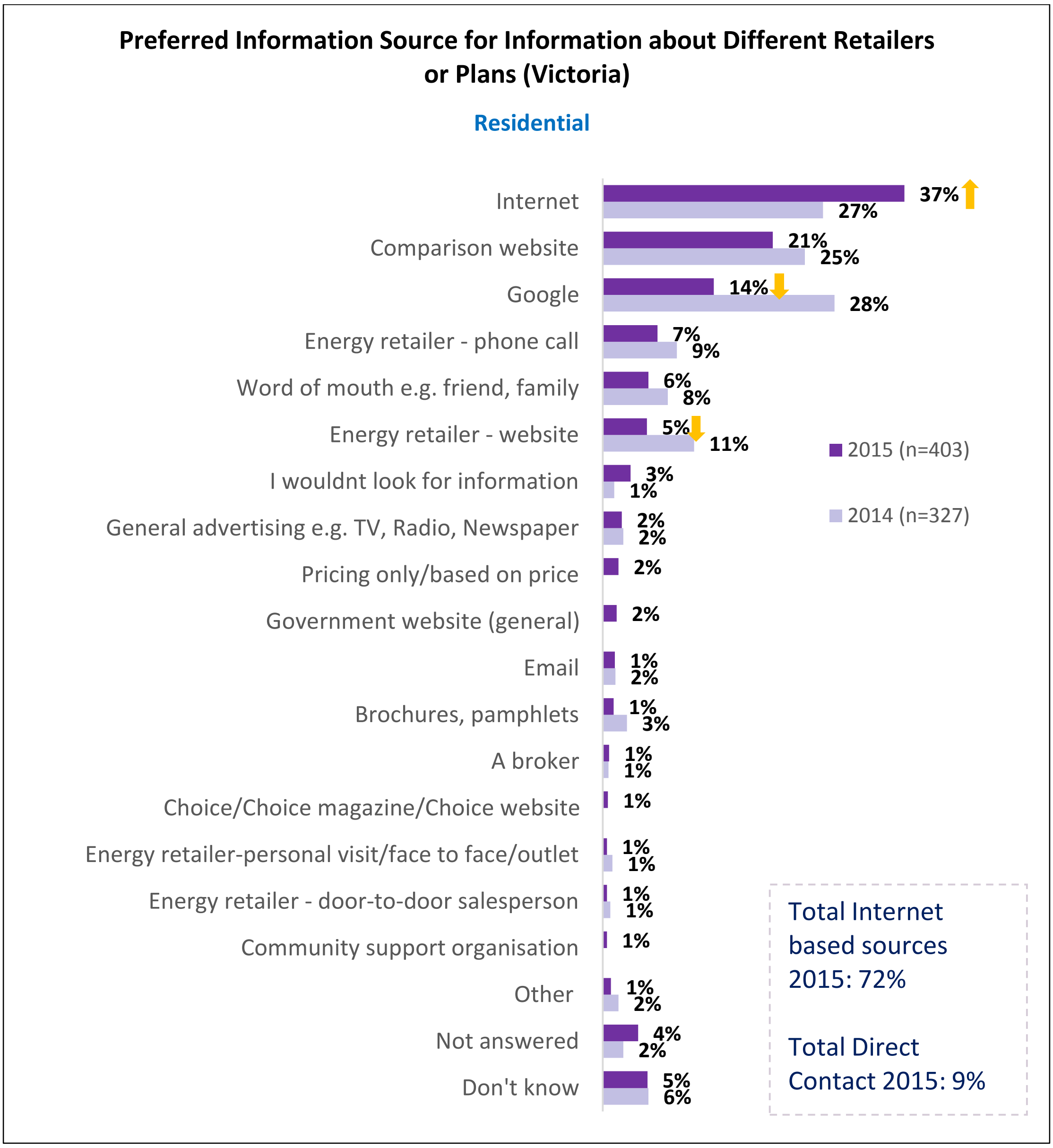
Base: Respondents who had investigates offers or options but had not switched (n=48). Business results not shown due to small sample size (n=9)
Q57. And thinking about the information sources you used when investigating different offers or options, which one was most useful in helping with your decision whether or not to switch?

Adequacy of Information

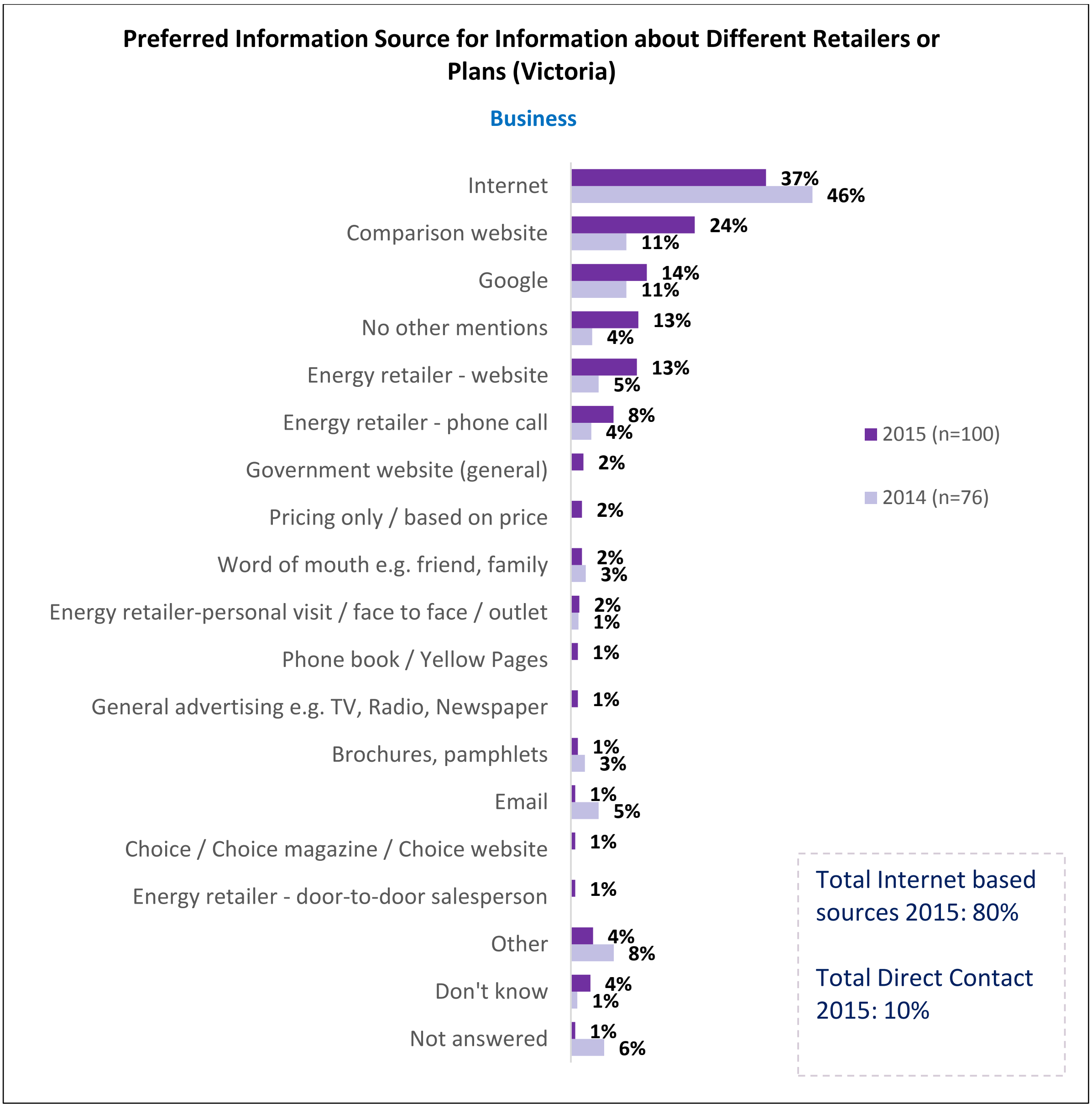


Base: All Respondents
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Preferred Information Sources

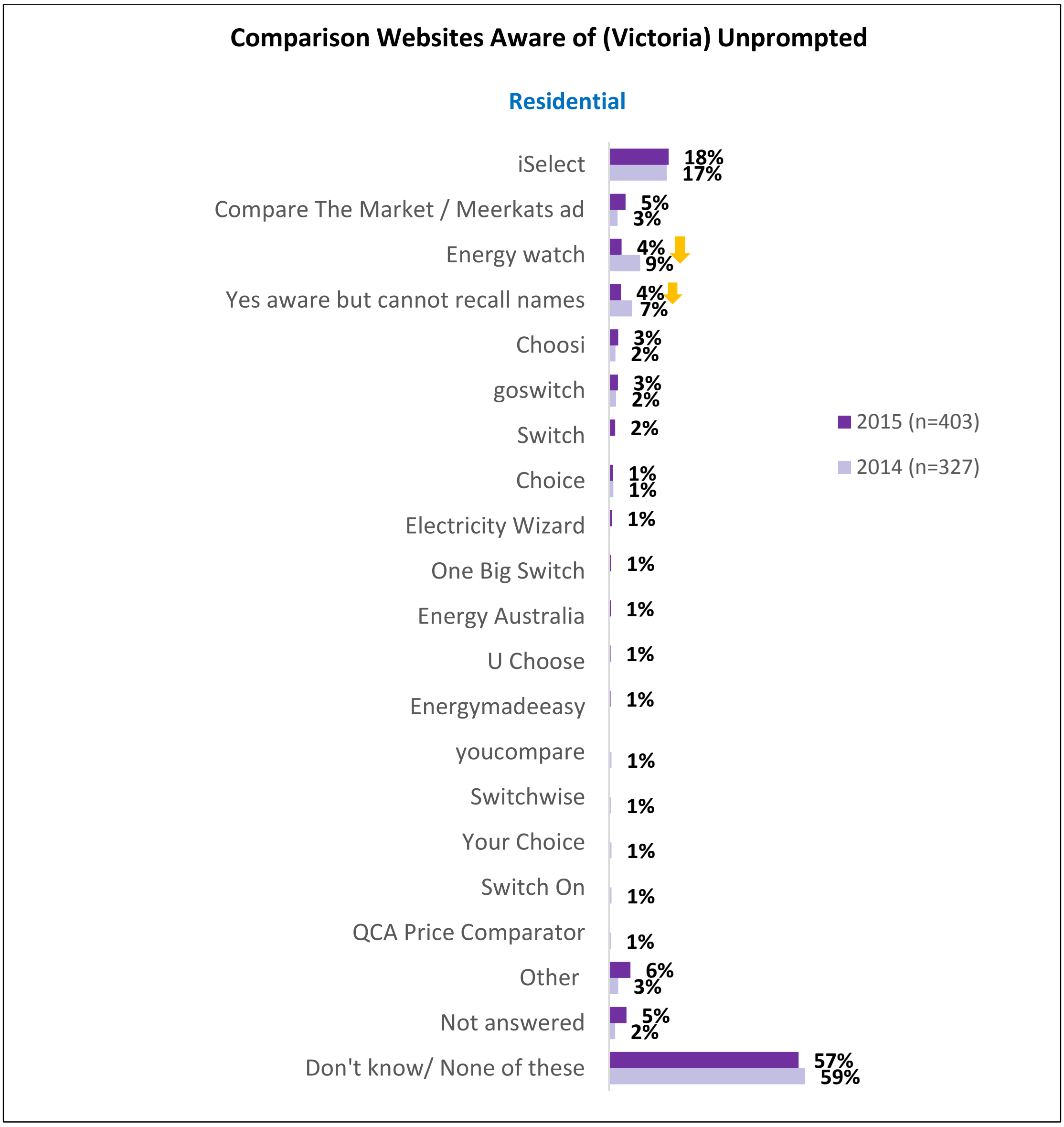


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

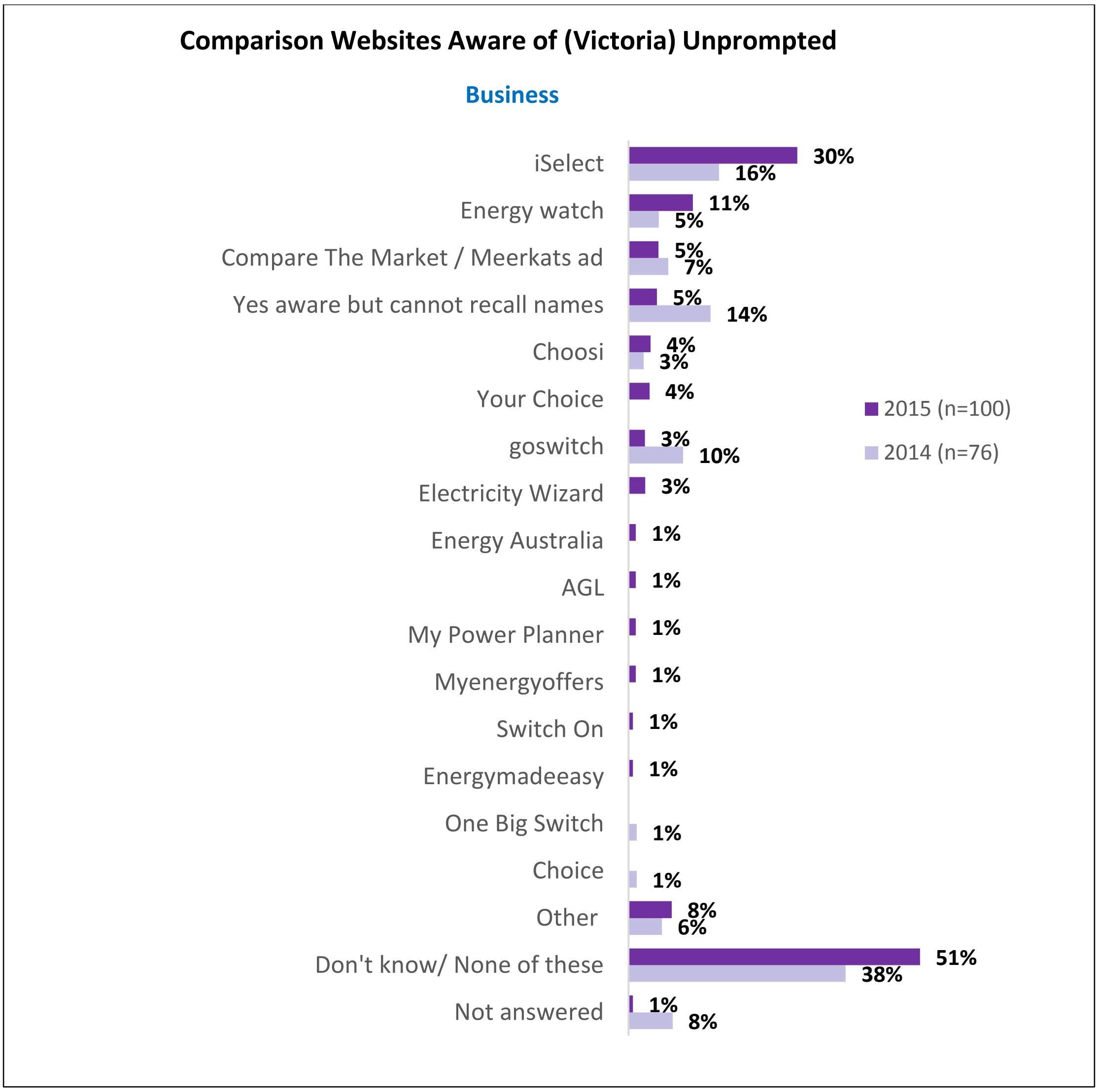


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

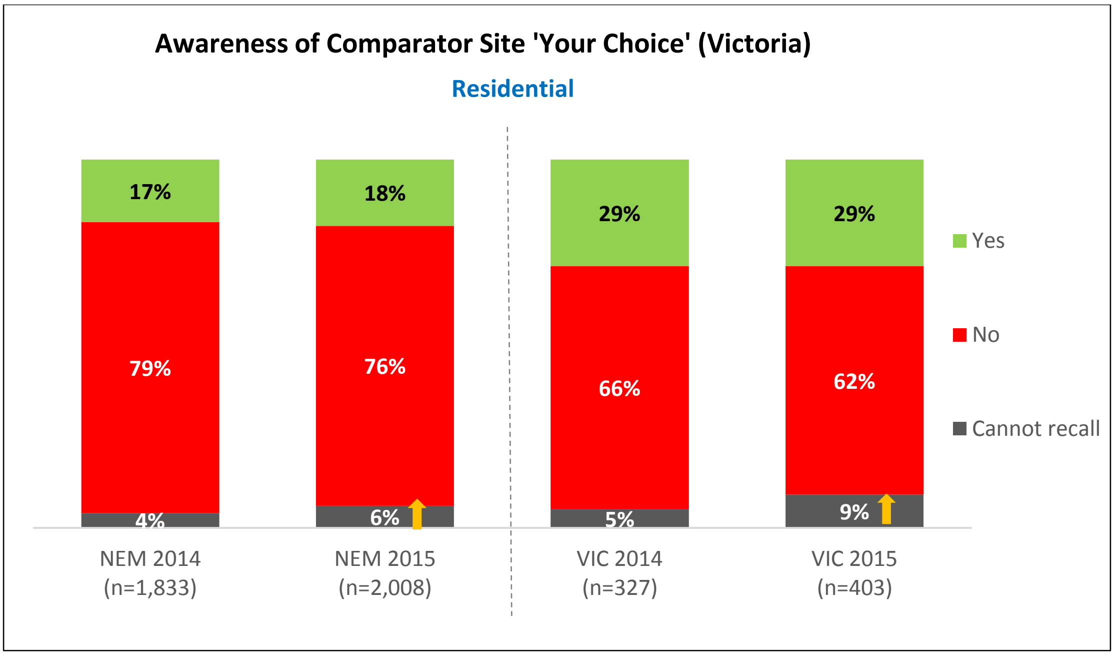
Awareness of Comparison Sites



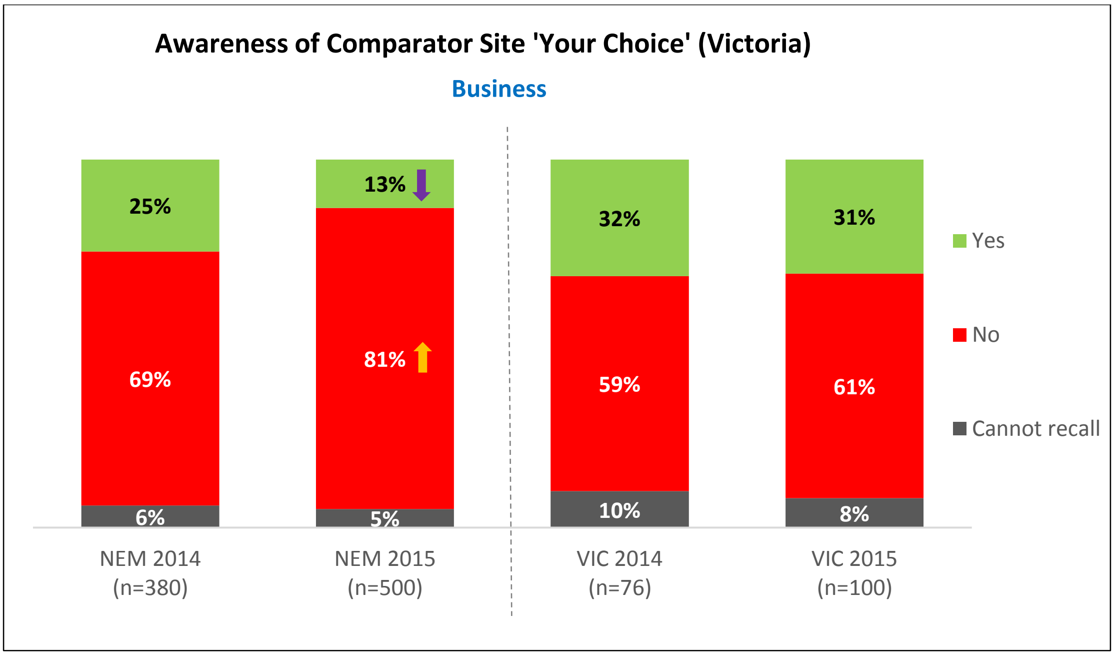
Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?

SOUTH AUSTRALIA

NEWGATE RESEARCH

2. South Australia

Table of Contents

2.1 Executive Summary

Introduction

This chapter outlines Newgate Research's findings from quantitative research conducted among small energy consumers in South Australia in February 2015.

The research involved a mix of telephone and online surveys with n=401 residential consumers and n=100 small business consumers. For the purposes of this survey, residential consumers were defined as the person in the household who is the main or joint decision maker when it comes to choosing the energy company. Small business consumers also had to be the main decision maker and, in addition their quarterly electricity bill needed to be less than $13,000 and if they had mains connected gas, their quarterly bill needed to be less than $3,750 in Adelaide and less than $3,500 in regional South Australia.

The sample breakdowns by methodology and for age and gender are shown in the tables below. In addition to these, we note that the sample also included n=202 residential consumers and n=23 small business consumers who had mains connected gas.

Respondent type by mode (n=)	**Residential**		**Small Business**	
	Metro	*Regional*	*Metro*	*Regional*
Online	234	67		
Telephone	77	23	77	23
Total	**311**	**90**	**77**	**23**

Age/gender breakdown (residential n=)	**Male**	**Female**	**Total**
18-34	22	53	75
35-54	78	100	178
55+	77	71	148
Total	**177**	**224**	**401**

Further details about the methodology are provided in the Methodology section.

Throughout this chapter, statistically significant differences (95% confidence level) between the 2014 and 2015 results are noted using arrows (↑↓). Where there a differences between individual sub-groups, these are indicated using **red** (meaning significantly lower than other groups) or **blue** font (significantly higher than other groups).

Key Findings

Awareness of choice remained very high in South Australia

The vast majority of consumers in South Australia were aware they could choose their energy company or plan. This was consistent with results among residents in 2014, although there was a significant increase in awareness among business consumers that they could choose their electricity company. When it came to confidence in choosing the right energy option or offer, South Australian consumers were quite confident overall. These results were fairly consistent with the NEM averages.

Switching rates in South Australia have remained consistent despite a significant decline in approaches from energy companies

Around four in ten residents (41% - significantly less than 58% in 2014) and over half the small business consumers surveyed (56% - slightly down from 66% in 2014) had been approached by an energy company offering to sell them electricity or gas. On average, consumers had been approached by about three companies in the past 12 months.

Around half of the residential consumers surveyed had switched their electricity or gas company or plan in the past five years (49% of residents – slightly down from 56% in 2014). Switching rates among small business consumers (49% switched electricity company or plan in the past five years) remained consistent with 2014 (47%).

Consistent with many other jurisdictions, higher levels of interest and investigation among vulnerable customers did not result in higher levels of switching

A quarter of residential consumers (25%) and four in ten small business consumers (39%) had actively investigated offers or options that they could potentially switch to in the past 12 months.

In South Australia, those experiencing difficulty paying their energy bills were more likely to have actively investigated their options and offers and were also more interested in seeking out a better deal. Despite these higher levels of interest and investigation, switching rates were not higher among this group of consumers. Analysis of the attitudes shows that they are significantly more concerned about hidden fees and charges.

Consistent with all other jurisdictions, price related factors remained the main reason for switching energy company or plan

A large majority of those who switched energy company or plan said it was due to price related factors such as wanting a cheaper price, receiving a discount or a good incentive.

When deciding whether or not to switch, the most important factors (prompted) for both residents and small business consumers were the estimated total bill amount followed by the discounts offered and the price per unit of energy.

A large majority of those who switched were happy with the outcome

The majority of consumers who had switched their energy company or plan agreed that they were happy with their decision to switch and that they got what they expected after they switched. Cheaper prices, discounts and incentives received were by far the biggest reasons for being happy with the decision to switch and to a lesser extent, improved customer service or better billing arrangements.

Despite relatively high levels of satisfaction with the outcomes, only around half of those who switched company or plan agreed that they would recommend switching to their family, friends or colleagues.

Consistent with most other NEM jurisdictions, a lack of value proposition and being happy with their current arrangements remained the biggest barriers to switching

The main reasons given among residents who had investigated offers but had not switched in the past 12 months were the lack of value proposition (39%). Among residential consumers who had not investigated options nor switched provider or plan, the main reasons given were that they were happy with their current retailer or situation (29%), they were too busy or could not be bothered (19%) or they did not see the value in switching (15%). Among business consumers who had not investigated options nor switched, the main barrier was they were too busy or could not be bothered (54%).

Small business consumers were more interested in seeking out a better deal than residential consumers

One in ten consumers (9% residential, 11% small business) indicated they were currently looking for a better deal and around three in ten residents (30%) and four in ten small business consumers (45%) were interested but not currently looking for a better deal. Four in ten residents (40%) and three in ten small business consumers (28%) were not interested in switching at all.

Attitudes towards switching and investigating offers in South Australia were very consistent with other NEM jurisdictions.

Overall satisfaction with the level of market choice remained consistent

Six in ten consumers in South Australia were satisfied with the level of market choice in their state (59% residential, 57% small business were somewhat or very satisfied) and this was consistent with 2014 and the overall NEM average. There was a significant increase in the proportion of residents who were *very satisfied* with the level of choice (from 13% in 2014 to 21% in 2015).

Value for money ratings among residents increased significantly in South Australia

While satisfaction with energy companies in South Australia remained consistent in 2015, there was a significant increase in the ratings for the value for money provided.

The internet remained the most popular information source

Consistent with 2014 and with other NEM jurisdictions, internet based information sources continued to be the most used, most useful and most preferred method to look for information about energy retailers and plans in general.

Consumers were fairly confident they could find the right information

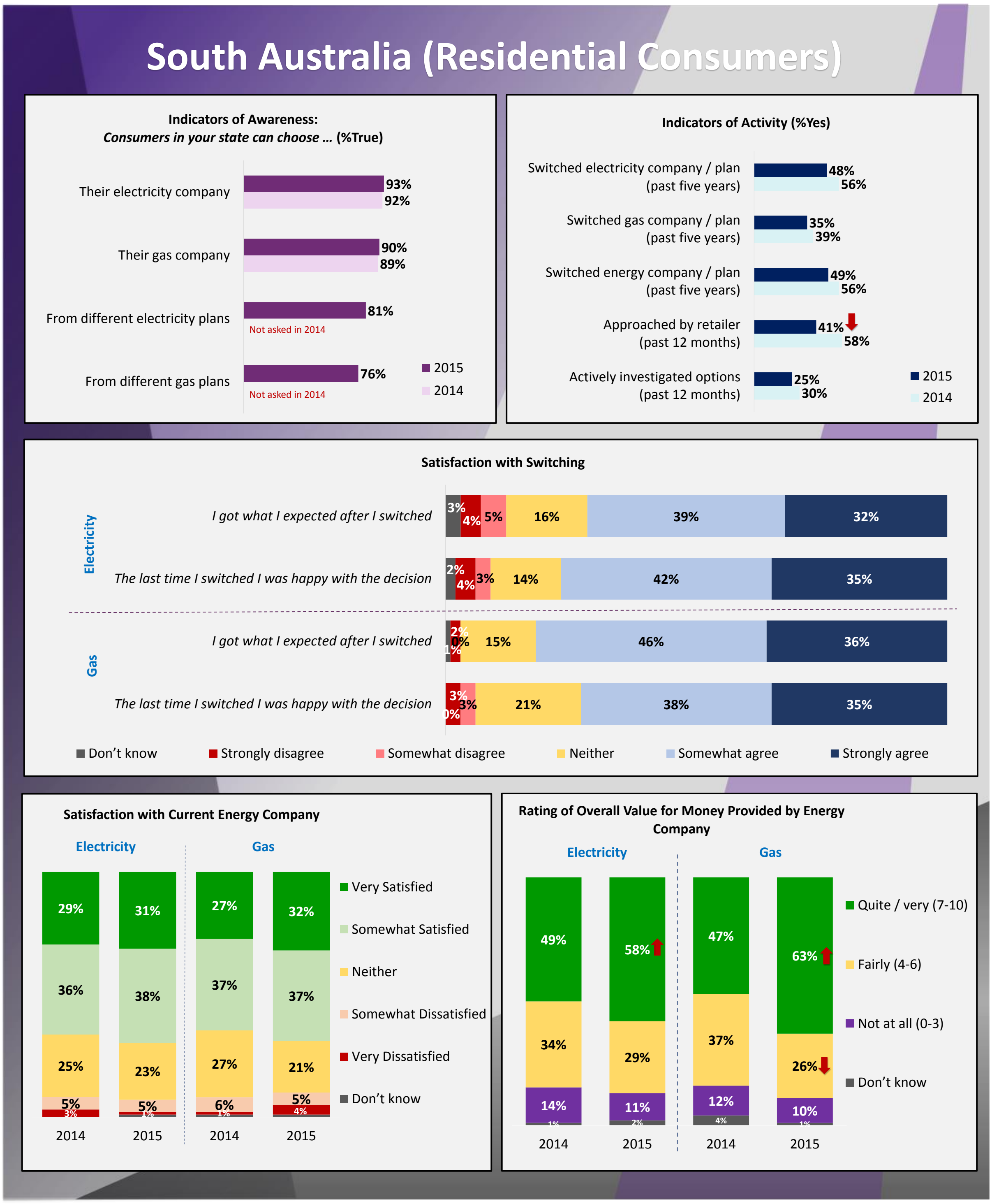
Consistent with the NEM average, just over half of residential consumers (54%) and four in ten business consumers (44%) were quite or very confident (rating 7 or more out of 10) in being able to find the right information to choose a suitable energy plan.

Unprompted awareness of comparison websites remains low in 2015

The majority of consumers surveyed could not name any comparison websites that could help them choose a good energy deal (72% of residents and 81% of small business).

Consistent with 2014 findings, when prompted, around one in ten consumers (13% for both residential and small business) had heard of the *energymadeeasy* website.

Snapshot of Results



2.2 Key Findings in Detail

2.2.1 Customer Awareness & Understanding

Summary of Findings

In South Australia, consumer awareness of being able to choose their own energy company or plan remained very high. Nearly all consumers surveyed were aware they could choose their electricity (93% of residential consumers, and 98% of small businesses – a significant increase from 92% in 2014) or gas company (90% of residential consumers).

The majority of consumers were aware they could choose from different electricity plans with different price structures, contract lengths and terms (81% of residents and 92% of small businesses). Awareness of being able to choose from different gas plans was comparatively lower with 76% of residents being aware they had a choice.

While there are actually 16 electricity brands operating in South Australia, on average, residents thought there were just six electricity brands to choose from and small business consumers thought there were about seven. When it came to gas brands residents were more accurate and on average said there were about five to choose from (there are four).

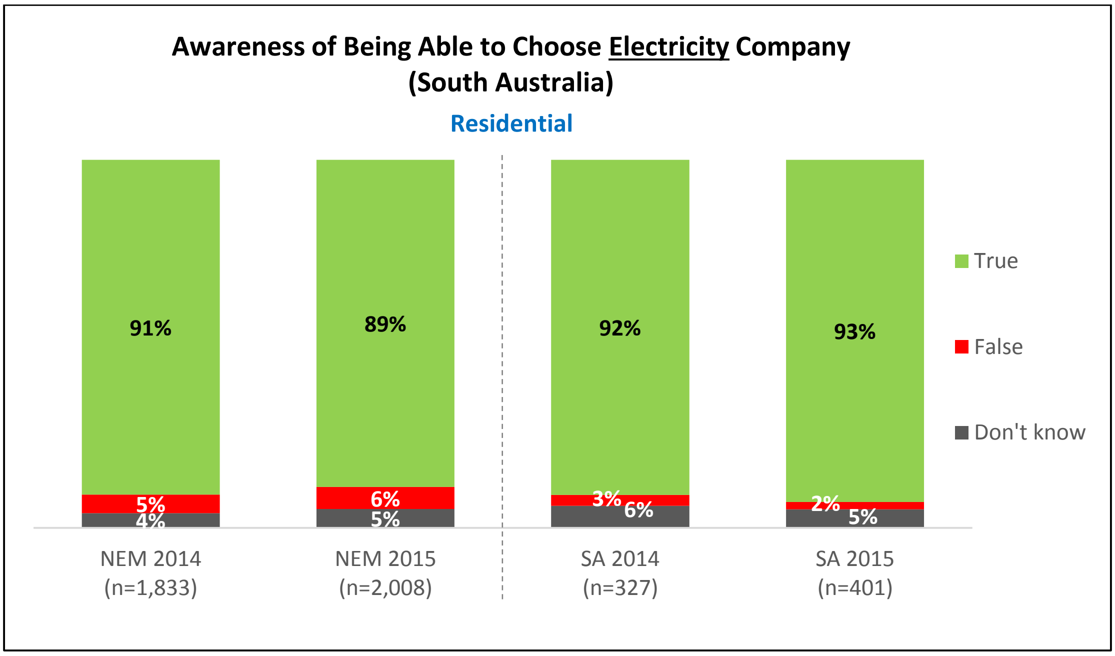
Consumers were fairly confident they could choose the right energy option or offer for their household or business. Around six in ten residents (57%) and almost half of small business consumers (46%) rated their confidence as seven or more out of ten. Please note, however, that previous qualitative research conducted in 2014 suggests that consumer confidence levels tend to be overstated and that the majority do not understand the options and offers available.

The following groups of residential consumers had significantly higher confidence levels:

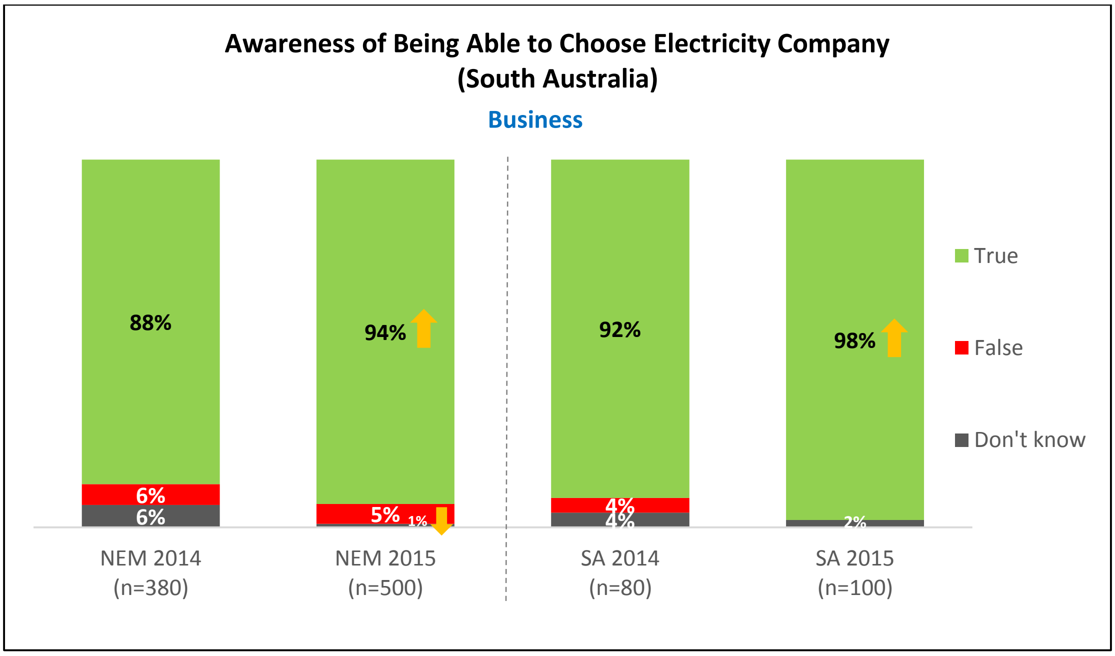
- Those living in metropolitan areas;
- Those aged 18 to 34 years; and
- Those with a low quarterly electricity bill.

Awareness and confidence levels in South Australia were in line with the NEM average. Please note that confidence levels have not been compared to the 2014 results due to a change in the question wording in the 2015 survey.

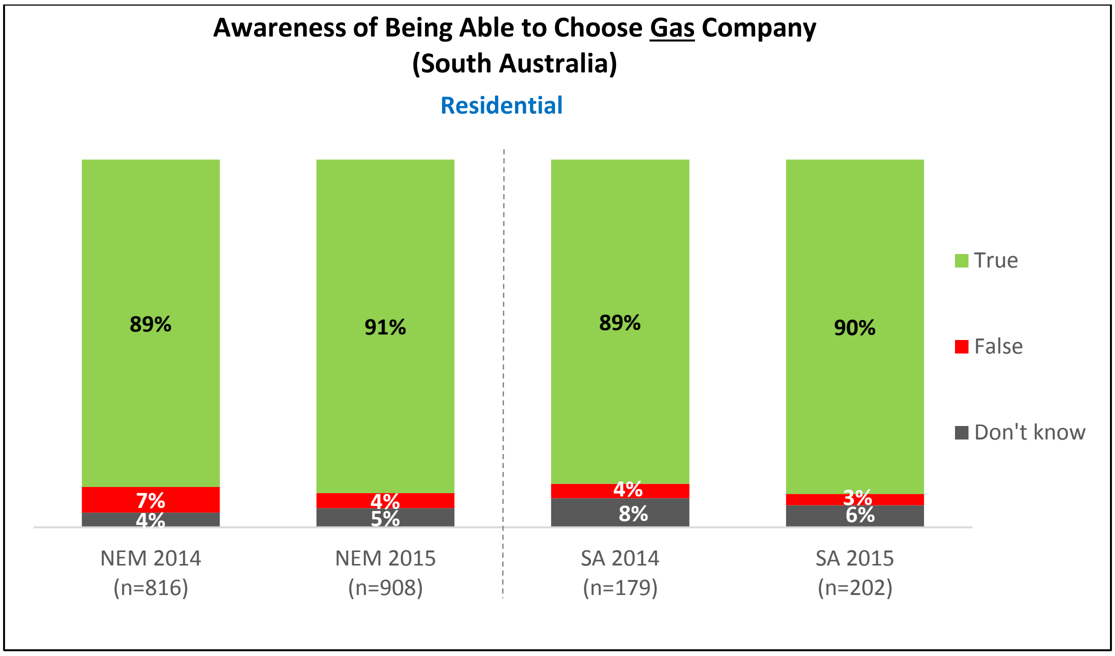
The Results



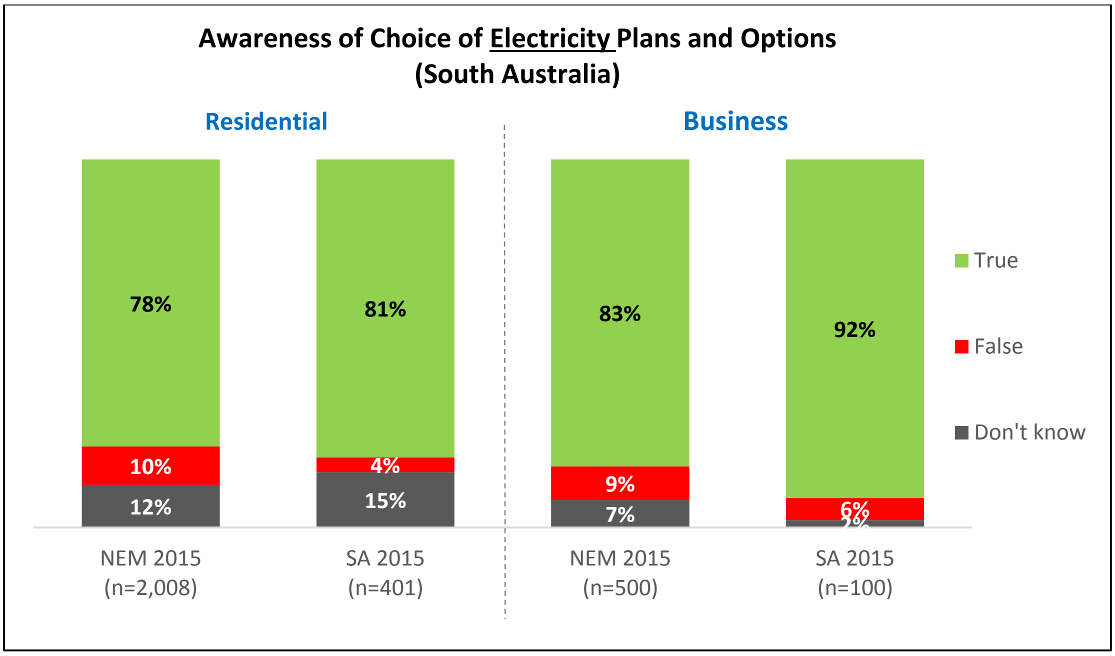
Base: All Respondents
Q13a. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



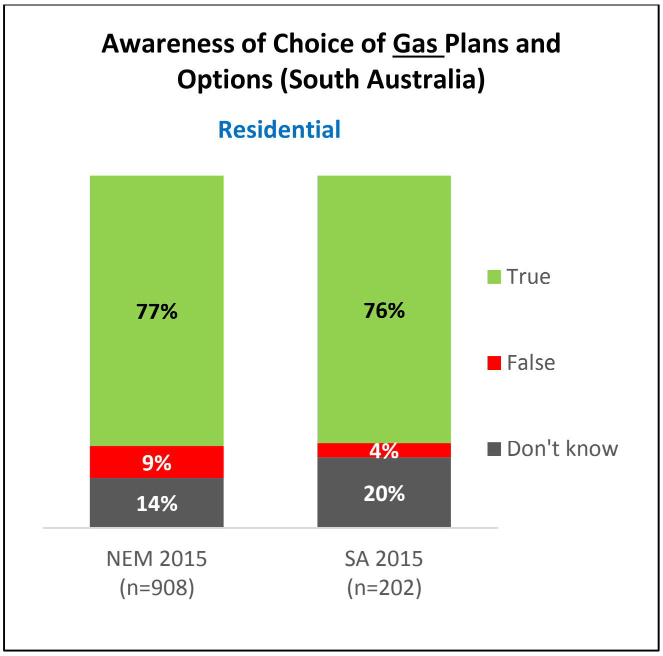
Base: All Respondents
Q13a. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



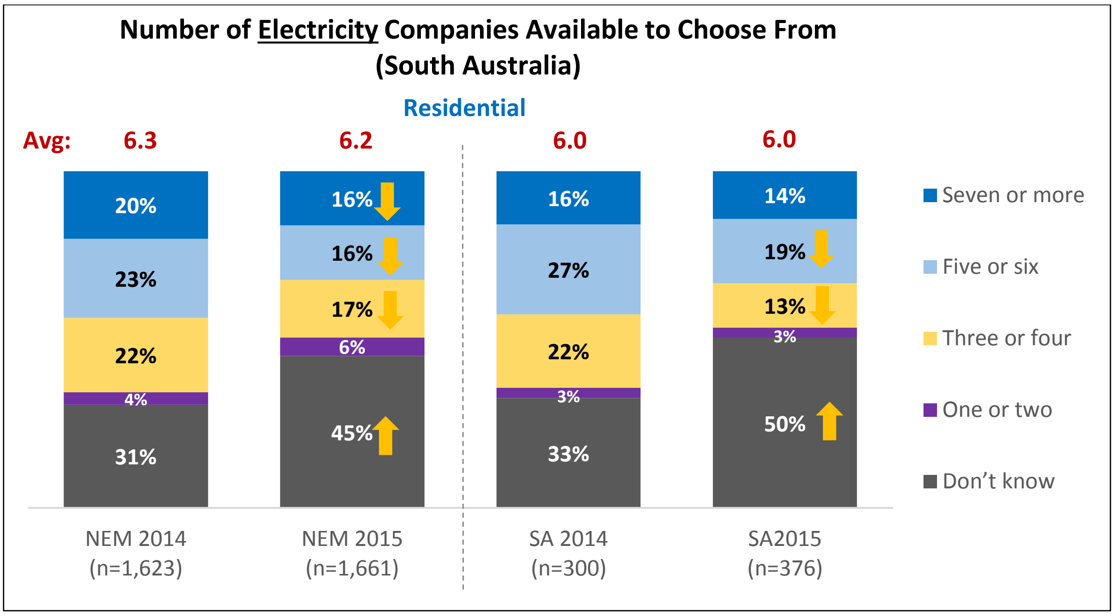
Base: Respondents with mains connected gas. NB: Small business consumer results not shown due to small sample size (n=23)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company



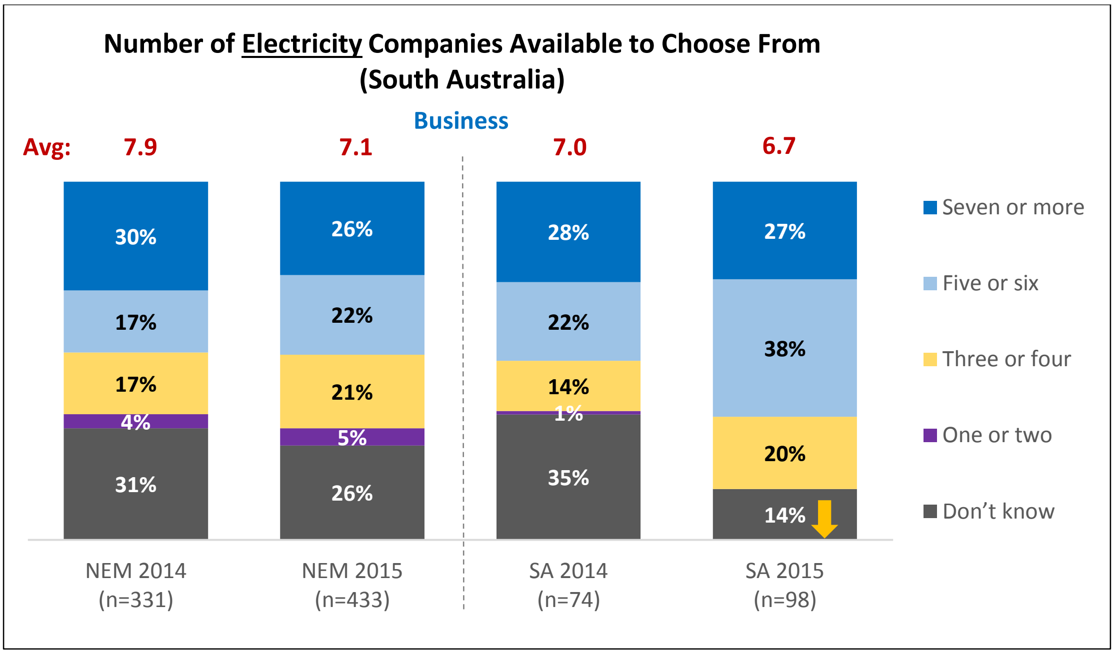
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



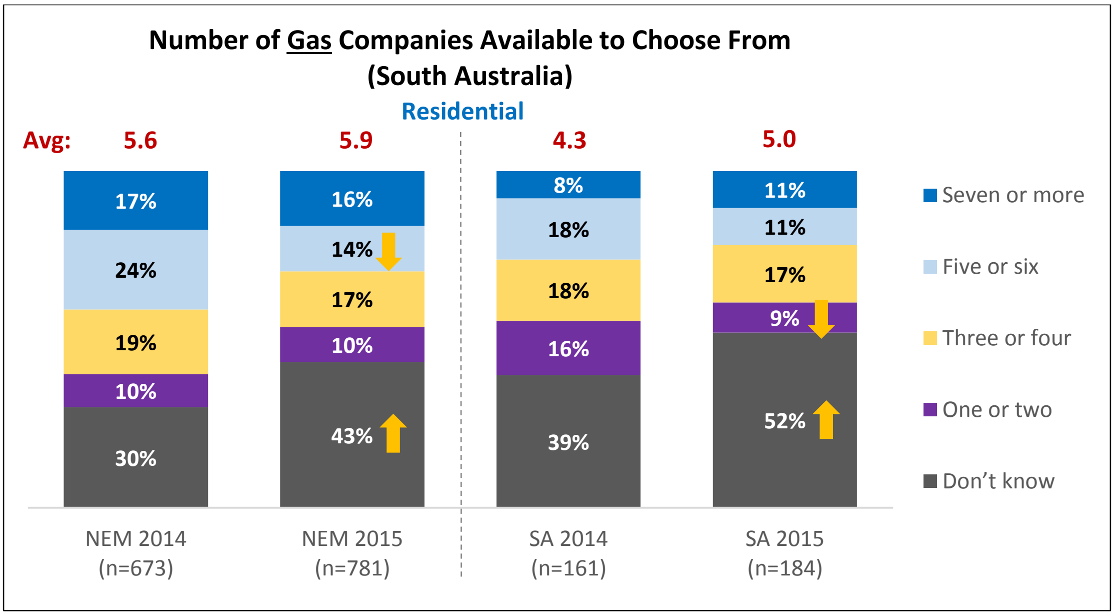
Base: Respondents with mains connected gas. NB: Small business consumer results not shown due to small sample size (n=23)
Q13. Please tell me whether you think the following statements are True or False. d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



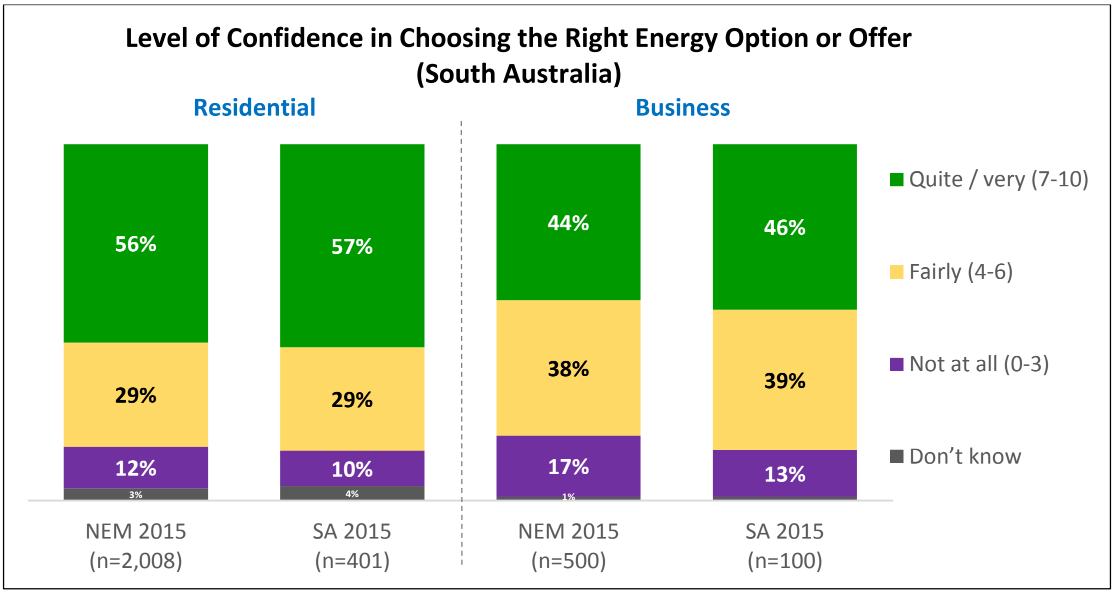
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: Respondents who say they can choose their gas company. NB: Small business consumer results not shown due to small sample size (n=23)
Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory?



Base: All Respondents
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

2.2.2 Market Participation

Summary of Findings

Incidence of Switching or Investigating Offers

As in 2014, survey respondents were asked how many times they had switched their electricity or gas company or plan in the past five years. To allow more granular tracking in future, those who had switched at least once in the past five years were also asked how many times they had switched in the past year.

In South Australia two in ten residential consumers (19%) changed their electricity or gas company or plan in the past 12 months. Around one in ten small business consumers had changed their electricity company or plan (13%). Switching rates in South Australia in the past 12 months were lower than the NEM average (23% of residents switched either their electricity or gas company or plan and 28% of small business consumers had switched electricity company or plan).

Around half of the residential consumers surveyed had switched their electricity or gas company or plan in the past five years (49% of residents). Switching rates among residents in South Australia in the past five years were consistent with the NEM average (51%).

Switching rates among small business consumers (49% switched electricity company or plan) also remained consistent with 2014 (47%) and the NEM average (55%).

The following types of residential consumers were significantly more likely to have switched electricity or gas company or plan in the past five years:

- Those aged over 35;
- Those with a medium household income;
- Those who had been approached by an energy company;
- Those who had actively investigated offers; and
- Those with a lower electricity bill.

Residents with mains gas, those on a payment arrangement as a result of financial hardship and those currently experiencing financial difficulty paying their bill were significantly more likely to have switched electricity or gas company or plan in the past 12 months.

Around four in ten residents (41%) and over half the small business consumers surveyed (56%) had been approached by an energy company offering to sell them electricity or gas. For residents, this was a significant decline since 2014 (58%) and was consistent with an overall decline in the NEM average (from 53% in 2014 to 39% in 2015). On average, consumers had been approached by about three companies in the past 12 months.

A quarter of residential consumers (25%) and four in ten small business consumers (39%) had actively investigated offers or options that they could potentially switch to in the past 12 months. Results in South Australia remained consistent with 2014 for both residents and businesses despite an overall decrease in the NEM average in 2015 among small business consumers. The following types of residential consumers were significantly more likely to investigate offers:

- Those receiving a concession or rebate on their bills;
- Those currently experiencing financial difficulty paying their bill;
- Those with solar panels; and
- Those who had been approached by an energy company.

Motivations for Switching

Consistent with other NEM jurisdictions, price related factors remained the main reason for switching energy company or plan in 2015 (69% of residential and 81% of small business consumers mentioned this unprompted for electricity and 59% of residents mentioned it for gas). Other lower level motivations included moving house or business premises (9% residential and 2% small business) or service related reasons (10% residential and 9% small business).

When deciding whether or not to switch, the most important factors for both residents and small business consumers were the estimated total bill amount followed by the discounts offered and the price per unit of energy. The relative importance of these factors was consistent with all other NEM jurisdictions.

For consumers with solar panels, the solar feed-in tariff was of most importance (47% rated it at 10 out of 10) relative to other factors such as the discounts offered (40%), the estimated total bill amount (38%) or the price per kWh (37%).

Satisfaction with Switching

The majority of consumers who had switched their electricity company or plan agreed that they were happy with their decision to switch (77% of residents, 80% small business) and that they got what they expected after they switched (71%, 73%). Similarly, the majority of residential consumers who had switched their gas company or plan agreed that they were happy with their decision to switch (72%) and that they got what they expected after they switched (80%).

Cheaper prices, discounts and incentives received were by far the biggest reasons for being happy with the decision to switch (71% of residents, 74% of small business consumers for electricity and 71% of residents for gas). To a lesser extent, consumers were happier with the customer service or billing arrangements.

Despite relatively high levels of satisfaction with the outcomes, only around half of those who switched company or plan agreed that they would recommend switching to their family, friends or colleagues (49% of residents and 51% of small business consumers who switched electricity and 50% of residents who switched gas). As was the case in other NEM jurisdictions, consumers who agreed they got what they expected and were happy with their decision to switch were significantly more likely to recommend switching compared to those who were not as satisfied with the outcomes.

When it came to the ease of comparing offers when deciding whether or not to switch electricity company or plan, around half found it fairly or very easy to compare electricity (55% of both residents and small business consumers) or gas offers and options (53% of residents). Consistent with other jurisdictions, investigating electricity or gas offers and options was not as easy as comparing offers for other services such as insurance, banking or communications.

Barriers to Investigating Offers or Switching

The main reason given among residents who had investigated offers but had not switched in the past 12 months was lack of a value proposition (39%). Lower level reasons included a lack of trust over what energy companies say (10%) or they felt it is too much hassle, they could not be bothered or they were too busy (10%). This was fairly consistent with most other NEM jurisdictions.

Among residential consumers who had not investigated options nor switched provider or plan, the main reasons given were that they were happy with their current retailer or situation (29%), they were too busy or could not be bothered (19%) or they did not see the value in switching (15%). Among business consumers who had not investigated options nor switched, the main barrier was they were too busy or could not be bothered (54%). These barriers were fairly consistent with those mentioned in 2014 and with other NEM jurisdictions.

Switching Intentions and Attitudes

Switching intentions in South Australia were very consistent with the NEM averages. In this jurisdiction:

- One in ten consumers (9% residential, 11% small business) indicated they were currently looking for a better deal;
- Around three in ten residents (30%) and four in ten small business consumers (45%) were interested but not currently looking for a better deal;
- One in ten (10% for both residential and small business) had recently switched and were not interested in looking for a while (new response option in 2015); and
- Four in ten residents (40%) and three in ten small business consumers (28%) were not interested in switching at all.

The following types of residential consumers were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal:

- Home owners;
- Those in a high income household;
- Those currently experiencing financial difficulty paying their electricity or gas bill;
- Those who had switched more than a year ago;
- Those who had been approach by an energy company;
- Those who have actively investigated offers and options; and
- Those with a high quarterly electricity bill.

In order to seriously consider switching their company or plan, residents wanted to save an average of $214 per year on their electricity bill and $170 per year on their gas bill. This was fairly similar to the NEM average. Small business consumers wanted to save about $868 on their electricity bill – considerably more than the NEM average ($609). As was the case in other NEM jurisdictions, there was a strong relationship between the bill amount and the amount needed to save in order switch in that the higher the bill, the higher the saving needed to be before they would consider switching.

Attitudes towards switching and investigating offers in South Australia were consistent with other NEM jurisdictions. The strongest levels of agreement were in regard to the statements: *I would switch my energy company if I was not satisfied with my current company* (78% residential, 81% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (72% residential, 66% small business).

Residential consumers who had switched in the past five years were significantly more likely to agree that: *I would switch my energy company if I was not satisfied with my current company.* By contrast, they were significantly <u>less</u> likely to agree with the following statements:

- *I'm concerned that if I switch there will be hidden fees and charges;*
- *It's too complicated to try and compare the various options and offers;*
- *I'd prefer to try and save energy to reduce my bill than to seek out a better deal; and*
- *The amount of money I could save is not worth the time and effort.*

Residential consumers with high electricity bills were significantly <u>more</u> likely to agree with the following statements:

- *I'm concerned that if I switch there will be hidden fees and charges;*
- *I can't be bothered looking for a better deal;*

- *It's too complicated to try and compare the various options and offers;*
- *I generally don't trust energy companies that promise a better deal;*
- *I'd prefer to try and save energy to reduce my bill than to seek out a better deal; and*
- *The amount of money I could save is not worth the time and effort.*

Vulnerable Consumers

In South Australia, those experiencing financial difficulty paying their energy bills were more likely to have actively investigated their options and offers and were also more interested in seeking out a better deal. Despite these higher levels of interest and investigation, switching rates were not higher among this group of consumers. Analysis of the attitudes shows that they are significantly more concerned about hidden fees and charges.

The Results

Incidence of Switching or Investigating Offers

In the Last Five Years

Provider **(% switched at least once)**	Residential			
	NEM		South Australia	
	2014 (n=1,833)	**2015 (n=2,008)**	**2014 (n=327)**	**2015 (n=401)**
Electricity Company	48%	39% ↓	35%	36%
Electricity Plan	39%	31% ↓	39%	31%↓
TOTAL Electricity	**60%**	**50% ↓**	**56%**	**49%**
Gas Company	40%	35% ↓	26%	29%
Gas Plan	30%	24% ↓	28%	24%
TOTAL Gas	**49%**	**40% ↓**	**39%**	**35%**
TOTAL Electricity or Gas	**61%**	**51% ↓**	**56%**	**49%**
Car Insurance	37%	35%	37%	33%
Mobile	32%	31%	32%	27%
Internet	30%	29%	32%	27%
Home Insurance	22%	26% ↑	22%	25%
Home Phone	22%	20%	20%	20%
Banking	18%	19%	15%	17%
Health Insurance	13%	16%	11%	12%

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

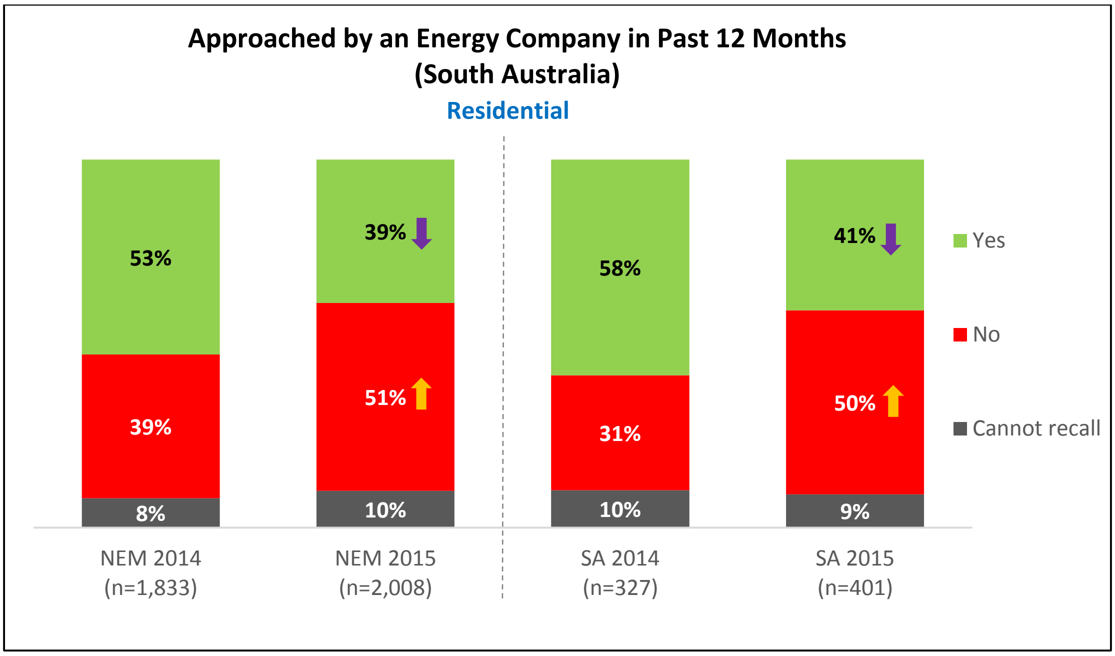
Provider **(% switched at least once)**	Business			
	NEM		South Australia	
	2014 (n=380)	**2015 (n=500)**	**2014 (n=80)**	**2015 (n=100)**
Electricity Company	47%	44%	33%	33%
Electricity Plan	39%	33%	33%	25%
TOTAL Electricity	**56%**	**55%**	**47%**	**49%**
Gas Company	46%	19%	Not shown due to small sample size (n=23)	
Gas Plan	50%	16%		
TOTAL Gas	**56%**	**23%**		
TOTAL Electricity or Gas	**57%**	**56%**		

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?

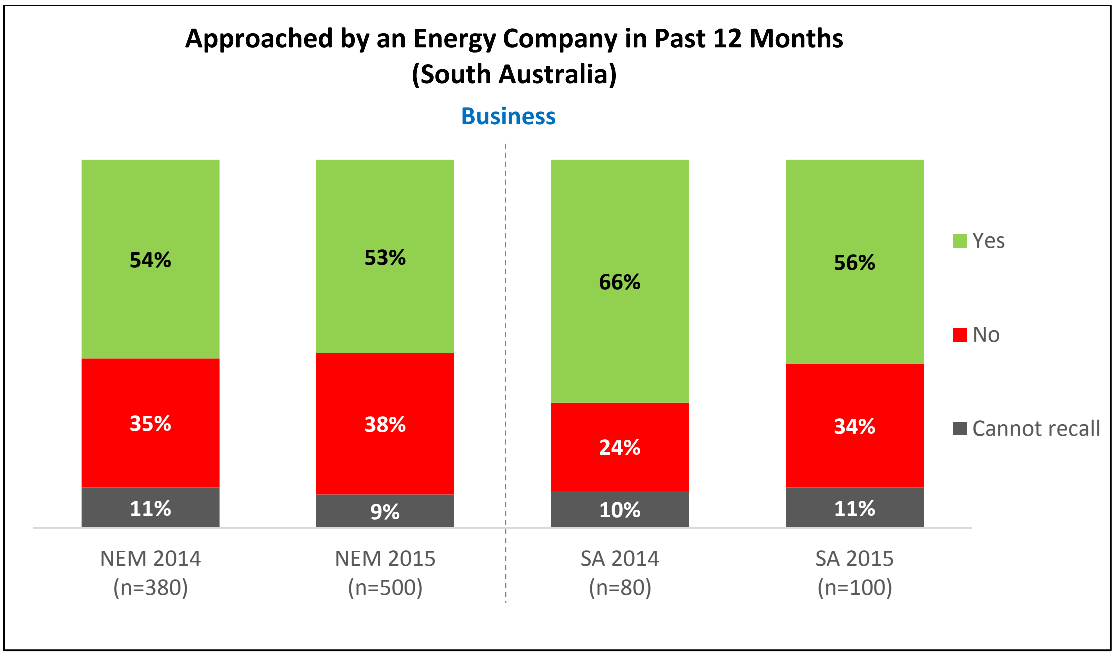
In the last 12 months

Provider (% switched at least once)	Residential		Business	
	NEM (n=2,008)	South Australia (n=401)	NEM (n=500)	South Australia (n=100)
Electricity Company	14%	9%	18%	8%
Electricity Plan	16%	13%	17%	5%
TOTAL Electricity	**22%**	**18%**	**28%**	**13%**
Gas Company	17%	11%	Not shown due to small sample size (n=23)	
Gas Plan	14%	12%		
TOTAL Gas	**21%**	**17%**		
TOTAL Electricity or Gas	**23%**	**19%**		

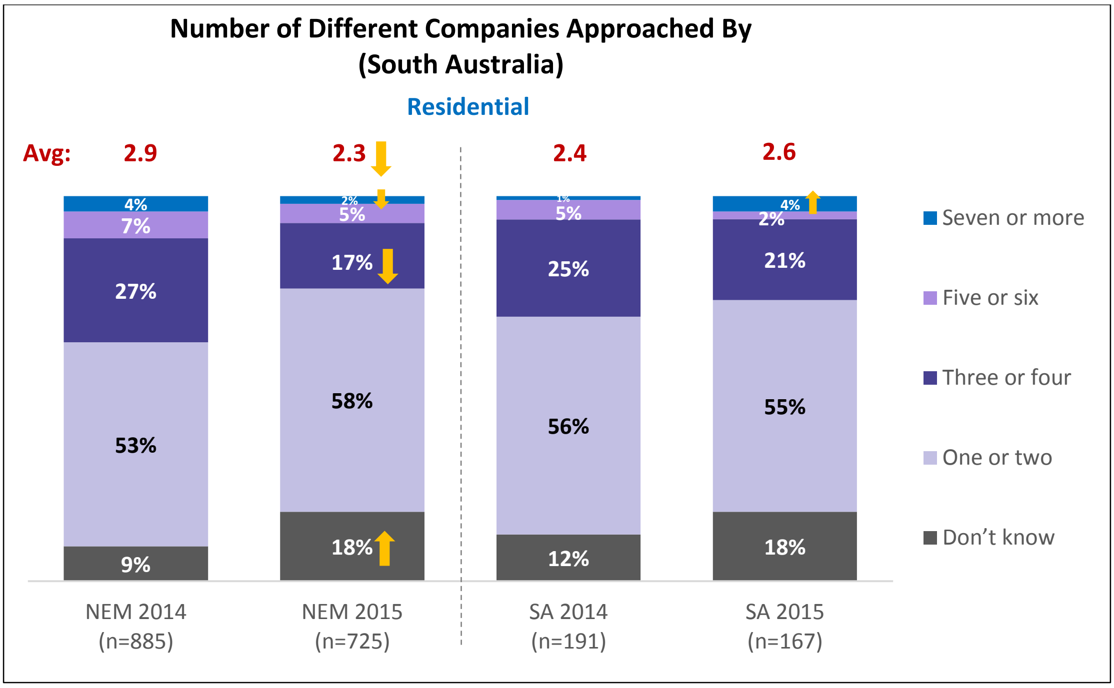
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?



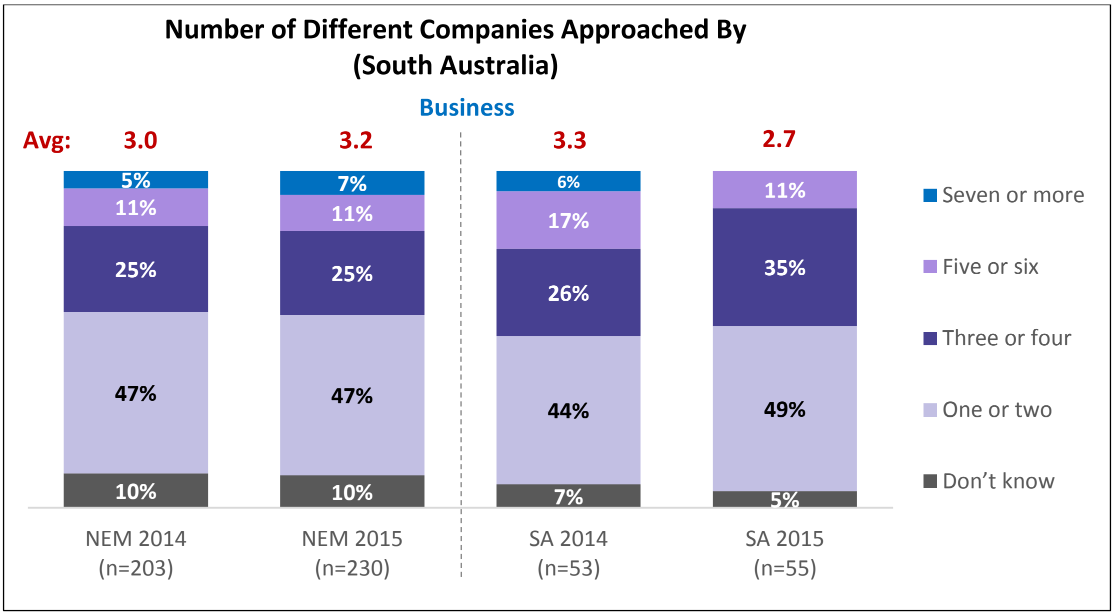
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



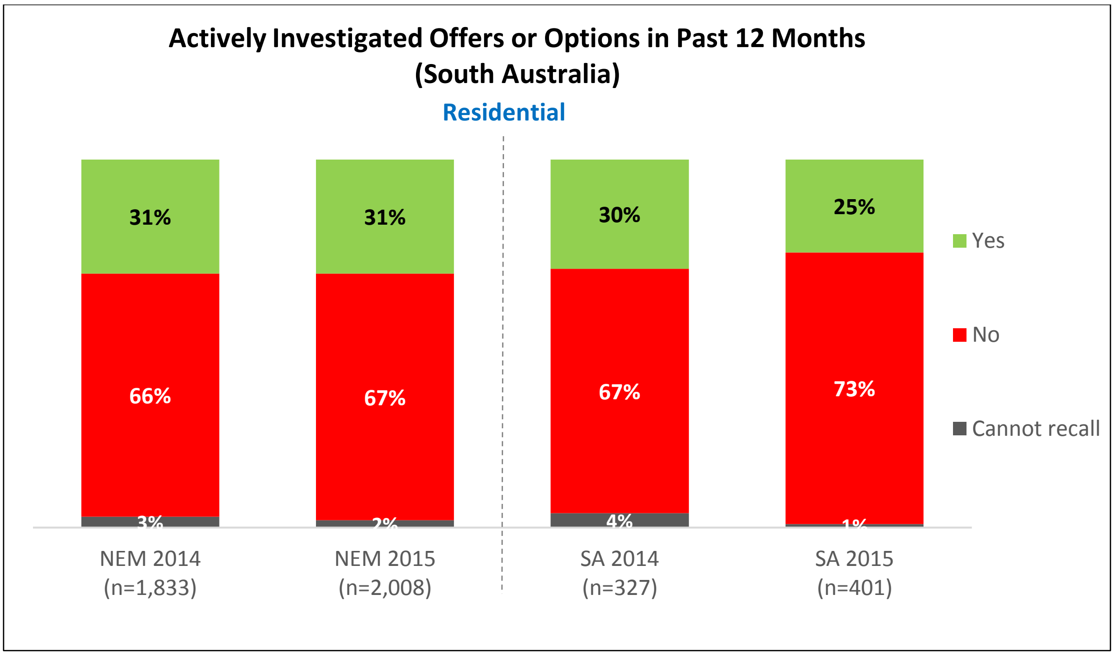
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



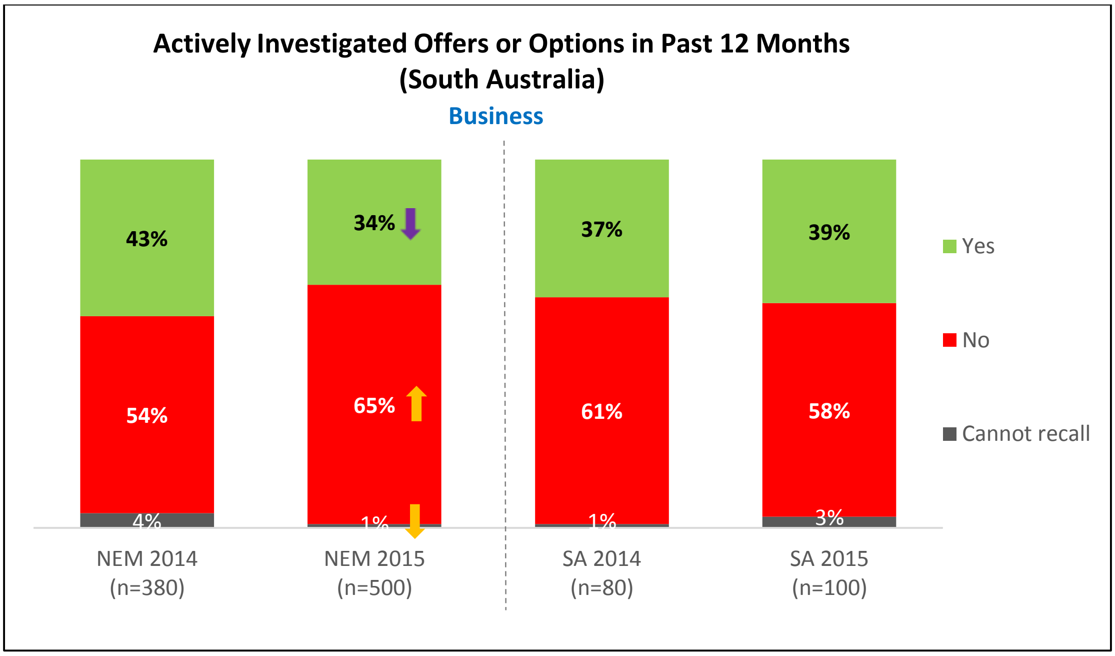
Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?



Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?

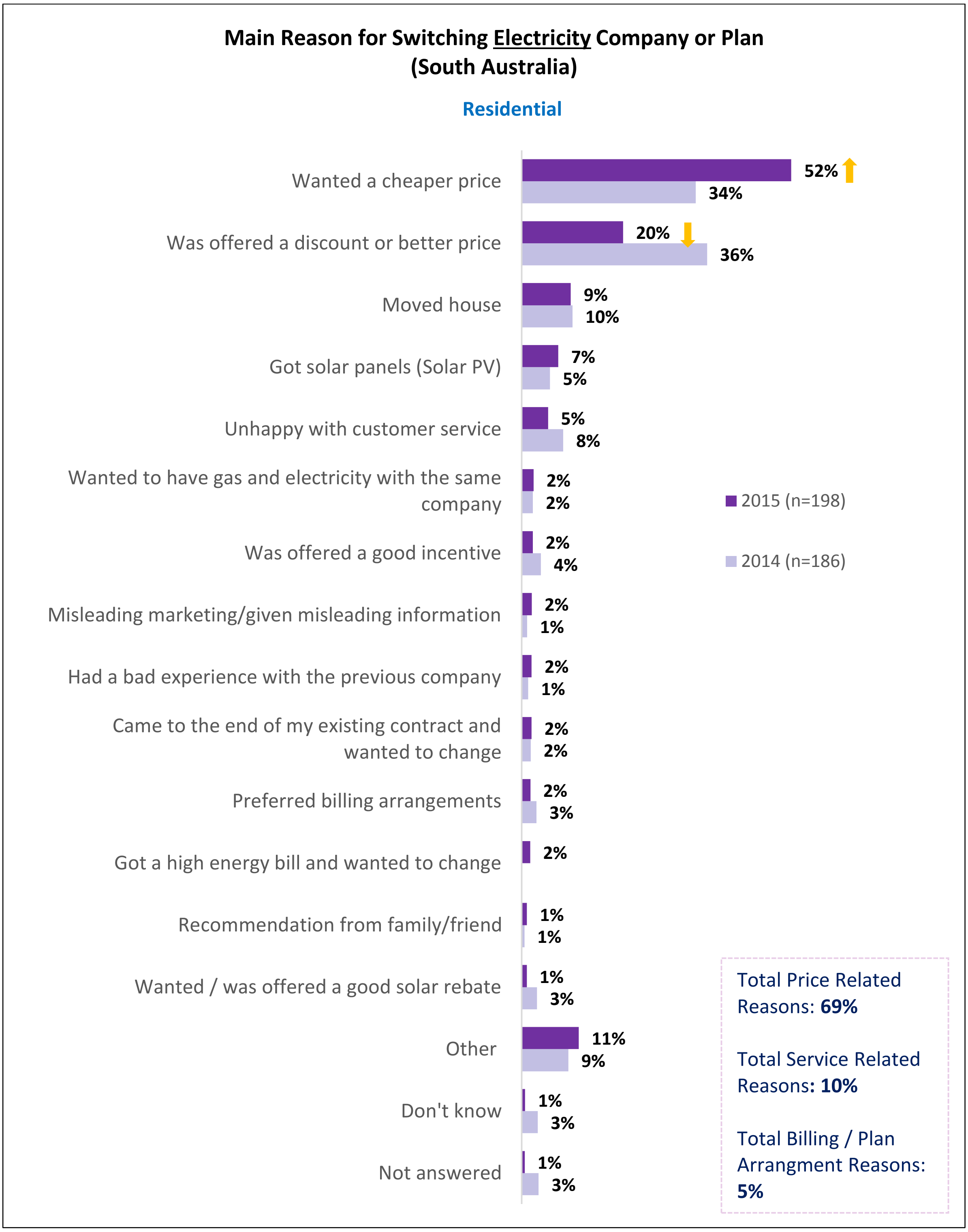


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

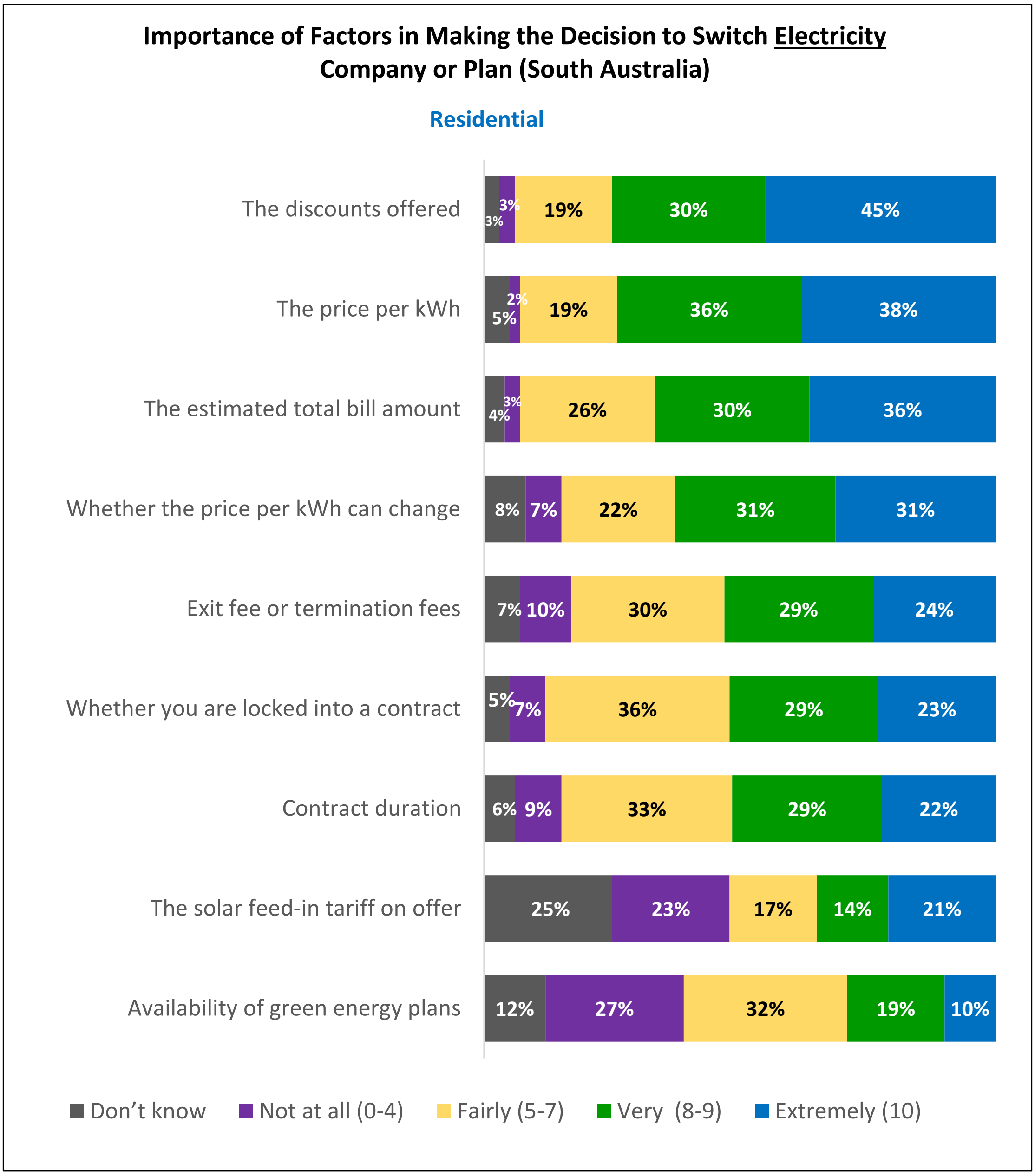


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

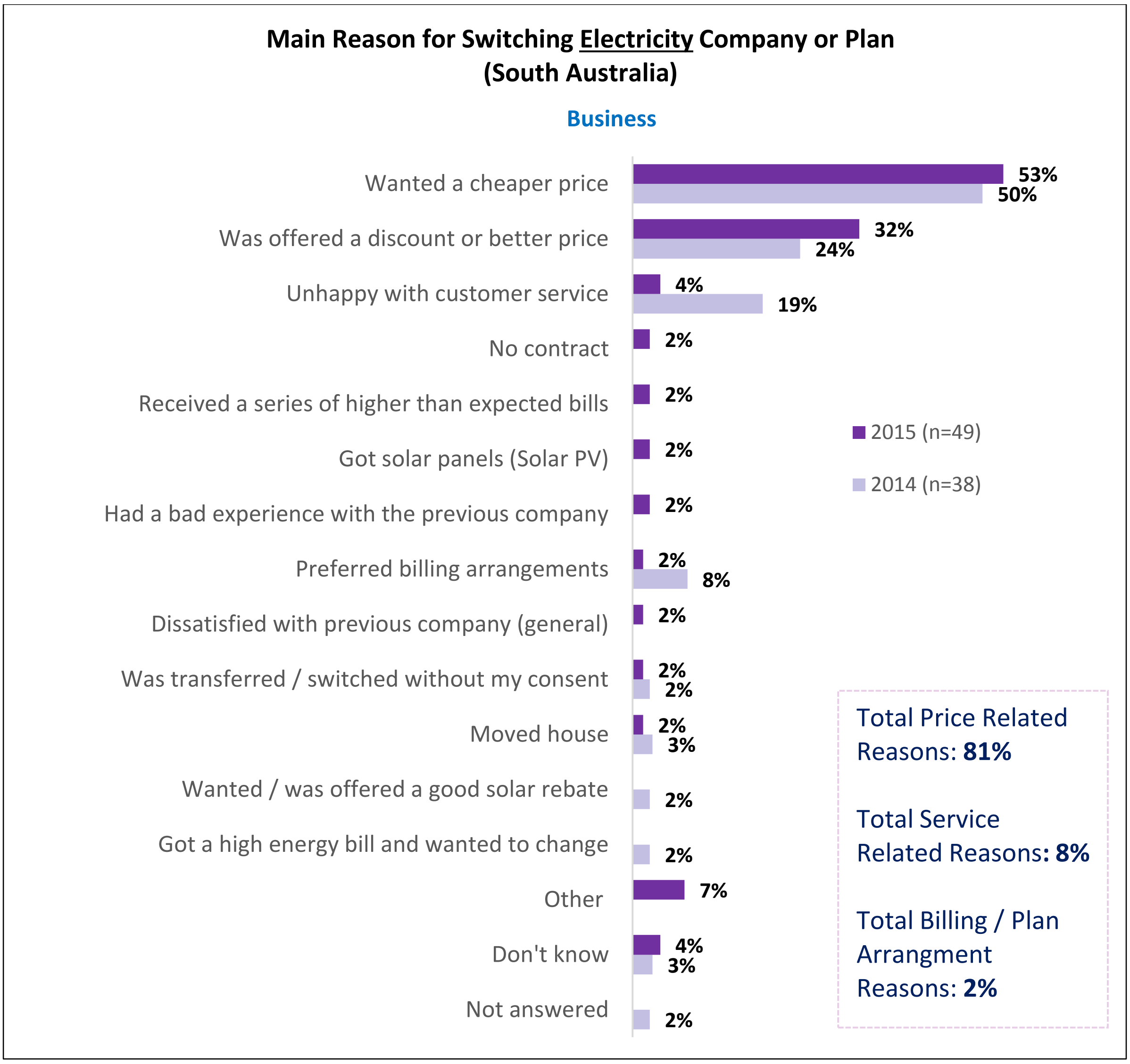
Motivations for Switching



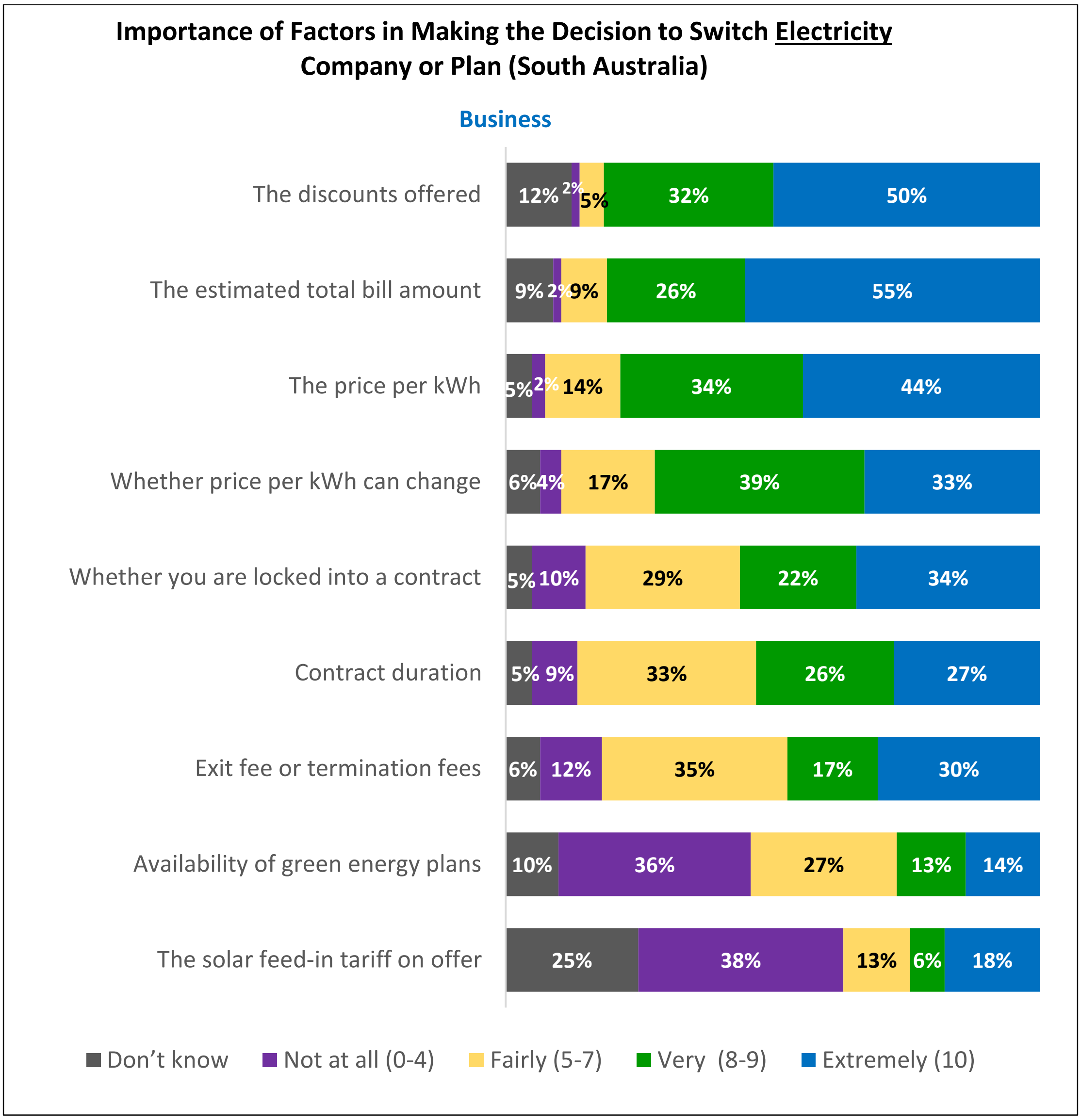
Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



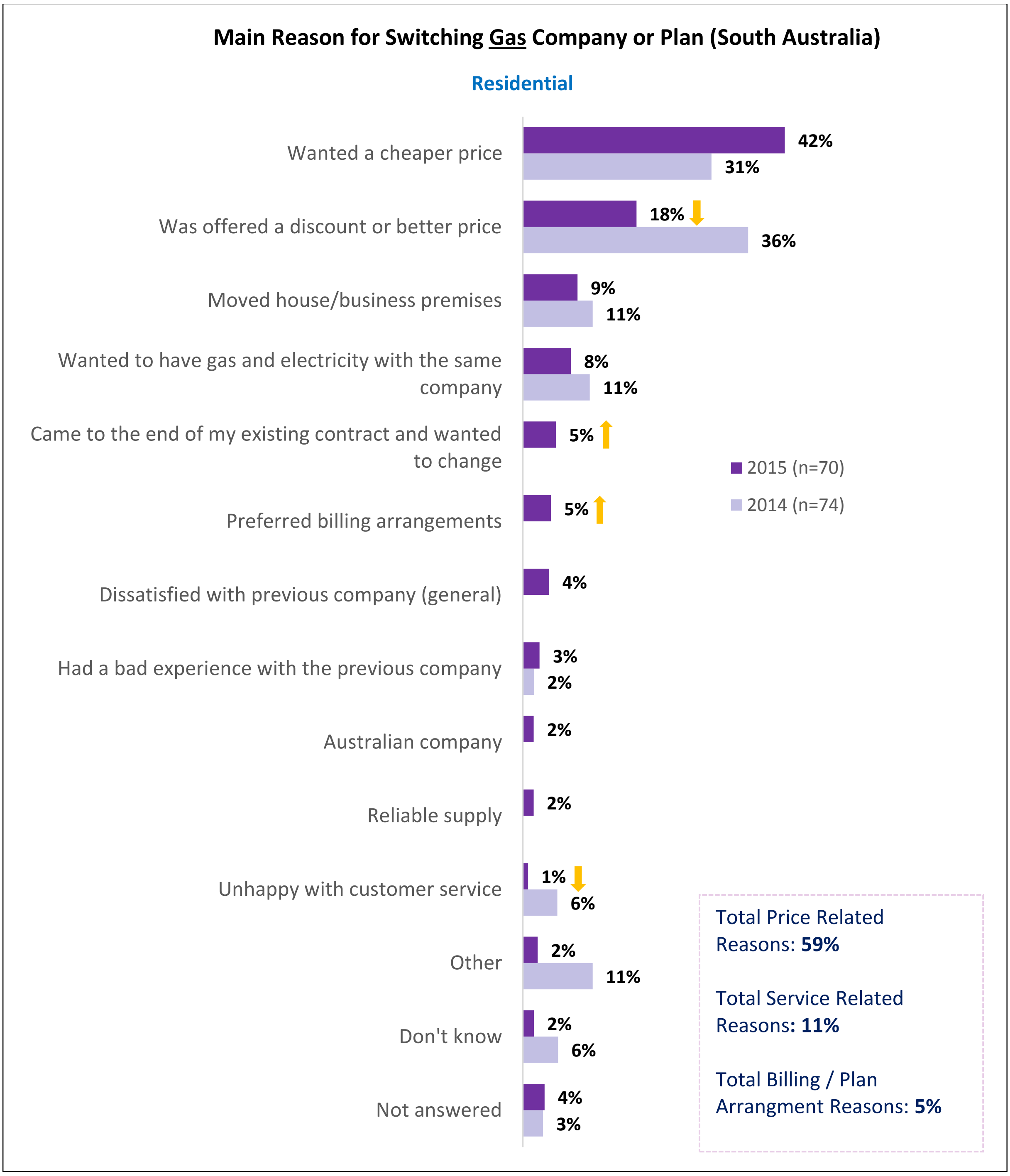
Base: Respondents who switched their electricity company or plan (Residential n=198)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?



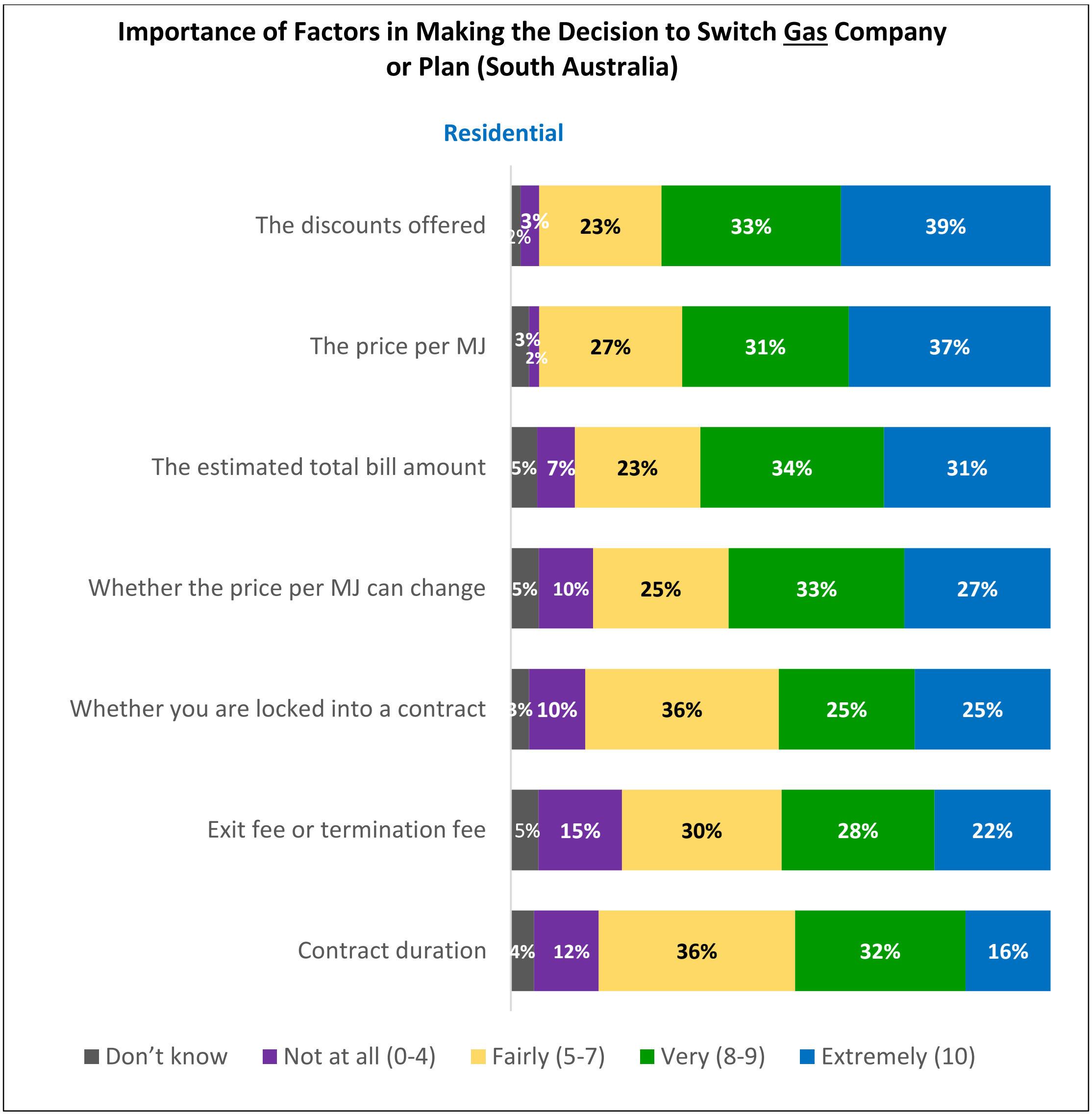
Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



Base: Respondents who switched their electricity company or plan (Business n=49)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?

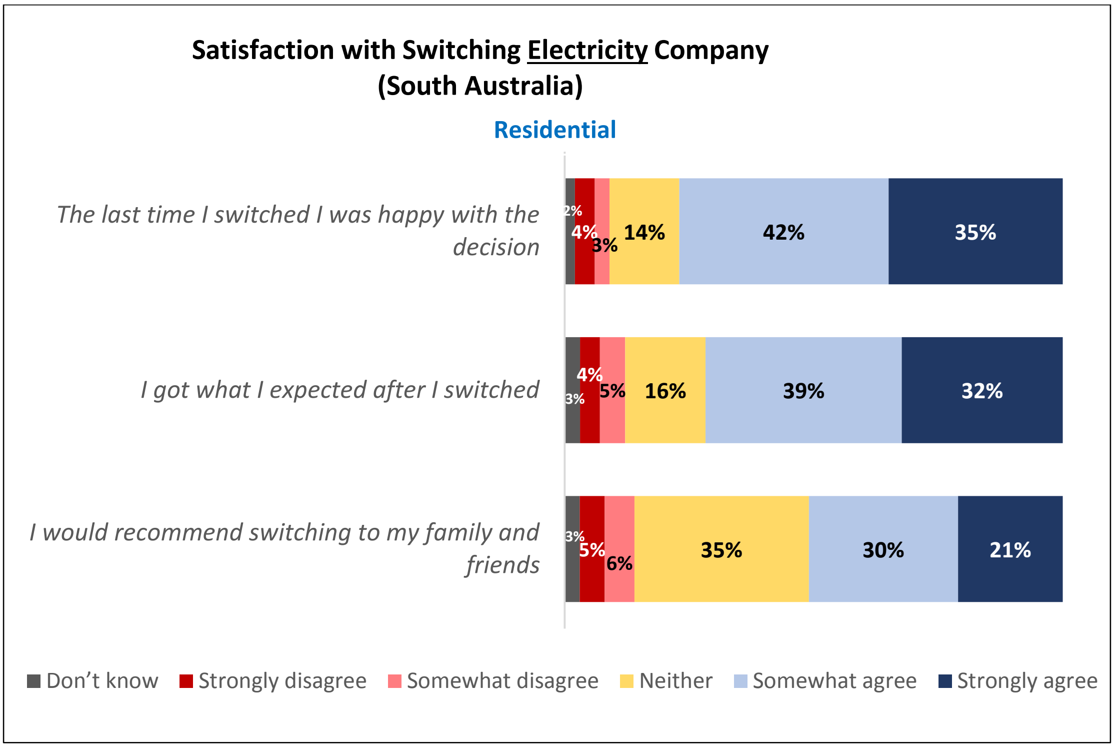


Base: Respondents who switched their gas company or plan. NB: Business results not shown due to small sample size (n=1)
Q27. You mentioned you changed your gas company or plan in the past five years. The last time you switched, what was the main reason? Any other reasons? MULTIPLE RESPONSE

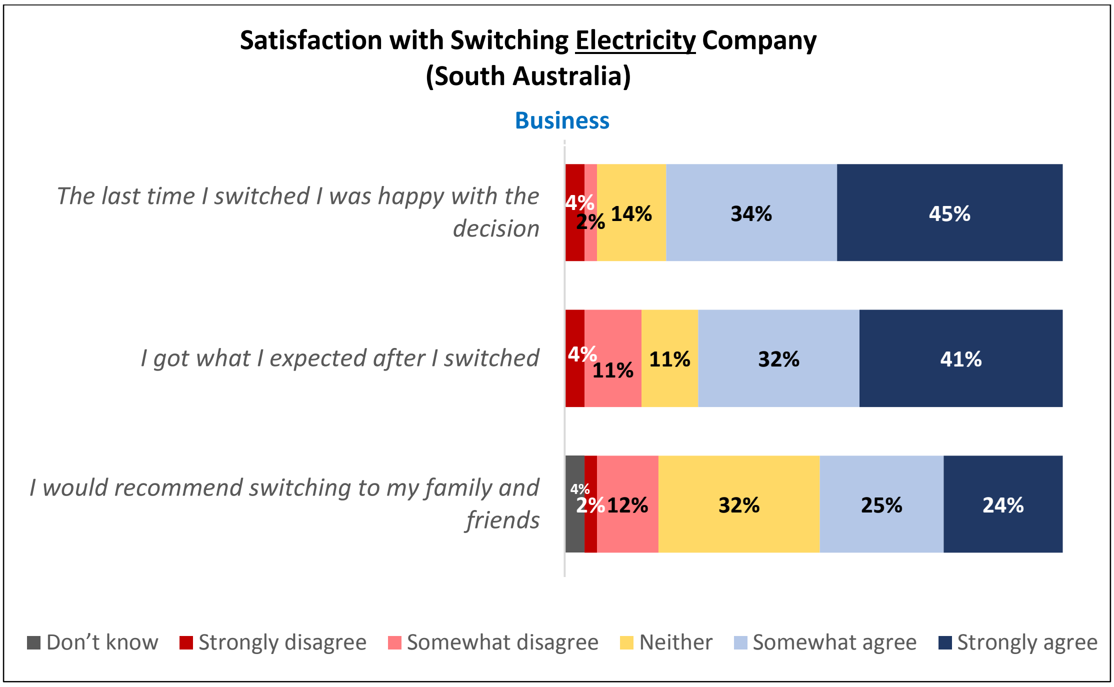


Base: Respondents who switched their gas company or plan (Residential n=70). NB: Business results not shown due to small sample size (n=1)
Q54. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your gas company or plan where 0 means not at all and 10 means extremely important?

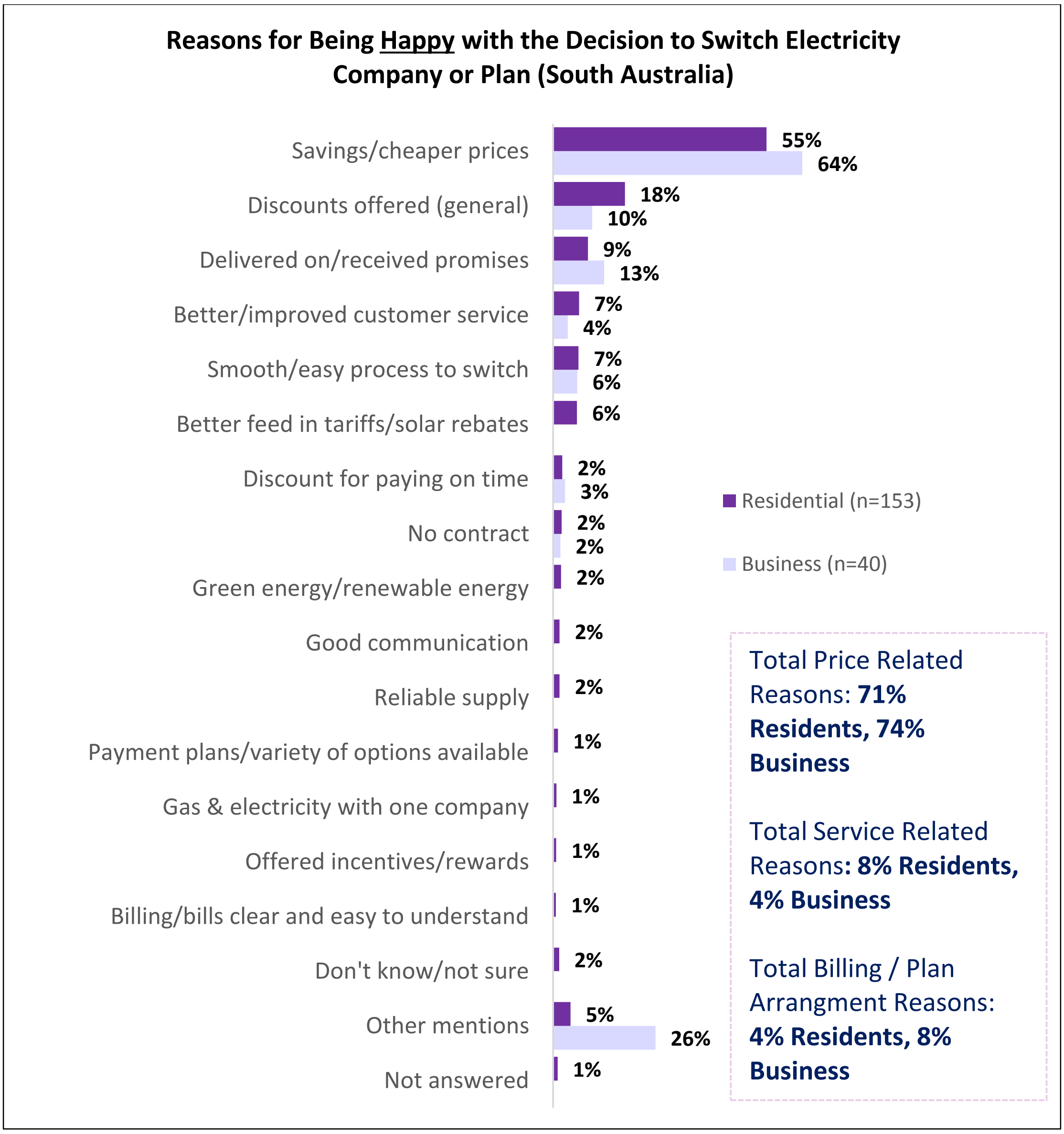
Satisfaction with Switching



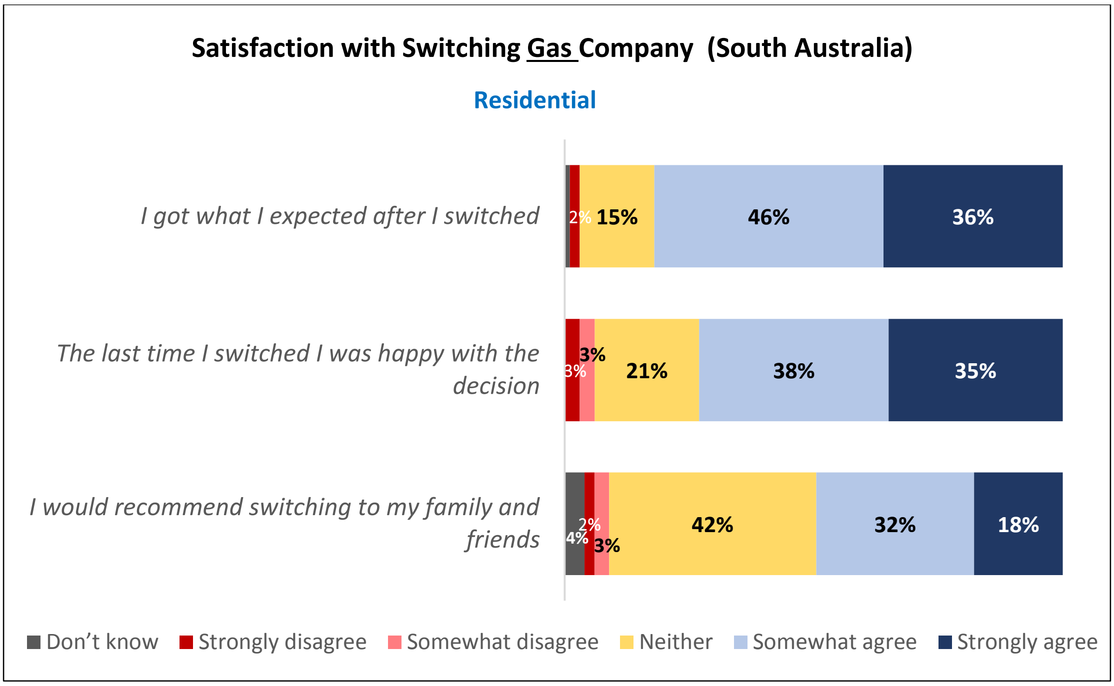
Base: Respondents who had switched their electricity company or plan (Residential n=198)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



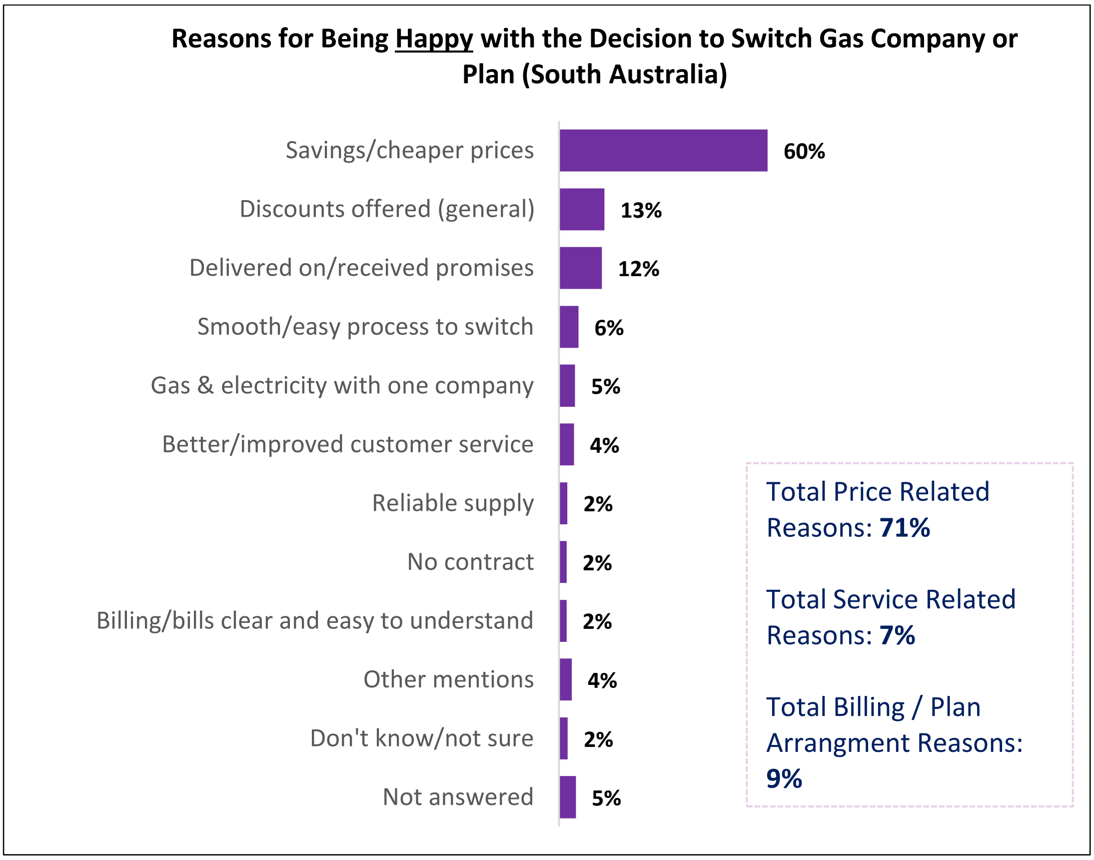
Base: Respondents who had switched their electricity company or plan (Business n=49)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



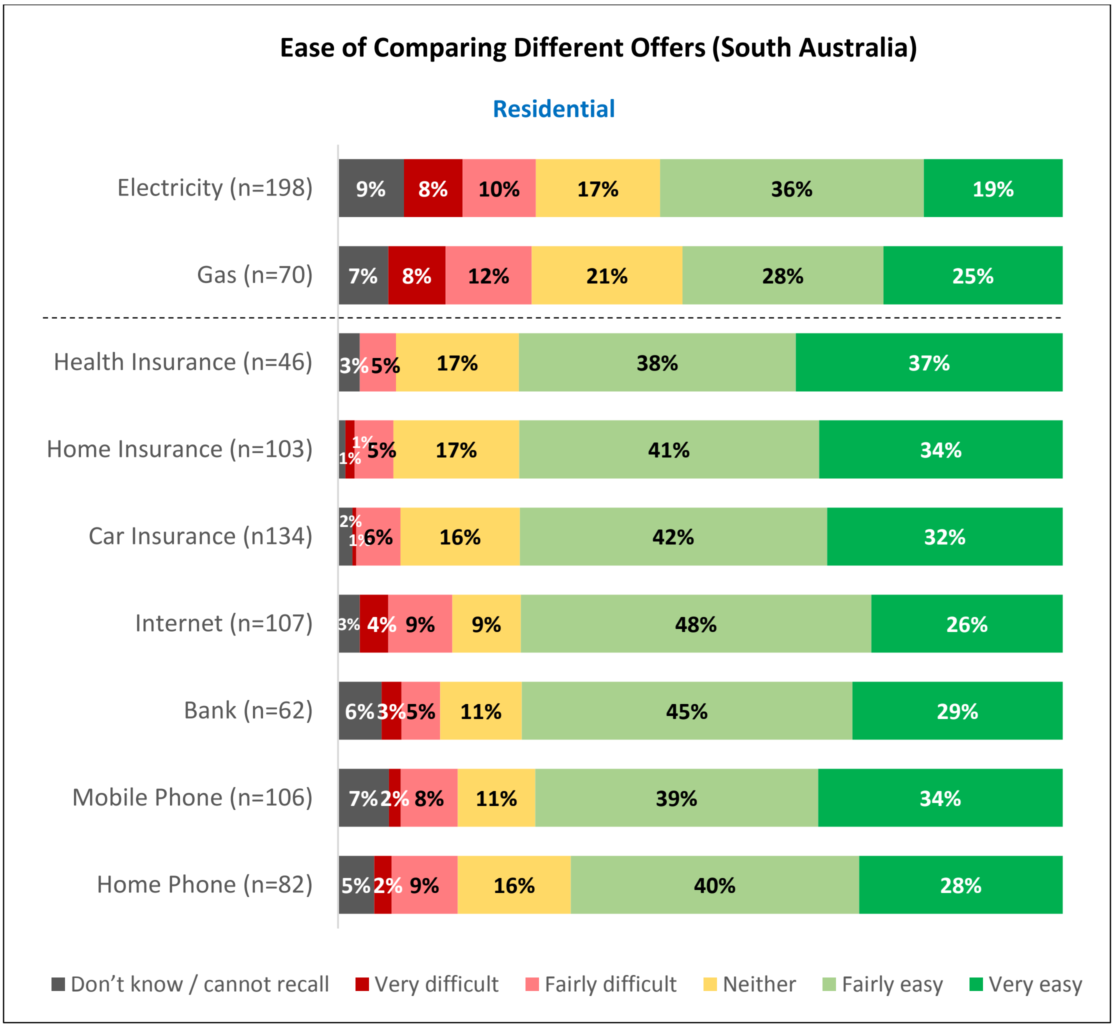
Base: Respondents who agreed they were happy with their decision to switch
Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE



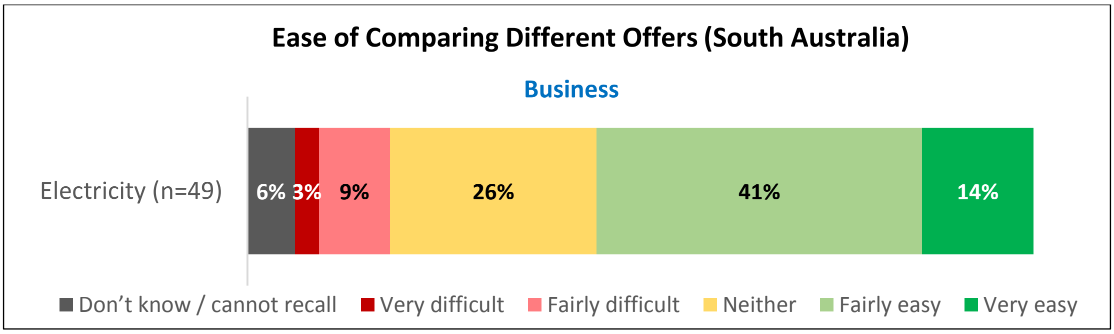
Base: Respondents who had switched their gas company or plan (Residential n=70). NB: Business results not shown due to small sample size (n=1)
Q55. And having switched your gas company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



Base: Respondents who agreed they were happy with their decision to switch (Residential: n=52). NB: Business not shown due to small sample size (n=1)
Q30B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE

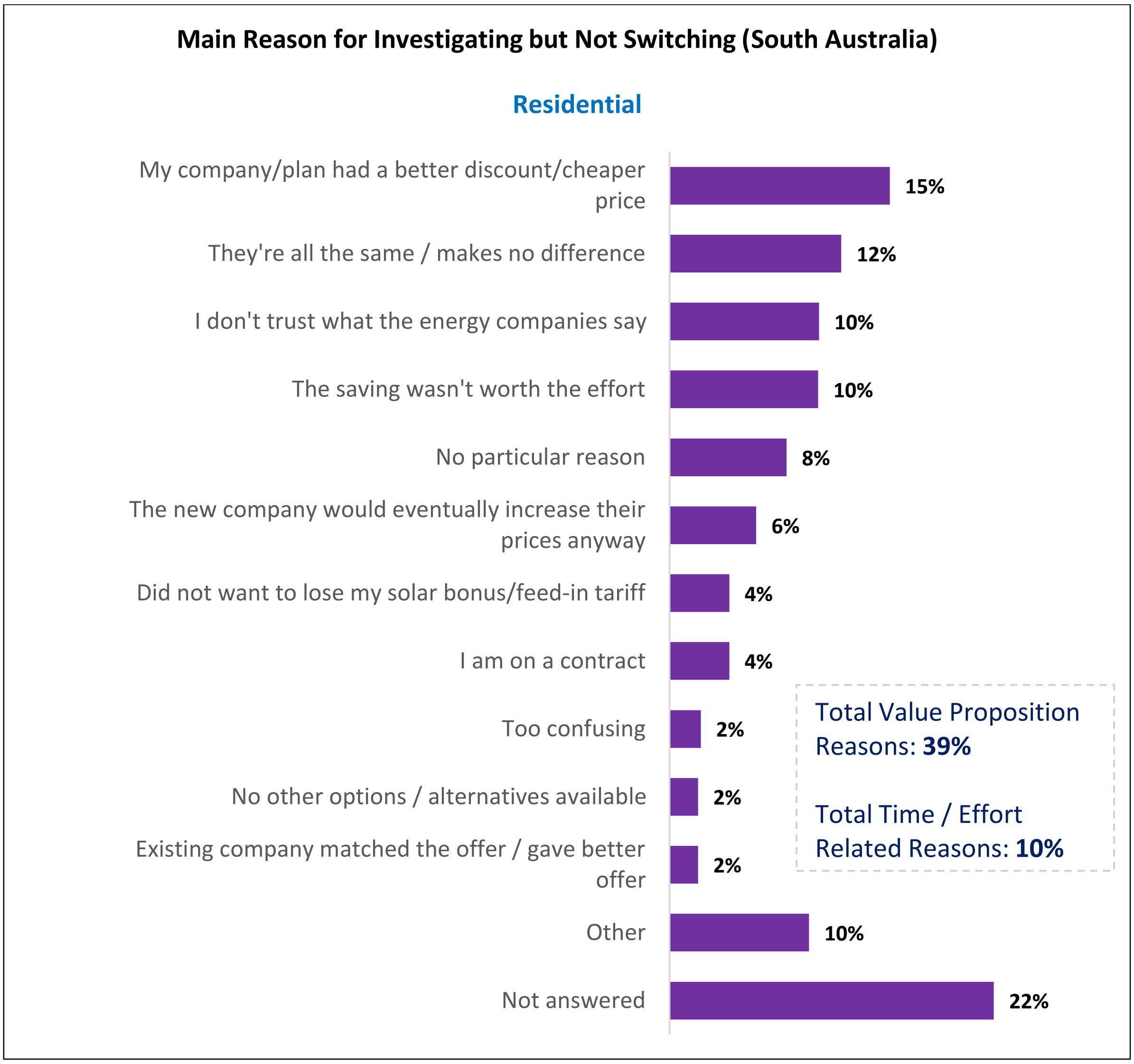


Base: Respondents who switched their company / provider or plan
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / D7a. The last time you changed your [INSERT FROM D7] provider, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

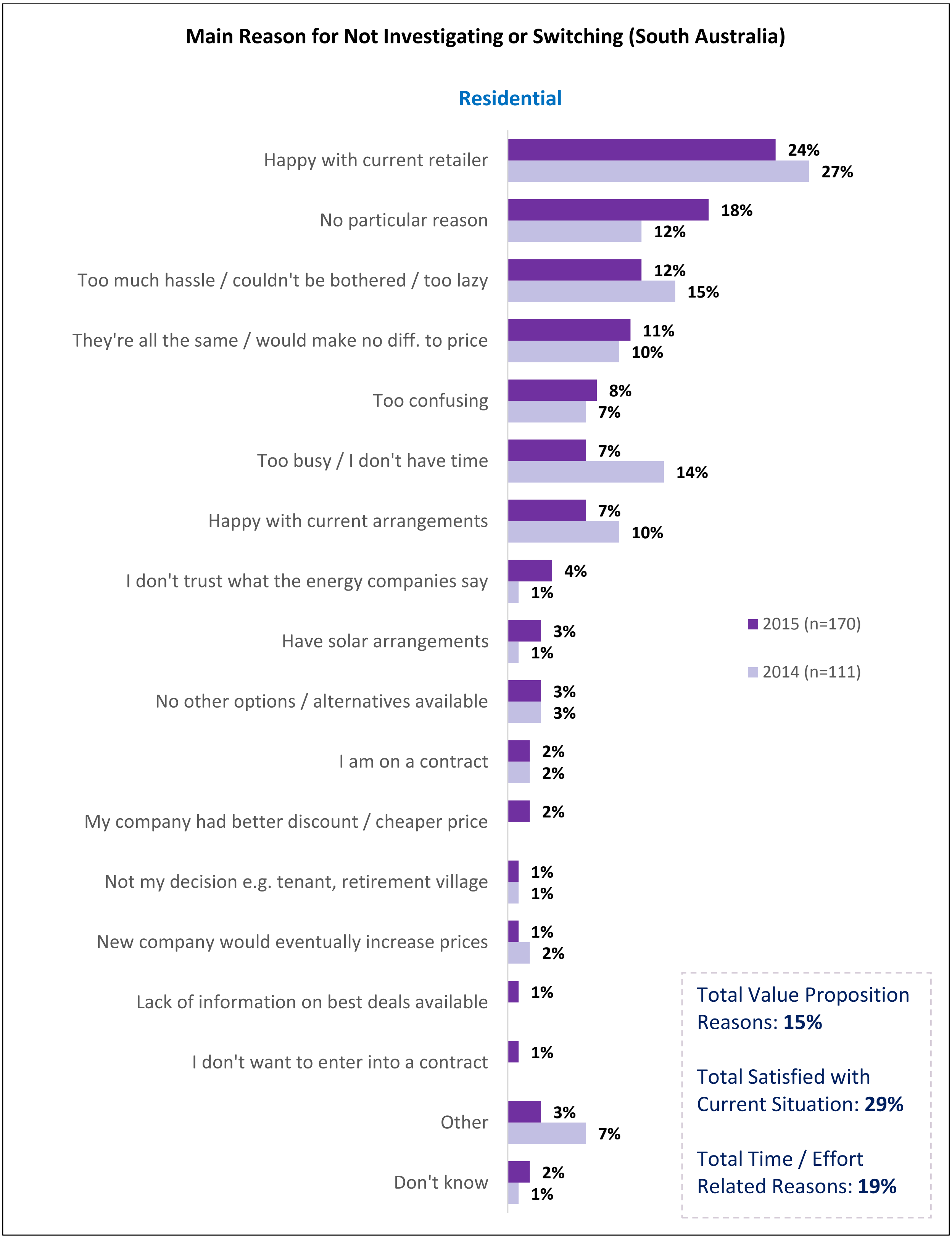


Base: Respondents who switched their company / provider or plan. NB: Results for gas not shown due to small sample size for small business (n=1)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

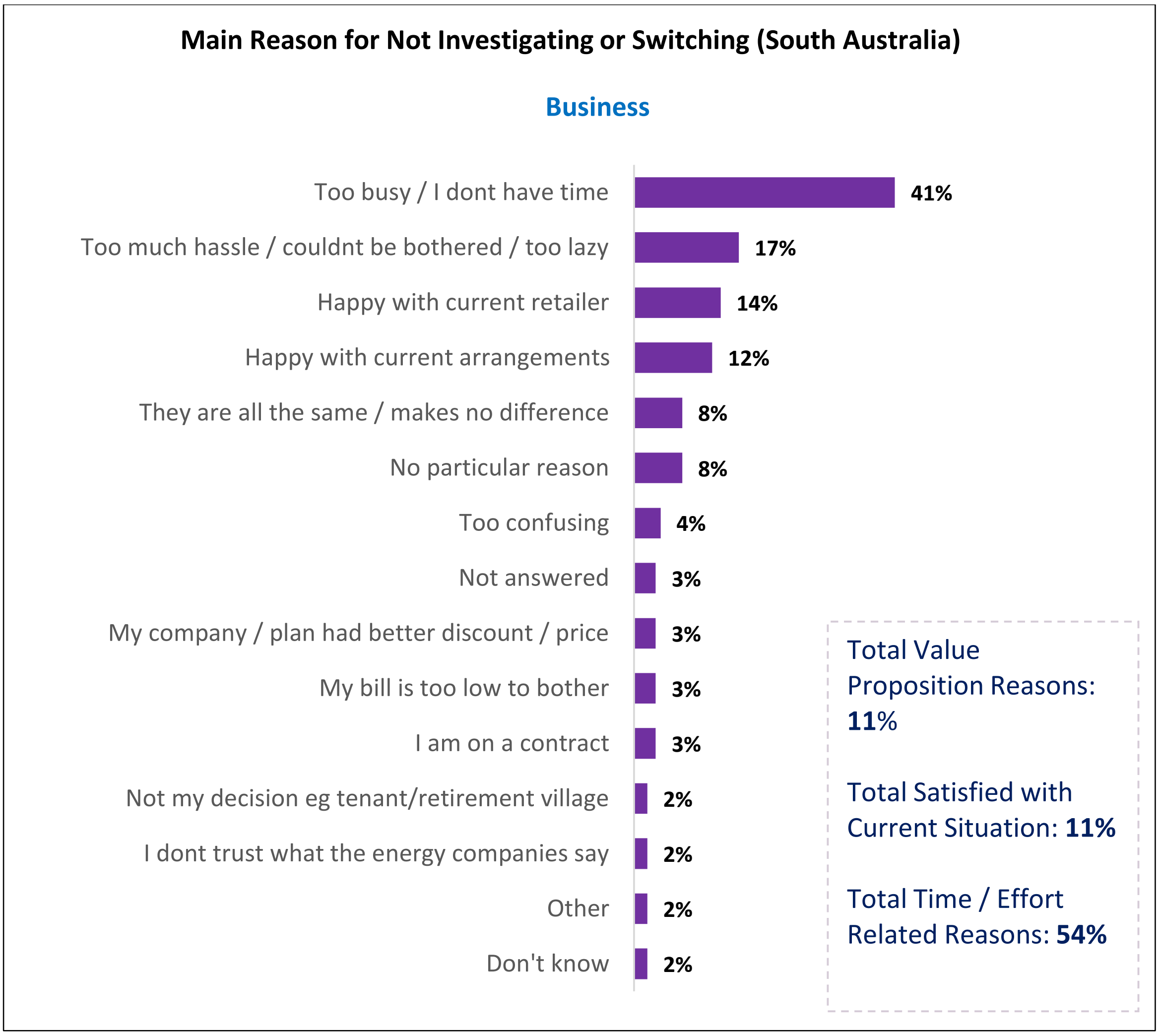
Barriers to Investigating Offers or Switching



Base: Respondents who investigated offers and options but haven't switched in the past 12 months (n=31). NB: 2014 results not shown due to small sample size (n=21). Business results not shown due to small sample size (n=16)
Q32. And what was the main reason why you investigated different offers and options but haven't changed your energy company or plan in the last 12 months? Any others? MULTIPLE RESPONSE

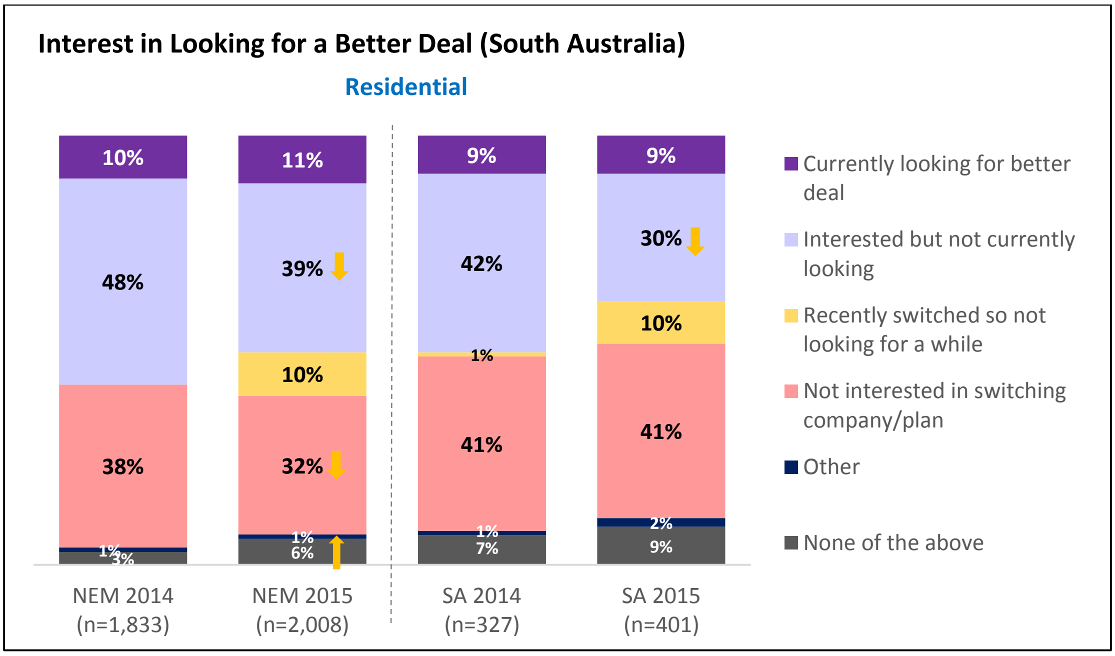


Base: Respondents who had not investigated offers and options or switched in the past 12 months Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

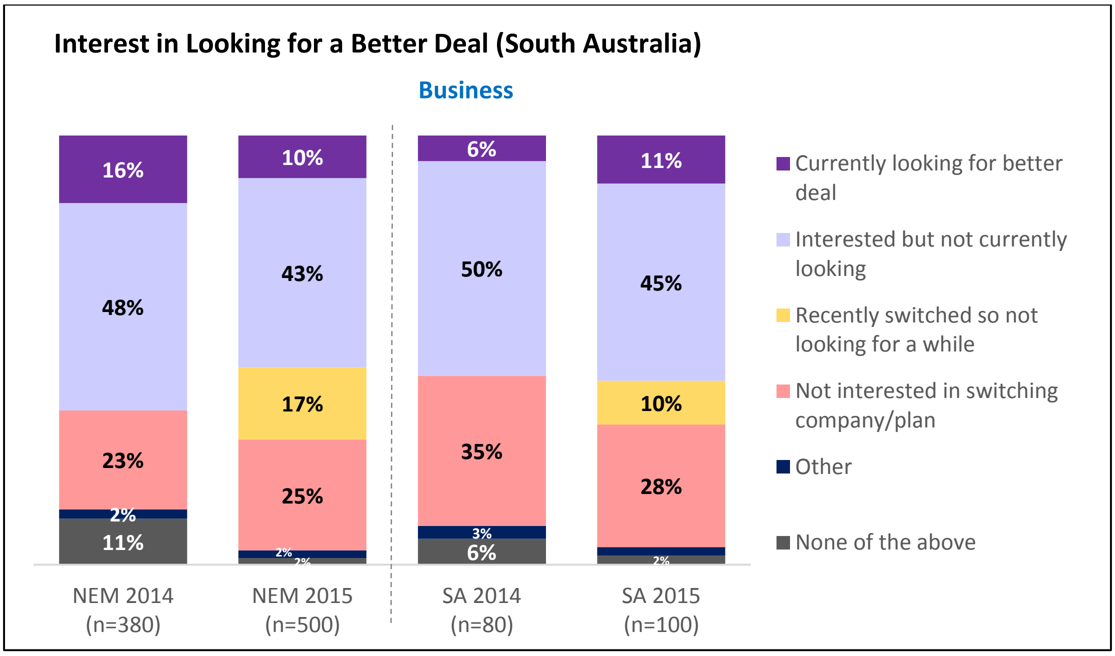


Base: Respondents who had not investigated offers and options or switched in the past 12 months (n=35). NB: 2014 results not shown due to small sample size (n=16)
Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

Switching Intentions and Attitudes



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household? (In 2014, the open-ended responses from 'other' were back coded to show those who had indicated they were 'not looking for a while because they had recently switched'. Results should not be compared directly as this option was not prompted in 2014).



