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Australian Energy Market Commission (AEMC)

Consumer Research for 2016 Nationwide Review of Competition in Retail Energy Markets

Report | June 2016

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Disclaimer

In preparing this report we have presented and interpreted information that we believe to be relevant for completing the agreed task in a professional manner. It is important to understand that we have sought to ensure the accuracy of all the information incorporated into this report. Our methodology is copyright to Newgate Research, 2015.

This project was conducted in accordance with AS: ISO20252:2012 guidelines, to which Newgate Research is accredited.

Project reference number: NGR 1509005.



Executive Summary

This report sets out the findings of a quantitative market research survey conducted by Newgate Research in December 2015 on behalf of the Australian Energy Market Commission (AEMC). The research was designed to inform the AEMC's 2016 Retail Competition Review, which is the third annual review.

The research was based on a mixed-method telephone and online survey conducted with a sample of n=2,333 residential and n=553 small business energy consumers across all of the National Electricity Market (NEM) jurisdictions – i.e. Queensland, New South Wales (NSW), the Australian Capital Territory (ACT), Victoria, Tasmania and South Australia. Please note, however, that the term "NEM" is used throughout this report excluding Tasmania and the rest of Queensland (ROQ) beyond South East Queensland, as these areas have no or limited choice of energy providers or plans.

This Executive Summary highlights any statistically significant differences in results from the 2014 and 2015 research, along with 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.

Further results across a range of key demographics and other characteristics are provided in the sub-group tables in Appendices Three through Nine of this report. In general, throughout the results there were few differences between consumers in metropolitan and regional areas. It should also be noted that knowledge of choice in the energy market, and engagement levels, were significantly lower in the ACT than in other jurisdictions (excluding Tasmania and the rest of Queensland).

Findings from additional research undertaken as part of this year's review are detailed in separate supplementary reports. Specifically this includes research to understand the experiences and needs of vulnerable consumers¹, and the implications of new and emerging energy technologies and services².

Consumer Activity

Consumer activity was quite steady in 2016 compared with 2015, yet lower than the 2014 benchmark on a number of fronts, including switching energy companies or plans. While direct approaches from energy companies also remains lower than in 2014, the incidence of consumers actively investigating energy market offers themselves has remained stable across all three reviews. There is a growing awareness and use of comparator websites, yet the independent government websites remain barely on the radar of consumers in the NEM.

Most consumers knew they could choose their own energy company and plan, while awareness remained lower in the ACT than in the rest of the NEM

Around nine in ten consumers knew they could choose their own electricity or gas company, while around eight in ten knew they could choose their own plan with the same energy provider. These results are largely consistent with previous years, though awareness of choice in electricity providers decreased among businesses from last year and was back on par with results from the 2014 study.

While results were also largely consistent across jurisdictions, consumers from the ACT continued to exhibit lower levels of awareness. Most consumers from Tasmania were aware of their effective lack of choice, and around half of consumers from the rest of Queensland knew that at least some in their state had choice.

Around three in ten consumers had actively investigated offers or options, with these results having declined over time among small business consumers

Consistent with previous years of the study, around three in ten consumers had actively investigated energy offers or options in the past 12 months, though this has declined over time for small business consumers. Consumers from the ACT were again outliers, with the lowest levels of investigation, although this has been gradually trending up. Among those who had investigated, the majority had

¹ Newgate Research, 2016. *AEMC 2016 Retail Competition Review: Understanding Vulnerable Customer Experiences and Needs.*

² Newgate Research, 2016. *AEMC 2016 Retail Competition Review: New and Emerging Energy Technologies and Services.*

spent no more than two hours doing so (residential consumers: 69%, businesses: 76%). Those spending more time tended to be younger, male, employed and/or urban dwellers.

Among those who had switched energy company or plan in the past five years, around two-thirds of residential consumers and around seven in ten business consumers said it was somewhat or very easy to compare energy offers. Among *business* consumers there was a significant increase in the proportion of who found it easy to compare electricity offers, at 72% in this review, up from 57% in 2015 (the first year the question was asked). Results were similar across most jurisdictions, though nearly a third of residential consumers *in the ACT* found the process fairly or very difficult.

As in 2015, residential consumers who had switched *other* services generally found it easier to compare offers for those services; especially car insurance (with of nett of 83% of switchers rating this fairly or very easy), mobile phone (nett 78%) and home insurance (nett 78%).

Consistent with 2015 results, the internet was the most preferred source of information

All consumers surveyed were asked what would be their most preferred information source if they were looking for information about different energy offers in future, and internet sources again emerged as the most popular. Use and unprompted recall of comparison websites continued to increase, with almost three in ten residential consumers (28%) able to name at least one of these websites. However, *unprompted* recall of the independent government comparison websites remained virtually non-existent, and a total of just 17% of residential consumers surveyed across the NEM recognised the name of the government site in their jurisdiction when prompted.

Switching rates have held ground among residents after the 2015 decline, while a decline is observed this year among small businesses

Around half of all consumers in the NEM reported switching their electricity or gas provider or plan in the past five years, while around a quarter of residential consumers and one-fifth of business consumers had done so *in the past 12 months*. Compared with previous years, overall switching rates have held ground among *residential* consumers after declining from 2014 to 2015, while switching declined among small business consumers this year.

The pattern of residential switching rates in the last 12 months was in line with a stable level of direct approaches from energy companies against 2015, when this measure was first introduced.

The main reason for not switching company or plan was satisfaction with current arrangements

Around two-thirds of consumers *had not investigated energy companies or plans in the past 12 months* (residential: 67%, business: 66%). As in previous waves, these residential consumers were most likely to say they had *not investigated* energy options because they were happy with their current situation (38%), followed by it being too much hassle (13%) and then being too busy or not having enough time (9%). For businesses the top reason was being time-poor (nett 38%), followed by being happy with their current situation (nett 23%).

Of those consumers who had investigated offers and options, one in five residential consumers (20%) and around a quarter of business consumers (24%) did not go on to switch. Of the total, 15% of all residential consumers and 19% of all business consumers had investigated but did not switch.

The top reason for investigating but not switching was being content with their current arrangements (residential: 31%, businesses: 20%). As with switchers, the most common information sources used by these consumers were internet-based searches and price comparison websites, which were also rated the most useful sources.

Price related factors remained the main unprompted reason for switching

The main unprompted reasons for investigating and switching were again price-related. Around seven in ten consumers who had made a switch in the past five years named reasons including wanting a cheaper price, receiving higher-than-expected bills or being offered discounts. Broadly

consistent by jurisdiction, discounts offered and price per kWh were considered the most important prompted factors in consumers' decisions to switch electricity company or plan. Similar responses were observed among consumers who had switched gas provider or plan over the same period.

Consistent with 2015 results, in order to seriously consider switching their electricity provider or plan, residential consumers across all NEM jurisdictions indicated they would need to save an average of \$217 per year on their electricity bill. Reflecting their larger bills, the minimum saving business consumers required on their electricity bills was higher than for residential consumers, averaging \$511 per year – a slight (but not statistically significant) decrease from \$605 in 2015.

Results were similarly stable year-on-year among those with mains connected gas, with residential consumers requiring a minimum average saving of \$177 per year (vs. \$163 in 2015) and business consumers requiring \$325 per year (vs. \$249 in 2015) to seriously consider switching gas provider.

Around half of consumers in the NEM were currently seeking or interested in finding a better deal

All survey participants were asked about their current interest in looking for a better deal. While results cannot be compared directly to the benchmark wave due to a change in the question wording, they were largely consistent with 2015. Around half of those in the NEM jurisdictions with choice were currently seeking or interested in seeking a better deal. Around one in ten had recently switched so were not currently interested, while around a third were not interested in switching at all.

However, there was a significant increase among *business* consumers who reported they were *not* currently interested in switching company or plan (from 26% in 2015 to 35% this review) – perhaps due to improved perceptions of their current retailer, as outlined within Consumer Outcomes below.

The residential consumers who were significantly more likely to say they were *currently looking for a better deal or interested in switching company or plan* were those who: owned their own home, were receiving relatively high energy bills, aged under 35 years and expressed a higher willingness to take risks in life.

Those who were not interested at all were significantly more likely to be from lower socio-economic backgrounds, have smaller energy bills, be more risk-averse and/or not technology-proficient by nature. These results can potentially be used for targeted marketing strategies in future.

Consumer Outcomes

Despite the relative stability of consumer *activity* in the NEM, all indicators of consumer *outcomes* were at least consistent if not improved year-on-year. Indeed the highest levels in three years are observed on most indicators. This includes higher satisfaction levels with consumers' own retailers and with the level of choice in the market, along with value for money and customer service perceptions, and consumer confidence in switching, coupled with less cynicism.

Satisfaction with electricity and gas companies remained strong, with an increase in residential consumers being very satisfied with their electricity company

Broadly consistent across jurisdictions, satisfaction with energy retailers remained strong, with around seven in ten consumers saying they were somewhat or very satisfied with their electricity or gas company. Among *residential* consumers, there was a significant increase in nett satisfaction with their electricity company compared with the 2014 benchmark (from nett 66% in 2014 to 69% in 2015, up to 73% in 2016). Indeed, there was an increase residential consumers indicating they were *very* satisfied with their electricity provider (to 35%, which is significantly higher than 29% in 2014).

Notably, there were no significant differences in satisfaction between those who had switched energy company or plan in the last 12 months and those who had not.

Ratings of customer service from electricity companies have grown to their highest levels in the three years of this study, with around seven in ten residential and business consumers rating their provider's quality of service highly, at 7 or more out of 10 (71% and 68% respectively). Results were similar among residential consumers with mains gas, however slightly lower among business consumers with gas.

Perceptions of value for money from electricity companies were also at their highest levels in three years, with around six in ten consumers rating the value from their provider as 7 or more out of 10. Among gas consumers two-thirds of residents and half of businesses gave value for money ratings of 7 or more, with residential results up from 2015, while business results remained steady over time.

Satisfaction with the level of choice in the energy market has improved across the NEM since the benchmark wave, while consumers in the ACT, Tasmania and rest of Queensland seek more choice

Satisfaction with the level of choice in the energy market has improved across the NEM since the benchmark wave, with nearly two-thirds of all consumers somewhat or very satisfied with their level of choice. This has trended upwards over time among residents (from 51% in 2014 to 64%), and to some degree among businesses, rising to 65% in 2016 after a decrease from 57% in 2014 to 48% in 2015.

Consumers in the ACT, Tasmania and the rest of Queensland were significantly less satisfied with the level of choice in energy companies and plans than those in other parts of the NEM. Indeed, when residential consumers in Tasmania and regional Queensland were asked how important it would be to have a choice in different electricity providers or plans, around six in ten rated this 8 or more out of 10.

The most common reasons for being happy with their decision to switch were price related

In line with 2015 results, around eight in ten consumers who had switched their electricity company or plan in the past five years were happy with their decision to switch (residential: nett 80% strongly / somewhat agree, businesses: 84%). Price-related reasons remained by far the most common reason for them being satisfied (residential: nett 74%, business consumers: nett 67%).

Among *residential* consumers who had switched, a small proportion were unhappy with their decision (nett 5%), with more than half saying this was due to misleading prices.

For the first time, participants were also asked whether they were satisfied with the process involved in switching, and most agreed that they were (nett 78% residential and 79% of businesses).

Significant gains in consumer confidence; both for finding information, and choosing the right plan

In comparison with 2015, consumers were significantly more confident that they could find the right information to choose a suitable energy plan for their business or household (2014 results on this measure are not comparable due to a change in question wording). The proportion of residential consumers who rated their confidence highly (7 or more out of 10) rose from 54% to 63% this year, and among businesses from 46% to 68%. Notably, residential consumers who had used a price comparison website to investigate offers and options were significantly more likely to rate their confidence highly (75% vs. 62% among those who did not use such a website).

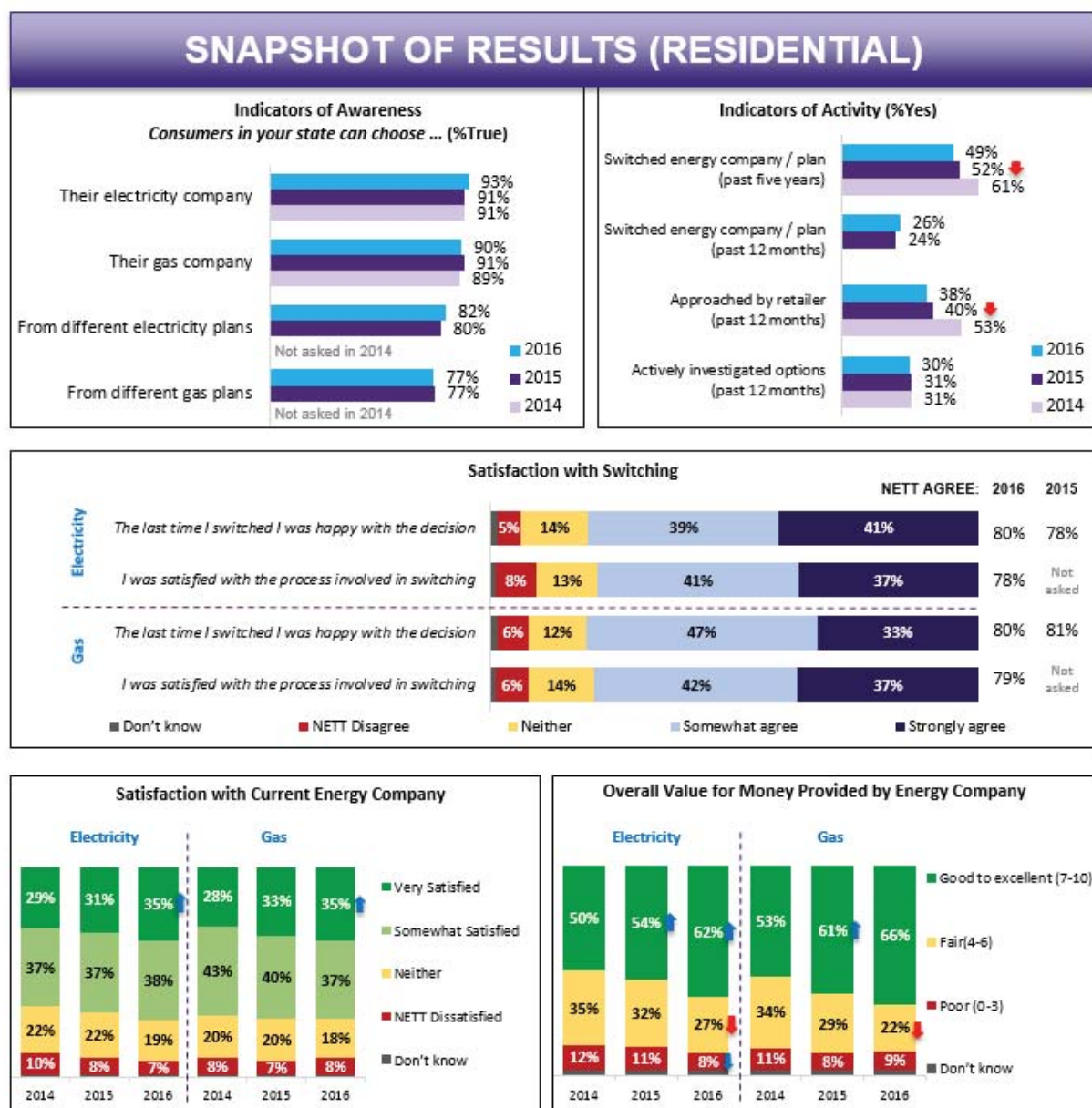
There was a similar increase in consumer confidence in choosing the right energy option for their household or business from when it was first asked in 2015. High confidence ratings rose from 57% to 63% in 2016 among residential consumers, and from 45% to 68% among business consumers.

Consistent with findings across jurisdictions and over time, around eight in ten consumers agreed they would switch if they were not happy with their current energy company (78% of residential consumers, 82% of businesses). Despite a slight decline from the previous year's results, 65% of residential consumers and 61% of business consumers remained concerned about hidden fees and charges if they did switch. This appears to partly explain the recent stability in residential switching

rates, in combination with the sustained lower level of direct approaches from retailers and improved perceptions of their current retailer/s.

Indicators of doubt regarding switching outcomes declined among residential consumers, with significant reductions in the proportions who said: they didn't trust energy companies (from 55% in 2015 to 49%), that comparing options was too hard (from 54% to 49%), and/or that they would prefer to save energy than to seek out a better deal (from 51% to 45%).

The snapshot of key results provided below is for residential consumers across the NEM. These dashboards are also provided throughout the report for each jurisdiction.



Introduction

Background

The AEMC was established in 2005 by the Council of Australian Governments (COAG) as part of new governance arrangements to oversee the nation's main energy markets. Its role is to make rules which govern the electricity and natural gas markets, including the retail elements of those markets. It also supports the development of these markets by providing advice to the Standing Council on Energy and Resources.

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 Energy Market (NEM). The NEM includes Queensland, New South Wales, the Australian Capital Territory, Victoria, South Australia and Tasmania – though for the purposes of this report, all results relating to “the NEM” exclude Tasmania and the rest of Queensland outside of South East Queensland, as consumers in these areas have little if any choice in energy provider or plans and were not included in the 2014 benchmark wave.

Results for the NEM across 2014, 2015 and 2016 are therefore directly comparable as the same jurisdiction are included for each year of the study. The review focuses on small energy customers – both residential and small businesses.

The first review of competition in all markets was completed in August 2014 ('the 2014 review'), with the second wave completed in June 2015 ('the 2015 review'). Newgate Research conducted the market research used to inform both of those reviews.

The AEMC again commissioned Newgate Research to conduct this year's research with residential and small business electricity and mains connected natural gas consumers, to inform its 2016 review.

In addition to the jurisdictions included in previous years, for the first time this study included the 'rest of Queensland' beyond the South East Queensland jurisdiction, where a second electricity retailer entered the market in late 2015 yet currently only has a standing offer.

Findings from supplementary research on understanding the experiences and needs of vulnerable consumers³ and the implications of new and emerging energy technologies and services⁴ are detailed in separate reports.

Research Objectives

The key objective of this research was to assist the AEMC to further understand the experiences of residential and small business consumers in the competitive energy markets – in terms of both activities and outcomes – and explore how this has changed over time.

More specifically, the research aimed to measure and understand consumers' 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;
- Information sources and needs;
- How experiences differ among vulnerable customers and how these consumers can be better supported to participate more effectively in competitive retail energy markets; and

³ Newgate Research, 2016. *AEMC 2016 Retail Competition Review: Understanding Vulnerable Customer Experiences and Needs*.

⁴ Newgate Research, 2016. *AEMC 2016 Retail Competition Review: New and Emerging Energy Technologies and Services*.

- The current and potential impact of new and emerging technologies on competition in retail energy markets.

In preparation for the 2016 review, the AEMC invited a wide range of stakeholders to participate in a two-hour workshop at Newgate's offices on November 9th 2015 to gather feedback on the draft questionnaire. Those who were able to attend were from the Consumer Action Law Centre (CALC), the Public Interest Advocacy Centre (PIAC), St Vincent de Paul Society, Queensland Consumers Association and the South Australian Council of Social Service, with feedback incorporated into the 2016 study where possible.

The focus for the survey was to strike the right balance between obtaining useful and relevant results, ensuring comparability with previous studies, data accuracy, and limiting respondent fatigue by capping the survey length.

The main revisions included questions to better understand consumer attitudes towards adopting new energy technologies and the experiences of vulnerable customers.

The questionnaire was finalised in close consultation with the AEMC. A copy can be found in Appendix One and shows the new questions and those where the wording changed from the 2015 review.

Methodology

This study was carried out in accordance with the quality standard for market and social research ISO20252:2012, to which Newgate is accredited. A quantitative survey was conducted with n=2,333 residential and n=553 small business consumers across seven jurisdictions. The table below shows the sample sizes and associated maximum margins of error (MoE), at the 95% confidence level.

Jurisdiction	TOTAL		Residential		Business	
	n	MoE (+/-)	n	MoE (+/-)	n	MoE (+/-)
Southeast Queensland	525	4.3%	425	4.8%	100	9.8%
Rest of Queensland	200	6.9%	150	8.0%	50	13.9%
New South Wales	580	4.1%	480	4.5%	100	9.8%
Australian Capital Territory	250	6.2%	200	6.9%	50	13.9%
Victoria	579	4.1%	478	4.5%	101	9.8%
Tasmania	251	6.2%	200	6.9%	51	13.7%
South Australia	501	4.4%	400	4.9%	101	9.8%
TOTAL	2,886	1.8%	2,333	2.0%	553	4.2%

Participants were aged 18 or 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. Further, businesses were only asked the series of questions about gas if their quarterly gas bill was below the amount specified here.

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

Survey fieldwork was undertaken by TKW Research Group (formerly Australian Fieldwork Services) using a mixed-mode approach in order to reach a broad range of consumers across each jurisdiction. For residential interviewing conducted via telephone, sample was sourced randomly via White Pages. As was the case in previous years, participants were given the option of doing the survey online if they preferred. For those who completed an online survey, sample was sourced from a leading online panel provider, LightspeedGMI. The business interviewing was conducted via telephone using White Pages business sample.

In 2014, half of the residential surveying was conducted online and half via telephone. As few differences in responses were found between respondents across the two modes, in 2015 and 2016 a higher proportion was conducted online.

A pilot of n=93 CATI interviews and n=156 online surveys was conducted among residential consumers between 18-20 November 2015 and fieldwork continued until 13 December 2015; telephone interviews were conducted by 31 interviewers with an average length of 21 minutes. Telephone interviews with business consumers were conducted by 20 interviewers between 23 November and 22 December 2015, with an average length of 19 minutes.

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

Methodology Quotas (n=)	Residential	Business	Total
CATI	530	550	1,080
Online	1,620	-	1,620
Total	2,150	550	2,700

Further quotas were set to ensure that an excellent 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 participant profile has been included in Appendix Two to show the mix of consumers included in the sample.

Results were weighted to representative proportions of the population in each jurisdiction:

Weighting – Residential and Business	TOTAL
QLD – SEQ Capital	11%
QLD – SEQ Other	5%
QLD – Rest of State	6%
NSW – Capital	24%
NSW – Other	12%
ACT	2%
VIC – Capital	21%
VIC – Other	7%
TAS – Capital	1%
TAS – Other	2%
SA – Capital	7%
SA – Other	2%
TOTAL	100%

Results for residential consumers were also weighted by age and gender:

Weighting: Age x Gender – Residential Only	Males	Females
18-34	13%	15%
35-54	14%	19%
55+	21%	18%
TOTAL	100%	100%

The results were also used to develop a formal segmentation analysis to better understand the experiences and needs of vulnerable customers in relation to the competitive energy market. The segmentation analysis was undertaken with support from data analytics specialist The Clever Stuff, and developed through an iterative process which incorporated feedback from the AEMC. Qualitative research was also undertaken with vulnerable customers and the findings of these elements of the research are detailed in a companion report by Newgate entitled *AEMC 2016 Retail Competition Review: Understanding Vulnerable Customer Experiences and Needs*.

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 third wave of quantitative research measuring consumer attitudes towards energy markets in Australia. It is set out in chapters by jurisdiction because it was anticipated that, as with previous waves, many readers would be primarily interested in consumer opinions in their own state or territory. In order to provide some context in terms of how results between jurisdictions compare, the report also opens with a chapter focused on results across the NEM, with comparisons over time and between jurisdictions. We note, however, that such comparisons are only meaningful in the context of the various stages of deregulation each jurisdiction is respectively in – comparative interpretations should therefore be made with caution.

Please note that all references to the “NEM” throughout this report relate only to markets that offer consumers effective choice of different energy retailers, offers and options– i.e. South East Queensland (SEQ), New South Wales (NSW), the Australian Capital Territory (ACT), Victoria and South Australia. Tasmania (a new addition in 2015) and the rest of Queensland outside SEQ (a new addition in 2016) are therefore excluded from the NEM results herein to ensure comparability across time.

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 charts and tables. The results throughout the report are weighted to reflect population characteristics and enhance the data accuracy; please see the methodology section for further information on the specific weights that have been applied to the data.

Any statistically significant differences reported are at the 95% confidence level and noted using arrows (↑ ↓). While some differences may appear significant, they may not be considered *statistically* reliable due to small sample sizes. Differences have been noted year-on-year, including between 2016 and 2014, and noted accordingly. 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).

In interpreting the findings, please note:

- ‘Prompted’ responses identify that participants were offered a list of choices to select from and ‘unprompted’ questions allowed for participants to provide verbatim responses that were subsequently coded into common themes.
- 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.
- To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.
- Where differences are notable but not statistically significant across waves this is described through the use of terms such as ‘slightly’ or ‘somewhat’ higher / lower. Otherwise increases, decreases or differences between subgroups that are highlighted in the findings should be assumed to be statistically significant.
- The results are provided for each year in which the questions were included in the study, and are shown separately for residential and business consumers, as well as for electricity and gas. Where appropriate, trend comparisons have been shown. Results have not been shown for questions that had a significant wording change since 2014 – these are noted throughout

in the information beneath each chart / table, as well as in the questionnaire in Appendix One.

- Throughout the report the term NETT has been used where coded responses that are similar in nature have been grouped into one overarching theme. The term has also been used where we have grouped ratings provided on a scale from 0 to 10 e.g. ratings of a 7 or higher out of ten were nett good to excellent. Further, where we have grouped ratings on a semantic scale e.g. 'very satisfied' and 'somewhat satisfied' may be shown as 'nett satisfied', or 'agree somewhat' and 'agree strongly' as 'nett agree'.

For detailed results, please refer to the additional sub-group tables at NEM and jurisdictional levels, which are included in Appendices Three through to Nine.



NATIONAL ENERGY MARKET



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1. National Energy Market

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1.1 Key Findings

This is the first time in the annual retail competition review research that a NEM-level chapter has been included. Please note that reference to “NEM” results throughout this report (and chapter) relates only to the parts of the NEM that offer consumers effective choice of different energy retailers, offers and options— i.e. South East Queensland (SEQ), New South Wales (NSW), the Australian Capital Territory (ACT), Victoria and South Australia. Other parts of the NEM that offer no or very limited choice in the energy market are excluded from the NEM-level results, to also ensure comparability across time – specifically this includes Tasmania (a new addition in 2015) and the ‘rest of Queensland’ outside of SEQ (a new addition in 2016). However, results for these areas are detailed throughout where relevant. Note also that many of the questions in the survey were not asked of consumers in Tasmania and the rest of Queensland, as they related to experiences in the competitive market.

Statistically significant differences between subgroups are summarised throughout this chapter, however further detail can be found in the additional sub-group tables at NEM and jurisdictional levels in Appendices Three through to Nine. If no sub-group differences are detailed here, the reader should assume there were none. For example, there were limited differences between metropolitan and regional consumers throughout the survey results.

Significant differences are noted across jurisdictions. However, it is important to keep in mind that such comparisons are only meaningful when considered in the context of the various stages of deregulation each jurisdiction is respectively in – comparative interpretations should therefore be made with caution.

While some differences may *appear* significant, they may not be *statistically* reliable – typically due to small sample sizes. Differences are also noted year-on-year, including between 2016 and 2014. Statistically significant differences reported are at the 95% confidence level and 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).

For further information regarding how to interpret the findings please see the Notes to the Reader section of the main report.

1.1.1 Consumer Activity

Introduction

This section of the report details the findings of all consumers across the National Energy Market (NEM) in relation to their:

- Awareness and knowledge of their options in energy markets;
- Incidence and time spent investigating energy deals and offers in the last year;
- Reasons for *not* investigating different offers and options;
- Reported ease of comparing different offers and options;
- Used and preferred information sources for investigating different offers and options;
- Awareness of comparison websites – unprompted and prompted;
- Rates of switching energy company, plan and/or deal and the incidence of sales approaches from energy companies;
- Reasons for consumers not switching energy company or plan after investigating their options;

- Drivers: unprompted motivations and the level of importance of various factors in the decision to switch company/plan, and dollar savings needed for consumers to seriously consider switching; and
- Current behaviours – whether currently looking or interested in seeking a better deal.

The Results

Awareness of Choice in Energy Providers and Plans

Most consumers know they can choose their own energy company, and between different energy plans, while awareness remains lower in the ACT than in the rest of the NEM

Survey participants were asked a series of true/false questions to measure their level of knowledge about the energy market choices available to them in their state.

As charted on the following pages, across the NEM (excluding Tasmania and regional Queensland), most were aware that consumers in their state/territory can choose their electricity or gas company.

Awareness of the option to choose between different *energy plans, price structures, contract lengths and terms* with the same company tended to be lower, but the large majority of around eight in ten consumers across the NEM were still aware of this. Results on both of these measures have been relatively stable over time. Notable differences by jurisdiction and consumer segment are outlined below.

Awareness of the ability to choose companies among *business consumers* has dropped since 2015: from 96% for electricity companies to 92% this year, and from 92% for gas companies to 90%. However, awareness remains higher than in 2014 (88% aware they can choose from a range of electricity companies, and 85% for gas companies).

Notably, *residential consumers* who had been approached by a retailer in the last 12 months were more likely to be aware of their ability to choose from a range of electricity and gas companies (96% vs. 92% of electricity consumers who had not been approached, and 93% vs. 87% respectively among gas consumers). Those aged under 34 years were significantly less aware of their ability to choose companies - i.e. 89% of residential electricity consumers vs. 95% of those 35 years of age and over and gas consumers: 85% vs. 92%.

Across most jurisdictions, awareness of choice of energy companies and plans again tended to reflect overall NEM results. However, in the Australian Capital Territory (ACT), awareness remained significantly lower. For example, 73% of residential ACT consumers knew they could choose from a range of electricity *companies*, compared with the NEM average of 93%. This was consistent with 2015 levels (72%) after improving significantly from 57% in the 2014 benchmark. Further, three in five knew they could choose from a range of electricity *plans* (61%, dropping slightly from 65% in 2015), compared with the NEM average (82%).

The large majority of residential consumers in Tasmania were aware they had no choice in electricity company (79%) or from a range of electricity plans (67%). In the rest of Queensland, even if they did not necessarily have a choice themselves, around half of residents (49%) and four in ten businesses (38%) were aware that consumers in South East Queensland were able to choose their electricity *company*, and similar proportions knew that individual retailers offer a range of different *plans and options* (46% of residential consumers, 48% of business consumers).

Awareness of Ability to Choose Energy Company (NEM)

Consumers can choose their electricity company

Residential



Business



Consumers can choose their gas company

Residential



Business



■ Don't know

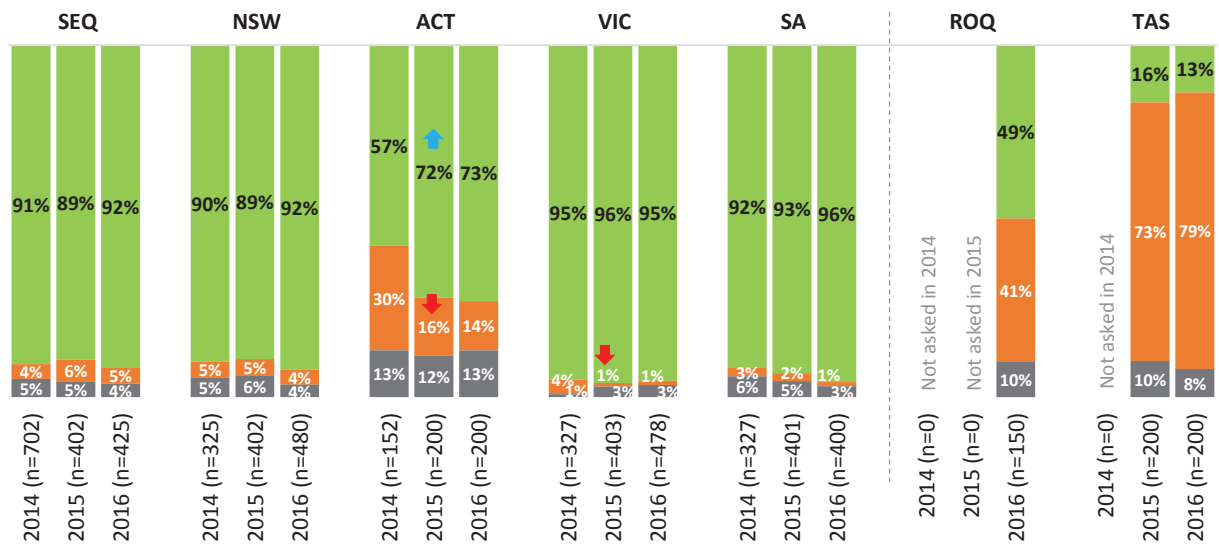
■ False

■ True

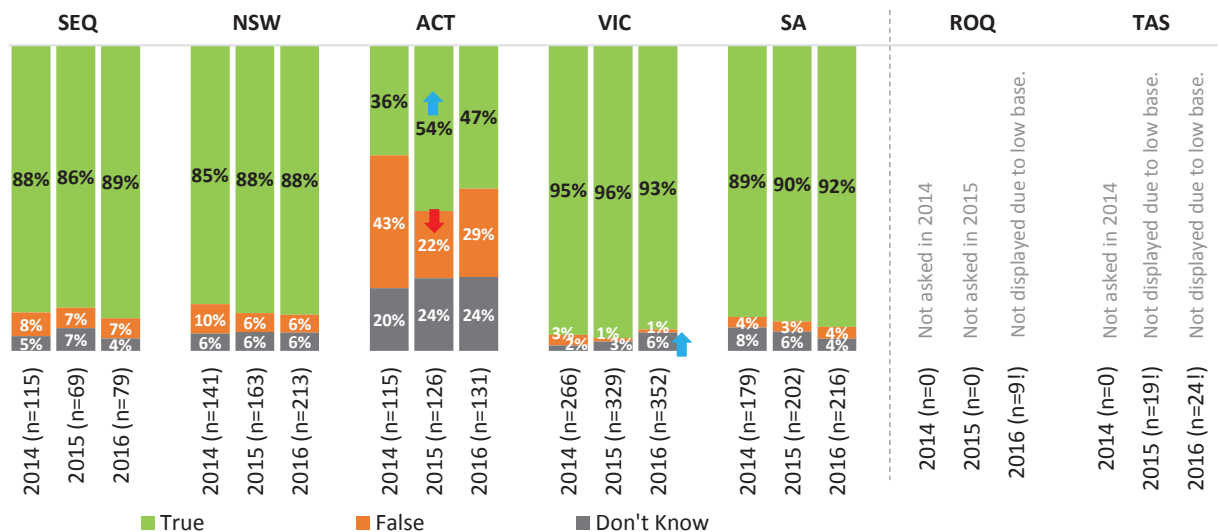
Base: All survey participants. Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company. b) Consumers in your state [territory] can choose their gas company.

Awareness of Ability to Choose Energy Company (by Jurisdiction – Residential Only)

Consumers can choose their electricity company



Consumers can choose their gas company



Base: All survey participants; participants with mains gas. NB: Gas results for small business consumers within each jurisdiction not shown due to low base sizes.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company. b) Consumers in your state [territory] can choose their gas company.

Awareness of Ability to Choose From Different Energy Plans, Offers Etc. (NEM)

Consumers can choose from different electricity plans and options

Residential



Business



Consumers can choose from different gas plans and options

Residential



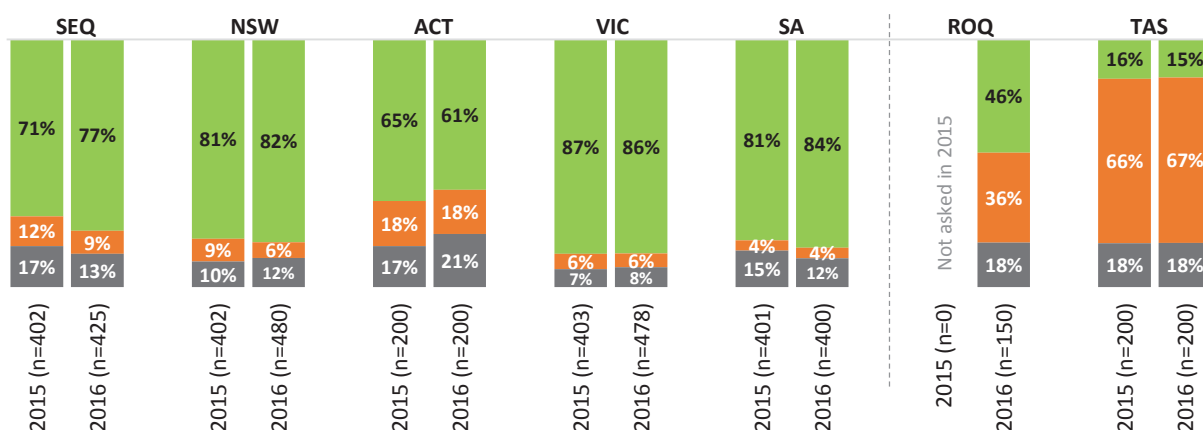
Business



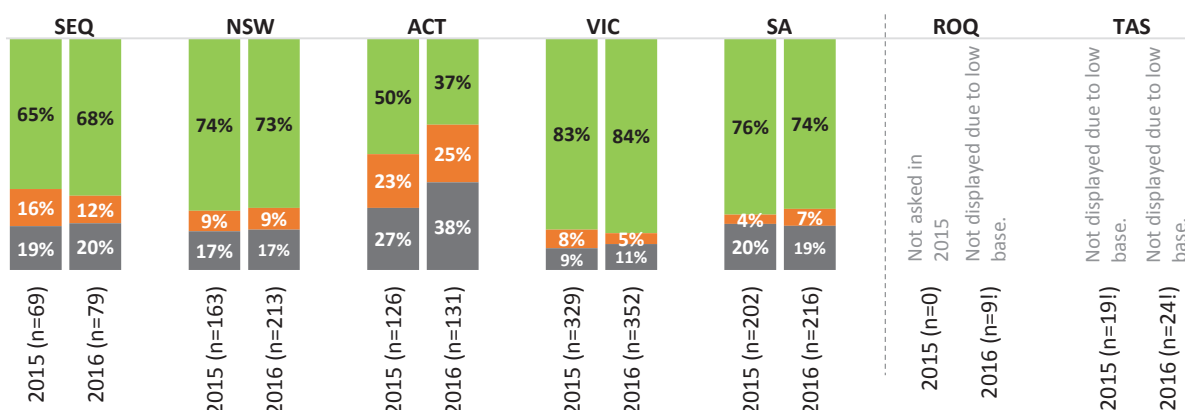
■ Don't know ■ False ■ True

Awareness by Jurisdiction – Residential Only

Consumers can choose from different electricity plans and options



Consumers can choose from different gas plans and options

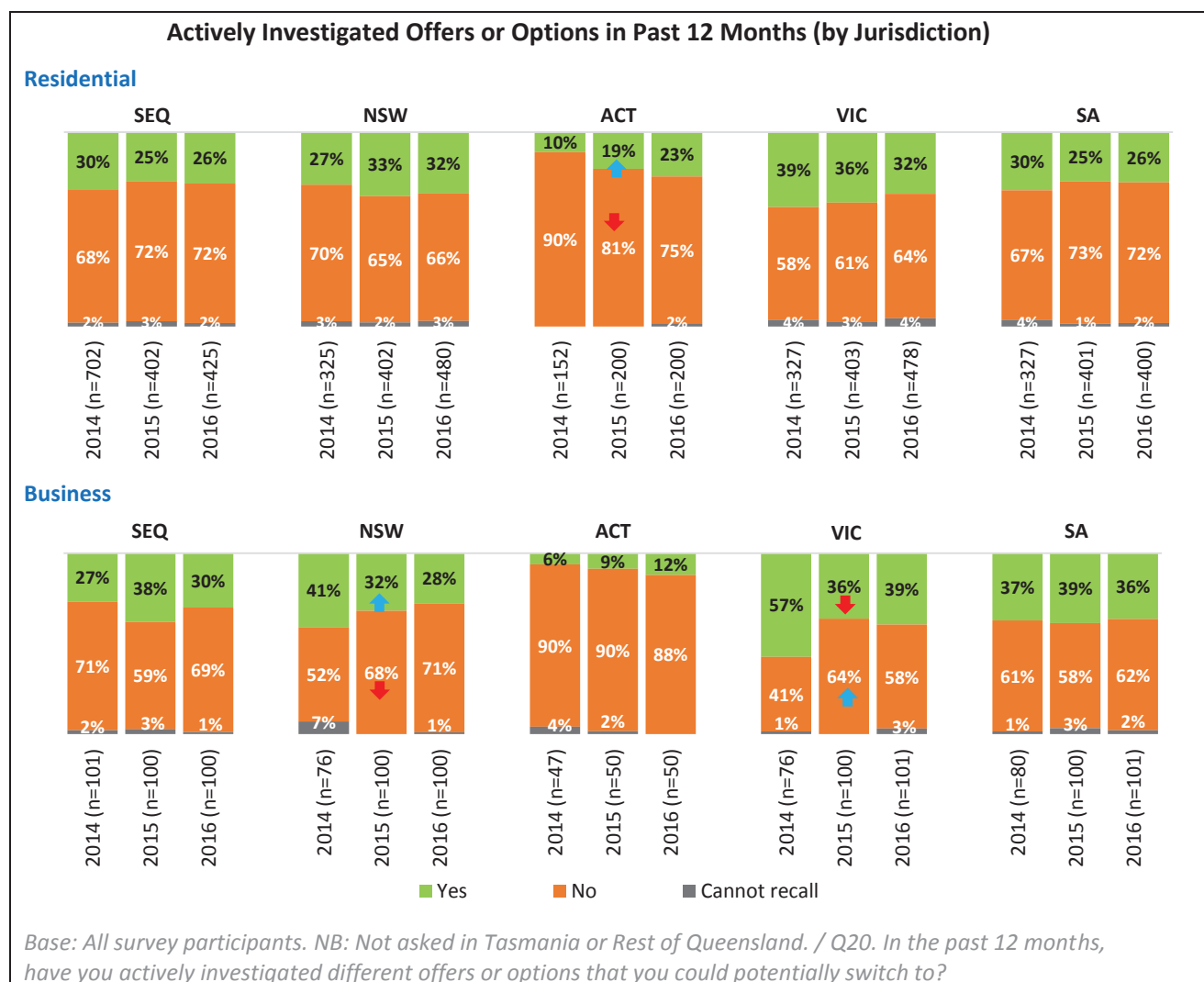


Base: Participants with mains gas. ! Caution low base size: results indicative only. NB: Question wording changed in 2015, so results are not directly comparable with 2014.

Q13d. Consumers in your state/territory can choose from a range of different types of gas plans, price structures, contract lengths and terms.

Investigating Energy Options

Around three in ten consumers had actively investigated offers or options, but this has declined over time for small business consumers



Around three in ten consumers across the NEM had actively investigated different energy offers or options in the previous 12 months. While this has been consistent over time for residential consumers (31% in the previous two reviews and 30% in 2016), there is a significant declining trend among business consumers from 43% in the 2014 benchmark to 32% in 2016.

Consumers across most jurisdictions had investigated their options in similar proportions to the NEM. Reflecting the lower awareness of choice in the ACT, consumers in that jurisdiction were the least likely to have investigated offers and options (23% compared to the NEM average of 30%), and, as shown later in this chapter, they were also among the least likely to have received a direct approach from a retailer (26% had received an approach vs. a NEM average of 38%). However, there has been a gradual increase in investigation of offers and options over time among both residential ACT consumers (more than doubling from 10% in 2014 to 23% in 2016) and business consumers in the ACT (doubling from 6% to 12%).

Overall, 67% of residential consumers across the NEM had not investigated their energy options in the past 12 months. By subgroup, the following were significantly more likely to have not investigated their energy options:

- Females (70% vs. 64% of males);
- Without tertiary qualifications (73% vs. 65% of those with tertiary qualifications);
- More risk-averse (71% of those who rated their willingness to take risks as 0-6 out of 10, compared with 59% of those who rated their risk willingness as 7 or higher);
- Technology laggards or part of the late majority of adopters (76% vs. 62% of those who self-identified as innovators, early adopters or part of the early majority);
- Less internet-proficient (77% of those who rated their comfort with using the internet as 0-6 out of 10 vs. 66% among those who rated their comfort levels highly – i.e. 7-10);
- Consumers who do not have solar panels (69% vs 59% with solar panels);
- Not considering installing solar panels (74% vs. 57% likely to install solar); and
- Not considering installing storage batteries (72% vs. 53% who have/want to install batteries).

Reasons for Not Investigating or Switching

Consumers who had not investigated energy options and had not switched energy company or plan were either happy with their current retailer or plan, or to a lesser extent just too busy

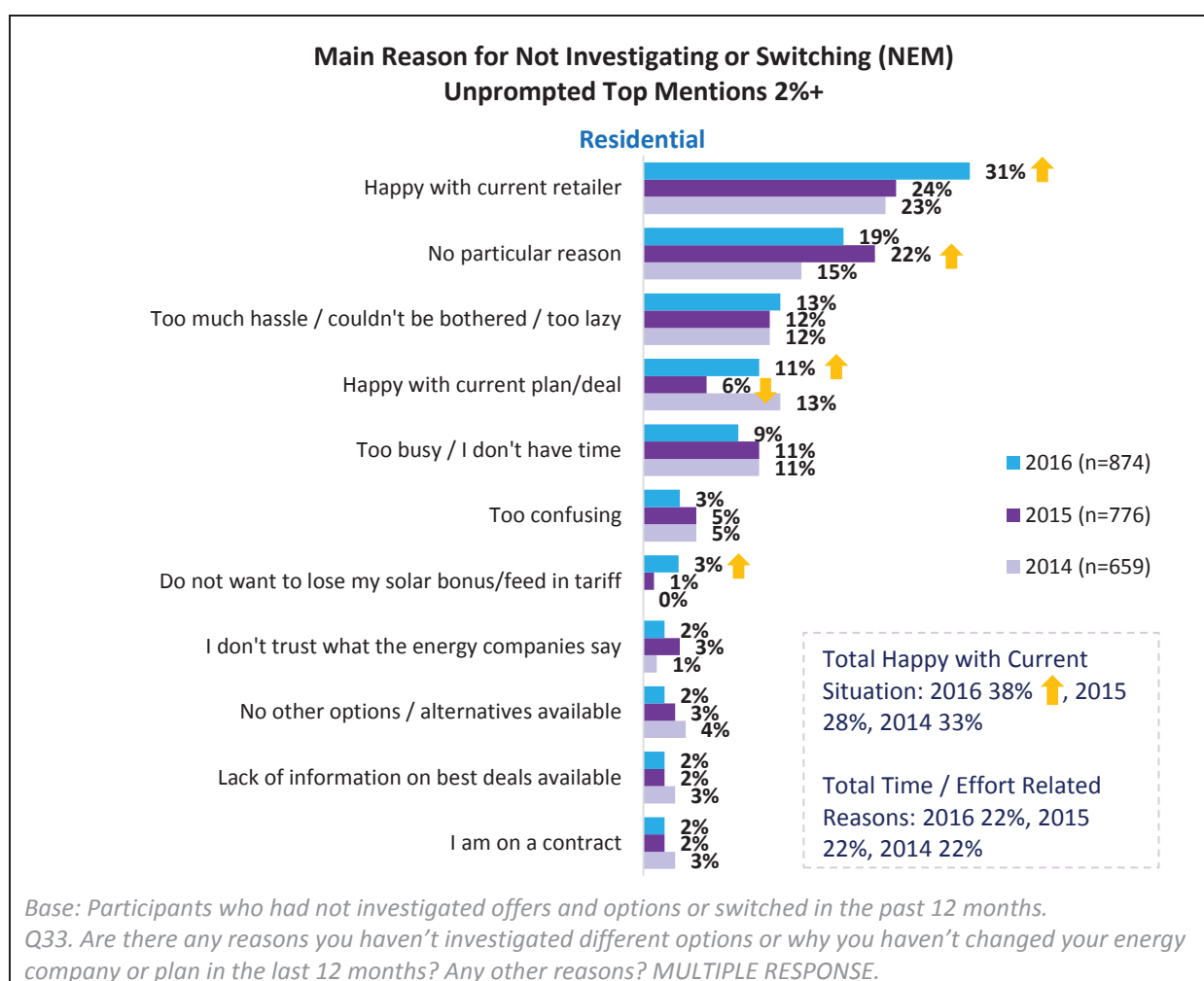
Consumers who had not investigated energy options and offers in the past 12 months were asked why they had not done so. The most commonly cited reasons among residential consumers were related to being happy with their current retailer (31%, up significantly from 23% in 2014 and 24% in 2015) and/or happy with their current plan or deal (11%) – adding up to a nett of 38% being happy with their current arrangements.

At lower levels, some residential consumers didn't investigate their options because it was too much hassle (13%, consistent with 12% in both 2014 and 2015), or they were too busy or short on time (9%, relatively consistent with 11% in both 2014 and 2015). These results were also largely consistent across jurisdictions.

While the same reasons were cited by business consumers who had not investigated options and offers, their top reason was lack of time or being too busy (22%, down slightly from 32% in 2014 and 31% in 2015), followed by being happy with their current retailer (18%, trending up slightly from 12% in 2014) or they were happy with their current arrangements (9%, down significantly from 16% in 2015 but relatively consistent with 5% in 2014). These results were not statistically significant due to small samples.

While results among business consumers across jurisdictions were mostly consistent with the NEM, those in South East Queensland and South Australia were significantly more likely to cite wanting electricity and gas with the same provider as a reason for not looking into their options – indicating a lack of understanding of what is available (19% and 18% respectively, vs. 6% across the NEM). As with residential consumers, business consumers from the ACT were also more likely to simply believe there were no other options (15% vs. 3% NEM-wide).

By sub-group, *residential* consumers who didn't investigate because they were short on time or energy to engage were significantly more likely to be under 55 years of age (24% vs. 16% of those aged 55+), have larger electricity bills (nett 26% vs. 18% of those with small bills) and *not* have solar panels installed (24% vs. 14% with solar). Among *business consumers*, those with solar panels were also less likely to say they were too busy / didn't have time to investigate (29% vs. 40%), providing further evidence that those with solar panels are generally more engaged in energy matters.



Time Spent Investigating

Younger, working males in capital cities spent more time investigating energy options than others

Among residential consumers who *had* investigated energy options in the past 12 months, the majority (69% residential, 76% business) had spent no more than two hours doing so. Those who spent *three hours or more* (27% of those who had investigated their options) were significantly more likely to live in a metropolitan area (30% vs. 20% regional), be male (31% vs. 22% of females), aged under 35 years (37% vs. 23% of those aged 35 or above) or had a high gas bill of \$300+ in the preceding quarter (44% vs. 26%). Among business consumers, those who owned their premises were slightly more likely to have spent three hours or more investigating offers and options (31% vs. 15% of tenants).

Residential consumers *who spent less than an hour investigating* were significantly more likely to not be in paid employment (38% vs. 26% employed), be aged 55+ (36% vs. 28% of those aged under 55), have had an electricity bill of less than \$300 in the preceding quarter (42% vs. 24% who had electricity bills of \$300+) and not have a tertiary qualification (43% vs. 27% tertiary-qualified).

Information Sources – Among Those Who Did Not Switch

Google and other internet-based searches were the most popular and most useful information source amongst those who chose not to switch

Consistent across all NEM jurisdictions, the information sources used to investigate energy options by consumers who did not go on to switch energy company or plan have remained largely consistent year-on-year, and among residential and business consumers. Around seven in ten had used internet-based sources (nett 69% of residential and 71% of business consumers), with the most popular specified sources being a Google or other internet-based search (42% residential, 46% business) and price comparison websites (28% residential, 22% business). The next most common information source was through self-initiated direct contact with a retailer by phone or website (nett 20% residential, and 12% of businesses).

The most used sources were also seen as the most *useful* in helping consumers with their decision not to switch. In total 47% of residential and 45% of business consumers mentioned generic ‘internet’ sources of information as the most useful, followed by price comparison websites (14%, 15%).

Notably, there was a significant increase consumers saying that none of the information sources were useful, with 18% of residential and 38% of business consumers mentioning this.

Reasons for Investigating but Not Switching

The most common reason for consumers investigating but not switching was satisfaction with their current energy company, plan or counter offer

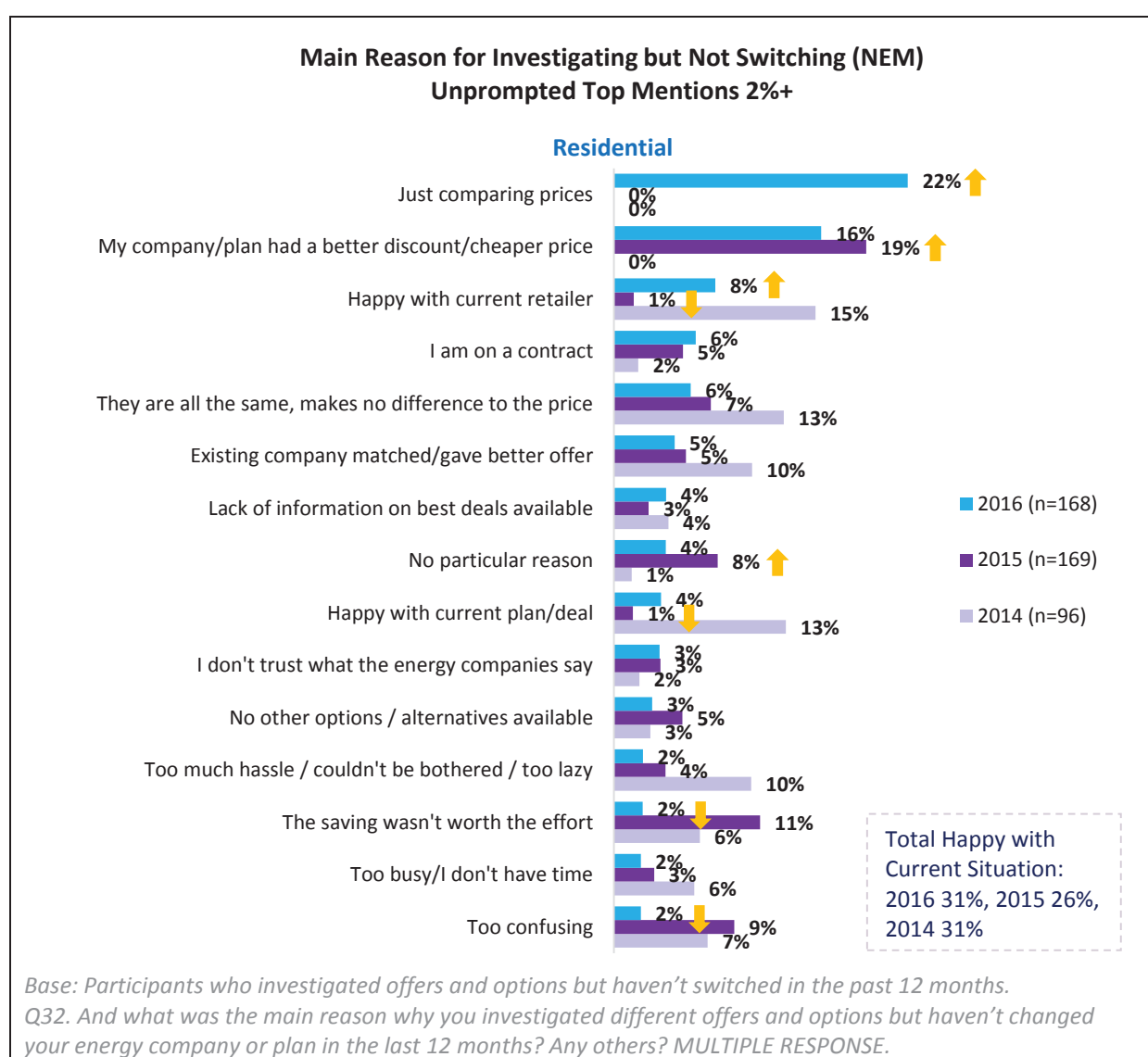
Of those consumers who had investigated offers and options one in five residential consumers (20%) and around a quarter of business consumers (24%) did not go on to switch. Of the total, 15% of all residential consumers and 19% of all business consumers had investigated but did not switch.

When grouping the response themes, nett 53% of these residential consumers and 20% of the small businesses indicated that they didn’t go on to switch because they found that their current arrangements were acceptable – showing that a lack of a better value proposition was the overarching reason for not switching.

Among residential consumers, the main specific reason for investigating but not switching was barely mentioned in 2014 and 2015 – i.e. for this review the top reason was ‘just comparing prices’ (22%). This was not coded as a standalone response theme in 2014 and 2015 due to the small number of mentions. Other top mentions in 2016 included: my company or plan had a better price (at 16%, similar to 2015 when this theme first emerged at 19%), or they were happy with their current provider (up from 1% in 2015 to 8%, after a peak of 15% in 2014).

Results were similar for business consumers and broadly consistent year-on-year, with the top reason being that their current provider had a better plan or deal (at 14%, down slightly from 20% in 2015), followed by doubt regarding whether switching would make a difference (7%, down slightly from 13% in 2015).

Residential consumers in SA were more likely than other jurisdictions to say *their current plan or deal was better than others on the market* (37%), this was also the most common reason in SA. Consumers in SEQ and the ACT were more likely to say *there were no other options available* (10% and 11%, respectively) however this result was not significant in the ACT due to small sample size.



Ease of Comparing Options

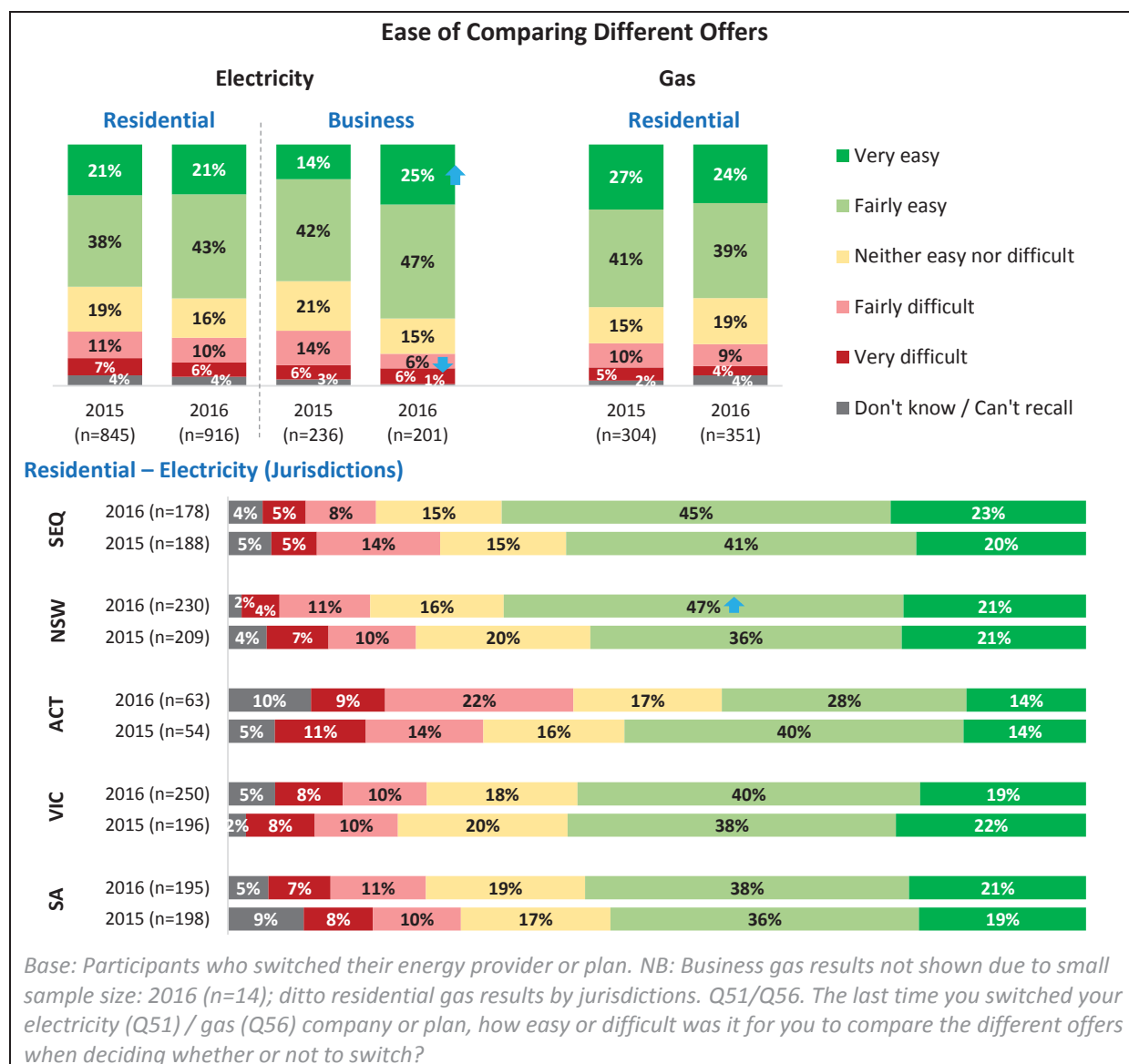
More business switchers found it easy to compare electricity offers and options than in 2015

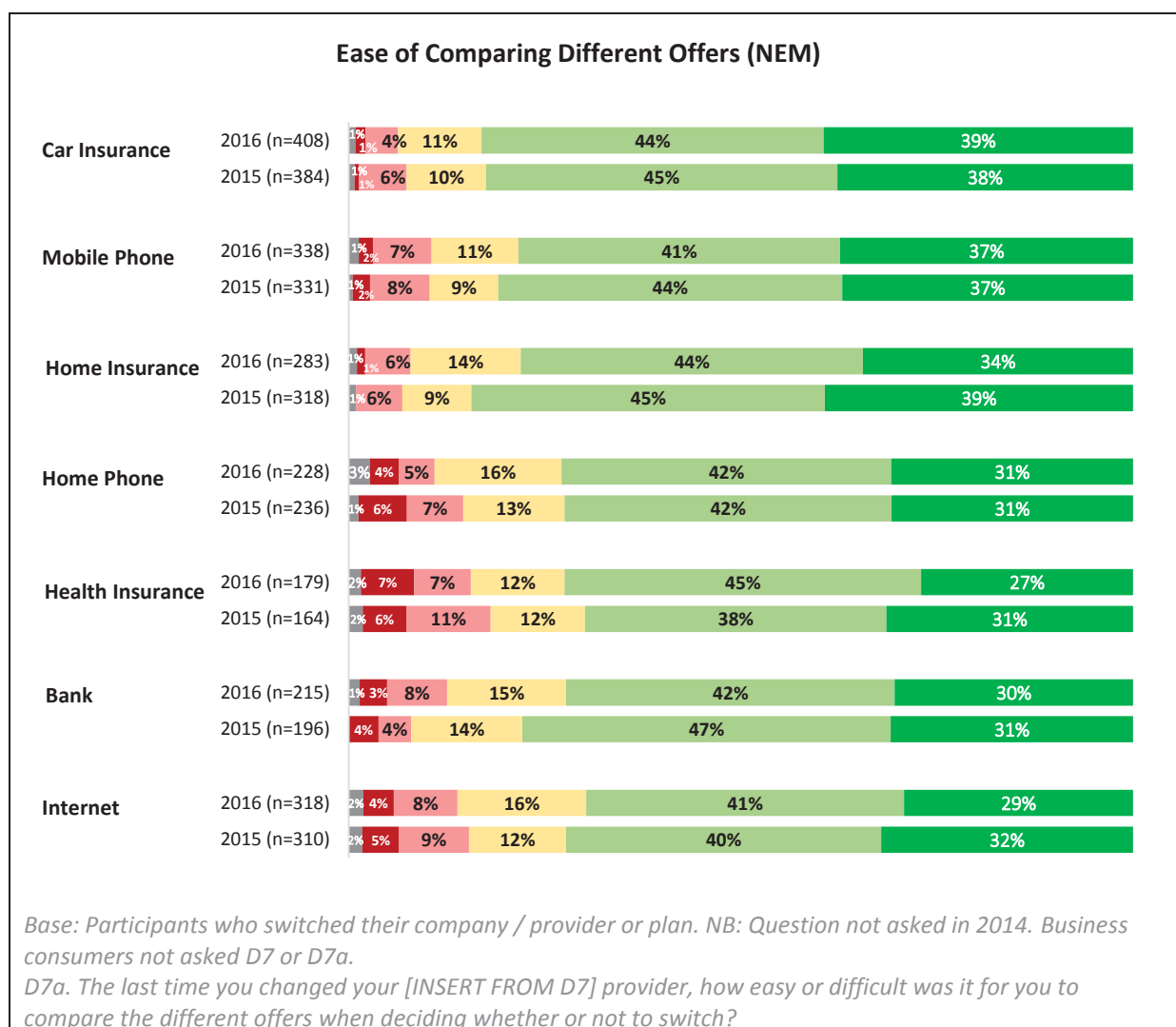
When asked about their most recent experience in switching energy provider or plan, residential consumers tended to say it was fairly or very easy to compare different offers (nett 64% for both electricity and gas, which was consistent with 2015 results). By comparison, small business consumers became more likely to say it was fairly or very easy to compare electricity offers: nett 72% – up significantly from 57% in 2015.

Results were similar across jurisdictions, with a notable 31% in the ACT saying it was very / somewhat difficult to compare offers – around double the level across the NEM overall.

As in 2015, residential switchers generally found it easier to compare offers for other services asked about; in particular car insurance (with nett 83% of switchers rating this fairly or very easy), mobile phone (nett 78%) and home insurance (78%).

Results for the ease of comparing information among gas switchers showed the same story as for electricity switchers, so are not charted here – however, details are provided in the jurisdictional chapters and Appendix.





Main Information Sources Used to Switch Energy Company or Plan

Consistent with results among non-switchers, across jurisdictions and against 2015, the internet was the most commonly used source of information for switchers

The types of information sources used by consumers who had switched energy company or plan in the past five years remained consistent with 2015 results (the question was not asked in 2014). Around half used internet-based sources such as Google and other internet-based search engines to switch *electricity company or plan* (30% residential, 25% business) or price comparison websites (13% residential, 12% business). Results were virtually the same for those who switched gas company or plan: e.g. Google and other internet-based search engines was at 34% among residential consumers and 12% for price comparison websites (results not reported for businesses due to small sample sizes). Across jurisdictions, residential consumers in SEQ were significantly more likely to have used price comparison websites in researching electricity offers (19% vs. 13% across the NEM).

Consistent with 2015 results, around two in five NEM consumers who had *switched electricity company or plan* rated internet-based information sources as the most *useful*, including internet-based searches, price comparison websites or looking up a retailer website (nett 41% of both residential and business consumers). Around one in five said direct contact methods were the most useful i.e. phoning a retailer, a visit from a door-to-door salesperson or a phone call from a salesperson (nett 20% residential and 17% of businesses).

A similar proportion of residential consumers who had switched *gas* company or plan found internet-based sources the most useful (nett 44%). There was a significant number of mentions of general internet searches being the most useful source (from 19% in 2015 to 27% this year).

Preferred Information Sources

Among all consumers surveyed, internet sources would still be their most preferred if they were looking for information about different energy offers in the future

All survey participants were asked what information source they would most prefer to use in the future to find out about different energy companies and offers. Consistent year-on-year, around four in ten consumers named 'the internet' in general (38% residential, 41% of businesses).

It is worth noting that the proportion of business consumers who preferred comparison websites (20%) was significantly higher than in 2014 (8%) and higher than results among residential consumers (16%).

Preference for calling retailers has also increased significantly among both residential (11%, from 8% in 2014) and business consumers (12%, from 5% in 2014), while residential consumers are now significantly less likely to visit retailers' websites (9% vs. 14% in 2014).

Energy Comparison Websites

Unprompted recall of comparison websites continued to increase, particularly for iSelect and Compare the Market. However, recall of Government comparison websites remained very low

Around three in ten residential consumers (nett 28%) and just over a third of business consumers (nett 34%) were able to cite the name of at least one comparison website without prompting. Significantly fewer residential consumers said they didn't know of any: from 67% in 2014 and 65% in 2015, down to 59% in 2016 among residential consumers, while 53% of business consumers said 'don't know', marking a return to benchmark levels of 53%, after rising to 68% in 2015. A further 7% of residential and 8% of business consumers knew of comparison websites but couldn't name any.

Only two websites stood out for unprompted recall, both experiencing significant increases in awareness from the 2014 benchmark wave: iSelect (16% residential, up from 11% in 2014 and 13% in 2015; 21% business, up from 10% in 2014 and 15% in 2015), and Compare the Market (8% residential, up from 2% in 2014 and 4% in 2015; 8% business, up from 4% and 3%).

When prompted with a list of options, only one in ten consumers in all of South East Queensland, NSW, ACT, Tasmania and South Australia were aware of the government comparison website Energy Made Easy (residents: 9% and businesses: 11%). This question was asked in ACT, NSW and South Australia from the 2014 benchmark year. Over the three years, awareness in these states has remained relatively stable among residential consumers, though with a significant decline from the last wave (from 12% in 2014, to 15% in 2015 and 10% in 2016), while awareness has fluctuated quite a bit among business consumers: from 23% in 2014, to 6% in 2015, then doubling to 12% in 2016. Among residential consumers, awareness of Energy Made Easy was lowest in the ACT (3%), and strongest in South Australia (13%), with average levels for NSW at 9%. However, among business consumers awareness was highest in the ACT (18%) followed by 15% in South Australia and 11% in NSW.

Switching Behaviour

Switching rates have held ground among residents after the 2015 decline, while among small businesses a decline is observed this year

Around half of all consumers in the NEM reported having switched an energy provider or plan in the *past five years*. Residential switching rates held steady against 2015 after a significant decline from the benchmark year: from 61% in 2014, to 52% in 2015 and 49% in 2016. Among business consumers a significant decline occurred this year after stable results in the first two years: from 57% in both 2014 and 2015, to 48% in 2016.

Switched at least once in the last **FIVE YEARS**

RESIDENTIAL	NEM			SEQ	NSW	ACT	VIC	SA
	2014 (n=1,833)	2015 (n=1,808)	2016 (n=1,983)	2016 (n=425)	2016 (n=480)	2016 (n=200)	2016 (n=478)	2016 (n=400)
Electricity Company	48%	40% ↓	37% ↓	32%	36%	15%	43%	35%
Electricity Plan	39%	32% ↓	25% ↓	22%	26% ↓	23%	25% ↓	28%
TOTAL Electricity	60%	51% ↓	48%	42%	48%	32%	52%	49%
Gas Company	40%	35%	29% ↓	21%	25%	6%	36%	26%
Gas Plan	30%	24% ↓	19% ↓	23%	18%	8%	18%	22%
TOTAL Gas	49%	41% ↓	38%	27%	33%	13%	46%	38%
TOTAL Electricity or Gas	61%	52% ↓	49%	43%	49%	32%	54%	50%
Car Insurance	37%	35%	33%	38%	32%	34%	33%	30%
Mobile	32%	31%	30%	30%	33%	32%	28%	22% ↓
Internet	30%	29%	27%	23% ↓	30%	35%	27%	23% ↓
Home Insurance	22%	26%	23%	27%	21%	23%	21%	25%
Home Phone	22%	20%	19%	16% ↓	20%	22%	19%	15%
Banking	18%	19%	17%	20%	18%	18%	14%	17%
Health Insurance	13%	16%	14%	16%	14%	17%	14%	12%
BUSINESS	NEM			SEQ	NSW	ACT	VIC	SA
	2014 (n=380)	2015 (n=450)	2016 (n=452)	2016 (n=100)	2016 (n=100)	2016 (n=50)	2016 (n=101)	2016 (n=101)
Electricity Company	47%	45%	36% ↓	31% ↓	38%	4%	36%	41%
Electricity Plan	39%	33%	26% ↓	25% ↓	27%	14%	22%	35%
TOTAL Electricity	56%	56%	47% ↓	38% ↓	52%	16%	45%	57%
Gas Company	46%	19% ↓	11%	Not shown due to small sample sizes.				
Gas Plan	50%	16% ↓	7%					
TOTAL Gas	56%	23% ↓	15%					
TOTAL Electricity or Gas	57%	57%	48% ↓	38% ↓	53%	16%	46%	59%

Base: All survey participants; participants with mains gas (and if small business gas bill). NB: Not asked in Tasmania or Rest of Queensland. **Gas results for small business consumers not shown due to small sample size. Q17a. In the past 5 years, how many times have you changed the following? Significance arrows across jurisdictions show significant upwards or downward trends across years within each jurisdiction. 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?

Residential consumers who had switched in the last five years were more likely to:

- Be aged 35 years or older (53% vs. 41% of those aged below 35); and
- Have quarterly electricity bills of less than \$500 (53%) compared with those with bills of \$500+ (44%).

A converse difference was observed among business consumers, where those with *higher* electricity bills of \$1,000+ were more likely to have switched (65% vs. 43% of those with bills under \$1,000). Further, business consumers with mains connected gas were also significantly more likely to have switched in the past five years than those without (53% vs. 34%).

Across the NEM (excluding Tasmania and regional Queensland), switching an energy company or plan in the past five years was the highest among residential consumers in Victoria (54%) and South Australia (50%), while business switching rates were highest in South Australia (59%) and NSW (53%). The ACT was a consistent outlier: 32% among residential consumers, and 16% among business consumers.

It is worth noting that although consumers tended to indicate that it was more difficult to compare energy offers than those in sectors such as insurance and banking, energy switching rates still tended to be higher than most of these sectors. In 2016, 33% of residential consumers in the NEM had switched car insurance provider, 30% mobile phone provider, 17% banking provider, and 14% health insurance. As shown in the table on the previous page, five-year switching rates for the services asked about outside of energy have also remained stable over the three years of the study.

Switching rates for energy companies or plans *within the past 12 months* reflected the same trend as for the last five years – i.e. holding steady against 2015 for residential consumers (24% vs. 26% in 2016), and declining for business consumers (from 29% to 21% - due to less switching of both electricity companies and plans).

Switched at least once in the last 12 MONTHS

RESIDENTIAL	NEM		SEQ	NSW	ACT	VIC	SA
	2015 (n=1,808)	2016 (n=1,983)	2016 (n=425)	2016 (n=480)	2016 (n=200)	2016 (n=478)	2016 (n=400)
Electricity Company	15%	14%	10%	15%	5%	18%	11%
Electricity Plan	16%	14%	11%	15%	13% ↑	15%	13%
TOTAL Electricity	22%	24%	18%	25%	18%	27%	20%
Gas Company	17%	13% ↓	12%	10%	2%	17%	13%
Gas Plan	14%	12%	10%	13%	6%	12%	15%
TOTAL Gas	21%	20%	14%	17%	8%	24%	23%
TOTAL Electricity or Gas	24%	26%	18%	27%	19%	30%	23%
BUSINESS	NEM		SEQ	NSW	ACT	VIC	SA
	2015 (n=450)	2016 (n=452)	2016 (n=100)	2016 (n=100)	2016 (n=50)	2016 (n=101)	2016 (n=101)
Electricity Company	19%	12% ↓	8%	15%	4%	11% ↓	17%
Electricity Plan	17%	12% ↓	10% ↓	10%	4%	13%	19% ↑
TOTAL Electricity	29%	20% ↓	15% ↓	21%	8%	20% ↓	31% ↑
Gas Company	10%	6%	Not shown due to small sample sizes.				
Gas Plan	10%	5%					
TOTAL Gas	13%	8%					
TOTAL Electricity or Gas	29%	21% ↓	15% ↓	22%	8%	20% ↓	31% ↑

Base: All survey participants; participants with mains gas (and if small business gas bill). NB: Not asked in Tasmania or Rest of Queensland. Not asked in 2014.

Q17b. In the last 12 months, how many times have you changed the following?

Notably though, there was a significant decline in residential gas company switching within the last year (to 13%, down from 17% in 2015). This appears to be driven by decreases in NSW (at 10%, down from 19% in 2015) and the ACT (2%, from 6% in 2015).

Residential consumers were significantly more likely to have made a switch in the past 12 months if they had:

- Been approached by a retailer (36% vs. 20% of those not approached directly);
- Investigated their options (50% vs. 15% of those who had not investigated);
- Had a reduction in household income (33% vs. 24% of those whose income had not reduced); and
- Had unforeseen circumstances that severely affected their financial situation (35% vs. 23% of those who did not experience such circumstances).

Business consumers who made a switch in the past 12 months were also more likely to have been approached by an energy company (26% vs 15%), though this was not statistically significant.

Direct Approaches by Energy Companies

Steady residential switching rates in the last 12 months were in line with a stable level of direct approaches from energy companies

Two in five residential consumers (38%) had been approached by an energy company offering to sell them electricity or gas in the past 12 months, which is steady against 2015 (40%) after the significant decline from 2014 (53%). As noted above, those who were approached directly were significantly more likely to have made a switch (36% vs. 20% of those not approached directly).

Businesses remained more likely than residential consumers to report having been approached (at 51%, which is slightly lower than in 2014 and 2015; both at 54%).

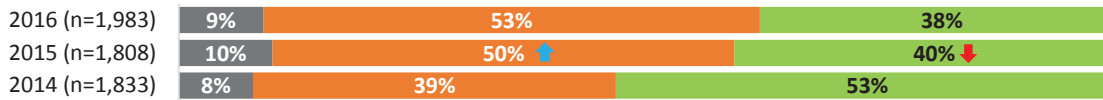
Residential consumers who were more likely to have been approached included those who: own their home (40% vs. 34%), have dual fuel (45% vs. 30%), and/or have solar panels or hot water installed (nett 44% vs. 36%). Business consumers with larger electricity bills (higher than \$1,000) were more likely to have been approached (63% vs. 47% of those with smaller bills).

By jurisdiction, residential consumer approaches were least likely in South East Queensland (24%) and the ACT (26%). These were the two lowest jurisdictions among businesses as well (43%, 36% respectively). By contrast, direct approaches were most common in Victoria and NSW for residential consumers (45%, 39% respectively), and Victoria and South Australia for small businesses (59%, 55%).

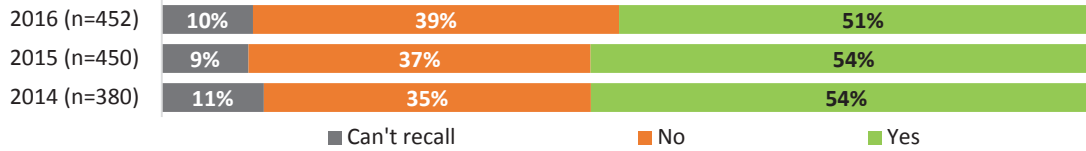
It is worth noting that among residential consumers there is a declining trend of receiving direct approaches over time in all jurisdictions except the ACT, which remains higher than the benchmark (from 10% in 2014 to 29% in 2015 and 26% this year), suggesting some increased competition in that jurisdiction. This also corresponds with an increase in investigating options in the ACT, as noted earlier (at 23%, from 10% in 2014 and 19% in 2015).

Approached by Any Energy Companies in Past 12 Months?

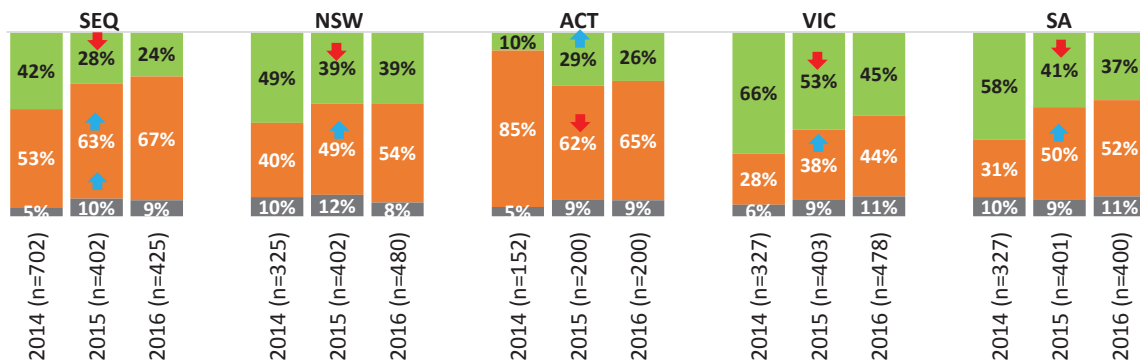
Residential NEM



Business NEM



Residential by Jurisdiction

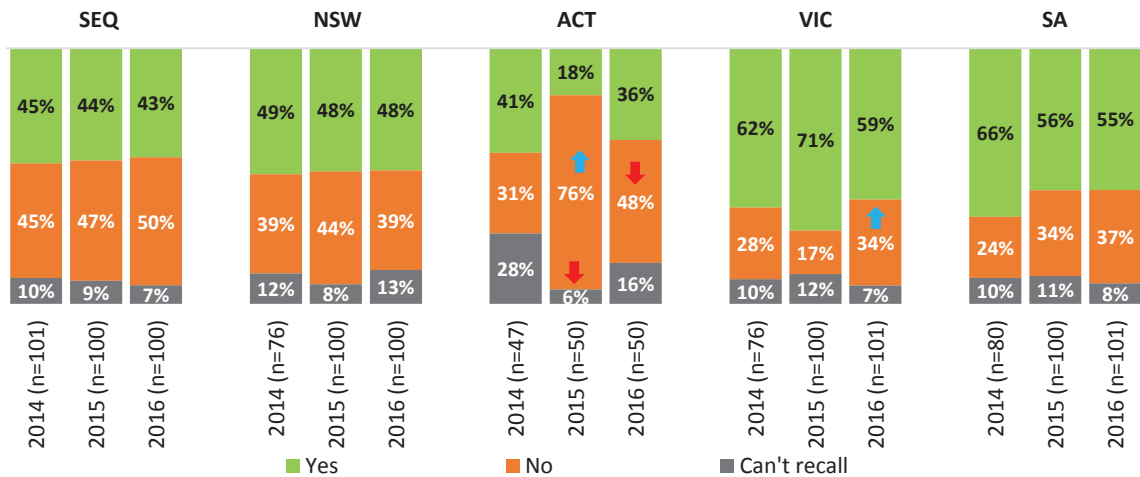


Base: All survey participants.

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

Approached by Any Energy Companies in Past 12 Months? (Cont'd)

Business by Jurisdiction



Base: All survey participants.

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

Of the residential consumers across the NEM *who were approached*, on average they recalled being approached by 2.7 energy companies in the past 12 months, which is slightly higher than in 2015 (2.3) and yet slightly lower than in 2014 (2.9).

A similar number of companies approached business consumers (2.8 on average among those approached across the NEM), which is broadly consistent with previous years (3.2 in 2015, 3.0 in 2014). Around half of these consumers reported being approached by only 1 or 2 providers (53% residential, 47% of businesses), while 25% of these residential consumers and 24% of these business consumers recalled being approached by 3 or 4 providers.

Residential consumers who had switched energy company or plan in the past five years had on average been approached by more companies (2.9) than those who had not switched (2.2). In contrast, business switchers had on average actually been approached by slightly fewer companies (2.7 vs. 3.0 for non switchers).

Drivers of Switching

Price related factors remained the main unprompted reason for switching

Broadly consistent with 2015, around seven in ten consumers *who had switched company or plan in the last five years* nominated price related factors as their main reason for switching – i.e. wanting a cheaper price, receiving higher-than-expected bills or being offered discounts (nett 69% of residential electricity consumers and 72% of residential gas consumers, along with 72% of business *electricity* consumers).

At much lower levels, the second most cited theme was ‘service related’, including having a bad experience with their previous company and dissatisfaction in general (nett 8% of both residential electricity and gas consumers, and 9% of business electricity consumers).

Participants who had actively investigated options and offers were more likely to report being offered a discount, good incentive or a better price (45%) than those who had not actively looked into their options (36%).

Broadly consistent by jurisdiction, discounts offered and price per kWh were considered the most important prompted factors in consumers’ decision to switch electricity company or plan

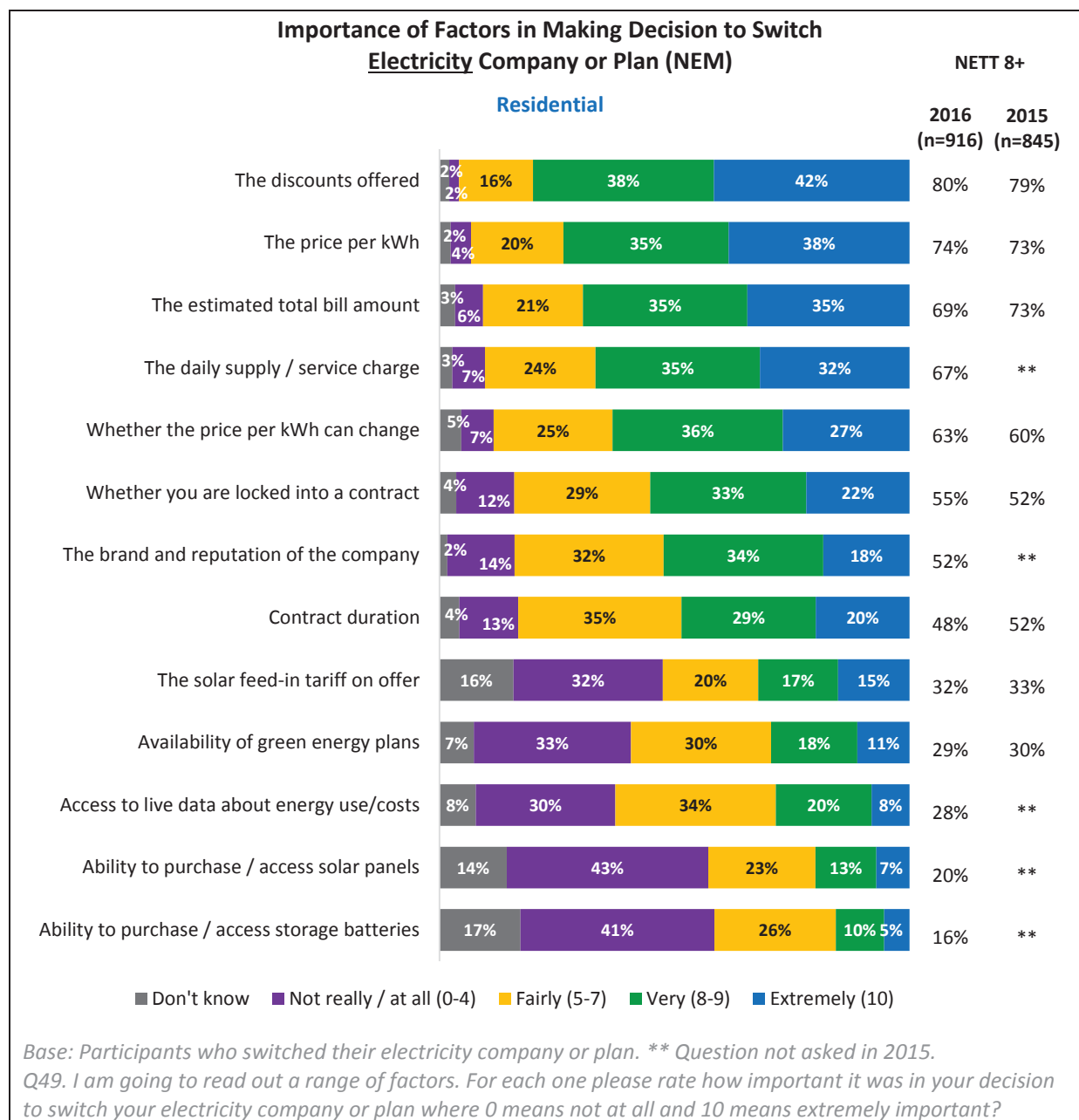
When consumers *who had switched electricity company or plan in the past five years* were prompted with a range of factors that could be considered when making the decision to switch, most felt that the following factors were highly important (with an importance rating of 8 or more out of 10): the discounts offered (80% residential, 83% business), the price per kilowatt hour (74% residential, 87% business), followed by the estimated total of the bill (69%, 80%). The least important factors were: the ability to purchase or access storage batteries (16%, 17%) or solar panels (20%, 16%). All of these results were broadly consistent with 2015, when this question was added to the study.

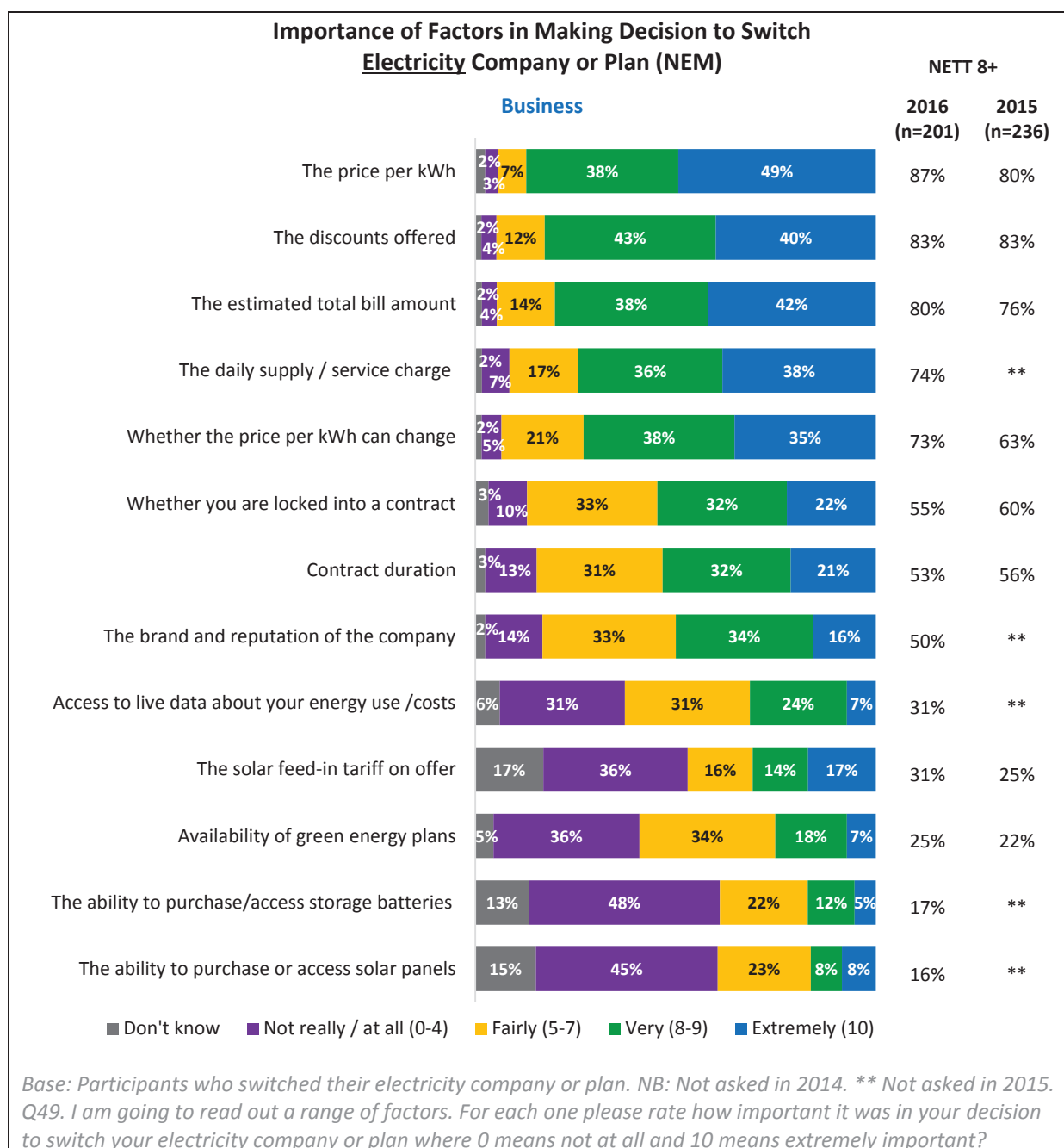
New and emerging technology related factors were added in 2016, yet only a small minority rated these as highly important, as shown in the charts over the next two pages.

For residential consumers with solar panels who had switched company or plan in the last five years (52% of those with solar), the most important factors were still the discounts offered (81% of them gave ratings of 8+) however a close second was the solar feed-in tariff (79%). Whilst not a top priority, the availability of green plans was also more important for those with solar panels (37%) than those without them (27%), as was the ability to purchase solar panels from the energy company (32% vs. 16%), and to purchase or access storage batteries from them (23% vs. 13%).

Consideration factors were similar for residential consumers *who had switched gas company or plan in the past five years*: discounts offered (85% compared to 80% in 2015) and the price per megajoule

(77% vs. 74% in 2015). Contractual factors were least important for these consumers: contract duration (56% vs. 61% in 2015) and being locked into a contract (56% vs. 61%).





In order to seriously consider switching their electricity provider or plan, residential consumers across all NEM jurisdictions (excluding Tasmania and rest of Queensland) indicated they would need to save an average of \$217 per year on their electricity bill, which is broadly on par with an average of \$207 in 2015. Results were also largely consistent across jurisdictions, with the lowest average saving required recorded among NSW consumers (\$202), rising to \$238 for consumers in South Australia.

Reflecting their larger bills, the minimum saving business consumers required on their electricity bills was higher than for residential consumers, averaging \$511 per year – a slight decrease from \$605 last year. Perhaps unsurprisingly, the average saving required also increased with the size of the most recent quarterly bill reported, among both residential and business consumers.

Results were similarly stable year-on-year among those with mains connected gas, with residential consumers requiring a minimum average saving of \$177 per year (vs. \$163 in 2015) and business consumers requiring \$325 per year (vs. \$249 in 2015).

Current Switching Behaviours and Intentions

Around half of consumers in the NEM jurisdictions with choice were currently seeking or interested in seeking a better deal, as were around four in ten in Tasmania and the rest of Queensland

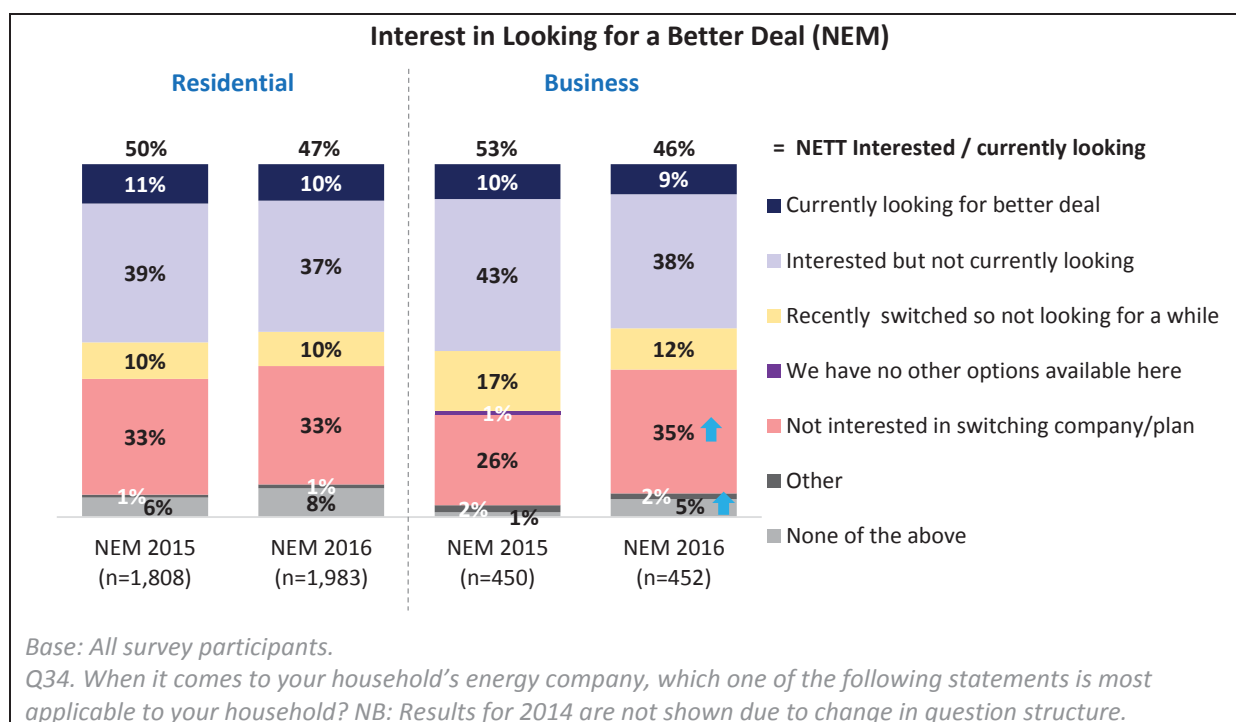
Consumer intentions regarding switching remained relatively consistent year-on-year, with around one in ten *currently looking for a better deal* (10% residential, 9% business) and a further four in ten *interested in switching but not currently looking* (37% residential, 38% business).

Looking at demographic and other sub-group differences, residential consumers significantly more likely to say they were *currently looking for a better deal or interested in switching* were:

- Male (51% vs. 44% of females)
- Aged under 55 years (52% vs. 40% of those aged 55+);
- Home owners (49% vs. 42% of renters);
- Earning higher household incomes of \$50k+ per annum (55% vs. 40% of those with lower incomes);
- Working on a full-time, part-time or casual basis (54% vs. 41% of those unemployed, retired or not working for other reasons);
- Those who had switched energy company or plan in the last five years (52% vs. 43% of those who have not);
- Those who had been approached in the last 12 months (53% vs. 44% of those who had not);
- Receiving high quarterly electricity bills of \$500+ (60% vs. 45% with a bill below \$500);
- Receiving high quarterly gas bills of \$300+ (61% vs. 47% with a bill below \$300);
- Self-assessed innovators or early adopters (61% vs. 41% of later adopters);
- Those who feel more comfortable taking risks in life (56% who gave themselves a 'willingness to take risks' rating of 8 or more out of 10 vs. 41% of those who were more risk averse);
- Already have or considering installing storage batteries in the next two years (60% vs. 44% of those who are unlikely to install them);
- Those considering installing solar panels (66% vs. 42% of those less likely to install solar panels); and
- Those with a university education (55% vs. 42% of those without a university education).

Around one in ten consumers had *recently switched* (10% residential, 12% business), while just over three in ten were *not interested in switching at all* (33% residential, 35% business – the latter up significantly from 26% in 2015).

Business consumers who were *not interested in switching at all* were more likely to have low quarterly electricity bills of less than \$500 (42% vs. 27% with bills of \$500 or over).



Looking at demographic and other sub-group differences, residential consumers who were significantly more likely to say they were not interested in switching were:

- Female (36% vs. 30% of males);
- Aged 55+ (40% vs. 29% of those aged under 55 years);
- Living in households without children (36% vs. 28% of those with children aged under 18);
- Not in paid employment (nett 39% vs. 30% of those in paid work or self-employed);
- Without tertiary qualifications (43% of those with only primary or secondary qualifications vs. 33% of those with college or TAFE qualifications and 27% of those with university qualifications);
- Earning lower household incomes of less than \$50,000 per annum (40% vs. 29% of those with higher incomes);
- Receiving low to medium quarterly electricity bills of less than \$500 (36% vs. 24% of those with bills of \$500+);
- Receiving low to medium quarterly gas bills of under \$300 (36% vs. 21% with a bill of \$300+);
- More risk-averse (37% of those who self-rated their willingness to take risks as 0-6 out of 10 vs. 24% who self-rated their risk willingness as 7-10);
- Self-assessed technology laggards or part of the late majority (nett 47% vs. 31% of those who are part of the early majority and 17% of those who are innovators or early adopters);
- Less internet-proficient (44% of those who rated their comfort with using the internet as 0-6 out of 10 vs. 32% of those who rated their comfort levels as 7 or higher);
- Unlikely to install solar panels in the next two years (37% vs. 20% of those who are likely to install them);
- Unlikely to install storage batteries in the next two years (38% vs. 21% of those who already have or will consider installing them);
- Those who had not investigated their energy options in the last 12 months (41% vs. 19% of those who had investigated); and
- Those who had not switched energy provider or plan in the past five years (42% vs. 25% those who had).

Despite limited options, four in ten consumers in Tasmania (38%) and the rest of Queensland (38%) were currently seeking or interested in seeking a better deal. Around a quarter in these jurisdictions were not interested in switching at all (25% in the rest of Queensland and 24% in Tasmania), while a fair few noted that they had no options available anyway (24%, 17%).

1.1.2 Consumer Outcomes

Introduction

To understand market outcomes, this section of the report details the findings on consumers’:

- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market;
- Satisfaction with the switching process among those who had done so;
- Consumer confidence that they can find the right information and make the right choice in the market; and
- Attitudes to switching.

The Results

Satisfaction with Retailers

Satisfaction with electricity and gas companies remained strong, with an increase in residential consumers being very satisfied with their electricity provider from the benchmark

To provide context to the consumer activity results, all survey participants were asked whether they were satisfied with their current energy companies. As illustrated over the page, around seven in ten consumers across the NEM were somewhat or very satisfied with their current electricity provider, including around a third who were *very* satisfied.

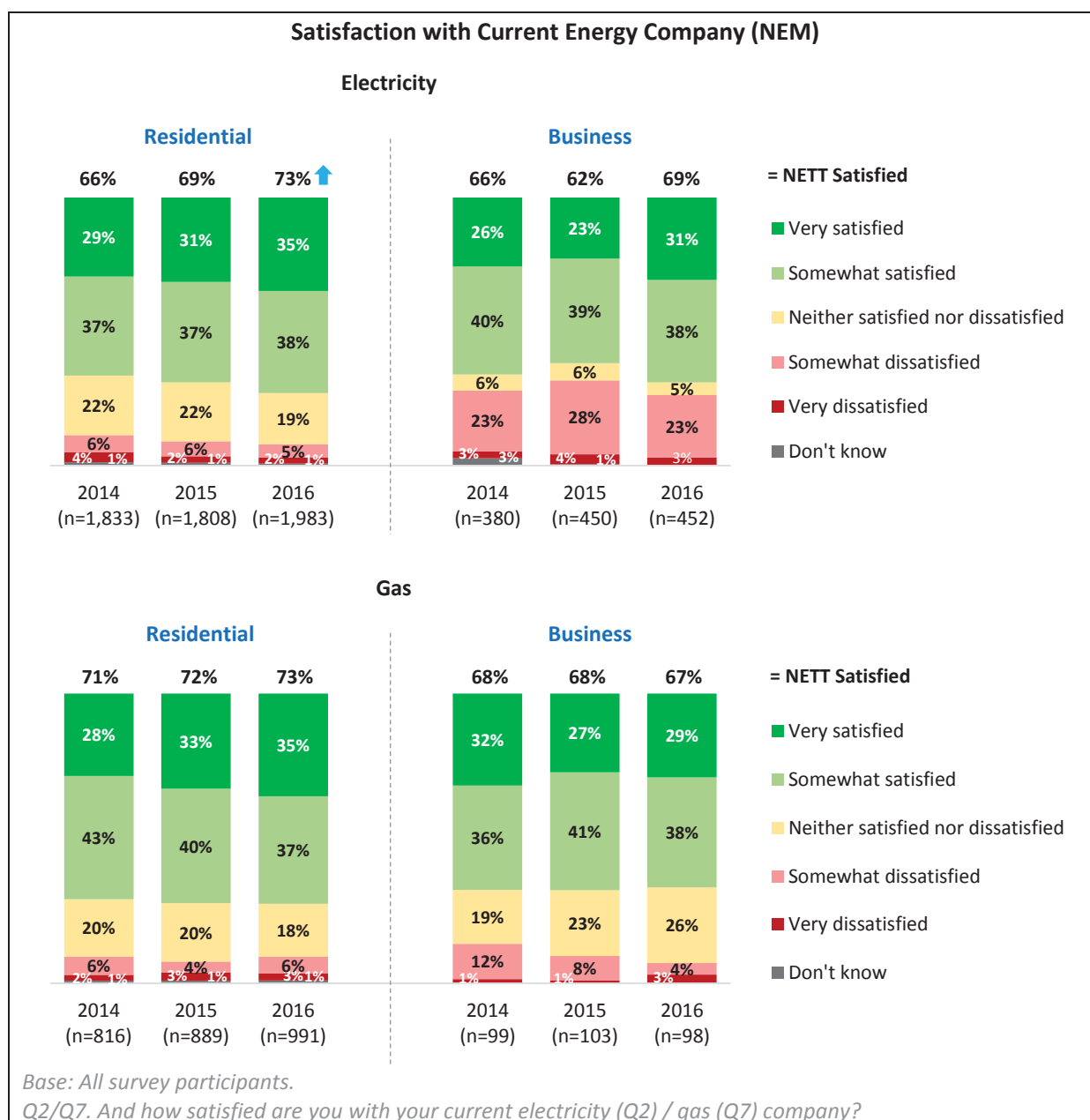
Among *residential* consumers, there was a significant increase in nett satisfaction with their electricity company compared with the 2014 benchmark (from 66% in 2014 and 69% in 2015, up to 73% in 2016). Whilst not a significant increase from 2015, satisfaction among business consumers rose to the highest levels to date (from 66% satisfied in 2014 and 62% in 2015, up to 69% in the current review).

The proportion of residential consumers who were somewhat or very satisfied with their electricity company was relatively consistent across jurisdictions, being the highest in South Australia (75%) and the lowest in South East Queensland (70%), though these differences were not statistically significant. Trends across jurisdictions were similar among business consumers, ranging from 74% in Victoria to 63% in NSW).

Satisfaction with current gas provider remained stable and strong among both residential consumers (71% in 2014, 72% in 2015 and 73% in 2016) and business consumers (68% in both 2014 and 2015 and 67% in 2016).

Whilst satisfaction among residential gas consumers was consistent across jurisdictions, *business* gas consumers in South Australia (85%) and the ACT (82%) were significantly more satisfied with their gas company than the NEM average (67%). The proportion of residential consumers reporting they were ‘very satisfied’ has increased year-on-year and is significantly higher compared to the benchmark year for both their electricity company (35%, up from 29% in 2014 and 31% in 2015) and for their gas company (35%, up from 28% in 2014 and 33% in 2015).

Notably, there were no significant differences in satisfaction among those who had switched energy company or plan in the last 12 months and those who had not. For example, for residential electricity companies, nett 71% of switchers were satisfied compared to 75% of non-switchers, and for gas companies, this was 71% and 74% respectively. Those who owned their own home were more satisfied than renters (nett 75% satisfied vs. 68% among renters), those with solar panels installed (77% vs. 72% without solar panels) and younger people (nett 78% of those aged 34 years and below were satisfied vs. 71% aged 35 years and over) and those who had investigated different energy offers and options (75% vs. 70% amongst those who had not).

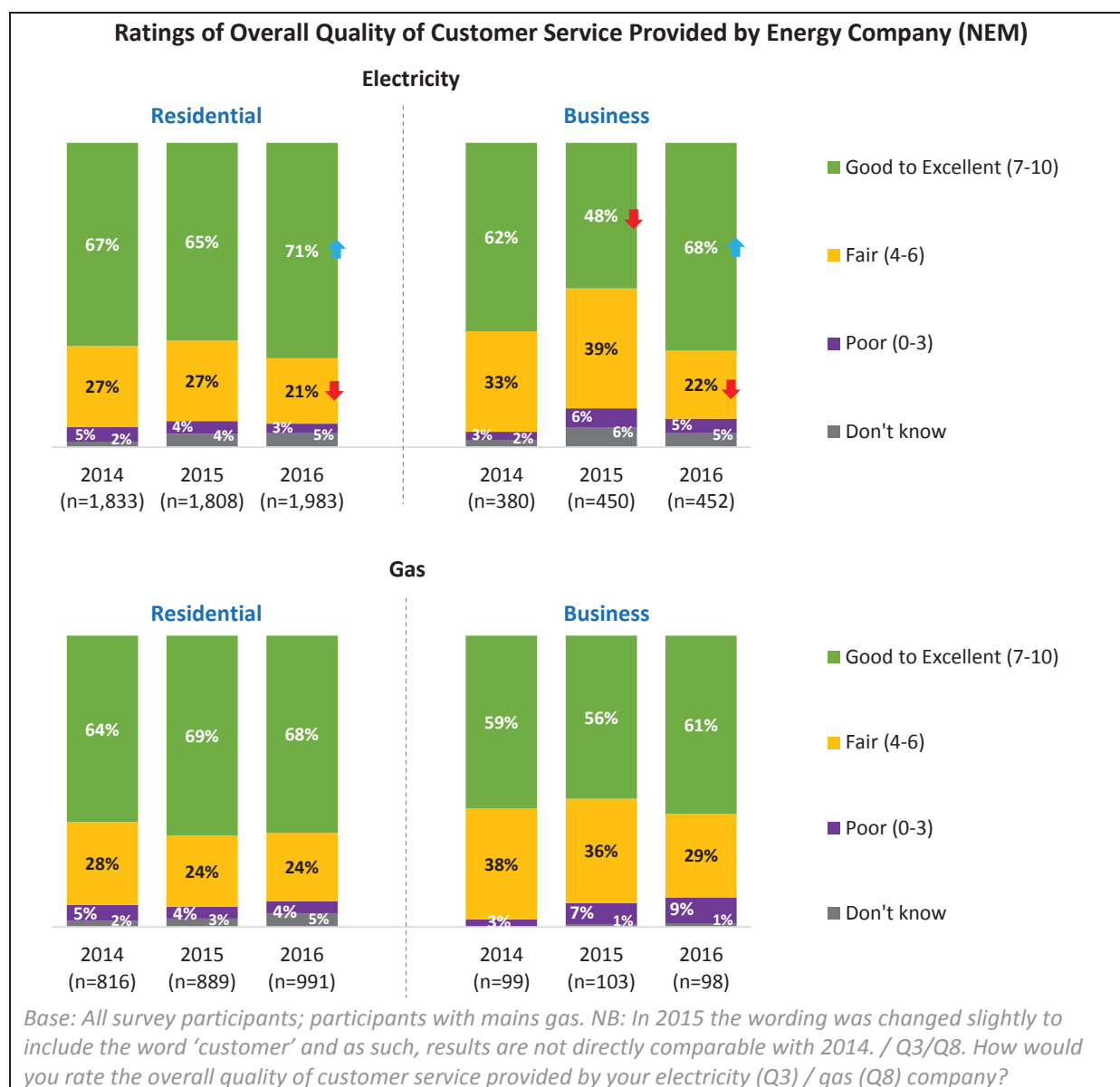


Perceptions of customer service and value for money from electricity companies have grown to their highest levels in the three years of this study

As shown in the chart over the page, when it came to the *overall quality of customer service* provided by their *electricity company*, there was a significant improvement from 2015. Around seven in ten *residential consumers* rated the overall quality of customer service as 7 or more out of 10 (71% vs. 65% in 2015) and a similar proportion of *business consumers* did so (68% vs. 48% in 2015).

Results among *residential gas consumers* were, however, broadly consistent year-on-year i.e. 64% provided a rating of 7+ in 2014, 69% in 2015 and 68% in 2016, and among *business consumers* (59% in 2014, 56% in 2015 and 61% in 2016).

Ratings of customer service were broadly consistent across jurisdictions for both gas and electricity residential and business consumers.



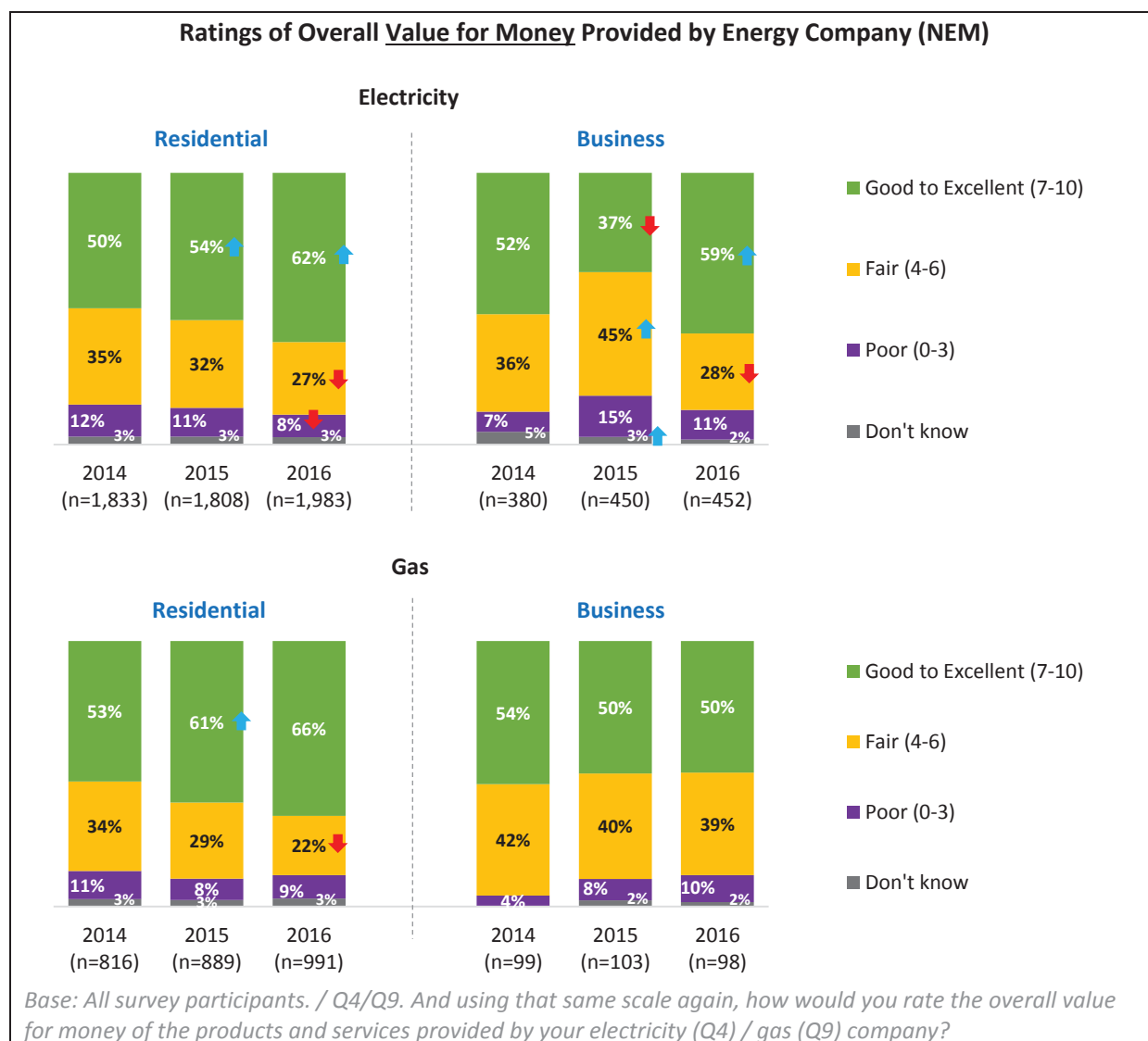
Consumer perceptions of the *value for money* provided by energy companies have improved over time, which is a trend that is also reflected across jurisdictions.

In the 2016 measure, 62% of residential consumers rated their *electricity* company's value for money as 7 or more out of 10 (up from 50% in 2014 and 54% in 2015), while 59% of business consumers gave the same ratings (up from 37% in 2015, and slightly higher than 52% in the benchmark year).

Ratings for value for money provided by their electricity company were consistent across jurisdiction. Interestingly, consumers with dual fuel (i.e. gas *and* electricity) gave higher ratings for the value for money provided by their electricity company (66% gave a rating of 7 or more) than consumers who only have (59%).

Ratings among residential consumers for the value for money provided by their *gas* company have shown improvement over time: i.e. up significantly from 53% giving a 7+ in 2014 to 61% in 2015, and improving even more to 66% in 2016. Among *business consumers*, half again rated their gas company's value for money as 7 or more (at 50% in both 2015 and 2016), slightly lower than ratings in the 2014 benchmark wave (54%).

Across jurisdictions, the ACT and rest of Queensland stand out for having a significantly lower proportion of *residential* consumers rating their *gas* company's value for money as 7 or more - i.e. 45% and 39% respectively, vs. the NEM average of 66%. It is worth noting that consumers in these jurisdictions were among the least happy with their level of choice.



Despite price related considerations being the main driver for switching, it is worth noting that there were no significant differences in value for money ratings between residential consumers who had switched energy company or plan *in the last five years* and those who had not. For example, while 62% of residential electricity switchers and non-switchers gave a rating of 7+ , for gas, 67% vs. 64% gave a high rating of 7+. Also for electricity company / plan switchers among *businesses*: 54% vs. 64% of non-switchers and 52% vs. 54% among gas consumers. However, ratings were *slightly* better among switchers.

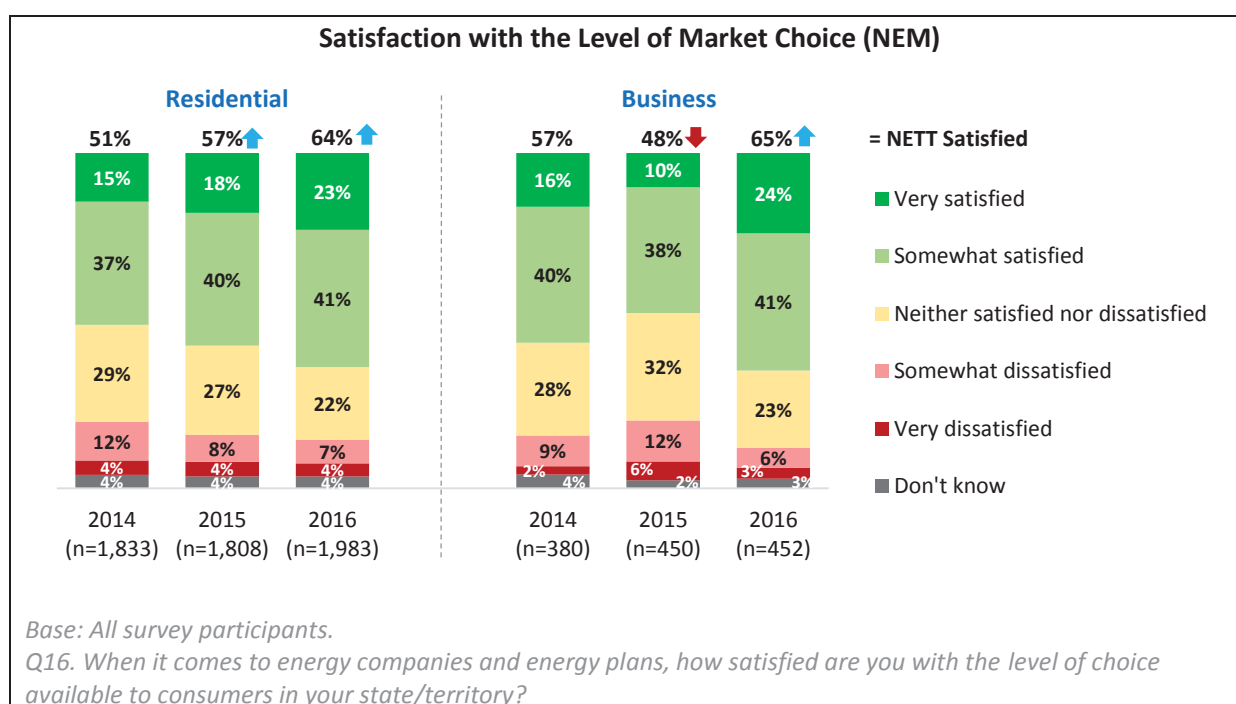
Those who reported that they were currently experiencing financial difficulty gave lower ratings for value for money (46% gave a rating of 6 or below) than those who were not experiencing such difficulty (32%). The two most vulnerable customer segments also gave the lowest ratings: The 45% of the Low Income segment rated their value for money as 6 or below, and 51% of the Mid-Income

segment. More detail about vulnerable customers is provided in the supplementary report, *Understanding Vulnerable Customer Experiences and Needs* (Newgate, 2016).

Level of Market Choice

Satisfaction with the level of choice in the energy market has improved across the NEM since the benchmark wave. Consumers in the ACT, Tasmania and rest of Queensland were the least satisfied, indicating that they would like more choice of energy companies and plans

Consumer satisfaction with the level of market choice in their state has improved significantly from the benchmark year among both residential and business consumers. Around two-thirds of residential consumers were somewhat or very satisfied with the level of choice in energy companies and plans – i.e. rising steadily from nett 51% in the benchmark, to 57% in 2015 and 64% in 2016. The same proportion of *business consumers* were satisfied in 2016 – i.e. 65%, which is significantly higher than both 2015 (48%) and 2014 (57%).



The same trend of increased satisfaction with choice is evident across all NEM jurisdictions with choice (i.e. excluding Tasmania and regional Queensland), as shown in the chart over the page. For business consumers there were no significant variances from the NEM results among jurisdictions.

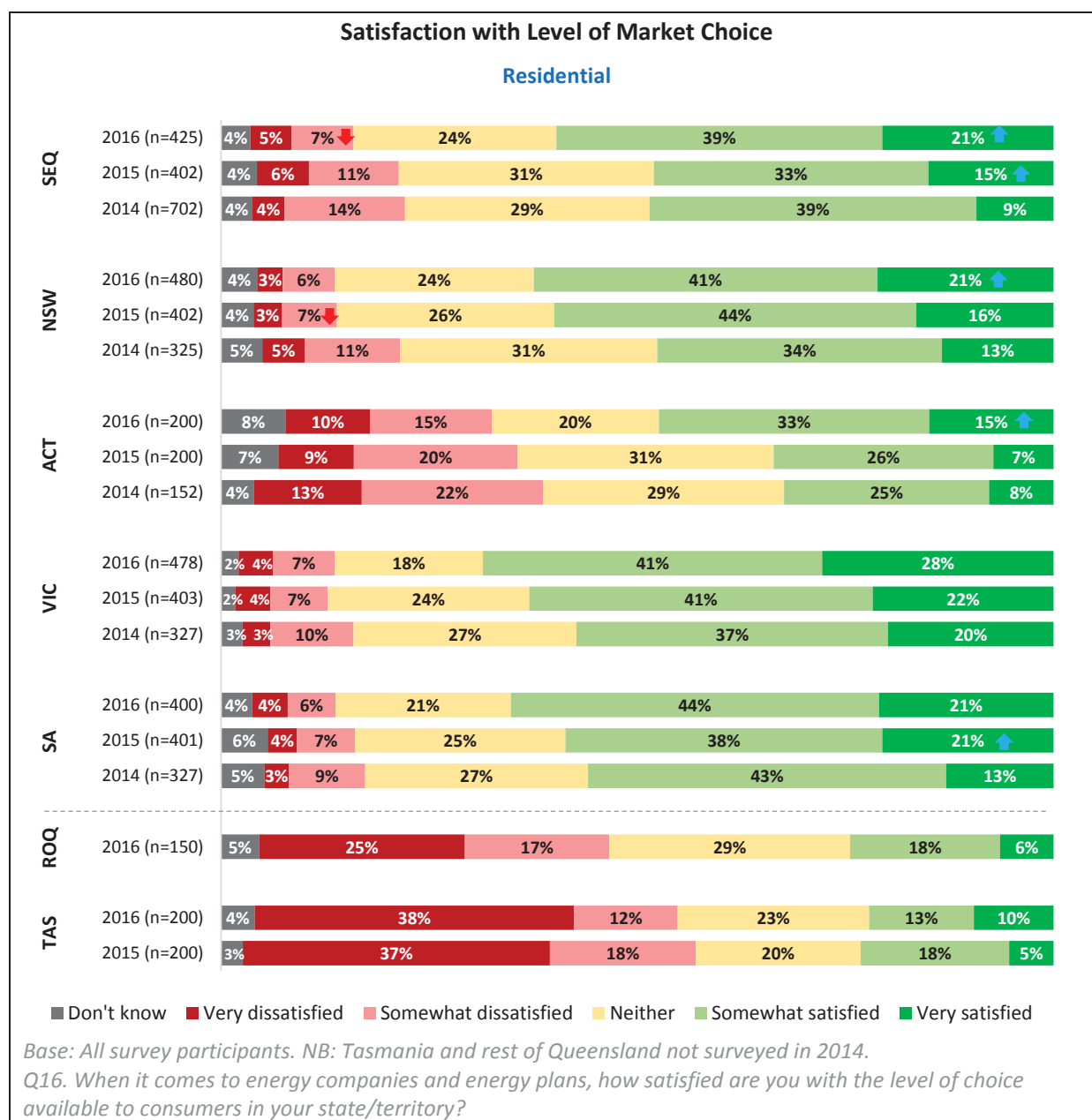
Comparing jurisdictions, those in the ACT were significantly more likely than others to report being somewhat or very *dissatisfied* (nett 25% vs. nett 11% across the NEM) while those in Victoria were more likely to be somewhat or very *satisfied* (nett 69% vs. nett 64% across the NEM).

In Tasmania and rest of Queensland, reflecting their limited choice of options, satisfaction with the level of market choice was also low among both residential consumers (Tasmania: nett 22% satisfied, rest of Queensland: nett 24%) and business consumers (15% and 22%, respectively). Indeed relatively large proportions were *very dissatisfied*; e.g. 38% of residential electricity consumers in Tasmania, and 25% in the rest of Queensland.

Consumers in Tasmania and the rest of Queensland were also asked how important having a choice of different electricity companies was for them. Results were similar across the two jurisdictions,

with the majority feeling it was very or extremely important, providing a rating of 8 or more out of 10 (residential: both at 59%, and businesses: 55% in Tasmania and 72% for rest of Queensland).

Choice of plans was also very or extremely important for the majority (residential: 55% in Tasmania and 60% in rest of Queensland, businesses: 42% and 68%).

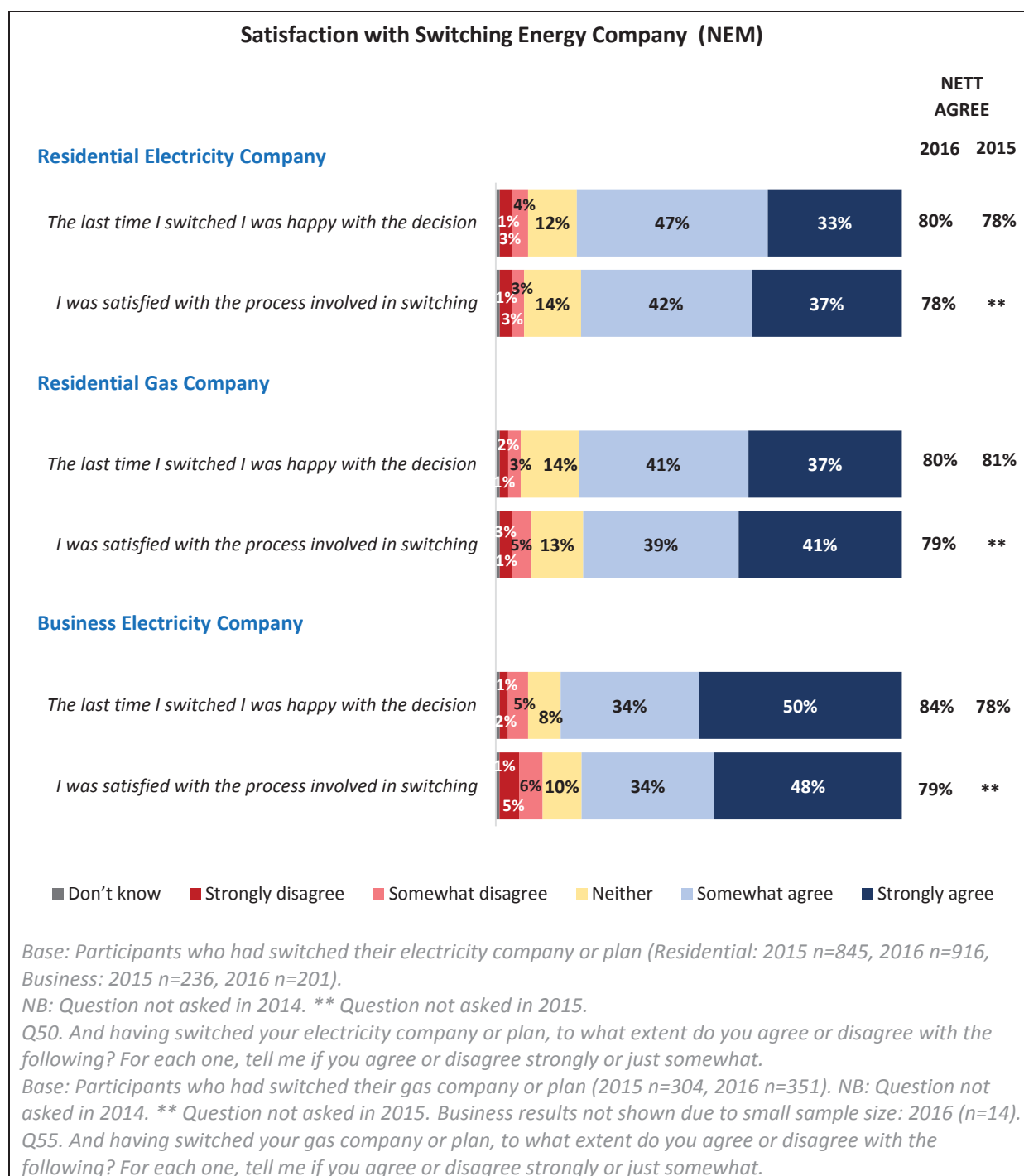


Satisfaction with Switching

Most consumers who had switched their electricity company or plan were happy with their decision and satisfied with the process involved

Consumers who had switched *electricity* plan or provider in the past five years were asked to rate their satisfaction with switching outcomes. The majority of *residential* switchers again agreed somewhat or strongly that they were satisfied with their decision to switch (nett 80% vs. 78% in 2015). Business switchers were more likely to agree with this than in 2015 (nett 84% vs. 78% in 2015). Similar levels of satisfaction were also observed among *residential gas consumers* who had switched (80% in 2016, vs. 81% in 2015).

A new question was asked in 2016 regarding the *process* of switching. Most residential consumers (nett 78%) and business consumers (nett 79%) agreed somewhat or strongly that they were satisfied with the process involved in switching *electricity* company or plan. Similarly, 79% of residential gas company of plan switchers were satisfied with the process involved in switching.



Price related reasons were by far the most common for being happy with their decision to switch

Reasons cited for being happy with the decision to switch electricity company or plan were consistent year-on-year and across consumer segments. Most commonly these were price related, such as discounts, incentives or reduced fees - i.e. nett 74% among residential consumers in 2016 vs. 77% in 2015, and 67% of businesses, down slightly from 78% in 2015.

Similarly, the majority of residential consumers who were happy with their decision to switch *gas* company or plan were most likely to cite price related reasons (70% in both 2015 and 2016).

Among residential consumers who had switched energy company or plan in the past five years, a small proportion disagreed that they were happy with their decision (nett 5%, down from 8% in 2015). This represented just n=50 residential consumers, with over half saying this was due to misleading discounts and prices (52%). This was also the main reason among the n=13 business consumers who were not happy with their decision to switch electricity company or plan and the n=20 residential consumers not happy with their decision to switch *gas* company or plan.

Confidence in Switching

In comparison with 2015, consumers were significantly more confident that they could find the right information to choose a suitable energy plan

Confidence in being able to find *the right information to choose a suitable energy plan* increased significantly from 2015. Around two-thirds of consumers were highly confident on this measure, giving themselves a rating of 7 or more out of 10 (63% residential, up from 54%; 68% of businesses, up from 46%). There were no significant variations between jurisdictions, though business consumers in the ACT were slightly less confident (56%). Residential consumers who were under the age of 34 were more likely to be confident that they could find the right information (68% vs. 61% of those aged 35+).

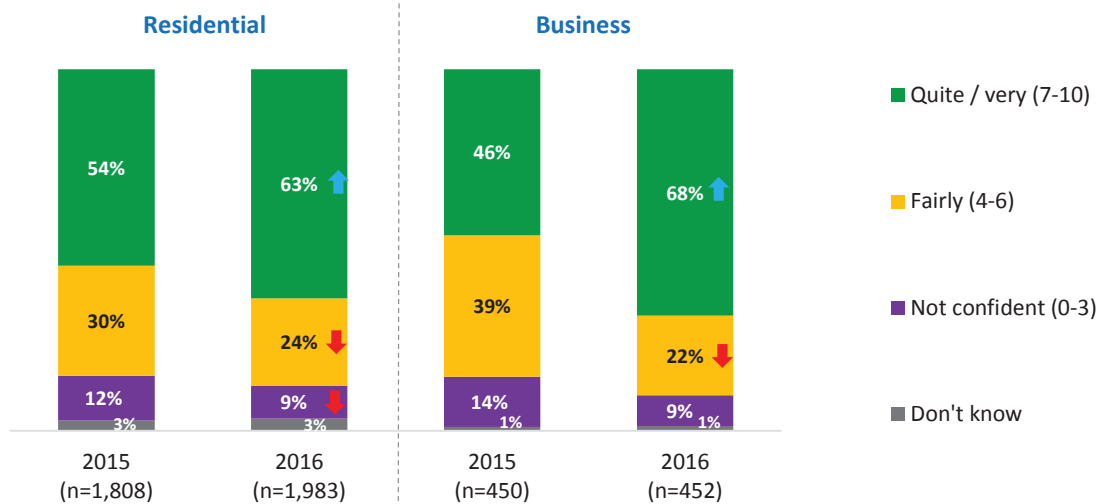
Notably, residential consumers who had used a price comparison website were significantly more likely to rate their confidence in finding the right information very highly, with 62% giving themselves an 8 or more out of 10, compared with 47% of those who had *not* used a price comparison website.

Results were similar for confidence in *actually choosing the right energy option* for one's household or business, with significant increases against 2015 among both residential and business consumers. The proportion of residential consumers rating their confidence as 7 or more out of 10 increased from 57% in 2015 to 63% in 2016. Business confidence increased even more, from 45% to 68%. No significant differences were observed between jurisdictions.

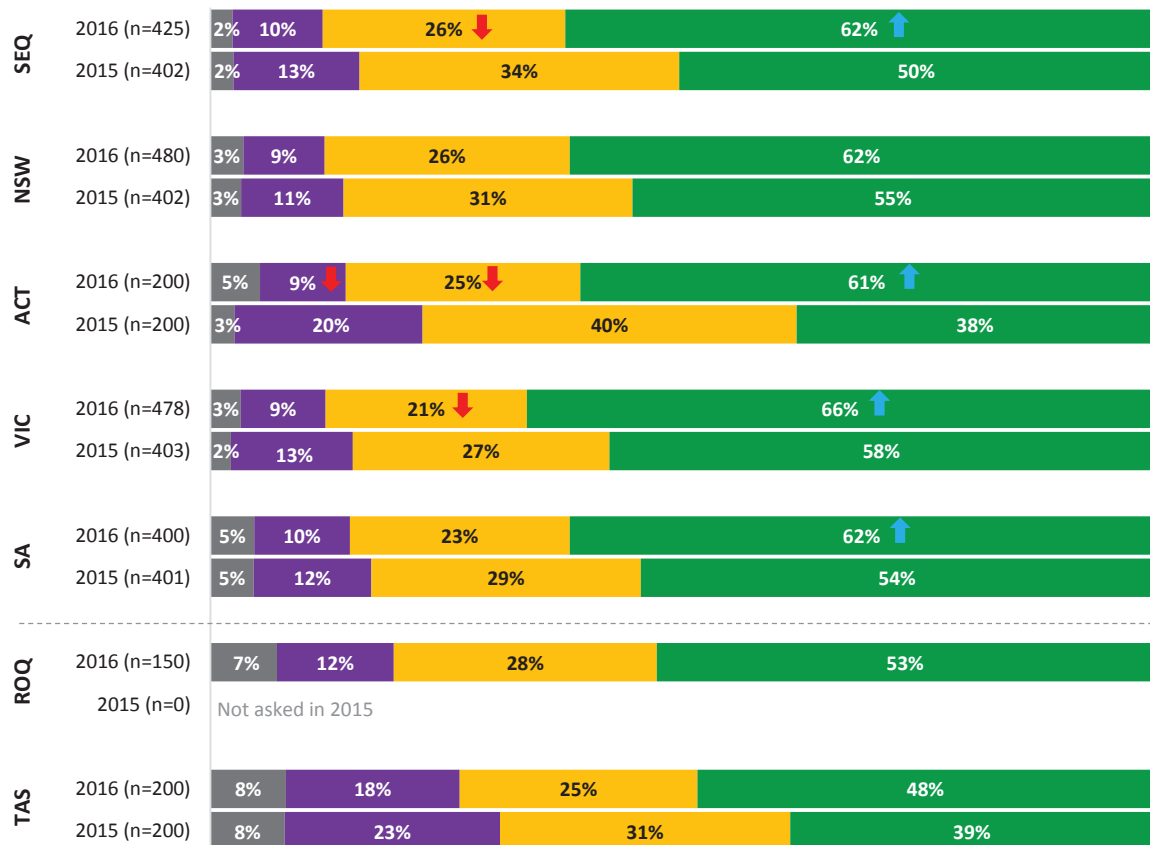
Confidence was also significantly higher among those with solar panels: 71% rated their confidence in finding the right information as 7+ vs. 61% of those *without* solar panels. Confidence was also higher amongst those who didn't currently have solar panels but were probably or definitely likely to install them in the next couple of years (77% vs. 59% of those who said they might, probably or definitely won't install them). These results provide further evidence of those with or highly interested in solar panels being more engaged with the energy market.

Among residential consumers, confidence was lower (a rating of a 3 or below) for those in regional areas (11% vs. 7% in metropolitan areas giving a confidence rating of a 3 or below) and younger consumers (4% among those under 35 years vs. 9% among those 35 and over).

Level of Confidence in Finding the Right Information to Choose a Suitable Energy Plan (NEM)



Residential (Jurisdictions)



Base: All survey participants. NB: The question wording was changed in 2015 and as such, results are not directly comparable with 2014.

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.

Attitudes to Switching

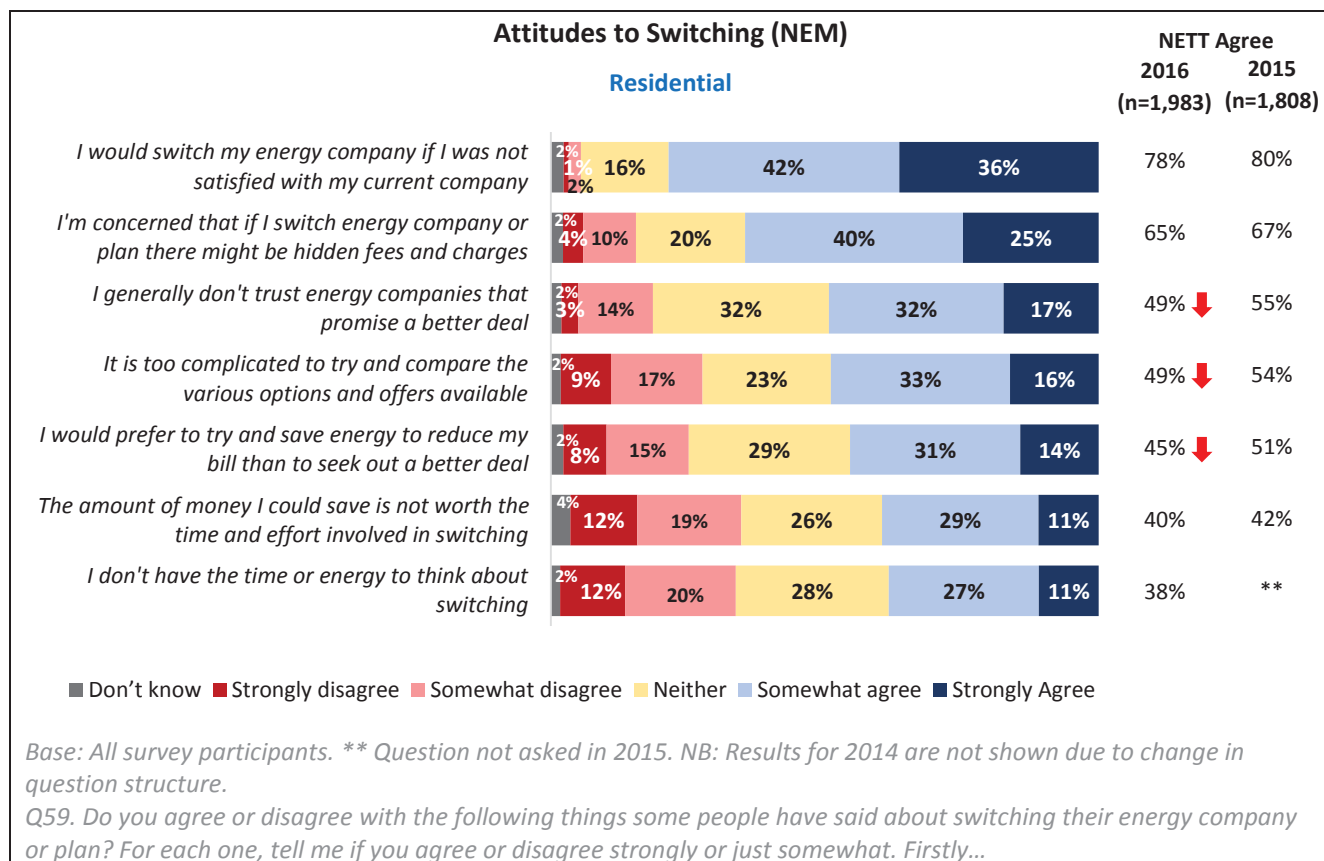
Consistent with findings across jurisdictions and over time, the majority of consumers agreed they would switch if they were not happy with their current company yet were concerned about hidden fees and charges if they did switch

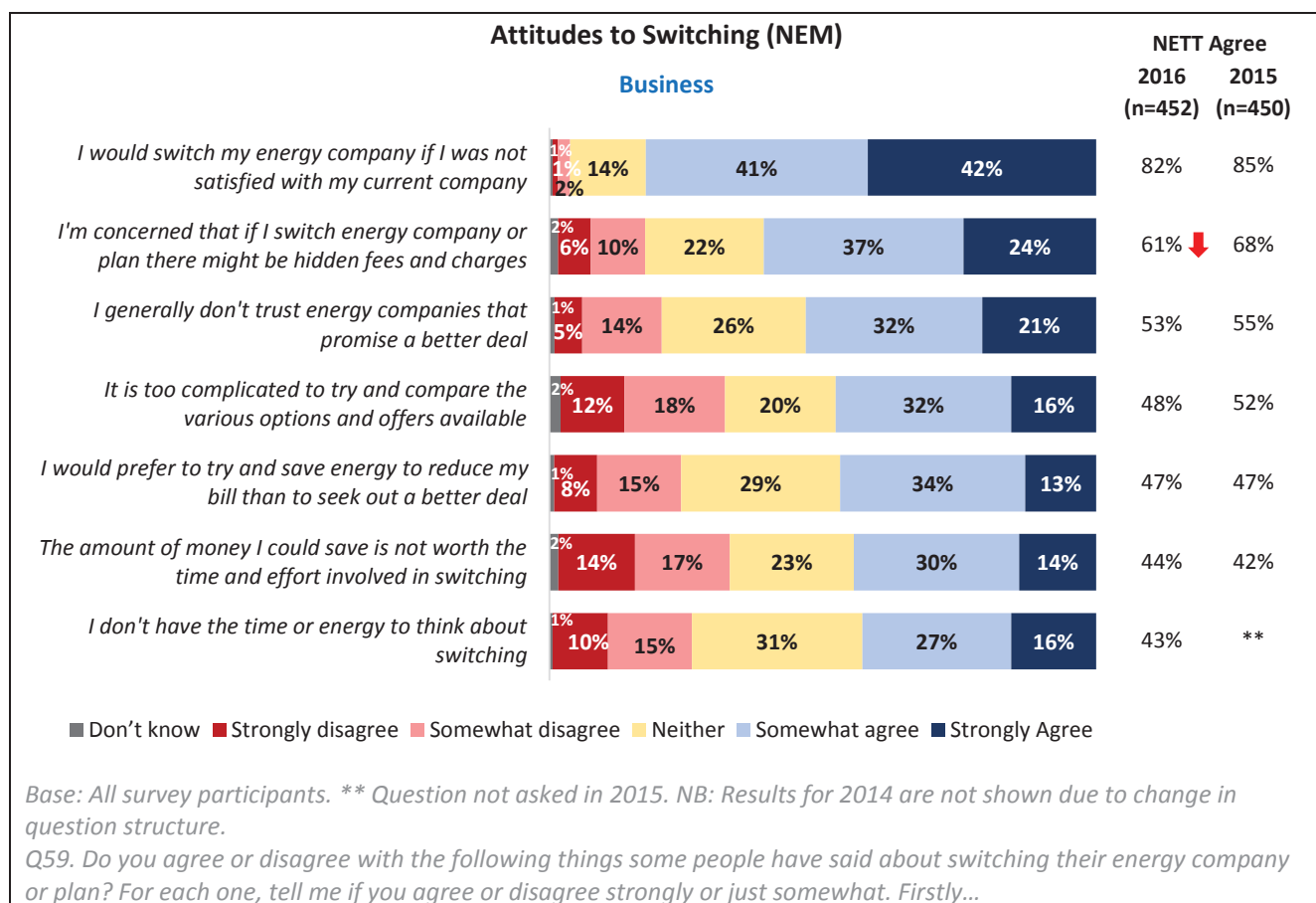
Consistent with attitudes in 2015, around eight in ten consumers in the NEM agreed strongly or somewhat that they would switch energy company if they were not satisfied with their current company (residential: nett 78%, businesses: 82%).

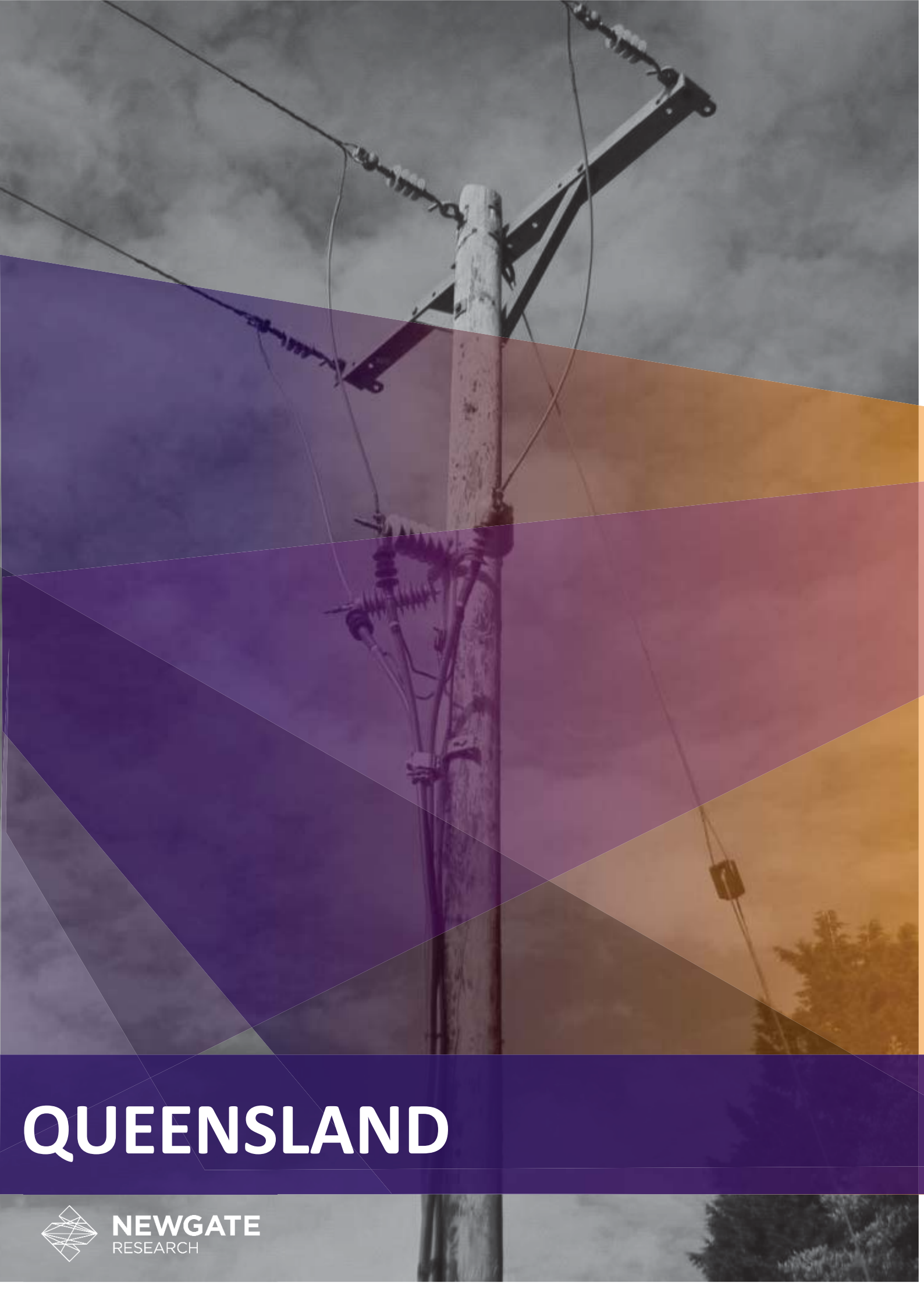
Around two thirds (65%) of residential consumers were, however, concerned about hidden fees and charges if they were to switch, and a similar 61% of business consumers (down significantly from 68% in 2015 – results are charted over the page). Those who were more likely to be concerned about hidden fees i.e. somewhat or strongly agreeing with the statement included those indicating higher levels of vulnerability:

- Those experiencing financial difficulty (72% vs. 64% among those not experiencing financial difficulty);
- Single parents (74% vs. 65% who were not single parents);
- Those with a special payment arrangement with their energy provider (79% vs. 64% among those who don't);
- Those with someone in the household with a chronic illness or disability (70% vs. 64% those who don't); and
- Those who find it hard to understand information about financial matters (80% vs. 62%).

There was a significant decline in residential consumers agreeing that they don't generally trust energy companies that promise a better deal (55% in 2015 down to 49% in 2016), that it is too complicated to try to compare the various offers and options (54% down to 49%) and that they would prefer to save energy than seek out a better deal (51%, down to 45%).







QUEENSLAND



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2 Queensland

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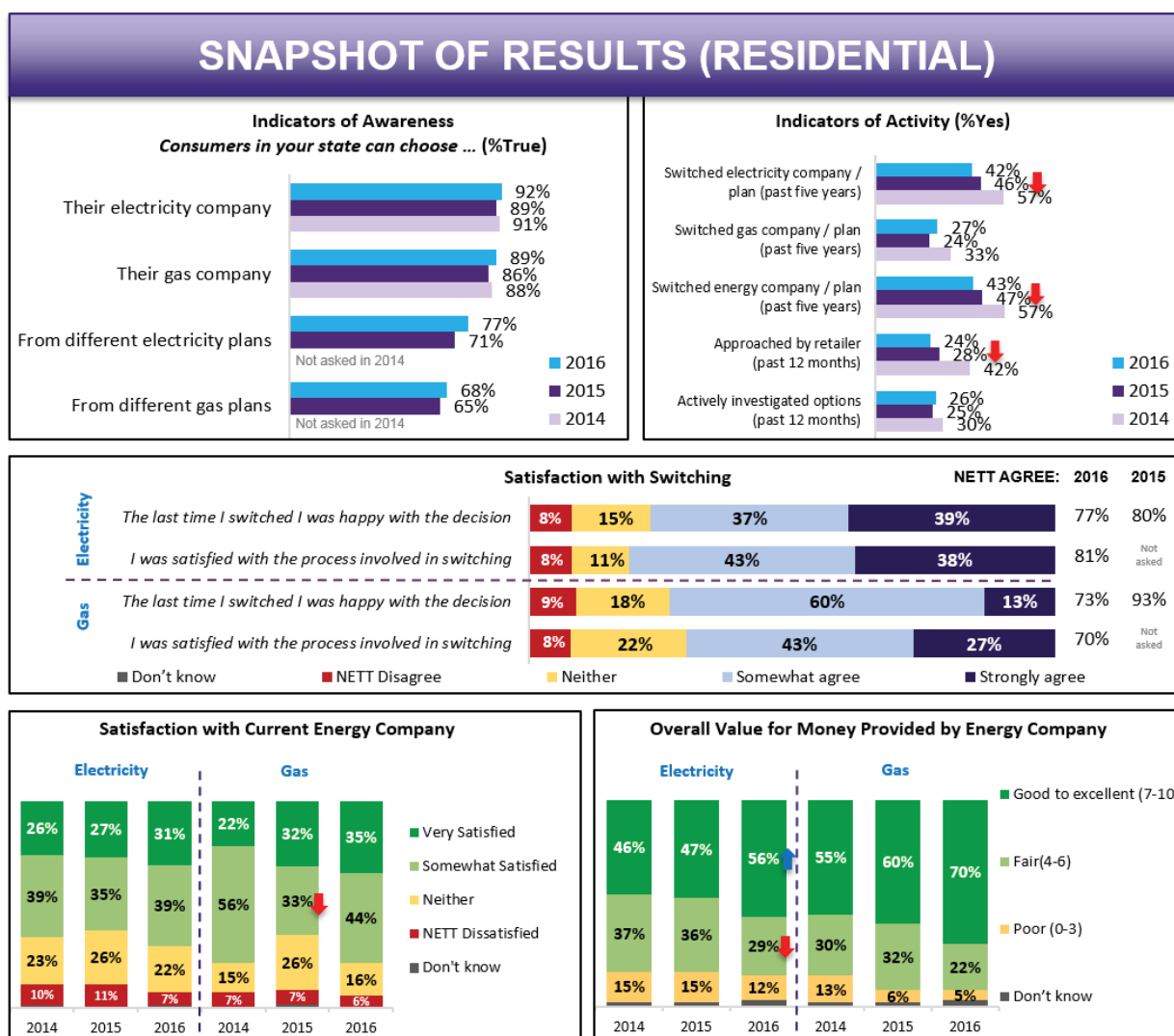
2A: South East Queensland

2A.1 Snapshot of Results

South East Queensland consumers' awareness of their ability to choose from different companies and offers in the energy market remains high. Satisfaction with the level of market choice has increased significantly to 60% nett satisfied, from 49% in 2014. Confidence was significantly higher this year, with more consumers confident they could find the right information about energy offers and deals, and actually choose the right option for their situation. Further, significantly fewer residential consumers agreed that *it is too complicated to try and compare the various options and offers available and I would prefer to try and save energy to reduce my bill than to seek out a better deal*.

Switching rates have continued to decline in this jurisdiction, although only slightly since 2015, coinciding with fewer direct approaches by energy companies. The biggest motivators for switching remain price and discounts. Compared to 2015, a significantly higher proportion of *consumers who had switched electricity company or plan* reported that they used a comparison website, with a slight increase in mentions of them being the most useful information source. However, they are using commercial sites such as iSelect or Compare the Market as very few know of the government site.

Looking ahead, around half of those surveyed were again either seeking or interested in seeking a better deal. In line with 2015 results, most consumers agreed they would switch energy company if they were not satisfied with their current company (78% residential and 82% of businesses surveyed).



2A.2 Key Findings

2A.2.1 Consumer Activity

Introduction

This section of the report details findings about South East Queensland consumers’:

- Awareness and knowledge of their options in energy markets;
- Incidence and time spent investigating energy deals and offers in the last year;
- Reasons for *not* investigating different offers and options;
- Reported ease of comparing different offers and options;
- Used and preferred information sources for investigating different offers and options;
- Awareness of comparison websites – unprompted and prompted;
- Rates of switching energy company, plan and/or deal and the incidence of sales approaches from energy companies;
- Reasons for consumers not switching energy company or plan after investigating their options;
- Drivers: unprompted motivations and the level of importance of various factors in the decision to switch company/plan, and dollar savings needed for consumers to seriously consider switching; and
- Current behaviours – whether currently looking or interested in seeking a better deal.

The Results

Most consumers remained aware they could choose from different energy companies and plans

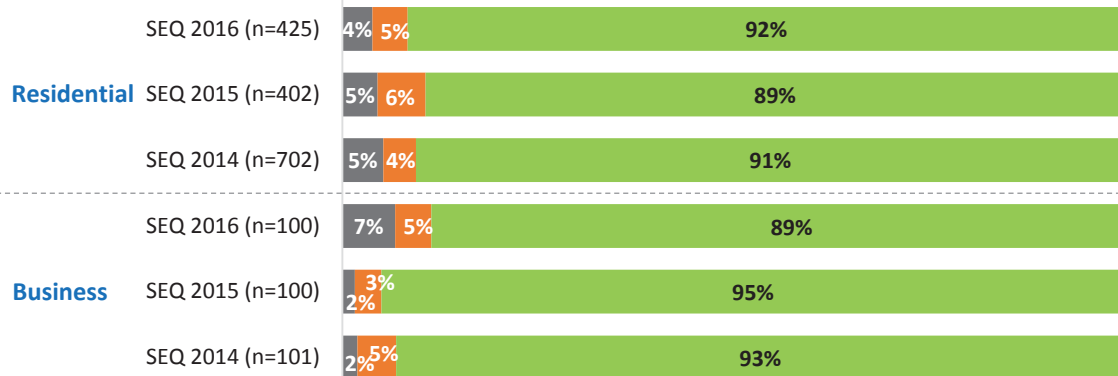
As charted on the following page and in line with previous years’ results, the vast majority of consumers surveyed in South East Queensland were aware that they could choose their electricity company (residents: 92%, businesses: 89%), or their gas company (89% of residents).

As was the case in 2014 and 2015, awareness of being able to choose between different energy *plans and offers* was lower than awareness of being able to choose from different companies. Around eight in ten consumers surveyed were aware that they could choose different electricity plans (residential: 77%, small businesses: 79%), and even fewer residential consumers were aware they could choose from different *gas* plans and offers (68%).

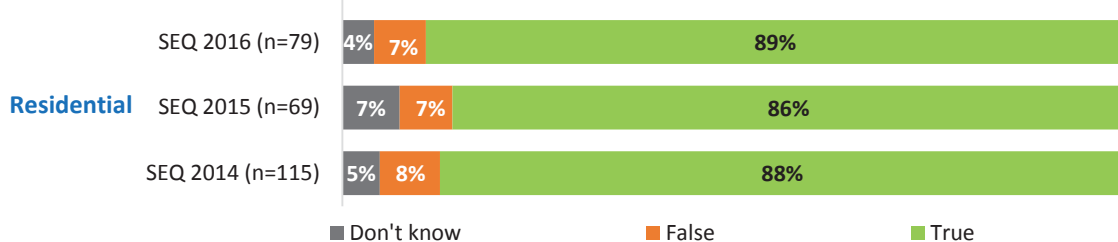
Results for business gas consumers are not charted due to small sample sizes of less than n=30 in each year.

Awareness of Ability to Choose Energy Company (South East Queensland)

Consumers can choose their electricity company



Consumers can choose their gas company

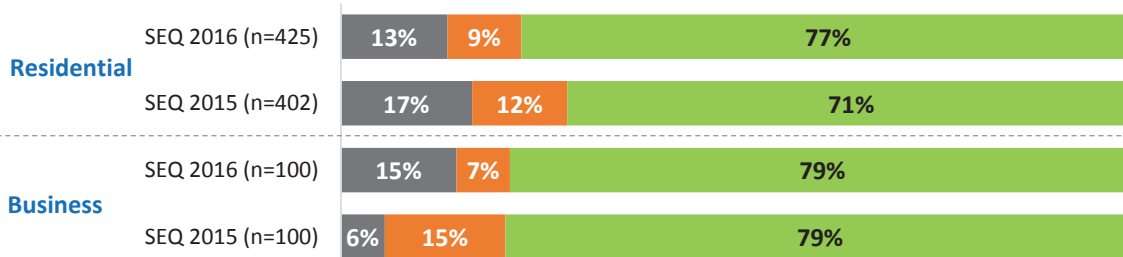


Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample size: 2016 (n=10), 2015 (n=9), 2014 (n=7).

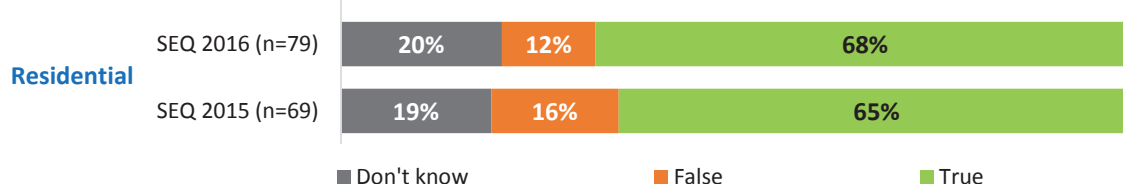
Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state can choose their electricity company. b) Consumers in your state can choose their gas company.

Awareness of Ability to Choose From Different Energy Plans, Offers Etc. (South East Queensland)

Consumers can choose from different electricity plans and options



Consumers can choose from different gas plans and options

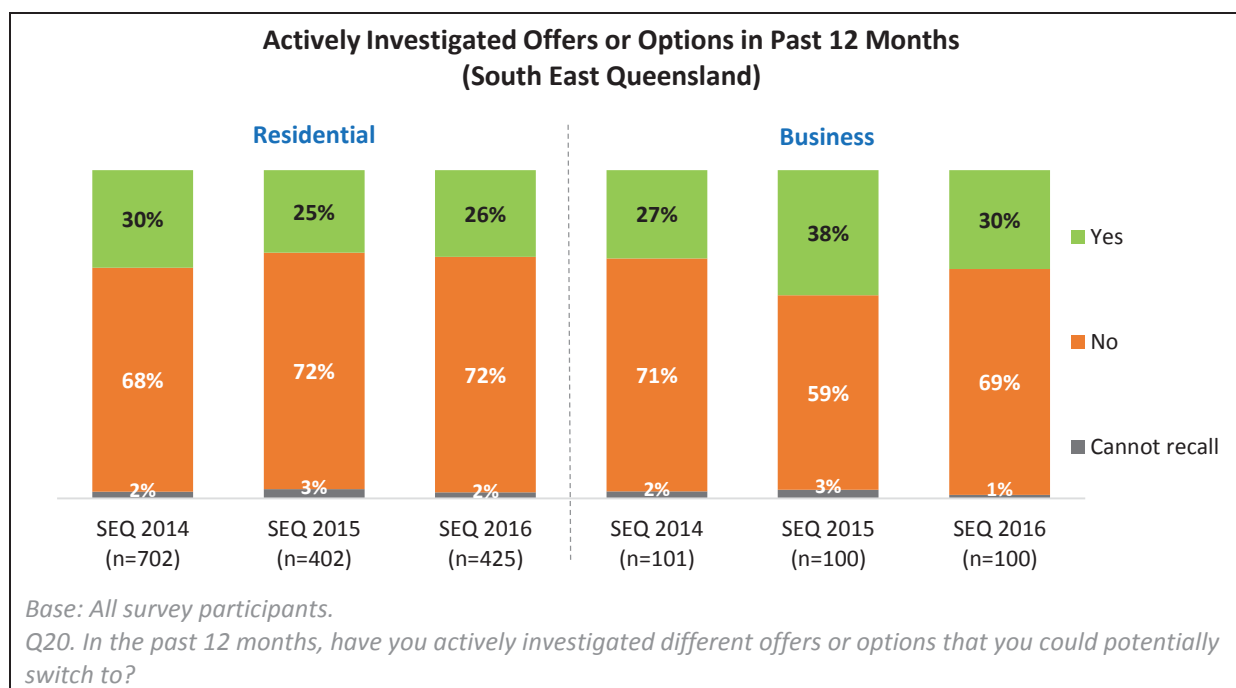


Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample size: 2016 (n=10), 2015 (n=9).

Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state can choose from a range of different types of electricity plans, price structures, contract lengths and terms. d) Consumers in your state 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.

The proportion of consumers who had actively investigated offers or options in the last 12 months has remained relatively stable

In line with previous years' results, just over a quarter of residential consumers (26%) had actively investigated offers or options that they could potentially switch to. Although not statistically significant, there was a slight decrease in active investigation among small business consumers (down from 38% in 2015 to 30%) but this is still slightly higher than in the 2014 benchmark (27%).



The most common reason for consumers not to have investigated options was that they were satisfied with their current situation, which returned to benchmark levels after a dip in 2015

Reasons for *not* looking into energy options or switching were explored to understand barriers to consumers engaging with the competitive market.

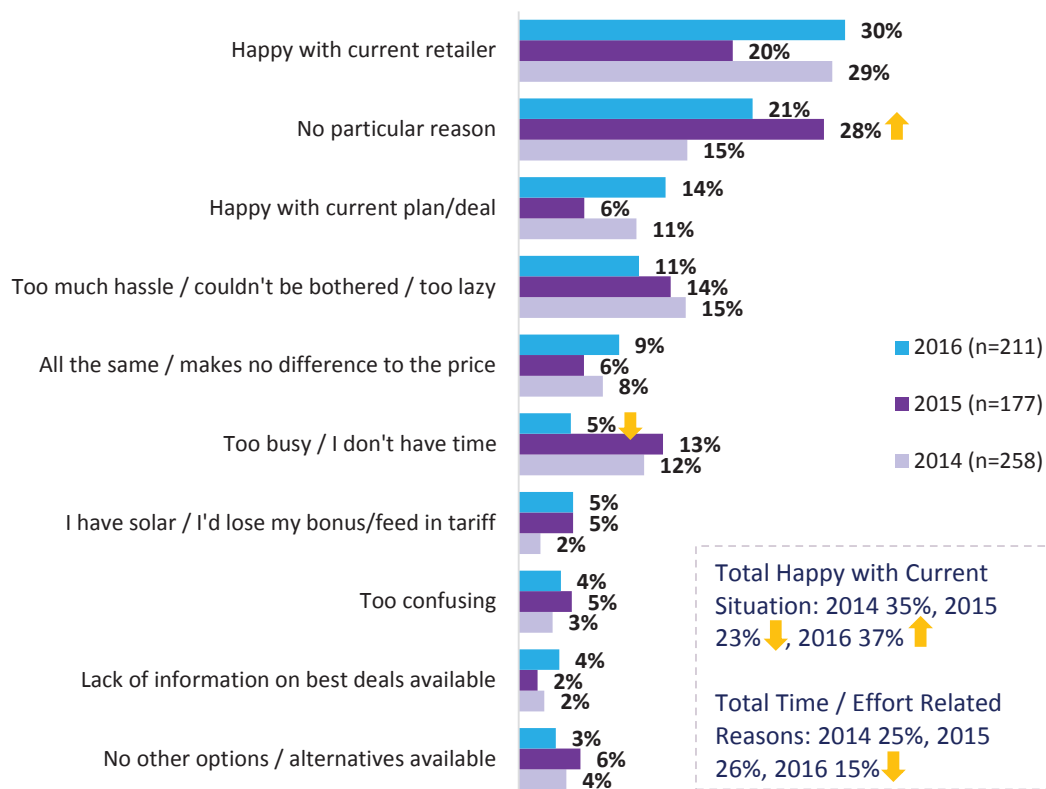
Among *residential* consumers who had *not* investigated options or switched provider or plan, the main unprompted (and subsequently manually coded) reasons were that they were happy with their current retailer (at 30%, in line with the 29% benchmark after a slight drop to 20% in 2015), or were happy with their current plan / deal (at 14%, similar to the benchmark of 11% in 2014).

Lower level reasons included it being too much of hassle / couldn't be bothered (11%) and a belief that it would make no difference to the price because *all plans and companies are the same* (9%). The incidence of these responses was broadly in line with previous years.

A lack of time was less of a barrier this year, with significantly fewer residential consumers claiming this as a reason for not looking into their options (at 5%, down from 13% in 2015 and 12% in 2014).

Main Reasons for Not Investigating or Switching (South East Queensland) Unprompted, Top Mentions 3%+

Residential



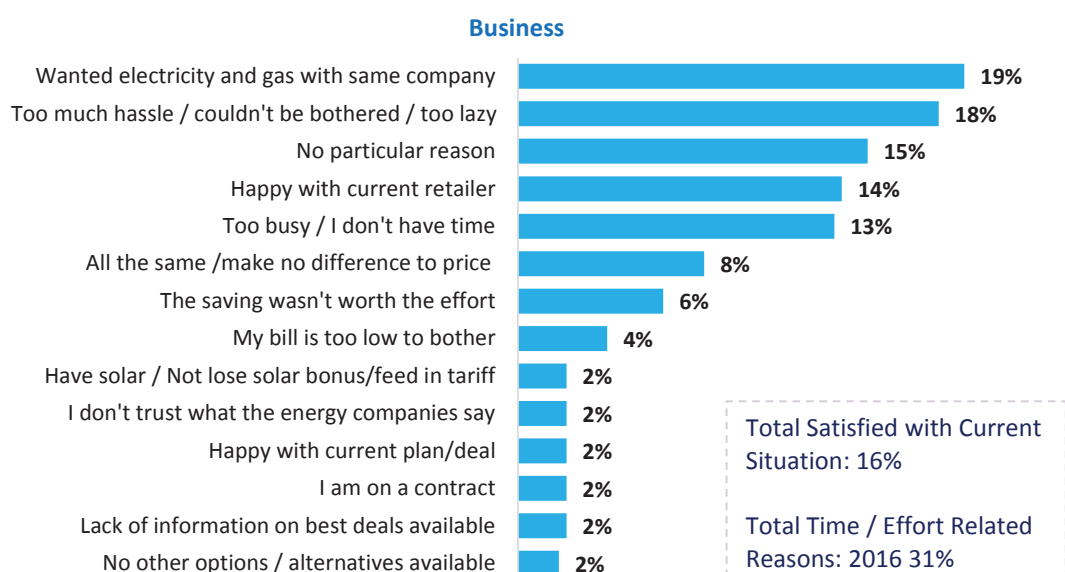
Base: Participants who had not investigated offers and options or switched in the past 12 months.

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.

As the chart over the page shows, among *business* consumers who had neither investigated options nor switched provider or plan, the main reason was that they wanted a provider that offered both electricity and gas (19%). Whilst 2015 results are not shown due to a small base size (n=29) other reasons for not switching remained broadly consistent with the top themes last year – i.e. too much hassle / couldn't be bothered (18% in 2016), or being happy with their current retailer (14%).

As was the case among residents, fewer small business consumers claimed that a lack of time was a barrier to investigating or switching; at 13% in 2016, down from 25% in 2015 (this is not statistically significant, likely due to the small samples).

Main Reasons for Not Investigating or Switching (South East Queensland) Unprompted, Top Mentions 2%+



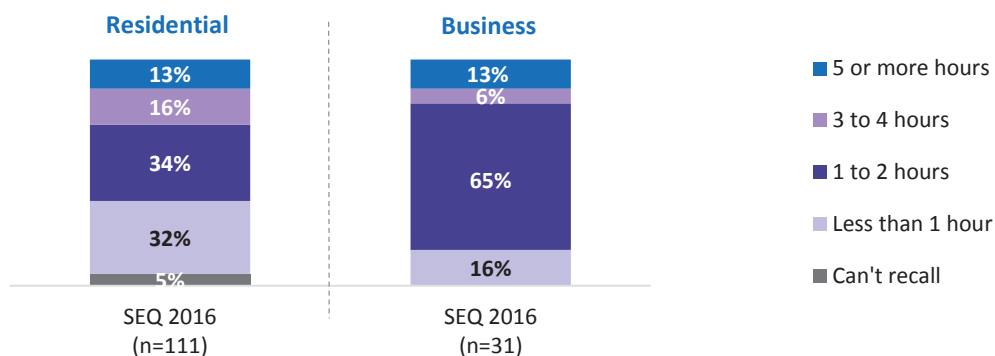
Base: Participants who had not investigated offers and options or switched in the past 12 months (n=51).

NB: 2014 and 2015 results not shown due to small sample sizes: 2014 (n=16), 2015 (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? MULTIPLE RESPONSE.

The majority of consumers who did investigate energy offers and options they could switch to estimated that they spent no more than two hours doing so (residential: nett 66%, businesses: 81%).

Time Spent Investigating Offers or Options (South East Queensland)



Base: Participants who investigated switching.

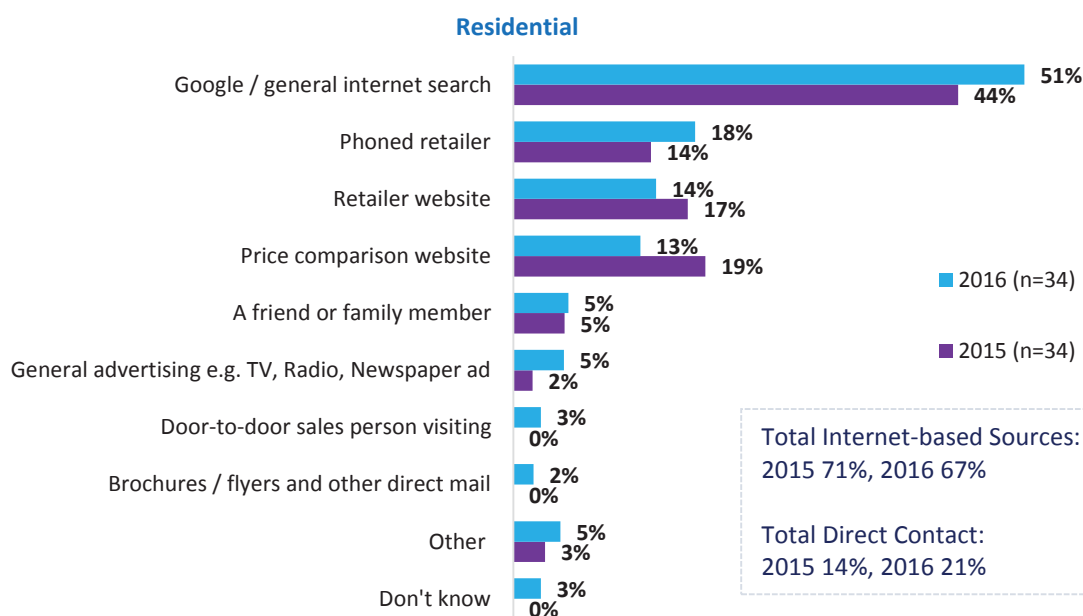
Q20b. The last time you investigated energy offers or options, how long did it take you to do this?

Among residential consumers who had investigated their options but did not go on to switch, the main information source used was again Google or other general internet-based searches (51% vs. 44% in 2015). Secondary information sources were very consistent with 2015 and included telephoning retailers (18% this year), visiting retailer websites (14%) or price comparison sites (13%).

These participants who investigated but did not switch were then asked what the most useful information sources were for helping them to decide. In line with 2015 results, the most useful information sources were consistent with the most popular sources and included Google or general internet-based searching (25%), phoning a retailer directly (16%) and price comparison websites

(13%). Although not statistically significant due to small sample sizes, in 2016 residential consumers were more likely to find a direct phone call to retailers most useful (16%, up from 5% in 2015) and less likely to find a visit to retailer websites most useful (3% down from 9% in 2015).

