Electricity Authority

Electricity Consumers’ Survey

September 2018

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Objectives and method

1.1 Background

The Electricity Authority (the Authority) is an independent Crown entity responsible for the efficient operation of the New Zealand electricity market. The Authority is the electricity market regulator - regulating the electricity market by developing and setting the market rules, enforcing and administering them and monitoring the market's performance.

The Authority promotes competition in, reliable supply by, and the efficient operation of, the New Zealand electricity industry for the long-term benefit of consumers.

The Authority research shows that consumers are more likely to participate in the retail electricity market and/ or make decisions about their electricity usage if they can easily access information that will effectively inform those decisions.

In 2015, the Authority commissioned market research to explore the decision-making process and the role information may play in driving decisions. Further research was commissioned in 2016 and 2018 to track movements in key metrics over time.

1.2 Objectives

The key objective of the research was to provide ongoing measures of 'how consumers make choices (or decisions) regarding electricity offers', including both deals and retailer choices.

Other specific objectives are to:

- Measure why consumers do (or do not) make decisions about their electricity provider – this includes decisions around shopping around, reviewing, and switching.
- Measure how consumers make these decisions and to identify the key sources of information they use to make these decisions.
- Measure why they make the decisions or choices observed including the decision not to shop around or switch or be engaged with the electricity market in any way.
- Measure perceptions of whether particular processes or tools would make decisions and choices easier.
- Track key metrics over time.

The research is also used to identify behavioural segments across the decision cycle.

1.3 Method

The report is based on results from an online survey among a nationally representative sample of New Zealanders aged 18 years and over. The sample size was n=1,200 and fieldwork was carried out from the 7th to 14th August 2018. The margin of error for a 50% figure at the 95% confidence level for a sample size of 1,200 is plus or minus 2.8%.

Due to rounding, some charts may not add to 100%.

Key demographic data of the sample for the survey is appended to the end of this report.

Segmentation analysis was conducted to explore different groups of New Zealanders according to where they are placed on the decision-making cycle. This was carried out using factor and cluster analysis.

Segmentation: Cluster analysis

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 their satisfaction of five different kinds of household supplier as well as their level of care of what ones they change. They were also asked about some different behaviours such as news viewing habits, social media use, overseas visits and community involvement.

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 five-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. It was determined based on the k-means clustering algorithm.

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

Significance testing

The T-statistic was used to test for differences between specified groups with any significant differences noted in the report. The *t*-test is a two-tailed test. For each test, a P-value is computed which is the probability that the difference is significant. Any P-value less than or equal to 0.05 indicates a difference that is significant at the 95% confidence level.

Executive summary

Overall

Key metrics generally remained stable in the latest survey with most changes within a few percentage points and not significantly different.

A few key movements were evident with active reviewing showing an upward trend, increasing by 5 points to 35% that actively investigated deals from other retailers, while the same proportion (35%) reviewed their deal with their current retailer but did not switch (down 1%).

Switching levels remained much the same as 2016 with 13% switching plans with their current retailer (up 1%) and 18% switching to another retailer (up 1%). However, among switchers sources of information used in decision making moved much more towards digital channels and away from phone contact. This trend was in conjunction with retailer activity declining, with close to three in five respondents (56%) indicating they were approached about switching in the last two years, down 13% from 2014.

Across switchers, factors that appeared to increase in importance compared to 2016 were brand and reputation of the company, estimated total electricity bill, whether the price per kilowatt hour can change during the contract, and terms and conditions of the contract.

View of household suppliers

Satisfaction remained high across all five household suppliers with banks and mobile phone providers slightly ahead, on 84% and 81% respectively. Electricity retailers had the same level of satisfaction as internet providers (both 73%). Insurance providers had the lowest level of satisfaction at 65%. A majority (82%) of the sample had input or made the decision on the selection of their electricity retailer, which remained the lowest proportion of the five providers. Electricity retailers ranked second for both likelihood (23% likely) of switching and ease (65% easy) of switching, however it had the lowest level of care about which retailer is used (73%). The proportion of people who thought it worthwhile to actively shop around for new electricity providers (66%) also ranked second just behind internet providers. The proportion who thought it was worthwhile to review electricity providers also ranked second (41%), just behind internet providers.

Electricity retailer:

73% satisfied (↑ from 69%)

82% make the decisions (↑ from 81%)

23% likely to switch (↑ from 21%)

65% think it easy to switch (↑ from 60%)

73% care (↓ from 74%)

41% think worthwhile to review (↑ from 38%)

66% think worthwhile to actively shop around (no change)

View of electricity retailer

Respondents rated their electricity retailer on five different attributes, around two-thirds of respondents rated 'being well established', 'the payments solutions they offer' and 'overall quality of customer service' positively (72%, 69% and 67% respectively). Three-fifths of respondents rated 'overall value of money for the products and services' and 'the electricity plans they offer' positively (61% and 59% respectively).

69% confident they will choose the deal that is right for their household (↑ from 67%)

60% confident they have all the information they need to compare different offers (↑ from 57%)

Two out of three people indicated they were confident they could choose the right deal for their household while three-fifths (60%) said they were confident they had all the information they need to compare offers.

Reviewing and shopping around

Over a third of respondents claimed to have reviewed their current offer with their retailer but did not end up switching; and the same proportion actively investigated different offers or plans from other electricity retailers but did not make the switch over the last 12 months. In total, a third of respondents (33%) claimed to review or actively investigate different offers or plans but did not end up switching at all during the last 12 months.

35% reviewed their current offer with their current electricity retailer to see if they were on an okay deal but didn't switch as a result (↓ from 36%)

35% actively investigated different offers or plans from other electricity retailers but didn't switch as a result (↑ from 30%)

The most common sources of information for reviewing or shopping around among those that did not end up switching was a price comparison website (51%) and looking at the best price and savings (40%).

The main reasons they did not switch after reviewing or shopping around was that they regularly check which provider is the cheapest or just review out of general curiosity (46%) and that their current retailer had a better price or deal (13%).

Switching

In total, 58% made some choice to review or switch their plan or provider (up from 55% in 2016). Over the last year around one in ten (13%) indicated they had switched the plan they were on with their existing retailer and 18% had switched electricity retailers in the last 12 months. A quarter (26%) of the overall sample indicated they either switched the plan they were on with their existing retailer or switched electricity retailer in the last 12 months.

13% switched the plan they were on with their existing retailer (↑ from 12%)

18% switched electricity retailer (↑ from 17%)

The main reasons for switching were for a better price (51%) followed by 14% that said switching had resulted from moving to a new house. The main information used for switching were looking at best prices (41%) and price comparison websites (39%).

Barriers to taking action

Across respondents that had not reviewed or switched their electricity retailer, the main reasons for this behaviour were they were happy with their current plan or retailer, followed by that it was too much hassle, or being too busy to review or switch.

Price related factors were considered the most important for respondents overall when considering switching. This was followed by factors around the contract and lastly concerns around the reputation and attributes of any company they might switch to, for example sustainability and innovation.

83% said the price per kilowatt hour is important (no change)

76% said the plans available to you in your area is important (↑ from 74%)

68% said the brand and reputation of the company is important (↑ from 61%)

Nearly a third (30%) of respondents said they would need to save $250 or more a year to consider switching, while 28% said they would switch for $150-250, 23% would switch for $150 or less, and 19% were unsure.

Non-active consumers

When looking at the profile of consumers that had not undertaken any action, including switching, reviewing or investigating offers – demographics of this group were relatively similar to the general public respondents overall. This indicates a limited opportunity to target specific demographic groups to achieve major shifts in behaviour. It points to the need for a broad behavioural campaign which has wide appeal.

Information usage and needs

If comparing retailers, a majority (72%) would look at the electricity rate (price per kilowatt hour), and 64% would look at the size of the monthly bill. Fewer people would look at contract factors such as type of rate (fixed or variable rate) (55%) and length of contract (55%).

Price comparison websites and the electricity retailer were the preferred places for getting information on different electricity offers. The preferred channels to provide information were websites (62%) and via email (44%). Most (88%) could not think of any information that was missing or they had expected to find but had found was unavailable.

Preferred place of information:

61% Price comparison website (no change)

55% Electricity retailer (↓ from 63%)

14% General advertising (no change)

Around half of the sample said that it was easy to compare offers when deciding whether to switch electricity retailers and 15% said it was difficult; a similar rating to banks. Generally, people felt it was easier to compare mobile and internet providers (61% and 57% respectively) than electricity retailers while insurance providers were harder (39% easy). The two main reasons people gave for the ease of comparing electricity retailers were access to comparison websites and online information (36% and 20% respectively). The main reasons people had problems comparing electricity retailers was the complicated nature of electricity pricing, plans and discounts, and the lack of information on deals (16% and 11% respectively).

Options for utilising retail data

Interest remained high for a more detailed comparison website. Over two-thirds of respondents expressed an interest in a detailed comparison website for electricity retailers while only 8% were not interested. The main reasons they were interested were that it would make it easier and be more convenient to compare prices, and would save time (47%). While the key reason for a lack of interest was that they were happy with their current provider or they did not want to change (40%).

Comparison website:

67% Interested (no change)

8% Uninterested (↓ from 9%)

Third party or broker:

24% Interested (↑ from 21%)

44% Uninterested (↓ from 45%)

Close to a quarter (24%) of the sample expressed an interest in a third party or broker who would do comparison analysis on their behalf while 44% said they were not interested. The main reasons for interest in this service were that it would make it easier to compare deals (36%), followed by the belief the broker was an expert and could provide better information (25%), saving money (13%) and being able to get unbiased information from the provider (10%). Around two in five (42%) of those who were not interested in this service said they felt they could just do it themselves and therefore did not need a third party.

Segments

Segmentation analysis was repeated this year. Five segments were identified based on analysis of respondents' satisfaction and level of care when choosing their household suppliers as well as a range of behaviour traits. The segments followed similar trends to previous years and the size of each segment also remained broadly the same.

The Cynical Shoppers segment (16% of population, up three points) exhibited the highest level of satisficing as they cared a lot about who their suppliers were but were also dissatisfied with them. They were the only segment that had very low satisfaction ratings.

The Latent Shoppers segment (23%, no change) showed a below average level of care and average satisfaction ratings. However, they also presented an opportunity as they had lower confidence that they were on the best deal and slightly lower confidence that they had the information they needed to make a good decision.

The Unconvinced Shoppers segment (18%, up one point) exhibited below average care and a reasonable level of satisfaction with their electricity retailer. They had below average confidence that they would choose the right deal and average confidence that they had the information they needed. This could be linked to the fact that their electricity bill tended to be lower than average.

Complacent Shoppers (22%, down two points) had a high level of care about household suppliers but were also highly satisfied with the service they receive. They were highly confident in their choices which appeared to make them less likely to switch.

Informed Shoppers (22%, down one point) had higher than average care and satisfaction ratings. They were highly confident that they were on the best deal and had the information they needed to make a good decision. They were more likely to find it easy to switch and had switched or actively investigated different offers or plans which may be reinforcing the perception that they are on the best deal.

Continuum of care segments – personally care about choice of retailer/ satisfaction with retailer

Cynical shoppers	Latent shoppers	Unconvinced shoppers	Complacent shoppers	Informed shoppers
16% (up 3%)	23% (nc)	18% (up 1%)	22% (down 2%)	22% (down 1%)
– High care/ lowest satisfaction – Less confidence on best deal/ have information needed – More likely to value reviewing/ actively shopping around – More likely to state that they're likely to switch – Less likely to believe it is easy to compare different offers	– Low care and reasonably satisfied – Less likely to be decision maker – Less confident in choosing the right deal – Average likelihood of switching however less likely to actively investigate offers/ plans – Less likely to be aware of their monthly spend on electricity	– Reasonably satisfied and lower than average care – Lower level of confidence in choosing the right deal for household – Less likely to think it is worthwhile reviewing and actively shopping around so also less likely to state they would switch/ have switched – Less likely to be interested in a price comparison website – Appear to have lower electricity bills	– High satisfaction and high care – Less likely to think it is worthwhile reviewing electricity retailer and also less likely to say that it is likely they'll switch – Confident that they have all information they need to compare the different offers and confident that they'll choose the deal that is right for their household – Believe that it is easy to compare different offers	– High satisfaction and high care – More likely to be the decision maker and believe of switching and comparing offers is easy – High level of confidence in being able to choose the right deal and that they have all the information required to compare different offers – More likely to have switched or reviewed in the past 12 months – Are interested in visiting a price comparison website
– Middle-aged (45-59), have dependents, surf the net and regular social media user, less likely to keep up with business news	– Younger (18-29), Aucklanders, 3 or more adults in household, no children, working full time – Like to keep up with latest technology, go overseas at least once every couple of years, digitally connected (surf & social media)	– Older (60 plus), own home freehold, lived at current residence for more than 10 years – Highest percentage of retired – Lower percentages of keep up with technology, surf the net and social media	– Female, 30-44 years old, have dependents, close to half renting and close to one third have a mortgage – Less likely to be in full-time work and more likely to have no qualification or a secondary school qualification. – Surf the net, regularly use social media and read local community paper	– More likely to be Male, 60 plus with no dependents – Are mortgage free and have lived in their current residence for more than 10 years – Read newspaper, business news and community papers and go overseas every couple of years – Like to keep up with technology and often surf the net

Strong satisficing
(High level of care/ Low satisfaction)

Weak satisficing
(High level of care/ High satisfaction)

View of household suppliers

3.1 Satisfaction

■ Electricity retailer ranked mid-range, just below banks and mobile providers

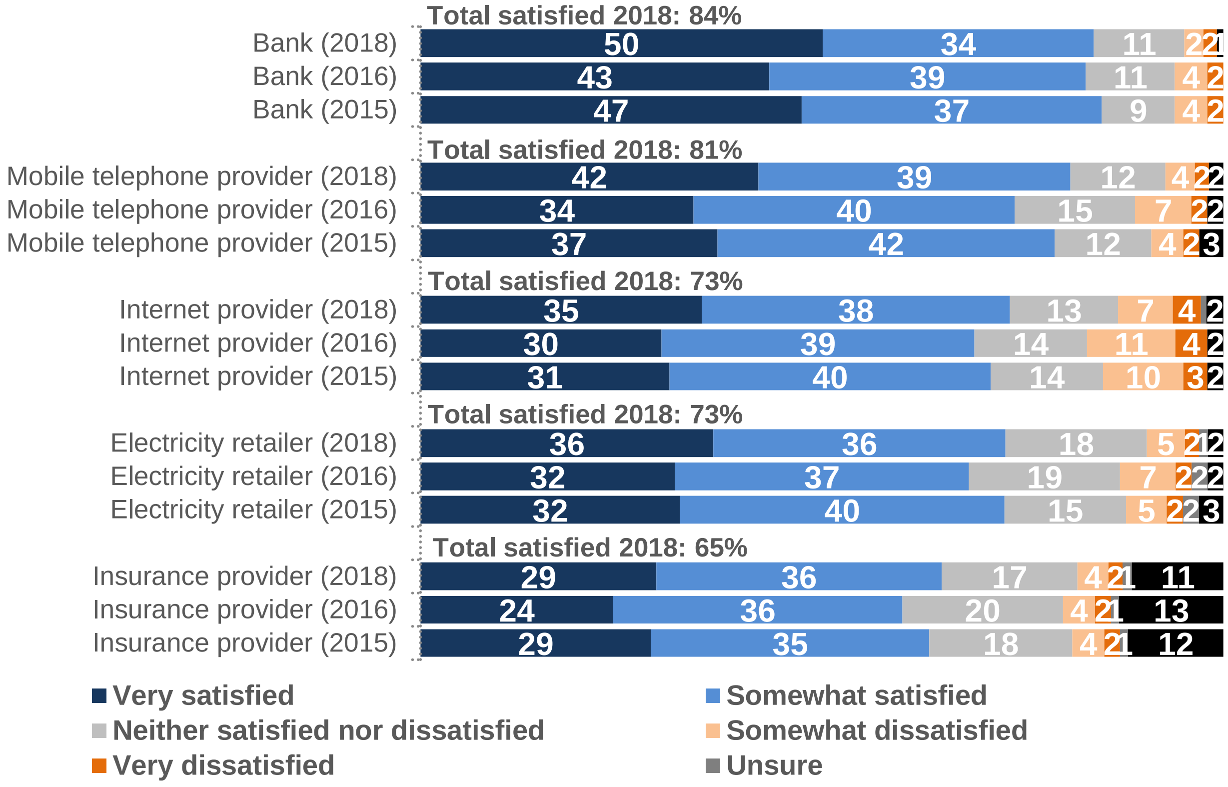
Seventy-three percent of respondents indicated they were satisfied with their electricity provider, up 4% from 2016. The same proportion (73%) were satisfied with their internet provider (also up 4% from 2016).

Banks were the highest rated household suppliers in terms of satisfaction. A majority (84%, up 2% from 2016) of respondents said they were satisfied (very satisfied + somewhat satisfied) with their bank. Around four-fifths of respondents were satisfied with their mobile telephone provider (81%, up from 74%).

Insurance providers rated lowest with 65% of respondents satisfied, up 5% from 2016.

A small proportion (2%) said that the questions on electricity provider were not 'applicable' and they were excluded from other relevant questions.

Satisfaction with household services



Base: All respondents (n=1,200)

Older respondents more satisfied with their electricity retailer

Older respondents (60 plus) were more likely to be satisfied with their electricity retailer (only 82% satisfaction).

Respondents who believed it was easy to switch providers were also more likely to be satisfied (79%) than those who thought it was difficult (68%).

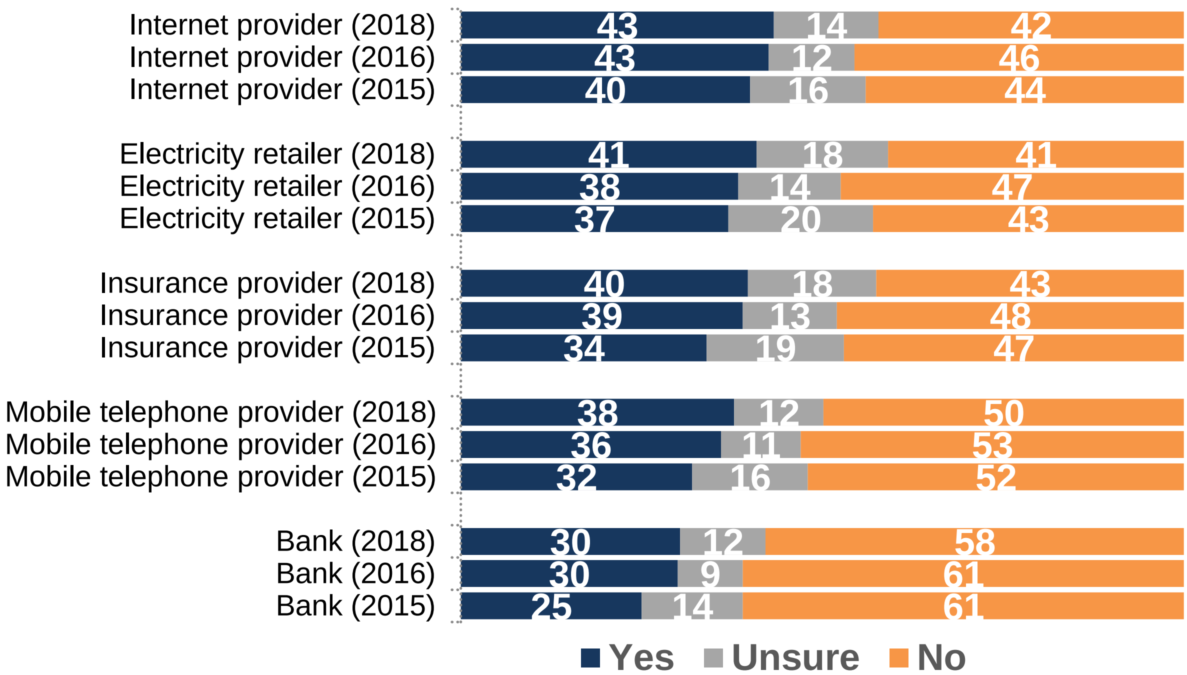
3.2 Worthwhile reviewing

Internet providers perceived as most worthwhile to review

Around two-fifths of respondents (43%, no change since 2016) said they think it is worthwhile reviewing their internet provider, with a slightly lower proportion believing it worthwhile for their electricity retailer (41%, up 3%). A similar percentage indicated it was worthwhile reviewing their insurance retailer (40%, up 1%). Thirty-eight percent (up 2%) stated that it was worthwhile reviewing their mobile telephone provider and 30% for their bank (no change since 2016).

Electricity retailers had one of the highest proportions who were 'unsure' (18%) and the lowest proportion of people (41%) who said that it was not worthwhile reviewing.

Worthwhile reviewing household services



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Those with dependent children more likely to think reviewing retailers worthwhile

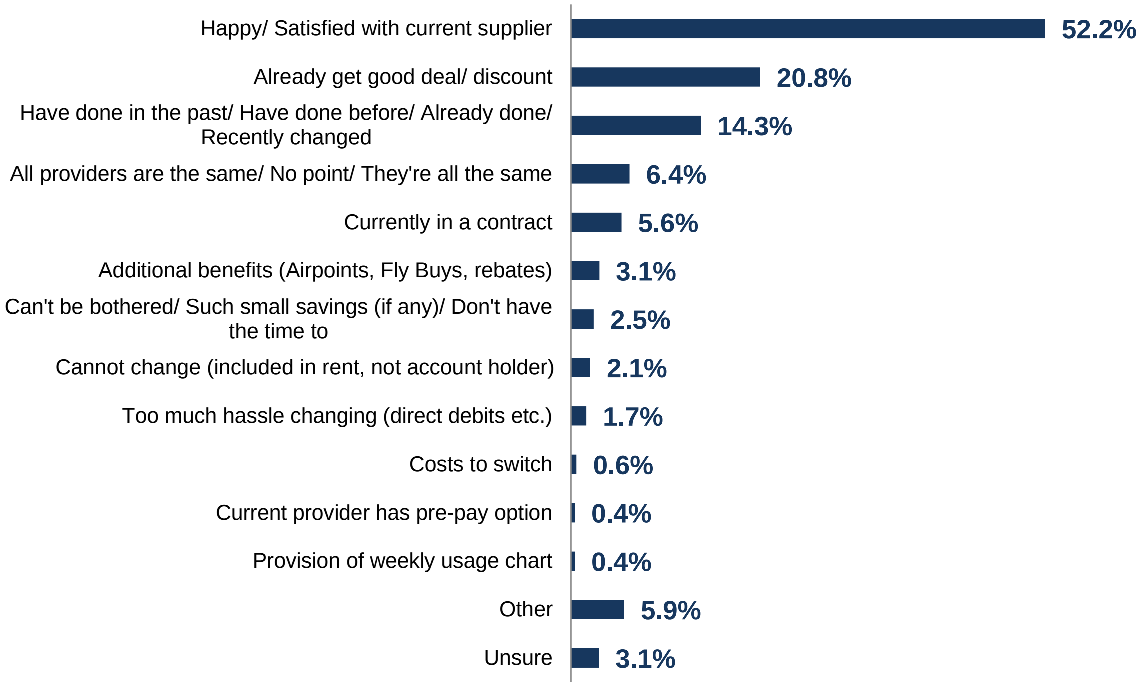
Those with dependent children (54%), in full time work (52%), that have a university qualification (51%), who go overseas at least once every couple of years (48%), who like to keep up with the latest technology (48%), and read the business news most days (47%) were all more likely to think it is worthwhile reviewing electricity retailers than those overall (41%).

There was high correlation across those that believed it was worthwhile to review the retailer with the following questions - dissatisfaction, likelihood to switch or having recently switched, thinking it is easy to switch, being the decision maker, and caring about the provider used.

Majority who think it not worthwhile reviewing are happy with their supplier

In line with previous years, for those who declared it was not worthwhile reviewing their electricity provider, the main reasons for this view were that they were happy with their current supplier (52%, 56% in 2016) or they already have a good deal (21%, 18% in 2016). This was followed by that they had already done so (14%, 13% in 2016) and that they felt all the providers were the same (6%, 7% in 2016).

Reasons not worthwhile reviewing electricity retailer



Base: Respondents who think it is not worthwhile to review their electricity retailer (n=483)
Note: Multiple response question

3.3 Worthwhile actively shopping around

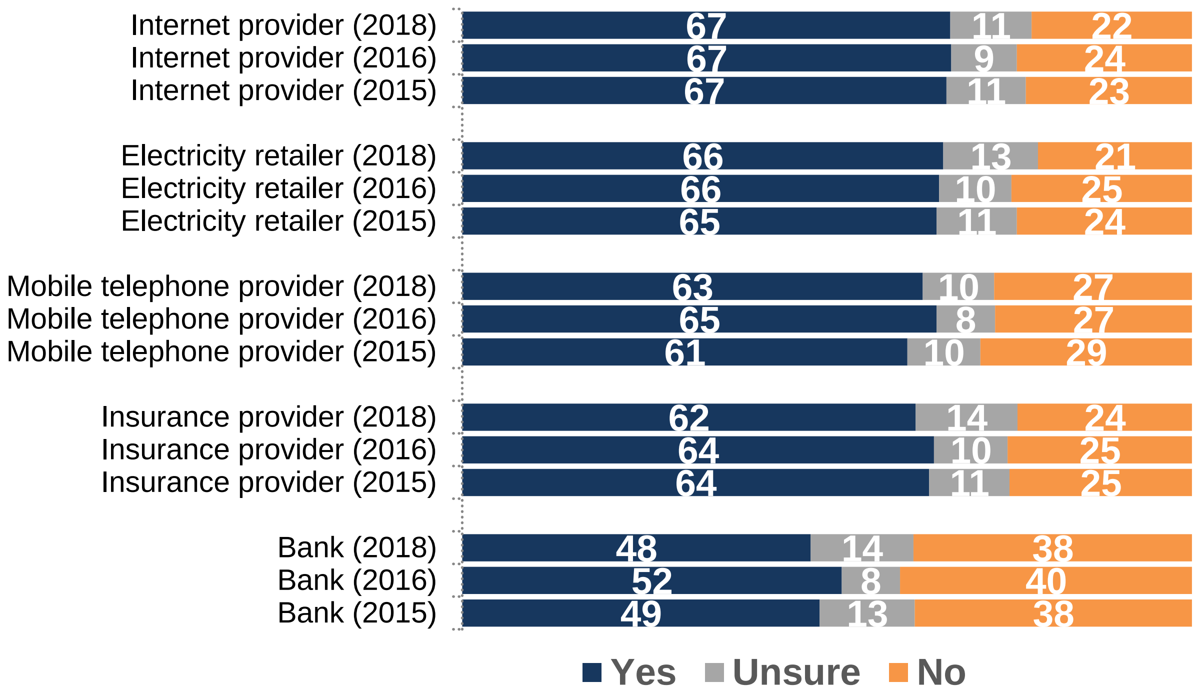
■ Two-thirds consider it worthwhile to actively shop around for electricity retailers

There were higher rates of people thinking it worthwhile to actively shop around for different household services compared to reviewing services. This year's figures were consistent with the 2016 and 2015 results.

Around two-thirds (67%, no change since 2016) said it was worthwhile actively shopping around for internet providers and 66% (no change since 2016) for electricity retailers.

A similar proportion of respondents thought that it was worthwhile actively shopping around for their mobile telephone providers (63%, down 2% from 2016), and insurance providers (62%, down 2% from 2016). Around half (48%, down 4% from 2016) thought it worthwhile actively shopping around for banks.

Worthwhile actively shopping around for household services



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Higher income households more likely to think actively shopping around for electricity retailer is worthwhile

There was a trend by household income, where 55% of people with incomes less than $40,000 and 73% of people with incomes over $40,000 thought it was worthwhile to shop around. There were also differences by age. Respondents over 60 were less likely to say it was worthwhile (52%) than their younger counterparts.

Respondents with full-time jobs (76%), those with dependent children (75%), those with university degrees (73%), people that like to keep up with the latest technology (72%) and people who go overseas every couple of years (70%) were all more likely to indicate it was worthwhile actively shopping around for electricity retailers.

As noted earlier, there was also high correlation with the question on whether it was worthwhile to review provider, along with, dissatisfaction, high likelihood of switching, being the decision maker, caring about the provider used, and having recently switched retailer.

