



CONSUMER RESEARCH FOR THE AUSTRALIAN ENERGY MARKET COMMISSION'S 2017 RETAIL COMPETITION REVIEW

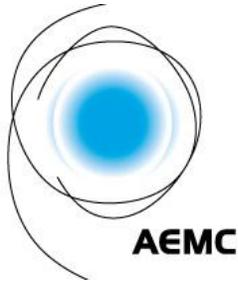
FINAL REPORT | APRIL 2017



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REPORT PREPARED FOR

Australian Energy Market Commission



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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.

Where we have made assumptions as a part of interpreting the data in this report, we have sought to make those assumptions clear. Similarly, we have sought to make clear where we are expressing our professional opinion rather than reporting findings. Please ensure that you take these assumptions into account when using this report as the basis for any decision-making.

For the quantitative research results, the base (number and type of respondents asked each question) and the actual survey questions are shown at the bottom of each page. Results may not always total 100% due to rounding.

Weighted results are shown throughout the report, unless otherwise specified. Full details of the methodology will be detailed in the final report.

This project was conducted in accordance with AS: ISO20252:2012 guidelines, the international quality standard for market and social research, to which Newgate Research is accredited. Project reference number: NGR 1611004.

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CONTENTS

	<i>Page</i>
Executive Summary	5
Introduction	10
Background and Objectives	11
Research Methodology	12
Notes to Reader	15
Research Findings: National Energy Market	16
Consumer Activity	17
<i>Consumer knowledge</i>	19
<i>Investigating options</i>	23
<i>Information sources</i>	26
<i>Switching behaviour</i>	29
<i>Motivation and rationale</i>	37
Consumer Outcomes	48
<i>Consumer choice</i>	50
<i>Perceptions and satisfaction</i>	56
<i>New energy technologies</i>	64
<i>Embedded networks</i>	69

CONTENTS

	<i>Page</i>
Research Findings by Jurisdiction	72
Queensland	73
<i>South East Queensland</i>	<i>74</i>
<i>Rest of Queensland</i>	<i>91</i>
New South Wales	101
Australian Capital Territory	118
Victoria	135
Tasmania	152
South Australia	162
Appendices	179
Appendix 1: Quantitative Questionnaires	180
Appendix 2: Participant Profile	181

EXECUTIVE SUMMARY



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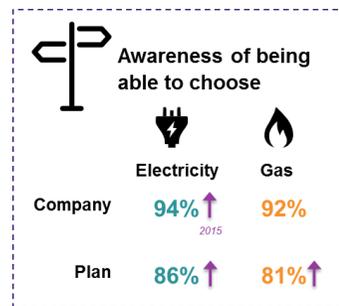
EXECUTIVE SUMMARY

This executive summary outlines the key findings from a quantitative study conducted on behalf of the Australian Energy Market Commission (AEMC) in January and February 2017, designed to inform the AEMC’s fourth annual retail competition review.

The research was based on a mixed-method telephone and online survey conducted with a sample of n=2,147 residential energy consumers and n=550 small businesses across the National Electricity Market (NEM) – i.e. Queensland, New South Wales (NSW), the Australian Capital Territory (ACT), Victoria, Tasmania and South Australia. However, the term “NEM” has been used throughout this report with the exclusion of Tasmania and the rest of Queensland beyond South East Queensland, where there is limited or no choice of energy providers or plans.

CONSUMER ACTIVITY

Consumer knowledge of the energy market continues to improve



Awareness of choice in the retail energy market has gradually improved over time across the NEM.

Nearly all residential and small business consumers understood they could choose from different energy retailers, and most believed they could choose different plans with the same retailer. *Residential* results are illustrated throughout this summary.

Consistent with previous years, the longer a jurisdiction has been deregulated, the more its consumers were aware that they can choose their energy company or plan. Awareness of choice was particularly low in Tasmania, the Rest of Queensland and the ACT, where there are fewer options available to consumers. Small business consumers had similar patterns of awareness across the jurisdictions.

Results from new questions revealed that fewer than half of householders surveyed thought they were on a contract, when in fact *all* technically are. There was also confusion regarding which specific type of offer they were on – including when prompted with explanations of the difference between standing and market offers. Around two-thirds reported that their energy company offers discounts, and this was more prevalent in areas that have been deregulated for longer (e.g. at 72% in Victoria).

A stable one in three continued to shop for a better deal and the majority found it easy to compare, but not as easy as other services

A third (33%) of residential consumers across the NEM had actively investigated energy offers in the past year, consistent with previous years.



Consumers who were more likely to have investigated their options were those exhibiting financial vulnerability, living in an embedded network, and/or more likely to have otherwise engaged with the market (e.g. recently approached by a retailer or switched provider or plan).

The majority (62%) of consumers maintained that it was easy to compare energy options, particularly those who were younger or preferred to speak a language other than English at home. However, consumers have continued to report that it is easier to compare banking, insurance and telecommunications services than energy offers.

Retailer and comparison websites are growing in popularity

General internet searches remained the most commonly cited method of investigating energy options. More specifically, the use of comparison websites and retailer websites has increased since 2016. Those who had not switched in the past five years or investigated options in the past year were also more likely than in 2016 to think they would use energy company websites if they *were* to look around.



EXECUTIVE SUMMARY

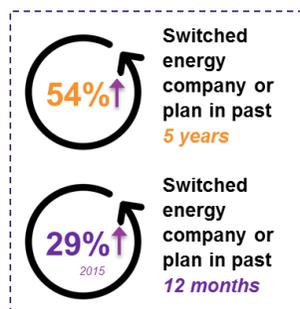
Nearly half of all residential consumers (47%) and two-fifths of small business consumers (38%) said they were aware of a website or service that could help with choosing an energy deal, with higher levels of recall in Victoria in particular (55%).

iSelect and Compare the Market continued to dominate this space. Unprompted recall of any government comparison website or campaign remained extremely low at just 2%, while *prompted* awareness of such sites reached 22%. This includes 9% prompted awareness of the federal government's *energymadeeasy* website.

Switching companies or plans has continued to trend upwards

More than half of residential consumers said they had switched energy company or plan in the past five years (54%), which is up since 2016 (49%), and more on par with 2015 (52%).

In the past 12 months, three in ten householders (29%) had switched energy company or plan, up significantly from 24% in 2015. This was largely driven by increased switching in NSW (at 33% - the highest of all jurisdictions this year), South Australia and South East Queensland. These switching rates are the highest for the four years of the survey and tend to remain more common in areas that have been deregulated for longer.



Despite consumers rating their ease of switching energy company or plan lower than for other industries, the actual switching rates for electricity were higher than all the other industries asked about in the survey.

Half of small business consumers and two in five residential consumers reported being approached by an energy company in the past year; steady against 2016. Phone calls and in-person visits were the most common.

Interest in looking for a better energy deal increased among both residential and small business consumers over the past year. Perhaps not surprisingly, those most dissatisfied with their energy retailer were more likely to be interested in exploring options. Those who had switched in the past five years were also more interested than those who had not switched, suggesting that when consumers do switch, they tend to find it worthwhile – as supported by the outcomes measures.

Motivations for switching remain largely price driven, and segmented

Intuitively, switching behaviour continues to be strongly driven by price perceptions, with residential consumers who had made a switch in the past five years citing discounts and then cheaper prices as their top reasons for switching, in line with previous years. Younger consumers and renters were also likely to cite moving home as a reason for switching – though this did not significantly impact overall switching rates.

When prompted with a list of common reasons for switching, discounts and the estimated competitive total bill amounts remained the most critical factors influencing the decision to switch.

Reflecting concerns and sensitivities highlighted in an in-depth vulnerable customer study for the AEMC in 2016, considerations regarding switching that were significantly more important for vulnerable customers were the discounts offered, the customer service on offer, and whether the price might change during the contract – with vulnerable customers particularly keen for certainty, to aid their tight budgeting.

Key reasons for looking but not switching tended to revolve around learning that their current deal was better, finding the process too difficult or confusing, or their company matching the offer.

Those who didn't switch or investigate options at all were most likely to say they were happy with their current retailer, too busy or that it would be too much of a hassle.



EXECUTIVE SUMMARY

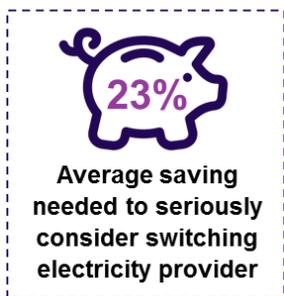
Younger residential consumers demonstrated some different values: they were more likely than other consumers to value the brand and reputation of the company, the availability of green energy plans, and being able to access new energy technologies. The latter two factors were among the least important factors for the average consumer.

The things consumers felt would motivate them to switch in the future were very similar to the factors cited by those who had switched in the past. This suggests that most consumers are assuming the same sorts of pressures and service designs that are in place today will be present in future.

Comparison sites are helping to improve attitudes to switching

Attitudes towards switching remained largely stable against previous years. However, consumers are finding it somewhat less complicated to compare energy options, and increasingly view energy companies with neutrality rather than mistrust.

Of particular note is that consumers who were aware of independent comparison websites were more likely to disagree with negative statements regarding switching, highlighting some of the benefits of such consumer engagement efforts.



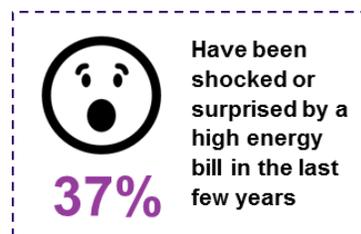
On average, consumers indicated they would need to see a saving of around a quarter of their typical bill in order to seriously consider switching – e.g. an average 23% off the electricity bill among householders.

On a quarterly basis, the desired savings equated to \$91 for residential electricity bills, \$66 for residential gas bills, \$133 for small business electricity bills and \$84 for small business gas bills.

CONSUMER OUTCOMES

Data from multiple years of the study suggest the energy market continues to mature across knowledge, confidence, behaviours and sentiment.

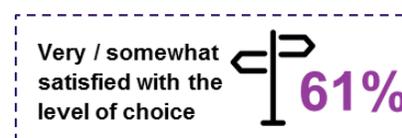
Many consumers had recently experienced bill shock



As context for understanding behaviours, two in five householders (37%) reported experiencing a high bill shock in recent years, along with 39% of small businesses. The average quarterly equivalent 'shock' bill was \$268 more than usual for householders and \$319 for small business consumers.

Shock bills were more common among some of the most vulnerable consumers (e.g. Indigenous Australians, tenants and those with financial stress). Key indicators of engagement with the market were also associated with bill shock, suggesting this is a driver of market engagement.

Consumer choice is stable, while confidence is improving



Satisfaction with the level of choice in energy retailers was at 61% fairly/very satisfied, remaining significantly higher than the 2014 benchmark of 51%. Results continue to vary by jurisdiction.

Interestingly, consumers were evenly split on whether there was too much or not enough choice. Those who felt there was just the right amount were more likely to have been younger and confident in finding the right information.

Participants were asked for the first time whether they had made a conscious decision to be on their current energy contract; four in five said yes. This was higher among those who were more engaged with the market, while vulnerable consumers were more likely to say their retailer had just put them on their current contract.



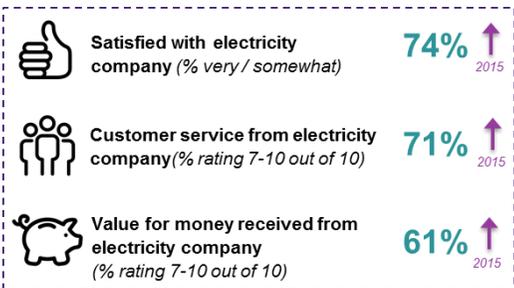
EXECUTIVE SUMMARY

Seven in ten consumers felt quite or very confident regarding their ability to find the right information to choose a suitable energy plan, with confidence having increased among residential consumers – from 54% rating their confidence 7 or more out of 10 in 2015, to 68% in 2017. The results also provide clear indications confidence is driven by active market engagement.

Perceptions of energy companies have continued to improve

The majority of consumers were satisfied with their current energy company, with satisfaction increasing among residential electricity consumers for the second consecutive year – from 66% in 2014 to 74% this year.

Those more likely to say they were satisfied with their energy company included those from a non-English speaking background, those aware of at least one government comparison website, or living within an embedded network. In contrast, those who had actively investigated energy options were more likely to say they were dissatisfied with their current retailer.



Ratings of customer service was high, having risen steadily over time. Value for money among residential electricity consumers also increased over time, though gas consumers rated their provider's value for money lower than last year, likely reflecting recent price rises.

Meanwhile, poor ratings of value for money have increased over time among small business energy consumers. Top reasons provided for value for money ratings among householders and businesses related to (both positive and negative) prices, discounts and customer service.

Most consumers who had switched continued to be happy with both their decision to switch (e.g. 82% of residents), and the process involved (81%).

New energy technologies are generating buzz – especially batteries

Adoption of new energy technologies:

- 25%** already have a smart meter
19% are likely to in the next 2yrs
- 20%** already have solar panels
18% are likely to in the next 2yrs
- 11%** already have solar hot water
19% are likely to in the next 2yrs
- 4%** already have a home energy management system
18% are likely to in the next 2yrs
- 3%** already have a remote controlled appliance app
18% are likely to in the next 2yrs
- 2%** already have storage batteries
21% are likely to in the next 2yrs
- 1%** already have an electric vehicle
12% are likely to in the next 2yrs

New energy technology uptake was the highest for smart meters (25% of householders reported having one) and solar panels (20%).

Notably, there appeared to be significant underestimation of smart meters in Victoria, where *all* households have them but only 58% thought they did.

Quite a lot of consumers across the NEM (40%) intend to acquire one or more of the technologies asked about in the next two years. The highest stated intention was for storage batteries (21%), and this was up from 16% in 2016.

Current and intended adoption rates for new energy technologies were higher among males, those from a non-English-speaking background, home owners and those generally more engaged with the market. Older consumers were more likely to have already installed solar panels, while younger consumers were more likely to be interested in acquiring most of the other technologies.

Those living in embedded networks would like more choice

Across the NEM, 3% of residential consumers and 4% of small business consumers said they were within an embedded network. Most of them (80%) felt it would be very important for them to have a choice between different energy providers and plans in future.

INTRODUCTION



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BACKGROUND AND OBJECTIVES

The Council of Australian Governments (COAG) established the Australian Energy Market Commission (AEMC) in 2005. As part of governance arrangements to oversee the nation's main energy markets, the AEMC's 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 Electricity Market (NEM). The NEM includes Queensland, New South Wales, the Australian Capital Territory, Victoria, South Australia and Tasmania.

However, for the purposes of this report we refer to the National *Energy* Market because results cover both electricity and gas, and 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.

The first NEM-wide review of competition in all markets was completed in August 2014. The 2017 review is the fourth comparison of retail competition in the electricity and gas sectors. The AEMC is required to complete its fourth review by 30 June, 2017 ('the 2017 review') and required independent research with two key market dimensions to inform its review: residential and small business retail customers in the gas and electricity sectors.

The AEMC commissioned Newgate Research to conduct this year's research with residential and small business electricity and mains connected natural gas consumers, to inform its 2017 review.

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 full retail contestability including opportunities to choose and/or change their electricity and/or natural gas retailer or plan;
- The extent to which they participate in the market, including the prevalence of customers switching between retailers or plans;
- The rationale or motivation underlying their decisions to switch, or not switch, electricity and/or natural gas retailer, plan or deal;
- Their satisfaction levels and preferences;
- Information preferences, including the extent to which they are aware of independent comparator websites, and more generally, whether they are confident that they can access the right information to choose an energy deal that suits their needs;
- The current and potential impact of new and emerging technologies on competition in retail energy markets; and
- Awareness and incidence of embedded networks and how these impact consumer perceptions of the energy market.

The questionnaire was finalised in close consultation with the AEMC. A copy can be found in Appendix 1.



METHODOLOGY

For the 2017 review, a quantitative survey was conducted with n=2,147 residential consumers and n=550 small business consumers across seven jurisdictions. The table below shows the 2017 sample sizes and associated maximum margins of error (MoE), at the 95% confidence level, for residential and small business consumers. Throughout the report results are presented separately for these two cohorts.

Jurisdiction	TOTAL	Residential		Small Business	
	n	n	MoE (+/-)	n	MoE (+/-)
South East Queensland	499	399	4.9%	100	9.8%
Rest of Queensland	200	150	8.0%	50	13.9%
New South Wales	501	400	4.9%	101	9.8%
Australian Capital Territory	249	200	6.9%	49	14.0%
Victoria	500	400	4.9%	100	9.8%
Tasmania	250	200	6.9%	50	13.9%
South Australia	498	398	4.9%	100	9.8%
TOTAL	2,697	2,147	2.1%	550	4.2%

All 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. Small businesses qualified for the survey if their quarterly electricity bill was below a certain amount as outlined in the questionnaire in Appendix 1. Further, small businesses were only asked the series of questions about gas if their quarterly gas bill was below a certain amount.

This study was carried out in accordance with ISO 20252:2012, the quality standard for market and social research, to which Newgate is accredited.



METHODOLOGY CONT.

Survey fieldwork was undertaken by TKW Research Group using a mixed-mode approach in order to reach a broad range of consumers across each jurisdiction. For residential surveying via computer assisted telephone interviewing (CATI), sample was sourced randomly via the 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 the survey online, sample was sourced from a leading online panel provider, Research Now. The small business interviewing was conducted via CATI using the White Pages' small business sample.

A pilot of n=30 CATI interviews and n=64 online survey completions was conducted among residential consumers between 18-30 January 2017 and fieldwork continued until 23 February 2017. The median CATI interview length was 22 minutes for residential consumers and 19 minutes for small businesses, and 17.5 minutes for the online survey.

Quotas were set for the methodology for both residential and small business consumers as follows. 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 1.

Methodology quotas (n=)	Residential	Small Business	Total
CATI	384	550	934
Online	1,766	-	1,766
Total	2,150	550	2,700

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. The weighting proportions used are outlined over the page.

A participant profile has been included in Appendix Two to show the mix of consumers included in the sample.



METHODOLOGY *CONT.*

Results were weighted to representative proportions of the population in each jurisdiction, using a mix of 2011 ABS Census data and the incidence rates of main or joint decision makers obtained in the online survey:

Weighting: Residential & Small Business	Total
South East Queensland Capital	11%
South East Queensland Other	5%
Rest of Queensland	6%
New South Wales Capital	24%
New South Wales Other	12%
Australian Capital Territory	2%
Victoria Capital	21%
Victoria Other	7%
Tasmania Capital	1%
Tasmania Other	2%
South Australia Capital	7%
South Australia 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 years of age	13%	15%
35-54 years of age	14%	19%
55+ years of age	21%	18%
TOTAL	100%	100%



NOTES TO THE READER

This report presents the findings of the fourth wave of quantitative research measuring consumer attitudes towards energy markets. The first chapter focuses on the results across the NEM, with comparisons over time and between jurisdictions where appropriate. Also included are chapters for each jurisdiction, for readers interested in consumer opinions in their own state or territory.

Unless otherwise stated, results throughout relate to *residential* consumers. For key questions we have also shown results for small business consumers but otherwise only refer to small business results if the results are quite different to those of residential consumers.

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, New South Wales, the Australian Capital Territory, Victoria and South Australia. Tasmania and the rest of Queensland are therefore excluded from the NEM results herein to ensure comparability across time. 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.

The “base” (i.e. number and type of respondents) and the actual survey questions are shown in the footers. The results throughout the report are weighted to reflect population characteristics and enhance data accuracy; please see the previous page for further information on the specific weights that were 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 over time have been noted year-on-year (i.e. against 2016), and against 2015 and 2014.

Significant differences are also noted across jurisdictions. However, 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.

Statistically significant differences have also been noted across demographic and behavioural sub-groups, where meaningful in the context of the question and relevant to the objectives of the study. Where differences have not been discussed, it should be assumed that no differences existed or were noteworthy.

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 themes.
- Results may not always total 100% due to rounding. For multiple response questions, 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.
- Question-specific notes about data comparability and other analysis considerations are noted in the information beneath each chart / table.
- Throughout the report the term Nett has been used where coded responses that are similar in nature have been grouped into one overarching theme. e.g. ratings of a 7 or higher out of ten were nett good to excellent.
- References to residential consumers exhibiting indicators of financial vulnerability relate to those who have reported at least one of the following traits: in the last 12 months had unforeseen circumstances that severely affected their financial situation, a reduction in household income, or had their energy service disconnected due to late/missed payments, or were currently experiencing financial difficulty, in receipt of a government rebate or concession on their energy bills, or a special payment arrangement due to financial difficulty.

For detailed results, please refer to the additional sub-group tables at NEM and jurisdictional levels, which are available as an attachment to this report.

RESEARCH FINDINGS: NATIONAL ENERGY MARKET



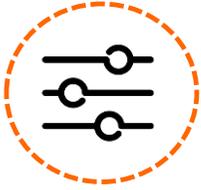
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CONSUMER ACTIVITY

*How are consumers engaging
in the energy market?*

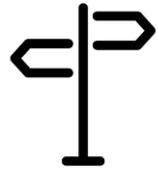


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CONSUMER ACTIVITY (SNAPSHOT)

RESIDENTIAL CONSUMERS



Awareness of being able to choose



Electricity



Gas

Company

94% ↑
2015

92%

Plan

86% ↑

81% ↑

Prompted recall of at least one independent government comparison website



22%



Investigated offers in the past 12 months



Switched energy company or plan in past 5 years



Switched energy company or plan in past 12 months

Top reasons for not investigating or switching (%):



Happy with current retailer (26%)



Too much of a hassle (14%)



Too busy / didn't have time (12%)

Top reasons for switching (%):



2015



Was offered a discount / better price (33%)

2015



Wanted a cheaper price (32%)



CONSUMER KNOWLEDGE

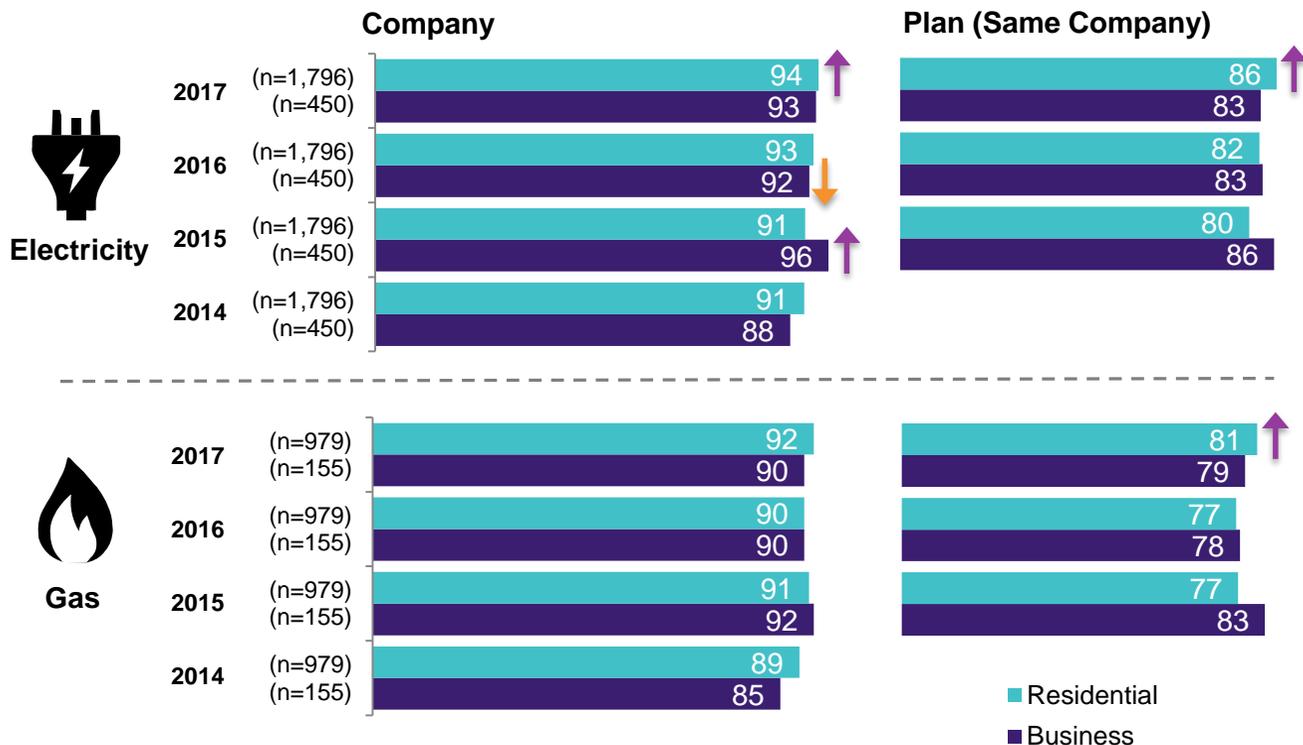


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AWARENESS OF ABILITY TO CHOOSE

Awareness of ability to choose energy company or plan (% True)



Across the NEM, nearly all consumers understood they could choose from different energy companies: 94% of residential consumers thought this was true for electricity companies, and 92% for gas companies.

Most also thought they could change plans with the same company. Although awareness of this option remained lower than the option to switch company, this has improved significantly over time:

- From 80% for electricity plans in 2014, to 84% in 2017; and
- From 77% for gas plans in 2015, to 81% in 2017.

Awareness of the ability to switch was very consistent with small business consumers.

Base: NEM electricity participants (n=1,797) or those with mains gas (n=979).

Q13a. True or false: People in your area can choose their electricity company? / Q13b. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms? / Q13c. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms? / Q13d. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms?



AWARENESS OF ABILITY TO CHOOSE *CONT.*

Consistent with previous years, the longer each jurisdiction has been deregulated, the more consumers in that jurisdiction are aware that they can choose their energy company or plan.

Awareness of choice was particularly low in Tasmania, the Rest of Queensland and the ACT, where there are fewer options available to consumers. Small business consumers had similar patterns of awareness across the jurisdictions.

RESIDENTIAL CONSUMER AWARENESS OF...	NEM (n=1,797)	SEQ (n=399)	NSW (n=400)	ACT (n=200)	VIC (n=400)	SA (n=398)	ROQ (n=150)	TAS (n=200)
Ability to choose their company (% True)								
Electricity	94%	92%	94%	66% ↓	97%	97%	45% ↓	7% ↓
Gas	92%	88%	92%	51% ↓	95%	92%	!!	!!
Ability to choose from a range of plans (% True)								
Electricity	86%	81%	86%	62% ↓	90%	88%	42% ↓	11% ↓
Gas	81%	62% ↓	84%	46% ↓	85%	78%	!!	!!

Base: All residential participants (n=2,147) or those with mains gas (n=999).

Q13a-d. People in your state or territory can choose their electricity / gas company / People in your state or territory can choose from a range of different types of electricity / gas plans, price structures, contract lengths and terms.



CONTRACTS, DISCOUNTS AND OFFERS

There appeared to be quite a lot of confusion among consumers regarding the nature of their arrangements with their energy companies – even after the difference between market and standing retail offers was explained. Indeed, it is important to note these results are perception-based and not intended to be an accurate reflection of actual arrangements. These questions were introduced in 2017.

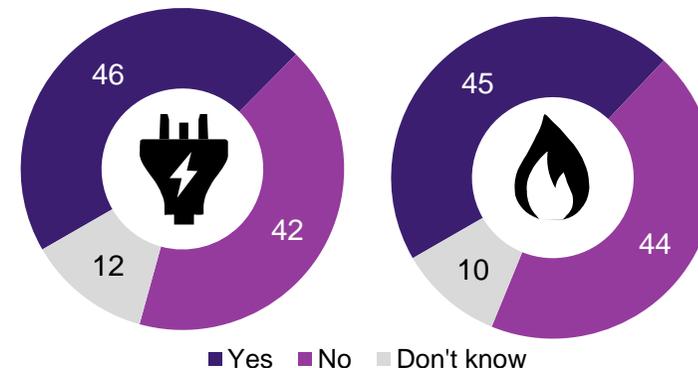
When asked whether they were currently on 'any kind of contract or plan' for their energy service, nearly half of the residential consumers surveyed believed they were not on a contract (42% electricity, 44% gas). Given that technically speaking, all consumers are on some kind of contract or plan, this suggests that consumers' colloquial understanding of retail contracts was more akin to the technical definition of a market retail contract. Results were similar for small business consumers.

Around two thirds of residential consumers reported receiving rewards or discounts for paying on time or via direct debit (65% for electricity providers and 63% for gas). The longer each jurisdiction has had deregulated electricity prices, the more likely its residential consumers were to report receiving discounts – for example, 72% of those in Victoria said they were receiving discounts from their electricity service, followed by 70% in SA and 66% in NSW compared to just 35% in the ACT where prices are not deregulated. Results were very consistent for small business consumers.

Residential consumers in the online survey were also asked whether they knew if they were on a market or standing offer. The majority did not know (65%). Even after being given a description of the two types of offers, a third still remained unsure (33%). Slightly fewer than half thought they were on a market offer (44%), however when compared to the 65% who indicated they were currently receiving discounts (and were thus likely to be on a market offer), this further demonstrates the level of confusion about the types of offers consumers are on.

The longer each jurisdiction has been deregulated, the more likely its residential consumers were to report being on a market offer: 51% in Victoria, 44% in SA, 42% in NSW vs 37% in SEQ, 26% in the ACT, 17% in regional Queensland, 14% in Tasmania).

Currently *on a contract* – residential consumers (%)



Currently *receiving rewards or discounts*



Type of offer currently on		Unprompted	Prompted
⚡	Market	20%	44%
	Standing	14%	24%
	Don't know	65%	33%
🔥	Market	N/A	51%
	Standing	N/A	20%
	Don't know	N/A	28%

Base: NEM electricity participants (n=1,797 residential, n=450 small business) or those with mains gas (n=979 residential, n=155 small business).

Q64/Q73. Are you currently on any kind of contract or plan for your electricity/gas service?. Q70/Q76. Does your electricity/gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? / Q71/Q72/Q77. Do you know if you are on a market offer or a standing offer for your electricity/gas service?

For electricity, 1% selected 'other' for the type of offer they were on.

INVESTIGATING OPTIONS



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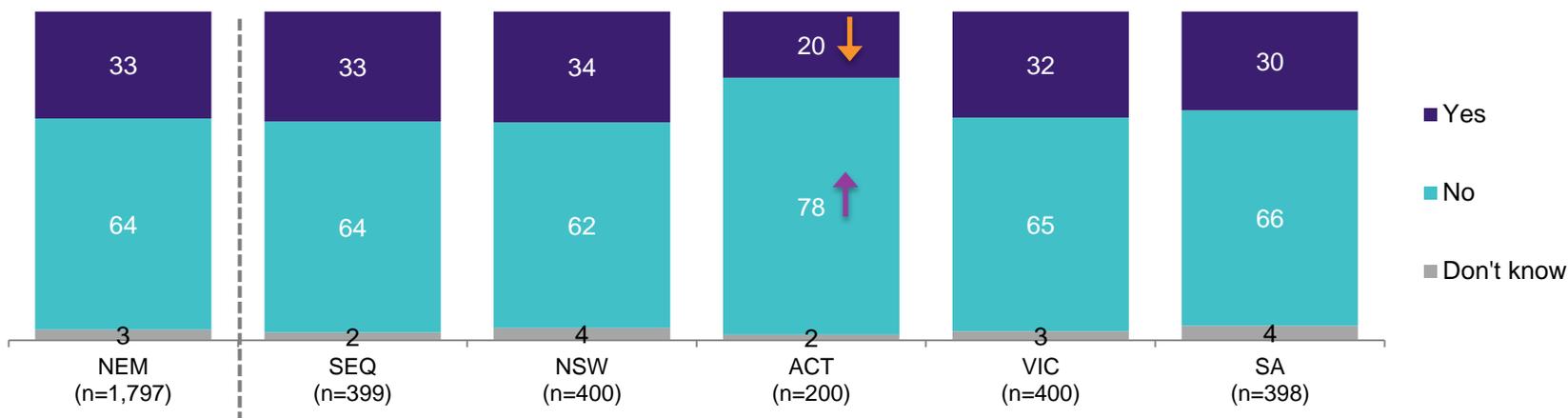
ACTIVE INVESTIGATION OF OFFERS

Around a third of consumers in the NEM had actively investigated energy offers in the past year (33% residential, 36% small business), consistent with previous years.

This was largely consistent across jurisdictions, though investigation rates remained relatively lower among ACT consumers, at 20% of residential consumers, while the same was true of only 8% of small business consumers there. In contrast, nearly half of all small business consumers in South Australia had investigated their energy options within the past year (47%), significantly above the NEM average of 36% among small businesses.

Residential consumers who had investigated their options were more likely to: exhibit some indication of financial vulnerability (37% vs. 28% of those without any of the vulnerability indicators assessed); say they were on a current contract* for electricity (41% vs. 28% not on a contract) or gas (39% vs. 30%); and/or be part of an embedded network (52% vs. 32% all other consumers). They were also more likely to have been approached by an energy company in the past year (44% vs. 27%), to think they were on a market offer for electricity (44% vs. 32% of those on a standing offer) or gas (40% vs. 27%), and they were much more likely to have gone on to switch energy provider or plan in the past year (59% vs. 22% of those who had not switched).

Proportion of residential consumers who **actively investigated** offers in the last 12 months (%)



Base: Residential NEM participants (n=1,797). Not asked in Tasmania or rest of Queensland.

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

* NB: Consumer understanding of what constitutes a contract appears to relate to technical definitions of market retail contracts.



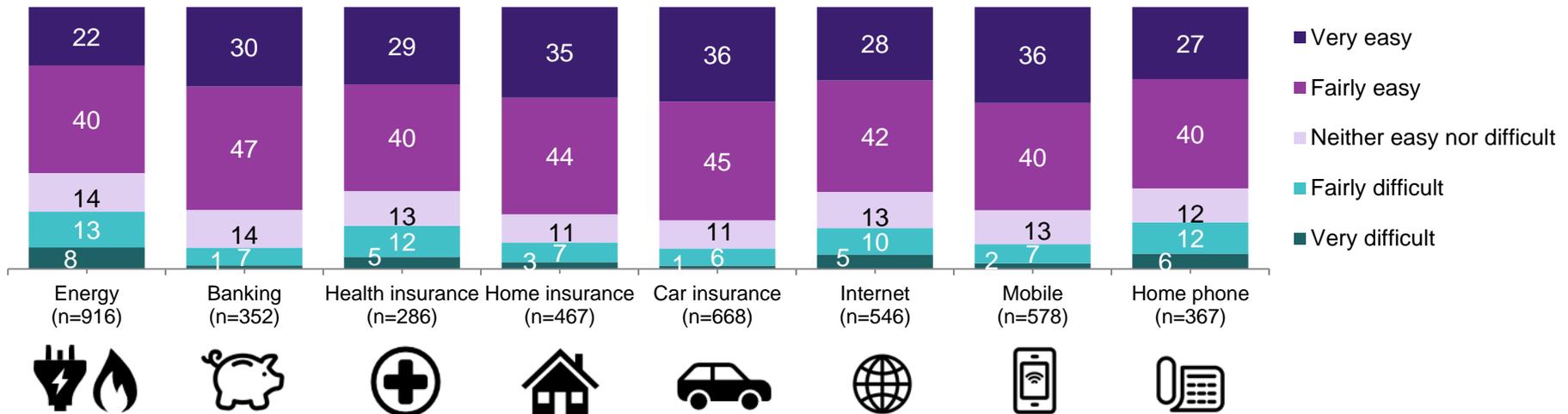
EASE OF COMPARING ENERGY OPTIONS VS. OTHER INDUSTRIES AMONG SWITCHERS

The majority of residential consumers who had switched energy company or plan in the last 5 years maintained that it was easy to compare energy options (nett 62% easy). One in five (22%) said it was very easy – while consistent with previous years, this lagged comparable results in other sectors including banking, insurance and telecommunications (ranging from 27% to 36% for very easy). While there was an increase in switchers saying it was difficult to compare energy options from 16% nett very / fairly difficult in 2016 to 21% this year, this has stayed fairly low and stable over time (18% in 2015). This coincides with a decline since 2015 in the proportion who felt it was neither easy nor difficult (from 19% to 14%).

Those who found it easy to compare tended to be more confident in their ability to find the right information (72% of those who rated their confidence at 7-10 thought it was easy vs. 37% who gave a confidence rating of 4-6, and 14% who rated their confidence below 4), as did younger consumers (e.g. 69% of 18-24-year-olds found it easy vs. 57% of those aged 55+). Interestingly, consumers who prefer to speak a language other than English at home were also more likely to find it easy to compare energy options (77% vs. 60% of others).

Meanwhile, a similar two-thirds of small business consumers felt it was easy to investigate energy options (nett 67%), remaining higher than the benchmark result of 57% in 2015. The proportion who said the process was very easy returned to 2015 levels (14%), following a spike last year to 25%.

Ratings of ease of switching across industries – residential consumers (%)

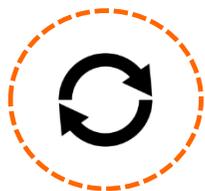


Base: Residential NEM participants who switched energy company or plan in the past 5 years (n=913) and those who switched in other industries (n=298-634). Don't know omitted, <5%. Q51. The last time you switched your energy company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? / QD7a. 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?

INFORMATION SOURCES



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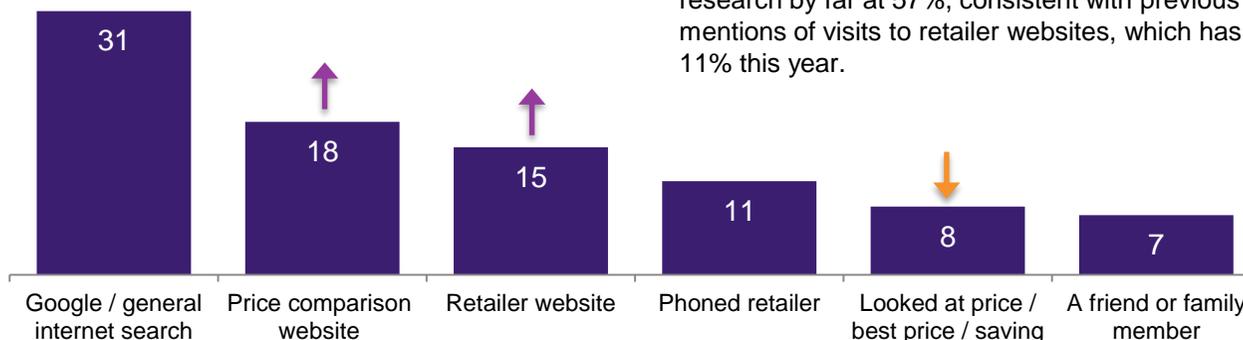
INFORMATION SOURCES FOR COMPARING ENERGY OPTIONS

General internet searching remained the most common method of finding information among those who had either switched in the past five years or at least investigated their options in the past 12 months. At 31% this has been steady over recent years.

There has, however, been an increase in more specific sources cited. The next most popular sources were price comparison websites (up from 13% in 2016 to 18% this year) and retailer websites (up from 9% in 2016 to 15%).

Meanwhile, there has been a decrease in the proportion of those who said they simply looked at the price or saving (from 14% in 2016 to 8%). Although not charted here due to low levels, visits from door-to-door salespeople have continued to fall (from 6% in 2015 to 2%).

Information sources used by residential consumers to investigate or switch – top mentions (%)



Some consumer group differences were evident for some sources. For example, younger consumers were more likely to have conducted a general search online (e.g. 34% of <35s vs. 26% of 55+ year olds), while older consumers were more likely to have phoned a retailer directly (14% of 55+ vs. 6% of <35s). Consumers who prefer to speak a language other than English were less likely to have used a price comparison website (7% vs. 19%) and more likely to have said they simply looked at the price (15% vs. 7%); similarly, Indigenous consumers were also less likely to have used a comparator site (3% vs. 16% of non-Indigenous consumers).

The top two information sources were consistent with preferences among small business consumers, with a similar increase since 2015 in the use of price comparison websites (from 10% to 18%).

Those who had not switched energy company or plan in the past five years nor investigated their options in the last 12 months were asked what would be their most preferred source of information if they *did* want to investigate. General online searching was the most commonly cited expected method of research by far at 57%, consistent with previous years. This was followed by mentions of visits to retailer websites, which has increased from 7% in 2016 to 11% this year.

Base: Residential NEM participants who investigated options in the past 12 months or switched in the past 5 years (n=1,078).

Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? / You mentioned you previously investigated different offers or options that you could potentially switch to. / Base: Residential NEM participants who did not investigate options in the past 12 months or switched in the past 5 years (n=719).

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



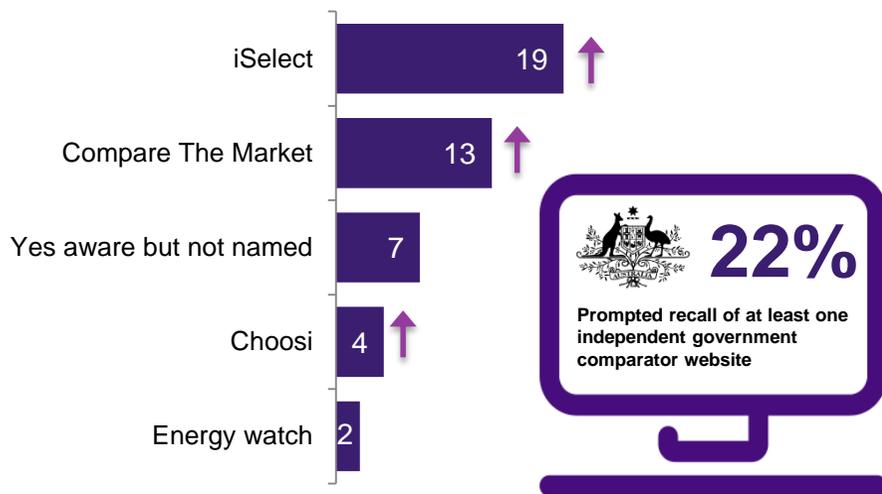
AWARENESS OF COMPARISON WEBSITES

Nearly half of residential NEM consumers (nett 47%) and two-fifths of small business consumers (nett 38%) said they were aware of a comparison website or service that could help with choosing a good energy deal.

Those in Victoria were more likely to have said they were aware of at least one comparison website or service (nett 55%), with lower levels of unprompted recall of any such sites in the ACT (nett 27%), regional Queensland (21%) and Tasmania (7%).

iSelect and Compare the Market remained the two most commonly named websites, with unprompted recall of iSelect up from 13% in 2015 to 19% and Compare the Market up for the third consecutive year (from 2% in 2014 to 13%). There was also some unprompted recall of Choosi, which has gradually increased since 2014 (from 2% to 4%). Results and trends were similar for small business consumers.

Unprompted awareness of comparison websites – residential consumers (%)



Awareness of independent government comparator websites

Unprompted recall of any government comparison website or campaign among residential consumers remained extremely low at nett 2%, up from 1% in 2014.

When prompted with the names of specific websites or campaigns, recall jumped to nett 22% of all NEM residential consumers. Note that comparisons over time for this composite metric should be made with caution, as it includes the addition of new websites or campaigns at various points in time across various jurisdictions.

Awareness was higher among males (25%), those in an embedded network (52%), those who had switched in the last year (29%) or looked into their options (35%), Indigenous consumers (44%) and those from a non-English speaking background (33%).

Overall, there was nett 9% awareness of the Australian Energy Regulator's *energymadeeasy* website, which is steady against 2015 but lower than the 2014 benchmark of nett 17%. Recall of this site was higher in NSW and SEQ (both nett 13%), with similar results for small businesses.

Base: Residential NEM participants (n=1,796). Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their home? Any others? // Q39 / Q40 / Q63 / Q82. Have you heard of the independent government comparator website called *energymadeeasy* / Victorian Energy Compare / My Power Planner / *yourenergy.nsw.gov.au* / Power in Your Hands / EnergySave?

SWITCHING BEHAVIOUR



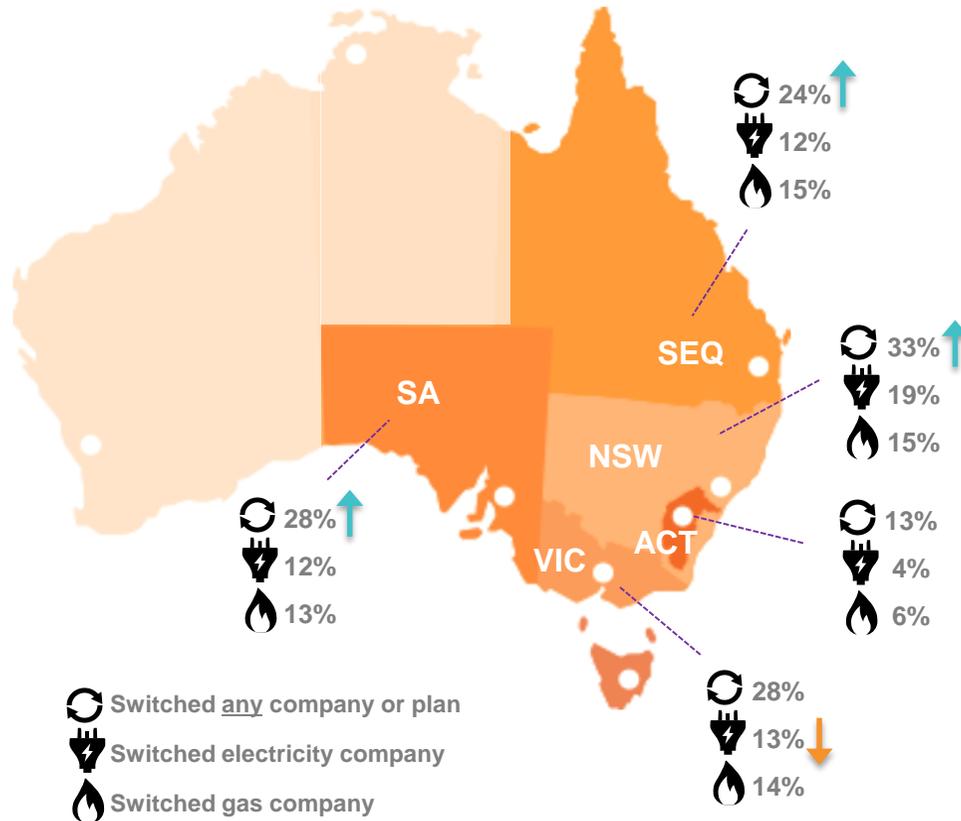
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SWITCHING BEHAVIOUR AT A GLANCE

SWITCHED IN THE PAST 12 MONTHS

Switched in the past 12 months – residential consumers (% at least once)



Three in ten residential consumers across the NEM had switched either their energy company or plan in the past 12 months (29%).

This represents a significant increase over the longer term, up from 24% in 2015 and largely driven by increases in NSW (33%, up from 24% in 2015), South Australia (28%, up from 19% in 2015) and in South East Queensland (24% this year, up from 18% in 2016).

Consistent with previous years, the level of switching was highest in jurisdictions that have been deregulated for the longest. Switching rates for the jurisdictions (including small business consumers) are further detailed on the following pages and in the jurisdiction chapters.

Importantly, the following consumers were significantly more likely to have switched company or plan:

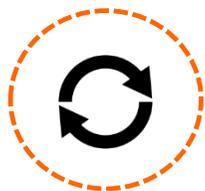
- Those who were aware of any price comparator websites (38% vs. 26%) of those who were not aware of any); and
- Those who had been approached by an energy company in the past 12 months (37% vs. 24% of those who had not).

Switching among small businesses remained in line with 2016 and below 2015 levels, at 22% this year. Small business consumers aware of energy comparison websites were also more likely to have switched, at 35% vs. 18% among those unaware of these sites, as were those approached directly by an energy company (30% vs 12% of those not approached).

These results highlight the importance of both price comparison websites and energy companies approaching consumers in stimulating market activity.

Base: NEM residential participants (n=1,797) or those with mains gas (n=979). Not asked in Tasmania or rest of Queensland. / Q17. In the past 12 months/ five years, how many times have you changed the following?

⬆️⬆️ Arrows denote significant differences compared to previous periods at the 95% confidence level



SWITCHING BEHAVIOUR AT A GLANCE

SWITCHED AT LEAST ONCE IN THE PAST 12 MONTHS

Residential	NEM (n=1,797)	SEQ (n=399)	NSW (n=400)	ACT (n=200)	VIC (n=400)	SA (n=398)
Electricity Company	15%	12%	19% ↑	4% ↓	13% ↓	12%
Electricity Plan	18%	15%	19%	10% ↓	17%	20% ↑
TOTAL Electricity Company / Plan	27%	23%	31%	12%	24%	27%
TOTAL Electricity or Gas Company / Plan	29%	24% ↑	33% ↑	13%	28%	28% ↑
Consumers with mains gas	(n=979)	(n=84)	(n=201)	(n=137)	(n=309)	(n=248)
Gas Company	14%	15% ↑	15%	6% ↓	14%	13%
Gas Plan	15%	12%	15%	9%	15%	18%
TOTAL Gas Company / Plan	23%	19%	23%	10%	23%	26%

Small Business	(n=450)	(n=100)	(n=101)	(n=49)	(n=100)	(n=100)
Electricity Company	12%	11%	16%	0%	10%	10%
Electricity Plan	12%	15%	12%	2% ↓	9%	15%
TOTAL Electricity Company / Plan	19%	20%	22%	2%	15%	21%
TOTAL Electricity or Gas Company / Plan	22%	22%	23%	2%	21%	22%
Consumers with mains gas	(n=155)	(n=13!!)	(n=29)	(n=12!!)	(n=56)	(n=45)
Gas Company	9%	!!	17%	!!	7%	6%
Gas Plan	13%	!!	10%	!!	14%	12%
TOTAL Gas Company / Plan	18%	!!	20%	!!	17%	16%

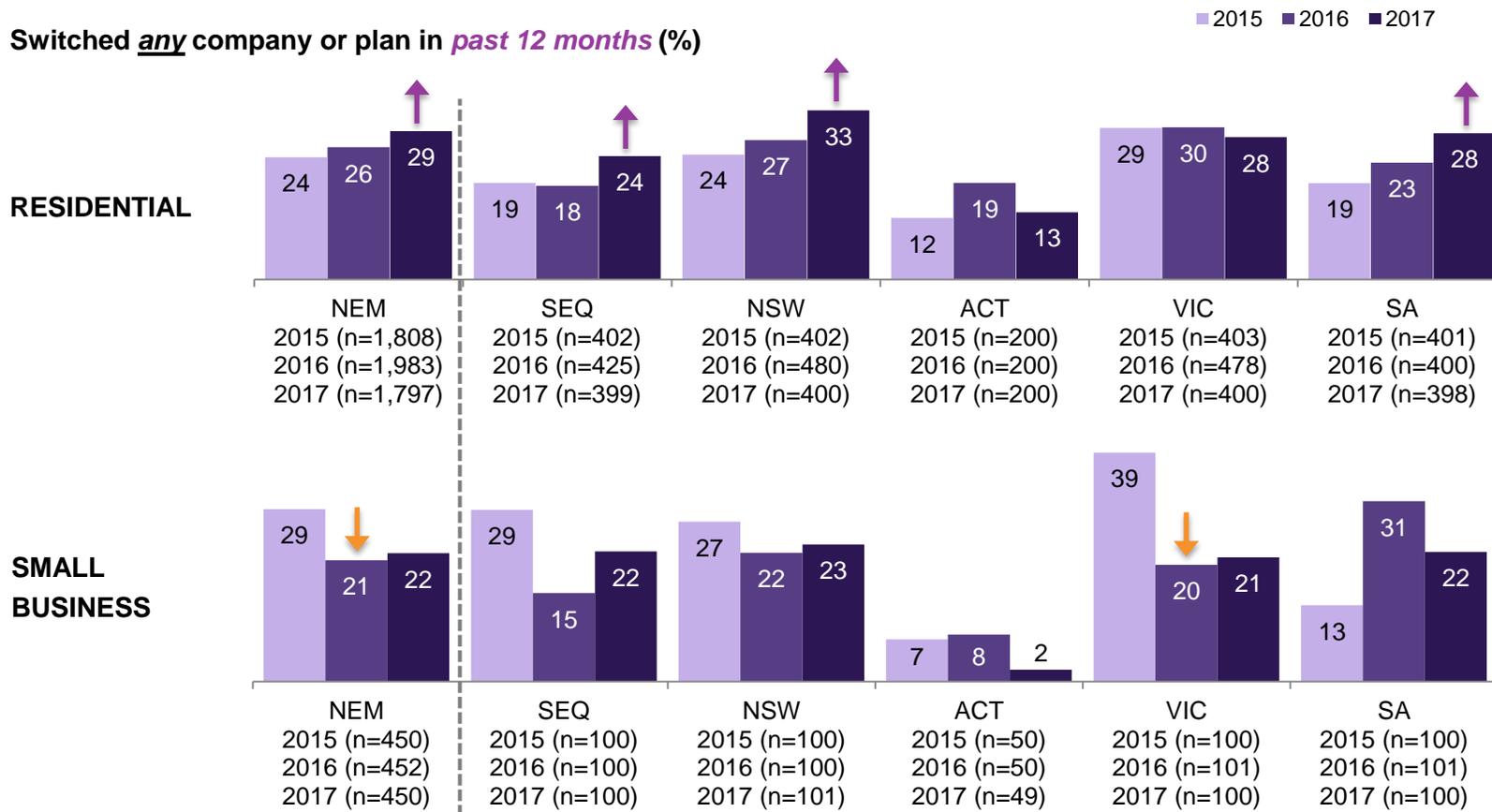
Base: NEM participants (residential n=1,797, small business n=450) or those with mains gas (residential n=979, small business n=155). Not asked in Tasmania or rest of Queensland. / Q17. In the past 12 months, how many times have you changed the following?