Main Information Sources Used to Investigate Different Offers and Options (South East Queensland) - Unprompted

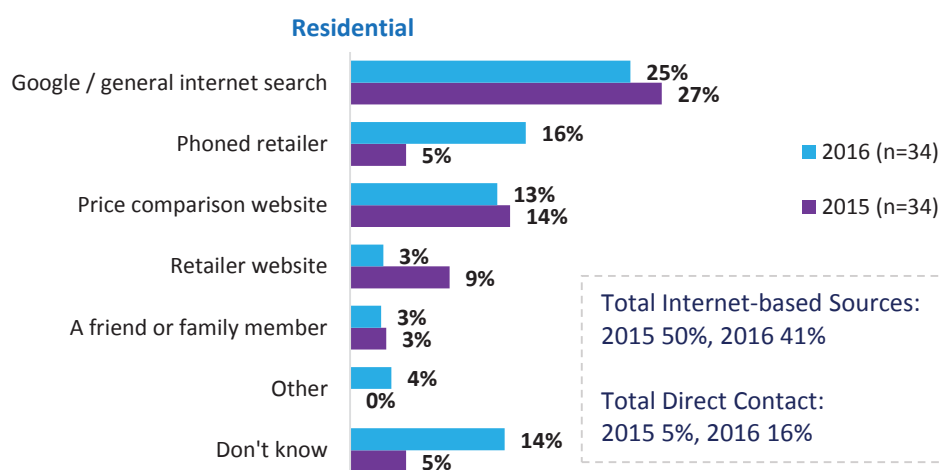


Base: Participants who had investigated offers or options but had not switched.

NB Business results not shown due to small sample size (n=11).

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.

Most Useful Information Source Used to Help Decide Whether or Not to Switch (South East Queensland) - Unprompted



Base: Participants who had investigated offers or options but had not switched.

NB: Question not asked in 2014. Business results not shown due to small sample size (n=11).

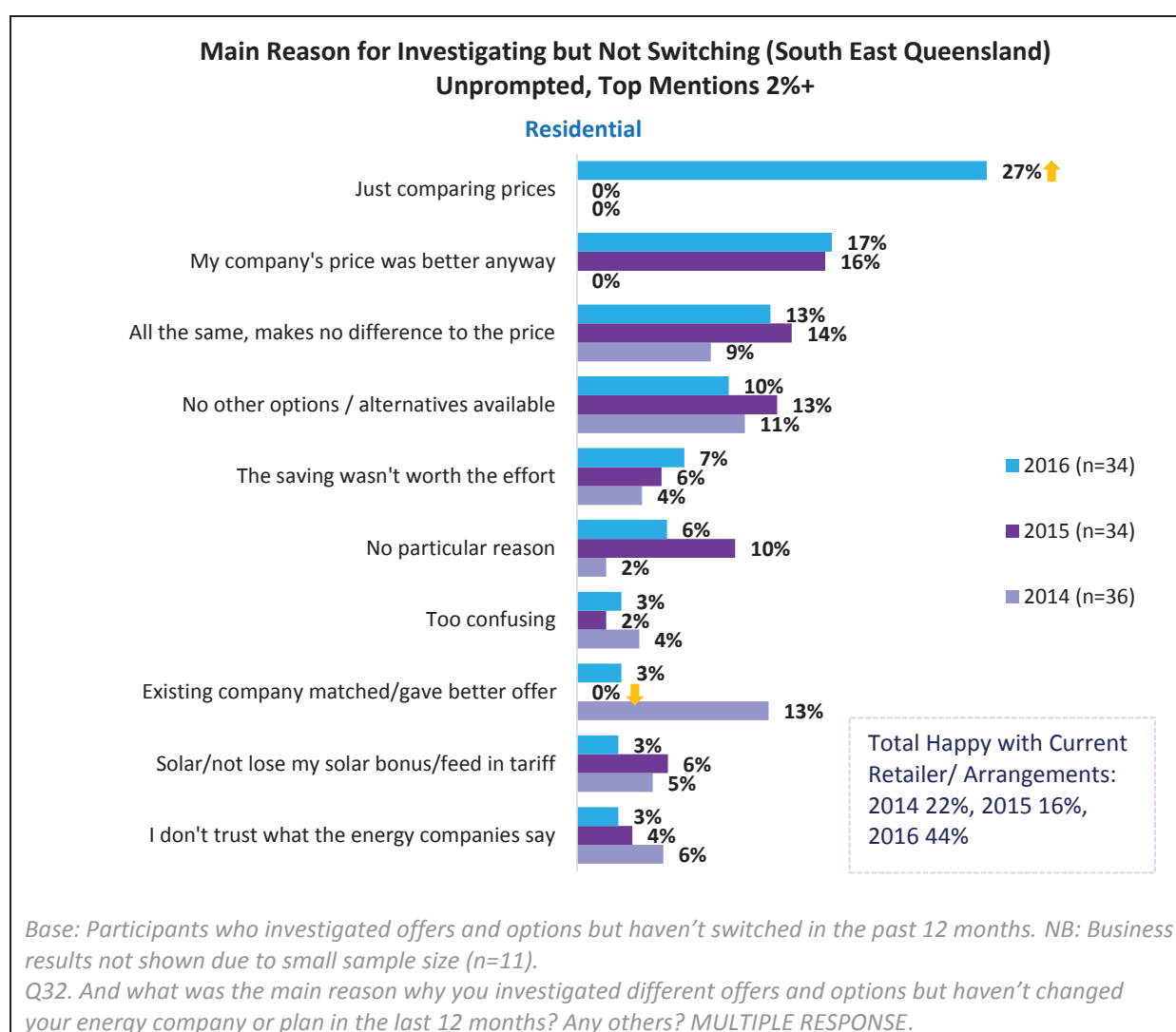
Q57. And thinking about the information sources you used when investigating different offers or options, which one was most useful in helping with your decision whether or not to switch?

The main reason for not switching after comparing energy offers remains a lack of value proposition

Among *residential* consumers who had investigated offers but didn't switch, there emerged a new main reason: 'just comparing prices' (27%). While this is statistically significant, the small sample size potentially inflates the importance of this change and actually represents just n=9 participants. In previous years, as the incidence was low, mentions within this theme were included in 'other responses'.

There were no significant changes in secondary reasons, which included finding that their own company had a better price (17% in 2016), the perception that all companies would offer the same price (13%) or that there are no other options or alternatives available (10%).

In total, a nett of 44% of these consumers indicated that they didn't switch because they were happy with their current retailer or arrangements, which is somewhat higher than in previous years (though not statistically significant due to the small sample sizes).

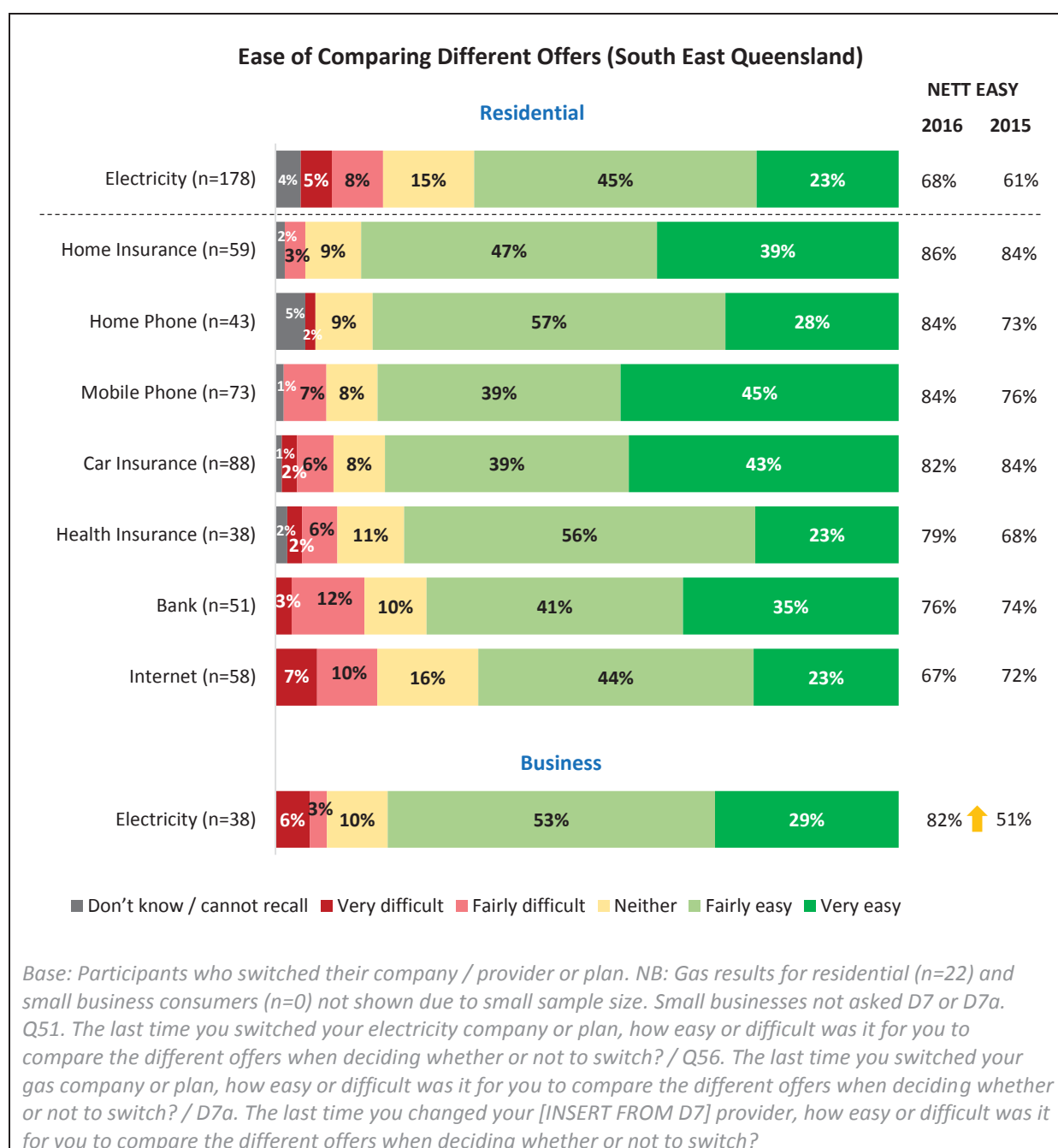


The majority who switched found it easy to compare offers and options – but not as easy as it was for those who had switched other services

Nearly seven in ten residential consumers *who had switched their electricity company or plan* felt it was fairly or very easy to compare the different offers and options (68%), which was slightly higher than in 2015 (61%).

The ease of comparing energy offers was benchmarked against other common services. As was the case in 2015, fewer consumers found it easy to compare electricity offers than offers for most of the other services asked about, including home insurance, home or mobile phones, car or health insurance and banking products – as shown in the chart below.

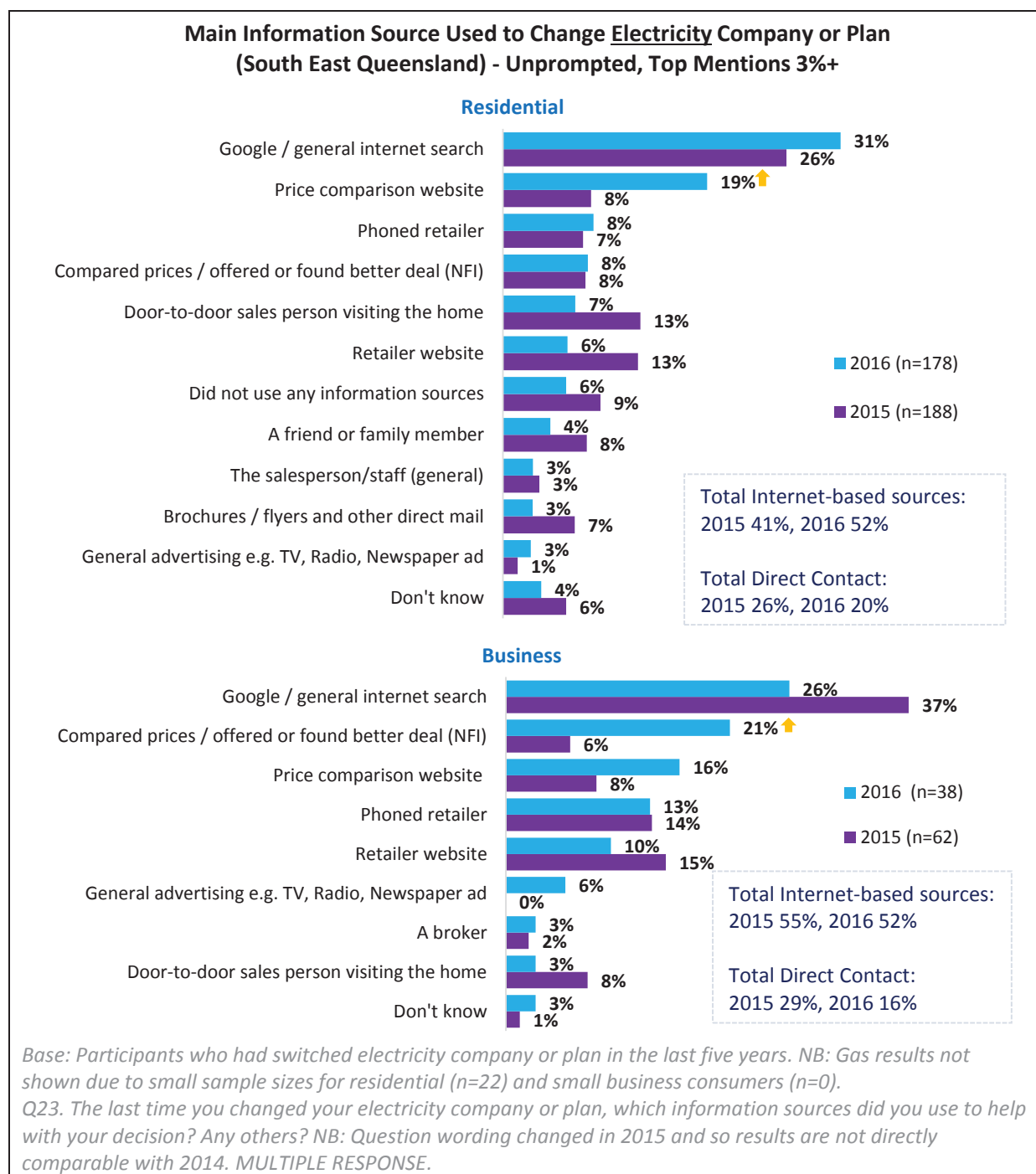
Among *small business consumers*, there was a very notable increase in the proportion who felt it was easy to compare electricity offers (up significantly from just 51% in 2015 to 82% in 2016).



More consumers used price comparison websites to help with their decision to switch

Among residential consumers in South East Queensland who had switched, Google or general internet-based searches remained the most common information source to help them change electricity company or plan (31%). However, a significantly higher proportion used a price comparison website (19% in 2016 vs. 8% in 2015). By contrast, slightly fewer directly used a retailer website to help with their decision (6%, down from 13% in 2015).

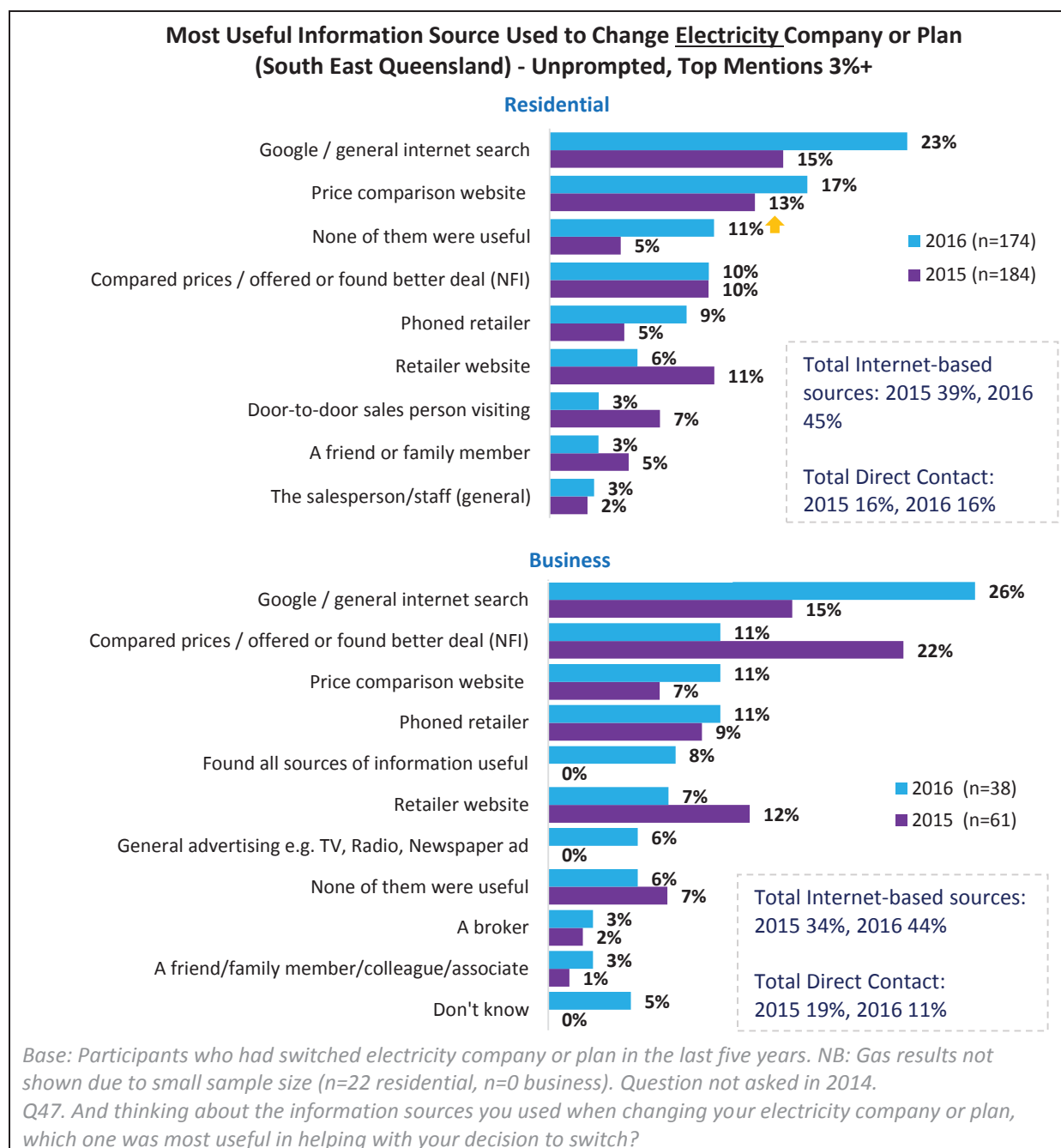
The top source among business consumers was also Google / internet searches (26%, down from 37% in 2015, but this was not statistically significant). There was an increase in those who compared prices or were offered a better deal (no further information provided, at 21%; up from 6% in 2015).



Among South East Queenslanders who switched electricity company or plan, internet-based sources were again considered the most useful

Consumers who had switched electricity company or plan were asked which information source they thought was *most useful*. Consistent with the most *used* sources and results in 2015, internet-based sources remained the most *useful* (nett 45% among residential switchers and 44% of small businesses). Specifically, Google or general internet searches were the most useful (23% among residents and 26% among small businesses), followed by price comparison websites (17% and 11%).

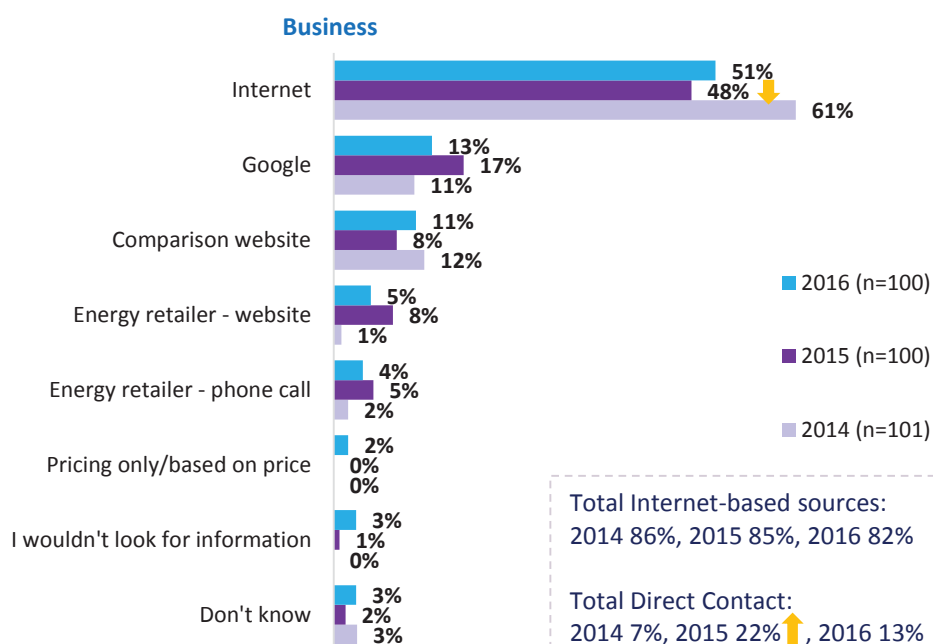
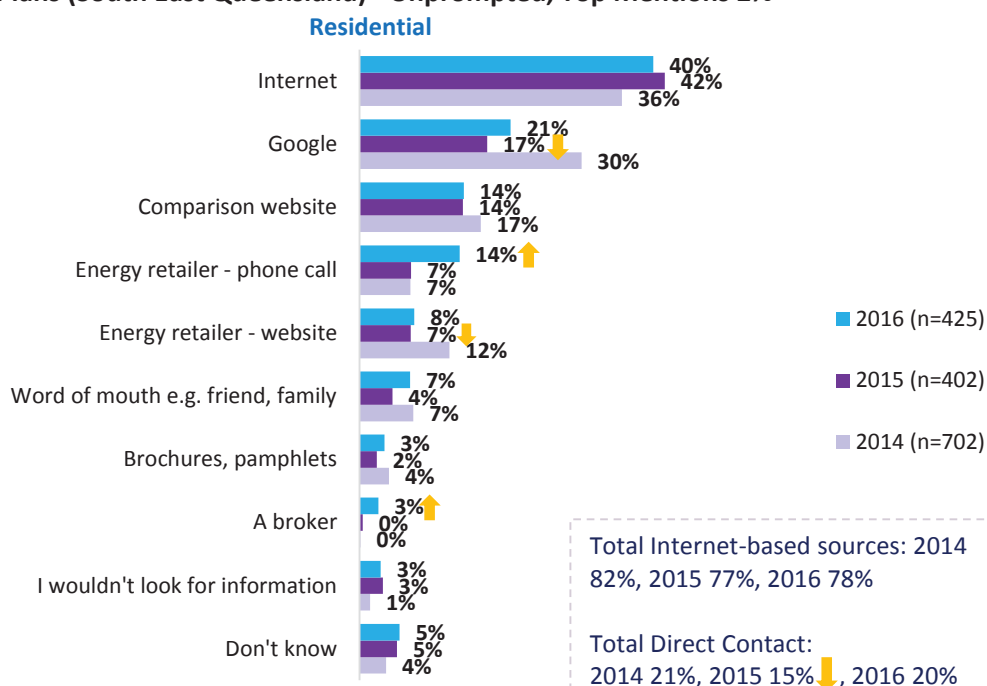
A significantly higher proportion of *residential* switchers felt that *none* of the information sources were useful (11%, up from 5% in 2015).



For general information about energy offers, internet sources remain the standout most preferred

All survey participants were asked what information source they would *most prefer to use in the future if they were to investigate their energy options*. The chart below shows that year-on-year the most preferred source has generically been 'the internet', for roughly eight in ten consumers (78% among residential consumers and 82% among business consumers in 2016). Among residents, there was an increase in preference for calling an energy retailer (at 14%, up from 7% in both previous years) or using a broker (3% up from 0% in both 2014 and 2015).

Preferred Information Source for Information about Different Retailers or Plans (South East Queensland) - Unprompted, Top Mentions 2%+



Base: All survey participants.

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?*

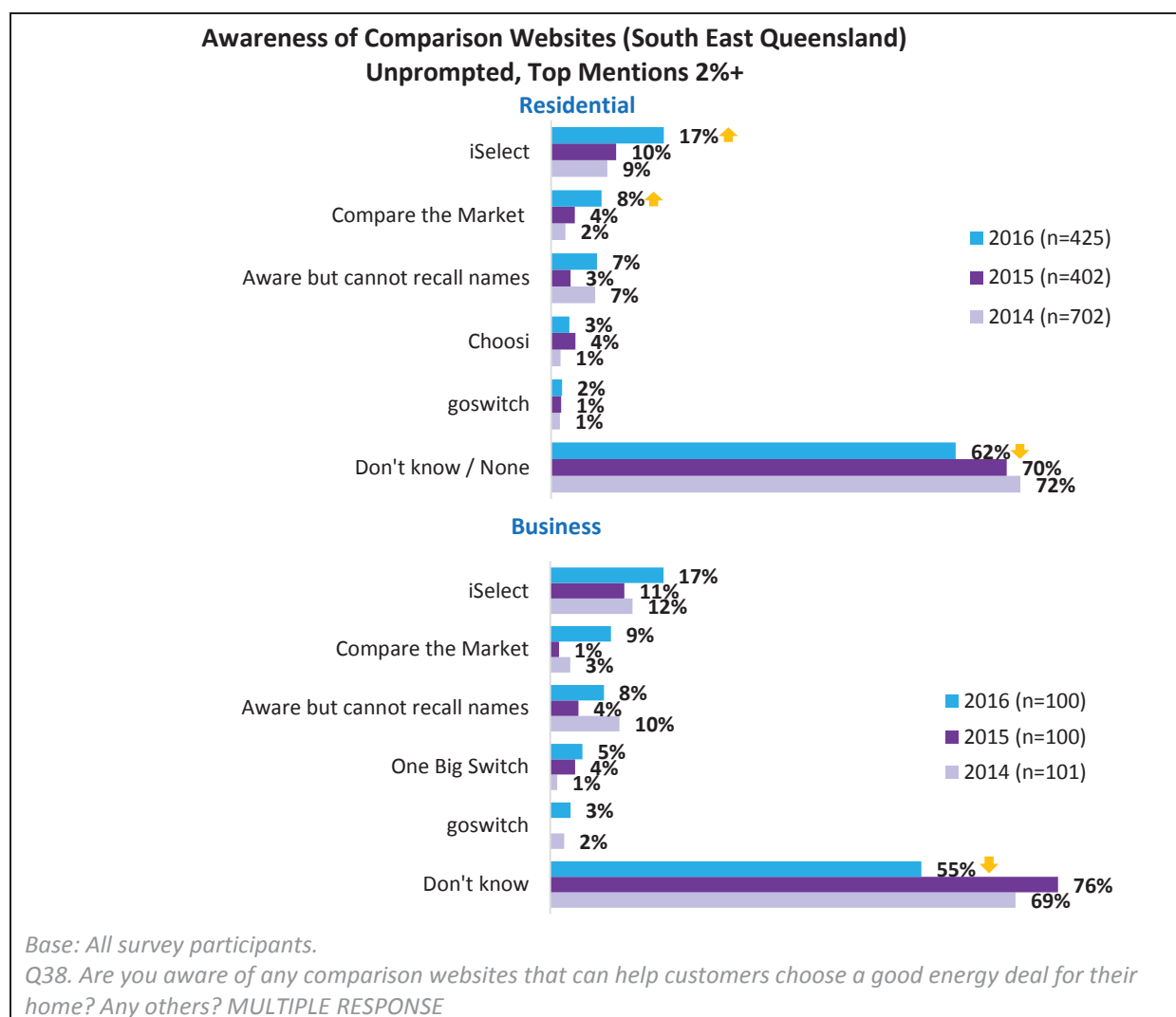
Despite a steady increase in awareness of comparison sites such as iSelect and Compare the Market, unprompted recall of independent Government websites was virtually non-existent

Unprompted awareness of comparison websites among all residential consumers remained low, with around six in ten unable to recall any comparator websites (62% in 2016, although this was significantly lower than both previous waves: 70% in 2015 and 72% in 2014). A further 7% were aware there were comparison sites but could not cite any specific names (versus 3% in 2015 and 7% in 2014). iSelect remained the most commonly mentioned site at 17%, which is significantly higher than in both previous years (10% in 2015 and 9% in 2014), followed by Compare the Market (also up significantly from 4% in 2015 and 2% in 2014, to 8% this year).

Unprompted recall of independent Government sites remained extremely low this year, with just 1% of South East Queensland residents aware of Energy Made Easy or the QCA Price Comparator.

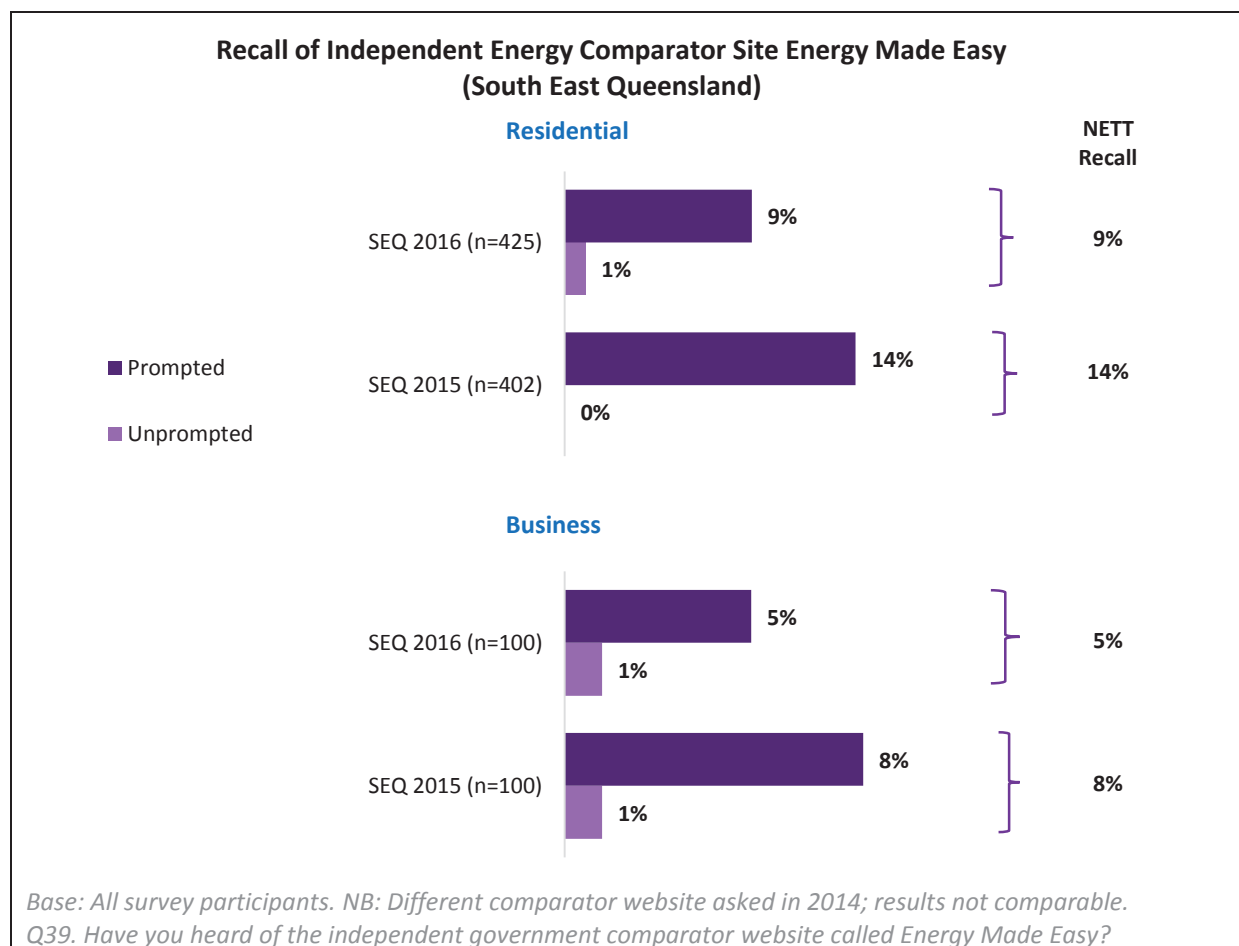
Among *business consumers* unprompted recall of comparison websites improved significantly on 2015, with a decrease in the proportion who were unaware of any sites (from 69% in 2014 and 76% in 2015 down to 55% in 2016). A further 8% were aware but unable to cite specific names in 2016 (cf. 4% in 2015 and 10% in 2014).

As with residents, for small business consumers iSelect (17%) and Compare the Market (9%) were the most commonly mentioned comparison sites. Unprompted recall of independent Government sites also remained virtually non-existent, with a total of just 1% of small business consumers naming Energy Made Easy or the QCA Price Comparator.



Prompted awareness of Energy Made Easy also remained fairly low

Total prompted and unprompted recall of the government comparator website called Energy Made Easy was low, at just one in ten residents (9%, similar to 12% in the 2014 benchmark and 14% in 2015) and 5% of small business consumers (vs. 8% in 2015 and significantly lower than 19% in the benchmark wave).



Five-year switching rates among residential consumers have continued to decline since 2014

The incidence of switching energy company and/or plan in the *last five years* declined significantly among residential consumers in 2015 and continued to decline slightly in 2016. In the latest survey, just four in ten residential consumers (43%) changed their electricity or gas company or plan in the past five years compared with 47% in 2015 and 57% in 2014. Despite the decline, the incidence of switching energy company or plan still remained higher than all other services.

However, switching rates in the *past 12 months* have remained stable among residential consumers, with around one in five reporting having switched in the last 12 months (18%).

Among *business consumers* there was a significant decline in switching rates for electricity in 2016. The incidence of having switched company or plan in the *last five years* fell to the lowest level of 38%, down from both the 50% benchmark and the peak of 62% in 2015. Further, the incidence of business consumers switching *within the last 12 months* almost halved from 29% in 2015 to just 15% in 2016.

These switching rates in SEQ are slightly lower than across the NEM, where on average 49% of residential consumers in 48% of business consumers had switched in the last five years. Overall, as per the trend across the NEM, the five-year switching rates in SEQ were higher for electricity and gas than other services and utilities such as insurances, telecommunications and banking (as tabled below).

Similar to results from previous waves, those who had actively investigated offers and options in the last 12 months were twice as likely to have switched in the *last five years* (70% vs. 34% of those who had not actively looked into this).

Switching Rates for Various Service Providers - *Last Five Years*

Incidence of Switching (% switched at least once in <i>last five years</i>)	SOUTH EAST QUEENSLAND Residential			SOUTH EAST QUEENSLAND Business		
	2014 (n=702)	2015 (n=402)	2016 (n=425)	2014 (n=101)	2015 (n=100)	2016 (n=100)
Electricity Company	44%	36% ↓	32%	43%	50%	31% ↓
Electricity Plan	31%	25%	22% ↓	34%	43%	25% ↓
TOTAL Electricity	57%	46% ↓	42%	50%	62%	38% ↓
Gas Company	27%	22%	21%	Not shown due to small sample sizes (n=10 in 2016)		
Gas Plan	21%	17%	23%			
TOTAL Gas	33%	24%	27%			
TOTAL Electricity or Gas	57%	47% ↓	43%	Business consumers not asked these questions.		
Car Insurance	39%	39%	38%			
Mobile Phone	34%	29%	30%			
Internet	32%	32%	23% ↓			
Home Insurance	27%	31%	27%			
Home Phone	26%	22%	16%			
Banking	19%	21%	20%			
Health Insurance	14%	15%	16% ↓			

Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample size: 2016 (n=10), 2015 (n=9), 2014 (n=7).

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?

Switching Rates for Electricity and Gas - *Last 12 Months*

Incidence of Switching (% switched at least once in <i>last 12 months</i>)	SOUTH EAST QUEENSLAND Residential		SOUTH EAST QUEENSLAND Business	
	2015 (n=402)	2016 (n=425)	2015 (n=100)	2016 (n=100)
Electricity Company	11%	10%	15%	8%
Electricity Plan	12%	11%	21%	10% ↓
TOTAL Electricity	18%	20%	29%	15% ↓
Gas Company	12%	12%	Not shown due to small sample sizes.	
Gas Plan	9%	10%		
TOTAL Gas	13%	14%		
TOTAL Electricity or Gas	19%	18%		

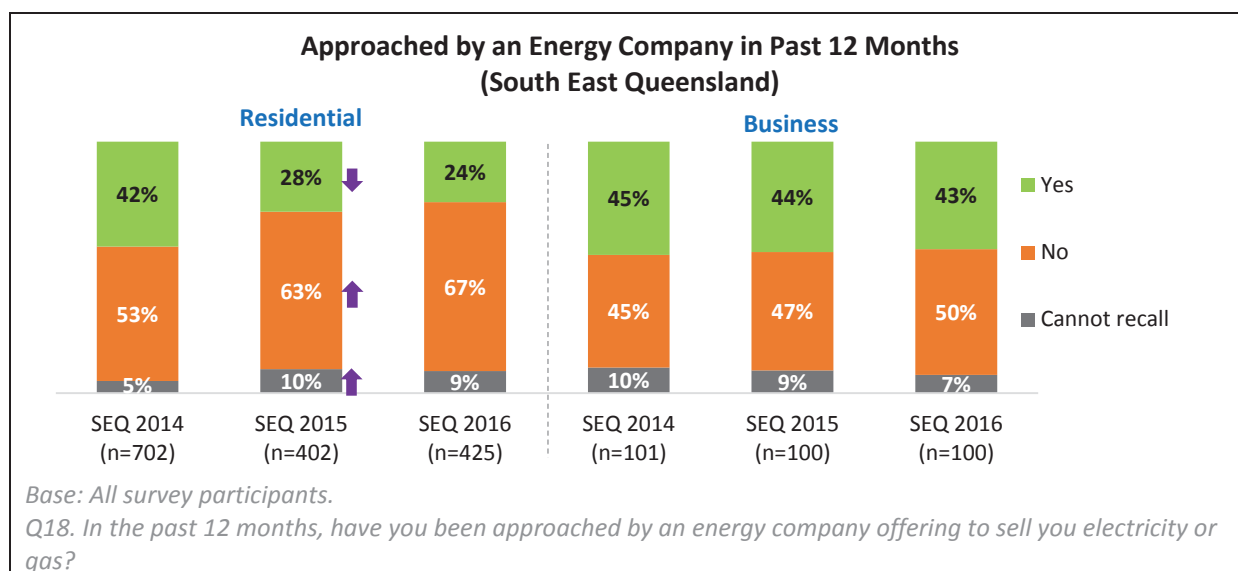
Base: All survey participants. Question not asked in 2014. NB: Small business consumer results for gas not shown due to small sample sizes: 2016 (n=10), 2015 (n=9).

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?

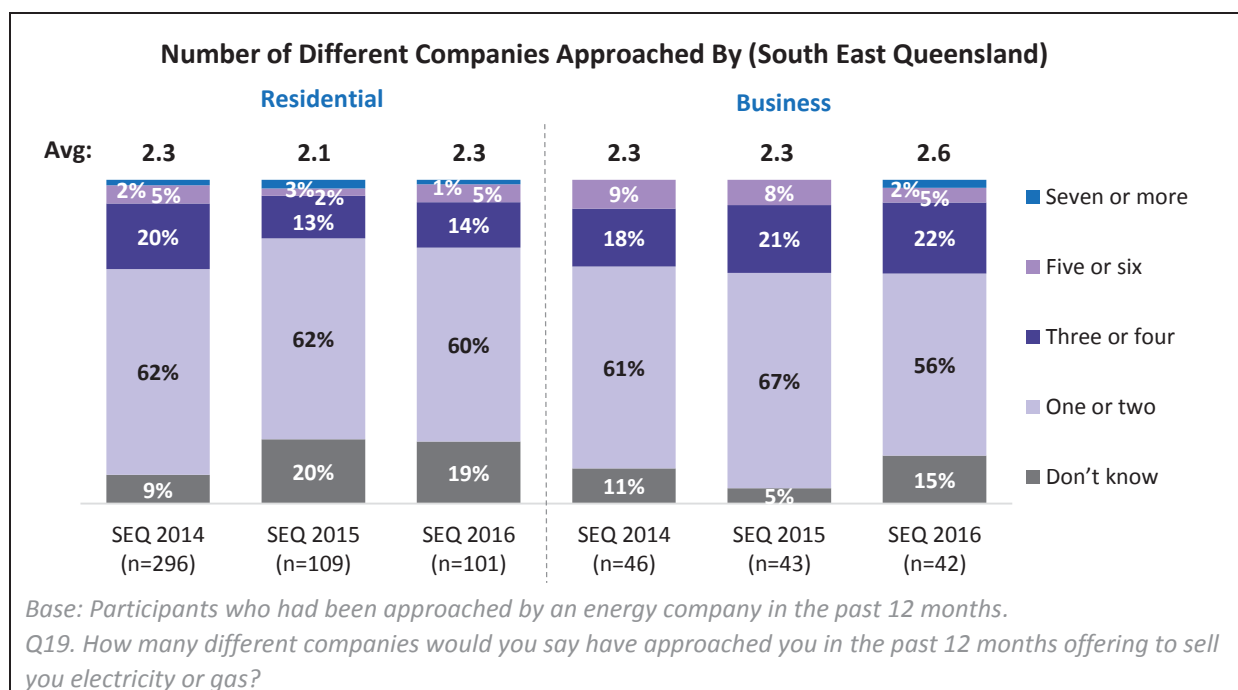
Direct approaches from energy companies relatively stable in South East Queensland

The stable level of switching rates among *residential* consumers in the last 12 months is in line with a relatively stable result for receiving direct approaches from any energy companies in the past 12 months. Around a quarter of the residential consumers surveyed reported being approached by an energy company in the past 12 months offering to sell them electricity or gas (24%), which is similar to the level in 2015 (28%), and remains significantly lower than in 2014 (42%).

Among small business consumers, despite falling switching rates, the incidence of direct approaches from energy companies has remained consistent over time (43% in 2016 compared with 44% in 2015 and 45% in 2014).

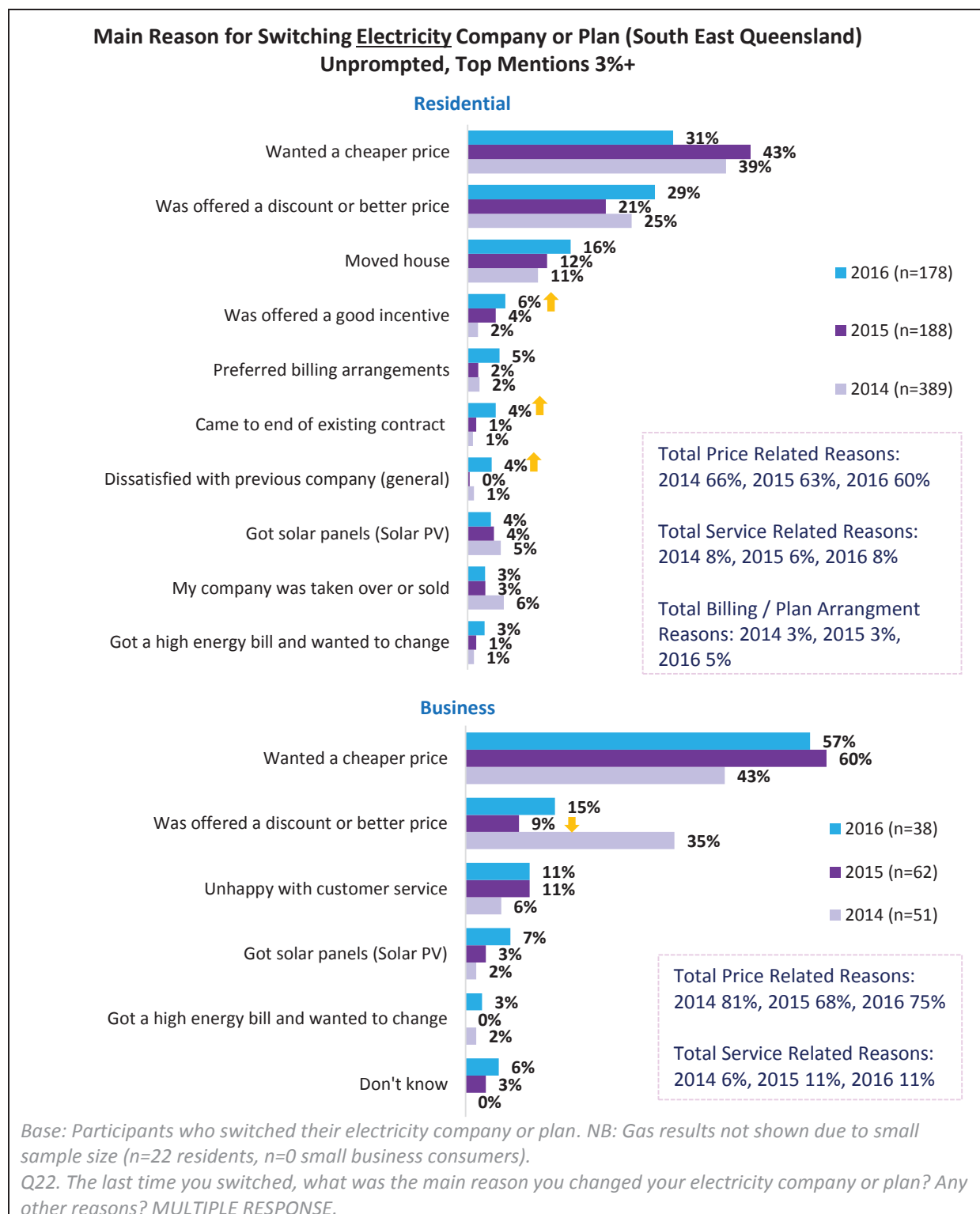


Among those approached, the majority were approached by just one or two companies (60% among residents and 56% among small business consumers). The average number of companies has stayed relatively consistent over the three years of the study, although increased slightly for small business consumers this year (from 2.3 in both 2014 and 2015 up to 2.6).



Competitive prices and discounts remained the biggest drivers for switching

Price related factors (wanting a cheaper price, being offered a discount, rebate or price incentive, or receiving a high energy bill) remained the biggest motivators for switching electricity company or plan in 2016. Three in five residential consumers (60%) and three in four small business consumers (75%) mentioned this unprompted. Consistent over time, around one in ten South East Queensland consumers switched because they were dissatisfied with their previous company or were unhappy with the service (nett 8% of residential and 11% of small business consumers).

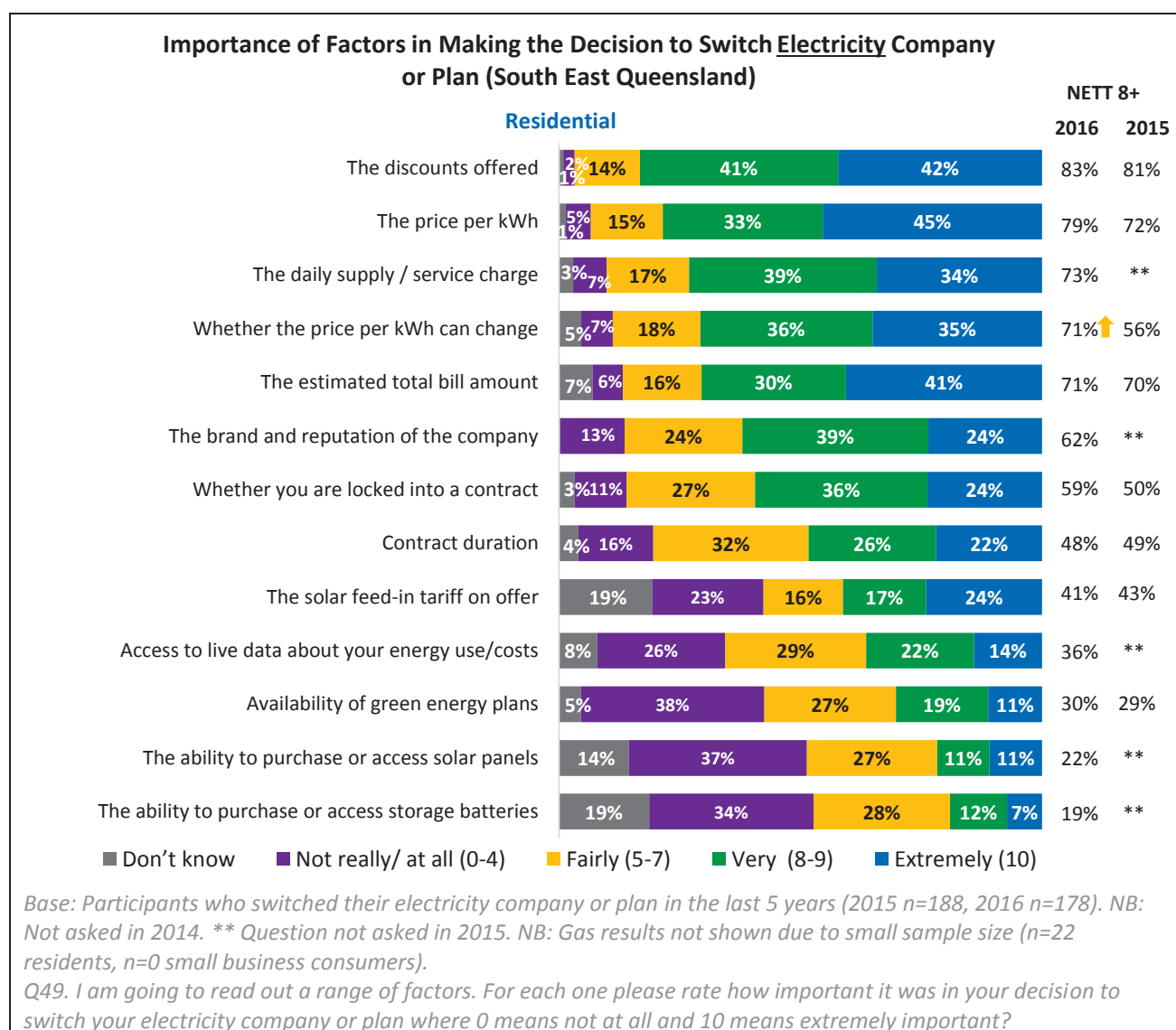


When prompted with a range of considerations when switching electricity company or plan, the discounts offered and the price per kWh were again considered the most important factors

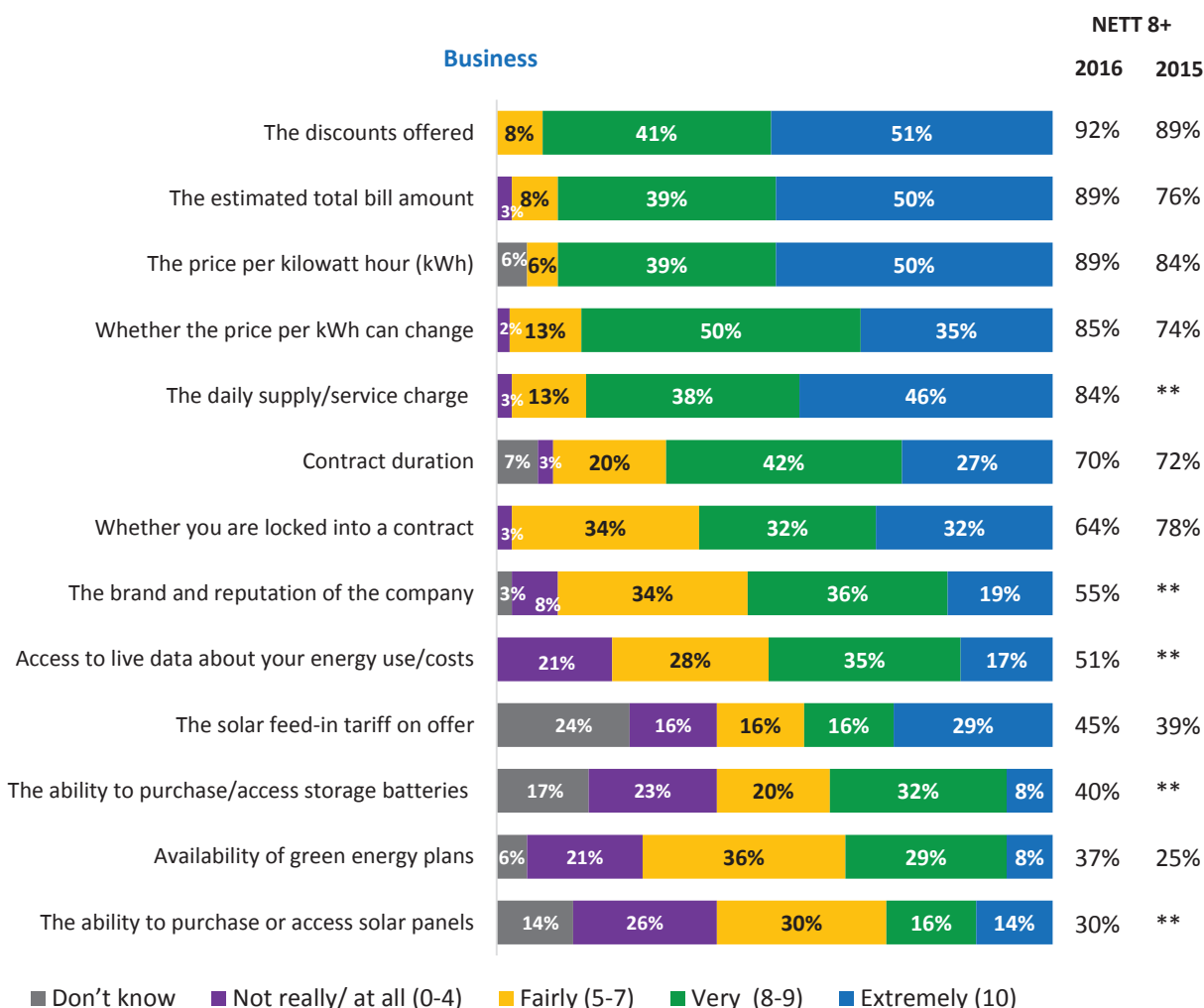
As was the case in 2015, when *those who had switched company or plan in the last five years* were prompted with a range of factors that could be considered when deciding whether or not to switch, the most important ones for them were again the discounts offered: 83% of residents and 92% of small business consumers rated the importance of this as 8 or more out of 10, and the price per kWh (79% and 89% respectively). Still price related, the next most important factors included the daily supply or service charge (73% and 84%), whether the price per kWh can change (71% and 85%), and the estimated total bill amount (71% and 89%). In 2016 there was an increased focus on whether the price per kWh could change (residential: from nett 8+ at 56% in 2015 to 71% in 2016, small businesses: up somewhat from 74% to 85%).

Of least importance to consumers were some of the new measures: the ability to access storage batteries from the retailer (nett 8+ ratings of 19% among residential consumers, and 40% among businesses), ability to access solar panels (22%, 30%) and the availability of green energy plans (30%, 37%). Notably though, these results suggest that small business consumers were more interested in emerging technologies than residential consumers.

In line with results from the 2015 study, consumers with solar panels were significantly more likely to consider the solar feed-in tariff a key priority (79% of these residents and 84% of these small business consumers gave this a rating of 8+) than those *without* solar panels (23% and 27%).



Importance of Factors in Making the Decision to Switch Electricity Company or Plan (South East Queensland)



Base: Participants who switched their electricity company or plan (2015 n=62, 2016 n=38). NB: Not asked in 2014. ** Question not asked in 2015.

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?

Consumers with higher energy bills again wanted a bigger saving before considering switching

In order to seriously consider switching their company or plan, on average residents indicated that they would need to save \$218 per year on their electricity bill and \$158 on their gas bill, as tabled over the page.

By comparison and reflecting their higher average energy bills, small business consumers felt they would need to save about \$386 on their electricity bill in order to consider switching. This was significantly lower than in 2015 (\$627).

For both residential and small business consumers, there was a common trend in that those with higher electricity bills needed a bigger saving before they would seriously consider changing. However, by bill size, those with low and medium electricity bills among both residential and business consumers were more likely to cite lower amounts this year, suggesting that smaller customers were more price sensitive this year.

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	SOUTH EAST QUEENSLAND Residential		SOUTH EAST QUEENSLAND Business	
	2015 (n=402)	2016 (n=425)	2015 (n=100)	2016 (n=100)
Total	\$230	\$218	\$627	\$386 ↓
Last Quarterly Electricity Bill: Low	\$190	\$184	\$311	\$236
Last Quarterly Electricity Bill: Medium	\$250	\$230	\$577	\$389
Last Quarterly Electricity Bill: High	\$257	\$273	\$1,146	\$1,143

Base: All survey participants.

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? Residential: "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above. Business: "Low" is <\$500, "Medium" is \$500 to <\$1,000, "High" is \$1,000 and above.

Amount Needed to Save Annually on <u>Gas</u> Bill to Seriously Consider Changing (Average by Bill Size)	SOUTH EAST QUEENSLAND Residential	
	2015 (n=69)	2016 (n=79)
Total	\$144	\$158
Last Quarterly Gas Bill: Low	\$136	\$138
Last Quarterly Gas Bill: Medium	\$157	\$231
Last Quarterly Gas Bill: High	\$136	\$165

Base: Participants with mains connected gas. NB: Business results not shown due to small sample size (n=10).

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?

Around half of the consumers in South East Queensland were either currently looking or at least interested in seeking out a better deal – especially younger males with relatively high bills

When asked about their current behaviours and intentions in relation to switching, almost half of the consumers surveyed were *currently looking or interested in looking for a better deal* (nett 47% of residents and 49% of small businesses), and two in five indicated they were *not interested in looking* (both at 40%).

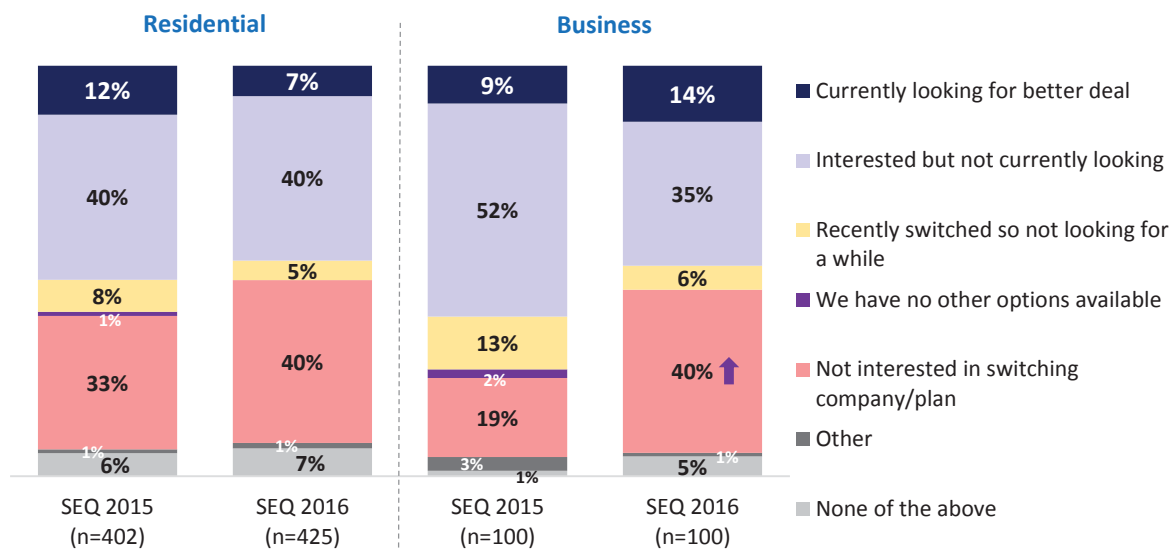
For residents, this was fairly consistent with 2015 (52%), but for small business consumers it represented a significant increase in the proportion who were *not interested in switching* in 2016 (up from 19% in 2015) and a notable decrease in the proportion who were *interested but not currently looking for a better deal* (from 52% in 2015 to 35% in 2016).

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:

- Males (54% vs. 42% of females);
- Under the age of 35 years (58% vs. 45% of those aged 35+);
- Live in a household with children under the age of 18 (58% vs. 43% without children);
- Had actively investigated offers and options in the past 12 months (62% vs. 42% of others);
- Had switched in the last five years (58% vs. 39% of those who had not); and/or
- Had a relatively high quarterly electricity bill of \$500+ (60% vs. 45% of those with a lower bill).

These differences are broadly in line with those seen in 2015 and consumers across the NEM.

Interest in Looking for a Better Deal (South East Queensland)



Base: All survey participants.

Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household? NB: Results for 2014 are not shown due to change in question structure.

2A.2.2 Consumer Outcomes

Introduction

This section of the report details the findings on South East Queensland consumers’:

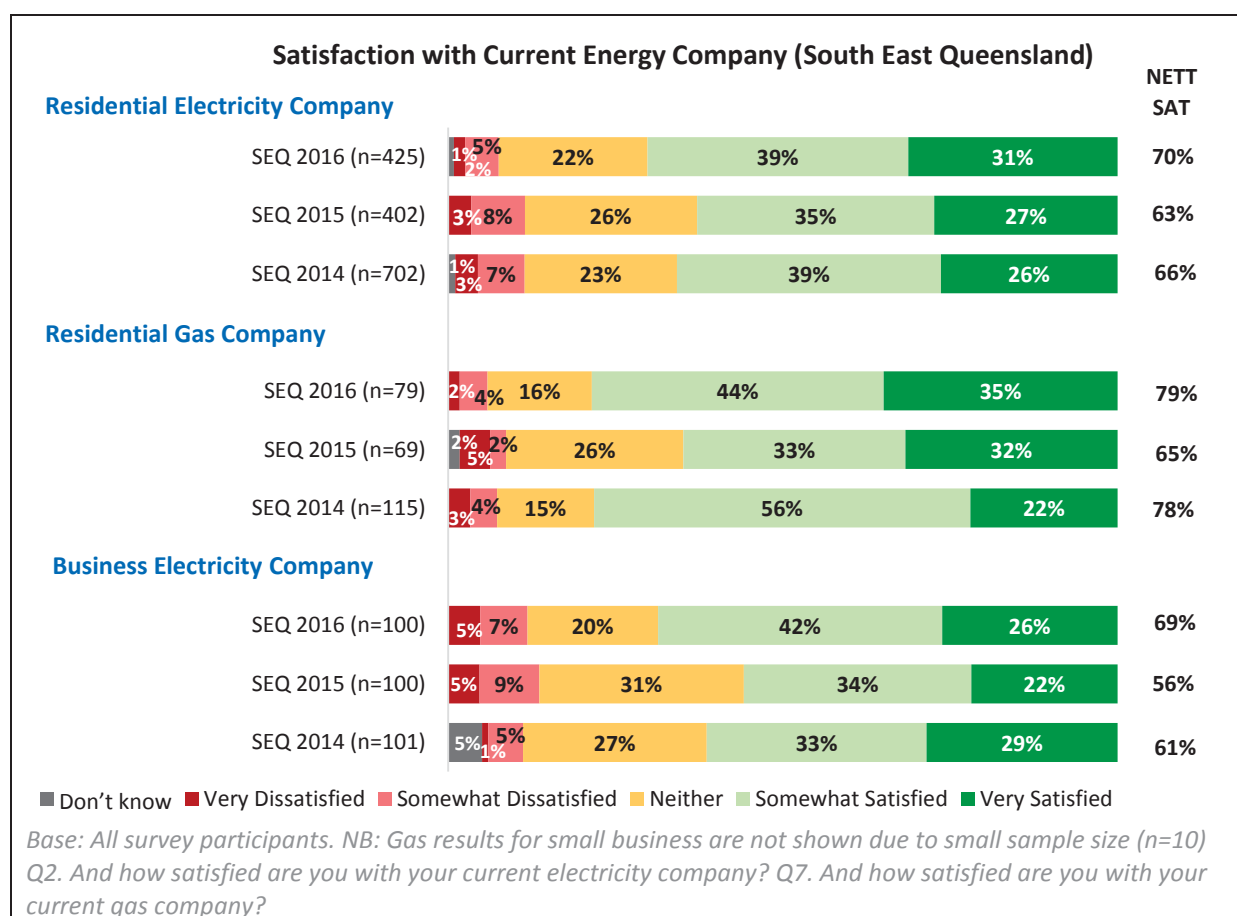
- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market;
- Satisfaction with the switching process among those who had done so;
- Consumer confidence that they can find the right information and make the right choice in the market; and
- Attitudes to switching.

The Results

Satisfaction levels with energy companies in South East Queensland appear to have recovered

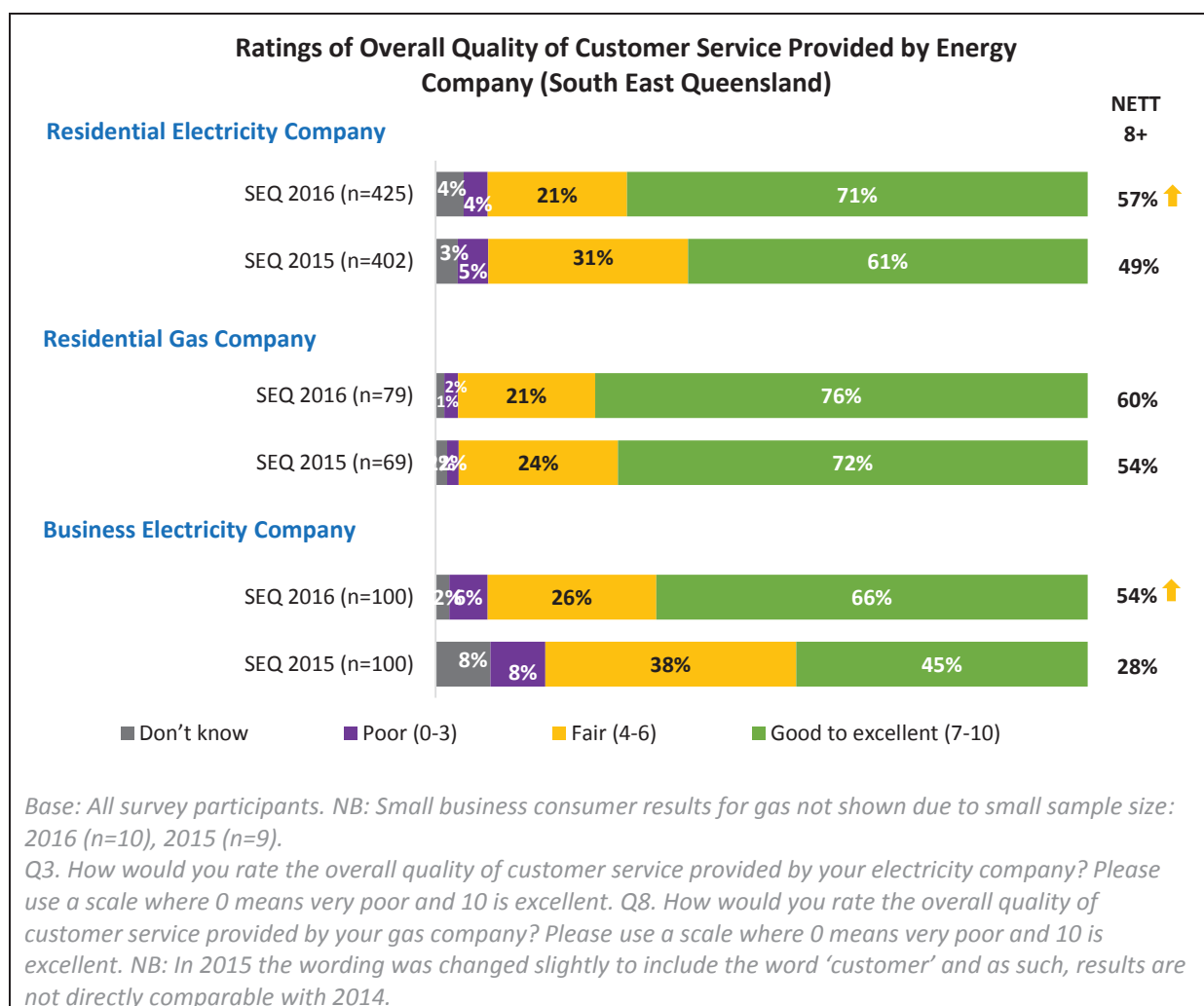
To provide context to the consumer activity results, all survey participants were asked whether they were satisfied with their current energy companies. Seven in ten residential consumers were somewhat or very satisfied with their electricity company (nett 70%). This has remained relatively consistent over time: 66% in 2014, 63% in 2015). Satisfaction levels were the same among business consumers (69% in 2016, up from 56% in 2015 and 61% in 2014).

Somewhat more consumers were satisfied with their gas company than their electricity company, at 79% among residential consumers, returning to the benchmark of 78% after a dip in 2015 (65%).



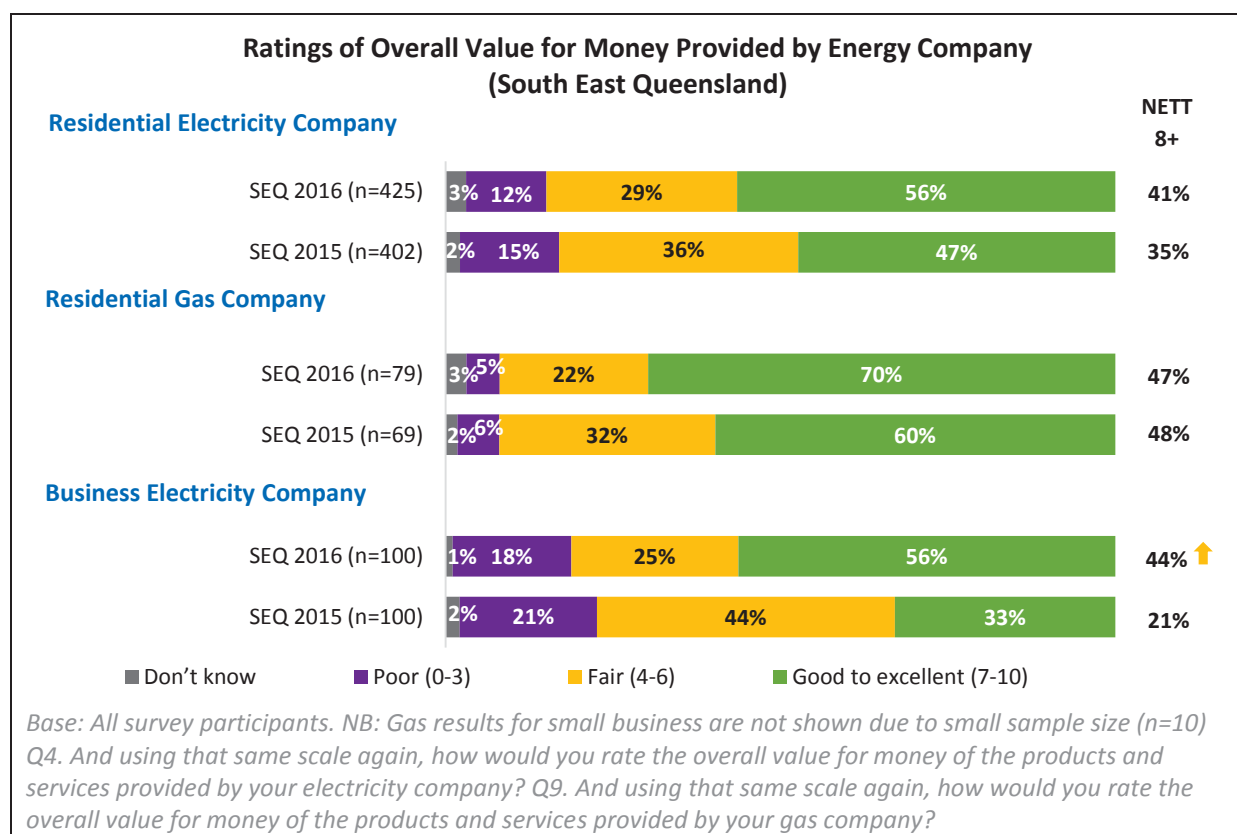
When it came to the overall quality of customer service provided by their electricity company, there was a significant improvement in ratings this year for both residential and small business consumers: 71% of residents gave a rating of 7 or more out of 10, up from 61% in 2015, and 66% of small businesses, up from 45%.

The overall quality of service provided by gas companies remained fairly consistent this year, with 76% of residential consumers giving a rating of seven or more out of 10 (compared to 72% in 2015).



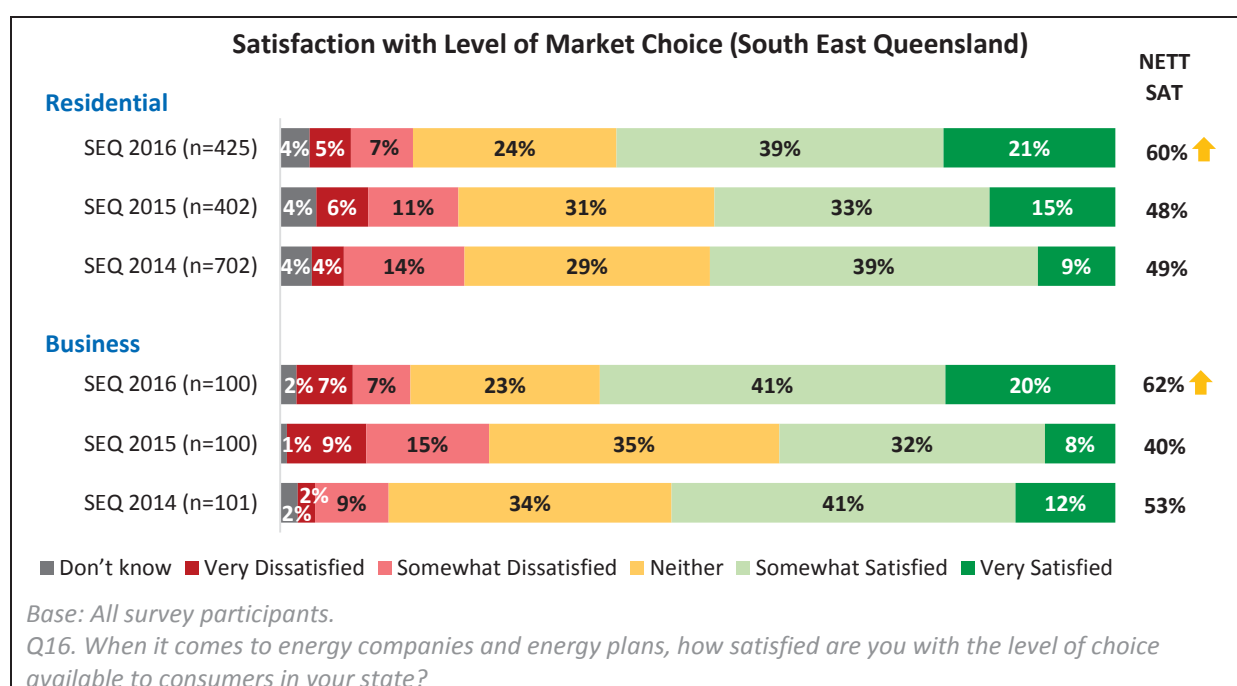
There was also some improvement in value for money ratings for *electricity* companies this year. The chart over the page shows that among residential consumers, 56% gave a rating of 7+ compared with just 47% in 2015, though this was not a statistically significant increase. Among small business consumers though, there was a significant improvement from 33% to 56% giving a 7 or more in 2016.

When it came to *gas* companies, overall value for money ratings were higher than for electricity – this is not surprising given that gas bills tend to be lower than electricity bills for many consumers. Seven in ten residential consumers (70%) gave their gas company a rating of 7+, up slightly from 60% in 2015.



Satisfaction with the level of choice in the South East Queensland energy market increased significantly this year and was at the highest since the study began

Participants were asked to indicate their satisfaction with the level of market choice in their state. The result improved significantly this year, with 60% of residential consumers and 62% of small business consumers somewhat or very satisfied (up from 48% and 40% in the previous year respectively, with both also higher than the 2014 benchmark). These results are fairly consistent with satisfaction levels in other NEM jurisdictions.

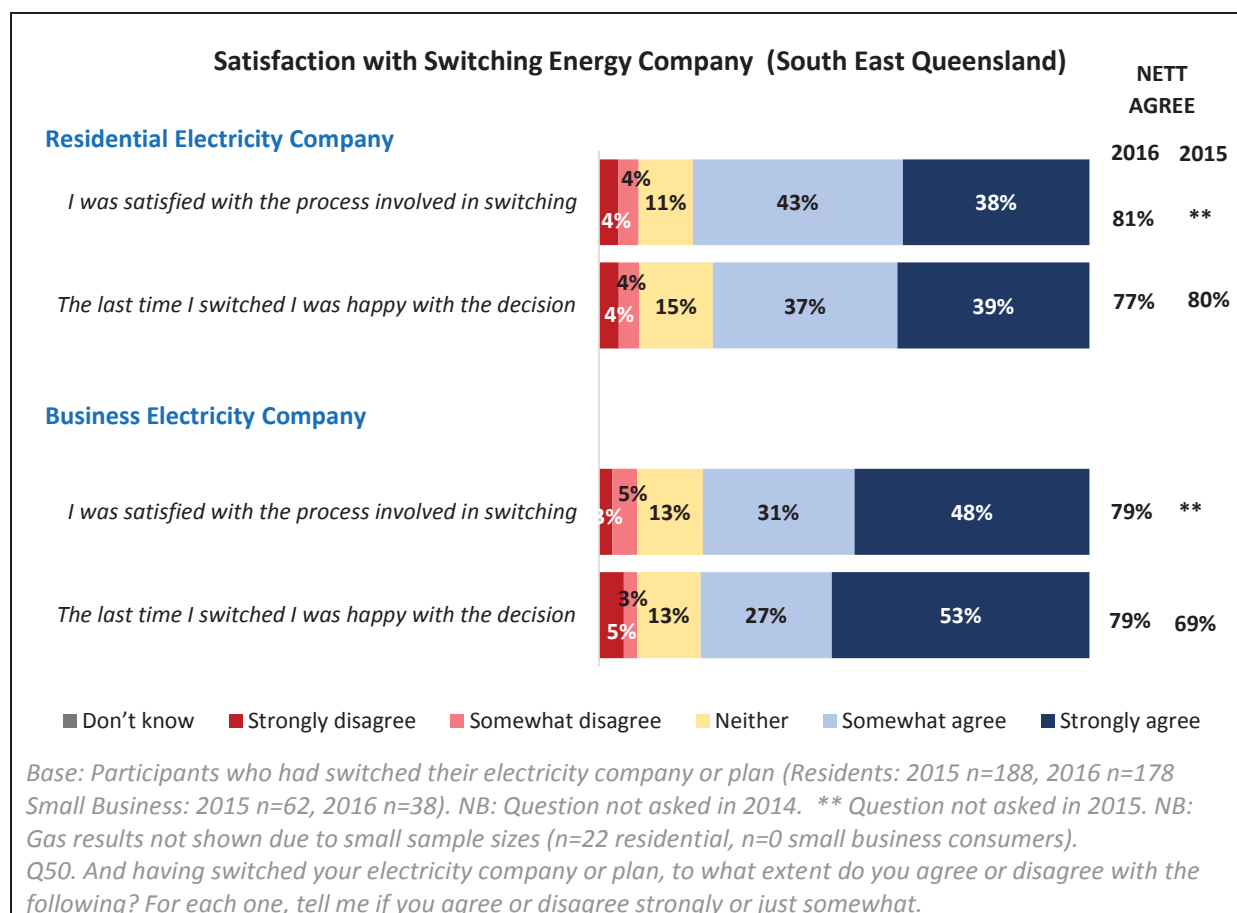


Most consumers who had switched their electricity company or plan were happy with their decision and satisfied with the process involved

The attitudes of consumers who had switched electricity company or plan in the last five years were explored through measuring agreement / disagreement levels with two statements.

Around eight in ten consumers agreed somewhat or strongly that they were *satisfied with the process involved in switching* (nett 81% of residents and 79% of small business consumers) – a new measure in 2016.

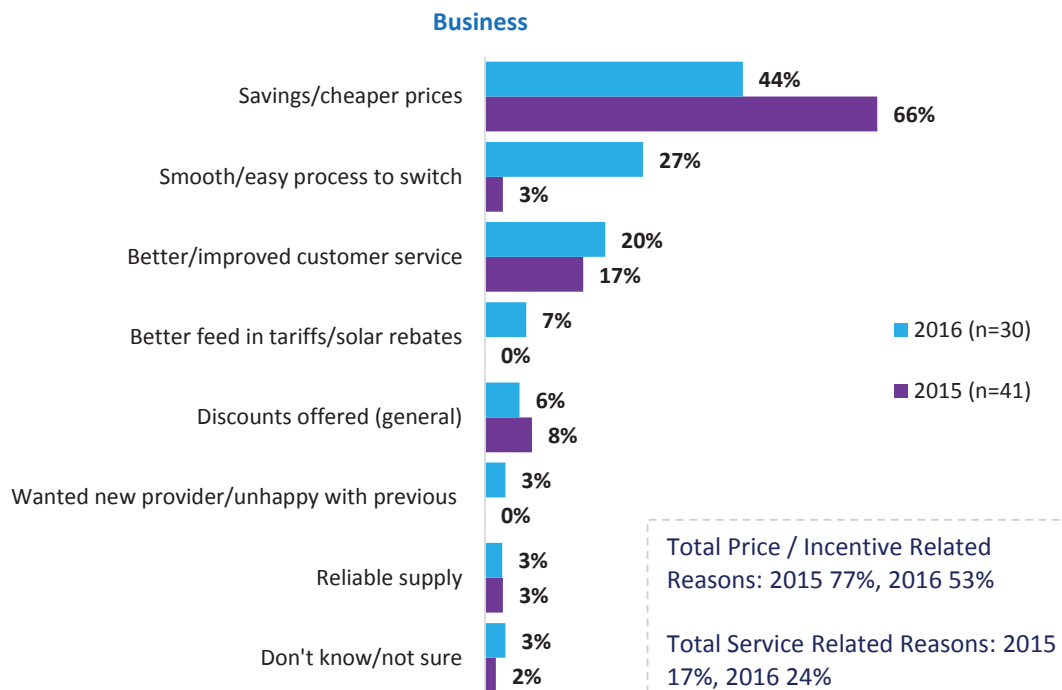
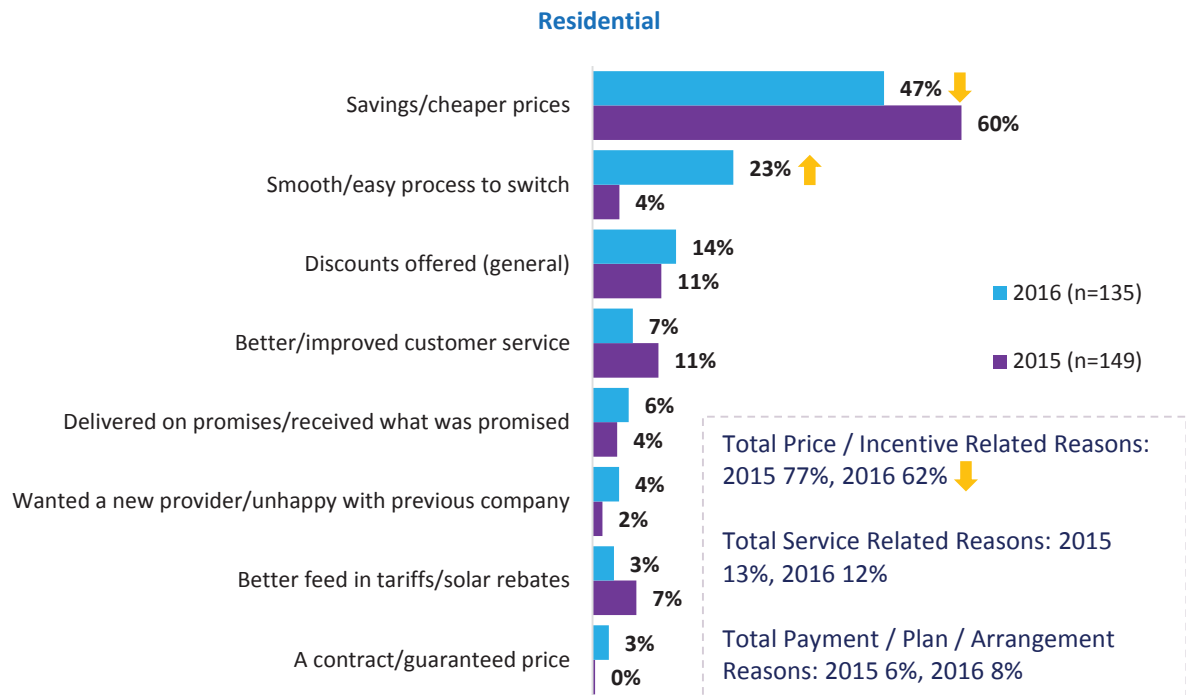
In line with results in 2015, a similar proportion agreed that *the last time I switched I was happy with the decision* (77% of residents and 79% of small businesses).



Those who agreed that they were *happy with the decision to switch* were asked the reasons why, with the results shown over the page. Although the savings or cheaper prices remained the top response, there was a decline in the incidence of this in 2016: down significantly from 60% in 2015 to 47% among residential customers, and among small business consumers from 66% to 44% - not statistically significant due to the small sample sizes).

By contrast, there was an *increase* in consumer satisfaction with their decision to switch because the process was smooth and easy (significantly among residential consumers: from 4% to 23% and notably but not statistically significant for business consumers: from 3% to 27%).

**Reasons for Being Happy with the Decision to Switch Electricity Company or Plan
Unprompted (South East Queensland), Top Mentions 2%+**



Base: Participants who agreed they were happy with their decision to switch electricity company or plan. NB: Gas results not shown due to small sample sizes (n=17 residential, n=0 business).

Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE.

Just n=15 residential consumers and n=3 business consumers were *not* happy with their decision to switch. Analysis of their responses shows that the main reason was due to the absence of any real savings, being switched without consent, and errors made in the switching process. A small selection of the verbatim responses from residential consumers is provided below:

"I wasn't aware of the service to location fee and that made the fee much, much dearer. They didn't tell me about it. They spruiked the price per kilowatt hour." Residential Consumer

"Ended up dearer and the deal wasn't quite as it was presented to me." Residential Consumer

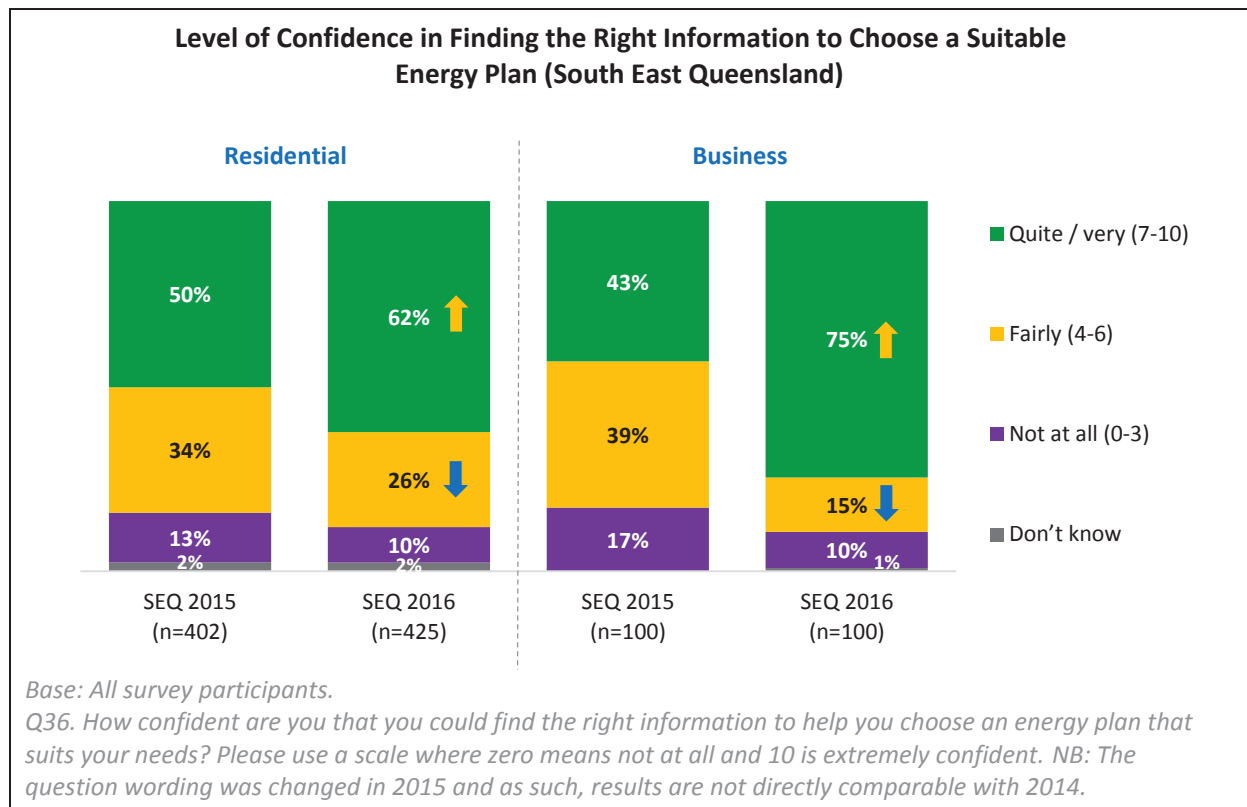
"It turns out that the seller gave wrong information and by the time I found out that he was wrong it was too late to cancel the contract." Residential Consumer

"It was not my decision, the company changed its plan." Residential Consumer

In comparison with 2015, consumers in South East Queensland were significantly more confident they could find the right information to choose a suitable energy plan

Consumers were asked to rate their confidence on a couple of measures, on a scale where 0 meant not at all and 10 meant extremely confident.

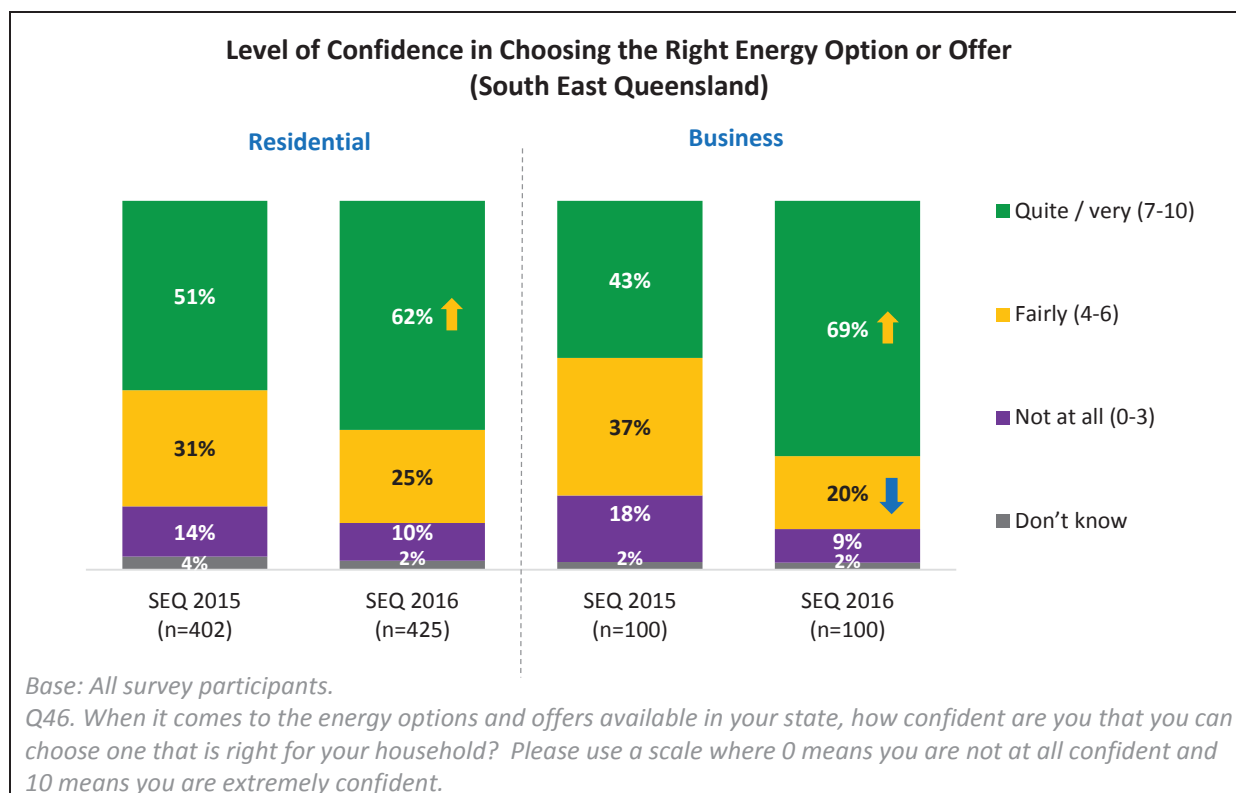
In terms of confidence that they could find the right information to choose a suitable energy plan, in 2016 three in five residents (62%) and three in four small business consumers (75%) gave themselves a rating of 7 or more. This was a significant increase from 2015 where just 50% of residential and 43% of small business consumers rated themselves this highly.



Confidence in actually being able to choose the right option or offer also increased significantly

Six in ten residential consumers were also highly confident they could choose the right energy option or offer for their household; 62% rated themselves 7+, which was significantly higher than in 2015 (51%).

Similarly, among small business consumers, a significantly larger proportion were highly confident this year (at 69%, up from 43% in 2015).



The majority of consumers agreed they would switch if they were not happy with their current company yet were concerned about hidden fees and charges if they did switch

To further understand market outcomes and consumer sentiment, participants were asked the extent to which they agreed or disagreed with several statements about switching. The strongest nett agreement levels were in line with 2015 findings for the statements: *I would switch my energy company if I was not satisfied with my current company* (78% residential, 82% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (65% residential, 62% small business). The latter result for businesses declined significantly from 73% in 2015.

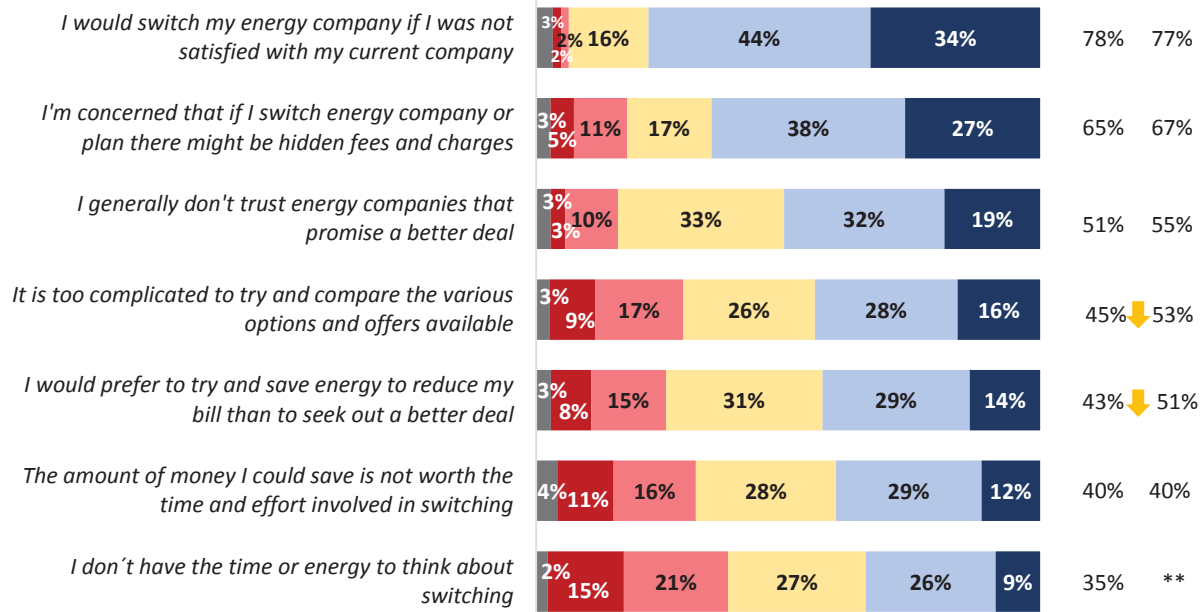
Notably, in 2016 significantly fewer residential consumers agreed that: *It is too complicated to try and compare the various options and offer available* (45%, down from 53% in 2015) – suggesting that efforts to make it easier for consumers to compare may be paying off in South East Queensland. They were also less likely to agree that *I would prefer to try and save energy to reduce my bill than to seek out a better deal* (43%, down from 51%), suggesting that the idea of finding a better deal appeals more than doing things to try and save energy. This sentiment would seem to be supported by the low proportion of participants who agreed with a new statement in 2016 that *I don't have the time or energy to think about switching* (residential: 35%, small businesses: 36%).

Attitudes to Switching (South East Queensland)

Residential

NETT Agree

2016 2015



■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly Agree

Base: All survey participants (2015 n=402, 2016 n=425). NB: ** Question not asked in 2015.

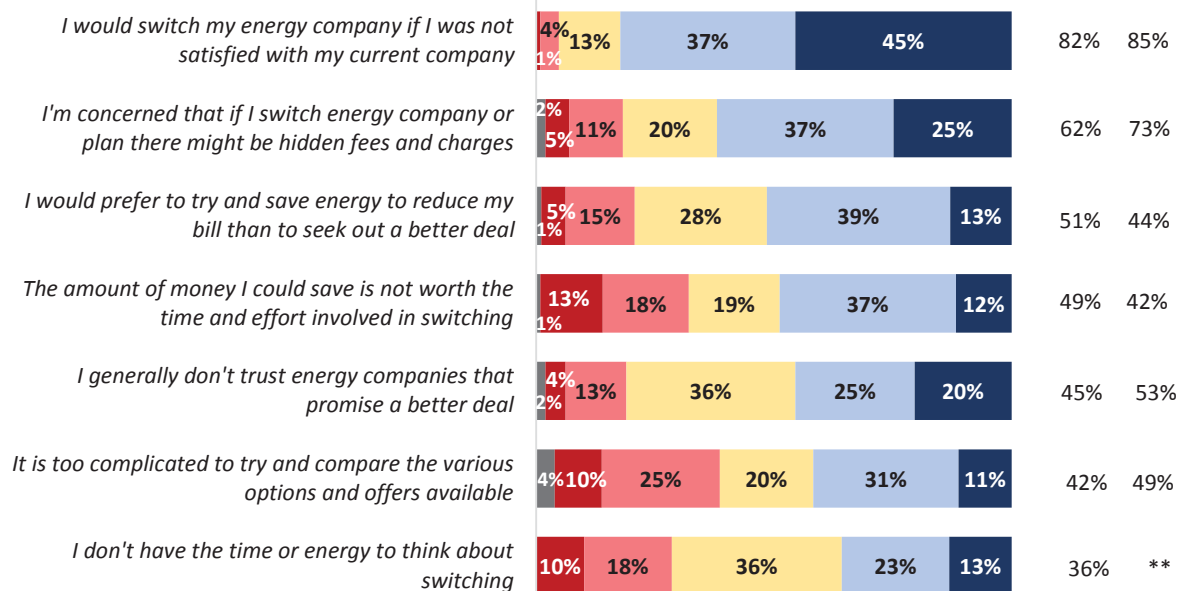
Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly...

Attitudes to Switching (South East Queensland)

Business

NETT Agree

2016 2015



■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly Agree

Base: All survey participants (2015 n=100, 2016 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...

2B: Rest of Queensland

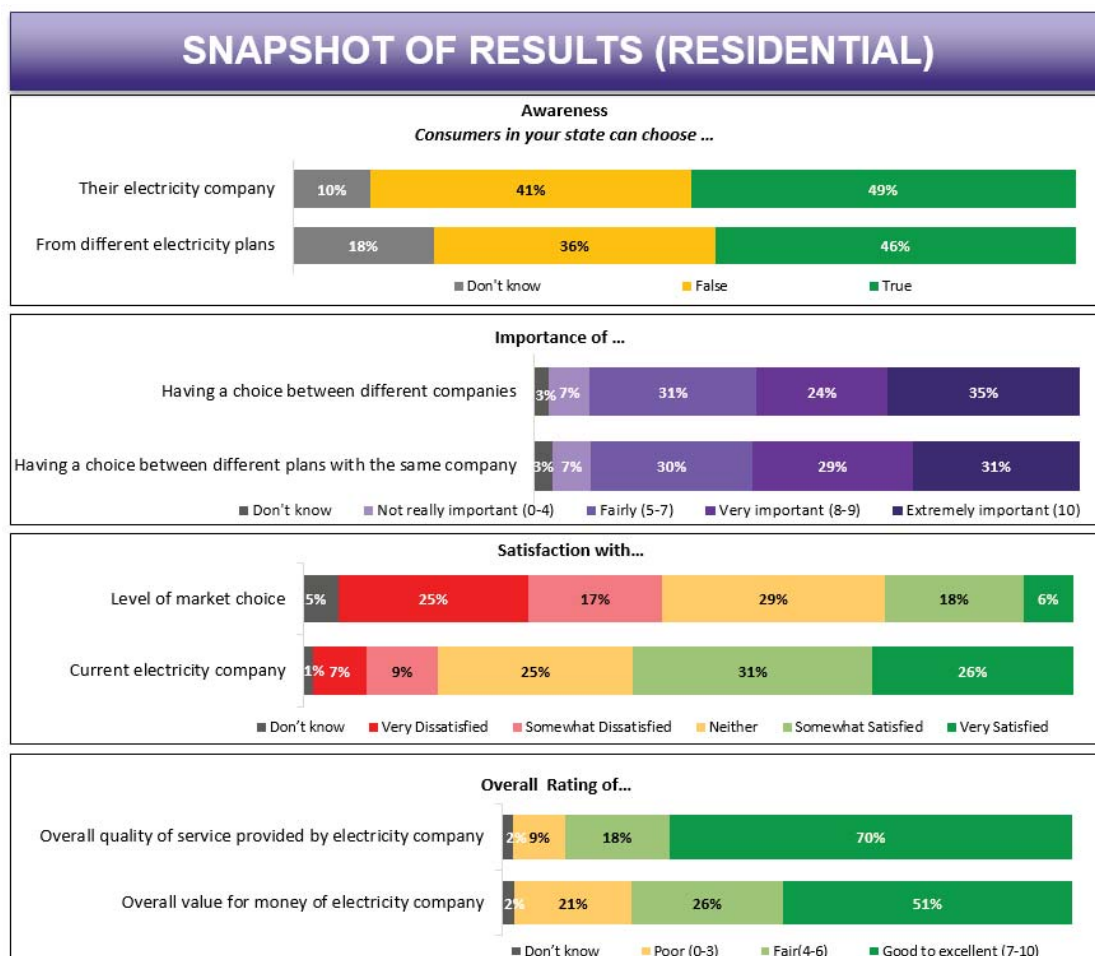
2B.1 Snapshot of Results

A high proportion of consumers in regional Queensland (i.e. outside of the South East, also referred to herein as ‘the rest of Queensland’) were dissatisfied with the level of choice in the energy market in their State (residential: nett 42% somewhat / very dissatisfied, business: 64%). Choice between a number of different electricity companies and plans was highly important to the majority, with 59% of residential consumers rating this an 8 or more out of 10 in importance, and 72% of business consumers. Having a choice between different plans and offers with the same company was seen as similarly important: e.g. 31% of residential consumers and 34% of businesses surveyed rated the importance of this as 10 out of 10.

Reflecting the limited choices in regional Queensland, consumer confidence in finding the right information to choose a suitable energy plan remained lower than in other parts of the NEM. Residents were more confident than businesses: 53% gave themselves a high confidence rating of 7 or more out of 10 vs. just 18% of business consumers. They were also more confident that they could choose the right option for their situation (33% vs. 8% of businesses rated themselves 7+).

Few regional Queenslanders knew of any comparison websites: 83% of residential and 94% of business consumers could not recall any without prompting. A further 4% of residential consumers and 2% of businesses had heard of them but were unable to cite any names. When prompted, recall of the price comparator website Energy Made Easy was low (residential: nett 3%, businesses: 16%).

Of note is that fewer consumers in the rest of Queensland were satisfied with their electricity company than in all other parts of the NEM.



2B.2 Key Findings

2B.2.1 Consumer Activity

Introduction

This is the first time the rest of Queensland has been included in the AEMC’s Competition Review. It encompasses the regional areas across the State, outside of South East Queensland. The level of choice in the rest of Queensland is limited to two companies (Ergon Energy and Sanctuary Energy) for both residential and business electricity consumers. The main difference between the two is that Sanctuary Energy’s daily supply charge is higher than Ergon Energy’s by around ten cents per day. Sanctuary also has termination and reconnection fee charges. Ergon Energy offers a choice of different electricity offers and options whereas Sanctuary Energy has a standing offer only.

Results among gas consumers are not shown due to the low incidence of gas mains connections in regional Queensland, and therefore very small sample sizes (residential: n=9, business: n=0).

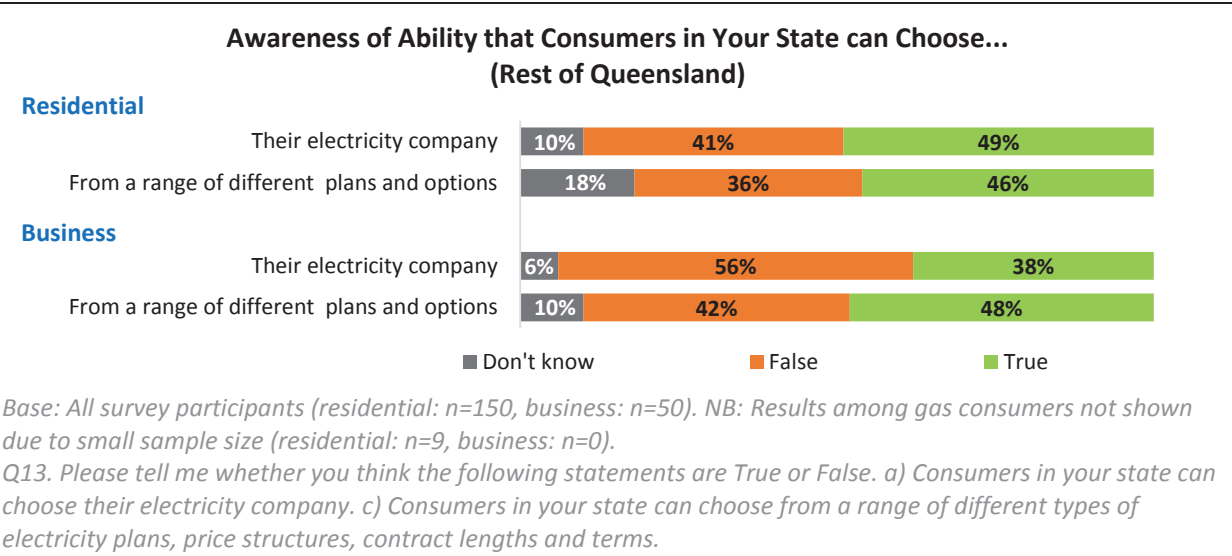
This section of the report details findings about the rest of Queensland’s consumers’:

- Knowledge of electricity market choices;
- Perceived importance of having a choice between different electricity companies, and between different options and offers with the same company;
- Preferred information sources for investigating different offers and options;
- Awareness of comparison websites;
- Confidence that they could find the right information and make the right choice; and
- Interest in seeking a better deal, and the savings needed to seriously consider switching.

The Results

Around half of consumers in the rest of Queensland knew that consumers in their State could choose from a range of electricity providers and from different plans and options

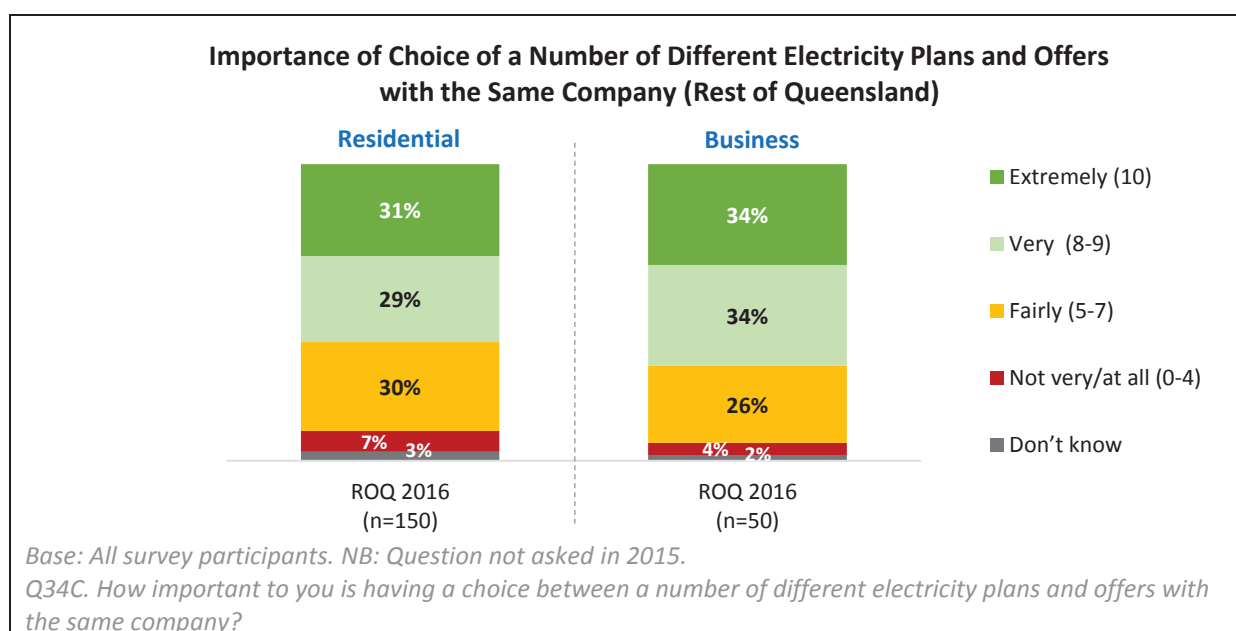
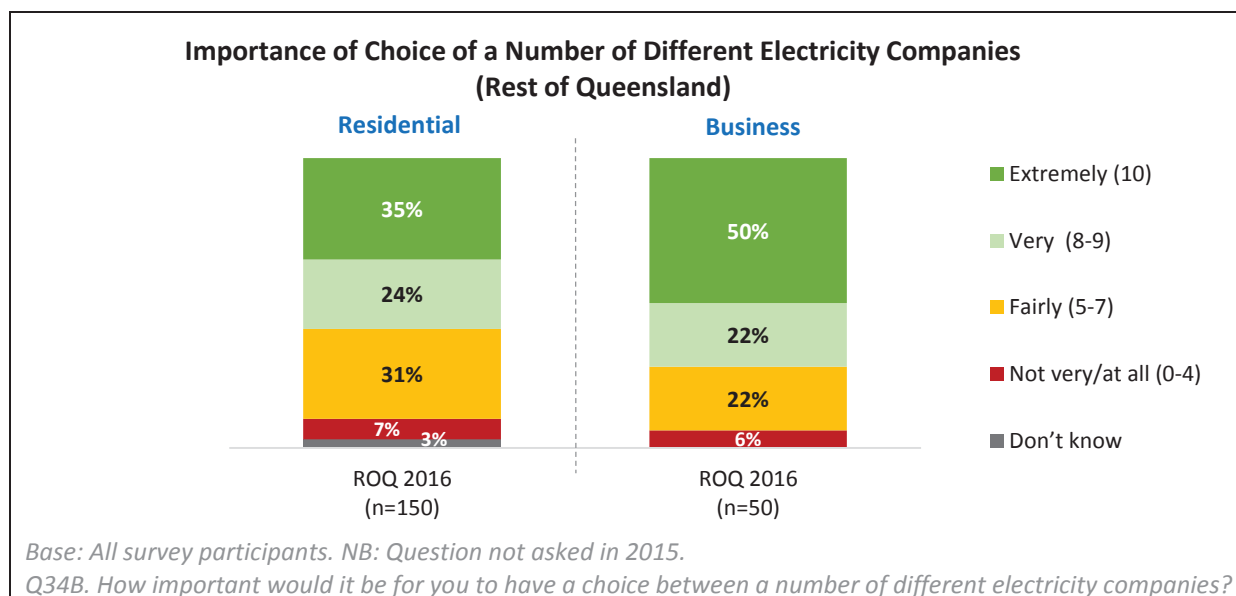
Survey participants were asked a series of true/false questions to measure their level of knowledge about the choices in the energy market in Queensland. As charted below, even if they did not necessarily have a choice themselves, around half of residents (49%) and four in ten businesses (38%) were aware that consumers in Queensland were able to choose their electricity company. A similar proportion (46%) of residents knew consumers in their State could choose from a range of different plans and options, as did around half of the business consumers surveyed (48%).



The majority of regional QLD consumers see choice in the energy market as highly important

To understand preferences, survey participants were asked how important it would be to have a choice between a number of different electricity companies, where 0 meant *not at all* and 10 meant *extremely important*. The majority thought this was highly important: around six in ten residential (59%) and two thirds of business consumers (72%) rated this as 8 or higher. Notably, a relatively large proportion rated this as a 10 out of 10: over a third of residential consumers (35%) and half of all business consumers surveyed (50%).

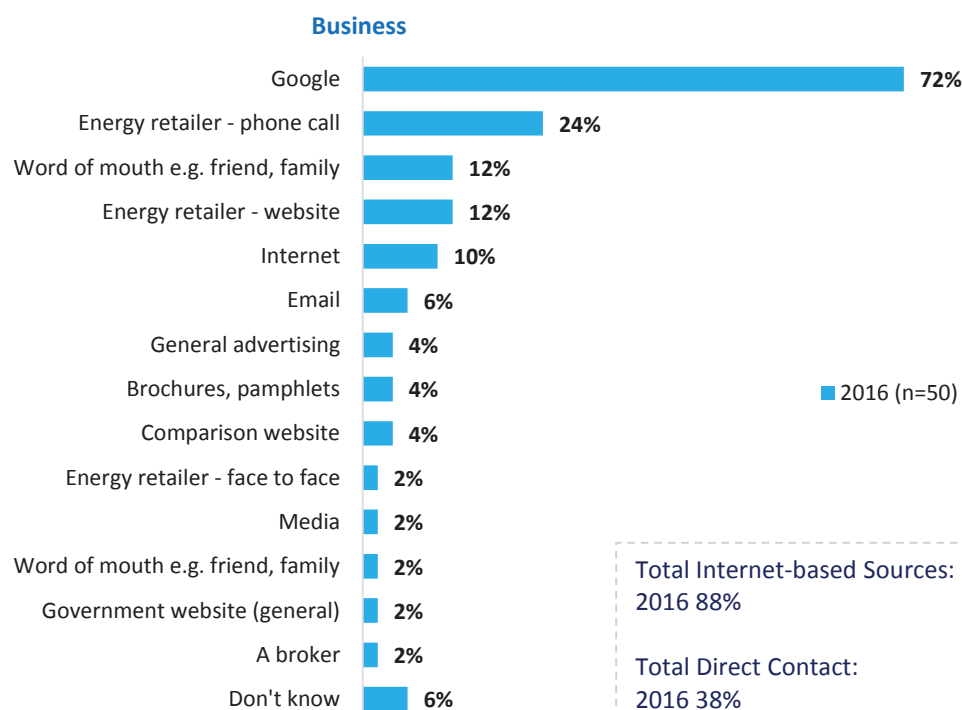
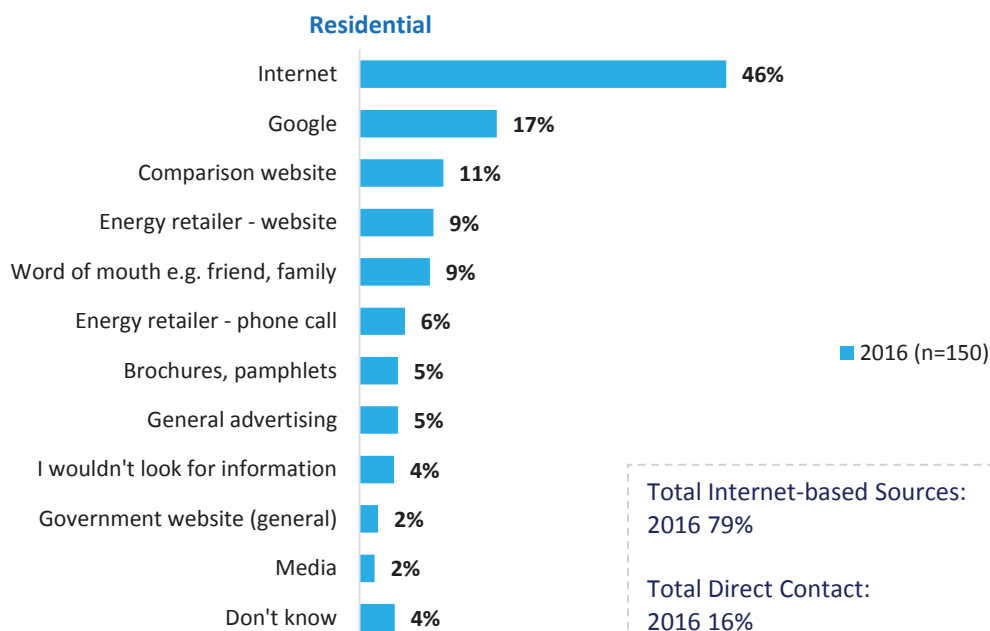
Similar, but slightly lower levels of importance were placed on having a choice between a number of different electricity plans and offers with the same company. A third of consumers rated this as extremely important (10 out of 10); 31% of residential consumers, and 34% of business consumers.



For general information about energy offers, internet-based sources were the most preferred

All survey participants were asked what information source they would *most prefer to use in the future if they were to investigate their energy options*. More than four in ten residential consumers (46%) and seven in ten business consumers (72%) nominated 'the internet' as the most useful, followed by 'Google' among residents (17%) and calling retailers directly among businesses (24%).

Preferred Information Source for Information about Different Retailers or Plans (Rest of Queensland) - Unprompted, Top Mentions 2%+



Base: All survey participants.

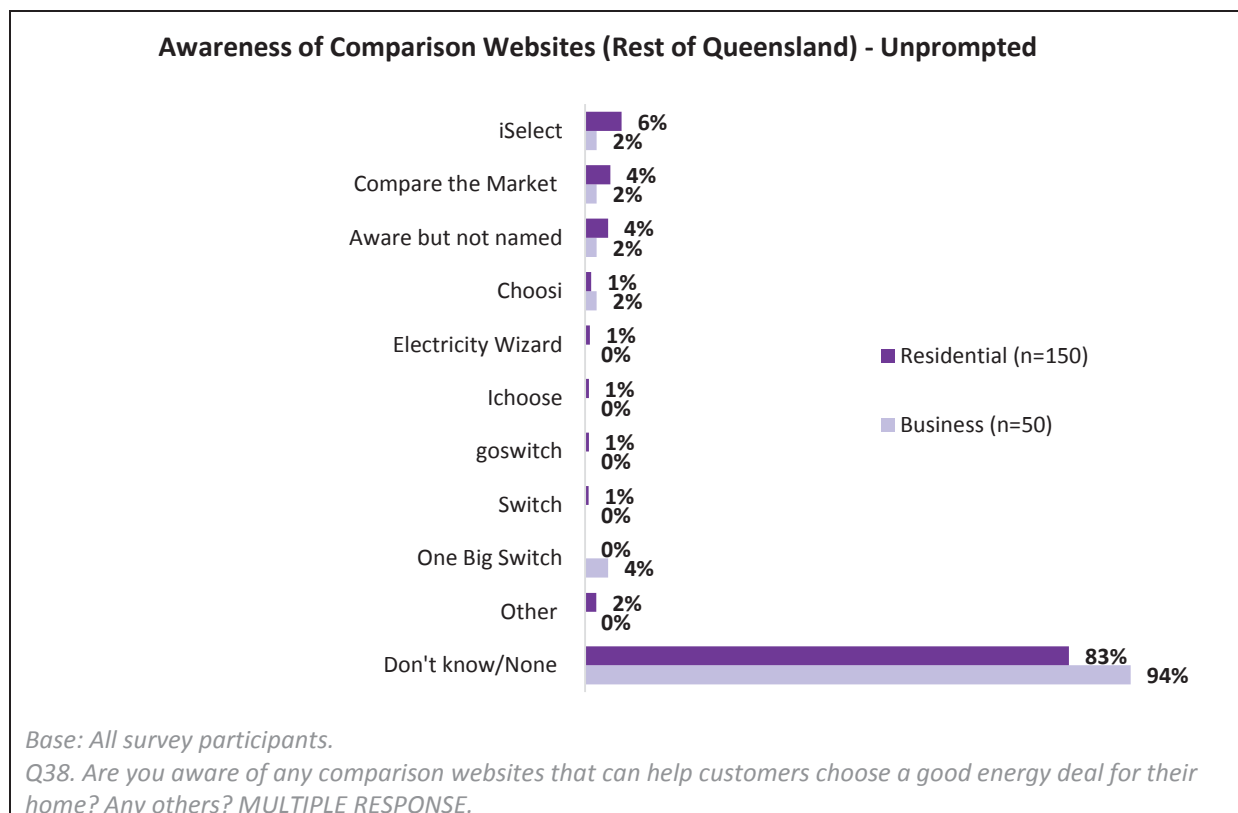
Q37. If you wanted to look for information about different energy retailers or plans, what would be your **MOST** preferred method or source of information?

Unprompted awareness of comparison websites was extremely low in the rest of Queensland

Most consumers were unable to recall the names of any comparator websites without prompting: i.e. 83% of residential consumers and 94% of business consumers. A further 4% of residential and 2% of business consumers indicated they had heard of such sites but could not cite the names of any. The most commonly mentioned comparator sites among residential consumers were iSelect (6% unprompted) and Compare the Market (4%).

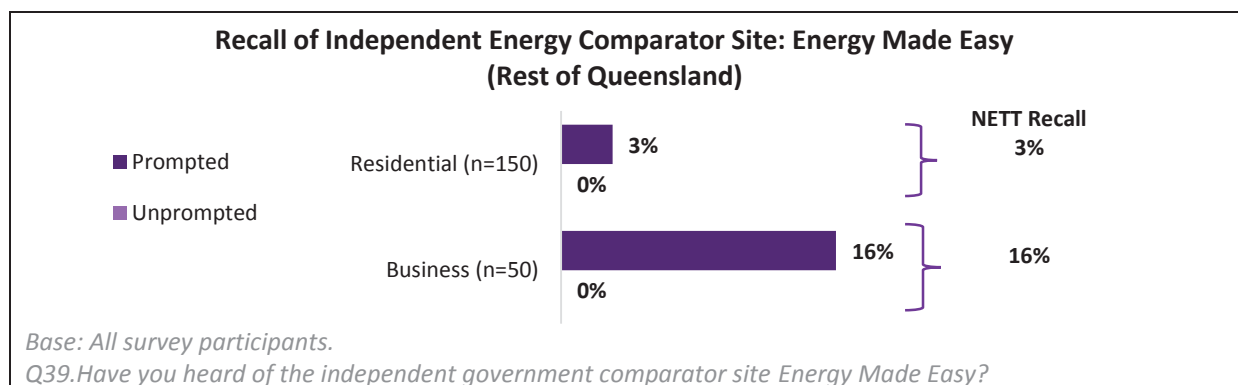
Without prompting, business consumers were most likely to recall One Big Switch (4%), followed by iSelect (2%), Compare the Market (2%) and Choosi (2%). There was no unprompted recall of the Energy Made Easy website.

A few of residential and business consumers made additional comments that because Ergon Energy is the only company they can choose from, they do not need to look at comparator websites.



Total recall of the price comparator website Energy Made Easy was low

Even when prompted with the name of the Energy Made Easy comparator website, very few residential consumers had heard of it (3%), while awareness was higher among businesses; at 16%.



On average, savings of \$235 on their electricity bill would prompt regional Queensland residents to seriously consider switching

All participants were asked how much they would need to save on their electricity bill for them to seriously consider switching their company or plan. The average amount among residents in regional Queensland was \$235 per year, ranging from an average of \$202 among those with a low bill, to \$258 for those with a high bill.

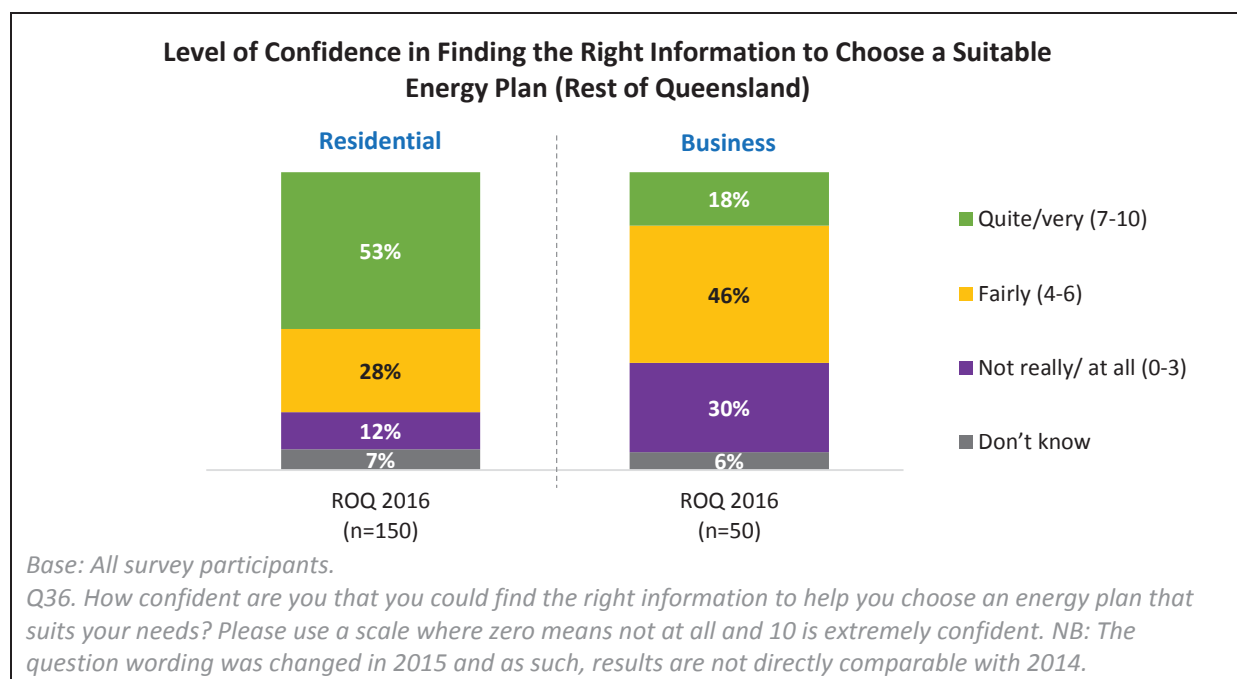
Amount Needed to Save Annually on Electricity Bill to Seriously Consider Changing (Average by Bill Size)	Rest of QLD Residential
	2016 (n=150)
Total	\$235
Last Quarterly Electricity Bill: Low	\$202
Last Quarterly Electricity Bill: Medium	\$255
Last Quarterly Electricity Bill: High	\$258

Base: All survey participants. NB: Residential: "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above. Business: "Low" is <\$500, "Medium" is \$500 to <\$1,000, "High" is \$1,000 and above. Results among business consumers not shown due to small sample size (n=50). Results among gas consumers not shown due to small sample size (residential: n=9, business: n=0).

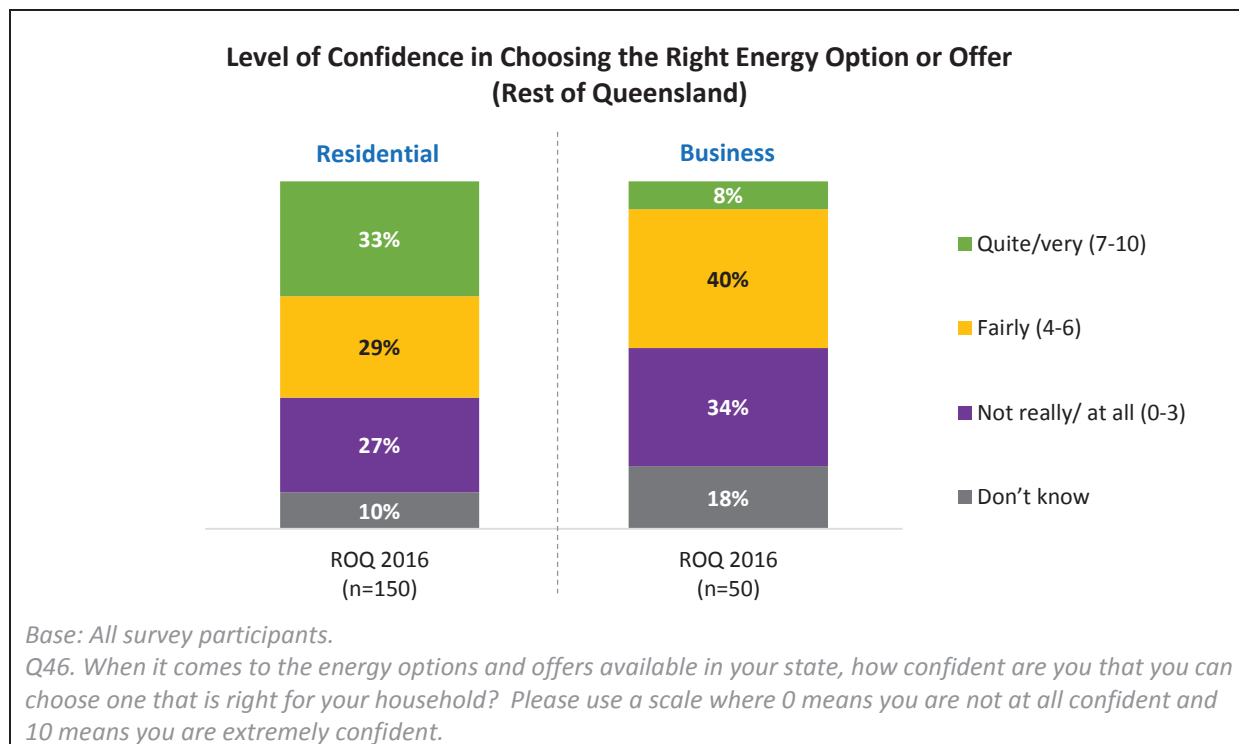
Q60. What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?

Residential consumers feel far more confident than business consumers in their ability to find the right information to choose a suitable energy plan

Consumers were asked to rate their confidence in finding the right information to choose a suitable energy plan. Residential consumers rated their confidence in finding the right information to choose a suitable energy plan much higher than business consumers, with just over half (53%) of residential consumers giving a high confidence rating of 7 or more out of 10, compared to fewer than one in five business consumers (18%). It is worth noting that these confidence levels are lower than in other jurisdictions, likely because most consumers in regional Queensland would not have experience with switching: e.g. 63% of residential consumers across the NEM (Victoria, New South Wales, the ACT, South Australia and South East Queensland) rated their confidence as 7 or higher, and 68% of business consumers.



Similarly, residential consumers were more confident than business consumers that they could actually choose the right energy option or offer for their household or business. One-third (33%) of residential consumers rated their confidence as 7 or more out of 10, compared with fewer than one in ten business consumers (8%). Confidence was also lower on this measure than across the NEM (residential: 61%, business: 68%).



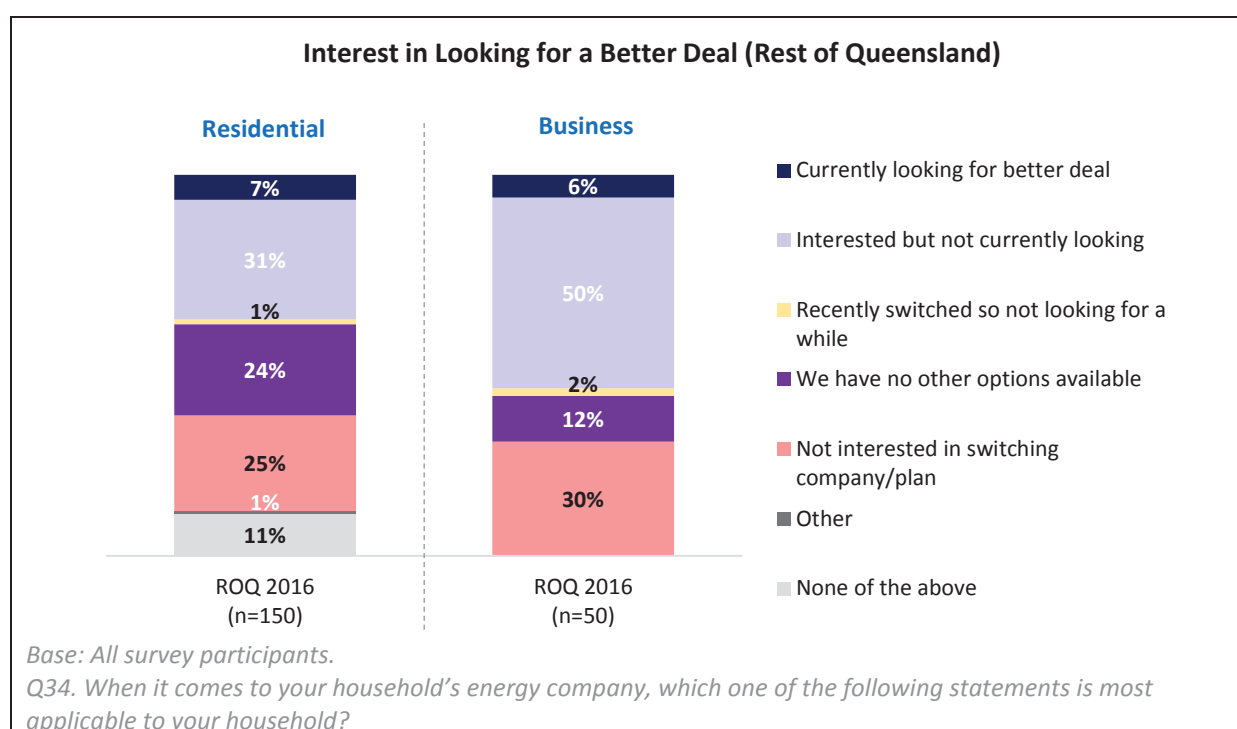
Many consumers in the rest of Queensland were interested in seeking a better deal

When asked about their current behaviours, around three in ten residential consumers (31%) were *interested in looking for a better deal but not currently looking* and a further 7% were *currently looking for a better deal*.

Proportionally more business consumers were *interested in looking for a better deal but not looking* (50%) and a further 6% were *currently looking*.

A quarter (25%) of residential consumers and 30% of business consumers were not interested in switching company or plan at all.

The question included an 'other (specify)' category and most of these responses were people noting that they have no other option available, which is shown in the chart as a standalone code (residential: 24%, business: 12%).



2B.2.2 Consumer Outcomes

Introduction

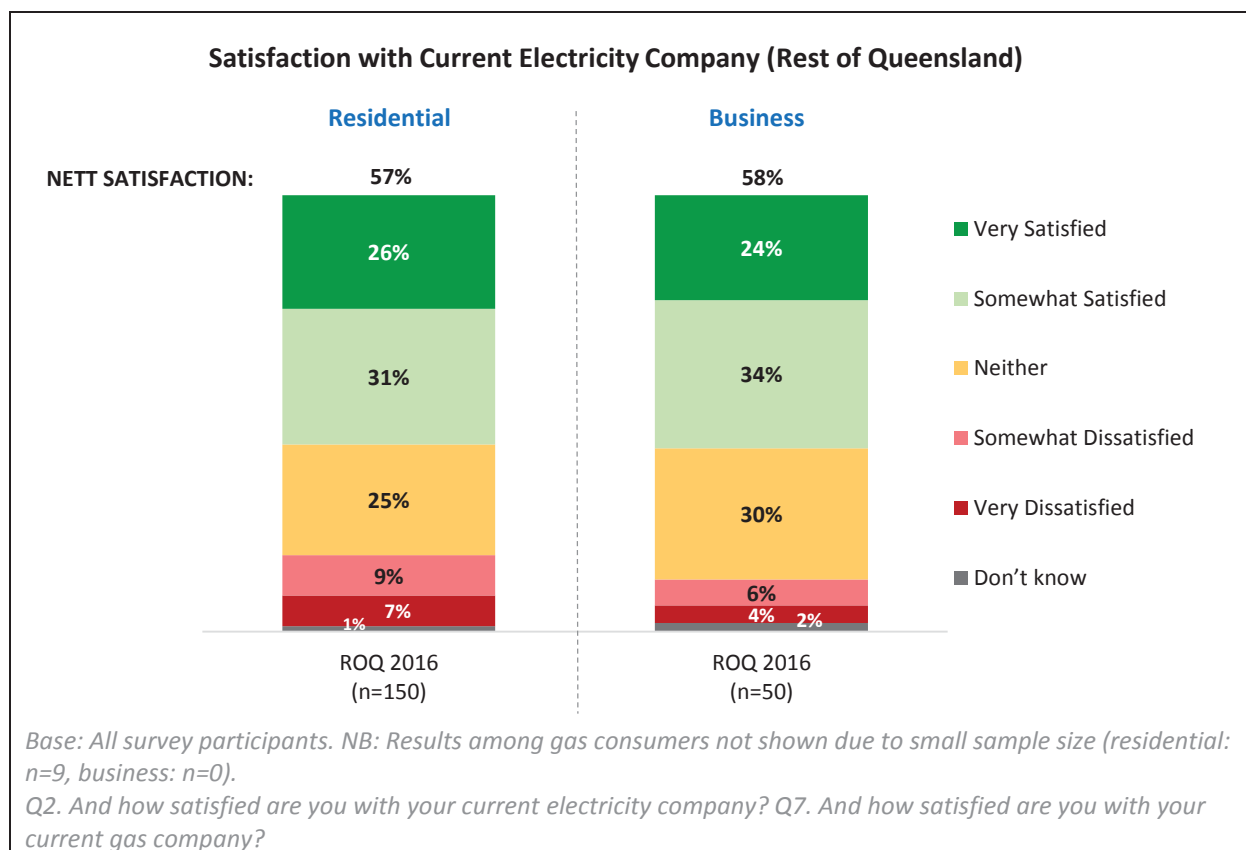
This section of the report details the findings on the rest of Queensland's consumers':

- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market; and
- Attitudes to switching.

The Results

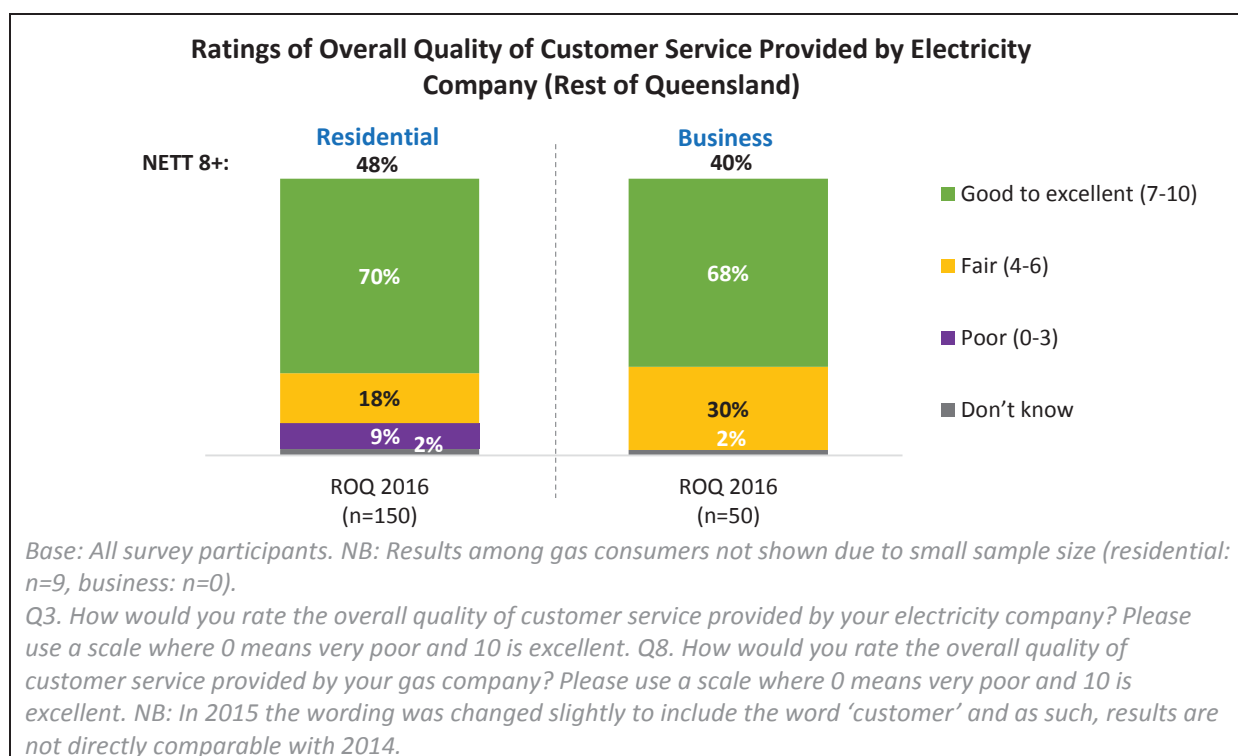
Almost three in five consumers in regional Queensland are satisfied with their electricity company

The majority of consumers in regional Queensland reported being satisfied with their electricity company (nett 57% residential and 58% business consumers somewhat / very satisfied). This is significantly lower than residential consumers in all other NEM jurisdictions, and the same is true among (nett 73% satisfied) and slightly lower for business consumers where somewhat fewer businesses were satisfied.

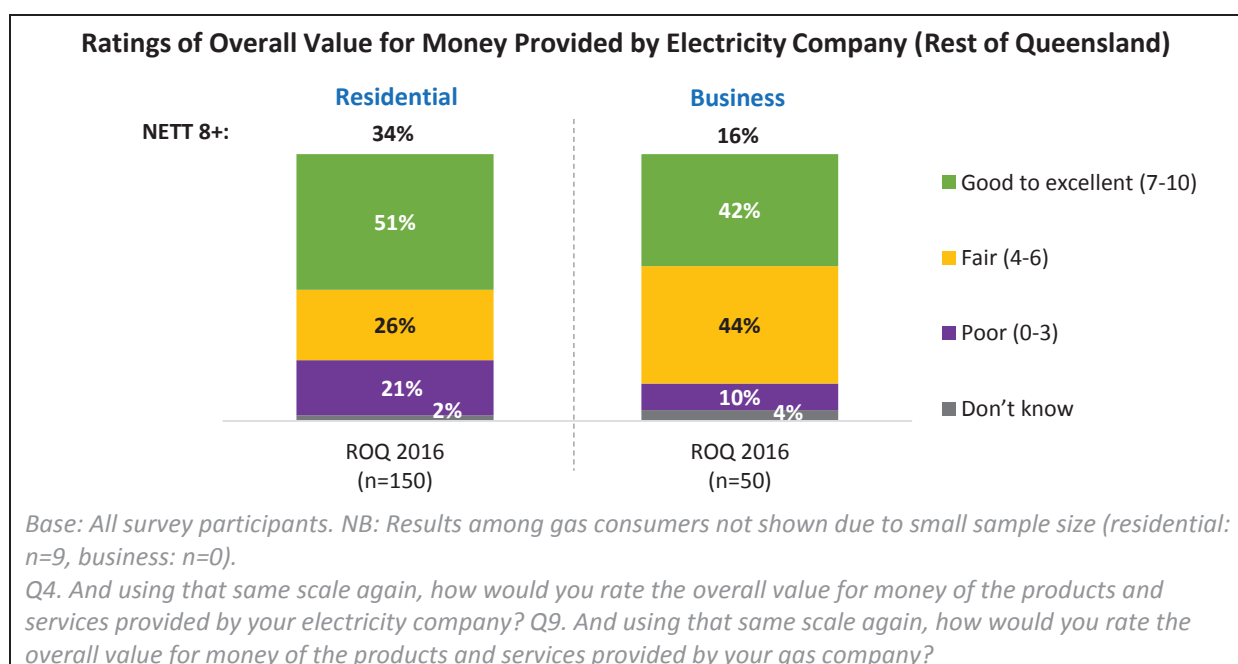


The majority rated the quality of customer service from their electricity company quite highly

Ratings of the overall quality of customer service provided by their electricity company were quite high among regional Queenslanders, with just under half of residential consumers (48%) rating their quality of service as 8 or more out of 10 and a similar 40% of business consumers.

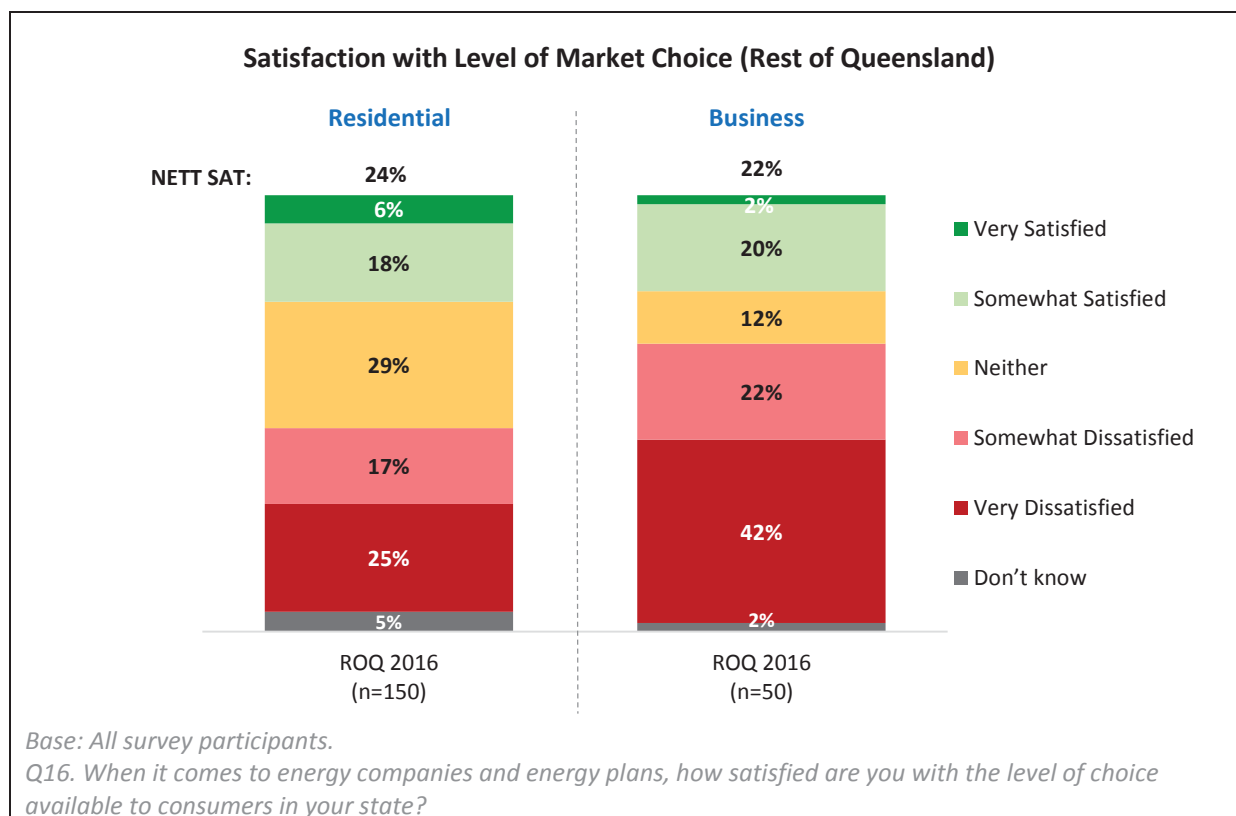


Ratings of the value for money provided by their electricity company (charted below) were lower than for customer service among both residential and business consumers (51% and 42% respectively gave a rating of a 7 or higher).



There were high levels of dissatisfaction with the level of market choice among consumers in the rest of Queensland

Participants were asked to indicate their satisfaction with the level of market choice in their State. When compared with NEM jurisdictions offering more / some choice, results were significantly lower among both residential consumers (24% nett somewhat / very satisfied vs. 64% in other NEM jurisdictions) and business consumers (22% vs. 65% respectively). Conversely, 42% of residents surveyed and 64% of businesses in regional Queensland were dissatisfied with the level of choice.



The majority of consumers were concerned about hidden fees and charges if they did switch

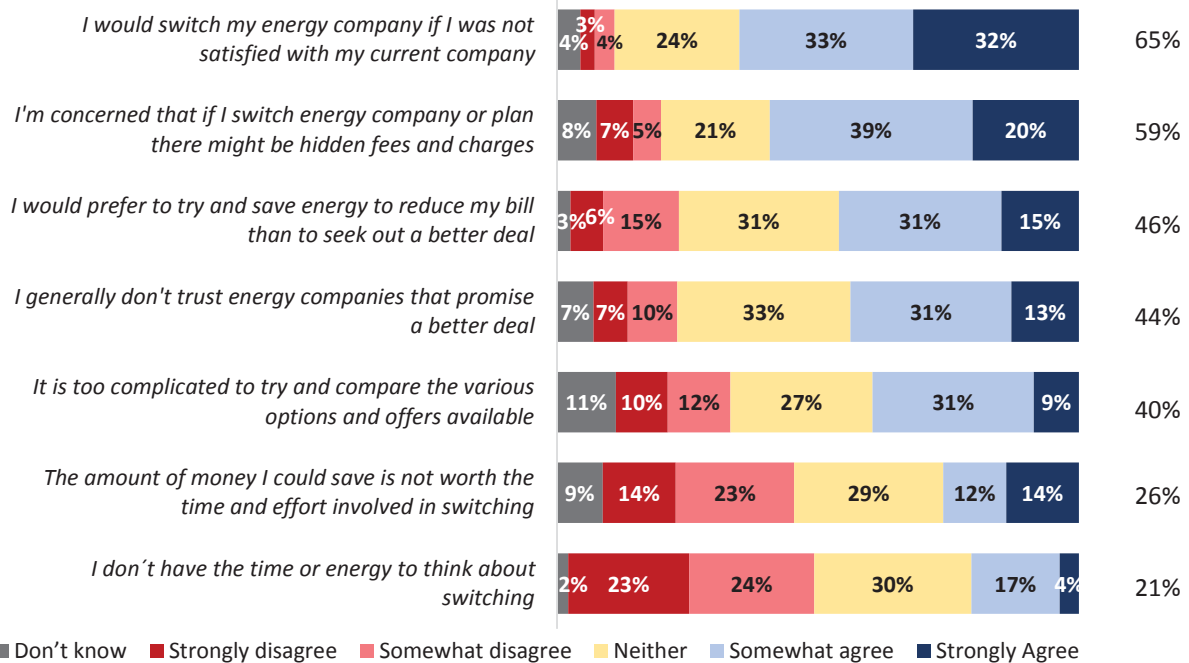
The charts over the page further explore market outcomes and consumer sentiment in regional Queensland, where survey participants were asked the extent to which they agreed or disagreed with several statements about switching. Despite the limited options in the rest of Queensland, the strongest agreement levels were in line with findings across other NEM jurisdictions, for the statements: *I would switch my energy company if I was not satisfied with my current company* (residential: nett 65% agree strongly / somewhat, businesses: 86%) and *I'm concerned that if I switch there will be hidden fees and charges* (residential: nett 59%, business: 76%).

Reflecting their interest in being offered choice and a better deal, agreement was the lowest for the statements: *the amount of money I could save is not worth the time and effort involved in switching* (26% of residential consumers and 46% of business consumers) and *I don't have the time or energy to think about switching* (21% residential, 46% small business).

Attitudes to Switching (Rest of Queensland)

Residential

NETT Agree



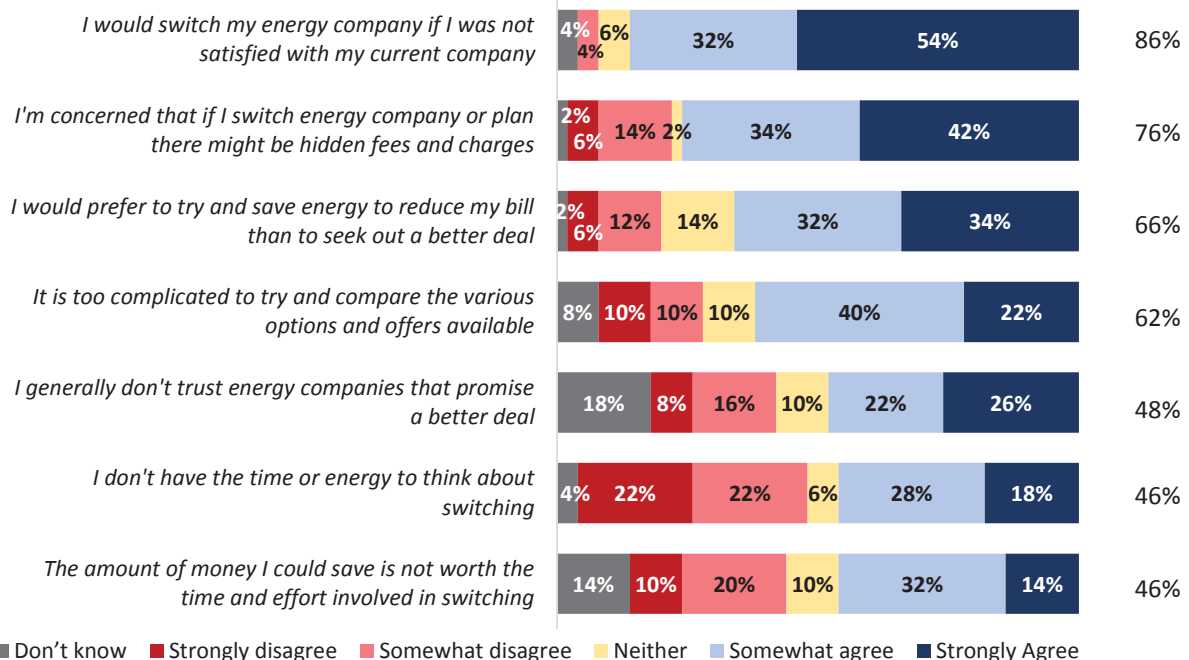
Base: All survey participants (n=150).

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...

Attitudes to Switching (Rest of Queensland)

Business

NETT Agree



Base: All survey participants (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...



NEW SOUTH WALES



NEWGATE
RESEARCH

3 New South Wales

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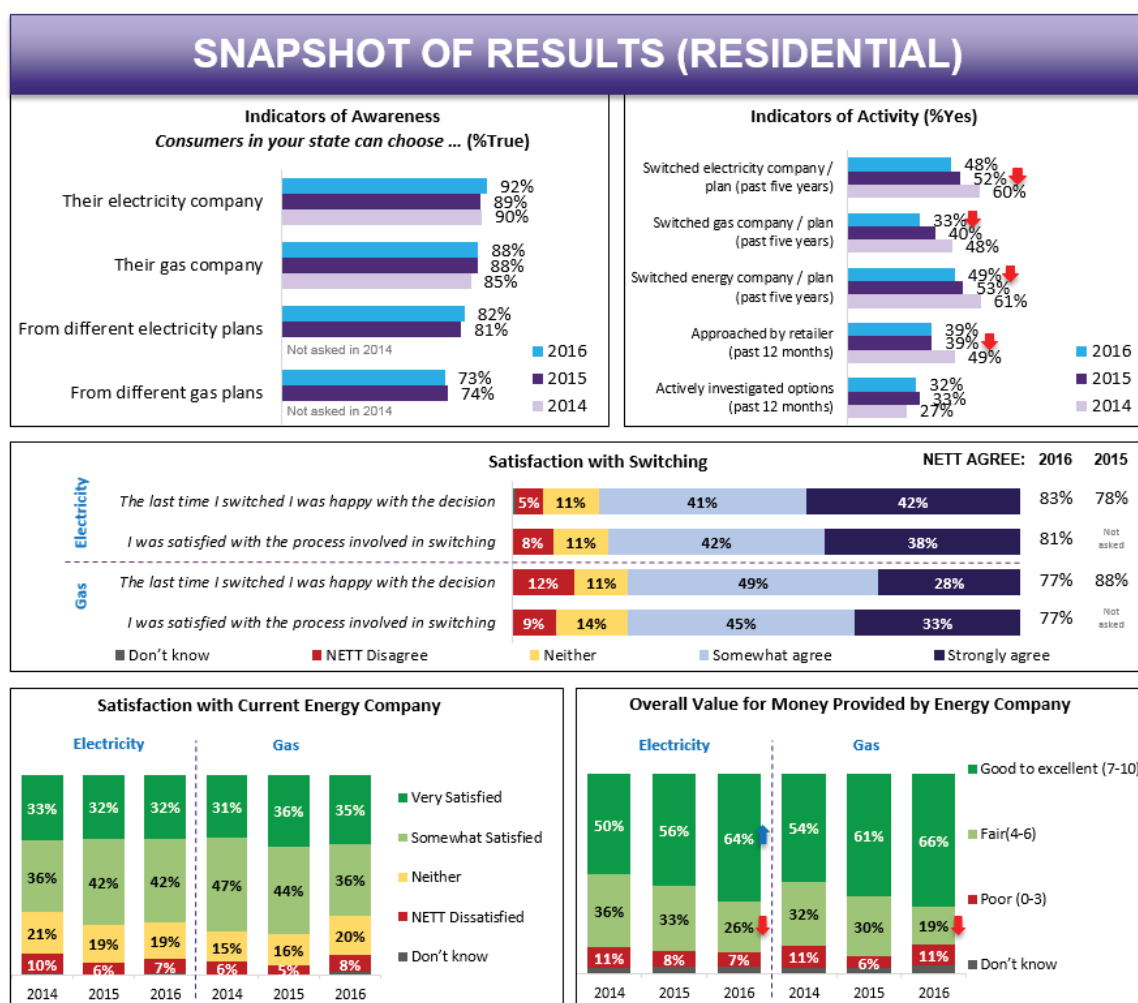
3.1 Snapshot of Results

New South Wales (NSW) consumers' awareness of their ability to choose different energy companies and offers remains high. Confidence is building, particularly among small businesses, with more consumers feeling confident they can find the right information about energy offers and deals, and that they could choose the right one for them – i.e. 62% of residential consumers and 72% of small business consumers rated their confidence in choosing the right option as 7 or more out of 10. Awareness of comparator websites remains low, especially for the State Government's sites; only around one in ten recalled them when prompted. However, comparator websites were cited as the most useful source of information among business consumers (42%) and the second most useful among residential consumers (14%) after Google or another internet-based source (26%).

Switching rates in the past five years across energy companies and plans have declined in NSW – significantly among residential consumers and marginally among small businesses. Satisfaction remains quite high among those who had switched electricity company, with most agreeing that they were happy with their decision to switch.

Overall satisfaction with their current electricity company remained stable against 2015, while there was a slight decline in satisfaction with gas companies for both residential and business customers.

Looking ahead, around half of those surveyed were again either seeking or interested in seeking a better deal. Also in line with 2015 results, most agreed they would switch energy company if they were not satisfied with their current company (residential: 79%, businesses: 82%).



3.2 Key Findings

3.2.1 Consumer Activity

Introduction

This section of the report details the survey findings on NSW consumers’:

- Awareness and knowledge of their options in energy markets;
- Incidence and time spent investigating energy deals and offers in the last year;
- Reasons for *not* investigating different offers and options;
- Reported ease of comparing different offers and options;
- Used and preferred information sources for investigating different offers and options;
- Awareness of comparison websites – unprompted and prompted;
- Rates of switching energy company, plan and/or deal and the incidence of sales approaches from energy companies;
- Reasons for consumers not switching energy company or plan after investigating their options;
- Drivers: unprompted motivations and the level of importance of various factors in the decision to switch company/plan, and dollar savings needed for consumers to seriously consider switching; and
- Current behaviours – whether currently looking or interested in seeking a better deal.

The Results

Most NSW consumers know they can choose their own energy company or plan, and that they have a choice between different energy offers and plans

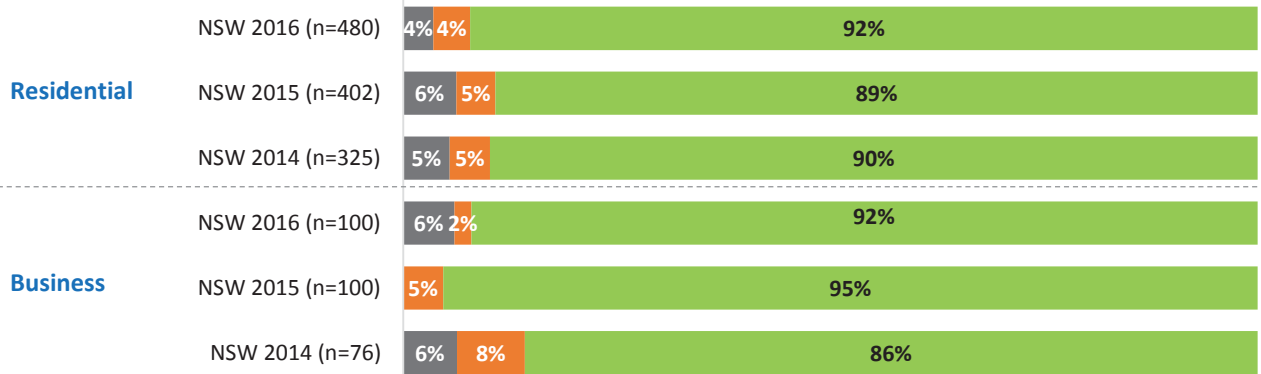
As charted on the following page, consistent with previous years, the vast majority of consumers surveyed in NSW were aware they could choose both their electricity company (residents: 92%, small businesses: 92%), and their gas company (88% of residential consumers and 87% of small businesses).

Business consumers’ awareness of the ability to choose their gas company declined slightly from 94% in 2015 but remains higher than the benchmark of 72% in 2014. However, these changes are not statistically significant – likely due to the small sample sizes of mains connected businesses (results not charted due to fewer than n=30 in each year).

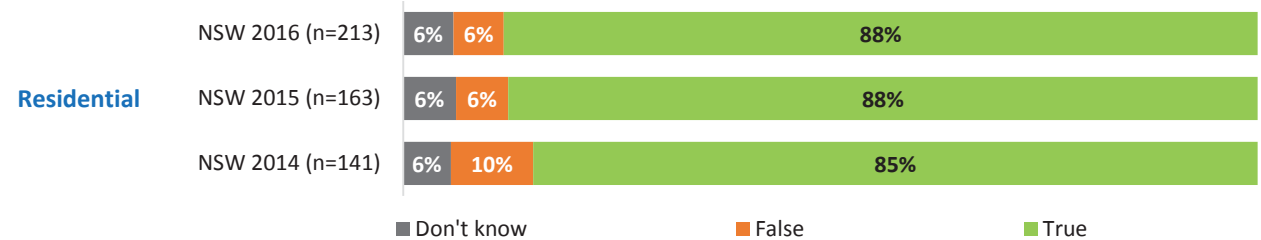
Awareness of the option to choose different energy plans, price structures, contract lengths and terms remained lower and stable among *residential* consumers against the 2015 benchmark results (82% of electricity consumers and 73% of gas consumers in 2016). Among business consumers, awareness of the ability to choose *electricity* plans and options was also steady (86%), with a small (but not significant) decrease regarding gas plans (from 86% to 82% - also not charted due to the very small sample sizes).

Awareness of Ability to Choose Energy Company (New South Wales)

Consumers can choose their electricity company



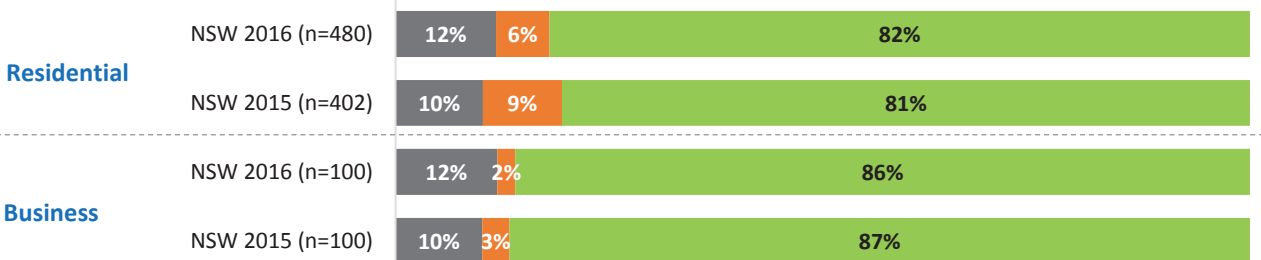
Consumers can choose their gas company



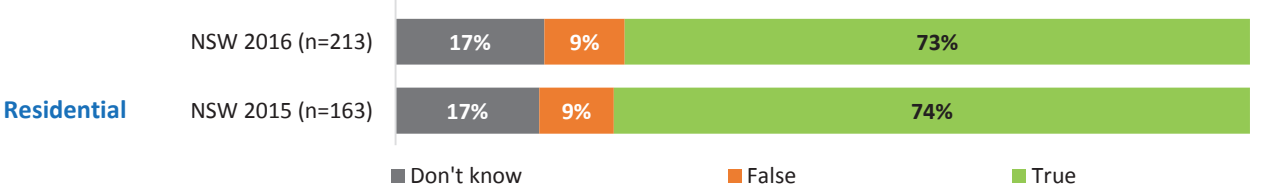
Base: All survey participants. NB: Results for business gas consumers not shown due to small sample size: 2016 (n=23). Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state can choose their electricity company. b) Consumers in your state can choose their gas company.

Awareness of Ability to Choose From Different Energy Plans, Offers Etc. (New South Wales)

Consumers can choose their electricity plans and options



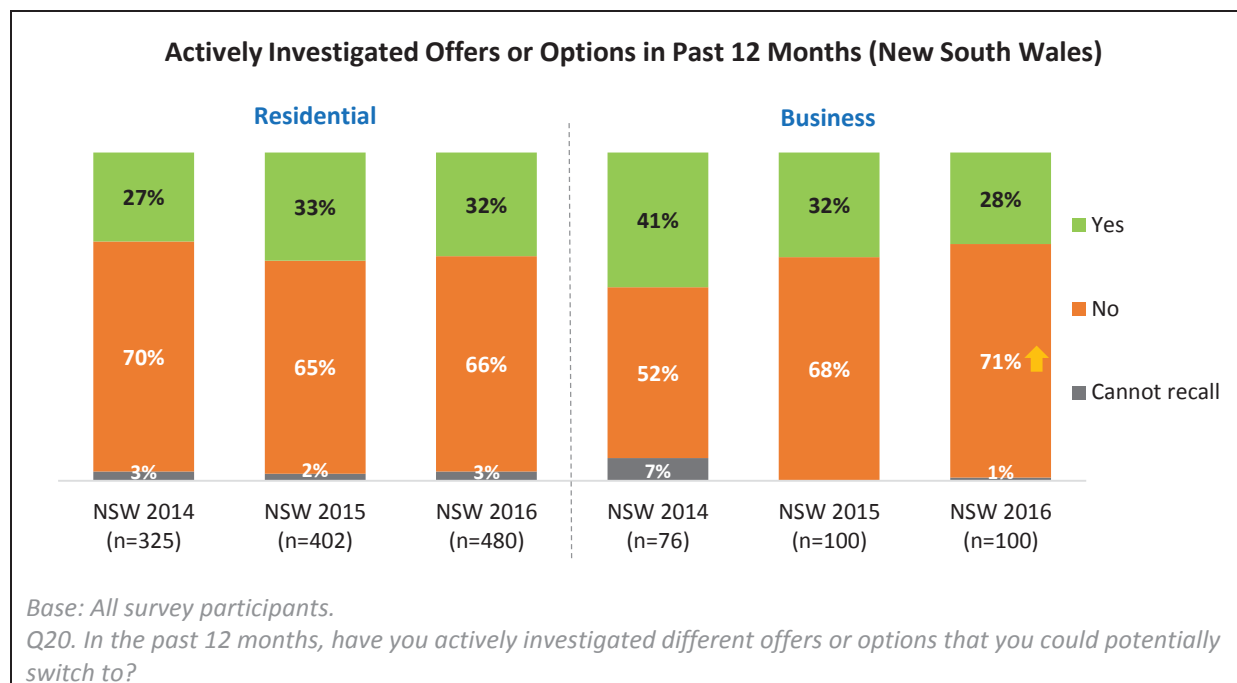
Consumers can choose their gas plans and options



Base: All survey participants. NB: Results for business gas consumers not shown due to small sample size: 2016 (n=23). Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state can choose from a range of different types of electricity plans, price structures, contract lengths and terms. d) Consumers in your state 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.

Around a third of NSW consumers had actively investigated offers or options, with the majority spending no more than two hours doing so

Broadly in line with previous results, around a third of residential consumers in NSW (32%) had actively investigated offers or options they could potentially switch to in the past 12 months. While not statistically significant, the proportion of small business consumers who had actively investigated alternatives continued to decline (from 41% in 2014, down to 28% in 2016).



The most common reason consumers gave for not investigating options in the past 12 months was again satisfaction with their current retailer or arrangements

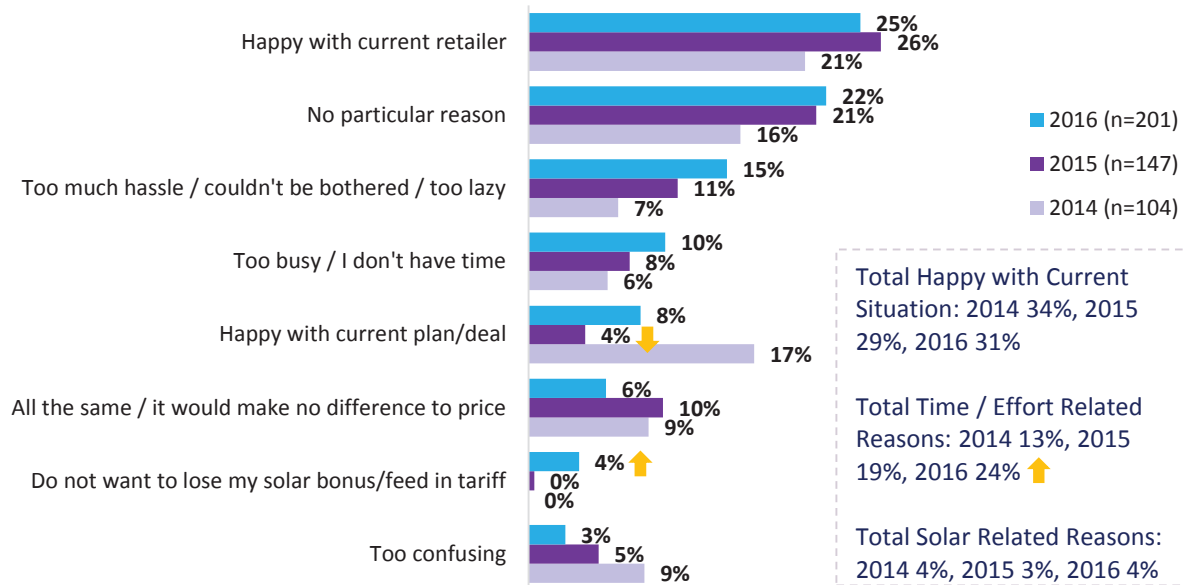
Among *residential* consumers who had not investigated options or switched provider or plan, the main unprompted (and subsequently manually coded) reasons were similar to previous years. The results are charted over the page. Most notably, they were happy with their current retailer, at 25%. The proportion considering it to be too much of a hassle or that they couldn't be bothered has doubled since the benchmark (from 7% to 15%) though this increase is not statistically significant.

Lower level reasons included being too busy (10%) or happy with their current plan/deal (8%, which remains significantly down since the benchmark of 17% in 2014). There is, however, a trending increase in nett mentions of time and energy related reasons for not investigating or switching (from 13% in the benchmark to 24% in 2016).

In 2016, mentions of not wanting to lose their solar bonus were significantly higher than in the two years prior (4% in 2016, and 0% in 2014 and 2015), but when looking at all solar related reasons the results are stable over time (nett 4% in the 2014 benchmark and 4% in 2016).

Main Reasons for Not Investigating or Switching (New South Wales) Unprompted, Top Mentions 3%+

Residential



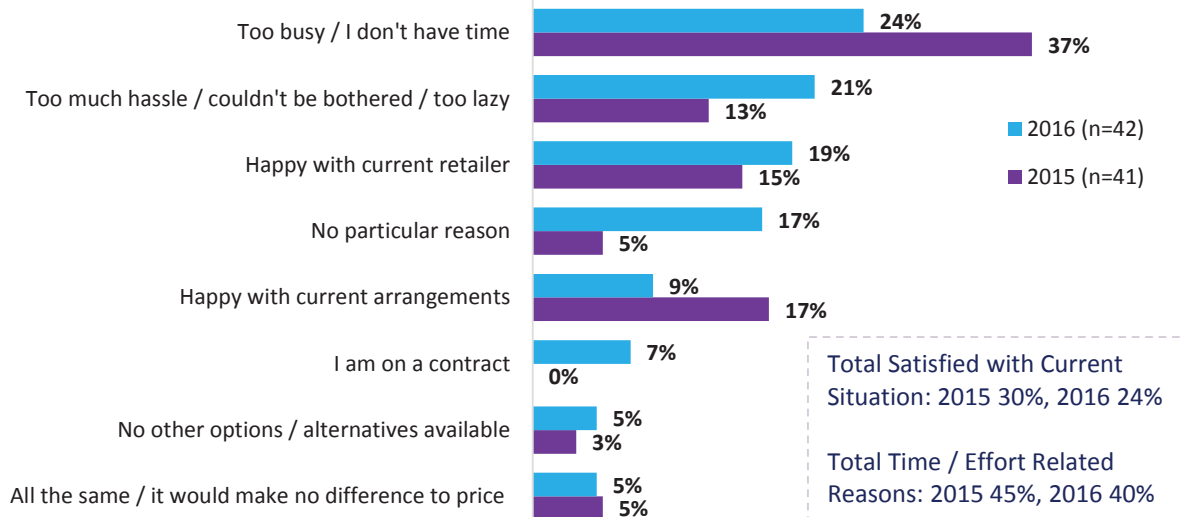
Base: Participants who had not investigated offers and options or switched in the past 12 months.

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.

Among *business* consumers who had neither investigated options nor switched provider or plan, the main reasons given were similar – i.e. that they were too busy (24%), it was too much of a hassle / 'couldn't be bothered' (21%), or they were happy with their current retailer (19%).