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=2,008)	SA (n=401)
Total	**$207**	**$214**
Last Quarterly Electricity Bill: Less than $300	$178	$185
Last Quarterly Electricity Bill: $300-$500	$210	$236
Last Quarterly Electricity Bill: $500 or more	$247	$261

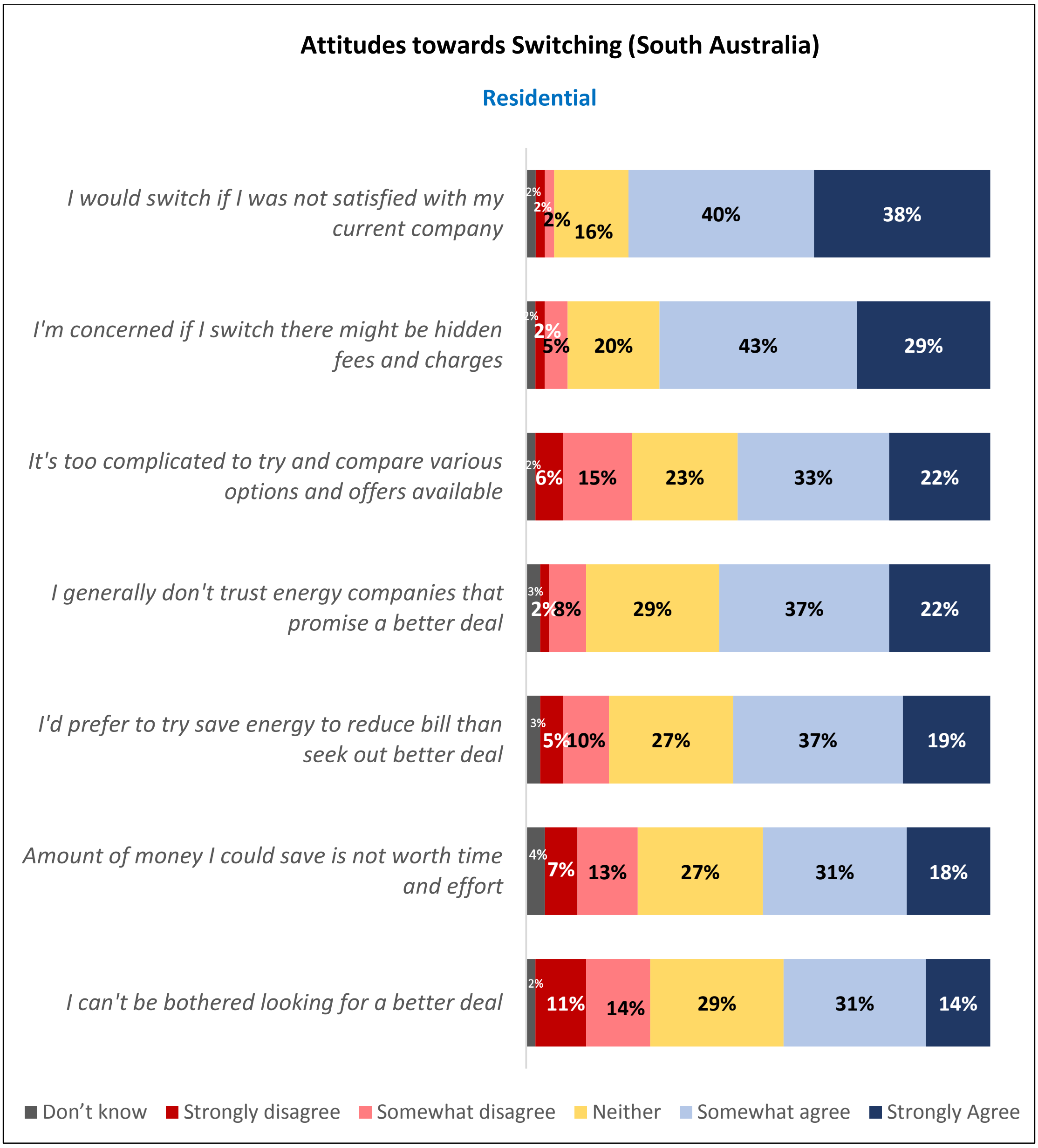
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Business	
	NEM (n=500)	SA (n=100)
Total	**$609**	**$868**
Last Quarterly Electricity Bill: Less than $500	$257	$210
Last Quarterly Electricity Bill: $500-$999	$462	$380
Last Quarterly Electricity Bill: $1,000 or more	$1,117	$1,525

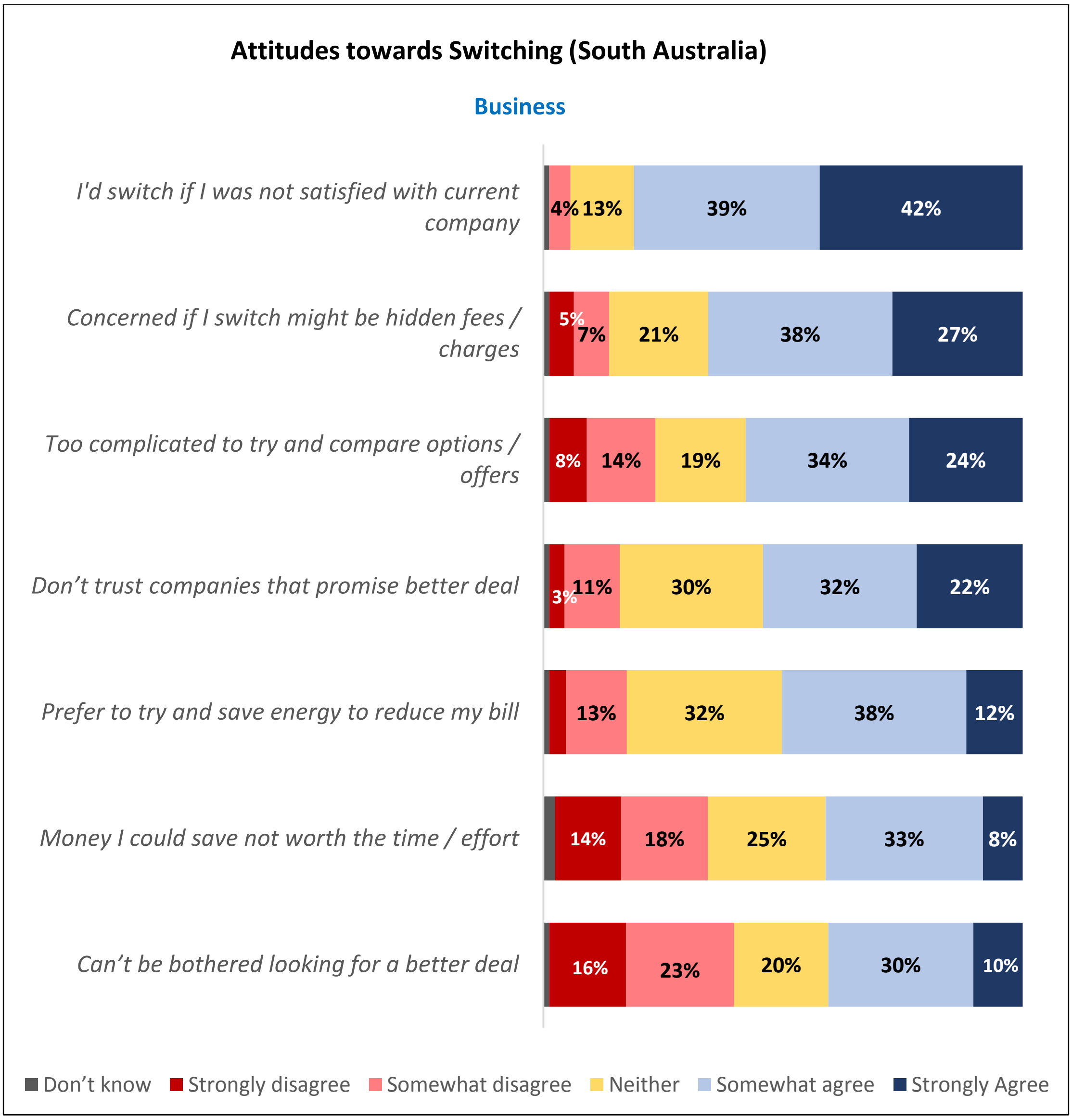
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=908)	SA (n=202)
Total	**$162**	**$170**
Last Quarterly Gas Bill: Less than $100	$120	$117
Last Quarterly Gas Bill: $100 - $300	$163	$177
Last Quarterly Gas Bill: $300 or more	$169	$170

Base: Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=23)
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?



Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=100)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

2.2.3 Consumer Satisfaction with the Market

Summary of Findings

Six in ten consumers in South Australia were satisfied with the level of market choice in their state (59% residential, 57% small business). This was comparable with the NEM average. While overall satisfaction levels remained consistent with 2014 (56% and 52% respectively), there was a significant increase in the proportion of residents who were very satisfied with the level of choice (from 13% to 21%).

Significantly higher levels of satisfaction were evident among those with mains connected gas, those who had switched and those with a lower quarterly electricity spend.

Results from the 2014 qualitative research in South Australia suggest that many consumers believed that competition was in fact one of the reasons for higher prices and that prices would stay high to account for the high churn from constant switching and retailers needing to keep trying to find new customers.

Electricity

Satisfaction with electricity companies in South Australia remained fairly consistent in 2015, with around two thirds satisfied with their current electricity company (68% of residents and 66% of small business consumers).

Around two thirds of residential consumers (65%) and just under half of small business consumers (47%) rated the overall quality of customer service provided by their electricity company quite highly (rating of 7 or more out of 10).

Among residential consumers, ratings of overall value for money were significantly higher this year with 58% giving a rating of seven or more compared to 49% in 2014. This increase was consistent with an overall increase across in the NEM average. Although not statistically significant, ratings were slightly lower among small business consumers in 2015 (40% vs. 54% in 2014 rating a 7 or more out of 10).

Residential consumers with lower electricity bills gave significantly higher ratings of their electricity company. Those experiencing financial difficulty paying their bills gave significantly lower ratings.

Gas

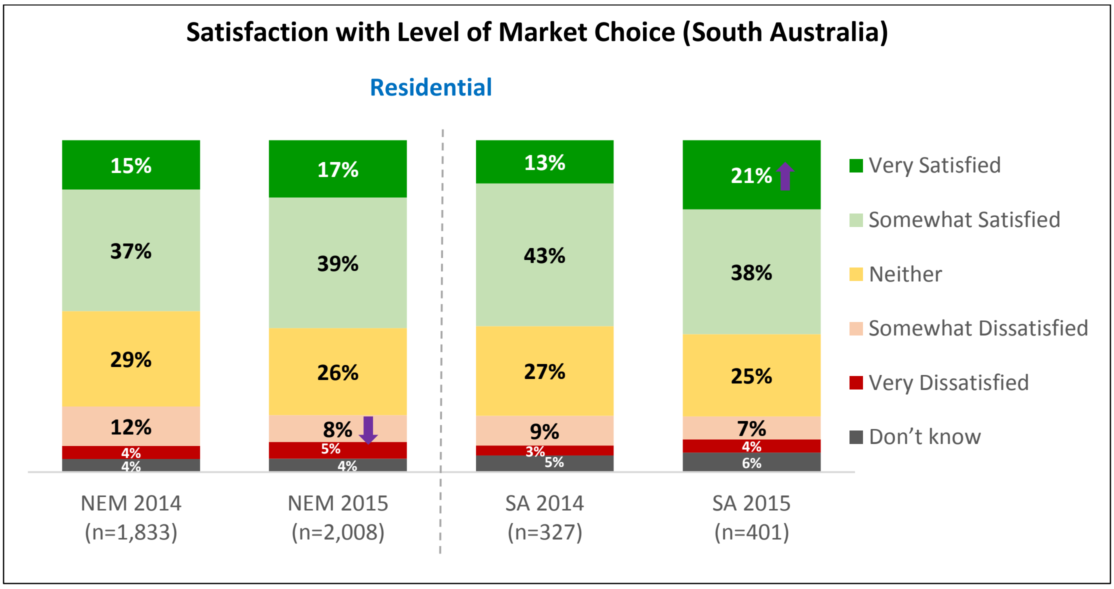
Seven in ten consumers (69% residential) were very or somewhat satisfied with their current gas company and a similar proportion (68%) rated the overall quality of customer service provided by their gas company quite highly (7 or more out of 10). These results were very consistent with the NEM averages.

When it came to the value for money provided by their current gas company, consumers in South Australia were significantly more satisfied this year (63% rated 7 or more, up from 47% in 2014). This increase was consistent with an overall increase across in the NEM average.

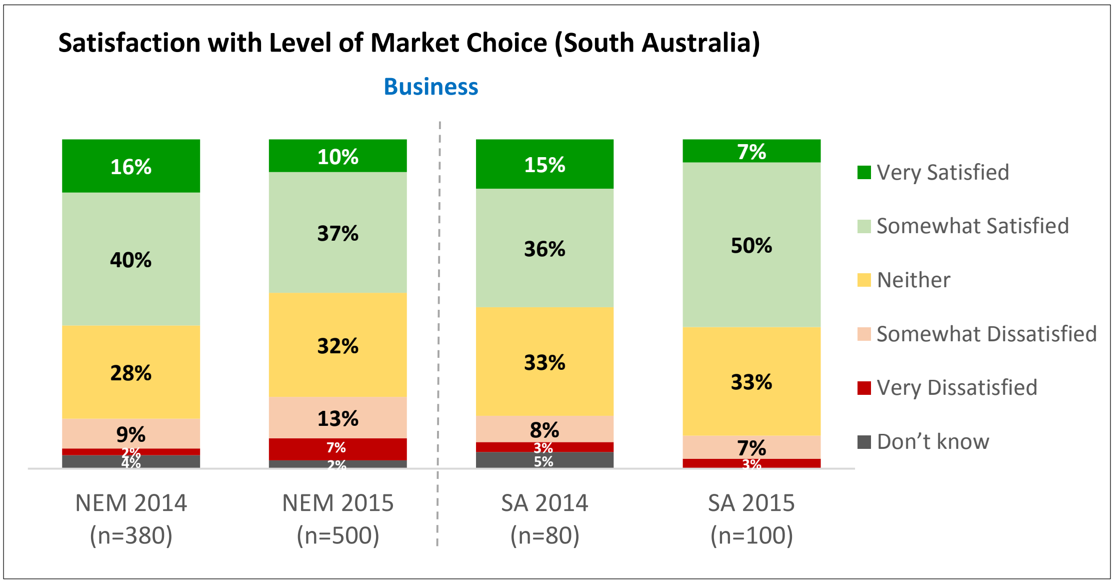
As was the case with electricity company ratings, those with lower electricity bills gave significantly higher ratings of their gas company. Note in South Australia, four in ten residents (40%) had the same electricity and gas company.

The Results

Satisfaction with Level of Choice

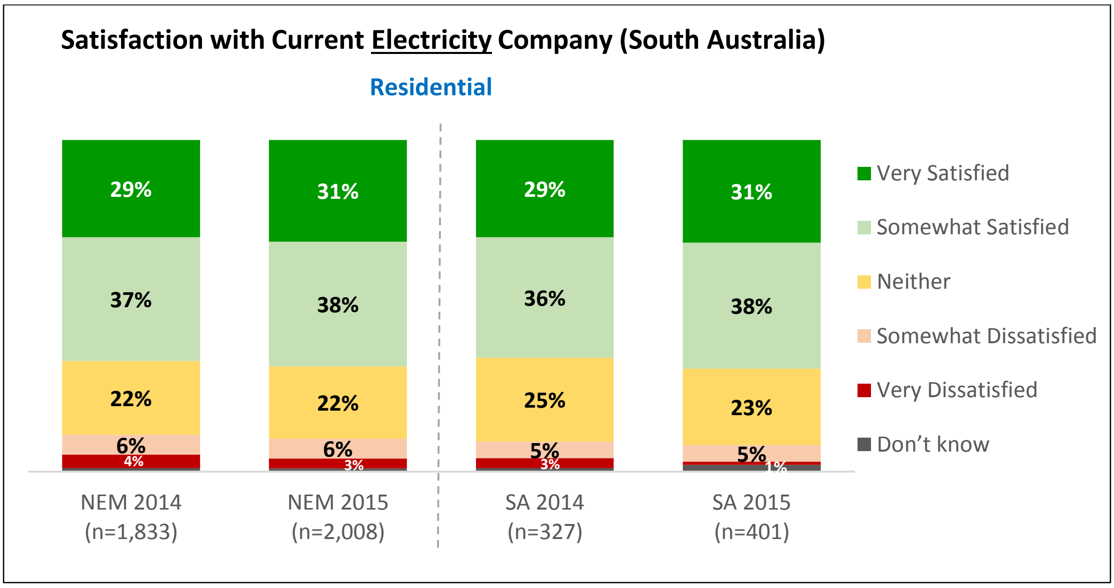


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

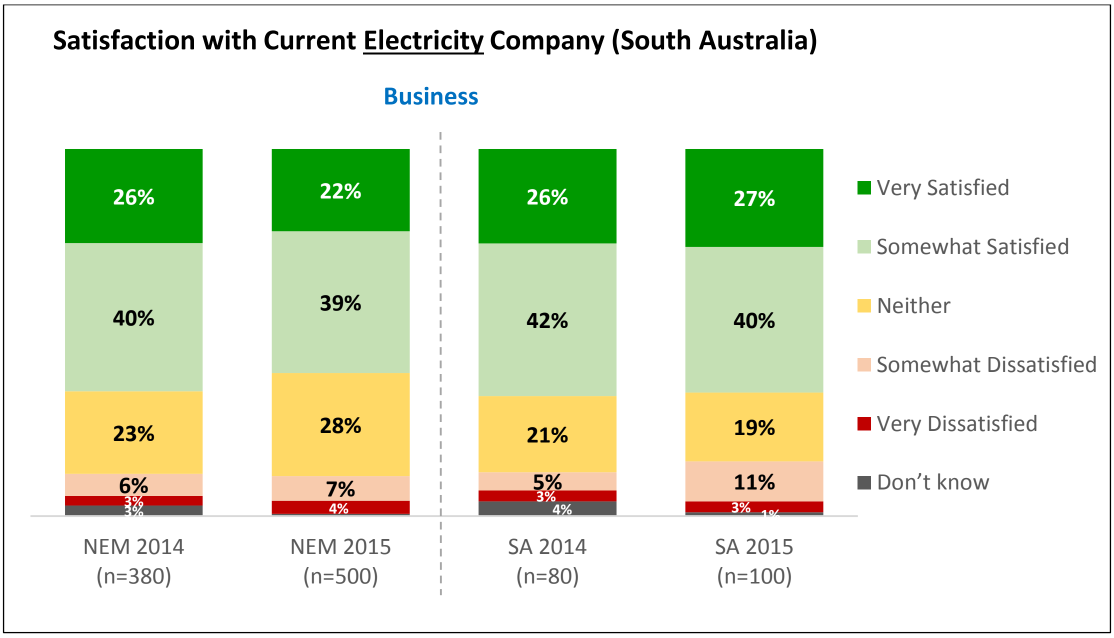


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

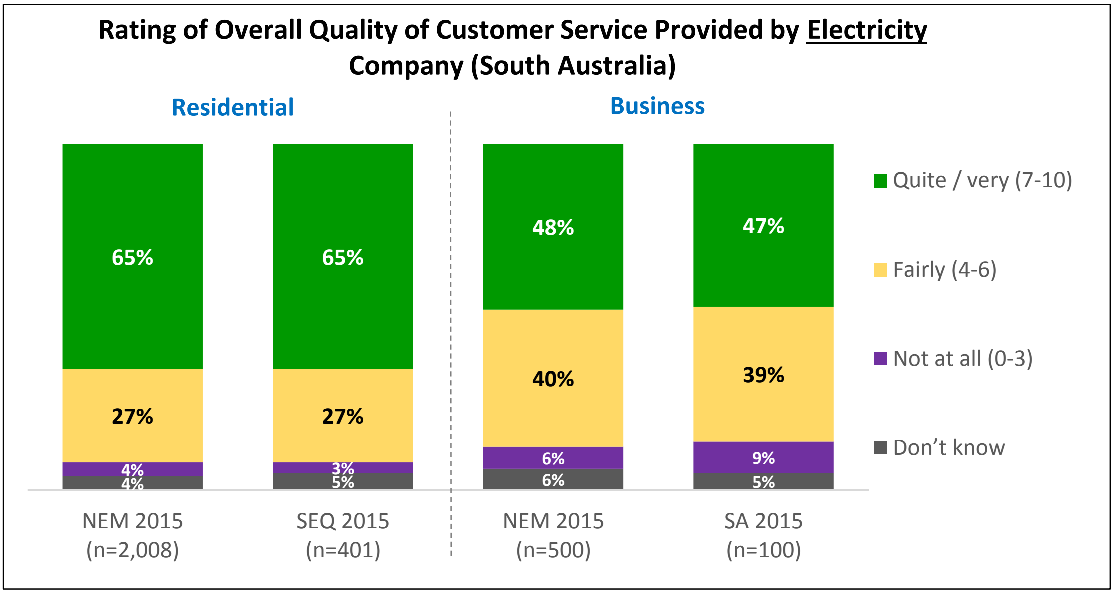
Satisfaction with Electricity Companies



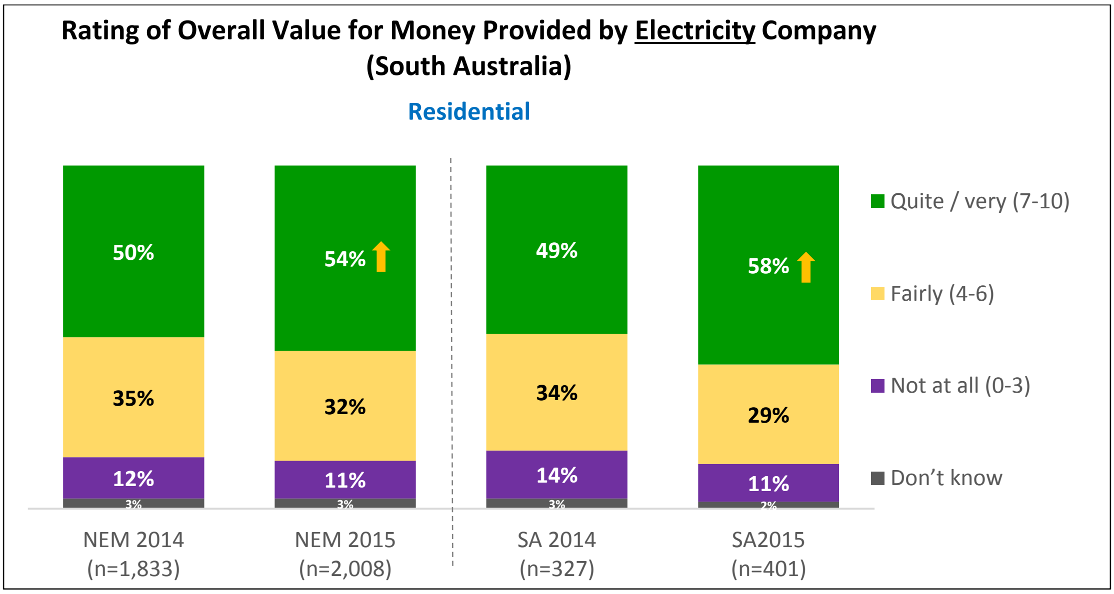
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



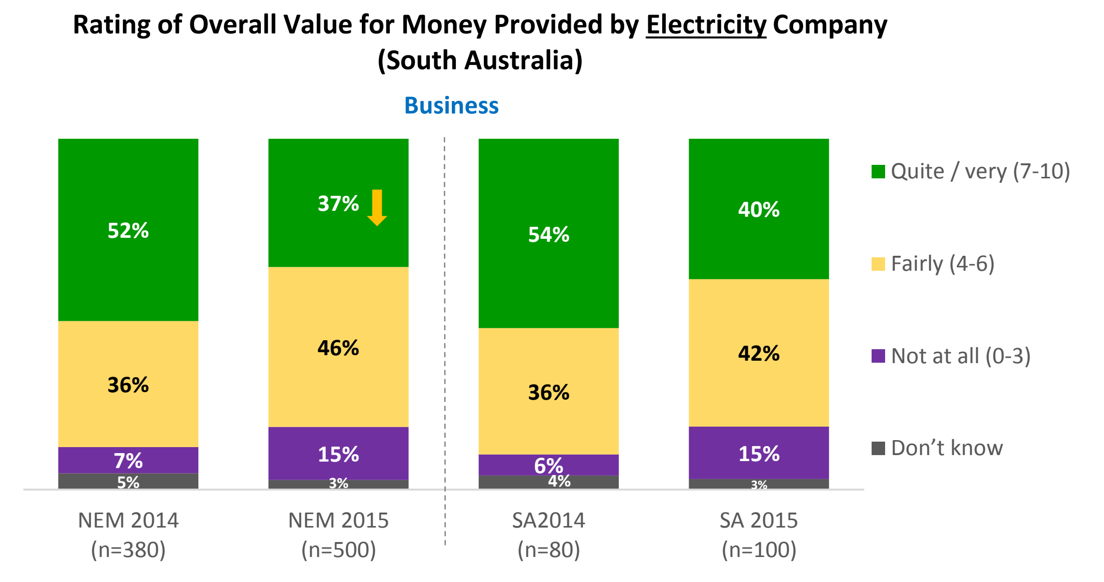
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



Base: All Respondents
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

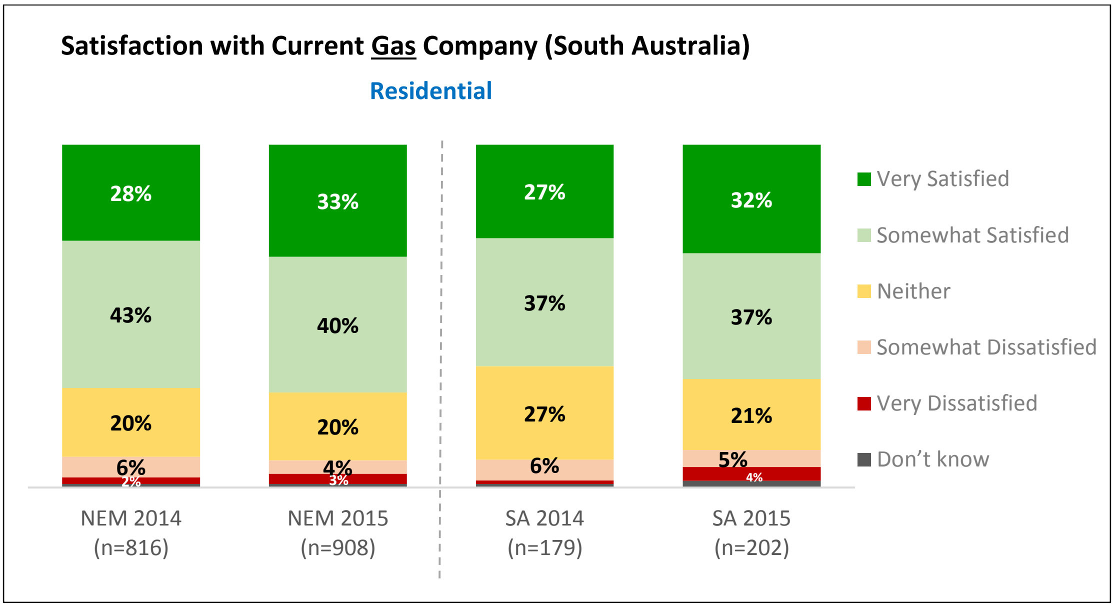


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

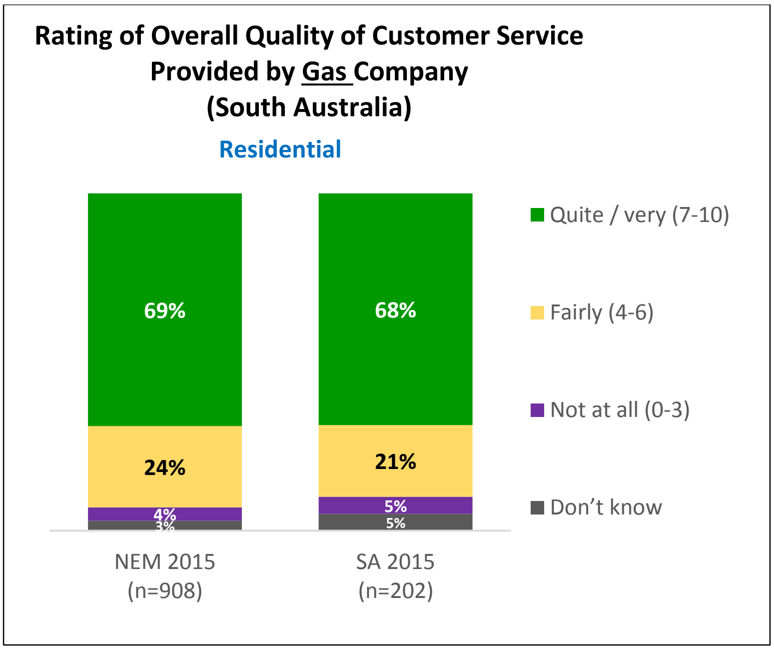


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

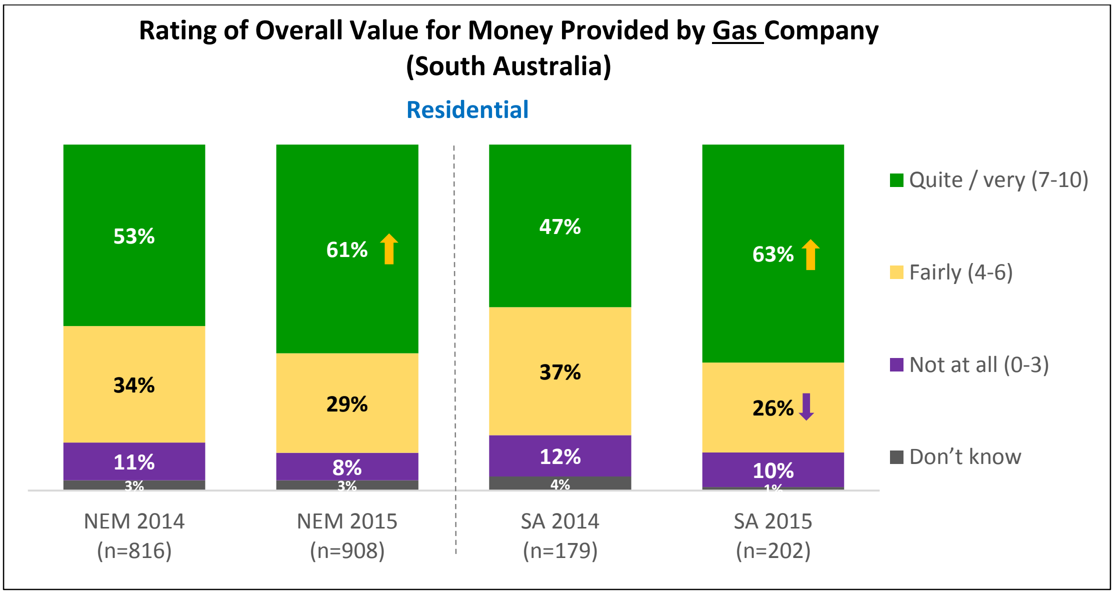
Satisfaction with Gas Companies



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=23)
Q7. And how satisfied are you with your current gas company?



Base: All Respondents. NB: Business results not shown due to small sample size (n=23)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=202)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

2.2.4 Information Sources and Gaps

Summary of Findings

The internet remained the <u>most used</u> information source to help consumers switch energy company or plan or investigate offers for electricity (40% residential, 32% small business internet based sources in total) and gas (45% of residents). It was also the main information source used among residents who had investigated different options and offers but had not switched (57%).

In 2015, survey respondents were also asked which information source they thought was <u>most useful</u> for switching energy company or plan or for investigating offers. Among switchers internet based sources were most useful (32% residential and small business for electricity, 36% residential for gas) followed by looking at the best price or saving (10% residential, 11% small business for electricity, 13% residential for gas). This was also the case for those who had investigated offers but not switched.

Consistent with 2014 and with other NEM jurisdictions the <u>most preferred</u> information sources for finding information about different energy retailers and plans in general were also internet based sources (71% of residents, 84% of small business consumers).

When prompted, one in four residential consumers (41%) and half of business consumers (50%) who had switched electricity company or plan and around one in four residential consumers who had switched gas company or plan (39%) said they had used a price fact sheet to understand the details of the electricity offer when they switched. Among residents who had investigated offers but had not switched over half (56%) said they had used a price fact sheet. There were no unprompted mentions of using a price fact sheet to investigate or compare energy offers.

When it comes to confidence in finding the right information to choose a suitable energy plan, just over half of residential consumers (54%) and four in ten business consumers (44%) were quite or very confident (rating 7 or more out of 10). This result is consistent with the NEM average. When considering confidence in finding the right information it is important to note that the 2014 qualitative research suggested that confidence levels tended to be overstated.

Consistent with other NEM jurisdictions there is a very strong relationship between confidence in choosing the right energy offer and confidence in finding the right information (correlation of 0.76).

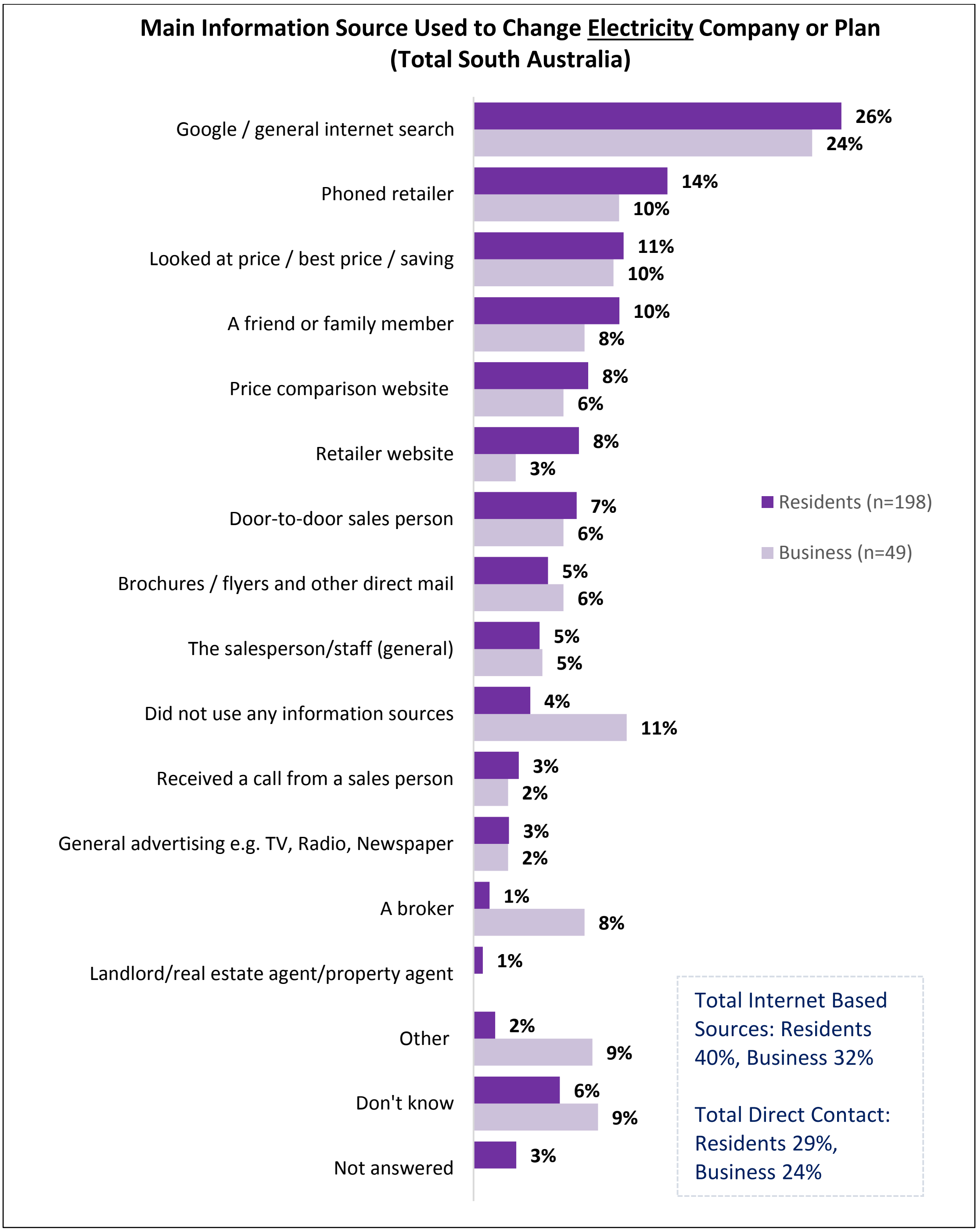
Unprompted awareness of comparison websites among residents was consistent with 2014 results, with the majority of residential consumers (72%) unable to name any comparison sites at all and a further 4% aware there were comparison sites but not able to recall any specific names. iSelect was the most commonly mentioned comparison site (6%) followed by Compare the Market (4% up significantly from 2% in 2014), GoSwitch (3%) and Choosi (2%).

Although not statistically significant, unprompted awareness of comparison websites among small business consumers declined in 2015 with the majority (81% up from 64% in 2014) unable to name any comparison sites at all.

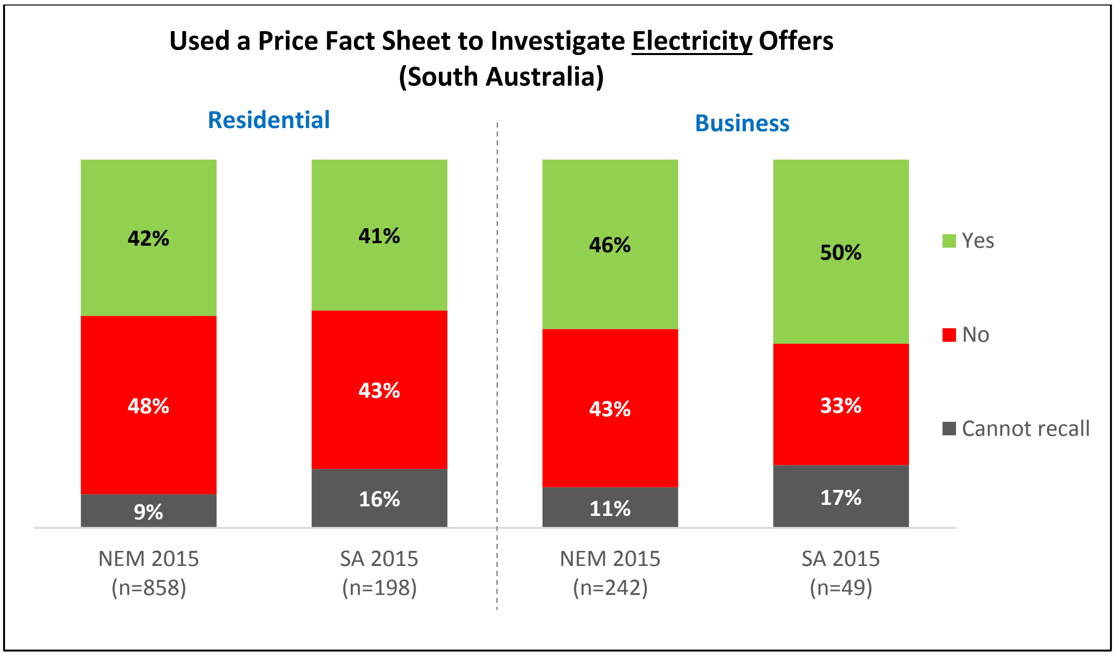
Consistent with 2014 findings, when prompted, around one in ten consumers (13% residential and small business consumers) had heard of the *energymadeeasy* website. Without prompting, 1% of residential consumers and 2% of small business consumers had heard of it.

The Results

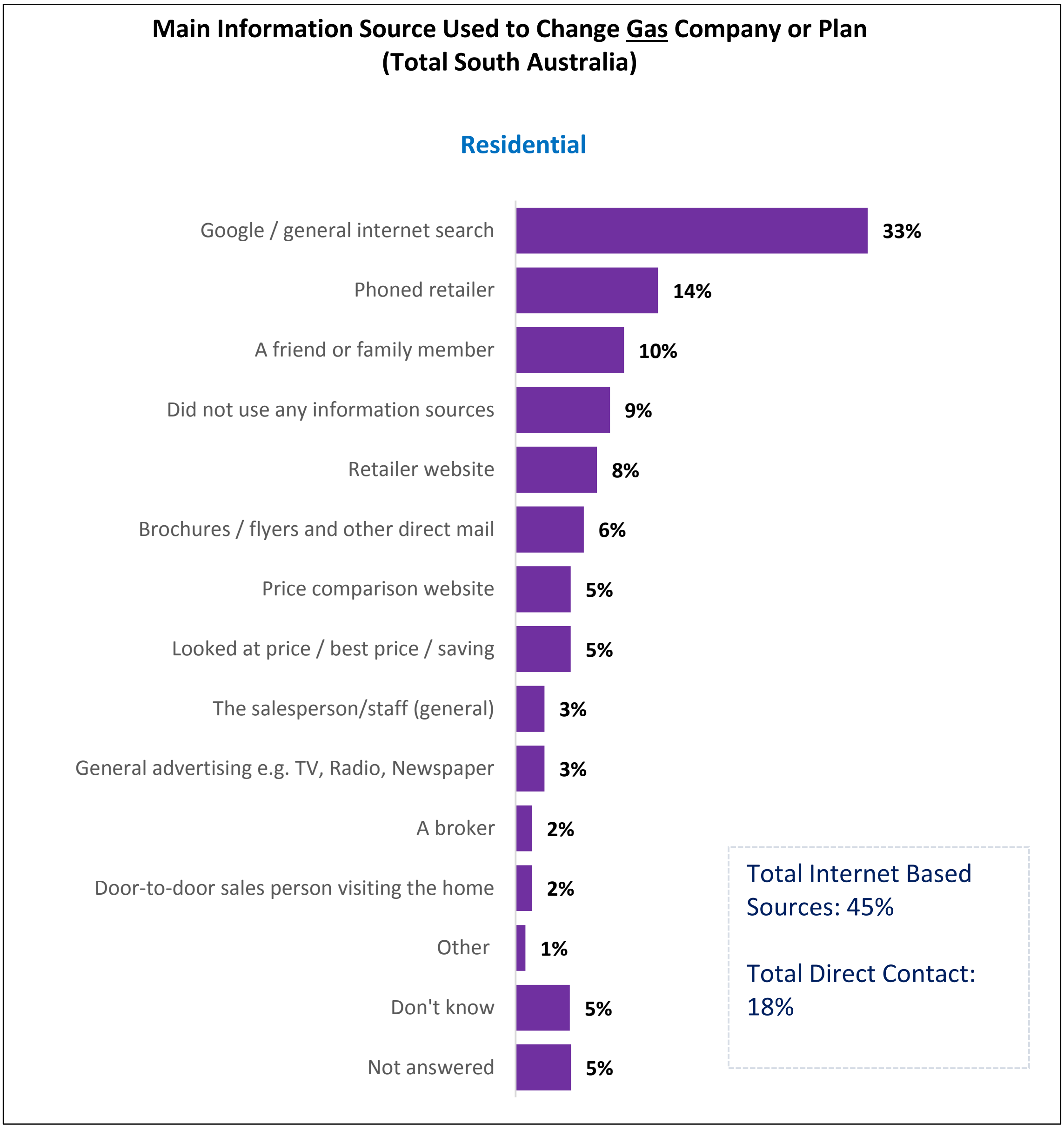
Information Sources Used to Investigate Offers or Switch



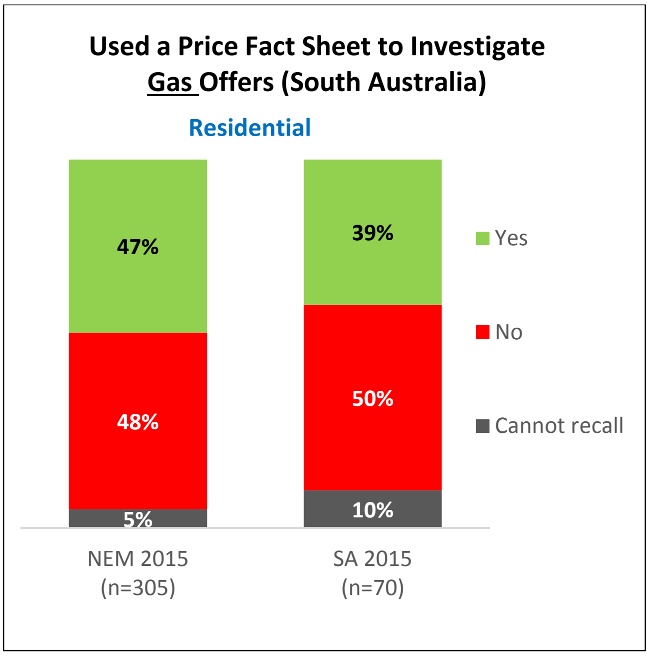
Base: Respondents who had switched electricity company or plan in the past five years
Q23. The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



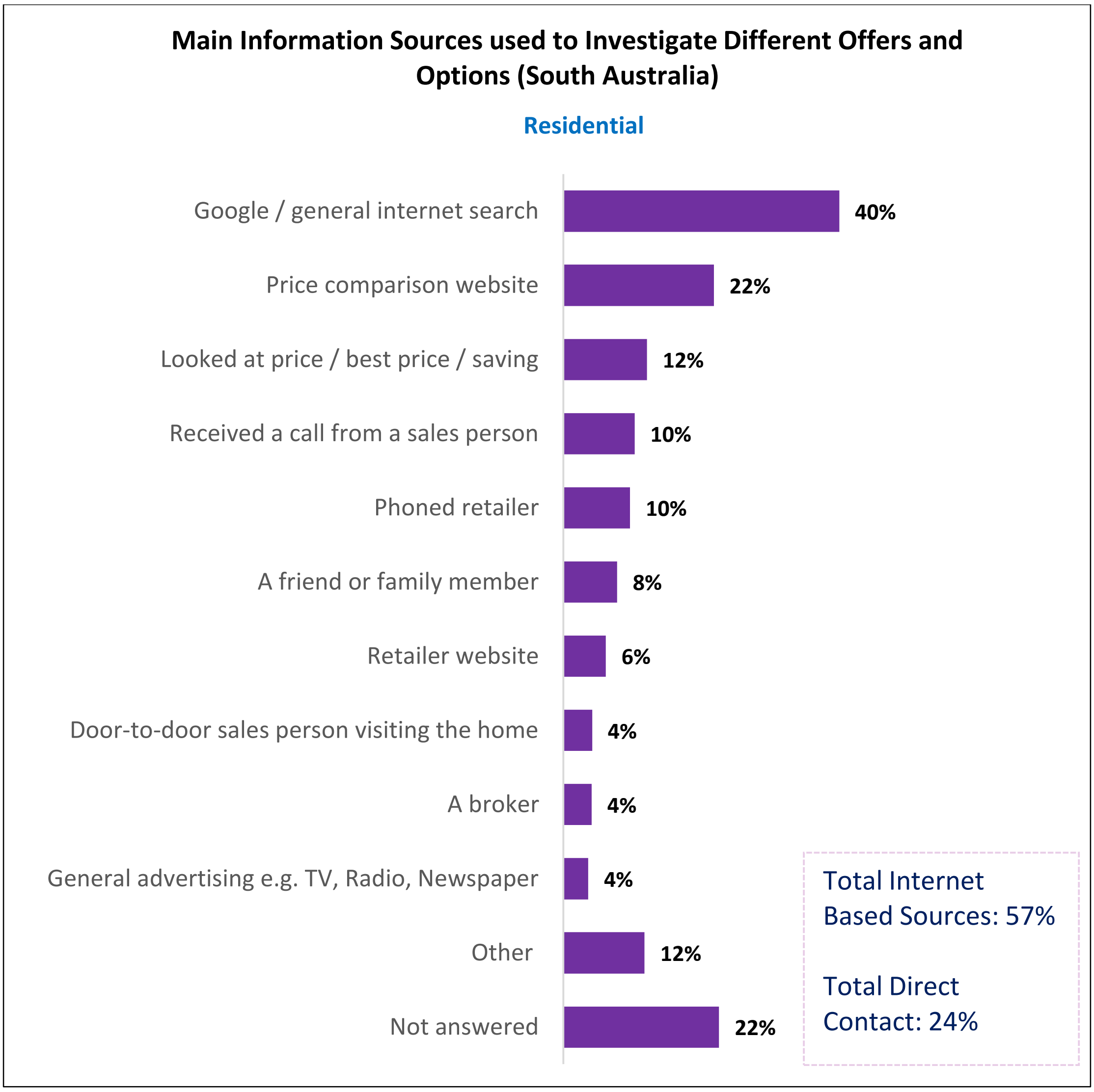
Base: Respondents who had switched electricity company or plan in the last five years
Q48. The last time you investigated changing your electricity company or plan, did you use a price fact sheet to understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.



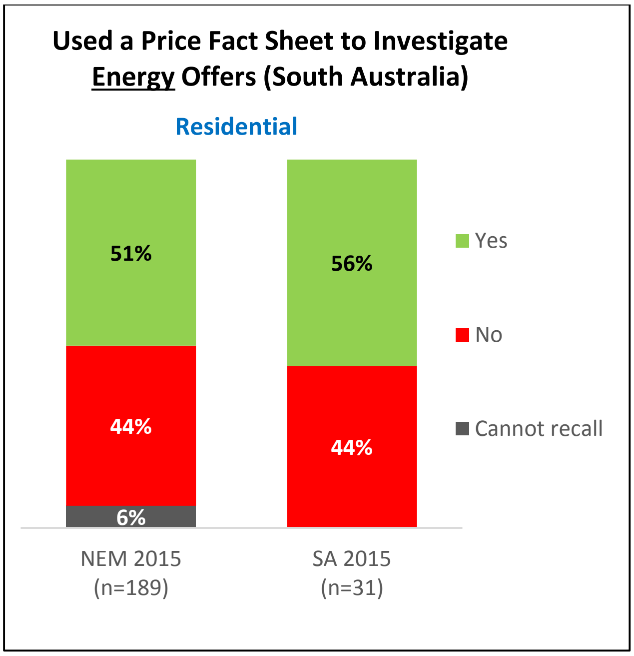
Base: Respondents who had switched gas company or plan in the past five years (n=70). NB: Business results not shown due to small sample size (n=1)
Q28. The last time you changed your gas company or plan, what information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



Base: Respondents who had switched gas company or plan in the last five years. NB: Business results not shown due to small sample size (n=1)
Q53. The last time you investigated changing your gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

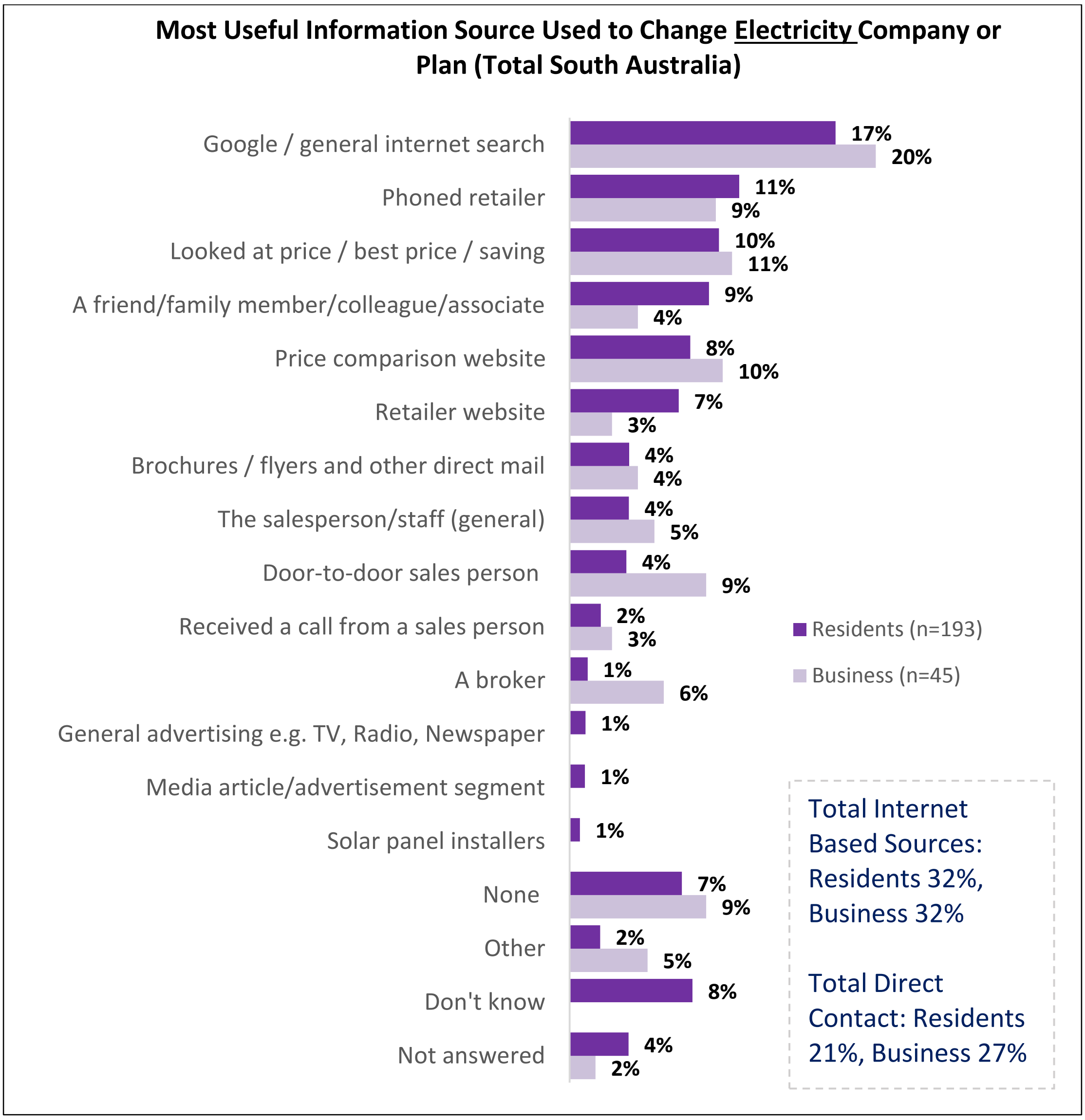


Base: All Residential Respondents who had investigates offers or options (n=31) NB. Business results not shown due to small sample size (n=16)
Q31. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your investigation? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE

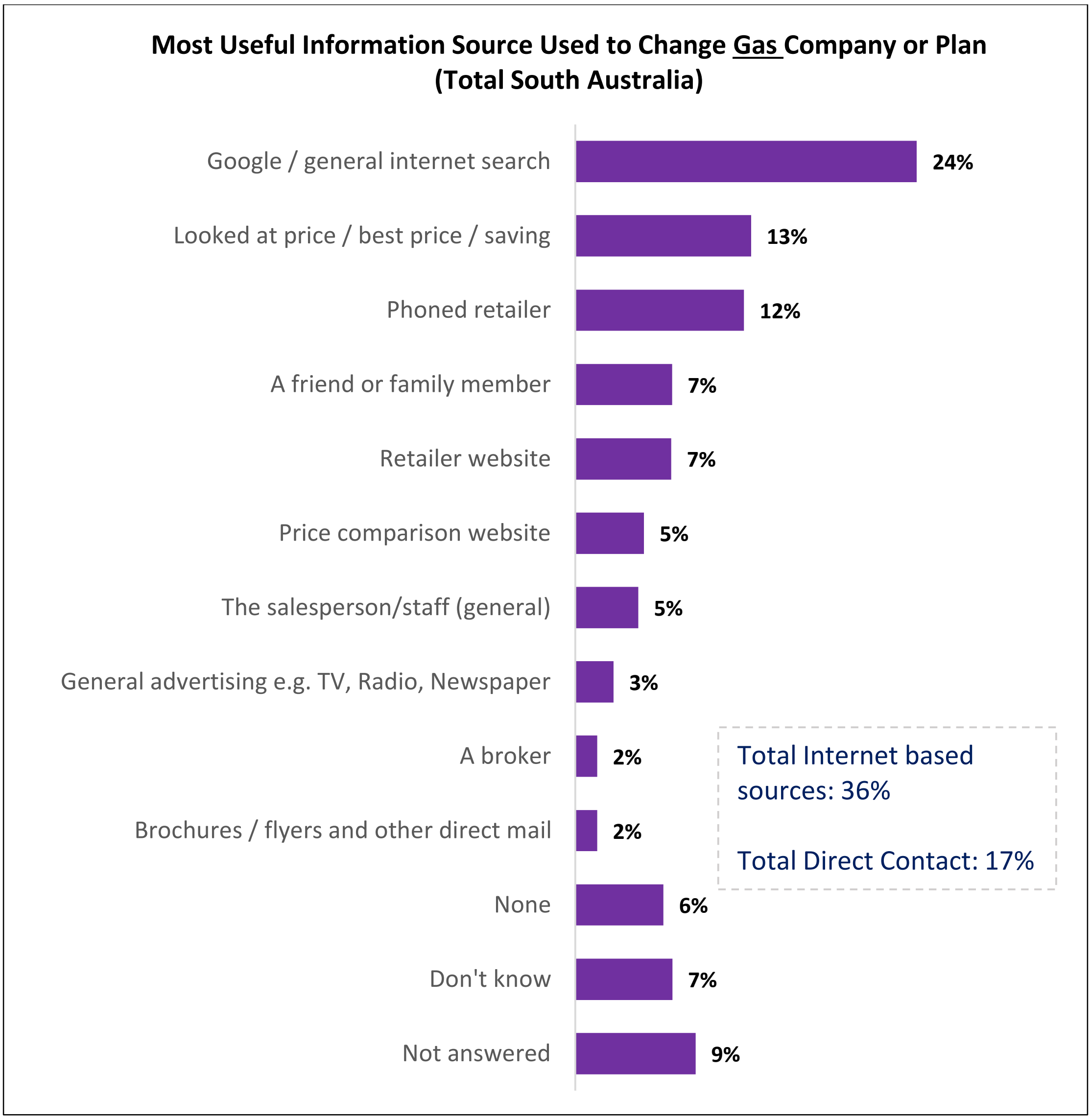


Base: Respondents who had not switched company or plan in the past five years but had investigated different options in the last 12 months. NB: Business results not shown due to small sample size (n=16)
Q58. The last time you investigated changing your electricity or gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

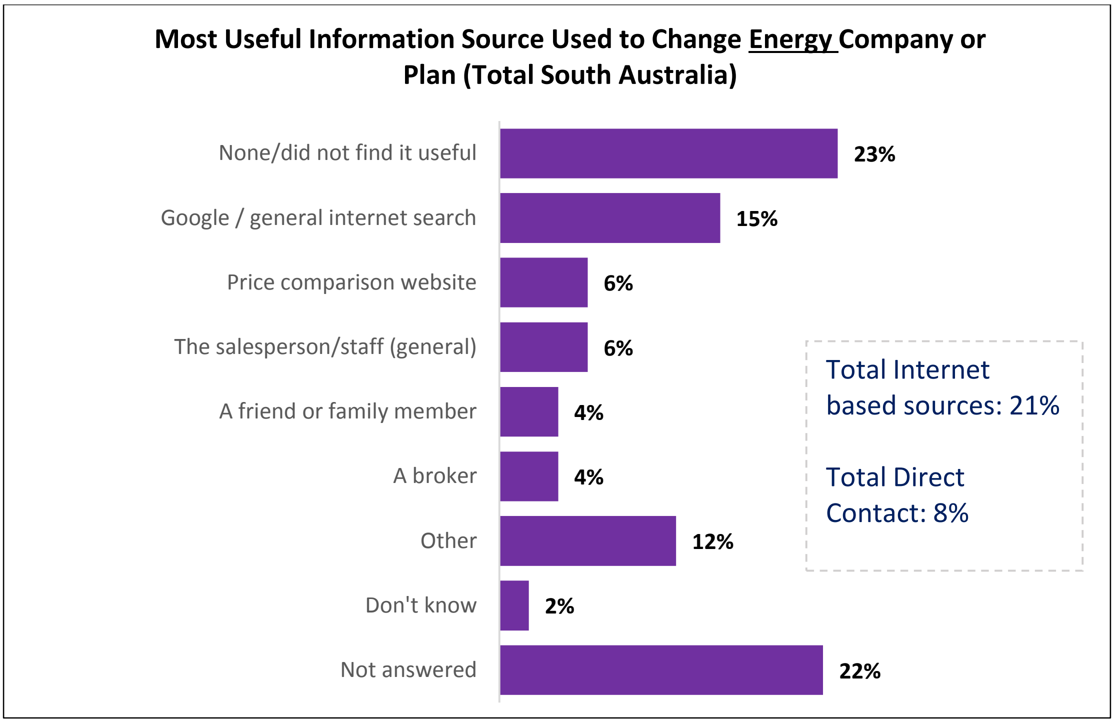
Most Useful Information Sources



Base: Respondents who had switched electricity company or plan in the last five years
Q47. And thinking about the information sources you used when changing your electricity company or plan, which one was most useful in helping with your decision to switch?

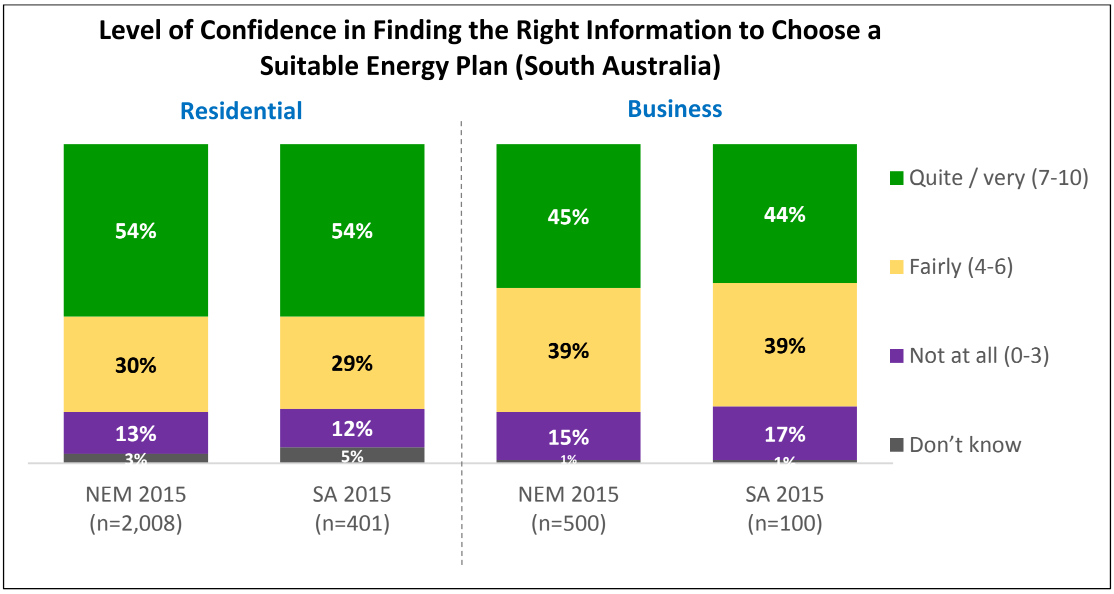


Base: Residential Respondents who had switched gas company or plan in the last five years (n=70). NB: Business results not shown due to small sample size (n=1)
Q52. And thinking about the information sources you used when changing your gas company or plan, which one was most useful in helping with your decision to switch?



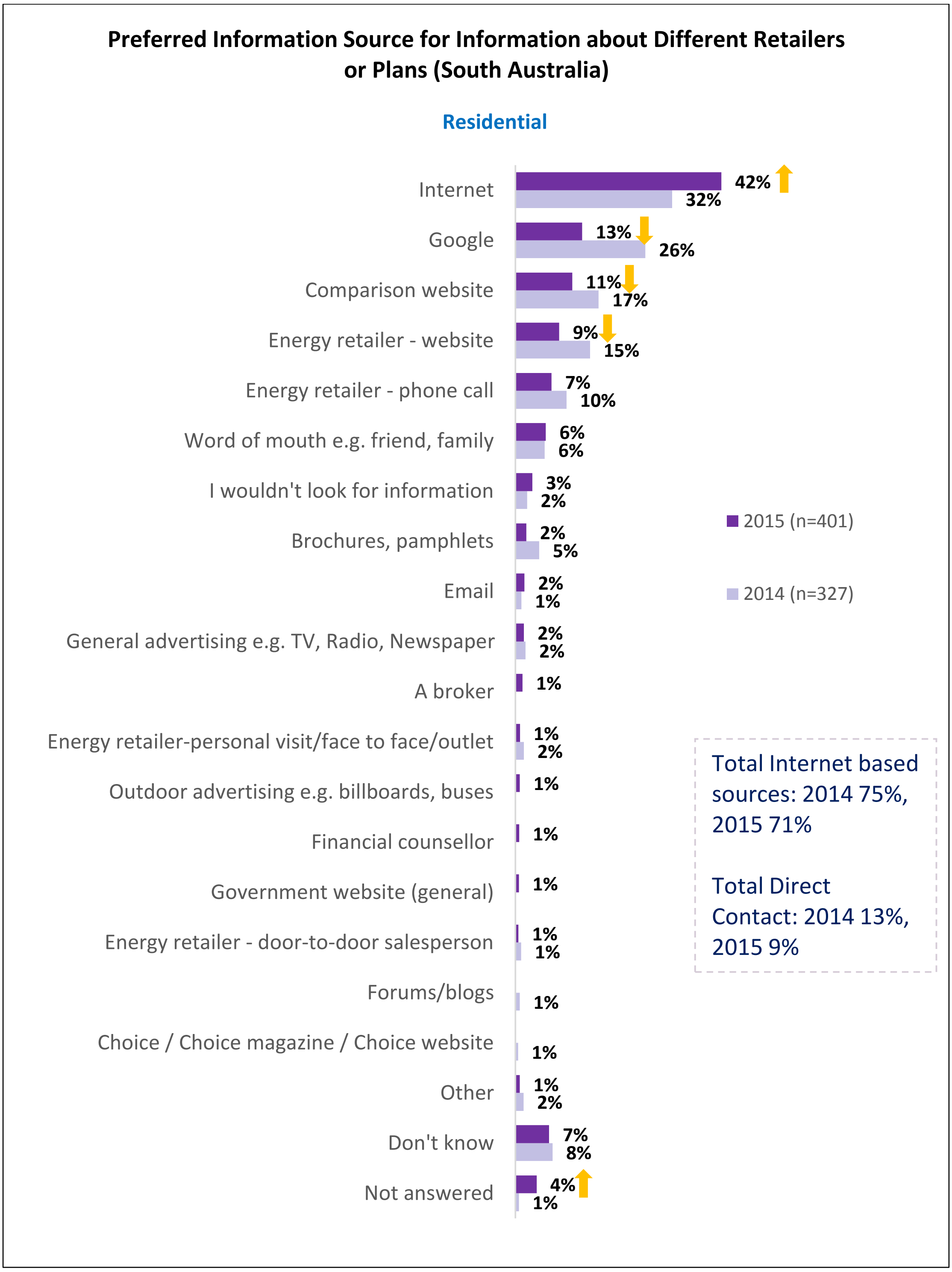
Base: Residential Respondents who had not switched company or plan in the past five years but had investigated different options in the last 12 months (n=31). NB: Business results not shown due to small sample size (n=16)
Q57. And thinking about the information sources you used when investigating different offers or options, which one was most useful in helping with your decision whether or not to switch?

Adequacy of Information

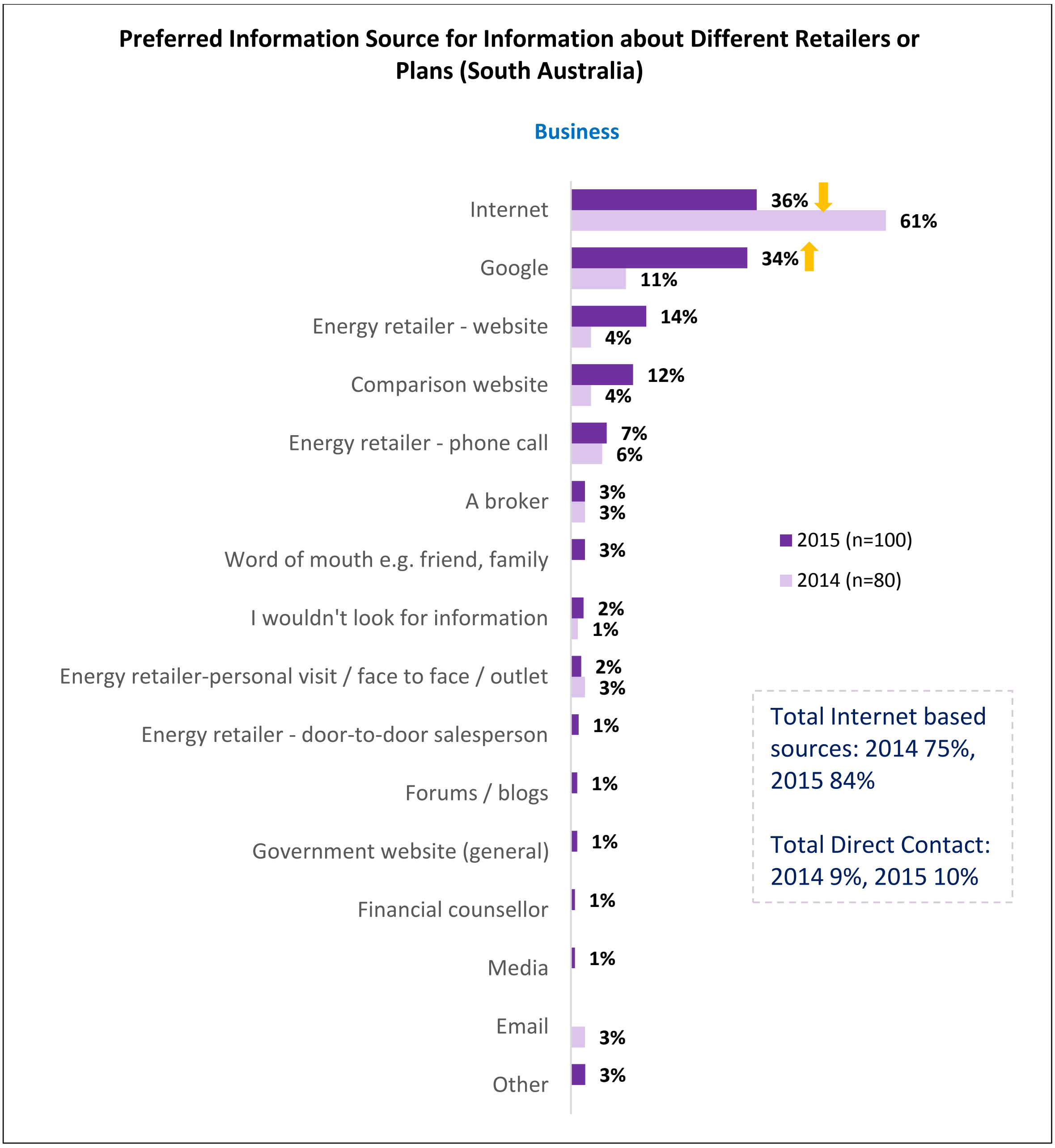


Base: All Respondents
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Preferred Information Sources



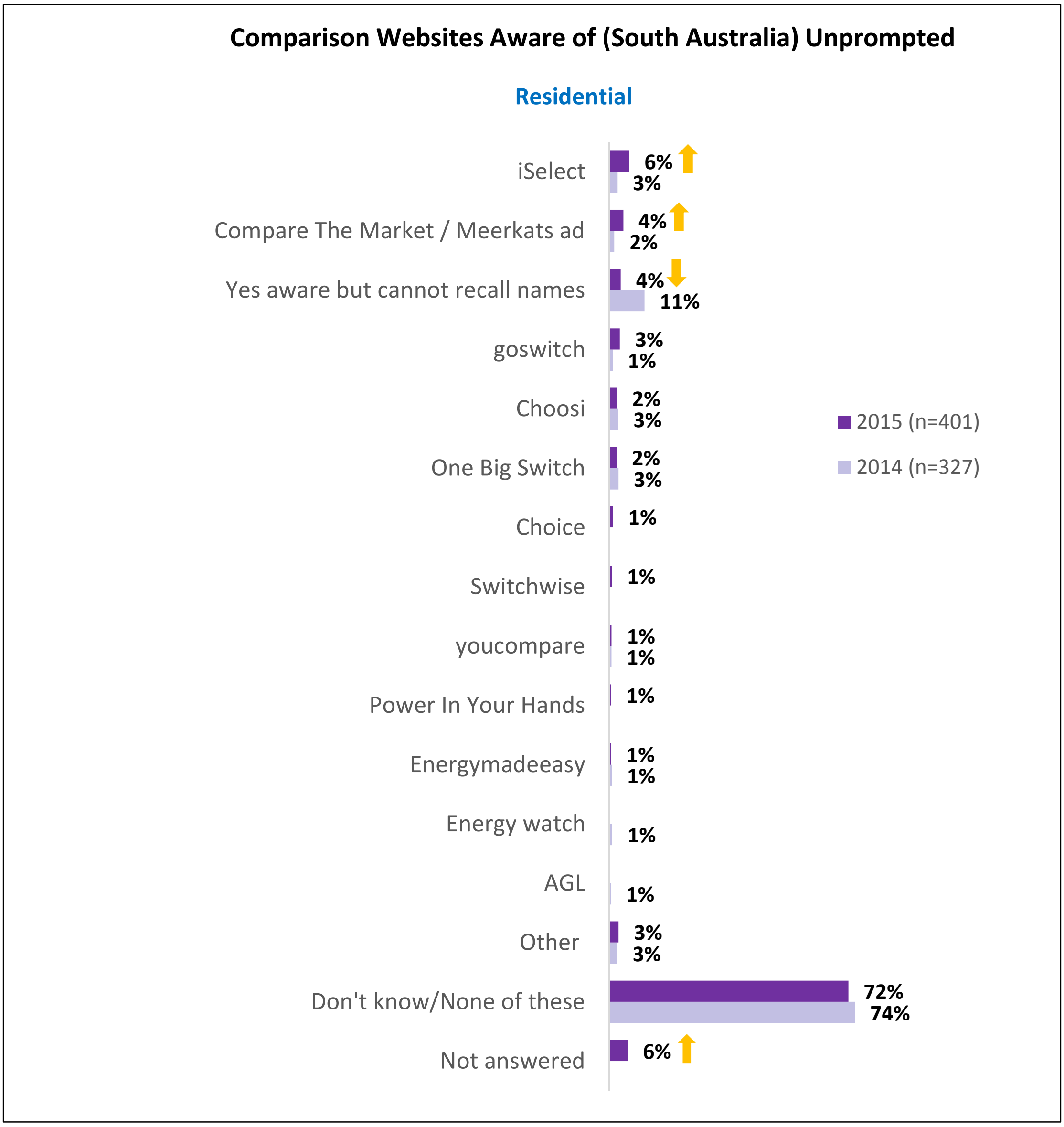
Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?



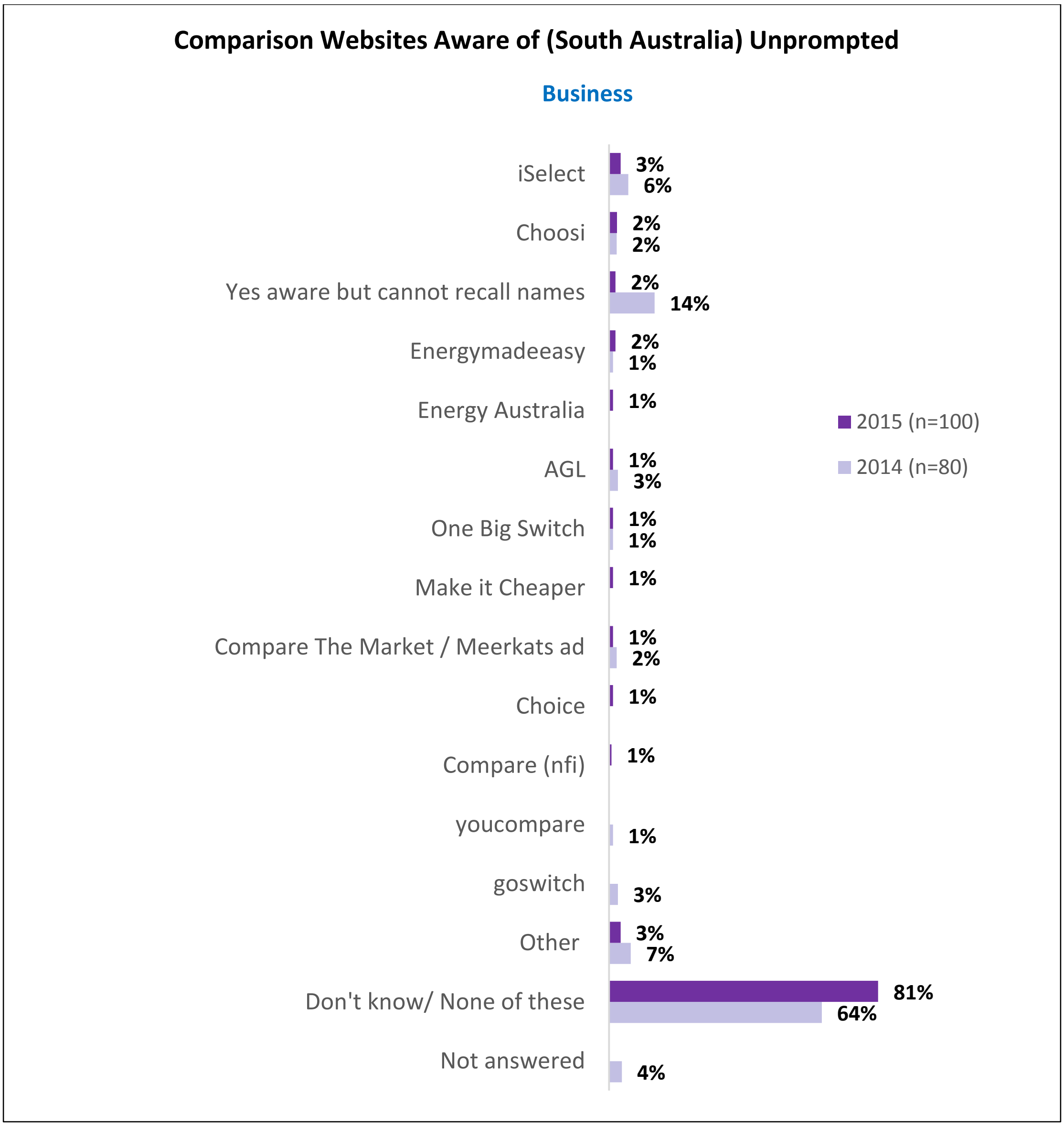
Base: All Respondents

Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

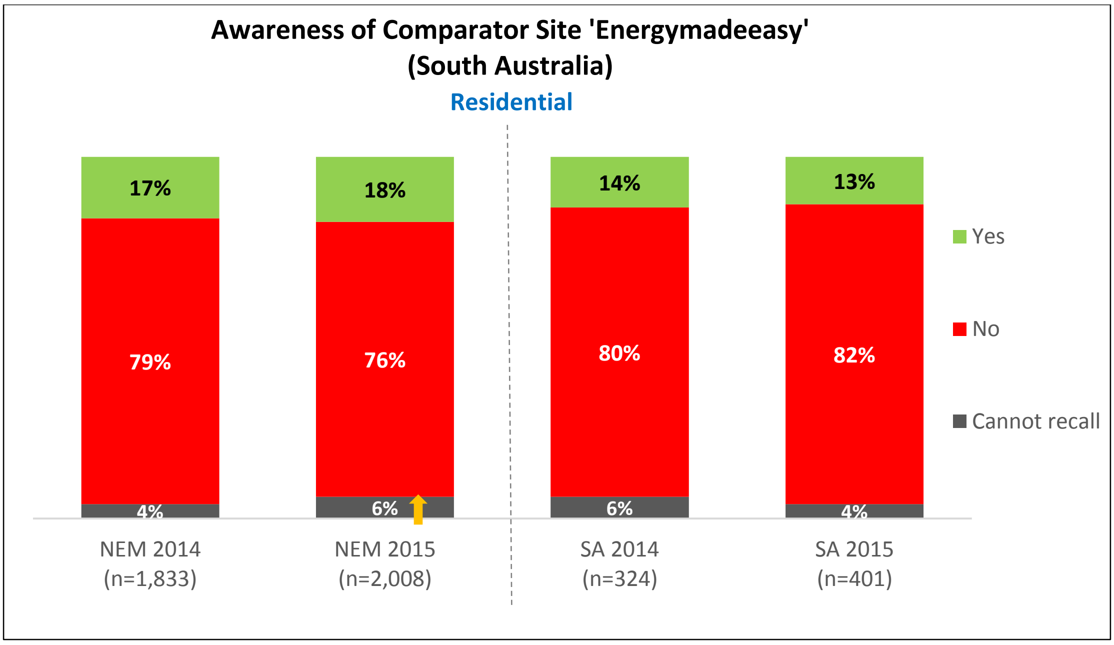
Awareness of Comparison Sites



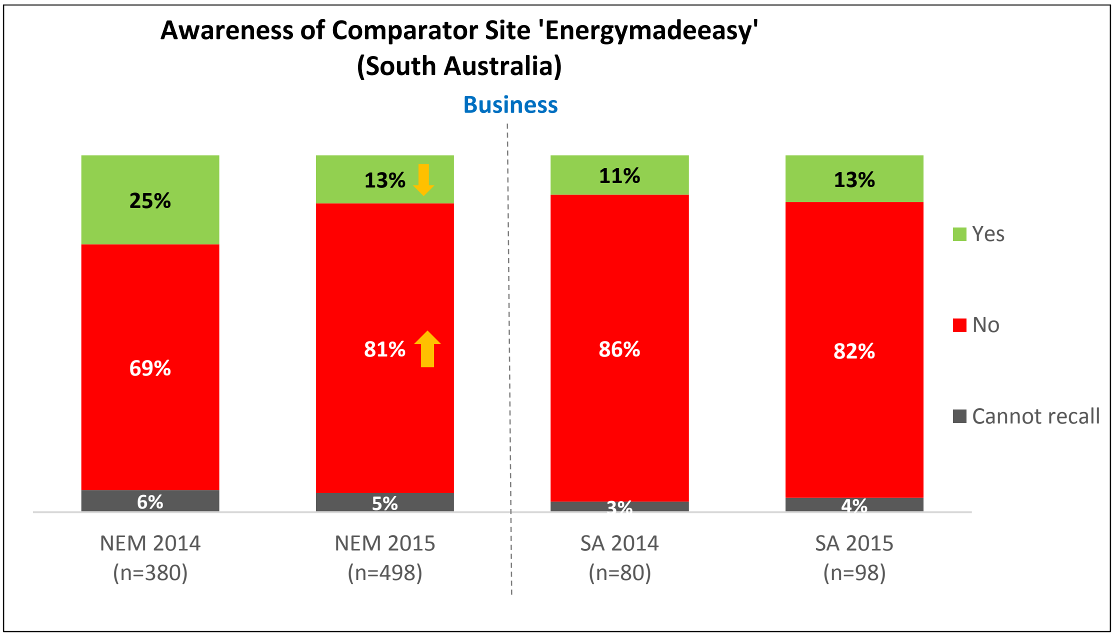
Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?

NEW SOUTH WALES

NEWGATE RESEARCH

3. New South Wales

Table of Contents

3.1 Executive Summary

Introduction

This chapter outlines Newgate Research's findings from quantitative research conducted among small energy consumers in New South Wales (NSW) in February 2015.

The research involved a mix of telephone and online surveys with n=402 residential consumers and n=101 small business consumers. For the purposes of this survey, residential consumers were defined as the person in the household who is the main or joint decision maker when it comes to choosing their energy company. Small business consumers also had to be the main decision maker and in addition, their quarterly electricity bill needed to be less than $7,250 in Sydney and less than $7,750 in regional NSW. If they had mains connected gas, the quarterly bill needed to be less than $4,000 in Sydney and less than $6,250 in regional NSW.

The sample breakdowns by methodology and for age and gender are shown in the tables below. In addition to these, the survey included a sample of n=163 residential consumers and n=21 small business consumers who had mains connected gas.

Respondent type by mode (n=)	Residential		Small Business	
	Metro	*Regional*	*Metro*	*Regional*
Online	193	109	-	-
Telephone	63	37	64	37
Total	**256**	**146**	**64**	**37**

Age/gender breakdown (residential n=)	Male	Female	Total
18-34	50	51	101
35-54	76	79	155
55+	71	75	146
Total	**197**	**205**	**402**

Further details about the methodology are provided in the Methodology section.

Throughout this chapter, statistically significant differences (95% confidence level) between the 2014 and 2015 results are noted using arrows (↑↓). Where there are differences between individual sub-groups, these are indicated using **red** (meaning significantly lower than other groups) or **blue** font (significantly higher than other groups).

Please note, throughout this chapter the results relating to gas for small business consumers are not shown due to a small sample size (n=21).

Key Findings

Awareness levels in NSW remained strong

Most consumers in NSW were aware that they can choose their energy company and plan and awareness levels remained fairly consistent with 2014. When it comes to confidence in choosing the right energy option or offer or finding the right information to choose a suitable energy deal, consumers remained fairly confident overall. Please note, however, that previous qualitative research conducted in 2013 suggests that consumer confidence levels tend to be overstated and that very few actually know much about the plan they are on or the specifics of their bill.

Switching rates in NSW have declined

Among residents, overall switching rates have declined significantly, with just 53% indicating they had switched their electricity or gas company or plan in the past five years compared with 61% in 2014. This decrease in switching is most likely due to a decline in approaches by energy companies in the past year (from 49% in 2014 to 39% in 2015).

Significantly more residents actively investigated offers in 2015

A third of residential consumers (33%) had actively investigated offers or options that they could potentially switch to. This represents a significant increase since 2014 (27%) and could be related to higher awareness of the *energymadeeasy* website as a result of the NSW Government's 'The Power's in Your Hands' campaign.

Price related factors remained the main reason for switching energy company or plan

Reasons for switching their energy company or plan remained consistent with cheaper prices and discounts most commonly mentioned. When prompted with a range of factors, the discounts offered, the estimated total bill amount and the price per unit of energy were by far the most important factors considered when deciding whether or not to switch.

A lack of value proposition remains a barrier to switching

Among those residents who had investigated offers but not switched in the past 12 months, the main reason given was a lack of value proposition (43%). Among consumers who had not investigated options or switched provider or plan, the main reasons given were they were happy with their current retailer or arrangements (29% of residents), it would be too much time and effort (19% of residents) or there was a lack of value proposition (16% of residents).

There remains a fair level of interest in seeking out a better deal

In 2015 just over one in ten consumers (12% residential, 14% small business) indicated they were currently looking for a better deal. Around four in ten (39%, 41%) were interested but not currently looking and three in ten were not interested in switching (33%, 28%). These results were fairly consistent with 2014.

Satisfaction with the level of choice in NSW increased significantly among residents

In 2015 six in ten residents (60%) were very or somewhat satisfied with the level of choice in their state, up from 47% in 2014.

Consistent with 2014, ratings of gas companies were higher than for electricity companies

When it comes to satisfaction with current electricity and gas companies, the 2015 results were very consistent with 2014 and NSW ratings were also very consistent with NEM averages. Residential consumers tended to rate their energy company higher than small business consumers.

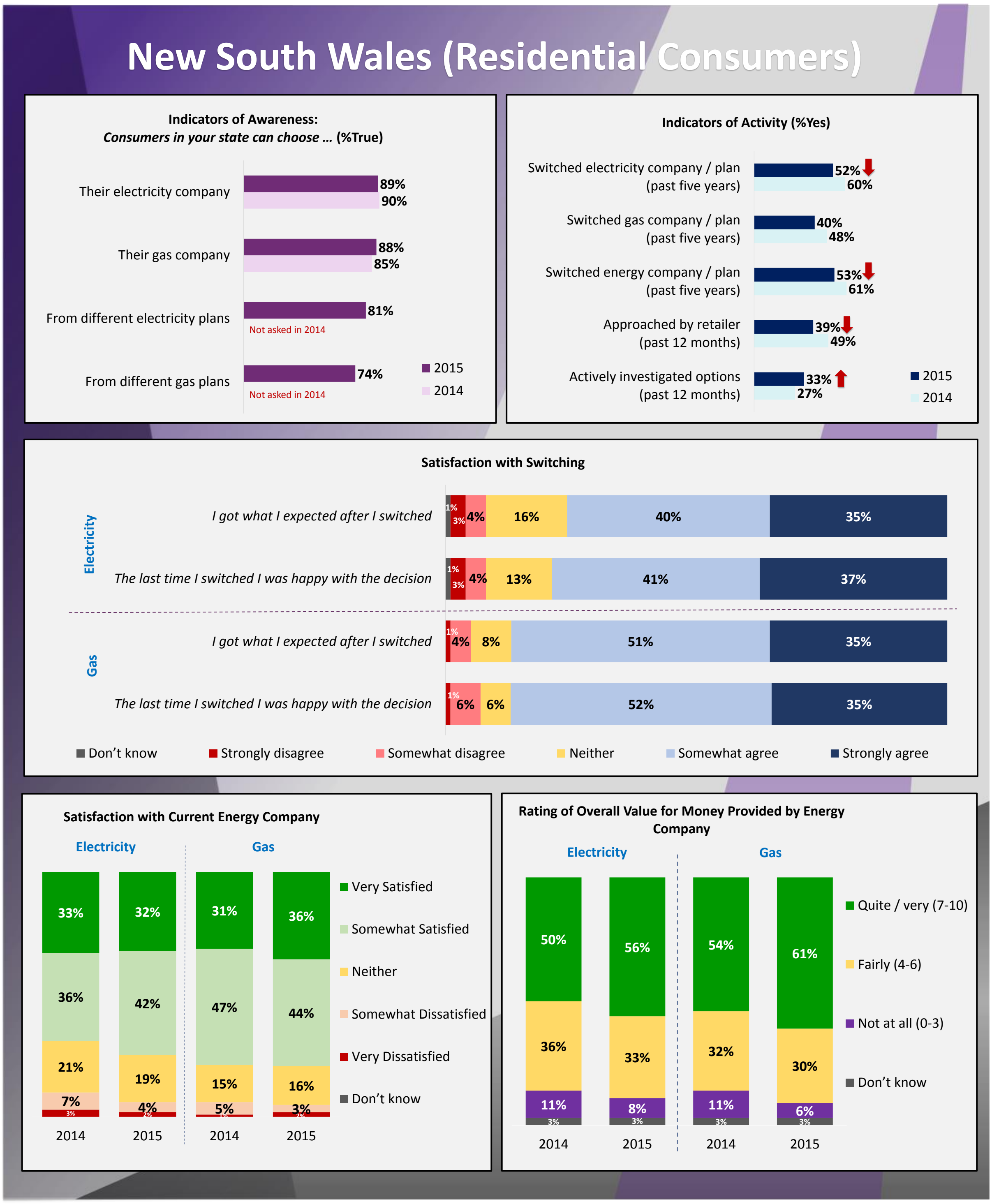
The internet remained the most popular information sources

Internet based information sources were deemed most useful among those who had switched or investigated their options. They were also the most preferred information source for looking for information about different energy retailers or plans.

While unprompted awareness of comparison websites remained low in 2015, significantly more residents had heard of energymadeeasy when prompted

At least two thirds of consumers (65% residential, 73% small business) could not name any comparisons sites at all and a further 3% were aware there were comparison sites but could not recall any specific sites. When prompted, around one in six residents (16% up from 11% in 2014) had heard of *energymadeeasy*. In 2015 there was a very significant decline in the proportion of small business consumers who had heard of *energymadeeasy* (4% down from 26% in 2014).

Snapshot of Results



3.2 Key Findings in Detail

3.2.1 Customer Awareness & Understanding

Summary of Findings

In NSW consumer awareness of being able to choose their own energy company or plan remained quite high in 2015.

Around nine in ten consumers were aware they could choose their electricity company (89% of residents, 95% of small businesses up from 86% in 2014) or gas company (88% of residents). When it came to choosing from different plans with different price structures, contract lengths and terms, eight in ten residents (81%) and nine in ten small businesses (87%) were aware they could choose from different electricity plans. Awareness of being able to choose from different gas plans was slightly lower with just 74% of residents indicating they were aware there were choices. Additional analysis shows that:

- Those who had been approached by an energy company in the past 12 months offering to sell them electricity or gas were significantly more likely to be aware that consumers could choose from a range of different electricity or gas plans.

While there are actually 20 electricity brands and six gas brands to choose from in NSW, on average, residents thought there were about six electricity brands to choose from in their state and about five gas brands. Small business consumers thought there were about five electricity brands to choose from. Although there were slight differences in the averages between 2014 and 2015, these were not statistically significant.

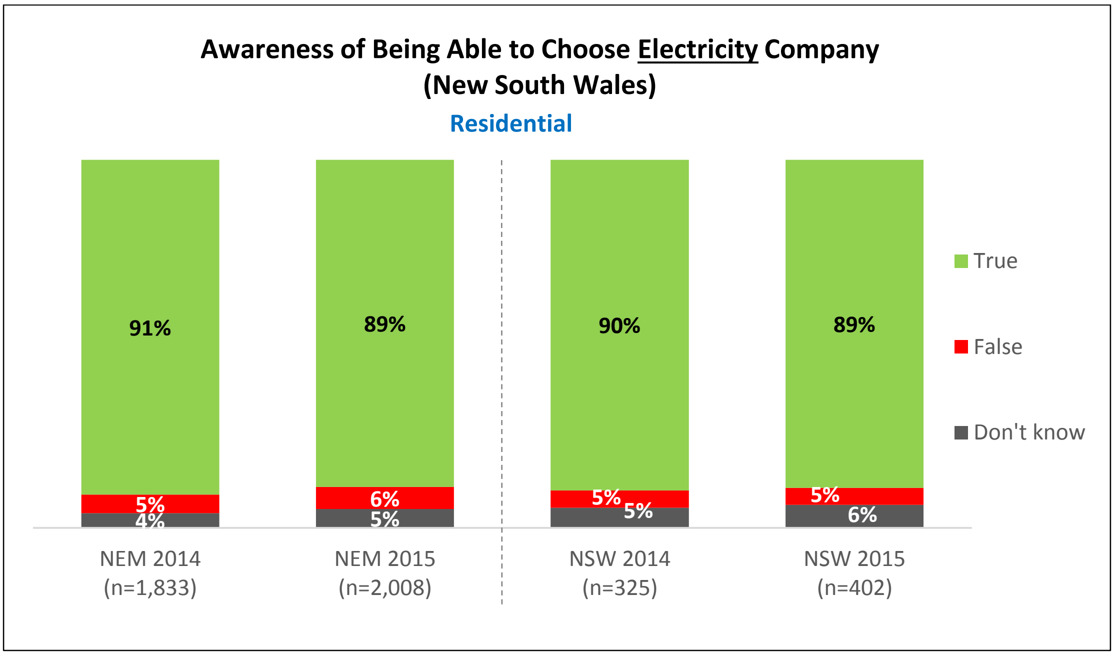
When it comes to confidence in choosing the right energy option or offer for the household or business, consumers were fairly confident. Six in ten residents (57%) and almost half of small business consumers (45%) were quite confident they could choose the right offer, rating their confidence as seven or more out of ten. Please note, however, that previous qualitative research conducted in 2014 suggests that consumer confidence levels tend to be overstated and that very few actually know much about the plan they are on or the specifics of how their bills are calculated.

Residential consumers were a bit more confident than small business consumers. Further, the following groups of residential consumers had significantly higher confidence levels:

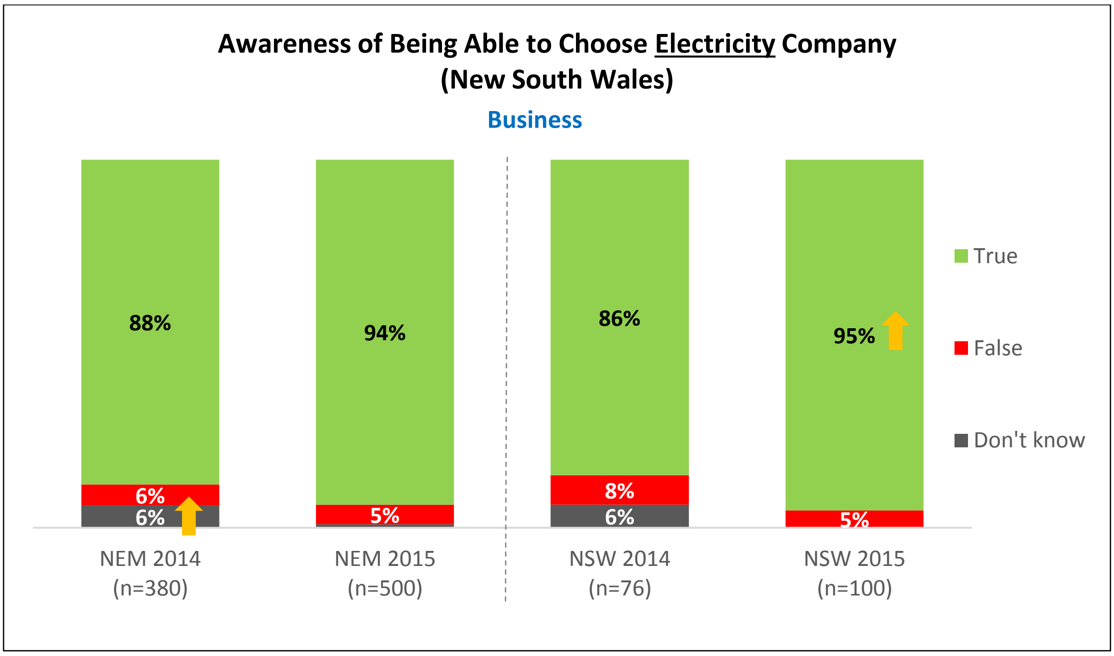
- Those aged under 35;
- Those with mains connected gas;
- Those on special payment arrangements as a result of financial hardship;
- Those who had been approached by an energy company in the past 12 months; and
- Those who had actively investigated offers in the past 12 months.

Awareness and confidence levels in NSW were fairly comparable with the NEM averages. Comparisons have not been made with previous results due to a major change in the question wording in the 2015 survey.

The Results



Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



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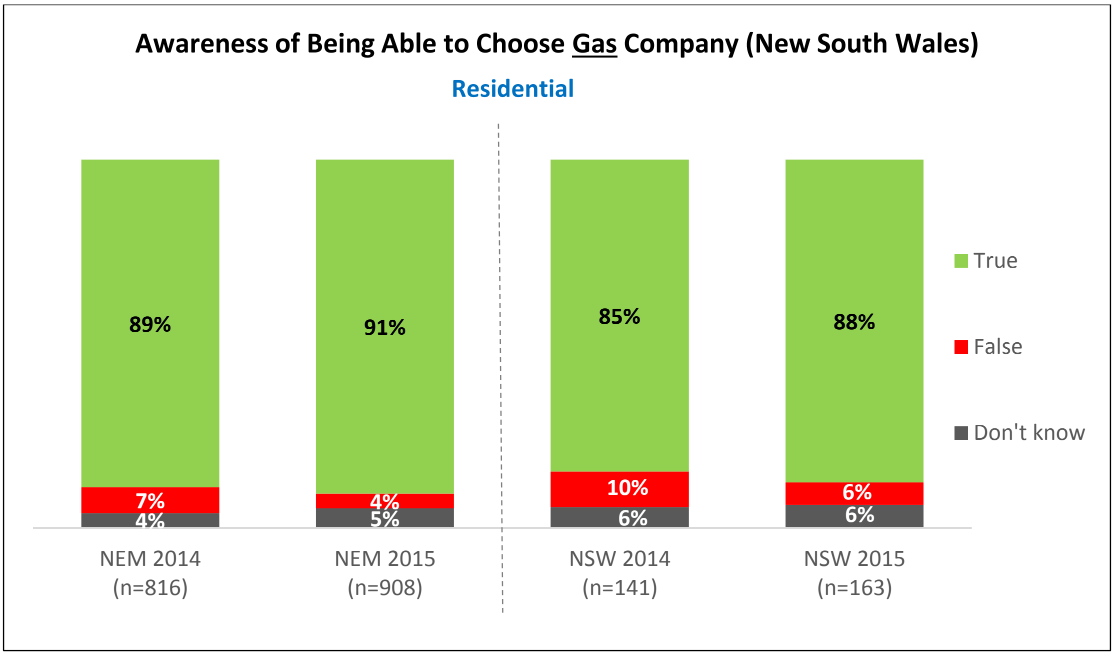
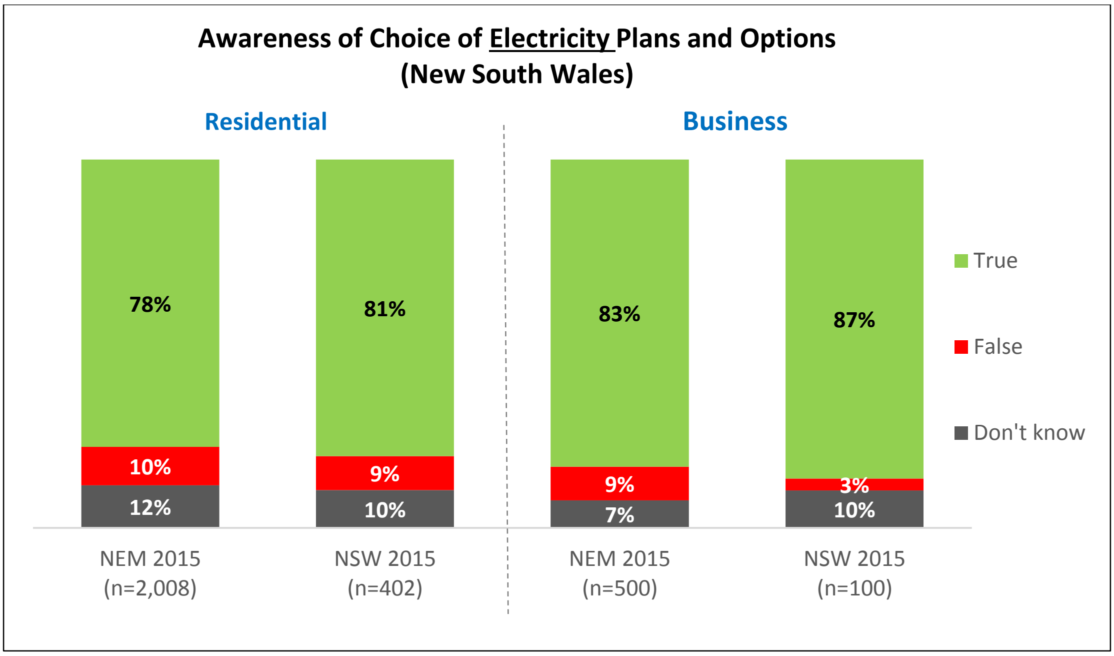
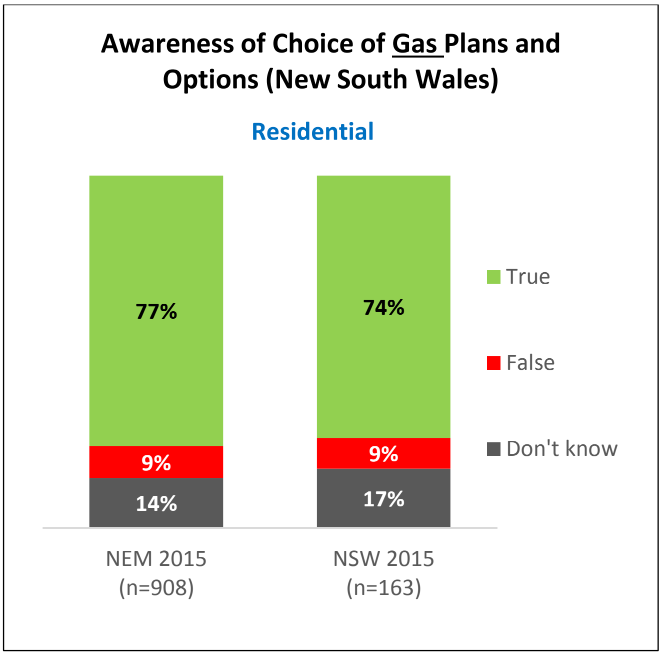


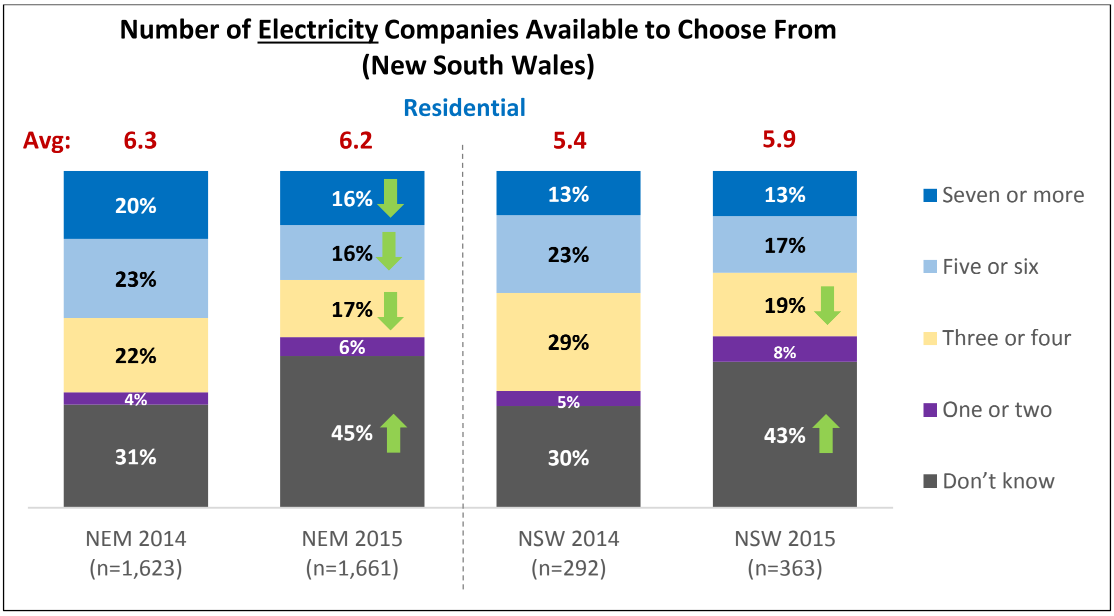
Base: Respondents with mains connected gas. NB: Small business consumer results not shown due to small sample size (n=21)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company



Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



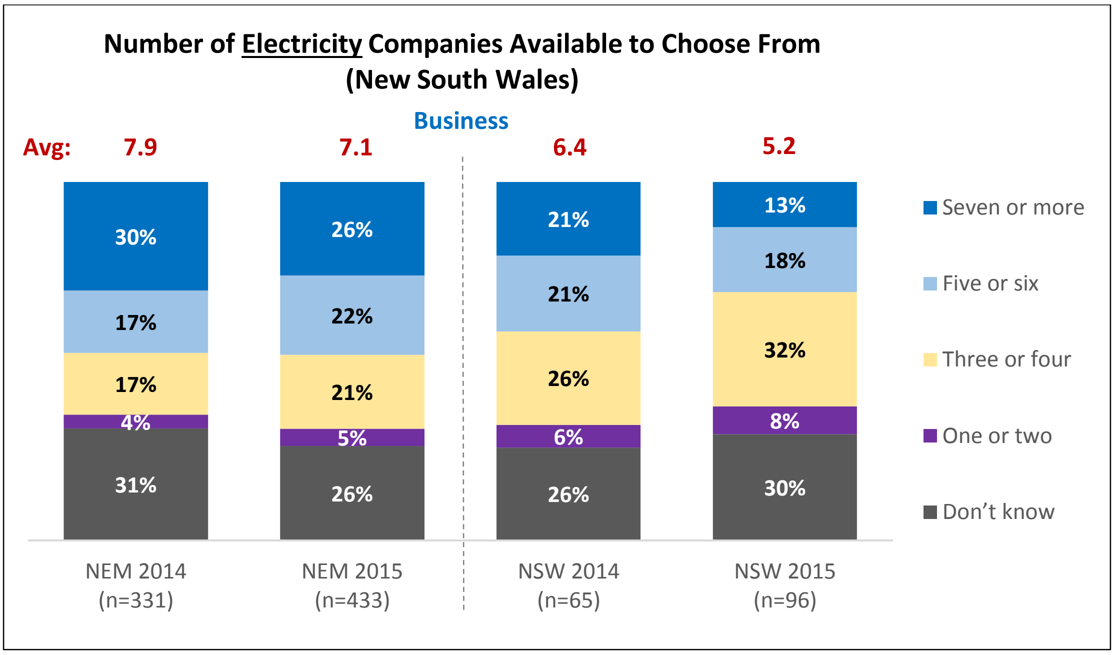
Base: Respondents with mains connected gas. NB: Small business consumer results not shown due to small sample size (n=21)
Q13. Please tell me whether you think the following statements are True or False. d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms.
NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



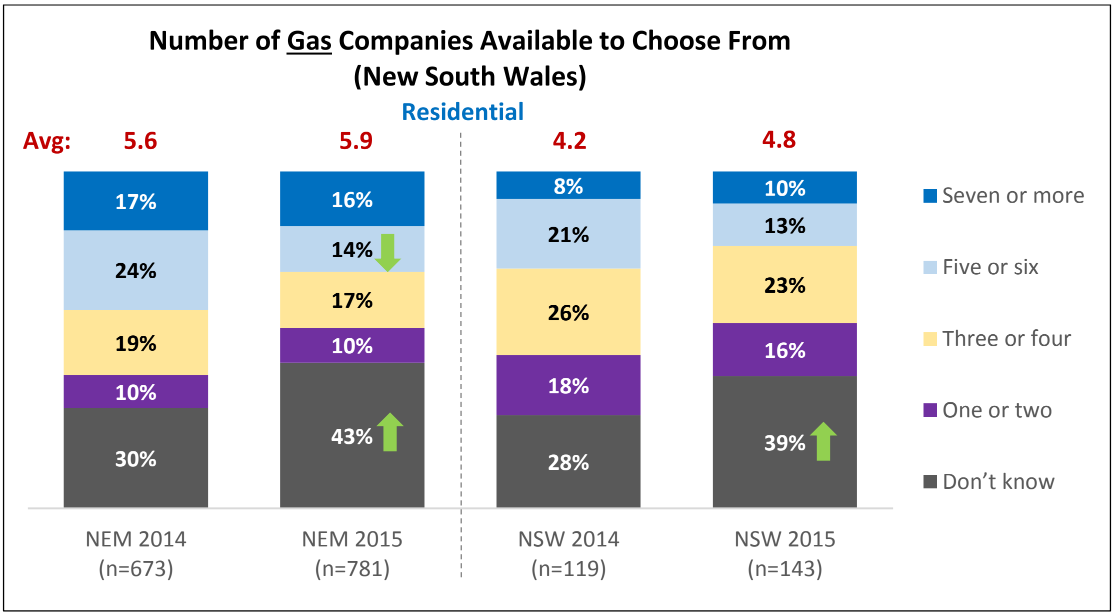
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?

Note that in 2015 there was an increase in the proportion of residential consumers who said they 'don't know' how many companies there are to choose from in their state. This increase is likely to be a result of an increase in the number of surveys completed online. Analysis of the results by survey mode shows that the online survey results in 2015 were very consistent with 2014 and similarly the telephone survey results have remained consistent.

The increase in the proportion of 'don't know' responses does not affect the averages presented in the charts since they are excluded from the calculation of the average. As such, the 2015 averages are directly comparable with the 2014 results.



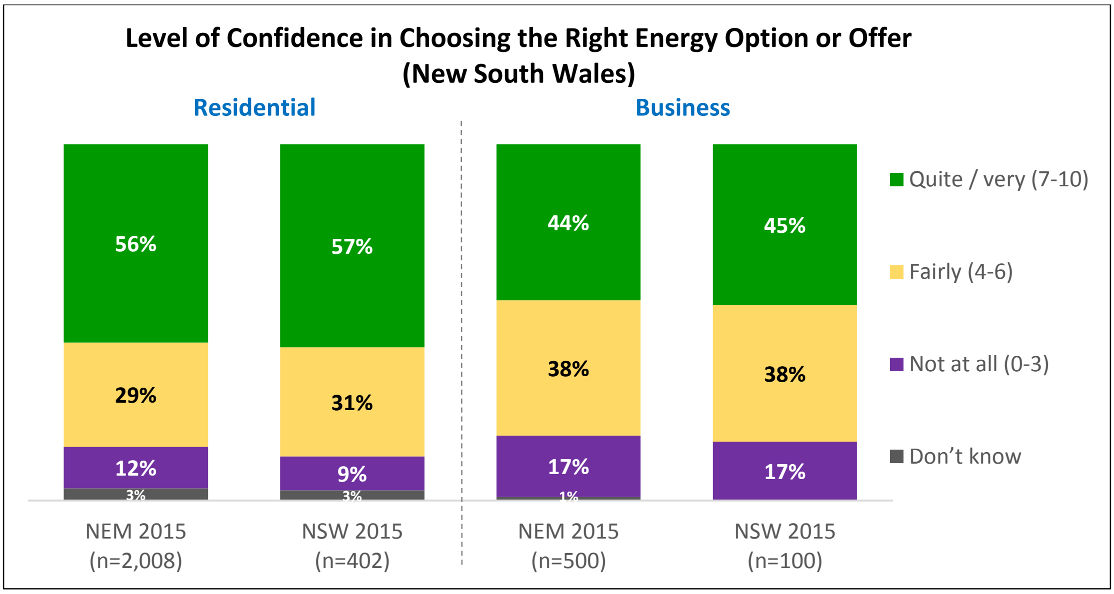
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: Respondents who say they can choose their gas company. NB: Small business consumer results not shown due to small sample size (n=20)
Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory?

Note that in 2015 there was an increase in the proportion of residential consumers who said they 'don't know' how many companies there are to choose from in their state. This increase is likely to be a result of an increase in the number of surveys completed online. Analysis of the results by survey mode shows that the online survey results in 2015 were very consistent with 2014 and similarly the telephone survey results have remained consistent.

The increase in the proportion of 'don't know' responses does not affect the averages presented in the charts since they are excluded from the calculation of the average. As such, the 2015 averages are directly comparable with the 2014 results.



Base: All Respondents
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

3.2.2 Market Participation

Summary of Findings

Incidence of Switching or Investigating Offers

Consistent with the 2014 survey, consumers were asked if how many times they had switched their electricity or gas company or plan in the past five years. To allow more granular tracking in future, those who had switched at least once in the past five years were also asked how many times they switched in the past 12 months.

In NSW around a quarter of consumers had changed their electricity company or plan (23% of residents, 26% of small business consumers) or their gas company or plan (23% of residents).

Around half of the consumers surveyed had switched their electricity company or plan in the past five years (52% of residents, 54% of small businesses) and four in ten had switched their gas company or plan in the past five years (40% of residents). This represents a significant decline in those who had switched electricity or gas company or plan in the past five years (61% of residents in 2014 compared to 53% in 2015).

- This decrease in switching is most likely due to fewer direct approaches by energy companies. In 2015 around four in ten residents (39%) had been approached by an energy company offering to sell them electricity or gas in the past 12 months compared to 49% in 2014. Further, the proportion who indicated they switched their electricity or gas company or plan because they were offered a discount or better price also decreased this year (from 39% to 28% for electricity and from 34% to 14% for gas).

The following types of residential consumers were significantly more likely to have switched electricity or gas company or plan in the past five years:

- Those who had mains connected gas;
- Those aged 35 or over;
- Those currently receiving a concession on their energy bill;
- Those with solar panels;
- Those who had been approached by an energy company;
- Those who had actively investigated offers; and
- Those with a higher gas bill ($300 or more in the previous quarter).

By contrast, the following types of residential consumers were more likely not to have switched in the past five years:

- Those aged under 35;
- Those not currently receiving a concession on their energy bill;
- Those without solar panels
- Those who had not been approached by an energy company; and
- Those who had not actively investigated offers.

A third of consumers (33% of residents, 32% of small businesses) had actively investigated offers or options that they could potentially switch to in the past 12 months. This represents a significant increase for residential consumers in 2015 (up from 27% in 2014).

The incidence of switching, being approached by an energy company and actively investigating offers in NSW was fairly consistent with the NEM average.

Motivations for Switching

In 2015 price related factors remained the main reason for switching energy company or plan. When prompted with a range of factors that could be considered during the switching process, the discounts offered, the estimated total bill amount and the price per unit of energy were by far the most important factors when deciding whether or not to switch. The availability of green energy plans was ranked as a lower level priority. For consumers with solar panels, the solar feed-in tariff was a higher level priority (37% rated the importance of this as 10 out of 10, 37% rated 8 or 9 out of 10).

Satisfaction with Switching

Consumers who had switched their energy company or plan generally agreed that they were happy with their decision to switch and they got what they expected after they switched. Those who were happy with their decision to switch were most likely to feel that way as a result of the savings, discounts or incentives they received. Despite this, only around half of those who switched agreed that they would recommend switching to their family, friends or colleagues. Consumers who agreed they got what they expected when they switched their electricity company or plan (71%) and who were happy with the decision (70%) were significantly more likely to advocate switching compared to those who were not as happy with the outcomes (20% and 19% respectively). There were no differences in these attitudes by the information sources used when they switched.

When it came to the ease of comparing offers when deciding whether or not to switch, around six in ten found it fairly or very easy to compare electricity offers (58% of residents, 62% of small business consumers) and seven in ten found it fairly or very easy to compare gas offers (71% of residents).

Consumers who had switched other service providers were asked how easy or difficult it was to compare offers for that service in order to compare electricity and gas. Residents found comparing gas offers comparable with services such as the internet or health insurance. However, when it came to comparing electricity offers, consumers did not find this as easy as comparing offers for other service – in fact is was ranked lowest in terms of ease. There were no differences in ease of switching by the information sources used when they switched.

Barriers to Investigating Offers or Switching

Among those who had investigated offers but not switched in the past 12 months, the main reason given among residents was a lack of value proposition (43%). Lower level reasons were they found it too confusing (11%), it would be too much time and effort (8%) or they were on a contract (7%).

Among consumers who had not investigated options or switched provider or plan, the main reasons given were they were happy with their current retailer or arrangements (29% residential, 30% small business), it would be too much time and effort (19% residential, 45% small business) or there was a lack of value proposition (16% residential, 10% small business).

These barriers were fairly consistent with those mentioned in 2014.

Switching Intentions and Attitudes

In 2015 just over one in ten consumers (12% residential, 14% small business) indicated they were currently looking for a better deal. Around four in ten (39%, 41%) were interested but not currently looking and three in ten were not interested in switching (33%, 28%). These results were fairly consistent with 2014, however the addition of the new code 'recently switched so won't look again for a while' resulted in some slight decreases in other response options. The following types of residential consumers were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal:

- Those with mains connected gas;
- Those under the age of 55;
- Those on a special payment arrangement as a result of financial hardship;
- Those currently experiencing financial difficulty paying their electricity or gas bill;
- Those with a higher household income; and
- Those with higher energy bills.

In order to seriously consider switching their company or plan, residents wanted to save an average of $194 per year on their electricity bill and $151 on their gas bill. Small business consumers wanted to save about $695 on their electricity bill in order to consider switching. Those with higher energy bills wanted to see a bigger saving before they considered switching. There was no difference in the amount needed to save among those who agreed or disagreed that the amount they could potentially save was not worth the effort.

When it came to attitudes towards investigating offers or switching, consumers were most likely to agree they would switch if they were not satisfied with their current company (82% residential, 82% small business) and that they were concerned that if they switched there would be hidden fees and charges (68% residential, 67% small business). Consumers were least likely to agree that the amount of money they could potentially save was not worth the time and effort (40% residential, 42% small business) or they can't be bothered looking for a better deal (39% residential, 34% small business). The following differences were evident among residential consumers:

- Those who had switched in the past five years were significantly less likely to agree that the amount they could potentially save is not worth the time and effort involved;
- Vulnerable customers i.e. those who were either receiving a concession, were on a special payment arrangement or were currently experiencing financial difficulty paying their energy bill, were more likely to be concerned about hidden fees and charges and to be mistrusting of energy companies who promise a better deal. Consumers in this group were also more likely to find it too complicated to compare offers or to say they cannot be bothered looking for a better deal.

The Results

Incidence of Switching or Investigating Offers

In the Last Five Years

Provider (% switched at least once)	Residential			
	NEM		NSW	
	2014 (n=1,833)	2015 (n=2,008)	2014 (n=325)	2015 (n=402)
Electricity Company	48%	39% ↓	49%	40% ↓
Electricity Plan	39%	31% ↓	40%	34%
TOTAL Electricity	**60%**	**50% ↓**	**60%**	**52% ↓**
Gas Company	40%	35% ↓	37%	36%
Gas Plan	30%	24% ↓	33%	27%
TOTAL Gas	**49%**	**40% ↓**	**48%**	**40%**
TOTAL Electricity or Gas	**61%**	**51% ↓**	**61%**	**53% ↓**
Car Insurance	37%	35%	38%	36%
Mobile	32%	31%	32%	31%
Internet	30%	29%	30%	29%
Home Insurance	22%	26% ↑	20%	26%
Home Phone	22%	20%	22%	21%
Banking	18%	19%	18%	20%
Health Insurance	13%	16%	12%	17%

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

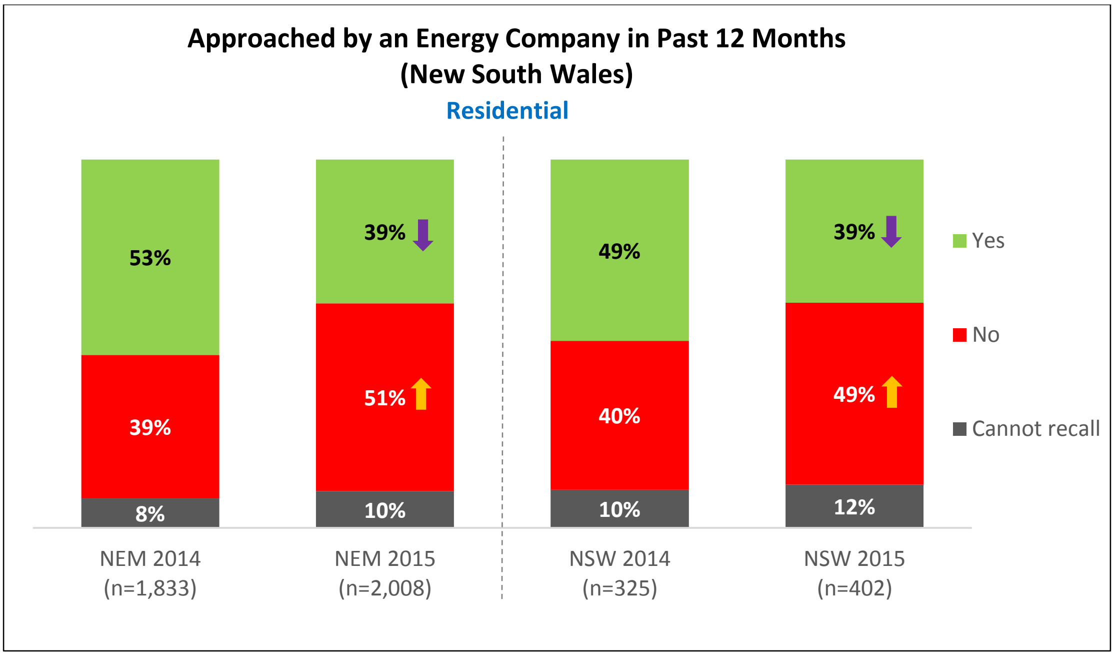
Provider (% switched at least once)	Business			
	NEM		NSW	
	2014 (n=380)	2015 (n=500)	2014 (n=76)	2015 (n=100)
Electricity Company	47%	44%	45%	43%
Electricity Plan	39%	33%	37%	35%
TOTAL Electricity	**56%**	**55%**	**55%**	**54%**
Gas Company	46%	19%	Not shown due to small sample size (n=21)	
Gas Plan	50%	16%		
TOTAL Gas	**56%**	**23%**		
TOTAL Electricity or Gas	**57%**	**56%**		

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?

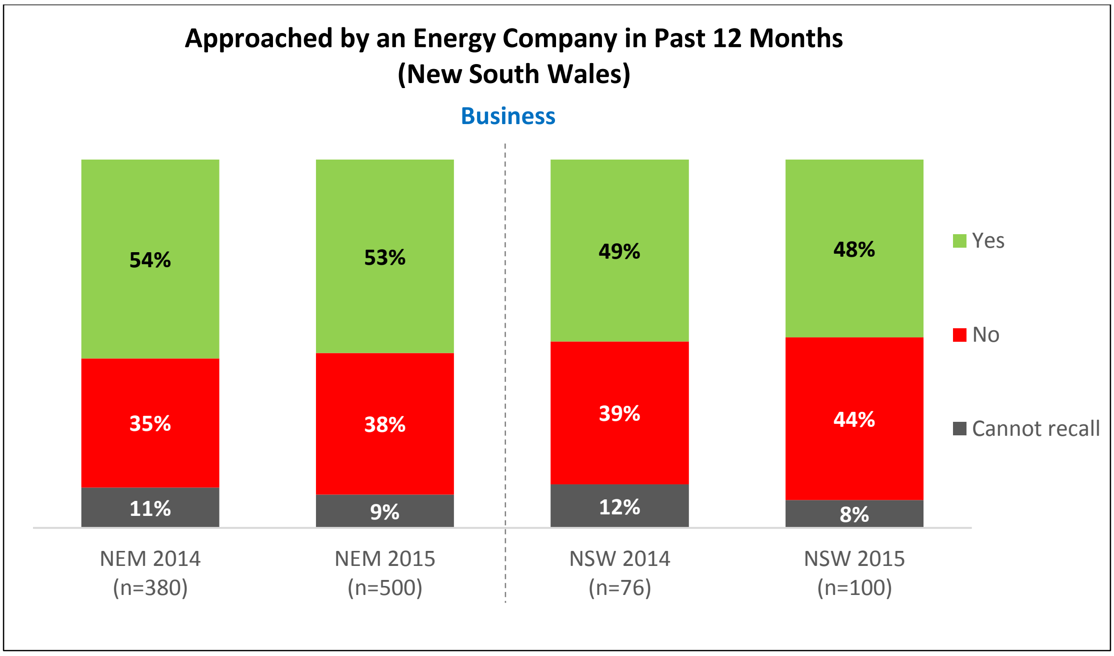
In the last 12 months

Provider (% switched at least once)	Residential		Business	
	NEM (n=2,008)	NSW (n=402)	NEM (n=500)	NSW (n=100)
Electricity Company	14%	14%	18%	17%
Electricity Plan	16%	18%	17%	20%
TOTAL Electricity	**22%**	**23%**	**28%**	**26%**
Gas Company	17%	19%	Not shown due to small sample size (n=21)	
Gas Plan	14%	17%		
TOTAL Gas	**21%**	**23%**		
TOTAL Electricity or Gas	**23%**	**24%**		

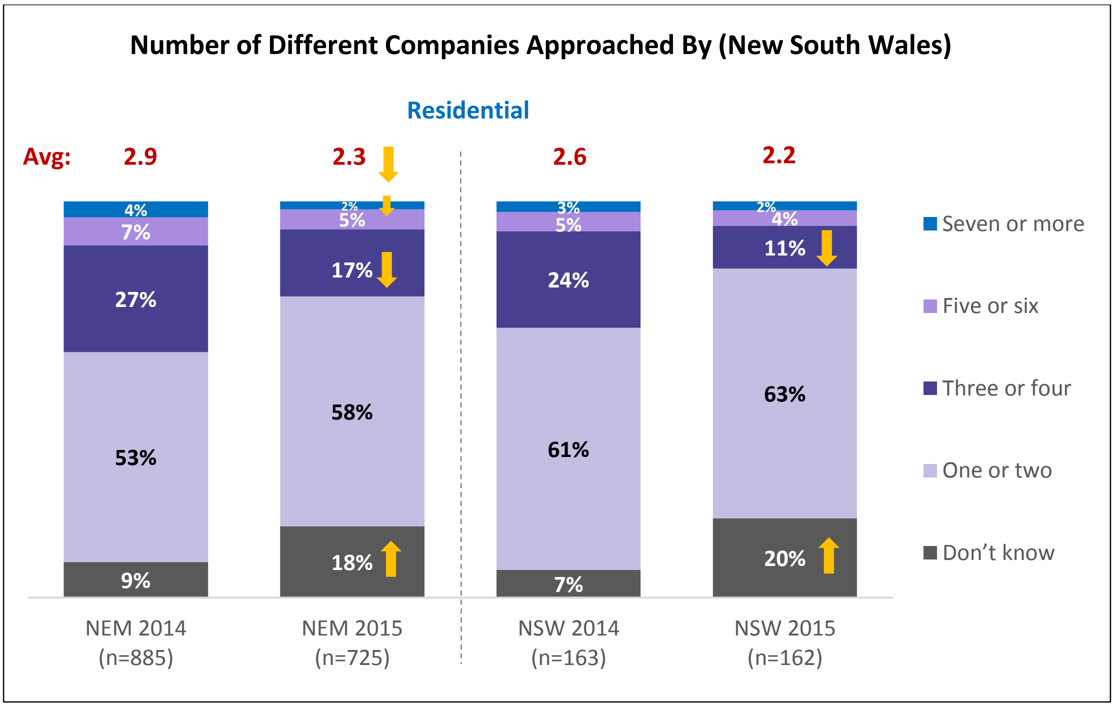
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?