!! Extremely low base size: results omitted

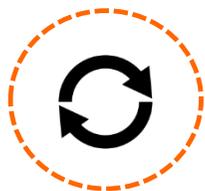


SWITCHING BY JURISDICTION OVER TIME

SWITCHED AT LEAST ONCE IN THE PAST 12 MONTHS



Base: NEM participants (as per chart) or those with mains gas (as per chart). Not asked in Tasmania or rest of Queensland. / Q17. In the past 12 months, how many times have you changed the following?

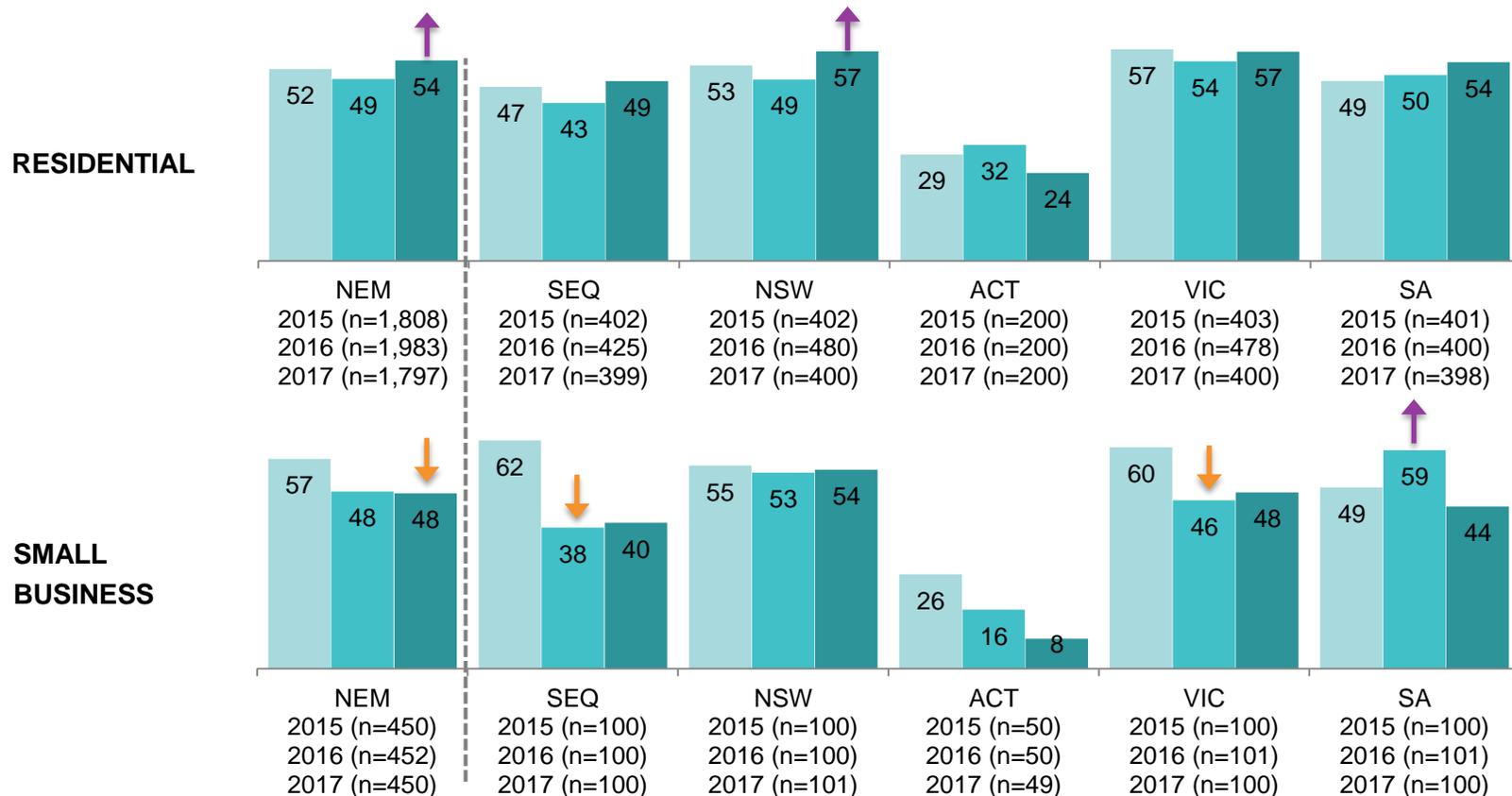


SWITCHING BY JURISDICTION OVER TIME

SWITCHED AT LEAST ONCE IN THE PAST 5 YEARS

Switched any company or plan in *past 5 years* (%)

■ 2015 ■ 2016 ■ 2017



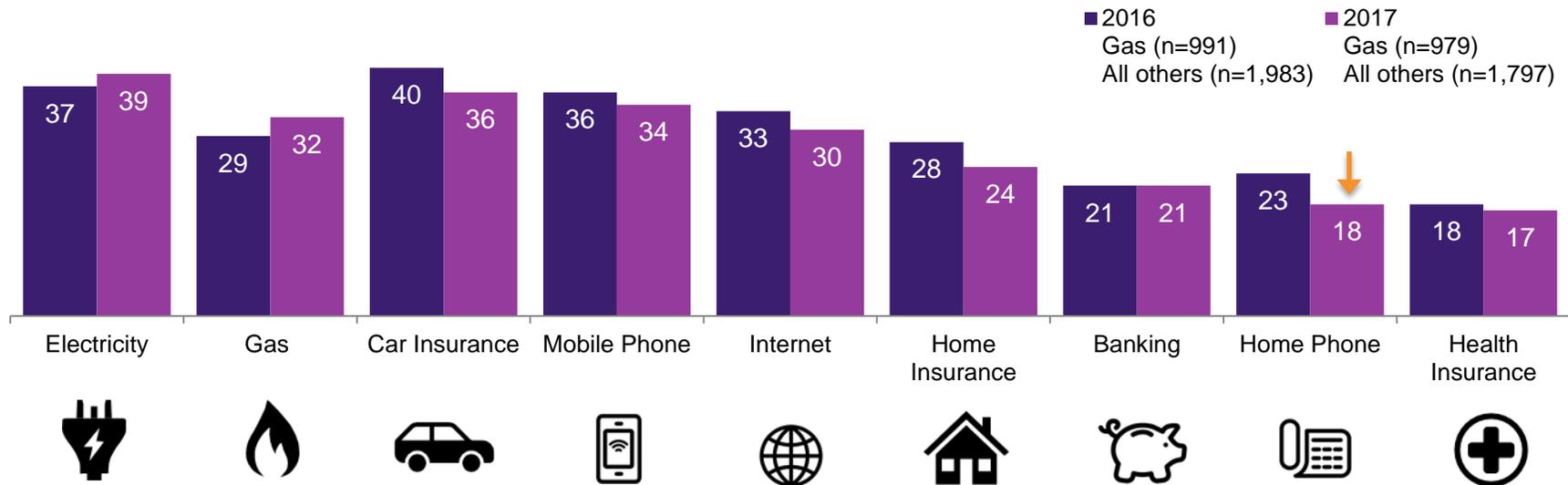
Base: NEM participants (as per chart) or those with mains gas (as per chart). Not asked in Tasmania or rest of Queensland.
 Q17. In the past 5 years, how many times have you changed the following?



RATES OF SWITCHING COMPANIES ACROSS VARIOUS INDUSTRIES

Despite consumers rating their ease of switching energy company or plan comparatively lower than other industries, last-5-year rates of switching electricity company were higher this year (at 39%) than for all other industries asked about. Gas company switching rates (32%) were similar to internet providers (30%) and mobile phone providers (34%). These results were fairly consistent with the trends reported in previous years, although in 2016, rates of switching car insurers were slightly higher than electricity (40% vs. 37%).

Proportion (%) of residential consumers who *switched company in the last 5 years*



Base: Residential NEM participants (n=1,797) or those with mains gas (n=979). Not asked in Tasmania or rest of Queensland. / Q17. In the past five years, how many times have you changed the following? / Base: Residential NEM participants (n=1,762). / QD7. 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?



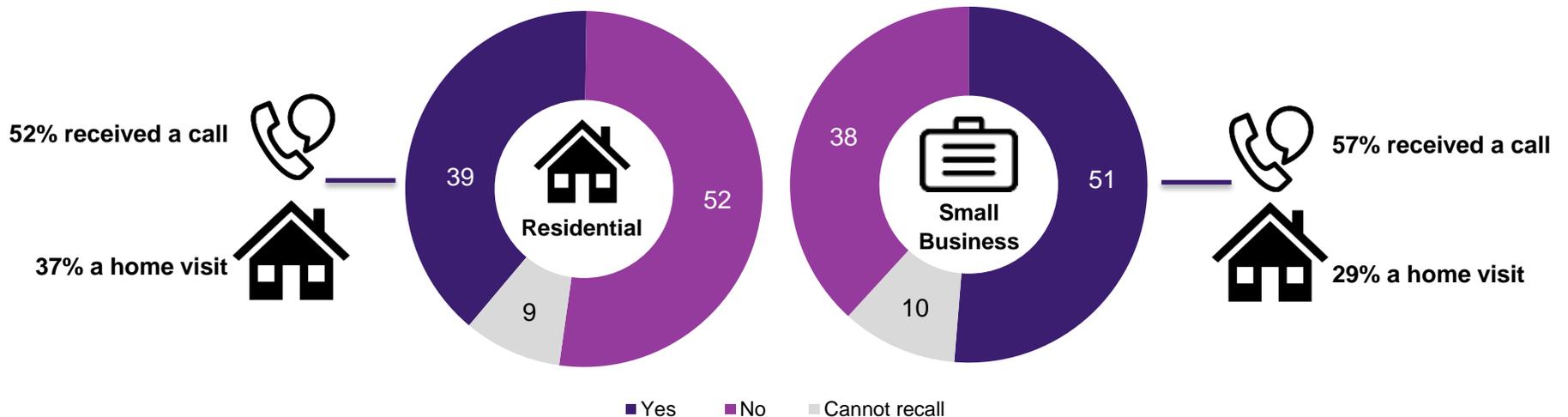
APPROACHED BY AN ENERGY COMPANY

Four in ten residential consumers had been approached by an energy company in the past 12 months (39%). This result has remained steady for the last three years following an initial decline from 51% in 2014. By comparison, small businesses were far more likely to have been approached (51%), and this has remained largely stable over time.

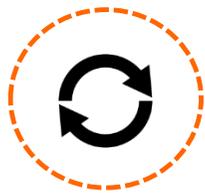
Consistent with previous years, consumers in jurisdictions that have been deregulated for longer were more likely to have been approached. For example, 49% of Victorian residents were approached, followed by 41% in NSW and 34% in South Australia, compared with just 25% in South East Queensland. Meanwhile, while just 14% in the ACT reported being approached.

For both consumer types, the top approach method mentioned was via telephone or visits to their home / business.

Residents and small businesses *approached by an energy company* (%)



Base: NEM participants (residential n=1,797, small business n=450) / Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?
Base: NEM participants approached by an energy company (residential n= 621, small business n=211). / Q18b. In what ways were you approached by an energy company? Results shown are for telephone calls and door to door visits – among those approached.



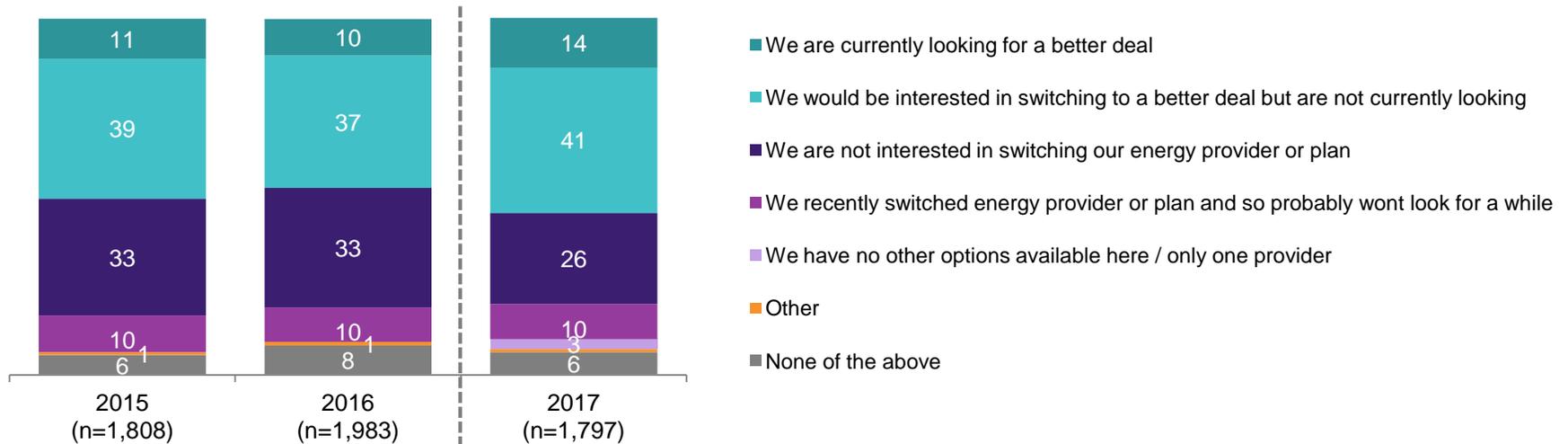
INTEREST IN SWITCHING IN THE FUTURE

The proportion of residential consumers interested in switching to a better deal increased this year: nett 55% were currently looking or interested vs. 47% in 2016. An even greater change was evident among small businesses, rising from 46% to 59% this year.

Significantly more consumers in capital cities were interested or currently looking than those in regional areas, for both householders (55% vs. 45% respectively) and small businesses (62% vs. 44%). By jurisdiction, residents in South Australia were significantly less likely to be currently looking or interested in looking for a better deal (48%), while the same was true of small businesses in the ACT (at just 16%).

Not surprisingly, 82% of householders and 80% of small businesses who were dissatisfied with their energy company were currently looking or interested in switching compared with 49% and 51% of those who were satisfied. The fact that half of satisfied consumers were interested in switching highlights the fact that satisfaction is not an indicator of loyalty. Consistent with previous years, those who had switched in the past five years were also more likely to be currently looking or interested in switching (61% vs. 47% of those who had not switched), providing further evidence that when consumers do switch they tend to find it worthwhile.

Interest among residential consumers in *looking for a better deal* (%)



Base: All residential NEM participants, as specified in the chart above.

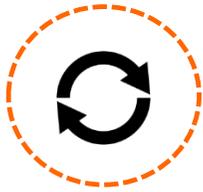
Q34. When it comes to your household's energy company, which one of the following statements is most applicable to your household?

MOTIVATION AND RATIONALE

Why do consumers do what they do?



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REASONS FOR SWITCHING (UNPROMPTED)

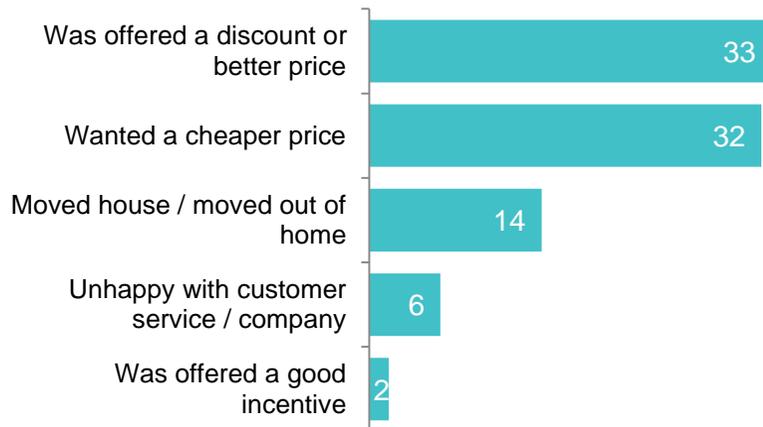
SWITCHED AT LEAST ONCE IN THE PAST 5 YEARS

Switching behaviour was largely price driven, with both residential and small business switchers of energy company or plan citing being “offered a discount or better price” and “wanted a cheaper price” as their top two reasons for switching. Although results are not comparable with previous years due to a change in the question (including previously being asked separately for electricity and gas), the response themes follow a similar order of priority this year.

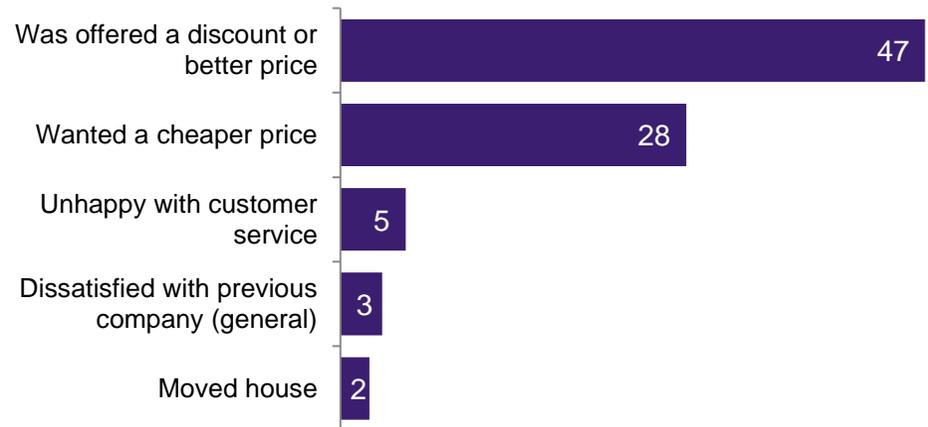
Results were broadly consistent across jurisdictions. Also consistent across residential and small business consumers, dissatisfaction with their retailer’s customer service were lower-level reasons for switching. Younger consumers and tenants were most likely to cite moving house as their reason for switching (25% of those aged 18-34 and 27% of tenants).

Top 5 reasons for switching (%)

Residential



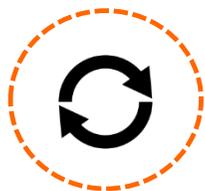
Business



Base: NEM participants who have switched energy company, plan or deal in the past 5 years (residential n=913, small business n=191).

Q22. The last time you switched energy company, plan or deal, what actually made you decide to switch? Unprompted, verbatim responses manually coded into themes.

NB: Results are not comparable to previous years due to change in question – previously asked separately for electricity and gas, and focused on main reason.



REASONS FOR NOT SWITCHING (UNPROMPTED)

NEITHER INVESTIGATED IN THE PAST 12 MONTHS NOR SWITCHED IN THE PAST 5 YEARS

Overall, 37% of residential consumers and 38% of small business consumers had neither investigated options nor made a switch.

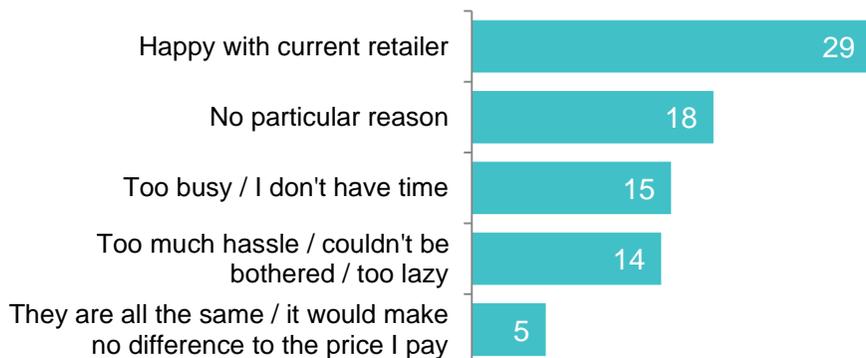
These consumers exhibited common indicators of being less engaged with the energy market. Among residents, they were more likely to report being: **on a standing retail offer** (47% vs. 22% of those on market offers for electricity, and 43% vs. 25% for gas); **less confident in their ability to find the right energy plan** (45% with confidence ratings of less than 7 out of 10 vs. 32% of those who rated their confidence highly at 7 or more); **not aware of any independent government comparison websites** (41% vs. 22% of those aware of such sites); and **without any new energy technologies installed** (41% vs. 31% of those who had at least one type). They were also more likely to exhibit some indication of **financial vulnerability** (41% vs. 32% of less vulnerable consumers).

Being happy with their current retailer was the top reason provided by consumers who had not exercised their choice in the retail market – i.e. they had neither investigated their energy options in the past 12 months nor switched their energy provider or plan in the past 5 years.

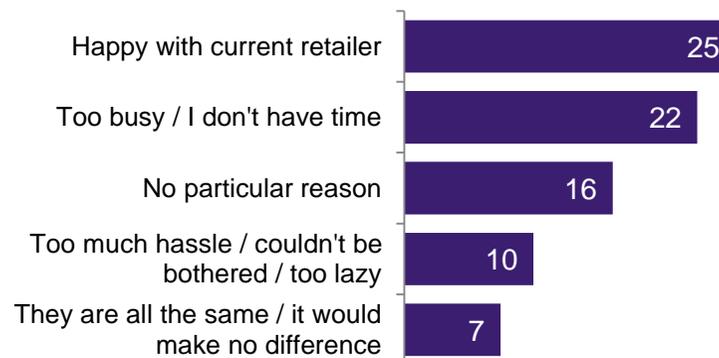
As charted below, this was true for both residential consumers (29%) and small business consumers (25%), with other key reasons including being: too busy (15% residential, 22% small business); the process being too much of a hassle (14% residential, 10% small business); and feeling that it would make no difference in the end (5% residential, 7% small business). Due to a change in question structure, these results are not directly comparable with previous years, though it is worth noting the key reasons appear to have remained consistent in both nature and relative scale.

Top 5 reasons for *neither switching nor investigating* (%)

Residential



Business



Base: NEM participants who have neither investigated in the last 12 months nor switched in past 5 years (residential n=719, small business n=191). Q32. Are there any reasons you haven't investigated different options or changed your energy company or plan in the last 12 months? Any other reasons? Unprompted, verbatim responses manually coded into themes. // NB: Results are not comparable to previous years due to change in question.



REASONS FOR NOT SWITCHING (UNPROMPTED)

INVESTIGATED IN THE PAST 12 MONTHS BUT NOT SWITCHED IN THE PAST 5 YEARS

Across the NEM, 9% of householders and 14% of small businesses investigated their energy options in the last year but hadn't switched in the last five years – with the proportion of small business consumers having grown steadily from 8% in 2015.

Finding that their current retailer had a better deal was the key reason cited by consumers who investigated their options but didn't go on to make a switch (17% of residential consumers and 29% of small business consumers). This has remained consistent over time.

The effort required and confusion were among other key reasons cited by both residential and small business consumers, with residential consumers also pointing to instances where their existing retailer matched or provided a better offer.

Among residential consumers, there was a sharp fall in the proportion saying they were 'just comparing prices', which was the top reason provided last year – from 22% to 2%.

Meanwhile, there was an increase in the proportion saying that changing energy deals was too much of a hassle (from 2% in 2016 to 14%), as well as the proportion saying they were happy with their current retailer (from 1% in 2015 to 13%).

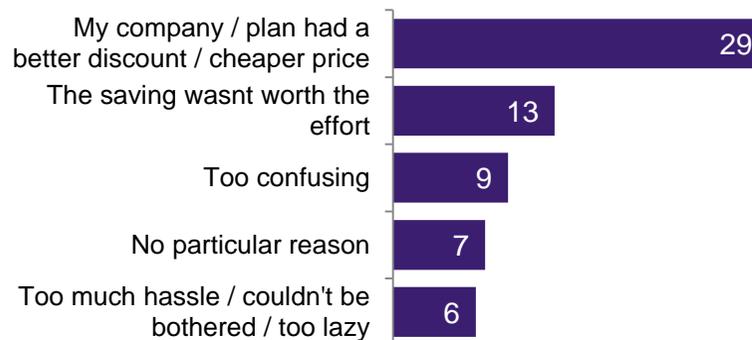
Over time, there has been an increase in the proportion of small business consumers who said changing energy company or plan was too confusing, from 1% in 2015 to 9% this year. By contrast, the proportion of residential consumers who said it was too confusing returned to 2015 levels, after a decrease last year (from 9% to 2%, rising to 8% in 2017).

Top 5 reasons for *investigating but not switching* (%)

Residential



Business



Base: NEM participants who have investigated options in the last 12 months but did not switch in the past 5 years (residential n=165, small business n=68). Q32. You mentioned investigating different offers and options. What made you decide not to go on and change your energy company or plan in the last 12 months? Unprompted, verbatim responses manually coded into themes.



MOST IMPORTANT FACTORS IN PAST SWITCHING

SWITCHED AT LEAST ONCE IN THE PAST 5 YEARS

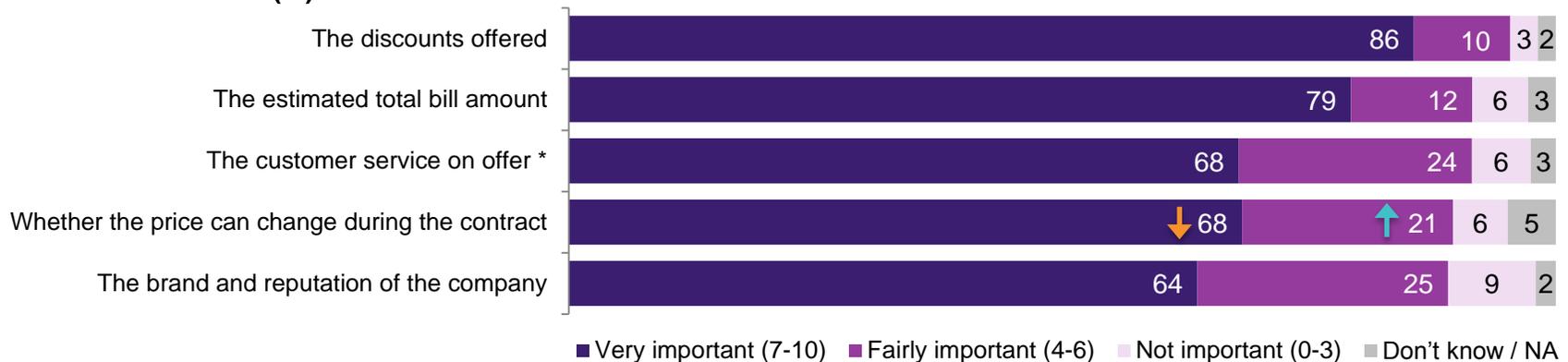
Reflecting the unprompted results, 'the discounts offered' has remained the most critical factor that influenced consumers' decisions to switch, with 86% of residential and 89% of small business consumers rating this as very important (7-10 out of 10). This was closely followed by the 'estimated total bill amount' (73% for residential and 84% for small business).

Motivations were broadly consistent across jurisdictions and over time. However, the importance of 'whether the price can change during the contract' decreased in importance this year (from 74% nett ratings of 7+ in 2016 to 68% in 2017 among residential consumers).

Notably, some factors were more important in motivating different groups of consumers to switch. These are detailed in the accompanying sub-group tables – examples follow:

- Factors that were significantly more important to younger consumers: the brand and reputation of the company (highly important at nett 7-10 to 72% of 18-34 year olds, vs. 61% of those aged 35+), the availability of green / renewable energy plans (57% vs. 35% respectively), the solar feed-in tariff (48% vs. 36%), the ability to purchase or access new technologies (51% vs. 34%), bonus rewards (51% vs. 23%) and the company having offered an upgraded meter (45% vs. 24%).
- Intuitively, homeowners were more likely than renters to place high importance on the solar feed-in tariff on offer (45% vs. 25%), and the ability to purchase or access new energy technologies (42% vs. 30%).
- For those with vulnerability indicators, the following were more important: the discounts offered (90% rated this 7+), the customer service on offer (75%) and whether the price could change during the contract (74%), with certainty especially important to these consumers.

Top 5 most important factors in decision to switch energy company, plan or deal – residential consumers (%)



Base: Residential NEM participants who have switched energy company, plan or deal in the past 5 years (n=913).

Q49. Please rate how important each of the following factors was in your decision to switch your energy company, plan or deal.



LEAST IMPORTANT FACTORS IN PAST SWITCHING

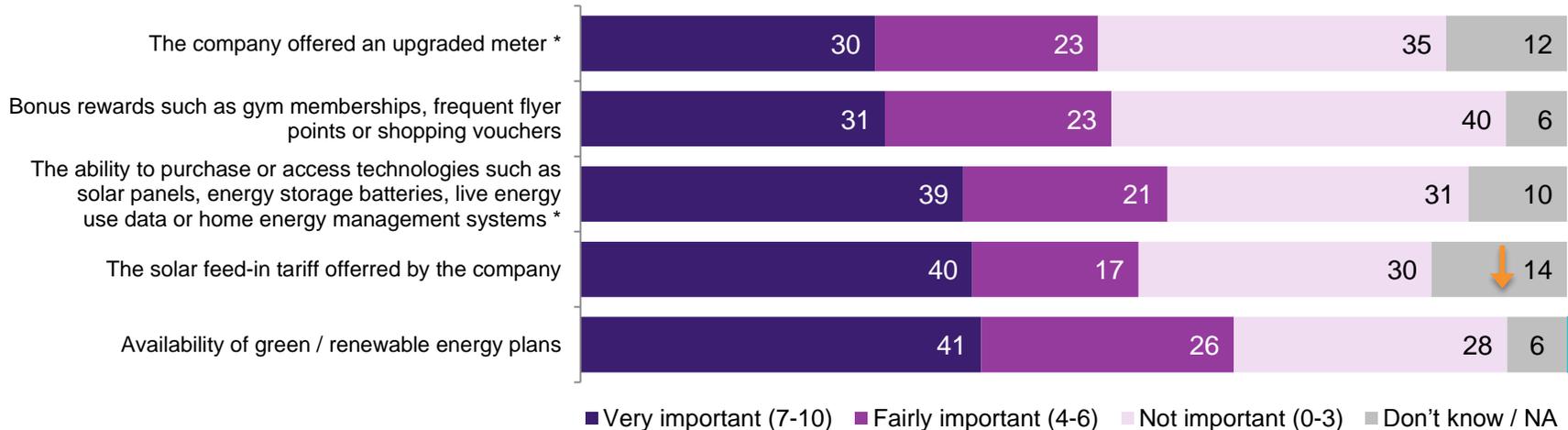
SWITCHED AT LEAST ONCE IN THE PAST 5 YEARS

For both residential and small business consumers, meter upgrades (a new measure in 2017) were the least effective incentive for people to switch their energy company or plan – only 30% and 33% respectively gave this an importance rating of 7 or more out of 10.

Bonus rewards also remained less important for residential consumers (31%), however these were much more appealing to small businesses that had switched, with 64% considering these to have been very important.

These lower-level motivators were stable in comparison to 2016.

Top 5 *least important* factors in decision to switch energy company, plan or deal – residential consumers (%)



Base: Residential NEM participants who have switched energy company, plan or deal in the past 5 years (n=913).

Q49. Please rate how important each of the following factors was in your decision to switch your energy company, plan or deal.



WHAT CONSUMERS THOUGHT WOULD MOTIVATE THEM TO SWITCH IN THE FUTURE

To better understand consumer values, in a new question for the study, all residential only survey participants were asked how important the same factors would be if they were to switch to another energy company, plan or deal in future (not just those who had switched in the past), using the scale where zero meant not at all and 10 meant extremely important.

The things consumers felt would motivate them to switch in the future were very similar to the historical factors that were most important to those who had switched in the past. This suggests that most consumers are assuming the same sorts of pressures and service designs that are in place today will be present in future.

As with factors for those who had switched in the past, there were quite a few significant differences in anticipated factors that would be important to different groups of consumers – for example more females than males rated most of the factors as highly important. These are detailed in the accompanying sub-group tables.

Stronger motivations

Residential consumers

Nett Important (7-10)

The discounts offered	86%
The estimated total bill amount	81%
Whether the price can change during the contract	77%
The brand and reputation of the company	75%
The customer service on offer	74%
Whether you are locked into a contract	71%

Lower level motivations

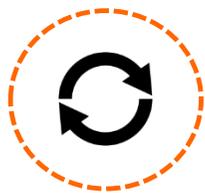
Residential consumers

Nett Important (7-10)

Availability of green / renewable energy plans	47%
The ability to purchase or access technologies such as solar panels, energy storage batteries, live energy use data or home energy	46%
The solar feed-in tariff offered by the company	44%
Bonus rewards such as gym memberships, frequent flyer points or shopping vouchers	44%
The company offered an upgraded meter	41%

Base: Online NEM residential participants only (n=1,471).

Q79. If you were to switch to another energy company, plan or deal in future, how important would the following be to you? 0 = not at all, 10 = extremely important.



ATTITUDES TO SWITCHING

Survey participants were asked about their attitudes to switching using a series of statements in an agree / disagree question. Attitudes remained largely stable against previous years and were very consistent between residential and small business consumers, as well as by jurisdiction. Key observations and a few differences are noted below and results are tabled over the page for residential consumers.

Participants were most likely to agree that “I would switch my energy company if I was not satisfied with my current company” (77% strongly or somewhat agree among both residential and small business consumers and) and “I’m concerned that if I switch energy company or plan there might be hidden fees and charges” (64% residential, 59% small business).

It appears consumers are finding it somewhat less complicated to compare energy options over time. Compared to previous years significantly fewer consumers agreed that “it is too complicated to compare the various options and offers available”: 54% nett agreement in 2015 down to 48% in 2017 among residential consumers, and from 52% to 46% among small businesses.

Mistrust also appears to be declining, with significantly lower levels of agreement that “I generally don’t trust energy companies that promise a better deal”; from 55% in 2015 to 47% in 2017. However, consumers have become more neutral rather than trusting: there has been a shift towards neither agreeing nor disagreeing on this statement (from 27% in 2015 to 35% this year), while disagreement has remained consistent (at 17% this year). Victorian residents were the least trusting of all jurisdictions, with the majority (55%) still agreeing with the statement.

In addition, results were more divided on some statements, where similar proportions agreed or disagreed. These included “I’m concerned that if I switch energy company I will lose the concession or special payment arrangements I currently receive” – a new statement in 2017 (residential: 38% agree, 31% disagree; small business: 32% agree, 31% disagree), “I don’t have the time or energy to think about switching”, and “The energy industry is keeping up with the changing needs of consumers” – another new statement (residential: 30% agree, 33% disagree; small business: 24% agree, 37% disagree).

Of note is that attitudes were different between consumers who were and who were not aware of any energy offer comparison websites. Those aware of comparison sites were more likely to disagree with all of the statements – significantly so for several, as shown in the table at the bottom of the next page.

In particular, consumers aware of comparison sites were more likely to disagree that they don’t have time to think about switching, that it is too complicated to compare offers, that they don’t trust energy companies offering a better deal, and that they are concerned about hidden fees and charges. These results highlight some of the benefits of comparison sites and provide sound evidence to support efforts to raise awareness of them.

Base: Residential NEM participants (n=1,797).

Q59. To what extent do you agree or disagree with the following statements?



ATTITUDES TO SWITCHING CONT.



Nett Agree



Nett Disagree

ATTITUDINAL STATEMENTS – Residential consumers

<i>I would switch my energy company if I was not satisfied with my current company</i>	77%	4%
<i>I'm concerned that if I switch energy company or plan there might be hidden fees and charges</i>	64%	14%
<i>It is too complicated to try and compare the various options and offers available</i>	48% ↓	24%
<i>I generally don't trust energy companies that promise a better deal</i>	47% ↓	17%
<i>I would prefer to try and save energy to reduce my bill than to seek out a better deal</i>	45%	23%
<i>The amount of money I could save is not worth the time and effort involved in switching</i>	39%	31%
<i>I'm concerned that if I switch energy company I will lose the concession or special payment arrangements I currently receive *</i>	38%	31%
<i>I don't have the time or energy to think about switching</i>	37%	34%
<i>The energy industry is keeping up with the changing needs of consumers *</i>	30%	33%

Nett DISAGREE BY AWARENESS OF COMPARATOR SITES – Residential Consumers

(Arrows show where there were significant differences between those aware and those not aware of these sites)

AWARE OF ANY COMPARATOR SITES?

	Yes	No
<i>I don't have the time or energy to think about switching</i>	43% ↑	31% ↓
<i>It is too complicated to try and compare the various options and offers available</i>	33% ↑	22% ↓
<i>I generally don't trust energy companies that promise a better deal</i>	24% ↑	15% ↓
<i>I'm concerned that if I switch energy company or plan there might be hidden fees and charges</i>	20% ↑	13% ↓



HOW MUCH DO CONSUMERS NEED TO SAVE BEFORE SERIOUSLY CONSIDERING SWITCHING?

RESIDENTIAL CONSUMERS

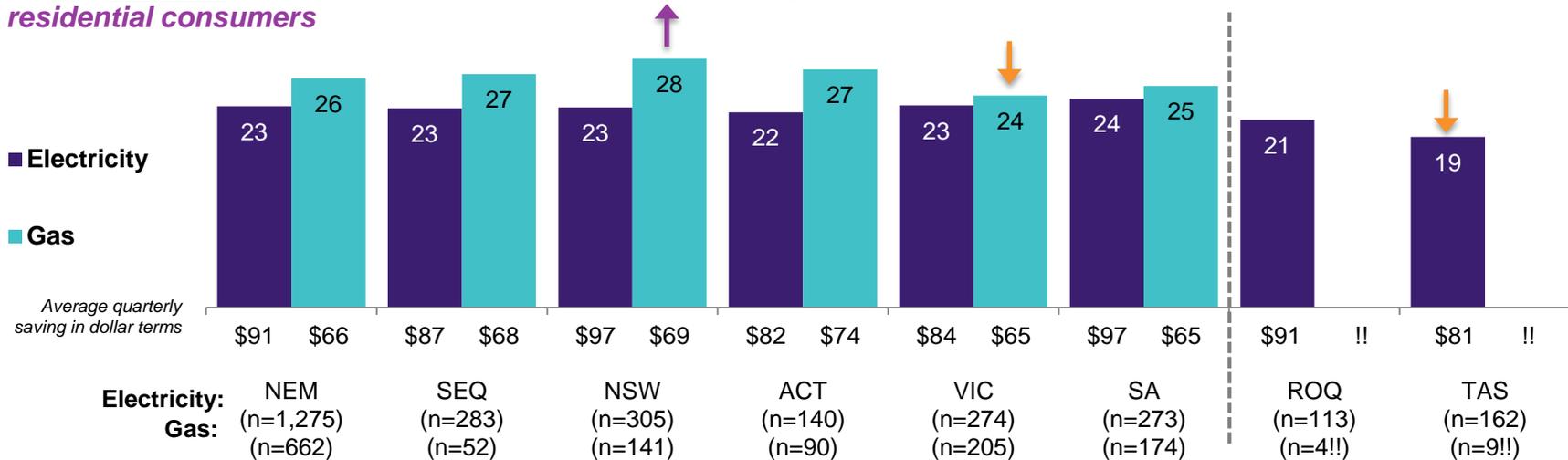
On average, residential participants said they would need to save around a quarter of their typical energy bill in order to consider switching – 23% for electricity consumers and 26% for gas consumers.

On average for the NEM, householders estimated their quarterly electricity bill to be \$367 – highest in Tasmania (\$426) and NSW (\$401) and lowest in Victoria (\$330) and the ACT (\$332). For residential gas bills, the quarterly NEM average was an estimated \$204. These results are not directly comparable with previous years, as the question structure has been altered to encourage greater precision in the reporting of bill amounts.

The quarterly savings required by residential consumers to seriously consider switching averaged \$91 for electricity and \$66 for gas. As a proportion of the average bill in each jurisdiction, electricity consumers in Tasmania tended to require a lesser proportional saving (19% vs. 23% NEM). Gas consumers in NSW tended to require a greater saving (28% vs. 26% NEM), while those in Victoria tended to require a lesser saving (24%).

Results were largely consistent across demographic and behavioural sub-groups, with those requiring a higher saving on their electricity bill more likely to be women (25% saving required vs. 21% for men) or with relatively small bills (26% saving required among those with bills of less than \$300 on a quarterly basis vs. 21% of those with bills of \$300 or more).

Average quarterly saving needed (%) to consider switching – residential consumers



Base: Residential electricity consumers (n=1,550) or those with mains gas (n=675). // D3a/D4a. How often do you receive your electricity/gas bill? // D3/D4. How much was your most recent electricity/gas bill? // Q60/Q61. Relative to that last electricity/gas bill, how much money would you need to save in order to seriously consider changing your company or plan? // NB: When discussing average dollar values, outliers have been identified via statistical analysis and omitted.



HOW MUCH DO CONSUMERS NEED TO SAVE BEFORE SERIOUSLY CONSIDERING SWITCHING?

BUSINESS CONSUMERS

Results were similar at the NEM level for small business consumers, with participants saying they would need to save 23% off their typical electricity bill and 30% off their typical gas bill in order to consider switching.

On average for the NEM, small business consumers reported a quarterly electricity bill of \$549. For small business gas bills, the quarterly NEM average was \$283. As before, these results are not directly comparable with previous years due to question changes designed to encourage greater precision in the reporting of bill amounts.

In dollar terms, the quarterly savings required for NEM small business consumers to seriously consider switching averaged \$133 for electricity and \$84 for gas.

As a proportion of the average bill in each jurisdiction, electricity consumers in NSW and the ACT tended to require a lower saving – at 20% and 12% respectively vs. 23% across the NEM.

Average quarterly saving needed (%) to consider switching

– small business consumers

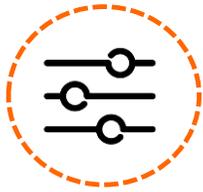


Base: Small business electricity consumers (n=483) or those with mains gas (n=138). D3a/D4a. How often do you receive your electricity/gas bill? // D3/D4. How much was your most recent electricity/gas bill? // Q60/Q61. Relative to that last electricity/gas bill, how much money would you need to save in order to seriously consider changing your company or plan? // NB: When discussing average dollar values, outliers have been identified via statistical analysis and omitted.

CONSUMER OUTCOMES

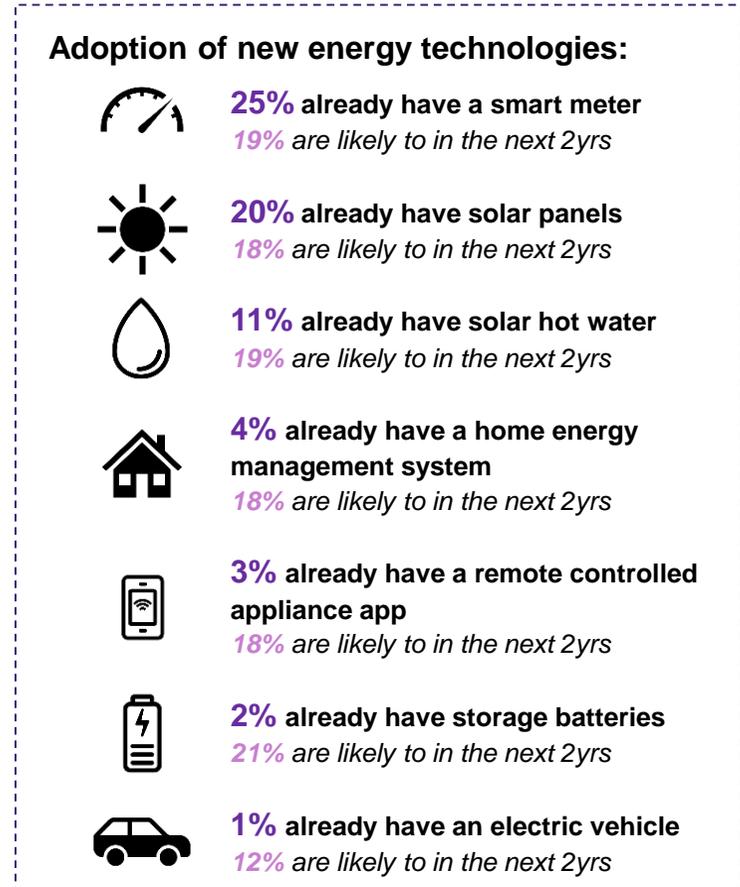
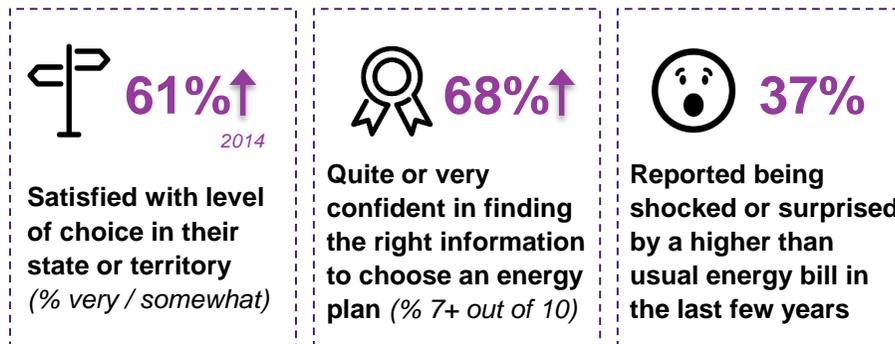
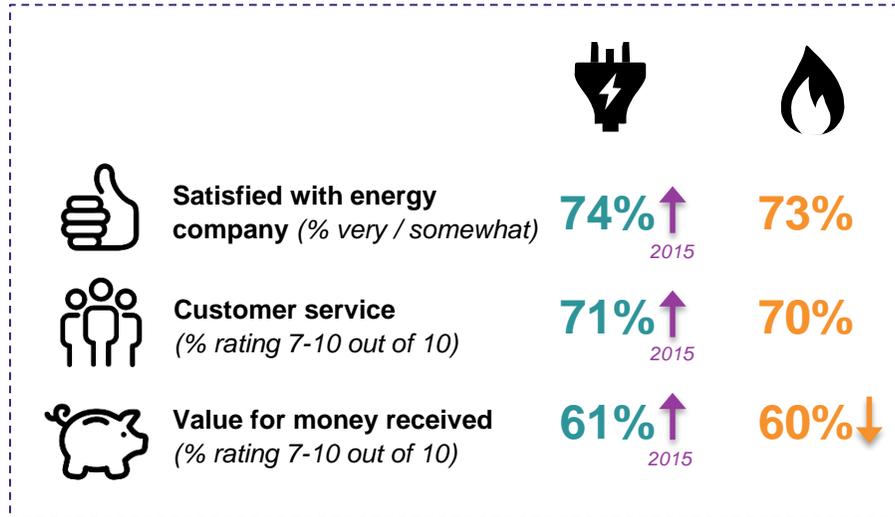


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CONSUMER OUTCOMES: SNAPSHOT OF RESULTS

RESIDENTIAL CONSUMERS



↑↓ Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences on this snapshot relate to changes between 2016 and 2017

CONSUMER CHOICE



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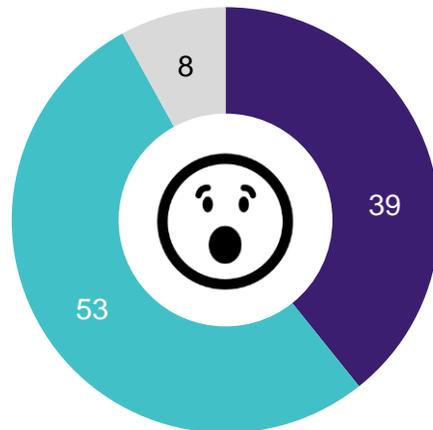
SURPRISE ENERGY BILLS AND 'BILL SHOCK'

*Around two in five consumers said they had received an energy bill in the last few years that had surprised or shocked them, with virtually all cases relating to a **higher** than expected bill (not a lower one): 37% of residential consumers and 39% of small business consumers. Results for this new question were consistent across states and territories.*

Among residential consumers, the average higher-than-expected bill amount was \$268 more than the usual bill per quarter, while for small business consumers, this was slightly higher at \$319 more per quarter. Results for those who said they had received a *lower* than expected bill are not shown here due to extremely low samples.

'Bill shock' was most likely to have been experienced by some of the most vulnerable consumers, including those who identified as being Indigenous (73% vs. 39% of other consumers), exhibiting some indication of financial stress (47% vs. 30% of other consumers) or renting their home (47% vs. 36% of homeowners). This was also true of those with children under 18 years of age at home (44% vs. 37% of those without children) and those in larger households (43% of those with three or more people vs. 35% of those in smaller households).

Key indicators of engagement with the energy market over the past 12 months were associated with experiences of 'bill shock', suggesting this may have driven some to investigate their options (47% who had investigated their options in the last year reported bill shock vs. 36% of those who had not) or to indeed make a switch in energy provider or plan (44% vs. 37% of those who had not made a switch).



