Report: Charge Transparency

Electricity Authority

[February 2014]

RESEARCH

AUCKLAND • WELLINGTON • SYDNEY

Contents

Introduction

Background

The Electricity Authority (Authority) has tasked the Retail Advisory Group (RAG) to review the transparency of information on consumers' electricity charges. The objective of the review is to promote competition by ensuring consumers have adequate and timely information to make informed choices on their electricity provider.

An issues paper was released in July 2013 seeking input on any problems or issues consumers' have regarding the availability of information and feedback on preliminary options for providing this information. Submissions were discussed in September 2013 and raised the need for research to understand consumer views. In late 2013 UMR conducted some initial qualitative research (focus groups) followed by a quantitative telephone survey at the end of 2013.

Research objective

The key objective of the research was to explore current attitudes towards information on electricity charges and whether consumers want more transparent information, and if so, the best way to provide this information.

Methodology

This study comprised of both a qualitative and quantitative stage.

Qualitative stage

The qualitative stage included six focus groups among consumers and six depth interviews among small business owners. The specifications for the six consumer focus groups were:

- 1 x Auckland general public, low income, including some on pre-pay
- 1 x Auckland general public, high income
- 1 x Whakatane, low income, including some on pre-pay if possible
- 1 x Whakatane, high income
- 1 x Dunedin low income
- 1 x Dunedin high income.

The six depth interviews with business owners included three respondents in Auckland and three in Wellington. The only criteria for these business owners was that they owned a small business and that they were the one who was responsible for making decisions on their electricity provider.

Quantitative stage

The quantitative stage was based on a nationally representative sample of n= 1,000 general public New Zealanders. The margin of error on this survey for a 50% figure at the '95% confidence level' is ± 3.1%.

The design of this survey was heavily influenced by the prior qualitative research. This ensured that the wording and design of the questions were developed in a way that would make sense to respondents and covered the topics that were most relevant to them. Several open-ended questions were used in the quantitative survey and the code frames for these were developed based on the findings of the initial qualitative research.

The survey was conducted at UMR's centralised telephone call centre in Parnell between 22nd of November and the 6th December 2013.

Segmentation analysis (Cluster analysis)

A segmentation analysis was conducted in this study to help provide more understanding to how different segments of power consumers view their energy use and need for more clarity around the charges they receive on their power bills.

Cluster analysis is a statistical tool for the segmentation of data. As an exploratory data analysis technique it is designed to reveal natural groupings of respondents in a given data set. The basic criterion used for this is distance; that is, data observations close together should fall into the same cluster while data observations far apart should be in different cluster groups. Ideally the observations within a cluster would be relatively homogenous, but different to those contained in other clusters.

In this survey respondents were asked about a number of aspects relating to their electricity usage and energy saving behaviours, their attitude toward their current supplier as well as psychographics and demographics. They were also required to rate a number of statements on 0 to 10 scales. Topics covered included:

- usefulness of information on electricity prices;
- interest in information being included in their power bill;
- how trustworthy power companies, banks and telecommunication companies are in terms of offering the best deals.

The cluster analysis was enhanced by performing prior factor analysis. This allowed for a greater number of variables to be incorporated into the cluster analysis and thus provided a richer and more accurate picture of the population in question. Factor analysis combines variables which can be on varying scales according to similar themes as defined by survey responses.

Cluster analysis then assigned each respondent to a 'Cluster' according to the responses they have given. This means that respondents within a cluster are more similar to each other than they are to those in other clusters, judged by the factors used. The six cluster solution chosen is efficient in terms of minimising the distance between all the members of any one cluster and that the members of each cluster are largely homogenous.

However, It should be noted that the descriptions of the clusters provide 'caricatures' of the groups, and do not 'typecast' every member of the cluster.

Reporting notes

This is a joint qualitative and quantitative report. The report findings are structured around the more definitive quantitative results and where appropriate some additional flavour or understanding is included by inserting some of the qualitative findings. As a rule the quantitative findings are presented first, with qualitative flavourings following. Whenever we change from quantitative to qualitative results we make this clear by stating where the findings have come from such as. "In the focus groups ..." or "focus groups participants said ...". Also in the report as a further differentiator between the qualitative and quantitative findings whenever we talk about the quantitative figures we refer to the figure being a measure of what 'respondents' said and we use the term 'participant' to refer to what people who participated in the qualitative research said.

To provide additional flavour and ensure the voices of power consumers are heard in this report whenever we provide qualitative findings we include some quotes from the focus groups that capture the theme we are reporting on. The quotes are always in the following format.

> *They will always be indented like this and in this gray coloured text and be followed by a identifier which lets the reader know where the participant is from, their income level and gender.* (Dunedin, high income, male)

Executive summary

Overview

Respondents are mostly satisfied with how their power bills are laid out and express limited interest in receiving more detailed charge-related information. However, there is some confusion around trying to make comparisons between companies. So while there is little interest in more detail, there is solid interest in a standard rate that could be used to easily compare the overall charge across providers.

The segmentation analysis showed two segments (that made up around a third of the sample) who are more interested in additional information than the others. These segments are more likely to be on middle to lower incomes, renters and more motivated to take action to reduce their power consumption. Only one of these segments expressed stronger interest in charge-related information while the other is more interested in information related to their use of power.

Energy efficiency behaviour

A large majority (78%) of respondents felt they were well-informed when it came to managing their power use and almost a half (46%) said they were making a lot of effort when it came to managing how much power they used. Those on lower incomes tended to be making more effort than their higher income counterparts.

Out of respondents who reported putting in effort to manage their power the most common action reported was turning lights off (73%), this was followed by turning appliances off at the wall (45%). Other ways mentioned (in the double figures) included taking shorter showers (16%), using energy efficient light bulbs (12%), heat pumps (11%) and energy efficient appliances (10%).

From a list of prompted energy efficient behaviours the action that the greatest portion (49%) said they would be willing to do was use as little power as possible by doing such things as turning off lights or taking shorter showers. A similar size portion of the sample (47%) said they would be willing to ensure they were using the best type of electricity for their needs. This was followed by 45% of respondents who were willing to carefully monitor their power usage.

The most popular way that respondents were sourcing information about managing their electricity was via the internet (63%) most likely using Google as a starting point. Power companies were the next most popular way with almost one in five (18%) indicating they had sourced information on managing their power via this channel.

Just under half (47%) of respondents indicated that they would like more information about power use. Out of those who indicated interest in this type of information half (51%) were interested in more power saving tips and just under a quarter (23%) were interested in the power usage of specific appliances.

Understanding power bills

Less than half (45%) of respondents thought that it was easy to compare what power companies charged for their services and 27% felt that it wasn't easy. Older respondents (over 60 years) were less likely (38%) to find it easy to compare charges compared to 51% of those fewer than 45 years.

Respondents who felt it wasn't easy to compare charges held this view mainly because the power companies had different rates and plans, mentioned by 28% of these respondents, followed by difficulty in understanding what you are being charged (25%) and a lack of transparent information (22%).

When these respondents who claimed it was not easy to compare power company charges were asked what could be done to improve this situation. The most popular response was to provide a standard comparable rate across power companies (30%), followed by more transparent information (25%).

There was a moderate level of concern (45% expressed concern) about how clearly information on electricity charges is outlined in power bills. It is important that this figure is interpreted within the context of a large majority (78%) of respondents who were satisfied that their power bill was easy to understand and 76% who felt it contained all the information they needed. The focus group findings provided some insight into why there was moderate concern about clarity yet high levels of satisfaction. Participants in the groups articulated little appetite for a more detailed power bill as generally bills were viewed as fit for purpose so a more comprehensive bill was considered unnecessary. Most also suggested that they wouldn't have time to digest a more comprehensive bill.

Almost every respondent (92%) said they paid their bill early to take advantage of the prompt payment discount and the vast majority also paid electronically. While 82% indicated that they normally opened their electricity bill around half (48%) only looked at the dollar amount they needed to pay.

Additional information

Respondents were most interested in energy-related information that concerned pricing with over two thirds (67%) saying they were interested in a benchmark rate that could be used to compare pricing across companies. There were moderate levels of interest in how power companies operate with half declaring interest in sources of generation and views of their customer service (51% and 50% respectively).

Out of those who expressed interest in information about power companies the largest proportion (44%) wanted that information to help them select a new provider.

The information respondents were most interested in including in their power bill included the different rates their company offered (74%) and a graphic that showed how their power usage compared to other similar households (66%).

There was also reasonably strong interest in retail charges (65%) and a link to the Powerswitch website to compare deals (64%). The largest proportion (49%) of respondents wanted information to be updated on a monthly basis. Respondents preferred to receive most information on energy-related topics either via a standalone website (27%) or email (25%). There was also reasonable interest via their retailer's website (19%) and with their electricity bill (15%) or flyers (14%).

Respondents were asked how useful a range of sources and types of information were on electricity prices. The most useful types of information were:

- A standard benchmark rate per unit of power, so you can compare prices with other power companies (75% declared useful).
- This was followed by 73% of respondents who indicated that, 'an independent website that compares the prices of different power companies' would be useful.
- Also in the top three was, 'the different rate or plans offered by all the power companies on an independent website' (68% useful).

Power company relationship

There was strong overall satisfaction (66% satisfied) with the services that power companies provided. However, levels of satisfaction were lower for specific areas of service with about half satisfied with the provision of extra services and the value received for their money (49% and 48% respectively).

Respondents were hesitant to say that they trusted their power provider to offer them the best deal on their electricity. Most did not have a view either way (44% being neutral) followed by 38% who felt they would trust their provider to offer them the best deal and 17% who wouldn't trust them in this way. There wasn't much in it, but when it came to trusting if you were getting the best deals from a range of service providers respondents were more likely to trust their bank (44% trusted), followed by their power provider (38%) and then their telecommunications company (31%).

Over two thirds (68%) said they had not switched power companies in the last two years. Changing power companies was an infrequent activity. Out of the 31% of respondents who had switched companies 80% said they had only switched once during the two-year period, 17% had switched twice and only 3% had switched more than twice.

The main reason why respondents had not switched power companies was because they were content with the pricing of their current power company or were certain their current company would match any deal (38%) followed by being happy with the service they received from their current provider (34%).

Segmentation analysis

The survey sample was segmented based on their energy efficient behaviour and desire for more information relating to the transparency of electricity bills. The analysis produced six segments which we labelled:

1. Receptive strivers
2. Uninformed strugglers
3. Wealthy cynics
4. Self-informed actives
5. Active Loyalists, and
6. Apathetic conservatives.

Out of the segments identified in this research the Strivers (21%) and the Strugglers (15%) which together make up over a third of the sample (36%) were most likely to be interested in more information. The Strivers were most willing across all segments to try a range of energy efficient measures and the most interested in receiving more energy-related information. The Strugglers who are the lowest income segment and least tertiary qualified claimed to be putting in the most effort to conserve power. They were more likely to want information about power use but less likely to want more detailed information related to energy charges. We suspect this is because they are more comfortable with understanding energy efficiency behaviours and less with getting their heads around the complex range of charges that make up their bills.

The Wealthy cynics (18%) are least likely to trust power companies and that service providers would provide them with the best deal. They are more likely than average to want power-related information and to think that price-related energy information would be useful to them. The Self-informed (18%) are most likely to declare being knowledgeable about how to manage power. They are less interested in additional power-related information. They are most likely to switch power companies, use online tools to review their power bill and are the most satisfied with their provider. This all suggests the Self-informed currently have all they need to get the best out of their power company.

The Loyalists (14%) are our oldest segment, as the name suggests they are by far the most loyal group. This cluster is most likely to trust their power company and do the most they can to reduce their power use such as turning off lights and taking shorter showers. They are also less interested in additional information relating to power. Finally the Apathetic conservatives (14%) are a high-income group and are the least engaged with the ramification of their power use. They are putting in the least effort to manage their power bill; they are least likely to take actions to preserve the environment and are least interested in receiving additional information.

Energy efficiency behaviour

3.1 Declared knowledge about managing power use

A large majority of respondents believe they are well-informed when it comes to managing power usage with just over three quarters (78%) claiming to know ‘a lot’ or a ‘fair amount’ about it. Overall, one quarter said they knew a lot.

A notable minority (17%) reported knowing ‘not that much’ and only 4% of respondents said they knew ‘hardly anything’.

Respondents under the age of 30 were significantly less likely to report knowing ‘a lot’ or a ‘fair amount’ about managing power usage (67%), with a large proportion stating they know ‘not that much’ (29%). Māori (70%), Asian (63%) and Pacific (60%) ethnicities were also less likely to say they knew ‘a lot’ or a ‘fair amount’.

Customers of Mercury and TrustPower were more likely to declare a reasonable knowledge of how to manage power usage (85% and 83% respectively), as did those that spent less than $100 per month on power in both winter (86%) and summer (84%).

KNOWLEDGE ABOUT HOW TO MANAGE POWER

How much would you say you know about how to manage your power use - a lot, a fair amount, not that much or hardly anything?

	2013 %
A lot	25
A fair amount	53
TOTAL 'A LOT' + 'A FAIR AMOUNT'	**78**
Not that much	17
Hardly anything	4
TOTAL 'NOT THAT MUCH' + 'HARDLY ANYTHING'	**21**
Unsure	1

Base: All respondents; n=1000

In the focus groups many participants noted that there was a lot of energy saving tips available to them via main stream media such as television advertisements.

> *I think everyone hears enough about it on TV, about how to save power, just a matter of whether you want to apply it or not.* (Dunedin, high income, male)

> *Some of the ads they have had on TV over the last few years are actually quite good for airing those conversations about what you can and can’t do, things that you just take for granted. I actually think there has been a lot of work done and I think those ads are well pitched.* (Whakatane, high income, male)

A few specifically mentioned the Energy Wise (saver) advertisements.

> *You have the Energy Wise chap saying did you know you can do this and that. I find that is actually quite good and you can go to the Energy Wise website. The Energy Wise thing is good because it is not only cars it is everything about your foot print like when you buy a car how energy efficient is it. And same with the household where you can save money.* (Auckland, low income, male)

> [Do you feel you have enough information about power saving habits?] *It is on TV on those Energy Saver adverts.* (Auckland, high income, male)

A few reported picking up tips from radio advertisements.

> *There is a radio ad saying only fill your kettle as much as you need and don't use a pan smaller than the element.* [Do you do that?] *Yes I do think about it when I fill the kettle up.* (Whakatane, high income, female)

Power companies were also a source of energy saving information for several participants.

> *The thing about turning off the standby stuff came from the Genesis Energy website, they invited us to look at tips so I had a read through that.* (Dunedin, high income, male)

> *I had power company websites, Consumer magazine and/or website and What's My Number.* (Dunedin, low income, rural, female)

> *I rang the power company and the guy actually told me what I can do to stop my power bill being too high.* (Auckland, low income, male)

3.2 Effort put into managing power use

Almost half of respondents (46%) reported making an effort to manage their power usage with 18% making a lot of effort. A third chose the midpoint of '3' on the five point scale to rate their level of effort and 20% do not make much effort.

Females were slightly more likely than males to make an effort to manage power usage (49% compared to 43%). Furthermore, respondents 60 years of age and over were slightly more likely to make an effort than those under 30 (49% compared to 42%).

A general trend exists whereby those with lower household incomes were more likely to report putting effort in to managing power use (56% of those with $30,000 or less) compared to those with higher household incomes (34% of those with more than $100,000). Māori were more likely to say they made an effort (55%), ahead of Pacific peoples (41%) and Asians (37%).

Regionally, those from the provincial South Island were most likely to say they made an effort (52%) and those from Wellington were the least likely (37%). Customers of Meridian Energy were more likely to make an effort than any other company (59%) with Genesis being the company whose customers were least likely to make an effort (42%).

Respondents that spend less than $100 per month in both summer and winter (59%) and those that changed power companies in the past two years were more likely to report making efforts to manage their power usage.

Not surprisingly, those that know 'a lot' or 'fair amount' about managing power usage were more likely to report putting in effort to manage usage (57%) compared to those that know 'not that much' or 'hardly anything' (35%). Those interested in monitoring power usage were also more likely to report putting in effort to manage usage (56%) compared to those that were not interested (26%).

EFFORT MADE TO MANAGE POWER

Using a scale of 1 to 5 where 1 means you make 'a lot of effort' and 5 means you make 'very little effort', how much effort do you make to manage the power use in your household?

	2013 %
1 – A lot of effort	18
2	28
TOTAL MAKE AN EFFORT	**46**
3	**33**
4	10
5 – Very little effort	10
TOTAL DO NOT MAKE MUCH EFFORT	**20**
Unsure	1

Base: All respondents; n=1000

Higher income participants in the focus groups tended to make less day to day effort to manage their power bill. These participants generally felt that their power bill was not excessive and they paid it without too much thought.

> [Do you do anything to consciously manage your power use?] *Not really.* [You don't think about it?] *No. Most of the consumption tends to be similar between months and it doesn't really go up unless you use winter heating so I always know what it is going to come in at roughly.* [Do you think you pay a lot?] *I don't think I pay an excessive amount.* (Auckland, high income, male)

> *To be honest I have never thought about comparing. Our power bill is about $70 - $100 a month and compared to the other expenses that go out it is just one of those things I don't begrudge paying that for our electricity. Obviously if it was to shoot up or something was to change then yes. But I will just pay the bill and carry on.* (Whakatane, high income, female)

However, they were more likely to say that they undertook other energy saving steps that required less personal effort and more financial resources such as installing double glazing and insulation.