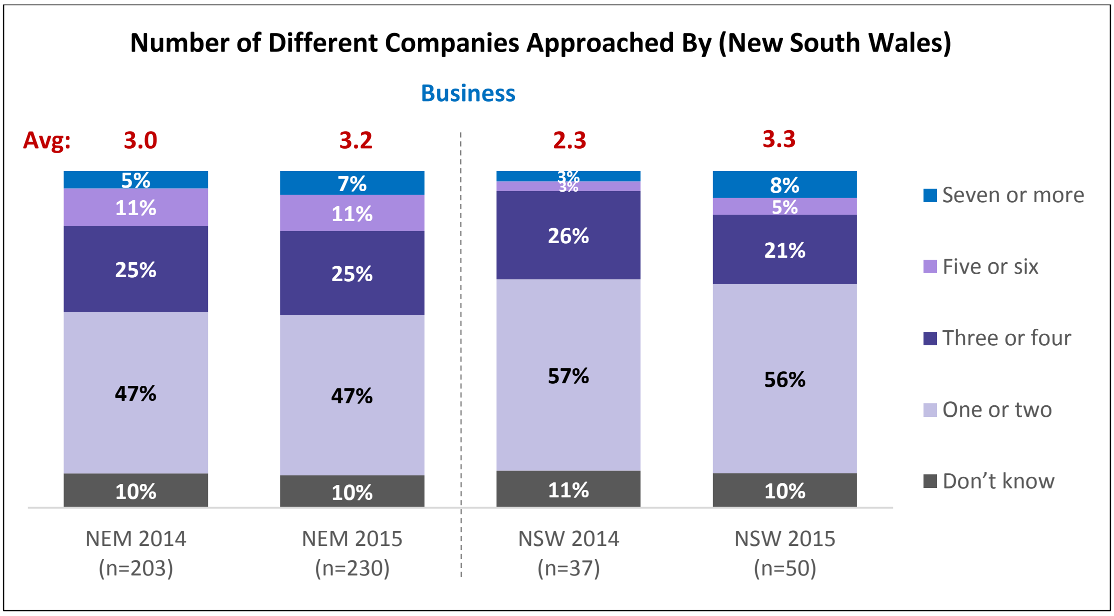
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



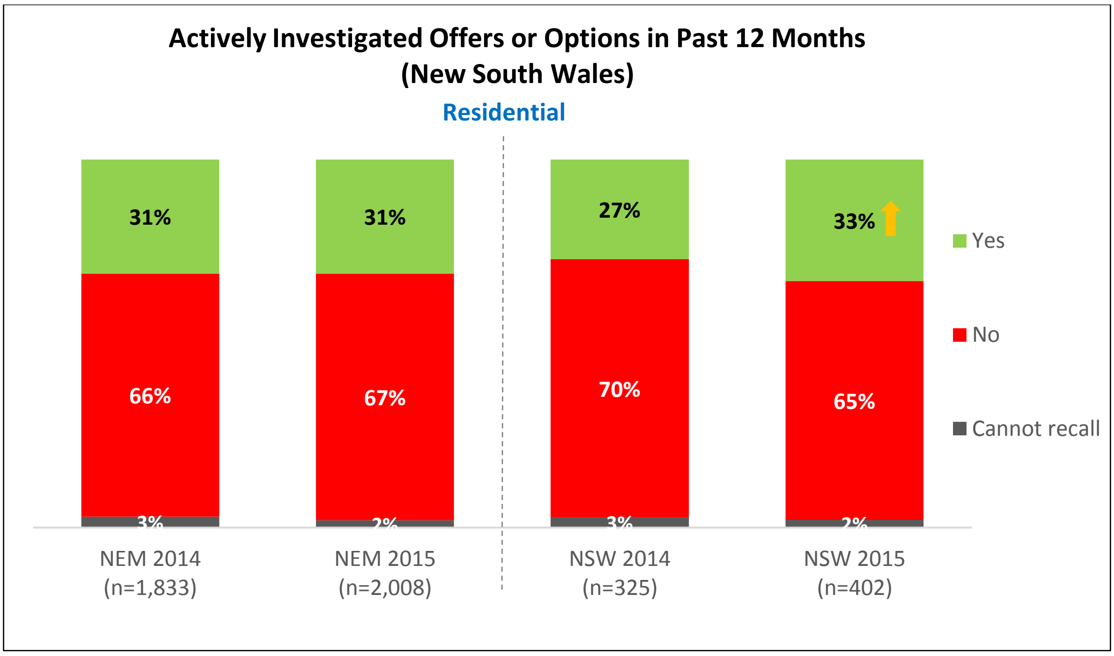
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



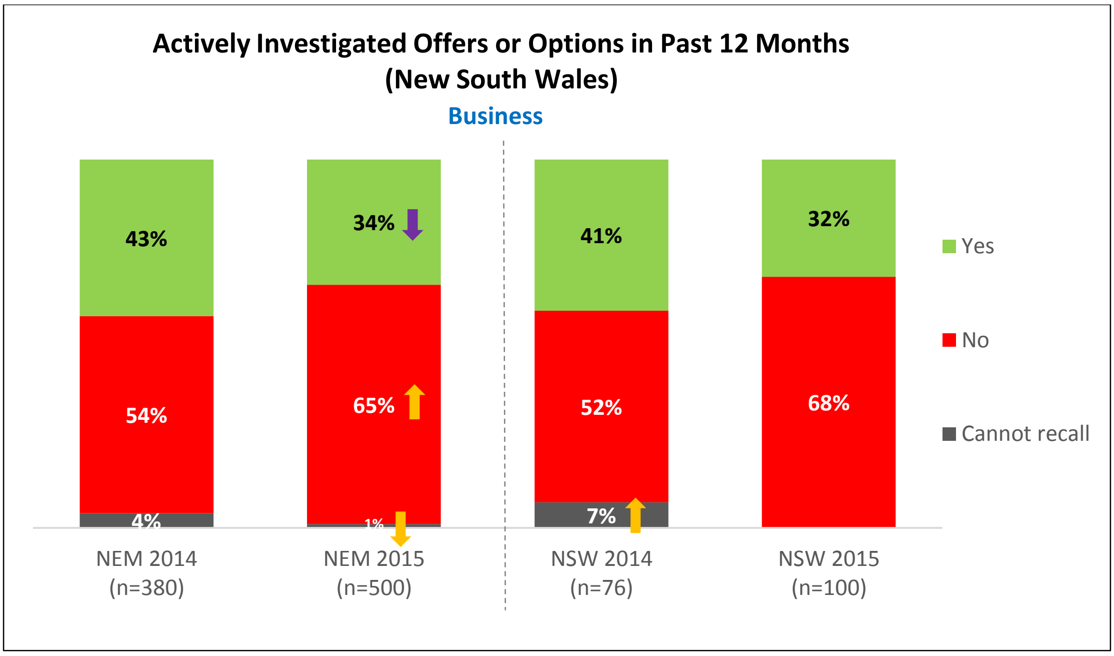
Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?



Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?

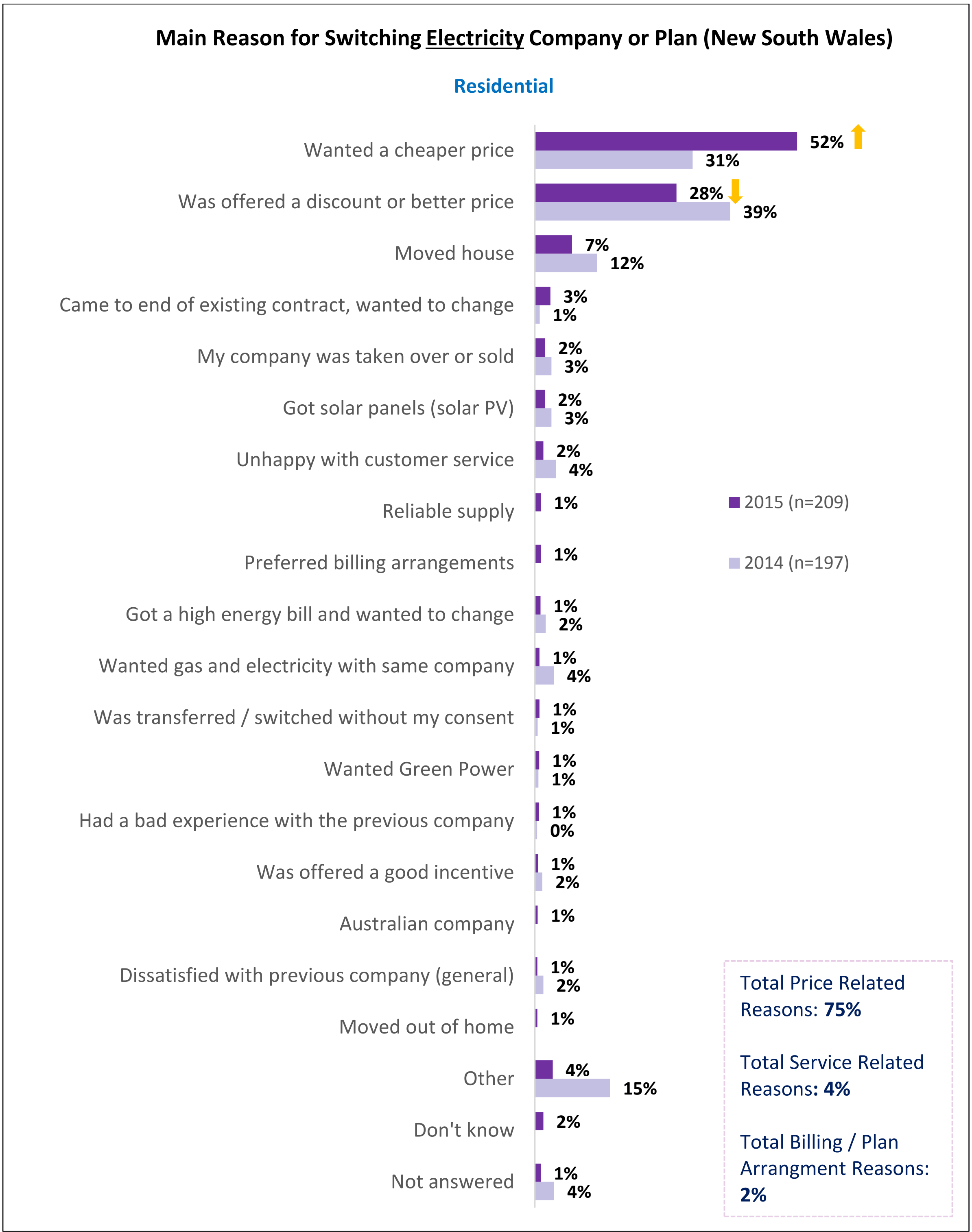


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

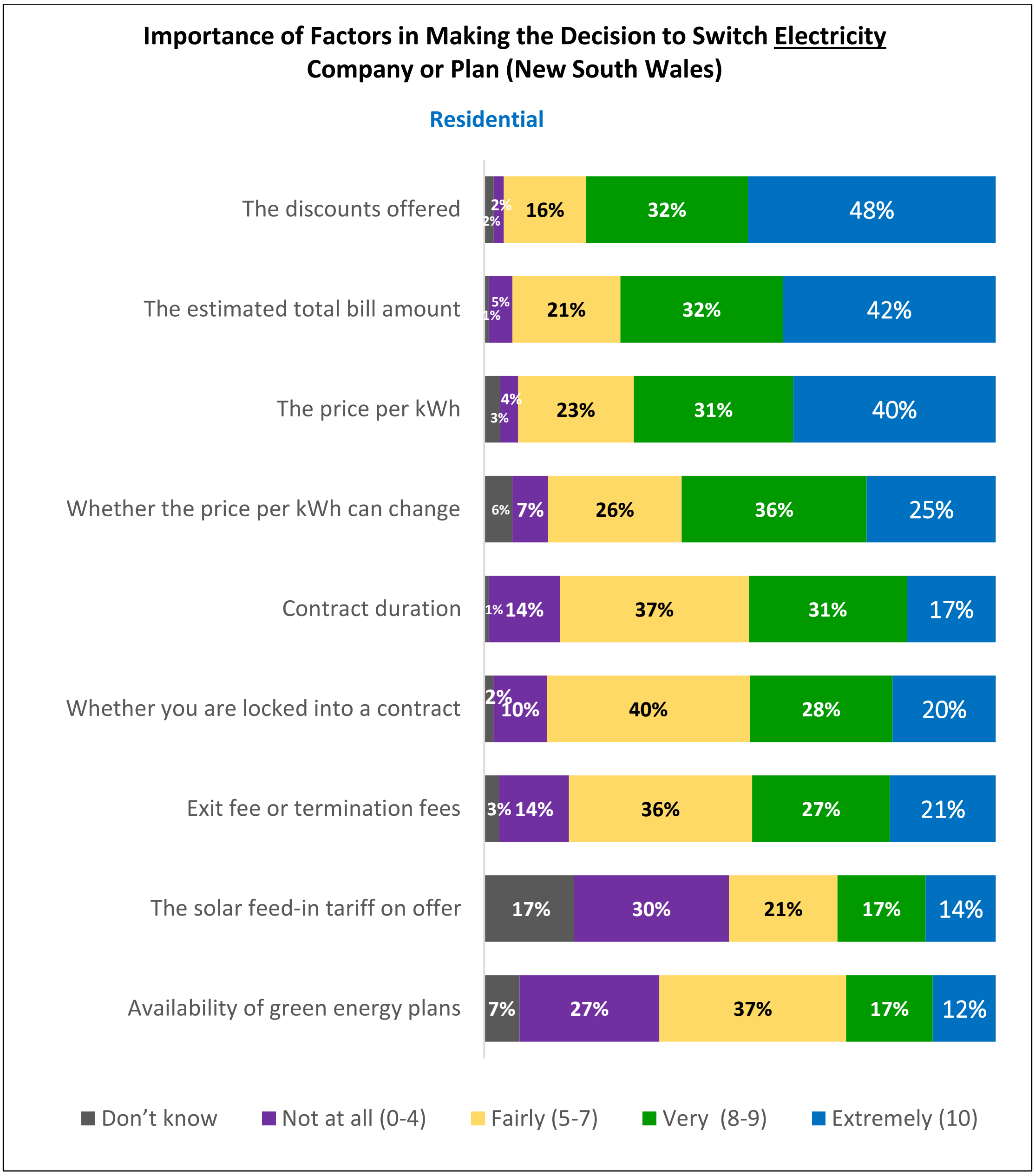


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

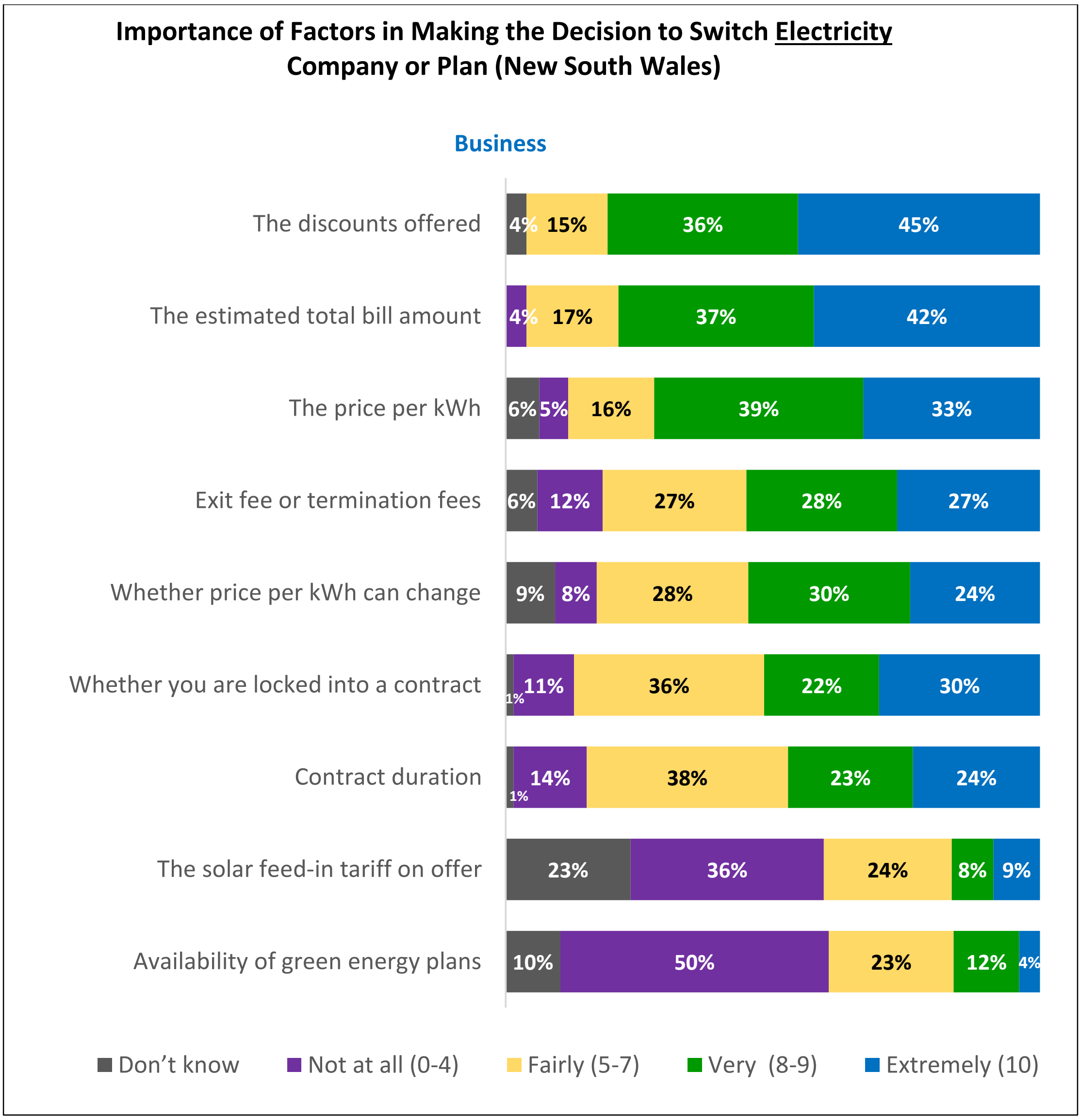
Motivations for Switching



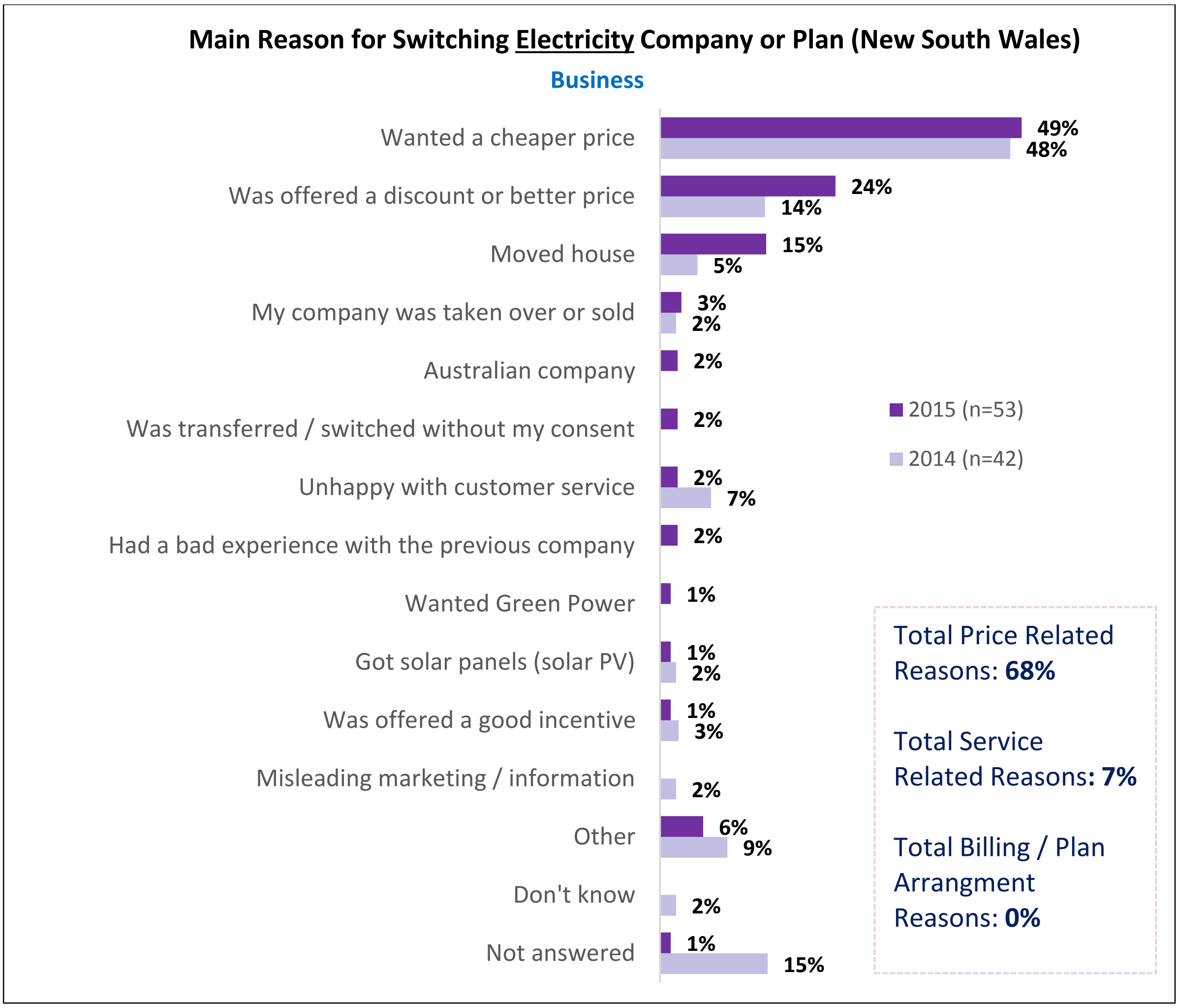
Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



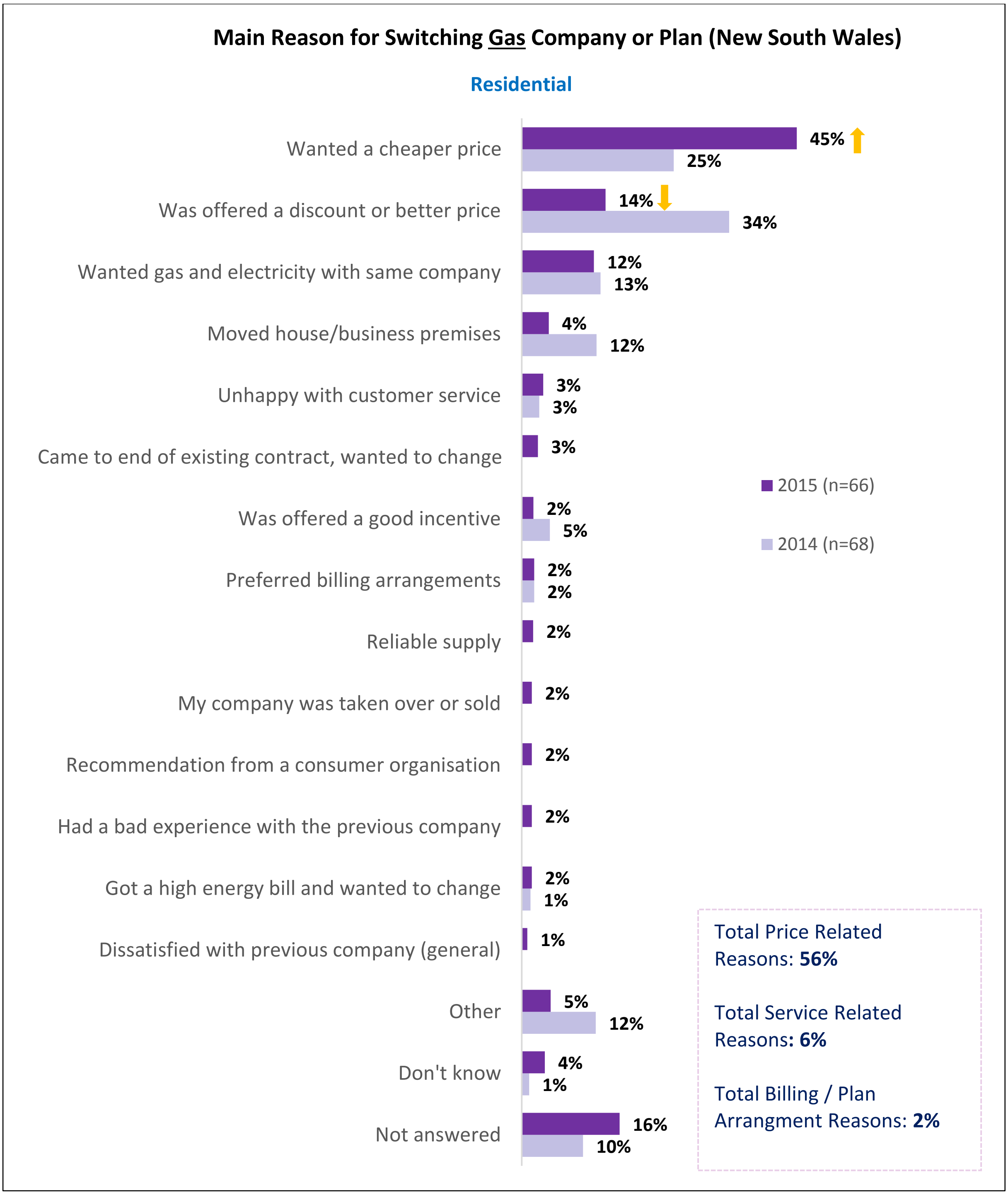
Base: Respondents who switched their electricity company or plan (Residential n=209)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?



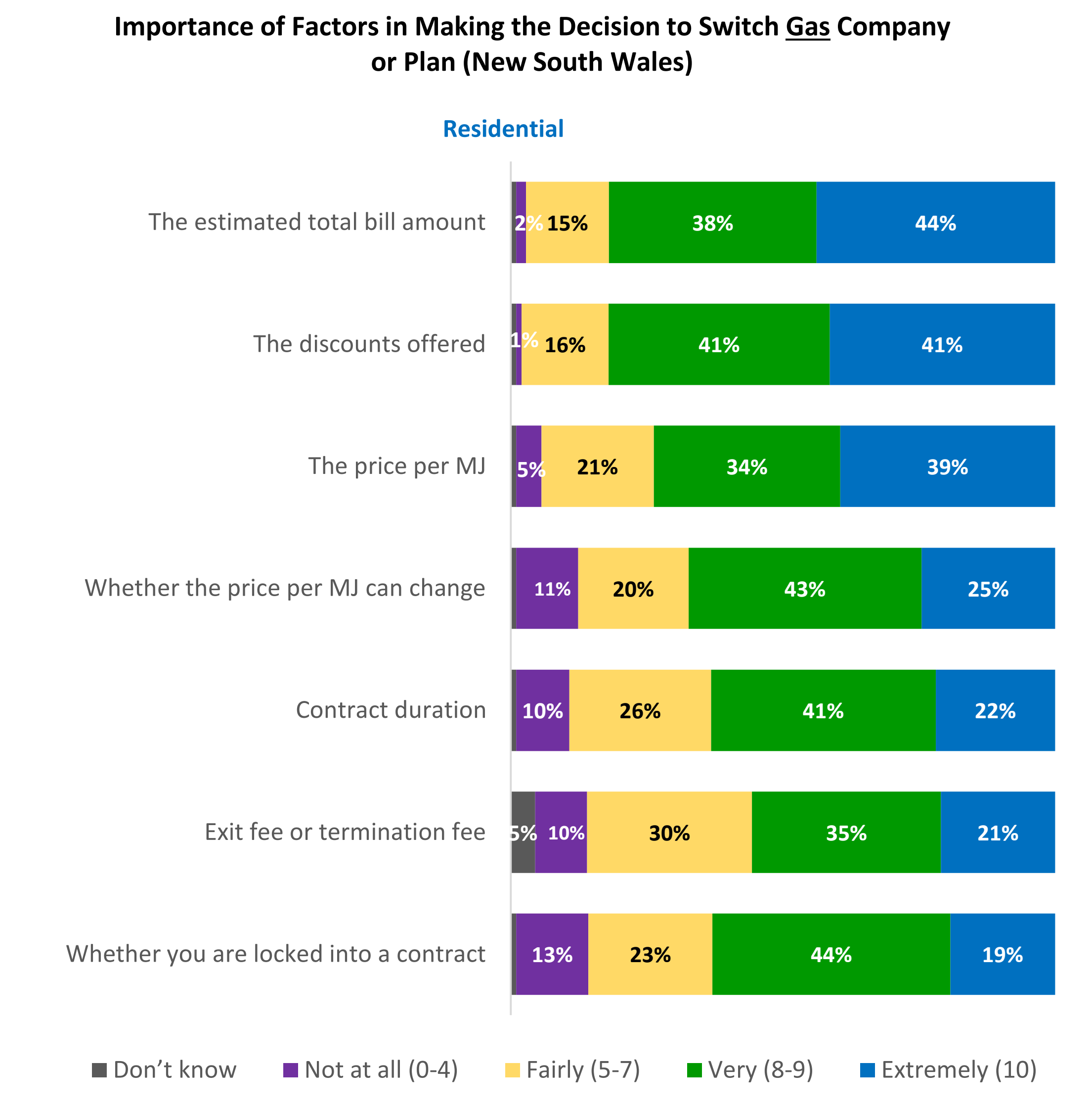
Base: Respondents who switched their electricity company or plan (Business n=53)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?



Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE

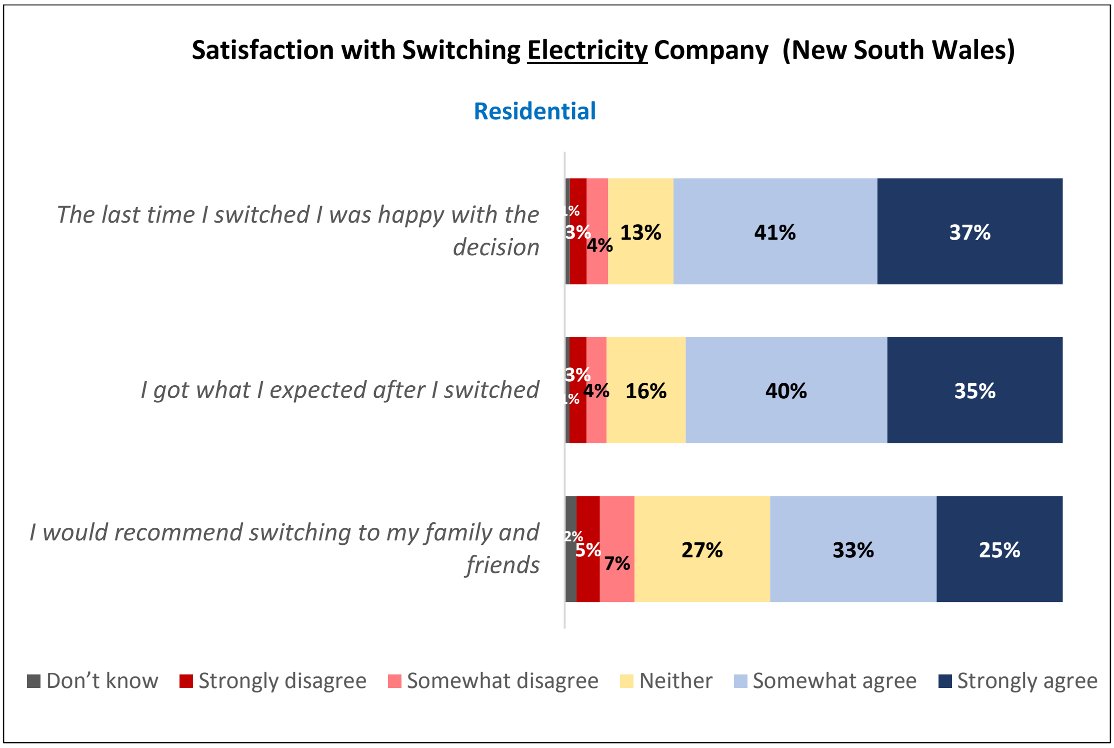


Base: Respondents who switched their gas company or plan. NB: Business results not shown due to small sample size (n=9)
Q27. You mentioned you changed your gas company or plan in the past five years. The last time you switched, what was the main reason? Any other reasons? MULTIPLE RESPONSE

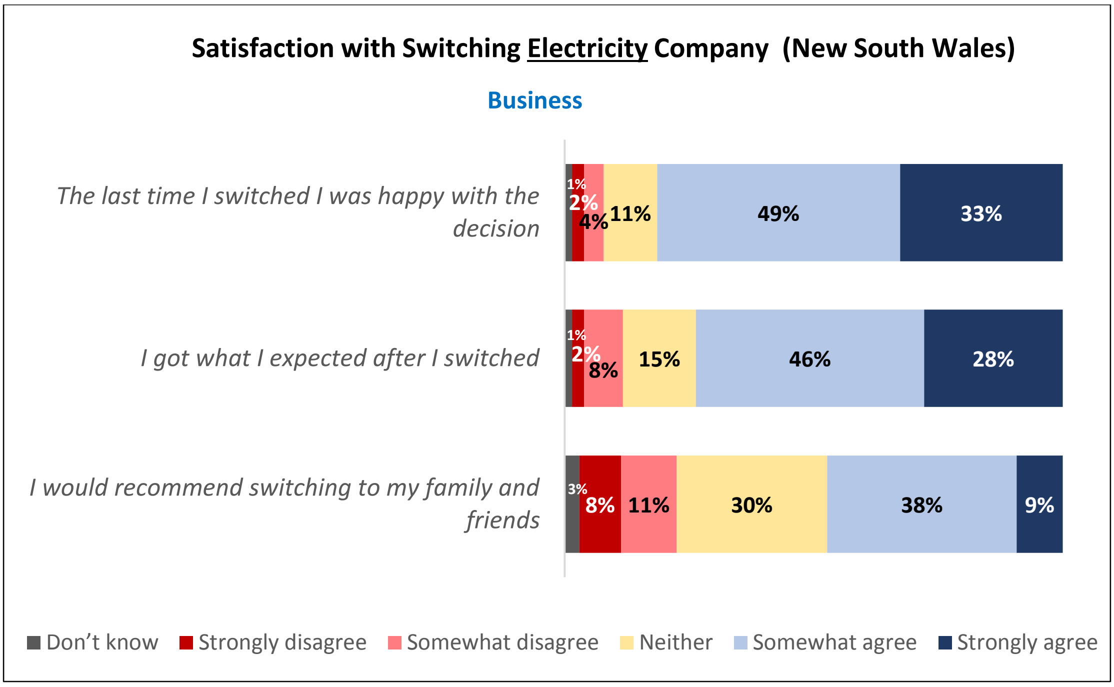


Base: Respondents who switched their gas company or plan (Residential n=66). NB: Business results not shown due to small sample size (n=9)
Q54. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your gas company or plan where 0 means not at all and 10 means extremely important?

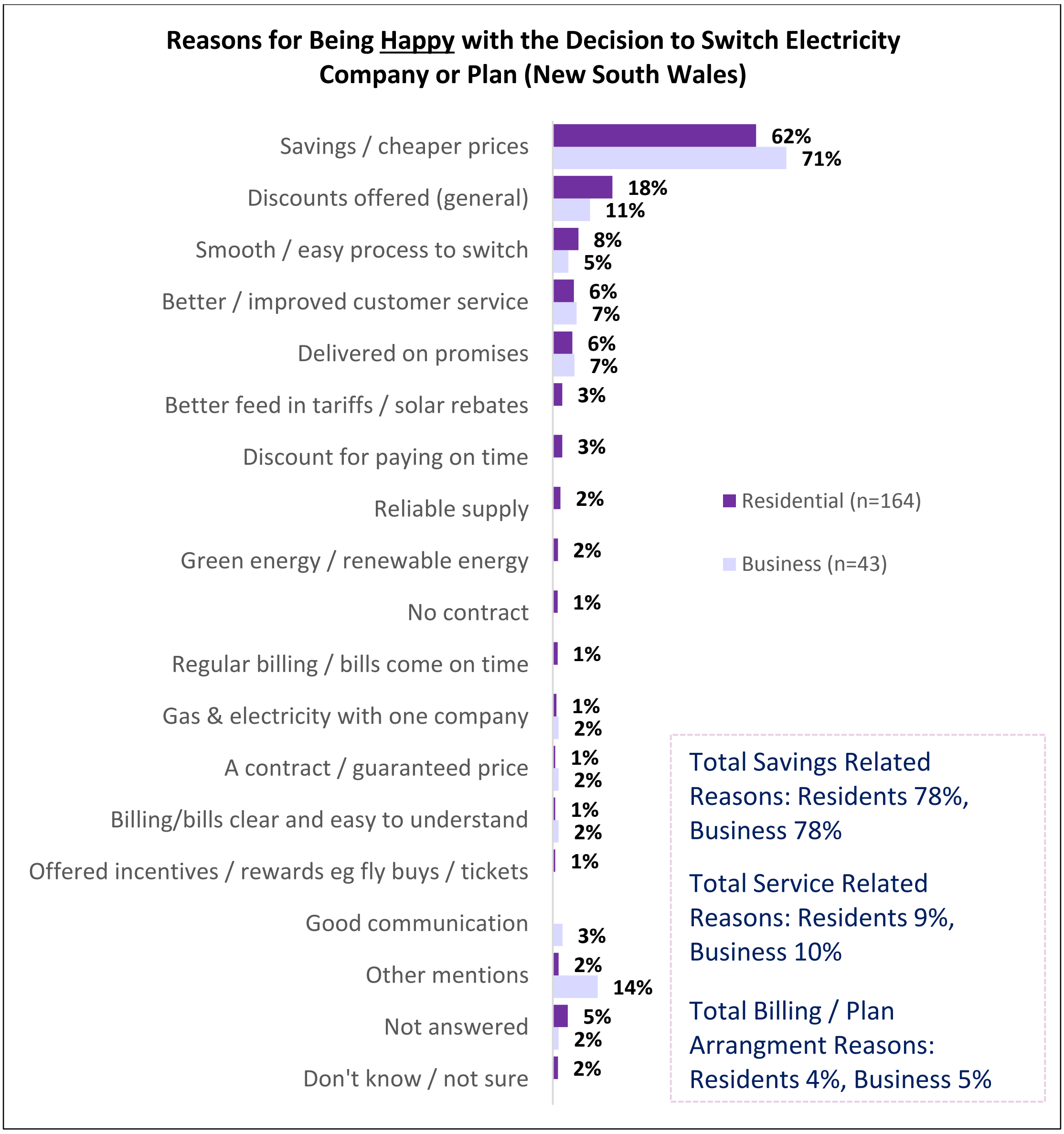
Satisfaction with Switching



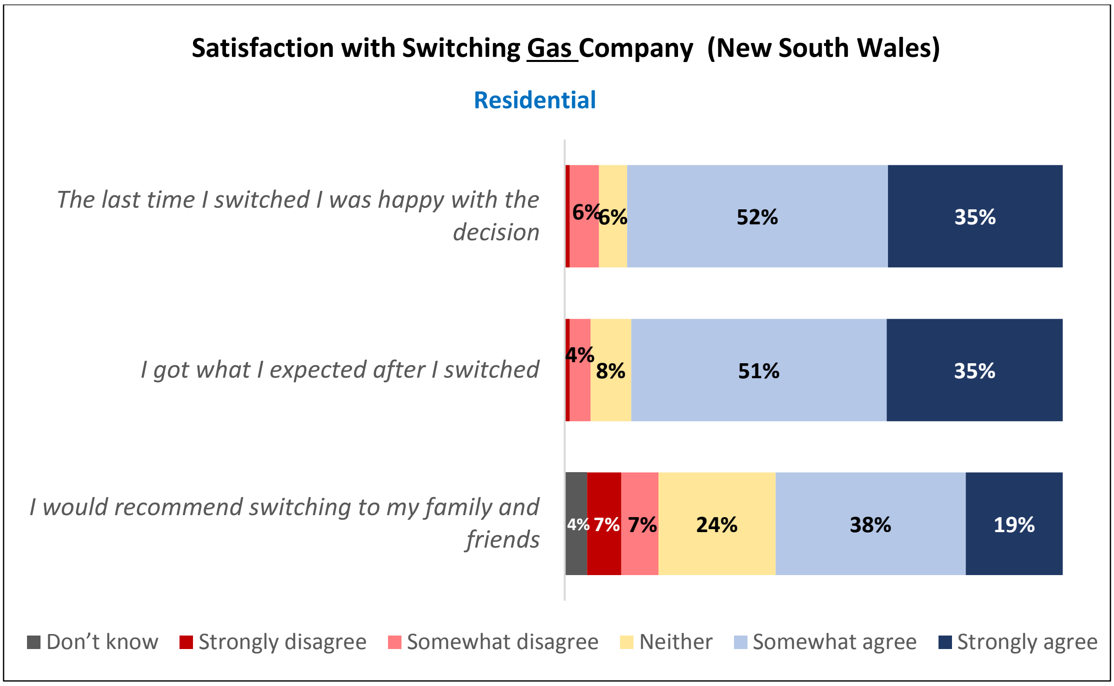
Base: Respondents who had switched their electricity company or plan (Residential n=209)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



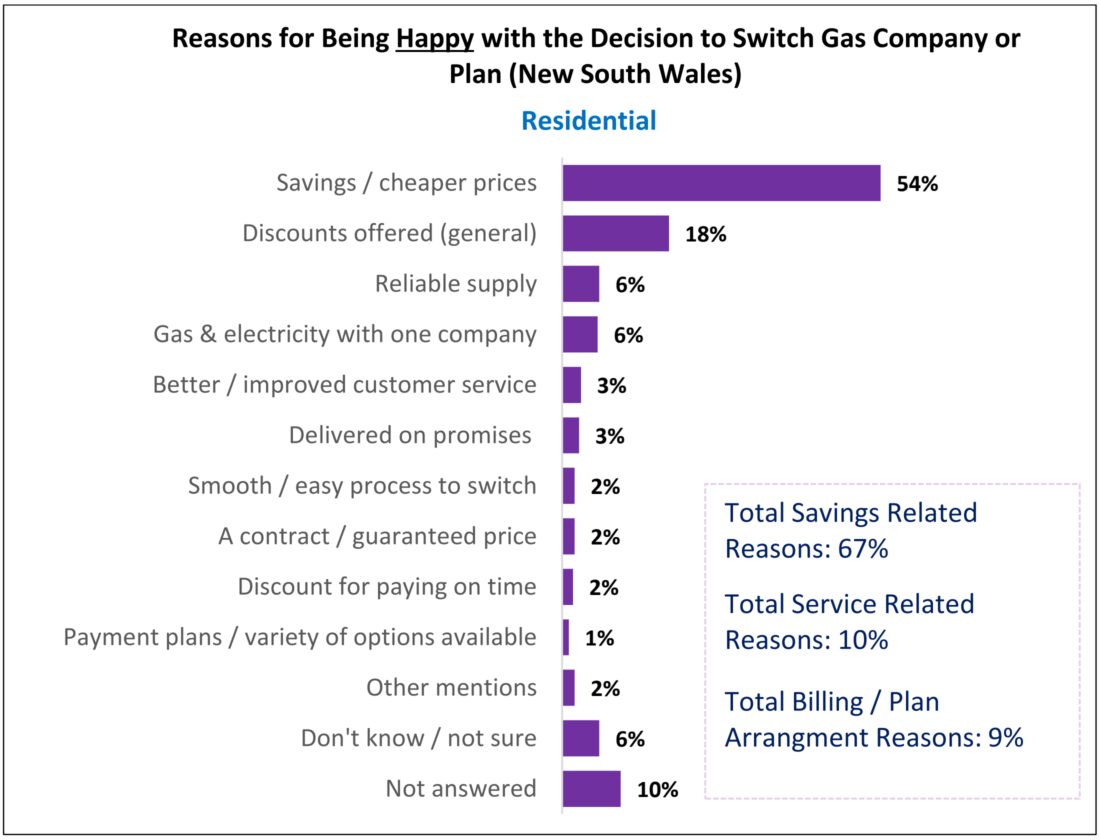
Base: Respondents who had switched their electricity company or plan (Business n=53)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



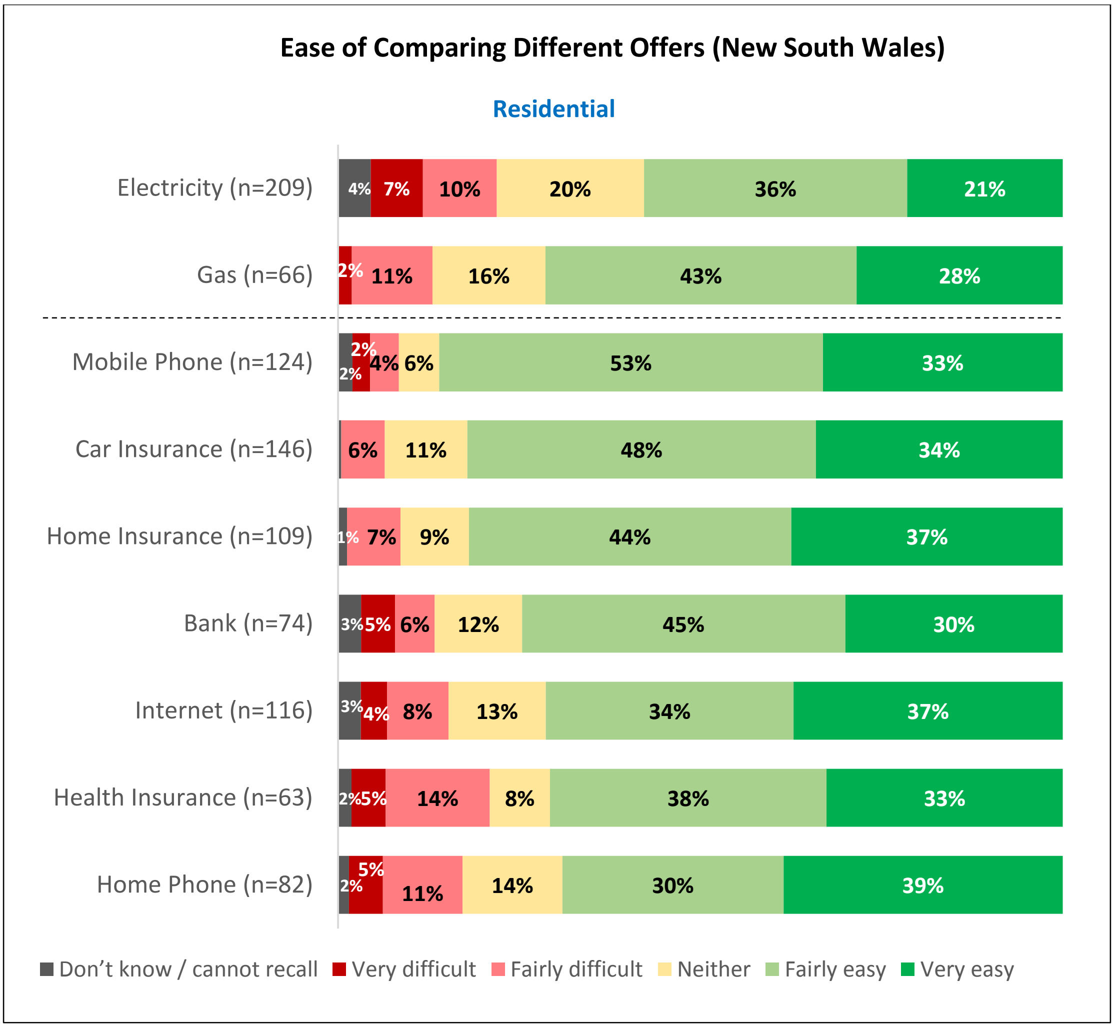
Base: Respondents who agreed they were happy with their decision to switch
Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE



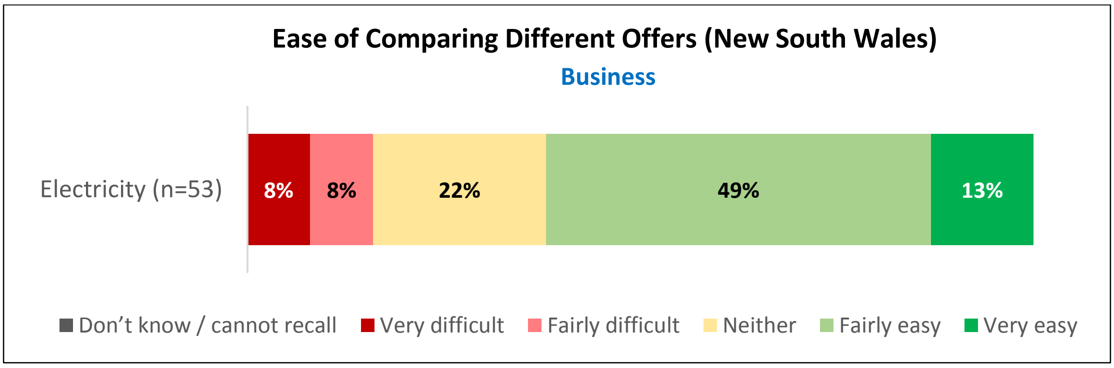
Base: Respondents who had switched their gas company or plan (Residential n=66). NB: Business results not shown due to small sample size (n=9)
Q55. And having switched your gas company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



Base: Respondents who agreed they were happy with their decision to switch (Residential: n=57). NB: Business not shown due to small sample size (n=8)
Q30B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE

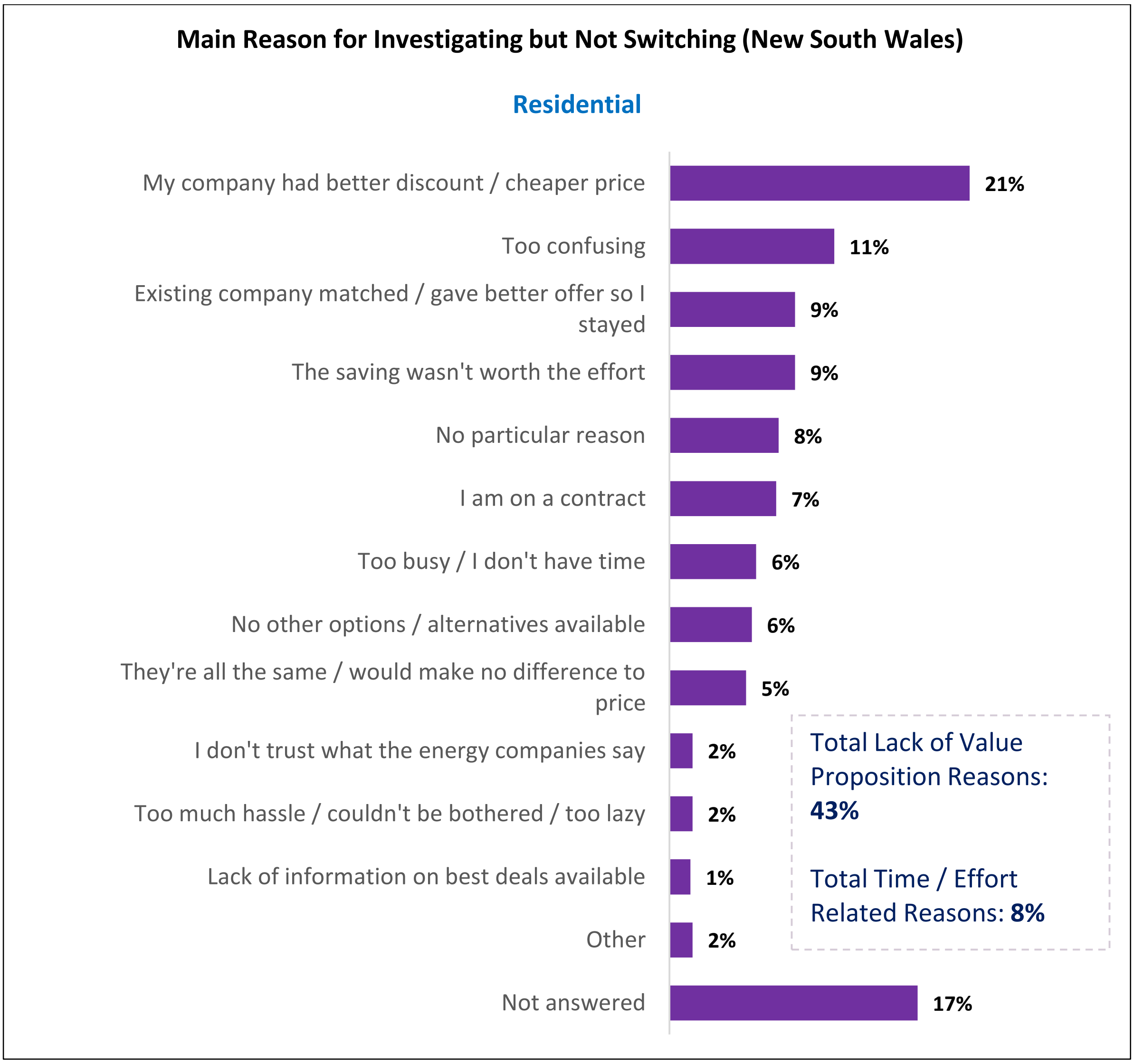


Base: Respondents who switched their company / provider or plan
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
D7a. The last time you changed your [INSERT FROM D7] provider, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

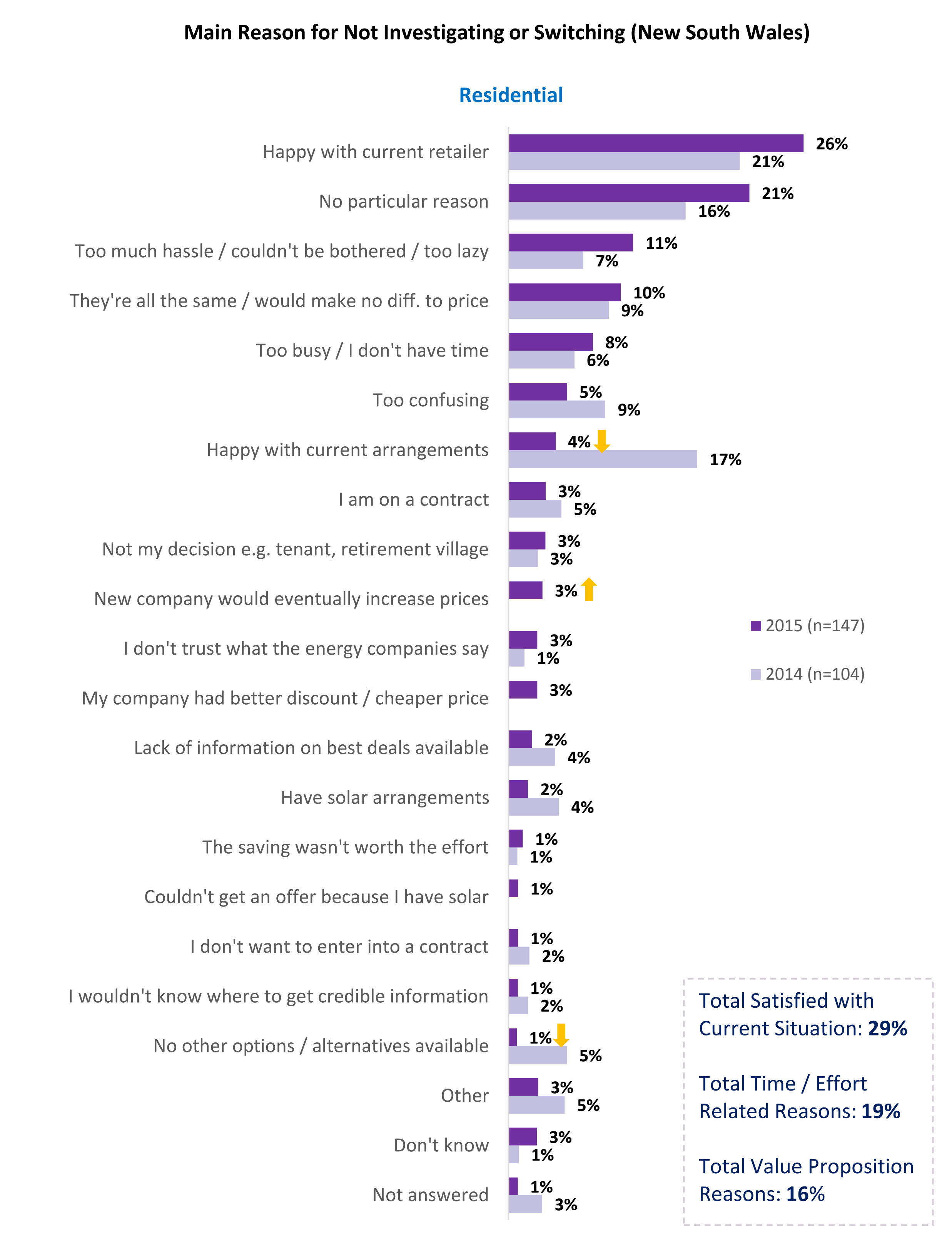


Base: Respondents who switched their company / provider or plan. NB: Results for gas not shown due to small sample size for small business (n=9)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

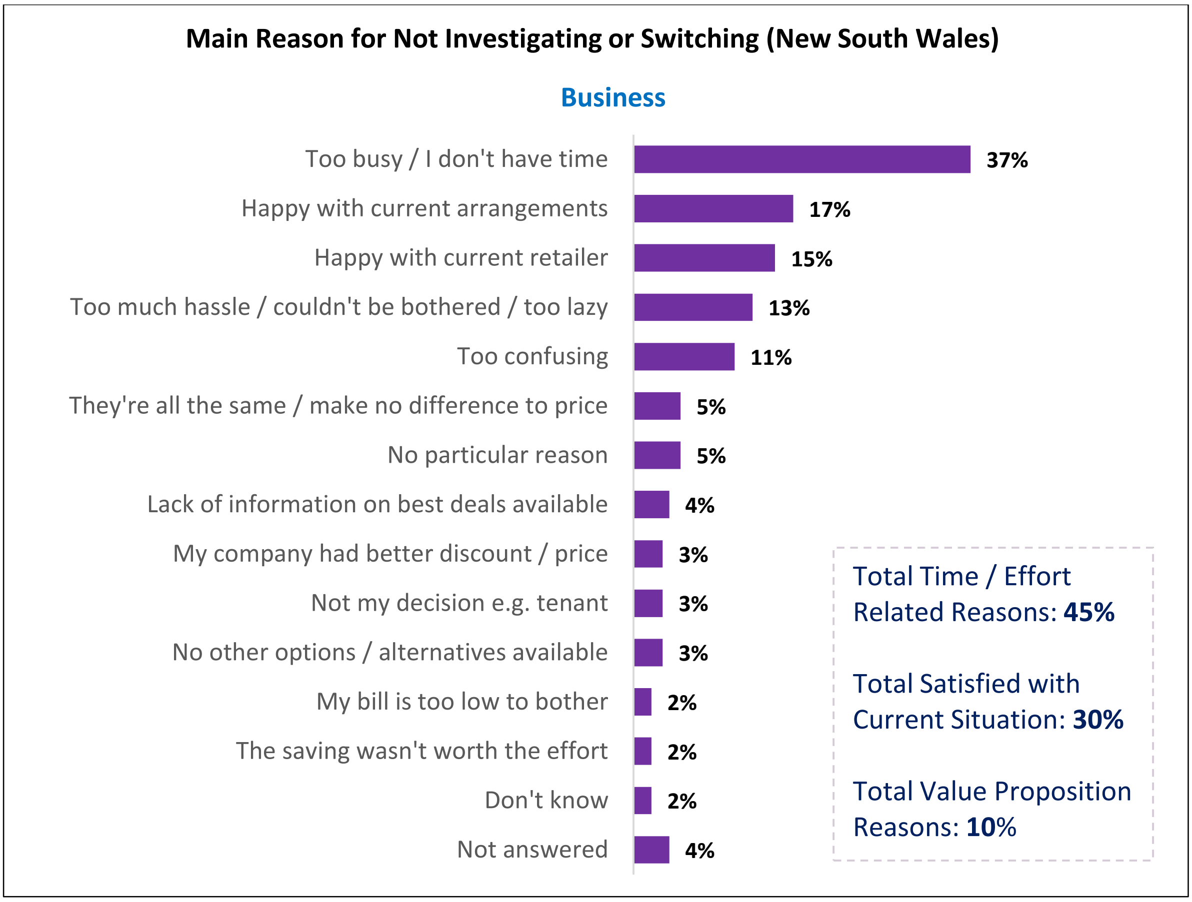
Barriers to Investigating Offers or Switching



Base: Respondents who investigated offers and options but haven't switched in the past 12 months (n=40). NB: 2014 results not shown due to small sample size (n=16). Business results not shown due to small sample size (n=4)
Q32. And what was the main reason why you investigated different offers and options but haven't changed your energy company or plan in the last 12 months? Any others? MULTIPLE RESPONSE

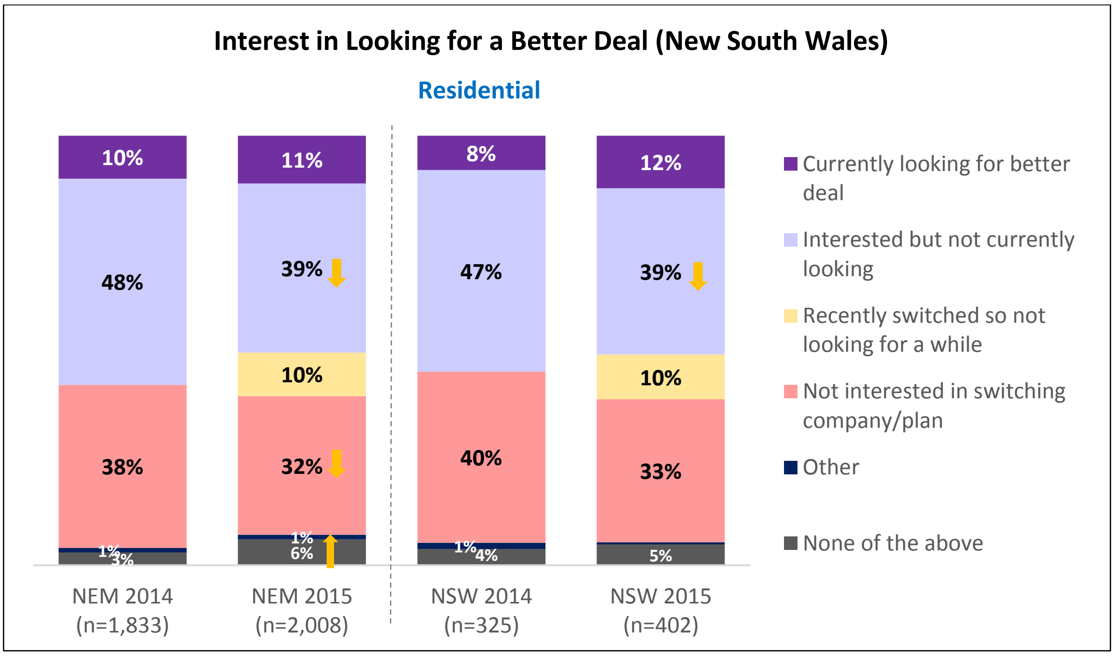


Base: Respondents who had not investigated offers and options or switched in the past 12 months Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

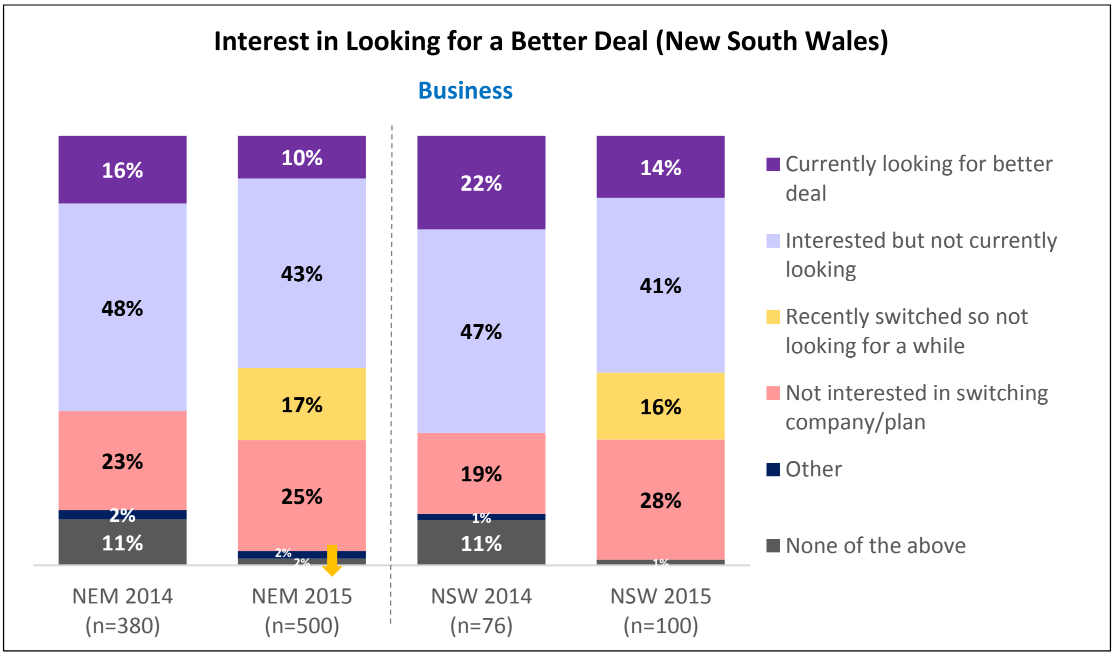


Base: Respondents who had not investigated offers and options or switched in the past 12 months (2015: n=41). NB: 2014 results not shown due to small sample size (n=10)
Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

Switching Intentions and Attitudes



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=2,008)	NSW (n=402)
Total	**$207**	**$194**
Last Quarterly Electricity Bill: Less than $300	$178	$162
Last Quarterly Electricity Bill: $300-$500	$210	$195
Last Quarterly Electricity Bill: $500 or more	$247	$228

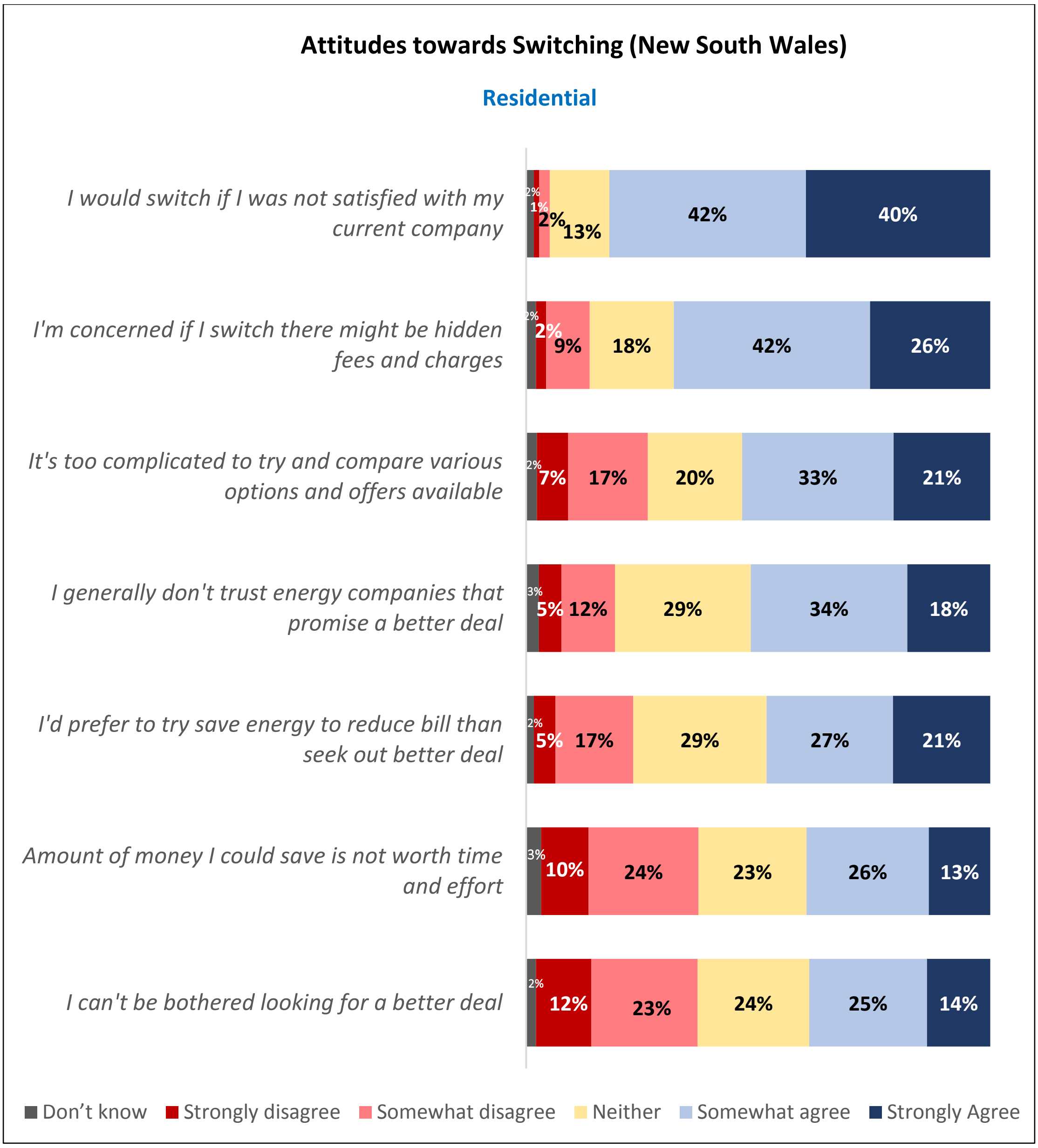
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	Business	
	NEM (n=500)	NSW (n=100)
Total	**$609**	**$695**
Last Quarterly Electricity Bill: Less than $500	$257	$216
Last Quarterly Electricity Bill: $500-$999	$462	$442
Last Quarterly Electricity Bill: $1,000 or more	$1,117	$1,264

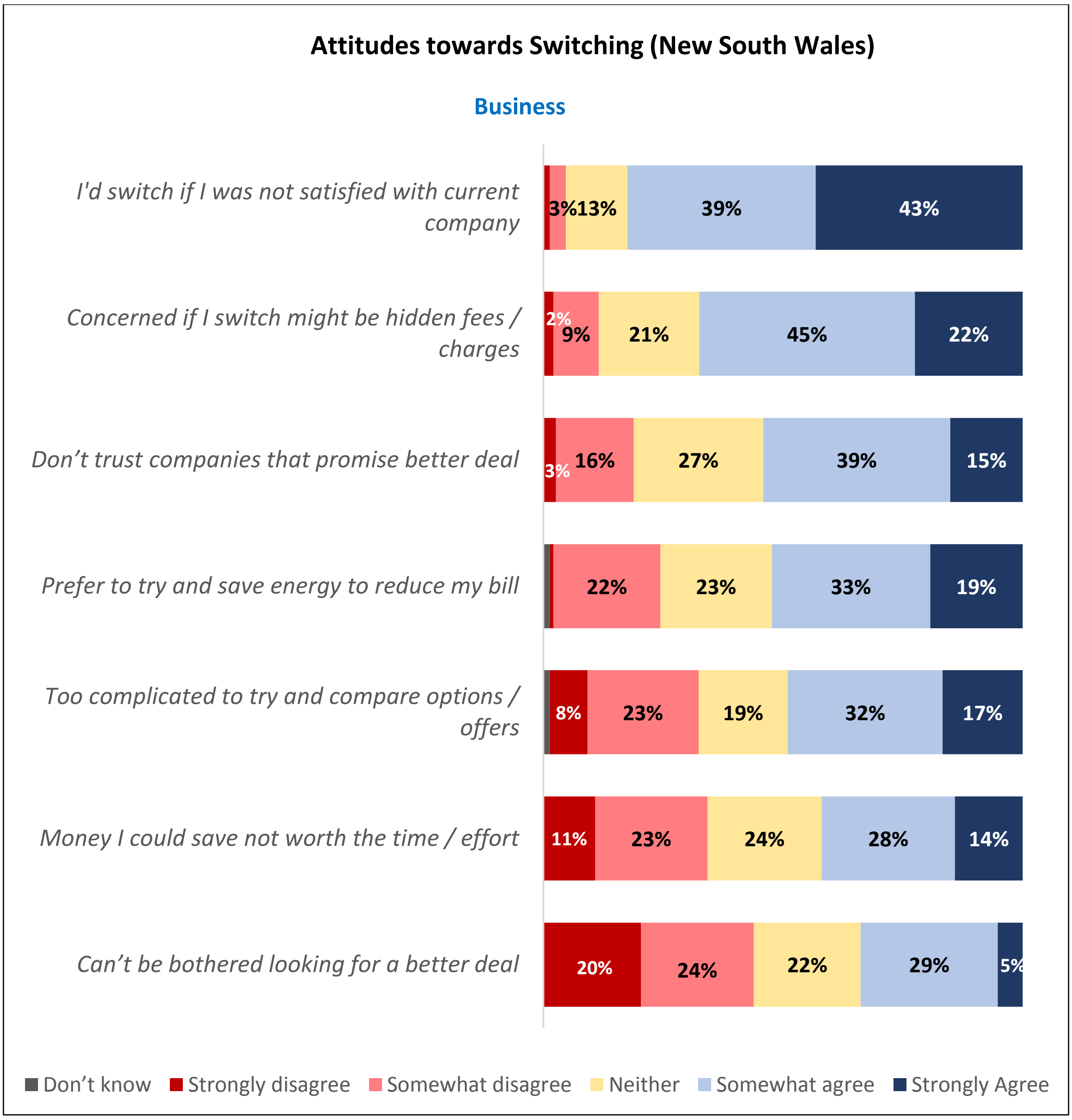
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on <u>Gas</u> Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=908)	NSW (n=163)
Total	**$162**	**$151**
Last Quarterly Gas Bill: Less than $100	$120	$85
Last Quarterly Gas Bill: $100-$299	$163	$158
Last Quarterly Gas Bill: $300 or more	$169	$157

Base: Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=21)
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?



Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=100)

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

3.2.3 Consumer Satisfaction with the Market

Summary of Findings

Satisfaction with the level of choice in NSW increased significantly among residents from 47% being very or somewhat satisfied in 2014 to 60% in 2015. Satisfaction among business consumers remained fairly consistent in 2015 (48% were very or somewhat satisfied). Satisfaction in NSW was in line with the NEM average. It is important to note however, that the previous qualitative research conducted in 2013 suggests that many consumers are unaware of the extent of choice available and few can differentiate between energy offers.

When it comes to satisfaction with current electricity and gas companies, the 2015 results were very consistent with 2014 and the results in NSW were also very consistent with the NEM averages. Residential consumers tended to rate their energy company higher than small business consumers.

Consistent with 2014, ratings of gas companies were higher than those awarded for electricity companies.

Electricity

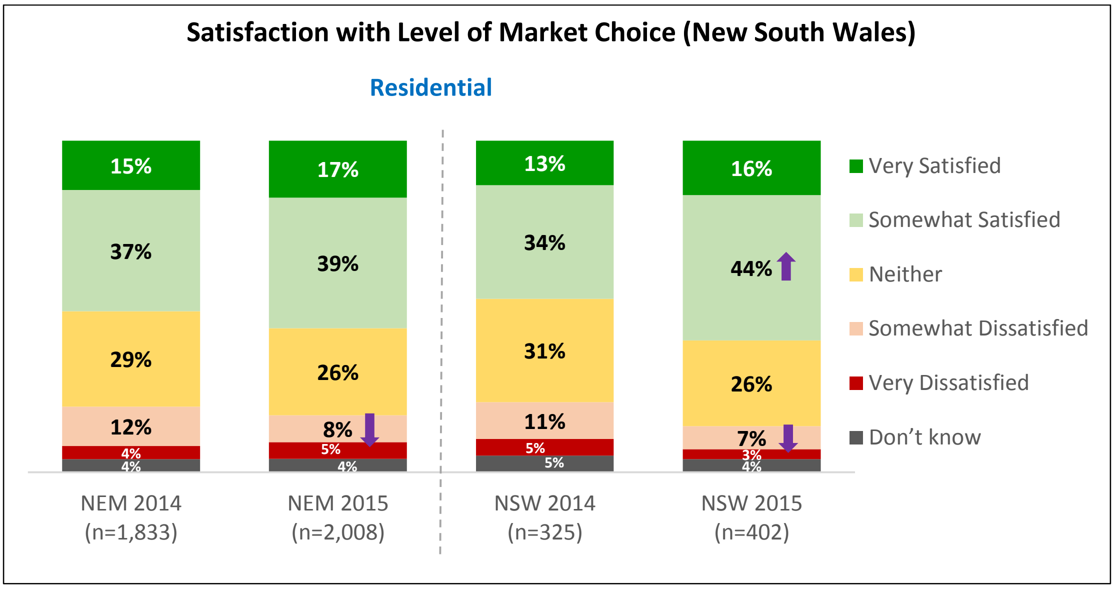
- Three quarters of residential consumers (74%) and six in ten small business consumers (61%) were very or somewhat satisfied with their current electricity company. Results were very consistent among different segments.
- Two thirds of residential consumers (65%) and under half of small business consumers (45%) rated the overall quality of customer service provided by their electricity company quite highly (rating of 7 or more out of 10). Those with mains connected gas, younger consumers and those on a payment arrangement rated the quality of customer service significantly higher.
- Just over half of residential consumers (56%) and a third of small business consumers (32%) rated the overall value for money provided by their electricity company quite highly (rating of 7 or more).

Gas

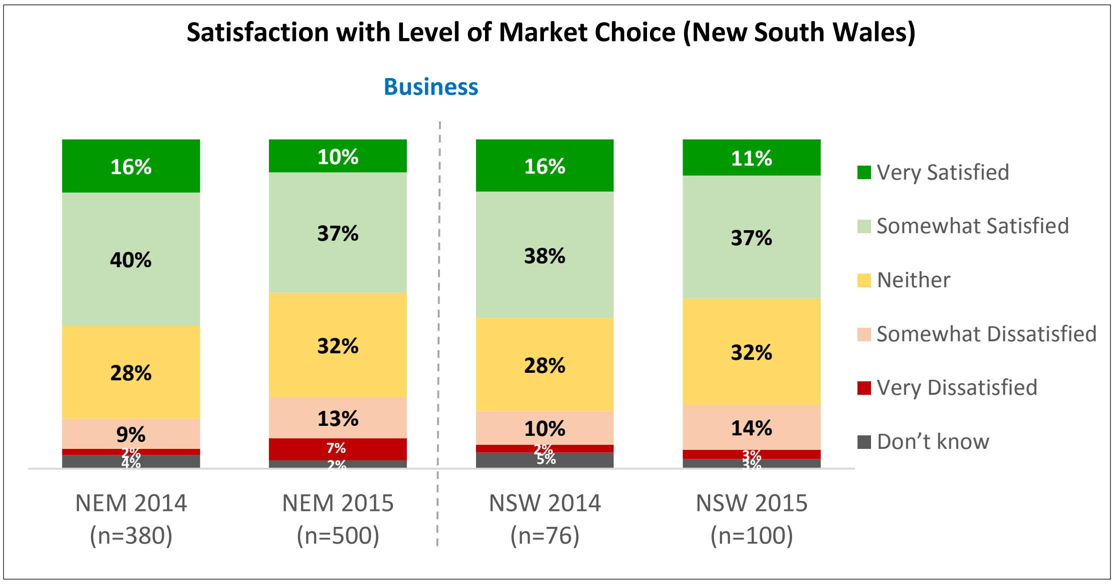
- Eight in ten residential consumers (79%) were very or somewhat satisfied with their current gas company. Results were very consistent among different segments.
- Seven in ten residential consumers (72%) rated the overall quality of customer service provided by their gas company quite highly (rating of 7 or more out of 10). Younger consumers, home owners and those on a payment arrangement rated the quality of customer service significantly higher.
- Six in ten residential consumers (61%) rated the overall value for money provided by their electricity company quite highly (rating of 7 or more). Home owners and those on a payment arrangement rated the overall value for money significantly higher.

The Results

Satisfaction with Level of Choice

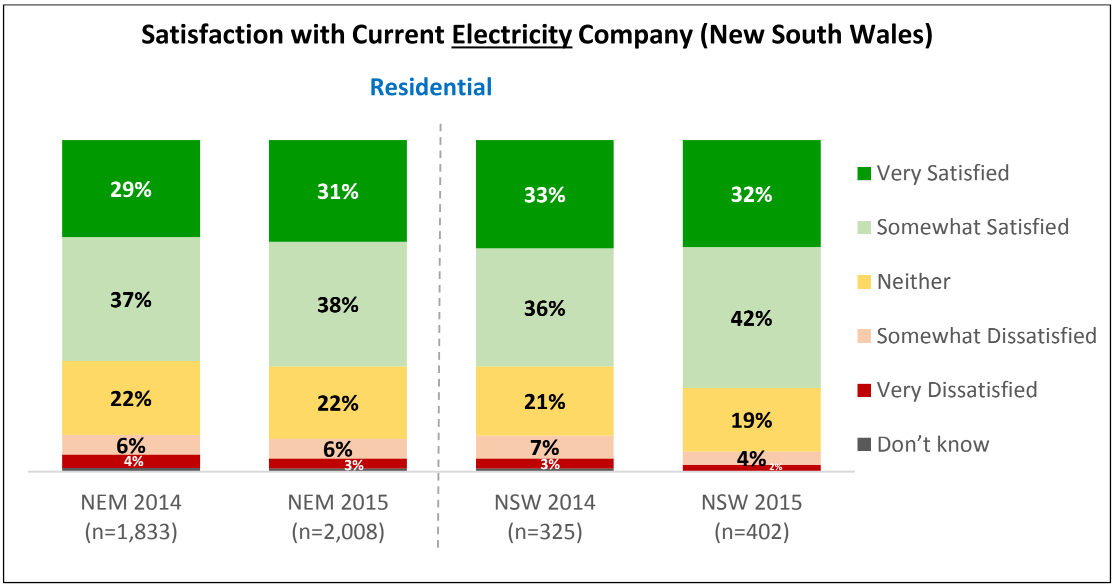


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

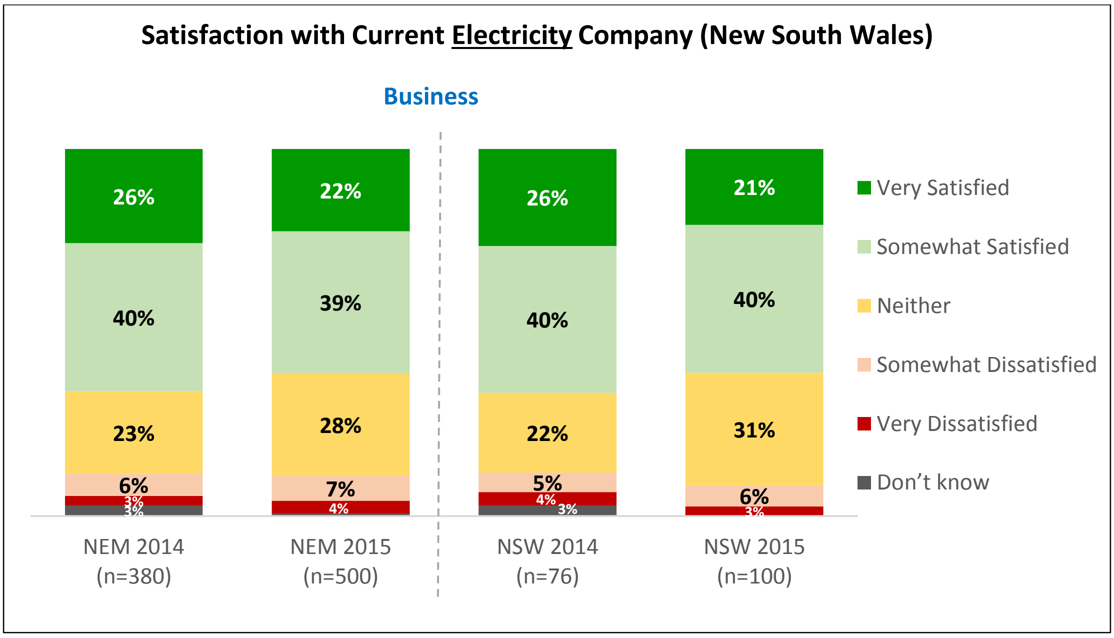


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

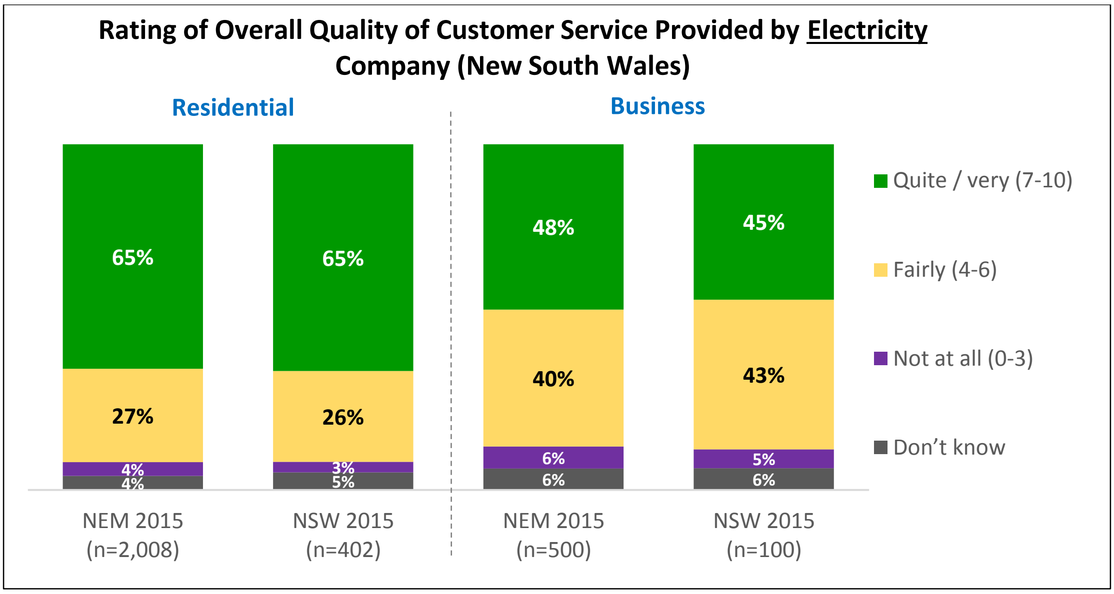
Satisfaction with Electricity Companies



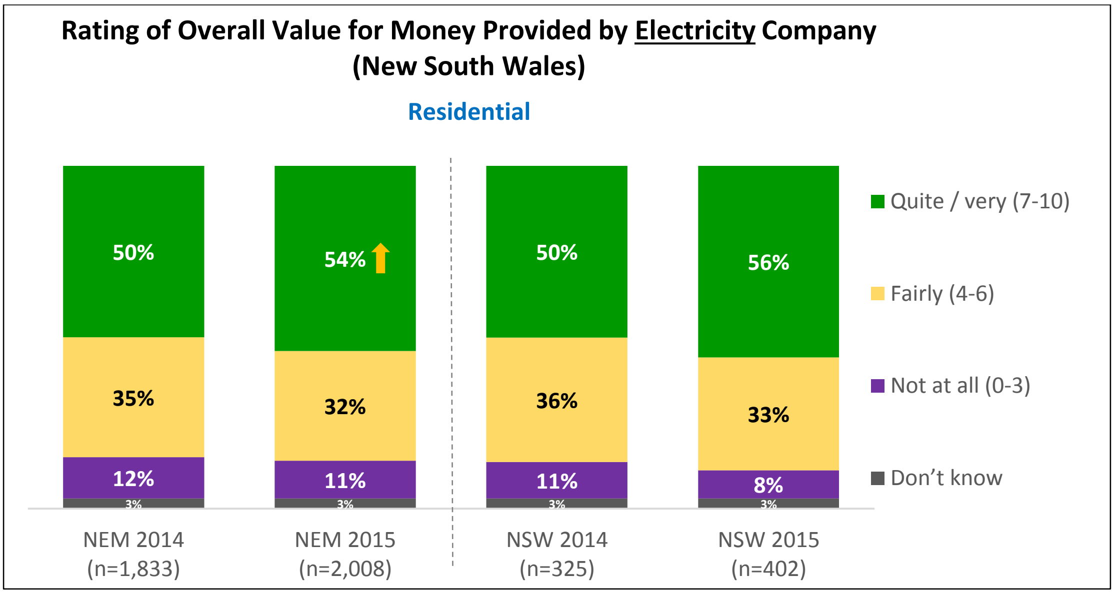
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



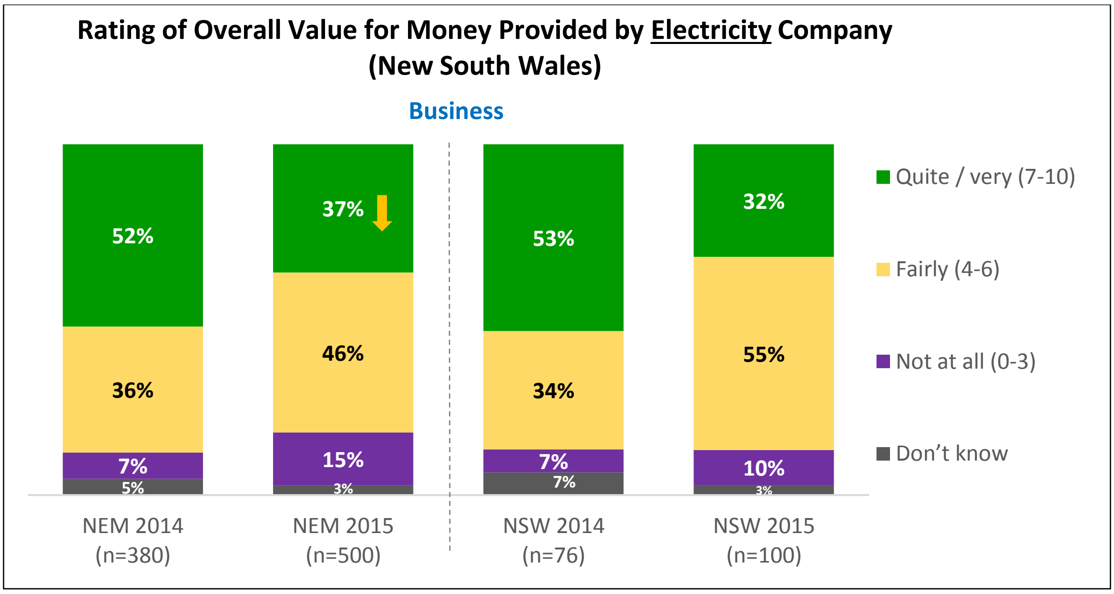
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



Base: All Respondents (n=402)
Q3. How would you rate the overall quality of <u>customer</u> service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

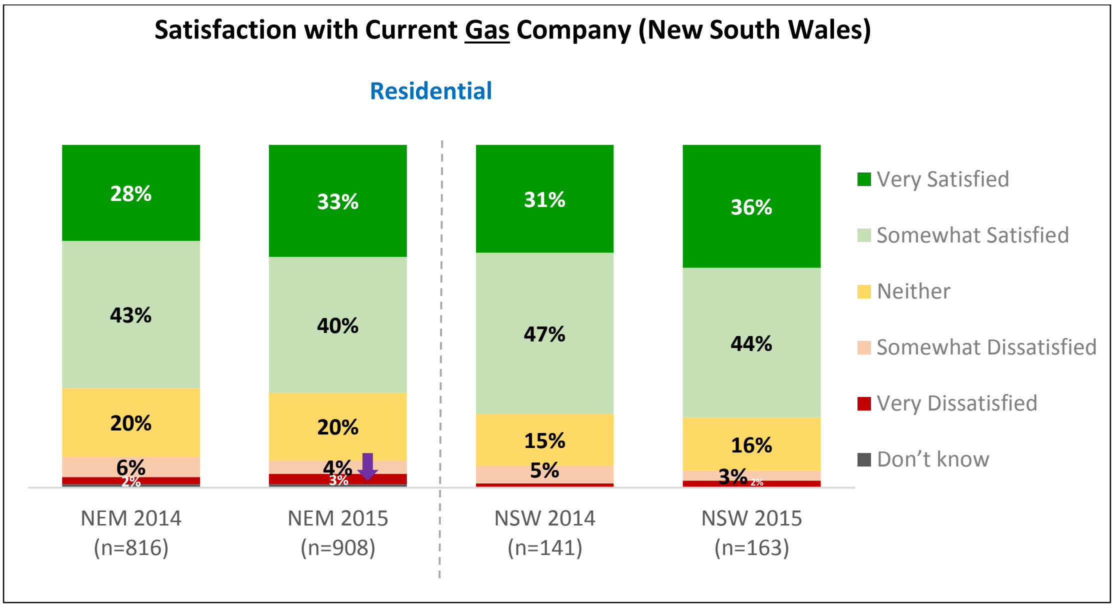


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

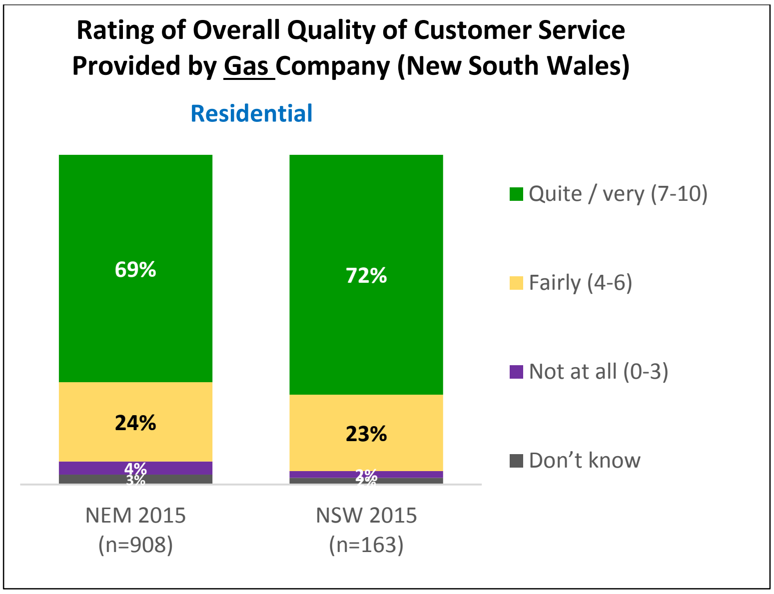


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

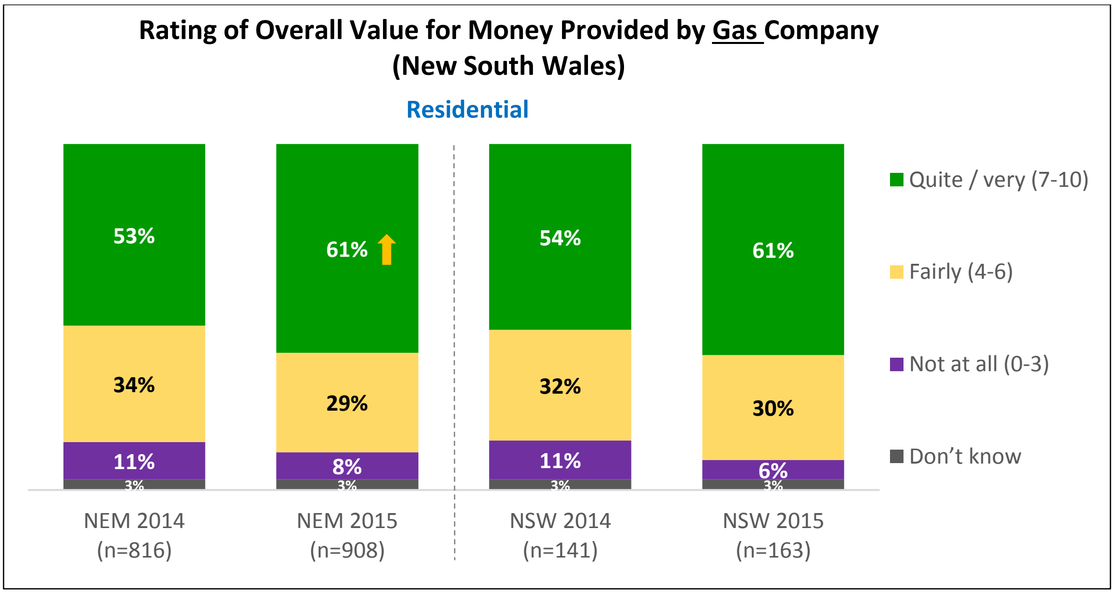
Satisfaction with Gas Companies



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=21)
Q7. And how satisfied are you with your current gas company?



Base: All Respondents. NB: Business results not shown due to small sample size (n=21)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=21)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

3.2.4 Information Sources and Gaps

Summary of Findings

As was the case in 2014 the internet was the most popular information source used to help consumers to switch energy company or plan or investigate offers, with some mentioning Google and some a general internet search. Internet based information sources were deemed most useful among those who had switched or investigated their options and were also the most preferred for looking for information about different energy retailers or plans in future.

When prompted, around four in ten consumers (43% residential, 39% small business) said they had used a price fact sheet to understand the details of the electricity offer when they switched. Around half (48% residents) used a price fact sheet when they switched their gas company or plan. Among those who investigated offers but didn't switch, six in ten (62% residents) said they had used a price fact sheet when prompted.

When it comes to confidence in finding the right information to choose a suitable energy plan, just over half of residential consumers (55%) and under half of business consumers (45%) were quite or very confident (rating 7 or more out of 10). These results were in line with the NEM averages.

Younger consumers, those on special payment arrangements, those who had been approached by an energy company or those who had actively investigated different options or offers were significantly more confident in being able to find the right information. These confidence levels were very similar to those relating to choosing the right energy options or offer for the household and the two questions were fairly correlated (0.65) suggesting that confidence in choosing the right energy deal is closely linked with being able to find the right information.

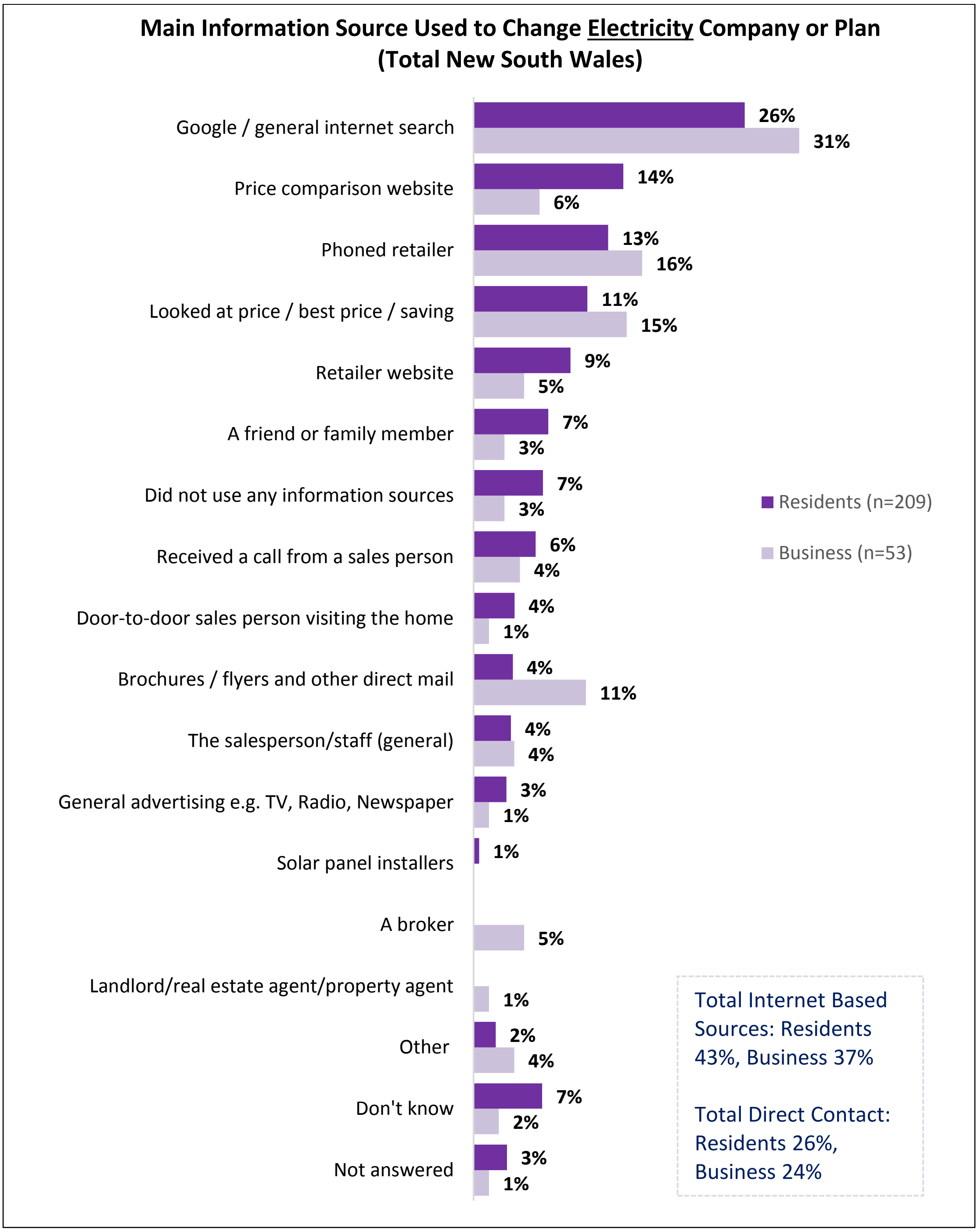
Unprompted awareness of comparison websites remained quite low in 2015. Two thirds of consumers (65% residential, 73% small business) could not name any comparison sites at all and a further 3% were aware there were comparison sites but could not recall any specific names. Among both residential (12%) and small business consumers (10%), iSelect was the most commonly mentioned comparison site. A smaller proportion of consumers also recalled Choosi (4% residential, 0% small business) or Compare the Market (3% residential and small business).

When prompted, around one in six residents (16% up from 11% in 2014) and just 4% of small business consumers (down from 26% in 2014) had heard of *energymadeeasy.*

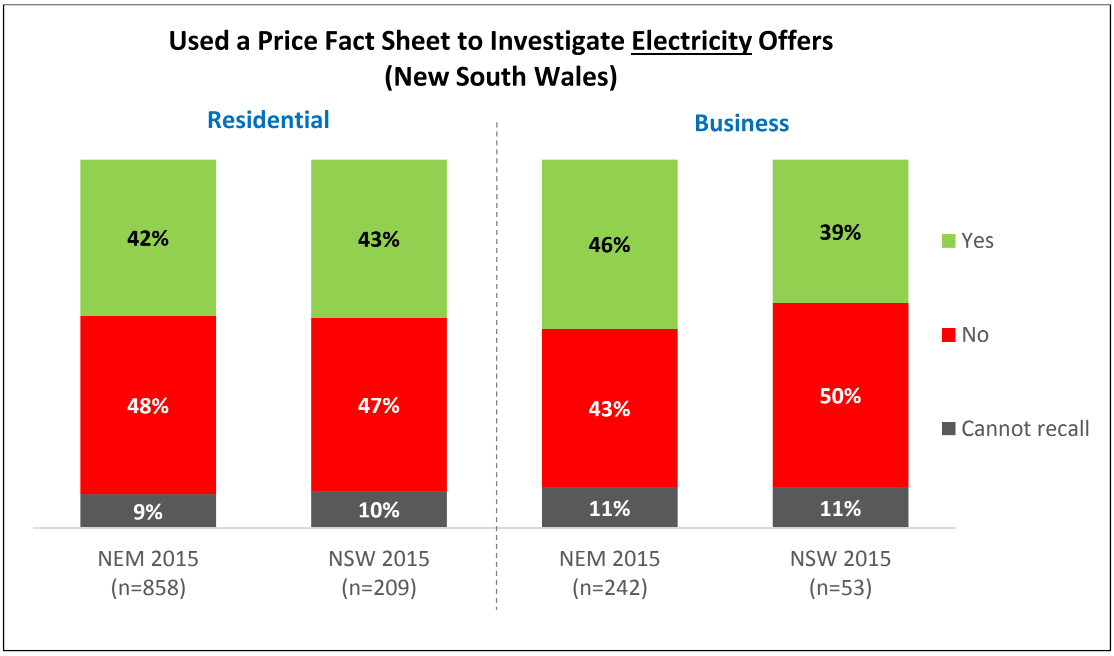
Respondents were also asked if they had heard of the NSW Government's 'Power is In Your Hands' campaign or the government website called *yourenergy.nsw.gov.au.* One in ten residential consumers had heard of the campaign (12%, 4% of small business consumers) or the website (10%, 7% of small business consumers).

The Results

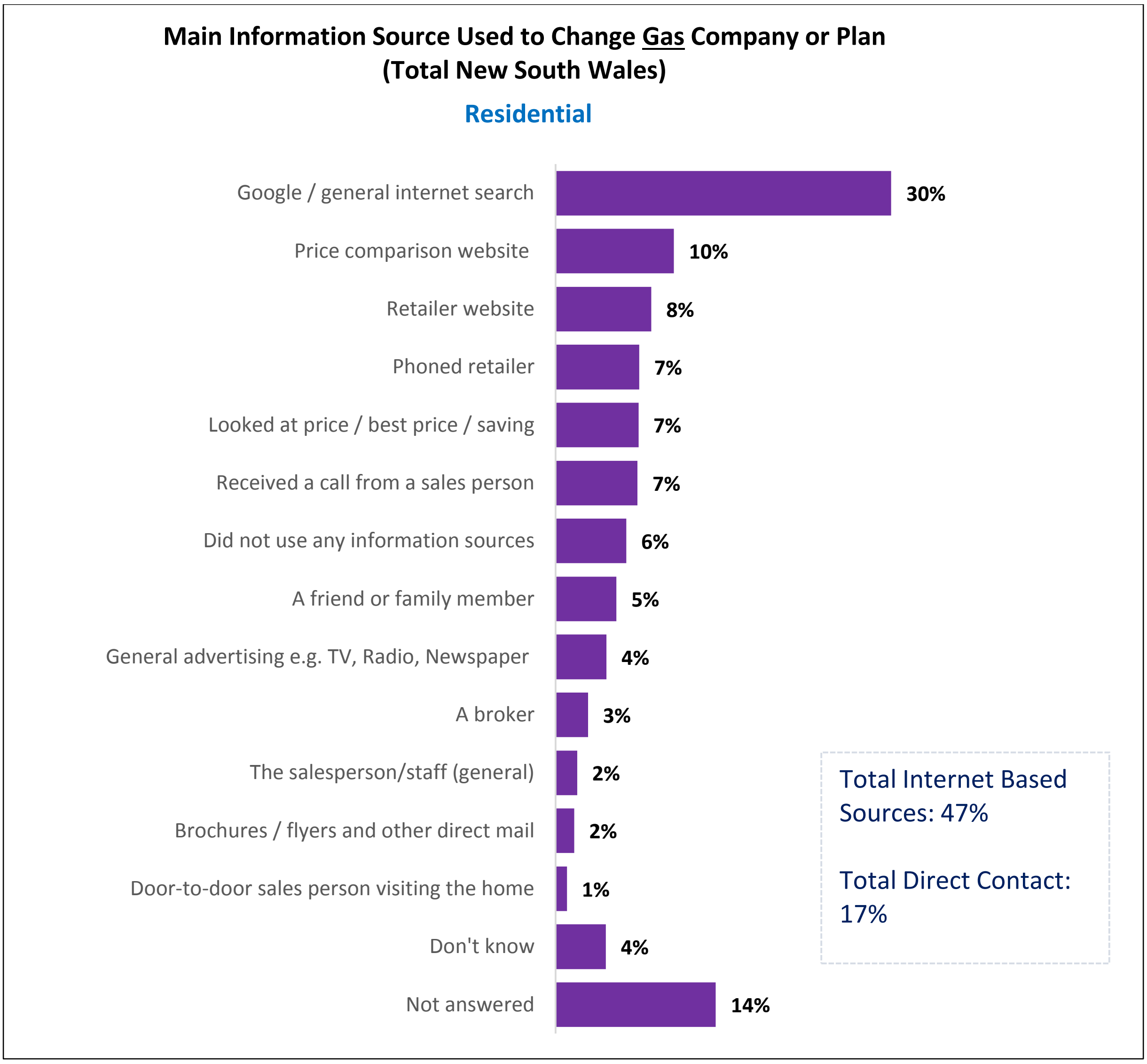
Information Sources Used to Investigate Offers or Switch



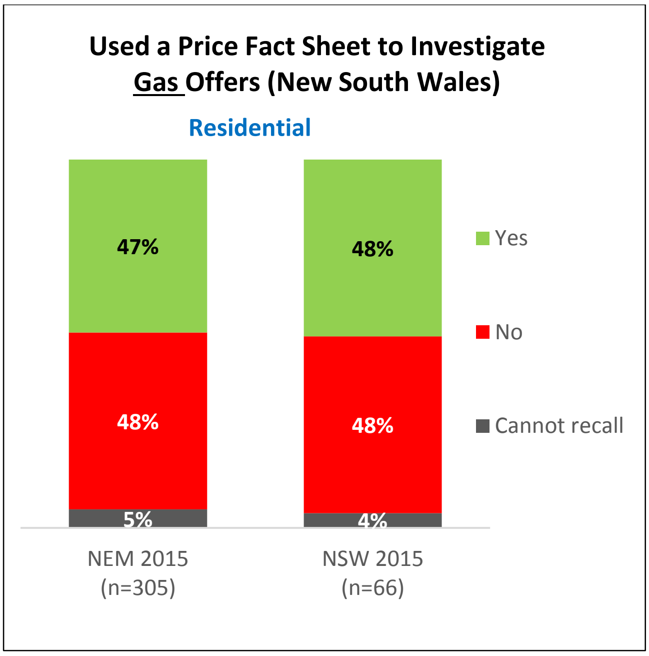
Base: Respondents who had switched electricity company or plan in the past five years
Q23. The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



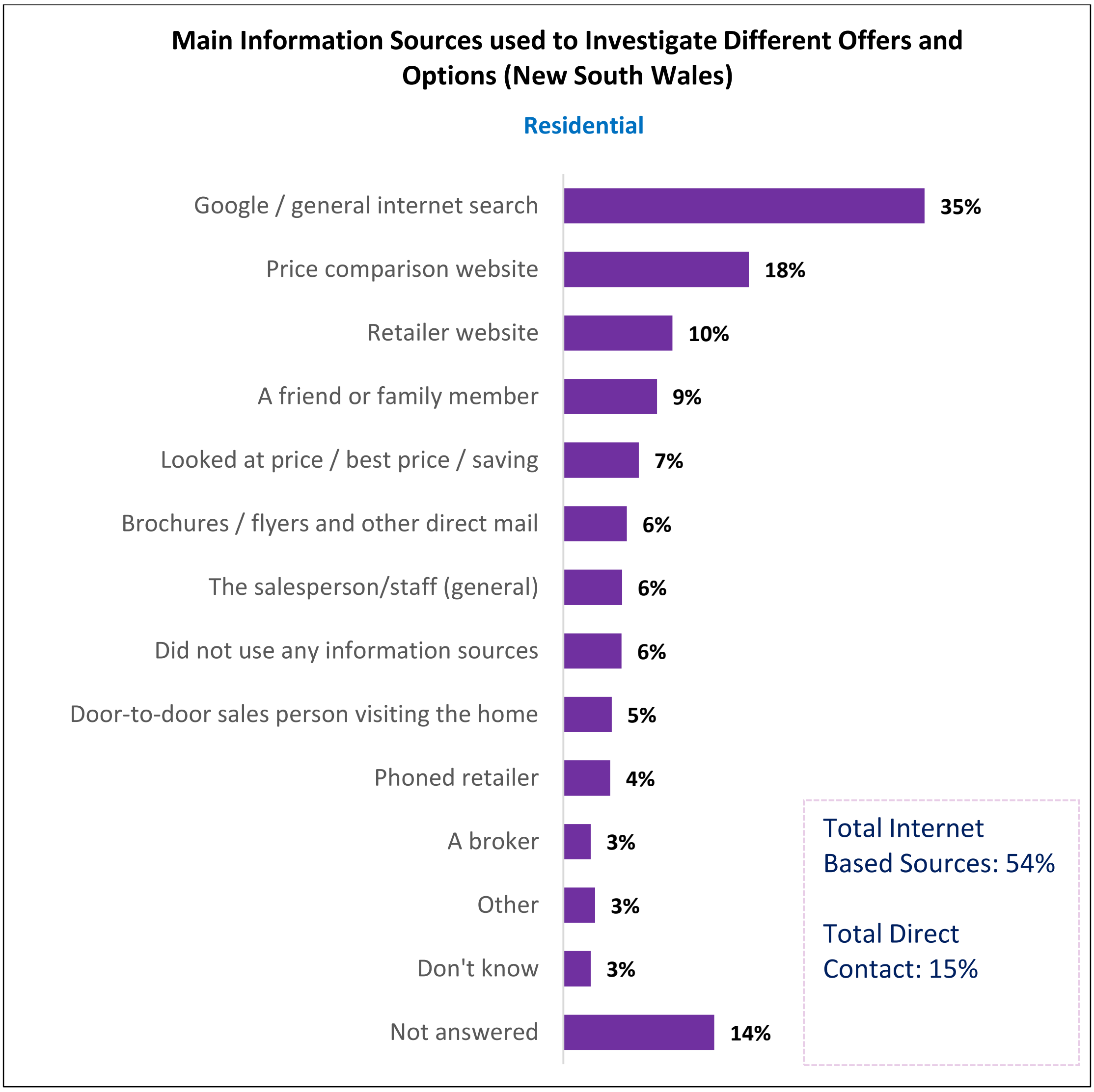
Base: Respondents who had switched electricity company or plan in the last five years
Q48. The last time you investigated changing your electricity company or plan, did you use a price fact sheet to understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.



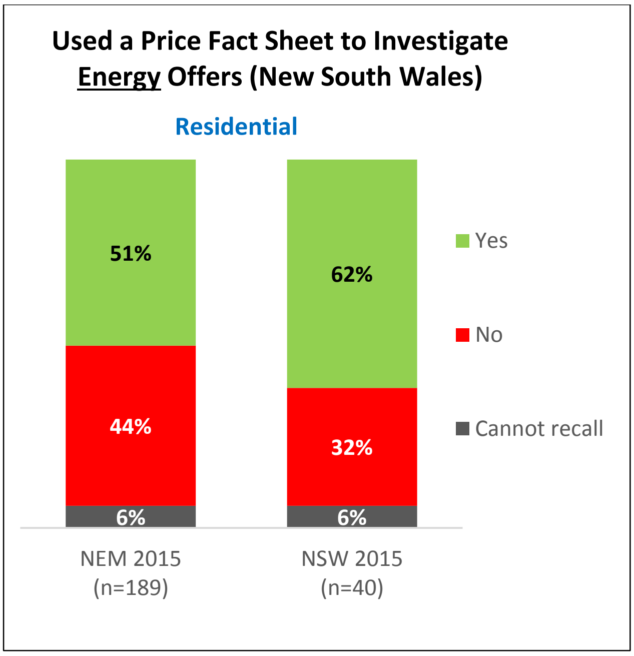
Base: Respondents who had switched gas company or plan in the past five years (n=66). NB: Business results not shown due to small sample size (n=9)
Q28. The last time you changed your gas company or plan, what information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



Base: Respondents who had switched gas company or plan in the last five years. NB: Business results not shown due to small sample size (n=9)
Q53. The last time you investigated changing your gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

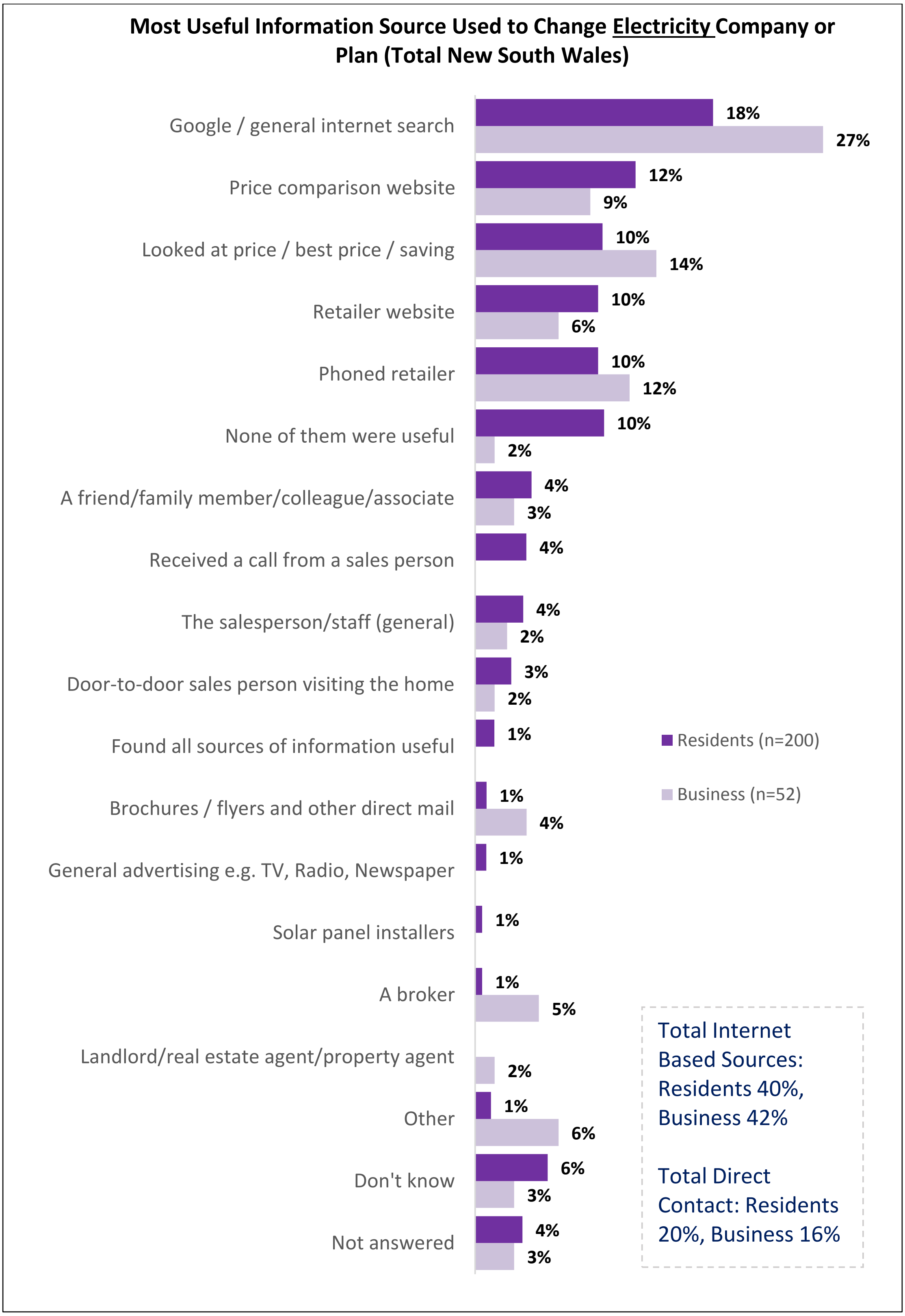


Base: All Residential Respondents who had investigates offers or options (n=40)
Q31. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your investigation? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE

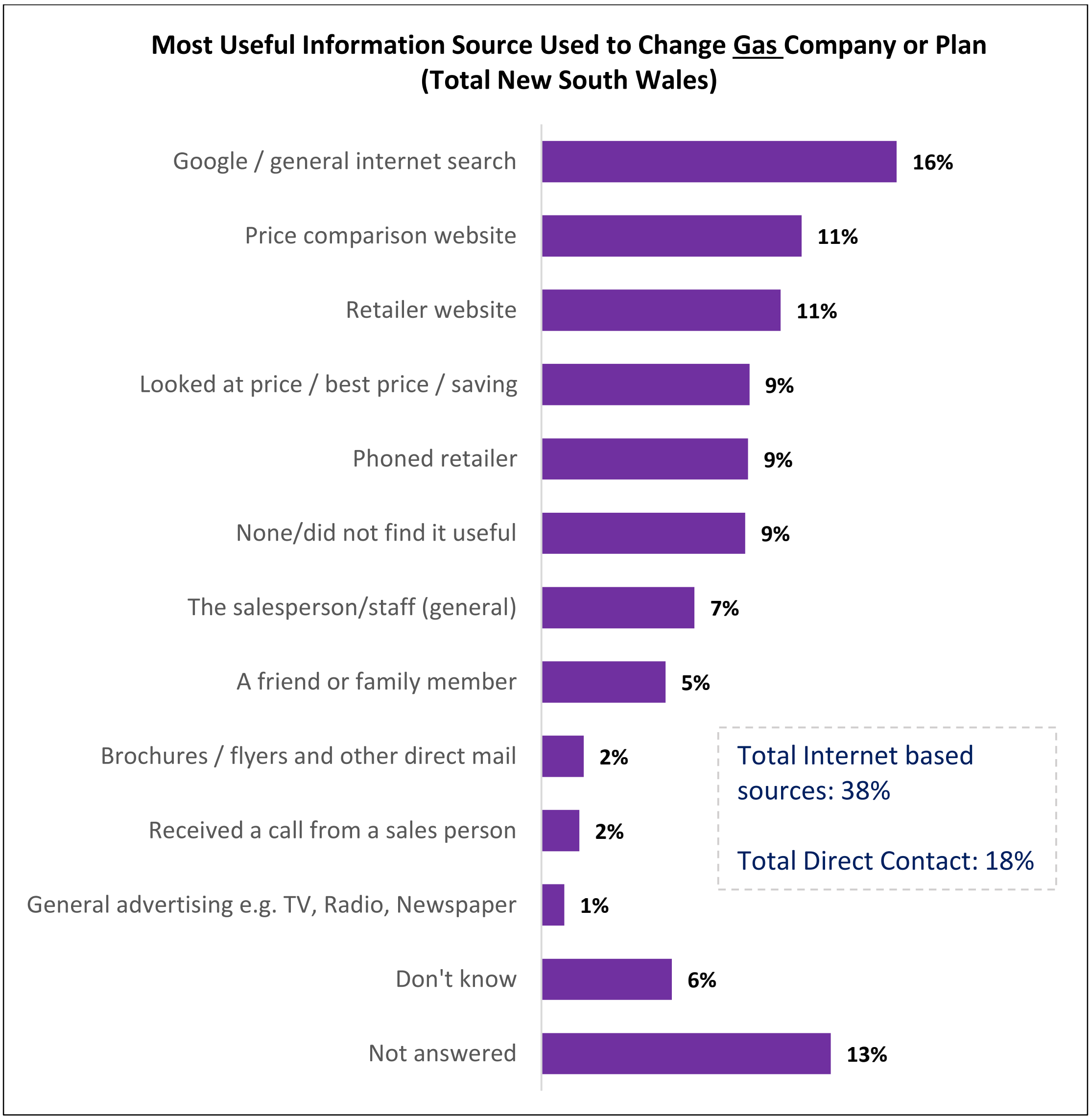


Base: Respondents who had not switched company or plan in the past five years but had investigated different options in the last 12 months. NB: Business results not shown due to small sample size (n=4)
Q58. The last time you investigated changing your electricity or gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

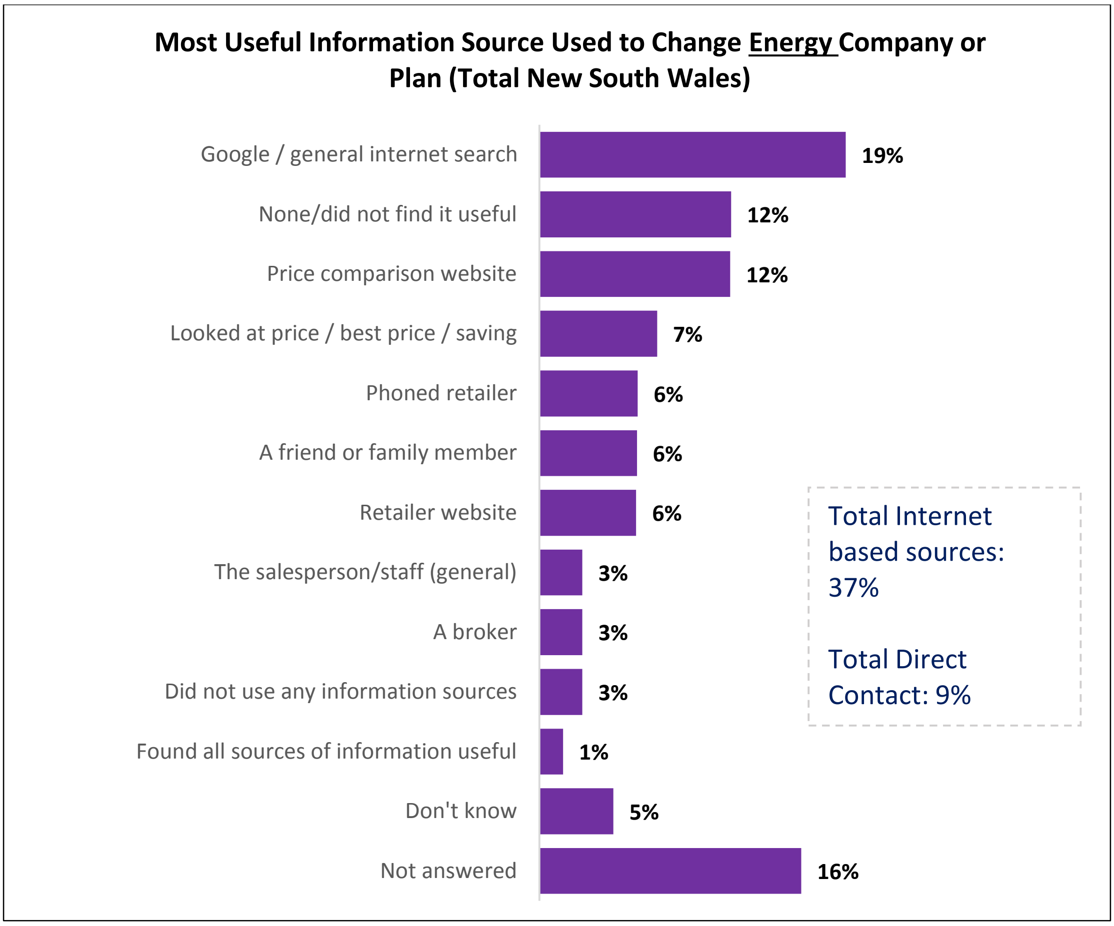
Most Useful Information Sources



Base: Respondents who had switched electricity company or plan in the last five years
Q47. And thinking about the information sources you used when changing your electricity company or plan, which one was most useful in helping with your decision to switch?