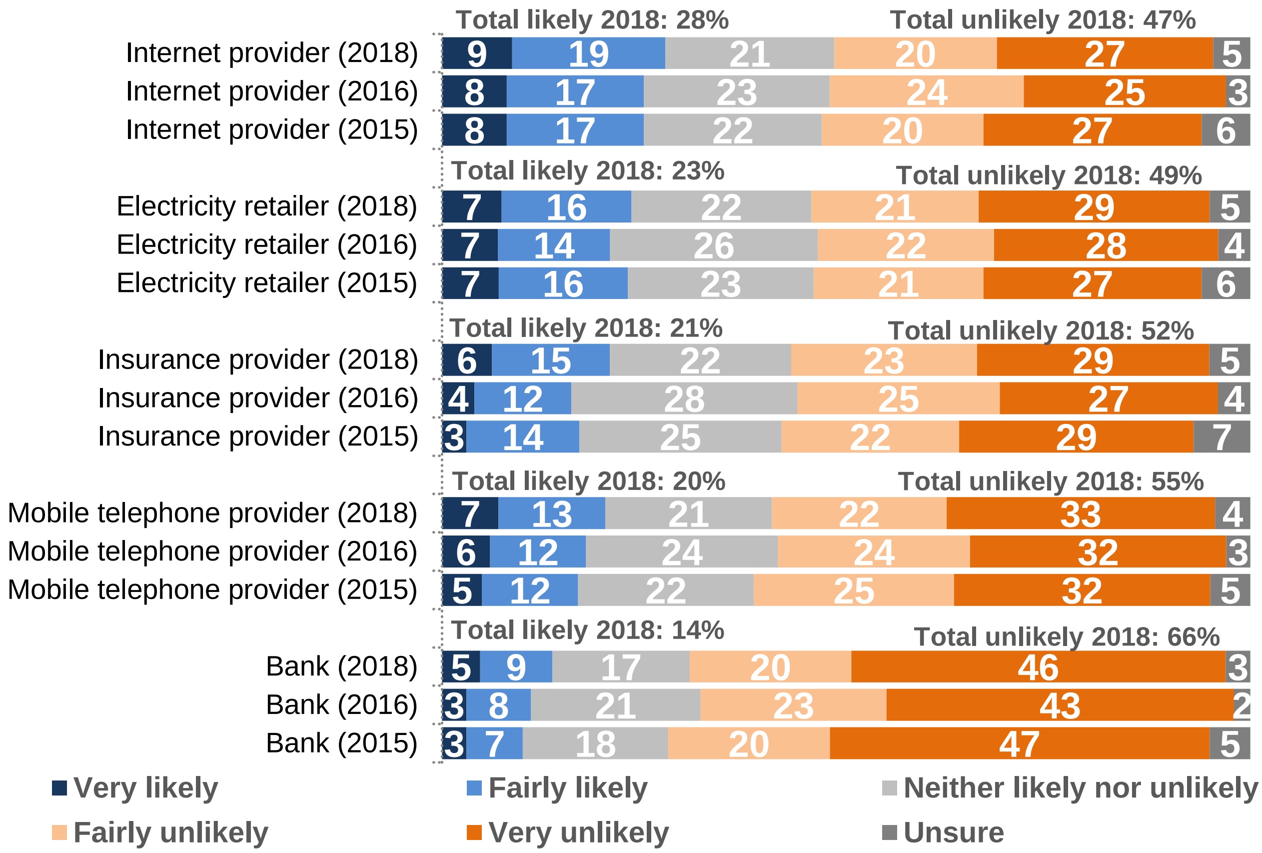
3.4 Likelihood of switching

■ One in five respondents likely to switch electricity retailers

The proportion of respondents indicating they were likely to switch providers was slightly higher compared to previous years.

In terms of total likelihood (very likely + fairly likely) of switching, people were most likely to consider switching internet provider. Over a quarter of people said they would be likely to switch their internet provider, 23% for electricity retailer (up 2% from 2016), 21% for insurance provider (up 5% from 2016), 20% (up 2% from 2016) for mobile phone provider, and 14% for their bank (up 3% from 2016).

Likelihood of switching household services



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Overs 60s lower likelihood of switching

There was a general trend in terms of age, as age increases the percentage of respondents that indicated it was likely they would switch decreases. Older respondents were more likely to indicate they would not switch, with 65% of those over 60 years unlikely to switch electricity retailer compared to 43% of people below 60.

Those with dependent children (35%), those who work full time (33%), those who have a university qualification (30%), and those that read the business news most days (30%) were more likely to switch their electricity retailer.

Those who think it worthwhile to review and actively shop around for electricity retailers are more likely to switch their electricity retailer (45% and 33% respectively). Also, 27% of people who declared that switching is easy were likely to switch.

Those who were confident they have the information they need to compare the different offers available were less likely to switch (20%) than people who said they were not confident (35%).

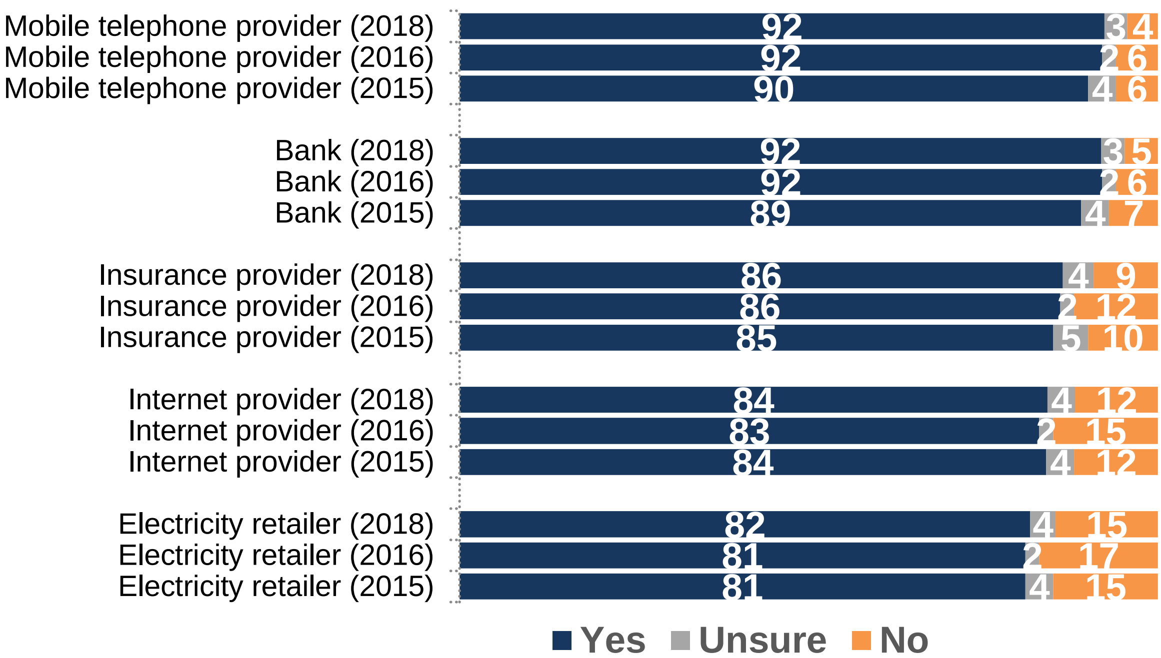
3.5 Decision maker

■ Four in five respondents are the decision maker for electricity retailer

A clear majority made the decision or had input into choosing their bank provider and their mobile telephone provider (both 92%). For insurance this was 86%, internet provider 84% and electricity retailer 82%. These results were on par with previous years.

For the electricity retailer, age was a significant factor of whether the respondent was a key decision maker; 59% of people under 30 compared to 86% of people 30-59 and 93% of people 60 and over indicated they contribute to the decision. Respondents who were living with three or more adults (69%) were less likely to be decision makers.

Decision maker for household services



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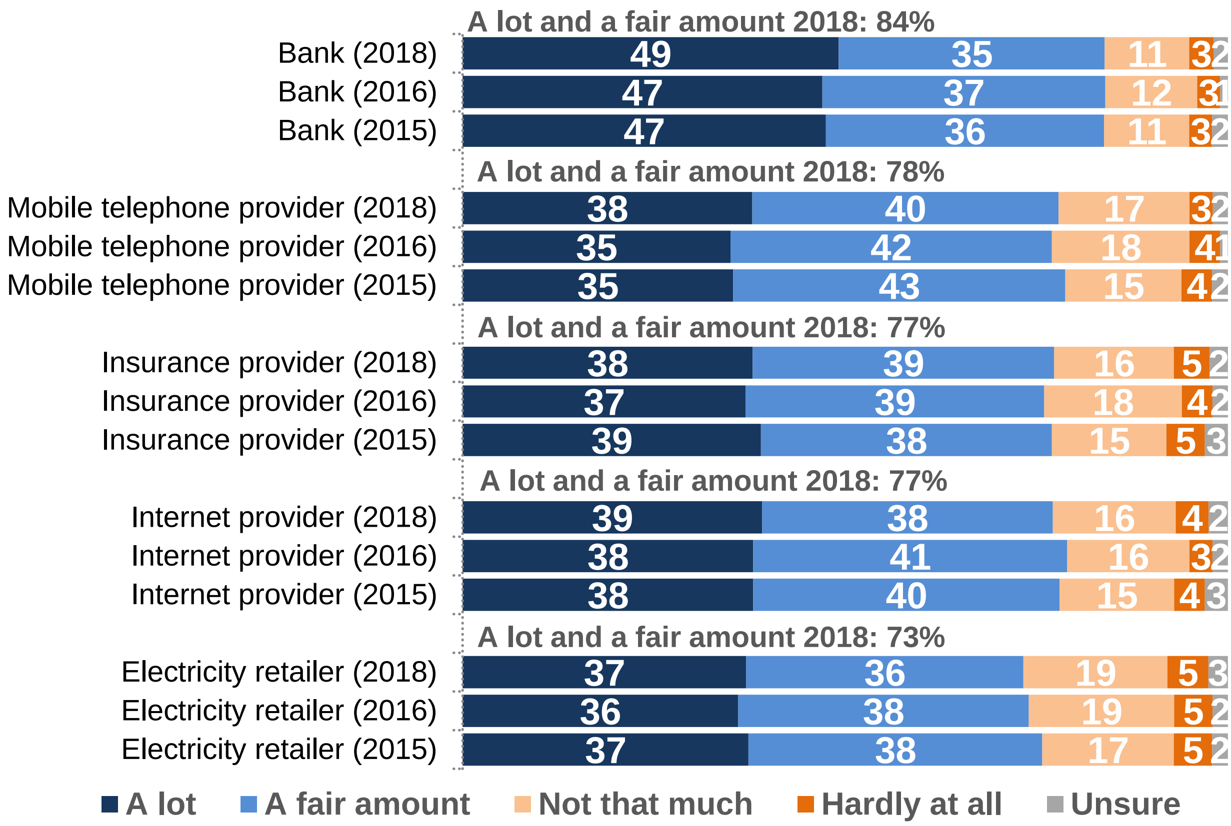
3.6 Level of 'care'

Electricity retailer had lowest levels of care

The level of care when choosing household suppliers was very similar to previous years, with all services receiving similar ratings.

For banks, 84% said they care a lot or a fair amount about their choice, 78% care about their mobile provider, 77% about their insurance provider and 77% about their internet provider. Respondents showed the lowest level of care for their electricity retailer at 73%.

Level of 'care' associated with household services



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Decision makers have higher levels of care

Respondents who identified themselves as making the decisions or having input into the choice of electricity retailer were more likely to say they care a lot or a fair amount about which supplier they choose; 78% of decision makers care in contrast to 51% of people who are not.

Those over sixty were more likely to care about the electricity retailer they choose (80%) compared to those under 30 (62%).

Those who were likely to switch (83%), believed it was easy to switch (79%) and think it is worthwhile actively shopping around (77%) were all more likely to care about the electricity supplier they choose.

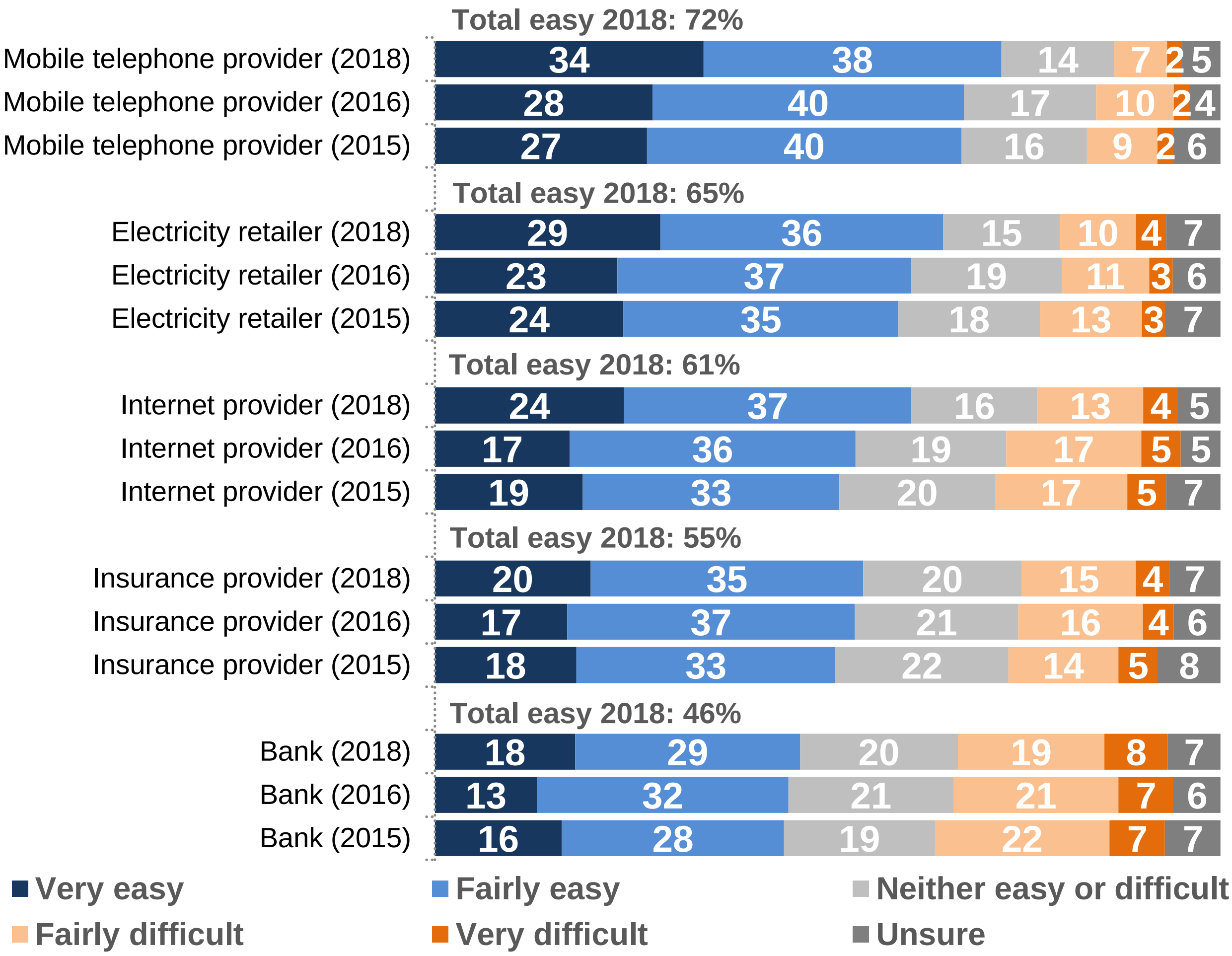
3.7 Ease of switching

■ Majority think it is easy to switch electricity providers

Close to three-quarters (72%) of respondents thought switching mobile phone providers was very easy or fairly easy. Around two-thirds of respondents (65%) indicated that switching electricity retailers was easy (29% very easy and 36% fairly easy).

Internet and insurance and providers had slightly lower levels of perceived ease of switching (61% and 55% respectively) and banks were much lower on 46%.

Ease of switching household services



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Those likely to switch found switching easier

Those likely to switch were more likely to rate switching as easy, with 78% reporting switching electricity retailers was very easy or fairly easy compared to 63% of those who were not likely to switch.

Those who were confident about the information they can access, thought it was worthwhile reviewing or actively shopping around, were satisfied with their electricity retailer, were decision makers, and care about their supplier were all more likely to think switching was easy (all between 69-72% total ease).

3.7.1 Reasons why switching perceived easy

Knowledge the new supplier will help

The most frequently cited reason for those believing it was easy to switch electricity retailers was that the new supplier will do most of the work for you (23%, 28% in 2016). The next most cited reason (17%, no change since 2016) was that it just takes a couple of phone calls, followed by that the respondent had already done so in the past and found it easy (13%, 17% in 2016), and that it is a simple online process (10%, 8% in 2016).

The competition in the electricity market, not being locked into a contract, switching electricity retailers requires little effort, and the incentives or deals offered to switch featured at lower levels (all 5-7%).

Reasons why easy to switch electricity retailer

Base: Respondents who think it is fairly easy or very easy to switch electricity retailer (n=769)
Note: Multiple response question

3.7.2 Reasons why switching perceived as difficult

Concern over effort and costs involved in switching

The three most commonly mentioned reasons why switching was viewed as difficult was that it takes too much effort (15%), that they were currently on a contract (15%) and the disconnection and other fees that are involved with switching (15%). Thirteen percent cited that they would need to research options available and would find it hard to know the true cost and therefore get the best deal.

Other reasons given were the amount of time it takes, satisfaction with current provider and that something could go wrong in the process of switching (all 5-7%).

Reasons why it is difficult to switch electricity retailer

Why do you think it is difficult to switch electricity retailer?

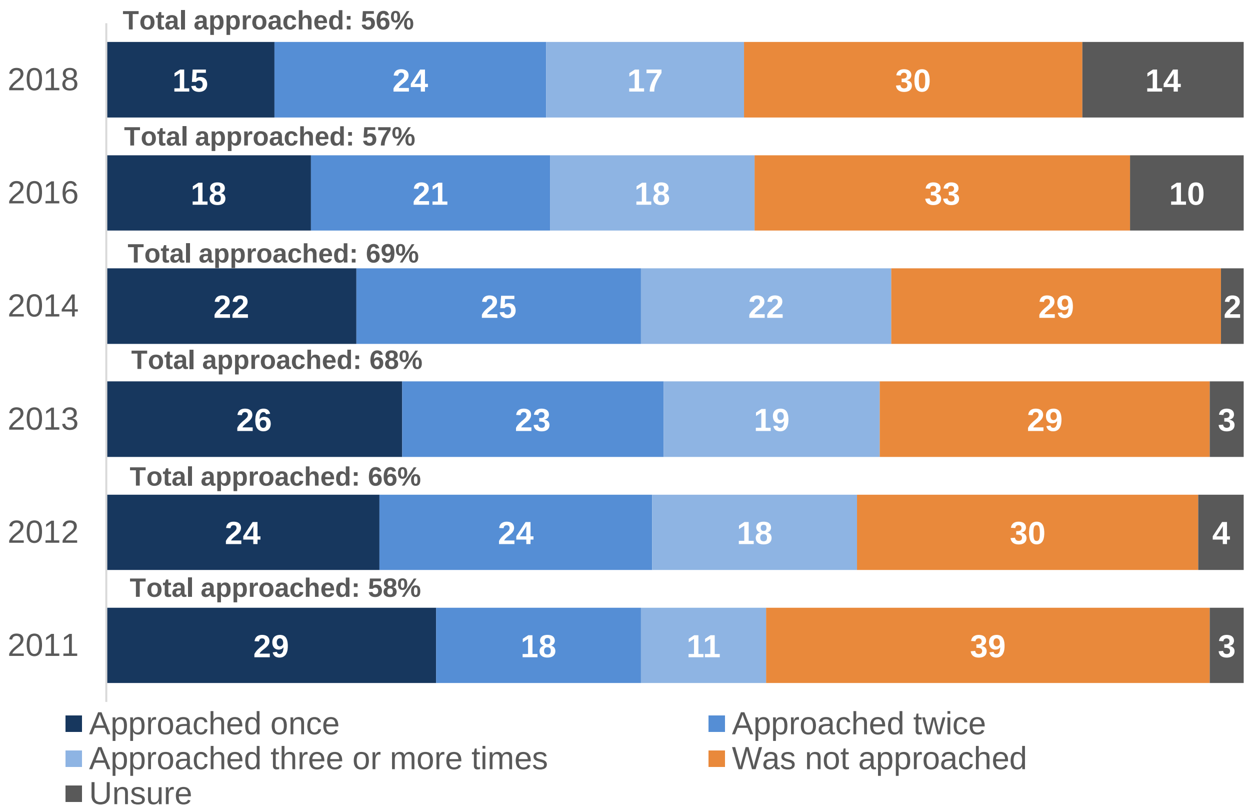
	All %
Hassle/ Too much effort	14.9
Currently on a contact	14.7
Contract break fee/ Disconnection fees/ Other fees/ Hidden costs	14.6
Would need to do research/ Would need to look into options/ Difficult to know true costs long term	12.7
Time	6.9
Satisfied with current provider/ Okay with current provider/ No need to change	6.8
Something could go wrong/ Don't want hassle if something goes wrong/ Like to keep things simple/ Power cut off	5.1
Not my decision	4.5
Long process/ Don't like the process	3.9
Paperwork	3.1
Because you have to cancel current retailer	1.9
Current provider can make it hard	1.9
Limited suppliers in my area/ Boundary issues	1.3
Have solar connection/ A pay back deal with provider	1.2
Have poor credit rating	1.2
Past experience/ Have tried in the past	0.6
Currently on pre-pay	0.6
Have been with current provider for quite some time/ Like long term history	0.6
Have heard negative stories	0.6
Other	5.2
Unsure	11.5

Base: Respondents who think it is fairly difficult or very difficult to switch electricity retailers (n=159)
Note: Multiple response question

3.8 Approached by electricity retailers to switch

Direct retailer activity appears to have declined, recording its lowest level since 2011. This year, around three in five respondents (56%) indicated they were approached about switching in the last two years, down 13% from 2014. Fifteen percent of respondents indicated they were approached once (down 7% from 2014), around a quarter (24%) said they were approached twice (down 1% from 2014) and seventeen percent stated they were approached three times in the last two years (down 5% from 2014). While close to a third (30%) said they were not approached over the last two years and 14% were unsure.

Number of companies that approached consumers to switch

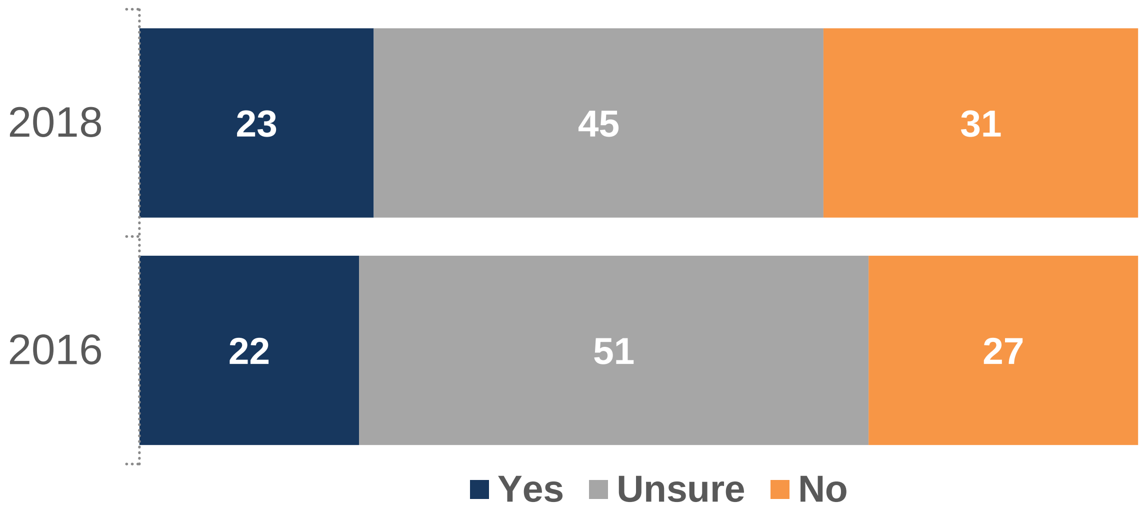


2016-2018 Base: All respondents (n=1,200)
2011-2014 Base: All respondents (n=1,000)

3.9 Variable plan

Close to a quarter (23%, up 1% from 2016) of respondents were aware that the price they pay per unit of electricity varies throughout the day. A little under half of the respondents (45%) indicated they were unsure and around a third (31%) said the price per unit of electricity does not change throughout the day.

Respondents who think it is worthwhile reviewing electricity supplier were more likely to state they were aware the price they pay per unit of electricity varies throughout the day (28% compared to 23% overall).



Base: All respondents (n=1,200)

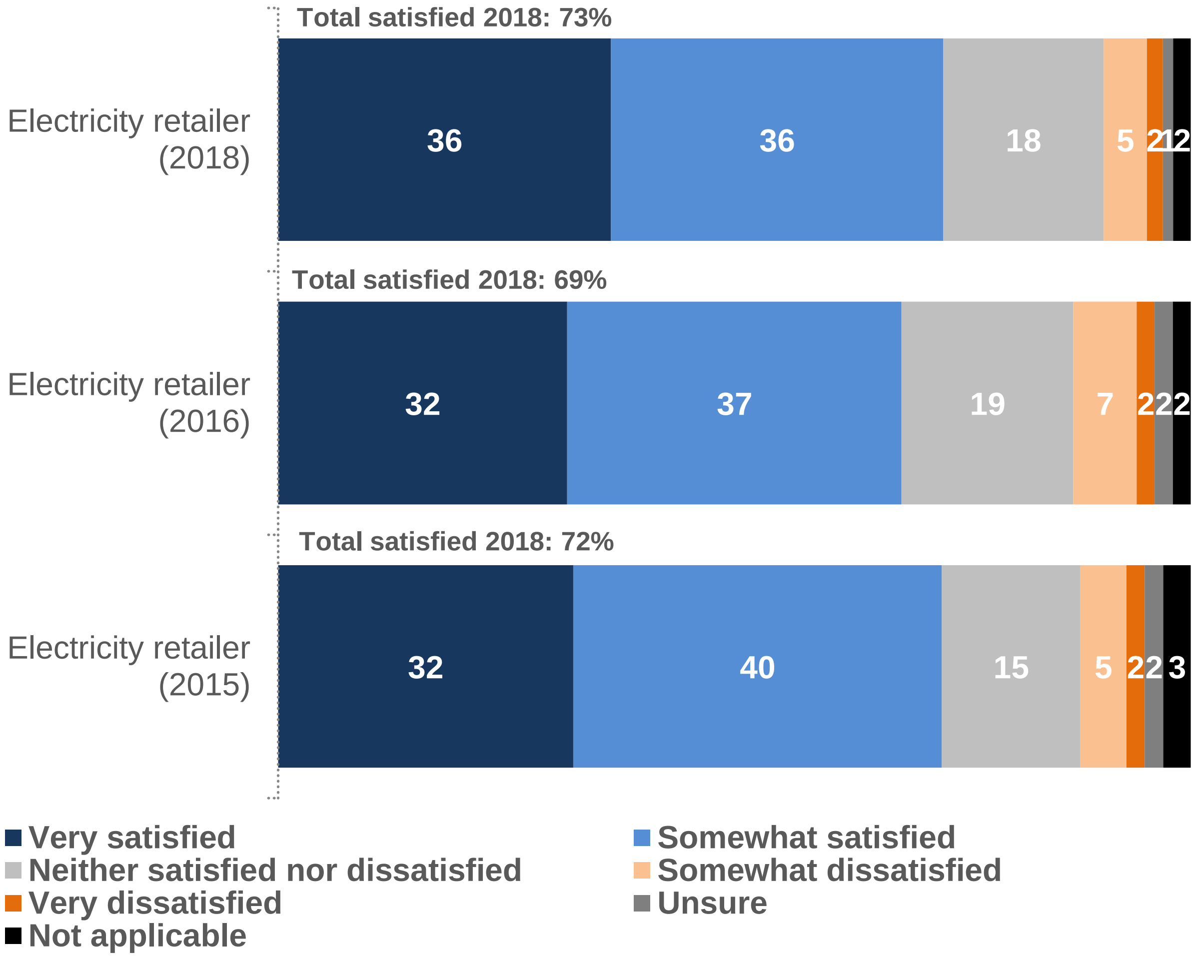
View of retailer

4.1 Satisfaction with retailer

■ Majority satisfied with retailer, increased slightly from 2016

Seventy-three percent of respondents indicated they were satisfied with their electricity provider, up 4% from 2016.