■ Yes ■ No ■ Cannot recall

37% of residential consumers had received a **higher than expected bill, averaging an extra \$268 on a quarterly basis**

2% received a **lower than expected bill**

Base: Residential NEM participants (n=1,797). / Q80. Have you had any energy bills in the last few years where the amount really surprised or shocked you?

Base: Residential NEM participants who experienced bill shock (n=287). / Q81. The last time this happened, how different was it from your normal bills, in dollar terms?



ACTIVE CHOICE IN CURRENT ELECTRICITY OR GAS CONTRACT

In a new question for 2017, consumers who reported being on a current contract or plan were asked whether they had actively chosen to be on it or whether their energy company put them on it.

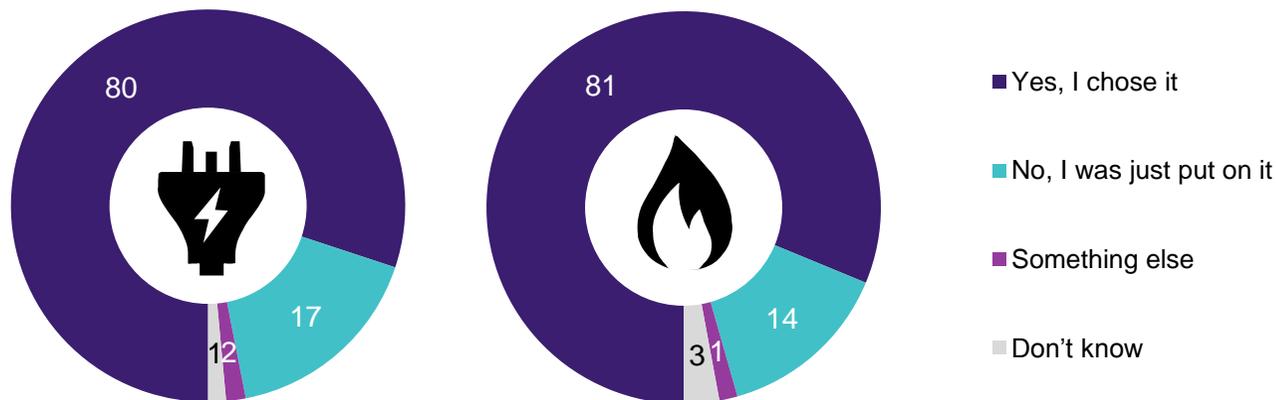
The results were consistent among residential and small business consumers for both their electricity and gas contracts/plans. Four in five said they had actively chosen their plan. Among householders: 80% for their electricity company, 81% gas company, and among small businesses: 79% for their electricity company, 78% gas company.

Meanwhile around one in six believed they were simply put onto the plan by their retailer (14-17%).

Residential consumers in the NEM were more likely to have actively chosen their electricity plan (rather than being placed on it) if they were more engaged with the energy market in general - e.g. aware of a government comparison website, had actively investigated options in the past year, or switched energy provider or plan in the past year.

In contrast, consumers exhibiting indicators of financial vulnerability were more likely to say they had been put onto their current electricity contract (20% vs. 13% without any of the indicators of vulnerability examined in this study).

Whether actively chose current energy contract or plan – residential consumers (%)



Base: Residential NEM participants on a contract or plan for their electricity (n=793) or mains gas (n=424).
Q66 / Q75. Did you actively choose to be on this particular contract or plan or did your electricity/gas company put you on it?

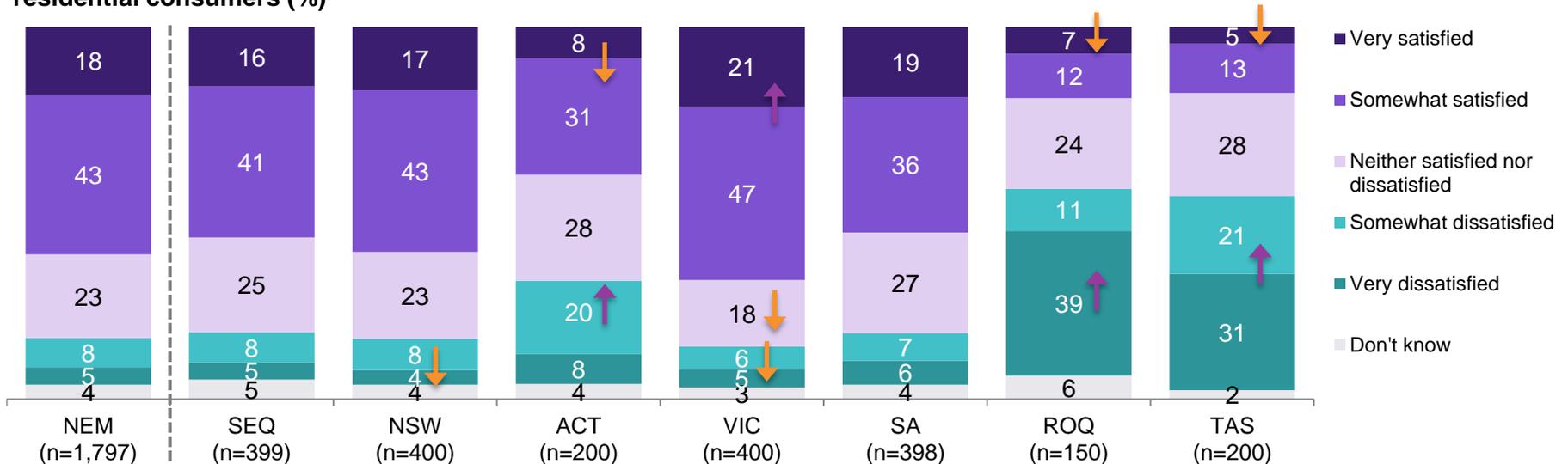


SATISFACTION WITH LEVEL OF CHOICE

Satisfaction with the level of choice available when it comes to energy companies and plans was highly variable by jurisdiction, with both Tasmania and regional Queensland having far lower satisfaction ratings than those in the active NEM jurisdictions.

At the National Energy Market level, net satisfaction is stable at 61% after experiencing a rise in 2016 (64%), which remains significantly higher than the 2014 benchmark of 51%. Across jurisdictions, satisfaction was far lower in those regions known for their limited energy options, with Tasmania at 18%, regional Queensland at 19% and the ACT at 40% (vs. the NEM average of 59%).

Satisfaction with the level of choice available – residential consumers (%)



Base: All residential participants (n=2,147).

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?



TOO MUCH, NOT ENOUGH OR THE RIGHT AMOUNT OF CHOICE?

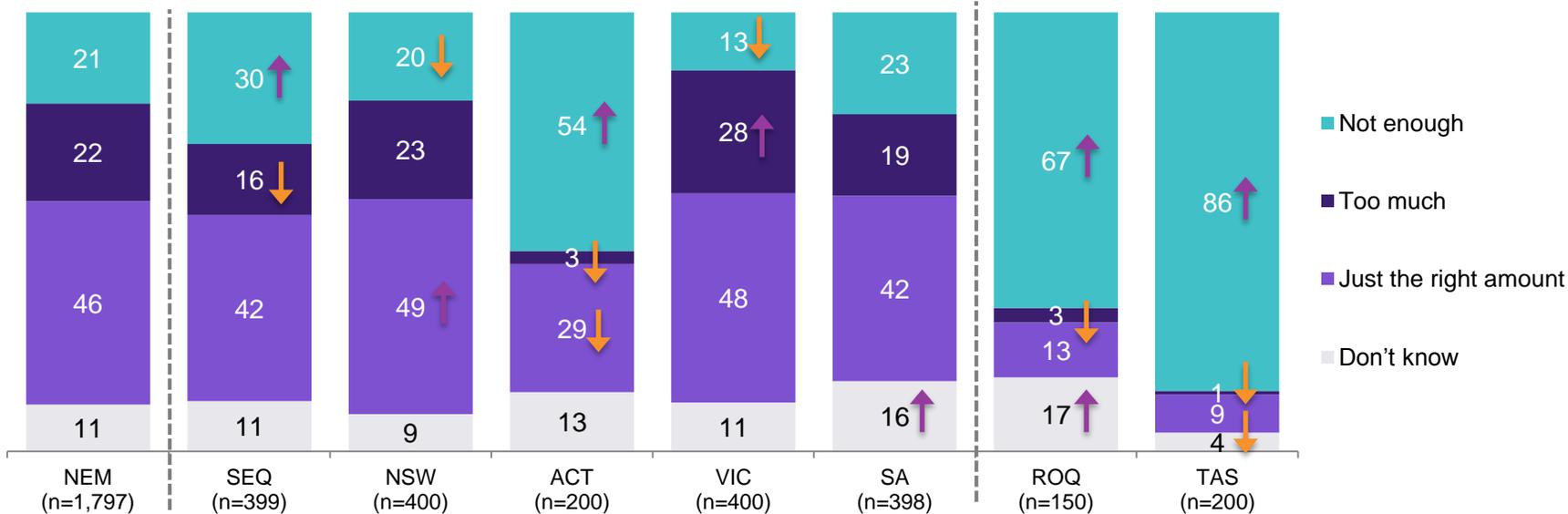
Unsurprisingly, national perceptions around the level of choice in energy companies and plans were highly related to consumer satisfaction with the level of choice in their jurisdiction. Those who felt there was not enough choice were residents of Tasmania (86%), regional Queensland (67%) and the ACT (54%), compared to the NEM average of 21%.

Those who were more likely to think they had enough choice were 18-34 years of age (50% vs. 42% of those aged 55+) and confident at being able to find the right information about their energy options (53% vs. 17%

who were not confident). In comparison, those who felt there was too much choice were more likely to be female (25% vs 19% of males), exhibiting indicators of financial vulnerability (25% vs. 19% of less vulnerable consumers), approached by an energy company in the last 12 months (27% vs. 20% not approached), and to have switched energy company or plan in the last year (28% vs. 20%).

NSW and Victorian consumers were the most satisfied with their choice options, with 49% and 48% feeling there was just the right amount, respectively.

Perceptions of choice in their state or territory – residential consumers (%)



Base: All residential participants (n=2,147). NEM result here excludes Rest of Queensland and Tasmania.

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?



CONFIDENCE IN FINDING THE RIGHT INFORMATION TO CHOOSE A SUITABLE ENERGY PLAN

Residential consumers continue to gain confidence in their ability to find the right information to choose an energy plan. This has been trending upwards significantly since 2015, from 54% rating their confidence highly at 7 or more out of 10, to 68% in 2017. In comparison, small business consumer confidence has stabilised since rising sharply in 2016 – at 68% in both 2016 and 2017, compared with 46% in 2015.

Residential consumers most likely to be highly confident (giving a 7+ rating):

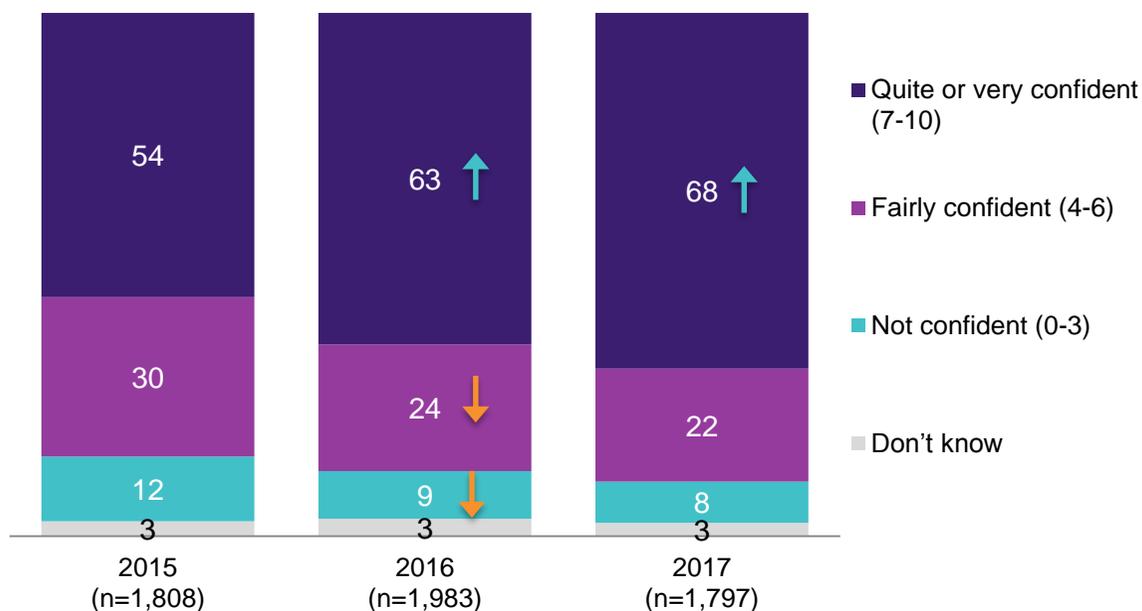
- Aware of any comparator sites (80% vs. 64% not aware of any);
- Had investigated their options in the past 12 months (77% vs. 63% who had not);
- Had switched company or plan in the past five years (73% vs. 62% who had not);
- Satisfied with their energy company or plan (76% vs. 50% of those dissatisfied).

These findings were similar for small businesses.

Results here provide sound evidence that consumer confidence in finding the information they need is indeed an outcome of energy market engagement.

Residents in the ACT were the least likely of all jurisdictions to be highly confident, with just 42% giving a rating of 7+. Note that those in the ACT were also among the least likely to be aware of government comparison websites, to have investigated their options, or to be satisfied with their level of choice.

Confidence in finding the right information – residential consumers (%)



Base: All Residential NEM participants, as specified in the chart above.

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.

PERCEPTIONS AND SATISFACTION

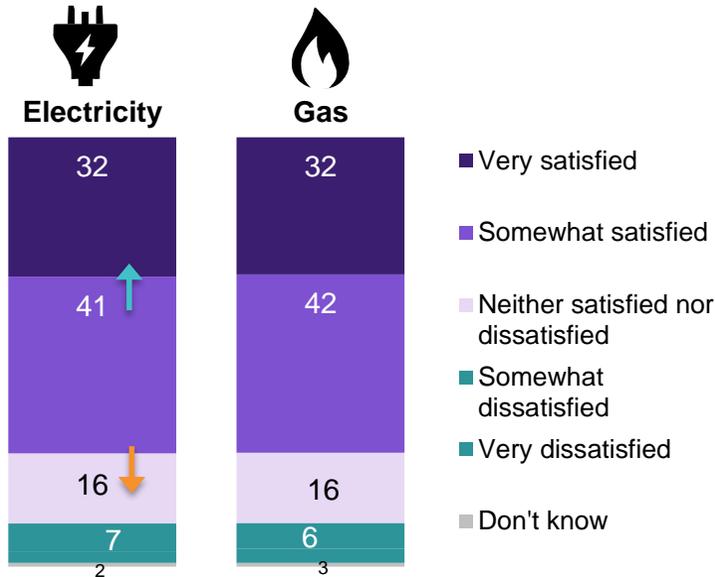


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SATISFACTION WITH ENERGY COMPANIES

Satisfaction with energy retailers – residential consumers (%)



A note on satisfaction, customer service and value ratings: Survey participants were asked about their level of satisfaction with their ‘energy company’ if they had the same company for both electricity and gas, or their ‘electricity company’ if they didn’t have gas or if it was with a different company. These results are shown in the first column in the chart above. If participants had gas and it was with a different retailer they were asked a separate question asking about their satisfaction with their gas company. These results were combined with the ‘energy company’ results to create a total ‘gas’ measure that was comparable with historical data. The same applies to the customer service and value for money ratings on the next page.

The majority of residential NEM consumers were satisfied with their current electricity company (nett 74%) or gas company (nett 73%), with nearly a third very satisfied (32% for both electricity and gas).

Small business consumers were less satisfied – nett 67% for electricity and nett 68% for gas, with only 26% saying they were very satisfied with their electricity company and 28% with their gas company.

Indeed, satisfaction among residential electricity consumers increased for the second consecutive year, up from nett 66% in 2014 to nett 74% this year. However, there has been no material change over the long run in satisfaction among residential gas consumers and small business consumers (for either electricity or gas for the latter consumer segment).

The following types of residential consumers were significantly more likely to indicate they were satisfied with their energy company: those who prefer to speak a language other than English at home (82% vs. 73% of others), those aware of at least one government comparator website (80% vs. 72%) and those in an embedded network (90% vs. 73%).

Meanwhile, dissatisfaction was higher among residential consumers who had actively investigated their energy options in the past 12 months (electricity: 14% vs. 7% of those who hadn’t investigated, and for gas: 16% vs. 6%). The same was true of small business electricity consumers, with 16% of those who had investigated saying they were dissatisfied vs. only 6% of those who hadn’t done so. This is in keeping with some of the top reasons for investigating, as outlined earlier in this report.

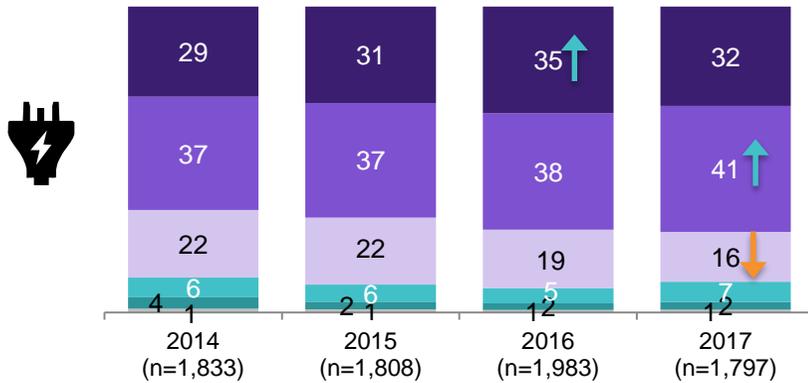
Of note is that the satisfaction results were very consistent by retailer.

Base: Residential NEM participants (n=1,797). / Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?
 Base: Residential NEM gas participants (n=979). / Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?

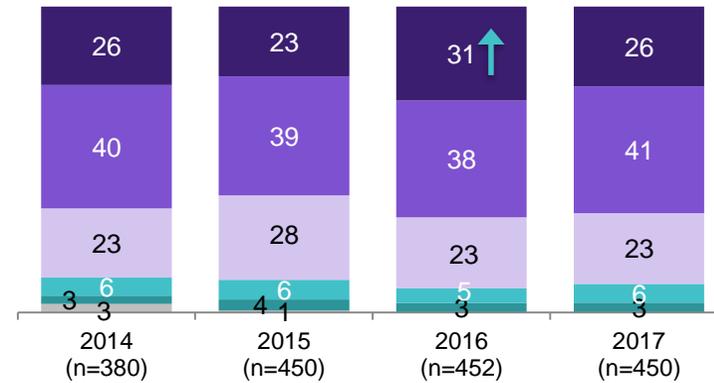


SATISFACTION WITH ENERGY COMPANIES

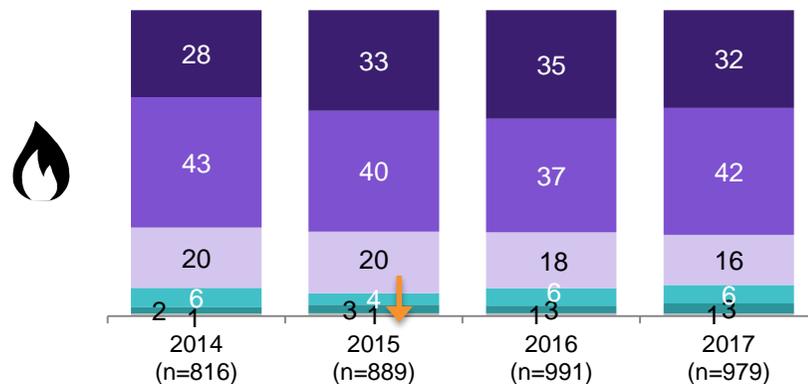
Electricity retailers – residential consumers (%)



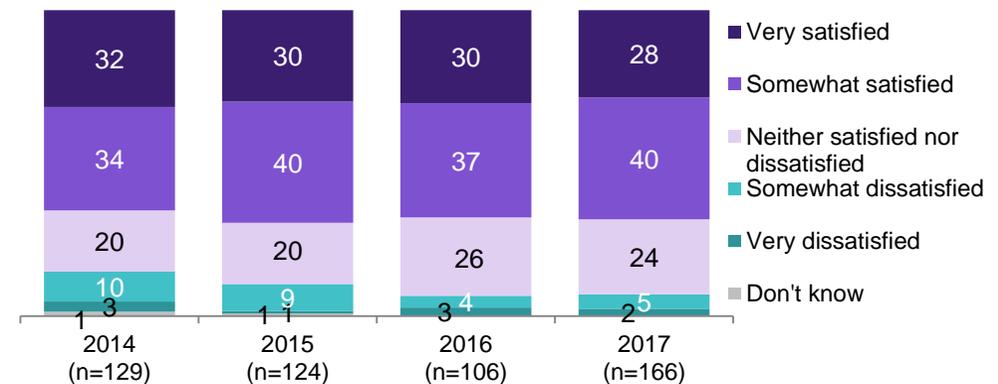
Electricity retailers – small business consumers (%)



Gas retailers – residential consumers (%)



Gas retailers – small business consumers (%)



- Very satisfied
- Somewhat satisfied
- Neither satisfied nor dissatisfied
- Somewhat dissatisfied
- Very dissatisfied
- Don't know

Base: Residential NEM participants (n=1,797). / Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?
 Base: Residential NEM gas participants (n=979). / Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



CUSTOMER SERVICE AND VALUE FOR MONEY

RESIDENTIAL CONSUMERS

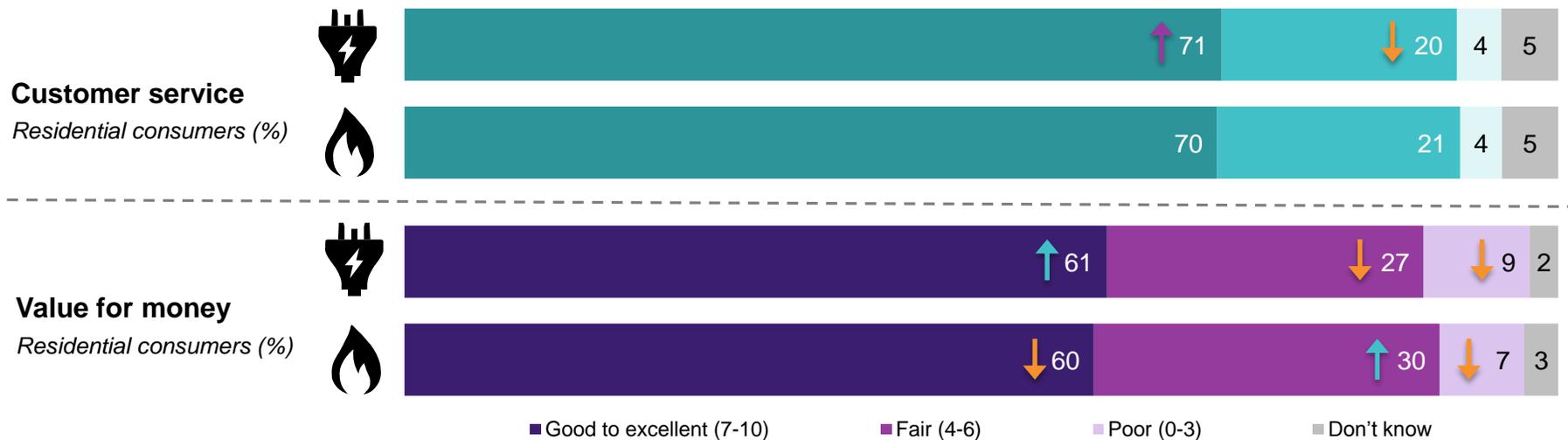
Customer service ratings for energy companies remained high: 71% of residential consumers gave a high rating of 7 or more out of 10 to their electricity company (up significantly from 65% in 2015) and 70% for their gas company (consistent with previous years). Results were very consistent by jurisdiction.

While small business consumers rated customer service slightly lower than residential consumers, the trend over time was similar – 63% gave a rating of 7 or more for their electricity retailer (up significantly from 48% in 2015) while 65% gave a rating of 7 or more for their gas retailer (consistent with previous years).

Value for money continued to be rated comparatively lower than customer service, though the majority gave a high rating of 7 or more out of 10: 61% for electricity companies and 60% for gas companies.

However, while electricity company ratings have risen significantly over time (from 50% in 2014), gas results have declined significantly (down from 66% in 2016).

Small business results were again lower than for residents. Ratings of 7 or more among electricity consumers has fluctuated over the past few years, though it is back on par with benchmark results – from 52% in 2014 to 48% in 2017; 54% of gas consumers provided similar ratings, consistent with previous years. Of note is that the proportion of poor ratings (0 to 3) has increased significantly since the benchmark year – from 7% in 2014 to 14% in 2017 among electricity consumers, and 3% in 2014 to 12% in 2017 among gas consumers.



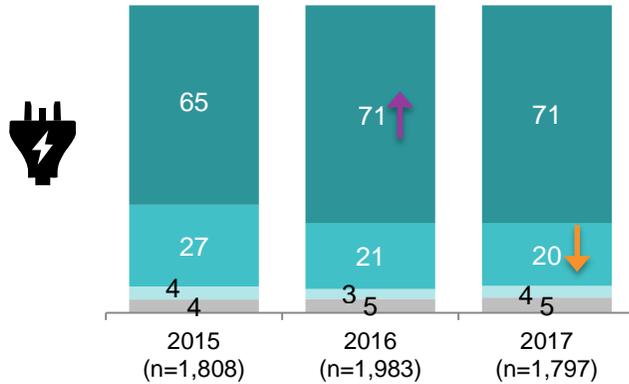
Base: NEM Electricity (n=1,797) / Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? // Has mains gas (n=979) / Q3 & Q8. How would you rate the overall quality of customer service provided by your gas company? // Not comparable to 2014 results due to change in question structure.

Base: NEM Electricity (n=1,797) / Q4. How would you rate the overall value for money of the products and services provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? // Has mains gas (n=979) / Q4 & Q9. How would you rate the overall value for money of the products and services provided by your gas company?

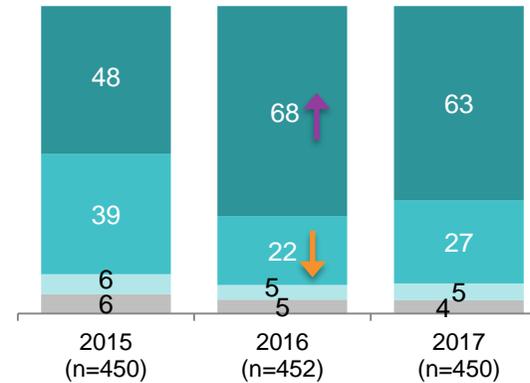


CUSTOMER SERVICE RATINGS OVER TIME

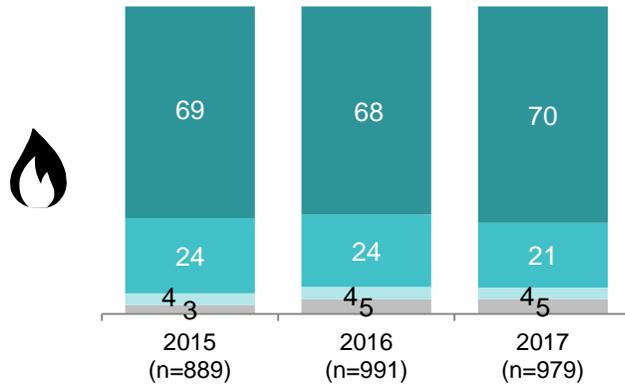
Electricity retailers – residential consumers (%)



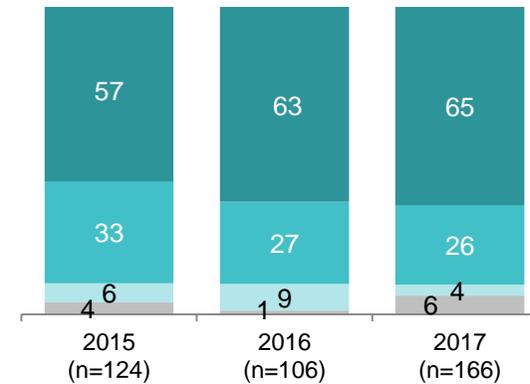
Electricity retailers – small business consumers (%)



Gas retailers – residential consumers (%)



Gas retailers – small business consumers (%)



- Good to excellent (7-10)
- Fair (4-6)
- Poor (0-3)
- Don't know

Base: NEM electricity consumers (as per charts) / Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? // NEM gas consumers (as per charts) / Q3 & Q8. How would you rate the overall quality of customer service provided by your gas company?

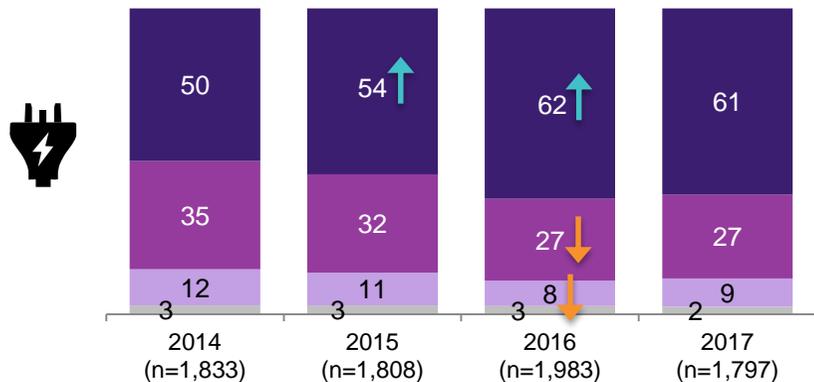
10 = excellent, 0 = very poor.

↑ ↓ Arrows denote significant differences compared to previous periods at the 95% confidence level

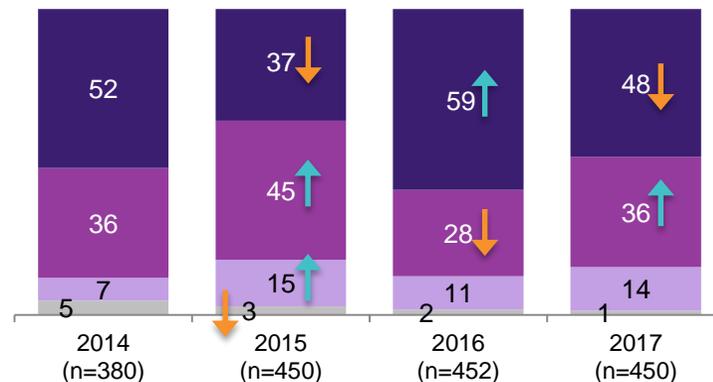


VALUE FOR MONEY RATINGS OVER TIME

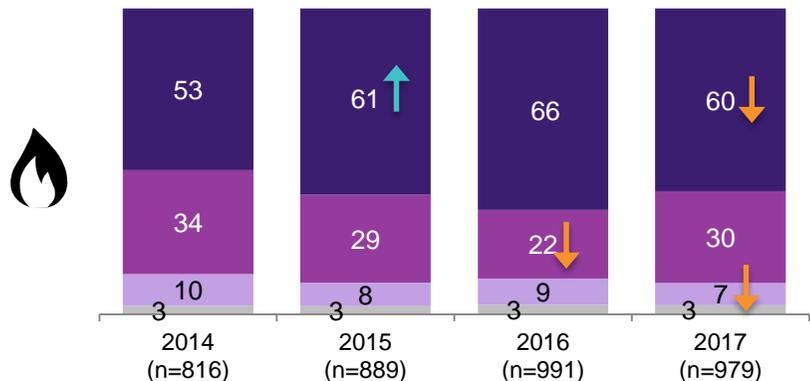
Electricity retailers – residential consumers (%)



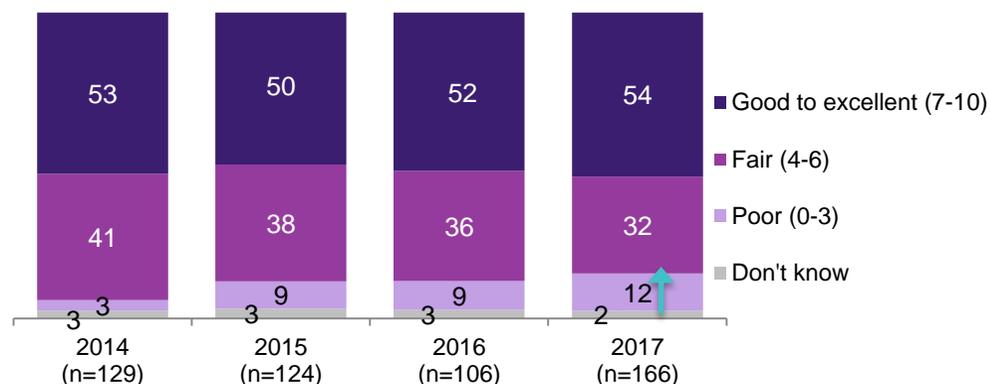
Electricity retailers – small business consumers (%)



Gas retailers – residential consumers (%)



Gas retailers – small business consumers (%)



Base: NEM electricity consumers (as per charts) / Q4. How would you rate the overall value for money of the products and services provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? // NEM gas consumers (as per charts) / Q4 & Q9. How would you rate the overall value for money of the products and services provided by your gas company?

10 = excellent, 0 = very poor.

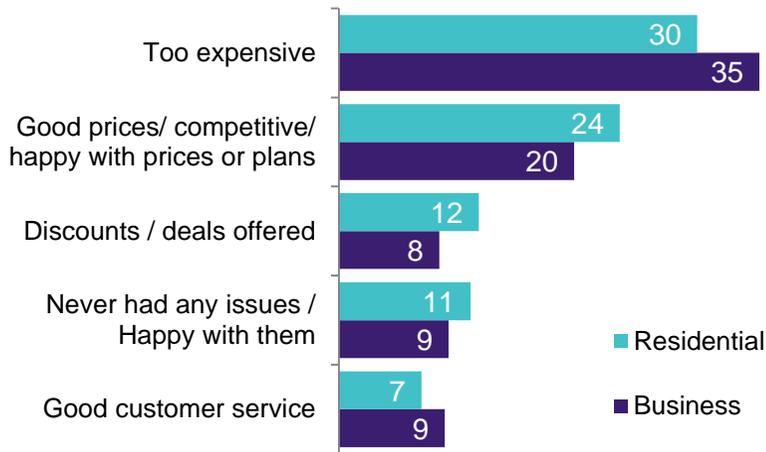
Arrows denote significant differences compared to previous periods at the 95% confidence level



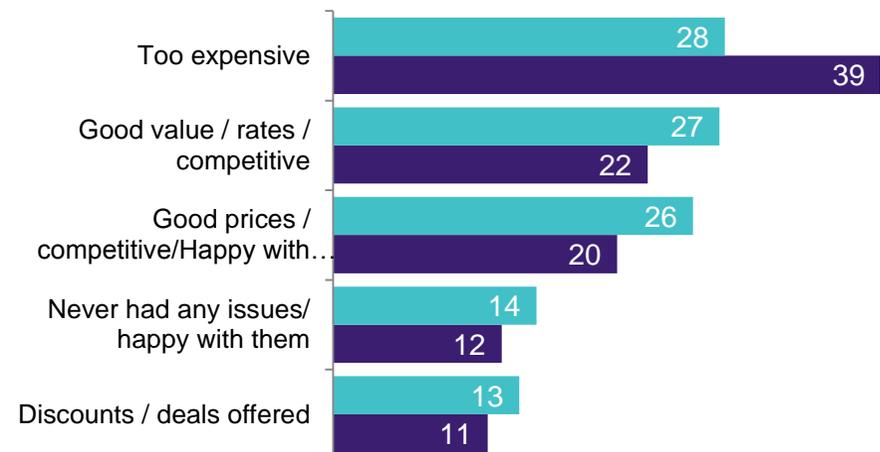
REASONS FOR VALUE FOR MONEY RATINGS (UNPROMPTED)

To gain a deeper understanding of value perceptions, participants were asked what made them rate their company as they did on value for money. Their reasons centred primarily around perceptions of expensive services and receiving good prices, discounts or deals, or good customer service. Around 1 in 10 residential and small business electricity consumers stated they had ‘never had any issues / were happy’ with their provider, with a slightly higher proportion feeling this way about their gas company.

Top 5 reasons for rating value for money – residential electricity consumers (%)



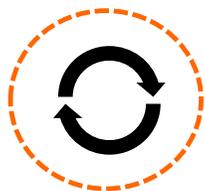
Top 5 reasons for rating value for money – residential gas consumers (%)



 NB: For small business consumers, ‘prices keep increasing’ was in the top 5 reasons, at 9%, above ‘discounts/deal offered’.

 For small business consumers, ‘good customer service’ was in the top 5 at 13%, above ‘never had any issues’.

Base: NEM electricity participants (residential n=1,797, small business n=415). / Q4b. To help us understand your expectations of value for money, please tell us about what made you give that rating? / Base: NEM gas participants (residential n=979, small business n=166). / Q9b. To help us understand your expectations of value for money, please tell us about what made you give that rating? NB: New question in 2017. NB: Participants’ responses were recorded verbatim and these were subsequently coded into key themes to measure the response incidence.



SATISFACTION WITH SWITCHING OUTCOMES

Most residential consumers who had switched energy company or plan in the last 5 years remained happy with both their decision to switch (82% vs. 80% in 2016) and the process involved (81% vs. 78%).

Results were similar for small business consumers: 74% were happy with their decision, ranging from 68% in South Australia to 100% in the ACT, and 76% were satisfied with the process. However, small businesses weren't quite as happy as seen in the peak year of 2016, when 50% agreed strongly that they were happy with their decision, compared with 33% this year, or that they were satisfied with the process, falling from 48% to 30%.

Satisfaction with switching outcomes was broadly consistent across the NEM, with at least 75% of householders in all jurisdictions declaring they were happy with their switching decision and satisfied with the process involved.

Those who were happy with their switching decision were more likely to be:

- Highly confident in their ability to find the right information for switching options (88% vs. 57% of those who were not confident);
- Home owners (84% vs. 74% of renters); or
- Unemployed (92% vs 80% employed).

Those who were more likely to be satisfied with the switching process included consumers with five or more people in their household: 91% vs 81% with just one or two occupants.

Satisfaction with *switching outcomes* – residential consumers

The last time I switched I was happy with the decision

I was satisfied with the process involved in switching



Nett Agree

82%

81%



Nett Disagree

7%

8%

Base: NEM residential participants who have switched energy company or plan in the past 5 years (n=913). Not asked in Tasmania or rest of Queensland. Q50. And having switched your energy company, plan or deal, to what extent do you agree or disagree with the following?

NEW ENERGY TECHNOLOGIES



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ADOPTION RATES OF NEW TECHNOLOGIES

Four in ten residential NEM consumers (41%) had at least one of the new technologies with uptake being highest for smart meters (25% reported having one) and solar panels (20%). A similar proportion of consumers intended to acquire at least one of these new technologies in the next two years (40%) and intention was highest for storage batteries (21%), lowest for electric vehicles (12%), and at relatively consistent levels for all of the other technologies asked about (18-19%).

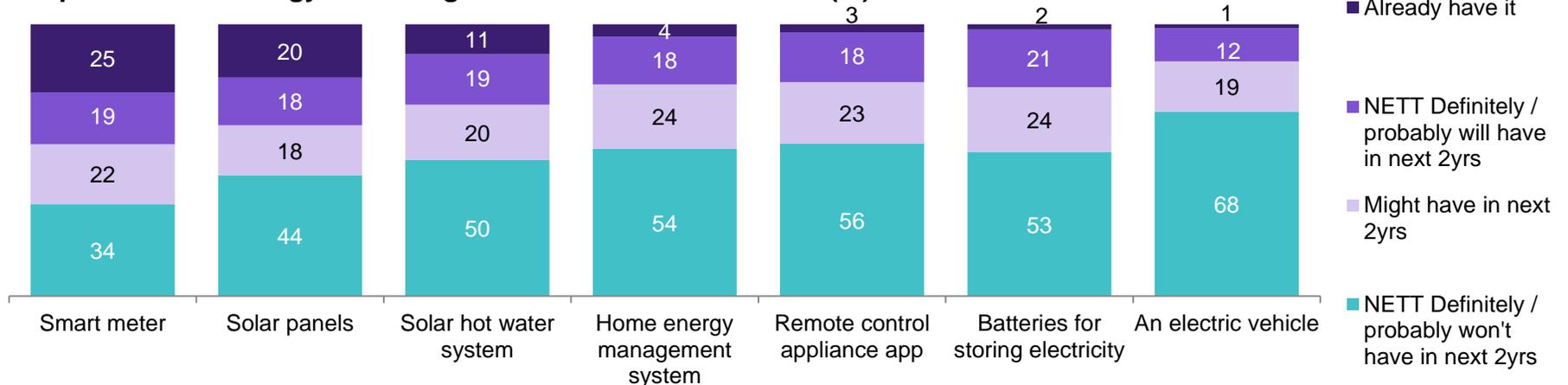
Due to a change to the wording of the question, results are not directly comparable with last year's study, though there are indications that willingness to acquire storage batteries in particular has increased, from 16% net likely in 2016.

The results are tabled over the next two pages by jurisdiction – for residential and then small business consumers, with very similar results. Notable findings are that home solar PV installations are highest in the Rest of Queensland (38%), followed closely by South Australia (36%), 8% of ACT residents and 6% of Victorians reported having a home energy management system, while only 58% of Victorians cited having a smart meter (when virtually all do), vs. 17% and below elsewhere.

Overall, current adoption and stated willingness to adopt were higher among those more engaged with the market (e.g. switched provider or plan in the past five years, more confident in their own ability to find the right information).

Other common indicators of willingness to adopt new technology included being male, from a non-English-speaking background and a homeowner. Solar panels were more likely to have already been installed by those aged 55+ years and those living outside of capital cities (28% vs. 16% among capital city dwellers), with the same being true for solar hot water (16% vs. 9% respectively). Meanwhile those aged under 55 were more likely to adopt most of the other technologies. Those under 35 years in particular were more likely to already own an electric vehicle (3% vs. 1% of older consumers), and capital city dwellers (2% vs. 0% of those living in regional areas).

Adoption of new energy technologies – residential consumers (%)



Base: NEM participants (n=1,797 residential) / QD5e. For each of the following things, please indicate whether your home has them, and if not, how likely you think it is that you will have them within the next two years.



ADOPTION RATES OF NEW TECHNOLOGIES CONT.

RESIDENTIAL CONSUMERS

Ownership arrangement	NEM (n=1,797)	SEQ (n=399)	NSW (n=400)	ACT (n=200)	VIC (n=400)	SA (n=398)	ROQ (n=150)	TAS (n=200)
Nett HAVE ANY	41%	39%	24%	29%	62%	43%	43%	20%
Nett INTEND TO*	40%	35%	44%	34%	39%	36%	35%	27%
Smart meter								
Already have	25%	12%	8%	7%	58%	17%	10%	7%
Nett likely next 2 yrs	19%	17%	26%	18%	14%	13%	11%	11%
Nett unlikely next 2 yrs	34%	41%	41%	44%	15%	47%	47%	57%
Solar panels								
Already have	20%	28%	14%	17%	17%	36%	38%	14%
Nett likely next 2 yrs	18%	14%	19%	16%	18%	16%	16%	14%
Nett unlikely next 2 yrs	44%	40%	48%	47%	46%	34%	34%	47%
Solar hot water system								
Already have	11%	16%	10%	13%	9%	10%	18%	5%
Nett likely next 2 yrs	19%	14%	22%	13%	19%	15%	15%	14%
Nett unlikely next 2 yrs	50%	48%	48%	56%	52%	52%	50%	53%
Home energy management system								
Already have	4%	3%	4%	8%	6%	3%	0%	2%
Nett likely next 2 yrs	18%	13%	23%	12%	16%	12%	11%	9%
Nett unlikely next 2 yrs	54%	60%	49%	57%	54%	62%	66%	66%
Remote control appliance app								
Already have	3%	2%	3%	1%	3%	3%	1%	0%
Nett likely next 2 yrs	18%	13%	22%	12%	18%	13%	12%	10%
Nett unlikely next 2 yrs	56%	58%	50%	62%	60%	64%	66%	72%
Batteries for storing electricity								
Already have	2%	1%	3%	2%	1%	2%	2%	0%
Nett likely next 2 yrs	21%	19%	24%	17%	20%	21%	17%	16%
Nett unlikely next 2 yrs	53%	54%	53%	55%	53%	52%	52%	62%
Electric vehicle								
Already have	1%	1%	2%	2%	1%	2%	0%	0%
Nett likely next 2 yrs	12%	8%	16%	10%	11%	7%	1%	6%
Nett unlikely next 2 yrs	68%	75%	59%	70%	72%	76%	87%	78%

Base: NEM residential participants (n=1,797) / QD5e. For each of the following things, please indicate whether your home has them, and if not, how likely you think it is that you will have them within the next two years.

* Nett INTEND TO refers to the total who probably or definitely intend to get these technologies in the next two years.

NB: Figures in blue/red denote significantly higher/lower differences when compared to all other jurisdictions combined.



ADOPTION RATES OF NEW TECHNOLOGIES CONT.

SMALL BUSINESS CONSUMERS

Ownership arrangement	NEM (n=450)	SEQ (n=100)	NSW (n=101)	ACT (n=49)	VIC (n=100)	SA (n=100)	ROQ (n=50)	TAS (n=50)
Nett HAVE ANY	44%	33%	28%	8%	73%	41%	40%	6%
Nett INTEND TO*	46%	49%	43%	47%	45%	50%	44%	35%
Smart meter								
Already have	28%	11%	12%	8%	64%	13%	12%	6%
Nett likely next 2 yrs	16%	19%	19%	29%	9%	16%	24%	17%
Nett unlikely next 2 yrs	32%	42%	40%	33%	11%	42%	48%	44%
Solar panels								
Already have	21%	21%	20%	2%	21%	32%	30%	4%
Nett likely next 2 yrs	19%	20%	18%	16%	18%	21%	24%	13%
Nett unlikely next 2 yrs	39%	37%	46%	31%	37%	26%	24%	58%
Solar hot water system								
Already have	10%	11%	7%	2%	14%	10%	28%	0%
Nett likely next 2 yrs	19%	18%	21%	12%	15%	25%	12%	10%
Nett unlikely next 2 yrs	50%	52%	53%	35%	49%	43%	38%	52%
Home energy management system								
Already have	4%	3%	4%	0%	5%	4%	8%	0%
Nett likely next 2 yrs	16%	15%	18%	12%	15%	15%	20%	13%
Nett unlikely next 2 yrs	53%	53%	51%	33%	57%	57%	50%	61%
Remote control appliance app								
Already have	3%	3%	1%	0%	4%	5%	0%	0%
Nett likely next 2 yrs	16%	16%	20%	10%	12%	12%	22%	13%
Nett unlikely next 2 yrs	58%	53%	57%	37%	63%	58%	56%	61%
Batteries for storing electricity								
Already have	1%	1%	1%	0%	2%	2%	6%	0%
Nett likely next 2 yrs	24%	22%	22%	16%	27%	29%	34%	18%
Nett unlikely next 2 yrs	49%	49%	51%	53%	49%	37%	36%	62%
Electric vehicle								
Already have	1%	1%	2%	2%	1%	1%	2%	0%
Nett likely next 2 yrs	10%	13%	11%	16%	8%	7%	10%	10%
Nett unlikely next 2 yrs	67%	64%	64%	73%	71%	74%	70%	80%

Base: NEM small business participants (n=450) / QD5e. For each of the following things, please indicate whether your business has them, and if not, how likely you think it is that you will have them within the next two years.

* Nett INTEND TO refers to the total who probably or definitely intend to get these technologies in the next two years.

NB: Figures in blue/red denote significantly higher/lower differences when compared to all other jurisdictions combined.



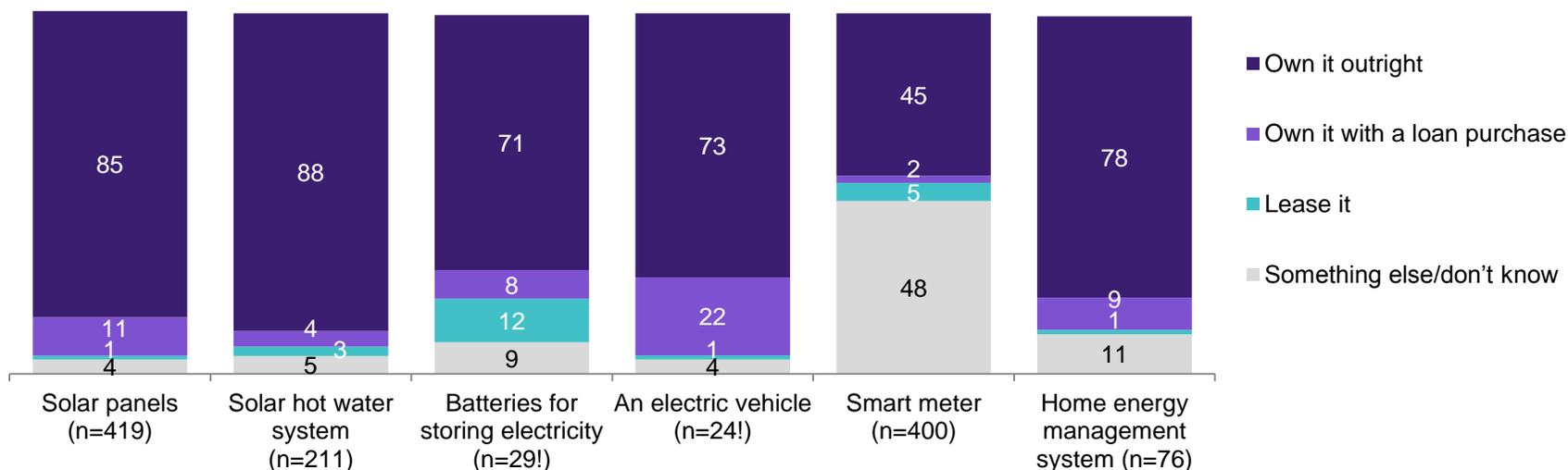
NEW TECHNOLOGY OWNERSHIP ARRANGEMENTS

The majority of new energy technologies were owned outright, ranging from 45% for smart meters to 88% for solar hot water.

Notably, there were high levels of uncertainty regarding the ownership of smart meters, with 45% of residential NEM consumers believing they own it outright while 48% were unsure. This is of particular interest in Victoria, where the electricity network companies own the meters yet 38% of residents thought they owned them.

Among residential consumers with solar panels, those who owned their solar system outright were more likely to be older (92% of those aged 55 years or above vs. 85% for all NEM consumers), retired (96%) or own their home outright (93%).

Ownership arrangements for emerging technologies – residential consumers (%)



Base: NEM participants who own each type of technology (n=24! - 419 residential, n=6!! - 104 small business) / D5f. What is your ownership arrangement for your...?
 ! Caution low base size: results indicative only.

EMBEDDED NETWORKS



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AWARENESS AND PREVALENCE OF EMBEDDED NETWORKS

In 2017, the survey included questions about embedded networks for the first time, which were asked of residential consumers who were not living in a freestanding home and all small business consumers (i.e. potentially in an embedded network).