> *We live in a fairly new house, it is five years old, I intentionally put insulation under the concrete floor and double glazed and we have got a big tile area with huge windows. We find in winter we have got a gas heater but if we use it once or twice we just don't because there is enough warmth from the sun that comes through.* (Whakatane, high income, male)

> *When I bought my current place it was pretty cold even though it was a modern home so I did the initial install of things like insulation through the ceiling and stuck in a heat pump and a central ventilation system. So I did that at the outset anyway. I have always only had lights on in the room we are using but I don't go around switching things off at the wall or anything like that. It just seems to me to be too much of a hassle really to go to that extent.* (Auckland, high income, male)

Lower income participants often talked about more day to day measures that they tried to implement to conserve power use and save money.

> *We are major, we don't use the dryer at all unless it is an absolute emergency, I try and only do two loads of washing towels and things but we have got the smart washing machine for levels. It is only since we have had a baby that our power bill has been up because we have got a little heater that comes on at 3 o'clock in the morning until 5 o'clock. But this is the most our power bill has ever been and it is only because there is a baby in the house. It's $220. We are quite frugal.* [How much was it normally?] *$160 - $180. We just have the heating that comes on in the morning so it is warm for the kids, but it is only since the baby, the nine year old has to man up and handle it.* (Whakatane, low income, female)

> *Because I live alone and I don't' want to pay extra money to heat I just get extra blankets and not have to heat my bedroom at night and that sort of thing.* (Dunedin, low income, rural, female)

There also seemed to be a gender divide among those who took the lead in prompting energy efficient behaviours around the household. In many cases the mother or wife in the family appeared to be taking the main initiatives to reinforce positive energy saving habits around the household.

> *I am the one who goes around turning things off and putting the heat pump down a few degrees and I seem to be the only one as well.* (Dunedin, high income, female)

> [Is your husband the same as you?] *He has learnt because he has been told and nagged.* (Whakatane, high income, female)

> [Do you manage your power use at all or think about it?] *Yes we do. I was just thinking with what you suggested that one is perhaps more frugal than the other in terms of the relationship and there is a suggestion of that, certainly my wife is better with money than me. She made me more aware of energy saving measures.* (Auckland, high income, male)

Of those in the quantitative survey that claimed to make an effort to manage their power usage, by far the most common way of doing so was to turn off the lights with almost three quarters (73%) citing this. The next most common way to manage usage was by turning appliances off at the wall, cited by 45%.

All other ways of managing power usage were cited by far lower proportions of respondents who claimed to make an effort to manage power usage. Less popular ways of managing power included shorter showers (16%), using energy efficient light bulbs (12%), heat pumps (11%) and energy efficient appliances (10%). Installing insulation and limiting the use of the drier were cited by 9%.

WAYS OF MANAGING POWER USE	
What do you do to manage your power use?	
	2013 %
Turn off lights	73
Turn appliances off at the wall	45
Shorter showers	16
Use energy efficient light bulbs	12
Have a heat pump	11
Have energy efficient appliances	10
Installed insulation	9
Limit use of drier	9
Have a wetback on fireplace	7
Use alternative heating sources or restrict heating	4
Use solar power	3
Use cold water more (e.g. only cold in the washing machine)	3
Use appliances less	3
Put in double glazing	2
Limit hot water usage (e.g. in the shower)	2
Other	3
Unsure	1

NB: Multiple response question means percentages may add to over 100%
Base: Respondents that claimed to make an effort to manage power use; n=459

In the focus groups, many said that they had been brought up to turn lights off. They were now working at passing this energy efficient behaviour on to the next generation.

> *I was brought up in the era where my dad used to say turn the light off after you leave the room so that is my habit.* (Whakatane, low income, female)

> *I am drumming it into my son after my dad drummed it into me as well. "Turn off the lights".* (Auckland, high income, female)

> [Do you consciously manage your energy use?] *I was brought up that way, you always got wrapped over the knuckles if you walked out of the bedroom and didn't turn the light off, you don't leave lights on so that I follow through ... But when we have the grandkids to stay I always run around and turn off the lights behind them.* (Whakatane, high income, female)

Turning appliances off at the wall was a more recent behaviour change that many in the focus groups also indicated they were doing to conserve power. Participants had heard about how power could be saved through 'switching off' at the wall from either their power company or from talking with friends. Participants engaged in this power saving behaviour had generally noticed reasonable power savings.

> *We took a few tips off the suppliers website and one of the things we started managing was the number of appliances on standby so we turn off the TV and stereos and all the electric equipment. We turn them off at the wall each night.* [Is that a hassle?] *No it is just a couple of plugs next to each other. So from what we read you save quite a few units by knocking off all the stand by stuff.* (Dunedin, high income, male)

A lot of your standby power is about 8% of your total bill now so that is with your clocks, things that aren't being used, TV, amplifiers, you can switch them off. [How do you know that, is that from the meter you have got?] *Just read it.* (Whakatane, high income, male)

Trying to convince teenagers to have shorter showers was a constant challenge for some parents in the groups.

Limit the showers otherwise they could be in there 12 hours a day. Knock, knock "hurry up, time to get out". A teen and two 9 years old and a husband who all love the shower. (Dunedin, high income, female)

I did mention that the power bill goes up when my son comes home but we have an understanding and he realises that after about 4-5 minutes the gas just gets switched off outside. We don't discuss it but it is a relationship he understands and I understand. I just wish he would do it before I switched off the gas. (Whakatane, high income, male)

In the quantitative results, the most common reason given by respondents who did not make an effort to manage power usage was that it simply was not a priority, cited by 39%. Two other popular reasons were a lack of time (16%) and that the power bill is not very expensive (15%).

Less common reasons given were a lack of information on energy efficiency (5%), not being able to afford to, limitations due to renting and that they have limited ways to manage usage (3%). Another 3% mentioned it is not an effort to manage their power as it just comes naturally to them.

REASONS FOR NOT MANAGING POWER USE

Why don't you make much effort to manage your power use?

	2013 %
Is not a priority for me	39
Lack of time	16
Power bill is not very high	15
Lack information or awareness of energy efficient tips	5
Can't afford to	3
Renting so am limited in what I can do	3
It's not an effort to manage power, it comes naturally	3
Uses what is required/limited ways to manage usage	3
Likes to live comfortably	2
Lives with others that makes management impossible	2
Other	3
Unsure	9

NB: Multiple response question means percentages may add to over 100%
Base: Respondents that claimed to not make much effort to manage power use; n=204

There were several focus group participants who rented and complained about how their hands were tied when it came to making significant energy efficient changes such as insulation and heating options which were decided on by landlords.

My one is between $190 to $300 depending on the weather. The heating eats up all the electricity. My house is not efficient with heating so in winter it is $360. [Are there things you can do to manage that?] *We can't because our landlord doesn't want to do*

> *anything for that so we have to leave it like that. We have asthmatic children so we have to have heating. We hardly watch TV. We have a dryer but we hardly use it.* (Auckland, low income, female)

> *I am with Genesis Energy and they keep going on that you have to do this survey and we will help you find tips and there are things like insulate but I am not going to spend $5000 insulating the house when the landlord is going to say great it is insulated give me another $20 a week rent. And I can't take that out* [the insulation] *so that is now a gift. And I can't put in heat pumps just because I want to because again I would have to get permission from the landlord. So most of the tips are great if you own but not if you rent. The landlord says if you pay for it you can have it.* (Dunedin, low income, rural, male)

There were some calls for energy saving tips more tailored towards those who were flatting. This student said he tried to encourage his flatmates to all socialise in one main room to save on having lights on and heating the whole house.

> *Something for a flat situation would be good because you don't really have control over the physical changes you can make. So I guess some individual tips, more information about those.* [Have you found things that have helped for you guys, you talked about being more social and hanging out in the lounge?] *Yes the heat pump thing worked because trying to convince everyone to socialise and stay in one room because obviously all the lights in the house are off apart from the ones in the main area which definitely saves energy. You don't want to leave the nice warm social room to go and sit in your little tiny room with the heater on.* (Dunedin, high income, male)

3.3 Taking steps to further manage power use

The majority of respondents were interested in monitoring power usage (62%), with 32% expressing a strong interest. One in five (21%) had a neutral attitude towards monitoring usage.

A minority expressed a lack of interest in monitoring power usage (16%) with only 7% claiming they were not at all interested.

Those aged 30-44 were more interested in monitoring power usage (67%) than other groups and those 60 years of age and over were less likely to be interested (53%). Māori, Asian (70%) and Pacific peoples (68%) were all more likely to express an interest in monitoring usage.

Those that claimed to make an effort to manage usage were significantly more likely to say they were interested in monitoring usage (76%).

INTEREST IN MONITORING POWER USAGE	
Using a 1-5 scale where 1 means 'very interested' and 5 'not at all interested', how interested are you in monitoring your power usage?	
	2013 %
1 – Very interested	32
2	30
TOTAL INTERESTED	**62**
3	**21**
4	9
5 – Not at all interested	7
TOTAL NOT INTERESTED	**16**
Unsure	1

Base: All respondents; n=1000

In the focus groups, interest around monitoring power usage mainly stemmed out of participants desire to have a more 'real time' overview of their power use. Several recounted stories of having significant jumps in their power bills when either an appliance malfunctioned or one member of the household unknowingly used an excessive amount of power.

> *Our hot water cylinder jammed on and it was boiling the whole time and we got an $1,100 power bill one month and they let us pay that off.* (Dunedin, high income, male)

> *We were renting a place and it was a nasty little damp house and my 17 year old daughter we didn't know she had found the old 3 kilowatt heater and we also didn't realise that Nova had done estimates for four months and when we got the power bill for $1,400 we knew. In fairness to my daughter nobody had said a thing to her, she had a cosy room.* [You obviously read your bill every month?] *I don't do it monthly, I don't want to sound anal but it is probably more of a listening watch than a controlling interest. I can look at the trend here and I can see school holidays, school holidays.* Whakatane, high income, male)

Participants wanted to be able to quickly identify if there was a surge in their household power consumption. This information would allow them to more proactively monitor their power use instead of having to bear the burden of an excessive power bill after the fact.

> *Perhaps now they have got the smart meters they could warn you if your electricity suddenly went high. That would be really useful because sometimes heat pumps can break down and go into heater mode. Just like your bank can sometimes call you if you have a very unusual transaction that would be useful.* (Dunedin, high income, female)

> *What she was saying that would be brilliant if it could sit inside your house or you could rent it. If it is telling you what is taking most of your power at least then you would know what not to use.* (Auckland, low income, male)

An ongoing monitoring system would also soon alert you to the household activities that consumed the most power.

> *My husband is terrible so if you had something inside that told him each time he boiled the jug for the third time because he has let it go cold, "honey that actually used quite a lot of power", "no it doesn't" – but it actually does. So if you had something inside that showed like a meter you could purchase if you wanted to. Not expensive so people would buy it and it would make you more aware that "shoot that uses a lot of power so I will be more careful".* [How much would you be willing to spend on that?] *$100 would probably be about what it costs and I might consider it.* (Auckland, low income, female)

A few participants were using technology such as GEM to monitor their power usage on a real-time basis. They noted having this monitoring system allowed them to have a much clearer sense of their power consumption and what they needed to do to live more efficiently.

> *You get the GEM and it shows you weekly day by day which is the high and low and it is pretty easy to follow. That at least gives you warning the last few days we have used quite a bit, what is going on. Then you can control it. But if it comes out monthly you think "oh well next month I will do better".* (Auckland, low income, male)

3.4 Willingness to engage in further energy efficiency behaviours

In the quantitative survey we tested how willing respondents would be to undertake a range of energy efficiency steps. The majority of them were willing to or already engaging in most of the energy efficiency steps. At least one in ten were already engaging in most of the steps and about two in five were willing to take most of the steps tested.

The measure the largest proportion of respondents (49%) were willing to manage power use by using as little power as possible by doing such things as turning of lights or taking shorter showers, over a quarter (28%) said they were already undertaking this step and only 9% said they would not be willing to manage usage in this way. Older respondents were far more likely to declare they were already engaging in this behaviour (34% of those 60 years and older compared to 13% aged under 30 years); however, 53% of those under 30 declared they would be willing to manage usage by trying this out.

A similar proportion said they would be willing to ensure they are using the best type of electricity for their needs (47%), though only 12% were already engaging in this behaviour.

The step the third largest proportion were willing to follow was carefully monitoring their power usage with 45% reporting they would do this and 11% already doing it; 16% were not interested. The steps involving regularly reviewing electricity plans and continually reviewing relevant information to help manage power use had very similar results with around one in 10 already doing them and two in five willing to do them (41% and 40% respectively); just over one in five were not willing to engage in these behaviours.

Two ways of managing power usage were tested that had large minorities not willing to follow them. The first was switching power providers to get the best deal. This step had 11% already doing it and 39% willing to do it; however, it also had 30% state they were not willing to explore this option. The second was installing renewable energy options like solar; this was the only measure to have more respondents not willing to follow it than follow it. Almost two in five (38%) respondents said they were not willing to install renewable options compared to 34% that would; additionally, only 4% currently had renewable options installed.

WILLINGNESS TO TAKE STEPS TO MANAGE POWER USE

Using a scale of 1-5 where 1 means you would be 'very willing' and 5 that you 'wouldn't be willing at all', how willing would you be to take the following steps to manage your power use. Remember, you can use any number between 1-5. If you are already doing the following or they are not applicable to your circumstances please just say so.

	Already doing %	1 Very willing %	2 %	TOTAL WILLING (1+2) %	3 %	4 %	5 Not willing at all %	TOTAL NOT WILLING (4+5) %	N/A %	Unsure %
Use as little power as possible by doing things such as turning off lights, taking short showers	**28**	31	18	**49**	**14**	6	3	**9**	-	-
Ensure I'm using the best type of energy for my needs such as gas, electricity or other types	**12**	26	21	**47**	**20**	8	7	**15**	6	-
Carefully monitor my power use	**11**	22	23	**45**	**26**	9	7	**16**	2	-
Regularly review the electricity plan or rate I'm on	**10**	21	20	**41**	**22**	12	10	**22**	4	1
Continually seek and review relevant information to help me manage my power use	**7**	20	20	**40**	**28**	13	10	**23**	2	-
Install energy efficient measures such as insulation	**37**	29	11	**40**	**7**	3	4	**7**	9	-
Switch power providers to get the best deal possible	**11**	24	15	**39**	**16**	12	18	**30**	3	1
Install renewable energy options like solar	**4**	23	11	**34**	**12**	14	24	**38**	11	1

Base: All respondents; n=1000

3.5 Current sources of information on power use

The predominant source of information regarding managing electricity usage, by a margin, was the internet with 63% of respondents citing it, including references to Google and other search engines.

The only other source mentioned by a notable proportion of respondents was a power company website at 18%. Four sources – the EECA, Consumer NZ, Powerswitch and friends or family were all cited by 3% of respondents.

SOURCES OF INFORMATION ON POWER MANAGEMENT

If you were looking for information on how to manage power or electricity use where would you go to find it?

	2013 %
General reference to Internet/Website/Search Engine/Google	63
Power company website	18
EECA (Energy Efficient and Conservation Authority)	3
Consumer NZ	3
Powerswitch website	3
Talk to friends or family	3
What's my number website	2
Power bill	2
Electricity Authority	1
The Government	1
The Power Board	1
Energywise	1
Other	5
Unsure	5

NB: Multiple response question means percentages may add to over 100%
Base: All respondents; n=1000

For most focus group participants when seeking information on how to manage their power usage the internet was their first port of call. While Google was the first place most would go to explore this topic, their power company website was strongly in the mix.

> [Where would you go to get information on saving power?) *Just probably my own electricity company or do a Google search on what is cheapest.* [Word of mouth?] *You hear things, it could be Facebook or someone you know and they will talk about their power or you hear from other people.* (Auckland, low income, female)

> *I would Google comparisons and What's My Number. Sometimes Consumer magazines are good for those comparisons and just discussing with people who are with different power providers.* [Have you done any of those things?] *What's My Number and online.* [Did you find it useful?] *Yes.* (Whakatane, high income, female)

3.6 Interest in further information relating to energy efficiency

Just under half (47%) of respondents said they would like more information about electricity use with the slim majority (51%) conveying a lack of interest in obtaining more information; 2% were unsure. Respondents 60 years of age and over were less likely to express an interest in obtaining more information about power usage (40%). Māori were slightly more likely to express an interest (53%) and Asians and Pacific peoples were far more likely (77% and 78% respectively). Those that had large bills – that spent over $200 per month were also slightly more likely to be interested in more information (52% that spent over $200/month in summer and 51% in winter).

WOULD LIKE MORE INFORMATION ABOUT POWER USE

Would you like more information about power or electricity use?

	2013 %
Yes	47
No	51
Unsure	2

Base: All respondents; n=1000

When those that would like more information were asked which information would be of interest, half (51%) cited power saving tips. Other information was much less sought after with under a quarter (23%) interested in the power usage of specific appliances and 12% interested in information that would help them get the cheapest bill or a direct comparison of different power company rates.

Other information that was less sought after included advice on efficient heating options (8%), advice on insulation (4%), advice on solar power (3%) and advice on monitoring power usage (3%).

INFORMATION WANTED

What information would you like?

	2013 %
Power saving tips	51
Power usage of specific appliances	23
Getting the cheapest bill/ comparison of companies' rates	12
Advice efficient heating options	8
Advice on insulation	4
Advice on solar power	3
Advice on monitoring our power usage	3
Information on smart meters	2
General information that's out there/ nothing specific	2
Other	8
Unsure	8

NB: Multiple response question means percentages may add to over 100%
Base: Respondents that said they wanted more information about power use; n=473

Some focus group participants had observed that power saving tips tended to be too generalised and did not necessarily provide enough detail about financial savings. Many wanted to know more about which specific appliances were the greatest users of power. Understanding which appliances were more power hungry would help them to adjust usage.