Satisfaction with electricity retailer



Base: All respondents (n=1,200)

4.2 Electricity retailer attribute ratings

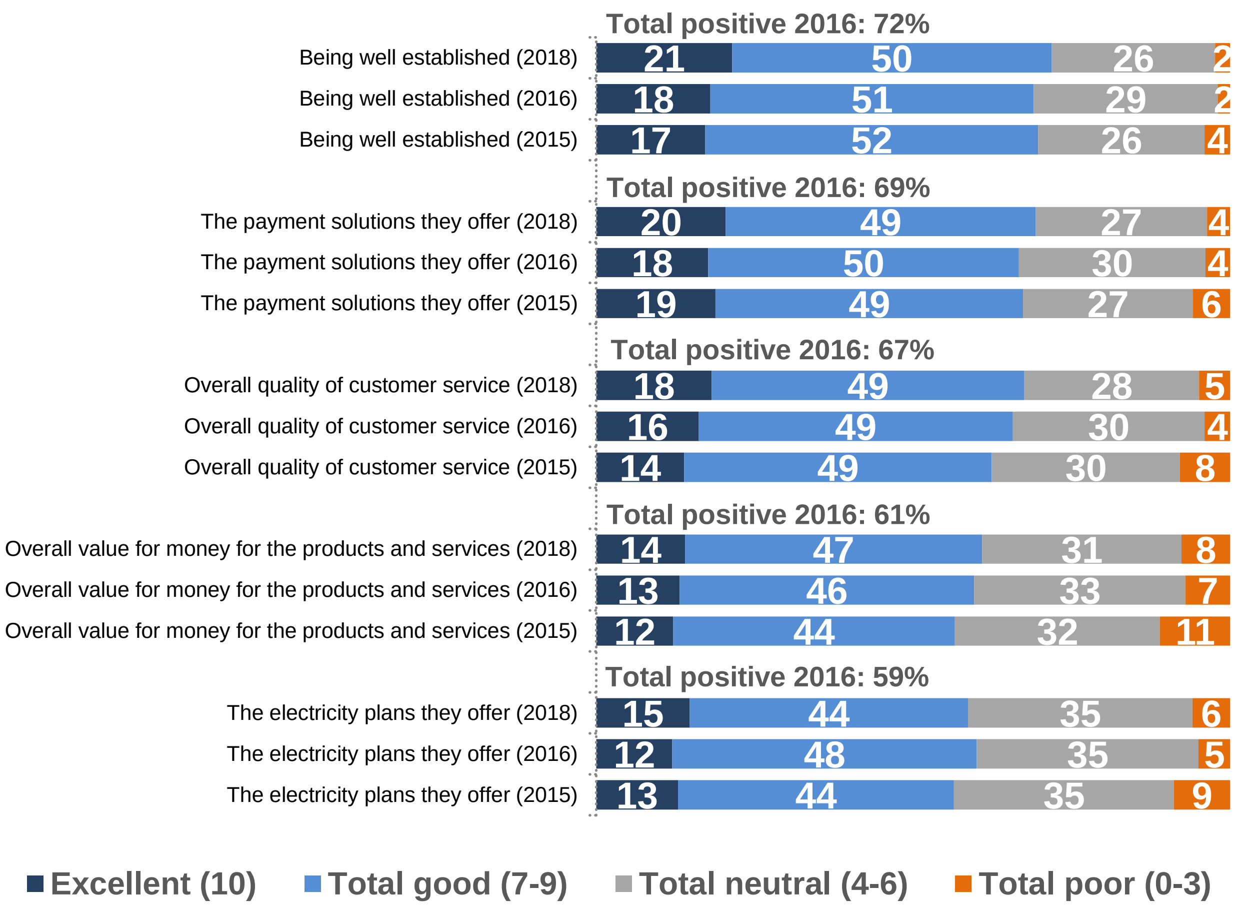
A majority rated their retailer positively

The results this year were consistent with previous years, with small increases in some attributes. Each attribute had a majority of respondents giving their electricity retailer a positive rating.

'Being well established' and 'the payments solutions they offer' had the highest positive ratings of 72% and 69% respectively (7-10, on a 0-10 scale where 10 is excellent and 0 is very poor). Around two-thirds (67%) gave their electricity retailer a positive rating for the 'overall quality of customer service'. Three in five respondents (61%) gave the 'overall value of money for the products and services' a positive rating and a similar percentage (59%) gave 'the electricity plans they offer' a positive rating.

There was a trend throughout, with decision makers giving higher positive ratings than non-decision makers. A similar trend was evident among those who care about which electricity retailer they choose; they gave higher positive ratings than those who do not care.

Electricity retailer attribute ratings



Base: All respondents (n=1,200)

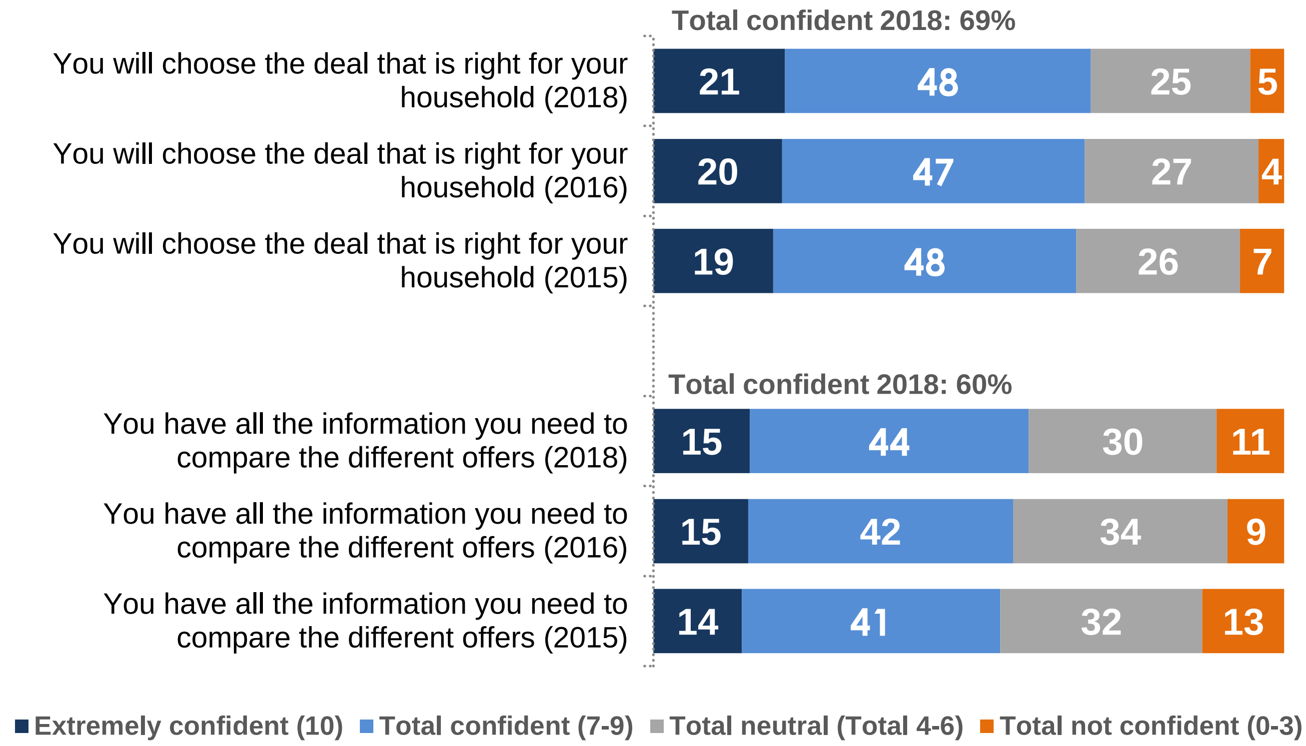
4.3 Confidence in choosing and comparing deals

Majority confident about having information to compare and choose the right deals and offers

A little over two-thirds (69%) of respondents were confident that they will choose the right deal for their household (combined 7 to 10, on a scale where 10 is extremely confident and 0 is not confident at all). A minority (5%) said they were not confident (0 to 3 on the same scale).

Three-fifths of respondents (60%) were confident that they have all the information they need to compare the different offers. While around one in ten respondents indicate they were not confident.

Confidence – choosing and comparing deals and offers



Base: All respondents (n=1,200)

Confidence highly correlated with other positive factors

Confidence in choosing the deal that is right for them was much higher among those who were unlikely to switch, were satisfied with their current provider, care about which electricity retailer they choose, find switching easy, and are the decision maker (75%-82%).

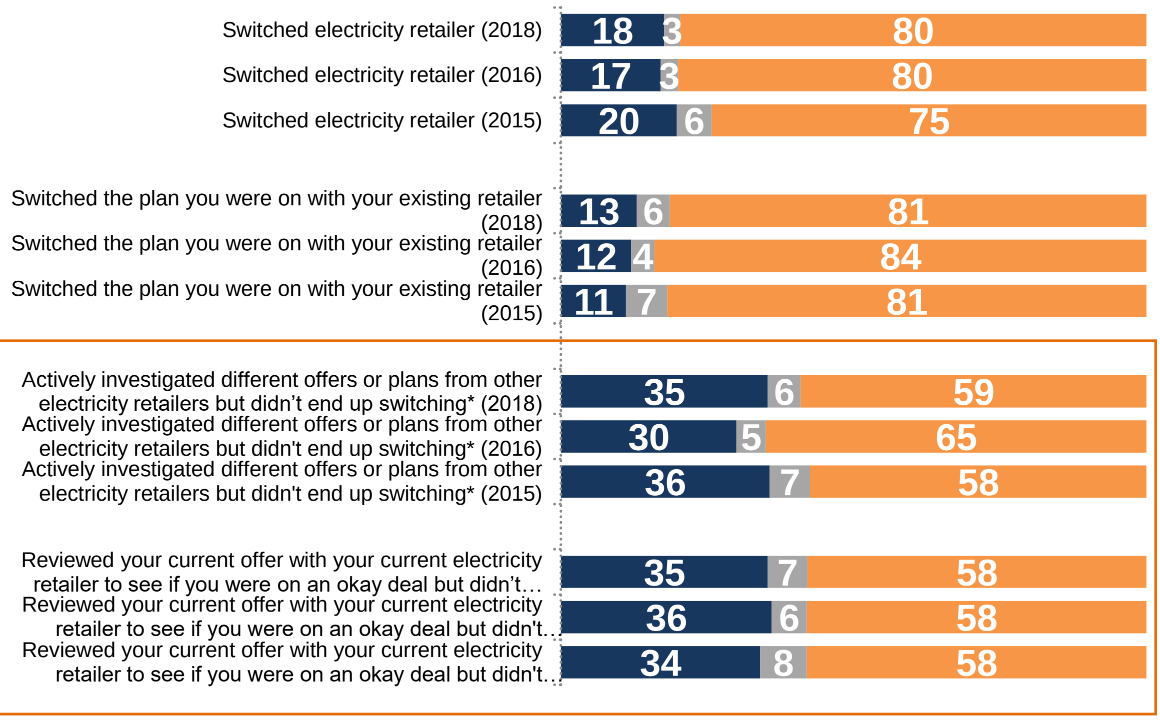
Confidence in having all the information needed to compare different offers was higher among those who were unlikely to switch, were satisfied, find switching easy, care about which electricity retailer they choose, and are the decision maker (64-72%).

Reviewing and shopping around

5.1 Actual behaviour – reviewing and shopping around

Thirty-five percent (up 5% from 2016) actively investigated different offers or plans from other electricity retailers but did not end up switching. Over a third of respondents (35%) indicated they reviewed their current offer with their retailer but did not switch (down 1% from 2016). This amounts to 390 respondents who either investigated or reviewed their plan or other offers but did not switch after doing so (33% of the overall sample). In total 58% made a choice to review or switch their plan or provider in the last year (similar to the figure in 2015, 59%). In the 2016 survey 55% of respondents made a choice to review or switch their plan or provider in the previous 12-month period.

Actual behaviour – reviewing, shopping around, switching behaviour



Base 2015-2018: All respondents (n=1,200)
**Base 2018: Respondents who did not switch retailers (n=988)*
**Base 2016: Respondents who did not switch retailers (n=1,000)*
**Base 2015: Respondents who did not switch retailers (n=963)*

5.2 Information sources

■ Majority used a price comparison website

Across reviewers that had not switched, the most common information sources used were a price comparison website (51%, down 5% since 2016), looking at the price/best price/saving (40%, up 12%), a retailer's website (34%, down 5%), and a general internet search (31%, down 11%). All the other resources had levels of use of 21% or below.

When asked which information sources had been most useful, a price comparison website was considered most useful (34%, down 1%), followed by looking at the price/best price/saving (11%, up 2%), using a retailer website (11%, up 1%) and an internet search (10%, down 2%).

Information used in decision making – Tracking

Reviewing	*When reviewing your current electricity deal or investigating different electricity offers and plans what information sources did you use?**			*Thinking about the information sources you used when investigating different retailers or plans, which one was most useful in helping with your decision whether or not to switch?*		
	2015	***2016***	***2018***	***2015***	***2016***	***2018***
Base: n=	***388***	***372***	***390***	***388***	***372***	***390***
Price comparison website	55.7	55.4	50.9	38.6	35.0	34.2
Looked at price/best price/saving	29.8	28.0	40.4	8.3	8.3	10.8
Retailer website	35.8	38.5	33.9	8.9	9.8	11.0
Google/general internet search	45.0	42.7	31.2	12.5	11.7	10.0
Received a call from a sales person	23.0	22.0	21.3	6.8	5.7	5.1
Door-to-door sales person visiting the home	17.8	23.7	18.5	5.6	7.4	6.2
A friend or family member	17.8	18.4	18.4	3.6	2.7	5.2
Phoned the retailer	9.5	14.6	13.0	3.5	6.7	5.6
General advertising e.g. TV, Radio, Newspaper advertisement	11.7	13.5	11.9	1.2	1.9	1.5
Brochures/flyers and other direct mail	23.4	21.3	9.8	4.0	4.6	1.8
Media article/advertisement segment	5.1	4.6	6.7	0.2	-	0.5
Outdoor advertising e.g. billboards, buses	1.8	2.3	2.1	-	-	0.5
Community support organisation	1.5	1.3	1.8	0.6	0.5	0.5
Financial counsellor	-	0.6	1.0	-	0.3	0.5
Other	3.4	2.6	2.3	1.9	1.9	1.8
Unsure	2.3	2.0	2.1	2.3	2.0	2.1
None of them were useful	3.1	1.6	2.6	2.0	1.6	2.6

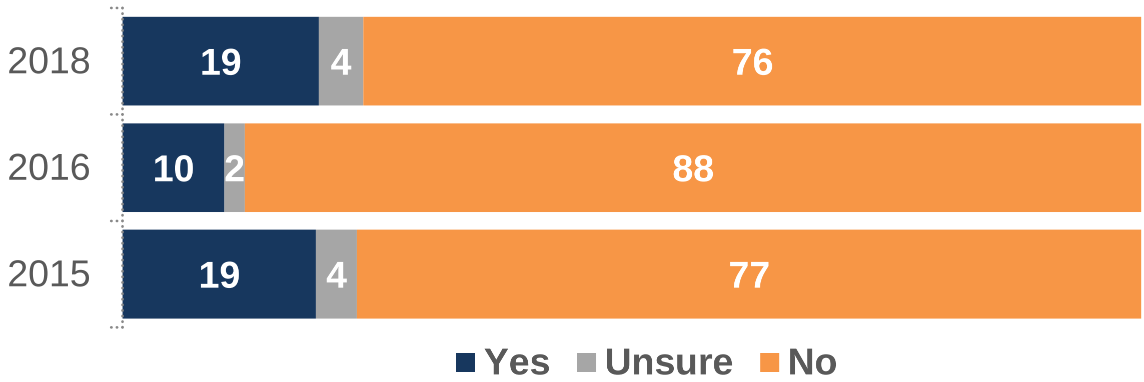
Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan
*Note: Multiple response question

5.3 Actions taken after reviewing information

■ One in five of those who reviewed or shopped around took some action

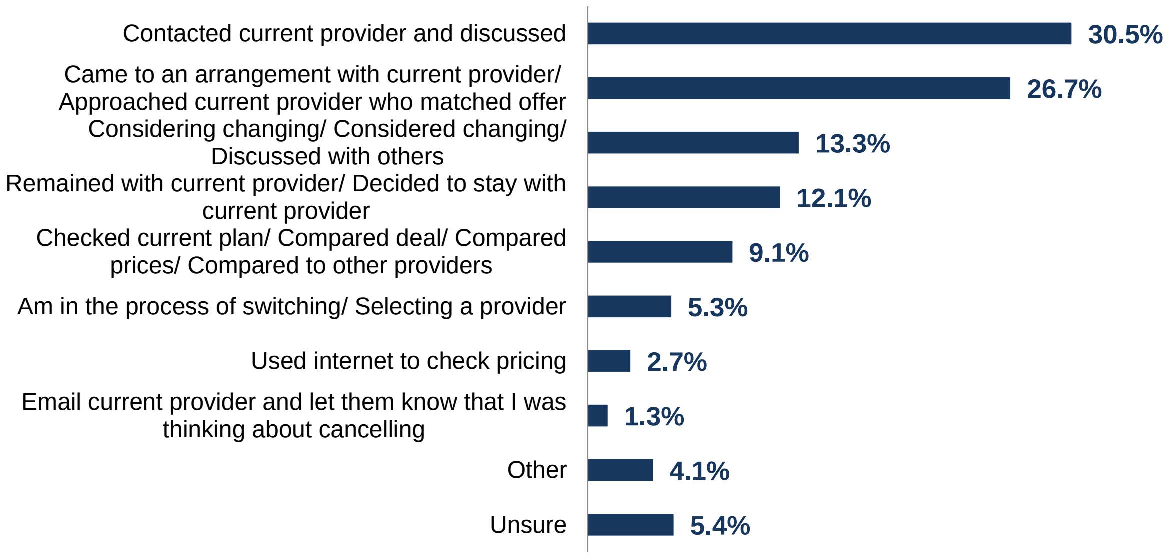
This year, a higher proportion of respondents had taken action after reviewing or shopping around. Around one in five of those who reviewed or shopped around took some action (up 9% from 2016).

Of the small sample of those reviewers who took action 31% mentioned that they contacted their current provider and discussed their plan and 27% mentioned that they came to an agreement with their current provider. This was following by those that they considered changing and discussed with others, that they decided to stay with current provider, and that they compared prices or checked current plan cited by between 9-13%.



Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan (2015 n=388 and 2016 n=372, 2018 n=390).

What action did you take with this information?



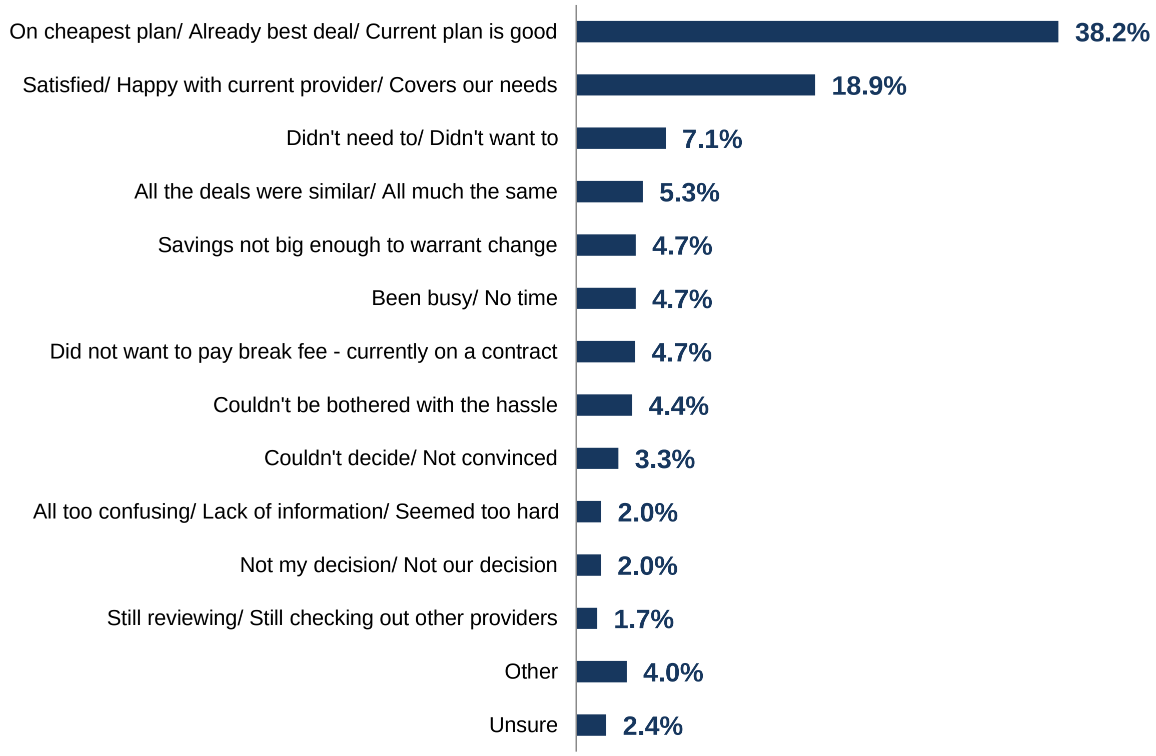
Base: Respondents who took action after reviewing information (n=75)
Note: Multiple response question

Majority could not improve on current plan

Three-quarters of those that reviewed or shopped around did not take any action (down 12% from 2016).

Of these, 38% mentioned they were already on the best deal and could not improve on their existing plan. Followed by 19% who mentioned they were happy with their current provider, 7% cited they did not need or want to switch, and 5% mentioning the deals were all similar. All the other reasons rated by less than 5% of the subsample.

Reasons took no action



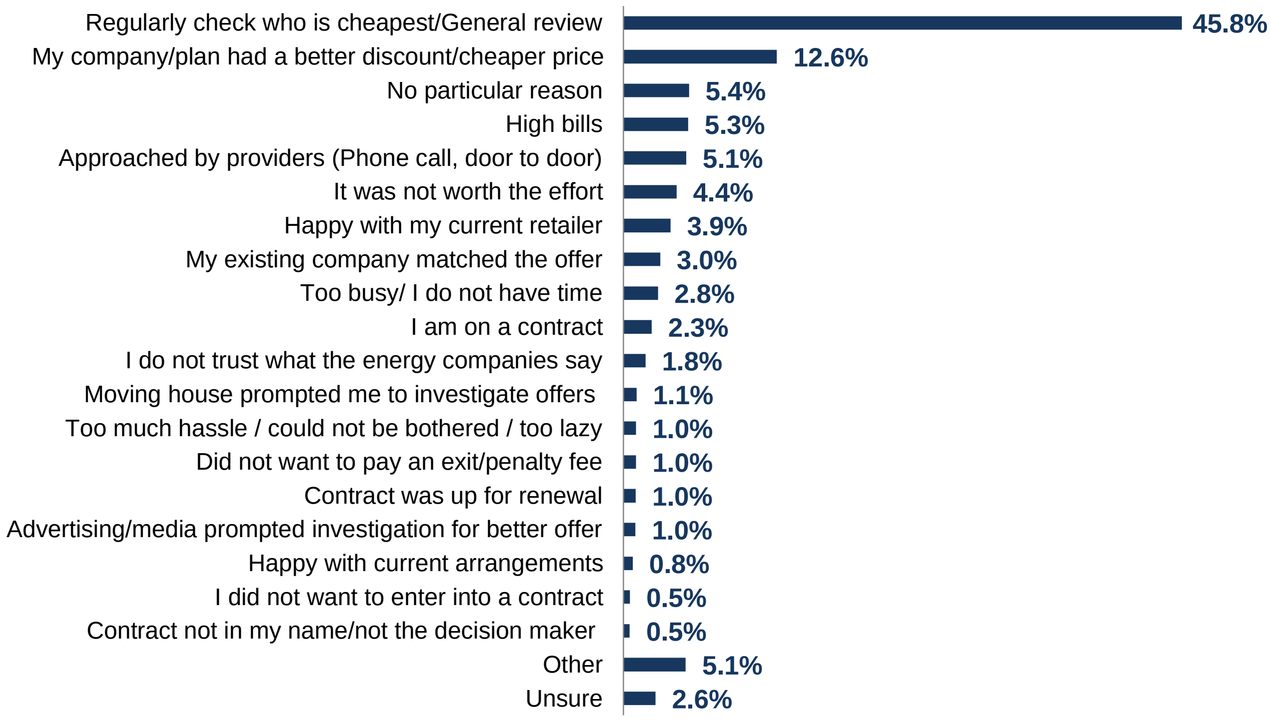
Base: Respondents who did not take action after reviewing information (n=298)
Note: Multiple response question

Regular checking main reason for not switching

The main reasons given for not switching after reviewing or shopping around were that they regularly check who is the cheapest (46%, no change since 2016) and that their current provider was cheaper (13%, down 5%). Five percent mentioned they reviewed because of a high bill and because they were approached by providers while five percent mentioned that there was no particular reason for not switching electricity providers.

Following on from this between 3-4% did not believe it was worth the effort, they were happy with their current retailer, that their current company matched the offer in order to keep them or that they did not have the time. All other various reasons were given by 2% of the sample or less.

Reason investigated or reviewed deal but did not change plan or provider



Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch or change their plan (n=390)
Note: Multiple response question

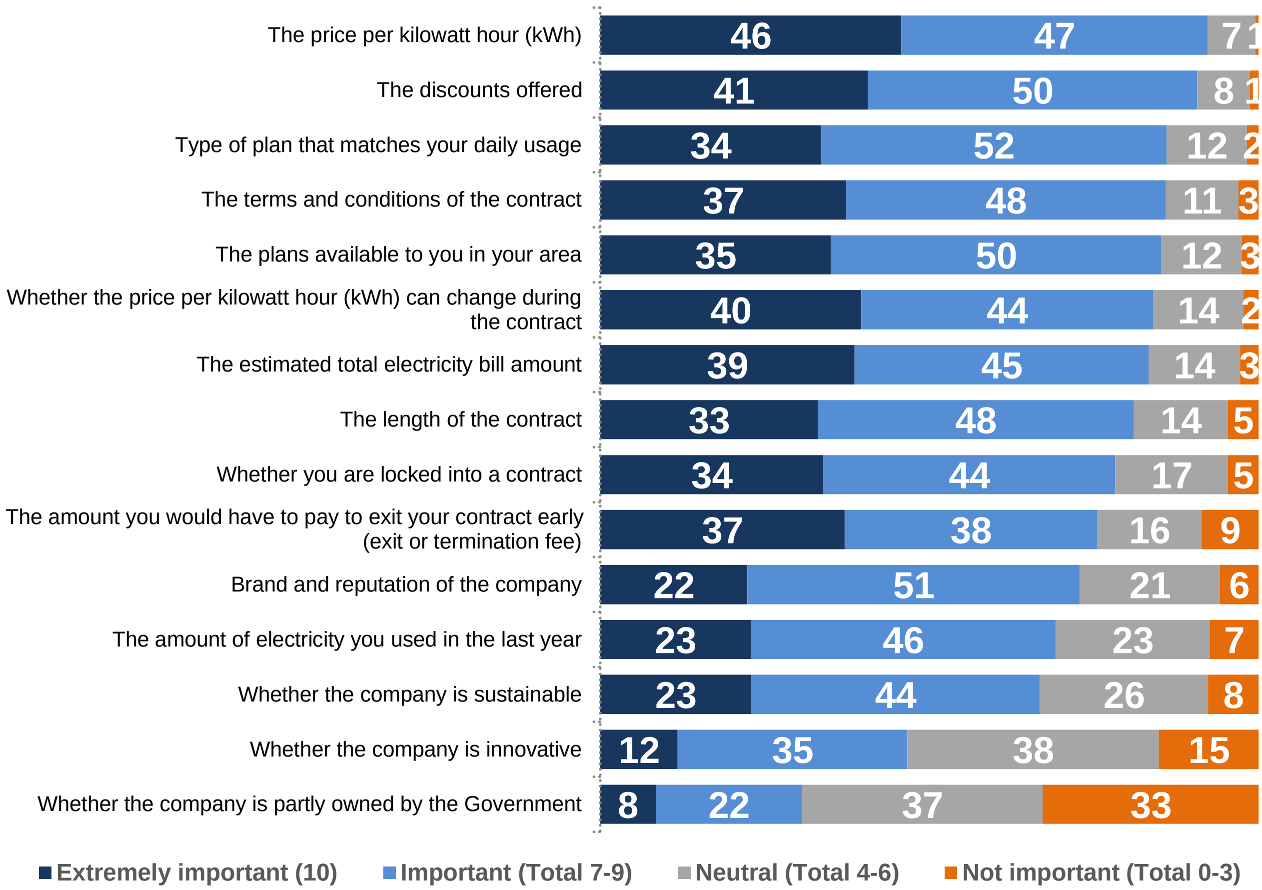
5.4 Switching factors: reviewers

■ Most important factors if considering switching were price related

For reviewers, the important factors to weigh up if switching were mostly price related. A vast majority (92%, up 3%) of reviewers gave an important rating (7-10, on a 0 to 10 scale where 10 is extremely important and 0 is not at all important) for the price per kilowatt hour with 46% saying it was extremely important. The discounts offered were also rated important by the majority of respondents (91%, up 2%). The terms and conditions of the contract and the type of plan that matches your daily usage were rated important by 86% of respondents. Followed by the plans available to you in your area, whether the price per kilowatt hour (kWh) can change during the contract and the estimated total electricity bill amount were all between 83% and 85%.