Main Reasons for Not Investigating or Switching (New South Wales) - Unprompted. Top Mentions 3%+

Business

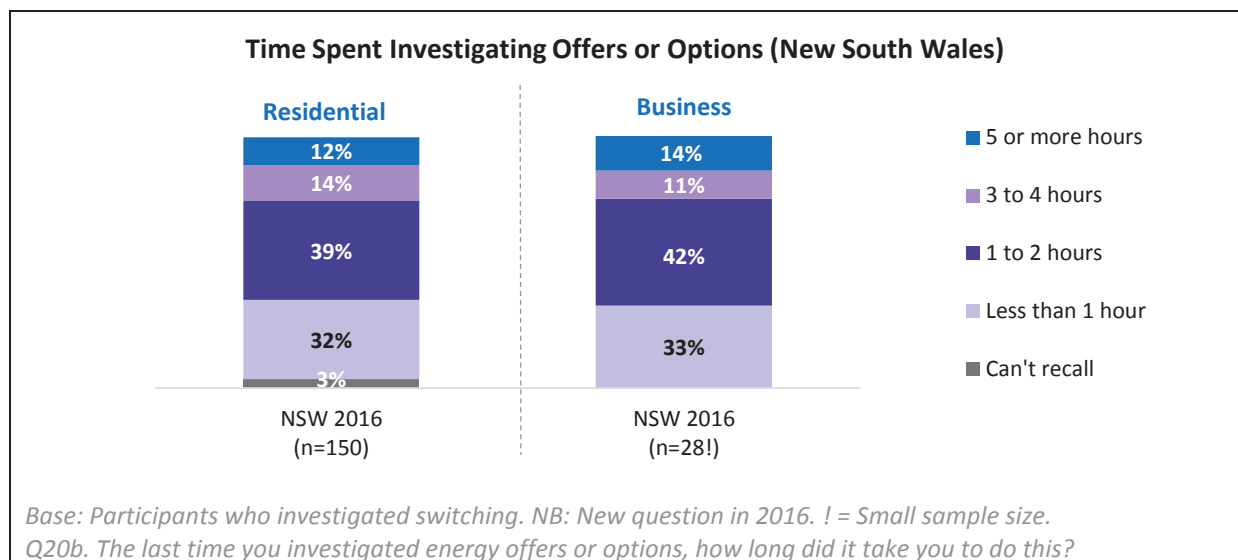


Base: Participants who had not investigated offers and options or switched in the past 12 months. NB: 2014 results not shown due to small sample size (n=10).

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? MULTIPLE RESPONSE.

The majority spent no more than two hours investigating their options

In a new question to understand time investments, the majority of consumers who did investigate their options and available offers estimated that they spent no more than two hours doing so: 71% of residents and 75% of business consumers. Just 12% of residential consumers and 14% of small business consumers thought they had spent five or more hours doing so.

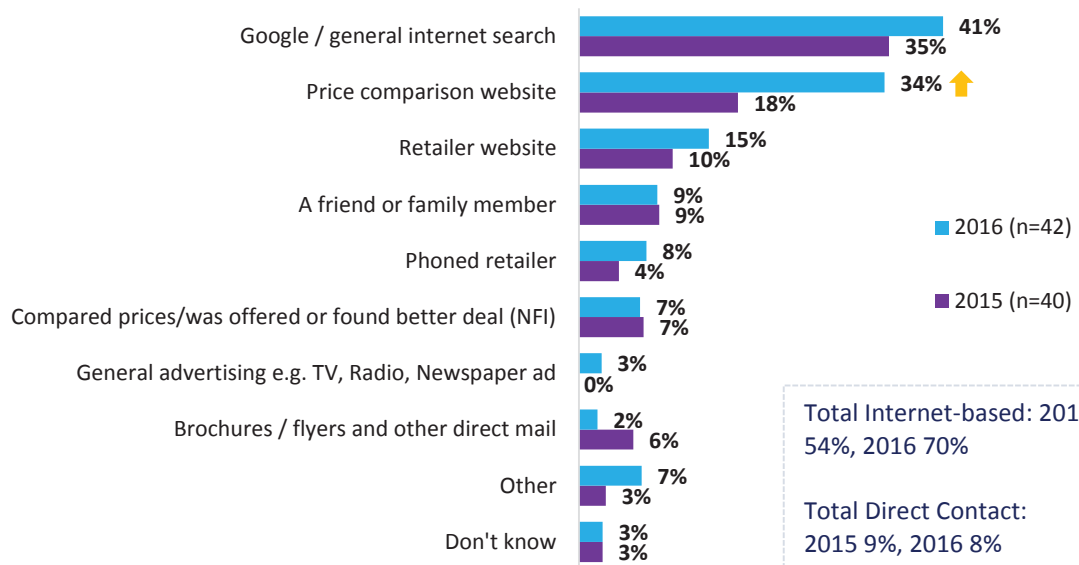


Comparison websites have grown in popularity and usefulness among non-switchers

The chart over the page shows that among residential consumers who had investigated offers and options in the last 12 months but had not switched in the last five years, the main information sources used were again Google or other general internet-based searches (41% vs. 35% in 2015) and price comparison websites, which almost doubled (from 18% in 2015 up to 34%), though this was not statistically significant due to the small sample size. The most popular sources also remained the most useful information sources to help these consumers decide whether or not to switch: i.e. Google or other internet-based searching (26% vs. 19% in 2015), price comparison websites (14% vs. 12%) and retailer websites (9% vs. 6%).

Main Information Sources Used to Investigate Different Offers and Options (New South Wales) - Unprompted

Residential

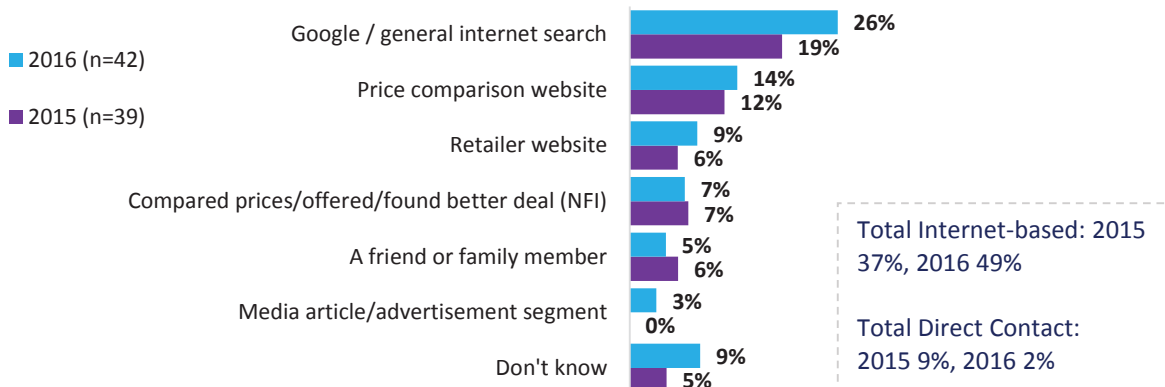


Base: Participants who had investigated offers or options but had not switched. NB: 2014 results not shown due to small sample size (n=16). Business results not shown due to small sample size (n=13).

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.

Most Useful Information Source Used to Help Decide Whether or Not to Switch (New South Wales) - Unprompted

Residential



Base: Participants who had investigated offers or options but had not switched.

NB: Question not asked in 2014. Business results not shown due to small sample size (n=9).

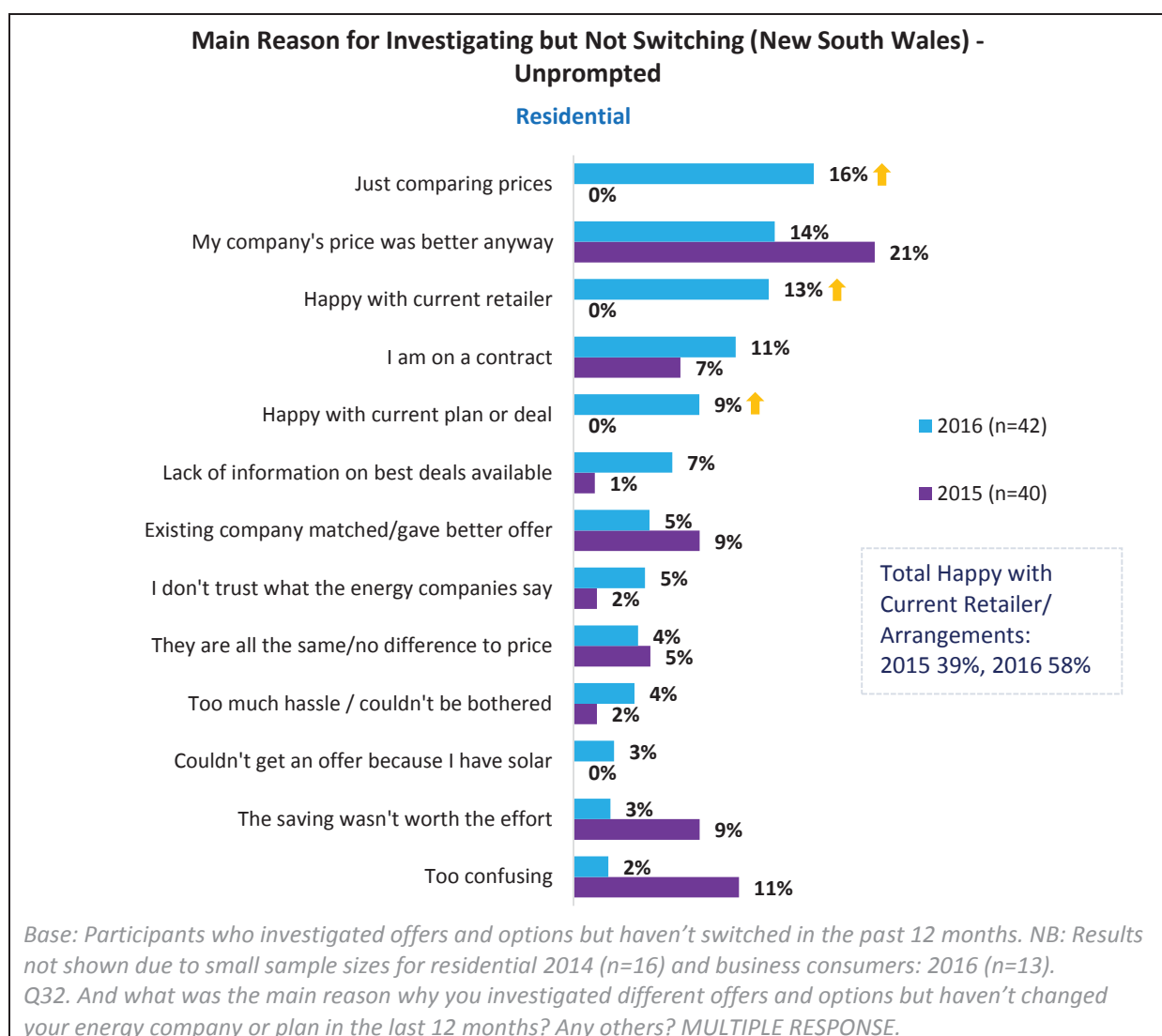
Q57. And thinking about the information sources you used when investigating different offers or options, which one was most useful in helping with your decision whether or not to switch?

Lack of a better value proposition was again the main reason for investigating but not switching

Among residential consumers, the main reason for not switching despite investigating in the past 12 months was not mentioned in 2015 – i.e. for this review, the top mention was ‘just comparing prices’ (16%).

The other main reasons included finding that their own company had a better price anyway (14% in 2016, although down from 21% in 2015) or being happy with the current retailer (13%, also a new code). Whilst the chart below shows some *statistically* significant differences from 2015 it is important to note the small sample sizes here – e.g. for ‘just comparing prices’ this difference actually represents just n=7 participants.

When grouping the response themes, nett 58% indicated that they didn’t go on to switch because they found that their current arrangements were acceptable – showing that a lack of a better value proposition was the overarching reason for not switching.

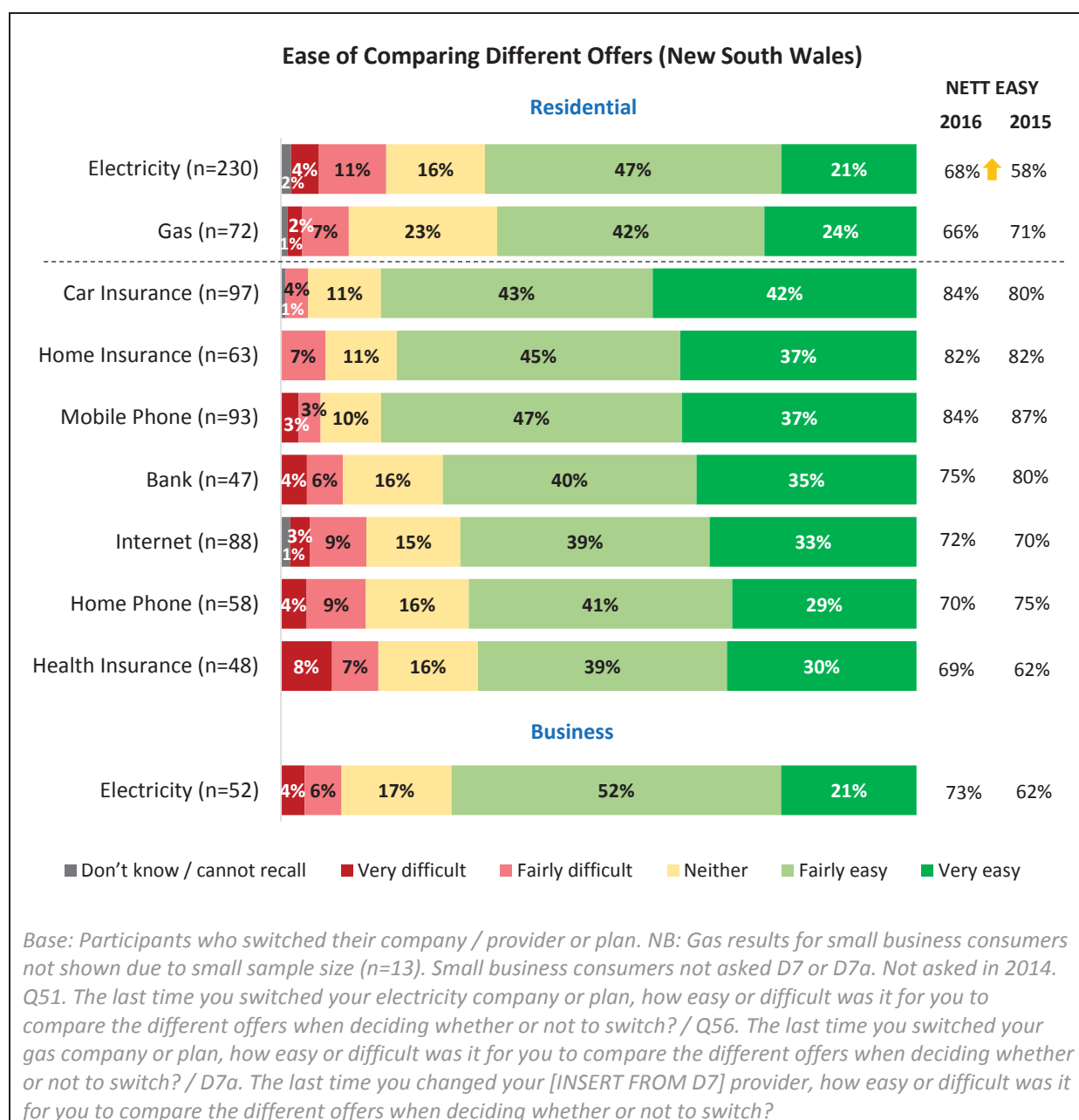


More switchers found it easy to compare electricity offers and options than in 2015

Compared with 2015, there has been a significant increase among residential consumers who did switch electricity company or plan who found it fairly or very easy to compare offers and options (68% in 2016 vs. 58% in 2015). Whilst not a statistically significant difference, more business consumers also thought it was easy to compare electricity offers and options (from 62% in 2015 to 73%).

The ease of comparing *gas* offers was relatively stable among residential gas switchers: 66% thought this was fairly or very easy to do vs. 71% in 2015.

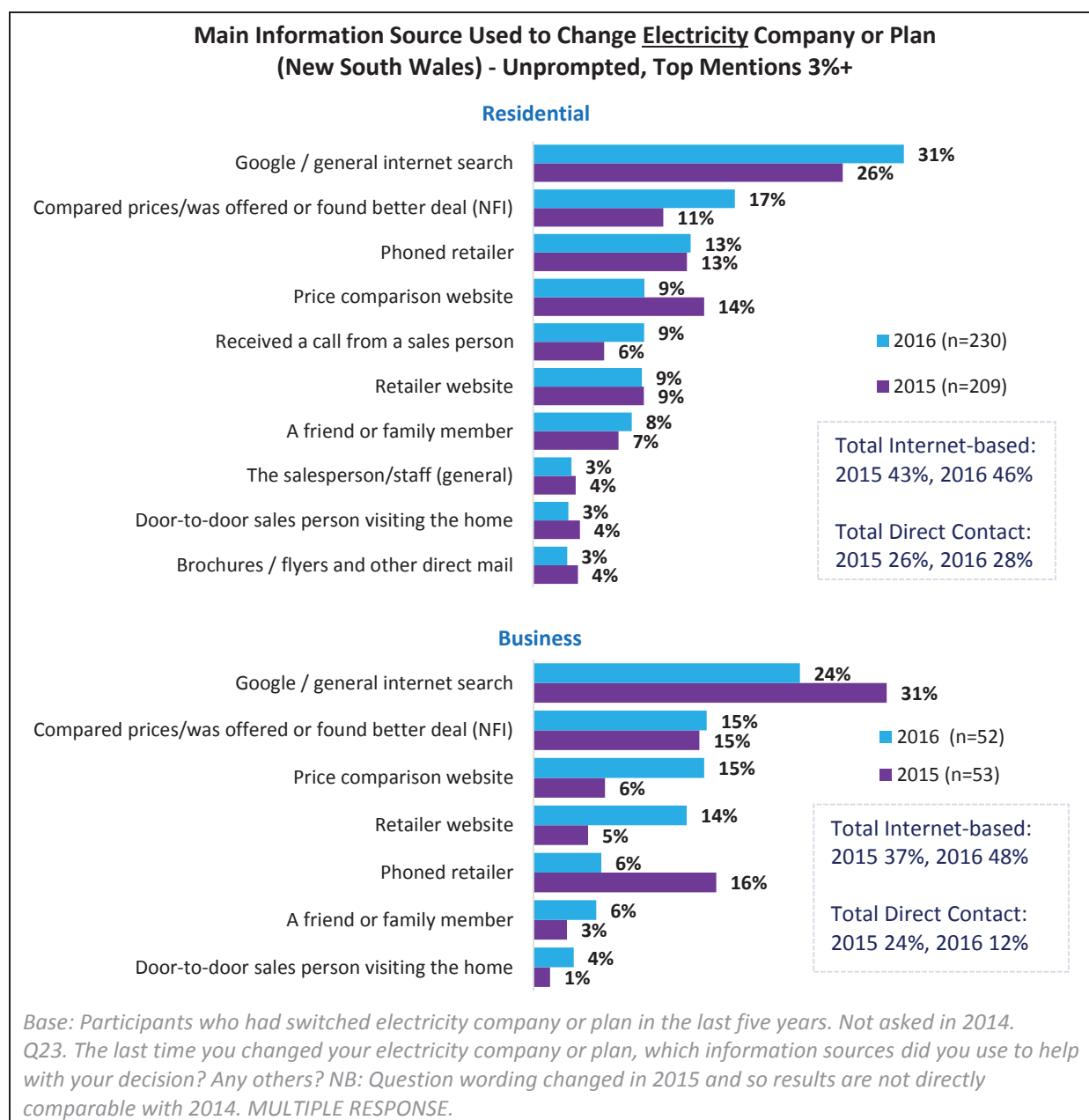
As in 2015, residential switchers generally found it easier to compare offers for all of the other services asked about than electricity and gas, including home and car insurance, banking and communications – especially when considering the proportions who rated these as ‘very easy’. Indeed one in six (15%) thought it was fairly or very *difficult* to compare electricity offers in particular.



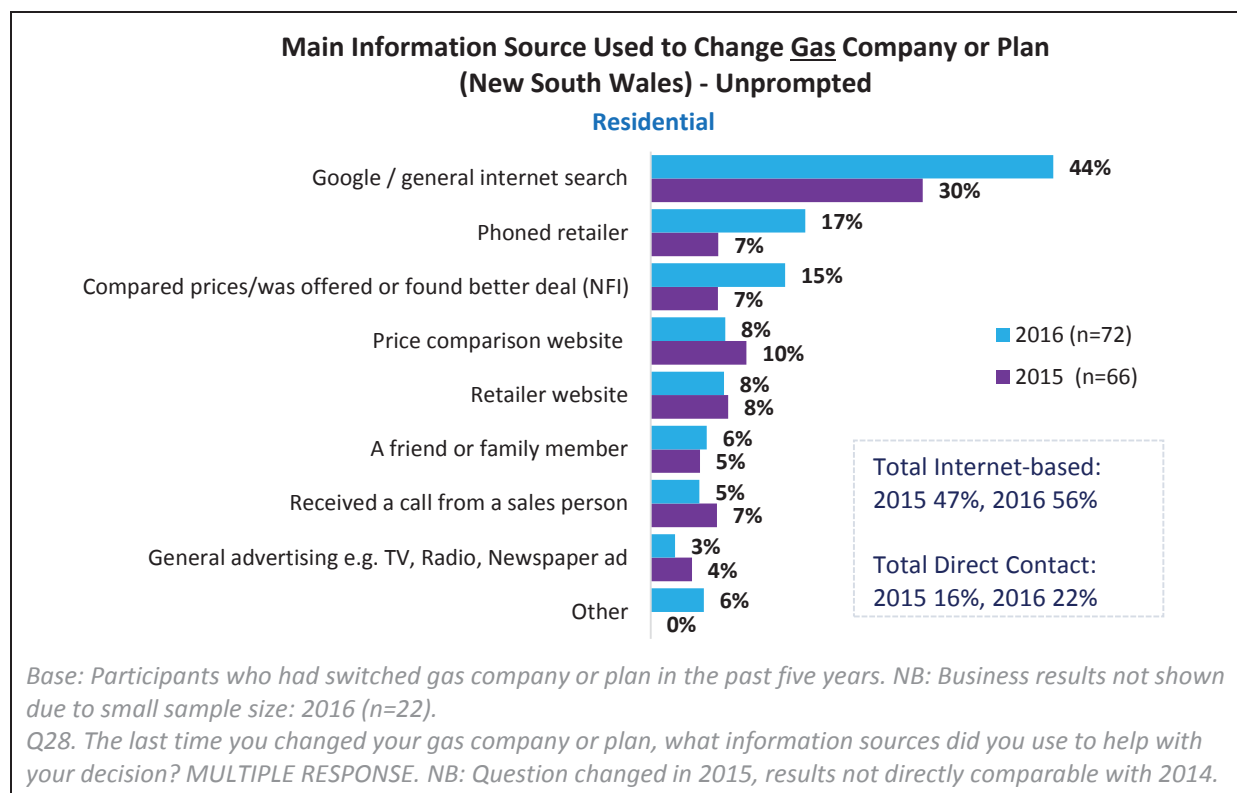
Among switchers, the internet remained the most used – and most useful – information source to help them decide to switch energy company or plan

There were no significant changes in the main information sources used by consumers who switched *electricity* company or plan. Again the main source among residential consumers was Google / internet-based searching (31%). Comparing prices or being offered a better deal was a slightly more prominent information source (17%, up from 11%), while phoning a retailer was unchanged (13%).

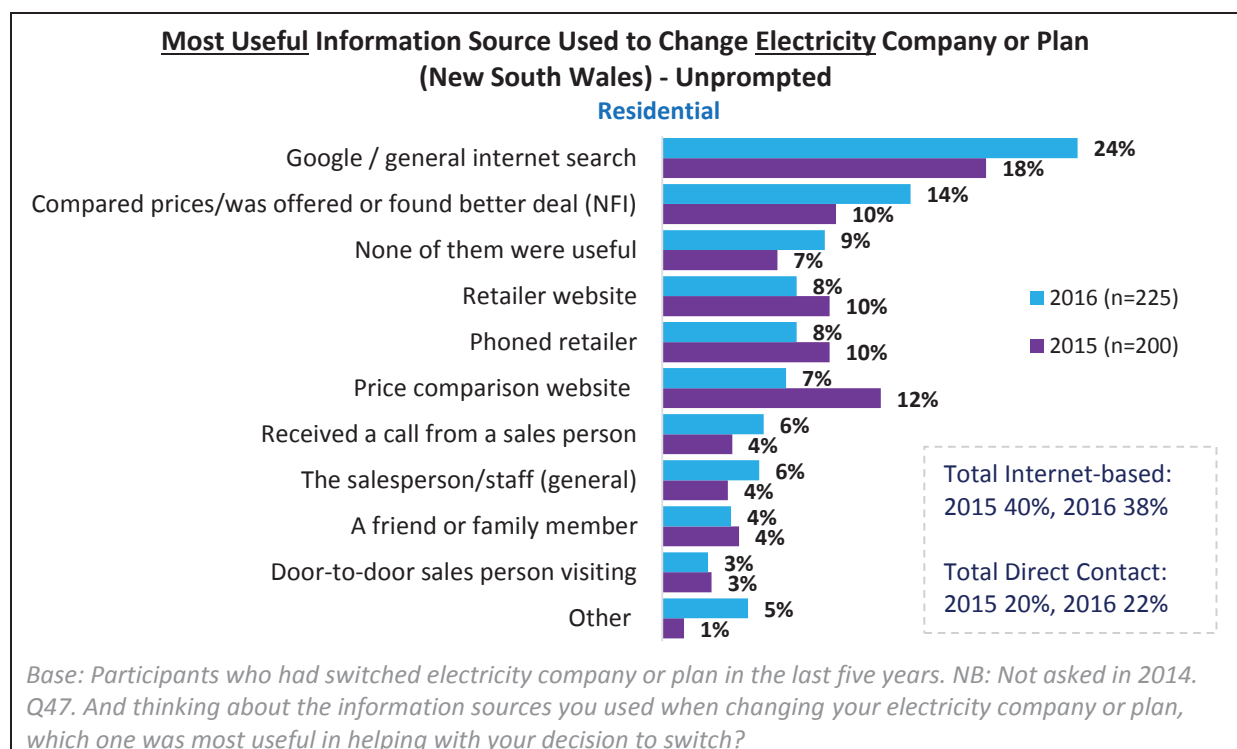
The top source among small business consumers was also Google / internet searches (24%), and nett use of internet-based sources such as price comparison and retailer websites increased to almost half of all small business consumers (from 37% in 2015 to 48%), while direct contact halved to 12%.



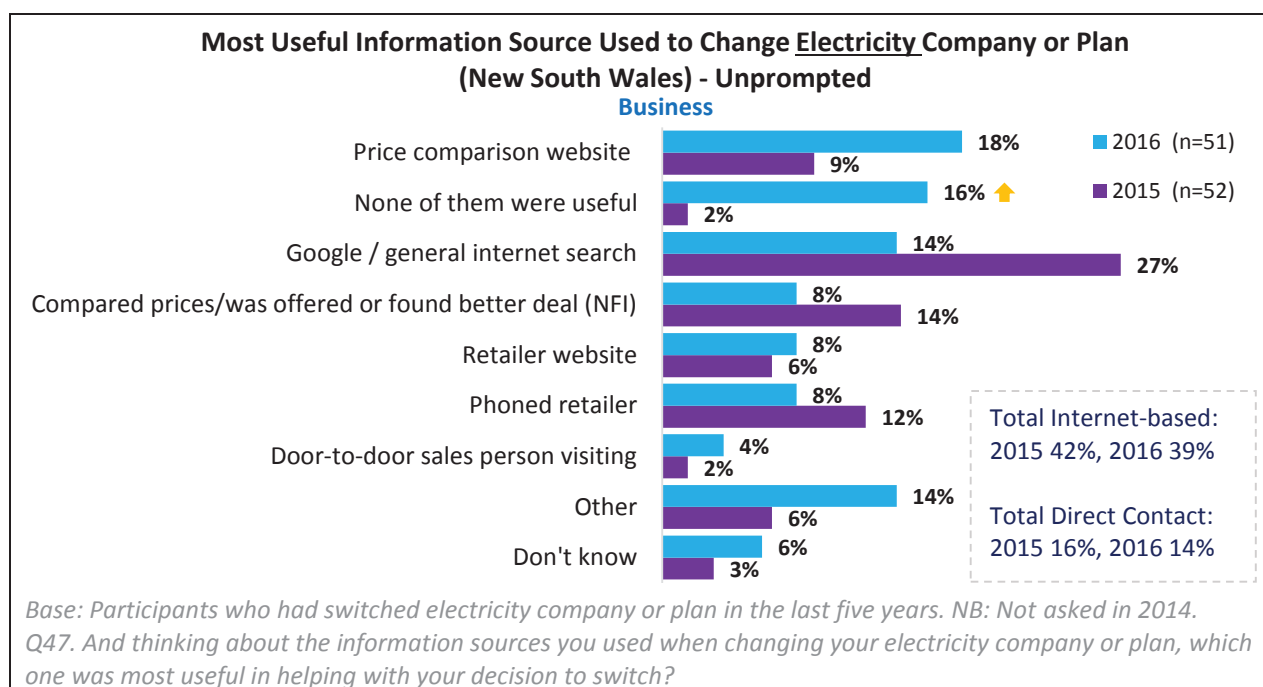
More residential gas switchers in NSW used Google or a general internet search to help inform their decision to switch gas company or plan (up from 30% in 2015 to 44%). Secondary information sources for gas offers were phoning a retailer (17%, up from 7%), and comparing prices or being offered a better deal (15%, up from 7%).



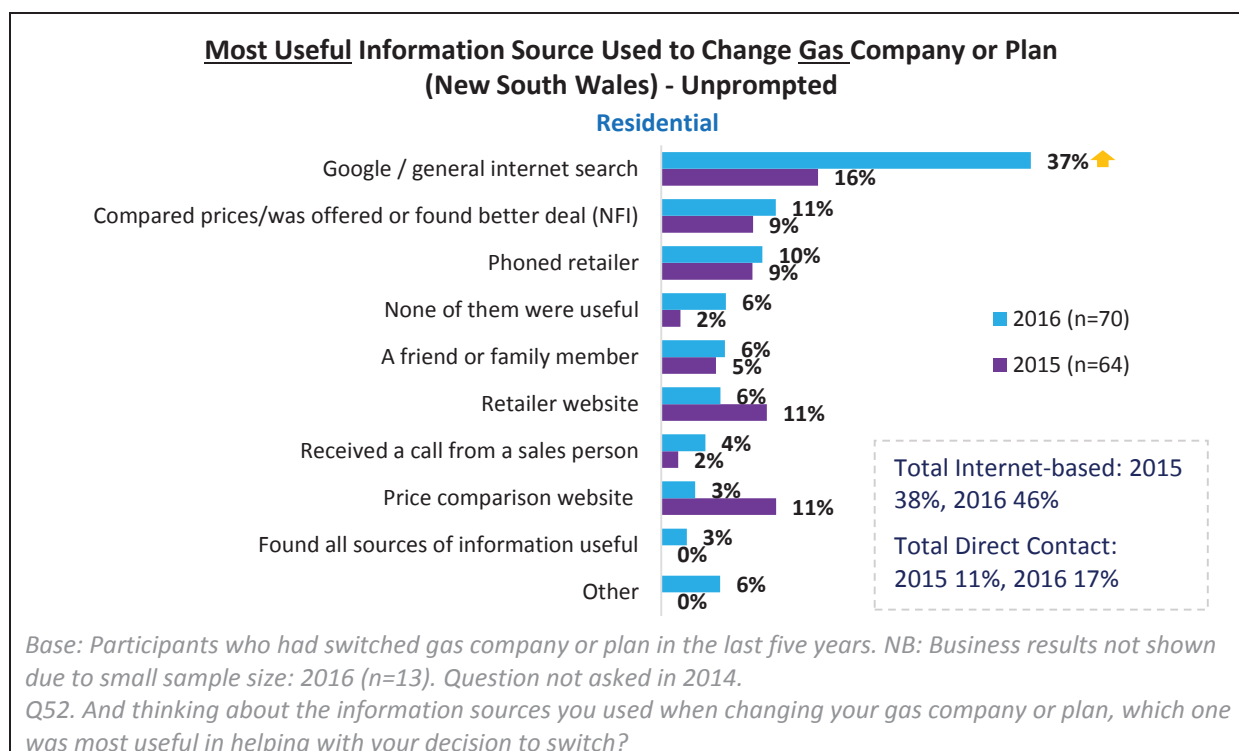
Consumers who had switched an energy company or plan were also asked which information source they thought was most useful. For residential electricity switchers, internet-based sources remained the most useful (nett 38% in 2016 vs. 40% in 2015). There was a slight decline in mentions of price comparison websites on 2015 results (from 12%, down to 7% in 2016).



The most useful information source for *business* consumers who had switched electricity company or plan was price comparison websites (18%, up from 9%). There was an increase in the proportion who indicated that none of the information sources were useful, from 2% in 2015 to 16% in this review). Despite a decline, Google or internet-based searches were still seen as relatively useful sources among small businesses (from 27% in 2015 to just 14% this year).



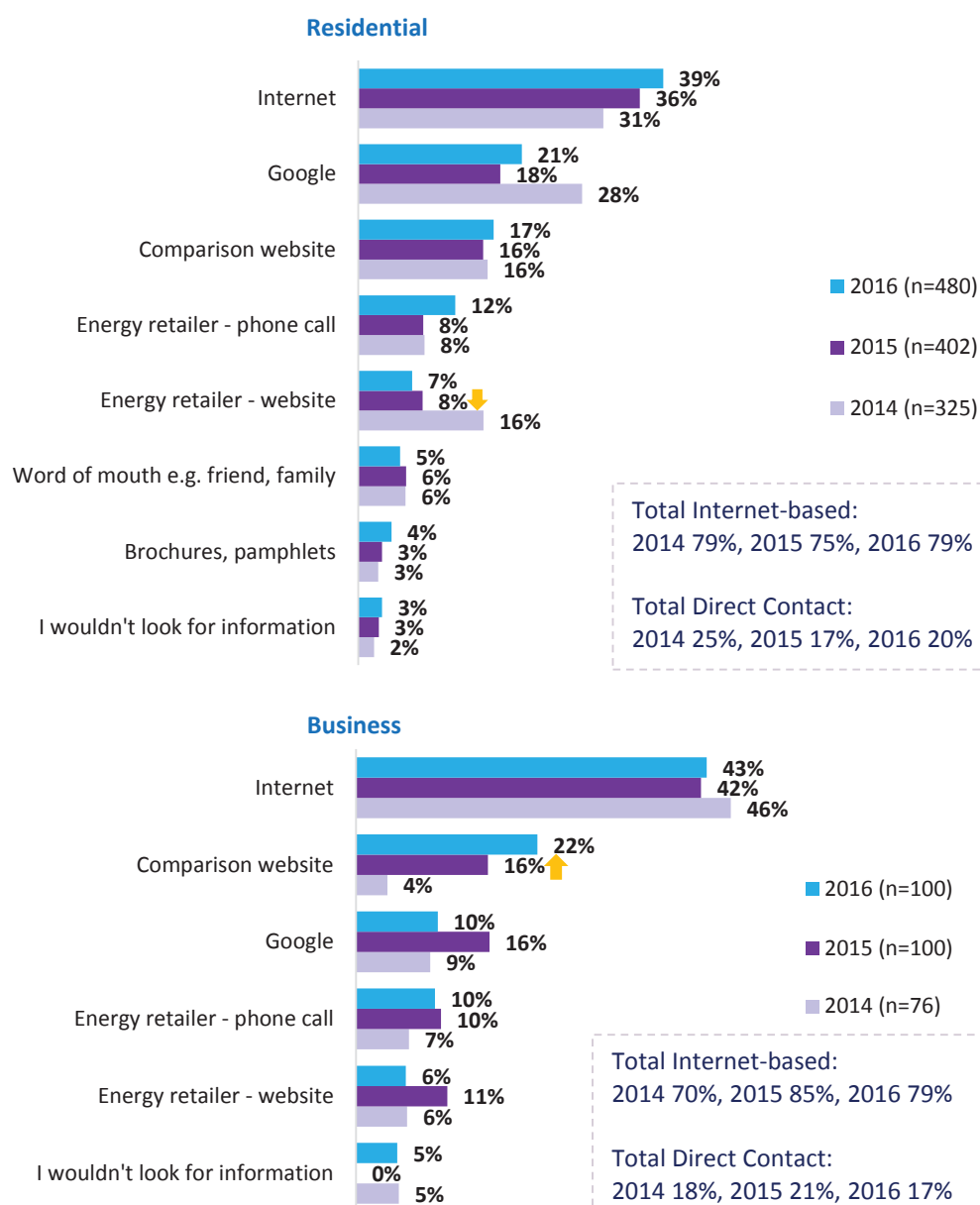
The most useful information source among residential consumers who had switched their gas company or plan was also a Google or internet-based search, and this was significantly higher, at 37% up from 16% in 2015. Other sources were relatively stable, though it is worth noting that there was a slight decrease in gas switchers saying that comparison websites were the most useful (from 11% to 3%).



Among all NSW consumers surveyed, internet sources would still be the most preferred if they were looking for information about different energy offers

All survey participants were asked what information source they would most prefer to use in the future to find out about different energy companies and offers. Year-on-year most have indicated they would prefer to use internet-based sources: nett 79% of both residential and small business consumers. Unprompted mentions of comparator websites continue to trend upwards as the most preferred information source among *businesses* since the benchmark (from 4% in 2014 to 22%).

Preferred Information Source for Information about Different Retailers or Plans (New South Wales) - Unprompted, Top Mentions 3%+



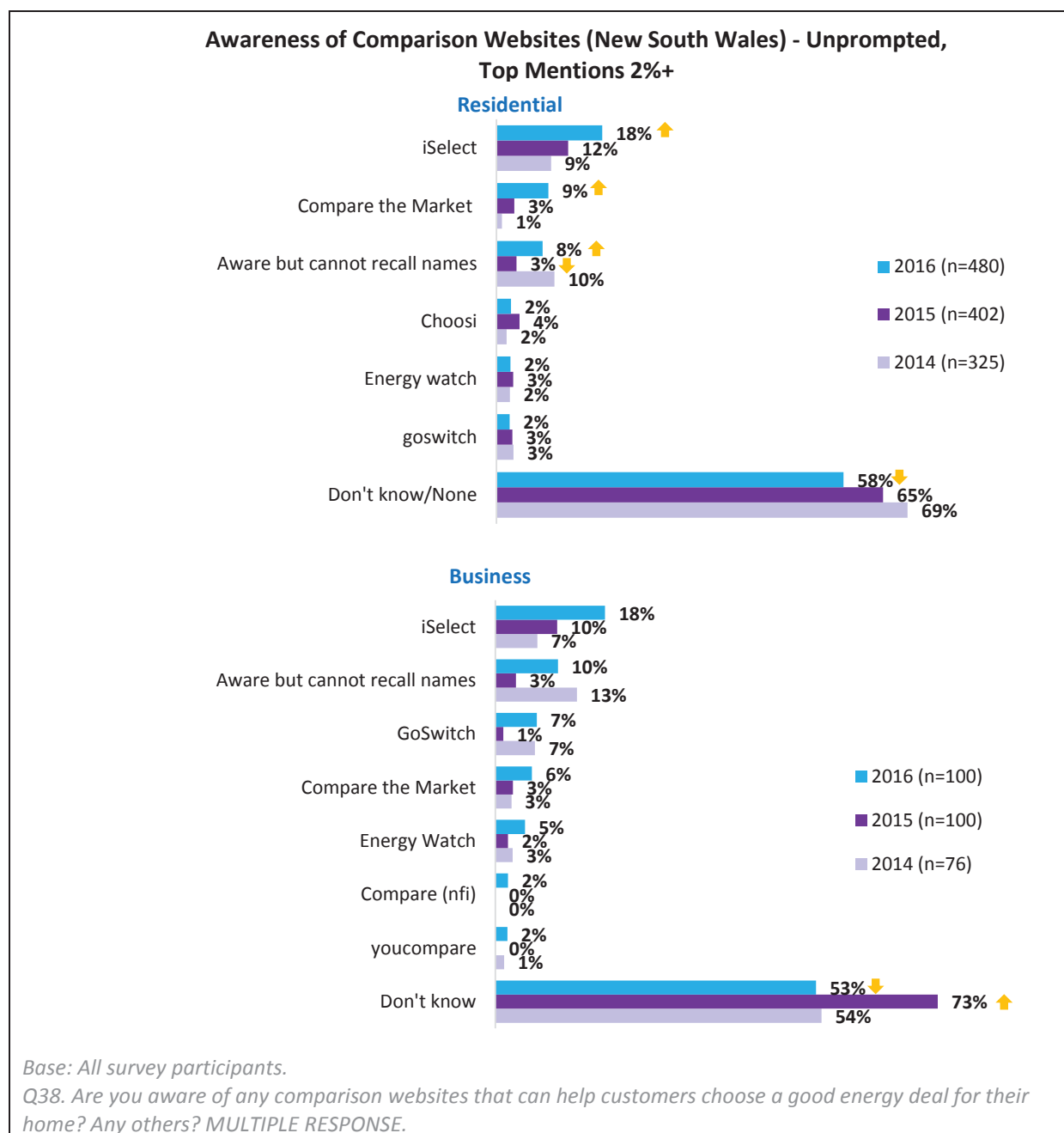
Base: All survey participants.

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?

Unprompted recall of comparison websites is growing, especially iSelect and Compare the Market

Unprompted awareness of comparison websites among all residential consumers increased significantly, with around four in ten (nett 42%) indicating that they are aware of a comparator website (up from 35% in 2015, and 31% in 2014). There has been a corresponding steady decline year-on-year of residential consumers reporting they don't know of any comparator websites at all (69% in 2014, 65% in 2015 down to 58% in 2016).

Specifically, top of mind recall of iSelect increased significantly – this remains the most commonly mentioned comparison site among residential consumers in NSW (from 9% in 2014 to 18% in this review). This was followed by Compare the Market (at 9%, significantly higher than just 1% in 2014).



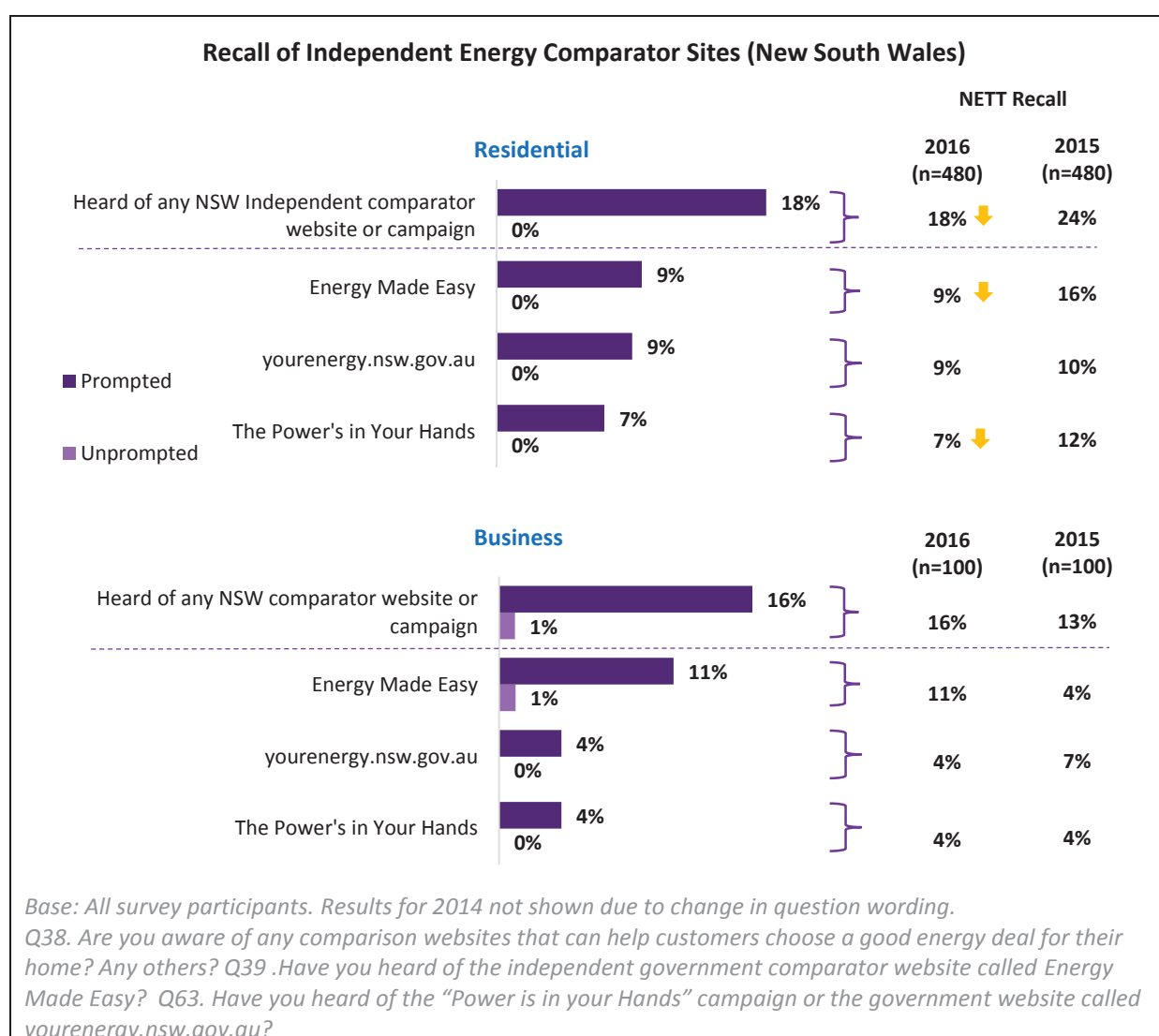
Among *business* consumers, unprompted awareness of comparison websites also improved significantly on 2015, with around half unable to name any comparison sites: 53% in 2016, a significant drop from 73% in 2015 and returning to 2014 levels at 54%. A further 10% said they were aware of such sites but unable to recall any specific names.

As with residents, iSelect enjoyed increased awareness among small business consumers and remains the most commonly mentioned comparison site (18% in 2016 vs. 7% in 2014). Smaller proportions of consumers recalled GoSwitch (7%), Compare the Market (6%) and Energy Watch (5%).

Only around one in ten consumers had heard of the Energy Made Easy website

Even when prompted for recall of the government comparator sites and campaigns, awareness remained low. Among residential consumers there was a similar level of prompted awareness for Energy Made Easy (9%), yourenergy.nsw.gov.au (9%) and The Power's in Your Hands (7). Overall, there was a decrease in awareness of NSW government comparison websites since 2015 (from nett 24% to 18%).

For small business consumers, there was slightly higher prompted awareness of the Energy Made Easy website from 2015 (4% up to 11% in 2016). Overall there has been no significant changes in recall of NSW government websites among business consumers (13% in 2015 up slightly to 16% in 2016).



Switching rates have continued to decline since 2014 among residential consumers, and remain essentially unchanged among business consumers

The incidence of switching energy company and/or plan in the *last five years* has declined significantly among residential consumers compared with the 2014 benchmark (from nett 61% to 49% in 2016).

More specifically, among residential consumers, switching electricity company or plan has fallen from 60% in 2014 to 48% in 2016; switching gas company or plan has fallen from 48% in 2014 to 33% in 2016. The incidence of switching energy company or plan among business consumers has declined (from 57% in 2014, 55% in 2015 to 53% in 2016), but this is not a significant fall.

However, switching rates in *the past 12 months* were essentially unchanged among residential consumers, at just over one quarter (nett 27% vs. 24% in 2015). The exception to this was for gas companies where just 10% reported switching in the last 12 months, down from 19% in 2015. Among business consumers switching rates declined marginally, from 27% in 2015 down to 22%.

Those who had actively investigated offers and options were again more likely to have switched both in the last five years (71% vs. 40% among those who had not actively looked into their options) and in the last 12 months (54% vs. 15% respectively).

Total rates of switching electricity or gas company or plan in NSW *over the last five years* are generally in line with the NEM overall. Among all survey participants, energy switching rates in NSW remain higher than for other services such as insurance, telecommunications and banking, as tabled below.

Switching Rates for Various Service Providers - Last Five Years

Incidence of Switching (% switched at least once in <i>last five years</i>)	NEW SOUTH WALES Residential			NEW SOUTH WALES Business		
	2014 (n=325)	2015 (n=402)	2016 (n=480)	2014 (n=76)	2015 (n=100)	2016 (n=100)
Electricity Company	49%	40%	36% ↓	45%	43%	38%
Electricity Plan	40%	34%	26% ↓	37%	35%	27%
TOTAL Electricity	60%	52%	48% ↓	55%	54%	52%
Gas Company	37%	36%	25% ↓	44%	39%	17%
Gas Plan	33%	27% ↓	18%	39%	25% ↓	4%
TOTAL Gas	48%	40% ↓	33%	44%	43%	17%
TOTAL Electricity or Gas	61%	53% ↓	49%	57%	55%	53%
Car Insurance	38%	36%	32%	*Business consumers not asked these questions.		
Mobile	32%	31%	33%			
Internet	30%	29%	30%			
Home Insurance	20%	26%	21%			
Home Phone	22%	21%	20%			
Banking	18%	20%	18%			
Health Insurance	12%	17%	14%			

Base: All survey participants.

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?

The results for this question of the switching rates in the last 12 months are charted over the page.

Switching Rates for Electricity and Gas - Last 12 Months

Incidence of Switching (% switched at least once in last 12 months)	NEW SOUTH WALES Residential		NEW SOUTH WALES Business	
	2015 (n=402)	2016 (n=480)	2015 (n=100)	2016 (n=100)
Electricity Company	14%	15%	17%	15%
Electricity Plan	18%	15%	20%	10%
TOTAL Electricity	23%	25%	26%	21%
Gas Company	19%	10% ↓	Not shown due to small sample sizes.	
Gas Plan	17%	13%		
TOTAL Gas	23%	17%		
TOTAL Electricity or Gas	24%	27%		

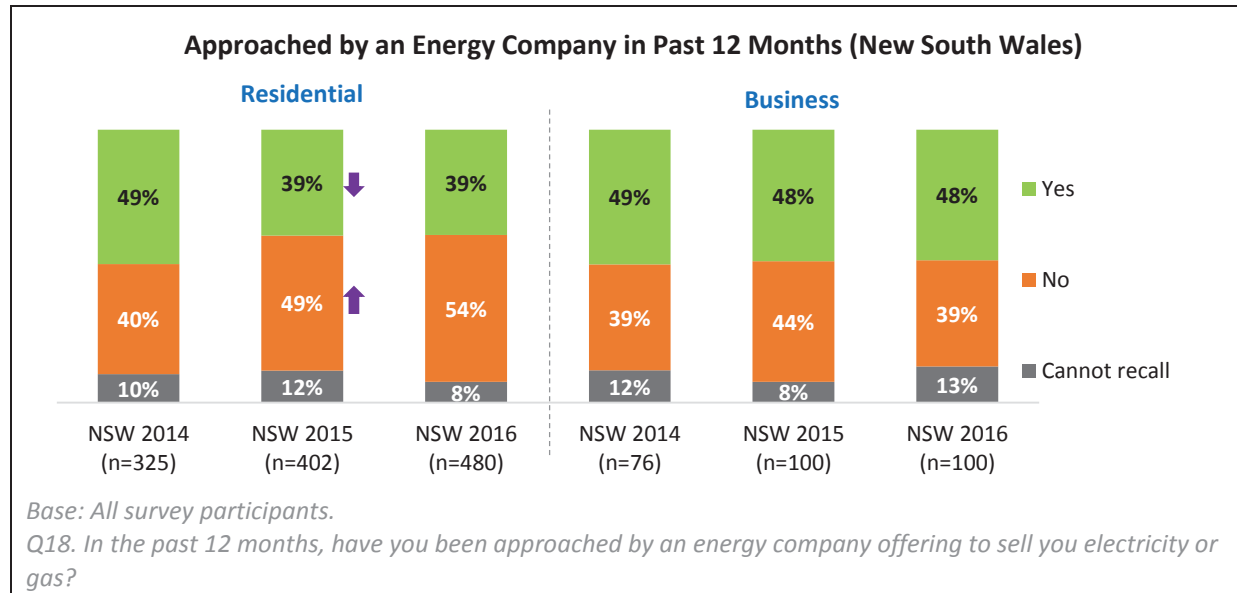
Base: All survey participants. NB: Question not asked in 2014. NB: Small business consumer results for gas not shown due to small sample sizes: 2016 (n=23), 2015 (n=21).

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?

Direct residential approaches from energy companies also remained stable after the 2015 decline

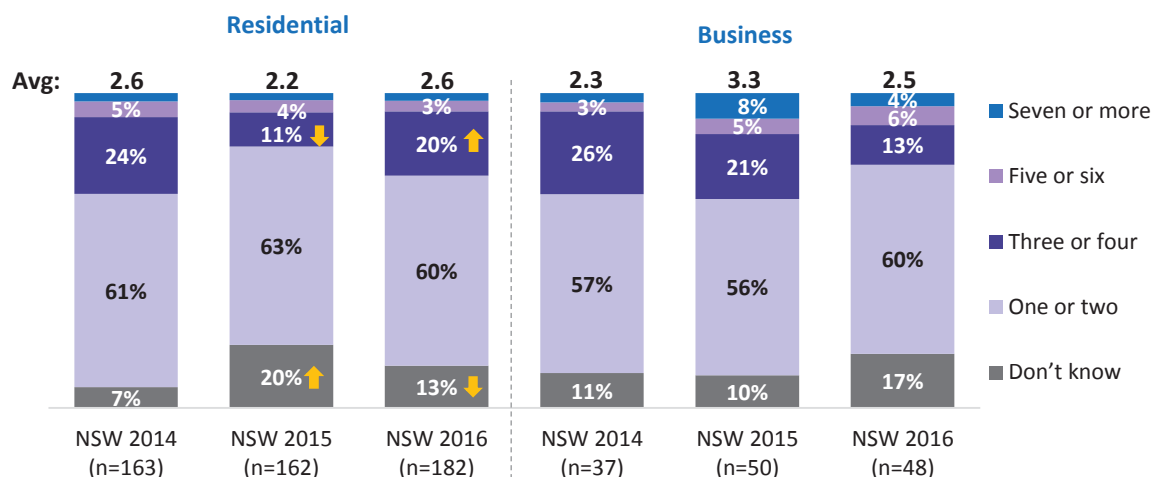
As with switching rates, direct approaches by energy companies offering to sell consumers electricity or gas in the past 12 months were stable against 2015. Around two fifths (39%) of the residential consumers surveyed reported being approached by an energy company in the past 12 months, which remains significantly lower than in the 2014 benchmark (49%).

The proportion of small business consumers who reported being approached by an energy company in 2016 (48%) has remained steady year-on-year.



As shown on the next page, there was a slight increase in the number of companies *residential* consumers reported being approached by in the past 12 months, with the average returning to that of the 2014 benchmark: from 2.2 companies in 2015, up to 2.6. There was a jump in the proportion who specifically reported being contacted by three or four companies (up to 20% from 11% in 2015). *Business* consumers reported fewer different company approaches than in 2015 (down to 2.5 on average from 3.3), with levels among these consumers also close to the 2014 benchmark (2.3).

Number of Different Companies Approached By (New South Wales)



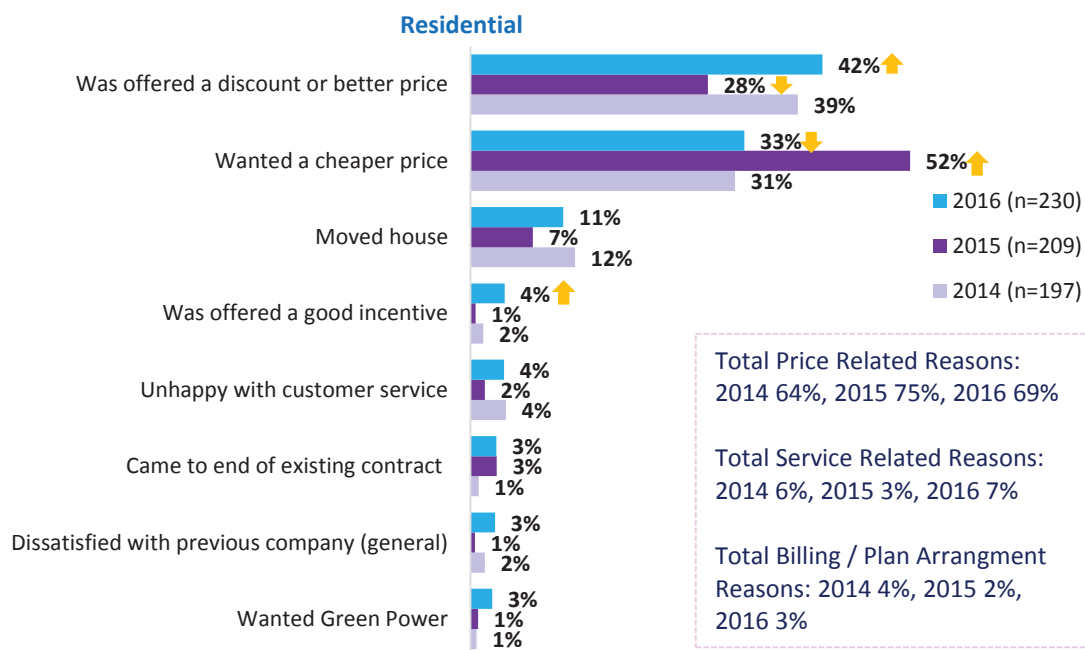
Base: Participants who had been approached by an energy company in the past 12 months.

Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?

Price related factors remain the main reason for switching, with a rise in proactive offers

Price related factors – i.e. being offered a discount or wanting a cheaper price – remained the main reason for switching electricity company or plan in 2016. Over two-thirds (69%) of residential consumers and 63% of business consumers mentioned such factors unprompted. Notably, there was an increase in both residential and business consumers specifically reporting that they were *offered* a discount or better price, which had declined among residential consumers in 2015.

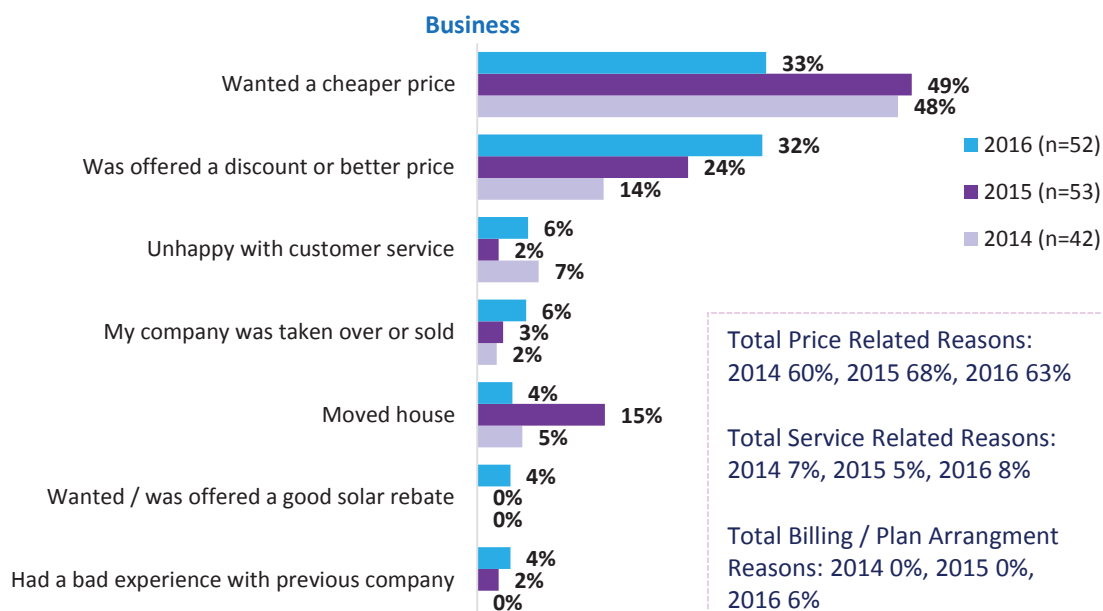
Main Reason for Switching Electricity Company or Plan (New South Wales) - Unprompted - Top Mentions 3%+



Base: Participants 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.

Main Reason for Switching Electricity Company or Plan (New South Wales) - Unprompted - Top Mentions 3%+

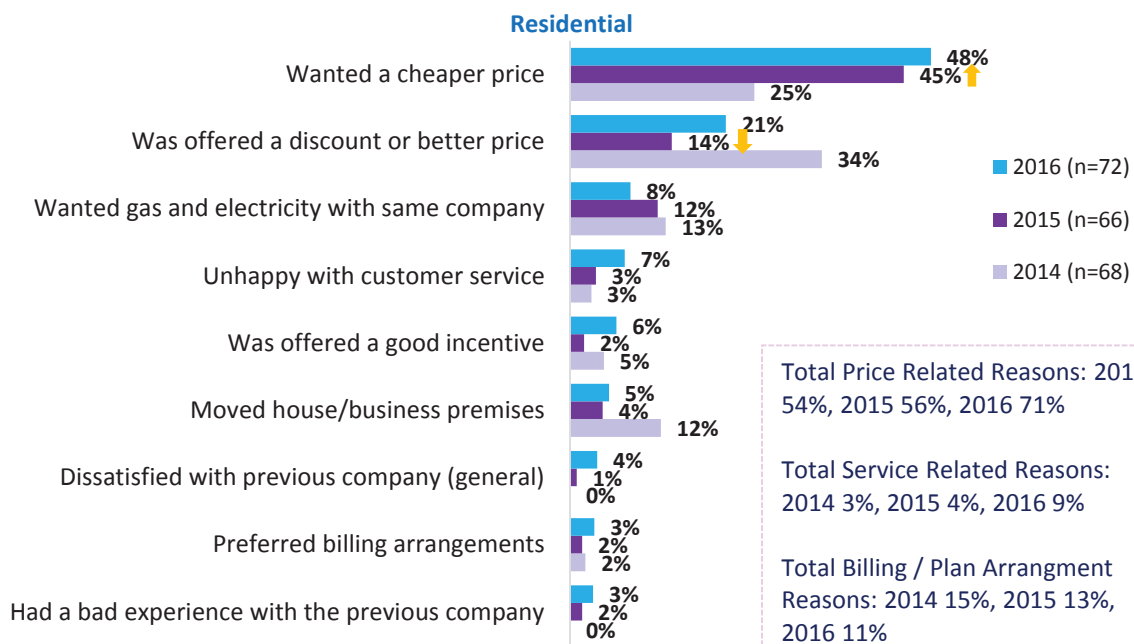


Base: Participants who switched their electricity company or plan.

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

In terms of switching gas company or plan in 2016, price related factors were also the main driver among residential consumers (nett 71%, which is significantly higher than in the two previous reviews).

Main Reason for Switching Gas Company or Plan (New South Wales) - Unprompted, Top Mentions 3%+



Base: Participants who switched their gas company or plan.

NB: Business results not shown due to small sample size: 2016 (n=22).

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.

When prompted with a range of considerations, the discounts offered and the price per kWh were rated the most important factors in the decision to switch electricity company or plan

To better understand the relative importance of switching drivers, survey participants were prompted with a range of factors that could be considered when deciding whether or not to switch. Charted over the page, the most important ones for both residential and small business consumers were: the discounts offered (80% of residential consumers gave this an importance rating of 8 or more out of 10, and 85% of business consumers), the price per kWh (73% and 84% respectively), and the estimated total bill amount (71% and 81% respectively).

For residential consumers the results were stable against 2015. There were some shifts among business consumers, but only significantly for whether the price per kWh can change during the contract, which became more important in 2016 (from 55% nett 8+ in 2015, to 77%).

Of least importance to all consumers were some of the new items asked in 2016: the ability to access storage batteries (16% nett 8+ among residential consumers, 10% among businesses), the ability to access solar panels (22% and 10% respectively), and having access to live use/cost data (25%, 21%).

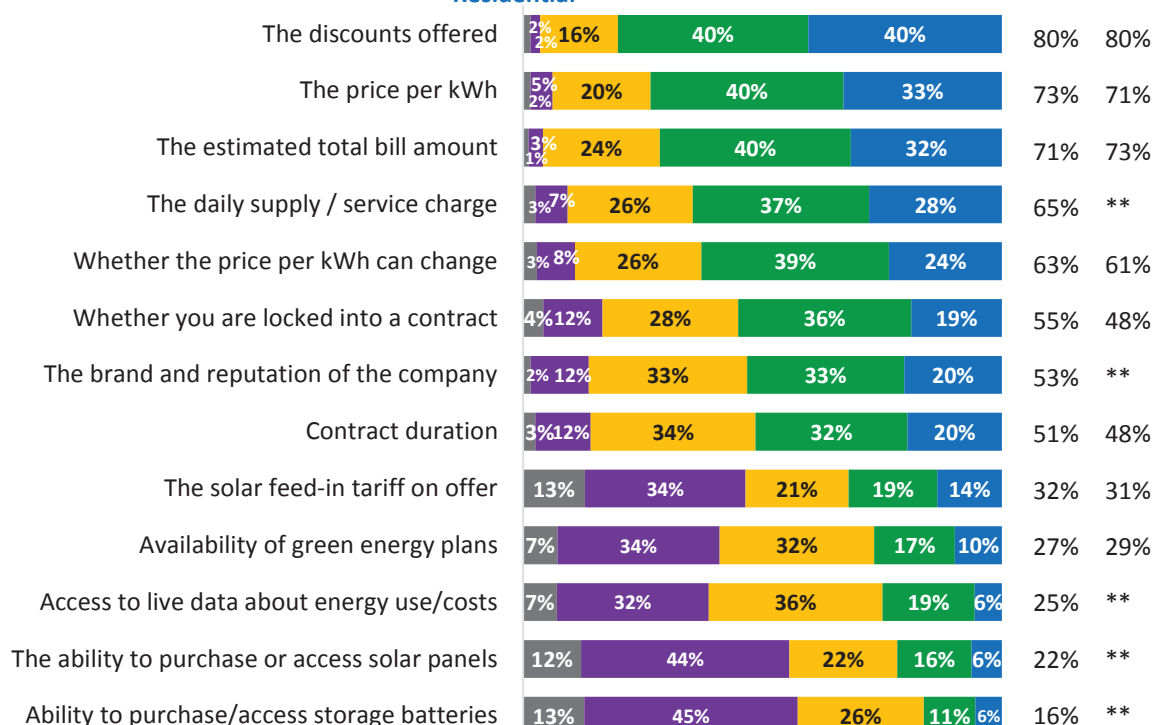
In contrast, for residential consumers with solar panels, the solar feed-in tariff was the third highest priority (77% nett 8+). Those with solar panels also rated the importance of the ability to purchase or access solar panels significantly higher than those without solar panels (35% vs. 18%).

Importance of Factors in Making the Decision to Switch Electricity Company or Plan (New South Wales)

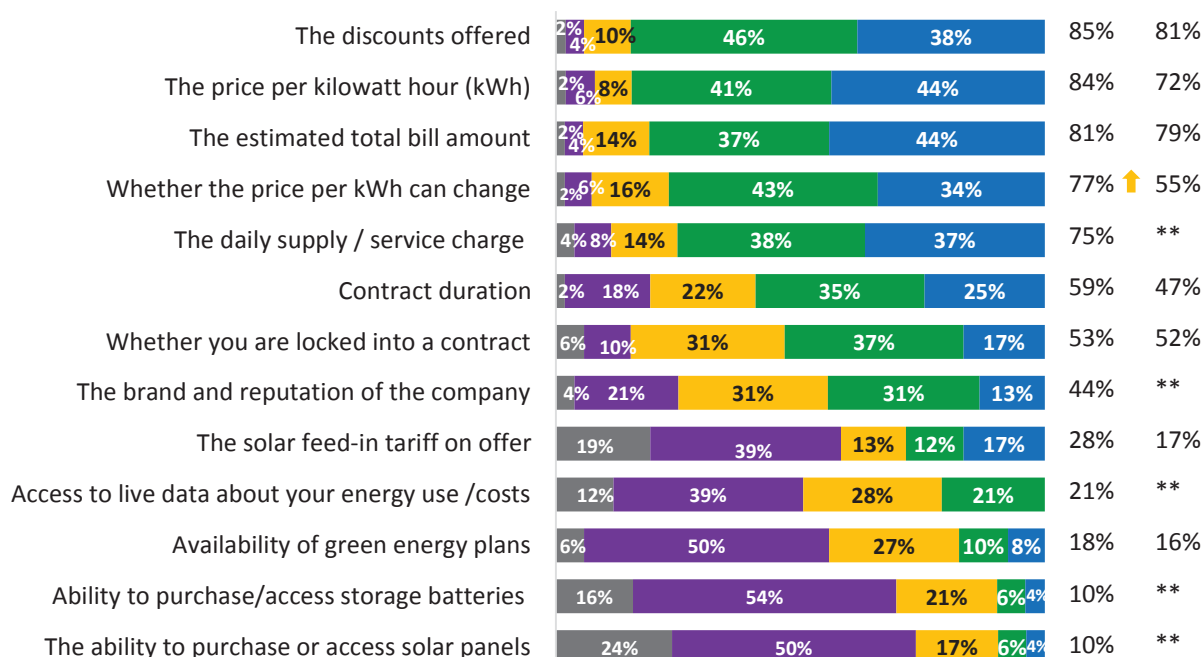
NETT 8+

2016 2015

Residential



Business



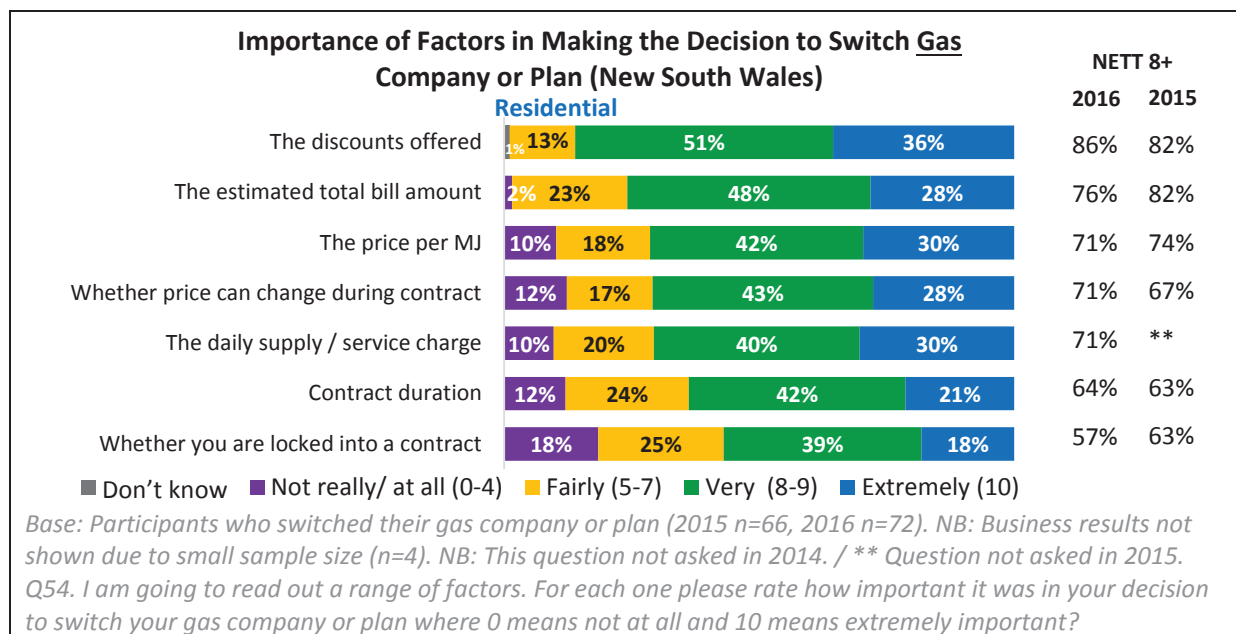
■ Don't know ■ Not really/ at all (0-4) ■ Fairly (5-7) ■ Very (8-9) ■ Extremely (10)

Base: Participants who switched their electricity company or plan Base: Participants who switched their electricity company or plan Residential: (2015 n=209, 2016 n=230). Business: (2015 n=53, 2016 n=52).

NB: This question not asked in 2014. ** Question not asked in 2015.

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?

As shown below, importance of factors in deciding to switch gas company or plan among residential consumers was similar to that for electricity, and broadly consistent with 2015. The most important factors were the discounts offered (86% gave this an importance rating of 8 or more out of 10 vs. 82% in 2015), the estimated total bill amount (76% vs. 82%) and the price per megajoule (71% vs. 74%). Relatively less important factors were whether consumers were locked into a contract and the duration of the contract (57% and 64% respectively rated these 8 or higher).



Consumers with higher energy bills still want to see bigger savings before considering switching

In order to seriously consider switching their electricity company or plan, on average residents indicated they would need to save \$202 per year on their bill, which is slightly higher than the 2015 result of \$194. For their gas bill, the amount was \$171 on average, up \$20 on the 2015 average (\$151). Neither of these increases were statistically significant.

By comparison and reflecting their higher average energy bills, small business consumers felt they would need to save about \$477 on their electricity bill in order to consider switching, which is lower than in 2015 (\$695) but not significantly so.

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size – See definitions below)	NEW SOUTH WALES Residential		NEW SOUTH WALES Business	
	2015 (n=402)	2016 (n=480)	2015 (n=100)	2016 (n=100)
Total	\$194	\$202	\$695	\$477
Last Quarterly Electricity Bill: Low	\$162	\$169	\$216	\$257
Last Quarterly Electricity Bill: Medium	\$195	\$213	\$442	\$477
Last Quarterly Electricity Bill: High	\$228	\$247	\$1,264	\$1,066

Base: All survey participants. NB: Question not asked in 2014.

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? Residential: "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above. Business: "Low" is <\$500, "Medium" is \$500 to <\$1,000, "High" is \$1,000 and above.

Amount Needed to Save Annually on <u>Gas</u> Bill to Seriously Consider Changing (Average by Bill Size)	NEW SOUTH WALES Residential	
	2015 (n=163)	2016 (n=213)
Total	\$151	\$171
Last Quarterly Gas Bill: Low	\$127	\$148
Last Quarterly Gas Bill: Medium	\$170	\$179
Last Quarterly Gas Bill: High	\$157	\$195

Base: Participants with mains connected gas. NB: Business results not shown due to small sample size (n=23). Question not asked in 2014.

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? "Low" is <\$200, "Medium" is \$200 to <\$299, "High" is \$300 and above.

Analysis of the savings needed among customers with different current bill amounts shows that those with larger bills continue to require larger savings in order to seriously consider switching. This became slightly more pronounced among residential consumers with relatively high current bills – rising from \$228 in 2015 to \$247 in 2016 for electricity and from \$157 to \$195 for gas. There was also a notable increase in the amount residential *gas* consumers with high bills felt they would need to save (from \$157 a year in 2015 to \$195 this year).

Around half of consumers were either currently seeking or interested in seeking a better deal

When asked about their current behaviours in relation to switching, around half of residential consumers (nett 48%) were *currently looking or interested in looking for a better deal but not currently looking*, which is similar to 2015 (51%).

Slightly fewer business consumers were *currently looking or interested in looking for a better deal* (43%, down from 55% in 2015).

Around three in ten residential consumers were not interested in switching company or plan (29%, which is similar to 2015 at 33%), while a somewhat larger proportion of business consumers were not interested; 37%, up slightly from 28% in 2015.

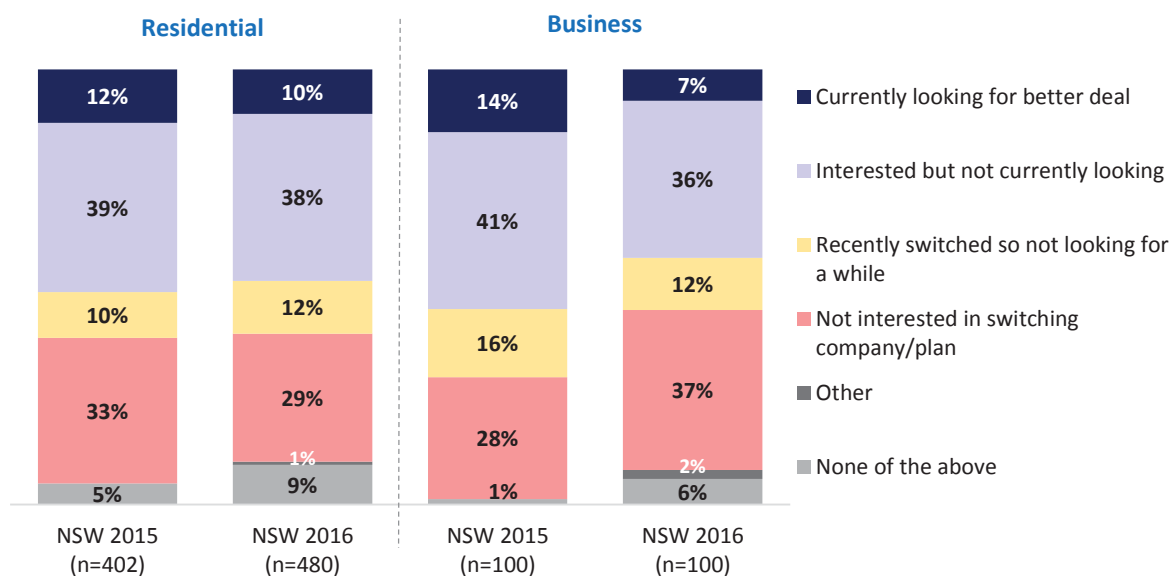
The following types of residential consumers were significantly more likely to say they were currently looking for or at least interested in seeking out a better deal:

- Had a relatively high quarterly electricity bill (62% of those with bills \$500 or higher vs. 46% with bills lower than \$500); and
- Had actively investigated offers and options in the last 12 months (62% vs. 43% of those who had not investigated at all).

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

- Have not actively investigated offers and options in the last 12 months (35% vs. 19% of those who had investigated).

Interest in Looking for a Better Deal (New South Wales)



Base: All survey participants.

Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household? NB: Results for 2014 are not shown due to change in question structure.

3.2.2 Consumer Outcomes

Introduction

This section of the report details the findings on NSW consumers’:

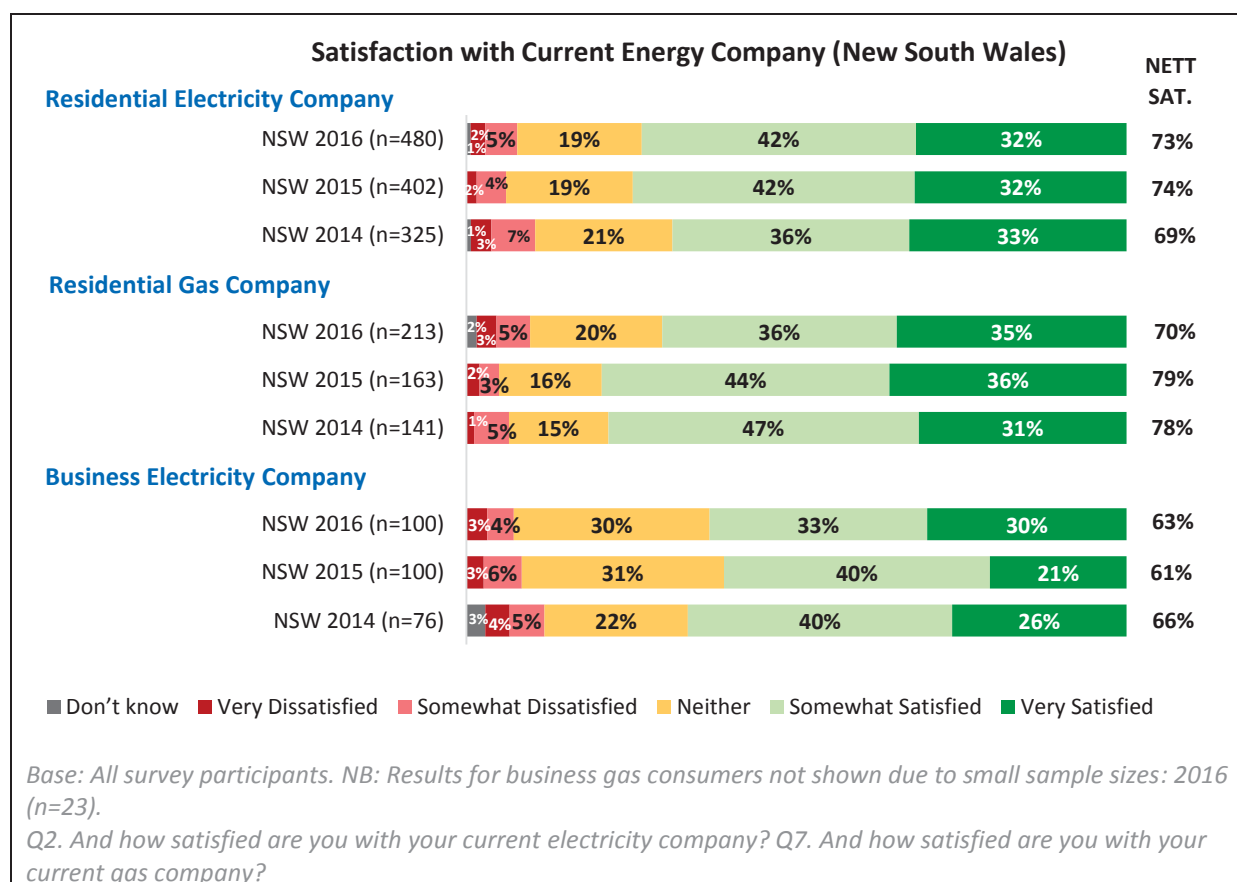
- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market;
- Satisfaction with the switching process among those who had done so;
- Consumer confidence that they can find the right information and make the right choice in the market; and
- Attitudes to switching.

The Results

Satisfaction with electricity companies is stable, while satisfaction with gas companies was lower

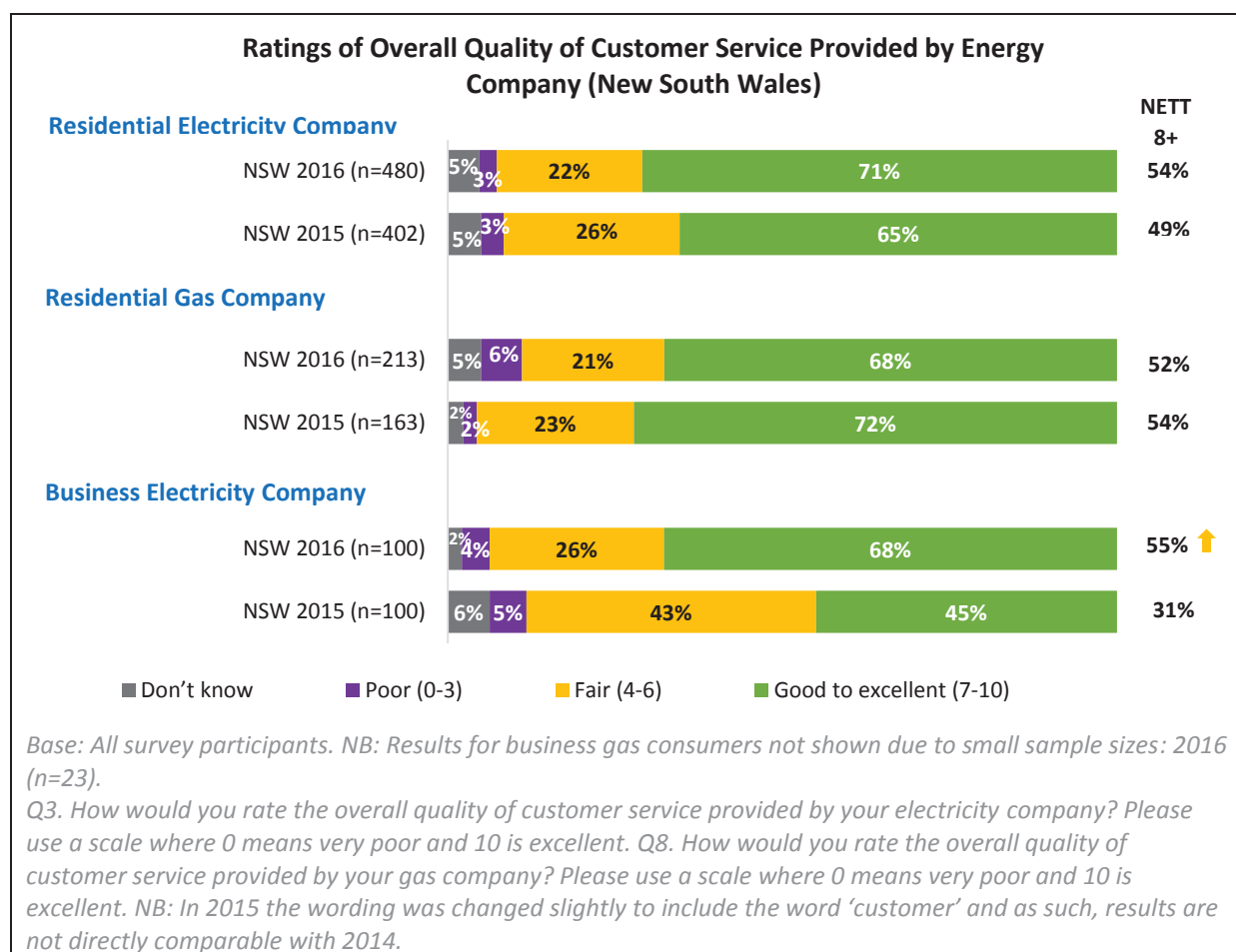
The proportion of residential consumers who are satisfied with their electricity company was similar this year (nett 73% somewhat / very satisfied vs 74% in 2015), and remains higher than in 2014 (69%). There was a drop in nett satisfaction with their gas company, falling from 78% in 2014 and 79% in 2015, to 70% in 2016 (though this was not a statistically significant decline).

Small business consumers in NSW remain less satisfied with their electricity company than residential consumers, with similar nett satisfaction levels year-on-year (66% in 2014, through to 63% in 2016). Although based on very small sample sizes satisfaction with their gas companies fell somewhat from previous years (though not significantly) from 77% in 2014 and 76% in 2015, to 57% in 2016.



When it came to the overall quality of customer service provided by their electricity company, in line with 2015 results around half of the residential consumers surveyed in NSW gave this a high rating of 8 or more on a scale of 0 to 10: 54% vs. 49% in 2015. As shown below, similar ratings were provided for the overall quality of service from their *gas* company (52% in 2016 vs. 54% in 2015).

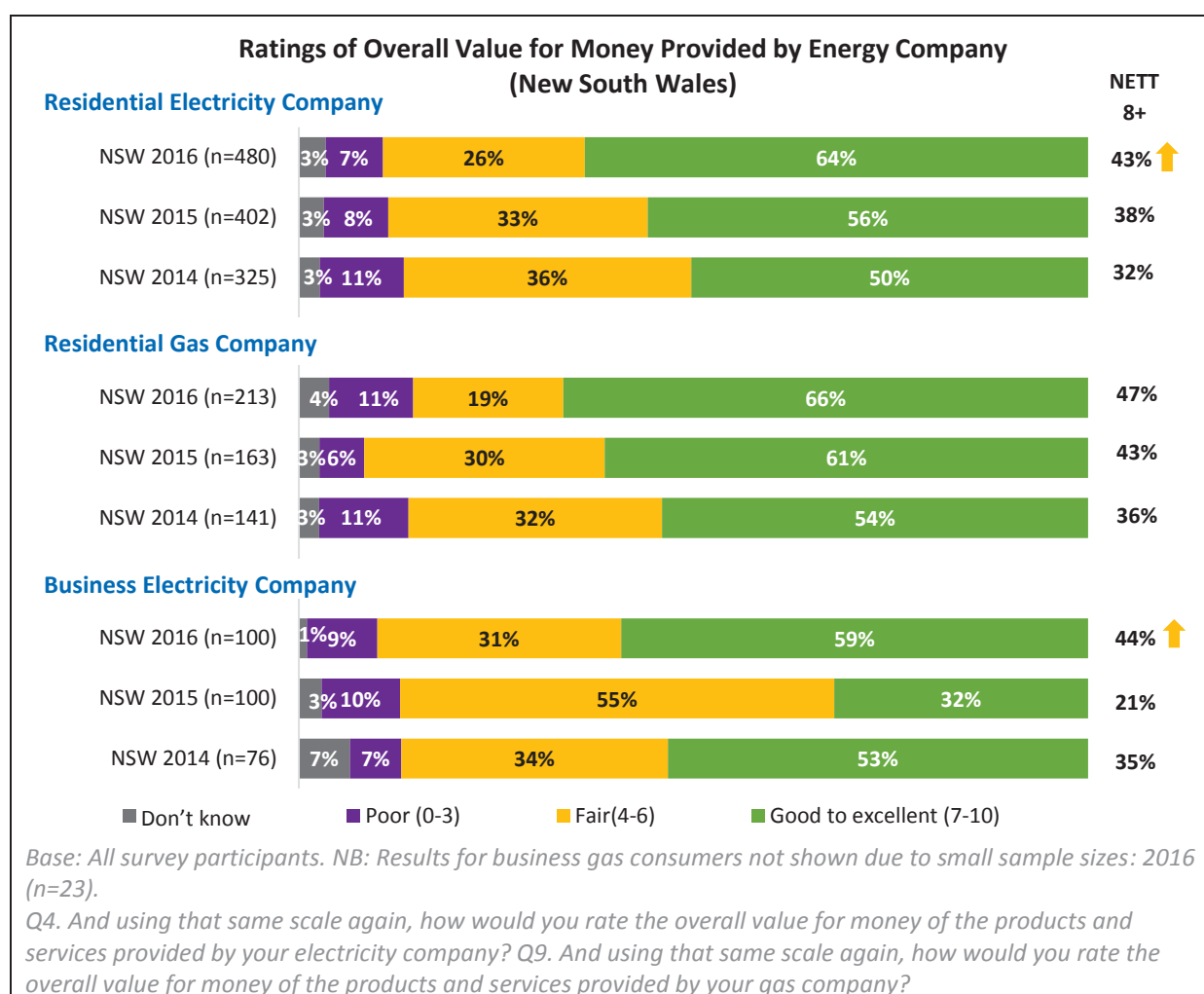
Among *small business* customers, service ratings for their electricity companies improved significantly from 31% nett 8+ in 2015 to 55% in this review. Their ratings for their *gas* companies decreased somewhat, though not significantly, from 44% in 2015 to 35% this year.



Value for money ratings are trending up

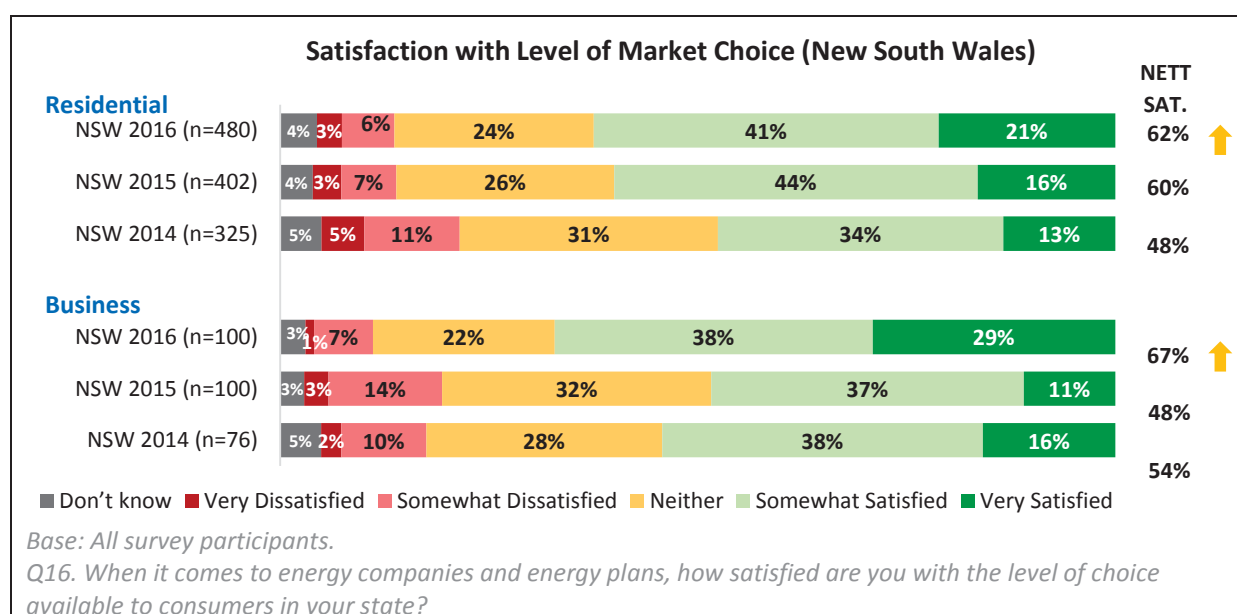
As shown in the chart over the page, among *residential* consumers, ratings of overall value for money with their electricity company have been improving over time: nett ratings of 8 or more out of 10 were up significantly from 32% in 2014 and 38% in 2015, to 43% in 2016. The same trend is evident for gas companies, with an increase in high ratings of value for money from their gas company; from 36% in 2014 and 43% in 2015 up to 47% in 2016, though these shifts are not statistically significant.

Among *small business consumers* value for money ratings also improved significantly in 2016 and were at their highest across all years of the study, with 44% giving their electricity company a rating of 8 or more vs. 35% in 2014 and 28% in 2015. However, ratings for their gas companies have remained relatively low compared to the benchmark result, at 27% in 2016 compared to 53% in 2014 (not charted due to the small sample sizes).



Satisfaction with the level of choice in the energy market in NSW is at the highest levels yet

Participants were asked to indicate their satisfaction with the level of market choice in NSW. The results among residential consumers have improved year-on-year, with 62% somewhat or very satisfied in 2016, significantly higher than the benchmark of 48% in 2014 and up marginally from 60% in 2015. Among businesses there was a significant improvement this year; 67% vs. 48% in 2015.

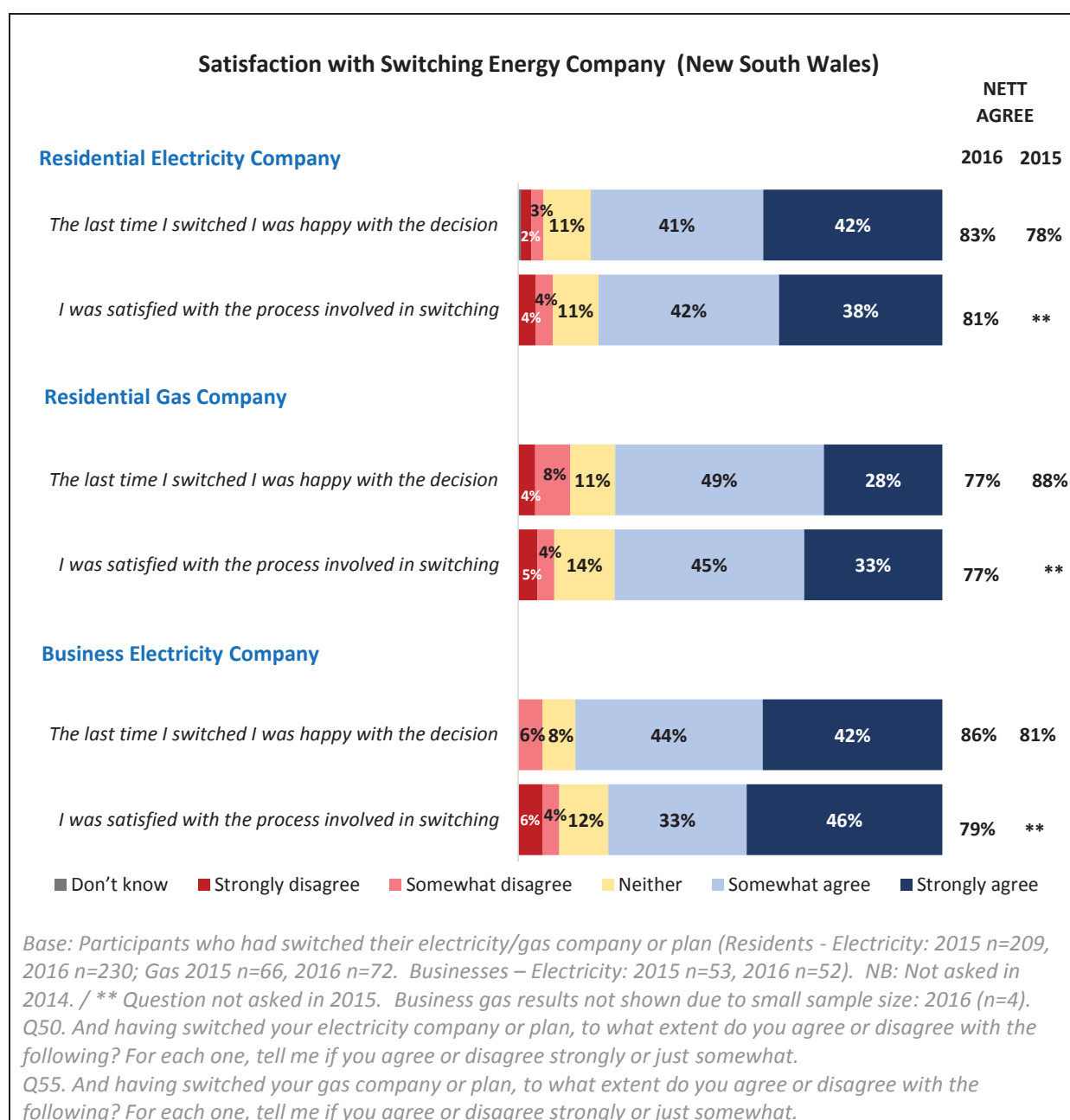


Most consumers who had switched their electricity company or plan were again happy with their decision and most were satisfied with the process involved

The attitudes of consumers who had switched electricity company or plan were explored through measuring agreement / disagreement levels with several statements. Most survey participants again agreed that *the last time I switched I was happy with the decision*: nett 83% of residential consumers strongly / somewhat agreed in 2016 vs. 78% in 2015, and 86% of businesses vs. 81% in 2015.

Most also agreed with the new statement, *I was satisfied with the process involved in switching* (81% of residents and 79% of small business consumers).

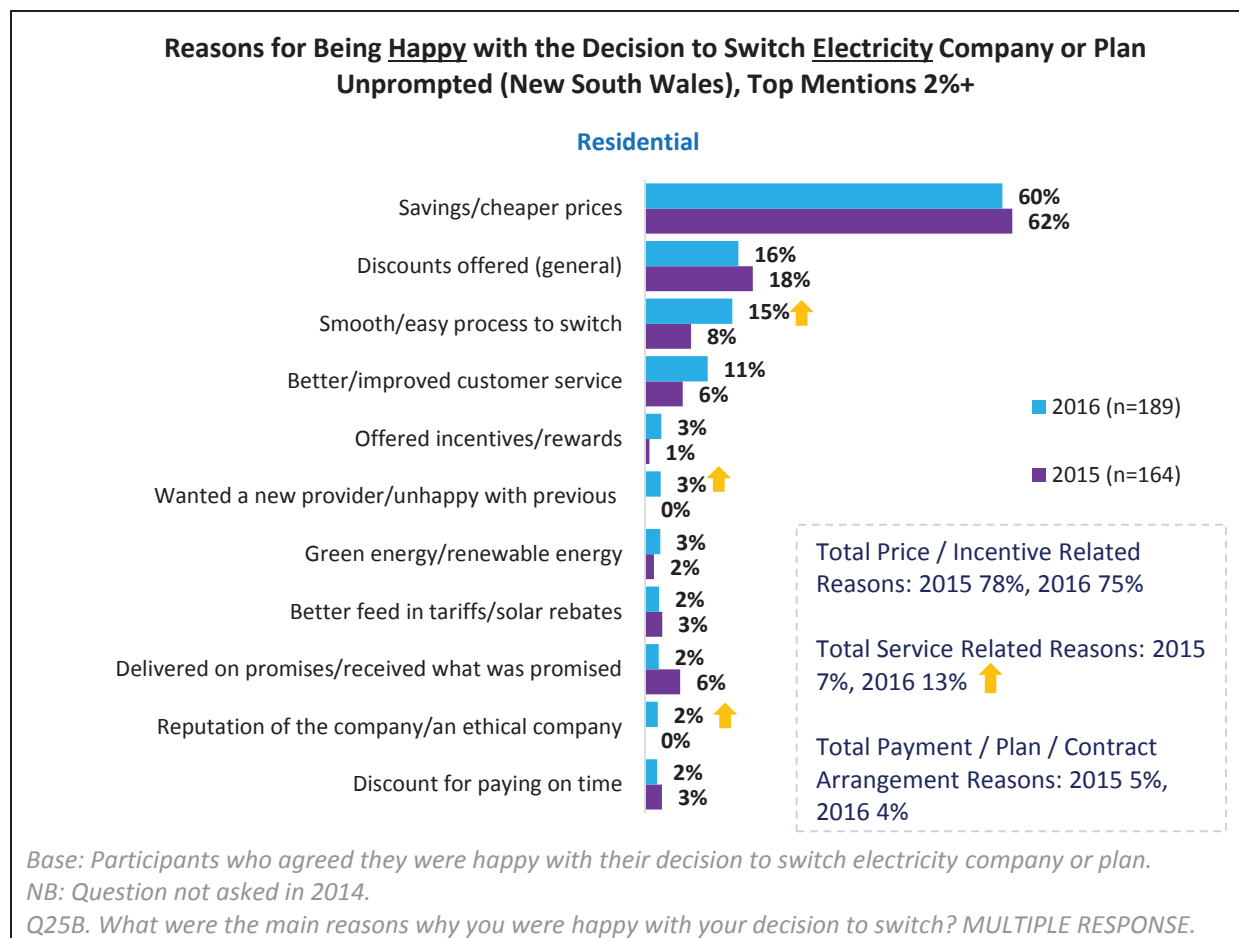
In line with 2015 results, most residential consumers who had switched their gas company or plan also agreed that *the last time I switched I was happy with the decision* (77% in 2016 vs. 88% in 2015), and that *I was satisfied with the process involved in switching* (77%).



As shown below and similar to results in 2015, residential consumers who were happy with their decision to switch electricity company were most likely to feel that way as a result of the savings and cheaper prices they received (60% - unprompted), and at much lower levels because of discounts offered (16%), and the process being smooth / easy (15%, which was up from 8% in 2015).

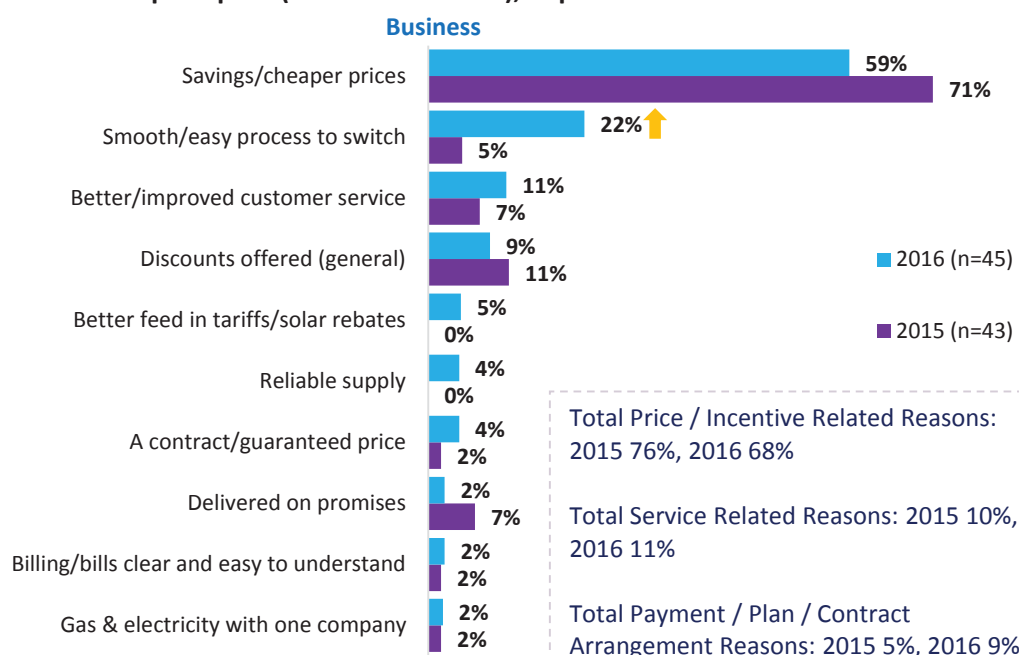
Business consumers who were happy with their decision to switch electricity company cited similar reasons to residential consumers and those they stated in 2015, including savings and cheaper prices (59%), the process being smooth and easy (22%, up significantly from 5% in 2015), better customer service (11%) and the discounts offered (6%).

These results suggest NSW retailers may have taken efforts to make the switching process easier for consumers.



The results for this question among business consumers surveyed are charted over the page.

Reasons for Being Happy with the Decision to Switch Electricity Company or Plan Unprompted (New South Wales), Top Mentions 2%+



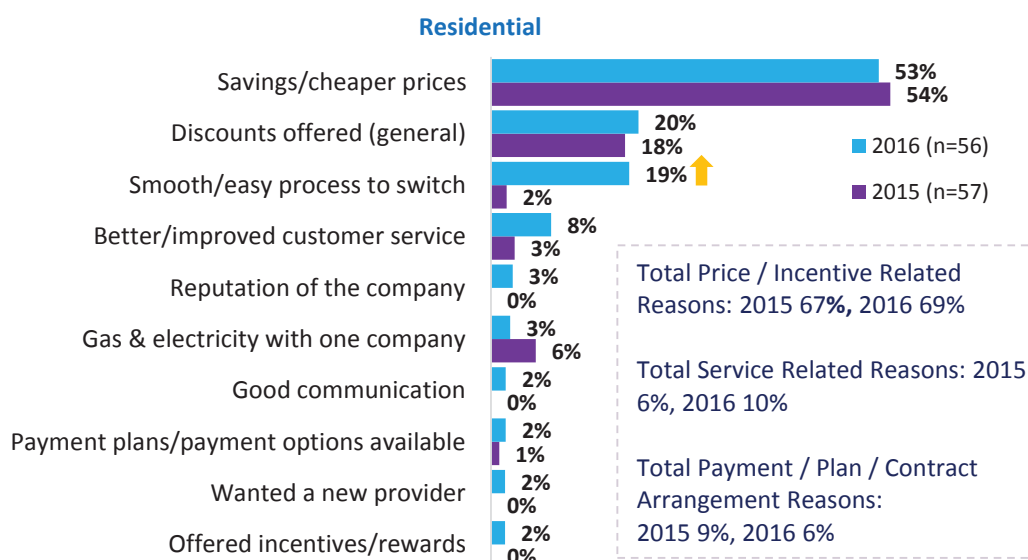
Base: Participants who agreed they were happy with their decision to switch electricity company or plan.

NB: Question not asked in 2014.

Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE.

Residential consumers who were happy with their decision to switch gas company/plan mentioned similar reasons as for electricity, including savings and cheaper prices (53%), the discounts offered (20%) and because the process was smooth / easy (19%, also up significantly from 2% in 2015).

Reasons for Being Happy with the Decision to Switch Gas Company or Plan Unprompted (New South Wales), Top Mentions 2%+



Base: Participants who agreed they were happy with their decision to switch gas company or plan. NB: Business results not shown due to small base size: 2016 (n=11). Question not asked in 2014.

Q30B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE.

Importantly, only thirteen residential consumers and seven business consumers were *not* happy with their decision to switch. The reasons for not being happy in 2016 were generally similar to those given in 2015. The main reason was that there were no real savings or that the savings were not as expected. Relatedly, a few also noted cancellation fees as a reason for not being happy. A small selection of verbatim responses are included below:

"The sales rep offered \$50 off gas and \$150 off electricity and neither was enforced." Residential Consumer

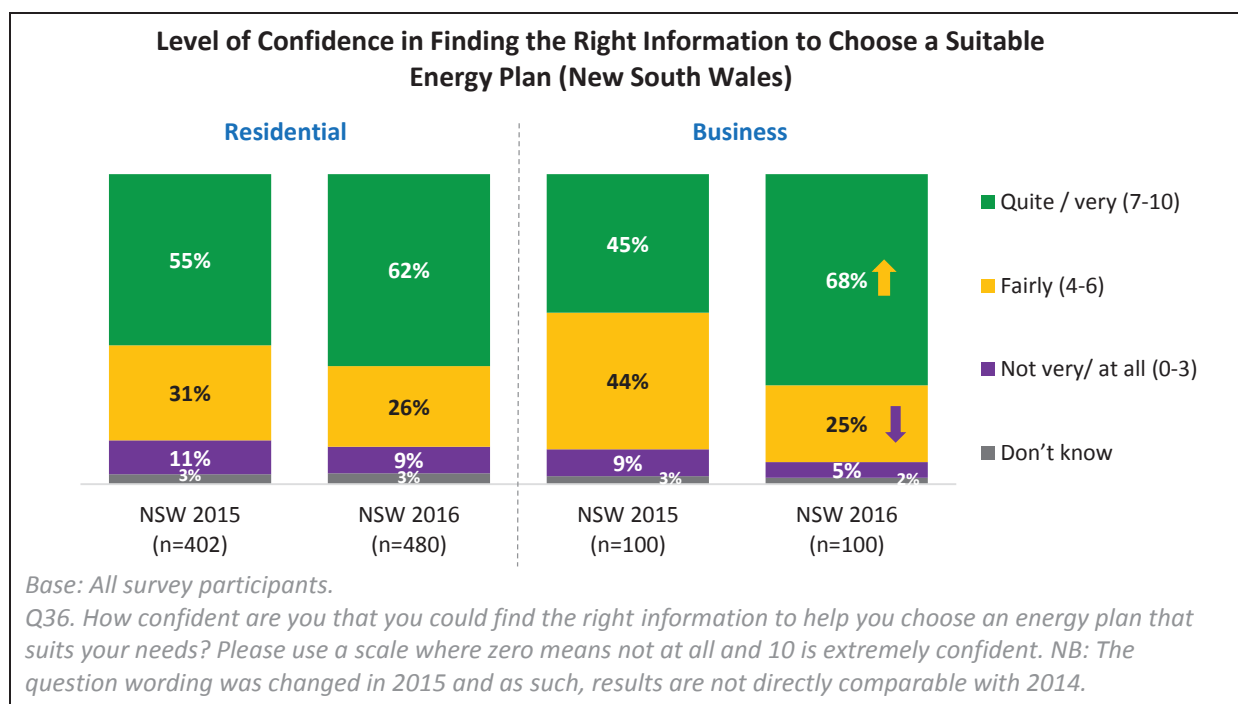
"Still on a contract and we had to pay a penalty to get out of the contract." Residential Consumer

"Overall it costs the same amount, no real savings because of fees for supply etc." Residential Consumer

"Contract length and the switching company fee, even at the end of the contract." Business Consumer

Increased consumer confidence in finding the right information to choose a suitable energy plan

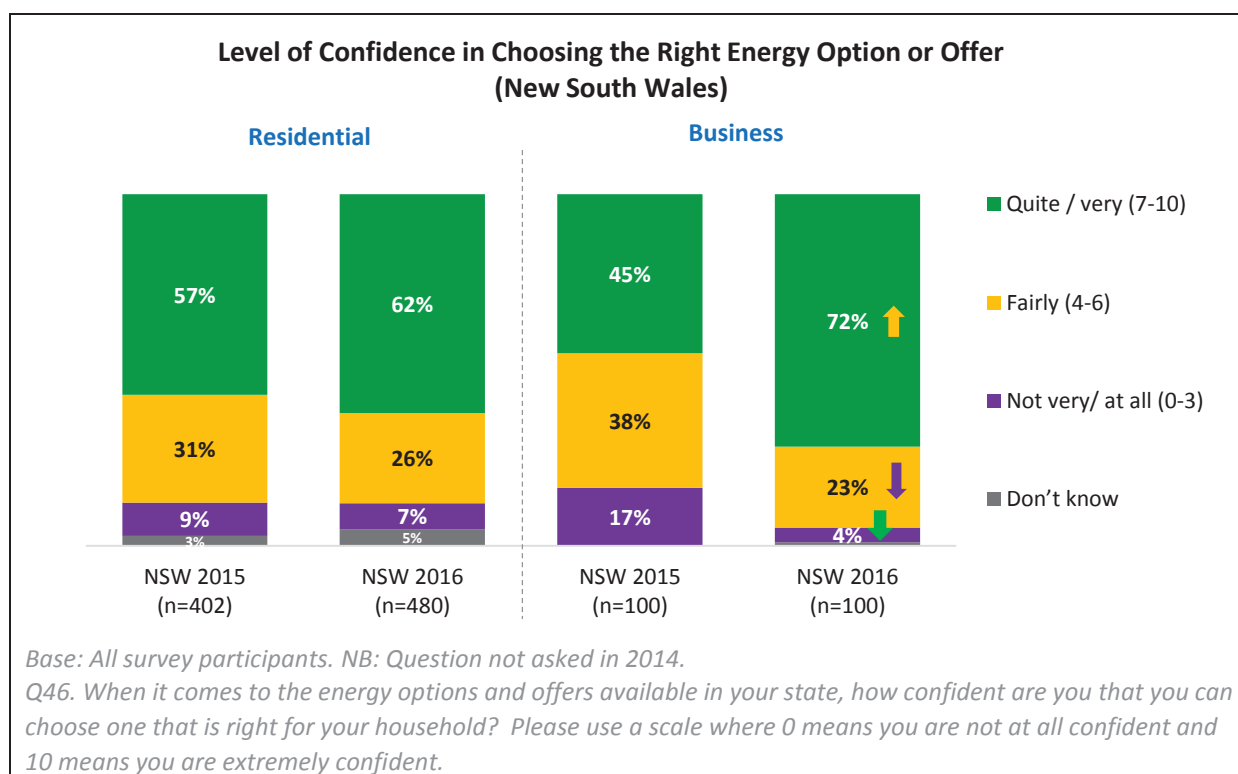
Confidence in finding the right information to choose a suitable energy plan increased slightly among residential consumers in 2016, with around three in five (62%) giving a high confidence rating of 7 or more out of 10, up from 55% in 2015. Significantly more business consumers were quite or very confident in finding the right information (68%, up from 45% in 2015).



The majority were also highly confident they could choose the right energy option or offer

Similar to finding the right information, just over three in five residential consumers were highly confident they could in turn choose the right energy option for their household; 62% rated their confidence as 7 or more out of 10 in 2016, up slightly from 57% in 2015. Significantly more business consumers were quite or very confident in choosing the right option (72%, up from 45% in 2015).

Those with solar panels were significantly more confident (72% rating a 7 or higher, compared with 59% among those without solar), perhaps reflecting their generally higher levels of engagement in energy matters as outlined in the NEM chapter.



The majority of consumers agreed they would switch if they were not happy with their current company and were concerned about hidden fees and charges if they did switch

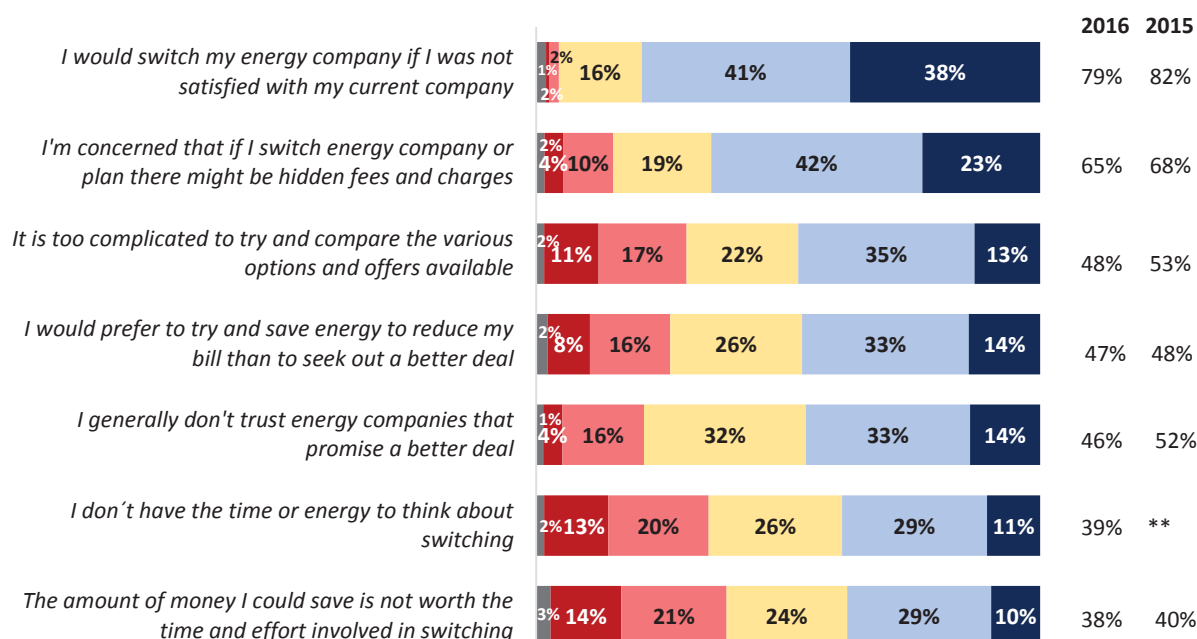
To further understand market outcomes and consumer sentiment, participants were asked the extent to which they agreed or disagreed with several statements about switching, with the results illustrated over the page.

The strongest agreement levels were in line with 2015 findings for the statements: *I would switch my energy company if I was not satisfied with my current company* (79% residential, 82% of small businesses) and *I'm concerned that if I switch there will be hidden fees and charges* (65% residential, 57% small business).

Attitudes to Switching (New South Wales)

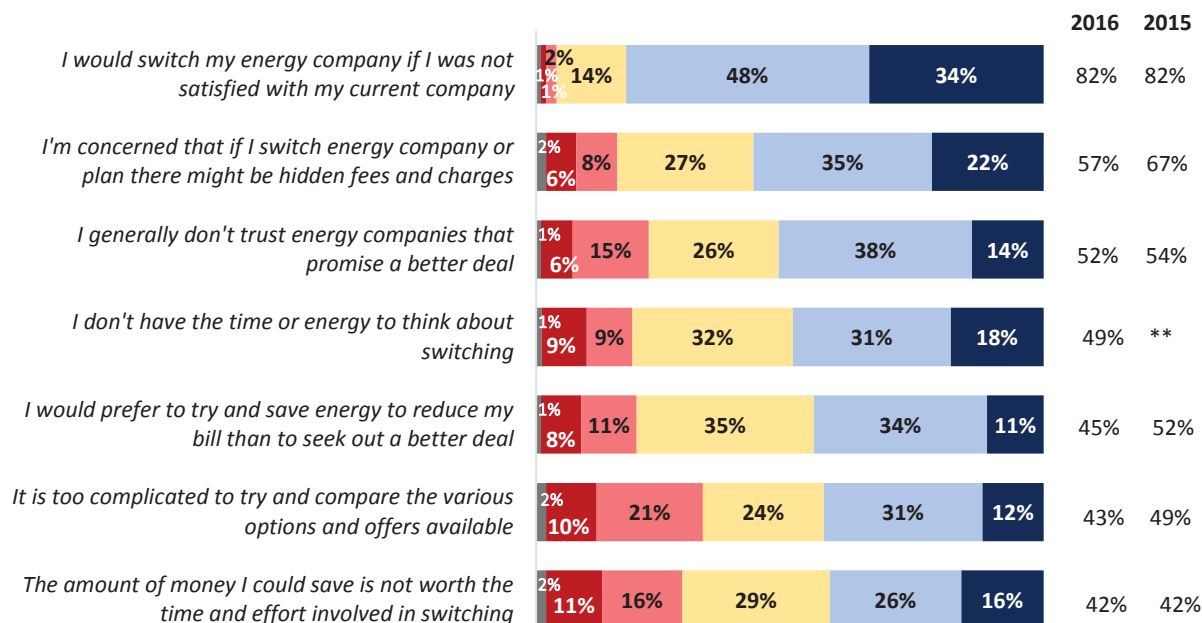
Residential

NETT Agree



Business

NETT Agree

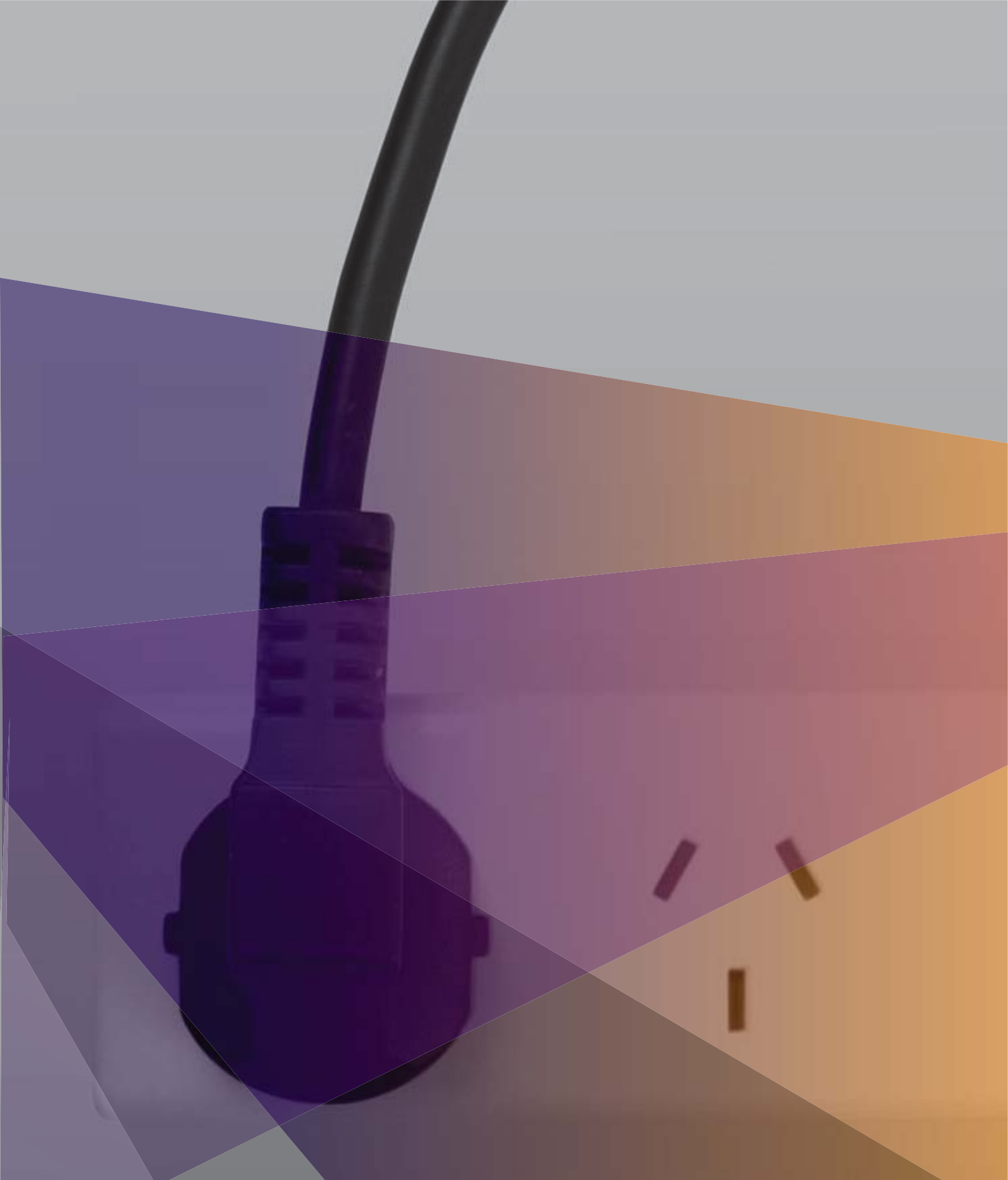


■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly Agree

Base: All survey participants (Residential: 2015 n=402, 2016 n=480). Small businesses: 2015 n=100, 2016 n=100).

NB: New question in 2015. / ** Question not asked in 2015.

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...



AUSTRALIAN CAPITAL TERRITORY

4 Australian Capital Territory

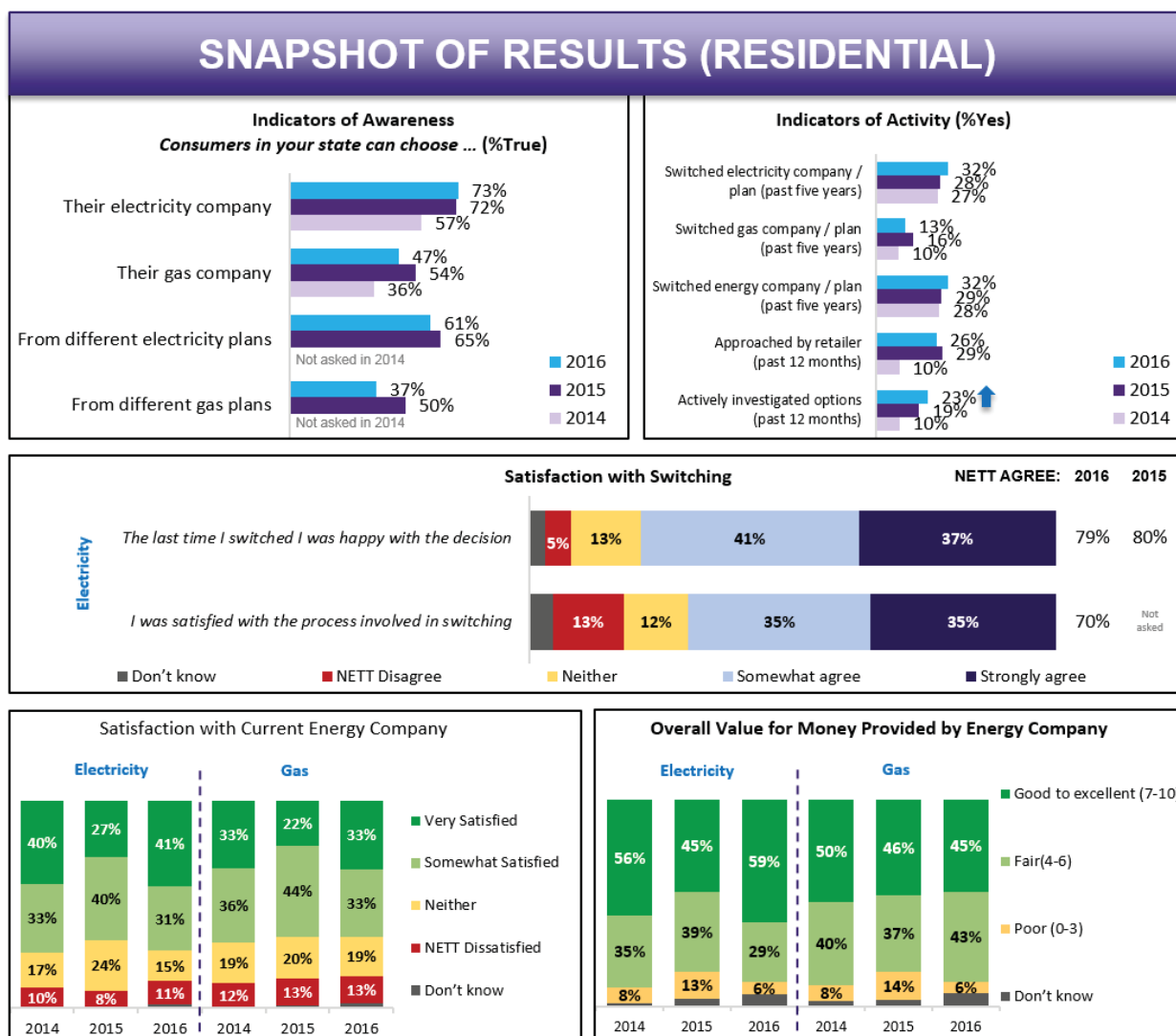
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4.1 Snapshot of Results

Australian Capital Territory (ACT) consumers' awareness of their ability to choose different companies and offers in the energy market remains lower than other NEM jurisdictions. While the majority are aware they can choose their electricity company (residential: 73%, businesses: 72%), fewer than half (47%) of residential consumers know they can choose their gas company.

Confidence is building, with more ACT consumers feeling confident they can find the right information about energy offers and deals, and that they could choose the right one for them – i.e. 55% of residential consumers and 54% of small business consumers rated their confidence in choosing the right option as 7 or more out of 10, up from 38% and 32%, respectively. Despite this, awareness of comparator websites remains low, including for the Energy Made Easy comparator site (0% unprompted awareness among residential consumers and just 3% with prompting).

Switching rates in the past five years across energy companies and plans has remained stable among residential ACT consumers (at 32% in 2016) but declined significantly among small businesses (from 36% in 2014 down to 16%). Most of those who switched were again happy with their decision to do so (e.g. 79% of residential electricity company switchers). Satisfaction with the level of market choice increased to the highest levels so far, significantly so among residential consumers (to 47%, from 34% in 2015). However, fewer residential ACT consumers indicated they were interested in looking for a better deal: from 63% nett currently looking or interested but not looking in 2015, down to 46%).



4.2 Key Findings

4.2.1 Consumer Activity

Introduction

This section of the report details findings about ACT consumers’:

- Awareness and knowledge of choice options in energy markets;
- Incidence and time spent investigating energy deals and offers in the last year;
- Reasons for *not* investigating different offers and options;
- Reported ease of comparing different offers and options;
- Used and preferred information sources for investigating different offers and options;
- Awareness of comparison websites – unprompted and prompted;
- Rates of switching energy company, plan and/or deal and the incidence of sales approaches from energy companies;
- Drivers: unprompted motivations and the level of importance of various factors in the decision to switch company/plan, and dollar savings needed for consumers to seriously consider switching;
- Current behaviours and intentions regarding switching – whether currently looking or interested in seeking a better deal.

The Results

ACT consumers’ awareness of their energy market options was much lower than the rest of the NEM, and while the majority knew they could choose their own electricity company or plan, fewer consumers knew they could choose from a range of different gas plans

As charted on the following pages, and in line with the 2015 results, the majority of consumers surveyed in the ACT were aware they could choose their electricity *company*: 73% of residential consumers and 72% of small businesses. For residential consumers, this is significantly higher than the 2014 benchmark result (57%), and it is also higher for small businesses surveyed that year (63%).

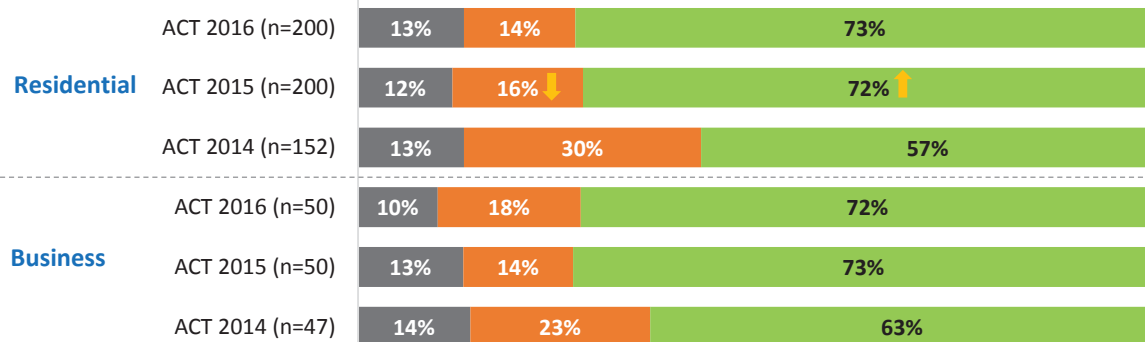
However, fewer than half (47%) of residential ACT consumers were aware they could choose their *gas* company, which is a slight but not statistically significant decline from 2015 (54%).

Among residential consumers, awareness of the option to choose from different energy *plans, price structures, contract lengths and terms* was relatively stable against the 2015 results for electricity (at 61%, marginally down from 65%), but fell significantly regarding gas offers (from 50% to 37% of gas consumers).

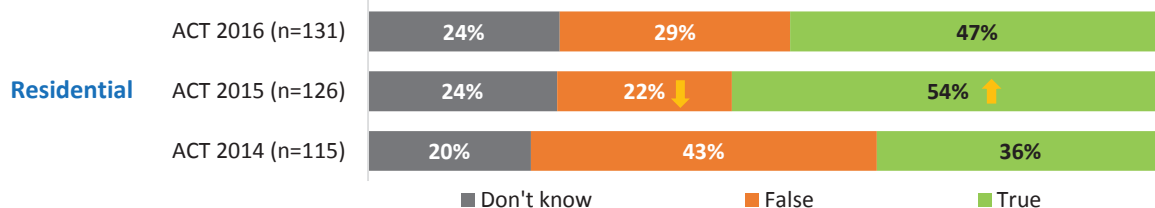
Among *business* consumers, awareness of the ability to choose from a range of electricity plans and options fell slightly from 71% in 2015 to 60% this year.

Awareness of Ability to Choose Energy Company (Australian Capital Territory)

Consumers can choose their electricity company



Consumers can choose their gas company

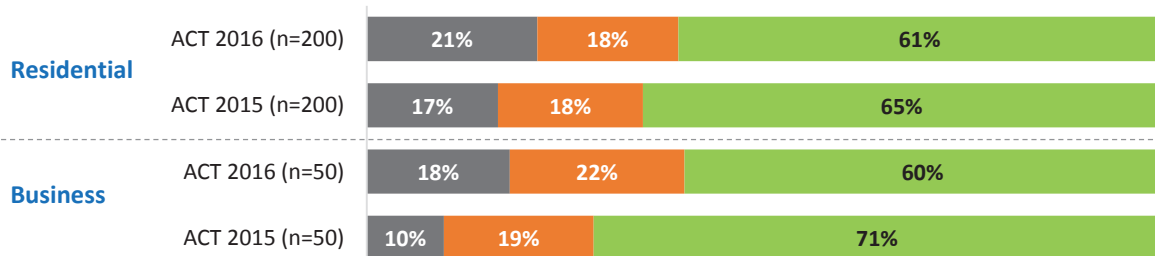


Base: All survey participants. NB: Gas results for small business consumers not shown due to small sample size (n=11).

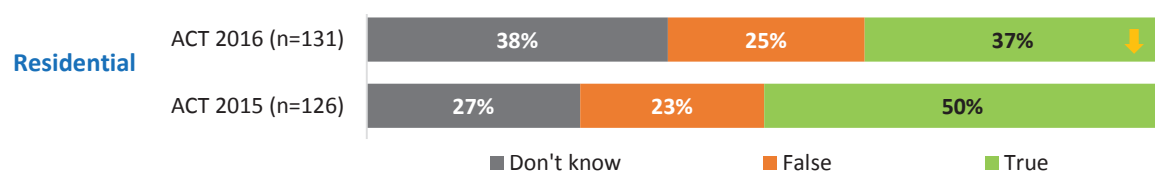
Q13. Please tell me whether you think the following statements are True or False. a) Consumers in the ACT can choose their electricity company. b) Consumers in the ACT can choose their gas company.

Awareness of Ability to Choose From Different Energy Plan or Offer (Australian Capital Territory)

Consumers can choose their electricity plans and options



Consumers can choose their gas plans and options



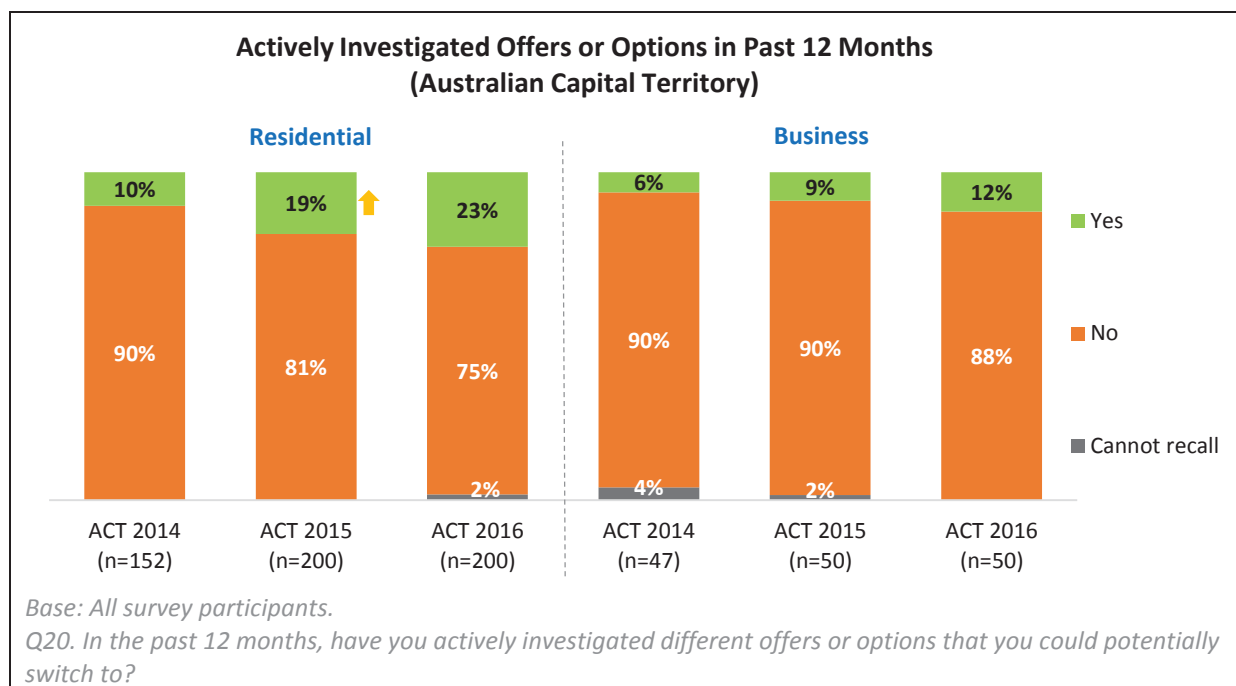
Base: All survey participants. NB: Gas results for small business consumers not shown due to small sample size (n=11).

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.

There is a growing proportion of ACT consumers actively investigating offers or options, although they remain a small minority

Almost a quarter of residential consumers (23%) had actively investigated energy offers or options in the past 12 months; trending upwards and significantly higher than the 2014 benchmark (10%).

While not statistically significant, the proportion of small business consumers who had actively investigated alternatives has doubled since the benchmark (from 6% in 2014 up to 12%).



The most common reason residential consumers didn't investigate their options was satisfaction with their retailer, while for small business consumers it was being too busy and lacking the time

As charted over the page, among *residential consumers* who had *not* investigated options or switched provider or plan, the main unprompted (and subsequently manually coded) reason was that they were happy with their current retailer, at 34% (significantly higher than the 2015 result of 15%).

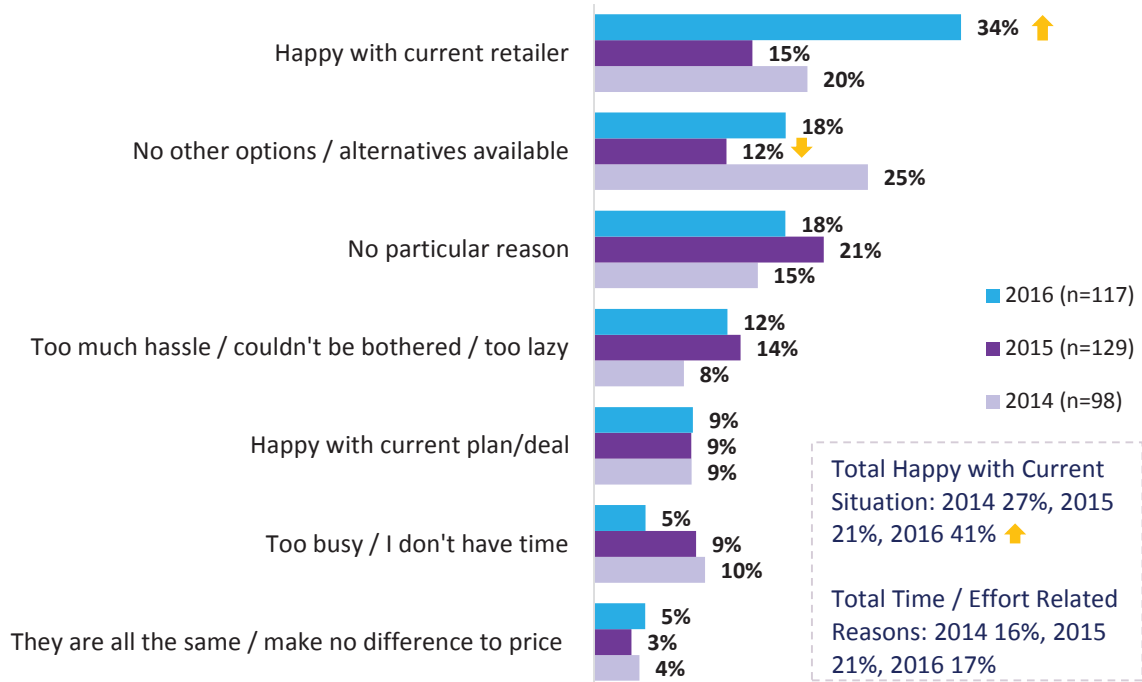
Other secondary reasons included there being no other options available (18%, which is up from 2015 but below the 2014 benchmark of 25%) or that it was too much of a hassle (12%, similar to levels in previous years – e.g. 8% in 2014).

Among *business consumers* who had neither investigated options nor switched provider or plan, the main reasons given were similar to 2015, as charted over the page. The key reasons were being too busy (26%) or happy with their current retailer (21%).

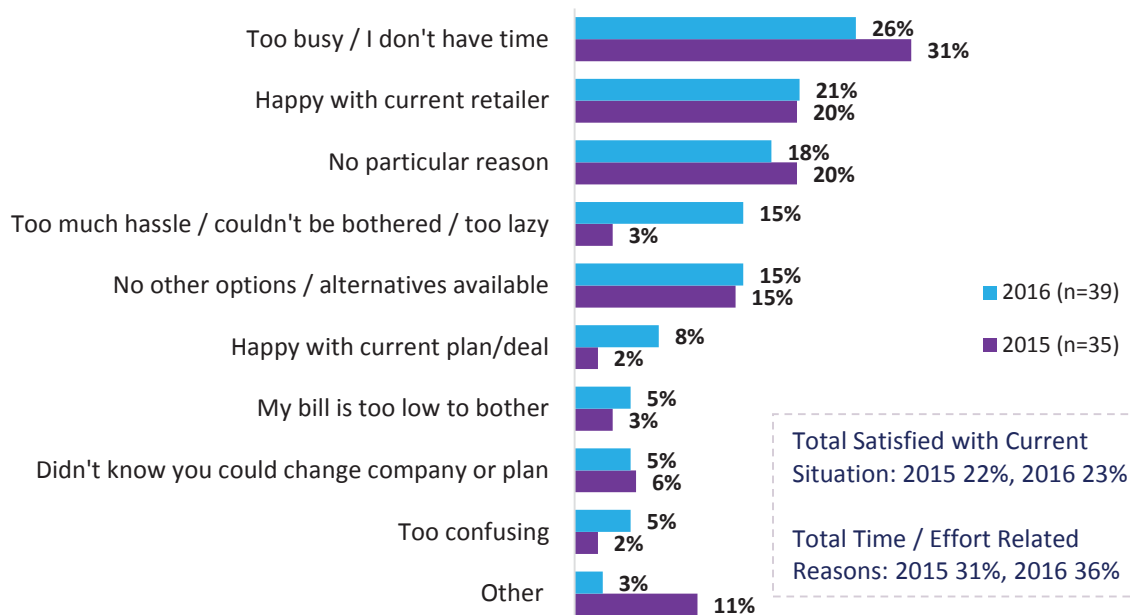
Other reasons were that it was too much of a hassle (15%; a large but not significant jump from 3% in 2015), and that there were no other options available (stable at 15%).

Main Reasons for Not Investigating or Switching (Australian Capital Territory) - Unprompted, Top Mentions 3%+

Residential



Business



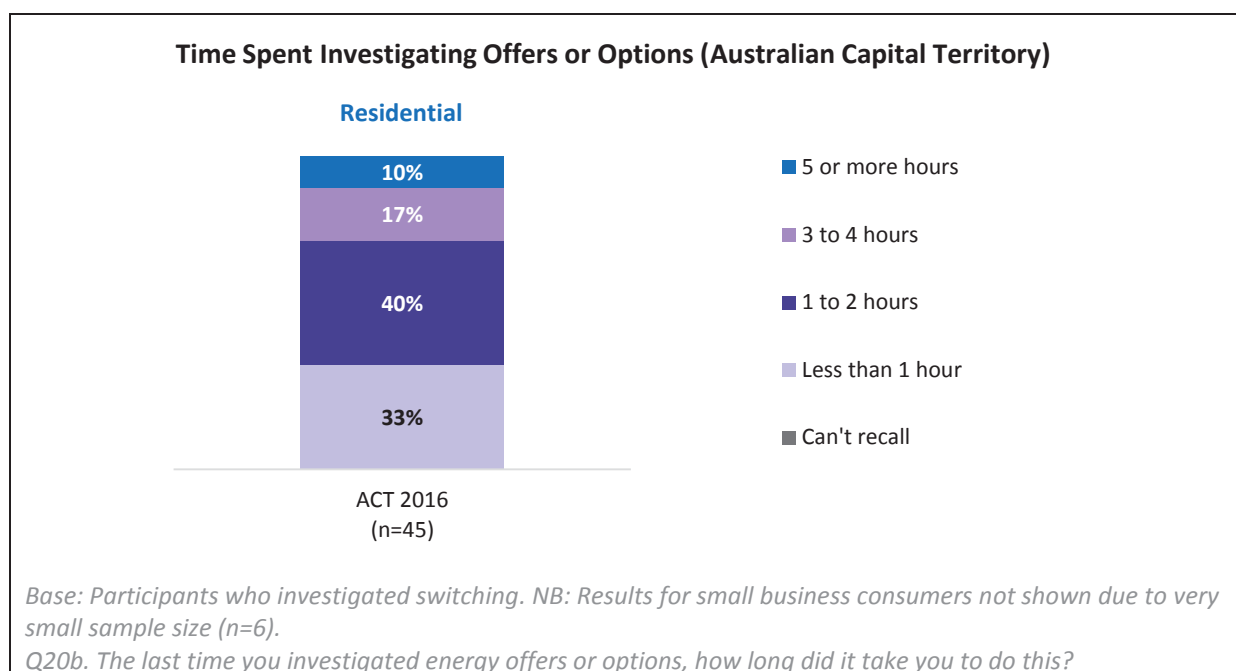
Base: Participants who had not investigated offers and options or switched in the past 12 months.

NB: 2014 business 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? MULTIPLE RESPONSE.

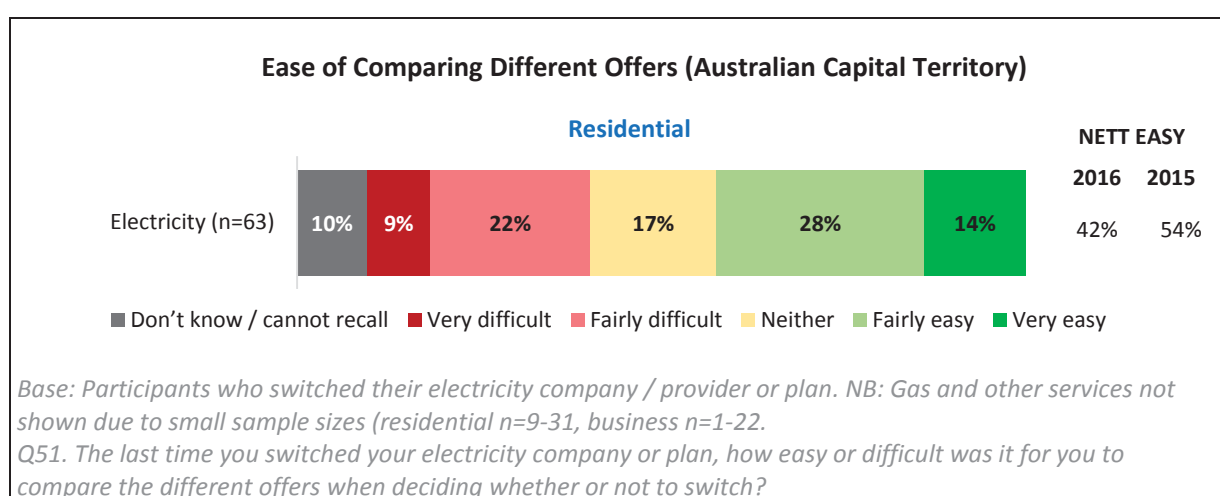
Most who investigated their energy options spent no more than two hours doing so

Among residential consumers who investigated options, almost three-quarters (73%) estimated that they spent no more than two hours investigating different options and offers they could switch to. By comparison, just 10% of those who looked into their options spent five or more hours doing so.



Fewer than half of ACT consumers found comparing electricity offers and options easy

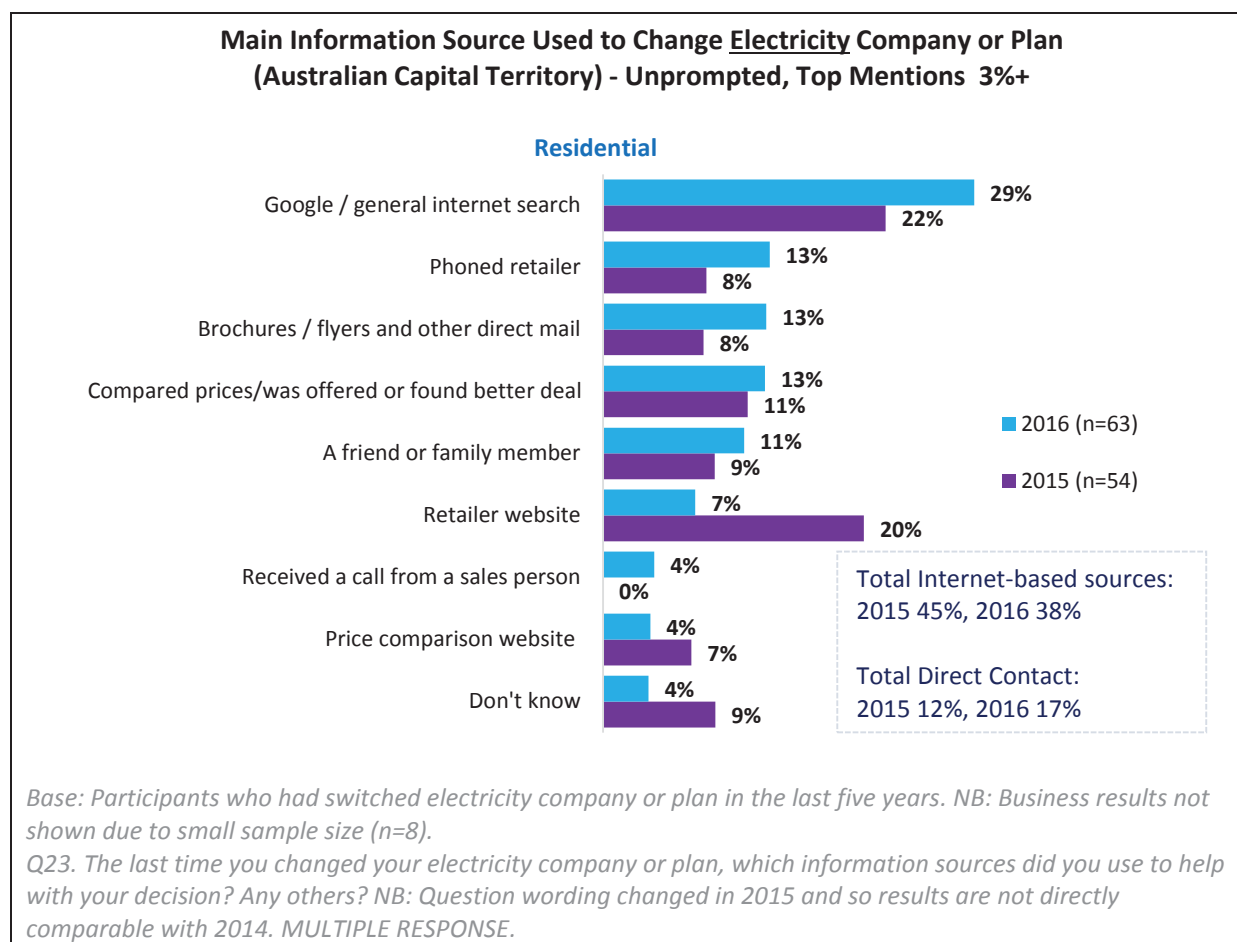
Among residential consumers who had switched energy company or plan in the past five years, just over one in four (42%) found it fairly or very easy to compare electricity offers and options – down somewhat but not significantly from 54% in 2015 (note the small sample size).



In line with 2015, the internet was the most used information source to help residential consumers decide to switch electricity company or plan

One of the research objectives was to measure the incidence of consumers using various information sources to help with their decision to switch.

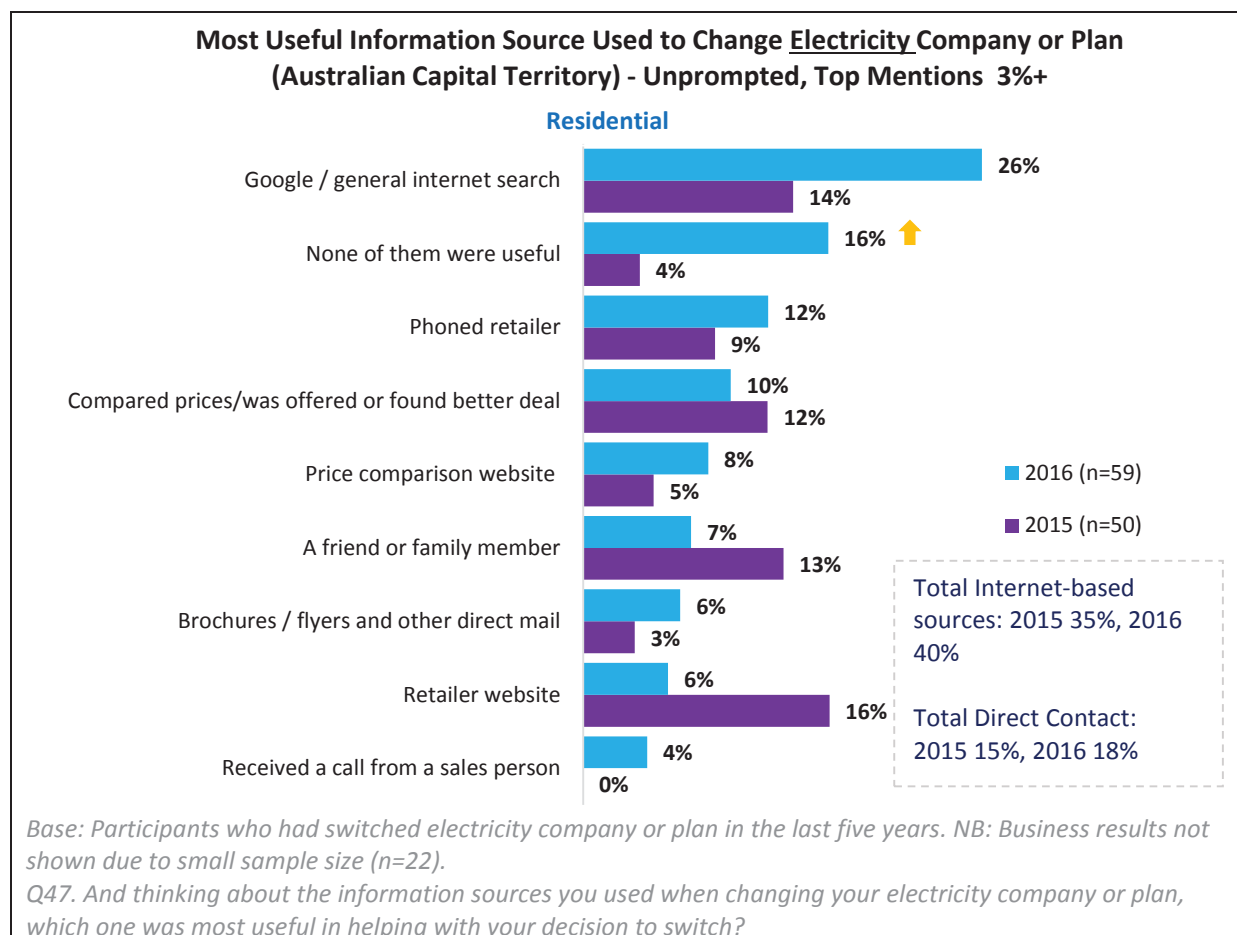
Among residential consumers who had switched energy company or plan / offer in the past five years, almost two-fifths (nett 38%) had used some form of internet-based source (down slightly from 45% in 2015). A Google or general internet search was the most commonly mentioned 'specific' source (29%, up from 22% in 2015). Direct contact, such as phoning a retailer, was used by around one in six residential consumers (nett 17%, up slightly from 12% in 2015).



Sample sizes were insufficient to examine the information sources used to help inform decisions to switch gas company or plan.

Among switchers, internet-based sources were not only the most popular but also the most useful

Consumers who had switched an energy company or plan were also asked which information source they thought was most useful. For *residential consumers who had switched electricity company or plan in the past five years*, internet-based sources remained the most useful (nett 40%), followed by direct contact such as phoning retailers (nett 18%). While results were largely consistent year-on-year, there was a significant jump in the proportion who felt that none of the sources they had used were useful (16%, up from 4% in 2015).

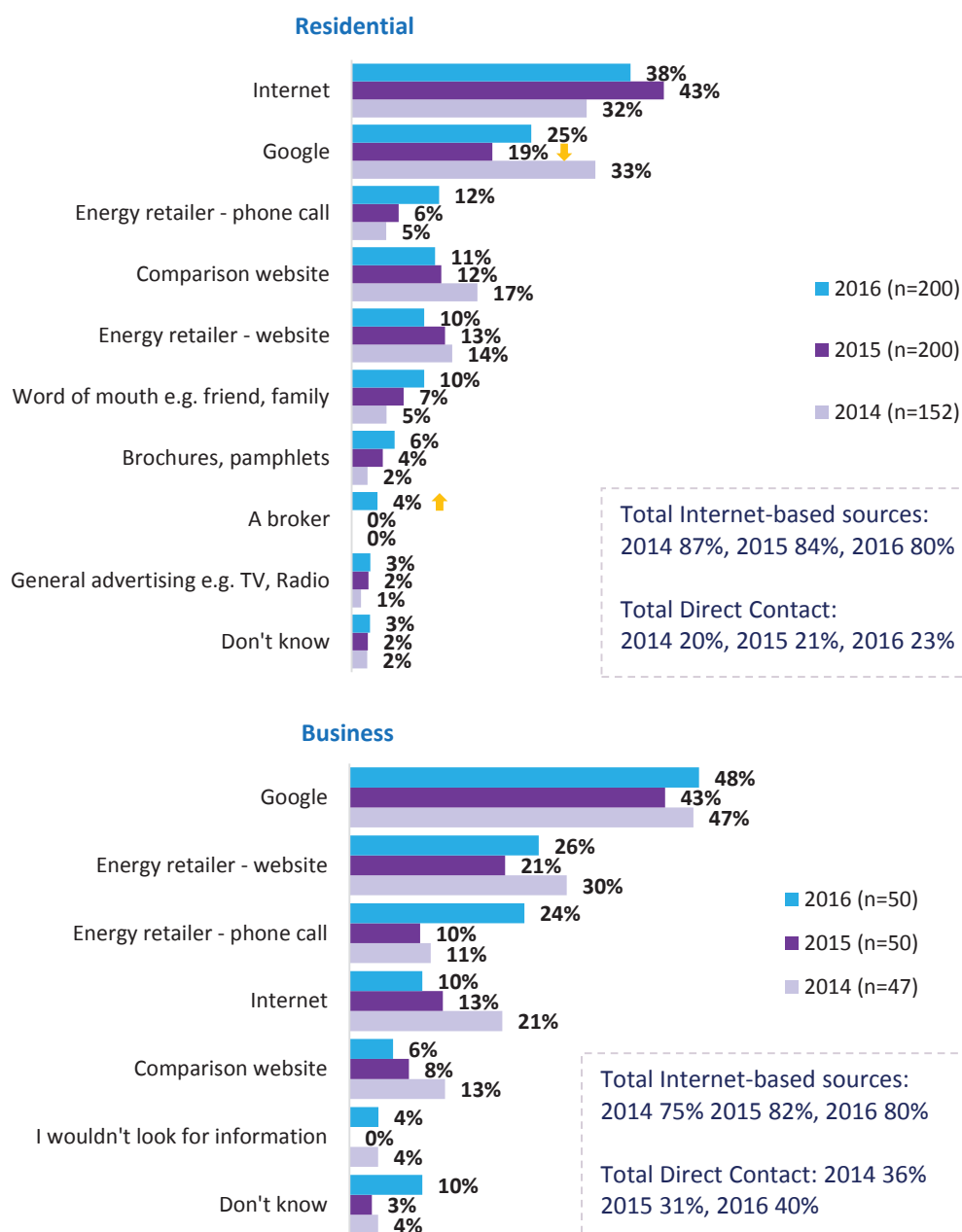


Results for the above questions in relation to gas and business consumers are not shown due to extremely small sample sizes.

Among all consumers surveyed, if they were looking for information about energy offers, most would still prefer internet sources

Year-on-year, the *most preferred* information source among *all consumers surveyed* if they were trying to find information about different energy retailers and plans remains the internet, at nett 80% for both residential and business segments. Over time this represents a slight downward trend for residential consumers, from 87% in 2014.

Preferred Information Source for Information about Different Retailers or Plans (Australian Capital Territory) - Unprompted, Top Mentions 3%+



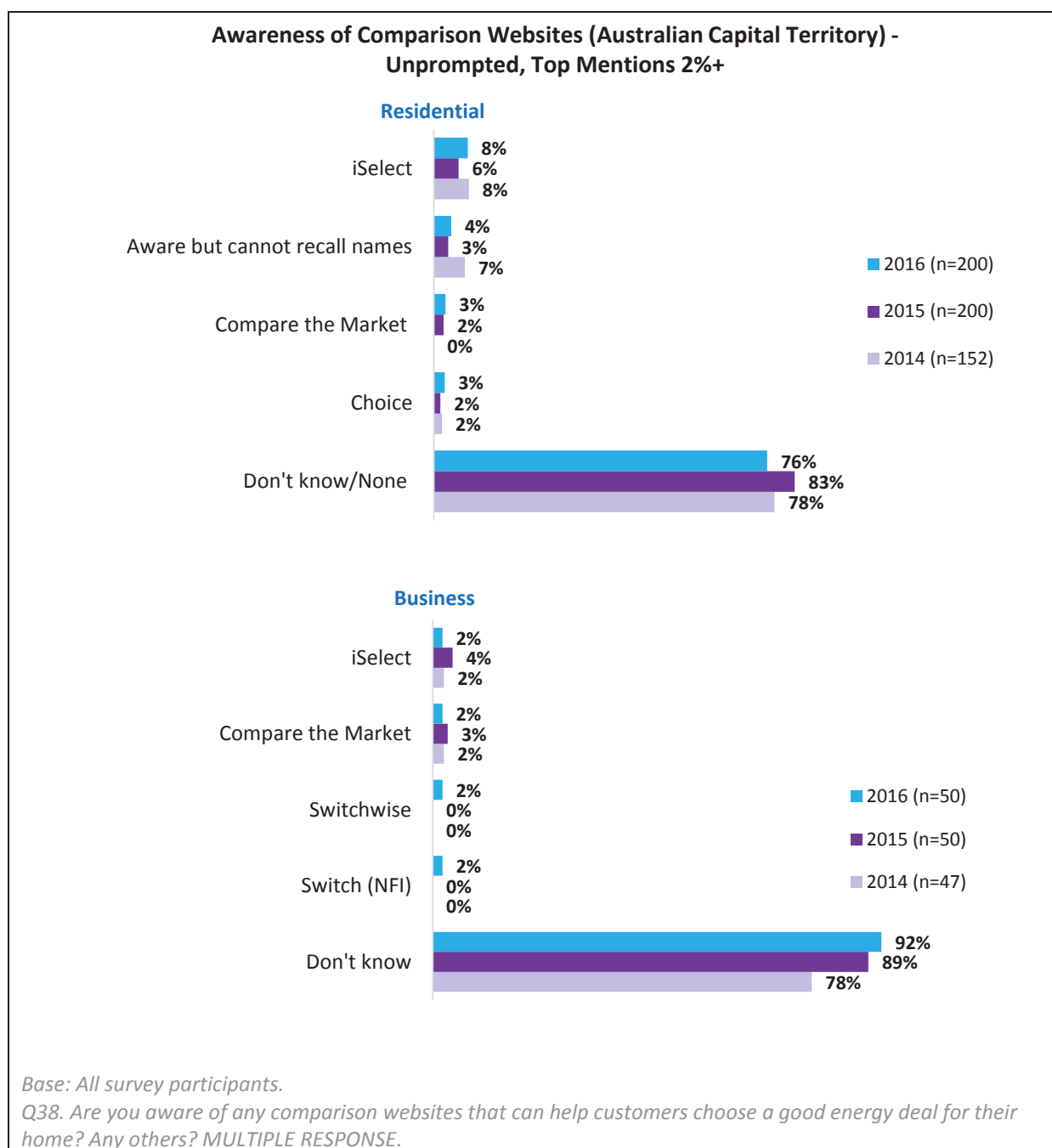
Base: All survey participants.

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?*

Unprompted recall of comparison websites remained very low among ACT consumers, with awareness the highest for iSelect, at 8%

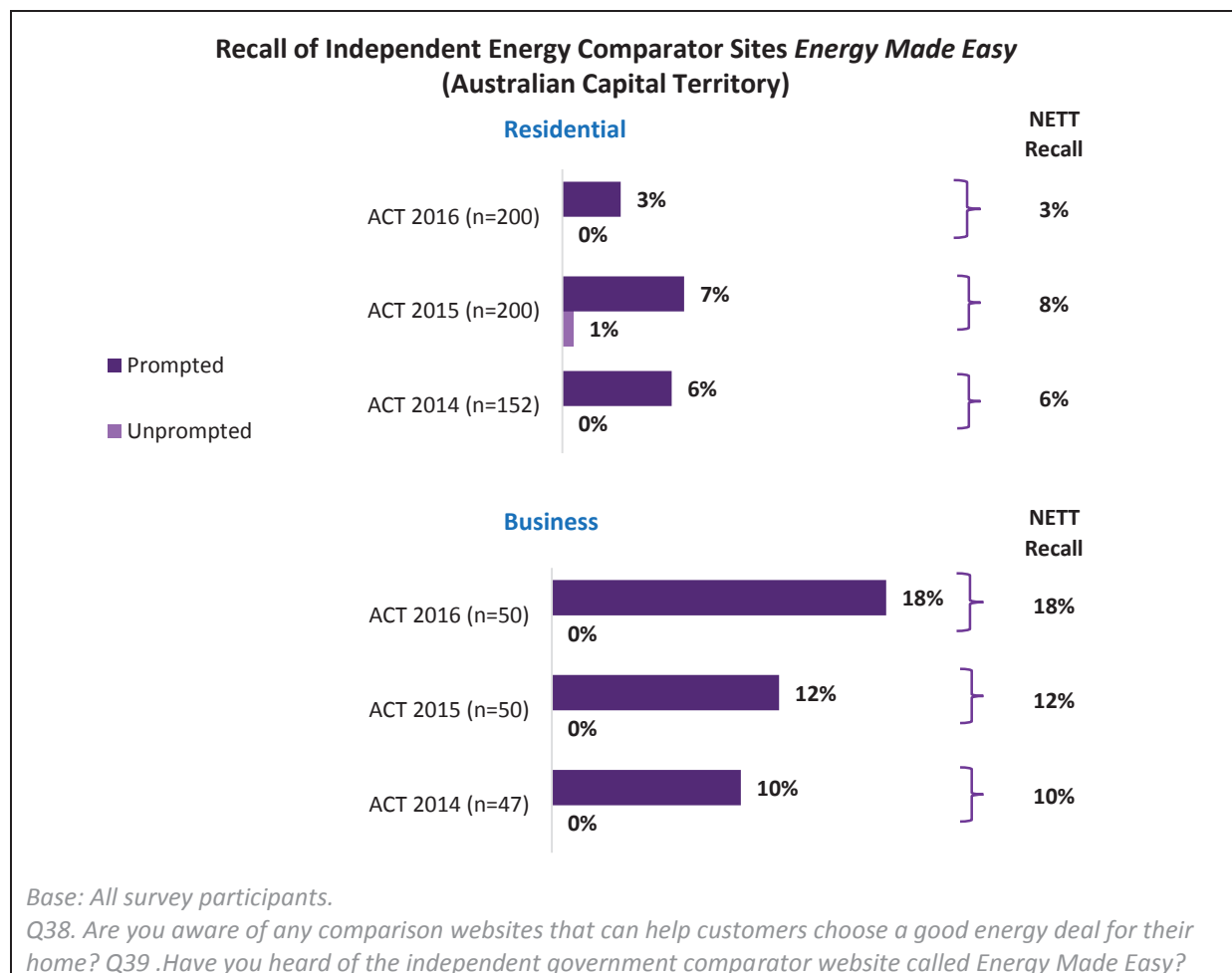
When asked if they were aware of any comparison websites that can help consumers choose a good energy deal for their home, around three-quarters of ACT residents surveyed (76%) were unaware of any. Recall of the most commonly mentioned comparison site, iSelect, was relatively unchanged at 8%. This was followed by Compare the Market and Choice (both at 3%).

Small business consumers were even less aware of any comparison websites – i.e. 92% were unable to name any, unprompted.



Both unprompted and prompted recall of the Energy Made Easy website was extremely low among residential consumers, but higher among small businesses

Among residential consumers, there was a very low level of awareness of the Energy Made Easy website (nett 3% unprompted and prompted). Small business consumers in the ACT were more likely to have heard of it (nett 18% aware).



Switching rates have remained relatively unchanged among residential consumers but have declined among business consumers

The incidence of switching energy company and/or plan *in the last five years* has remained the same among residential consumers (32% in 2016 compared with 29% in 2015 and 28% in 2014). These levels are in line with residential switching rates for internet (35%), car insurance (34%) and mobile phones (32%) in the ACT, yet remain significantly lower than across the NEM overall (49% in 2016).

Among *business* consumers, the incidence of switching has declined steadily since the 2014 benchmark, though not significantly – likely due to the small sample (from 36% in 2014 to 16% in 2015).

Switching rates *in the past 12 months* increased slightly among residential consumers (from 12% in 2015 to 19% in 2016), driven by a significant increase in those switching electricity plans (up from 6% in 2015 to 13%). Results were essentially unchanged among business consumers, with 8% having switched in the last 12 months.

In 2016, residential consumers who had actively investigated offers and options were more likely to have switched in the last five years (57%) than those who had not actively looked (24%). This is in line with the

increase observed in 2015 (i.e. 57% who investigated had switched, up from 35% in 2014), suggesting a sustained level of conversion from investigation to switching once consumers start to explore their options in the ACT. Those who had actively investigated were also more likely to have switched in the last 12 months (44% vs. 11% respectively).

Switching Rates for Various Service Providers - Last Five Years

Incidence of Switching (% switched at least once in <u>last five years</u>)	AUSTRALIAN CAPITAL TERRITORY Residential			AUSTRALIAN CAPITAL TERRITORY Business		
	2014 (n=152)	2015 (n=200)	2016 (n=200)	2014 (n=47)	2015 (n=50)	2016 (n=50)
Electricity Company	16%	15%	15%	23%	9%	4%
Electricity Plan	21%	17%	23%	26%	24%	14%
TOTAL Electricity	27%	28%	32%	36%	26%	16%
Gas Company	9%	10%	6%	Not shown due to small sample size		
Gas Plan	8%	9%	8%			
TOTAL Gas	10%	16%	13%			
TOTAL Electricity or Gas	28%	29%	32%	Business consumers not asked these questions		
Car Insurance	31%	36%	34%			
Mobile	38%	37%	32%			
Internet	35%	35%	35%			
Home Insurance	17%	27% ↑	23%			
Home Phone	24%	24%	22%			
Banking	16%	19%	18%			
Health Insurance	10%	15%	17%			

Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample sizes: 2016 (n=11), 2015 (n=9).

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?

Switching Rates for Various Service Providers - Last 12 Months

Incidence of Switching (% switched at least once in <u>last 12 months</u>)	AUSTRALIAN CAPITAL TERRITORY Residential		AUSTRALIAN CAPITAL TERRITORY Business	
	2015 (n=200)	2016 (n=200)	2015 (n=50)	2016 (n=50)
Electricity Company	6%	5%	2%	4%
Electricity Plan	6%	13% ↑	6%	4%
TOTAL Electricity	11%	18%	7%	8%
Gas Company	6%	2%	Not shown due to small sample size	
Gas Plan	3%	6%		
TOTAL Gas	7%	8%		
TOTAL Electricity or Gas	12%	19%		

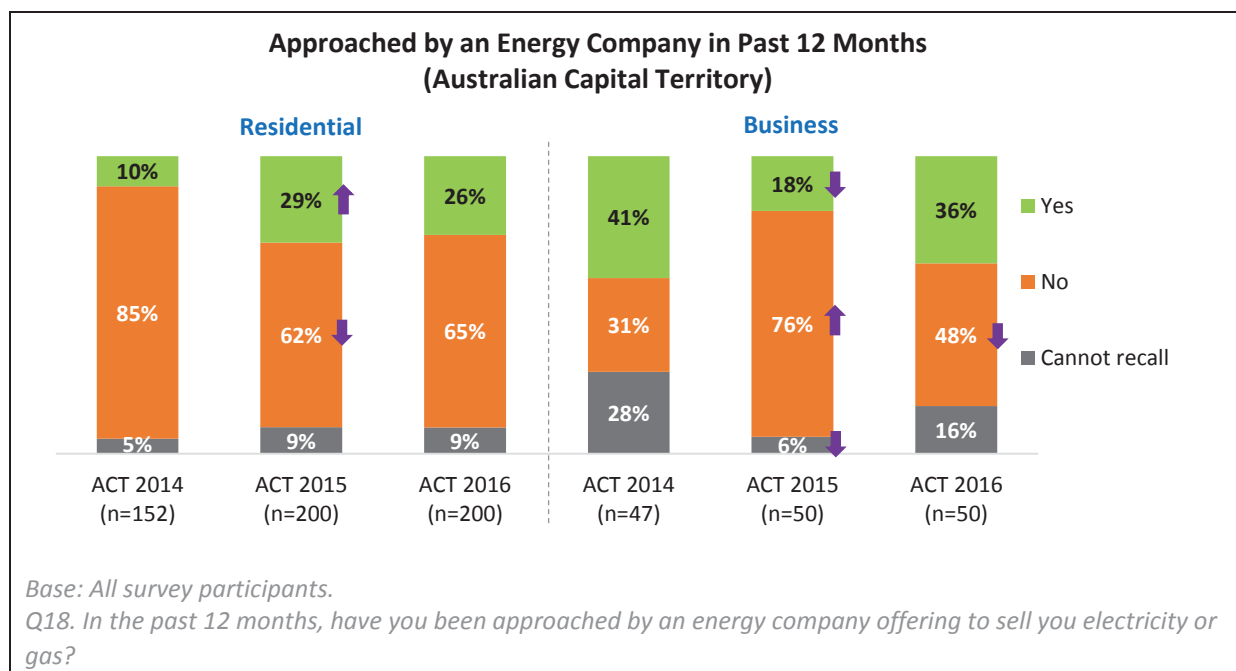
Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample sizes: 2016 (n=11), 2015 (n=9).