> [For an average household they can usually tell you what takes up the most power in a household.] *That would be useful.* [What would you do with that information?] *Take steps to see if there is any way I can improve it. If it is up there and that is the one I am using the most then what can I do about it.* (Whakatane, high income, male)

> *It would be interesting to know how much of your power bills goes into lighting or heating and others because I don't understand the difference between how much it costs to run the dryer and that is a bugbear in my life and how much it costs to switch the light on. I suspect that one is around 50 times what the other one is but I don't quite know. The comparison between different appliances would be interesting.* [Would you pay for that information?] *I don't know. Let's assume that I could save 10% of my bill then that information is worth 5%.* (Auckland, high income, male)

There were some calls for more specific information around dollar savings if certain energy efficient behaviours were adopted.

> *Most of mine would be through the internet these days because it is easy to get loads of information predominantly through industry sites, various government websites, although I have also found that a lot of that tends to be very generalised and in some cases too dumbed down.* [What is an example of that?] *Particularly where some of the text is very generalised, everyone can do this and it will save you huge amounts of money but they don't give you details if you change say from a globe to a compact fluorescent you would save on average $1 a day. It is only telling you that you will save lots of money and all of this energy but it doesn't tell me much. If they actually put it in dollar terms you can work out is it worthwhile should I buy it now or waiting until I have the $10 each.* (Dunedin, low income, rural, male)

There was some confusion among participants over the power consumption of televisions with some concerned that the the new big screen televisions could be becoming one of the more significant users of power in the modern household.

> [Energy efficient information?] *I think it would be interesting to see how much power TV's are using these days because it used to be the jug, the dryer, any water heating were the big ones and the TV was hardly anything. But now with the big screens.* (Whakatane, high income, female)

> *I think TV's use a lot and depends what sort of TV's you have got. I think the plasmas use a lot of power.* (Dunedin, high income, female)

There was also some confusion over energy efficient lighting options. Participants were unsure of the savings that different energy efficient lights would provide and wanted to know which lighting option was the best to go with.

> *So I am just curious to know with the halogens how much they would use.* [How would you use that information would you decide whether to change them all in your house?] *By the same token halogens haven't failed in five years. The cost to replace them you are going to take 3 or 4 years before you get a saving. So don't fix something that is not broken.* (Whakatane, high income, male)

In the quantitative findings the predominant reason for respondents who didn't want more information on power use was that they already had enough (65%). Lower proportions said they just weren't interested in receiving more information (21%) and that their bill was not high enough to worry (8%).

REASONS FOR NOT WANTING INFORMATION ON POWER USE

Why don't you want more information?

	2013 %
Already have enough	65
Not interested	21
My bill is not high/excessive	8
Other	7
Unsure	1

NB: Multiple response question means percentages may add to over 100%
Base: Respondents that said they did not want more information about power use; n=510

Understanding power bills

4.1 Comparing charges

Under half (45%) of respondents thought it was easy to compare what power companies charge for their services with 24% stating it was very easy. Just over a quarter (27%) thought it would not be easy to compare and just under a quarter (22%) were neutral on the issue.

Females were slightly more likely than males to think it easy to compare charges between companies (48% compared to 43%) and younger respondents thought it easier to compare between companies than older respondents (51% of those under 45 compared to 38% of those 60 years of age and over). Those that had changed power companies in the past two years were also more likely to think it easy to compare charges between companies compared to those that had not (52% compared to 43%).

EASE OF POWER COMPANY COMPARISON

Using a 1 to 5 scale where 1 is 'very easy' and 5 is 'not easy at all', how easy do you think it is to compare what power companies charge for the services they offer?

	2013 %
1 – Very easy	24
2	21
TOTAL EASY	**45**
3	**22**
4	13
5 – Not easy at all	14
TOTAL NOT EASY	**27**
Unsure	6

Base: All respondents; n=1000

The minority of respondents who thought it was not easy to compare charges between companies were asked why they thought this. The four main reasons given were that they have different plans and rates, mentioned by 28% of these respondents, followed by difficulty in understanding what you are being charged at 25% and a lack of transparent information at 22%. The fourth most common reason mentioned was that it was hard to find the information at 19%.

A notable proportion (14%) also thought comparisons were difficult due to there being no standard rate across companies. All other reasons were mentioned by 2% of respondents or less.

REASONS FOR DIFFICULTY WITH COMPARING POWER COMPANY CHARGES *Why is it difficult to compare what power companies charge for the services they offer?*	2013 %
Different plans and rates	28
Difficult to understand what you are being charged	25
Lack of transparent information	22
Hard to find information	19
No standard rate across companies to compare	14
I've never looked into it/ don't know how	2
The rates charged fluctuate	2
It is too time consuming	2
Other	5
Unsure	5

NB: Multiple response question means percentages may add to over 100%
Base: Those that claimed it is not easy to compare what power companies charge; n=264

When asked for suggestions to make comparing charges between companies easier, the most popular response was to provide a standard comparable rate across power companies (30%), followed by more transparent information (25%) and an independent website comparing rates across companies (20%).

SUGGESTIONS TO MAKE COMPARING POWER COMPANY CHARGES EASIER *What would help make it easier to compare what power companies charge for the services they offer?*	2013 %
A standard comparable rate across power companies	30
More transparent information	25
Independent website comparing rates	20
Make the information stand out (advertising, letter drops)	3
More detailed information/ better breakdown of charges	3
Simplify the information	2
Talking to a person about it	1
Other	4
Unsure	18

NB: Multiple response question means percentages may add to over 100%
Base: Those that claimed it is not easy to compare what power companies charge; n=264

4.2 Clarity of power bills

There was a moderate level of concern about how clearly information on electricity charges are outlined in power bills with 45% expressing concern overall and almost quarter (24%) expressing strong concern. A large proportion (31%) was not concerned and smaller proportions (23%) were neutral in their level of concern about the clarity of their power bill.

Males were more concerned than females about how clear information on electricity charges is outlined in their power bill (49% compared to 41%). Asians were also one of the most concerned groups of people (70%).

When looking at the power companies specifically, Mercury customers were the most concerned (49%) and Contact customers were the least concerned (39%).

Despite this mixed concern, a large majority of respondents were satisfied that bills from their power company were easy to understand (78%) and contained all the information they needed (76%), with 48% very satisfied their bills are easy to understand and 44% very satisfied all the information they needed is there. Only 7% of respondents were not satisfied with their power companies on these accounts.

CONCERN WITH CLARITY OF POWER BILL

Using a 1 to 5 scale where 1 means 'very concerned' and 5 means 'not concerned at all', how concerned are you about how clearly information on electricity charges are outlined in your power bill?

	2013 %
1 - Very concerned	24
2	21
TOTAL CONCERNED	**45**
3	**23**
4	15
5 - Not concerned at all	16
TOTAL NOT CONCERNED	**31**
Unsure	1

Base: All respondents; n=1000

EASE OF UNDERSTANDING POWER BILLS

Using a 1-5 scale where 1 means 'very satisfied' and 5 'not at all satisfied', how satisfied are you with your power company on the following?

	1 Very satis. %	2 %	TOTAL SATIS. (1+2) %	3 %	4 %	5 Not at all satis. %	TOTAL NOT SATIS. (4+5) %	Unsure %
Bills are easy to understand	48	30	**78**	13	4	3	**7**	2
Bills have all the information I need	44	32	**76**	15	4	3	**7**	2

Base: All respondents; n=1000

The focus group findings go some way to explaining why there is mixed concern about the clarity of power bills among survey respondents, yet they remain mostly satisfied that their bills are easy to understand and that their bills have all the information they need. While there may be some concern about clarity of power bills, there was little appetite for a more detail power bill as generally bills were viewed as fit for purpose and a more comprehensive bill was viewed as unnecessary.

When it came to power charges participants only really wanted to know what the amount owing was.

> [Would others like more transparency?] *I don't think it really matters. The point of interest is really how much you have got to pay.* (Dunedin, high income, male)

> *Sometimes a lot of information is more difficult to read, this is a simple bill, at the end of the day I am of the mindset that I don't have a choice how that bill is made up, that is what is required of me to pay so give me a final figure.* (Whakatane, high income, male)

> *I think there is far more information than what you need. Basically it is the bill at the bottom every month that I worry about.* (Dunedin, low income, rural, male)

This was largely because participants in the focus groups said that they already had many other things to occupy their days.

> *Petrol we don't agonise over and say I wonder what they are charging for this, this and this we go great it is 10 cents cheaper here I am filling up my car here. We are too busy to think this much.* (Auckland, low income, female)

> [More detail on charges?] *If you have time to do that you need a hobby.* You would be *looking into a lot of stuff if you were looking into that.* (Whakatane, high income, male)

> *Part of me says I want more information but to be honest after three months I would just be checking the price again.* (Whakatane, low income, male)

There was a sense in the focus groups if they really wanted more clarity on power bill charges they could find the information for themselves on the Internet.

> [But you don't think there is any need to put more detail on your bills?] *No I am of the view that my bill month to month is what I need to know and if I went on to the internet there would be a thing you could click on and go there is more information for when I want it.* (Dunedin, high income, female)

> *My own feeling is that there is a lot of information already available for people who want to go and seek it out and I have a suspicion that most recipients of power bills would not seek it out they just want to get something they were comfortable with.* (Dunedin, high income, male)

Even if more detailed information on charges could be provided participants were unsure how it would be beneficial for them. They viewed the charges that their provider passed on to them as something they were powerless to do anything about and therefore saw no real value in being provided more detailed information.

> [Do you ever hear about lines companies reducing their charges at all? Never. So you can't see any value in having that split out?] *Yes I guess what I figure is that it is a third party one step back from my energy provider so that cost would be to Nova or Tiny Mighty, I don't see how I can go through to get that changed. I would feel powerless in that regard.* (Whakatane, high income, male)

This suggests if additional information was provided to consumers this would also need to be accompanied with an explanation of how they could use the information to their advantage.

There was also a sense that the dollar or cent amounts that would be different between the bills on the separate charges would be so small it would not be worth even thinking about.

> [Increased transparency so you can compare the different charges that make up your total bill?] *On a domestic basis the percentages are relatively small. When you are using as much power as Coastlands uses that 1.5% does make a difference and that is why those accounts look different.* (Whakatane, high income, male)

> *I think there are hidden costs in there and they have called it something but you have to pay it anyway and if you compare it to another company you might save $5 - $10 a month.* (Dunedin, high income, female)

Some noted that if they could access more detailed charge information it would take considerable effort for them to then compare all the extra detail with other provider details to see if there was an advantage to be had by changing provider. They would need to be able to view older bills as well in order to be completely across the price changes.

> *You would have to be watching your old bills to see that trend as well. There is quite a lot of work if you are going to have three or four lines of all of those things.* (Whakatane, high income, male)

> [Do you want more transparency on charges in your bill?] *I think I would if I could also see other companies. It is all well and good if they tell me my bill but you would like to see other bills so you can compare the rates. If they tell me what it means to me that is whatever but it is more important if I can go this is so many cents for this bill what is it for this company.* (Dunedin, low income, rural, female)

It was suggested that the process of comparing would need to be made very easy such as pointing out exactly where movements in price had occurred or else consumers would most likely miss any changes in price.

> [Having more transparency on your bill around how much you are paying would that help you make calls in terms of which company you are more likely to go with?] *It would only be useful if someone knocks on your door and can provide that same information so you can compare.* (Dunedin, high income, female)

> [Maybe the lines charge has gone up or maybe the distribution charge maybe it is the metering charge, would it be interesting to have your bill set up in a way that you could pin point exactly where that increase has come from.] *It would have to be displayed as this has gone up otherwise you wouldn't know.* (Dunedin, high income, male)

However, some did like the idea of being able to access the information. In these cases they suggested it would be best if they were told how they could access the more detailed information (a link off their power bill was preferred). In this way it was up to them to research it when they felt they needed to rather than having it regularly on their bill.

> *I think it would be the same as we said before to have it available when you wanted to review it. So you wouldn't necessarily have that information every month but if you*

wanted to you could click on the thing like Ian said and have the information. (Dunedin, high income, female)

Having something on the internet that is easily available on your power bill and you just click and they can show you the information that would be the easiest and best way. Just when you want to compare it, maybe when you are thinking about switching. (Dunedin, high income, male)

4.3 Improving the clarity of power bills

Out of 7% of respondents that were not satisfied their power bills are easy to understand, the one reason that stood out was difficulty in understanding what the different charges mean, cited by 62% (just over 4% of the entire sample). All other reasons had a far lower number of mentions with the next most cited being difficulty understanding how the bill is calculated (9%), the bill layout (6%), that wording is too complicated and that there isn't enough information both on (4%).

REASONS BILLS ARE DIFFICULT TO UNDERSTAND

What is difficult to understand in your bill?

	2013 %
Don't understand what the different charges mean	62
How the bill is calculated	9
The bill layout	6
Wording too complicated	4
Not enough information	4
Other	11
Unsure	4

NB: Multiple response question means percentages may add to over 100%
Base: Those that were not satisfied bills are easy to understand; n=73

Out of the small minority of respondents (7% again) that were not satisfied their power bills have all the information they need, the two main things they would like to see included are explanations of the details or simpler bills and a breakdown on what power is used for in the home (cited by 19% and 17% respectively).

Other details respondents would like to see included are a breakdown of the times power is used and the charge per unit used (12%), actual usage rather than estimates (7%) and information on reducing power usage (6%).

INFORMATION MISSING IN POWER BILLS *What information is missing in your bill? What would you like to see?*	2013 %
Needs to be simpler or have explanations	19
Breakdown on what power used for (e.g. water heating)	17
Breakdown of the times power used (e.g. by day or hour)	12
How much is charged per unit	12
Actual usage, not estimates	7
Information on reducing power usage	6
Better clarity/transparency	3
History of payments/usage	3
Would like to compare different plans	1
Other	9
Unsure	13

NB: Multiple response question means percentages may add to over 100%
Base: Those that were not satisfied bills have all the information they need; n=75

4.4 Current power bill behaviour

Almost everyone (92%) pays their bill early to get a prompt payment discount and the vast majority (85%) pay electronically. Almost all respondents indicated that they tended to open each power bill with 82% declaring that the statement, 'I often don't even open my bill' did not apply to them.

Respondents were polarised on other behaviours with 48% stating they only looked at the dollar amount they need to pay and 50% reporting this statement did not apply to them. Two in five reported they only get an online bill and 59% got something other than just an online bill.

Just over a third (36%) reported that they regularly review their billing information online.

POWER BILL BEHAVIOUR *Which of the following apply to you in regard to your power bill?*	Yes, applies %	No, does not apply %	Unsure/Not applicable %
I always pay early so that I get the prompt payment discount	92	5	3
I pay electronically (e.g. direct debit, automatic payment, credit card, internet banking etc.)	85	15	-
I only look at the dollar amount I need to pay	48	50	2
I only get an online bill	40	59	1
I regularly review my billing information online	36	62	2
I often don't even open my bill	15	82	3

Base: All respondents; n=1000

In the focus groups, participants indicated they paid scant attention to their power bills. Most just wanted to see what they had to pay and how that compared to the previous month. Interest sparked and the bill was explored in more detail if the amount owing appeared to be out of keeping with what they expected for that time of the year.

> [Who actually reads their power bill?] *No I just see how much it is, throw it in the corner and say right I have to pay that when I am ready.* (Auckland, low income, male)

> [Who pays any attention to their power bill?] *I look at the graph thing but that is about it. Just the kilowatts per hour.* (Dunedin, high income, male)

> [Do you look at your bill in depth?] *Just the amount owing and I will take a glimpse at the graphs.* [What are you thinking when you look at the graph?] *It is probably just that interest of seeing if something unusual is happening and that would be about it.* [What would you do if there was an unusual spike?] *I would have to in my mind be able to connect that to something. So if I could see if we had visitors for a week but if I couldn't, if it was $40 - $50 I would be thinking ooh I didn't like that and would probably just see what next month did. And if then I would probably start making some inquiries if it continued to stay high. I think we all know the range we are expecting in our bills so if it was outside of that.* (Whakatane, high income, male)

Additional information

5.1 Information about power companies

Information concerning pricing was the type of information respondents expressed the strongest interest in with over two thirds (67%) saying they were interested in a benchmark rate that could be used to compare pricing across companies and only 11% not interested in this type of information. There were moderate levels of interest in how power companies operate with half declaring interest in sources of generation and views of their customer service (51% and 50% respectively). Just under half (45%) wanted to know more about their sponsorships and community contributions.

There were lower levels of interest in the ownership structures of power companies with 39% declaring an interest in this area.

INTEREST IN INFORMATION ABOUT DIFFERENT POWER COMPANIES

And using the same 0-10 scale where 0 means 'not at all interested' and 10 means 'very interested', please rate how interested you would be in the following information on the different power companies?

	0 %	1 %	2 %	3 %	TOTAL NOT INTERESTED (0-3) %	4 %	5 %	6 %	NEUTRAL (4-6) %	7 %	8 %	9 %	10 %	TOTAL INTERESTED (7-10) %	Unsure %
An effective rate paid which would provide a common benchmark rate to compare pricing across power companies	5	2	2	2	**11**	2	12	7	**21**	12	18	9	28	**67**	1
Sources of generation	9	4	6	4	**23**	4	14	7	**25**	12	14	6	19	**51**	1
Views of customer service	8	3	4	4	**19**	4	19	7	**30**	12	15	5	18	**50**	1
Sponsorship and community contribution	8	4	6	6	**24**	5	19	7	**31**	11	11	6	17	**45**	-
Ownership structure	13	7	8	5	**33**	5	16	6	**27**	9	12	5	13	**39**	1

Base: All respondents; n=1000

5.2 How information will be useful

The largest proportion of respondents that expressed interest in information about different power companies reported they would use this information to help them select a new provider (44%), with half as many (21%) reporting it would be to check if they had the best deal.