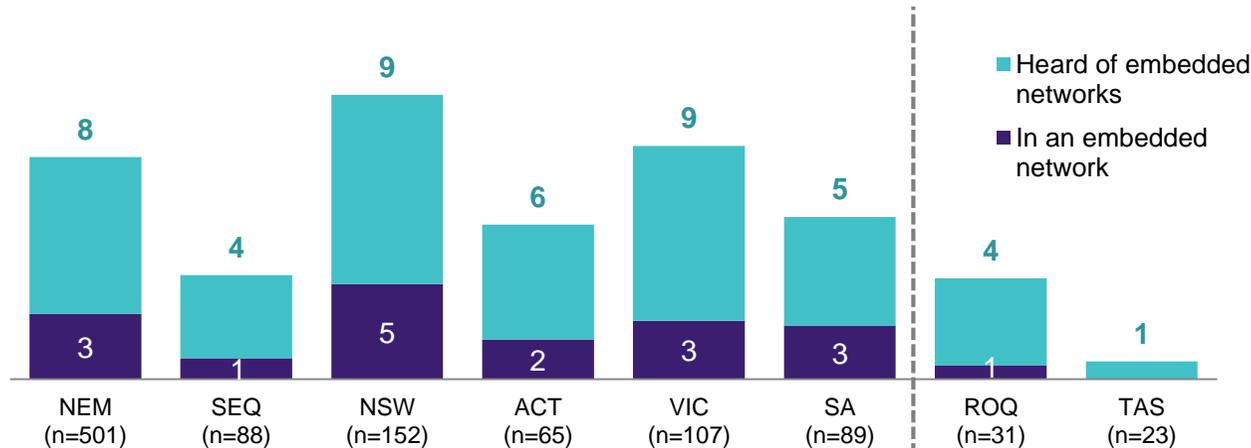
Only 8% of residential consumers were familiar with the concept of an embedded network, and 3% identified as being in such a network.

Among all small business consumers surveyed, 27% were aware of embedded networks while 4% said they were in one.

Residential consumers who lived in capital cities were more likely to be aware of embedded networks (9% vs. 4% of those living elsewhere).

Awareness was also higher among those who were renting (12% vs. 8% across the NEM) and those who displayed signs of greater engagement with the market – e.g. those who were aware of independent comparator websites (14%), had investigated their options in the past year (10%), or switched energy provider or plan in the past five years (9%).

Proportion of residential consumers aware of embedded networks and proportion of those in an embedded network (%)



NB: Results have been rebased as a proportion of all participants.

Base: Residential participants not in a freestanding house (n=555) or all small business participants (n=550). / Q67. Had you heard about the idea of “embedded networks” before today?
Base: Participants aware of embedded networks (n=125 residential, n=168 small business). / Q68. And based on this information, are you in an embedded network?

NB: Results for embedded networks have been rebased as a total of all NEM participants.



SERVICE BUNDLING AND CHOICE WITHIN EMBEDDED NETWORKS

Around a third (36%) of residential NEM consumers living within an embedded network said they received only electricity through this arrangement, and not other 'bundled' services. The majority therefore had bundled services.

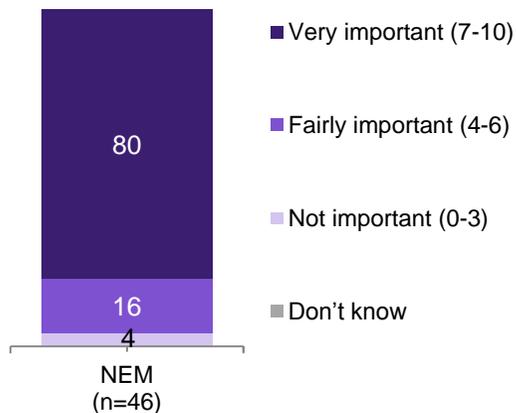
More than two in five (43%) also had gas connected through their embedded network, with a similar proportion (38%) accessing water through the same arrangement. Just over a third (35%) had internet access bundled into their network, while a quarter (25%) said the same of their telephone connection.

NEM residential consumers with additional, bundled services connected through embedded networks:

- 36% = Electricity only
- 43% + Gas
- 38% + Water
- 35% + Internet
- 25% + Telephone



Importance of choice for those within embedded networks – residential consumers (%)



Despite their constraints, four in five residential consumers within an embedded network felt it would be very important for them to have a choice between different energy providers and plans (80% rated the importance of this as 7 or higher). This is clear evidence that there is an appetite for consumers in embedded networks to see more options for people in their situation.

This was consistent with the nett result for all residential consumers in Tasmania (79%) and the Rest of Queensland (81%), who were also asked the question due to the relatively limited levels of competition in those jurisdictions.

Base: Participants in an embedded network (n=46 residential, n=20! small business). / Q69. Do you have any other services connected through this arrangement, like gas or water, or is it just for your electricity?
Base: Residential participants within an embedded network (n=47) or TAS and ROQ (n=349). / Q34b. And how important would it be for you to have a choice between a number of different electricity companies, plans and offers?

RESEARCH FINDINGS BY JURISDICTION



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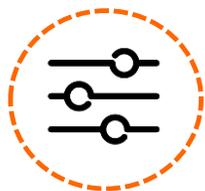


NEWGATE
RESEARCH

SOUTH EAST QUEENSLAND



NEWGATE
RESEARCH



SUMMARY OF RESULTS (SOUTH EAST QUEENSLAND)

There are signs of increased market engagement within South East Queensland, following deregulation of electricity prices and the launch of the Queensland Government's EnergySave consumer awareness campaign in mid-2016.

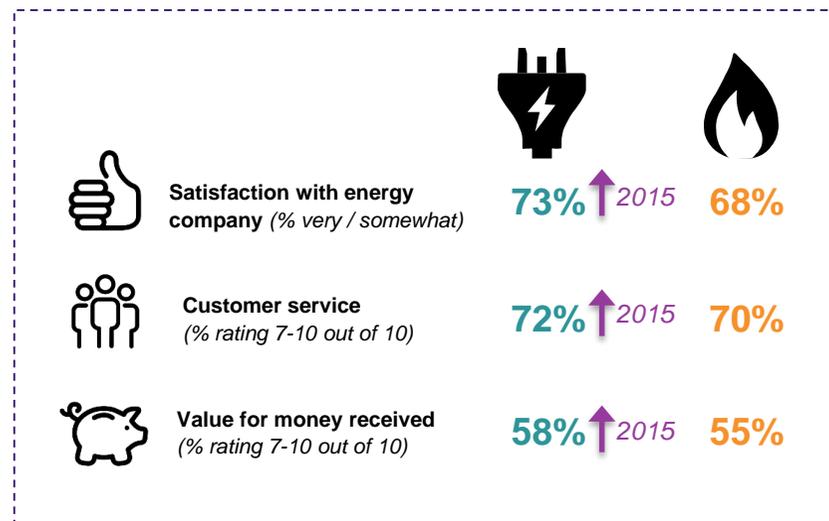
Awareness of the ability to choose different energy providers or plans remained slightly lower than the average across the NEM, though awareness of the ability to choose between different *electricity* plans increased gradually among residential consumers (up from 77% in 2015 to 81% this year). Around three in five were somewhat or very satisfied with the level of choice available in their state (nett 57%, up from 48% in 2015). Only 13% were dissatisfied with the level of choice – though when probed, 30% of residential consumers said there was not enough choice in Queensland.

While switching rates had not changed significantly for any *individual* metric, there was a nett increase in switching energy provider or plan in the past 12 months among residential consumers, up from 18% in 2016 to 24%. When asked about future switching intentions, over half of consumers surveyed said they were interested in better energy deals (nett 56% residential, 55% small business).

Rates of direct approaches by energy companies remained among the lowest in the NEM for residential South East Queensland consumers, while levels for small business consumers were consistent with other jurisdictions. Rates of self-led investigation, however, increased over the past year among residential consumers, from 26% to 33% – now more in line with small business consumers (36%).

Confidence in being able to find the right information in choosing a suitable energy deal continued to trend upwards, with two thirds of residential consumers feeling highly confident (66% gave a rating of 7 or more out of 10). General internet searching was the top source of information cited. Meanwhile, awareness of independent government comparator websites increased sharply, from 9% in 2016 to 25% this year – led in part by 19% recall for the new EnergySave campaign.

Satisfaction with their energy companies, customer service and value-for-money ratings have remained largely unchanged among South East Queenslanders.



↑↓ Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (SOUTH EAST QUEENSLAND)

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 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 in the page footer 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.

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.

Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

Sample sizes: South East Queensland (n=)	2014	2015	2016	2017
Residential				
All participants	702	402	425	399
Mains connected gas participants	-	69	79	84
Small Business				
All participants	101	100	100	100
Mains connected gas participants	-	9	10	13

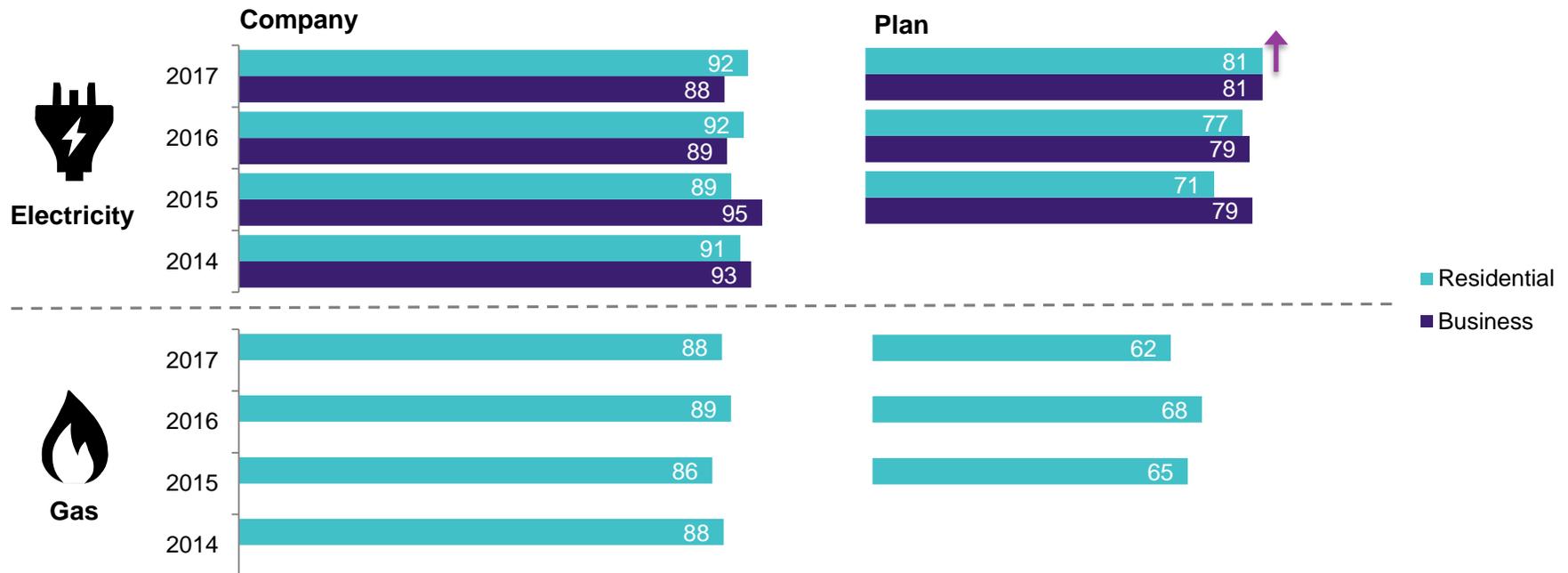


AWARENESS OF ABILITY TO CHOOSE

Awareness of choice in the South East Queensland energy market remained largely unchanged, though awareness of being able to choose from different electricity plans with the same retailer increased among residential consumers over the past two years, up from 71% in 2015 to 81%.

Consumers remained less aware of the option to choose different gas plans with three in five residential consumers (62%) believing this to be available.

Awareness of ability to choose energy company or plan (% True)



Base: SEQ participants (residential n=399, small business n=100) or those with mains gas (residential n=84). Due to low base sizes, gas results for small business consumers are not shown.

Q13a. True or false: People in your area can choose their electricity company? / Q13b. True or false: People in your area can choose their gas company? / Q13c. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms? / Q13d. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms?



INVESTIGATING OFFERS

Actively investigated offers or options in the past 12 months (% Yes)



There was an increase in the proportion of residential consumers who had actively investigated their energy options in the past 12 months (up from 26% in 2016 to 33%) – with levels at their highest since the survey commenced.

Investigation rates among small business consumers remained relatively steady over time, at 36% this year.

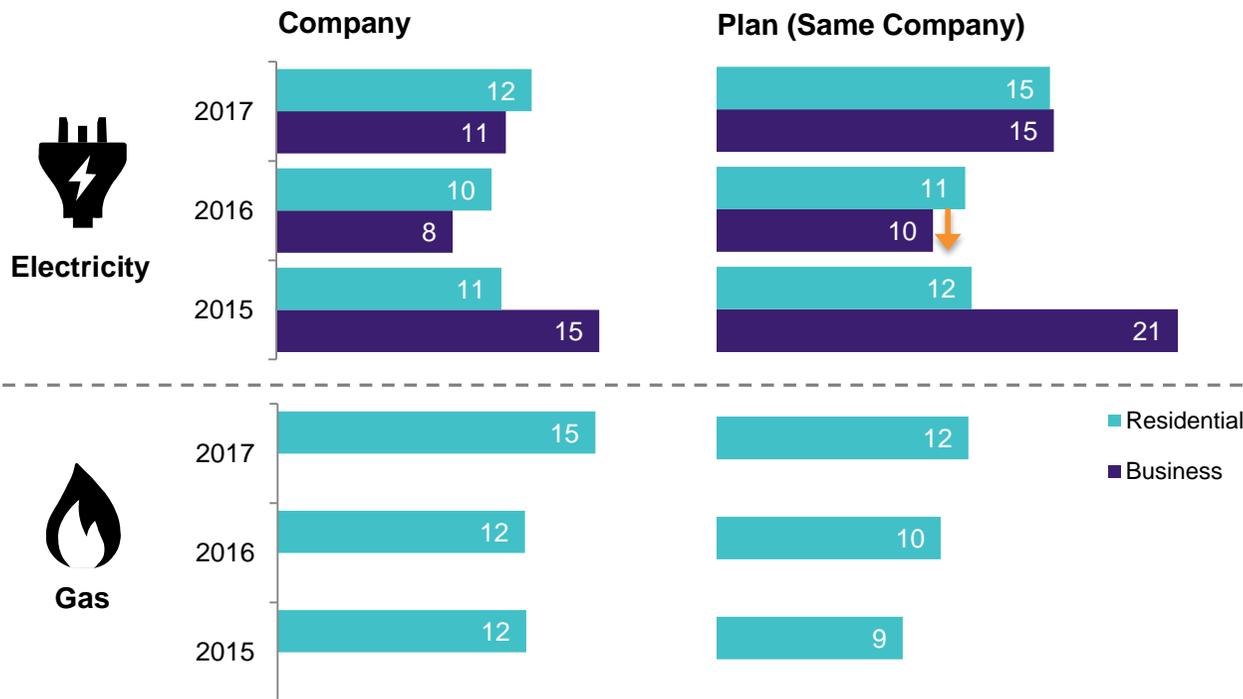
Base: SEQ participants (residential n=399, small business n=100). *Vulnerable consumers defined as those who have experienced financial hardship or difficulty paying their bills (indicated from D24 and D27)

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



RATES OF SWITCHING COMPANY OR PLAN

Switched in the past 12 months (% At least once)



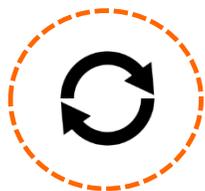
While switching rates did not change significantly for any of the individual switching metrics, the proportion of residential consumers who switched energy provider or plan in the past 12 months increased from 18% in 2016 to 24% this year.

Meanwhile, switching rates for small business consumers remained relatively steady, with 22% having made some kind of switch in the past year.



Switched energy company or plan in the past 12 months (Residential)

Base: SEQ participants (residential n=399, small business n=100) or those with mains gas (residential n=84). Due to low base sizes, gas results for small business consumers are not shown. Q17. In the past 12 months, how many times have you changed the following? (not asked in 2014)

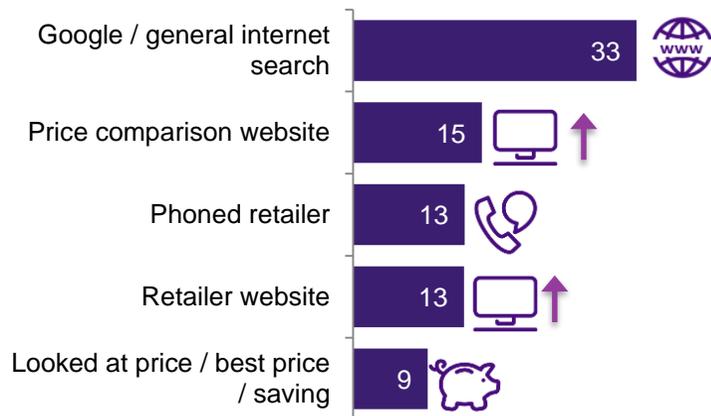


INFORMATION SOURCES USED TO SWITCH

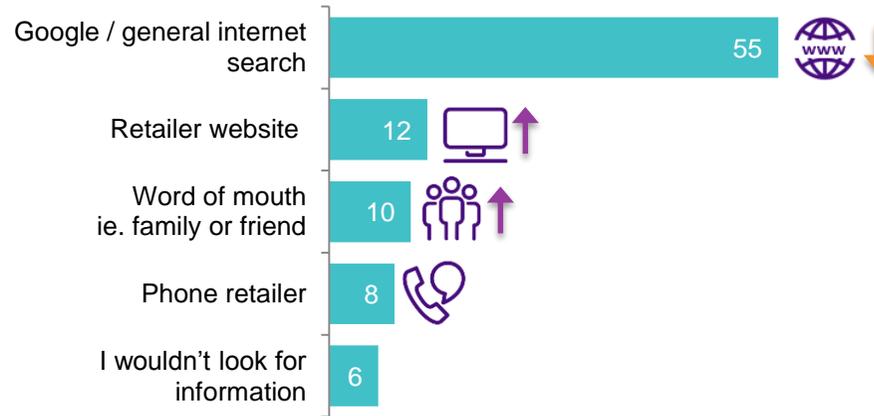
General internet searching remained the most commonly cited information source for residential consumers who had switched in the past 5 years or investigated options in the past 12 months at 33%. This was also true for those who had not switched or investigated at 55% however decreased significantly since 2016 at 66%. Among both groups, retailer websites were twice as likely to be cited as they were last year.

A quarter of residential consumers were aware of any government comparison websites (nett 25%), up sharply from just 9% last year. This follows the launch of the EnergySave campaign, with awareness at 19%, while awareness of Energymadeeasy remained steady at 13%.

Top 5 information sources used by those who switched or investigated offers (%)



Top 5 sources those who had not investigated or switched would use if they did want information (%)



Prompted + unprompted awareness of independent government comparator websites:

25%↑ Any independent comparator site

13% Energymadeeasy

19% EnergySave Campaign

Base: SEQ residential participants who switched energy company or plan in the past 5 years or who had investigated options in the last 12 months (n=240). / Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? / You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?

Base: SEQ residential participants who had not switched energy company or plan in the past 5 years or investigated options in the last 12 months (n=159). / 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? / Q40. Have you heard of the independent government comparator websites ...?

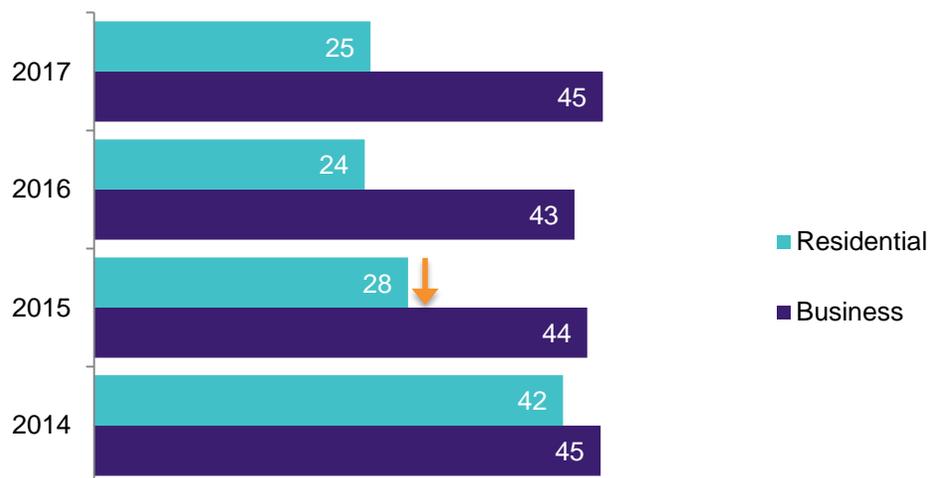


APPROACHED BY AN ENERGY COMPANY

The proportion of consumers approached by an energy company in the last 12 months has remained stable over the past three years. Only a quarter of residential consumers recalled a direct approach this year (25%), following the drop from 2014 levels (42%).

Rates of approach remained higher for small business consumers, at 45%, with these consumers most likely to have been contacted via phone (52%) or email (33%). Meanwhile, residential consumers were most likely to have been contacted via phone (49%) or a home visit (36%).

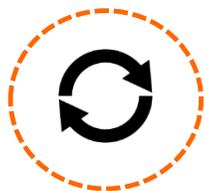
Approached by an energy company in the past 12 months (% Yes)



Top Methods of Approach (2017)

-  **49%** Residential
52% Business
-  **36%** Residential
18% Business
-  **17%** Residential
33% Business

Base: SEQ participants (residential n=399, small business n=100). / Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas? / Base: Participants who had been approached by an energy company in the past 12 months (residential n=97, small business n=45). / Q18B. In what ways were you approached by an energy company? Results shown are for telephone calls, door to door visits and emails – among those approached.

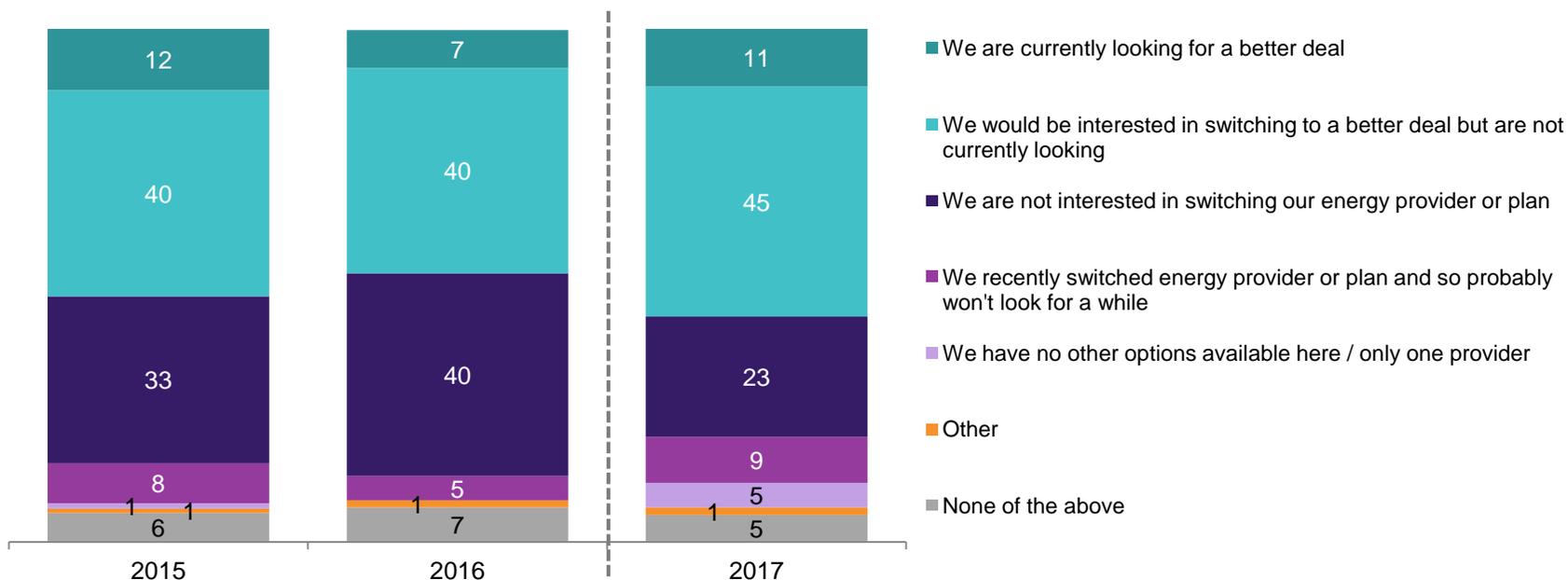


INTENTION TO SWITCH IN THE FUTURE

Over half of consumers surveyed in South East Queensland were interested in switching to a better deal (nett 56% residential, 55% small business), including around one in ten who were actively looking when surveyed (11% for both residential and small business consumers).

This year, 5% of residential consumers and 2% of small business consumers said they had no other options available. This is the first year this response option was included in the question, whereas in previous years the result for “we have no other options” was derived from open-ended responses – as such, comparisons over time should be made with caution.

Interest in *looking for a better deal* (%)



Base: SEQ residential participants (n=399).

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

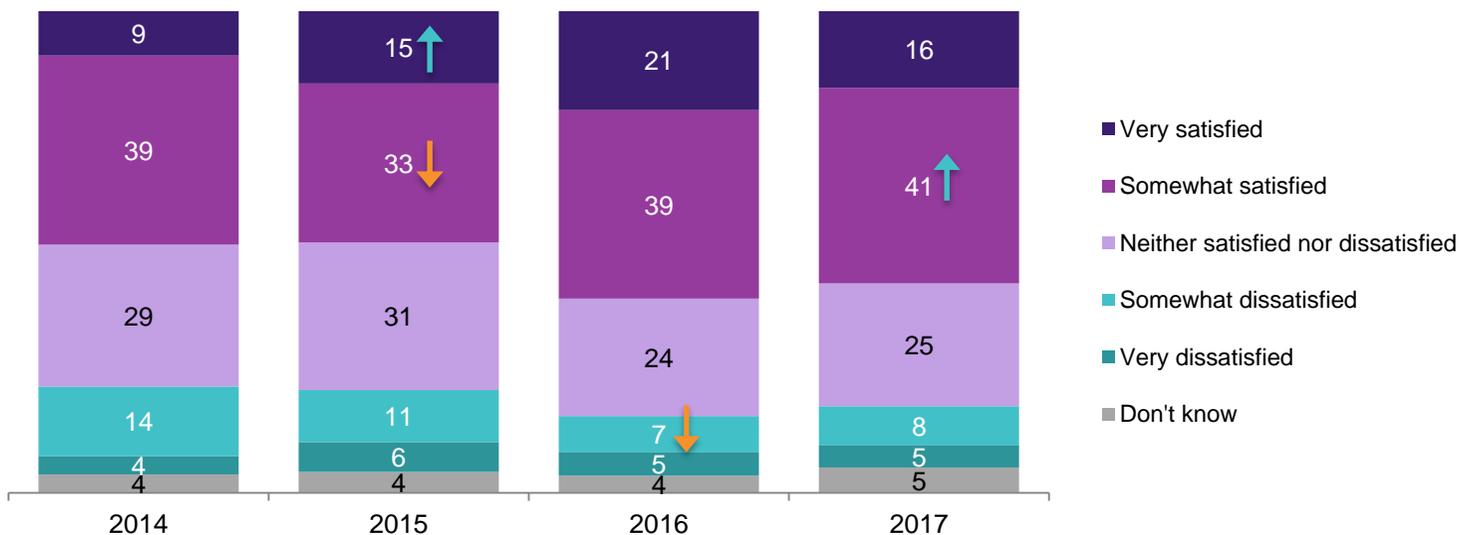


SATISFACTION WITH LEVEL OF CHOICE

Around three in five residential consumers said they were satisfied with the level of choice available in South East Queensland (nett 57%), up from 48% in 2015 due to an increase in the proportion of those saying they were only somewhat satisfied (from 33% in 2015 to 41%).

Overall, only nett 13% said they were dissatisfied with the level of choice. However, when probed, three in ten residential consumers said there was not enough choice (30%), while 42% felt it was just right and 16% said there was too much choice.

Satisfaction with the *level of choice* available (%)



Base: SEQ residential participants (n=399).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?

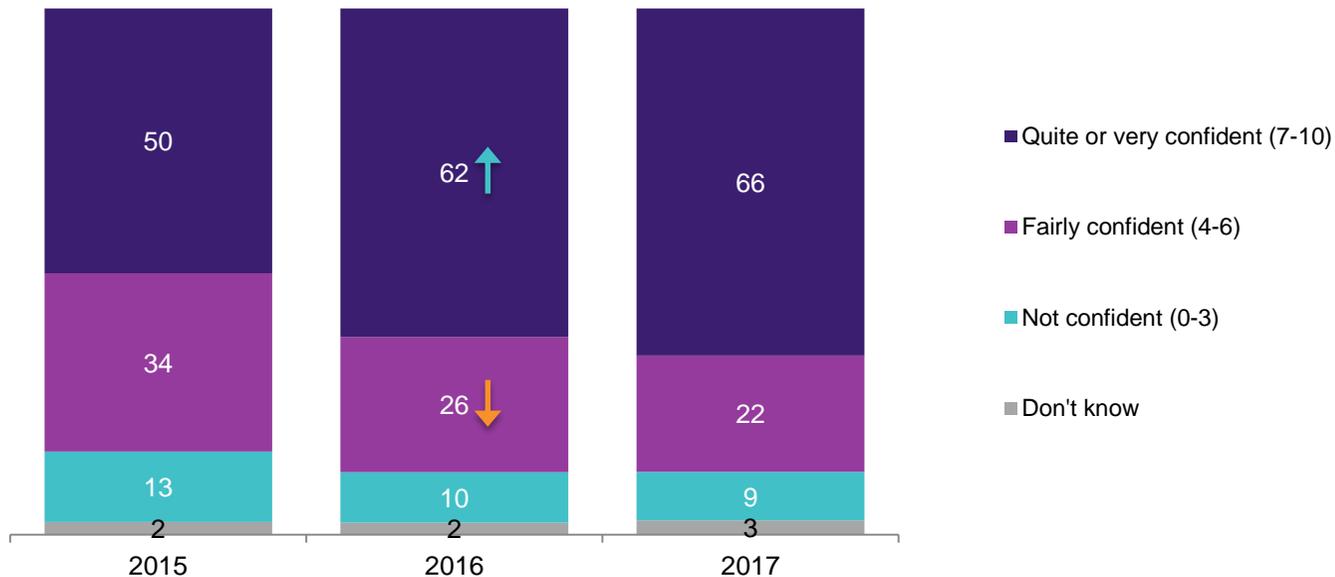


CONFIDENCE IN FINDING INFORMATION

Confidence in being able to find the right information regarding energy plans and deals continued to trend upwards among South East Queenslanders. Two thirds (66%) of residential consumers provided a high confidence rating of 7 or more out of 10, significantly above the level of 50% in 2015.

Conversely, the proportion of those who provided a moderate rating of between 4 and 6 remained lower than in 2015 (down from 34% to 22%), while around one in ten residential consumers have consistently provided low confidence ratings of between 0 and 3.

Level of confidence in finding the right information to help choose a suitable energy plan or deal (%)



Base: SEQ residential participants (n=399).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.



SATISFACTION WITH ENERGY COMPANIES

RESIDENTIAL CONSUMERS

Satisfaction with energy companies in South East Queensland has remained relatively steady over time, with around seven in ten residential consumers saying they were very or somewhat satisfied with their electricity (nett 73%) or gas company (nett 68%).

Since 2015, there has been an increase in the proportion of residential consumers who were *somewhat* satisfied with their electricity company (from 35% to 44%), with a corresponding decrease in those who were neither satisfied nor dissatisfied (from 26% in 2015 to 18% this year).

Satisfaction with electricity and gas company (%)



Very satisfied
 Somewhat satisfied
 Neither satisfied nor dissatisfied
 Somewhat dissatisfied
 Very dissatisfied
 Don't know

Base: SEQ residential participants (n=399) or those with mains gas (n=84).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?

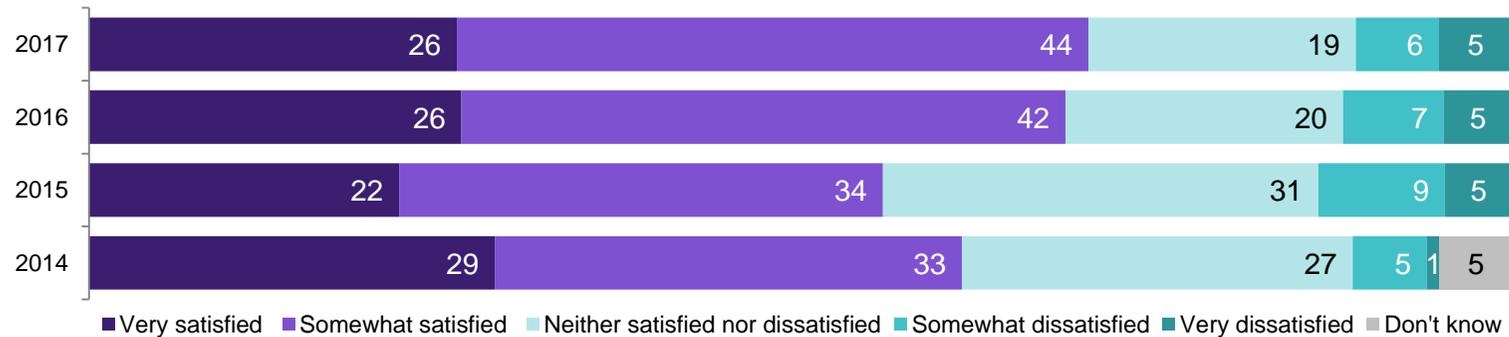


SATISFACTION WITH ENERGY COMPANIES

SMALL BUSINESS CONSUMERS

Satisfaction among small business consumers with their electricity company has remained steady over time, with 70% saying they were very or somewhat satisfied. There are indications of improved satisfaction ratings since 2015 (nett 56%), though these results are based on relatively small sample sizes.

Satisfaction with electricity company (%)



Base: SEQ small business consumers (n=100). Due to low base sizes, gas results for small business consumers have been omitted.

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



QUALITY OF CUSTOMER SERVICE

RESIDENTIAL CONSUMERS

Customer service ratings have remained largely unchanged for residential consumers, with around seven in ten providing high ratings of 7 or more out of 10 for their electricity (nett 72%) or gas company (nett 70%). The net 7+ ratings for customer service provided by electricity companies remained significantly higher than the lowest result of 61% in 2015.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: SEQ residential participants (n=399) or those with mains gas (n=84).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.



QUALITY OF CUSTOMER SERVICE

SMALL BUSINESS CONSUMERS

Customer service ratings for small business electricity consumers in South East Queensland have remained relatively stable over time, with the exception of the drop in 2015. In other years, two-thirds have consistently rated their electricity provider's service highly at 7 or more out of 10 (nett 67% in 2017).

Rating of overall *quality of customer service* provided by electricity company (%)



Base: SEQ small business consumers (n=100). Due to low base sizes, gas results for small business consumers have been omitted.

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.



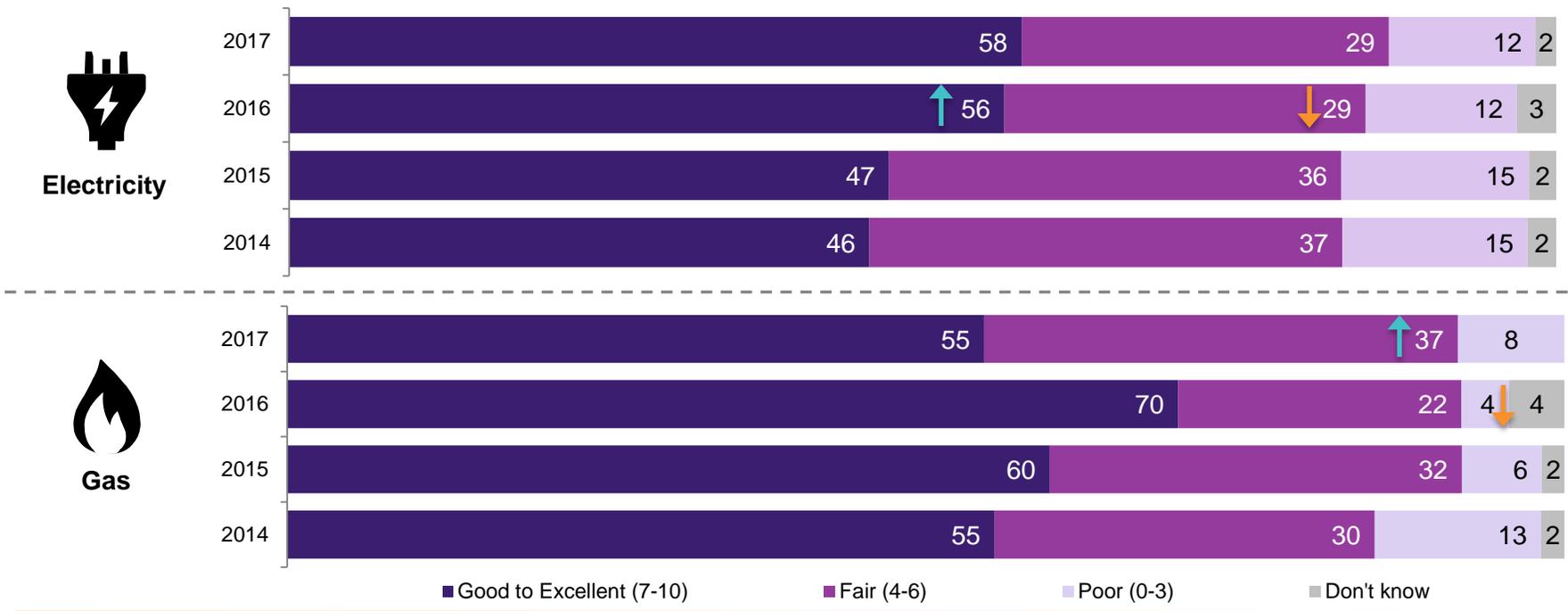
VALUE FOR MONEY PERCEPTIONS

RESIDENTIAL CONSUMERS

Consumer perceptions of value for money for electricity remained consistent year-on-year, with 58% of residential consumers providing high ratings of 7 or more (up from nett 47% in 2015 and nett 46% in 2014).

Meanwhile, there was a rise in ratings of between 4 and 6 for their gas company, up from 22% in 2016 to 37%, with high ratings of 7+ falling somewhat to 55%.

Rating of overall *value for money* provided by electricity and / or gas company (%)



Base: SEQ residential participants (n=399) or those with mains gas (n=84).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

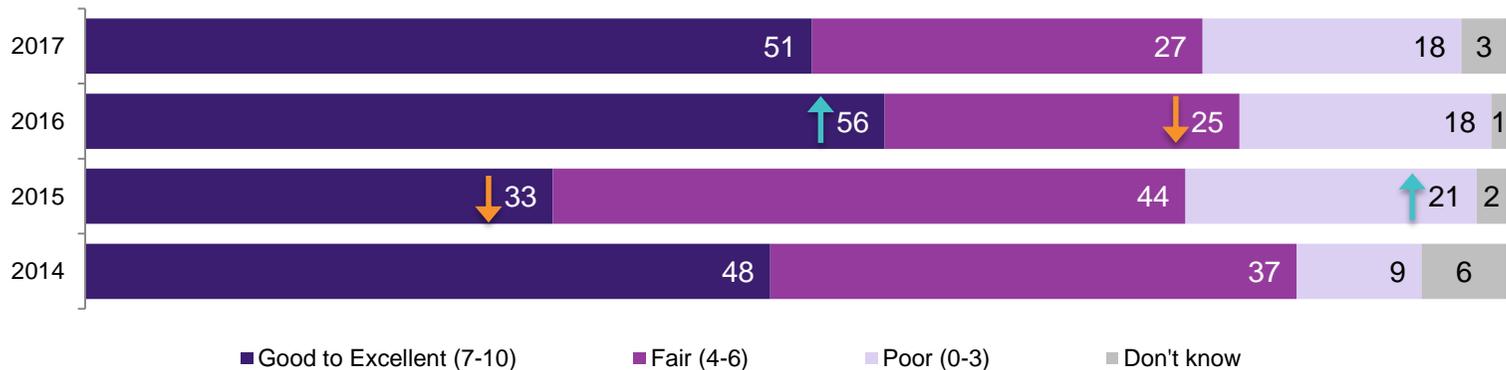


VALUE FOR MONEY PERCEPTIONS

SMALL BUSINESS CONSUMERS

Perceptions of value for money among small business consumers echoed their perceptions of customer service, with ratings of 7 or more out of 10 remaining largely consistent over time, with the exception of 2015 (from nett 33% to nett 51% this year).

Rating of overall *value for money* provided by electricity company (%)



Base: SEQ small business consumers (n=100). Due to low base sizes, gas results for small business consumers have been omitted.

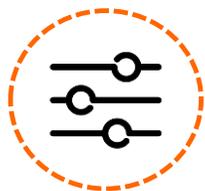
Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?

Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

REST OF QUEENSLAND



NEWGATE
RESEARCH



SUMMARY OF RESULTS (REST OF QUEENSLAND)

Consumers from regional Queensland (i.e. outside of South East Queensland – referred to herein as ‘Rest of Queensland’) exhibited many characteristics typical of those in smaller energy markets with limited choice.

Fewer than half of the consumers surveyed in this jurisdiction thought that people in their area could choose their energy company or plan, with results broadly stable against 2016. Indeed, dissatisfaction with the level of choice available remains high, with one in two saying they were very or somewhat dissatisfied (nett 50% for both residential and small business consumers). When probed further, two-thirds of residential consumers (67%) and three-quarters of small business consumers (74%) felt they didn’t have enough choice.

Perceptions of electricity companies also decreased among residential consumers, with lower ratings for both customer service (nett 56% ratings of 7 or more, down from 70% in 2016) and value for money (where nett ratings of 7-10 were at 36%, down from 51%). There are indications that perceptions of energy companies on other measures have declined among both residential and small business consumers in the Rest of Queensland, though sample sizes are too small for robust statistical testing of significance.

Despite these results, confidence *increased* among small business consumers in their ability to find the right information in choosing a suitable energy deal (60% provided ratings of 7 or more out of 10, up from 18% in 2016). Meanwhile, confidence among residential consumers was relatively steady, at 62% this year.

In terms of future switching intentions, around half of the consumers surveyed in the Rest of Queensland (53% residential, 46% small businesses) said they had no options available to them anyway, with only a quarter of residential consumers (nett 24%) and a third of small business consumers (nett 36%) interested in the idea of switching or currently looking to do so.



19% Satisfied with level of choice
(% very or somewhat)



47% Satisfaction with energy company* (% very / somewhat)



36% Value for money received* (% rating 7-10 out of 10)



56% Customer service* (% rating 7-10 out of 10)

* Due to low base sizes, gas results have been omitted.



Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (REST OF QUEENSLAND)

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 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 in the page footer 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.

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.

Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

Sample sizes: Rest of Queensland (n=)	2016	2017
Residential		
All participants	150	150
Mains connected gas participants	9	6
Small Business		
All participants	50	50
Mains connected gas participants	2	4



PERCEIVED ABILITY TO CHOOSE

Fewer than half of the consumers surveyed in the Rest of Queensland thought that people in their area could choose their energy company or plan, with results broadly stable against 2016.

Perceived ability to choose electricity company or plan (% True)



Base: ROQ participants (residential n=150, small business n=50). Due to low base sizes, gas results are not shown.

Q13a/c. True or False: People in your area can choose their electricity company/plan? Q13b/d. True or False: People in your area can choose their gas company/plan?

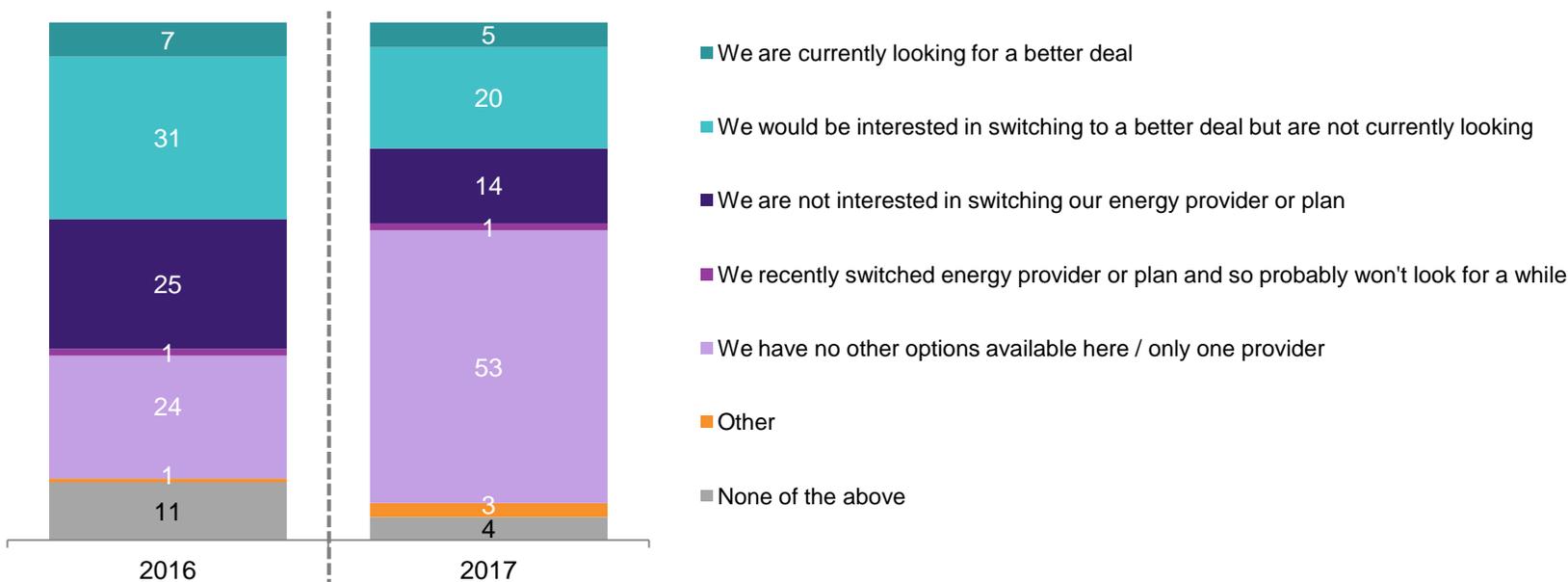


INTENTION TO SWITCH IN THE FUTURE

When asked about switching intentions, around half of the consumers surveyed in regional Queensland (53% residential, 46% of small businesses) said they had no other options available anyway. It is worth noting this was the first year this response option was included in the question, whereas the 2016 result for “we have no other options” was derived from open-ended (‘other – specify’) responses. Consequently, comparisons over time should be made with caution.

Only one in four residential consumers (nett 24%) and a third of small business consumers (nett 36%) were interested or currently looking into switching.

Interest in *looking for a better deal* (%)



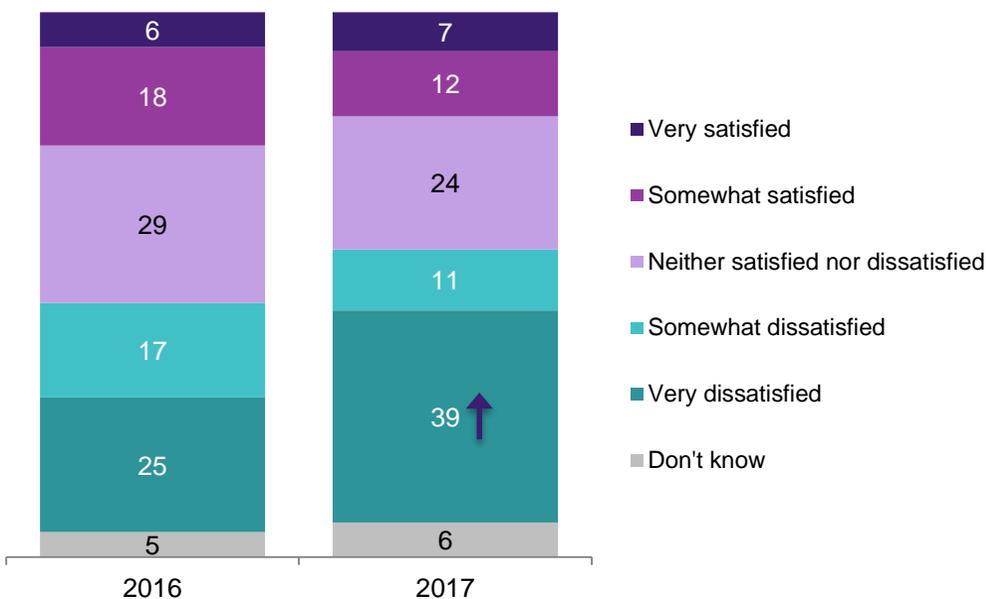
Base: ROQ residential participants (n=150).

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



SATISFACTION WITH LEVEL OF CHOICE

Satisfaction with the *level of choice* available (%)



One in two residential consumers in regional Queensland were dissatisfied with their level of choice in energy options (nett 50%, up somewhat from 42% in 2016). Notably, 39% said they were 'very' dissatisfied, which is up significantly from 25% in 2016.

Sentiment among small business consumers was similar, with one in two saying they were dissatisfied (nett 50%). This is somewhat lower than the 64% level observed in 2016, though this is not significant, likely due to the small sample of n=50 businesses.

When prompted, two-thirds of residential consumers (67%) felt that they didn't have enough choice, while just 3% felt they had too much choice. Among small business consumers, 74% said they didn't have enough choice, and 4% felt there was too much choice.

Base: ROQ residential participants (n=150).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?