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?

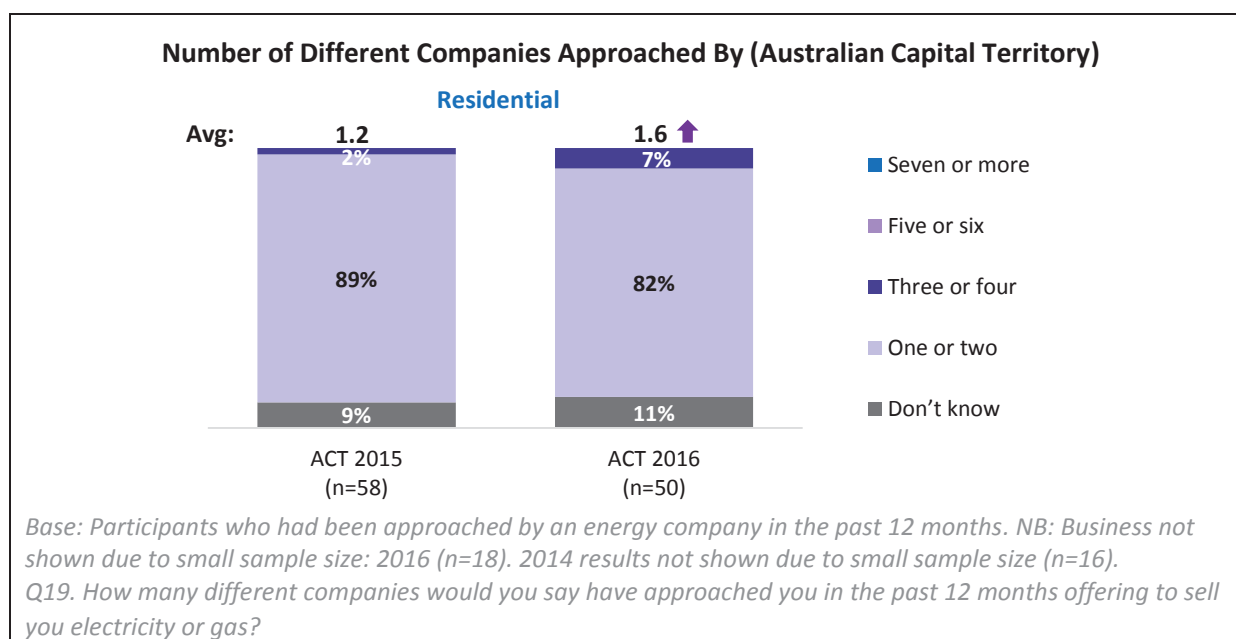
Direct approaches stable for residential consumers, while fluctuating for small businesses surveyed

Over a quarter of ACT residential consumers claimed they were approached by an energy company offering to sell them electricity or gas in the past 12 months (26%), which is consistent with 2015 results (29%). This remains significantly higher than the 2014 benchmark of just 10%.

Meanwhile, the proportion of *small business* consumers who reported being approached by an energy company doubled from the 2015 result (from 18% up to 36%), though this remained slightly below the 2014 benchmark of 41%.

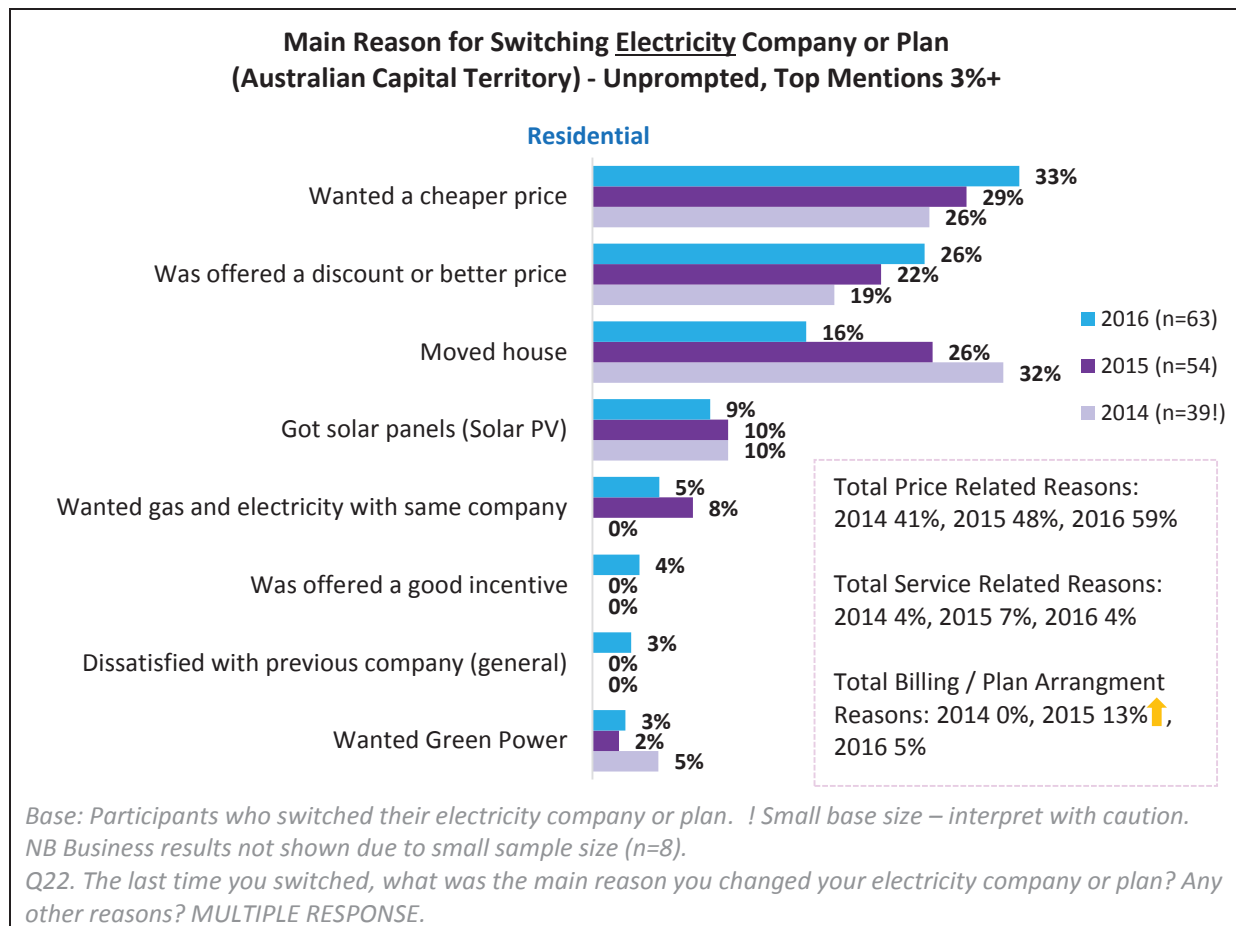


As shown below, there was a significant increase in the average number of companies that residential consumers reported being approached by in the past 12 months, from 1.2 in 2015, to 1.6 this review. Results for 2014 and businesses are not shown due to very small sample sizes.



Price related factors remain the main unprompted reason for switching

Price related factors (e.g. wanting a cheaper price or being offered a discount) were the standout reasons for switching electricity company or plan in 2016. Around three in five (nett 59%) residential consumers mentioned these reasons unprompted, up slightly from previous years but not significantly so (likely due to small sample sizes).



Residential and business results for gas are not shown due to small sample sizes (residential n=16, business n=1).

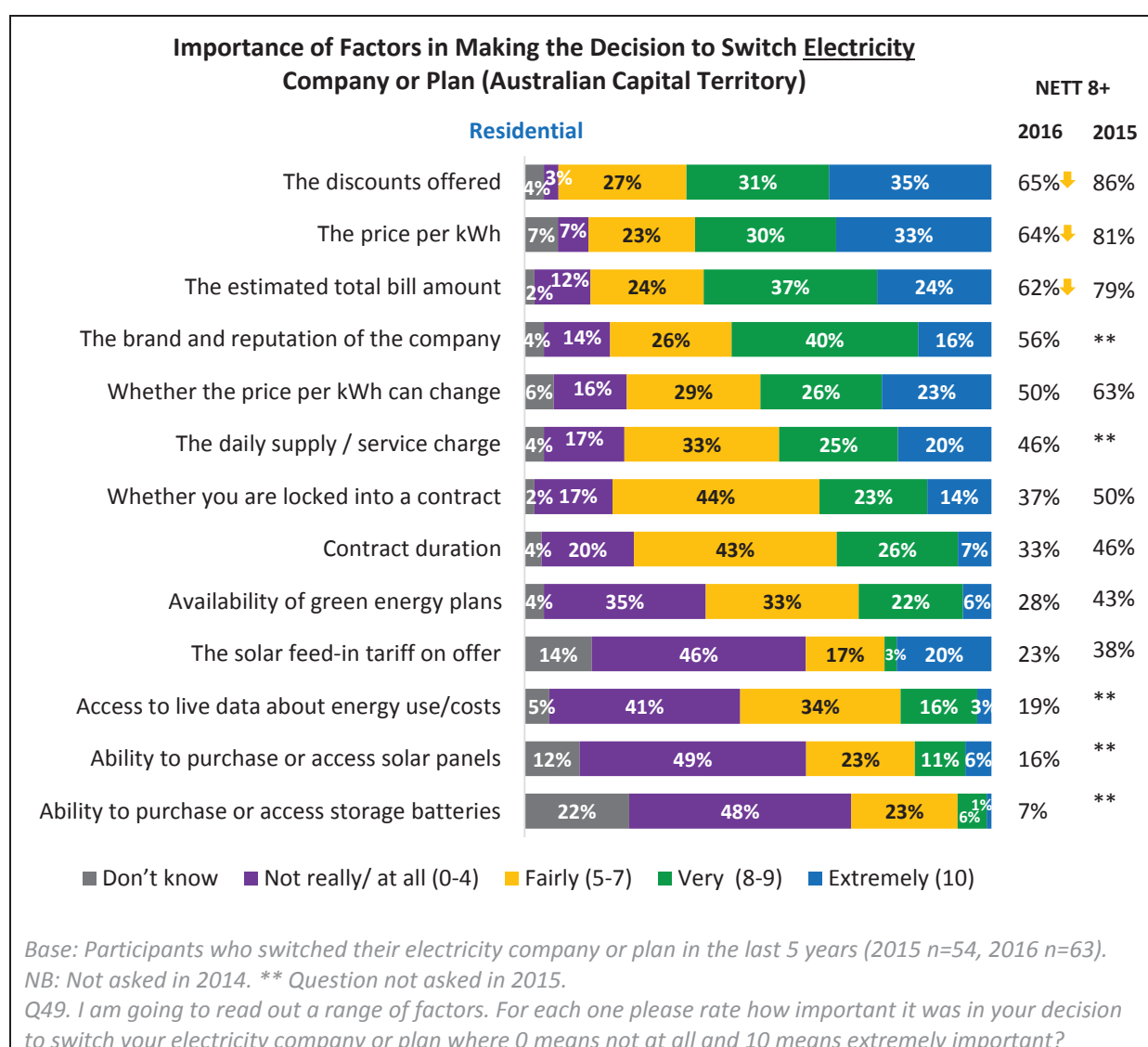
When prompted with a range of considerations, the discounts offered and the price per kWh were considered the most important factors in the decision to switch electricity company or plan

To further understand the relative importance of the drivers of switching behaviours, survey participants *who had switched electricity company or plan in the last 5 years* were prompted with a randomised range of factors and asked to rate how important they were in their decision to switch, on an 11-point scale (0 = not at all, 10 = extremely important).

The most important ones for *residential* consumers were the discounts offered (nett 65% rating this 8 or above), the price per kWh (64%) and the estimated total bill amount (62%). These were all significantly lower than results from the 2015 study – down from 86%, 81% and 79% respectively.

Of least importance were the ability to access storage batteries (7%), solar panels (16%), and live data about their energy use and costs from the retailers – all new factors introduced this year.

Due to very small samples sizes, results are not displayed for residential consumers who had switched gas (n=16), and business consumers who had switched either electricity (n=8) or gas (n=1).



ACT consumers with higher energy bills wanted to see a bigger saving before considering switching

In order to seriously consider switching their company or plan, on average residential consumers indicated that they would need to save \$225 per year on their electricity bill, which is in line with the 2015 result (\$230). For their gas bill, the amount was very similar at \$228 on average, and just slightly higher than the 2015 average (\$202).

Across electricity and gas, residential consumers relatively high bills were generally looking for a much larger saving than others, as shown in the tables below.

By comparison and reflecting their higher average energy bills, *small business consumers* felt they would need to save an average of \$768 on their electricity bill in order to consider switching, which is lower than in 2015 (\$965) but not significantly so, likely due to the small sample.

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	ACT Residential		ACT Business	
	2015 (n=200)	2016 (n=200)	2015 (n=50)	2016 (n=50)
Total	\$230	\$225	\$956	\$768
Last Quarterly Electricity Bill: Low	\$203	\$208	\$327	\$404
Last Quarterly Electricity Bill: Medium	\$214	\$194	\$453	\$841
Last Quarterly Electricity Bill: High	\$369	\$271	\$1,551	\$1,055

Base: All survey participants.

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? Residential: "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above. Business: "Low" is <\$500, "Medium" is \$500 to <\$1,000, "High" is \$1,000 and above.

Amount Needed to Save Annually on <u>Gas</u> Bill to Seriously Consider Changing (Average by Bill Size)	ACT Residential	
	2015 (n=126)	2016 (n=131)
Total	\$202	\$228
Last Quarterly Gas Bill: Low	\$177	\$196
Last Quarterly Gas Bill: Medium	\$261	\$178
Last Quarterly Gas Bill: High	\$195	\$261

Base: Participants 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? "Low" is <\$200, "Medium" is \$200 to <\$300, "High" is \$300 and above.

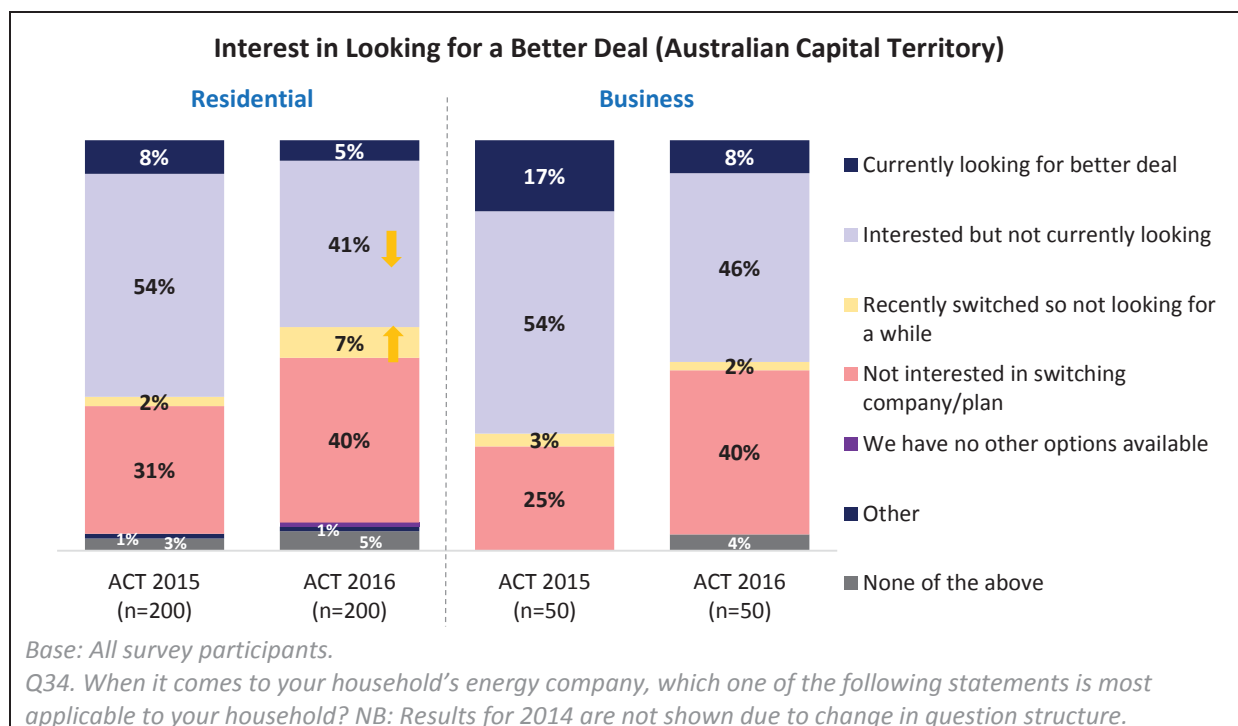
Around half of the ACT consumers surveyed were either seeking or interested in a better deal

When asked about their current behaviours and intentions in relation to switching, almost half of the residential consumers (nett 46%) were *currently looking* or *interested in looking for a better deal*. This is significantly lower than in 2015 (nett 63%).

Slightly more business consumers were *currently looking* or *interested in looking for a better deal* (54%), although this is down from 71% in 2015.

Meanwhile, two-fifths of both residential (40%) and business (41%) consumers were not interested in switching company or plan at all, while a small proportion of consumers (7% residential, 2% businesses) said they had recently switched so were not going to look for a while – significantly higher year-on-year for residential consumers (from 2% in 2015).

Residential consumers who had *not* investigated offers and options in the last 12 months were more likely than those who had to say they were not interested in switching (40% vs. 16% respectively).



4.2.2 Consumer Outcomes

Introduction

This section of the report details the findings on ACT consumers’:

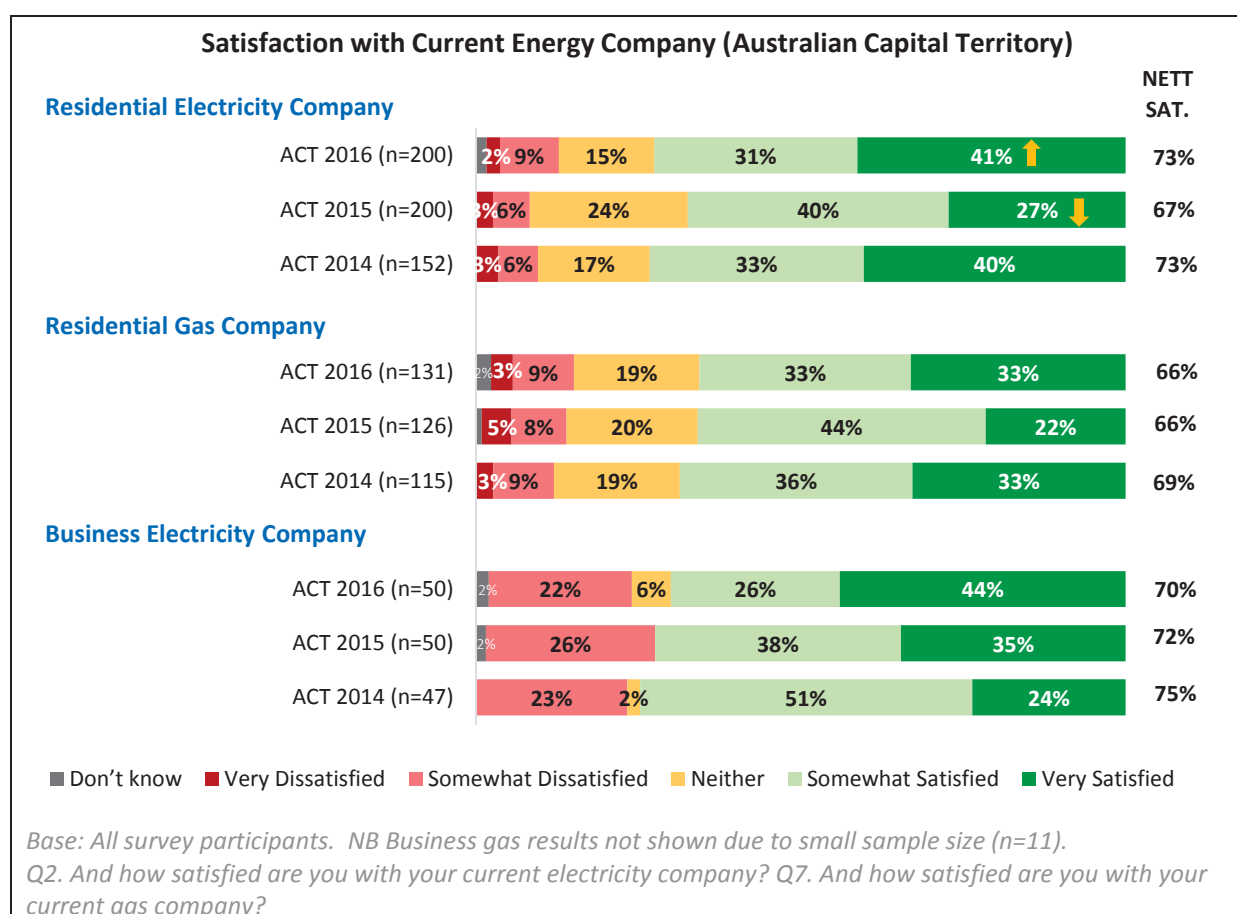
- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market;
- Satisfaction with the switching process among those who had done so; and
- Consumer confidence that they can find the right information and make the right choice in the market.

The Results

Nett satisfaction with electricity and gas companies was largely unchanged this year

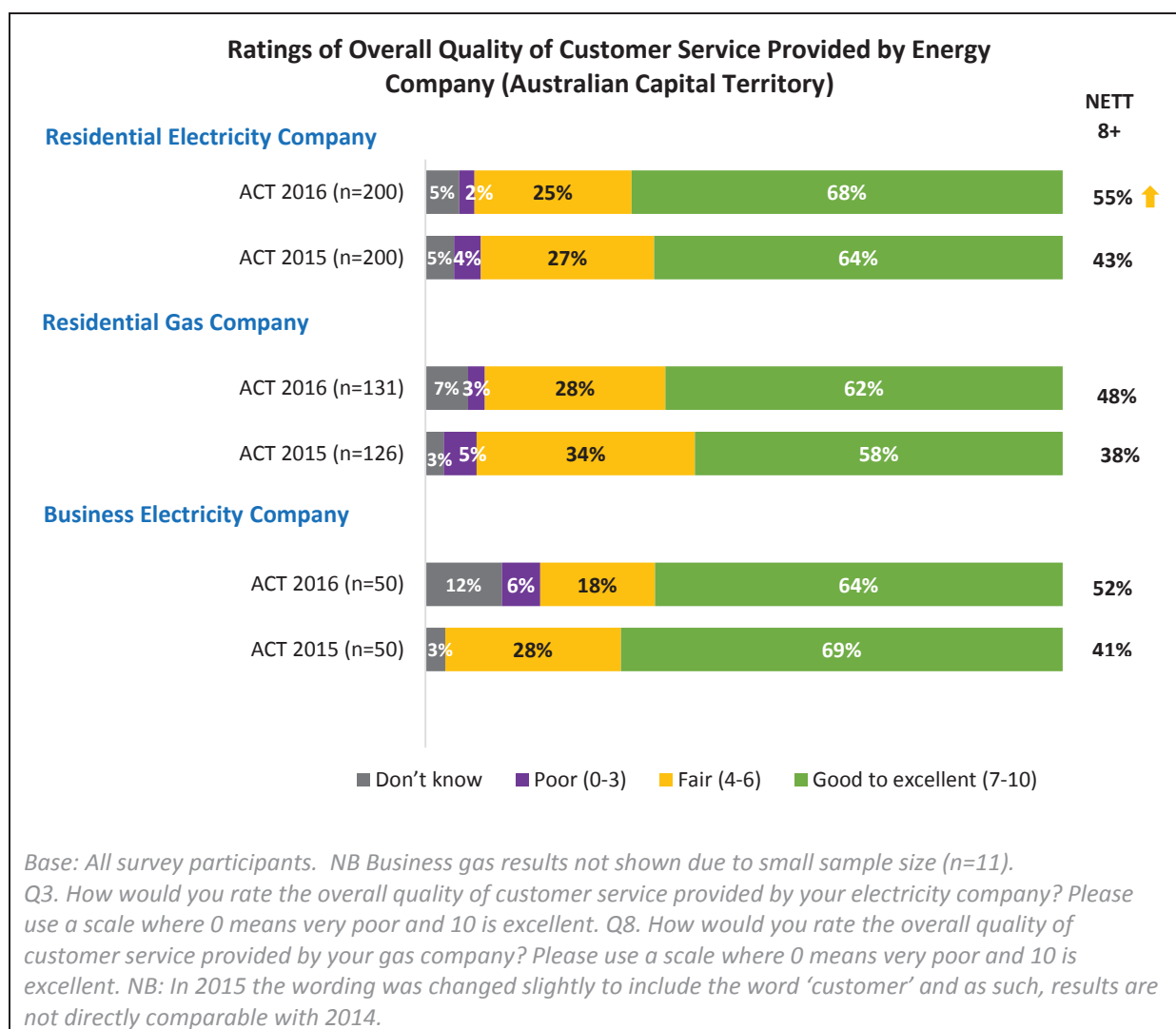
The proportion of residential consumers who were very or somewhat satisfied with their electricity company was similar to previous years (nett 73% in 2016, as per 2014), though it is worth noting the significant jump in the proportion of those who were *very* satisfied after a drop in 2015 (from 40% in 2014, to 27% in 2015, and back up to 41%). A similar result was observed for gas companies, with no overall change in the nett proportion of those satisfied (66%), but the proportion who were *very* satisfied returned to the benchmark level of 33% after a slight decline to 22% in 2015.

Among *small business consumers*, satisfaction levels were similar for their electricity company, with nett satisfaction remaining consistent over time (from 75% in 2014 to 70% this review). While not statistically significant due to small sample sizes, there is a growing trend in the proportion who are *very* satisfied (at 44%, up from 24% in 2014).



When it came to the *overall quality of customer service* provided by their electricity company, over half of residential consumers (55%) gave a high rating of 8 or more on a scale of 0 to 10, marking a significant increase from 42% in 2015. There was also an increase, though not significant, for the overall quality of customer service provided by their gas company (from 38% in 2015 to 48%).

Among small business customers, high service ratings of 8+ for electricity companies also increased from 41% to 52%, although this was not significant due to the small samples.



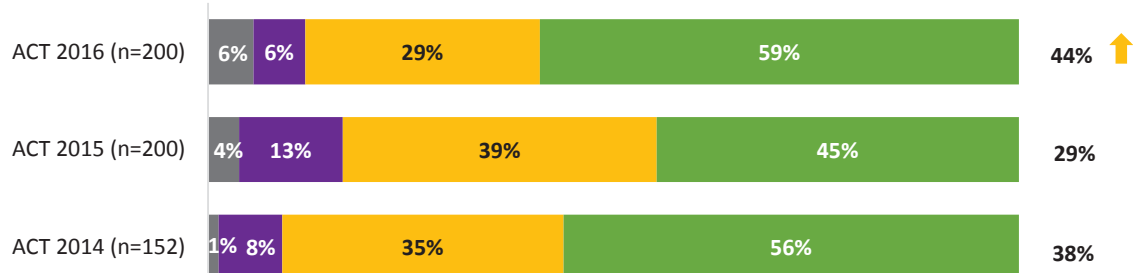
As shown in the chart over the page, among residential consumers, ratings of *overall value for money* with their electricity company have improved significantly: nett ratings of 8 or more out of 10 were up from 29% in 2015 to 44% in 2016, remaining slightly higher than the benchmark of 38% in 2014. When it comes to value for money from *gas* companies, ratings of 8 or more were also at their highest to date; from 29% in 2014 up somewhat to 36% in 2016.

Among *small business* consumers value for money ratings were also at their highest, with 40% giving their electricity company a rating of 8 or more vs. 28% in 2015 and 23% in 2014.

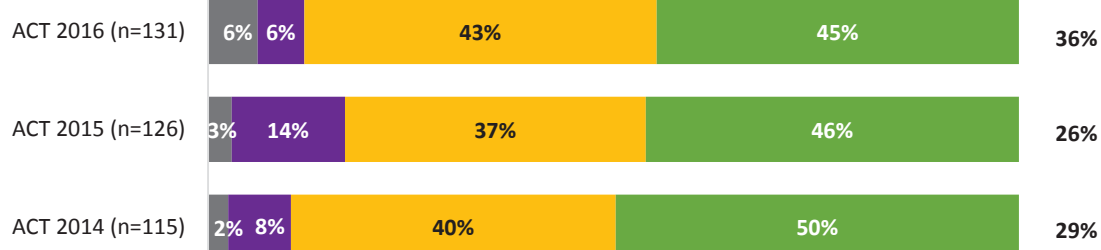
Ratings of Overall Value for Money Provided by Energy Company (Australian Capital Territory)

Residential Electricity Company

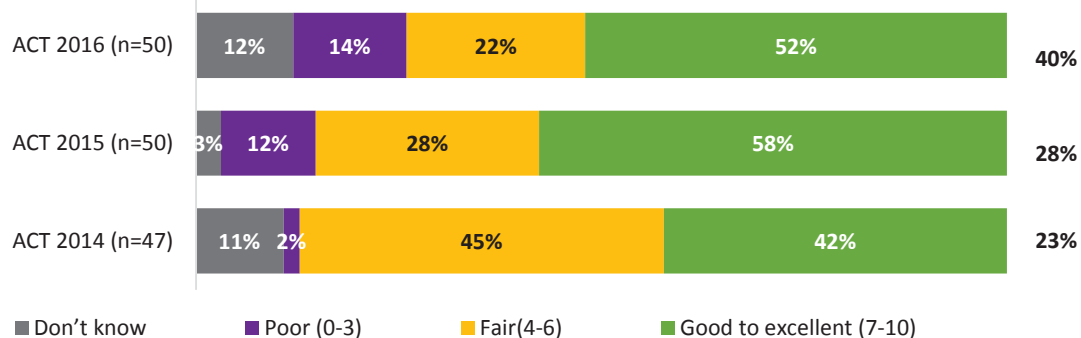
NETT
8+



Residential Gas Company



Business Electricity Company

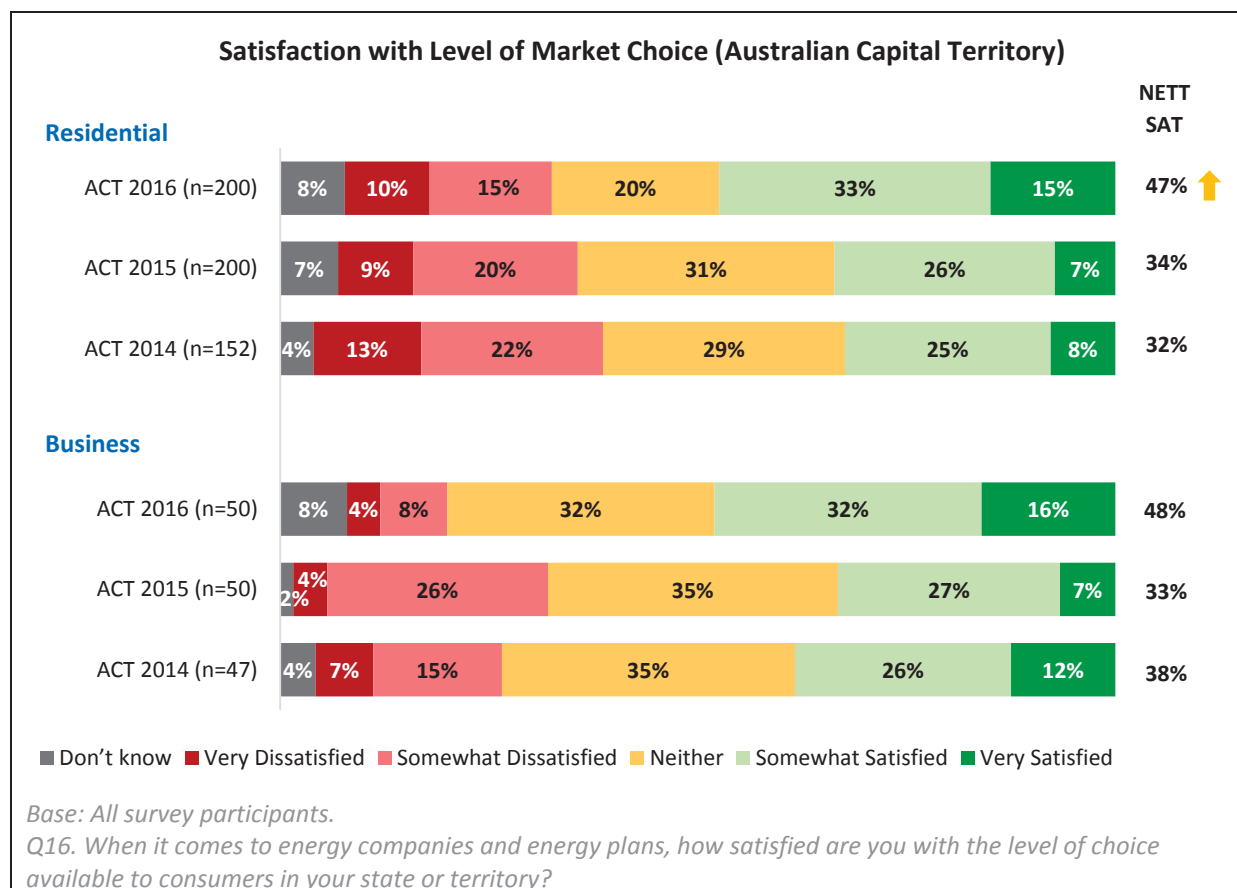


Base: All survey participants. NB: Business gas results not shown due to small sample size (n=11).
 Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your electricity company? Q9. And using that same scale again, how would you rate the overall value for money of the products and services provided by your gas company?

Satisfaction with the level of choice in the ACT energy market has increased

Participants were asked to indicate their satisfaction with the level of market choice available to consumers in the ACT. The results among residential consumers have showed a significant improvement, with 47% somewhat or very satisfied in 2016, up from 34% in 2015 and 32% in 2014.

Among small businesses there was also an improvement (though not statistically significant), following a slight decline in 2015, with nett satisfaction at 48%, compared with 38% in 2014 and 33% in 2015.



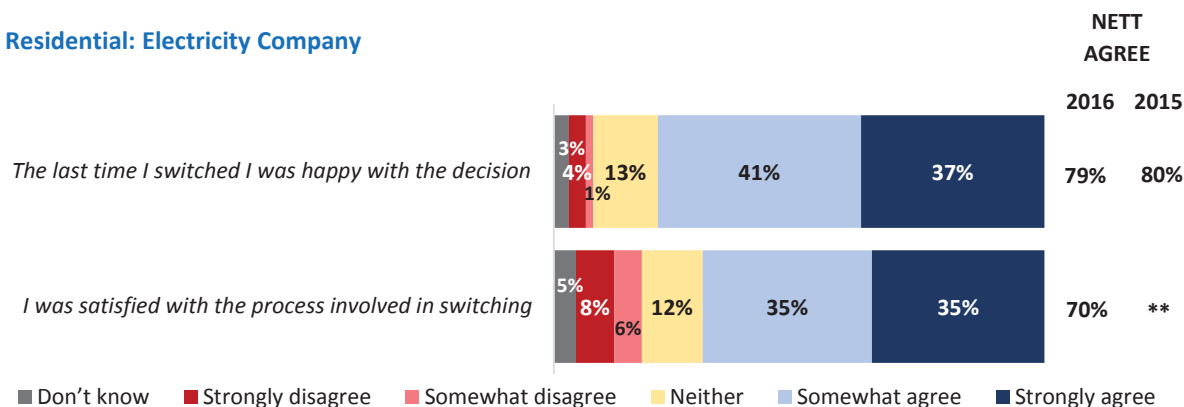
Most residential consumers who had switched their electricity company or plan were again happy with their decision and satisfied with the process involved

The attitudes of *consumers who had switched electricity company or plan* were explored through measuring agreement / disagreement levels with several statements.

As shown over the page, most residential switchers agreed with the statement in relation to their electricity company, *"The last time I switched, I was happy with the decision"* (79% agreed somewhat / strongly in 2016, consistent with 80% in 2015). The large majority also agreed with a new statement, *"I was satisfied with the process involved in switching"* (70%).

Satisfaction with Switching Energy Company (Australian Capital Territory)

Residential: Electricity Company



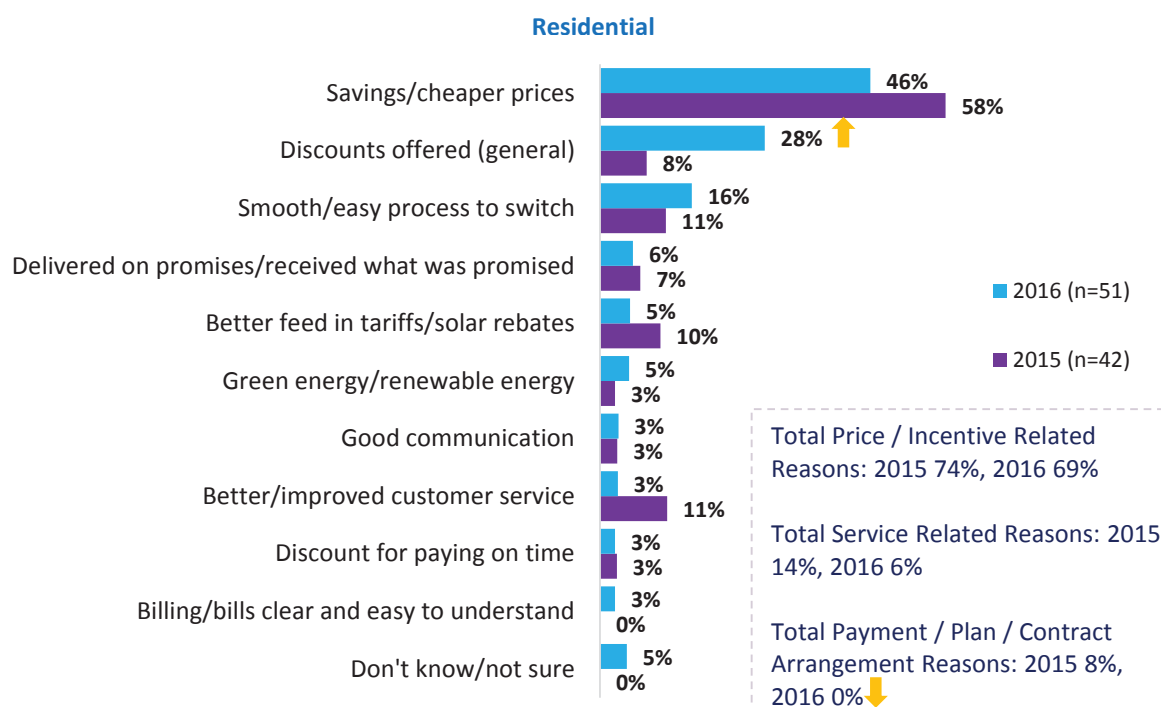
Base: Participants who had switched their electricity/gas company or plan (Residents - Electricity: 2015 n=54, 2016 n=63). Resident gas results (n=16) and Business results (n=1-8) not shown due to small sample sizes

NB: ** Question not asked in 2015.

Q50. And having switched your electricity company or plan, to what extent do you agree or disagree with the following? / Q55. And having switched your gas company or plan, to what extent do you agree or disagree with the following?

As shown below, residential consumers who were happy with their decision to switch electricity company were most likely to feel that way as a result of the savings and cheaper prices (46% unprompted), which is down slightly from 58% in 2015, while there was a significant increase in the proportion who were happy because of the discounts offered (up from 8% in 2015 to 28%).

Reasons for Being Happy with the Decision to Switch Electricity Company or Plan Unprompted (Australian Capital Territory), Top Mentions 2%+



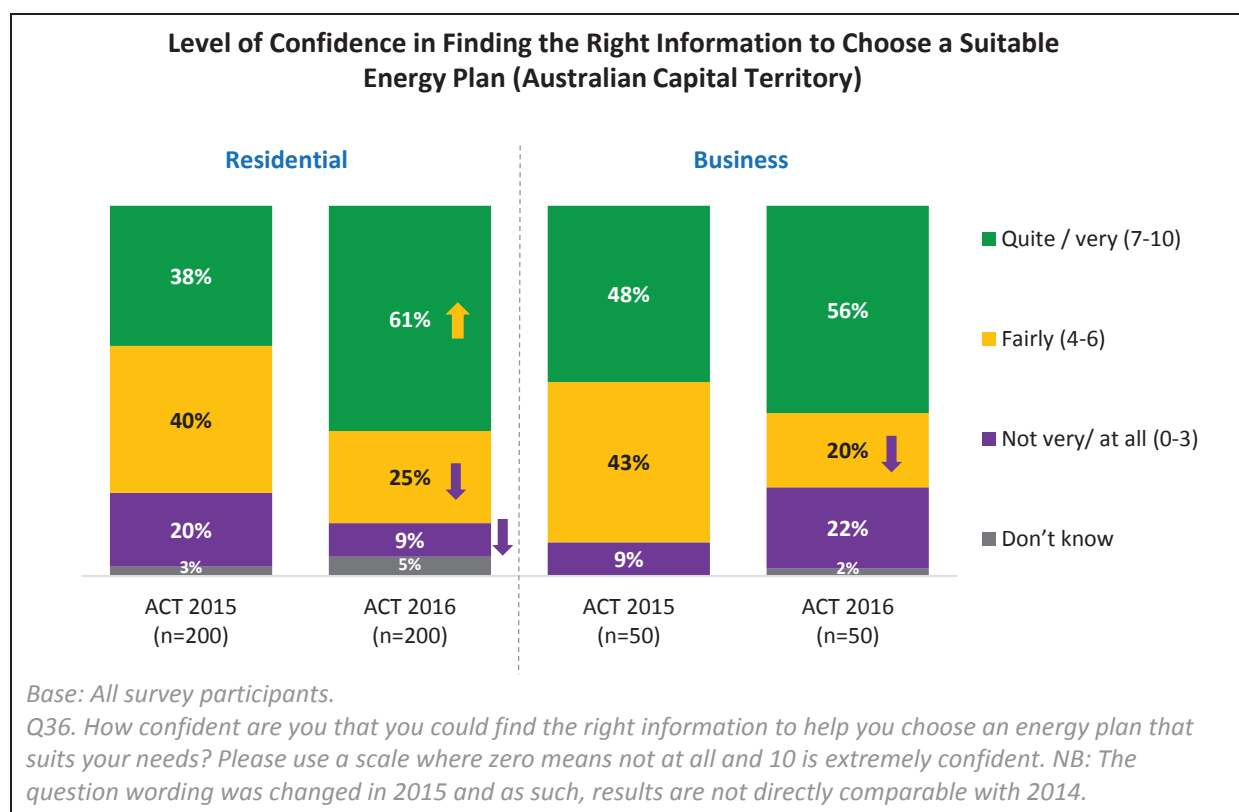
Base: Participants who agreed they were happy with their decision to switch electricity company or plan. NB Business results not shown due to small sample size (n=6).

Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE.

Residential consumers in the ACT were more confident in finding the right information to choose a suitable energy plan this year

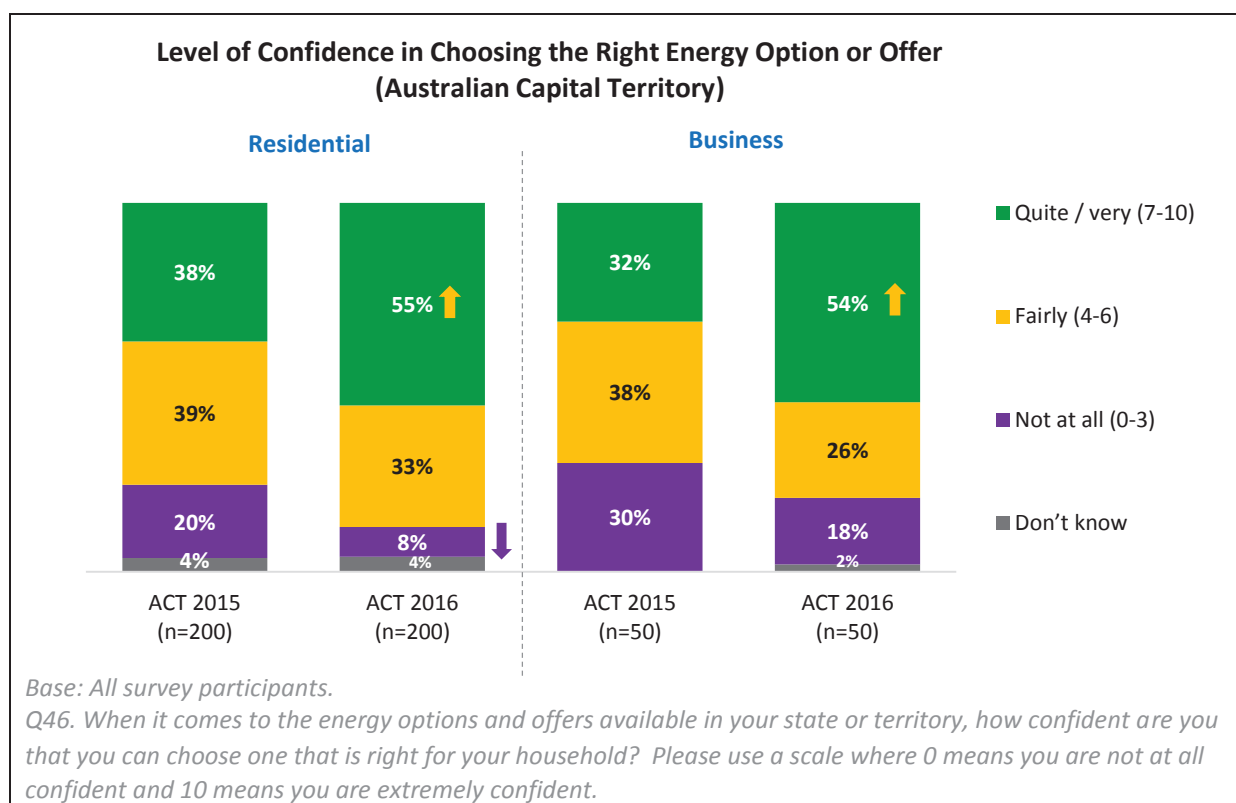
Confidence in finding the right information to choose a suitable energy plan increased among residential consumers in 2016, with almost two thirds (61%) giving themselves a high confidence rating of 7 or more out of 10, which is up significantly from 38% in 2015.

Meanwhile confidence became more divided among business consumers this year. While 56% rated their confidence at 7 or above, up slightly from 48% in 2015, there was a significant increase in those who said they were not really confident, with a rating of 0 – 3 (nett 22%, up from 9% in 2015).



In terms of confidence in actually choosing the right energy option, both residential and business consumers in the ACT were more confident this year

More than half of residential (55%) and business consumers (54%) were highly confident they could choose the right energy option for their household, which is significantly higher for both segments than in 2015 (38% and 32%, respectively), as shown over the page.



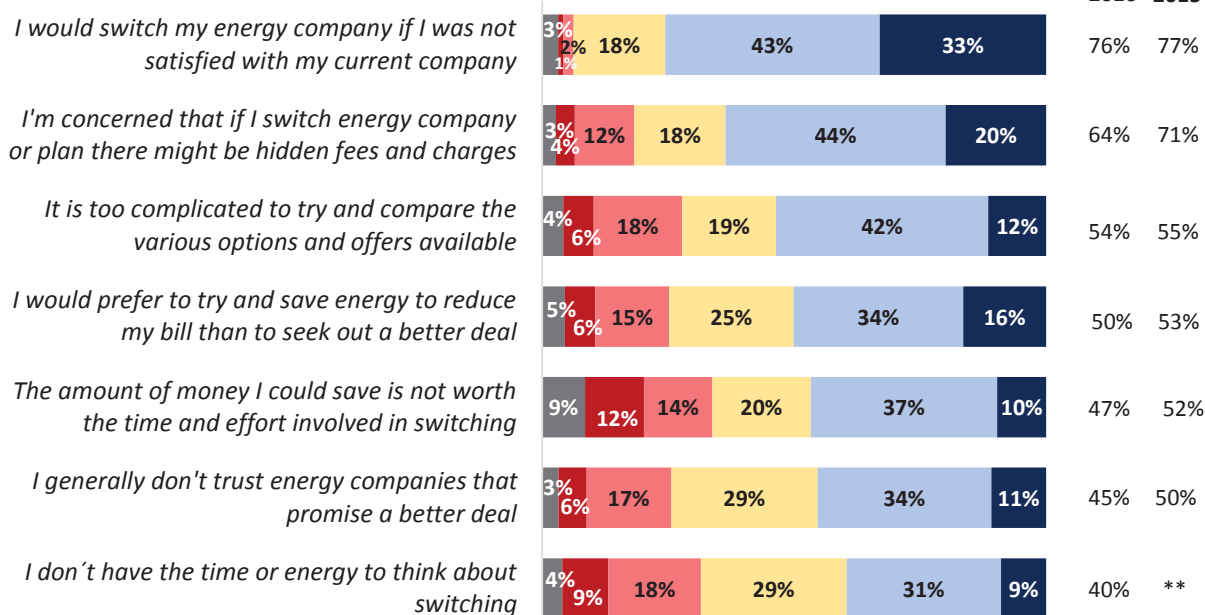
Perhaps explaining the relative inertia the majority maintained they would switch if they were not happy with their current company but were concerned about hidden fees if they did switch

To further understand market outcomes and consumer sentiment, participants were asked the extent to which they agreed or disagreed with several statements regarding switching.

The strongest agreement levels were in line with 2015 findings for the statements: *I would switch my energy company if I was not satisfied with my current company* (residential: 76%, small businesses: 78%) and *I'm concerned that if I switch there will be hidden fees and charges* (residential: 64%, small businesses: 60%).

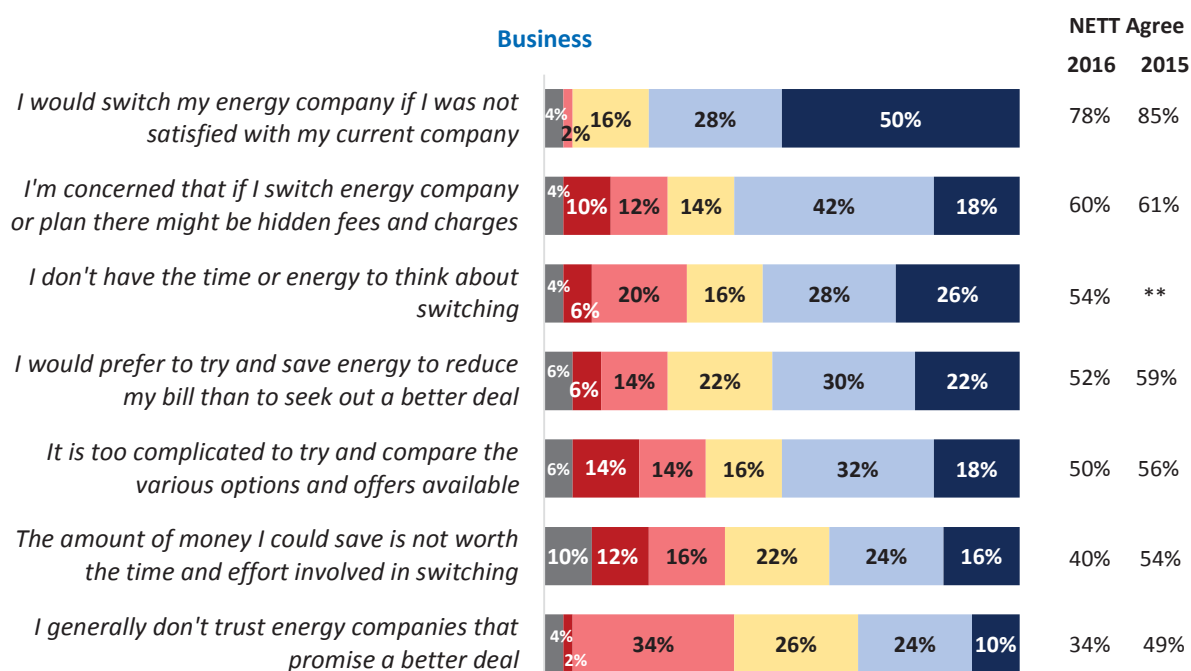
Attitudes to Switching (Australian Capital Territory)

Residential



■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly Agree

Business



Base: All survey participants (Residential: 2015 n=200, 2016 n=200; Business: (2015 n=50, 2016 n=50). NB: ** Question not asked in 2015.

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...



VICTORIA

5 Victoria

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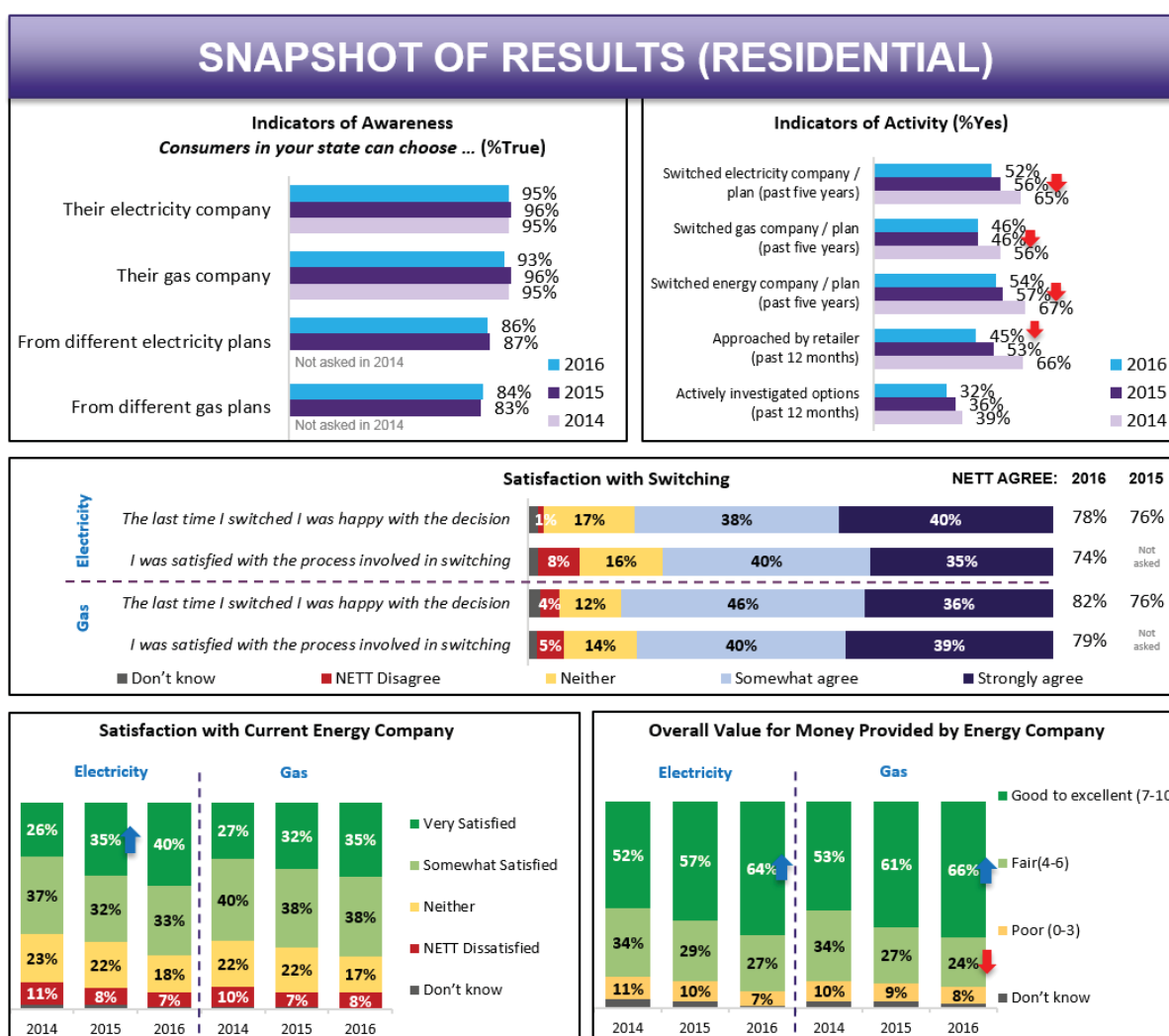
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5.1 Snapshot of Results

Awareness of the ability to choose different companies and offers in the Victorian energy market remains very high. Confidence is building, with more consumers feeling confident they can find the right information about energy offers and deals, and choose the right one for them – i.e. 66% of residential consumers and 62% of small business consumers rated their confidence in choosing the right option as 7 or more out of 10. Despite this confidence, awareness of comparator websites remains low, especially for the Victorian Government’s comparator sites e.g. among residential consumers unprompted awareness was at 0%, and with prompting at just 23%. General internet-based information sources were widely considered the most useful for investigating offers and options among both switchers and non-switchers.

While switching rates in the past five years across energy companies and plans have declined in Victoria, as has the incidence of direct approaches from retailers, levels remain higher than in all other NEM jurisdictions. Satisfaction remains quite high among Victorians who had switched electricity company, with most also agreeing somewhat or strongly that the last time they switched they were happy with the decision (78% of residential switchers and 81% of small businesses).

Around half of those surveyed were again either seeking or interested in seeking a better deal. In line with 2015 results, most consumers agreed they would switch if they were not satisfied with their current company (78% of residential consumers and 82% of small businesses surveyed). Notably, there was a decline in the proportion of residential consumers who agreed that they *generally don’t trust energy companies that promise a better deal* (50% in 2016 vs. 59% in 2015), or that they *would rather save energy to reduce energy bills than seek out a better deal* (43% vs. 51%).



5.2 Key Findings

5.2.1 Consumer Activity

Introduction

This section of the report details findings about Victorian consumers’:

- Awareness and knowledge of their options in energy markets;
- Incidence and time spent investigating energy deals and offers in the last year;
- Reasons for *not* investigating different offers and options;
- Reported ease of comparing different offers and options;
- Used and preferred information sources for investigating different offers and options;
- Awareness of comparison websites – unprompted and prompted;
- Rates of switching energy company, plan and/or deal and the incidence of sales approaches from energy companies;
- Reasons for consumers not switching energy company or plan after investigating options;
- Drivers: unprompted motivations and the level of importance of various factors in the decision to switch company/plan, and dollar savings needed for consumers to seriously consider switching; and
- Current behaviours – whether currently looking or interested in seeking a better deal.

The Results

Most Victorian consumers know they can choose their own energy company or plan, and that they have a choice between different energy offers and plans

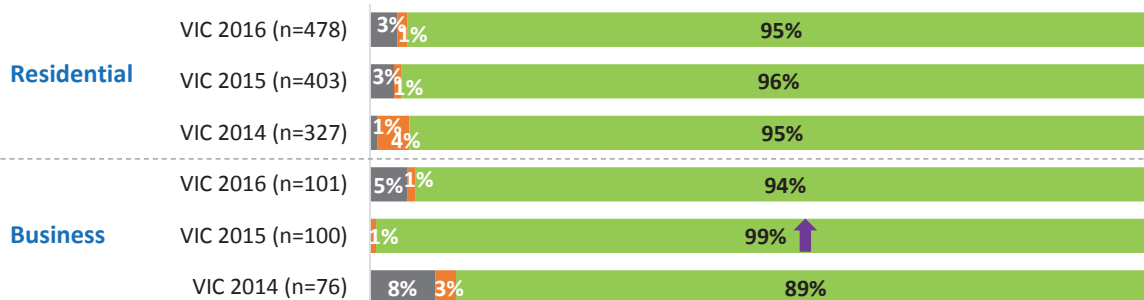
As charted on the following pages, largely consistent with 2014 and 2015 the vast majority of consumers surveyed in Victoria were aware they could choose their *electricity* company: 95% of residential consumers and 94% of small businesses, or their *gas* company (93% and 94% respectively).

Awareness of the option to choose different energy plans, price structures, contract lengths and terms remained stable among residential consumers against the 2015 results (86% of electricity consumers and 84% of gas consumers in 2016).

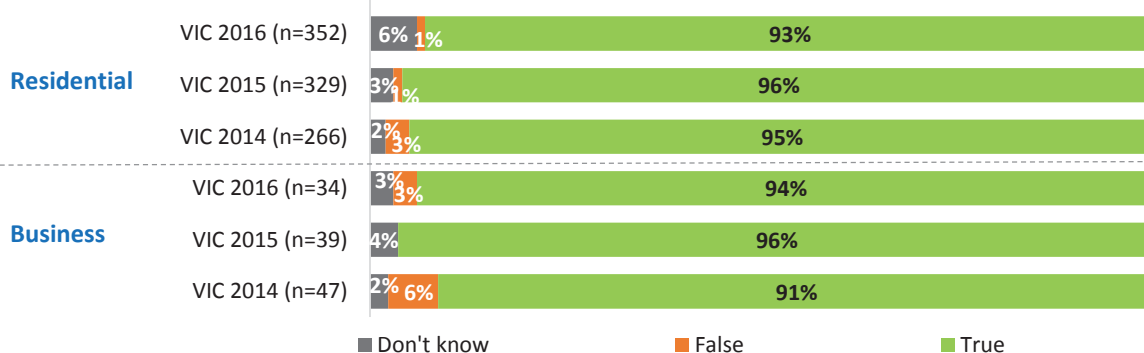
Among business consumers, awareness of these options declined slightly from 2015 although this was not statistically significant – i.e. from 88% in 2015 to 82% in 2016 among electricity consumers and from 87% down to 74% among gas consumers.

Awareness of Ability to Choose Energy Company (Victoria)

Consumers can choose their electricity company



Consumers can choose their gas company



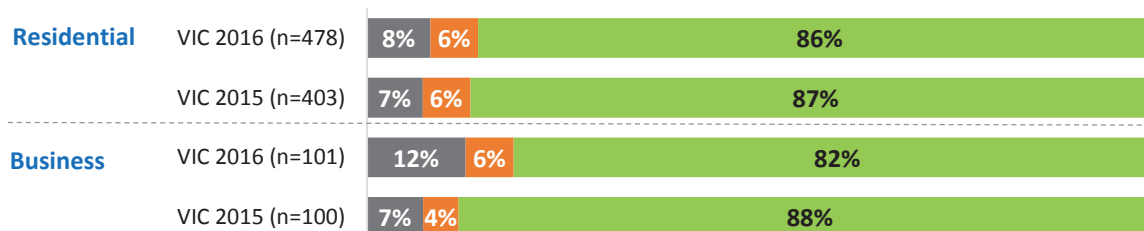
■ Don't know ■ False ■ True

Base: All survey participants.

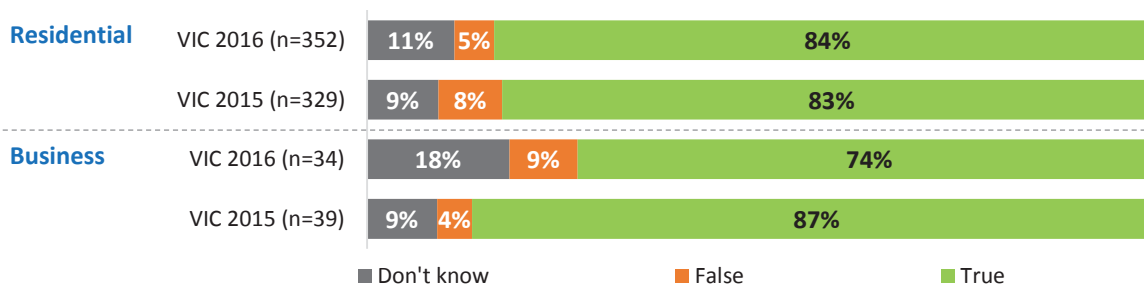
Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state can choose their electricity company. b) Consumers in your state can choose their gas company.

Awareness of Ability to Choose From Different Energy Plans, Offers Etc. (Victoria)

Consumers can choose their electricity plans and options



Consumers can choose their gas plans and options



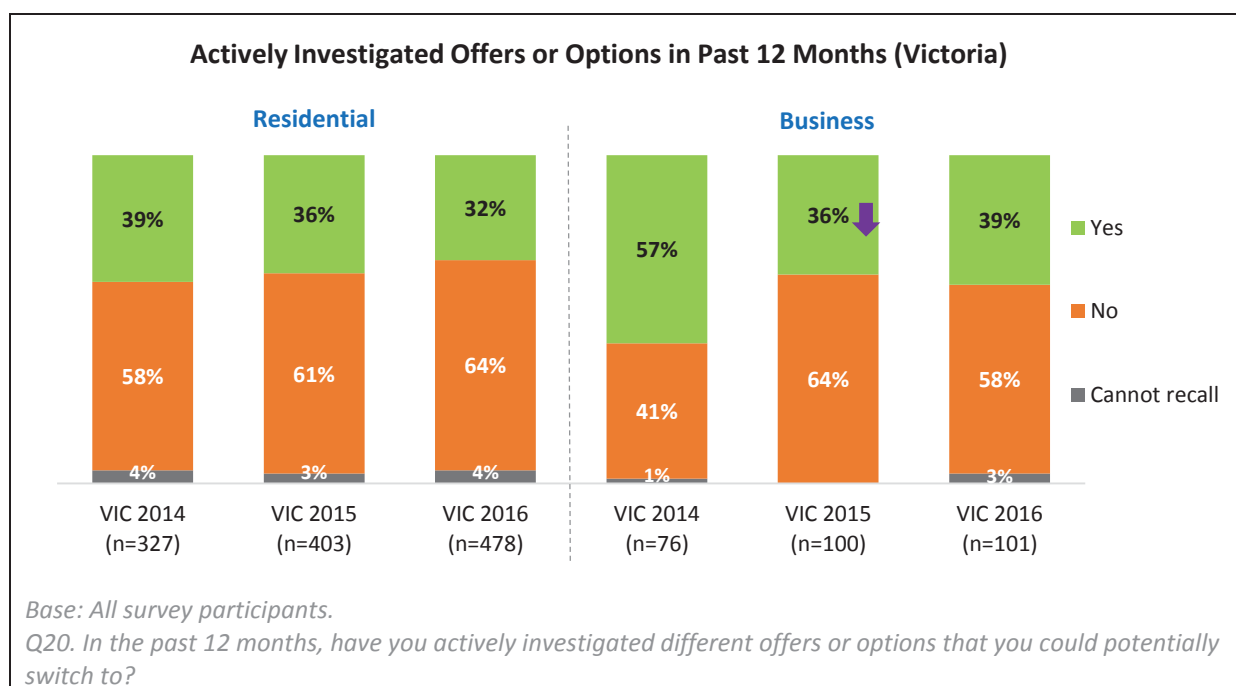
■ Don't know ■ False ■ True

Base: All survey participants.

Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state can choose from a range of different types of electricity plans, price structures, contract lengths and terms. d) Consumers in your state 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.

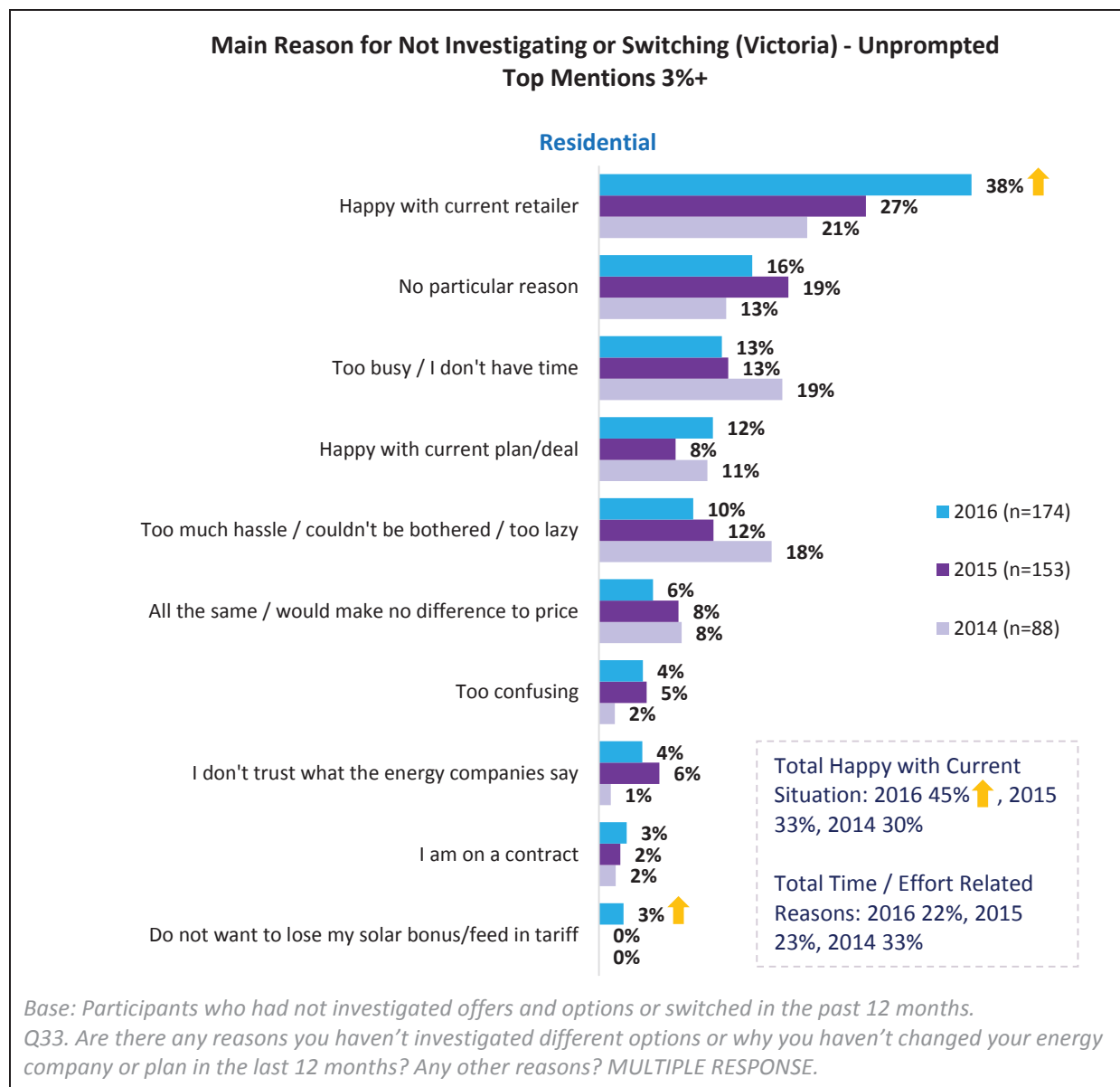
Around a third of consumers had actively investigated offers or options, with the majority spending no more than two hours doing so

In line with 2015 results, around a third of residential consumers (32%) and slightly more small business consumers (39%) had actively investigated offers or options that they could potentially switch to in the past 12 months. Although not statistically significant, there is a declining trend among residential consumers investigating their options over time, while the result among businesses (39%) remains significantly lower than in the benchmark year in 2014 (57%).



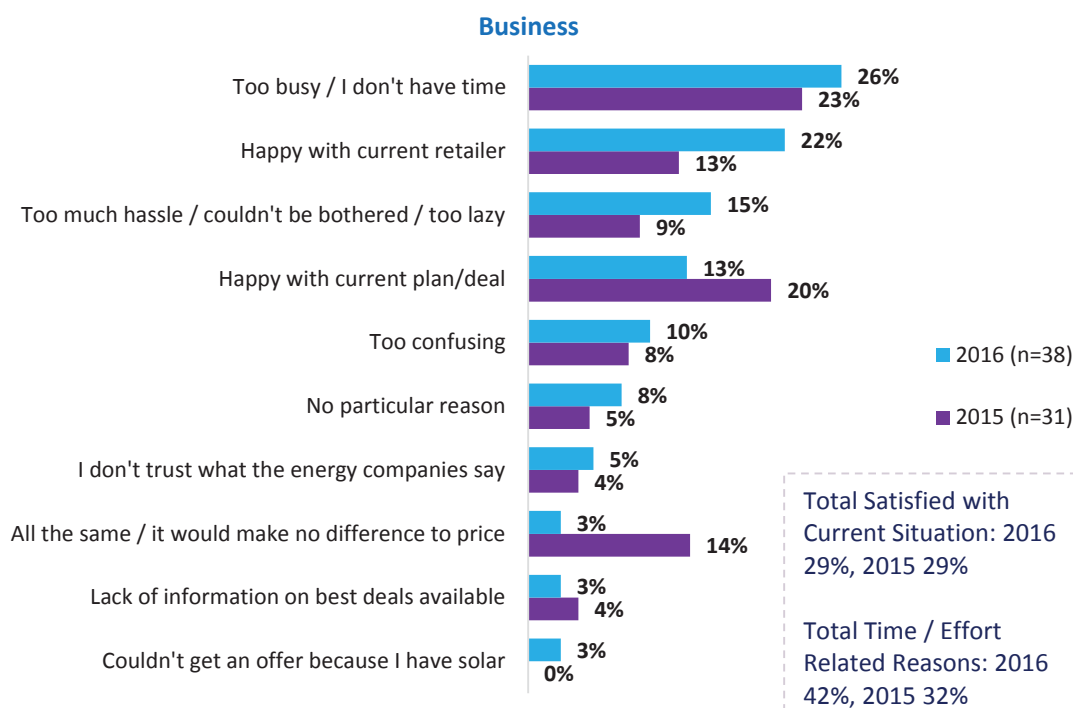
The most common reason for consumers not to have investigated their options was again satisfaction with their current retailer or arrangements, and this grew in prevalence in 2016

As shown below, among residential consumers who had not investigated options or switched provider or plan, the main unprompted (and subsequently manually coded) reasons were similar to previous years. Most notably, they were happy with their current retailer, at 38% which is significantly higher than in 2014. Secondary reasons included being too busy (13%) and happy with their current plan (12%). Mentions of it being too much of a hassle / 'couldn't be bothered' were down from the benchmark (falling from 18% in 2014 to 10% in this review).



Among business consumers who had neither investigated options nor switched provider or plan, the main reasons given were that they were too busy (26%), happy with their current retailer (22%) or plan (13%), and/or it was too much of a hassle / 'couldn't be bothered' (15%).

Main Reason for Not Investigating or Switching (Victoria) - Unprompted Top Mentions 3%+

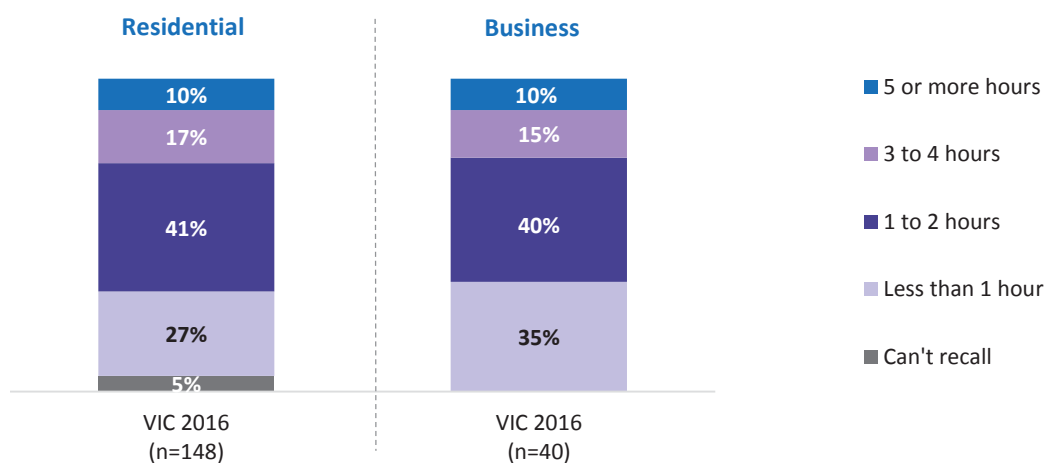


Base: Participants who had not investigated offers and options or switched in the past 12 months. NB: 2014 results not shown due to small sample size (n=9).

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? MULTIPLE RESPONSE.

The majority of consumers who *did* investigate energy offers and options estimated that they spent no more than two hours investigating different options and offers they could switch to (69% of residential consumers and 75% of business consumers who looked into their options). By comparison, just one in ten (10%) spent five or more hours doing so.

Time Spent Investigating Offers or Options (Victoria)



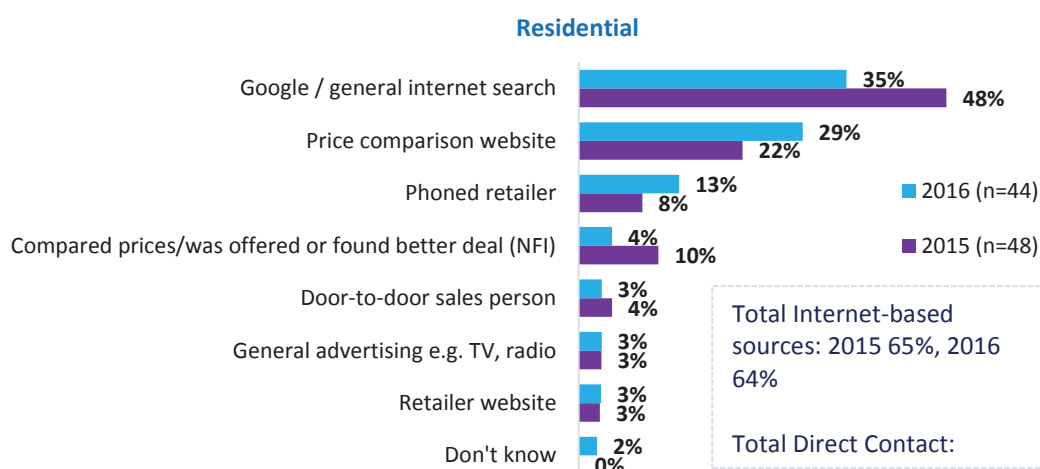
Base: Participants who investigated switching. NB: Question not asked in 2014 or 2015.

Q20b. The last time you investigated energy offers or options, how long did it take you to do this?

Among residential consumers *who investigated but did not go on to switch*, the main information sources used included Google or other general internet-based searches (35% vs. 48% in 2015), price comparison websites (29% vs. 22%) and telephoning retailers (13% vs. 8%).

Those who had investigated but not switched were then asked what the *most useful* information sources were for helping them to decide what they would do. Again these were Google or other internet-based searching (32% vs. 21% in 2015), price comparison websites (14% vs. 8% in 2015) and phoning a retailer directly (5% vs. 4% in 2015). Whilst there was a statistically significant increase in incidence of participants *not finding any information sources useful* (22% up from 3% in 2015), the sample size potentially inflates the importance of this change and actually represents just n=10 respondents in 2016 and n=2 respondents in 2015.

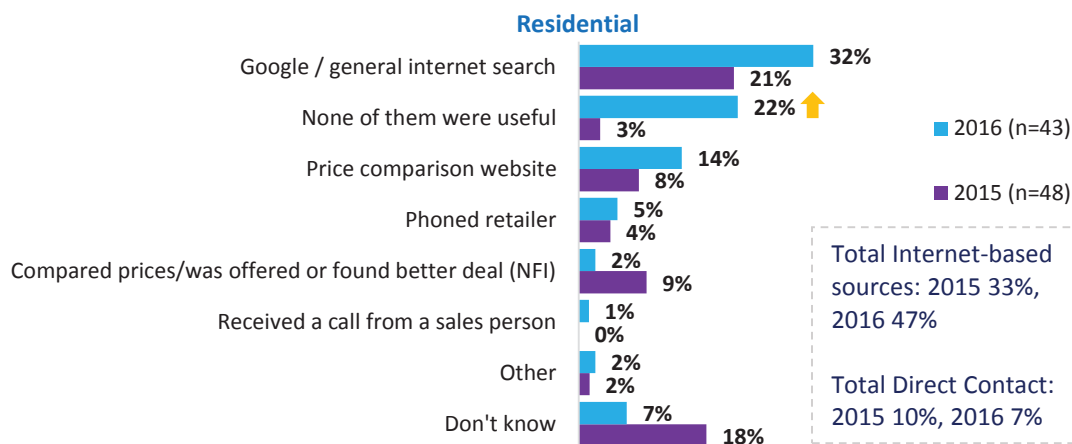
Main Information Sources Used to Investigate Different Offers and Options (Victoria) Unprompted



Base: Participants who had investigated offers or options but had not switched. NB: 2014 results not shown due to small sample size (n=12). Business results not shown due to small sample size: 2016 (n=17).

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.

Most Useful Information Source Used to Help Decide Whether or Not to Switch (Victoria) - Unprompted



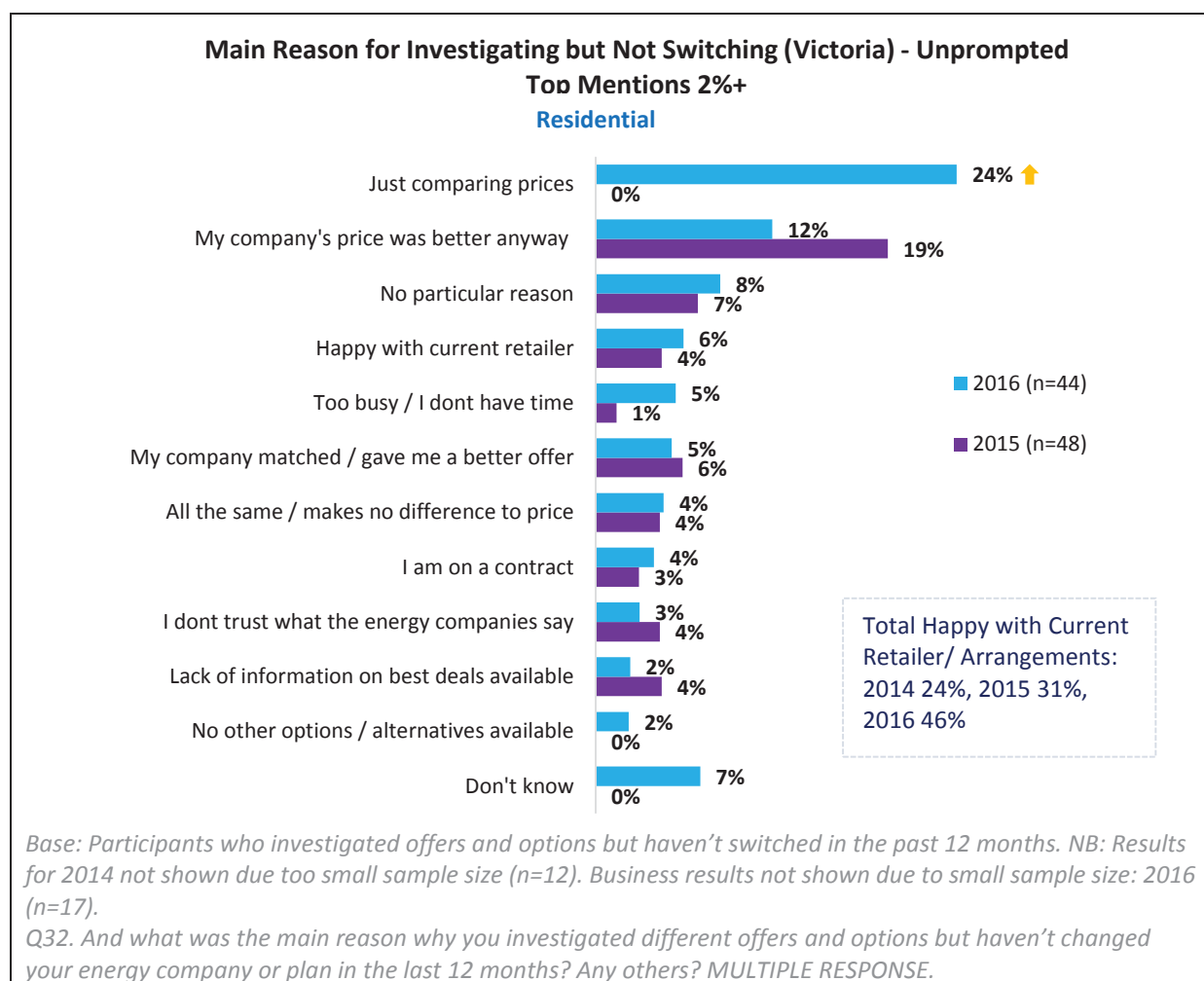
Base: Participants who had investigated offers or options but had not switched. NB: Question not asked in 2014. Business results not shown due to small sample size: 2016 (n=17).

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.

Lack of value proposition was the main reason for investigating but not switching – more price checking is evident

Among residential customers, the main reason provided for *not switching despite investigating* in the past 12 months was ‘just comparing prices’ (24%), with no further information given. While this is statistically significant, the small sample size potentially inflates the importance of this change and actually represents just n=7 participants. In previous years, as the incidence was low, mentions within this theme were included in ‘other responses’.

There were no significant changes in secondary reasons, which included finding that their own company had a better price after all (12% in 2016, although down from 19% in 2015) or was able to match the offer (5%), along with being happy with the current retailer (6%).

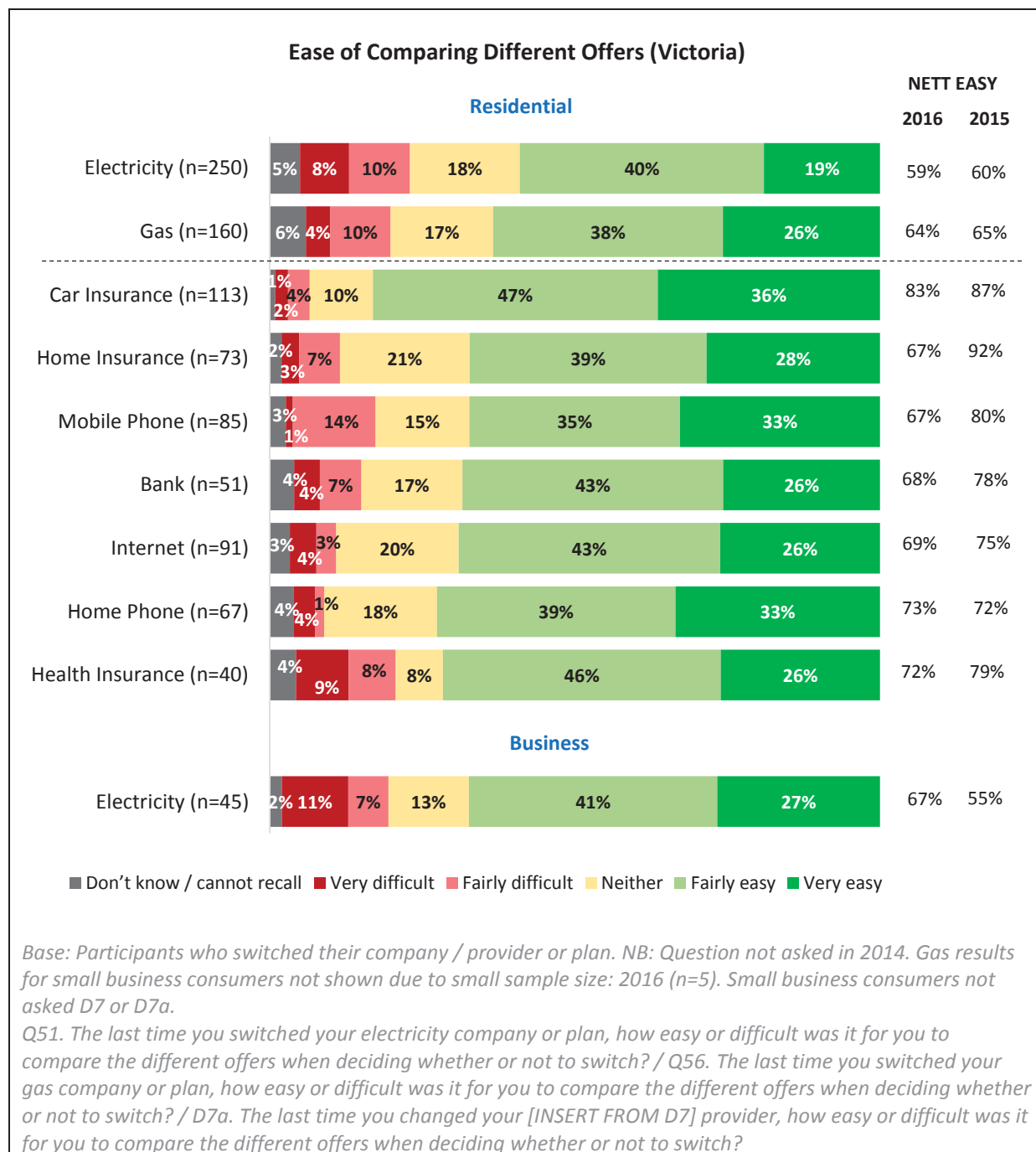


In line with 2015 results, the majority of consumers found comparing offers and options easy

Those who had switched electricity or gas company or plan in the last five years were asked how easy or difficult it was to compare the different offers. Consistent with 2015 results when the question was first added, three in five residential consumers found it fairly or very easy to compare electricity offers and options (59% in 2016, 60% in 2015). For gas, almost two thirds again rated the ease of switching their gas provider or plan as fairly or very easy (64% vs. 65% in 2015).

As in 2015, Victorian residential consumers found it more difficult to compare energy offers than options for other services such as car insurance (83% found it easy in 2016), home phone (73%) and health insurance (72%).

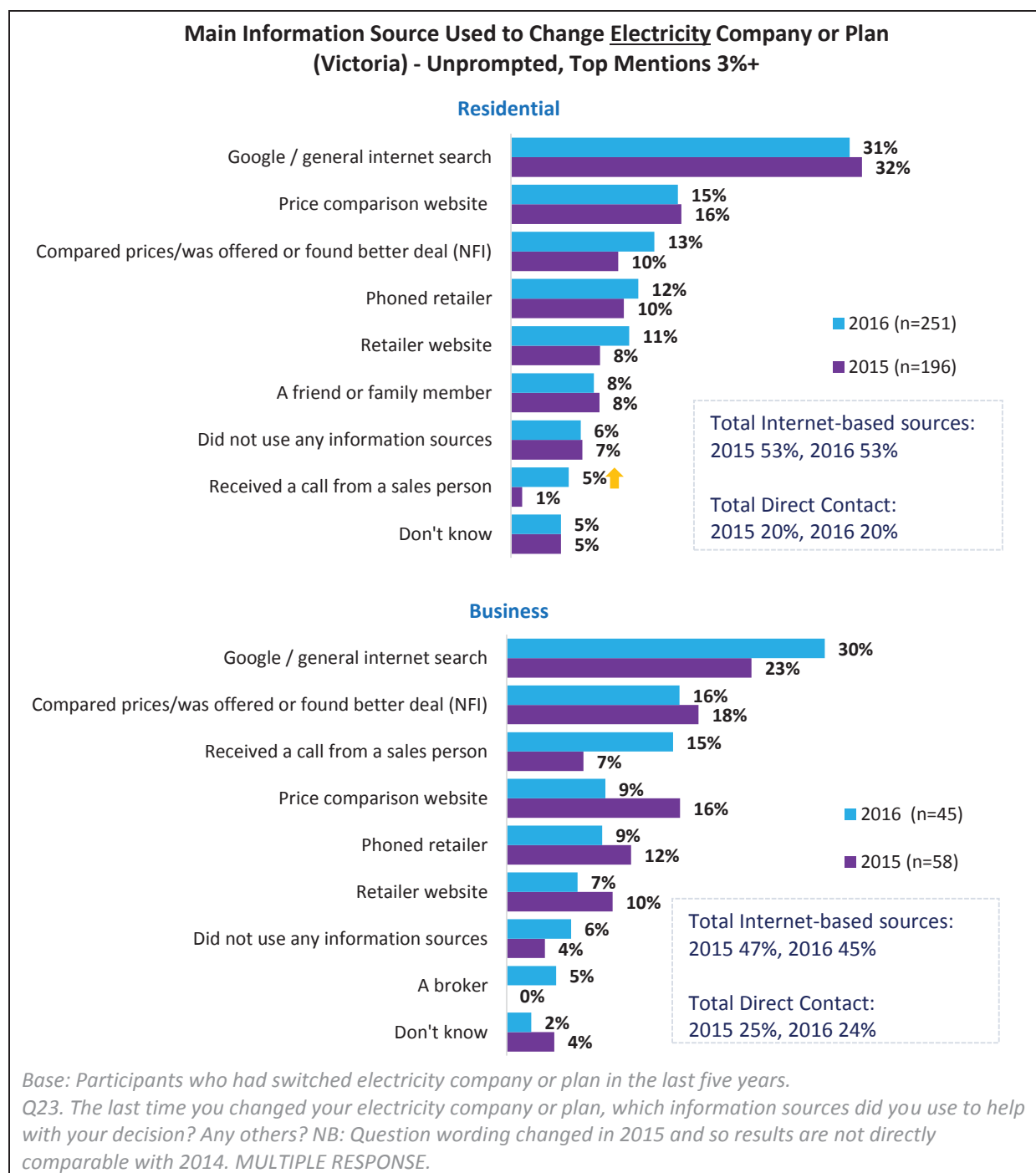
Whilst not a significant difference, the ease of comparing electricity offers and options among business consumers improved from 55% in 2015 to 67% in 2016.



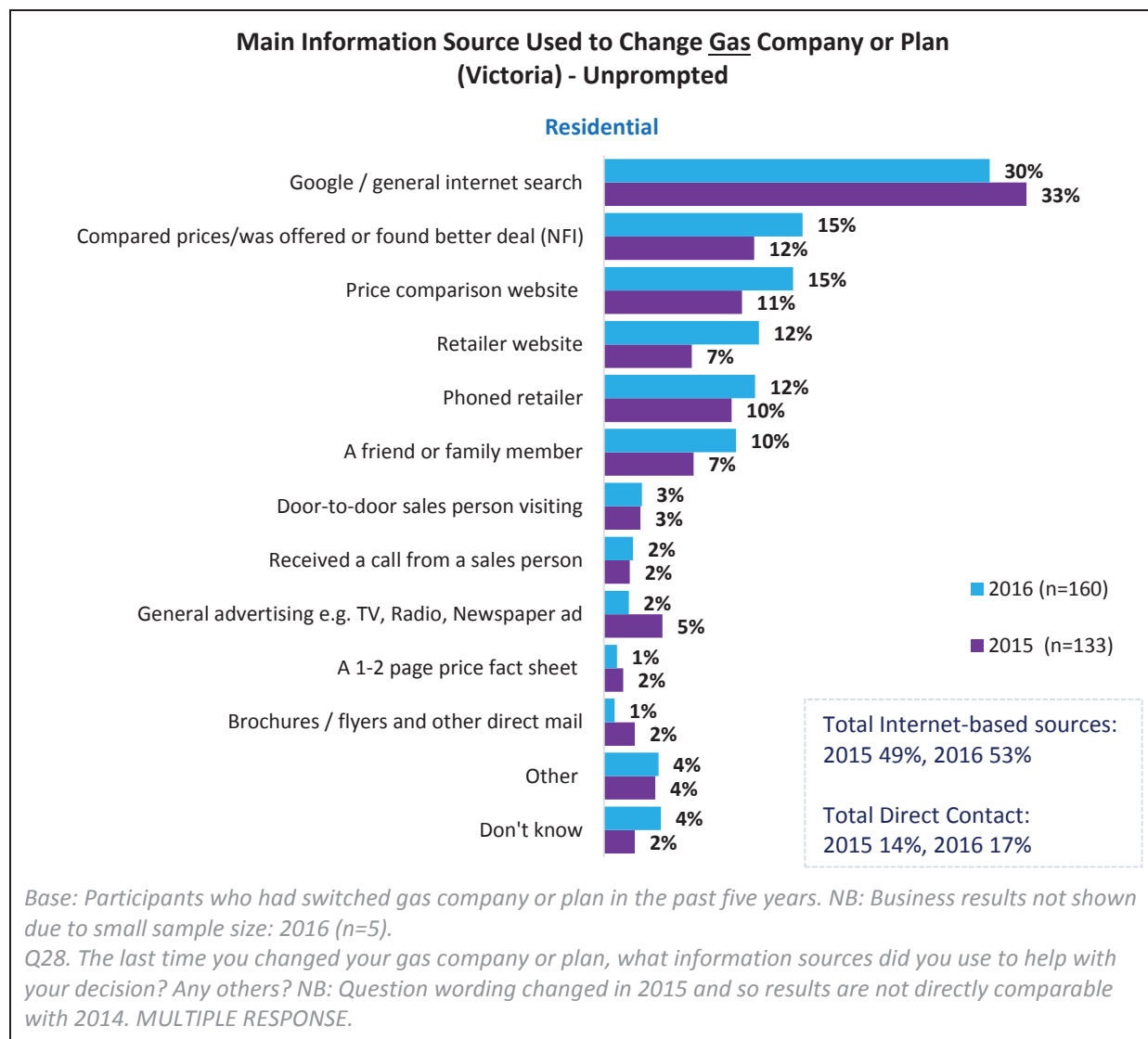
The internet remained the most used information source to help consumers decide to switch

Among residential consumers who had switched energy company or plan, there were no significant changes in the main information sources used to help them do so; again these were Google / internet-based searches (31%), using a price comparison website (15%), comparing prices or being offered a better deal (12%) and visiting retailer websites (11%). Notably, there was a significant increase in the proportion of residential consumers who mentioned receiving a call from a sales person although this remained at very low levels: 5%, up from 1% in 2015. While not a significant difference, the same was true of business consumers (15% vs. 7% respectively).

The top source among business consumers was also Google / internet searches (30%, up from 23% in 2015).



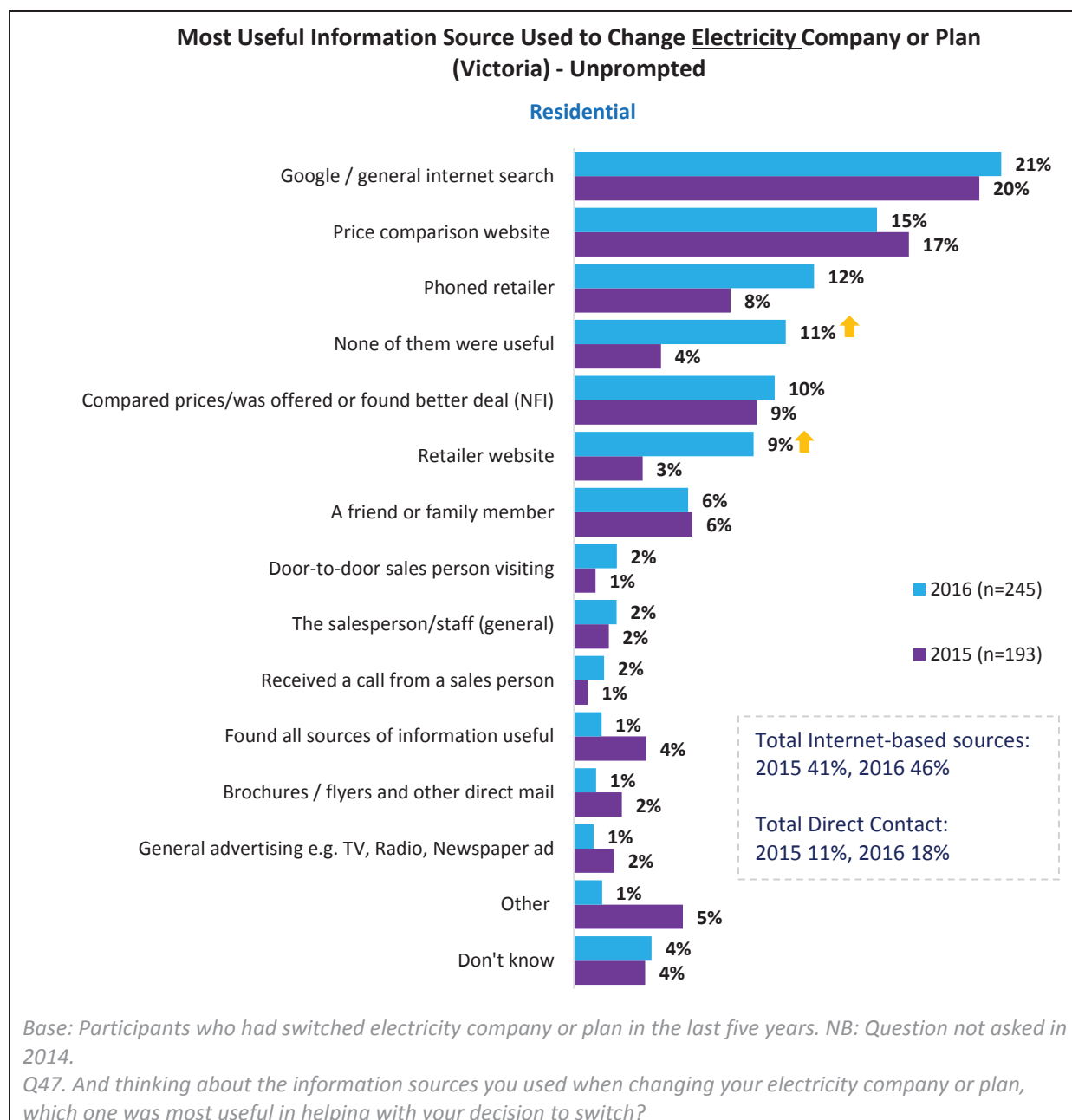
Among residential consumers who had switched gas company or plan, there were no major changes in the information sources. The top mention was again Google or another internet-based search (30% in 2016 vs. 33% in 2015), while some simply compared prices or found a better deal without stating a specific source (15% vs. 12%), and some used a price comparison website (15% vs. 11%) or retailer websites (12% vs. 7%).



Among switchers, internet-based sources were not only the most popular but also the most useful

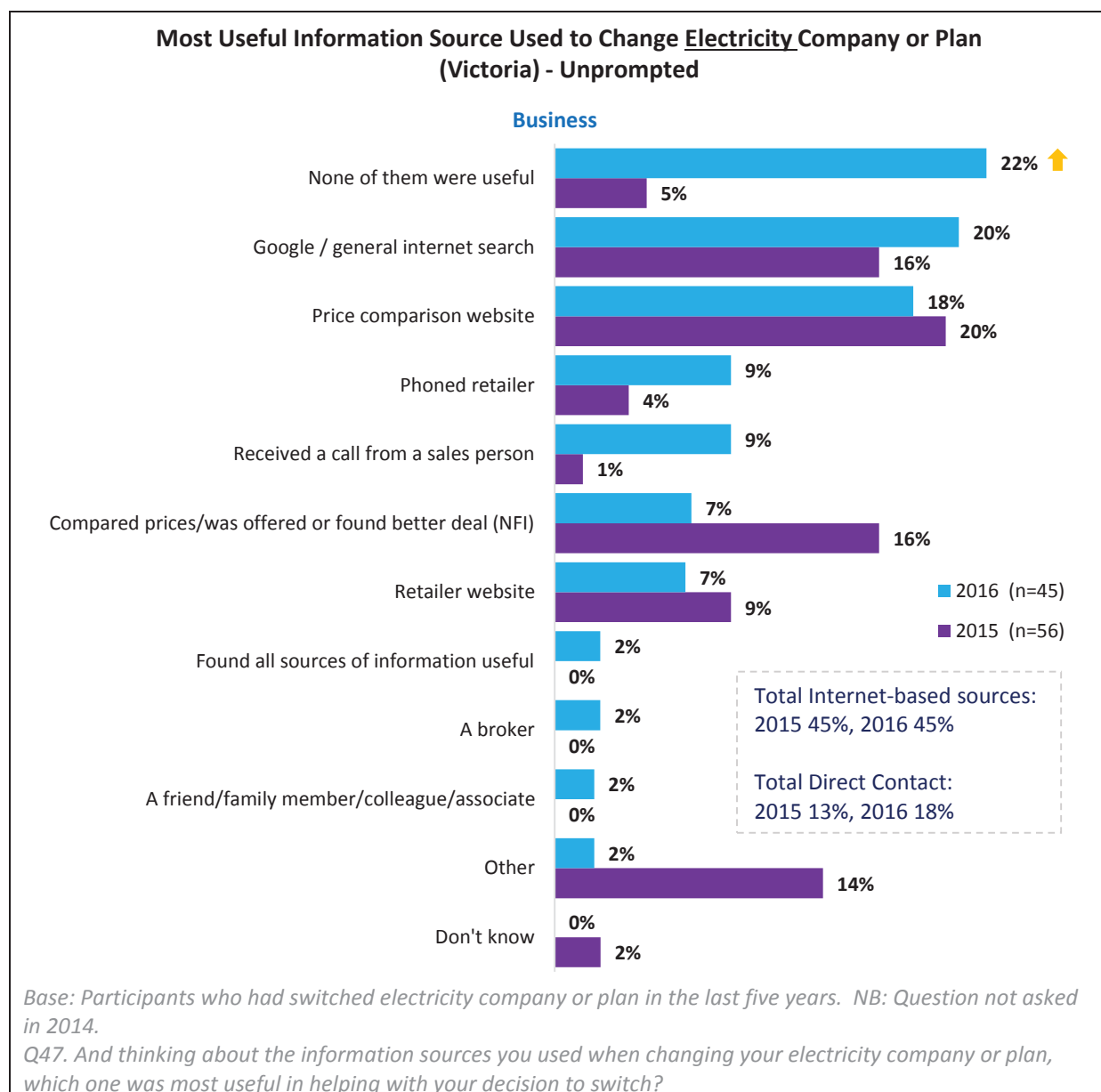
Consumers who had switched an energy company or plan were asked which information source they thought was *most useful*.

For *residential* consumers who had switched electricity company or plan, internet-based sources were again regarded as the most useful (nett 46% in 2016 vs. 41% in 2015). Other useful sources included price comparison websites (15% vs. 17%) and phoning retailers (12% vs. 8%). There was a significant increase in the number of residential consumers who found retailer websites the most useful source of information (9% vs. 3%), while there was also a higher proportion who found *no* information sources useful in switching (11% vs. 4%).

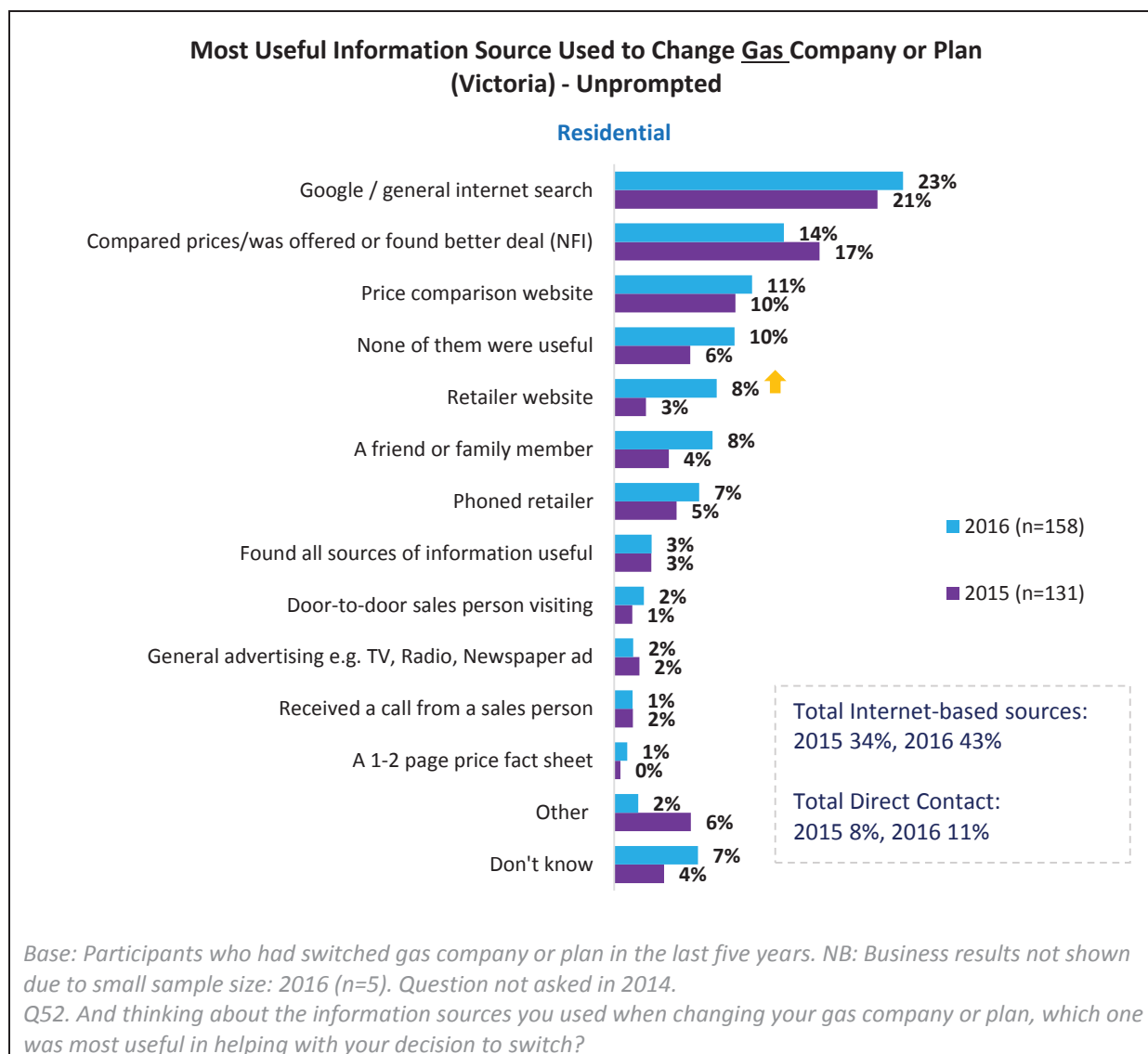


As shown below, the most common response for business consumers who had switched electricity company or plan was that *no* information sources were useful. This result was significantly higher when compared to 2015 (22% vs. 5%).

The most useful sources for business consumers included Google or internet-based searches (20% vs. 16%) and price comparison websites (18% vs. 20%).



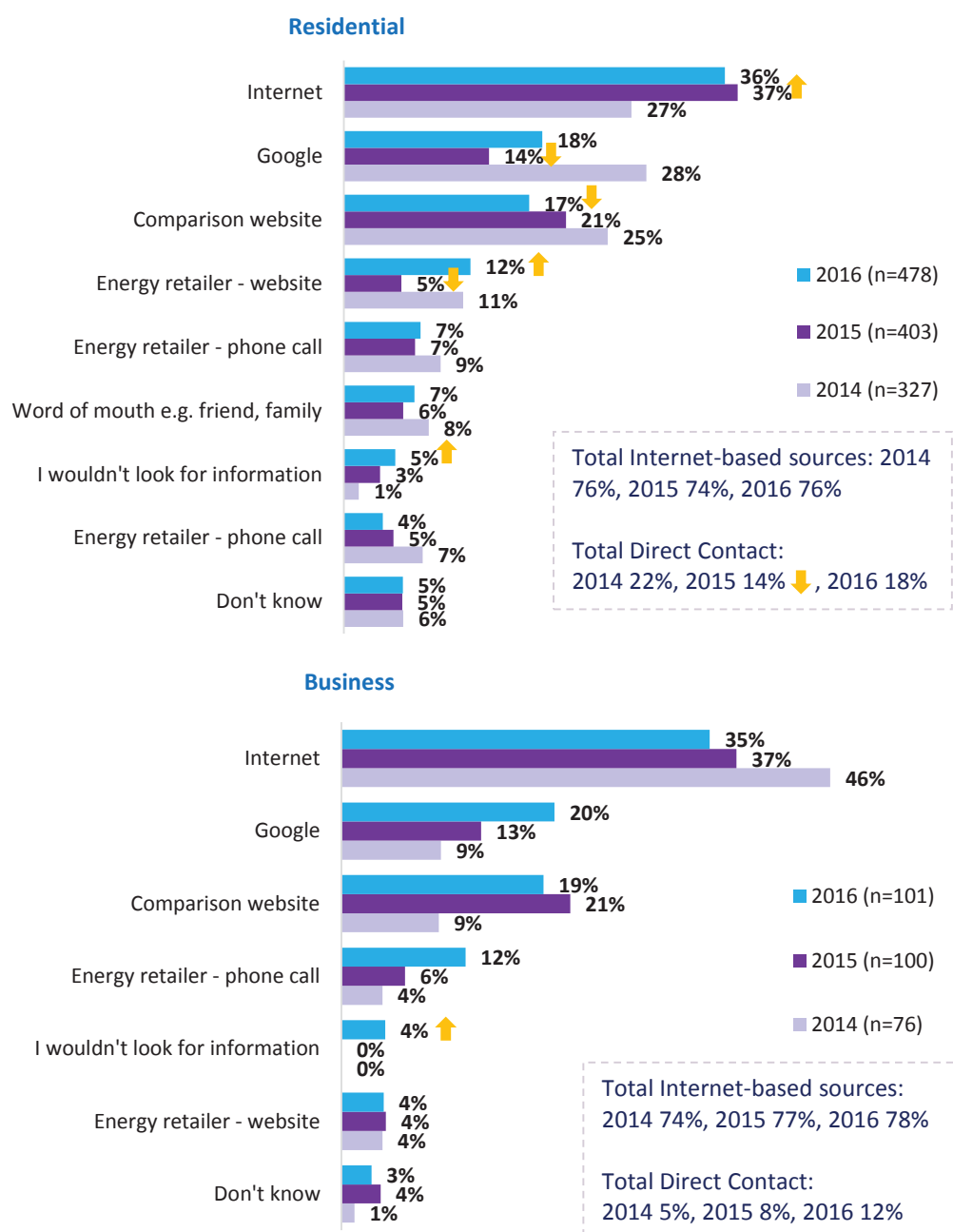
Shown below, the *most useful* information sources among residential consumers for switching gas company or plan were again a Google or internet-based search (23% vs. 21%), looking at the best price or saving (14% vs. 17%) and/or using a price comparison website (11% vs. 10%). As with electricity, there was also a slight increase in mentions that *no* information sources were useful when deciding to switching gas (10% vs. 6%). Mentions of visiting a retailer's website were significantly higher in 2016, at 8% vs. 3% in 2015.



Internet sources remain the standout most preferred for information about energy offers among the large majority of consumers

All participants were asked what information source they would most prefer to use if they wanted to look for information about different energy retailers or plans. As shown in the chart over the page, year-on-year the most preferred information source for roughly three quarters of all consumers was generically '*the internet*': i.e. among residential consumers nett 73% in 2016, 72% in 2015 and 74% in 2014, and among business consumers 78%, 77% and 74% respectively.

Preferred Information Source for Information about Different Retailers or Plans (Victoria) - Unprompted, Top Mentions 3%+



Base: All survey participants.

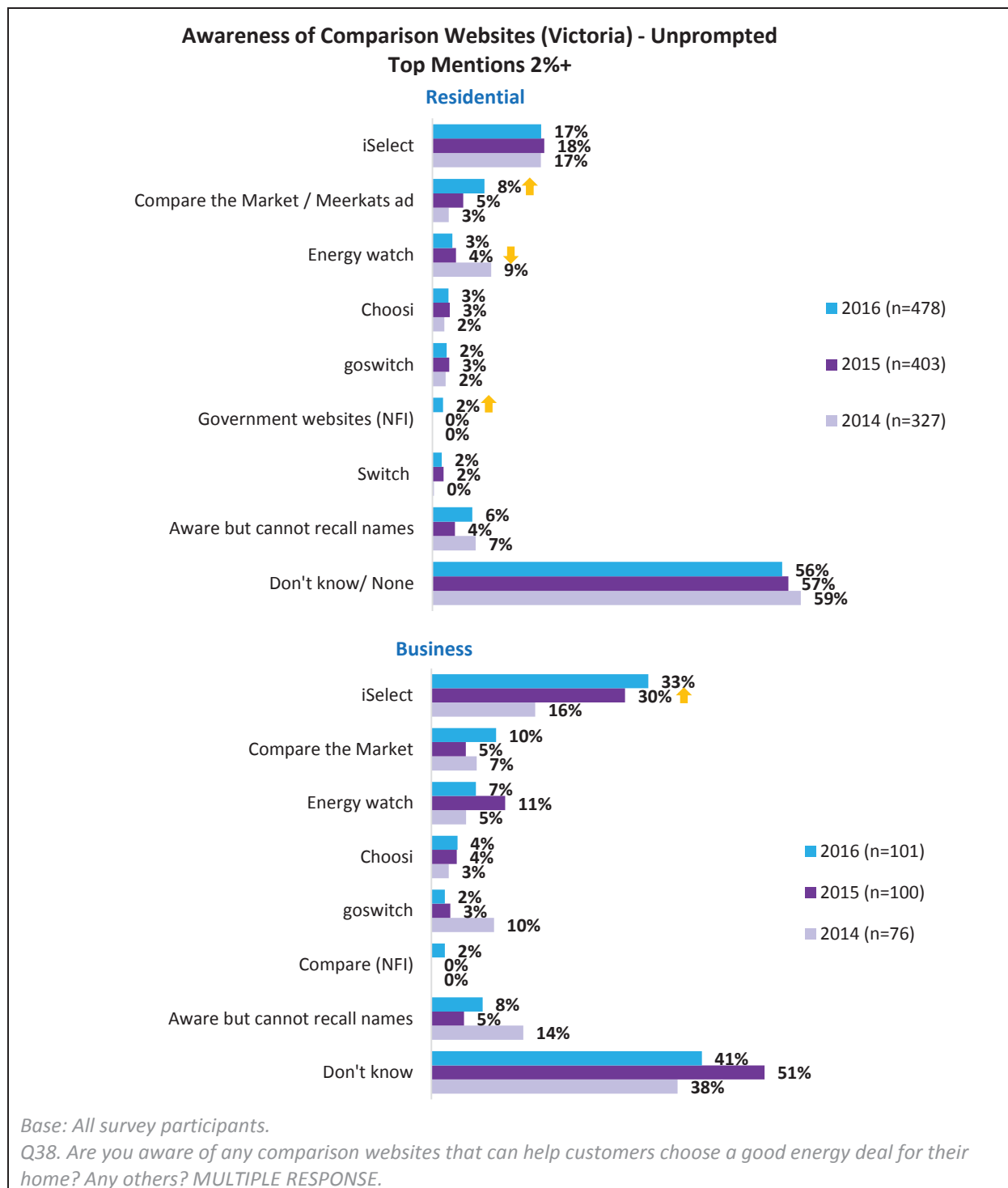
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

Unprompted recall of comparison websites remained quite steady yet fairly low over time, and virtually non-existent for the independent Victorian Government websites in particular

Unprompted awareness of comparison websites among residential customers remained low, with just over a third of consumers able to name a comparator website (36% in 2016, 36% in 2015 and 33% in 2014). A further 6% were aware there were comparison sites but could not recall any specific names. iSelect remained the most commonly mentioned comparison site (17%) followed by Compare the Market (8% significantly higher than 3% in 2014), Energy Watch (stable at 3%, following a significant from 9% in 2014 to 4% in 2015), Choosi (3%) and GoSwitch (2%).

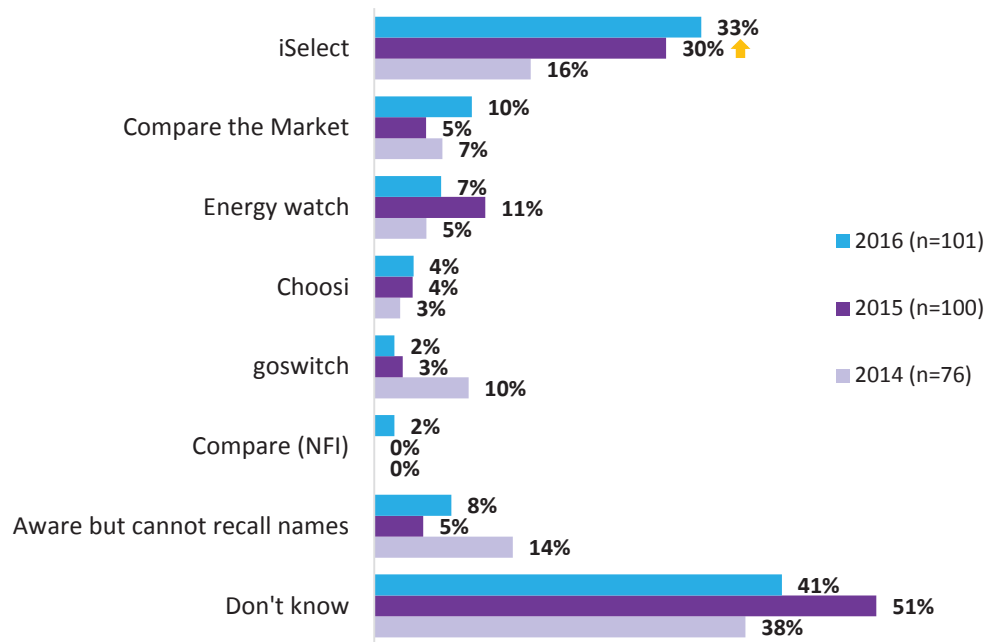
Although not statistically significant, unprompted awareness of comparison websites among *business consumers* improved slightly on 2015, as shown below. Nearly half were able to name at least one comparison site (48% in 2016, up from 42% in 2015 and 36% in 2014) and a further 8% were aware but unable to recall any specific names.

As with residential consumers, iSelect was the most commonly mentioned comparison site among small business consumers (33% in 2016 vs. 30% in 2015, up from 16% in 2014). A much smaller proportion of consumers again recalled Compare the Market (10%), Energy Watch (7%) and Choosi (4%).



Awareness of Comparison Websites (Victoria) - Unprompted
Top Mentions - 2%+

Business

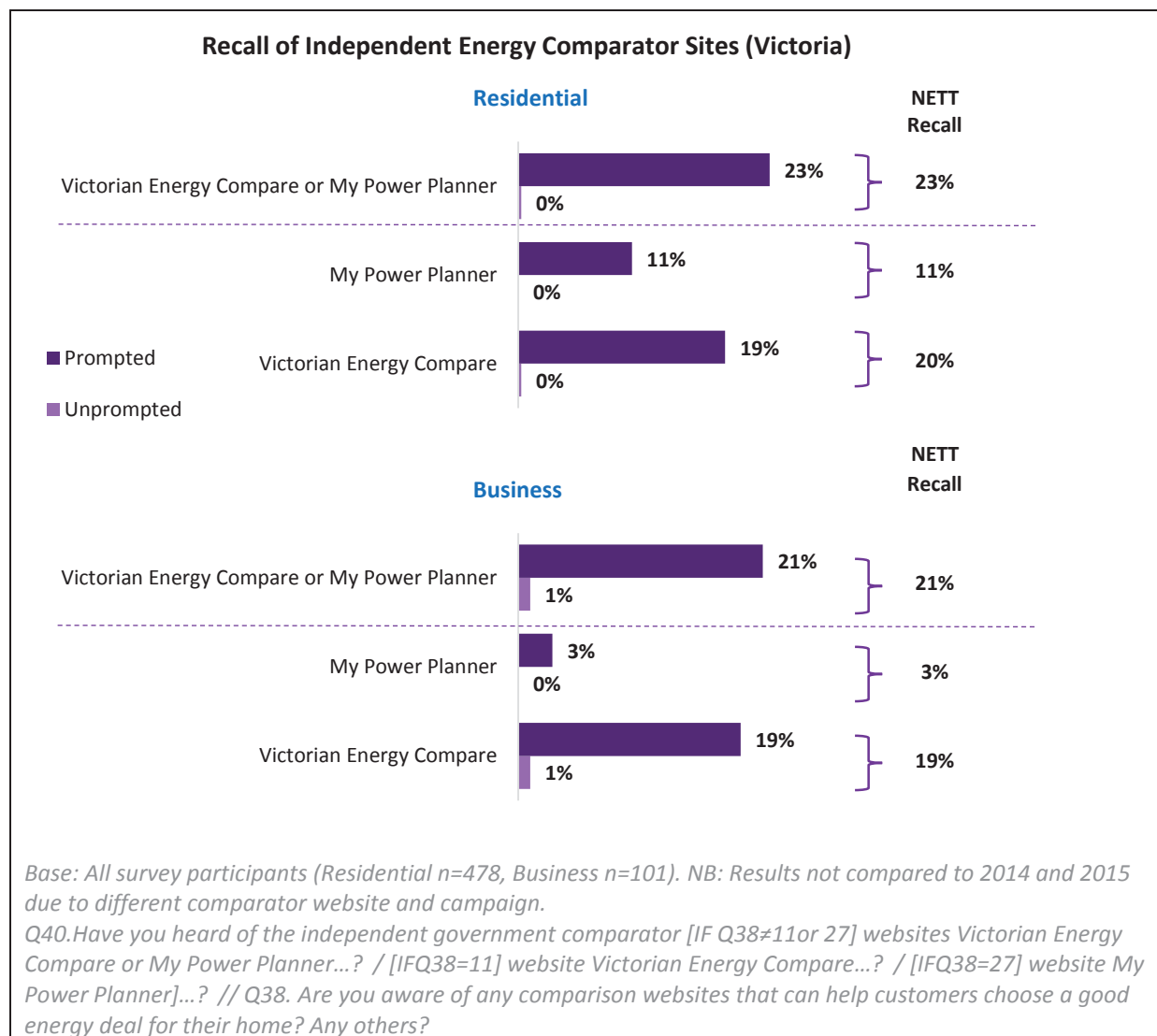


Base: All survey participants.

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

Whilst unprompted recall of the Victorian Energy Compare and My Power Planner websites was low, when prompted, almost a quarter of residential consumers had heard of one or both of these

Among consumers, there was higher awareness of the Victorian Energy Compare website (20% nett prompted and unprompted recall among residential consumers, 19% among businesses) than for My Power Planner (11% and 3% respectively).



Switching rates have continued to decline since 2014

The incidence of switching energy company and/or plan in the *last five years* has declined year-on-year among both residential and business consumers in Victoria. Specifically among *residential* consumers this has fallen from 67% in 2014 to 54% in 2016, and for *business* consumers from 66% to 46% respectively.

In 2016, residential consumers who were over 55 years of age were significantly more likely to have switched electricity or gas company or plan in the past five years (64%) than those under 55 years of age (50%). In line with previous years' findings, those who had actively investigated offers and options were more likely to have switched in the last five years (70% vs. 48% among those who had not actively looked into it). This was also true among residential consumers who had switched *in the last 12 months* (49% vs. 20% of switchers who hadn't actively investigated their options).

Switching rates in *the past 12 months* remained stable among residential consumers, with three in ten reporting having switched (30%). Among business consumers though, these rates have almost halved from four in ten switching energy company or plan in 2015 (39%) to one in five in 2016 (20%).

Whilst switching rates in Victoria have declined, overall levels continue to be higher than in other NEM jurisdictions. Switching rates also tend to be higher for electricity and gas in comparison with other services and utilities.

Switching Rates for Various Service Providers - Last Five Years

Incidence of Switching (% switched at least once in <u>last five years</u>)	VICTORIA Residential			VICTORIA Business		
	2014 (n=327)	2015 (n=403)	2016 (n=478)	2014 (n=76)	2015 (n=100)	2016 (n=101)
Electricity Company	54%	48%	43% ↓	57%	50%	36%
Electricity Plan	43%	35% ↓	25% ↓	46%	27% ↓	22%
TOTAL Electricity	65%	56% ↓	52%	65%	59%	45% ↓
Gas Company	47%	39%	36%	52%	10% ↓	9%
Gas Plan	31%	23%	18%	60%	15% ↓	9%
TOTAL Gas	56%	46% ↓	46%	67%	17% ↓	15%
TOTAL Electricity or Gas	67%	57% ↓	54%	66%	60%	46% ↓
Car Insurance	33%	31%	33%	*Business consumers not asked these questions.		
Mobile	32%	32%	28%			
Internet	28%	27%	27%			
Home Insurance	22%	23%	21%			
Home Phone	21%	17%	19%			
Banking	18%	17%	14%			
Health Insurance	13%	17%	14%			

Base: All survey participants.

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?

Switching Rates for Electricity and Gas Last 12 Months

Incidence of Switching (% switched at least once in <u>last 12 months</u>)	VICTORIA Residential		VICTORIA Business	
	2015 (n=403)	2016 (n=478)	2015 (n=100)	2016 (n=101)
Electricity Company	21%	18%	29%	11% ↓
Electricity Plan	18%	15%	15%	13%
TOTAL Electricity	27%	27%	39%	20% ↓
Gas Company	18%	17%	10%	3%
Gas Plan	13%	12%	10%	6%
TOTAL Gas	23%	24%	9%	6%
TOTAL Electricity or Gas	29%	30%	39%	20% ↓

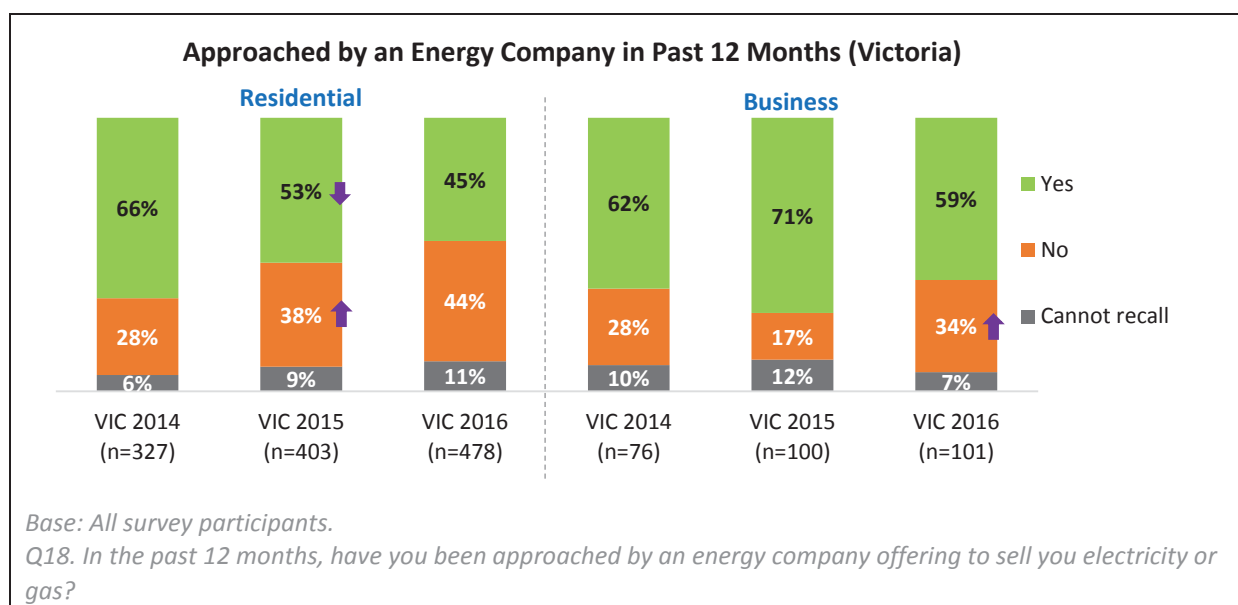
Base: All survey participants.

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?

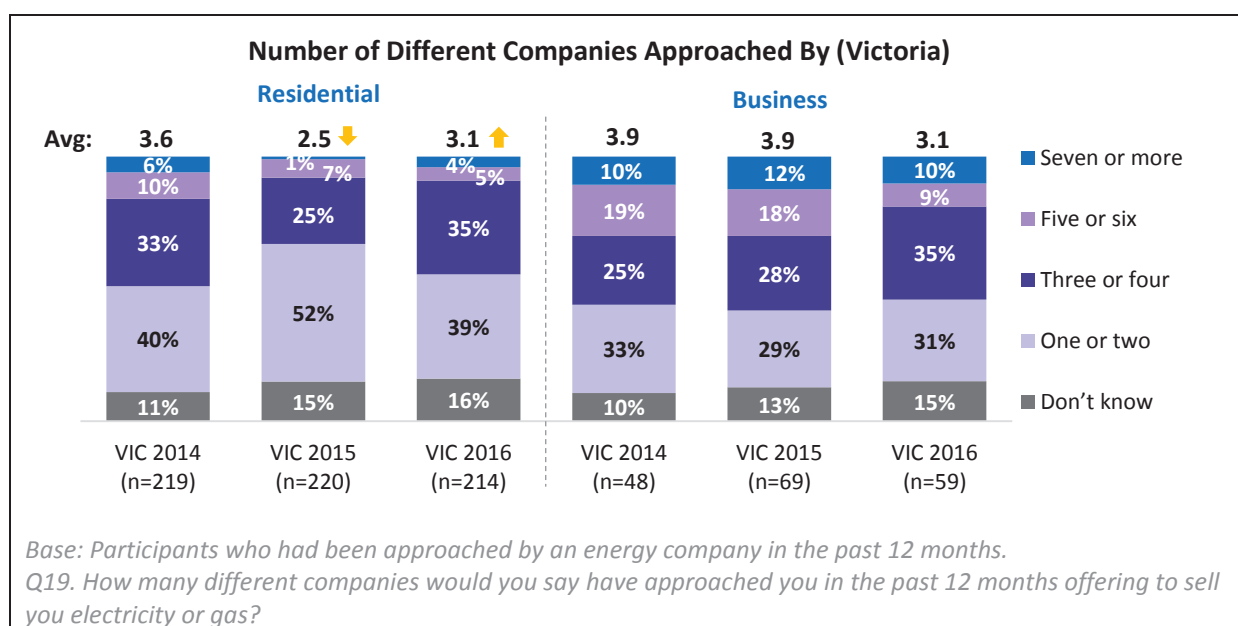
The decline in last-five-years switching rates in Victoria is likely influenced by the continued drop in direct approaches from retailers

A further decline in the rate of consumers having switched energy company or plan in the last five years again coincides with fewer direct approaches by energy companies offering to sell consumers electricity or gas in the past 12 months. Fewer than half of the *residential* consumers surveyed reported being approached by an energy company in the past 12 months (45%), which is significantly lower than in both 2014 (66%) and 2015 (53%).

The largest proportion of *businesses* to date also reported not being approached by an energy company; at 34% - significantly higher than in 2015 (17%) and slightly higher than in 2014 (28%).



Consumers who were approached were then asked how many companies approached them. There was a significant increase in the number of companies residential consumers reported being approached by in the past 12 months; up from 2.5 on average in 2015 to 3.1 this year, but still fewer than the average of 3.6 in 2014. Business consumers reported slightly fewer different company approaches than in the previous two reviews: 3.1 on average compared with 3.9 in both 2014 and 2015.



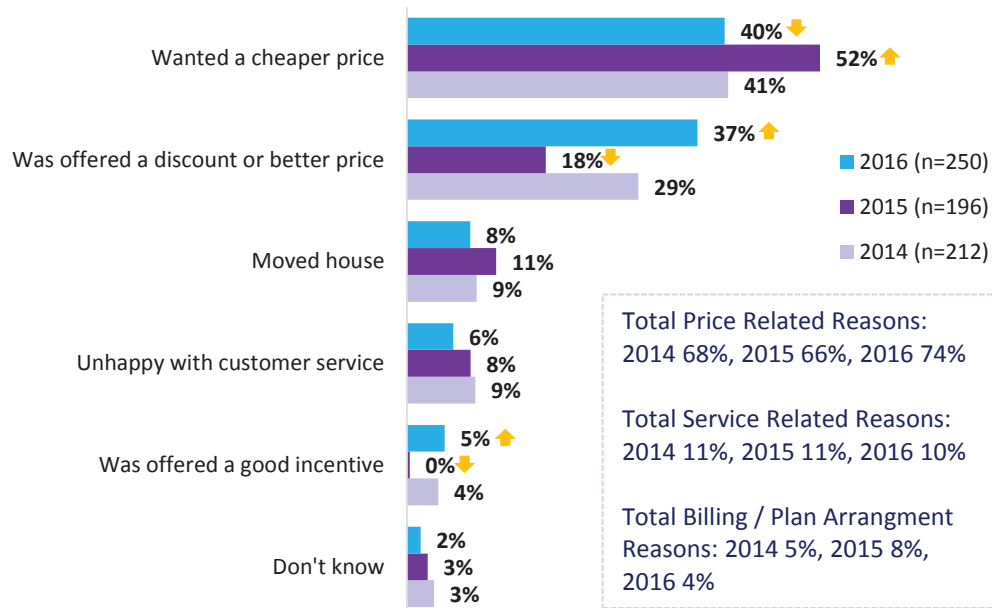
Price related factors remained the main unprompted reason for switching

Price related factors (i.e. wanting a cheaper price, being offered a discount, rebate or price incentive, or moving to a new tariff) remained the main reason for switching electricity company or plan in 2016. Three quarters (74%) of residential consumers and 83% of business consumers mentioned such factors in this unprompted question, where responses were subsequently manually coded to measure the incidence of response themes.

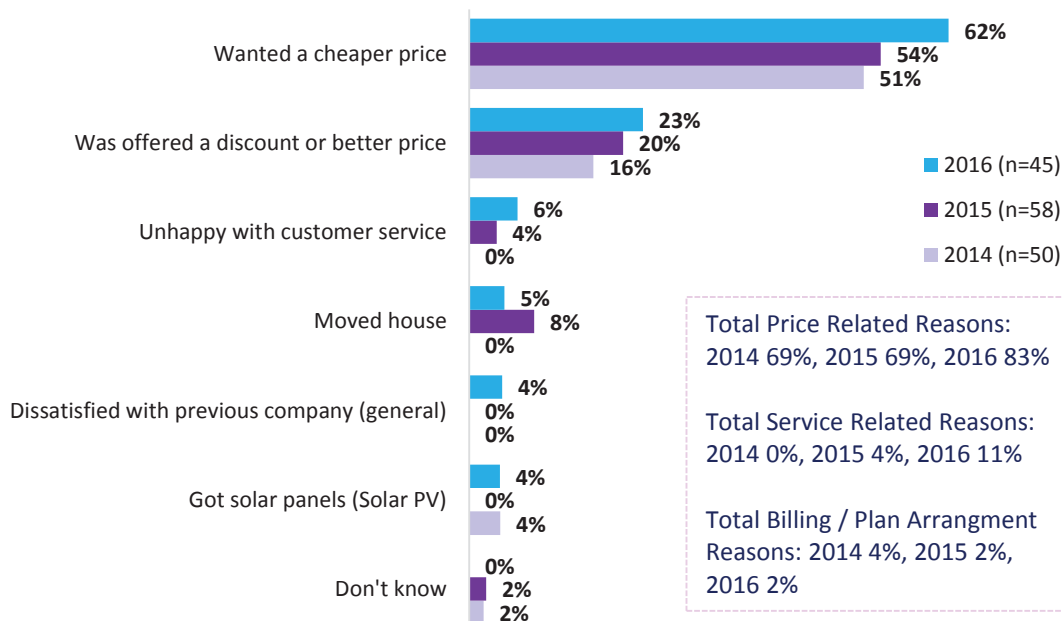
Main Reason for Switching Electricity Company or Plan (Victoria) - Unprompted

Top Mentions 3%+

Residential



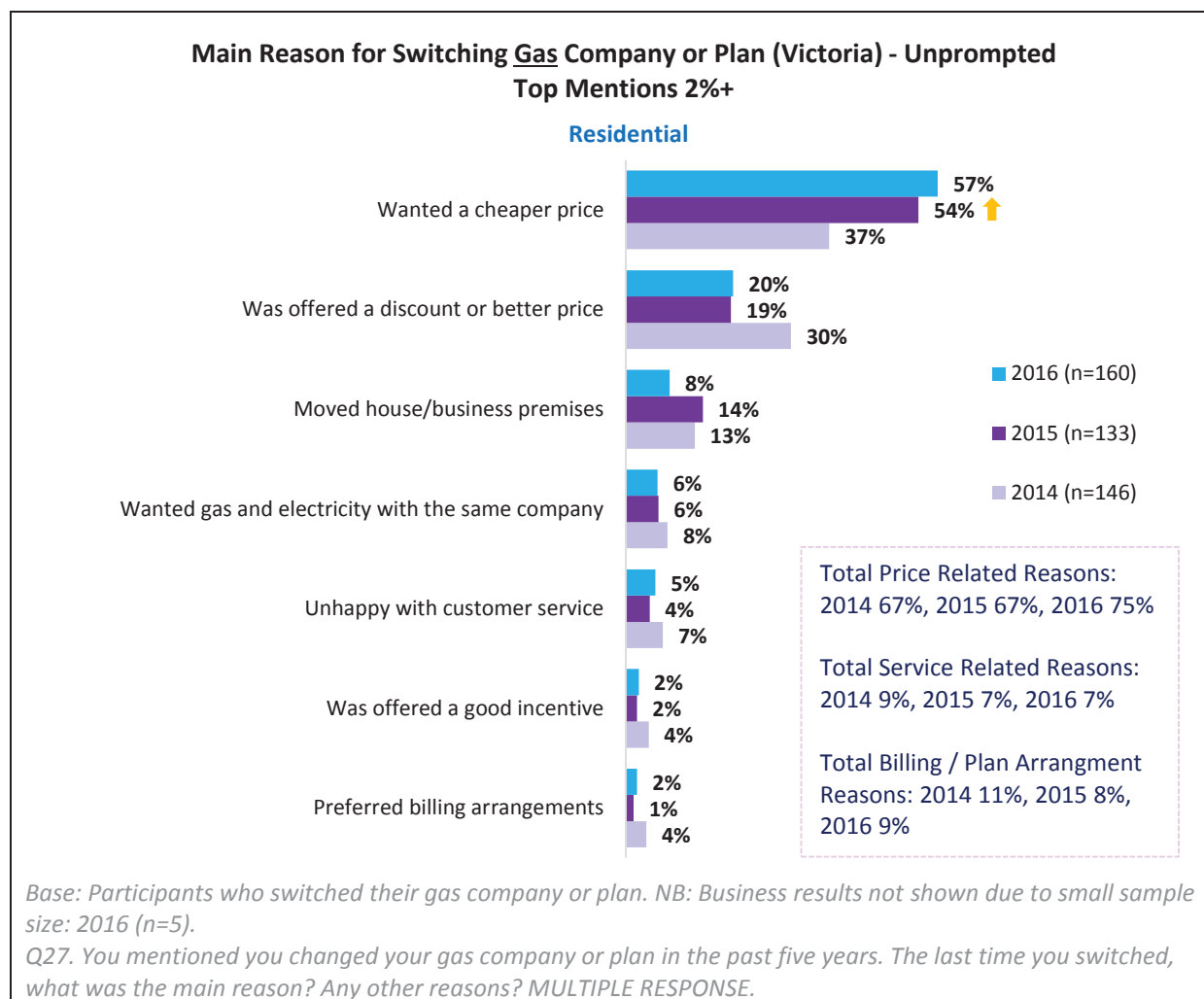
Business



Base: Participants 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.

Price related factors were also the main reason for switching gas company or plan in 2016 among residential consumers (nett 75%).



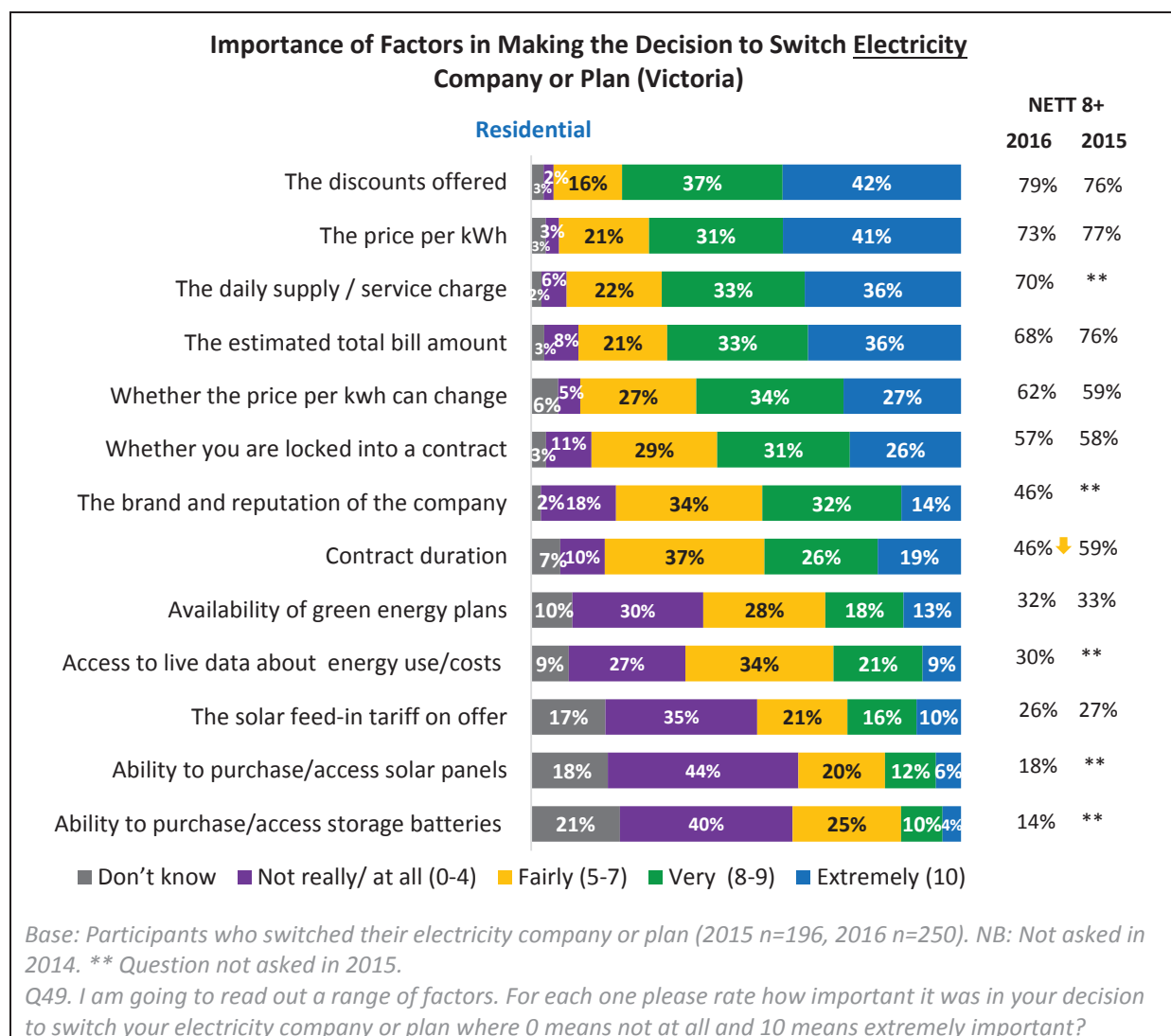
When prompted with a range of considerations, the discounts offered and the price per kWh were again considered the most important factors in the decision to switch electricity company or plan

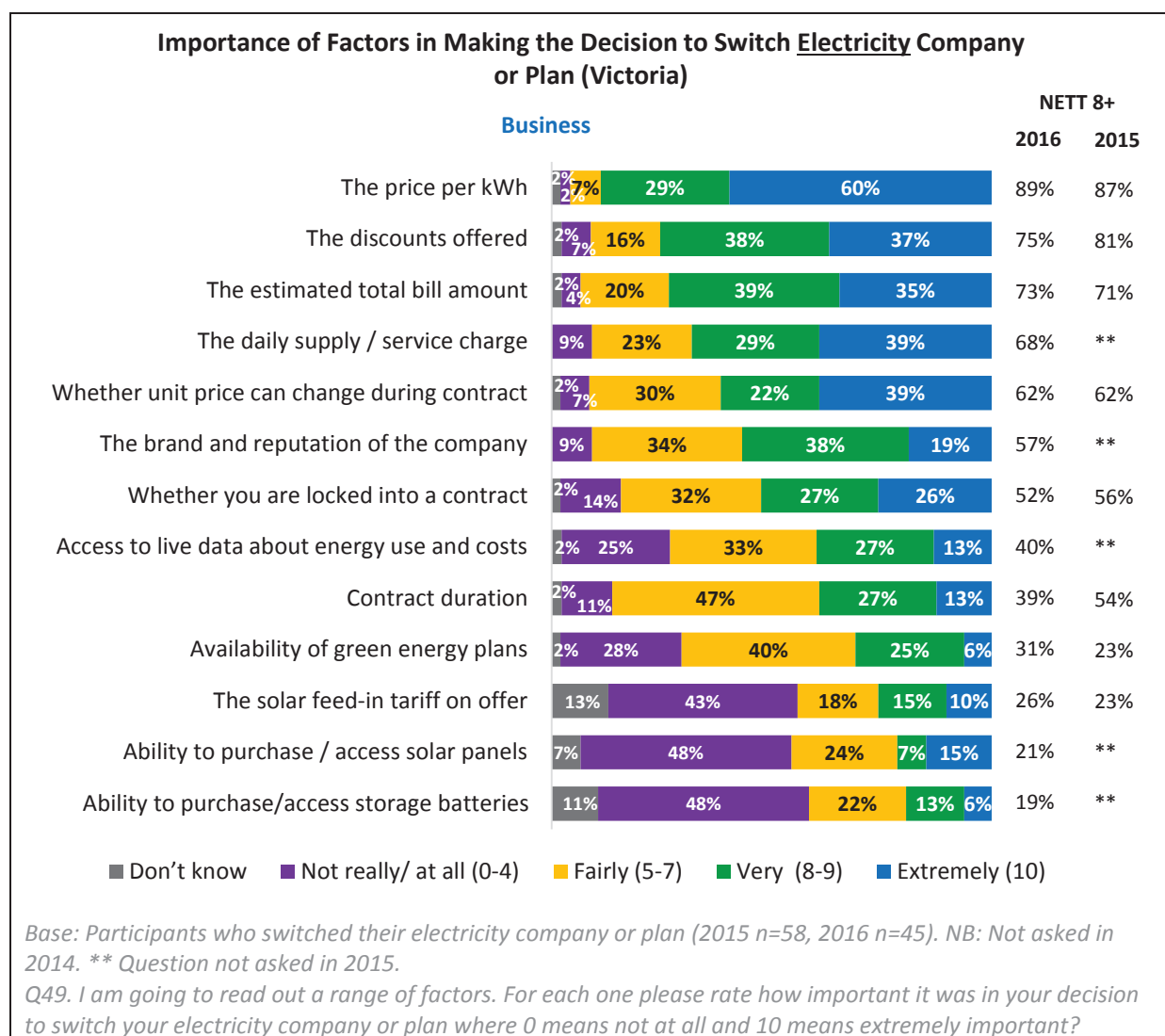
In line with 2015 results, when *those who had switched company or plan in the last five years* were prompted with a range of factors that could be considered when deciding whether or not to switch, the most important ones for residential consumers were again the discounts offered (nett 79% gave this an importance rating of 8 or more out of 10 vs. 76% in 2015) and the price per kWh (nett 73% vs. 77%). Among small business consumers the price per kWh (89% vs. 87%) and the discounts offered (81% vs. 75%) were again the most important.

Of least importance to switchers were the ability to access storage batteries (14% among residential consumers, 19% among businesses), the ability to access solar panels (18%, 21%) and the solar feed-in tariff (26%, 26%).

For residential consumers with solar panels, the solar feed-in tariff was the second highest level priority after the discounts offered, with 80% rating this 8 or more out of 10. Solar consumers also gave significantly higher ratings for the importance of the availability of green energy plans (55% vs. 26% among those without solar), access to live data (45% vs. 26%), the ability to purchase or access solar panels (36% vs. 13%) and the ability to purchase or access storage batteries (26% vs. 11%).

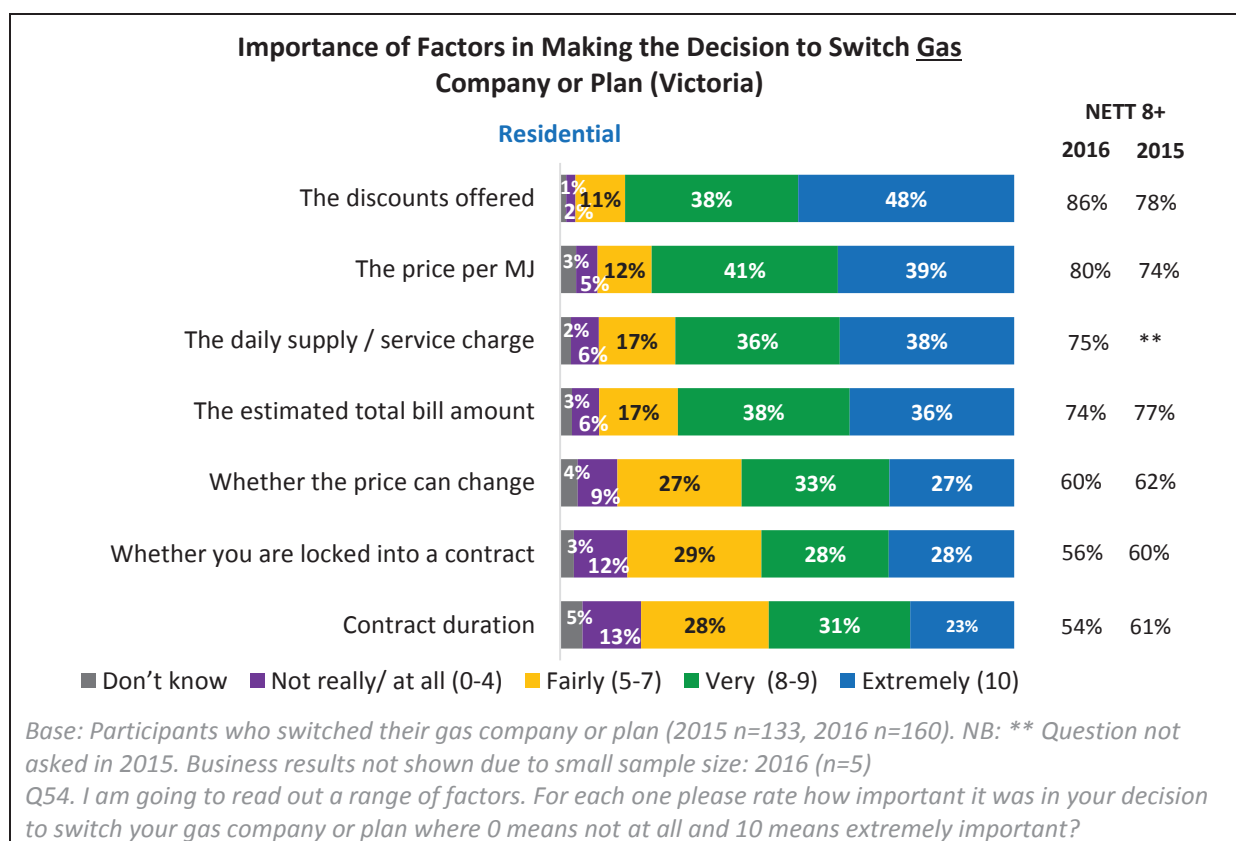
The importance ratings for business consumers surveyed are charted over the page.





As charted on the following page, the importance of factors in deciding to switch among residential gas consumers were similar to those for electricity. The most important overall were the discounts offered (nett 86% giving an importance rating of 8 or more out of 10 vs. 78% in 2015) and the price per megajoule (nett 80% vs. 74%). A new factor included this year was the daily supply charge, which emerged as the third most important overall (75% rated this 8 or higher).

Results for business gas consumers are not illustrated due to small sample sizes of less than n=30.



Consumers with higher energy bills wanted to see a bigger saving before considering switching

In order to seriously consider switching their company or plan, on average residents indicated that they would need to save \$229 per year on their electricity bill, which is significantly more than in 2015 (\$201). For their gas bill, the amount was \$178 on average, which is slightly higher than the 2015 average of \$169.

By comparison and reflecting their higher average energy bills, small business consumers felt they would need to save about \$578 on their *electricity* bill in order to consider switching, which is significantly higher than in 2015 (\$366), and \$315 on their *gas* bill – also up somewhat from \$196 in 2015.

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	VICTORIA Residential		VICTORIA Business	
	2015 (n=403)	2016 (n=478)	2015 (n=100)	2016 (n=101)
Total	\$201	\$229 ↑	\$366	\$578 ↑
Last Quarterly Electricity Bill: Low	\$182	\$206	\$262	\$294
Last Quarterly Electricity Bill: Medium	\$193	\$232	\$417	\$797
Last Quarterly Electricity Bill: High	\$263	\$268	\$517	\$880

Base: All survey participants.

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? Residential: "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above. Business: "Low" is <\$500, "Medium" is \$500 to <\$1,000, "High" is \$1,000 and above.

Amount Needed to Save Annually on Gas Bill to Seriously Consider Changing (Average by Bill Size)	VICTORIA Residential		VICTORIA Business	
	2015 (n=329)	2016 (n=352)	2015 (n=39)	2016 (n=34)
Total	\$169	\$178	\$196	\$315
Last Quarterly Gas Bill: Low	\$142	\$148	\$169	\$127
Last Quarterly Gas Bill: Medium	\$191	\$187	\$186	\$506
Last Quarterly Gas Bill: High	\$187	\$205	\$249	\$336

Base: Participants with mains connected gas.

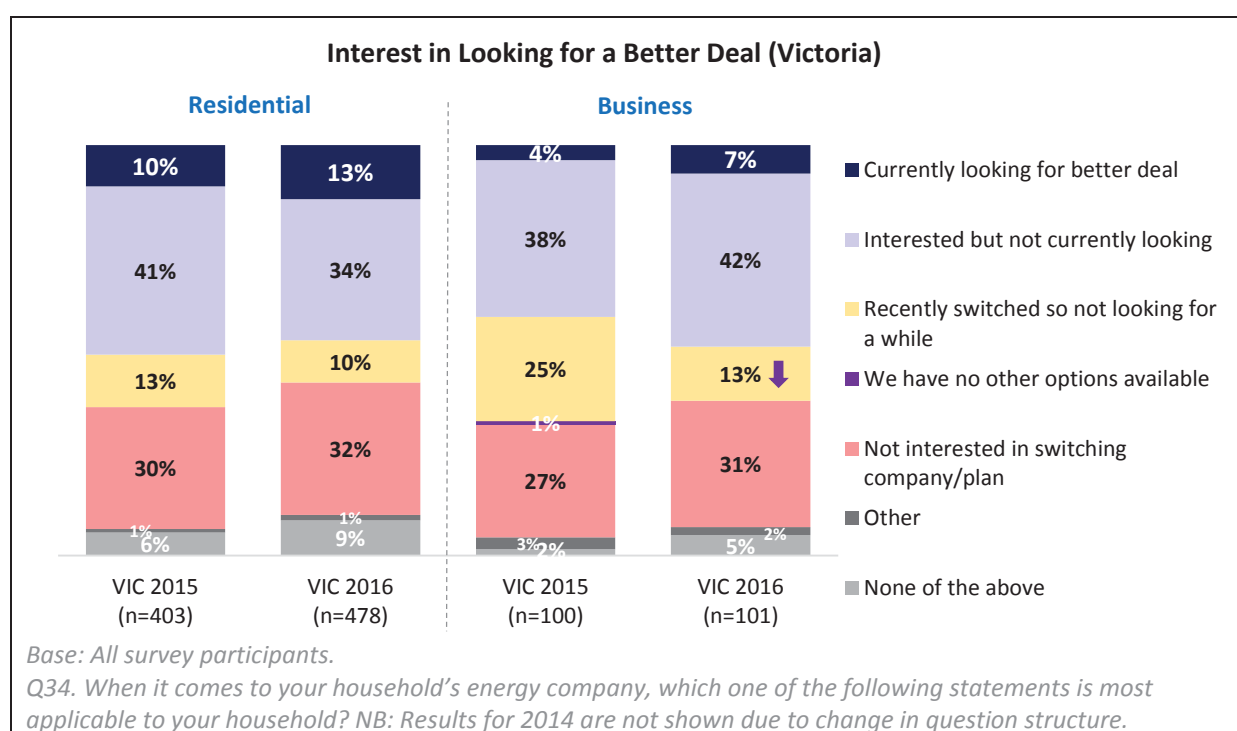
Q61. What is the minimum amount of money you would need to save annually on your gas bill in order to seriously consider changing your company or plan? "Low" is <\$200, "Medium" is \$200 to <\$300, "High" is \$300 and above.

Around half of consumers were either seeking or interested in seeking a better deal

When asked about their current intentions in relation to switching, around half of residential consumers (nett 47%) were *currently looking or interested in looking for a better deal*. This is similar to 2015 (51%).

Roughly the same proportion of business consumers were *currently looking or interested in looking for a better deal* (49%), which is higher than in 2015 (42%).

Around a third of consumers were *not* interested in switching company or plan at all (32% of residential and 31% of business consumers).



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:

- In a high income household (60% among those earning \$100,000 or more annually vs. 44% among those earning less than \$100,000);
- Under the age of 55 years (53% vs. 37% of those aged 55 years or over);
- Had switched in the last five years (54% vs. 39% among those who hadn't); and/or

- Had a relatively high quarterly electricity bill (63% with a bill \$500 or higher vs. 44% with a bill lower than \$500).

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

- Be in a lower income household (42% earning less than \$50,000 annually vs. 26% of those earning \$50,000 or more);
- Have a low quarterly electricity bill (43% of those with a bill less than \$300 vs. 24% of those with a bill of \$300 or more);
- Have actively investigated offers and options in the last 12 months (40% vs. 19% among those who had not); and
- Have not switched company or plan in the past five years (44% vs. 22% among those who had not).

5.2.2 Consumer Outcomes

Introduction

This section of the report details the findings on Victorian consumers’:

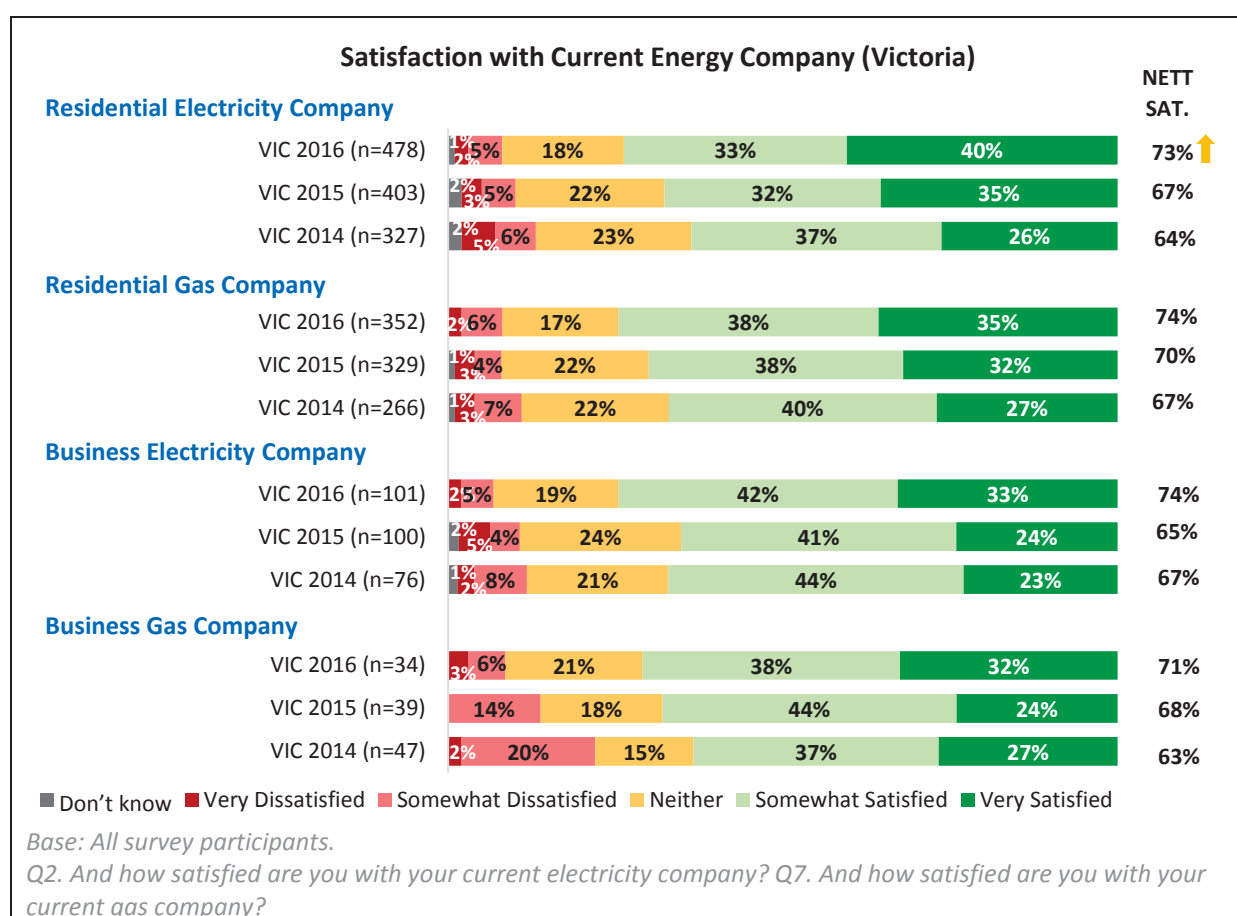
- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market;
- Satisfaction with the switching process among those who had done so;
- Consumer confidence that they can find the right information and make the right choice in the market; and
- Attitudes towards switching.

The Results

More Victorian consumers were at least somewhat satisfied with their energy companies this year

To provide context to the consumer activity results, all survey participants were asked whether they were satisfied with their current energy companies. There has been a significant increase in the proportion of *residential* consumers who are satisfied with their current electricity company. Almost three quarters (nett 73%) were somewhat or very satisfied in 2016, up from 67% in 2015 and 64% in 2014. Satisfaction with their gas company has improved year-on-year although the trend is not statistically significant; rising from 67% nett satisfied in 2014 to 74% in 2016.

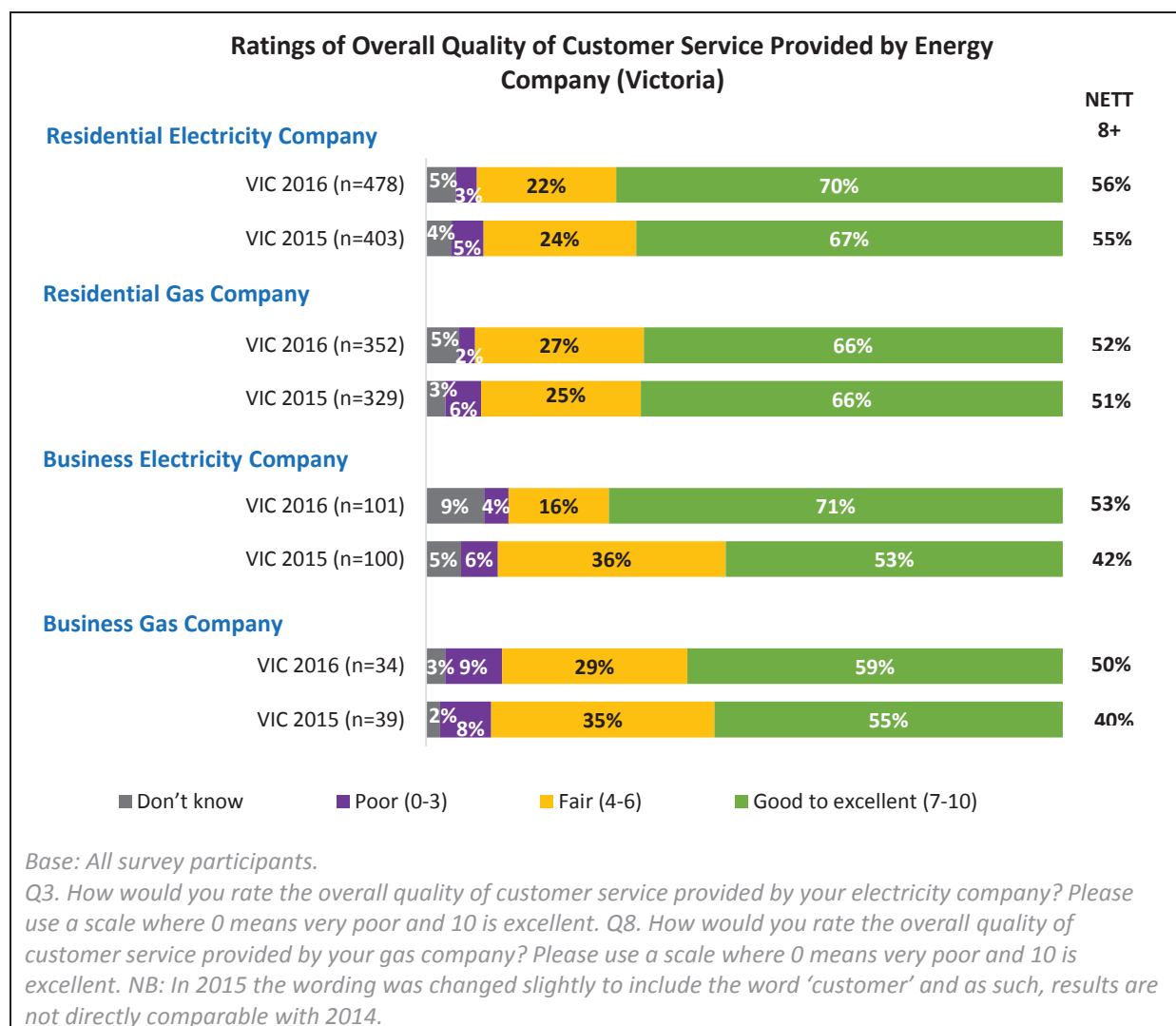
Satisfaction levels are similar among small business consumers, showing an improvement (although not statistically significant) compared with the 2014 benchmark. Three quarters (nett 74%) were satisfied with their electricity company in 2016, compared with 65% in 2015 and 67% in 2014. For businesses’ gas company, nett satisfaction has risen somewhat from 63% in 2014 to 71%



When it came to the overall quality of customer service provided by their electricity company, in line with 2015 results just over half of residential consumers gave a high rating of 8 or more on a scale of 0 (very poor) to 10 (excellent): i.e. 56% vs. 55% in 2015.

Similar ratings were provided for the overall quality of customer service provided by their gas company: 52% gave a rating of 8 or higher in 2016 vs. 51% in 2015.

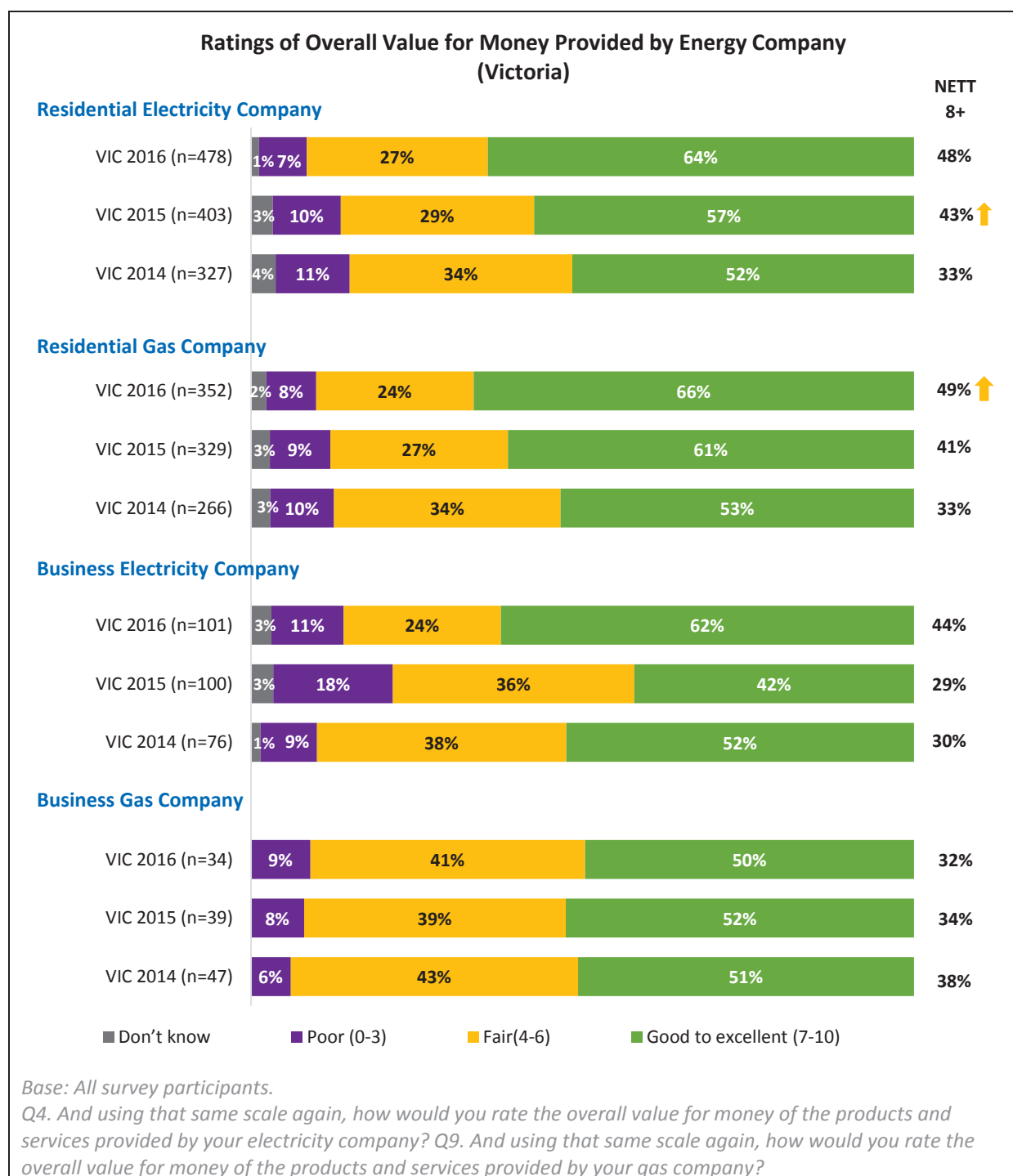
Among small business consumers, service ratings for electricity companies improved from 42% nett 8 or more out of 10 in 2015 to 53%, although this change was not *statistically* significant. Their ratings for gas companies also improved somewhat from 40% in 2015 to 50% this year.