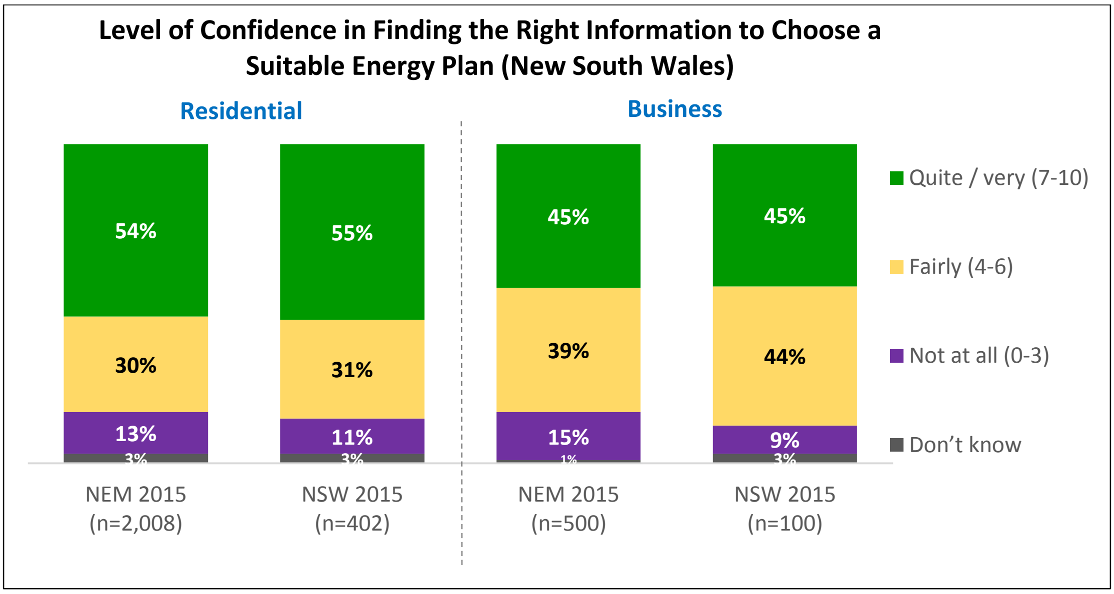


Base: Residential Respondents who had switched gas company or plan in the last five years (n=64). NB: Business results not shown due to small sample size (n=9)
Q52. And thinking about the information sources you used when changing your gas company or plan, which one was most useful in helping with your decision to switch?



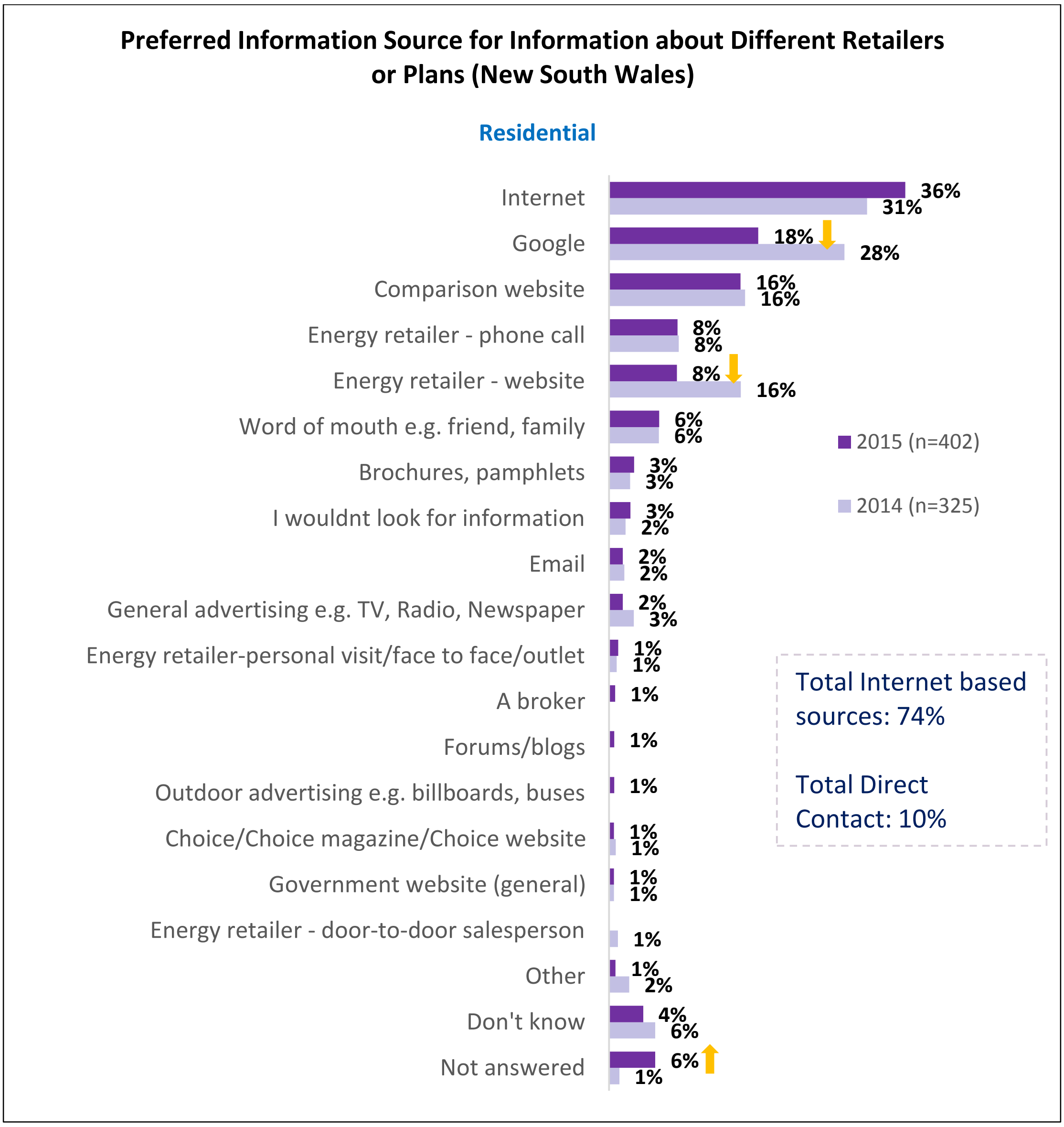
Base: Residential Respondents who had not switched company or plan in the past five years but had investigated different options in the last 12 months (n=39). NB: Business results not shown due to small sample size (n=4)
Q57. And thinking about the information sources you used when investigating different offers or options, which one was most useful in helping with your decision whether or not to switch?

__Adequacy of Information__

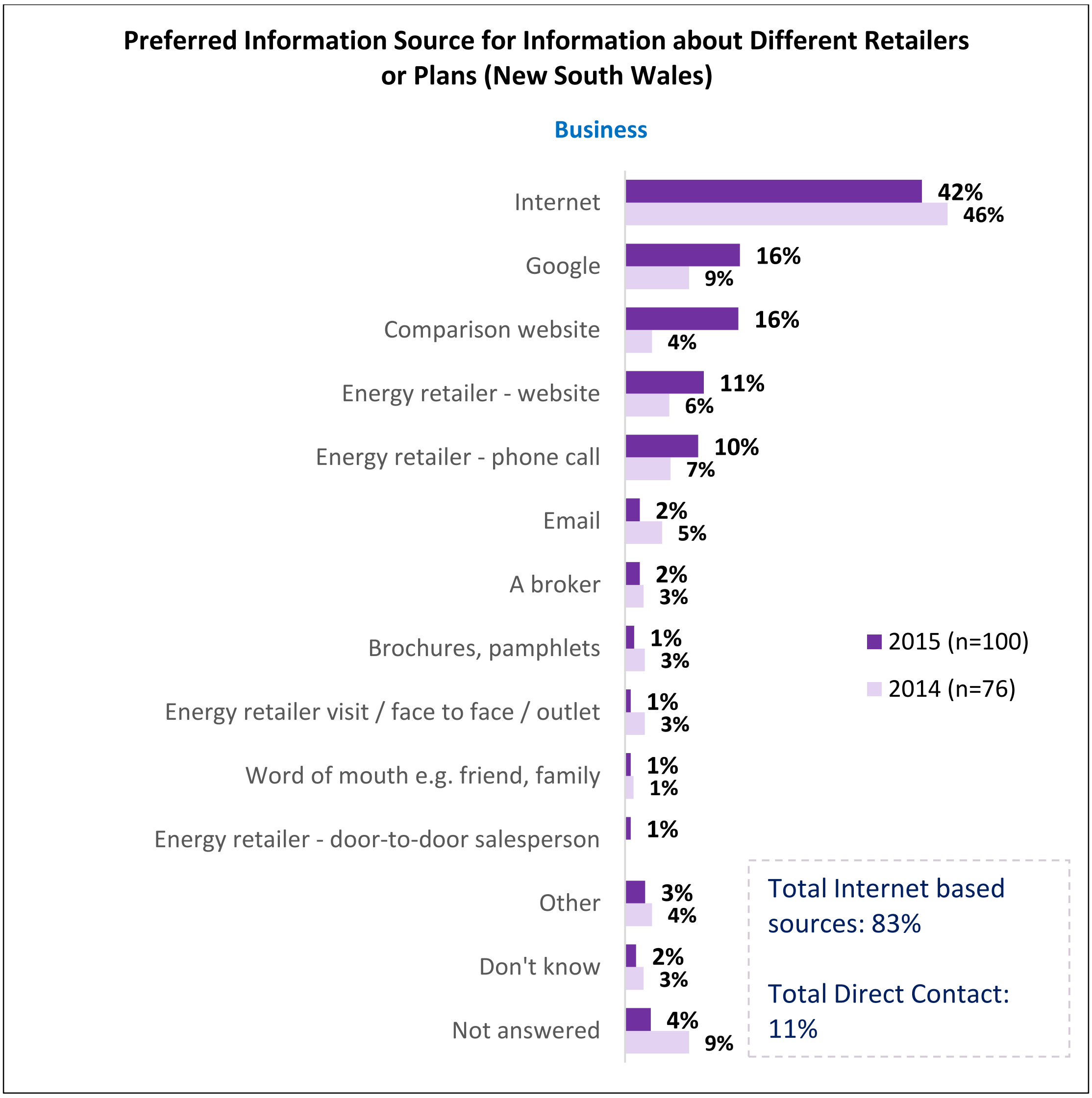


Base: All Respondents
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Preferred Information Sources

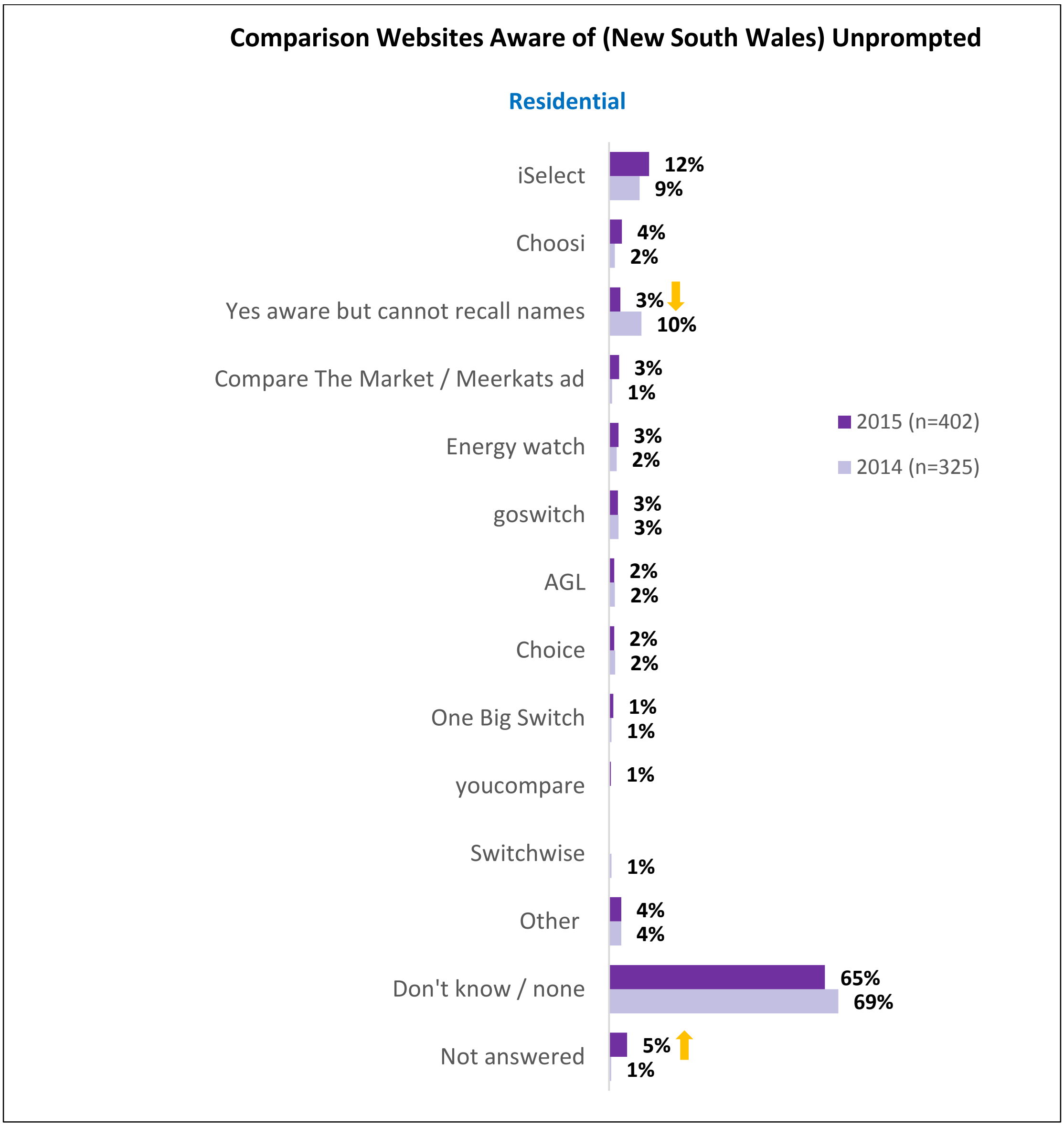


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

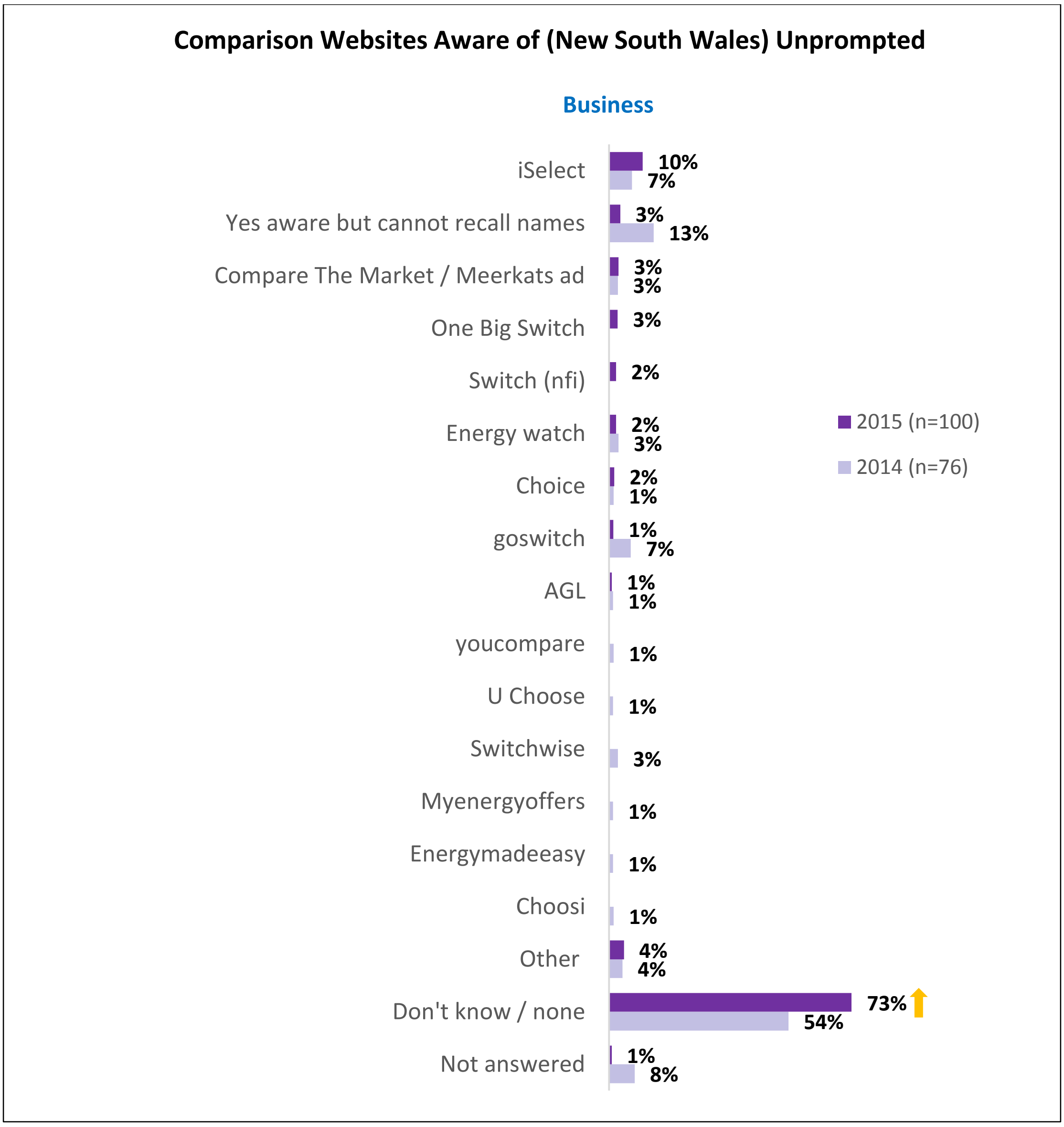


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

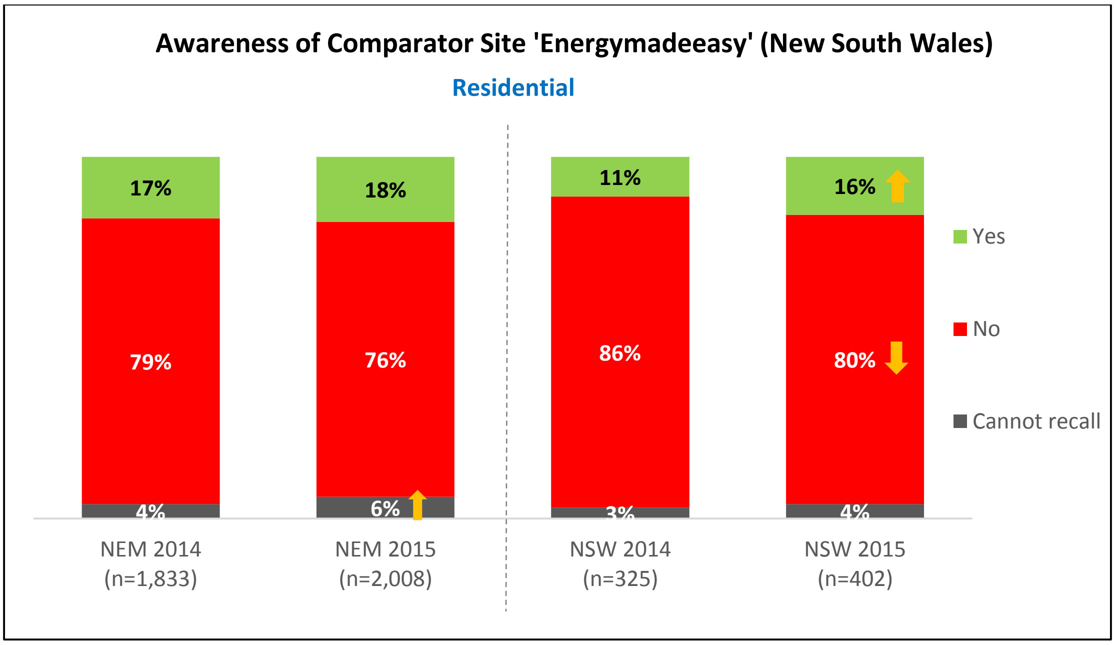
Awareness of Comparison Sites



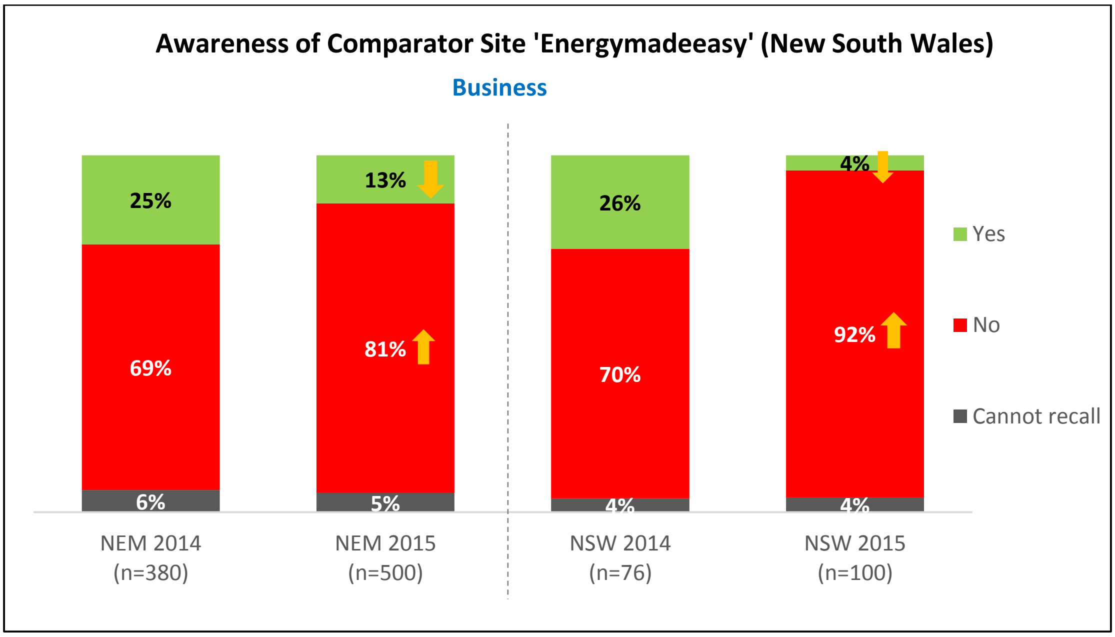
Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?

SOUTHEAST QUEENSLAND

NEWGATE RESEARCH

4. Southeast Queensland

Table of Contents

4.1 Executive Summary

Introduction

This chapter outlines Newgate Research's findings from quantitative research conducted among small energy consumers in southeast Queensland (SEQ) in February 2015.

The research involved a mix of telephone and online surveys with n=402 residential consumers and n=100 small business consumers. For the purposes of this survey, residential consumers were defined as the person in the household who is the main or joint decision maker when it comes to choosing their energy company. Small business consumers also had to be the main decision maker and in addition, their quarterly electricity bill needed to be less than $4,750. If they had mains connected gas the quarterly bill needed to be less than $6,000 in Brisbane and less than $4,500 in the rest of southeast Queensland.

The sample breakdowns by methodology and for age and gender are shown in the tables below. In addition to these, the sample also included n=69 residential consumers and n=10 small business consumers who had mains connected gas.

Respondent type by mode (n=)	Residential		Small Business	
	Metro	*Regional*	*Metro*	*Regional*
Online	202	100	-	-
Telephone	66	34	67	33
Total	**268**	**134**	**67**	**33**

Age/gender breakdown (residential n=)	Male	Female	Total
18-34	22	52	74
35-54	93	88	181
55+	72	75	147
Total	**187**	**215**	**402**

Further details about the methodology are provided in the Methodology section.

Throughout this chapter, statistically significant differences (95% confidence level) between the 2014 and 2015 results are noted using arrows (↑↓). Where there are differences between individual sub-groups, these are indicated using **red** (meaning significantly <u>lower</u> than other groups) or **blue** font (significantly <u>higher</u> than other groups).

Please note, throughout this chapter the results relating to gas for small business consumers are not shown due to a small sample size (n=10).

Key Findings

Awareness of being able to choose their company remained strong in southeast Queensland

Consistent with the NEM, most consumers in southeast Queensland were aware they could choose their energy company - 89% of residents and 95% of small business consumers knew they could choose their electricity company, 86% of residents knew they could choose their gas company.

Awareness of being able to choose from different plans was somewhat lower than awareness of being able to choose from different companies. Seven in ten residents (71%) and eight in ten small businesses (79%) were aware they could choose from different electricity plans and just 65% of residents were aware they could choose from different gas plans. This level of awareness was lower than the NEM average.

Consumers were fairly confident they could choose the right energy option for their home or business and results on this measure were fairly comparable with the NEM average.

Switching rates in southeast Queensland have declined

Just under half of the residents surveyed in southeast Queensland switched their electricity or gas company or plan in the past five years (47%) representing a significant decrease since 2014 (57%). This decrease in switching was also evident across the NEM and is most likely due to a decrease in approaches by energy companies in the past year (from 42% in 2014 to 28% in 2015).

Vulnerable customers were more likely to investigate their options but this did not translate to higher levels of switching. Further analysis shows these consumers are more cautious and find it harder to compare offers

Around one in four residents had actively investigated offers or options they could potentially switch to (25%) and this was significantly higher among those receiving a concession (33%), those on a payment arrangement as a result of financial hardship (46%) and those currently experiencing financial difficulty paying their electricity or gas bill (39%). Despite this, these higher levels of investigation did not necessarily translate into higher levels of switching over the past five years. When looking at attitudes towards switching, these types of consumers are more likely than others to be concerned about hidden fees and charges and to find it too complicated to compare the various options and offers available.

Price related factors remained the main reason for switching energy company or plan

Reasons for switching energy company or plan remained consistent, with cheaper prices and discounts most commonly mentioned. Consistent with other jurisdictions, when prompted with a range of factors that could be considered when deciding whether or not to switch, the discounts offered, the estimated total bill amount and the price per unit of energy were by far the most important factors.

A lack of value proposition and the perception that there are no other options available are the biggest barriers to switching

Consistent with 2014 the main reason given among residents who had investigated offers but not switched in the past 12 months was a lack of value proposition (36%) or because they believed there were no other options or alternatives available (13%). The proportion of consumers who mentioned they didn't switch because there were no options available was higher than in Victoria (0%), South Australia (2%) or New South Wales (6%).

Among consumers who had not investigated options or switched provider or plan, the main reasons given among residents was it would be too much time and effort (26%) or they were satisfied with their current retailer or arrangements (23%). These were also consistent with 2014.

Attitudes towards switching or investigating offers are in line with the NEM

There remained a fair level of interest in switching with one in ten consumers (12% residential, 9% small business) indicating they were currently looking for a better deal and four in ten residents (40%) and half of small businesses (52%) interested but not currently looking for a better deal.

Consumers in southeast Queensland were most likely to agree they would switch if they were not satisfied with their current company (77% residential, 85% small business) and that they were concerned that if they switched there would be hidden fees and charges (67% residential, 73% small business). They were least likely to agree that the amount of money they could potentially save was not worth the time and effort (40% residential, 42% small business) or they can't be bothered looking for a better deal (39% residential, 23% small business).

Satisfaction with the level of market choice in southeast Queensland was lower than the NEM average

Satisfaction with the level of market choice in southeast Queensland was consistent with 2014 and remained lower than the NEM average (48% of the NEM were very or somewhat satisfied vs. 56% among residents in southeast Queensland). It was also slightly lower among business consumers in southeast Queensland (40% vs. 47% across the NEM).

Satisfaction was higher among those who are receiving a rebate or concession

Southeast Queensland residents currently receiving a rebate or concession gave consistently higher ratings for satisfaction with the level of market choice (58% very or somewhat satisfied), satisfaction with current electricity provider (78% rating 7 or more), the overall quality of customer service (71%) and overall value for money (56%) compared to those not receiving a concession or rebate.

The internet remained the most popular information source

Internet based information sources continued to be the most used and preferred method or source of information to look for information about energy retailers and plans and investigate options. This was consistent among those who had switched electricity company or plan and those who had not.

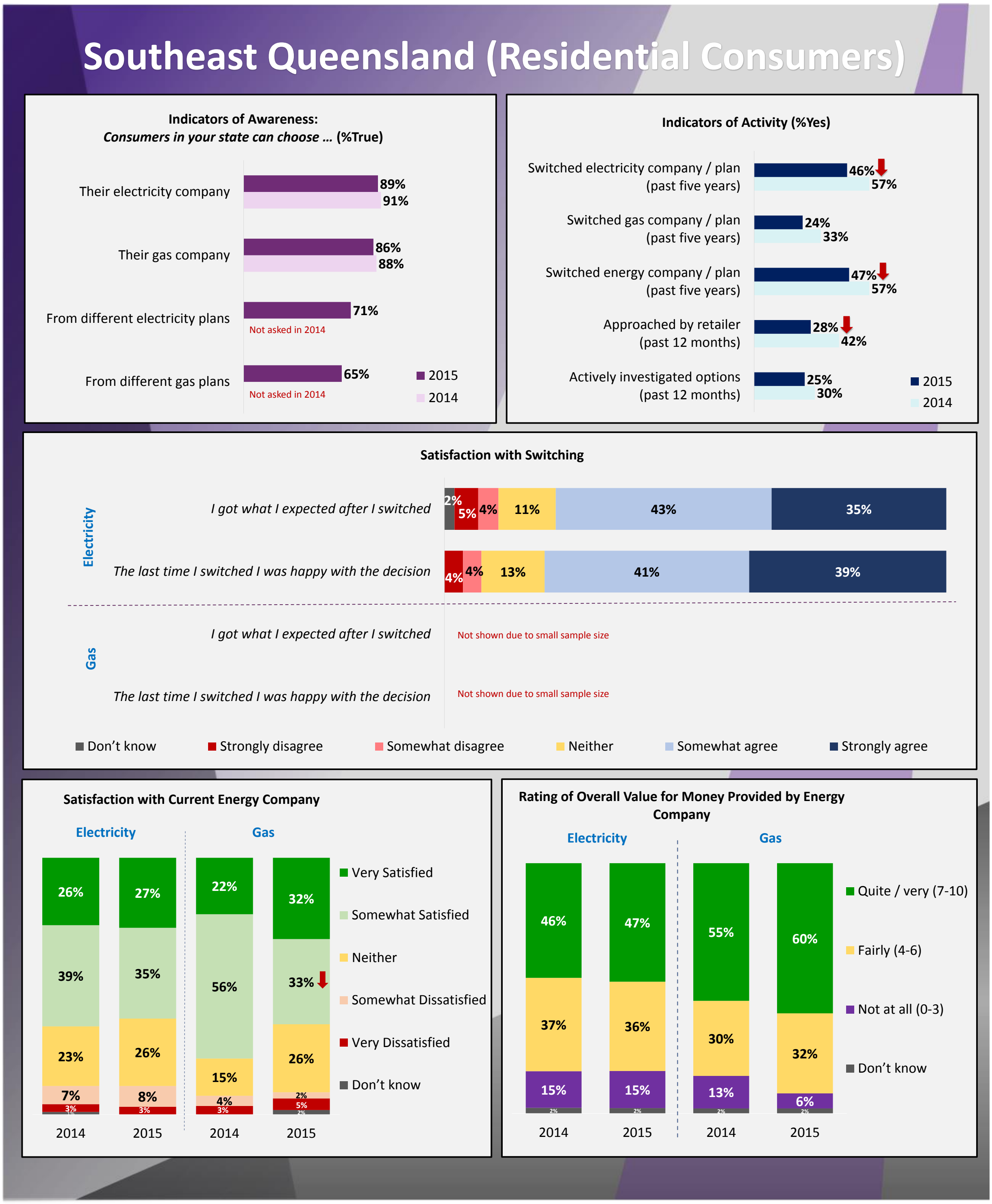
There were fair levels of confidence in being able to find the right information

When it came to confidence in finding the right information to choose a suitable energy plan, half of residential consumers (50%) and four in ten business consumers (43%) were quite or very confident (rating 7 or more out of 10).

Unprompted awareness of comparison websites remained quite low in 2015

Two thirds of consumers (70% residential, 76% small business) could not name any comparison sites at all and a further 3% of residents and 4% of small business consumers were aware there were comparison sites but could not recall any specific names. When prompted, around one in ten residents (14% up slightly from 12% in 2014) and less than one in ten of small business consumers (8%, down from 19% in 2014) could recall the QCA Price Comparator website.

Snapshot of Results



4.2 Key Findings in Detail

4.2.1 Customer Awareness & Understanding

Summary of Findings

Around nine in ten consumers were aware they could choose their electricity company (89% of residents, 95% of small businesses) or gas company (86% of residents). This was fairly consistent with 2014 and in line with the NEM average.

Awareness of being able to choose from different plans with different price structures, contract lengths and terms was somewhat lower than awareness of being able to choose their company. Around seven in ten residents (71%) and eight in ten small businesses (79%) were aware they could choose from different electricity plans. This was fairly comparable to 2014 where consumers were asked if they knew they could choose from a range of different energy plans – 74% of residents and 79% of small business consumers knew they could. Awareness in southeast Queensland was slightly lower than the NEM.

Further analysis showed that residential consumers in metro areas (76%) and those who had been approached by an energy company (85%) were significantly more likely to be aware that they could choose from different electricity plans. Just two thirds of residents (65%) were aware they could choose from a range different gas plans.

Despite there being 11 electricity brands operating in southeast Queensland, on average, residents thought there were just five electricity brands to choose from and small business consumers thought there were seven. On average, residents thought there were about four gas brands to choose from, despite there being only two. Although there were slight decreases in the average number of companies consumers thought they could choose from in 2015, these were not statistically significant.

Consumers in southeast Queensland were fairly confident they could choose the right energy option of offer for their home or business. Around half of residents (51%) and four in ten small business consumers (43%) were quite confident, giving a rating of seven or more out of ten.

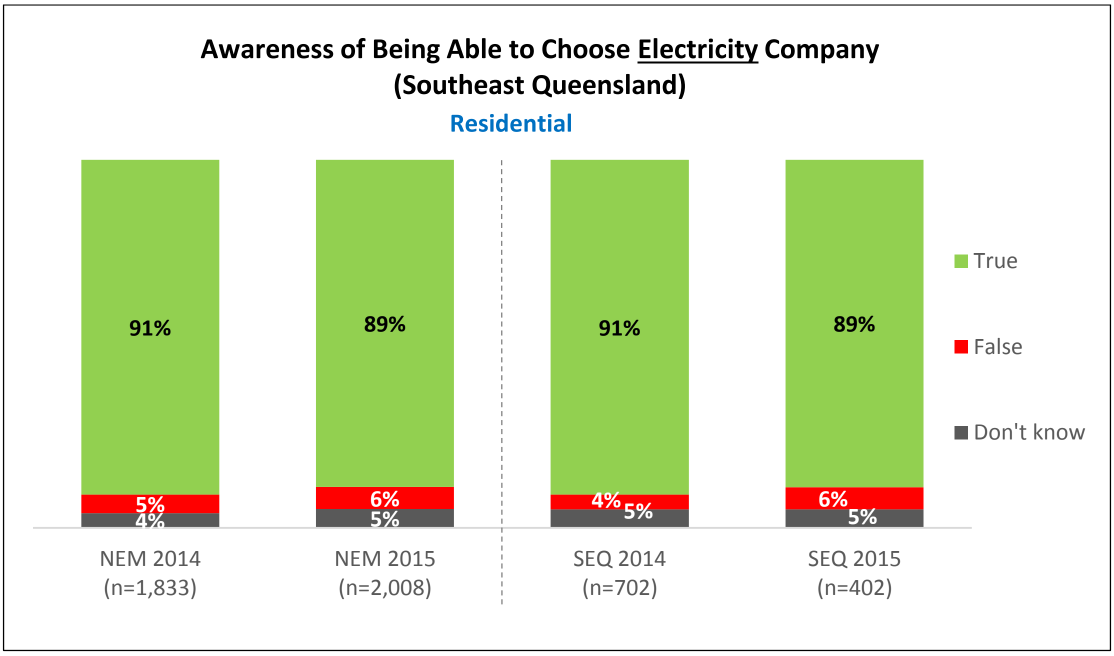
The following groups of residential consumers had significantly higher confidence levels:

- Those with mains connected gas;
- Those currently receiving a concession on their electricity or gas bill;
- Those on special payment arrangements as a result of financial hardship;
- Those with solar panels; and
- Those who had actively investigated offers in the past 12 months.

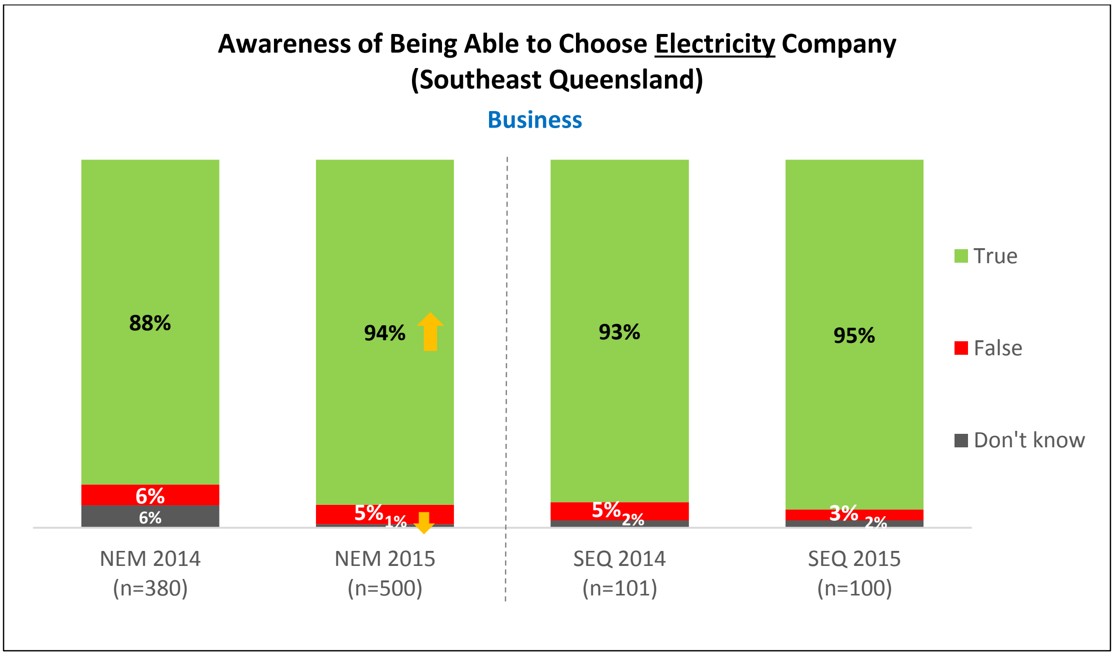
Confidence levels in southeast Queensland were fairly comparable with the NEM averages. Please note, direct comparisons have not been made with the 2014 results due to a change in the question wording.

It is also important to note that previous qualitative research conducted in 2014 actually shows that consumers tend to overstate their confidence when it comes to understanding the options and offers that are available for consumers to choose from. Many do not understand the difference between the various offers and very few know exactly how they are billed.

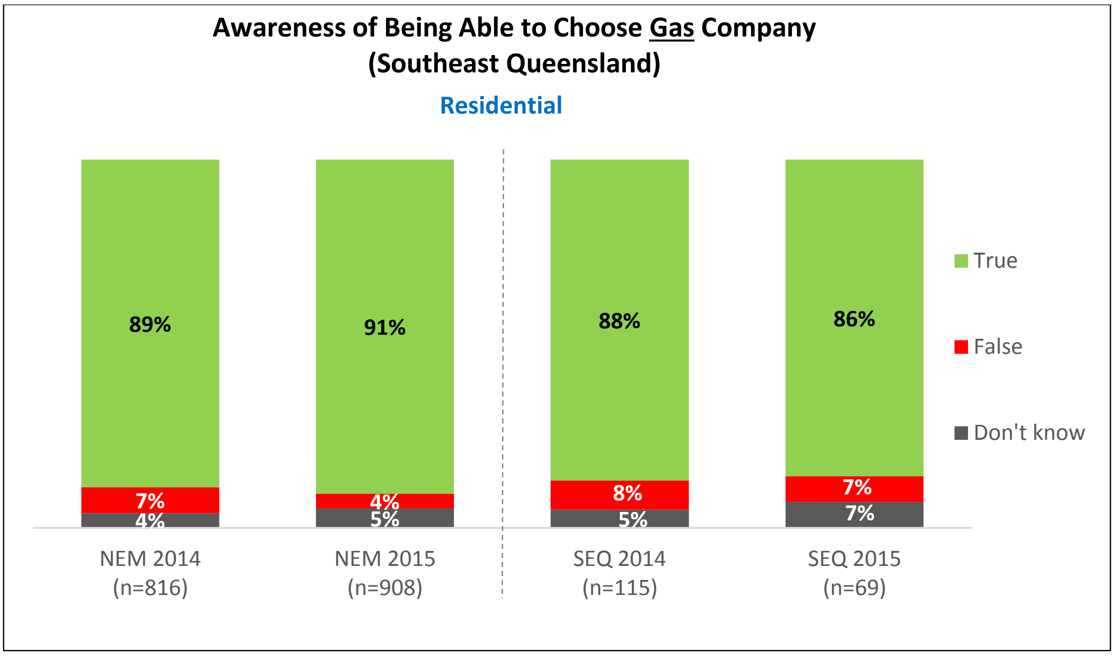
The Results



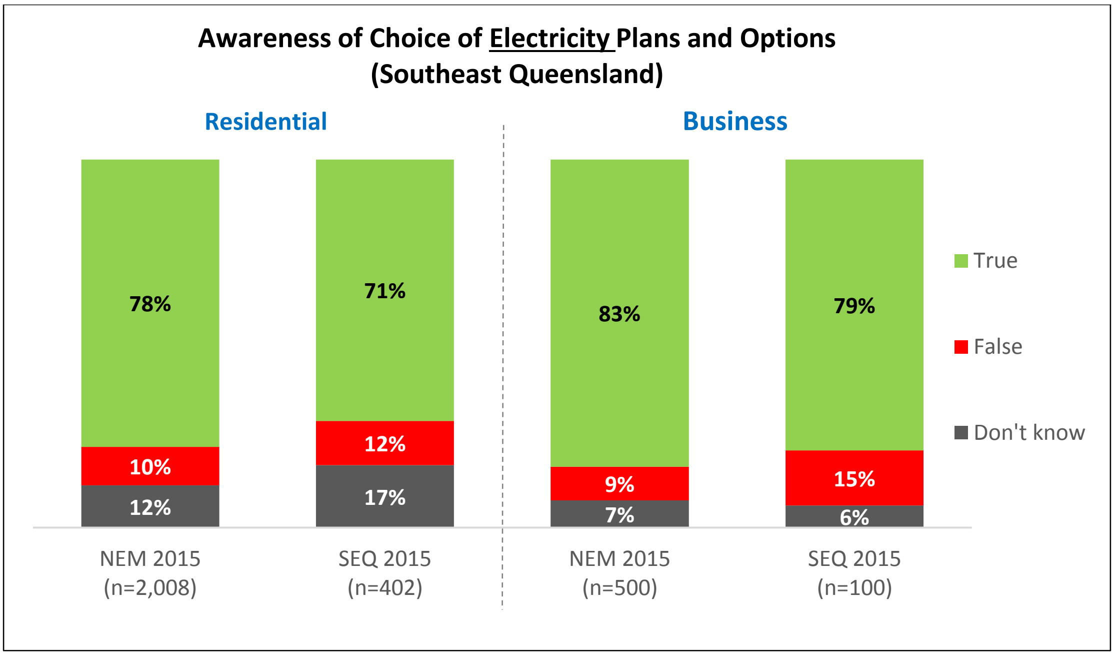
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



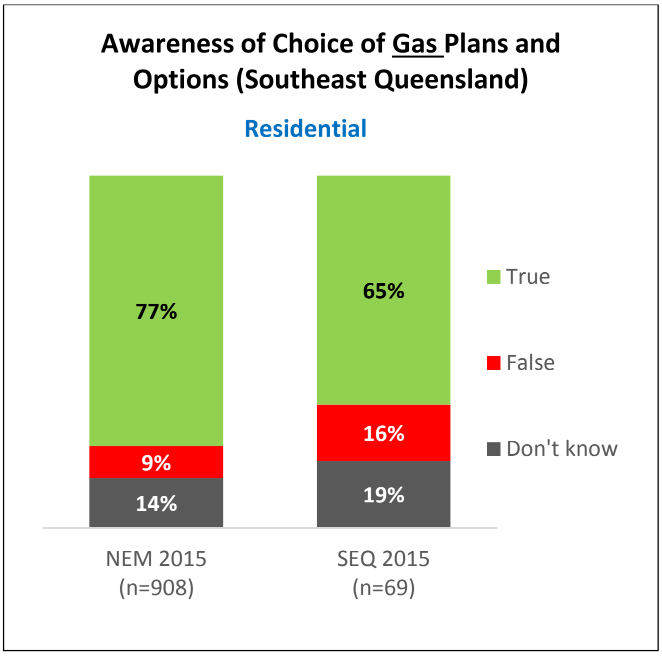
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



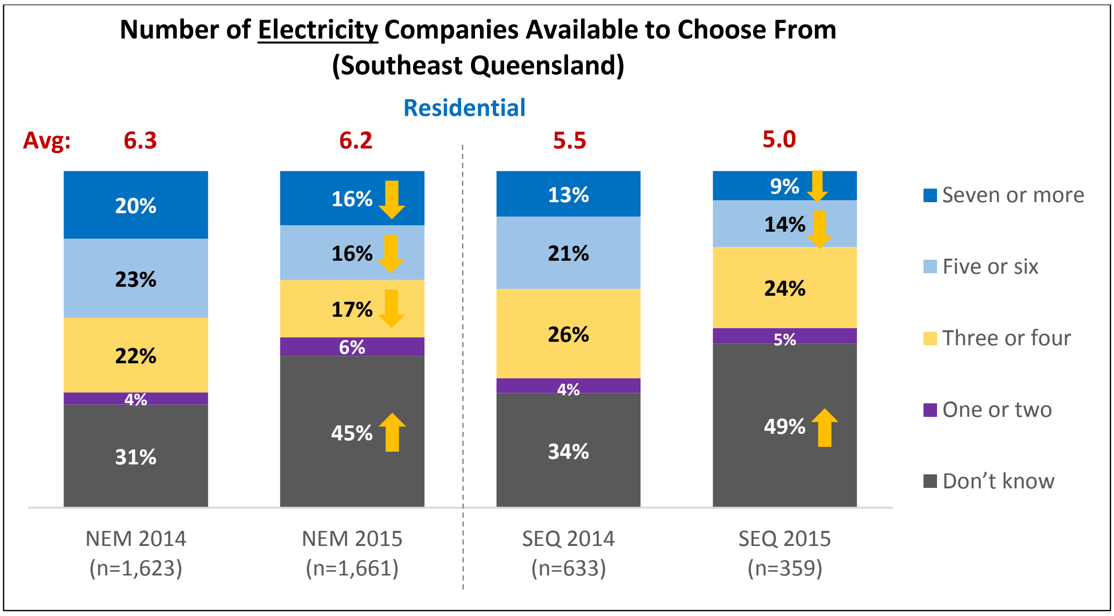
Base: Respondents with mains connected gas. NB: Small business consumer results not shown due to small sample size (n=9)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company



Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



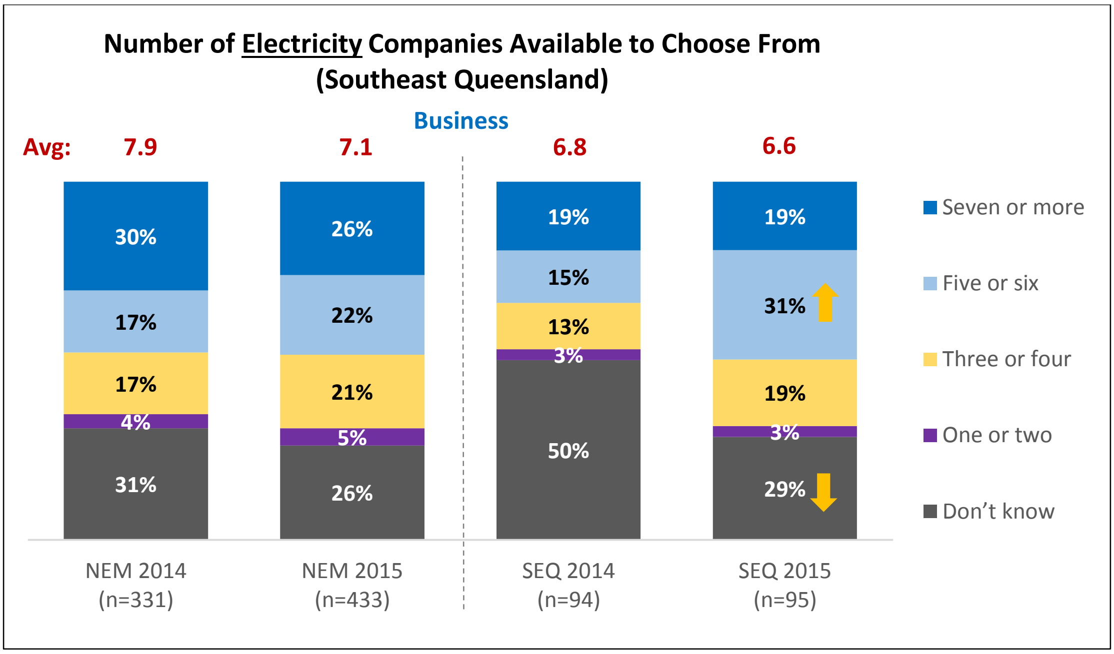
Base: Respondents with mains connected gas. NB: Small business consumer results not shown due to small sample size (n=9)
Q13. Please tell me whether you think the following statements are True or False. d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



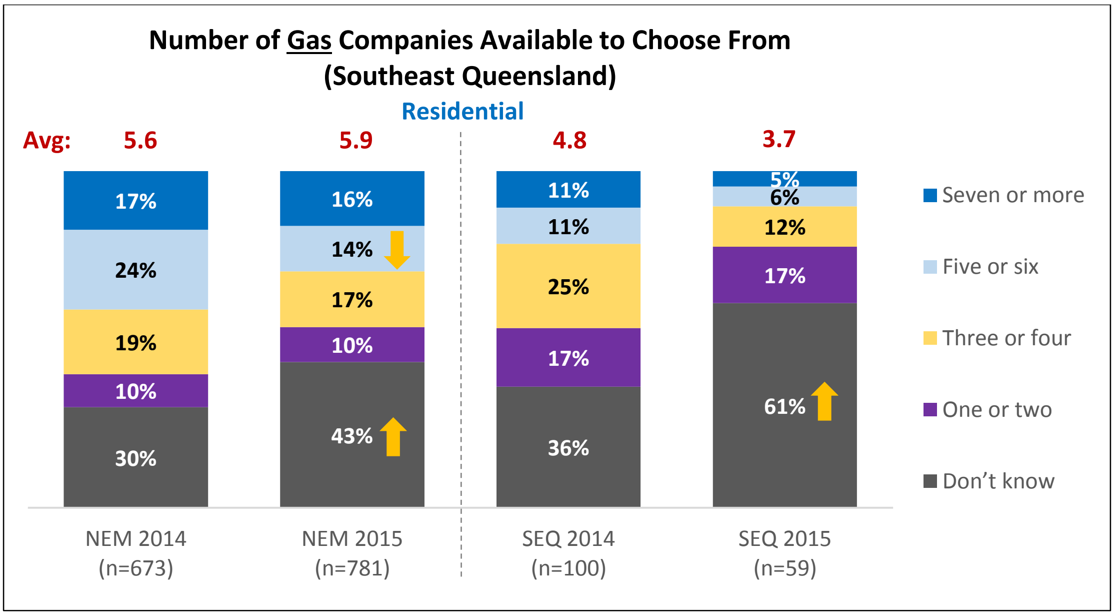
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?

Note that in 2015 there was an increase in the proportion of consumers who said they 'don't know' how many companies there are to choose from. This increase is likely to be a result of an increase in the number of surveys completed online. Analysis of the results by survey mode shows that the online survey results in 2015 were very consistent with 2014 and similarly the telephone survey results have remained consistent.

The increase in the proportion of 'don't know' responses does not affect the averages presented in the charts since they are excluded from the calculation of the average. As such, the 2015 averages are directly comparable with the 2014 results.



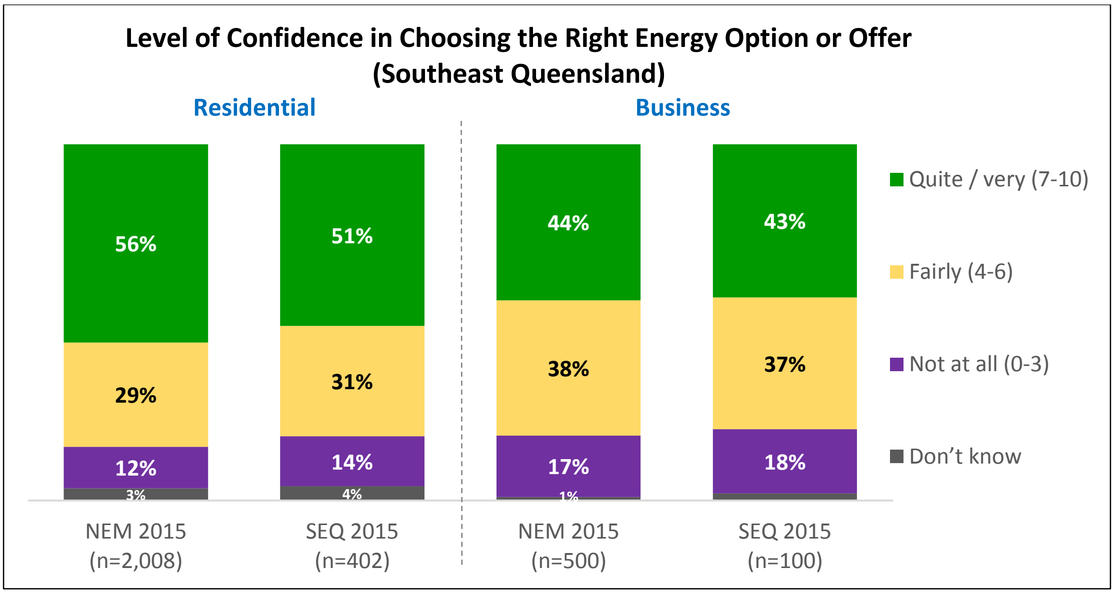
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: Respondents who say they can choose their gas company. NB: Small business consumer results not shown due to small sample size (n=6)
Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory?

Note that in 2015 there was an increase in the proportion of consumers who said they 'don't know' how many companies there are to choose from. This increase is likely to be a result of an increase in the number of surveys completed online. Analysis of the results by survey mode shows that the online survey results in 2015 were very consistent with 2014 and similarly the telephone survey results have remained consistent.

The increase in the proportion of 'don't know' responses does not affect the averages presented in the charts since they are excluded from the calculation of the average. As such, the 2015 averages are directly comparable with the 2014 results.



Base: All Respondents
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

4.2.2 Market Participation

Summary of Findings

Incidence of Switching or Investigating Offers

Consistent with the 2014 survey, consumers were asked if how many times they had switched their electricity or gas company or plan in the past five years. To allow more granular tracking in future, those who had switched at least once in the past five years were also asked how many times they switched in the past 12 months.

In southeast Queensland one in five residential consumers had changed their electricity company or plan in the past 12 months (19% with 18% changing their electricity company or plan and 28% changing their gas company or plan). Three in small business consumers switched their electricity company or plan in the past 12 months (29%).

Just under half of the residents surveyed in southeast Queensland had switched their electricity or gas company or plan in the past five years (47%). This represents a significant decrease since 2014 (57%) and was consistent with an overall decrease across the NEM. This decline is most likely due to a decrease in approaches by energy companies (from 42% in 2014 to 28% in 2015).

Further analysis shows that those more likely to have switched in the last five years included residential consumers living in metropolitan areas (51%), those who had been approached by an energy company offering to sell them electricity or gas (65%) and those who actively investigated their options (66%). Those with a lower household income (37%) were significantly less likely to have switched.

The following types of residential consumers were significantly more likely to have been approached by an energy company in the past 12 months:

- Those living in metropolitan areas;
- Those with mains connected gas;
- Those on a payment arrangement as a result of financial hardship; and
- Those currently experiencing financial difficulty paying their electricity or gas bill.

Although not statistically significant, switching rates among small business consumers have increased slightly this year, with 62% having switched their electricity company or plan in 2015 (up from 50% in 2014).

There was a slight decline in the proportion of residential consumers who actively investigated offers or options they could potentially switch to (25% down from 30% in 2014). By contrast, there was a considerable increase in investigation rates among small business consumers (38% up from 27% in 2014 – although not statistically significant). This is an interesting finding given that there was an overall decline at the NEM level.

The following types of residential consumers were significantly more likely to have actively investigated different options or offers:

- Those living in metropolitan areas;
- Those with mains connected gas;
- Those with solar panels;
- Those currently receiving a concession on their electricity or gas bill;
- Those on a payment arrangement as a result of financial hardship; and
- Those currently experiencing financial difficulty paying their electricity or gas bill.

Motivations for Switching

The reasons for switching energy company or plan were very consistent with those mentioned in 2014. Cheaper prices, discounts and incentives were by far the biggest reported motivations to switching (63% of residents and 67% of small business consumers switched for these reasons).

Lower level drivers of switching included moving house / business premises (12% of residents, 11% of small business consumers) or due to the poor service received by the previous company (8% of residents, 11% of small business consumers).

When prompted with a range of factors that were considered during a decision whether or not to switch, respondents said the most important were the estimated total bill amount, the discounts offered and the price per unit of energy. The availability of green energy plans was much lower on the list of priorities.

The relative importance of these factors was consistent between residential and small business consumers and was very consistent with other NEM jurisdictions. For consumers with solar panels, the solar feed-in tariff was the top priority (52% rated the importance of this as 10 out of 10, 33% rated 8 or 9 out of 10).

Satisfaction with Switching

A large majority of consumers who had switched their energy company or plan agreed that they were happy with their decision to switch (80% of residents and 69% of small business consumers) and that they got what they expected after they switched (78% of residents and 67% of small business consumers).

Those who were happy with their decision to switch were most likely to feel that way as a result of the savings, discounts or incentives they received (71% of residents, 77% of small business consumers).

Despite most being satisfied with their decision to switch, only around half of those who switched agreed that they would recommend switching to their family, friends or colleagues (52% of residents, 48% of small business consumers). Consumers who agreed they got what they expected when they switched their electricity company or plan and who were happy with the decision were significantly more likely to advocate switching (64% and 63% respectively) compared to those who were not as happy with the outcomes (8% and 9% respectively). Similarly, those who were satisfied with their current electricity company (78%) were more likely to recommend switching than those who were not satisfied (32%).

When it came to the ease of comparing offers when deciding whether or not to switch, around six in ten residential consumers (61%) and half of the small business consumers (51%) found it fairly or very easy to compare electricity offers. However, compared with ease of comparing offers for a range of other services including home, car or health insurance, banking or communications, electricity was ranked lowest.

Barriers to Investigating Offers or Switching

The main reason given among residents who had investigated offers but not switched in the past 12 months was a lack of value proposition (36%). Lower level reasons given were thinking there were no other options or alternatives available (13%) or feeling it would take too much time and effort (8%).

Among residential consumers who had not investigated options or switched provider or plan, the main reasons given were that it would take too much time and effort (26%) or they were satisfied with their current retailer or arrangements (23%).

These barriers were fairly consistent with those mentioned in 2014.

Switching Intentions and Attitudes

When asked about their current intentions in relation to switching:

- Around one in ten consumers (12% residential, 9% small business) indicated they were currently looking for a better deal;
- Around four in ten residents (40%) and half of the small business consumers surveyed (52%) were interested but not currently looking;
- Around one in ten consumers (8% residential and 13% small business) had recently switched and were not interested in looking for a while; and
- A third of residents (33%) and one in five small business consumers (19%) were not interested in switching at all.

The residential results were fairly consistent with the NEM average, however small business consumers in southeast Queensland were more likely to be interested but not currently looking.

The following types of residential consumers were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal:

- Those with mains connected gas;
- Those under the age of 55;
- Those with a medium to high household income;
- Those who had previously switched in the past five years;
- Those on a special payment arrangement as a result of financial hardship;
- Those currently experiencing financial difficulty paying their electricity or gas bill; and
- Those with higher electricity bills.

In order to seriously consider switching their company or plan, residents wanted to save an average saving of $230 per year on their electricity bill and $144 on their gas bill. Small business consumers wanted to save about $627 on their electricity bill in order to consider switching. Those with higher energy bills wanted to see a bigger saving before they considered switching. Residents who agreed that the amount they could potentially save was not worth the effort (average saving amount needed $251) wanted to see significantly higher savings than those who disagreed it was not worth the effort ($198).

Attitudes towards switching and investigating offers in southeast Queensland were fairly in line with those found in other NEM jurisdictions. The strongest agreement levels were evident for the statements: *I would switch my energy company if I was not satisfied with my current company* (77% residential, 85% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (67% residential, 73% small business).

Further analysis showed the following attitudinal differences among residential consumers:

- Those who had switched in the past five years were significantly less likely to agree that the amount they could potentially save is not worth the time and effort involved or that they couldn't be bothered looking for a better deal;
- Those currently receiving a concession on their electricity or gas bill were significantly more likely to agree that the amount they could potentially save is not worth the time and effort involved; and
- Those who were currently experiencing financial difficulty paying their energy bill were more likely to be concerned about hidden fees and to agree that it too complicated to compare the various options and offers available.

Vulnerable Consumers

While vulnerable customers were more likely to have actively investigated their options and are more interested in seeking out a better deal, this has not necessarily translated to higher switching rates among this group. Analysis of the attitudes shows that this group tends to be more cautious about hidden fees and charges and may find it more difficult to compare the options and offers available.

The Results

In the Last Five Years

Provider (% switched at least once)	Residential			
	NEM		Southeast Queensland	
	2014 (n=1,833)	2015 (n=2,008)	2014 (n=702)	2015 (n=402)
Electricity Company	48%	39% ↓	44%	36% ↓
Electricity Plan	39%	31% ↓	31%	25% ↓
TOTAL Electricity	**60%**	**50% ↓**	**57%**	**46% ↓**
Gas Company	40%	35% ↓	27%	22%
Gas Plan	30%	24% ↓	21%	17%
TOTAL Gas	**49%**	**40% ↓**	**33%**	**24%**
TOTAL Electricity or Gas	**61%**	**51% ↓**	**57%**	**47% ↓**
Car Insurance	37%	35%	39%	39%
Mobile	32%	31%	34%	29%
Internet	30%	29%	32%	32%
Home Insurance	22%	26% ↑	27%	31%
Home Phone	22%	20%	26%	22%
Banking	18%	19%	19%	21%
Health Insurance	13%	16%	14%	15%

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

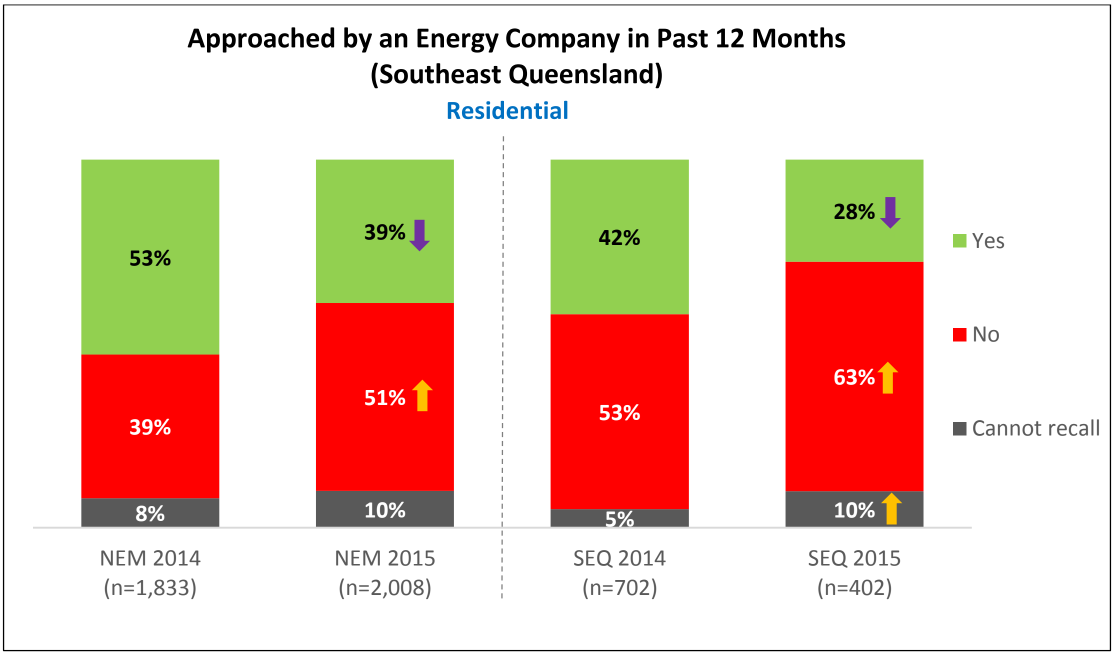
Provider (% switched at least once)	Business			
	NEM		Southeast Queensland	
	2014 (n=380)	2015 (n=500)	2014 (n=101)	2015 (n=100)
Electricity Company	47%	44%	43%	50%
Electricity Plan	39%	33%	34%	43%
TOTAL Electricity	**56%**	**55%**	**50%**	**62%**
Gas Company	46%	19%	Not shown due to small sample size (n=9)	
Gas Plan	50%	16%		
TOTAL Gas	**56%**	**23%**		
TOTAL Electricity or Gas	**57%**	**56%**		

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?

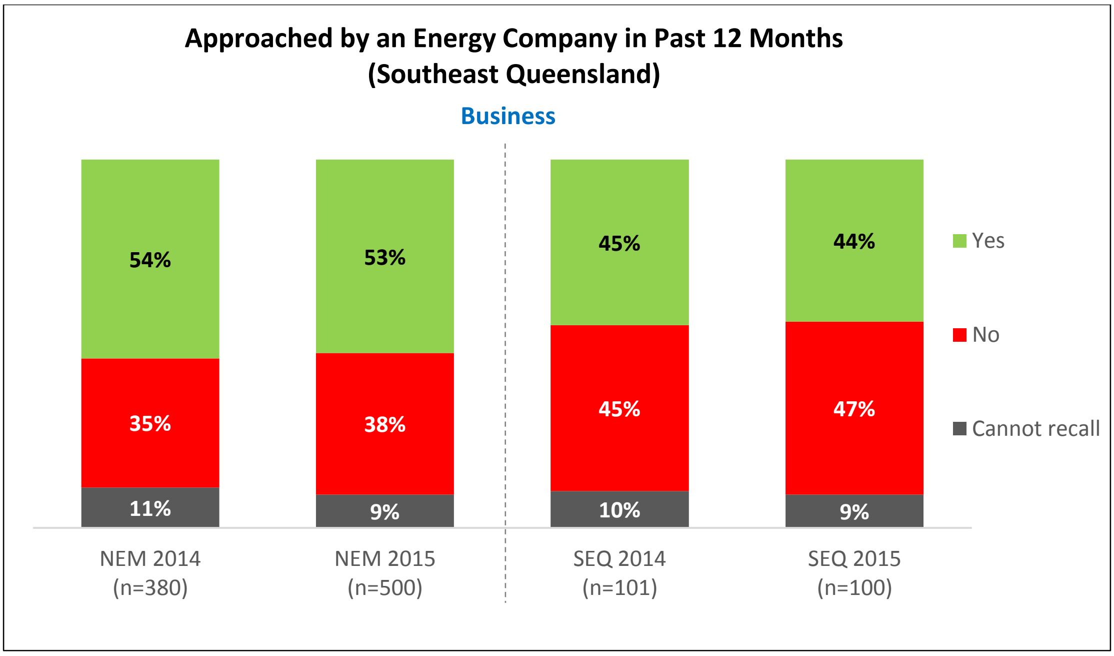
In the last 12 months

Provider (% switched at least once)	Residential		Business	
	NEM (n=2,008)	**Southeast Queensland (n=402)**	**NEM (n=500)**	**Southeast Queensland (n=100)**
Electricity Company	14%	11%	18%	15%
Electricity Plan	16%	12%	17%	21%
TOTAL Electricity	**22%**	**18%**	**28%**	**29%**
Gas Company	17%	12%	Not shown due to small sample size (n=9)	
Gas Plan	14%	9%		
TOTAL Gas	**21%**	**13%**		
TOTAL Electricity or Gas	**23%**	**19%**		

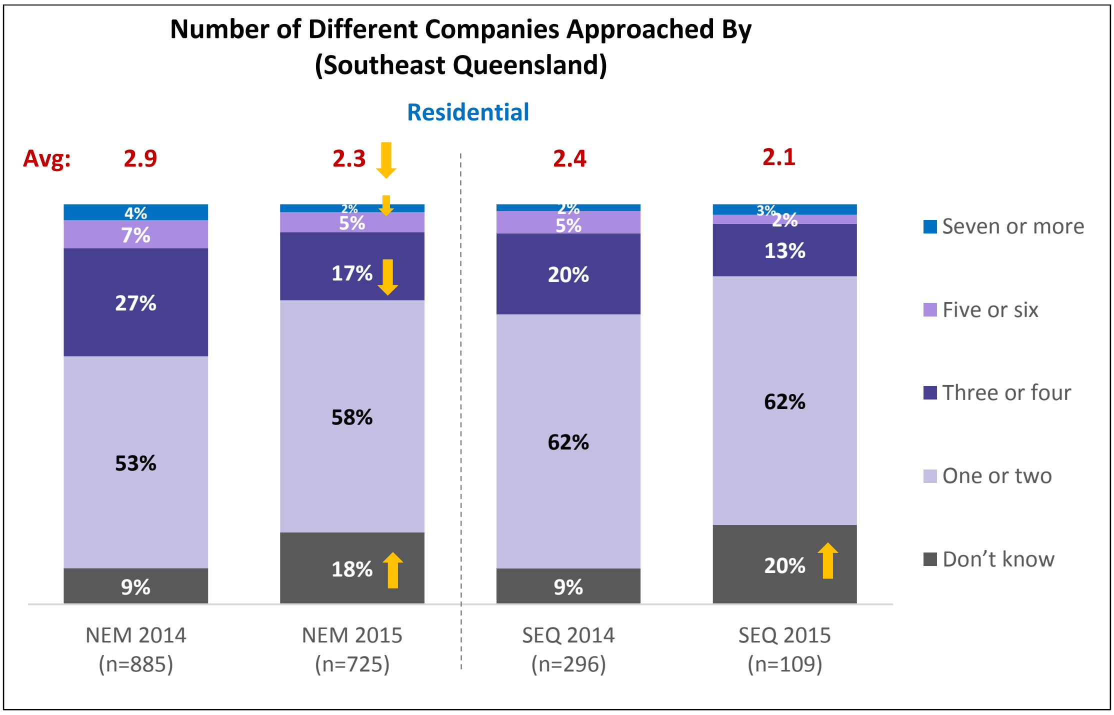
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?



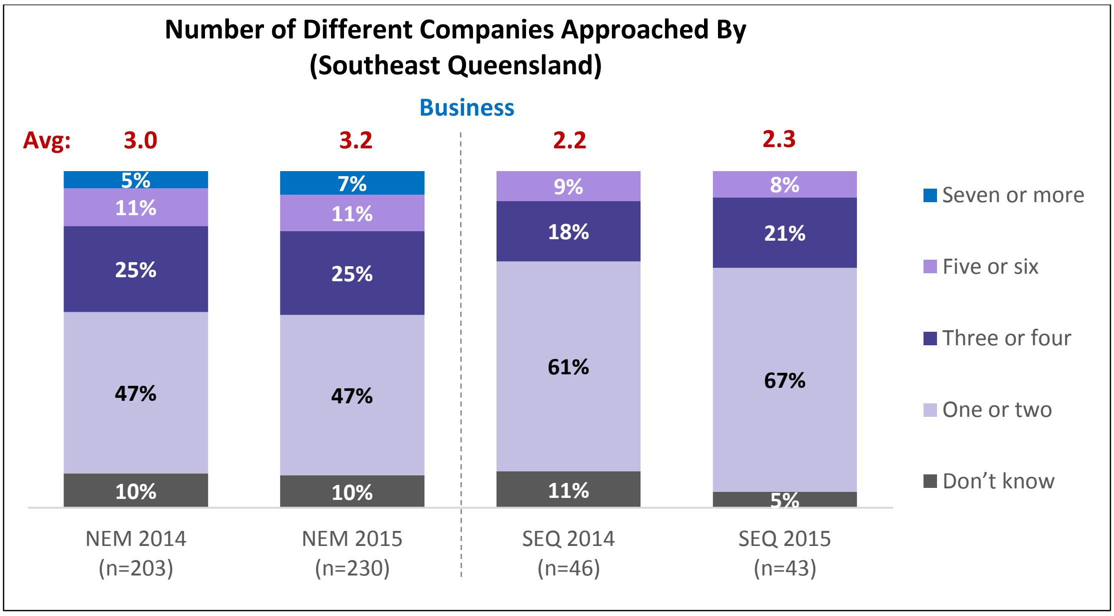
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



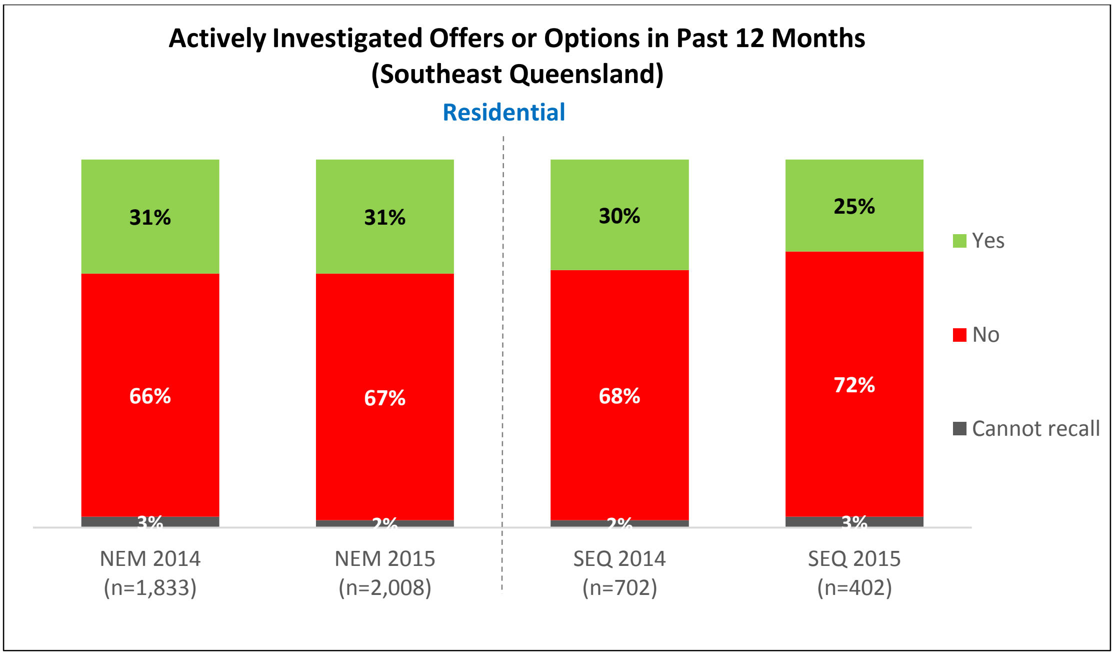
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



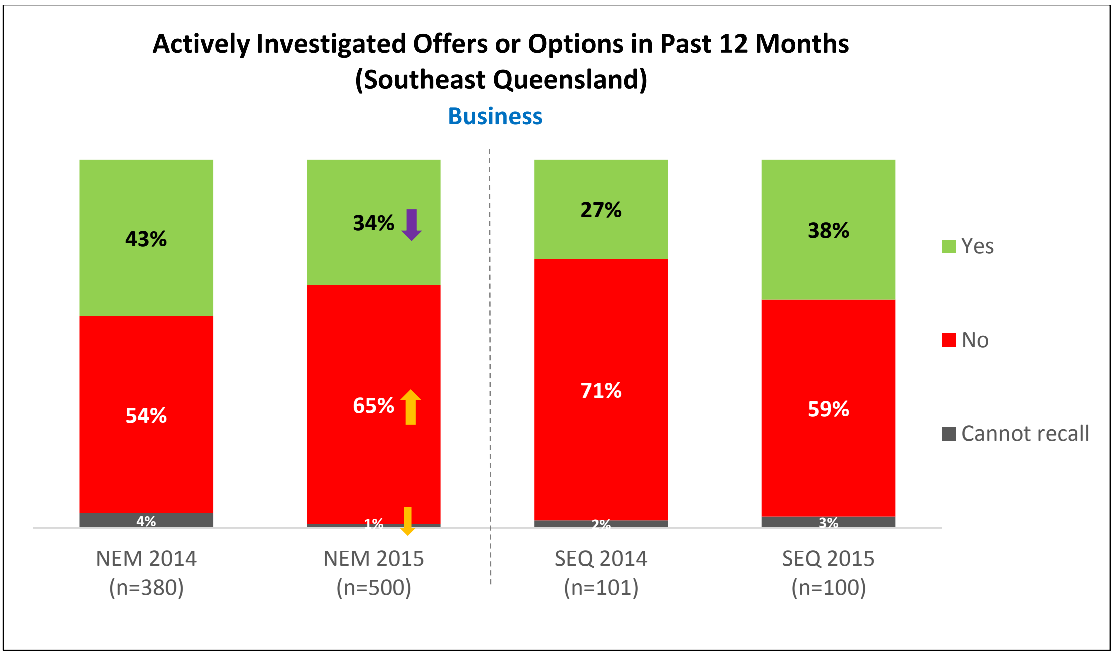
Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?



Base: Respondents who had been approached by an energy company in the past 12 months
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?

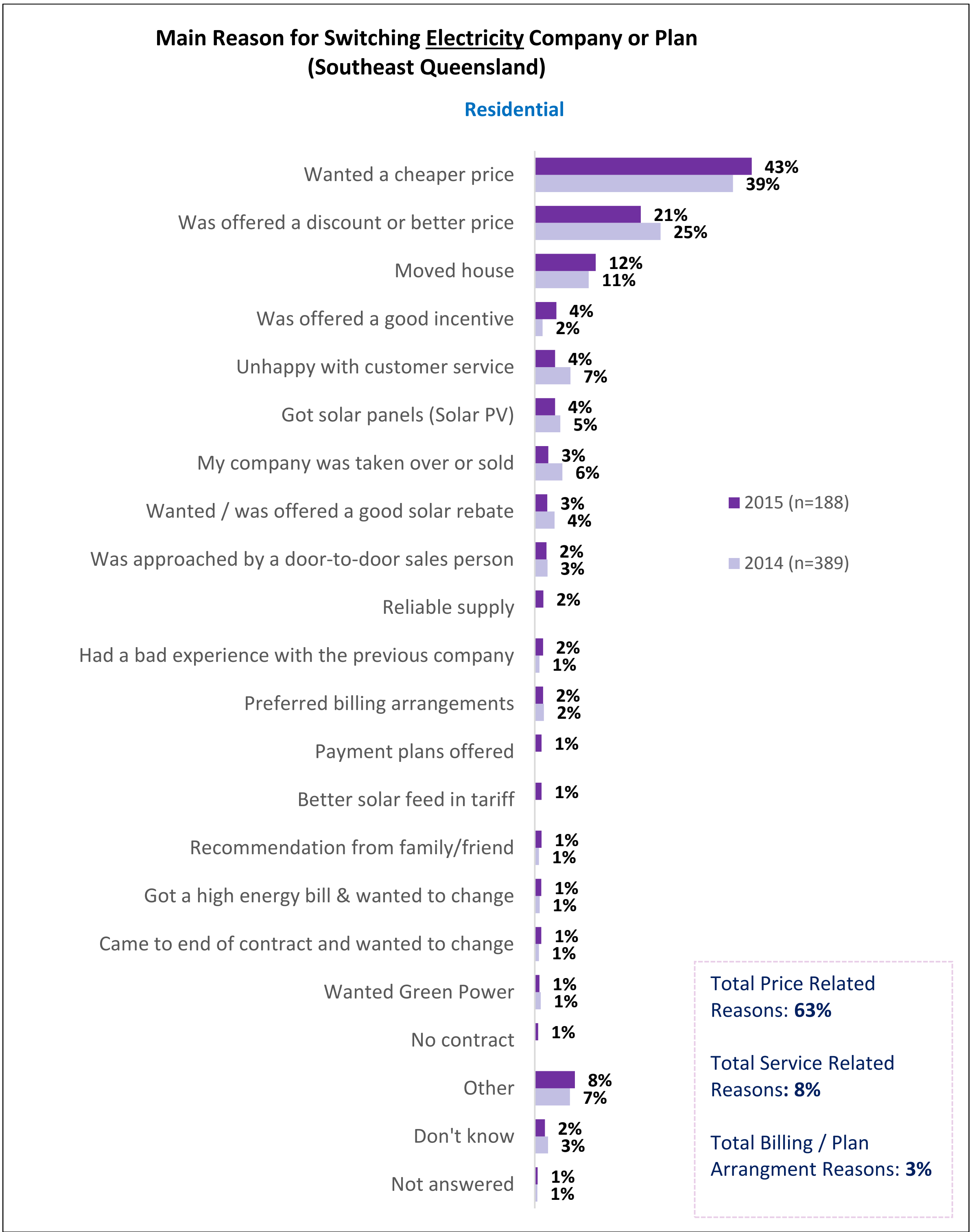


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

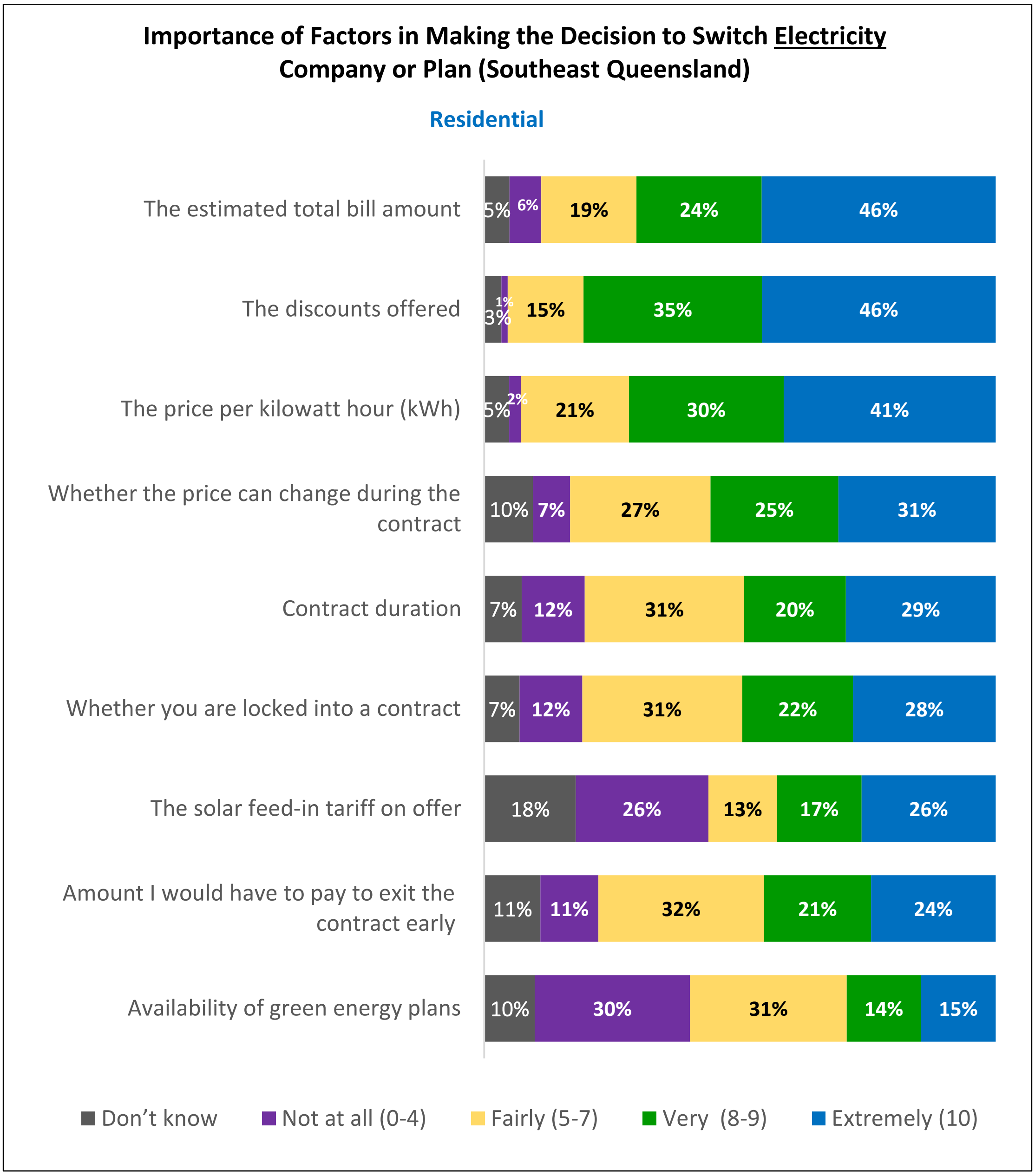


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

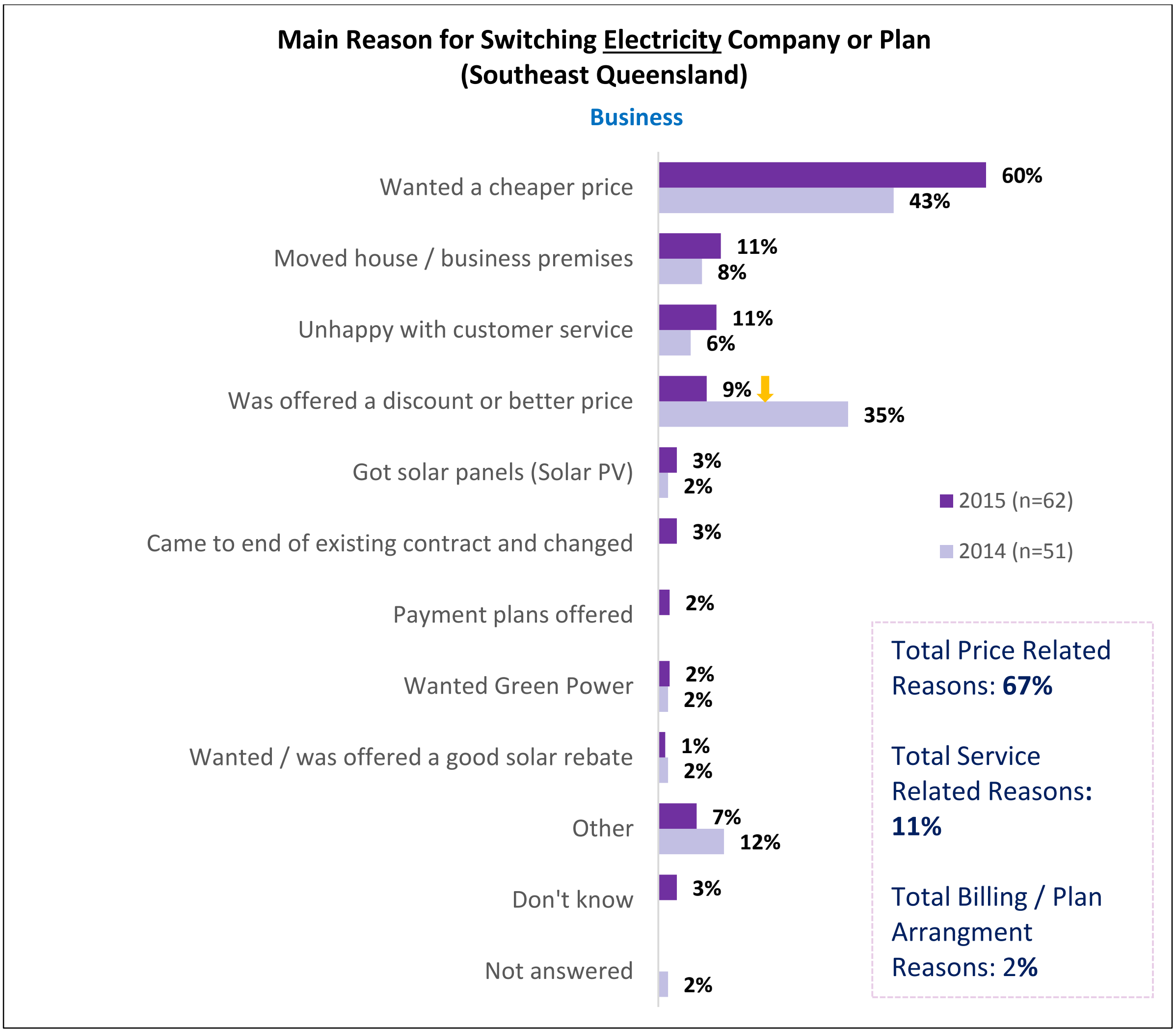
Motivations for Switching



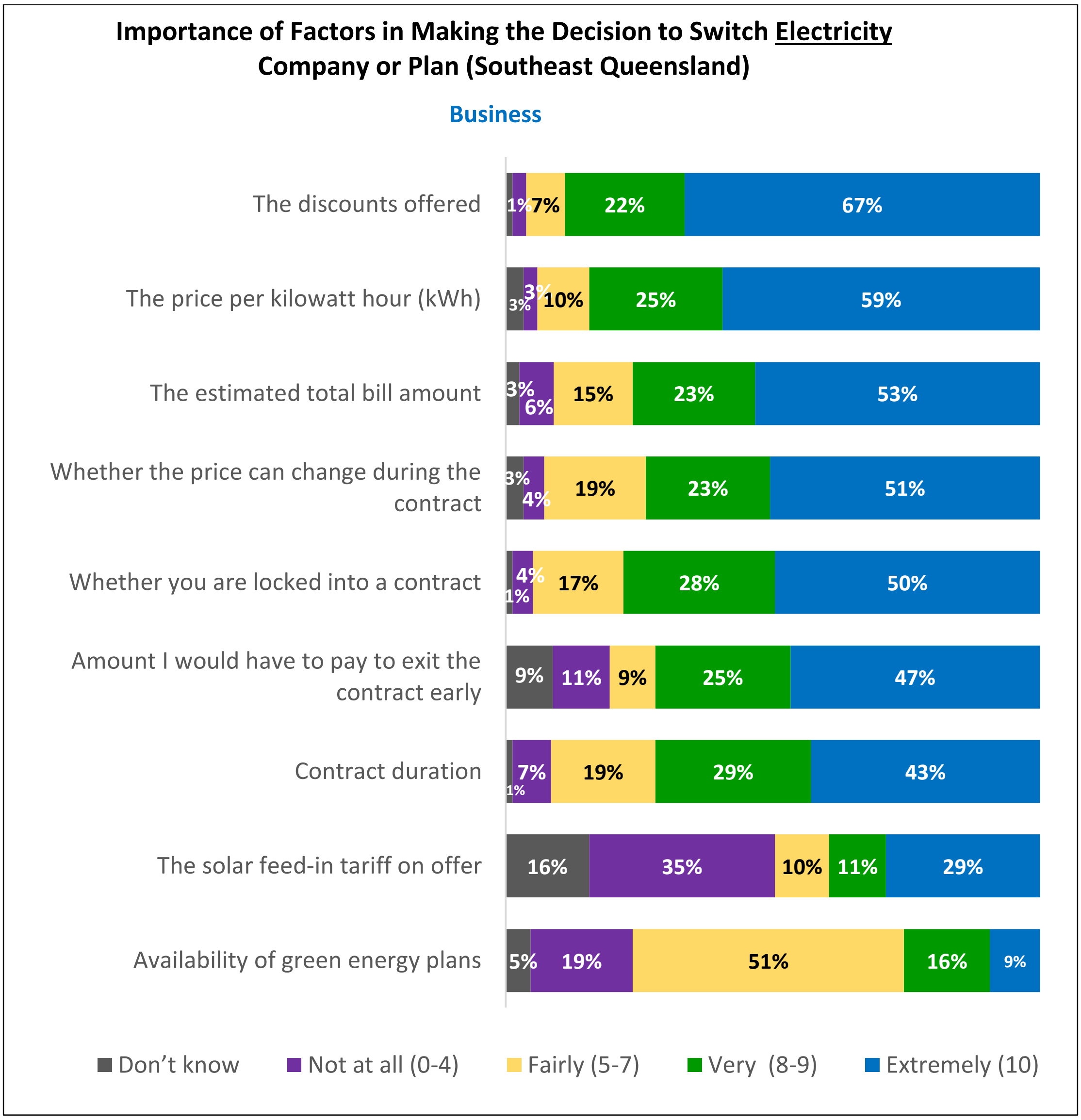
Base: Respondents who switched their electricity company or plan. NB: Gas results not shown due to small sample size (n=15)
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



Base: Respondents who switched their electricity company or plan (Residential n=188)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?

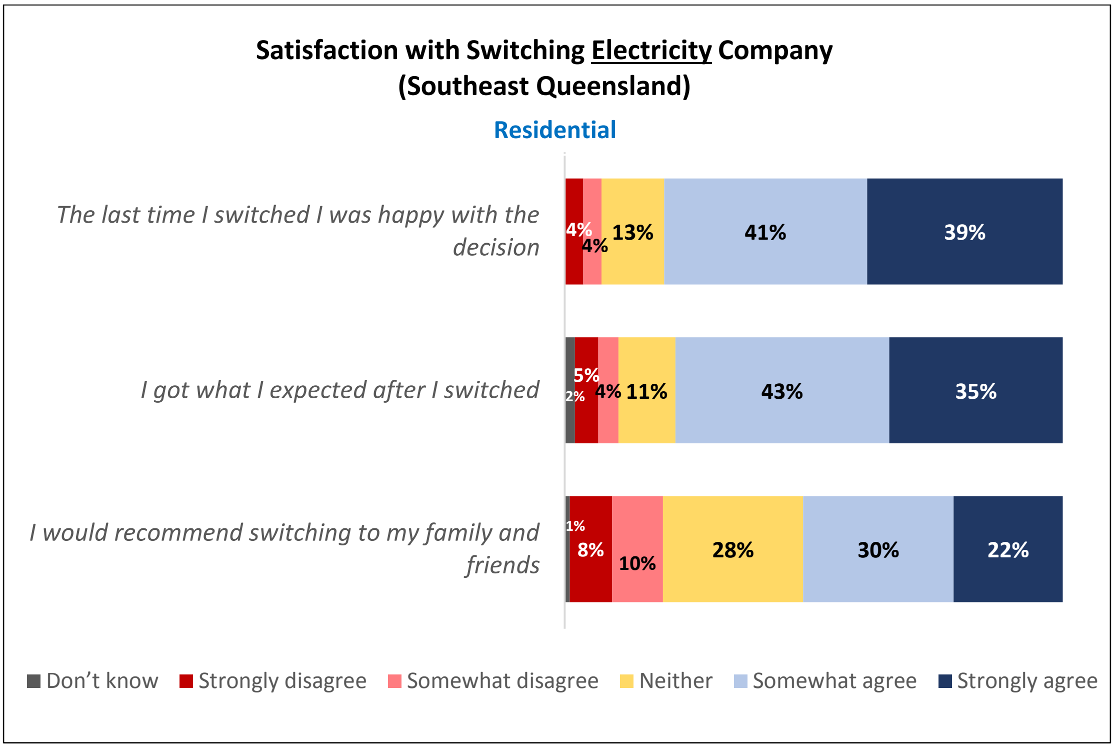


Base: Respondents who switched their electricity company or plan. NB: Gas results not shown due to small sample size (n=1)
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE

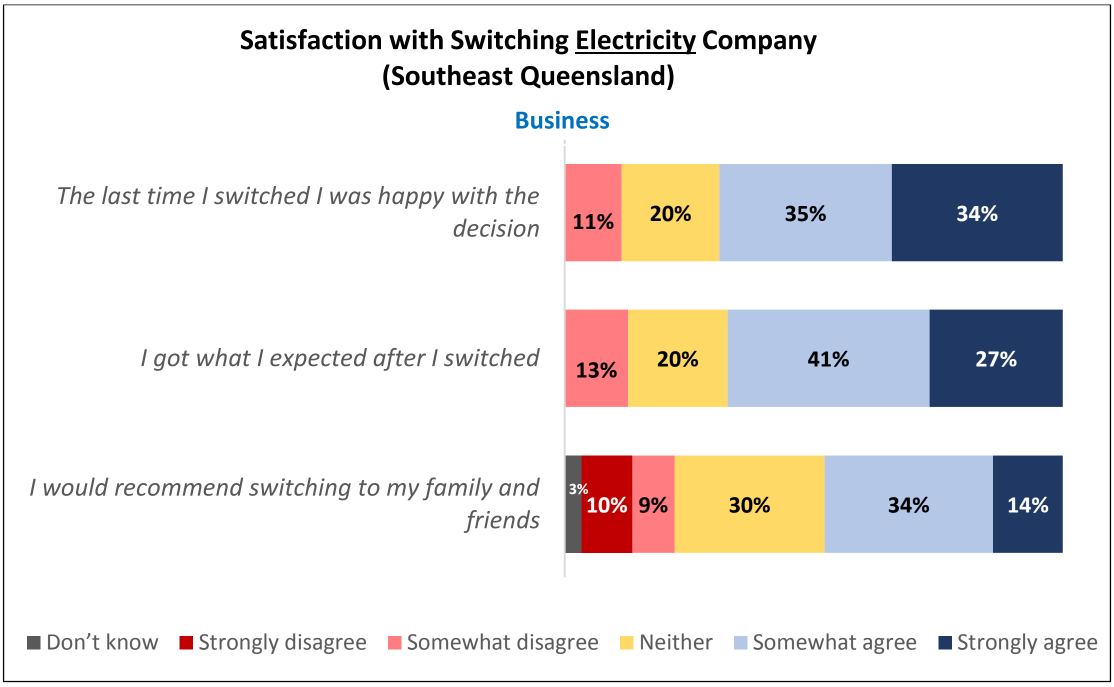


Base: Respondents who switched their electricity company or plan (Business n=62)
Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?

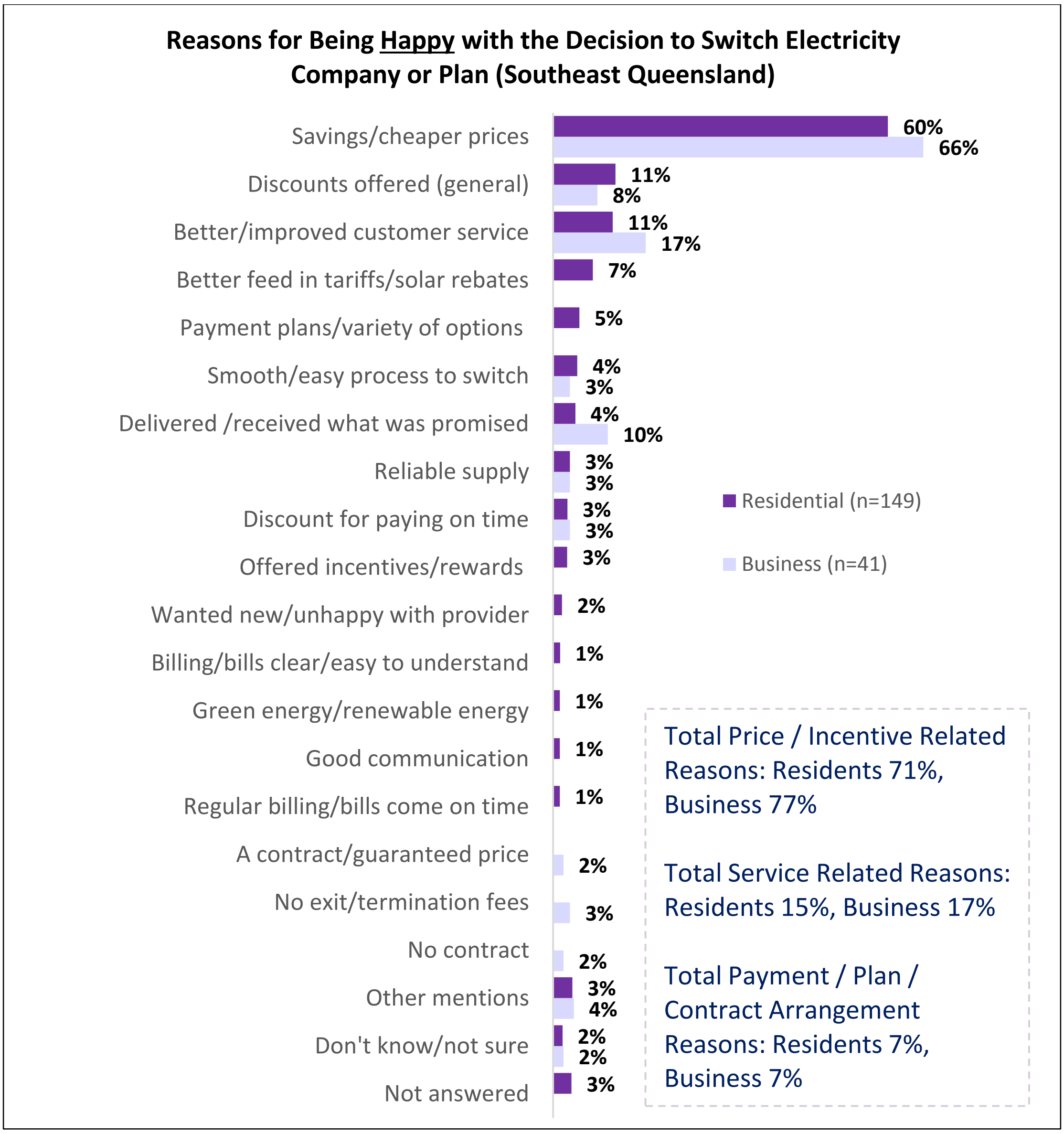
Satisfaction with Switching



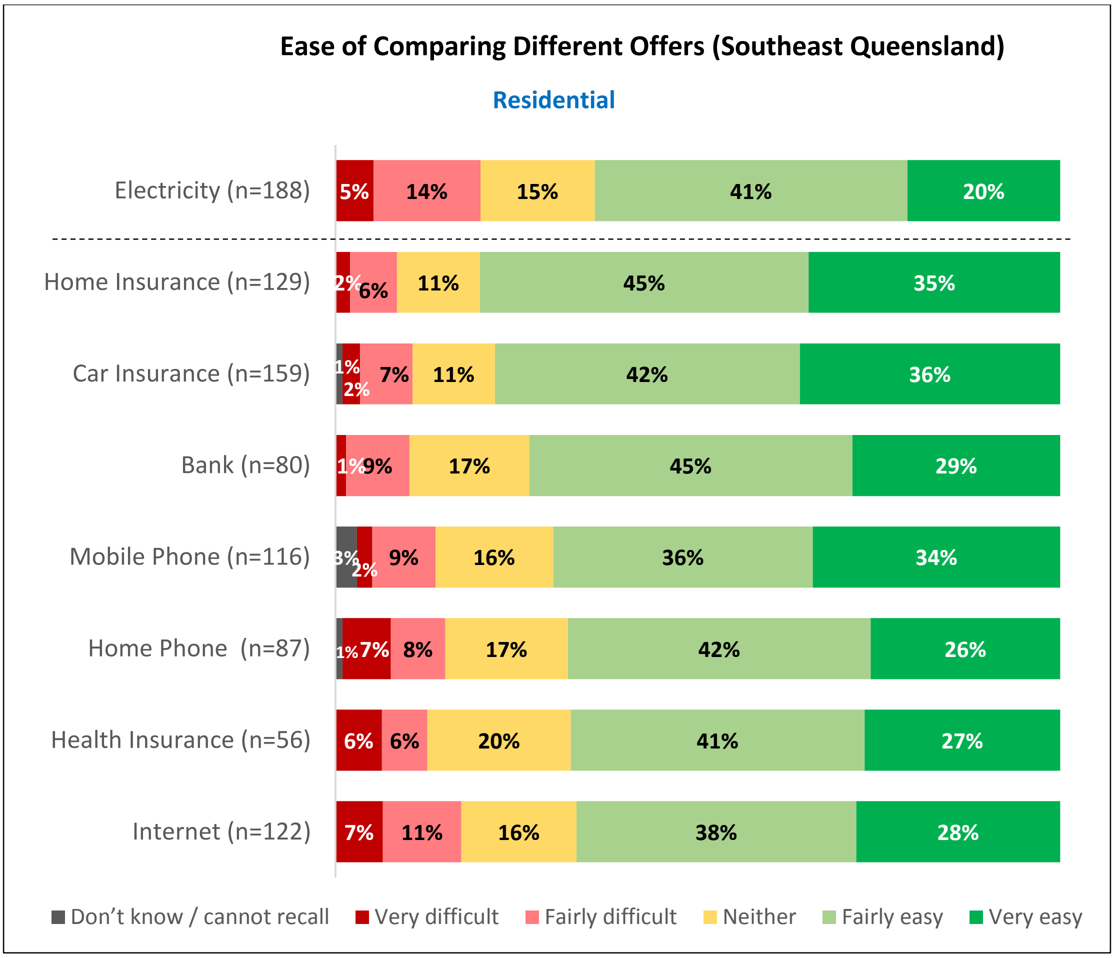
Base: Respondents who had switched their electricity company or plan (Residential n=188). NB: Gas results not shown due to small sample size (n=15)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



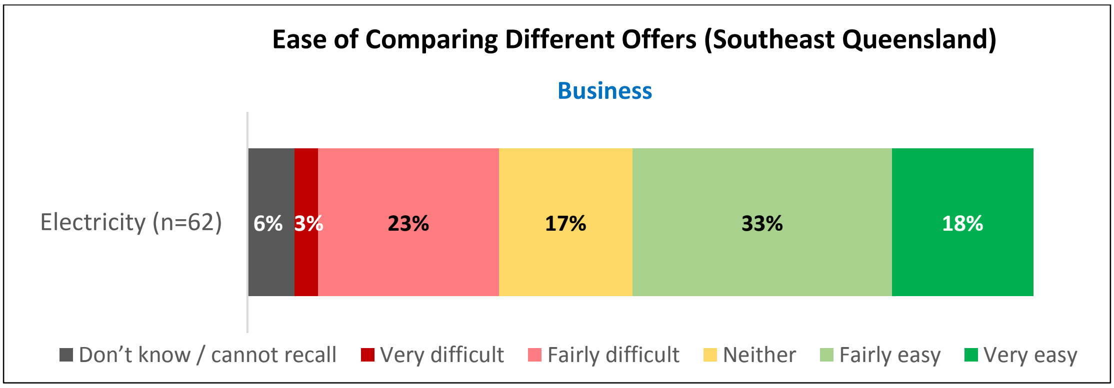
Base: Respondents who had switched their electricity company or plan (Business n=62). NB: Gas results not shown due to small sample size (n=1)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.



Base: Respondents who agreed they were happy with their decision to switch. NB: Gas results not shown due to small sample size (Residential n=14, Small Business n=0)
Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE

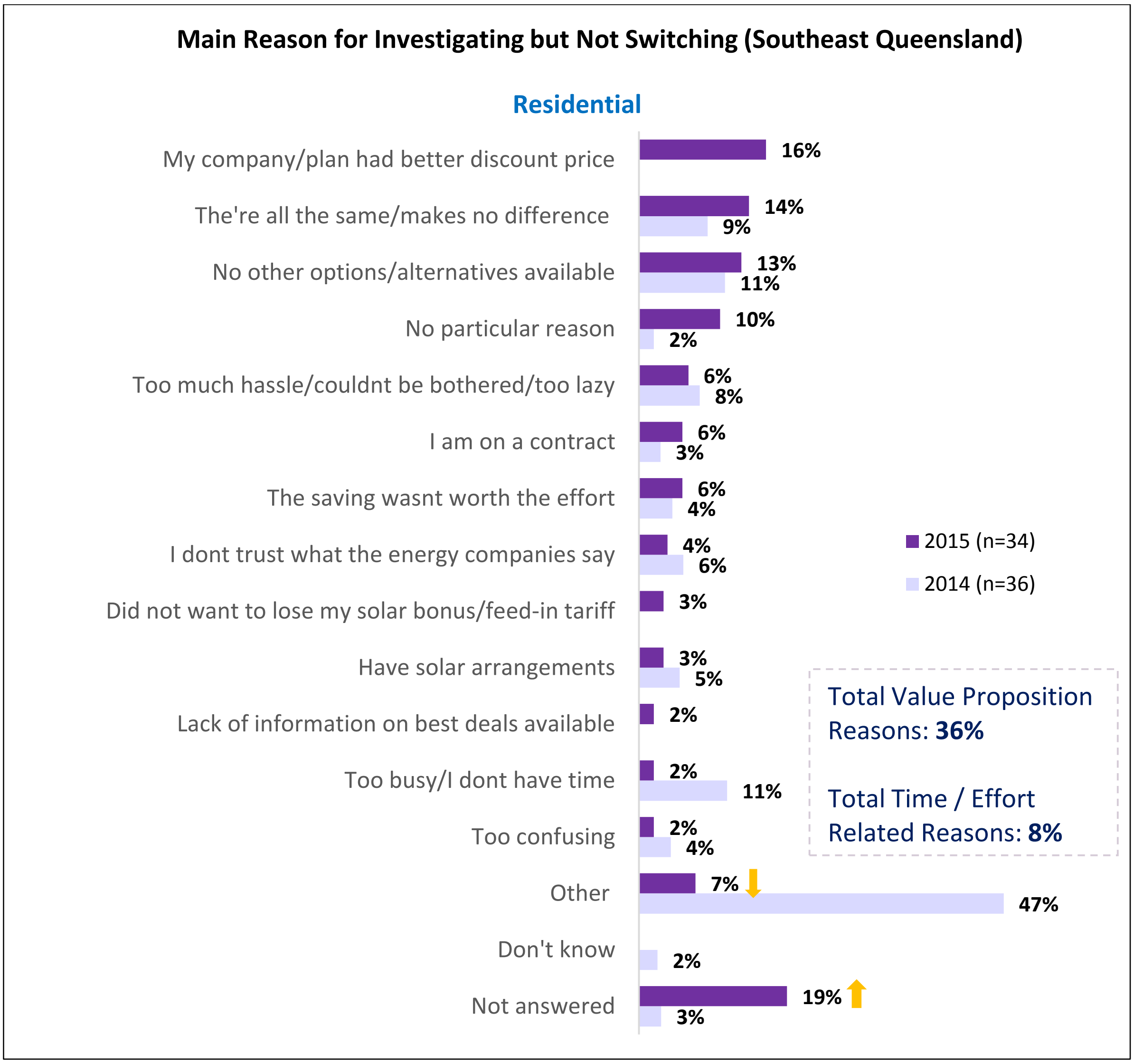


Base: Respondents who switched their company / provider or plan. NB. Gas results not shown due to small sample size (n=15)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
D7a. The last time you changed your [INSERT FROM D7] provider, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

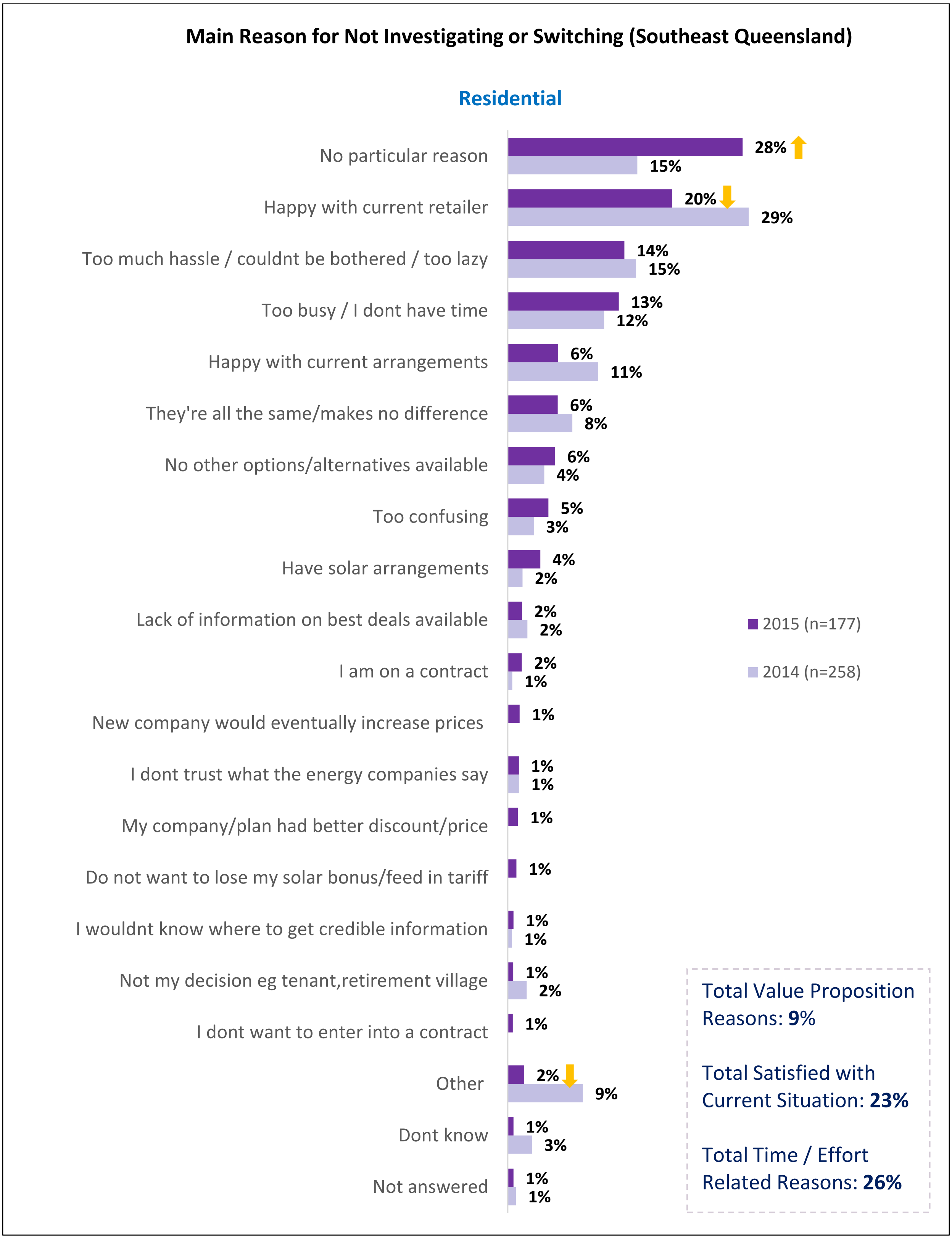


Base: Respondents who switched their company / provider or plan. NB: Results for gas not shown due to small sample size for small business (n=1)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

Barriers to Investigating Offers or Switching



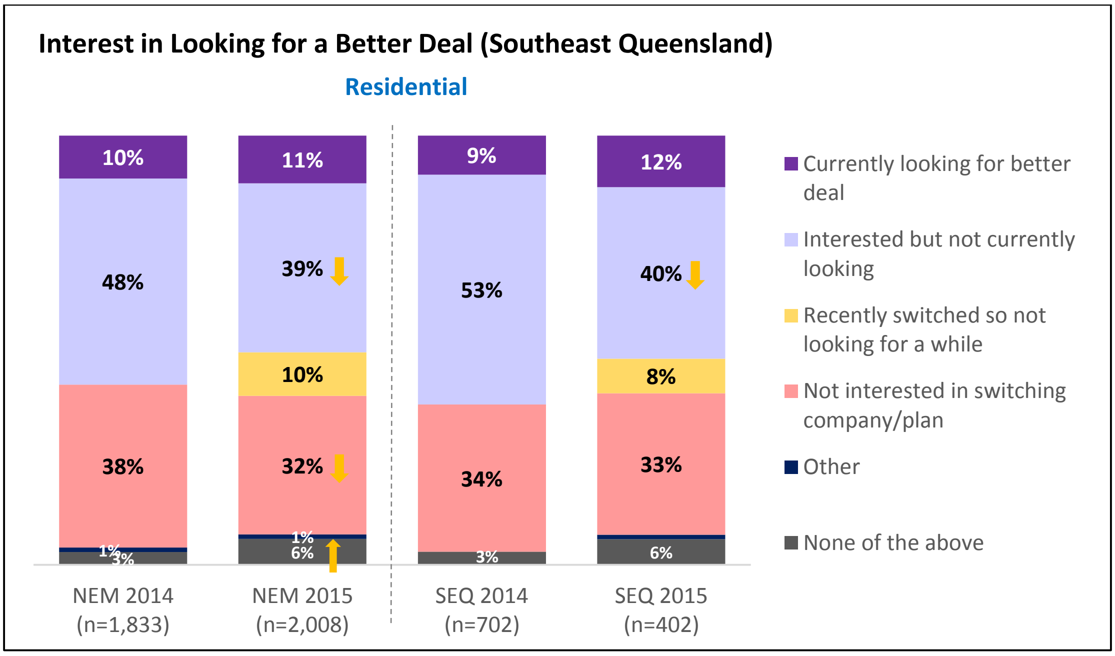
Base: Respondents who investigated offers and options but haven't switched in the past 12 months. Business results not shown due to small sample size (n=9)
Q32. And what was the main reason why you investigated different offers and options but haven't changed your energy company or plan in the last 12 months? Any others? MULTIPLE RESPONSE



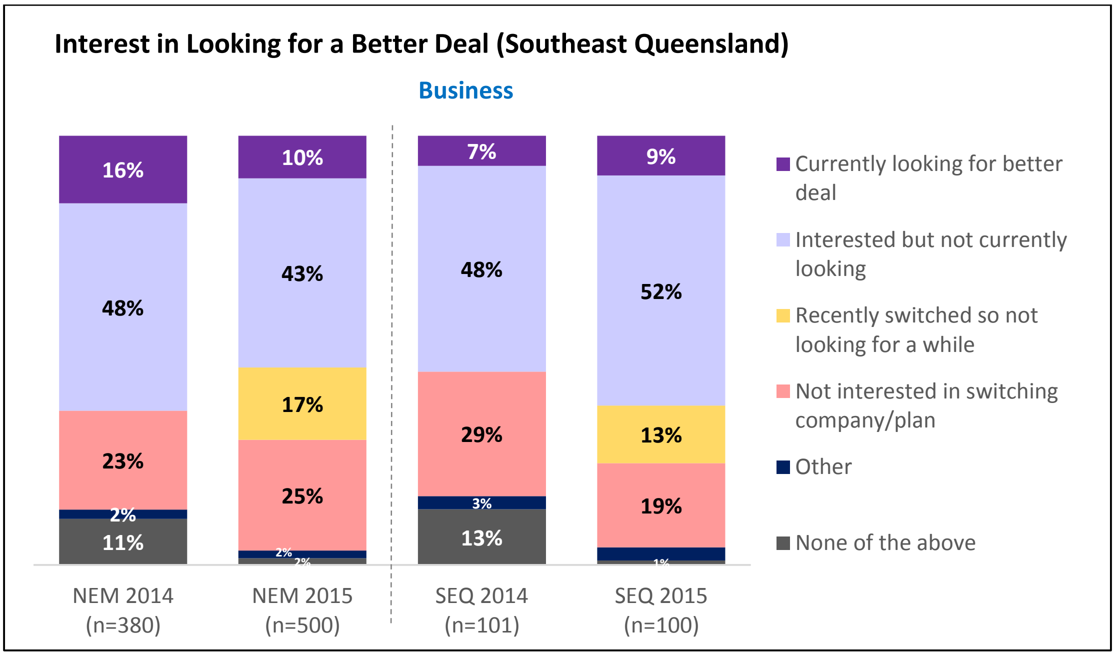
Base: Respondents who had not investigated offers and options or switched in the past 12 months. NB: Business results not shown due to small sample size (n=29)

Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

Switching Intentions and Attitudes



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=2,008)	SEQ (n=402)
Total	**$207**	**$230**
Last Quarterly Electricity Bill: Less than $300	$178	$190
Last Quarterly Electricity Bill: $300-$500	$210	$250
Last Quarterly Electricity Bill: $500 or more	$247	$257

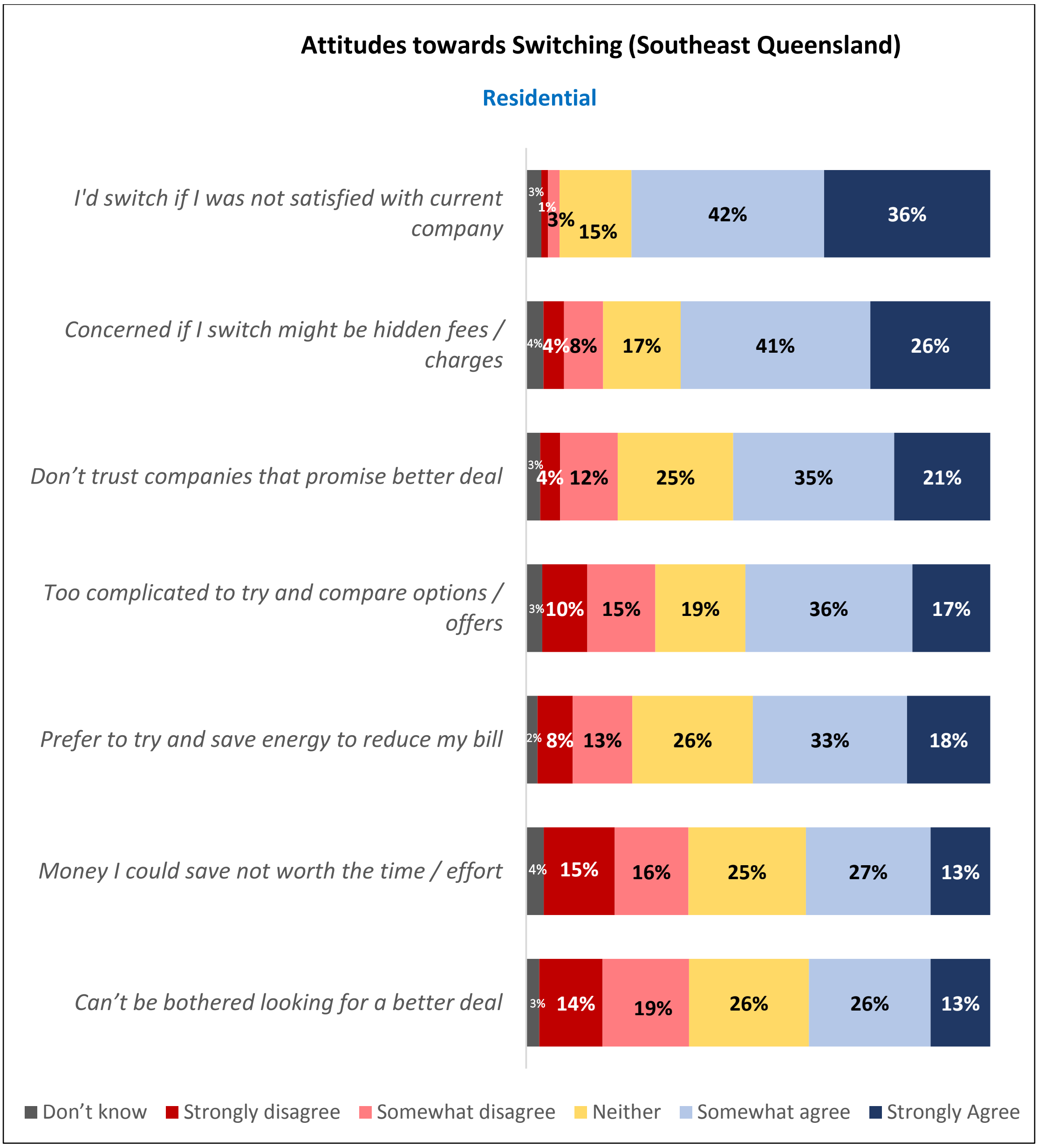
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Business	
	NEM (n=500)	SEQ (n=100)
Total	**$609**	**$627**
Last Quarterly Electricity Bill: Less than $500	$257	$311
Last Quarterly Electricity Bill: $500-$999	$462	$577
Last Quarterly Electricity Bill: $1,000 or more	$1,117	$1,146

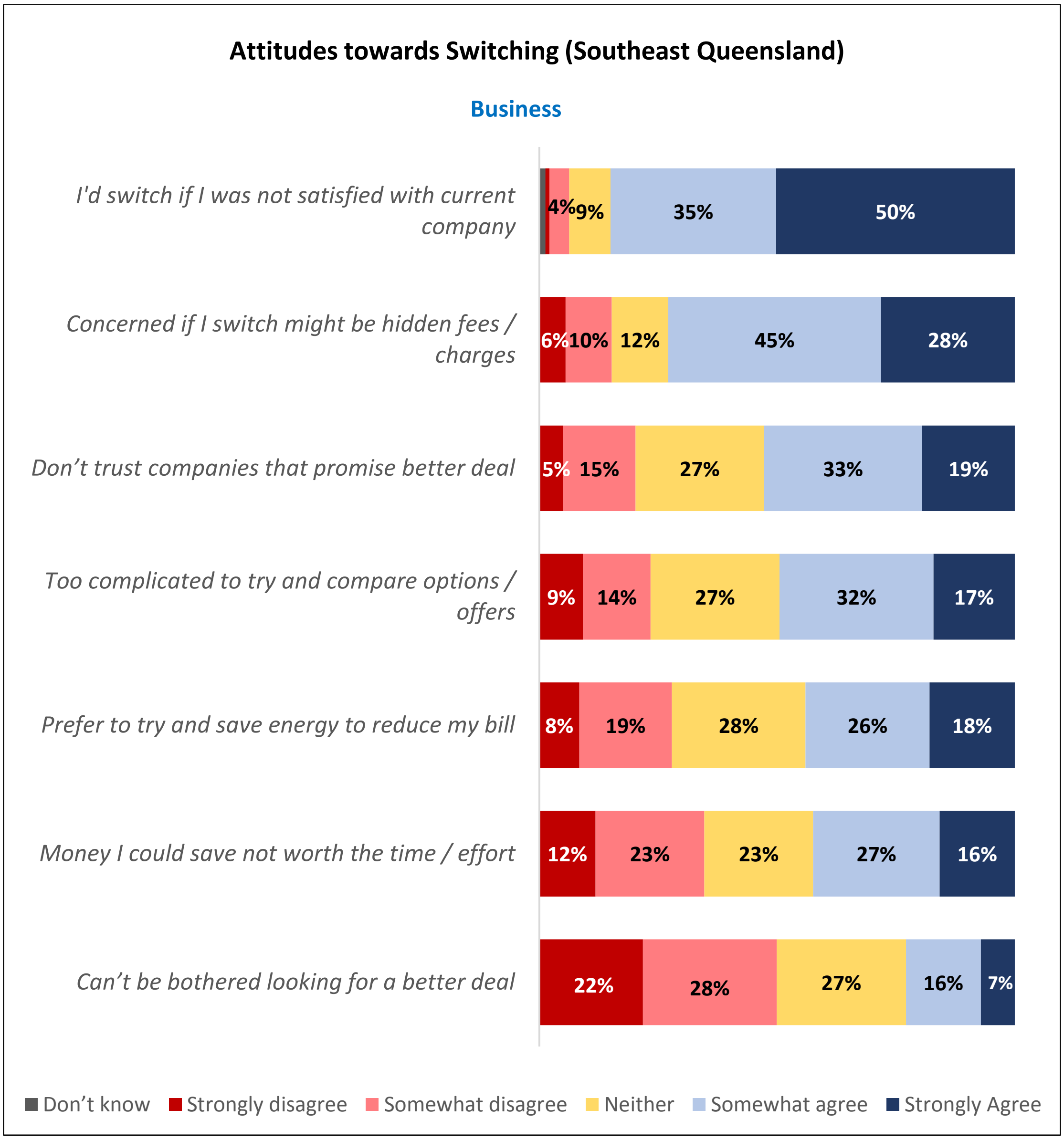
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=908)	SEQ (n=69)
Total	**$162**	**$144**
Last Quarterly Gas Bill: Less than $100	$120	$125
Last Quarterly Gas Bill: $100 - $300	$163	$143
Last Quarterly Gas Bill: $300 or more	$169	$136

Base: Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=9)
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?



Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=100)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

4.2.3 Consumer Satisfaction with the Market

Summary of Findings

Overall levels of satisfaction with the level of market choice in southeast Queensland remained consistent among residents between 2014 and 2015 with around half being somewhat or very satisfied (48% vs. 49% in 2014). Satisfaction among business consumers declined a little in 2015 (40% vs. 53% in 2014), however this change was not significant.

Note however that compared to the NEM average, satisfaction with the level of market choice among consumers in southeast Queensland was lower.

Satisfaction with the level of market choice was higher among those with mains connected gas, those currently receiving a rebate or concession, those who have special payment arrangements in place, those with solar panels and those who have switched energy company in the past 12 months.

This was consistent with the qualitative research conducted in southeast Queensland as part of the 2014 Retail Competition Review, which found that many saw market choice as creating added confusion rather than improving the value proposition or levels of service.

Results for satisfaction with current electricity and gas companies in 2015 were mostly consistent with 2014. Residential consumers tended to rate their current energy company higher than small business consumers.

Electricity

Nearly two thirds of residents (63%) and just over half of the small business consumers (56%) were somewhat or very satisfied with their current electricity companies. These results were slightly lower than the NEM average. Residents receiving a rebate or concession, retirees and those with solar panels were significantly more satisfied.

Around three in five residential consumers (61%) and less than half of small business consumers (45%) rated the overall quality of customer service provided by their electricity company quite highly (rating of 7 or more out of 10). Residents with mains connected gas, those currently receiving a rebate or concession and those with a special payment arrangement as a result of hardship rated the quality of customer service significantly higher.

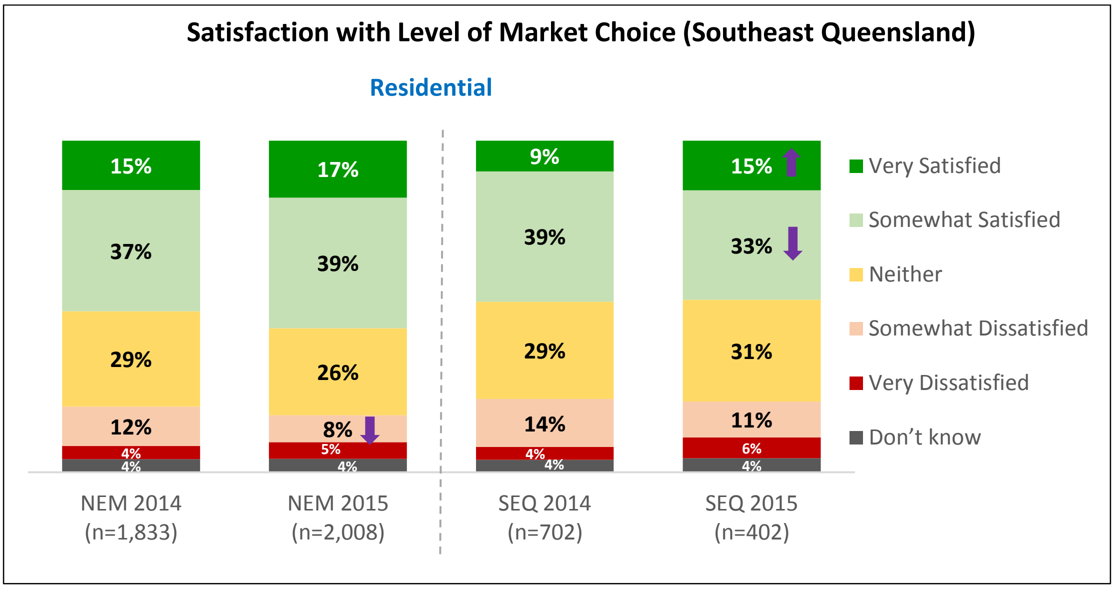
Among residential consumers, ratings of overall value for money were consistent with 2014 ratings (47% rated seven or more in 2015 vs. 46% in 2014). Although not statistically significant, ratings among small business consumers decreased this year (33% vs. 48% in 2014 rating a 7 or more). Ratings were higher among residents who had mains connected gas, those who were receiving a rebate or concession, those with a special payment arrangement as a result of hardship, those who have solar panels and those who had actively investigated offers.