Another notable purpose was to satisfy personal interest or curiosity, cited by 16%. All other ways of using this information were cited by 5% of respondents or less.

PURPOSE OF INFORMATION ON DIFFERENT POWER COMPANIES

What would you use this information for?

	2013 %
To help me select a new provider	44
To check if I'm getting the best deal/compare companies	21
For personal interest/curiosity	16
Find out how my company works, its performance and ethics	5
Find out what is being put back into the community	3
See where the money/profits are going	3
Find out where/how power is generated	2
Help reduce the power bill	2
See what makes up the cost of a bill	2
See who owns the companies	1
Would not use it	1
Learn more about the electricity industry	1
Other	2
Unsure	4

NB: Multiple response question means percentages may add to over 100%
Base: Respondents that expressed interest in information about different power companies; n=809

Focus group participants were clear that if they sought any additional information on companies it would be to use it to gain a better deal on the price they paid. For most there was no sense of loyalty to their power company.

> *Power is power, the only thing I have got to bargain with I think is price and if it was cheaper I would go there.* [You don't feel any loyalty to the company you are with?] *Not really.* (Whakatane, high income, female)

> *Each company has different charges so as consumers that information that gives us the ability to choose which company we want to be with. We might look over there and think the grass is greener with that company so I am going with them and so by providing that information it helps us make that decision.* (Auckland, low income, male)

> [What about the rest of you?] *Price. At the moment there is no such thing as loyalty.* (Auckland, high income, female)

5.3 Interest in information to be included in power bill

The information most respondents expressed interest in being included in their power bill tended to have more of a direct impact on them. The information most people were interested in were the different rates their company offers, with three quarters (74%) of respondents expressing interest overall and a third (34%) expressing strong interest. The other stand out piece of information that respondents were interested in (66% interested) was a graphic showing how usage compares with other similar households.

Retail charges and a link to the Powerswitch website had around two-thirds of respondents express interest with 17% of respondents stating they were not interested in any of this information.

While the four areas of information above have a closer direct impact on the consumer, other areas of information that had an indirect impact on the consumer by affecting the retailer were also tested. These areas of information – concerning various charges and the Electricity Authority levy – were of moderate interest to respondents. Wholesale charges were of interest to 56% of respondents, followed by metering charges (54%), distribution charges (52%), the Electricity Authority levy (52%) and transmission charges (50%). Between 22% and 26% of respondents were not interested in this information.

The area of information the lowest proportion of respondents were interested in was overhead charges with 44% expressing interest and 32% reporting they were not interested.

All areas of information had at least one in five respondents express very strong interest[1] in them.

[1] Respondents that chose 10 on a scale of 0-10 where 0 means ‘not at all interested’ and 10 means ‘very interested’.

INTEREST IN INFORMATION BEING INCLUDED IN POWER BILL

Using a 0-10 scale where 0 means 'not at all interested' and 10 means 'very interested', please rate how interested you would be in the following information being included in your power bill?

	0 %	1 %	2 %	3 %	TOTAL NOT INTERESTED (0-3) %	4 %	5 %	6 %	NEUTRAL (4-6) %	7 %	8 %	9 %	10 %	TOTAL INTERESTED (7-10) %	Unsure %
The different rates your company offers	3	2	3	2	**10**	2	8	4	**14**	10	20	10	34	**74**	2
A graphic showing how your usage compares with other similar households	7	3	4	3	**17**	3	10	3	**16**	9	16	10	31	**66**	1
Retail charges - that is the mark up the retail company charges	7	4	3	3	**17**	2	10	5	**17**	8	17	7	33	**65**	1
A link to the Powerswitch website which helps you compare competing deals	7	4	3	3	**17**	2	10	4	**16**	8	16	10	30	**64**	3
Wholesale charges - that is the wholesale cost of electricity which the retailer pays	9	5	4	4	**22**	3	13	5	**21**	10	14	6	26	**56**	1
Metering charges - that is the cost of the metering equipment	8	5	5	4	**22**	3	15	5	**23**	9	15	6	24	**54**	1
Distribution charges - that is the cost to transport electricity around your local area to your door	9	5	5	6	**25**	3	15	4	**22**	9	14	5	24	**52**	1
The Electricity Authority levy	8	4	6	5	**23**	2	14	5	**21**	10	13	5	24	**52**	4
Transmission charges - that is the cost to transport electricity from the generator to your local area	10	6	6	4	**26**	3	14	6	**23**	9	13	5	23	**50**	1
Overhead charges - that is the cost to run the retail business such as salaries, office costs, etc	12	8	6	6	**32**	4	14	5	**23**	8	11	5	20	**44**	1

Base: All respondents; n=1000

Many focus groups participants wanted more information about the range of rates their power company offered. Some were aware that there was the possibility of paying less for power at different times of the day or night. However, they were unsure of how to access these rates and whether there was some way that they could qualify for them.

> *From what I understand there are three rates and they can tell you and I think Nova use to do it, what the rates are in the day time and night time because you have three different energy periods.* (Whakatane, high income, male)

> [Is there any information you would like to have about electricity use or energy use that you don't necessarily have?] *We are in Auckland now but when we were in Tauranga our company provided us with not only our bill but our bill regularly had two or three options of schemes that you could switch to that were cheaper off peak or more flat rate which enabled ourselves to try and choose our rate.* [Would you use that now in the situation you are in?] *Possibly. We do change, as the kids get older the times that they use power during the day changes because they are active later at night instead of having kids when they were young having baths at 5.00 or 6.00 in the evening they are having long showers at 9.00 or 10.00 at night. So if there was more information around alternative schemes.* [Are your kid's girls or boys?] *Boys. They still have long showers.* (Auckland, high income, male)

> *The night hot water I discovered in some discussions with our neighbours about what was best, that wasn't pointed out at all* [From their power company]. *But it makes a very significant difference to your power bill.* [Any idea of how much difference it makes to you?] *We are a low user, when we had all day hot water, well you don't have all day because it is controlled and off most of the time, it goes at a low user rate of about 32 cents. I think night only hot water is about 12 cents a unit.* (Dunedin, high income, male)

Some participants were annoyed that their provider didn't freely communicate to them that there were better rates they could potentially access. Many were not aware that there were different rates available and they felt it was the responsibility of a fair provider to inform consumers of this. It was suggested that informing consumers of better rates would help to engender customer loyalty.

> *If I found out I was on a high tariff and when I ring up they say actually we can drop you down to this I would be annoyed that they hadn't told me. That is the sort of thing that would make me look at shifting. If I find I have given loyalty and I haven't been dealt with an upfront respect I will move tomorrow.* [So you actually think that should be out there already?] *I didn't know about it.* (Whakatane, high income, male)

> *They don't tell you these things. I didn't realise I could get a night rate on my hot water. I suppose if I went to the website and started looking around but I have never really had any cause to and I didn't know it was available. They should be encouraging me to think about it. Because if they don't and you see it somewhere else you are going to change power companies. People don't have the loyalty that they used to. And if there is an opportunity to change you will. And if they come back and say we will offer you $400 to stay they should have done that a year ago.* (Dunedin, high income, female)

Participants also talked very favourably about the graphs in power bills that enabled them to compare their power bill over the year. For many this was the key piece of information that they regularly referred to. However, there was a call to extend this information to more of a comparative tool so they could compare what their usage looked like to other similar households.

> *Mercury do a little graph and it is really good on the back, the water bill does it but it doesn't give you a month to compare it with, whereas the Mercury bill gives you what you used last September and what you used this September and that is really good.* (Auckland, low income, female)

> *I compare my consumption to the last couple, I find the graph interesting.* (Dunedin, high income, male)

A visual way of communicating information resonated with most participants and was especially important for those who struggled with reading.

> [Is there anything on your bills that you quite like?] *I like my graph.* [What is useful about that?] *I don't like reading so I can see what is happening.* (Whakatane, low income, female)

Auckland participants were used to the graphic[2] that appears on their water bills and suggested something similar to this would be useful to help them see whether they were a heavy consumer of power or not. The Auckland water rates graphic lets you know at a glance how your household water use compares to other similar sized households. When participants from other parts of the country were prompted on the water rates comparison concept most thought that a similar concept on their power bills would be valuable.

> *The other thing and the water company does this really well is on the back of their bill it shows you a chart of the average usage for a household with 1, 2, 3, 4, 5 people and it draws you an x and you can look at it and go oh we have a problem.* (Auckland, high income, male)

> [Something that came up in one of the other groups was that they like the idea of being able to compare themselves against other households? They do it on the water bills in Auckland where you can see how you compare with other household sizes?] *Definitely. I think that would be really valuable because it would be an incentive too. If you saw it and you were coming up to an 8 person family.* (Whakatane, low income, female)

> [What else would you like on your bill?] *Probably alternative plans and probably a history and an idea of comparatively against other households your size how high and low you are.* (Auckland, high income, male)

[2] The graphic on the Auckland City water rates bill shows a range of household sizes. Within each household size it provides a visual continuum ranging from low use to high use and plots on the continuum where your household sits. So at a glance you can see if your water use is comparable to a certain size household (in terms of people) and whether you would be classed as a low, high or average user for that sized household.

5.4 Timeliness of information

In the quantitative survey respondents who were either interested in information being included in their power bill or interested in information about different power companies were asked some questions about how they would best like to receive that information.

Almost half of respondents thought that additional information about power companies would need to be updated at least monthly to be of interest (49%), with the bulk of this proportion (41%) reporting monthly updates as the minimum.

The second largest proportion (29%) believed quarterly updates would be necessary and 13% thought biannual updates were necessary. Only 7% of respondents believed annual updates were enough for them to maintain interest in the information and 2% were unsure.

Males were slightly more likely than females to believe the information would need to be refreshed at least monthly to be of interest (52% compared to 47% of females). There was also a trend when comparing age groups with younger respondents believing the information would need to be more recent - 65% of respondents under 30 reported that the information would need to be refreshed at least monthly to be of interest compared to around half of those 30-59 and 40% of those 60 years and over.

Pacific peoples and Asians were also more likely to state that the information would need to be refreshed monthly (74% and 67%).

RECENCY OF INFORMATION NEEDED TO RETAIN INTEREST

You said you would be interested in some additional information - how up to date would that information need to be - would it need to be refreshed?

	2013 %
Daily	2
Weekly	6
Monthly	41
TOTAL: AT LEAST MONTHLY	**49**
Quarterly	29
Six monthly	13
Annually	7
Unsure	2

Base: Respondents that expressed interest in information being included in their power bill or interest in information about different power companies; n=920

5.5 Best way to provide information

There were two communication channels that had around a quarter of respondents cite them as the best way to provide information on electricity pricing. A separate standalone website was cited by 27% and via email by 25%. Males were more likely to prefer a website (31% compared to 23% of females) and females were more likely to prefer email (28% compared to 23% of males).

Three other notable channels were on the retailer's website (19%), information with the electricity bill (15%) and flyers (14%).

BEST COMMUNICATION CHANNELS

What would be the best way to provide people like you with additional information on electricity pricing?

	2013 %
On a separate standalone website	27
Email	25
On retailers website	19
Information with your electricity bill	15
A flyer	14
Mail	6
In newspapers	2
On social media such as Facebook	2
Through an APP	2
Phone consultant	1
Unsure	2

NB: Multiple response question means percentages may add to over 100%
Base: Respondents that expressed interest in information being included in their power bill or interest in information about different power companies; n=920

5.6 Usefulness of information on electricity prices

In the quantitative survey respondents were asked how useful a range of sources and types of information were on electricity prices. The most useful types of information were:

- A standard benchmark rate per unit of power, so you can compare prices with other power companies' with 75% indicating that this would be useful.
- This was followed by 73% of respondents who indicated that, 'an independent website that compares the prices of different power companies' would be useful.
- Also in the top three was, 'the different rate or plans offered by all the power companies on an independent website' (68% useful).

Respondents 30-44 years of age and those with household incomes over $100,000 were more likely to rate these top three sources of information as useful when compared to overall figures.

Fourth on the list was, 'your own electricity bill' with 65% of respondents indicating that this was a useful source of information on electricity prices.

The three types of information that received more moderate useful ratings included: ‘information on the different components that make up electricity charges on your power bill’ (60% useful), ‘tips for saving energy on your power company's website and links to other websites with similar information’ (58% useful), and ‘price trends for power companies over three years on an independent website’ (56% useful).

Around half of respondents indicated that information on: ‘a guide to understanding power bills on your company's website’ (51%), ‘Sample bills with an explanation of the different components on an independent website’ (50%), ‘a diagram explaining your power bill on a consumer website’ (49%) would be useful sources of information on electricity prices.

A mixed level of interest was expressed for ‘a quarterly report of domestic electricity prices on the Ministry of Business, innovation and Employment’s website’ (38% useful and 31% not useful).

USEFULNESS OF INFORMATION ON ELECTRICITY PRICES

Using a 0-10 scale where 0 means 'not at all useful' and 10 means 'very useful', how useful would you personally find the following information on electricity prices?

	0 %	1 %	2 %	3 %	TOTAL NOT USEFUL (0-3) %	4 %	5 %	6 %	NEUTRAL (4-6) %	7 %	8 %	9 %	10 %	TOTAL USEFUL (7-10) %	Unsure %
A standard benchmark rate per unit of power, so you can compare prices with other power companies	3	3	2	2	**10**	2	7	3	**12**	8	18	10	39	**75**	3
An independent website that compares the prices of different power companies	4	3	3	1	**11**	2	8	3	**13**	6	16	10	41	**73**	3
The different rate or plans offered by all the power companies on an independent website	5	3	2	3	**13**	2	8	5	**15**	6	15	9	38	**68**	4
Your own electricity bill	3	2	3	3	**11**	3	12	6	**21**	10	16	8	31	**65**	3
Information on the different components that make up electricity charges on your power bill	5	3	4	4	**16**	3	11	8	**22**	10	15	10	25	**60**	2
Tips for saving energy on your power company's website and links to other websites with similar information	6	4	3	4	**17**	3	11	7	**21**	9	17	7	25	**58**	4
Price trends for power companies over three years on an independent website	7	3	3	4	**17**	3	13	6	**22**	8	15	8	25	**56**	5
A guide to understanding power bills on your company's website	7	4	4	5	**20**	4	14	6	**24**	8	14	7	22	**51**	5
Sample bills with an explanation of the different components on an independent website	8	4	6	6	**24**	3	13	6	**22**	9	14	6	21	**50**	4
A diagram explaining your power bill on a consumer website	9	4	6	4	**23**	4	14	6	**24**	10	13	7	19	**49**	4
A quarterly report of domestic electricity prices on the Ministry of Business, innovation and Employment's website	10	7	8	6	**31**	3	15	6	**24**	7	11	5	15	**38**	7

Base: All respondents; n=1000

In the focus groups, we tested a similar range of information types and sources to explore how useful participants thought they would be. Similar to the quantitative results participants overwhelmingly nominated the concept of a standard benchmark rate (effective rate) as the most useful piece of information. Participants liked the idea of being able to compare 'apples with apples' when it came to power prices. It was noted that providers seemed to frame charges to consumers in a range of different ways which made it impossible to determine if you were getting a good price on your power.

> *I just want a number, at this place you pay 25, at this place you play 29.* [So the effective rate idea?] *Yes I think that is all you need. All the other gobble-de-gook confuses people. Even the bills amongst their own company are different.* (Whakatane, low income, female)

> [How hard do you think it is to compare between the different power companies and what they have to offer?] *It is difficult because you don't always feel like you are comparing apples with apples and that you are getting a market pitch. I like sitting at a table and seeing how that particular example they are giving compares to others. They tend to frame things in different ways.* (Whakatane, high income, male)

> [The effective rate a couple of you ticked that, what would you use that for?] *It is a good way to compare apples with apples across friends, family, companies, just seems a good thing to do and it is easy for us to land on one way of calculating everything across the industry.* (Auckland, high income, male)

Some liked the idea of being able compare your electricity charges in a similar way to comparing interest rates between banks. Having an effective rate published by power companies would enable consumers to much more easily decipher which company was the most competitive.

> *I like it with the bank how you know you are getting 4.95 and there you are getting 5.25. That is one number and you know what you are dealing with.* (Whakatane, low income, female)

> [Why did you choose the effective rate option?] *Just a comparison.* [How would you use something like that?] *Not that I have a mortgage but you are going to go to the bank with the lowest mortgage rate.* [So it tells you the best deal?] *Yes.* (Dunedin, low income, rural, female)

Participants also liked the idea of a stand-alone website that provided additional information on power companies as this would save them having to collate the information themselves. They did not want additional information, all the time, but would rather have the ability to easily access it when they felt they needed to, which would mainly be when they were thinking about switching power companies.

> *Having something on the internet that is easily available on your power bill and you just click and they can show you the information that would be the easiest and best way. Just when you want to compare it, maybe when you are thinking about switching.* (Dunedin, high income, male)

> [What would you want them to do to help you in that process?] *If they had a website that listed all the different rates that were available and had all the companies there, Contact, Meridian, Genesis, Mercury and that way you could look at it all on one site. Rather than have to go to the individual web sites.* (Dunedin, high income, female)

Participants felt that having a site that was government based would give the information more credibility and it would also be evidence of their levy being put to good use.