Overall value for money ratings were at their highest this review, except for business gas companies which saw a slight decrease from the benchmark wave

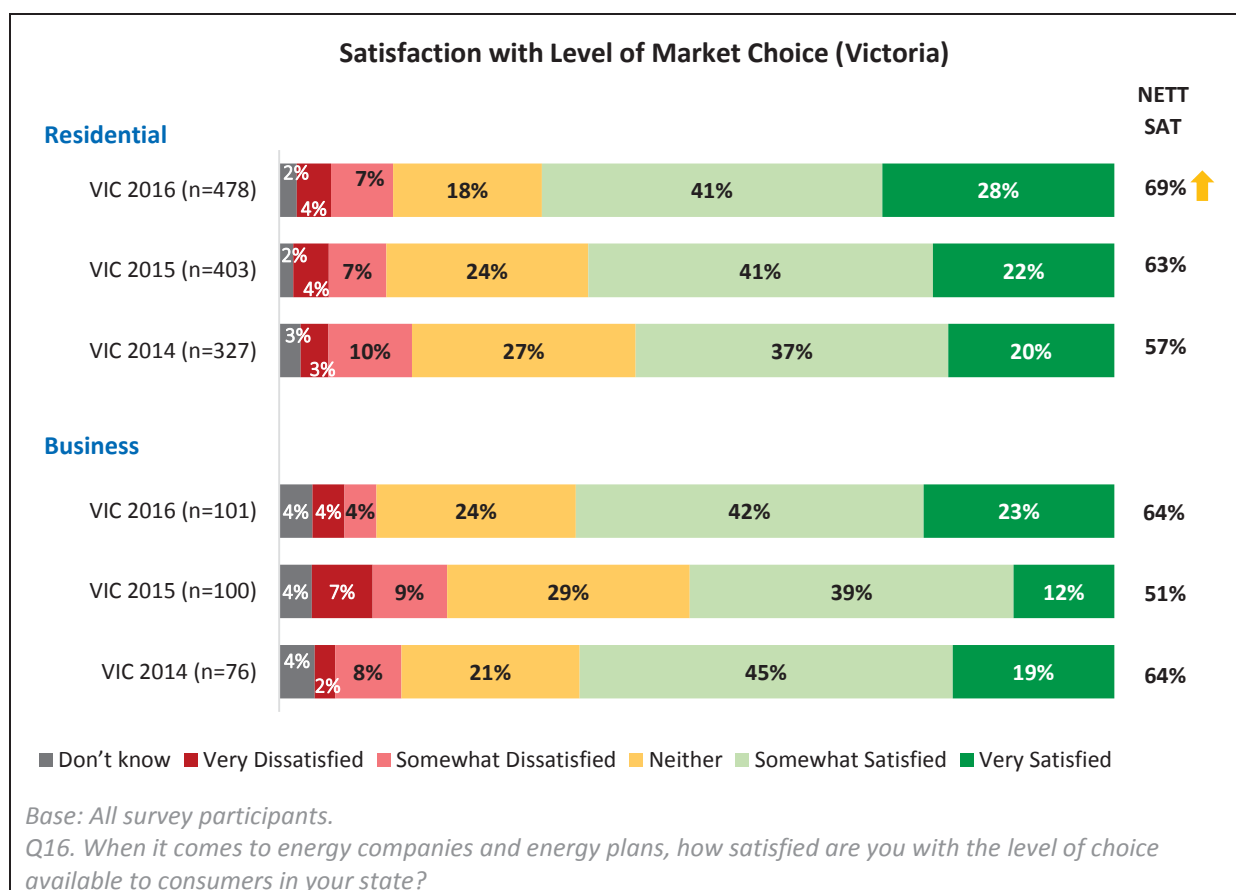
As shown in the chart over the page, among residential consumers, ratings of overall value for money with their electricity company have been improving over time: nett ratings of 8 or more out of 10 were up from 33% in 2014 to 48% in 2016. The same trend is evident for gas companies, with a significant increase in high ratings of value for money from their gas company; from 33% in 2014 up to 49% in 2016.

Again, although not statistically significant due to the smaller sample size, value for money ratings also improved among small business consumers in 2016, with 44% giving their electricity company a rating of 8 or more vs. 29% in 2015 and 30% in 2014. However, ratings for their gas companies have remained relatively stable year-on year and were at 32% nett 8+ in 2016.



The majority of residential and business consumers surveyed in Victoria remained satisfied with the level of choice in the energy market

Participants were asked to indicate their satisfaction with the level of market choice in Victoria. The results among residential consumers have improved slightly year-on-year, with 69% somewhat or very satisfied in 2016, up significantly from 57% in 2014 and up slightly from 63% in 2015. Among *small businesses* there was an improvement this year, returning to the benchmark levels: 64% in 2016 vs. 51% in 2015 and 64% in 2014.

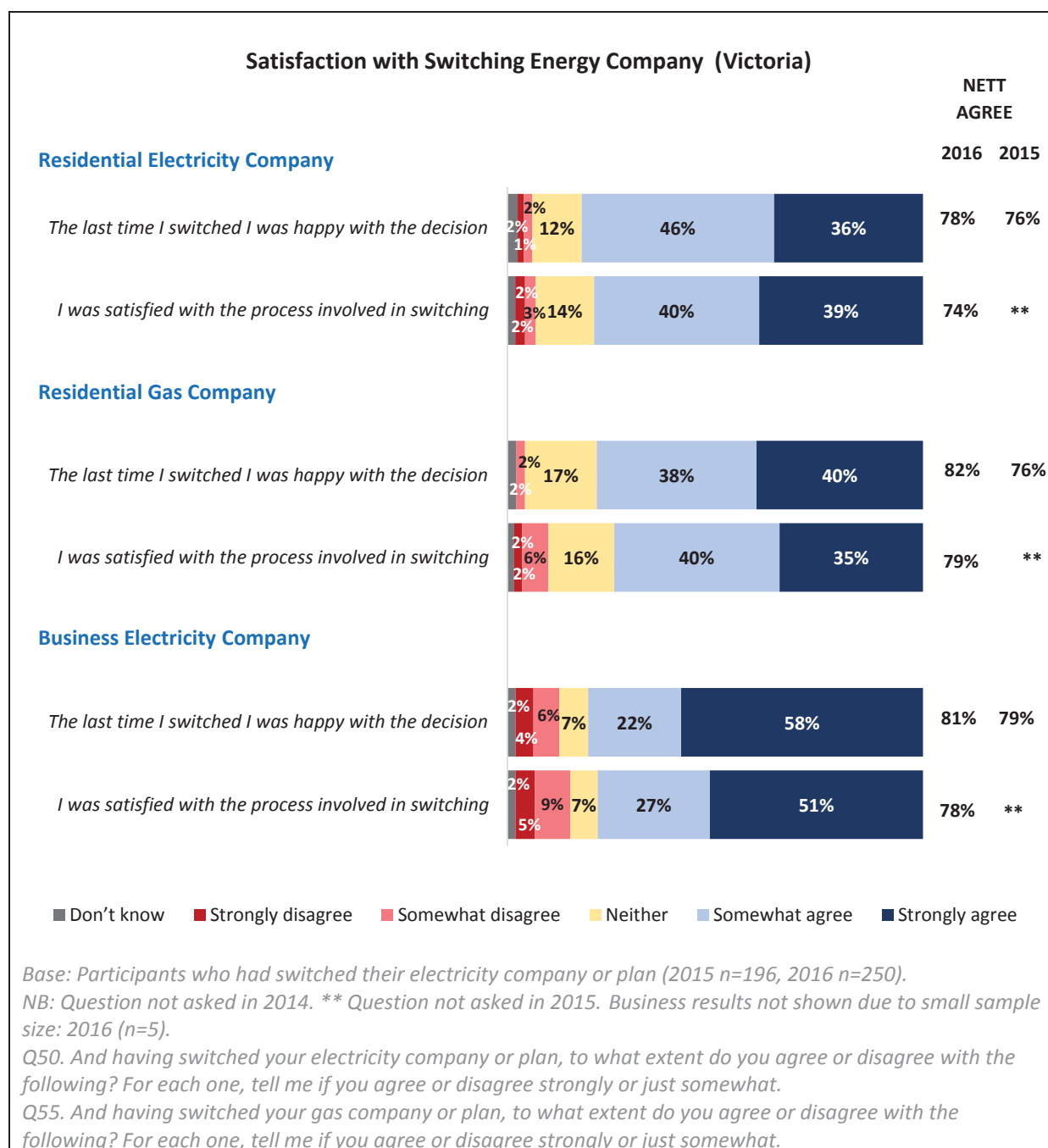


The majority of consumers who had switched their electricity company or plan were happy with their decision and satisfied with the process involved

The attitudes of *consumers who had switched electricity company or plan* were explored through measuring agreement / disagreement levels with several statements. Most again agreed that *the last time I switched I was happy with the decision*: 78% of residential consumers in 2016 compared to 76% in 2015, and 81% of business consumers vs. 79% in 2015.

Around three quarters of consumers agreed with the new statement, *I was satisfied with the process involved in switching* (74% of residents and 78% of small business consumers).

In line with 2015 results, most residential consumers who had switched their gas company or plan also agreed that *the last time I switched I was happy with the decision* (82% in 2016 vs. 76% in 2015), and that *I was satisfied with the process involved in switching* (79%).

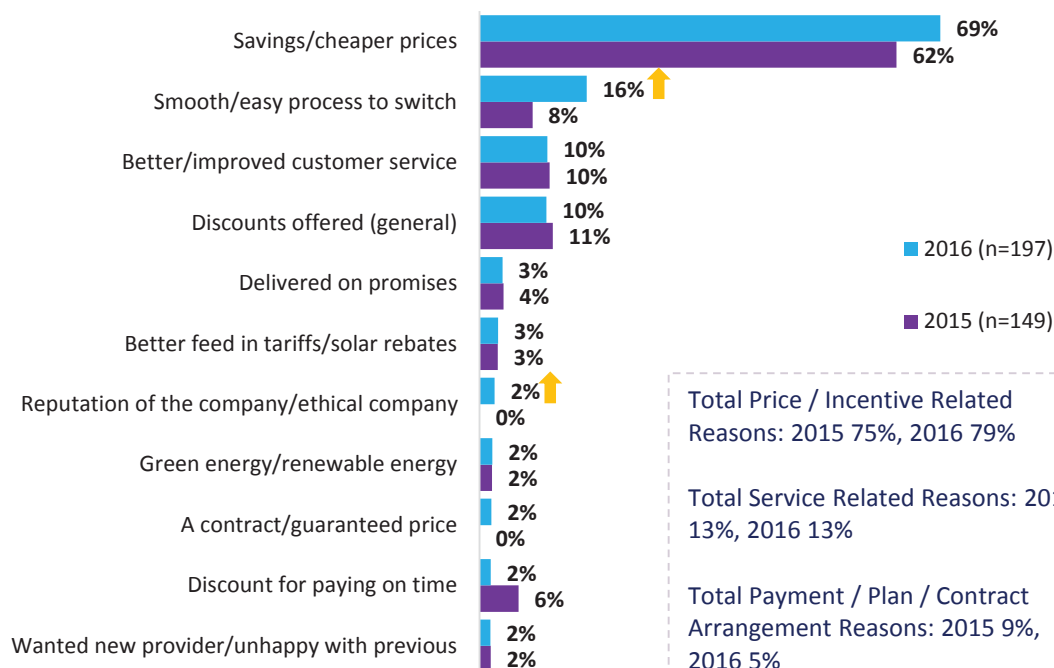


As shown on the following page and similar to results in 2015, residential consumers *who were happy with their decision to switch electricity company* were most likely to feel that way as a result of the savings and cheaper prices (69%, unprompted), and at much lower levels because the process was smooth and easy (16%, up significantly from 8% in 2015), and the customer service was better (10%).

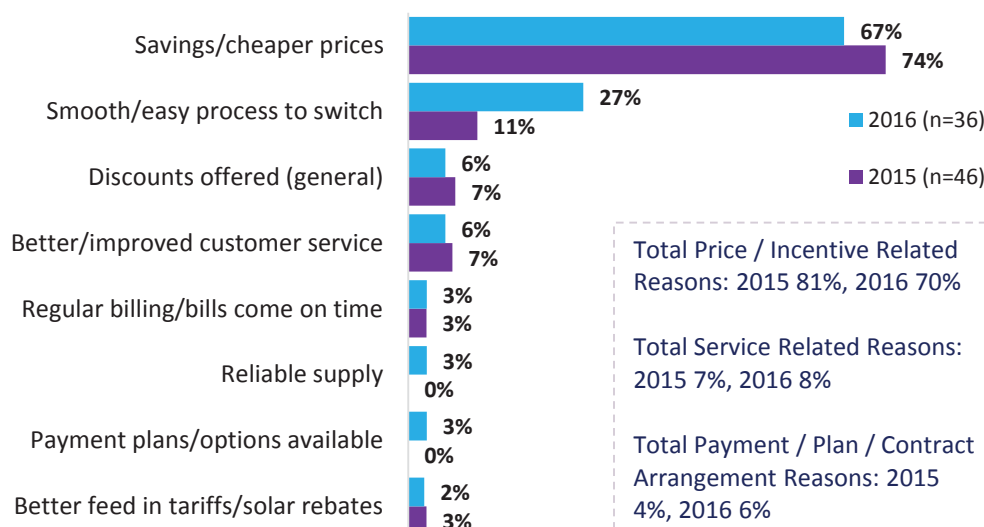
Business consumers who were happy with their decision to switch electricity company cited similar reasons to residential consumers and those they stated in 2015, including savings and cheaper prices (67%), the process being smooth and easy (27%), the discounts offered (6%) and improved customer service (6%). There were some very low level mentions of the company's reputation in 2016 (2%, up from no mentions in 2015).

Reasons for Being Happy with the Decision to Switch Electricity Company or Plan Unprompted (Victoria), Top Mentions 2%+

Residential



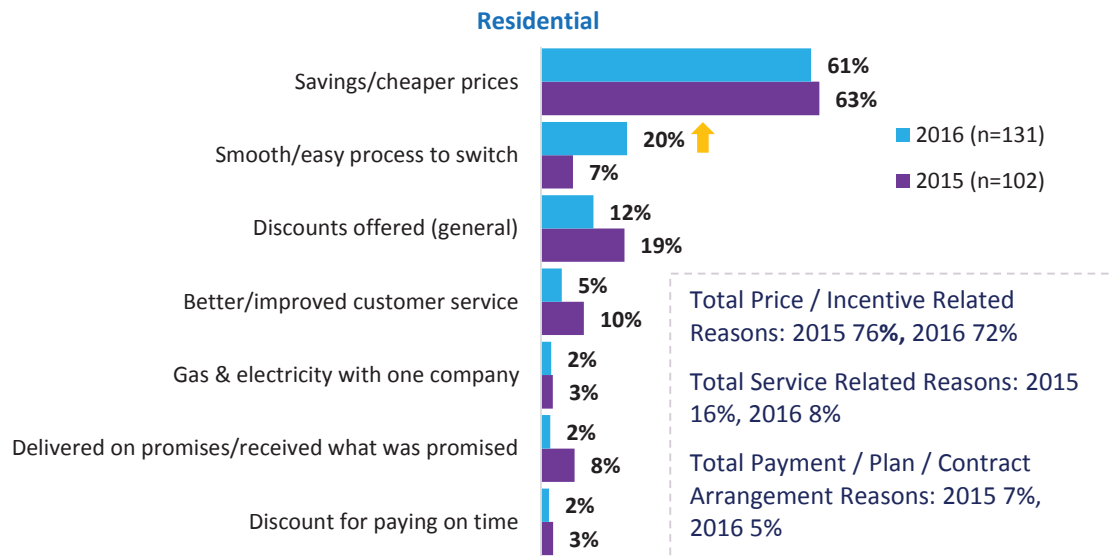
Business



Base: Participants 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.

Residential consumers happy with their decision to switch gas company mentioned similar reasons including savings and cheaper prices (61%), because the process was smooth and easy (20% up significantly from 7% in 2015), and/or because of the discounts offered (12%) and improved customer service (5%).

**Reasons for Being Happy with the Decision to Switch Gas Company or Plan
Unprompted (Victoria), Top Mentions 2%+**



Base: Participants who agreed they were happy with their decision to switch gas company or plan. NB: Business results not shown due to small base size: 2016 (n=3).

Q30B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE.

Importantly, only six residential consumers and five business consumers were not happy with their decision to switch. The reasons for not being happy in 2015 were regarding unclear tariff prices and contract terms whereas in 2016 the main reasons in broad descending order of mentions were changes to the price after switching, billing issues and customer service issues. A selection of their verbatim responses are included below:

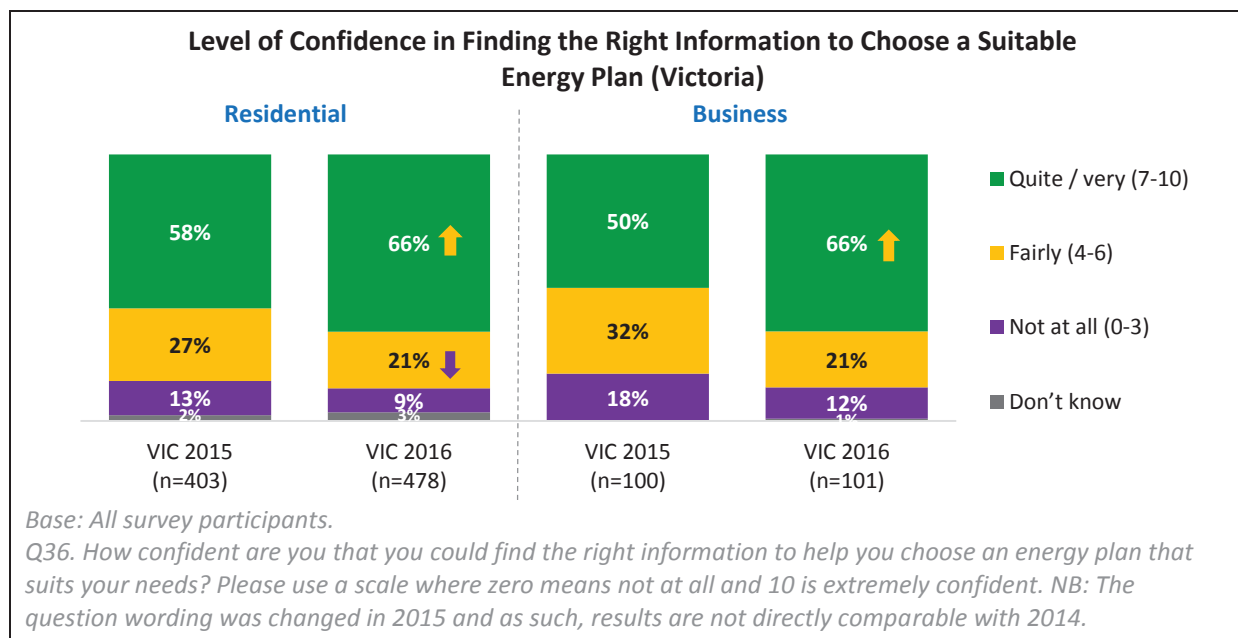
“They didn’t offer the deal I was promised.” Residential Consumer

“Of course they increased the price of gas and electricity to offset any gains; typical of this and other energy providers. Their only concern is for their shareholders, customers mean nothing to them. Strange really because without customers they don’t have a business and by extension wouldn’t therefore have any shareholders to appease.” Residential Consumer

“Because they switched our residential energy but forgot to switch our business meter over and by the time the next account arrived and I then contacted them, their initial offer was not available.” Business Consumer

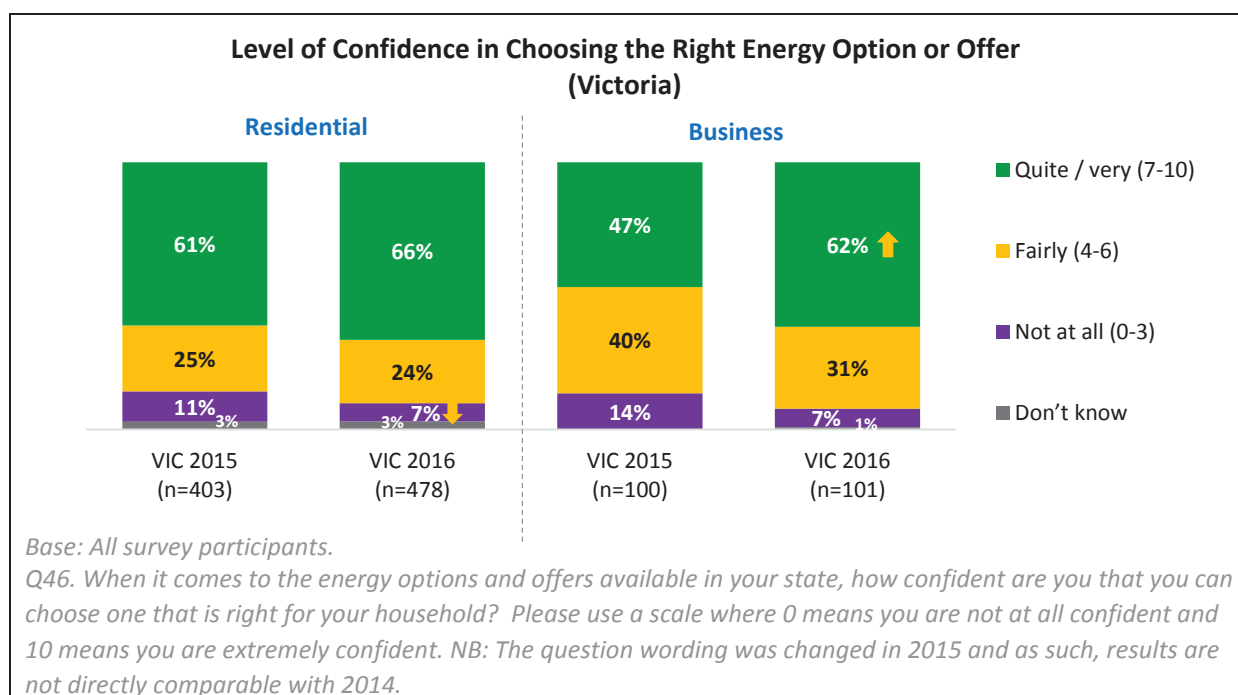
Increased consumer confidence in finding the right information to choose a suitable energy plan

Confidence in finding the right information to choose a suitable energy plan increased significantly among consumers in 2016, with two thirds (66%) of residential consumers giving a high confidence rating of 7 or more out of 10, up significantly from 58% in 2015. The same proportion of business consumers were quite or very confident in finding the right information (66%, which is significantly higher than the level of 50% in 2015).



The majority of consumers were highly confident they could choose the right energy option or offer

Around two thirds of residential consumers were highly confident they could choose the right energy option for their household; 66% rated their confidence as 7 or more out of 10 in 2016, up from 61% in 2015. A similar proportion of business consumers felt the same way: 62%, up significantly from 47% in 2015. Those with solar panels had significantly higher confidence (61% rating their confidence at 8 or higher compared with 47% of those without them).

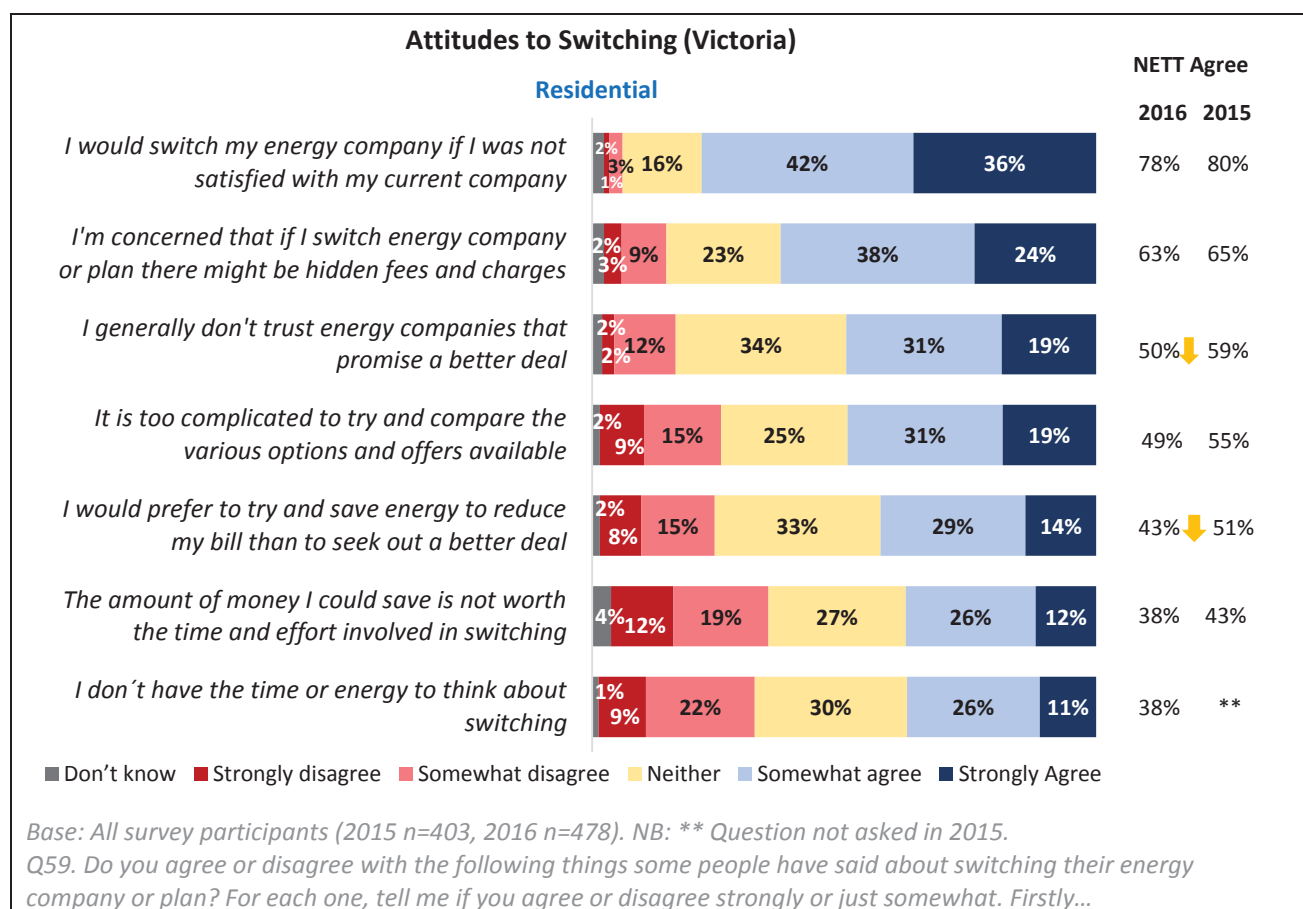


The majority of consumers agreed they would switch if they were not happy with their current company and were concerned about hidden fees and charges if they did switch

To further understand market outcomes and consumer sentiment, participants were asked the extent to which they agreed or disagreed with several statements about switching.

The strongest agreement levels were in line with 2015 findings, for the statements: *I would switch my energy company if I was not satisfied with my current company* (78% residential, 82% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (63% residential, 64% small business).

Notably, in 2016 significantly fewer residential consumers agreed that: *I generally don't trust energy companies that promise a better deal* (nett 50%, down from 59% in 2015) and *I would prefer to try and save energy to reduce my bill than to seek out a better deal* (43% in 2016 down from 51% in 2015).

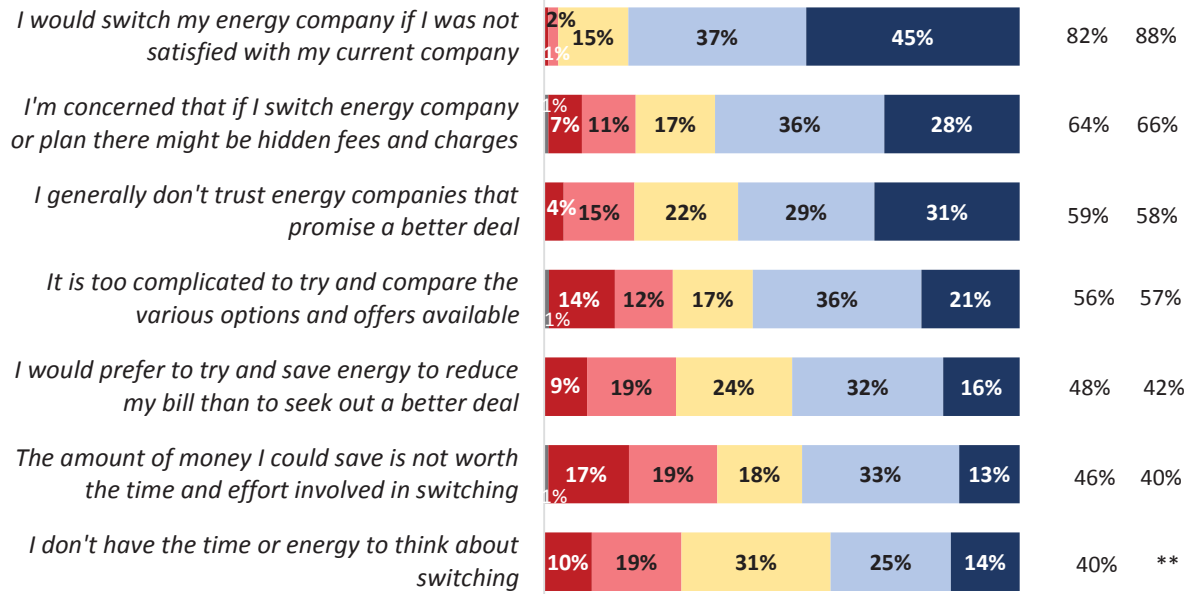


Attitudes to Switching (Victoria)

Business

NETT Agree

2016 2015



■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly Agree

Base: All survey participants (2015 n=100, 2016 n=101).

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...



TASMANIA



NEWGATE
RESEARCH

6 Tasmania

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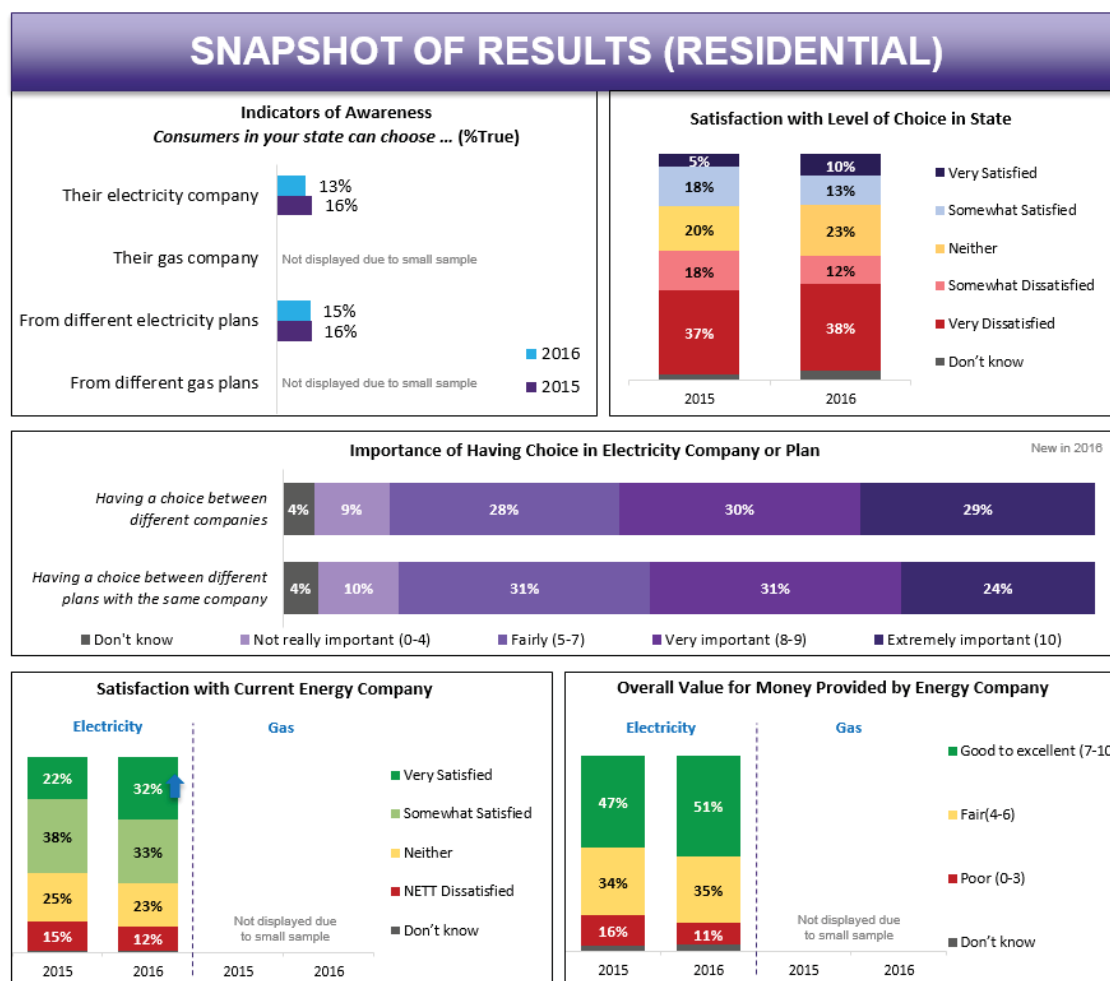
6.1 Snapshot of Results

Satisfaction with the level of market choice remained low in Tasmania in comparison to other NEM jurisdictions with more choice (such as Victoria, New South Wales, the ACT, South Australia and South East Queensland). Most residential consumers were aware they could not choose their electricity company (79%), while only around a quarter of business consumers (24%) were aware they had a choice of more than one company. Having a choice between a number of different electricity companies and different plans and offers was highly important to the majority of consumers (residential: 59% rated this 8 or more out of 10, business: 55%).

Almost half (48%) of residents surveyed rated their confidence in finding the right information to choose a suitable energy plan as 7 or more out of 10 in 2016, compared with 63% across the rest of the NEM, and 37% of businesses (vs. 68% for the NEM). Awareness of any comparison websites remained very low, as did recall of the price comparator website *Energy Made Easy*.

Understandably given the lack of choice in this jurisdiction, confidence in actually choosing the right energy option or offer also remained low. Around 29% of residential consumers and 52% of business consumers were *interested in seeking a better deal*, and a further 9% of residential and 11% of business consumers were *currently looking for a better deal*.

In terms of outcomes, satisfaction with their current electricity provider, and ratings for the quality of customer service provided and value for money improved overall in comparison with 2015. Similar to other NEM jurisdictions, the majority in Tasmania agreed that (if they had a choice) they *would switch if they were not happy with their current company* (residential: 58%, small businesses: 67%), and were *concerned about hidden fees and charges* if they did (residential: 58%, small business: 64%).



6.2 Key Findings

6.2.1 Consumer Activity

Introduction

Tasmania was first included in the Competition Review in 2015. Where possible throughout this chapter, time series data shows changes since 2015. Whilst from 1 July 2014 the Tasmanian market was contestable, there remains only one retailer for residential electricity consumers to choose from (Aurora), with the only option being a regulated standing offer. There are two retailers for business consumers (Aurora and ERM) - with a range of different offers and plans for them to choose from. Two gas retailers are available for both residential and business consumers to choose from (Aurora and TasGas). For these reasons, survey participants were asked fewer questions than those in other jurisdictions.

Results for questions related to gas are not shown due to small sample sizes of consumers with mains connected gas in this jurisdiction (i.e. residential: n=24, business: n=0).

This section of the report details findings about Tasmanian small energy consumers':

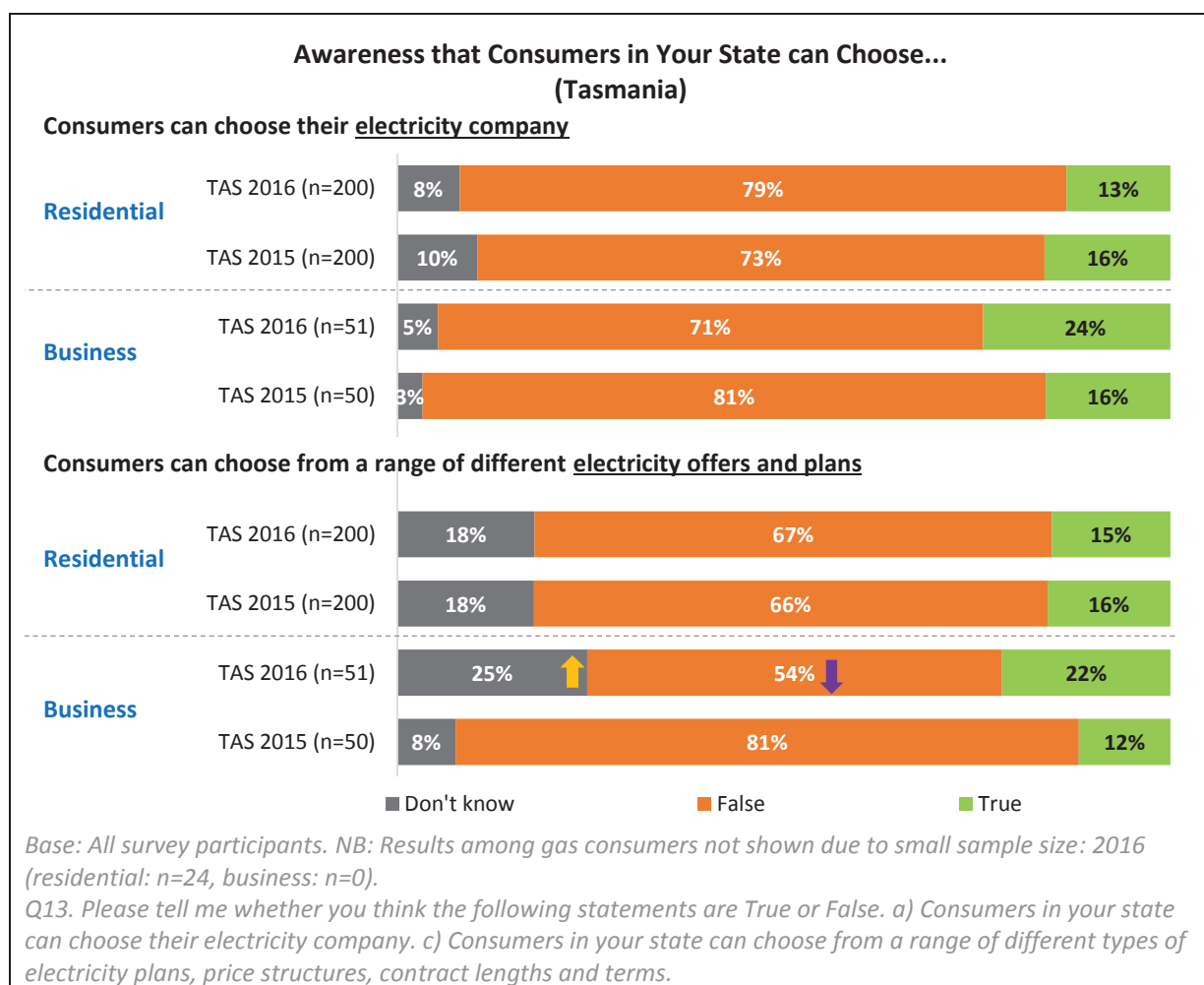
- Knowledge of electricity market choices in Tasmania;
- Importance of having a choice between different electricity companies, and between different options and offers with the same company;
- Preferred information sources for investigating different offers and options;
- Awareness of comparison websites;
- Consumer confidence that they could find the right information and make the right choice for their situation; and
- Interest in seeking a better deal and the dollar savings needed for consumers to seriously consider switching.

The Results

Most residential consumers in Tasmania knew that they didn't have the option to choose a different electricity company, and the majority also knew that they didn't have a number of different offers and plans to choose from, although there was some confusion about the latter

Survey participants were asked a series of true/false questions to measure the level of knowledge about the choices in the energy market in Tasmania. As charted below, consistent with 2015, the vast majority (79%) of residential consumers surveyed in Tasmania were aware they could *not* choose their electricity company, which is slightly higher than in 2015 (73%). The majority of small business consumers thought they didn't have a choice either (71%), with just 24% aware they can choose their electricity company (up slightly from 16% in 2015).

In terms of having a choice between different *electricity offers and options*, two thirds (67%) of residential consumers also knew that they didn't have a range of options to choose from, which is consistent with 2015 (66%). Among *business* consumers there has been a change since 2015, with a significant increase in the proportion who were *unsure* whether or not they had a choice between different options and offers (from 8% in 2015 to 25% this year), and an increase in the proportion who thought they *did* have a choice (from 12% to 22%). However, at least half (54%) still thought this was not the case.

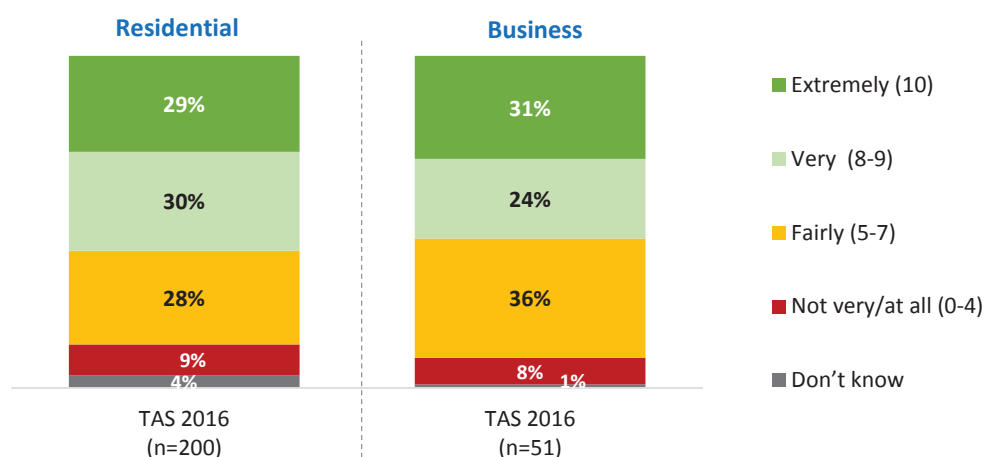


The majority of consumers in Tasmania saw choice in the energy market as important

To understand preferences, survey participants were asked how important it would be to have a choice between a number of different electricity companies. As charted over the page, the majority thought this was highly important: six in ten residential consumers (59%) and a similar proportion of business consumers (55%) rated this 8 or more out of 10. Indeed, around three in ten thought this was 'extremely important', giving this a rating of 10 out of 10 (residential: 29%, businesses: 31%).

They placed a similar but slightly lower level of importance in having a choice between a number of different electricity plans and offers with the same company – i.e. it wasn't seen to be quite as important as having a choice of companies. Just over half (55%) of residential consumers and four in ten business consumers (42%) still rated this 8 or more out of ten.

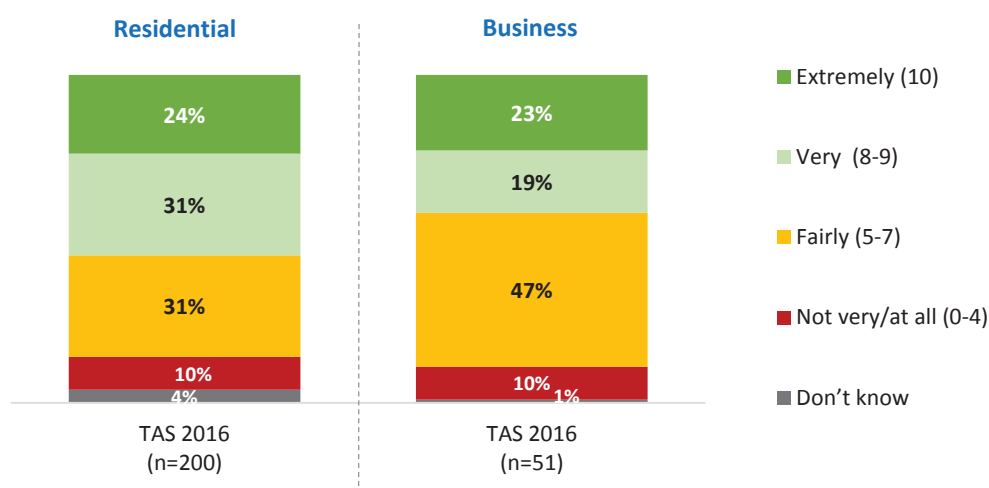
Importance of Choice of a Number of Different Electricity Companies (Tasmania)



Base: All survey participants. NB: Question not asked in 2015.

Q34B. How important would it be for you to have a choice between a number of different electricity companies?

Importance of Choice of a Number of Different Electricity Plans and Offers with the Same Company (Tasmania)



Base: All survey participants. NB: Question not asked in 2015.

Q34C. How important to you is having a choice between a number of different electricity plans and offers with the same company?

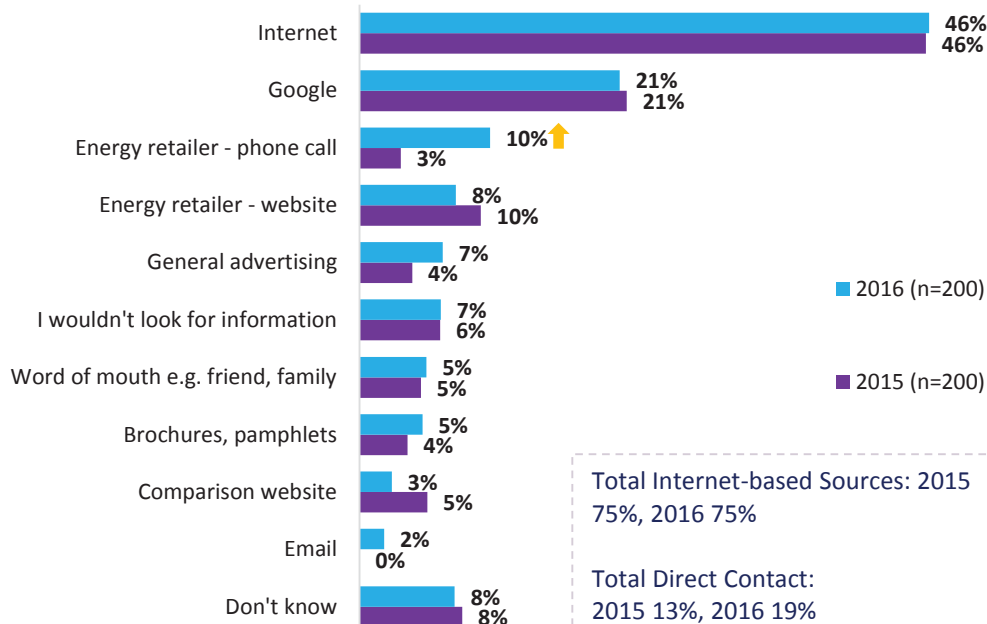
For general information about energy offers, internet-based sources remained the most preferred

All survey participants were asked what information source they would *most prefer to use in the future if they were to investigate their energy options*. The chart below shows that year-on-year the most preferred source has generically been 'the internet', for around four in ten consumers in Tasmania (46% among residents and 38% of businesses surveyed in 2016).

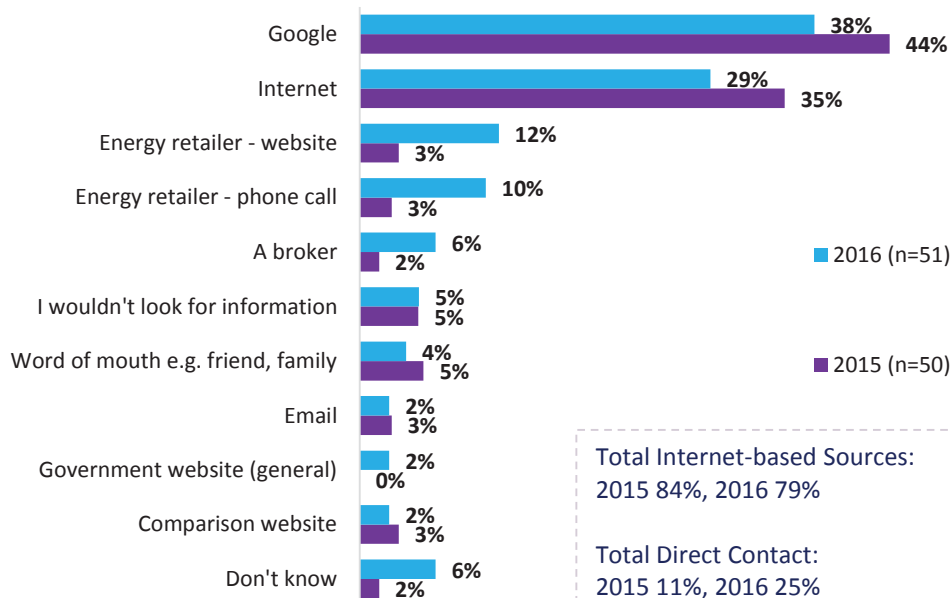
Among residents, there was an increase in preference for telephoning an energy retailer (at 10%, up from 3% in 2015).

Preferred Information Source for Information about Different Retailers or Plans (Tasmania) - Unprompted, Top Mentions 2%+

Residential



Business



Base: All survey participants.

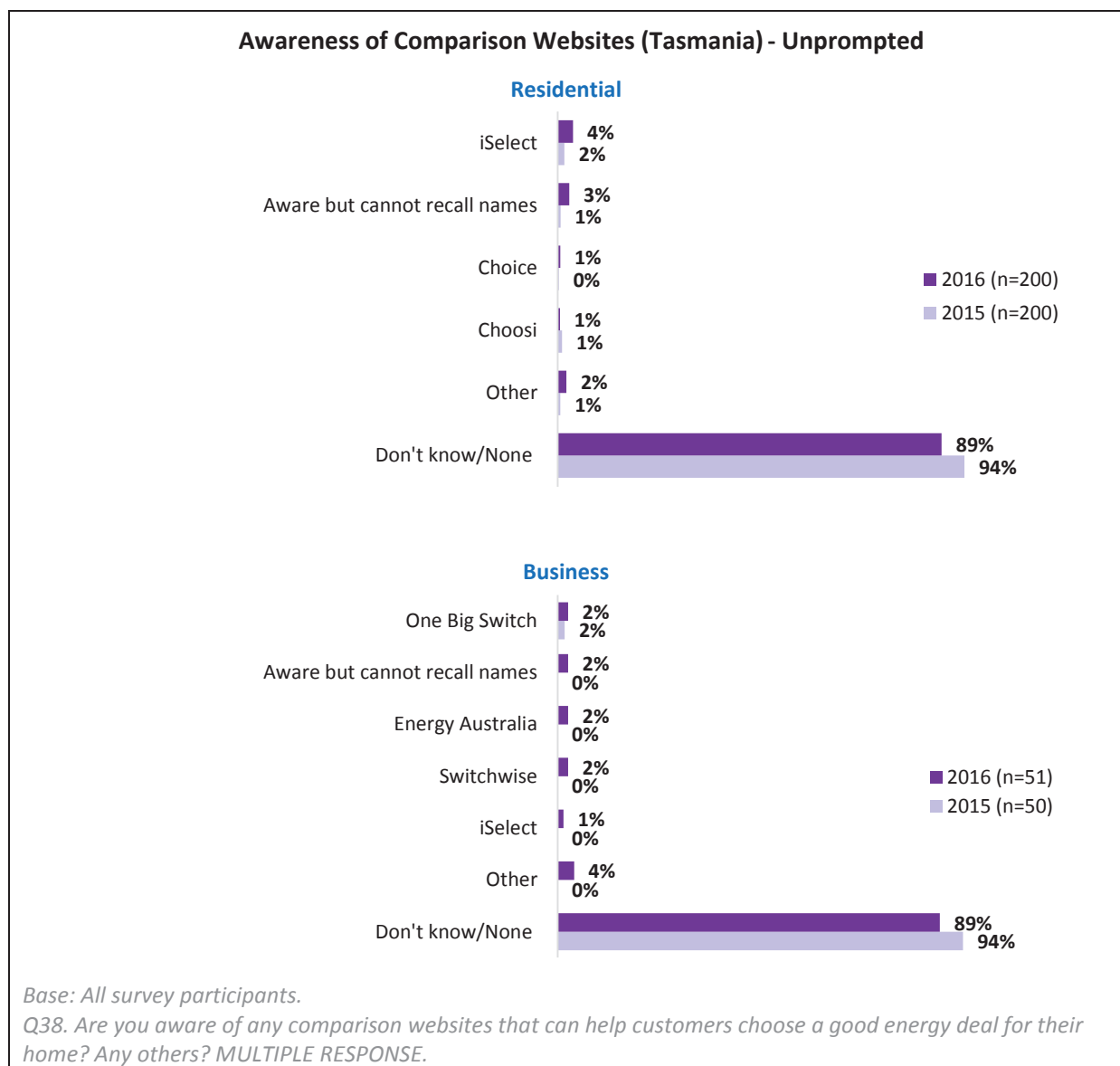
Q37. If you wanted to look for information about different energy retailers or plans, what would be your MOST preferred method or source of information?

Unprompted awareness of comparison websites remained extremely low

Similar to 2015 results, most residential and business consumers were unable to recall the specific names of any comparator websites without prompting: 89% in 2016 and 94% in 2015 among both residential and business consumers. In 2016, a further 3% of residential consumers and 2% of business consumers indicated they were aware of comparator sites but could not cite the names of any.

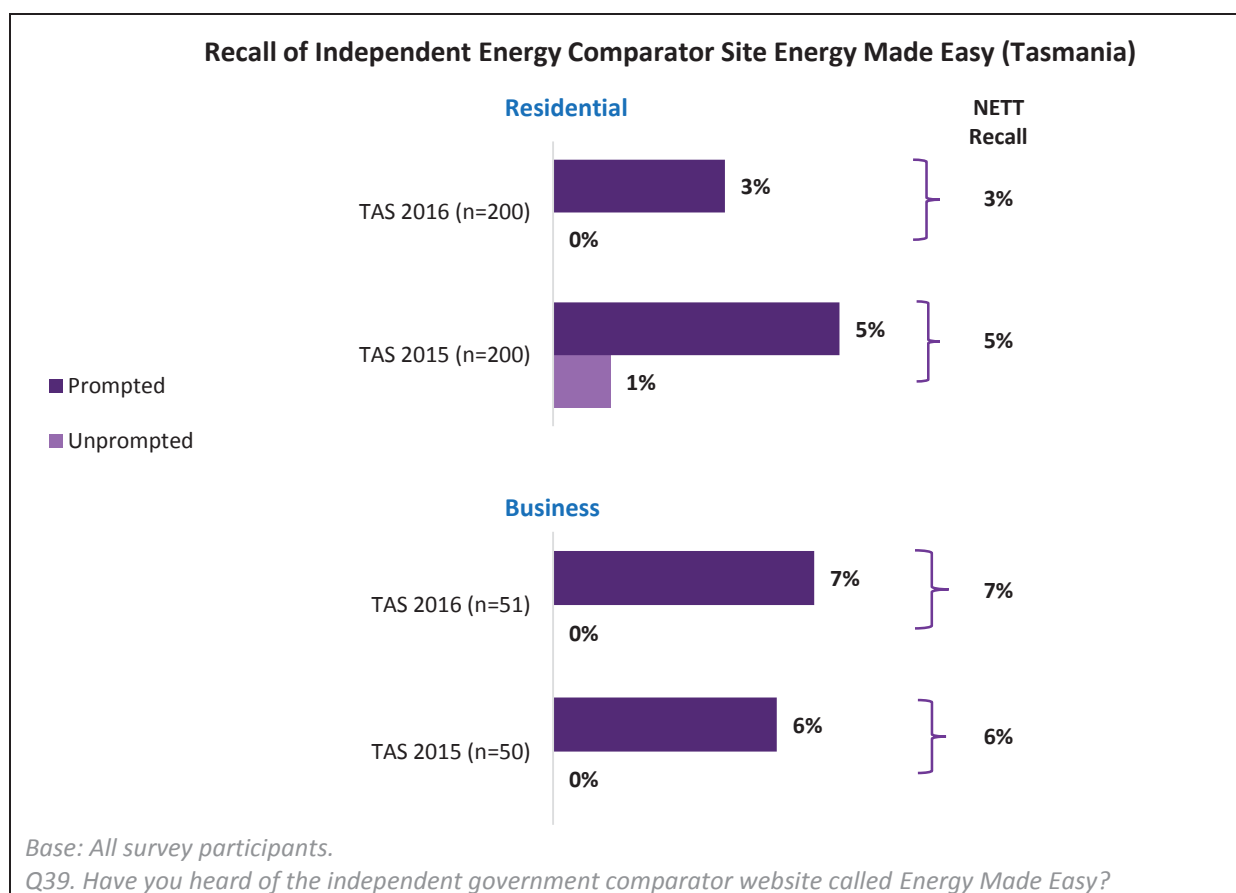
The most commonly mentioned comparator site among residential consumers was iSelect (4% vs. 2% in 2015), with very little recall of any others. Several business and residential consumers made additional comments that it is not relevant to Tasmanian consumers because there is only one company.

Among *business consumers*, while Choice was the most mentioned site in Tasmania in 2015 (3%), followed by Compare the Market (2%), there were no mentions of these sites among business consumers this year. Energy Australia, Switchwise and One Big Switch were the most mentioned sites, with 2% of business consumers mentioning each of these.



Total recall of the government price comparator website Energy Made Easy remained very low

Even when prompted with the name of the Energy Made Easy comparator website, very few participants had heard of it. Among residential consumers, just 3% recalled the name, down slightly from 5% in 2015. Recall was *slightly* higher among business consumers (nett 7% unprompted and prompted recall in 2016 vs. 6% in 2015).



Theoretically, the average amount residential consumers needed to save on their electricity bill in order to seriously consider switching was similar, although slightly higher than in 2015

In order to seriously consider switching their electricity company or plan, on average residents in Tasmania indicated that they would need to save \$235 per year on their electricity bill. This was slightly higher than the average of \$211 in 2015.

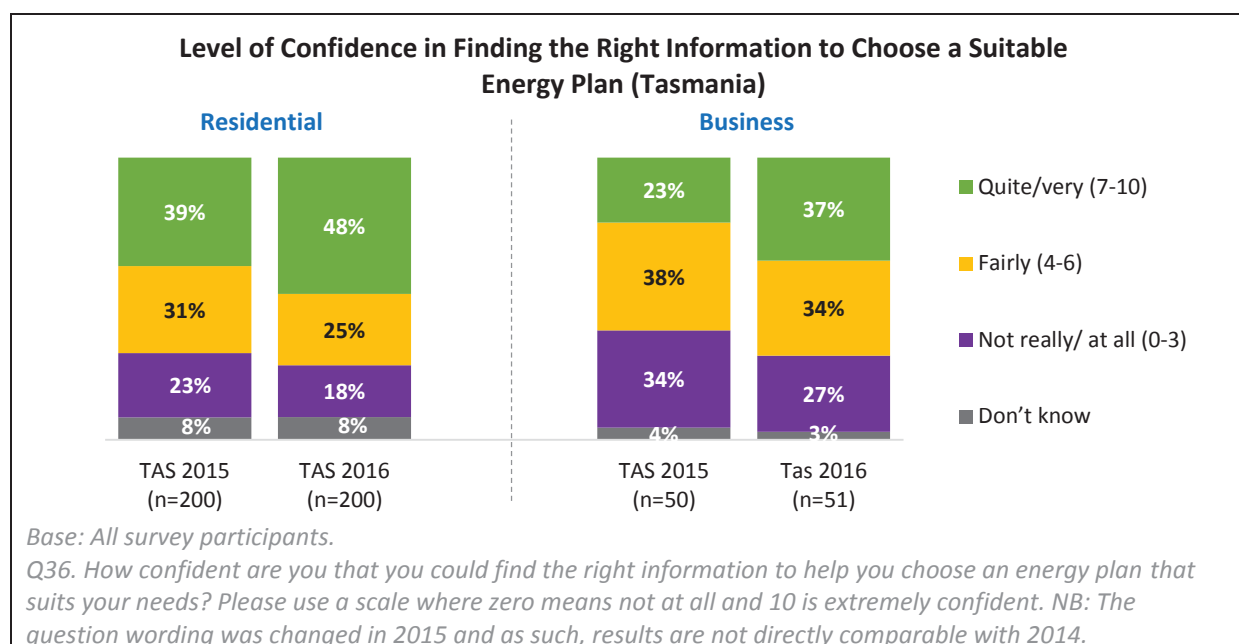
Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	Tasmania Residential	
	2015 (n=200)	2016 (n=200)
Total	\$211	\$235
Last Quarterly Electricity Bill: Low	\$175	\$168
Last Quarterly Electricity Bill: Medium	\$222	\$276
Last Quarterly Electricity Bill: High	\$225	\$247

Base: All survey participants. NB: Results among business consumers not shown due to small sample size: 2016 (n=51). Results among gas consumers not shown due to small sample size: 2016 (residential: n=24, business: n=0). / 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? "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above.

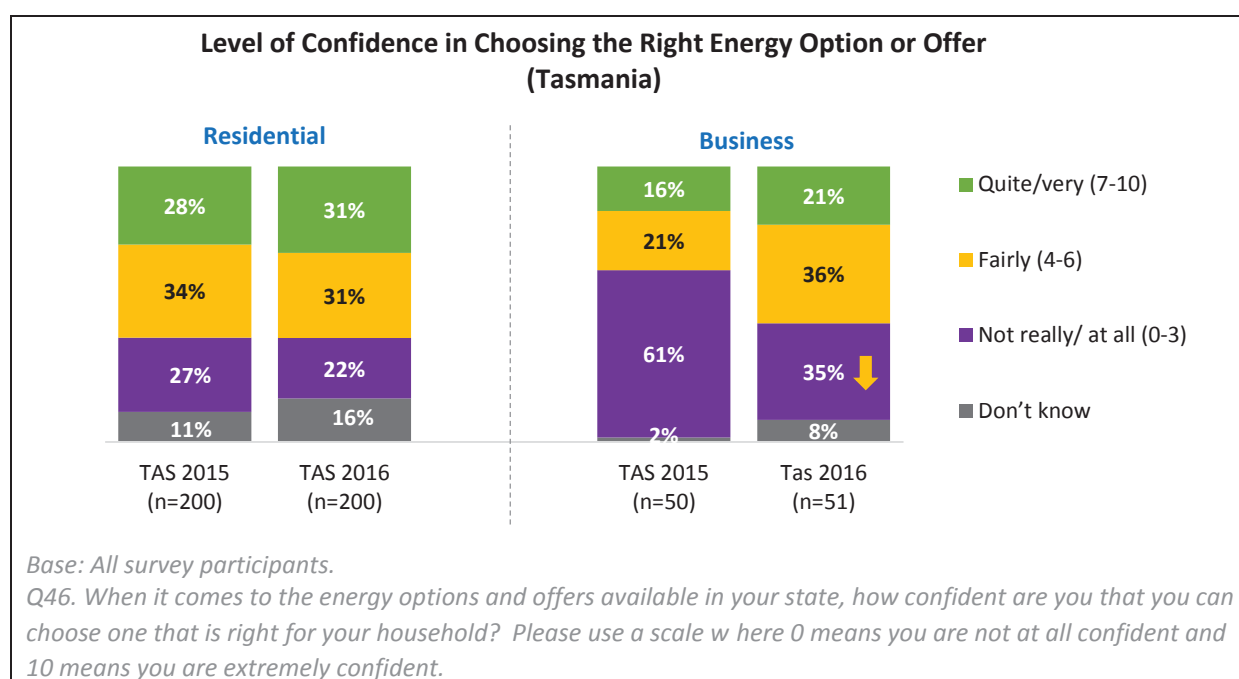
Compared to 2015 consumers in Tasmania were more confident in their ability to find the right information to choose a suitable energy plan, but still less confident than those in other states

Consumers were asked to rate their confidence in finding the right information to choose a suitable energy plan that suits their needs. Despite a lack of choice and lack of awareness of comparison websites, there was a slight increase in confidence when compared to 2015. Almost half (48%) of

residential consumers in 2016 gave a confidence rating of 7 or more, compared with 39% in 2015. Among business consumers this rose from under a quarter in 2015 (23%), to almost four in ten (37%). It is worth noting that confidence remained lower than in other jurisdictions, where 63% of residential consumers across the NEM gave a rating of 7 or more, and 68% of business consumers.



Consumers remained less confident they could *actually choose* the right energy option for their household or business. Only around three in ten residential consumers again rated their confidence 7 or higher in 2016 (31% compared to 28% in 2015), and 21% of business consumers (16% in 2015). Confidence was also lower on this measure than across the NEM (residential: 63%, business: 68%).



Many consumers in Tasmania were interested in switching to a better deal

When asked about their current behaviours in relation to switching to a better deal, three in ten residential consumers were *interested but not currently looking* (29%, compared to 36% in 2015), while around one in ten indicated they were *currently looking for a better deal* (9%, up slightly from 5% in 2015).

Around half of the business consumers were again *interested in looking for a better deal* (52% in 2016, 51% in 2015) and a further 11% were *currently looking for a better deal* (also up slightly; from 6% in 2015).

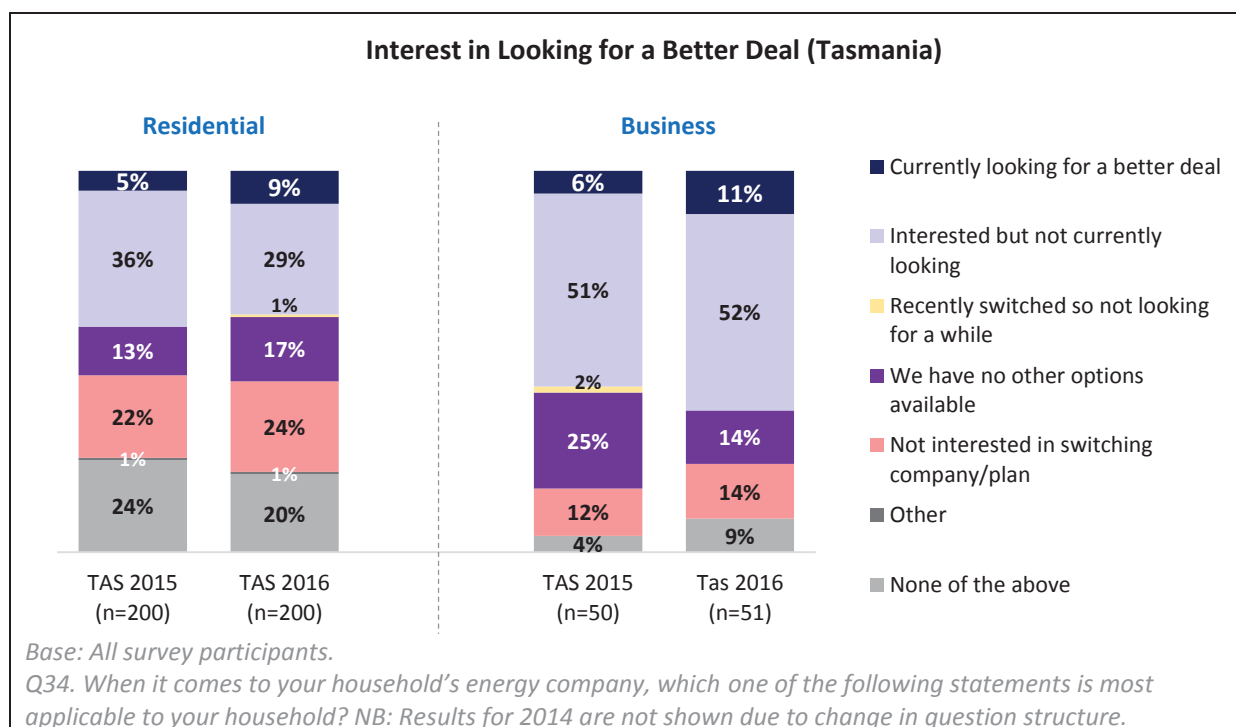
Around a quarter of residential consumers (24%) and 14% of business consumers were not interested in switching their energy company or plan at all, perhaps because of the lack of choice in Tasmania.

A fifth (20%) of residential consumers said ‘none of the above’, likely reflecting the fact that there isn’t anything available for them to switch to.

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:

- Aged under 34 years (net 61% vs. 32% of those aged 35 and older);
- Have children under the age of 18 living at home (64% vs. 29% of those without children);
- Have household incomes of \$50,000 or more (53% vs. 23% of those with household incomes of less than \$50,000);
- University-educated (53% vs. 31% of those without university qualifications); and
- Already have or likely to install storage batteries in the next two years (nett 25% vs. 3% of those who do not have, or are unlikely to, install batteries).

Residential consumers who were *not* interested in switching were more likely to have a relatively small quarterly electricity bill: 47% of those with bills of less than \$300 vs. 17% of those with bills of \$300 or more.



6.2.2 Consumer Outcomes

Introduction

This section of the report details the findings on Tasmanian consumers’:

- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market; and
- Attitudes to switching.

The Results

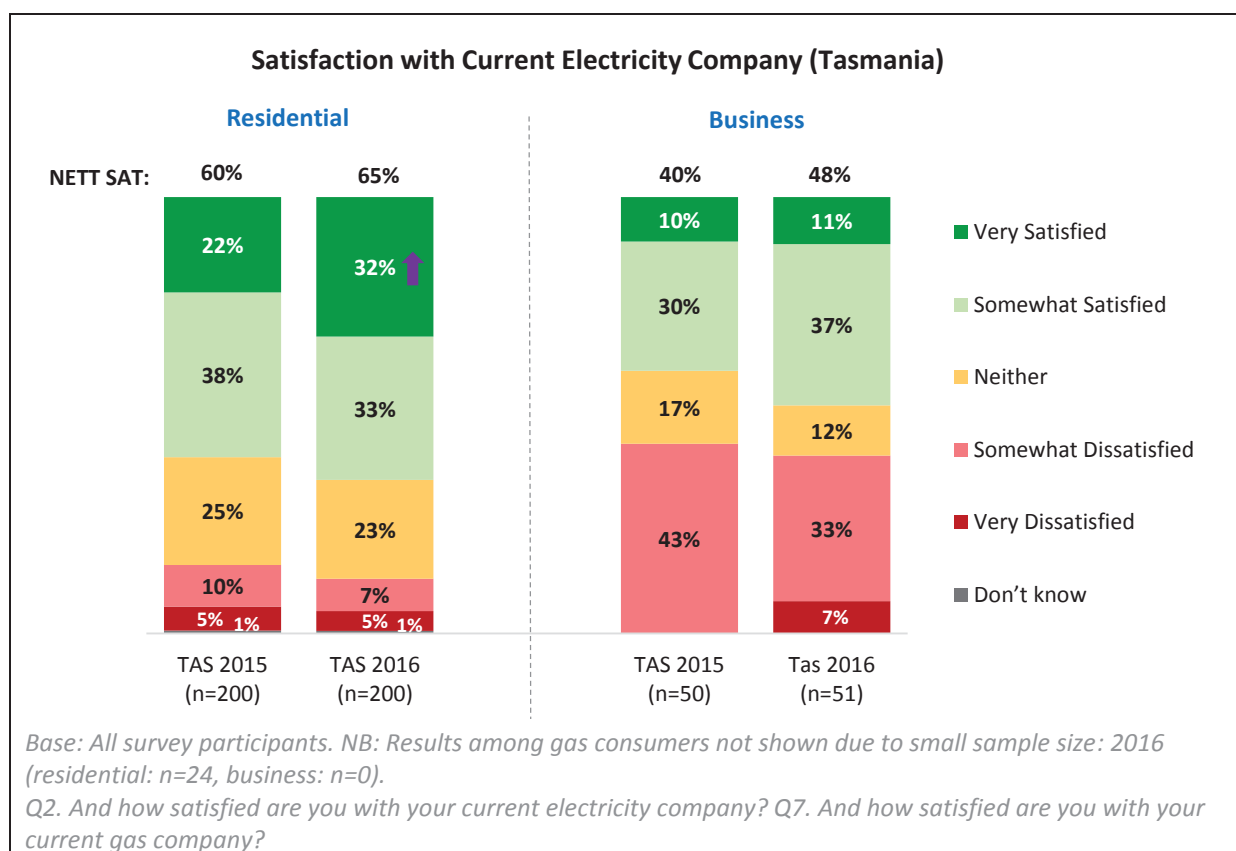
Slight increase in residential satisfaction with their electricity company compared with 2015

As with other jurisdictions, satisfaction with electricity companies remained higher among residential consumers than small businesses in Tasmania.

Two thirds of *residents* were somewhat or very satisfied with their electricity company (nett 65% vs. 60% in 2015). Of note is a significant increase in the proportion who reported being very satisfied (from 22% in 2015 to 32% in this review).

By contrast, fewer than half of the businesses surveyed were satisfied (nett 48% in 2016 vs. 40% in 2015) Indeed they remained far more likely to be dissatisfied, at 41% and 43% respectively.

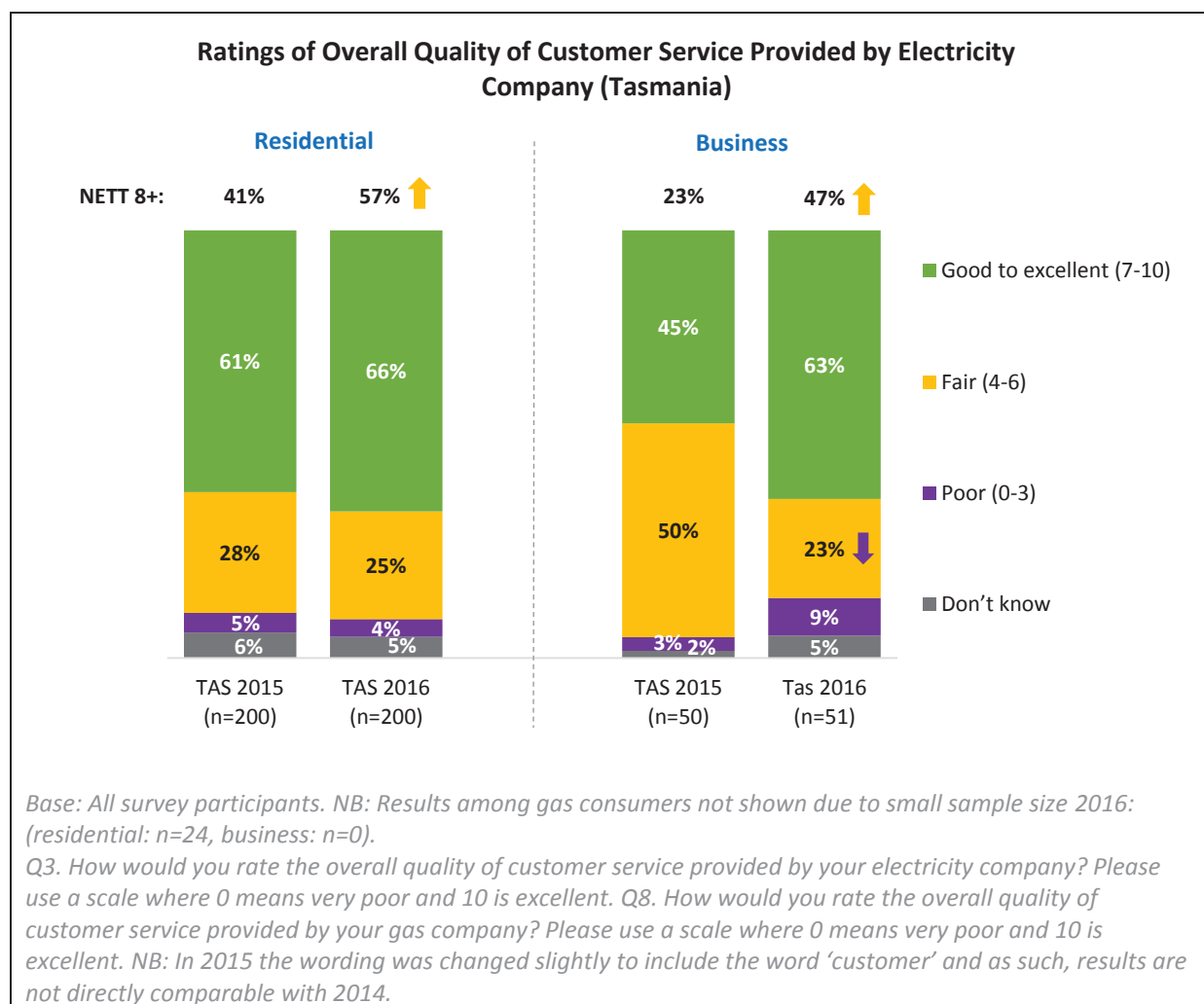
This is significantly lower than satisfaction in other NEM jurisdictions which have a choice of energy companies (73% nett satisfaction among residential consumers and 69% among businesses in 2016).



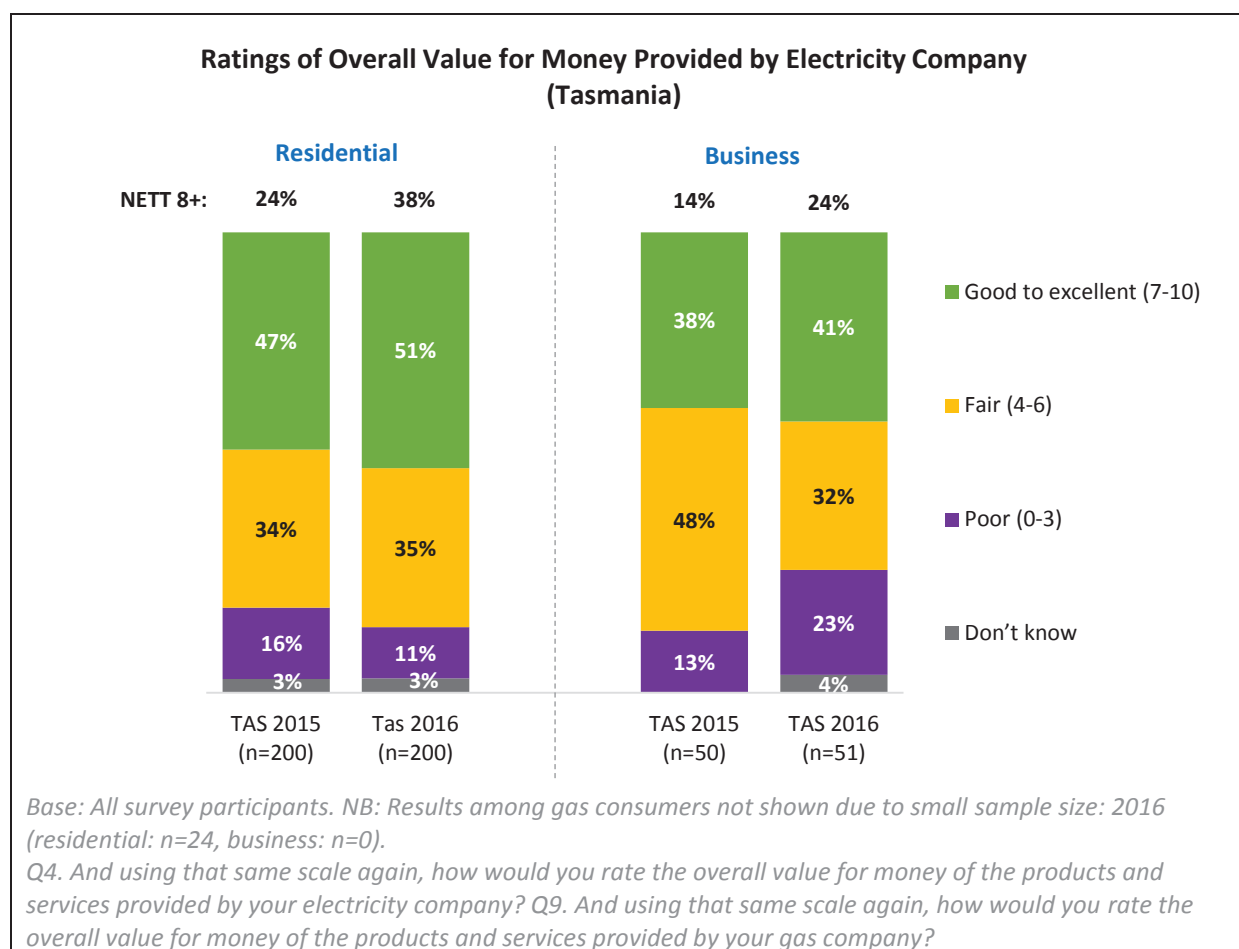
Significant improvements in overall quality of customer service compared with 2015

When asked to provide ratings for the overall quality of customer service provided by their electricity company, ratings among *residential* consumers were significantly higher than in 2015: 57% provided a rating of 8 or higher, up from 41%.

Ratings were also higher among *business* consumers this year: 47% gave a rating of 8 or more vs. 23% in 2015.



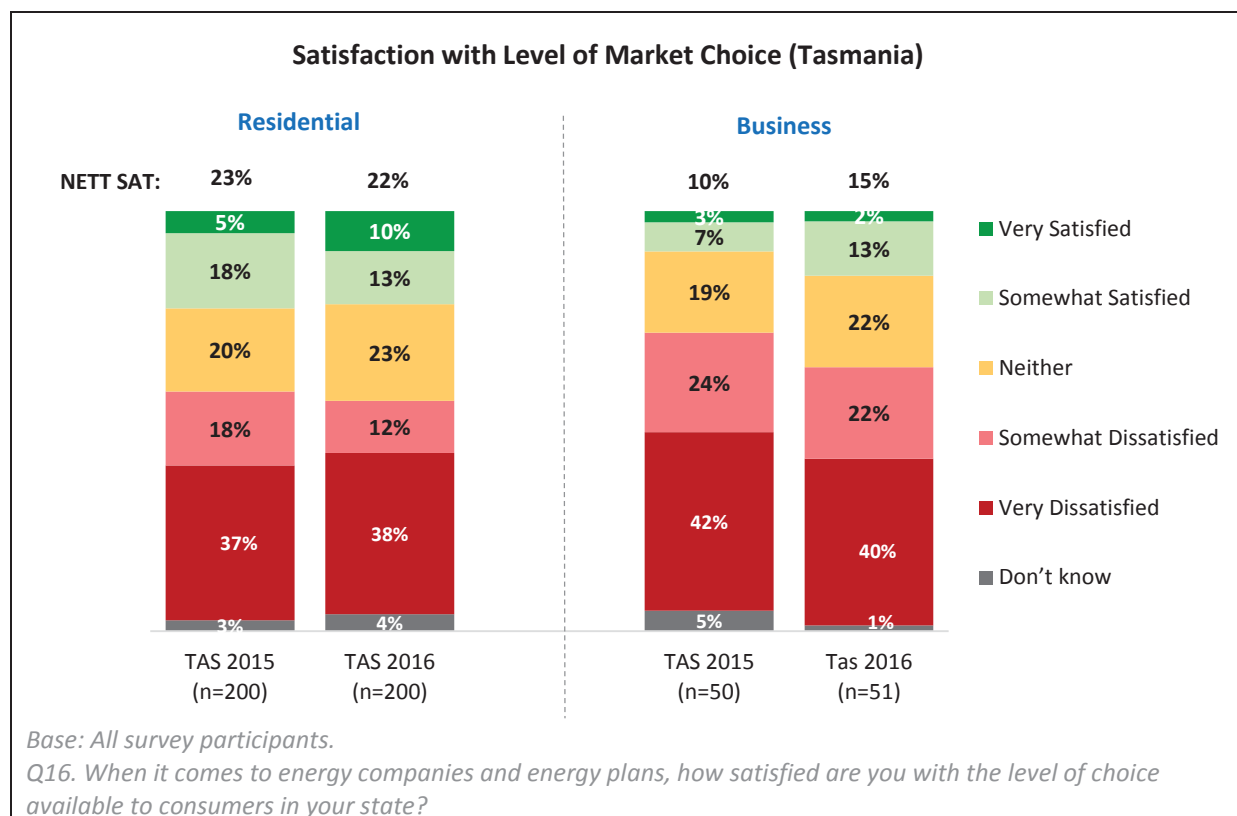
Ratings of value for money provided by their electricity company improved slightly from 2015. Almost two in five residential consumers in Tasmania rated their value for money as 8 or more out of 10 (38%, up from 24% in 2015), as did 24% of business consumers (up from 14% in 2015).



Satisfaction with the level of market choice remained low in Tasmania

Participants were asked to indicate their satisfaction with the level of market choice available to consumers in Tasmania. Results remained broadly consistent with 2015 and significantly lower than in other NEM jurisdictions.

Among residential consumers around one in five were satisfied (22% nett somewhat / very satisfied vs. 64% in other NEM jurisdictions), while 51% were very / somewhat dissatisfied. Among business consumers just 15% were satisfied vs. 65% in other NEM jurisdictions, while 62% were dissatisfied.



The majority agreed they would switch if they were not happy with their current company but were also concerned about hidden fees and charges if they did

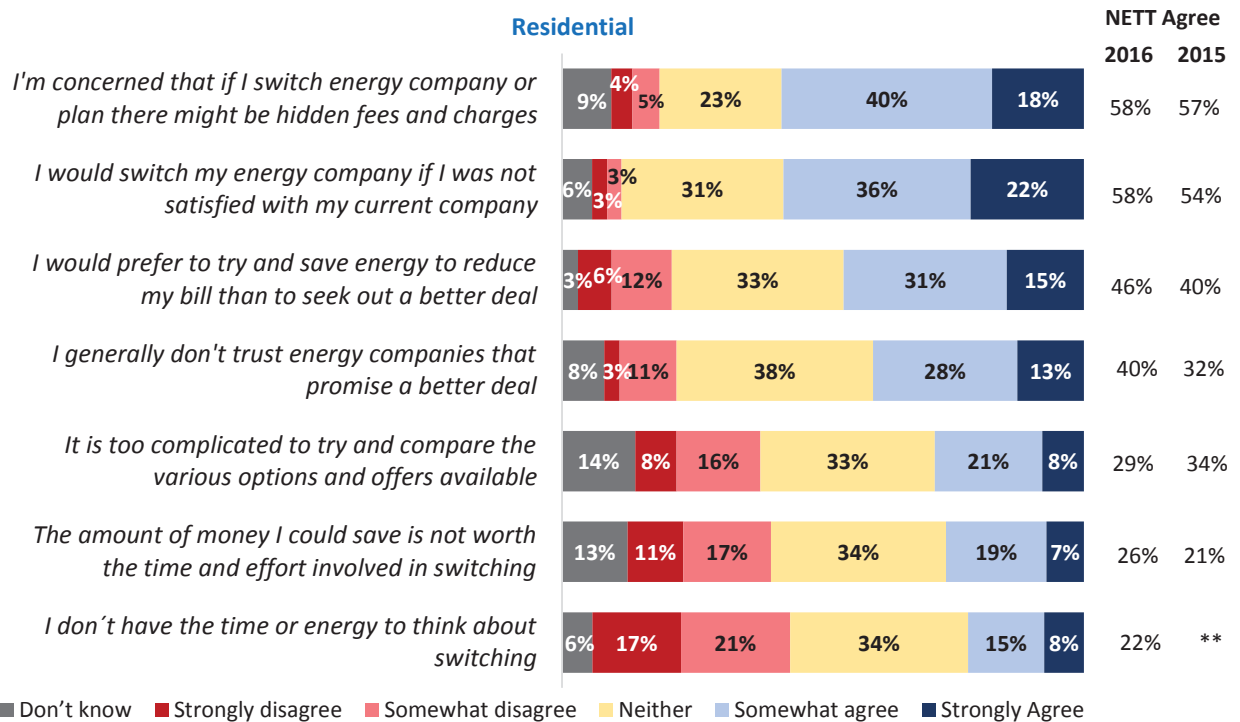
As shown on the charts over the page, to further understand market outcomes and consumer sentiment, participants were asked the extent to which they agreed or disagreed with several statements about switching. Despite the limited options in Tasmania, the strongest agreement levels were in line with findings across other jurisdictions for the statements: *I would switch my energy company if I was not satisfied with my current company* (residential: nett 58% somewhat / strongly agree, business: 67%) and *I'm concerned that if I switch there will be hidden fees and charges* (residential: 58%, business: 64%).

Few residential consumers agreed with the statements: *I don't have the time or energy to think about switching* (22%, and 36% of business consumers) and *the amount of money I could save is not worth the time and effort involved in switching* (26%). Few business consumers agreed with the statement: *It's too complicated to compare the various options and offers available* (34%).

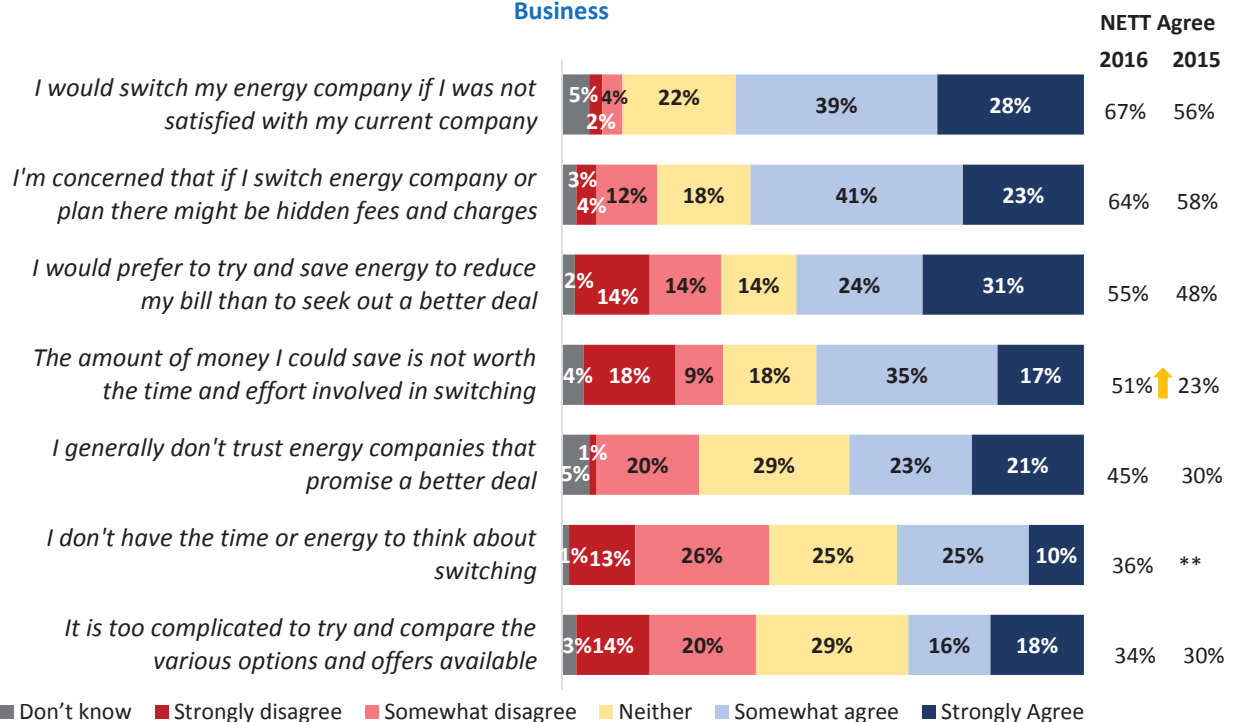
Perhaps reflective of recent decreases in the energy prices, there was a significant increase in agreement among business consumers with the statement: *the amount of money I could save is not worth the time and effort involved in switching* (from 23% to 51% net agree).

Attitudes to Switching (Tasmania)

Residential



Business



Base: All survey participants (residential: n=200 in 2016 and 2015; business: n=51 in 2016 and n=50 in 2015). 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...



SOUTH AUSTRALIA

7 South Australia

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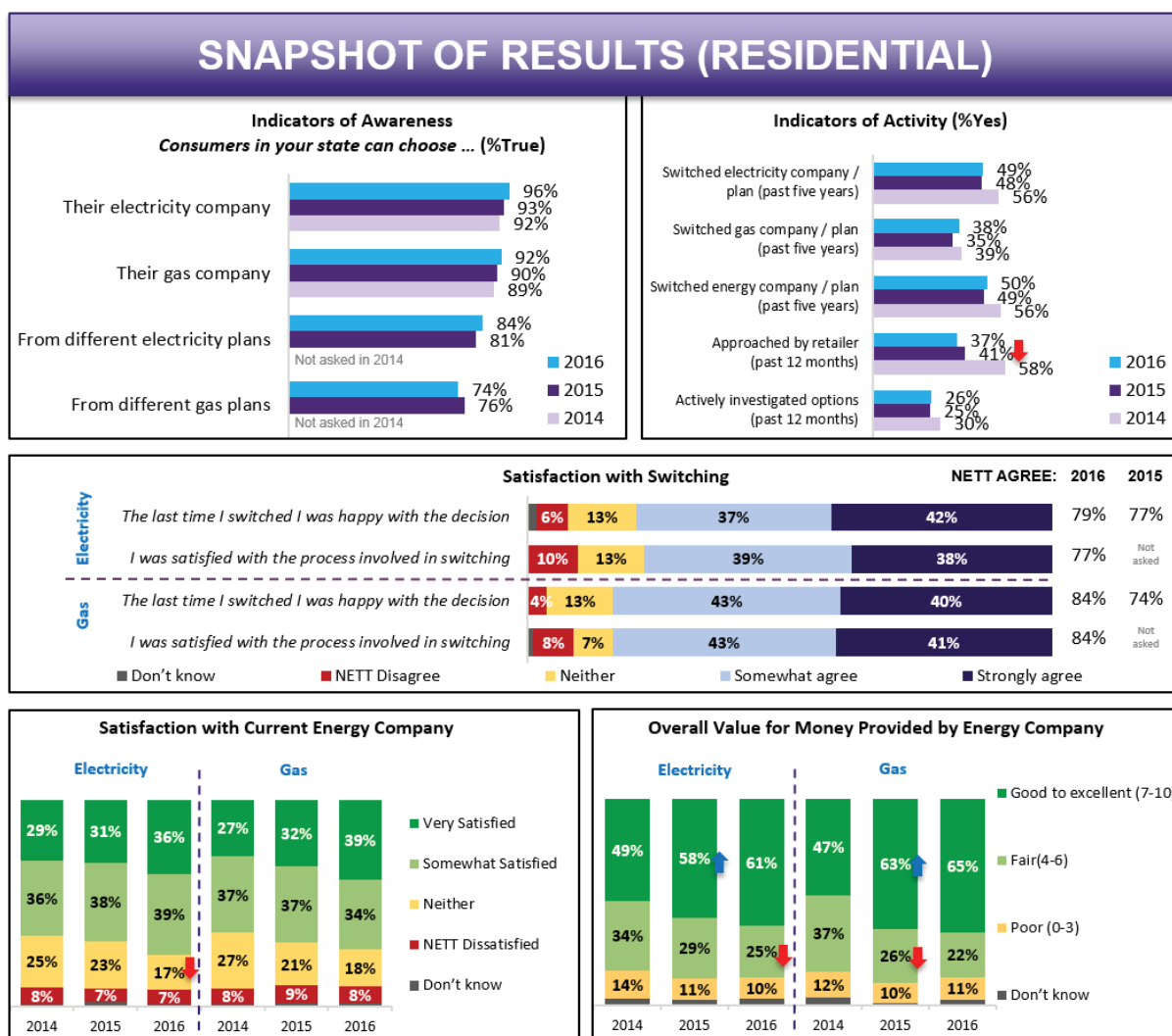
7.1 Snapshot of Results

Awareness of the ability to choose different companies and offers in the South Australian energy market remains high, yet awareness of comparator websites remains low, especially for the independent government site *Energy Made Easy*.

There has been a significant increase in switching rates in electricity companies or plans in the past 12 months among *business* consumers this year (to 31%, up from 13% in 2015), while among residential consumers switching remained steady against 2015 after the slight drop from 2014. Those who switched were most likely to have done so because they were offered a discount or wanted a cheaper price, while those who didn't switch despite looking into their options failed to find a suitable incentive or value proposition. Those who did not engage with the energy market at all claimed they were happy with their current retailer and/or plan and many felt it was too much of a hassle or did not have time. Google and other internet-based sources remained the most used and preferred information sources.

Satisfaction with energy companies and the level of market choice in South Australia increased this year. Most who switched company or plan were again happy with their decision, and the process involved, with more consumers perceiving the process as smooth and easy.

Consumers were also more confident in finding the right information to help them choose a suitable energy plan, and being able to choose the right energy offer for themselves. The levels of interest in looking for a better deal, and consumer attitudes towards switching remained quite stable.



7.2 Key Findings

7.2.1 Consumer Activity

Introduction

This section of the report details findings about South Australian consumers’:

- Awareness and knowledge of their options in energy markets;
- Incidence and time spent investigating energy deals and offers in the last year;
- Reasons for *not* investigating different offers and options;
- Reported ease of comparing different offers and options;
- Used and preferred information sources for investigating different offers and options;
- Awareness of comparison websites – unprompted and prompted;
- Rates of switching energy company, plan and/or deal and the incidence of sales approaches from energy companies;
- Reasons for consumers’ not switching energy company or plan after investigating their options; and
- Drivers: unprompted motivations and the level of importance of various factors in the decision to switch company/plan, and dollar savings needed for consumers to seriously consider switching; and
- Current behaviours – whether currently looking or interested in seeking a better deal.

The Results

The vast majority of South Australian consumers knew they could choose between different energy companies or between different energy offers and plans

As shown in the chart on the following page, consistent with previous years’ results, the vast majority of consumers surveyed in South Australia were aware they could choose their electricity company: 96% of residential consumers and 96% of small businesses. At least nine in ten consumers have known this each year – the result is the highest to date for residential consumers, yet slightly below the 2015 result of 98% for small businesses.

Most also knew they could choose their gas company: 92% of residential consumers, which has increased incrementally from 89% in the benchmark year.

Awareness of being able to choose between different energy *plans, price structures, contract lengths and terms* was also broadly consistent with last year’s result, when it was first included in the survey. Most were aware they could choose different *electricity* plans – i.e. more than eight in ten residents (84% vs. 81% in 2015) and nearly nine in ten small business consumers (88% vs. 92% in 2015).

When it came to gas, three quarters of residential consumers surveyed in South Australia were aware they had a choice between different plans (74% vs. 76% in 2015).

Results for small business *gas* consumers are not detailed here due to small sample sizes of less than n=30 in each year.

Awareness of Ability to Choose Energy Company (South Australia)

Consumers can choose their electricity company



Consumers can choose their gas company

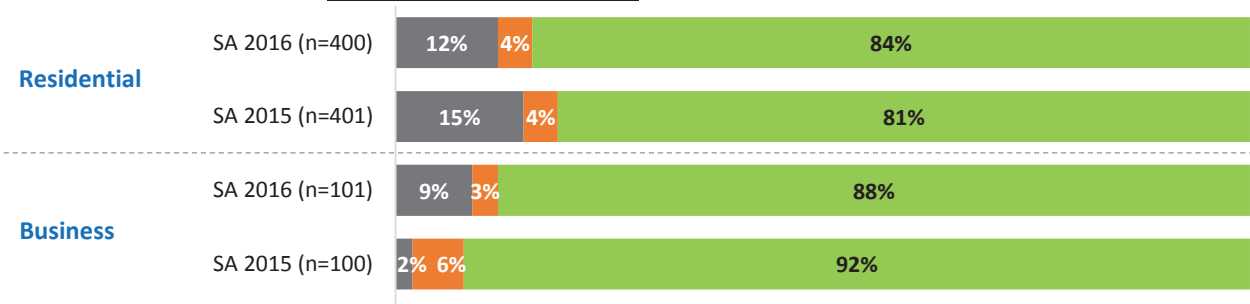


Base: All survey participants. NB: Business gas consumers not shown due to small sample size: 2016 (n=20).

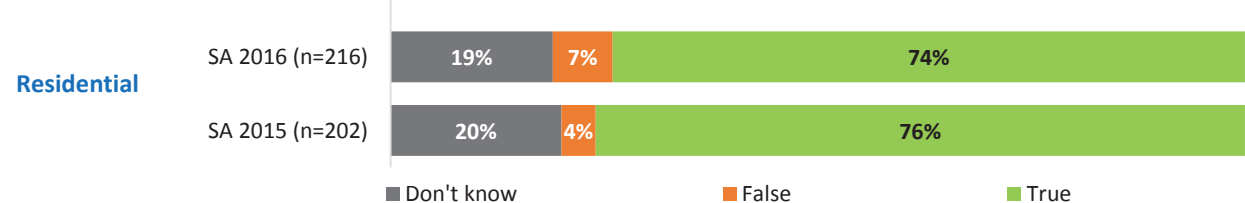
Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state can choose their electricity company. b) Consumers in your state can choose their gas company.

Awareness of Ability to Choose From Different Energy Plans, Offers Etc. (South Australia)

Consumers can choose their electricity plans and options



Consumers can choose their gas plans and options

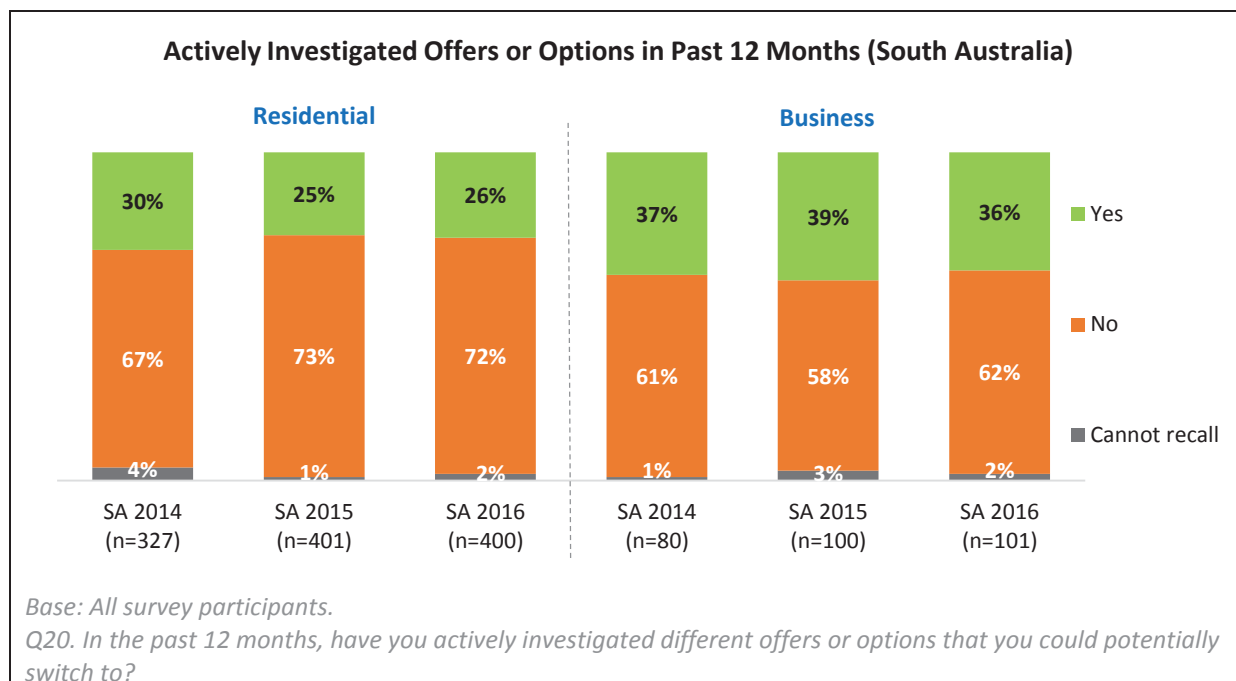


Base: All survey participants. NB: Business gas consumers not shown due to small sample size: 2016 (n=20).

Q13. Please tell me whether you think the following statements are True or False. c) Consumers in your state can choose from a range of different types of electricity plans, price structures, contract lengths and terms. d) Consumers in your state 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.

The proportion of South Australian consumers who had actively investigated energy options and offers in the last 12 months has remained very consistent over time

Broadly consistent with previous years' results, around a quarter of residential consumers (26%) and just over a third of small business consumers (36%) had actively investigated offers or options that they could potentially switch to.



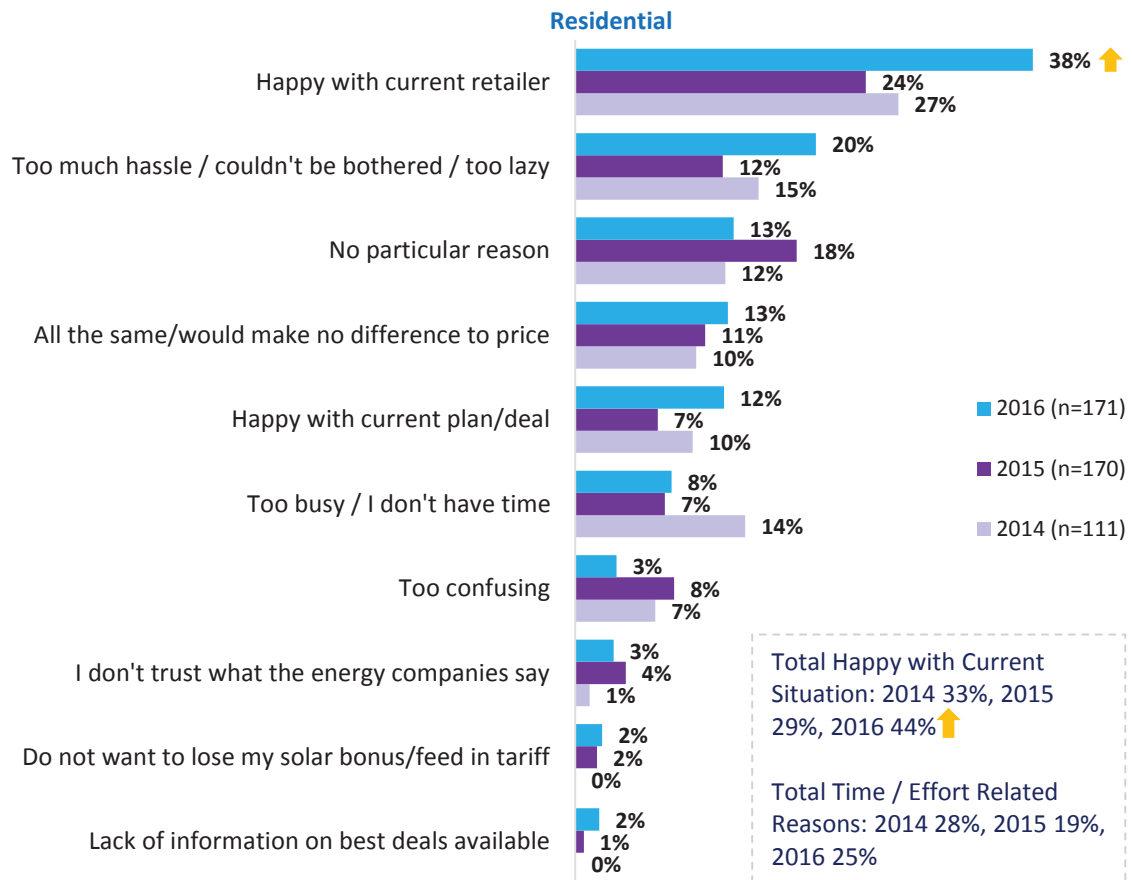
The main reason for consumers not to have investigated options was that they were satisfied with their current retailer, significantly more consumers than in previous years reported this

Among residential consumers who had not investigated options or switched provider or plan, the main unprompted (and subsequently manually coded) reasons were fairly consistent with previous years – as shown over the page.

The most common reason was that they were happy with their current retailer (38%, which is significantly higher than in 2015 at 24%). A further 12% claimed they were happy with their current plan or deal, thus a nett of 44% were happy with current retailer or plan, which is significantly higher than in other years (33% in 2014 and 29% in 2015).

A quarter felt it was too much of a hassle or didn't have the time to investigate (25%). Just over one in ten residents felt that all the options would be the same and make no difference to the price they pay (13%)

Main Reasons for Not Investigating or Switching (South Australia) - Unprompted, Top Mentions 3%+



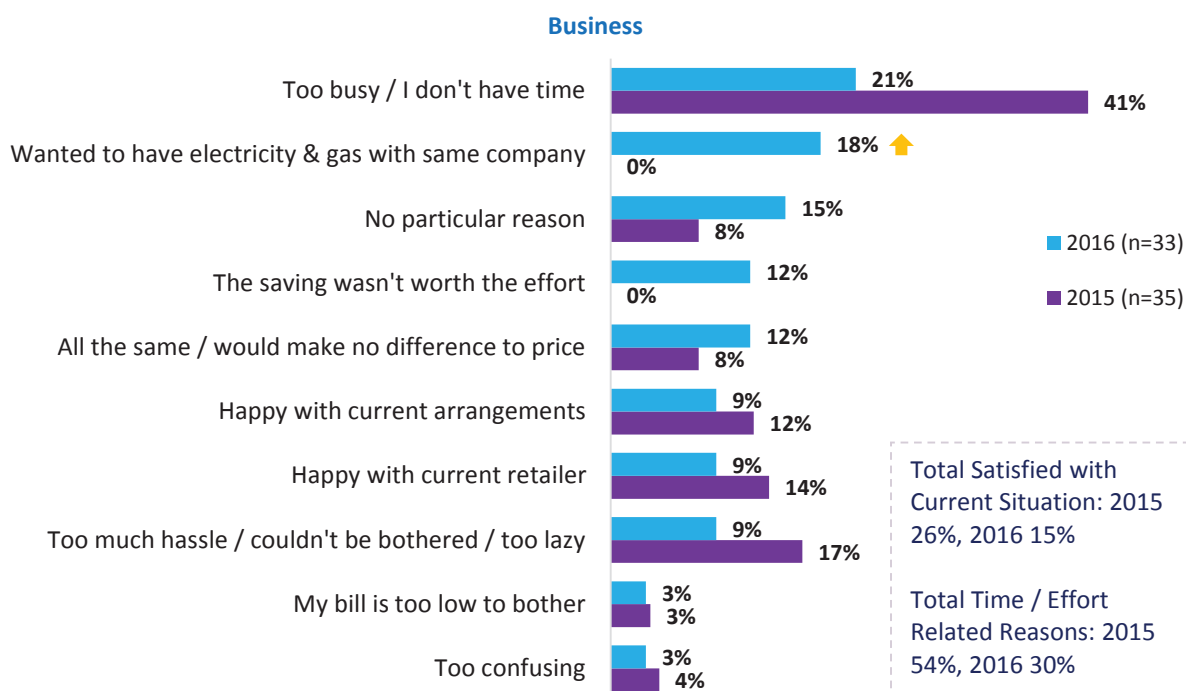
Base: Participants who had not investigated offers and options or switched in the past 12 months.

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.

As the chart over the page shows, while not significant due to small sample sizes, fewer small business consumers claimed they hadn't investigated their options or switched because they were too busy (21% down from 41% in 2015). By contrast, significantly more business consumers were not investigating or switching because they wanted to have electricity and gas with the same company (18% in 2016 versus 0% in 2015). While this is statistically significant, the small sample size potentially inflates the importance of this change and actually represents just n=6 participants. In previous years, as the incidence was low, mentions within this theme were included in 'other responses'.

Contrary to the result for residential consumers, since the benchmark year the proportion of business consumers who claimed they were happy with their current retailer has more than halved, from 25% in 2014 to 9% in 2016.

Main Reasons for Not Investigating or Switching (South Australia) - Unprompted, Top Mentions 3%+

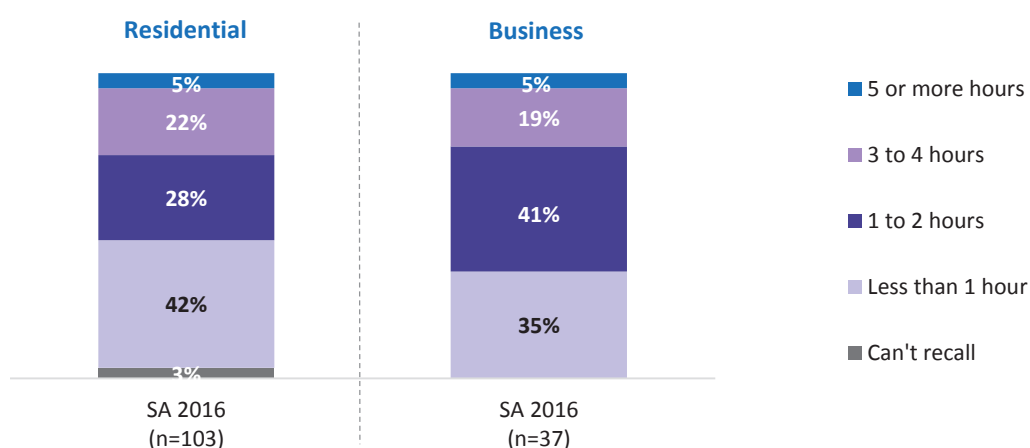


Base: Participants who had not investigated offers and options or switched in the past 12 months. 2014 results not shown due to small sample size (n=16).

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? MULTIPLE RESPONSE.

As with other jurisdictions, in a new question for 2016, the majority of those *who did investigate energy options and offers* estimated that they spent no more than two hours doing so (residential: nett 70%, businesses: nett 76%). Just 5% of residential consumers and small business consumers spent five or more hours investigating.

Time Spent Investigating Offers or Options (South Australia)

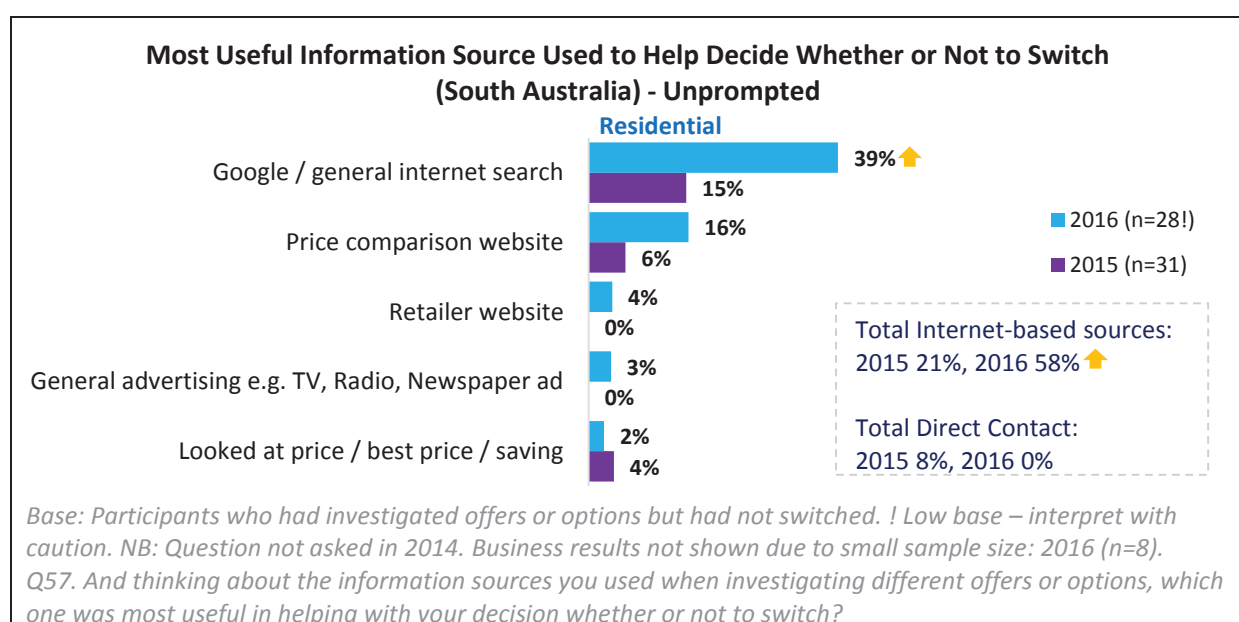
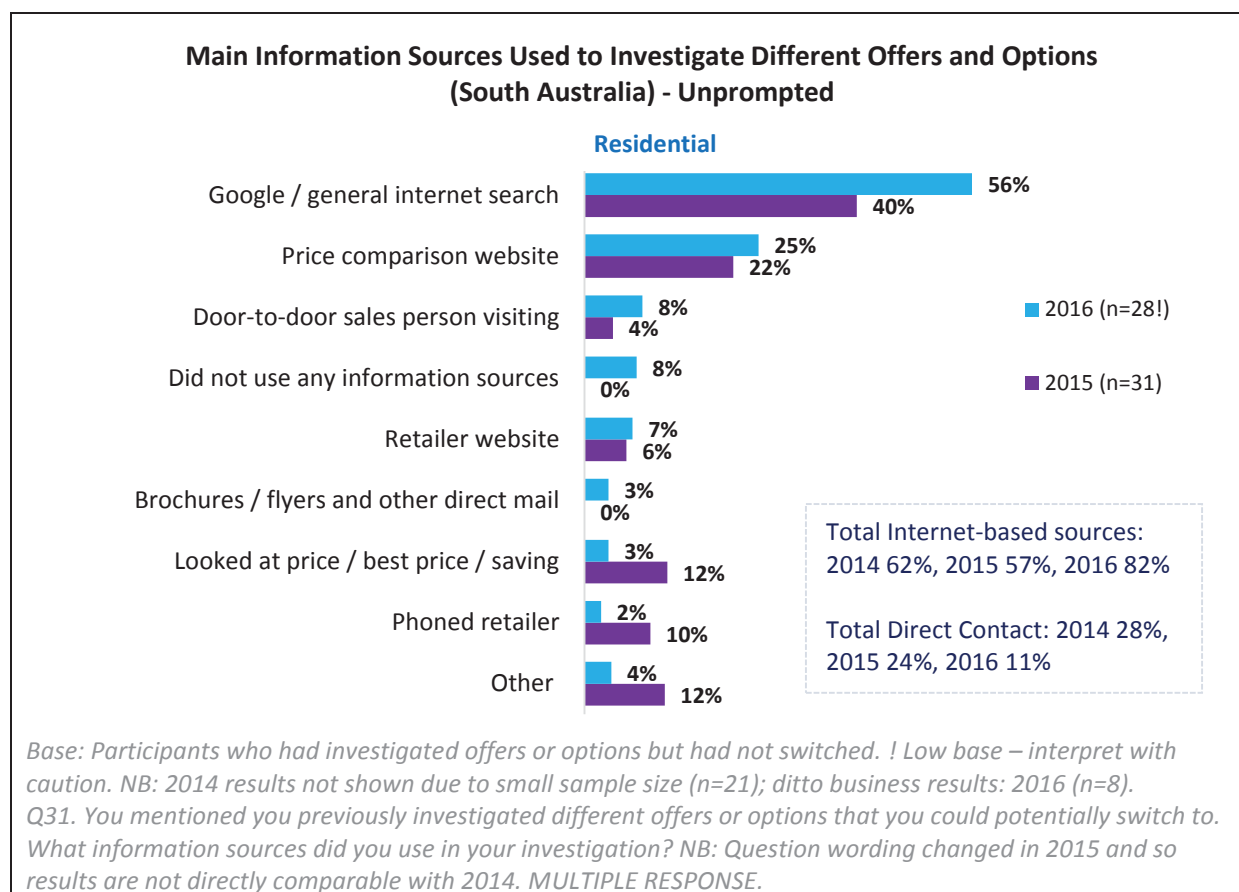


Base: Participants who investigated switching. NB: Question not asked in 2014 or 2015.

Q20b. The last time you investigated energy offers or options, how long did it take you to do this?

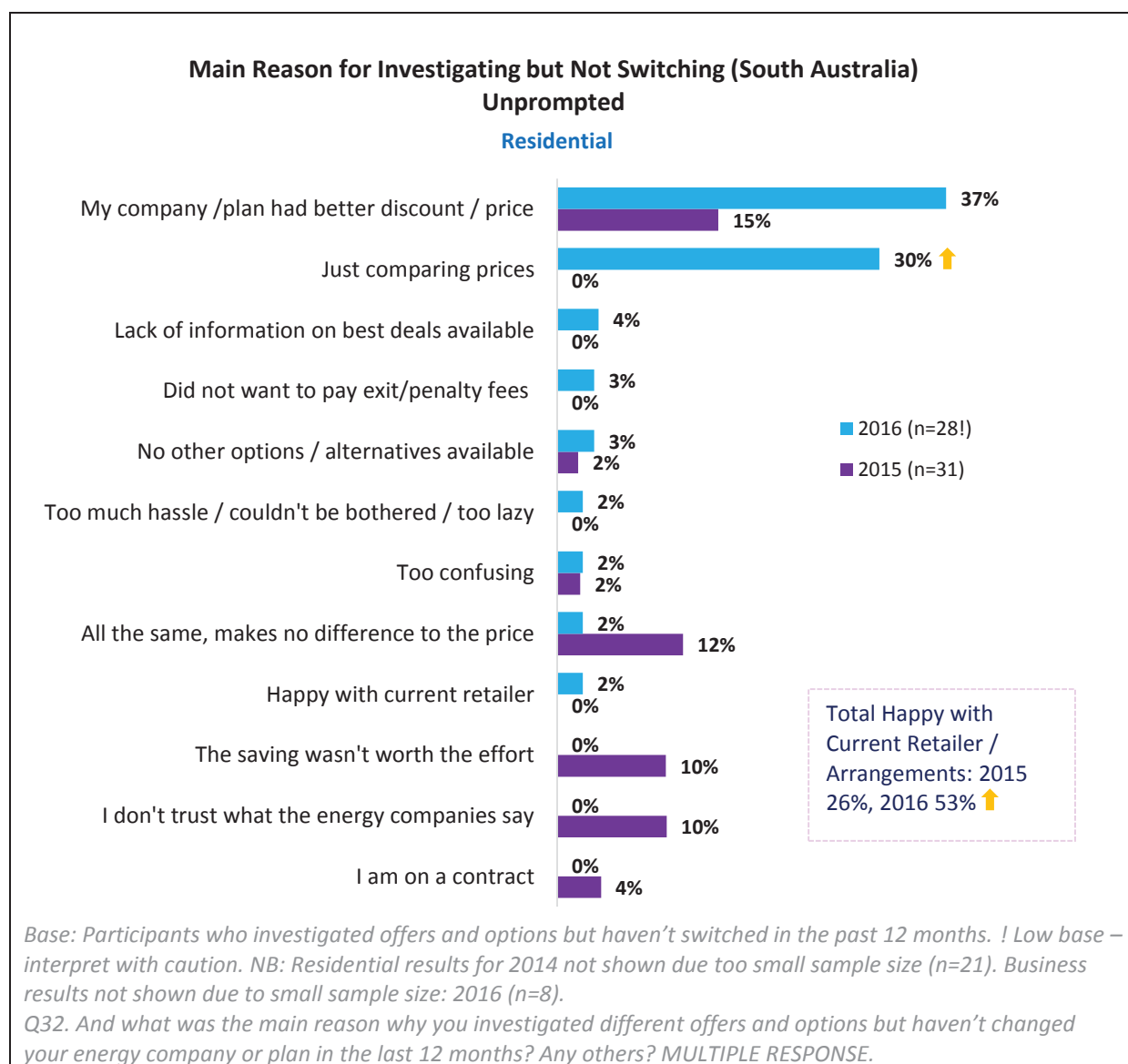
Among *residential consumers who had investigated their options but did not switch*, the main information sources used were again Google or other general internet-based searches (56% vs. 40% in 2015) and price comparison websites (25%, 22% in 2015).

Participants *who had investigated but did not switch* were then asked what the most useful information sources were for helping them to decide what they would do. Google or other internet-based searches again emerged as the most useful (39%, up from 15% in 2015), followed by price comparison websites (at 25%, relatively stable against 22% of mentions in 2015).



The main reason for investigating options but not switching was lack of a better value proposition

Residential consumers who *had investigated different options or offers but didn't switch* were asked their reasons why. As the sample sizes are small, caution should be taken when interpreting these results. The key reasons for *not* switching were that their existing company or plan had a better discount or price (15% in 2015 up to 37% in 2016) or because they were just comparing prices (0% in 2015, 30% in 2016). While this is statistically significant, the small sample size potentially inflates the importance of this change and actually represents just n=8 participants. In previous years, as the incidence was low, mentions within this theme were included in 'other responses'.

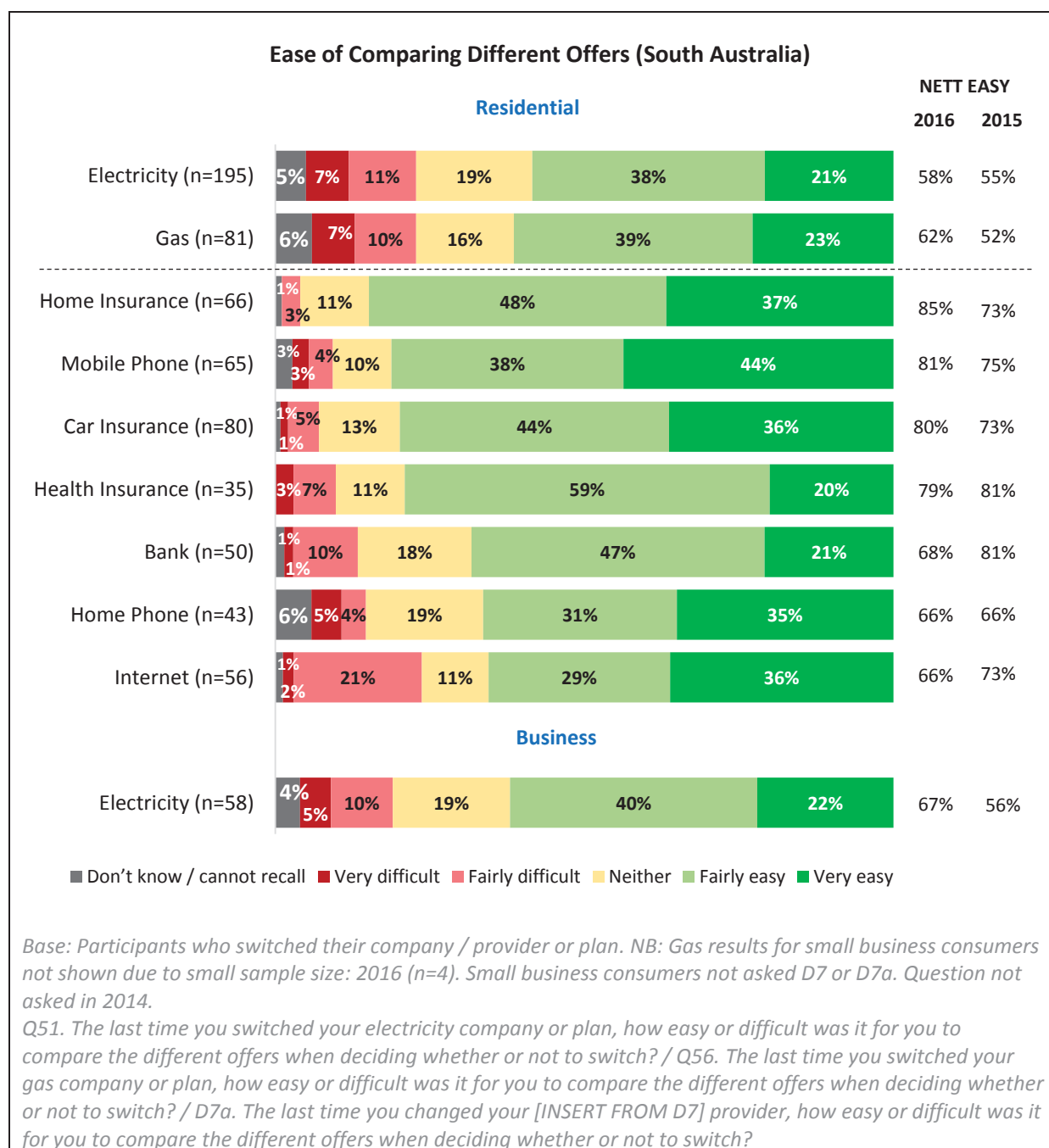


The majority of consumers who had switched energy company or plan found it easy to compare electricity and gas offers - but not as easy as it was for those who had switched other services

Those who had switched electricity or gas company or plan in the last five years were asked how easy or difficult it was to compare the different offers. For benchmarking purposes, participants who has switched other types of services were also asked how easy or difficult it was to compare offers in those markets.

Around six in ten residential consumers found it fairly or very easy to compare electricity (58%) or gas (62%) offers. This was fairly consistent with 2015 when the question was first asked; at 55% and 52% respectively. As was the case in 2015, consumers found it more difficult to compare energy offers than other services such as home insurance (85% found it easy in 2016), mobile phone (81%), car insurance (80%) or health insurance (79%).

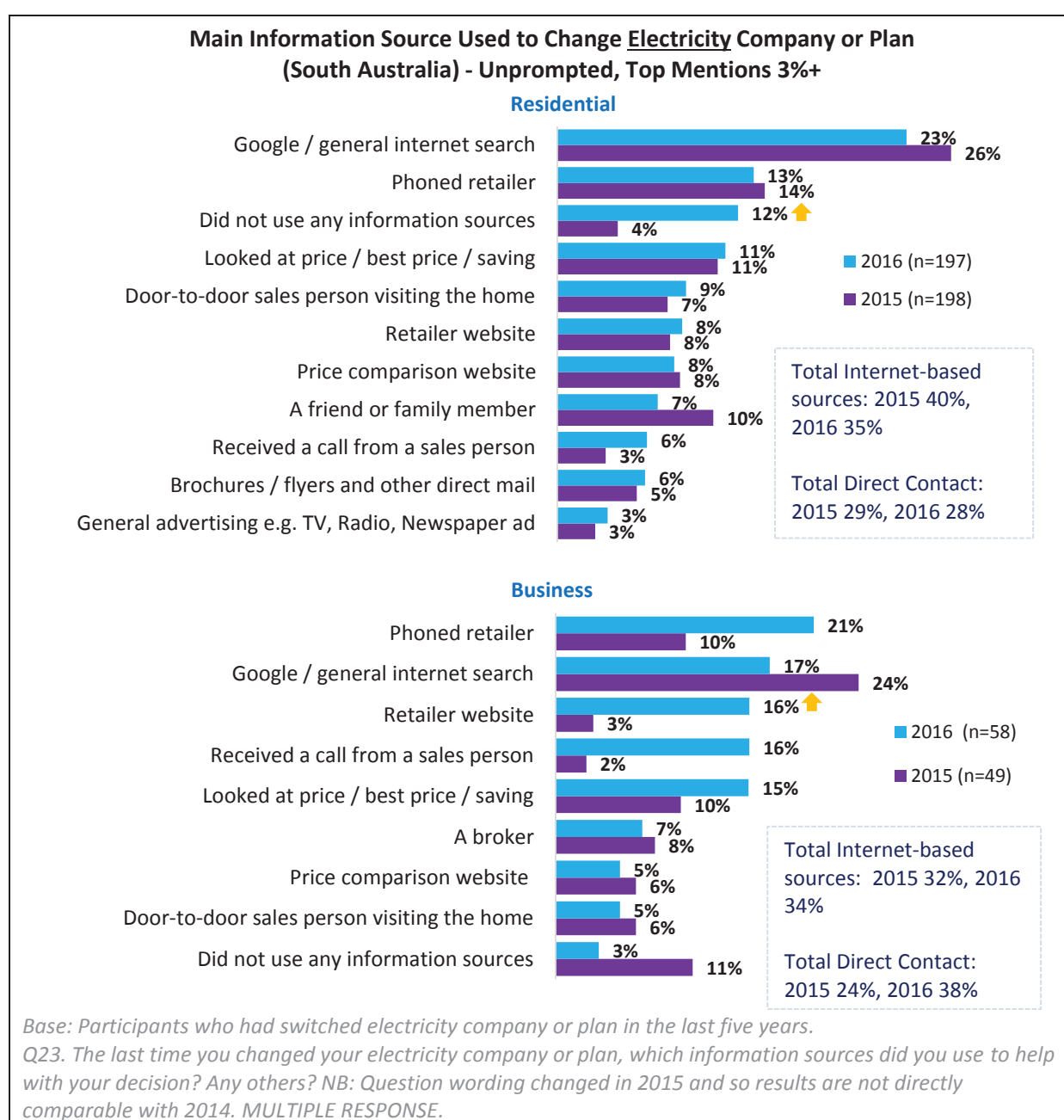
Small business consumers were slightly more likely to find it easy to compare electricity offers than residential consumers (businesses: 67%, residential: 58%) and slightly more so than in 2015 (56%).



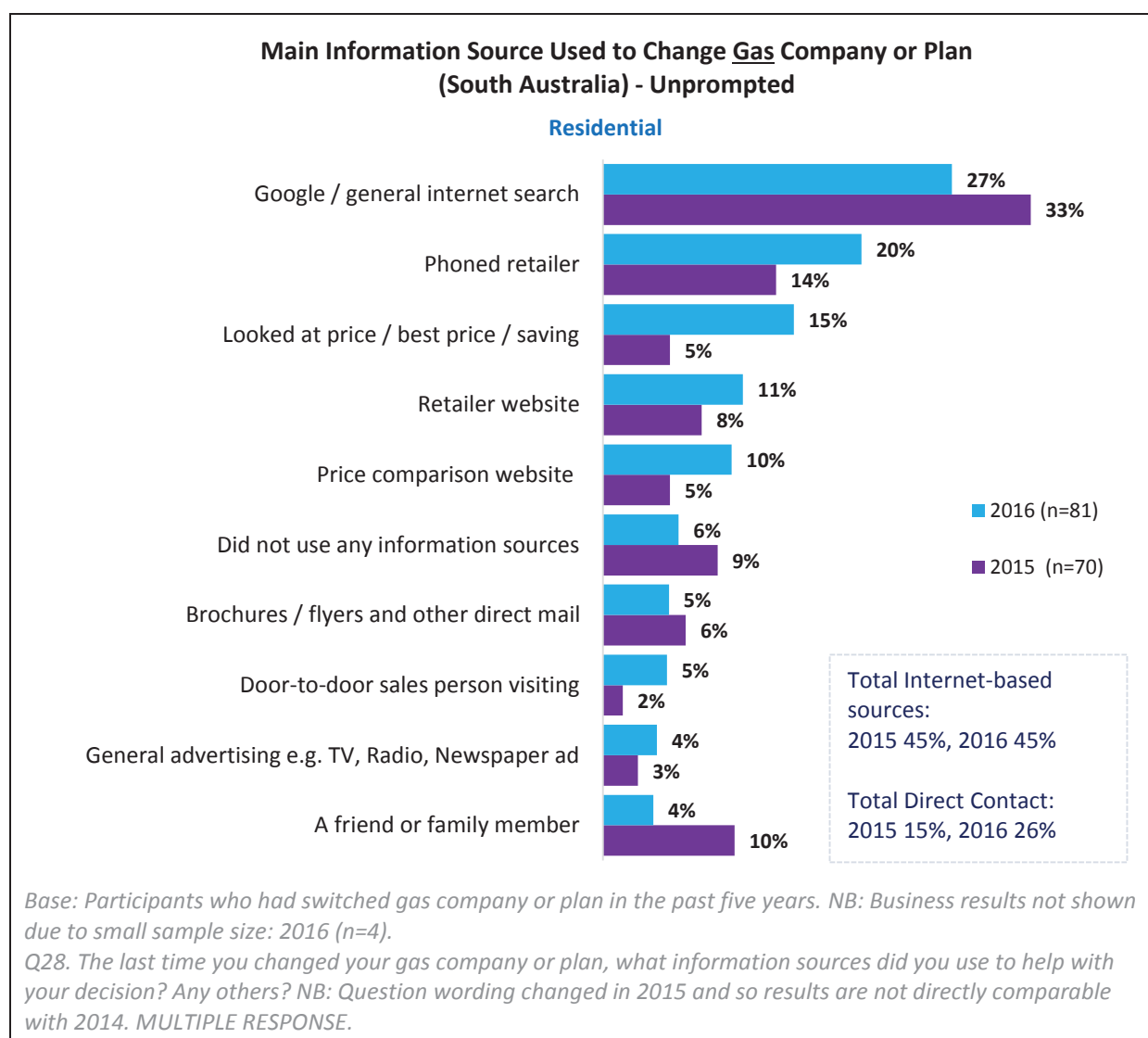
For residential consumers who switched company or plan, the internet remained the most used information source. For business consumers, direct contact with retailers became more popular

Among residents the most used information sources when switching electricity company or plan remained Google / internet-based searches (26% in 2015, 23% in 2016) and a phone call to retailers (14% in 2015, 13% in 2016). A significantly higher proportion of residents claimed they didn't use *any* information sources to help with their decision (12% up from 4% in 2015).

Directly contacting a retailer was the most used source among business consumers, up from 2015, though not significantly due to small base sizes (24% in 2015, rising to 38% in 2016). A greater proportion of business consumers relied on information from retailer websites (16%, up significantly from 3% in 2015), a call from a salesperson (16% up slightly from 2% in 2015) or phoning retailers directly (21%, up slightly from 10% in 2015). While Google or other internet-based searches were no longer the *most* commonly used information source for switching (at 17%, down slightly from 24% in 2015) this represents a difference of just n=2 participants from the *most* used (i.e. telephoning retailers), so findings should be interpreted with caution.



Consistent with electricity, the main information sources used by residential consumers to change their *gas* company or plan were Google or general internet-based searches (27% slightly lower than 33% in 2015) followed by making a phone call to a retailer (20%, up slightly from 14% in 2015). These results were broadly consistent with the 2015 survey.



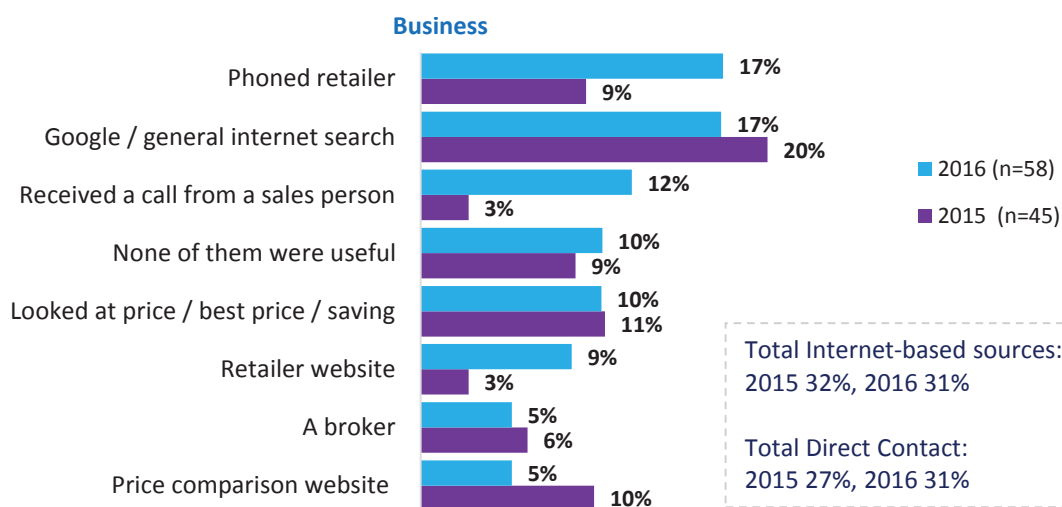
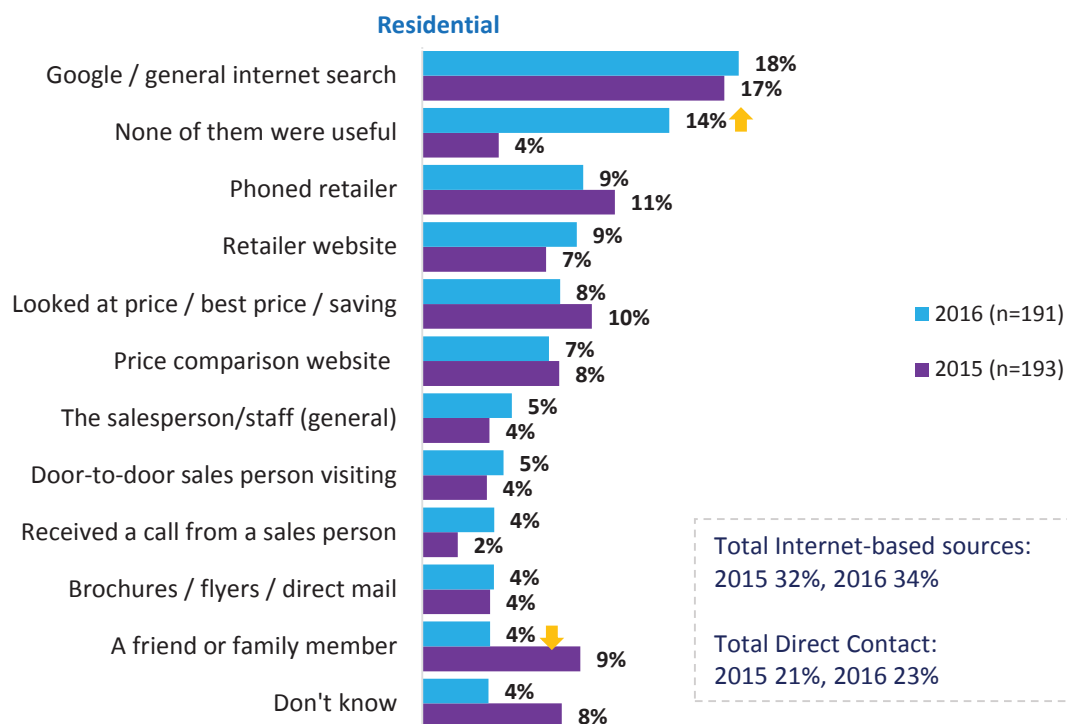
Among those who had switched electricity company or plan, internet-based sources were again considered the most useful, though businesses equally felt this way about telephoning a retailer

As shown in the chart over the page, consumers who had switched an energy company or plan were also asked which information source they thought was *most useful*. Consistent with the most used, internet-based sources remained the most useful (residential: nett 34% vs. businesses: net 31%).

In 2016, a significantly higher proportion of residential consumers found none of the information sources useful in helping with their decision to switch (14%, up from 4% in 2015) and fewer relied on a friend or family member for advice (4% vs. 9%).

In line with the most used sources, for small business consumers, the most useful sources were: a phone call to a retailer (17% up slightly from 9% in 2015) or a Google or general internet search (17%, 20% in 2015). Again results should be interpreted with caution due to relatively small sample sizes.

**Most Useful Information Source Used to Change Electricity Company or Plan
(South Australia) - Unprompted, Top Mentions 3%+**

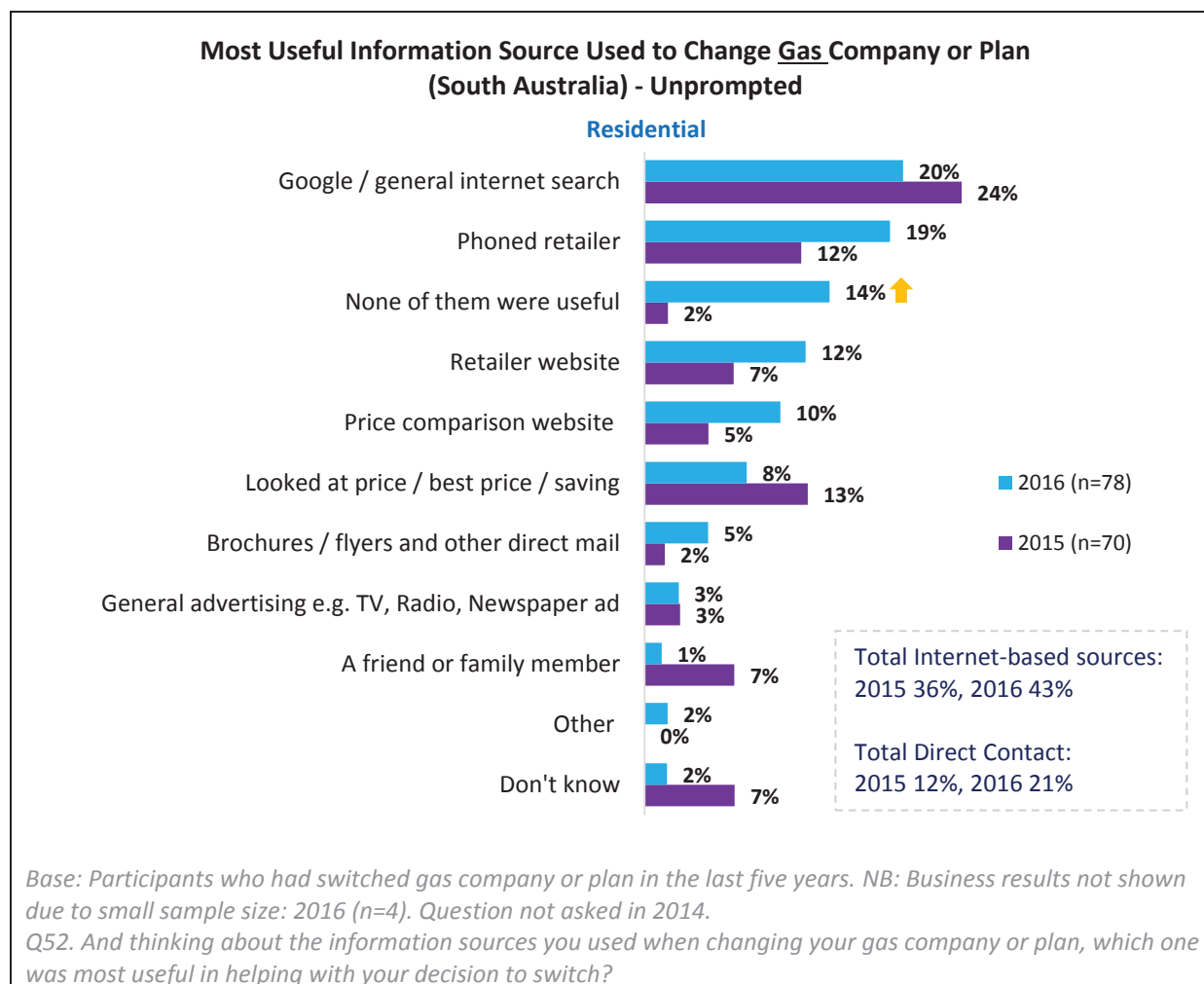


Base: Participants who had switched electricity company or plan in the last five years. NB: Question not asked in 2014.

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?

The *most useful* information source among residential consumers for switching their gas company or plan was again a Google or internet-based search (20%). Although not statistically significant, a phone call to a retailer was notably more useful this year, at 19%, up from 12% in 2015.

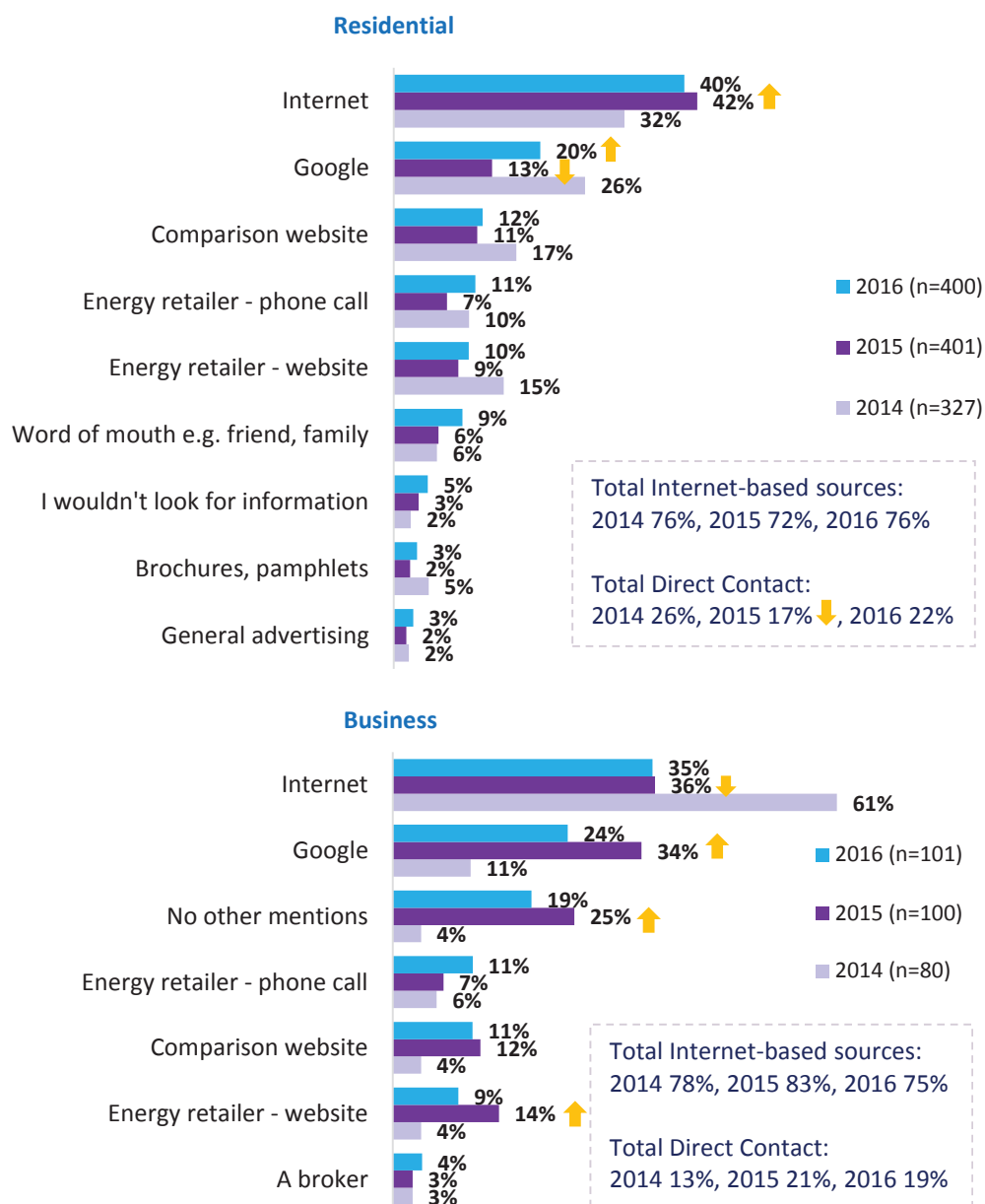
As with electricity, in 2016 a significantly higher proportion of residents found *none* of the information sources useful in helping with their decision to switch gas company or plan (14% up from 2% in 2015).



If they were to look for information about energy offers in future, internet sources remained the standout most preferred sources for the large majority of all South Australian consumers surveyed

All survey participants were asked what information source they would *most prefer to use in the future if they were to investigate their energy options*. The chart below shows that year-on-year the most preferred information source remains generically ‘the internet’ (residential: 40%, business: 35%), followed by Google (20%, 24%). In total, around three quarters of consumers cited some form of internet-based sources (residential: nett 76%, business: 75%).

Preferred Information Source for Information about Different Retailers or Plans (South Australia) - Unprompted, Top Mentions 3%+

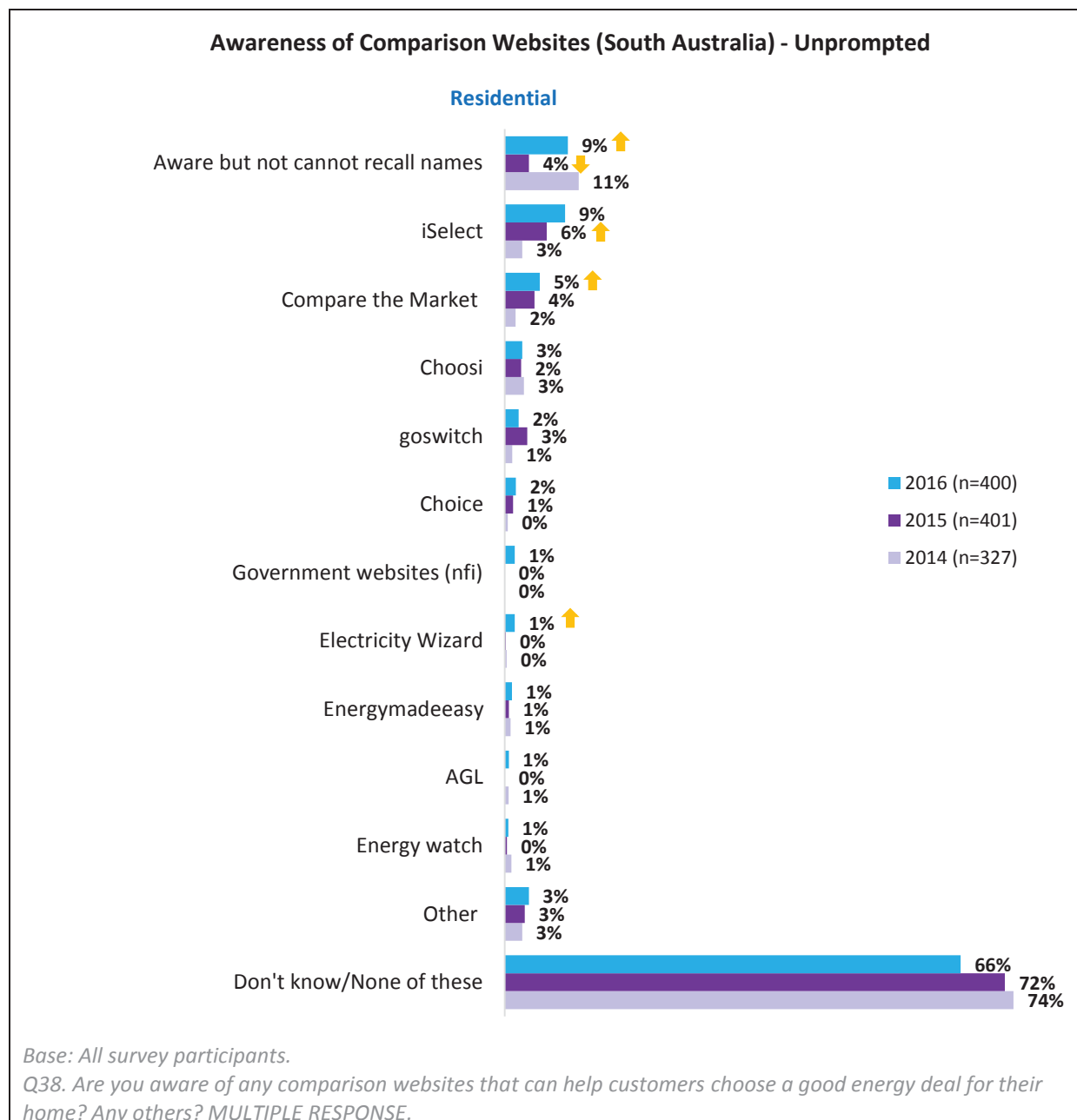


Base: All survey participants.

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?

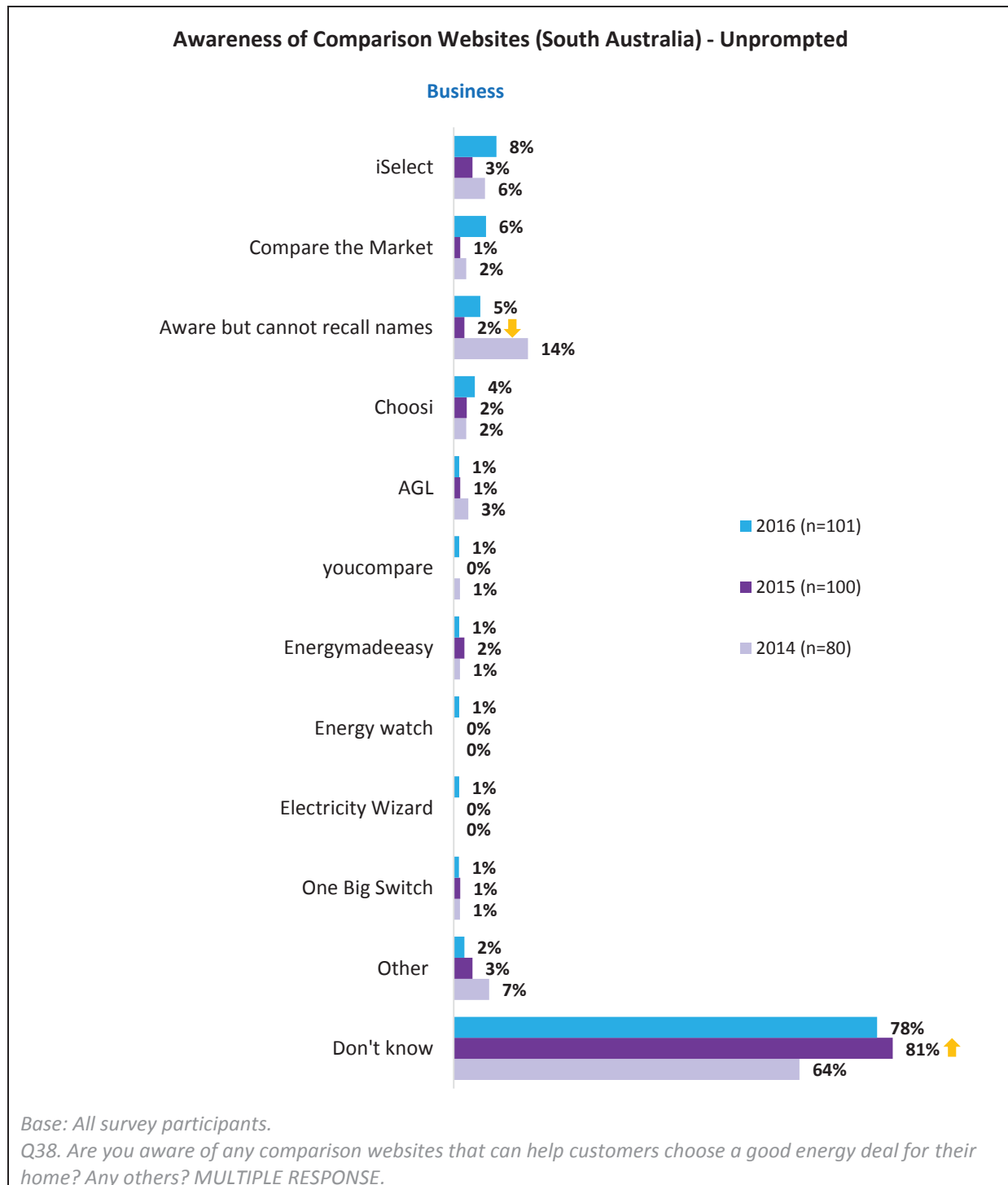
While the majority of consumers could not name a comparison site, there has been some slight growth in awareness of such sites over time

Two thirds of residential consumers (66%) were not aware of any comparison websites that could help them choose a good energy deal. This was slightly lower than the 72% in 2015 and 74% in 2014. Awareness of commercial sites such as iSelect (9% up from 3% in 2014) and Compare the Market (5% up from 2% in 2014) has increased significantly since the benchmark year.



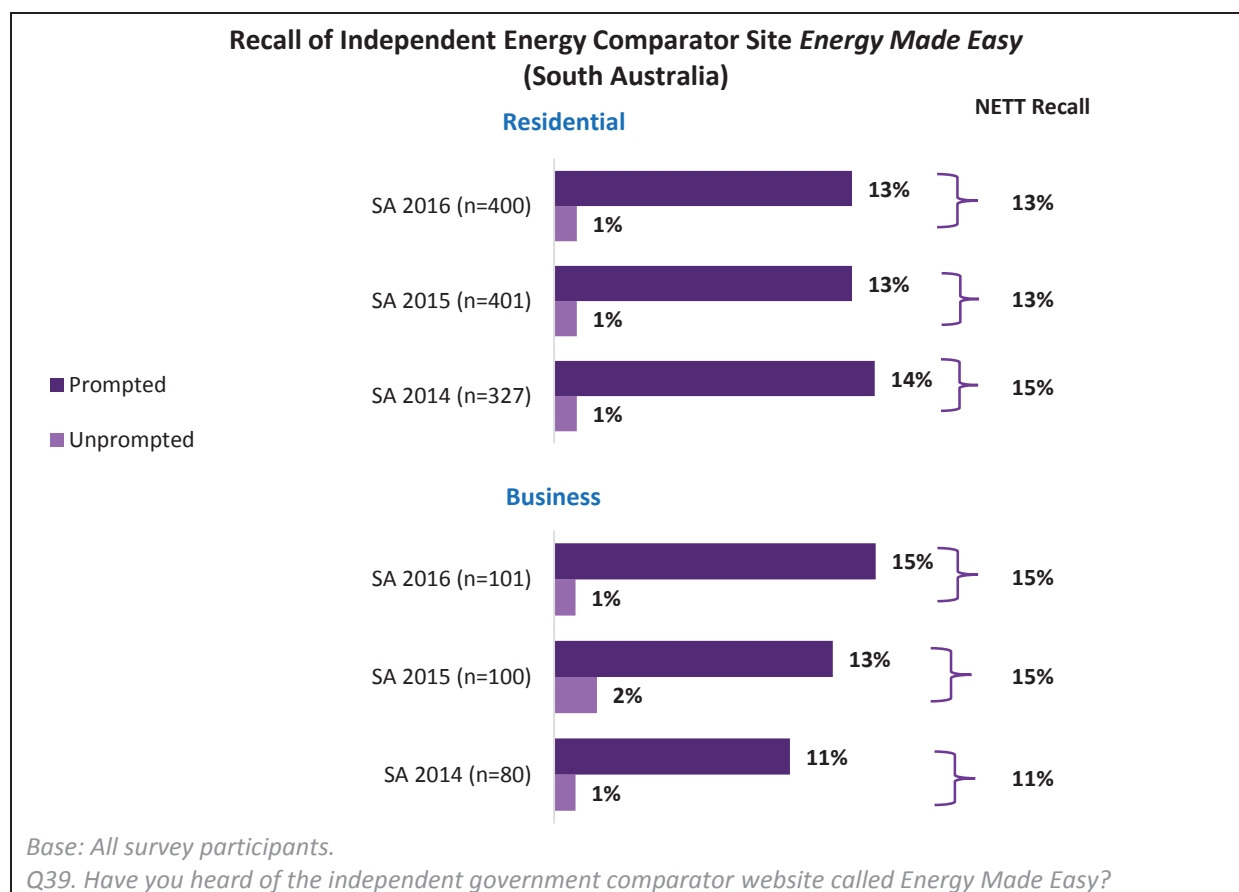
Unprompted awareness of comparison websites among *business consumers* has remained very low in South Australia, with eight in ten unable to name a comparison site (78% vs. 81% in 2015). A further 5% were aware there were such sites but could not recall any specific names.

Among those who were aware of any comparison sites, the most commonly mentioned were iSelect (8%), Compare the Market (6%) and Choosi (4%), albeit at quite low proportions.



Whilst unprompted recall was low, when prompted, just over one in ten consumers had heard of the Energy Made Easy website

When prompted, around one in eight residents (13%) and one in seven small business consumers (15%) recalled the independent government comparator website, *Energy Made Easy* – these levels have remained very consistent over time. For small business consumers there has been a very slight increase over time, from 11% in 2014 to 15% in the latest survey.



Switching rates in South Australia have remained fairly steady over time, with half of residential consumers having switched their energy company or plan in the past five years

The total incidence of *residential consumers* switching energy company and/or plan in the *last five years* among South Australian residents in 2016 remained consistent with 2015 rates (nett 50% vs. 49% respectively) and slightly lower than the 2014 benchmark of 56%. In the most recent survey, around half had switched their *electricity* company or plan (49%, compared with 48% in 2015 and 56% in 2014) and four in ten had switched their *gas* company or plan (38%, compared with 35% in 2015 and 39% in 2014).

Consumers in South Australia remained far more likely to have switched their energy company or plan in the last five years than other services such as their car insurance (30% in 2016), home insurance (25%), internet (23%), mobile phone (22%), bank (17%), home phone (15%) or health insurance (12%).

Among *business consumers*, around six in ten (57%) *had changed their electricity company or plan in the past five years*, which is a slight increase from 2015 (49%) and 2014 (47%).

Switching rates *in the past 12 months* were similarly very consistent among residential consumers, with just under one quarter (23%) reporting having switched electricity or gas company or plan in the last 12

months, compared with 19% in 2015. Among *business* consumers, *switching rates for electricity company or plan* more than doubled this year (from 13% in 2015 to 31% this year).

Residential consumers were significantly more likely to have switched energy provider or plan in the past five years if they had actively investigated options (73% vs. 42%), had been directly approached by retailers (58% vs. 45%), or owned their home (55% vs. 41%).

Gas results among business consumers are not shown due to small sample sizes.

Switching Rates for Various Service Providers - *Last Five Years*

Incidence of Switching (% switched at least once in <i>last five years</i>)	SOUTH AUSTRALIA Residential			SOUTH AUSTRALIA Business		
	2014 (n=327)	2015 (n=401)	2016 (n=400)	2014 (n=80)	2015 (n=100)	2016 (n=101)
Electricity Company	35%	36%	35%	33%	33%	41%
Electricity Plan	39%	31% ↓	28%	33%	25%	35%
TOTAL Electricity	56%	48%	49%	47%	49%	57%
Gas Company	26%	29%	26%	Not shown due to small sample size		
Gas Plan	28%	24%	22%			
TOTAL Gas	39%	35%	38%			
TOTAL Electricity or Gas	56%	49%	50%	Business consumers not asked these questions		
Car Insurance	37%	33%	30%			
Home Insurance	22%	25%	25%			
Internet	32%	27%	23% ↓			
Mobile	32%	27%	22% ↓			
Banking	15%	17%	17%			
Home Phone	20%	20%	15%			
Health Insurance	11%	12%	12%			

Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample sizes: 2016 (n=23), 2015 (n=28).

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?

Switching Rates for Electricity and Gas Companies and Plans - *Last 12 Months*

Incidence of Switching (% switched at least once in <i>last 12 months</i>)	SOUTH AUSTRALIA Residential		SOUTH AUSTRALIA Business	
	2015 (n=401)	2016 (n=400)	2015 (n=100)	2016 (n=101)
Electricity Company	9%	11%	8%	17%
Electricity Plan	13%	13%	5%	19% ↑
TOTAL Electricity	18%	20%	13%	31% ↑
Gas Company	11%	13%	Not shown due to small sample size	
Gas Plan	12%	15%		
TOTAL Gas	17%	23%		
TOTAL Electricity or Gas	19%	23%		

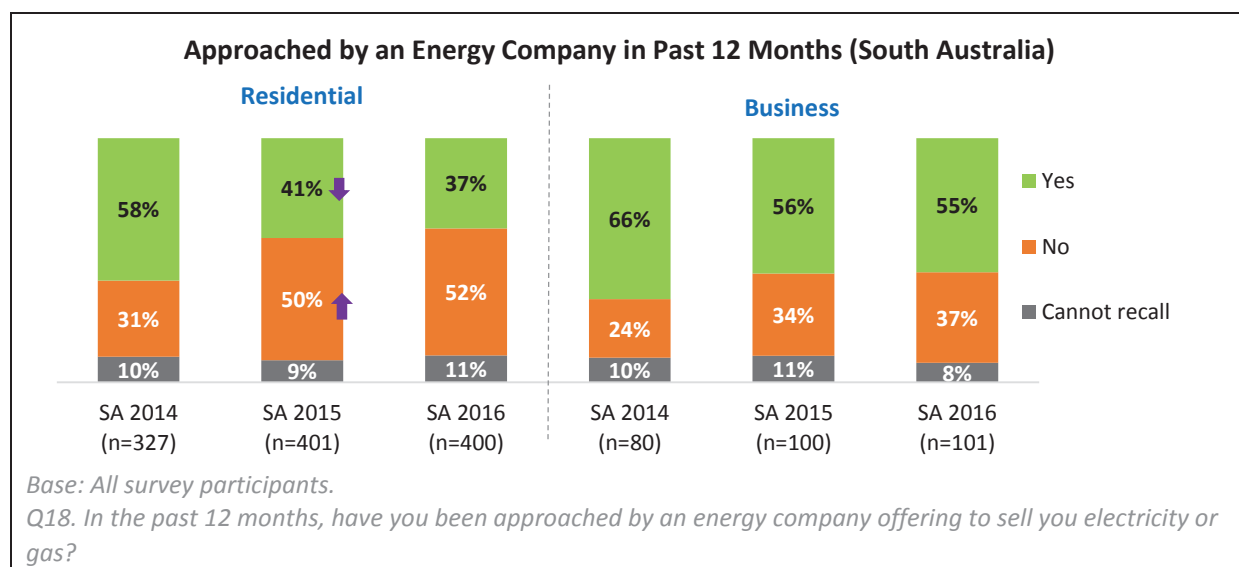
Base: All survey participants. NB: Small business consumer results for gas not shown due to small sample sizes: 2016 (n=23), 2015 (n=28).

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?

Following a substantial drop in 2015, the incidence of direct approaches from energy companies in South Australia remained fairly steady this year

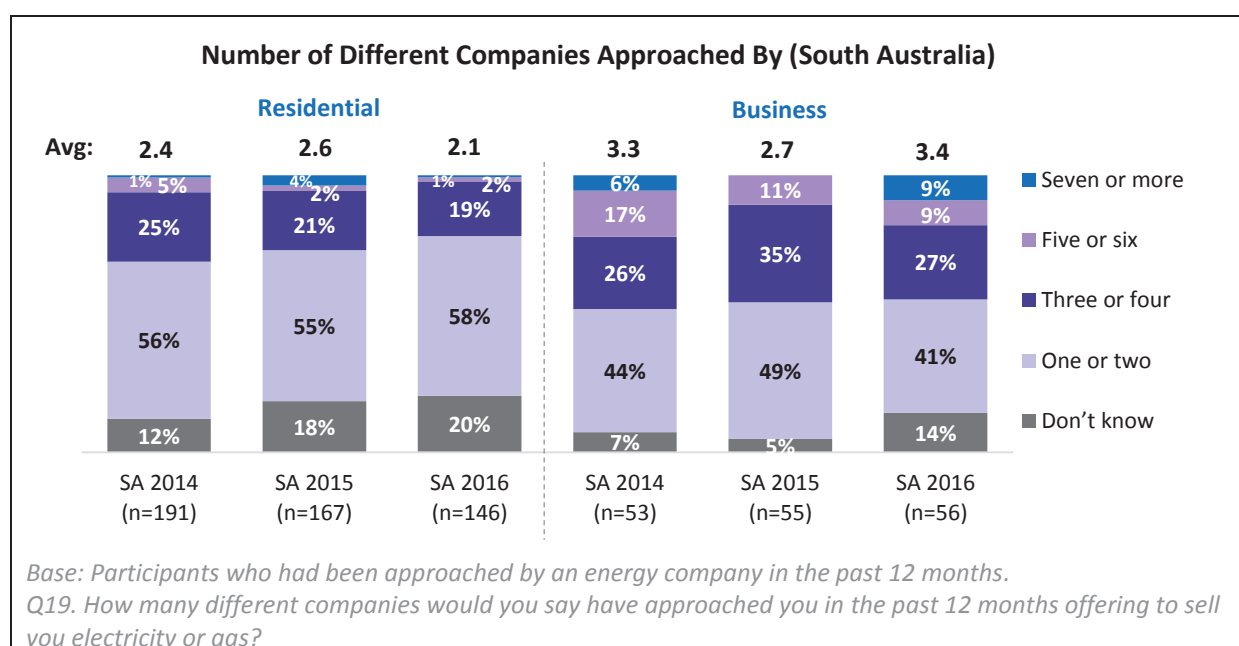
Just under four in ten *residential* consumers (37%) had been approached by energy companies offering to sell them electricity or gas in the past 12 months. This was fairly consistent with the previous year (41%) and remained significantly lower than in 2014 (58%).

The proportion of *small business consumers* who reported being approached by an energy company in 2016 (55%) was very consistent with the previous year (56%).



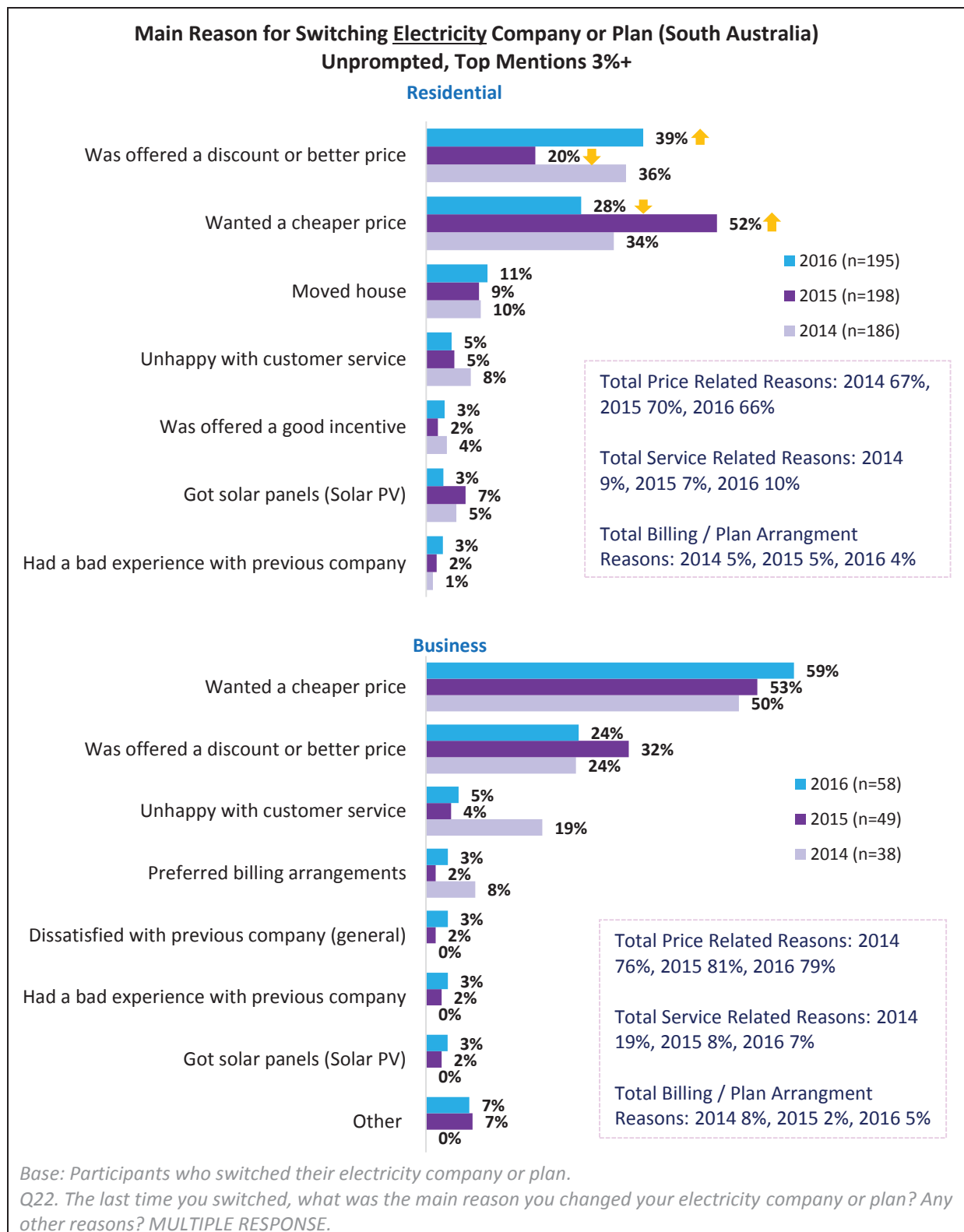
The majority of residential consumers who were approached recalled that these were from just one or two companies (58%), with the average decreasing slightly this year (2.1 down from 2.6 in 2015).