Gas

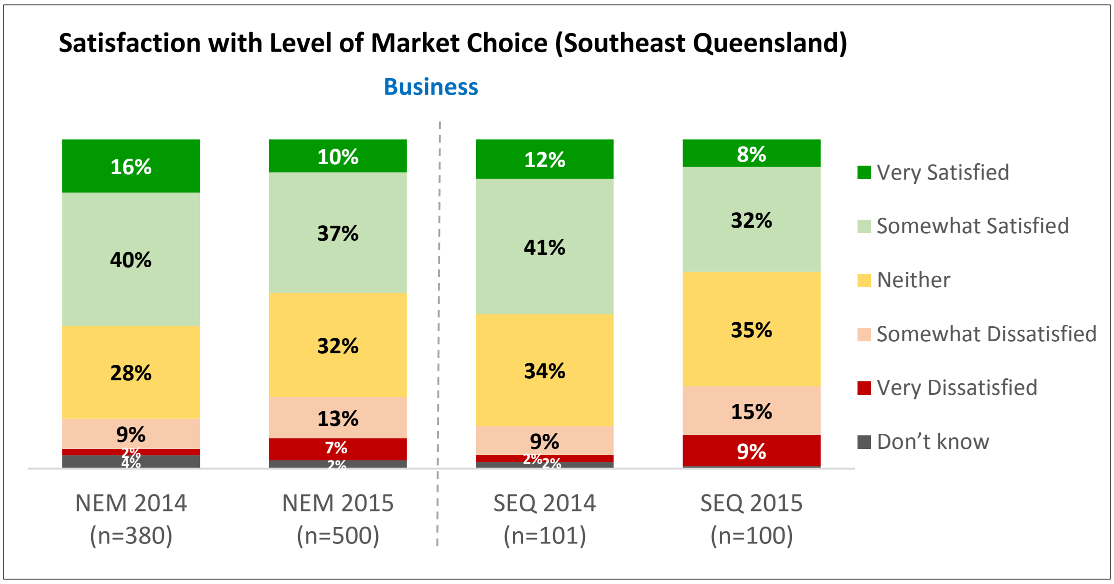
Just over two thirds of residential consumers (65%) were very or somewhat satisfied with their current gas company. Seven in ten residents (72%) rated the overall quality of customer service provided by their gas company quite highly (7 or more out of 10) and six in ten (60%) rated the overall value for money provided by their electricity company quite highly.

The Results

Satisfaction with Level of Choice

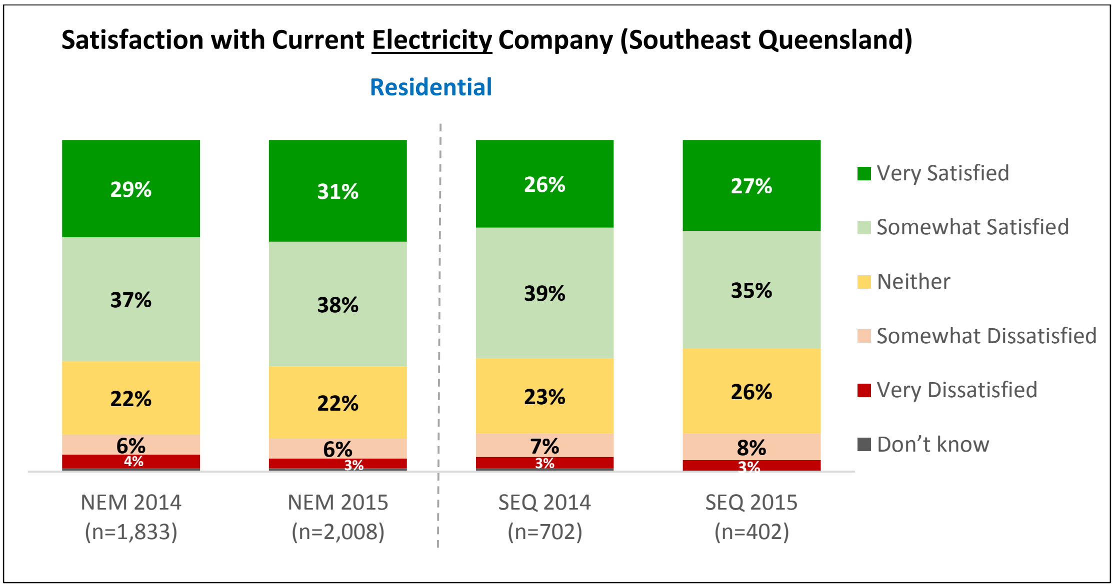


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

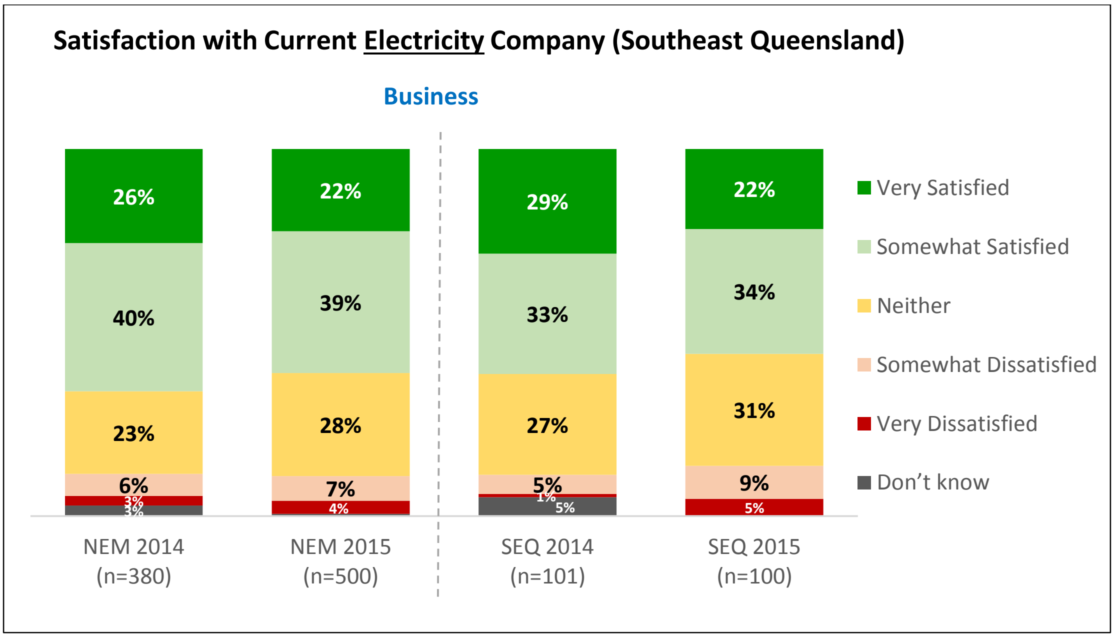


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

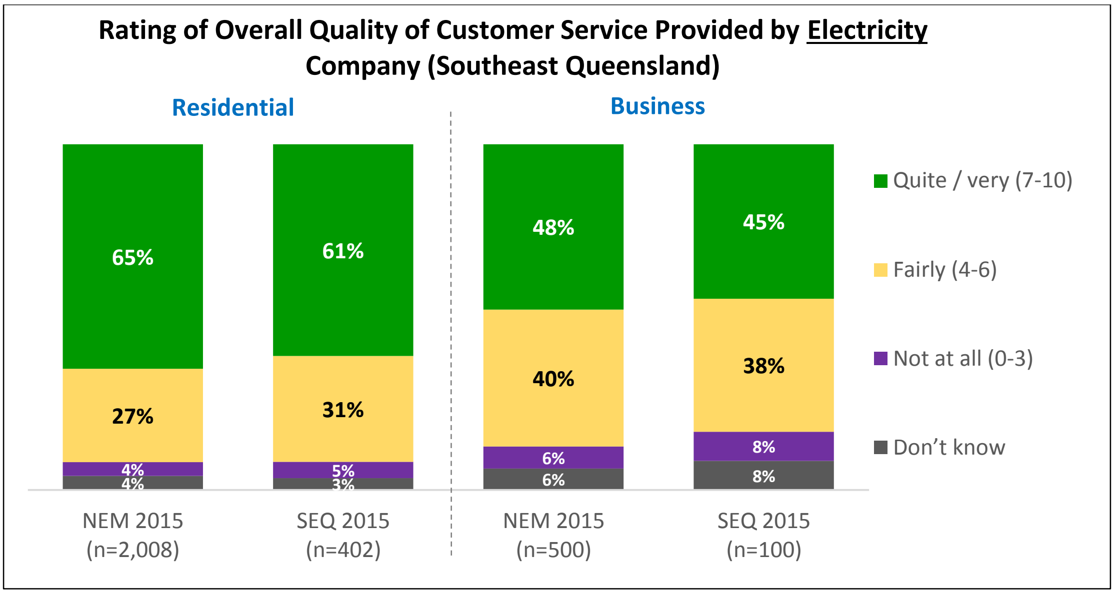
Satisfaction with Electricity Companies



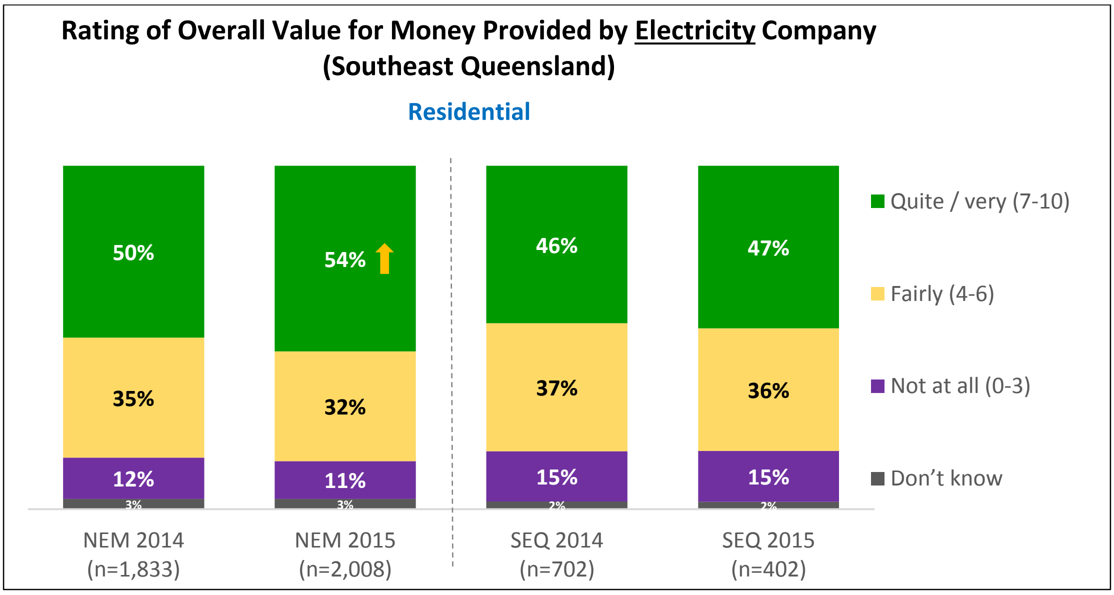
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



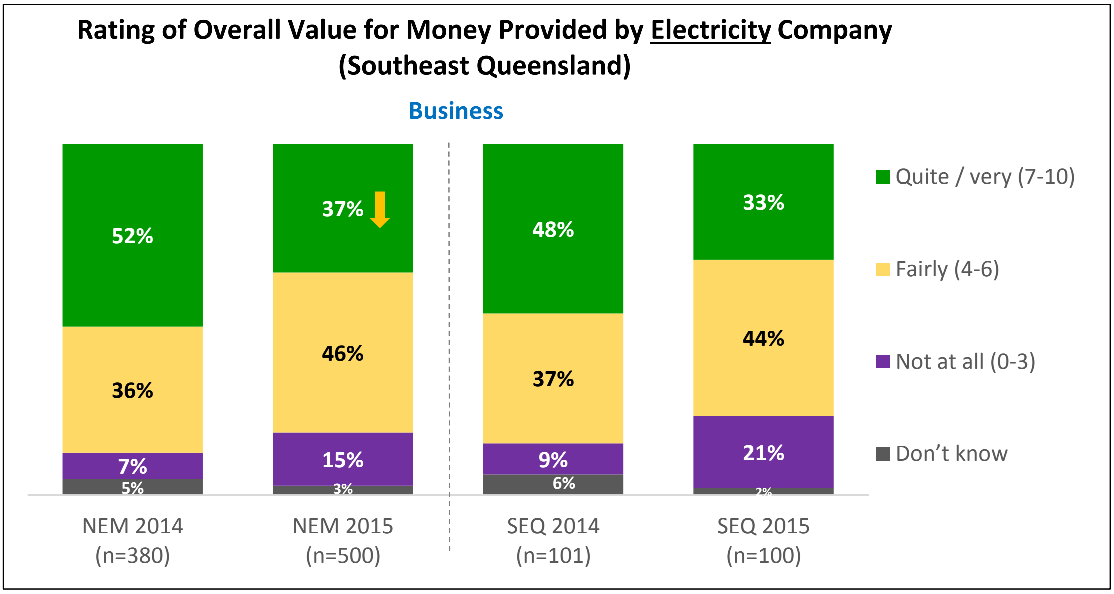
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



Base: All Respondents
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

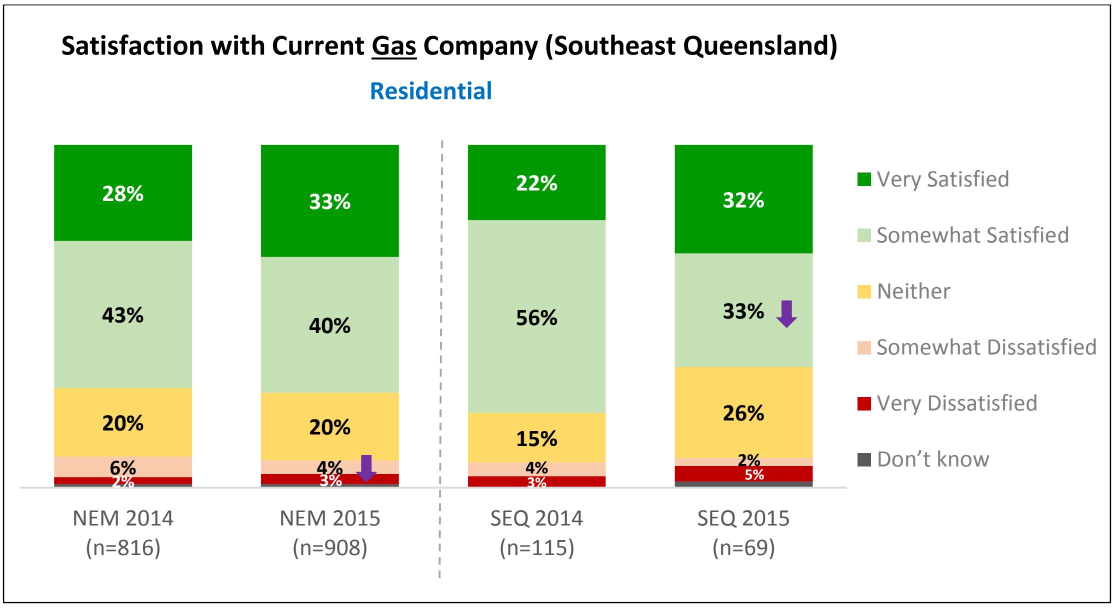


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

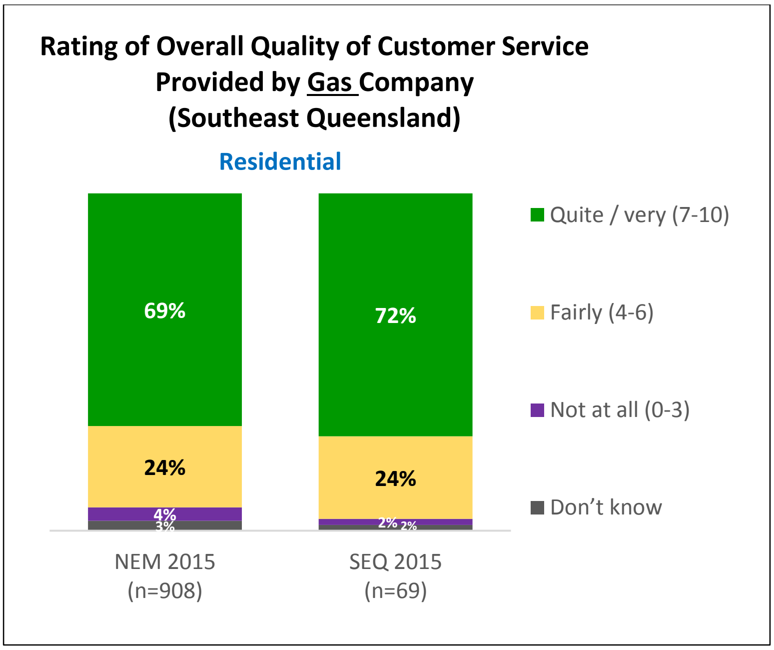


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

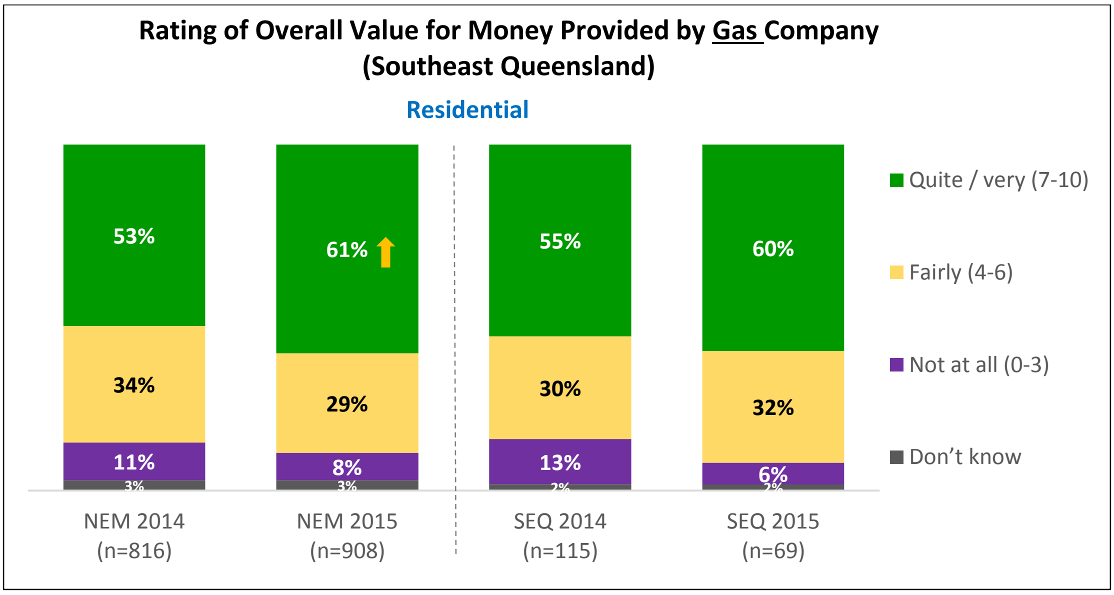
Satisfaction with Gas Companies



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=9)
Q7. And how satisfied are you with your current gas company?



Base: All Respondents. NB: Business results not shown due to small sample size (n=9)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=9)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

4.2.4 Information Sources and Gaps

Summary of Findings

The internet remained the most used information source to help residential consumers to switch electricity company or plan or investigate offers, with mentions of both Google and internet searches in general (41% used internet based sources in total). The second most preferred information source among residents was direct contact with the energy company i.e. door-to-door, over the phone etc. (26%).

In 2015, survey respondents were also asked which information source they thought was most useful. After the internet (15%), the next most useful information sources for residents included price comparison websites (13%) and retailer websites (11%).

Small business consumers were more likely to use the internet for investigating offers (37%) compared with last year (19%). Among small business consumers who had switched, internet based sources (34%) and simply looking at the price and the best saving (22%) were the most useful sources.

When prompted, a little over a third of residential consumers who had switched electricity company or plan in the last five years (36%) and over half of business consumers (54%) said they had used a price fact sheet to understand the details of the electricity offer when they switched. Just 1% of residential consumers mentioned this as a useful information source without prompting. Among residential consumers who had not switched company or plan, when prompted, over half had used a price fact sheet (54%).

When it comes to confidence in finding the right information to choose a suitable energy plan, half of residential consumers (50%) and four in ten business consumers (43%) were quite or very confident (rating 7 or more out of 10). This result is in line with the NEM average.

Further analysis shows that:

- Residents with mains connected gas, those who had switched energy company or plan in the last 12 months, those approached by an energy company and those who had actively investigated offers and options were significantly more confident in being able to find the right information to choose a suitable energy plan.
- These confidence levels were very similar to those relating to choosing the right energy options or offer for the household and the two questions were highly correlated (0.66) suggesting there is a strong relationship between confidence in choosing the right energy offer and confidence in finding the right information.

When considering confidence in finding the right information it is important to note that the 2014 qualitative research suggested that this confidence was overstated.

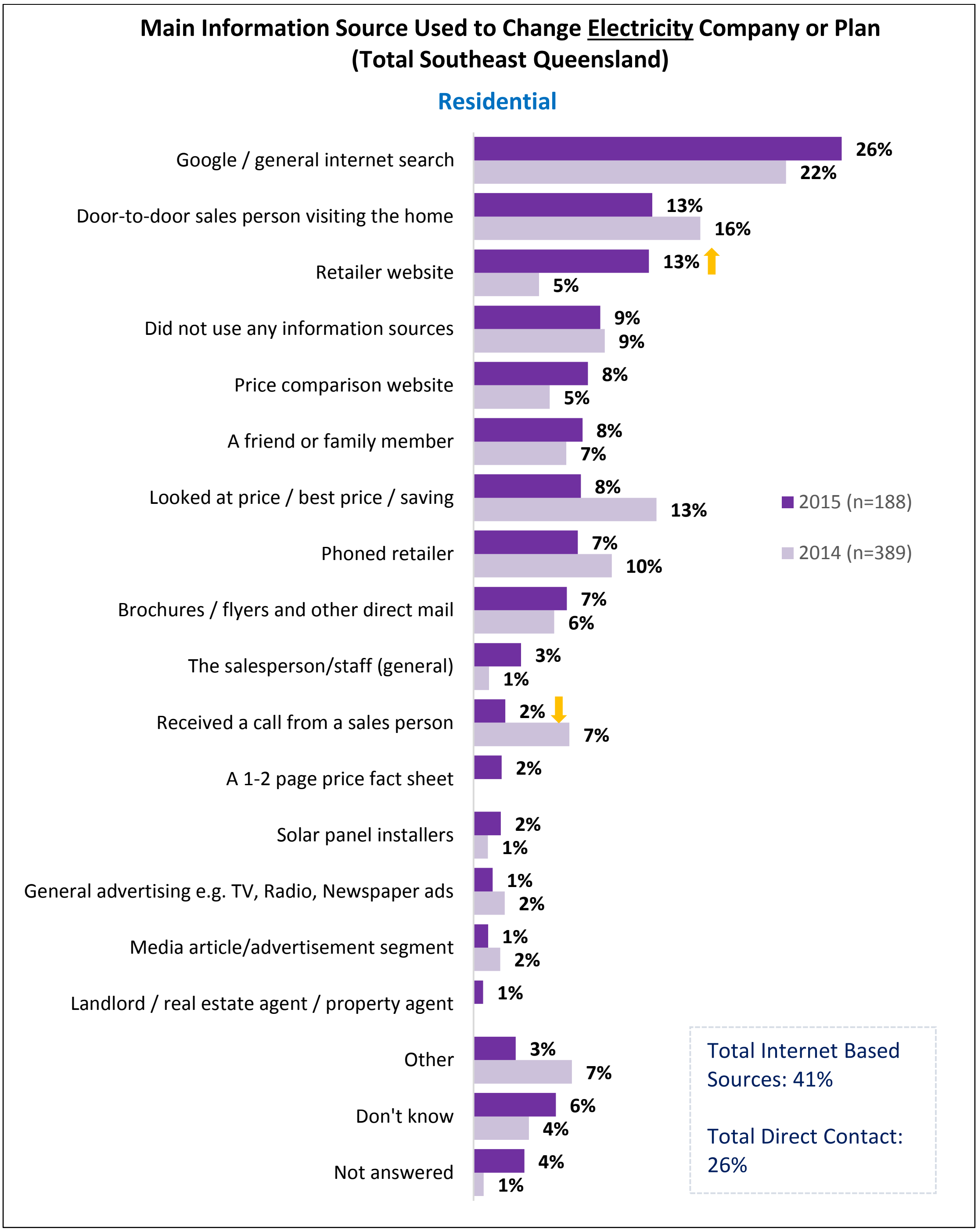
Unprompted awareness of comparison websites remained quite low in 2015. Two thirds of consumers (70% residential, 76% small business) could not name any comparison sites at all and a further (3% residents and 4% business consumers) were aware there were comparison sites but could not recall any specific names.

iSelect was the most commonly mentioned comparison site among both residential (10%) and small business consumers (11%). A smaller proportion of consumers also recalled Choosi (4% residential, 1% small business consumers), OneBigSwitch (2% residential and 4% small business), Compare the Market (4%, 1%) or Choice (1%, 3%).

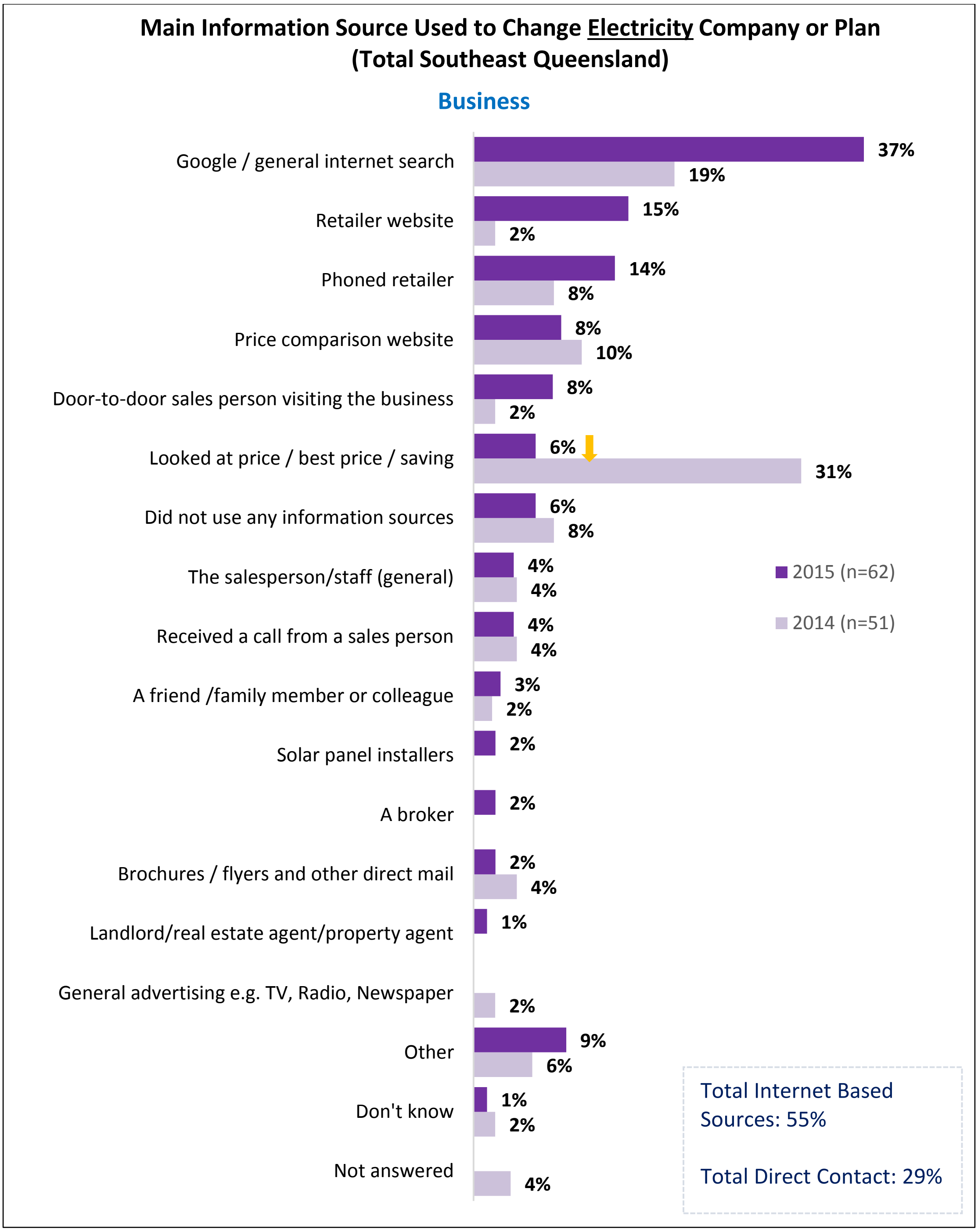
When prompted, around one in ten residents (14% up slightly from 12% in 2014) and 8% of small business consumers (down from 19% in 2014) had heard of the QCA Price Comparator website. There were no unprompted mentions of the QCA Comparator website.

The Results

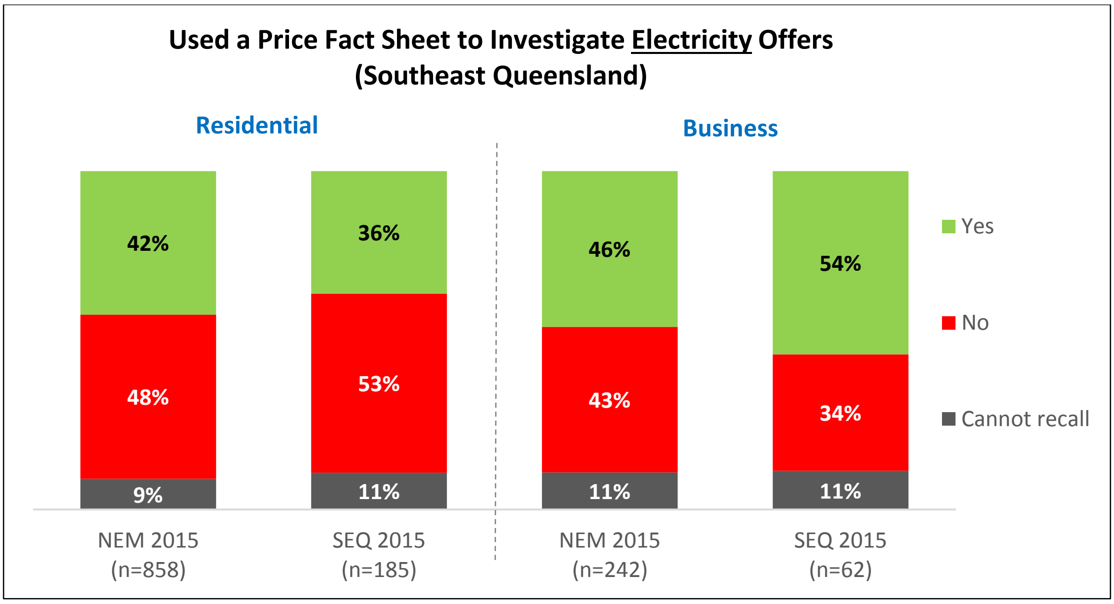
Information Sources Used to Investigate Offers or Switch



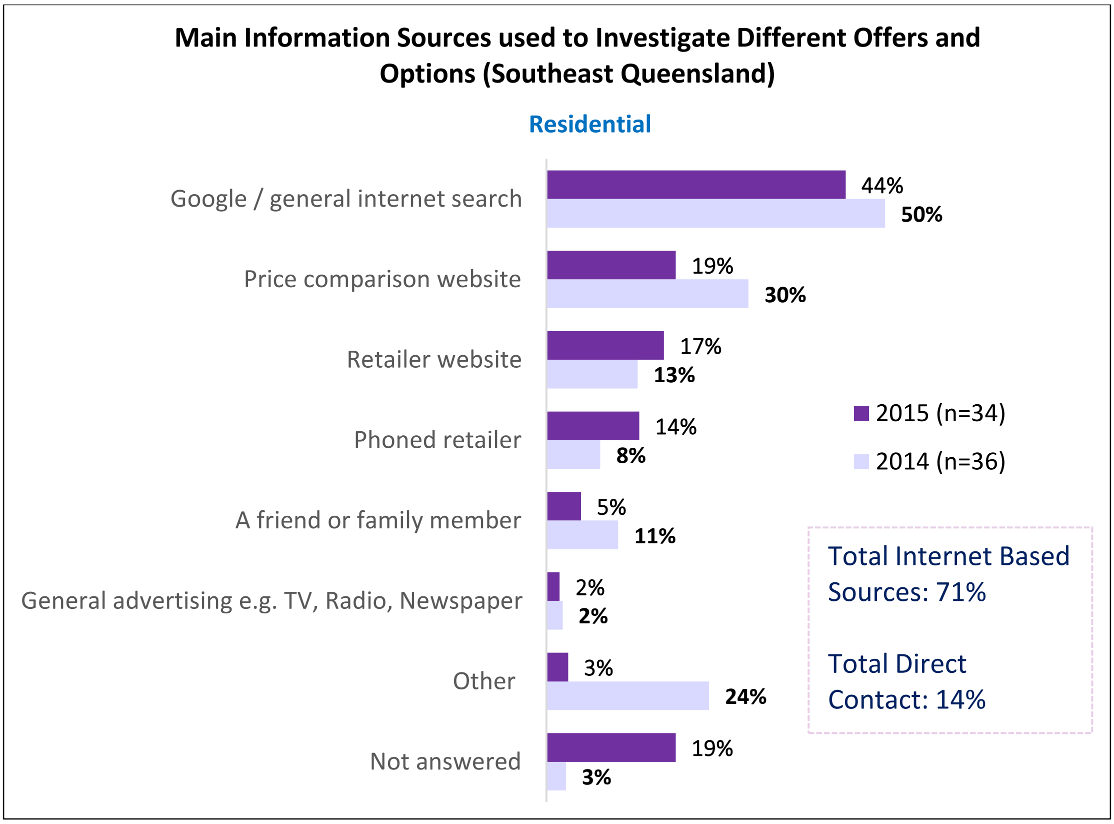
Base: Respondents who had switched electricity company or plan in the past five years NB: Gas results not shown due to small sample size (n=15)
Q23. The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



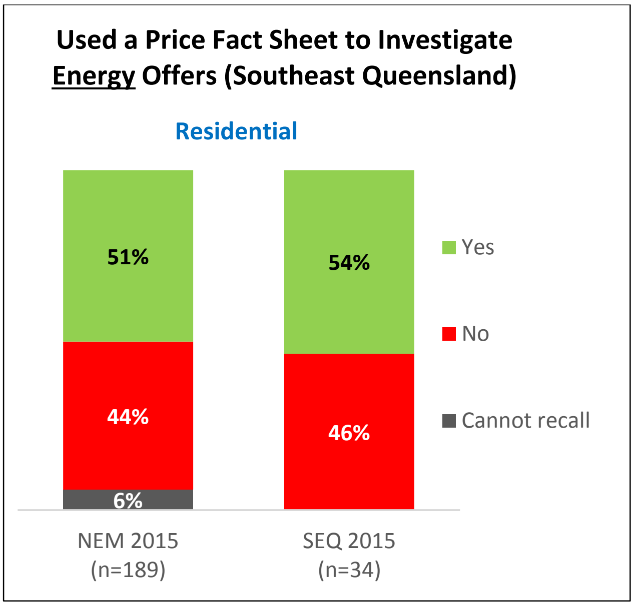
Base: Respondents who had switched electricity company or plan in the past five years NB: Gas results not shown due to small sample size (n=1)
Q23. The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



Base: Respondents who had switched electricity company or plan in the last five years
Q48. The last time you investigated changing your electricity company or plan, did you use a price fact sheet to understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

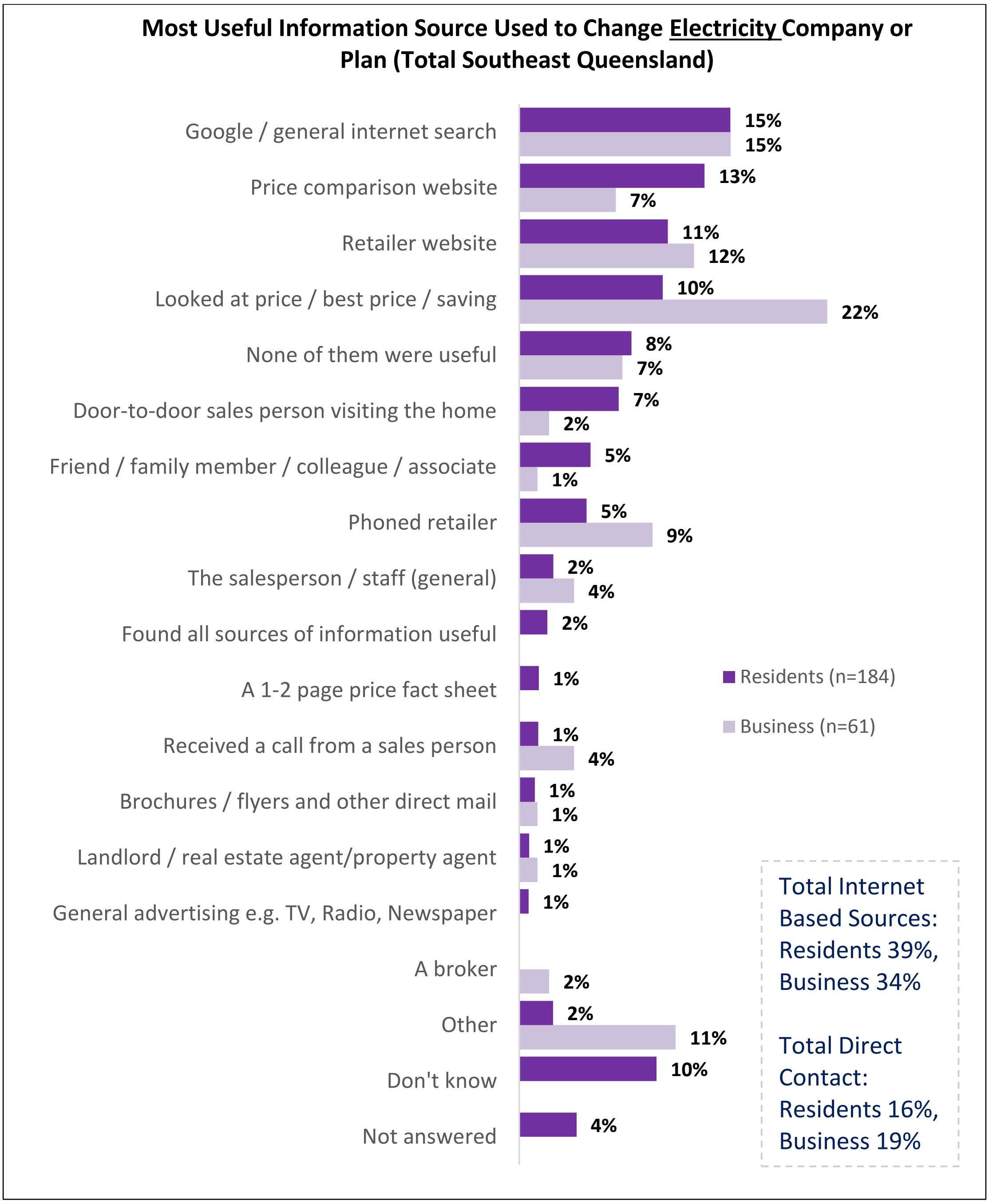


Base: All Residential Respondents who had investigates offers or options. NB: Business results not shown due to small sample size (n=9)
Q31. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your investigation? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE

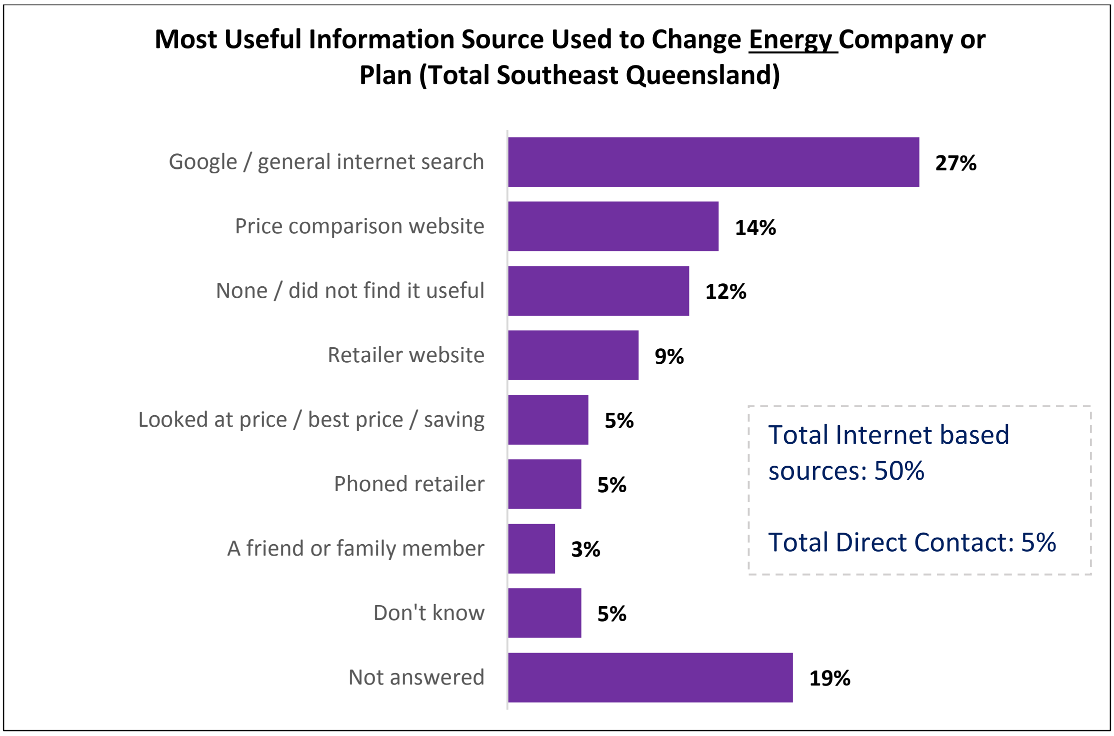


Base: Respondents who had not switched company or plan in the past five years but had investigated different options in the last 12 months. NB: Business results not shown due to small sample size (n=9)
Q58. The last time you investigated changing your electricity or gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

Most Useful Information Sources

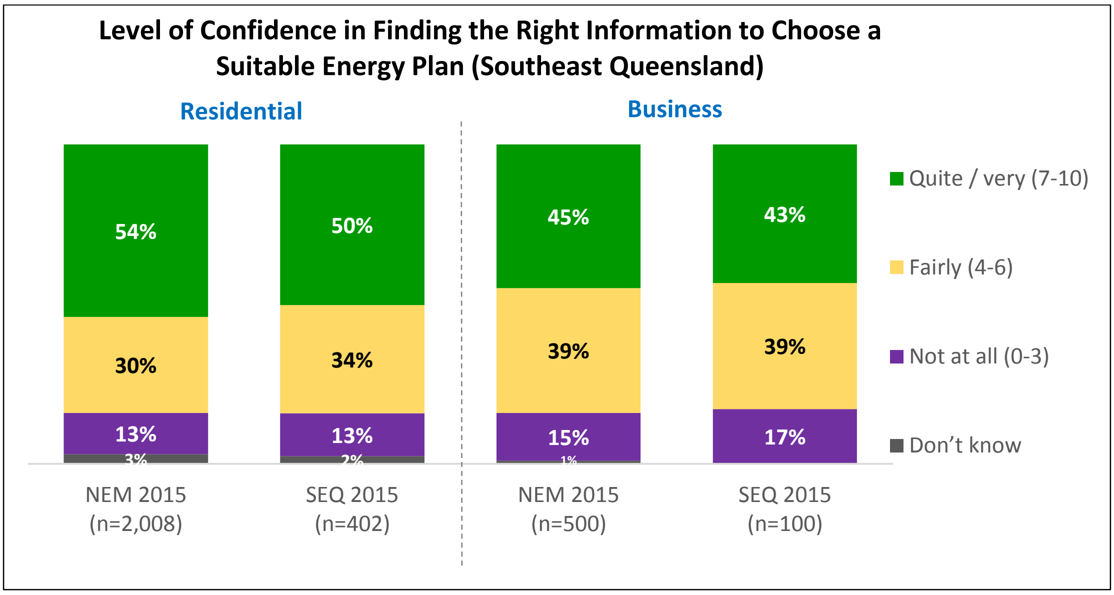


Base: Respondents who had switched electricity company or plan in the last five years. NB: Gas results not shown due to small sample size (n=14)
Q47. And thinking about the information sources you used when changing your electricity company or plan, which one was most useful in helping with your decision to switch?



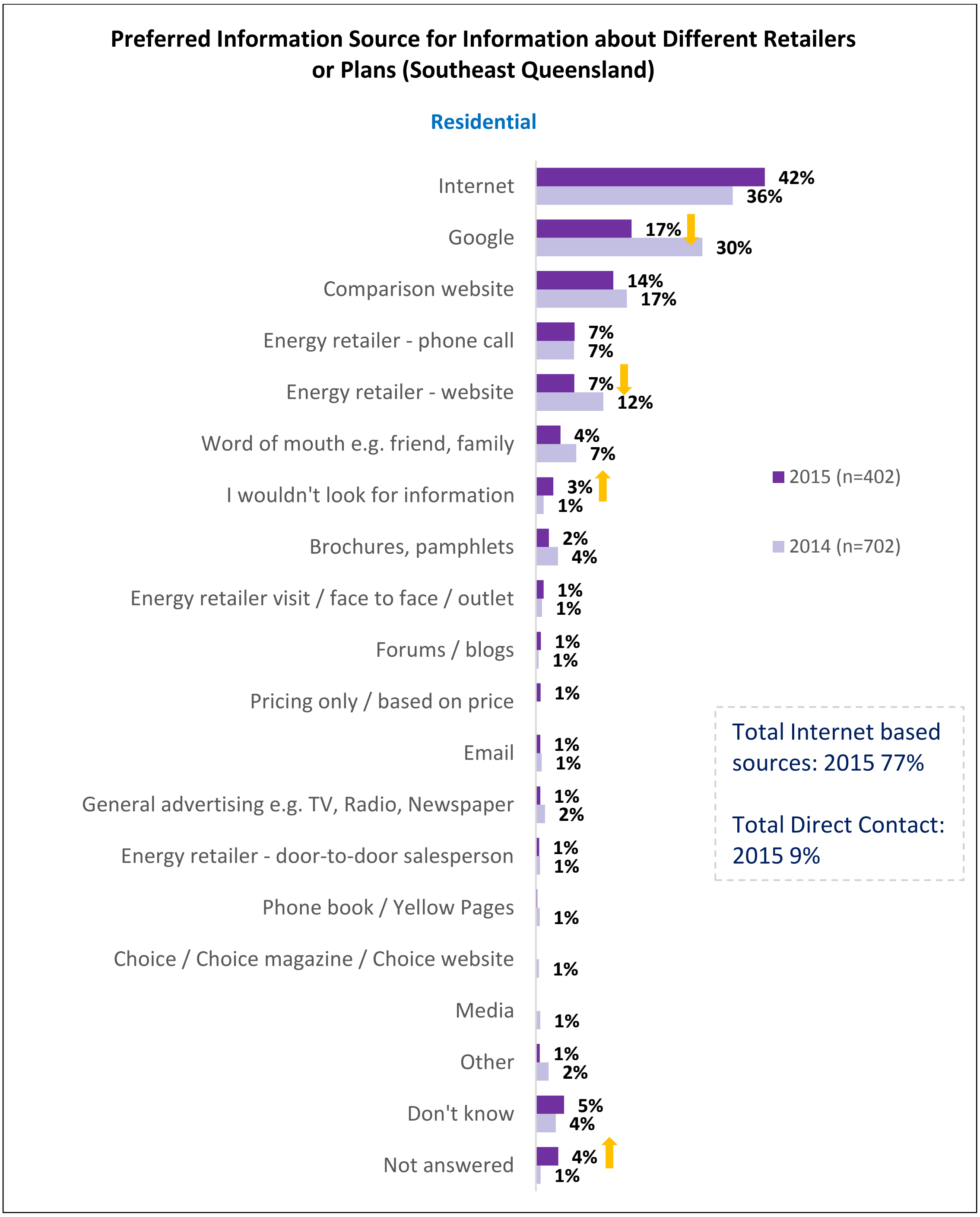
Base: Residential Respondents who had not switched company or plan in the past five years but had investigated different options in the last 12 months (n=34). NB: Business results not shown due to small sample size (n=9)
Q57. And thinking about the information sources you used when investigating different offers or options, which one was most useful in helping with your decision whether or not to switch?

Adequacy of Information

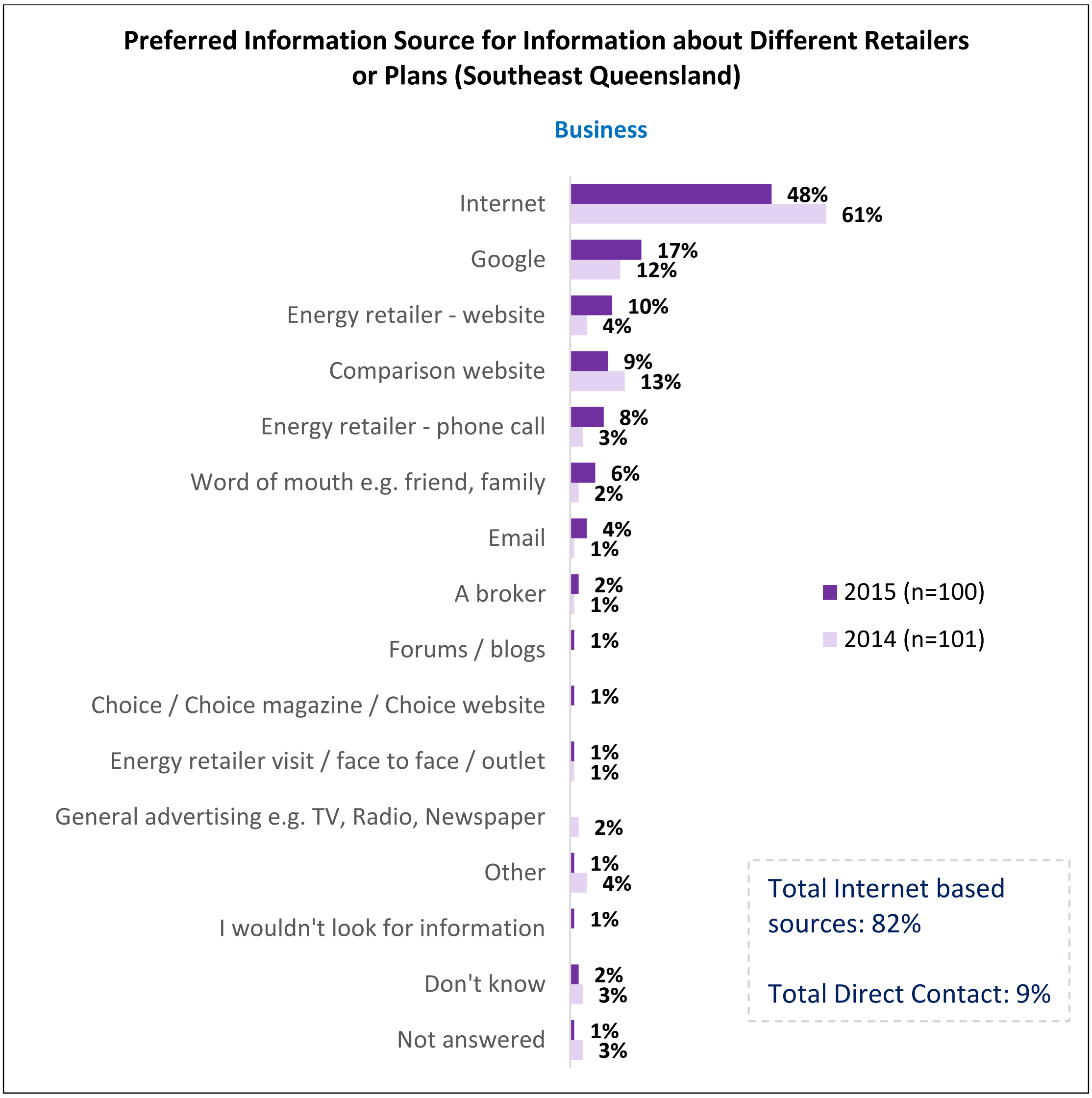


Base: All Respondents
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Preferred Information Sources



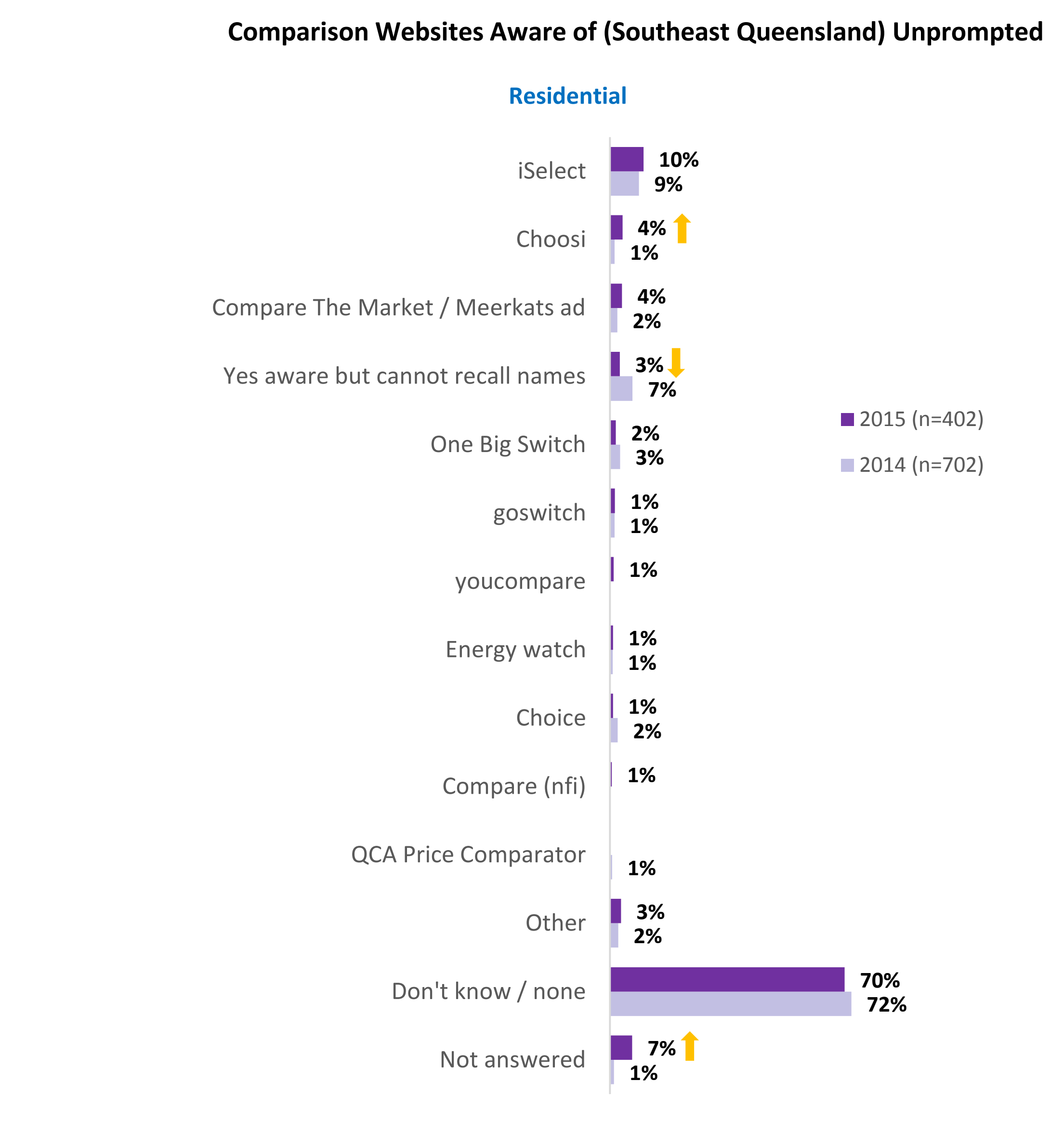
Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?



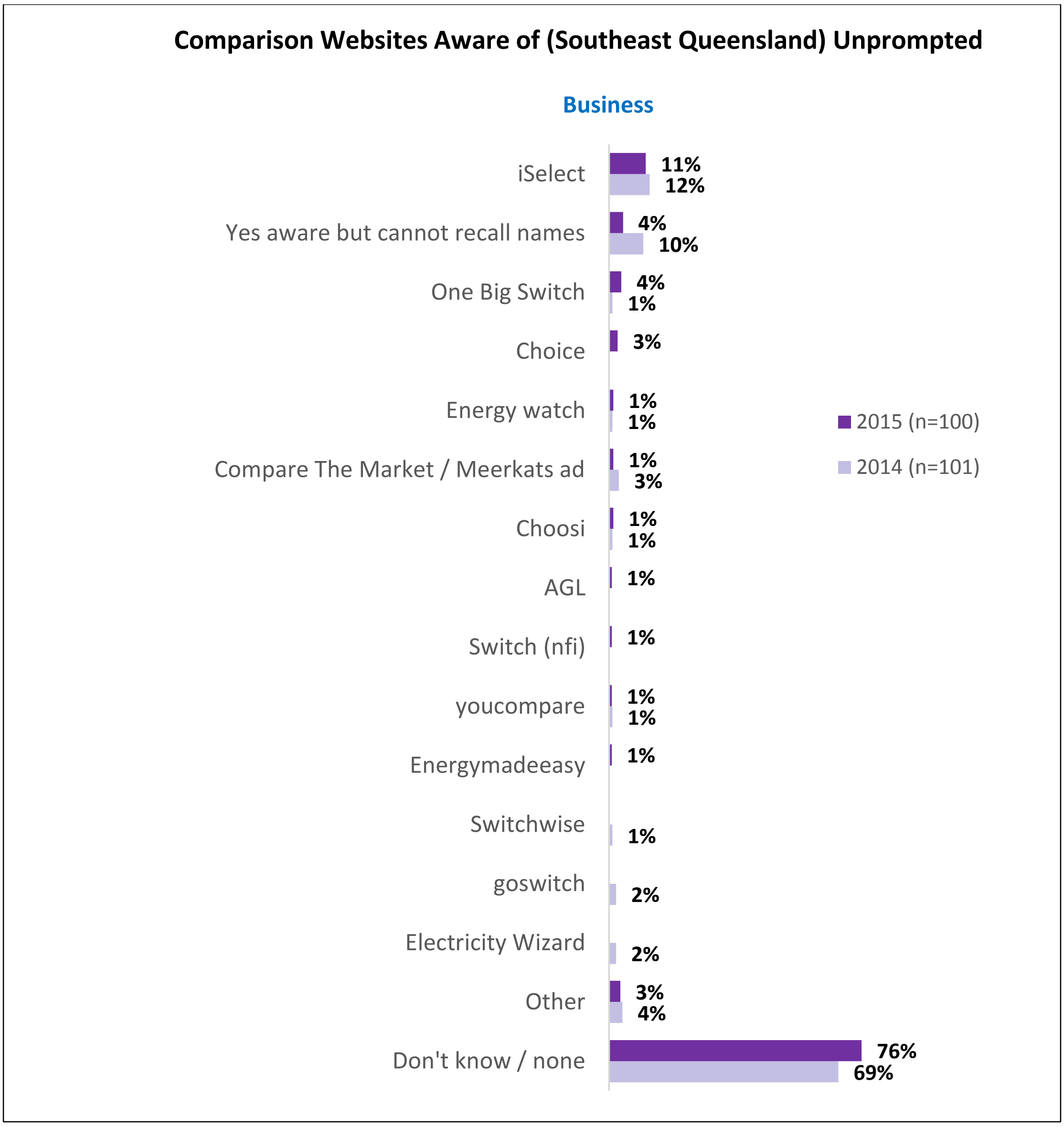
Base: All Respondents

Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

Awareness of Comparison Sites

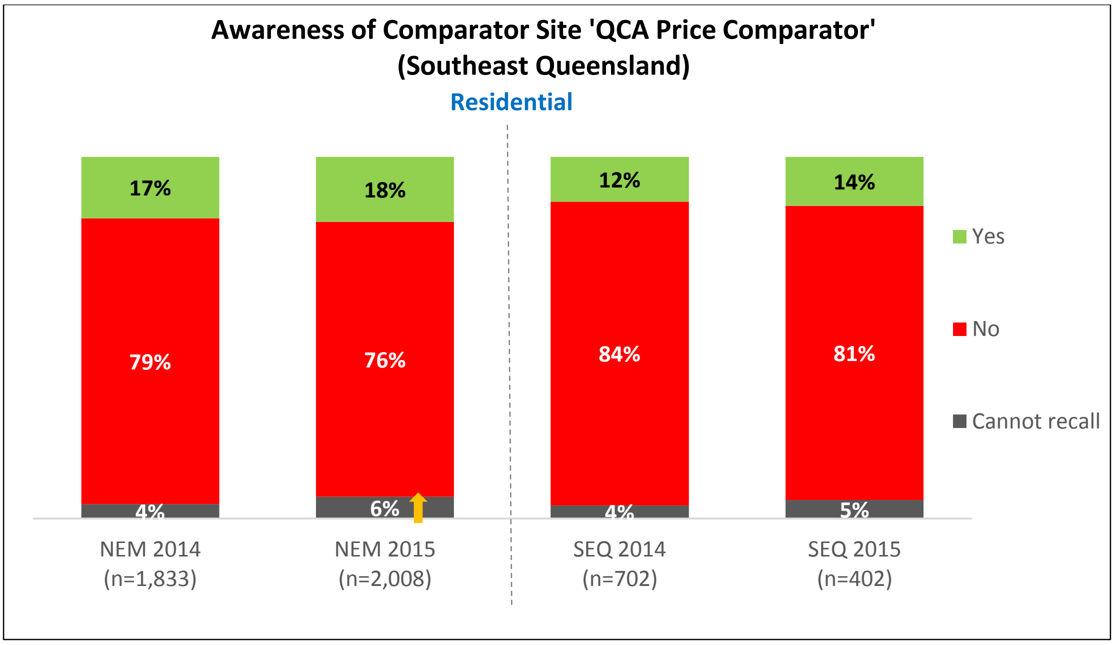


Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE

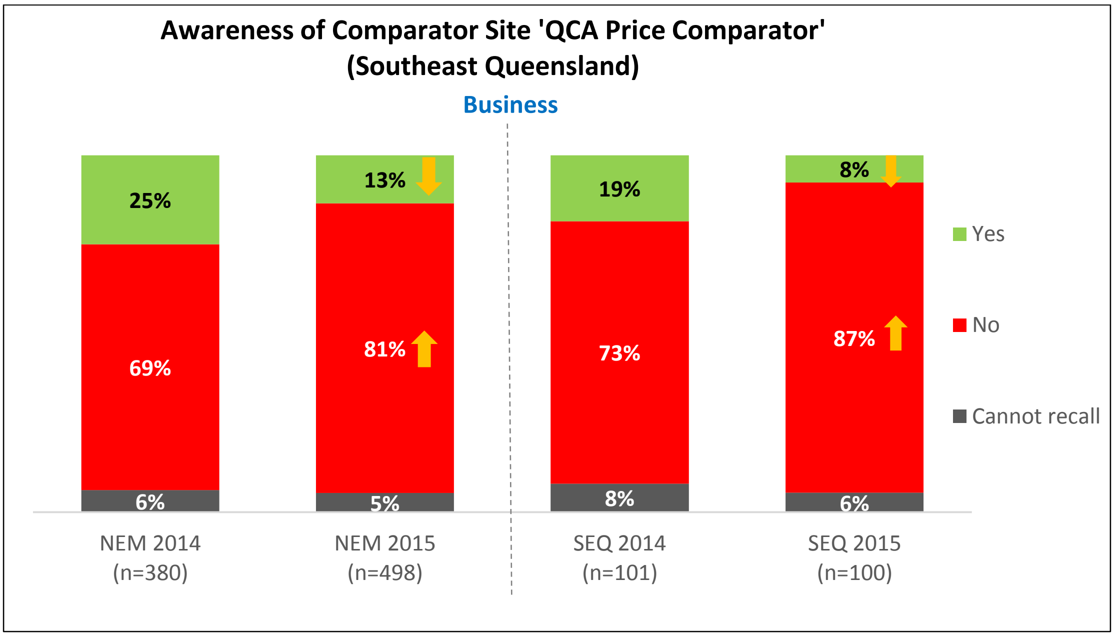


Base: All Respondents

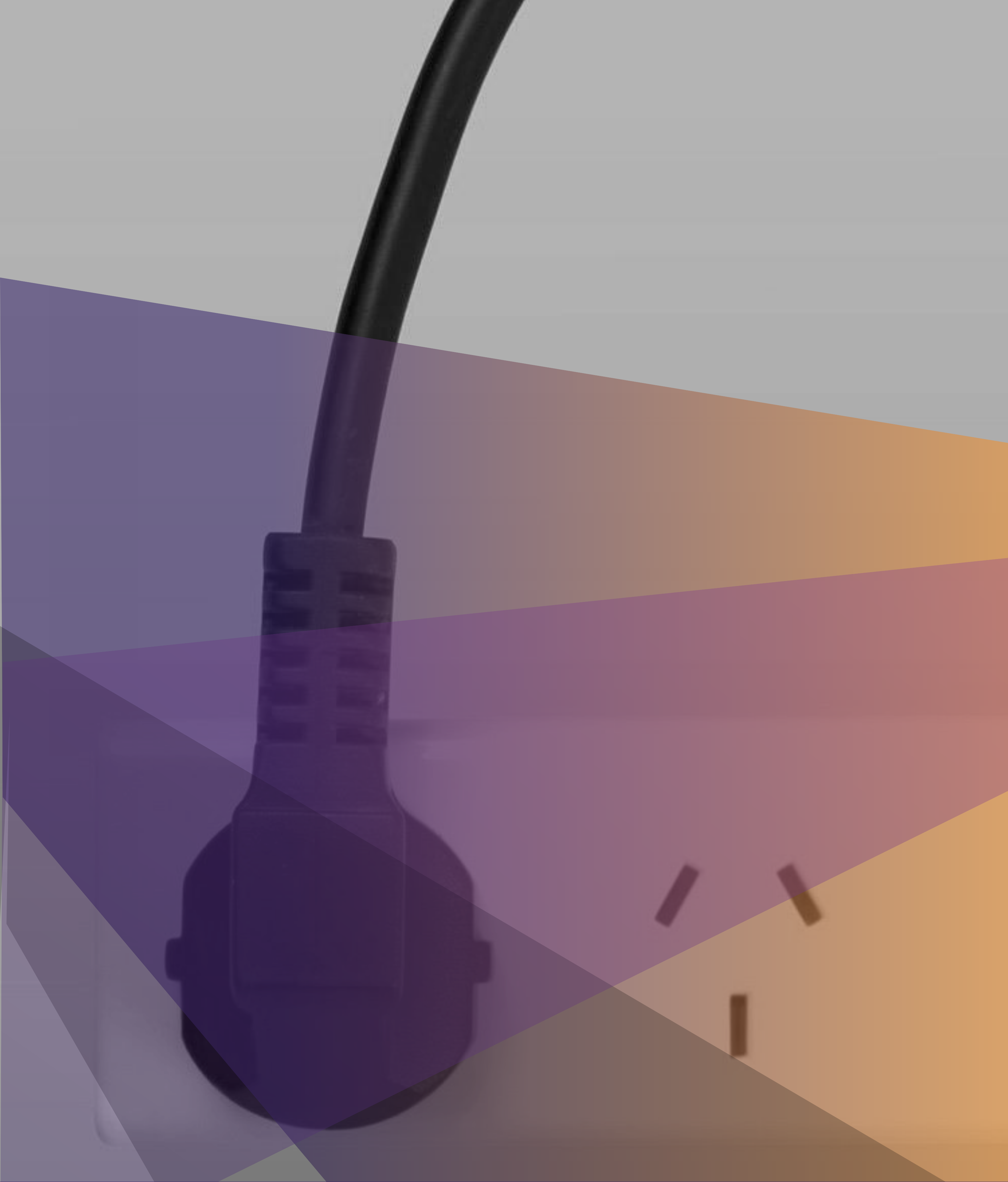
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?



AUSTRALIAN CAPITAL TERRITORY

NEWGATE RESEARCH

5. Australian Capital Territory

Table of Contents

5.1 Executive Summary

Introduction

This chapter outlines Newgate Research's findings from quantitative research conducted among small energy consumers in the Australian Capital Territory (ACT) in February 2015.

The research involved a mix of telephone and online surveys with n=200 residential consumers and n=50 small business consumers. For the purposes of this survey, residential consumers were defined as the person in the household who is the main or joint decision maker when it comes to choosing the energy company. Small business consumers also had to be the main decision maker and, in addition their quarterly electricity bill needed to be less than $6,000. If they had mains connected gas, their quarterly bill needed to be less than $3,750.

The sample breakdowns by methodology and for age and gender are shown in the tables below. In addition to these, we note that the sample also included n=126 residential consumers and n=11 small business consumers who had mains connected gas.

Respondent type by mode (n=)	Residential	Small Business
Online	150	-
Telephone	50	50
Total	**200**	**50**

Age/gender breakdown (residential n=)	Male	Female	Total
18-34	15	14	**29**
35-54	37	48	**85**
55+	55	31	**86**
Total	**107**	**93**	**200**

Further details about the methodology are provided in the Methodology section.

Throughout this chapter, statistically significant differences (95% confidence level) between the 2014 and 2015 results are noted using arrows (↑↓). Where there a differences between individual sub-groups, these are indicated using **red** (meaning significantly lower than other groups) or **blue** font (significantly higher than other groups).

Please note, throughout this chapter the results relating to gas for small business consumers are not shown due to a small sample size (n=11).

Key Findings

There was a significant increase in awareness of being able to choose their energy company in ACT

There was a significant increase in the proportion of residents who were aware they could choose their electricity company (72%, up from 57% in 2014). Although not statistically significant, there was also an increase in the proportion of small business consumers who were aware they could choose their electricity company (73%, up from 63% in 2014).

Among residents, there was also a significant increase in awareness of being able to choose their gas company (54% up from 36% in 2014).

Further supporting this increase in awareness of being able to choose their energy company, there was a significant decline in the proportion of residential consumers who said they had not switched electricity company or plan because *there were no other alternatives* (12% down from 25% in 2014).

Despite the increase in awareness, awareness of being able to choose their energy company in the ACT still remained much lower than the NEM average.

Consumers in ACT were less confident they could choose the right energy option or offer for their household or business compared to those in other NEM jurisdictions.

Engagement with the energy market increased in 2015 with significantly more consumers actively investigating offers and options

In 2015 significantly more residential consumers had actively investigated offers or options that they could potentially switch to (19% residents up from 10% in 2014, and 9% of small business up from 6% in 2014). Despite the increase, the proportion of consumers who actively investigated offers in ACT was significantly lower than the NEM average.

Vulnerable customers were significantly more likely to have actively investigated their options (36% of those experiencing difficulty paying) but this did not translate into higher switching rates.

Despite higher awareness that they could choose an energy provider, an increase in direct approaches from energy companies and an increase in the incidence who actively investigated their options, switching rates have remained steady in the ACT

Three in ten residential consumers surveyed (28%) and around a quarter of small business consumers (26%) had switched their electricity company or plan in the last five years. Just 16% of the residents surveyed had switched their gas company or plan in the past five years. These results were consistent with 2014 and remained significantly lower than the NEM average.

Price related factors remained the main reason for switching energy company or plan

Consistent with all other jurisdictions, price remained the main reason for switching energy company or plan. When prompted with a range of factors that could be considered when deciding whether or not to switch, the most important factors for residents were the discounts offered and the price per unit of energy.

Most consumers in ACT were happy with their decision to switch

The majority of residential consumers who had switched their electricity company or plan agreed that they were happy with their decision to switch (80%) and that they got what they expected after they switched (76%).

Those who were happy with their decision to switch were most likely to feel that way as a result of cheaper prices, discounts and incentives received (64%).

Despite these satisfaction levels, just three in five consumers who switched electricity company or plan agreed that they would recommend switching to their family, friends or colleagues (58%).

Attitudes towards switching or investigating offers remained stable in 2015

When asked about their current intentions in relation to switching, results were similar to findings in 2014. Around one in ten residential consumers (8%) and nearly two in ten small business consumers (17%) indicated they were currently looking for a better deal. Around half of consumers surveyed (54% of residential and small business) were interested but not currently looking for a better deal and around a quarter of consumers (25% of residential, 31% small business) were not interested in switching at all.

Overall levels of satisfaction with the level of market choice in the ACT remained consistent

Around a third of consumers were somewhat or very satisfied with the level of market choice (34% of residents and 33% of small business). Satisfaction in the ACT remained much lower than the NEM average.

The perceived value for money provided by electricity companies in the ACT declined significantly

Ratings of energy companies in the ACT remained fairly stable since 2014 with the exception of the value for money provided by electricity companies. Among residential consumers, this measure declined significantly in 2015 (45% rated seven or more vs. 56% in 2014) and shifted to below the NEM average (54%).

The internet remained the most used information source to help residential consumers switch

In line with other jurisdictions and consistent with results in 2014, the internet was the most used, the most useful and the most preferred method for investigating energy plans and offers and for making the decision to switch.

Residents in the ACT were not as confident they could find the right information to choose a suitable energy plan compared to those in other NEM jurisdictions

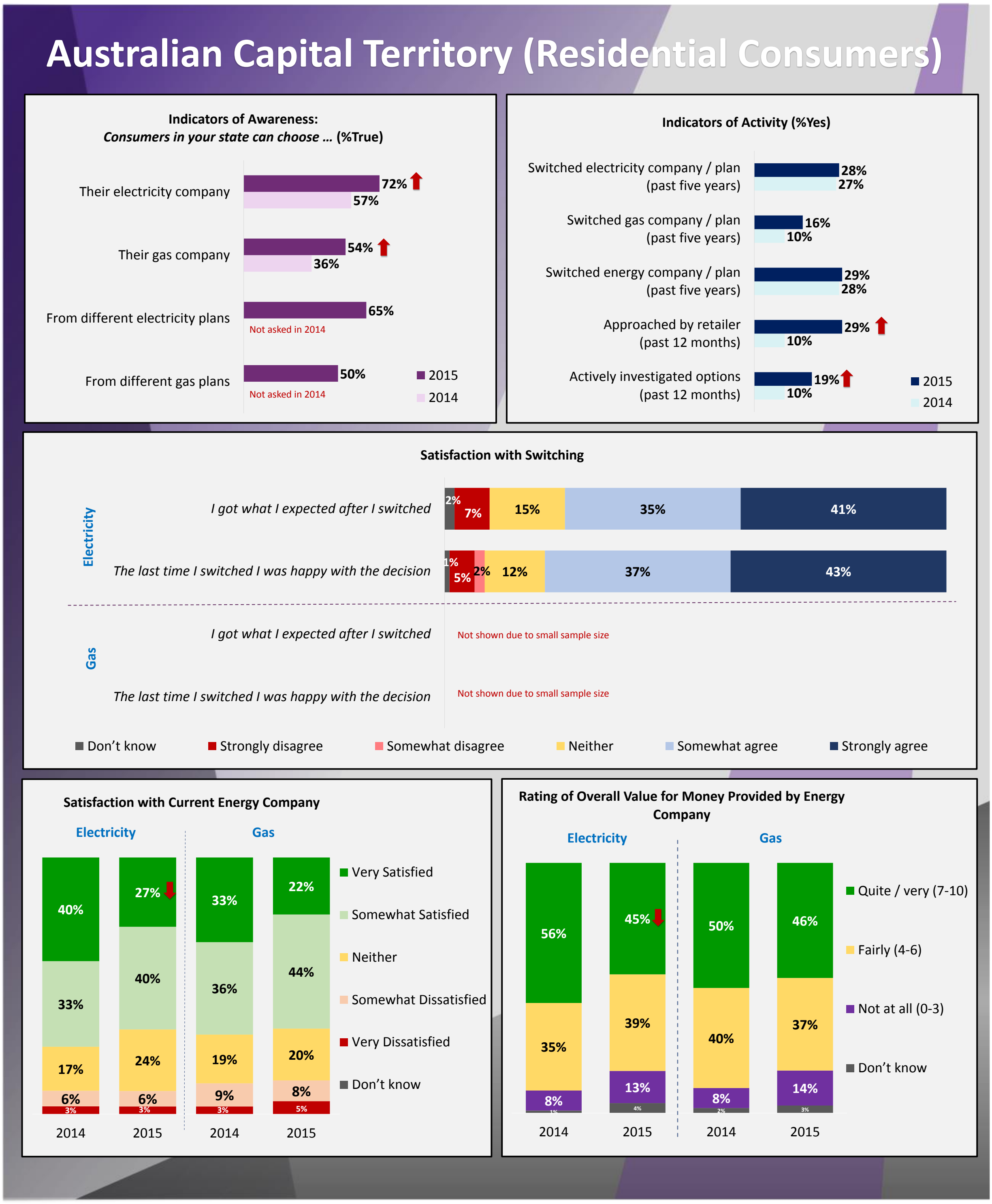
When it came to confidence in finding the right information to choose a suitable energy plan, around two in five residential consumers (38% rating seven or more out of ten) and half of business consumers (48%) were quite or very confident. This result was fairly consistent with the NEM average for small business consumers (45%), however it was significantly lower for residential consumers (54%).

Awareness of comparison websites remained low in 2015

Unprompted awareness of comparison websites among residents and small business consumers was consistent with findings in 2014. The majority (83% of residents and 89% of small business consumers) could not name any comparison sites at all and a further 3% were aware there were comparison sites but could not recall any specific names.

Consistent with 2014 findings, when prompted, less than one in ten residential consumers (7%) and one in ten small business consumers (12%) had heard of the *energymadeeasy* website. Without prompting, just 1% of residential consumers had heard of it.

Snapshot of Results



5.2 Key Findings in Detail

5.2.1 Customer Awareness & Understanding

Summary of Findings

The ACT study showed a significant increase in awareness that consumers could choose their energy company.

There was a significant increase in the proportion of residents who were aware they could choose their electricity company (72%, up from 57% in 2014). Although not statistically significant, there was also an increase in the proportion of small business consumers who were aware they could choose their electricity company (73%, up from 63% in 2014).

Among residents, there was also a significant increase in awareness of being able to choose their gas company (54% up from 36% in 2014).

Further, there was a significant decline in the proportion of residential consumers who said they did not switch or investigate other offers because *there were no other alternatives* (12% down from 25% in 2014).

Despite the increases, awareness of being able to choose their energy company in the ACT still remained far below the NEM average.

Around two thirds of residents (65%) and seven in ten small business consumers (71%) were aware that they could choose from a range of different electricity plans with different price structures, contract lengths and terms. Around half of residents with mains connected gas were aware they could choose from a range of different gas plans (50%).

In the ACT there are four electricity brands to choose from and three gas brands. On average, residents thought there were about three electricity brands to choose from in ACT and between two or three gas brands – this was consistent with 2014..

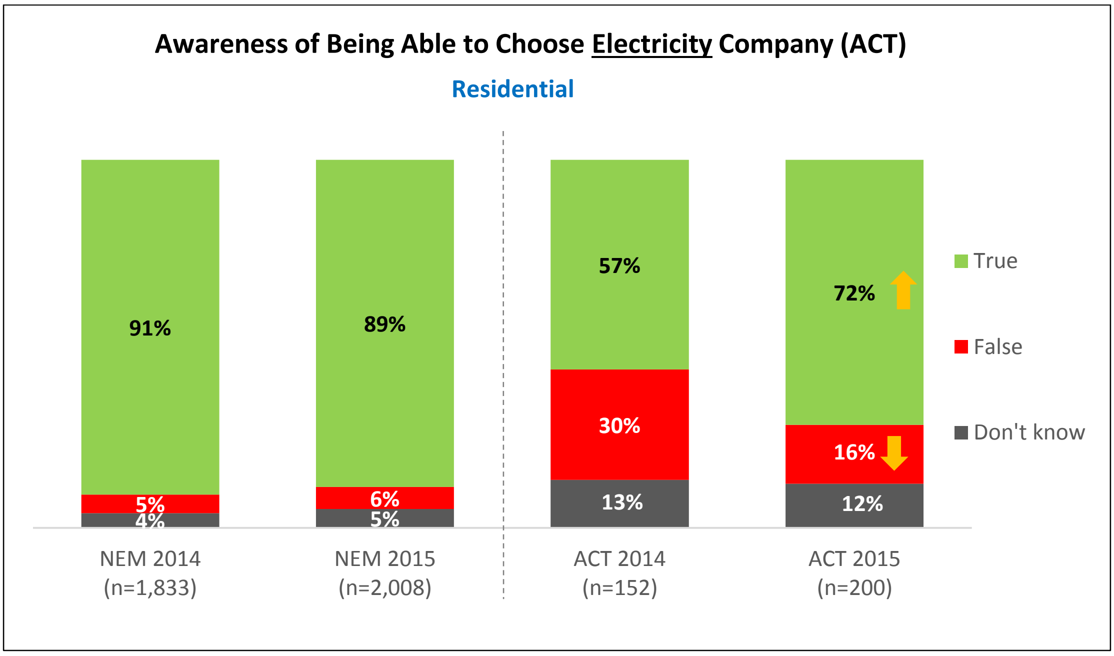
Consumers in the ACT were far less confident they could choose the right energy option or offer for their household or business compared to other NEM jurisdictions. Just four in ten residents (38% compared with 56% across the NEM) and a third of small business consumers (32% compared with 44% across the NEM) rated their confidence as seven or more out of ten. Four in ten consumers were only fairly confident, rating between four and six out of ten (39% of residents, 38% of small business).

The following groups of residential consumers had significantly higher confidence levels:

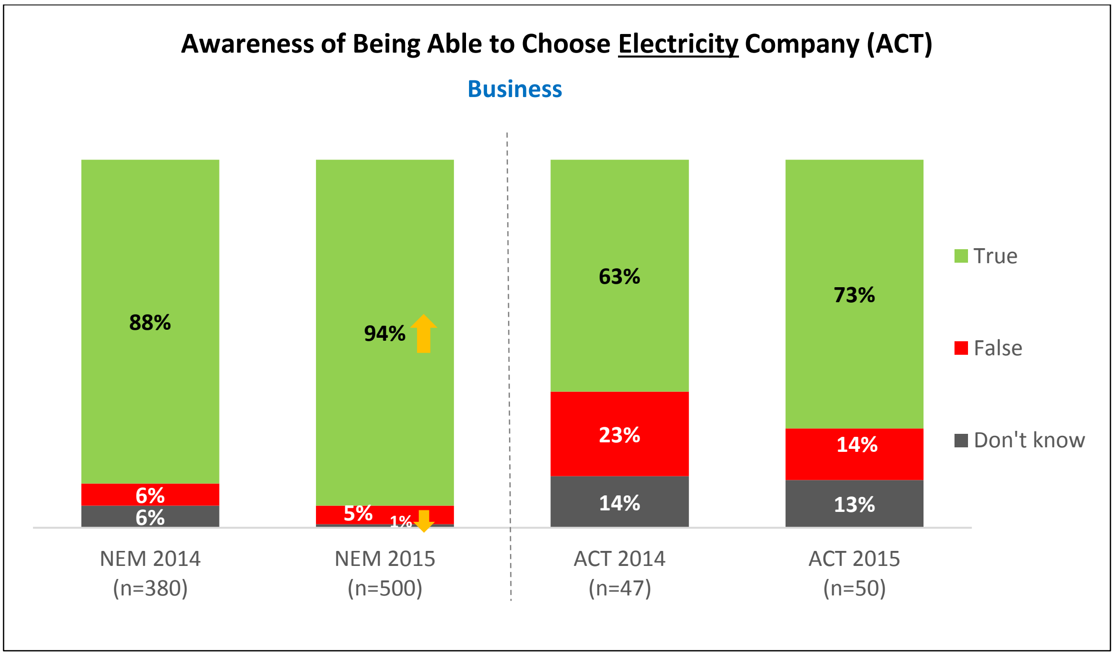
- Those currently receiving a concession or rebate on their energy bill;
- Those with solar panels; and
- Those who had switched in the past five years.

Please note that confidence levels have not been compared to the 2014 results due to a change in the question wording in the 2015 survey.

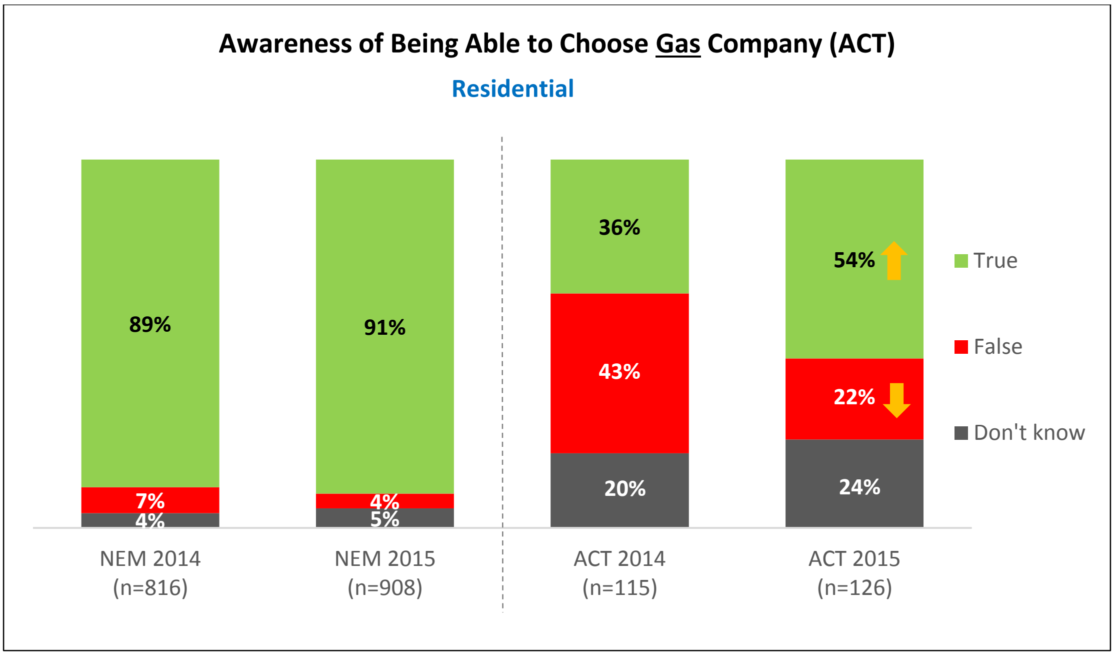
The Results



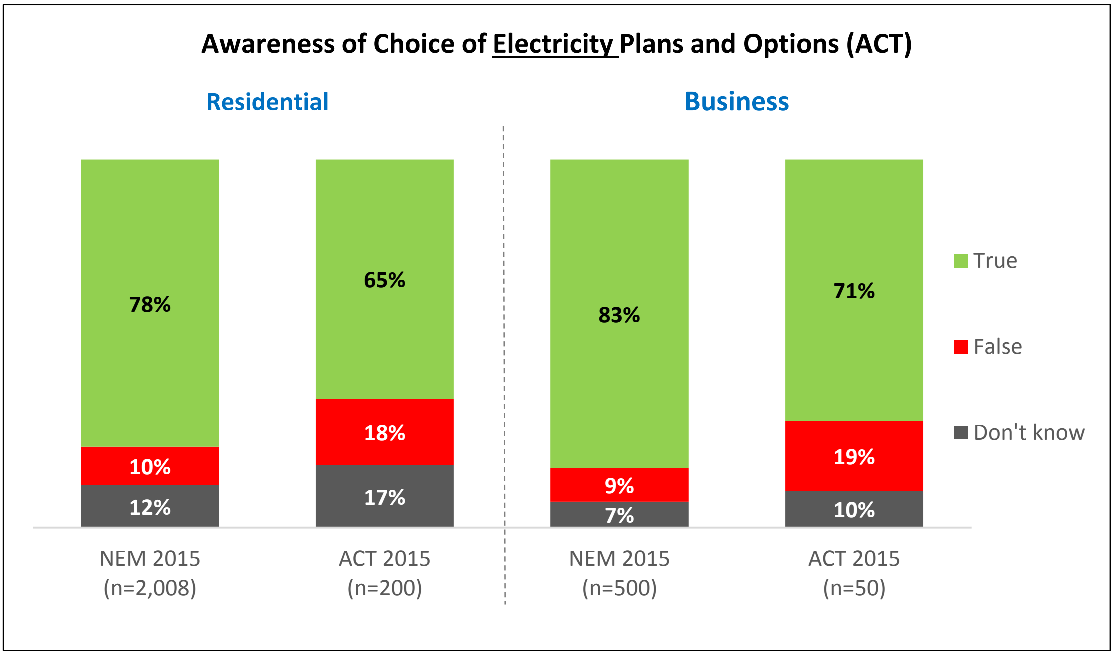
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



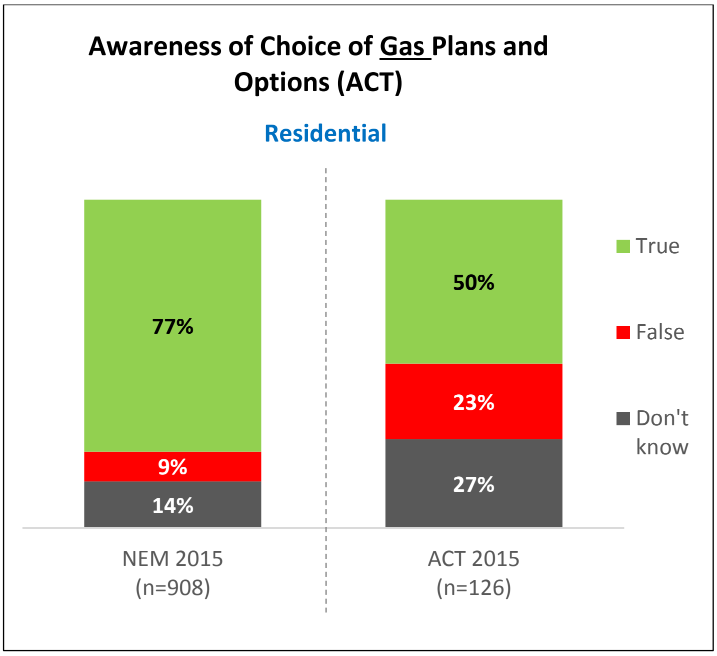
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



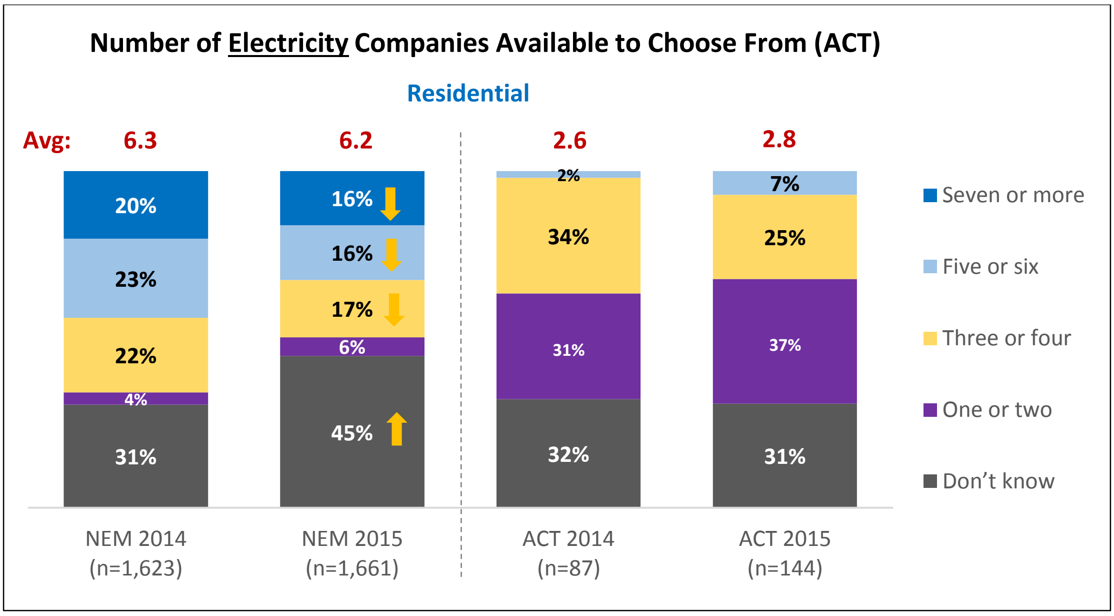
Base: Respondents with mains connected gas. NB. Business results not shown due to small sample size (n=11)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company



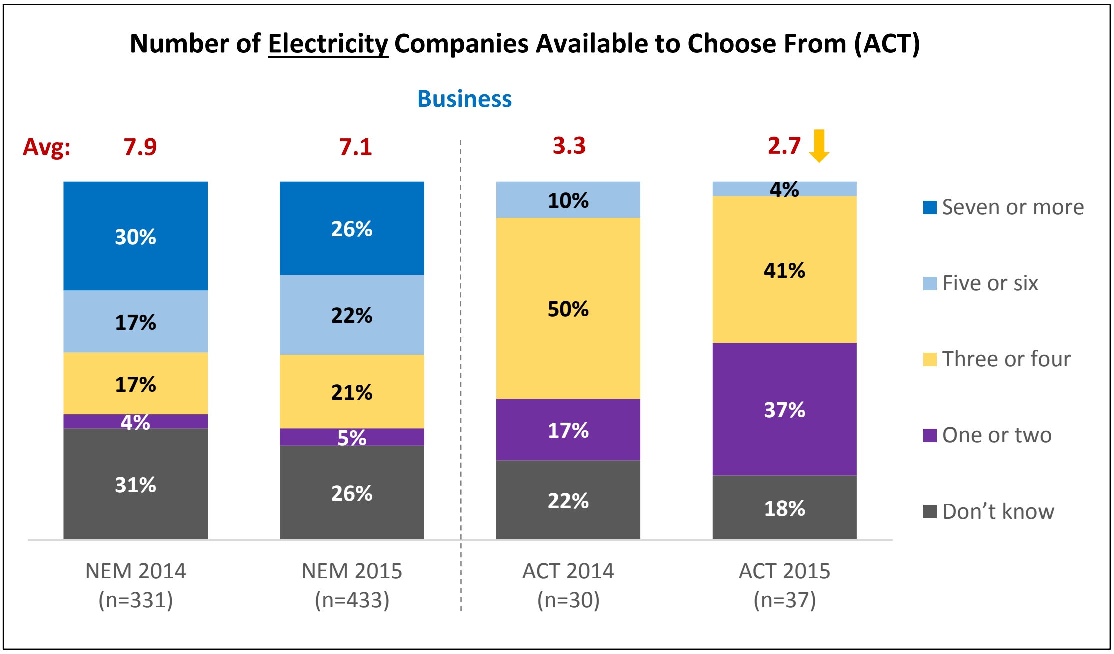
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



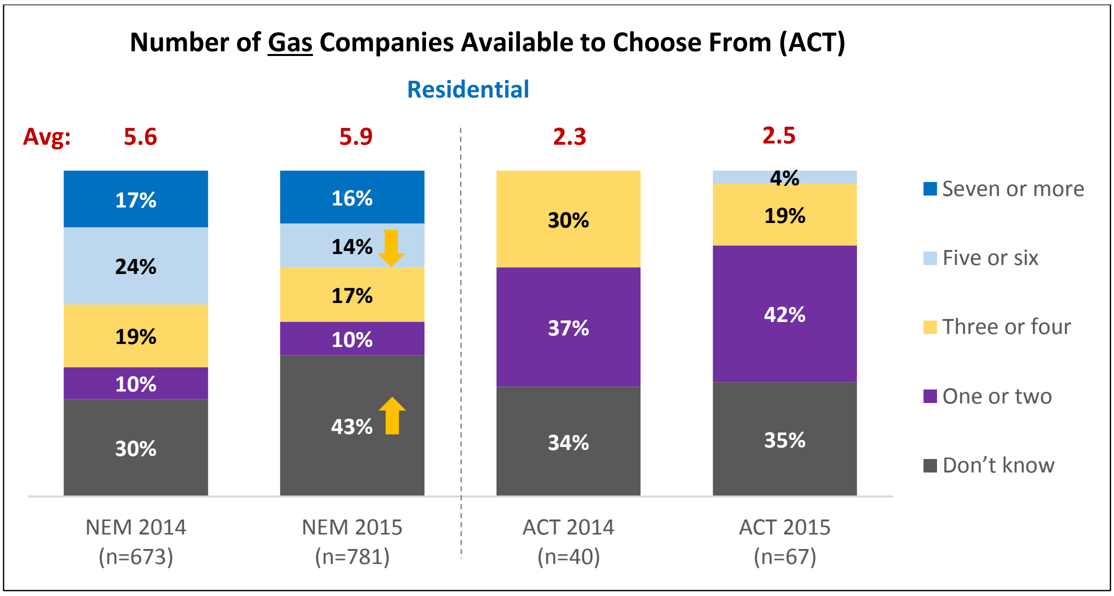
Base: Respondents with mains connected gas. NB. Business results not shown due to small sample size (n=11)
Q13. Please tell me whether you think the following statements are True or False. d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms.
NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



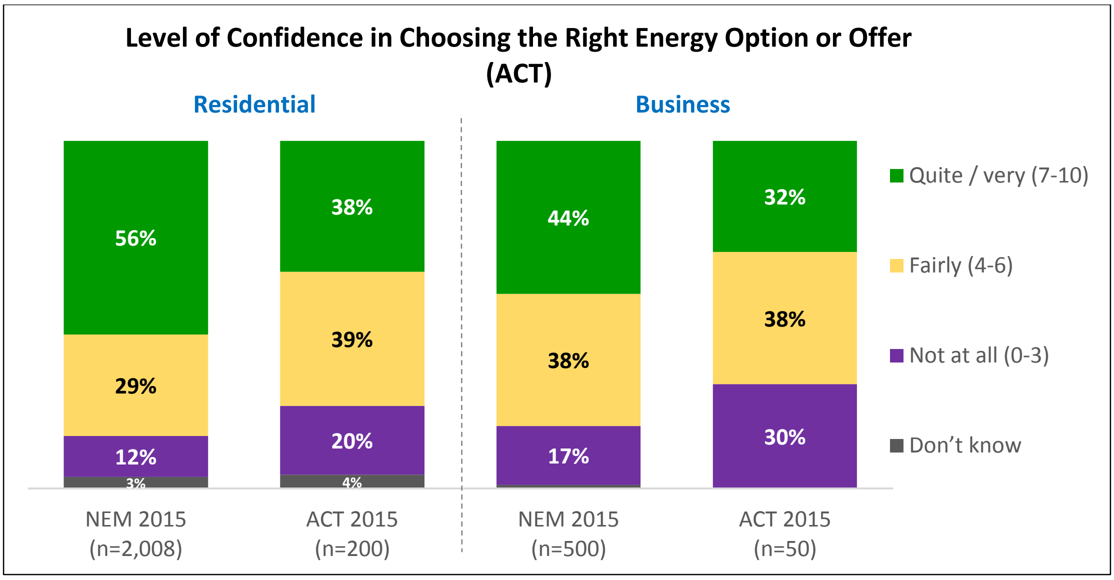
Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: Respondents who say they can choose their electricity company
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: Respondents who say they can choose their gas company. NB. Business results not shown due to small sample size.
Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory?



Base: All Respondents

Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

5.2.2 Market Participation

Summary of Findings

Incidence of Switching or Investigating Offers

To be consistent with the 2014 survey, consumers were asked how many times they had switched their electricity or gas company or plan in the past five years. To allow more granular tracking in future, those who had switched at least once in the past five years were also asked how many times they switched in the past 12 months.

In the ACT around one in ten residential consumers (11%) had changed their electricity or gas company or plan in the past 12 months. This rate was much lower than the NEM average (23% had switched in the past 12 months). Switching rates among small business consumers were also lower than the NEM average with less than one in ten (7%) having switched their electricity company or plan in the past 12 months.

Despite an increase in the number of approaches by an energy company in the past 12 months (29% up from 10% in 2014) and an increase in the proportion who actively investigated their options (19% up from 10% in 2014), switching rates among residents in the past five years remained fairly stable in 2015 (29% had switched energy company or plan in the past five years compared to 28% in the 2014).

Among small business consumers, there was a slight decrease in switching this year (26% had switched their electricity company or plan in the past five years vs. 36% in 2014). This decrease may have been a result of a significant decrease in direct approaches by energy companies (18%, down from 41% in 2014).

When compared with the NEM, switching rates in the past five years were considerably lower in the ACT.

The following types of residential consumers were significantly more likely to have switched electricity or gas company or plan in the past five years:

- Those who had been approached by an energy company; and
- Those who had actively investigated offers.

Further, those aged 18 to 34 years were significantly more likely to have switched energy company or plan in the past 12 months.

Motivations for Switching

When asked why they switched their electricity company or plan, price related factors were most commonly mentioned (48% of residential respondents mentioned this unprompted).

When prompted with a range of factors that could be considered when deciding whether or not to switch, the most important factors for residents were the discounts offered and the price per unit of energy. Contract duration, being locked into a contract and termination fees were ranked as lower level priorities. Interestingly, consumers in the ACT thought the availability of green energy plans was more important (22% rated it at 10 out of 10) than consumers in other NEM jurisdictions (12%), although it was still ranked as a lower level priority overall.

For consumers with solar panels, the solar feed-in tariff was the highest level priority (50% rated the importance of this as 10 out of 10, and 83% rated it 8 or 9 out of 10).

Satisfaction with Switching

The majority of residential consumers who had switched their electricity company or plan agreed that they were happy with their decision to switch (80%) and that they got what they expected after they switched (76%).

Those who were happy with their decision to switch were most likely to feel that way as a result of cheaper prices, discounts and incentives received (64%).

Despite these satisfaction levels, just three in five consumers who switched electricity company or plan agreed that they would recommend switching to their family, friends or colleagues (58%). As with other NEM jurisdictions, consumers who agreed they got what they expected and were happy with their decision to switch were significantly more likely to recommend switching compared to those who were not as satisfied with the outcomes.

When it came to the ease of comparing offers when deciding whether or not to switch electricity company or plan, just over half of residential consumers (54%) found it fairly or very easy to compare electricity offers and options. However, compared with the ease of comparing offers for a range of other services including home or car insurance, banking or communications, electricity was ranked lowest among residential consumers.

Barriers to Investigating Offers or Switching

Among residential consumers who had not investigated options nor switched provider or plan, the main reasons given were that they were happy with their current retailer or arrangement (21%) or they were too busy or could not be bothered (21%). These barriers were fairly consistent with those mentioned in 2014.

Among business consumers who had not investigated options nor switched provider or plan, the main reasons given were that they were too busy or could not be bothered (31%) and they were happy with their current retailer or arrangements (22%).

Due to a small sample size of consumers who investigated their options but didn't switch (n=16 residents, n=1 small business), the reasons for not switching are not shown in this report.

Switching Intentions and Attitudes

When asked about their current intentions in relation to switching, results were similar to findings in 2014:

- Around one in ten residential consumers (8%) and nearly two in ten small business consumers (17% up slightly, though not significantly, from 4% in 2014) indicated they were currently looking for a better deal.
- Around half of consumers surveyed (54% of both residential and small business) were interested but not currently looking for a better deal;
- A small number of consumers (2% residential, 3% small business consumers) indicated they had recently switched and were not interested in looking for a while (new response option in 2015); and
- Around a quarter of consumers (25% of residential, 31% small business) were not interested in switching at all.

The following types of residential consumers were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal:

- Those with mains connected gas; and
- Those currently experiencing financial difficulty paying their electricity or gas bill.

Residential consumers who were not interested in switching were more likely to:

- Be aged 55 years or over; and
- Had not investigated offers and options.

In order to seriously consider switching their company or plan, residents wanted to save an average of $234 per year on their electricity bill and $214 on their gas bill. This was in line with NEM averages. Small business consumers wanted to save about $956 on their electricity bill in order to consider switching - this was higher than the NEM average ($609). Consistent with other NEM jurisdictions, those with higher energy bills wanted to see a bigger saving before they considered switching.

Attitudes towards switching and investigating offers in the ACT were fairly consistent with those found in other NEM jurisdictions. The strongest agreement levels were evident for the statements: *I would switch my energy company if I was not satisfied with my current company* (77% residential, 85% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (71% residential, 61% small business).

Further analysis showed the following attitudinal differences among residential consumers:

- Those who had not actively investigated different energy offers or plans were significantly more likely to agree with the following statements compared to those who had not:
    - *I'm concerned that if I switch there will be hidden fees and charges;*
    - *I don't trust energy companies who promise a better deal; and*
    - *I can't be bothered looking for a better deal.*

  They were significantly less likely to agree that they would switch if they were not satisfied with their current company.
- Those who had switched in the past five years were significantly less likely to agree with the following statements compared to those who had not:
    - *The amount of money I could save is not worth the time and effort;*
    - *It's too complicated to try and compare the various options and offers; and*
    - *I can't be bothered looking for a better deal.*
- Those with solar panels were significantly less likely to agree that the amount they could save is not worth the time and effort.

Vulnerable Consumers

In the ACT, those experiencing difficulty paying their energy bills were more likely to have actively investigated their options and were more interested in looking for a better deal but this did not result in higher switching rates among this group. This trend was also evident in other jurisdictions.

The Results

Incidence of Switching or Investigating Offers

In the Last Five Years

Provider (% switched at least once)	Residential			
	NEM		ACT	
	2014 (n=1,833)	2015 (n=2,008)	2014 (n=152)	2015 (n=200)
Electricity Company	48%	39% ↓	16%	15%
Electricity Plan	39%	31% ↓	21%	17%
TOTAL Electricity	**60%**	**50% ↓**	**27%**	**28%**
Gas Company	40%	35% ↓	9%	10%
Gas Plan	30%	24% ↓	8%	9%
TOTAL Gas	**49%**	**40% ↓**	**10%**	**16%**
TOTAL Electricity or Gas	**61%**	**51% ↓**	**28%**	**29%**
Car Insurance	37%	35%	31%	36%
Mobile	32%	31%	38%	37%
Internet	30%	29%	35%	35%
Home Insurance	22%	26% ↑	17%	27%
Home Phone	22%	20%	24%	24%
Banking	18%	19%	16%	19%
Health Insurance	13%	16%	10%	15%

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

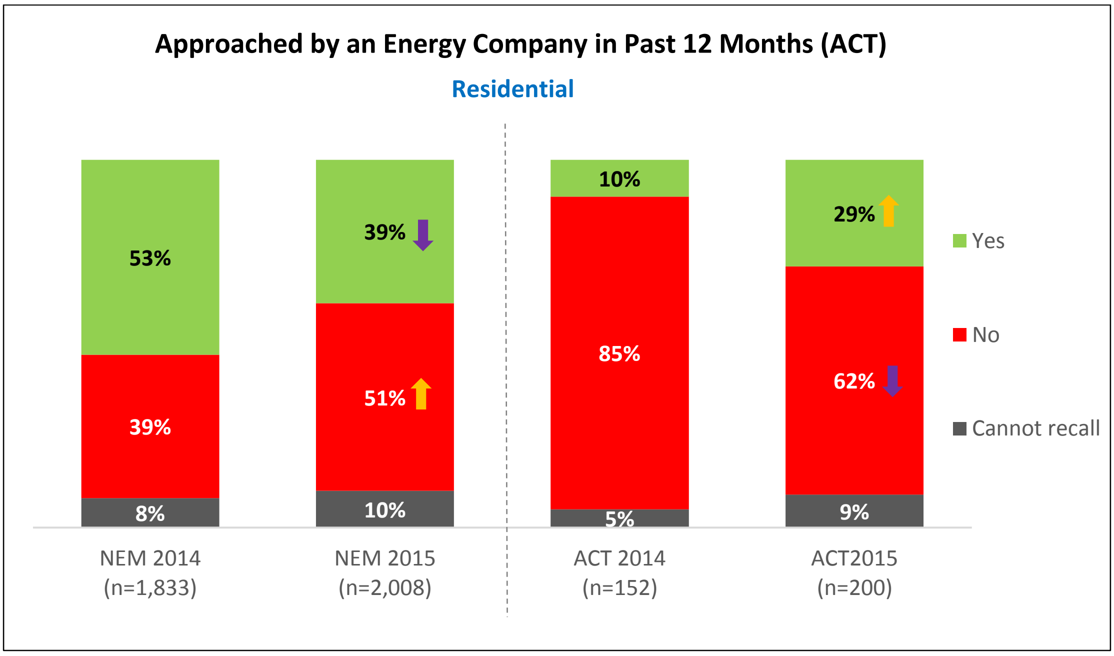
Provider (% switched at least once)	Business			
	NEM		ACT	
	2014 (n=380)	2015 (n=500)	2014 (n=47)	2015 (n=50)
Electricity Company	47%	44%	23%	9%
Electricity Plan	39%	33%	26%	24%
TOTAL Electricity	**56%**	**55%**	**36%**	**26%**
Gas Company	46%	19%	Not shown due to small sample size (n=11)	
Gas Plan	50%	16%		
TOTAL Gas	**56%**	**23%**		
TOTAL Electricity or Gas	**57%**	**56%**		

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?

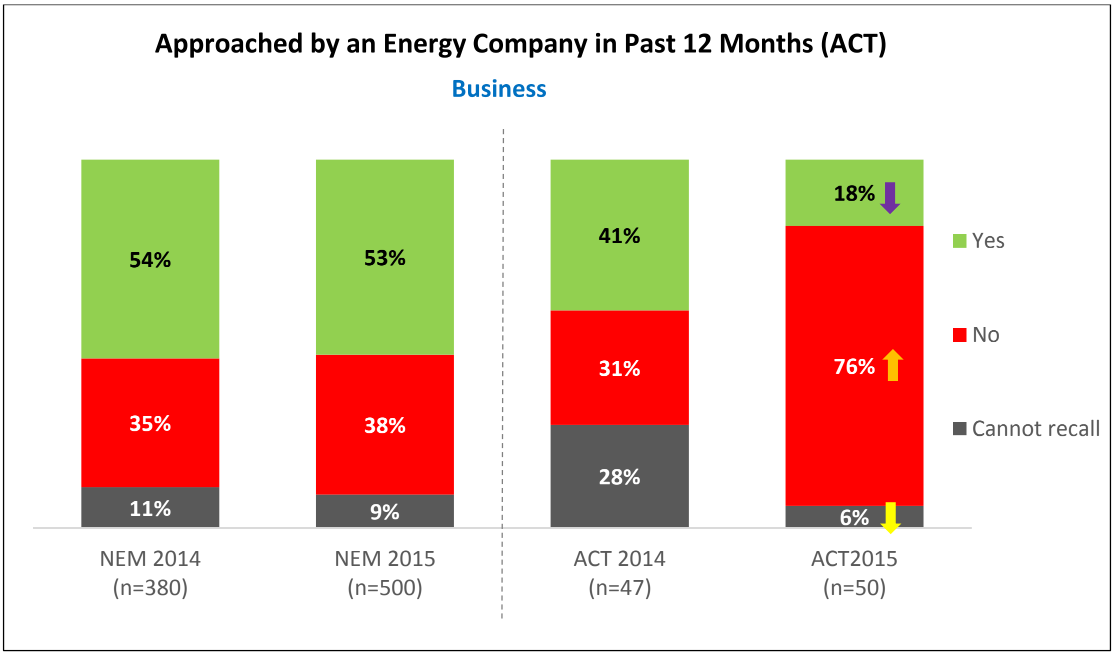
In the last 12 months

Provider (% switched at least once)	Residential		Business	
	NEM (n=2,008)	ACT (n=200)	NEM (n=500)	ACT (n=50)
Electricity Company	14%	6%	18%	2%
Electricity Plan	16%	6%	17%	6%
TOTAL Electricity	**22%**	**11%**	**28%**	**7%**
Gas Company	17%	6%	Not shown due to small sample size (n=11)	
Gas Plan	14%	3%		
TOTAL Gas	**21%**	**7%**		
TOTAL Electricity or Gas	**23%**	**12%**		

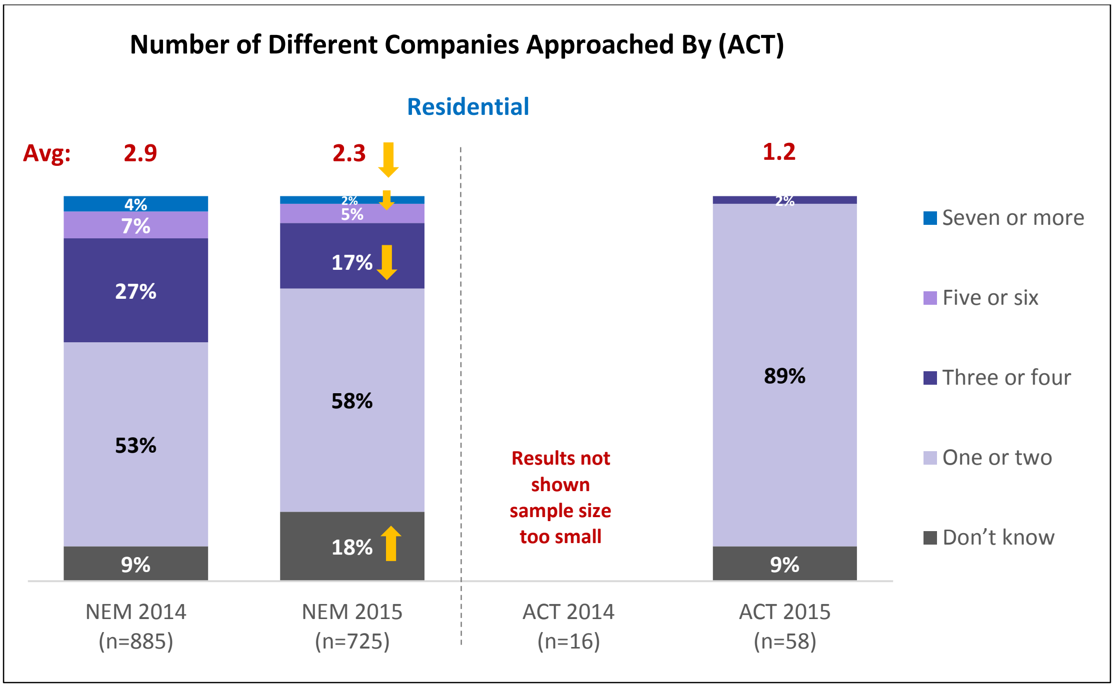
Base: All Respondents
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?



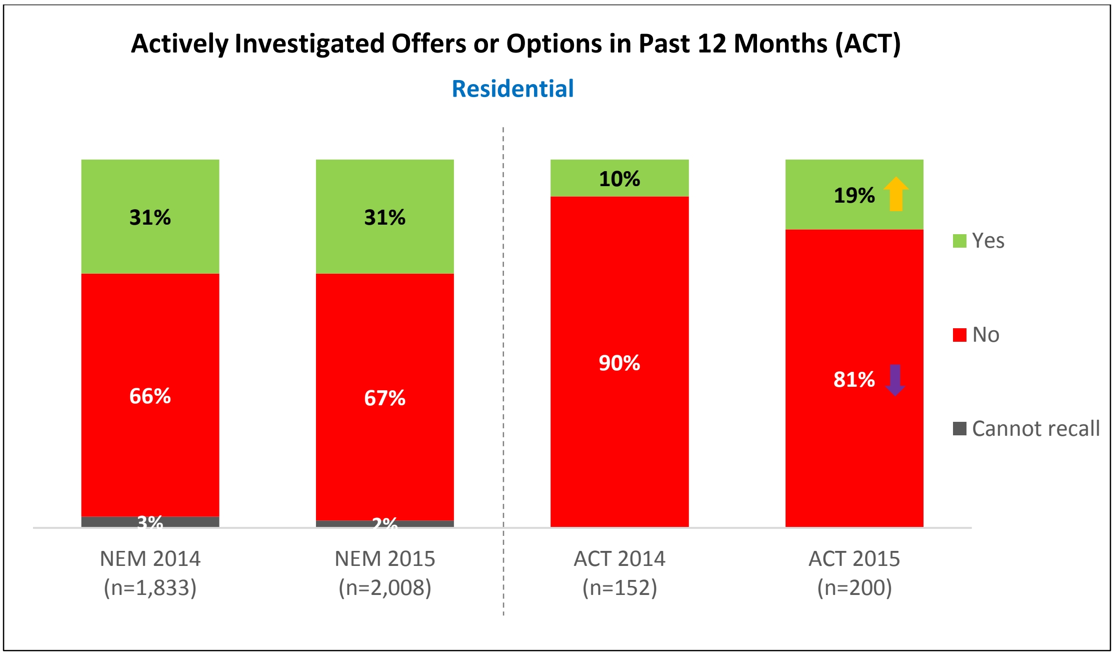
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



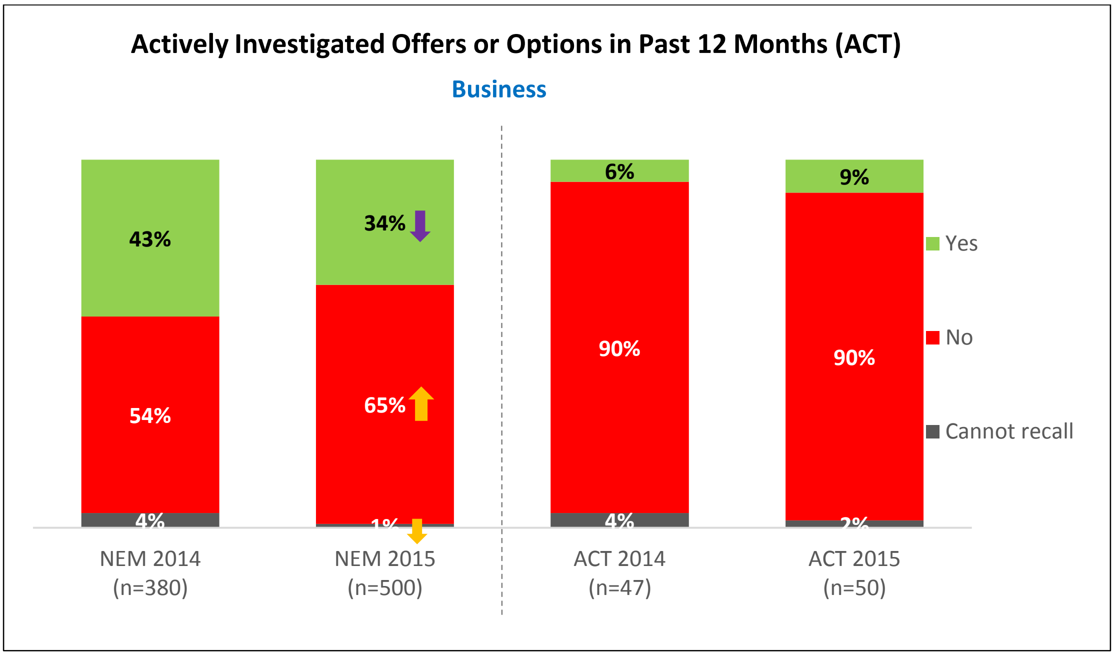
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



Base: Respondents who had been approached by an energy company in the past 12 months. NB. Business results not shown due to sample size (n=10)
Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?

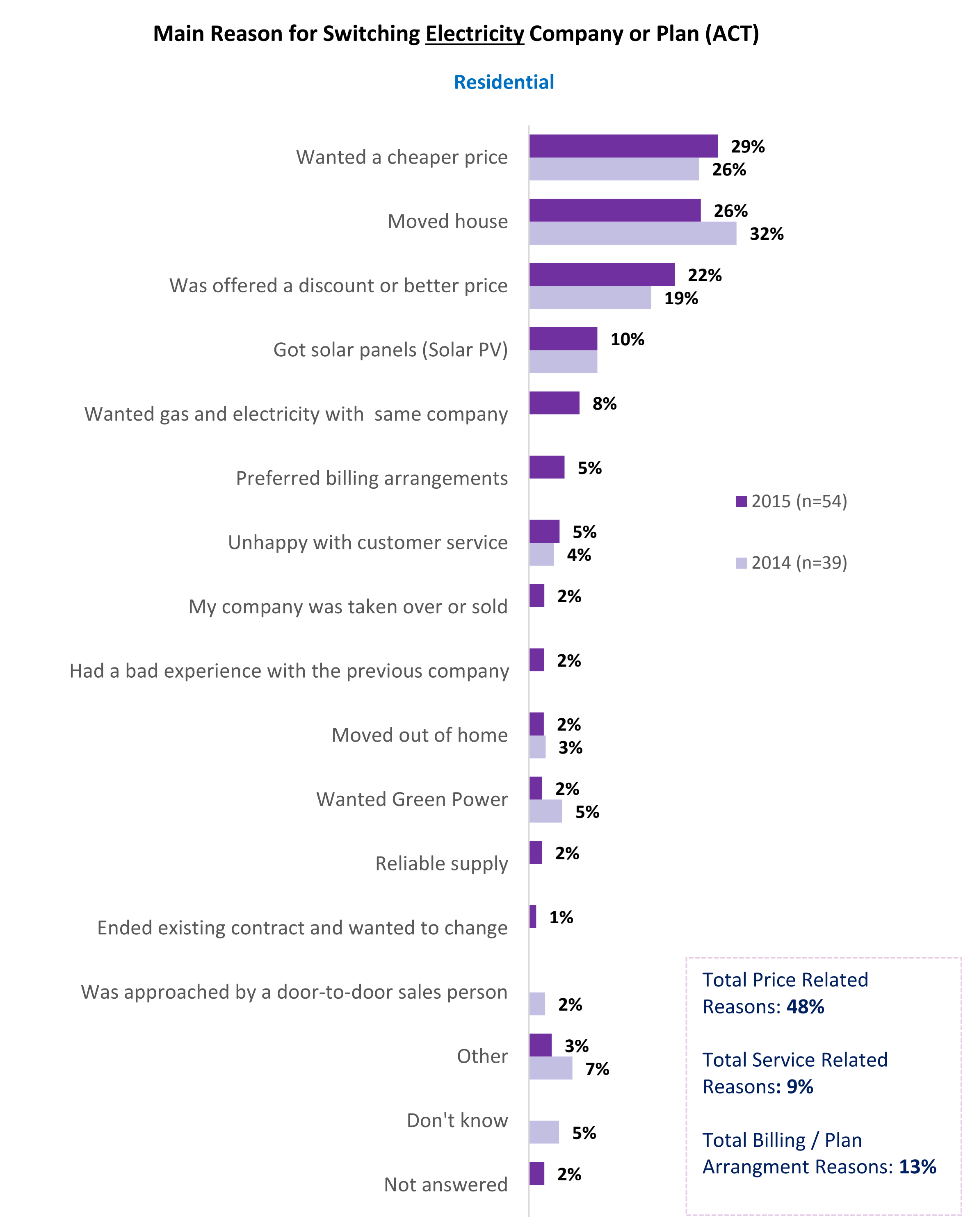


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

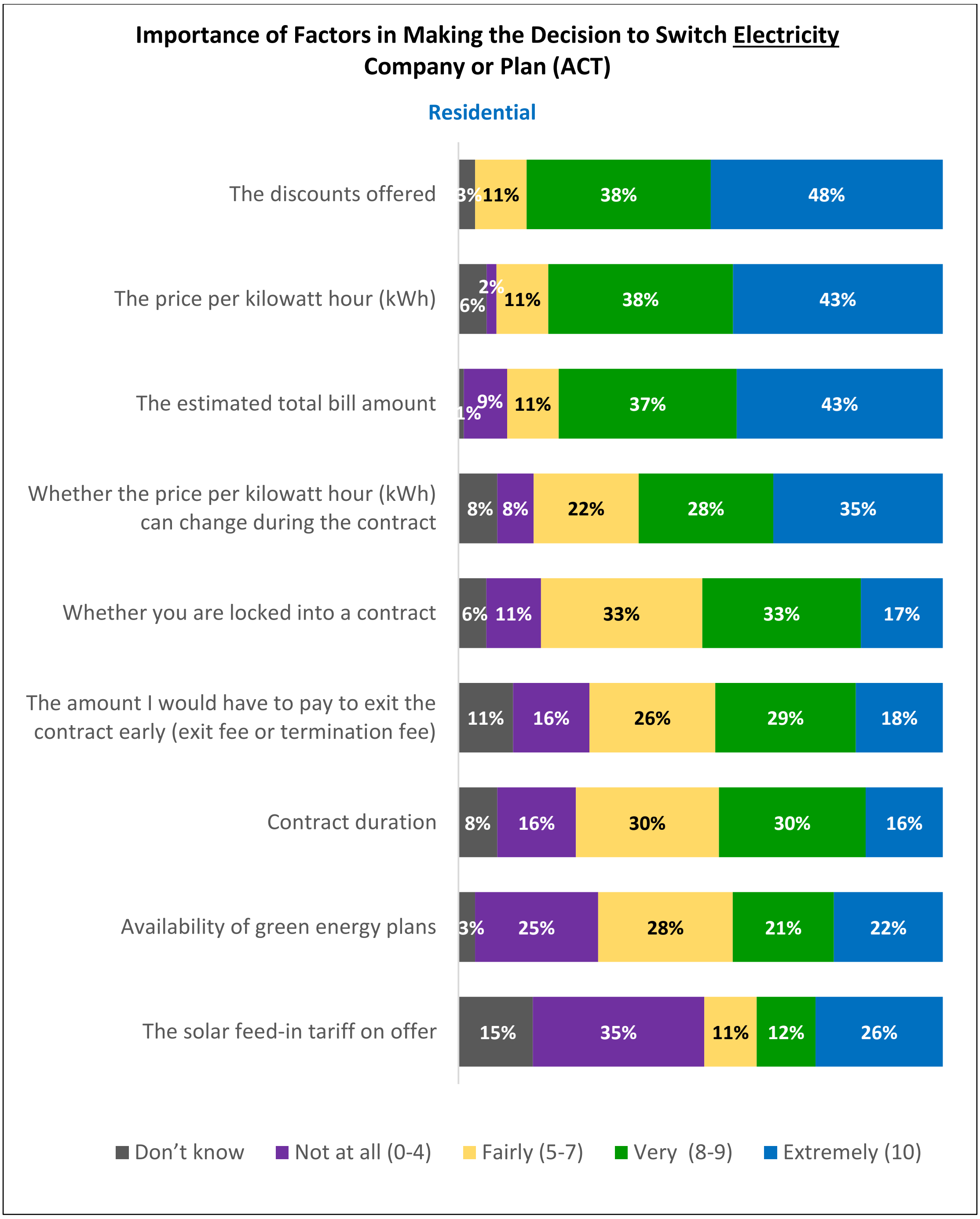


Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Motivations for Switching



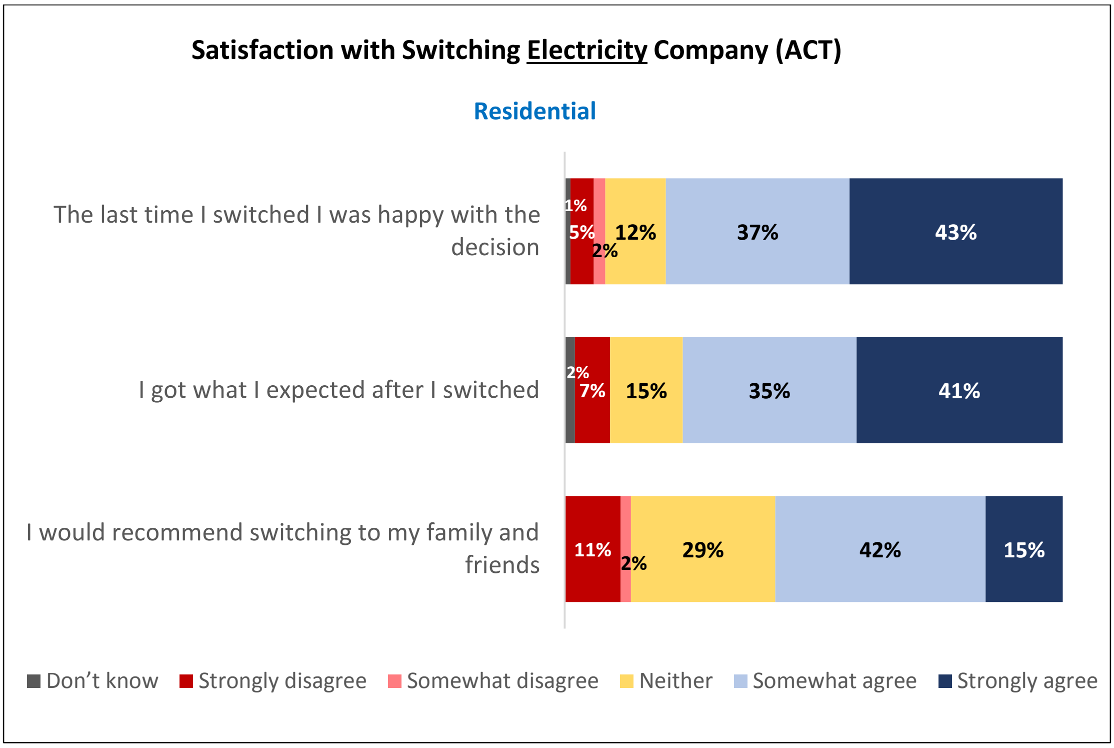
Base: Respondents who switched their electricity company or plan. Business results not shown due to small sample size (n=14)
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? MULTIPLE RESPONSE



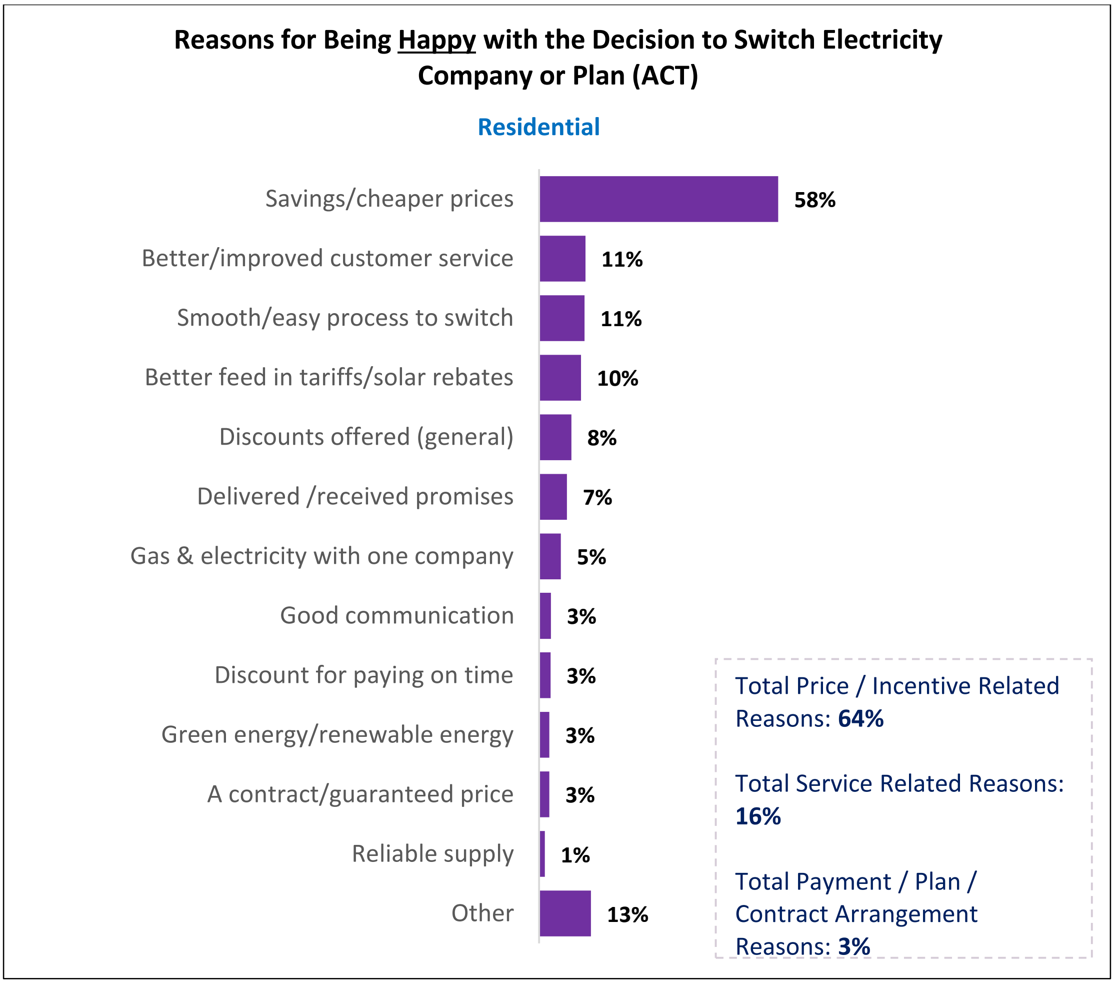
Base: Respondents who switched their electricity company or plan (Residential n=54). Business results not shown due to small sample size (n=14). Gas results not shown due to small sample size (Residents n=20, Business n=0)

Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important?