> [What about the best way to get this information to people, do you think on your bill is the best place?] *I think absolutely the best way is through the Electricity Commission actually providing it through the user website. The Electricity Commission doing its job and actually providing information on what these companies are charging.* (Dunedin, low income, rural, male)

> *I think the only thing that may need to change is the government agency it should be them that does it not the individual power companies. We are paying a levy for it and if the government is doing it, it has to be correct and more people probably believe the government than an individual.* (Dunedin, high income, female)

The idea of the information being provided in an electronic form, resonated with participants as this allowed for scope to dig deeper on topics that they were particularly interested in. The 'What's Your Number' website was mentioned as an example of an internet format that would work well for making this type of industry information available to New Zealand electricity consumers.

> *Maybe if you are getting it electronically you could click on the item itself if you wanted to see what it was made up of. It might have a figure x for your kilowatt usage and then you click on that particular item and you break it down for those who are interested.* (Auckland, high income, male)

> *Just somewhere on the internet like the What's Your Number thing.* (Whakatane, low income, male)

There was little interest in more specific information about the range of charges and where they were coming from. Most felt they didn't need to know how the company arrived at its overall charge. At the end of the day they just wanted to know what their total bill was and to be told it in a format that they could compare with another company.

> [Are others interested in that level of detail, would you be wanting to go and check it out?] *To me it is the bottom line, how much I am paying, doesn't matter how much they break it down the bottom line is how much I am paying.* [But you are also getting charged all those other charges as well?] *Yes I would personally they rather tell me per kilowatt included. I don't need to see how they get there because one is getting a wholesale rate and one has got overhead rates, I don't want to see that, I just want to know what I am going to pay for that at the end of the day and then I can shop around and say okay I pay 21 cents or 22 cents.* (Auckland, low income, male)

However, there were definitely some segments of participants who liked the concept of having access to more transparent information on how charges were made up. It was evident that before this could happen there would need to be more standardisation across the industry so consumers were able to make sense and use of the more detailed information.

> *I would say yes because having a more transparent account you can make some comparisons and when you talk about transparency every company has to be involved. I think the regulation authority has to have a formula that everyone knows and everyone understands that formula and then you can step into the arena and decide who you want and then you have valid reasons as to why you have made those decisions. At the moment we haven't got any reasons because they have all the reasons and they are not supplying us with them.* [You can't test that?] *No.* (Dunedin, low income, rural, male)

Power company relationship

6.1 Satisfaction with power companies

Overall satisfaction with power company service was high with two thirds of respondents expressing satisfaction and a quarter (24%) conveying a neutral attitude; only 8% said they were dissatisfied with the general level of service. Reported levels of satisfaction were lower for specific areas of service with about half satisfied with the provision of extra services and the value received for their money (49% and 48% respectively) and under one in five expressing dissatisfaction (16% and 19% respectively).

Females were more likely to express satisfaction with the overall level of service (70%) when compared to males (62%). Respondents that spend over $200 on their monthly bills were less likely to rate their level of satisfaction highly compared to those that spend less than $100 monthly - In summer, 75% that spend under $100 were satisfied compared to 56% that spend over $200 and in winter, 68% that spend under $100 were satisfied compared to 61% that spend over $200.

Those that make an effort to manage power were among those most likely to rate satisfaction highly (72% compared to 57% that do not), as were respondents that believe power companies are trustworthy in terms of offering the best deals (83% compared to 45% that did not think they were trustworthy).

STATEMENT TESTING: SATISFACTION WITH POWER COMPANY SERVICE

Using a 1-5 scale where 1 means 'very satisfied' and 5 'not at all satisfied', how satisfied are you with your power company on the following?

	1 Very satis. %	2 %	TOTAL SATIS. (1+2) %	3 %	4 %	5 Not at all satis. %	TOTAL NOT SATIS. (4+5) %	Unsure %
General overall service	31	35	**66**	24	5	3	**8**	2
The provision of extra services like online power usage information, energy efficiency services, other loyalty reward programmes	24	25	**49**	27	10	6	**16**	8
Value for money	22	26	**48**	28	10	9	**19**	5

Base: All respondents; n=1000

6.2 Trusting deals and offers

A large proportion was hesitant to label the big utility industries as trustworthy with the largest proportion (44%) giving neutral ratings for power and telecommunications companies for trustworthiness. A somewhat large proportion (37%) rated banks in the same way, though they were more likely to be rated trustworthy than anything else (44% compared to 17% that rated them not trustworthy).

Even so, more respondents labelled the utility industries as trustworthy rather than not trustworthy with 38% rating power companies as trustworthy compared to 16% that rated them as not trustworthy and 31% that rated telecommunications companies as trustworthy compared to 22% that rated them as not trustworthy.

TRUSTWORTHY SOURCES OF DEALS *Using a 0-10 scale where 0 means 'not at all trustworthy' and 10 means 'extremely trustworthy', how trustworthy are the following in terms of offering the best deals to you?*	0	1	2	3	TOTAL NOT TRUST-WORTHY (0-3)	4	5	6	NEUTRAL (4-6)	7	8	9	10	TOTAL TRUST-WORTHY (7-10)	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Banks	4	3	4	6	17	7	18	12	37	14	15	5	10	44	2
Power companies	3	3	4	6	16	8	24	12	44	15	13	2	8	38	2
Telecommunications companies	5	4	5	8	22	9	23	12	44	13	10	2	6	31	3

Base: All respondents; n=1000

In the focus groups it was clear that participants' relationships with their power company were much more removed than with other service providers.

> *The other thing is the banks have gone out of their way to make things easier for me in terms of statements, managing money and things like this, power companies just charge me.* (Whakatane, low income, male)

> *For me the bank is negotiable but this isn't. I have never paid mortgage fees, I have never paid bank charges because I have negotiated them out. These ones here I can't.* (Whakatane, high income, male)

6.3 Switching behaviour

The majority had not changed their power company in over two years, with over two thirds (68%) reporting they had not compared to 31% that had. Those between 30 and 44 years of age were slightly more likely to have changed power companies (35%), as were those that make an effort to manage their power usage (35%) and those that thought it easy to compare between power companies (36%).

There were no real differences between respondents' monthly bill expenditure and whether they had changed power companies in the past two years.

CHANGED POWER COMPANY IN PAST TWO YEARS

Have you changed your power company in the past two years?

	2013 %
Yes	31
No	68
Unsure	1

Base: All respondents; n=1000

Changing power companies was not a frequent occurrence with the large majority (80%) that had switched in the past two years having done so only once. Of the remaining respondents, 17% had switched twice and only 3% had switched more than twice.

Although the sample size for this subgroup is low and results must be interpreted with caution, the results suggested that younger people were less likely to change companies multiple times with only 5% of those under 30 changing companies more than once, compared to 20% of those 60 and over.

Those from Wellington and Auckland were also more likely to have changed multiple times (26% and 24% respectively), compared to the overall figures.

FREQUENCY OF CHANGING POWER COMPANIES IN PAST TWO YEARS *How many times have you switched power company in the past two years?*	2013 %
Once	80
Twice	17
3 or more times	3

Base: Those that have changed power companies in the past two years; n=314

There were two main reasons for not switching power companies. The primary reason was that respondents were content with the pricing of their current power company or were certain their current company would match any deal with 38% citing this as a factor. The second reason was that respondents were happy with the service they received from their current provider with 34% citing this as a reason.

The remaining reasons were all cited by less than 10% of respondents; the more important of them were that switching seemed like too much hassle (8%), they were too busy to investigate the best deals (7%), not trusting there would be real gains from switching and that offers were no cheaper (6%).

REASONS FOR NOT SWITCHING POWER COMPANIES *What are your main reasons for not switching?*	2013 %
Happy with price of current power company/current power company will match any deals	38
Happy with service from current power company	34
Switching seemed too much hassle	8
Too busy to investigate the best deals available	7
Did not trust there would be real gains from switching	6
Offer(s) were no cheaper	6
Lack of information on best deals available	4
Was already locked into a contract	4
Have not got round to looking into this	3
Other	10
Don't Know/Unsure	2

NB: Multiple response question means percentages may add to over 100%
Base: Those that had not changed power companies in the past two years; n=686

Respondents were also prompted with factors that may have prevented them from switching. While the majority felt these factors did not prevent them from switching, there were large minorities that felt they were a factor.

One factor was not having the information to be able to compare deals. Although half (49%) did not think this was a factor stopping them from switching (and 40% felt it was no issue whatsoever), 35% felt it was an issue and almost a quarter (23%) felt it contributed to them not switching a lot. Māori and Asian respondents were more likely to feel that not having information to compare deals was a factor preventing them from switching companies (49% and 42% respectively). A large majority of those that agreed that– not being able to understand the information and work out the best deal – was a factor in them not switching companies also agreed that not having the information needed to be able to compare deals (77%) was a factor in them not switching power companies.

The other factor tested was not being able to understand information and work out the best deal. Again, although over half thought this was not a factor in stopping them from switching (54%) and 43% felt it was no issue whatsoever, a large minority (28%) felt it was a facto and 17% felt it contributed to them not switching a lot. Again, Māori and Asian respondents were more likely to feel that not being able to understand information and work out the best deal had been a factor in them not switching companies (35% and 47%).

IMPACT OF INFORMATION QUALITY ON SWITCHING

Using a 1 to 5 scale where 1 means 'a lot' and 5 means 'not at all', how much were the following a factor in stopping you switching?

	1 A lot %	2 %	TOTAL 1+2 %	3 %	4 %	5 Not at all %	TOTAL 4+5 %	Unsure %
Not being able to understand information and work out the best deal	17	11	**28**	15	11	43	**54**	3
Not having the information to be able to compare deals	23	12	**35**	13	9	40	**49**	3

Base: Those that have not changed power companies in the past two years; n=686

6.4 Providers

Across the sample Genesis Energy had the largest customer base with a quarter (26%) of respondents' purchasing power from them. Contact and Mercury round out the top three with 20% apiece.

COMPANY IS A CURRENT CUSTOMER OF

What is the name of the company that you pay your monthly electricity bills to?

	2013 %
Genesis Energy	26
Contact Energy	20
Mercury Energy	20
Meridian Energy	10
TrustPower	8
Energy Online	4
Powershop NZ	3
Just Energy	2
Nova Energy	2
Energy Direct	1
King Country Energy	1
Tiny Mighty Power	1
Unsure/Don't know	2

Base: All respondents; n=1000

6.4.1 Total bills paid to providers

Respondents had cheaper power bills in summer with 74% spending under $200 per month, only 42% spent under this per month in winter. Another 47% spent between $200 and $400 per month in winter.

MONTHLY POWER BILL

As you know your power bill changes depending on how much you use and whether it is summer or winter. Taking this into account how much would you say your power bill each month in summer is:
And in winter would you say your power bill each month is:

	2013 %	
	Summer	Winter
Less than $100 a month	19	6
More than $100, but less than $200 a month	55	36
More than $200, but less than $300 a month	17	33
More than $300, but less than $400 a month	3	14
More than $400, but less than $500 a month	1	4
More than $500 a month	-	2
Unsure/Don't know	5	5

Base: All respondents; n=1000

6.4.2 Mix of gas and power

Just over a quarter of respondents had gas in their house, of those the small majority (61%) had it piped in. Three quarters had the same power company supply electricity and gas.

GAS SUPPLY

	2013 %
Does your house also have a gas supply?	***n=1000***
Yes	28
No	71
Unsure	1
Is your gas supply piped into your home or do you have LPG bottled gas?	***n=283***
Bottled	39
Piped into home	61
Do you have the same power company supplying electricity and gas to your home?	***n=173***
Yes	75
No	22
Unsure	3

6.4.3 Use of smart meters and online tools

Just over a third (36%) of respondents had smart meters and 57% had access to online tools that could help analyse their power usage. Of those that had access to online tools, 60% thought the tool was either useful, or expressed a neutral attitude towards them. A minority (22%) thought they were not useful and 18% were unsure.

HAVE A SMART METER

Do you have a smart meter? (That is a meter that is read remotely without needing someone to visit and read the meter manually).

	2013 %
Yes	36
No	56
Unsure	8

Base: All respondents; n=1000

ACCESS TO ONLINE TOOLS

Do you have access to online tools to analyse your power usage?

	2013 %
Yes	57
No	35
Unsure	8

Base: All respondents; n=1000

USEFULNESS OF ONLINE TOOL

On a 1 to 5 scale where 1 means 'very useful' and 5 means 'not useful at all', how useful would you say this online tool is?

	2013 %
1 - Very useful	19
2	18
TOTAL USEFUL	**37**
3	**23**
4	10
5 - Not useful at all	12
TOTAL NOT USEFUL	**22**
Unsure	18

Base: Those that have access to online tools; n=569

Segmentation analysis

7.1 Segmentation background

Additional segmentation analysis was carried out which resulted in segmenting the public into six clusters each with its own distinct behavioural profile, traits, demographic profile and interest in additional information. This extra analysis was conducted to uncover if there were certain segments of the population who held different levels of desire for more energy-related information, attitudes toward power use, and energy management behaviour.

In this section, we firstly introduce the segments by way of top-level overviews and then move towards a more detailed description of each group. Initially we show the size of each segment and then illustrate where they broadly sit on a linear diagram that summarises the demographics of each segment and illustrates in general terms where they sit on a continuum ranging from awareness/understanding to motivation and action. While this diagram oversimplifies a complex picture, it provides a useful starting point for the reader to begin to understand the six segments.

We then introduce each segment with greater detail. Each segment description follows the order outlined below:

1. Demographics and useful channels for information
2. Attitudes toward energy efficiency and declared behaviours
3. Interest in information
4. Power company relationship.

7.2 Overview of segments

The survey sample was segmented based on their energy efficient behaviour and desire for more information relating to the transparency of electricity bills. The analysis produced six segments which we labelled:

1. Receptive strivers
2. Uninformed strugglers
3. Wealthy cynics
4. Self-informed actives
5. Active Loyalists, and
6. Apathetic conservatives.

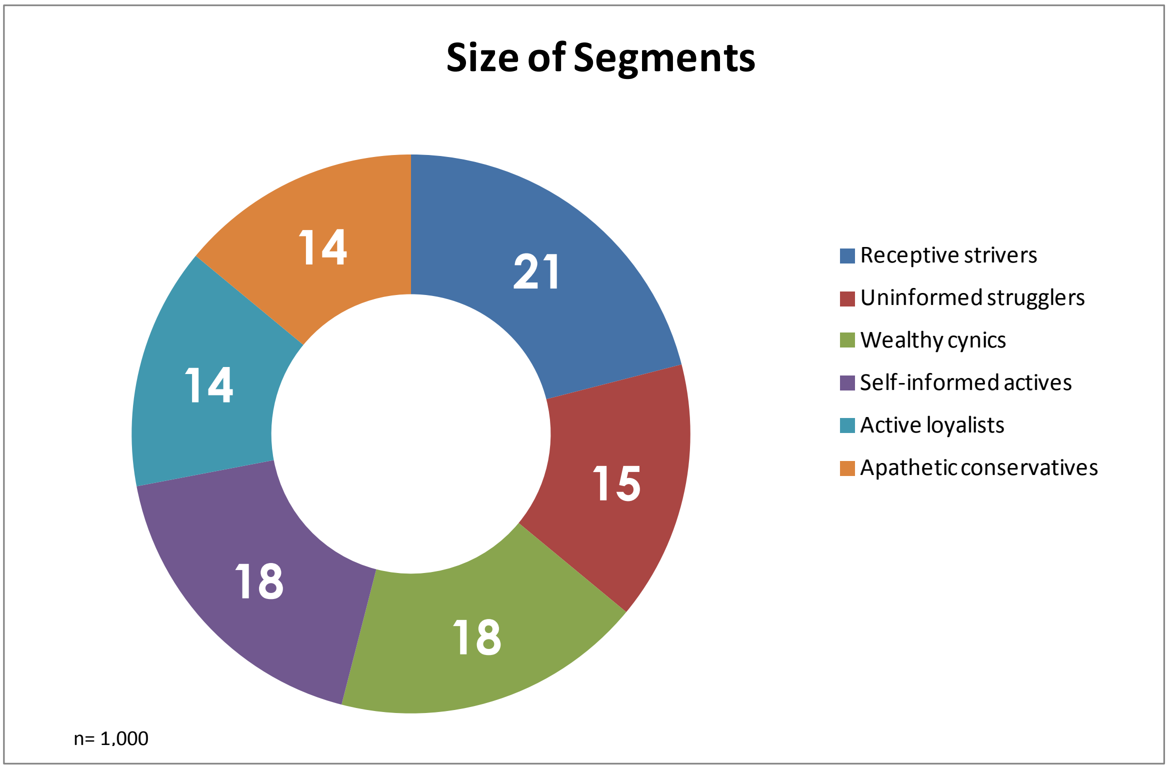
Out of the segments identified in this research the Strivers (21%) and the Strugglers (15%) which together make up over a third of the sample (36%) were most likely to be interested in more information. The Strivers were most willing across all segments to try a range of energy efficient measures and the most interested in receiving more energy-related information. The Strugglers who are the lowest income segment and least tertiary qualified claimed to be putting in the most effort to conserve power. They were more likely to want information about power use but less likely to want more detailed information related to energy charges. We suspect this is because they are more comfortable with understanding energy efficiency behaviours and less with getting their heads around the complex range of charges that make up their bills.