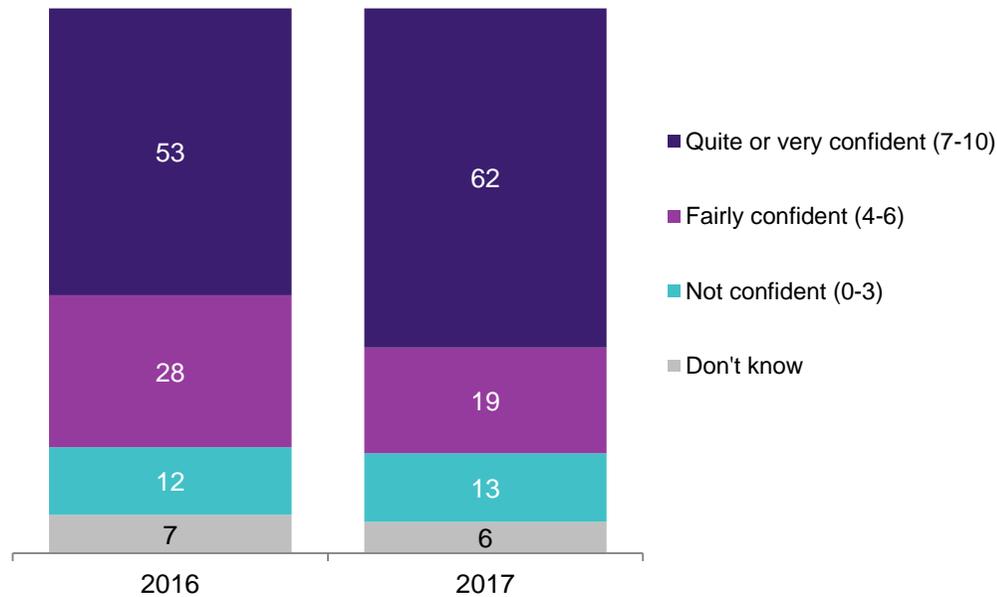


CONFIDENCE IN FINDING INFORMATION

Confidence in being able to find the right information about energy plans and deals rose slightly this year, with the majority of residential consumers rating their confidence highly, at 7 or more out of 10 (at 62%, up from 53% in 2016).

However, confidence among small business consumers surged over the same period, with ratings of 7 or more up from 18% in 2016 to 60%.

Level of *confidence in finding the right information* to help choose a suitable energy plan or deal (%)



Base: ROQ residential participants (n=150).

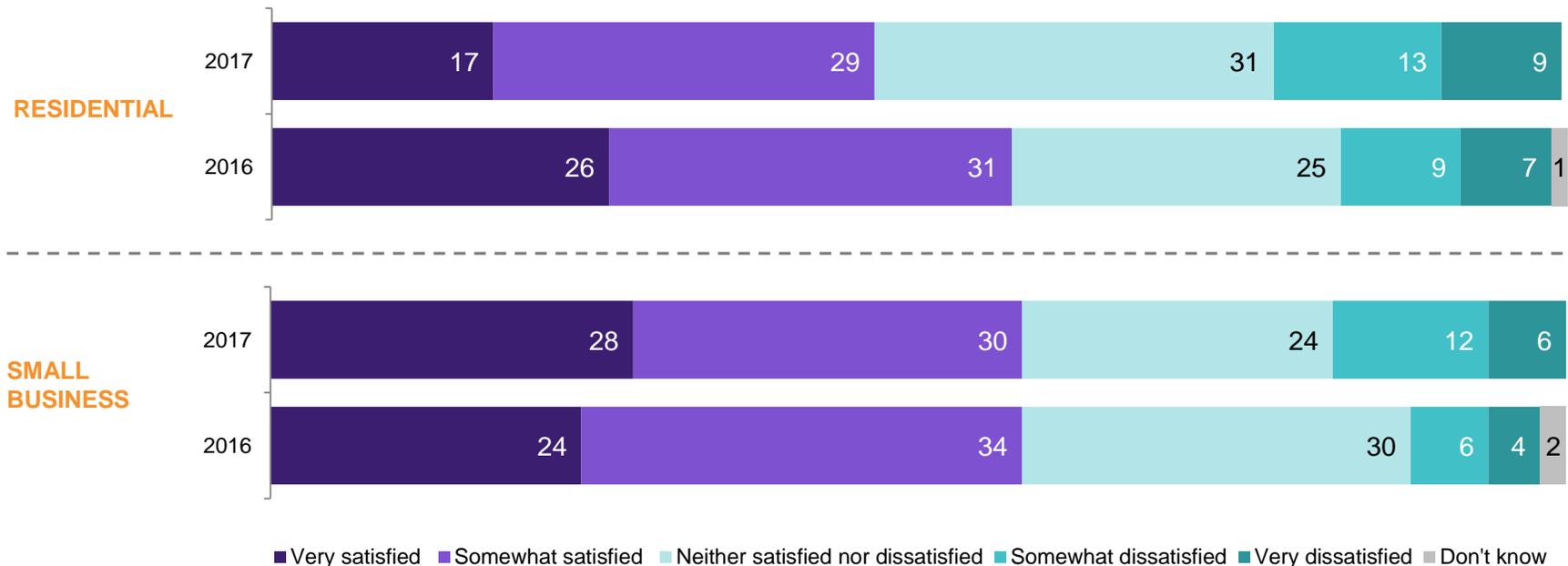
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.



SATISFACTION WITH ENERGY COMPANIES

Satisfaction with electricity companies was somewhat lower this year, with 47% of residential consumers saying they were either very or somewhat satisfied (vs. 57% in 2016). In contrast to most other jurisdictions, satisfaction among small business consumers was slightly higher than residential consumers, with 58% saying they were very or somewhat satisfied (unchanged from 2016).

Satisfaction with electricity company (%)



Base: ROQ participants (residential: n=150, small business: n=50). Due to low base sizes, residential gas results have been omitted.

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



QUALITY OF CUSTOMER SERVICE

Customer service ratings have declined for electricity companies in the Rest of Queensland, with 56% of residential consumers and 52% of small business consumers providing high ratings of 7 or more compared with 70% and 68% respectively last year. Further, there was a significant increase in poor ratings of less than 4 out of 10 among small business consumers this year (12%, up from 0% in 2016).

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: ROQ participants (residential: n=150, small business: n=50). Due to low base sizes, residential gas results have been omitted.

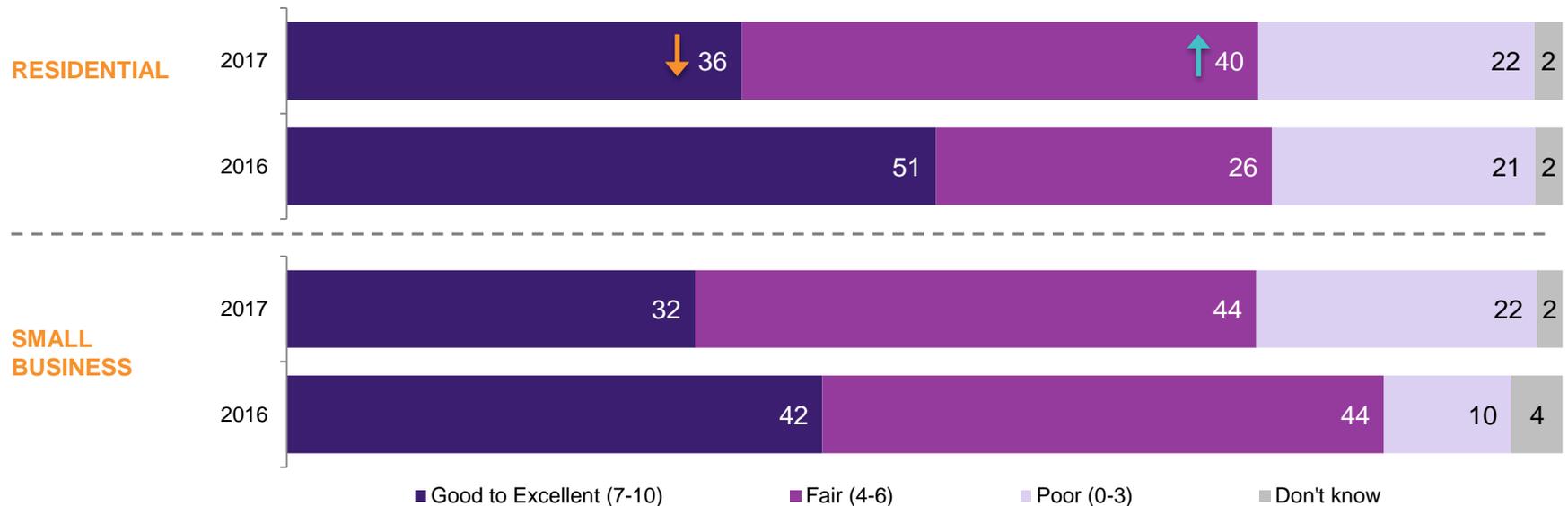
Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?
/ Q8. How would you rate the overall quality of customer service provided by your gas company?



VALUE FOR MONEY PERCEPTIONS

Perceptions of value for money have dropped significantly compared with 2016; only around one in three consumers provided a rating of 7 or more out of 10 on this measure (36% residential, 32% small businesses) – down from 51% and 42% last year.

Rating of overall *value for money* provided by electricity company (%)



Base: ROQ participants (residential: n=150, small business: n=50). Due to low base sizes, residential gas results have been omitted.

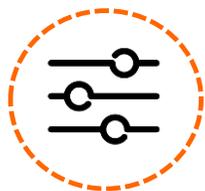
Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?

/Q9. How would you rate the overall value for money provided by your gas company?

NEW SOUTH WALES



NEWGATE
RESEARCH



SUMMARY OF RESULTS (NEW SOUTH WALES)

Despite being one of the first jurisdictions to deregulate, and with some of the highest levels of market engagement among jurisdictions in the NEM, NSW continued to record increases across a number of key metrics.

Awareness of choice in energy providers or plans remained strong, with increased awareness of the ability to choose different gas plans among residential consumers (from 73% in 2016 to 84% this year), and more gradual increases in awareness of the option to switch electricity companies (up from 89% in 2015 to 94%) and plans (from 81% in 2015 to 86%). Satisfaction with the level of choice in the energy market remained stable, with 60% of residential consumers satisfied. When probed, almost a quarter said there was too much choice (23%), while 20% disagreed and said there was not enough.

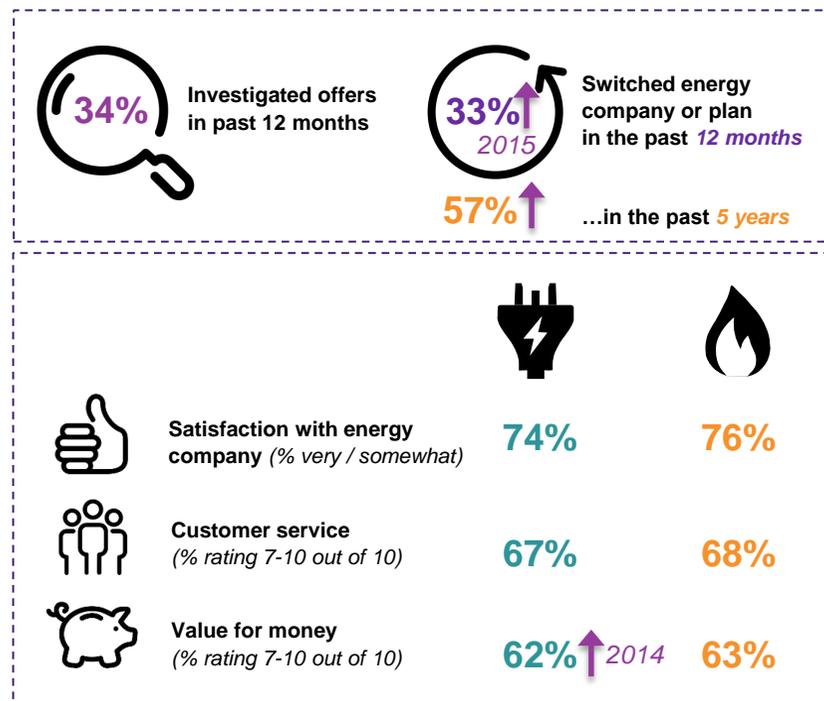
Overall switching of energy companies or plans in the previous 12 months continued to trend upwards, rising significantly from 24% in 2015 to 33% this year. This was driven by an increase in residential consumers switching electricity providers over this period (from 14% to 19%). When asked about future switching intentions, around three in five were interested in or currently exploring new energy deals (57% residential, 63% small business). Indeed 17% of residential consumers were actively looking at the time of the survey – the highest of all jurisdictions.

Rates of direct approaches by energy companies remained stable, with phone calls the most likely method of approach for both residential and small business consumers. Self-led investigation rates also remained stable, with 34% of NSW consumers having recently explored energy options.

Meanwhile, confidence in being able to find the right information improved year-on-year, up from 62% of residential consumers giving a high confidence rating of 7 or more out of 10 in 2016, to 72%. The same trend and confidence levels are evident among small business consumers.

While general internet searching was the top source of information cited, there has been an increase in visits to retailer websites and price comparison websites. Awareness of independent comparator sites remained unchanged at 21%.

NSW consumers' perceptions of their energy companies remained largely unchanged year-on-year in terms of satisfaction, service and value for money.



↑ ↓ Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (NEW SOUTH WALES)

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Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

Sample sizes: New South Wales (n=)	2014	2015	2016	2017
Residential				
All participants	325	402	480	400
Mains connected gas participants	141	163	213	201
Small Business				
All participants	76	100	100	101
Mains connected gas participants	21	21	23	29



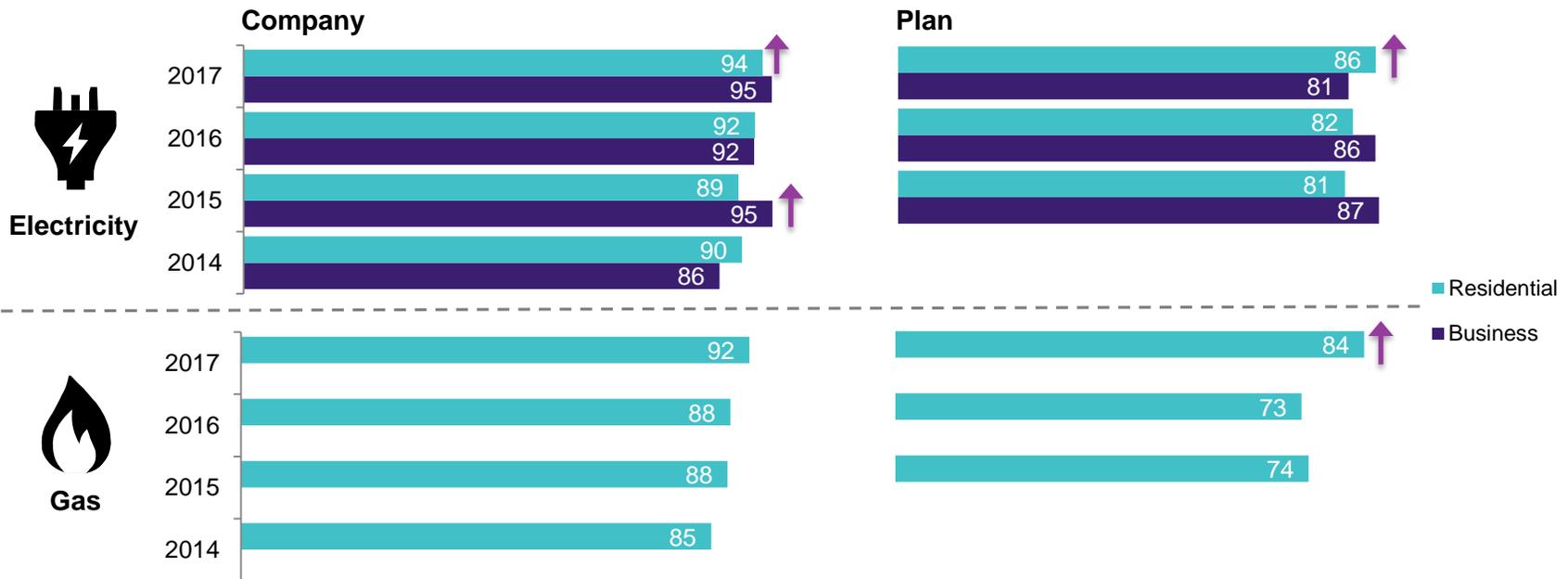
AWARENESS OF ABILITY TO CHOOSE

Awareness of choice in the energy market remained strong in NSW.

Among residential consumers, awareness of choice in gas plans increased year-on-year from 73% to 84%, accompanied by an increase over the past two years in awareness of choice in both electricity providers (from 89% in 2015 to 94%) and electricity plans (from 81% in 2015 to 86%).

Among small business consumers, awareness of choice in electricity provider remained higher than in the benchmark year (86% in 2014 vs. 95%).

Awareness of ability to choose energy company or plan (% True)

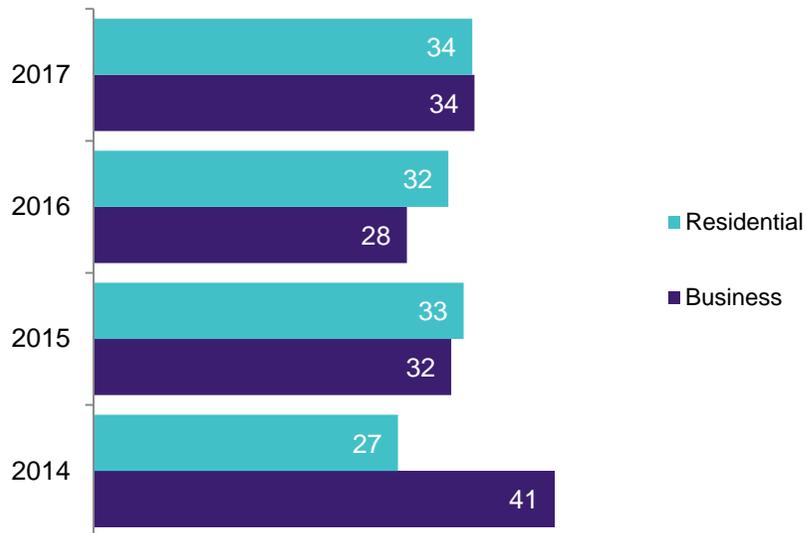


Base: NSW participants (residential n=400, small business n=101) or those with mains gas (residential n=201). Due to low base sizes, gas results for small business consumers are not shown. Q13a. True or false: People in your area can choose their electricity company? / Q13b. True or false: People in your area can choose their gas company? / Q13c. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms? / Q13d. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms?



INVESTIGATING OFFERS

Actively investigated offers or options in the past 12 months (% Yes)



Investigation rates in NSW have remained relatively stable over time, with 34% of both residential and small business consumers having actively investigated their energy options in the past 12 months this wave.

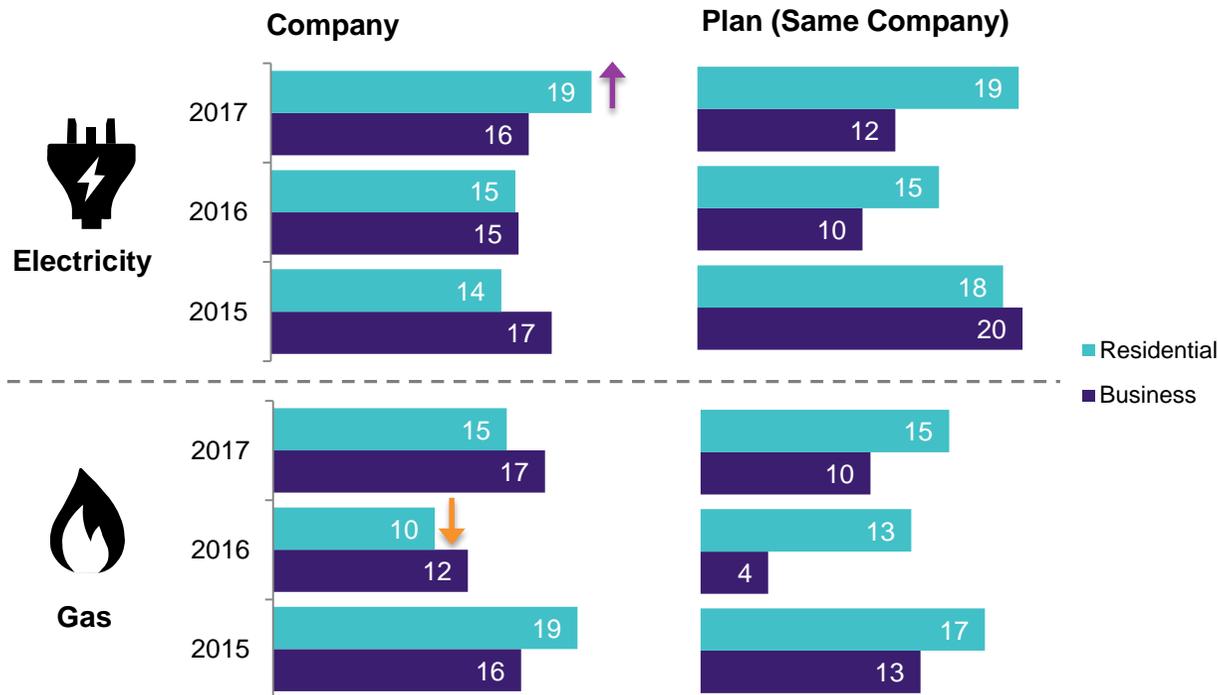
Base: NSW participants (residential n=400, small business n=101).

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



RATES OF SWITCHING COMPANY OR PLAN

Switched in the past 12 months (% At least once)

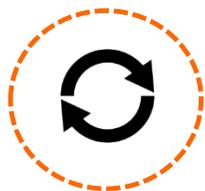


Switching rates have continued to trend upwards in NSW. There has been an increase over the past two years in residential consumers switching any energy provider or plan, from 24% in 2015 to 33% this year.

This has been driven by an increase in switching electricity providers between 2015 and 2017 (from 14% to 19%) – the first increase in NSW in the history of the study.



Base: NSW participants (residential n=400, small business n=101) or those with mains gas (residential n=201, small business n=30).
Q17. In the past 12 months, how many times have you changed the following? (not asked in 2014)

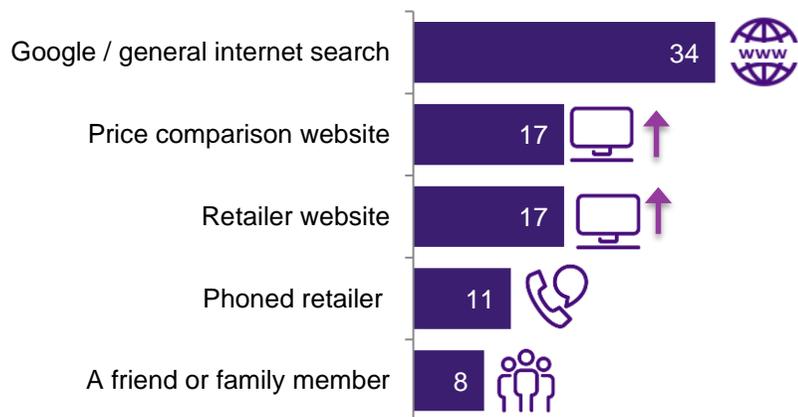


INFORMATION SOURCES USED TO SWITCH

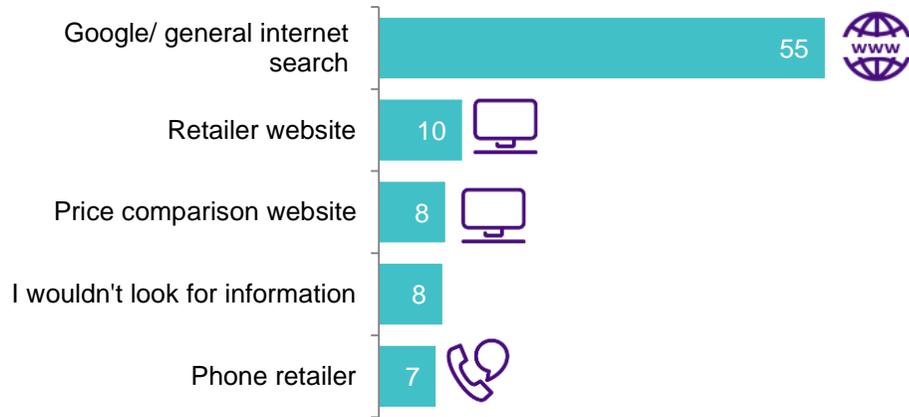
The use of retailer websites when researching energy options increased among residential consumers who had switched in the last 5 years or investigated options in the past 12 months (from 9% in 2016 to 17% this year). The most common information source among those who switched or investigated was again Google / internet searches at 34%, which was also the source that those who did neither thought they would use (55%).

The use of price comparison websites also increased among residential consumers who switched or investigated their options (from 9% in 2016 to 17% this year). Total awareness of independent comparison websites remained unchanged, at 21% for residential consumers and 19% of small businesses surveyed.

Top 5 information sources used by those who **switched or investigated offers** (%)



Top 5 sources those who **had not investigated or switched would use if they did want information** (%)



Prompted and unprompted awareness of independent government comparator websites:

21% Any independent comparator site

13% Energymadeeasy

11% youenergy.nsw.gov.au

8% Power in Your Hands

Base: NSW residential participants who switched energy company or plan in the past 5 years or who had investigated options in the last 12 months (n=263). / Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? / You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?

Base: NSW residential participants who had not switched energy company or plan in the past 5 years or investigated options in the last 12 months (n=137). / 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? / Q40. Have you heard of the independent government comparator websites ...?



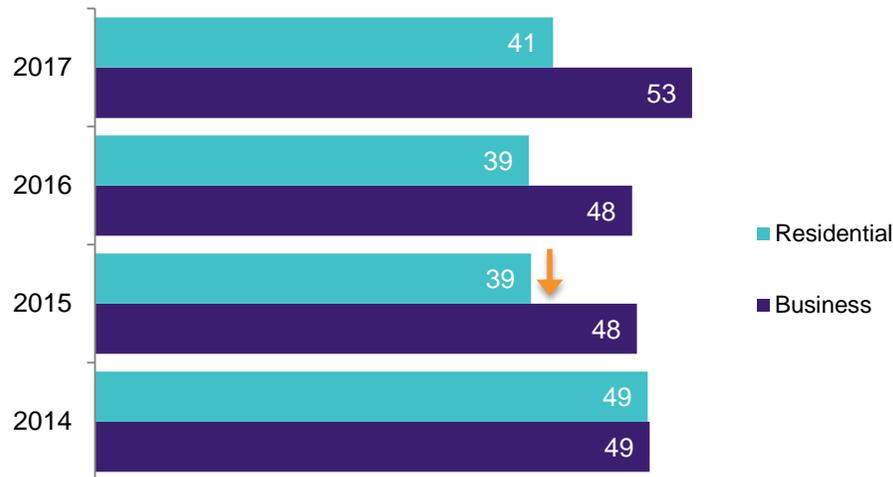
APPROACHED BY AN ENERGY COMPANY

Two in five residential consumers (41%) reported being approached by an energy company in the past 12 months, consistent with results for the past few years and still lower than the 49% benchmark result in 2014.

Meanwhile, around one in two small business consumers had been approached (53%), consistent with previous years.

Telephone calls and home visits were the most common methods retailers had employed.

Approached by an energy company in the past 12 months (% Yes)



Top Methods of Approach (2017)



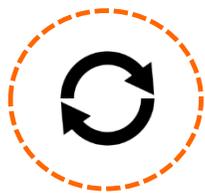
48% Residential
52% Business



31% Residential
28% Business

Base: NSW participants (residential n=400, small business n=101). / Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Base: Participants who had been approached by an energy company in the past 12 months (residential n=163, small business n=54). / Q18B. In what ways were you approached by an energy company? Results shown are for telephone calls and door to door visits – among those approached.

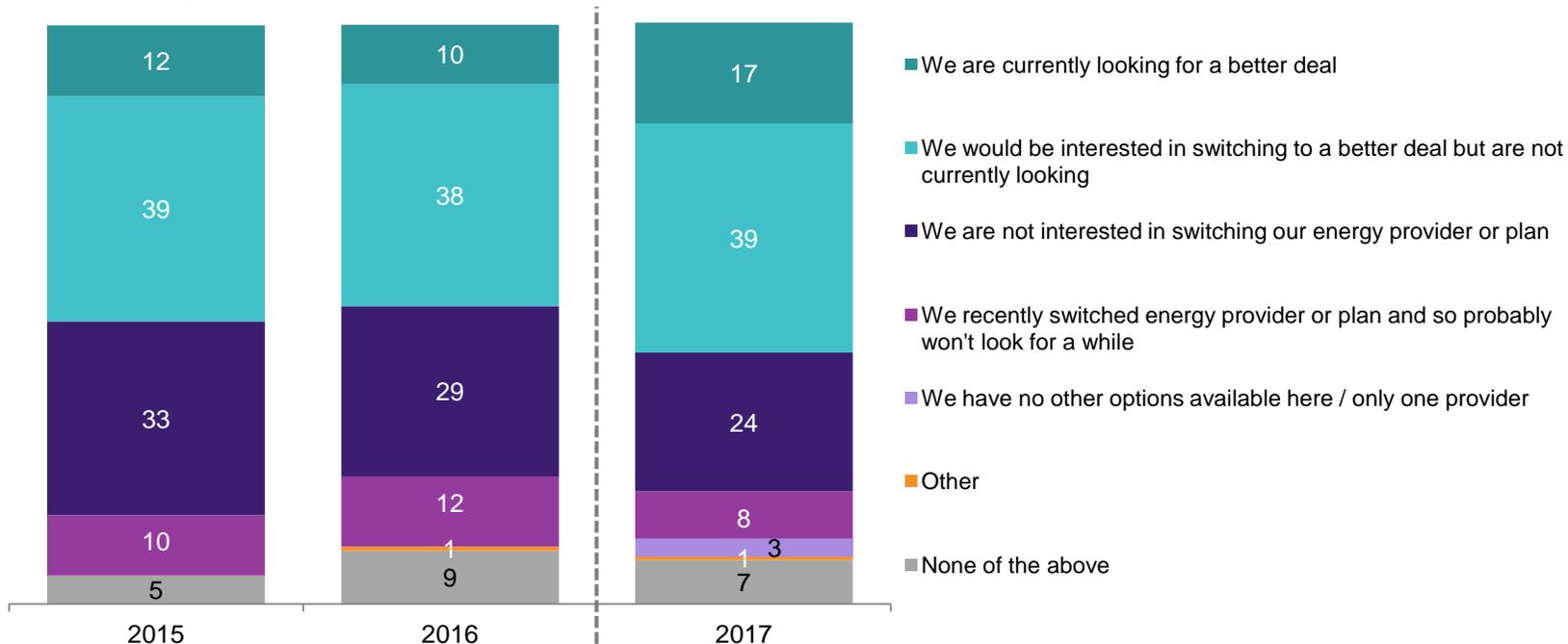


INTENTION TO SWITCH IN THE FUTURE

Around three in five consumers surveyed were interested in switching to a better deal or currently looking (nett 57% residential, 63% small business). This included 17% of residential consumers who were actively looking (the highest of all jurisdictions), and 12% of small business consumers doing likewise.

This year, 3% of residential consumers said they had no other options. It is worth noting this is the first year this response option was included in the question, whereas in previous years the code was derived from open-ended responses; consequently, comparisons over time should be made with caution.

Interest in *looking for a better deal* (%)



Base: NSW residential participants (n=400).

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



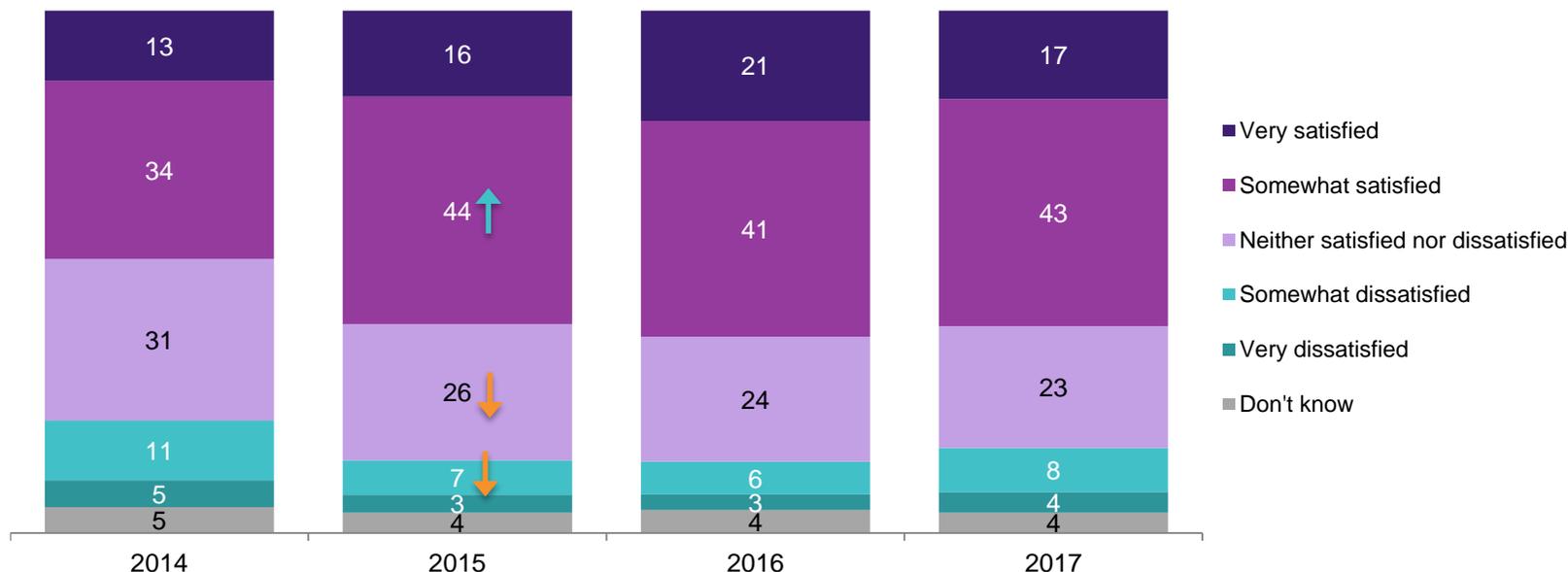
SATISFACTION WITH LEVEL OF CHOICE

Satisfaction with the level of choice in the NSW energy market has remained steady over the last three years and is still higher than in the benchmark year. The majority of residential consumers were satisfied, at 60% somewhat / very satisfied, up from 48% in 2014, as were small businesses, at 67%.

Overall, only 12% of residential consumers and 8% of small businesses surveyed were dissatisfied with the level of choice, which has also remained steady over the last three years.

When probed, nearly a quarter of residential NSW consumers felt there was too much choice (23%), with 20% saying there was not enough choice and 49% saying the level of choice was just right. Results were very similar among small businesses: 54% said just right, 23% too much and 13% not enough.

Satisfaction with the *level of choice* available (%)



Base: NSW residential participants (n=400).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?

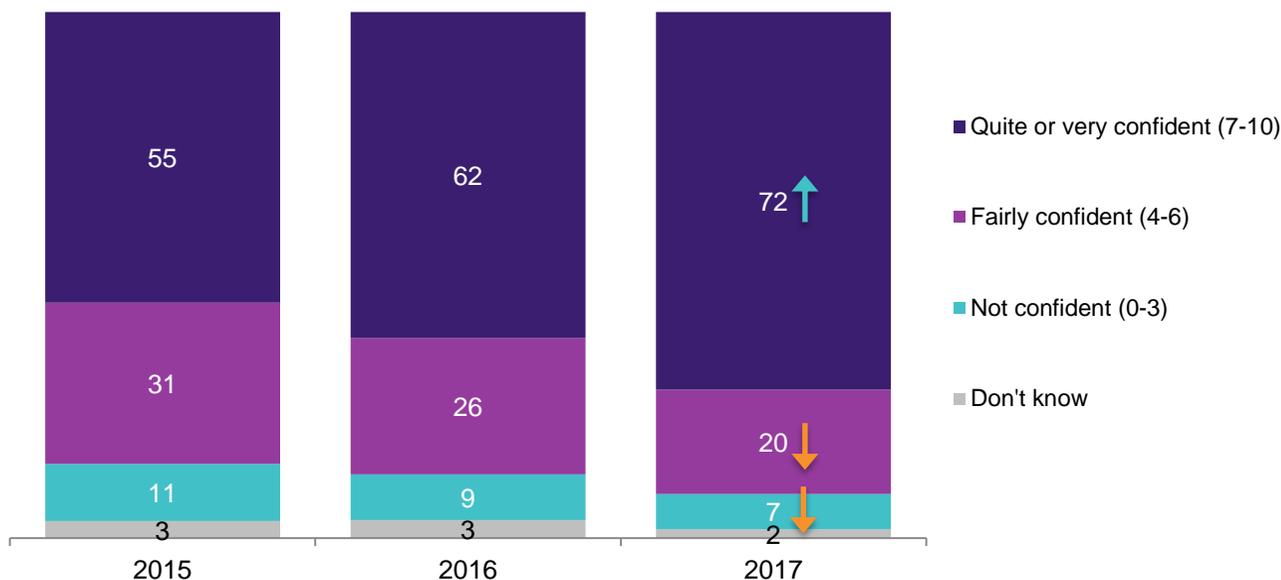


CONFIDENCE IN FINDING INFORMATION

Confidence among residential consumers in being able to find the right information regarding energy options increased year-on-year, from 62% providing ratings of 7 or more out of 10 in 2016 to 72%. This has been accompanied by a corresponding decrease in both mid-range ratings of 4-6 and low confidence ratings of 0-3 since 2015.

Results and trends were similar for small business consumers, with nett high confidence ratings of 7+ rising from 45% in 2015 to 72% this year.

Level of confidence in finding the right information to help choose a suitable energy plan or deal (%)



Base: NSW residential participants (n=400).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.

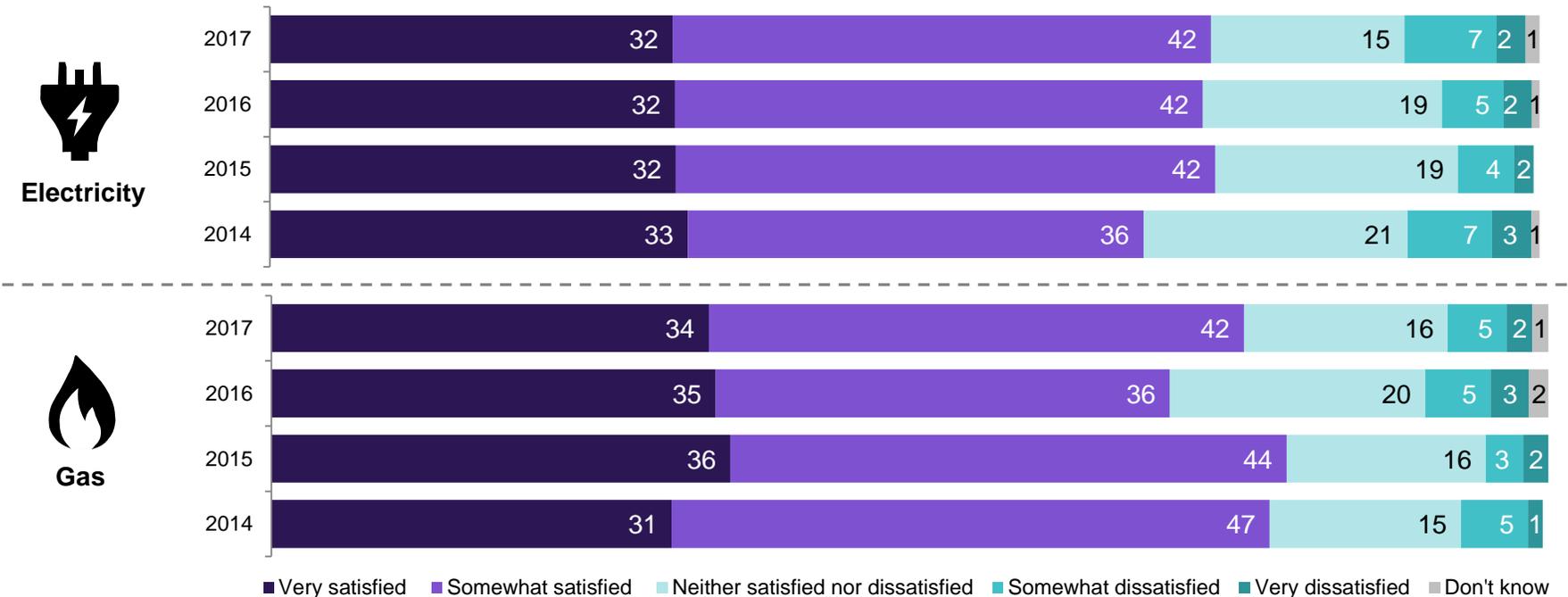


SATISFACTION WITH ENERGY COMPANY

RESIDENTIAL CONSUMERS

Residential consumer satisfaction with both their electricity and gas companies has been stable over time, with 74% of electricity customers and 76% of gas customers saying they were very or somewhat satisfied with their retailer this year.

Satisfaction with electricity and gas company (%)



Base: NSW residential participants (n=400) or those with mains gas (n=201).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



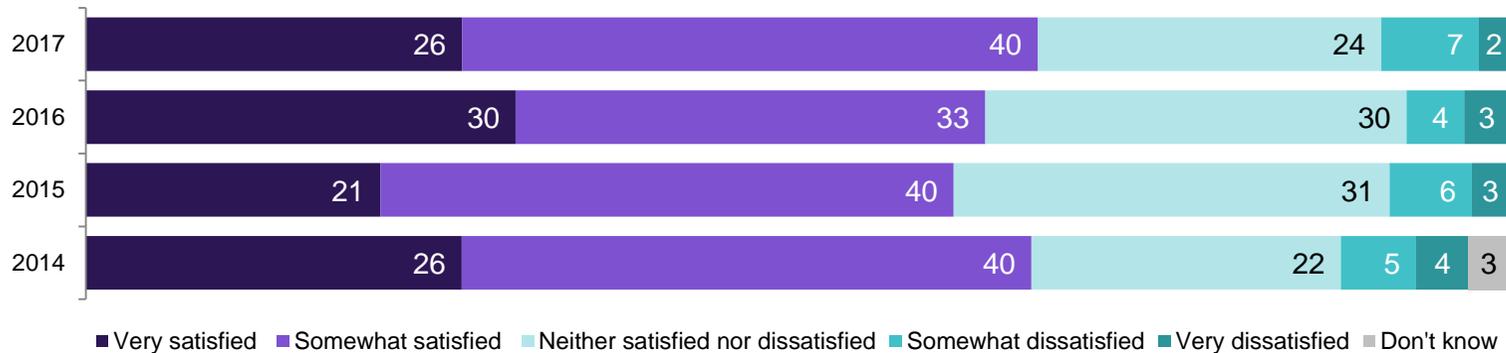
SATISFACTION WITH ENERGY COMPANY

SMALL BUSINESS CONSUMERS

Similar to residential consumers in NSW, small business customer satisfaction with their electricity and gas companies has remained relatively stable over the past four years, now at nett 67% for electricity retailers and nett 73% for gas retailers.

Note results for small business gas consumers have not been charted due to low base sizes (i.e. n<30) in earlier years.

Satisfaction with electricity and gas company (%)



Base: NSW small business participants (n=101) or those with mains gas (n=30).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



QUALITY OF CUSTOMER SERVICE

RESIDENTIAL CONSUMERS

Similar to customer satisfaction, residential customer service ratings have shown strong stability in NSW over the past four years. The majority rated the customer service they receive highly at 7 or more out of 10, at 67% for electricity companies and 68% for gas companies.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: NSW residential participants (n=400) or those with mains gas (n=201).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.



QUALITY OF CUSTOMER SERVICE

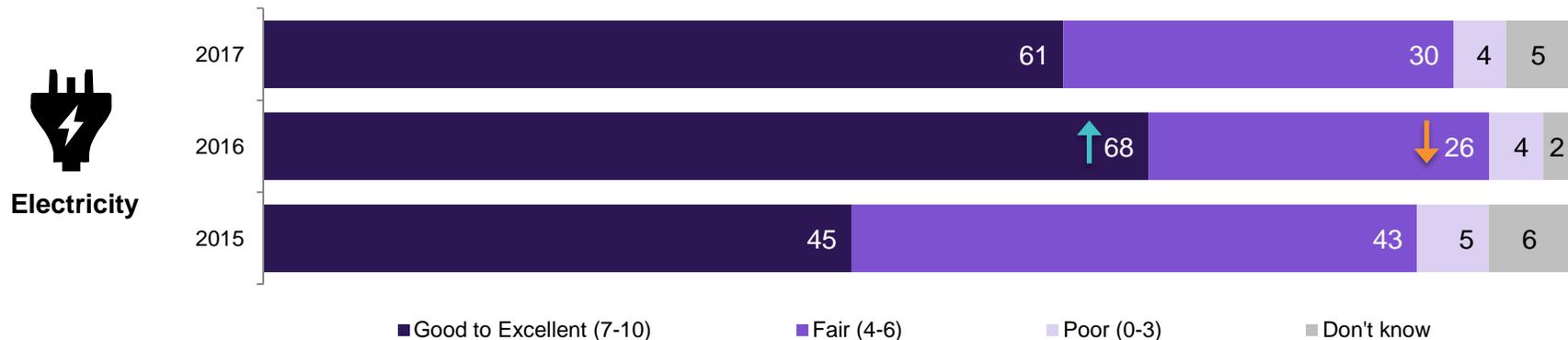
SMALL BUSINESS CONSUMERS

Ratings of customer service quality among small business consumers in NSW were relatively higher for gas companies than electricity retailers, with 73% giving a high rating of 7 or more out of 10 to their gas company vs. 61% for their electricity provider.

Results for small business electricity customers remained higher than the drop in 2015, up from nett 45% ratings of 7 or more.

Note that results for small business gas customers are not charted due to low base sizes (i.e. $n < 30$) in earlier years.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: NSW small business consumers ($n=101$) or those with mains gas ($n=30$).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.



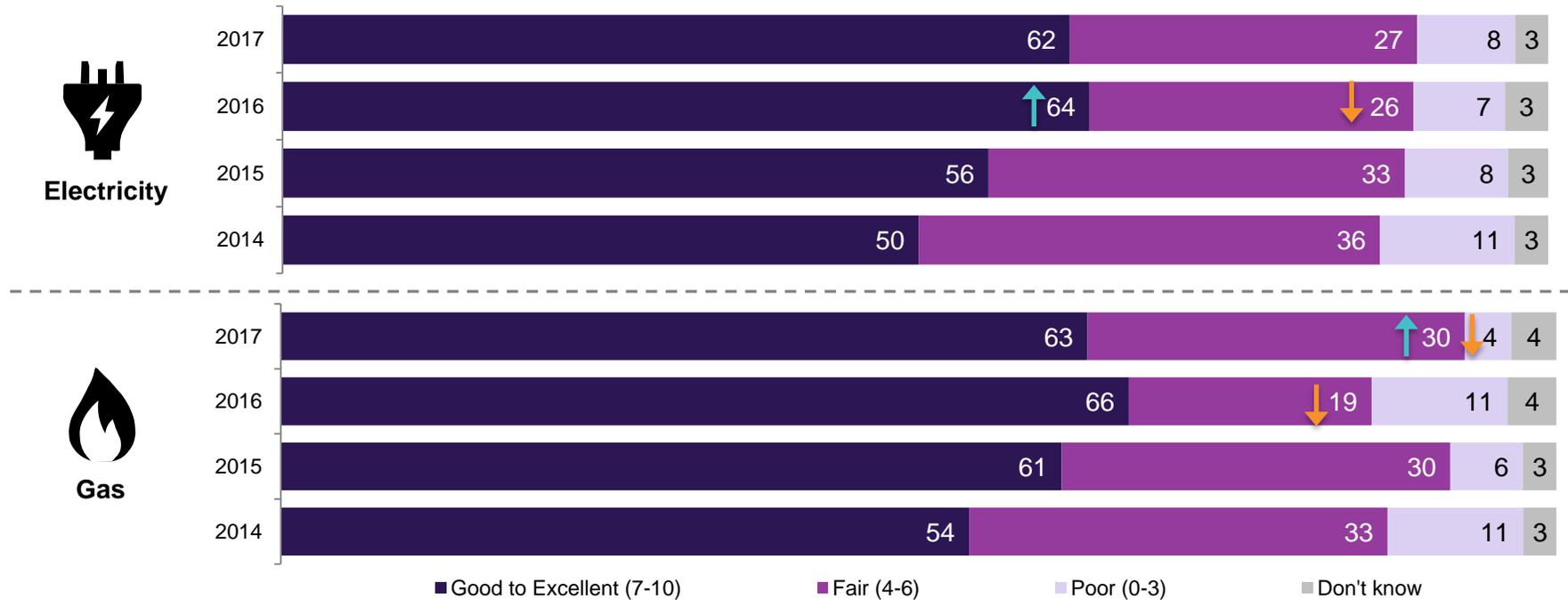
VALUE FOR MONEY PERCEPTIONS

RESIDENTIAL CONSUMERS

Perceptions of value for money provided by electricity companies in NSW have remained above the benchmark year, with 62% of residential consumers rating the value for money they receive highly at 7 or more out of 10 (vs. 50% in 2014).

Among residential gas customers, low value ratings of between 0 and 3 fell to their lowest levels over the four years of the study, to just 4%.

Rating of overall *value for money* provided by electricity and / or gas company (%)



Base: NSW residential participants (n=400) or those with mains gas (n=201).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.



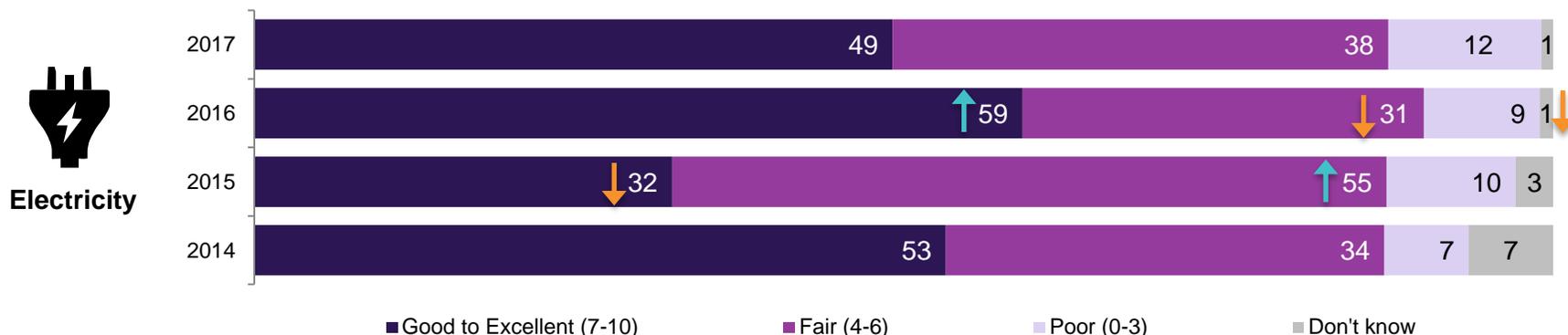
VALUE FOR MONEY PERCEPTIONS

SMALL BUSINESS CONSUMERS

Among small business electricity customers in NSW, ratings of the value for money they receive have remained higher than 2015 results when results dipped to just 32% providing high ratings of 7 or more out of 10, compared with 49% this year.

Small businesses were the happiest with the value for money from their gas companies since the survey began, with 67% providing a rating of 7 or more, compared with the low of 48% in 2016.

Rating of overall *value for money* provided by electricity and / or gas company (%)



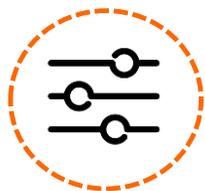
Base: NSW small business consumers (n=100) or those with mains gas (n=30).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

AUSTRALIAN CAPITAL TERRITORY



NEWGATE
RESEARCH



SUMMARY OF RESULTS (AUSTRALIAN CAPITAL TERRITORY)

Consumers from the Australian Capital Territory (ACT) exhibited many characteristics typical of those in smaller energy markets with limited choice.