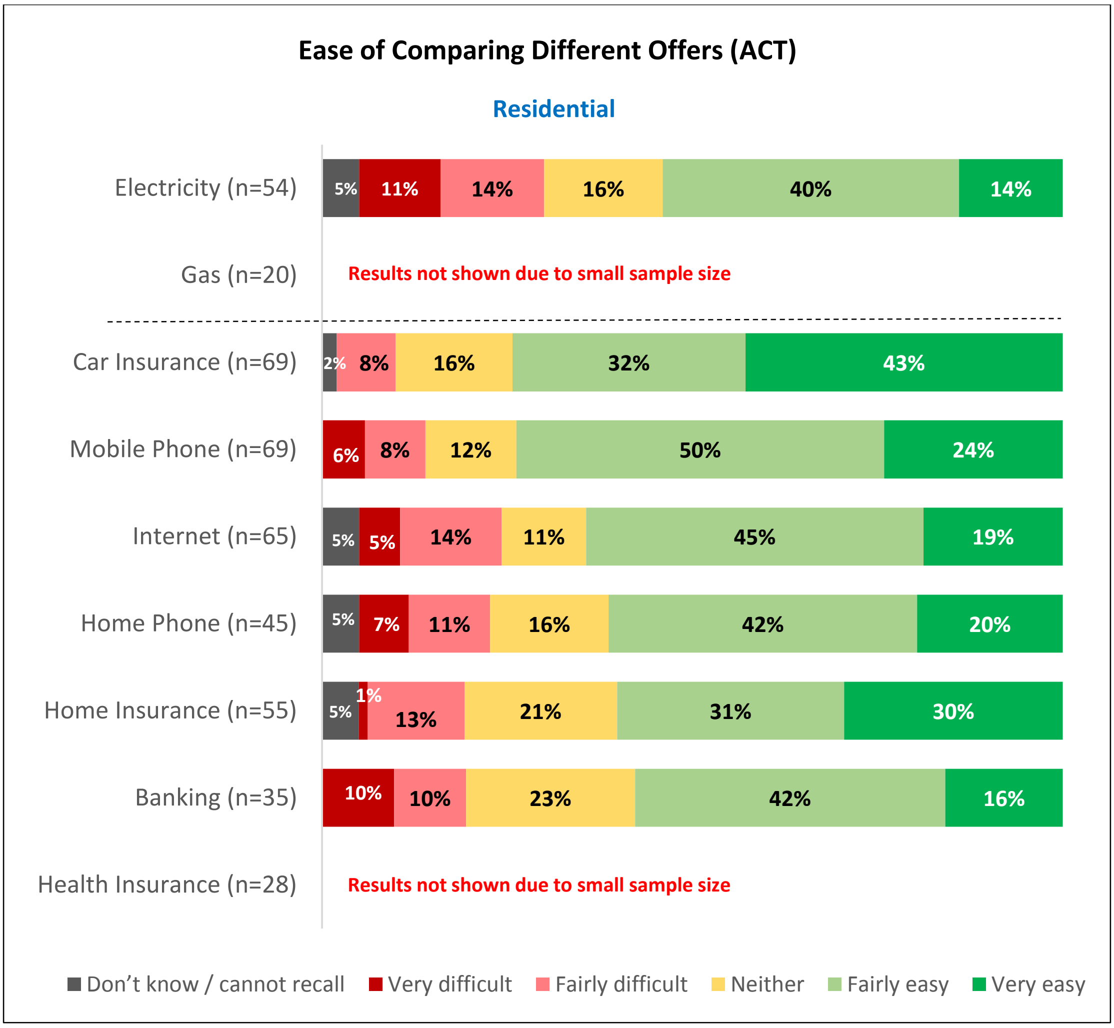
Satisfaction with Switching



Base: Respondents who had switched their electricity company or plan (Residential n=54). NB. Business results not shown due to small sample size (n=14)
Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.

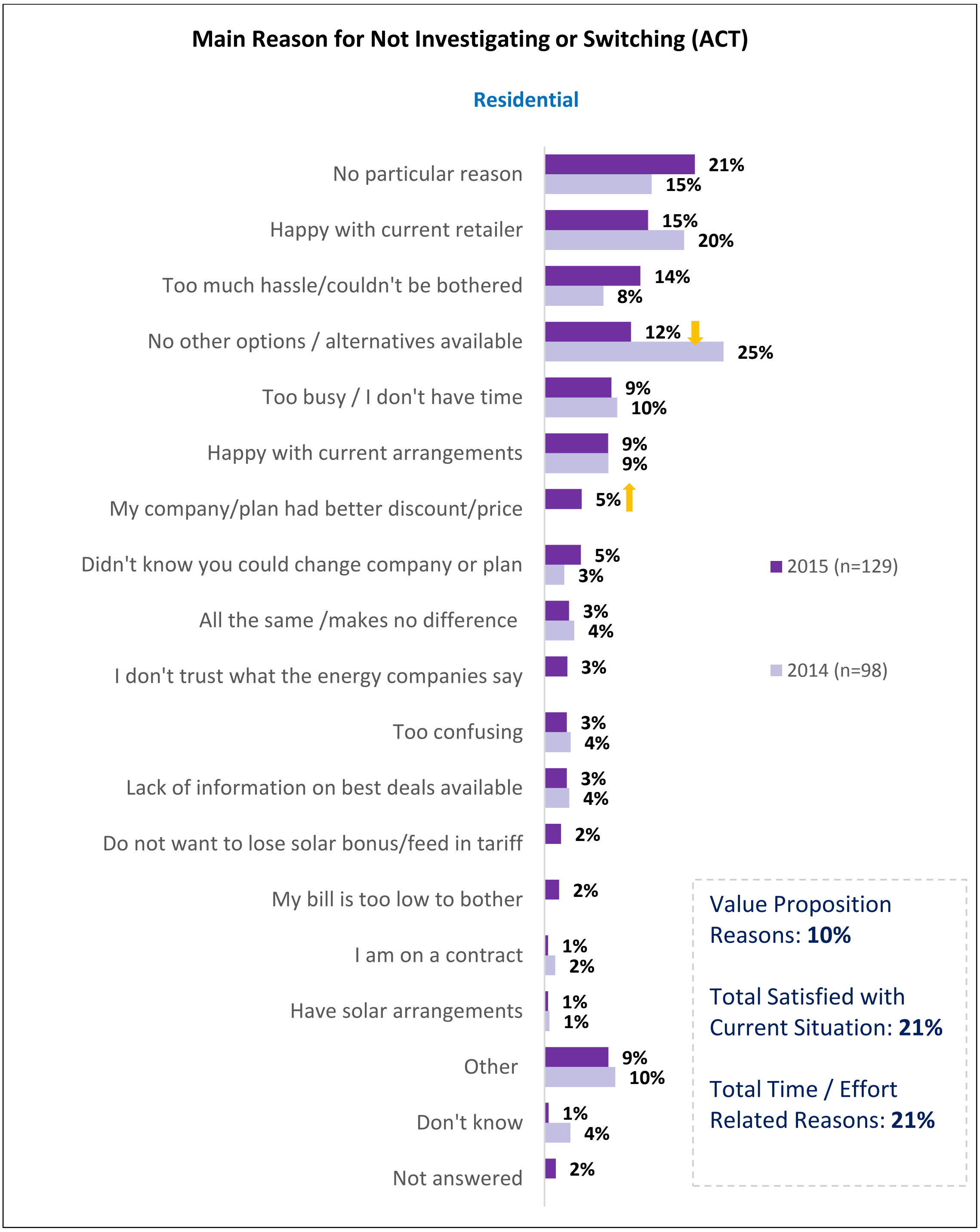


Base: Respondents who agreed they were happy with their decision to switch electricity company or plan (n=42). Business results not shown due to small sample size. Gas results not shown due to small sample size (Residents n=20, Business n=0)
Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE

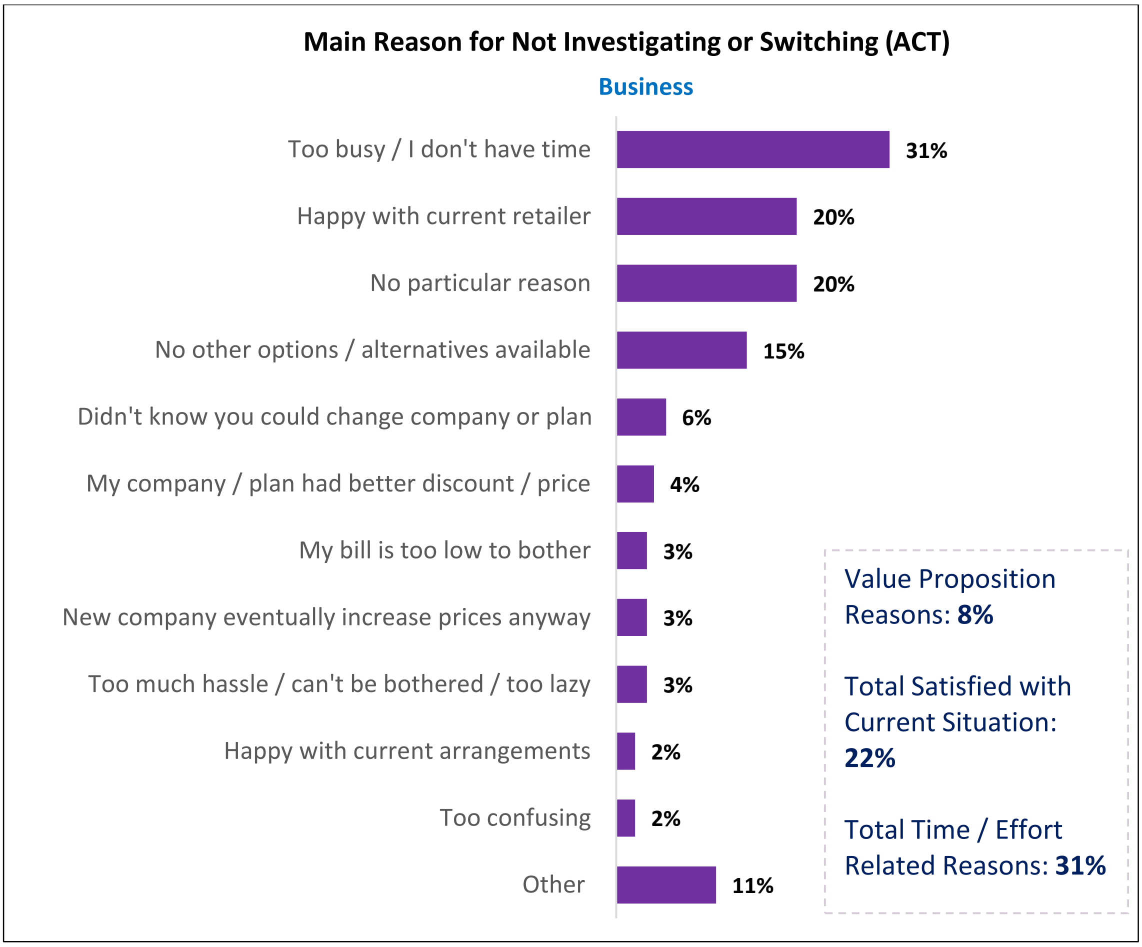


Base: Respondents who switched their company / provider or plan. Business results not shown due to small sample size (n=14)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / D7a. The last time you changed your [INSERT FROM D7] provider, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

__Barriers to Investigating Offers or Switching__

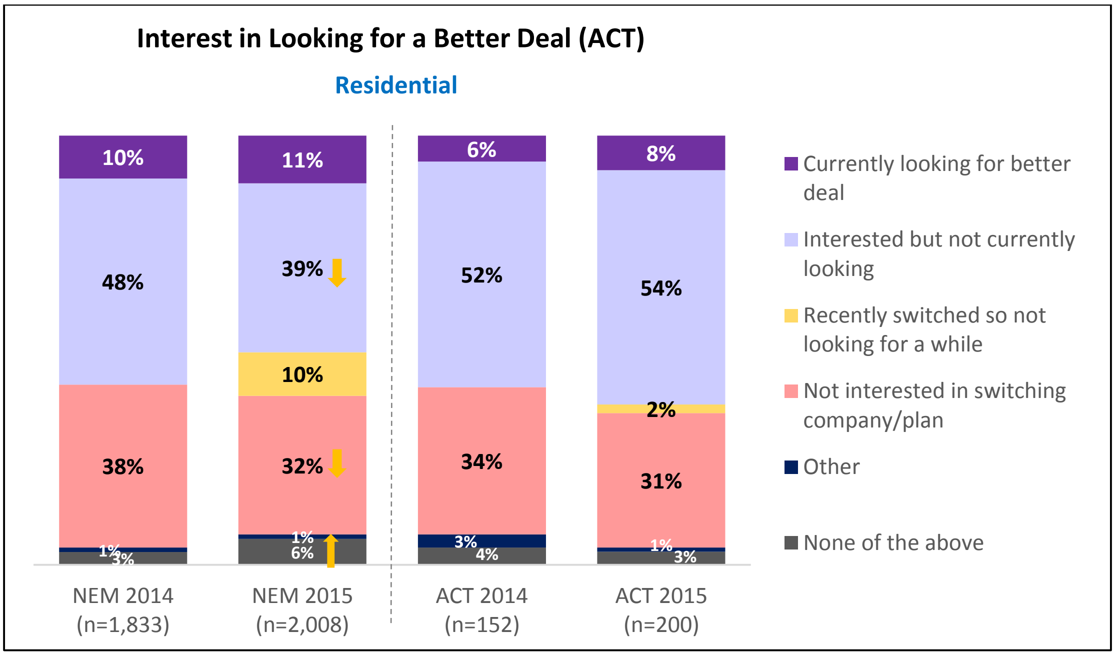


Base: Respondents who had not investigated offers and options or switched in the past 12 months Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

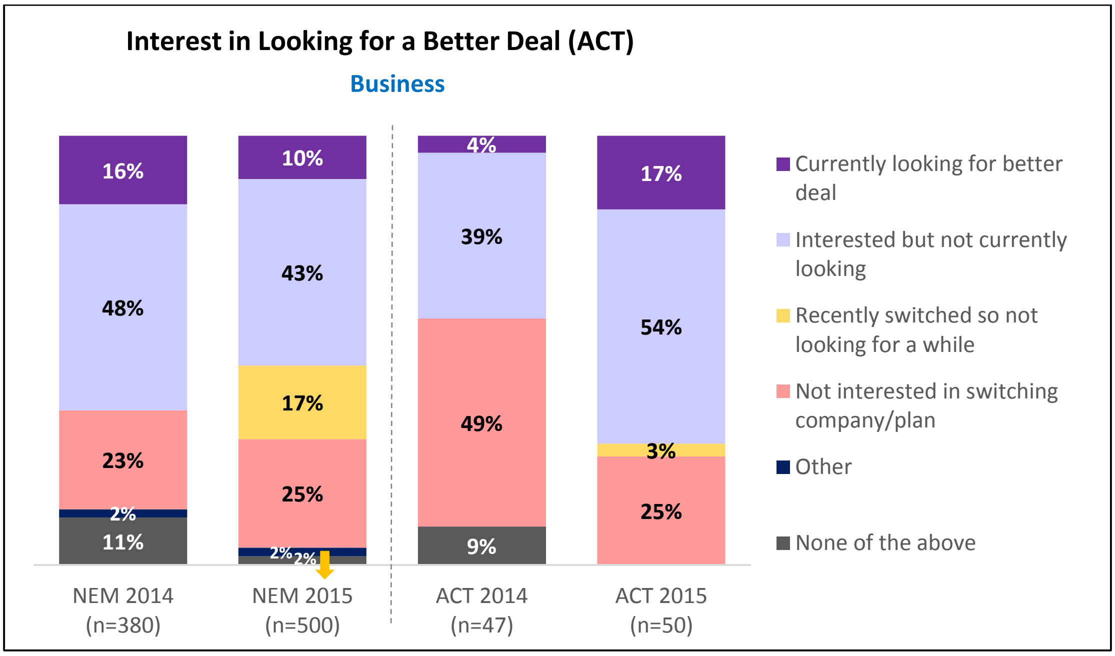


Base: Respondents who had not investigated offers and options or switched in the past 12 months (n=35). NB: 2014 results not shown due to small sample size (n=20)
Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

Switching Intentions and Attitudes



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?



Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=2,008)	ACT (n=200)
Total	**$207**	**$234**
Last Quarterly Electricity Bill: Less than $300	$178	$203
Last Quarterly Electricity Bill: $300-$500	$210	$214
Last Quarterly Electricity Bill: $500 or more	$247	$369

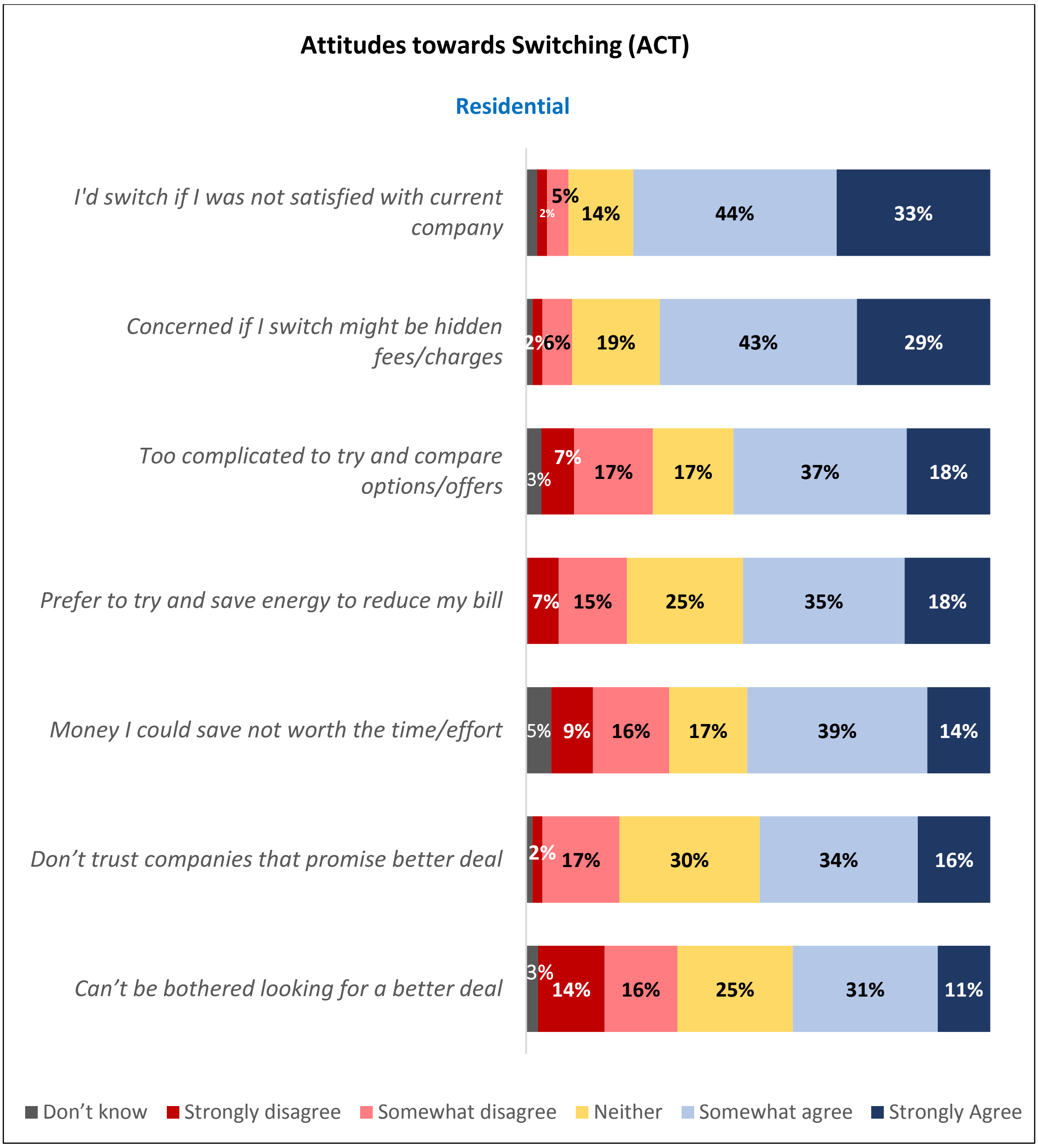
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Business	
	NEM (n=500)	ACT (n=50)
Total	**$609**	**$956**
Last Quarterly Electricity Bill: Less than $500	$257	Sample sizes too small to show breakdown
Last Quarterly Electricity Bill: $500-$999	$462	
Last Quarterly Electricity Bill: $1,000 or more	$1,117	

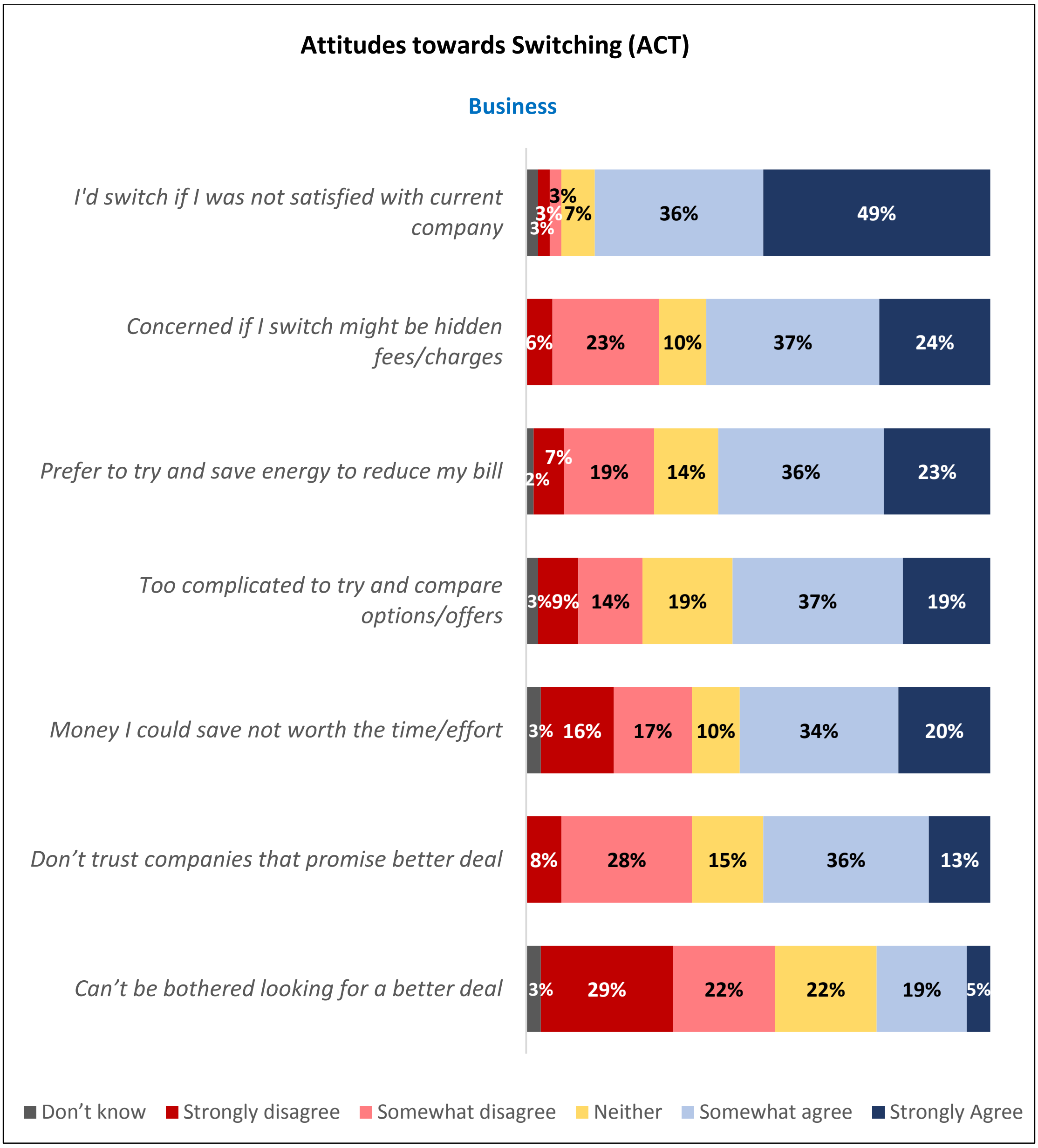
Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=908)	Residential (n=126)
Total	**$162**	**$214**
Last Quarterly Gas Bill: Less than $100	$120	Sample sizes too small to show breakdown
Last Quarterly Gas Bill: $100 - $300	$163	
Last Quarterly Gas Bill: $300 or more	$169	

Base: Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=11)
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?



Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=50)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

5.2.3 Consumer Satisfaction with the Market

Summary of Findings

Overall levels of satisfaction with the level of market choice in the ACT remained consistent among consumers with around a third being somewhat or very satisfied (34% vs. 32% in 2014 among residents and 33% vs. 38% in 2014 among small business consumers). Satisfaction with the level of market choice among consumers in the ACT was much lower than the NEM average. These results were fairly consistent with the 2014 qualitative research in the ACT that showed that most consumers assumed the level of market choice in ACT was the same in other states. Only those who were aware that other states had more choice were less satisfied, but ultimately, they assumed ACT would never be as competitive as other states given it was a smaller market.

Electricity

Among residents, levels of satisfaction with their current electricity were slightly lower this year (67% in 2015 vs. 73% in 2014) with a significant decrease in the proportion who were very satisfied (27% in 2015 down from 40% in 2014). Satisfaction among small business consumers remained fairly consistent with 2014 (72% either somewhat or very satisfied compared to 75% in 2014).

Around two thirds of residential consumers (64%) and just over half of small business consumers (69%) rated the overall quality of customer service provided by their electricity company quite highly (rating of seven or more out of ten).

Among residential consumers, ratings of overall value for money declined significantly in 2015 (45% rated seven or more vs. 56% in 2014) and shifted to below the NEM average (54%). Although not statistically significant, value for money ratings were higher among small business consumers in 2015 (58% vs. 42% in 2014).

Similar to other jurisdictions, residents with solar panels gave significantly higher ratings of their electricity company across all metrics.

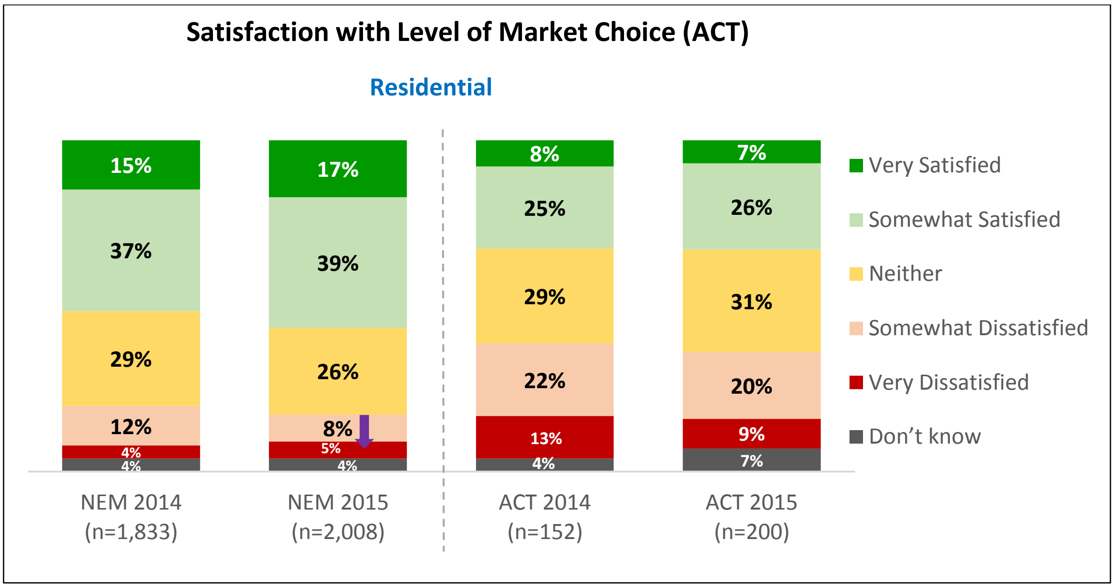
Gas

Satisfaction levels with current gas company remained consistent in 2015 with two thirds of residential consumers being very or somewhat satisfied (66% vs. 69% in 2014). Around three in five residential consumers (58%) rated the overall quality of customer service provided by their gas company quite highly (seven or more out of ten). This result was significantly lower than the NEM average (69%).

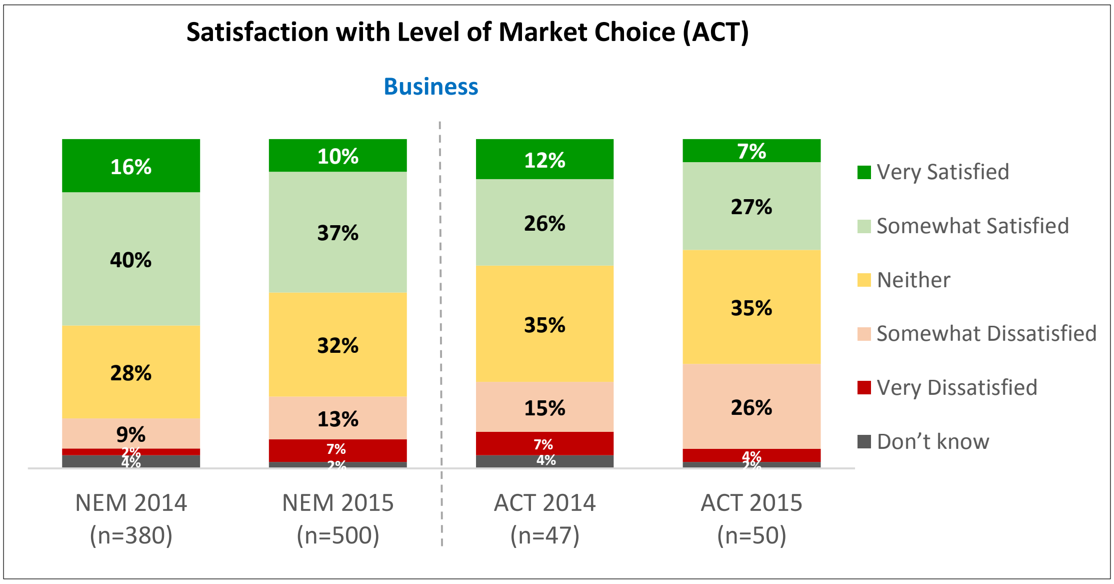
Consistent with 2014, around half of residential consumers (46% vs. 50% in 2014) rated the overall value for money provided by their gas company quite highly (seven or more out of ten). This result was significantly lower than the NEM average (61%).

The Results

Satisfaction with Level of Choice

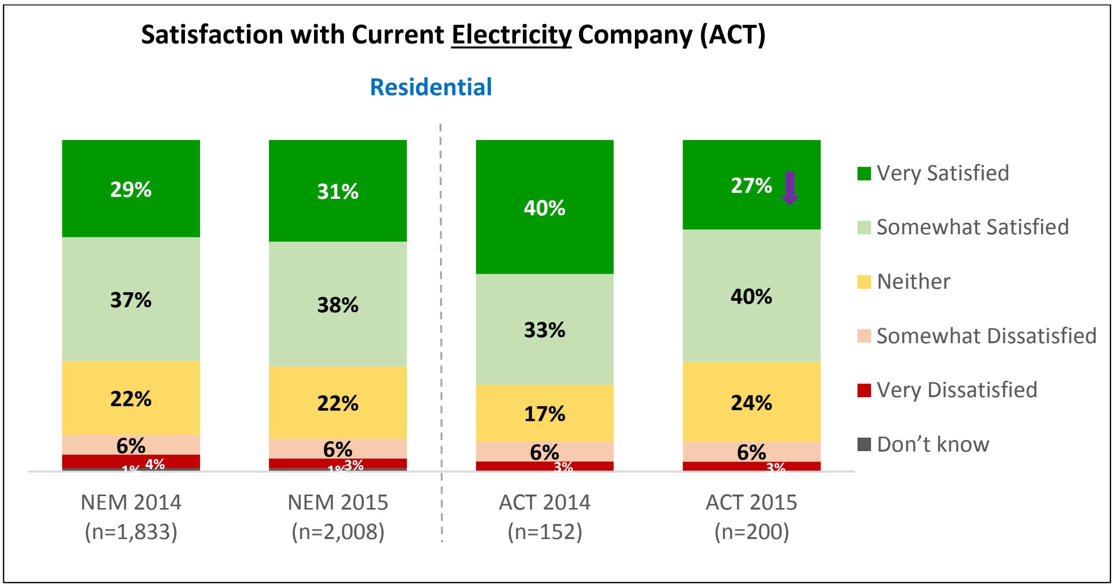


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

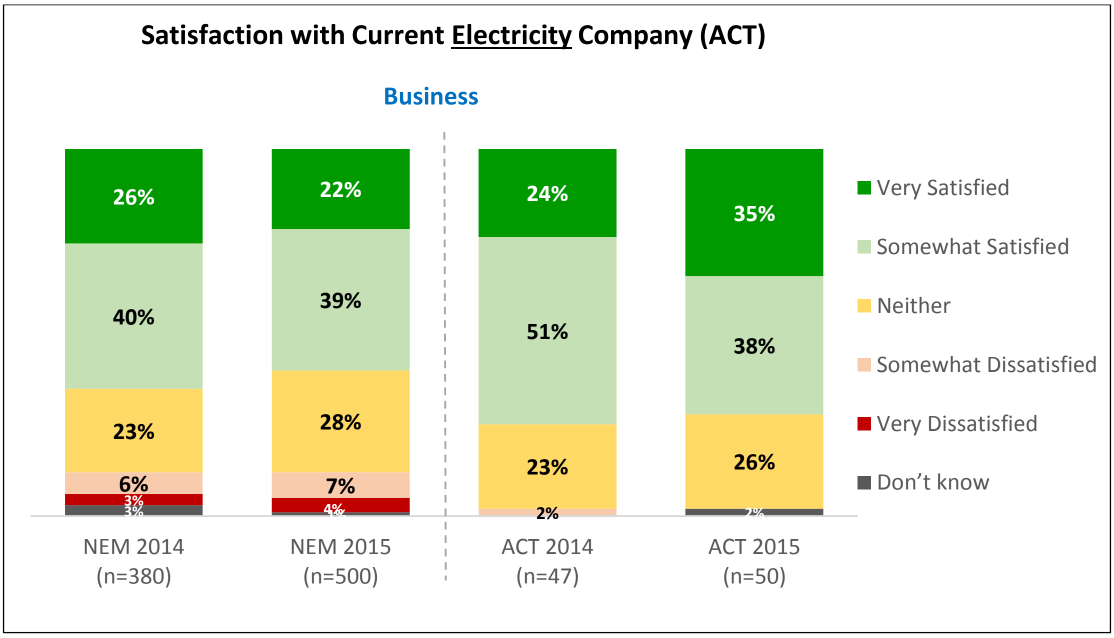


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

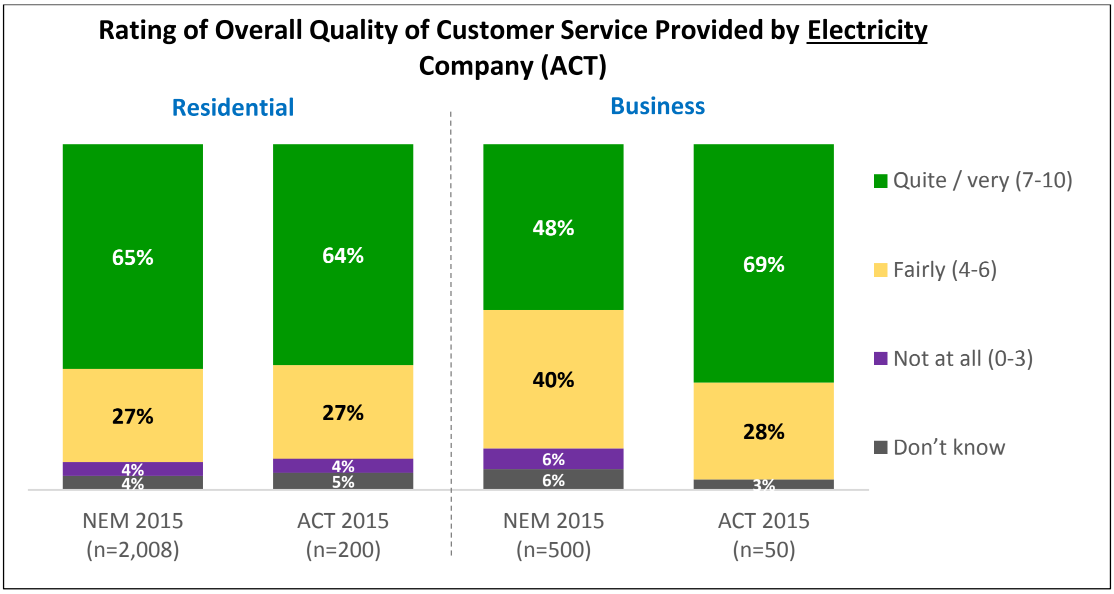
Satisfaction with Electricity Companies



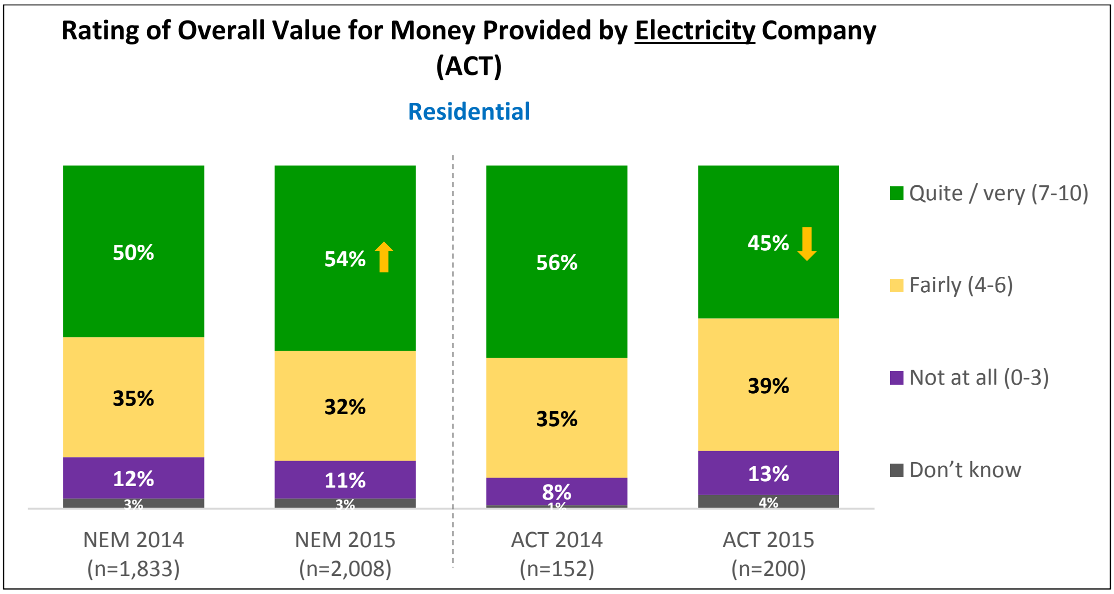
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



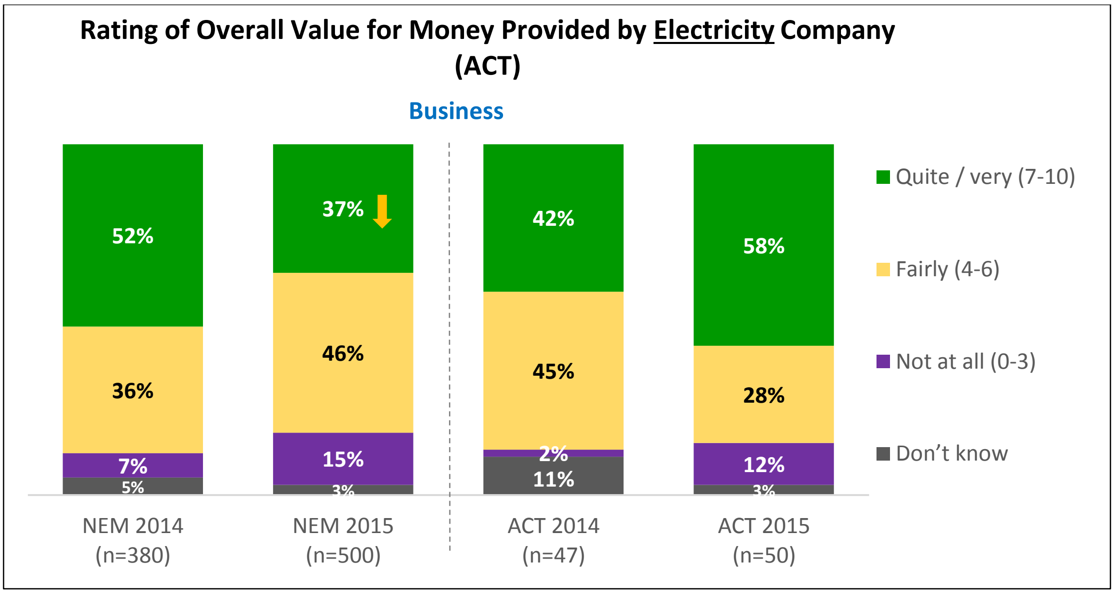
Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



Base: All Respondents (n=200)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

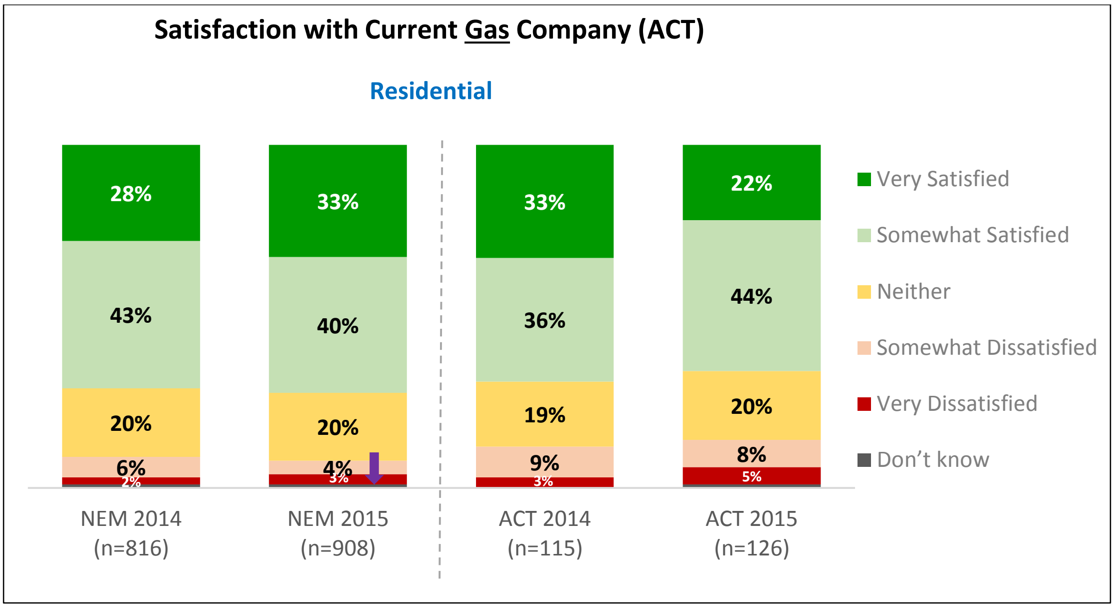


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

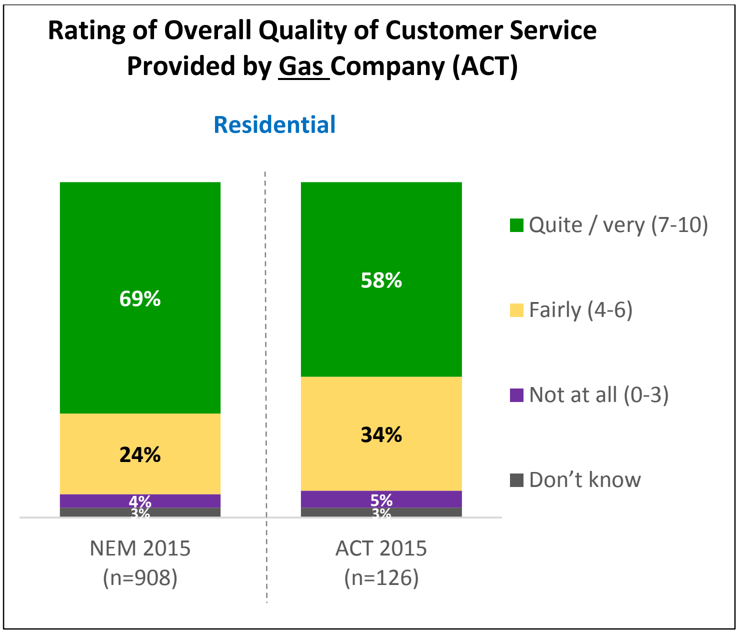


Base: All Respondents
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

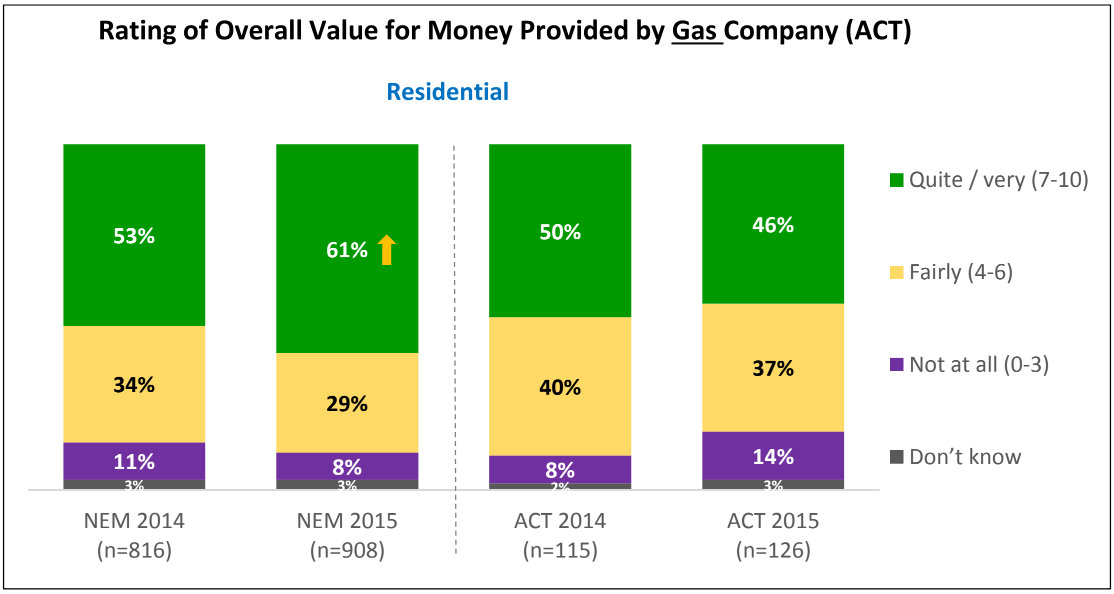
Satisfaction with Gas Companies



Base: All Respondents with mains connected gas. NB: Business results not shown due to small sample size (n=11)
Q7. And how satisfied are you with your current gas company?



Base: All Respondents. Business results not shown due to small sample size (n=11).
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.



Base: All Respondents with mains connected gas. Business results not shown due to small sample size (n=11)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

5.2.4 Information Sources and Gaps

Summary of Findings

The internet remained the most used information source to help residential consumers switch energy company or plan or investigate offers for electricity (45% using internet based sources in total), followed by direct contact with an energy retailer (12%) or simply looking at the price or saving (11%).

The internet was also the most useful information source among those who had switched (35% using internet based sources total) followed by direct contact with an energy retailer (15%) or getting advice from a family member or friend (13%).

When prompted, almost half of the residential consumers who had switched electricity company or plan (44%) said they had used a price fact sheet to understand the details of the electricity offer when they switched. There were no unprompted mentions of the price fact sheet.

Consistent with 2014 and with other NEM jurisdictions the most preferred information sources for finding information about different energy retailers and plans in general were also internet based sources (82% of residents, 77% of small business consumers). One in ten consumers specifically mentioned comparison websites as their most preferred method (12% residential, 8% small business consumers).

When it came to confidence in finding the right information to choose a suitable energy plan, around two in five residential consumers (38%) and half of business consumers (48%) were quite or very confident (rating seven or more out of ten). This result was fairly consistent with the NEM average for small business (45%) but significantly lower for residential consumers (54%).

Further analysis shows that:

- Residential consumers with higher confidence levels included: those with solar panels, those who had switched energy company or plan in the last 12 months or five years, and those who had actively investigated offers and options.
- Consistent with other NEM jurisdictions there is a strong relationship between confidence in choosing the right energy offer and confidence in finding the right information (correlation of 0.65).

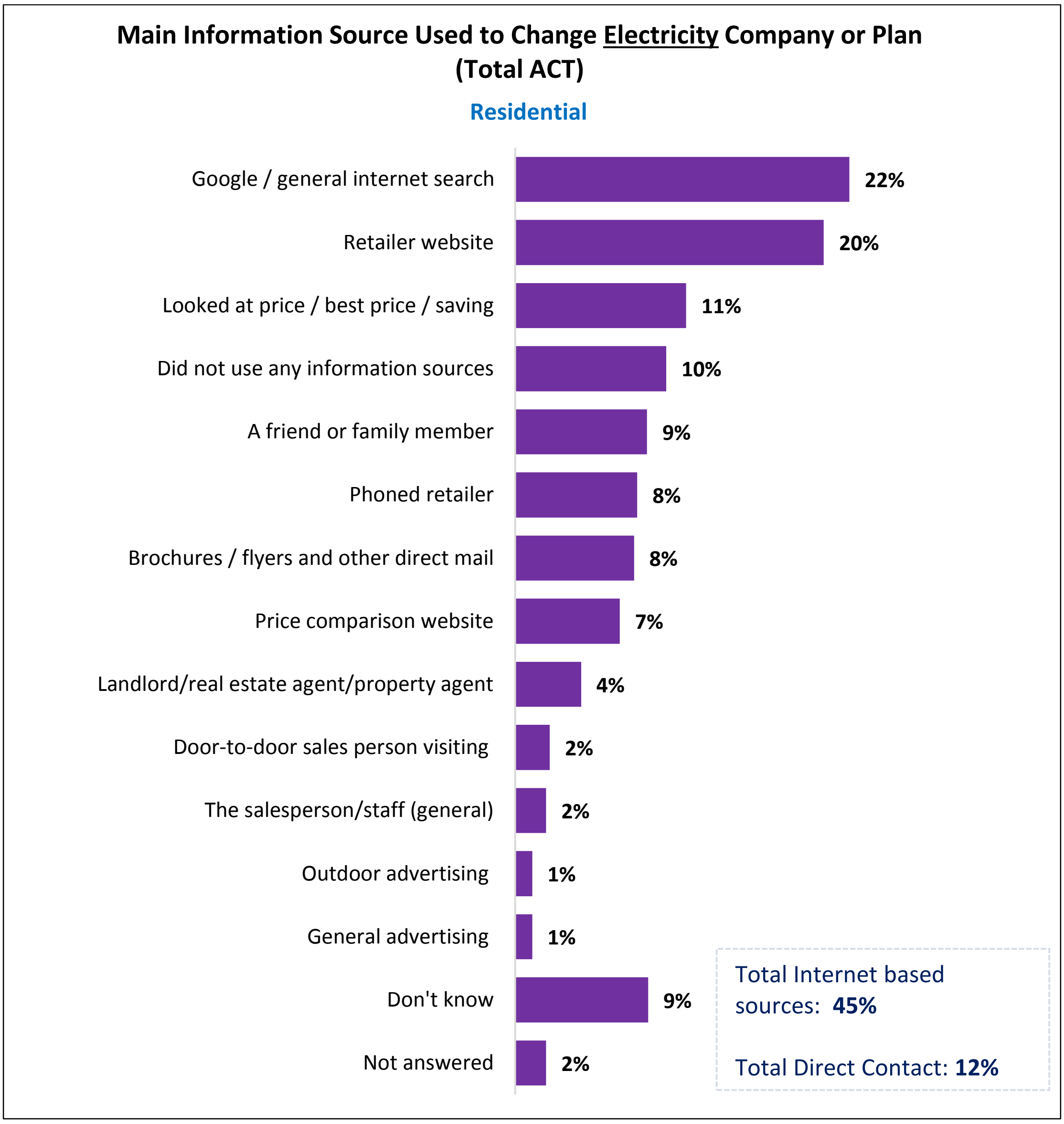
When considering confidence in finding the right information it is important to note that the 2014 qualitative research suggested that confidence levels tended to be overstated.

Unprompted awareness of comparison websites among residents was consistent with findings in 2014. The majority of consumers (83% of residents and 89% of small business) could not name any comparison sites at all and a further 3% were aware there were comparison sites but could not recall any specific names. In line with other jurisdictions, iSelect was the most commonly mentioned comparison site (6% or residents, 4% of small businesses) followed by Compare the Market (2%, 3%) and Choice (2%, 3%).

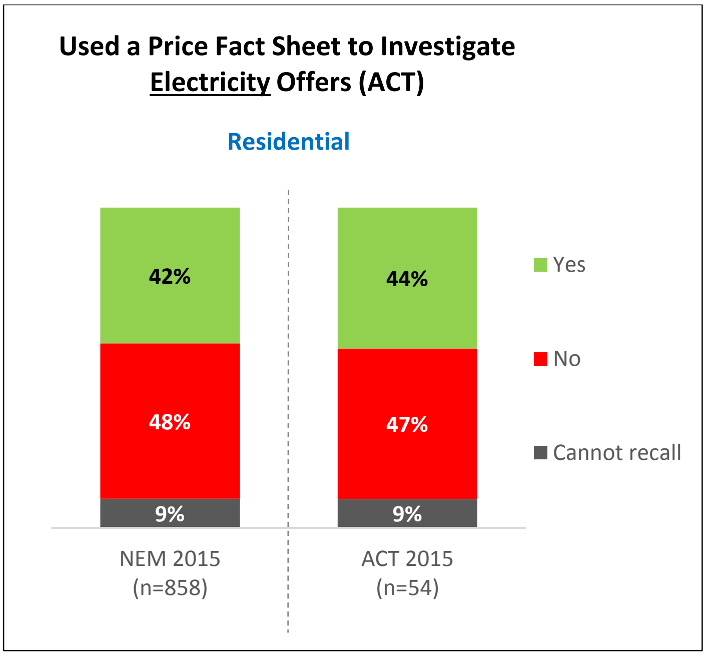
Consistent with 2014 findings, when prompted, less than one in ten residential consumers (7%) and just over one in ten small business consumers (12%) had heard of the *energymadeeasy* comparator website. Without prompting, just 1% of residential consumers had heard of it.

The Results

Information Sources Used to Investigate Offers or Switch

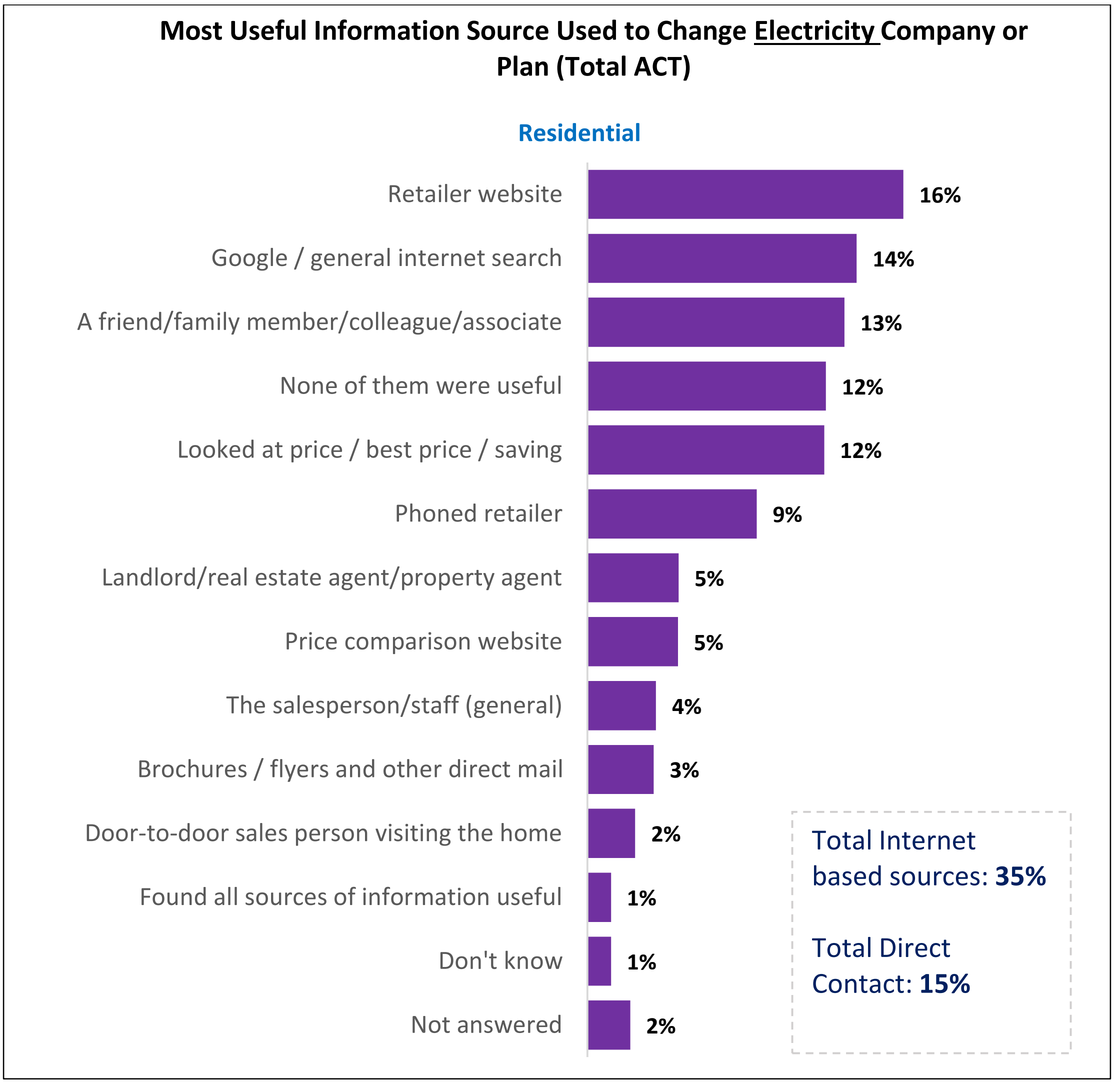


Base: Respondents who had switched electricity company or plan in the last five years (n=54). NB: Business results not shown due to small sample size (n=14)
Q23. The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? NB: Question wording changed in 2015 and so results are not directly comparable with 2014. MULTIPLE RESPONSE



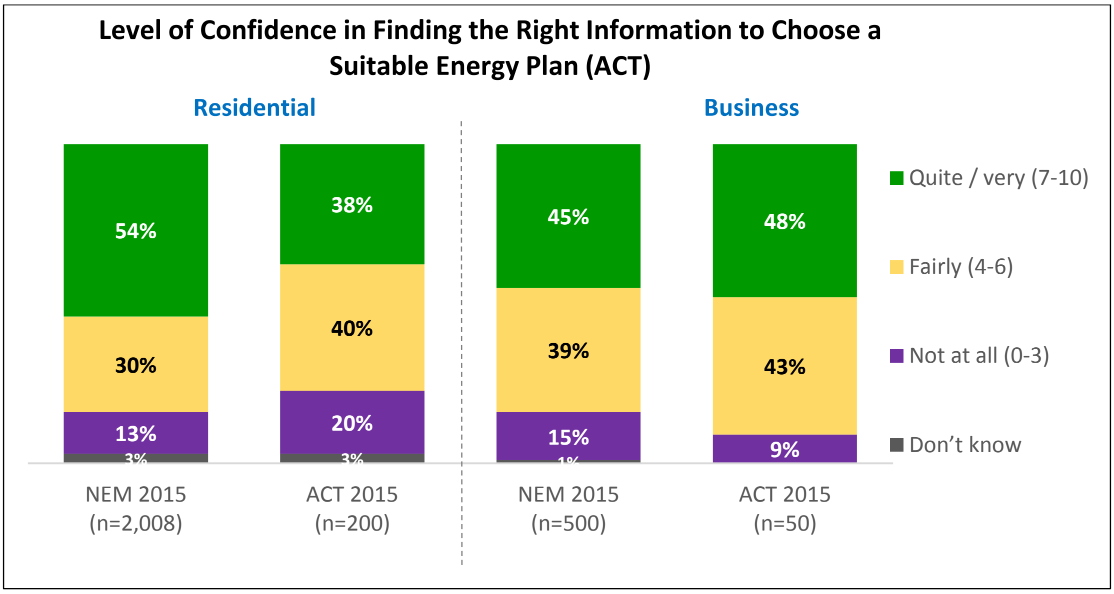
Base: Respondents who had switched electricity company or plan in the last five years. NB: Business results not shown due to small sample size (n=14)
Q48. The last time you investigated changing your electricity company or plan, did you use a price fact sheet to understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.

Most Useful Information Sources



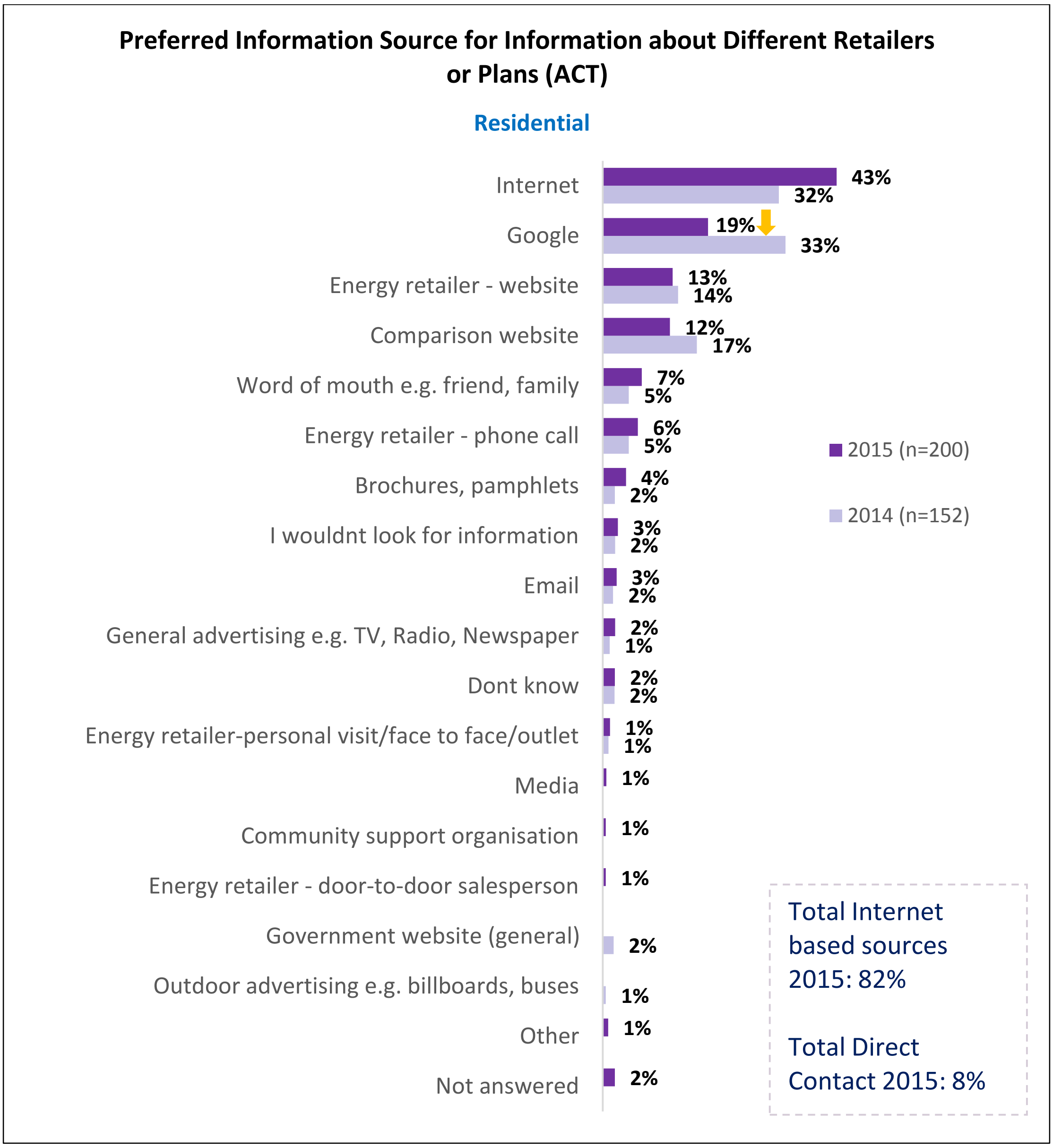
Base: Respondents who had switched electricity company or plan in the last five years (n=50). NB: Business results not shown due to small sample size (n=14)
Q47. And thinking about the information sources you used when changing your electricity company or plan, which one was most useful in helping with your decision to switch?

Adequacy of Information

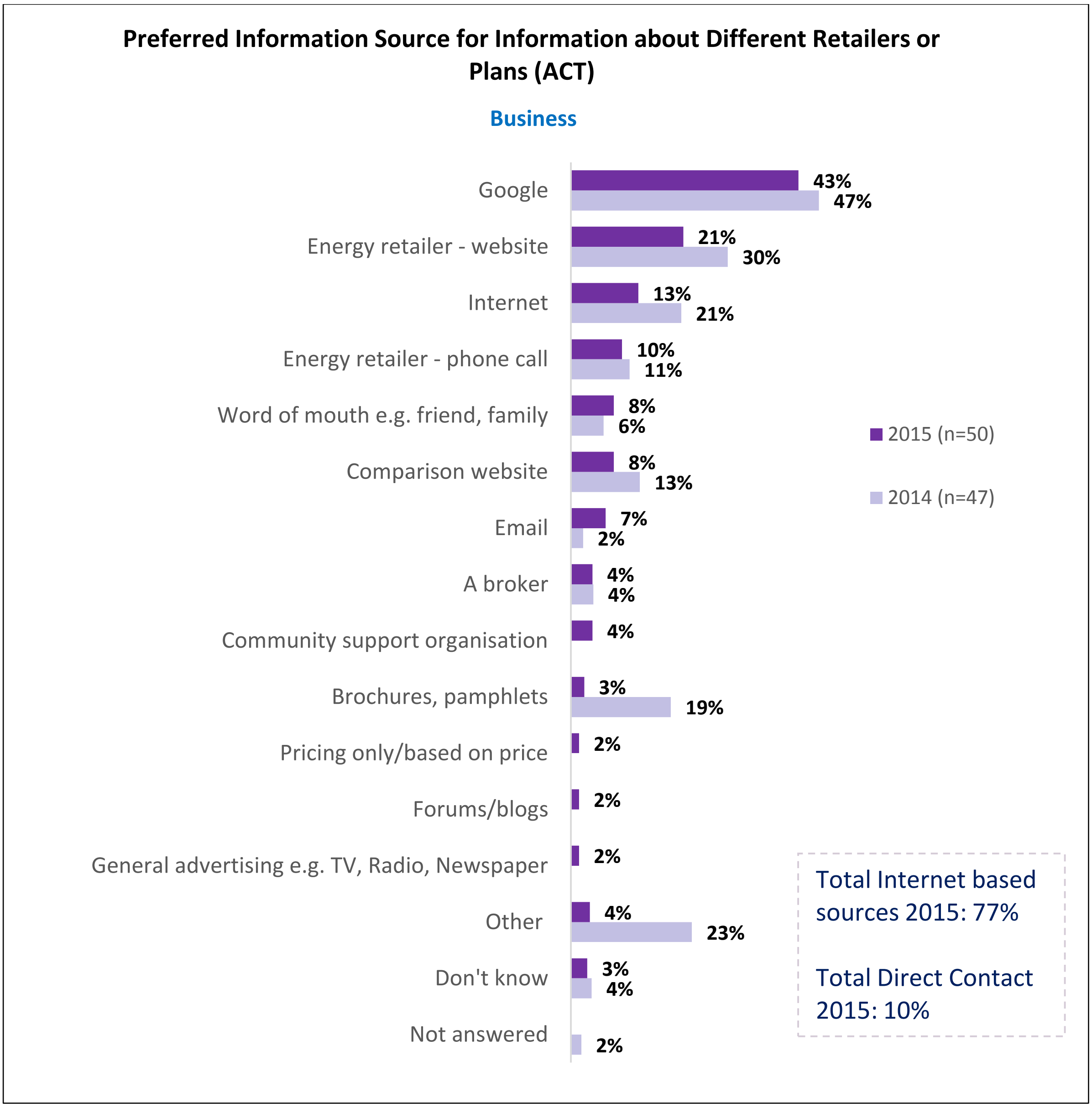


Base: All Respondents
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Preferred Information Sources

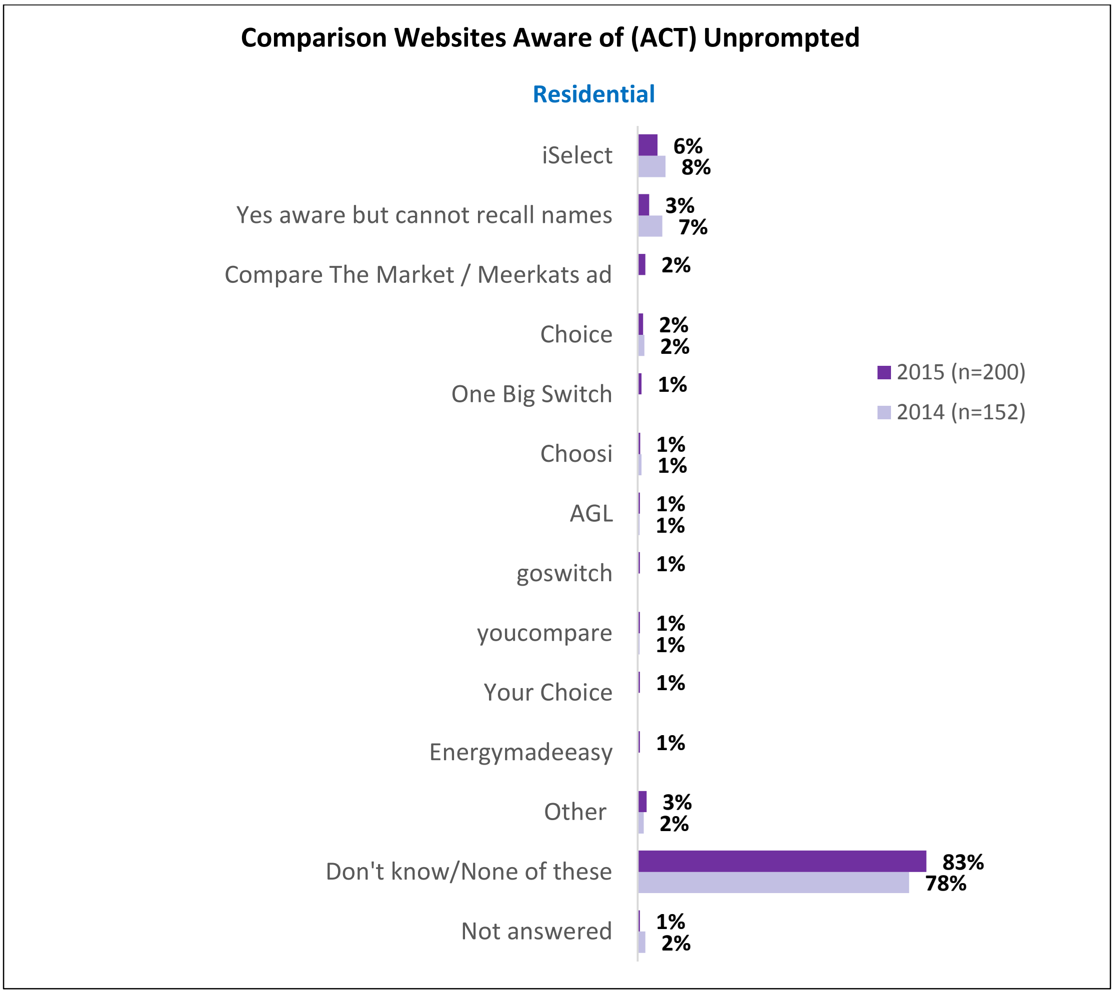


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

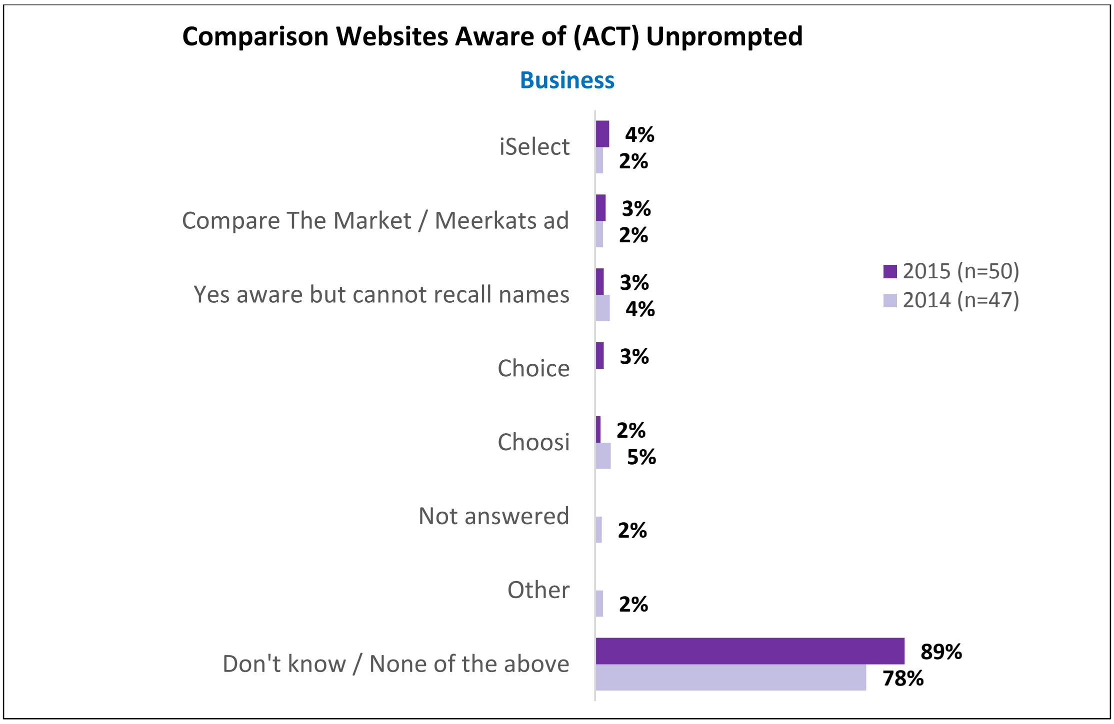


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

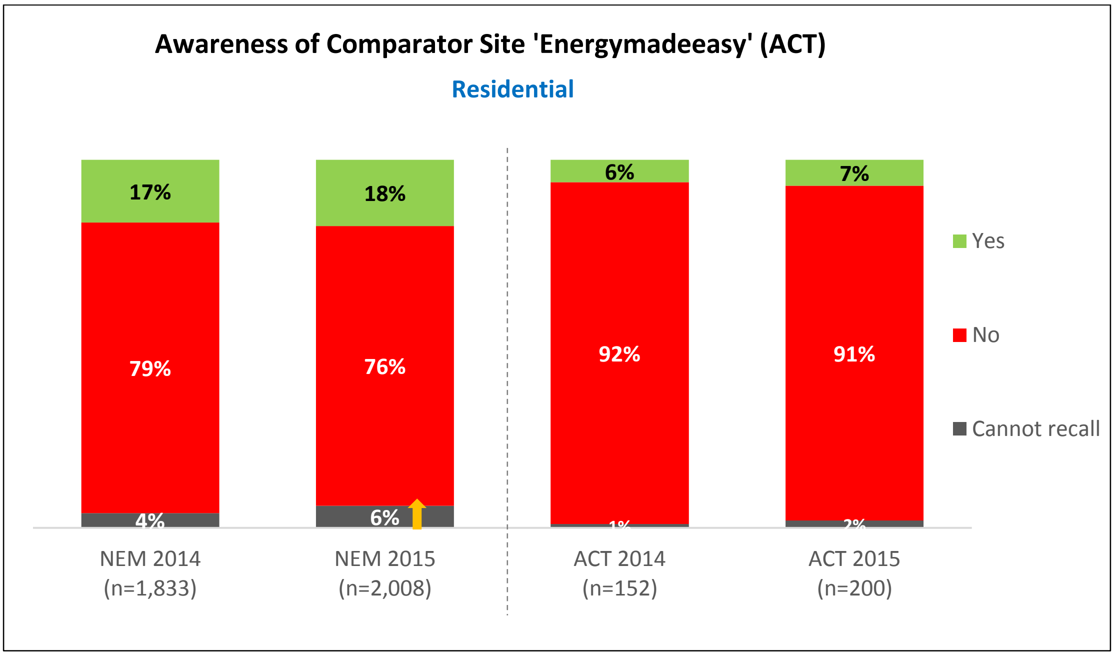
Awareness of Comparison Sites



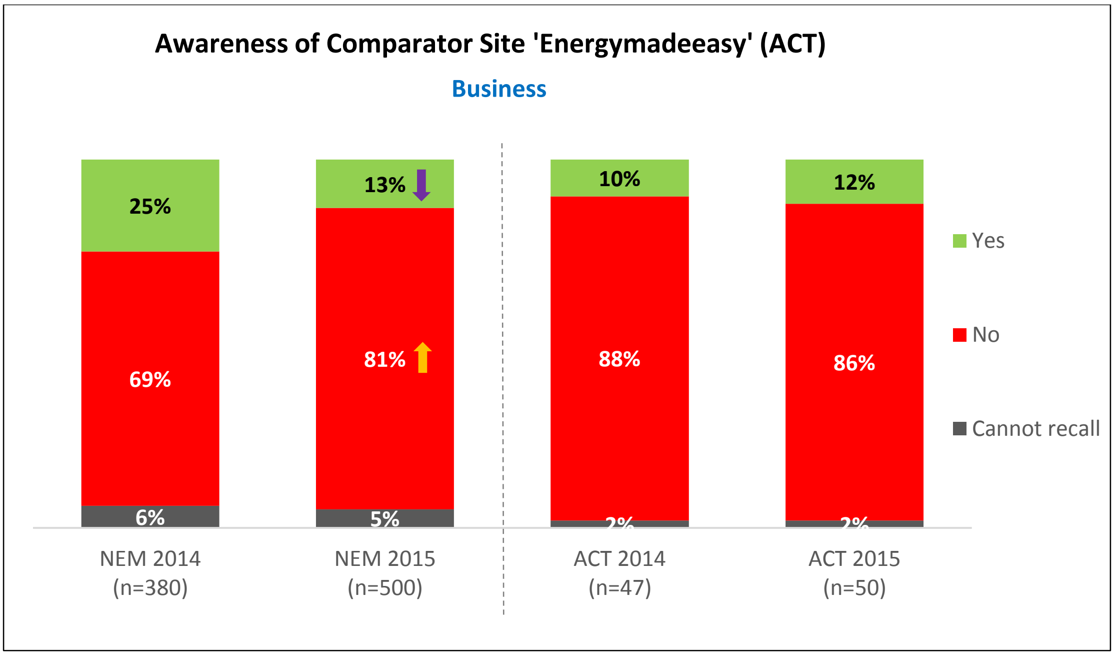
Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?



Base: All Respondents

Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?

TASMANIA

NEWGATE
RESEARCH

6. Tasmania

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6.1 Executive Summary

Introduction

This chapter outlines Newgate Research's findings from quantitative research conducted among small energy consumers in Tasmania in February 2015.

The research involved a mix of telephone and online surveys with n=200 residential consumers and n=50 small business consumers. For the purposes of this survey, residential consumers were defined as the person in the household who is the main or joint decision maker when it comes to choosing the energy company. Small business consumers also had to be the main decision maker and, in addition their quarterly electricity bill needed to be less than $6,000. If they had mains connected gas, their quarterly bill needed to be less than $7,350.

The sample breakdowns by methodology and for age and gender are shown in the tables below.

This is the first time Tasmania has been included in the National Competition Review research. We note that while all small customers are now contestable[1] there is currently only one retailer (Aurora) offering electricity contracts to residential customers and they have a choice of standing or market offers. There are two suppliers for business consumers (Aurora and ERM) and two suppliers for residential and small business gas customers (Aurora and TasGas). The AEMC commissioned research in Tasmania to form a baseline to measure changes in competition over time.

Respondent type by mode (n=)	Residential	Small Business
Online	150	-
Telephone	50	50
Total	**200**	**50**

Age/gender breakdown (residential n=)	Male	Female	Total
18-34	14	13	**27**
35-54	37	42	**79**
55+	41	53	**94**
Total	**92**	**108**	**200**

Further details about the methodology are provided in the Methodology section.

Throughout this chapter, statistically significant differences (95% confidence level) between individual sub-groups are indicated using **red** (meaning significantly lower than other groups) or **blue** font (significantly higher than other groups).

Please note, throughout this chapter the results relating to gas are not shown due to a small sample size (residents: n=19, small business n=1).

[1] The Tasmanian Government implemented full retail contestability for small customers in tranches, with the final tranche becoming contestable from 1 July 2014.

Key Findings

There was high awareness that residential consumers in Tasmania could not choose their electricity company

Most residents in Tasmania were aware they could not choose their electricity company, with the majority of consumers saying they did not have a choice (73%) and 16% saying they did have a choice. However, when asked how many electricity companies there were to choose from the average suggested there were three.

Among small businesses, there is very limited awareness that they can choose their electricity company with just 16% indicating they were aware they had a choice. Further, nearly three quarters of those who had not switched said it was because there were no other options or alternatives (73%).

Compared to the NEM average, consumers in Tasmania were far less confident they could choose the right energy option or offer for their household or business. Just three in ten residents (28% vs. 56% across the NEM) and one in six small business consumers (16% vs. 44% across the NEM) rated their confidence as seven or more out of ten.

The overall level of market participation in Tasmania was in line with the stage of deregulation and the level of competition in this jurisdiction

A small proportion of residents indicated they had changed their electricity company or plan (8% had switched in the past five years, 3% in the past year). The main reasons given were moving house or getting solar panels.

Among small business consumers, 4% had switched electricity company and 14% electricity plan in the past five years (14% in total). Results indicate that the main reason for switching was price related, however the small sample size does not allow us to fully explore the reasons among small businesses.

A small proportion indicated they had been approached by an energy company offering to sell them electricity or gas in the past 12 months (5% of residents and 6% of small business) and around one in ten residential (12%) and one in six small business consumers (16%) had actively investigated offers or options that they could potentially switch to.

A lack of choice was the biggest barrier to switching in Tasmania

By far, the most common reason given for not switching or investigation offers was because there were no other options or alternatives available (69% of residents, 73% of small business). A smaller proportion were simply satisfied with their current retailer or arrangements (12% of residents, 7% of small business consumers).

Attitudes towards switching or investigating offers are in line with the NEM

Despite the lower level of competition in Tasmania, interest in seeking out a better deal was fairly comparable to the NEM. A small proportion (5% of residents and 6% of small businesses) indicated they were currently looking for a better deal and around a third of residential consumers (36%) and half of the small businesses (51%) were interested but not currently looking for a better deal.

Attitudes towards switching and investigating offers in Tasmania were not as strong as those held in other NEM jurisdictions, however, the relative strength of the messages was fairly consistent with the strongest ones being: *I'm concerned that if I switch there will be hidden fees and charges* and *I would switch my energy company if I was not satisfied with my current company*.

Satisfaction with level of market choice and current electricity company lower than the NEM average

Overall levels of satisfaction with the level of market choice in Tasmania was very low with less than a quarter of residential consumers (23% vs. 56% across the NEM) and one in ten small business consumers somewhat or very satisfied (10% vs. 47% across the NEM).

When it came to satisfaction with their current electricity company, results in Tasmania were significantly lower than found elsewhere in the NEM. Six in ten residents (60% vs. 69% across the NEM) and four in ten small business consumers (40% vs. 61% across the NEM) were somewhat or very satisfied with their current electricity company. Around one in six consumers were very or somewhat dissatisfied (15% of residents vs. 8% across the NEM and 18% of small businesses vs. 11% across the NEM).

When it came to the quality of customer service and the overall value for money, the results in Tasmania were fairly comparable with the NEM.

Further research would be needed to understand why satisfaction levels are lower in this jurisdiction.

In line with other NEM jurisdictions the internet was the most preferred information source

Consistent with other NEM jurisdictions the most preferred information sources for finding information about different energy retailers and plans in general were internet based (75% of residents, 84% of small business consumers).

Confidence levels of being able to find the right information to choose a suitable energy plan were lower in Tasmania when compared to the NEM average

When it comes to confidence in finding the right information to choose a suitable energy plan, around four in ten residential consumers (39% vs. 54% across the NEM) and around a quarter of small business consumers (23% vs. 45% across the NEM) were quite or very confident (rating 7 or more out of 10). Almost a quarter of residents (23%) and a third of small business consumers (34%) were not at all confident (rating 3 or less out of 10).

The vast majority of consumers in Tasmania were unaware of any comparison websites

Unprompted awareness of comparison websites was very low with the majority of residential and business consumers (94%) unable to name any comparison sites at all.

When prompted, just 5% of residential and 6% of small business consumers had heard of the *energymadeeasy* website. Without prompting, just 1% of residential consumers had heard of it.

Snapshot of Results

6.2 Key Findings in Detail

6.2.1 Customer Awareness & Understanding

Summary of Findings

In Tasmania there is only one electricity company that residents can buy electricity from (Aurora) and two for small businesses (Aurora and ERM). Most residents in Tasmania were aware they could not choose their electricity company, with the majority of consumers saying they did not have a choice (73%) and 16% saying they did have a choice.

Among small businesses, there is very limited awareness that they can choose their electricity company with just 16% indicating they were aware they had a choice. Further, nearly three quarters of those who had not switched said it was because there were no other options or alternatives (73%).

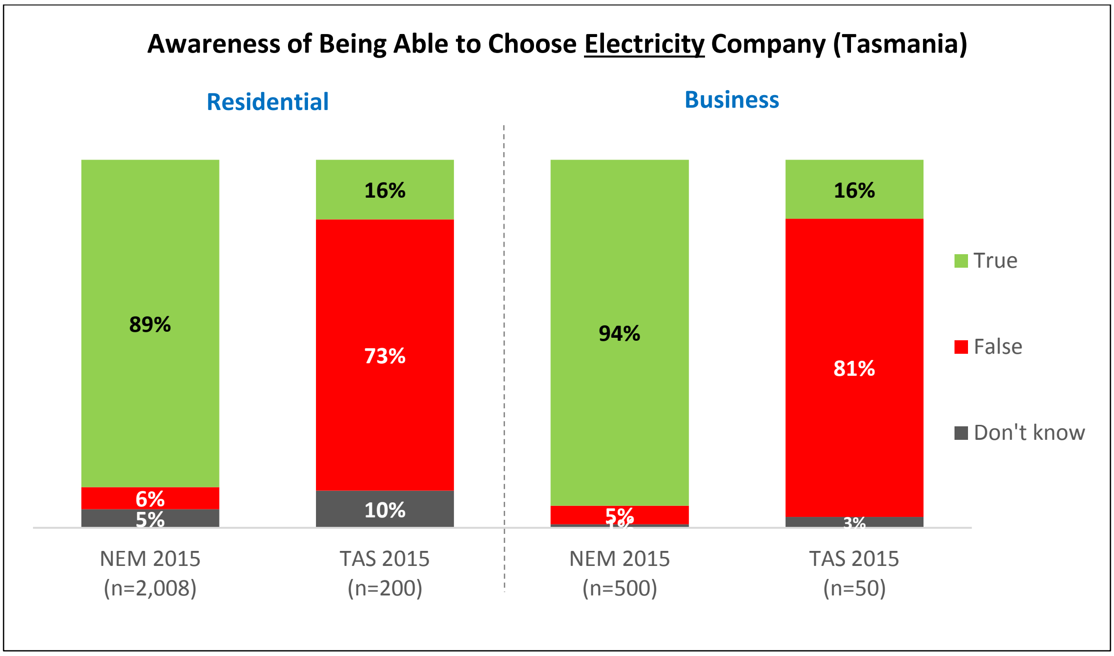
Despite there being only one electricity brand for residents to choose from and two for businesses, residents in the survey thought there were about three electricity brands they could choose from on average. Just 10% of residential consumers indicated there was one brand and 23% thought there were two. The sample size for small business consumers was too low to report this result.

When it came to choosing from different electricity options and plans, around one in six residents (16%) and one in ten small business consumers (12%) indicated they had a choice.

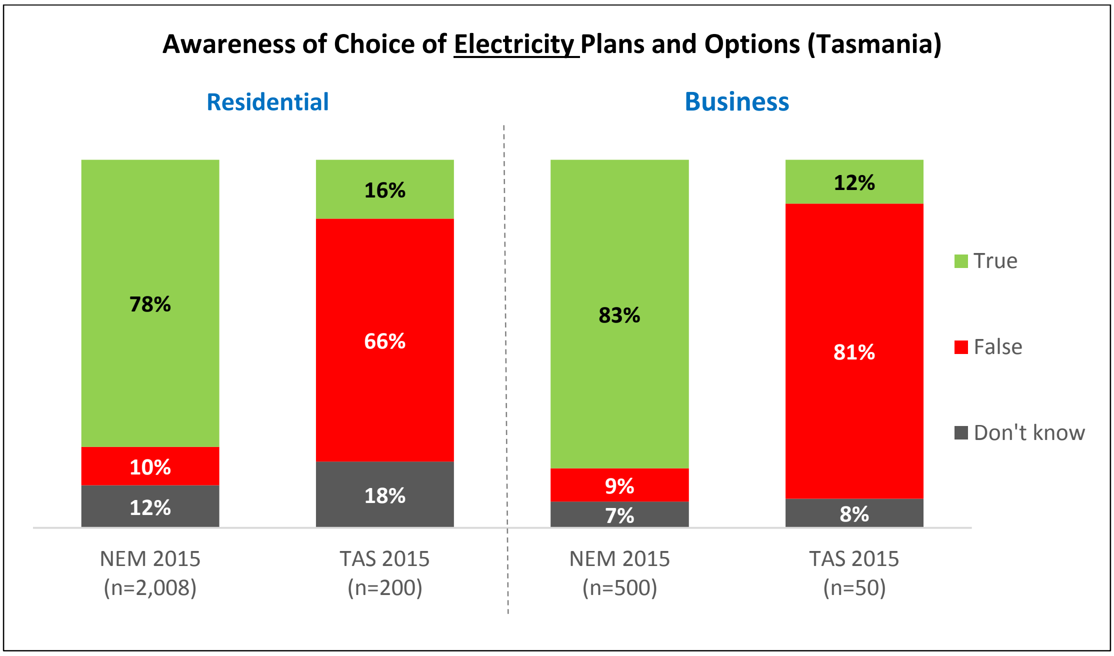
As expected, the proportion of consumers who indicated they could choose their energy company or plan in Tasmania was significantly lower than the NEM average.

Compared to the NEM average, consumers in Tasmania were far less confident they could choose the right energy option or offer for their household or business. Just three in ten residents (28% vs. 56% across the NEM) and one in six small business consumers (16% vs. 44% across the NEM) rated their confidence as seven or more out of ten.

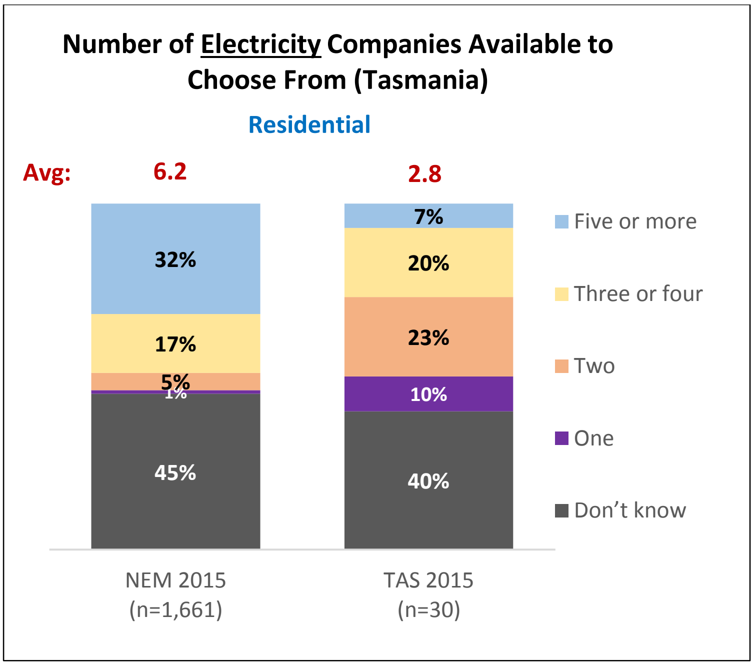
The Results



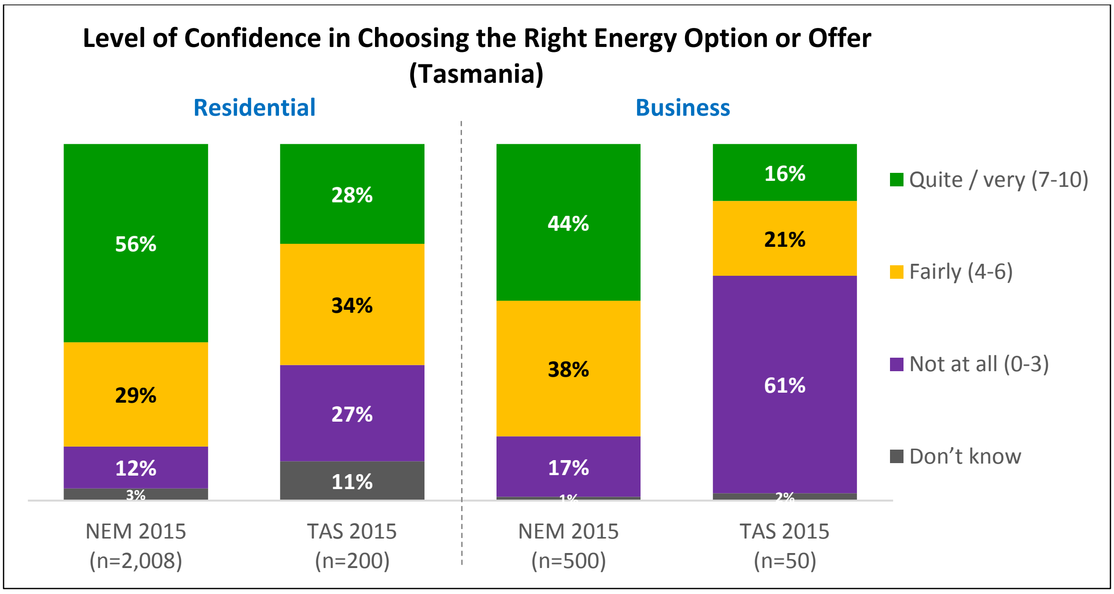
Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company



Base: All Respondents
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.



Base: Respondents who say they can choose their electricity company. Business results not shown due to small sample size (n=8)
Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state [if ACT] or territory?



Base: All Respondents
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

6.2.2 Market Participation

Summary of Findings

The overall level of market participation in Tasmania was in line with the stage of deregulation and the level of competition in this jurisdiction.

Incidence of Switching or Investigating Offers

Consumers in Tasmania were asked how many times they had switched their electricity or gas company or plan in the past five years and if they had switched, they were also asked how many times they switched in the past 12 months.

A small proportion of residents indicated they had changed their electricity company or plan (8 had switched in the past five years, 3% in the past year).

Of the eight residents who said they had switched company seven said it was because they moved house. Of the eleven who had switched their plan four had moved house and three got solar panels and three wanted a cheaper price or said they received a discount or incentive and one switched for other reasons.

Among small business consumers, 14% had switched electricity company or plan in the past five years (6% in the past year). Of the six who had switched, five wanted a cheaper price or said they received a discount or incentive and one switched for other reasons.

A small proportion of consumers in Tasmania indicated they had been approached by an energy company offering to sell them electricity or gas in the past 12 months (5% of residents and 6% of small business).

Around one in ten residential (12%) and one in six small business consumers (16%) had actively investigated offers or options that they could potentially switch to in the past 12 months.

Barriers to Investigating Offers or Switching

By far, the most common reason given for not switching or investigating offers in Tasmania was because there were no other options or alternatives available (69% of residents, 73% of small business). A smaller proportion were simply satisfied with their current retailer or arrangements (12% of residents, 7% of small business consumers).

Switching Intentions and Attitudes

Despite the lower level of competition in Tasmania, interest in seeking out a better deal was fairly comparable to the NEM:

- A small proportion (5% of residents and 6% of small businesses) indicated they were currently looking for a better deal;
- Around a third of residential consumers (36%) and half of the small businesses (51%) were interested but not currently looking for a better deal;
- Just over one in ten residents (13%) and a quarter of small businesses (25%) mentioned (without prompting) that they had no other options to choose from; and
- Two in ten residents (22%) and one in ten small businesses (12%) were not interested in switching at all.

Residents with higher electricity bills were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal.

In order to seriously consider switching their company or plan, residents wanted to save an average of $211 per year on their electricity bill which was in line with the NEM average. Consistent with other NEM jurisdictions, those with higher energy bills wanted to see a bigger saving before they considered switching.

Attitudes towards switching and investigating offers in Tasmania were not as strongly held as those in other NEM jurisdictions, although the relative strength of each message was consistent. The strongest agreement levels were evident for the statements: *I'm concerned that if I switch there will be hidden fees and charges* (57% residential, 58% small business) and *I would switch my energy company if I was not satisfied with my current company* (54% residential, 56% small business).

The Results

Incidence of Switching or Investigating Offers

In the Last Five Years

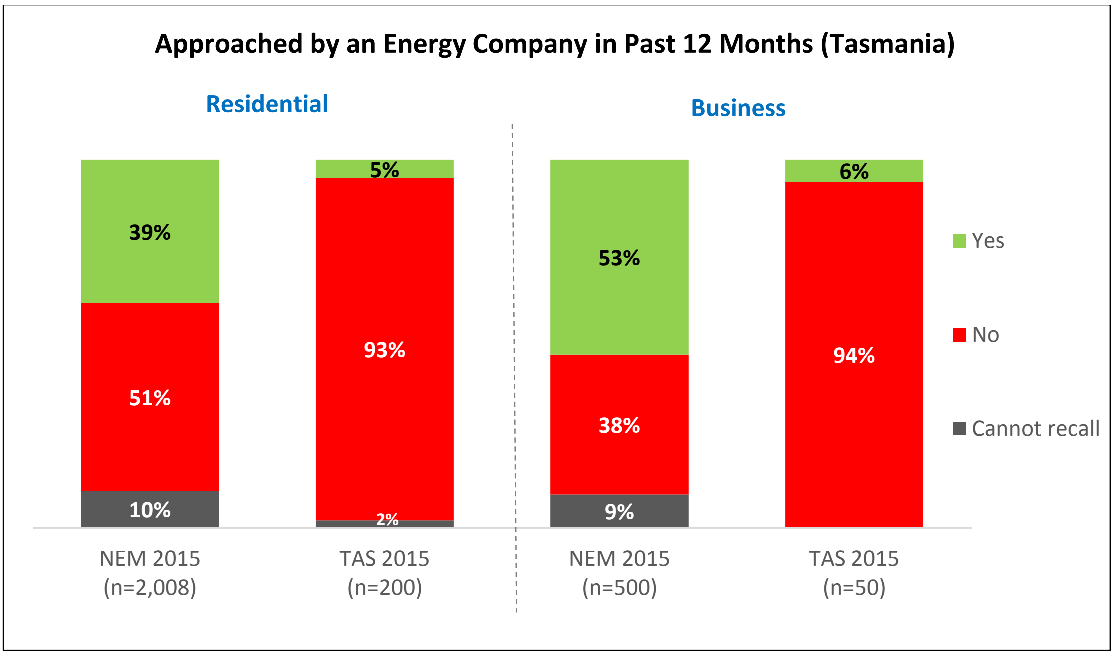
Provider **(% switched at least once)**	Residential		Business	
	NEM (n=2,008)	**TAS (n=200)**	**2015 (n=500)**	**TAS (n=50)**
Electricity Company	39%	4%	44%	4%
Electricity Plan	31%	6%	33%	14%
TOTAL Electricity	**50%**	**8%**	**55%**	**14%**
Car Insurance	35%	32%	Not asked of small business consumers	
Mobile	31%	30%		
Internet	29%	32%		
Home Insurance	26%	23%		
Home Phone	20%	26%		
Banking	19%	16%		
Health Insurance	16%	13%		

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

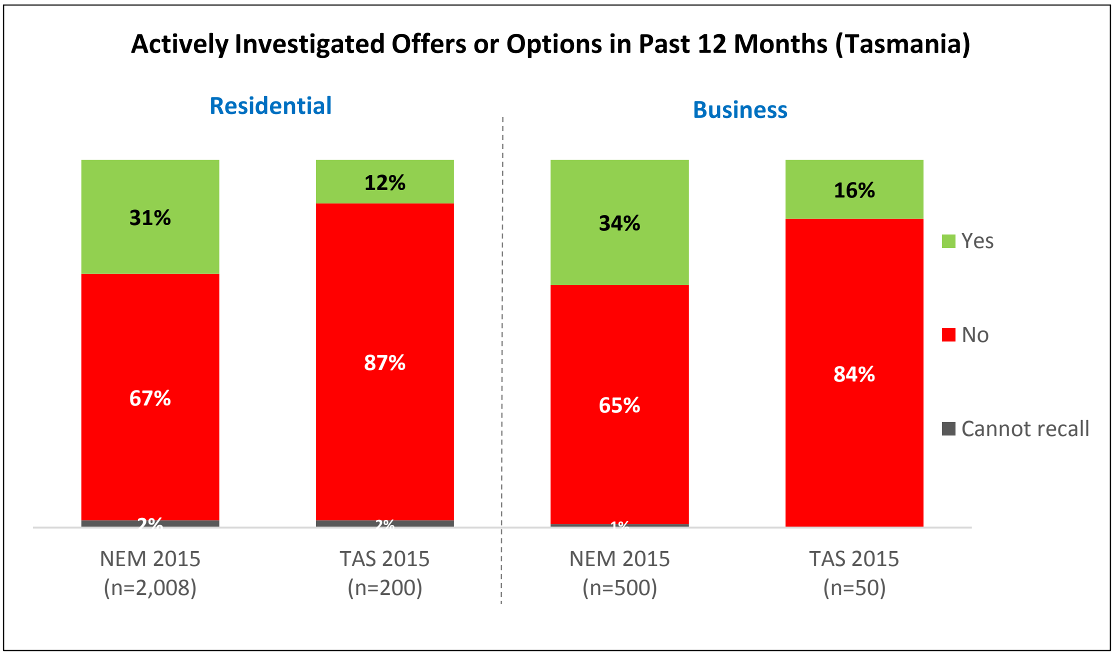
In the last 12 months

Provider (% switched at least once)	Residential		Business	
	NEM (n=2,008)	**TAS (n=200)**	**NEM (n=500)**	**TAS (n=50)**
Electricity Company	14%	2%	18%	3%
Electricity Plan	16%	3%	17%	6%
TOTAL Electricity	**22%**	**3%**	**28%**	**6%**

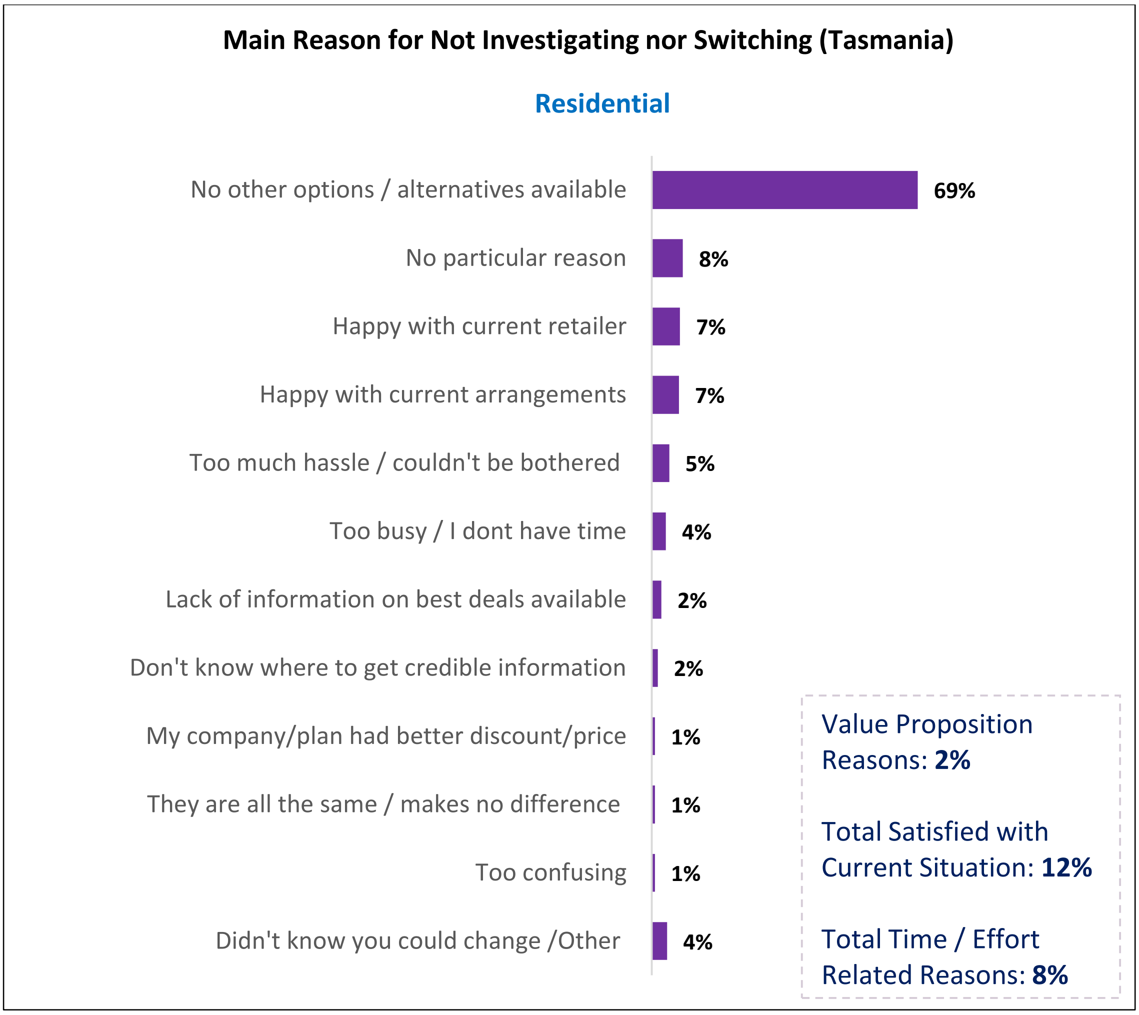
Base: All Respondents
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?



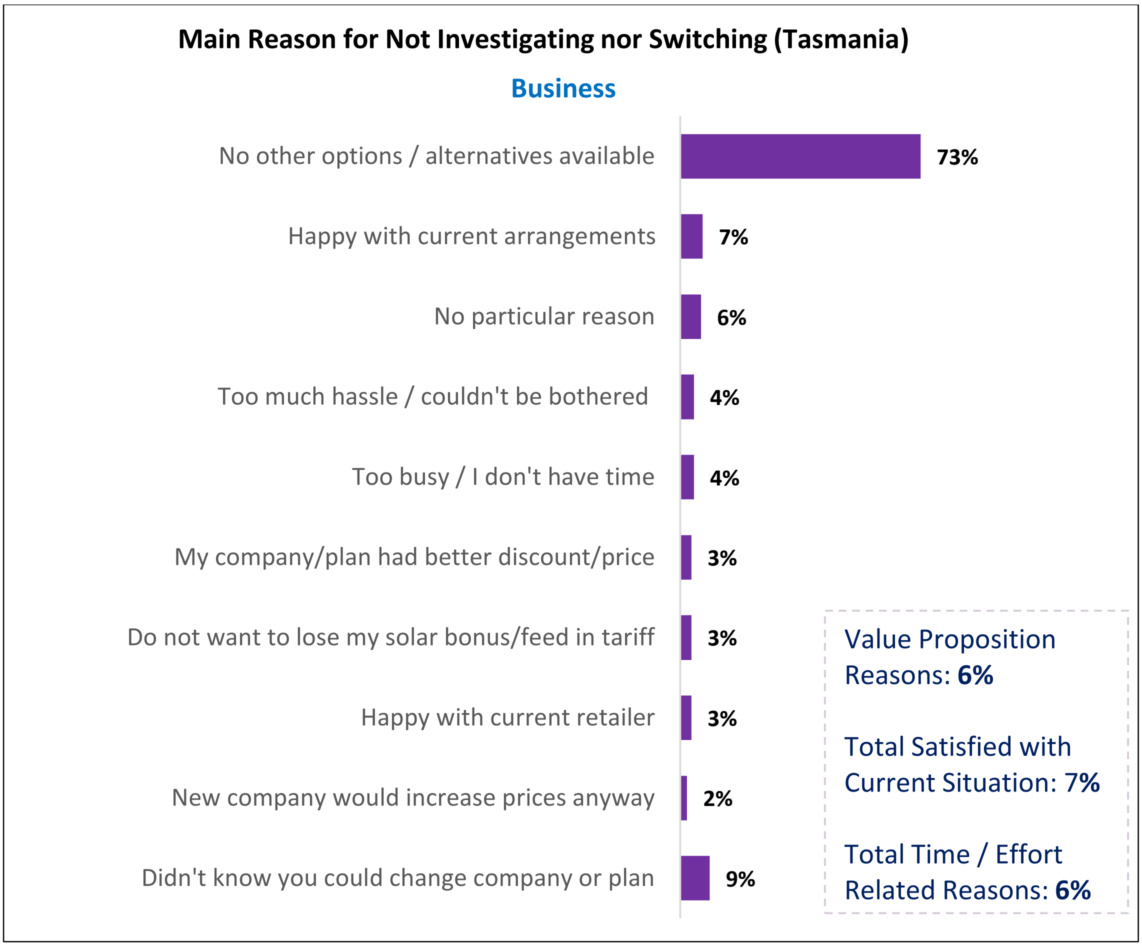
Base: All Respondents
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?



Base: All Respondents
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

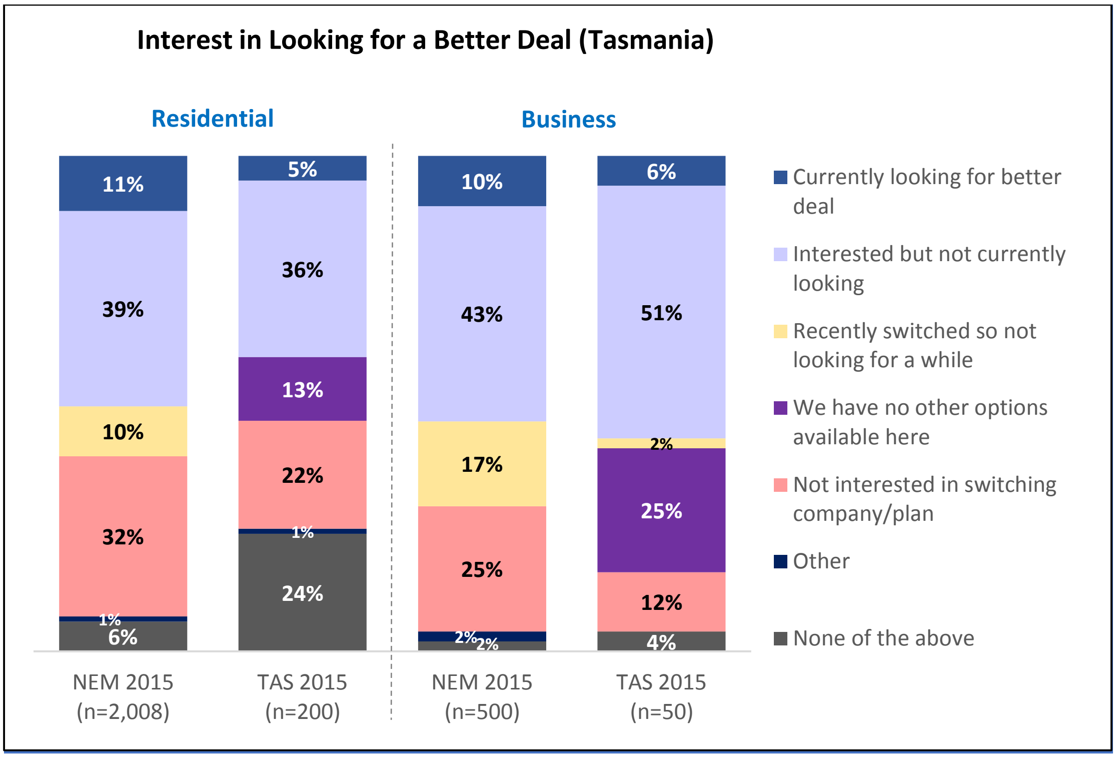


Base: Respondents who had not investigated offers and options nor switched in the past 12 months (n=163)
Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?



Base: Respondents who had not investigated offers and options nor switched in the past 12 months (n=39). Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

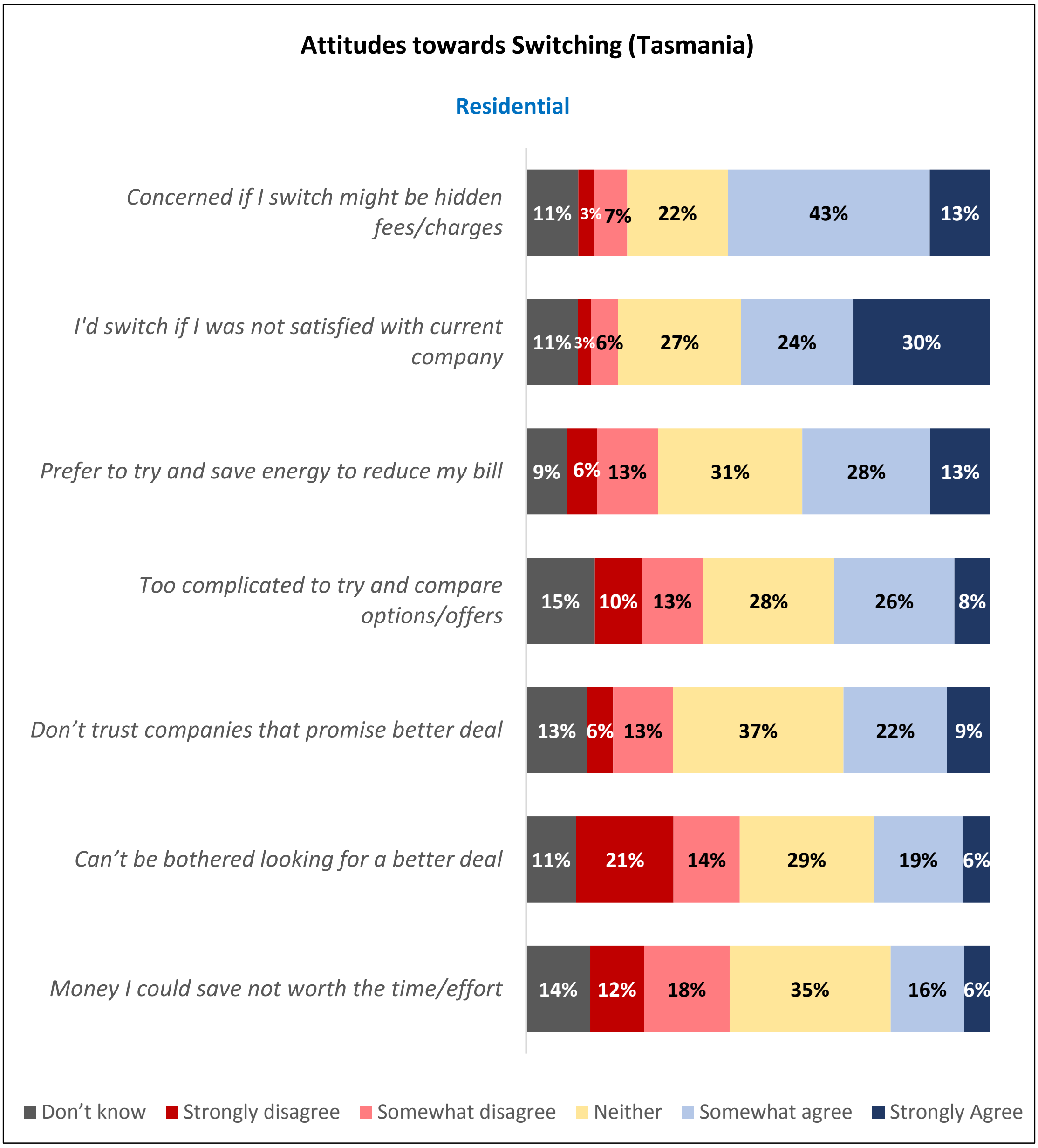
Switching Intentions and Attitudes



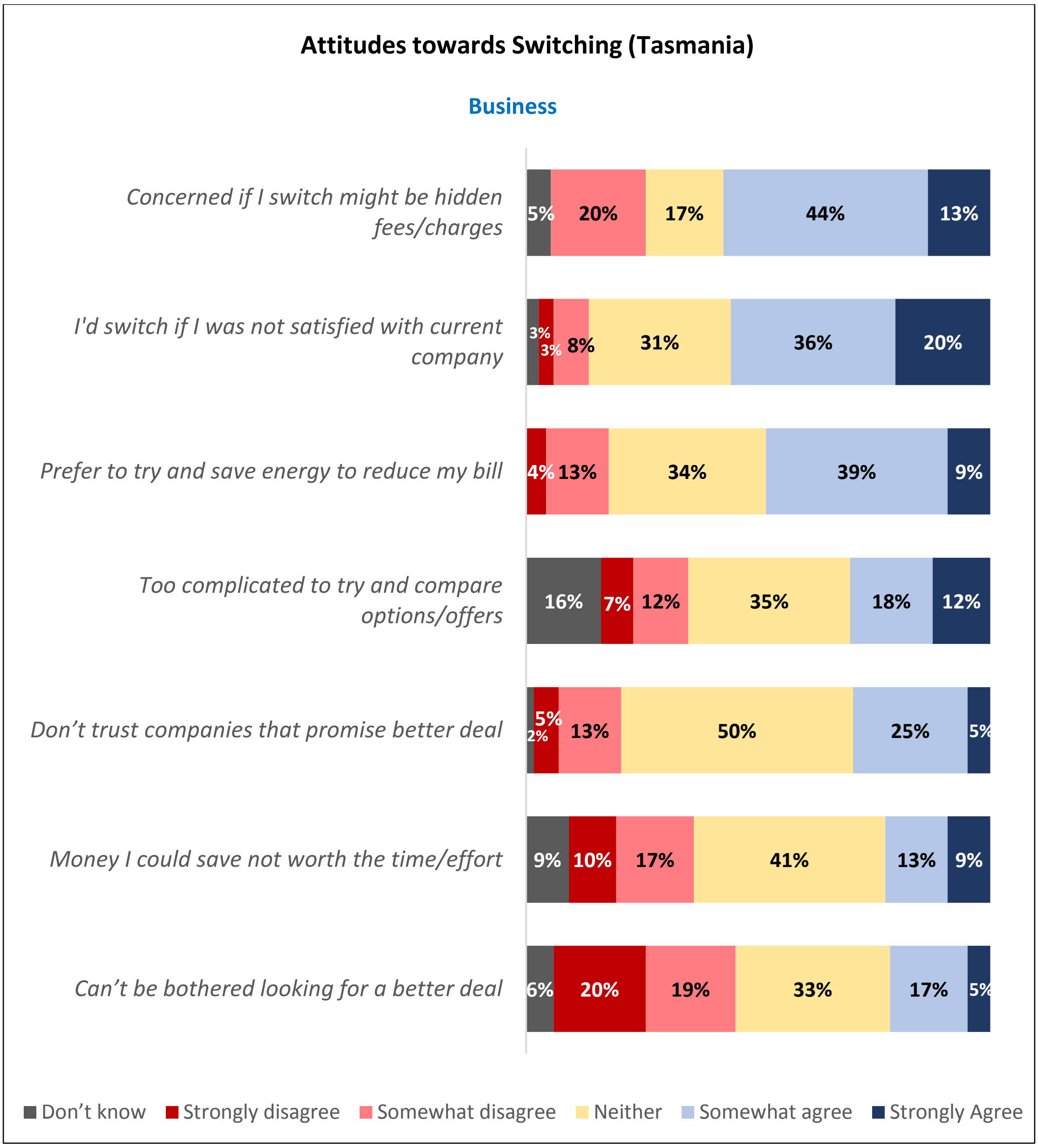
Base: All Respondents
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Residential	
	NEM (n=2,008)	TAS (n=200)
Total	**$207**	**$211**
Last Quarterly Electricity Bill: Less than $300	$178	$175
Last Quarterly Electricity Bill: $300-$500	$210	$222
Last Quarterly Electricity Bill: $500 or more	$247	$225

Base: All Respondents. NB. Business results not shown due to small sizes
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?



Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…



Base: All Respondents (n=50)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

6.2.3 Consumer Satisfaction with the Market

Summary of Findings

Satisfaction with the level of market choice was lower than the NEM average with less than a quarter of residential consumers (23% vs. 56% across the NEM) and one in ten small business consumers somewhat or very satisfied (10% vs. 47% across the NEM). Satisfaction was significantly lower among residents with a high quarterly electricity bill.

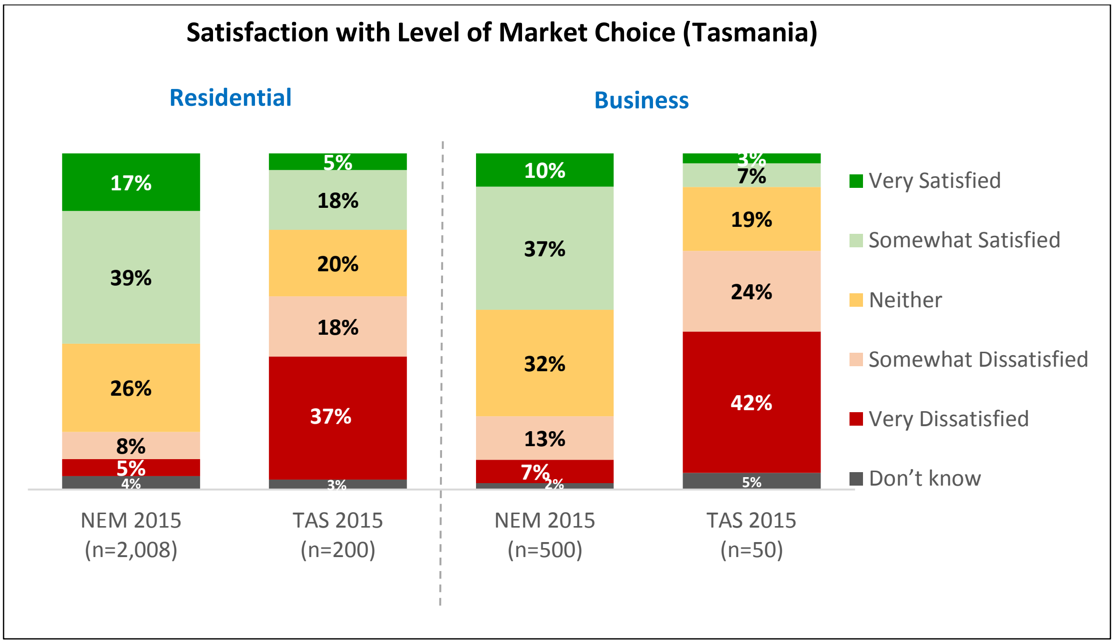
When it came to satisfaction with their current electricity company, results in Tasmania were again significantly lower than found elsewhere across the NEM. Six in ten residents (60% vs. 69% across the NEM) and four in ten small business consumers (40% vs. 61% across the NEM) were somewhat or very satisfied with their current electricity company. Around one in six consumers were very or somewhat dissatisfied (15% of residents vs. 8% across the NEM and 18% of small businesses vs. 11% across the NEM). Those with a low electricity spend were significantly more satisfied with their current electricity company.

Satisfaction with the overall quality of customer service was fairly high and in line with the NEM average with six in ten residential consumers (61% vs. 65% across the NEM) and almost half of small business consumers (45% vs. 48% across the NEM) giving a rating of a seven or more out of ten.

Ratings of overall value for money were fairly consistent with other jurisdictions (47% vs. 54% NEM for residents and 38% vs. 37% NEM for small businesses). Those with a high quarterly electricity bill gave significantly lower ratings.