The Wealthy cynics (18%) are least likely to trust power companies and that service providers would provide them with the best deal. They are more likely than average to want power-related information and to think that price-related energy information would be useful to them. The Self-informed (18%) are most likely to declare being knowledgeable about how to manage power. They are less interested in additional power-related information. They are most likely to switch power companies, use online tools to review their power bill and are the most satisfied with their provider. This all suggests the Self-informed currently have all they need to get the best out of their power company.

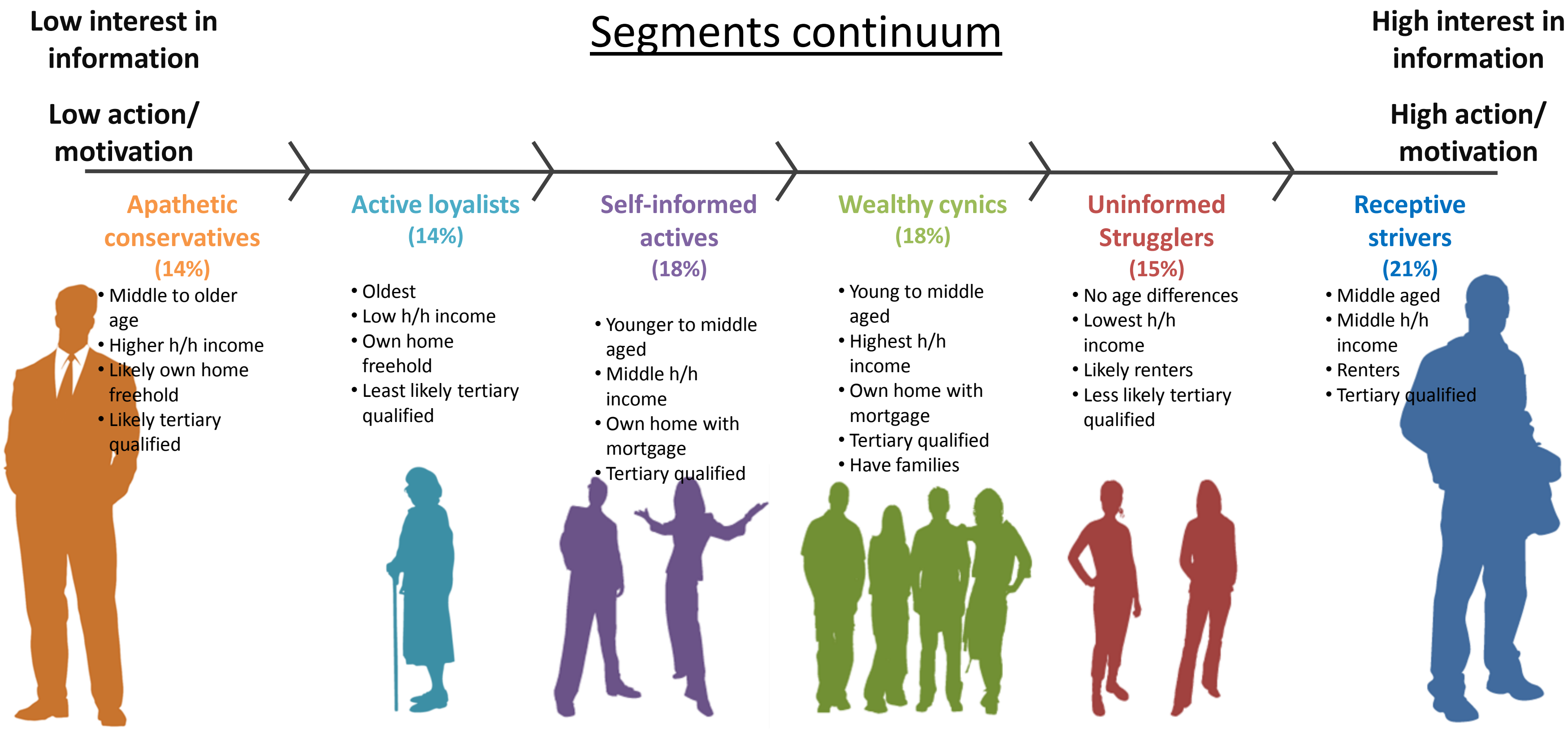
The Loyalists (14%) are our oldest segment, as the name suggests they are by far the most loyal group. This cluster is most likely to trust their power company and do the most they can to reduce their power use such as turning off lights and taking shorter showers. They are also less interested in additional information relating to power. Finally the Apathetic conservatives (14%) are a high-income group and are the least engaged with the ramification of their power use. They are putting in the least effort to manage their power bill; they are least likely to take actions to preserve the environment and are least interested in receiving additional information.

7.2.1 Size of segments

The following pie chart illustrates the percentage of the population that each segment makes up:



7.2.2 Continuum of segments



7.3 Segment details

7.3.1 Receptive strivers (21%)

Demographics - More likely to:

- Be 30-44 (50% compared to 41% of the general sample)
- Have a household income between $50K and $70K (21% vs. 15% of all)
- Be renting (33% vs. 26% of all)
- Be in full-time paid work (67% vs. 55% of all)
- Keep up with the latest technology (72% vs. 61% of all)
- Have a tertiary qualification (75% vs. 64% of all

Best Information channels

- Email (35%)
- On a separate standalone website (26%)
- On a retailer's website (21%)

A Distinguishing characteristic: 70% interested in power-related information compared to 47% of general sample

Summary: energy behaviour and Information interest

Across a range of energy efficiency measures the Strivers are most willing to take action and try the measures tested. Their desire to take action is most likely related to them being on middle incomes so there is a need to save money and being tertiary qualified there is the confidence that they can interpret and put into practice price-related energy information. They are the segment most likely to indicate that the range of more detailed energy bill-related information would be useful to them; they are also most likely to express an interest in monitoring their power use.

Detailed segment description

Middle-range electricity users (winter bill $200-$300 per month 49% vs. 33% of all).

Attitudes towards energy efficiency and declared behaviours

- Most likely to be interested in monitoring power usage (78% vs. 62% of all)

In terms of behaviour, they are generally less likely to already be engaging in behaviours that help manage power use; however, they also state they are more willing than other segments to start taking the steps tested to manage power use. The three steps they were most willing to engage in were:

- Use as little power as possible by doing things such as turning off lights, taking short showers: Slightly less likely to already be doing so (25% vs. 28% of all), but 57% were willing vs. 49% of all.
- Ensure I'm using the best type of energy for my needs such as gas, electricity or other types: Less likely to already be doing so (5% vs. 11% of all), but 59% were willing vs. 47% of all.
- Carefully monitor my power use: No real difference when compared to all for already doing so (9% vs. 11%), but 55% were willing vs. 45% of all.

Interest in information

Most likely to want more information about power usage (70% vs. 47% of all).

They had the highest level of interest in information about different power companies and information being included in their power bill.

For information comparing different power companies, this segment had the highest interest in all five pieces of information tested; the top three were:

- An effective rate paid which would provide a common benchmark rate to compare pricing across power companies (80% vs. 67% of all).
- Sources of generation (61% vs. 51% of all).
- Views of customer service (61% vs. 50% of all).

This segment was also more likely to state they were interested in information across the board when it came to information being included in their power bill. The three pieces of information with the most interest were:

- The different rates your company offers (88% vs. 74% of all).
- A graphic showing how your usage compares with other similar households (81% vs. 66% of all).
- Retail charges - that is, the mark up the retail company charges (79% vs. 65% of all).

Furthermore, this segment was more likely to rate information on electricity prices as useful. The three pieces of information rated as the most useful were:

- A standard benchmark rate per unit of power, so you can compare prices with other power companies (85% vs. 75% of all).
- An independent website that compares the prices of different power companies (84% vs. 73% of all).
- The different rate or plans offered by all the power companies on an independent website (82% vs. 68% of all).

Power company relationship

- Significantly less likely to have changed power companies in the past two years (17% compared to 31% of all).
- Most likely to state they always pay early to get the prompt payment discount (99% vs. 92% of all).
- Most concerned with the clarity of their power bill (62% vs. 45% of all).
- Less likely to say they don’t even open their bill (8% vs. 15% of all).
- Less likely to agree they are getting value for money from their power company (41% vs. 48% of all).
- Most likely to agree with the statement, ‘I don’t trust power companies who promise a better deal as they all end up charging the same’ (60% vs. 49% of all).

7.3.2 Uninformed strugglers (15%)

Demographics - More likely to:

- Have only one person aged 18 years or older living in the house (38% compared to 21% of the general sample
- Less likely to work full-time (36% vs. 55% of all) and more likely to be unemployed (16% vs. 6% of all).
- More likely to be on a low household income (less than $40K, 50% vs. 20% of all).
- More likely to be renting (57% vs. 26% of all).
- Less likely to have a tertiary qualification (47% vs. 64% of all).

Best Information channels

- A flyer (30%)
- Email (18%)
- A separate standalone website (15%)

A Distinguishing characteristic: Say they put in the most effort to manage their power use (62% total effort compared to 46% of general sample)

Summary: energy behaviour and Information interest

It is likely that the greater effort they put in to managing their power use is directly related to their lack of financial resources. These strugglers tend to be a bit more wary and suspicious of the wider world. They are least likely to read newspapers and most likely to agree that 'I don't like signing contracts as I'm worried about the fine print' and are also the segment most likely to have an unfavourable view of big companies. The Strugglers are more likely to want information about power use but less likely to think more detailed information around price would be useful to them. This suggests they are interested in undertaking easy to understand actions to save power but less interested in trying to understand more of the detail around pricing to reduce their monthly bill. We suspect that is most likely because they fear they will not understand all the written detail. They are also the group who were least satisfied with the services provided by their power company and least likely to be able to understand their current bills.

Detailed segment description

Similar to all for electricity use (Winter bill 41% spend more than $100 but less than $200 and 38% spend more than $200 but less than $300 a month).

Attitudes towards energy efficiency and declared behaviours

- Most likely of all segments to make an effort to save power (62% make an effort vs. 46% of all).
- However, least likely to know how to manage their power use (63% know 'a lot' or 'fair amount' compared to 78% of all).

In terms of behaviour they are:

- More likely to use as little power as possible by doing things such as turning off lights and taking short showers (37% already doing vs. 28% of all).
- Less likely to have already installed energy efficient measures such as insulation (28% vs. 37% of all).

They are also more willing to switch providers to get the best deal possible (34% were 'very willing' vs. 24% of all).

Interest in information

This segment was more likely to state they wanted more information about power usage (59% vs. 47% of all). However, they were very similar to overall figures when rating their level of interest in information being included in their power bill; their ratings were also similar regarding their interest in information about different power companies.

They were different to the overall figures when it came to rating the usefulness of information on electricity prices. The 'uninformed strugglers' were more likely to rate information on electricity prices as less useful.

The top three ranking pieces of information about electricity prices rated as less useful by the 'uninformed strugglers' were:

- A standard benchmark rate per unit of power, so you can compare prices with other power companies (64% vs. 75% of all).
- An independent website that compares the prices of different power companies (61% vs. 73% of all).
- The different rate or plans offered by all the power companies on an independent website (58% vs. 68% of all).

When compared to other segments, they were the least likely to find information on the different components that make up electricity charges on your power bill useful (48% vs. 60% of all).

Power company relationship

- Most likely to have changed power companies in the past two years (61% compared to 31% of all).
- More likely to agree you can save money by switching power companies (62% vs. 51% of all).
- Most likely to agree 'Power companies are pretty much the same – price is the only factor that can be different' (65% vs. 52%)
- Least likely to think it is easy to compare what power companies charge (27% vs. 45% of all).
- Least likely to believe bills are easy to understand (52% vs. 78% of all) and bills have all the information I need (50% vs. 76% of all).

7.3.3 Wealthy cynics (18%)

Demographics - More likely to:

– Be 30-44 (50% compared to 41% of the general sample).
– More likely to have larger households (34% have three or more people over 18, vs. 19% of all and 30% have no people under 18 vs 57% of all).
– Have high household income (more than $100K, 45% vs. 29% of all).
– Own home with a mortgage (54% vs. 39% of all).
– Work full-time (64% vs. 55% of all).

Best Information channels

– On a separate standalone website (31%).
– A retailer's website (23%).
– Email (22%).

A Distinguishing characteristic: Across several measures that gauged how trustworthy respondents were of service providers (including power companies) and the deals they offered the Cynics are least likely to trust them on all accounts.

Summary: energy behaviour and Information interest

The Cynics are also less satisfied with the services provided to them by their power company. When it comes to power-related information they are more likely than average to want information about power use and also more likely to feel that information about power prices would be useful to them. This is most likely a reflection of them wanting to get the best deal possible out of their power companies (who they currently don't trust to provide them with good deals).

Detailed segment description

High electricity users (In winter, 87% use more than $300 per month compared to 20% of all).

Attitudes towards energy efficiency and declared behaviours

- Put in less effort to save power (33% vs. 46% of all).

In terms of behaviour they are significantly less willing to:

- Use as little power as possible by doing things such as turning off lights and taking short showers (17% already doing vs. 28% of all and 16% not willing vs. 9% of all).
- Carefully monitor power usage (6% already doing vs. 11% of all)

However, they are more willing to switch power providers to get the best deal possible (54% are willing compared to 39% of all).

Interest in information

More likely to want more information about power usage (60% vs. 47% of all).

They were generally more likely to be interested in information about different power companies and information being included in their power bill.

For information comparing different power companies:

- They were more likely to be interested in an effective rate paid which would provide a common benchmark rate to compare pricing across power companies (77% vs. 67% of all).
- They were less likely to be interested in ownership structure (32% vs. 39% of all).

For information being included in their power bill, they were more interested in:

- Retail charges - that is, the mark up the retail company charges (72% vs. 65% of all).
- A link to the Powerswitch website which helps you compare competing deals (77% vs. 64% of all).
- Metering charges - that is, the cost of the metering equipment (62% vs. 54% of all).

They were also more likely to report information on electricity prices as useful:

- Standard benchmark rate per unit of power, so you can compare prices with other power companies (84% vs. 75% of all).
- An independent website that compares the prices of different power companies (80% vs. 73% of all).
- The different rate or plans offered by all the power companies on an independent website (78% vs. 68% of all).
- Price trends for power companies over three years on an independent website (63% vs. 56% of all).

Power company relationship

Across all segments, Wealthy cynics are least likely to:

- Agree they are loyal to their power company (40% vs. 53% of all).
- Be satisfied with the level of general overall service (47% vs. 66% of all).
- Be satisfied with the provision of extra services (29% vs. 49% of all).
- Be satisfied with their value for money (29% vs. 48% of all).

7.3.4 Self-informed actives (18%)

Demographics - More likely to:

- Be under 45 years of age (15% are 18-29 compared to 10% of the general sample and 50% are 30-44 vs. 41% of all)
- Have a household income between $70K and $100K (22% vs. 16% of all)
- Own home with a mortgage (51% vs. 39% of all).
- Work full-time (65% vs. 55% of all)
- Read the newspaper or view it online nearly every day (76% vs. 69%)
- Have a tertiary qualification (72% vs. 64% of all)

Best Information channels

- On a separate standalone website (36%)
- On a retailer's website (27%)
- Email (26%)

A Distinguishing characteristic: Most likely to declare being knowledgeable about how to manage power (90% compared to 78% of general sample)

Summary: energy behaviour and Information interest

The Self-informed are less interested in further energy-related information mainly because they are already finding what they need. They are confident that they can save money by switching power companies and are most likely to have switched. The Self-informed are most likely to study the bill when it arrives and most likely to use online tools to pay and review their bill. This all means they already are easily able to find the information they need to make informed power-use decisions. They are also most likely to report it is easy to compare what power companies charge. The Self-informed are more satisfied with their power companies than all other segments and they are most likely to be satisfied that their bills are easy to understand and contain all the information they need.

Detailed segment description

Low electricity users (In winter, 11% use less than $100 per month vs. 6% of all and 46% spend $100-$200 per month vs. 36% of all).

Attitudes towards energy efficiency and declared behaviours

- More likely to make an effort to save power (55% vs. 46% of all).
- Most likely to say they know how to manage their power use (90% know 'a lot' or a 'fair amount' vs. 78% of all).
- More likely to be interested in monitoring power usage (73% vs. 62% of all).
- Least likely to only look at the dollar amount they need to pay (13% vs. 48% of all).

In terms of behaviour they are significantly more likely to:

- Switch power providers to get the best deal possible (23% already doing vs. 11% of all).
- Regularly review the electricity plan or rate I'm on (16% already doing vs. 10% of all and 51% willing vs. 41% of all).

- Continually seek and review relevant information to help me manage my power use (12% already doing vs. 7% of all).

For the following two behaviours, there were no real differences between this segment and the overall figures for those already engaging in these behaviours; however, a greater proportion of those in this segment were willing to engage in these behaviours.

- Ensure I'm using the best type of energy for my needs such as gas, electricity or other types on (55% of the 'self-informed' were willing to engage in this behaviour compared to 47% of all).
- Carefully monitor my power use (55% of the 'self-informed' were willing to engage in this behaviour compared to 45% of all).

Interest in information

They were less likely to report wanting more information about power usage (33% vs. 47% of all); the predominant reason for this is that they already have enough information (80%). They may also have less need of additional information as they are the segment most likely to report it is easy to compare what power companies charge (75% vs. 45% of all).

When asked whether they were interested in more specific information the Self-informed were generally no more or less likely to express interest than the overall figures.

When asked about their interest in information on different power companies, they expressed a slightly higher level of interest in only one of the five pieces of information tested. For 'views of customer service', 56% of this segment expressed interest compared to 50% of all.