Among *business* consumers who were approached, two in five reported having been approached by just one or two companies (41%), while one in ten of these respondents (9%) were approached by seven or more. On average, small business consumers were approached by 3.4 companies. This was slightly higher than in 2015 (2.7) and consistent with 2014 (3.3).

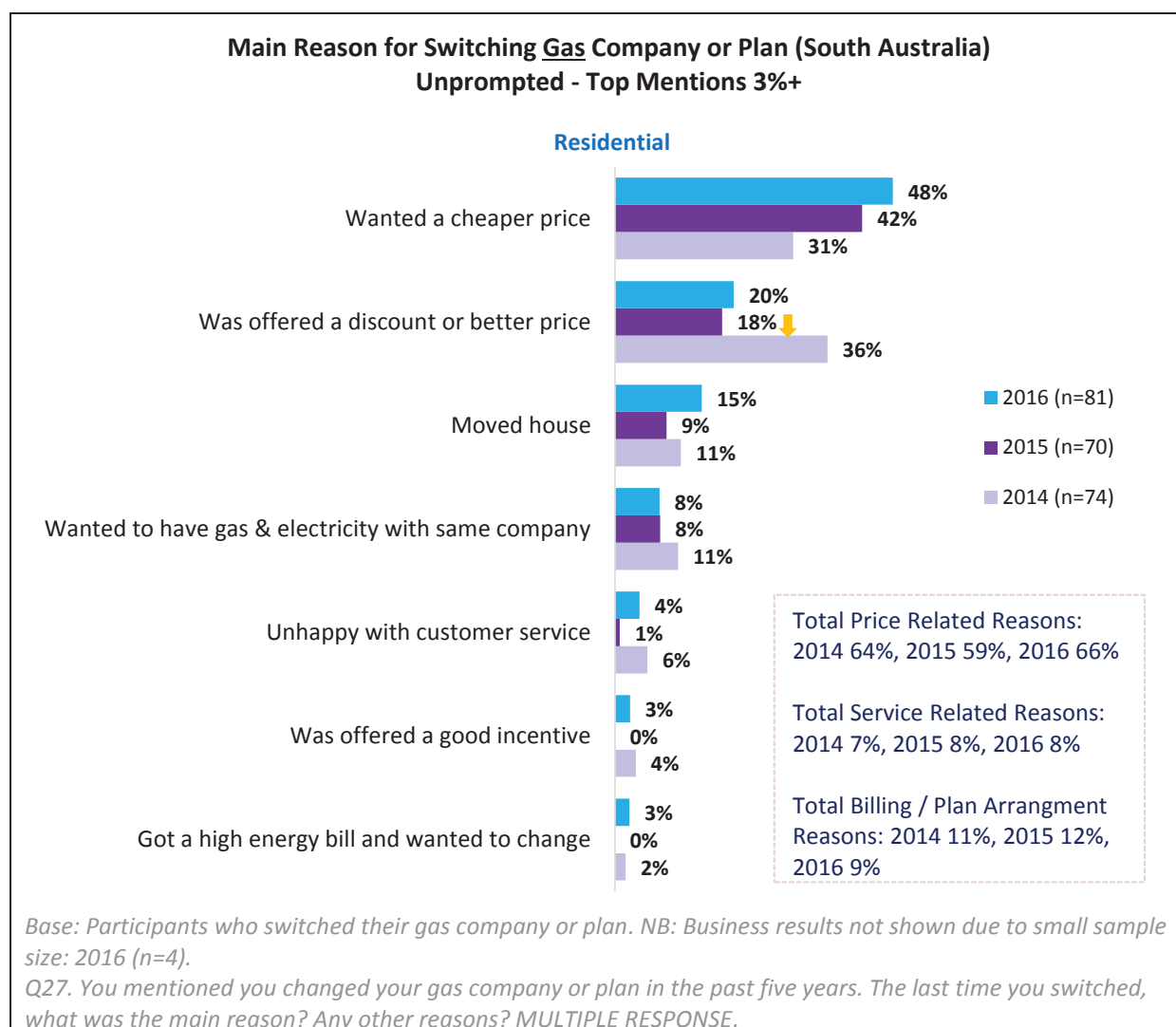


Price related factors remained the main unprompted reason for switching

Price related factors (being offered a discount, rebate or price incentive, or wanting a cheaper price) remained the main unprompted and subsequently manually coded reason for switching *electricity* company or plan in 2016. In total, two-thirds (66%) of residential consumers and 79% of business consumers mentioned these reasons unprompted. At lower levels, consistent with previous years' results one in ten (11%) residential consumers switched because they had moved house and 5% switched because they were unhappy with the customer service at their previous company.



Similar to reasons for switching electricity company and in line with 2015 results, the main drivers for residential consumers to switch gas company or plan were price related (in total 66% mentioned these). Secondary reasons included moving house (15%) and having electricity and gas with the same company (8%).

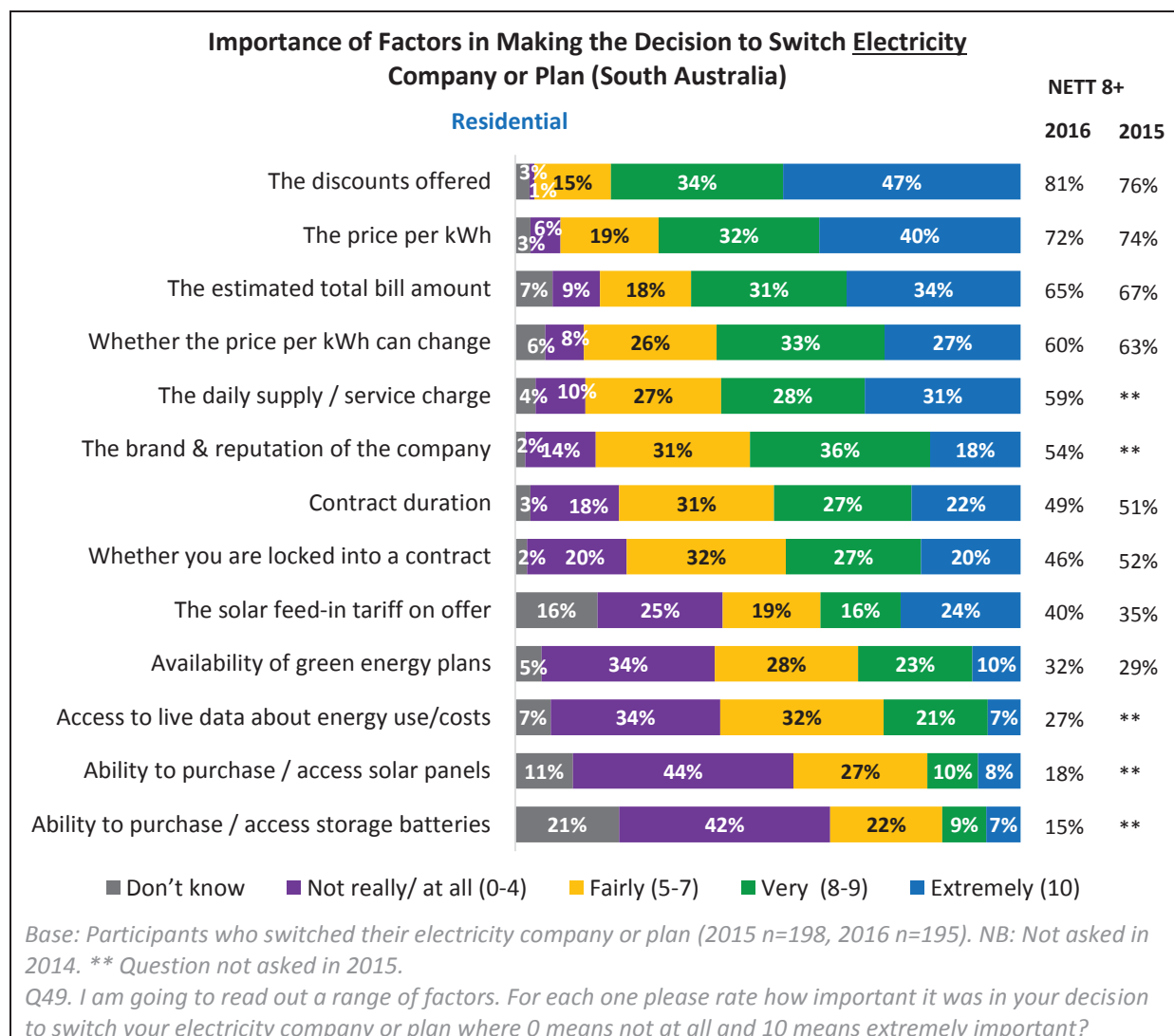


When prompted with a range of considerations when switching electricity company or plan, the discounts offered and the price per kWh were again considered the most important factors

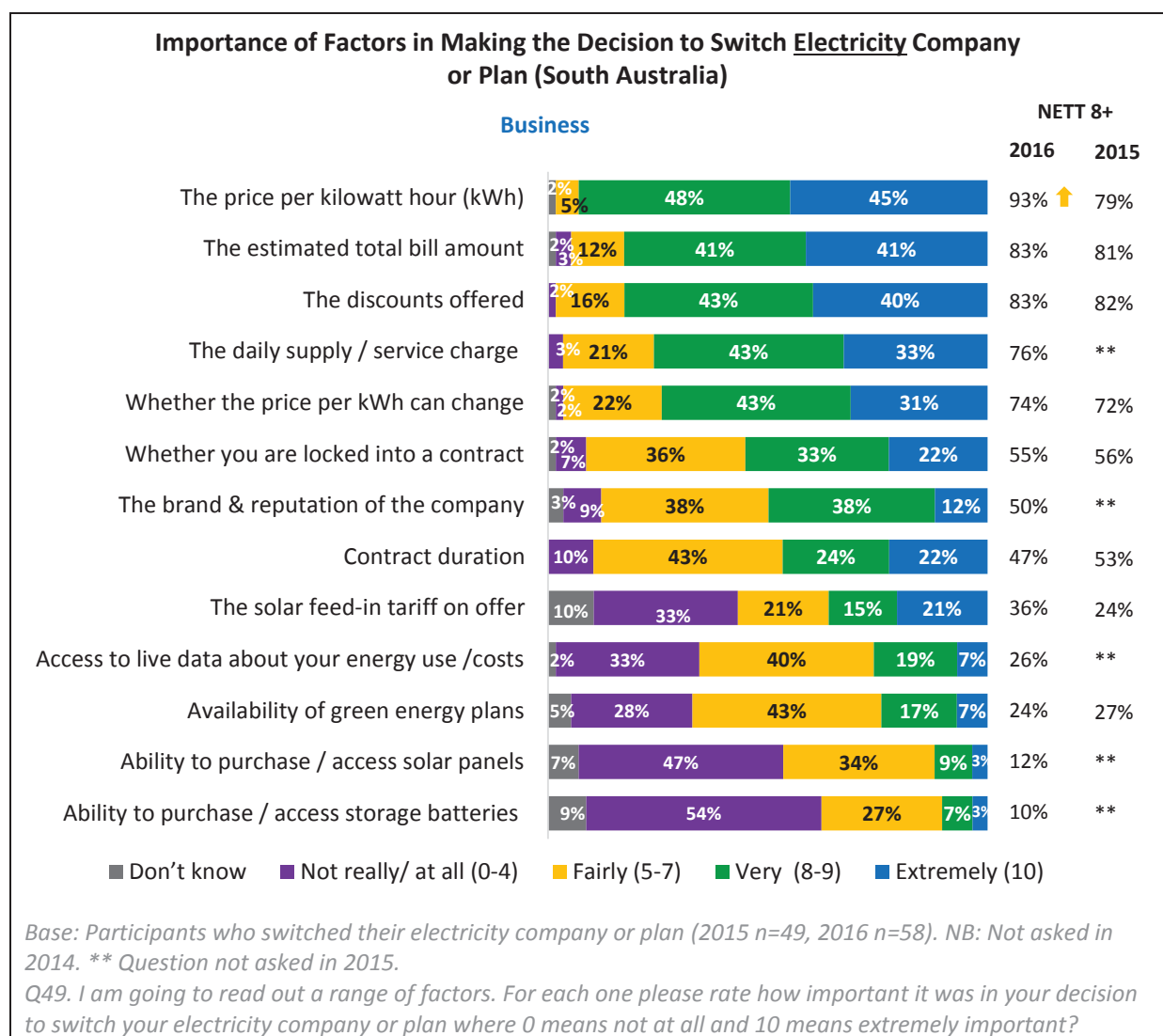
As was the case in 2015, when those who had switched company or plan in the last five years were prompted with a range of factors that could be considered when deciding whether or not to switch, the most important ones were the discounts offered: 81% of residents and 83% of business consumers rated the importance of this as 8 or more out of 10; the price per kWh (72% of residents and 93% of businesses – the latter up significantly from 79% in 2015); and the estimated total bill amount (65%, 83%).

Of least importance to consumers who had switched were new items in 2016: i.e. the ability to access storage batteries (15% of residential consumers and 10% of small businesses rated this as 8 or more); the ability to access solar panels (18%, 12%); and the ability to access live data about energy use/costs (27%, 26%).

Among residential consumers with solar panels, the solar feed-in tariff was the third highest priority (with 79% rating this 8 or more) after the price per kWh and the discounts offered (both at 82%).



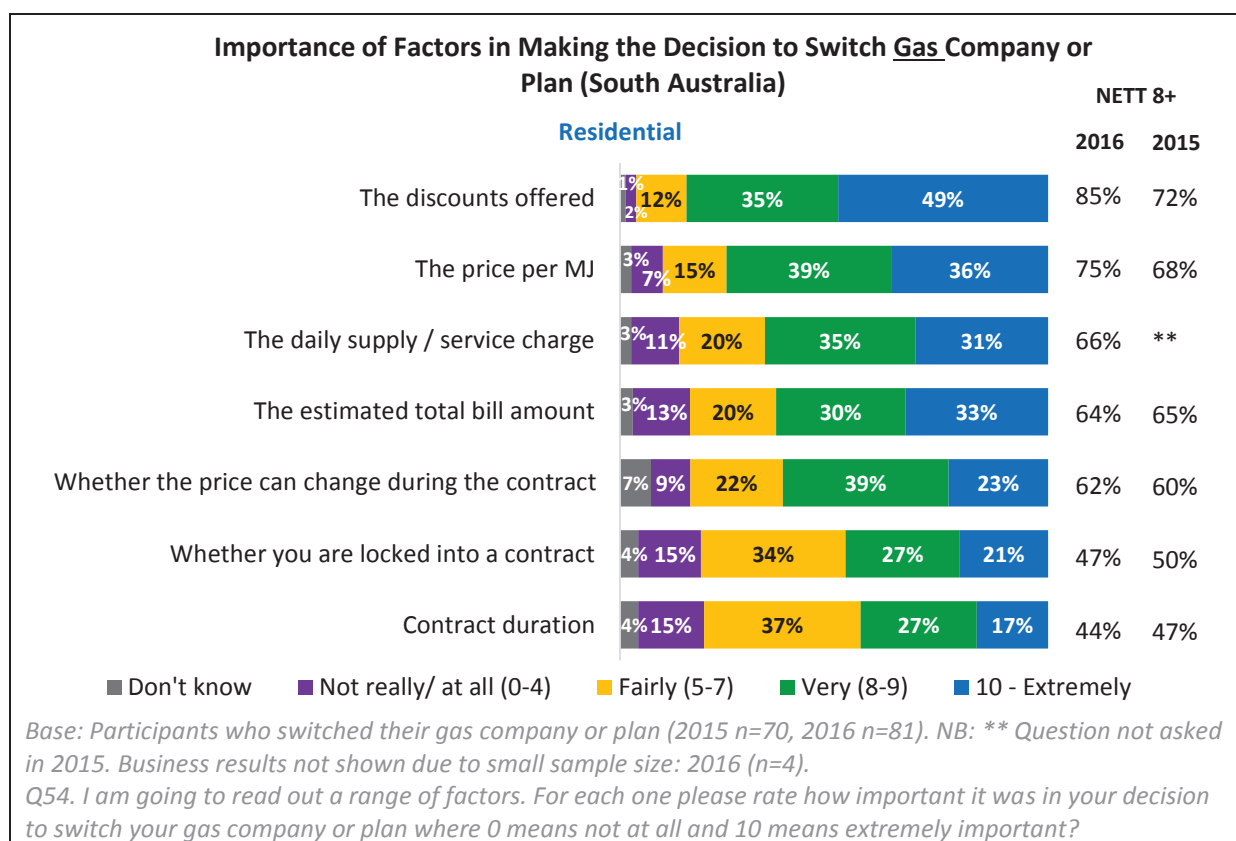
The importance ratings for business consumers surveyed are charted over the page.



As shown on the chart over the page, the importance of factors for residents in making the decision to switch gas company were fairly similar to priorities for consideration when switching electricity company.

The most important factors were the discounts offered, with 85% giving an importance rating of 8 or more out of 10, and the price per megajoule (75%).

Results for business gas consumers are not illustrated due to small sample sizes of less than n=30.



Consumers with higher energy bills wanted to see a larger saving before considering switching

In order to seriously consider switching their company or plan, on average residents indicated that they would need to save \$238 per year on their electricity bill and \$186 on their gas bill. This was broadly consistent with the previous year.

By comparison and reflecting their higher average energy bills, small business consumers felt they would need to save about \$608 on their electricity bill in order to consider switching, which is lower than in 2015 (\$868) but not significantly so.

As was the case in 2015, the higher the energy bill was, the higher the saving needed to be in order to seriously consider switching. Although not statistically significant, there was a decline in the savings small businesses with *high* quarterly electricity bills of \$1000+ wanted to see, from an average of \$1,525 in 2015, to \$1,032, suggesting an increased price sensitivity among these customers. Meanwhile, those businesses with relatively *small* bills of less than \$500 a quarter felt they would need to see a somewhat larger saving than last year (from \$210 to \$374 per year).

Amount Needed to Save Annually on <u>Electricity</u> Bill to Seriously Consider Changing (Average by Bill Size)	SOUTH AUSTRALIA Residential		SOUTH AUSTRALIA Business	
	2015 (n=360)	2016 (n=376)	2015 (n=96)	2016 (n=97)
Total	\$214	\$238	\$868	\$608
Last Quarterly Electricity Bill: Low	\$185	\$183	\$210	\$374
Last Quarterly Electricity Bill: Medium	\$236	\$266	\$380	\$316
Last Quarterly Electricity Bill: High	\$261	\$280	\$1,525	\$1,032

Base: All survey participants. NB: Question not asked in 2014.

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? Residential: "Low" is <\$300, "Medium" is \$300 to <\$500, "High" is \$500 and above. Business: "Low" is <\$500, "Medium" is \$500 to <\$1,000, "High" is \$1,000 and above.

Amount Needed to Save Annually on <u>Gas</u> Bill to Seriously Consider Changing (Average by Bill Size)	SOUTH AUSTRALIA Residential	
	2015 (n=194)	2016 (n=207)
Total	\$169	\$186
Last Quarterly Gas Bill: Low	\$162	\$137
Last Quarterly Gas Bill: Medium	\$179	\$190
Last Quarterly Gas Bill: High	\$170	\$237

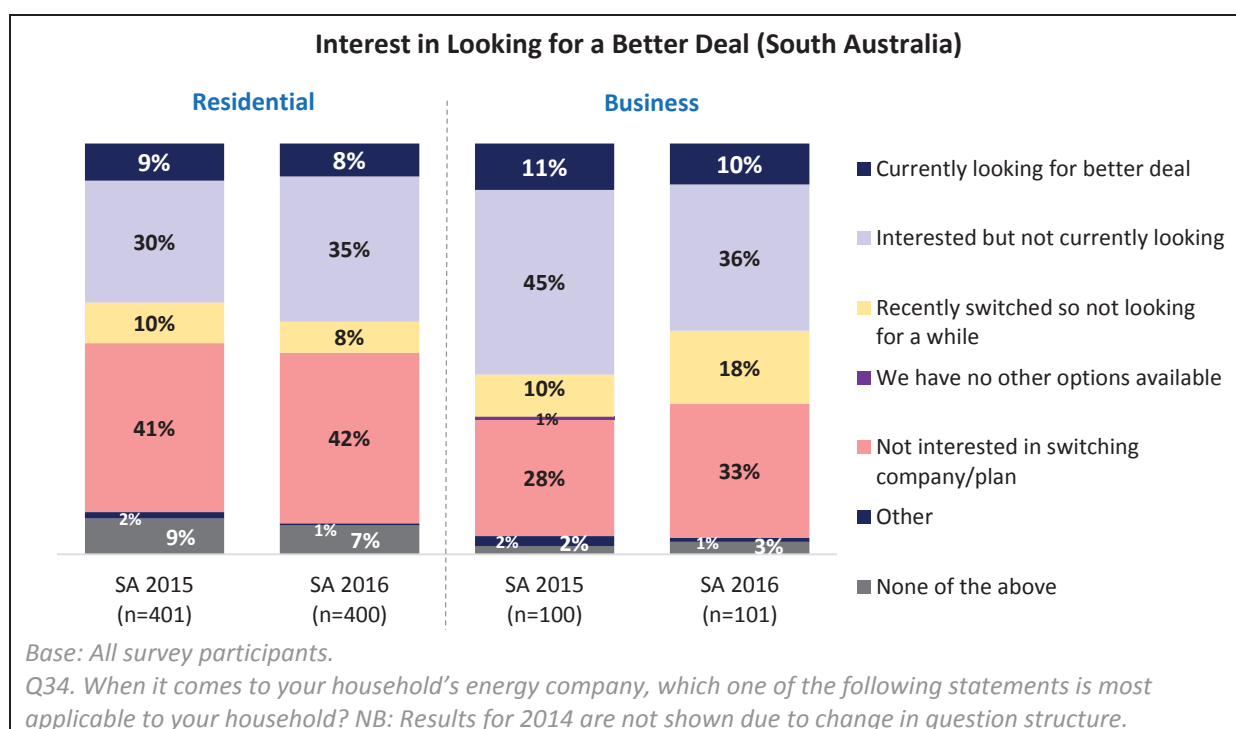
Base: Participants with mains connected gas. NB: Business results not shown due to small sample size: 2016 (n=22). Question not asked in 2014.

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? Residential: "Low" is <\$200, "Medium" is \$200 to <\$299, "High" is \$300 and above. Business: "Low" is <\$150, "Medium" is \$151 to <\$349, "High" is \$350 and above.

Around four in ten consumers were either seeking or interested in seeking a better deal

Consistent with the previous year, around four in ten residential consumers were *currently looking or interested in looking for a better deal* (nett 43% vs. 39% in 2015). Slightly more business consumers were *currently looking or interested in looking for a better deal* (46%) – while this was lower than the previous year (56%) it was not a statistically significant drop.

Around four in ten residential consumers (42%) and a third of business consumers (33%) were not currently interested in switching, which was fairly consistent with 2015 (41% and 28% respectively).



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:

- Younger (57% of those aged 18-34 vs. 39% of those aged 35 and older);
- University-educated (53% vs. 39% other);
- In paid employment (49% vs. 38% of others);

- Had actively investigated options in the past 12 months (61% vs. 37% who hadn't);
- Probably or definitely intend to install solar panels in the next two years (59% vs. 37% probably or definitely won't); and
- Already have storage batteries or probably or definitely will have in the next two years (52% vs. 37% probably or definitely won't).

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

- Be older (46% of those aged 35 and above vs. 25% of those aged 18-34);
- Live in a household without children (46% vs. 32% with children);
- Have completed only primary or secondary schooling (51% vs. 34% with tertiary qualifications); and/or
- Be unemployed, retired or in unpaid domestic work (47% vs. 36% employed).

7.2.2 Consumer Outcomes

Introduction

This section of the report details the findings on South Australian consumers’:

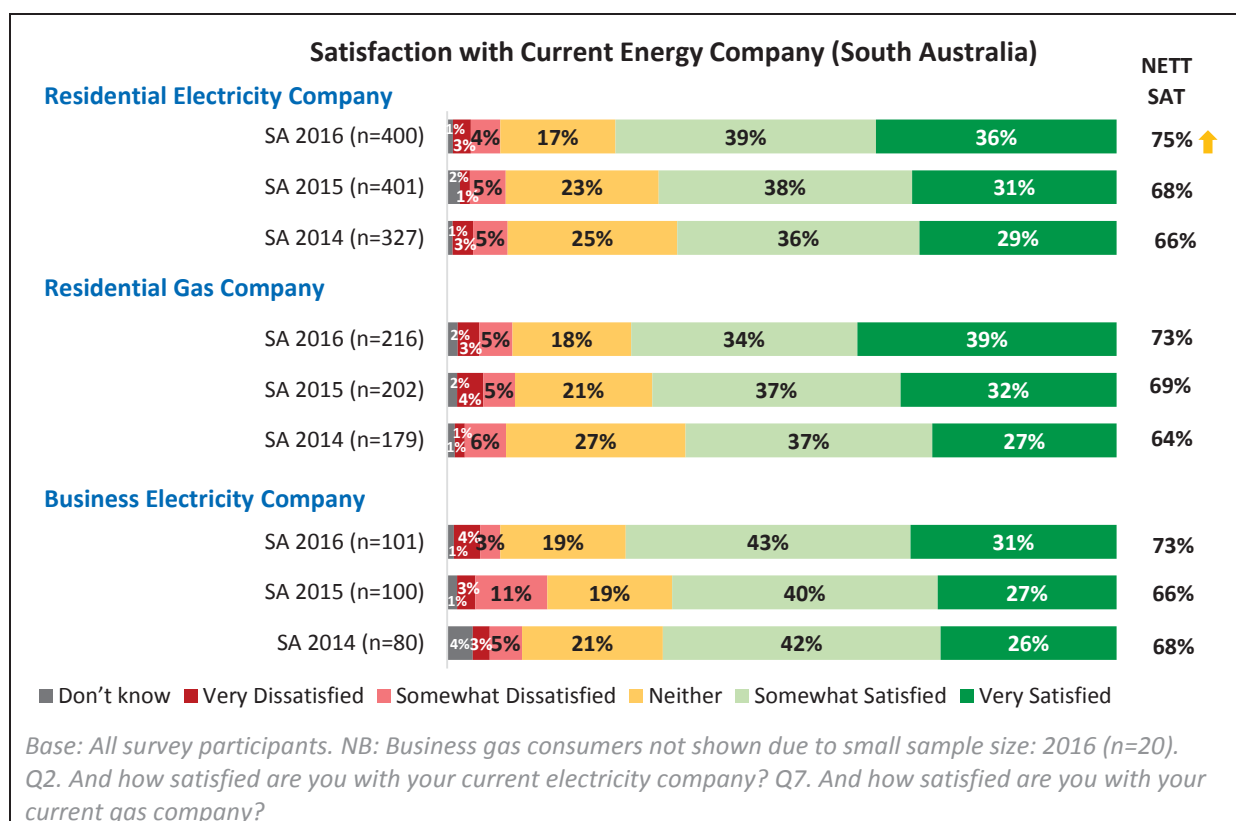
- Perceptions of energy retailers including overall satisfaction, service and value for money;
- Satisfaction with the level of choice in the market;
- Satisfaction with the switching process among those who had done so;
- Consumer confidence that they can find the right information and make the right choice in the market; and
- Attitudes to switching.

The Results

Satisfaction levels with energy companies in South Australia increased this year

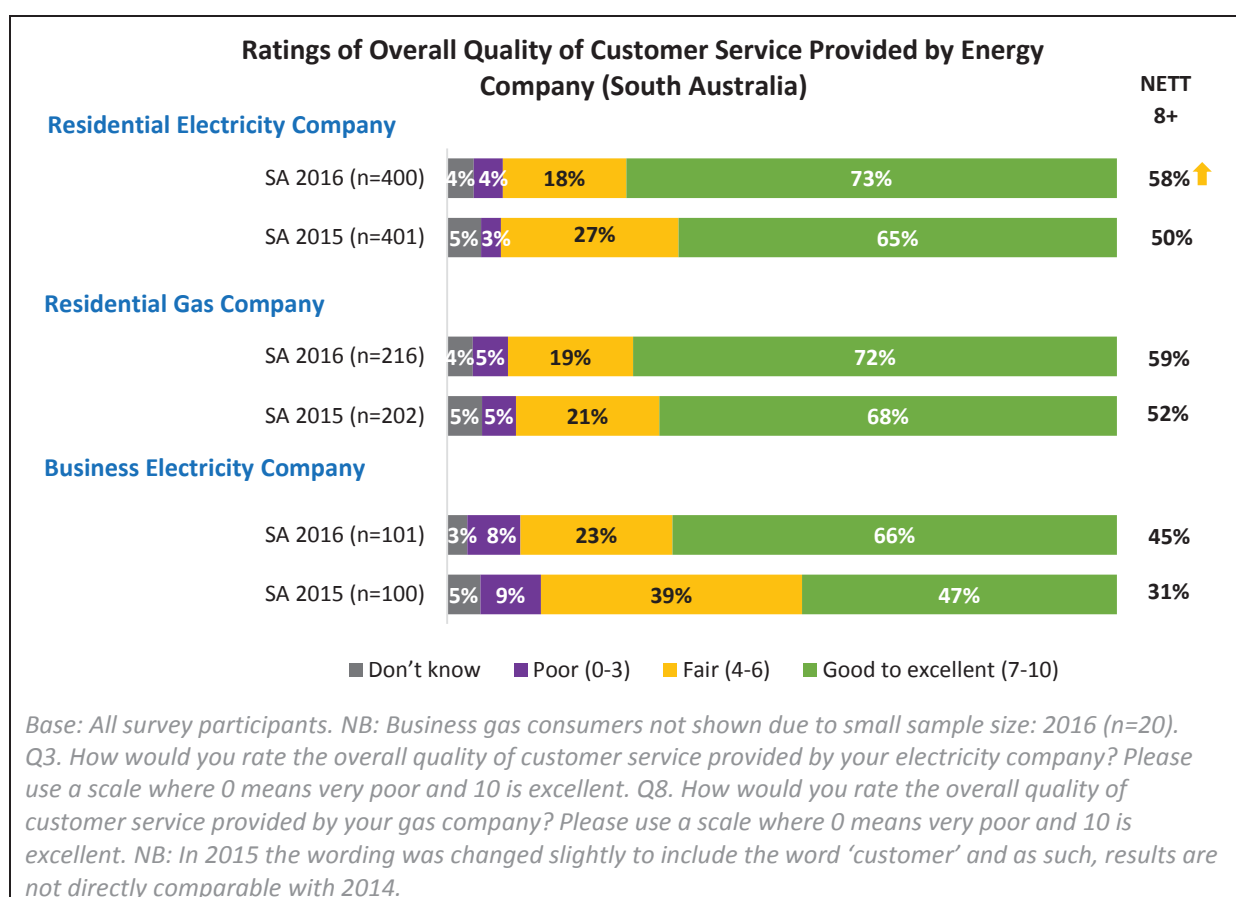
To provide context to the consumer activity results, all survey participants were asked whether they were satisfied with their current energy companies. Three quarters of residential consumers were somewhat or very satisfied with their electricity company (75% - significantly more than in 2015: 68%). A similar proportion were satisfied with their gas company (73%) and although not statistically significant, this is a notable increase since the benchmark survey (64% in 2014).

Satisfaction levels were similar among small business consumers, with 73% being somewhat or quite satisfied with their electricity company. This was notably more than the previous wave (66% in 2015), although the increase was not statistically significant.



When it came to the overall quality of customer service provided by their electricity company, there were also increases in ratings. The proportion of residential consumers who gave a rating of 8 or more out of 10 increased significantly from 50% in 2015 to 58% in 2016. Among small business consumers ratings also improved from 31% to 45%.

The overall quality of service provided by gas companies remained fairly consistent this year, with 72% of *residential* consumers rating this an 8 or more out of 10 (compared to 68% in 2015). Business results for gas companies are not shown due to small sample sizes.

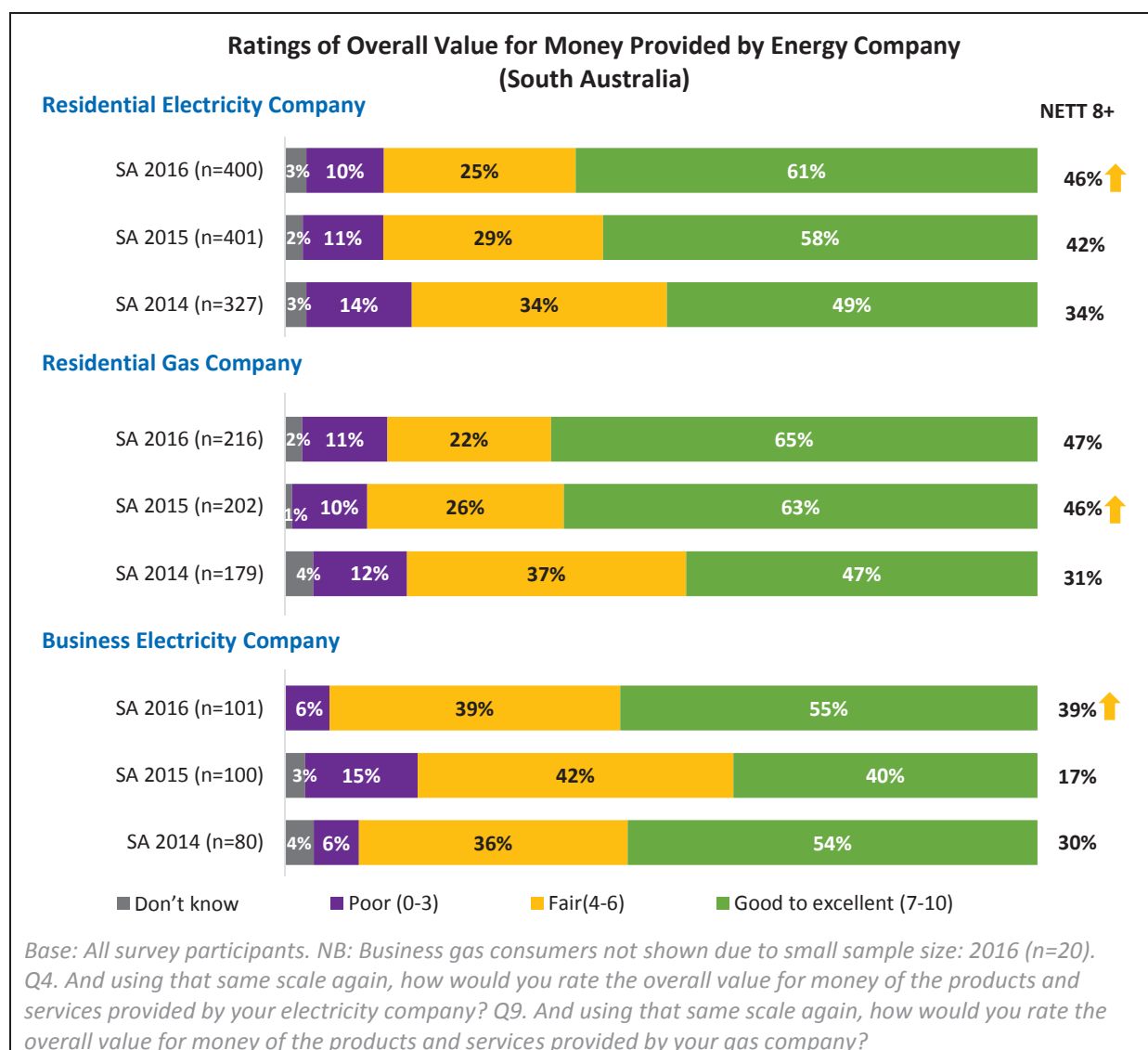


Overall value for money ratings were at their highest this review

There was also some improvement in the *overall value for money* provided by energy companies. Almost half (46%) of residential consumers gave their electricity company a rating of an 8 or more out of 10, which is a significant increase from the benchmark wave (34%).

For small business consumers, the proportion who gave their electricity company a rating of 8 or more increased significantly this year (39% up from 17% in 2015) and returned to a similar level as in 2014 (30%).

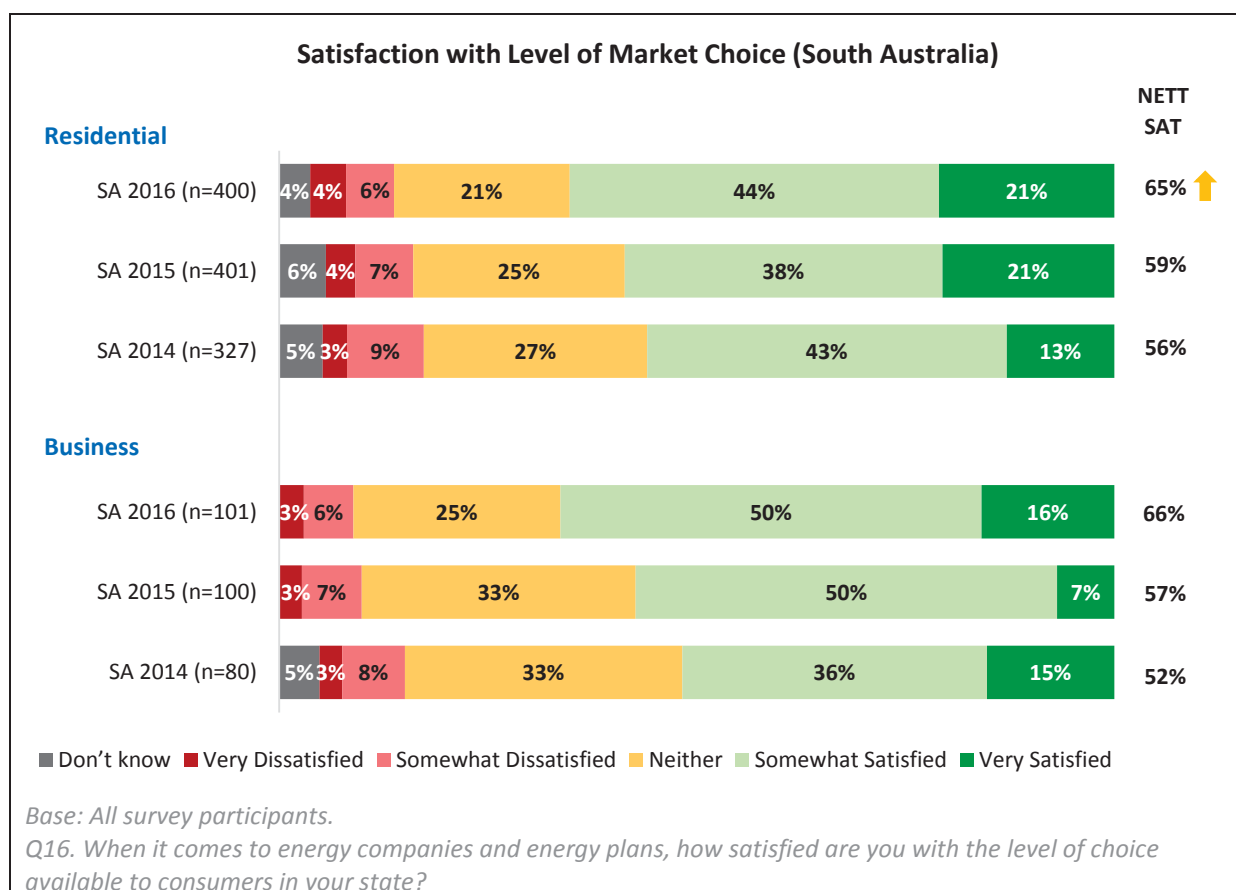
Nearly two thirds of residential gas consumers rated the value for money from their gas companies as 7 or higher (65% vs. 63% in 2015 and 47% in 2014).



Satisfaction with the level of choice in the South Australian energy market increased

Participants were asked to indicate their satisfaction with the level of market choice in their state. Among residential consumers there was a significant improvement this year, with 65% somewhat or very satisfied, compared with 59% in 2015 and just 56% in 2014.

Among small businesses there was a similar upward trend in satisfaction levels, with the proportion of somewhat or very satisfied consumers increasing slightly from 52% in 2014 to 66% in 2016, as shown over the page.



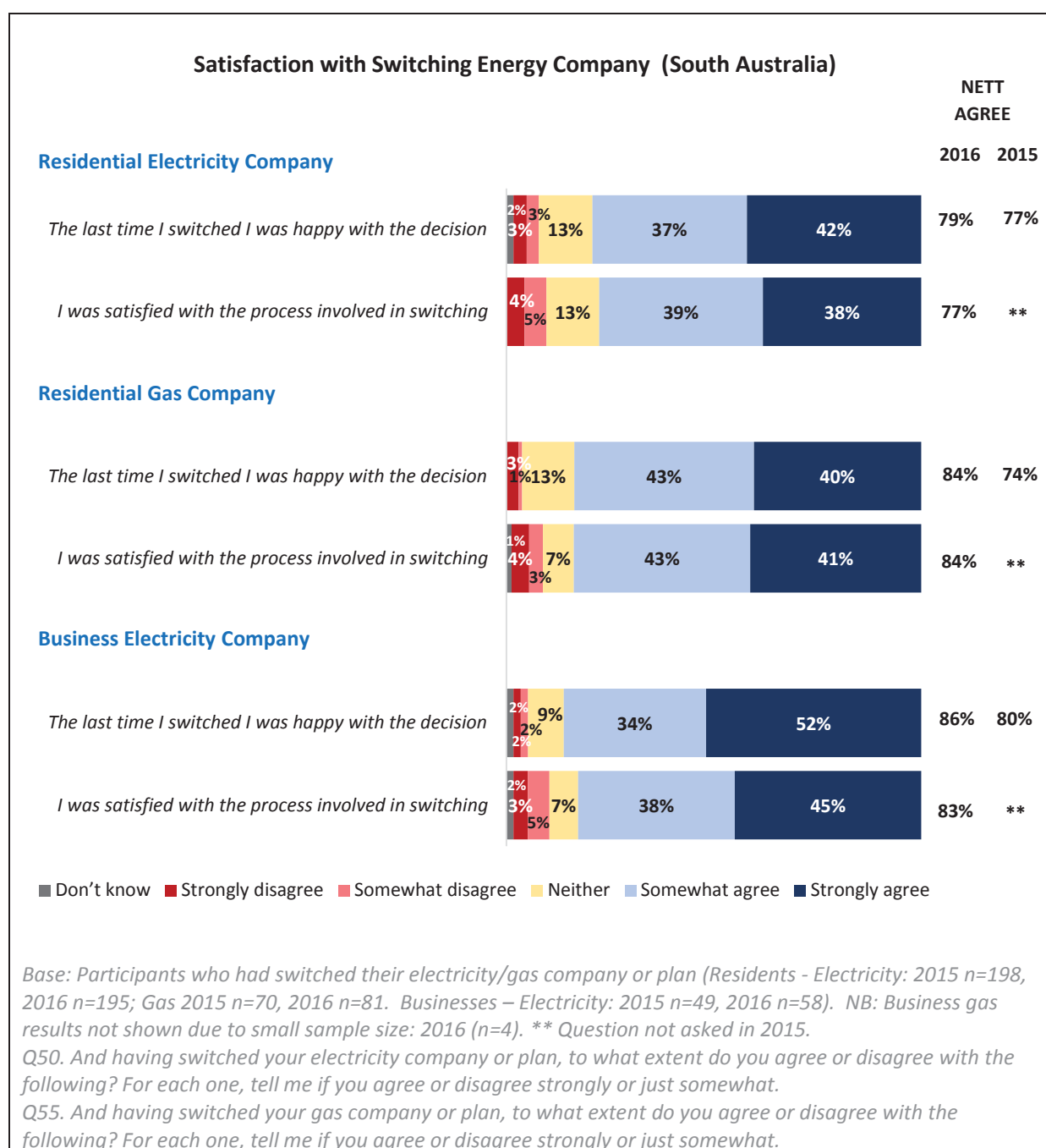
Most consumers who had switched their energy company or plan were happy with their decision and satisfied with the process involved

The attitudes of *consumers who had switched energy company or plan* were explored through measuring agreement / disagreement levels with two statements about whether they were happy with the process involved in the switch and if they were happy with their decision.

For electricity, the majority of consumers again agreed that *the last time I switched I was happy with the decision*. Among residential consumers: 79% in 2016 compared to 77% in 2015, and among business consumers: 86% vs. 80% in 2015.

Around eight in ten consumers agreed with the new statement, *I was satisfied with the process involved in switching* (77% of residents and 83% of small business consumers).

The majority of *residential consumers who had switched their gas company or plan* also agreed that *the last time I switched I was happy with the decision* (84% in 2016 up from 74% in 2015), and that *I was satisfied with the process involved in switching* (84%).



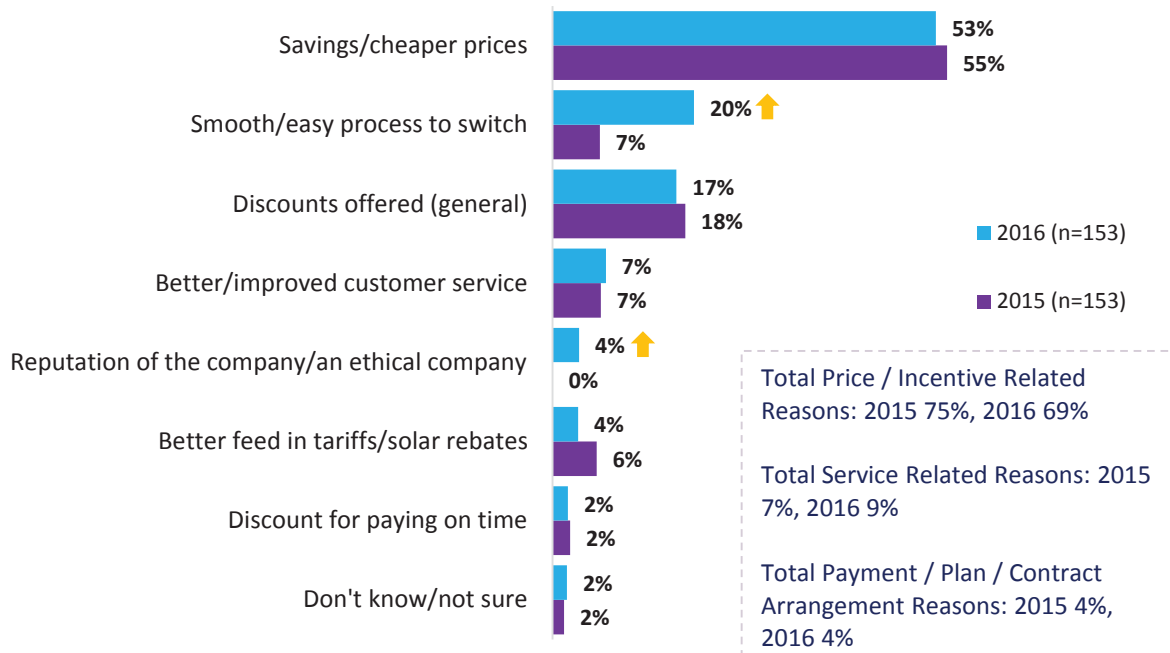
There was a significant increase in the proportion of consumers who were happy with process involved in switching because they found it easy to do

Residential consumers who were *happy with their decision to switch electricity company* were asked why they felt that way and their responses were subsequently manually coded to measure the incidence of themes. As shown on the following page and similar to results in 2015, they were most likely to feel that way as a result of the savings, cheaper prices or the discounts and incentives offered (nett 69%). A significantly higher proportion of consumers were also happy in 2016 because the process was smooth / easy (20% up from 7% in 2015).

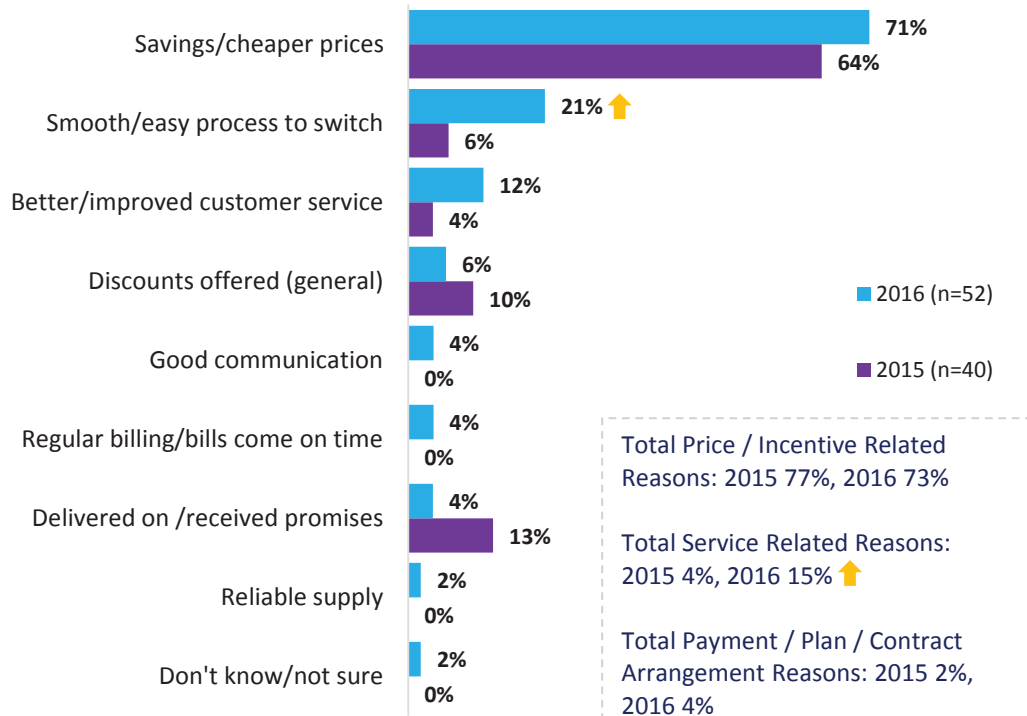
Business consumers who were *happy with their decision to switch electricity company* cited similar reasons to residential consumers. Seven in ten were happy as a result of the savings, cheaper prices or the discounts and incentives offered (nett 73%). A significantly higher proportion were also happy with the smooth and easy switching process (21% up from 6% in 2015), and there was an increase in the total proportion who were happy for q2.service related reasons (from nett 4% in 2015 to 15%).

**Reasons for Being Happy with the Decision to Switch Electricity Company or Plan
(South Australia) - Unprompted, Top Mentions 2%+**

Residential



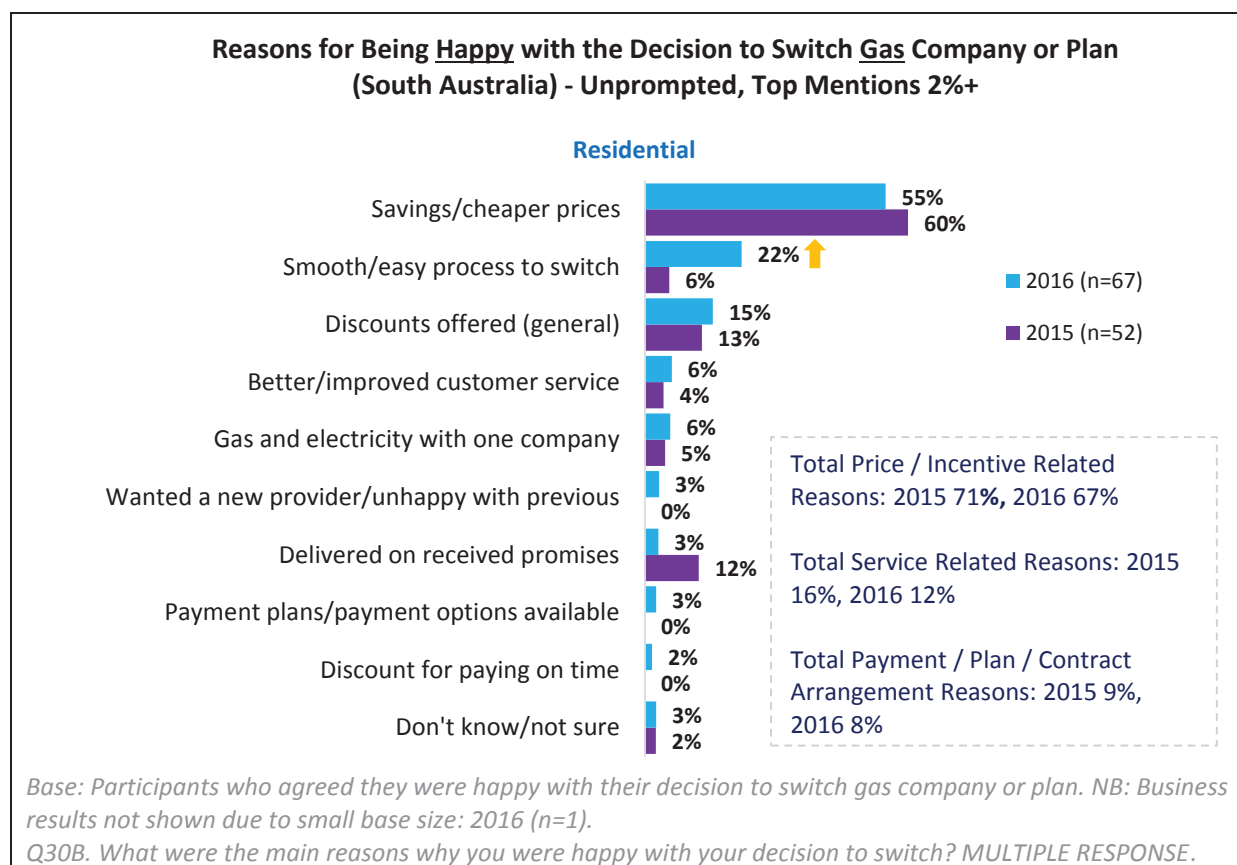
Business



Base: Participants who agreed they were happy with their decision to switch electricity company or plan. NB: Question not asked in 2014.

Q25B. What were the main reasons why you were happy with your decision to switch? MULTIPLE RESPONSE.

Residential consumers *happy with their decision to switch gas company* mentioned similar reasons as electricity companies, with nett 67% mentioning the savings, cheaper prices or the discounts and incentives offered. A significantly higher proportion in 2016 were happy because the gas switching process was smooth / easy (22% up significantly from 6% in 2015).



Importantly, only thirteen residential consumers and two small business consumers were *not* happy with their decision to switch. The reasons in 2016 were generally similar to those given in 2015; the main ones being that there were no real savings or that the savings were not as expected. A few also mentioned difficulties with the switching process. Both of the business consumers were unhappy because they felt they were forced to change their company or plan. A small selection of verbatim responses is included below to illustrate these concerns:

"I think I should've received a better discount." Residential Consumer

"I paid \$10k for my solar panels by the same company I receive power from. They continually reduce my solar rebates, increase power costs and continue to say I cannot have access to lower power plans because I have solar. I will never ever recoup the price of installing my panels, let alone make any gains. It was a complete con in some ways." Residential Consumer

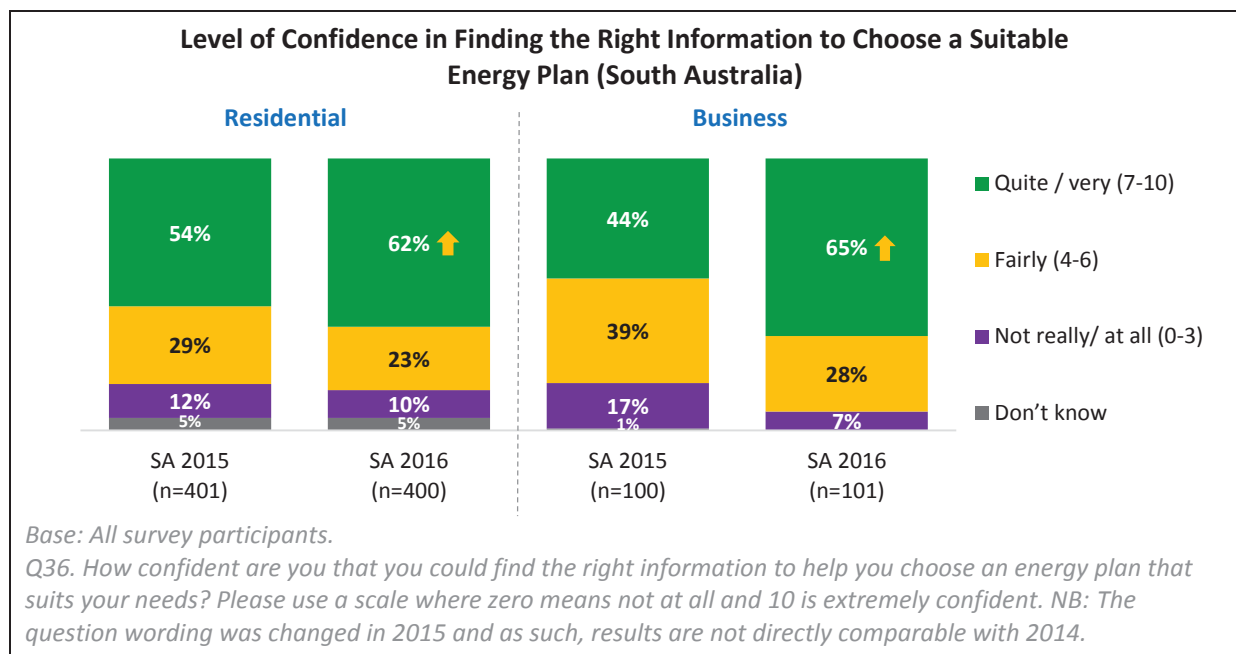
"What I was told by the salesperson was not what happened when I switched to them." Residential Consumer

"Did NOT wish to change but [one of the big three retailers] started to charge a fee for each meter." Business Consumer

"Was forced into it." Business Consumer

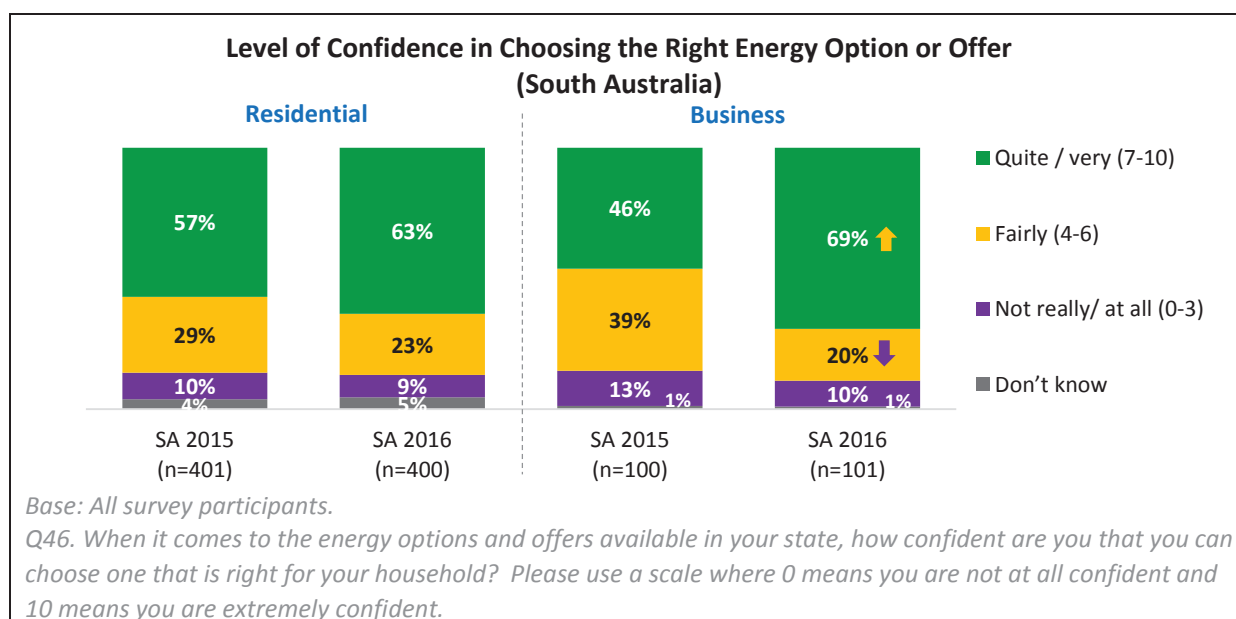
Compared to 2015, consumer confidence has increased in terms of finding the right information to choose a suitable energy plan

To further understand market outcomes, consumers were asked to rate their confidence on a couple of measures, on a scale where 0 meant not at all and 10 meant extremely confident. Confidence in finding the right information to choose a suitable energy plan increased significantly among consumers in 2016, with almost two thirds of consumers giving a high confidence rating of 7 or more (residential: 62% up from 54% in 2015, and business: 65% up from 44% in 2015).



Confidence in being able to choose the right energy offer is also increasing in South Australia

Around two thirds of residential consumers (63%) and seven in ten small business consumers (69%) were highly confident they could choose the right energy option for their household, giving a rating of 7 or more out of 10. For residents, this was a slight increase from 57% in 2015 and for small business consumers this was a *significant* increase from 46% in the previous year.



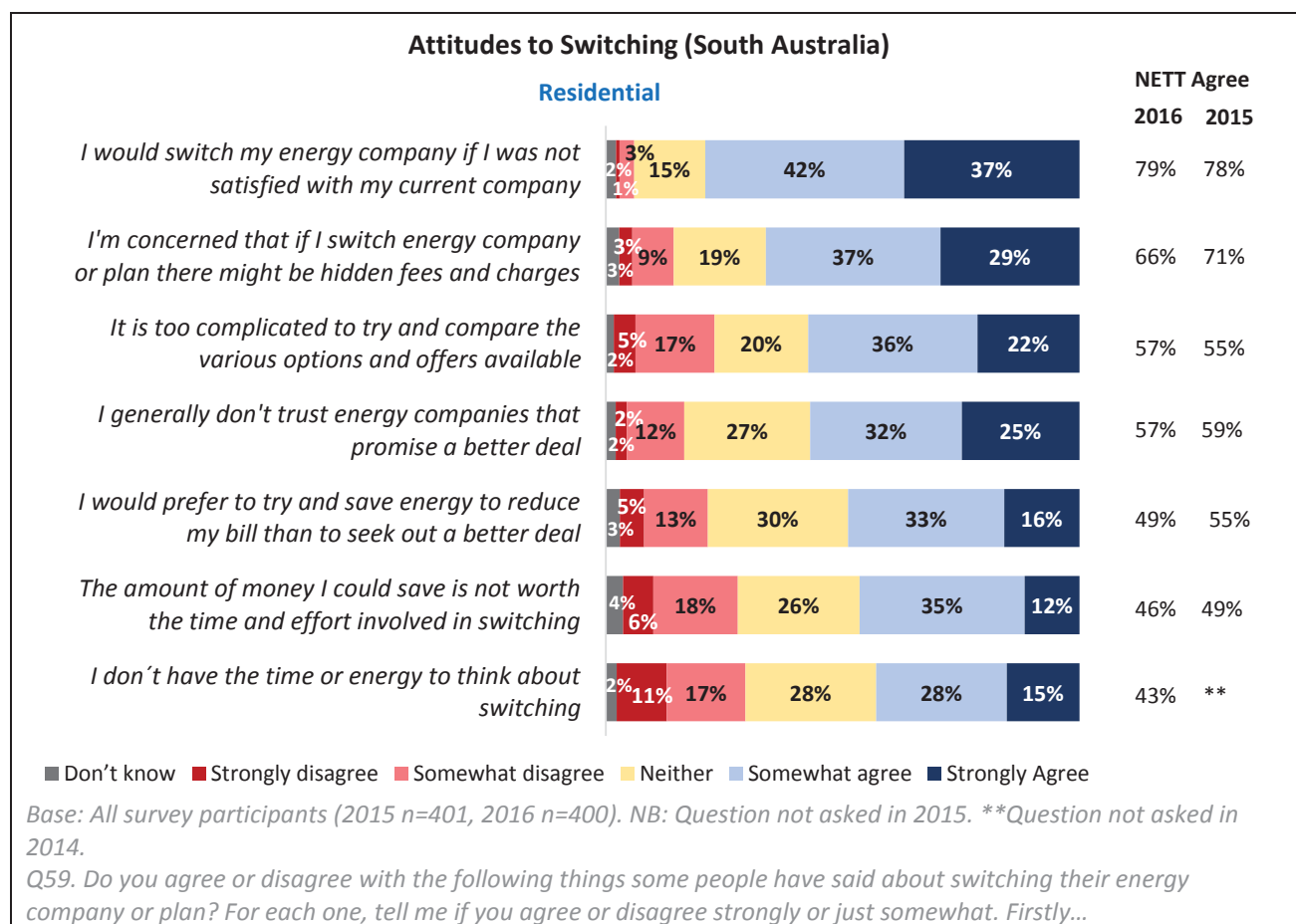
The majority of consumers agreed they would switch if they were not happy with their current company but many remained concerned about hidden fees and charges if they did switch

To further understand market outcomes and consumer sentiment, participants were asked the extent to which they agreed or disagreed with several statements about switching.

The strongest agreement levels were in line with 2015 findings for the statements: *I would switch my energy company if I was not satisfied with my current company* (79% residential, 84% small business) and *I'm concerned that if I switch there will be hidden fees and charges* (66% residential, 63% small business). Interestingly though, the level of concern about hidden fees and charges among *residential* customers decreased slightly this year (66% agreed in 2016 vs. 71% in 2015).

Consumers in South Australia were least likely to agree with the new statement: *I don't have the time or energy to think about switching* (residential: 43%, business: 36%), although this is clearly a barrier for some.

In line with 2015 results and pointing to a recognition of some of the benefits of switching, they remained less likely to agree: *I would prefer to try and save energy to reduce my bill than seek out a better deal* (residential: 49%, business: 41%) or *the amount of money I could save is not worth the time and effort involved in switching* (46%, 42%).

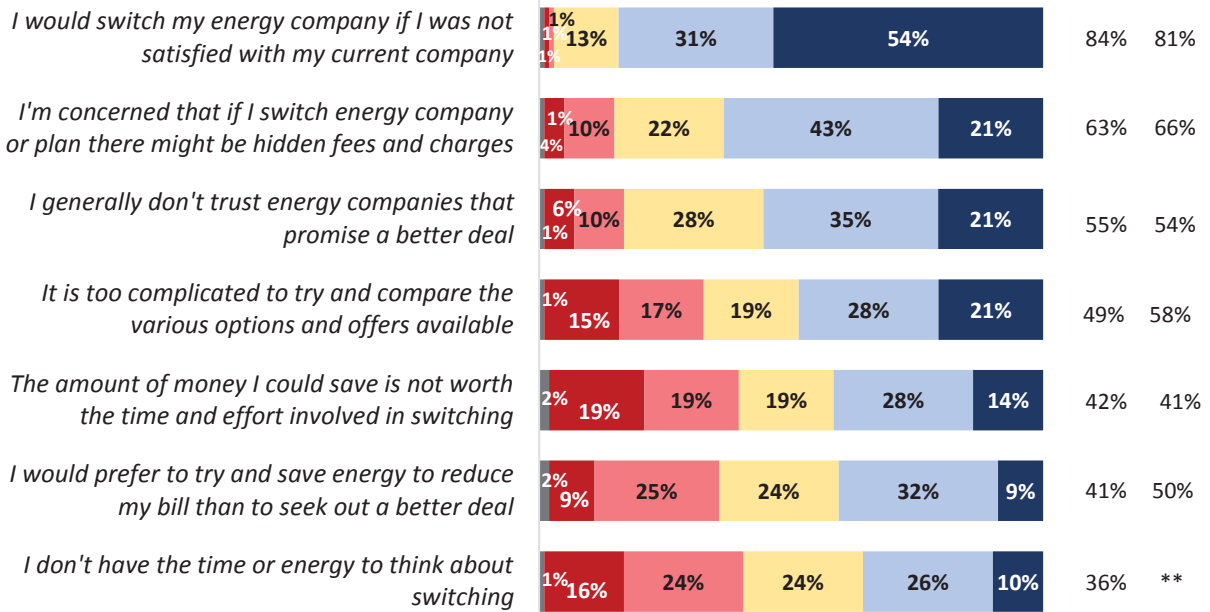


Attitudes to Switching (South Australia)

Business

NETT Agree

2016 2015



■ Don't know ■ Strongly disagree ■ Somewhat disagree ■ Neither ■ Somewhat agree ■ Strongly Agree

Base: All survey participants (2015 n=100, 2016 n=101). NB: Question not asked in 2015. **Question not asked in 2014.

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...

APPENDICES



Appendices

Appendix One: Quantitative Questionnaire

CATI Version (Residential Survey)

Quotas

NB: Three versions of the questionnaire were used in the 2016 study due to the mixed method and different consumer segments. However, as there were only minor differences, the residential online and business telephone (CATI) questionnaires are not shown here. The quotas below refer to all three questionnaires.

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	530	550	1,080
Online	1,620	-	1,620
Total	2,150	550	2,700

NB: Please also aim for the quota distributions below within 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.

Location, Gender, Age Quotas (Based on 2011 ABS Census data)

Res/bus	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
Residential	400	400	200	400	400	150	200	2,150
Small Business	100	100	50	100	100	50	50	550
Total	500	500	250	500	500	200	250	2,700

Location	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
Capital city	375	318	250	385	333	-	107	1,518
Rest of region	125	182		115	167	200	143	1,182
Total	500	500	250	500	500	200	250	2,700

Min. Targets	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
Has mains gas	280	148	132	192	52	0	0	804

Age / Gender (Res only)	Males	Females	Total
18-34	320	320	640
35-54	385	400	785
55+	340	385	725
Total	1,045	1,105	2,150

Introduction

Good morning / afternoon / evening, my name is [SAY NAME] and I'm calling on behalf of The Knowledge Warehouse and Newgate Research, which are market and social research companies.

We're conducting an important survey on behalf of the Australian Energy Market Commission which advises governments on energy matters that can affect consumers.

May I please speak with the person in the household who is 18 or over and who is mainly or jointly responsible for choosing the household's energy company?

REINTRODUCE IF NECESSARY

This survey is for research purposes only; we are not selling anything and it should only take about 20 minutes. Are you happy to go ahead? **IF YES, PROCEED. IF NO, SEEK AN APPOINTMENT TIME TO CALL BACK.**

SAY ONLY IF NECESSARY: Your responses will be treated in complete confidence. This is a confidential survey and none of your responses will be linked to you in any way. We are conducting the survey with a random sample of people across Australia, in accordance with the Privacy Act, which means your responses must be kept strictly confidential. **IF NECESSARY: Read out the Privacy Act [TKW TO INSERT]**

[**IF NECESSARY:** If you would like to check the bona fides of our research company and ensure we are not selling anything, you can call Surveyline on 1300 364 830. Surveyline is a national phone line that allows members of the public to check the bona fides of research companies.]

[**IF NECESSARY:** If you would like to call the Australian Energy Market Commission to verify this research you can call (02) 8296 7800 and ask to speak to Dominic Adams.]

NEW SCREEN - SAY TO ALL: During the course of this interview, my supervisor may listen in to check the quality of my work. . It may be helpful to have your most recent energy bills handy, but this is not essential.

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.

<p>Q1. What is the name of the company that you receive a bill from for your electricity use?</p> <p>SINGLE RESPONSE, DO NOT READ OUT</p>	<p>33. 1st Energy</p> <ol style="list-style-type: none"> 1. ActewAGL 2. AGL Energy 3. Alinta Energy 4. REMOVED 24. Aurora Energy 5. BlueNRG 6. Click Energy 25. Commander Power and Gas 28. CovaU 7. Diamond Energy 8. Dodo Power and Gas 9. EnergyAustralia 10. Ergon Energy 26. ERM Power 29. GloBird Energy 27. Go Energy 11. Lumo Energy 12. Momentum Energy 13. Neighbourhood Energy 14. Origin Energy 30. Pacific Hydro Retail 15. People Energy 31. Pooled Energy 16. Powerdirect 17. Powershop Australia 18. QEnergy 19. Red Energy 20. Sanctuary Energy 21. Simply Energy 32. Sumo Power 22. Other (specify) _____ 23. Don't know
--	---

<p>Q2. And how satisfied are you with your current electricity company? SINGLE RESPONSE, READ OUT</p> <p>IF NECESSARY: [INSERT FROM Q1]</p>	<ol style="list-style-type: none"> 1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. DNR: Don't know
---	--

Q3. How would you rate the overall quality of customer service provided by your <u>electricity company</u> ? Please use a scale where 0 means very poor and 10 is excellent. SINGLE RESPONSE												
Very poor											Excellent	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 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											Excellent	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	

Q5. Does your home currently have <u>piped</u> 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 receive a bill from for your mains connected gas use? SINGLE RESPONSE	1. ActewAGL Retail 2. AGL Energy 3. Alinta Energy 4. Aurora Energy 4. REMOVED 15. Click Energy 16. CovaU 5. Dodo Power and Gas 6. Energy Australia 7. Lumo Energy 17. Momentum Energy 8. Origin Energy 9. Red Energy 10. Simply Energy 13. Tas Gas Retail 11. Other (specify) _____ 12. Don't know
---	--

<p>Q7. How satisfied are you with your current gas company? SINGLE RESPONSE, READ OUT</p> <p>IF NECESSARY: [INSERT FROM Q6]</p>	<ol style="list-style-type: none"> 1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. DNR: Don't know
---	--

<p>Q8. How would you rate the overall quality of customer service provided by your <u>gas company</u>? Please use a scale where 0 means very poor and 10 is excellent. SINGLE RESPONSE</p>												
Very poor										Excellent		Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	
<p>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</p>												
Very poor										Excellent		Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	

Interest and Knowledge

ASK ALL

Q10. QUESTION REMOVED IN 2015

Q11. QUESTION REMOVED IN 2015

Q12. QUESTION REMOVED IN 2015

<p>Q13. Please tell me whether you think the following statements are True or False. Firstly, ... READ NEXT ITEM</p>			
RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM	True	False	Don't know
a. People in your state [if ACT] or territory can choose their electricity company	1	2	3
b. IF HAS GAS (Q5=1) People in your state [if ACT] or territory can choose their gas company	1	2	3
c. People in your state [if ACT] or territory can choose	1	2	3

from a range of different types of electricity plans, price structures, contract lengths and terms			
d. IF HAS GAS (Q5=1) People 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

Q14. QUESTION REMOVED	
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Q15. QUESTION REMOVED	
------------------------------	--

ASK ALL

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.

Not at all confident										Extremely confident	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11

<p>Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [if ACT] or territory?</p> <p>SINGLE RESPONSE, READ OUT</p>	<ol style="list-style-type: none"> 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 IN S/E QLD, VIC, NSW, SA, ACT, BUT NOT TAS OR REST OF QLD (GO TO Q34)

<p>Q17. A) In the past 5 years, how many times have you changed the following?</p> <p>ASK Q17B IMMEDIATELY AFTER EACH CODE IF Q17A NOT ZERO AT EACH</p> <p>B) IF Q17A=1: And was that in the last 12 months?</p> <p>IF Q17A>1</p>	<ol style="list-style-type: none"> 1. Your electricity <u>company</u> __ 2. From one <u>electricity plan</u> or deal to another offered by the same electricity company __ 3. IF HAS GAS (Q5=1) Your gas <u>company</u> __ 4. IF HAS GAS (Q5=1) From <u>one gas plan</u> or deal to another offered by the same gas company __
---	--

<p>And of those [INSERT from Q17A] times how many were in the past 12 months?</p> <p>READ OUT FOR EACH ITEM, ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99, INCLUDE N/A and D/K</p>	
---	--

<p>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</p>	<ol style="list-style-type: none"> 1. Yes 2. No 3. Cannot recall
--	---

ASK IF Q18=1

<p>Q19. How many different companies would you say have approached you in the past 12 months offering to sell you electricity or gas?</p>	<ol style="list-style-type: none"> 1. ___ ALLOW 1 TO 99 2. Cannot recall
---	---

ASK ALL

<p>Q20. In the past 12 months, have <u>you actively</u> investigated different offers or options that you could potentially switch to?</p>	<ol style="list-style-type: none"> 1. Yes 2. No 3. Don't know
--	--

ASK IF Q20=1

<p>Q20b And the last time you investigated energy offers or options, roughly how many hours did it take you to do this? DNRO, RECORD APPROPRIATE RESPONSE</p> <p>IF NECESSARY: Your best estimate is fine.</p>	<ol style="list-style-type: none"> 1. Less than 1 hour 2. 1 – 2 hours 3. 3 – 4 hours 4. 5 – 6 hours 5. 7 – 9 hours 6. 10 – 12 hours 7. More than 12 hours 8. Really can't recall
--	--

<p>Q21. QUESTION REMOVED IN 2015</p>	
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Switching Electricity

ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0). IF NOT SWITCHED, SKIP to Q27

<p>Q22. The last time you switched, what was the main reason you changed your <u>electricity company, plan or deal</u>?</p> <p>Any other reasons?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 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
---	---

<p>Q23. The last time you changed your <u>electricity company, plan or deal</u>, which information sources did you use to help with your decision? Any others?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p>	<ol style="list-style-type: none"> 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
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MULTIPLE RESPONSE OK	<p>advertisement</p> <p>12. Outdoor advertising e.g. billboards, buses</p> <p>13. Financial counsellor</p> <p>14. Community support organisation</p> <p>15. Looked at price / best price / saving</p> <p>18. A broker</p> <p>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</p> <p>16. Other (specify)_____</p> <p>17. Don't know</p>
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ASK IF PREV Q MULTIPLE RESPONSE OR NOT CODE 1 OR 20

<p>Q47. And which one of those information sources was most useful in helping with your decision to switch?</p> <p>(SAY IF NECESSARY: The last time you switched electricity company, plan or deal.)</p> <p>DO NOT READ OUT</p> <p>RECORD BEST FIT</p> <p>SINGLE RESPONSE</p>	<p>1. None of them were useful</p> <p>2. Door-to-door sales person visiting the home</p> <p>3. Received a call from a sales person</p> <p>4. Phoned retailer</p> <p>5. Brochures / flyers and other direct mail</p> <p>6. Google / general internet search</p> <p>7. Retailer website</p> <p>8. Price comparison website (specify)_____</p> <p>9. A friend or family member</p> <p>10. Media article/advertisement segment</p> <p>11. General advertising e.g. TV, Radio, Newspaper advertisement</p> <p>12. Outdoor advertising e.g. billboards, buses</p> <p>13. Financial counsellor</p> <p>14. Community support organisation</p> <p>15. Looked at price / best price / saving</p> <p>18. A broker</p> <p>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</p> <p>16. Other (specify)_____</p> <p>17. Don't know</p>
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Q48. QUESTION REMOVED	
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ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 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, plan or deal where 0 means not at all and 10 means extremely important? **RANDOMISE, REPEAT IF NECESSARY, ADD CODE 12=Not Applicable**

[NEW ITEMS: J-N]

- 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) **REMOVE ITEM**
- g) Availability of green / renewable energy plans
- h) The solar feed-in tariff offered by the company
- i) Whether the price can change during the contract
- j) The ability to purchase or access energy storage batteries from the electricity company
- k) The ability to purchase or access solar panels from the electricity company
- l) The electricity company offering access to live data about your energy use and costs **([FOR CATI, ONLY SAY IF NECESSARY:] e.g. an online portal, app, in-home energy display)**
- m) The daily supply / service charge
- n) The brand and reputation of the company

Not at all important										Extremely important	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11

Q24. QUESTION REMOVED IN 2015	1.
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ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0)

Q50. And having switched your electricity company, plan or deal, 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. ITEM REMOVED	1	2	3	4	5	6
c. ITEM REMOVED	1	2	3	4	5	6
d. [NEW ITEM] I was satisfied with the process involved in switching	1	2	3	4	5	6

ASK IF SOMEWHAT DISAGREE OR STRONGLY DISAGREE WITH Q50A

Q25. A. What were the main reasons why you were not happy with your decision to switch? RECORD VERBATIM	OPEN ENDED RESPONSE
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ASK IF SOMEWHAT AGREE OR STRONGLY AGREE WITH Q50A

Q25B. What were the main reasons why you were happy with your decision to switch? RECORD VERBATIM	OPEN ENDED RESPONSE
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ASK IF SWITCHED ELECTRICITY COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0)

<p>Q51. The last time you switched your <u>electricity company, plan or deal</u>, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?</p> <p>SINGLE RESPONSE, READ OUT</p>	<ol style="list-style-type: none"> 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
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Switching Gas

Q26. QUESTION REMOVED IN 2015	
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ASK IF SWITCHED GAS COMPANY OR PLAN IN THE PAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0). IF NOT SWITCHED, SKIP TO Q31.

<p>Q27. You mentioned you changed your gas company, plan or deal in the past five years.</p> <p>The last time you switched, what was the main reason?</p> <p>Any other reasons?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 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
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<p>Q28. The last time you changed your <u>gas company, plan or deal</u>, what information sources did you use to help with your decision? Any others?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 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
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ASK IF PREV Q MULTIPLE RESPONSE OR NOT CODE 1 OR 20

<p>Q52. And which one of those information sources was <u>most</u> useful in helping with your decision to switch?</p> <p>(SAY IF NECESSARY: The last time you switched gas company, plan or deal.)</p> <p>DO NOT READ OUT RECORD BEST FIT</p> <p>SINGLE RESPONSE</p>	<ol style="list-style-type: none"> 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
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Q53. **QUESTION REMOVED**

ASK IF SWITCHED GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

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, plan or deal where 0 means not at all and 10 means extremely important? **RANDOMISE, REPEAT IF NECESSARY, ADD CODE 12=Not Applicable**

- a) The price per megajoule (MJ)
- b) The estimated total bill amount
- c) Contract duration
- d) Whether you are locked into a contract
- e) The discounts offered
- f) **ITEM REMOVED**
- j) Whether the price can change during the contract

- k) The daily supply / service charge
- l) **ITEM REMOVED**

Not at all important										Extremely important	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11

Q29. **QUESTION REMOVED IN 2015**

ASK IF SWITCHED GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q55. And having switched your gas company, plan or deal, 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. ITEM REMOVED	1	2	3	4	5	6
c. ITEM REMOVED	1	2	3	4	5	6
d. [NEW ITEM] I was satisfied with the process involved in switching	1	2	3	4	5	6

ASK IF SOMEWHAT DISAGREE OR STRONGLY DISAGREE WITH Q55A

<p>Q30a. What were the main reasons why you were not happy with your decision to switch?</p> <p>RECORD VERBATIM</p>	<p>OPEN ENDED RESPONSE</p>
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ASK IF SOMEWHAT AGREE OR STRONGLY AGREE WITH Q55A

<p>Q30B. What were the main reasons why you were happy with your decision to switch?</p> <p>RECORD VERBATIM</p>	<p>OPEN ENDED RESPONSE</p>
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ASK IF SWITCHED GAS COMPANY OR PLAN IN THE PAST 5 YEARS (Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

<p>Q56. The last time you switched your <u>gas company, plan or deal</u>, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? SINGLE RESPONSE, READ OUT</p>	<ol style="list-style-type: none"> 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
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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). OTHERS SKIP TO Q33.

<p>Q31. You mentioned you previously investigated different offers or options that</p>	<ol style="list-style-type: none"> 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
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<p>you could potentially switch to.</p> <p>What information sources did you use in your last investigation?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 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
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<p>Q57. And which one of those information sources was <u>most</u> useful in helping with your decision whether or not to switch?</p> <p>(SAY IF NECESSARY: The last time you investigated energy offers or options.)</p> <p>DO NOT READ OUT RECORD BEST FIT</p> <p>SINGLE RESPONSE</p>	<ol style="list-style-type: none"> 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
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Q58. QUESTION REMOVED	
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<p>Q32.And what was the main reason why you investigated different offers and options but <u>haven't</u> changed your energy company or plan in the last 12 months? Any others?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 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
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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)

<p>Q33. Are there any reasons you <u>haven't</u> investigated different options or why you haven't changed your energy company or plan in the last 12 months? Any other reasons?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 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
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Future Intentions

ASK ALL

<p>Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?</p> <p>SINGLE RESPONSE, READ OUT</p>	<ol style="list-style-type: none"> 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
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ASK TAS AND REST OF QLD ONLY

Q34b And how important would it be for you to have a choice between a number of different electricity companies, where 0 means not at all important and 10 means extremely important? SINGLE RESPONSE												
Not at all important										Extremely important		Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	

ASK TAS AND REST OF QLD ONLY

Q34c And how important to you is having a choice between a number of different electricity plans and offers with the same company, using that same scale? IF NECESSARY: Where 0 means not at all important and 10 means extremely important. SINGLE RESPONSE												
Not at all important										Extremely important		Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	

Q35. QUESTION REMOVED IN 2015

ASK ALL

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 REPEAT SCALE IF NECESSARY, SINGLE RESPONSE												
Not at all confident										Extremely confident		Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11	

<p>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?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p>	<ol style="list-style-type: none"> 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
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MULTIPLE RESPONSE OK, RECORD FIRST MENTION	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
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<p>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...</p> <p>RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM</p>						
	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. ITEM REMOVED	1	2	3	4	5	6
h. [NEW ITEM] I don't have the time or energy to think about switching	1	2	3	4	5	6

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?	\$ ____ Enter amount to nearest dollar
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IF HAS GAS (Q5=1)

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?	\$ ____ Enter amount to nearest dollar
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Comparison Websites

ASK ALL

<p>Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their home? Any others?</p> <p>DO NOT READ OUT, RECORD BEST FIT</p> <p>MULTIPLE RESPONSE OK</p>	<ol style="list-style-type: none"> 1. Choice 2. Choosi 3. Compare The Market 4. Electricity Wizard 5. Energy watch 6. Energy Made Easy 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. ITEM REMOVED 15. Switch On 16. Switchwise 25. Take charge 17. U Choose 18. youcompare 19. Your Choice 26. yourenergy.nsw.gov.au 27. Victorian Energy Compare 20. Yahoo Energy Comparison 21. None of the above 22. Other (specify) _____ 23. Don't know
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IF NSW / ACT / SA / TAS: ASK IF NOT MENTIONED "Energy Made Easy" (Q38 ≠ 6)

Q39. Have you heard of the independent government comparator website called	<ol style="list-style-type: none"> 1. Yes 2. No 3. Don't know
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<p>IF NSW / QLD / ACT / SA/ TAS: Energy Made Easy?</p> <p>SINGLE RESPONSE</p>	
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IF VIC:

SKIP TO D1 IF MENTIONED “My Power Planner” AND “Victorian Energy Compare” (Q38=11 and 27)

<p>Q40. Have you heard of the independent government comparator [IF Q38≠11or 27] websites Victorian Energy Compare or My Power Planner...? / [IFQ38=11] website Victorian Energy Compare...? / [IFQ38=27] website My Power Planner]...? ALLOW MULTIPLE RESPONSE FOR CODES 1 AND 2 ONLY READ OUT CODES 1 AND 2</p>	<ol style="list-style-type: none"> 1. Victorian Energy Compare 2. My Power Planner 3. No, I haven't heard of either 4. Don't know
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Q62. QUESTION REMOVED	1.
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IF NSW: ASK IF NOT MENTIONED “yourenergy.nsw.gov.au” or “Power in Your Hands” (Q38 ≠ 24 or 26)

SKIP TO D1 IF MENTIONED “yourenergy.nsw.gov.au” AND “Power in Your Hands” ” (Q38=24 and 26)

<p>Q63. Have you heard of the Power is in your Hands campaign or the government website called yourenergy.nsw.gov.au? MULTIPLE RESPONSE [IF Q38≠24 or 26] websites yourenergy.nsw.gov.au or the campaign Power in Your Hands ...? [IFQ38=24] website yourenergy.nsw.gov.au ...? [IFQ38=26] campaign Power in Your Hands...? ALLOW MULTIPLE RESPONSE FOR CODES 1 AND 2 ONLY</p>	<ol style="list-style-type: none"> 1. Yes, Power in your hands campaign 2. Yes, yourenergy.nsw.gov.au 3. No, neither if these 4. Don't know
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Demographics

I just have some questions about you and your household, which are for analysis purposes only.

<p>D1. Which of the following applies to the home where you live? SINGLE RESPONSE</p>	<ol style="list-style-type: none"> 1. Own the home outright 2. Have been paying a mortgage for more
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	<p>than 12 months</p> <p>3. Started paying a mortgage in the last 12 months</p> <p>4. Renting</p> <p>5. Other (please specify)_____</p>
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<p>D2. A) Including you, how many people live in your household who are aged 18 years or over?</p> <p>B) And how many people aged under 18 years live in your household? ALLOW TWO DIGIT RESPONSE. DO NOT ALLOW 0 FOR TOTAL NUMBER OF PEOPLE IN HOUSEHOLD</p>	<p>a) __ are aged 18+ years</p> <p>b) are aged under 18 years</p>
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<p>D3. How much was your most recent <u>quarterly</u> electricity bill?</p> <p>IF NECESSARY: Your best estimate is fine.</p> <p>IF NOT BILLED QUARTERLY: refer to relevant bracket and help participant work out amount based on frequency of bill.</p> <p>SINGLE RESPONSE, DO NOT READ OUT</p>	<ol style="list-style-type: none"> 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
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D13. QUESTION REMOVED	
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D14. QUESTION REMOVED	1.
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D15. QUESTION REMOVED	
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D13-D15 INCORPORATED INTO D27

IF HAS GAS CONNECTED (Q5=1)

<p>D4. How much was your most recent <u>quarterly</u> gas bill?</p>	<ol style="list-style-type: none"> 1. Less than \$100 (< \$33 per month) 2. \$100 - \$199 (\$33 - <\$67 per month)
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<p>IF NECESSARY: Your best estimation of the cost is fine.</p> <p>IF NOT BILLED QUARTERLY: refer to relevant bracket and help participant work out amount based on frequency of bill.</p> <p>SINGLE RESPONSE, DO NOT READ OUT</p>	<ol style="list-style-type: none"> 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
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D16. QUESTION REMOVED	
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D17. QUESTION REMOVED	
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D18. QUESTION REMOVED	
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D16-D18 REMOVED BUT INCORPORATED INTO D27

ASK ALL

<p>D5. Does your household have solar panels or solar hot water?</p> <p>MULTIPLE RESPONSE</p>	<ol style="list-style-type: none"> 1. Yes – solar panels 2. Yes – solar hot water system 4. No, neither of these 3. Don't know
--	--

D5a. QUESTION REMOVED	1.
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D5b. QUESTION REMOVED	
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ASK IF DO NOT HAVE SOLAR PANELS (D5 CODE 1 NOT SELECTED)

<p>D5c. How likely do you think it is that you will have solar panels installed at your home within the next two years? Would you say you...</p> <p>SINGLE RESPONSE, READ OUT</p>	<ol style="list-style-type: none"> 1. Definitely will 2. Probably will 3. Might 4. Probably won't 5. Definitely won't
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ASK ALL

<p>D5d. And how likely do you think it is that you will have batteries for storing electricity installed at your home within the next two years? Would you say you...</p> <p>SINGLE RESPONSE, READ OUT</p>	<ol style="list-style-type: none"> 1. Already have them 2. Definitely will 3. Probably will 4. Might 5. Probably won't 6. Definitely won't
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D6. QUESTION REMOVED	
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D6a. QUESTION REMOVED	
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ASK ALL

<p>D7. In the last five years, how many times have you <u>changed</u> any of the following providers or companies with which you have products and services?</p> <p>RANDOMISE 1-7, READ OUT</p> <p>FOR EACH ITEM, ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99, INCLUDE N/A and D/K</p>	<ol style="list-style-type: none"> 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
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ASK FOR EACH OF CODES 1-7 SELECTED AT D7

<p>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? SINGLE RESPONSE, REPEAT SCALE IF NECESSARY</p>	<ol style="list-style-type: none"> 1. Very easy 2. Fairly easy 3. Neither easy nor difficult 4. Fairly difficult 5. Very difficult 6. DNR: Don't know
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	7. DNR: Cannot recall
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D8. QUESTION REMOVED IN 2015	
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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										Extremely comfortable	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 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)_____
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[NEW QUESTION] IF MORE THAN ONE PERSON IN HOUSEHOLD (SUM OF D2A AND D2B IS GREATER THAN 1):

D20. Not including yourself, how many of the other people in your household are employed on a full time or full time equivalent basis? [E.G.: They may be causal but work full time hours.]	1. __ ALLOW TWO DIGITS, INCLUDING ZERO. LOGIC CHECK NUMBER DOES NOT EXCEED NUMBER GIVEN AT D2 MINUS 1.
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QUESTION REINSTATED FROM 2014

D11. And, what is the highest level of education you have completed?	1. Primary school 2. Secondary school 3. College / TAFE 4. Undergraduate degree 5. Postgraduate degree 6. Other (specify)_____ 7. Prefer not to say_____
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[NEW QUESTION] – ASK THIS IN ONLINE AND BUSINESS CATI ONLY

D23. If an energy company offered a new technology or innovative service for businesses, which of the following would best describe you? Would you probably ...	1. Be one of the very first to know about and try it 2. Use it before most other businesses 3. Wait until others you know have used it before you do 4. Wait until most other businesses have used it before you do 5. Or would you probably not be interested, and only use it if you really had to?
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[NEW QUESTION] – ASK THIS IN ONLINE AND BUSINESS CATI ONLY

D28. In general, how willing are you to take risks, on a scale of 0 to 10, where 0 means not at all willing and 10 means very willing? SINGLE RESPONSE											
Not willing at all										Very willing	Don't Know
<input type="checkbox"/> 0	<input type="checkbox"/> 1	<input type="checkbox"/> 2	<input type="checkbox"/> 3	<input type="checkbox"/> 4	<input type="checkbox"/> 5	<input type="checkbox"/> 6	<input type="checkbox"/> 7	<input type="checkbox"/> 8	<input type="checkbox"/> 9	<input type="checkbox"/> 10	<input type="checkbox"/> 11

SAY TO ALL: The following questions are designed to help us better understand the values and experiences of different types of consumers, to help make a better energy market for all consumers. Some of them are quite personal and sensitive in nature. Please try your best to answer them as accurately as possible.

<p>D24. [NEW QUESTION] And, which of the following applies to you or your household? RANDOMISE. Please say yes or no after each one. In the past 12 months have you...</p> <ul style="list-style-type: none"> a) Had a baby b) [REMOVE FOR CATI] Moved out of the family home for the first time c) Missed or been late paying energy bills d) Had a reduction in household income (e.g. job loss, retirement) e) [REMOVE FOR CATI] Separated from my partner/spouse f) Had a member of the household pass away g) Had unforeseen circumstances that severely affected your financial situation 	<ul style="list-style-type: none"> 1. Yes 2. No 3. Don't know 4. Prefer not to say
--	--

[NEW QUESTION] IF YES AT D24C (MISSED / LATE BILL PAYMENT)

<p>D25. And are you on an energy plan that offers you a discount for paying on time? SINGLE RESPONSE</p>	<ul style="list-style-type: none"> 1. Yes, for electricity 2. Yes, for gas 3. Yes, for both electricity and gas 4. Not for electricity or gas 5. Don't know
---	--

[NEW QUESTION] IF D25=1-3

<p>D26. In the last 12 months, approximately how many bills have you paid late or missed paying (and therefore missed out on the discount for paying on time)?</p>	<p>ALLOW TWO DIGITS, NOT INCLUDING ZERO – LOGIC CHECK AGAINST D24c.</p>
--	--

[NEW QUESTION]

<p>D27. Which of the following applies to you or your household? Please say yes or no after each one. RANDOMISE.</p> <ul style="list-style-type: none"> a) Someone in your household has a disability, chronic illness or was recently seriously injured b) You are a single parent c) You identify as Aboriginal or Torres Strait Islander d) You prefer to speak a language other than English at home e) You moved here from a mainly non-English speaking country in the past 2 years f) You are currently experiencing financial difficulty g) You receive a government rebate or concession on your energy bills h) You have a special payment arrangement with your gas and/or electricity provider due to financial difficulty (e.g. weekly, fortnightly or monthly instalments) i) Most or all of your income is from a government payment (e.g. pension, Newstart, Austudy, etc.) j) REMOVE FOR CATI k) You have an active Health Care Card l) ITEM REMOVED 	<ul style="list-style-type: none"> 1. Yes 2. No 3. Don't know DNRO 4. Prefer not to say DNRO
--	--

[NEW QUESTION]

D29. And if your household's income stopped unexpectedly, for how long do you think your savings would be able to cover your essential expenses without financial support or assistance, would it be...? SINGLE RESPONSE	<ol style="list-style-type: none"> 1. Less than 3 months 2. Between 3 and 6 months (IF NECESSARY: More than 3 months but less than 6 months) 3. Between 6 and 12 months (IF NECESSARY: More than 6 months but less than 12 months) 4. At least 12 months 5. Really don't know DNRO 6. Prefer not to say DNRO
---	--

<p>D19. 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.</p> <p>SINGLE RESPONSE</p>	<ol style="list-style-type: none"> 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 TKW. 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: Participant Profile

Residential Participants

Residential Respondent Profile		Jurisdiction							
		NEM	SEQ	ROQ	NSW	ACT	VIC	TAS	SA
	(n=)	1983	425	150	480	200	478	200	400
Location	Metro	71%	69%	0%	67%	100%	75%	33%	78%
	Regional	29%	31%	100%	33%	0%	25%	67%	22%
Age Group	18 - 34	29%	20%	12%	33%	17%	33%	19%	23%
	35 - 54	33%	32%	27%	34%	27%	33%	32%	33%
	55+	37%	48%	61%	33%	56%	34%	49%	44%
Gender	Male	48%	46%	46%	49%	55%	48%	49%	49%
	Female	52%	54%	54%	51%	45%	52%	51%	51%
Electricity Company	Origin Energy	26%	47%	13%	27%	10%	15%	0%	20%
	AGL Energy	25%	22%	1%	28%	5%	20%	0%	38%
	EnergyAustralia	18%	8%	1%	25%	5%	17%	2%	11%
	Lumo Energy	6%	3%	2%	3%	0%	10%	0%	8%
	Simply Energy	5%	0%	0%	1%	0%	9%	0%	13%
	Red Energy	4%	0%	0%	3%	0%	10%	0%	1%
	ActewAGL	3%	0%	0%	2%	77%	0%	0%	0%
	Click Energy	2%	6%	0%	2%	0%	1%	0%	0%
	Dodo Power and Gas	1%	1%	1%	1%	0%	3%	0%	1%
	Momentum Energy	1%	0%	0%	1%	0%	4%	0%	0%
	Alinta Energy	1%	0%	0%	0%	1%	2%	1%	4%
	Powerdirect	1%	2%	0%	1%	0%	1%	0%	2%
	Powershop Australia	1%	0%	0%	1%	0%	2%	0%	0%
	Ergon Energy	1%	5%	77%	0%	0%	0%	0%	0%
	Aurora Energy	0%	0%	0%	0%	0%	0%	89%	0%
	Other	2%	2%	4%	2%	0%	3%	5%	2%
	Don't know	3%	3%	2%	3%	2%	2%	3%	2%
Gas	Mains Connected	50%	19%	6%	45%	67%	73%	11%	54%
	Not Connected (Electricity Only)	46%	80%	93%	50%	30%	22%	88%	44%
Gas Company	AGL Energy	36%	22%	0%	58%	12%	23%	0%	31%
	Origin Energy	23%	66%	50%	17%	5%	18%	8%	40%
	Energy Australia	15%	4%	0%	17%	2%	17%	9%	12%
	Lumo Energy	5%	0%	0%	0%	0%	11%	0%	3%
	Simply Energy	5%	0%	0%	0%	0%	9%	0%	8%
	Red Energy	5%	0%	0%	1%	0%	9%	0%	1%
	ActewAGL Retail	4%	0%	10%	3%	78%	2%	0%	0%
	Dodo Power and Gas	2%	3%	0%	1%	0%	3%	0%	0%
	Momentum Energy	1%	0%	0%	0%	0%	2%	0%	0%
	Alinta Energy	1%	0%	0%	1%	0%	1%	4%	2%
	Aurora Energy	0%	0%	0%	0%	0%	0%	47%	0%
	Tas Gas Retail	0%	0%	0%	0%	0%	0%	31%	0%
	Other	1%	4%	0%	0%	1%	0%	0%	1%
	Don't know	3%	1%	39%	3%	4%	3%	0%	2%
Have electricity and gas with same provider	Yes	38%	13%	1%	34%	55%	53%	1%	42%
	No	62%	87%	99%	66%	45%	47%	99%	58%
Home Ownership	Own Home Outright	39%	40%	49%	39%	46%	36%	47%	39%
	Paying Off Mortgage	30%	28%	27%	30%	33%	30%	28%	31%
	Renting	30%	30%	24%	30%	20%	33%	22%	29%
	Other	1%	1%	1%	1%	1%	0%	3%	1%
Number in Household	One or Two	80%	84%	87%	77%	80%	80%	86%	86%
	Three or Four	18%	13%	12%	21%	18%	19%	14%	14%
	Five or Six	2%	2%	1%	2%	2%	1%	0%	1%
Employment	Working FT / PT / Casual	52%	44%	30%	52%	48%	57%	47%	46%
	Retired	25%	34%	44%	22%	39%	22%	36%	30%
	Other	24%	23%	29%	27%	13%	22%	18%	26%
Household Income (Annual)	Low (<\$50k)	32%	37%	50%	31%	16%	30%	45%	44%
	Medium (\$50k -<\$100k)	31%	32%	32%	30%	38%	32%	27%	28%
	High (>\$100k)	23%	20%	12%	26%	35%	22%	15%	18%

Residential Participants (Cont'd)

Residential Respondent Profile		Jurisdiction							
		NEM	SEQ	ROQ	NSW	ACT	VIC	TAS	SA
	(n=)	1983	425	150	480	200	478	200	400
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	37%	40%	35%	35%	38%	38%	22%	37%
	Medium (\$300 to \$499)	29%	29%	37%	30%	21%	28%	36%	30%
	High (\$500+)	24%	23%	22%	24%	28%	23%	33%	24%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	36%	53%	42%	32%	24%	39%	34%	30%
	Medium (\$200 to \$300)	24%	13%	11%	27%	12%	22%	27%	33%
	High (\$300+)	30%	24%	11%	30%	46%	29%	32%	30%
Currently Receiving Rebate or Concession (Electricity or Gas)	Yes	32%	41%	51%	28%	24%	30%	44%	39%
	No	63%	54%	47%	66%	70%	65%	52%	56%
Solar	Solar PVs	24%	32%	38%	20%	24%	19%	21%	37%
	No Solar PVs	76%	68%	62%	80%	76%	81%	79%	63%
	Solar Hot Water	12%	14%	19%	12%	13%	11%	8%	11%
	Neither	69%	63%	57%	71%	70%	73%	77%	57%
Customer Segments	Vulnerable Low Income	12%	11%	16%	12%	5%	12%	11%	17%
	Vulnerable Mid Income	8%	8%	10%	9%	4%	7%	4%	5%
	Vulnerable High Income	4%	3%	1%	4%	1%	5%	1%	3%
	Low Income Retired	13%	19%	27%	11%	12%	12%	24%	18%
	Average	20%	19%	17%	23%	15%	18%	22%	21%
	Secure Retired	12%	14%	14%	11%	25%	9%	13%	12%
	Secure High Income	31%	25%	15%	30%	36%	36%	26%	25%
Willingness To Take Risks	Low (0-4)	25%	29%	22%	23%	24%	26%	30%	27%
	Medium (5-7)	52%	51%	60%	58%	57%	44%	53%	49%
	High (8-10)	23%	20%	18%	19%	20%	30%	18%	24%
Technology Adopter	Innovator	10%	5%	5%	10%	3%	13%	7%	6%
	Early Adopter	20%	19%	16%	21%	18%	20%	18%	16%
	Early Majority	42%	41%	42%	45%	49%	37%	45%	44%
	Late Majority	18%	21%	25%	16%	22%	19%	21%	21%
	Laggard	11%	13%	12%	9%	8%	12%	9%	13%
Comfort using the internet	Not Really / Fairly (0-7)	18%	23%	22%	16%	16%	16%	24%	19%
	Quite / Very (8-10)	82%	76%	78%	83%	83%	83%	74%	79%

Business Participants

Business Respondent Profile		Jurisdiction							
		NEM	SEQ	ROQ	NSW	ACT	VIC	TAS	SA
	(n=)	452	100	50	100	50	101	51	101
Location	Metro	71%	69%	0%	67%	100%	75%	33%	78%
	Regional	29%	31%	100%	33%	0%	25%	67%	22%
Industry or Primary Purpose of Business	Construction	9%	12%	10%	7%	18%	11%	10%	5%
	Professional, Scientific and Technical Services	20%	21%	4%	24%	34%	13%	13%	18%
	Rental, Hiring and Real Estate Services	5%	5%	4%	6%	0%	4%	0%	4%
	Agriculture, Forestry and Fishing	6%	3%	14%	7%	0%	5%	9%	12%
	Financial and Insurance Services	7%	4%	0%	7%	6%	10%	1%	4%
	Retail Trade	7%	16%	20%	4%	8%	4%	12%	11%
	Transport, Postal and Warehousing	5%	5%	6%	4%	4%	7%	5%	4%
	Health Care and Social Assistance	7%	5%	14%	8%	14%	7%	13%	2%
	Manufacturing	5%	4%	8%	2%	2%	6%	15%	14%
	Accommodation and Food Services	4%	3%	12%	4%	2%	5%	6%	5%
	Administrative and Support Services	9%	13%	4%	8%	6%	7%	7%	9%
	Wholesale Trade	7%	4%	2%	6%	0%	10%	3%	7%
	Other	10%	5%	2%	13%	6%	11%	5%	6%

Business Participants (Cont'd)

Business Respondent Profile		Jurisdiction							
		NEM	SEQ	ROQ	NSW	ACT	VIC	TAS	SA
	(n=)	452	100	50	100	50	101	51	101
Electricity Company	AGL Energy	27%	24%	0%	30%	14%	20%	0%	41%
	Origin Energy	26%	45%	2%	28%	4%	20%	0%	12%
	EnergyAustralia	19%	7%	0%	32%	0%	13%	0%	10%
	Lumo Energy	4%	3%	0%	0%	0%	11%	0%	5%
	Momentum Energy	4%	0%	0%	0%	0%	11%	0%	9%
	Ergon Energy	1%	5%	92%	0%	0%	0%	0%	0%
	ActewAGL	2%	0%	0%	2%	74%	0%	0%	0%
	Powerdirect	2%	2%	0%	1%	0%	2%	0%	3%
	Aurora Energy	0%	0%	0%	0%	0%	1%	95%	0%
	Simply Energy	3%	0%	0%	0%	0%	6%	0%	11%
	Click Energy	2%	7%	0%	2%	0%	0%	0%	0%
	Red Energy	2%	0%	0%	0%	0%	8%	0%	1%
	Alinta Energy	0%	0%	0%	0%	0%	0%	0%	4%
	Dodo Power and Gas	1%	1%	0%	1%	0%	0%	0%	0%
	Powershop Australia	1%	0%	0%	0%	0%	2%	0%	0%
	Other	5%	5%	6%	4%	6%	6%	5%	4%
	Don't know	1%	1%	0%	0%	2%	1%	0%	1%
Gas	Mains connected	26%	11%	4%	26%	24%	36%	4%	23%
	Not Connected	74%	89%	96%	73%	74%	64%	96%	77%
Gas Company	AGL Energy	51%	60%	0%	66%	9%	41%	0%	35%
	Origin Energy	17%	30%	50%	12%	0%	18%	0%	30%
	Energy Australia	17%	10%	0%	22%	0%	15%	0%	20%
	Lumo Energy	7%	0%	0%	0%	0%	15%	0%	5%
	Simply Energy	5%	0%	0%	0%	0%	9%	0%	10%
	ActewAGL Retail	2%	0%	0%	0%	82%	0%	0%	0%
	Red Energy	1%	0%	0%	0%	0%	3%	0%	0%
	Alinta Energy	0%	0%	0%	0%	0%	0%	0%	0%
	Dodo Power and Gas	0%	0%	0%	0%	0%	0%	0%	0%
	Tas Gas Retail	0%	0%	0%	0%	0%	0%	100%	0%
	Momentum Energy	0%	0%	0%	0%	0%	0%	0%	0%
	Aurora Energy	0%	0%	0%	0%	0%	0%	0%	0%
	Other	0%	0%	50%	0%	0%	0%	0%	0%
	Don't know	0%	0%	0%	0%	9%	0%	0%	0%
Premises Ownership	Leasing	42%	34%	36%	47%	44%	42%	30%	32%
	Own Premises Outright	57%	62%	64%	53%	54%	58%	67%	66%
	Other	1%	4%	0%	0%	2%	0%	2%	2%
Number of Employees	<20	86%	86%	96%	86%	78%	85%	87%	89%
	20-99	12%	12%	4%	11%	22%	13%	10%	10%
	100+	2%	2%	0%	3%	0%	2%	2%	1%
Electricity Spend (Last Quarterly Bill)	Low (<\$500)	51%	58%	36%	54%	36%	48%	38%	42%
	Medium (\$500 - \$999)	26%	30%	28%	25%	22%	28%	20%	19%
	High \$1,000+	23%	12%	36%	21%	42%	24%	41%	40%
Gas Spend (Last Quarterly Bill)	\$150 or less	34%	30%	50%	37%	25%	33%	64%	35%
	\$151 to \$349	35%	40%	50%	35%	42%	33%	0%	35%
	\$350+	31%	30%	0%	28%	33%	34%	36%	31%
Solar	Solar PVs	21%	32%	32%	18%	10%	17%	22%	28%
	No Solar PVs	79%	68%	68%	82%	90%	83%	78%	72%
	Solar Hot Water	6%	8%	16%	5%	2%	5%	6%	10%
	Neither	77%	67%	66%	81%	90%	80%	73%	68%
Technology Adopter	Innovator	5%	7%	14%	4%	8%	4%	9%	4%
	Early Adopter	17%	17%	10%	18%	10%	18%	18%	16%
	Early Majority	50%	54%	44%	49%	46%	49%	44%	53%
	Late Majority	19%	14%	28%	21%	22%	19%	19%	20%
	Laggard	9%	7%	4%	8%	14%	10%	10%	8%
Willingness to Take Risks	Low (0-4)	20%	18%	30%	17%	30%	21%	30%	24%
	Medium (5-7)	58%	52%	62%	65%	58%	53%	45%	60%
	High (8-10)	21%	29%	8%	18%	12%	23%	22%	15%

Appendix Three: NEM Tables

NB: Tables with total base size of n=<30 are not displayed.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		1983	93%
Location	Metro	1457	93%
	Regional	526	93%
Gas (Dual Fuel)	Yes	991	93%
	No (Electricity only)	929	93%
Age Group	18 - 34	494	89%
	35 - 54	799	94%
	55+	690	95%
Home Ownership	Owners	1374	93%
	Renters / Other	609	92%
Household Income (Annual)	Low (<\$50k)	627	95%
	Medium (\$50k -<\$100k)	628	91%
	High (>\$100k)	480	96%
Employment	Working FT / PT / Casual	1052	93%
	Retired	482	95%
	Other	477	91%
Solar	Solar PVs	507	95%
	No Solar PVs	1476	92%
	Solar hot water	236	90%
	Neither	1339	93%
Switched Energy Company or Plan	In the past 12 months	473	95%
	1 to 5 years ago	468	97%
	NETT switched (Last 5 yrs)	941	96%
	Have not switched at all	1042	90%
Approached by Energy Company (Last 12 Months)	Yes	693	96%
	No	1101	92%
Actively Investigated Options	Yes	557	95%
	No	1373	93%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	93%
	Medium (\$300 to \$499)	566	96%
	High (\$500+)	481	93%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	94%
	Medium (\$200 to \$300)	235	93%
	High (\$300+)	308	95%
Customer Segments	Vulnerable Low Income	252	95%
	Vulnerable Mid Income	145	92%
	Vulnerable High Income	74	95%
	Low Income Retired	252	95%
	Average	396	89%
	Secure Retired	216	96%
	Secure High Income	648	93%
Willingness To Take Risks	Low (0-4)	392	92%
	Medium (5-7)	782	93%
	High (8-10)	359	94%
Technology Adopter	Innovator	130	91%
	Early Adopter	294	94%
	Early Majority	660	94%
	Late Majority	295	91%
	Laggard	170	89%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q13. Please tell me whether you think the following statements are True or False. b) Consumers in your state [territory] can choose their gas company.			
		(n=)	True
Total		991	90%
Location	Metro	835	90%
	Regional	156	87%
Gas (Dual Fuel)	Yes	991	90%
	No (Electricity only)	0	-
Age Group	18 - 34	264	85%
	35 - 54	407	92%
	55+	320	91%
Home Ownership	Owners	729	89%
	Renters / Other	262	90%
Household Income (Annual)	Low (<\$50k)	267	92%
	Medium (\$50k -<\$100k)	347	89%
	High (>\$100k)	258	89%
Employment	Working FT / PT / Casual	561	89%
	Retired	219	90%
	Other	226	89%
Solar	Solar PVs	252	91%
	No Solar PVs	739	89%
	Solar hot water	92	90%
	Neither	680	89%
Switched Energy Company or Plan	In the past 12 months	278	94%
	1 to 5 years ago	216	96%
	NETT switched (Last 5 yrs)	494	95%
	Have not switched at all	497	84%
Approached by Energy Company (Last 12 Months)	Yes	423	93%
	No	480	87%
Actively Investigated Options	Yes	297	92%
	No	669	89%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	382	90%
	Medium (\$300 to \$499)	300	92%
	High (\$500+)	209	91%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	91%
	Medium (\$200 to \$300)	235	93%
	High (\$300+)	308	89%
Customer Segments	Vulnerable Low Income	116	93%
	Vulnerable Mid Income	67	84%
	Vulnerable High Income	55	83%
	Low Income Retired	108	90%
	Average	185	91%
	Secure Retired	106	90%
	Secure High Income	354	90%
Willingness To Take Risks	Low (0-4)	182	91%
	Medium (5-7)	391	88%
	High (8-10)	223	91%
Technology Adopter	Innovator	86	89%
	Early Adopter	178	89%
	Early Majority	324	90%
	Late Majority	136	91%
	Laggard	75	88%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		1983	82%
Location	Metro	1457	82%
	Regional	526	82%
Gas (Dual Fuel)	Yes	991	82%
	No (Electricity only)	929	83%
Age Group	18 - 34	494	79%
	35 - 54	799	82%
	55+	690	85%
Home Ownership	Owners	1374	84%
	Renters / Other	609	78%
Household Income (Annual)	Low (<\$50k)	627	82%
	Medium (\$50k -<\$100k)	628	82%
	High (>\$100k)	480	87%
Employment	Working FT / PT / Casual	1052	83%
	Retired	482	85%
	Other	477	78%
Solar	Solar PVs	507	86%
	No Solar PVs	1476	81%
	Solar hot water	236	85%
	Neither	1339	82%
Switched Energy Company or Plan	In the past 12 months	473	87%
	1 to 5 years ago	468	84%
	NETT switched (Last 5 yrs)	941	86%
	Have not switched at all	1042	79%
Approached by Energy Company (Last 12 Months)	Yes	693	86%
	No	1101	81%
Actively Investigated Options	Yes	557	87%
	No	1373	81%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	84%
	Medium (\$300 to \$499)	566	84%
	High (\$500+)	481	81%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	82%
	Medium (\$200 to \$300)	235	86%
	High (\$300+)	308	82%
Customer Segments	Vulnerable Low Income	252	82%
	Vulnerable Mid Income	145	67%
	Vulnerable High Income	74	76%
	Low Income Retired	252	84%
	Average	396	78%
	Secure Retired	216	88%
	Secure High Income	648	87%
Willingness To Take Risks	Low (0-4)	392	81%
	Medium (5-7)	782	81%
	High (8-10)	359	85%
Technology Adopter	Innovator	130	84%
	Early Adopter	294	86%
	Early Majority	660	83%
	Late Majority	295	75%
	Laggard	170	76%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		991	77%
Location	Metro	835	78%
	Regional	156	73%
Gas (Dual Fuel)	Yes	991	77%
	No (Electricity only)	0	-
Age Group	18 - 34	264	75%
	35 - 54	407	80%
	55+	320	76%
Home Ownership	Owners	729	77%
	Renters / Other	262	74%
Household Income (Annual)	Low (<\$50k)	267	75%
	Medium (\$50k -<\$100k)	347	80%
	High (>\$100k)	258	76%
Employment	Working FT / PT / Casual	561	77%
	Retired	219	77%
	Other	226	74%
Solar	Solar PVs	252	75%
	No Solar PVs	739	77%
	Solar hot water	92	76%
	Neither	680	78%
Switched Energy Company or Plan	In the past 12 months	278	79%
	1 to 5 years ago	216	77%
	NETT switched (Last 5 yrs)	494	78%
	Have not switched at all	497	75%
Approached by Energy Company (Last 12 Months)	Yes	423	77%
	No	480	76%
Actively Investigated Options	Yes	297	80%
	No	669	75%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	382	77%
	Medium (\$300 to \$499)	300	78%
	High (\$500+)	209	76%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	75%
	Medium (\$200 to \$300)	235	81%
	High (\$300+)	308	75%
Customer Segments	Vulnerable Low Income	116	79%
	Vulnerable Mid Income	67	59%
	Vulnerable High Income	55	74%
	Low Income Retired	108	73%
	Average	185	75%
	Secure Retired	106	80%
	Secure High Income	354	81%
Willingness To Take Risks	Low (0-4)	182	79%
	Medium (5-7)	391	73%
	High (8-10)	223	82%
Technology Adopter	Innovator	86	85%
	Early Adopter	178	80%
	Early Majority	324	76%
	Late Majority	136	73%
	Laggard	75	66%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?			
		(n=)	Yes
Total		1983	30%
Location	Metro	1457	29%
	Regional	526	32%
Gas (Dual Fuel)	Yes	991	32%
	No (Electricity only)	929	29%
Age Group	18 - 34	494	28%
	35 - 54	799	29%
	55+	690	33%
Home Ownership	Owners	1374	31%
	Renters / Other	609	27%
Household Income (Annual)	Low (<\$50k)	627	30%
	Medium (\$50k -<\$100k)	628	31%
	High (>\$100k)	480	33%
Employment	Working FT / PT / Casual	1052	30%
	Retired	482	31%
	Other	477	30%
Solar	Solar PVs	507	38%
	No Solar PVs	1476	27%
	Solar hot water	236	39%
	Neither	1339	27%
Switched Energy Company or Plan	In the past 12 months	473	58%
	1 to 5 years ago	468	26%
	NETT switched (Last 5 yrs)	941	43%
	Have not switched at all	1042	18%
Approached by Energy Company (Last 12 Months)	Yes	693	43%
	No	1101	23%
Actively Investigated Options	Yes	557	100%
	No	1373	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	31%
	Medium (\$300 to \$499)	566	29%
	High (\$500+)	481	34%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	32%
	Medium (\$200 to \$300)	235	33%
	High (\$300+)	308	34%
Customer Segments	Vulnerable Low Income	252	30%
	Vulnerable Mid Income	145	32%
	Vulnerable High Income	74	63%
	Low Income Retired	252	26%
	Average	396	27%
	Secure Retired	216	37%
	Secure High Income	648	26%
Willingness To Take Risks	Low (0-4)	392	25%
	Medium (5-7)	782	28%
	High (8-10)	359	42%
Technology Adopter	Innovator	130	42%
	Early Adopter	294	39%
	Early Majority	660	30%
	Late Majority	295	23%
	Laggard	170	17%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q51. The last time you switched your electricity company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		916	64%	16%
Location	Metro	645	63%	17%
	Regional	271	65%	15%
Gas (Dual Fuel)	Yes	469	64%	16%
	No (Electricity only)	430	63%	17%
Age Group	18 - 34	198	69%	11%
	35 - 54	387	60%	20%
	55+	331	64%	16%
Home Ownership	Owners	651	64%	16%
	Renters / Other	265	63%	16%
Household Income (Annual)	Low (<\$50k)	305	62%	16%
	Medium (\$50k -<\$100k)	284	72%	13%
	High (>\$100k)	218	58%	21%
Employment	Working FT / PT / Casual	481	65%	17%
	Retired	222	60%	18%
	Other	228	63%	16%
Solar	Solar PVs	247	64%	17%
	No Solar PVs	669	64%	16%
	Solar hot water	124	64%	16%
	Neither	609	63%	16%
Switched Energy Company or Plan	In the past 12 months	459	65%	17%
	1 to 5 years ago	457	63%	16%
	NETT switched (Last 5 yrs)	916	64%	16%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	422	63%	21%
	No	418	66%	11%
Actively Investigated Options	Yes	379	69%	18%
	No	523	60%	15%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	352	68%	12%
	Medium (\$300 to \$499)	297	64%	20%
	High (\$500+)	198	60%	22%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	156	69%	13%
	Medium (\$200 to \$300)	121	63%	21%
	High (\$300+)	151	65%	16%
Customer Segments	Vulnerable Low Income	135	61%	18%
	Vulnerable Mid Income	73	58%	22%
	Vulnerable High Income	35	80%	8%
	Low Income Retired	120	63%	13%
	Average	180	64%	17%
	Secure Retired	99	58%	25%
	Secure High Income	274	67%	12%
Willingness To Take Risks	Low (0-4)	155	56%	17%
	Medium (5-7)	358	64%	13%
	High (8-10)	175	75%	8%
Technology Adopter	Innovator	53	66%	16%
	Early Adopter	158	73%	13%
	Early Majority	306	63%	12%
	Late Majority	120	63%	14%
	Laggard	55	61%	12%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q56. The last time you switched your gas company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		351	64%	13%
Location	Metro	307	64%	13%
	Regional	44	63%	11%
Gas (Dual Fuel)	Yes	351	64%	13%
	No (Electricity only)	0	-	-
Age Group	18 - 34	82	71%	7%
	35 - 54	156	65%	13%
	55+	113	58%	16%
Home Ownership	Owners	261	63%	13%
	Renters / Other	90	65%	11%
Household Income (Annual)	Low (<\$50k)	93	66%	12%
	Medium (\$50k -<\$100k)	129	64%	11%
	High (>\$100k)	86	62%	15%
Employment	Working FT / PT / Casual	211	69%	12%
	Retired	68	58%	17%
	Other	77	56%	11%
Solar	Solar PVs	86	68%	10%
	No Solar PVs	265	62%	14%
	Solar hot water	31	67%	3%
	Neither	244	62%	15%
Switched Energy Company or Plan	In the past 12 months	210	66%	13%
	1 to 5 years ago	141	60%	14%
	NETT switched (Last 5 yrs)	351	64%	13%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	173	61%	18%
	No	151	67%	7%
Actively Investigated Options	Yes	152	71%	16%
	No	192	58%	11%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	131	65%	10%
	Medium (\$300 to \$499)	120	64%	17%
	High (\$500+)	73	63%	14%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	115	63%	9%
	Medium (\$200 to \$300)	94	63%	17%
	High (\$300+)	118	68%	13%
Customer Segments	Vulnerable Low Income	46	57%	15%
	Vulnerable Mid Income	23	62%*	8%*
	Vulnerable High Income	20	84%*	0%*
	Low Income Retired	36	58%	20%
	Average	66	63%	12%
	Secure Retired	32	57%	15%
	Secure High Income	128	67%	13%
Willingness To Take Risks	Low (0-4)	54	55%	12%
	Medium (5-7)	143	61%	12%
	High (8-10)	86	76%	9%
Technology Adopter	Innovator	27	79%*	7%*
	Early Adopter	74	73%	15%
	Early Majority	120	58%	10%
	Late Majority	48	64%	9%
	Laggard	15	49%*	11%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q17a. In the past 5 years, how many times have you changed the following? Q17b. And was that in the last 12 months?					
		(n=)	% Changed in past 12 months	% Changed in past 5 years	% Not Switched in Last 5 Years
Total		1983	26%	49%	51%
Location	Metro	1457	26%	48%	52%
	Regional	526	25%	53%	47%
Gas (Dual Fuel)	Yes	991	29%	52%	48%
	No (Electricity only)	929	22%	49%	51%
Age Group	18 - 34	494	25%	41%	59%
	35 - 54	799	26%	51%	49%
	55+	690	26%	55%	45%
Home Ownership	Owners	1374	26%	51%	49%
	Renters / Other	609	25%	47%	53%
Household Income (Annual)	Low (<\$50k)	627	28%	53%	47%
	Medium (\$50k -<\$100k)	628	26%	48%	52%
	High (>\$100k)	480	23%	48%	52%
Employment	Working FT / PT / Casual	1052	25%	47%	53%
	Retired	482	25%	54%	46%
	Other	477	28%	50%	50%
Solar	Solar PVs	507	26%	52%	48%
	No Solar PVs	1476	26%	48%	52%
	Solar hot water	236	29%	57%	43%
	Neither	1339	25%	49%	51%
Switched Energy Company or Plan	In the past 12 months	473	100%	100%	0%
	1 to 5 years ago	468	0%	100%	0%
	NETT switched (Last 5 yrs)	941	52%	100%	0%
	Have not switched at all	1042	0%	0%	100%
Approached by Energy Company (Last 12 Months)	Yes	693	36%	63%	37%
	No	1101	20%	41%	59%
Actively Investigated Options	Yes	557	50%	70%	30%
	No	1373	15%	41%	59%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	27%	53%	47%
	Medium (\$300 to \$499)	566	26%	54%	46%
	High (\$500+)	481	26%	44%	56%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	29%	52%	48%
	Medium (\$200 to \$300)	235	31%	55%	45%
	High (\$300+)	308	33%	53%	47%
Customer Segments	Vulnerable Low Income	252	31%	56%	44%
	Vulnerable Mid Income	145	25%	50%	50%
	Vulnerable High Income	74	42%	48%	52%
	Low Income Retired	252	22%	54%	46%
	Average	396	25%	48%	52%
	Secure Retired	216	30%	55%	45%
	Secure High Income	648	22%	44%	56%
Willingness To Take Risks	Low (0-4)	392	22%	44%	56%
	Medium (5-7)	782	26%	49%	51%
	High (8-10)	359	31%	52%	48%
Technology Adopter	Innovator	130	25%	40%	60%
	Early Adopter	294	33%	55%	45%
	Early Majority	660	26%	50%	50%
	Late Majority	295	25%	48%	52%
	Laggard	170	16%	33%	67%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?			
		(n=)	Yes
Total		1983	38%
Location	Metro	1457	37%
	Regional	526	40%
Gas (Dual Fuel)	Yes	991	45%
	No (Electricity only)	929	30%
Age Group	18 - 34	494	36%
	35 - 54	799	35%
	55+	690	41%
Home Ownership	Owners	1374	40%
	Renters / Other	609	34%
Household Income (Annual)	Low (<\$50k)	627	37%
	Medium (\$50k -<\$100k)	628	38%
	High (>\$100k)	480	39%
Employment	Working FT / PT / Casual	1052	36%
	Retired	482	41%
	Other	477	38%
Solar	Solar PVs	507	44%
	No Solar PVs	1476	36%
	Solar hot water	236	45%
	Neither	1339	36%
Switched Energy Company or Plan	In the past 12 months	473	53%
	1 to 5 years ago	468	43%
	NETT switched (Last 5 yrs)	941	48%
	Have not switched at all	1042	27%
Approached by Energy Company (Last 12 Months)	Yes	693	100%
	No	1101	0%
Actively Investigated Options	Yes	557	54%
	No	1373	31%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	38%
	Medium (\$300 to \$499)	566	42%
	High (\$500+)	481	36%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	46%
	Medium (\$200 to \$300)	235	42%
	High (\$300+)	308	51%
Customer Segments	Vulnerable Low Income	252	42%
	Vulnerable Mid Income	145	45%
	Vulnerable High Income	74	65%
	Low Income Retired	252	36%
	Average	396	33%
	Secure Retired	216	46%
	Secure High Income	648	31%
Willingness To Take Risks	Low (0-4)	392	32%
	Medium (5-7)	782	35%
	High (8-10)	359	43%
Technology Adopter	Innovator	130	45%
	Early Adopter	294	39%
	Early Majority	660	35%
	Late Majority	295	29%
	Laggard	170	33%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal.

		(n=)	Importance Rating (NETT 8+)						
			The price per kilowatt hour (kWh)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Availability of green energy plans	The solar feed-in tariff on offer
Total		916	74%	69%	48%	55%	80%	29%	32%
Location	Metro	645	71%	69%	47%	56%	78%	29%	31%
	Regional	271	79%	71%	51%	53%	84%	29%	34%
Gas (Dual Fuel)	Yes	469	74%	71%	49%	57%	82%	32%	32%
	No (Electricity only)	430	74%	68%	47%	53%	78%	26%	32%
Age Group	18 - 34	198	54%	64%	45%	54%	67%	35%	33%
	35 - 54	387	76%	71%	46%	55%	82%	32%	33%
	55+	331	83%	72%	52%	56%	87%	24%	31%
Home Ownership	Owners	651	77%	72%	50%	56%	82%	29%	38%
	Renters / Other	265	67%	64%	45%	54%	75%	31%	19%
Household Income (Annual)	Low (<\$50k)	305	74%	72%	53%	56%	83%	30%	34%
	Medium (\$50k -<\$100k)	284	76%	67%	43%	58%	81%	30%	30%
	High (>\$100k)	218	70%	68%	45%	52%	73%	29%	34%
Employment	Working FT / PT / Casual	481	68%	69%	44%	54%	77%	33%	35%
	Retired	222	83%	72%	53%	53%	84%	22%	31%
	Other	228	74%	67%	53%	59%	82%	31%	29%
Solar	Solar PVs	247	78%	76%	51%	53%	81%	37%	79%
	No Solar PVs	669	72%	67%	48%	56%	80%	27%	17%
	Solar hot water	124	72%	63%	47%	57%	78%	28%	56%
	Neither	609	73%	69%	48%	56%	80%	27%	16%
Switched Energy Company or Plan	In the past 12 months	459	74%	71%	49%	57%	82%	31%	30%
	1 to 5 years ago	457	73%	67%	47%	53%	78%	28%	34%
	NETT switched (Last 5 yrs)	916	74%	69%	48%	55%	80%	29%	32%
	Have not switched at all	0	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	422	75%	71%	53%	60%	80%	31%	34%
	No	418	73%	69%	45%	51%	80%	29%	32%
Actively Investigated Options	Yes	379	79%	73%	52%	59%	84%	32%	35%
	No	523	70%	67%	46%	52%	77%	28%	31%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	352	71%	68%	47%	54%	79%	29%	35%
	Medium (\$300 to \$499)	297	76%	73%	53%	60%	82%	30%	32%
	High (\$500+)	198	80%	71%	47%	55%	83%	28%	30%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	156	74%	70%	41%	58%	81%	26%	25%
	Medium (\$200 to \$300)	121	77%	73%	61%	61%	87%	34%	40%
	High (\$300+)	151	73%	71%	51%	54%	80%	38%	36%
Customer Segments	Vulnerable Low Income	135	72%	72%	48%	62%	85%	32%	28%
	Vulnerable Mid Income	73	77%	74%	66%	66%	78%	44%	29%
	Vulnerable High Income	35	58%	70%	64%	62%	60%	51%	57%
	Low Income Retired	120	85%	65%	53%	54%	85%	21%	25%
	Average	180	67%	66%	44%	53%	81%	27%	37%
	Secure Retired	99	81%	80%	52%	51%	83%	20%	36%
	Secure High Income	274	72%	67%	41%	52%	77%	31%	30%
Willingness To Take Risks	Low (0-4)	155	80%	68%	56%	60%	82%	23%	28%
	Medium (5-7)	358	72%	69%	47%	53%	80%	26%	31%
	High (8-10)	175	78%	75%	58%	64%	86%	43%	39%
Technology Adopter	Innovator	53	75%	77%	62%	68%	75%	50%	48%
	Early Adopter	158	75%	74%	54%	58%	76%	40%	44%
	Early Majority	306	76%	67%	52%	59%	85%	26%	27%
	Late Majority	120	71%	66%	45%	56%	87%	21%	24%
	Laggard	55	76%	80%	47%	42%	81%	17%	32%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal. (Cont'd)

		(n=)	Importance Rating (NETT 8+)					
			Whether the price per kilowatt hour (kWh) can change during the contract	The ability to purchase or access energy storage batteries from the electricity company	The ability to purchase or access solar panels from the electricity company	The electricity company offering access to live data about your energy use and costs	The daily supply / service charge	The brand and reputation of the company
Total		916	63%	16%	20%	28%	67%	52%
Location	Metro	645	61%	18%	22%	31%	63%	51%
	Regional	271	68%	11%	16%	23%	74%	55%
Gas (Dual Fuel)	Yes	469	64%	21%	24%	33%	69%	53%
	No (Electricity only)	430	63%	9%	15%	23%	65%	52%
Age Group	18 - 34	198	55%	27%	32%	38%	56%	45%
	35 - 54	387	66%	17%	19%	33%	68%	49%
	55+	331	66%	8%	14%	19%	72%	60%
Home Ownership	Owners	651	64%	16%	22%	29%	69%	53%
	Renters / Other	265	60%	15%	16%	27%	62%	50%
Household Income (Annual)	Low (<\$50k)	305	70%	14%	17%	27%	71%	58%
	Medium (\$50k -<\$100k)	284	60%	17%	22%	27%	67%	49%
	High (>\$100k)	218	58%	14%	20%	33%	61%	49%
Employment	Working FT / PT / Casual	481	59%	18%	23%	34%	61%	48%
	Retired	222	69%	9%	13%	17%	73%	58%
	Other	228	67%	17%	21%	29%	70%	55%
Solar	Solar PVs	247	68%	23%	32%	31%	68%	57%
	No Solar PVs	669	61%	13%	16%	28%	66%	51%
	Solar hot water	124	66%	22%	28%	30%	62%	55%
	Neither	609	62%	12%	15%	27%	67%	51%
Switched Energy Company or Plan	In the past 12 months	459	64%	17%	22%	32%	69%	55%
	1 to 5 years ago	457	63%	15%	18%	25%	65%	49%
	NETT switched (Last 5 yrs)	916	63%	16%	20%	28%	67%	52%
	Have not switched at all	0	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	422	64%	15%	22%	29%	66%	52%
	No	418	63%	17%	19%	28%	68%	54%
Actively Investigated Options	Yes	379	67%	16%	19%	31%	74%	52%
	No	523	61%	16%	21%	27%	61%	52%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	352	64%	13%	18%	26%	68%	53%
	Medium (\$300 to \$499)	297	67%	17%	22%	31%	68%	55%
	High (\$500+)	198	64%	19%	23%	33%	67%	53%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	156	62%	16%	17%	30%	70%	52%
	Medium (\$200 to \$300)	121	63%	24%	20%	31%	72%	58%
	High (\$300+)	151	67%	27%	36%	41%	67%	52%
Customer Segments	Vulnerable Low Income	135	69%	17%	19%	30%	72%	59%
	Vulnerable Mid Income	73	81%	21%	22%	38%	75%	50%
	Vulnerable High Income	35	74%	47%	57%	55%	63%	57%
	Low Income Retired	120	72%	7%	8%	16%	77%	63%
	Average	180	54%	15%	21%	28%	58%	51%
	Secure Retired	99	64%	10%	16%	16%	68%	51%
Willingness To Take Risks	Secure High Income	274	56%	17%	22%	34%	63%	45%
	Low (0-4)	155	67%	10%	16%	25%	74%	64%
	Medium (5-7)	358	58%	16%	19%	26%	66%	53%
Technology Adopter	High (8-10)	175	72%	28%	34%	43%	80%	57%
	Innovator	53	74%	45%	46%	47%	67%	62%
	Early Adopter	158	67%	25%	33%	40%	76%	54%
	Early Majority	306	61%	16%	19%	28%	69%	56%
	Late Majority	120	58%	8%	14%	18%	69%	52%
	Laggard	55	68%	4%	6%	23%	78%	70%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q54. Below is a range of factors that people might consider when changing their gas company, plan or deal. For each one please rate how important it was in your decision to switch your gas company or plan.										
		(n=)	Importance Rating (NETT 8+)							
			The price per megajoule (MJ)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Whether the price can change during the contract	The daily supply / service charge	The brand and reputation of the company
Total		351	77%	74%	56%	56%	85%	64%	73%	9%
Location	Metro	307	76%	73%	53%	53%	85%	62%	70%	9%
	Regional	44	85%	76%	71%	68%	88%	75%	87%	0%
Gas (Dual Fuel)	Yes	351	77%	74%	56%	56%	85%	64%	73%	9%
	No (Electricity only)	0	-	-	-	-	-	-	-	-
Age Group	18 - 34	82	67%	77%	51%	56%	81%	61%	68%	0%
	35 - 54	156	80%	69%	61%	56%	85%	60%	72%	0%
	55+	113	81%	76%	55%	54%	89%	69%	76%	12%
Home Ownership	Owners	261	79%	75%	56%	56%	86%	64%	74%	9%
	Renters / Other	90	71%	71%	56%	54%	84%	62%	70%	0%
Household Income (Annual)	Low (<\$50k)	93	79%	76%	59%	57%	87%	69%	72%	100%
	Medium (\$50k -<\$100k)	129	78%	71%	48%	53%	83%	65%	80%	0%
	High (>\$100k)	86	75%	72%	60%	52%	84%	55%	63%	0%
Employment	Working FT / PT / Casual	211	76%	75%	54%	53%	83%	60%	71%	0%
	Retired	68	83%	75%	57%	57%	92%	74%	81%	43%
	Other	77	74%	70%	61%	62%	85%	63%	69%	0%
Solar	Solar PVs	86	75%	75%	54%	50%	87%	60%	68%	22%
	No Solar PVs	265	78%	73%	57%	57%	85%	65%	74%	0%
	Solar hot water	31	66%	64%	51%	54%	65%	57%	61%	0%
	Neither	244	79%	74%	57%	58%	87%	65%	75%	0%
Switched Energy Company or Plan	In the past 12 months	210	74%	77%	59%	58%	86%	67%	75%	14%
	1 to 5 years ago	141	81%	69%	52%	52%	84%	58%	70%	0%
	NETT switched (Last 5 yrs)	351	77%	74%	56%	56%	85%	64%	73%	9%
	Have not switched at all	0	-	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	173	77%	74%	60%	61%	86%	62%	74%	0%
	No	151	78%	72%	53%	50%	84%	65%	71%	17%
Actively Investigated Options	Yes	152	82%	80%	65%	62%	88%	69%	77%	0%
	No	192	73%	68%	49%	50%	83%	59%	69%	22%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	131	74%	71%	52%	50%	89%	67%	73%	100%
	Medium (\$300 to \$499)	120	81%	77%	62%	64%	86%	63%	72%	0%
	High (\$500+)	73	79%	73%	54%	52%	83%	57%	73%	0%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	115	77%	69%	49%	49%	88%	63%	73%	0%
	Medium (\$200 to \$300)	94	77%	73%	67%	65%	89%	64%	73%	37%
	High (\$300+)	118	80%	81%	56%	57%	82%	65%	72%	0%
Customer Segments	Vulnerable Low Income	46	75%	70%	60%	61%	93%	55%	66%	0%
	Vulnerable Mid Income	23	83%*	69%*	60%*	60%*	73%*	67%*	81%*	0%*
	Vulnerable High Income	20	75%*	74%*	59%*	69%*	76%*	52%*	62%*	0%*
	Low Income Retired	36	93%	82%	66%	67%	89%	81%	88%	100%
	Average	66	70%	71%	58%	58%	83%	70%	71%	0%
	Secure Retired	32	72%	67%	48%	47%	96%	66%	73%	0%
	Secure High Income	128	77%	77%	52%	48%	83%	57%	71%	0%
Willingness To Take Risks	Low (0-4)	54	84%	71%	64%	64%	83%	72%	84%	0%
	Medium (5-7)	143	73%	73%	54%	52%	87%	66%	75%	0%
	High (8-10)	86	85%	83%	61%	61%	86%	70%	77%	20%
Technology Adopter	Innovator	27	88%*	85%*	68%*	71%*	80%*	73%*	83%*	0%*
	Early Adopter	74	86%	76%	62%	61%	89%	75%	80%	0%
	Early Majority	120	73%	77%	57%	55%	86%	65%	79%	27%
	Late Majority	48	76%	68%	51%	52%	85%	68%	67%	0%
	Laggard	15	84%*	70%*	60%*	54%*	86%*	60%*	84%*	0%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		1983	33%	10%	47%
Location	Metro	1457	32%	9%	49%
	Regional	526	37%	10%	44%
Gas (Dual Fuel)	Yes	991	31%	10%	50%
	No (Electricity only)	929	37%	9%	45%
Age Group	18 - 34	494	27%	8%	54%
	35 - 54	799	32%	9%	50%
	55+	690	40%	12%	40%
Home Ownership	Owners	1374	32%	10%	49%
	Renters / Other	609	36%	9%	43%
Household Income (Annual)	Low (<\$50k)	627	40%	10%	40%
	Medium (\$50k -<\$100k)	628	28%	11%	53%
	High (>\$100k)	480	30%	6%	56%
Employment	Working FT / PT / Casual	1052	30%	8%	54%
	Retired	482	42%	12%	37%
	Other	477	32%	10%	45%
Solar	Solar PVs	507	36%	9%	48%
	No Solar PVs	1476	33%	10%	47%
	Solar hot water	236	35%	10%	47%
	Neither	1339	33%	10%	48%
Switched Energy Company or Plan	In the past 12 months	473	23%	27%	47%
	1 to 5 years ago	468	27%	9%	58%
	NETT switched (Last 5 yrs)	941	25%	18%	52%
	Have not switched at all	1042	42%	1%	43%
Approached by Energy Company (Last 12 Months)	Yes	693	31%	12%	53%
	No	1101	35%	9%	44%
Actively Investigated Options	Yes	557	19%	15%	62%
	No	1373	41%	7%	41%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	41%	10%	42%
	Medium (\$300 to \$499)	566	31%	11%	48%
	High (\$500+)	481	24%	9%	60%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	36%	10%	47%
	Medium (\$200 to \$300)	235	36%	10%	45%
	High (\$300+)	308	21%	10%	61%
Customer Segments	Vulnerable Low Income	252	34%	11%	45%
	Vulnerable Mid Income	145	24%	7%	65%
	Vulnerable High Income	74	11%	7%	79%
	Low Income Retired	252	48%	10%	32%
	Average	396	35%	11%	39%
	Secure Retired	216	35%	15%	43%
	Secure High Income	648	31%	7%	53%
Willingness To Take Risks	Low (0-4)	392	40%	8%	39%
	Medium (5-7)	782	32%	11%	47%
	High (8-10)	359	22%	8%	59%
Technology Adopter	Innovator	130	13%	7%	65%
	Early Adopter	294	18%	10%	60%
	Early Majority	660	31%	11%	49%
	Late Majority	295	40%	12%	38%
	Laggard	170	60%	2%	18%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		1983	73%
Location	Metro	1457	74%
	Regional	526	70%
Gas (Dual Fuel)	Yes	991	75%
	No (Electricity only)	929	72%
Age Group	18 - 34	494	78%
	35 - 54	799	68%
	55+	690	73%
Home Ownership	Owners	1374	75%
	Renters / Other	609	68%
Household Income (Annual)	Low (<\$50k)	627	73%
	Medium (\$50k -<\$100k)	628	75%
	High (>\$100k)	480	74%
Employment	Working FT / PT / Casual	1052	75%
	Retired	482	74%
	Other	477	67%
Solar	Solar PVs	507	77%
	No Solar PVs	1476	72%
	Solar hot water	236	82%
	Neither	1339	71%
Switched Energy Company or Plan	In the past 12 months	473	75%
	1 to 5 years ago	468	74%
	NETT switched (Last 5 yrs)	941	75%
	Have not switched at all	1042	71%
Approached by Energy Company (Last 12 Months)	Yes	693	73%
	No	1101	74%
Actively Investigated Options	Yes	557	70%
	No	1373	75%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	79%
	Medium (\$300 to \$499)	566	74%
	High (\$500+)	481	66%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	77%
	Medium (\$200 to \$300)	235	75%
	High (\$300+)	308	75%
Customer Segments	Vulnerable Low Income	252	70%
	Vulnerable Mid Income	145	58%
	Vulnerable High Income	74	93%
	Low Income Retired	252	77%
	Average	396	70%
	Secure Retired	216	71%
	Secure High Income	648	76%
Willingness To Take Risks	Low (0-4)	392	71%
	Medium (5-7)	782	71%
	High (8-10)	359	79%
Technology Adopter	Innovator	130	87%
	Early Adopter	294	72%
	Early Majority	660	71%
	Late Majority	295	73%
	Laggard	170	69%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q7. How satisfied are you with your current gas company?			
		(n=)	Satisfied
Total		991	73%
Location	Metro	835	74%
	Regional	156	69%
Gas (Dual Fuel)	Yes	991	73%
	No (Electricity only)	0	-
Age Group	18 - 34	264	81%
	35 - 54	407	68%
	55+	320	70%
Home Ownership	Owners	729	75%
	Renters / Other	262	65%
Household Income (Annual)	Low (<\$50k)	267	68%
	Medium (\$50k -<\$100k)	347	77%
	High (>\$100k)	258	77%
Employment	Working FT / PT / Casual	561	76%
	Retired	219	69%
	Other	226	68%
Solar	Solar PVs	252	79%
	No Solar PVs	739	71%
	Solar hot water	92	82%
	Neither	680	70%
Switched Energy Company or Plan	In the past 12 months	278	70%
	1 to 5 years ago	216	73%
	NETT switched (Last 5 yrs)	494	71%
	Have not switched at all	497	74%
Approached by Energy Company (Last 12 Months)	Yes	423	72%
	No	480	73%
Actively Investigated Options	Yes	297	66%
	No	669	75%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	382	74%
	Medium (\$300 to \$499)	300	73%
	High (\$500+)	209	70%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	74%
	Medium (\$200 to \$300)	235	73%
	High (\$300+)	308	73%
Customer Segments	Vulnerable Low Income	116	67%
	Vulnerable Mid Income	67	63%
	Vulnerable High Income	55	96%
	Low Income Retired	108	72%
	Average	185	71%
	Secure Retired	106	67%
	Secure High Income	354	75%
Willingness To Take Risks	Low (0-4)	182	74%
	Medium (5-7)	391	67%
	High (8-10)	223	80%
Technology Adopter	Innovator	86	88%
	Early Adopter	178	71%
	Early Majority	324	67%
	Late Majority	136	71%
	Laggard	75	80%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		1983	71%
Location	Metro	1457	72%
	Regional	526	68%
Gas (Dual Fuel)	Yes	991	72%
	No (Electricity only)	929	71%
Age Group	18 - 34	494	74%
	35 - 54	799	64%
	55+	690	74%
Home Ownership	Owners	1374	73%
	Renters / Other	609	66%
Household Income (Annual)	Low (<\$50k)	627	73%
	Medium (\$50k -<\$100k)	628	73%
	High (>\$100k)	480	70%
Employment	Working FT / PT / Casual	1052	70%
	Retired	482	76%
	Other	477	66%
Solar	Solar PVs	507	75%
	No Solar PVs	1476	69%
	Solar hot water	236	76%
	Neither	1339	69%
Switched Energy Company or Plan	In the past 12 months	473	73%
	1 to 5 years ago	468	71%
	NETT switched (Last 5 yrs)	941	72%
	Have not switched at all	1042	70%
Approached by Energy Company (Last 12 Months)	Yes	693	72%
	No	1101	72%
Actively Investigated Options	Yes	557	70%
	No	1373	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	76%
	Medium (\$300 to \$499)	566	74%
	High (\$500+)	481	64%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	77%
	Medium (\$200 to \$300)	235	73%
	High (\$300+)	308	69%
Customer Segments	Vulnerable Low Income	252	66%
	Vulnerable Mid Income	145	57%
	Vulnerable High Income	74	89%
	Low Income Retired	252	79%
	Average	396	69%
	Secure Retired	216	73%
	Secure High Income	648	70%
Willingness To Take Risks	Low (0-4)	392	68%
	Medium (5-7)	782	69%
	High (8-10)	359	84%
Technology Adopter	Innovator	130	83%
	Early Adopter	294	75%
	Early Majority	660	72%
	Late Majority	295	67%
	Laggard	170	62%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q8. How would you rate the overall quality of customer service provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		991	68%
Location	Metro	835	69%
	Regional	156	63%
Gas (Dual Fuel)	Yes	991	68%
	No (Electricity only)	0	-
Age Group	18 - 34	264	77%
	35 - 54	407	61%
	55+	320	66%
Home Ownership	Owners	729	70%
	Renters / Other	262	61%
Household Income (Annual)	Low (<\$50k)	267	67%
	Medium (\$50k -<\$100k)	347	70%
	High (>\$100k)	258	69%
Employment	Working FT / PT / Casual	561	69%
	Retired	219	68%
	Other	226	64%
Solar	Solar PVs	252	75%
	No Solar PVs	739	65%
	Solar hot water	92	73%
	Neither	680	65%
Switched Energy Company or Plan	In the past 12 months	278	65%
	1 to 5 years ago	216	70%
	NETT switched (Last 5 yrs)	494	67%
	Have not switched at all	497	68%
Approached by Energy Company (Last 12 Months)	Yes	423	67%
	No	480	70%
Actively Investigated Options	Yes	297	63%
	No	669	70%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	382	72%
	Medium (\$300 to \$499)	300	68%
	High (\$500+)	209	63%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	72%
	Medium (\$200 to \$300)	235	70%
	High (\$300+)	308	67%
Customer Segments	Vulnerable Low Income	116	61%
	Vulnerable Mid Income	67	52%
	Vulnerable High Income	55	90%
	Low Income Retired	108	71%
	Average	185	68%
	Secure Retired	106	66%
	Secure High Income	354	69%
Willingness To Take Risks	Low (0-4)	182	62%
	Medium (5-7)	391	65%
	High (8-10)	223	82%
Technology Adopter	Innovator	86	87%
	Early Adopter	178	71%
	Early Majority	324	65%
	Late Majority	136	62%
	Laggard	75	71%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		1983	62%
Location	Metro	1457	63%
	Regional	526	60%
Gas (Dual Fuel)	Yes	991	66%
	No (Electricity only)	929	59%
Age Group	18 - 34	494	71%
	35 - 54	799	54%
	55+	690	63%
Home Ownership	Owners	1374	65%
	Renters / Other	609	57%
Household Income (Annual)	Low (<\$50k)	627	63%
	Medium (\$50k -<\$100k)	628	64%
	High (>\$100k)	480	65%
Employment	Working FT / PT / Casual	1052	63%
	Retired	482	65%
	Other	477	57%
Solar	Solar PVs	507	67%
	No Solar PVs	1476	61%
	Solar hot water	236	67%
	Neither	1339	60%
Switched Energy Company or Plan	In the past 12 months	473	66%
	1 to 5 years ago	468	58%
	NETT switched (Last 5 yrs)	941	62%
	Have not switched at all	1042	62%
Approached by Energy Company (Last 12 Months)	Yes	693	63%
	No	1101	63%
Actively Investigated Options	Yes	557	59%
	No	1373	64%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	68%
	Medium (\$300 to \$499)	566	62%
	High (\$500+)	481	57%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	68%
	Medium (\$200 to \$300)	235	67%
	High (\$300+)	308	66%
Customer Segments	Vulnerable Low Income	252	52%
	Vulnerable Mid Income	145	44%
	Vulnerable High Income	74	80%
	Low Income Retired	252	69%
	Average	396	61%
	Secure Retired	216	62%
	Secure High Income	648	67%
Willingness To Take Risks	Low (0-4)	392	58%
	Medium (5-7)	782	62%
	High (8-10)	359	75%
Technology Adopter	Innovator	130	79%
	Early Adopter	294	65%
	Early Majority	660	61%
	Late Majority	295	59%
	Laggard	170	63%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q9. How would you rate the overall value for money of the products and services provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		991	66%
Location	Metro	835	67%
	Regional	156	63%
Gas (Dual Fuel)	Yes	991	66%
	No (Electricity only)	0	-
Age Group	18 - 34	264	80%
	35 - 54	407	55%
	55+	320	63%
Home Ownership	Owners	729	70%
	Renters / Other	262	55%
Household Income (Annual)	Low (<\$50k)	267	65%
	Medium (\$50k -<\$100k)	347	68%
	High (>\$100k)	258	69%
Employment	Working FT / PT / Casual	561	68%
	Retired	219	64%
	Other	226	62%
Solar	Solar PVs	252	73%
	No Solar PVs	739	64%
	Solar hot water	92	80%
	Neither	680	62%
Switched Energy Company or Plan	In the past 12 months	278	63%
	1 to 5 years ago	216	66%
	NETT switched (Last 5 yrs)	494	64%
	Have not switched at all	497	67%
Approached by Energy Company (Last 12 Months)	Yes	423	65%
	No	480	67%
Actively Investigated Options	Yes	297	61%
	No	669	68%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	382	68%
	Medium (\$300 to \$499)	300	63%
	High (\$500+)	209	68%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	65%
	Medium (\$200 to \$300)	235	69%
	High (\$300+)	308	68%
Customer Segments	Vulnerable Low Income	116	60%
	Vulnerable Mid Income	67	53%
	Vulnerable High Income	55	96%
	Low Income Retired	108	67%
	Average	185	64%
	Secure Retired	106	60%
	Secure High Income	354	67%
Willingness To Take Risks	Low (0-4)	182	63%
	Medium (5-7)	391	63%
	High (8-10)	223	80%
Technology Adopter	Innovator	86	86%
	Early Adopter	178	68%
	Early Majority	324	65%
	Late Majority	136	60%
	Laggard	75	72%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		1983	64%	11%
Location	Metro	1457	65%	10%
	Regional	526	61%	13%
Gas (Dual Fuel)	Yes	991	66%	12%
	No (Electricity only)	929	63%	11%
Age Group	18 - 34	494	70%	7%
	35 - 54	799	59%	12%
	55+	690	63%	13%
Home Ownership	Owners	1374	66%	11%
	Renters / Other	609	59%	10%
Household Income (Annual)	Low (<\$50k)	627	65%	12%
	Medium (\$50k -<\$100k)	628	65%	10%
	High (>\$100k)	480	66%	11%
Employment	Working FT / PT / Casual	1052	66%	10%
	Retired	482	63%	12%
	Other	477	59%	12%
Solar	Solar PVs	507	67%	10%
	No Solar PVs	1476	63%	11%
	Solar hot water	236	69%	7%
	Neither	1339	63%	12%
Switched Energy Company or Plan	In the past 12 months	473	69%	13%
	1 to 5 years ago	468	62%	14%
	NETT switched (Last 5 yrs)	941	66%	13%
	Have not switched at all	1042	62%	9%
Approached by Energy Company (Last 12 Months)	Yes	693	66%	13%
	No	1101	64%	11%
Actively Investigated Options	Yes	557	67%	16%
	No	1373	63%	9%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	70%	9%
	Medium (\$300 to \$499)	566	64%	11%
	High (\$500+)	481	60%	15%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	67%	11%
	Medium (\$200 to \$300)	235	71%	11%
	High (\$300+)	308	67%	14%
Customer Segments	Vulnerable Low Income	252	63%	12%
	Vulnerable Mid Income	145	49%	16%
	Vulnerable High Income	74	86%	4%
	Low Income Retired	252	62%	12%
	Average	396	62%	10%
	Secure Retired	216	66%	12%
	Secure High Income	648	66%	10%
Willingness To Take Risks	Low (0-4)	392	54%	14%
	Medium (5-7)	782	63%	10%
	High (8-10)	359	78%	7%
Technology Adopter	Innovator	130	81%	2%
	Early Adopter	294	69%	13%
	Early Majority	660	62%	10%
	Late Majority	295	60%	12%
	Laggard	170	53%	10%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		916	80%	5%
Location	Metro	645	80%	5%
	Regional	271	80%	5%
Gas (Dual Fuel)	Yes	469	80%	6%
	No (Electricity only)	430	80%	4%
Age Group	18 - 34	198	74%	6%
	35 - 54	387	80%	5%
	55+	331	83%	4%
Home Ownership	Owners	651	81%	5%
	Renters / Other	265	76%	6%
Household Income (Annual)	Low (<\$50k)	305	80%	5%
	Medium (\$50k -<\$100k)	284	82%	6%
	High (>\$100k)	218	77%	3%
Employment	Working FT / PT / Casual	481	76%	6%
	Retired	222	86%	3%
	Other	228	81%	4%
Solar	Solar PVs	247	81%	5%
	No Solar PVs	669	80%	5%
	Solar hot water	124	81%	2%
	Neither	609	80%	5%
Switched Energy Company or Plan	In the past 12 months	459	79%	6%
	1 to 5 years ago	457	81%	4%
	NETT switched (Last 5 yrs)	916	80%	5%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	422	79%	5%
	No	418	82%	4%
Actively Investigated Options	Yes	379	80%	6%
	No	523	80%	4%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	352	84%	4%
	Medium (\$300 to \$499)	297	81%	3%
	High (\$500+)	198	75%	8%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	156	82%	3%
	Medium (\$200 to \$300)	121	83%	5%
	High (\$300+)	151	78%	8%
Customer Segments	Vulnerable Low Income	135	76%	5%
	Vulnerable Mid Income	73	68%	13%
	Vulnerable High Income	35	68%	6%
	Low Income Retired	120	82%	3%
	Average	180	84%	5%
	Secure Retired	99	91%	3%
	Secure High Income	274	78%	4%
Willingness To Take Risks	Low (0-4)	155	78%	5%
	Medium (5-7)	358	78%	5%
	High (8-10)	175	79%	5%
Technology Adopter	Innovator	53	75%	10%
	Early Adopter	158	74%	6%
	Early Majority	306	83%	4%
	Late Majority	120	74%	3%
	Laggard	55	74%	3%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		916	78%	8%
Location	Metro	645	76%	9%
	Regional	271	82%	8%
Gas (Dual Fuel)	Yes	469	77%	10%
	No (Electricity only)	430	80%	7%
Age Group	18 - 34	198	74%	9%
	35 - 54	387	75%	10%
	55+	331	84%	6%
Home Ownership	Owners	651	81%	8%
	Renters / Other	265	72%	9%
Household Income (Annual)	Low (<\$50k)	305	80%	7%
	Medium (\$50k -<\$100k)	284	78%	9%
	High (>\$100k)	218	78%	7%
Employment	Working FT / PT / Casual	481	74%	10%
	Retired	222	87%	5%
	Other	228	76%	10%
Solar	Solar PVs	247	81%	9%
	No Solar PVs	669	77%	8%
	Solar hot water	124	79%	5%
	Neither	609	77%	9%
Switched Energy Company or Plan	In the past 12 months	459	77%	9%
	1 to 5 years ago	457	79%	7%
	NETT switched (Last 5 yrs)	916	78%	8%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	422	79%	10%
	No	418	78%	6%
Actively Investigated Options	Yes	379	78%	10%
	No	523	78%	7%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	352	84%	6%
	Medium (\$300 to \$499)	297	77%	9%
	High (\$500+)	198	75%	11%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	156	82%	6%
	Medium (\$200 to \$300)	121	77%	15%
	High (\$300+)	151	74%	10%
Customer Segments	Vulnerable Low Income	135	77%	11%
	Vulnerable Mid Income	73	62%	16%
	Vulnerable High Income	35	75%	8%
	Low Income Retired	120	86%	5%
	Average	180	77%	9%
	Secure Retired	99	89%	4%
	Secure High Income	274	75%	8%
Willingness To Take Risks	Low (0-4)	155	79%	7%
	Medium (5-7)	358	76%	8%
	High (8-10)	175	71%	13%
Technology Adopter	Innovator	53	71%	15%
	Early Adopter	158	72%	10%
	Early Majority	306	80%	7%
	Late Majority	120	71%	8%
	Laggard	55	77%	10%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		351	80%	6%
Location	Metro	307	82%	5%
	Regional	44	74%	13%
Gas (Dual Fuel)	Yes	351	80%	6%
	No (Electricity only)	0	-	-
Age Group	18 - 34	82	82%	3%
	35 - 54	156	82%	8%
	55+	113	78%	7%
Home Ownership	Owners	261	83%	6%
	Renters / Other	90	74%	9%
Household Income (Annual)	Low (<\$50k)	93	73%	11%
	Medium (\$50k -<\$100k)	129	84%	4%
	High (>\$100k)	86	84%	7%
Employment	Working FT / PT / Casual	211	81%	4%
	Retired	68	81%	9%
	Other	77	79%	9%
Solar	Solar PVs	86	80%	6%
	No Solar PVs	265	81%	6%
	Solar hot water	31	78%	0%
	Neither	244	81%	7%
Switched Energy Company or Plan	In the past 12 months	210	80%	8%
	1 to 5 years ago	141	81%	5%
	NETT switched (Last 5 yrs)	351	80%	6%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	173	80%	7%
	No	151	81%	5%
Actively Investigated Options	Yes	152	77%	9%
	No	192	82%	5%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	131	83%	8%
	Medium (\$300 to \$499)	120	82%	5%
	High (\$500+)	73	78%	5%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	115	81%	8%
	Medium (\$200 to \$300)	94	86%	6%
	High (\$300+)	118	80%	4%
Customer Segments	Vulnerable Low Income	46	85%	6%
	Vulnerable Mid Income	23	62%*	11%*
	Vulnerable High Income	20	84%*	8%*
	Low Income Retired	36	71%	13%
	Average	66	81%	7%
	Secure Retired	32	92%	4%
	Secure High Income	128	80%	4%
Willingness To Take Risks	Low (0-4)	54	74%	12%
	Medium (5-7)	143	81%	4%
	High (8-10)	86	79%	6%
Technology Adopter	Innovator	27	90%*	5%*
	Early Adopter	74	76%	5%
	Early Majority	120	80%	6%
	Late Majority	48	75%	10%
	Laggard	15	78%*	8%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		351	79%	6%
Location	Metro	307	79%	6%
	Regional	44	79%	7%
Gas (Dual Fuel)	Yes	351	79%	6%
	No (Electricity only)	0	-	-
Age Group	18 - 34	82	81%	5%
	35 - 54	156	85%	7%
	55+	113	71%	7%
Home Ownership	Owners	261	79%	7%
	Renters / Other	90	79%	5%
Household Income (Annual)	Low (<\$50k)	93	72%	8%
	Medium (\$50k -<\$100k)	129	81%	7%
	High (>\$100k)	86	87%	7%
Employment	Working FT / PT / Casual	211	80%	5%
	Retired	68	72%	7%
	Other	77	83%	8%
Solar	Solar PVs	86	75%	5%
	No Solar PVs	265	80%	7%
	Solar hot water	31	84%	0%
	Neither	244	79%	7%
Switched Energy Company or Plan	In the past 12 months	210	78%	7%
	1 to 5 years ago	141	79%	6%
	NETT switched (Last 5 yrs)	351	79%	6%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	173	80%	8%
	No	151	79%	5%
Actively Investigated Options	Yes	152	75%	10%
	No	192	81%	4%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	131	82%	6%
	Medium (\$300 to \$499)	120	81%	6%
	High (\$500+)	73	72%	8%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	115	77%	6%
	Medium (\$200 to \$300)	94	84%	7%
	High (\$300+)	118	78%	6%
Customer Segments	Vulnerable Low Income	46	85%	5%
	Vulnerable Mid Income	23	62%*	10%*
	Vulnerable High Income	20	92%*	8%*
	Low Income Retired	36	68%	10%
	Average	66	85%	5%
	Secure Retired	32	78%	5%
	Secure High Income	128	78%	6%
Willingness To Take Risks	Low (0-4)	54	76%	9%
	Medium (5-7)	143	79%	6%
	High (8-10)	86	71%	7%
Technology Adopter	Innovator	27	88%*	9%*
	Early Adopter	74	72%	5%
	Early Majority	120	77%	7%
	Late Majority	48	70%	8%
	Laggard	15	89%*	6%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		1983	63%
Location	Metro	1457	64%
	Regional	526	62%
Gas (Dual Fuel)	Yes	991	64%
	No (Electricity only)	929	64%
Age Group	18 - 34	494	68%
	35 - 54	799	60%
	55+	690	62%
Home Ownership	Owners	1374	64%
	Renters / Other	609	63%
Household Income (Annual)	Low (<\$50k)	627	64%
	Medium (\$50k -<\$100k)	628	65%
	High (>\$100k)	480	67%
Employment	Working FT / PT / Casual	1052	66%
	Retired	482	62%
	Other	477	59%
Solar	Solar PVs	507	70%
	No Solar PVs	1476	61%
	Solar hot water	236	67%
	Neither	1339	62%
Switched Energy Company or Plan	In the past 12 months	473	70%
	1 to 5 years ago	468	66%
	NETT switched (Last 5 yrs)	941	68%
	Have not switched at all	1042	59%
Approached by Energy Company (Last 12 Months)	Yes	693	64%
	No	1101	64%
Actively Investigated Options	Yes	557	73%
	No	1373	60%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	69%
	Medium (\$300 to \$499)	566	62%
	High (\$500+)	481	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	64%
	Medium (\$200 to \$300)	235	66%
	High (\$300+)	308	68%
Customer Segments	Vulnerable Low Income	252	61%
	Vulnerable Mid Income	145	52%
	Vulnerable High Income	74	82%
	Low Income Retired	252	63%
	Average	396	60%
	Secure Retired	216	62%
	Secure High Income	648	67%
Willingness To Take Risks	Low (0-4)	392	55%
	Medium (5-7)	782	62%
	High (8-10)	359	81%
Technology Adopter	Innovator	130	81%
	Early Adopter	294	68%
	Early Majority	660	64%
	Late Majority	295	60%
	Laggard	170	52%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		1983	63%
Location	Metro	1457	64%
	Regional	526	62%
Gas (Dual Fuel)	Yes	991	66%
	No (Electricity only)	929	62%
Age Group	18 - 34	494	66%
	35 - 54	799	58%
	55+	690	67%
Home Ownership	Owners	1374	65%
	Renters / Other	609	60%
Household Income (Annual)	Low (<\$50k)	627	63%
	Medium (\$50k -<\$100k)	628	67%
	High (>\$100k)	480	66%
Employment	Working FT / PT / Casual	1052	64%
	Retired	482	68%
	Other	477	57%
Solar	Solar PVs	507	71%
	No Solar PVs	1476	61%
	Solar hot water	236	70%
	Neither	1339	61%
Switched Energy Company or Plan	In the past 12 months	473	68%
	1 to 5 years ago	468	63%
	NETT switched (Last 5 yrs)	941	66%
	Have not switched at all	1042	61%
Approached by Energy Company (Last 12 Months)	Yes	693	64%
	No	1101	65%
Actively Investigated Options	Yes	557	70%
	No	1373	61%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	69%
	Medium (\$300 to \$499)	566	65%
	High (\$500+)	481	60%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	66%
	Medium (\$200 to \$300)	235	71%
	High (\$300+)	308	66%
Customer Segments	Vulnerable Low Income	252	58%
	Vulnerable Mid Income	145	43%
	Vulnerable High Income	74	81%
	Low Income Retired	252	68%
	Average	396	59%
	Secure Retired	216	68%
	Secure High Income	648	67%
Willingness To Take Risks	Low (0-4)	392	55%
	Medium (5-7)	782	62%
	High (8-10)	359	81%
Technology Adopter	Innovator	130	79%
	Early Adopter	294	71%
	Early Majority	660	63%
	Late Majority	295	58%
	Laggard	170	53%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		1983	78%	65%	49%	49%	45%	40%	38%
Location	Metro	1457	77%	64%	50%	50%	46%	41%	40%
	Regional	526	81%	65%	48%	46%	43%	37%	33%
Gas (Dual Fuel)	Yes	991	78%	65%	51%	51%	47%	42%	41%
	No (Electricity only)	929	81%	65%	48%	47%	45%	38%	36%
Age Group	18 - 34	494	73%	65%	48%	51%	55%	44%	50%
	35 - 54	799	76%	65%	49%	49%	46%	39%	41%
	55+	690	84%	63%	51%	47%	37%	37%	26%
Home Ownership	Owners	1374	81%	66%	50%	49%	45%	41%	38%
	Renters / Other	609	74%	60%	46%	48%	45%	36%	38%
Household Income (Annual)	Low (<\$50k)	627	79%	66%	51%	49%	42%	38%	30%
	Medium (\$50k -<\$100k)	628	80%	65%	52%	50%	45%	41%	43%
	High (>\$100k)	480	81%	66%	43%	51%	51%	43%	46%
Employment	Working FT / PT / Casual	1052	78%	65%	49%	51%	51%	43%	48%
	Retired	482	83%	62%	52%	47%	36%	37%	22%
	Other	477	76%	65%	47%	48%	46%	35%	36%
Solar	Solar PVs	507	81%	65%	53%	46%	45%	41%	34%
	No Solar PVs	1476	78%	64%	48%	50%	46%	39%	40%
	Solar hot water	236	80%	65%	50%	46%	45%	38%	31%
	Neither	1339	79%	65%	48%	50%	46%	40%	40%
Switched Energy Company or Plan	In the past 12 months	473	85%	61%	43%	43%	35%	29%	29%
	1 to 5 years ago	468	86%	67%	50%	44%	43%	33%	32%
	NETT switched (Last 5 yrs)	941	85%	64%	47%	43%	39%	31%	30%
	Have not switched at all	1042	72%	65%	52%	54%	52%	48%	46%
Approached by Energy Company (Last 12 Months)	Yes	693	85%	69%	54%	53%	48%	41%	40%
	No	1101	76%	62%	48%	47%	45%	39%	38%
Actively Investigated Options	Yes	557	87%	61%	46%	42%	36%	28%	27%
	No	1373	77%	67%	51%	53%	50%	45%	44%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	80%	63%	48%	47%	43%	42%	34%
	Medium (\$300 to \$499)	566	82%	67%	49%	50%	46%	35%	39%
	High (\$500+)	481	80%	70%	55%	56%	50%	44%	46%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	78%	62%	52%	50%	42%	40%	39%
	Medium (\$200 to \$300)	235	80%	70%	50%	57%	47%	45%	45%
	High (\$300+)	308	82%	70%	55%	53%	53%	45%	40%
Customer Segments	Vulnerable Low Income	252	79%	70%	57%	51%	44%	36%	36%
	Vulnerable Mid Income	145	80%	72%	49%	49%	52%	39%	46%
	Vulnerable High Income	74	85%	91%	71%	67%	74%	65%	57%
	Low Income Retired	252	81%	60%	52%	49%	39%	36%	23%
	Average	396	73%	60%	40%	45%	42%	34%	40%
	Secure Retired	216	85%	63%	51%	45%	33%	38%	19%
Willingness To Take Risks	Secure High Income	648	77%	62%	48%	49%	51%	44%	48%
	Low (0-4)	392	72%	63%	50%	53%	42%	38%	39%
	Medium (5-7)	782	77%	61%	43%	43%	37%	34%	32%
	High (8-10)	359	80%	67%	49%	42%	45%	41%	34%
Technology Adopter	Innovator	130	76%	71%	62%	53%	59%	52%	38%
	Early Adopter	294	80%	61%	45%	42%	40%	37%	32%
	Early Majority	660	78%	62%	42%	44%	35%	31%	32%
	Late Majority	295	74%	62%	48%	47%	38%	39%	35%
	Laggard	170	62%	57%	47%	43%	46%	37%	39%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		1983	3%	13%	17%	26%	23%	31%	32%
Location	Metro	1457	3%	13%	16%	24%	22%	29%	30%
	Regional	526	3%	15%	18%	31%	25%	37%	38%
Gas (Dual Fuel)	Yes	991	3%	13%	17%	24%	24%	30%	31%
	No (Electricity only)	929	3%	14%	17%	29%	23%	33%	35%
Age Group	18 - 34	494	3%	10%	12%	19%	15%	25%	19%
	35 - 54	799	4%	13%	19%	24%	23%	33%	28%
	55+	690	3%	17%	18%	32%	29%	35%	45%
Home Ownership	Owners	1374	3%	14%	17%	28%	24%	31%	34%
	Renters / Other	609	3%	13%	15%	22%	21%	31%	27%
Household Income (Annual)	Low (<\$50k)	627	3%	14%	17%	27%	24%	33%	38%
	Medium (\$50k -<\$100k)	628	3%	13%	15%	27%	24%	31%	31%
	High (>\$100k)	480	3%	13%	21%	26%	20%	31%	30%
Employment	Working FT / PT / Casual	1052	3%	12%	17%	23%	19%	28%	24%
	Retired	482	3%	18%	19%	32%	29%	35%	49%
	Other	477	3%	12%	15%	25%	24%	33%	30%
Solar	Solar PVs	507	3%	14%	16%	30%	27%	32%	38%
	No Solar PVs	1476	3%	13%	17%	25%	22%	31%	30%
	Solar hot water	236	3%	11%	12%	32%	23%	29%	36%
	Neither	1339	3%	14%	18%	25%	22%	32%	31%
Switched Energy Company or Plan	In the past 12 months	473	4%	19%	24%	37%	34%	47%	48%
	1 to 5 years ago	468	3%	15%	21%	31%	28%	41%	41%
	NETT switched (Last 5 yrs)	941	3%	17%	23%	34%	31%	44%	44%
	Have not switched at all	1042	3%	9%	11%	18%	15%	18%	20%
Approached by Energy Company (Last 12 Months)	Yes	693	4%	15%	20%	27%	26%	38%	36%
	No	1101	3%	13%	16%	26%	22%	28%	31%
Actively Investigated Options	Yes	557	3%	22%	24%	41%	35%	50%	51%
	No	1373	3%	10%	14%	20%	18%	24%	24%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	733	3%	17%	18%	29%	26%	32%	36%
	Medium (\$300 to \$499)	566	2%	13%	20%	27%	23%	35%	33%
	High (\$500+)	481	4%	11%	13%	23%	21%	29%	30%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	340	3%	17%	18%	25%	28%	32%	31%
	Medium (\$200 to \$300)	235	3%	12%	18%	24%	24%	31%	30%
	High (\$300+)	308	4%	12%	15%	23%	23%	30%	34%
Customer Segments	Vulnerable Low Income	252	5%	13%	15%	25%	26%	37%	33%
	Vulnerable Mid Income	145	3%	11%	13%	24%	21%	33%	22%
	Vulnerable High Income	74	8%	4%	18%	18%	11%	18%	20%
	Low Income Retired	252	4%	17%	17%	29%	23%	34%	42%
	Average	396	1%	14%	16%	25%	24%	30%	29%
	Secure Retired	216	2%	19%	21%	36%	35%	37%	58%
Willingness To Take Risks	Secure High Income	648	3%	11%	17%	23%	18%	28%	24%
	Low (0-4)	392	2%	14%	16%	21%	24%	31%	30%
	Medium (5-7)	782	3%	13%	13%	26%	24%	30%	32%
Technology Adopter	High (8-10)	359	2%	11%	17%	28%	24%	31%	34%
	Innovator	130	5%	12%	19%	26%	19%	29%	34%
	Early Adopter	294	2%	16%	17%	29%	26%	33%	38%
	Early Majority	660	2%	11%	15%	25%	27%	32%	32%
	Late Majority	295	2%	12%	12%	23%	25%	29%	31%
	Laggard	170	6%	13%	10%	19%	11%	18%	21%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Appendix Four: Queensland Tables

NB: Tables with total base size of n=<30 are not displayed.