Awareness of choice in energy providers or plans remained low relative to other jurisdictions – though awareness of choice in different plans with the same electricity retailer *increased* among small business consumers (up from 60% to 82%), reaching parity with the NEM average. Dissatisfaction with the level of choice available remained steady; when probed, more than half of residential consumers (54%) and two-fifths of small business consumers (43%) felt they didn't have enough choice.

Rates of approaches by energy companies decreased sharply over the past year, down from 26% to 14% for residential consumers and from 36% to 6% for small business consumers. Meanwhile, rates of self-led investigation of energy options and rates of switching energy provider or plan both remained stable. When asked about future switching intentions, over half of residential consumers (nett 55%) while just one in six small business consumers in the ACT (nett 16%) said they were interested in exploring better energy deals.

Consumers' level of confidence in being able to find the right information in choosing a suitable energy deal remained unchanged. General internet searching was again the top source of information used by those who had made a switch or investigated options in the past 12 months, as well as the preferred information source among those who had not investigated at all.

Of particular note is the fact that price comparison websites became the second-most used information source among those who had recently investigated or switched, rising sharply from 5% to 23% - led in part by a rise in awareness of the independent comparator website energymadeeasy (with nett prompted and unprompted recall up from 3% to 9%).

Satisfaction ratings remained largely unchanged for energy companies, customer service and value-for-money, though perceptions of customer service improved among small business electricity consumers, with ratings of 7 or more out of 10 rising from 64% to 84%. Further, value for money ratings have also increased among this group over the past four years with ratings of 7 or more rising from 42% in 2014 to 65% in the latest survey. business electricity consumers, with ratings of 7 or more out of 10 rising from 64% to 84%.



Investigated offers
in past 12 months



Switched energy
company or plan
in the past 12 months

24% ...in the past 5 years



Satisfaction with energy
company (% very / somewhat)



67%



68%



Customer service
(% rating 7-10 out of 10)

68%

69%



Value for money received
(% rating 7-10 out of 10)

56%↑
2015

53%



Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (AUSTRALIAN CAPITAL TERRITORY)

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 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 in the page footer 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.

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.

Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

Sample sizes: ACT (n=)	2014	2015	2016	2017
Residential				
All participants	152	200	200	200
Mains connected gas participants	-	126	131	137
Small Business				
All participants	47	50	50	49
Mains connected gas participants	-	11	11	12



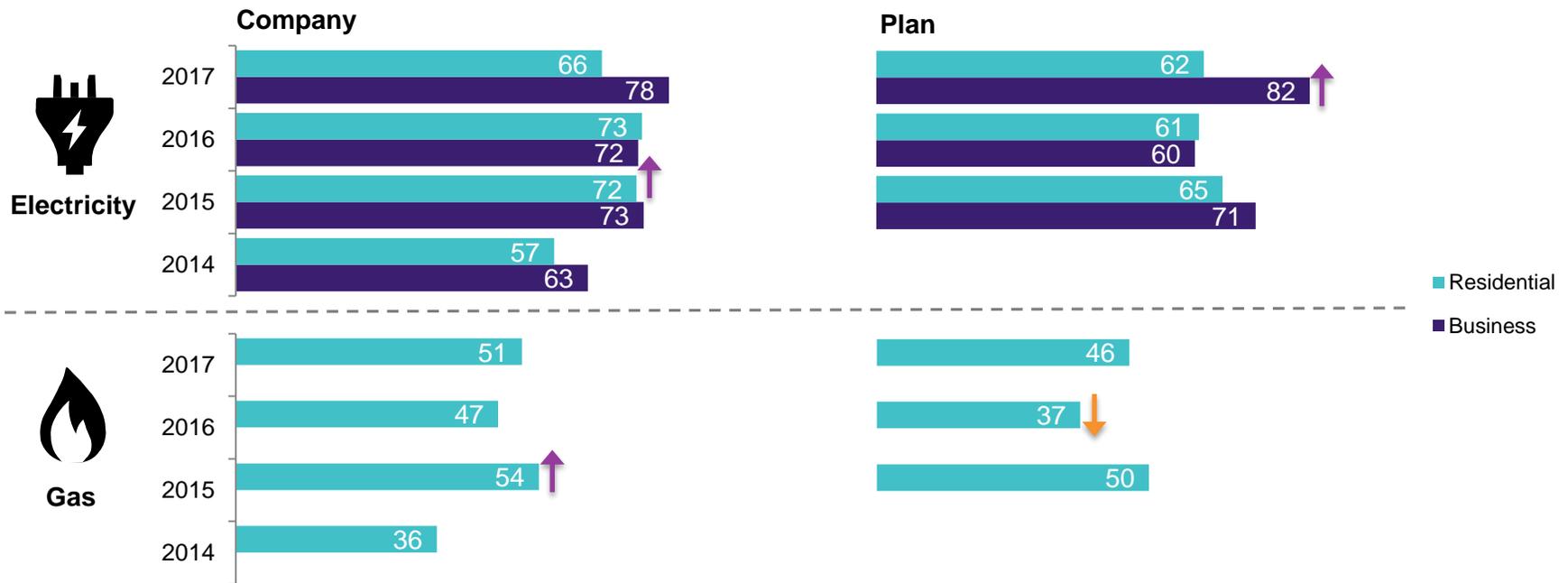
AWARENESS OF ABILITY TO CHOOSE

Awareness of choice in the energy market remained has relatively low among residential consumers in the ACT.

Around two in three residential ACT consumers believe it is possible to choose between different electricity providers (66%) or plans (62%), while around one in two thought there was choice in gas provider (51%) or plan (46%).

Among small business consumers, awareness of choice in electricity companies remained fairly stable at 78%, though awareness of choice between electricity *plans* increased to comparable levels with other jurisdictions (to 82%, up from 60% in 2016).

Awareness of ability to choose energy company or plan (% True)



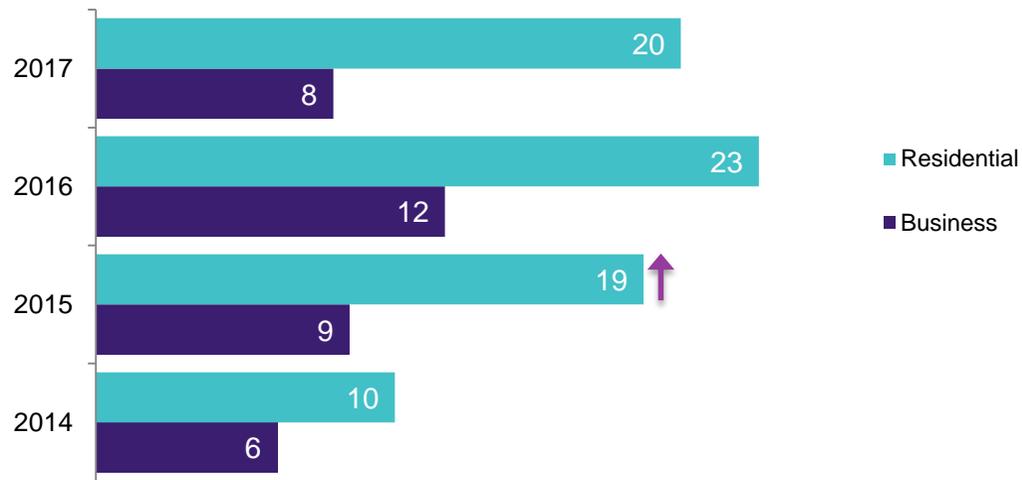
Base: ACT participants (residential n=200, small business n=49) or those with mains gas (residential n=137). Due to low base sizes, gas results for small business consumers have been omitted. Q13a. True or false: People in your area can choose their electricity company? / Q13b. True or false: People in your area can choose their gas company? / Q13c. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms? / Q13d. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms?



INVESTIGATING OFFERS

The proportion of ACT consumers who have investigated energy options in the past year has remained relatively stable over the last few years, at 20% of residential consumers and 8% of small business consumers.

Actively investigated offers or options in the past 12 months (% Yes)



Base: ACT participants (residential n=200, small business n=49).

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

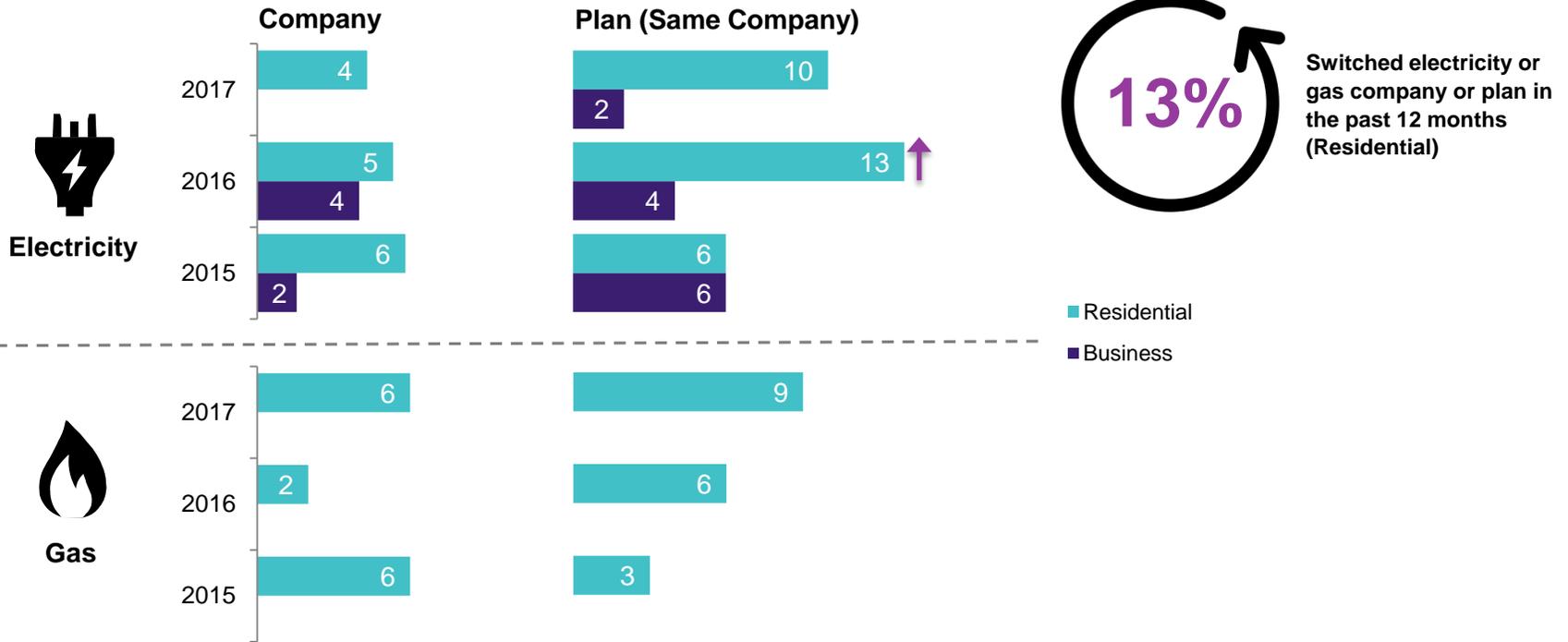


RATES OF SWITCHING COMPANY OR PLAN

Rates of switching between energy providers and plans remained low in the ACT, relative to other jurisdictions.

While sample sizes are small, there are indications that residential rates of switching between gas plans has increased steadily, while small business rates of switching between electricity plans has been falling.

Switched in the past 12 months (% At least once)



Base: ACT participants (residential n=200, small business n=49) or those with mains gas (residential n=137). Due to low base sizes, gas results for small business consumers have been omitted.

Q17. In the past 12 months, how many times have you changed the following? (not asked in 2014)

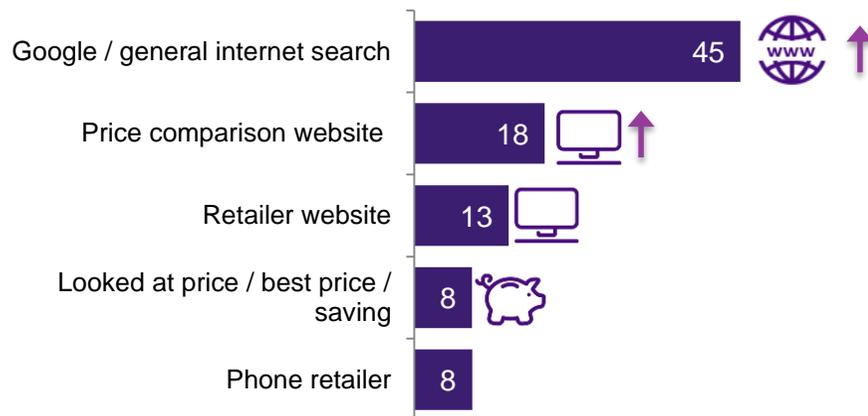


INFORMATION SOURCES USED TO SWITCH

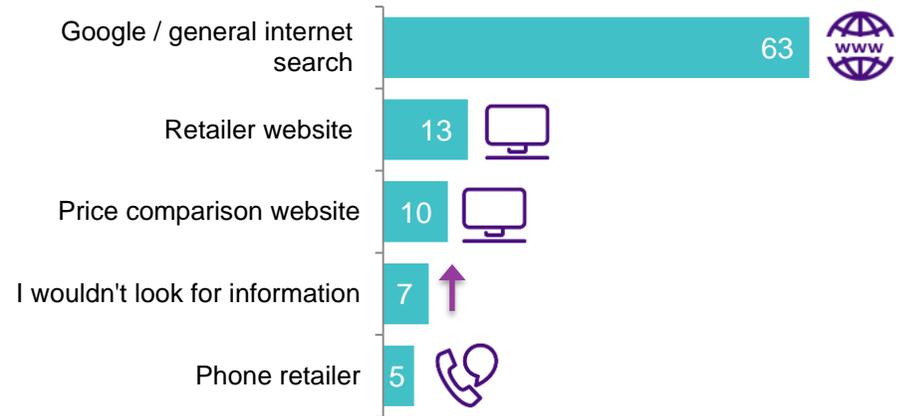
Internet searches remained the most common information source among residential consumers who had investigated energy offers in the past year (45%). Consumers who had not investigated switching also cited this as the main way they would find information if they wanted to (63%).

The use of price comparison websites increased sharply among those who had investigated or made a switch, up from 4% in 2016 to 18% - echoing increases in NSW and Victoria. This accompanied an increase in awareness of the independent government comparison site Energymadeeasy, both unprompted (from 0% to 2%) and prompted (from 3% to 9%). Indeed, the ACT was the only jurisdiction to record an increase in awareness of the website.

Top 5 information sources used by those who *switched or investigated offers* (%)



Top 5 sources those who *had not investigated or switched would use if they did want information* (%)



Prompted + unprompted *awareness of independent government comparator website:*

9% ↑ Energymadeeasy

Base: ACT residential participants who switched energy company or plan in the past 5 years or who had investigated options in the last 12 months (n=67). / Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? / You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?

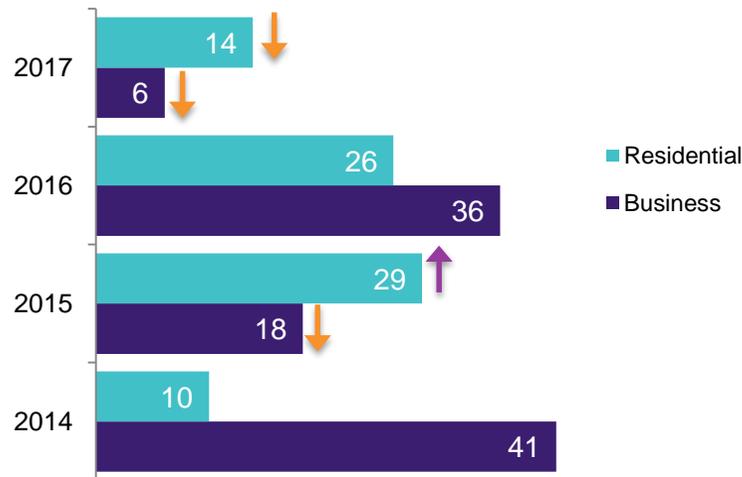
Base: ACT residential participants who had not switched energy company or plan in the past 5 years or investigated options in the last 12 months (n=133). / Q37. If you wanted to look for information about different energy retailers or plans, what would be your most preferred method or source of information? / Q40. Have you heard of the independent government comparator websites ...?



APPROACHED BY AN ENERGY COMPANY

There were significant decreases in the proportion of ACT consumers approached by an energy company in the last 12 months, from 26% to 14% for residential consumers and 36% to 6% for small business consumers.

Approached by an energy company in the past 12 months (% Yes)



Top Methods of Approach (2017)

Residents who were approached



52% letters in the mail



35% brochures/flyers in the mail

Base: ACT participants (residential n=200, small business n=49). / Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?
Base: Participants who had been approached by an energy company in the past 12 months (residential n=29). / Q18B. In what ways were you approached by an energy company? Due to low base sizes, gas results for small business consumers have been omitted.



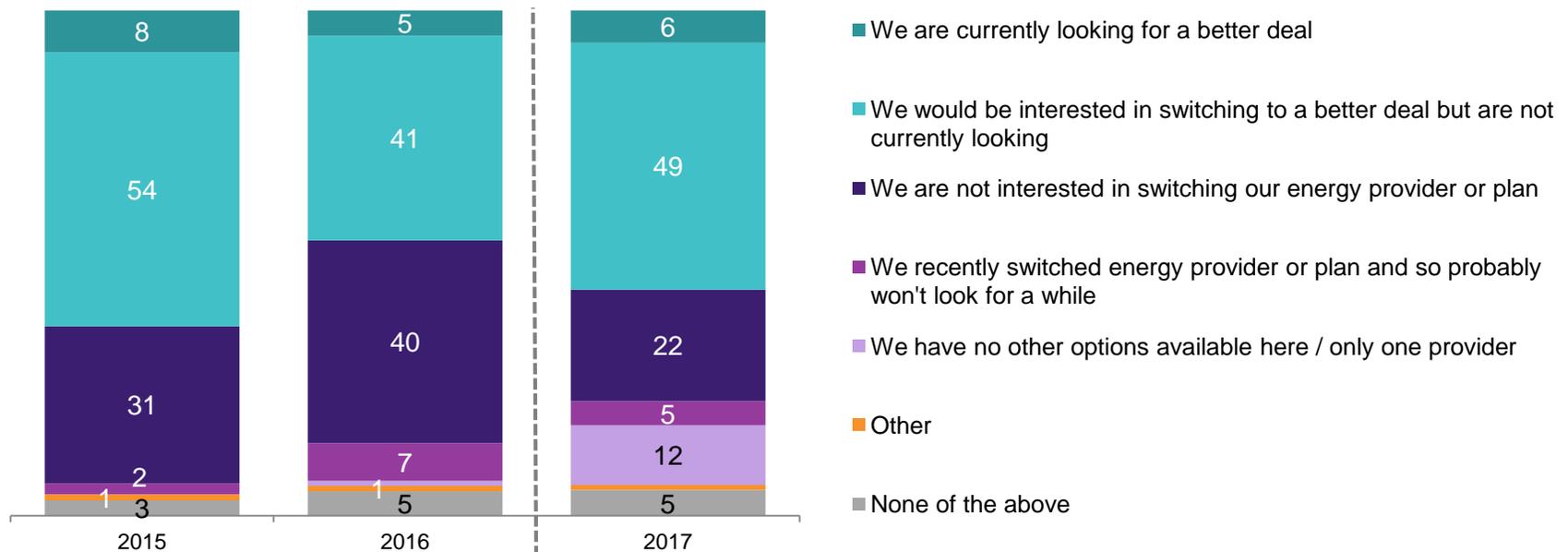
INTENTION TO SWITCH IN THE FUTURE

Over half of all residents surveyed were interested in switching to a better deal (nett 55%) – however, only 6% were actively looking at the time.

Meanwhile, only around one in six small business consumers said they were interested in switching (nett 16%), including 2% who were actively looking.

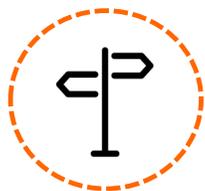
More than one in ten residential consumers (12%) said they had no other options available, while one in five small business consumers (20%) said the same. It is worth noting this is the first year this response option was included, whereas in previous years the result for “we have no other options” was derived from open-ended responses – consequently, comparisons over time should be made with caution.

Interest in *looking for a better deal* (%)



Base: ACT participants (residential n=200, small business n=49).

Q34. When it comes to your household's [business's] energy company, which one of the following statements is most applicable to your household [business]?



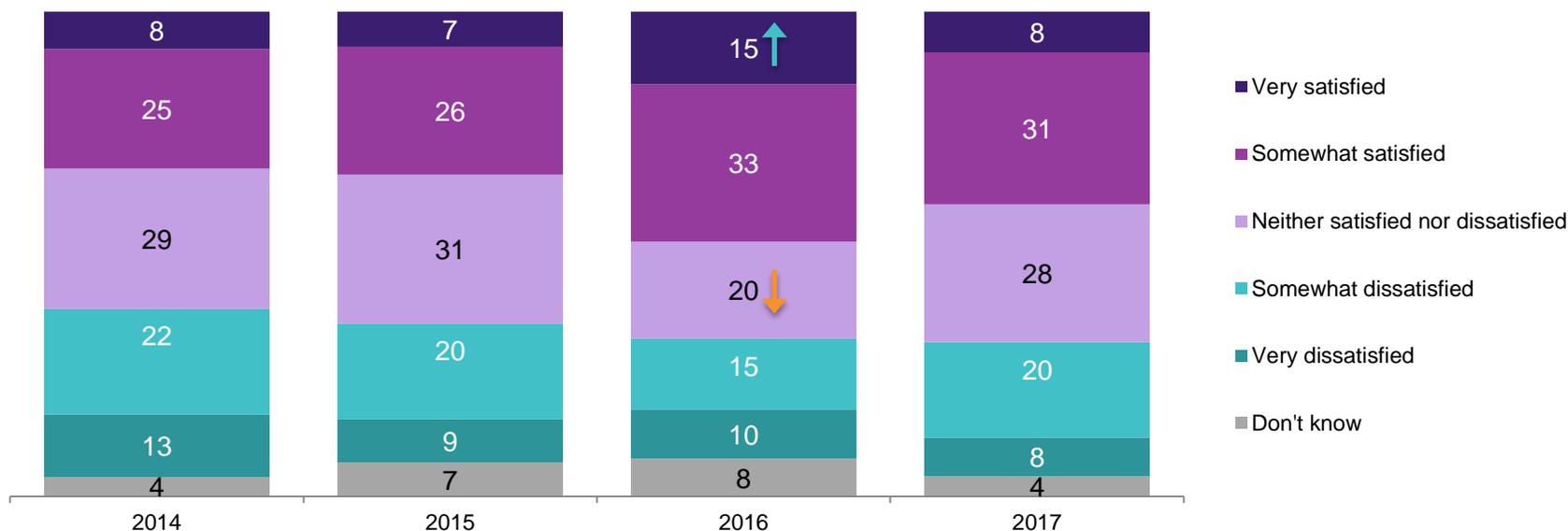
SATISFACTION WITH LEVEL OF CHOICE

Satisfaction with the level of choice in the ACT remained relatively stable year-on-year, with a nett 40% of residential consumers saying they were very or somewhat satisfied (compared to a nett of 47% in 2016).

Meanwhile, one in two small business consumers said they were satisfied with the level of choice (53%), consistent with last year's result (48%).

When probed, more than half of residential ACT consumers (54%) said they didn't have enough choice, while 3% felt they had too much choice. Among small business consumers, 43% said they didn't have enough choice and no small business participants felt there was *too much* choice.

Satisfaction with the *level of choice* available (%)



Base: ACT residential participants (n=200).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?



CONFIDENCE IN FINDING INFORMATION

Confidence in being able to find the right information about energy plans and deals has stabilised since rising sharply in 2016, with 56% of residential consumers rating their confidence as 7 or more out of 10.

Among small business consumers, 71% felt highly confident in their ability to find the right information, giving a rating of 7 or more out of 10, compared to 56% in 2016 (though the difference is not statistically significant, likely as a result of relatively small sample sizes).

Level of confidence in finding the right information to help choose a suitable energy plan or deal (%)



Base: ACT residential participants (n=200).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.



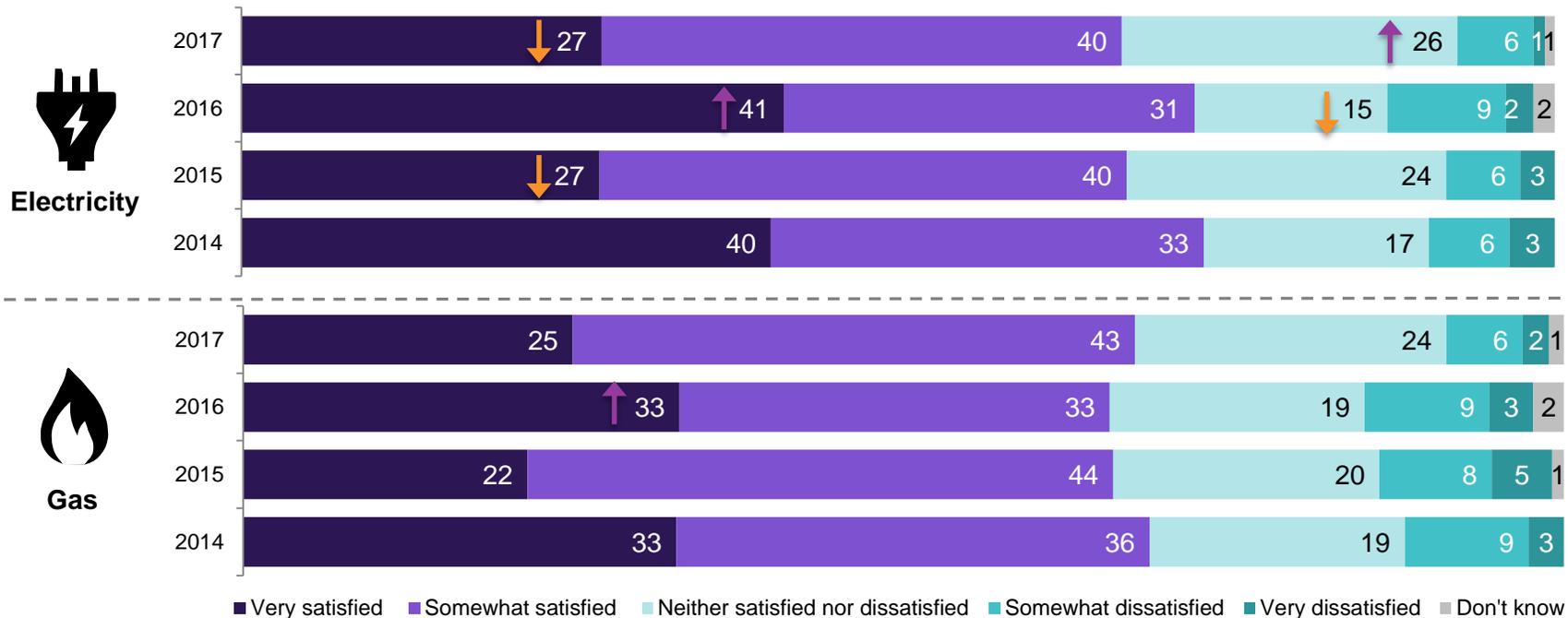
SATISFACTION WITH ENERGY COMPANIES

RESIDENTIAL CONSUMERS

Residential satisfaction with electricity companies has remained relatively consistent despite fluctuation in the proportion of consumers who were very satisfied – with a nett 67% of consumers being very or somewhat satisfied (compared to 73% in 2016).

Nett satisfaction (very / somewhat satisfied) among residential gas consumers has also remained steady over time.

Satisfaction with electricity and gas company (%)



Base: ACT residential participants (n=200) or those with mains gas (n=137).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?

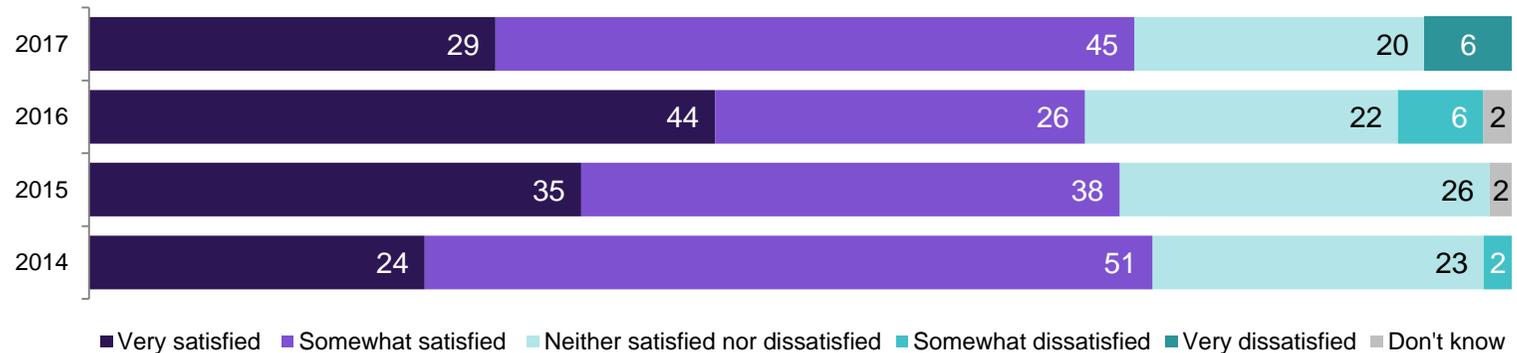


SATISFACTION WITH ENERGY COMPANIES

SMALL BUSINESS CONSUMERS

Similar to residential consumers, net satisfaction among small business consumers in the ACT has remained relatively stable over the past four years, at 73% for electricity companies.

Satisfaction with electricity company (%)



Base: ACT small business participants (n=49). Due to low base sizes, gas results for small business consumers have been omitted.

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?



QUALITY OF CUSTOMER SERVICE

RESIDENTIAL CONSUMERS

Ratings of customer service have remained stable among residential consumers in the ACT, with 68% providing ratings of 7 or more out of 10 for both electricity and gas providers this year.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: ACT residential participants (n=200) or those with mains gas (n=137).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.



QUALITY OF CUSTOMER SERVICE

SMALL BUSINESS CONSUMERS

High customer service ratings of 7 or more increased significantly among small business owners, up from 64% in 2016 to 84% this year.

Rating of overall *quality of customer service* provided by electricity company (%)



Base: ACT small business participants (n=49). Due to low base sizes, gas results for small business consumers have been omitted.

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? 10 = excellent, 0 = very poor.

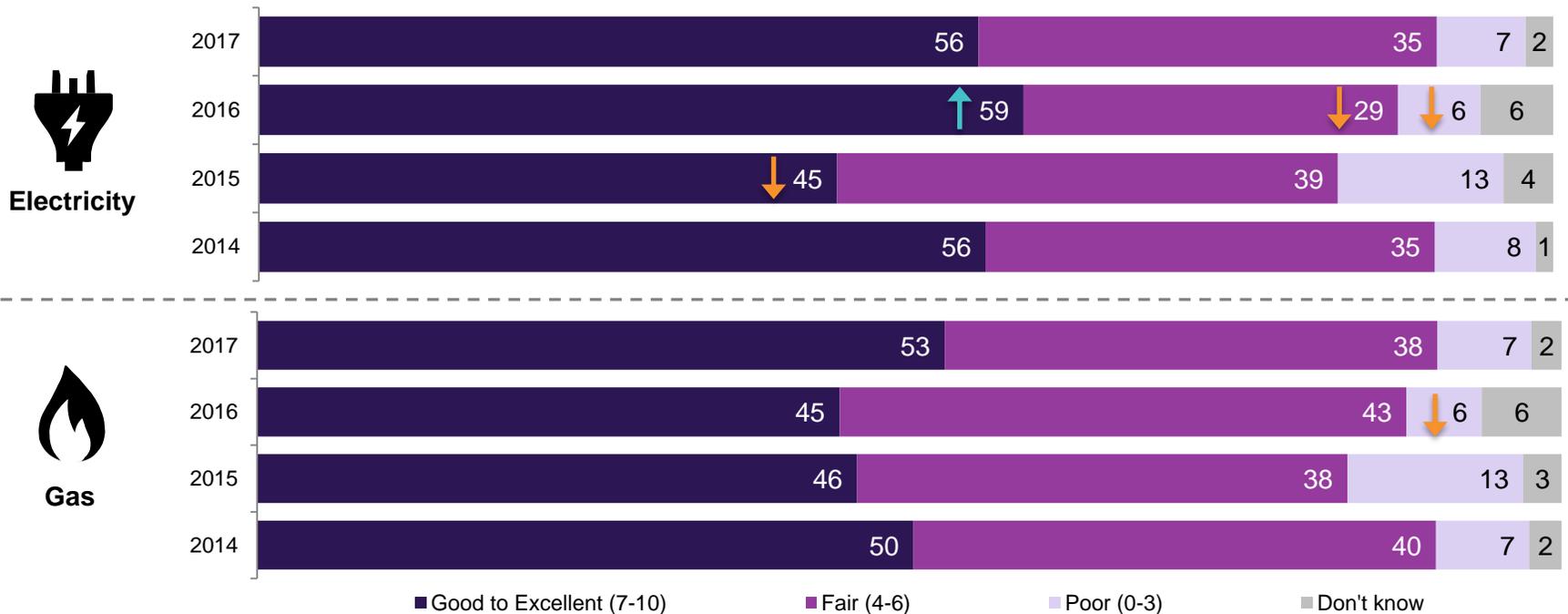


VALUE FOR MONEY PERCEPTIONS

RESIDENTIAL CONSUMERS

Higher ratings of value for money from electricity companies have remained relatively steady year-on-year, with 56% of residential electricity consumers and 53% of residential gas consumers providing ratings of 7 or more out of 10 in 2017.

Rating of overall *value for money* provided by electricity and / or gas company (%)



Base: ACT residential participants (n=200) or those with mains gas (n=137).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

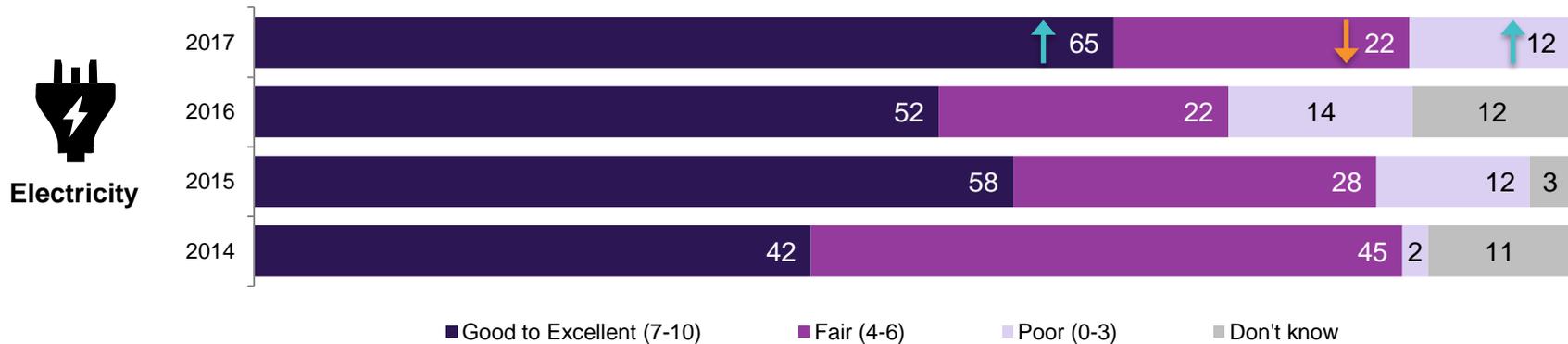


VALUE FOR MONEY PERCEPTIONS

SMALL BUSINESS CONSUMERS

Ratings of value for money have increased significantly among small business electricity consumers since 2014, with 65% providing ratings of 7 or more out of 10 compared to just 42% in 2014.

Rating of overall *value for money* provided by electricity company (%)



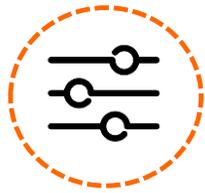
Base: ACT small business participants (n=49). Due to low base sizes, gas results for small business consumers have been omitted.

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company?
10 = excellent, 0 = very poor.

VICTORIA



NEWGATE
RESEARCH



SUMMARY OF RESULTS (VICTORIA)

Overall, the results among Victorian consumers have remained fairly steady in 2017, with very few significant differences in comparison with 2016 results.

The most notable difference this year was that the rates of switching *electricity* company in the past 12 months have significantly decreased among residential consumers (from 18% in 2016 to 10% this year).

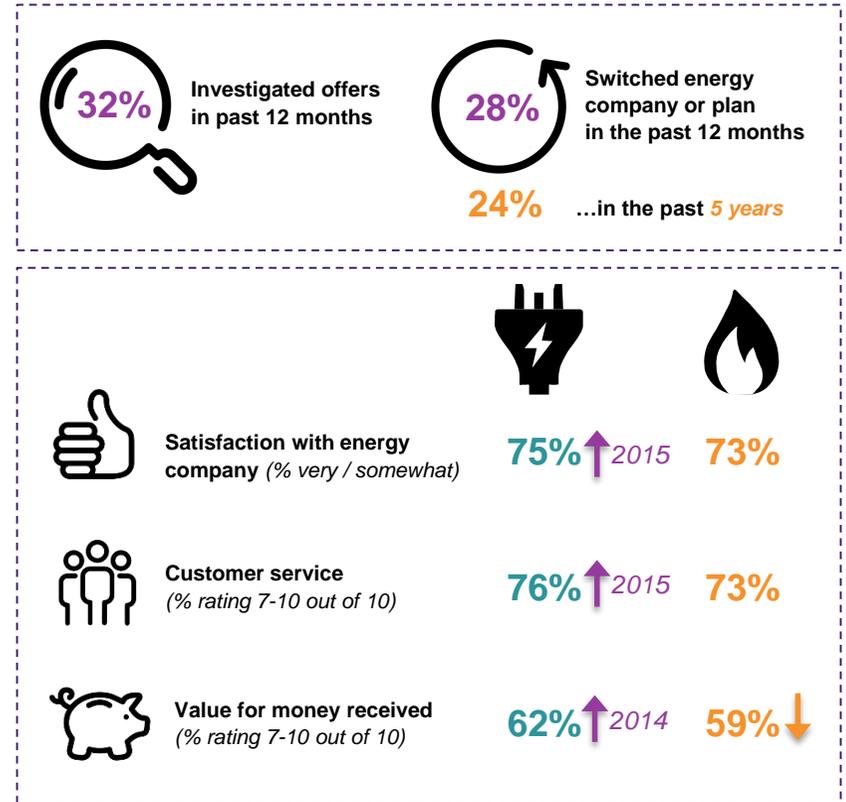
Quality of customer service ratings for electricity companies have been steadily increasing over the past four years among residential consumers, rising significantly from 64% giving a rating of 7 or more in 2014, to 76% in 2017. Indeed, being happy with their current company is a key reason why consumers reported not switching or looking into doing so.

Value for money ratings for electricity companies remained steady this year, however this declined significantly for gas companies (from 66% giving a rating of 7 or more in 2016 to just 59% this year), possibly reflecting recent gas price rises.

Most Victorian consumers remain aware that they could choose their energy company (97% for electricity companies, 95% for gas) or different energy plans (90% for electricity plans, 85% for gas plans).

Approaches from energy companies have remained consistent, with around half of Victorian consumers surveyed having been approached by an energy company in the past 12 months (49%). The research shows that proactive approaches from energy companies has been successful in prompting consumers to switch, where 38% of those who were approached by an energy company had switched in the past 12 months compared with just 18% of those who had not been approached.

Interest in changing to a better deal remains high for over half of all residential consumers (53%), however few were currently looking (13%).



↑↓ Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (VICTORIA)

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 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 in the page footer 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.

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.

Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

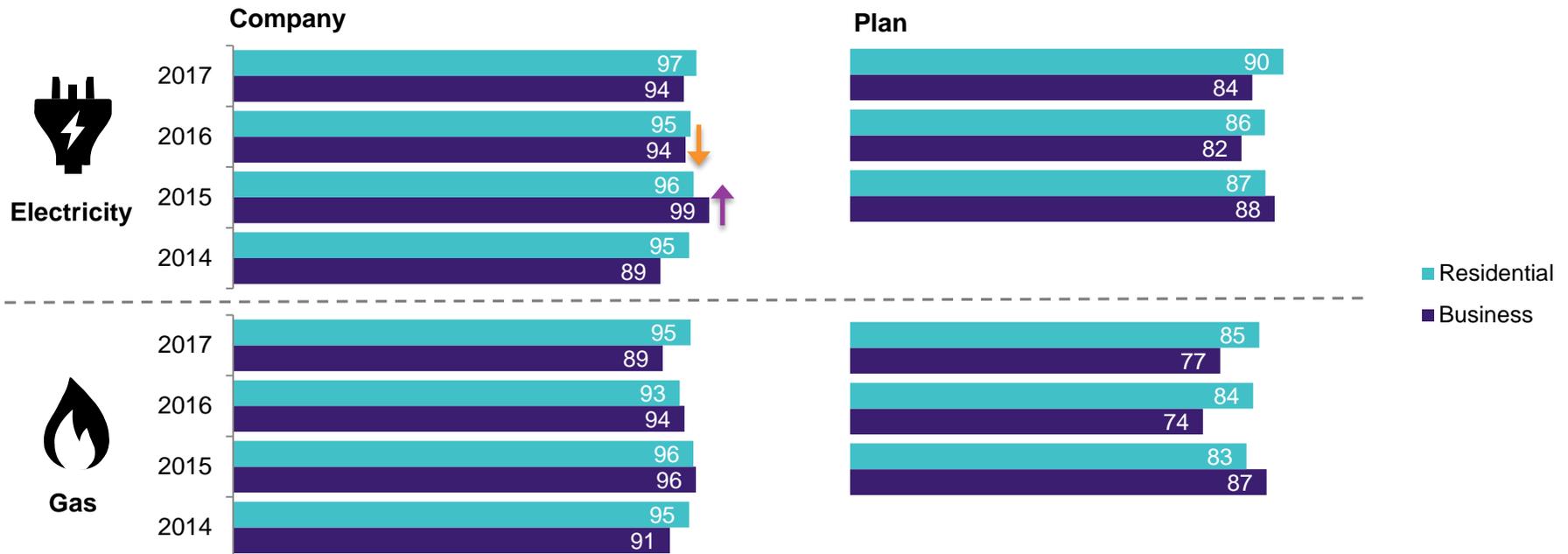
Sample sizes: Victoria (n=)	2014	2015	2016	2017
Residential				
All participants	327	403	478	400
Mains connected gas participants	266	329	352	309
Small Business				
All participants	76	100	101	100
Mains connected gas participants	47	39	34	56



AWARENESS OF ABILITY TO CHOOSE

Nearly all Victorian consumers (97%) understand that they have the ability to choose their energy company, and consistent with previous years, most also thought consumers could choose their plan (90%). Results were fairly consistent among small business consumers.

Awareness of ability to choose energy company or plan (% True)



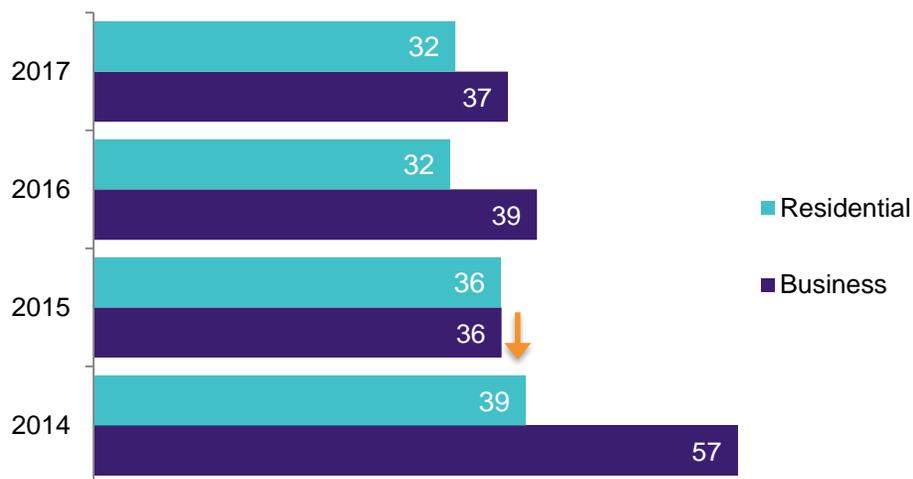
Base: VIC participants (residential n=400, small business n=100) or those with mains gas (residential n=309, small business n=56).

Q13a. True or false: People in your area can choose their electricity company? / Q13b. True or false: People in your area can choose their gas company? / Q13c. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms? / Q13d. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms?



INVESTIGATING OFFERS

Actively investigated offers or options in the past 12 months (% Yes)



The proportion of Victorian consumers who investigated energy options or offers in the last 12 months has stabilised this year (32% of residential consumers), following a declining (but not statistically significant) trend in the previous three years.

The main reason participants reported not investigating or switching was due to being happy with their current arrangements or company, or their energy company having a better offer, at 32% of mentions.

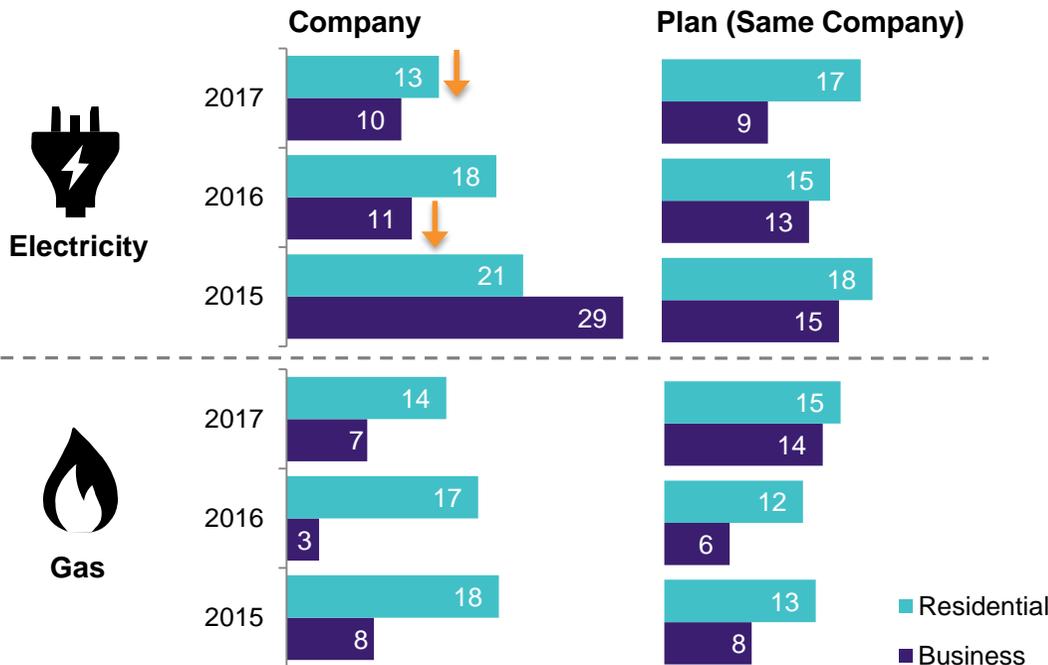
Base: VIC participants (residential n=400, small business n=100) or those with mains gas (residential n=309, small business n=56).

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



RATES OF SWITCHING COMPANY OR PLAN

Switched in the past 12 months (% At least once)



There has been a significant decline in electricity company switching rates among residential consumers in Victoria, from 21% in 2015 to 13% this year.

Switching rates for gas companies and for electricity and gas plans have remained fairly consistent over time, as have nett rates of switching energy company or plan; from 29% for residential consumers in 2015 to 28% this year. Among businesses, nett switching fell from 39% in 2015 and has remained steady since 2016, at 20% and 21% this year.

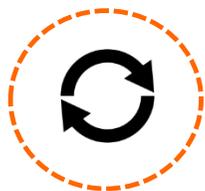
Those who were approached by an energy company were significantly more likely to have switched energy company or plan (38% vs. 18% of those who had not been directly approached), highlighting the success of proactive marketing efforts by energy retailers.



Switched electricity or gas company or plan in the past 12 months (Residential)

Base: VIC participants (residential n=400, small business n=100) or those with mains gas (residential n=309, small business n=56).

Q17. In the past 12 months, how many times have you changed the following? (not asked in 2014)

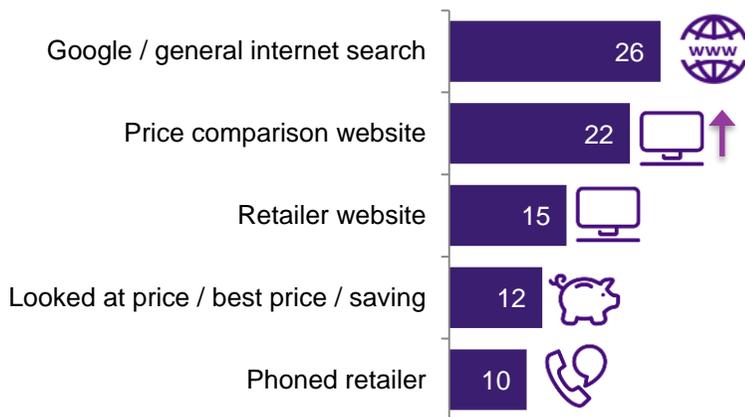


INFORMATION SOURCES USED TO INVESTIGATE

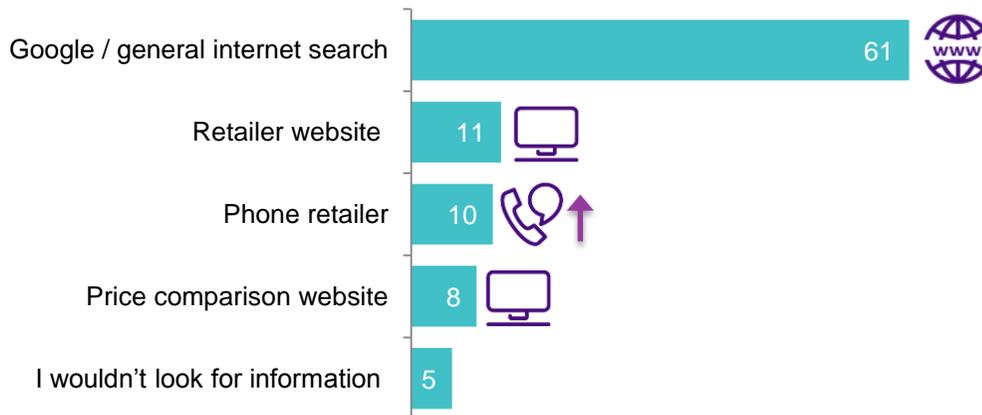
Internet searches and price comparison websites remained the two most preferred sources of information for switchers or investigators, and those who had not engaged with the energy market; having not switched or investigated. Notably, there has been a significant increase in the use of price comparison websites, with 22% of switchers or investigators citing their use (up from 15% in 2016).