When asked about their interest in information being included in their power bill, they expressed a higher level of interest in only one of the ten pieces of information tested. For 'the different rates your company offers', 81% of this segment expressed interest compared to 74% of all.

They were much more likely to rate the usefulness of information on electricity prices highly, with nine of the eleven pieces of information being tested rated significantly higher by this segment than the overall figures. The top three rated pieces of information were:

- An independent website that compares the prices of different power companies (89% vs. 73% of all).
- A standard benchmark rate per unit of power, so you can compare prices with other power companies (84% vs. 75% of all).
- The different rate or plans offered by all the power companies on an independent website (84% vs. 68% of all).

Power company relationship

- Significantly more likely to have changed power companies in the past two years (51% compared to 31% of all).

- Most likely to be satisfied with the overall service of their power company (86% vs. 66% of all), the provision of extra services (77% vs. 49% of all) and the value for their money (71% satisfied vs. 48% of all).
- Most likely to be satisfied that their bills are easy to understand (94% vs. 78% of all) and that their bills have all the information they need (94% vs. 76% of all).
- More likely to believe power companies are trustworthy in terms of offering the best deals (46% vs. 38% of all).
- They were also more likely to be happy with the price of their current company and believe their current company would match any deal from a competitor (58%).

7.3.5 Active loyalists (14%)

Demographics - More likely to:

- Be female (59% compared to 52% of the general sample)
- Be 60 years plus (74% vs. 22% of all)
- To have lived in current residence for more than ten years (61% vs. 35% of all)
- To have only one person aged 18 years or older living in the house (42% vs. 21% of all)
- Be on low household income (less than $40K, 47% vs. 20% of all)
- Own home freehold (71% vs. 31% of all)
- Be retired (59% vs. 14% of all)

Best Information channels

- Information with your electricity bill (24%)
- A flyer (20%)
- Email (17%)

A Distinguishing characteristic: Most likely to declare loyalty to their power company (79% loyal compared to 53% of general sample)

Summary: energy behaviour and Information interest

The Loyalists also have a low desire for additional information. They are less likely to want more information on power use, less likely to want to monitor their power consumption and less likely to think that information related to energy-price transparency would be useful to them. However, they are also more likely to already be working at using as little power as possible. And they are more satisfied than average with their power provider.

Detailed segment description

Cheaper electricity users - higher percentage have winter bill less than $100 per month (11% vs. 6% of all) and most spend $100-$200 per month (56% vs. 36% of all).

- More likely to make an effort to save power (55% make an effort vs. 46% of all).
- Lower interest in monitoring power usage (41% vs. 62% of all).

In terms of power management they are significantly more likely to already be engaging in some behaviours:

- Use as little power as possible by doing things such as turning off lights and taking short showers (45% already doing vs. 28% of all).
- Install energy efficient measures such as insulation (57% already doing vs. 37% of all).
- Carefully monitor power usage (22% already doing vs. 11% of all).
- Regularly review the electricity plan or rate I'm on (16% already doing vs. 10% of all).
- Ensure they're using the best type of energy for their needs (22% already doing vs. 11% of all).

However, higher proportions were also not willing to engage in power management behaviour. Most notably, 57% said they were not willing to switch providers to get the best deal (compared to 30% of all). Although this segment has higher proportions of those already carefully monitoring usage and regularly reviewing their plan, it also had larger proportions not willing to do these things (23% and 37% were not willing, respectively, compared to 16% and 22% of all).

Interest in information

Less likely to want more information about power usage (28% vs. 47% of all).

Reasons are:

- They already have enough (67%).
- They are not interested (17%).
- Their bill is not excessive (11%).

They had the lowest interest in information about different power companies and information being included in their power bill.

For information comparing different power companies, they were least interested – across all the segments - in:

- An effective rate paid which would provide a common benchmark rate to compare pricing across power companies (40% vs. 67% of all).
- Views of customer service (36% vs. 50% of all).
- Sources of generation (33% vs. 51% of all).
- Ownership structure (28% vs. 39% of all).

For information being included in their power bill, they were least likely of all segments to rate nine of the ten pieces of information tested as interesting, the top three ranking[3] pieces they rated least interesting were:

- The different rates your company offers (57% vs. 74% of all).
- A graphic showing how your usage compares with other similar households (45% vs. 66% of all).

[3] When looking at the highest ratings given by the overall sample

- Retail charges; that is, the mark up the retail company charges (37% vs. 65% of all).

They were also least likely to report information on electricity prices as useful. They were least likely to rate seven of the eleven pieces of information tested as useful, the top three ranking pieces they rated less useful were:

- A standard benchmark rate per unit of power, so you can compare prices with other power companies (55% vs. 75% of all).
- An independent website that compares the prices of different power companies (44% vs. 73% of all).
- The different rate or plans offered by all the power companies on an independent website (36% vs. 68% of all).

Power company relationship

- Least likely of all segments to have changed power companies in the past two years (15% compared to 31% of all).
- Least likely to agree you can save money by switching power companies (26% vs. 51% of all).
- Most likely to report they are loyal to their power company (79% vs. 53% of all).
- Their main reason for remaining with their power company was that they were happy with their price or thought their current company would match competitor's deals (44%); this was closely followed by happiness with service (42%).

7.3.6 Apathetic conservatives (14%)

Demographics - More likely to:

- Be 45-59 (41% versus 27% when compared to all respondents).
- Have high household income (more than $100K, 42% vs. 29% of all).
- Own home freehold (41% vs. 31% of all) or with a mortgage (49% vs. 39% of all).
- Work full-time (63% vs. 55%).
- Read the newspaper or view it online nearly every day (85% vs. 69% of all).

Best Information channels

- On a separate standalone website (30%).
- Email (27%).
- Information with your electricity bill (21%).

A Distinguishing characteristic: Least likely to agree, 'Environmental responsibility is very important and I'll take action even if it means more work for me' (28% agree compared to 53% of general sample)

Summary: energy behaviour and Information interest

The Conservatives are putting in the least effort to manage their power use and they are least interested in further energy-related information. Across the survey questions that measured how useful respondents felt a range of price-related energy information would be to them the

Conservatives are least likely to view this information as useful. They have high incomes and have little sympathy for the environment so have little motivation to conserve and save power this is reflected in their lack of interest in their energy bill. The Conservatives are most likely to only look at the dollar amount to pay on their power bills and explore no further. This segment is also least likely to be interested in monitoring their power use.

Detailed segment description

Middle-range electricity users (45% use $200-$300 per month in winter compared to 33% of all).

Attitudes towards energy efficiency and declared behaviours

- Least likely to make an effort to save power (26% make an effort vs. 46% of all).
- Least likely to be interested in monitoring power usage (30% vs. 62% of all).
- Most likely to only look at the dollar amount they need to pay (72% vs. 48% of all).

In terms of power management behaviour they are significantly less willing to:

- Use as little power as possible by doing things such as turning off lights and taking short showers (19% already doing vs. 28% of all and 17% not willing vs. 9% of all).
- Switch power providers to get the best deal possible (5% already doing vs. 11% of all and 52% not willing vs. 30% of all).
- Carefully monitor power usage (5% already doing vs. 11% of all and 40% not willing vs. 16% of all).
- Regularly review the electricity plan or rate I'm on (4% already doing vs. 10% of all and 45% not willing vs. 22% of all).
- Continually seek and review relevant information to help me manage my power use (1% already doing vs. 7% of all and 48% not willing vs. 23% of all).

Interest in information

Comfortable conservatives are the segment least likely to want more information about power usage (21% vs. 47% of all).

Reasons are:

- They already have enough (56%).
- Are not interested (26%).
- Their bill is not excessive (14%).

They were also less likely to be interested in information about different power companies and information being included in their power bill.

For information comparing different power companies, when compared to the other segments, they were least interested in:

- Sponsorship and community contribution (33% vs. 45% of all).
- Views of customer service (36% vs. 50% of all).

For information being included in their power bill, when compared to the other segments, they were least interested in:

- The Electricity Authority levy (41% vs. 52% of all).

They were also less likely to report information on electricity prices as useful. In comparison to other segments, they were least likely to find the following useful:

- Information via a diagram explaining your power bill on a consumer website (30% vs. 49% of all).
- A guide to understanding power bills on your company's website (31% vs. 51% of all).
- Your own electricity bill (52% vs. 65% of all).

Power company relationship

- Significantly less likely to have changed power companies in the past two years (17% compared to 31% of all).
- They were also less likely to believe not being able to understand information and work out the best deal was an issue in them not switching (14% vs. 28% of all).
- Less likely to agree you can save money by switching power companies (39% vs. 51% of all).
- Their main reason for remaining with their power company was that they were happy with their price or thought their current company would match competitor's deals (43%).

Overview of small business depths

Five interviews with small business owners were conducted in this study to gain a 'toe in the water' sense of small business owners' views. The summary findings expressed here need to be interpreted carefully as they are based on a very small sample and can only be treated as indicated at best.

- Overall the views expressed by the five business owner were not that much different to the general population. If anything they were even more focused on the bottom line in terms of just the overall power charge and more likely to suggest they had less time to become more familiar with the greater detail on their bill. In the general public research it appeared that parents tended to take the lead in coercing sometimes resistant children into energy efficient behaviours. In a similar, way small business owners had the same issues coercing employees to also be more energy efficient. The commonality being those being browbeat were not responsible for paying the bill.

Energy efficiency behaviour

- Most did all that they could practically do to ensure they did not waste power, more so than the general public they were focused on the bottom line and interested in saving money where they could.

- Most made an effort to ensure lights were turned off when rooms were not in use. Also machinery, appliances and computers were also switched off when not needed for business activities.

- There was some interest in more energy efficient information but this needed to be presented in a way that showed return on investment.

- Some were in lease premises so they had limited ability to improve the heating and insulation aspects of their buildings even if they wanted to.

- The biggest challenge was to ensure employees were aware of basic energy efficient behaviours. As employees were not paying the power bills it was difficult to ensure they took measures to save power. There was no real incentive for staff to turn lights off and efficiently use heating appliances.

- A few business owners had recently changed providers and in these cases they had made significant savings. In one example a business owner who had used a broker was astounded at the savings that he was able to make by changing on to a different plan with the same provider. His distrust in power companies had increased because he managed to get a better deal from his current provider simply because a broker dealt with his company.

- Most felt that there was enough competition and enough companies chasing their business through door knocking to be able to eventually find a good deal (even if a broker had to be employed).

Understanding power bills

- Like the general public most were only interested in the price they had to pay on their bill they would check the price with the previous month and as long as it seemed within an expected range they would look no further.

- Some noted that if the bill went up dramatically it could be the result of faulty equipment or a need to meet with staff and discuss what could be causing the upswing in power use. In this context the power bill total was a useful monitoring tool for gauging how certain aspects of their business was tracking. In one cafe a higher bill was a sign of a good month for business.

- Business owners were split on whether they were happy with the information on their power bills. A few were happy and thought that they provided all the information they needed. They felt that their bill was simple and straightforward and easy to understand. However a few who were clearly not happy with power companies felt that they needed more clarity on their bill around specific charges so they could hold their provider more accountable on what they considered to be be excessive charges.

- However, prior to the interview most had paid little attention to their power bills mainly because they were too busy doing other things to be worried about that kind of detail.

Interest in additional information

- While the idea of more transparent information sounded like a good thing and it was easy for business owners to say that they would be interested in electricity charges being more transparent. The reality was that few would have the time to pay much attention to the additional detail and at the end of the day they would not find the time to use the more transparent charge information.

- Most only ever looked at the 'bottom line' when there bill arrived and filed the bill ready to pay it when it was due.

- A few of the business owners felt more transparent charge information could potentially give help them to make more informed comparisons between the various providers and hold their providers more accountable.

- Even though a few indicated that they wanted more transparent information so they could hold their power providers more accountable. It was clear that this would have to be made very easy for them to access as they didn't necessarily have the time to put effort into the comparison process.

Power company relationship

- Power companies were viewed by one business owner as a 'necessary evil' they noted that you had to have access to their services so you had to deal with them but they didn't really trust them.

- None of these interviewed expressed any loyalty to their power company they were open to approaches to other companies and felt that there was enough competition around and companies jostling for their business that good deals could be found.

- Often they were with their current provider for no other reason than inertia. Some noted that when running a small business they were often 'fire fighting' and there was no time to devote to an in-depth analysis of electricity costs to see if they could access a better deal elsewhere. However, if it could be easily done and savings guaranteed they would definitely be interested.

- The impetus to spend time on evaluating their power costs was much greater for business with larger energy expenditure. Some of the business owners interviewed had power bills that were similar to a typical domestic household, while the savings that one business owner had made by employing a broker was similar to the entire bill of another business owner who participated in this research.

- Few of the business owners wanted to be able to run both the business and home through the same power company. The saw this as an opportunity to stream line the number of bills they received and also a chance to maybe get a better deal as the were combining more business through one channel. They had both tried to have a combined bill and service and it both cases they had been turned down. This had put the power companies in bad light as they both noted that other amenity providers (telephone) had been able to provide this service.

Telephone survey

INTRODUCTION

We are conducting a nationwide opinion poll about an important issue for New Zealand. We are doing it on behalf of the Electricity Authority to understand the public's views about power and information you might want. I would like to speak to someone in your household who is either responsible for paying the electricity bill or has a say in who your power company - Is that you?

SEX INTERVIEWER: Record respondents gender

Male...1
Female.......................................2

F1 Firstly, we need to make sure that we speak to people of all different ages. What age group are you in?
Please stop me when I read out the appropriate age group.
[READ LIST]

18-19..1
20-24..2
25-29..3
30-34..4
35-39..5
40-44..6
45-49..7
50-54..8
55-59..9
60-64..0
65-69..1
70-74..2
75 Plus......................................3
[DO NOT READ] Refused........................4

IF F1='[DO NOT READ] Refused' ASK TERMINATE

Q1 What is the name of the company that you pay your monthly electricity bills to?
[READ LIST ONLY IF RESPONDENT IS UNSURE]

Contact Energy...............................1
Genesis Energy...............................2
Mega Energy..................................3
Mercury Energy...............................4
Meridian Energy..............................5
TrustPower...................................6
Energy Online................................7
Empower......................................8
Bay of Plenty Electricity....................9
Bosco Connect................................0
Energy Direct................................1
Just Energy..................................2
King Country Energy..........................3
Nova Energy..................................4
Opunake Hydro................................5
Powershop NZ.................................6
Prime Energy.................................7
Pulse Energy.................................8
Tiny Mighty Power............................9
[DO NOT READ]Unsure/Don't know...............0

Q1A As you know your power bill changes depending on how much you use and whether it is summer or winter. Taking this into account how much would you say your power bill each month in summer is: [READ LIST]

less than $100 a month..........................1
more than $100, but less than $200 a month.......2
more than $200, but less than $300 a month......3
more than $300, but less than $400 a month.......4
more than $400, but less than $500 a month.......5
or more than $500 a month.......................6
[DO NOT READ]Unsure/Don't know..................7

Q1B And in winter would you say your power bill each month is: [READ LIST]

less than $100 a month..........................1
more than $100, but less than $200 a month.......2
more than $200, but less than $300 a month......3
more than $300, but less than $400 a month.......4
more than $400, but less than $500 a month.......5
or more than $500 a month.......................6
[DO NOT READ]Unsure/Don't know..................7

Q2 Does your house also have a gas supply? [DO NOT READ]

Yes...1
No..2
Unsure..3

IF Q2='Yes' ASK

Q2A Is your gas supply piped into your home or do you have LPG bottled gas?

Bottled...1 GO TO SKIP2B
Piped into home.................................2

Q2B Do you have the same power company supplying electricity and gas To your home? [DO NOT READ]

Yes...1
No..2
Unsure..3

SKIP2B CONTINUE
ASK ALL

Q2C Do you have access to online tools to analyse your power usage? [DO NOT READ]

Yes...1
No..2
Unsure..3

IF Q2C='Yes' ASK

Q2C1 On a 1 to 5 scale where 1 means very useful and 5 means not useful at all how useful would say this online tool is?

1 - very useful..................................1
2..2
3..3
4..4
5 - not useful at all............................5
[DO NOT READ]Unsure..............................6

ASK ALL

Q2D Do you have a smart meter? (That is a meter that is read remotely without needing someone to visit and read the meter manually)
[DO NOT READ]

Yes..1
No...2
Unsure...3

Q3 Using a scale of 1 to 5 where 1 means you make a lot of effort and 5 means you make very little effort - how much effort do you make to manage the power use in your household?

1 - A lot of effort..............................1
2..2
3..3
4..4
5 - Very little effort...........................5
[DO NOT READ]Unsure..............................6

IF Q3='1 - A lot of effort' OR Q3='2' ASK

Q3A What do you do to manage your power use?
[PRE-CODES, DO NOT READ]

MP
Turn off lights..................................1
Shorter showers..................................2
Have a heat pump.................................3
Have a wet back on fire place....................4
Installed insulation.............................5
Put in double glazing............................6
Turn appliances off at the wall..................7
Use energy efficient light bulbs.................8
Use solar power..................................9
Have energy efficient appliances.................0
Limit use of drier...............................1
Switch provider to get best deal on power........2
[DO NOT READ]Unsure..............................3
[DO NOT READ]Refused.............................4
Other (specify) 5
(32-51)

Specified Other

IF Q3='4' OR Q3='5 - Very little effort' ASK

Q3B Why don't you make much effort to manage your power use?
[PRE-CODES, DO NOT READ]

	MP
Lack of time	1
Lack information or awareness of energy efficient tips	2
Can't afford to	3
Is not a priority for me	4
Renting so am limited in what I can do	5
Power bill is not very high	6
[DO NOT READ]Unsure	7
[DO NOT READ]Refused	8
Other (specify)	9
	(53-72)

Specified Other

ASK ALL

Q3C How much would you say you know about how to manage your power use - a lot, a fair amount, not that much or hardly anything?