Similar to the previous survey the least important factors were related to brand and reputation – whether the company is innovative and whether it is partly government owned, 47% and 31% respectively.

Switching factors – by those who reviewed or actively investigated



Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan (n=390)

Switching factors – by those who reviewed or actively investigated – Tracking

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	2015 TOTAL IMPORTANT (7-10) %	2016 TOTAL IMPORTANT (7-10) %	2018 TOTAL IMPORTANT (7-10) %
Base: n=	*388*	*372*	*390*
The price per kilowatt hour (kWh)	**92**	**89**	**92**
The discounts offered	**88**	**89**	**91**
The terms and conditions of the contract	**85**	**84**	**86**
Type of plan that matches your daily usage	**88**	**88**	**86**
The plans available to you in your area	**84**	**83**	**85**
Whether the price per kilowatt hour (kWh) can change during the contract	**86**	**83**	**84**
The estimated total electricity bill amount	**88**	**86**	**83**
The length of the contract	**78**	**78**	**81**
Whether you are locked into a contract	**77**	**81**	**78**
The amount you would have to pay to exit your contract early (exit or termination fee)	**79**	**74**	**75**
Brand and reputation of the company	**64**	**67**	**73**
The amount of electricity you used in the last year	**70**	**70**	**69**
Whether the company is sustainable	**68**	**65**	**67**
Whether the company is innovative	**43**	**47**	**47**
Whether the company is partly owned by the Government	**26**	**33**	**31**

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan

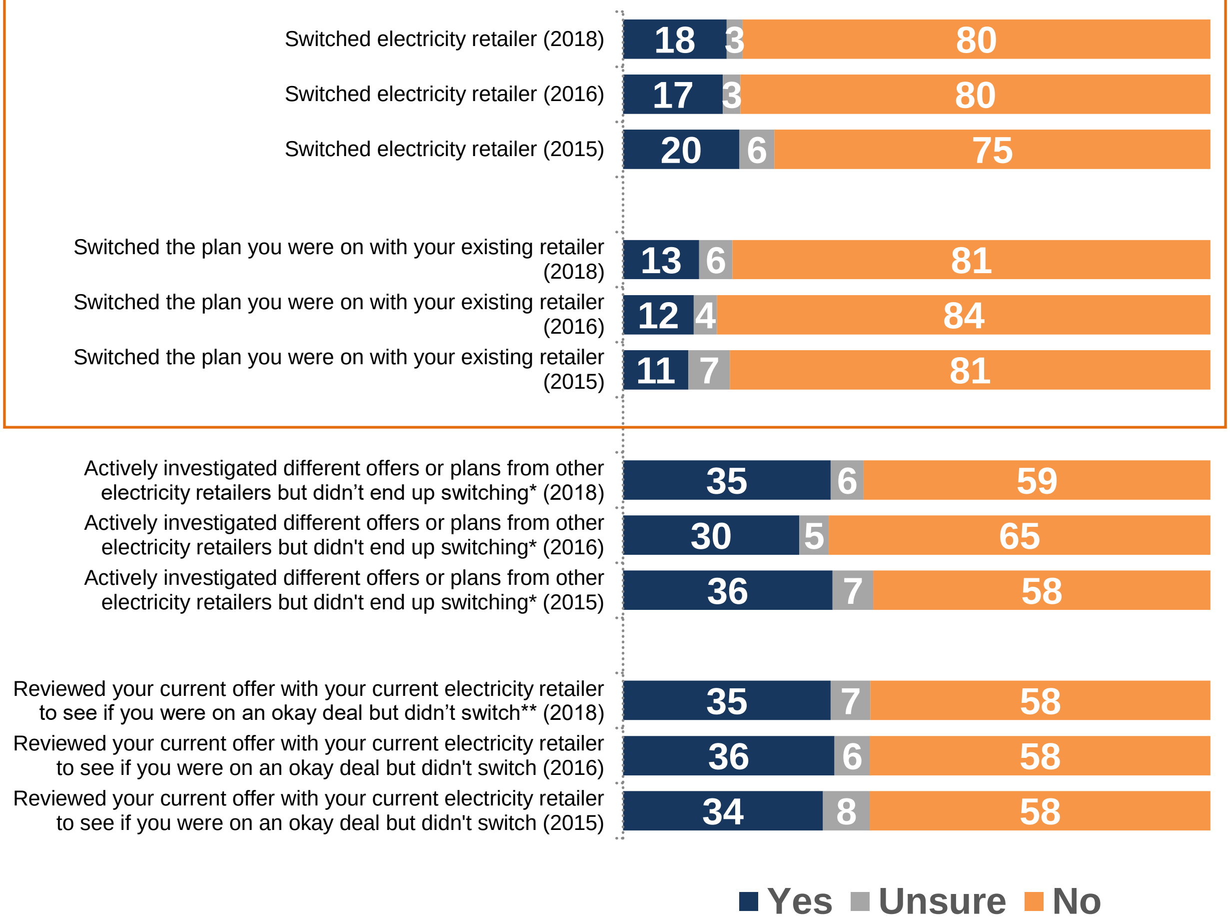
Switching

6.1 Actual behaviour – switching plan or retailer

■ Close to a fifth of people switched retailer in the last 12 months

Close to a fifth of respondents switched retailers (18%, up 1%). Around one in ten respondents (13%, up 1%) switched the plan they were on with their existing retailer. In total, a quarter of respondents (26%, up 2%) either switched the plan they were on or switched their retailer.

Actual behaviour – reviewing, shopping around, switching behaviour



Base 2015-2018: All respondents (n=1,200)
**Base 2018: Respondents who did not switch retailers (n=988)*
**Base 2016: Respondents who did not switch retailers (n=1,000)*
**Base 2015: Respondents who did not switch retailers (n=963)*
***Base: Respondents who did not switch plan with existing retailer (n=1,045)*

People were switching to other smaller electricity retailers

A higher proportion of other smaller companies' customers indicated they had switched retailer in the last year than any of the main retailers; 29% of the smaller retailers were switchers compared to 11-21% of the larger retailers.

People who had been at their current residence for less than two years were much more likely to have switched retailer (28%) particularly compared to people who have been at their current residence for 10 years (13%).

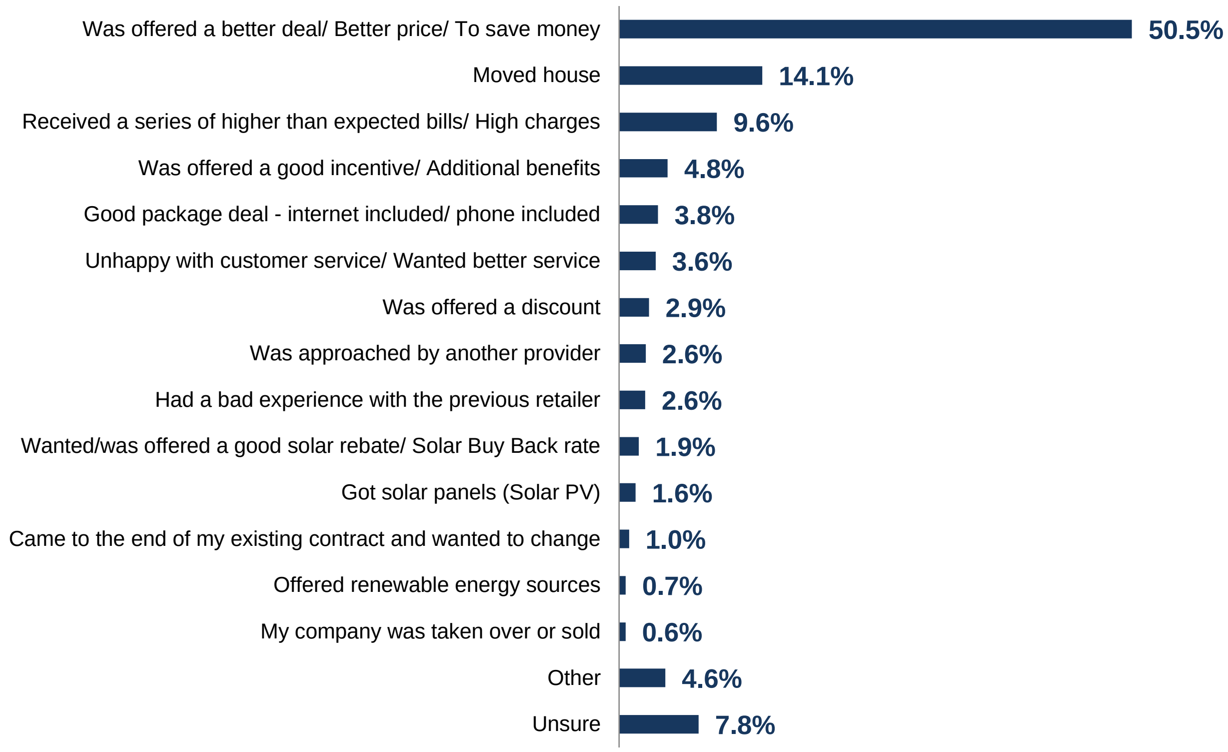
6.2 Reasons for switching

Better price main reason by far for switching

Of those who had changed their retailer or plan, 51% did so because they wanted to save money or were offered a better deal (down 5% from 2016). This year 14% mentioned they switched because they moved to a new house (same percentage as last year). Nine percent indicated they switched due to receiving a series of higher than expected bills. Followed by 5% that were offered an incentive or additional benefits.

Other reasons were mentioned at much lower levels and included: good package deal including internet and/or phone (4%), unhappy with customer service (4%) and was offered a discount (3%). The other reasons were all cited by less than 3% of the subsample.

Reasons for changing electricity retailer or plan



Base: Respondents who switched electricity retailer and/or switched the current electricity plan (n=309)
Note: Multiple response question

6.3 Information sources used in decision to switch

■ Looking at best price and savings most useful information source

The main information sources used by switchers were looking at the price/ best price or savings (41%, up 12%), a price comparison website (39%, down 1%), a Google/general internet search (33%, no change), going to the retailer website (30%, up 2%), asking a friend or family member (22%, up 8%) and phoning the retailer (21%, up 3%).

The information sources considered most useful were a price comparison website (19%, down 2%) and looking at the price/ best price or savings (13%, up 2%).

Information used in decision making – Tracking

Switching	*The last time you changed your electricity retailer or plan, which of the following information sources did you use to help with your decision?**			*Thinking about the information sources you used when changing your electricity retailer or plan, which one was most useful in helping with your decision to switch?*		
	2015	*2016*	*2018*	*2015*	*2016*	*2018*
Base: n=	*319*	*282*	*309*	*319*	*282*	*309*
Looked at price/best price/saving	25.9	28.8	40.9	9.0	10.8	13.1
Price comparison website	35.3	39.9	38.5	17.6	20.8	18.9
Google/general internet search	25.9	32.5	33.0	6.3	8.6	10.0
Retailer website	24.7	27.1	29.5	5.5	7.7	8.1
A friend or family member	17.2	13.9	21.7	6.5	4.7	7.5
Phoned the retailer	28.6	18.8	21.4	17.9	8.3	12.3
Received a call from a sales person	15.5	19.9	14.0	9.1	12.9	9.5
Door-to-door sales person visiting the home	15.5	14.2	12.8	11.0	9.0	7.7
General advertising e.g. TV, Radio, Newspaper advertisement	10.5	8.5	11.0	2.6	2.5	2.3
Brochures/flyers and other direct mail	10.3	8.9	6.7	3.4	2.6	0.7
Media article/advertisement segment	3.7	3.1	4.1	0.5	0.4	-
Community support organisation	3.2	1.4	2.9	1.3	0.4	0.3
Outdoor advertising e.g. billboards, buses	2.8	1.4	2.9	-	0.3	-
Financial counsellor	2.2	0.3	1.6	0.8	0.3	0.3
Other	4.4	6.2	3.2	2.0	5.8	1.9
Unsure	2.0	1.7	2.5	1.6	1.7	2.5
Did not use any information sources	8.9	3.3	4.9	5.1	3.3	4.9

Base: Respondents who switched electricity retailer and/or switched the current electricity plan
*Note: Multiple response question

6.4 Switching factors: switchers

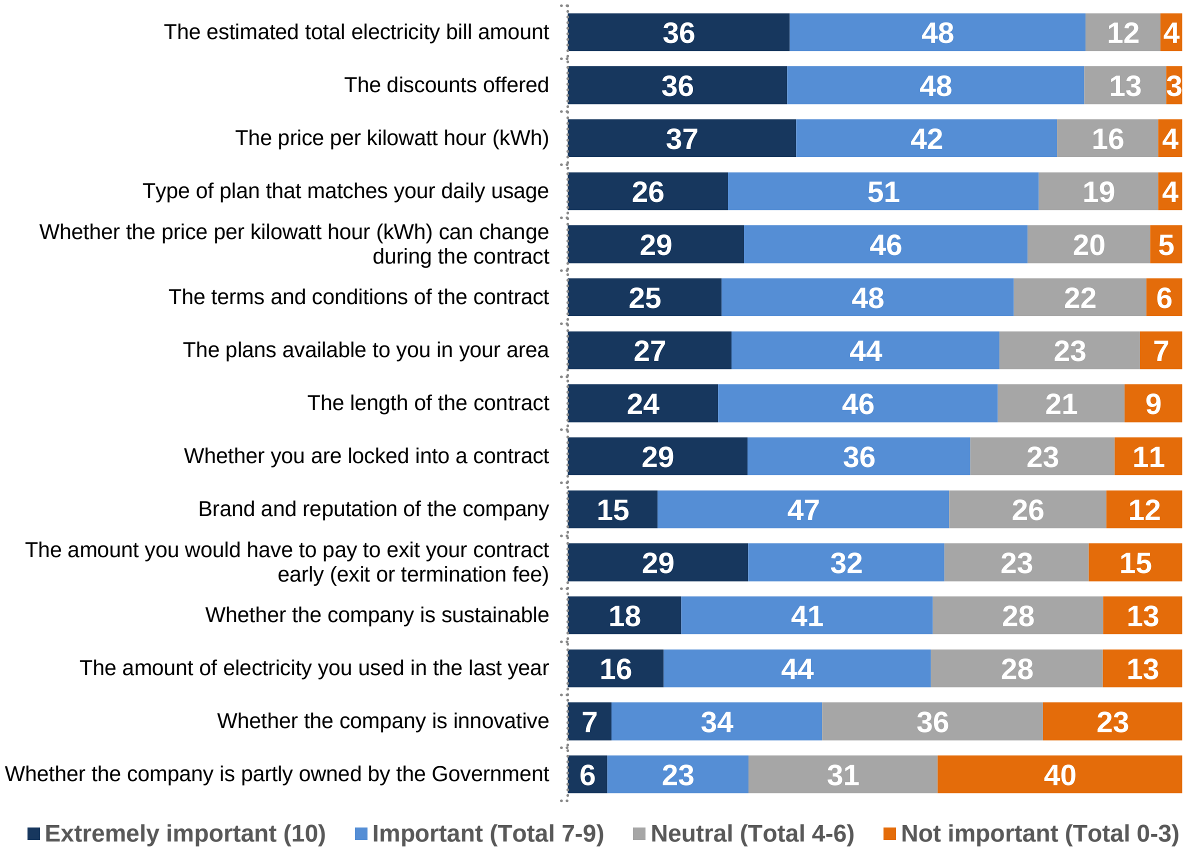
■ Switchers most important factors if switching were price related

For switchers, the most important factors used to weigh up when switching were also price related. However, switchers put less importance on almost all factors than reviewers. All but one factor had a rating of important (7-10) that was 2% to 15% (average 9%) lower than reviewers; however, the order of the factors in terms of importance was much the same.

Switchers gave an importance rating for discounts offered and estimated bill of 84%, while the price per kilowatt hour rated slightly lower on 80% (down 5%). Followed by the type of plan that matches daily usage and whether the price per kilowatt hour (kWh) can change during the contract (77% and 75% respectively).

Whether the company was innovative and partly government owned were again the lowest rated factors on 41% (down 1%) and 29% (up 1%) respectively.

Switching factors – by switchers



Base: Respondents who switched electricity retailer and/or switched the current electricity plan (n=309)

Switching factors – by switchers – Tracking

For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?	2015 TOTAL IMPORTANT (7-10) %	2016 TOTAL IMPORTANT (7-10) %	2018 TOTAL IMPORTANT (7-10) %
Base: n=	***319***	***282***	***309***
The discounts offered	**77**	**85**	**84**
The estimated total electricity bill amount	**75**	**80**	**84**
The price per kilowatt hour (kWh)	**78**	**85**	**80**
Type of plan that matches your daily usage	**74**	**78**	**77**
Whether the price per kilowatt hour (kWh) can change during the contract	**67**	**72**	**75**
The terms and conditions of the contract	**59**	**70**	**73**
The length of the contract	**61**	**68**	**70**
The plans available to you in your area	**70**	**72**	**70**
Whether you are locked into a contract	**63**	**69**	**66**
Brand and reputation of the company	**59**	**55**	**62**
The amount you would have to pay to exit your contract early (exit or termination fee)	**62**	**61**	**61**
The amount of electricity you used in the last year	**58**	**58**	**59**
Whether the company is sustainable	**49**	**57**	**59**
Whether the company is innovative	**36**	**42**	**41**
Whether the company is partly owned by the Government	**20**	**28**	**29**

Base: Respondents who switched electricity retailer and/or switched the current electricity plan

Barriers to taking action

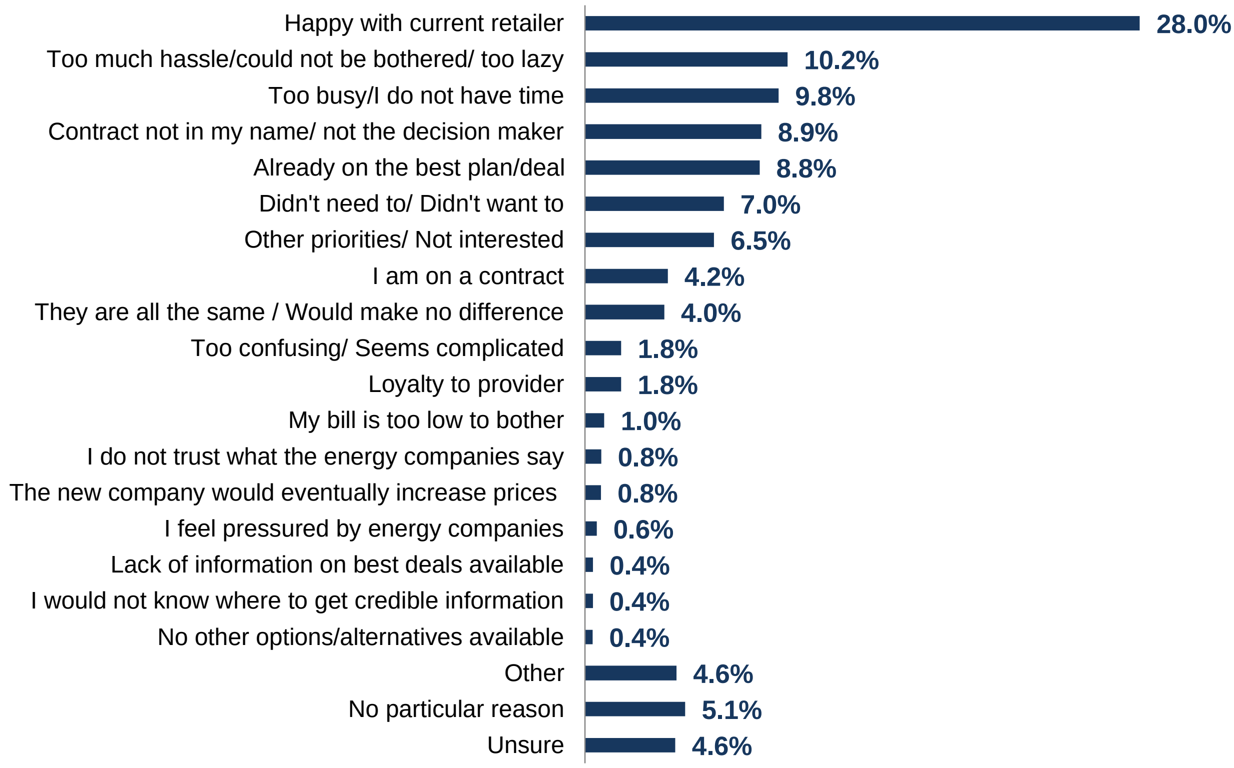
7.1 Reasons not reviewed or switched

■ Being happy with current retailer key barrier to reviewing or switching

For those that had not reviewed or switched retailer, the main reasons for not taking these actions were that they were happy with their retailer (28%, down 7%),it was too much hassle to bother doing anything about it (10%, down 1%), they were too busy (10%, up 1%), the contract was not in their name (9%, down 2%), and that they were already on the best plan (9%, no change).

Lesser mentioned reasons were not needing to change, lack of interest or other priorities, that they were locked into a contract, and a belief that all electricity retailers are the same (all 4-7%). Other reasons received less than 2% each.

Reasons not reviewed or switched



Base: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan (n=501)
Note: Multiple response question

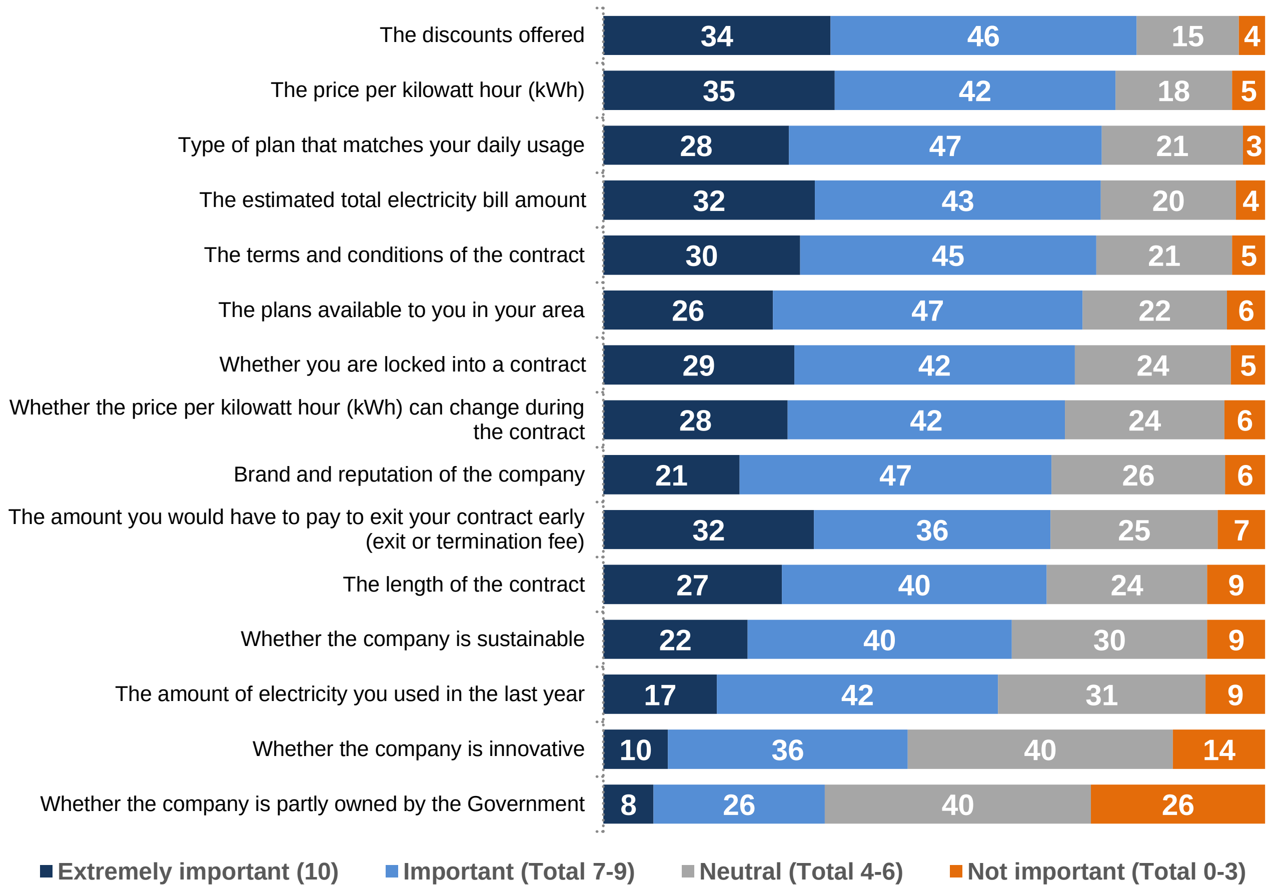
7.2 Switching factors: non-switchers

■ Price related factors strongest for non-switchers

Respondents who have not switched or reviewed the plans in the past 12 months gave ratings of importance (7-10, on a 0 to 10 scale where 10 is extremely important and 0 is not at all important) that were on average 9% lower than reviewers.

The rankings of the factors were again very similar to reviewers and switchers with price related factors as the most important, followed by factors around the contract and lastly factors about what the company was like. Discounts offered, price per kilowatt hour, type of plan and estimated bill were all rated between 75-81% important while the lowest ratings were for whether the company was innovative and partly government owned, 46% and 33% respectively.

Switching factors – by non-switchers



Base: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailers or switch current plan (n=501)

Switching factors – by non-switchers – Tracking

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	2015 TOTAL IMPORTANT (7-10) %	2016 TOTAL IMPORTANT (7-10) %	2018 TOTAL IMPORTANT (7-10) %
Base: n=	*432*	*546*	*501*
The discounts offered	78	77	81
The price per kilowatt hour (kWh)	79	77	77
The estimated total electricity bill amount	78	74	75
Type of plan that matches your daily usage	79	76	75
The terms and conditions of the contract	73	72	74
The plans available to you in your area	73	70	72
Whether you are locked into a contract	69	71	71
Whether the price per kilowatt hour (kWh) can change during the contract	75	72	70
Brand and reputation of the company	65	60	68
The amount you would have to pay to exit your contract early (exit or termination fee)	71	70	68
The length of the contract	67	66	67
Whether the company is sustainable	61	60	62
The amount of electricity you used in the last year	61	60	60
Whether the company is innovative	44	41	46
Whether the company is partly owned by the Government	31	29	33

Base: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan

7.3 Non-actives demographic breakdown

A profile was developed of people that had not undertaken any action, including switching, reviewing or investigating offers. The non-active demographics were relatively similar to the general public respondents overall. This indicates a limited opportunity to target specific demographic groups to achieve major shifts in behaviour but that a campaign with wide appeal is required.

- There were slight variations in age breakdown, with slightly higher proportions of younger respondents (18-29) who did not review or investigate different offers.
- Similarly, there was a slightly higher proportion of non-actives residing in Auckland and in other South Island areas.
- A higher proportion of those who did not review or investigate different offers indicated they did not have dependent children.
- There was a general trend across household income where there was a higher proportion of those who did not review or investigate different offers on lower incomes.
- There was a somewhat higher proportion of non-actives whose highest qualification was secondary school level.