Appendix Four, Part A: South East Queensland

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		425	92%
Location	Metro	283	94%
	Regional	142	87%
Gas (Dual Fuel)	Yes	79	93%
	No (Electricity only)	343	92%
Age Group	18 - 34	80	90%
	35 - 54	167	92%
	55+	178	92%
Home Ownership	Owners	291	92%
	Renters / Other	134	90%
Household Income (Annual)	Low (<\$50k)	150	96%
	Medium (\$50k -<\$100k)	135	90%
	High (>\$100k)	92	94%
Employment	Working FT / PT / Casual	201	91%
	Retired	128	95%
	Other	101	88%
Solar	Solar PVs	135	96%
	No Solar PVs	290	90%
	Solar hot water	61	88%
	Neither	267	91%
Switched Energy Company or Plan	In the past 12 months	77	95%
	1 to 5 years ago	103	93%
	NETT switched (Last 5 yrs)	180	94%
	Have not switched at all	245	90%
Approached by Energy Company (Last 12 Months)	Yes	101	98%
	No	287	90%
Actively Investigated Options	Yes	111	94%
	No	306	92%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	92%
	Medium (\$300 to \$499)	120	96%
	High (\$500+)	102	89%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	89%
	Medium (\$200 to \$300)	12	91%*
	High (\$300+)	19	100%*
Customer Segments	Vulnerable Low Income	51	89%
	Vulnerable Mid Income	34	90%
	Vulnerable High Income	12	92%*
	Low Income Retired	74	92%
	Average	86	82%
	Secure Retired	50	98%
	Secure High Income	118	96%
Willingness To Take Risks	Low (0-4)	97	91%
	Medium (5-7)	168	92%
	High (8-10)	66	89%
Technology Adopter	Innovator	18	100%*
	Early Adopter	61	89%
	Early Majority	139	93%
	Late Majority	70	88%
	Laggard	44	89%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q13. Please tell me whether you think the following statements are True or False. b) Consumers in your state [territory] can choose their gas company.			
		(n=)	True
Total		79	89%
Location	Metro	59	89%
	Regional	20	89%*
Gas (Dual Fuel)	Yes	79	89%
	No (Electricity only)	0	-
Age Group	18 - 34	25	92%*
	35 - 54	26	95%*
	55+	28	83%*
Home Ownership	Owners	52	86%
	Renters / Other	27	97%*
Household Income (Annual)	Low (<\$50k)	27	89%*
	Medium (\$50k -<\$100k)	27	91%*
	High (>\$100k)	17	87%*
Employment	Working FT / PT / Casual	41	92%
	Retired	19	81%*
	Other	21	94%*
Solar	Solar PVs	21	95%*
	No Solar PVs	58	87%
	Solar hot water	8	100%**
	Neither	54	87%
Switched Energy Company or Plan	In the past 12 months	19	94%*
	1 to 5 years ago	14	94%*
	NETT switched (Last 5 yrs)	33	94%
	Have not switched at all	46	86%
Approached by Energy Company (Last 12 Months)	Yes	26	96%*
	No	50	86%
Actively Investigated Options	Yes	21	95%*
	No	58	87%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	33	85%
	Medium (\$300 to \$499)	22	95%*
	High (\$500+)	18	94%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	87%
	Medium (\$200 to \$300)	12	100%*
	High (\$300+)	19	89%*
Customer Segments	Vulnerable Low Income	11	100%*
	Vulnerable Mid Income	6	100%**
	Vulnerable High Income	6	82%**
	Low Income Retired	12	78%*
	Average	14	83%*
	Secure Retired	6	85%**
	Secure High Income	24	95%*
Willingness To Take Risks	Low (0-4)	16	100%*
	Medium (5-7)	32	91%
	High (8-10)	16	87%*
Technology Adopter	Innovator	5	78%**
	Early Adopter	16	93%*
	Early Majority	26	91%*
	Late Majority	11	92%*
	Laggard	6	100%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		425	77%
Location	Metro	283	76%
	Regional	142	79%
Gas (Dual Fuel)	Yes	79	83%
	No (Electricity only)	343	76%
Age Group	18 - 34	80	80%
	35 - 54	167	74%
	55+	178	79%
Home Ownership	Owners	291	80%
	Renters / Other	134	71%
Household Income (Annual)	Low (<\$50k)	150	77%
	Medium (\$50k -<\$100k)	135	81%
	High (>\$100k)	92	79%
Employment	Working FT / PT / Casual	201	81%
	Retired	128	77%
	Other	101	70%
Solar	Solar PVs	135	86%
	No Solar PVs	290	73%
	Solar hot water	61	80%
	Neither	267	74%
Switched Energy Company or Plan	In the past 12 months	77	85%
	1 to 5 years ago	103	74%
	NETT switched (Last 5 yrs)	180	78%
	Have not switched at all	245	77%
Approached by Energy Company (Last 12 Months)	Yes	101	84%
	No	287	76%
Actively Investigated Options	Yes	111	87%
	No	306	74%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	80%
	Medium (\$300 to \$499)	120	80%
	High (\$500+)	102	75%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	76%
	Medium (\$200 to \$300)	12	100%*
	High (\$300+)	19	94%*
Customer Segments	Vulnerable Low Income	51	74%
	Vulnerable Mid Income	34	68%
	Vulnerable High Income	12	100%*
	Low Income Retired	74	76%
	Average	86	67%
	Secure Retired	50	80%
	Secure High Income	118	86%
Willingness To Take Risks	Low (0-4)	97	75%
	Medium (5-7)	168	76%
	High (8-10)	66	82%
Technology Adopter	Innovator	18	81%*
	Early Adopter	61	85%
	Early Majority	139	79%
	Late Majority	70	70%
	Laggard	44	69%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.

		(n=)	True
Total		79	68%
Location	Metro	59	65%
	Regional	20	78%*
Gas (Dual Fuel)	Yes	79	68%
	No (Electricity only)	0	-
Age Group	18 - 34	25	80%*
	35 - 54	26	66%*
	55+	28	59%*
Home Ownership	Owners	52	67%
	Renters / Other	27	70%*
Household Income (Annual)	Low (<\$50k)	27	61%*
	Medium (\$50k -<\$100k)	27	77%*
	High (>\$100k)	17	75%*
Employment	Working FT / PT / Casual	41	74%
	Retired	19	55%*
	Other	21	69%*
Solar	Solar PVs	21	80%*
	No Solar PVs	58	64%
	Solar hot water	8	66%**
	Neither	54	63%
Switched Energy Company or Plan	In the past 12 months	19	82%*
	1 to 5 years ago	14	44%*
	NETT switched (Last 5 yrs)	33	65%
	Have not switched at all	46	70%
Approached by Energy Company (Last 12 Months)	Yes	26	73%*
	No	50	67%
Actively Investigated Options	Yes	21	74%*
	No	58	66%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	33	67%
	Medium (\$300 to \$499)	22	62%*
	High (\$500+)	18	83%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	59%
	Medium (\$200 to \$300)	12	85%*
	High (\$300+)	19	85%*
Customer Segments	Vulnerable Low Income	11	84%*
	Vulnerable Mid Income	6	72%**
	Vulnerable High Income	6	82%**
	Low Income Retired	12	59%*
	Average	14	44%*
	Secure Retired	6	50%**
	Secure High Income	24	80%*
Willingness To Take Risks	Low (0-4)	16	65%*
	Medium (5-7)	32	73%
	High (8-10)	16	84%*
Technology Adopter	Innovator	5	100%**
	Early Adopter	16	72%*
	Early Majority	26	64%*
	Late Majority	11	92%*
	Laggard	6	72%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?			
		(n=)	Yes
Total		425	26%
Location	Metro	283	23%
	Regional	142	33%
Gas (Dual Fuel)	Yes	79	26%
	No (Electricity only)	343	27%
Age Group	18 - 34	80	22%
	35 - 54	167	25%
	55+	178	29%
Home Ownership	Owners	291	29%
	Renters / Other	134	21%
Household Income (Annual)	Low (<\$50k)	150	28%
	Medium (\$50k -<\$100k)	135	30%
	High (>\$100k)	92	26%
Employment	Working FT / PT / Casual	201	30%
	Retired	128	22%
	Other	101	28%
Solar	Solar PVs	135	30%
	No Solar PVs	290	25%
	Solar hot water	61	36%
	Neither	267	24%
Switched Energy Company or Plan	In the past 12 months	77	59%
	1 to 5 years ago	103	31%
	NETT switched (Last 5 yrs)	180	43%
	Have not switched at all	245	14%
Approached by Energy Company (Last 12 Months)	Yes	101	44%
	No	287	21%
Actively Investigated Options	Yes	111	100%
	No	306	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	24%
	Medium (\$300 to \$499)	120	26%
	High (\$500+)	102	36%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	27%
	Medium (\$200 to \$300)	12	25%*
	High (\$300+)	19	31%*
Customer Segments	Vulnerable Low Income	51	39%
	Vulnerable Mid Income	34	24%
	Vulnerable High Income	12	68%*
	Low Income Retired	74	19%
	Average	86	23%
	Secure Retired	50	27%
	Secure High Income	118	25%
Willingness To Take Risks	Low (0-4)	97	26%
	Medium (5-7)	168	22%
	High (8-10)	66	40%
Technology Adopter	Innovator	18	55%*
	Early Adopter	61	41%
	Early Majority	139	24%
	Late Majority	70	19%
	Laggard	44	21%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q51. The last time you switched your electricity company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		178	68%	13%
Location	Metro	115	71%	12%
	Regional	63	62%	15%
Gas (Dual Fuel)	Yes	31	72%	12%
	No (Electricity only)	146	67%	14%
Age Group	18 - 34	35	78%	14%
	35 - 54	66	68%	17%
	55+	77	64%	11%
Home Ownership	Owners	124	69%	14%
	Renters / Other	54	66%	12%
Household Income (Annual)	Low (<\$50k)	63	58%	15%
	Medium (\$50k -<\$100k)	55	73%	11%
	High (>\$100k)	44	76%	14%
Employment	Working FT / PT / Casual	87	72%	16%
	Retired	51	61%	11%
	Other	42	68%	13%
Solar	Solar PVs	58	71%	10%
	No Solar PVs	120	67%	15%
	Solar hot water	29	61%*	23%*
	Neither	110	69%	12%
Switched Energy Company or Plan	In the past 12 months	77	70%	14%
	1 to 5 years ago	101	67%	12%
	NETT switched (Last 5 yrs)	178	68%	13%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	62	69%	22%
	No	97	71%	9%
Actively Investigated Options	Yes	76	67%	19%
	No	102	69%	9%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	67%	8%
	Medium (\$300 to \$499)	54	72%	17%
	High (\$500+)	41	67%	17%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	15	72%*	13%*
	Medium (\$200 to \$300)	6	36%**	13%**
	High (\$300+)	9	100%**	0%**
Customer Segments	Vulnerable Low Income	26	64%*	11%*
	Vulnerable Mid Income	14	60%*	26%*
	Vulnerable High Income	6	84%**	16%**
	Low Income Retired	32	63%	4%
	Average	29	76%*	10%*
	Secure Retired	19	59%*	22%*
	Secure High Income	52	74%	15%
Willingness To Take Risks	Low (0-4)	32	61%	19%
	Medium (5-7)	73	66%	12%
	High (8-10)	30	73%	8%
Technology Adopter	Innovator	10	48%*	38%*
	Early Adopter	32	70%	14%
	Early Majority	58	68%	13%
	Late Majority	24	66%*	5%*
	Laggard	11	65%*	10%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q17a. In the past 5 years, how many times have you changed the following? Q17b. And was that in the last 12 months?					
		(n=)	% Changed in past 12 months	% Changed in past 5 years	% Not Switched in Last 5 Years
Total		425	18%	43%	57%
Location	Metro	283	18%	41%	59%
	Regional	142	19%	46%	54%
Gas (Dual Fuel)	Yes	79	23%	42%	58%
	No (Electricity only)	343	17%	43%	57%
Age Group	18 - 34	80	17%	44%	56%
	35 - 54	167	17%	41%	59%
	55+	178	19%	44%	56%
Home Ownership	Owners	291	18%	43%	57%
	Renters / Other	134	20%	42%	58%
Household Income (Annual)	Low (<\$50k)	150	19%	44%	56%
	Medium (\$50k -<\$100k)	135	20%	42%	58%
	High (>\$100k)	92	16%	49%	51%
Employment	Working FT / PT / Casual	201	19%	44%	56%
	Retired	128	19%	41%	59%
	Other	101	15%	42%	58%
Solar	Solar PVs	135	16%	43%	57%
	No Solar PVs	290	19%	43%	57%
	Solar hot water	61	16%	49%	51%
	Neither	267	18%	43%	57%
Switched Energy Company or Plan	In the past 12 months	77	100%	100%	0%
	1 to 5 years ago	103	0%	100%	0%
	NETT switched (Last 5 yrs)	180	42%	100%	0%
	Have not switched at all	245	0%	0%	100%
Approached by Energy Company (Last 12 Months)	Yes	101	30%	62%	38%
	No	287	14%	35%	65%
Actively Investigated Options	Yes	111	40%	70%	30%
	No	306	10%	34%	66%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	17%	44%	56%
	Medium (\$300 to \$499)	120	21%	46%	54%
	High (\$500+)	102	17%	43%	57%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	24%	43%	57%
	Medium (\$200 to \$300)	12	25%*	50%*	50%*
	High (\$300+)	19	25%*	48%*	52%*
Customer Segments	Vulnerable Low Income	51	22%	53%	47%
	Vulnerable Mid Income	34	23%	43%	57%
	Vulnerable High Income	12	42%*	51%*	49%*
	Low Income Retired	74	17%	45%	55%
	Average	86	12%	35%	65%
	Secure Retired	50	22%	39%	61%
	Secure High Income	118	16%	44%	56%
Willingness To Take Risks	Low (0-4)	97	16%	36%	64%
	Medium (5-7)	168	17%	44%	56%
	High (8-10)	66	29%	47%	53%
Technology Adopter	Innovator	18	18%*	53%*	47%*
	Early Adopter	61	27%	52%	48%
	Early Majority	139	19%	44%	56%
	Late Majority	70	16%	38%	62%
	Laggard	44	13%	24%	76%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?			
		(n=)	Yes
Total		425	24%
Location	Metro	283	22%
	Regional	142	28%
Gas (Dual Fuel)	Yes	79	33%
	No (Electricity only)	343	22%
Age Group	18 - 34	80	28%
	35 - 54	167	21%
	55+	178	25%
Home Ownership	Owners	291	26%
	Renters / Other	134	20%
Household Income (Annual)	Low (<\$50k)	150	24%
	Medium (\$50k -<\$100k)	135	21%
	High (>\$100k)	92	30%
Employment	Working FT / PT / Casual	201	26%
	Retired	128	22%
	Other	101	23%
Solar	Solar PVs	135	26%
	No Solar PVs	290	23%
	Solar hot water	61	23%
	Neither	267	23%
Switched Energy Company or Plan	In the past 12 months	77	39%
	1 to 5 years ago	103	32%
	NETT switched (Last 5 yrs)	180	35%
	Have not switched at all	245	16%
Approached by Energy Company (Last 12 Months)	Yes	101	100%
	No	287	0%
Actively Investigated Options	Yes	111	40%
	No	306	18%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	24%
	Medium (\$300 to \$499)	120	20%
	High (\$500+)	102	29%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	30%
	Medium (\$200 to \$300)	12	53%*
	High (\$300+)	19	35%*
Customer Segments	Vulnerable Low Income	51	29%
	Vulnerable Mid Income	34	28%
	Vulnerable High Income	12	68%*
	Low Income Retired	74	19%
	Average	86	15%
	Secure Retired	50	25%
	Secure High Income	118	27%
Willingness To Take Risks	Low (0-4)	97	23%
	Medium (5-7)	168	20%
	High (8-10)	66	34%
Technology Adopter	Innovator	18	44%*
	Early Adopter	61	30%
	Early Majority	139	22%
	Late Majority	70	13%
	Laggard	44	26%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal.

		(n=)	Importance Rating (NETT 8+)						
			The price per kilowatt hour (kWh)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Availability of green energy plans	The solar feed-in tariff on offer
Total		178	79%	71%	48%	59%	83%	30%	41%
Location	Metro	115	78%	67%	48%	59%	81%	30%	44%
	Regional	63	79%	77%	49%	61%	87%	30%	35%
Gas (Dual Fuel)	Yes	31	88%	75%	58%	62%	88%	50%	62%
	No (Electricity only)	146	76%	70%	46%	58%	82%	25%	37%
Age Group	18 - 34	35	66%	65%	51%	63%	66%	40%	49%
	35 - 54	66	83%	76%	50%	61%	84%	31%	48%
	55+	77	81%	69%	46%	57%	90%	26%	34%
Home Ownership	Owners	124	79%	75%	49%	60%	83%	29%	50%
	Renters / Other	54	76%	60%	47%	58%	83%	34%	22%
Household Income (Annual)	Low (<\$50k)	63	80%	75%	50%	56%	90%	27%	38%
	Medium (\$50k -<\$100k)	55	74%	63%	39%	58%	81%	28%	41%
	High (>\$100k)	44	77%	74%	54%	66%	75%	38%	43%
Employment	Working FT / PT / Casual	87	75%	73%	46%	62%	75%	36%	50%
	Retired	51	80%	72%	48%	55%	90%	18%	34%
	Other	42	82%	66%	52%	61%	90%	37%	37%
Solar	Solar PVs	58	80%	76%	40%	55%	84%	31%	79%
	No Solar PVs	120	78%	68%	52%	62%	83%	30%	23%
	Solar hot water	29	77%*	60%*	48%*	57%*	77%*	33%*	59%*
	Neither	110	80%	71%	54%	65%	87%	31%	23%
Switched Energy Company or Plan	In the past 12 months	77	78%	75%	51%	62%	82%	30%	39%
	1 to 5 years ago	101	79%	67%	47%	57%	84%	31%	43%
	NETT switched (Last 5 yrs)	178	79%	71%	48%	59%	83%	30%	41%
	Have not switched at all	0	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	62	88%	75%	55%	63%	84%	36%	46%
	No	97	75%	71%	43%	54%	84%	30%	38%
Actively Investigated Options	Yes	76	86%	76%	52%	58%	84%	32%	46%
	No	102	73%	66%	45%	60%	83%	29%	38%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	78%	69%	43%	57%	84%	33%	47%
	Medium (\$300 to \$499)	54	81%	73%	51%	63%	83%	29%	36%
	High (\$500+)	41	83%	74%	61%	64%	91%	32%	38%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	15	82%*	75%*	41%*	60%*	87%*	44%*	42%*
	Medium (\$200 to \$300)	6	100%**	63%**	69%**	51%**	100%**	50%**	69%**
	High (\$300+)	9	89%**	80%**	78%**	69%**	80%**	57%**	100%**
Customer Segments	Vulnerable Low Income	26	83%*	78%*	42%*	56%*	89%*	33%*	34%*
	Vulnerable Mid Income	14	85%*	57%*	77%*	85%*	85%*	49%*	38%*
	Vulnerable High Income	6	84%**	82%**	84%**	51%**	67%**	52%**	84%**
	Low Income Retired	32	81%	72%	53%	52%	97%	17%	35%
	Average	29	70%*	64%*	41%*	63%*	79%*	27%*	41%*
	Secure Retired	19	79%*	71%*	40%*	59%*	79%*	21%*	32%*
	Secure High Income	52	76%	72%	43%	58%	75%	37%	49%
Willingness To Take Risks	Low (0-4)	32	70%	49%	48%	57%	88%	24%	28%
	Medium (5-7)	73	77%	75%	48%	59%	82%	32%	38%
	High (8-10)	30	91%	69%	54%	62%	91%	37%	49%
Technology Adopter	Innovator	10	69%*	69%*	38%*	49%*	75%*	41%*	41%*
	Early Adopter	32	83%	81%	60%	65%	80%	40%	55%
	Early Majority	58	81%	65%	48%	60%	90%	32%	36%
	Late Majority	24	75%*	58%*	48%*	62%*	92%*	26%*	33%*
	Laggard	11	65%*	61%*	37%*	37%*	74%*	8%*	10%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal. (Cont'd)

		(n=)	Importance Rating (NETT 8+)					
			Whether the price per kilowatt hour (kWh) can change during the contract	The ability to purchase or access energy storage batteries from the electricity company	The ability to purchase or access solar panels from the electricity company	The electricity company offering access to live data about your energy use and costs	The daily supply / service charge	The brand and reputation of the company
Total		178	71%	19%	22%	36%	73%	62%
Location	Metro	115	71%	23%	24%	40%	70%	61%
	Regional	63	71%	12%	16%	29%	79%	64%
Gas (Dual Fuel)	Yes	31	81%	42%	38%	62%	84%	63%
	No (Electricity only)	146	68%	14%	18%	31%	71%	62%
Age Group	18 - 34	35	66%	46%	37%	57%	80%	63%
	35 - 54	66	78%	23%	23%	42%	75%	55%
	55+	77	68%	5%	15%	25%	69%	66%
Home Ownership	Owners	124	73%	22%	26%	38%	72%	60%
	Renters / Other	54	65%	12%	12%	34%	74%	66%
Household Income (Annual)	Low (<\$50k)	63	73%	16%	16%	28%	71%	67%
	Medium (\$50k -<\$100k)	55	62%	22%	27%	42%	73%	58%
	High (>\$100k)	44	78%	19%	26%	42%	77%	60%
Employment	Working FT / PT / Casual	87	70%	28%	26%	48%	75%	57%
	Retired	51	69%	4%	15%	18%	65%	64%
	Other	42	77%	22%	22%	43%	81%	71%
Solar	Solar PVs	58	70%	22%	26%	36%	67%	61%
	No Solar PVs	120	71%	18%	20%	37%	76%	62%
	Solar hot water	29	81%*	26%*	22%*	40%*	69%*	57%*
	Neither	110	72%	17%	19%	37%	78%	64%
Switched Energy Company or Plan	In the past 12 months	77	68%	20%	26%	39%	73%	66%
	1 to 5 years ago	101	73%	19%	18%	35%	73%	59%
	NETT switched (Last 5 yrs)	178	71%	19%	22%	36%	73%	62%
	Have not switched at all	0	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	62	75%	20%	30%	48%	76%	58%
	No	97	67%	21%	20%	31%	72%	64%
Actively Investigated Options	Yes	76	76%	22%	28%	38%	83%	57%
	No	102	67%	17%	17%	36%	66%	66%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	74%	18%	19%	32%	71%	58%
	Medium (\$300 to \$499)	54	67%	17%	29%	33%	76%	66%
	High (\$500+)	41	77%	28%	19%	53%	76%	72%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	15	75%*	28%*	26%*	47%*	75%*	46%*
	Medium (\$200 to \$300)	6	81%**	45%**	30%**	69%**	81%**	64%**
	High (\$300+)	9	89%**	68%**	68%**	80%**	100%**	89%**
Customer Segments	Vulnerable Low Income	26	71%*	13%*	13%*	39%*	87%*	65%*
	Vulnerable Mid Income	14	93%*	36%*	35%*	58%*	80%*	58%*
	Vulnerable High Income	6	84%**	51%**	52%**	70%**	84%**	51%**
	Low Income Retired	32	76%	4%	13%	18%	64%	71%
	Average	29	69%*	14%*	14%*	40%*	70%*	61%*
	Secure Retired	19	58%*	5%*	18%*	17%*	66%*	52%*
Willingness To Take Risks	Secure High Income	52	66%	35%	32%	46%	74%	62%
	Low (0-4)	32	67%	5%	18%	21%	59%	63%
	Medium (5-7)	73	66%	25%	21%	34%	78%	69%
Technology Adopter	High (8-10)	30	85%	20%	29%	50%	91%	52%
	Innovator	10	59%*	7%*	18%*	49%*	69%*	48%*
	Early Adopter	32	87%	28%	31%	46%	95%	61%
	Early Majority	58	66%	25%	25%	38%	78%	66%
	Late Majority	24	69%*	3%*	13%*	18%*	60%*	70%*
	Laggard	11	64%*	6%*	0%*	8%*	53%*	60%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		425	40%	5%	47%
Location	Metro	283	40%	4%	46%
	Regional	142	40%	6%	50%
Gas (Dual Fuel)	Yes	79	42%	4%	45%
	No (Electricity only)	343	39%	5%	48%
Age Group	18 - 34	80	35%	1%	58%
	35 - 54	167	36%	4%	49%
	55+	178	44%	7%	41%
Home Ownership	Owners	291	39%	4%	49%
	Renters / Other	134	41%	6%	43%
Household Income (Annual)	Low (<\$50k)	150	43%	6%	40%
	Medium (\$50k -<\$100k)	135	32%	5%	59%
	High (>\$100k)	92	35%	5%	55%
Employment	Working FT / PT / Casual	201	39%	4%	50%
	Retired	128	45%	6%	40%
	Other	101	34%	4%	53%
Solar	Solar PVs	135	41%	5%	47%
	No Solar PVs	290	39%	5%	47%
	Solar hot water	61	39%	2%	50%
	Neither	267	39%	5%	47%
Switched Energy Company or Plan	In the past 12 months	77	28%	19%	49%
	1 to 5 years ago	103	27%	2%	65%
	NETT switched (Last 5 yrs)	180	28%	9%	58%
	Have not switched at all	245	48%	1%	39%
Approached by Energy Company (Last 12 Months)	Yes	101	36%	7%	55%
	No	287	40%	4%	45%
Actively Investigated Options	Yes	111	21%	12%	62%
	No	306	47%	2%	42%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	47%	4%	40%
	Medium (\$300 to \$499)	120	33%	4%	53%
	High (\$500+)	102	31%	7%	60%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	38%	5%	43%
	Medium (\$200 to \$300)	12	63%*	9%*	28%*
	High (\$300+)	19	30%*	0%*	64%*
Customer Segments	Vulnerable Low Income	51	37%	4%	52%
	Vulnerable Mid Income	34	31%	12%	49%
	Vulnerable High Income	12	33%*	0%*	67%*
	Low Income Retired	74	48%	5%	35%
	Average	86	38%	4%	47%
	Secure Retired	50	39%	6%	48%
	Secure High Income	118	39%	3%	52%
Willingness To Take Risks	Low (0-4)	97	43%	8%	35%
	Medium (5-7)	168	35%	3%	52%
	High (8-10)	66	27%	5%	59%
Technology Adopter	Innovator	18	11%*	6%*	74%*
	Early Adopter	61	22%	3%	66%
	Early Majority	139	34%	4%	51%
	Late Majority	70	42%	9%	40%
	Laggard	44	61%	4%	21%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		425	70%
Location	Metro	283	73%
	Regional	142	64%
Gas (Dual Fuel)	Yes	79	77%
	No (Electricity only)	343	69%
Age Group	18 - 34	80	75%
	35 - 54	167	66%
	55+	178	71%
Home Ownership	Owners	291	69%
	Renters / Other	134	72%
Household Income (Annual)	Low (<\$50k)	150	71%
	Medium (\$50k -<\$100k)	135	71%
	High (>\$100k)	92	73%
Employment	Working FT / PT / Casual	201	72%
	Retired	128	71%
	Other	101	65%
Solar	Solar PVs	135	74%
	No Solar PVs	290	68%
	Solar hot water	61	73%
	Neither	267	68%
Switched Energy Company or Plan	In the past 12 months	77	76%
	1 to 5 years ago	103	65%
	NETT switched (Last 5 yrs)	180	70%
	Have not switched at all	245	70%
Approached by Energy Company (Last 12 Months)	Yes	101	69%
	No	287	72%
Actively Investigated Options	Yes	111	64%
	No	306	73%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	79%
	Medium (\$300 to \$499)	120	73%
	High (\$500+)	102	57%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	75%
	Medium (\$200 to \$300)	12	78%*
	High (\$300+)	19	94%*
Customer Segments	Vulnerable Low Income	51	62%
	Vulnerable Mid Income	34	63%
	Vulnerable High Income	12	82%*
	Low Income Retired	74	72%
	Average	86	66%
	Secure Retired	50	71%
	Secure High Income	118	75%
Willingness To Take Risks	Low (0-4)	97	69%
	Medium (5-7)	168	65%
	High (8-10)	66	79%
Technology Adopter	Innovator	18	79%*
	Early Adopter	61	72%
	Early Majority	139	64%
	Late Majority	70	77%
	Laggard	44	63%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q7. How satisfied are you with your current gas company?			
		(n=)	Satisfied
Total		79	79%
Location	Metro	59	78%
	Regional	20	81%*
Gas (Dual Fuel)	Yes	79	79%
	No (Electricity only)	0	-
Age Group	18 - 34	25	92%*
	35 - 54	26	70%*
	55+	28	73%*
Home Ownership	Owners	52	76%
	Renters / Other	27	83%*
Household Income (Annual)	Low (<\$50k)	27	71%*
	Medium (\$50k -<\$100k)	27	89%*
	High (>\$100k)	17	78%*
Employment	Working FT / PT / Casual	41	89%
	Retired	19	68%*
	Other	21	67%*
Solar	Solar PVs	21	78%*
	No Solar PVs	58	79%
	Solar hot water	8	78%**
	Neither	54	79%
Switched Energy Company or Plan	In the past 12 months	19	87%*
	1 to 5 years ago	14	74%*
	NETT switched (Last 5 yrs)	33	81%
	Have not switched at all	46	77%
Approached by Energy Company (Last 12 Months)	Yes	26	81%*
	No	50	79%
Actively Investigated Options	Yes	21	72%*
	No	58	81%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	33	81%
	Medium (\$300 to \$499)	22	85%*
	High (\$500+)	18	72%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	81%
	Medium (\$200 to \$300)	12	84%*
	High (\$300+)	19	90%*
Customer Segments	Vulnerable Low Income	11	68%*
	Vulnerable Mid Income	6	84%**
	Vulnerable High Income	6	100%**
	Low Income Retired	12	76%*
	Average	14	69%*
	Secure Retired	6	60%**
	Secure High Income	24	89%*
Willingness To Take Risks	Low (0-4)	16	75%*
	Medium (5-7)	32	75%
	High (8-10)	16	82%*
Technology Adopter	Innovator	5	86%**
	Early Adopter	16	86%*
	Early Majority	26	65%*
	Late Majority	11	92%*
	Laggard	6	69%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		425	71%
Location	Metro	283	73%
	Regional	142	65%
Gas (Dual Fuel)	Yes	79	79%
	No (Electricity only)	343	69%
Age Group	18 - 34	80	76%
	35 - 54	167	64%
	55+	178	73%
Home Ownership	Owners	291	68%
	Renters / Other	134	77%
Household Income (Annual)	Low (<\$50k)	150	74%
	Medium (\$50k -<\$100k)	135	75%
	High (>\$100k)	92	64%
Employment	Working FT / PT / Casual	201	68%
	Retired	128	76%
	Other	101	68%
Solar	Solar PVs	135	67%
	No Solar PVs	290	72%
	Solar hot water	61	61%
	Neither	267	73%
Switched Energy Company or Plan	In the past 12 months	77	72%
	1 to 5 years ago	103	60%
	NETT switched (Last 5 yrs)	180	65%
	Have not switched at all	245	75%
Approached by Energy Company (Last 12 Months)	Yes	101	69%
	No	287	72%
Actively Investigated Options	Yes	111	64%
	No	306	74%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	75%
	Medium (\$300 to \$499)	120	75%
	High (\$500+)	102	63%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	82%
	Medium (\$200 to \$300)	12	63%*
	High (\$300+)	19	86%*
Customer Segments	Vulnerable Low Income	51	69%
	Vulnerable Mid Income	34	58%
	Vulnerable High Income	12	82%*
	Low Income Retired	74	79%
	Average	86	69%
	Secure Retired	50	70%
	Secure High Income	118	70%
Willingness To Take Risks	Low (0-4)	97	68%
	Medium (5-7)	168	70%
	High (8-10)	66	78%
Technology Adopter	Innovator	18	69%*
	Early Adopter	61	74%
	Early Majority	139	72%
	Late Majority	70	71%
	Laggard	44	64%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q8. How would you rate the overall quality of customer service provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		79	76%
Location	Metro	59	73%
	Regional	20	82%*
Gas (Dual Fuel)	Yes	79	76%
	No (Electricity only)	0	-
Age Group	18 - 34	25	92%*
	35 - 54	26	59%*
	55+	28	73%*
Home Ownership	Owners	52	71%
	Renters / Other	27	84%*
Household Income (Annual)	Low (<\$50k)	27	69%*
	Medium (\$50k -<\$100k)	27	89%*
	High (>\$100k)	17	67%*
Employment	Working FT / PT / Casual	41	78%
	Retired	19	73%*
	Other	21	71%*
Solar	Solar PVs	21	75%*
	No Solar PVs	58	76%
	Solar hot water	8	68%**
	Neither	54	76%
Switched Energy Company or Plan	In the past 12 months	19	81%*
	1 to 5 years ago	14	63%*
	NETT switched (Last 5 yrs)	33	73%
	Have not switched at all	46	77%
Approached by Energy Company (Last 12 Months)	Yes	26	75%*
	No	50	79%
Actively Investigated Options	Yes	21	67%*
	No	58	79%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	33	84%
	Medium (\$300 to \$499)	22	72%*
	High (\$500+)	18	69%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	78%
	Medium (\$200 to \$300)	12	78%*
	High (\$300+)	19	82%*
Customer Segments	Vulnerable Low Income	11	68%*
	Vulnerable Mid Income	6	88%**
	Vulnerable High Income	6	85%**
	Low Income Retired	12	83%*
	Average	14	61%*
	Secure Retired	6	60%**
	Secure High Income	24	82%*
Willingness To Take Risks	Low (0-4)	16	75%*
	Medium (5-7)	32	69%
	High (8-10)	16	82%*
Technology Adopter	Innovator	5	86%**
	Early Adopter	16	68%*
	Early Majority	26	69%*
	Late Majority	11	92%*
	Laggard	6	69%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		425	56%
Location	Metro	283	58%
	Regional	142	53%
Gas (Dual Fuel)	Yes	79	68%
	No (Electricity only)	343	54%
Age Group	18 - 34	80	68%
	35 - 54	167	49%
	55+	178	57%
Home Ownership	Owners	291	55%
	Renters / Other	134	60%
Household Income (Annual)	Low (<\$50k)	150	58%
	Medium (\$50k -<\$100k)	135	58%
	High (>\$100k)	92	58%
Employment	Working FT / PT / Casual	201	56%
	Retired	128	56%
	Other	101	58%
Solar	Solar PVs	135	60%
	No Solar PVs	290	55%
	Solar hot water	61	51%
	Neither	267	55%
Switched Energy Company or Plan	In the past 12 months	77	59%
	1 to 5 years ago	103	49%
	NETT switched (Last 5 yrs)	180	53%
	Have not switched at all	245	59%
Approached by Energy Company (Last 12 Months)	Yes	101	56%
	No	287	56%
Actively Investigated Options	Yes	111	47%
	No	306	61%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	61%
	Medium (\$300 to \$499)	120	56%
	High (\$500+)	102	52%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	66%
	Medium (\$200 to \$300)	12	54%*
	High (\$300+)	19	81%*
Customer Segments	Vulnerable Low Income	51	51%
	Vulnerable Mid Income	34	51%
	Vulnerable High Income	12	73%*
	Low Income Retired	74	61%
	Average	86	56%
	Secure Retired	50	47%
	Secure High Income	118	60%
Willingness To Take Risks	Low (0-4)	97	55%
	Medium (5-7)	168	55%
	High (8-10)	66	66%
Technology Adopter	Innovator	18	63%*
	Early Adopter	61	59%
	Early Majority	139	55%
	Late Majority	70	59%
	Laggard	44	57%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q9. How would you rate the overall value for money of the products and services provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		79	70%
Location	Metro	59	69%
	Regional	20	73%*
Gas (Dual Fuel)	Yes	79	70%
	No (Electricity only)	0	-
Age Group	18 - 34	25	88%*
	35 - 54	26	52%*
	55+	28	67%*
Home Ownership	Owners	52	65%
	Renters / Other	27	80%*
Household Income (Annual)	Low (<\$50k)	27	62%*
	Medium (\$50k -<\$100k)	27	89%*
	High (>\$100k)	17	57%*
Employment	Working FT / PT / Casual	41	72%
	Retired	19	64%*
	Other	21	71%*
Solar	Solar PVs	21	72%*
	No Solar PVs	58	69%
	Solar hot water	8	68%**
	Neither	54	68%
Switched Energy Company or Plan	In the past 12 months	19	76%*
	1 to 5 years ago	14	63%*
	NETT switched (Last 5 yrs)	33	70%
	Have not switched at all	46	70%
Approached by Energy Company (Last 12 Months)	Yes	26	71%*
	No	50	72%
Actively Investigated Options	Yes	21	63%*
	No	58	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	33	78%
	Medium (\$300 to \$499)	22	64%*
	High (\$500+)	18	65%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	76%
	Medium (\$200 to \$300)	12	63%*
	High (\$300+)	19	71%*
Customer Segments	Vulnerable Low Income	11	68%*
	Vulnerable Mid Income	6	72%**
	Vulnerable High Income	6	85%**
	Low Income Retired	12	76%*
	Average	14	61%*
	Secure Retired	6	45%**
	Secure High Income	24	75%*
Willingness To Take Risks	Low (0-4)	16	63%*
	Medium (5-7)	32	67%
	High (8-10)	16	82%*
Technology Adopter	Innovator	5	86%**
	Early Adopter	16	63%*
	Early Majority	26	65%*
	Late Majority	11	85%*
	Laggard	6	69%**

*Small sample size (n<30). **Extremely small sample size (n<10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		425	60%	12%
Location	Metro	283	62%	12%
	Regional	142	54%	14%
Gas (Dual Fuel)	Yes	79	65%	10%
	No (Electricity only)	343	59%	13%
Age Group	18 - 34	80	70%	5%
	35 - 54	167	55%	16%
	55+	178	58%	13%
Home Ownership	Owners	291	59%	14%
	Renters / Other	134	61%	9%
Household Income (Annual)	Low (<\$50k)	150	61%	11%
	Medium (\$50k -<\$100k)	135	60%	14%
	High (>\$100k)	92	66%	14%
Employment	Working FT / PT / Casual	201	64%	12%
	Retired	128	57%	12%
	Other	101	56%	13%
Solar	Solar PVs	135	64%	12%
	No Solar PVs	290	58%	13%
	Solar hot water	61	61%	12%
	Neither	267	58%	12%
Switched Energy Company or Plan	In the past 12 months	77	73%	16%
	1 to 5 years ago	103	56%	20%
	NETT switched (Last 5 yrs)	180	63%	18%
	Have not switched at all	245	57%	8%
Approached by Energy Company (Last 12 Months)	Yes	101	65%	13%
	No	287	59%	13%
Actively Investigated Options	Yes	111	63%	20%
	No	306	59%	10%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	64%	10%
	Medium (\$300 to \$499)	120	62%	11%
	High (\$500+)	102	57%	19%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	55%	15%
	Medium (\$200 to \$300)	12	84%*	0%*
	High (\$300+)	19	91%*	0%*
Customer Segments	Vulnerable Low Income	51	58%	10%
	Vulnerable Mid Income	34	61%	14%
	Vulnerable High Income	12	73%*	10%*
	Low Income Retired	74	57%	15%
	Average	86	57%	14%
	Secure Retired	50	57%	8%
	Secure High Income	118	65%	12%
Willingness To Take Risks	Low (0-4)	97	52%	15%
	Medium (5-7)	168	60%	10%
	High (8-10)	66	71%	10%
Technology Adopter	Innovator	18	78%*	5%*
	Early Adopter	61	67%	19%
	Early Majority	139	57%	12%
	Late Majority	70	62%	8%
	Laggard	44	49%	7%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		178	77%	8%
Location	Metro	115	79%	6%
	Regional	63	71%	12%
Gas (Dual Fuel)	Yes	31	87%	3%
	No (Electricity only)	146	74%	9%
Age Group	18 - 34	35	75%	11%
	35 - 54	66	78%	7%
	55+	77	76%	8%
Home Ownership	Owners	124	77%	6%
	Renters / Other	54	76%	13%
Household Income (Annual)	Low (<\$50k)	63	76%	7%
	Medium (\$50k -<\$100k)	55	73%	13%
	High (>\$100k)	44	81%	4%
Employment	Working FT / PT / Casual	87	79%	8%
	Retired	51	75%	10%
	Other	42	72%	7%
Solar	Solar PVs	58	84%	7%
	No Solar PVs	120	73%	9%
	Solar hot water	29	74%*	3%*
	Neither	110	74%	9%
Switched Energy Company or Plan	In the past 12 months	77	78%	11%
	1 to 5 years ago	101	76%	6%
	NETT switched (Last 5 yrs)	178	77%	8%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	62	77%	11%
	No	97	78%	6%
Actively Investigated Options	Yes	76	77%	9%
	No	102	76%	7%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	79%	7%
	Medium (\$300 to \$499)	54	80%	5%
	High (\$500+)	41	67%	17%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	15	85%*	0%*
	Medium (\$200 to \$300)	6	87%**	0%**
	High (\$300+)	9	100%**	0%**
Customer Segments	Vulnerable Low Income	26	75%*	6%*
	Vulnerable Mid Income	14	51%*	29%*
	Vulnerable High Income	6	84%**	0%**
	Low Income Retired	32	70%	8%
	Average	29	81%*	0%*
	Secure Retired	19	83%*	11%*
	Secure High Income	52	82%	7%
Willingness To Take Risks	Low (0-4)	32	74%	8%
	Medium (5-7)	73	73%	10%
	High (8-10)	30	80%	7%
Technology Adopter	Innovator	10	56%*	20%*
	Early Adopter	32	79%	10%
	Early Majority	58	76%	7%
	Late Majority	24	82%*	3%*
	Laggard	11	53%*	19%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		178	81%	8%
Location	Metro	115	81%	7%
	Regional	63	80%	11%
Gas (Dual Fuel)	Yes	31	84%	6%
	No (Electricity only)	146	80%	9%
Age Group	18 - 34	35	77%	9%
	35 - 54	66	79%	7%
	55+	77	83%	9%
Home Ownership	Owners	124	81%	7%
	Renters / Other	54	80%	10%
Household Income (Annual)	Low (<\$50k)	63	85%	8%
	Medium (\$50k -<\$100k)	55	74%	10%
	High (>\$100k)	44	81%	4%
Employment	Working FT / PT / Casual	87	82%	10%
	Retired	51	85%	4%
	Other	42	68%	12%
Solar	Solar PVs	58	86%	7%
	No Solar PVs	120	78%	9%
	Solar hot water	29	81%*	10%*
	Neither	110	77%	9%
Switched Energy Company or Plan	In the past 12 months	77	84%	8%
	1 to 5 years ago	101	78%	8%
	NETT switched (Last 5 yrs)	178	81%	8%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	62	85%	12%
	No	97	79%	6%
Actively Investigated Options	Yes	76	82%	12%
	No	102	79%	5%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	83%	7%
	Medium (\$300 to \$499)	54	87%	5%
	High (\$500+)	41	66%	17%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	15	78%*	7%*
	Medium (\$200 to \$300)	6	87%**	13%**
	High (\$300+)	9	100%**	0%**
Customer Segments	Vulnerable Low Income	26	80%*	17%*
	Vulnerable Mid Income	14	43%*	23%*
	Vulnerable High Income	6	100%**	0%**
	Low Income Retired	32	86%	3%
	Average	29	76%*	7%*
	Secure Retired	19	84%*	5%*
	Secure High Income	52	86%	6%
Willingness To Take Risks	Low (0-4)	32	85%	6%
	Medium (5-7)	73	74%	8%
	High (8-10)	30	82%	12%
Technology Adopter	Innovator	10	58%*	27%*
	Early Adopter	32	79%	13%
	Early Majority	58	80%	5%
	Late Majority	24	82%*	0%*
	Laggard	11	80%*	20%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		425	62%
Location	Metro	283	65%
	Regional	142	58%
Gas (Dual Fuel)	Yes	79	59%
	No (Electricity only)	343	63%
Age Group	18 - 34	80	74%
	35 - 54	167	62%
	55+	178	58%
Home Ownership	Owners	291	60%
	Renters / Other	134	67%
Household Income (Annual)	Low (<\$50k)	150	63%
	Medium (\$50k -<\$100k)	135	64%
	High (>\$100k)	92	71%
Employment	Working FT / PT / Casual	201	68%
	Retired	128	57%
	Other	101	60%
Solar	Solar PVs	135	70%
	No Solar PVs	290	59%
	Solar hot water	61	62%
	Neither	267	59%
Switched Energy Company or Plan	In the past 12 months	77	78%
	1 to 5 years ago	103	62%
	NETT switched (Last 5 yrs)	180	69%
	Have not switched at all	245	58%
Approached by Energy Company (Last 12 Months)	Yes	101	60%
	No	287	64%
Actively Investigated Options	Yes	111	70%
	No	306	60%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	66%
	Medium (\$300 to \$499)	120	65%
	High (\$500+)	102	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	51%
	Medium (\$200 to \$300)	12	63%*
	High (\$300+)	19	82%*
Customer Segments	Vulnerable Low Income	51	64%
	Vulnerable Mid Income	34	55%
	Vulnerable High Income	12	83%*
	Low Income Retired	74	59%
	Average	86	55%
	Secure Retired	50	53%
	Secure High Income	118	75%
Willingness To Take Risks	Low (0-4)	97	59%
	Medium (5-7)	168	61%
	High (8-10)	66	78%
Technology Adopter	Innovator	18	74%*
	Early Adopter	61	73%
	Early Majority	139	62%
	Late Majority	70	70%
	Laggard	44	46%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		425	62%
Location	Metro	283	62%
	Regional	142	62%
Gas (Dual Fuel)	Yes	79	65%
	No (Electricity only)	343	61%
Age Group	18 - 34	80	69%
	35 - 54	167	57%
	55+	178	63%
Home Ownership	Owners	291	61%
	Renters / Other	134	65%
Household Income (Annual)	Low (<\$50k)	150	64%
	Medium (\$50k -<\$100k)	135	65%
	High (>\$100k)	92	62%
Employment	Working FT / PT / Casual	201	65%
	Retired	128	63%
	Other	101	56%
Solar	Solar PVs	135	68%
	No Solar PVs	290	59%
	Solar hot water	61	67%
	Neither	267	60%
Switched Energy Company or Plan	In the past 12 months	77	64%
	1 to 5 years ago	103	56%
	NETT switched (Last 5 yrs)	180	59%
	Have not switched at all	245	64%
Approached by Energy Company (Last 12 Months)	Yes	101	62%
	No	287	61%
Actively Investigated Options	Yes	111	66%
	No	306	61%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	70%
	Medium (\$300 to \$499)	120	61%
	High (\$500+)	102	60%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	61%
	Medium (\$200 to \$300)	12	75%*
	High (\$300+)	19	81%*
Customer Segments	Vulnerable Low Income	51	67%
	Vulnerable Mid Income	34	48%
	Vulnerable High Income	12	66%*
	Low Income Retired	74	65%
	Average	86	52%
	Secure Retired	50	60%
	Secure High Income	118	70%
Willingness To Take Risks	Low (0-4)	97	56%
	Medium (5-7)	168	62%
	High (8-10)	66	79%
Technology Adopter	Innovator	18	78%*
	Early Adopter	61	71%
	Early Majority	139	61%
	Late Majority	70	67%
	Laggard	44	52%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		425	78%	65%	51%	45%	43%	40%	35%
Location	Metro	283	78%	67%	52%	46%	43%	41%	36%
	Regional	142	77%	62%	49%	42%	44%	39%	31%
Gas (Dual Fuel)	Yes	79	79%	66%	50%	49%	46%	52%	42%
	No (Electricity only)	343	78%	65%	51%	44%	43%	38%	33%
Age Group	18 - 34	80	74%	67%	41%	51%	53%	45%	53%
	35 - 54	167	75%	67%	51%	46%	43%	41%	34%
	55+	178	81%	63%	55%	41%	39%	38%	28%
Home Ownership	Owners	291	79%	67%	52%	44%	43%	40%	35%
	Renters / Other	134	76%	61%	47%	46%	43%	41%	35%
Household Income (Annual)	Low (<\$50k)	150	80%	64%	51%	45%	44%	39%	26%
	Medium (\$50k -<\$100k)	135	82%	69%	56%	45%	41%	38%	34%
	High (>\$100k)	92	76%	61%	43%	41%	48%	45%	43%
Employment	Working FT / PT / Casual	201	75%	63%	47%	46%	47%	40%	44%
	Retired	128	78%	64%	58%	41%	38%	42%	23%
	Other	101	83%	71%	50%	52%	45%	39%	35%
Solar	Solar PVs	135	80%	63%	47%	35%	42%	36%	27%
	No Solar PVs	290	77%	66%	53%	49%	44%	42%	38%
	Solar hot water	61	79%	66%	52%	43%	46%	43%	35%
	Neither	267	78%	65%	52%	49%	43%	42%	38%
Switched Energy Company or Plan	In the past 12 months	77	91%	59%	43%	38%	29%	25%	22%
	1 to 5 years ago	103	86%	65%	52%	42%	37%	39%	28%
	NETT switched (Last 5 yrs)	180	88%	63%	48%	40%	34%	33%	26%
	Have not switched at all	245	70%	67%	53%	48%	50%	46%	41%
Approached by Energy Company (Last 12 Months)	Yes	101	81%	69%	56%	43%	45%	38%	36%
	No	287	77%	63%	51%	45%	44%	42%	36%
Actively Investigated Options	Yes	111	88%	62%	48%	30%	31%	29%	22%
	No	306	75%	67%	53%	51%	49%	45%	40%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	81%	62%	46%	42%	43%	41%	28%
	Medium (\$300 to \$499)	120	83%	64%	54%	43%	40%	35%	38%
	High (\$500+)	102	75%	72%	60%	51%	48%	49%	41%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	77%	55%	45%	35%	40%	43%	28%
	Medium (\$200 to \$300)	12	67%*	75%*	53%*	68%*	40%*	55%*	49%*
	High (\$300+)	19	89%*	85%*	75%*	75%*	71%*	75%*	69%*
Customer Segments	Vulnerable Low Income	51	75%	59%	51%	44%	42%	32%	42%
	Vulnerable Mid Income	34	79%	72%	38%	49%	41%	37%	40%
	Vulnerable High Income	12	84%*	100%*	56%*	74%*	65%*	57%*	42%*
	Low Income Retired	74	75%	61%	59%	43%	39%	39%	26%
	Average	86	77%	68%	43%	42%	39%	30%	33%
	Secure Retired	50	83%	68%	56%	37%	39%	47%	19%
Willingness To Take Risks	Secure High Income	118	77%	62%	51%	48%	51%	49%	46%
	Low (0-4)	97	80%	64%	55%	47%	41%	41%	42%
	Medium (5-7)	168	75%	62%	46%	39%	29%	32%	24%
Technology Adopter	High (8-10)	66	75%	63%	46%	39%	39%	42%	29%
	Innovator	18	74%*	76%*	60%*	61%*	46%*	52%*	39%*
	Early Adopter	61	85%	62%	50%	36%	32%	42%	27%
	Early Majority	139	79%	64%	48%	42%	30%	31%	28%
	Late Majority	70	75%	65%	47%	39%	37%	33%	29%
	Laggard	44	61%	51%	46%	45%	40%	42%	37%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		425	3%	15%	13%	26%	23%	28%	36%
Location	Metro	283	4%	13%	13%	25%	21%	25%	34%
	Regional	142	2%	20%	15%	30%	27%	33%	40%
Gas (Dual Fuel)	Yes	79	2%	17%	9%	20%	19%	20%	26%
	No (Electricity only)	343	3%	15%	14%	28%	24%	29%	38%
Age Group	18 - 34	80	4%	16%	17%	18%	17%	29%	20%
	35 - 54	167	4%	12%	17%	28%	23%	30%	37%
	55+	178	2%	17%	9%	29%	25%	25%	42%
Home Ownership	Owners	291	4%	13%	13%	27%	25%	27%	38%
	Renters / Other	134	2%	19%	13%	24%	19%	28%	31%
Household Income (Annual)	Low (<\$50k)	150	2%	16%	12%	25%	19%	24%	38%
	Medium (\$50k -<\$100k)	135	2%	17%	14%	30%	31%	35%	42%
	High (>\$100k)	92	5%	12%	15%	28%	23%	32%	30%
Employment	Working FT / PT / Casual	201	2%	13%	16%	25%	23%	30%	31%
	Retired	128	4%	17%	9%	30%	23%	23%	42%
	Other	101	3%	16%	16%	23%	20%	29%	36%
Solar	Solar PVs	135	3%	16%	16%	31%	30%	32%	42%
	No Solar PVs	290	3%	15%	12%	24%	20%	25%	33%
	Solar hot water	61	7%	16%	12%	33%	23%	29%	46%
	Neither	267	3%	16%	13%	25%	20%	26%	33%
Switched Energy Company or Plan	In the past 12 months	77	1%	24%	15%	41%	40%	43%	58%
	1 to 5 years ago	103	3%	20%	21%	36%	33%	40%	45%
	NETT switched (Last 5 yrs)	180	2%	22%	18%	38%	36%	41%	50%
	Have not switched at all	245	4%	10%	18%	18%	13%	17%	25%
Approached by Energy Company (Last 12 Months)	Yes	101	4%	16%	14%	28%	30%	44%	40%
	No	287	3%	16%	13%	26%	22%	22%	35%
Actively Investigated Options	Yes	111	4%	28%	18%	47%	41%	50%	56%
	No	306	3%	11%	12%	19%	17%	19%	29%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	167	2%	19%	14%	27%	24%	31%	41%
	Medium (\$300 to \$499)	120	3%	19%	15%	29%	23%	28%	36%
	High (\$500+)	102	5%	8%	7%	26%	23%	25%	32%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	39	0%	21%	10%	27%	26%	25%	32%
	Medium (\$200 to \$300)	12	0%*	18%*	19%*	6%*	16%*	22%*	23%*
	High (\$300+)	19	6%*	5%*	0%*	14%*	14%*	10%*	20%*
Customer Segments	Vulnerable Low Income	51	5%	25%	12%	25%	18%	31%	28%
	Vulnerable Mid Income	34	5%	15%	19%	22%	22%	39%	32%
	Vulnerable High Income	12	0%*	0%*	27%*	18%*	9%*	26%*	40%*
	Low Income Retired	74	4%	18%	6%	27%	21%	25%	40%
	Average	86	1%	9%	16%	25%	26%	31%	38%
	Secure Retired	50	2%	14%	12%	33%	24%	19%	46%
Willingness To Take Risks	Secure High Income	118	3%	15%	15%	26%	25%	27%	30%
	Low (0-4)	97	1%	15%	8%	20%	20%	23%	30%
	Medium (5-7)	168	3%	17%	13%	27%	27%	28%	37%
Technology Adopter	High (8-10)	66	3%	17%	10%	30%	30%	36%	44%
	Innovator	18	15%*	16%*	16%*	20%*	31%*	37%*	34%*
	Early Adopter	61	2%	22%	12%	38%	33%	35%	48%
	Early Majority	139	1%	16%	12%	23%	29%	30%	38%
	Late Majority	70	0%	13%	10%	25%	21%	23%	34%
	Laggard	44	5%	17%	5%	18%	8%	13%	19%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Appendix Four, Part B: Rest of Queensland

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		150	49%
Location	Metro	0	-
	Regional	150	49%
Gas (Dual Fuel)	Yes	9	57%**
	No (Electricity only)	139	49%
Age Group	18 - 34	18	50%*
	35 - 54	51	50%
	55+	81	49%
Home Ownership	Owners	112	51%
	Renters / Other	38	43%
Household Income (Annual)	Low (<\$50k)	71	48%
	Medium (\$50k -<\$100k)	49	49%
	High (>\$100k)	19	52%*
Employment	Working FT / PT / Casual	48	48%
	Retired	58	51%
	Other	48	47%
Solar	Solar PVs	58	56%
	No Solar PVs	92	45%
	Solar hot water	28	52%*
	Neither	84	43%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	49%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	53%
	Medium (\$300 to \$499)	54	46%
	High (\$500+)	37	49%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	51%**
	Medium (\$200 to \$300)	1	0%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	43%*
	Vulnerable Mid Income	16	50%*
	Vulnerable High Income	1	0%**
	Low Income Retired	35	52%
	Average	28	44%*
	Secure Retired	18	50%*
	Secure High Income	26	59%*
Willingness To Take Risks	Low (0-4)	27	59%*
	Medium (5-7)	71	49%
	High (8-10)	22	51%*
Technology Adopter	Innovator	6	35%**
	Early Adopter	20	60%*
	Early Majority	52	41%
	Late Majority	30	63%
	Laggard	15	64%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		150	46%
Location	Metro	0	-
	Regional	150	46%
Gas (Dual Fuel)	Yes	9	53%**
	No (Electricity only)	139	44%
Age Group	18 - 34	18	45%*
	35 - 54	51	49%
	55+	81	45%
Home Ownership	Owners	112	49%
	Renters / Other	38	35%
Household Income (Annual)	Low (<\$50k)	71	46%
	Medium (\$50k -<\$100k)	49	46%
	High (>\$100k)	19	46%*
Employment	Working FT / PT / Casual	48	44%
	Retired	58	53%
	Other	48	33%
Solar	Solar PVs	58	54%
	No Solar PVs	92	41%
	Solar hot water	28	45%*
	Neither	84	41%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	46%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	48%
	Medium (\$300 to \$499)	54	45%
	High (\$500+)	37	47%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	42%**
	Medium (\$200 to \$300)	1	0%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	31%*
	Vulnerable Mid Income	16	57%*
	Vulnerable High Income	1	0%**
	Low Income Retired	35	52%
	Average	28	37%*
	Secure Retired	18	56%*
	Secure High Income	26	46%*
Willingness To Take Risks	Low (0-4)	27	36%*
	Medium (5-7)	71	49%
	High (8-10)	22	47%*
Technology Adopter	Innovator	6	35%**
	Early Adopter	20	55%*
	Early Majority	52	40%
	Late Majority	30	50%
	Laggard	15	51%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		150	25%	1%	38%
Location	Metro	0	-	-	-
	Regional	150	25%	1%	38%
Gas (Dual Fuel)	Yes	9	21%**	0%**	68%**
	No (Electricity only)	139	25%	1%	36%
Age Group	18 - 34	18	28%*	0%*	56%*
	35 - 54	51	19%	2%	50%
	55+	81	27%	1%	29%
Home Ownership	Owners	112	25%	1%	38%
	Renters / Other	38	26%	2%	39%
Household Income (Annual)	Low (<\$50k)	71	27%	3%	31%
	Medium (\$50k -<\$100k)	49	27%	0%	44%
	High (>\$100k)	19	23%*	0%*	40%*
Employment	Working FT / PT / Casual	48	30%	0%	38%
	Retired	58	29%	2%	26%
	Other	48	18%	1%	52%
Solar	Solar PVs	58	19%	3%	42%
	No Solar PVs	92	29%	0%	35%
	Solar hot water	28	26%*	7%*	28%*
	Neither	84	29%	0%	36%
Switched Energy Company or Plan	In the past 12 months	0	-	-	-
	1 to 5 years ago	0	-	-	-
	NETT switched (Last 5 yrs)	0	-	-	-
	Have not switched at all	150	25%	1%	38%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-	-
	No	0	-	-	-
Actively Investigated Options	Yes	0	-	-	-
	No	0	-	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	35%	0%	23%
	Medium (\$300 to \$499)	54	19%	2%	41%
	High (\$500+)	37	18%	0%	54%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	16%**	0%**	58%**
	Medium (\$200 to \$300)	1	0%**	0%**	100%**
	High (\$300+)	1	0%**	0%**	100%**
Customer Segments	Vulnerable Low Income	26	23%*	0%*	45%*
	Vulnerable Mid Income	16	6%*	0%*	77%*
	Vulnerable High Income	1	0%**	0%**	100%**
	Low Income Retired	35	27%	3%	26%
	Average	28	26%*	2%*	35%*
	Secure Retired	18	35%*	0%*	23%*
	Secure High Income	26	26%*	0%*	40%*
Willingness To Take Risks	Low (0-4)	27	36%*	0%*	34%*
	Medium (5-7)	71	20%	1%	38%
	High (8-10)	22	18%*	0%*	44%*
Technology Adopter	Innovator	6	20%**	0%**	15%**
	Early Adopter	20	0%*	0%*	52%*
	Early Majority	52	24%	0%	38%
	Late Majority	30	21%	0%	48%
	Laggard	15	63%*	4%*	11%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		150	57%
Location	Metro	0	-
	Regional	150	57%
Gas (Dual Fuel)	Yes	9	72%**
	No (Electricity only)	139	56%
Age Group	18 - 34	18	73%*
	35 - 54	51	43%
	55+	81	60%
Home Ownership	Owners	112	58%
	Renters / Other	38	53%
Household Income (Annual)	Low (<\$50k)	71	57%
	Medium (\$50k -<\$100k)	49	59%
	High (>\$100k)	19	60%*
Employment	Working FT / PT / Casual	48	62%
	Retired	58	60%
	Other	48	51%
Solar	Solar PVs	58	53%
	No Solar PVs	92	60%
	Solar hot water	28	60%*
	Neither	84	61%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	57%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	68%
	Medium (\$300 to \$499)	54	55%
	High (\$500+)	37	44%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	67%**
	Medium (\$200 to \$300)	1	100%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	56%*
	Vulnerable Mid Income	16	59%*
	Vulnerable High Income	1	100%**
	Low Income Retired	35	62%
	Average	28	39%*
	Secure Retired	18	58%*
	Secure High Income	26	67%*
Willingness To Take Risks	Low (0-4)	27	63%*
	Medium (5-7)	71	57%
	High (8-10)	22	59%*
Technology Adopter	Innovator	6	70%**
	Early Adopter	20	60%*
	Early Majority	52	47%
	Late Majority	30	68%
	Laggard	15	65%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		150	70%
Location	Metro	0	-
	Regional	150	70%
Gas (Dual Fuel)	Yes	9	64%**
	No (Electricity only)	139	71%
Age Group	18 - 34	18	62%*
	35 - 54	51	73%
	55+	81	71%
Home Ownership	Owners	112	69%
	Renters / Other	38	76%
Household Income (Annual)	Low (<\$50k)	71	76%
	Medium (\$50k -<\$100k)	49	68%
	High (>\$100k)	19	65%*
Employment	Working FT / PT / Casual	48	69%
	Retired	58	71%
	Other	48	72%
Solar	Solar PVs	58	65%
	No Solar PVs	92	74%
	Solar hot water	28	72%*
	Neither	84	76%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	70%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	75%
	Medium (\$300 to \$499)	54	72%
	High (\$500+)	37	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	75%**
	Medium (\$200 to \$300)	1	100%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	76%*
	Vulnerable Mid Income	16	69%*
	Vulnerable High Income	1	100%**
	Low Income Retired	35	74%
	Average	28	61%*
	Secure Retired	18	67%*
	Secure High Income	26	72%*
Willingness To Take Risks	Low (0-4)	27	70%*
	Medium (5-7)	71	73%
	High (8-10)	22	80%*
Technology Adopter	Innovator	6	85%**
	Early Adopter	20	68%*
	Early Majority	52	69%
	Late Majority	30	74%
	Laggard	15	82%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		150	51%
Location	Metro	0	-
	Regional	150	51%
Gas (Dual Fuel)	Yes	9	50%**
	No (Electricity only)	139	51%
Age Group	18 - 34	18	45%*
	35 - 54	51	40%
	55+	81	57%
Home Ownership	Owners	112	53%
	Renters / Other	38	45%
Household Income (Annual)	Low (<\$50k)	71	62%
	Medium (\$50k -<\$100k)	49	42%
	High (>\$100k)	19	49%*
Employment	Working FT / PT / Casual	48	43%
	Retired	58	61%
	Other	48	46%
Solar	Solar PVs	58	51%
	No Solar PVs	92	51%
	Solar hot water	28	62%*
	Neither	84	51%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	51%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	64%
	Medium (\$300 to \$499)	54	50%
	High (\$500+)	37	33%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	42%**
	Medium (\$200 to \$300)	1	100%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	62%*
	Vulnerable Mid Income	16	37%*
	Vulnerable High Income	1	0%**
	Low Income Retired	35	64%
	Average	28	30%*
	Secure Retired	18	64%*
	Secure High Income	26	39%*
Willingness To Take Risks	Low (0-4)	27	50%*
	Medium (5-7)	71	51%
	High (8-10)	22	56%*
Technology Adopter	Innovator	6	70%**
	Early Adopter	20	43%*
	Early Majority	52	46%
	Late Majority	30	57%
	Laggard	15	63%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		150	24%	42%
Location	Metro	0	-	-
	Regional	150	24%	42%
Gas (Dual Fuel)	Yes	9	39%**	36%**
	No (Electricity only)	139	24%	43%
Age Group	18 - 34	18	27%*	34%*
	35 - 54	51	20%	48%
	55+	81	26%	41%
Home Ownership	Owners	112	24%	44%
	Renters / Other	38	25%	37%
Household Income (Annual)	Low (<\$50k)	71	23%	40%
	Medium (\$50k -<\$100k)	49	35%	43%
	High (>\$100k)	19	15%*	42%*
Employment	Working FT / PT / Casual	48	21%	41%
	Retired	58	32%	38%
	Other	48	14%	52%
Solar	Solar PVs	58	24%	46%
	No Solar PVs	92	25%	40%
	Solar hot water	28	32%*	27%*
	Neither	84	25%	41%
Switched Energy Company or Plan	In the past 12 months	0	-	-
	1 to 5 years ago	0	-	-
	NETT switched (Last 5 yrs)	0	-	-
	Have not switched at all	150	24%	42%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-
	No	0	-	-
Actively Investigated Options	Yes	0	-	-
	No	0	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	29%	37%
	Medium (\$300 to \$499)	54	26%	41%
	High (\$500+)	37	14%	59%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	41%**	59%**
	Medium (\$200 to \$300)	1	0%**	0%**
	High (\$300+)	1	100%**	0%**
Customer Segments	Vulnerable Low Income	26	14%*	50%*
	Vulnerable Mid Income	16	6%*	64%*
	Vulnerable High Income	1	0%**	0%**
	Low Income Retired	35	40%	29%
	Average	28	24%*	39%*
	Secure Retired	18	21%*	45%*
	Secure High Income	26	25%*	44%*
Willingness To Take Risks	Low (0-4)	27	24%*	40%*
	Medium (5-7)	71	15%	40%
	High (8-10)	22	38%*	39%*
Technology Adopter	Innovator	6	50%**	30%**
	Early Adopter	20	39%*	47%*
	Early Majority	52	12%	47%
	Late Majority	30	20%	35%
	Laggard	15	18%*	17%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		150	53%
Location	Metro	0	-
	Regional	150	53%
Gas (Dual Fuel)	Yes	9	54%**
	No (Electricity only)	139	53%
Age Group	18 - 34	18	56%*
	35 - 54	51	53%
	55+	81	52%
Home Ownership	Owners	112	50%
	Renters / Other	38	61%
Household Income (Annual)	Low (<\$50k)	71	55%
	Medium (\$50k -<\$100k)	49	52%
	High (>\$100k)	19	48%*
Employment	Working FT / PT / Casual	48	47%
	Retired	58	56%
	Other	48	49%
Solar	Solar PVs	58	57%
	No Solar PVs	92	50%
	Solar hot water	28	73%*
	Neither	84	50%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	53%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	54%
	Medium (\$300 to \$499)	54	47%
	High (\$500+)	37	55%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	49%**
	Medium (\$200 to \$300)	1	100%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	48%*
	Vulnerable Mid Income	16	69%*
	Vulnerable High Income	1	100%**
	Low Income Retired	35	58%
	Average	28	45%*
	Secure Retired	18	56%*
	Secure High Income	26	42%*
Willingness To Take Risks	Low (0-4)	27	43%*
	Medium (5-7)	71	56%
	High (8-10)	22	70%*
Technology Adopter	Innovator	6	50%**
	Early Adopter	20	58%*
	Early Majority	52	50%
	Late Majority	30	63%
	Laggard	15	53%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?			
		(n=)	NETT Rating (7+)
Total		150	33%
Location	Metro	0	-
	Regional	150	33%
Gas (Dual Fuel)	Yes	9	29%**
	No (Electricity only)	139	33%
Age Group	18 - 34	18	28%*
	35 - 54	51	33%
	55+	81	34%
Home Ownership	Owners	112	33%
	Renters / Other	38	34%
Household Income (Annual)	Low (<\$50k)	71	33%
	Medium (\$50k -<\$100k)	49	33%
	High (>\$100k)	19	31%*
Employment	Working FT / PT / Casual	48	31%
	Retired	58	41%
	Other	48	23%
Solar	Solar PVs	58	31%
	No Solar PVs	92	35%
	Solar hot water	28	42%*
	Neither	84	34%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	150	33%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	35%
	Medium (\$300 to \$499)	54	32%
	High (\$500+)	37	27%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	16%**
	Medium (\$200 to \$300)	1	100%**
	High (\$300+)	1	100%**
Customer Segments	Vulnerable Low Income	26	28%*
	Vulnerable Mid Income	16	30%*
	Vulnerable High Income	1	0%**
	Low Income Retired	35	45%
	Average	28	23%*
	Secure Retired	18	39%*
	Secure High Income	26	27%*
Willingness To Take Risks	Low (0-4)	27	23%*
	Medium (5-7)	71	33%
	High (8-10)	22	52%*
Technology Adopter	Innovator	6	55%**
	Early Adopter	20	35%*
	Early Majority	52	25%
	Late Majority	30	41%
	Laggard	15	42%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		150	65%	59%	44%	40%	46%	26%	21%
Location	Metro	0	-	-	-	-	-	-	-
	Regional	150	65%	59%	44%	40%	46%	26%	21%
Gas (Dual Fuel)	Yes	9	86%**	64%**	39%**	33%**	53%**	7%**	39%**
	No (Electricity only)	139	64%	60%	45%	41%	45%	28%	20%
Age Group	18 - 34	18	73%*	61%*	38%*	17%*	45%*	0%*	22%*
	35 - 54	51	59%	53%	48%	51%	36%	26%	30%
	55+	81	66%	61%	43%	39%	51%	31%	16%
Home Ownership	Owners	112	64%	59%	47%	44%	47%	29%	24%
	Renters / Other	38	70%	59%	35%	25%	42%	17%	10%
Household Income (Annual)	Low (<\$50k)	71	64%	62%	47%	37%	46%	27%	13%
	Medium (\$50k -<\$100k)	49	69%	55%	38%	41%	50%	27%	23%
	High (>\$100k)	19	73%*	64%*	45%*	48%*	47%*	31%*	37%*
Employment	Working FT / PT / Casual	48	63%	58%	45%	38%	48%	24%	33%
	Retired	58	67%	57%	41%	36%	53%	30%	11%
	Other	48	65%	62%	50%	46%	36%	27%	24%
Solar	Solar PVs	58	61%	56%	40%	39%	42%	26%	19%
	No Solar PVs	92	68%	61%	46%	40%	48%	26%	21%
	Solar hot water	28	68%*	65%*	41%*	43%*	53%*	36%*	23%*
	Neither	84	67%	64%	45%	40%	49%	27%	21%
Switched Energy Company or Plan	In the past 12 months	0	-	-	-	-	-	-	-
	1 to 5 years ago	0	-	-	-	-	-	-	-
	NETT switched (Last 5 yrs)	0	-	-	-	-	-	-	-
	Have not switched at all	150	65%	59%	44%	40%	46%	26%	21%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Actively Investigated Options	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	67%	59%	49%	48%	51%	39%	21%
	Medium (\$300 to \$499)	54	64%	64%	43%	37%	49%	18%	22%
	High (\$500+)	37	71%	61%	38%	38%	39%	22%	22%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	100%**	75%**	67%**	26%**	75%**	16%**	42%**
	Medium (\$200 to \$300)	1	100%**	100%**	0%**	100%**	100%**	0%**	100%**
	High (\$300+)	1	100%**	0%**	0%**	0%**	0%**	0%**	0%**
Customer Segments	Vulnerable Low Income	26	71%*	67%*	49%*	34%*	33%*	27%*	12%*
	Vulnerable Mid Income	16	65%*	70%*	42%*	48%*	52%*	16%*	51%*
	Vulnerable High Income	1	0%**	0%**	0%**	100%**	0%**	0%**	0%**
	Low Income Retired	35	72%	58%	44%	38%	55%	37%	11%
	Average	28	56%*	55%*	44%*	44%*	36%*	17%*	17%*
	Secure Retired	18	58%*	53%*	30%*	35%*	56%*	24%*	12%*
Willingness To Take Risks	Secure High Income	26	66%*	58%*	53%*	40%*	43%*	25%*	39%*
	Low (0-4)	27	46%*	53%*	52%*	41%*	35%*	13%*	18%*
	Medium (5-7)	71	55%	62%	43%	36%	39%	24%	19%
Technology Adopter	High (8-10)	22	85%*	47%*	39%*	34%*	44%*	27%*	12%*
	Innovator	6	65%**	35%**	55%**	50%**	55%**	40%**	30%**
	Early Adopter	20	76%*	53%*	46%*	22%*	24%*	14%*	5%*
	Early Majority	52	52%	59%	40%	35%	38%	19%	13%
	Late Majority	30	61%	64%	42%	51%	47%	30%	33%
	Laggard	15	43%*	42%*	47%*	24%*	34%*	13%*	9%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		150	7%	12%	16%	22%	21%	37%	47%
Location	Metro	0	-	-	-	-	-	-	-
	Regional	150	7%	12%	16%	22%	21%	37%	47%
Gas (Dual Fuel)	Yes	9	0%**	11%**	36%**	22%**	33%**	58%**	47%**
	No (Electricity only)	139	7%	12%	15%	22%	20%	36%	48%
Age Group	18 - 34	18	11%*	17%*	11%*	34%*	22%*	45%*	33%*
	35 - 54	51	6%	18%	18%	19%	32%	36%	37%
	55+	81	6%	9%	16%	21%	16%	35%	54%
Home Ownership	Owners	112	7%	13%	15%	21%	21%	37%	51%
	Renters / Other	38	5%	12%	18%	25%	22%	37%	34%
Household Income (Annual)	Low (<\$50k)	71	7%	8%	14%	22%	18%	33%	48%
	Medium (\$50k -<\$100k)	49	6%	17%	21%	19%	25%	41%	54%
	High (>\$100k)	19	0%*	22%*	16%*	26%*	20%*	42%*	35%*
Employment	Working FT / PT / Casual	48	11%	17%	19%	21%	22%	40%	37%
	Retired	58	7%	11%	14%	25%	16%	37%	62%
	Other	48	4%	12%	15%	21%	25%	30%	37%
Solar	Solar PVs	58	7%	9%	15%	13%	18%	35%	60%
	No Solar PVs	92	7%	14%	17%	28%	23%	38%	39%
	Solar hot water	28	8%*	8%*	17%*	13%*	17%*	35%*	50%*
	Neither	84	7%	13%	17%	28%	22%	37%	40%
Switched Energy Company or Plan	In the past 12 months	0	-	-	-	-	-	-	-
	1 to 5 years ago	0	-	-	-	-	-	-	-
	NETT switched (Last 5 yrs)	0	-	-	-	-	-	-	-
	Have not switched at all	150	7%	12%	16%	22%	21%	37%	47%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Actively Investigated Options	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	4%	11%	11%	13%	19%	22%	42%
	Medium (\$300 to \$499)	54	10%	10%	18%	26%	15%	42%	59%
	High (\$500+)	37	5%	21%	20%	35%	31%	53%	41%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	4	0%**	0%**	33%**	0%**	25%**	33%**	58%**
	Medium (\$200 to \$300)	1	0%**	0%**	0%**	0%**	0%**	100%**	0%**
	High (\$300+)	1	0%**	100%**	100%**	100%**	100%**	100%**	100%**
Customer Segments	Vulnerable Low Income	26	8%*	8%*	21%*	20%*	30%*	36%*	39%*
	Vulnerable Mid Income	16	13%*	25%*	13%*	33%*	38%*	51%*	32%*
	Vulnerable High Income	1	0%**	0%**	0%**	0%**	0%**	0%**	100%**
	Low Income Retired	35	6%	12%	17%	32%	16%	40%	59%
	Average	28	7%*	9%*	13%*	17%*	7%*	31%*	29%*
	Secure Retired	18	5%*	11%*	12%*	12%*	6%*	27%*	68%*
	Secure High Income	26	3%*	15%*	19%*	15%*	39%*	40%*	43%*
Willingness To Take Risks	Low (0-4)	27	4%*	3%*	11%*	17%*	33%*	27%*	55%*
	Medium (5-7)	71	9%	9%	9%	17%	14%	32%	38%
	High (8-10)	22	6%*	26%*	18%*	38%*	32%*	51%*	58%*
Technology Adopter	Innovator	6	35%**	50%**	30%**	50%**	30%**	60%**	70%**
	Early Adopter	20	6%*	3%*	10%*	30%*	25%*	48%*	48%*
	Early Majority	52	5%	11%	8%	17%	20%	40%	50%
	Late Majority	30	6%	9%	13%	13%	17%	23%	31%
	Laggard	15	7%*	6%*	11%*	18%*	24%*	11%*	33%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Appendix Five: New South Wales Tables

NB: Tables with total base size of n=<30 are not displayed.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		480	92%
Location	Metro	307	91%
	Regional	173	95%
Gas (Dual Fuel)	Yes	213	91%
	No (Electricity only)	244	94%
Age Group	18 - 34	144	85%
	35 - 54	198	95%
	55+	138	96%
Home Ownership	Owners	329	91%
	Renters / Other	151	94%
Household Income (Annual)	Low (<\$50k)	143	93%
	Medium (\$50k -<\$100k)	147	89%
	High (>\$100k)	130	96%
Employment	Working FT / PT / Casual	259	91%
	Retired	95	95%
	Other	132	90%
Solar	Solar PVs	99	91%
	No Solar PVs	381	92%
	Solar hot water	58	89%
	Neither	342	93%
Switched Energy Company or Plan	In the past 12 months	130	92%
	1 to 5 years ago	107	97%
	NETT switched (Last 5 yrs)	237	94%
	Have not switched at all	243	90%
Approached by Energy Company (Last 12 Months)	Yes	182	95%
	No	260	91%
Actively Investigated Options	Yes	150	93%
	No	317	93%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	92%
	Medium (\$300 to \$499)	143	94%
	High (\$500+)	116	95%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	94%
	Medium (\$200 to \$300)	56	88%
	High (\$300+)	65	92%
Customer Segments	Vulnerable Low Income	62	97%
	Vulnerable Mid Income	46	95%
	Vulnerable High Income	20	95%*
	Low Income Retired	46	96%
	Average	107	88%
	Secure Retired	46	96%
	Secure High Income	153	90%
Willingness To Take Risks	Low (0-4)	86	87%
	Medium (5-7)	218	93%
	High (8-10)	74	91%
Technology Adopter	Innovator	40	87%
	Early Adopter	79	94%
	Early Majority	173	93%
	Late Majority	60	87%
	Laggard	33	91%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q13. Please tell me whether you think the following statements are True or False. b) Consumers in your state [territory] can choose their gas company.			
		(n=)	True
Total		213	88%
Location	Metro	156	91%
	Regional	57	81%
Gas (Dual Fuel)	Yes	213	88%
	No (Electricity only)	0	-
Age Group	18 - 34	77	81%
	35 - 54	87	94%
	55+	49	93%
Home Ownership	Owners	159	88%
	Renters / Other	54	89%
Household Income (Annual)	Low (<\$50k)	48	96%
	Medium (\$50k -<\$100k)	76	83%
	High (>\$100k)	65	90%
Employment	Working FT / PT / Casual	130	86%
	Retired	32	95%
	Other	54	84%
Solar	Solar PVs	51	88%
	No Solar PVs	162	88%
	Solar hot water	21	90%*
	Neither	148	88%
Switched Energy Company or Plan	In the past 12 months	60	94%
	1 to 5 years ago	44	96%
	NETT switched (Last 5 yrs)	104	95%
	Have not switched at all	109	82%
Approached by Energy Company (Last 12 Months)	Yes	92	95%
	No	109	82%
Actively Investigated Options	Yes	67	91%
	No	142	88%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	91%
	Medium (\$300 to \$499)	63	89%
	High (\$500+)	50	93%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	91%
	Medium (\$200 to \$300)	56	92%
	High (\$300+)	65	88%
Customer Segments	Vulnerable Low Income	22	95%*
	Vulnerable Mid Income	17	74%*
	Vulnerable High Income	15	86%*
	Low Income Retired	16	89%*
	Average	45	91%
	Secure Retired	16	100%*
	Secure High Income	82	85%
Willingness To Take Risks	Low (0-4)	29	85%*
	Medium (5-7)	99	88%
	High (8-10)	46	86%
Technology Adopter	Innovator	24	91%*
	Early Adopter	41	82%
	Early Majority	76	87%
	Late Majority	22	92%*
	Laggard	11	91%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		480	82%
Location	Metro	307	82%
	Regional	173	81%
Gas (Dual Fuel)	Yes	213	77%
	No (Electricity only)	244	87%
Age Group	18 - 34	144	76%
	35 - 54	198	84%
	55+	138	86%
Home Ownership	Owners	329	84%
	Renters / Other	151	77%
Household Income (Annual)	Low (<\$50k)	143	82%
	Medium (\$50k -<\$100k)	147	79%
	High (>\$100k)	130	88%
Employment	Working FT / PT / Casual	259	81%
	Retired	95	90%
	Other	132	76%
Solar	Solar PVs	99	85%
	No Solar PVs	381	81%
	Solar hot water	58	85%
	Neither	342	82%
Switched Energy Company or Plan	In the past 12 months	130	88%
	1 to 5 years ago	107	85%
	NETT switched (Last 5 yrs)	237	87%
	Have not switched at all	243	77%
Approached by Energy Company (Last 12 Months)	Yes	182	84%
	No	260	81%
Actively Investigated Options	Yes	150	85%
	No	317	82%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	83%
	Medium (\$300 to \$499)	143	84%
	High (\$500+)	116	82%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	76%
	Medium (\$200 to \$300)	56	81%
	High (\$300+)	65	77%
Customer Segments	Vulnerable Low Income	62	81%
	Vulnerable Mid Income	46	64%
	Vulnerable High Income	20	75%*
	Low Income Retired	46	91%
	Average	107	77%
	Secure Retired	46	90%
	Secure High Income	153	86%
Willingness To Take Risks	Low (0-4)	86	79%
	Medium (5-7)	218	80%
	High (8-10)	74	87%
Technology Adopter	Innovator	40	88%
	Early Adopter	79	84%
	Early Majority	173	83%
	Late Majority	60	69%
	Laggard	33	78%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		213	73%
Location	Metro	156	77%
	Regional	57	63%
Gas (Dual Fuel)	Yes	213	73%
	No (Electricity only)	0	-
Age Group	18 - 34	77	70%
	35 - 54	87	79%
	55+	49	71%
Home Ownership	Owners	159	75%
	Renters / Other	54	68%
Household Income (Annual)	Low (<\$50k)	48	70%
	Medium (\$50k -<\$100k)	76	78%
	High (>\$100k)	65	74%
Employment	Working FT / PT / Casual	130	72%
	Retired	32	81%
	Other	54	69%
Solar	Solar PVs	51	74%
	No Solar PVs	162	73%
	Solar hot water	21	74%*
	Neither	148	75%
Switched Energy Company or Plan	In the past 12 months	60	73%
	1 to 5 years ago	44	76%
	NETT switched (Last 5 yrs)	104	74%
	Have not switched at all	109	72%
Approached by Energy Company (Last 12 Months)	Yes	92	72%
	No	109	75%
Actively Investigated Options	Yes	67	76%
	No	142	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	70%
	Medium (\$300 to \$499)	63	75%
	High (\$500+)	50	75%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	70%
	Medium (\$200 to \$300)	56	77%
	High (\$300+)	65	71%
Customer Segments	Vulnerable Low Income	22	67%*
	Vulnerable Mid Income	17	46%*
	Vulnerable High Income	15	79%*
	Low Income Retired	16	72%*
	Average	45	68%
	Secure Retired	16	88%*
	Secure High Income	82	79%
Willingness To Take Risks	Low (0-4)	29	67%*
	Medium (5-7)	99	68%
	High (8-10)	46	84%
Technology Adopter	Innovator	24	89%*
	Early Adopter	41	82%
	Early Majority	76	68%
	Late Majority	22	55%*
	Laggard	11	56%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?			
		(n=)	Yes
Total		480	32%
Location	Metro	307	31%
	Regional	173	32%
Gas (Dual Fuel)	Yes	213	31%
	No (Electricity only)	244	33%
Age Group	18 - 34	144	26%
	35 - 54	198	32%
	55+	138	37%
Home Ownership	Owners	329	31%
	Renters / Other	151	32%
Household Income (Annual)	Low (<\$50k)	143	37%
	Medium (\$50k -<\$100k)	147	29%
	High (>\$100k)	130	34%
Employment	Working FT / PT / Casual	259	30%
	Retired	95	34%
	Other	132	33%
Solar	Solar PVs	99	43%
	No Solar PVs	381	29%
	Solar hot water	58	41%
	Neither	342	28%
Switched Energy Company or Plan	In the past 12 months	130	64%
	1 to 5 years ago	107	23%
	NETT switched (Last 5 yrs)	237	46%
	Have not switched at all	243	18%
Approached by Energy Company (Last 12 Months)	Yes	182	44%
	No	260	24%
Actively Investigated Options	Yes	150	100%
	No	317	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	35%
	Medium (\$300 to \$499)	143	30%
	High (\$500+)	116	33%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	30%
	Medium (\$200 to \$300)	56	37%
	High (\$300+)	65	32%
Customer Segments	Vulnerable Low Income	62	32%
	Vulnerable Mid Income	46	32%
	Vulnerable High Income	20	70%*
	Low Income Retired	46	30%
	Average	107	26%
	Secure Retired	46	40%
	Secure High Income	153	27%
Willingness To Take Risks	Low (0-4)	86	21%
	Medium (5-7)	218	31%
	High (8-10)	74	51%
Technology Adopter	Innovator	40	43%
	Early Adopter	79	36%
	Early Majority	173	35%
	Late Majority	60	22%
	Laggard	33	13%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q51. The last time you switched your electricity company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		230	68%	15%
Location	Metro	140	66%	17%
	Regional	90	72%	12%
Gas (Dual Fuel)	Yes	97	70%	16%
	No (Electricity only)	128	67%	15%
Age Group	18 - 34	53	76%	7%
	35 - 54	102	63%	18%
	55+	75	67%	17%
Home Ownership	Owners	159	68%	15%
	Renters / Other	71	67%	16%
Household Income (Annual)	Low (<\$50k)	76	70%	20%
	Medium (\$50k -<\$100k)	70	72%	13%
	High (>\$100k)	57	59%	16%
Employment	Working FT / PT / Casual	115	66%	16%
	Retired	52	67%	19%
	Other	67	69%	11%
Solar	Solar PVs	54	65%	20%
	No Solar PVs	176	69%	13%
	Solar hot water	38	69%	16%
	Neither	155	68%	14%
Switched Energy Company or Plan	In the past 12 months	127	68%	18%
	1 to 5 years ago	103	67%	11%
	NETT switched (Last 5 yrs)	230	68%	15%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	115	69%	17%
	No	102	68%	11%
Actively Investigated Options	Yes	106	74%	15%
	No	122	63%	16%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	93	75%	13%
	Medium (\$300 to \$499)	73	66%	18%
	High (\$500+)	45	62%	17%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	30	75%	19%
	Medium (\$200 to \$300)	33	78%	11%
	High (\$300+)	25	62%*	19%*
Customer Segments	Vulnerable Low Income	34	69%	18%
	Vulnerable Mid Income	23	55%*	25%*
	Vulnerable High Income	11	73%*	10%*
	Low Income Retired	24	75%*	13%*
	Average	49	70%	11%
	Secure Retired	27	61%*	25%*
	Secure High Income	62	69%	10%
Willingness To Take Risks	Low (0-4)	36	66%	13%
	Medium (5-7)	101	67%	14%
	High (8-10)	34	89%	4%
Technology Adopter	Innovator	13	67%*	24%*
	Early Adopter	39	80%	14%
	Early Majority	86	68%	8%
	Late Majority	26	73%*	21%*
	Laggard	10	68%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q56. The last time you switched your gas company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		72	66%	10%
Location	Metro	56	67%	9%
	Regional	16	61%*	12%*
Gas (Dual Fuel)	Yes	72	66%	10%
	No (Electricity only)	0	-	-
Age Group	18 - 34	21	81%*	0%*
	35 - 54	34	68%	11%
	55+	17	47%*	19%*
Home Ownership	Owners	54	69%	10%
	Renters / Other	18	58%*	9%*
Household Income (Annual)	Low (<\$50k)	20	71%*	13%*
	Medium (\$50k -<\$100k)	23	56%*	8%*
	High (>\$100k)	24	70%*	11%*
Employment	Working FT / PT / Casual	41	75%	8%
	Retired	12	56%*	18%*
	Other	20	51%*	5%*
Solar	Solar PVs	18	79%*	0%*
	No Solar PVs	54	62%	13%
	Solar hot water	8	87%**	0%**
	Neither	47	58%	15%
Switched Energy Company or Plan	In the past 12 months	43	67%	9%
	1 to 5 years ago	29	64%*	10%*
	NETT switched (Last 5 yrs)	72	66%	10%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	27	63%*	16%*
	No	42	71%	6%
Actively Investigated Options	Yes	34	80%	8%
	No	38	53%	12%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	32	72%	8%
	Medium (\$300 to \$499)	17	55%*	22%*
	High (\$500+)	15	70%*	5%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	18	58%*	6%*
	Medium (\$200 to \$300)	29	76%*	8%*
	High (\$300+)	20	65%*	19%*
Customer Segments	Vulnerable Low Income	7	70%**	0%**
	Vulnerable Mid Income	3	66%**	0%**
	Vulnerable High Income	8	78%**	0%**
	Low Income Retired	5	59%**	20%**
	Average	16	58%*	6%*
	Secure Retired	7	54%**	17%**
	Secure High Income	26	73%*	14%*
Willingness To Take Risks	Low (0-4)	10	65%*	10%*
	Medium (5-7)	35	63%	8%
	High (8-10)	14	85%*	0%*
Technology Adopter	Innovator	5	100%**	0%**
	Early Adopter	12	69%*	22%*
	Early Majority	30	60%	0%
	Late Majority	10	71%*	9%*
	Laggard	2	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q17a. In the past 5 years, how many times have you changed the following? Q17b. And was that in the last 12 months?					
		(n=)	% Changed in past 12 months	% Changed in past 5 years	% Not Switched in Last 5 Years
Total		480	27%	49%	51%
Location	Metro	307	27%	47%	53%
	Regional	173	28%	53%	47%
Gas (Dual Fuel)	Yes	213	28%	48%	52%
	No (Electricity only)	244	28%	53%	47%
Age Group	18 - 34	144	24%	39%	61%
	35 - 54	198	28%	51%	49%
	55+	138	29%	58%	42%
Home Ownership	Owners	329	28%	50%	50%
	Renters / Other	151	26%	47%	53%
Household Income (Annual)	Low (<\$50k)	143	32%	55%	45%
	Medium (\$50k -<\$100k)	147	26%	47%	53%
	High (>\$100k)	130	25%	46%	54%
Employment	Working FT / PT / Casual	259	24%	45%	55%
	Retired	95	29%	60%	40%
	Other	132	31%	49%	51%
Solar	Solar PVs	99	29%	58%	42%
	No Solar PVs	381	27%	47%	53%
	Solar hot water	58	42%	68%	32%
	Neither	342	25%	46%	54%
Switched Energy Company or Plan	In the past 12 months	130	100%	100%	0%
	1 to 5 years ago	107	0%	100%	0%
	NETT switched (Last 5 yrs)	237	55%	100%	0%
	Have not switched at all	243	0%	0%	100%
Approached by Energy Company (Last 12 Months)	Yes	182	40%	64%	36%
	No	260	19%	41%	59%
Actively Investigated Options	Yes	150	54%	71%	29%
	No	317	15%	40%	60%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	33%	57%	43%
	Medium (\$300 to \$499)	143	25%	52%	48%
	High (\$500+)	116	26%	41%	59%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	23%	48%	52%
	Medium (\$200 to \$300)	56	39%	61%	39%
	High (\$300+)	65	28%	41%	59%
Customer Segments	Vulnerable Low Income	62	33%	53%	47%
	Vulnerable Mid Income	46	18%	47%	53%
	Vulnerable High Income	20	49%*	58%*	42%*
	Low Income Retired	46	21%	57%	43%
	Average	107	29%	47%	53%
	Secure Retired	46	37%	64%	36%
	Secure High Income	153	22%	41%	59%
Willingness To Take Risks	Low (0-4)	86	19%	43%	57%
	Medium (5-7)	218	30%	48%	52%
	High (8-10)	74	33%	49%	51%
Technology Adopter	Innovator	40	29%	35%	65%
	Early Adopter	79	36%	51%	49%
	Early Majority	173	26%	51%	49%
	Late Majority	60	29%	46%	54%
	Laggard	33	12%	30%	70%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?			
		(n=)	Yes
Total		480	39%
Location	Metro	307	37%
	Regional	173	41%
Gas (Dual Fuel)	Yes	213	44%
	No (Electricity only)	244	36%
Age Group	18 - 34	144	35%
	35 - 54	198	36%
	55+	138	45%
Home Ownership	Owners	329	39%
	Renters / Other	151	37%
Household Income (Annual)	Low (<\$50k)	143	41%
	Medium (\$50k -<\$100k)	147	41%
	High (>\$100k)	130	37%
Employment	Working FT / PT / Casual	259	36%
	Retired	95	44%
	Other	132	40%
Solar	Solar PVs	99	45%
	No Solar PVs	381	37%
	Solar hot water	58	51%
	Neither	342	36%
Switched Energy Company or Plan	In the past 12 months	130	57%
	1 to 5 years ago	107	42%
	NETT switched (Last 5 yrs)	237	50%
	Have not switched at all	243	27%
Approached by Energy Company (Last 12 Months)	Yes	182	100%
	No	260	0%
Actively Investigated Options	Yes	150	54%
	No	317	32%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	38%
	Medium (\$300 to \$499)	143	46%
	High (\$500+)	116	37%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	45%
	Medium (\$200 to \$300)	56	36%
	High (\$300+)	65	51%
Customer Segments	Vulnerable Low Income	62	48%
	Vulnerable Mid Income	46	44%
	Vulnerable High Income	20	54%*
	Low Income Retired	46	46%
	Average	107	34%
	Secure Retired	46	45%
	Secure High Income	153	29%
Willingness To Take Risks	Low (0-4)	86	29%
	Medium (5-7)	218	35%
	High (8-10)	74	45%
Technology Adopter	Innovator	40	44%
	Early Adopter	79	35%
	Early Majority	173	36%
	Late Majority	60	32%
	Laggard	33	28%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal.

		(n=)	Importance Rating (NETT 8+)						
			The price per kilowatt hour (kWh)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Availability of green energy plans	The solar feed-in tariff on offer
Total		230	73%	71%	51%	55%	80%	27%	32%
Location	Metro	140	67%	67%	48%	55%	76%	27%	30%
	Regional	90	84%	79%	58%	55%	88%	26%	35%
Gas (Dual Fuel)	Yes	97	73%	73%	50%	56%	81%	30%	38%
	No (Electricity only)	128	75%	71%	53%	55%	80%	23%	27%
Age Group	18 - 34	53	50%	64%	47%	55%	70%	37%	35%
	35 - 54	102	72%	70%	44%	51%	82%	29%	29%
	55+	75	90%	77%	62%	60%	85%	18%	33%
Home Ownership	Owners	159	75%	72%	52%	56%	80%	25%	36%
	Renters / Other	71	69%	70%	50%	52%	81%	32%	22%
Household Income (Annual)	Low (<\$50k)	76	76%	79%	64%	58%	87%	31%	37%
	Medium (\$50k -<\$100k)	70	77%	65%	45%	61%	77%	23%	27%
	High (>\$100k)	57	68%	70%	45%	48%	76%	25%	32%
Employment	Working FT / PT / Casual	115	66%	69%	44%	52%	79%	32%	34%
	Retired	52	91%	80%	62%	56%	81%	16%	36%
	Other	67	70%	70%	55%	60%	81%	28%	25%
Solar	Solar PVs	54	80%	82%	56%	51%	77%	32%	77%
	No Solar PVs	176	71%	68%	50%	56%	81%	25%	18%
	Solar hot water	38	71%	65%	53%	64%	75%	26%	52%
	Neither	155	74%	70%	52%	56%	81%	26%	17%
Switched Energy Company or Plan	In the past 12 months	127	73%	71%	55%	58%	81%	28%	31%
	1 to 5 years ago	103	75%	72%	47%	52%	79%	26%	34%
	NETT switched (Last 5 yrs)	230	73%	71%	51%	55%	80%	27%	32%
	Have not switched at all	0	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	115	74%	72%	56%	63%	78%	31%	35%
	No	102	73%	71%	46%	48%	81%	22%	31%
Actively Investigated Options	Yes	106	78%	75%	57%	61%	85%	31%	33%
	No	122	70%	69%	47%	51%	76%	23%	31%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	93	71%	68%	52%	56%	77%	32%	35%
	Medium (\$300 to \$499)	73	79%	76%	58%	58%	84%	24%	32%
	High (\$500+)	45	77%	76%	48%	63%	83%	19%	29%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	30	72%	74%	48%	56%	70%	28%	35%
	Medium (\$200 to \$300)	33	78%	66%	58%	67%	88%	33%	44%
	High (\$300+)	25	69%*	82%*	50%*	50%*	87%*	33%*	39%*
Customer Segments	Vulnerable Low Income	34	67%	74%	50%	66%	88%	35%	25%
	Vulnerable Mid Income	23	81%*	79%*	79%*	67%*	82%*	32%*	21%*
	Vulnerable High Income	11	46%*	65%*	65%*	74%*	55%*	64%*	55%*
	Low Income Retired	24	96%*	66%*	60%*	57%*	74%*	16%*	25%*
	Average	49	60%	63%	43%	46%	78%	26%	35%
	Secure Retired	27	86%*	92%*	63%*	53%*	86%*	14%*	44%*
	Secure High Income	62	73%	68%	37%	50%	82%	26%	29%
Willingness To Take Risks	Low (0-4)	36	86%	83%	63%	67%	89%	26%	32%
	Medium (5-7)	101	72%	66%	45%	48%	81%	20%	29%
	High (8-10)	34	72%	79%	71%	73%	82%	56%	49%
Technology Adopter	Innovator	13	83%*	78%*	62%*	62%*	66%*	54%*	57%*
	Early Adopter	39	62%	74%	58%	58%	72%	37%	45%
	Early Majority	86	81%	69%	59%	61%	88%	25%	26%
	Late Majority	26	66%*	60%*	30%*	50%*	85%*	13%*	19%*
	Laggard	10	77%*	100%*	41%*	28%*	100%*	18%*	59%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal. (Cont'd)

		(n=)	Importance Rating (NETT 8+)					
			Whether the price per kilowatt hour (kWh) can change during the contract	The ability to purchase or access energy storage batteries from the electricity company	The ability to purchase or access solar panels from the electricity company	The electricity company offering access to live data about your energy use and costs	The daily supply / service charge	The brand and reputation of the company
Total		230	63%	16%	22%	25%	65%	53%
Location	Metro	140	57%	18%	24%	28%	59%	49%
	Regional	90	72%	13%	18%	20%	74%	61%
Gas (Dual Fuel)	Yes	97	62%	26%	30%	30%	66%	56%
	No (Electricity only)	128	64%	8%	14%	20%	65%	52%
Age Group	18 - 34	53	50%	32%	42%	35%	51%	45%
	35 - 54	102	64%	14%	16%	29%	63%	48%
	55+	75	70%	8%	15%	14%	75%	63%
Home Ownership	Owners	159	64%	15%	22%	25%	66%	53%
	Renters / Other	71	61%	19%	22%	25%	61%	55%
Household Income (Annual)	Low (<\$50k)	76	71%	19%	22%	23%	75%	66%
	Medium (\$50k -<\$100k)	70	63%	17%	25%	20%	60%	44%
	High (>\$100k)	57	55%	11%	19%	30%	57%	48%
Employment	Working FT / PT / Casual	115	58%	17%	24%	30%	58%	48%
	Retired	52	73%	11%	14%	15%	78%	62%
	Other	67	61%	20%	25%	24%	62%	54%
Solar	Solar PVs	54	72%	24%	35%	21%	66%	54%
	No Solar PVs	176	60%	14%	18%	26%	64%	53%
	Solar hot water	38	68%	27%	41%	27%	61%	59%
	Neither	155	60%	12%	15%	26%	65%	53%
Switched Energy Company or Plan	In the past 12 months	127	61%	20%	24%	29%	67%	56%
	1 to 5 years ago	103	65%	12%	19%	20%	62%	50%
	NETT switched (Last 5 yrs)	230	63%	16%	22%	25%	65%	53%
	Have not switched at all	0	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	115	63%	16%	25%	21%	63%	57%
	No	102	63%	18%	20%	29%	66%	50%
Actively Investigated Options	Yes	106	65%	16%	19%	27%	72%	56%
	No	122	62%	17%	24%	24%	58%	52%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	93	64%	15%	21%	24%	69%	56%
	Medium (\$300 to \$499)	73	67%	16%	21%	27%	67%	60%
	High (\$500+)	45	61%	19%	30%	29%	61%	48%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	30	63%	28%	26%	30%	68%	57%
	Medium (\$200 to \$300)	33	58%	22%	19%	31%	69%	59%
	High (\$300+)	25	71%*	37%*	54%*	37%*	68%*	63%*
Customer Segments	Vulnerable Low Income	34	63%	21%	27%	26%	65%	66%
	Vulnerable Mid Income	23	89%*	18%*	18%*	28%*	81%*	40%*
	Vulnerable High Income	11	84%*	58%*	78%*	55%*	63%*	70%*
	Low Income Retired	24	65%*	11%*	11%*	14%*	83%*	68%*
	Average	49	44%	19%	22%	24%	51%	44%
	Secure Retired	27	80%*	8%*	14%*	12%*	72%*	55%*
Willingness To Take Risks	Secure High Income	62	55%	10%	20%	31%	58%	49%
	Low (0-4)	36	66%	14%	18%	32%	81%	69%
	Medium (5-7)	101	57%	14%	19%	22%	61%	54%
Technology Adopter	High (8-10)	34	72%	40%	52%	41%	78%	59%
	Innovator	13	74%*	56%*	49%*	44%*	52%*	62%*
	Early Adopter	39	57%	27%	40%	29%	66%	47%
	Early Majority	86	68%	17%	21%	26%	67%	61%
	Late Majority	26	39%*	3%*	10%*	15%*	73%*	49%*
	Laggard	10	69%*	0%*	20%*	36%*	90%*	91%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q54. Below is a range of factors that people might consider when changing their gas company, plan or deal. For each one please rate how important it was in your decision to switch your gas company or plan.										
		(n=)	Importance Rating (NETT 8+)							
			The price per megajoule (MJ)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Whether the price can change during the contract	The daily supply / service charge	The brand and reputation of the company
Total		72	71%	76%	64%	57%	86%	71%	71%	0%
Location	Metro	56	65%	69%	55%	51%	86%	66%	63%	0%
	Regional	16	94%*	100%*	94%*	79%*	88%*	88%*	100%*	0%*
Gas (Dual Fuel)	Yes	72	71%	76%	64%	57%	86%	71%	71%	0%
	No (Electricity only)	0	-	-	-	-	-	-	-	-
Age Group	18 - 34	21	66%*	80%*	65%*	60%*	81%*	62%*	70%*	0%*
	35 - 54	34	79%	75%	66%	52%	89%	70%	74%	0%
	55+	17	67%*	73%*	59%*	60%*	88%*	83%*	67%*	0%*
Home Ownership	Owners	54	73%	78%	61%	53%	85%	68%	70%	0%
	Renters / Other	18	66%*	69%*	72%*	68%*	90%*	79%*	72%*	0%*
Household Income (Annual)	Low (<\$50k)	20	81%*	76%*	75%*	65%*	89%*	82%*	77%*	0%*
	Medium (\$50k -<\$100k)	23	68%*	65%*	55%*	52%*	78%*	71%*	73%*	0%*
	High (>\$100k)	24	66%*	88%*	61%*	51%*	88%*	61%*	62%*	0%*
Employment	Working FT / PT / Casual	41	74%	85%	64%	56%	88%	66%	75%	0%
	Retired	12	72%*	72%*	60%*	62%*	94%*	83%*	72%*	0%*
	Other	20	67%*	62%*	67%*	58%*	77%*	74%*	64%*	0%*
Solar	Solar PVs	18	71%*	72%*	57%*	39%*	90%*	55%*	73%*	0%*
	No Solar PVs	54	72%	77%	66%	63%	85%	76%	70%	0%
	Solar hot water	8	59%**	69%**	69%**	69%**	59%**	76%**	69%**	0%**
	Neither	47	75%	79%	66%	62%	90%	77%	71%	0%
Switched Energy Company or Plan	In the past 12 months	43	71%	77%	73%	61%	87%	73%	74%	0%
	1 to 5 years ago	29	72%*	74%*	49%*	50%*	85%*	68%*	65%*	0%*
	NETT switched (Last 5 yrs)	72	71%	76%	64%	57%	86%	71%	71%	0%
	Have not switched at all	0	-	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	27	68%*	75%*	76%*	61%*	86%*	67%*	75%*	0%*
	No	42	77%	78%	58%	57%	86%	74%	68%	0%
Actively Investigated Options	Yes	34	85%	93%	88%	70%	91%	80%	82%	0%
	No	38	59%	60%	42%	45%	82%	63%	60%	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	32	65%	68%	67%	52%	83%	73%	70%	0%
	Medium (\$300 to \$499)	17	87%*	90%*	70%*	74%*	100%*	73%*	81%*	0%*
	High (\$500+)	15	64%*	70%*	50%*	46%*	74%*	60%*	58%*	0%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	18	69%*	65%*	58%*	49%*	83%*	72%*	71%*	0%*
	Medium (\$200 to \$300)	29	65%*	75%*	75%*	65%*	87%*	70%*	70%*	0%*
	High (\$300+)	20	85%*	85%*	59%*	57%*	89%*	73%*	74%*	0%*
Customer Segments	Vulnerable Low Income	7	87%**	61%**	87%**	74%**	100%**	61%**	74%**	0%**
	Vulnerable Mid Income	3	100%**	100%**	100%**	100%**	100%**	100%**	100%**	0%**
	Vulnerable High Income	8	78%**	78%**	78%**	78%**	78%**	54%**	65%**	0%**
	Low Income Retired	5	100%**	100%**	64%**	68%**	84%**	84%**	80%**	0%**
	Average	16	53%*	62%*	47%*	41%*	72%*	69%*	60%*	0%*
	Secure Retired	7	54%**	54%**	58%**	58%**	100%**	83%**	66%**	0%**
	Secure High Income	26	76%*	89%*	64%*	50%*	90%*	70%*	76%*	0%*
Willingness To Take Risks	Low (0-4)	10	76%*	62%*	57%*	57%*	67%*	83%*	76%*	0%*
	Medium (5-7)	35	60%	70%	56%	46%	88%	71%	66%	0%
	High (8-10)	14	88%*	95%*	95%*	81%*	82%*	71%*	81%*	0%*
Technology Adopter	Innovator	5	81%**	100%**	81%**	81%**	62%**	77%**	77%**	0%**
	Early Adopter	12	79%*	79%*	76%*	70%*	94%*	87%*	82%*	0%*
	Early Majority	30	67%	72%	67%	54%	83%	71%	75%	0%
	Late Majority	10	53%*	57%*	33%*	33%*	77%*	57%*	43%*	0%*
	Laggard	2	100%**	100%**	100%**	53%**	100%**	100%**	100%**	0%**

*Small sample size (n<30). **Extremely small sample size (n<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/ plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		480	29%	12%	48%
Location	Metro	307	27%	12%	51%
	Regional	173	35%	13%	44%
Gas (Dual Fuel)	Yes	213	26%	12%	55%
	No (Electricity only)	244	33%	12%	44%
Age Group	18 - 34	144	24%	10%	54%
	35 - 54	198	27%	12%	50%
	55+	138	37%	15%	41%
Home Ownership	Owners	329	28%	13%	50%
	Renters / Other	151	31%	10%	45%
Household Income (Annual)	Low (<\$50k)	143	33%	15%	41%
	Medium (\$50k -<\$100k)	147	29%	12%	53%
	High (>\$100k)	130	30%	7%	56%
Employment	Working FT / PT / Casual	259	25%	10%	57%
	Retired	95	39%	18%	36%
	Other	132	29%	12%	43%
Solar	Solar PVs	99	31%	13%	47%
	No Solar PVs	381	29%	12%	49%
	Solar hot water	58	31%	13%	46%
	Neither	342	29%	12%	49%
Switched Energy Company or Plan	In the past 12 months	130	26%	30%	41%
	1 to 5 years ago	107	25%	14%	56%
	NETT switched (Last 5 yrs)	237	25%	23%	48%
	Have not switched at all	243	33%	1%	49%
Approached by Energy Company (Last 12 Months)	Yes	182	30%	13%	52%
	No	260	29%	12%	46%
Actively Investigated Options	Yes	150	19%	15%	62%
	No	317	35%	11%	43%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	34%	13%	46%
	Medium (\$300 to \$499)	143	30%	15%	45%
	High (\$500+)	116	22%	8%	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	31%	8%	55%
	Medium (\$200 to \$300)	56	26%	16%	49%
	High (\$300+)	65	20%	10%	67%
Customer Segments	Vulnerable Low Income	62	25%	17%	45%
	Vulnerable Mid Income	46	22%	2%	71%
	Vulnerable High Income	20	5%*	9%*	86%*
	Low Income Retired	46	48%	15%	31%
	Average	107	34%	13%	34%
	Secure Retired	46	32%	22%	43%
	Secure High Income	153	26%	8%	56%
Willingness To Take Risks	Low (0-4)	86	32%	8%	42%
	Medium (5-7)	218	28%	14%	47%
	High (8-10)	74	17%	9%	64%
Technology Adopter	Innovator	40	10%	8%	66%
	Early Adopter	79	11%	15%	59%
	Early Majority	173	29%	11%	51%
	Late Majority	60	41%	15%	33%
	Laggard	33	52%	3%	18%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		480	73%
Location	Metro	307	75%
	Regional	173	71%
Gas (Dual Fuel)	Yes	213	73%
	No (Electricity only)	244	75%
Age Group	18 - 34	144	77%
	35 - 54	198	71%
	55+	138	73%
Home Ownership	Owners	329	76%
	Renters / Other	151	67%
Household Income (Annual)	Low (<\$50k)	143	77%
	Medium (\$50k -<\$100k)	147	76%
	High (>\$100k)	130	73%
Employment	Working FT / PT / Casual	259	75%
	Retired	95	76%
	Other	132	66%
Solar	Solar PVs	99	77%
	No Solar PVs	381	72%
	Solar hot water	58	87%
	Neither	342	71%
Switched Energy Company or Plan	In the past 12 months	130	74%
	1 to 5 years ago	107	78%
	NETT switched (Last 5 yrs)	237	76%
	Have not switched at all	243	71%
Approached by Energy Company (Last 12 Months)	Yes	182	73%
	No	260	75%
Actively Investigated Options	Yes	150	70%
	No	317	75%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	79%
	Medium (\$300 to \$499)	143	77%
	High (\$500+)	116	65%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	74%
	Medium (\$200 to \$300)	56	74%
	High (\$300+)	65	70%
Customer Segments	Vulnerable Low Income	62	72%
	Vulnerable Mid Income	46	57%
	Vulnerable High Income	20	92%*
	Low Income Retired	46	81%
	Average	107	68%
	Secure Retired	46	74%
	Secure High Income	153	78%
Willingness To Take Risks	Low (0-4)	86	75%
	Medium (5-7)	218	72%
	High (8-10)	74	80%
Technology Adopter	Innovator	40	91%
	Early Adopter	79	73%
	Early Majority	173	72%
	Late Majority	60	66%
	Laggard	33	72%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q7. How satisfied are you with your current gas company?			
		(n=)	Satisfied
Total		213	70%
Location	Metro	156	72%
	Regional	57	64%
Gas (Dual Fuel)	Yes	213	70%
	No (Electricity only)	0	-
Age Group	18 - 34	77	76%
	35 - 54	87	71%
	55+	49	62%
Home Ownership	Owners	159	74%
	Renters / Other	54	60%
Household Income (Annual)	Low (<\$50k)	48	64%
	Medium (\$50k -<\$100k)	76	71%
	High (>\$100k)	65	79%
Employment	Working FT / PT / Casual	130	72%
	Retired	32	69%
	Other	54	67%
Solar	Solar PVs	51	83%
	No Solar PVs	162	67%
	Solar hot water	21	86%*
	Neither	148	65%
Switched Energy Company or Plan	In the past 12 months	60	66%
	1 to 5 years ago	44	68%
	NETT switched (Last 5 yrs)	104	67%
	Have not switched at all	109	74%
Approached by Energy Company (Last 12 Months)	Yes	92	71%
	No	109	71%
Actively Investigated Options	Yes	67	68%
	No	142	71%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	68%
	Medium (\$300 to \$499)	63	74%
	High (\$500+)	50	71%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	70%
	Medium (\$200 to \$300)	56	75%
	High (\$300+)	65	69%
Customer Segments	Vulnerable Low Income	22	56%*
	Vulnerable Mid Income	17	59%*
	Vulnerable High Income	15	93%*
	Low Income Retired	16	71%*
	Average	45	70%
	Secure Retired	16	67%*
	Secure High Income	82	73%
Willingness To Take Risks	Low (0-4)	29	78%*
	Medium (5-7)	99	57%
	High (8-10)	46	89%
Technology Adopter	Innovator	24	83%*
	Early Adopter	41	73%
	Early Majority	76	60%
	Late Majority	22	61%*
	Laggard	11	100%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		480	71%
Location	Metro	307	73%
	Regional	173	68%
Gas (Dual Fuel)	Yes	213	70%
	No (Electricity only)	244	73%
Age Group	18 - 34	144	73%
	35 - 54	198	65%
	55+	138	75%
Home Ownership	Owners	329	74%
	Renters / Other	151	63%
Household Income (Annual)	Low (<\$50k)	143	75%
	Medium (\$50k -<\$100k)	147	71%
	High (>\$100k)	130	72%
Employment	Working FT / PT / Casual	259	70%
	Retired	95	77%
	Other	132	65%
Solar	Solar PVs	99	75%
	No Solar PVs	381	70%
	Solar hot water	58	82%
	Neither	342	69%
Switched Energy Company or Plan	In the past 12 months	130	75%
	1 to 5 years ago	107	75%
	NETT switched (Last 5 yrs)	237	75%
	Have not switched at all	243	67%
Approached by Energy Company (Last 12 Months)	Yes	182	73%
	No	260	71%
Actively Investigated Options	Yes	150	71%
	No	317	71%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	75%
	Medium (\$300 to \$499)	143	78%
	High (\$500+)	116	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	74%
	Medium (\$200 to \$300)	56	76%
	High (\$300+)	65	67%
Customer Segments	Vulnerable Low Income	62	62%
	Vulnerable Mid Income	46	64%
	Vulnerable High Income	20	94%*
	Low Income Retired	46	82%
	Average	107	72%
	Secure Retired	46	73%
	Secure High Income	153	68%
Willingness To Take Risks	Low (0-4)	86	71%
	Medium (5-7)	218	68%
	High (8-10)	74	86%
Technology Adopter	Innovator	40	84%
	Early Adopter	79	75%
	Early Majority	173	71%
	Late Majority	60	63%
	Laggard	33	61%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q8. How would you rate the overall quality of customer service provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		213	68%
Location	Metro	156	70%
	Regional	57	60%
Gas (Dual Fuel)	Yes	213	68%
	No (Electricity only)	0	-
Age Group	18 - 34	77	76%
	35 - 54	87	63%
	55+	49	61%
Home Ownership	Owners	159	70%
	Renters / Other	54	60%
Household Income (Annual)	Low (<\$50k)	48	66%
	Medium (\$50k -<\$100k)	76	70%
	High (>\$100k)	65	71%
Employment	Working FT / PT / Casual	130	70%
	Retired	32	69%
	Other	54	61%
Solar	Solar PVs	51	78%
	No Solar PVs	162	65%
	Solar hot water	21	79%*
	Neither	148	64%
Switched Energy Company or Plan	In the past 12 months	60	64%
	1 to 5 years ago	44	70%
	NETT switched (Last 5 yrs)	104	66%
	Have not switched at all	109	69%
Approached by Energy Company (Last 12 Months)	Yes	92	69%
	No	109	68%
Actively Investigated Options	Yes	67	67%
	No	142	68%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	68%
	Medium (\$300 to \$499)	63	71%
	High (\$500+)	50	65%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	66%
	Medium (\$200 to \$300)	56	72%
	High (\$300+)	65	71%
Customer Segments	Vulnerable Low Income	22	50%*
	Vulnerable Mid Income	17	65%*
	Vulnerable High Income	15	93%*
	Low Income Retired	16	81%*
	Average	45	68%
	Secure Retired	16	59%*
	Secure High Income	82	66%
Willingness To Take Risks	Low (0-4)	29	64%*
	Medium (5-7)	99	61%
	High (8-10)	46	90%
Technology Adopter	Innovator	24	89%*
	Early Adopter	41	74%
	Early Majority	76	63%
	Late Majority	22	56%*
	Laggard	11	82%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		480	64%
Location	Metro	307	66%
	Regional	173	60%
Gas (Dual Fuel)	Yes	213	66%
	No (Electricity only)	244	62%
Age Group	18 - 34	144	71%
	35 - 54	198	56%
	55+	138	65%
Home Ownership	Owners	329	67%
	Renters / Other	151	56%
Household Income (Annual)	Low (<\$50k)	143	66%
	Medium (\$50k -<\$100k)	147	63%
	High (>\$100k)	130	69%
Employment	Working FT / PT / Casual	259	66%
	Retired	95	70%
	Other	132	54%
Solar	Solar PVs	99	72%
	No Solar PVs	381	62%
	Solar hot water	58	74%
	Neither	342	60%
Switched Energy Company or Plan	In the past 12 months	130	70%
	1 to 5 years ago	107	59%
	NETT switched (Last 5 yrs)	237	65%
	Have not switched at all	243	63%
Approached by Energy Company (Last 12 Months)	Yes	182	66%
	No	260	64%
Actively Investigated Options	Yes	150	65%
	No	317	63%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	68%
	Medium (\$300 to \$499)	143	67%
	High (\$500+)	116	55%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	67%
	Medium (\$200 to \$300)	56	68%
	High (\$300+)	65	65%
Customer Segments	Vulnerable Low Income	62	46%
	Vulnerable Mid Income	46	43%
	Vulnerable High Income	20	86%*
	Low Income Retired	46	75%
	Average	107	60%
	Secure Retired	46	68%
	Secure High Income	153	71%
Willingness To Take Risks	Low (0-4)	86	60%
	Medium (5-7)	218	62%
	High (8-10)	74	81%
Technology Adopter	Innovator	40	82%
	Early Adopter	79	68%
	Early Majority	173	62%
	Late Majority	60	56%
	Laggard	33	68%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q9. How would you rate the overall value for money of the products and services provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		213	66%
Location	Metro	156	69%
	Regional	57	57%
Gas (Dual Fuel)	Yes	213	66%
	No (Electricity only)	0	-
Age Group	18 - 34	77	79%
	35 - 54	87	58%
	55+	49	59%
Home Ownership	Owners	159	72%
	Renters / Other	54	50%
Household Income (Annual)	Low (<\$50k)	48	66%
	Medium (\$50k -<\$100k)	76	65%
	High (>\$100k)	65	73%
Employment	Working FT / PT / Casual	130	68%
	Retired	32	65%
	Other	54	63%
Solar	Solar PVs	51	79%
	No Solar PVs	162	63%
	Solar hot water	21	91%*
	Neither	148	60%
Switched Energy Company or Plan	In the past 12 months	60	68%
	1 to 5 years ago	44	64%
	NETT switched (Last 5 yrs)	104	66%
	Have not switched at all	109	67%
Approached by Energy Company (Last 12 Months)	Yes	92	65%
	No	109	68%
Actively Investigated Options	Yes	67	69%
	No	142	65%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	65%
	Medium (\$300 to \$499)	63	64%
	High (\$500+)	50	70%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	59%
	Medium (\$200 to \$300)	56	74%
	High (\$300+)	65	69%
Customer Segments	Vulnerable Low Income	22	43%*
	Vulnerable Mid Income	17	58%*
	Vulnerable High Income	15	100%*
	Low Income Retired	16	73%*
	Average	45	68%
	Secure Retired	16	59%*
	Secure High Income	82	67%
Willingness To Take Risks	Low (0-4)	29	71%*
	Medium (5-7)	99	59%
	High (8-10)	46	89%
Technology Adopter	Innovator	24	78%*
	Early Adopter	41	75%
	Early Majority	76	63%
	Late Majority	22	51%*
	Laggard	11	100%*

*Small sample size (n<=30). **Extremely small sample size (n<=10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		480	62%	9%
Location	Metro	307	63%	8%
	Regional	173	61%	12%
Gas (Dual Fuel)	Yes	213	65%	12%
	No (Electricity only)	244	63%	8%
Age Group	18 - 34	144	67%	7%
	35 - 54	198	56%	9%
	55+	138	65%	12%
Home Ownership	Owners	329	66%	10%
	Renters / Other	151	55%	9%
Household Income (Annual)	Low (<\$50k)	143	70%	10%
	Medium (\$50k -<\$100k)	147	59%	10%
	High (>\$100k)	130	67%	8%
Employment	Working FT / PT / Casual	259	62%	8%
	Retired	95	70%	11%
	Other	132	55%	11%
Solar	Solar PVs	99	65%	9%
	No Solar PVs	381	62%	9%
	Solar hot water	58	71%	3%
	Neither	342	61%	10%
Switched Energy Company or Plan	In the past 12 months	130	71%	8%
	1 to 5 years ago	107	61%	11%
	NETT switched (Last 5 yrs)	237	66%	10%
	Have not switched at all	243	59%	9%
Approached by Energy Company (Last 12 Months)	Yes	182	64%	11%
	No	260	64%	8%
Actively Investigated Options	Yes	150	68%	13%
	No	317	61%	8%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	71%	7%
	Medium (\$300 to \$499)	143	65%	10%
	High (\$500+)	116	58%	12%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	64%	8%
	Medium (\$200 to \$300)	56	73%	11%
	High (\$300+)	65	67%	19%
Customer Segments	Vulnerable Low Income	62	63%	9%
	Vulnerable Mid Income	46	39%	16%
	Vulnerable High Income	20	81%*	5%*
	Low Income Retired	46	73%	5%
	Average	107	59%	7%
	Secure Retired	46	69%	16%
	Secure High Income	153	63%	8%
Willingness To Take Risks	Low (0-4)	86	57%	9%
	Medium (5-7)	218	61%	9%
	High (8-10)	74	83%	6%
Technology Adopter	Innovator	40	80%	2%
	Early Adopter	79	67%	10%
	Early Majority	173	63%	8%
	Late Majority	60	54%	11%
	Laggard	33	56%	8%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		230	83%	5%
Location	Metro	140	80%	7%
	Regional	90	88%	3%
Gas (Dual Fuel)	Yes	97	77%	11%
	No (Electricity only)	128	87%	1%
Age Group	18 - 34	53	72%	9%
	35 - 54	102	82%	6%
	55+	75	92%	1%
Home Ownership	Owners	159	84%	4%
	Renters / Other	71	80%	9%
Household Income (Annual)	Low (<\$50k)	76	86%	5%
	Medium (\$50k -<\$100k)	70	82%	7%
	High (>\$100k)	57	81%	4%
Employment	Working FT / PT / Casual	115	73%	9%
	Retired	52	96%	0%
	Other	67	88%	4%
Solar	Solar PVs	54	83%	6%
	No Solar PVs	176	83%	5%
	Solar hot water	38	89%	0%
	Neither	155	83%	6%
Switched Energy Company or Plan	In the past 12 months	127	81%	7%
	1 to 5 years ago	103	86%	4%
	NETT switched (Last 5 yrs)	230	83%	5%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	115	81%	5%
	No	102	87%	4%
Actively Investigated Options	Yes	106	83%	5%
	No	122	83%	6%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	93	87%	4%
	Medium (\$300 to \$499)	73	86%	4%
	High (\$500+)	45	78%	7%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	30	76%	9%
	Medium (\$200 to \$300)	33	90%	7%
	High (\$300+)	25	67%*	19%*
Customer Segments	Vulnerable Low Income	34	81%	5%
	Vulnerable Mid Income	23	76%*	16%*
	Vulnerable High Income	11	65%*	10%*
	Low Income Retired	24	92%*	0%*
	Average	49	83%	9%
	Secure Retired	27	100%*	0%*
	Secure High Income	62	76%	3%
Willingness To Take Risks	Low (0-4)	36	90%	4%
	Medium (5-7)	101	79%	4%
	High (8-10)	34	82%	10%
Technology Adopter	Innovator	13	76%*	9%*
	Early Adopter	39	74%	8%
	Early Majority	86	88%	4%
	Late Majority	26	70%*	3%*
	Laggard	10	100%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		230	81%	8%
Location	Metro	140	80%	7%
	Regional	90	83%	10%
Gas (Dual Fuel)	Yes	97	77%	14%
	No (Electricity only)	128	84%	4%
Age Group	18 - 34	53	76%	11%
	35 - 54	102	76%	12%
	55+	75	88%	3%
Home Ownership	Owners	159	83%	7%
	Renters / Other	71	74%	12%
Household Income (Annual)	Low (<\$50k)	76	87%	7%
	Medium (\$50k -<\$100k)	70	76%	8%
	High (>\$100k)	57	82%	7%
Employment	Working FT / PT / Casual	115	74%	9%
	Retired	52	94%	2%
	Other	67	80%	11%
Solar	Solar PVs	54	83%	10%
	No Solar PVs	176	80%	8%
	Solar hot water	38	81%	1%
	Neither	155	80%	9%
Switched Energy Company or Plan	In the past 12 months	127	77%	10%
	1 to 5 years ago	103	85%	6%
	NETT switched (Last 5 yrs)	230	81%	8%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	115	82%	9%
	No	102	83%	5%
Actively Investigated Options	Yes	106	80%	9%
	No	122	82%	7%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	93	87%	7%
	Medium (\$300 to \$499)	73	79%	7%
	High (\$500+)	45	80%	9%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	30	83%	13%
	Medium (\$200 to \$300)	33	83%	9%
	High (\$300+)	25	65%*	21%*
Customer Segments	Vulnerable Low Income	34	81%	12%
	Vulnerable Mid Income	23	66%*	25%*
	Vulnerable High Income	11	75%*	15%*
	Low Income Retired	24	96%*	4%*
	Average	49	76%	8%
	Secure Retired	27	92%*	0%*
	Secure High Income	62	77%	6%
Willingness To Take Risks	Low (0-4)	36	86%	7%
	Medium (5-7)	101	79%	7%
	High (8-10)	34	70%	19%
Technology Adopter	Innovator	13	76%*	10%*
	Early Adopter	39	75%	12%
	Early Majority	86	82%	9%
	Late Majority	26	68%*	8%*
	Laggard	10	90%*	10%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		72	77%	12%
Location	Metro	56	78%	11%
	Regional	16	74%*	18%*
Gas (Dual Fuel)	Yes	72	77%	12%
	No (Electricity only)	0	-	-
Age Group	18 - 34	21	80%*	5%*
	35 - 54	34	79%	16%
	55+	17	71%*	16%*
Home Ownership	Owners	54	81%	11%
	Renters / Other	18	65%*	17%*
Household Income (Annual)	Low (<\$50k)	20	69%*	18%*
	Medium (\$50k -<\$100k)	23	77%*	8%*
	High (>\$100k)	24	83%*	14%*
Employment	Working FT / PT / Casual	41	74%	10%
	Retired	12	85%*	15%*
	Other	20	78%*	15%*
Solar	Solar PVs	18	84%*	11%*
	No Solar PVs	54	75%	13%
	Solar hot water	8	69%**	0%**
	Neither	47	76%	15%
Switched Energy Company or Plan	In the past 12 months	43	76%	11%
	1 to 5 years ago	29	78%*	15%*
	NETT switched (Last 5 yrs)	72	77%	12%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	27	75%*	13%*
	No	42	80%	10%
Actively Investigated Options	Yes	34	78%	12%
	No	38	76%	13%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	32	80%	16%
	Medium (\$300 to \$499)	17	83%*	10%*
	High (\$500+)	15	73%*	7%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	18	68%*	28%*
	Medium (\$200 to \$300)	29	91%*	4%*
	High (\$300+)	20	70%*	8%*
Customer Segments	Vulnerable Low Income	7	87%**	13%**
	Vulnerable Mid Income	3	61%**	39%**
	Vulnerable High Income	8	73%**	13%**
	Low Income Retired	5	62%**	38%**
	Average	16	73%*	12%*
	Secure Retired	7	100%**	0%**
	Secure High Income	26	76%*	7%*
Willingness To Take Risks	Low (0-4)	10	57%*	29%*
	Medium (5-7)	35	80%	5%
	High (8-10)	14	77%*	17%*
Technology Adopter	Innovator	5	81%**	19%**
	Early Adopter	12	75%*	9%*
	Early Majority	30	78%	12%
	Late Majority	10	60%*	16%*
	Laggard	2	100%**	0%**

*Small sample size (n<30). **Extremely small sample size (n<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		72	77%	9%
Location	Metro	56	76%	8%
	Regional	16	80%*	12%*
Gas (Dual Fuel)	Yes	72	77%	9%
	No (Electricity only)	0	-	-
Age Group	18 - 34	21	80%*	5%*
	35 - 54	34	85%	10%
	55+	17	63%*	11%*
Home Ownership	Owners	54	80%	7%
	Renters / Other	18	69%*	13%*
Household Income (Annual)	Low (<\$50k)	20	72%*	11%*
	Medium (\$50k -<\$100k)	23	77%*	8%*
	High (>\$100k)	24	87%*	9%*
Employment	Working FT / PT / Casual	41	77%	7%
	Retired	12	74%*	8%*
	Other	20	81%*	11%*
Solar	Solar PVs	18	83%*	0%*
	No Solar PVs	54	75%	11%
	Solar hot water	8	82%**	0%**
	Neither	47	75%	13%
Switched Energy Company or Plan	In the past 12 months	43	76%	9%
	1 to 5 years ago	29	80%*	8%*
	NETT switched (Last 5 yrs)	72	77%	9%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	27	73%*	10%*
	No	42	84%	6%
Actively Investigated Options	Yes	34	75%	12%
	No	38	79%	6%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	32	78%	11%
	Medium (\$300 to \$499)	17	89%*	3%*
	High (\$500+)	15	70%*	7%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	18	63%*	19%*
	Medium (\$200 to \$300)	29	91%*	0%*
	High (\$300+)	20	76%*	8%*
Customer Segments	Vulnerable Low Income	7	100%**	0%**
	Vulnerable Mid Income	3	61%**	39%**
	Vulnerable High Income	8	87%**	13%**
	Low Income Retired	5	78%**	22%**
	Average	16	79%*	6%*
	Secure Retired	7	71%**	0%**
	Secure High Income	26	71%*	7%*
Willingness To Take Risks	Low (0-4)	10	66%*	20%*
	Medium (5-7)	35	78%	3%
	High (8-10)	14	69%*	17%*
Technology Adopter	Innovator	5	100%**	0%**
	Early Adopter	12	66%*	9%*
	Early Majority	30	78%	12%
	Late Majority	10	53%*	9%*
	Laggard	2	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		480	62%
Location	Metro	307	61%
	Regional	173	64%
Gas (Dual Fuel)	Yes	213	62%
	No (Electricity only)	244	63%
Age Group	18 - 34	144	63%
	35 - 54	198	56%
	55+	138	67%
Home Ownership	Owners	329	65%
	Renters / Other	151	55%
Household Income (Annual)	Low (<\$50k)	143	66%
	Medium (\$50k -<\$100k)	147	59%
	High (>\$100k)	130	64%
Employment	Working FT / PT / Casual	259	61%
	Retired	95	72%
	Other	132	54%
Solar	Solar PVs	99	73%
	No Solar PVs	381	59%
	Solar hot water	58	69%
	Neither	342	60%
Switched Energy Company or Plan	In the past 12 months	130	70%
	1 to 5 years ago	107	66%
	NETT switched (Last 5 yrs)	237	68%
	Have not switched at all	243	56%
Approached by Energy Company (Last 12 Months)	Yes	182	65%
	No	260	63%
Actively Investigated Options	Yes	150	75%
	No	317	56%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	69%
	Medium (\$300 to \$499)	143	61%
	High (\$500+)	116	57%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	56%
	Medium (\$200 to \$300)	56	71%
	High (\$300+)	65	65%
Customer Segments	Vulnerable Low Income	62	54%
	Vulnerable Mid Income	46	45%
	Vulnerable High Income	20	84%*
	Low Income Retired	46	75%
	Average	107	58%
	Secure Retired	46	72%
	Secure High Income	153	62%
Willingness To Take Risks	Low (0-4)	86	55%
	Medium (5-7)	218	60%
	High (8-10)	74	90%
Technology Adopter	Innovator	40	78%
	Early Adopter	79	70%
	Early Majority	173	62%
	Late Majority	60	54%
	Laggard	33	60%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		480	62%
Location	Metro	307	64%
	Regional	173	58%
Gas (Dual Fuel)	Yes	213	66%
	No (Electricity only)	244	61%
Age Group	18 - 34	144	62%
	35 - 54	198	56%
	55+	138	69%
Home Ownership	Owners	329	66%
	Renters / Other	151	54%
Household Income (Annual)	Low (<\$50k)	143	64%
	Medium (\$50k -<\$100k)	147	60%
	High (>\$100k)	130	67%
Employment	Working FT / PT / Casual	259	61%
	Retired	95	74%
	Other	132	53%
Solar	Solar PVs	99	72%
	No Solar PVs	381	60%
	Solar hot water	58	72%
	Neither	342	59%
Switched Energy Company or Plan	In the past 12 months	130	73%
	1 to 5 years ago	107	59%
	NETT switched (Last 5 yrs)	237	67%
	Have not switched at all	243	58%
Approached by Energy Company (Last 12 Months)	Yes	182	64%
	No	260	64%
Actively Investigated Options	Yes	150	75%
	No	317	56%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	67%
	Medium (\$300 to \$499)	143	64%
	High (\$500+)	116	57%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	64%
	Medium (\$200 to \$300)	56	75%
	High (\$300+)	65	61%
Customer Segments	Vulnerable Low Income	62	48%
	Vulnerable Mid Income	46	30%
	Vulnerable High Income	20	84%*
	Low Income Retired	46	74%
	Average	107	61%
	Secure Retired	46	78%
	Secure High Income	153	65%
Willingness To Take Risks	Low (0-4)	86	53%
	Medium (5-7)	218	60%
	High (8-10)	74	86%
Technology Adopter	Innovator	40	76%
	Early Adopter	79	70%
	Early Majority	173	62%
	Late Majority	60	51%
	Laggard	33	59%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		480	79%	65%	46%	48%	47%	38%	39%
Location	Metro	307	77%	66%	48%	50%	50%	42%	43%
	Regional	173	82%	65%	44%	44%	42%	31%	32%
Gas (Dual Fuel)	Yes	213	76%	68%	51%	54%	51%	45%	46%
	No (Electricity only)	244	84%	65%	44%	44%	45%	33%	33%
Age Group	18 - 34	144	73%	62%	50%	47%	60%	42%	49%
	35 - 54	198	76%	69%	48%	53%	51%	41%	45%
	55+	138	88%	64%	41%	44%	30%	32%	24%
Home Ownership	Owners	329	81%	67%	47%	47%	46%	42%	40%
	Renters / Other	151	75%	62%	46%	49%	49%	31%	38%
Household Income (Annual)	Low (<\$50k)	143	82%	69%	47%	48%	40%	33%	28%
	Medium (\$50k -<\$100k)	147	78%	65%	51%	54%	52%	43%	47%
	High (>\$100k)	130	85%	70%	42%	49%	51%	42%	47%
Employment	Working FT / PT / Casual	259	79%	68%	50%	51%	57%	47%	51%
	Retired	95	87%	61%	43%	43%	24%	24%	15%
	Other	132	73%	62%	44%	48%	50%	34%	40%
Solar	Solar PVs	99	84%	70%	47%	45%	45%	40%	37%
	No Solar PVs	381	78%	64%	46%	49%	48%	38%	40%
	Solar hot water	58	77%	68%	47%	40%	42%	39%	28%
	Neither	342	80%	65%	46%	50%	48%	38%	41%
Switched Energy Company or Plan	In the past 12 months	130	85%	61%	41%	40%	35%	28%	27%
	1 to 5 years ago	107	87%	68%	47%	42%	50%	32%	35%
	NETT switched (Last 5 yrs)	237	86%	64%	44%	41%	42%	30%	30%
	Have not switched at all	243	72%	66%	49%	55%	52%	47%	48%
Approached by Energy Company (Last 12 Months)	Yes	182	86%	70%	51%	52%	48%	43%	43%
	No	260	75%	62%	44%	45%	48%	36%	37%
Actively Investigated Options	Yes	150	86%	62%	40%	42%	36%	27%	26%
	No	317	77%	69%	50%	52%	52%	44%	46%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	83%	65%	44%	46%	42%	42%	35%
	Medium (\$300 to \$499)	143	82%	69%	44%	48%	52%	34%	37%
	High (\$500+)	116	77%	72%	55%	57%	50%	41%	50%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	78%	67%	55%	57%	49%	44%	49%
	Medium (\$200 to \$300)	56	76%	72%	42%	55%	48%	50%	47%
	High (\$300+)	65	79%	75%	58%	57%	53%	47%	39%
Customer Segments	Vulnerable Low Income	62	81%	77%	57%	56%	50%	35%	40%
	Vulnerable Mid Income	46	82%	79%	55%	54%	63%	43%	51%
	Vulnerable High Income	20	86%*	94%*	79%*	67%*	78%*	67%*	56%*
	Low Income Retired	46	88%	53%	37%	43%	26%	28%	19%
	Average	107	69%	57%	35%	45%	43%	35%	43%
	Secure Retired	46	88%	69%	48%	42%	21%	20%	9%
Willingness To Take Risks	Secure High Income	153	77%	62%	46%	46%	57%	47%	49%
	Low (0-4)	86	72%	62%	44%	57%	42%	41%	40%
	Medium (5-7)	218	77%	60%	42%	43%	40%	34%	36%
Technology Adopter	High (8-10)	74	80%	73%	46%	38%	52%	39%	33%
	Innovator	40	75%	65%	61%	46%	64%	53%	33%
	Early Adopter	79	78%	64%	44%	42%	47%	42%	39%
	Early Majority	173	80%	64%	37%	46%	35%	30%	37%
	Late Majority	60	68%	58%	48%	53%	44%	41%	32%
	Laggard	33	66%	57%	36%	32%	41%	27%	36%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		480	3%	14%	20%	28%	24%	35%	33%
Location	Metro	307	2%	14%	20%	24%	23%	32%	28%
	Regional	173	3%	14%	20%	36%	26%	41%	41%
Gas (Dual Fuel)	Yes	213	3%	12%	21%	26%	26%	32%	30%
	No (Electricity only)	244	2%	15%	20%	32%	24%	39%	38%
Age Group	18 - 34	144	3%	12%	14%	22%	13%	25%	23%
	35 - 54	198	4%	11%	20%	23%	23%	33%	26%
	55+	138	1%	18%	25%	40%	37%	47%	50%
Home Ownership	Owners	329	2%	13%	21%	31%	26%	35%	34%
	Renters / Other	151	3%	16%	19%	22%	20%	35%	29%
Household Income (Annual)	Low (<\$50k)	143	2%	17%	22%	34%	31%	44%	45%
	Medium (\$50k -<\$100k)	147	3%	14%	16%	27%	23%	32%	27%
	High (>\$100k)	130	2%	9%	24%	29%	19%	31%	32%
Employment	Working FT / PT / Casual	259	3%	12%	19%	23%	18%	23%	23%
	Retired	95	2%	19%	28%	42%	40%	52%	58%
	Other	132	2%	12%	16%	27%	23%	36%	29%
Solar	Solar PVs	99	2%	12%	22%	32%	30%	38%	38%
	No Solar PVs	381	3%	14%	19%	27%	23%	34%	31%
	Solar hot water	58	3%	7%	16%	38%	29%	27%	38%
	Neither	342	3%	14%	21%	27%	24%	36%	32%
Switched Energy Company or Plan	In the past 12 months	130	4%	21%	31%	43%	37%	50%	51%
	1 to 5 years ago	107	1%	16%	22%	31%	24%	45%	38%
	NETT switched (Last 5 yrs)	237	3%	19%	27%	37%	32%	48%	45%
	Have not switched at all	243	2%	9%	13%	19%	17%	22%	21%
Approached by Energy Company (Last 12 Months)	Yes	182	3%	14%	23%	29%	28%	38%	34%
	No	260	3%	13%	20%	29%	22%	35%	33%
Actively Investigated Options	Yes	150	1%	20%	30%	44%	36%	54%	53%
	No	317	3%	10%	16%	22%	20%	27%	23%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	168	1%	19%	22%	35%	29%	38%	36%
	Medium (\$300 to \$499)	143	1%	13%	28%	30%	25%	41%	37%
	High (\$500+)	116	5%	8%	11%	21%	21%	31%	30%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	69	4%	16%	24%	25%	30%	38%	30%
	Medium (\$200 to \$300)	56	0%	9%	24%	29%	25%	35%	30%
	High (\$300+)	65	4%	12%	17%	22%	29%	30%	36%
Customer Segments	Vulnerable Low Income	62	4%	11%	17%	24%	29%	40%	34%
	Vulnerable Mid Income	46	5%	14%	15%	22%	17%	29%	18%
	Vulnerable High Income	20	10%*	0%*	10%*	24%*	13%*	18%*	26%*
	Low Income Retired	46	2%	20%	27%	37%	29%	44%	41%
	Average	107	1%	16%	17%	26%	26%	33%	28%
	Secure Retired	46	0%	20%	30%	49%	53%	61%	78%
Willingness To Take Risks	Secure High Income	153	3%	10%	20%	24%	13%	26%	21%
	Low (0-4)	86	2%	15%	20%	19%	30%	34%	26%
	Medium (5-7)	218	2%	14%	14%	29%	24%	33%	35%
Technology Adopter	High (8-10)	74	1%	6%	26%	28%	22%	32%	32%
	Innovator	40	0%	11%	22%	30%	11%	28%	35%
	Early Adopter	79	2%	13%	19%	28%	24%	32%	35%
	Early Majority	173	1%	11%	19%	26%	29%	37%	31%
	Late Majority	60	3%	16%	12%	23%	28%	31%	33%
	Laggard	33	4%	19%	17%	27%	17%	21%	27%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Appendix Six: Australian Capital Territory Tables

NB: Tables with total base size of n=<30 are not displayed.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		200	73%
Location	Metro	200	73%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	72%
	No (Electricity only)	64	76%
Age Group	18 - 34	34	77%
	35 - 54	71	61%
	55+	95	77%
Home Ownership	Owners	153	75%
	Renters / Other	47	64%
Household Income (Annual)	Low (<\$50k)	32	70%
	Medium (\$50k -<\$100k)	75	73%
	High (>\$100k)	69	78%
Employment	Working FT / PT / Casual	104	69%
	Retired	68	79%
	Other	29	63%*
Solar	Solar PVs	44	83%
	No Solar PVs	156	69%
	Solar hot water	23	78%*
	Neither	145	69%
Switched Energy Company or Plan	In the past 12 months	36	91%
	1 to 5 years ago	27	98%*
	NETT switched (Last 5 yrs)	63	93%
	Have not switched at all	137	63%
Approached by Energy Company (Last 12 Months)	Yes	50	94%
	No	132	68%
Actively Investigated Options	Yes	45	88%
	No	151	68%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	68%
	Medium (\$300 to \$499)	44	81%
	High (\$500+)	55	81%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	71%
	Medium (\$200 to \$300)	16	78%*
	High (\$300+)	58	74%
Customer Segments	Vulnerable Low Income	12	69%*
	Vulnerable Mid Income	9	45%**
	Vulnerable High Income	3	39%**
	Low Income Retired	21	78%*
	Average	30	80%
	Secure Retired	45	81%
	Secure High Income	80	67%
Willingness To Take Risks	Low (0-4)	35	67%
	Medium (5-7)	76	74%
	High (8-10)	28	80%*
Technology Adopter	Innovator	4	85%**
	Early Adopter	24	74%*
	Early Majority	68	77%
	Late Majority	32	69%
	Laggard	12	55%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q13. Please tell me whether you think the following statements are True or False. b) Consumers in your state [territory] can choose their gas company.			
		(n=)	True
Total		131	47%
Location	Metro	131	47%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	47%
	No (Electricity only)	0	-
Age Group	18 - 34	21	72%*
	35 - 54	44	36%
	55+	66	45%
Home Ownership	Owners	110	46%
	Renters / Other	21	55%*
Household Income (Annual)	Low (<\$50k)	20	46%*
	Medium (\$50k -<\$100k)	49	49%
	High (>\$100k)	48	48%
Employment	Working FT / PT / Casual	67	50%
	Retired	48	43%
	Other	16	46%*
Solar	Solar PVs	32	55%
	No Solar PVs	99	44%
	Solar hot water	16	44%*
	Neither	91	44%
Switched Energy Company or Plan	In the past 12 months	26	60%*
	1 to 5 years ago	18	82%*
	NETT switched (Last 5 yrs)	44	69%
	Have not switched at all	87	36%
Approached by Energy Company (Last 12 Months)	Yes	33	54%
	No	84	44%
Actively Investigated Options	Yes	26	50%*
	No	101	46%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	39%
	Medium (\$300 to \$499)	30	67%
	High (\$500+)	30	44%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	51%
	Medium (\$200 to \$300)	16	29%*
	High (\$300+)	58	53%
Customer Segments	Vulnerable Low Income	5	37%**
	Vulnerable Mid Income	8	29%**
	Vulnerable High Income	3	39%**
	Low Income Retired	13	40%*
	Average	19	59%*
	Secure Retired	34	46%
	Secure High Income	49	50%
Willingness To Take Risks	Low (0-4)	25	59%*
	Medium (5-7)	51	47%
	High (8-10)	19	60%*
Technology Adopter	Innovator	3	64%**
	Early Adopter	18	42%*
	Early Majority	45	58%
	Late Majority	20	48%*
	Laggard	9	57%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		200	61%
Location	Metro	200	61%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	60%
	No (Electricity only)	64	63%
Age Group	18 - 34	34	62%
	35 - 54	71	53%
	55+	95	64%
Home Ownership	Owners	153	59%
	Renters / Other	47	67%
Household Income (Annual)	Low (<\$50k)	32	63%
	Medium (\$50k -<\$100k)	75	61%
	High (>\$100k)	69	68%
Employment	Working FT / PT / Casual	104	58%
	Retired	68	64%
	Other	29	58%*
Solar	Solar PVs	44	65%
	No Solar PVs	156	59%
	Solar hot water	23	62%*
	Neither	145	60%
Switched Energy Company or Plan	In the past 12 months	36	83%
	1 to 5 years ago	27	54%*
	NETT switched (Last 5 yrs)	63	72%
	Have not switched at all	137	56%
Approached by Energy Company (Last 12 Months)	Yes	50	75%
	No	132	58%
Actively Investigated Options	Yes	45	75%
	No	151	56%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	60%
	Medium (\$300 to \$499)	44	70%
	High (\$500+)	55	65%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	59%
	Medium (\$200 to \$300)	16	58%*
	High (\$300+)	58	63%
Customer Segments	Vulnerable Low Income	12	50%*
	Vulnerable Mid Income	9	48%**
	Vulnerable High Income	3	63%**
	Low Income Retired	21	62%*
	Average	30	68%
	Secure Retired	45	68%
	Secure High Income	80	56%
Willingness To Take Risks	Low (0-4)	35	61%
	Medium (5-7)	76	63%
	High (8-10)	28	55%*
Technology Adopter	Innovator	4	55%**
	Early Adopter	24	73%*
	Early Majority	68	55%
	Late Majority	32	67%
	Laggard	12	46%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.

		(n=)	True
Total		131	37%
Location	Metro	131	37%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	37%
	No (Electricity only)	0	-
Age Group	18 - 34	21	58%*
	35 - 54	44	37%
	55+	66	32%
Home Ownership	Owners	110	34%
	Renters / Other	21	56%*
Household Income (Annual)	Low (<\$50k)	20	49%*
	Medium (\$50k -<\$100k)	49	37%
	High (>\$100k)	48	37%
Employment	Working FT / PT / Casual	67	39%
	Retired	48	34%
	Other	16	43%*
Solar	Solar PVs	32	34%
	No Solar PVs	99	38%
	Solar hot water	16	37%*
	Neither	91	38%
Switched Energy Company or Plan	In the past 12 months	26	52%*
	1 to 5 years ago	18	57%*
	NETT switched (Last 5 yrs)	44	54%
	Have not switched at all	87	29%
Approached by Energy Company (Last 12 Months)	Yes	33	38%
	No	84	38%
Actively Investigated Options	Yes	26	40%*
	No	101	35%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	29%
	Medium (\$300 to \$499)	30	59%
	High (\$500+)	30	33%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	28%
	Medium (\$200 to \$300)	16	35%*
	High (\$300+)	58	43%
Customer Segments	Vulnerable Low Income	5	37%**
	Vulnerable Mid Income	8	13%**
	Vulnerable High Income	3	63%**
	Low Income Retired	13	32%*
	Average	19	59%*
	Secure Retired	34	35%
	Secure High Income	49	35%
Willingness To Take Risks	Low (0-4)	25	44%*
	Medium (5-7)	51	37%
	High (8-10)	19	50%*
Technology Adopter	Innovator	3	64%**
	Early Adopter	18	63%*
	Early Majority	45	32%
	Late Majority	20	41%*
	Laggard	9	33%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?			
		(n=)	Yes
Total		200	23%
Location	Metro	200	23%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	20%
	No (Electricity only)	64	29%
Age Group	18 - 34	34	21%
	35 - 54	71	21%
	55+	95	24%
Home Ownership	Owners	153	27%
	Renters / Other	47	9%
Household Income (Annual)	Low (<\$50k)	32	11%
	Medium (\$50k -<\$100k)	75	27%
	High (>\$100k)	69	27%
Employment	Working FT / PT / Casual	104	22%
	Retired	68	21%
	Other	29	29%*
Solar	Solar PVs	44	29%
	No Solar PVs	156	21%
	Solar hot water	23	17%*
	Neither	145	23%
Switched Energy Company or Plan	In the past 12 months	36	54%
	1 to 5 years ago	27	23%*
	NETT switched (Last 5 yrs)	63	41%
	Have not switched at all	137	14%
Approached by Energy Company (Last 12 Months)	Yes	50	44%
	No	132	17%
Actively Investigated Options	Yes	45	100%
	No	151	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	15%
	Medium (\$300 to \$499)	44	29%
	High (\$500+)	55	34%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	16%
	Medium (\$200 to \$300)	16	33%*
	High (\$300+)	58	24%
Customer Segments	Vulnerable Low Income	12	15%*
	Vulnerable Mid Income	9	33%**
	Vulnerable High Income	3	0%**
	Low Income Retired	21	16%*
	Average	30	42%
	Secure Retired	45	22%
	Secure High Income	80	18%
Willingness To Take Risks	Low (0-4)	35	13%
	Medium (5-7)	76	23%
	High (8-10)	28	31%*
Technology Adopter	Innovator	4	15%**
	Early Adopter	24	29%*
	Early Majority	68	25%
	Late Majority	32	20%
	Laggard	12	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q51. The last time you switched your electricity company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		63	42%	31%
Location	Metro	63	42%	31%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	44	45%	26%
	No (Electricity only)	19	36%*	43%*
Age Group	18 - 34	10	50%*	40%*
	35 - 54	26	46%*	32%*
	55+	27	38%*	27%*
Home Ownership	Owners	51	35%	33%
	Renters / Other	12	80%*	20%*
Household Income (Annual)	Low (<\$50k)	9	53%**	11%**
	Medium (\$50k -<\$100k)	20	37%*	42%*
	High (>\$100k)	25	50%*	35%*
Employment	Working FT / PT / Casual	31	53%	40%
	Retired	21	29%*	24%*
	Other	11	45%*	19%*
Solar	Solar PVs	16	49%*	18%*
	No Solar PVs	47	40%	36%
	Solar hot water	8	25%**	37%**
	Neither	44	42%	34%
Switched Energy Company or Plan	In the past 12 months	36	49%	23%
	1 to 5 years ago	27	32%*	42%*
	NETT switched (Last 5 yrs)	63	42%	31%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	26	41%*	32%*
	No	32	44%	32%
Actively Investigated Options	Yes	25	48%*	41%*
	No	36	40%	22%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	16	24%*	24%*
	Medium (\$300 to \$499)	20	57%*	38%*
	High (\$500+)	19	49%*	37%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	10	71%*	10%*
	Medium (\$200 to \$300)	4	20%**	51%**
	High (\$300+)	21	41%*	37%*
Customer Segments	Vulnerable Low Income	5	56%**	22%**
	Vulnerable Mid Income	1	0%**	100%**
	Vulnerable High Income	2	62%**	38%**
	Low Income Retired	4	25%**	25%**
	Average	12	32%*	37%*
	Secure Retired	16	31%*	20%*
	Secure High Income	23	61%*	34%*
Willingness To Take Risks	Low (0-4)	7	41%**	13%**
	Medium (5-7)	24	44%*	31%*
	High (8-10)	9	54%**	31%**
Technology Adopter	Innovator	0	-	-
	Early Adopter	8	59%**	15%**
	Early Majority	23	45%*	27%*
	Late Majority	8	41%**	31%**
	Laggard	1	0%**	100%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q17a. In the past 5 years, how many times have you changed the following? Q17b. And was that in the last 12 months?					
		(n=)	% Changed in past 12 months	% Changed in past 5 years	% Not Switched in Last 5 Years
Total		200	19%	32%	68%
Location	Metro	200	19%	32%	68%
	Regional	0	-	-	-
Gas (Dual Fuel)	Yes	131	20%	34%	66%
	No (Electricity only)	64	16%	29%	71%
Age Group	18 - 34	34	21%	30%	70%
	35 - 54	71	18%	37%	63%
	55+	95	19%	29%	71%
Home Ownership	Owners	153	20%	34%	66%
	Renters / Other	47	12%	24%	76%
Household Income (Annual)	Low (<\$50k)	32	14%	27%	73%
	Medium (\$50k -<\$100k)	75	19%	27%	73%
	High (>\$100k)	69	21%	37%	63%
Employment	Working FT / PT / Casual	104	18%	30%	70%
	Retired	68	16%	31%	69%
	Other	29	29%*	39%*	61%*
Solar	Solar PVs	44	26%	37%	63%
	No Solar PVs	156	17%	30%	70%
	Solar hot water	23	24%*	31%*	69%*
	Neither	145	17%	30%	70%
Switched Energy Company or Plan	In the past 12 months	36	100%	100%	0%
	1 to 5 years ago	27	0%*	100%*	0%*
	NETT switched (Last 5 yrs)	63	60%	100%	0%
	Have not switched at all	137	0%	0%	100%
Approached by Energy Company (Last 12 Months)	Yes	50	31%	51%	49%
	No	132	14%	24%	76%
Actively Investigated Options	Yes	45	44%	57%	43%
	No	151	11%	24%	76%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	18%	23%	77%
	Medium (\$300 to \$499)	44	22%	46%	54%
	High (\$500+)	55	20%	34%	66%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	22%	32%	68%
	Medium (\$200 to \$300)	16	27%*	27%*	73%*
	High (\$300+)	58	17%	36%	64%
Customer Segments	Vulnerable Low Income	12	26%*	41%*	59%*
	Vulnerable Mid Income	9	0%**	11%**	89%**
	Vulnerable High Income	3	63%**	63%**	37%**
	Low Income Retired	21	11%*	21%*	79%*
	Average	30	36%	43%	57%
	Secure Retired	45	20%	34%	66%
	Secure High Income	80	13%	28%	72%
Willingness To Take Risks	Low (0-4)	35	12%	21%	79%
	Medium (5-7)	76	19%	32%	68%
	High (8-10)	28	18%*	32%*	68%*
Technology Adopter	Innovator	4	0%**	0%**	100%**
	Early Adopter	24	28%*	35%*	65%*
	Early Majority	68	18%	34%	66%
	Late Majority	32	14%	25%	75%
	Laggard	12	0%*	11%*	89%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?			
		(n=)	Yes
Total		200	26%
Location	Metro	200	26%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	26%
	No (Electricity only)	64	30%
Age Group	18 - 34	34	12%
	35 - 54	71	18%
	55+	95	35%
Home Ownership	Owners	153	28%
	Renters / Other	47	20%
Household Income (Annual)	Low (<\$50k)	32	15%
	Medium (\$50k -<\$100k)	75	22%
	High (>\$100k)	69	35%
Employment	Working FT / PT / Casual	104	23%
	Retired	68	33%
	Other	29	20%*
Solar	Solar PVs	44	38%
	No Solar PVs	156	23%
	Solar hot water	23	34%*
	Neither	145	24%
Switched Energy Company or Plan	In the past 12 months	36	44%
	1 to 5 years ago	27	41%*
	NETT switched (Last 5 yrs)	63	43%
	Have not switched at all	137	19%
Approached by Energy Company (Last 12 Months)	Yes	50	100%
	No	132	0%
Actively Investigated Options	Yes	45	51%
	No	151	19%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	22%
	Medium (\$300 to \$499)	44	30%
	High (\$500+)	55	34%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	29%
	Medium (\$200 to \$300)	16	19%*
	High (\$300+)	58	30%
Customer Segments	Vulnerable Low Income	12	15%*
	Vulnerable Mid Income	9	26%**
	Vulnerable High Income	3	0%**
	Low Income Retired	21	13%*
	Average	30	34%
	Secure Retired	45	41%
	Secure High Income	80	20%
Willingness To Take Risks	Low (0-4)	35	27%
	Medium (5-7)	76	29%
	High (8-10)	28	24%*
Technology Adopter	Innovator	4	24%**
	Early Adopter	24	29%*
	Early Majority	68	31%
	Late Majority	32	18%
	Laggard	12	27%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal.