A lot	1
A fair amount	2
Not that much	3
Hardly anything	4
Unsure	5

---

4 Using a scale of 1-5 where 1 means you would be very willing and 5 that you wouldn't be willing at all, how willing would you be to take the following steps to manage your power use. Remember, you can use any number between 1-5. If you are already doing the following or they are not applicable to your circumstances please just say so.
[RANDOMIZE]

-1- Use as little power as possible by doing things such as turning off
lights, taking short showers
-2- Switch power providers to get the best deal possible
-3- Install energy efficient measures such as insulation
-4- Carefully monitor my power use
-5- Regularly review the electricity plan or rate I'm on
-6- Ensure I'm using the best type of energy for my needs such as gas, electricity or other types
-7- Install renewable energy options like solar

	-1- (74)	-2- (75)	-3- (76)	-4- (77)	-5- (78)	-6- (79)	-7- (80) SP
1 - would be very willing	1	1	1	1	1	1	1
2	2	2	2	2	2	2	2
3	3	3	3	3	3	3	3
4	4	4	4	4	4	4	4
5 - wouldn't be willing at all	5	5	5	5	5	5	5
Already doing	6	6	6	6	6	6	6
Not applicable	7	7	7	7	7	7	7
[DO NOT READ]Unsure	8	8	8	8	8	8	8

Q5 Using a 1-5 scale where 1 means - very interested, and 5 – not at all interested, how interested are you in monitoring your power usage?

1 - Very interested.............................1
2...2
3...3
4...4
5 - Not at all interested.......................5
[DO NOT READ] Unsure............................6

Q6 Would you like more information about power or electricity use? [DO NOT READ]

Yes...1
No..2
Unsure..3

IF Q6='Yes' ASK

Q7 What information would you like?
[PRE-CODES, DO NOT READ]

MP
Power saving tips...............................1
Advice on insulation............................2
Advice on double glazing........................3
Power usage of specific appliances..............4
Advice on efficient heating options.............5
[DO NOT READ]Unsure.............................6
[DO NOT READ]Refused............................7
Other (specify) 8
(11-30)

Specified Other

IF Q6='No' ASK

Q8 Why don't you want more information?
[PRE-CODES, DO NOT READ]

MP
Not interested..................................1
Too hard to understand..........................2
Already have enough.............................3
My bill is not high excessive...................4
[DO NOT READ] Unsure............................5
[DO NOT READ]Refused............................6
Other (specify) 7
(32-51)

Specified Other

ASK ALL

Q9 If you were looking for information on how to manage power or electricity use where would you go to find it?
[PRECODES, DO NOT READ]

MP
Electricity Authority...........................1
EECA (Energy Efficient and Conservation Authority)......................................2
Consumers NZ....................................3
Powerswitch website.............................4

What's my number website........................5
The Government..................................6
Local Council...................................7
General reference to Internet/Website/Search
Engine/Google...................................8
Power company website...........................9
MP
Power bill......................................0
Talk to friends or family.......................1
The Power Board.................................2
Energywise......................................3
[DO NOT READ] Unsure............................4
Other (specify) 5
(54-73)

Specified Other

Q10 Using a 1 to 5 scale where 1 is very easy and 5 is not easy at all, how easy do you think it is to compare what power companies charge for the services they offer?

1 - very easy...................................1
2...2
3...3
4...4
5 - Not easy at all.............................5
[DO NOT READ]Unsure.............................6

IF Q10='4' OR Q10='5 - Not easy at all' ASK

Q10A Why is it difficult to compare what power companies charge for the services they offer?
[PRE-CODES, DO NOT READ]

MP
Different plans and rates.......................1
No standard rate across companies to compare.....2
Lack of transparent information.................3
Hard to find information........................4
Difficult to understand what you are being
charged...5
[DO NOT READ]Unsure.............................6
[DO NOT READ]Refused............................7
Other (specify) 8
(8-27)

Specified Other

Q10B What would help make it easier to compare what power companies charge for the services they offer?
[PRE-CODES, DO NOT READ]

Independent website comparing rates.............1
A standard comparable rate across power companies2
More transparent information....................3
[DO NOT READ]Unsure^s...........................4
[DO NOT READ]Refused^s..........................5
Other (specify) 6
(29-48)

Specified Other

ASK ALL

Q11 Using a 1-5 scale where 1 means - very satisfied - and 5 – not at all satisfied, how satisfied are you with your power company on the following?
[RANDOMIZE]

-1- Value for money
-2- General overall service
-3- The provision of extra services like online power usage information, energy efficiency services, other loyalty reward programmes
-4- Bills are easy to understand
-5- Bills have all the information I need

	-1- (49)	-2- (50)	-3- (51)	-4- (52)	-5- (53)SP
1 - very satisfied	1	1	1	1	1
2.................	2	2	2	2	2
3.................	3	3	3	3	3
4.................	4	4	4	4	4
5 - not at all satisfied.........	5	5	5	5	5
[DO NOT READ] Unsure............	6	6	6	6	6

IF Q11(4)='4' OR Q11(4)='5 - not at all satisfied' ASK

Q12A What is difficult to understand in your bill?
[PRE-CODES, DO NOT READ]

	MP
Don't understand what the different charges mean.	1
[DO NOT READ]Unsure.............................	2
[DO NOT READ]Refused............................	3
Other (specify)	4

(55-74)

Specified Other

IF Q11(5)='4' OR Q11(5)='5 - not at all satisfied' ASK

Q12B What information is missing in your bill? What would you like to see?

(8-27)

ASK ALL

Q13 Which of the following apply to you in regard to your power bill?
[RANDOMIZE]

-1- I often don't even open my bill
-2- I pay electronically (e.g. direct debit, automatic payment, credit card, internet banking etc.)
-3- I only get an online bill
-4- I regularly review my billing information online
-5- I always pay early so that I get the prompt payment discount
-6- I only look at the dollar amount I need to pay

	-1- (28)	-2- (29)	-3- (30)	-4- (31)	-5- (32)	-6- (33) SP
Apply............	1	1	1	1	1	1
Not apply.........	2	2	2	2	2	2
[DO NOT READ]Unsure.......	3	3	3	3	3	3
[DO NOT READ]Not applicable........	4	4	4	4	4	4

Q14 Using a 0-10 scale where 0 means - not at all useful, and 10 means - very useful, how useful would you personally find the following information on electricity prices?:
[11 = Unsure]
[RANDOMIZE]

-1- A quarterly report of domestic electricity prices on the Ministry of Business, innovation and Employment’s website
-2- A guide to understanding power bills on your company's website
-3- A diagram explaining your power bill on a consumer website
-4- Information on the different components that make up electricity charges on your power bill
-5- Price trends for power companies over three years on an independent website
-6- Tips for saving energy on your power company's website and links to other websites with similar information
-7- An independent website that compares the prices of different power companies
-8- Sample bills with an explanation of the different components on an independent website
-9- Your own electricity bill
-10- The different rate or plans offered by all the power companies on an independent website
-11- A standard benchmark rate per unit of power, so you can compare prices with other power companies

	-8- (48-49)	-9- (50-51)	-10- (52-53)	-11- (54-55)
0 TO 11..........	_______	_______	_______	_______

Q15 Using a 1 to 5 scale where 1 means very concerned and 5 means not concerned at all, how concerned are you about how clearly information on electricity charges are outlined in your power bill?

1 - very concerned..............................1
2..2
3..3
4..4
5 - not concerned at all........................5
[DO NOT READ] Unsure............................6

Q16 Using a 0-10 scale where 0 means - not at all interested, and 10 means - very interested. please rate how interested you would be in the following information being included in your power bill?
[11 = Unsure]
[RANDOMIZE]

-1- Transmission charges - that is..the cost to transport electricity from the generator to your local area
-2- Distribution charges - that is..the cost to transport electricity around your local area to your door
-3- Metering charges - that is..the cost of the metering equipment
-4- Wholesale charges - that is..the wholesale cost of electricity which the retailer pays
-5- Retail charges - that is..the mark up the retail company charges
-6- The Electricity Authority levy
-7- Overhead charges - that is..the cost to run the retail business such as salaries, office costs etc
-8- The different rates your company offers
-9- A graphic showing how your usage compares with other similar households
-10- A link to the Powerswitch website which helps you compare competing deals

	-8-	-9-	-10-
	(71-72)	(73-74)	(75-76)
0 TO 11..........	_______	_______	_______

Q.17 And using the same 0-10 scale where 0 means - not at all interested, and 10 means - very interested. please rate how interested you would be in the following information on the different power companies?
[11 = Unsure]
[RANDOMIZE]

-1- Views of customer service
-2- Ownership structure
-3- Sources of generation
-4- Sponsorship and community contribution
-5- An effective rate paid which would provide a common benchmark rate to compare pricing across power companies

	-1-	-2-	-3-	-4-	-5-
	(77-78)	(79-80)	5/8-9	(10-11)	(12-13)
0 TO 11........	_________	_________	_________	_________	_________

ASK if indicated interest in new information

Q17A What would you use this information for?
[PRE-CODES, DO NOT READ]

To help me select a new provider.................1
Other (specify) 2
(15-34)

Specified Other

ASK if indicated interest in new information

Q18 You said you would be interested in some additional information - how up to date would that information need to be - would it need to be refreshed?
[READ LIST]

Daily..1
Weekly...2
Monthly..3
Quarterly..4
Six monthly......................................5
Annually...6
Or longer..7
[DO NOT READ] Unsure.............................8

Q19 What would be the best way to provide people like you with additional information on electricity pricing?
[PRE-CODES, DO NOT READ]

MP
A flyer..1
0800 number......................................2
Door to door consultant..........................3
Phone consultant.................................4
Information with your electricity bill...........5
In newspapers....................................6
In magazines.....................................7
On retailers website.............................8
On a separate standalone website.................9
MP
On social media such as Facebook.................0
Through an APP...................................1
[DO NOT READ] Unsure.............................2
Other (specify) 3
(38-57)

Specified Other

ASK ALL

Q20 Using a 0-10 scale where 0 means not at all trustworthy and 10 means extremely trustworthy, how trustworthy are the following in terms of offering the best deals to you?
[11 = Unsure]
[RANDOMIZE]
-1- Power companies
-2- Banks
-3- Telecommunications companies

	-1- (58-59)	-2- (60-61)	-3- (62-63)
0 TO 11..........	_________	_________	_________

UMR RESEARCH

Q21 Have you changed your power company in the past two years?

Yes...1
No..2
Unsure..3

IF Q21='Yes' ASK

Q22A How many times have you switched power company in the past two years?

Once..1
Twice...2
3 or more times.................................3
Unsure..4

IF Q21='No' OR Q21='Unsure' ASK

Q22B What are your main reasons for not switching?
[MULTI}
[DO NOT READ]

MP

Happy with price of current power company/current power company will match any deals...1
Happy with service from current power company....2
Did not trust there would be real gains from switching.......................................3
Too busy to investigate the best deals available.4
Lack of information on best deals available......5
Switching seemed too much hassle.................6
Have not got round to looking into this..........7
Did not want to get locked into a contract.......8
Was already locked into a contract...............9
Concerned there might be a problem with continuity of supply if we switched.............0
Electricity is such a small cost to my household it's not worth it..............................1
Offer(s) were no cheaper........................2
Concern about losing the rebate from the community owned lines company...................3
No other power company would take on my household4
Concern about connection or disconnection fees...5
Fear of loss of power during the changeover period..6
Current power company made a counter offer when I mentioned I was going to switch...............7
Don't Know/Unsure...............................8
Other (specify) 9
(8-27)

Specified Other

Q22C Using a 1 to 5 scale where 1 means - a lot and 5 means - not at all, how much were the following a factor in stopping you switching?
[RANDOMIZE]

-1- Not having the information to be able to compare deals
-2- Not being able to understand information and work out the best deal

	-1- (28)	-2- (29)	SP
1 - a lot.........	1	1	
2.................	2	2	

3................	3	3
4................	4	4
5 - not at all....	5	5
[DO NOT READ]		
Unsure...........	6	6

ASK ALL

Q.23 Now here are some things people sometimes say about themselves. Using a 0-10 scale, where 0 means .strongly disagree. and 10 means strongly agree. how much do you disagree or agree with the following statements:
[11 = Unsure]
[RANDOMIZE]

-1- I constantly look out for new opportunities to do things differently
-2- I generally trust people and will give them a fair hearing
-3- I am confident on the Internet and use it to purchase goods and services
-4- I find it's always best to be cautious and get a second opinion on most things before making up my mind
-5- I like looking out for bargains and always go for the best deal
-6- I don't make spontaneous decisions and like to take time to weigh things up
-7- I don't trust power companies who promise a better deal as they all end up charging the same
-8- Power bills are confusing and hard to understand so it is hard to know if you are getting a better deal
-9- I am loyal to my power company
-10- Power companies are pretty much the same - price is the only factor that can be different
-11- I don't like signing contracts as I'm worried about the fine print
-12- It's easy to switch power companies
-13- You can save money by switching power companies
-14- I'm the person in the household that tries hardest to save power
-15- Environmental responsibility is very important and I'll take action even if it means more work for me

	-15-
	(60-61)
0 TO 11..........	_______

Q24 Now here are some things people sometimes say about their lifestyle. Using a scale of 0-10 where 0 means you strongly disagree and 10 means you strongly agree, how much do you agree or disagree with the following statements:
[11 = Unsure]
[RANDOMIZE]

-1- I am conscious of finding a balance between my work and home life
-2- I am under financial pressure
-3- I like to make new friends and expand my social network
-4- I like to think about and debate key issues of the day
-5- I am a sporty, outdoors person
-6- Lack of time is a much bigger problem for me than lack of money
-7- Big companies only care about making profits

	-1-	-2-	-3-	-4-	-5-	-6-	-7-
	(62-63)	(64-65)	(66-67)	(68-69)	(70-71)	(72-73)	(74-75)
0 TO 11..........	_______	_______	_______	_______	_______	_______	_______

Q25 Please tell me if the following phrases apply to you?
[RANDOMIZE]

-1- I read the newspaper or view it online nearly every day
-2- I don't think there's any point in changing things unless there's something wrong
-3- I like to keep up with the latest technology
-4- I go overseas at least once every couple of years
-5- I'm involved in a lot of voluntary community activity
-6- I have a tertiary qualification

	-1-	-2-	-3-	-4-	-5-	-6-
	(76)	(77)	(78)	(79)	(80)	7/8
SP						
Yes...............	1	1	1	1	1	1
No................	2	2	2	2	2	2
Unsure...........	3	3	3	3	3	3

These last questions are for statistical purposes only, to make sure we have an
accurate sample.
Once again I would like to remind you that any information you give me is confidential

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D1 In your household, who is responsible for either paying the electricity bill or has a say in who your power company is?
[READ LIST]

Yourself...1
Yourself and your spouse or partner..............2
Yourself and others in the household.............3
[DO NOT READ]Unsure..............................4
Other (specify) 5
(10-29)
Specified Other

D2 How long have you lived at your current residence?
less than two years..............................1
2-5 years..2
6-10 years.......................................3
More than 10 years...............................4
[DO NOT READ]Unsure/Don't know...................5

D3 How many people 18 years of age or older are currently living in your household, including yourself?
[DO NOT READ]

1..1
2..2
3..3
4..4
5 or more..5
Unsure...6
Refused..7

D4 And how many people under the age of 18 years of age are currently living in your household?
[DO NOT READ]

0..1
1..2
2..3
3..4
4..5
5 or more................................6
Unsure...................................7
Refused..................................8

F3 What is the approximate combined before tax income in your household. Please stop me when I read out the appropriate income range.
[READ LIST]

$20,000 or less..........................1
$20,001-30,000...........................2
$30,001-40,000...........................3
$40,001-50,000...........................4
$50,001-70,000...........................5
$70,001-100,000..........................6
More than $100,000.......................7
Income was nil/or made a loss............8
[DO NOT READ] Refused....................9

F6 Which of the following ethnic groups do you belong to? One or several groups may apply to you.
[MULTI]
[CODE ALL THAT APPLY]
[READ LIST]

MP
NZ Maori.................................1
NZ European..............................2
British..................................3
Other European...........................4
Pacific Island...........................5
Chinese..................................6
Indian...................................7
Other Asian..............................8
Other (specify) 9
(35-54)

Specified Other

RUR2 Do you live in a rural area or district that has a population of less than 2,000 people?
[DO NOT READ]

Yes......................................1
No.......................................2
Unsure...................................3

D9 Which of the following describes the home you live in?
[READ LIST]

I am renting and looking to buy..................1
I am renting and not looking to buy..............2
I own my home freehold...........................3
I own my home with a mortgage....................4
I live at home with parents......................5
[DO NOT READ] Other..............................6
[DO NOT READ] Unsure.............................7
[DO NOT READ] Refused............................8

D10 What is your current work status? Are you working full-time, part-time or are you retired?
[IF SELF-EMPLOYED ASK WHETHER FULL TIME OR PART TIME]
[DO NOT READ]

Full time paid work..............................1
Part-time paid work..............................2
Retired..3
Unpaid work......................................4
Unemployed.......................................5
Student..6
Refused..7

IF D10='Full time paid work' OR D10='Part-time paid work' ASK

D11 Do you own or part own the business you work for?
[DO NOT READ]

Yes..1
No...2
Unsure...3

Thank and end survey