Non-actives compared to all respondents

Demographic breakdown

		Non-actives %	All %
Base: n=		***501***	***1,200***
Gender	Male	49	49
	Female	51	51
Age group	18-29	26	23
	30-44	24	24
	45-59	26	26
	60+	25	27
Region	Auckland Region	37	35
	Wellington Region	11	11
	Canterbury Region	12	13
	Other North Island	27	31
	Other South Island	13	11
Reside in a rural area	Yes	12	14
	No / Unsure	88	86
Have dependent children	Yes	24	30
	No / Unsure	76	70
Home ownership	Renting	33	35
	I own my home without a mortgage	24	26
	I own my home with a mortgage	24	27
	I live at home with parents	11	8

Base: All respondents

Non-actives compared to all respondents (continued)

Demographic breakdown		Non-actives %	All %
Base: n=		***501***	***1,200***
Lived at your current residence	Less than two years	26	26
	2-5 years	28	28
	6-10 years	15	16
	More than 10 years	29	29
Household income	$20,000 or less	11	9
	$20,001-30,000	7	10
	$30,001-40,000	7	8
	$40,001-50,000	9	8
	$50,001-60,000	9	8
	$60,001-70,000	7	6
	$70,001-80,000	5	7
	$80,001-90,000	3	4
	$90,001-100,000	5	6
	More than $100,000	17	20
	Income was nil/or made a loss	1	1
	Prefer not to say	18	14
Employment status	Full time	34	36
	Part time	14	15
	Work casually	3	3
	Self-employed	5	7
	Unemployed	10	8
	Retired	19	19
	Student	9	7
	Homemaker	8	9
Highest education qualification	No qualification	8	6
	Secondary school qualification	34	30
	Polytech degree	5	6
	Other Polytech qualification	15	14
	University qualification	28	34
	Trade qualification	8	9

Base: All respondents

7.4 Switching factors: overall

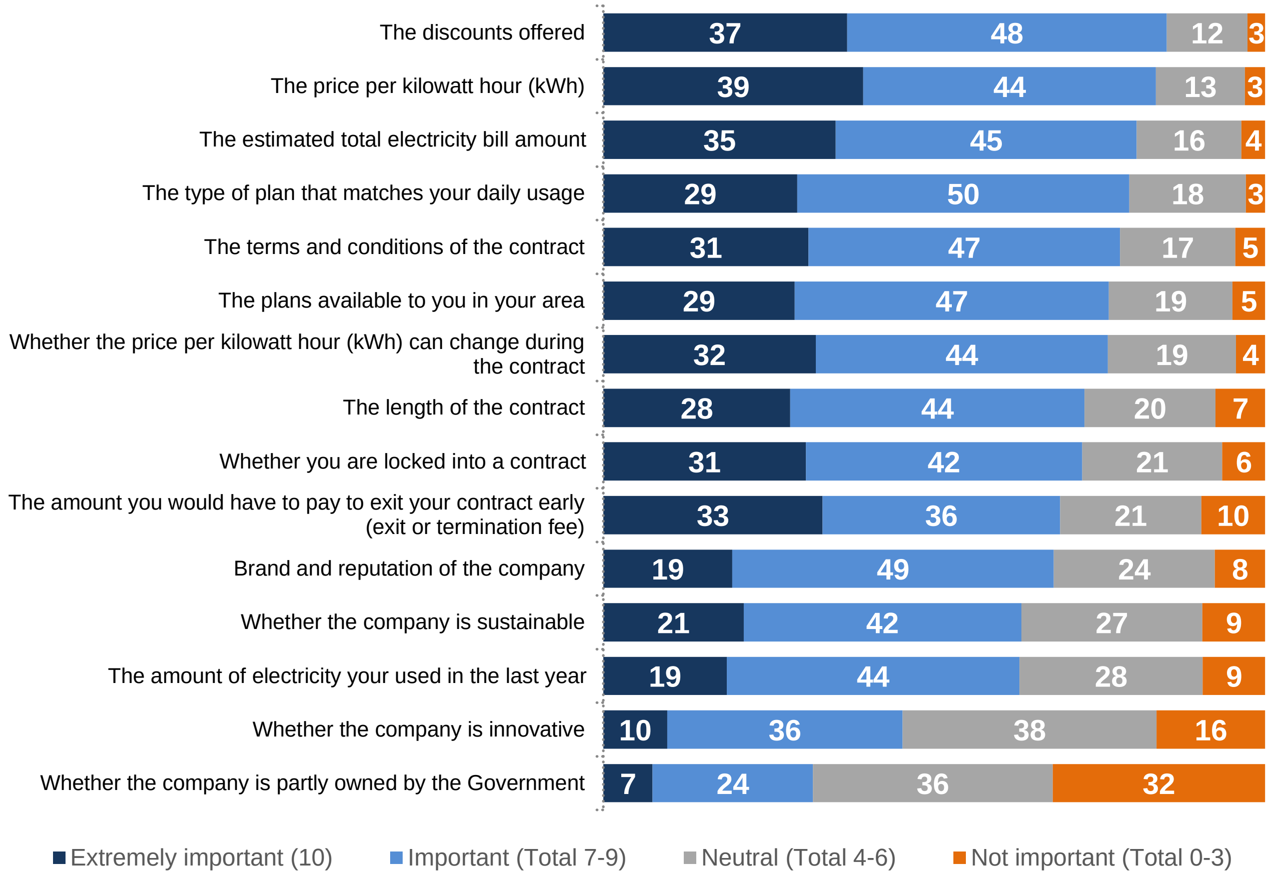
Key factors were around price and discounts

Across all respondents, price related factors were rated as the most important, followed by factors around the contract and lastly factors related to the brand and image of the company.

The discounts offered and the price per kilowatt hour were the top two factors again this year, 85% (up 1% from 2016) and 83% (same as previous years) respectively.

The lowest ratings continue to be whether the company is innovative (45%, up 2%) and whether it is partly government owned (32%, up 1%).

Switching factors – overall



Base: All respondents, excluding not applicable (n=1,177)

Switching factors – overall – Tracking

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?	2015 TOTAL IMPORTANT (7-10) %	2016 TOTAL IMPORTANT (7-10) %	2018 TOTAL IMPORTANT (7-10) %
Base: n=	***1,139***	***1,173***	***1,177***
The discounts offered	**83**	**84**	**85**
The price per kilowatt hour (kWh)	**83**	**83**	**83**
The estimated total electricity bill amount	**81**	**81**	**81**
Type of plan that matches your daily usage	**80**	**81**	**80**
The terms and conditions of the contract	**74**	**76**	**78**
The plans available to you in your area	**75**	**74**	**76**
Whether the price per kilowatt hour (kWh) can change during the contract	**75**	**76**	**76**
The length of the contract	**69**	**72**	**73**
Whether you are locked into a contract	**71**	**75**	**72**
The amount you would have to pay to exit your contract early (exit or termination fee)	**70**	**70**	**69**
Brand and reputation of the company	**63**	**61**	**68**
Whether the company is sustainable	**61**	**61**	**63**
The amount of electricity you used in the last year	**64**	**63**	**63**
Whether the company is innovative	**41**	**43**	**45**
Whether the company is partly owned by the Government	**27**	**31**	**32**

Base: *All respondents, excluding not applicable*

Level of importance strongly associated with confidence, care and age

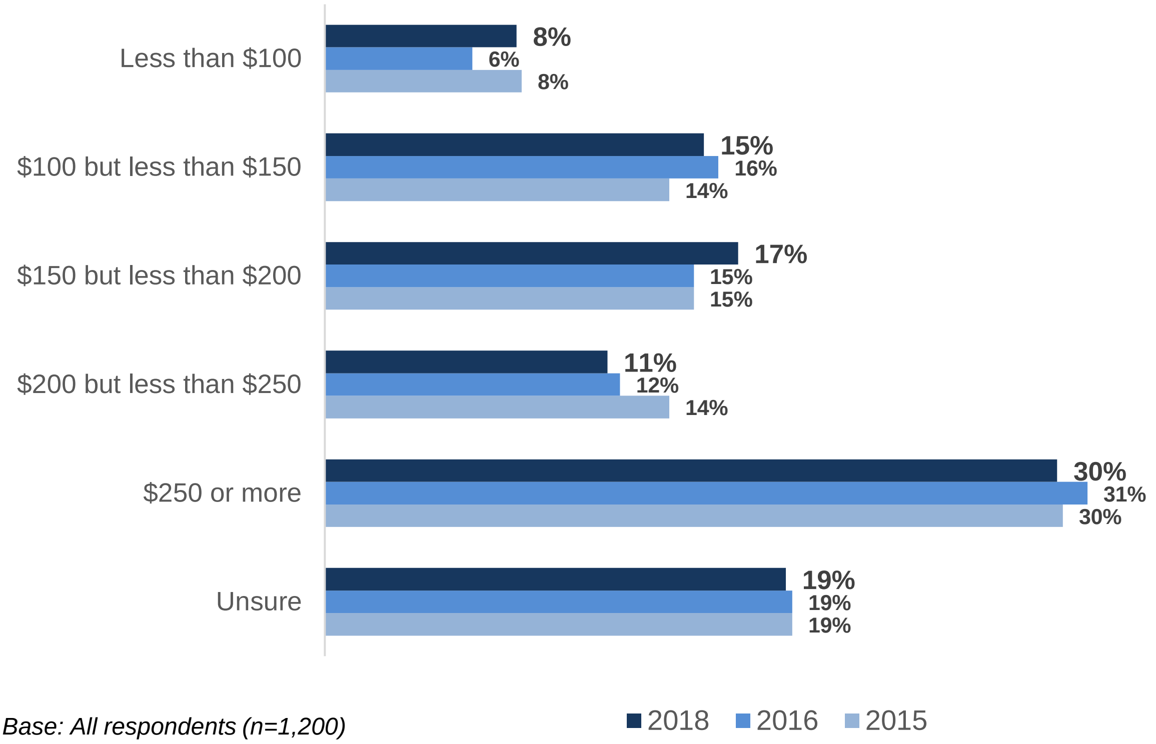
The same trends emerged this year when looking at the level of importance by confidence, care and age. Respondents who indicated they care about their provider gave higher ratings than their counterparts for every factor. Also, respondents with confidence in having adequate information and being able to select the best deal were more likely to have higher ratings of importance than the overall sample. There was a tendency for people under the age of 30 years to give lower levels of importance than older respondents.

7.5 Saving needed to consider switching

Almost a third of respondents would need to save over $250 to switch

Recent results were similar to previous years, with a minority (8%) of respondents that said the minimum amount of money they would need to save annually on their electricity bill in order to seriously consider changing their company or plan was $100 or less. Around half (51%) said they would consider switching if the savings were $250 or less and 30% would if savings were $250 or more, while 19% were unsure.

Savings needed to consider switching electricity company or plan



Base: All respondents (n=1,200)

People who had switched in the last year had lower expectations with 51% considering switching for less than $200 compared with 36% of non-switchers. Age was also a factor with 51% of respondents under 30 years, 44% of respondents 30-44 years, 34% of 45-59 years and 34% of over 60 years considering switching for $200 or less.

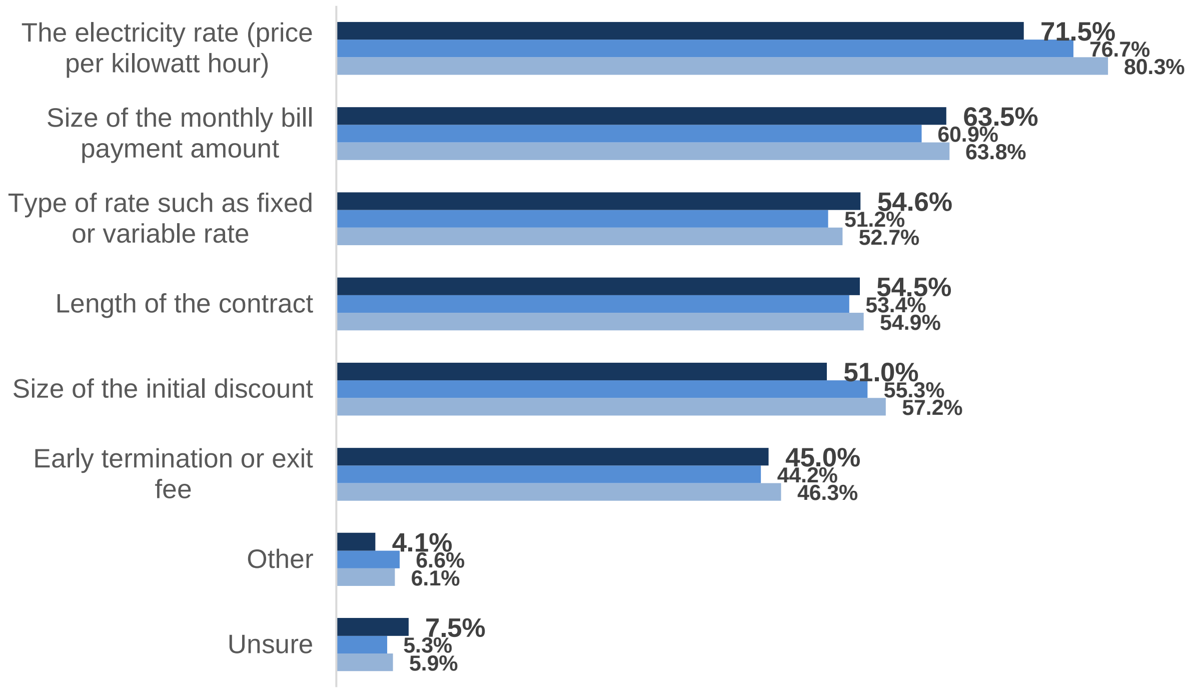
Information usage and needs

8.1 Information used when comparing retailers

■ Electricity rates main information people would use when comparing options

A majority (72%, down 5% from 2016) of respondents said they would look at the electricity rate when comparing retailer options or plans and 64% (up 3%) said they would look at the size of the monthly bill payment amount. There were between 51% and 55% who would look at the type of rate, length of the contract and the size of the discount, while a smaller proportion would look at early termination fees (45%, up 1%).

Information used for comparing electricity retailers



Base: All respondents (n=1,200)
Note: Multiple response question

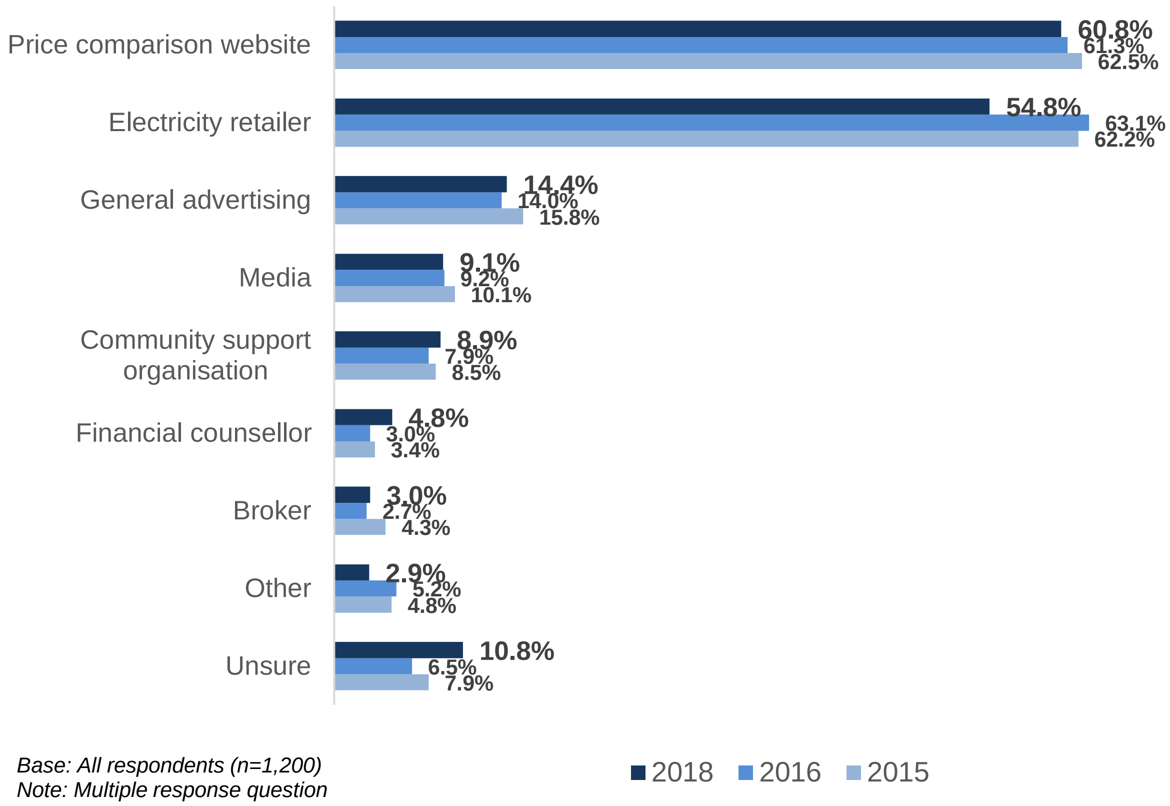
Non-decision makers and those who did not think it was worthwhile shopping around for electricity providers were much more likely to be unsure about what sort of information they would look for (15% and 12% respectively).

8.2 Preferred source of information

Price comparison websites and electricity retailers and the preferred source of information

Accessing information from a price comparison website and the electricity retailer remain the most preferred source of information, 61% and 55% respectively. General advertising, media and community support groups were next on 14%, 9% and 9% respectively. Financial counsellors and brokers featured at lower levels (5% and 3% respectively).

Preferred source of information



Base: All respondents (n=1,200)
Note: Multiple response question

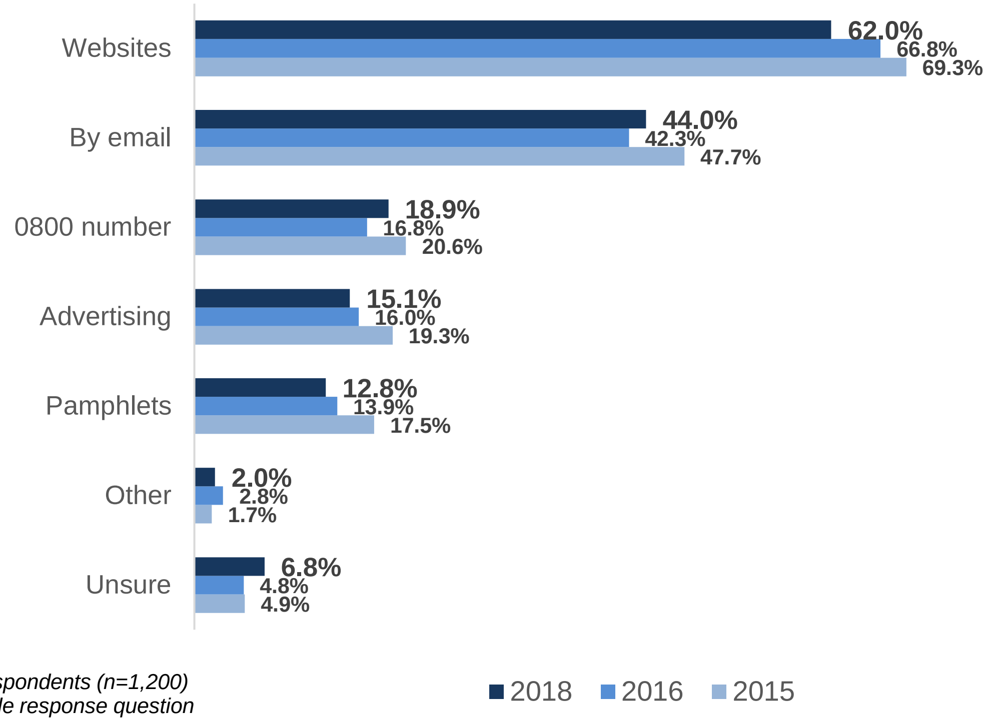
Media (15%) featured higher for people under the age of 30 years compared to their older cohorts (all on 9%). Price comparison websites featured higher among those who think it is worthwhile shopping around and reviewing their electricity retailer, those who find switching easy and decision makers (65-69%).

8.3 Best channel to access information

Internet best channel for getting information

Similar to the last survey, a majority (62%, down 5% from 2016) of respondents said websites would be the best way to access this information, while 44% (up 2%) preferred email. 0800 number, advertising and pamphlets featured at lower levels, 13-19%.

Best way to access information



Base: All respondents (n=1,200)
Note: Multiple response question

People over the age of 60 years were more likely to nominate email (52%) and 0800 numbers (27%). Those over 60 were less likely to suggest websites (56%), this appears to suggest that respondents over 60 years old are more passive seekers of information.

8.4 Missing information

■ Majority do not think there is any missing information

A vast majority (88%) of people were either unsure or did not think there were any sources of information that they had expected to find but that it was unavailable. There were no significant types of information that were seen as missing.

The most mentioned type of missing information was cited by 5.2% of respondents and related to enhancing information accessed through websites, namely, websites lacking specific details on price comparison or retailer websites, specific details on conditions and fees, and the costs of switching.

Missing sources of information – information expected to find but was unavailable

Are there any sources of information you expected to find but you were disappointed to find was unavailable?

	All %	*n=*
No/Unsure	87.7	*1052*
Specific details on price comparison or provider's website/ Specifics on conditions and fees/ Costs of switching	5.2	*63*
Phone call from electricity provider/ Door to door sales person/ Email from provider/ Post from provider	1.3	*16*
Information about provider (NZ owned, renewable energy)	1.1	*13*
Information is confusing/ Difficulty analysing information/ Information is unclear	0.8	*10*
Reviews	0.5	*6*
Comparison websites/ Prices on websites	0.5	*6*
Word of mouth/ Friends and family discussions or recommendations/ Community support or advice	0.5	*6*
Advertising/ Media/ Newspaper/ Pamphlets/ Post/ Radio/ Social media	0.4	*5*
Smart meters/ Ability to track usage	0.3	*4*
Face-to-face/ Direct contact	0.1	*1*
Locations providers operate	0.1	*1*
0800 number	0.1	*1*
Other	1.9	*23*

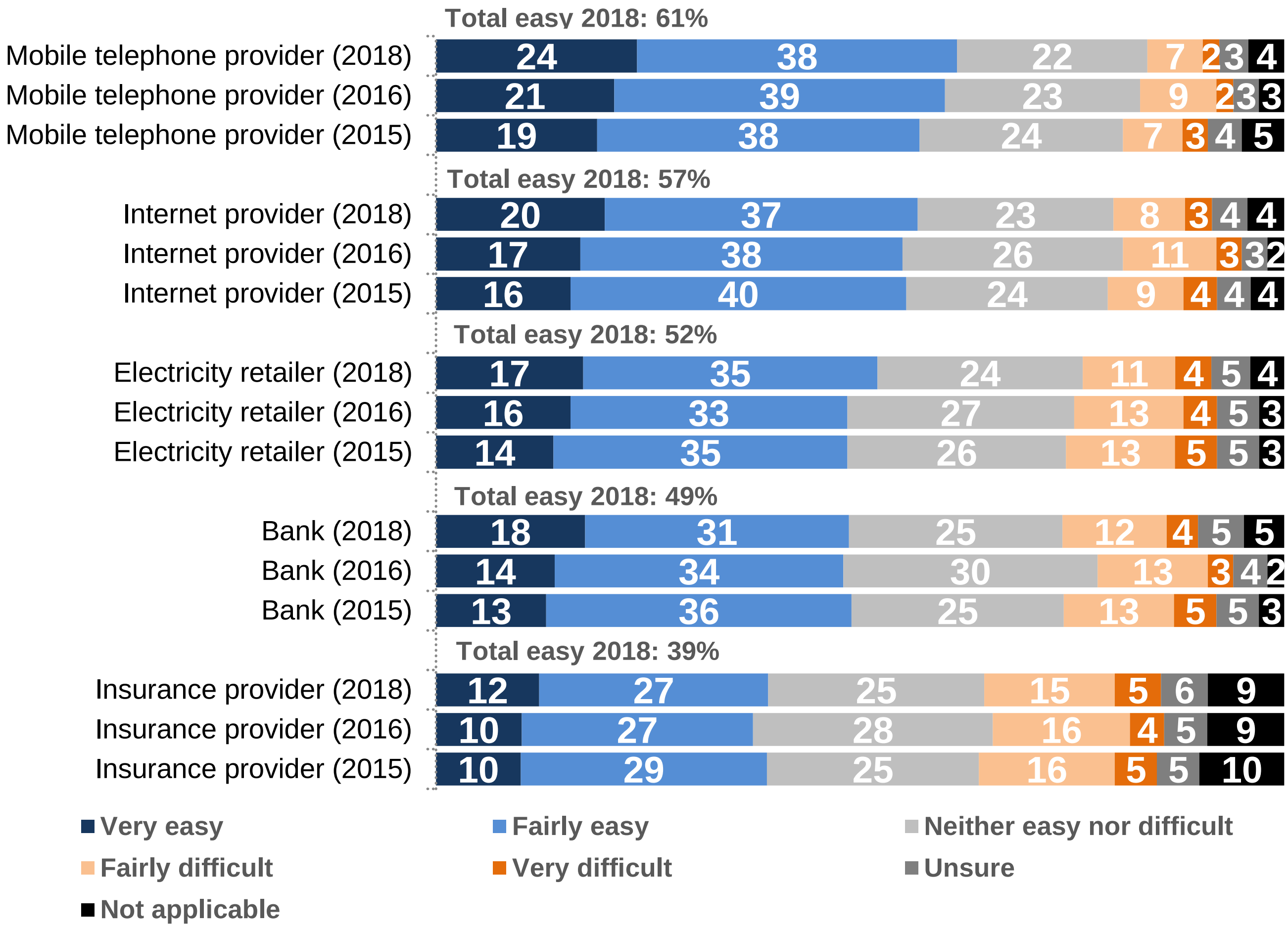
Base: All respondents (n=1,200)

8.5 Difficulty comparing offers

- **Electricity retailers lag behind mobile providers and internet providers on ease of comparison**

Results this year were similar to previous years. Three in five respondents (61%) claimed it was easy (very easy or fairly easy) to compare offers from mobile telephone providers. Fifty-seven percent of respondents thought comparing internet provider offers were easy. Around half of respondents indicated it was easy to compare offers for electricity retailers and banks (52% and 49% respectively). Insurance providers were considered the least easy to compare, only 39% of respondents rated them easy to compare.

Difficulty comparing offers when deciding to switch household services



Base: All respondents (n=1,200)

■ Switchers think comparing prices is easier

Those who care about their electricity retailer were more likely (56%) to think it was easy to compare offers than those who have indicated they do not care as much (45%). Respondents who had switched retailer or plans in the past year (62%) and those who had reviewed their plans but had not switched (56%) thought it was easier to compare offers than people who had not switched (43%).

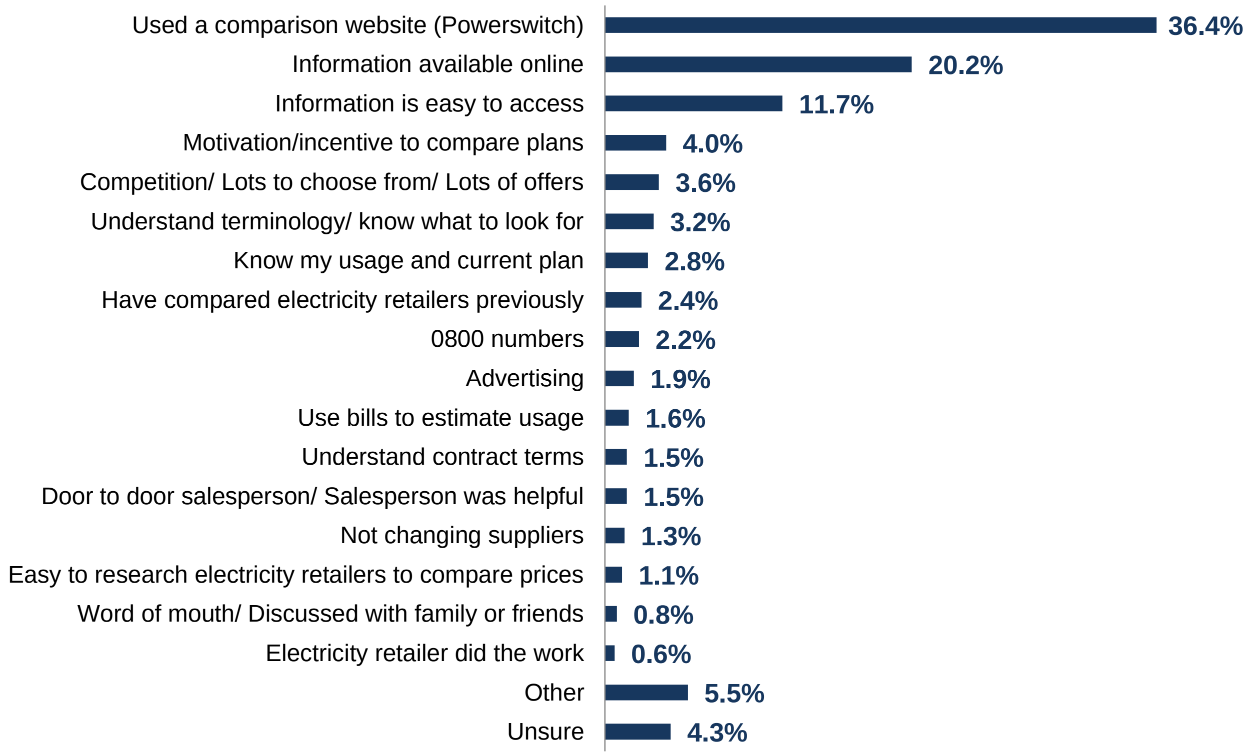
8.5.1 Reasons for being easy to compare electricity retailers

■ Having online services main reason for ease of comparison

Mentions of comparison websites (36%, up 7%) and availability of online information (20%, down 16%) were the most frequently cited reasons for why people thought it was easy to compare electricity retailers. Followed by easy access to information (12%).