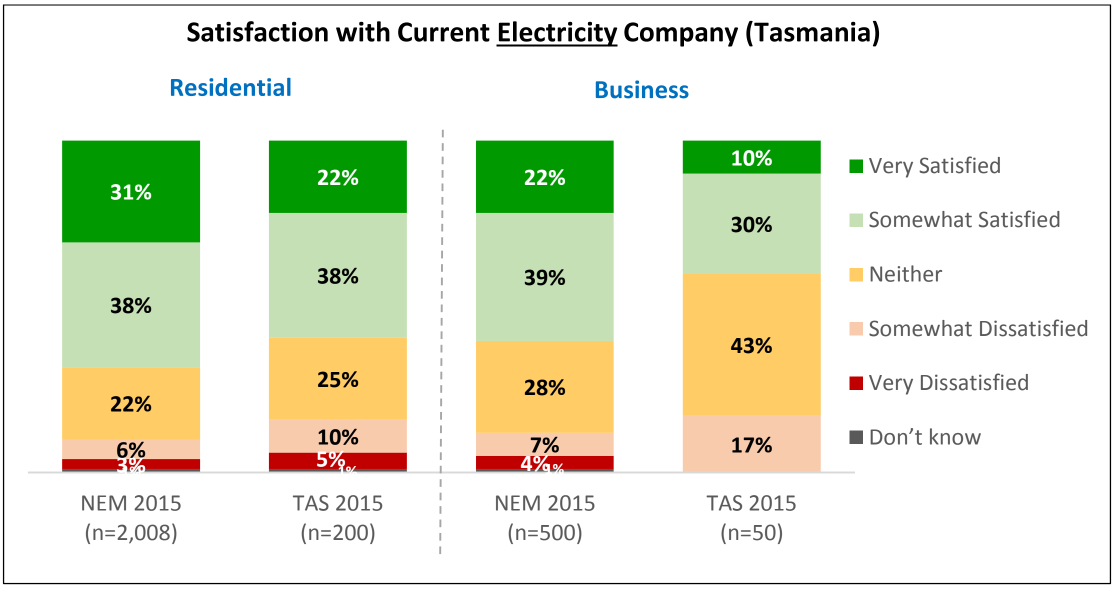
The Results

Satisfaction with Level of Choice

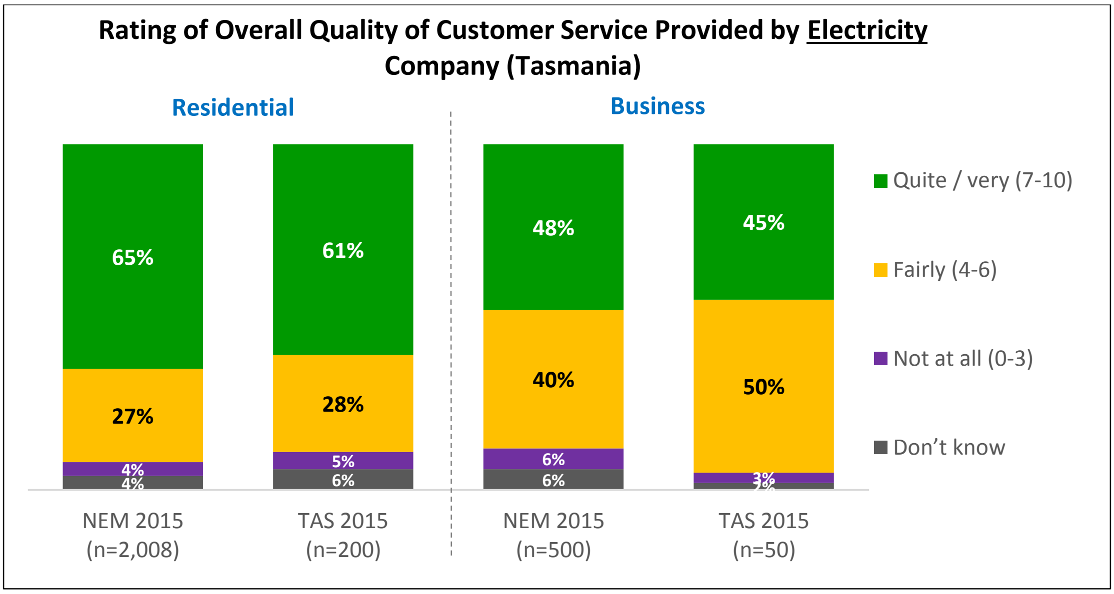


Base: All Respondents
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

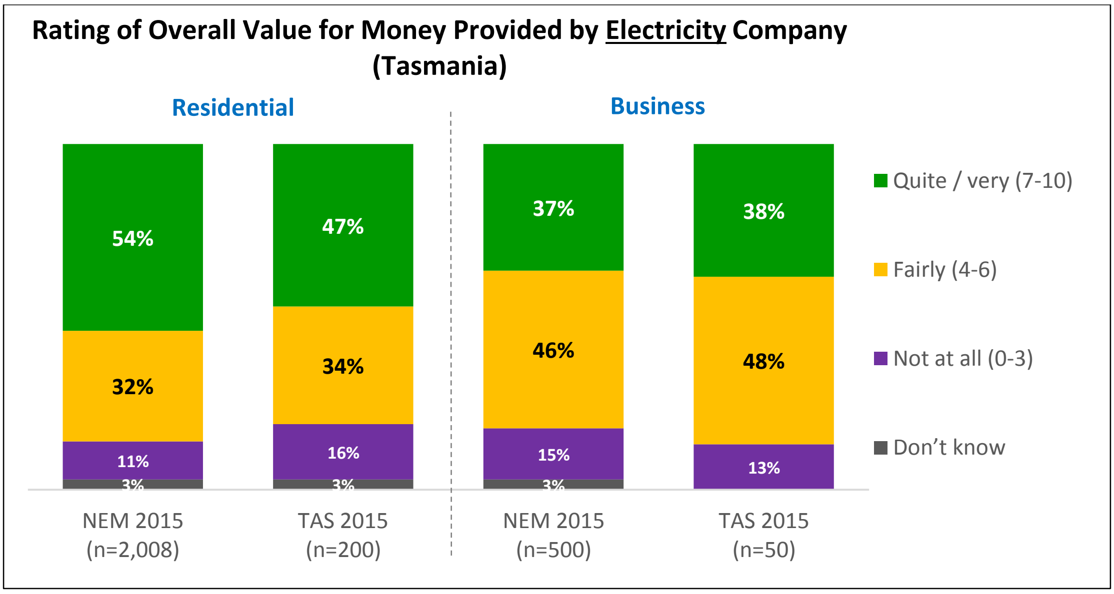
Satisfaction with Electricity Companies



Base: All Respondents
Q2. And how satisfied are you with your current electricity company?



Base: All Respondents (n=200)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.



Base: All Respondents (n=200)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

6.2.4 Information Sources and Gaps

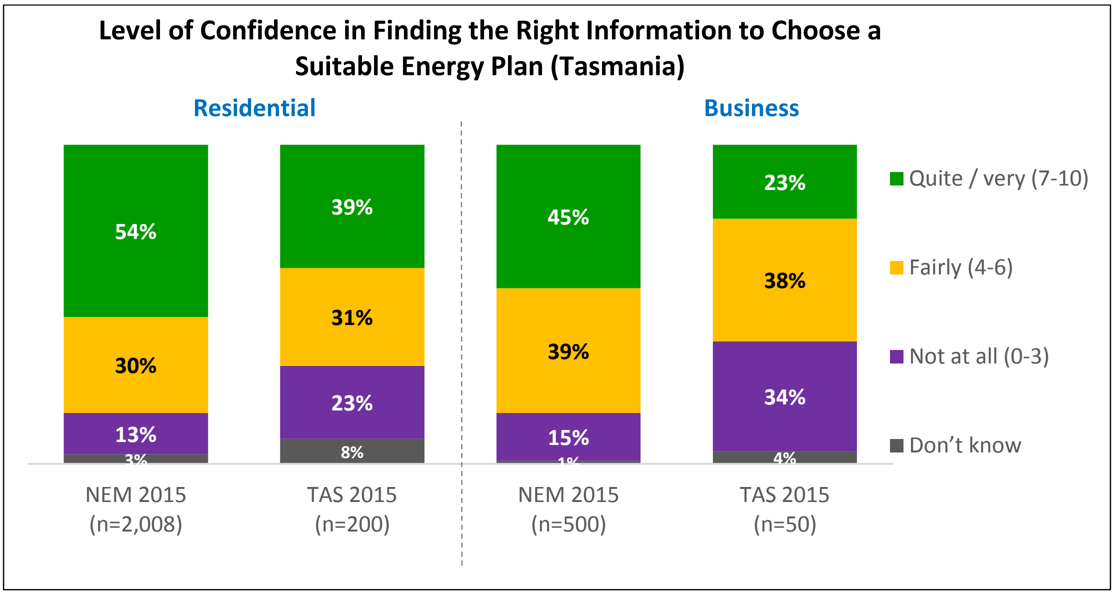
Summary of Findings

Consistent with other NEM jurisdictions the most preferred information sources for finding information about different energy retailers and plans in general were internet based (75% of residents, 84% of small business consumers).

When it comes to confidence in finding the right information to choose a suitable energy plan, around four in ten residential consumers (39%) and around a quarter of small business consumers (23%) were quite or very confident (rating 7 or more out of 10). This result was much lower than the NEM average (54% and 45% respectively). Those living in metropolitan areas were significantly more confident they could find the right information to choose a suitable energy plan compared to those in regional areas.

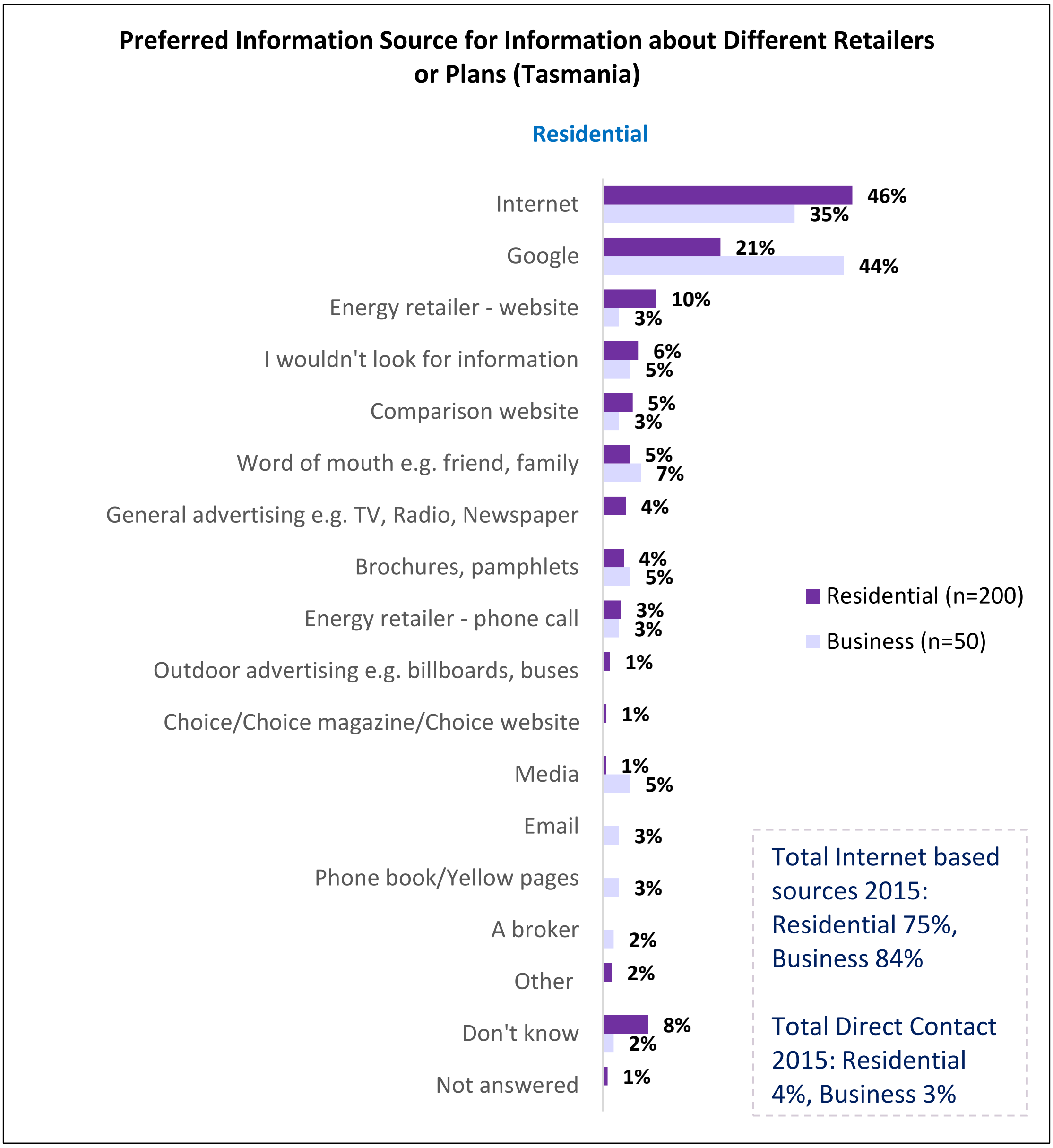
The Results

Adequacy of Information



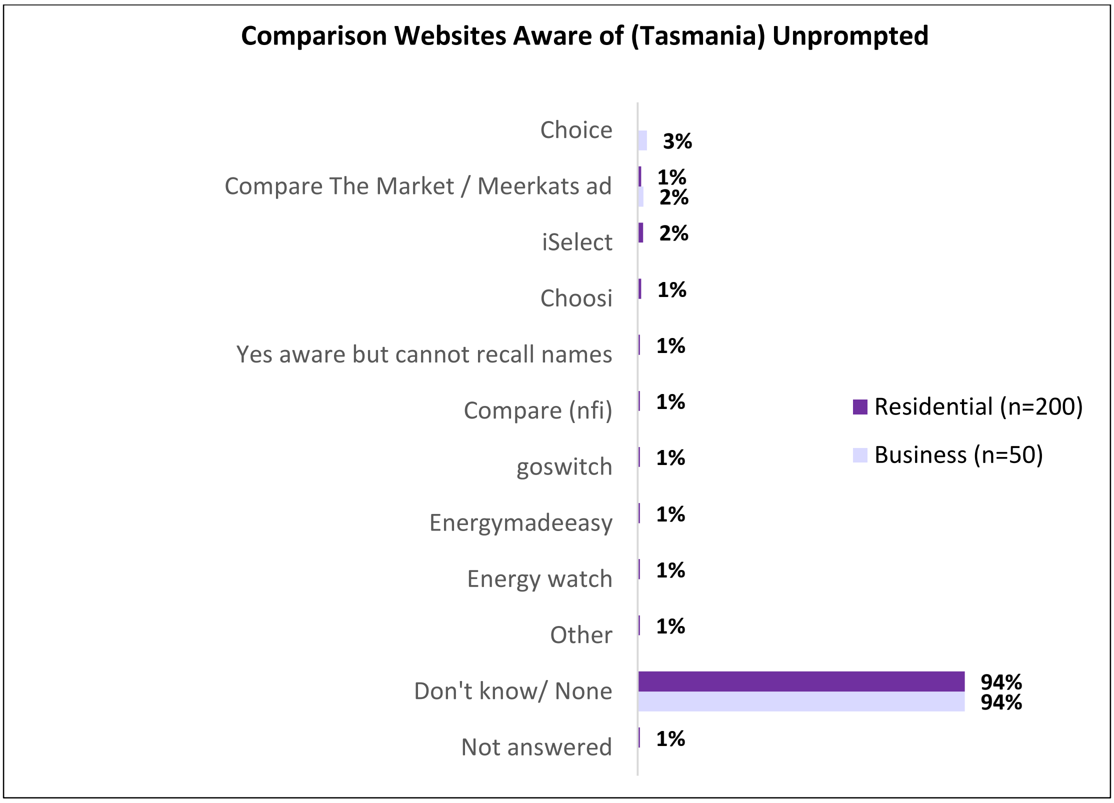
Base: All Respondents
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Preferred Information Sources

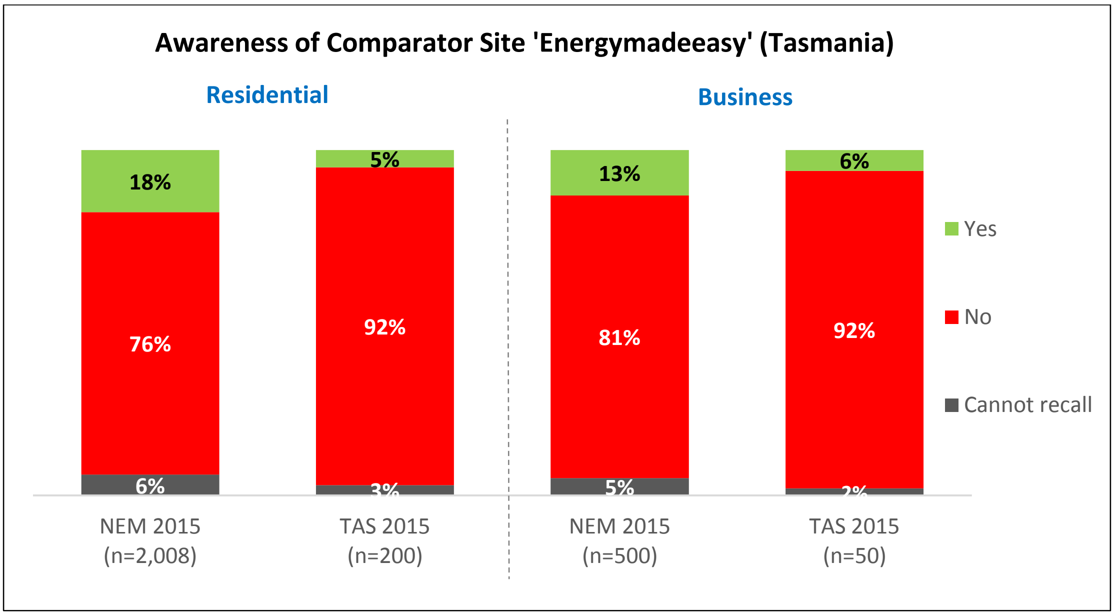


Base: All Respondents
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

Awareness of Comparison Sites



Base: All Respondents
Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? MULTIPLE RESPONSE



Base: All Respondents
Q39. Have you heard of the independent government comparator website called IF NSW / ACT / SA/ TAS: energymadeeasy? IF VIC: Your Choice? IF QLD: QCA Price Comparator?

Appendices

Appendix One: Quantitative Questionnaire

NEWGATE

2015 AEMC Retail Competition Review

Final Questionnaire – CATI Version (Residential Survey)

Wednesday 21st January

Quotas (Residential and Business shown here)

All respondents to be the main or joint decision maker in their household / business when it comes to choosing their energy retailer.

Methodology Quotas (n=)	Residential	Business	Total
CATI	500	500	1,000
Online	1500	-	1500
Total	**2,000**	**500**	**2500**

NB: Please also aim for the quota distributions below <u>within</u> each type of method e.g. 72% of online respondents to be capital city, 28% regional etc.

Location, Gender, Age Quotas (Based on 2011 ABS Census data)

Res/bus	VIC	NSW	ACT	SA	S/E QLD	TAS	Total
Residential	400	400	200	400	400	200	2000
Small Business	100	100	50	100	100	50	500
Total	**500**	**500**	**250**	**500**	**500**	**250**	**2,500**

Location	VIC	NSW	ACT	SA	S/E QLD	TAS	Total
Capital city	375	318	250	385	333	107	1,611
Rest of region	125	182		115	167	143	589
Total	**500**	**500**	**250**	**500**	**500**	**250**	**2,500**

	VIC	NSW	ACT	SA	S/E QLD	TAS	Total
Has mains gas	Min 100	Min 100	Min 75	Min 100	Min 100	Min 50	Min 100

Age / Gender (Res only)	Males	Females	Total
18-34	300	300	600
35-54	356	370	726
55+	318	356	674
Total	974	**1026**	**2000**

Business size	Total
Less than 20	366
20-99	67
100-199	67
Total	**500**

Business Type	Total
Construction	79
Professional, Scientific and Technical Services	58
Rental, Hiring and Real Estate Services	53
Agriculture, Forestry and Fishing	44
Financial and Insurance Services	39
Retail Trade	33
Transport, Postal and Warehousing	31
Health Care and Social Assistance	26
Manufacturing	20
Accommodation and Food Services	20
Administrative and Support Services	20
Wholesale Trade	19
Other	58
Total	**500**

Screening / qualifier questions

I just have a few questions about you to make sure we are speaking with a good mix of people.

S1. Firstly, do you or does anyone in your immediate family work in any of the following?	1. Market or social research **CLOSE** 2. Advertising or the media **CLOSE** 3. The energy sector (electricity or gas) **CLOSE** 4. **DNRO:** None of these

S2. What is your postcode at home? **CHECK QUOTAS**	1. _ _ _ _ ENTER POSTCODE **AUTOCODE LOCATION,**

S3. **RECORD GENDER, CHECK QUOTAS**	1. Male 2. Female

S4. Are you aged under or over 40 years? And would that be…? **ASK RELEVANT RANGES** **CHECK QUOTAS**	1. Under 18 **CLOSE** 2. 18 to 24 3. 25 to 29 4. 30 to 34 5. 35 to 39 6. 40 to 44 7. 45 to 49 8. 50 to 54 9. 55 to 59 10. 60 to 64 11. 65 to 74 12. 75 or over 13. **DNRO:** REFUSED **CLOSE**

CLOSING SPIEL: Thank you for your time today. We have already surveyed enough people with your characteristics, so that is all of my questions. I hope you can participate in another survey in future. If you wish to contact us for any reason, please call (03) 8789 4444.

Main Survey – About the home

Now for the main questions. We'll start with some questions about your energy company.

Q1. What is the name of the company that you buy electricity from? That is, the company that sends you your electricity bill. **SINGLE RESPONSE, DO NOT READ OUT**	1. ActewAGL 2. AGL Energy 3. Alinta Energy 4. Australian Power and Gas 24. Aurora Energy 5. BlueNRG 6. Click Energy 25. Commander Power and Gas 7. Diamond Energy 8. Dodo Power and Gas 9. Energy Australia 10. Ergon Energy 26. ERM Power 27. Go Energy 11. Lumo Energy 12. Momentum Energy 13. Neighbourhood Energy 14. Origin Energy 15. People Energy 16. Power Direct 17. Power Shop 18. Qenergy 19. Red Energy 20. Sanctuary Energy 21. Simply Energy 22. Other (specify)___________ 23. Don't know

Q2. And how satisfied are you with your current electricity company? **SINGLE RESPONSE, READ OUT** **IF NECESSARY**: **[INSERT FROM Q1]**	1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. **DNR:** Don't know

Q3. WORDING CHANGE: How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. **SINGLE RESPONSE**											
Very poor					Fair					Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company? **REPEAT SCALE IF NECESSARY, SINGLE RESPONSE**											
Very poor					Fair					Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q5. Does your home currently have piped natural gas and by that I mean mains connected gas, not bottled gas? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

IF HAS GAS CONNECTED (Q5=1)

Q6. What is the name of the company that you buy mains connected gas from? That is, the company that sends you your gas bill **SINGLE RESPONSE**	1. ActewAGL Retail 2. AGL Energy 3. Alinta Energy 14. Aurora Energy 4. Australian Power and Gas 5. Dodo Power and Gas 6. Energy Australia 7. Lumo Energy 8. Origin Energy 9. Red Energy 10. Simply Energy 13. Tas Gas Retail 11. Other (specify)________________ 12. Don't know

Q7. How satisfied are you with your current gas company? **SINGLE RESPONSE, READ OUT** **IF NECESSARY: [INSERT FROM Q6]**	1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. **DNR:** Don't know

Q8. **WORDING CHANGE:** How would you rate the overall quality of <u>customer</u> service provided by your <u>gas company</u>? Please use a scale where 0 means very poor and 10 is excellent. **SINGLE RESPONSE**											
Very poor					Fair					Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q9. Using the same scale, how would you rate the overall value for money of the products and services provided by your gas company? **REPEAT IF NECESSARY**											
Very poor					Fair					Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Interest and Knowledge

ASK ALL

Q10.	**QUESTION REMOVED**

Q11.	**QUESTION REMOVED**

Q12.	**QUESTION REMOVED**

Q13. Please tell me whether you think the following statements are True or False. Firstly, … **READ NEXT ITEM**

RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM	True	False	Don't know
a. Consumers in your state **[if ACT]** or territory can choose their electricity company	1	2	3
b. **IF HAS GAS (Q5=1)** Consumers in your state **[if ACT]** or territory can choose their gas company	1	2	3
c. **NEW QUESTION:** Consumers in your state **[if ACT]** or territory can choose from a range of different types of electricity plans, price structures, contract lengths and terms	1	2	3
d. **NEW QUESTION:** **IF HAS GAS (Q5=1)** Consumers in your state **[if ACT]** or territory can choose from a range of different types of gas plans, price structures, contract lengths and terms	1	2	3

ASK IF Q13A = TRUE

Q14. As far as you're aware, how many different electricity companies are available for you to choose from in your state **[if ACT]** or territory? **IF NECESSARY:** your best guess is fine **DO NOT READ OUT**	1. None / didn't realise you could choose 2. _ _ **ALLOW 1 TO 99** 3. Don't know

ASK IF Q13B = TRUE

Q15. As far as you're aware, how many different gas companies are available for you to choose from in your state or territory? **IF NECESSARY**: your best guess is fine **DO NOT READ OUT**	1. None / didn't realise you could choose 2. _ _ **ALLOW 1 TO 99** 3. Don't know

ASK ALL

Q46. **NEW QUESTION:** When it comes to the energy options and offers available in your state **[if ACT]** or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident.											
Not at all confident										Extremely confident	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state **[if ACT]** or territory? **SINGLE RESPONSE, READ OUT**	1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. **DNR:** Don't know

Switching Behaviours

ASK ALL

Q17. A) In the past 5 years, how many times have you changed the following? **ASK Q17B IMMEDIATELY AFTER EACH CODE IF Q17A NOT ZERO AT EACH** **NEW QUESTION:** B) **IF Q17A=1**: And was that in the last 12 months? **IF Q17A>1** And of those [INSERT from Q17A] times how many were in the past 12 months? **READ OUT, FOR EACH ITEM, ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99, INCLUDE N/A and D/K**	1. Your electricity company _ _ 2. The electricity plan you were on with your existing company _ _ 3. **IF HAS GAS (Q5=1)** Your gas company _ _ 4. **IF HAS GAS (Q5=1)** The gas plan you were on with your existing company _ _

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas? **DO NOT READ OUT**	1. Yes 2. No 3. Cannot recall

ASK IF Q18=1

Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?	1. _ _ _ **ALLOW 1 TO 99** 2. Cannot recall

ASK ALL

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?	1. Yes 2. No 3. Don't know

Q21. **QUESTION REMOVED**	

Switching Electricity

ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0)

Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Wanted a cheaper price 2. Was offered a discount or better price 3. Was offered a good incentive 4. Was approached by a door-to-door sales person 5. Was approached over the phone 6. Got a high energy bill and wanted to change 7. Had a bad experience with the previous company 8. Came to the end of my existing contract and wanted to change 9. Moved house 10. Moved out of home 11. Unhappy with customer service 12. Recommendation from a consumer organisation 13. Recommendation from family/friend 14. Wanted to have gas and electricity with the same company 15. Heard of a good comparison website 16. Got a smart meter so moved to a time of use tariff 17. Got solar panels (Solar PV) 26. Got a solar hot water system 18. Was transferred / switched without my consent 19. Wanted Green Power 20. My company was taken over or sold 21. Received a series of higher than expected bills 22. Dissatisfied with previous company (general) 25. Wanted / was offered a good solar rebate 27. Preferred billing arrangements 23. Other (specify)________ 24. Don't know

Q23. **WORDING CHANGE:** The last time you changed your electricity company or plan, which information sources did you use to help with your decision? Any others? **DO NOT READ OUT, RECORD BEST FIT, MULTIPLE RESPONSE**	1. Did not use any information sources 2. Door-to-door sales person visiting the home 3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)________ 9. A friend or family member 10. Media article/advertisement segment

OK	11. General advertising e.g. TV, Radio, Newspaper advertisement 12. Outdoor advertising e.g. billboards, buses 13. Financial counsellor 14. Community support organisation 15. Looked at price / best price / saving 18. A broker 19. A 1-2 page price fact sheet (in the mail or online) that outlines the prices, fee structures, terms, conditions and other details about the offer or plan 16. Other (specify)_______ 17. Don't know

Q47. **NEW QUESTION:** And thinking about the information sources you used when changing your electricity company or plan, which one was most useful in helping with your decision to switch? **DO NOT READ OUT** **RECORD BEST FIT** **SINGLE RESPONSE**	1. None of them were useful 2. Door-to-door sales person visiting the home 3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)_______ 9. A friend or family member 10. Media article/advertisement segment 11. General advertising e.g. TV, Radio, Newspaper advertisement 12. Outdoor advertising e.g. billboards, buses 13. Financial counsellor 14. Community support organisation 15. Looked at price / best price / saving 18. A broker 19. A 1-2 page price fact sheet (in the mail or online) that outlines the prices, free structures, terms, conditions and other details about the offer or plan 16. Other (specify)_______ 17. Don't know

ASK IF AT Q23 OR Q47 CODE 19 NOT SELECTED

Q48. **NEW QUESTION:** The last time you investigated changing your <u>electricity</u> company or plan, did you use a price fact sheet to understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.	1. Yes 2. No 3. Don't know

ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0)

Q49. **NEW QUESTION:** I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your electricity company or plan where 0 means not at all and 10 means extremely important? **RANDOMISE, REPEAT IF NECESSARY, ADD CODE 12=Not Applicable**

a) The price per kilowatt hour (kWh)
b) The estimated total bill amount
c) Contract duration
d) Whether you are locked into a contract
e) The discounts offered
f) The amount I would have to pay to exit the contract early (exit fee or termination fee)
g) Availability of green energy plans
h) The solar feed-in tariff on offer
i) Whether the price per kilowatt hour (kWh) can change during the contract

Not at all important										Extremely important	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q24. **QUESTION REMOVED**	

ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0)

Q50. NEW QUESTION: And having switched your electricity company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.

IF NECESSARY: Please just think about the last time you switched **RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM**

	Agree strongly	Agree somewhat	Neither agree / disagree	Disagree somewhat	Disagree strongly	Don't know
a. The last time I switched I was happy with the decision	1	2	3	4	5	6
b. I would recommend switching to my family and friends	1	2	3	4	5	6
c. I got what I expected after I switched	1	2	3	4	5	6

ASK IF SOMEWHAT DISAGREE OR STRONGLY DISAGREE WITH Q50A

Q25. NEW QUESTION: What were the main reasons why you were not happy with your decision to switch? **RECORD VERBATIM**	**OPEN ENDED RESPONSE**

ASK IF SOMEWHAT AGREE OR STRONGLY AGREE WITH Q50A

Q25B. NEW QUESTION: What were the main reasons why you were happy with your decision to switch? **RECORD VERBATIM**	**OPEN ENDED RESPONSE**

ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0)

Q51. NEW QUESTION: The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? **SINGLE RESPONSE, READ OUT**	1. Very easy 2. Fairly easy 3. Neither easy nor difficult 4. Fairly difficult 5. Very difficult 6. **DNR**: Don't know 7. **DNR**: Cannot recall

Switching Gas

Q26. **QUESTION REMOVED**	

ASK IF SWITCHED GAS COMPANY OR PLAN IN THE PAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q27. You mentioned you changed your gas company or plan in the past five years. The last time you switched, what was the main reason? Any other reasons? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Wanted a cheaper price 2. Was offered a discount or better price 3. Was offered a good incentive 4. Was approached by a door-to-door sales person 5. Was approached over the phone 6. Got a high energy bill and wanted to change 7. Had a bad experience with the previous company 8. Came to the end of my existing contract and wanted to change 9. Moved house 10. Moved out of home 11. Unhappy with customer service 12. Recommendation from a consumer organisation 13. Recommendation from family/friend 14. Wanted to have gas and electricity with the same company 15. Heard of a good comparison website 16. Got a smart meter so moved to a time of use tariff 17. REMOVED CODE 18. Was transferred / switched without my consent 19. Wanted Green Power 20. My company was taken over or sold 21. Received a series of higher than expected bills 22. Dissatisfied with previous company (general) 26. Preferred billing arrangements 23. Other (specify)________ 24. Don't know

Q28. WORDING CHANGE: The last time you changed your <u>gas</u> company or plan, what information sources did you use to help with your decision? Any others? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Did not use any information sources 2. Door-to-door sales person visiting the home 3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)_______ 9. A friend or family member 10. Media article/advertisement segment 11. General advertising e.g. TV, Radio, Newspaper advertisement 12. Outdoor advertising e.g. billboards, buses 13. Financial counsellor 14. Community support organisation 15. Looked at price / best price / saving 18. A broker 21. A 1-2 page price fact sheet (in the mail or online) that outlines the prices, fee structures, terms, conditions and other details about the offer or plan 19. Other (specify)_______ 20. Don't know

Q52. NEW QUESTION: And thinking about the information sources you used when changing your gas company or plan, which one was most useful in helping with your decision to switch? **DO NOT READ OUT** **RECORD BEST FIT** **SINGLE RESPONSE**	1. None of them were useful 2. Door-to-door sales person visiting the home 3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)_______ 9. A friend or family member 10. Media article/advertisement segment 11. General advertising e.g. TV, Radio, Newspaper advertisement 12. Outdoor advertising e.g. billboards, buses 13. Financial counsellor 14. Community support organisation

	15. Looked at price / best price / saving 18. A broker 21. A 1-2 page price fact sheet (in the mail or online) that outlines the prices, fee structures, terms, conditions and other details about the offer or plan 19. Other (specify)________ 20. Don't know

ASK IF AT Q28 OR Q52 CODE 21 NOT SELECTED

Q53. **NEW QUESTION:** The last time you investigated changing your gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.	1. Yes 2. No 3. Don't know

ASK IF SWITCHED GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q54. **NEW QUESTION:** I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your gas company or plan where 0 means not at all and 10 means extremely important? **RANDOMISE, REPEAT IF NECESSARY, ADD CODE 12=Not Applicable**

a) The price per mega joule (MJ)
b) The estimated total bill amount
c) Contract duration
d) Whether you are locked into a contract
e) The discounts offered
f) The amount I would have to pay to exit the contract early (exit fee or termination fee)
j) Whether the price per mega joule (MJ) can change during the contract

Not at all important										Extremely important	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q29. **QUESTION REMOVED**	

ASK IF SWITCHED GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q55. **NEW QUESTION:** And having switched your gas company or plan, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.

IF NECESSEARY: Please think about the last time you switched **RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM**

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
a. The last time I switched I was happy with the decision	1	2	3	4	5	6
b. I would recommend switching to my family and friends	1	2	3	4	5	6
c. I got what I expected after I switched	1	2	3	4	5	6

ASK IF SOMEWHAT DISAGREE OR STRONGLY DISAGREE WITH Q55A

Q30. **NEW QUESTION:** What were the main reasons why you were not happy with your decision to switch? **RECORD VERBATIM**	**OPEN ENDED RESPONSE**

ASK IF SOMEWHAT AGREE OR STRONGLY AGREE WITH Q55A

Q30BB. **NEW QUESTION:** What were the main reasons why you were happy with your decision to switch? **RECORD VERBATIM**	**OPEN ENDED RESPONSE**

ASK IF SWITCHED GAS COMPANY OR PLAN IN THE PAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q56. **NEW QUESTION:** The last time you switched your <u>gas</u> company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? **SINGLE RESPONSE, READ OUT**	1. Very easy 2. Fairly easy 3. Neither easy nor difficult 4. Fairly difficult 5. Very difficult 6. **DNR**: Don't know 7. **DNR**: Cannot recall

Investigated but Did not switch

ASK IF NOT SWITCHED BUT INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20 =1)

Q31. **WORDING CHANGE:** You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your investigation? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Did not use any information sources 2. Door-to-door sales person visiting the home 3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)________ 9. A friend or family member 10. Media article/advertisement segment 11. General advertising e.g. TV, Radio, Newspaper advertisement 12. Outdoor advertising e.g. billboards, buses 13. Financial counsellor 14. Community support organisation 15. Looked at price / best price / saving 18. A broker 21. A 1-2 page price fact sheet (in the mail or online) that outlines the prices, fee structures, terms, conditions and other details about the offer or plan 16. Other (specify)________ 17. Don't know

Q57. **NEW QUESTION:** And thinking about the information sources you used when investigating different offers or options, which one was <u>most</u> useful in helping with your decision whether or not to switch?	1. Did not use any information sources 2. Door-to-door sales person visiting the home

DO NOT READ OUT **RECORD BEST FIT** **SINGLE RESPONSE**	3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)_______ 9. A friend or family member 10. Media article/advertisement segment 11. General advertising e.g. TV, Radio, Newspaper advertisement 12. Outdoor advertising e.g. billboards, buses 13. Financial counsellor 14. Community support organisation 15. Looked at price / best price / saving 18. A broker 21. A 1-2 page price fact sheet (in the mail or online) that outlines the prices, fee structures, terms, conditions and other details about the offer or plan 16. Other (specify)_______ 17. Don't know

ASK IF AT Q31 CODE 21 IS NOT SELECTED

Q58. **NEW QUESTION:** The last time you investigated changing your electricity or gas company or plan, did you use a price fact sheet to help understand the details of the offer? That is, a 1-2 page sheet available on retailer websites or comparator websites that outlines the prices, fee structures, terms, conditions and other details about the offer or plan.	1. Yes 2. No 3. Don't know

Q32. And what was the main reason why you investigated different offers and options but haven't changed your energy company or plan in the last 12 months? Any others? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. No particular reason 2. Too busy / I don't have time 3. Too much hassle / couldn't be bothered / too lazy 4. Too confusing 5. Lack of information on best deals available 6. They are all the same / it would make no difference to the price I pay 7. The new company would eventually increase their prices anyway 8. Didn't know you could change company or plan 9. No other options / alternatives available 10. I am on a contract 11. I didn't want to enter into a contract 12. The company I looked into didn't offer gas / wanted to have electricity and gas with the same company 13. The saving wasn't worth the effort 14. My existing company matched the offer / gave me a better offer so I stayed with them 15. Happy with current retailer 16. Happy with current arrangements 17. I wouldn't know where to get credible information 18. I don't trust what the energy companies say 19. I feel pressured by energy companies 20. CODE REMOVED 24. Did not want to lose my solar bonus / feed-in tariff 25. Did not want to pay exit / penalty fees for leaving my contract early 26. Couldn't get an offer because I have solar 27. My company/plan had a better discount/cheaper price 21. My bill is too low to bother 22. Other (specify)________ 23. Don't know

Did not Switch or Investigate offers

ASK IF NOT SWITCHED OR INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20=2 OR 3)

Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. No particular reason 2. Too busy / I don't have time 3. Too much hassle / couldn't be bothered / too lazy 4. Too confusing 5. Lack of information on best deals available 6. They are all the same / it would make no difference to the price I pay 7. The new company would eventually increase their prices anyway 8. Didn't know you could change company or plan 9. No other options / alternatives available 10. I am on a contract 11. I don't want to enter into a contract 12. Happy with current retailer 13. Happy with current arrangements 14. I wouldn't know where to get credible information 15. I don't trust what the energy companies say 16. I feel pressured by energy companies 17. CODE REMOVED 18. My bill is too low to bother 21. Do not want to lose my solar bonus / feed in tariff 26. Couldn't get an offer because I have solar 22. Do not want to pay exit / penalty fees for leaving my contract early 19. Other (specify)_______ 20. Don't know

Future Intentions

ASK ALL

Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household? **SINGLE RESPONSE, READ OUT**	1. We are currently looking for a better deal 2. We would be interested in switching to a better deal but are not currently looking 6. We recently switched energy provider or plan and so probably won't look for a better deal for a while 3. We are not interested in switching our energy provider or plan 4. **DNRO:** Other (specify)______ 5. **DNRO:** None of the above

Q35. **QUESTION REMOVED**

Q36. WORDING CHANGE: How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident **REPEAT SCALE IF NECESSARY, SINGLE RESPONSE**											
Not at all confident					Fairly Confident					Extremely confident	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q37. If you wanted to look for information about different energy retailers or plans, what would be your **MOST** preferred method or source of information? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK, RECORD FIRST MENTION**	1. I wouldn't look for information 2. Brochures, pamphlets 3. Google 4. Energy retailer – phone call 5. Energy retailer – website 6. Energy retailer – door-to-door salesperson 7. Comparison website 8. Media 9. Word of mouth e.g. friend, family 10. Financial counsellor 11. Community support organisation 12. General advertising e.g. TV, Radio, Newspaper advertisement 13. Outdoor advertising e.g. billboards, buses 16. A broker 14. Other (specify)_______ 15. Don't know

Q59. **NEW QUESTION:** Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
a. I generally don't trust energy companies that promise a better deal	1	2	3	4	5	6
b. I'm concerned that if I switch energy company or plan there might be hidden fees and charges	1	2	3	4	5	6
c. I would switch my energy company if I was not satisfied with my current company	1	2	3	4	5	6
d. I would prefer to try and save energy to reduce my bill than to seek out a better deal	1	2	3	4	5	6
e. The amount of money I could save is not worth the time and effort involved in switching	1	2	3	4	5	6
f. It is too complicated to try and compare the various options and offers available	1	2	3	4	5	6
g. I can't be bothered looking for a better deal	1	2	3	4	5	6

Q60. **NEW QUESTION:** What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?	**$ _ _ _ _** Enter amount to nearest dollar

IF HAS GAS (Q5=1)

Q61. **NEW QUESTION:** What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?	**$ _ _ _ _** Enter amount to nearest dollar

Comparison Websites

ASK ALL

Q38. Are you aware of any comparison websites that can help customers choose a good energy deal for their home? Any others? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Choice 2. Choosi 3. Compare The Market 4. Electricity Wizard 5. Energy watch 6. Energymadeeasy 7. goswitch 8. iSelect 9. Make it Cheaper 10. Myenergyoffers 11. My Power Planner 12. One Big Switch 24. Power in your hands 13. QCA Price Comparator 14. CODE REMOVED 15. Switch On 16. Switchwise 25. Take charge 17. U Choose 18. youcompare 19. Your Choice 26. yourenergy.nsw.gov.au 20. Yahoo Energy Comparison 21. None of the above 22. Other (specify)_______ 23. Don't know

IF NSW / ACT / SA / TAS: ASK IF NOT MENTIONED "energymadeeasy" (Q38 ≠ 6)

IF VIC: ASK IF NOT MENTIONED "Your Choice" (Q38 ≠ 19)

IF QLD: ASK IF NOT MENTIONED "QCA Price Comparator" (Q38 ≠ 1213)

Q39. Have you heard of the independent government comparator website called **IF NSW / ACT / SA/ TAS:** energymadeeasy? **IF VIC:** Your Choice? **IF QLD: QCA** Price Comparator? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

IF VIC: ASK IF NOT MENTIONED "My Power Planner" or "Switch On" (Q38 ≠ 11 or 15)

Q40. Have you heard of the independent government comparator website called My Power Planner which is on the Switch On website? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

IF QLD: ASK IF NOT MENTIONED "Take Charge" (Q38 ≠ 25)

Q62. **NEW QUESTION:** Have you heard of the government campaign Take Charge? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

IF NSW: ASK IF NOT MENTIONED "yourenergy.nsw.gov.au" or "Power in Your Hands" (Q38 ≠ 24 or 26)

Q63. **NEW QUESTION:** Have you heard of the Power is in your Hands campaign or the government website called yourenergy.nsw.gov.au? **MULTIPLE RESPONSE**	1. Yes, Power in your hands campaign 2. Yes, yourenergy.nsw.gov.au 3. No 4. Don't know

Demographics

I just have some final questions about you and your household before we finish the survey. These are for analysis purposes only.

D1. Do you own or rent the home where you live? **SINGLE RESPONSE, IF OWN, ASK IF OUTRIGHT OR PAYING A MORTAGE.**	1. Paying off a mortgage 2. Own outright 3. Renting 4. Other (please specify)___________

D2. Including you, how many people live in your household? **ALLOW TWO DIGIT RESPONSE. DO NOT ALLOW 0**	_ _

D3. How much was your most recent quarterly electricity bill? **IF NECESSARY:** Your best estimation of the cost is fine. **IF BILLED MONTHLY:** refer to relevant bracket **SINGLE RESPONSE, DO NOT READ OUT**	1. Less than \$100 (< \$33 per month) 2. \$100 - \$199 (\$33 - <\$67 per month) 3. \$200 - \$299 (\$67 - <\$100 per month) 4. \$300 - \$399 (\$100 - <\$133 per month) 5. \$400 - \$499 (\$133- <\$167 per month) 6. \$500 - \$599 (\$167 - <\$200 per month) 7. \$600 - \$699 (\$200 - <\$233 per month) 8. \$700 - \$799 (\$233 - <\$267 per month) 9. \$800 - \$999 (\$267 - <\$333 per month) 10. \$1,000 or more (\$333 or more per month) 11. Don't know 12. Refused

D13. **NEW QUESTION:** Does your household receive a government rebate or concession on your electricity bill? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know 4. Prefer not to say

D14. **NEW QUESTION:** Does your household have any special payment arrangements with your electricity retailer, such as weekly, fortnightly or monthly instalments as a result of financial hardship? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know 4. Prefer not to say

D15. NEW QUESTION: Are you currently experiencing any financial difficulty paying your electricity bill? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know 4. Prefer not to say

IF HAS GAS CONNECTED (Q5=1)

D4. How much was your most recent quarterly gas bill? **IF NECESSARY:** Your best estimation of the cost is fine. **IF BILLED MONTHLY:** refer to relevant bracket **SINGLE RESPONSE, DO NOT READ OUT**	1. Less than $100 (< $33 per month) 2. $100 - $199 ($33 - <$67 per month) 3. $200 - $299 ($67 - <$100 per month) 4. $300 - $399 ($100 - <$133 per month) 5. $400 - $499 ($133- <$167 per month) 6. $500 - $599 ($167 - <$200 per month) 7. $600 - $699 ($200 - <$233 per month) 8. $700 - $799 ($233 - <$267 per month) 9. $800 - $999 ($267 - <$333 per month) 10. $1,000 or more ($333 or more per month) 11. Don't know 12. Refused

D16. NEW QUESTION: Does your household receive a government rebate or concession on your gas bill? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know 4. Prefer not to say

D17. NEW QUESTION: Does your household have any special payment arrangements with your gas retailer, such as weekly, fortnightly or monthly instalments as a result of financial hardship? **SINGLE RESPONSE. CLARIFY**	1. Yes 2. No 3. Don't know 4. Prefer not to say

D18. NEW QUESTION: Are you currently experiencing any financial difficulty paying your gas bill? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know 4. Prefer not to say

ASK ALL

D5. Does your household have solar panels or solar hot water? **MULTIPLE RESPONSE**	1. Yes – solar panels 4. Yes – solar hot water system 2. No 3. Don't know

IF YES (Code 1) AT D5

D5a. How much is the solar feed-in tariff that you receive (in cents per kwh)? **SINGLE RESPONSE**	1. _ _ **ALLOW TWO DIGITS** 2. I do not receive a solar feed-in 3. **DNR** Don't know

IF YES (Code 1) AT D5

D5b. Do you have a gross or net solar meter? **SINGLE RESPONSE**	1. Gross 2. Net 3. **DNR**: Something else (specify)___ 4. **DNR**: Don't know

ASK ALL

D6. Does your household have a time of use meter which is also known as a smart meter or interval meter? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

ASK ALL

D6a. **NEW QUESTION:** And do you have a time of use tariff which includes different rates for different times of the day? **SINGLE RESPONSE**	1. Yes 2. No 3. **DNR** Don't know

ASK ALL

D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services? **RANDOMISE 1-7, READ OUT, FOR EACH ITEM, ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99, INCLUDE N/A and D/K**	1. Home phone 2. Mobile phone 3. Internet 4. Car insurance 5. Home insurance 6. Health insurance 7. Banking 8. **DNRO:** Other (specify)____ 9. **DNRO:** None of the above

ASK FOR EACH OF CODES 1-7 SELECTED AT D7

D7A. **NEW QUESTION:** The last time you changed your **[INSERT FROM D7]** provider, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? **SINGLE RESPONSE, REPEAT SCALE IF NECESSARY**	1. Very easy 2. Fairly easy 3. Neither easy nor difficult 4. Fairly difficult 5. Very difficult 6. **DNR**: Don't know 7. **DNR**: Cannot recall

D8. **QUESTION REMOVED**	

D9. Using a scale where zero means not at all and ten means extremely, how comfortable are you with using the internet? **SINGLE RESPONSE**

Not at all comfortable					Fairly					Extremely comfortable	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

D10. What is your current employment status? **ONLY READ OUT IF NECESSARY** **MULTIPLE RESPONSE OK**	1. Working full time 2. Working part time 3. Working casually 4. Self-employed 5. Unemployed 6. Retired 7. Student (check if also working) 8. Home duties 9. Other (specify)___________

D11. **QUESTION REMOVED**	

D19. **NEW QUESTION:** Finally, which of these brackets best describes your household's total annual income, before tax, including any government payments? Stop me when I get there. **SINGLE RESPONSE**	1. Less than \$20,000 2. Between \$20,000 and \$34,999 3. Between \$35,000 and \$49,999 4. Between \$50,000 and \$59,999 5. Between \$60,000 and \$69,999 6. Between \$70,000 and \$79,999 7. Between \$80,000 and \$99,999 8. Between \$100,000 and \$119,999 9. Between \$120,000 and \$149,999 10. Between \$150,000 and \$199,999 11. \$200,000 or more 12. **DNR**: Don't know 13. **DNR:** Refused

Closing

That is all of my questions. Just to remind you, my name is **[INSERT INTERVIEWER NAME]** from Australian Fieldwork Solutions. Could I please have your first name so that we can re-contact you if necessary as part of our quality control to validate that this interview actually took place? **RECORD**

And can I confirm that I have dialed **INSERT PHONE NUMBER**? Please be assured that your name and contact details will be removed from your responses to this survey once the validation period is finished. As mentioned earlier, this study is being conducted on behalf of the Australian Energy Market Commission and the results will be used to assess the effectiveness of retail competition in your state **[if ACT]** or territory.

IF NECESSARY: Just to remind you, your responses in this survey will be kept completely confidential and will be used only for market research purposes. As a market research company, we comply with the requirements of the Privacy Act. By law, your responses will in no way be linked with your customer account details. Should you need to contact us again please call us on 8789 4444. Thank you again for your time.

Appendix Two: Respondent Profile

Residential Consumers

Category	Sub-group	NEM	VIC	SA	NSW	SEQ	ACT	TAS
	(n=)	*2,008*	*403*	*401*	*402*	*402*	*200*	*200*
Location	Metro	70%	75%	77%	65%	68%	100%	44%
	Regional	30%	25%	23%	35%	32%		56%
Age group	18 – 34	27%	28%	23%	31%	23%	19%	18%
	35 – 54	47%	41%	53%	46%	54%	53%	50%
	55 and over	26%	32%	23%	23%	23%	28%	32%
Gender	Male	46%	49%	40%	47%	43%	48%	44%
	Female	54%	51%	60%	53%	57%	52%	56%
Electricity company	Origin Energy	25%	18%	14%	24%	46%	4%	2%
	AGL Energy	24%	24%	41%	24%	22%	3%	0%
	Energy Australia	18%	15%	10%	32%	6%	8%	0%
	Lumo Energy	6%	11%	8%	4%	4%	1%	1%
	ActewAGL	4%	1%	1%	3%	1%	84%	0%
	Simply Energy	3%	4%	11%	2%	1%	0%	0%
	Dodo Power and Gas	2%	3%	1%	1%	1%	0%	0%
	Australian Power & Gas	1%	1%	2%	2%	1%	0%	2%
	Alinta Energy	1%	2%	4%	1%	0%	0%	1%
	Power Direct	1%	1%	2%	0%	0%	0%	1%
	Momentum Energy	1%	1%	1%	0%	0%	0%	1%
	Diamond Energy	0%	0%	1%	0%	0%	0%	0%
	Sanctuary Energy	0%	0%	1%	0%	0%	0%	0%
	Don't know	2%	2%	2%	3%	3%	1%	2%
Gas	Mains connected	48%	82%	50%	42%	18%	64%	10%
	Not connected	50%	16%	49%	57%	81%	34%	89%
Gas company	AGL Energy	31%	24%	37%	41%	34%	8%	7%
	Origin Energy	19%	19%	29%	13%	37%	0%	10%
	Energy Australia	17%	18%	11%	22%	5%	8%	6%
	Lumo Energy	9%	13%	2%	5%	6%	0%	7%
	ActewAGL Retail	6%	2%	3%	8%	3%	83%	0%
	Red Energy	5%	9%	0%	2%	0%	0%	0%
	Simply Energy	4%	4%	11%	1%	2%	0%	0%
	Dodo Power and Gas	2%	3%	1%	1%	0%	0%	0%
	Australian Power & Gas	2%	1%	1%	2%	5%	0%	13%
	Alinta Energy	2%	2%	4%	1%	2%	0%	0%
	Don't know	1%	2%	1%	1%	4%	0%	0%
Have electricity and gas with same provider	Yes	37%	63%	40%	33%	12%	59%	6%

Category	Sub-group	NEM	VIC	SA	NSW	SEQ	ACT	TAS
Home ownership	Paying off mortgage	33%	32%	37%	34%	34%	36%	30%
	Own home outright	35%	39%	31%	34%	30%	36%	39%
	Renting	31%	29%	31%	30%	35%	27%	28%
	Other	1%	0%	1%	2%	1%	1%	2%
Number in household	One or two	49%	53%	48%	46%	50%	57%	57%
	Three or four	40%	39%	43%	42%	40%	32%	34%
	Five or six	10%	8%	8%	12%	10%	10%	8%
	Seven or more	1%	1%	0%	1%	1%	1%	0%
Employment	Working FT / PT / Cas.	60%	59%	58%	62%	59%	61%	57%
	Retired	20%	22%	18%	18%	19%	22%	23%
	Other	20%	18%	24%	20%	22%	16%	21%
Household income	Low (less than $50k)	29%	32%	34%	25%	28%	21%	41%
	Medium ($50k -<$100k)	34%	33%	32%	35%	36%	36%	34%
	High (more than $100k)	25%	23%	21%	28%	24%	33%	17%
	Don’t know/Refused	12%	12%	14%	12%	12%	9%	8%
Electricity spend (last quarterly bill)	Low (Less than $300)	35%	41%	35%	31%	33%	46%	30%
	Medium ($300 - $399)	33%	36%	33%	34%	29%	28%	34%
	High (more than $400)	23%	15%	20%	24%	30%	16%	28%
	Don’t know / refused	10%	8%	12%	10%	9%	10%	8%
Currently receiving rebate or concession (electricity)	Yes	32%	34%	34%	32%	30%	20%	37%
	No	59%	60%	58%	58%	59%	73%	56%
	Don’t know / refused	9%	6%	8%	10%	11%	7%	7%
Has special payment arrangement (electricity)	Yes	14%	15%	16%	14%	13%	15%	8%
	No	82%	82%	80%	83%	81%	80%	87%
	Don’t know / refused	4%	3%	5%	4%	6%	5%	6%
Currently experiencing difficulty paying (electricity)	Yes	17%	15%	18%	17%	20%	15%	8%
	No	79%	81%	78%	80%	75%	83%	90%
	Don’t know / refused	4%	4%	4%	3%	5%	2%	2%
Gas spend (last quarterly bill)	Low (Less than $200)	12%	14%	9%	11%	2%	13%	7%
	Medium ($200-$299)	53%	56%	56%	51%	45%	48%	50%
	High (more than $300)	25%	19%	25%	30%	36%	28%	33%
	Don’t know / refused	10%	11%	10%	8%	17%	11%	10%
Currently receiving rebate or concession (gas)	Yes	26%	31%	23%	19%	27%	9%	11%
	No	69%	65%	71%	73%	65%	88%	75%
	Don’t know / refused	6%	4%	5%	8%	8%	4%	14%
Has special payment arrangement (gas)	Yes	15%	14%	16%	13%	30%	9%	7%
	No	81%	83%	83%	80%	65%	89%	90%
	Don’t know / refused	4%	2%	2%	7%	5%	3%	3%
Currently experiencing	Yes	16%	12%	21%	16%	29%	12%	7%
	No	82%	84%	77%	81%	69%	87%	90%

Category	Sub-group	NEM	VIC	SA	NSW	SEQ	ACT	TAS
difficulty paying (gas)	Don’t know / refused	3%	3%	2%	2%	2%	1%	3%
Solar	Solar panels	22%	17%	30%	20%	32%	18%	15%
	Solar hot water	12%	8%	12%	12%	15%	13%	6%
	No solar	72%	77%	62%	74%	62%	74%	82%
	Don’t know	1%	0%	1%	1%	1%	1%	0%
Solar feed in tariff	Amount (average)	$0.35	$0.34	$0.37	$0.36	$0.35	$0.37	$0.23
Type of solar meter	Gross	28%	26%	12%	44%	20%	21%	9%
	Net	11%	17%	8%	12%	8%	14%	6%
	Other	1%	1%	1%	1%	1%	4%	5%
	Don’t know	60%	56%	79%	43%	71%	62%	81%
Time of use meter	Yes	29%	66%	13%	16%	14%	6%	9%
	No	53%	24%	66%	64%	63%	73%	74%
	Don’t know	18%	10%	21%	19%	24%	21%	17%
Time of use tariff	Yes	31%	31%	26%	28%	41%	19%	24%
	No	42%	40%	44%	46%	33%	53%	49%
	Don’t know	27%	29%	29%	26%	27%	29%	27%
Comfort using the internet	Not really comfortable (0-4)	3%	4%	3%	4%	3%	3%	3%
	Fairly comfortable (5-7)	19%	16%	20%	19%	22%	15%	19%
	Quite / very comfortable (8-10)	76%	79%	75%	75%	75%	81%	75%
	Don’t know	1%	1%	1%	1%	0%	0%	0%

Small Business Consumers

Category	Sub-group	NEM	VIC	SA	NSW	SEQ	ACT	TAS
	(n=)	*500*	*100*	*100*	*100*	*100*	*50*	*50*
Location	Metro	69%	75%	76%	64%	67%	100%	46%
	Regional	31%	25%	24%	36%	33%		54%
Industry or primary purpose of business	Construction	10%	9%	7%	7%	20%	8%	11%
	Professional, Scientific & Technical	20%	25%	13%	20%	17%	29%	12%
	Rental, Hiring & Real Estate	4%	2%	3%	7%	5%	4%	4%
	Agriculture, Forestry and Fishing	2%	3%	6%	1%	1%	4%	4%
	Financial and Insurance Services	7%	5%	4%	11%	5%	3%	11%
	Retail Trade	12%	11%	18%	13%	9%	2%	7%
	Transport, Postal & Warehousing	1%	0%	1%	2%	1%	3%	0%
	Health Care and Social Assistance	7%	8%	5%	8%	5%	16%	4%
	Manufacturing	4%	9%	10%	0%	4%	0%	11%
	Accommodation & Food Services	4%	3%	5%	5%	2%	5%	16%
	Administrative & Support Services	6%	5%	5%	4%	9%	15%	5%
	Wholesale Trade	5%	4%	11%	5%	4%	3%	5%
	Other	16%	15%	12%	18%	18%	8%	10%
Electricity company	ActewAGL	3%	1%	0%	2%	0%	88%	0%
	AGL Energy	23%	23%	52%	24%	16%	0%	0%
	Alinta Energy	1%	0%	4%	1%	1%	0%	0%
	Australian Power and Gas	0%	0%	0%	1%	0%	0%	0%
	BlueNRG	1%	1%	0%	0%	1%	0%	0%
	Click Energy	2%	1%	0%	1%	5%	0%	0%
	Diamond Energy	0%	0%	0%	0%	1%	0%	0%
	Dodo Power and Gas	0%	0%	0%	1%	0%	0%	0%
	Energy Australia	18%	11%	4%	38%	5%	0%	0%
	Ergon Energy	2%	0%	0%	0%	7%	0%	0%
	Lumo Energy	3%	8%	3%	0%	2%	0%	0%
	Momentum Energy	3%	10%	4%	0%	0%	0%	0%
	Neighbourhood Energy	0%	0%	0%	0%	0%	0%	0%
	Origin Energy	28%	25%	17%	26%	45%	10%	4%
	People Energy	0%	0%	0%	0%	0%	0%	0%
	Power Direct	3%	6%	6%	0%	6%	0%	0%
	Power Shop	0%	1%	0%	0%	0%	0%	0%
	Qenergy	1%	1%	0%	1%	2%	0%	0%
	Red Energy	1%	3%	0%	0%	0%	0%	0%
	Sanctuary Energy	0%	0%	0%	0%	1%	0%	0%
	Simply Energy	1%	3%	4%	0%	1%	0%	0%
	Other	3%	3%	1%	2%	6%	0%	3%
	Don’t know	2%	2%	3%	1%	1%	3%	0%

Category	Sub-group	NEM	VIC	SA	NSW	SEQ	ACT	TAS
Gas	Mains connected	26%	49%	26%	22%	10%	23%	2%
	Not connected	72%	49%	73%	77%	87%	77%	98%
Gas company	ActewAGL Retail	2%	0%	0%	0%	0%	92%	0%
	AGL Energy	45%	36%	48%	66%	14%	8%	0%
	Alinta Energy	1%	0%	0%	0%	9%	0%	0%
	Energy Australia	12%	15%	9%	10%	9%	0%	0%
	Lumo Energy	6%	14%	0%	0%	0%	0%	0%
	Origin Energy	29%	28%	42%	17%	68%	0%	0%
	Simply Energy	1%	2%	0%	0%	0%	0%	0%
	Tas Gas Retail	0%	0%	0%	0%	0%	0%	100%
	Don't know	4%	4%	0%	6%	0%	0%	0%
Premises ownership	Leasing	44%	39%	48%	47%	40%	59%	50%
	Own premises outright	54%	59%	49%	51%	56%	39%	48%
	Other	3%	2%	2%	2%	5%	2%	3%
Number of employees	Less than 20	86%	88%	77%	85%	88%	75%	82%
	20 to 99 employees	13%	12%	22%	12%	11%	25%	14%
	More than 100 employees	1%	0%	1%	2%	1%	0%	3%
Electricity spend (last quarterly bill)	Low (Less than $500)	37%	50%	33%	28%	42%	16%	26%
	Medium ($500 - $999)	28%	24%	18%	32%	30%	35%	19%
	High (more than $1,000)	35%	26%	49%	40%	28%	49%	54%
Gas spend (last quarterly bill)	Low (Less than $159)	52%	62%	29%	40%	55%	47%	0%
	Medium ($160-$349)	24%	20%	32%	26%	29%	25%	100%
	High (more than $350)	24%	18%	39%	34%	16%	28%	0%
Solar	Solar panels	15%	12%	14%	15%	20%	19%	10%
	Solar hot water	9%	7%	6%	10%	9%	10%	5%
	No solar	81%	84%	84%	79%	78%	77%	87%
	Don’t know	0%	0%	1%	0%	0%	2%	0%
Solar feed in tariff	Amount (average)	$0.38	$0.42	$0.42	$0.31	$0.43	$0.37	$0.28
Type of solar meter	Gross	17%	0%	22%	21%	26%	22%	0%
	Net	19%	19%	19%	27%	8%	8%	68%
	Other	11%	13%	0%	14%	10%	0%	0%
	Don’t know	53%	68%	59%	39%	56%	70%	32%
Time of use meter	Yes	31%	74%	12%	14%	18%	11%	10%
	No	54%	13%	71%	70%	65%	65%	84%
	Don’t know	15%	13%	17%	16%	17%	23%	6%
Time of use tariff	Yes	39%	49%	45%	35%	38%	13%	19%
	No	40%	23%	29%	51%	42%	68%	74%
	Don’t know	20%	28%	26%	14%	20%	19%	7%

Appendix Three: NEM Sub-group Tables

Customer Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% Yes) (NEM)	Sub-group	Residents 2015
Total	All residents	89%
Location	Metro	90%
	Regional	87%
Gas	Mains connected	93%
	Not connected	86%
Age Group	18 – 34	86%
	35 – 54	89%
	55 and over	92%
Home Ownership	Renters	89%
	Owners	89%
Household Income	Low (less than $50k)	87%
	Medium ($50k -<$100k)	90%
	High (more than $100k)	89%
Currently receiving rebate or concession (electricity or gas)	Yes	89%
	No	89%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	83%
	No	90%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	86%
	No	90%
Employment	Working FT / PT / Casual	88%
	Retired	91%
	Other	88%
Solar Panels	Yes	88%
	No	89%
Switched Energy Company or Plan	In the past 12 months	96%
	1 to 5 years ago	96%
	NETT switched (last 5 yrs)	96%
	Have not switched at all	82%
Approached by Energy Company	Yes	93%
	No	86%
Actively Investigated Offers	Yes	91%
	No	88%
Electricity Spend (last quarterly bill)	Low (Less than $300)	91%
	Medium ($300 - $399)	92%
	High (more than $400)	87%
Gas Spend (last quarterly bill)	Low (Less than $200)	98%
	Medium ($200-$299)	93%
	High (more than $300)	86%

Base: All Respondents (n=2,008)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose Gas Company (% Yes) (NEM)	Sub-group	Residents 2015
Total	All residents	91%
Location	Metro	91%
	Regional	88%
Gas	Mains connected	91%
	Not connected	N/A
Age Group	18 – 34	89%
	35 – 54	91%
	55 and over	92%
Home Ownership	Renters	91%
	Owners	91%
Household Income	Low (less than $50k)	92%
	Medium ($50k -<$100k)	93%
	High (more than $100k)	90%
Currently receiving rebate or concession (electricity or gas)	Yes	92%
	No	90%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	87%
	No	92%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	89%
	No	91%
Employment	Working FT / PT / Casual	91%
	Retired	92%
	Other	87%
Solar Panels	Yes	89%
	No	91%
Switched Energy Company or Plan	In the past 12 months	95%
	1 to 5 years ago	96%
	NETT switched (last 5 yrs)	95%
	Have not switched at all	85%
Approached by Energy Company	Yes	92%
	No	89%
Actively Investigated Offers	Yes	91%
	No	91%
Electricity Spend (last quarterly bill)	Low (Less than $300)	92%
	Medium ($300 - $399)	93%
	High (more than $400)	90%
Gas Spend (last quarterly bill)	Low (Less than $200)	93%
	Medium ($200-$299)	93%
	High (more than $300)	88%

Base: Respondents with mains connected gas (n=908)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company

Awareness of Being Able to Choose from Different Energy Plans (% Yes) (NEM)	Sub-group	Electricity 2015	Gas 2015
Total	All residents	78%	77%
Location	Metro	80%	77%
	Regional	73%	76%
Gas	Mains connected	82%	77%
	Not connected	75%	N/A
Age Group	18 – 34	78%	79%
	35 – 54	76%	75%
	55 and over	82%	78%
Home Ownership	Renters	77%	76%
	Owners	78%	77%
Household Income	Low (less than $50k)	73%	76%
	Medium ($50k -<$100k)	82%	79%
	High (more than $100k)	81%	81%
Currently receiving rebate or concession (electricity or gas)	Yes	77%	75%
	No	79%	78%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	76%	73%
	No	78%	78%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	75%	75%
	No	79%	77%
Employment	Working FT / PT / Casual	79%	77%
	Retired	80%	78%
	Other	73%	74%
Solar Panels	Yes	77%	71%
	No	78%	78%
Switched Energy Company or Plan	In the past 12 months	88%	80%
	1 to 5 years ago	81%	82%
	NETT switched (last 5 yrs)	84%	81%
	Have not switched at all	72%	72%
Approached by Energy Company	Yes	86%	80%
	No	72%	72%
Actively Investigated Offers	Yes	84%	79%
	No	76%	76%
Electricity Spend (last quarterly bill)	Low (Less than $300)	79%	77%
	Medium ($300 - $399)	83%	75%
	High (more than $400)	78%	81%
Gas Spend (last quarterly bill)	Low (Less than $200)	87%	81%
	Medium ($200-$299)	80%	77%
	High (more than $300)	81%	74%

Base: All Respondents (n=2,008)/ Base: Respondents with mains connected gas (n=908)
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms / d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (NEM)	Sub-group	Residents 2015
Total	All residents	56%
Location	Metro	57%
	Regional	52%
Gas	Mains connected	62%
	Not connected	50%
Age Group	18 – 34	66%
	35 – 54	50%
	55 and over	55%
Home Ownership	Renters	56%
	Owners	56%
Household Income	Low (less than $50k)	53%
	Medium ($50k -<$100k)	57%
	High (more than $100k)	59%
Currently receiving rebate or concession (electricity or gas)	Yes	61%
	No	53%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	72%
	No	53%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	53%
	No	56%
Employment	Working FT / PT / Casual	57%
	Retired	55%
	Other	53%
Solar Panels	Yes	63%
	No	54%
Switched Energy Company or Plan	In the past 12 months	63%
	1 to 5 years ago	51%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	55%
Approached by Energy Company	Yes	62%
	No	52%
Actively Investigated Offers	Yes	66%
	No	51%
Electricity Spend (last quarterly bill)	Low (Less than $300)	56%
	Medium ($300 - $399)	63%
	High (more than $400)	52%
Gas Spend (last quarterly bill)	Low (Less than $200)	60%
	Medium ($200-$299)	63%
	High (more than $300)	65%

Base: All Respondents (n=2,008)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident.

Market Participation

Incidence of Switching or Investigating Offers

In the Last Five Years

Provider (% switched at least once) (NEM)	Residential 2014 (n=1,833)	Residential 2015 (n=2,008)	Business 2014 (n=380)	Business 2015 (n=500)
Electricity Company	48%	39% ↓	47%	44%
Electricity Plan	39%	31% ↓	39%	33%
TOTAL Electricity	**60%**	**50% ↓**	**56%**	**55%**
Gas Company	40%	35% ↓	46%	19%
Gas Plan	30%	24% ↓	50%	16%
TOTAL Gas	**49%**	**40% ↓**	**56%**	**23%**
TOTAL Electricity or Gas	**64%**	**51% ↓**	**57%**	**56%**
Car Insurance	37%	35%	**Not asked of small business consumers**	
Mobile	32%	31%		
Internet	30%	29%		
Home Insurance	22%	26% ↑		
Home Phone	22%	20%		
Banking	18%	19%		
Health Insurance	13%	16%		

Base: All Respondents
Q17. A) In the past 5 years, how many times have you changed the following?
D7. In the last five years, how many times have you changed any of the following providers or companies with which you have products and services?

In the last 12 months

Provider (% switched at least once) (NEM)	Residential (n=2,008)	Business (n=500)
Electricity Company	14%	18%
Electricity Plan	16%	17%
TOTAL Electricity	**22%**	**28%**
Gas Company	17%	10%
Gas Plan	14%	10%
TOTAL Gas	**21%**	**13%**
TOTAL Electricity or Gas	**23%**	**29%**

Base: All Respondents
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Switched Energy Company or Plan (% Yes) (NEM)	Sub-group	Past 5 Years	Past 12 Months	Not Switched
Total	All residents	51%	23%	49%
Location	Metro	50%	23%	50%
	Regional	52%	24%	48%
Gas	Mains connected	55%	29%	45%
	Not connected	48%	18%	52%
Age Group	18 – 34	46%	25%	54%
	35 – 54	51%	22%	49%
	55 and over	55%	24%	45%
Home Ownership	Renters	47%	21%	53%
	Owners	53%	24%	47%
Household Income	Low (less than $50k)	52%	23%	48%
	Medium ($50k -<$100k)	50%	24%	50%
	High (more than $100k)	53%	25%	47%
Currently receiving rebate or concession (electricity or gas)	Yes	56%	27%	44%
	No	48%	21%	52%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	53%	33%	47%
	No	50%	22%	50%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	56%	30%	44%
	No	50%	22%	50%
Employment	Working FT / PT / Casual	51%	23%	49%
	Retired	52%	23%	48%
	Other	50%	23%	50%
Solar Panels	Yes	61%	31%	39%
	No	48%	21%	52%
Approached by Energy Company	Yes	64%	37%	36%
	No	43%	15%	57%
Actively Investigated Offers	Yes	70%	47%	30%
	No	43%	13%	57%
Electricity Spend (last quarterly bill)	Low (Less than $300)	54%	24%	46%
	Medium ($300 - $399)	52%	25%	48%
	High (more than $400)	52%	24%	48%
Gas Spend (last quarterly bill)	Low (Less than $200)	57%	26%	43%
	Medium ($200-$299)	55%	28%	45%
	High (more than $300)	59%	38%	41%

Base: All Respondents (n=2,008)
Q17. A) In the past 5 years, how many times have you changed the following?
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Location	Residential		Small Business	
	Switched Electricity Plan but not company (n=2,008)	Switched Gas Plan but not company (n=908)	Switched Electricity Plan but not company (n=500)	Switched Gas Plan but not company (n=104)
NEM Total	**10%**	**5%**	**11%**	**4%**
Victoria	9%	7%	8%	7%
South Australia	12%	6%	16%	0%
New South Wales	12%	5%	11%	4%
Southeast Queensland	10%	2%	12%	0%
ACT	13%	6%	17%	0%
Tasmania	14%	0%	10%	0%

Base: All Respondents / For gas sample only includes those who have mains connected gas
Q17.
A) In the past 5 years, how many times have you changed the following?

Approached by an Energy Company in Past 12 Months (% Yes) (NEM)	Sub-group	Residents 2015
Total	All residents	39%
Location	Metro	43%
	Regional	30%
Gas	Mains connected	49%
	Not connected	31%
Age Group	18 – 34	36%
	35 – 54	38%
	55 and over	45%
Home Ownership	Renters	37%
	Owners	40%
Household Income	Low (less than $50k)	38%
	Medium ($50k -<$100k)	42%
	High (more than $100k)	43%
Currently receiving rebate or concession (electricity or gas)	Yes	44%
	No	37%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	60%
	No	36%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	50%
	No	37%
Employment	Working FT / PT / Casual	40%
	Retired	42%
	Other	36%
Solar Panels	Yes	46%
	No	37%
Switched Energy Company or Plan	In the past 12 months	63%
	1 to 5 years ago	39%
	NETT switched (last 5 yrs)	50%
	Have not switched at all	29%
Approached by Energy Company	Yes	N/A
	No	N/A
Actively Investigated Offers	Yes	59%
	No	31%
Electricity Spend (last quarterly bill)	Low (Less than $300)	40%
	Medium ($300 - $399)	43%
	High (more than $400)	40%
Gas Spend (last quarterly bill)	Low (Less than $200)	51%
	Medium ($200-$299)	45%
	High (more than $300)	58%

Base: All Respondents (n=2,008)
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Actively Investigated Offers or Options (% Yes) (NEM)	Sub-group	Residents 2015
Total	All residents	31%
Location	Metro	33%
	Regional	26%
Gas	Mains connected	36%
	Not connected	25%
Age Group	18 – 34	32%
	35 – 54	31%
	55 and over	29%
Home Ownership	Renters	26%
	Owners	33%
Household Income	Low (less than $50k)	26%
	Medium ($50k -<$100k)	30%
	High (more than $100k)	39%
Currently receiving rebate or concession (electricity or gas)	Yes	34%
	No	29%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	41%
	No	29%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	40%
	No	29%
Employment	Working FT / PT / Casual	32%
	Retired	28%
	Other	29%
Solar Panels	Yes	43%
	No	27%
Switched Energy Company or Plan	In the past 12 months	62%
	1 to 5 years ago	25%
	NETT switched (last 5 yrs)	42%
	Have not switched at all	19%
Approached by Energy Company	Yes	46%
	No	22%
Actively Investigated Offers	Yes	N/A
	No	N/A
Electricity Spend (last quarterly bill)	Low (Less than $300)	29%
	Medium ($300 - $399)	31%
	High (more than $400)	34%
Gas Spend (last quarterly bill)	Low (Less than $200)	35%
	Medium ($200-$299)	33%
	High (more than $300)	50%

Base: All Respondents (n=2,008)
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Motivations for Switching

Reasons for changing electricity company or plan (NEM)	Total	Has Solar	No Solar
(n=)	861	246	615
TOTAL: Price related reasons	**69%**	**51%**	**75%**
Wanted a cheaper price	50%	39%	54%
Was offered a discount or better price	23%	15%	25%
Moved house	10%	5%	12%
TOTAL: Service related Issues	**8%**	**11%**	**7%**
Unhappy with customer service	4%	5%	4%
TOTAL: Billing / Plan Arrangement Reasons	**4%**	**4%**	**4%**
Got solar panels (Solar PV)	3%	13%	0%
Came to the end of my existing contract and wanted to change	2%	3%	2%
Preferred billing arrangements	2%	3%	2%
Had a bad experience with the previous company	2%	2%	2%
Wanted to have gas and electricity with the same company	2%	2%	2%
My company was taken over or sold	2%	3%	1%
Was offered a good incentive	1%	1%	2%
Reliable supply	1%	5%	0%
Got a high energy bill and wanted to change	1%	1%	2%
Was approached by a door-to-door sales person	1%	1%	2%
Wanted Green Power	1%	1%	1%
Payment plans offered	1%	1%	1%
Wanted / was offered a good solar rebate	1%	3%	0%
Australian company	1%	0%	1%
Was transferred / switched without my consent	1%	1%	1%
Misleading marketing/given misleading information	1%	1%	1%
No contract	0%	0%	1%
Dissatisfied with previous company (general)	0%	1%	0%
Better solar feed in tariff	0%	2%	0%
Other	4%	7%	3%
Don't know	2%	5%	1%
Not answered	1%	3%	0%

Base: Respondents who switched their electricity company or plan
Q22. The last time you switched, what was the main reason you changed your electricity company or plan? Any other reasons?

Ease of comparing offers when changing electricity company or plan (NEM)	Sub-group	NETT Difficult to switch	NETT Easy to switch
Total	All residents	18%	59%
Location	Metro	19%	60%
	Regional	17%	57%
Gas	Mains connected	18%	61%
	Not connected	19%	56%
Age Group	18 – 34	9%	73%
	35 – 54	20%	54%
	55 and over	23%	54%
Home Ownership	Renters	16%	58%
	Owners	18%	59%
Household Income	Low (less than $50k)	14%	65%
	Medium ($50k -<$100k)	19%	61%
	High (more than $100k)	21%	56%
Currently receiving rebate or concession (electricity or gas)	Yes	19%	62%
	No	18%	57%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	12%	74%
	No	19%	56%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	18%	64%
	No	18%	58%
Employment	Working FT / PT / Casual	18%	61%
	Retired	21%	53%
	Other	16%	57%
Solar Panels	Yes	15%	65%
	No	19%	57%
Switched Energy Company or Plan	In the past 12 months	16%	64%
	1 to 5 years ago	20%	54%
	NETT switched (last 5 yrs)	18%	59%
	Have not switched at all	N/A	N/A
Approached by Energy Company	Yes	18%	63%
	No	18%	57%
Actively Investigated Offers	Yes	16%	66%
	No	20%	53%
Electricity Spend (last quarterly bill)	Low (Less than $300)	13%	62%
	Medium ($300 - $399)	21%	57%
	High (more than $400)	18%	61%
Gas Spend (last quarterly bill)	Low (Less than $200)	16%	61%
	Medium ($200-$299)	24%	55%
	High (more than $300)	8%	76%

Base: Respondents who switched their electricity company or plan (n=861)
Q51. The last time you switched your electricity company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

Satisfaction with Switching

Ease of comparing offers when changing gas company or plan (NEM)	Sub-group	NETT Difficult to switch	NETT Easy to switch
Total	All residents	15%	67%
Location	Metro	16%	67%
	Regional	14%	70%
Gas	Mains connected	15%	67%
	Not connected		N/A
Age Group	18 – 34	1%	92%
	35 – 54	19%	61%
	55 and over	22%	55%
Home Ownership	Renters	13%	75%
	Owners	16%	65%
Household Income	Low (less than $50k)	14%	71%
	Medium ($50k -<$100k)	23%	64%
	High (more than $100k)	9%	73%
Currently receiving rebate or concession (electricity or gas)	Yes	15%	70%
	No	16%	66%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	5%	87%
	No	19%	62%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	15%	73%
	No	16%	65%
Employment	Working FT / PT / Casual	16%	70%
	Retired	18%	57%
	Other	11%	67%
Solar Panels	Yes	9%	80%
	No	18%	62%
Switched Energy Company or Plan	In the past 12 months	9%	72%
	1 to 5 years ago	25%	61%
	NETT switched (last 5 yrs)	15%	67%
	Have not switched at all		N/A
Approached by Energy Company	Yes	13%	74%
	No	17%	60%
Actively Investigated Offers	Yes	10%	77%
	No	20%	59%
Electricity Spend (last quarterly bill)	Low (Less than $300)	12%	69%
	Medium ($300 - $399)	25%	62%
	High (more than $400)	10%	75%
Gas Spend (last quarterly bill)	Low (Less than $200)	16%	64%
	Medium ($200-$299)	23%	54%
	High (more than $300)	6%	88%

Base: Respondents who switched their gas company or plan (n=307)
Q56. The last time you switched your gas company or plan, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?

Barriers to Investigating Offers or Switching

Reasons for investigating different offers and options but not changing energy company or plan in the last 12 months (NEM)	Total	Has Solar	No Solar
(n=)	189	61	128
TOTAL: Price related reason	**42%**	**30%**	**47%**
My company/plan had a better discount/cheaper price	19%	15%	20%
The saving wasn't worth the effort	11%	2%	15%
Too confusing	9%	5%	11%
No particular reason	8%	11%	6%
They are all the same / it would make no difference to the price I pay	7%	11%	6%
No other options / alternatives available	7%	5%	8%
TOTAL: Time/Effort related reason	**7%**	**2%**	**9%**
My existing company matched the offer / gave me a better offer so I stayed with them	5%	2%	7%
I am on a contract	5%	0%	7%
Too much hassle / couldn't be bothered / too lazy	4%	2%	4%
I don't trust what the energy companies say	3%	2%	4%
Too busy / I don't have time	3%	0%	4%
Lack of information on best deals available	3%	0%	4%
Happy with current retailer	1%	1%	1%
Happy with current arrangements	1%	1%	1%
Did not want to lose my solar bonus/feed-in tariff	1%	5%	0%
Have solar arrangements	1%	2%	0%
I feel pressured by energy companies	0%	1%	0%
The company I looked into didn't offer gas / wanted to have electricity and gas with the same company	0%	1%	0%
Other	5%	4%	5%
Not answered	16%	39%	6%

Base: Respondents who investigated offers and options but haven't switched in the past 12 months
Q32. And what was the main reason why you investigated different offers and options but haven't changed your energy company or plan in the last 12 months? Any others?

Reasons for not investigating different options nor changing energy company or plan in the last 12 months (NEM)	Total	Has Solar	No Solar
(n=)	939	172	767
TOTAL: Satisfied with current situation	**27%**	**29%**	**27%**
Happy with current retailer	23%	25%	23%
No particular reason	21%	21%	21%
TOTAL: Time / Effort Related Reasons	**21%**	**18%**	**21%**
TOTAL: Value proposition reasons	**13%**	**6%**	**14%**
Too much hassle / couldn't be bothered / too lazy	12%	13%	12%
Too busy / I don't have time	10%	9%	10%
They're all the same / makes no difference to the price I pay	8%	3%	9%
No other options / alternatives available	7%	5%	7%
Happy with current arrangements	6%	8%	6%
Too confusing	5%	4%	5%
I don't trust what the energy companies say	3%	3%	3%
I am on a contract	2%	2%	2%
My company/plan had a better discount/cheaper price	2%	1%	2%
Have solar arrangements	2%	12%	0%
The new company would eventually increase their prices anyway	2%	0%	2%
Lack of information on best deals available	2%	0%	2%
The saving wasn't worth the effort	1%	1%	1%
Not my decision e.g. tenant, retirement village	1%	2%	1%
Do not want to lose my solar bonus/feed in tariff	1%	4%	0%
I don't want to enter into a contract	1%	0%	1%
I wouldn't know where to get credible information	1%	0%	1%
Couldn't get an offer because I have solar	0%	3%	0%
My bill is too low to bother	0%	1%	0%
Existing company matched offer / gave better offer so I stayed	0%	1%	0%
Didn't know you could change company or plan /Other	3%	2%	3%
Don't know	2%	2%	2%
Not answered	1%	1%	1%

Base: Respondents who had not investigated offers and options or switched in the past 12 months
Q33. Are there any reasons you haven't investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?

Switching Intentions and Attitudes

Interest in Looking for a Better Deal (NEM)	Sub-group	Interested / Currently Looking	Not Interested in Switching
Total	All residents	50%	32%
Location	Metro	52%	32%
	Regional	45%	32%
Gas	Mains connected	56%	28%
	Not connected	44%	37%
Age Group	18 – 34	56%	32%
	35 – 54	52%	29%
	55 and over	41%	38%
Home Ownership	Renters	46%	35%
	Owners	52%	31%
Household Income	Low (less than $50k)	39%	39%
	Medium ($50k -<$100k)	55%	30%
	High (more than $100k)	60%	27%
Currently receiving rebate or concession (electricity or gas)	Yes	48%	34%
	No	51%	32%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	62%	25%
	No	48%	34%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	67%	19%
	No	46%	35%
Employment	Working FT / PT / Casual	56%	29%
	Retired	40%	41%
	Other	42%	34%
Solar Panels	Yes	55%	28%
	No	49%	34%
Switched Energy Company or Plan	In the past 12 months	52%	15%
	1 to 5 years ago	56%	31%
	NETT switched (last 5 yrs)	54%	24%
	Have not switched at all	46%	41%
Approached by Energy Company	Yes	54%	30%
	No	47%	34%
Actively Investigated Offers	Yes	62%	16%
	No	45%	40%
Electricity Spend (last quarterly bill)	Low (Less than $300)	44%	38%
	Medium ($300 - $399)	50%	35%
	High (more than $400)	58%	25%
Gas Spend (last quarterly bill)	Low (Less than $200)	50%	30%
	Medium ($200-$299)	52%	31%
	High (more than $300)	72%	19%

Base: All Respondents (n=2,008)
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size) (NEM)	Residential
	NEM (n=2,008)
Total	**$207**
Last Quarterly Electricity Bill: Less than $300	$178
Last Quarterly Electricity Bill: $300-$500	$210
Last Quarterly Electricity Bill: $500 or more	$247

Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Business
	NEM (n=500)
Total	**$609**
Last Quarterly Electricity Bill: Less than $500	$257
Last Quarterly Electricity Bill: $500-$999	$462
Last Quarterly Electricity Bill: $1,000 or more	$1,117

Base: All Respondents
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Residential
	NEM (n=908)
Total	**$162**
Last Quarterly Gas Bill: Less than $100	120
Last Quarterly Gas Bill: $100 - $300	$163
Last Quarterly Gas Bill: $300 or more	$169

Base: Respondents with mains connected gas
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	Business
	NEM (n=101)
Total	**$249**
Last Quarterly Gas Bill: Less than $160	$194
Last Quarterly Gas Bill: $160-$349	$204
Last Quarterly Gas Bill: more than $350	$382

Base: Respondents with mains connected gas
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan?

I'd switch if I was not satisfied with my current company (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	79%	4%
Location	Metro	81%	4%
	Regional	76%	4%
Gas	Mains connected	81%	4%
	Not connected	78%	3%
Age Group	18 – 34	80%	2%
	35 – 54	78%	4%
	55 and over	80%	5%
Home Ownership	Renters	81%	2%
	Owners	79%	5%
Household Income	Low (less than $50k)	80%	3%
	Medium ($50k -<$100k)	79%	4%
	High (more than $100k)	84%	4%
Currently receiving rebate or concession (electricity or gas)	Yes	81%	3%
	No	78%	4%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	79%	4%
	No	79%	4%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	78%	5%
	No	79%	4%
Employment	Working FT / PT / Casual	80%	3%
	Retired	80%	5%
	Other	76%	5%
Solar Panels	Yes	81%	4%
	No	79%	4%
Switched Energy Company or Plan	In the past 12 months	85%	4%
	1 to 5 years ago	85%	3%
	NETT switched (last 5 yrs)	85%	3%
	Have not switched at all	73%	4%
Approached by Energy Company	Yes	85%	4%
	No	74%	4%
Actively Investigated Offers	Yes	86%	4%
	No	77%	4%
Electricity Spend (last quarterly bill)	Low (Less than $300)	82%	3%
	Medium ($300 - $399)	83%	3%
	High (more than $400)	78%	5%
Gas Spend (last quarterly bill)	Low (Less than $200)	85%	4%
	Medium ($200-$299)	79%	3%
	High (more than $300)	83%	6%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'm concerned if I switch there might be hidden fees and charges (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	67%	12%
Location	Metro	68%	11%
	Regional	63%	15%
Gas	Mains connected	68%	14%
	Not connected	66%	11%
Age Group	18 – 34	67%	10%
	35 – 54	68%	12%
	55 and over	65%	15%
Home Ownership	Renters	68%	10%
	Owners	67%	13%
Household Income	Low (less than $50k)	69%	11%
	Medium ($50k -<$100k)	70%	9%
	High (more than $100k)	64%	19%
Currently receiving rebate or concession (electricity or gas)	Yes	71%	11%
	No	65%	13%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	75%	10%
	No	65%	13%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	79%	6%
	No	64%	14%
Employment	Working FT / PT / Casual	67%	12%
	Retired	67%	15%
	Other	68%	10%
Solar Panels	Yes	68%	14%
	No	67%	12%
Switched Energy Company or Plan	In the past 12 months	65%	16%
	1 to 5 years ago	66%	16%
	NETT switched (last 5 yrs)	65%	16%
	Have not switched at all	68%	9%
Approached by Energy Company	Yes	71%	13%
	No	64%	13%
Actively Investigated Offers	Yes	67%	19%
	No	68%	9%
Electricity Spend (last quarterly bill)	Low (Less than $300)	67%	11%
	Medium ($300 - $399)	68%	14%
	High (more than $400)	71%	12%
Gas Spend (last quarterly bill)	Low (Less than $200)	70%	15%
	Medium ($200-$299)	64%	15%
	High (more than $300)	77%	11%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I generally don't trust energy companies that promise a better deal (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	54%	16%
Location	Metro	57%	14%
	Regional	48%	20%
Gas	Mains connected	57%	17%
	Not connected	53%	15%
Age Group	18 – 34	51%	16%
	35 – 54	54%	16%
	55 and over	58%	16%
Home Ownership	Renters	53%	15%
	Owners	55%	16%
Household Income	Low (less than $50k)	54%	16%
	Medium ($50k -<$100k)	55%	15%
	High (more than $100k)	56%	19%
Currently receiving rebate or concession (electricity or gas)	Yes	58%	15%
	No	53%	16%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	67%	10%
	No	52%	17%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	67%	10%
	No	52%	17%
Employment	Working FT / PT / Casual	55%	15%
	Retired	57%	17%
	Other	50%	15%
Solar Panels	Yes	60%	16%
	No	53%	16%
Switched Energy Company or Plan	In the past 12 months	54%	21%
	1 to 5 years ago	54%	18%
	NETT switched (last 5 yrs)	54%	19%
	Have not switched at all	55%	12%
Approached by Energy Company	Yes	62%	16%
	No	49%	17%
Actively Investigated Offers	Yes	56%	22%
	No	55%	13%
Electricity Spend (last quarterly bill)	Low (Less than $300)	51%	17%
	Medium ($300 - $399)	55%	18%
	High (more than $400)	62%	15%
Gas Spend (last quarterly bill)	Low (Less than $200)	58%	19%
	Medium ($200-$299)	52%	19%
	High (more than $300)	71%	13%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

It's too complicated to try and compare the various options and offers available (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	53%	24%
Location	Metro	56%	22%
	Regional	47%	28%
Gas	Mains connected	57%	23%
	Not connected	51%	25%
Age Group	18 – 34	52%	20%
	35 – 54	52%	26%
	55 and over	57%	23%
Home Ownership	Renters	49%	22%
	Owners	55%	24%
Household Income	Low (less than $50k)	47%	27%
	Medium ($50k -<$100k)	61%	20%
	High (more than $100k)	50%	27%
Currently receiving rebate or concession (electricity or gas)	Yes	56%	24%
	No	52%	24%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	61%	19%
	No	52%	24%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	66%	15%
	No	50%	26%
Employment	Working FT / PT / Casual	54%	23%
	Retired	58%	24%
	Other	46%	25%
Solar Panels	Yes	58%	23%
	No	52%	24%
Switched Energy Company or Plan	In the past 12 months	50%	32%
	1 to 5 years ago	49%	28%
	NETT switched (last 5 yrs)	49%	30%
	Have not switched at all	57%	17%
Approached by Energy Company	Yes	57%	25%
	No	50%	25%
Actively Investigated Offers	Yes	49%	34%
	No	56%	19%
Electricity Spend (last quarterly bill)	Low (Less than $300)	51%	27%
	Medium ($300 - $399)	54%	22%
	High (more than $400)	58%	22%
Gas Spend (last quarterly bill)	Low (Less than $200)	58%	24%
	Medium ($200-$299)	53%	22%
	High (more than $300)	65%	20%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'd prefer to try and save energy to reduce my bill than to seek out a better deal (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	50%	20%
Location	Metro	51%	19%
	Regional	47%	23%
Gas	Mains connected	51%	21%
	Not connected	50%	20%
Age Group	18 – 34	56%	18%
	35 – 54	48%	20%
	55 and over	49%	24%
Home Ownership	Renters	46%	19%
	Owners	53%	21%
Household Income	Low (less than $50k)	51%	20%
	Medium ($50k -<$100k)	51%	20%
	High (more than $100k)	50%	24%
Currently receiving rebate or concession (electricity or gas)	Yes	53%	20%
	No	49%	20%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	62%	15%
	No	48%	21%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	54%	17%
	No	49%	21%
Employment	Working FT / PT / Casual	52%	20%
	Retired	51%	22%
	Other	44%	19%
Solar Panels	Yes	56%	22%
	No	49%	20%
Switched Energy Company or Plan	In the past 12 months	49%	27%
	1 to 5 years ago	47%	25%
	NETT switched (last 5 yrs)	48%	26%
	Have not switched at all	53%	14%
Approached by Energy Company	Yes	55%	22%
	No	46%	20%
Actively Investigated Offers	Yes	50%	26%
	No	51%	18%
Electricity Spend (last quarterly bill)	Low (Less than $300)	51%	20%
	Medium ($300 - $399)	51%	21%
	High (more than $400)	53%	21%
Gas Spend (last quarterly bill)	Low (Less than $200)	51%	21%
	Medium ($200-$299)	47%	27%
	High (more than $300)	63%	16%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I can't be bothered looking for a better deal (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	41%	33%
Location	Metro	44%	32%
	Regional	33%	36%
Gas	Mains connected	44%	31%
	Not connected	37%	35%
Age Group	18 – 34	49%	26%
	35 – 54	38%	36%
	55 and over	37%	36%
Home Ownership	Renters	38%	33%
	Owners	42%	34%
Household Income	Low (less than $50k)	38%	33%
	Medium ($50k -<$100k)	43%	32%
	High (more than $100k)	44%	34%
Currently receiving rebate or concession (electricity or gas)	Yes	41%	32%
	No	40%	34%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%	29%
	No	39%	34%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	49%	26%
	No	39%	35%
Employment	Working FT / PT / Casual	43%	32%
	Retired	37%	37%
	Other	35%	32%
Solar Panels	Yes	44%	31%
	No	40%	34%
Switched Energy Company or Plan	In the past 12 months	38%	45%
	1 to 5 years ago	37%	37%
	NETT switched (last 5 yrs)	37%	41%
	Have not switched at all	44%	25%
Approached by Energy Company	Yes	45%	34%
	No	37%	34%
Actively Investigated Offers	Yes	33%	50%
	No	45%	26%
Electricity Spend (last quarterly bill)	Low (Less than $300)	38%	34%
	Medium ($300 - $399)	42%	37%
	High (more than $400)	45%	32%
Gas Spend (last quarterly bill)	Low (Less than $200)	47%	31%
	Medium ($200-$299)	40%	34%
	High (more than $300)	52%	29%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

The amount I could save is not worth the time and effort (NEM)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	41%	31%
Location	Metro	44%	29%
	Regional	33%	35%
Gas	Mains connected	45%	31%
	Not connected	38%	31%
Age Group	18 – 34	42%	29%
	35 – 54	39%	32%
	55 and over	44%	30%
Home Ownership	Renters	35%	30%
	Owners	44%	31%
Household Income	Low (less than $50k)	39%	31%
	Medium ($50k -<$100k)	43%	30%
	High (more than $100k)	43%	34%
Currently receiving rebate or concession (electricity or gas)	Yes	45%	28%
	No	39%	32%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%	28%
	No	40%	31%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	46%	28%
	No	40%	31%
Employment	Working FT / PT / Casual	41%	31%
	Retired	48%	28%
	Other	35%	31%
Solar Panels	Yes	48%	27%
	No	39%	32%
Switched Energy Company or Plan	In the past 12 months	37%	43%
	1 to 5 years ago	33%	39%
	NETT switched (last 5 yrs)	35%	41%
	Have not switched at all	47%	20%
Approached by Energy Company	Yes	46%	33%
	No	38%	30%
Actively Investigated Offers	Yes	40%	43%
	No	43%	26%
Electricity Spend (last quarterly bill)	Low (Less than $300)	39%	35%
	Medium ($300 - $399)	44%	31%
	High (more than $400)	44%	29%
Gas Spend (last quarterly bill)	Low (Less than $200)	43%	35%
	Medium ($200-$299)	46%	31%
	High (more than $300)	56%	28%

Base: All Respondents (n=2,008)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (NEM)	Sub-group	Residents 2015
Total	All residents	56%
Location	Metro	59%
	Regional	52%
Gas	Mains connected	64%
	Not connected	49%
Age Group	18 – 34	70%
	35 – 54	50%
	55 and over	55%
Home Ownership	Renters	56%
	Owners	57%
Household Income	Low (less than $50k)	55%
	Medium ($50k -<$100k)	59%
	High (more than $100k)	58%
Currently receiving rebate or concession (electricity or gas)	Yes	59%
	No	55%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	67%
	No	55%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	53%
	No	57%
Employment	Working FT / PT / Casual	58%
	Retired	52%
	Other	57%
Solar Panels	Yes	62%
	No	55%
Switched Energy Company or Plan	In the past 12 months	65%
	1 to 5 years ago	55%
	NETT switched (last 5 yrs)	59%
	Have not switched at all	53%
Approached by Energy Company	Yes	60%
	No	55%
Actively Investigated Offers	Yes	60%
	No	55%
Electricity Spend (last quarterly bill)	Low (Less than $300)	62%
	Medium ($300 - $399)	59%
	High (more than $400)	53%
Gas Spend (last quarterly bill)	Low (Less than $200)	70%
	Medium ($200-$299)	55%
	High (more than $300)	68%

Base: All Respondents (n=2,008)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Electricity Companies

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (NEM)	Sub-group	Residents 2015
Total	All residents	69%
Location	Metro	70%
	Regional	67%
Gas	Mains connected	73%
	Not connected	66%
Age Group	18 – 34	75%
	35 – 54	65%
	55 and over	69%
Home Ownership	Renters	66%
	Owners	70%
Household Income	Low (less than $50k)	71%
	Medium ($50k -<$100k)	69%
	High (more than $100k)	72%
Currently receiving rebate or concession (electricity or gas)	Yes	73%
	No	67%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	75%
	No	68%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	63%
	No	70%
Employment	Working FT / PT / Casual	68%
	Retired	70%
	Other	69%
Solar Panels	Yes	75%
	No	67%
Switched Energy Company or Plan	In the past 12 months	74%
	1 to 5 years ago	65%
	NETT switched (last 5 yrs)	69%
	Have not switched at all	68%
Approached by Energy Company	Yes	72%
	No	68%
Actively Investigated Offers	Yes	70%
	No	69%
Electricity Spend (last quarterly bill)	Low (Less than $300)	77%
	Medium ($300 - $399)	68%
	High (more than $400)	65%
Gas Spend (last quarterly bill)	Low (Less than $200)	75%
	Medium ($200-$299)	75%
	High (more than $300)	74%

Base: All Respondents (n=2,008)
Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (NEM)	Sub-group	Residents 2015
Total	All residents	65%
Location	Metro	65%
	Regional	64%
Gas	Mains connected	70%
	Not connected	61%
Age Group	18 – 34	71%
	35 – 54	59%
	55 and over	70%
Home Ownership	Renters	61%
	Owners	67%
Household Income	Low (less than $50k)	68%
	Medium ($50k -<$100k)	65%
	High (more than $100k)	67%
Currently receiving rebate or concession (electricity or gas)	Yes	70%
	No	62%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	75%
	No	63%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	61%
	No	66%
Employment	Working FT / PT / Casual	64%
	Retired	70%
	Other	62%
Solar Panels	Yes	69%
	No	64%
Switched Energy Company or Plan	In the past 12 months	72%
	1 to 5 years ago	60%
	NETT switched (last 5 yrs)	65%
	Have not switched at all	64%
Approached by Energy Company	Yes	68%
	No	64%
Actively Investigated Offers	Yes	67%
	No	64%
Electricity Spend (last quarterly bill)	Low (Less than $300)	71%
	Medium ($300 - $399)	67%
	High (more than $400)	62%
Gas Spend (last quarterly bill)	Low (Less than $200)	71%
	Medium ($200-$299)	68%
	High (more than $300)	75%

Base: All Respondents (n=2,008)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (NEM)	Sub-group	Residents 2015
Total	All residents	54%
Location	Metro	55%
	Regional	53%
Gas	Mains connected	62%
	Not connected	48%
Age Group	18 – 34	65%
	35 – 54	48%
	55 and over	54%
Home Ownership	Renters	50%
	Owners	56%
Household Income	Low (less than $50k)	54%
	Medium ($50k -<$100k)	55%
	High (more than $100k)	58%
Currently receiving rebate or concession (electricity or gas)	Yes	59%
	No	52%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	63%
	No	52%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	45%
	No	56%
Employment	Working FT / PT / Casual	55%
	Retired	55%
	Other	50%
Solar Panels	Yes	63%
	No	52%
Switched Energy Company or Plan	In the past 12 months	63%
	1 to 5 years ago	49%
	NETT switched (last 5 yrs)	55%
	Have not switched at all	53%
Approached by Energy Company	Yes	58%
	No	52%
Actively Investigated Offers	Yes	58%
	No	53%
Electricity Spend (last quarterly bill)	Low (Less than $300)	63%
	Medium ($300 - $399)	57%
	High (more than $400)	47%
Gas Spend (last quarterly bill)	Low (Less than $200)	59%
	Medium ($200-$299)	64%
	High (more than $300)	67%

Base: All Respondents (n=2,008)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Satisfaction with Gas Companies

Satisfaction with Current Gas Company (% Somewhat / Very Satisfied) (NEM)	Sub-group	Residents 2015
Total	All residents	72%
Location	Metro	72%
	Regional	75%
Gas	Mains connected	72%
	Not connected	N/A
Age Group	18 – 34	79%
	35 – 54	69%
	55 and over	70%
Home Ownership	Renters	66%
	Owners	75%
Household Income	Low (less than $50k)	77%
	Medium ($50k -<$100k)	72%
	High (more than $100k)	77%
Currently receiving rebate or concession (electricity or gas)	Yes	78%
	No	70%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	82%
	No	70%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	71%
	No	73%
Employment	Working FT / PT / Casual	74%
	Retired	70%
	Other	69%
Solar Panels	Yes	82%
	No	69%
Switched Energy Company or Plan	In the past 12 months	77%
	1 to 5 years ago	68%
	NETT switched (last 5 yrs)	73%
	Have not switched at all	72%
Approached by Energy Company	Yes	76%
	No	70%
Actively Investigated Offers	Yes	76%
	No	71%
Electricity Spend (last quarterly bill)	Low (Less than $300)	78%
	Medium ($300 - $399)	71%
	High (more than $400)	73%
Gas Spend (last quarterly bill)	Low (Less than $200)	76%
	Medium ($200-$299)	74%
	High (more than $300)	73%

Base: All Respondents with mains connected gas (n=908)
Q7. And how satisfied are you with your current gas company?

Rating of Overall Quality of Customer Service Provided by Gas Company (% Rating 7-10) (NEM)	Sub-group	Residents 2015
Total	All residents	69%
Location	Metro	68%
	Regional	71%
Gas	Mains connected	69%
	Not connected	N/A
Age Group	18 – 34	74%
	35 – 54	64%
	55 and over	70%
Home Ownership	Renters	61%
	Owners	72%
Household Income	Low (less than $50k)	70%
	Medium ($50k -<$100k)	68%
	High (more than $100k)	73%
Currently receiving rebate or concession (electricity or gas)	Yes	77%
	No	65%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	83%
	No	65%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	70%
	No	68%
Employment	Working FT / PT / Casual	70%
	Retired	70%
	Other	62%
Solar Panels	Yes	80%
	No	65%
Switched Energy Company or Plan	In the past 12 months	75%
	1 to 5 years ago	60%
	NETT switched (last 5 yrs)	68%
	Have not switched at all	69%
Approached by Energy Company	Yes	72%
	No	67%
Actively Investigated Offers	Yes	71%
	No	68%
Electricity Spend (last quarterly bill)	Low (Less than $300)	71%
	Medium ($300 - $399)	64%
	High (more than $400)	72%
Gas Spend (last quarterly bill)	Low (Less than $200)	70%
	Medium ($200-$299)	67%
	High (more than $300)	71%

Base: All Respondents with mains connected gas (n=908)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Gas Company (% Rating 7-10) (NEM)	Sub-group	Residents 2015
Total	All residents	61%
Location	Metro	61%
	Regional	61%
Gas	Mains connected	61%
	Not connected	N/A
Age Group	18 – 34	73%
	35 – 54	54%
	55 and over	59%
Home Ownership	Renters	50%
	Owners	65%
Household Income	Low (less than $50k)	61%
	Medium ($50k -<$100k)	59%
	High (more than $100k)	72%
Currently receiving rebate or concession (electricity or gas)	Yes	70%
	No	56%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	77%
	No	57%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	62%
	No	61%
Employment	Working FT / PT / Casual	64%
	Retired	60%
	Other	49%
Solar Panels	Yes	73%
	No	57%
Switched Energy Company or Plan	In the past 12 months	67%
	1 to 5 years ago	54%
	NETT switched (last 5 yrs)	61%
	Have not switched at all	61%
Approached by Energy Company	Yes	64%
	No	59%
Actively Investigated Offers	Yes	66%
	No	58%
Electricity Spend (last quarterly bill)	Low (Less than $300)	64%
	Medium ($300 - $399)	57%
	High (more than $400)	65%
Gas Spend (last quarterly bill)	Low (Less than $200)	59%
	Medium ($200-$299)	64%
	High (more than $300)	66%

Base: All Respondents with mains connected gas (n=908)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (Victoria) (% Rating 7-10) (NEM)	Sub-group	Residents 2015
Total	All residents	54%
Location	Metro	55%
	Regional	52%
Gas	Mains connected	58%
	Not connected	50%
Age Group	18 – 34	68%
	35 – 54	49%
	55 and over	48%
Home Ownership	Renters	55%
	Owners	54%
Household Income	Low (less than $50k)	50%
	Medium ($50k -<$100k)	55%
	High (more than $100k)	60%
Currently receiving rebate or concession (electricity or gas)	Yes	53%
	No	54%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	61%
	No	53%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	49%
	No	55%
Employment	Working FT / PT / Casual	57%
	Retired	46%
	Other	53%
Solar Panels	Yes	61%
	No	52%
Switched Energy Company or Plan	In the past 12 months	64%
	1 to 5 years ago	50%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	51%
Approached by Energy Company	Yes	60%
	No	50%
Actively Investigated Offers	Yes	68%
	No	48%
Electricity Spend (last quarterly bill)	Low (Less than $300)	55%
	Medium ($300 - $399)	61%
	High (more than $400)	51%
Gas Spend (last quarterly bill)	Low (Less than $200)	55%
	Medium ($200-$299)	60%
	High (more than $300)	65%

Base: All Respondents (n=2,008)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Appendix Four: Victoria Sub-group Tables

Customer Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% True) (VIC)	Sub-group	Residents 2015
Total	All residents	96%
Location	Metro	96%
	Regional	96%
Gas	Mains connected	97%
	Not connected	98%
Age Group	18 – 34	92%
	35 – 54	97%
	55 and over	98%
Home Ownership	Renters	94%
	Owners	97%
Household Income	Low (less than $50k)	96%
	Medium ($50k -<$100k)	97%
	High (more than $100k)	94%
Currently receiving rebate or concession (electricity or gas)	Yes	98%
	No	95%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	98%
	No	96%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	98%
	No	96%
Employment	Working FT / PT / Casual	95%
	Retired	99%
	Other	94%
Solar Panels	Yes	97%
	No	96%
Switched Energy Company or Plan	In the past 12 months	99%
	1 to 5 years ago	97%
	NETT switched (last 5 yrs)	98%
	Have not switched at all	93%
Approached by Energy Company	Yes	98%
	No	96%
Actively Investigated Offers	Yes	98%
	No	95%
Electricity Spend (last quarterly bill)	Low (Less than $300)	97%
	Medium ($300 - $399)	99%
	High (more than $400)	94%
Gas Spend (last quarterly bill)	Low (Less than $200)	99%
	Medium ($200-$299)	99%
	High (more than $300)	92%

Base: All Respondents (n=403)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose Gas Company (% True) (VIC)	Sub-group	Residents 2015
Total	All residents	96%
Location	Metro	96%
	Regional	96%
Gas	Mains connected	96%
	Not connected	N/A
Age Group	18 – 34	95%
	35 – 54	96%
	55 and over	97%
Home Ownership	Renters	95%
	Owners	96%
Household Income	Low (less than $50k)	93%
	Medium ($50k -<$100k)	98%
	High (more than $100k)	97%
Currently receiving rebate or concession (electricity or gas)	Yes	97%
	No	95%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	98%
	No	95%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	96%
	No	96%
Employment	Working FT / PT / Casual	97%
	Retired	96%
	Other	92%
Solar Panels	Yes	96%
	No	96%
Switched Energy Company or Plan	In the past 12 months	99%
	1 to 5 years ago	97%
	NETT switched (last 5 yrs)	98%
	Have not switched at all	93%
Approached by Energy Company	Yes	96%
	No	97%
Actively Investigated Offers	Yes	95%
	No	97%
Electricity Spend (last quarterly bill)	Low (Less than $300)	96%
	Medium ($300 - $399)	100%
	High (more than $400)	94%
Gas Spend (last quarterly bill)	Low (Less than $200)	97%
	Medium ($200-$299)	97%
	High (more than $300)	95%

Base: Respondents with mains connected gas (n=329)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company.

Awareness of Being Able to Choose from Different Energy Plans (% True) (VIC)	Sub-group	Electricity 2015	Gas 2015
Total	All residents	87%	83%
Location	Metro	88%	83%
	Regional	83%	83%
Gas	Mains connected	88%	83%
	Not connected	84%	N/A
Age Group	18 – 34	84%	88%
	35 – 54	86%	79%
	55 and over	89%	83%
Home Ownership	Renters	87%	85%
	Owners	86%	82%
Household Income	Low (less than $50k)	80%	79%
	Medium ($50k -<$100k)	92%	89%
	High (more than $100k)	89%	83%
Currently receiving rebate or concession (electricity or gas)	Yes	84%	76%
	No	88%	86%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	87%	72%
	No	86%	85%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	80%	75%
	No	88%	84%
Employment	Working FT / PT / Casual	87%	81%
	Retired	88%	81%
	Other	85%	92%
Solar Panels	Yes	87%	74%
	No	87%	84%
Switched Energy Company or Plan	In the past 12 months	89%	81%
	1 to 5 years ago	85%	86%
	NETT switched (last 5 yrs)	87%	83%
	Have not switched at all	86%	81%
Approached by Energy Company	Yes	89%	82%
	No	84%	81%
Actively Investigated Offers	Yes	90%	82%
	No	85%	83%
Electricity Spend (last quarterly bill)	Low (Less than $300)	88%	84%
	Medium ($300 - $399)	92%	84%
	High (more than $400)	84%	81%
Gas Spend (last quarterly bill)	Low (Less than $200)	93%	89%
	Medium ($200-$299)	80%	81%
	High (more than $300)	84%	71%

Base: All Respondents (n=403) / Base: Respondents with mains connected gas (n=329)
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms / d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (VIC)	Sub-group	Residents 2015
Total	All residents	61%
Location	Metro	61%
	Regional	61%
Gas	Mains connected	60%
	Not connected	67%
Age Group	18 – 34	69%
	35 – 54	56%
	55 and over	61%
Home Ownership	Renters	62%
	Owners	61%
Household Income	Low (less than $50k)	61%
	Medium ($50k -<$100k)	61%
	High (more than $100k)	64%
Currently receiving rebate or concession (electricity or gas)	Yes	64%
	No	59%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	74%
	No	59%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	49%
	No	64%
Employment	Working FT / PT / Casual	60%
	Retired	61%
	Other	64%
Solar Panels	Yes	74%
	No	59%
Switched Energy Company or Plan	In the past 12 months	64%
	1 to 5 years ago	57%
	NETT switched (last 5 yrs)	60%
	Have not switched at all	62%
Approached by Energy Company	Yes	63%
	No	60%
Actively Investigated Offers	Yes	68%
	No	58%
Electricity Spend (last quarterly bill)	Low (Less than $300)	59%
	Medium ($300 - $399)	68%
	High (more than $400)	57%
Gas Spend (last quarterly bill)	Low (Less than $200)	59%
	Medium ($200-$299)	67%
	High (more than $300)	57%

Base: All Respondents (n=403)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

Market Participation

Incidence of Switching or Investigating Offers

Switched Energy Company or Plan (% Yes) (VIC)	Sub-group	Past 5 Years	Past 12 Months	Not Switched
Total	All residents	57%	29%	43%
Location	Metro	55%	28%	45%
	Regional	65%	33%	35%
Gas	Mains connected	58%	30%	42%
	Not connected	60%	29%	40%
Age Group	18 – 34	49%	32%	51%
	35 – 54	60%	29%	40%
	55 and over	62%	28%	38%
Home Ownership	Renters	56%	28%	44%
	Owners	58%	30%	42%
Household Income	Low (less than $50k)	65%	35%	35%
	Medium ($50k -<$100k)	50%	29%	50%
	High (more than $100k)	57%	24%	43%
Currently receiving rebate or concession (electricity or gas)	Yes	60%	33%	40%
	No	56%	27%	44%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	60%	41%	40%
	No	57%	27%	43%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	72%	43%	28%
	No	55%	27%	45%
Employment	Working FT / PT / Casual	55%	26%	45%
	Retired	58%	30%	42%
	Other	63%	39%	37%
Solar Panels	Yes	70%	39%	30%
	No	55%	28%	45%
Approached by Energy Company	Yes	69%	41%	31%
	No	47%	18%	53%
Actively Investigated Offers	Yes	76%	50%	24%
	No	49%	18%	51%
Electricity Spend (last quarterly bill)	Low (Less than $300)	62%	32%	38%
	Medium ($300 - $399)	60%	31%	40%
	High (more than $400)	56%	27%	44%
Gas Spend (last quarterly bill)	Low (Less than $200)	63%	29%	37%
	Medium ($200-$299)	54%	27%	46%
	High (more than $300)	56%	37%	44%

Base: All Respondents (n=403)
Q17. A) In the past 5 years, how many times have you changed the following?
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Approached by an Energy Company in Past 12 Months (% Yes) (VIC)	Sub-group	Residents 2015
Total	All residents	53%
Location	Metro	54%
	Regional	50%
Gas	Mains connected	55%
	Not connected	49%
Age Group	18 – 34	39%
	35 – 54	56%
	55 and over	61%
Home Ownership	Renters	52%
	Owners	54%
Household Income	Low (less than $50k)	54%
	Medium ($50k -<$100k)	57%
	High (more than $100k)	54%
Currently receiving rebate or concession (electricity or gas)	Yes	56%
	No	51%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	73%
	No	49%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	56%
	No	52%
Employment	Working FT / PT / Casual	52%
	Retired	59%
	Other	49%
Solar Panels	Yes	62%
	No	51%
Switched Energy Company or Plan	In the past 12 months	73%
	1 to 5 years ago	54%
	NETT switched (last 5 yrs)	64%
	Have not switched at all	38%
Approached by Energy Company	Yes	100%
	No	N/A
Actively Investigated Offers	Yes	67%
	No	46%
Electricity Spend (last quarterly bill)	Low (Less than $300)	54%
	Medium ($300 - $399)	55%
	High (more than $400)	55%
Gas Spend (last quarterly bill)	Low (Less than $200)	61%
	Medium ($200-$299)	45%
	High (more than $300)	58%

Base: All Respondents (n=403)
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Actively Investigated Offers or Options (% Yes) (VIC)	Sub-group	Residents 2015
Total	All residents	36%
Location	Metro	37%
	Regional	34%
Gas	Mains connected	38%
	Not connected	32%
Age Group	18 – 34	36%
	35 – 54	37%
	55 and over	36%
Home Ownership	Renters	33%
	Owners	38%
Household Income	Low (less than $50k)	34%
	Medium ($50k -<$100k)	33%
	High (more than $100k)	47%
Currently receiving rebate or concession (electricity or gas)	Yes	37%
	No	36%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	47%
	No	34%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	49%
	No	34%
Employment	Working FT / PT / Casual	37%
	Retired	34%
	Other	37%
Solar Panels	Yes	50%
	No	34%
Switched Energy Company or Plan	In the past 12 months	61%
	1 to 5 years ago	34%
	NETT switched (last 5 yrs)	48%
	Have not switched at all	21%
Approached by Energy Company	Yes	46%
	No	27%
Actively Investigated Offers	Yes	100%
	No	N/A
Electricity Spend (last quarterly bill)	Low (Less than $300)	37%
	Medium ($300 - $399)	37%
	High (more than $400)	40%
Gas Spend (last quarterly bill)	Low (Less than $200)	39%
	Medium ($200-$299)	33%
	High (more than $300)	52%

Base: All Respondents (n=403)
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Satisfaction with Switching

Interest in Looking for a Better Deal (VIC)	Sub-group	Interested / Currently Looking	Not Interested in Switching
Total	All residents	51%	30%
Location	Metro	53%	28%
	Regional	45%	34%
Gas	Mains connected	53%	28%
	Not connected	41%	36%
Age Group	18 – 34	60%	29%
	35 – 54	56%	22%
	55 and over	37%	40%
Home Ownership	Renters	46%	35%
	Owners	53%	27%
Household Income	Low (less than $50k)	41%	38%
	Medium ($50k -<$100k)	60%	25%
	High (more than $100k)	56%	25%
Currently receiving rebate or concession (electricity or gas)	Yes	42%	38%
	No	56%	25%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	56%	29%
	No	50%	30%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	65%	16%
	No	48%	32%
Employment	Working FT / PT / Casual	57%	25%
	Retired	37%	43%
	Other	50%	29%
Solar Panels	Yes	62%	21%
	No	49%	32%
Switched Energy Company or Plan	In the past 12 months	48%	18%
	1 to 5 years ago	54%	31%
	NETT switched (last 5 yrs)	51%	24%
	Have not switched at all	51%	37%
Approached by Energy Company	Yes	55%	25%
	No	47%	37%
Actively Investigated Offers	Yes	61%	16%
	No	46%	38%
Electricity Spend (last quarterly bill)	Low (Less than $300)	45%	34%
	Medium ($300 - $399)	52%	29%
	High (more than $400)	56%	24%
Gas Spend (last quarterly bill)	Low (Less than $200)	52%	30%
	Medium ($200-$299)	45%	33%
	High (more than $300)	72%	15%

Base: All Respondents (n=403)
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

I'd switch if I was not satisfied with my current company (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	80%	4%
Location	Metro	83%	3%
	Regional	72%	4%
Gas	Mains connected	82%	4%
	Not connected	78%	3%
Age Group	18 – 34	83%	2%
	35 – 54	77%	2%
	55 and over	82%	6%
Home Ownership	Renters	79%	1%
	Owners	81%	5%
Household Income	Low (less than $50k)	82%	3%
	Medium ($50k -<$100k)	78%	3%
	High (more than $100k)	83%	5%
Currently receiving rebate or concession (electricity or gas)	Yes	81%	1%
	No	80%	5%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	85%	3%
	No	79%	4%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	81%	4%
	No	80%	4%
Employment	Working FT / PT / Casual	79%	3%
	Retired	81%	6%
	Other	82%	3%
Solar Panels	Yes	81%	4%
	No	80%	3%
Switched Energy Company or Plan	In the past 12 months	82%	5%
	1 to 5 years ago	90%	3%
	NETT switched (last 5 yrs)	86%	4%
	Have not switched at all	72%	3%
Approached by Energy Company	Yes	86%	4%
	No	72%	4%
Actively Investigated Offers	Yes	88%	4%
	No	77%	3%
Electricity Spend (last quarterly bill)	Low (Less than $300)	83%	3%
	Medium ($300 - $399)	79%	2%
	High (more than $400)	77%	5%
Gas Spend (last quarterly bill)	Low (Less than $200)	84%	4%
	Medium ($200-$299)	78%	4%
	High (more than $300)	86%	1%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'm concerned if I switch there might be hidden fees and charges (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	65%	15%
Location	Metro	68%	13%
	Regional	55%	22%
Gas	Mains connected	65%	16%
	Not connected	64%	12%
Age Group	18 – 34	61%	12%
	35 – 54	67%	15%
	55 and over	65%	18%
Home Ownership	Renters	63%	8%
	Owners	66%	18%
Household Income	Low (less than $50k)	68%	10%
	Medium ($50k -<$100k)	64%	13%
	High (more than $100k)	60%	25%
Currently receiving rebate or concession (electricity or gas)	Yes	70%	10%
	No	62%	18%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	73%	14%
	No	63%	15%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	79%	8%
	No	62%	17%
Employment	Working FT / PT / Casual	64%	17%
	Retired	71%	13%
	Other	61%	13%
Solar Panels	Yes	65%	21%
	No	65%	14%
Switched Energy Company or Plan	In the past 12 months	62%	19%
	1 to 5 years ago	65%	19%
	NETT switched (last 5 yrs)	63%	19%
	Have not switched at all	66%	10%
Approached by Energy Company	Yes	68%	18%
	No	60%	13%
Actively Investigated Offers	Yes	67%	20%
	No	64%	12%
Electricity Spend (last quarterly bill)	Low (Less than $300)	66%	13%
	Medium ($300 - $399)	58%	19%
	High (more than $400)	69%	16%
Gas Spend (last quarterly bill)	Low (Less than $200)	67%	19%
	Medium ($200-$299)	57%	18%
	High (more than $300)	75%	8%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I generally don't trust energy companies that promise a better deal (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	59%	16%
Location	Metro	63%	14%
	Regional	46%	22%
Gas	Mains connected	58%	18%
	Not connected	65%	6%
Age Group	18 – 34	55%	13%
	35 – 54	58%	17%
	55 and over	63%	16%
Home Ownership	Renters	53%	10%
	Owners	61%	18%
Household Income	Low (less than $50k)	56%	13%
	Medium ($50k -<$100k)	63%	17%
	High (more than $100k)	61%	18%
Currently receiving rebate or concession (electricity or gas)	Yes	61%	12%
	No	58%	18%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%	8%
	No	58%	17%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	71%	9%
	No	56%	17%
Employment	Working FT / PT / Casual	60%	15%
	Retired	63%	16%
	Other	50%	16%
Solar Panels	Yes	61%	16%
	No	58%	16%
Switched Energy Company or Plan	In the past 12 months	54%	21%
	1 to 5 years ago	61%	17%
	NETT switched (last 5 yrs)	58%	19%
	Have not switched at all	61%	11%
Approached by Energy Company	Yes	63%	16%
	No	56%	16%
Actively Investigated Offers	Yes	57%	23%
	No	62%	12%
Electricity Spend (last quarterly bill)	Low (Less than $300)	56%	14%
	Medium ($300 - $399)	56%	19%
	High (more than $400)	67%	18%
Gas Spend (last quarterly bill)	Low (Less than $200)	61%	21%
	Medium ($200-$299)	54%	18%
	High (more than $300)	69%	13%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

It's too complicated to try and compare the various options and offers available (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	55%	24%
Location	Metro	57%	22%
	Regional	46%	28%
Gas	Mains connected	56%	24%
	Not connected	55%	23%
Age Group	18 – 34	50%	21%
	35 – 54	51%	25%
	55 and over	63%	24%
Home Ownership	Renters	39%	22%
	Owners	61%	25%
Household Income	Low (less than $50k)	48%	25%
	Medium ($50k -<$100k)	64%	20%
	High (more than $100k)	51%	29%
Currently receiving rebate or concession (electricity or gas)	Yes	59%	19%
	No	52%	26%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	59%	21%
	No	54%	24%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	67%	14%
	No	52%	26%
Employment	Working FT / PT / Casual	55%	24%
	Retired	69%	18%
	Other	35%	29%
Solar Panels	Yes	61%	21%
	No	53%	24%
Switched Energy Company or Plan	In the past 12 months	50%	34%
	1 to 5 years ago	51%	27%
	NETT switched (last 5 yrs)	51%	31%
	Have not switched at all	60%	14%
Approached by Energy Company	Yes	58%	26%
	No	51%	24%
Actively Investigated Offers	Yes	48%	36%
	No	58%	17%
Electricity Spend (last quarterly bill)	Low (Less than $300)	54%	24%
	Medium ($300 - $399)	52%	24%
	High (more than $400)	58%	24%
Gas Spend (last quarterly bill)	Low (Less than $200)	55%	26%
	Medium ($200-$299)	55%	23%
	High (more than $300)	67%	21%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'd prefer to try and save energy to reduce my bill than to seek out a better deal (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	51%	20%
Location	Metro	53%	19%
	Regional	45%	24%
Gas	Mains connected	51%	20%
	Not connected	57%	21%
Age Group	18 – 34	55%	14%
	35 – 54	45%	23%
	55 and over	56%	21%
Home Ownership	Renters	41%	25%
	Owners	56%	18%
Household Income	Low (less than $50k)	56%	22%
	Medium ($50k -<$100k)	48%	19%
	High (more than $100k)	52%	19%
Currently receiving rebate or concession (electricity or gas)	Yes	58%	21%
	No	48%	20%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	68%	21%
	No	48%	20%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	62%	18%
	No	49%	21%
Employment	Working FT / PT / Casual	48%	21%
	Retired	64%	16%
	Other	46%	21%
Solar Panels	Yes	62%	17%
	No	49%	21%
Switched Energy Company or Plan	In the past 12 months	52%	23%
	1 to 5 years ago	50%	28%
	NETT switched (last 5 yrs)	51%	25%
	Have not switched at all	52%	13%
Approached by Energy Company	Yes	53%	22%
	No	51%	18%
Actively Investigated Offers	Yes	54%	24%
	No	50%	18%
Electricity Spend (last quarterly bill)	Low (Less than $300)	52%	20%
	Medium ($300 - $399)	52%	20%
	High (more than $400)	56%	20%
Gas Spend (last quarterly bill)	Low (Less than $200)	50%	21%
	Medium ($200-$299)	53%	21%
	High (more than $300)	62%	15%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I can't be bothered looking for a better deal (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	44%	34%
Location	Metro	47%	34%
	Regional	35%	37%
Gas	Mains connected	44%	34%
	Not connected	44%	37%
Age Group	18 – 34	50%	26%
	35 – 54	41%	36%
	55 and over	43%	39%
Home Ownership	Renters	37%	35%
	Owners	47%	34%
Household Income	Low (less than $50k)	40%	36%
	Medium ($50k -<$100k)	51%	31%
	High (more than $100k)	45%	35%
Currently receiving rebate or concession (electricity or gas)	Yes	48%	34%
	No	42%	35%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	48%	36%
	No	43%	34%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	52%	25%
	No	42%	36%
Employment	Working FT / PT / Casual	47%	31%
	Retired	43%	39%
	Other	34%	41%
Solar Panels	Yes	47%	26%
	No	43%	36%
Switched Energy Company or Plan	In the past 12 months	35%	43%
	1 to 5 years ago	44%	38%
	NETT switched (last 5 yrs)	39%	41%
	Have not switched at all	50%	26%
Approached by Energy Company	Yes	42%	36%
	No	47%	36%
Actively Investigated Offers	Yes	34%	46%
	No	51%	28%
Electricity Spend (last quarterly bill)	Low (Less than $300)	41%	34%
	Medium ($300 - $399)	40%	37%
	High (more than $400)	52%	34%
Gas Spend (last quarterly bill)	Low (Less than $200)	45%	36%
	Medium ($200-$299)	46%	33%
	High (more than $300)	43%	35%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

The amount I could save is not worth the time and effort (VIC)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	43%	30%
Location	Metro	45%	30%
	Regional	36%	31%
Gas	Mains connected	43%	32%
	Not connected	44%	24%
Age Group	18 – 34	42%	27%
	35 – 54	41%	31%
	55 and over	46%	32%
Home Ownership	Renters	32%	33%
	Owners	47%	29%
Household Income	Low (less than $50k)	43%	34%
	Medium ($50k -<$100k)	48%	26%
	High (more than $100k)	41%	32%
Currently receiving rebate or concession (electricity or gas)	Yes	45%	30%
	No	42%	30%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	48%	34%
	No	42%	30%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	47%	32%
	No	42%	30%
Employment	Working FT / PT / Casual	43%	28%
	Retired	54%	26%
	Other	30%	41%
Solar Panels	Yes	41%	24%
	No	43%	31%
Switched Energy Company or Plan	In the past 12 months	35%	46%
	1 to 5 years ago	42%	33%
	NETT switched (last 5 yrs)	38%	39%
	Have not switched at all	49%	18%
Approached by Energy Company	Yes	45%	34%
	No	38%	29%
Actively Investigated Offers	Yes	40%	43%
	No	45%	23%
Electricity Spend (last quarterly bill)	Low (Less than $300)	40%	36%
	Medium ($300 - $399)	40%	32%
	High (more than $400)	51%	23%
Gas Spend (last quarterly bill)	Low (Less than $200)	42%	36%
	Medium ($200-$299)	44%	27%
	High (more than $300)	52%	31%

Base: All Respondents (n=403)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (VIC)	Sub-group	Residents 2015
Total	All residents	63%
Location	Metro	65%
	Regional	58%
Gas	Mains connected	64%
	Not connected	55%
Age Group	18 – 34	77%
	35 – 54	53%
	55 and over	64%
Home Ownership	Renters	64%
	Owners	63%
Household Income	Low (less than $50k)	66%
	Medium ($50k -<$100k)	62%
	High (more than $100k)	66%
Currently receiving rebate or concession (electricity or gas)	Yes	64%
	No	63%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	70%
	No	62%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	63%
	No	63%
Employment	Working FT / PT / Casual	63%
	Retired	59%
	Other	70%
Solar Panels	Yes	72%
	No	61%
Switched Energy Company or Plan	In the past 12 months	67%
	1 to 5 years ago	57%
	NETT switched (last 5 yrs)	62%
	Have not switched at all	64%
Approached by Energy Company	Yes	62%
	No	65%
Actively Investigated Offers	Yes	69%
	No	59%
Electricity Spend (last quarterly bill)	Low (Less than $300)	68%
	Medium ($300 - $399)	70%
	High (more than $400)	53%
Gas Spend (last quarterly bill)	Low (Less than $200)	71%
	Medium ($200-$299)	61%
	High (more than $300)	61%

Base: All Respondents (n=403)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Electricity Companies

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (VIC)	Sub-group	Residents 2015
Total	All residents	67%
Location	Metro	68%
	Regional	65%
Gas	Mains connected	69%
	Not connected	59%
Age Group	18 – 34	77%
	35 – 54	61%
	55 and over	67%
Home Ownership	Renters	66%
	Owners	68%
Household Income	Low (less than $50k)	66%
	Medium ($50k -<$100k)	68%
	High (more than $100k)	74%
Currently receiving rebate or concession (electricity or gas)	Yes	63%
	No	69%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	70%
	No	67%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	65%
	No	68%
Employment	Working FT / PT / Casual	67%
	Retired	64%
	Other	72%
Solar Panels	Yes	76%
	No	65%
Switched Energy Company or Plan	In the past 12 months	67%
	1 to 5 years ago	63%
	NETT switched (last 5 yrs)	65%
	Have not switched at all	70%
Approached by Energy Company	Yes	66%
	No	69%
Actively Investigated Offers	Yes	69%
	No	66%
Electricity Spend (last quarterly bill)	Low (Less than $300)	76%
	Medium ($300 - $399)	60%
	High (more than $400)	63%
Gas Spend (last quarterly bill)	Low (Less than $200)	70%
	Medium ($200-$299)	70%
	High (more than $300)	72%

Base: All Respondents (n=403)
Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (VIC)	Sub-group	Residents 2015
Total	All residents	67%
Location	Metro	68%
	Regional	66%
Gas	Mains connected	67%
	Not connected	66%
Age Group	18 – 34	71%
	35 – 54	59%
	55 and over	74%
Home Ownership	Renters	63%
	Owners	69%
Household Income	Low (less than $50k)	72%
	Medium ($50k -<$100k)	66%
	High (more than $100k)	69%
Currently receiving rebate or concession (electricity or gas)	Yes	71%
	No	65%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	76%
	No	65%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	67%
	No	67%
Employment	Working FT / PT / Casual	63%
	Retired	72%
	Other	73%
Solar Panels	Yes	82%
	No	64%
Switched Energy Company or Plan	In the past 12 months	69%
	1 to 5 years ago	63%
	NETT switched (last 5 yrs)	66%
	Have not switched at all	69%
Approached by Energy Company	Yes	69%
	No	69%
Actively Investigated Offers	Yes	67%
	No	67%
Electricity Spend (last quarterly bill)	Low (Less than $300)	72%
	Medium ($300 - $399)	66%
	High (more than $400)	61%
Gas Spend (last quarterly bill)	Low (Less than $200)	72%
	Medium ($200-$299)	63%
	High (more than $300)	67%

Base: All Respondents (n=403)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (VIC)	Sub-group	Residents 2015
Total	All residents	57%
Location	Metro	59%
	Regional	52%
Gas	Mains connected	60%
	Not connected	48%
Age Group	18 – 34	69%
	35 – 54	48%
	55 and over	59%
Home Ownership	Renters	55%
	Owners	58%
Household Income	Low (less than $50k)	59%
	Medium ($50k -<$100k)	58%
	High (more than $100k)	61%
Currently receiving rebate or concession (electricity or gas)	Yes	59%
	No	56%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	66%
	No	56%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	47%
	No	59%
Employment	Working FT / PT / Casual	56%
	Retired	59%
	Other	60%
Solar Panels	Yes	75%
	No	54%
Switched Energy Company or Plan	In the past 12 months	63%
	1 to 5 years ago	52%
	NETT switched (last 5 yrs)	58%
	Have not switched at all	57%
Approached by Energy Company	Yes	60%
	No	53%
Actively Investigated Offers	Yes	60%
	No	56%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%
	Medium ($300 - $399)	55%
	High (more than $400)	49%
Gas Spend (last quarterly bill)	Low (Less than $200)	59%
	Medium ($200-$299)	62%
	High (more than $300)	62%

Base: All Respondents (n=403)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Satisfaction with Gas Companies

Satisfaction with Current Gas Company (% Somewhat / Very Satisfied) (VIC)	Sub-group	Residents 2015
Total	All residents	70%
Location	Metro	68%
	Regional	77%
Gas	Mains connected	70%
	Not connected	N/A
Age Group	18 – 34	77%
	35 – 54	67%
	55 and over	68%
Home Ownership	Renters	66%
	Owners	72%
Household Income	Low (less than $50k)	76%
	Medium ($50k -<$100k)	68%
	High (more than $100k)	74%
Currently receiving rebate or concession (electricity or gas)	Yes	72%
	No	69%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	77%
	No	69%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	62%
	No	72%
Employment	Working FT / PT / Casual	74%
	Retired	65%
	Other	61%
Solar Panels	Yes	82%
	No	67%
Switched Energy Company or Plan	In the past 12 months	70%
	1 to 5 years ago	68%
	NETT switched (last 5 yrs)	69%
	Have not switched at all	72%
Approached by Energy Company	Yes	72%
	No	69%
Actively Investigated Offers	Yes	73%
	No	68%
Electricity Spend (last quarterly bill)	Low (Less than $300)	74%
	Medium ($300 - $399)	69%
	High (more than $400)	70%
Gas Spend (last quarterly bill)	Low (Less than $200)	75%
	Medium ($200-$299)	73%
	High (more than $300)	65%

Base: All Respondents with mains connected gas (n=329)
Q7. And how satisfied are you with your current gas company?