Among Victorian consumers who hadn't investigated or switched, if they did want to find out about different energy retailers or plans, there has been an increase in preferences for phoning their retailer, from 4% in 2016 to 10% in 2017.

Top 5 information sources used by those who switched or investigated offers (%)



Top 5 sources those who had not investigated or switched would use if they did want information (%)



Prompted and unprompted awareness of independent government comparator websites:

26% Any independent comparator site **23%** Victorian Energy Compare
8% My Power Planner

Base: VIC residential participants who switched energy company or plan in the past 5 years or who had investigated options in the last 12 months (n=262). / Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? / You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?

Base: VIC residential participants who had not switched energy company or plan in the past 5 years or investigated options in the last 12 months (n=138). / 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? / Q40. Have you heard of the independent government comparator websites ...?

Arrows denote significant differences compared to 2016 at the 95% confidence level



APPROACHED BY AN ENERGY COMPANY

Half of Victorian residential consumers surveyed reported being approached by an energy company in the last 12 months (49%), with small business consumers experiencing slightly higher approach rates (55%). Of note is that approaches among small business consumers have declined significantly since 2015 (55% in 2017 down from 71%).

Approached by an energy company in the past 12 months (% Yes)



Top Methods of Approach (2017)

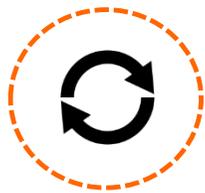


56% Residential
60% Business



44% Residential
35% Business

Base: VIC participants (residential n=400, small business n=100) or those with mains gas (residential n=309, small business n=56). / Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas? / Base: Participants who had been approached by an energy company in the past 12 months (residential n=197, small business n=55). / Q18B. In what ways were you approached by an energy company? Results shown are for telephone calls and door to door visits – among those approached.

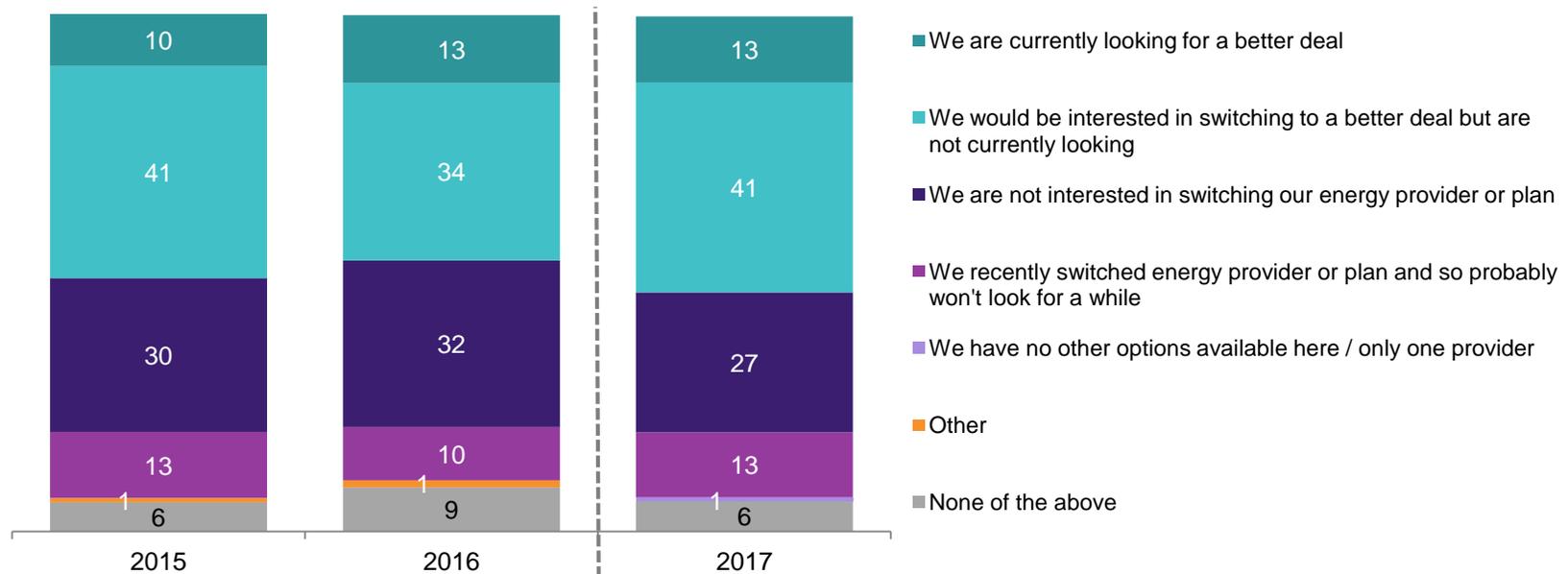


INTENTION TO SWITCH IN THE FUTURE

Over half of all residential consumers were interested in switching to a better deal (53%), with 13% currently looking.

Residential consumers who were dissatisfied with their energy company were much more likely to be currently looking for a better deal (42% of electricity and 35% of gas consumers vs. 8% and 9% of *satisfied* consumers respectively). This pattern was particularly prominent among small business consumers, with 89% of those dissatisfied with their electricity company showing an interest in switching compared with 51% of those who were satisfied.

Interest in *looking for a better deal* (%)



Base: VIC residential participants (n=400).

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

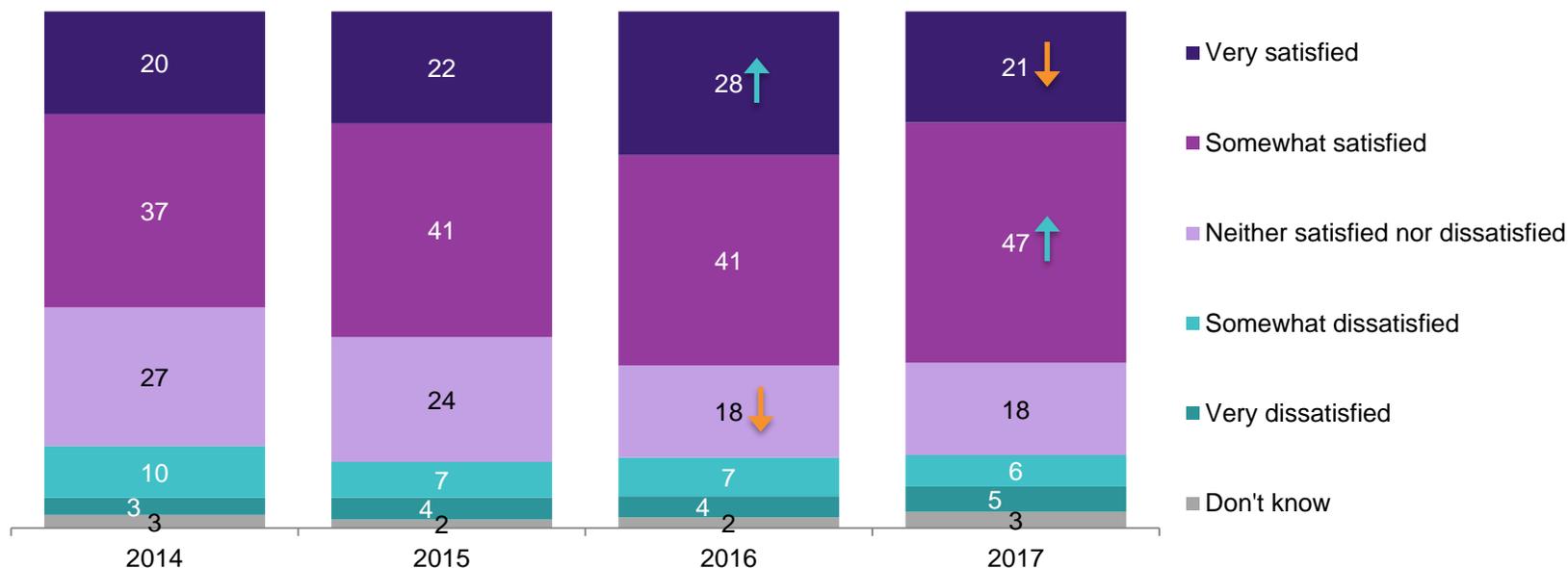


SATISFACTION WITH LEVEL OF CHOICE

In Victoria, satisfaction with the level of choice across both energy companies and plans remained high, with only 11% expressing dissatisfaction with the level of choice available to them. Further, satisfaction ratings have increased significantly over time (from 57% in 2014 to 68% in 2017).

Almost half of residential consumers said the level of choice was just right (48%), with 28% saying there was too much, and 13% saying too little. Results were very similar among small business consumers; 40% felt it was just the right amount, 29% said 'too much' and 18% felt there was not enough.

Satisfaction with the *level of choice* available (%)



Base: VIC residential participants (n=400).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?

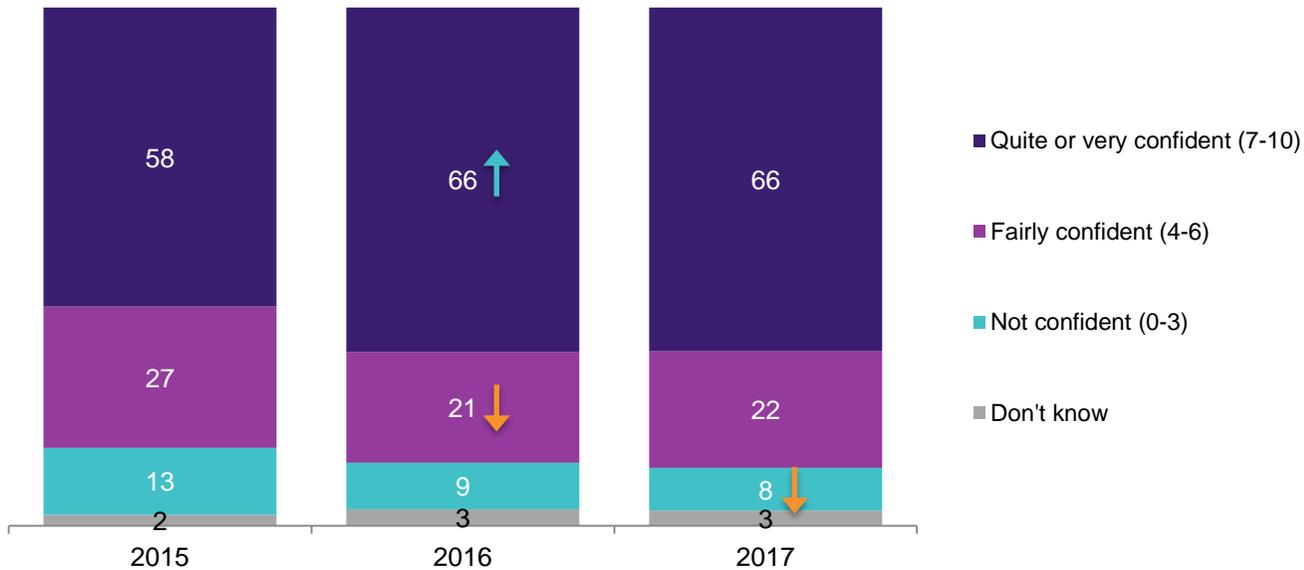


CONFIDENCE IN FINDING INFORMATION

Similar to previous years, the majority of residential consumers were highly confident in their ability to find the right information to choose a suitable energy plan or deal (66% rated their confidence at 7 or more out of 10).

Small business consumers were slightly less confident in finding the right information (62% rated their confidence as 7 or more).

Level of *confidence in finding the right information* to help choose a suitable energy plan or deal (%)



Base: VIC residential participants (n=400).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.

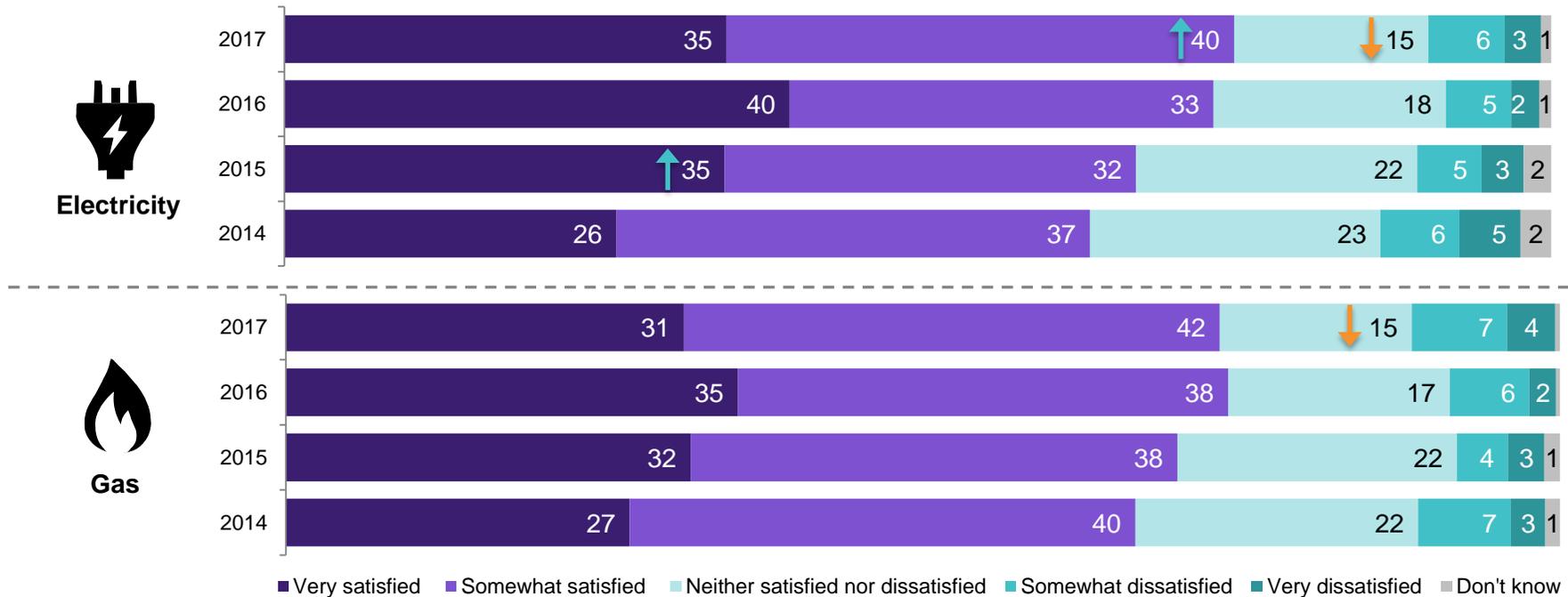


SATISFACTION WITH ENERGY COMPANIES

RESIDENTIAL CONSUMERS

Satisfaction with both electricity and gas companies has steadily increased among residential consumers over the past four years: 75% and 73% were somewhat or very satisfied respectively vs. 63% and 67% in 2014.

Satisfaction with electricity and gas company (%)



Base: VIC residential participants (n=400) or those with mains gas (n=309).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?

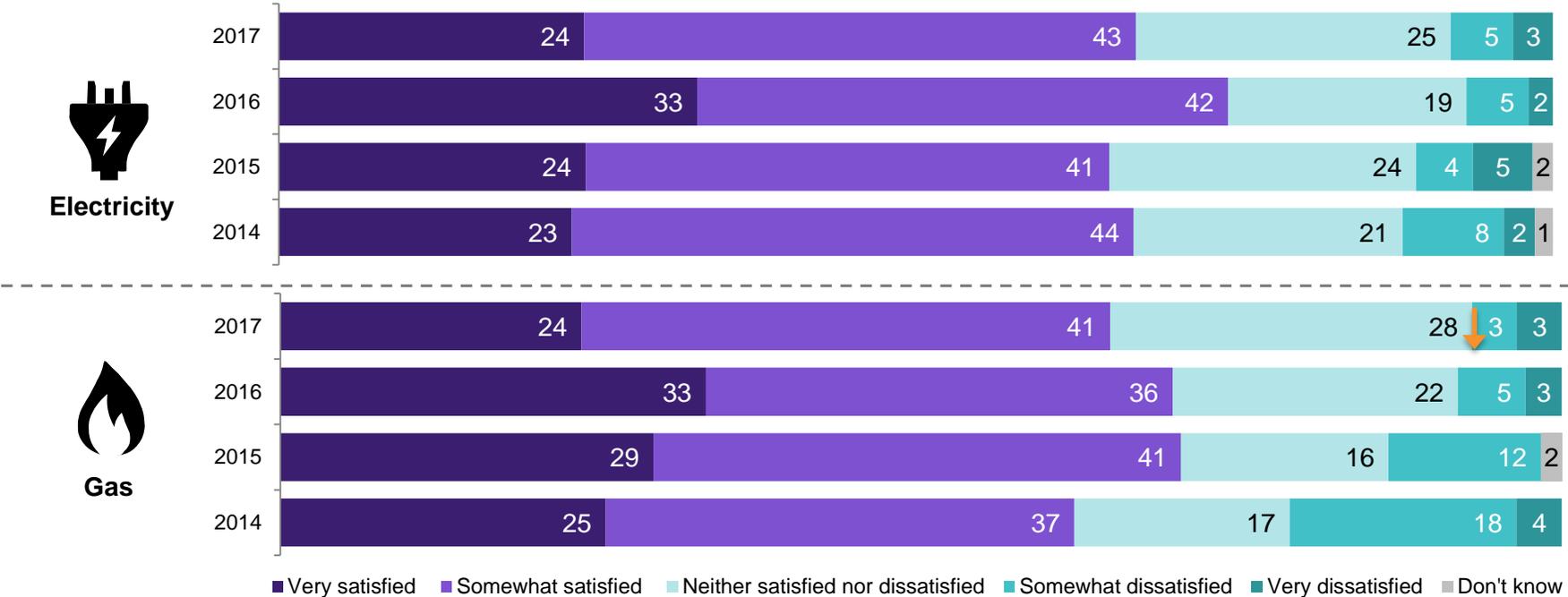


SATISFACTION WITH ENERGY COMPANIES

SMALL BUSINESS CONSUMERS

Small business consumers' satisfaction with their electricity and gas companies was typically lower than for residential consumers: 67% and 65% were somewhat or very satisfied in 2017 respectively. Furthermore, these results fell back to pre-2016 levels in 2017.

Satisfaction with electricity and gas company (%)



Base: VIC small business consumers (n=100) or those with mains gas (n=59).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?

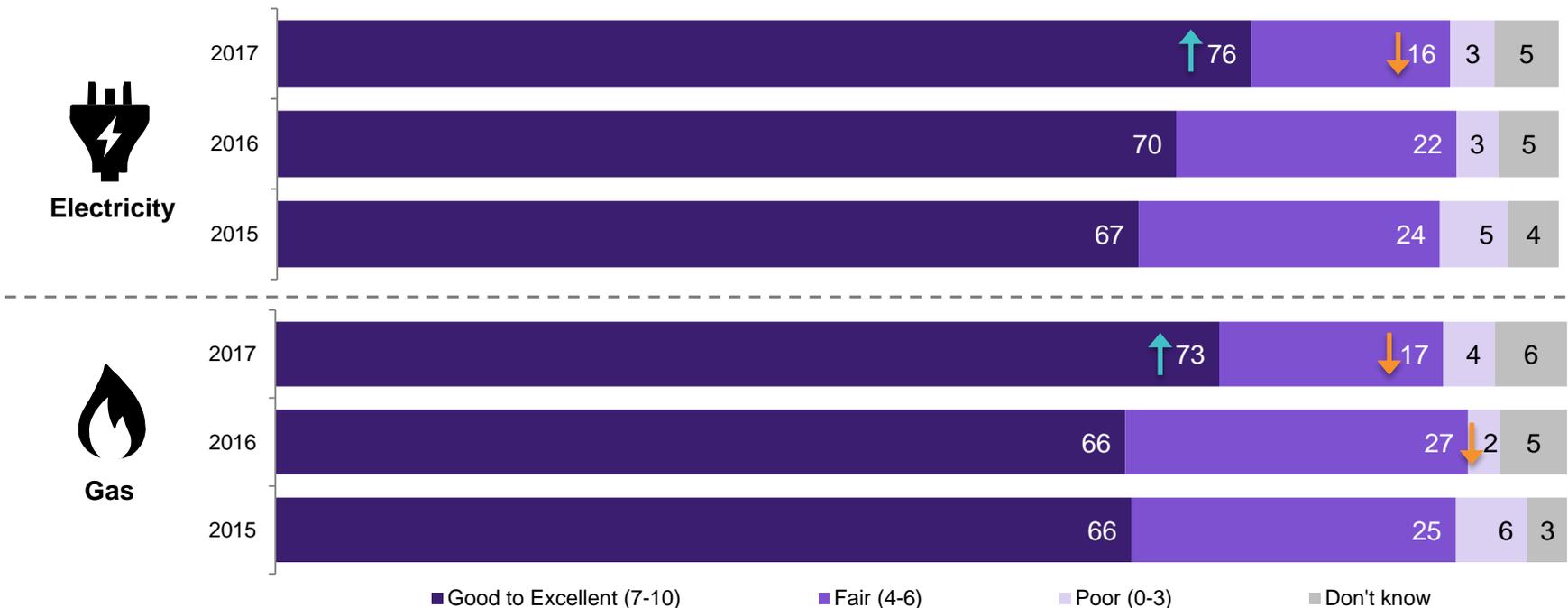


QUALITY OF CUSTOMER SERVICE

RESIDENTIAL CONSUMERS

Customer service ratings have shown a significant increase from 2014, with 76% of electricity and 73% of gas consumers rating it as good to excellent (7 or more out of 10) compared to just 64% and 62% in 2014 respectively.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: VIC residential participants (n=400) or those with mains gas (n=309).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.

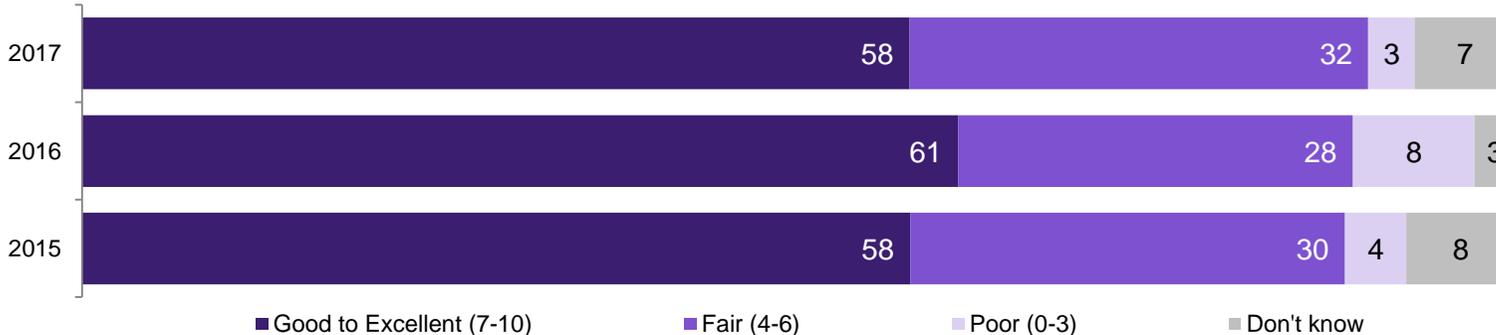
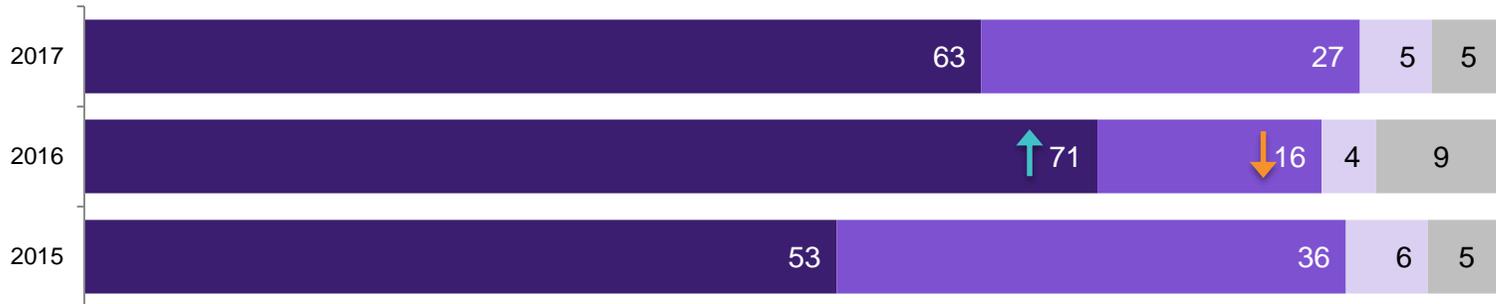


QUALITY OF CUSTOMER SERVICE

SMALL BUSINESS CONSUMERS

Customer service ratings for small business consumers were lower than for residential consumers, with 63% of electricity and 58% of gas consumers rating it as good to excellent (compared to 76% and 73% for residential consumers). Further, higher ratings of electricity company customer service have declined this year, from 71% giving a 7 or more out of 10 in 2016 to 63% this year.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: VIC small business consumers (n=100) or those with mains gas (n=59).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.

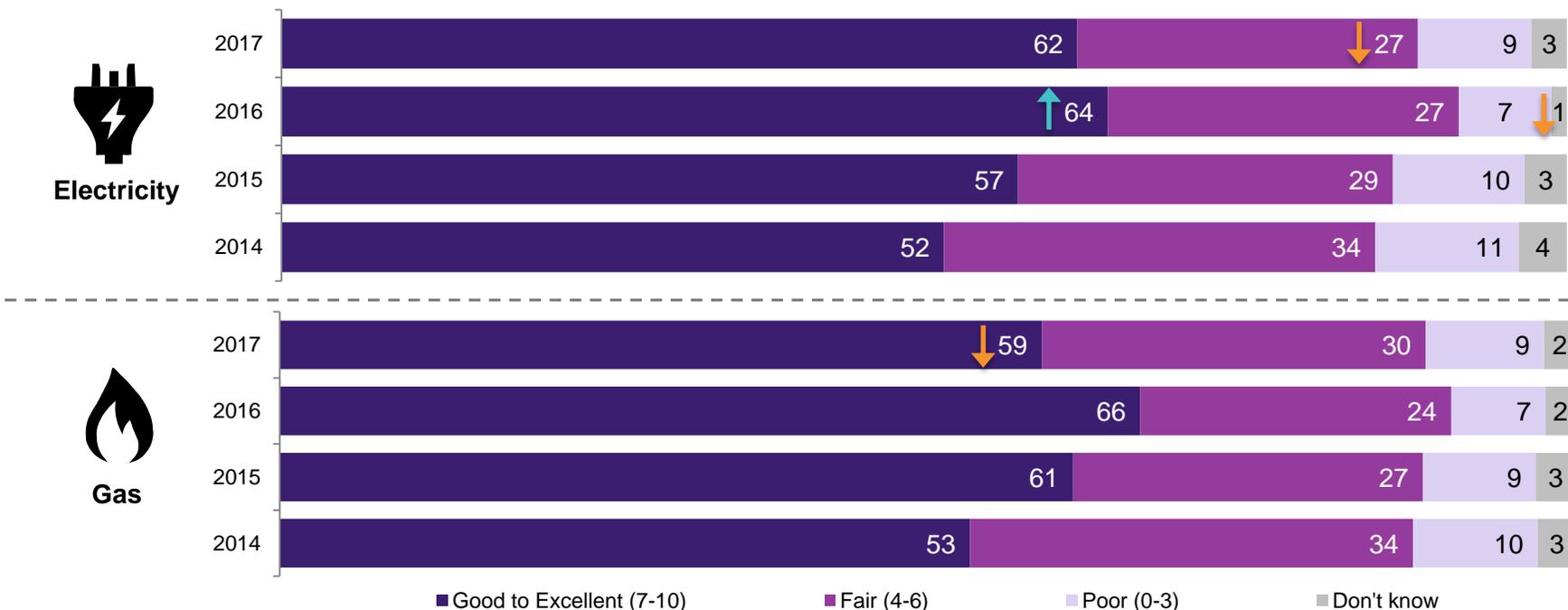


VALUE FOR MONEY PERCEPTIONS

RESIDENTIAL CONSUMERS

Residential consumer perceptions of value for money were stable for both electricity and gas. In 2017, 62% of electricity customers and 59% of gas customers rated their value for money as good to excellent (7 or more out of 10) compared with 2016 results of 64% and 66% respectively.

Rating of overall *value for money* provided by electricity and / or gas company (%)



Base: VIC residential participants (n=400) or those with mains gas (n=309).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

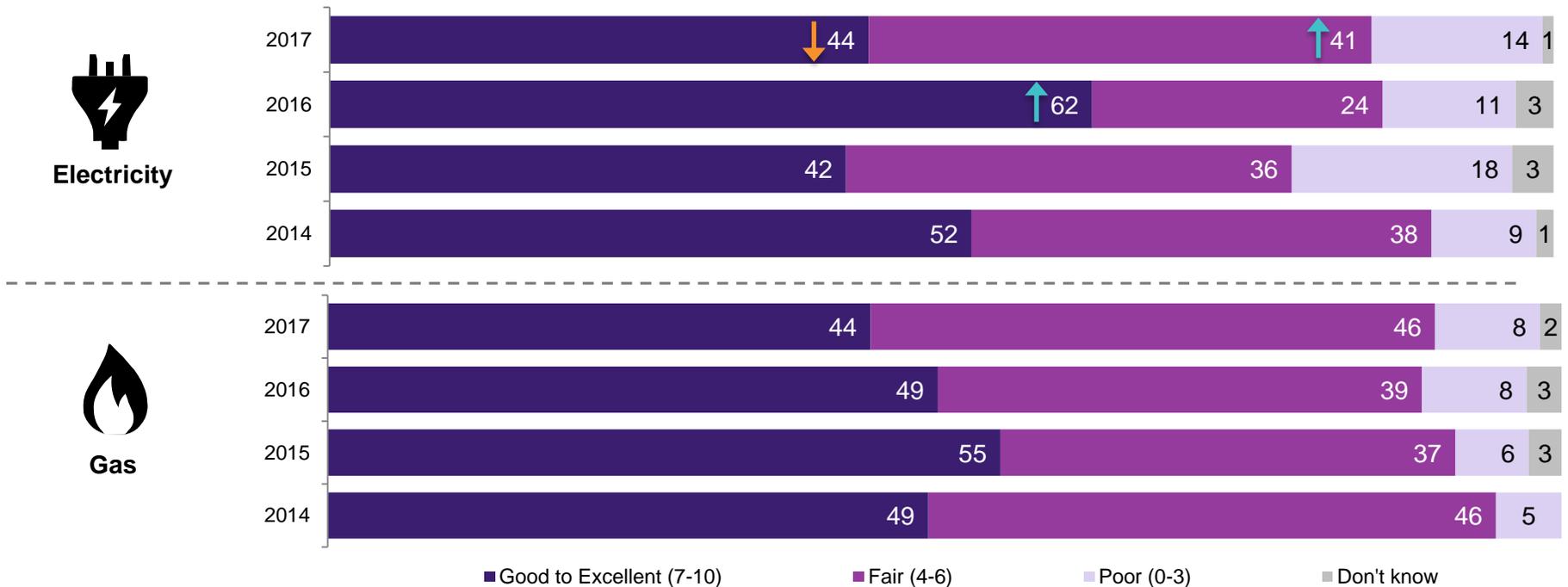


VALUE FOR MONEY PERCEPTIONS

SMALL BUSINESS CONSUMERS

Small business consumer perceptions of value for money have shown decreases since last year. In 2017, 44% of both electricity and gas consumers rated their value for money as good to excellent (7 or more out of 10) compared with 2016 results of 62% and 49% respectively.

Rating of overall *value for money* provided by electricity and / or gas company (%)



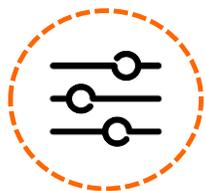
Base: VIC small business consumers (n=100) or those with mains gas (n=59).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

TASMANIA



NEWGATE
RESEARCH



SUMMARY OF RESULTS (TASMANIA)

Similar to regional Queensland, the limited options available in the Tasmanian energy market resulted in markedly different results compared with the rest of the National Electricity Market (NEM).

Consumer dissatisfaction with the level of choice in energy providers remained high (52% were dissatisfied), and the lack of options meant that hardly any consumers (2%) were currently looking for a better deal.

Interestingly though, consumer confidence in being able to find the right information to choose a suitable energy plan or deal has steadily increased over the past few years (in 2017 58% of residential consumers gave a rating of 7 or more out of 10 vs. 39% in 2015).

Among residential consumers, satisfaction levels and ratings of customer service and value for money remained fairly consistent this year. However among small business consumers ratings all improved significantly this year.



18%

Are satisfied with the level of choice
(% very or somewhat)



Satisfaction with energy company*
(% very / somewhat)



56%



Customer service*
(% rating 7-10 out of 10)

65%



Value for money received*
(% rating 7-10 out of 10)

42%

* Due to low base sizes, gas results are not shown.



Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (TASMANIA)

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Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

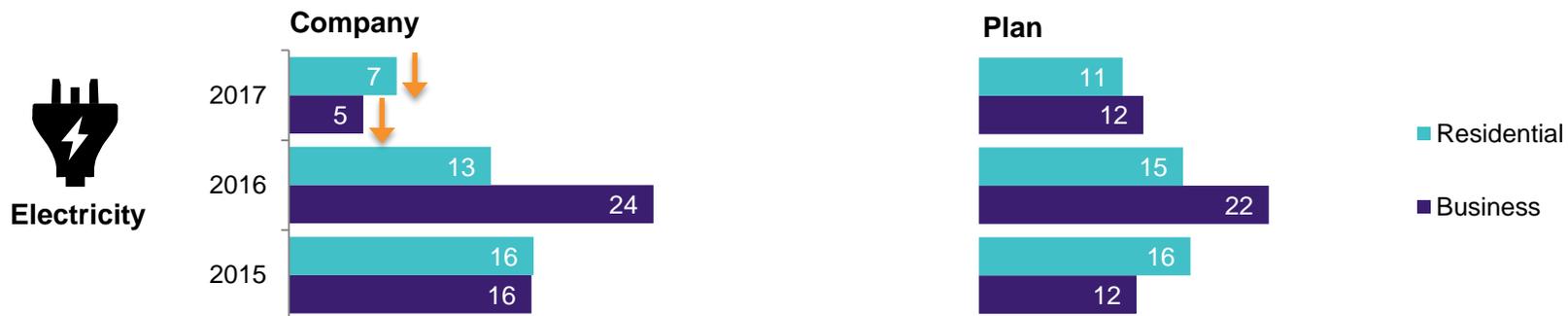
Sample sizes: Tasmania (n=)	2015	2016	2017
Residential			
All participants	200	200	200
Mains connected gas participants	19	24	14
Small Business			
All participants	50	51	50
Mains connected gas participants	1	2	0



PERCEIVED ABILITY TO CHOOSE

Given the limited options available in Tasmania, very few consumers thought they were able to choose between different electricity companies or plans – at 7% of residential consumers in 2017. Small business consumers were significantly less likely to say they were able to choose their electricity company (5%) compared to last year (24% in 2016). Of note is that there were significant decreases in the proportion of residential and business consumers who thought they could choose their electricity company in 2017.

Perceived ability to choose electricity company or plan (% True)



Base: TAS participants (residential n=200, small business n=50). Due to low base sizes, small business gas results have been omitted.

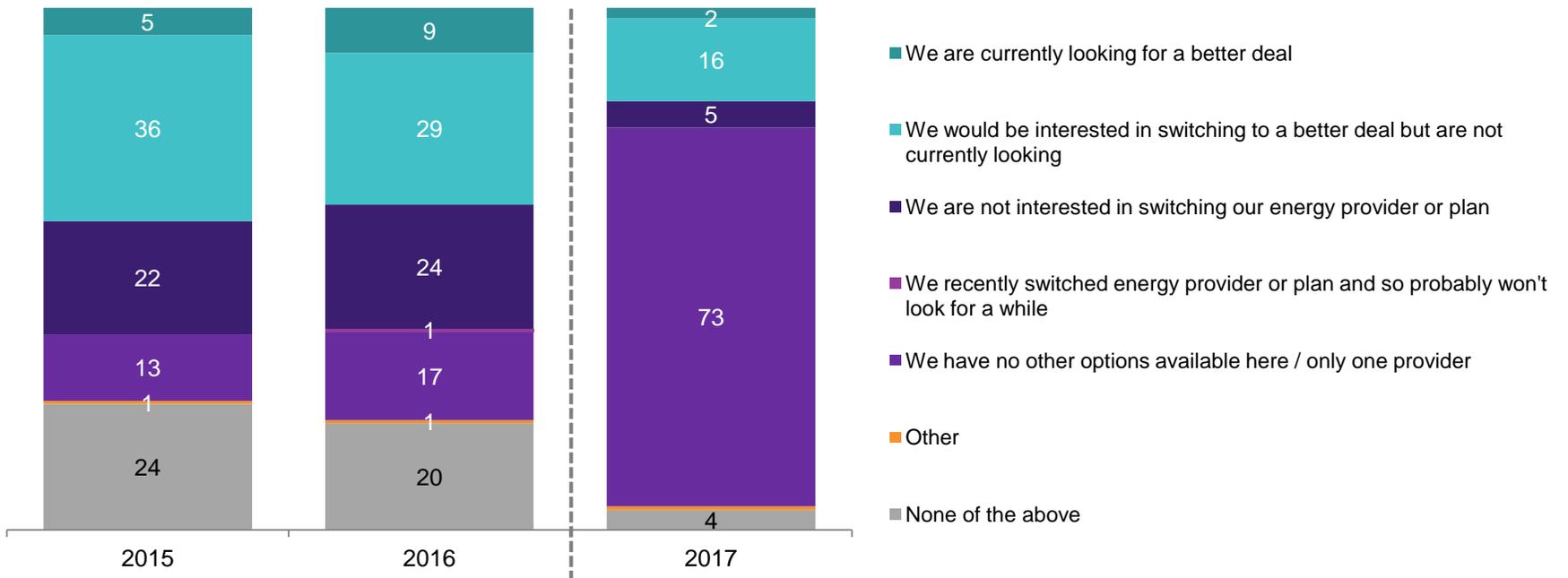
Q13a. True or false: People in your area can choose their electricity company? / Q13c. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms?



INTENTION TO SWITCH IN THE FUTURE

The vast majority of Tasmanian survey participants were not intending to switch because there were no other options available to them (73%) – noting that the change in the trend reflects a change in the response options in 2017.

Interest in *looking for a better deal* (%)



Base: TAS residential participants (n=200).

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

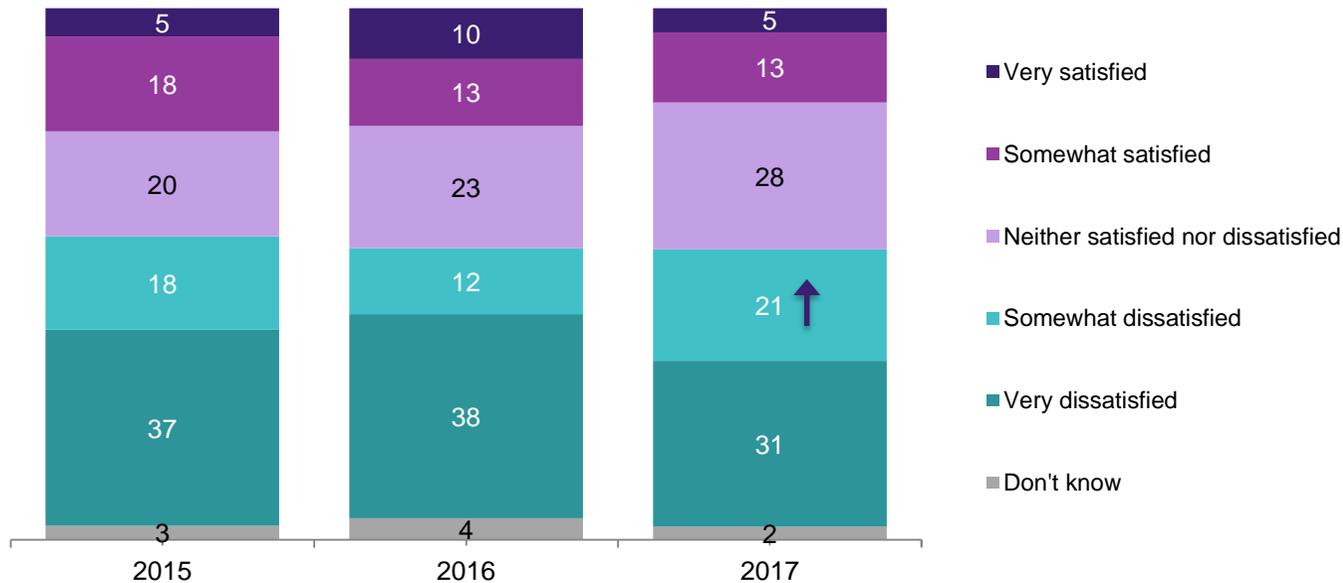


SATISFACTION WITH LEVEL OF CHOICE

Dissatisfaction with the level of choice remained quite high, with over half of Tasmanian residential consumers unhappy with the level of choice available to them (52%). A similar proportion of business consumers were also dissatisfied (45%).

The majority of residential consumers said there was not enough choice (86%), with 1% saying there was too much, and 9% saying there was just the right amount. Results were very similar among small business consumers (90% not enough, 9% just the right amount, 90% too much).

Satisfaction with the *level of choice* available (%)



Base: TAS residential participants (n=200).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?

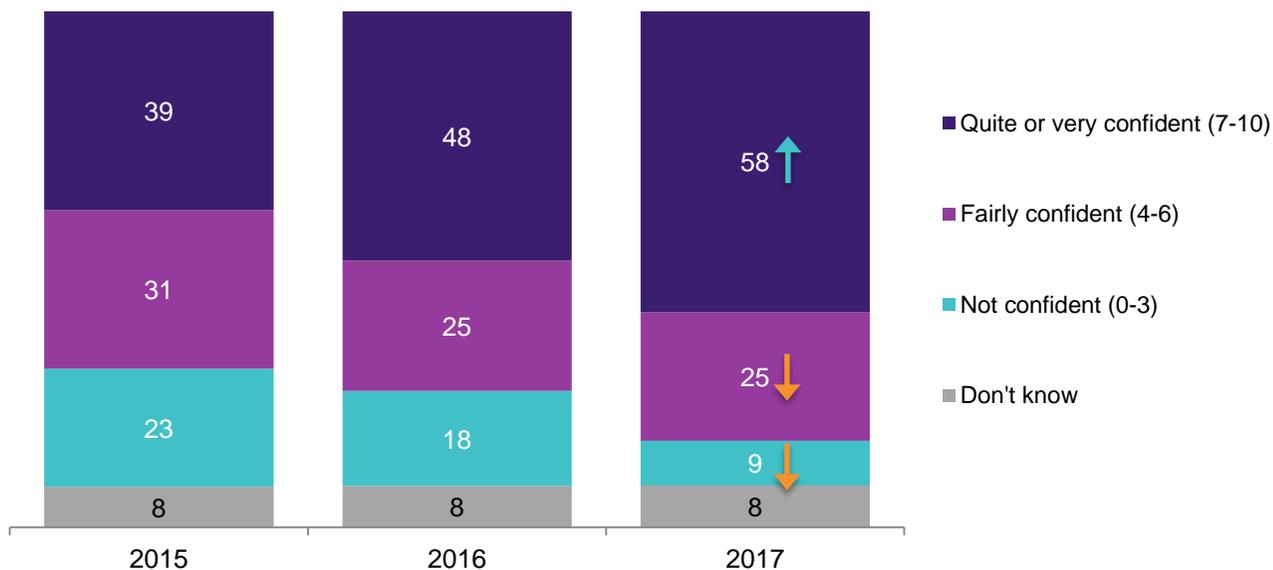


CONFIDENCE IN FINDING INFORMATION

Interestingly, despite the lack of choice, there has been a significant increase in Tasmanian residential consumer confidence in their ability to find the right information to choose a suitable energy plan or deal (58% gave a rating of 7 or more in 2017 compared to just 39% in 2015).

Vulnerable consumers* were significantly less confident in their ability to find the right information (49% gave a rating of 7 or more vs. 67% of non-vulnerable consumers).

Level of confidence in finding the right information to help choose a suitable energy plan or deal (%)



Base TAS residential participants (n=200).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.

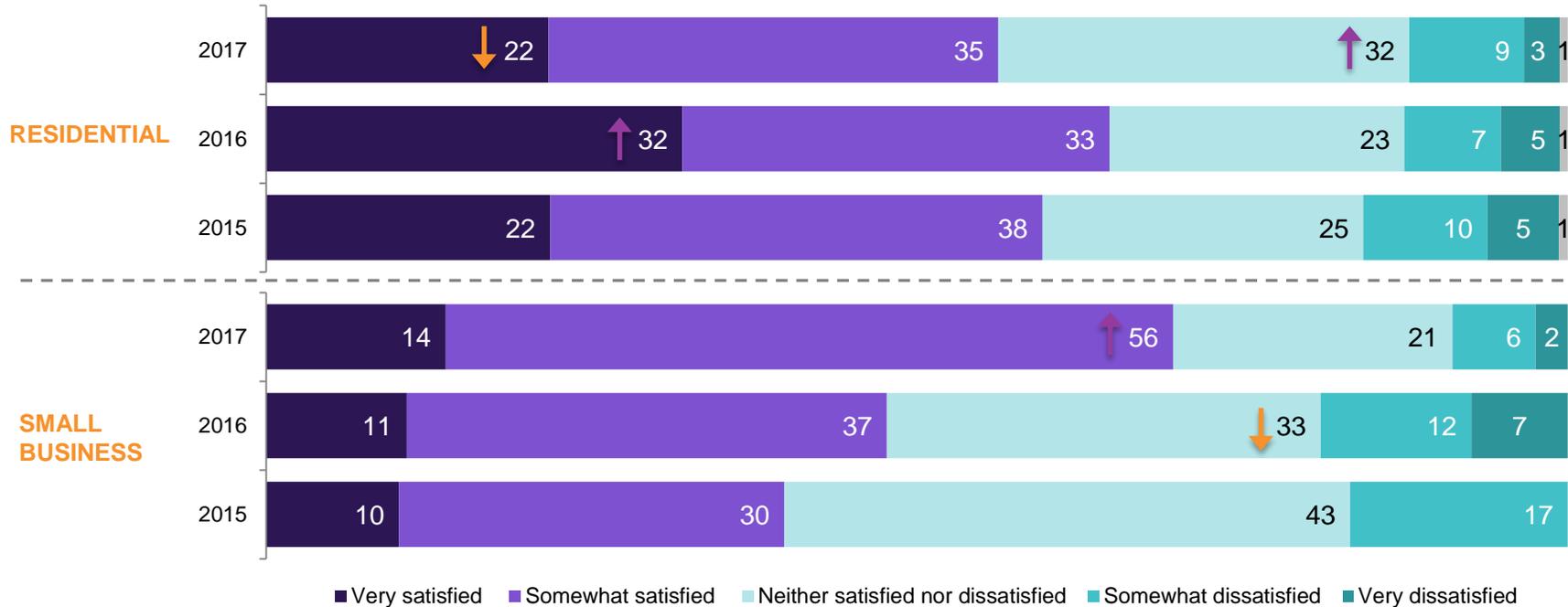
*Vulnerable consumers defined as those who have experienced financial hardship or difficulty paying their energy bills (indicated from D24 and D27).



SATISFACTION WITH ENERGY COMPANIES

Overall satisfaction with electricity companies remained fairly consistent among residential consumers, however the proportion who were very satisfied returned to 2015 levels this year (to 22% down from 32% in 2016). Further, the proportion who were somewhat dissatisfied rose to the highest levels for the survey (to 32% up significantly from 23% in 2016). Satisfaction among small business consumers was far higher this year, where 70% were very or somewhat satisfied vs. 48% in 2016 and 40% in 2015.

Satisfaction with electricity company (%)



Base: TAS participants (residential: n=200, small business: n=50). Due to low base sizes, gas results have been omitted.

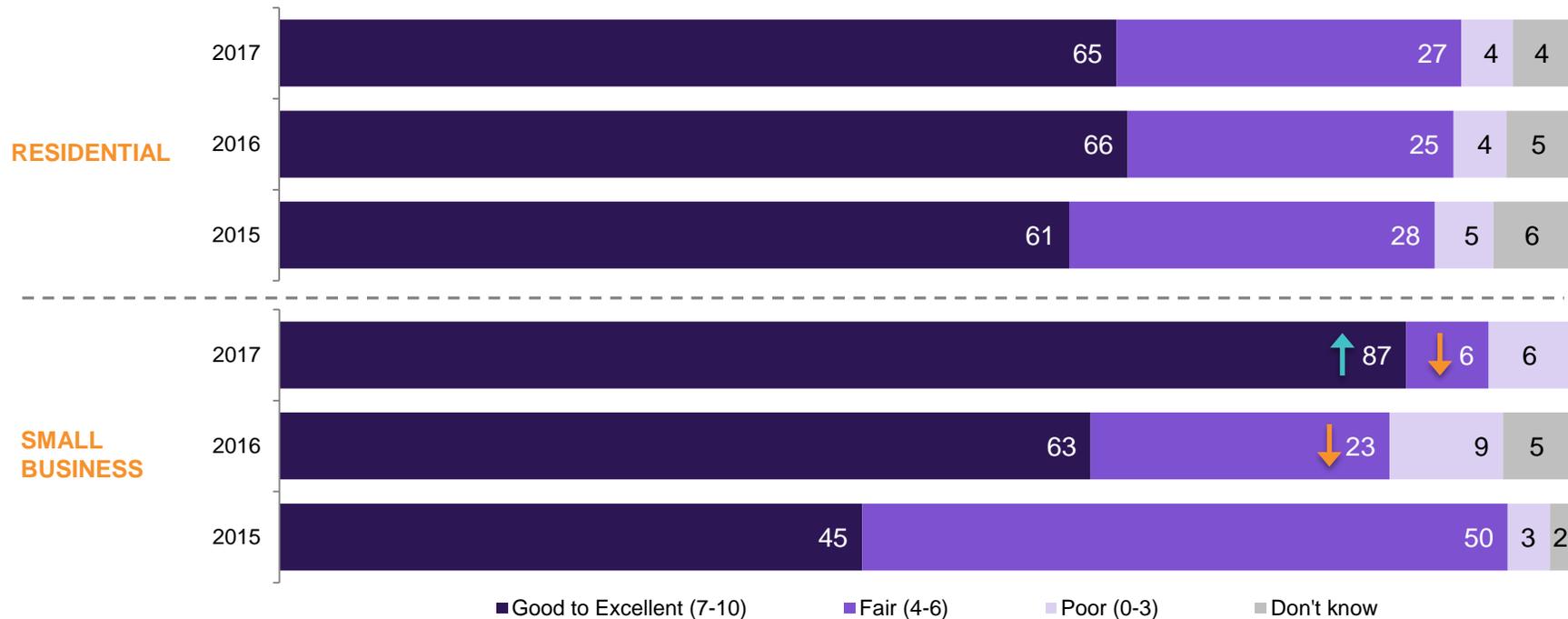
Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



QUALITY OF CUSTOMER SERVICE

Customer service ratings among residential consumers in Tasmania have remained relatively stable since 2015, with 65% giving their electricity company a rating of 7 or more out of 10 in 2017. By contrast and similar to satisfaction results, ratings among small business consumers significantly increased in 2017: 87% gave a rating of 7 or more vs. just 45% in 2015.