		(n=)	Importance Rating (NETT 8+)						
			The price per kilowatt hour (kWh)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Availability of green energy plans	The solar feed-in tariff on offer
Total		63	64%	62%	33%	37%	65%	28%	23%
Location	Metro	63	64%	62%	33%	37%	65%	28%	23%
	Regional	0	-	-	-	-	-	-	-
Gas (Dual Fuel)	Yes	44	61%	57%	28%	36%	60%	33%	23%
	No (Electricity only)	19	71%*	75%*	46%*	40%*	78%*	18%*	24%*
Age Group	18 - 34	10	80%*	80%*	30%*	30%*	61%*	30%*	10%*
	35 - 54	26	60%*	72%*	40%*	39%*	71%*	37%*	23%*
	55+	27	60%*	50%*	30%*	38%*	63%*	23%*	27%*
Home Ownership	Owners	51	62%	63%	31%	34%	65%	26%	25%
	Renters / Other	12	69%*	55%*	43%*	49%*	66%*	43%*	10%*
Household Income (Annual)	Low (<\$50k)	9	78%**	63%**	55%**	52%**	58%**	51%**	15%**
	Medium (\$50k -<\$100k)	20	72%*	55%*	37%*	36%*	70%*	32%*	20%*
	High (>\$100k)	25	55%*	61%*	26%*	34%*	71%*	15%*	28%*
Employment	Working FT / PT / Casual	31	59%	72%	26%	32%	64%	23%	32%
	Retired	21	61%*	50%*	41%*	45%*	60%*	33%*	22%*
	Other	11	82%*	59%*	35%*	32%*	82%*	34%*	0%*
Solar	Solar PVs	16	78%*	65%*	53%*	60%*	71%*	24%*	78%*
	No Solar PVs	47	58%	60%	25%	28%	63%	30%	1%
	Solar hot water	8	100%**	87%**	42%**	62%**	75%**	0%**	67%**
	Neither	44	55%	58%	23%	28%	66%	32%*	1%
Switched Energy Company or Plan	In the past 12 months	36	65%	58%	38%	38%	75%	26%	29%
	1 to 5 years ago	27	61%*	67%*	26%*	35%*	51%*	32%*	14%*
	NETT switched (Last 5 yrs)	63	64%	62%	33%	37%	65%	28%	23%
	Have not switched at all	0	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	26	61%*	61%*	27%*	35%*	77%*	23%*	23%*
	No	32	71%	68%	38%	39%	59%	32%	26%
Actively Investigated Options	Yes	25	69%*	57%*	30%*	45%*	91%*	24%*	31%*
	No	36	62%	65%	35%	31%	48%	31%	18%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	16	64%*	64%*	24%*	32%*	63%*	36%*	21%*
	Medium (\$300 to \$499)	20	79%*	53%*	48%*	57%*	80%*	34%*	23%*
	High (\$500+)	19	54%*	59%*	20%*	22%*	64%*	15%*	23%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	10	45%*	35%*	25%*	38%*	57%*	16%*	19%*
	Medium (\$200 to \$300)	4	100%**	100%**	57%**	49%**	49%**	57%**	49%**
	High (\$300+)	21	75%*	54%*	27%*	42%*	76%*	35%*	24%*
Customer Segments	Vulnerable Low Income	5	100%**	75%**	85%**	78%**	100%**	85%**	0%**
	Vulnerable Mid Income	1	100%**	0%**	0%**	0%**	100%**	0%**	0%**
	Vulnerable High Income	2	62%**	62%**	100%**	100%**	100%**	100%**	62%**
	Low Income Retired	4	75%**	50%**	50%**	50%**	25%**	25%**	25%**
	Average	12	69%*	76%*	8%*	35%*	86%*	7%*	27%*
	Secure Retired	16	55%*	48%*	35%*	41%*	68%*	31%*	22%*
	Secure High Income	23	55%*	67%*	29%*	20%*	48%*	25%*	23%*
Willingness To Take Risks	Low (0-4)	7	68%**	54%**	68%**	41%**	36%**	23%**	18%**
	Medium (5-7)	24	59%*	49%*	28%*	35%*	70%*	31%*	18%*
	High (8-10)	9	79%**	64%**	47%**	69%**	69%**	47%**	47%**
Technology Adopter	Innovator	0	-	-	-	-	-	-	-
	Early Adopter	8	100%**	85%**	41%**	70%**	85%**	53%**	67%**
	Early Majority	23	51%*	49%*	45%*	42%*	59%*	26%*	18%*
	Late Majority	8	60%**	23%**	24%**	24%**	49%**	24%**	0%**
	Laggard	1	100%**	100%**	0%**	0%**	100%**	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal. (Cont'd)

		(n=)	Importance Rating (NETT 8+)					
			Whether the price per kilowatt hour (kWh) can change during the contract	The ability to purchase or access energy storage batteries from the electricity company	The ability to purchase or access solar panels from the electricity company	The electricity company offering access to live data about your energy use and costs	The daily supply / service charge	The brand and reputation of the company
Total		63	50%	7%	16%	19%	46%	56%
Location	Metro	63	50%	7%	16%	19%	46%	56%
	Regional	0	-	-	-	-	-	-
Gas (Dual Fuel)	Yes	44	42%	10%	20%	18%	49%	55%
	No (Electricity only)	19	69%*	0%*	7%*	24%*	37%*	58%*
Age Group	18 - 34	10	61%*	20%*	20%*	20%*	60%*	49%*
	35 - 54	26	60%*	13%*	15%*	22%*	46%*	46%*
	55+	27	40%*	0%*	16%*	18%*	41%*	63%*
Home Ownership	Owners	51	48%	2%	14%	17%	44%	58%
	Renters / Other	12	60%*	33%*	27%*	33%*	53%*	42%*
Household Income (Annual)	Low (<\$50k)	9	73%**	19%**	30%**	55%**	63%**	54%**
	Medium (\$50k -<\$100k)	20	52%*	8%*	12%*	24%*	50%*	55%*
	High (>\$100k)	25	44%*	5%*	16%*	8%*	43%*	58%*
Employment	Working FT / PT / Casual	31	45%	10%	18%	18%	43%	47%
	Retired	21	46%*	0%*	11%*	19%*	42%*	81%*
	Other	11	70%*	16%*	25%*	25%*	60%*	24%*
Solar	Solar PVs	16	67%*	6%*	40%*	33%*	62%*	60%*
	No Solar PVs	47	43%	8%	7%	14%	39%	54%
	Solar hot water	8	67%**	0%**	29%**	30%**	62%**	58%**
	Neither	44	44%	8%	7%	15%	38%	53%
Switched Energy Company or Plan	In the past 12 months	36	51%	9%	22%	20%	43%	62%
	1 to 5 years ago	27	47%*	5%*	8%*	19%*	50%*	46%*
	NETT switched (Last 5 yrs)	63	50%	7%	16%	19%	46%	56%
	Have not switched at all	0	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	26	45%*	2%*	17%*	19%*	39%*	53%*
	No	32	55%	7%	15%	17%	52%	66%
Actively Investigated Options	Yes	25	47%*	2%*	16%*	15%*	44%*	56%*
	No	36	52%	9%	17%	22%	47%	58%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	16	61%*	6%*	19%*	16%*	35%*	89%*
	Medium (\$300 to \$499)	20	50%*	12%*	9%*	17%*	69%*	28%*
	High (\$500+)	19	49%*	7%*	22%*	32%*	34%*	58%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	10	54%*	16%*	16%*	25%*	57%*	60%*
	Medium (\$200 to \$300)	4	49%**	0%**	49%**	0%**	77%**	100%**
	High (\$300+)	21	38%*	13%*	19%*	20%*	49%*	44%*
Customer Segments	Vulnerable Low Income	5	100%**	40%**	40%**	85%**	100%**	60%**
	Vulnerable Mid Income	1	100%**	0%**	0%**	0%**	100%**	0%**
	Vulnerable High Income	2	100%**	100%**	62%**	100%**	100%**	62%**
	Low Income Retired	4	25%**	0%**	0%**	25%**	50%**	75%**
	Average	12	49%*	0%*	24%*	10%*	32%*	34%*
	Secure Retired	16	50%*	0%*	15%*	13%*	37%*	81%*
	Secure High Income	23	39%*	6%*	9%*	11%*	42%*	44%*
Willingness To Take Risks	Low (0-4)	7	41%**	23%**	23%**	41%**	73%**	59%**
	Medium (5-7)	24	58%*	2%*	14%*	19%*	43%*	57%*
	High (8-10)	9	32%**	11%**	40%**	26%**	72%**	47%**
Technology Adopter	Innovator	0	-	-	-	-	-	-
	Early Adopter	8	55%**	12%**	52%**	12%**	85%**	52%**
	Early Majority	23	56%*	5%*	14%*	30%*	52%*	59%*
	Late Majority	8	32%**	13%**	13%**	24%**	36%**	39%**
	Laggard	1	0%**	0%**	0%**	0%**	0%**	100%**

*Small sample size (n<30). **Extremely small sample size (n<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		200	40%	7%	46%
Location	Metro	200	40%	7%	46%
	Regional	0	-	-	-
Gas (Dual Fuel)	Yes	131	38%	6%	53%
	No (Electricity only)	64	44%	9%	32%
Age Group	18 - 34	34	44%	6%	47%
	35 - 54	71	26%	1%	64%
	55+	95	45%	11%	36%
Home Ownership	Owners	153	37%	8%	49%
	Renters / Other	47	51%	6%	32%
Household Income (Annual)	Low (<\$50k)	32	52%	2%	35%
	Medium (\$50k -<\$100k)	75	38%	10%	44%
	High (>\$100k)	69	40%	8%	51%
Employment	Working FT / PT / Casual	104	34%	7%	57%
	Retired	68	56%	7%	29%
	Other	29	21%*	11%*	50%*
Solar	Solar PVs	44	42%	12%	39%
	No Solar PVs	156	40%	6%	48%
	Solar hot water	23	51%*	18%*	30%*
	Neither	145	39%	6%	48%
Switched Energy Company or Plan	In the past 12 months	36	17%	32%	51%
	1 to 5 years ago	27	21%*	4%*	66%*
	NETT switched (Last 5 yrs)	63	18%	21%	57%
	Have not switched at all	137	50%	1%	40%
Approached by Energy Company (Last 12 Months)	Yes	50	37%	17%	44%
	No	132	40%	5%	48%
Actively Investigated Options	Yes	45	16%	19%	65%
	No	151	48%	4%	39%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	50%	5%	39%
	Medium (\$300 to \$499)	44	24%	2%	65%
	High (\$500+)	55	36%	15%	44%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	26%	12%	59%
	Medium (\$200 to \$300)	16	43%*	0%*	44%*
	High (\$300+)	58	37%	6%	57%
Customer Segments	Vulnerable Low Income	12	35%*	6%*	49%*
	Vulnerable Mid Income	9	10%**	0%**	80%**
	Vulnerable High Income	3	0%**	39%**	61%**
	Low Income Retired	21	50%*	0%*	36%*
	Average	30	24%	19%	44%
	Secure Retired	45	59%	11%	25%
	Secure High Income	80	36%	3%	59%
Willingness To Take Risks	Low (0-4)	35	46%	5%	31%
	Medium (5-7)	76	39%	10%	46%
	High (8-10)	28	53%*	4%*	37%*
Technology Adopter	Innovator	4	61%**	0%**	39%**
	Early Adopter	24	35%*	4%*	61%*
	Early Majority	68	32%	11%	46%
	Late Majority	32	54%	7%	27%
	Laggard	12	89%*	0%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		200	73%
Location	Metro	200	73%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	75%
	No (Electricity only)	64	67%
Age Group	18 - 34	34	82%
	35 - 54	71	57%
	55+	95	77%
Home Ownership	Owners	153	71%
	Renters / Other	47	80%
Household Income (Annual)	Low (<\$50k)	32	81%
	Medium (\$50k -<\$100k)	75	69%
	High (>\$100k)	69	77%
Employment	Working FT / PT / Casual	104	69%
	Retired	68	82%
	Other	29	59%*
Solar	Solar PVs	44	81%
	No Solar PVs	156	70%
	Solar hot water	23	65%*
	Neither	145	72%
Switched Energy Company or Plan	In the past 12 months	36	75%
	1 to 5 years ago	27	59%*
	NETT switched (Last 5 yrs)	63	69%
	Have not switched at all	137	74%
Approached by Energy Company (Last 12 Months)	Yes	50	71%
	No	132	74%
Actively Investigated Options	Yes	45	69%
	No	151	74%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	71%
	Medium (\$300 to \$499)	44	80%
	High (\$500+)	55	71%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	77%
	Medium (\$200 to \$300)	16	71%*
	High (\$300+)	58	77%
Customer Segments	Vulnerable Low Income	12	73%*
	Vulnerable Mid Income	9	50%**
	Vulnerable High Income	3	63%**
	Low Income Retired	21	84%*
	Average	30	64%
	Secure Retired	45	81%
	Secure High Income	80	69%
Willingness To Take Risks	Low (0-4)	35	69%
	Medium (5-7)	76	74%
	High (8-10)	28	81%*
Technology Adopter	Innovator	4	85%**
	Early Adopter	24	76%*
	Early Majority	68	72%
	Late Majority	32	78%
	Laggard	12	68%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q7. How satisfied are you with your current gas company?			
		(n=)	Satisfied
Total		131	66%
Location	Metro	131	66%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	66%
	No (Electricity only)	0	-
Age Group	18 - 34	21	76%*
	35 - 54	44	53%
	55+	66	68%
Home Ownership	Owners	110	66%
	Renters / Other	21	65%*
Household Income (Annual)	Low (<\$50k)	20	69%*
	Medium (\$50k -<\$100k)	49	62%
	High (>\$100k)	48	74%
Employment	Working FT / PT / Casual	67	62%
	Retired	48	77%
	Other	16	39%*
Solar	Solar PVs	32	79%
	No Solar PVs	99	61%
	Solar hot water	16	65%*
	Neither	91	62%
Switched Energy Company or Plan	In the past 12 months	26	65%*
	1 to 5 years ago	18	59%*
	NETT switched (Last 5 yrs)	44	63%
	Have not switched at all	87	67%
Approached by Energy Company (Last 12 Months)	Yes	33	65%
	No	84	65%
Actively Investigated Options	Yes	26	60%*
	No	101	67%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	64%
	Medium (\$300 to \$499)	30	68%
	High (\$500+)	30	63%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	60%
	Medium (\$200 to \$300)	16	58%*
	High (\$300+)	58	70%
Customer Segments	Vulnerable Low Income	5	80%**
	Vulnerable Mid Income	8	32%**
	Vulnerable High Income	3	63%**
	Low Income Retired	13	60%*
	Average	19	54%*
	Secure Retired	34	86%
	Secure High Income	49	60%
Willingness To Take Risks	Low (0-4)	25	55%*
	Medium (5-7)	51	63%
	High (8-10)	19	81%*
Technology Adopter	Innovator	3	100%**
	Early Adopter	18	71%*
	Early Majority	45	63%
	Late Majority	20	61%*
	Laggard	9	54%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		200	68%
Location	Metro	200	68%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	70%
	No (Electricity only)	64	63%
Age Group	18 - 34	34	68%
	35 - 54	71	57%
	55+	95	73%
Home Ownership	Owners	153	66%
	Renters / Other	47	75%
Household Income (Annual)	Low (<\$50k)	32	86%
	Medium (\$50k -<\$100k)	75	62%
	High (>\$100k)	69	72%
Employment	Working FT / PT / Casual	104	62%
	Retired	68	81%
	Other	29	51%*
Solar	Solar PVs	44	74%
	No Solar PVs	156	66%
	Solar hot water	23	58%*
	Neither	145	68%
Switched Energy Company or Plan	In the past 12 months	36	68%
	1 to 5 years ago	27	59%*
	NETT switched (Last 5 yrs)	63	64%
	Have not switched at all	137	69%
Approached by Energy Company (Last 12 Months)	Yes	50	73%
	No	132	67%
Actively Investigated Options	Yes	45	67%
	No	151	69%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	79%
	Medium (\$300 to \$499)	44	66%
	High (\$500+)	55	64%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	67%
	Medium (\$200 to \$300)	16	77%*
	High (\$300+)	58	76%
Customer Segments	Vulnerable Low Income	12	72%*
	Vulnerable Mid Income	9	39%**
	Vulnerable High Income	3	39%**
	Low Income Retired	21	74%*
	Average	30	47%
	Secure Retired	45	86%
	Secure High Income	80	65%
Willingness To Take Risks	Low (0-4)	35	58%
	Medium (5-7)	76	72%
	High (8-10)	28	81%*
Technology Adopter	Innovator	4	85%**
	Early Adopter	24	78%*
	Early Majority	68	70%
	Late Majority	32	62%
	Laggard	12	71%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q8. How would you rate the overall quality of customer service provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		131	62%
Location	Metro	131	62%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	62%
	No (Electricity only)	0	-
Age Group	18 - 34	21	81%*
	35 - 54	44	47%
	55+	66	64%
Home Ownership	Owners	110	60%
	Renters / Other	21	77%*
Household Income (Annual)	Low (<\$50k)	20	70%*
	Medium (\$50k -<\$100k)	49	62%
	High (>\$100k)	48	68%
Employment	Working FT / PT / Casual	67	57%
	Retired	48	71%
	Other	16	54%*
Solar	Solar PVs	32	75%
	No Solar PVs	99	58%
	Solar hot water	16	50%*
	Neither	91	60%
Switched Energy Company or Plan	In the past 12 months	26	66%*
	1 to 5 years ago	18	50%*
	NETT switched (Last 5 yrs)	44	60%
	Have not switched at all	87	64%
Approached by Energy Company (Last 12 Months)	Yes	33	71%
	No	84	61%
Actively Investigated Options	Yes	26	70%*
	No	101	61%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	66%
	Medium (\$300 to \$499)	30	56%
	High (\$500+)	30	68%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	56%
	Medium (\$200 to \$300)	16	71%*
	High (\$300+)	58	68%
Customer Segments	Vulnerable Low Income	5	80%**
	Vulnerable Mid Income	8	33%**
	Vulnerable High Income	3	39%**
	Low Income Retired	13	52%*
	Average	19	44%*
	Secure Retired	34	80%
	Secure High Income	49	63%
Willingness To Take Risks	Low (0-4)	25	58%*
	Medium (5-7)	51	58%
	High (8-10)	19	87%*
Technology Adopter	Innovator	3	100%**
	Early Adopter	18	73%*
	Early Majority	45	62%
	Late Majority	20	56%*
	Laggard	9	61%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		200	59%
Location	Metro	200	59%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	59%
	No (Electricity only)	64	60%
Age Group	18 - 34	34	65%
	35 - 54	71	48%
	55+	95	63%
Home Ownership	Owners	153	56%
	Renters / Other	47	71%
Household Income (Annual)	Low (<\$50k)	32	76%
	Medium (\$50k -<\$100k)	75	61%
	High (>\$100k)	69	58%
Employment	Working FT / PT / Casual	104	52%
	Retired	68	70%
	Other	29	54%*
Solar	Solar PVs	44	62%
	No Solar PVs	156	58%
	Solar hot water	23	57%*
	Neither	145	60%
Switched Energy Company or Plan	In the past 12 months	36	65%
	1 to 5 years ago	27	41%*
	NETT switched (Last 5 yrs)	63	55%
	Have not switched at all	137	61%
Approached by Energy Company (Last 12 Months)	Yes	50	62%
	No	132	61%
Actively Investigated Options	Yes	45	60%
	No	151	60%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	66%
	Medium (\$300 to \$499)	44	55%
	High (\$500+)	55	58%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	59%
	Medium (\$200 to \$300)	16	73%*
	High (\$300+)	58	55%
Customer Segments	Vulnerable Low Income	12	76%*
	Vulnerable Mid Income	9	32%**
	Vulnerable High Income	3	39%**
	Low Income Retired	21	71%*
	Average	30	50%
	Secure Retired	45	69%
	Secure High Income	80	53%
Willingness To Take Risks	Low (0-4)	35	55%
	Medium (5-7)	76	61%
	High (8-10)	28	76%*
Technology Adopter	Innovator	4	85%**
	Early Adopter	24	59%*
	Early Majority	68	62%
	Late Majority	32	66%
	Laggard	12	52%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q9. How would you rate the overall value for money of the products and services provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		131	45%
Location	Metro	131	45%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	45%
	No (Electricity only)	0	-
Age Group	18 - 34	21	57%*
	35 - 54	44	39%
	55+	66	44%
Home Ownership	Owners	110	43%
	Renters / Other	21	57%*
Household Income (Annual)	Low (<\$50k)	20	59%*
	Medium (\$50k -<\$100k)	49	46%
	High (>\$100k)	48	45%
Employment	Working FT / PT / Casual	67	36%
	Retired	48	56%
	Other	16	41%*
Solar	Solar PVs	32	50%
	No Solar PVs	99	43%
	Solar hot water	16	50%*
	Neither	91	43%
Switched Energy Company or Plan	In the past 12 months	26	35%*
	1 to 5 years ago	18	34%*
	NETT switched (Last 5 yrs)	44	35%
	Have not switched at all	87	50%
Approached by Energy Company (Last 12 Months)	Yes	33	50%
	No	84	45%
Actively Investigated Options	Yes	26	35%*
	No	101	48%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	51	43%
	Medium (\$300 to \$499)	30	37%
	High (\$500+)	30	53%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	48%
	Medium (\$200 to \$300)	16	38%*
	High (\$300+)	58	44%
Customer Segments	Vulnerable Low Income	5	80%**
	Vulnerable Mid Income	8	11%**
	Vulnerable High Income	3	39%**
	Low Income Retired	13	44%*
	Average	19	30%*
	Secure Retired	34	62%
	Secure High Income	49	39%
Willingness To Take Risks	Low (0-4)	25	52%*
	Medium (5-7)	51	36%
	High (8-10)	19	66%*
Technology Adopter	Innovator	3	100%**
	Early Adopter	18	46%*
	Early Majority	45	49%
	Late Majority	20	30%*
	Laggard	9	44%**

*Small sample size (n<=30). **Extremely small sample size (n<=10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		200	47%	25%
Location	Metro	200	47%	25%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	131	46%	23%
	No (Electricity only)	64	52%	30%
Age Group	18 - 34	34	53%	26%
	35 - 54	71	32%	29%
	55+	95	53%	22%
Home Ownership	Owners	153	48%	27%
	Renters / Other	47	43%	17%
Household Income (Annual)	Low (<\$50k)	32	42%	18%
	Medium (\$50k -<\$100k)	75	56%	22%
	High (>\$100k)	69	48%	30%
Employment	Working FT / PT / Casual	104	39%	33%
	Retired	68	61%	13%
	Other	29	39%*	27%*
Solar	Solar PVs	44	66%	16%
	No Solar PVs	156	42%	28%
	Solar hot water	23	48%*	23%*
	Neither	145	43%	28%
Switched Energy Company or Plan	In the past 12 months	36	50%	26%
	1 to 5 years ago	27	32%*	29%*
	NETT switched (Last 5 yrs)	63	43%	27%
	Have not switched at all	137	50%	24%
Approached by Energy Company (Last 12 Months)	Yes	50	56%	24%
	No	132	45%	27%
Actively Investigated Options	Yes	45	48%	34%
	No	151	48%	23%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	45%	26%
	Medium (\$300 to \$499)	44	46%	31%
	High (\$500+)	55	55%	25%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	48%	26%
	Medium (\$200 to \$300)	16	43%*	23%*
	High (\$300+)	58	47%	27%
Customer Segments	Vulnerable Low Income	12	35%*	16%*
	Vulnerable Mid Income	9	32%**	22%**
	Vulnerable High Income	3	39%**	37%**
	Low Income Retired	21	54%*	22%*
	Average	30	38%	30%
	Secure Retired	45	64%	9%
	Secure High Income	80	41%	36%
Willingness To Take Risks	Low (0-4)	35	44%	21%
	Medium (5-7)	76	49%	25%
	High (8-10)	28	50%*	10%*
Technology Adopter	Innovator	4	85%**	0%**
	Early Adopter	24	30%*	44%*
	Early Majority	68	50%	18%
	Late Majority	32	52%	19%
	Laggard	12	46%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		63	79%	5%
Location	Metro	63	79%	5%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	44	82%	2%
	No (Electricity only)	19	72%*	13%*
Age Group	18 - 34	10	90%*	0%*
	35 - 54	26	74%*	9%*
	55+	27	78%*	4%*
Home Ownership	Owners	51	78%	6%
	Renters / Other	12	81%*	0%*
Household Income (Annual)	Low (<\$50k)	9	79%**	11%**
	Medium (\$50k -<\$100k)	20	86%*	0%*
	High (>\$100k)	25	73%*	9%*
Employment	Working FT / PT / Casual	31	82%	8%
	Retired	21	74%*	0%*
	Other	11	81%*	9%*
Solar	Solar PVs	16	69%*	0%*
	No Solar PVs	47	83%	7%
	Solar hot water	8	79%**	0%**
	Neither	44	84%	7%
Switched Energy Company or Plan	In the past 12 months	36	85%	5%
	1 to 5 years ago	27	70%*	5%*
	NETT switched (Last 5 yrs)	63	79%	5%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	26	85%*	8%*
	No	32	77%	3%
Actively Investigated Options	Yes	25	78%*	9%*
	No	36	78%	3%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	16	77%*	5%*
	Medium (\$300 to \$499)	20	83%*	5%*
	High (\$500+)	19	81%*	7%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	10	79%*	0%*
	Medium (\$200 to \$300)	4	71%**	0%**
	High (\$300+)	21	90%*	0%*
Customer Segments	Vulnerable Low Income	5	78%**	0%**
	Vulnerable Mid Income	1	0%**	0%**
	Vulnerable High Income	2	100%**	0%**
	Low Income Retired	4	100%**	0%**
	Average	12	76%*	24%*
	Secure Retired	16	70%*	0%*
	Secure High Income	23	85%*	0%*
Willingness To Take Risks	Low (0-4)	7	73%**	0%**
	Medium (5-7)	24	79%*	0%*
	High (8-10)	9	86%**	0%**
Technology Adopter	Innovator	0	-	-
	Early Adopter	8	85%**	0%**
	Early Majority	23	77%*	0%*
	Late Majority	8	76%**	0%**
	Laggard	1	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		63	70%	13%
Location	Metro	63	70%	13%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	44	70%	7%
	No (Electricity only)	19	70%*	30%*
Age Group	18 - 34	10	80%*	0%*
	35 - 54	26	59%*	23%*
	55+	27	73%*	12%*
Home Ownership	Owners	51	69%	14%
	Renters / Other	12	72%*	9%*
Household Income (Annual)	Low (<\$50k)	9	64%**	36%**
	Medium (\$50k -<\$100k)	20	71%*	11%*
	High (>\$100k)	25	70%*	12%*
Employment	Working FT / PT / Casual	31	74%	14%
	Retired	21	67%*	15%*
	Other	11	62%*	9%*
Solar	Solar PVs	16	62%*	13%*
	No Solar PVs	47	73%	14%
	Solar hot water	8	92%**	0%**
	Neither	44	71%	15%
Switched Energy Company or Plan	In the past 12 months	36	78%	10%
	1 to 5 years ago	27	57%*	19%*
	NETT switched (Last 5 yrs)	63	70%	13%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	26	85%*	8%*
	No	32	63%	20%
Actively Investigated Options	Yes	25	78%*	16%*
	No	36	67%	12%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	16	66%*	16%*
	Medium (\$300 to \$499)	20	70%*	11%*
	High (\$500+)	19	75%*	19%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	10	69%*	0%*
	Medium (\$200 to \$300)	4	71%**	0%**
	High (\$300+)	21	78%*	6%*
Customer Segments	Vulnerable Low Income	5	78%**	22%**
	Vulnerable Mid Income	1	0%**	0%**
	Vulnerable High Income	2	62%**	0%**
	Low Income Retired	4	75%**	25%**
	Average	12	61%*	24%*
	Secure Retired	16	69%*	7%*
	Secure High Income	23	77%*	9%*
Willingness To Take Risks	Low (0-4)	7	68%**	18%**
	Medium (5-7)	24	63%*	12%*
	High (8-10)	9	79%**	0%**
Technology Adopter	Innovator	0	-	-
	Early Adopter	8	85%**	0%**
	Early Majority	23	60%*	11%*
	Late Majority	8	65%**	23%**
	Laggard	1	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		200	61%
Location	Metro	200	61%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	62%
	No (Electricity only)	64	61%
Age Group	18 - 34	34	71%
	35 - 54	71	50%
	55+	95	63%
Home Ownership	Owners	153	59%
	Renters / Other	47	69%
Household Income (Annual)	Low (<\$50k)	32	48%
	Medium (\$50k -<\$100k)	75	68%
	High (>\$100k)	69	64%
Employment	Working FT / PT / Casual	104	58%
	Retired	68	64%
	Other	29	63%*
Solar	Solar PVs	44	74%
	No Solar PVs	156	57%
	Solar hot water	23	63%*
	Neither	145	57%
Switched Energy Company or Plan	In the past 12 months	36	68%
	1 to 5 years ago	27	68%*
	NETT switched (Last 5 yrs)	63	68%
	Have not switched at all	137	58%
Approached by Energy Company (Last 12 Months)	Yes	50	83%
	No	132	55%
Actively Investigated Options	Yes	45	71%
	No	151	58%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	63%
	Medium (\$300 to \$499)	44	69%
	High (\$500+)	55	55%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	62%
	Medium (\$200 to \$300)	16	80%*
	High (\$300+)	58	63%
Customer Segments	Vulnerable Low Income	12	48%*
	Vulnerable Mid Income	9	43%**
	Vulnerable High Income	3	76%**
	Low Income Retired	21	54%*
	Average	30	53%
	Secure Retired	45	71%
	Secure High Income	80	62%
Willingness To Take Risks	Low (0-4)	35	57%
	Medium (5-7)	76	66%
	High (8-10)	28	77%*
Technology Adopter	Innovator	4	85%**
	Early Adopter	24	75%*
	Early Majority	68	68%
	Late Majority	32	55%
	Laggard	12	55%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		200	55%
Location	Metro	200	55%
	Regional	0	-
Gas (Dual Fuel)	Yes	131	54%
	No (Electricity only)	64	57%
Age Group	18 - 34	34	53%
	35 - 54	71	45%
	55+	95	60%
Home Ownership	Owners	153	55%
	Renters / Other	47	56%
Household Income (Annual)	Low (<\$50k)	32	54%
	Medium (\$50k -<\$100k)	75	59%
	High (>\$100k)	69	58%
Employment	Working FT / PT / Casual	104	52%
	Retired	68	67%
	Other	29	29%*
Solar	Solar PVs	44	64%
	No Solar PVs	156	52%
	Solar hot water	23	61%*
	Neither	145	53%
Switched Energy Company or Plan	In the past 12 months	36	65%
	1 to 5 years ago	27	41%*
	NETT switched (Last 5 yrs)	63	56%
	Have not switched at all	137	55%
Approached by Energy Company (Last 12 Months)	Yes	50	61%
	No	132	52%
Actively Investigated Options	Yes	45	55%
	No	151	55%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	51%
	Medium (\$300 to \$499)	44	61%
	High (\$500+)	55	58%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	53%
	Medium (\$200 to \$300)	16	66%*
	High (\$300+)	58	52%
Customer Segments	Vulnerable Low Income	12	51%*
	Vulnerable Mid Income	9	17%**
	Vulnerable High Income	3	100%**
	Low Income Retired	21	53%*
	Average	30	47%
	Secure Retired	45	75%
	Secure High Income	80	48%
Willingness To Take Risks	Low (0-4)	35	53%
	Medium (5-7)	76	61%
	High (8-10)	28	64%*
Technology Adopter	Innovator	4	85%**
	Early Adopter	24	73%*
	Early Majority	68	60%
	Late Majority	32	50%
	Laggard	12	44%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NETT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		200	76%	64%	45%	54%	50%	47%	40%
Location	Metro	200	76%	64%	45%	54%	50%	47%	40%
	Regional	0	-	-	-	-	-	-	-
Gas (Dual Fuel)	Yes	131	79%	63%	42%	55%	52%	47%	35%
	No (Electricity only)	64	68%	65%	54%	53%	45%	47%	46%
Age Group	18 - 34	34	71%	74%	59%	62%	53%	59%	71%
	35 - 54	71	68%	55%	36%	45%	44%	35%	44%
	55+	95	80%	65%	45%	55%	52%	49%	28%
Home Ownership	Owners	153	76%	63%	46%	56%	49%	48%	37%
	Renters / Other	47	72%	65%	43%	44%	52%	44%	48%
Household Income (Annual)	Low (<\$50k)	32	69%	81%	56%	45%	66%	50%	28%
	Medium (\$50k -<\$100k)	75	75%	62%	41%	51%	46%	46%	36%
	High (>\$100k)	69	82%	58%	45%	58%	56%	46%	45%
Employment	Working FT / PT / Casual	104	77%	62%	43%	58%	46%	49%	54%
	Retired	68	75%	65%	52%	53%	55%	53%	23%
	Other	29	72%*	66%*	31%*	36%*	54%*	22%*	38%*
Solar	Solar PVs	44	77%	56%	44%	48%	46%	49%	30%
	No Solar PVs	156	75%	66%	46%	55%	51%	46%	43%
	Solar hot water	23	82%*	36%*	50%*	46%*	32%*	49%*	13%*
	Neither	145	75%	69%	46%	55%	55%	46%	45%
Switched Energy Company or Plan	In the past 12 months	36	81%	67%	35%	47%	41%	19%	33%
	1 to 5 years ago	27	85%*	64%*	61%*	65%*	57%*	35%*	41%*
	NETT switched (Last 5 yrs)	63	82%	66%	45%	55%	47%	26%	36%
	Have not switched at all	137	72%	62%	45%	53%	51%	56%	41%
Approached by Energy Company (Last 12 Months)	Yes	50	82%	70%	45%	48%	46%	28%	33%
	No	132	76%	65%	46%	57%	54%	54%	43%
Actively Investigated Options	Yes	45	80%	63%	29%	38%	37%	23%	29%
	No	151	75%	64%	51%	59%	54%	55%	43%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	67%	59%	44%	48%	48%	47%	42%
	Medium (\$300 to \$499)	44	81%	75%	43%	47%	63%	39%	36%
	High (\$500+)	55	82%	71%	53%	66%	48%	55%	38%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	69%	65%	30%	50%	48%	38%	42%
	Medium (\$200 to \$300)	16	72%*	41%*	33%*	27%*	40%*	45%*	24%*
	High (\$300+)	58	85%	74%	46%	62%	55%	49%	29%
Customer Segments	Vulnerable Low Income	12	65%*	68%*	37%*	28%*	28%*	34%*	28%*
	Vulnerable Mid Income	9	90%**	85%**	22%**	69%**	57%**	32%**	54%**
	Vulnerable High Income	3	76%**	100%**	39%**	100%**	39%**	76%**	39%**
	Low Income Retired	21	80%*	70%*	43%*	55%*	62%*	58%*	17%*
	Average	30	81%	56%	34%	46%	50%	27%	38%
	Secure Retired	45	73%	63%	57%	52%	54%	51%	25%
Willingness To Take Risks	Secure High Income	80	73%	61%	47%	58%	46%	51%	58%
	Low (0-4)	35	60%	66%	43%	44%	48%	41%	29%
	Medium (5-7)	76	77%	67%	37%	50%	47%	46%	37%
Technology Adopter	High (8-10)	28	75%*	54%*	38%*	39%*	41%*	37%*	25%*
	Innovator	4	85%**	24%**	0%**	0%**	55%**	61%**	39%**
	Early Adopter	24	80%*	67%*	27%*	52%*	39%*	27%*	28%*
	Early Majority	68	77%	66%	41%	51%	50%	44%	37%
	Late Majority	32	60%	64%	45%	42%	39%	55%	25%
	Laggard	12	60%*	57%*	48%*	30%*	51%*	33%*	30%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		200	3%	16%	22%	24%	21%	25%	27%
Location	Metro	200	3%	16%	22%	24%	21%	25%	27%
	Regional	0	-	-	-	-	-	-	-
Gas (Dual Fuel)	Yes	131	3%	18%	25%	23%	20%	25%	30%
	No (Electricity only)	64	4%	11%	19%	25%	23%	26%	25%
Age Group	18 - 34	34	3%	9%	12%	21%	15%	15%	6%
	35 - 54	71	5%	18%	32%	22%	26%	31%	29%
	55+	95	2%	16%	21%	25%	20%	26%	34%
Home Ownership	Owners	153	3%	16%	23%	25%	22%	26%	30%
	Renters / Other	47	3%	13%	20%	20%	17%	21%	17%
Household Income (Annual)	Low (<\$50k)	32	3%	5%	15%	25%	8%	21%	27%
	Medium (\$50k -<\$100k)	75	5%	15%	22%	24%	27%	25%	28%
	High (>\$100k)	69	1%	21%	30%	25%	16%	32%	29%
Employment	Working FT / PT / Casual	104	3%	18%	26%	24%	26%	25%	17%
	Retired	68	3%	13%	18%	22%	15%	21%	37%
	Other	29	3%*	13%*	21%*	26%*	20%*	37%*	36%*
Solar	Solar PVs	44	0%	20%	17%	30%	21%	24%	36%
	No Solar PVs	156	4%	14%	24%	22%	21%	26%	25%
	Solar hot water	23	0%*	18%*	14%*	32%*	41%*	32%*	42%*
	Neither	145	4%	15%	25%	23%	18%	25%	25%
Switched Energy Company or Plan	In the past 12 months	36	2%	11%	36%	34%	36%	67%	44%
	1 to 5 years ago	27	6%*	25%*	30%*	18%*	26%*	32%*	45%*
	NETT switched (Last 5 yrs)	63	4%	17%	33%	27%	32%	53%	44%
	Have not switched at all	137	3%	15%	17%	22%	16%	13%	20%
Approached by Energy Company (Last 12 Months)	Yes	50	4%	20%	31%	33%	24%	44%	44%
	No	132	2%	15%	21%	20%	21%	18%	22%
Actively Investigated Options	Yes	45	8%	19%	37%	44%	34%	53%	53%
	No	151	1%	15%	17%	18%	17%	16%	20%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	74	3%	16%	21%	25%	19%	18%	21%
	Medium (\$300 to \$499)	44	4%	15%	24%	30%	17%	34%	32%
	High (\$500+)	55	2%	14%	24%	20%	24%	27%	33%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	33	0%	16%	34%	35%	20%	24%	29%
	Medium (\$200 to \$300)	16	0%*	37%*	29%*	33%*	14%*	21%*	29%*
	High (\$300+)	58	3%	12%	18%	18%	22%	27%	30%
Customer Segments	Vulnerable Low Income	12	0%*	6%*	16%*	16%*	24%*	28%*	31%*
	Vulnerable Mid Income	9	0%**	15%**	22%**	10%**	19%**	20%**	25%**
	Vulnerable High Income	3	0%**	0%**	0%**	0%**	61%**	24%**	24%**
	Low Income Retired	21	0%*	16%*	14%*	18%*	14%*	8%*	34%*
	Average	30	3%	17%	29%	29%	20%	44%	30%
	Secure Retired	45	4%	12%	20%	24%	13%	28%	39%
Willingness To Take Risks	Secure High Income	80	4%	19%	26%	26%	27%	22%	16%
	Low (0-4)	35	5%	10%	24%	30%	14%	24%	28%
	Medium (5-7)	76	4%	9%	15%	23%	22%	23%	22%
Technology Adopter	High (8-10)	28	0%*	24%*	24%*	29%*	27%*	18%*	44%*
	Innovator	4	0%**	61%**	55%**	76%**	31%**	0%**	61%**
	Early Adopter	24	0%*	14%*	5%*	26%*	31%*	29%*	37%*
	Early Majority	68	1%	10%	21%	24%	20%	26%	25%
	Late Majority	32	11%	14%	24%	32%	19%	17%	30%
	Laggard	12	0%*	0%*	11%*	0%*	8%*	8%*	0%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Appendix Seven: Victoria Tables

NB: Tables with total base size of n=<30 are not displayed.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		478	95%
Location	Metro	358	96%
	Regional	120	95%
Gas (Dual Fuel)	Yes	352	96%
	No (Electricity only)	104	94%
Age Group	18 - 34	149	92%
	35 - 54	195	96%
	55+	134	98%
Home Ownership	Owners	318	97%
	Renters / Other	160	93%
Household Income (Annual)	Low (<\$50k)	139	97%
	Medium (\$50k -<\$100k)	153	94%
	High (>\$100k)	113	97%
Employment	Working FT / PT / Casual	288	95%
	Retired	90	96%
	Other	106	94%
Solar	Solar PVs	87	99%
	No Solar PVs	391	94%
	Solar hot water	50	94%
	Neither	353	96%
Switched Energy Company or Plan	In the past 12 months	139	98%
	1 to 5 years ago	121	98%
	NETT switched (Last 5 yrs)	260	98%
	Have not switched at all	218	92%
Approached by Energy Company (Last 12 Months)	Yes	214	97%
	No	211	96%
Actively Investigated Options	Yes	148	98%
	No	310	96%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	95%
	Medium (\$300 to \$499)	136	99%
	High (\$500+)	110	96%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	95%
	Medium (\$200 to \$300)	80	96%
	High (\$300+)	101	99%
Customer Segments	Vulnerable Low Income	59	98%
	Vulnerable Mid Income	33	87%
	Vulnerable High Income	24	100%*
	Low Income Retired	50	98%
	Average	87	94%
	Secure Retired	38	95%
	Secure High Income	187	95%
Willingness To Take Risks	Low (0-4)	93	97%
	Medium (5-7)	168	94%
	High (8-10)	117	98%
Technology Adopter	Innovator	49	94%
	Early Adopter	79	98%
	Early Majority	142	96%
	Late Majority	70	96%
	Laggard	43	88%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q13. Please tell me whether you think the following statements are True or False. b) Consumers in your state [territory] can choose their gas company.			
		(n=)	True
Total		352	93%
Location	Metro	282	93%
	Regional	70	94%
Gas (Dual Fuel)	Yes	352	93%
	No (Electricity only)	0	-
Age Group	18 - 34	96	88%
	35 - 54	152	95%
	55+	104	95%
Home Ownership	Owners	251	93%
	Renters / Other	101	92%
Household Income (Annual)	Low (<\$50k)	99	92%
	Medium (\$50k -<\$100k)	118	95%
	High (>\$100k)	86	92%
Employment	Working FT / PT / Casual	211	93%
	Retired	71	93%
	Other	74	93%
Solar	Solar PVs	70	94%
	No Solar PVs	282	93%
	Solar hot water	37	92%
	Neither	259	93%
Switched Energy Company or Plan	In the past 12 months	109	95%
	1 to 5 years ago	89	97%
	NETT switched (Last 5 yrs)	198	96%
	Have not switched at all	154	89%
Approached by Energy Company (Last 12 Months)	Yes	173	93%
	No	143	95%
Actively Investigated Options	Yes	114	94%
	No	226	93%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	138	93%
	Medium (\$300 to \$499)	113	95%
	High (\$500+)	66	92%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	93%
	Medium (\$200 to \$300)	80	95%
	High (\$300+)	101	93%
Customer Segments	Vulnerable Low Income	41	92%
	Vulnerable Mid Income	24	91%*
	Vulnerable High Income	18	82%*
	Low Income Retired	39	95%
	Average	61	93%
	Secure Retired	31	91%
	Secure High Income	138	95%
Willingness To Take Risks	Low (0-4)	74	94%
	Medium (5-7)	120	89%
	High (8-10)	101	95%
Technology Adopter	Innovator	40	87%
	Early Adopter	70	94%
	Early Majority	105	93%
	Late Majority	52	93%
	Laggard	30	86%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		478	86%
Location	Metro	358	87%
	Regional	120	84%
Gas (Dual Fuel)	Yes	352	88%
	No (Electricity only)	104	85%
Age Group	18 - 34	149	82%
	35 - 54	195	85%
	55+	134	92%
Home Ownership	Owners	318	88%
	Renters / Other	160	82%
Household Income (Annual)	Low (<\$50k)	139	86%
	Medium (\$50k -<\$100k)	153	87%
	High (>\$100k)	113	89%
Employment	Working FT / PT / Casual	288	85%
	Retired	90	90%
	Other	106	87%
Solar	Solar PVs	87	90%
	No Solar PVs	391	86%
	Solar hot water	50	90%
	Neither	353	87%
Switched Energy Company or Plan	In the past 12 months	139	87%
	1 to 5 years ago	121	88%
	NETT switched (Last 5 yrs)	260	88%
	Have not switched at all	218	85%
Approached by Energy Company (Last 12 Months)	Yes	214	87%
	No	211	88%
Actively Investigated Options	Yes	148	89%
	No	310	87%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	90%
	Medium (\$300 to \$499)	136	87%
	High (\$500+)	110	84%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	87%
	Medium (\$200 to \$300)	80	91%
	High (\$300+)	101	86%
Customer Segments	Vulnerable Low Income	59	90%
	Vulnerable Mid Income	33	67%
	Vulnerable High Income	24	73%*
	Low Income Retired	50	87%
	Average	87	87%
	Secure Retired	38	94%
	Secure High Income	187	88%
Willingness To Take Risks	Low (0-4)	93	86%
	Medium (5-7)	168	85%
	High (8-10)	117	87%
Technology Adopter	Innovator	49	82%
	Early Adopter	79	89%
	Early Majority	142	87%
	Late Majority	70	84%
	Laggard	43	79%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		352	84%
Location	Metro	282	84%
	Regional	70	82%
Gas (Dual Fuel)	Yes	352	84%
	No (Electricity only)	0	-
Age Group	18 - 34	96	80%
	35 - 54	152	84%
	55+	104	87%
Home Ownership	Owners	251	85%
	Renters / Other	101	81%
Household Income (Annual)	Low (<\$50k)	99	82%
	Medium (\$50k -<\$100k)	118	87%
	High (>\$100k)	86	82%
Employment	Working FT / PT / Casual	211	84%
	Retired	71	84%
	Other	74	83%
Solar	Solar PVs	70	83%
	No Solar PVs	282	84%
	Solar hot water	37	82%
	Neither	259	84%
Switched Energy Company or Plan	In the past 12 months	109	84%
	1 to 5 years ago	89	83%
	NETT switched (Last 5 yrs)	198	83%
	Have not switched at all	154	85%
Approached by Energy Company (Last 12 Months)	Yes	173	83%
	No	143	86%
Actively Investigated Options	Yes	114	84%
	No	226	84%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	138	88%
	Medium (\$300 to \$499)	113	85%
	High (\$500+)	66	78%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	84%
	Medium (\$200 to \$300)	80	87%
	High (\$300+)	101	82%
Customer Segments	Vulnerable Low Income	41	88%
	Vulnerable Mid Income	24	69%*
	Vulnerable High Income	18	76%*
	Low Income Retired	39	81%
	Average	61	88%
	Secure Retired	31	87%
	Secure High Income	138	85%
Willingness To Take Risks	Low (0-4)	74	88%
	Medium (5-7)	120	82%
	High (8-10)	101	83%
Technology Adopter	Innovator	40	83%
	Early Adopter	70	81%
	Early Majority	105	89%
	Late Majority	52	85%
	Laggard	30	70%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?			
		(n=)	Yes
Total		478	32%
Location	Metro	358	31%
	Regional	120	35%
Gas (Dual Fuel)	Yes	352	33%
	No (Electricity only)	104	28%
Age Group	18 - 34	149	32%
	35 - 54	195	27%
	55+	134	36%
Home Ownership	Owners	318	33%
	Renters / Other	160	29%
Household Income (Annual)	Low (<\$50k)	139	28%
	Medium (\$50k -<\$100k)	153	33%
	High (>\$100k)	113	35%
Employment	Working FT / PT / Casual	288	30%
	Retired	90	38%
	Other	106	30%
Solar	Solar PVs	87	49%
	No Solar PVs	391	28%
	Solar hot water	50	46%
	Neither	353	27%
Switched Energy Company or Plan	In the past 12 months	139	53%
	1 to 5 years ago	121	27%
	NETT switched (Last 5 yrs)	260	41%
	Have not switched at all	218	21%
Approached by Energy Company (Last 12 Months)	Yes	214	43%
	No	211	25%
Actively Investigated Options	Yes	148	100%
	No	310	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	32%
	Medium (\$300 to \$499)	136	29%
	High (\$500+)	110	38%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	34%
	Medium (\$200 to \$300)	80	31%
	High (\$300+)	101	36%
Customer Segments	Vulnerable Low Income	59	27%
	Vulnerable Mid Income	33	39%
	Vulnerable High Income	24	54%*
	Low Income Retired	50	32%
	Average	87	30%
	Secure Retired	38	46%
	Secure High Income	187	26%
Willingness To Take Risks	Low (0-4)	93	31%
	Medium (5-7)	168	28%
	High (8-10)	117	38%
Technology Adopter	Innovator	49	36%
	Early Adopter	79	43%
	Early Majority	142	28%
	Late Majority	70	28%
	Laggard	43	22%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q51. The last time you switched your electricity company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		250	59%	18%
Location	Metro	181	60%	17%
	Regional	69	57%	18%
Gas (Dual Fuel)	Yes	188	62%	16%
	No (Electricity only)	53	50%	27%
Age Group	18 - 34	62	63%	11%
	35 - 54	109	54%	22%
	55+	79	61%	18%
Home Ownership	Owners	168	60%	18%
	Renters / Other	82	58%	18%
Household Income (Annual)	Low (<\$50k)	78	55%	13%
	Medium (\$50k -<\$100k)	80	74%	12%
	High (>\$100k)	56	50%	27%
Employment	Working FT / PT / Casual	146	63%	16%
	Retired	51	52%	20%
	Other	56	53%	22%
Solar	Solar PVs	45	60%	18%
	No Solar PVs	205	59%	18%
	Solar hot water	22	60%*	14%*
	Neither	194	58%	18%
Switched Energy Company or Plan	In the past 12 months	131	60%	15%
	1 to 5 years ago	119	59%	20%
	NETT switched (Last 5 yrs)	250	59%	18%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	136	58%	23%
	No	95	62%	10%
Actively Investigated Options	Yes	99	67%	21%
	No	145	56%	16%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	99	63%	10%
	Medium (\$300 to \$499)	82	62%	19%
	High (\$500+)	49	52%	32%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	76	66%	9%
	Medium (\$200 to \$300)	39	55%	32%
	High (\$300+)	57	64%	12%
Customer Segments	Vulnerable Low Income	39	49%	25%
	Vulnerable Mid Income	20	66%*	14%*
	Vulnerable High Income	8	87%**	0%**
	Low Income Retired	29	48%*	20%*
	Average	45	59%	25%
	Secure Retired	21	57%*	21%*
	Secure High Income	88	65%	11%
Willingness To Take Risks	Low (0-4)	41	44%	21%
	Medium (5-7)	86	63%	11%
	High (8-10)	63	67%	10%
Technology Adopter	Innovator	21	71%*	5%*
	Early Adopter	45	67%	12%
	Early Majority	73	56%	15%
	Late Majority	35	56%	12%
	Laggard	16	51%*	20%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q56. The last time you switched your gas company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		160	64%	14%
Location	Metro	140	64%	14%
	Regional	20	63%*	13%*
Gas (Dual Fuel)	Yes	160	64%	14%
	No (Electricity only)	0	-	-
Age Group	18 - 34	31	64%	10%
	35 - 54	73	63%	15%
	55+	56	64%	15%
Home Ownership	Owners	115	62%	14%
	Renters / Other	45	69%	12%
Household Income (Annual)	Low (<\$50k)	43	66%	10%
	Medium (\$50k -<\$100k)	55	69%	10%
	High (>\$100k)	36	56%	17%
Employment	Working FT / PT / Casual	96	67%	12%
	Retired	36	60%	18%
	Other	30	60%	15%
Solar	Solar PVs	26	65%*	15%*
	No Solar PVs	134	64%	13%
	Solar hot water	9	47%**	0%**
	Neither	128	64%	14%
Switched Energy Company or Plan	In the past 12 months	92	68%	12%
	1 to 5 years ago	68	59%	16%
	NETT switched (Last 5 yrs)	160	64%	14%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	88	61%	19%
	No	59	66%	8%
Actively Investigated Options	Yes	64	69%	18%
	No	92	60%	11%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	61	60%	12%
	Medium (\$300 to \$499)	59	68%	12%
	High (\$500+)	28	64%*	19%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	65	67%	8%
	Medium (\$200 to \$300)	30	51%	28%
	High (\$300+)	53	71%	9%
Customer Segments	Vulnerable Low Income	19	50%*	18%*
	Vulnerable Mid Income	12	62%*	6%*
	Vulnerable High Income	4	100%**	0%**
	Low Income Retired	20	58%*	22%*
	Average	29	69%*	14%*
	Secure Retired	16	62%*	13%*
	Secure High Income	60	67%	11%
Willingness To Take Risks	Low (0-4)	27	49%*	15%*
	Medium (5-7)	56	64%	11%
	High (8-10)	44	73%	12%
Technology Adopter	Innovator	13	68%*	9%*
	Early Adopter	32	79%	10%
	Early Majority	49	57%	15%
	Late Majority	26	65%*	10%*
	Laggard	7	34%**	14%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q17a. In the past 5 years, how many times have you changed the following? Q17b. And was that in the last 12 months?					
		(n=)	% Changed in past 12 months	% Changed in past 5 years	% Not Switched in Last 5 Years
Total		478	30%	54%	46%
Location	Metro	358	31%	53%	47%
	Regional	120	25%	58%	42%
Gas (Dual Fuel)	Yes	352	32%	56%	44%
	No (Electricity only)	104	23%	50%	50%
Age Group	18 - 34	149	27%	42%	58%
	35 - 54	195	31%	57%	43%
	55+	134	31%	64%	36%
Home Ownership	Owners	318	29%	55%	45%
	Renters / Other	160	31%	52%	48%
Household Income (Annual)	Low (<\$50k)	139	32%	59%	41%
	Medium (\$50k -<\$100k)	153	30%	54%	46%
	High (>\$100k)	113	25%	51%	49%
Employment	Working FT / PT / Casual	288	27%	52%	48%
	Retired	90	29%	61%	39%
	Other	106	35%	55%	45%
Solar	Solar PVs	87	30%	55%	45%
	No Solar PVs	391	29%	54%	46%
	Solar hot water	50	20%	46%	54%
	Neither	353	31%	57%	43%
Switched Energy Company or Plan	In the past 12 months	139	100%	100%	0%
	1 to 5 years ago	121	0%	100%	0%
	NETT switched (Last 5 yrs)	260	55%	100%	0%
	Have not switched at all	218	0%	0%	100%
Approached by Energy Company (Last 12 Months)	Yes	214	36%	65%	35%
	No	211	26%	47%	53%
Actively Investigated Options	Yes	148	49%	70%	30%
	No	310	20%	48%	52%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	29%	56%	44%
	Medium (\$300 to \$499)	136	32%	62%	38%
	High (\$500+)	110	33%	47%	53%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	36%	57%	43%
	Medium (\$200 to \$300)	80	23%	50%	50%
	High (\$300+)	101	38%	63%	37%
Customer Segments	Vulnerable Low Income	59	41%	67%	33%
	Vulnerable Mid Income	33	36%	59%	41%
	Vulnerable High Income	24	32%*	36%*	64%*
	Low Income Retired	50	27%	62%	38%
	Average	87	29%	55%	45%
	Secure Retired	38	31%	60%	40%
	Secure High Income	187	25%	47%	53%
Willingness To Take Risks	Low (0-4)	93	33%	50%	50%
	Medium (5-7)	168	27%	53%	47%
	High (8-10)	117	30%	57%	43%
Technology Adopter	Innovator	49	22%	43%	57%
	Early Adopter	79	32%	59%	41%
	Early Majority	142	31%	54%	46%
	Late Majority	70	30%	59%	41%
	Laggard	43	24%	37%	63%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?			
		(n=)	Yes
Total		478	45%
Location	Metro	358	44%
	Regional	120	48%
Gas (Dual Fuel)	Yes	352	50%
	No (Electricity only)	104	33%
Age Group	18 - 34	149	42%
	35 - 54	195	43%
	55+	134	51%
Home Ownership	Owners	318	49%
	Renters / Other	160	38%
Household Income (Annual)	Low (<\$50k)	139	43%
	Medium (\$50k -<\$100k)	153	45%
	High (>\$100k)	113	47%
Employment	Working FT / PT / Casual	288	41%
	Retired	90	56%
	Other	106	46%
Solar	Solar PVs	87	60%
	No Solar PVs	391	42%
	Solar hot water	50	51%
	Neither	353	43%
Switched Energy Company or Plan	In the past 12 months	139	55%
	1 to 5 years ago	121	53%
	NETT switched (Last 5 yrs)	260	54%
	Have not switched at all	218	35%
Approached by Energy Company (Last 12 Months)	Yes	214	100%
	No	211	0%
Actively Investigated Options	Yes	148	61%
	No	310	40%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	46%
	Medium (\$300 to \$499)	136	48%
	High (\$500+)	110	44%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	50%
	Medium (\$200 to \$300)	80	45%
	High (\$300+)	101	55%
Customer Segments	Vulnerable Low Income	59	44%
	Vulnerable Mid Income	33	59%
	Vulnerable High Income	24	78%*
	Low Income Retired	50	46%
	Average	87	39%
	Secure Retired	38	67%
	Secure High Income	187	36%
Willingness To Take Risks	Low (0-4)	93	44%
	Medium (5-7)	168	42%
	High (8-10)	117	48%
Technology Adopter	Innovator	49	45%
	Early Adopter	79	50%
	Early Majority	142	42%
	Late Majority	70	40%
	Laggard	43	43%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal.

		(n=)	Importance Rating (NETT 8+)						
			The price per kilowatt hour (kWh)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Availability of green energy plans	The solar feed-in tariff on offer
Total		250	73%	68%	46%	57%	79%	32%	26%
Location	Metro	181	73%	73%	48%	60%	80%	30%	24%
	Regional	69	72%	57%	40%	48%	77%	36%	32%
Gas (Dual Fuel)	Yes	188	74%	70%	50%	60%	83%	30%	24%
	No (Electricity only)	53	69%	60%	32%	44%	63%	35%	36%
Age Group	18 - 34	62	52%	63%	37%	50%	63%	31%	23%
	35 - 54	109	79%	70%	48%	61%	80%	36%	31%
	55+	79	82%	70%	49%	57%	88%	28%	25%
Home Ownership	Owners	168	79%	73%	49%	58%	87%	33%	32%
	Renters / Other	82	59%	58%	38%	55%	63%	29%	15%
Household Income (Annual)	Low (<\$50k)	78	69%	66%	44%	57%	77%	29%	27%
	Medium (\$50k -<\$100k)	80	77%	72%	41%	58%	85%	38%	26%
	High (>\$100k)	56	69%	67%	41%	51%	69%	31%	27%
Employment	Working FT / PT / Casual	146	69%	71%	43%	57%	75%	34%	30%
	Retired	51	79%	66%	48%	51%	86%	28%	19%
	Other	56	75%	65%	50%	62%	80%	30%	26%
Solar	Solar PVs	45	72%	75%	53%	55%	85%	55%	80%
	No Solar PVs	205	73%	67%	44%	57%	78%	26%	14%
	Solar hot water	22	72%*	59%*	38%*	48%*	86%*	33%*	63%*
	Neither	194	73%	67%	43%	57%	77%	26%	13%
Switched Energy Company or Plan	In the past 12 months	131	75%	72%	42%	57%	82%	33%	26%
	1 to 5 years ago	119	70%	64%	50%	56%	75%	30%	27%
	NETT switched (Last 5 yrs)	250	73%	68%	46%	57%	79%	32%	26%
	Have not switched at all	0	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	136	72%	67%	49%	59%	81%	29%	27%
	No	95	75%	68%	42%	55%	79%	35%	25%
Actively Investigated Options	Yes	99	78%	71%	46%	60%	84%	35%	30%
	No	145	70%	66%	45%	54%	75%	29%	24%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	99	70%	71%	46%	56%	80%	23%	25%
	Medium (\$300 to \$499)	82	72%	69%	44%	63%	79%	37%	30%
	High (\$500+)	49	86%	69%	41%	46%	83%	38%	26%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	76	74%	68%	38%	60%	85%	24%	17%
	Medium (\$200 to \$300)	39	78%	82%	68%	66%	91%	30%	36%
	High (\$300+)	57	72%	68%	49%	55%	77%	38%	25%
Customer Segments	Vulnerable Low Income	39	70%	68%	45%	60%	79%	25%	25%
	Vulnerable Mid Income	20	71%*	74%*	50%*	67%*	71%*	59%*	35%*
	Vulnerable High Income	8	60%**	74%**	40%**	38%**	60%**	25%**	47%**
	Low Income Retired	29	80%*	58%*	45%*	56%*	86%*	23%*	11%*
	Average	45	73%	73%	49%	62%	88%	33%	34%
	Secure Retired	21	77%*	75%*	52%*	42%*	85%*	32%*	28%*
	Secure High Income	88	71%	66%	42%	57%	72%	31%	24%
Willingness To Take Risks	Low (0-4)	41	82%	65%	55%	61%	75%	22%	21%
	Medium (5-7)	86	68%	73%	49%	58%	77%	31%	27%
	High (8-10)	63	80%	76%	51%	62%	87%	37%	30%
Technology Adopter	Innovator	21	73%*	77%*	65%*	77%*	79%*	48%*	40%*
	Early Adopter	45	83%	70%	48%	54%	78%	44%	41%
	Early Majority	73	69%	69%	45%	59%	80%	22%	17%
	Late Majority	35	76%	76%	57%	63%	89%	28%	25%
	Laggard	16	84%*	76%*	51%*	52%*	66%*	19%*	21%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal. (Cont'd)

		(n=)	Importance Rating (NETT 8+)					
			Whether the price per kilowatt hour (kWh) can change during the contract	The ability to purchase or access energy storage batteries from the electricity company	The ability to purchase or access solar panels from the electricity company	The electricity company offering access to live data about your energy use and costs	The daily supply / service charge	The brand and reputation of the company
Total		250	62%	14%	18%	30%	70%	46%
Location	Metro	181	62%	17%	20%	32%	67%	48%
	Regional	69	62%	6%	11%	24%	75%	41%
Gas (Dual Fuel)	Yes	188	64%	16%	20%	32%	72%	48%
	No (Electricity only)	53	54%	5%	9%	21%	61%	37%
Age Group	18 - 34	62	55%	15%	23%	34%	54%	37%
	35 - 54	109	66%	19%	20%	38%	74%	47%
	55+	79	62%	9%	12%	19%	77%	52%
Home Ownership	Owners	168	63%	15%	20%	31%	75%	50%
	Renters / Other	82	58%	11%	13%	27%	59%	39%
Household Income (Annual)	Low (<\$50k)	78	72%	8%	13%	31%	71%	44%
	Medium (\$50k -<\$100k)	80	57%	16%	19%	27%	72%	50%
	High (>\$100k)	56	52%	16%	20%	34%	62%	43%
Employment	Working FT / PT / Casual	146	57%	17%	22%	35%	62%	44%
	Retired	51	63%	9%	8%	19%	77%	47%
	Other	56	70%	11%	16%	28%	80%	48%
Solar	Solar PVs	45	66%	26%	36%	45%	74%	59%
	No Solar PVs	205	61%	11%	13%	26%	69%	43%
	Solar hot water	22	58%*	10%*	9%*	33%*	58%*	46%*
	Neither	194	61%	11%	14%	25%	69%	43%
Switched Energy Company or Plan	In the past 12 months	131	65%	12%	19%	32%	71%	50%
	1 to 5 years ago	119	57%	17%	16%	27%	68%	42%
	NETT switched (Last 5 yrs)	250	62%	14%	18%	30%	70%	46%
	Have not switched at all	0	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	136	61%	12%	18%	30%	68%	45%
	No	95	61%	15%	18%	27%	73%	49%
Actively Investigated Options	Yes	99	67%	13%	14%	33%	77%	46%
	No	145	57%	15%	20%	27%	65%	46%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	99	60%	9%	13%	26%	68%	46%
	Medium (\$300 to \$499)	82	68%	17%	22%	33%	69%	46%
	High (\$500+)	49	63%	16%	19%	27%	76%	49%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	76	61%	9%	13%	29%	71%	51%
	Medium (\$200 to \$300)	39	68%	23%	22%	27%	80%	54%
	High (\$300+)	57	65%	19%	27%	41%	67%	42%
Customer Segments	Vulnerable Low Income	39	73%	15%	15%	27%	74%	48%
	Vulnerable Mid Income	20	71%*	19%*	21%*	45%*	69%*	60%*
	Vulnerable High Income	8	52%**	13%**	22%**	33%**	52%**	35%**
	Low Income Retired	29	77%*	0%*	0%*	17%*	80%*	48%*
	Average	45	61%	13%	24%	32%	67%	58%
	Secure Retired	21	43%*	18%*	15%*	18%*	74%*	43%*
Willingness To Take Risks	Secure High Income	88	55%	18%	23%	35%	66%	37%
	Low (0-4)	41	68%	8%	14%	23%	75%	60%
	Medium (5-7)	86	55%	16%	20%	28%	69%	44%
Technology Adopter	High (8-10)	63	72%	25%	26%	43%	83%	55%
	Innovator	21	79%*	45%*	52%*	47%*	79%*	65%*
	Early Adopter	45	71%	24%	27%	52%	82%	58%
	Early Majority	73	49%	9%	13%	23%	68%	45%
	Late Majority	35	71%	16%	19%	19%	76%	44%
	Laggard	16	72%*	0%*	0%*	25%*	82%*	62%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q54. Below is a range of factors that people might consider when changing their gas company, plan or deal. For each one please rate how important it was in your decision to switch your gas company or plan.										
		(n=)	Importance Rating (NETT 8+)							
			The price per megajoule (MJ)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Whether the price can change during the contract	The daily supply / service charge	The brand and reputation of the company
Total		160	80%	74%	54%	56%	86%	60%	75%	0%
Location	Metro	140	80%	77%	54%	55%	85%	59%	74%	0%
	Regional	20	79%*	57%*	54%*	59%*	89%*	65%*	81%*	0%*
Gas (Dual Fuel)	Yes	160	80%	74%	54%	56%	86%	60%	75%	0%
	No (Electricity only)	0	-	-	-	-	-	-	-	-
Age Group	18 - 34	31	64%	77%	39%	52%	81%	61%	65%	0%
	35 - 54	73	81%	66%	62%	62%	85%	55%	73%	0%
	55+	56	86%	79%	55%	53%	89%	64%	81%	0%
Home Ownership	Owners	115	83%	75%	55%	59%	87%	62%	77%	0%
	Renters / Other	45	71%	73%	52%	48%	82%	54%	68%	0%
Household Income (Annual)	Low (<\$50k)	43	79%	77%	51%	50%	85%	61%	72%	0%
	Medium (\$50k -<\$100k)	55	82%	76%	49%	56%	86%	66%	84%	0%
	High (>\$100k)	36	81%	62%	59%	51%	80%	48%	64%	0%
Employment	Working FT / PT / Casual	96	77%	73%	52%	51%	82%	57%	69%	0%
	Retired	36	90%	76%	56%	55%	92%	69%	87%	0%
	Other	30	77%	76%	61%	72%	89%	55%	75%	0%
Solar	Solar PVs	26	71%*	81%*	56%*	52%*	80%*	62%*	64%*	0%*
	No Solar PVs	134	82%	73%	54%	57%	87%	60%	77%	0%
	Solar hot water	9	62%**	42%**	35%**	32%**	62%**	35%**	35%**	0%**
	Neither	128	82%	74%	54%	57%	87%	60%	78%	0%
Switched Energy Company or Plan	In the past 12 months	92	77%	79%	55%	59%	88%	66%	76%	0%
	1 to 5 years ago	68	84%	68%	52%	51%	83%	52%	73%	0%
	NETT switched (Last 5 yrs)	160	80%	74%	54%	56%	86%	60%	75%	0%
	Have not switched at all	0	-	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	88	79%	74%	56%	61%	87%	58%	74%	0%
	No	59	80%	72%	49%	46%	84%	60%	74%	0%
Actively Investigated Options	Yes	64	82%	74%	53%	57%	87%	63%	73%	0%
	No	92	79%	73%	54%	54%	84%	58%	76%	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	61	78%	75%	47%	49%	94%	66%	75%	0%
	Medium (\$300 to \$499)	59	79%	75%	59%	63%	80%	59%	70%	0%
	High (\$500+)	28	89%*	76%*	55%*	55%*	88%*	50%*	82%*	0%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	65	77%	69%	46%	48%	91%	59%	72%	0%
	Medium (\$200 to \$300)	30	93%	74%	64%	68%	97%	57%	81%	0%
	High (\$300+)	53	79%	84%	58%	60%	78%	64%	74%	0%
Customer Segments	Vulnerable Low Income	19	68%*	76%*	53%*	59%*	89%*	44%*	61%*	0%*
	Vulnerable Mid Income	12	75%*	53%*	50%*	50%*	60%*	54%*	75%*	0%*
	Vulnerable High Income	4	70%**	70%**	19%**	51%**	70%**	51%**	51%**	0%**
	Low Income Retired	20	91%*	75%*	66%*	65%*	90%*	80%*	91%*	0%*
	Average	29	77%*	78%*	69%*	73%*	90%*	71%*	78%*	0%*
	Secure Retired	16	87%*	76%*	44%*	44%*	95%*	56%*	82%*	0%*
Willingness To Take Risks	Secure High Income	60	79%	75%	48%	47%	83%	54%	69%	0%
	Low (0-4)	27	90%*	78%*	75%*	74%*	91%*	70%*	93%*	0%*
	Medium (5-7)	56	81%	76%	53%	57%	89%	63%	80%	0%
Technology Adopter	High (8-10)	44	86%	79%	48%	51%	87%	68%	76%	0%
	Innovator	13	91%*	72%*	63%*	65%*	86%*	72%*	86%*	0%*
	Early Adopter	32	92%	77%	60%	60%	87%	71%	83%	0%
	Early Majority	49	77%	84%	51%	55%	91%	60%	82%	0%
	Late Majority	26	88%*	77%*	59%*	61%*	91%*	74%*	78%*	0%*
	Laggard	7	85%**	48%**	62%**	62%**	76%**	48%**	85%**	0%**

*Small sample size (n<30). **Extremely small sample size (n<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		478	32%	10%	47%
Location	Metro	358	31%	10%	49%
	Regional	120	36%	12%	41%
Gas (Dual Fuel)	Yes	352	32%	11%	48%
	No (Electricity only)	104	39%	9%	45%
Age Group	18 - 34	149	28%	9%	52%
	35 - 54	195	30%	8%	54%
	55+	134	39%	14%	37%
Home Ownership	Owners	318	31%	10%	50%
	Renters / Other	160	35%	10%	42%
Household Income (Annual)	Low (<\$50k)	139	42%	10%	39%
	Medium (\$50k -<\$100k)	153	26%	15%	50%
	High (>\$100k)	113	27%	6%	60%
Employment	Working FT / PT / Casual	288	31%	7%	53%
	Retired	90	38%	14%	35%
	Other	106	30%	14%	46%
Solar	Solar PVs	87	33%	9%	52%
	No Solar PVs	391	32%	10%	46%
	Solar hot water	50	38%	9%	47%
	Neither	353	31%	11%	48%
Switched Energy Company or Plan	In the past 12 months	139	19%	25%	53%
	1 to 5 years ago	121	26%	8%	56%
	NETT switched (Last 5 yrs)	260	22%	17%	54%
	Have not switched at all	218	44%	2%	39%
Approached by Energy Company (Last 12 Months)	Yes	214	26%	11%	57%
	No	211	37%	10%	42%
Actively Investigated Options	Yes	148	19%	16%	62%
	No	310	40%	8%	41%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	43%	9%	39%
	Medium (\$300 to \$499)	136	28%	13%	50%
	High (\$500+)	110	19%	11%	63%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	39%	11%	44%
	Medium (\$200 to \$300)	80	38%	6%	45%
	High (\$300+)	101	18%	14%	58%
Customer Segments	Vulnerable Low Income	59	37%	11%	45%
	Vulnerable Mid Income	33	18%	10%	68%
	Vulnerable High Income	24	11%*	9%*	76%*
	Low Income Retired	50	45%	11%	29%
	Average	87	35%	11%	43%
	Secure Retired	38	30%	17%	42%
	Secure High Income	187	31%	8%	50%
Willingness To Take Risks	Low (0-4)	93	44%	8%	39%
	Medium (5-7)	168	33%	12%	42%
	High (8-10)	117	19%	9%	58%
Technology Adopter	Innovator	49	14%	6%	63%
	Early Adopter	79	24%	9%	57%
	Early Majority	142	30%	15%	45%
	Late Majority	70	36%	10%	40%
	Laggard	43	62%	0%	21%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		478	73%
Location	Metro	358	75%
	Regional	120	70%
Gas (Dual Fuel)	Yes	352	76%
	No (Electricity only)	104	70%
Age Group	18 - 34	149	80%
	35 - 54	195	65%
	55+	134	75%
Home Ownership	Owners	318	77%
	Renters / Other	160	66%
Household Income (Annual)	Low (<\$50k)	139	71%
	Medium (\$50k -<\$100k)	153	78%
	High (>\$100k)	113	76%
Employment	Working FT / PT / Casual	288	75%
	Retired	90	74%
	Other	106	68%
Solar	Solar PVs	87	82%
	No Solar PVs	391	71%
	Solar hot water	50	85%
	Neither	353	71%
Switched Energy Company or Plan	In the past 12 months	139	74%
	1 to 5 years ago	121	75%
	NETT switched (Last 5 yrs)	260	75%
	Have not switched at all	218	72%
Approached by Energy Company (Last 12 Months)	Yes	214	73%
	No	211	74%
Actively Investigated Options	Yes	148	71%
	No	310	75%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	80%
	Medium (\$300 to \$499)	136	70%
	High (\$500+)	110	72%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	79%
	Medium (\$200 to \$300)	80	73%
	High (\$300+)	101	77%
Customer Segments	Vulnerable Low Income	59	70%
	Vulnerable Mid Income	33	54%
	Vulnerable High Income	24	100%*
	Low Income Retired	50	78%
	Average	87	73%
	Secure Retired	38	70%
	Secure High Income	187	74%
Willingness To Take Risks	Low (0-4)	93	67%
	Medium (5-7)	168	75%
	High (8-10)	117	77%
Technology Adopter	Innovator	49	85%
	Early Adopter	79	68%
	Early Majority	142	71%
	Late Majority	70	79%
	Laggard	43	66%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q7. How satisfied are you with your current gas company?			
		(n=)	Satisfied
Total		352	74%
Location	Metro	282	75%
	Regional	70	72%
Gas (Dual Fuel)	Yes	352	74%
	No (Electricity only)	0	-
Age Group	18 - 34	96	85%
	35 - 54	152	64%
	55+	104	74%
Home Ownership	Owners	251	77%
	Renters / Other	101	65%
Household Income (Annual)	Low (<\$50k)	99	69%
	Medium (\$50k -<\$100k)	118	82%
	High (>\$100k)	86	76%
Employment	Working FT / PT / Casual	211	78%
	Retired	71	70%
	Other	74	69%
Solar	Solar PVs	70	79%
	No Solar PVs	282	73%
	Solar hot water	37	82%
	Neither	259	72%
Switched Energy Company or Plan	In the past 12 months	109	70%
	1 to 5 years ago	89	77%
	NETT switched (Last 5 yrs)	198	74%
	Have not switched at all	154	74%
Approached by Energy Company (Last 12 Months)	Yes	173	73%
	No	143	74%
Actively Investigated Options	Yes	114	64%
	No	226	79%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	138	78%
	Medium (\$300 to \$499)	113	71%
	High (\$500+)	66	72%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	77%
	Medium (\$200 to \$300)	80	69%
	High (\$300+)	101	75%
Customer Segments	Vulnerable Low Income	41	68%
	Vulnerable Mid Income	24	61%*
	Vulnerable High Income	18	100%*
	Low Income Retired	39	71%
	Average	61	73%
	Secure Retired	31	67%
	Secure High Income	138	78%
Willingness To Take Risks	Low (0-4)	74	71%
	Medium (5-7)	120	77%
	High (8-10)	101	73%
Technology Adopter	Innovator	40	93%
	Early Adopter	70	66%
	Early Majority	105	71%
	Late Majority	52	77%
	Laggard	30	70%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		478	70%
Location	Metro	358	70%
	Regional	120	69%
Gas (Dual Fuel)	Yes	352	71%
	No (Electricity only)	104	71%
Age Group	18 - 34	149	75%
	35 - 54	195	61%
	55+	134	74%
Home Ownership	Owners	318	75%
	Renters / Other	160	61%
Household Income (Annual)	Low (<\$50k)	139	69%
	Medium (\$50k -<\$100k)	153	74%
	High (>\$100k)	113	70%
Employment	Working FT / PT / Casual	288	70%
	Retired	90	75%
	Other	106	66%
Solar	Solar PVs	87	84%
	No Solar PVs	391	67%
	Solar hot water	50	83%
	Neither	353	67%
Switched Energy Company or Plan	In the past 12 months	139	69%
	1 to 5 years ago	121	72%
	NETT switched (Last 5 yrs)	260	71%
	Have not switched at all	218	70%
Approached by Energy Company (Last 12 Months)	Yes	214	70%
	No	211	73%
Actively Investigated Options	Yes	148	69%
	No	310	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	77%
	Medium (\$300 to \$499)	136	68%
	High (\$500+)	110	66%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	77%
	Medium (\$200 to \$300)	80	69%
	High (\$300+)	101	69%
Customer Segments	Vulnerable Low Income	59	67%
	Vulnerable Mid Income	33	45%
	Vulnerable High Income	24	87%*
	Low Income Retired	50	74%
	Average	87	69%
	Secure Retired	38	76%
	Secure High Income	187	71%
Willingness To Take Risks	Low (0-4)	93	64%
	Medium (5-7)	168	69%
	High (8-10)	117	84%
Technology Adopter	Innovator	49	87%
	Early Adopter	79	75%
	Early Majority	142	72%
	Late Majority	70	66%
	Laggard	43	57%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q8. How would you rate the overall quality of customer service provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		352	66%
Location	Metro	282	67%
	Regional	70	62%
Gas (Dual Fuel)	Yes	352	66%
	No (Electricity only)	0	-
Age Group	18 - 34	96	76%
	35 - 54	152	57%
	55+	104	66%
Home Ownership	Owners	251	70%
	Renters / Other	101	55%
Household Income (Annual)	Low (<\$50k)	99	65%
	Medium (\$50k -<\$100k)	118	69%
	High (>\$100k)	86	68%
Employment	Working FT / PT / Casual	211	66%
	Retired	71	67%
	Other	74	63%
Solar	Solar PVs	70	74%
	No Solar PVs	282	64%
	Solar hot water	37	72%
	Neither	259	63%
Switched Energy Company or Plan	In the past 12 months	109	62%
	1 to 5 years ago	89	70%
	NETT switched (Last 5 yrs)	198	65%
	Have not switched at all	154	66%
Approached by Energy Company (Last 12 Months)	Yes	173	63%
	No	143	70%
Actively Investigated Options	Yes	114	56%
	No	226	71%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	138	72%
	Medium (\$300 to \$499)	113	66%
	High (\$500+)	66	59%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	73%
	Medium (\$200 to \$300)	80	66%
	High (\$300+)	101	63%
Customer Segments	Vulnerable Low Income	41	60%
	Vulnerable Mid Income	24	32%*
	Vulnerable High Income	18	94%*
	Low Income Retired	39	64%
	Average	61	70%
	Secure Retired	31	69%
	Secure High Income	138	68%
Willingness To Take Risks	Low (0-4)	74	57%
	Medium (5-7)	120	67%
	High (8-10)	101	76%
Technology Adopter	Innovator	40	87%
	Early Adopter	70	68%
	Early Majority	105	65%
	Late Majority	52	59%
	Laggard	30	61%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		478	64%
Location	Metro	358	65%
	Regional	120	63%
Gas (Dual Fuel)	Yes	352	67%
	No (Electricity only)	104	60%
Age Group	18 - 34	149	74%
	35 - 54	195	49%
	55+	134	70%
Home Ownership	Owners	318	69%
	Renters / Other	160	55%
Household Income (Annual)	Low (<\$50k)	139	63%
	Medium (\$50k -<\$100k)	153	68%
	High (>\$100k)	113	66%
Employment	Working FT / PT / Casual	288	64%
	Retired	90	71%
	Other	106	59%
Solar	Solar PVs	87	72%
	No Solar PVs	391	62%
	Solar hot water	50	75%
	Neither	353	62%
Switched Energy Company or Plan	In the past 12 months	139	63%
	1 to 5 years ago	121	65%
	NETT switched (Last 5 yrs)	260	64%
	Have not switched at all	218	65%
Approached by Energy Company (Last 12 Months)	Yes	214	63%
	No	211	67%
Actively Investigated Options	Yes	148	58%
	No	310	69%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	74%
	Medium (\$300 to \$499)	136	60%
	High (\$500+)	110	61%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	71%
	Medium (\$200 to \$300)	80	66%
	High (\$300+)	101	67%
Customer Segments	Vulnerable Low Income	59	55%
	Vulnerable Mid Income	33	40%
	Vulnerable High Income	24	74%*
	Low Income Retired	50	70%
	Average	87	65%
	Secure Retired	38	71%
	Secure High Income	187	66%
Willingness To Take Risks	Low (0-4)	93	57%
	Medium (5-7)	168	67%
	High (8-10)	117	74%
Technology Adopter	Innovator	49	82%
	Early Adopter	79	63%
	Early Majority	142	64%
	Late Majority	70	65%
	Laggard	43	61%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q9. How would you rate the overall value for money of the products and services provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		352	66%
Location	Metro	282	66%
	Regional	70	67%
Gas (Dual Fuel)	Yes	352	66%
	No (Electricity only)	0	-
Age Group	18 - 34	96	83%
	35 - 54	152	51%
	55+	104	68%
Home Ownership	Owners	251	71%
	Renters / Other	101	54%
Household Income (Annual)	Low (<\$50k)	99	65%
	Medium (\$50k -<\$100k)	118	70%
	High (>\$100k)	86	69%
Employment	Working FT / PT / Casual	211	68%
	Retired	71	66%
	Other	74	62%
Solar	Solar PVs	70	75%
	No Solar PVs	282	64%
	Solar hot water	37	78%
	Neither	259	63%
Switched Energy Company or Plan	In the past 12 months	109	59%
	1 to 5 years ago	89	71%
	NETT switched (Last 5 yrs)	198	64%
	Have not switched at all	154	69%
Approached by Energy Company (Last 12 Months)	Yes	173	66%
	No	143	67%
Actively Investigated Options	Yes	114	56%
	No	226	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	138	70%
	Medium (\$300 to \$499)	113	64%
	High (\$500+)	66	70%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	67%
	Medium (\$200 to \$300)	80	67%
	High (\$300+)	101	70%
Customer Segments	Vulnerable Low Income	41	67%
	Vulnerable Mid Income	24	46%*
	Vulnerable High Income	18	100%*
	Low Income Retired	39	64%
	Average	61	63%
	Secure Retired	31	67%
	Secure High Income	138	67%
Willingness To Take Risks	Low (0-4)	74	59%
	Medium (5-7)	120	70%
	High (8-10)	101	77%
Technology Adopter	Innovator	40	92%
	Early Adopter	70	65%
	Early Majority	105	68%
	Late Majority	52	63%
	Laggard	30	59%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		478	69%	12%
Location	Metro	358	69%	10%
	Regional	120	66%	17%
Gas (Dual Fuel)	Yes	352	69%	12%
	No (Electricity only)	104	71%	13%
Age Group	18 - 34	149	76%	5%
	35 - 54	195	65%	14%
	55+	134	65%	16%
Home Ownership	Owners	318	71%	12%
	Renters / Other	160	63%	11%
Household Income (Annual)	Low (<\$50k)	139	61%	14%
	Medium (\$50k -<\$100k)	153	76%	9%
	High (>\$100k)	113	70%	11%
Employment	Working FT / PT / Casual	288	73%	11%
	Retired	90	60%	13%
	Other	106	67%	11%
Solar	Solar PVs	87	75%	9%
	No Solar PVs	391	67%	12%
	Solar hot water	50	77%	5%
	Neither	353	68%	13%
Switched Energy Company or Plan	In the past 12 months	139	67%	16%
	1 to 5 years ago	121	68%	15%
	NETT switched (Last 5 yrs)	260	68%	15%
	Have not switched at all	218	69%	7%
Approached by Energy Company (Last 12 Months)	Yes	214	69%	14%
	No	211	70%	12%
Actively Investigated Options	Yes	148	69%	18%
	No	310	70%	9%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	76%	8%
	Medium (\$300 to \$499)	136	66%	13%
	High (\$500+)	110	67%	15%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	72%	12%
	Medium (\$200 to \$300)	80	70%	12%
	High (\$300+)	101	67%	12%
Customer Segments	Vulnerable Low Income	59	64%	17%
	Vulnerable Mid Income	33	58%	17%
	Vulnerable High Income	24	95%*	0%*
	Low Income Retired	50	52%	18%
	Average	87	70%	11%
	Secure Retired	38	71%	8%
	Secure High Income	187	72%	9%
Willingness To Take Risks	Low (0-4)	93	52%	19%
	Medium (5-7)	168	71%	9%
	High (8-10)	117	78%	8%
Technology Adopter	Innovator	49	83%	0%
	Early Adopter	79	74%	13%
	Early Majority	142	65%	10%
	Late Majority	70	67%	16%
	Laggard	43	51%	15%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		250	78%	2%
Location	Metro	181	80%	2%
	Regional	69	74%	3%
Gas (Dual Fuel)	Yes	188	80%	3%
	No (Electricity only)	53	73%	2%
Age Group	18 - 34	62	76%	0%
	35 - 54	109	80%	3%
	55+	79	78%	4%
Home Ownership	Owners	168	82%	4%
	Renters / Other	82	71%	0%
Household Income (Annual)	Low (<\$50k)	78	74%	3%
	Medium (\$50k -<\$100k)	80	85%	4%
	High (>\$100k)	56	74%	0%
Employment	Working FT / PT / Casual	146	79%	3%
	Retired	51	80%	2%
	Other	56	75%	2%
Solar	Solar PVs	45	77%	1%
	No Solar PVs	205	78%	3%
	Solar hot water	22	74%*	0%*
	Neither	194	78%	3%
Switched Energy Company or Plan	In the past 12 months	131	78%	3%
	1 to 5 years ago	119	79%	1%
	NETT switched (Last 5 yrs)	250	78%	2%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	136	78%	2%
	No	95	78%	3%
Actively Investigated Options	Yes	99	78%	5%
	No	145	78%	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	99	84%	2%
	Medium (\$300 to \$499)	82	76%	1%
	High (\$500+)	49	75%	5%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	76	83%	1%
	Medium (\$200 to \$300)	39	79%	4%
	High (\$300+)	57	80%	4%
Customer Segments	Vulnerable Low Income	39	71%	3%
	Vulnerable Mid Income	20	71%*	0%*
	Vulnerable High Income	8	61%**	0%**
	Low Income Retired	29	78%*	0%*
	Average	45	88%	2%
	Secure Retired	21	85%*	6%*
	Secure High Income	88	78%	3%
Willingness To Take Risks	Low (0-4)	41	66%	3%
	Medium (5-7)	86	81%	2%
	High (8-10)	63	73%	2%
Technology Adopter	Innovator	21	78%*	7%*
	Early Adopter	45	70%	3%
	Early Majority	73	83%	0%
	Late Majority	35	70%	4%
	Laggard	16	58%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		250	74%	8%
Location	Metro	181	71%	10%
	Regional	69	83%	3%
Gas (Dual Fuel)	Yes	188	75%	9%
	No (Electricity only)	53	72%	8%
Age Group	18 - 34	62	71%	5%
	35 - 54	109	73%	10%
	55+	79	77%	9%
Home Ownership	Owners	168	78%	9%
	Renters / Other	82	66%	7%
Household Income (Annual)	Low (<\$50k)	78	71%	4%
	Medium (\$50k -<\$100k)	80	80%	9%
	High (>\$100k)	56	72%	9%
Employment	Working FT / PT / Casual	146	72%	9%
	Retired	51	79%	8%
	Other	56	73%	6%
Solar	Solar PVs	45	75%	9%
	No Solar PVs	205	74%	8%
	Solar hot water	22	80%*	6%*
	Neither	194	74%	8%
Switched Energy Company or Plan	In the past 12 months	131	75%	8%
	1 to 5 years ago	119	73%	8%
	NETT switched (Last 5 yrs)	250	74%	8%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	136	75%	11%
	No	95	74%	6%
Actively Investigated Options	Yes	99	73%	12%
	No	145	76%	5%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	99	83%	4%
	Medium (\$300 to \$499)	82	70%	11%
	High (\$500+)	49	73%	9%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	76	82%	3%
	Medium (\$200 to \$300)	39	69%	22%
	High (\$300+)	57	74%	6%
Customer Segments	Vulnerable Low Income	39	73%	6%
	Vulnerable Mid Income	20	68%*	0%*
	Vulnerable High Income	8	60%**	0%**
	Low Income Retired	29	75%*	6%*
	Average	45	80%	13%
	Secure Retired	21	86%*	10%*
	Secure High Income	88	70%	10%
Willingness To Take Risks	Low (0-4)	41	72%	7%
	Medium (5-7)	86	76%	7%
	High (8-10)	63	65%	11%
Technology Adopter	Innovator	21	71%*	15%*
	Early Adopter	45	64%	8%
	Early Majority	73	81%	4%
	Late Majority	35	68%	12%
	Laggard	16	60%*	10%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		160	82%	4%
Location	Metro	140	84%	3%
	Regional	20	71%*	9%*
Gas (Dual Fuel)	Yes	160	82%	4%
	No (Electricity only)	0	-	-
Age Group	18 - 34	31	84%	0%
	35 - 54	73	81%	6%
	55+	56	82%	3%
Home Ownership	Owners	115	84%	3%
	Renters / Other	45	78%	5%
Household Income (Annual)	Low (<\$50k)	43	76%	7%
	Medium (\$50k -<\$100k)	55	89%	0%
	High (>\$100k)	36	84%	2%
Employment	Working FT / PT / Casual	96	84%	2%
	Retired	36	81%	6%
	Other	30	81%	7%
Solar	Solar PVs	26	78%*	3%*
	No Solar PVs	134	83%	4%
	Solar hot water	9	85%**	0%**
	Neither	128	82%	4%
Switched Energy Company or Plan	In the past 12 months	92	81%	6%
	1 to 5 years ago	68	83%	0%
	NETT switched (Last 5 yrs)	160	82%	4%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	88	82%	5%
	No	59	82%	3%
Actively Investigated Options	Yes	64	76%	8%
	No	92	86%	1%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	61	84%	3%
	Medium (\$300 to \$499)	59	82%	3%
	High (\$500+)	28	83%*	5%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	65	88%	1%
	Medium (\$200 to \$300)	30	79%	9%
	High (\$300+)	53	81%	3%
Customer Segments	Vulnerable Low Income	19	82%*	5%*
	Vulnerable Mid Income	12	59%*	0%*
	Vulnerable High Income	4	100%**	0%**
	Low Income Retired	20	75%*	4%*
	Average	29	89%*	3%*
	Secure Retired	16	87%*	7%*
	Secure High Income	60	83%	2%
Willingness To Take Risks	Low (0-4)	27	76%*	7%*
	Medium (5-7)	56	85%	2%
	High (8-10)	44	76%	3%
Technology Adopter	Innovator	13	94%*	0%*
	Early Adopter	32	75%	2%
	Early Majority	49	83%	1%
	Late Majority	26	79%*	8%*
	Laggard	7	63%**	14%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		160	79%	5%
Location	Metro	140	80%	5%
	Regional	20	76%*	5%*
Gas (Dual Fuel)	Yes	160	79%	5%
	No (Electricity only)	0	-	-
Age Group	18 - 34	31	81%	6%
	35 - 54	73	85%	4%
	55+	56	73%	5%
Home Ownership	Owners	115	78%	6%
	Renters / Other	45	83%	2%
Household Income (Annual)	Low (<\$50k)	43	74%	5%
	Medium (\$50k -<\$100k)	55	83%	6%
	High (>\$100k)	36	85%	5%
Employment	Working FT / PT / Casual	96	80%	4%
	Retired	36	72%	6%
	Other	30	87%	7%
Solar	Solar PVs	26	69%*	6%*
	No Solar PVs	134	81%	5%
	Solar hot water	9	85%**	0%**
	Neither	128	80%	5%
Switched Energy Company or Plan	In the past 12 months	92	79%	5%
	1 to 5 years ago	68	79%	5%
	NETT switched (Last 5 yrs)	160	79%	5%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	88	83%	5%
	No	59	75%	5%
Actively Investigated Options	Yes	64	74%	9%
	No	92	83%	3%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	61	84%	2%
	Medium (\$300 to \$499)	59	78%	7%
	High (\$500+)	28	73%*	8%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	65	84%	1%
	Medium (\$200 to \$300)	30	78%	13%
	High (\$300+)	53	75%	4%
Customer Segments	Vulnerable Low Income	19	82%*	5%*
	Vulnerable Mid Income	12	63%*	0%*
	Vulnerable High Income	4	100%**	0%**
	Low Income Retired	20	65%*	4%*
	Average	29	92%*	3%*
	Secure Retired	16	82%*	7%*
	Secure High Income	60	78%	6%
Willingness To Take Risks	Low (0-4)	27	75%*	6%*
	Medium (5-7)	56	83%	6%
	High (8-10)	44	67%	4%
Technology Adopter	Innovator	13	85%*	9%*
	Early Adopter	32	71%	2%
	Early Majority	49	77%	4%
	Late Majority	26	74%*	8%*
	Laggard	7	81%**	9%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		478	66%
Location	Metro	358	68%
	Regional	120	63%
Gas (Dual Fuel)	Yes	352	66%
	No (Electricity only)	104	70%
Age Group	18 - 34	149	73%
	35 - 54	195	65%
	55+	134	62%
Home Ownership	Owners	318	65%
	Renters / Other	160	69%
Household Income (Annual)	Low (<\$50k)	139	65%
	Medium (\$50k -<\$100k)	153	71%
	High (>\$100k)	113	72%
Employment	Working FT / PT / Casual	288	71%
	Retired	90	58%
	Other	106	64%
Solar	Solar PVs	87	70%
	No Solar PVs	391	65%
	Solar hot water	50	74%
	Neither	353	67%
Switched Energy Company or Plan	In the past 12 months	139	65%
	1 to 5 years ago	121	69%
	NETT switched (Last 5 yrs)	260	67%
	Have not switched at all	218	66%
Approached by Energy Company (Last 12 Months)	Yes	214	64%
	No	211	70%
Actively Investigated Options	Yes	148	69%
	No	310	67%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	72%
	Medium (\$300 to \$499)	136	63%
	High (\$500+)	110	68%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	70%
	Medium (\$200 to \$300)	80	62%
	High (\$300+)	101	72%
Customer Segments	Vulnerable Low Income	59	67%
	Vulnerable Mid Income	33	63%
	Vulnerable High Income	24	79%*
	Low Income Retired	50	56%
	Average	87	66%
	Secure Retired	38	60%
	Secure High Income	187	71%
Willingness To Take Risks	Low (0-4)	93	55%
	Medium (5-7)	168	65%
	High (8-10)	117	76%
Technology Adopter	Innovator	49	87%
	Early Adopter	79	61%
	Early Majority	142	65%
	Late Majority	70	65%
	Laggard	43	49%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		478	66%
Location	Metro	358	67%
	Regional	120	66%
Gas (Dual Fuel)	Yes	352	68%
	No (Electricity only)	104	65%
Age Group	18 - 34	149	71%
	35 - 54	195	59%
	55+	134	69%
Home Ownership	Owners	318	68%
	Renters / Other	160	64%
Household Income (Annual)	Low (<\$50k)	139	61%
	Medium (\$50k -<\$100k)	153	75%
	High (>\$100k)	113	69%
Employment	Working FT / PT / Casual	288	69%
	Retired	90	67%
	Other	106	60%
Solar	Solar PVs	87	77%
	No Solar PVs	391	64%
	Solar hot water	50	75%
	Neither	353	64%
Switched Energy Company or Plan	In the past 12 months	139	64%
	1 to 5 years ago	121	73%
	NETT switched (Last 5 yrs)	260	68%
	Have not switched at all	218	65%
Approached by Energy Company (Last 12 Months)	Yes	214	65%
	No	211	70%
Actively Investigated Options	Yes	148	68%
	No	310	67%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	71%
	Medium (\$300 to \$499)	136	69%
	High (\$500+)	110	63%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	68%
	Medium (\$200 to \$300)	80	68%
	High (\$300+)	101	72%
Customer Segments	Vulnerable Low Income	59	58%
	Vulnerable Mid Income	33	60%
	Vulnerable High Income	24	82%*
	Low Income Retired	50	71%
	Average	87	63%
	Secure Retired	38	61%
	Secure High Income	187	70%
Willingness To Take Risks	Low (0-4)	93	55%
	Medium (5-7)	168	65%
	High (8-10)	117	79%
Technology Adopter	Innovator	49	84%
	Early Adopter	79	73%
	Early Majority	142	64%
	Late Majority	70	64%
	Laggard	43	45%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		478	78%	63%	50%	49%	43%	38%	38%
Location	Metro	358	77%	62%	50%	50%	43%	37%	39%
	Regional	120	83%	64%	50%	49%	41%	40%	34%
Gas (Dual Fuel)	Yes	352	79%	63%	51%	48%	43%	37%	36%
	No (Electricity only)	104	80%	64%	46%	55%	44%	44%	46%
Age Group	18 - 34	149	74%	67%	46%	53%	51%	44%	48%
	35 - 54	195	79%	59%	49%	48%	40%	36%	41%
	55+	134	83%	61%	53%	47%	37%	34%	24%
Home Ownership	Owners	318	82%	65%	52%	51%	43%	39%	36%
	Renters / Other	160	71%	58%	45%	46%	42%	36%	40%
Household Income (Annual)	Low (<\$50k)	139	76%	64%	51%	49%	39%	37%	31%
	Medium (\$50k -<\$100k)	153	81%	62%	53%	46%	40%	40%	44%
	High (>\$100k)	113	80%	65%	41%	56%	51%	42%	43%
Employment	Working FT / PT / Casual	288	78%	63%	50%	51%	46%	40%	46%
	Retired	90	81%	59%	51%	49%	42%	37%	22%
	Other	106	77%	65%	46%	45%	38%	33%	29%
Solar	Solar PVs	87	79%	61%	58%	49%	42%	39%	34%
	No Solar PVs	391	78%	63%	48%	49%	43%	37%	38%
	Solar hot water	50	83%	63%	51%	53%	51%	33%	34%
	Neither	353	80%	64%	49%	51%	43%	39%	39%
Switched Energy Company or Plan	In the past 12 months	139	83%	62%	44%	43%	35%	29%	29%
	1 to 5 years ago	121	85%	66%	49%	45%	36%	30%	31%
	NETT switched (Last 5 yrs)	260	84%	64%	46%	44%	35%	30%	30%
	Have not switched at all	218	71%	61%	53%	56%	52%	48%	47%
Approached by Energy Company (Last 12 Months)	Yes	214	85%	69%	54%	52%	46%	39%	36%
	No	211	75%	59%	48%	49%	43%	37%	40%
Actively Investigated Options	Yes	148	87%	59%	51%	44%	34%	28%	27%
	No	310	76%	66%	51%	54%	48%	44%	44%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	77%	61%	51%	48%	42%	41%	36%
	Medium (\$300 to \$499)	136	82%	63%	49%	50%	38%	32%	37%
	High (\$500+)	110	86%	67%	52%	55%	52%	43%	46%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	78%	59%	52%	47%	38%	35%	35%
	Medium (\$200 to \$300)	80	85%	72%	57%	58%	45%	41%	41%
	High (\$300+)	101	82%	62%	48%	43%	51%	39%	35%
Customer Segments	Vulnerable Low Income	59	77%	69%	58%	49%	35%	36%	31%
	Vulnerable Mid Income	33	76%	58%	40%	39%	45%	29%	40%
	Vulnerable High Income	24	87%*	87%*	66%*	63%*	75%*	68%*	61%*
	Low Income Retired	50	79%	66%	59%	52%	50%	35%	23%
	Average	87	77%	58%	42%	45%	36%	31%	36%
	Secure Retired	38	85%	50%	41%	45%	32%	40%	21%
Willingness To Take Risks	Secure High Income	187	77%	63%	49%	52%	45%	40%	46%
	Low (0-4)	93	68%	62%	52%	52%	41%	32%	36%
	Medium (5-7)	168	78%	58%	41%	41%	35%	31%	30%
	High (8-10)	117	82%	67%	54%	45%	44%	41%	34%
Technology Adopter	Innovator	49	76%	76%	65%	55%	57%	51%	39%
	Early Adopter	79	79%	57%	46%	43%	37%	29%	24%
	Early Majority	142	75%	57%	41%	43%	33%	26%	26%
	Late Majority	70	83%	63%	42%	42%	33%	38%	42%
	Laggard	43	60%	60%	57%	48%	51%	40%	43%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		478	4%	12%	15%	24%	23%	31%	31%
Location	Metro	358	4%	12%	14%	23%	22%	29%	30%
	Regional	120	3%	14%	18%	28%	25%	37%	34%
Gas (Dual Fuel)	Yes	352	4%	13%	15%	24%	24%	31%	33%
	No (Electricity only)	104	4%	13%	18%	27%	21%	32%	27%
Age Group	18 - 34	149	3%	7%	9%	18%	16%	24%	17%
	35 - 54	195	3%	16%	18%	24%	25%	37%	29%
	55+	134	5%	15%	17%	30%	27%	33%	47%
Home Ownership	Owners	318	4%	15%	15%	26%	23%	32%	34%
	Renters / Other	160	4%	7%	13%	21%	22%	30%	24%
Household Income (Annual)	Low (<\$50k)	139	6%	9%	15%	24%	23%	32%	31%
	Medium (\$50k -<\$100k)	153	2%	12%	14%	25%	22%	29%	30%
	High (>\$100k)	113	5%	19%	20%	22%	23%	30%	30%
Employment	Working FT / PT / Casual	288	3%	12%	14%	22%	20%	30%	25%
	Retired	90	4%	19%	16%	28%	24%	33%	48%
	Other	106	6%	8%	14%	24%	28%	34%	30%
Solar	Solar PVs	87	5%	17%	11%	28%	24%	28%	38%
	No Solar PVs	391	3%	11%	16%	23%	23%	32%	29%
	Solar hot water	50	0%	13%	6%	23%	20%	30%	28%
	Neither	353	4%	12%	17%	23%	23%	33%	31%
Switched Energy Company or Plan	In the past 12 months	139	5%	17%	20%	31%	31%	47%	44%
	1 to 5 years ago	121	3%	13%	21%	29%	32%	39%	41%
	NETT switched (Last 5 yrs)	260	4%	15%	20%	30%	31%	43%	43%
	Have not switched at all	218	3%	9%	8%	17%	13%	17%	17%
Approached by Energy Company (Last 12 Months)	Yes	214	4%	16%	18%	27%	26%	39%	38%
	No	211	4%	11%	14%	25%	23%	26%	28%
Actively Investigated Options	Yes	148	5%	22%	20%	35%	34%	48%	48%
	No	310	3%	8%	12%	20%	18%	24%	24%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	181	6%	14%	16%	23%	26%	29%	37%
	Medium (\$300 to \$499)	136	3%	11%	12%	24%	23%	37%	28%
	High (\$500+)	110	2%	15%	17%	24%	22%	30%	30%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	137	3%	17%	15%	24%	28%	31%	31%
	Medium (\$200 to \$300)	80	6%	9%	12%	23%	26%	30%	32%
	High (\$300+)	101	3%	14%	17%	26%	20%	33%	38%
Customer Segments	Vulnerable Low Income	59	7%	9%	15%	25%	29%	40%	35%
	Vulnerable Mid Income	33	0%	4%	8%	32%	26%	39%	22%
	Vulnerable High Income	24	9%*	9%*	25%*	13%*	9%*	16%*	9%*
	Low Income Retired	50	6%	14%	16%	26%	20%	38%	47%
	Average	87	2%	14%	16%	27%	24%	24%	29%
	Secure Retired	38	0%	26%	17%	30%	29%	27%	50%
Willingness To Take Risks	Secure High Income	187	3%	11%	13%	20%	21%	31%	25%
	Low (0-4)	93	4%	13%	17%	25%	23%	35%	34%
	Medium (5-7)	168	5%	8%	10%	22%	21%	28%	28%
Technology Adopter	High (8-10)	117	4%	11%	12%	27%	25%	30%	34%
	Innovator	49	9%	12%	18%	26%	24%	31%	34%
	Early Adopter	79	3%	15%	14%	24%	24%	34%	37%
	Early Majority	142	3%	9%	11%	25%	25%	29%	30%
	Late Majority	70	2%	7%	15%	25%	26%	36%	30%
	Laggard	43	8%	8%	5%	16%	5%	19%	20%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Appendix Eight: Tasmania Tables

NB: Tables with total base size of n=<30 are not displayed.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		200	13%
Location	Metro	85	10%
	Regional	115	15%
Gas (Dual Fuel)	Yes	24	32%*
	No (Electricity only)	174	11%
Age Group	18 - 34	37	32%
	35 - 54	83	10%
	55+	80	9%
Home Ownership	Owners	146	11%
	Renters / Other	54	22%
Household Income (Annual)	Low (<\$50k)	85	8%
	Medium (\$50k -<\$100k)	58	17%
	High (>\$100k)	31	12%
Employment	Working FT / PT / Casual	104	18%
	Retired	62	8%
	Other	36	13%
Solar	Solar PVs	41	12%
	No Solar PVs	159	14%
	Solar hot water	13	31%*
	Neither	155	13%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	13%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	30%
	Medium (\$300 to \$499)	72	11%
	High (\$500+)	69	9%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	37%**
	Medium (\$200 to \$300)	5	33%**
	High (\$300+)	9	22%**
Customer Segments	Vulnerable Low Income	21	10%*
	Vulnerable Mid Income	8	28%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	12%
	Average	47	11%
	Secure Retired	21	0%*
	Secure High Income	60	22%
Willingness To Take Risks	Low (0-4)	42	4%
	Medium (5-7)	83	11%
	High (8-10)	26	16%*
Technology Adopter	Innovator	12	19%*
	Early Adopter	29	18%*
	Early Majority	69	6%
	Late Majority	29	4%*
	Laggard	13	19%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		200	15%
Location	Metro	85	18%
	Regional	115	14%
Gas (Dual Fuel)	Yes	24	31%*
	No (Electricity only)	174	14%
Age Group	18 - 34	37	32%
	35 - 54	83	9%
	55+	80	13%
Home Ownership	Owners	146	15%
	Renters / Other	54	17%
Household Income (Annual)	Low (<\$50k)	85	8%
	Medium (\$50k -<\$100k)	58	21%
	High (>\$100k)	31	9%
Employment	Working FT / PT / Casual	104	19%
	Retired	62	13%
	Other	36	12%
Solar	Solar PVs	41	10%
	No Solar PVs	159	17%
	Solar hot water	13	29%*
	Neither	155	16%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	15%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	25%
	Medium (\$300 to \$499)	72	16%
	High (\$500+)	69	10%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	37%**
	Medium (\$200 to \$300)	5	0%**
	High (\$300+)	9	45%**
Customer Segments	Vulnerable Low Income	21	9%*
	Vulnerable Mid Income	8	10%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	12%
	Average	47	11%
	Secure Retired	21	17%*
	Secure High Income	60	24%
Willingness To Take Risks	Low (0-4)	42	7%
	Medium (5-7)	83	7%
	High (8-10)	26	19%*
Technology Adopter	Innovator	12	26%*
	Early Adopter	29	9%*
	Early Majority	69	9%
	Late Majority	29	0%*
	Laggard	13	19%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		200	24%	1%	38%
Location	Metro	85	17%	0%	45%
	Regional	115	27%	1%	34%
Gas (Dual Fuel)	Yes	24	18%*	6%*	63%*
	No (Electricity only)	174	25%	0%	34%
Age Group	18 - 34	37	14%	3%	61%
	35 - 54	83	21%	0%	39%
	55+	80	30%	0%	28%
Home Ownership	Owners	146	24%	0%	40%
	Renters / Other	54	22%	2%	32%
Household Income (Annual)	Low (<\$50k)	85	28%	0%	23%
	Medium (\$50k -<\$100k)	58	22%	2%	50%
	High (>\$100k)	31	6%	0%	59%
Employment	Working FT / PT / Casual	104	13%	0%	55%
	Retired	62	41%	0%	21%
	Other	36	16%	3%	30%
Solar	Solar PVs	41	32%	0%	39%
	No Solar PVs	159	22%	1%	37%
	Solar hot water	13	43%*	0%*	37%*
	Neither	155	21%	1%	37%
Switched Energy Company or Plan	In the past 12 months	0	-	-	-
	1 to 5 years ago	0	-	-	-
	NETT switched (Last 5 yrs)	0	-	-	-
	Have not switched at all	200	24%	1%	38%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-	-
	No	0	-	-	-
Actively Investigated Options	Yes	0	-	-	-
	No	0	-	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	47%	0%	26%
	Medium (\$300 to \$499)	72	22%	0%	39%
	High (\$500+)	69	11%	2%	45%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	11%**	0%**	73%**
	Medium (\$200 to \$300)	5	26%**	21%**	33%**
	High (\$300+)	9	11%**	0%**	78%**
Customer Segments	Vulnerable Low Income	21	11%*	5%*	28%*
	Vulnerable Mid Income	8	15%**	0%**	45%**
	Vulnerable High Income	2	0%**	0%**	100%**
	Low Income Retired	41	47%	0%	11%
	Average	47	19%	0%	36%
	Secure Retired	21	29%*	0%*	40%*
	Secure High Income	60	12%	0%	64%
Willingness To Take Risks	Low (0-4)	42	12%	0%	29%
	Medium (5-7)	83	16%	2%	39%
	High (8-10)	26	24%*	0%*	50%*
Technology Adopter	Innovator	12	24%*	0%*	59%*
	Early Adopter	29	11%*	4%*	56%*
	Early Majority	69	11%	0%	42%
	Late Majority	29	10%*	0%*	22%*
	Laggard	13	62%*	0%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		200	65%
Location	Metro	85	54%
	Regional	115	70%
Gas (Dual Fuel)	Yes	24	76%*
	No (Electricity only)	174	63%
Age Group	18 - 34	37	65%
	35 - 54	83	59%
	55+	80	69%
Home Ownership	Owners	146	62%
	Renters / Other	54	73%
Household Income (Annual)	Low (<\$50k)	85	73%
	Medium (\$50k -<\$100k)	58	62%
	High (>\$100k)	31	50%
Employment	Working FT / PT / Casual	104	58%
	Retired	62	74%
	Other	36	58%
Solar	Solar PVs	41	66%
	No Solar PVs	159	64%
	Solar hot water	13	77%*
	Neither	155	63%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	65%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	78%
	Medium (\$300 to \$499)	72	75%
	High (\$500+)	69	51%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	89%**
	Medium (\$200 to \$300)	5	80%**
	High (\$300+)	9	64%**
Customer Segments	Vulnerable Low Income	21	63%*
	Vulnerable Mid Income	8	67%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	81%
	Average	47	60%
	Secure Retired	21	62%*
	Secure High Income	60	57%
Willingness To Take Risks	Low (0-4)	42	57%
	Medium (5-7)	83	67%
	High (8-10)	26	68%*
Technology Adopter	Innovator	12	93%*
	Early Adopter	29	52%*
	Early Majority	69	58%
	Late Majority	29	68%*
	Laggard	13	83%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		200	66%
Location	Metro	85	46%
	Regional	115	75%
Gas (Dual Fuel)	Yes	24	70%*
	No (Electricity only)	174	66%
Age Group	18 - 34	37	57%
	35 - 54	83	61%
	55+	80	72%
Home Ownership	Owners	146	64%
	Renters / Other	54	70%
Household Income (Annual)	Low (<\$50k)	85	74%
	Medium (\$50k -<\$100k)	58	63%
	High (>\$100k)	31	49%
Employment	Working FT / PT / Casual	104	55%
	Retired	62	77%
	Other	36	67%
Solar	Solar PVs	41	64%
	No Solar PVs	159	66%
	Solar hot water	13	79%*
	Neither	155	66%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	66%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	72%
	Medium (\$300 to \$499)	72	73%
	High (\$500+)	69	55%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	58%**
	Medium (\$200 to \$300)	5	100%**
	High (\$300+)	9	52%**
Customer Segments	Vulnerable Low Income	21	76%*
	Vulnerable Mid Income	8	67%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	79%
	Average	47	62%
	Secure Retired	21	71%*
	Secure High Income	60	50%
Willingness To Take Risks	Low (0-4)	42	50%
	Medium (5-7)	83	71%
	High (8-10)	26	76%*
Technology Adopter	Innovator	12	53%*
	Early Adopter	29	62%*
	Early Majority	69	68%
	Late Majority	29	60%*
	Laggard	13	83%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		200	51%
Location	Metro	85	39%
	Regional	115	57%
Gas (Dual Fuel)	Yes	24	67%*
	No (Electricity only)	174	50%
Age Group	18 - 34	37	48%
	35 - 54	83	42%
	55+	80	58%
Home Ownership	Owners	146	47%
	Renters / Other	54	63%
Household Income (Annual)	Low (<\$50k)	85	62%
	Medium (\$50k -<\$100k)	58	56%
	High (>\$100k)	31	17%
Employment	Working FT / PT / Casual	104	43%
	Retired	62	62%
	Other	36	48%
Solar	Solar PVs	41	47%
	No Solar PVs	159	52%
	Solar hot water	13	71%*
	Neither	155	52%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	51%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	62%
	Medium (\$300 to \$499)	72	58%
	High (\$500+)	69	37%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	58%**
	Medium (\$200 to \$300)	5	100%**
	High (\$300+)	9	41%**
Customer Segments	Vulnerable Low Income	21	62%*
	Vulnerable Mid Income	8	57%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	69%
	Average	47	40%
	Secure Retired	21	48%*
	Secure High Income	60	41%
Willingness To Take Risks	Low (0-4)	42	28%
	Medium (5-7)	83	60%
	High (8-10)	26	72%*
Technology Adopter	Innovator	12	43%*
	Early Adopter	29	57%*
	Early Majority	69	47%
	Late Majority	29	49%*
	Laggard	13	83%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		200	22%	51%
Location	Metro	85	13%	62%
	Regional	115	27%	45%
Gas (Dual Fuel)	Yes	24	47%*	27%*
	No (Electricity only)	174	19%	53%
Age Group	18 - 34	37	42%	43%
	35 - 54	83	21%	53%
	55+	80	15%	52%
Home Ownership	Owners	146	18%	54%
	Renters / Other	54	35%	41%
Household Income (Annual)	Low (<\$50k)	85	20%	53%
	Medium (\$50k -<\$100k)	58	35%	45%
	High (>\$100k)	31	13%	61%
Employment	Working FT / PT / Casual	104	23%	59%
	Retired	62	20%	46%
	Other	36	21%	43%
Solar	Solar PVs	41	24%	48%
	No Solar PVs	159	22%	52%
	Solar hot water	13	44%*	15%*
	Neither	155	20%	52%
Switched Energy Company or Plan	In the past 12 months	0	-	-
	1 to 5 years ago	0	-	-
	NETT switched (Last 5 yrs)	0	-	-
	Have not switched at all	200	22%	51%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-
	No	0	-	-
Actively Investigated Options	Yes	0	-	-
	No	0	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	31%	43%
	Medium (\$300 to \$499)	72	29%	44%
	High (\$500+)	69	13%	65%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	60%**	30%**
	Medium (\$200 to \$300)	5	47%**	21%**
	High (\$300+)	9	34%**	34%**
Customer Segments	Vulnerable Low Income	21	14%*	50%*
	Vulnerable Mid Income	8	28%**	72%**
	Vulnerable High Income	2	40%**	0%**
	Low Income Retired	41	28%	44%
	Average	47	22%	52%
	Secure Retired	21	6%*	50%*
	Secure High Income	60	27%	56%
Willingness To Take Risks	Low (0-4)	42	9%	60%
	Medium (5-7)	83	18%	50%
	High (8-10)	26	16%*	51%*
Technology Adopter	Innovator	12	67%*	33%*
	Early Adopter	29	16%*	53%*
	Early Majority	69	7%	56%
	Late Majority	29	10%*	67%*
	Laggard	13	23%*	27%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		200	48%
Location	Metro	85	48%
	Regional	115	48%
Gas (Dual Fuel)	Yes	24	40%*
	No (Electricity only)	174	50%
Age Group	18 - 34	37	44%
	35 - 54	83	44%
	55+	80	53%
Home Ownership	Owners	146	48%
	Renters / Other	54	49%
Household Income (Annual)	Low (<\$50k)	85	45%
	Medium (\$50k -<\$100k)	58	66%
	High (>\$100k)	31	40%
Employment	Working FT / PT / Casual	104	44%
	Retired	62	57%
	Other	36	42%
Solar	Solar PVs	41	46%
	No Solar PVs	159	49%
	Solar hot water	13	46%*
	Neither	155	50%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	48%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	43%
	Medium (\$300 to \$499)	72	60%
	High (\$500+)	69	46%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	17%**
	Medium (\$200 to \$300)	5	67%**
	High (\$300+)	9	30%**
Customer Segments	Vulnerable Low Income	21	48%*
	Vulnerable Mid Income	8	32%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	62%
	Average	47	43%
	Secure Retired	21	47%*
	Secure High Income	60	44%
Willingness To Take Risks	Low (0-4)	42	46%
	Medium (5-7)	83	47%
	High (8-10)	26	58%*
Technology Adopter	Innovator	12	53%*
	Early Adopter	29	47%*
	Early Majority	69	55%
	Late Majority	29	39%*
	Laggard	13	41%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		200	31%
Location	Metro	85	28%
	Regional	115	33%
Gas (Dual Fuel)	Yes	24	47%*
	No (Electricity only)	174	30%
Age Group	18 - 34	37	37%
	35 - 54	83	26%
	55+	80	32%
Home Ownership	Owners	146	30%
	Renters / Other	54	34%
Household Income (Annual)	Low (<\$50k)	85	24%
	Medium (\$50k -<\$100k)	58	41%
	High (>\$100k)	31	35%
Employment	Working FT / PT / Casual	104	30%
	Retired	62	37%
	Other	36	24%
Solar	Solar PVs	41	29%
	No Solar PVs	159	32%
	Solar hot water	13	41%*
	Neither	155	32%
Switched Energy Company or Plan	In the past 12 months	0	-
	1 to 5 years ago	0	-
	NETT switched (Last 5 yrs)	0	-
	Have not switched at all	200	31%
Approached by Energy Company (Last 12 Months)	Yes	0	-
	No	0	-
Actively Investigated Options	Yes	0	-
	No	0	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	32%
	Medium (\$300 to \$499)	72	35%
	High (\$500+)	69	31%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	42%**
	Medium (\$200 to \$300)	5	80%**
	High (\$300+)	9	11%**
Customer Segments	Vulnerable Low Income	21	24%*
	Vulnerable Mid Income	8	17%**
	Vulnerable High Income	2	40%**
	Low Income Retired	41	34%
	Average	47	28%
	Secure Retired	21	43%*
	Secure High Income	60	30%
Willingness To Take Risks	Low (0-4)	42	19%
	Medium (5-7)	83	35%
	High (8-10)	26	42%*
Technology Adopter	Innovator	12	38%*
	Early Adopter	29	39%*
	Early Majority	69	29%
	Late Majority	29	27%*
	Laggard	13	36%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		200	58%	58%	40%	29%	46%	26%	22%
Location	Metro	85	61%	53%	43%	34%	48%	26%	19%
	Regional	115	56%	60%	39%	26%	45%	26%	24%
Gas (Dual Fuel)	Yes	24	53%*	52%*	31%*	39%*	55%*	21%*	15%*
	No (Electricity only)	174	58%	58%	41%	27%	45%	27%	23%
Age Group	18 - 34	37	65%	65%	46%	47%	42%	32%	33%
	35 - 54	83	62%	48%	39%	23%	46%	23%	24%
	55+	80	51%	62%	39%	25%	48%	26%	17%
Home Ownership	Owners	146	61%	60%	39%	28%	48%	27%	21%
	Renters / Other	54	46%	51%	46%	31%	40%	23%	27%
Household Income (Annual)	Low (<\$50k)	85	50%	62%	34%	23%	36%	22%	21%
	Medium (\$50k -<\$100k)	58	60%	59%	48%	35%	58%	26%	24%
	High (>\$100k)	31	71%	52%	49%	28%	46%	30%	20%
Employment	Working FT / PT / Casual	104	58%	49%	40%	30%	45%	26%	24%
	Retired	62	55%	69%	45%	29%	50%	30%	21%
	Other	36	62%	59%	37%	26%	41%	21%	21%
Solar	Solar PVs	41	44%	57%	36%	23%	50%	14%	9%
	No Solar PVs	159	61%	58%	41%	30%	45%	30%	26%
	Solar hot water	13	39%*	54%*	31%*	18%*	54%*	11%*	5%*
	Neither	155	61%	58%	41%	30%	45%	30%	25%
Switched Energy Company or Plan	In the past 12 months	0	-	-	-	-	-	-	-
	1 to 5 years ago	0	-	-	-	-	-	-	-
	NETT switched (Last 5 yrs)	0	-	-	-	-	-	-	-
	Have not switched at all	200	58%	58%	40%	29%	46%	26%	22%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Actively Investigated Options	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	50%	58%	28%	23%	54%	25%	25%
	Medium (\$300 to \$499)	72	60%	56%	39%	26%	46%	23%	18%
	High (\$500+)	69	62%	62%	48%	36%	40%	29%	24%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	57%**	22%**	21%**	14%**	43%**	0%**	14%**
	Medium (\$200 to \$300)	5	33%**	74%**	33%**	54%**	79%**	13%**	13%**
	High (\$300+)	9	67%**	67%**	45%**	60%**	49%**	45%**	11%**
Customer Segments	Vulnerable Low Income	21	56%*	64%*	28%*	23%*	36%*	12%*	15%*
	Vulnerable Mid Income	8	74%**	62%**	43%**	28%**	76%**	35%**	43%**
	Vulnerable High Income	2	100%***	100%***	100%***	100%***	100%***	100%***	100%***
	Low Income Retired	41	53%	71%	42%	27%	54%	32%	27%
	Average	47	50%	45%	31%	24%	40%	24%	21%
	Secure Retired	21	57%*	65%*	51%*	33%*	43%*	26%*	9%*
	Secure High Income	60	64%	48%	45%	32%	43%	26%	22%
Willingness To Take Risks	Low (0-4)	42	52%	65%	49%	19%	32%	26%	15%
	Medium (5-7)	83	50%	55%	31%	26%	48%	16%	15%
	High (8-10)	26	59%*	56%*	53%*	25%*	42%*	20%*	24%*
Technology Adopter	Innovator	12	49%*	54%*	64%*	45%*	56%*	45%*	37%*
	Early Adopter	29	59%*	50%*	36%*	26%*	37%*	7%*	7%*
	Early Majority	69	54%	66%	42%	20%	40%	19%	16%
	Late Majority	29	42%*	48%*	33%*	19%*	45%*	16%*	12%*
	Laggard	13	56%*	64%*	36%*	28%*	39%*	36%*	33%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan? (Cont'd)									
		(n=)	NETT Disagree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		200	6%	9%	14%	24%	18%	27%	38%
Location	Metro	85	6%	11%	13%	32%	19%	37%	39%
	Regional	115	6%	9%	14%	20%	18%	23%	37%
Gas (Dual Fuel)	Yes	24	4%*	17%*	22%*	33%*	20%*	40%*	41%*
	No (Electricity only)	174	5%	8%	13%	23%	18%	26%	37%
Age Group	18 - 34	37	5%	11%	19%	29%	19%	34%	31%
	35 - 54	83	4%	12%	12%	23%	18%	35%	35%
	55+	80	7%	7%	13%	23%	18%	20%	43%
Home Ownership	Owners	146	3%	8%	14%	24%	18%	26%	40%
	Renters / Other	54	12%	13%	12%	23%	18%	31%	33%
Household Income (Annual)	Low (<\$50k)	85	9%	3%	9%	21%	17%	20%	40%
	Medium (\$50k -<\$100k)	58	3%	14%	16%	24%	15%	35%	30%
	High (>\$100k)	31	3%	21%	29%	40%	39%	47%	56%
Employment	Working FT / PT / Casual	104	3%	15%	18%	22%	20%	30%	35%
	Retired	62	10%	4%	11%	24%	16%	20%	38%
	Other	36	4%	8%	8%	29%	15%	33%	43%
Solar	Solar PVs	41	11%	7%	19%	25%	17%	34%	44%
	No Solar PVs	159	4%	10%	13%	24%	18%	26%	36%
	Solar hot water	13	10%*	8%*	28%*	23%*	15%*	33%*	36%*
	Neither	155	4%	10%	13%	23%	17%	26%	36%
Switched Energy Company or Plan	In the past 12 months	0	-	-	-	-	-	-	-
	1 to 5 years ago	0	-	-	-	-	-	-	-
	NETT switched (Last 5 yrs)	0	-	-	-	-	-	-	-
	Have not switched at all	200	6%	9%	14%	24%	18%	27%	38%
Approached by Energy Company (Last 12 Months)	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Actively Investigated Options	Yes	0	-	-	-	-	-	-	-
	No	0	-	-	-	-	-	-	-
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	42	11%	6%	12%	20%	11%	24%	38%
	Medium (\$300 to \$499)	72	6%	12%	13%	27%	24%	35%	43%
	High (\$500+)	69	3%	6%	18%	27%	19%	24%	38%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	8	11%**	51%**	36%**	69%**	25%**	68%**	69%**
	Medium (\$200 to \$300)	5	0%**	0%**	21%**	0%**	21%**	41%**	40%**
	High (\$300+)	9	0%**	0%**	11%**	18%**	18%**	18%**	19%**
Customer Segments	Vulnerable Low Income	21	7%*	3%*	9%*	23%*	9%*	36%*	47%*
	Vulnerable Mid Income	8	0%**	7%**	15%**	17%**	0%**	22%**	15%**
	Vulnerable High Income	2	0%**	0%**	0%**	0%**	0%**	0%**	0%**
	Low Income Retired	41	11%	2%	7%	19%	12%	17%	36%
	Average	47	2%	6%	11%	19%	22%	25%	32%
	Secure Retired	21	6%*	8%*	18%*	35%*	24%*	28%*	42%*
	Secure High Income	60	4%	23%	23%	29%	25%	38%	43%
Willingness To Take Risks	Low (0-4)	42	2%	4%	3%	19%	15%	18%	35%
	Medium (5-7)	83	9%	5%	14%	27%	19%	29%	45%
	High (8-10)	26	0%*	9%*	0%*	21%*	8%*	27%*	23%*
Technology Adopter	Innovator	12	0%*	17%*	7%*	22%*	15%*	27%*	20%*
	Early Adopter	29	16%*	8%*	7%*	30%*	25%*	42%*	57%*
	Early Majority	69	3%	6%	10%	26%	16%	23%	39%
	Late Majority	29	5%*	0%*	7%*	21%*	15%*	26%*	36%*
	Laggard	13	0%*	0%*	6%*	0%*	6%*	0%*	14%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Appendix Nine: South Australia Tables

NB: Tables with total base size of n=<30 are not displayed.

Q13. Please tell me whether you think the following statements are True or False. a) Consumers in your state [territory] can choose their electricity company			
		(n=)	True
Total		400	96%
Location	Metro	309	95%
	Regional	91	98%
Gas (Dual Fuel)	Yes	216	97%
	No (Electricity only)	174	95%
Age Group	18 - 34	87	92%
	35 - 54	168	96%
	55+	145	97%
Home Ownership	Owners	283	97%
	Renters / Other	117	92%
Household Income (Annual)	Low (<\$50k)	163	95%
	Medium (\$50k -<\$100k)	118	96%
	High (>\$100k)	76	99%
Employment	Working FT / PT / Casual	200	97%
	Retired	101	97%
	Other	109	93%
Solar	Solar PVs	142	98%
	No Solar PVs	258	94%
	Solar hot water	44	92%
	Neither	232	96%
Switched Energy Company or Plan	In the past 12 months	91	99%
	1 to 5 years ago	110	100%
	NETT switched (Last 5 yrs)	201	99%
	Have not switched at all	199	92%
Approached by Energy Company (Last 12 Months)	Yes	146	98%
	No	211	94%
Actively Investigated Options	Yes	103	97%
	No	289	96%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	97%
	Medium (\$300 to \$499)	123	99%
	High (\$500+)	98	90%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	96%
	Medium (\$200 to \$300)	71	100%
	High (\$300+)	65	96%
Customer Segments	Vulnerable Low Income	68	94%
	Vulnerable Mid Income	23	100%*
	Vulnerable High Income	15	80%*
	Low Income Retired	61	95%
	Average	86	93%
	Secure Retired	37	100%
	Secure High Income	110	99%
Willingness To Take Risks	Low (0-4)	81	97%
	Medium (5-7)	152	96%
	High (8-10)	74	96%
Technology Adopter	Innovator	19	89%*
	Early Adopter	51	100%
	Early Majority	138	97%
	Late Majority	63	97%
	Laggard	38	88%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q13. Please tell me whether you think the following statements are True or False. b) Consumers in your state [territory] can choose their gas company.			
		(n=)	True
Total		216	92%
Location	Metro	207	95%
	Regional	9	36%**
Gas (Dual Fuel)	Yes	216	92%
	No (Electricity only)	0	-
Age Group	18 - 34	45	94%
	35 - 54	98	87%
	55+	73	96%
Home Ownership	Owners	157	94%
	Renters / Other	59	88%
Household Income (Annual)	Low (<\$50k)	73	90%
	Medium (\$50k -<\$100k)	77	92%
	High (>\$100k)	42	95%
Employment	Working FT / PT / Casual	112	91%
	Retired	49	94%
	Other	61	91%
Solar	Solar PVs	78	94%
	No Solar PVs	138	91%
	Solar hot water	10	93%*
	Neither	128	92%
Switched Energy Company or Plan	In the past 12 months	64	98%
	1 to 5 years ago	51	96%
	NETT switched (Last 5 yrs)	115	97%
	Have not switched at all	101	87%
Approached by Energy Company (Last 12 Months)	Yes	99	93%
	No	94	91%
Actively Investigated Options	Yes	69	89%
	No	142	94%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	91%
	Medium (\$300 to \$499)	72	94%
	High (\$500+)	45	90%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	92%
	Medium (\$200 to \$300)	71	94%
	High (\$300+)	65	91%
Customer Segments	Vulnerable Low Income	37	90%
	Vulnerable Mid Income	12	100%*
	Vulnerable High Income	13	79%*
	Low Income Retired	28	94%*
	Average	46	91%
	Secure Retired	19	94%*
	Secure High Income	61	94%
Willingness To Take Risks	Low (0-4)	38	97%
	Medium (5-7)	89	90%
	High (8-10)	41	94%
Technology Adopter	Innovator	14	93%*
	Early Adopter	33	94%
	Early Majority	72	94%
	Late Majority	31	89%
	Laggard	19	93%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		400	84%
Location	Metro	309	83%
	Regional	91	89%
Gas (Dual Fuel)	Yes	216	83%
	No (Electricity only)	174	87%
Age Group	18 - 34	87	86%
	35 - 54	168	85%
	55+	145	83%
Home Ownership	Owners	283	86%
	Renters / Other	117	81%
Household Income (Annual)	Low (<\$50k)	163	81%
	Medium (\$50k -<\$100k)	118	87%
	High (>\$100k)	76	94%
Employment	Working FT / PT / Casual	200	89%
	Retired	101	83%
	Other	109	79%
Solar	Solar PVs	142	85%
	No Solar PVs	258	84%
	Solar hot water	44	81%
	Neither	232	86%
Switched Energy Company or Plan	In the past 12 months	91	88%
	1 to 5 years ago	110	88%
	NETT switched (Last 5 yrs)	201	88%
	Have not switched at all	199	81%
Approached by Energy Company (Last 12 Months)	Yes	146	92%
	No	211	79%
Actively Investigated Options	Yes	103	94%
	No	289	81%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	83%
	Medium (\$300 to \$499)	123	86%
	High (\$500+)	98	85%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	86%
	Medium (\$200 to \$300)	71	81%
	High (\$300+)	65	81%
Customer Segments	Vulnerable Low Income	68	80%
	Vulnerable Mid Income	23	91%*
	Vulnerable High Income	15	67%*
	Low Income Retired	61	76%
	Average	86	82%
	Secure Retired	37	93%
	Secure High Income	110	92%
Willingness To Take Risks	Low (0-4)	81	83%
	Medium (5-7)	152	82%
	High (8-10)	74	84%
Technology Adopter	Innovator	19	77%*
	Early Adopter	51	90%
	Early Majority	138	86%
	Late Majority	63	75%
	Laggard	38	76%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

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.			
		(n=)	True
Total		216	74%
Location	Metro	207	74%
	Regional	9	65%**
Gas (Dual Fuel)	Yes	216	74%
	No (Electricity only)	0	-
Age Group	18 - 34	45	69%
	35 - 54	98	78%
	55+	73	72%
Home Ownership	Owners	157	74%
	Renters / Other	59	71%
Household Income (Annual)	Low (<\$50k)	73	71%
	Medium (\$50k -<\$100k)	77	76%
	High (>\$100k)	42	79%
Employment	Working FT / PT / Casual	112	78%
	Retired	49	73%
	Other	61	67%
Solar	Solar PVs	78	63%
	No Solar PVs	138	80%
	Solar hot water	10	72%*
	Neither	128	80%
Switched Energy Company or Plan	In the past 12 months	64	81%
	1 to 5 years ago	51	73%
	NETT switched (Last 5 yrs)	115	77%
	Have not switched at all	101	69%
Approached by Energy Company (Last 12 Months)	Yes	99	75%
	No	94	68%
Actively Investigated Options	Yes	69	81%
	No	142	71%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	71%
	Medium (\$300 to \$499)	72	75%
	High (\$500+)	45	77%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	73%
	Medium (\$200 to \$300)	71	76%
	High (\$300+)	65	70%
Customer Segments	Vulnerable Low Income	37	73%
	Vulnerable Mid Income	12	73%*
	Vulnerable High Income	13	37%*
	Low Income Retired	28	66%*
	Average	46	75%
	Secure Retired	19	80%*
	Secure High Income	61	83%
Willingness To Take Risks	Low (0-4)	38	81%
	Medium (5-7)	89	68%
	High (8-10)	41	74%
Technology Adopter	Innovator	14	70%*
	Early Adopter	33	81%
	Early Majority	72	75%
	Late Majority	31	57%
	Laggard	19	77%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?			
		(n=)	Yes
Total		400	26%
Location	Metro	309	26%
	Regional	91	24%
Gas (Dual Fuel)	Yes	216	33%
	No (Electricity only)	174	18%
Age Group	18 - 34	87	30%
	35 - 54	168	28%
	55+	145	22%
Home Ownership	Owners	283	30%
	Renters / Other	117	15%
Household Income (Annual)	Low (<\$50k)	163	22%
	Medium (\$50k -<\$100k)	118	34%
	High (>\$100k)	76	28%
Employment	Working FT / PT / Casual	200	31%
	Retired	101	24%
	Other	109	21%
Solar	Solar PVs	142	27%
	No Solar PVs	258	26%
	Solar hot water	44	23%
	Neither	232	26%
Switched Energy Company or Plan	In the past 12 months	91	51%
	1 to 5 years ago	110	26%
	NETT switched (Last 5 yrs)	201	37%
	Have not switched at all	199	14%
Approached by Energy Company (Last 12 Months)	Yes	146	38%
	No	211	19%
Actively Investigated Options	Yes	103	100%
	No	289	0%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	27%
	Medium (\$300 to \$499)	123	27%
	High (\$500+)	98	26%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	32%
	Medium (\$200 to \$300)	71	31%
	High (\$300+)	65	37%
Customer Segments	Vulnerable Low Income	68	21%
	Vulnerable Mid Income	23	26%*
	Vulnerable High Income	15	65%*
	Low Income Retired	61	21%
	Average	86	22%
	Secure Retired	37	28%
	Secure High Income	110	29%
Willingness To Take Risks	Low (0-4)	81	22%
	Medium (5-7)	152	28%
	High (8-10)	74	34%
Technology Adopter	Innovator	19	52%*
	Early Adopter	51	38%
	Early Majority	138	30%
	Late Majority	63	20%
	Laggard	38	6%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q51. The last time you switched your electricity company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		195	58%	18%
Location	Metro	146	58%	19%
	Regional	49	58%	18%
Gas (Dual Fuel)	Yes	109	60%	22%
	No (Electricity only)	84	57%	13%
Age Group	18 - 34	38	52%	21%
	35 - 54	84	59%	18%
	55+	73	61%	17%
Home Ownership	Owners	149	60%	19%
	Renters / Other	46	52%	17%
Household Income (Annual)	Low (<\$50k)	79	59%	15%
	Medium (\$50k -<\$100k)	59	64%	19%
	High (>\$100k)	36	49%	32%
Employment	Working FT / PT / Casual	102	55%	19%
	Retired	47	60%	21%
	Other	52	61%	19%
Solar	Solar PVs	74	60%	18%
	No Solar PVs	121	58%	19%
	Solar hot water	27	54%*	6%*
	Neither	106	59%	20%
Switched Energy Company or Plan	In the past 12 months	88	61%	18%
	1 to 5 years ago	107	57%	19%
	NETT switched (Last 5 yrs)	195	58%	18%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	83	52%	28%
	No	92	67%	10%
Actively Investigated Options	Yes	73	61%	25%
	No	118	57%	15%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	70	59%	16%
	Medium (\$300 to \$499)	68	52%	28%
	High (\$500+)	44	70%	12%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	25	60%*	22%*
	Medium (\$200 to \$300)	39	51%	24%
	High (\$300+)	39	66%	23%
Customer Segments	Vulnerable Low Income	31	72%	8%
	Vulnerable Mid Income	15	45%*	29%*
	Vulnerable High Income	8	90%**	0%**
	Low Income Retired	31	69%	6%
	Average	45	50%	24%
	Secure Retired	16	46%*	46%*
	Secure High Income	49	55%	16%
Willingness To Take Risks	Low (0-4)	39	57%	18%
	Medium (5-7)	74	50%	17%
	High (8-10)	39	76%	11%
Technology Adopter	Innovator	9	67%**	8%**
	Early Adopter	34	67%	14%
	Early Majority	66	54%	19%
	Late Majority	27	51%*	13%*
	Laggard	17	68%*	16%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q56. The last time you switched your gas company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?				
		(n=)	NETT Easy	NETT Difficult
Total		81	62%	17%
Location	Metro	81	62%	17%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	81	62%	17%
	No (Electricity only)	0	-	-
Age Group	18 - 34	21	62%*	14%*
	35 - 54	35	66%	15%
	55+	25	59%*	21%*
Home Ownership	Owners	62	63%	15%
	Renters / Other	19	57%*	22%*
Household Income (Annual)	Low (<\$50k)	23	59%*	18%*
	Medium (\$50k -<\$100k)	36	67%	15%
	High (>\$100k)	14	47%*	30%*
Employment	Working FT / PT / Casual	47	63%	16%
	Retired	14	63%*	16%*
	Other	22	62%*	19%*
Solar	Solar PVs	31	65%	22%
	No Solar PVs	50	60%	13%
	Solar hot water	6	67%**	0%**
	Neither	46	61%	15%
Switched Energy Company or Plan	In the past 12 months	54	60%	17%
	1 to 5 years ago	27	67%*	16%*
	NETT switched (Last 5 yrs)	81	62%	17%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	38	55%	26%
	No	34	70%	5%
Actively Investigated Options	Yes	36	63%	21%
	No	42	59%	14%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	26	67%*	12%*
	Medium (\$300 to \$499)	33	59%	24%
	High (\$500+)	16	56%*	17%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	19	64%*	20%*
	Medium (\$200 to \$300)	27	56%*	16%*
	High (\$300+)	29	57%*	19%*
Customer Segments	Vulnerable Low Income	14	64%*	23%*
	Vulnerable Mid Income	6	65%**	35%**
	Vulnerable High Income	6	82%**	0%**
	Low Income Retired	9	75%**	12%**
	Average	15	65%*	13%*
	Secure Retired	5	42%**	21%**
	Secure High Income	26	52%*	16%*
Willingness To Take Risks	Low (0-4)	11	71%*	0%*
	Medium (5-7)	35	50%	25%
	High (8-10)	18	83%*	6%*
Technology Adopter	Innovator	7	84%**	0%**
	Early Adopter	17	59%*	23%*
	Early Majority	27	66%*	17%*
	Late Majority	8	58%**	0%**
	Laggard	6	45%**	15%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q17a. In the past 5 years, how many times have you changed the following? Q17b. And was that in the last 12 months?					
		(n=)	% Changed in past 12 months	% Changed in past 5 years	% Not Switched in Last 5 Years
Total		400	23%	50%	50%
Location	Metro	309	25%	50%	50%
	Regional	91	16%	53%	47%
Gas (Dual Fuel)	Yes	216	30%	54%	46%
	No (Electricity only)	174	15%	48%	52%
Age Group	18 - 34	87	26%	45%	55%
	35 - 54	168	22%	50%	50%
	55+	145	21%	54%	46%
Home Ownership	Owners	283	26%	55%	45%
	Renters / Other	117	16%	41%	59%
Household Income (Annual)	Low (<\$50k)	163	20%	51%	49%
	Medium (\$50k -<\$100k)	118	26%	52%	48%
	High (>\$100k)	76	24%	48%	52%
Employment	Working FT / PT / Casual	200	26%	52%	48%
	Retired	101	23%	50%	50%
	Other	109	17%	50%	50%
Solar	Solar PVs	142	24%	54%	46%
	No Solar PVs	258	22%	48%	52%
	Solar hot water	44	28%	61%	39%
	Neither	232	21%	47%	53%
Switched Energy Company or Plan	In the past 12 months	91	100%	100%	0%
	1 to 5 years ago	110	0%	100%	0%
	NETT switched (Last 5 yrs)	201	45%	100%	0%
	Have not switched at all	199	0%	0%	100%
Approached by Energy Company (Last 12 Months)	Yes	146	31%	58%	42%
	No	211	18%	45%	55%
Actively Investigated Options	Yes	103	45%	73%	27%
	No	289	15%	42%	58%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	22%	51%	49%
	Medium (\$300 to \$499)	123	28%	56%	44%
	High (\$500+)	98	20%	48%	52%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	21%	47%	53%
	Medium (\$200 to \$300)	71	33%	57%	43%
	High (\$300+)	65	36%	61%	39%
Customer Segments	Vulnerable Low Income	68	14%	48%	52%
	Vulnerable Mid Income	23	31%*	66%*	34%*
	Vulnerable High Income	15	46%*	51%*	49%*
	Low Income Retired	61	25%	53%	47%
	Average	86	20%	54%	46%
	Secure Retired	37	20%	48%	52%
	Secure High Income	110	25%	45%	55%
Willingness To Take Risks	Low (0-4)	81	15%	50%	50%
	Medium (5-7)	152	27%	53%	47%
	High (8-10)	74	29%	52%	48%
Technology Adopter	Innovator	19	39%*	45%*	55%*
	Early Adopter	51	31%	71%	29%
	Early Majority	138	26%	52%	48%
	Late Majority	63	17%	43%	57%
	Laggard	38	15%	47%	53%

*Small sample size (n<30). **Extremely small sample size (n<10).

Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?			
		(n=)	Yes
Total		400	37%
Location	Metro	309	38%
	Regional	91	34%
Gas (Dual Fuel)	Yes	216	46%
	No (Electricity only)	174	28%
Age Group	18 - 34	87	34%
	35 - 54	168	36%
	55+	145	39%
Home Ownership	Owners	283	40%
	Renters / Other	117	30%
Household Income (Annual)	Low (<\$50k)	163	33%
	Medium (\$50k -<\$100k)	118	43%
	High (>\$100k)	76	46%
Employment	Working FT / PT / Casual	200	38%
	Retired	101	35%
	Other	109	40%
Solar	Solar PVs	142	41%
	No Solar PVs	258	35%
	Solar hot water	44	51%
	Neither	232	35%
Switched Energy Company or Plan	In the past 12 months	91	50%
	1 to 5 years ago	110	37%
	NETT switched (Last 5 yrs)	201	43%
	Have not switched at all	199	31%
Approached by Energy Company (Last 12 Months)	Yes	146	100%
	No	211	0%
Actively Investigated Options	Yes	103	54%
	No	289	32%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	37%
	Medium (\$300 to \$499)	123	48%
	High (\$500+)	98	27%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	46%
	Medium (\$200 to \$300)	71	47%
	High (\$300+)	65	50%
Customer Segments	Vulnerable Low Income	68	34%
	Vulnerable Mid Income	23	40%*
	Vulnerable High Income	15	62%*
	Low Income Retired	61	29%
	Average	86	43%
	Secure Retired	37	47%
	Secure High Income	110	31%
Willingness To Take Risks	Low (0-4)	81	23%
	Medium (5-7)	152	39%
	High (8-10)	74	37%
Technology Adopter	Innovator	19	64%*
	Early Adopter	51	36%
	Early Majority	138	35%
	Late Majority	63	25%
	Laggard	38	32%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal.

		(n=)	Importance Rating (NETT 8+)						
			The price per kilowatt hour (kWh)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Availability of green energy plans	The solar feed-in tariff on offer
Total		195	72%	65%	49%	46%	81%	32%	40%
Location	Metro	146	70%	65%	47%	49%	81%	34%	40%
	Regional	49	76%	66%	54%	38%	81%	26%	40%
Gas (Dual Fuel)	Yes	109	71%	68%	47%	49%	81%	36%	40%
	No (Electricity only)	84	72%	61%	50%	41%	81%	26%	39%
Age Group	18 - 34	38	60%	69%	61%	50%	69%	42%	42%
	35 - 54	84	75%	64%	47%	47%	81%	35%	38%
	55+	73	74%	65%	45%	44%	87%	25%	40%
Home Ownership	Owners	149	72%	64%	50%	46%	80%	32%	47%
	Renters / Other	46	69%	68%	45%	47%	85%	32%	16%
Household Income (Annual)	Low (<\$50k)	79	68%	67%	44%	45%	80%	30%	37%
	Medium (\$50k -<\$100k)	59	73%	68%	52%	48%	86%	28%	42%
	High (>\$100k)	36	83%	54%	51%	51%	74%	34%	50%
Employment	Working FT / PT / Casual	102	67%	62%	51%	45%	79%	32%	37%
	Retired	47	76%	68%	45%	46%	84%	27%	42%
	Other	52	74%	68%	50%	46%	81%	38%	43%
Solar	Solar PVs	74	82%	62%	50%	51%	82%	31%	79%
	No Solar PVs	121	65%	67%	48%	43%	80%	33%	15%
	Solar hot water	27	66%*	62%*	38%*	41%*	83%*	17%*	47%*
	Neither	106	67%	66%	51%	44%	79%	35%	15%
Switched Energy Company or Plan	In the past 12 months	88	72%	70%	54%	52%	87%	42%	33%
	1 to 5 years ago	107	71%	62%	45%	42%	76%	24%	45%
	NETT switched (Last 5 yrs)	195	72%	65%	49%	46%	81%	32%	40%
	Have not switched at all	0	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	83	78%	72%	52%	52%	81%	32%	41%
	No	92	67%	60%	50%	46%	81%	35%	40%
Actively Investigated Options	Yes	73	76%	70%	56%	54%	84%	27%	40%
	No	118	68%	61%	45%	42%	79%	35%	39%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	70	68%	61%	42%	41%	82%	32%	48%
	Medium (\$300 to \$499)	68	74%	74%	62%	52%	84%	33%	36%
	High (\$500+)	44	75%	63%	40%	51%	77%	31%	38%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	25	82%*	68%*	32%*	57%*	88%*	17%*	39%*
	Medium (\$200 to \$300)	39	63%	71%	49%	38%	74%	44%	35%
	High (\$300+)	39	76%	62%	54%	55%	80%	41%	54%
Customer Segments	Vulnerable Low Income	31	75%	70%	61%	62%	85%	41%	43%
	Vulnerable Mid Income	15	60%*	74%*	39%*	31%*	74%*	41%*	36%*
	Vulnerable High Income	8	75%**	60%**	90%**	81%**	75%**	50%**	56%**
	Low Income Retired	31	73%	68%	52%	42%	93%	36%	43%
	Average	45	71%	62%	39%	42%	78%	21%	44%
	Secure Retired	16	82%*	69%*	32%*	52%*	69%*	12%*	39%*
	Secure High Income	49	67%	60%	52%	41%	81%	39%	29%
Willingness To Take Risks	Low (0-4)	39	70%	62%	48%	39%	75%	17%	32%
	Medium (5-7)	74	72%	68%	54%	56%	85%	34%	42%
	High (8-10)	39	68%	64%	62%	53%	87%	37%	36%
Technology Adopter	Innovator	9	62%**	87%**	87%**	79%**	100%**	59%**	71%**
	Early Adopter	34	81%	75%	52%	52%	80%	34%	31%
	Early Majority	66	70%	56%	54%	52%	81%	34%	44%
	Late Majority	27	68%*	70%*	46%*	39%*	82%*	17%*	29%*
	Laggard	17	64%*	68%*	59%*	50%*	88%*	18%*	28%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q49. Below is a range of factors that people might consider when changing their energy company, plan or deal. For each one please rate how important it was in your decision to switch your electricity company, plan or deal. (Cont'd)

		(n=)	Importance Rating (NETT 8+)					
			Whether the price per kilowatt hour (kWh) can change during the contract	The ability to purchase or access energy storage batteries from the electricity company	The ability to purchase or access solar panels from the electricity company	The electricity company offering access to live data about your energy use and costs	The daily supply / service charge	The brand and reputation of the company
Total		195	60%	15%	18%	27%	59%	54%
Location	Metro	146	61%	17%	18%	28%	58%	54%
	Regional	49	56%	11%	21%	25%	63%	52%
Gas (Dual Fuel)	Yes	109	61%	21%	16%	32%	59%	56%
	No (Electricity only)	84	60%	8%	20%	18%	58%	49%
Age Group	18 - 34	38	55%	26%	21%	40%	50%	48%
	35 - 54	84	60%	13%	23%	25%	64%	54%
	55+	73	63%	12%	13%	23%	60%	56%
Home Ownership	Owners	149	60%	16%	22%	27%	60%	55%
	Renters / Other	46	62%	15%	6%	29%	58%	48%
Household Income (Annual)	Low (<\$50k)	79	59%	15%	15%	25%	57%	57%
	Medium (\$50k -<\$100k)	59	59%	17%	20%	33%	63%	46%
	High (>\$100k)	36	64%	17%	21%	28%	57%	49%
Employment	Working FT / PT / Casual	102	51%	15%	20%	29%	54%	47%
	Retired	47	71%	13%	17%	20%	63%	61%
	Other	52	65%	17%	20%	29%	59%	56%
Solar	Solar PVs	74	61%	19%	28%	27%	66%	56%
	No Solar PVs	121	59%	13%	13%	27%	55%	52%
	Solar hot water	27	47%*	15%*	19%*	16%*	67%*	51%*
	Neither	106	63%	14%	12%	29%	56%	52%
Switched Energy Company or Plan	In the past 12 months	88	66%	21%	15%	37%	63%	55%
	1 to 5 years ago	107	56%	11%	21%	19%	56%	53%
	NETT switched (Last 5 yrs)	195	60%	15%	18%	27%	59%	54%
	Have not switched at all	0	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	83	64%	20%	19%	36%	62%	51%
	No	92	59%	14%	17%	23%	60%	59%
Actively Investigated Options	Yes	73	63%	12%	21%	29%	64%	51%
	No	118	57%	17%	17%	26%	55%	55%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	70	56%	10%	18%	24%	61%	54%
	Medium (\$300 to \$499)	68	66%	26%	21%	34%	61%	56%
	High (\$500+)	44	61%	13%	17%	29%	56%	48%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	25	57%*	4%*	11%*	17%*	60%*	43%*
	Medium (\$200 to \$300)	39	58%	27%	16%	37%	57%	61%
	High (\$300+)	39	62%	26%	22%	38%	60%	56%
Customer Segments	Vulnerable Low Income	31	65%	18%	17%	38%	70%	65%
	Vulnerable Mid Income	15	60%*	15%*	20%*	34%*	60%*	53%*
	Vulnerable High Income	8	66%**	75%**	50%**	90%**	60%**	60%**
	Low Income Retired	31	74%	17%	12%	16%	75%	70%
	Average	45	54%	8%	15%	21%	50%	53%
	Secure Retired	16	65%*	6%*	26%*	26%*	42%*	46%*
	Secure High Income	49	49%	15%	20%	23%	57%	36%
Willingness To Take Risks	Low (0-4)	39	65%	10%	16%	12%	72%	65%
	Medium (5-7)	74	60%	16%	16%	31%	63%	48%
	High (8-10)	39	58%	24%	22%	41%	54%	66%
Technology Adopter	Innovator	9	79%**	59%**	46%**	59%**	62%**	67%**
	Early Adopter	34	60%	13%	25%	33%	64%	60%
	Early Majority	66	61%	16%	20%	30%	64%	53%
	Late Majority	27	55%*	7%*	5%*	22%*	54%*	61%*
	Laggard	17	64%*	20%*	4%*	10%*	76%*	56%*

*Small sample size (n<30). **Extremely small sample size (n<10).

Q54. Below is a range of factors that people might consider when changing their gas company, plan or deal. For each one please rate how important it was in your decision to switch your gas company or plan.

		(n=)	Importance Rating (NETT 8+)							
			The price per megajoule (MJ)	The estimated total bill amount	Contract duration	Whether you are locked into a contract	The discounts offered	Whether the price can change during the contract	The daily supply / service charge	The brand and reputation of the company
Total		81	75%	64%	44%	47%	85%	62%	66%	21%
Location	Metro	81	75%	64%	44%	47%	85%	62%	66%	21%
	Regional	0	-	-	-	-	-	-	-	-
Gas (Dual Fuel)	Yes	81	75%	64%	44%	47%	85%	62%	66%	21%
	No (Electricity only)	0	-	-	-	-	-	-	-	-
Age Group	18 - 34	21	76%*	62%*	48%*	53%*	91%*	57%*	62%*	0%*
	35 - 54	35	75%	67%	54%	51%	78%	61%	69%	0%
	55+	25	74%*	62%*	33%*	40%*	86%*	66%*	66%*	21%*
Home Ownership	Owners	62	77%	65%	45%	46%	83%	60%	69%	21%
	Renters / Other	19	68%*	60%*	41%*	53%*	91%*	70%*	56%*	0%*
Household Income (Annual)	Low (<\$50k)	23	69%*	67%*	43%*	50%*	92%*	68%*	52%*	100%*
	Medium (\$50k -<\$100k)	36	81%	63%	41%	46%	84%	65%	73%	0%
	High (>\$100k)	14	88%*	62%*	55%*	50%*	87%*	52%*	77%*	0%*
Employment	Working FT / PT / Casual	47	73%	59%	41%	51%	78%	55%	66%	0%
	Retired	14	73%*	74%*	51%*	49%*	88%*	74%*	67%*	43%*
	Other	22	78%*	63%*	40%*	40%*	95%*	62%*	63%*	0%*
Solar	Solar PVs	31	86%	67%	47%	54%	89%	66%	64%	100%
	No Solar PVs	50	68%	61%	41%	42%	82%	59%	68%	0%
	Solar hot water	6	89%**	89%**	11%**	56%**	89%**	78%**	89%**	0%**
	Neither	46	67%	59%	43%	44%	81%	58%	66%	0%
Switched Energy Company or Plan	In the past 12 months	54	73%	66%	41%	46%	84%	63%	70%	27%
	1 to 5 years ago	27	79%*	59%*	48%*	50%*	85%*	59%*	59%*	0%*
	NETT switched (Last 5 yrs)	81	75%	64%	44%	47%	85%	62%	66%	21%
	Have not switched at all	0	-	-	-	-	-	-	-	-
Approached by Energy Company (Last 12 Months)	Yes	38	84%	73%	39%	50%	86%	63%	73%	0%
	No	34	65%	52%	52%	42%	79%	54%	61%	50%
Actively Investigated Options	Yes	36	77%	66%	51%	57%	87%	68%	76%	0%
	No	42	72%	59%	38%	40%	81%	54%	55%	50%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	26	76%*	64%*	31%*	42%*	85%*	60%*	65%*	100%*
	Medium (\$300 to \$499)	33	77%	67%	57%	52%	84%	65%	71%	0%
	High (\$500+)	16	82%*	63%*	42%*	42%*	94%*	61%*	61%*	0%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	19	93%*	71%*	35%*	46%*	97%*	84%*	81%*	0%*
	Medium (\$200 to \$300)	27	65%*	61%*	51%*	53%*	73%*	57%*	58%*	100%*
	High (\$300+)	29	76%*	60%*	46%*	44%*	86%*	55%*	62%*	0%*
	Vulnerable Low Income	14	73%*	62%*	48%*	55%*	92%*	75%*	65%*	0%*
Customer Segments	Vulnerable Mid Income	6	82%**	82%**	29%**	29%**	83%**	65%**	65%**	0%**
	Vulnerable High Income	6	82%**	69%**	62%**	62%**	88%**	50%**	69%**	0%**
	Low Income Retired	9	91%**	81%**	56%**	66%**	91%**	81%**	81%**	100%**
	Average	15	80%*	60%*	32%*	42%*	87%*	74%*	67%*	0%*
	Secure Retired	5	42%**	63%**	42%**	21%**	84%**	63%**	42%**	0%**
	Secure High Income	26	72%*	52%*	43%*	46%*	75%*	39%*	66%*	0%*
Willingness To Take Risks	Low (0-4)	11	71%*	62%*	37%*	43%*	91%*	75%*	71%*	0%*
	Medium (5-7)	35	80%	72%	41%	49%	82%	70%	75%	0%
	High (8-10)	18	60%*	61%*	57%*	57%*	83%*	61%*	65%*	100%*
Technology Adopter	Innovator	7	84%**	100%**	68%**	84%**	90%**	58%**	74%**	0%**
	Early Adopter	17	82%*	58%*	43%*	39%*	82%*	78%*	74%*	0%*
	Early Majority	27	72%*	58%*	44%*	52%*	82%*	68%*	71%*	30%*
	Late Majority	8	58%**	67%**	58%**	58%**	73%**	73%**	73%**	0%**
	Laggard	6	65%**	100%**	20%**	35%**	100%**	55%**	65%**	0%**

*Small sample size (n<30). **Extremely small sample size (n<10).

Q34. When it comes to your household's energy company, which of the following statements is most applicable to your household?					
		(n=)	Not interested in switching company/plan	Recently switched so not looking for a while	NETT Interested / currently looking
Total		400	42%	8%	43%
Location	Metro	309	40%	9%	44%
	Regional	91	47%	4%	42%
Gas (Dual Fuel)	Yes	216	41%	9%	43%
	No (Electricity only)	174	42%	6%	45%
Age Group	18 - 34	87	25%	5%	57%
	35 - 54	168	48%	7%	37%
	55+	145	45%	9%	41%
Home Ownership	Owners	283	40%	9%	46%
	Renters / Other	117	46%	4%	38%
Household Income (Annual)	Low (<\$50k)	163	49%	5%	37%
	Medium (\$50k -<\$100k)	118	27%	11%	57%
	High (>\$100k)	76	36%	8%	50%
Employment	Working FT / PT / Casual	200	35%	8%	50%
	Retired	101	48%	8%	39%
	Other	109	47%	5%	37%
Solar	Solar PVs	142	43%	8%	45%
	No Solar PVs	258	41%	8%	43%
	Solar hot water	44	33%	13%	48%
	Neither	232	43%	7%	42%
Switched Energy Company or Plan	In the past 12 months	91	26%	24%	47%
	1 to 5 years ago	110	35%	7%	55%
	NETT switched (Last 5 yrs)	201	31%	14%	51%
	Have not switched at all	199	52%	1%	35%
Approached by Energy Company (Last 12 Months)	Yes	146	45%	10%	42%
	No	211	40%	7%	43%
Actively Investigated Options	Yes	103	22%	14%	61%
	No	289	49%	5%	37%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	44%	9%	39%
	Medium (\$300 to \$499)	123	41%	8%	46%
	High (\$500+)	98	33%	7%	52%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	42%	12%	39%
	Medium (\$200 to \$300)	71	49%	7%	41%
	High (\$300+)	65	32%	7%	53%
Customer Segments	Vulnerable Low Income	68	48%	3%	39%
	Vulnerable Mid Income	23	42%*	14%*	44%*
	Vulnerable High Income	15	13%*	0%*	75%*
	Low Income Retired	61	52%	12%	33%
	Average	86	42%	8%	40%
	Secure Retired	37	41%	3%	48%
	Secure High Income	110	34%	9%	50%
Willingness To Take Risks	Low (0-4)	81	47%	9%	35%
	Medium (5-7)	152	37%	9%	48%
	High (8-10)	74	36%	4%	46%
Technology Adopter	Innovator	19	18%*	0%*	64%*
	Early Adopter	51	23%	9%	60%
	Early Majority	138	37%	9%	46%
	Late Majority	63	40%	10%	41%
	Laggard	38	71%	4%	10%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q2. How satisfied are you with your current electricity company?			
		(n=)	Satisfied
Total		400	75%
Location	Metro	309	74%
	Regional	91	76%
Gas (Dual Fuel)	Yes	216	75%
	No (Electricity only)	174	75%
Age Group	18 - 34	87	79%
	35 - 54	168	73%
	55+	145	74%
Home Ownership	Owners	283	76%
	Renters / Other	117	73%
Household Income (Annual)	Low (<\$50k)	163	73%
	Medium (\$50k -<\$100k)	118	79%
	High (>\$100k)	76	75%
Employment	Working FT / PT / Casual	200	76%
	Retired	101	72%
	Other	109	75%
Solar	Solar PVs	142	74%
	No Solar PVs	258	75%
	Solar hot water	44	78%
	Neither	232	76%
Switched Energy Company or Plan	In the past 12 months	91	76%
	1 to 5 years ago	110	76%
	NETT switched (Last 5 yrs)	201	76%
	Have not switched at all	199	74%
Approached by Energy Company (Last 12 Months)	Yes	146	73%
	No	211	76%
Actively Investigated Options	Yes	103	74%
	No	289	76%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	78%
	Medium (\$300 to \$499)	123	76%
	High (\$500+)	98	71%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	75%
	Medium (\$200 to \$300)	71	84%
	High (\$300+)	65	69%
Customer Segments	Vulnerable Low Income	68	75%
	Vulnerable Mid Income	23	77%*
	Vulnerable High Income	15	90%*
	Low Income Retired	61	78%
	Average	86	76%
	Secure Retired	37	61%
	Secure High Income	110	76%
Willingness To Take Risks	Low (0-4)	81	75%
	Medium (5-7)	152	70%
	High (8-10)	74	86%
Technology Adopter	Innovator	19	80%*
	Early Adopter	51	85%
	Early Majority	138	75%
	Late Majority	63	63%
	Laggard	38	79%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q7. How satisfied are you with your current gas company?			
		(n=)	Satisfied
Total		216	73%
Location	Metro	207	73%
	Regional	9	54%**
Gas (Dual Fuel)	Yes	216	73%
	No (Electricity only)	0	-
Age Group	18 - 34	45	71%
	35 - 54	98	76%
	55+	73	70%
Home Ownership	Owners	157	75%
	Renters / Other	59	66%
Household Income (Annual)	Low (<\$50k)	73	75%
	Medium (\$50k -<\$100k)	77	75%
	High (>\$100k)	42	67%
Employment	Working FT / PT / Casual	112	73%
	Retired	49	68%
	Other	61	71%
Solar	Solar PVs	78	69%
	No Solar PVs	138	75%
	Solar hot water	10	72%*
	Neither	128	75%
Switched Energy Company or Plan	In the past 12 months	64	73%
	1 to 5 years ago	51	71%
	NETT switched (Last 5 yrs)	115	72%
	Have not switched at all	101	73%
Approached by Energy Company (Last 12 Months)	Yes	99	70%
	No	94	75%
Actively Investigated Options	Yes	69	70%
	No	142	74%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	75%
	Medium (\$300 to \$499)	72	75%
	High (\$500+)	45	63%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	71%
	Medium (\$200 to \$300)	71	79%
	High (\$300+)	65	70%
Customer Segments	Vulnerable Low Income	37	79%
	Vulnerable Mid Income	12	82%*
	Vulnerable High Income	13	88%*
	Low Income Retired	28	77%*
	Average	46	71%
	Secure Retired	19	54%*
	Secure High Income	61	70%
Willingness To Take Risks	Low (0-4)	38	83%
	Medium (5-7)	89	68%
	High (8-10)	41	85%
Technology Adopter	Innovator	14	85%*
	Early Adopter	33	75%
	Early Majority	72	74%
	Late Majority	31	63%
	Laggard	19	94%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q3. How would you rate the overall quality of customer service provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		400	73%
Location	Metro	309	73%
	Regional	91	73%
Gas (Dual Fuel)	Yes	216	74%
	No (Electricity only)	174	74%
Age Group	18 - 34	87	70%
	35 - 54	168	70%
	55+	145	77%
Home Ownership	Owners	283	73%
	Renters / Other	117	73%
Household Income (Annual)	Low (<\$50k)	163	75%
	Medium (\$50k -<\$100k)	118	75%
	High (>\$100k)	76	66%
Employment	Working FT / PT / Casual	200	73%
	Retired	101	76%
	Other	109	71%
Solar	Solar PVs	142	75%
	No Solar PVs	258	72%
	Solar hot water	44	65%
	Neither	232	74%
Switched Energy Company or Plan	In the past 12 months	91	79%
	1 to 5 years ago	110	76%
	NETT switched (Last 5 yrs)	201	77%
	Have not switched at all	199	69%
Approached by Energy Company (Last 12 Months)	Yes	146	79%
	No	211	71%
Actively Investigated Options	Yes	103	79%
	No	289	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	79%
	Medium (\$300 to \$499)	123	75%
	High (\$500+)	98	67%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	82%
	Medium (\$200 to \$300)	71	77%
	High (\$300+)	65	66%
Customer Segments	Vulnerable Low Income	68	75%
	Vulnerable Mid Income	23	60%*
	Vulnerable High Income	15	77%*
	Low Income Retired	61	82%
	Average	86	66%
	Secure Retired	37	68%
	Secure High Income	110	77%
Willingness To Take Risks	Low (0-4)	81	73%
	Medium (5-7)	152	70%
	High (8-10)	74	83%
Technology Adopter	Innovator	19	72%*
	Early Adopter	51	75%
	Early Majority	138	77%
	Late Majority	63	69%
	Laggard	38	72%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q8. How would you rate the overall quality of customer service provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		216	72%
Location	Metro	207	73%
	Regional	9	54%**
Gas (Dual Fuel)	Yes	216	72%
	No (Electricity only)	0	-
Age Group	18 - 34	45	73%
	35 - 54	98	73%
	55+	73	71%
Home Ownership	Owners	157	73%
	Renters / Other	59	69%
Household Income (Annual)	Low (<\$50k)	73	75%
	Medium (\$50k -<\$100k)	77	70%
	High (>\$100k)	42	69%
Employment	Working FT / PT / Casual	112	75%
	Retired	49	69%
	Other	61	68%
Solar	Solar PVs	78	70%
	No Solar PVs	138	74%
	Solar hot water	10	59%*
	Neither	128	75%
Switched Energy Company or Plan	In the past 12 months	64	72%
	1 to 5 years ago	51	74%
	NETT switched (Last 5 yrs)	115	73%
	Have not switched at all	101	71%
Approached by Energy Company (Last 12 Months)	Yes	99	73%
	No	94	72%
Actively Investigated Options	Yes	69	73%
	No	142	72%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	78%
	Medium (\$300 to \$499)	72	68%
	High (\$500+)	45	69%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	81%
	Medium (\$200 to \$300)	71	73%
	High (\$300+)	65	66%
Customer Segments	Vulnerable Low Income	37	77%
	Vulnerable Mid Income	12	64%*
	Vulnerable High Income	13	73%*
	Low Income Retired	28	71%*
	Average	46	68%
	Secure Retired	19	66%*
	Secure High Income	61	78%
Willingness To Take Risks	Low (0-4)	38	79%
	Medium (5-7)	89	67%
	High (8-10)	41	86%
Technology Adopter	Innovator	14	83%*
	Early Adopter	33	77%
	Early Majority	72	67%
	Late Majority	31	76%
	Laggard	19	91%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q4. How would you rate the overall value for money of the products and services provided by your electricity company?			
		(n=)	NETT Rating (7+)
Total		400	61%
Location	Metro	309	61%
	Regional	91	62%
Gas (Dual Fuel)	Yes	216	64%
	No (Electricity only)	174	60%
Age Group	18 - 34	87	66%
	35 - 54	168	65%
	55+	145	56%
Home Ownership	Owners	283	62%
	Renters / Other	117	61%
Household Income (Annual)	Low (<\$50k)	163	58%
	Medium (\$50k -<\$100k)	118	68%
	High (>\$100k)	76	56%
Employment	Working FT / PT / Casual	200	64%
	Retired	101	56%
	Other	109	62%
Solar	Solar PVs	142	60%
	No Solar PVs	258	62%
	Solar hot water	44	54%
	Neither	232	64%
Switched Energy Company or Plan	In the past 12 months	91	69%
	1 to 5 years ago	110	55%
	NETT switched (Last 5 yrs)	201	61%
	Have not switched at all	199	62%
Approached by Energy Company (Last 12 Months)	Yes	146	57%
	No	211	67%
Actively Investigated Options	Yes	103	59%
	No	289	63%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	66%
	Medium (\$300 to \$499)	123	61%
	High (\$500+)	98	55%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	63%
	Medium (\$200 to \$300)	71	68%
	High (\$300+)	65	60%
Customer Segments	Vulnerable Low Income	68	59%
	Vulnerable Mid Income	23	50%*
	Vulnerable High Income	15	85%*
	Low Income Retired	61	65%
	Average	86	59%
	Secure Retired	37	40%
	Secure High Income	110	71%
Willingness To Take Risks	Low (0-4)	81	57%
	Medium (5-7)	152	56%
	High (8-10)	74	75%
Technology Adopter	Innovator	19	69%*
	Early Adopter	51	64%
	Early Majority	138	62%
	Late Majority	63	49%
	Laggard	38	68%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q9. How would you rate the overall value for money of the products and services provided by your gas company?			
		(n=)	NETT Rating (7+)
Total		216	65%
Location	Metro	207	65%
	Regional	9	46%**
Gas (Dual Fuel)	Yes	216	65%
	No (Electricity only)	0	-
Age Group	18 - 34	45	62%
	35 - 54	98	71%
	55+	73	61%
Home Ownership	Owners	157	66%
	Renters / Other	59	61%
Household Income (Annual)	Low (<\$50k)	73	65%
	Medium (\$50k -<\$100k)	77	60%
	High (>\$100k)	42	73%
Employment	Working FT / PT / Casual	112	71%
	Retired	49	55%
	Other	61	59%
Solar	Solar PVs	78	61%
	No Solar PVs	138	67%
	Solar hot water	10	52%*
	Neither	128	68%
Switched Energy Company or Plan	In the past 12 months	64	66%
	1 to 5 years ago	51	56%
	NETT switched (Last 5 yrs)	115	61%
	Have not switched at all	101	68%
Approached by Energy Company (Last 12 Months)	Yes	99	60%
	No	94	68%
Actively Investigated Options	Yes	69	58%
	No	142	68%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	80	69%
	Medium (\$300 to \$499)	72	60%
	High (\$500+)	45	59%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	69%
	Medium (\$200 to \$300)	71	62%
	High (\$300+)	65	63%
Customer Segments	Vulnerable Low Income	37	68%
	Vulnerable Mid Income	12	64%*
	Vulnerable High Income	13	73%*
	Low Income Retired	28	62%*
	Average	46	64%
	Secure Retired	19	44%*
	Secure High Income	61	73%
Willingness To Take Risks	Low (0-4)	38	66%
	Medium (5-7)	89	61%
	High (8-10)	41	71%
Technology Adopter	Innovator	14	83%*
	Early Adopter	33	60%
	Early Majority	72	60%
	Late Majority	31	60%
	Laggard	19	81%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [territory]?				
		(n=)	NETT Satisfied	NETT Dissatisfied
Total		400	65%	10%
Location	Metro	309	66%	10%
	Regional	91	62%	9%
Gas (Dual Fuel)	Yes	216	66%	11%
	No (Electricity only)	174	65%	9%
Age Group	18 - 34	87	63%	9%
	35 - 54	168	64%	10%
	55+	145	67%	11%
Home Ownership	Owners	283	66%	9%
	Renters / Other	117	64%	12%
Household Income (Annual)	Low (<\$50k)	163	66%	12%
	Medium (\$50k -<\$100k)	118	68%	5%
	High (>\$100k)	76	60%	12%
Employment	Working FT / PT / Casual	200	67%	8%
	Retired	101	67%	11%
	Other	109	62%	12%
Solar	Solar PVs	142	63%	10%
	No Solar PVs	258	66%	10%
	Solar hot water	44	62%	10%
	Neither	232	68%	10%
Switched Energy Company or Plan	In the past 12 months	91	66%	14%
	1 to 5 years ago	110	63%	11%
	NETT switched (Last 5 yrs)	201	65%	13%
	Have not switched at all	199	66%	7%
Approached by Energy Company (Last 12 Months)	Yes	146	65%	12%
	No	211	66%	8%
Actively Investigated Options	Yes	103	63%	16%
	No	289	66%	8%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	71%	9%
	Medium (\$300 to \$499)	123	62%	9%
	High (\$500+)	98	59%	15%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	67%	6%
	Medium (\$200 to \$300)	71	67%	12%
	High (\$300+)	65	62%	13%
Customer Segments	Vulnerable Low Income	68	67%	12%
	Vulnerable Mid Income	23	55%*	14%*
	Vulnerable High Income	15	85%*	5%*
	Low Income Retired	61	66%	9%
	Average	86	60%	11%
	Secure Retired	37	66%	15%
	Secure High Income	110	67%	6%
Willingness To Take Risks	Low (0-4)	81	59%	13%
	Medium (5-7)	152	59%	13%
	High (8-10)	74	78%	6%
Technology Adopter	Innovator	19	71%*	9%*
	Early Adopter	51	67%	11%
	Early Majority	138	66%	11%
	Late Majority	63	57%	14%
	Laggard	38	55%	11%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		195	79%	6%
Location	Metro	146	79%	6%
	Regional	49	80%	6%
Gas (Dual Fuel)	Yes	109	82%	5%
	No (Electricity only)	84	76%	8%
Age Group	18 - 34	38	71%	10%
	35 - 54	84	78%	6%
	55+	73	84%	4%
Home Ownership	Owners	149	79%	7%
	Renters / Other	46	79%	2%
Household Income (Annual)	Low (<\$50k)	79	81%	8%
	Medium (\$50k -<\$100k)	59	84%	5%
	High (>\$100k)	36	68%	5%
Employment	Working FT / PT / Casual	102	74%	7%
	Retired	47	87%	4%
	Other	52	81%	9%
Solar	Solar PVs	74	80%	9%
	No Solar PVs	121	79%	5%
	Solar hot water	27	71%*	10%*
	Neither	106	80%	5%
Switched Energy Company or Plan	In the past 12 months	88	78%	7%
	1 to 5 years ago	107	80%	5%
	NETT switched (Last 5 yrs)	195	79%	6%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	83	80%	10%
	No	92	79%	4%
Actively Investigated Options	Yes	73	79%	8%
	No	118	79%	5%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	70	83%	6%
	Medium (\$300 to \$499)	68	78%	5%
	High (\$500+)	44	77%	7%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	25	97%*	0%*
	Medium (\$200 to \$300)	39	77%	5%
	High (\$300+)	39	79%	9%
Customer Segments	Vulnerable Low Income	31	82%	11%
	Vulnerable Mid Income	15	53%*	15%*
	Vulnerable High Income	8	75%**	10%**
	Low Income Retired	31	88%	6%
	Average	45	81%	3%
	Secure Retired	16	86%*	0%*
	Secure High Income	49	75%	6%
Willingness To Take Risks	Low (0-4)	39	83%	9%
	Medium (5-7)	74	69%	8%
	High (8-10)	39	93%	0%
Technology Adopter	Innovator	9	79%**	21%**
	Early Adopter	34	74%	6%
	Early Majority	66	74%	9%
	Late Majority	27	90%*	0%*
	Laggard	17	84%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q50. Having switched your electricity company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		195	77%	10%
Location	Metro	146	77%	10%
	Regional	49	78%	7%
Gas (Dual Fuel)	Yes	109	84%	9%
	No (Electricity only)	84	69%	10%
Age Group	18 - 34	38	68%	18%
	35 - 54	84	68%	10%
	55+	73	88%	5%
Home Ownership	Owners	149	79%	10%
	Renters / Other	46	71%	8%
Household Income (Annual)	Low (<\$50k)	79	80%	10%
	Medium (\$50k -<\$100k)	59	80%	11%
	High (>\$100k)	36	69%	10%
Employment	Working FT / PT / Casual	102	72%	13%
	Retired	47	90%	4%
	Other	52	75%	11%
Solar	Solar PVs	74	81%	10%
	No Solar PVs	121	75%	9%
	Solar hot water	27	64%*	13%*
	Neither	106	76%	10%
Switched Energy Company or Plan	In the past 12 months	88	76%	13%
	1 to 5 years ago	107	78%	7%
	NETT switched (Last 5 yrs)	195	77%	10%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	83	79%	9%
	No	92	75%	11%
Actively Investigated Options	Yes	73	82%	6%
	No	118	74%	12%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	70	80%	7%
	Medium (\$300 to \$499)	68	74%	13%
	High (\$500+)	44	78%	12%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	25	91%*	0%*
	Medium (\$200 to \$300)	39	76%	14%
	High (\$300+)	39	85%	10%
Customer Segments	Vulnerable Low Income	31	74%	11%
	Vulnerable Mid Income	15	55%*	22%*
	Vulnerable High Income	8	90%**	10%**
	Low Income Retired	31	85%	6%
	Average	45	76%	6%
	Secure Retired	16	97%*	0%*
	Secure High Income	49	71%	16%
Willingness To Take Risks	Low (0-4)	39	75%	9%
	Medium (5-7)	74	71%	10%
	High (8-10)	39	86%	7%
Technology Adopter	Innovator	9	67%**	21%**
	Early Adopter	34	73%	5%
	Early Majority	66	77%	13%
	Late Majority	27	72%*	6%*
	Laggard	17	88%*	0%*

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? The last time I switched I was happy with the decision				
		(n=)	NETT Agree	NETT Disagree
Total		81	84%	4%
Location	Metro	81	84%	4%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	81	84%	4%
	No (Electricity only)	0	-	-
Age Group	18 - 34	21	86%*	0%*
	35 - 54	35	82%	2%
	55+	25	84%*	8%*
Home Ownership	Owners	62	85%	5%
	Renters / Other	19	78%*	0%*
Household Income (Annual)	Low (<\$50k)	23	82%*	10%*
	Medium (\$50k -<\$100k)	36	86%	2%
	High (>\$100k)	14	70%*	0%*
Employment	Working FT / PT / Casual	47	82%	2%
	Retired	14	86%*	14%*
	Other	22	86%*	0%*
Solar	Solar PVs	31	79%	9%
	No Solar PVs	50	86%	0%
	Solar hot water	6	89%**	0%**
	Neither	46	87%	0%
Switched Energy Company or Plan	In the past 12 months	54	83%	4%
	1 to 5 years ago	27	85%*	4%*
	NETT switched (Last 5 yrs)	81	84%	4%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	38	84%	6%
	No	34	83%	3%
Actively Investigated Options	Yes	36	83%	6%
	No	42	83%	3%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	26	91%*	9%*
	Medium (\$300 to \$499)	33	78%	0%
	High (\$500+)	16	79%*	0%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	19	86%*	7%*
	Medium (\$200 to \$300)	27	81%*	4%*
	High (\$300+)	29	84%*	2%*
Customer Segments	Vulnerable Low Income	14	85%*	0%*
	Vulnerable Mid Income	6	82%**	0%**
	Vulnerable High Income	6	100%**	0%**
	Low Income Retired	9	78%**	22%**
	Average	15	94%*	0%*
	Secure Retired	5	100%**	0%**
	Secure High Income	26	70%*	3%*
Willingness To Take Risks	Low (0-4)	11	100%*	0%*
	Medium (5-7)	35	74%	4%
	High (8-10)	18	100%*	0%*
Technology Adopter	Innovator	7	84%**	0%**
	Early Adopter	17	78%*	0%*
	Early Majority	27	89%*	5%*
	Late Majority	8	82%**	0%**
	Laggard	6	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q55. Thinking about the last time you switched your gas company, plan or deal, to what extent do you agree or disagree with the following? I was satisfied with the process involved in switching				
		(n=)	NETT Agree	NETT Disagree
Total		81	84%	8%
Location	Metro	81	84%	8%
	Regional	0	-	-
Gas (Dual Fuel)	Yes	81	84%	8%
	No (Electricity only)	0	-	-
Age Group	18 - 34	21	91%*	5%*
	35 - 54	35	77%	10%
	55+	25	85%*	8%*
Home Ownership	Owners	62	85%	10%
	Renters / Other	19	78%*	0%*
Household Income (Annual)	Low (<\$50k)	23	78%*	14%*
	Medium (\$50k -<\$100k)	36	88%	5%
	High (>\$100k)	14	80%*	8%*
Employment	Working FT / PT / Casual	47	87%	6%
	Retired	14	80%*	14%*
	Other	22	81%*	5%*
Solar	Solar PVs	31	78%	15%
	No Solar PVs	50	88%	2%
	Solar hot water	6	89%**	0%**
	Neither	46	88%	2%
Switched Energy Company or Plan	In the past 12 months	54	83%	7%
	1 to 5 years ago	27	85%*	8%*
	NETT switched (Last 5 yrs)	81	84%	8%
	Have not switched at all	0	-	-
Approached by Energy Company (Last 12 Months)	Yes	38	85%	14%
	No	34	83%	3%
Actively Investigated Options	Yes	36	86%	8%
	No	42	81%	7%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	26	84%*	12%*
	Medium (\$300 to \$499)	33	85%	3%
	High (\$500+)	16	79%*	7%*
Gas Spend (Last Quarterly Bill)	Low (<\$200)	19	86%*	7%*
	Medium (\$200 to \$300)	27	76%*	12%*
	High (\$300+)	29	89%*	6%*
Customer Segments	Vulnerable Low Income	14	78%*	7%*
	Vulnerable Mid Income	6	65%**	17%**
	Vulnerable High Income	6	100%**	0%**
	Low Income Retired	9	78%**	22%**
	Average	15	94%*	0%*
	Secure Retired	5	84%**	0%**
	Secure High Income	26	84%*	8%*
Willingness To Take Risks	Low (0-4)	11	100%*	0%*
	Medium (5-7)	35	76%	10%
	High (8-10)	18	100%*	0%*
Technology Adopter	Innovator	7	84%**	16%**
	Early Adopter	17	84%*	0%*
	Early Majority	27	86%*	9%*
	Late Majority	8	91%**	0%**
	Laggard	6	100%**	0%**

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs?			
		(n=)	NETT Rating (7+)
Total		400	62%
Location	Metro	309	62%
	Regional	91	60%
Gas (Dual Fuel)	Yes	216	66%
	No (Electricity only)	174	58%
Age Group	18 - 34	87	69%
	35 - 54	168	67%
	55+	145	54%
Home Ownership	Owners	283	63%
	Renters / Other	117	59%
Household Income (Annual)	Low (<\$50k)	163	58%
	Medium (\$50k -<\$100k)	118	73%
	High (>\$100k)	76	56%
Employment	Working FT / PT / Casual	200	66%
	Retired	101	51%
	Other	109	68%
Solar	Solar PVs	142	60%
	No Solar PVs	258	63%
	Solar hot water	44	54%
	Neither	232	64%
Switched Energy Company or Plan	In the past 12 months	91	75%
	1 to 5 years ago	110	63%
	NETT switched (Last 5 yrs)	201	68%
	Have not switched at all	199	55%
Approached by Energy Company (Last 12 Months)	Yes	146	67%
	No	211	60%
Actively Investigated Options	Yes	103	79%
	No	289	57%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	66%
	Medium (\$300 to \$499)	123	59%
	High (\$500+)	98	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	71%
	Medium (\$200 to \$300)	71	65%
	High (\$300+)	65	60%
Customer Segments	Vulnerable Low Income	68	66%
	Vulnerable Mid Income	23	50%*
	Vulnerable High Income	15	82%*
	Low Income Retired	61	53%
	Average	86	66%
	Secure Retired	37	49%
	Secure High Income	110	67%
Willingness To Take Risks	Low (0-4)	81	52%
	Medium (5-7)	152	61%
	High (8-10)	74	79%
Technology Adopter	Innovator	19	70%*
	Early Adopter	51	76%
	Early Majority	138	68%
	Late Majority	63	43%
	Laggard	38	56%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q46. When it comes to the energy options and offers available in your state [territory], how confident are you that you can choose one that is right for your household?

		(n=)	NETT Rating (7+)
Total		400	63%
Location	Metro	309	63%
	Regional	91	66%
Gas (Dual Fuel)	Yes	216	63%
	No (Electricity only)	174	65%
Age Group	18 - 34	87	67%
	35 - 54	168	65%
	55+	145	61%
Home Ownership	Owners	283	63%
	Renters / Other	117	66%
Household Income (Annual)	Low (<\$50k)	163	62%
	Medium (\$50k -<\$100k)	118	73%
	High (>\$100k)	76	53%
Employment	Working FT / PT / Casual	200	63%
	Retired	101	60%
	Other	109	67%
Solar	Solar PVs	142	64%
	No Solar PVs	258	63%
	Solar hot water	44	58%
	Neither	232	65%
Switched Energy Company or Plan	In the past 12 months	91	66%
	1 to 5 years ago	110	61%
	NETT switched (Last 5 yrs)	201	63%
	Have not switched at all	199	64%
Approached by Energy Company (Last 12 Months)	Yes	146	60%
	No	211	67%
Actively Investigated Options	Yes	103	65%
	No	289	64%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	68%
	Medium (\$300 to \$499)	123	61%
	High (\$500+)	98	62%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	67%
	Medium (\$200 to \$300)	71	64%
	High (\$300+)	65	57%
Customer Segments	Vulnerable Low Income	68	74%
	Vulnerable Mid Income	23	55%*
	Vulnerable High Income	15	78%*
	Low Income Retired	61	59%
	Average	86	55%
	Secure Retired	37	59%
	Secure High Income	110	69%
Willingness To Take Risks	Low (0-4)	81	60%
	Medium (5-7)	152	57%
	High (8-10)	74	76%
Technology Adopter	Innovator	19	76%*
	Early Adopter	51	67%
	Early Majority	138	65%
	Late Majority	63	48%
	Laggard	38	66%

*Small sample size (n=<30). **Extremely small sample size (n=<10).

Q59. Do you agree or disagree with the following things some people have said about switching their energy company or plan?									
		(n=)	NEIT Agree						
			I would switch my energy company if I was not satisfied with my current company	I'm concerned that if I switch energy company or plan there might be hidden fees and charges	I generally don't trust energy companies that promise a better deal	It is too complicated to try and compare the various options and offers available	I would prefer to try and save energy to reduce my bill than to seek out a better deal	The amount of money I could save is not worth the time and effort involved in switching	I don't have the time or energy to think about switching
Total		400	79%	66%	57%	57%	49%	46%	43%
Location	Metro	309	79%	64%	54%	58%	48%	45%	43%
	Regional	91	79%	74%	66%	56%	54%	50%	42%
Gas (Dual Fuel)	Yes	216	80%	65%	55%	57%	46%	45%	46%
	No (Electricity only)	174	77%	69%	61%	58%	52%	50%	39%
Age Group	18 - 34	87	73%	70%	52%	60%	52%	48%	59%
	35 - 54	168	75%	65%	49%	46%	48%	37%	40%
	55+	145	85%	65%	65%	64%	48%	52%	37%
Home Ownership	Owners	283	80%	68%	58%	60%	50%	48%	45%
	Renters / Other	117	78%	62%	55%	51%	47%	43%	39%
Household Income (Annual)	Low (<\$50k)	163	77%	67%	62%	58%	50%	52%	35%
	Medium (\$50k -<\$100k)	118	87%	74%	50%	53%	49%	39%	46%
	High (>\$100k)	76	74%	59%	57%	62%	50%	43%	58%
Employment	Working FT / PT / Casual	200	77%	68%	51%	56%	50%	45%	51%
	Retired	101	83%	64%	66%	67%	49%	57%	37%
	Other	109	79%	64%	57%	50%	50%	40%	38%
Solar	Solar PVs	142	82%	69%	68%	61%	52%	54%	37%
	No Solar PVs	258	77%	65%	50%	55%	47%	42%	46%
	Solar hot water	44	82%	66%	55%	59%	47%	32%	37%
	Neither	232	78%	65%	51%	55%	48%	44%	46%
Switched Energy Company or Plan	In the past 12 months	91	84%	65%	50%	60%	38%	36%	47%
	1 to 5 years ago	110	86%	66%	59%	48%	45%	36%	30%
	NETT switched (Last 5 yrs)	201	85%	66%	55%	54%	42%	36%	38%
	Have not switched at all	199	73%	67%	59%	61%	56%	57%	48%
Approached by Energy Company (Last 12 Months)	Yes	146	83%	68%	65%	68%	59%	51%	50%
	No	211	78%	68%	53%	53%	42%	44%	41%
Actively Investigated Options	Yes	103	86%	65%	57%	52%	45%	36%	39%
	No	289	77%	68%	58%	60%	52%	51%	45%
Electricity Spend (Last Quarterly Bill)	Low (<\$300)	143	80%	61%	53%	55%	46%	45%	35%
	Medium (\$300 to \$499)	123	78%	74%	64%	63%	56%	50%	50%
	High (\$500+)	98	80%	70%	58%	58%	45%	43%	45%
Gas Spend (Last Quarterly Bill)	Low (<\$200)	62	79%	63%	49%	55%	44%	48%	37%
	Medium (\$200 to \$300)	71	79%	59%	53%	60%	51%	41%	51%
	High (\$300+)	65	85%	79%	67%	64%	45%	45%	51%
Customer Segments	Vulnerable Low Income	68	82%	67%	61%	52%	54%	41%	28%
	Vulnerable Mid Income	23	85%*	73%*	77%*	55%*	33%*	50%*	43%*
	Vulnerable High Income	15	78%*	82%*	72%*	72%*	65%*	54%*	64%*
	Low Income Retired	61	81%	64%	60%	65%	42%	47%	28%
	Average	86	74%	68%	51%	51%	51%	39%	49%
	Secure Retired	37	85%	64%	74%	71%	57%	73%	51%
Willingness To Take Risks	Secure High Income	110	76%	63%	43%	53%	46%	42%	52%
	Low (0-4)	81	74%	66%	61%	60%	46%	45%	39%
	Medium (5-7)	152	72%	67%	51%	54%	42%	38%	37%
	High (8-10)	74	85%	57%	47%	45%	40%	46%	44%
Technology Adopter	Innovator	19	82%*	69%*	62%*	83%*	51%*	56%*	60%*
	Early Adopter	51	82%	60%	38%	46%	38%	33%	32%
	Early Majority	138	80%	66%	54%	48%	42%	40%	37%
	Late Majority	63	68%	66%	65%	60%	39%	48%	40%
	Laggard	38	61%	62%	44%	57%	52%	44%	45%

*Small sample size (n=<30). **Extremely small sample size (n=<10).