Motivation to compare plans, competition provides a lot of choice and understanding terminology featured at lower levels (between 3-4%). All other reasons mentioned were less than 3%.

Reasons easy to compare electricity retailers



Base: Respondents who found it fairly easy or very easy to compare different offers when deciding whether or not to switch electricity retailer (n=625)
Note: Multiple response question

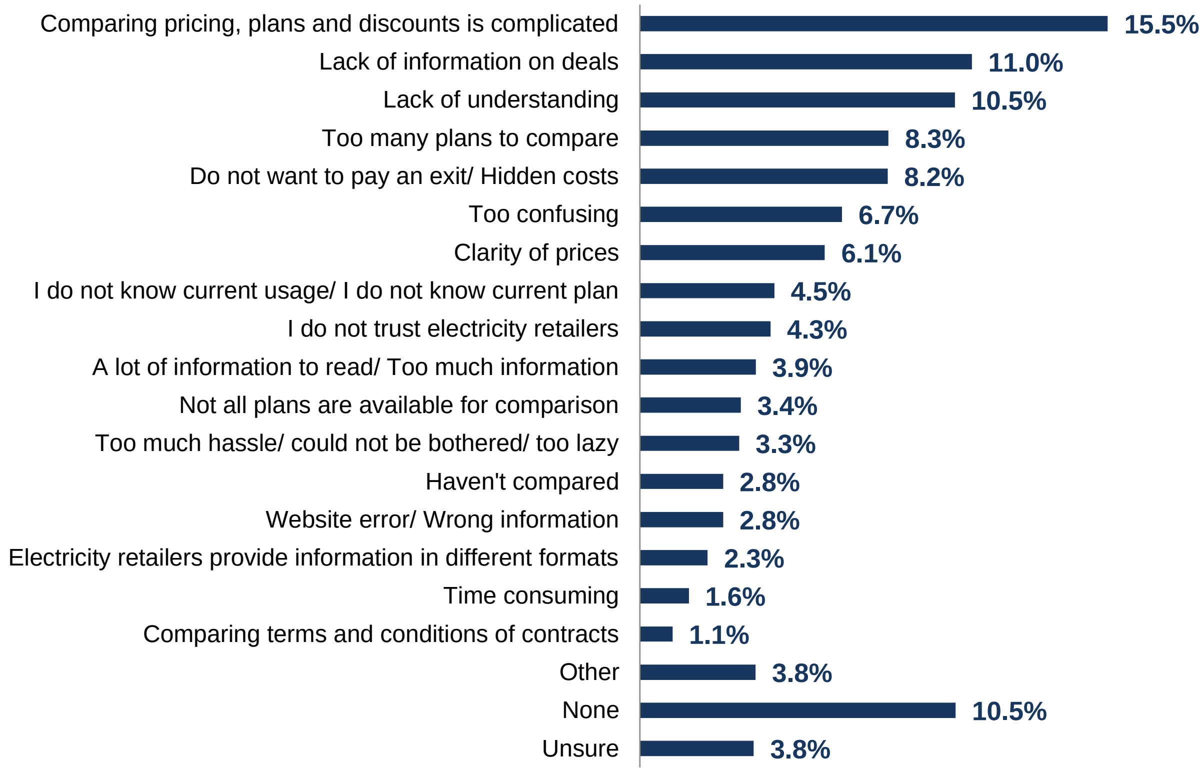
8.5.2 Reasons for being difficult to compare electricity retailers

■ Confusion on pricing and lack of information on deals lead to problems comparing retailers

Reasons for believing that comparing electricity offers was difficult were more varied than the reasons why it is easy. The complicated nature of comparing pricing/ plans/ discounts, lack of information on deals and a lack of understanding were the main reasons people found it difficult to compare retailers (11-16%).

Other reasons that were frequently mentioned were that there were too many plans to compare, not wanting to pay an exit fee, too confusing, and clarity of pricing (6-8%).

Reasons had problems comparing electricity retailers



Base: Respondents who found it fairly difficult or very difficult to compare different offers when deciding whether or not to switch electricity retailer (n=181)
Note: Multiple response question

Retail data options

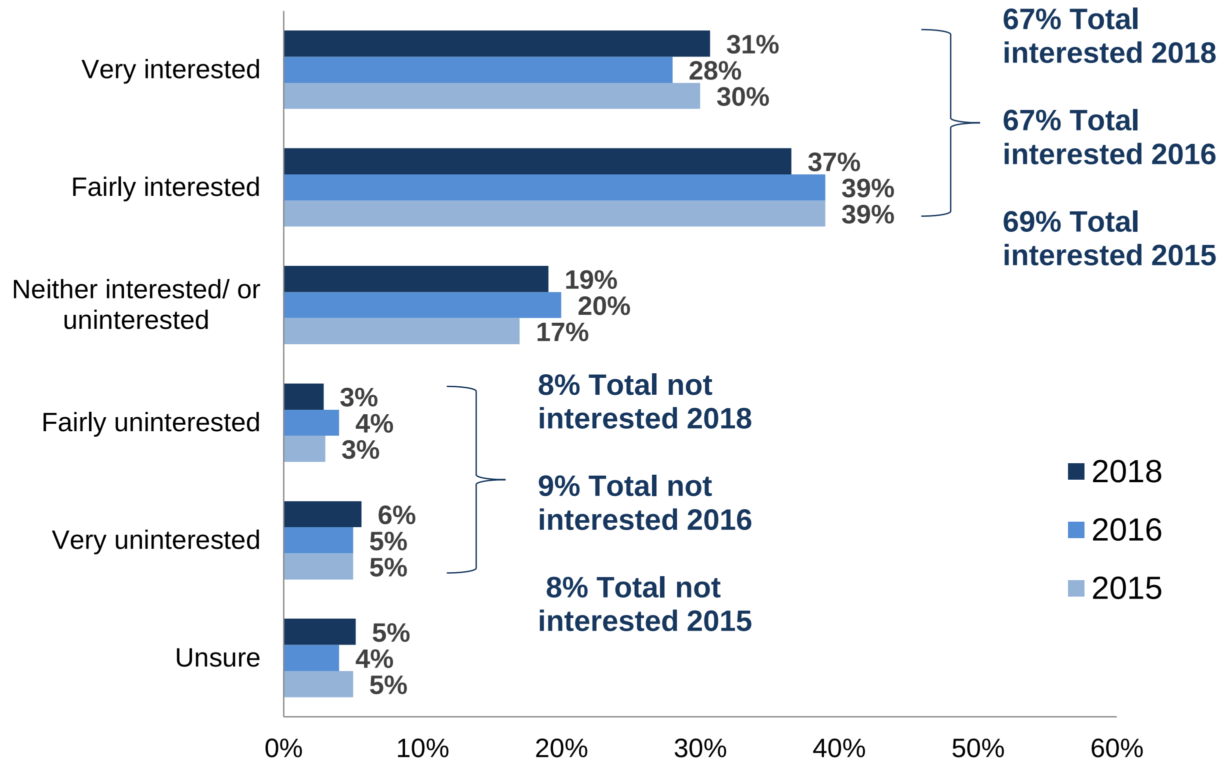
9.1 Interest in a comparison website

High interest in comparison website

Two thirds (67%, no change since 2016) of respondents expressed interest in a detailed electricity comparison website like WebJet, while one in five respondents (19%) indicated they were neither interested nor uninterested and 8% said they were not interested.

Those who indicated it was likely they would switch, those who think it is worthwhile to review and shop around, those who think it is easy to switch electricity providers, work full time, that care about which electricity retailer they choose, and decision makers were all more likely to express interest in a detailed comparison website (70-82%).

Interest in a comparison website



Base: All respondents (n=1,200)

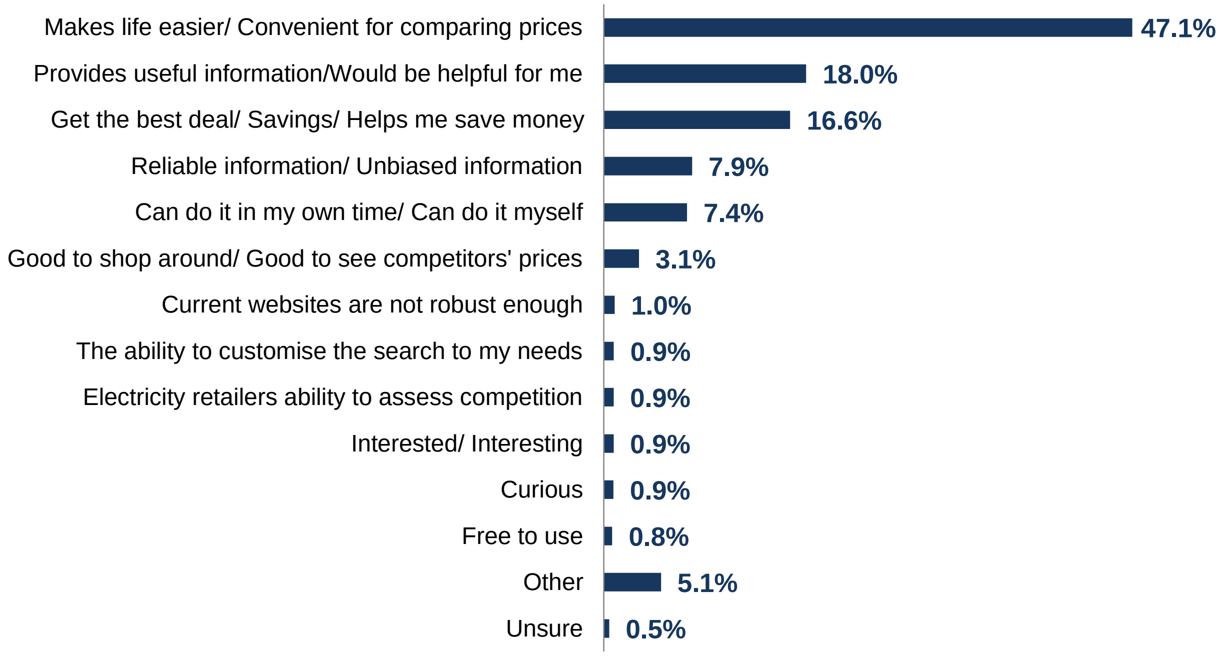
9.1.1 Reasons for interest in comparison website

Makes it easier

Forty-seven percent of people interested in a price comparison said it was because it would be easy or convenient for comparing prices. Followed by 18% who mentioned that the price comparison website would provide useful information in the one place and 17% mentioned that the website would help save money by getting the best deal.

Eight percent cited that the website would provide reliable and unbiased information and seven percent mentioned that they can make their own assessment in their own time. Three percent cited that it was good to shop around and know what other retailers are offering. Other reasons were mentioned by 1% or less of interested respondents.

Reasons interested in a comparison website



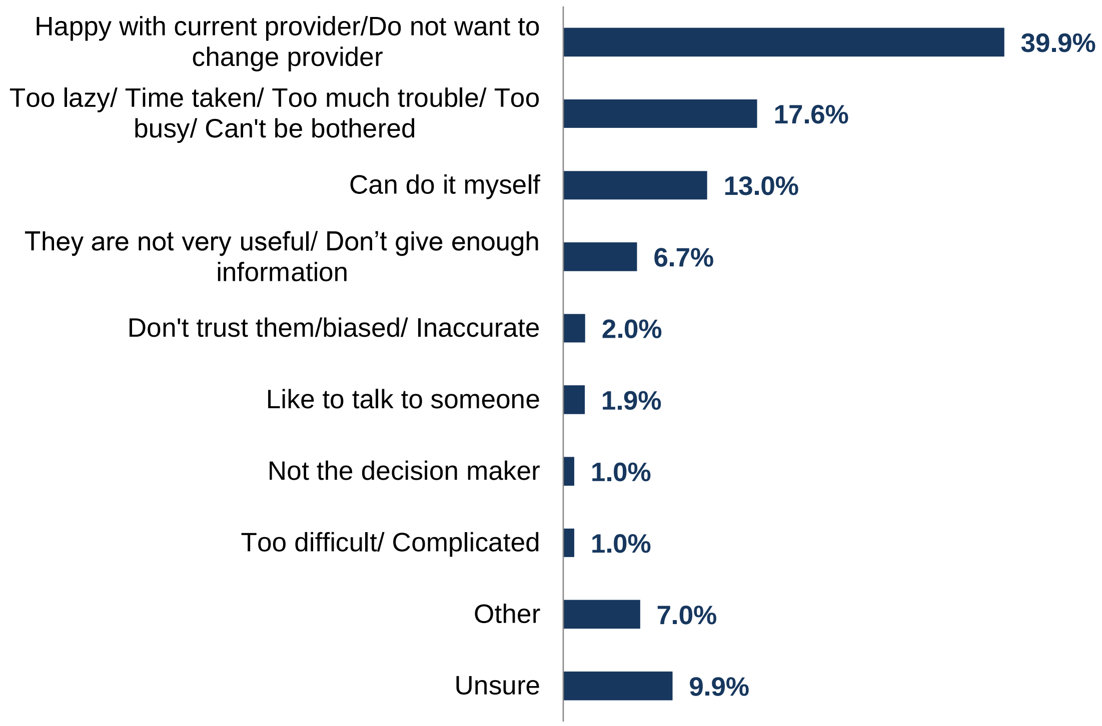
Base: Respondents who were fairly interested or very interested in a comparison website (n=806)
Note: Multiple response question

9.1.2 Reasons not interested in comparison website

■ Do not want to change provider

In line with the previous survey, the main reasons people were not interested in a comparison website were that they were happy with their current provider and did not want to change (40%, up 4%) and that it felt like it was too much trouble to use such a website (18%, up 4%). That they can do it themselves (13%) and that they do not give enough information (7%) were other frequently cited reasons.

Reasons not interested in a comparison website



Base: Respondents who were fairly uninterested or very uninterested in a comparison website (n=102)
Note: Multiple response question

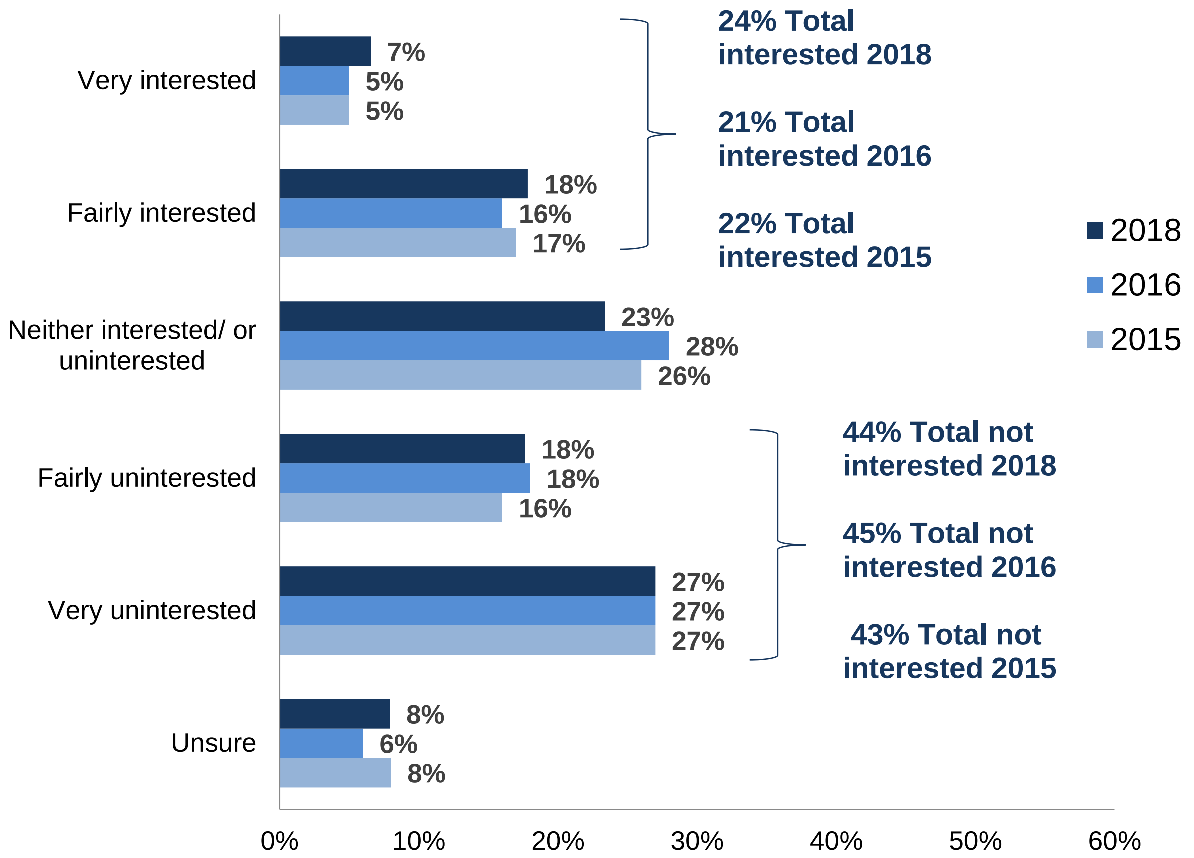
9.2 Interest in a third-party or broker service

Low interest in third-party service

Similar to previous findings, there was lower interest in a third-party service with around a quarter of respondents (24%, up 3%) declaring they were very interested or fairly interested in a third-party or broker who would do comparison analysis for them. Over one in five respondents (23%) were neither interested nor uninterested and 44% said they were not interested.

Those who said they were likely to switch providers (37%), who think it is worthwhile reviewing (34%), who have switched (32%), work full time (30%), and those who think it is worthwhile shopping around (30%) were more likely to be interested in a third-party service.

Interest in a third-party or broker service



Base: All respondents (n=1,200)

9.2.1 Reasons for interest in third-party service

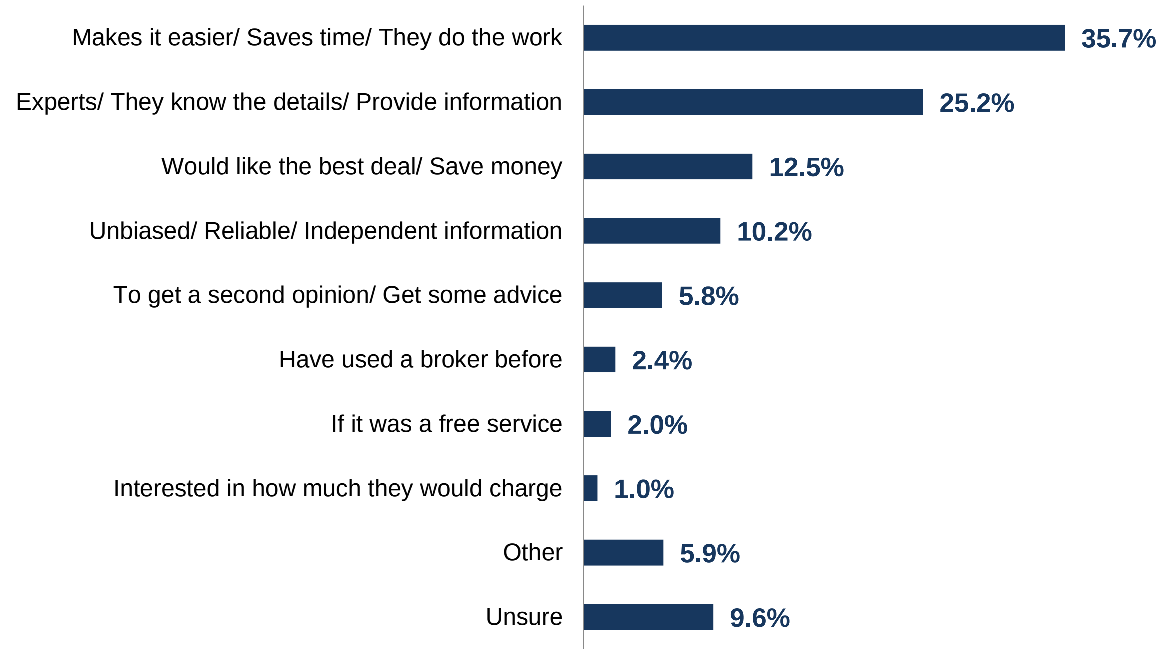
Access to experts and third-party services makes it easier

The most commonly mentioned reasons for interest in a third-party service were that it would save time and make the process easier (36%, up 4%) and the knowledge and information these experts offer (25%, down 8%).

Other common reasons included that they would help to get the best deal to save money (13%) and would provide reliable independent information (10%).

Six percent cited they were interested in a third-party broker service to get advice and a second opinion. Other reasons were mentioned by less than 3% of interested respondents.

Reasons interested in a third-party broker service



Base: Respondents who were fairly interested or very interested in a third party or broker service (n=293)
Note: Multiple response question

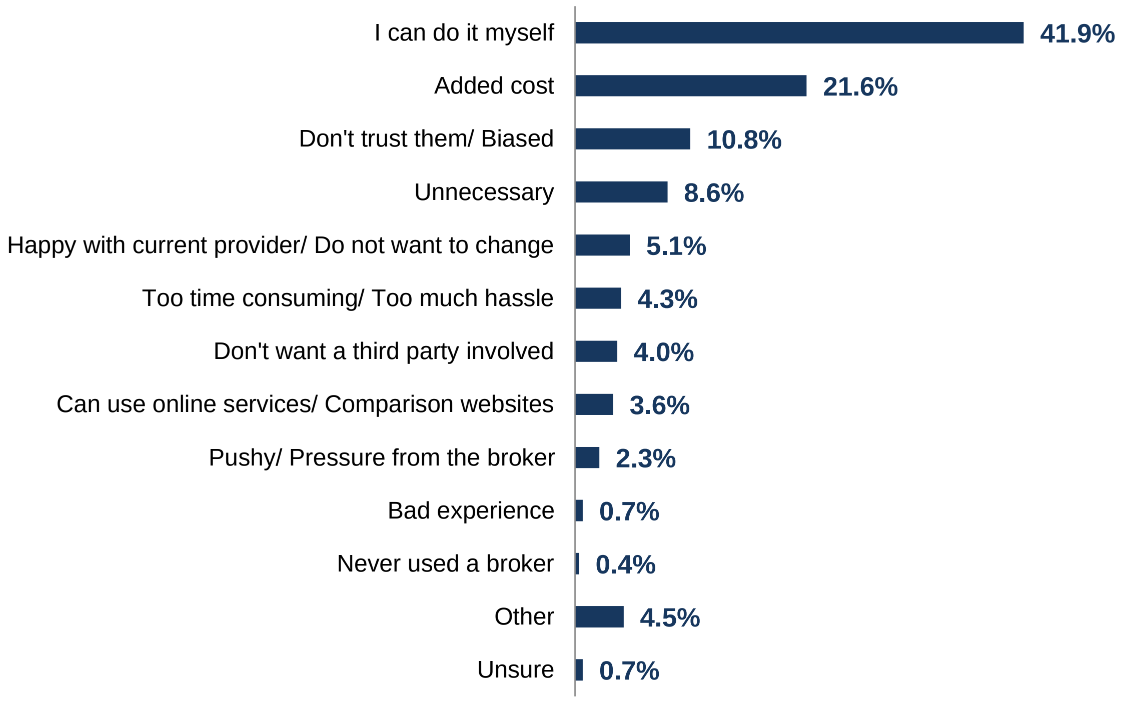
9.2.2 Reasons not interested in third-party service

Can do it myself

The most commonly mentioned reasons for a lack of interest remained the same this year. The main reason people were not interested in a third-party service was the belief that they could do it themselves (42%, no change), followed by the concern over the extra cost for using a third-party (22%, down 1%), and not trusting a third-party to be unbiased (11%, down 3%).

Lesser reasons were that it was unnecessary, that they were happy with their current provider, that it would be too much hassle, that they do not want a third-party involved, they can use online services and they would feel pressured from the broker (2-9%).

Reasons not interested in a third-party or broker service



Base: Respondents who were fairly uninterested or very uninterested in a third party or broker service (n=532)
Note: Multiple response question

Segmentation analysis

10.1 Summary

In line with 2015 and 2016, five segments were identified based on analysis of respondents' satisfaction and care for their household suppliers as well as a range of behaviour traits.

Overtime, the size of the segments has remained reasonably steady, the largest change was seen for the Cynical Shoppers which increased from 13% to 16%. The only other increase was in the size of the Unconvinced Shoppers – from 17% to 18% while minor decreases were seen for Complacent Shoppers (from 24% to 22%) and Informed Shoppers (from 23% to 22%). The size of Latent Shoppers segment remained at 23%.

The Cynical Shoppers segment (16% of population) exhibited the highest level of satisficing as they cared a lot about who their suppliers were but were also dissatisfied with them. They were the only segment that had very low satisfaction ratings.

The Latent Shoppers segment (23%) showed a below average level of care and average satisfaction ratings. However, they also presented an opportunity as they had lower confidence that they were on the best deal and slightly lower confidence that they had the information they needed to make a good decision.

The Unconvinced Shoppers segment (18%) exhibited below average care and a reasonable level of satisfaction with their electricity retailer. They had below average confidence that they would choose the right deal and average confidence that they had the information they needed. This could be linked to the fact that their electricity bill tended to be lower than average.

Complacent Shoppers (22%) had a high level of care about household suppliers and were also highly satisfied with the service they receive. They were highly confident in their choices which appeared to make them less likely to switch.

Informed Shoppers (22%) had higher than average care and satisfaction ratings. They were highly confident that they were on the best deal and had the information they needed to make a good decision. They were more likely to find it easy to switch and had switched or actively investigated different offers or plans which may be reinforcing the perception that they are on the best deal.

Continuum of care segments – personally care about choice of retailer/ satisfaction with retailer

Cynical shoppers	Latent shoppers	Unconvinced shoppers	Complacent shoppers	Informed shoppers
16% (up 3%)	23% (nc)	18% (up 1%)	22% (down 2%)	22% (down 1%)
– High care/ lowest satisfaction – Less confidence on best deal/ have information needed – More likely to value reviewing/ actively shopping around – More likely to state that they're likely to switch – Less likely to believe it is easy to compare different offers	– Low care and reasonably satisfied – Less likely to be decision maker – Less confident in choosing the right deal – Average likelihood of switching however less likely to actively investigate offers/ plans – Less likely to be aware of their monthly spend on electricity	– Reasonably satisfied and lower than average care – Lower level of confidence in choosing the right deal for household – Less likely to think it is worthwhile reviewing and actively shopping around so also less likely to state they would switch/ have switched – Less likely to be interested in a price comparison website – Appear to have lower electricity bills	– High satisfaction and high care – Less likely to think it is worthwhile reviewing electricity retailer and also less likely to say that it is likely they'll switch – Confident that they have all information they need to compare the different offers and confident that they'll choose the deal that is right for their household – Believe that it is easy to compare different offers	– High satisfaction and high care – More likely to be the decision maker and believe of switching and comparing offers is easy – High level of confidence in being able to choose the right deal and that they have all the information required to compare different offers – More likely to have switched or reviewed in the past 12 months – Are interested in visiting a price comparison website
– Middle-aged (45-59), have dependents, surf the net and regular social media user, less likely to keep up with business news	– Younger (18-29), Aucklanders, 3 or more adults in household, no children, working full time – Like to keep up with latest technology, go overseas at least once every couple of years, digitally connected (surf & social media)	– Older (60 plus), own home freehold, lived at current residence for more than 10 years – Highest percentage of retired – Lower percentages of keep up with technology, surf the net and social media	– Female, 30-44 years old, have dependents, close to half renting and close to one third have a mortgage – Less likely to be in full-time work and more likely to have no qualification or a secondary school qualification. – Surf the net, regularly use social media and read local community paper	– More likely to be Male, 60 plus with no dependents – Are mortgage free and have lived in their current residence for more than 10 years – Read newspaper, business news and community papers and go overseas every couple of years – Like to keep up with technology and often surf the net

Strong satisficing
(High level of care/ Low satisfaction)

Weak satisficing
(High level of care/ High satisfaction)

10.2 Segment characteristics

10.2.1 Cynical shoppers (16%)

The Cynical Shoppers segment (16% of population) exhibited the highest level of satisficing as they cared about who their suppliers were but were also dissatisfied with them. They were the only segment that had very low satisfaction ratings.

Profile

Cynical Shoppers are more likely to be in the 45 to 59-year-old age bracket, surf the web and more likely to think it is worthwhile reviewing their electricity retailer. They also tend to care about each of their household services but give a very low satisfaction rating for each of them.

Likely to switch suppliers but not confident in choosing the best deals

This segment was more likely to have a low satisfaction rating toward their electricity retailer, they had the lowest satisfaction rating of 23% compared to 73% overall.