Rating of overall *quality of customer service* provided by electricity company (%)



Base: TAS participants (residential: n=200, small business: n=50). Due to low base sizes, residential gas results have been omitted.

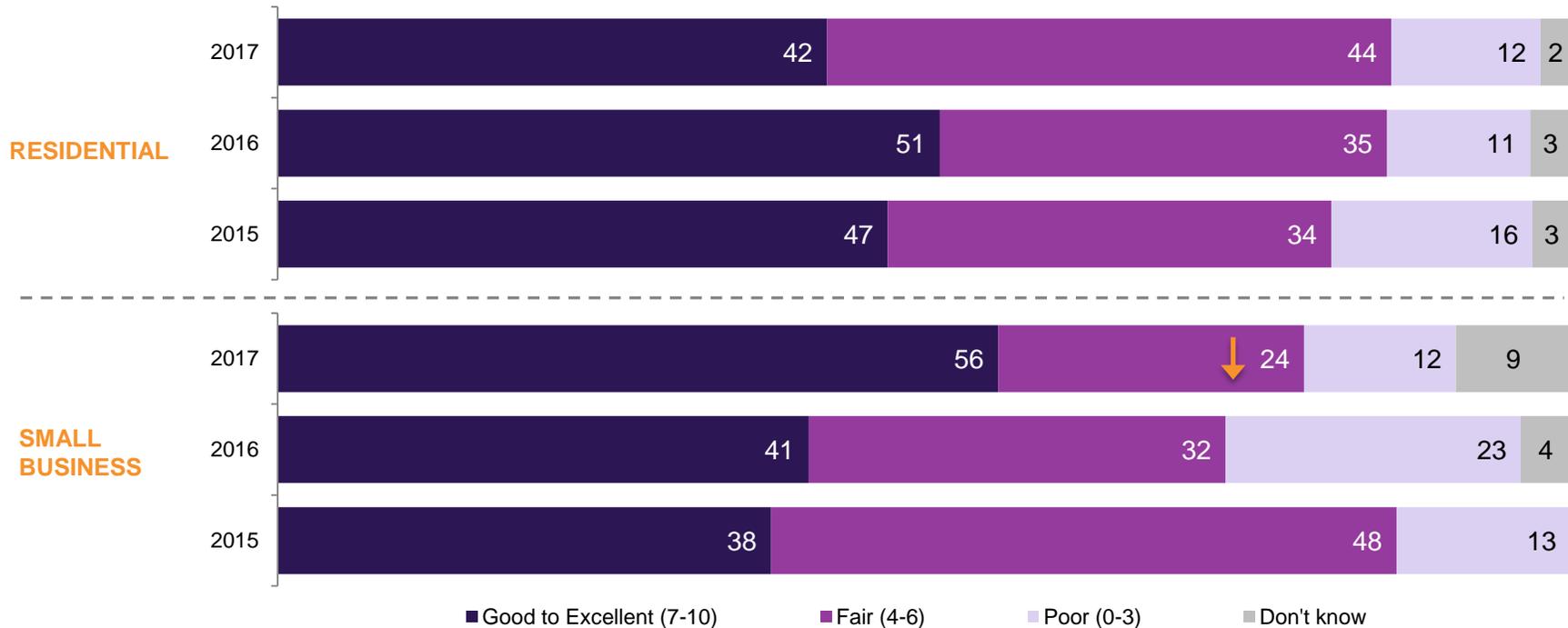
Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.



VALUE FOR MONEY PERCEPTIONS

Residential consumer perceptions of value for money were particularly low in Tasmania, with just 42% giving a rating of 7 or more in 2017 compared with 61% in the NEM. However, among small business consumers, value for money ratings have been steadily increasing over the past few years, from 38% in 2015 to 56% this year (though this is not statistically significant due to the small sample size).

Rating of overall *value for money* provided by electricity company (%)



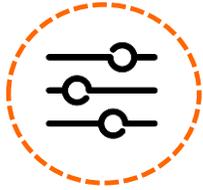
Base: TAS participants (residential: n=200, small business: n=50). Due to low base sizes, residential gas results have been omitted.

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

SOUTH AUSTRALIA



NEWGATE
RESEARCH



SUMMARY OF RESULTS (SOUTH AUSTRALIA)

Overall, the results among South Australian consumers have remained fairly steady in 2017, with few significant differences in comparison with 2016 results. However, consumers have become more engaged in the energy market over the longer-term. In doing so, more consumers became dissatisfied with the choices available to them, with results pointing to a desire for more innovation and value.

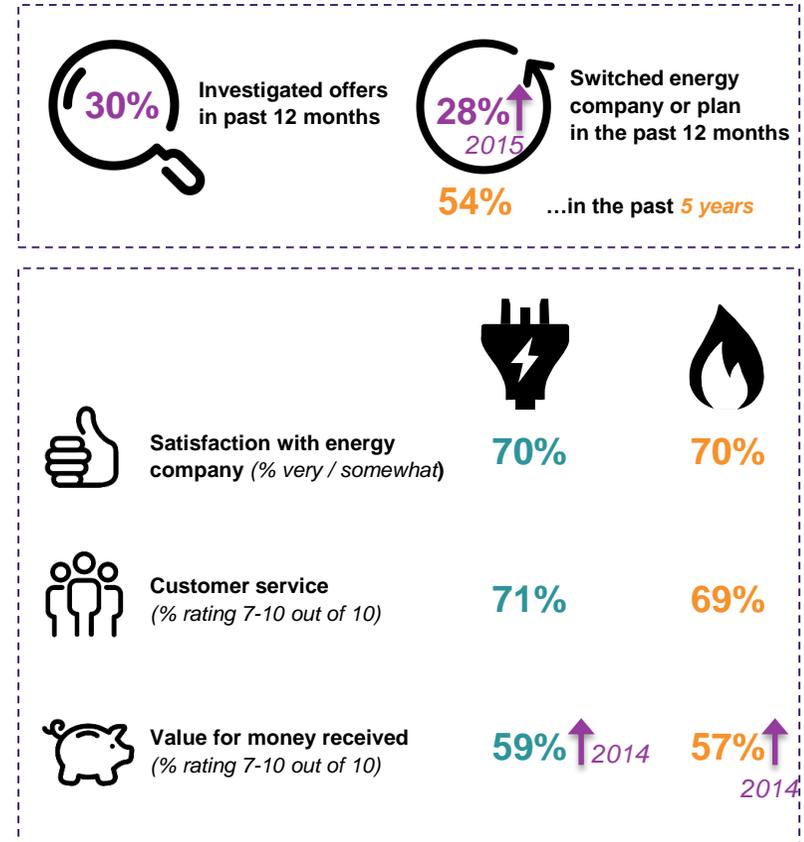
A key difference this year was a significant rise in the proportion of residential consumers who switched their electricity *plan* in the past 12 months (from 13% in 2016 to 20%). This contributed to the overall switching rates in South Australia rising significantly over the past two years: 28% had switched either their electricity or gas company or plan in the past 12 months compared to just 19% in 2015. The proportion of consumers interested in looking into a better deal also continues to rise.

There was a notable decrease in satisfaction with the level of choice in energy options in South Australia. More than half (55%) were very or somewhat satisfied compared to 65% in 2016. It is interesting that this perceived lack of choice does not appear to have contributed to inertia, given that switching has been on the rise.

Awareness of choice among residential consumers in South Australian hit an all-time high, with 97% aware they could choose their electricity company and 88% aware they could choose between different electricity plans – both higher than in benchmark years. A similar proportion of gas consumers were aware they could choose their gas company (92%) or plan (78%) and these rates were consistent with previous years.

The proportion of South Australian residents approached by an energy company in the previous 12 months continued to decline (at 34% for 2017 vs. 58% in 2014). The methods have remained consistent with calls and door-to-door visits most common.

Perceptions of energy companies have remained fairly stable in South Australia in terms of satisfaction levels and ratings of customer service and value for money. However, of concern is that there was a significant increase in the proportion of small business consumers who gave a poor value for money rating of their electricity company this year (19% gave a rating less than 4 out of 10 vs. 6% in 2016).



↑ ↓ Arrows denote significant differences compared to previous periods at the 95% confidence level; unless otherwise specified, differences here relate to changes between 2016 and 2017



NOTES TO THE READER (SOUTH AUSTRALIA)

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 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 in the page footer 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.

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.

Where the report references yearly breakdowns across residential and small business consumers, all base sizes follow the table below, unless stated otherwise. To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.

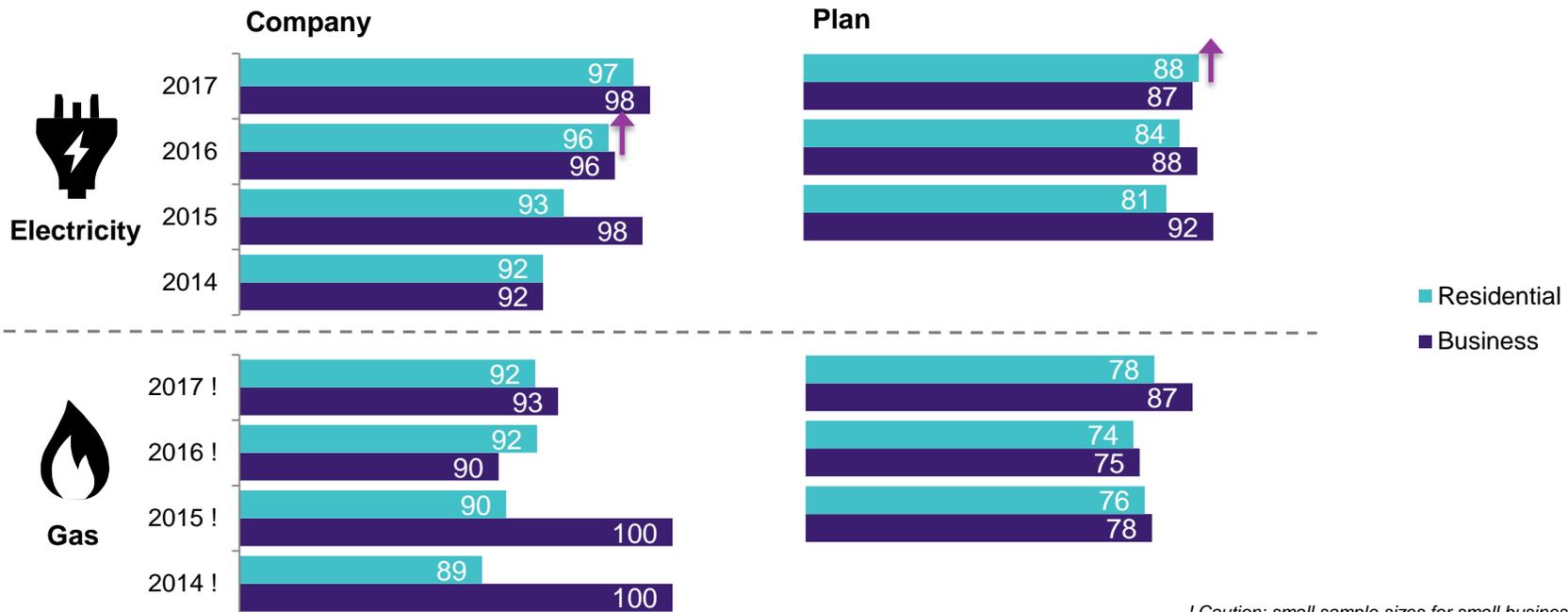
Sample sizes: South Australia (n=)	2014	2015	2016	2017
Residential				
All participants	327	401	400	398
Mains connected gas participants	179	202	216	248
Small Business				
All participants	80	100	101	100
Mains connected gas participants	19 !	23 !	20 !	45



AWARENESS OF ABILITY TO CHOOSE

Awareness of being able to choose their electricity company or plan remained very high among residents in South Australia (97% for electricity companies, 88% for plans) – both of which have increased since the benchmark years. Unlike some other jurisdictions with less reliance on gas, awareness of being able to choose their gas company or plan has also remained very strong and fairly consistent over time.

Awareness of ability to choose energy company or plan (% True)



! Caution: small sample sizes for small business consumers [2014 n=28, 2015 n=28, 2016 n=23, 2014 n=19.]

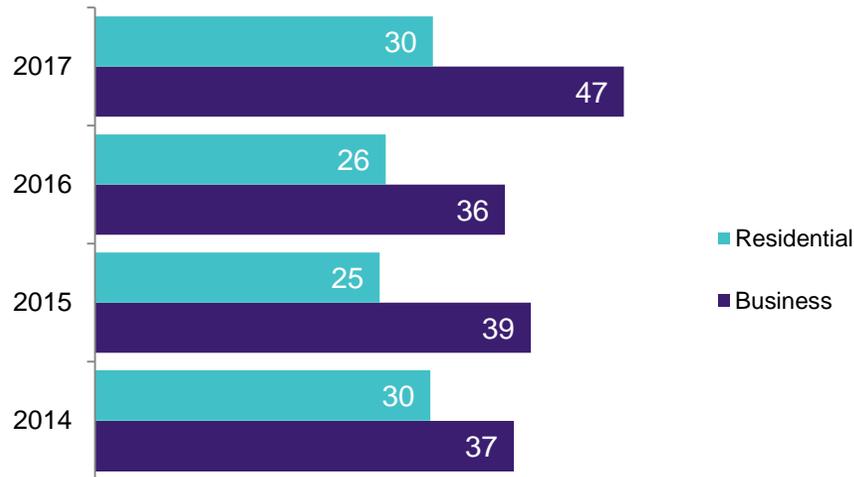
Base: SA participants (residential n=398, small business n=100) or those with mains gas (residential n=248, small business n=45).

Q13a. True or false: People in your area can choose their electricity company? / Q13b. True or false: People in your area can choose their gas company? / Q13c. True or false: People in your area can choose from a range of different types of electricity plans, price structures, contract lengths, and terms? / Q13d. True or false: People in your area can choose from a range of different types of gas plans, price structures, contract lengths, and terms?



INVESTIGATING OFFERS

Actively investigated offers or options in the past 12 months (% Yes)



The proportion of South Australian residents who actively investigated energy options or offers remained stable at 30% in 2017 (compared to 26% in 2016).

There appeared to be a slight increase for small business consumers, however due to a smaller sample size, it was not statistically significant (47% vs. 36% in 2016).

Base: SA participants (residential n=398, small business n=100).

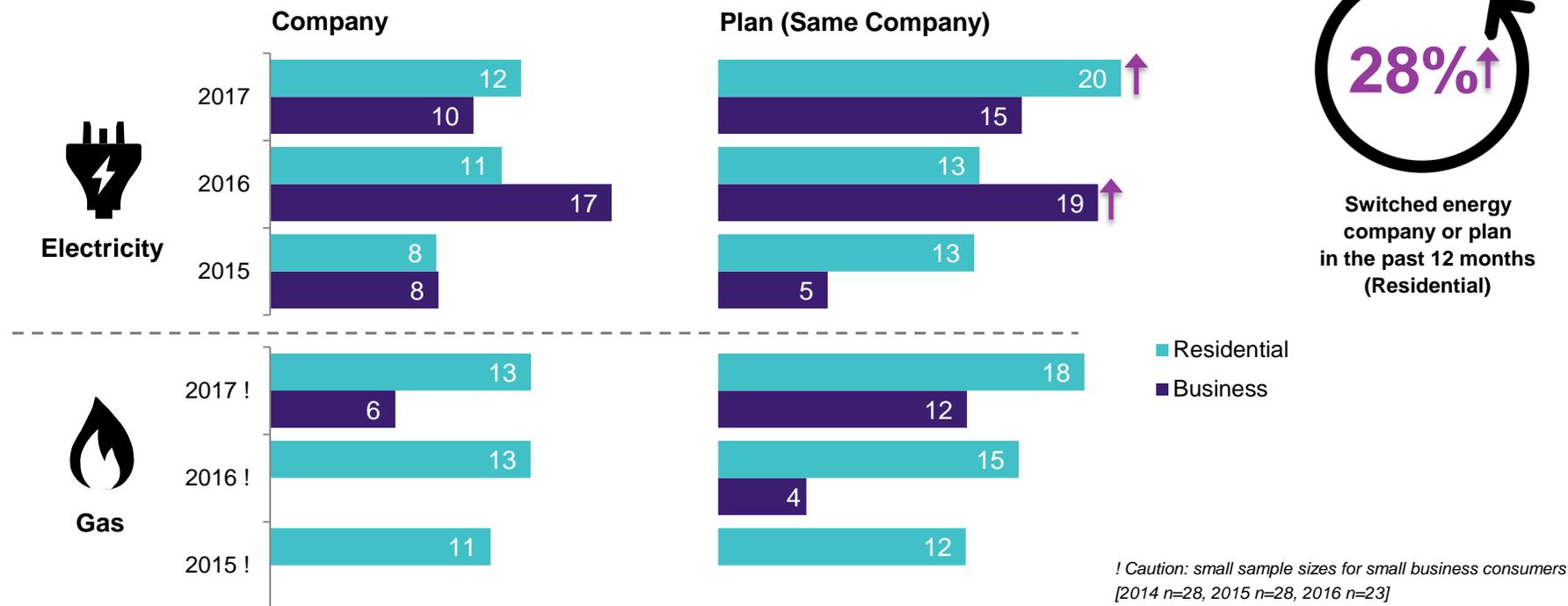
Q20. In the past 12 months, have you actively investigated different offers or options that you could potentially switch to?



RATES OF SWITCHING COMPANY OR PLAN

More residential consumers in South Australia switched their electricity plan in 2017 than in previous years (20% vs. 13% in 2016). Although not statistically significant, rates of switching gas plans have also trended up over time (18% in 2017 vs. 12% in 2015). This has contributed to a significant rise in nett switching of energy company or plan in South Australia, from 19% in 2015 to 28% this year.

Switched in the past 12 months (% At least once)



Base: SA participants (residential n=398, small business n=100) or those with mains gas (residential n=248, small business n=49).
 Q17. In the past 12 months, how many times have you changed the following? (not asked in 2014)

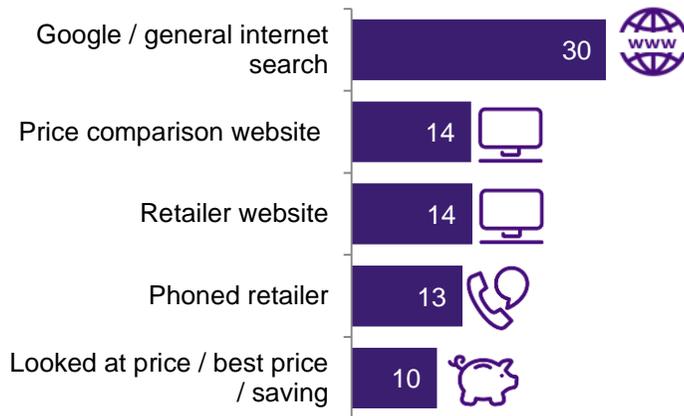


INFORMATION SOURCES USED TO SWITCH

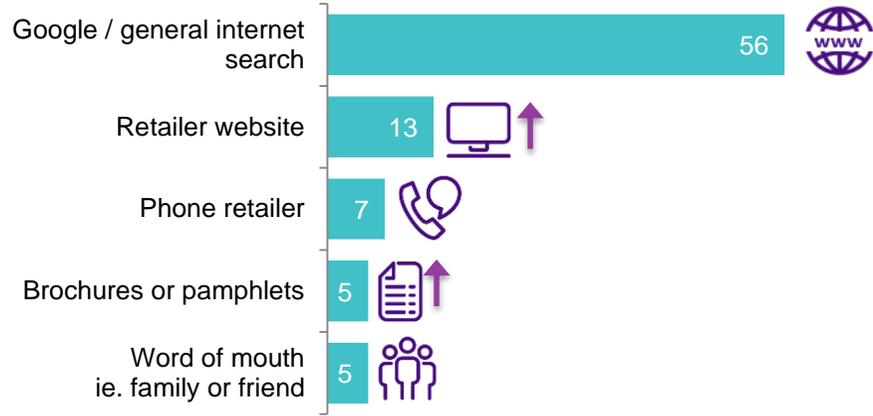
Internet searches (30%) and price comparison websites (14%) were the two most common sources of information for South Australian householders who had switched in the past 5 years or investigated offers in the past 12 months.

Those who had not engaged with the energy market were also likely to implement an internet search if they did want to look into their options (56%). However they were much less likely to expect they would use price comparison sites (highlighting a lack of awareness of them). Compared to previous years, there was an increased likelihood to use retailer websites (13% vs 6% in 2015) or brochures / pamphlets (5% compared to just 1% in 2015).

Top 5 information sources used by those who **switched or investigated offers** (%)



Top 5 sources those who **had not investigated or switched would use if they did want information** (%)



Prompted + unprompted **awareness of independent government comparator website:**

11% Energymadeeasy

Base: SA residential participants who switched energy company or plan in the past 5 years or who had investigated options in the last 12 months (n=246). / Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? / You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?

Base: SA residential participants who had not switched energy company or plan in the past 5 years or investigated options in the last 12 months (n=152). / 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? / Q40. Have you heard of the independent government comparator websites ...?

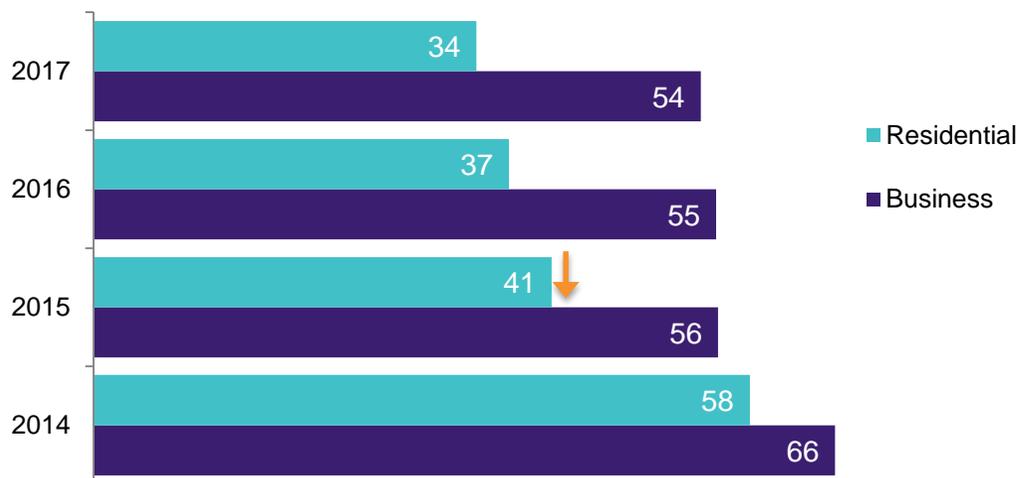


APPROACHED BY AN ENERGY COMPANY

The proportion of South Australian residential consumers approached by an energy in the last 12 months has continued to decline in 2017, with just 34% of participants saying they were approached compared to 58% in 2014. A similar downward trend was evident among small business consumers (54% in 2017 compared to 66% in 2014). It is worth noting that despite this trend, switching rates have been rising.

Among those who had been approached, telephone calls and door to door visits were the most common methods used by the retailers.

Approached by an energy company in the past 12 months (% Yes)



Top Methods of Approach (2017)



59% Residential
74% Business



42% Residential
33% Business

Base: SA participants (residential n=398, small business n=100). / Q18. In the past 12 months, have you been approached by an energy company offering to sell you electricity or gas?

Base: Participants who had been approached by an energy company in the past 12 months (residential n=135, small business n=54). / Q18B. In what ways were you approached by an energy company? Results shown are for telephone calls and door to door visits – among those approached.

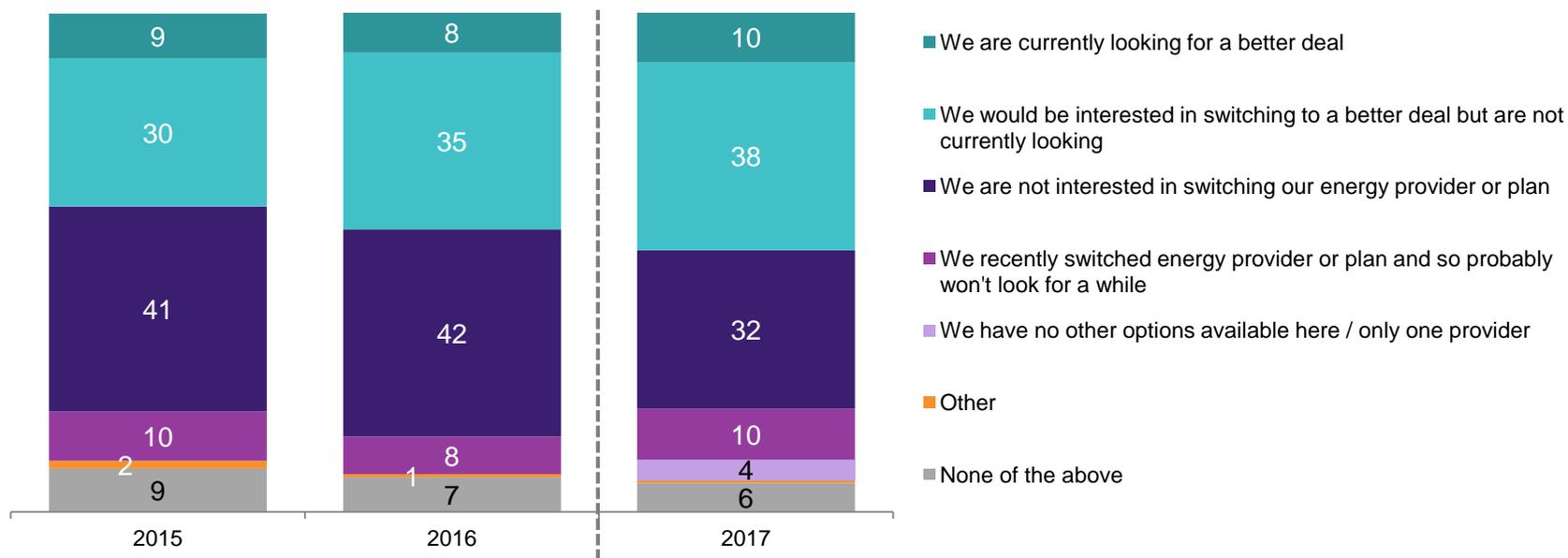


INTENTION TO SWITCH IN THE FUTURE

The proportion of South Australian consumers looking for a better deal has trended up slightly over time, with almost half of 2017 residential consumers surveyed interested in switching to a better deal (48%, including 10% who were currently looking).

Dissatisfaction with energy companies was correlated with interest in switching: 83% of *dissatisfied* residential electricity consumers were interested in switching to a better deal vs. 40% of *satisfied* consumers, similarly for gas: 74% vs 38%). This pattern was also seen among small business electricity consumers (77% vs 39%), but not for gas.

Interest in *looking for a better deal* (%)



Base: SA residential participants (n=398).

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

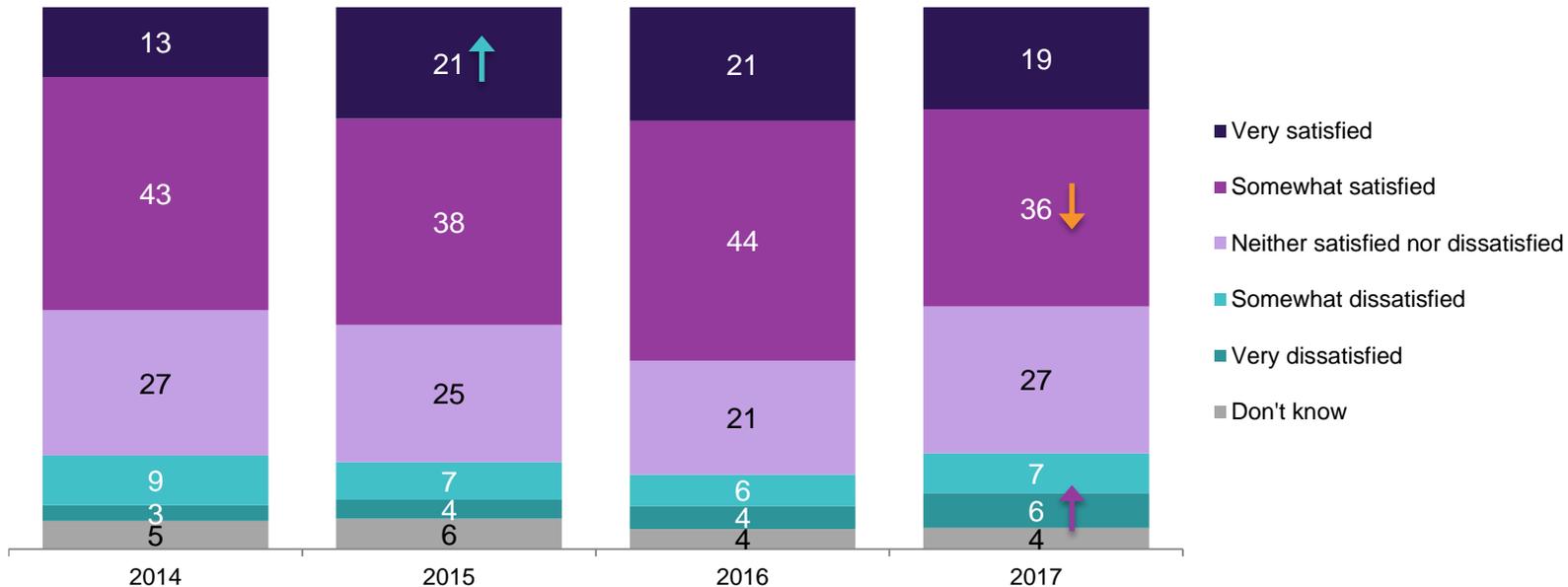


SATISFACTION WITH LEVEL OF CHOICE

Satisfaction with the level of choice in South Australia has decreased significantly in 2017, with 55% of residential consumers saying they were very or somewhat satisfied compared with 65% in 2016.

Looking further into consumer perceptions of choice, around four in ten thought the level of choice available in South Australia was just right (42%), one in five thought there was too much (19%) and around a quarter thought the level of choice was too little (23%). Results were very similar among small business consumers.

Satisfaction with the *level of choice* available (%)



Base: SA residential participants (n=398).

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?

Q78. And when it comes to the choices available to consumers in your state [if ACT] or territory in terms of energy companies and plans, would you say there is... ?

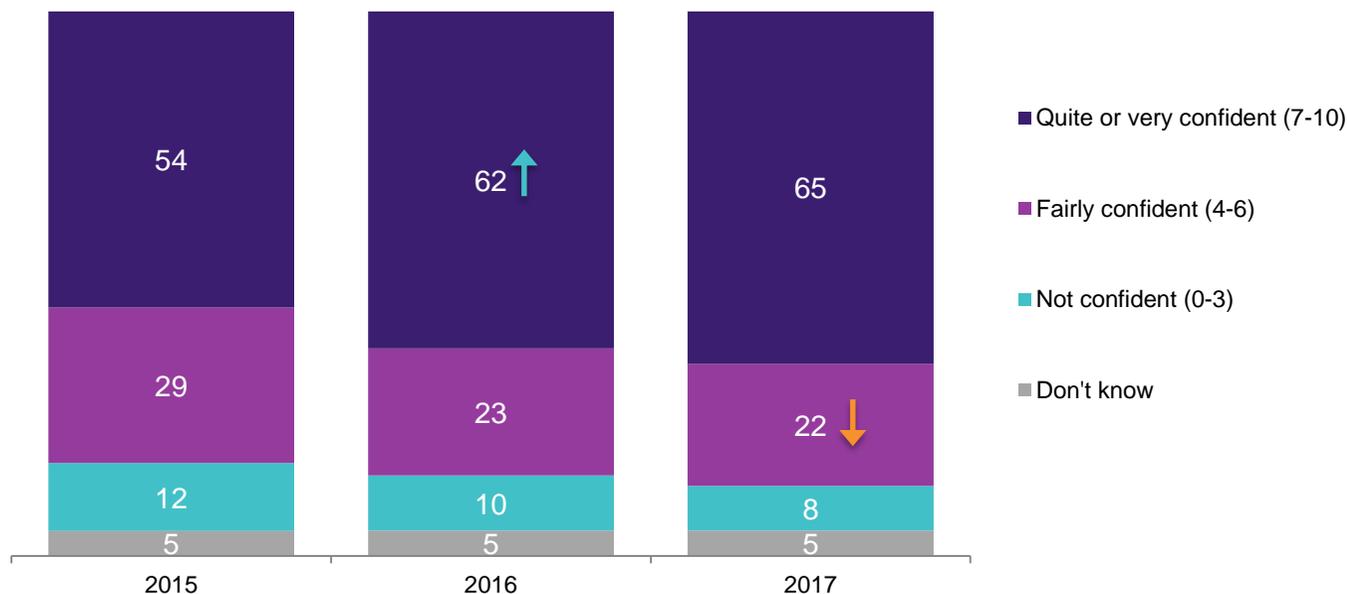


CONFIDENCE IN FINDING INFORMATION

Residential consumers' confidence in their ability to find the right information to choose a suitable energy plan or deal has continued to improve this year, following a significant rise in 2016. Two thirds were highly confident they could find the information they needed (65% rated their confidence at 7 or more out of 10), up from 54% in 2015.

Small business consumer confidence has also significantly increased over time; high levels of confidence are observed in 2017 (70% vs 44% in 2014).

Level of confidence in finding the right information to help choose a suitable energy plan or deal (%)



Base: SA residential participants (n=398).

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your needs? 10 = extremely confident, 0 = not at all confident.

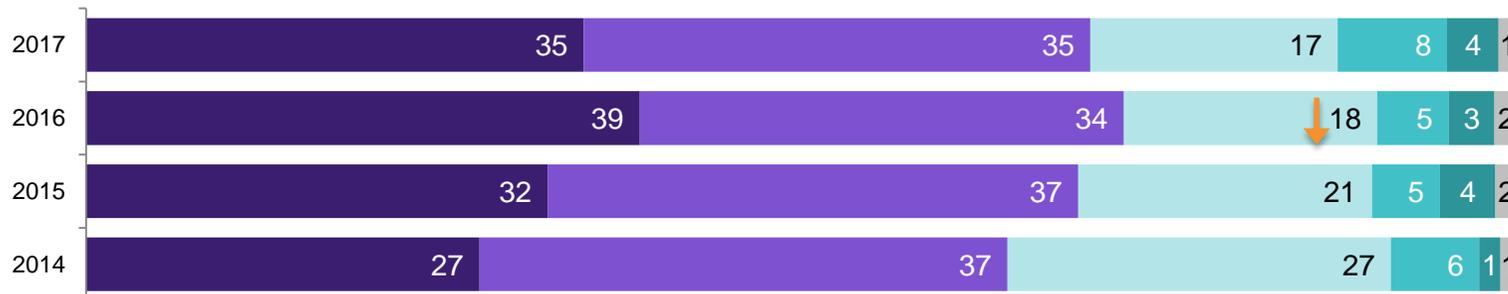


SATISFACTION WITH ENERGY COMPANIES

RESIDENTIAL CONSUMERS

Satisfaction with both electricity and gas companies has remained fairly stable, with no significant differences in 2017: the majority of electricity and gas consumers (both 70%) were somewhat or very satisfied.

Satisfaction with electricity and gas company (%)



■ Very satisfied ■ Somewhat satisfied ■ Neither satisfied nor dissatisfied ■ Somewhat dissatisfied ■ Very dissatisfied ■ Don't know

Base: SA residential participants (n=398) or those with mains gas (n=248).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



SATISFACTION WITH ENERGY COMPANIES

SMALL BUSINESS CONSUMERS

Small business consumer satisfaction with electricity companies has also remained relatively stable over the past 4 years. Although only indicative due to small sample sizes, fewer gas consumers were satisfied with their provider in 2017: 71% were somewhat or very satisfied vs. 87% in 2016.

Satisfaction with electricity and gas company (%)



■ Very satisfied
 ■ Somewhat satisfied
 ■ Neither satisfied nor dissatisfied
 ■ Somewhat dissatisfied
 ■ Very dissatisfied
 ■ Don't know

Base: SA small business participants (n=100) or those with mains gas (n=49).

Q2. How satisfied are you with your current [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q7. How satisfied are you with your current gas company?



QUALITY OF CUSTOMER SERVICE

RESIDENTIAL CONSUMERS

Residential customer service ratings of South Australian electricity providers stabilised in 2017 after exhibiting a significant improvement last wave. The majority rated their electricity company's customer service highly, with 71% giving a 7 or more out of 10 vs. 73% in 2016. Similar stability was seen for gas consumers (69% vs. 73% in 2016).

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: SA residential participants (n=398) or those with mains gas (n=248).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.

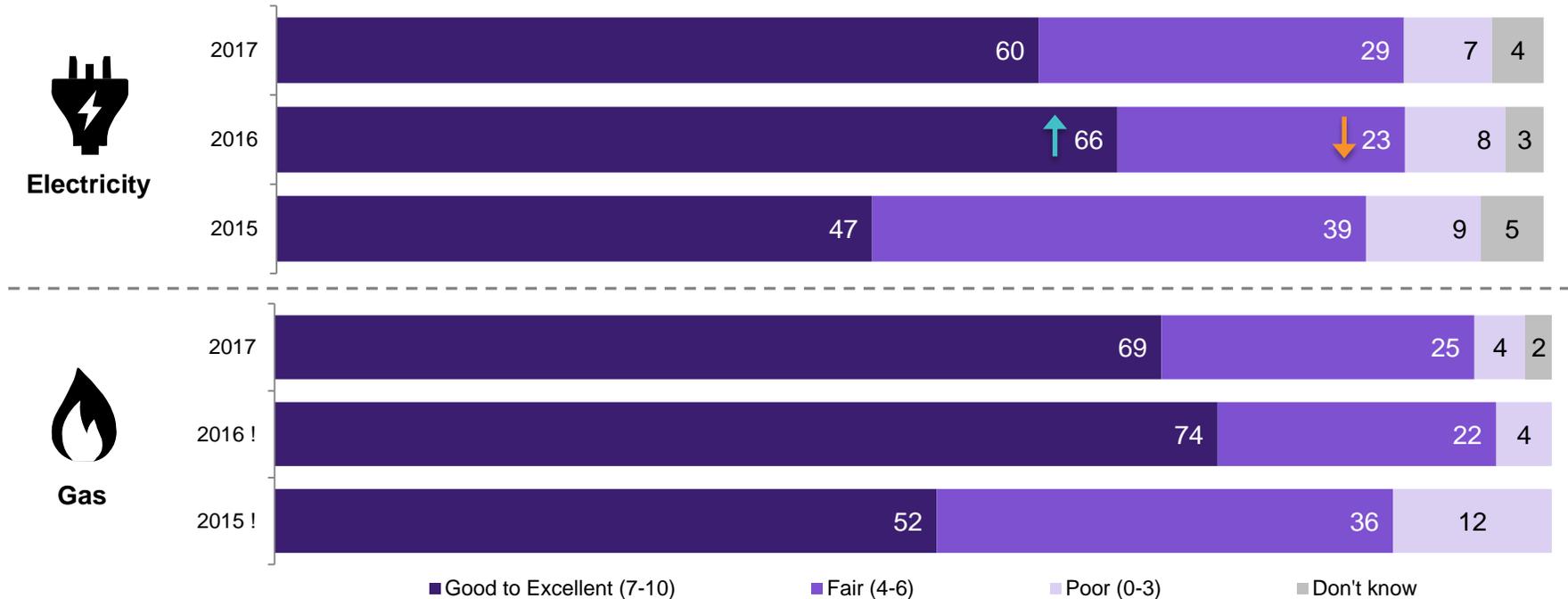


QUALITY OF CUSTOMER SERVICE

SMALL BUSINESS CONSUMERS

Compared to residential consumers, customer service ratings for small business consumers were slightly lower for electricity (60% vs 71% of residential) but very similar for gas (69% for both). Electricity ratings remained fairly stable in 2017 after exhibiting a strong rise in 2016 (66% in 2016 vs 47% in 2015). Although only indicative due to smaller sample sizes, a similar pattern was evident for gas.

Rating of overall *quality of customer service* provided by electricity and / or gas company (%)



Base: SA small business participants (n=100) or those with mains gas (n=49).

Q3. How would you rate the overall quality of customer service provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q8. How would you rate the overall quality of customer service provided by your gas company? 10 = excellent, 0 = very poor.

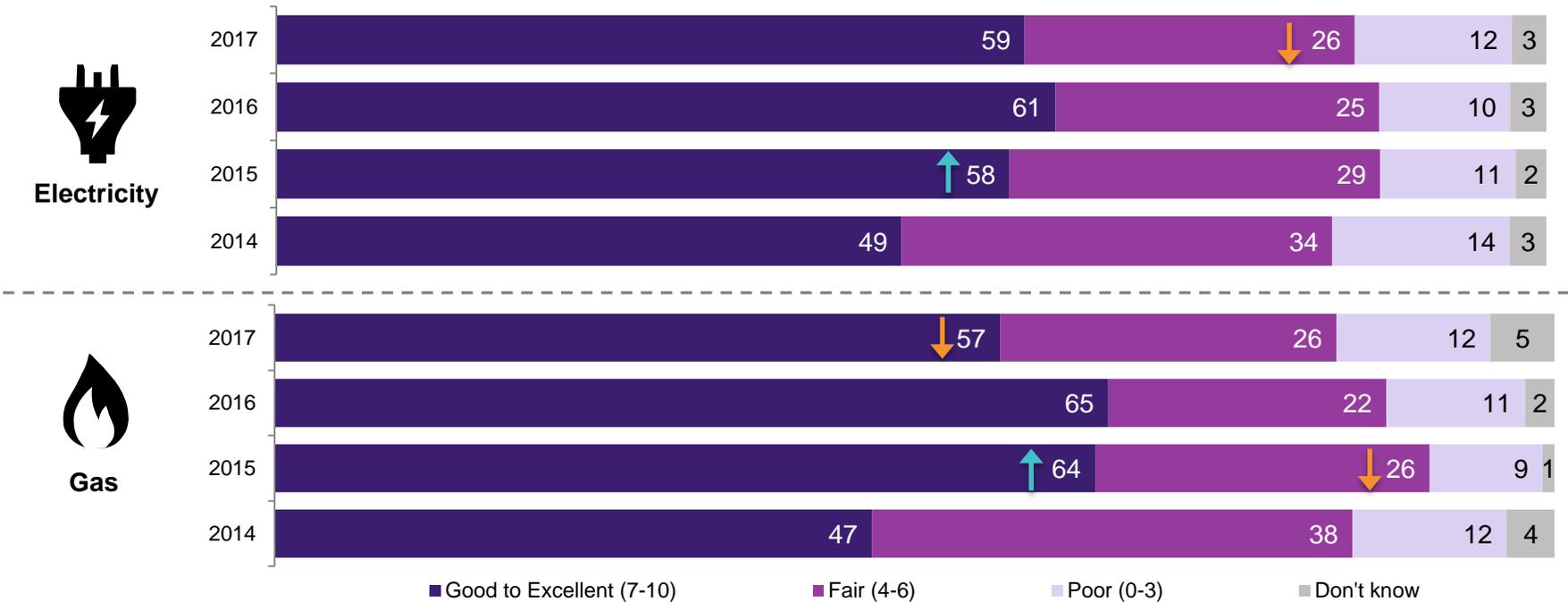


VALUE FOR MONEY PERCEPTIONS

RESIDENTIAL CONSUMERS

Residential consumer perceptions around value for money in electricity provision have remained stable in 2017, with the majority (59%) giving a high rating of 7 or more out of 10. Gas value for money ratings were quite similar, at 57% among residential consumers in 2017.

Rating of overall *value for money* provided by electricity and / or gas company (%)



Base: SA residential participants (n=398) or those with mains gas (n=248).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

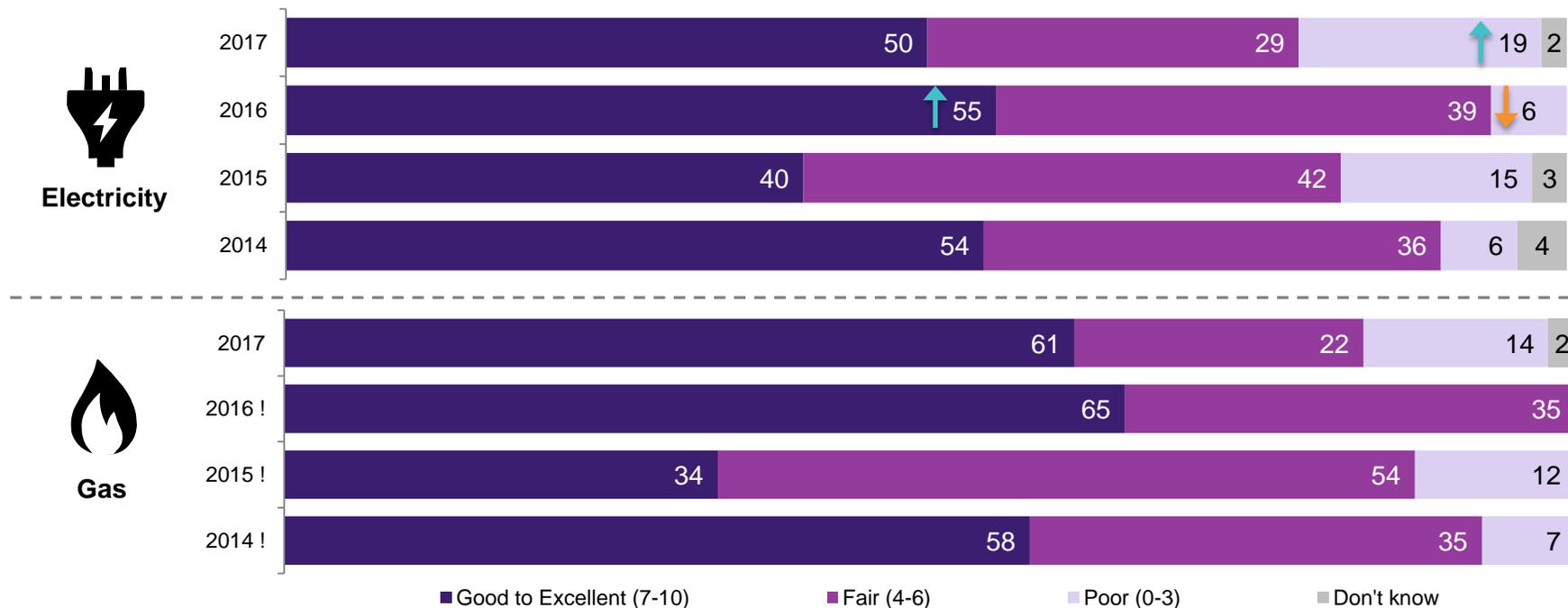


VALUE FOR MONEY PERCEPTIONS

SMALL BUSINESS CONSUMERS

Small business consumer perceptions of value for money tended to be slightly lower than for residential consumers. In 2017, 50% of electricity and 61% of gas consumers rated value for money as good to excellent (7 or more out of 10) compared with 59% and 57% of residential consumers respectively. Further, there was a significant increase in poor ratings of value for money for electricity this year (19% gave a rating of less than 4 vs. 6% in 2016).

Rating of overall *value for money* provided by electricity and / or gas company (%)



Base: SA small business participants (n=100) or those with mains gas (n=49).

Q4. How would you rate the overall value for money provided by your [if same retailer for electricity and gas] energy / [if different retailers for electricity and gas] electricity company? / Q9. How would you rate the overall value for money provided by your gas company? 10 = excellent, 0 = very poor.

APPENDICES



NEWGATE
RESEARCH



APPENDIX 1: QUANTITATIVE QUESTIONNAIRES

Segment	Attachment <i>(Double-click to open)</i>
Residential Online	
Residential CATI	
Business CATI	



APPENDIX 2: PARTICIPANT PROFILE

RESIDENTIAL CONSUMERS

	(n=)	1,797
Location	Regional	29%
	Metro	71%
Age Group	18-34	29%
	35-54	33%
	55+	38%
Gender	Male	48%
	Female	52%
Electricity company	AGL Energy	26%
	Origin Energy	25%
	EnergyAustralia	20%
	Lumo Energy	5%
	Simply Energy	5%
	ActewAGL	3%
	Red Energy	3%
	Click Energy	2%
	1st Energy	1%
	Alinta Energy	1%
	Dodo Power and Gas	1%
	Ergon Energy	1%
	Momentum Energy	1%
	Powerdirect	1%
	Powershop Australia	1%
	Other	3%
	Don't know	2%

	(n=)	1,797
Gas	Mains connected	55%
	Not connected	45%
Gas company	AGL Energy	36%
	Origin Energy	23%
	Energy Australia	19%
	Simply Energy	5%
	Lumo Energy	4%
	Red Energy	3%
	ActewAGL Retail	3%
	Momentum Energy	2%
	Alinta Energy	1%
	Click Energy	1%
	Dodo Power and Gas	1%
Other	1%	
Don't know	1%	
Have electricity and gas with same provider	Same	78%
	Different	22%



APPENDIX 2: PARTICIPANT PROFILE

BUSINESS CONSUMERS

	(n=)	450		(n=)	450		(n=)	450
Location	Regional	29%	Electricity company	AGL Energy	29%	Gas	Mains connected	39%
	Metro	71%		Origin Energy	26%		Not connected	61%
Industry or primary purpose of business	Professional, Scientific and Technical Services	25%		EnergyAustralia	17%	Gas company	AGL Energy	40%
	Construction	11%		Red Energy	6%		Origin Energy	20%
	Retail Trade	11%		Lumo Energy	4%		Energy Australia	14%
	Administrative and Support Services	7%		Simply Energy	4%		Simply Energy	10%
	Wholesale Trade	5%		ActewAGL	3%		Red Energy	4%
	Financial and Insurance Services	5%		Momentum Energy	3%		Lumo Energy	3%
	Agriculture, Forestry and Fishing	4%		Alinta Energy	2%		Momentum Energy	2%
	Transport, Postal and Warehousing	4%		Click Energy	2%		Aurora Energy	2%
	Rental, Hiring and Real Estate Services	4%		Diamond Energy	0%		ActewAGL Retail	1%
	Manufacturing	3%		Dodo Power and Gas	1%		Alinta Energy	1%
	Health Care and Social Assistance	3%		Ergon Energy	1%		Click Energy	1%
	Accommodation and Food Services	2%		Powerdirect	1%		Dodo Power and Gas	1%
	Other	14%		Powershop Australia	1%		Other	0%
				CovaU	1%		Have electricity and gas with same provider	Same
		Don't know		0%	Different	26%		
		Other		1%	Premises Ownership	Own	67%	
						Leasing	33%	



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