Rating of Overall Quality of Customer Service Provided by Gas Company (% Rating 7-10) (VIC)	Sub-group	Residents 2015
Total	All residents	66%
Location	Metro	66%
	Regional	68%
Gas	Mains connected	66%
	Not connected	N/A
Age Group	18 – 34	69%
	35 – 54	61%
	55 and over	70%
Home Ownership	Renters	61%
	Owners	68%
Household Income	Low (less than $50k)	69%
	Medium ($50k -<$100k)	65%
	High (more than $100k)	72%
Currently receiving rebate or concession (electricity or gas)	Yes	73%
	No	63%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	79%
	No	64%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	63%
	No	67%
Employment	Working FT / PT / Casual	67%
	Retired	68%
	Other	60%
Solar Panels	Yes	85%
	No	62%
Switched Energy Company or Plan	In the past 12 months	70%
	1 to 5 years ago	59%
	NETT switched (last 5 yrs)	65%
	Have not switched at all	68%
Approached by Energy Company	Yes	70%
	No	65%
Actively Investigated Offers	Yes	68%
	No	65%
Electricity Spend (last quarterly bill)	Low (Less than $300)	67%
	Medium ($300 - $399)	67%
	High (more than $400)	65%
Gas Spend (last quarterly bill)	Low (Less than $200)	71%
	Medium ($200-$299)	63%
	High (more than $300)	65%

Base: All Respondents with mains connected gas (n=329)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Gas Company (% Rating 7-10) (VIC)	Sub-group	Residents 2015
Total	All residents	61%
Location	Metro	62%
	Regional	59%
Gas	Mains connected	61%
	Not connected	N/A
Age Group	18 – 34	71%
	35 – 54	54%
	55 and over	63%
Home Ownership	Renters	55%
	Owners	63%
Household Income	Low (less than $50k)	64%
	Medium ($50k -<$100k)	58%
	High (more than $100k)	71%
Currently receiving rebate or concession (electricity or gas)	Yes	68%
	No	58%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	75%
	No	58%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	54%
	No	63%
Employment	Working FT / PT / Casual	63%
	Retired	61%
	Other	53%
Solar Panels	Yes	82%
	No	57%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	58%
	NETT switched (last 5 yrs)	62%
	Have not switched at all	60%
Approached by Energy Company	Yes	63%
	No	60%
Actively Investigated Offers	Yes	64%
	No	59%
Electricity Spend (last quarterly bill)	Low (Less than $300)	64%
	Medium ($300 - $399)	61%
	High (more than $400)	61%
Gas Spend (last quarterly bill)	Low (Less than $200)	62%
	Medium ($200-$299)	66%
	High (more than $300)	60%

Base: All Respondents with mains connected gas (n=329)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (Victoria) (% Rating 7-10) (VIC)	Sub-group	Residents 2015
Total	All residents	58%
Location	Metro	58%
	Regional	56%
Gas	Mains connected	57%
	Not connected	61%
Age Group	18 – 34	73%
	35 – 54	52%
	55 and over	52%
Home Ownership	Renters	58%
	Owners	58%
Household Income	Low (less than $50k)	56%
	Medium ($50k -<$100k)	58%
	High (more than $100k)	63%
Currently receiving rebate or concession (electricity or gas)	Yes	55%
	No	59%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	62%
	No	57%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	55%
	No	58%
Employment	Working FT / PT / Casual	57%
	Retired	50%
	Other	69%
Solar Panels	Yes	70%
	No	55%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	48%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	58%
Approached by Energy Company	Yes	58%
	No	57%
Actively Investigated Offers	Yes	69%
	No	51%
Electricity Spend (last quarterly bill)	Low (Less than $300)	59%
	Medium ($300 - $399)	69%
	High (more than $400)	47%
Gas Spend (last quarterly bill)	Low (Less than $200)	57%
	Medium ($200-$299)	59%
	High (more than $300)	59%

Base: All Respondents (n=403)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Appendix Five: South Australia Sub-group Tables

Customer Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% True) (SA)	Sub-group	Residents 2015
Total	All residents	93%
Location	Metro	93%
	Regional	92%
Gas	Mains connected	95%
	Not connected	92%
Age Group	18 – 34	84%
	35 – 54	96%
	55 and over	97%
Home Ownership	Renters	94%
	Owners	93%
Household Income	Low (less than $50k)	94%
	Medium ($50k -<$100k)	96%
	High (more than $100k)	90%
Currently receiving rebate or concession (electricity or gas)	Yes	93%
	No	93%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	85%
	No	95%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	88%
	No	94%
Employment	Working FT / PT / Casual	93%
	Retired	97%
	Other	91%
Solar Panels	Yes	94%
	No	93%
Switched Energy Company or Plan	In the past 12 months	98%
	1 to 5 years ago	97%
	NETT switched (last 5 yrs)	98%
	Have not switched at all	89%
Approached by Energy Company	Yes	95%
	No	94%
Actively Investigated Offers	Yes	94%
	No	93%
Electricity Spend (last quarterly bill)	Low (Less than $300)	95%
	Medium ($300 - $399)	97%
	High (more than $400)	91%
Gas Spend (last quarterly bill)	Low (Less than $200)	95%
	Medium ($200-$299)	100%
	High (more than $300)	89%

Base: All Respondents (n=401)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose Gas Company (% True) (SA)	Sub-group	Residents 2015
Total	All residents	90%
Gas	Mains connected	90%
	Not connected	N/A
Age Group	18 – 34	86%
	35 – 54	91%
	55 and over	93%
Home Ownership	Renters	90%
	Owners	90%
Household Income	Low (less than $50k)	86%
	Medium ($50k -<$100k)	94%
	High (more than $100k)	90%
Currently receiving rebate or concession (electricity or gas)	Yes	85%
	No	94%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	80%
	No	93%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	85%
	No	92%
Employment	Working FT / PT / Casual	93%
	Retired	90%
	Other	87%
Solar Panels	Yes	89%
	No	91%
Switched Energy Company or Plan	In the past 12 months	90%
	1 to 5 years ago	93%
	NETT switched (last 5 yrs)	91%
	Have not switched at all	89%
Approached by Energy Company	Yes	91%
	No	90%
Actively Investigated Offers	Yes	88%
	No	92%
Electricity Spend (last quarterly bill)	Low (Less than $300)	91%
	Medium ($300 - $399)	91%
	High (more than $400)	87%
Gas Spend (last quarterly bill)	Low (Less than $200)	88%
	Medium ($200-$299)	95%
	High (more than $300)	86%

Base: Respondents with mains connected gas (n=202)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company

Awareness of Being Able to Choose from Different Energy Plans (% True) (SA)	Sub-group	Electricity 2015	Gas 2015
Total	All residents	81%	76%
Location	Metro	82%	Base size too small
	Regional	79%	
Gas	Mains connected	82%	76%
	Not connected	82%	N/A
Age Group	18 – 34	79%	80%
	35 – 54	80%	73%
	55 and over	87%	80%
Home Ownership	Renters	81%	68%
	Owners	81%	79%
Household Income	Low (less than $50k)	75%	70%
	Medium ($50k -<$100k)	85%	77%
	High (more than $100k)	89%	87%
Currently receiving rebate or concession (electricity or gas)	Yes	79%	75%
	No	82%	77%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	74%	69%
	No	83%	78%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	79%	73%
	No	82%	77%
Employment	Working FT / PT / Casual	85%	84%
	Retired	85%	75%
	Other	68%	61%
Solar Panels	Yes	83%	78%
	No	81%	75%
Switched Energy Company or Plan	In the past 12 months	94%	90%
	1 to 5 years ago	83%	75%
	NETT switched (last 5 yrs)	88%	82%
	Have not switched at all	75%	70%
Approached by Energy Company	Yes	87%	78%
	No	79%	77%
Actively Investigated Offers	Yes	88%	89%
	No	80%	72%
Electricity Spend (last quarterly bill)	Low (Less than $300)	82%	78%
	Medium ($300 - $399)	89%	81%
	High (more than $400)	81%	78%
Gas Spend (last quarterly bill)	Low (Less than $200)	81%	67%
	Medium ($200-$299)	90%	86%
	High (more than $300)	79%	81%

Base: All Respondents (n=401) / Base: Respondents with mains connected gas (n=202)
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms / d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (SA)	Sub-group	Residents 2015
Total	All residents	57%
Location	Metro	60%
	Regional	47%
Gas	Mains connected	62%
	Not connected	53%
Age Group	18 – 34	72%
	35 – 54	50%
	55 and over	57%
Home Ownership	Renters	56%
	Owners	58%
Household Income	Low (less than $50k)	53%
	Medium ($50k -<$100k)	59%
	High (more than $100k)	65%
Currently receiving rebate or concession (electricity or gas)	Yes	61%
	No	55%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	60%
	No	57%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	48%
	No	59%
Employment	Working FT / PT / Casual	59%
	Retired	64%
	Other	49%
Solar Panels	Yes	61%
	No	55%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	51%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	57%
Approached by Energy Company	Yes	59%
	No	57%
Actively Investigated Offers	Yes	61%
	No	56%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%
	Medium ($300 - $399)	67%
	High (more than $400)	48%
Gas Spend (last quarterly bill)	Low (Less than $200)	66%
	Medium ($200-$299)	62%
	High (more than $300)	63%

Base: All Respondents (n=401)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

Market Participation

Incidence of Switching or Investigating Offers

Switched Energy Company or Plan (% Yes) (SA)	Sub-group	Past 5 Years	Past 12 Months	Not Switched
Total	All residents	49%	19%	51%
Location	Metro	50%	20%	50%
	Regional	45%	17%	55%
Gas	Mains connected	51%	25%	49%
	Not connected	47%	13%	53%
Age Group	18 – 34	39%	21%	61%
	35 – 54	51%	20%	49%
	55 and over	54%	14%	46%
Home Ownership	Renters	49%	24%	51%
	Owners	50%	17%	50%
Household Income	Low (less than $50k)	48%	19%	52%
	Medium ($50k -<$100k)	57%	23%	43%
	High (more than $100k)	40%	16%	60%
Currently receiving rebate or concession (electricity or gas)	Yes	54%	20%	46%
	No	46%	18%	54%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	46%	32%	54%
	No	49%	17%	51%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	46%	29%	54%
	No	50%	17%	50%
Employment	Working FT / PT / Casual	50%	22%	50%
	Retired	47%	9%	53%
	Other	47%	20%	53%
Solar Panels	Yes	52%	21%	48%
	No	47%	18%	53%
Approached by Energy Company	Yes	57%	23%	43%
	No	45%	17%	55%
Actively Investigated Offers	Yes	70%	42%	30%
	No	42%	11%	58%
Electricity Spend (last quarterly bill)	Low (Less than $300)	56%	20%	44%
	Medium ($300 - $399)	46%	23%	54%
	High (more than $400)	45%	19%	55%
Gas Spend (last quarterly bill)	Low (Less than $200)	48%	22%	52%
	Medium ($200-$299)	61%	28%	39%
	High (more than $300)	45%	29%	55%

Base: All Respondents (n=401)
Q17. A) In the past 5 years, how many times have you changed the following?
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Approached by an Energy Company in Past 12 Months (% Yes) (SA)	Sub-group	Residents 2015
Total	All residents	41%
Location	Metro	45%
	Regional	28%
Gas	Mains connected	47%
	Not connected	35%
Age Group	18 – 34	36%
	35 – 54	41%
	55 and over	46%
Home Ownership	Renters	45%
	Owners	39%
Household Income	Low (less than $50k)	36%
	Medium ($50k -<$100k)	43%
	High (more than $100k)	48%
Currently receiving rebate or concession (electricity or gas)	Yes	45%
	No	39%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	57%
	No	38%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	50%
	No	39%
Employment	Working FT / PT / Casual	42%
	Retired	42%
	Other	38%
Solar Panels	Yes	50%
	No	37%
Switched Energy Company or Plan	In the past 12 months	49%
	1 to 5 years ago	46%
	NETT switched (last 5 yrs)	47%
	Have not switched at all	35%
Approached by Energy Company	Yes	100%
	No	N/A
Actively Investigated Offers	Yes	56%
	No	36%
Electricity Spend (last quarterly bill)	Low (Less than $300)	35%
	Medium ($300 - $399)	43%
	High (more than $400)	46%
Gas Spend (last quarterly bill)	Low (Less than $200)	48%
	Medium ($200-$299)	35%
	High (more than $300)	62%

Base: All Respondents (n=402)
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Actively Investigated Offers or Options (% Yes) (SA)	Sub-group	Residents 2015
Total	All residents	25%
Location	Metro	26%
	Regional	25%
Gas	Mains connected	28%
	Not connected	23%
Age Group	18 – 34	25%
	35 – 54	27%
	55 and over	23%
Home Ownership	Renters	23%
	Owners	26%
Household Income	Low (less than $50k)	24%
	Medium ($50k -<$100k)	28%
	High (more than $100k)	25%
Currently receiving rebate or concession (electricity or gas)	Yes	33%
	No	21%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	35%
	No	23%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	39%
	No	22%
Employment	Working FT / PT / Casual	27%
	Retired	22%
	Other	22%
Solar Panels	Yes	34%
	No	22%
Switched Energy Company or Plan	In the past 12 months	56%
	1 to 5 years ago	23%
	NETT switched (last 5 yrs)	36%
	Have not switched at all	15%
Approached by Energy Company	Yes	35%
	No	20%
Electricity Spend (last quarterly bill)	Low (Less than $300)	25%
	Medium ($300 - $399)	25%
	High (more than $400)	27%
Gas Spend (last quarterly bill)	Low (Less than $200)	21%
	Medium ($200-$299)	23%
	High (more than $300)	43%

Base: All Respondents (n=401)
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Switching Intentions and Attitudes

Interest in Looking for a Better Deal (SA)	Sub-group	Interested / Currently Looking	Not Interested in Switching
Total	All residents	39%	41%
Location	Metro	40%	41%
	Regional	33%	41%
Gas	Mains connected	40%	39%
	Not connected	37%	43%
Age Group	18 – 34	43%	41%
	35 – 54	38%	41%
	55 and over	37%	41%
Home Ownership	Renters	28%	46%
	Owners	44%	38%
Household Income	Low (less than $50k)	27%	46%
	Medium ($50k -<$100k)	44%	35%
	High (more than $100k)	52%	42%
Currently receiving rebate or concession (electricity or gas)	Yes	32%	42%
	No	42%	41%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	40%	33%
	No	38%	43%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	52%	27%
	No	35%	44%
Employment	Working FT / PT / Casual	45%	39%
	Retired	30%	46%
	Other	29%	42%
Solar Panels	Yes	45%	37%
	No	36%	43%
Switched Energy Company or Plan	In the past 12 months	36%	22%
	1 to 5 years ago	48%	37%
	NETT switched (last 5 yrs)	43%	31%
	Have not switched at all	35%	51%
Approached by Energy Company	Yes	46%	39%
	No	34%	43%
Actively Investigated Offers	Yes	55%	14%
	No	33%	51%
Electricity Spend (last quarterly bill)	Low (Less than $300)	32%	43%
	Medium ($300 - $399)	40%	42%
	High (more than $400)	46%	39%
Gas Spend (last quarterly bill)	Low (Less than $200)	30%	39%
	Medium ($200-$299)	38%	50%
	High (more than $300)	52%	33%

Base: All Respondents (n=401)
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

I'd switch if I was not satisfied with my current company (SA)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	78%	4%
Location	Metro	78%	4%
	Regional	76%	2%
Gas	Mains connected	83%	5%
	Not connected	75%	2%
Age Group	18 – 34	77%	1%
	35 – 54	76%	6%
	55 and over	82%	1%
Home Ownership	Renters	77%	3%
	Owners	78%	4%
Household Income	Low (less than $50k)	76%	5%
	Medium ($50k -<$100k)	79%	4%
	High (more than $100k)	82%	3%
Currently receiving rebate or concession (electricity or gas)	Yes	81%	3%
	No	76%	4%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	72%	2%
	No	79%	4%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	77%	5%
	No	78%	3%
Employment	Working FT / PT / Casual	81%	3%
	Retired	79%	5%
	Other	69%	5%
Solar Panels	Yes	85%	2%
	No	75%	4%
Switched Energy Company or Plan	In the past 12 months	91%	0%
	1 to 5 years ago	80%	3%
	NETT switched (last 5 yrs)	85%	2%
	Have not switched at all	72%	5%
Approached by Energy Company	Yes	86%	2%
	No	74%	5%
Actively Investigated Offers	Yes	95%	0%
	No	72%	5%
Electricity Spend (last quarterly bill)	Low (Less than $300)	80%	4%
	Medium ($300 - $399)	86%	3%
	High (more than $400)	78%	4%
Gas Spend (last quarterly bill)	Low (Less than $200)	81%	7%
	Medium ($200-$299)	82%	5%
	High (more than $300)	83%	5%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'm concerned if I switch there might be hidden fees and charges (SA)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	71%	7%
Location	Metro	72%	6%
	Regional	68%	10%
Gas	Mains connected	74%	6%
	Not connected	69%	8%
Age Group	18 – 34	72%	4%
	35 – 54	71%	7%
	55 and over	70%	10%
Home Ownership	Renters	69%	5%
	Owners	72%	8%
Household Income	Low (less than $50k)	71%	6%
	Medium ($50k -<$100k)	74%	5%
	High (more than $100k)	68%	11%
Currently receiving rebate or concession (electricity or gas)	Yes	73%	7%
	No	70%	7%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	69%	4%
	No	72%	7%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	81%	3%
	No	69%	8%
Employment	Working FT / PT / Casual	70%	7%
	Retired	71%	12%
	Other	75%	3%
Solar Panels	Yes	72%	9%
	No	71%	6%
Switched Energy Company or Plan	In the past 12 months	71%	7%
	1 to 5 years ago	62%	10%
	NETT switched (last 5 yrs)	66%	9%
	Have not switched at all	76%	5%
Approached by Energy Company	Yes	74%	6%
	No	70%	8%
Actively Investigated Offers	Yes	74%	8%
	No	71%	7%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%	4%
	Medium ($300 - $399)	70%	9%
	High (more than $400)	78%	9%
Gas Spend (last quarterly bill)	Low (Less than $200)	73%	6%
	Medium ($200-$299)	65%	7%
	High (more than $300)	82%	6%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

It's too complicated to try and compare the various options and offers available (SA)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	55%	21%
Location	Metro	56%	19%
	Regional	50%	28%
Gas	Mains connected	55%	21%
	Not connected	54%	21%
Age Group	18 – 34	53%	16%
	35 – 54	52%	23%
	55 and over	62%	21%
Home Ownership	Renters	52%	20%
	Owners	55%	21%
Household Income	Low (less than $50k)	49%	21%
	Medium ($50k -<$100k)	57%	19%
	High (more than $100k)	61%	23%
Currently receiving rebate or concession (electricity or gas)	Yes	57%	21%
	No	54%	21%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%	21%
	No	56%	21%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	54%	15%
	No	55%	22%
Employment	Working FT / PT / Casual	57%	20%
	Retired	63%	21%
	Other	44%	23%
Solar Panels	Yes	57%	26%
	No	54%	19%
Switched Energy Company or Plan	In the past 12 months	46%	33%
	1 to 5 years ago	48%	26%
	NETT switched (last 5 yrs)	48%	29%
	Have not switched at all	61%	13%
Approached by Energy Company	Yes	61%	20%
	No	51%	22%
Actively Investigated Offers	Yes	50%	33%
	No	57%	17%
Electricity Spend (last quarterly bill)	Low (Less than $300)	48%	25%
	Medium ($300 - $399)	56%	22%
	High (more than $400)	64%	16%
Gas Spend (last quarterly bill)	Low (Less than $200)	52%	21%
	Medium ($200-$299)	51%	21%
	High (more than $300)	66%	18%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I generally don't trust energy companies that promise a better deal (SA)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	59%	10%
Location	Metro	60%	9%
	Regional	52%	14%
Gas	Mains connected	60%	10%
	Not connected	58%	10%
Age Group	18 – 34	63%	9%
	35 – 54	54%	11%
	55 and over	64%	9%
Home Ownership	Renters	60%	11%
	Owners	59%	10%
Household Income	Low (less than $50k)	57%	10%
	Medium ($50k -<$100k)	61%	10%
	High (more than $100k)	65%	9%
Currently receiving rebate or concession (electricity or gas)	Yes	61%	11%
	No	57%	9%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	60%	7%
	No	58%	11%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	65%	6%
	No	57%	11%
Employment	Working FT / PT / Casual	59%	10%
	Retired	65%	8%
	Other	54%	12%
Solar Panels	Yes	58%	12%
	No	59%	9%
Switched Energy Company or Plan	In the past 12 months	59%	18%
	1 to 5 years ago	54%	11%
	NETT switched (last 5 yrs)	56%	14%
	Have not switched at all	61%	6%
Approached by Energy Company	Yes	62%	9%
	No	58%	12%
Actively Investigated Offers	Yes	65%	13%
	No	56%	9%
Electricity Spend (last quarterly bill)	Low (Less than $300)	48%	16%
	Medium ($300 - $399)	68%	7%
	High (more than $400)	70%	6%
Gas Spend (last quarterly bill)	Low (Less than $200)	63%	11%
	Medium ($200-$299)	59%	9%
	High (more than $300)	65%	11%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'd prefer to try and save energy to reduce my bill than to seek out a better deal (SA)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	55%	15%
Location	Metro	54%	16%
	Regional	60%	12%
Gas	Mains connected	56%	15%
	Not connected	55%	15%
Age Group	18 – 34	60%	9%
	35 – 54	53%	17%
	55 and over	57%	15%
Home Ownership	Renters	59%	14%
	Owners	54%	16%
Household Income	Low (less than $50k)	50%	16%
	Medium ($50k -<$100k)	61%	14%
	High (more than $100k)	60%	18%
Currently receiving rebate or concession (electricity or gas)	Yes	58%	16%
	No	54%	15%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	57%	12%
	No	55%	16%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	51%	20%
	No	57%	14%
Employment	Working FT / PT / Casual	58%	13%
	Retired	58%	17%
	Other	49%	18%
Solar Panels	Yes	61%	15%
	No	53%	15%
Switched Energy Company or Plan	In the past 12 months	54%	15%
	1 to 5 years ago	44%	26%
	NETT switched (last 5 yrs)	48%	22%
	Have not switched at all	63%	9%
Approached by Energy Company	Yes	64%	13%
	No	49%	16%
Actively Investigated Offers	Yes	52%	20%
	No	57%	14%
Electricity Spend (last quarterly bill)	Low (Less than $300)	53%	15%
	Medium ($300 - $399)	54%	17%
	High (more than $400)	63%	15%
Gas Spend (last quarterly bill)	Low (Less than $200)	60%	8%
	Medium ($200-$299)	56%	14%
	High (more than $300)	61%	24%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

The amount I could save is not worth the time and effort **(SA)**	**Sub-group**	**Strongly / Somewhat Agree**	**Strongly / Somewhat Disagree**
Total	All residents	49%	19%
Location	Metro	50%	19%
	Regional	46%	19%
Gas	Mains connected	51%	23%
	Not connected	48%	17%
Age Group	18 – 34	55%	16%
	35 – 54	47%	20%
	55 and over	49%	22%
Home Ownership	Renters	47%	21%
	Owners	50%	19%
Household Income	Low (less than $50k)	42%	23%
	Medium ($50k -<$100k)	57%	15%
	High (more than $100k)	56%	21%
Currently receiving rebate or concession (electricity or gas)	Yes	48%	23%
	No	50%	18%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	52%	14%
	No	49%	21%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	53%	21%
	No	48%	19%
Employment	Working FT / PT / Casual	50%	18%
	Retired	58%	20%
	Other	40%	24%
Solar Panels	Yes	55%	24%
	No	47%	18%
Switched Energy Company or Plan	In the past 12 months	40%	30%
	1 to 5 years ago	36%	29%
	NETT switched (last 5 yrs)	38%	29%
	Have not switched at all	60%	10%
Approached by Energy Company	Yes	55%	21%
	No	47%	20%
Actively Investigated Offers	Yes	43%	33%
	No	52%	15%
Electricity Spend (last quarterly bill)	Low (Less than $300)	42%	25%
	Medium ($300 - $399)	48%	27%
	High (more than $400)	58%	11%
Gas Spend (last quarterly bill)	Low (Less than $200)	51%	21%
	Medium ($200-$299)	49%	27%
	High (more than $300)	57%	18%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I can't be bothered looking for a better deal (SA)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	45%	25%
Location	Metro	45%	25%
	Regional	42%	25%
Gas	Mains connected	40%	26%
	Not connected	50%	24%
Age Group	18 – 34	55%	23%
	35 – 54	40%	25%
	55 and over	44%	27%
Home Ownership	Renters	42%	19%
	Owners	45%	28%
Household Income	Low (less than $50k)	37%	28%
	Medium ($50k -<$100k)	45%	21%
	High (more than $100k)	58%	24%
Currently receiving rebate or concession (electricity or gas)	Yes	41%	25%
	No	46%	25%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	50%	13%
	No	43%	27%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	44%	19%
	No	45%	26%
Employment	Working FT / PT / Casual	48%	26%
	Retired	46%	24%
	Other	36%	23%
Solar Panels	Yes	51%	25%
	No	42%	25%
Switched Energy Company or Plan	In the past 12 months	44%	28%
	1 to 5 years ago	40%	32%
	NETT switched (last 5 yrs)	42%	31%
	Have not switched at all	47%	20%
Approached by Energy Company	Yes	52%	24%
	No	38%	27%
Actively Investigated Offers	Yes	34%	39%
	No	49%	21%
Electricity Spend (last quarterly bill)	Low (Less than $300)	38%	28%
	Medium ($300 - $399)	45%	32%
	High (more than $400)	53%	18%
Gas Spend (last quarterly bill)	Low (Less than $200)	41%	27%
	Medium ($200-$299)	29%	32%
	High (more than $300)	56%	14%

Base: All Respondents (n=401)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (SA)	Sub-group	Residents 2015
Total	All residents	59%
Location	Metro	61%
	Regional	52%
Gas	Mains connected	65%
	Not connected	53%
Age Group	18 – 34	68%
	35 – 54	55%
	55 and over	57%
Home Ownership	Renters	55%
	Owners	61%
Household Income	Low (less than $50k)	58%
	Medium ($50k -<$100k)	59%
	High (more than $100k)	60%
Currently receiving rebate or concession (electricity or gas)	Yes	63%
	No	56%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%
	No	57%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	49%
	No	61%
Employment	Working FT / PT / Casual	62%
	Retired	62%
	Other	47%
Solar Panels	Yes	63%
	No	57%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	63%
	NETT switched (last 5 yrs)	64%
	Have not switched at all	54%
Approached by Energy Company	Yes	62%
	No	59%
Actively Investigated Offers	Yes	61%
	No	59%
Electricity Spend (last quarterly bill)	Low (Less than $300)	68%
	Medium ($300 - $399)	60%
	High (more than $400)	51%
Gas Spend (last quarterly bill)	Low (Less than $200)	67%
	Medium ($200-$299)	65%
	High (more than $300)	65%

Base: All Respondents (n=401)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Electricity Companies

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (SA)	Sub-group	Residents 2015
Total	All residents	68%
Location	Metro	69%
	Regional	67%
Gas	Mains connected	72%
	Not connected	65%
Age Group	18 – 34	72%
	35 – 54	67%
	55 and over	67%
Home Ownership	Renters	61%
	Owners	72%
Household Income	Low (less than $50k)	67%
	Medium ($50k -<$100k)	72%
	High (more than $100k)	68%
Currently receiving rebate or concession (electricity or gas)	Yes	74%
	No	65%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	61%
	No	70%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	51%
	No	72%
Employment	Working FT / PT / Casual	68%
	Retired	77%
	Other	63%
Solar Panels	Yes	76%
	No	65%
Switched Energy Company or Plan	In the past 12 months	68%
	1 to 5 years ago	71%
	NETT switched (last 5 yrs)	70%
	Have not switched at all	67%
Approached by Energy Company	Yes	68%
	No	68%
Actively Investigated Offers	Yes	65%
	No	70%
Electricity Spend (last quarterly bill)	Low (Less than $300)	80%
	Medium ($300 - $399)	70%
	High (more than $400)	61%
Gas Spend (last quarterly bill)	Low (Less than $200)	77%
	Medium ($200-$299)	70%
	High (more than $300)	72%

Base: All Respondents (n=401)
Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (SA)	Sub-group	Residents 2015
Total	All residents	65%
Location	Metro	67%
	Regional	61%
Gas	Mains connected	67%
	Not connected	64%
Age Group	18 – 34	71%
	35 – 54	62%
	55 and over	67%
Home Ownership	Renters	59%
	Owners	68%
Household Income	Low (less than $50k)	63%
	Medium ($50k -<$100k)	72%
	High (more than $100k)	66%
Currently receiving rebate or concession (electricity or gas)	Yes	70%
	No	63%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	58%
	No	67%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	55%
	No	68%
Employment	Working FT / PT / Casual	70%
	Retired	73%
	Other	50%
Solar Panels	Yes	70%
	No	63%
Switched Energy Company or Plan	In the past 12 months	75%
	1 to 5 years ago	68%
	NETT switched (last 5 yrs)	70%
	Have not switched at all	61%
Approached by Energy Company	Yes	66%
	No	67%
Actively Investigated Offers	Yes	71%
	No	64%
Electricity Spend (last quarterly bill)	Low (Less than $300)	78%
	Medium ($300 - $399)	72%
	High (more than $400)	57%
Gas Spend (last quarterly bill)	Low (Less than $200)	69%
	Medium ($200-$299)	76%
	High (more than $300)	64%

Base: All Respondents (n=401)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (SA)	Sub-group	Residents 2015
Total	All residents	58%
Location	Metro	58%
	Regional	55%
Gas	Mains connected	65%
	Not connected	50%
Age Group	18 – 34	68%
	35 – 54	55%
	55 and over	53%
Home Ownership	Renters	57%
	Owners	58%
Household Income	Low (less than $50k)	59%
	Medium ($50k -<$100k)	60%
	High (more than $100k)	55%
Currently receiving rebate or concession (electricity or gas)	Yes	63%
	No	55%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	55%
	No	58%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	46%
	No	60%
Employment	Working FT / PT / Casual	58%
	Retired	64%
	Other	52%
Solar Panels	Yes	62%
	No	56%
Switched Energy Company or Plan	In the past 12 months	71%
	1 to 5 years ago	49%
	NETT switched (last 5 yrs)	58%
	Have not switched at all	57%
Approached by Energy Company	Yes	52%
	No	62%
Actively Investigated Offers	Yes	53%
	No	60%
Electricity Spend (last quarterly bill)	Low (Less than $300)	69%
	Medium ($300 - $399)	62%
	High (more than $400)	48%
Gas Spend (last quarterly bill)	Low (Less than $200)	70%
	Medium ($200-$299)	69%
	High (more than $300)	63%

Base: All Respondents (n=401)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Satisfaction with Gas Companies

Satisfaction with Current Gas Company (% Somewhat / Very Satisfied) (SA)	Sub-group	Residents 2015
Total	All residents	69%
Gas	Mains connected	69%
	Not connected	N/A
Age Group	18 – 34	80%
	35 – 54	65%
	55 and over	70%
Home Ownership	Renters	59%
	Owners	73%
Household Income	Low (less than $50k)	69%
	Medium ($50k -<$100k)	70%
	High (more than $100k)	71%
Currently receiving rebate or concession (electricity or gas)	Yes	77%
	No	64%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	75%
	No	68%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	60%
	No	72%
Employment	Working FT / PT / Casual	71%
	Retired	75%
	Other	62%
Solar Panels	Yes	76%
	No	66%
Switched Energy Company or Plan	In the past 12 months	74%
	1 to 5 years ago	76%
	NETT switched (last 5 yrs)	75%
	Have not switched at all	63%
Approached by Energy Company	Yes	70%
	No	67%
Actively Investigated Offers	Yes	72%
	No	69%
Electricity Spend (last quarterly bill)	Low (Less than $300)	82%
	Medium ($300 - $399)	62%
	High (more than $400)	64%
Gas Spend (last quarterly bill)	Low (Less than $200)	72%
	Medium ($200-$299)	75%
	High (more than $300)	70%

Base: All Respondents with mains connected gas (n=202)
Q7. And how satisfied are you with your current gas company?

Rating of Overall Quality of Customer Service Provided by Gas Company (% Rating 7-10) (SA)	Sub-group	Residents 2015
Total	All residents	68%
Gas	Mains connected	68%
	Not connected	N/A
Age Group	18 – 34	83%
	35 – 54	64%
	55 and over	65%
Home Ownership	Renters	62%
	Owners	71%
Household Income	Low (less than $50k)	68%
	Medium ($50k -<$100k)	69%
	High (more than $100k)	70%
Currently receiving rebate or concession (electricity or gas)	Yes	74%
	No	65%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	69%
	No	68%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	60%
	No	71%
Employment	Working FT / PT / Casual	72%
	Retired	70%
	Other	60%
Solar Panels	Yes	74%
	No	65%
Switched Energy Company or Plan	In the past 12 months	84%
	1 to 5 years ago	70%
	NETT switched (last 5 yrs)	77%
	Have not switched at all	59%
Approached by Energy Company	Yes	70%
	No	66%
Actively Investigated Offers	Yes	77%
	No	66%
Electricity Spend (last quarterly bill)	Low (Less than $300)	83%
	Medium ($300 - $399)	67%
	High (more than $400)	61%
Gas Spend (last quarterly bill)	Low (Less than $200)	72%
	Medium ($200-$299)	76%
	High (more than $300)	64%

Base: All Respondents with mains connected gas (n=202)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent.

Rating of Overall Value for Money Provided by Gas Company (% Rating 7-10) (SA)	Sub-group	Residents 2015
Total	All residents	63%
Gas	Mains connected	63%
	Not connected	N/A
Age Group	18 – 34	80%
	35 – 54	59%
	55 and over	56%
Home Ownership	Renters	60%
	Owners	64%
Household Income	Low (less than $50k)	65%
	Medium ($50k -<$100k)	60%
	High (more than $100k)	68%
Currently receiving rebate or concession (electricity or gas)	Yes	70%
	No	59%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	68%
	No	62%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	56%
	No	65%
Employment	Working FT / PT / Casual	66%
	Retired	68%
	Other	54%
Solar Panels	Yes	66%
	No	61%
Switched Energy Company or Plan	In the past 12 months	78%
	1 to 5 years ago	60%
	NETT switched (last 5 yrs)	69%
	Have not switched at all	57%
Approached by Energy Company	Yes	61%
	No	64%
Actively Investigated Offers	Yes	71%
	No	60%
Electricity Spend (last quarterly bill)	Low (Less than $300)	80%
	Medium ($300 - $399)	52%
	High (more than $400)	59%
Gas Spend (last quarterly bill)	Low (Less than $200)	67%
	Medium ($200-$299)	69%
	High (more than $300)	60%

Base: All Respondents with mains connected gas (n=202)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (% Rating 7-10) (SA)	Sub-group	Residents 2015
Total	All residents	54%
Location	Metro	56%
	Regional	48%
Gas	Mains connected	56%
	Not connected	52%
Age Group	18 – 34	71%
	35 – 54	50%
	55 and over	49%
Home Ownership	Renters	50%
	Owners	57%
Household Income	Low (less than $50k)	46%
	Medium ($50k -<$100k)	55%
	High (more than $100k)	66%
Currently receiving rebate or concession (electricity or gas)	Yes	55%
	No	54%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	48%
	No	56%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	51%
	No	55%
Employment	Working FT / PT / Casual	59%
	Retired	56%
	Other	42%
Solar Panels	Yes	63%
	No	51%
Switched Energy Company or Plan	In the past 12 months	60%
	1 to 5 years ago	48%
	NETT switched (last 5 yrs)	52%
	Have not switched at all	56%
Approached by Energy Company	Yes	55%
	No	56%
Actively Investigated Offers	Yes	61%
	No	53%
Electricity Spend (last quarterly bill)	Low (Less than $300)	61%
	Medium ($300 - $399)	53%
	High (more than $400)	55%
Gas Spend (last quarterly bill)	Low (Less than $200)	54%
	Medium ($200-$299)	68%
	High (more than $300)	58%

Base: All Respondents (n=401)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident

Appendix Six: New South Wales Sub-group Tables

Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% True) (NSW)	Sub-group	Residents 2015
Total	All residents	89%
Location	Metro	88%
	Regional	91%
Gas	Mains connected	90%
	Not connected	89%
Age Group	18 – 34	82%
	35 – 54	91%
	55 and over	95%
Home Ownership	Renters	90%
	Owners	89%
Household Income	Low (less than $50k)	89%
	Medium ($50k -<$100k)	90%
	High (more than $100k)	89%
Currently receiving rebate or concession (electricity or gas)	Yes	92%
	No	88%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	78%
	No	91%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	83%
	No	90%
Employment	Working FT / PT / Casual	87%
	Retired	95%
	Other	90%
Solar Panels	Yes	85%
	No	90%
Switched Energy Company or Plan	In the past 12 months	94%
	1 to 5 years ago	96%
	NETT switched (last 5 yrs)	95%
	Have not switched at all	82%
Approached by Energy Company	Yes	91%
	No	87%
Actively Investigated Offers	Yes	90%
	No	89%
Electricity Spend (last quarterly bill)	Low (Less than $300)	89%
	Medium ($300 - $399)	91%
	High (more than $400)	91%
Gas Spend (last quarterly bill)	Low (Less than $200)	100%
	Medium ($200-$299)	85%
	High (more than $300)	86%

Base: All Respondents (n=402)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose Gas Company (% True) (NSW)	Sub-group	Residents 2015
Total	All residents	88%
Location	Metro	89%
	Regional	83%
Gas	Mains connected	88%
	Not connected	N/A
Age Group	18 – 34	85%
	35 – 54	90%
	55 and over	88%
Home Ownership	Renters	89%
	Owners	87%
Household Income	Low (less than $50k)	98%
	Medium ($50k -<$100k)	90%
	High (more than $100k)	86%
Currently receiving rebate or concession (electricity or gas)	Yes	92%
	No	86%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	82%
	No	89%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	87%
	No	88%
Employment	Working FT / PT / Casual	88%
	Retired	93%
	Other	84%
Solar Panels	Yes	85%
	No	89%
Switched Energy Company or Plan	In the past 12 months	91%
	1 to 5 years ago	98%
	NETT switched (last 5 yrs)	94%
	Have not switched at all	80%
Approached by Energy Company	Yes	88%
	No	85%
Actively Investigated Offers	Yes	87%
	No	89%
Electricity Spend (last quarterly bill)	Low (Less than $300)	92%
	Medium ($300 - $399)	85%
	High (more than $400)	89%
Gas Spend (last quarterly bill)	Low (Less than $200)	94%
	Medium ($200-$299)	88%
	High (more than $300)	85%

Base: Respondents with mains connected gas (n=163)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company

Awareness of Being Able to Choose from Different Energy Plans (% True) (NSW)	Sub-group	Electricity 2015	Gas 2015
Total	All residents	81%	74%
Location	Metro	80%	76%
	Regional	81%	68%
Gas	Mains connected	77%	74%
	Not connected	84%	N/A
Age Group	18 – 34	78%	76%
	35 – 54	80%	74%
	55 and over	85%	73%
Home Ownership	Renters	81%	73%
	Owners	81%	75%
Household Income	Low (less than $50k)	79%	71%
	Medium ($50k -<$100k)	82%	77%
	High (more than $100k)	83%	81%
Currently receiving rebate or concession (electricity or gas)	Yes	81%	77%
	No	80%	73%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	76%	85%
	No	81%	72%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	80%	84%
	No	81%	72%
Employment	Working FT / PT / Casual	81%	78%
	Retired	84%	77%
	Other	76%	62%
Solar Panels	Yes	76%	73%
	No	82%	75%
Switched Energy Company or Plan	In the past 12 months	90%	77%
	1 to 5 years ago	82%	83%
	NETT switched (last 5 yrs)	86%	79%
	Have not switched at all	74%	68%
Approached by Energy Company	Yes	83%	82%
	No	76%	65%
Actively Investigated Offers	Yes	86%	78%
	No	79%	73%
Electricity Spend (last quarterly bill)	Low (Less than $300)	77%	68%
	Medium ($300 - $399)	81%	69%
	High (more than $400)	88%	89%
Gas Spend (last quarterly bill)	Low (Less than $200)	81%	79%
	Medium ($200-$299)	77%	70%
	High (more than $300)	82%	80%

Base: All Respondents (n=402) / Base: Respondents with mains connected gas (n=163)
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms / d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	57%
Location	Metro	59%
	Regional	54%
Gas	Mains connected	66%
	Not connected	51%
Age Group	18 – 34	67%
	35 – 54	52%
	55 and over	53%
Home Ownership	Renters	57%
	Owners	57%
Household Income	Low (less than $50k)	55%
	Medium ($50k -<$100k)	56%
	High (more than $100k)	60%
Currently receiving rebate or concession (electricity or gas)	Yes	62%
	No	55%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	83%
	No	53%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	59%
	No	57%
Employment	Working FT / PT / Casual	61%
	Retired	48%
	Other	54%
Solar Panels	Yes	61%
	No	56%
Switched Energy Company or Plan	In the past 12 months	65%
	1 to 5 years ago	50%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	57%
Approached by Energy Company	Yes	65%
	No	51%
Actively Investigated Offers	Yes	67%
	No	53%
Electricity Spend (last quarterly bill)	Low (Less than $300)	57%
	Medium ($300 - $399)	60%
	High (more than $400)	55%
Gas Spend (last quarterly bill)	Low (Less than $200)	62%
	Medium ($200-$299)	63%
	High (more than $300)	69%

Base: All Respondents (n=402)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

Market Participation

Incidence of Switching or Investigating Offers

Switched Energy Company or Plan (% Yes) (NSW)	Sub-group	Past 5 Years	Past 12 Months	Not Switched
Total	All residents	53%	24%	47%
Location	Metro	50%	23%	50%
	Regional	59%	27%	41%
Gas	Mains connected	55%	31%	45%
	Not connected	52%	19%	48%
Age Group	18 – 34	44%	23%	56%
	35 – 54	57%	23%	43%
	55 and over	58%	28%	42%
Home Ownership	Renters	45%	16%	55%
	Owners	56%	27%	44%
Household Income	Low (less than $50k)	58%	22%	42%
	Medium ($50k -<$100k)	51%	21%	49%
	High (more than $100k)	55%	34%	45%
Currently receiving rebate or concession (electricity or gas)	Yes	65%	31%	35%
	No	47%	21%	53%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	55%	30%	45%
	No	53%	23%	47%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	55%	27%	45%
	No	53%	24%	47%
Employment	Working FT / PT / Casual	53%	25%	47%
	Retired	58%	28%	42%
	Other	48%	20%	52%
Solar Panels	Yes	70%	42%	30%
	No	49%	20%	51%
Approached by Energy Company	Yes	62%	38%	38%
	No	47%	17%	53%
Actively Investigated Offers	Yes	68%	50%	32%
	No	46%	12%	54%
Electricity Spend (last quarterly bill)	Low (Less than $300)	53%	23%	47%
	Medium ($300 - $399)	52%	22%	48%
	High (more than $400)	59%	29%	41%
Gas Spend (last quarterly bill)	Low (Less than $200)	50%	23%	50%
	Medium ($200-$299)	58%	35%	42%
	High (more than $300)	68%	41%	32%

Base: All Respondents (n=402)
Q17. A) In the past 5 years, how many times have you changed the following?
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Approached by an Energy Company in Past 12 Months (% Yes) (NSW)	Sub-group	Residents 2015
Total	All residents	39%
Location	Metro	43%
	Regional	31%
Gas	Mains connected	44%
	Not connected	35%
Age Group	18 – 34	39%
	35 – 54	35%
	55 and over	47%
Home Ownership	Renters	35%
	Owners	41%
Household Income	Low (less than $50k)	37%
	Medium ($50k -<$100k)	39%
	High (more than $100k)	43%
Currently receiving rebate or concession (electricity or gas)	Yes	44%
	No	36%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	59%
	No	36%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	57%
	No	35%
Employment	Working FT / PT / Casual	38%
	Retired	41%
	Other	39%
Solar Panels	Yes	50%
	No	36%
Switched Energy Company or Plan	In the past 12 months	61%
	1 to 5 years ago	32%
	NETT switched (last 5 yrs)	45%
	Have not switched at all	31%
Approached by Energy Company	Yes	100%
	No	N/A
Actively Investigated Offers	Yes	59%
	No	29%
Electricity Spend (last quarterly bill)	Low (Less than $300)	36%
	Medium ($300 - $399)	42%
	High (more than $400)	43%
Gas Spend (last quarterly bill)	Low (Less than $200)	37%
	Medium ($200-$299)	52%
	High (more than $300)	54%

Base: All Respondents (n=402)
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Actively Investigated Offers or Options (% Yes) (NSW)	Sub-group	Residents 2015
Total	All residents	33%
Location	Metro	35%
	Regional	30%
Gas	Mains connected	38%
	Not connected	29%
Age Group	18 – 34	34%
	35 – 54	35%
	55 and over	29%
Home Ownership	Renters	26%
	Owners	36%
Household Income	Low (less than $50k)	26%
	Medium ($50k -<$100k)	29%
	High (more than $100k)	44%
Currently receiving rebate or concession (electricity or gas)	Yes	35%
	No	32%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	36%
	No	32%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	36%
	No	32%
Employment	Working FT / PT / Casual	34%
	Retired	28%
	Other	33%
Solar Panels	Yes	50%
	No	29%
Switched Energy Company or Plan	In the past 12 months	68%
	1 to 5 years ago	21%
	NETT switched (last 5 yrs)	43%
	Have not switched at all	22%
Approached by Energy Company	Yes	50%
	No	23%
Actively Investigated Offers	Yes	100%
	No	N/A
Electricity Spend (last quarterly bill)	Low (Less than $300)	27%
	Medium ($300 - $399)	36%
	High (more than $400)	38%
Gas Spend (last quarterly bill)	Low (Less than $200)	34%
	Medium ($200-$299)	39%
	High (more than $300)	48%

Base: All Respondents (n=402)
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Switching Intentions and Attitudes

Interest in Looking for a Better Deal (NSW)	Sub-group	Interested / Currently Looking	Not Interested in Switching
Total	All residents	51%	33%
Location	Metro	54%	34%
	Regional	46%	32%
Gas	Mains connected	61%	25%
	Not connected	43%	40%
Age Group	18 – 34	56%	38%
	35 – 54	51%	30%
	55 and over	43%	34%
Home Ownership	Renters	49%	34%
	Owners	53%	33%
Household Income	Low (less than $50k)	38%	39%
	Medium ($50k -<$100k)	51%	35%
	High (more than $100k)	65%	25%
Currently receiving rebate or concession (electricity or gas)	Yes	53%	31%
	No	50%	35%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	66%	23%
	No	49%	35%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	69%	22%
	No	47%	36%
Employment	Working FT / PT / Casual	56%	32%
	Retired	40%	38%
	Other	46%	34%
Solar Panels	Yes	55%	22%
	No	50%	36%
Switched Energy Company or Plan	In the past 12 months	56%	13%
	1 to 5 years ago	57%	32%
	NETT switched (last 5 yrs)	56%	23%
	Have not switched at all	45%	45%
Approached by Energy Company	Yes	52%	33%
	No	50%	33%
Actively Investigated Offers	Yes	64%	16%
	No	45%	43%
Electricity Spend (last quarterly bill)	Low (Less than $300)	42%	43%
	Medium ($300 - $399)	50%	38%
	High (more than $400)	61%	24%
Gas Spend (last quarterly bill)	Low (Less than $200)	48%	31%
	Medium ($200-$299)	63%	21%
	High (more than $300)	74%	22%

Base: All Respondents (n=402)
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

I'd switch if I was not satisfied with my current company (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	82%	3%
Location	Metro	81%	3%
	Regional	84%	4%
Gas	Mains connected	80%	4%
	Not connected	83%	3%
Age Group	18 – 34	79%	2%
	35 – 54	85%	4%
	55 and over	80%	5%
Home Ownership	Renters	89%	0%
	Owners	79%	5%
Household Income	Low (less than $50k)	85%	3%
	Medium ($50k -<$100k)	83%	3%
	High (more than $100k)	85%	2%
Currently receiving rebate or concession (electricity or gas)	Yes	86%	2%
	No	80%	4%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	75%	4%
	No	83%	3%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	79%	3%
	No	83%	3%
Employment	Working FT / PT / Casual	83%	2%
	Retired	83%	6%
	Other	79%	5%
Solar Panels	Yes	81%	5%
	No	82%	3%
Switched Energy Company or Plan	In the past 12 months	88%	4%
	1 to 5 years ago	83%	1%
	NETT switched (last 5 yrs)	85%	2%
	Have not switched at all	78%	4%
Approached by Energy Company	Yes	85%	4%
	No	78%	4%
Actively Investigated Offers	Yes	86%	4%
	No	82%	3%
Electricity Spend (last quarterly bill)	Low (Less than $300)	85%	0%
	Medium ($300 - $399)	92%	4%
	High (more than $400)	81%	4%
Gas Spend (last quarterly bill)	Low (Less than $200)	88%	0%
	Medium ($200-$299)	82%	3%
	High (more than $300)	81%	8%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'm concerned if I switch there might be hidden fees and charges (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	68%	12%
Location	Metro	68%	12%
	Regional	69%	11%
Gas	Mains connected	72%	13%
	Not connected	66%	11%
Age Group	18 – 34	71%	8%
	35 – 54	68%	13%
	55 and over	64%	14%
Home Ownership	Renters	71%	11%
	Owners	68%	12%
Household Income	Low (less than $50k)	73%	9%
	Medium ($50k -<$100k)	74%	6%
	High (more than $100k)	64%	18%
Currently receiving rebate or concession (electricity or gas)	Yes	74%	12%
	No	65%	11%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	77%	4%
	No	67%	13%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	80%	1%
	No	66%	14%
Employment	Working FT / PT / Casual	70%	10%
	Retired	63%	17%
	Other	68%	11%
Solar Panels	Yes	72%	11%
	No	67%	12%
Switched Energy Company or Plan	In the past 12 months	68%	16%
	1 to 5 years ago	67%	12%
	NETT switched (last 5 yrs)	68%	14%
	Have not switched at all	69%	9%
Approached by Energy Company	Yes	73%	10%
	No	65%	14%
Actively Investigated Offers	Yes	66%	21%
	No	71%	7%
Electricity Spend (last quarterly bill)	Low (Less than $300)	70%	10%
	Medium ($300 - $399)	73%	12%
	High (more than $400)	74%	10%
Gas Spend (last quarterly bill)	Low (Less than $200)	79%	11%
	Medium ($200-$299)	77%	12%
	High (more than $300)	76%	14%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

It's too complicated to try and compare the various options and offers available (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	53%	24%
Location	Metro	55%	22%
	Regional	50%	28%
Gas	Mains connected	58%	22%
	Not connected	50%	26%
Age Group	18 – 34	56%	17%
	35 – 54	51%	29%
	55 and over	55%	23%
Home Ownership	Renters	57%	19%
	Owners	52%	26%
Household Income	Low (less than $50k)	52%	27%
	Medium ($50k -<$100k)	64%	19%
	High (more than $100k)	41%	31%
Currently receiving rebate or concession (electricity or gas)	Yes	56%	24%
	No	52%	24%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%	16%
	No	52%	25%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	70%	11%
	No	50%	27%
Employment	Working FT / PT / Casual	55%	23%
	Retired	55%	25%
	Other	49%	26%
Solar Panels	Yes	61%	20%
	No	52%	25%
Switched Energy Company or Plan	In the past 12 months	51%	28%
	1 to 5 years ago	44%	30%
	NETT switched (last 5 yrs)	47%	29%
	Have not switched at all	60%	18%
Approached by Energy Company	Yes	56%	27%
	No	50%	25%
Actively Investigated Offers	Yes	49%	33%
	No	58%	19%
Electricity Spend (last quarterly bill)	Low (Less than $300)	53%	28%
	Medium ($300 - $399)	57%	23%
	High (more than $400)	58%	22%
Gas Spend (last quarterly bill)	Low (Less than $200)	67%	21%
	Medium ($200-$299)	55%	21%
	High (more than $300)	61%	21%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I generally don't trust energy companies that promise a better deal (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	52%	16%
Location	Metro	53%	15%
	Regional	50%	19%
Gas	Mains connected	55%	18%
	Not connected	50%	15%
Age Group	18 – 34	50%	15%
	35 – 54	51%	17%
	55 and over	54%	17%
Home Ownership	Renters	53%	16%
	Owners	51%	17%
Household Income	Low (less than $50k)	54%	17%
	Medium ($50k -<$100k)	51%	14%
	High (more than $100k)	50%	23%
Currently receiving rebate or concession (electricity or gas)	Yes	54%	18%
	No	50%	15%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	73%	10%
	No	48%	17%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	74%	8%
	No	47%	18%
Employment	Working FT / PT / Casual	54%	16%
	Retired	50%	21%
	Other	47%	12%
Solar Panels	Yes	65%	16%
	No	48%	16%
Switched Energy Company or Plan	In the past 12 months	51%	25%
	1 to 5 years ago	49%	21%
	NETT switched (last 5 yrs)	50%	23%
	Have not switched at all	54%	9%
Approached by Energy Company	Yes	59%	18%
	No	44%	17%
Actively Investigated Offers	Yes	51%	24%
	No	53%	13%
Electricity Spend (last quarterly bill)	Low (Less than $300)	48%	18%
	Medium ($300 - $399)	49%	23%
	High (more than $400)	63%	13%
Gas Spend (last quarterly bill)	Low (Less than $200)	51%	15%
	Medium ($200-$299)	48%	25%
	High (more than $300)	75%	14%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'd prefer to try and save energy to reduce my bill than to seek out a better deal (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	48%	21%
Location	Metro	49%	20%
	Regional	46%	23%
Gas	Mains connected	49%	24%
	Not connected	48%	20%
Age Group	18 – 34	58%	19%
	35 – 54	44%	21%
	55 and over	42%	26%
Home Ownership	Renters	46%	15%
	Owners	49%	24%
Household Income	Low (less than $50k)	49%	18%
	Medium ($50k -<$100k)	50%	20%
	High (more than $100k)	44%	30%
Currently receiving rebate or concession (electricity or gas)	Yes	51%	19%
	No	47%	22%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%	7%
	No	46%	24%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	52%	14%
	No	47%	23%
Employment	Working FT / PT / Casual	52%	20%
	Retired	42%	26%
	Other	42%	21%
Solar Panels	Yes	53%	27%
	No	47%	20%
Switched Energy Company or Plan	In the past 12 months	45%	32%
	1 to 5 years ago	47%	23%
	NETT switched (last 5 yrs)	46%	27%
	Have not switched at all	51%	15%
Approached by Energy Company	Yes	56%	23%
	No	38%	22%
Actively Investigated Offers	Yes	44%	31%
	No	51%	17%
Electricity Spend (last quarterly bill)	Low (Less than $300)	52%	20%
	Medium ($300 - $399)	49%	23%
	High (more than $400)	49%	24%
Gas Spend (last quarterly bill)	Low (Less than $200)	52%	24%
	Medium ($200-$299)	39%	39%
	High (more than $300)	60%	16%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

The amount I could save is not worth the time and effort (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	40%	34%
Location	Metro	43%	31%
	Regional	33%	38%
Gas	Mains connected	47%	34%
	Not connected	35%	35%
Age Group	18 – 34	44%	29%
	35 – 54	35%	38%
	55 and over	43%	34%
Home Ownership	Renters	37%	25%
	Owners	41%	38%
Household Income	Low (less than $50k)	38%	32%
	Medium ($50k -<$100k)	39%	34%
	High (more than $100k)	40%	41%
Currently receiving rebate or concession (electricity or gas)	Yes	44%	30%
	No	38%	36%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%	24%
	No	38%	35%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	46%	23%
	No	38%	36%
Employment	Working FT / PT / Casual	40%	37%
	Retired	43%	32%
	Other	35%	27%
Solar Panels	Yes	48%	31%
	No	38%	35%
Switched Energy Company or Plan	In the past 12 months	41%	40%
	1 to 5 years ago	26%	48%
	NETT switched (last 5 yrs)	33%	44%
	Have not switched at all	47%	22%
Approached by Energy Company	Yes	45%	35%
	No	35%	32%
Actively Investigated Offers	Yes	39%	45%
	No	41%	29%
Electricity Spend (last quarterly bill)	Low (Less than $300)	39%	36%
	Medium ($300 - $399)	48%	35%
	High (more than $400)	41%	33%
Gas Spend (last quarterly bill)	Low (Less than $200)	44%	34%
	Medium ($200-$299)	50%	37%
	High (more than $300)	55%	33%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I can't be bothered looking for a better deal (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	39%	35%
Location	Metro	41%	33%
	Regional	36%	39%
Gas	Mains connected	46%	30%
	Not connected	34%	39%
Age Group	18 – 34	48%	25%
	35 – 54	36%	41%
	55 and over	33%	36%
Home Ownership	Renters	40%	32%
	Owners	39%	36%
Household Income	Low (less than $50k)	40%	33%
	Medium ($50k -<$100k)	42%	31%
	High (more than $100k)	38%	42%
Currently receiving rebate or concession (electricity or gas)	Yes	41%	32%
	No	38%	36%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	55%	20%
	No	36%	37%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	55%	19%
	No	35%	38%
Employment	Working FT / PT / Casual	42%	35%
	Retired	34%	36%
	Other	33%	33%
Solar Panels	Yes	46%	37%
	No	37%	34%
Switched Energy Company or Plan	In the past 12 months	40%	48%
	1 to 5 years ago	35%	37%
	NETT switched (last 5 yrs)	37%	42%
	Have not switched at all	41%	27%
Approached by Energy Company	Yes	47%	35%
	No	33%	35%
Actively Investigated Offers	Yes	35%	53%
	No	42%	26%
Electricity Spend (last quarterly bill)	Low (Less than $300)	37%	32%
	Medium ($300 - $399)	40%	43%
	High (more than $400)	44%	34%
Gas Spend (last quarterly bill)	Low (Less than $200)	51%	20%
	Medium ($200-$299)	31%	40%
	High (more than $300)	58%	32%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (NSW)	Sub-group	Residents 2015
Total	All residents	60%
Location	Metro	62%
	Regional	57%
Gas	Mains connected	66%
	Not connected	56%
Age Group	18 – 34	74%
	35 – 54	54%
	55 and over	52%
Home Ownership	Renters	59%
	Owners	61%
Household Income	Low (less than $50k)	57%
	Medium ($50k -<$100k)	63%
	High (more than $100k)	61%
Currently receiving rebate or concession (electricity or gas)	Yes	59%
	No	60%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	69%
	No	58%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	52%
	No	62%
Employment	Working FT / PT / Casual	63%
	Retired	50%
	Other	60%
Solar Panels	Yes	64%
	No	59%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	59%
	NETT switched (last 5 yrs)	62%
	Have not switched at all	58%
Approached by Energy Company	Yes	61%
	No	60%
Actively Investigated Offers	Yes	58%
	No	62%
Electricity Spend (last quarterly bill)	Low (Less than $300)	67%
	Medium ($300 - $399)	58%
	High (more than $400)	61%
Gas Spend (last quarterly bill)	Low (Less than $200)	74%
	Medium ($200-$299)	48%
	High (more than $300)	72%

Base: All Respondents (n=402)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Electricity Companies

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (NSW)	Sub-group	Residents 2015
Total	All residents	74%
Location	Metro	76%
	Regional	71%
Gas	Mains connected	80%
	Not connected	71%
Age Group	18 – 34	78%
	35 – 54	73%
	55 and over	72%
Home Ownership	Renters	71%
	Owners	76%
Household Income	Low (less than $50k)	81%
	Medium ($50k -<$100k)	72%
	High (more than $100k)	79%
Currently receiving rebate or concession (electricity or gas)	Yes	79%
	No	72%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	85%
	No	73%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	69%
	No	76%
Employment	Working FT / PT / Casual	74%
	Retired	73%
	Other	76%
Solar Panels	Yes	77%
	No	74%
Switched Energy Company or Plan	In the past 12 months	83%
	1 to 5 years ago	71%
	NETT switched (last 5 yrs)	76%
	Have not switched at all	72%
Approached by Energy Company	Yes	80%
	No	75%
Actively Investigated Offers	Yes	77%
	No	75%
Electricity Spend (last quarterly bill)	Low (Less than $300)	84%
	Medium ($300 - $399)	73%
	High (more than $400)	73%
Gas Spend (last quarterly bill)	Low (Less than $200)	87%
	Medium ($200-$299)	83%
	High (more than $300)	74%

Base: All Respondents (n=402)
Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	65%
Location	Metro	67%
	Regional	63%
Gas	Mains connected	73%
	Not connected	60%
Age Group	18 – 34	74%
	35 – 54	58%
	55 and over	68%
Home Ownership	Renters	60%
	Owners	68%
Household Income	Low (less than $50k)	70%
	Medium ($50k -<$100k)	62%
	High (more than $100k)	71%
Currently receiving rebate or concession (electricity or gas)	Yes	68%
	No	64%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	78%
	No	63%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	58%
	No	67%
Employment	Working FT / PT / Casual	67%
	Retired	67%
	Other	59%
Solar Panels	Yes	66%
	No	65%
Switched Energy Company or Plan	In the past 12 months	77%
	1 to 5 years ago	58%
	NETT switched (last 5 yrs)	67%
	Have not switched at all	64%
Approached by Energy Company	Yes	69%
	No	65%
Actively Investigated Offers	Yes	69%
	No	65%
Electricity Spend (last quarterly bill)	Low (Less than $300)	72%
	Medium ($300 - $399)	65%
	High (more than $400)	68%
Gas Spend (last quarterly bill)	Low (Less than $200)	72%
	Medium ($200-$299)	71%
	High (more than $300)	80%

Base: All Respondents (n=402)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	56%
Location	Metro	55%
	Regional	56%
Gas	Mains connected	64%
	Not connected	50%
Age Group	18 – 34	66%
	35 – 54	51%
	55 and over	51%
Home Ownership	Renters	50%
	Owners	58%
Household Income	Low (less than $50k)	55%
	Medium ($50k -<$100k)	55%
	High (more than $100k)	64%
Currently receiving rebate or concession (electricity or gas)	Yes	58%
	No	54%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	68%
	No	54%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	46%
	No	58%
Employment	Working FT / PT / Casual	60%
	Retired	53%
	Other	45%
Solar Panels	Yes	63%
	No	54%
Switched Energy Company or Plan	In the past 12 months	65%
	1 to 5 years ago	49%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	55%
Approached by Energy Company	Yes	60%
	No	55%
Actively Investigated Offers	Yes	58%
	No	55%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%
	Medium ($300 - $399)	60%
	High (more than $400)	52%
Gas Spend (last quarterly bill)	Low (Less than $200)	61%
	Medium ($200-$299)	66%
	High (more than $300)	68%

Base: All Respondents (n=402)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Satisfaction with Gas Companies

Satisfaction with Current Gas Company (% Somewhat / Very Satisfied) (NSW)	Sub-group	Residents 2015
Total	All residents	79%
Location	Metro	79%
	Regional	80%
Gas	Mains connected	79%
	Not connected	N/A
Age Group	18 – 34	85%
	35 – 54	76%
	55 and over	78%
Home Ownership	Renters	70%
	Owners	83%
Household Income	Low (less than $50k)	83%
	Medium ($50k -<$100k)	81%
	High (more than $100k)	84%
Currently receiving rebate or concession (electricity or gas)	Yes	89%
	No	75%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	90%
	No	77%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	86%
	No	78%
Employment	Working FT / PT / Casual	78%
	Retired	80%
	Other	83%
Solar Panels	Yes	88%
	No	77%
Switched Energy Company or Plan	In the past 12 months	90%
	1 to 5 years ago	71%
	NETT switched (last 5 yrs)	82%
	Have not switched at all	77%
Approached by Energy Company	Yes	88%
	No	75%
Actively Investigated Offers	Yes	81%
	No	80%
Electricity Spend (last quarterly bill)	Low (Less than $300)	84%
	Medium ($300 - $399)	78%
	High (more than $400)	83%
Gas Spend (last quarterly bill)	Low (Less than $200)	83%
	Medium ($200-$299)	80%
	High (more than $300)	80%

Base: All Respondents with mains connected gas (n=163)
Q7. And how satisfied are you with your current gas company?

Rating of Overall Quality of Customer Service Provided by Gas Company (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	72%
Location	Metro	71%
	Regional	75%
Gas	Mains connected	72%
	Not connected	N/A
Age Group	18 – 34	78%
	35 – 54	69%
	55 and over	70%
Home Ownership	Renters	58%
	Owners	77%
Household Income	Low (less than $50k)	70%
	Medium ($50k -<$100k)	72%
	High (more than $100k)	73%
Currently receiving rebate or concession (electricity or gas)	Yes	80%
	No	69%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	90%
	No	69%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	78%
	No	71%
Employment	Working FT / PT / Casual	73%
	Retired	73%
	Other	68%
Solar Panels	Yes	79%
	No	70%
Switched Energy Company or Plan	In the past 12 months	78%
	1 to 5 years ago	56%
	NETT switched (last 5 yrs)	68%
	Have not switched at all	77%
Approached by Energy Company	Yes	75%
	No	72%
Actively Investigated Offers	Yes	72%
	No	73%
Electricity Spend (last quarterly bill)	Low (Less than $300)	73%
	Medium ($300 - $399)	57%
	High (more than $400)	79%
Gas Spend (last quarterly bill)	Low (Less than $200)	73%
	Medium ($200-$299)	67%
	High (more than $300)	73%

Base: All Respondents with mains connected gas (n=163)
Q8. How would you rate the overall quality of customer service provided by your gas company? Please use a scale where 0 means very poor and 10 is excellent.

Rating of Overall Value for Money Provided by Gas Company (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	61%
Location	Metro	61%
	Regional	63%
Gas	Mains connected	61%
	Not connected	N/A
Age Group	18 – 34	76%
	35 – 54	55%
	55 and over	51%
Home Ownership	Renters	43%
	Owners	68%
Household Income	Low (less than $50k)	50%
	Medium ($50k -<$100k)	60%
	High (more than $100k)	75%
Currently receiving rebate or concession (electricity or gas)	Yes	71%
	No	57%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	81%
	No	57%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	68%
	No	60%
Employment	Working FT / PT / Casual	66%
	Retired	57%
	Other	46%
Solar Panels	Yes	67%
	No	59%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	45%
	NETT switched (last 5 yrs)	57%
	Have not switched at all	67%
Approached by Energy Company	Yes	65%
	No	58%
Actively Investigated Offers	Yes	65%
	No	60%
Electricity Spend (last quarterly bill)	Low (Less than $300)	59%
	Medium ($300 - $399)	55%
	High (more than $400)	70%
Gas Spend (last quarterly bill)	Low (Less than $200)	57%
	Medium ($200-$299)	61%
	High (more than $300)	69%

Base: All Respondents with mains connected gas (n=163)
Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	55%
Location	Metro	55%
	Regional	55%
Gas	Mains connected	60%
	Not connected	52%
Age Group	18 – 34	71%
	35 – 54	49%
	55 and over	46%
Home Ownership	Renters	57%
	Owners	54%
Household Income	Low (less than $50k)	52%
	Medium ($50k -<$100k)	54%
	High (more than $100k)	61%
Currently receiving rebate or concession (electricity or gas)	Yes	53%
	No	57%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	71%
	No	53%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	48%
	No	57%
Employment	Working FT / PT / Casual	60%
	Retired	42%
	Other	51%
Solar Panels	Yes	60%
	No	54%
Switched Energy Company or Plan	In the past 12 months	64%
	1 to 5 years ago	54%
	NETT switched (last 5 yrs)	59%
	Have not switched at all	51%
Approached by Energy Company	Yes	63%
	No	50%
Actively Investigated Offers	Yes	71%
	No	48%
Electricity Spend (last quarterly bill)	Low (Less than $300)	52%
	Medium ($300 - $399)	60%
	High (more than $400)	58%
Gas Spend (last quarterly bill)	Low (Less than $200)	52%
	Medium ($200-$299)	61%
	High (more than $300)	72%

Base: All Respondents (n=402)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident

Appendix Seven: Southeast Queensland Sub-group Tables

Customer Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% True) (NSW)	Sub-group	Residents 2015
Total	All residents	89%
Location	Metro	90%
	Regional	88%
Gas	Mains connected	86%
	Not connected	90%
Age Group	18 – 34	93%
	35 – 54	87%
	55 and over	91%
Home Ownership	Renters	92%
	Owners	88%
Household Income	Low (less than $50k)	86%
	Medium ($50k -<$100k)	92%
	High (more than $100k)	91%
Currently receiving rebate or concession (electricity or gas)	Yes	85%
	No	91%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	78%
	No	91%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	82%
	No	91%
Employment	Working FT / PT / Casual	89%
	Retired	89%
	Other	90%
Solar Panels	Yes	88%
	No	90%
Switched Energy Company or Plan	In the past 12 months	95%
	1 to 5 years ago	96%
	NETT switched (last 5 yrs)	96%
	Have not switched at all	84%
Approached by Energy Company	Yes	90%
	No	89%
Actively Investigated Offers	Yes	86%
	No	92%
Electricity Spend (last quarterly bill)	Low (Less than $300)	92%
	Medium ($300 - $399)	94%
	High (more than $400)	87%

Base: All Respondents (n=402)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose from Different Energy Plans (% True) (NSW)	Sub-group	Electricity 2015
Total	All residents	71%
Location	Metro	76%
	Regional	63%
Gas	Mains connected	78%
	Not connected	70%
Age Group	18 – 34	73%
	35 – 54	68%
	55 and over	78%
Home Ownership	Renters	69%
	Owners	73%
Household Income	Low (less than $50k)	65%
	Medium ($50k -<$100k)	79%
	High (more than $100k)	70%
Currently receiving rebate or concession (electricity or gas)	Yes	70%
	No	72%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%
	No	72%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	66%
	No	73%
Employment	Working FT / PT / Casual	73%
	Retired	72%
	Other	67%
Solar Panels	Yes	73%
	No	71%
Switched Energy Company or Plan	In the past 12 months	82%
	1 to 5 years ago	75%
	NETT switched (last 5 yrs)	78%
	Have not switched at all	66%
Approached by Energy Company	Yes	85%
	No	67%
Actively Investigated Offers	Yes	76%
	No	71%
Electricity Spend (last quarterly bill)	Low (Less than $300)	76%
	Medium ($300 - $399)	81%
	High (more than $400)	67%

Base: All Respondents (n=402) NB: Results for gas not shown due to small sample sizes of individual segments Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	51%
Location	Metro	52%
	Regional	49%
Gas	Mains connected	63%
	Not connected	49%
Age Group	18 – 34	61%
	35 – 54	47%
	55 and over	52%
Home Ownership	Renters	52%
	Owners	51%
Household Income	Low (less than $50k)	47%
	Medium ($50k -<$100k)	58%
	High (more than $100k)	54%
Currently receiving rebate or concession (electricity or gas)	Yes	61%
	No	47%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	65%
	No	49%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	55%
	No	50%
Employment	Working FT / PT / Casual	51%
	Retired	56%
	Other	48%
Solar Panels	Yes	60%
	No	47%
Switched Energy Company or Plan	In the past 12 months	60%
	1 to 5 years ago	46%
	NETT switched (last 5 yrs)	52%
	Have not switched at all	51%
Approached by Energy Company	Yes	58%
	No	50%
Actively Investigated Offers	Yes	64%
	No	46%
Electricity Spend (last quarterly bill)	Low (Less than $300)	51%
	Medium ($300 - $399)	61%
	High (more than $400)	51%

Base: All Respondents (n=402)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

Market Participation

Incidence of Switching or Investigating Offers

Switched Energy Company or Plan (% Yes) (NSW)	Sub-group	Past 5 Years	Past 12 Months	Not Switched
Total	All residents	47%	19%	53%
Location	Metro	51%	20%	49%
	Regional	39%	16%	61%
Gas	Mains connected	53%	28%	47%
	Not connected	46%	17%	54%
Age Group	18 – 34	55%	24%	45%
	35 – 54	43%	16%	57%
	55 and over	50%	19%	50%
Home Ownership	Renters	43%	20%	57%
	Owners	50%	18%	50%
Household Income	Low (less than $50k)	37%	11%	63%
	Medium ($50k -<$100k)	52%	25%	48%
	High (more than $100k)	56%	19%	44%
Currently receiving rebate or concession (electricity or gas)	Yes	45%	19%	55%
	No	48%	19%	52%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%	30%	51%
	No	47%	17%	53%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	51%	24%	49%
	No	46%	17%	54%
Employment	Working FT / PT / Casual	48%	22%	52%
	Retired	49%	14%	51%
	Other	45%	14%	55%
Solar Panels	Yes	53%	22%	47%
	No	45%	17%	55%
Approached by Energy Company	Yes	65%	35%	35%
	No	41%	13%	59%
Actively Investigated Offers	Yes	66%	40%	34%
	No	41%	11%	59%
Electricity Spend (last quarterly bill)	Low (Less than $300)	50%	18%	50%
	Medium ($300 - $399)	48%	23%	52%
	High (more than $400)	50%	19%	50%

Base: All Respondents (n=402)
Q17. A) In the past 5 years, how many times have you changed the following?
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Approached by an Energy Company in Past 12 Months (% Yes) (NSW)	Sub-group	Residents 2015
Total	All residents	28%
Location	Metro	33%
	Regional	17%
Gas	Mains connected	46%
	Not connected	24%
Age Group	18 – 34	30%
	35 – 54	29%
	55 and over	23%
Home Ownership	Renters	26%
	Owners	29%
Household Income	Low (less than $50k)	21%
	Medium ($50k -<$100k)	33%
	High (more than $100k)	31%
Currently receiving rebate or concession (electricity or gas)	Yes	32%
	No	26%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%
	No	25%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	40%
	No	25%
Employment	Working FT / PT / Casual	32%
	Retired	24%
	Other	20%
Solar Panels	Yes	34%
	No	25%
Switched Energy Company or Plan	In the past 12 months	52%
	1 to 5 years ago	29%
	NETT switched (last 5 yrs)	38%
	Have not switched at all	19%
Approached by Energy Company	Yes	100%
	No	0%
Actively Investigated Offers	Yes	46%
	No	22%
Electricity Spend (last quarterly bill)	Low (Less than $300)	30%
	Medium ($300 - $399)	35%
	High (more than $400)	26%

Base: All Respondents (n=402)
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Actively Investigated Offers or Options (% Yes) (NSW)	Sub-group	Residents 2015
Total	All residents	25%
Location	Metro	30%
	Regional	16%
Gas	Mains connected	38%
	Not connected	23%
Age Group	18 – 34	27%
	35 – 54	24%
	55 and over	25%
Home Ownership	Renters	21%
	Owners	27%
Household Income	Low (less than $50k)	20%
	Medium ($50k -<$100k)	32%
	High (more than $100k)	27%
Currently receiving rebate or concession (electricity or gas)	Yes	33%
	No	22%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	46%
	No	22%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	39%
	No	22%
Employment	Working FT / PT / Casual	27%
	Retired	26%
	Other	21%
Solar Panels	Yes	37%
	No	20%
Switched Energy Company or Plan	In the past 12 months	53%
	1 to 5 years ago	23%
	NETT switched (last 5 yrs)	35%
	Have not switched at all	16%
Approached by Energy Company	Yes	41%
	No	20%
Actively Investigated Offers	Yes	100%
	No	0%
Electricity Spend (last quarterly bill)	Low (Less than $300)	26%
	Medium ($300 - $399)	23%
	High (more than $400)	30%

Base: All Respondents (n=402)
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Switching Intentions and Attitudes

Interest in Looking for a Better Deal (NSW)	Sub-group	Interested / Currently Looking	Not Interested in Switching
Total	All residents	52%	33%
Location	Metro	54%	33%
	Regional	49%	31%
Gas	Mains connected	72%	21%
	Not connected	49%	35%
Age Group	18 – 34	55%	24%
	35 – 54	54%	31%
	55 and over	44%	43%
Home Ownership	Renters	47%	33%
	Owners	55%	33%
Household Income	Low (less than $50k)	42%	39%
	Medium ($50k -<$100k)	60%	29%
	High (more than $100k)	60%	25%
Currently receiving rebate or concession (electricity or gas)	Yes	54%	32%
	No	51%	33%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	77%	15%
	No	48%	35%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	72%	15%
	No	47%	37%
Employment	Working FT / PT / Casual	59%	27%
	Retired	49%	40%
	Other	36%	40%
Solar Panels	Yes	56%	35%
	No	50%	31%
Switched Energy Company or Plan	In the past 12 months	58%	9%
	1 to 5 years ago	60%	29%
	NETT switched (last 5 yrs)	59%	21%
	Have not switched at all	46%	43%
Approached by Energy Company	Yes	60%	29%
	No	48%	34%
Actively Investigated Offers	Yes	65%	18%
	No	48%	38%
Electricity Spend (last quarterly bill)	Low (Less than $300)	49%	38%
	Medium ($300 - $399)	51%	40%
	High (more than $400)	61%	24%

Base: All Respondents (n=402)
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

I'd switch if I was not satisfied with my current company (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	77%	4%
Location	Metro	80%	3%
	Regional	73%	5%
Gas	Mains connected	80%	9%
	Not connected	77%	3%
Age Group	18 – 34	80%	3%
	35 – 54	74%	5%
	55 and over	81%	3%
Home Ownership	Renters	76%	5%
	Owners	78%	4%
Household Income	Low (less than $50k)	77%	2%
	Medium ($50k -<$100k)	75%	5%
	High (more than $100k)	86%	3%
Currently receiving rebate or concession (electricity or gas)	Yes	78%	5%
	No	77%	3%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	85%	5%
	No	76%	4%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	77%	6%
	No	77%	3%
Employment	Working FT / PT / Casual	78%	3%
	Retired	83%	3%
	Other	70%	6%
Solar Panels	Yes	81%	3%
	No	75%	4%
Switched Energy Company or Plan	In the past 12 months	83%	3%
	1 to 5 years ago	84%	5%
	NETT switched (last 5 yrs)	84%	4%
	Have not switched at all	72%	4%
Approached by Energy Company	Yes	86%	4%
	No	73%	5%
Actively Investigated Offers	Yes	82%	4%
	No	77%	4%
Electricity Spend (last quarterly bill)	Low (Less than $300)	82%	4%
	Medium ($300 - $399)	76%	3%
	High (more than $400)	77%	4%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'm concerned if I switch there might be hidden fees and charges (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	67%	13%
Location	Metro	68%	11%
	Regional	65%	17%
Gas	Mains connected	62%	14%
	Not connected	68%	13%
Age Group	18 – 34	64%	15%
	35 – 54	69%	11%
	55 and over	64%	15%
Home Ownership	Renters	69%	14%
	Owners	66%	12%
Household Income	Low (less than $50k)	66%	15%
	Medium ($50k -<$100k)	70%	10%
	High (more than $100k)	65%	16%
Currently receiving rebate or concession (electricity or gas)	Yes	69%	14%
	No	66%	12%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	79%	17%
	No	65%	12%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	78%	13%
	No	64%	13%
Employment	Working FT / PT / Casual	65%	12%
	Retired	66%	17%
	Other	72%	10%
Solar Panels	Yes	65%	15%
	No	67%	12%
Switched Energy Company or Plan	In the past 12 months	65%	13%
	1 to 5 years ago	64%	19%
	NETT switched (last 5 yrs)	64%	17%
	Have not switched at all	69%	9%
Approached by Energy Company	Yes	70%	12%
	No	66%	13%
Actively Investigated Offers	Yes	67%	18%
	No	68%	11%
Electricity Spend (last quarterly bill)	Low (Less than $300)	66%	14%
	Medium ($300 - $399)	74%	14%
	High (more than $400)	67%	13%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

It's too complicated to try and compare the various options and offers available (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	53%	24%
Location	Metro	56%	21%
	Regional	46%	31%
Gas	Mains connected	58%	21%
	Not connected	52%	25%
Age Group	18 – 34	43%	27%
	35 – 54	56%	22%
	55 and over	55%	26%
Home Ownership	Renters	50%	28%
	Owners	55%	23%
Household Income	Low (less than $50k)	41%	32%
	Medium ($50k -<$100k)	59%	23%
	High (more than $100k)	63%	18%
Currently receiving rebate or concession (electricity or gas)	Yes	54%	29%
	No	52%	22%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	68%	21%
	No	50%	25%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	64%	19%
	No	50%	26%
Employment	Working FT / PT / Casual	53%	23%
	Retired	52%	31%
	Other	52%	22%
Solar Panels	Yes	56%	25%
	No	51%	24%
Switched Energy Company or Plan	In the past 12 months	52%	33%
	1 to 5 years ago	54%	26%
	NETT switched (last 5 yrs)	53%	29%
	Have not switched at all	53%	20%
Approached by Energy Company	Yes	55%	23%
	No	53%	25%
Actively Investigated Offers	Yes	53%	33%
	No	54%	21%
Electricity Spend (last quarterly bill)	Low (Less than $300)	46%	29%
	Medium ($300 - $399)	53%	20%
	High (more than $400)	60%	22%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I generally don't trust energy companies that promise a better deal (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	55%	17%
Location	Metro	58%	14%
	Regional	49%	22%
Gas	Mains connected	54%	19%
	Not connected	56%	16%
Age Group	18 – 34	45%	24%
	35 – 54	58%	14%
	55 and over	60%	16%
Home Ownership	Renters	52%	20%
	Owners	57%	15%
Household Income	Low (less than $50k)	55%	19%
	Medium ($50k -<$100k)	53%	16%
	High (more than $100k)	59%	15%
Currently receiving rebate or concession (electricity or gas)	Yes	62%	13%
	No	53%	18%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	66%	14%
	No	54%	17%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	59%	16%
	No	54%	17%
Employment	Working FT / PT / Casual	53%	16%
	Retired	63%	16%
	Other	54%	19%
Solar Panels	Yes	60%	17%
	No	53%	17%
Switched Energy Company or Plan	In the past 12 months	56%	16%
	1 to 5 years ago	55%	15%
	NETT switched (last 5 yrs)	56%	15%
	Have not switched at all	55%	18%
Approached by Energy Company	Yes	66%	15%
	No	52%	19%
Actively Investigated Offers	Yes	63%	16%
	No	54%	17%
Electricity Spend (last quarterly bill)	Low (Less than $300)	51%	22%
	Medium ($300 - $399)	65%	11%
	High (more than $400)	57%	16%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'd prefer to try and save energy to reduce my bill than to seek out a better deal (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	51%	20%
Location	Metro	52%	18%
	Regional	50%	26%
Gas	Mains connected	53%	17%
	Not connected	51%	21%
Age Group	18 – 34	53%	22%
	35 – 54	54%	17%
	55 and over	43%	28%
Home Ownership	Renters	44%	21%
	Owners	55%	21%
Household Income	Low (less than $50k)	48%	21%
	Medium ($50k -<$100k)	52%	22%
	High (more than $100k)	58%	20%
Currently receiving rebate or concession (electricity or gas)	Yes	47%	26%
	No	53%	18%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	55%	20%
	No	51%	21%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	53%	19%
	No	51%	21%
Employment	Working FT / PT / Casual	55%	19%
	Retired	46%	29%
	Other	44%	16%
Solar Panels	Yes	54%	21%
	No	50%	20%
Switched Energy Company or Plan	In the past 12 months	50%	29%
	1 to 5 years ago	44%	25%
	NETT switched (last 5 yrs)	46%	27%
	Have not switched at all	56%	15%
Approached by Energy Company	Yes	54%	24%
	No	53%	20%
Actively Investigated Offers	Yes	56%	24%
	No	51%	20%
Electricity Spend (last quarterly bill)	Low (Less than $300)	50%	24%
	Medium ($300 - $399)	53%	19%
	High (more than $400)	54%	20%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

The amount I could save is not worth the time and effort (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	40%	31%
Location	Metro	43%	28%
	Regional	32%	38%
Gas	Mains connected	43%	32%
	Not connected	39%	32%
Age Group	18 – 34	32%	35%
	35 – 54	42%	30%
	55 and over	43%	29%
Home Ownership	Renters	33%	35%
	Owners	44%	29%
Household Income	Low (less than $50k)	39%	30%
	Medium ($50k -<$100k)	39%	32%
	High (more than $100k)	47%	30%
Currently receiving rebate or concession (electricity or gas)	Yes	49%	25%
	No	36%	34%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	51%	34%
	No	38%	31%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	43%	34%
	No	39%	30%
Employment	Working FT / PT / Casual	38%	32%
	Retired	47%	32%
	Other	39%	29%
Solar Panels	Yes	52%	26%
	No	34%	34%
Switched Energy Company or Plan	In the past 12 months	33%	48%
	1 to 5 years ago	33%	37%
	NETT switched (last 5 yrs)	33%	41%
	Have not switched at all	46%	22%
Approached by Energy Company	Yes	42%	35%
	No	41%	31%
Actively Investigated Offers	Yes	42%	41%
	No	40%	28%
Electricity Spend (last quarterly bill)	Low (Less than $300)	38%	37%
	Medium ($300 - $399)	44%	25%
	High (more than $400)	42%	31%

Base: All Respondents (n=402)

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I can't be bothered looking for a better deal (NSW)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	39%	32%
Location	Metro	44%	31%
	Regional	28%	35%
Gas	Mains connected	49%	25%
	Not connected	37%	34%
Age Group	18 – 34	47%	28%
	35 – 54	39%	32%
	55 and over	31%	36%
Home Ownership	Renters	35%	37%
	Owners	41%	30%
Household Income	Low (less than $50k)	34%	33%
	Medium ($50k -<$100k)	39%	37%
	High (more than $100k)	52%	23%
Currently receiving rebate or concession (electricity or gas)	Yes	35%	31%
	No	41%	33%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	41%	39%
	No	39%	31%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	42%	36%
	No	38%	31%
Employment	Working FT / PT / Casual	41%	32%
	Retired	30%	42%
	Other	41%	25%
Solar Panels	Yes	39%	29%
	No	39%	34%
Switched Energy Company or Plan	In the past 12 months	36%	50%
	1 to 5 years ago	29%	38%
	NETT switched (last 5 yrs)	32%	43%
	Have not switched at all	46%	22%
Approached by Energy Company	Yes	45%	35%
	No	38%	33%
Actively Investigated Offers	Yes	31%	52%
	No	43%	25%
Electricity Spend (last quarterly bill)	Low (Less than $300)	34%	39%
	Medium ($300 - $399)	45%	34%
	High (more than $400)	41%	31%

Base: All Respondents (n=402)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (NSW)	Sub-group	Residents 2015
Total	All residents	48%
Location	Metro	50%
	Regional	45%
Gas	Mains connected	67%
	Not connected	44%
Age Group	18 – 34	54%
	35 – 54	44%
	55 and over	51%
Home Ownership	Renters	49%
	Owners	48%
Household Income	Low (less than $50k)	42%
	Medium ($50k -<$100k)	58%
	High (more than $100k)	47%
Currently receiving rebate or concession (electricity or gas)	Yes	58%
	No	44%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%
	No	46%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	51%
	No	47%
Employment	Working FT / PT / Casual	48%
	Retired	46%
	Other	50%
Solar Panels	Yes	56%
	No	44%
Switched Energy Company or Plan	In the past 12 months	61%
	1 to 5 years ago	42%
	NETT switched (last 5 yrs)	50%
	Have not switched at all	47%
Approached by Energy Company	Yes	55%
	No	47%
Actively Investigated Offers	Yes	52%
	No	47%
Electricity Spend (last quarterly bill)	Low (Less than $300)	49%
	Medium ($300 - $399)	52%
	High (more than $400)	49%

Base: All Respondents (n=402)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Electricity Companies

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (NSW)	Sub-group	Residents 2015
Total	All residents	63%
Location	Metro	63%
	Regional	63%
Gas	Mains connected	66%
	Not connected	63%
Age Group	18 – 34	65%
	35 – 54	59%
	55 and over	69%
Home Ownership	Renters	61%
	Owners	64%
Household Income	Low (less than $50k)	68%
	Medium ($50k -<$100k)	66%
	High (more than $100k)	58%
Currently receiving rebate or concession (electricity or gas)	Yes	78%
	No	56%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	72%
	No	61%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	59%
	No	63%
Employment	Working FT / PT / Casual	61%
	Retired	72%
	Other	58%
Solar Panels	Yes	72%
	No	58%
Switched Energy Company or Plan	In the past 12 months	70%
	1 to 5 years ago	56%
	NETT switched (last 5 yrs)	62%
	Have not switched at all	63%
Approached by Energy Company	Yes	70%
	No	61%
Actively Investigated Offers	Yes	63%
	No	64%
Electricity Spend (last quarterly bill)	Low (Less than $300)	69%
	Medium ($300 - $399)	70%
	High (more than $400)	56%

Base: All Respondents (n=402)
Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	61%
Location	Metro	60%
	Regional	65%
Gas	Mains connected	75%
	Not connected	59%
Age Group	18 – 34	63%
	35 – 54	58%
	55 and over	67%
Home Ownership	Renters	60%
	Owners	63%
Household Income	Low (less than $50k)	62%
	Medium ($50k -<$100k)	68%
	High (more than $100k)	56%
Currently receiving rebate or concession (electricity or gas)	Yes	71%
	No	57%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	76%
	No	59%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	61%
	No	61%
Employment	Working FT / PT / Casual	59%
	Retired	68%
	Other	62%
Solar Panels	Yes	63%
	No	61%
Switched Energy Company or Plan	In the past 12 months	66%
	1 to 5 years ago	55%
	NETT switched (last 5 yrs)	59%
	Have not switched at all	63%
Approached by Energy Company	Yes	68%
	No	59%
Actively Investigated Offers	Yes	65%
	No	61%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%
	Medium ($300 - $399)	68%
	High (more than $400)	58%

Base: All Respondents (n=402)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	47%
Location	Metro	48%
	Regional	47%
Gas	Mains connected	62%
	Not connected	45%
Age Group	18 – 34	55%
	35 – 54	41%
	55 and over	54%
Home Ownership	Renters	44%
	Owners	49%
Household Income	Low (less than $50k)	47%
	Medium ($50k -<$100k)	53%
	High (more than $100k)	46%
Currently receiving rebate or concession (electricity or gas)	Yes	56%
	No	44%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	63%
	No	45%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	45%
	No	48%
Employment	Working FT / PT / Casual	46%
	Retired	52%
	Other	48%
Solar Panels	Yes	55%
	No	44%
Switched Energy Company or Plan	In the past 12 months	56%
	1 to 5 years ago	43%
	NETT switched (last 5 yrs)	48%
	Have not switched at all	47%
Approached by Energy Company	Yes	51%
	No	47%
Actively Investigated Offers	Yes	57%
	No	45%
Electricity Spend (last quarterly bill)	Low (Less than $300)	54%
	Medium ($300 - $399)	52%
	High (more than $400)	40%

Base: All Respondents (n=402)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (Southeast Queensland) (% Rating 7-10) (NSW)	Sub-group	Residents 2015
Total	All residents	50%
Location	Metro	51%
	Regional	50%
Gas	Mains connected	69%
	Not connected	47%
Age Group	18 – 34	57%
	35 – 54	47%
	55 and over	50%
Home Ownership	Renters	52%
	Owners	49%
Household Income	Low (less than $50k)	46%
	Medium ($50k -<$100k)	56%
	High (more than $100k)	53%
Currently receiving rebate or concession (electricity or gas)	Yes	56%
	No	48%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	55%
	No	50%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	46%
	No	51%
Employment	Working FT / PT / Casual	52%
	Retired	45%
	Other	50%
Solar Panels	Yes	57%
	No	47%
Switched Energy Company or Plan	In the past 12 months	63%
	1 to 5 years ago	47%
	NETT switched (last 5 yrs)	53%
	Have not switched at all	48%
Approached by Energy Company	Yes	59%
	No	48%
Actively Investigated Offers	Yes	65%
	No	45%
Electricity Spend (last quarterly bill)	Low (Less than $300)	52%
	Medium ($300 - $399)	57%
	High (more than $400)	47%

Base: All Respondents (n=402)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident

Appendix Eight: Australian Capital Territory Sub-group Tables

Customer Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% True) (ACT)	Sub-group	Residents 2015
Total	All residents	72%
Location	Metro	72%
	Regional	N/A
Gas	Mains connected	75%
	Not connected	66%
Age Group	18 – 34	62%
	35 – 54	75%
	55 and over	71%
Home Ownership	Renters	64%
	Owners	74%
Household Income	Low (less than $50k)	63%
	Medium ($50k -<$100k)	70%
	High (more than $100k)	79%
Currently receiving rebate or concession (electricity or gas)	Yes	70%
	No	72%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	52%
	No	75%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	70%
	No	72%
Employment	Working FT / PT / Casual	77%
	Retired	67%
	Other	59%
Solar Panels	Yes	82%
	No	70%
Switched Energy Company or Plan	In the past 12 months	61%
	1 to 5 years ago	91%
	NETT switched (last 5 yrs)	79%
	Have not switched at all	69%
Approached by Energy Company	Yes	82%
	No	67%
Actively Investigated Offers	Yes	81%
	No	70%
Electricity Spend (last quarterly bill)	Low (Less than $300)	76%
	Medium ($300 - $399)	70%
	High (more than $400)	76%
Gas Spend (last quarterly bill)	Low (Less than $200)	71%
	Medium ($200-$299)	86%
	High (more than $300)	76%

Base: All Respondents (n=200)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose Gas Company (% True) (ACT)	Sub-group	Residents 2015
Total	All residents	54%
Location	Metro	54%
	Regional	N/A
Gas	Mains connected	54%
	Not connected	N/A
Age Group	18 – 34	58%
	35 – 54	56%
	55 and over	49%
Home Ownership	Renters	60%
	Owners	52%
Household Income	Low (less than $50k)	41%
	Medium ($50k -<$100k)	61%
	High (more than $100k)	55%
Currently receiving rebate or concession (electricity or gas)	Yes	56%
	No	54%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	43%
	No	56%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	69%
	No	51%
Employment	Working FT / PT / Casual	57%
	Retired	54%
	Other	47%
Solar Panels	Yes	57%
	No	54%
Switched Energy Company or Plan	In the past 12 months	58%
	1 to 5 years ago	78%
	NETT switched (last 5 yrs)	71%
	Have not switched at all	48%
Approached by Energy Company	Yes	56%
	No	52%
Actively Investigated Offers	Yes	75%
	No	49%
Electricity Spend (last quarterly bill)	Low (Less than $300)	51%
	Medium ($300 - $399)	47%
	High (more than $400)	63%
Gas Spend (last quarterly bill)	Low (Less than $200)	43%
	Medium ($200-$299)	61%
	High (more than $300)	67%

Base: Respondents with mains connected gas (n=126)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [if ACT] or territory can choose their gas company

Awareness of Being Able to Choose from Different Energy Plans (% True) (ACT)	Sub-group	Electricity 2015	Gas 2015
Total	All residents	65%	50%
Location	Metro	65%	50%
	Regional	N/A	N/A
Gas	Mains connected	70%	50%
	Not connected	58%	N/A
Age Group	18 – 34	48%	53%
	35 – 54	72%	48%
	55 and over	65%	51%
Home Ownership	Renters	56%	52%
	Owners	68%	49%
Household Income	Low (less than $50k)	56%	42%
	Medium ($50k -<$100k)	60%	57%
	High (more than $100k)	76%	56%
Currently receiving rebate or concession (electricity or gas)	Yes	64%	56%
	No	66%	49%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	49%	46%
	No	68%	51%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	61%	63%
	No	66%	48%
Employment	Working FT / PT / Casual	68%	53%
	Retired	66%	45%
	Other	57%	44%
Solar Panels	Yes	75%	52%
	No	63%	49%
Switched Energy Company or Plan	In the past 12 months	67%	68%
	1 to 5 years ago	73%	50%
	NETT switched (last 5 yrs)	71%	57%
	Have not switched at all	63%	47%
Approached by Energy Company	Yes	75%	54%
	No	62%	49%
Actively Investigated Offers	Yes	68%	67%
	No	65%	46%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%	57%
	Medium ($300 - $399)	62%	37%
	High (more than $400)	70%	47%
Gas Spend (last quarterly bill)	Low (Less than $200)	62%	44%
	Medium ($200-$299)	69%	47%
	High (more than $300)	80%	66%

Base: All Respondents (n=200) / Base: Respondents with mains connected gas (n=126)
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms / d) Consumers in your state [territory] can choose from a range of different types of gas plans, price

structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (ACT)	Sub-group	Residents 2015
Total	All residents	38%
Location	Metro	38%
	Regional	N/A
Gas	Mains connected	35%
	Not connected	41%
Age Group	18 – 34	38%
	35 – 54	37%
	55 and over	39%
Home Ownership	Renters	35%
	Owners	39%
Household Income	Low (less than $50k)	48%
	Medium ($50k -<$100k)	34%
	High (more than $100k)	38%
Currently receiving rebate or concession (electricity or gas)	Yes	59%
	No	32%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	32%
	No	39%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	31%
	No	39%
Employment	Working FT / PT / Casual	36%
	Retired	42%
	Other	36%
Solar Panels	Yes	57%
	No	33%
Switched Energy Company or Plan	In the past 12 months	53%
	1 to 5 years ago	49%
	NETT switched (last 5 yrs)	51%
	Have not switched at all	32%
Approached by Energy Company	Yes	44%
	No	36%
Actively Investigated Offers	Yes	47%
	No	35%
Electricity Spend (last quarterly bill)	Low (Less than $300)	44%
	Medium ($300 - $399)	44%
	High (more than $400)	26%
Gas Spend (last quarterly bill)	Low (Less than $200)	41%
	Medium ($200-$299)	33%
	High (more than $300)	34%

Base: All Respondents (n=200)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

Market Participation

Incidence of Switching or Investigating Offers

Switched Energy Company or Plan (% Yes) (ACT)	Sub-group	Past 5 Years	Past 12 Months	Not Switched
Total	All residents	29%	12%	71%
Location	Metro	29%	12%	71%
	Regional	N/A	N/A	N/A
Gas	Mains connected	29%	11%	71%
	Not connected	30%	14%	70%
Age Group	18 – 34	34%	24%	66%
	35 – 54	31%	11%	69%
	55 and over	21%	6%	79%
Home Ownership	Renters	36%	17%	64%
	Owners	27%	10%	73%
Household Income	Low (less than $50k)	28%	17%	72%
	Medium ($50k -<$100k)	29%	14%	71%
	High (more than $100k)	31%	8%	69%
Currently receiving rebate or concession (electricity or gas)	Yes	27%	14%	73%
	No	29%	11%	71%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	28%	10%	72%
	No	29%	12%	71%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	36%	22%	64%
	No	28%	10%	72%
Employment	Working FT / PT / Casual	31%	13%	69%
	Retired	16%	1%	84%
	Other	38%	24%	62%
Solar Panels	Yes	40%	18%	60%
	No	27%	11%	73%
Approached by Energy Company	Yes	43%	22%	57%
	No	24%	9%	76%
Actively Investigated Offers	Yes	57%	38%	43%
	No	22%	6%	78%
Electricity Spend (last quarterly bill)	Low (Less than $300)	27%	11%	73%
	Medium ($300 - $399)	30%	10%	70%
	High (more than $400)	35%	18%	65%
Gas Spend (last quarterly bill)	Low (Less than $200)	30%	15%	70%
	Medium ($200-$299)	24%	0%	76%
	High (more than $300)	26%	14%	74%

Base: All Respondents (n=200)
Q17. A) In the past 5 years, how many times have you changed the following?
Q17. B) And was that in the last 12 months? IF SWITCHED MORE THAN ONCE: And of those [INSERT from Q17A] times how many were in the past 12 months?

Approached by an Energy Company in Past 12 Months (% Yes) (ACT)	Sub-group	Residents 2015
Total	All residents	29%
Location	Metro	29%
	Regional	N/A
Gas	Mains connected	32%
	Not connected	22%
Age Group	18 – 34	24%
	35 – 54	31%
	55 and over	29%
Home Ownership	Renters	33%
	Owners	28%
Household Income	Low (less than $50k)	41%
	Medium ($50k -<$100k)	30%
	High (more than $100k)	21%
Currently receiving rebate or concession (electricity or gas)	Yes	39%
	No	26%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	22%
	No	30%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	26%
	No	30%
Employment	Working FT / PT / Casual	32%
	Retired	29%
	Other	17%
Solar Panels	Yes	24%
	No	30%
Switched Energy Company or Plan	In the past 12 months	53%
	1 to 5 years ago	35%
	NETT switched (last 5 yrs)	43%
	Have not switched at all	23%
Approached by Energy Company	Yes	100%
	No	0%
Actively Investigated Offers	Yes	46%
	No	25%
Electricity Spend (last quarterly bill)	Low (Less than $300)	29%
	Medium ($300 - $399)	38%
	High (more than $400)	32%
Gas Spend (last quarterly bill)	Low (Less than $200)	36%
	Medium ($200-$299)	22%
	High (more than $300)	39%

Base: All Respondents (n=200)
Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Actively Investigated Offers or Options (% Yes) (ACT)	Sub-group	Residents 2015
Total	All residents	19%
Location	Metro	19%
	Regional	N/A
Gas	Mains connected	19%
	Not connected	16%
Age Group	18 – 34	28%
	35 – 54	18%
	55 and over	15%
Home Ownership	Renters	22%
	Owners	18%
Household Income	Low (less than $50k)	20%
	Medium ($50k -<$100k)	22%
	High (more than $100k)	16%
Currently receiving rebate or concession (electricity or gas)	Yes	20%
	No	19%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	25%
	No	18%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	36%
	No	16%
Employment	Working FT / PT / Casual	21%
	Retired	13%
	Other	19%
Solar Panels	Yes	28%
	No	17%
Switched Energy Company or Plan	In the past 12 months	59%
	1 to 5 years ago	22%
	NETT switched (last 5 yrs)	37%
	Have not switched at all	11%
Approached by Energy Company	Yes	30%
	No	16%
Actively Investigated Offers	Yes	100%
	No	N/A
Electricity Spend (last quarterly bill)	Low (Less than $300)	21%
	Medium ($300 - $399)	19%
	High (more than $400)	17%
Gas Spend (last quarterly bill)	Low (Less than $200)	24%
	Medium ($200-$299)	14%
	High (more than $300)	20%

Base: All Respondents (n=200)
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?

Switching Intentions and Attitudes

Interest in Looking for a Better Deal (ACT)	Sub-group	Interested / Currently Looking	Not Interested in Switching
Total	All residents	63%	31%
Location	Metro	63%	31%
	Regional	N/A	N/A
Gas	Mains connected	70%	27%
	Not connected	49%	39%
Age Group	18 – 34	69%	24%
	35 – 54	65%	28%
	55 and over	54%	41%
Home Ownership	Renters	72%	23%
	Owners	60%	33%
Household Income	Low (less than $50k)	53%	41%
	Medium ($50k -<$100k)	70%	24%
	High (more than $100k)	62%	32%
Currently receiving rebate or concession (electricity or gas)	Yes	52%	43%
	No	65%	28%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	77%	21%
	No	60%	33%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	85%	12%
	No	58%	35%
Employment	Working FT / PT / Casual	64%	28%
	Retired	55%	41%
	Other	67%	29%
Solar Panels	Yes	53%	37%
	No	65%	30%
Switched Energy Company or Plan	In the past 12 months	59%	19%
	1 to 5 years ago	71%	26%
	NETT switched (last 5 yrs)	66%	23%
	Have not switched at all	61%	34%
Approached by Energy Company	Yes	64%	29%
	No	62%	32%
Actively Investigated Offers	Yes	72%	11%
	No	60%	36%
Electricity Spend (last quarterly bill)	Low (Less than $300)	54%	37%
	Medium ($300 - $399)	69%	28%
	High (more than $400)	71%	27%
Gas Spend (last quarterly bill)	Low (Less than $200)	70%	24%
	Medium ($200-$299)	65%	35%
	High (more than $300)	71%	29%

Base: All Respondents (n=200)
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

I'd switch if I was not satisfied with my current company (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	77%	7%
Location	Metro	77%	7%
	Regional	N/A	N/A
Gas	Mains connected	75%	9%
	Not connected	79%	3%
Age Group	18 – 34	79%	7%
	35 – 54	77%	7%
	55 and over	76%	6%
Home Ownership	Renters	76%	2%
	Owners	78%	8%
Household Income	Low (less than $50k)	67%	9%
	Medium ($50k -<$100k)	76%	4%
	High (more than $100k)	85%	8%
Currently receiving rebate or concession (electricity or gas)	Yes	67%	3%
	No	80%	8%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	58%	6%
	No	80%	7%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	63%	8%
	No	79%	7%
Employment	Working FT / PT / Casual	79%	5%
	Retired	76%	6%
	Other	71%	14%
Solar Panels	Yes	85%	7%
	No	75%	7%
Switched Energy Company or Plan	In the past 12 months	67%	11%
	1 to 5 years ago	86%	0%
	NETT switched (last 5 yrs)	78%	5%
	Have not switched at all	76%	8%
Approached by Energy Company	Yes	83%	2%
	No	71%	10%
Actively Investigated Offers	Yes	71%	7%
	No	78%	7%
Electricity Spend (last quarterly bill)	Low (Less than $300)	79%	7%
	Medium ($300 - $399)	82%	6%
	High (more than $400)	69%	9%
Gas Spend (last quarterly bill)	Low (Less than $200)	75%	5%
	Medium ($200-$299)	79%	12%
	High (more than $300)	67%	16%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'm concerned if I switch there might be hidden fees and charges (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	71%	9%
Location	Metro	71%	9%
	Regional	N/A	N/A
Gas	Mains connected	73%	9%
	Not connected	70%	9%
Age Group	18 – 34	66%	7%
	35 – 54	73%	10%
	55 and over	71%	7%
Home Ownership	Renters	77%	12%
	Owners	69%	7%
Household Income	Low (less than $50k)	72%	14%
	Medium ($50k -<$100k)	73%	9%
	High (more than $100k)	70%	6%
Currently receiving rebate or concession (electricity or gas)	Yes	72%	13%
	No	71%	8%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	82%	14%
	No	69%	8%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	74%	7%
	No	71%	9%
Employment	Working FT / PT / Casual	76%	9%
	Retired	70%	6%
	Other	58%	11%
Solar Panels	Yes	63%	15%
	No	73%	7%
Switched Energy Company or Plan	In the past 12 months	51%	16%
	1 to 5 years ago	68%	16%
	NETT switched (last 5 yrs)	61%	16%
	Have not switched at all	75%	6%
Approached by Energy Company	Yes	71%	8%
	No	69%	9%
Actively Investigated Offers	Yes	55%	16%
	No	75%	7%
Electricity Spend (last quarterly bill)	Low (Less than $300)	65%	12%
	Medium ($300 - $399)	86%	5%
	High (more than $400)	74%	5%
Gas Spend (last quarterly bill)	Low (Less than $200)	65%	13%
	Medium ($200-$299)	89%	11%
	High (more than $300)	76%	4%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I generally don't trust energy companies that promise a better deal (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	50%	19%
Location	Metro	50%	19%
	Regional	N/A	N/A
Gas	Mains connected	50%	15%
	Not connected	51%	22%
Age Group	18 – 34	38%	14%
	35 – 54	54%	21%
	55 and over	49%	18%
Home Ownership	Renters	44%	19%
	Owners	51%	19%
Household Income	Low (less than $50k)	58%	27%
	Medium ($50k -<$100k)	45%	16%
	High (more than $100k)	53%	17%
Currently receiving rebate or concession (electricity or gas)	Yes	53%	21%
	No	49%	18%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	59%	18%
	No	48%	19%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	49%	28%
	No	50%	17%
Employment	Working FT / PT / Casual	58%	14%
	Retired	38%	23%
	Other	33%	32%
Solar Panels	Yes	45%	17%
	No	51%	19%
Switched Energy Company or Plan	In the past 12 months	41%	14%
	1 to 5 years ago	42%	25%
	NETT switched (last 5 yrs)	41%	20%
	Have not switched at all	53%	18%
Approached by Energy Company	Yes	53%	20%
	No	48%	19%
Actively Investigated Offers	Yes	31%	39%
	No	54%	14%
Electricity Spend (last quarterly bill)	Low (Less than $300)	43%	23%
	Medium ($300 - $399)	52%	21%
	High (more than $400)	61%	11%
Gas Spend (last quarterly bill)	Low (Less than $200)	48%	18%
	Medium ($200-$299)	50%	14%
	High (more than $300)	58%	13%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

It's too complicated to try and compare the various options and offers (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	55%	24%
Location	Metro	55%	24%
	Regional	N/A	N/A
Gas	Mains connected	57%	22%
	Not connected	53%	29%
Age Group	18 – 34	62%	21%
	35 – 54	54%	27%
	55 and over	54%	21%
Home Ownership	Renters	51%	29%
	Owners	57%	22%
Household Income	Low (less than $50k)	50%	27%
	Medium ($50k -<$100k)	55%	24%
	High (more than $100k)	57%	23%
Currently receiving rebate or concession (electricity or gas)	Yes	46%	26%
	No	58%	23%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	61%	26%
	No	54%	24%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	63%	24%
	No	54%	24%
Employment	Working FT / PT / Casual	58%	25%
	Retired	49%	15%
	Other	56%	32%
Solar Panels	Yes	41%	39%
	No	59%	21%
Switched Energy Company or Plan	In the past 12 months	37%	41%
	1 to 5 years ago	42%	43%
	NETT switched (last 5 yrs)	40%	42%
	Have not switched at all	62%	17%
Approached by Energy Company	Yes	49%	23%
	No	55%	25%
Actively Investigated Offers	Yes	44%	37%
	No	58%	21%
Electricity Spend (last quarterly bill)	Low (Less than $300)	44%	34%
	Medium ($300 - $399)	68%	16%
	High (more than $400)	64%	17%
Gas Spend (last quarterly bill)	Low (Less than $200)	56%	20%
	Medium ($200-$299)	59%	24%
	High (more than $300)	58%	23%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I'd prefer to try and save energy to reduce my bill than to seek out a better deal (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	53%	21%
Location	Metro	53%	21%
	Regional	N/A	N/A
Gas	Mains connected	51%	23%
	Not connected	60%	17%
Age Group	18 – 34	45%	28%
	35 – 54	58%	15%
	55 and over	50%	29%
Home Ownership	Renters	52%	26%
	Owners	54%	19%
Household Income	Low (less than $50k)	54%	17%
	Medium ($50k -<$100k)	56%	29%
	High (more than $100k)	53%	17%
Currently receiving rebate or concession (electricity or gas)	Yes	58%	15%
	No	52%	23%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	55%	21%
	No	53%	21%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	65%	25%
	No	51%	21%
Employment	Working FT / PT / Casual	53%	23%
	Retired	42%	24%
	Other	69%	11%
Solar Panels	Yes	46%	29%
	No	55%	20%
Switched Energy Company or Plan	In the past 12 months	45%	22%
	1 to 5 years ago	55%	33%
	NETT switched (last 5 yrs)	51%	28%
	Have not switched at all	54%	19%
Approached by Energy Company	Yes	57%	20%
	No	52%	23%
Actively Investigated Offers	Yes	48%	27%
	No	55%	20%
Electricity Spend (last quarterly bill)	Low (Less than $300)	46%	23%
	Medium ($300 - $399)	69%	16%
	High (more than $400)	53%	23%
Gas Spend (last quarterly bill)	Low (Less than $200)	47%	24%
	Medium ($200-$299)	52%	26%
	High (more than $300)	48%	26%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

I can't be bothered looking for a better deal (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	43%	30%
Location	Metro	43%	30%
	Regional	N/A	N/A
Gas	Mains connected	45%	30%
	Not connected	41%	28%
Age Group	18 – 34	38%	34%
	35 – 54	46%	28%
	55 and over	40%	31%
Home Ownership	Renters	38%	27%
	Owners	45%	31%
Household Income	Low (less than $50k)	47%	17%
	Medium ($50k -<$100k)	31%	35%
	High (more than $100k)	52%	31%
Currently receiving rebate or concession (electricity or gas)	Yes	44%	21%
	No	42%	32%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	47%	21%
	No	42%	32%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	48%	32%
	No	41%	30%
Employment	Working FT / PT / Casual	45%	30%
	Retired	37%	31%
	Other	42%	26%
Solar Panels	Yes	30%	45%
	No	45%	27%
Switched Energy Company or Plan	In the past 12 months	24%	46%
	1 to 5 years ago	34%	45%
	NETT switched (last 5 yrs)	30%	46%
	Have not switched at all	48%	24%
Approached by Energy Company	Yes	35%	28%
	No	45%	34%
Actively Investigated Offers	Yes	17%	54%
	No	49%	25%
Electricity Spend (last quarterly bill)	Low (Less than $300)	36%	35%
	Medium ($300 - $399)	58%	12%
	High (more than $400)	45%	34%
Gas Spend (last quarterly bill)	Low (Less than $200)	42%	29%
	Medium ($200-$299)	47%	24%
	High (more than $300)	45%	33%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

The amount I could save is not worth the time and effort (ACT)	Sub-group	Strongly / Somewhat Agree	Strongly / Somewhat Disagree
Total	All residents	52%	25%
Location	Metro	52%	25%
	Regional	N/A	N/A
Gas	Mains connected	55%	22%
	Not connected	51%	30%
Age Group	18 – 34	41%	28%
	35 – 54	58%	24%
	55 and over	50%	27%
Home Ownership	Renters	45%	35%
	Owners	55%	22%
Household Income	Low (less than $50k)	43%	31%
	Medium ($50k -<$100k)	47%	37%
	High (more than $100k)	58%	13%
Currently receiving rebate or concession (electricity or gas)	Yes	51%	23%
	No	53%	26%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	50%	18%
	No	53%	27%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	51%	37%
	No	53%	23%
Employment	Working FT / PT / Casual	58%	24%
	Retired	48%	27%
	Other	38%	29%
Solar Panels	Yes	35%	33%
	No	56%	24%
Switched Energy Company or Plan	In the past 12 months	32%	52%
	1 to 5 years ago	42%	31%
	NETT switched (last 5 yrs)	38%	40%
	Have not switched at all	58%	20%
Approached by Energy Company	Yes	57%	25%
	No	48%	25%
Actively Investigated Offers	Yes	42%	34%
	No	55%	23%
Electricity Spend (last quarterly bill)	Low (Less than $300)	44%	32%
	Medium ($300 - $399)	63%	16%
	High (more than $400)	57%	24%
Gas Spend (last quarterly bill)	Low (Less than $200)	42%	27%
	Medium ($200-$299)	59%	24%
	High (more than $300)	63%	19%

Base: All Respondents (n=200)
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly…

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (ACT)	Sub-group	Residents 2015
Total	All residents	34%
Location	Metro	34%
	Regional	N/A
Gas	Mains connected	32%
	Not connected	39%
Age Group	18 – 34	38%
	35 – 54	28%
	55 and over	42%
Home Ownership	Renters	35%
	Owners	33%
Household Income	Low (less than $50k)	38%
	Medium ($50k -<$100k)	34%
	High (more than $100k)	31%
Currently receiving rebate or concession (electricity or gas)	Yes	45%
	No	31%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	37%
	No	33%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	36%
	No	33%
Employment	Working FT / PT / Casual	30%
	Retired	42%
	Other	35%
Solar Panels	Yes	53%
	No	29%
Switched Energy Company or Plan	In the past 12 months	42%
	1 to 5 years ago	40%
	NETT switched (last 5 yrs)	41%
	Have not switched at all	31%
Approached by Energy Company	Yes	33%
	No	35%
Actively Investigated Offers	Yes	41%
	No	32%
Electricity Spend (last quarterly bill)	Low (Less than $300)	32%
	Medium ($300 - $399)	34%
	High (more than $400)	37%
Gas Spend (last quarterly bill)	Low (Less than $200)	39%
	Medium ($200-$299)	20%
	High (more than $300)	31%

Base: All Respondents (n=200)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Electricity Companies

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (ACT)	Sub-group	Residents 2015
Total	All residents	67%
Location	Metro	67%
	Regional	N/A
Gas	Mains connected	68%
	Not connected	66%
Age Group	18 – 34	69%
	35 – 54	64%
	55 and over	72%
Home Ownership	Renters	72%
	Owners	66%
Household Income	Low (less than $50k)	79%
	Medium ($50k -<$100k)	65%
	High (more than $100k)	65%
Currently receiving rebate or concession (electricity or gas)	Yes	79%
	No	64%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	70%
	No	67%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	70%
	No	67%
Employment	Working FT / PT / Casual	60%
	Retired	73%
	Other	85%
Solar Panels	Yes	87%
	No	63%
Switched Energy Company or Plan	In the past 12 months	64%
	1 to 5 years ago	78%
	NETT switched (last 5 yrs)	72%
	Have not switched at all	65%
Approached by Energy Company	Yes	69%
	No	69%
Actively Investigated Offers	Yes	67%
	No	68%
Electricity Spend (last quarterly bill)	Low (Less than $300)	70%
	Medium ($300 - $399)	70%
	High (more than $400)	67%
Gas Spend (last quarterly bill)	Low (Less than $200)	72%
	Medium ($200-$299)	74%
	High (more than $300)	69%

Base: All Respondents (n=200)
Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (ACT)	Sub-group	Residents 2015
Total	All residents	64%
Location	Metro	64%
	Regional	N/A
Gas	Mains connected	61%
	Not connected	70%
Age Group	18 – 34	62%
	35 – 54	60%
	55 and over	72%
Home Ownership	Renters	67%
	Owners	64%
Household Income	Low (less than $50k)	65%
	Medium ($50k -<$100k)	64%
	High (more than $100k)	65%
Currently receiving rebate or concession (electricity or gas)	Yes	81%
	No	60%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	64%
	No	64%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	58%
	No	65%
Employment	Working FT / PT / Casual	63%
	Retired	68%
	Other	65%
Solar Panels	Yes	89%
	No	59%
Switched Energy Company or Plan	In the past 12 months	78%
	1 to 5 years ago	74%
	NETT switched (last 5 yrs)	76%
	Have not switched at all	59%
Approached by Energy Company	Yes	72%
	No	62%
Actively Investigated Offers	Yes	72%
	No	62%
Electricity Spend (last quarterly bill)	Low (Less than $300)	67%
	Medium ($300 - $399)	76%
	High (more than $400)	54%
Gas Spend (last quarterly bill)	Low (Less than $200)	65%
	Medium ($200-$299)	64%
	High (more than $300)	58%

Base: All Respondents (n=200)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (ACT)	Sub-group	Residents 2015
Total	All residents	45%
Location	Metro	45%
	Regional	N/A
Gas	Mains connected	46%
	Not connected	43%
Age Group	18 – 34	48%
	35 – 54	40%
	55 and over	50%
Home Ownership	Renters	45%
	Owners	45%
Household Income	Low (less than $50k)	50%
	Medium ($50k -<$100k)	46%
	High (more than $100k)	42%
Currently receiving rebate or concession (electricity or gas)	Yes	56%
	No	42%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	32%
	No	47%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	31%
	No	47%
Employment	Working FT / PT / Casual	43%
	Retired	54%
	Other	40%
Solar Panels	Yes	72%
	No	39%
Switched Energy Company or Plan	In the past 12 months	61%
	1 to 5 years ago	53%
	NETT switched (last 5 yrs)	56%
	Have not switched at all	40%
Approached by Energy Company	Yes	53%
	No	43%
Actively Investigated Offers	Yes	52%
	No	43%
Electricity Spend (last quarterly bill)	Low (Less than $300)	53%
	Medium ($300 - $399)	51%
	High (more than $400)	34%
Gas Spend (last quarterly bill)	Low (Less than $200)	57%
	Medium ($200-$299)	37%
	High (more than $300)	41%

Base: All Respondents (n=200)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (% Rating 7-10) (ACT)	Sub-group	Residents 2015
Total	All residents	38%
Location	Metro	38%
	Regional	N/A
Gas	Mains connected	35%
	Not connected	42%
Age Group	18 – 34	41%
	35 – 54	38%
	55 and over	36%
Home Ownership	Renters	34%
	Owners	40%
Household Income	Low (less than $50k)	33%
	Medium ($50k -<$100k)	39%
	High (more than $100k)	39%
Currently receiving rebate or concession (electricity or gas)	Yes	42%
	No	37%
Has special payment arrangement as a result of hardship (electricity or gas)	Yes	25%
	No	40%
Currently experiencing financial difficulty paying bill (electricity or gas)	Yes	26%
	No	40%
Employment	Working FT / PT / Casual	41%
	Retired	36%
	Other	28%
Solar Panels	Yes	60%
	No	33%
Switched Energy Company or Plan	In the past 12 months	59%
	1 to 5 years ago	52%
	NETT switched (last 5 yrs)	55%
	Have not switched at all	31%
Approached by Energy Company	Yes	43%
	No	38%
Actively Investigated Offers	Yes	58%
	No	33%
Electricity Spend (last quarterly bill)	Low (Less than $300)	44%
	Medium ($300 - $399)	44%
	High (more than $400)	24%
Gas Spend (last quarterly bill)	Low (Less than $200)	42%
	Medium ($200-$299)	34%
	High (more than $300)	21%

Base: All Respondents (n=200)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

Appendix Nine: Tasmania Sub-group Tables

Customer Awareness & Understanding

Awareness

Awareness of Being Able to Choose Electricity Company (% Yes) (TAS)	Sub-group	Residents 2015
Total	All residents	16%
Location	Metro	24%
	Regional	10%
Age Group	18 – 34	33%
	35 – 54	14%
	55 and over	10%
Home Ownership	Renters	25%
	Owners	13%
Employment	Working FT / PT / Casual	19%
	Retired	7%
	Other	18%

Base: All Respondents (n=200)
Q13. Please tell me whether you think the following statements are True or False. Consumers in your state [territory] can choose their electricity company

Awareness of Being Able to Choose from Different Electricity Plans (% Yes) (TAS)	Sub-group	Residents 2015
Total	All residents	16%
Location	Metro	22%
	Regional	11%
Age Group	18 – 34	33%
	35 – 54	11%
	55 and over	14%
Solar Panels	Yes	2%
	No	18%

Base: All Respondents (n=200)
Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state [territory] can choose from a range of different types of electricity plans, price structures, contract lengths and terms / d) Consumers in your state [territory] can choose from a range of different types of gas plans, price structures, contract lengths and terms. NB: Question wording changed in 2015 and so results are not directly comparable with 2014.

Level of Confidence in Choosing the Right Energy Option or Offer (% Rating 7-10) (TAS)	Sub-group	Residents 2015
Total	All residents	28%
Location	Metro	39%
	Regional	20%
Age Group	18 – 34	41%
	35 – 54	19%
	55 and over	36%
Household Income	Low (less than $50k)	22%
	Medium ($50k -<$100k)	40%
	High (more than $100k)	23%
Employment	Working FT / PT / Casual	26%
	Retired	43%
	Other	18%

Base: All Respondents (n=200)
Q46. When it comes to the energy options and offers available in your state [if ACT] or territory, how confident are you that you can choose one that is right for your household? Please use a scale where 0 means you are not at all confident and 10 means you are extremely confident. NB. This question replaced Q11 'And how confident are you that you understand the various options and product offers that are available to energy customers in your state [if ACT] or territory? Please use a scale where 0 is not at all confident, 5 is fairly and 10 is extremely confident?' Results are not comparable to 2014 data.

Consumer Satisfaction with the Market

Satisfaction with Level of Choice

Satisfaction with Level of Market Choice (% Somewhat / Very Satisfied) (TAS)	Sub-group	Residents 2015
Total	All residents	23%
Location	Metro	33%
	Regional	16%
Electricity Spend (last quarterly bill)	Low (Less than $300)	32%
	Medium ($300 - $399)	29%
	High (more than $400)	15%

Base: All Respondents (n=200)
Q16. When it comes to energy companies and energy plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?

Satisfaction with Current Electricity Company (% Somewhat / Very Satisfied) (TAS)	Sub-group	Residents 2015
Total	All residents	60%
Home Ownership	Renters	72%
	Owners	54%
Electricity Spend (last quarterly bill)	Low (Less than $300)	74%
	Medium ($300 - $399)	66%
	High (more than $400)	51%

Base: All Respondents (n=200)

Q2. And how satisfied are you with your current electricity company?

Rating of Overall Quality of Customer Service Provided by Electricity Company (% Rating 7-10) (TAS)	Sub-group	Residents 2015
Total	All residents	61%
Age Group	18 – 34	70%
	35 – 54	54%
	55 and over	67%
Currently receiving rebate or concession (electricity or gas)	Yes	73%
	No	54%
Employment	Working FT / PT / Casual	56%
	Retired	74%
	Other	62%
Electricity Spend (last quarterly bill)	Low (Less than $300)	69%
	Medium ($300 - $399)	76%
	High (more than $400)	52%

Base: All Respondents (n=200)
Q3. How would you rate the overall quality of customer service provided by your electricity company? Please use a scale where 0 means very poor and 10 is excellent. NB: In 2015 the wording was changed slightly to include the word 'customer' and as such, results are not directly comparable with 2014.

Rating of Overall Value for Money Provided by Electricity Company (% Rating 7-10) (TAS)	Sub-group	Residents 2015
Total	All residents	47%
Electricity Spend (last quarterly bill)	Low (Less than $300)	57%
	Medium ($300 - $399)	61%
	High (more than $400)	36%

Base: All Respondents (n=200)
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company?

Information Sources and Gaps

Adequacy of Information

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (% Rating 7-10) (TAS)	Sub-group	Residents 2015
Total	All residents	39%
Location	Metro	51%
	Regional	29%

Base: All Respondents (n=200)
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? Please use a scale where zero means not at all and 10 is extremely confident. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.