Of all the other services asked about, this segment's level of satisfaction was highest for their mobile telephone provider – yet less than half (46%) were satisfied. Satisfaction with their main bank was also low at 41%, followed by their Internet provider at 28% and Insurance provider at 26%.

In terms of switching providers, this segment scored the highest levels of likelihood of switching for all services. Forty-three percent indicated that they are likely to switch their Internet provider followed by 38% for their Electricity retailer (this compares to 23% of All). They were least likely to switch their bank (22%) though this was still higher than the all figure of 14%.

They are more inclined to think it is worthwhile reviewing providers (55% compared to 41% All). Although this segment is much less confident about choosing (50% vs. 69% All) and comparing (35% vs. 60% All) offers and 24% said it was difficult to compare the different offers from electricity retailers (15% All).

Key characteristics

	Column %	Cynical shoppers	All respondents
Gender	Male	42%	49%
	Female	58%	51%
Age group	18-29	22%	23%
	30-44	30%	24%
	45-59	33%	26%
	60 plus	15%	27%
Region	Auckland Region	37%	35%
	Wellington Region	14%	11%
	Canterbury Region	13%	13%
	Other North Island	29%	31%
	Other South Island	8%	11%
Reside in a rural area or district with population less than 2,000	Yes	16%	14%
	No/ Unsure	84%	86%
Number of people 18 years of age or older living in household	1	22%	22%
	2	43%	46%
	3 or more	34%	30%
Have dependent children aged under 18 years	Yes	47%	30%
	No/ Unsure	53%	70%
Home ownership	Renting	33%	35%
	I own my home freehold	20%	26%
	I own my home with a mortgage	33%	27%
	I live at home with my parents	9%	8%
Lived at your current residence	1 Less than two years	26%	26%
	2-5 years	34%	28%
	6-10 years	16%	16%
	More than 10 years	23%	29%
Household income	$20,000 or less	6%	9%
	$20,001-30,000	9%	10%
	$30,001-40,000	5%	8%
	$40,001-50,000	9%	8%
	$50,001-60,000	10%	8%
	$60,001-70,000	5%	6%
	$70,001-80,000	8%	7%
	$80,001-90,000	3%	4%
	$90,001-100,000	10%	6%
	More than $100,000	18%	20%
	Income was nil/or made a loss	2%	1%
	Prefer not to say	15%	14%
Full time	Yes	38%	36%
	No/ Unsure	62%	64%
Part time	Yes	12%	15%
	No/ Unsure	88%	85%
Work casually	Yes	4%	3%
	No/ Unsure	96%	97%
Self-employed	Yes	9%	7%
	No/ Unsure	91%	93%
Unemployed	Yes	8%	8%
	No/ Unsure	92%	92%
Retired	Yes	10%	19%
	No/ Unsure	90%	81%
Student	Yes	6%	7%
	No/ Unsure	94%	93%
Homemaker	Yes	12%	9%
	No/ Unsure	88%	91%
Highest educational qualification	No qualification	5%	6%
	Secondary school qualification	24%	30%
	Polytech degree	7%	6%
	Other Polytech qualification	16%	14%
	University qualification	36%	34%
	Trade qualification	9%	9%
Read the newspaper or view it online nearly every day	Yes	57%	56%
	No/ Unsure	43%	44%
Like to keep up with the latest technology	Yes	43%	51%
	No/ Unsure	57%	49%
Go overseas at least once every couple of years	Yes	40%	50%
	No/ Unsure	60%	50%
Often surf the internet	Yes	95%	84%
	No/ Unsure	5%	16%
Involved in a lot of voluntary community activity	Yes	29%	25%
	No/ Unsure	71%	75%
Read the business news just about every day	Yes	18%	25%
	No/ Unsure	82%	75%
Regularly use social media such as Facebook, Twitter or Instagram	Yes	81%	70%
	No/ Unsure	19%	30%
Regularly read the local community newspapers	Yes	61%	56%
	No/ Unsure	39%	44%

	Column %	Cynical shoppers	All respondents
Satisfaction with electricity retailer	Total satisfied	23%	73%
	Total dissatisfied	26%	6%
	Neither satisfied nor dissatisfied/ Unsure	49%	19%
Worthwhile reviewing: electricity retailer	Yes	55%	41%
	No	23%	41%
	Unsure	22%	18%
Worthwhile actively shopping around: electricity retailer	Yes	75%	66%
	No	13%	21%
	Unsure	12%	13%
Likelihood of switching: Electricity retailer	Total likely	38%	23%
	Total unlikely	27%	49%
	Neither likely nor unlikely/ Unsure	35%	27%
Decision maker/ have input: Electricity retailer	Yes	74%	82%
	No/ Unsure	26%	18%
Care about supplier of: Electricity	A lot + A fair amount	69%	73%
	Not that much + Hardly at all	28%	24%
Easy vs. Difficult to switch: electricity provider	Total easy	58%	65%
	Total difficult	16%	14%
	Neither easy or difficult/ Unsure	26%	22%
You have all the information you need to compare the different offers	0-3	22%	11%
	4-6	42%	30%
	7-10	35%	60%
You will choose the deal that is right for your household	0-3	12%	5%
	4-6	37%	25%
	7-10	50%	69%
Switched retailer in the past 12 months or switched the plan you were on with current retailer (Switcher)	Yes	31%	26%
	No/ Unsure	69%	74%
Actively investigated different offers or plans but didn't switch OR reviewed current offer but didn't switch (Reviewer)	Yes	36%	33%
	No/ Unsure	64%	67%
Non-switcher/ Non-reviewer	Yes	33%	42%
	No/ Unsure	67%	58%
Easy vs. Difficult to compare the different offers when deciding whether or not to switch: Electricity retailer	Total easy	33%	52%
	Total difficult	24%	15%
	Neither easy or difficult/ Unsure	41%	29%
Interested in visiting a price comparison website providing tailored information	Total interested	71%	67%
	Total uninterested	6%	8%
	Neither interested nor uninterested/ Unsure	23%	24%
Interested in using a third party or broker	Total interested	26%	24%
	Total uninterested	40%	44%
	Neither interested nor uninterested/ Unsure	34%	31%
Minimum amount to save annually in order to seriously consider charging your company or plan	Less than $100	9%	8%
	$100 but less than $150	15%	15%
	$150 but less than $200	20%	17%
	$200 but less than $250	9%	11%
	$250 or more	29%	30%
	Unsure	18%	19%
Average monthly summer electricity bill	Less than $100 a month	17%	22%
	From $100, but less than $200 a month	38%	44%
	From $200, but less than $300 a month	20%	14%
	$300 or more a month	7%	5%
	Unsure	14%	12%
Average monthly winter electricity bill	Less than $100 a month	4%	7%
	From $100, but less than $200 a month	27%	31%
	From $200, but less than $300 a month	23%	29%
	From $300, but less than $400 a month	18%	12%
	$400 or more a month	13%	8%
	Unsure	13%	10%

10.2.2 Latent shoppers (23%)

The Latent Shoppers segment (23%) showed a below average level of care and average satisfaction ratings. However, they also presented an opportunity as they had lower confidence that they will choose the deal that is right for their household and slightly lower confidence that they have all the information required to compare the different offers.

- **Profile**

Latent shoppers tended to be aged under 30 years, not have children, live with three or more adults, regularly use social media, keep up with the latest technology and do not keep up with the news. Their level of satsifcation with their electricity provider (75% vs. 73%), internet provider (77% vs. 73%) and insurance provider (65% same as all) were in line with the overall results, howerver, they had higher satisfaction ratings for their bank (93% vs. 84%) and their mobile telephone provider (89% vs. 81%).

- **Less likely to be involved in making decisions**

This segment is less likely (72%) to make or have input into the decisions around their electricity retailers compared to the overall sample (82%). They were much less likely to have actively investigated different offers or plans from other electricity retailers and decided not to their switch (27% and 35% for All). Similarly, they were much less likely to have reviewed their current plan (24% vs. 35% for All).

- **Key characteristics**

Column %		Latent shoppers	All respondents
Gender	Male	50%	49%
	Female	50%	51%
Age group	18-29	46%	23%
	30-44	22%	24%
	45-59	20%	26%
	60 plus	12%	27%
Region	Auckland Region	41%	35%
	Wellington Region	9%	11%
	Canterbury Region	14%	13%
	Other North Island	27%	31%
	Other South Island	9%	11%
Reside in a rural area or district with population less than 2,000	Yes	10%	14%
	No/ Unsure	90%	86%
Number of people 18 years of age or older living in household	1	15%	22%
	2	41%	46%
	3 or more	43%	30%
Have dependent children aged under 18 years	Yes	9%	30%
	No/ Unsure	91%	70%
Home ownership	Renting	38%	35%
	I own my home freehold	15%	26%
	I own my home with a mortgage	26%	27%
	I live at home with my parents	15%	8%
Lived at your current residence	1 Less than two years	39%	26%
	2-5 years	26%	28%
	6-10 years	14%	16%
	More than 10 years	22%	29%
Household income	$20,000 or less	9%	9%
	$20,001-30,000	6%	10%
	$30,001-40,000	7%	8%
	$40,001-50,000	6%	8%
	$50,001-60,000	10%	8%
	$60,001-70,000	6%	6%
	$70,001-80,000	5%	7%
	$80,001-90,000	4%	4%
	$90,001-100,000	4%	6%
	More than $100,000	30%	20%
	Income was nil/or made a loss	0%	1%
	Prefer not to say	13%	14%
Full time	Yes	44%	36%
	No/ Unsure	56%	64%
Part time	Yes	13%	15%
	No/ Unsure	87%	85%
Work casually	Yes	2%	3%
	No/ Unsure	98%	97%
Self-employed	Yes	4%	7%
	No/ Unsure	96%	93%
Unemployed	Yes	11%	8%
	No/ Unsure	89%	92%
Retired	Yes	8%	19%
	No/ Unsure	92%	81%
Student	Yes	19%	7%
	No/ Unsure	81%	93%
Homemaker	Yes	4%	9%
	No/ Unsure	96%	91%
Highest educational qualification	No qualification	4%	6%
	Secondary school qualification	33%	30%
	Polytech degree	7%	6%
	Other Polytech qualification	10%	14%
	University qualification	37%	34%
	Trade qualification	9%	9%
Read the newspaper or view it online nearly every day	Yes	34%	56%
	No/ Unsure	66%	44%
Like to keep up with the latest technology	Yes	77%	51%
	No/ Unsure	23%	49%
Go overseas at least once every couple of years	Yes	67%	50%
	No/ Unsure	33%	50%
Often surf the internet	Yes	97%	84%
	No/ Unsure	3%	16%
Involved in a lot of voluntary community activity	Yes	8%	25%
	No/ Unsure	92%	75%
Read the business news just about every day	Yes	8%	25%
	No/ Unsure	92%	75%
Regularly use social media such as Facebook, Twitter or Instagram	Yes	89%	70%
	No/ Unsure	11%	30%
Regularly read the local community newspapers	Yes	17%	56%
	No/ Unsure	83%	44%

	Column %	Latent shoppers	All respondents
Satisfaction with electricity retailer	Total satisfied	75%	73%
	Total dissatisfied	4%	6%
	Neither satisfied nor dissatisfied/ Unsure	19%	19%
Worthwhile reviewing: electricity retailer	Yes	43%	41%
	No	34%	41%
	Unsure	23%	18%
Worthwhile actively shopping around: electricity retailer	Yes	70%	66%
	No	17%	21%
	Unsure	13%	13%
Likelihood of switching: Electricity retailer	Total likely	23%	23%
	Total unlikely	50%	49%
	Neither likely nor unlikely/ Unsure	28%	27%
Decision maker/ have input: Electricity retailer	Yes	72%	82%
	No/ Unsure	28%	18%
Care about supplier of: Electricity	A lot + A fair amount	57%	73%
	Not that much + Hardly at all	39%	24%
Easy vs. Difficult to switch: electricity provider	Total easy	61%	65%
	Total difficult	17%	14%
	Neither easy or difficult/ Unsure	22%	22%
You have all the information you need to compare the different offers	0-3	11%	11%
	4-6	32%	30%
	7-10	57%	60%
You will choose the deal that is right for your household	0-3	6%	5%
	4-6	34%	25%
	7-10	60%	69%
Switched retailer in the past 12 months or switched the plan you were on with current retailer (Switcher)	Yes	22%	26%
	No/ Unsure	78%	74%
Actively investigated different offers or plans but didn't switch OR reviewed current offer but didn't switch (Reviewer)	Yes	25%	33%
	No/ Unsure	75%	67%
Non-switcher/ Non-reviewer	Yes	54%	42%
	No/ Unsure	46%	58%
Easy vs. Difficult to compare the different offers when deciding whether or not to switch: Electricity retailer	Total easy	54%	52%
	Total difficult	13%	15%
	Neither easy or difficult/ Unsure	27%	29%
Interested in visiting a price comparison website providing tailored information	Total interested	71%	67%
	Total uninterested	8%	8%
	Neither interested nor uninterested/ Unsure	21%	24%
Interested in using a third party or broker	Total interested	26%	24%
	Total uninterested	45%	44%
	Neither interested nor uninterested/ Unsure	28%	31%
Minimum amount to save annually in order to seriously consider charging your company or plan	Less than $100	9%	8%
	$100 but less than $150	16%	15%
	$150 but less than $200	18%	17%
	$200 but less than $250	13%	11%
	$250 or more	24%	30%
	Unsure	21%	19%
Average monthly summer electricity bill	Less than $100 a month	21%	22%
	From $100, but less than $200 a month	40%	44%
	From $200, but less than $300 a month	10%	14%
	$300 or more a month	7%	5%
	Unsure	20%	12%
Average monthly winter electricity bill	Less than $100 a month	5%	7%
	From $100, but less than $200 a month	31%	31%
	From $200, but less than $300 a month	25%	29%
	From $300, but less than $400 a month	11%	12%
	$400 or more a month	8%	8%
	Unsure	17%	10%

10.2.3 Unconvinced shoppers (18%)

The Unconvinced Shoppers segment (18%) exhibited below average care and a reasonable level satisfaction with their electricity retailer. They had below average confidence that they would choose the deal that is right for their household and average confidence that they have all the information required to compare different offers. They were less likely to value reviewing or shopping around.

■ Profile

Unconvinced Shoppers tended to be older, retired, not have children, own their home freehold, do not keep up with social media, technology or the internet and are more likely to have lived at their current residence for more than ten years.

■ Do not think it is worthwhile to review or actively shop around

This segment was more sceptical about whether it was worthwhile to either actively shop around for the best deal for electricity retailers (53% vs. 66% All) or review electricity retailers (31% vs. 41% All). They seem unengaged with the idea of investigating and switching, they are more likely to give a neutral answer (neither easy nor difficult) to the level of ease of comparing different offers when deciding whether or not to switch electricity providers (38% compared to 29% All) and were also less interested in a comparison website (50% vs. 67% All).

■ Key characteristics

	Column %	Unconvinced shoppers	All respondents
Gender	Male	51%	49%
	Female	49%	51%
Age group	18-29	10%	23%
	30-44	18%	24%
	45-59	30%	26%
	60 plus	42%	27%
Region	Auckland Region	32%	35%
	Wellington Region	11%	11%
	Canterbury Region	16%	13%
	Other North Island	29%	31%
	Other South Island	11%	11%
Reside in a rural area or district with population less than 2,000	Yes	12%	14%
	No/ Unsure	88%	86%
Number of people 18 years of age or older living in household	1	32%	22%
	2	39%	46%
	3 or more	23%	30%
Have dependent children aged under 18 years	Yes	8%	30%
	No/ Unsure	92%	70%
Home ownership	Renting	24%	35%
	I own my home freehold	40%	26%
	I own my home with a mortgage	23%	27%
	I live at home with my parents	6%	8%
Lived at your current residence	1 Less than two years	12%	26%
	2-5 years	22%	28%
	6-10 years	21%	16%
	More than 10 years	42%	29%
Household income	$20,000 or less	10%	9%
	$20,001-30,000	12%	10%
	$30,001-40,000	10%	8%
	$40,001-50,000	12%	8%
	$50,001-60,000	6%	8%
	$60,001-70,000	4%	6%
	$70,001-80,000	7%	7%
	$80,001-90,000	5%	4%
	$90,001-100,000	4%	6%
	More than $100,000	16%	20%
	Income was nil/or made a loss	0%	1%
	Prefer not to say	15%	14%
Full time	Yes	28%	36%
	No/ Unsure	72%	64%
Part time	Yes	15%	15%
	No/ Unsure	85%	85%
Work casually	Yes	2%	3%
	No/ Unsure	98%	97%
Self-employed	Yes	7%	7%
	No/ Unsure	93%	93%
Unemployed	Yes	10%	8%
	No/ Unsure	90%	92%
Retired	Yes	30%	19%
	No/ Unsure	70%	81%
Student	Yes	3%	7%
	No/ Unsure	97%	93%
Homemaker	Yes	4%	9%
	No/ Unsure	96%	91%
Highest educational qualification	No qualification	7%	6%
	Secondary school qualification	25%	30%
	Polytech degree	7%	6%
	Other Polytech qualification	16%	14%
	University qualification	30%	34%
	Trade qualification	12%	9%
Read the newspaper or view it online nearly every day	Yes	50%	56%
	No/ Unsure	50%	44%
Like to keep up with the latest technology	Yes	12%	51%
	No/ Unsure	88%	49%
Go overseas at least once every couple of years	Yes	31%	50%
	No/ Unsure	69%	50%
Often surf the internet	Yes	37%	84%
	No/ Unsure	63%	16%
Involved in a lot of voluntary community activity	Yes	16%	25%
	No/ Unsure	84%	75%
Read the business news just about every day	Yes	20%	25%
	No/ Unsure	80%	75%
Regularly use social media such as Facebook, Twitter or Instagram	Yes	21%	70%
	No/ Unsure	79%	30%
Regularly read the local community newspapers	Yes	56%	56%
	No/ Unsure	44%	44%

	Column %	Unconvinced shoppers	All respondents
Satisfaction with electricity retailer	Total satisfied	74%	73%
	Total dissatisfied	4%	6%
	Neither satisfied nor dissatisfied/ Unsure	20%	19%
Worthwhile reviewing: electricity retailer	Yes	31%	41%
	No	44%	41%
	Unsure	25%	18%
Worthwhile actively shopping around: electricity retailer	Yes	53%	66%
	No	26%	21%
	Unsure	21%	13%
Likelihood of switching: Electricity retailer	Total likely	17%	23%
	Total unlikely	54%	49%
	Neither likely nor unlikely/ Unsure	29%	27%
Decision maker/ have input: Electricity retailer	Yes	82%	82%
	No/ Unsure	18%	18%
Care about supplier of: Electricity	A lot + A fair amount	57%	73%
	Not that much + Hardly at all	40%	24%
Easy vs. Difficult to switch: electricity provider	Total easy	59%	65%
	Total difficult	13%	14%
	Neither easy or difficult/ Unsure	28%	22%
You have all the information you need to compare the different offers	0-3	9%	11%
	4-6	38%	30%
	7-10	53%	60%
You will choose the deal that is right for your household	0-3	5%	5%
	4-6	32%	25%
	7-10	63%	69%
Switched retailer in the past 12 months or switched the plan you were on with current retailer (Switcher)	Yes	18%	26%
	No/ Unsure	82%	74%
Actively investigated different offers or plans but didn't switch OR reviewed current offer but didn't switch (Reviewer)	Yes	29%	33%
	No/ Unsure	71%	67%
Non-switcher/ Non-reviewer	Yes	53%	42%
	No/ Unsure	47%	58%
Easy vs. Difficult to compare the different offers when deciding whether or not to switch: Electricity retailer	Total easy	41%	52%
	Total difficult	17%	15%
	Neither easy or difficult/ Unsure	38%	29%
Interested in visiting a price comparison website providing tailored information	Total interested	50%	67%
	Total uninterested	15%	8%
	Neither interested nor uninterested/ Unsure	34%	24%
Interested in using a third party or broker	Total interested	18%	24%
	Total uninterested	46%	44%
	Neither interested nor uninterested/ Unsure	36%	31%
Minimum amount to save annually in order to seriously consider charging your company or plan	Less than $100	9%	8%
	$100 but less than $150	14%	15%
	$150 but less than $200	14%	17%
	$200 but less than $250	10%	11%
	$250 or more	25%	30%
	Unsure	28%	19%
Average monthly summer electricity bill	Less than $100 a month	28%	22%
	From $100, but less than $200 a month	39%	44%
	From $200, but less than $300 a month	13%	14%
	$300 or more a month	2%	5%
	Unsure	15%	12%
Average monthly winter electricity bill	Less than $100 a month	10%	7%
	From $100, but less than $200 a month	35%	31%
	From $200, but less than $300 a month	27%	29%
	From $300, but less than $400 a month	10%	12%
	$400 or more a month	3%	8%
	Unsure	12%	10%

10.2.4 Complacent shoppers (22%)

Complacent Shoppers (22%) claimed to care a lot about the household suppliers they choose but were also highly satisfied with the service they receive. They were confident in their choices which appeared to make them unlikely to switch.

- **Profile**

Complacent Shoppers are more likely to be female, aged between 30 and 44, have children, regularly use social media, surf the internet, do not keep up with the business news and rarely go overseas. They are highly satisfied with the household suppliers and care about the suppliers they choose. This segment has the highest proportion of renters (47%) but close to one third of this segment own their own home with a mortgage (31%).

- **Views on electricity retailers are mostly neutral**

This segment has mostly views that match the overall views across the board on electricity retailers. However, they are more likely to indicate that it is easy to compare different electricity offers when deciding whether or not to switch (62% compared to 52% All). This segment were less likely to state it is worthwhile reviewing their electricity retailer (35% compared to 41% All) but two-thirds (66%) think it is worthwhile to actively shop around (equal to the All figure).

- **Key characteristics**

	Column %	Complacent shoppers	All respondents
Gender	Male	37%	49%
	Female	63%	51%
Age group	18-29	16%	23%
	30-44	38%	24%
	45-59	25%	26%
	60 plus	21%	27%
Region	Auckland Region	28%	35%
	Wellington Region	10%	11%
	Canterbury Region	11%	13%
	Other North Island	37%	31%
	Other South Island	14%	11%
Reside in a rural area or district with population less than 2,000	Yes	20%	14%
	No/ Unsure	80%	86%
Number of people 18 years of age or older living in household	1	23%	22%
	2	52%	46%
	3 or more	24%	30%
Have dependent children aged under 18 years	Yes	63%	30%
	No/ Unsure	37%	70%
Home ownership	Renting	47%	35%
	I own my home freehold	15%	26%
	I own my home with a mortgage	31%	27%
	I live at home with my parents	4%	8%
Lived at your current residence	1 Less than two years	31%	26%
	2-5 years	33%	28%
	6-10 years	14%	16%
	More than 10 years	22%	29%
Household income	$20,000 or less	14%	9%
	$20,001-30,000	11%	10%
	$30,001-40,000	8%	8%
	$40,001-50,000	5%	8%
	$50,001-60,000	7%	8%
	$60,001-70,000	7%	6%
	$70,001-80,000	7%	7%
	$80,001-90,000	4%	4%
	$90,001-100,000	8%	6%
	More than $100,000	15%	20%
	Income was nil/or made a loss	0%	1%
	Prefer not to say	13%	14%
Full time	Yes	29%	36%
	No/ Unsure	71%	64%
Part time	Yes	18%	15%
	No/ Unsure	82%	85%
Work casually	Yes	7%	3%
	No/ Unsure	93%	97%
Self-employed	Yes	7%	7%
	No/ Unsure	93%	93%
Unemployed	Yes	8%	8%
	No/ Unsure	92%	92%
Retired	Yes	16%	19%
	No/ Unsure	84%	81%
Student	Yes	3%	7%
	No/ Unsure	97%	93%
Homemaker	Yes	20%	9%
	No/ Unsure	80%	91%
Highest educational qualification	No qualification	10%	6%
	Secondary school qualification	37%	30%
	Polytech degree	3%	6%
	Other Polytech qualification	16%	14%
	University qualification	26%	34%
	Trade qualification	7%	9%
Read the newspaper or view it online nearly every day	Yes	50%	56%
	No/ Unsure	50%	44%
Like to keep up with the latest technology	Yes	37%	51%
	No/ Unsure	63%	49%
Go overseas at least once every couple of years	Yes	22%	50%
	No/ Unsure	78%	50%
Often surf the internet	Yes	96%	84%
	No/ Unsure	4%	16%
Involved in a lot of voluntary community activity	Yes	28%	25%
	No/ Unsure	72%	75%
Read the business news just about every day	Yes	5%	25%
	No/ Unsure	95%	75%
Regularly use social media such as Facebook, Twitter or Instagram	Yes	84%	70%
	No/ Unsure	16%	30%
Regularly read the local community newspapers	Yes	65%	56%
	No/ Unsure	35%	44%

	Column %	Complacent shoppers	All respondents
Satisfaction with electricity retailer	Total satisfied	89%	73%
	Total dissatisfied	2%	6%
	Neither satisfied nor dissatisfied/ Unsure	7%	19%
Worthwhile reviewing: electricity retailer	Yes	35%	41%
	No	53%	41%
	Unsure	13%	18%
Worthwhile actively shopping around: electricity retailer	Yes	66%	66%
	No	23%	21%
	Unsure	12%	13%
Likelihood of switching: Electricity retailer	Total likely	17%	23%
	Total unlikely	59%	49%
	Neither likely nor unlikely/ Unsure	23%	27%
Decision maker/ have input: Electricity retailer	Yes	86%	82%
	No/ Unsure	14%	18%
Care about supplier of: Electricity	A lot + A fair amount	91%	73%
	Not that much + Hardly at all	7%	24%
Easy vs. Difficult to switch: electricity provider	Total easy	67%	65%
	Total difficult	12%	14%
	Neither easy or difficult/ Unsure	21%	22%
You have all the information you need to compare the different offers	0-3	9%	11%
	4-6	22%	30%
	7-10	69%	60%
You will choose the deal that is right for your household	0-3	3%	5%
	4-6	15%	25%
	7-10	82%	69%
Switched retailer in the past 12 months or switched the plan you were on with current retailer (Switcher)	Yes	27%	26%
	No/ Unsure	73%	74%
Actively investigated different offers or plans but didn't switch OR reviewed current offer but didn't switch (Reviewer)	Yes	34%	33%
	No/ Unsure	66%	67%
Non-switcher/ Non-reviewer	Yes	40%	42%
	No/ Unsure	60%	58%
Easy vs. Difficult to compare the different offers when deciding whether or not to switch: Electricity retailer	Total easy	62%	52%
	Total difficult	11%	15%
	Neither easy or difficult/ Unsure	24%	29%
Interested in visiting a price comparison website providing tailored information	Total interested	67%	67%
	Total uninterested	7%	8%
	Neither interested nor uninterested/ Unsure	26%	24%
Interested in using a third party or broker	Total interested	22%	24%
	Total uninterested	44%	44%
	Neither interested nor uninterested/ Unsure	34%	31%
Minimum amount to save annually in order to seriously consider charging your company or plan	Less than $100	6%	8%
	$100 but less than $150	18%	15%
	$150 but less than $200	14%	17%
	$200 but less than $250	12%	11%
	$250 or more	33%	30%
	Unsure	16%	19%
Average monthly summer electricity bill	Less than $100 a month	20%	22%
	From $100, but less than $200 a month	53%	44%
	From $200, but less than $300 a month	13%	14%
	$300 or more a month	4%	5%
	Unsure	9%	12%
Average monthly winter electricity bill	Less than $100 a month	6%	7%
	From $100, but less than $200 a month	30%	31%
	From $200, but less than $300 a month	37%	29%
	From $300, but less than $400 a month	11%	12%
	$400 or more a month	9%	8%
	Unsure	6%	10%

10.2.5 Informed shoppers (22%)

Informed Shoppers (22%) had high care ratings and satisfaction ratings. They were confident that they were on the best deal and had the information they needed to make a good decision. They were more likely to find it easy to switch their electricity retailer and had switched or actively investigated different offers or plans which may be reinforcing the perception that they were on the best deal.

Profile

Informed Shoppers tended to be male, aged 60 plus, not have children, own their own home freehold, go on overseas trips and keep up to date with news, business, the community and technology. They also had high levels of satisfaction and care for their houshold suppliers.

Interested and satisfied with their electricity retailers

This segment was mostly made up of people who make or have input into decisions (92% vs. 82% All) for their electricity retailer. They tended to believe that switching retailers was easy (75% vs. 65% All) and they were confident about comparing (75%) and choosing (85%) different offers (60% and 69% for All). They rated most switching factors as much more important than the overall sample and had a higher level of interest in a comparison website (75% vs. 67% All).

Key characteristics

	Column %	Informed shoppers	All respondents
Gender	Male	61%	49%
	Female	39%	51%
Age group	18-29	17%	23%
	30-44	15%	24%
	45-59	23%	26%
	60 plus	44%	27%
Region	Auckland Region	34%	35%
	Wellington Region	11%	11%
	Canterbury Region	11%	13%
	Other North Island	32%	31%
	Other South Island	12%	11%
Reside in a rural area or district with population less than 2,000	Yes	11%	14%
	No/ Unsure	89%	86%
Number of people 18 years of age or older living in household	1	20%	22%
	2	52%	46%
	3 or more	27%	30%
Have dependent children aged under 18 years	Yes	23%	30%
	No/ Unsure	77%	70%
Home ownership	Renting	29%	35%
	I own my home freehold	43%	26%
	I own my home with a mortgage	21%	27%
	I live at home with my parents	4%	8%
Lived at your current residence	1 Less than two years	20%	26%
	2-5 years	27%	28%
	6-10 years	17%	16%
	More than 10 years	37%	29%
Household income	$20,000 or less	4%	9%
	$20,001-30,000	11%	10%
	$30,001-40,000	11%	8%
	$40,001-50,000	9%	8%
	$50,001-60,000	8%	8%
	$60,001-70,000	9%	6%
	$70,001-80,000	6%	7%
	$80,001-90,000	4%	4%
	$90,001-100,000	7%	6%
	More than $100,000	20%	20%
	Income was nil/or made a loss	0%	1%
	Prefer not to say	13%	14%
Full time	Yes	39%	36%
	No/ Unsure	61%	64%
Part time	Yes	15%	15%
	No/ Unsure	85%	85%
Work casually	Yes	2%	3%
	No/ Unsure	98%	97%
Self-employed	Yes	11%	7%
	No/ Unsure	89%	93%
Unemployed	Yes	2%	8%
	No/ Unsure	98%	92%
Retired	Yes	29%	19%
	No/ Unsure	71%	81%
Student	Yes	4%	7%
	No/ Unsure	96%	93%
Homemaker	Yes	3%	9%
	No/ Unsure	97%	91%
Highest educational qualification	No qualification	4%	6%
	Secondary school qualification	27%	30%
	Polytech degree	6%	6%
	Other Polytech qualification	11%	14%
	University qualification	42%	34%
	Trade qualification	8%	9%
Read the newspaper or view it online nearly every day	Yes	92%	56%
	No/ Unsure	8%	44%
Like to keep up with the latest technology	Yes	75%	51%
	No/ Unsure	25%	49%
Go overseas at least once every couple of years	Yes	81%	50%
	No/ Unsure	19%	50%
Often surf the internet	Yes	90%	84%
	No/ Unsure	10%	16%
Involved in a lot of voluntary community activity	Yes	43%	25%
	No/ Unsure	57%	75%
Read the business news just about every day	Yes	73%	25%
	No/ Unsure	27%	75%
Regularly use social media such as Facebook, Twitter or Instagram	Yes	67%	70%
	No/ Unsure	33%	30%
Regularly read the local community newspapers	Yes	83%	56%
	No/ Unsure	17%	44%

	Column %	Informed shoppers	All respondents
Satisfaction with electricity retailer	Total satisfied	89%	73%
	Total dissatisfied	2%	6%
	Neither satisfied nor dissatisfied/ Unsure	8%	19%
Worthwhile reviewing: electricity retailer	Yes	43%	41%
	No	48%	41%
	Unsure	10%	18%
Worthwhile actively shopping around: electricity retailer	Yes	66%	66%
	No	26%	21%
	Unsure	8%	13%
Likelihood of switching: Electricity retailer	Total likely	25%	23%
	Total unlikely	52%	49%
	Neither likely nor unlikely/ Unsure	23%	27%
Decision maker/ have input: Electricity retailer	Yes	92%	82%
	No/ Unsure	8%	18%
Care about supplier of: Electricity	A lot + A fair amount	89%	73%
	Not that much + Hardly at all	10%	24%
Easy vs. Difficult to switch: electricity provider	Total easy	75%	65%
	Total difficult	11%	14%
	Neither easy or difficult/ Unsure	14%	22%
You have all the information you need to compare the different offers	0-3	5%	11%
	4-6	20%	30%
	7-10	75%	60%
You will choose the deal that is right for your household	0-3	3%	5%
	4-6	12%	25%
	7-10	85%	69%
Switched retailer in the past 12 months or switched the plan you were on with current retailer (Switcher)	Yes	31%	26%
	No/ Unsure	69%	74%
Actively investigated different offers or plans but didn't switch OR reviewed current offer but didn't switch (Reviewer)	Yes	40%	33%
	No/ Unsure	60%	67%
Non-switcher/ Non-reviewer	Yes	28%	42%
	No/ Unsure	72%	58%
Easy vs. Difficult to compare the different offers when deciding whether or not to switch: Electricity retailer	Total easy	63%	52%
	Total difficult	14%	15%
	Neither easy or difficult/ Unsure	20%	29%
Interested in visiting a price comparison website providing tailored information	Total interested	75%	67%
	Total uninterested	7%	8%
	Neither interested nor uninterested/ Unsure	18%	24%
Interested in using a third party or broker	Total interested	29%	24%
	Total uninterested	45%	44%
	Neither interested nor uninterested/ Unsure	26%	31%
Minimum amount to save annually in order to seriously consider charging your company or plan	Less than $100	7%	8%
	$100 but less than $150	14%	15%
	$150 but less than $200	18%	17%
	$200 but less than $250	11%	11%
	$250 or more	38%	30%
	Unsure	12%	19%
Average monthly summer electricity bill	Less than $100 a month	23%	22%
	From $100, but less than $200 a month	47%	44%
	From $200, but less than $300 a month	15%	14%
	$300 or more a month	7%	5%
	Unsure	5%	12%
Average monthly winter electricity bill	Less than $100 a month	8%	7%
	From $100, but less than $200 a month	33%	31%
	From $200, but less than $300 a month	33%	29%
	From $300, but less than $400 a month	14%	12%
	$400 or more a month	7%	8%
	Unsure	4%	10%

Appendix

11.1 Demographic profile

Sample information/ demographics

	2018
	%
Sex	
Male	49
Female	51
Age	
18-29	22
30-44	26
45-59	26
60 plus	26
Region	
Auckland	35
Wellington	11
Provincial North Island	31
Christchurch	13
Provincial South Island	11
Household income	
Less than $20,000	9
$20,001-30,000	10
$30,001-40,000	8
$40,001-50,000	8
$50,001-60,000	8
$60,001-70,000	6
$70,001-80,000	7
$80,001-90,000	4
$90,001-100,000	6
More than $100,000	20
Income was nil/or made a loss	1
Would prefer not to say	14
Dependent children	
Yes	30
No/Unsure	70
Home ownership	
Renting	35
Own my home freehold	26
Own my home with a mortgage	27
Live at home with my parents	7
Other	3
Prefer not to say	1

Base: All respondents (n=1,200)

Electricity provider

What is the name of the company that you pay your monthly electricity bills to?			
	2015	**2016**	**2018**
	%	**%**	**%**
Genesis Energy	21.7	21.9	19.5
Mercury Energy	14.9	16.2	18.8
Contact Energy	23.1	19.6	18.2
Trustpower	11.1	10.9	11.1
Meridian Energy	7.4	9.4	7.9
Powershop NZ	4.9	3.6	4.3
Energy Online	3.8	2.9	3.3
Pulse Energy	1.2	1.7	2.5
Nova Energy	3.3	2.7	2.3
Electric Kiwi	-	1.1	1.6
Flick Electric	0.4	0.8	1.2
Glo-Bug	0.9	1.5	1.1
Grey Power Electricity	1.5	1.4	0.8
Just Energy	0.4	0.7	0.3
Tiny Mighty Power	0.8	0.6	0.2
Payless Energy	0.1	-	0.1
Empower	0.1	-	0.1
Bosco Connect	0.3	0.4	0.1
Bay of Plenty Electricity	-	0.1	-
Energy Direct	0.7	0.1	-
Hampton Electric		0.1	-
King Country Energy	0.1	-	-
Mega Energy	0.1	-	-
Opunake Hydro	-	0.1	-
Simply Energy	-	0.1	-
Other	1.2	1.1	3.6
Unsure	1.8	2.9	3.2

Base: All respondents (n=1,200)

Average electricity bill

*How much on average is your monthly **summer/winter** bill (that would be in….)*	2015	2016	2018
	%	**%**	**%**
Summer (that would be in December, January and February)			
Less than $100 a month	19	23	22
From $100, but less than $200 a month	46	42	44
From $200, but less than $300 a month	14	14	14
From $300, but less than $400 a month	4	3	3
$400 or more a month	2	1	2
Unsure/prefer not to say	15	18	15
Winter (that would be in June, July and August)			
Less than $100 a month	7	8	7
From $100, but less than $200 a month	32	32	31
From $200, but less than $300 a month	27	26	29
From $300, but less than $400 a month	13	13	12
$400 or more a month	9	5	8
Unsure/prefer not to say	12	16	12

Base: All respondents (n=1,200)

11.2 Detailed segmentation tables

11.2.1 Cynical shoppers (16%)

View of household suppliers
Less likely to be Satisfied (Total 1+2 = Total satisfied, where 1=Very satisfied):
• On average this segment had lower satisfaction for each household supplier than the overall sample • For electricity retailers this was 23% satisfied compared to 73% of the overall sample
More likely to think it worthwhile reviewing providers:
• On average this segment were more likely to believe it is worthwhile reviewing household service providers • For electricity retailers this was 55% 'Yes' compared to 41% of the overall sample
More likely to switch (Total = Very likely + fairly likely):
• On average this segment were more likely to say that they would switch providers • For electricity retailers this was 38% likely compared to 23% of the overall sample
Slightly below average level of care (Total = A lot + A fair amount):
• On average this segment's level of care was in line with the overall results across the services measured • For electricity retailers this was 69% care compared to 73% of the overall sample
View of electricity retailer
Gave low positive ratings (Total 7-10 = Total positive, where 10=Excellent):
• Overall quality of customer service (42% vs. 67% of All) • Overall value for money for the products and services (29% vs. 61% of All) • Being well established (50% vs. 72% of All) • The payment solutions they offer (41% vs. 69% of All) • The electricity plans they offer (31% vs. 59% of All)
Barriers to taking action
Low levels of confidence about choosing and comparing deals (Total 7-10 = Total confident, where 10=Extremely confident):
• You have all the information you need to compare the different offers (35% vs. 60% of All) • You will choose the deal that is right for your household (50% vs. 69% of All)
Importance of factors when switching (Total 7-10 = Total important, where 10=Extremely important):
• Less likely to think that brand and reputation of the company is important (59% vs. 68% All)
More likely to think comparing household services is difficult (Difficult = Fairly difficult + Very difficult):
• On average this segment had higher levels of difficulty for most household suppliers • However, for electricity retailers this was in line with the overall result (16% vs. 14% of All) • And, only one-third (33%) think that it is easy to compare different offers when deciding whether or not to switch (vs. 52% of All)
Other
Behaviour:
• Less likely to keep up with latest technology (43% vs. 51%) • Less likely go overseas at least once every couple of years (40% vs. 50%) • More likely to surf the net (95% vs. 84%) • More likely to regularly use social media (81% vs. 70%)
Demographics:
• Aged between 45 and 59 (33% vs. 26% All) • Have dependents (47% vs. 30%)

11.2.2 Latent shoppers (23%)

View of household suppliers
Less likely to be the decision maker or have input into decisions for some household services
• Electricity retailers (72% vs. 82% All) • Internet provider (76% vs. 84% All)
Barriers to taking action
Less likely be confident about choosing right deal (Total 7-10 = Total confident, where 10=Extremely confident):
• You will choose the deal that is right for your household (60% vs. 69% of All)
Reviewing, shopping around and switching
Less likely to switch or actively investigate different offers or plans from other electricity retailers:
• Over half (54%) of this segment are NOT reviewers and NOT switchers • Just over a quarter (27%) were much less likely to have actively investigated offers or plans from other retailers (compared to 35% of All) and they were much less likely to have reviewed their current plan (24% vs. 35% for All)
Other
Behaviour:
More likely: • Often surf the web (97% vs. 84% All) • Regularly use social media such as Facebook, Twitter or Instagram (89% vs. 70% All) • Like to keep up with the latest technology (77% vs. 51% All) • Go overseas at least once every couple of years (67% vs. 50% All) **Less likely:** • Read the newspaper or view it online nearly every day (34% vs. 56% All) • Regularly read the local community newspapers (17% vs. 56% All) • Involved in a lot of voluntary community activity (8% vs. 25% All) • Read the business new just about every day (8% vs. 25% All)
Demographics:
• Aged 18-29 (46% vs. 23% All) • Male 50%, Female 50% • Have dependent children aged under 18 years (9% vs. 30% All) • Live with three or more people aged over 18 (43% vs. 30% All) • Live at home with parents (15% vs. 8% All)

11.2.3 Unconvinced shoppers (18%)

View of household suppliers
Less likely to think it worthwhile reviewing providers:
• On average this segment were less likely to believe it is worthwhile reviewing household service providers • For electricity retailers this was 31% 'Yes' compared to 41% of the overall sample
Less likely to think it worthwhile to actively shop around for the best deal:
• On average this segment were less likely to believe it is worthwhile shopping around for best deals • For electricity retailers this was 53% 'Yes' compared to 66% of the overall sample
Barriers to taking action
More likely to be neutral on ease of comparing electricity retailers/ ease of switching (Neither easy nor difficult + unsure):
• 38% indicated they thought comparing different offers when deciding was 'neither easy nor difficult' or were 'unsure' compared to 29% • 28% thought switching electricity retailer was 'neither easy nor difficult' or were 'unsure' compared to 22% of the overall sample
Retail data options
Lower interest in a comparison website (Total = Very interested + Fairly interested):
• 50% of this segment expressed interest in a website compared to 67% of the overall sample
Other
Behaviour:
Less likely: • Often surf the web (37% vs. 84% All) • Go overseas at least once every couple of years (31% vs. 50% All) • Regularly use social media such as Facebook, Twitter or Instagram (21% vs. 70% All) • Involved in a lot of voluntary community activity (16% vs. 25% All) • Like to keep up with the latest technology (12% vs. 51% All)
Demographics:
• Aged 60 or over (42% vs. 27% All) • Have dependent children aged under 18 years (8% vs. 30% All) • I own my home freehold (40% vs. 26% All) • In full time work (28% vs. 36% All) • Retired (30% vs. 19% All) • Have lived at current residence for more than 10 years (42% vs. 29% All)

11.2.4 Complacent shoppers (22%)

View of household suppliers
More likely to be Satisfied (Total 1+2 = Total satisfied, where 1=Very satisfied):
• On average this segment had higher levels of satisfaction for each household supplier compared to the overall sample • For electricity retailers this was 89% satisfied compared to 73% of the overall sample
High level of care (Total = A lot + A fair amount):
• 91% said they care about which electricity retailer they choose compared to 73% overall sample
High level of confidence (Total = 7-10 = Total confident, where 10=Extremely confident):
• 82% said they are confident that they will choose the right deal for their household compared to 69% overall • 69% said they are confident that they have all the information they need to compare the different offers compared to 60% overall
View of electricity retailer
More likely to give positive ratings (Total 7-10 = Total positive, where 10=Excellent):
• Overall quality of customer service (82% vs. 67% of All) • Overall value for money for the products and services (76% vs. 61% of All) • Being well established (82% vs. 72% of All) • Payment solutions they offer (81% vs. 69% of All) • The electricity plans they offer (69% vs. 59% of All)
Other
Behaviour:
More likely: • Often surf the web (96% vs. 84% All) • Regularly use social media such as Facebook, Twitter or Instagram (84% vs. 70% All) • Regularly read the local community newspapers (65% vs. 56% All) **Less likely:** • Read the newspaper or view it online nearly every day (50% vs. 56% All) • Like to keep up with the latest technology (37% vs. 51% All) • Go overseas at least once every couple of years (22% vs. 50% All) • Read the business new just about every day (5% vs. 25% All)
Demographics:
• More likely to be female (63% vs. 51% All) • Aged between 30 and 44 (38% vs. 24% All) • Have dependent children aged under 18 years (63% vs. 30% All) • Renting (47% vs. 35% All) • Lower level of education (47% no qual. or secondary qual. vs. 36% for All)

11.2.5 Informed shoppers (22%)

View of household suppliers
More likely to be satisfied (Total 1+2 = Total satisfied, where 1=Very satisfied):
• On average this segment had higher levels of satisfaction for each household supplier compared to All • For electricity retailers this was 89% satisfied compared to 73% of the overall sample
More likely to make decisions or have input into decisions
• More likely to be the decision maker for almost all household services than the overall sample • For electricity retailers this was 92% decision makers compared to 82% of the overall sample
More likely to care (Total = A lot + A fair amount):
• More likely to care about who their suppliers were across all services • For electricity retailers this was 89% care compared to 73% of the overall sample
More likely to think switching is easy (Total = Very easy + Fairly easy):
• More likely to believe it is easy to change suppliers of household services • For electricity retailers this was 75% easy compared to 65% of the overall sample
View of electricity retailer
More likely to give positive ratings (Total 7-10 = Total positive, where 10=Excellent):
• Overall quality of customer service (79% vs. 67% of All) • Overall value for money for the products and services (75% vs. 61% of All) • Being well established (81% vs. 72% of All) • The payment solutions they offer (83% vs. 69% of All) • The electricity plans they offer (76% vs. 59% of All)
More likely be confident about choosing and comparing deals (Total 7-10 = Total confident, where 10=Extremely confident):
• You have all the information you need to compare the different offers (75% vs. 60% of All) • You will choose the deal that is right for your household (85% vs. 69% of All)
Reviewing, shopping around and switching
More likely to actively investigate different offers or plans from other electricity retailers but did not end up switching:
• 46% of this segment has actively investigated compared to 35% of the overall sample
More likely to have reviewed their current offer but did not switch
• 51% of this segment was a reviewer but did not end up switching compared to 35% of the overall sample
Barriers to taking action
Importance of factors when switching (Total 7-10 = total important, where 10=Extremely important):
• The price per kilowatt hour (kWh) (89% vs. 83%) • The discount offered (91% vs. 85%) • Whether the price per kilowatt hour (kWh) can change during the contract (86% vs. 76% All) • The terms and conditions of the contract (86% vs. 78% All) • Brand and reputation of the company (76% vs. 68% All)
Use of price comparison website
Interest in a comparison website (Total = Very interested + Fairly interested)
• 75% of this segment expressed interest in a website compared to 67% of the overall sample
Other
Behaviour:
More likely: • Read the newspaper or view it online nearly every day (92% vs. 56% All) • Often surf the web (90% vs. 84% All) • Regularly read the local community newspapers (83% vs. 56% All) • Go overseas at least once every couple of years (81% vs. 50% All) • Like to keep up with the latest technology (75% vs. 51% All) • Read the business new just about every day (73% vs. 25% All) • Involved in a lot of voluntary community activity (43% vs. 25% All)

Demographics:
More likely: • Male (61% vs. 49% All) • Aged 60 or over (44% vs. 27% All) • I own my home freehold (43% vs. 26% All) • Lived in current residence for 10 years or more (37% vs. 29% All) • Retired (29% vs. 19% All) **Less likely:** • Have dependent children aged under 18 years (23% vs. 30% All)

11.3 Tables

11.3.1 Summary table

Summary table – 2018

	How satisfied are you with your provider of the following services? Please think about your main provider. *	*Base*:*	*Do you think it is worthwhile reviewing your provider of the following services?*	*Do you think it is worthwhile to actively shop around for the best deal for your supplier of:*	*How likely are you to switch the following providers?*	*Are you the person that makes the decision about using the following suppliers or has input in that decision for your household?*	*How much do you care about the following suppliers you choose for your household?*	*How easy or difficult do you think it is to switch your provider of the following services?*
	TOTAL SATISFIED %		Yes %	Yes %	TOTAL LIKELY %	Yes %	TOTAL A LOT + A FAIR AMOUNT %	TOTAL EASY %
Bank	84	*1,190*	30	48	14	92	84	46
Mobile telephone provider	81	*1,178*	38	63	20	92	78	72
Internet provider	73	*1,174*	43	67	28	84	77	61
Electricity retailer	73	*1,177*	41	66	23	82	73	65
Insurance provider	65	*1,063*	40	62	21	86	77	55

*Base: All respondents (n=1200); excludes 'not applicable' where relevant

Summary table – 2016

	*How satisfied are you with your provider of the following services? Please think about your main provider.**	*Base*:*	*Do you think it is worthwhile reviewing your provider of the following services?*	*Do you think it is worthwhile to actively shop around for the best deal for your supplier of:*	*How likely are you to switch the following providers?*	*Are you the person that makes the decision about using the following suppliers or has input in that decision for your household?*	*How much do you care about the following suppliers you choose for your household?*	*How easy or difficult do you think it is to switch your provider of the following services?*
	TOTAL SATISFIED %		Yes %	Yes %	TOTAL LIKELY %	Yes %	TOTAL A LOT + A FAIR AMOUNT %	TOTAL EASY %
Bank	82	*1,200*	30	52	11	92	84	45
Mobile telephone provider	74	*1,179*	36	65	18	92	77	68
Electricity retailer	69	*1,173*	38	66	21	81	74	60
Internet provider	69	*1,181*	43	67	25	83	79	53
Insurance provider	60	*1,046*	39	64	16	86	76	54

*Base: All respondents (n=1200); excludes 'not applicable' where relevant

Summary table – 2015

	How satisfied are you with your provider of the following services? Please think about your main provider.*	Base*:	Do you think it is worthwhile reviewing your provider of the following services?	Do you think it is worthwhile to actively shop around for the best deal for your supplier of:	How likely are you to switch the following providers?	Are you the person that makes the decision about using the following suppliers or has input in that decision for your household?	How much do you care about the following suppliers you choose for your household?	How easy or difficult do you think it is to switch your provider of the following services?
	TOTAL SATISFIED %		Yes %	Yes %	TOTAL LIKELY %	Yes %	TOTAL A LOT + A FAIR AMOUNT %	TOTAL EASY %
Bank	84	*1200*	25	49	10	89	83	44
Mobile telephone provider	79	*1167*	32	61	17	90	78	67
Electricity retailer	72	*1170*	37	65	23	81	75	59
Internet provider	71	*1177*	40	67	25	84	78	52
Insurance provider	64	*1060*	34	64	17	85	77	51

*Base: All respondents (n=1200); excludes 'not applicable' where relevant

11.3.2 View of household suppliers

Satisfaction with providers – 2018

How satisfied are you with your provider of the following services? Please think about your main provider.

	Very satisfied %	Somewhat satisfied %	TOTAL SATISFIED %	Neither satisfied nor dissatisfied %	Somewhat dissatisfied %	Very dissatisfied %	TOTAL DISSATISFIED %	Unsure %	Not applicable %
Bank	50	34	**84**	**11**	2	2	**4**	-	1
Mobile telephone provider	42	39	**81**	**12**	4	2	**5**	-	2
Internet provider	35	38	**73**	**13**	7	4	**10**	1	2
Electricity retailer	36	36	**73**	**18**	5	2	**6**	1	2
Insurance provider	29	36	**65**	**17**	4	2	**6**	1	11

Base: All respondents (n=1,200)

Satisfaction with providers – 2016

How satisfied are you with your provider of the following services? Please think about your main provider.

	Very satisfied %	Somewhat satisfied %	TOTAL SATISFIED %	Neither satisfied nor dissatisfied %	Somewhat dissatisfied %	Very dissatisfied %	TOTAL DISSATISFIED %	Unsure %	Not applicable %
Bank	43	39	**82**	**11**	4	2	**6**	-	-
Mobile telephone provider	34	40	**74**	**15**	7	2	**9**	-	2
Electricity retailer	32	37	**69**	**19**	7	2	**9**	2	2
Internet provider	30	39	**69**	**14**	11	4	**15**	-	2
Insurance provider	24	36	**60**	**20**	4	2	**6**	1	13

Base: All respondents (n=1,200)

Satisfaction with providers – 2015

How satisfied are you with your provider of the following services? Please think about your main provider.

	Very satisfied %	Somewhat satisfied %	TOTAL SATISFIED %	Neither satisfied nor dissatisfied %	Somewhat dissatisfied %	Very dissatisfied %	TOTAL DISSATISFIED %	Unsure %
Bank	47	37	**84**	**9**	4	2	**6**	-
Mobile telephone provider	37	42	**79**	**12**	4	2	**6**	-
Electricity retailer	32	40	**72**	**15**	5	2	**7**	2
Internet provider	31	40	**71**	**14**	10	3	**13**	-
Insurance provider	29	35	**64**	**18**	4	2	**6**	1

Base: All respondents (n=1200)

Reviewing provider – 2018

Do you think it is worthwhile reviewing your provider of the following services?				
	Base: n=	**Yes %**	**No %**	**Unsure %**
Internet provider	*1,174*	43	42	14
Electricity retailer	*1,177*	41	41	18
Insurance provider	*1,063*	40	43	18
Mobile telephone provider	*1,178*	38	50	12
Bank	*1,190*	30	58	12

Base: All; excludes 'not applicable'

Reviewing provider – 2016

Do you think it is worthwhile reviewing your provider of the following services?				
	Base: n=	**Yes %**	**No %**	**Unsure %**
Internet provider	*1,181*	43	46	12
Insurance provider	*1,046*	39	48	13
Electricity retailer	*1,173*	38	47	14
Mobile telephone provider	*1,179*	36	53	11
Bank	*1,200*	30	61	9

*Base: All; excludes 'not applicable'

Reviewing provider – 2015

Do you think it is worthwhile reviewing your provider of the following services?				
	Base: n=	**Yes %**	**No %**	**Unsure %**
Internet provider	*1177*	40	44	16
Electricity retailer	*1170*	37	43	20
Insurance provider	*1060*	34	47	19
Mobile telephone provider	*1167*	32	52	16
Bank	*1200*	25	61	14

*Base: All; excludes 'not applicable'

Shopping around – 2018

Do you think it is worthwhile to actively shop around for the best deal for your supplier of the following services?				
	Base: n=	**Yes %**	**No %**	**Unsure %**
Internet provider	*1,174*	67	22	11
Electricity retailer	*1,177*	66	21	13
Mobile telephone provider	*1,178*	63	27	10
Insurance provider	*1,063*	62	24	14
Bank	*1,190*	48	38	14

Base: All; excludes 'not applicable'

Shopping around – 2016

Do you think it is worthwhile to actively shop around for the best deal for your supplier of the following services?				
	Base: n=	**Yes %**	**No %**	**Unsure %**
Internet provider	*1,181*	67	24	9
Electricity retailer	*1,173*	66	25	10
Mobile telephone provider	*1,179*	65	27	8
Insurance provider	*1,046*	64	25	10
Bank	*1,200*	52	40	8

*Base: All; excludes 'not applicable'

Shopping around – 2015

Do you think it is worthwhile to actively shop around for the best deal for your supplier of the following services?				
	Base: n=	**Yes %**	**No %**	**Unsure %**
Internet provider	*1177*	67	23	11
Electricity retailer	*1170*	65	24	11
Insurance provider	*1060*	64	25	11
Mobile telephone provider	*1167*	61	29	10
Bank	*1200*	49	38	13

*Base: All; excludes 'not applicable'

Likelihood of switching – 2018

How likely are you to switch the following providers?									
	Base: n=	**Very likely %**	**Fairly likely %**	**TOTAL LIKELY %**	**Neither likely or unlikely %**	**Fairly unlikely %**	**Very unlikely %**	**TOTAL UNLIKELY %**	**Unsure %**
Internet provider	*1,174*	9	19	**28**	**21**	20	27	**47**	5
Electricity retailer	*1,177*	7	16	**23**	**22**	21	29	**49**	5
Insurance provider	*1,063*	6	15	**21**	**22**	23	29	**52**	5
Mobile telephone provider	*1,178*	7	13	**20**	**21**	22	33	**55**	4
Bank	*1,190*	5	9	**14**	**17**	20	46	**66**	3

Base: All; excludes 'not applicable'

Likelihood of switching – 2016

How likely are you to switch the following providers?									
	Base: n=	**Very likely %**	**Fairly likely %**	**TOTAL LIKELY %**	**Neither likely or unlikely %**	**Fairly unlikely %**	**Very unlikely %**	**TOTAL UNLIKELY %**	**Unsure %**
Internet provider	*1,181*	8	17	**25**	**23**	24	25	**49**	3
Electricity retailer	*1,173*	7	14	**21**	**26**	22	28	**50**	4
Mobile telephone provider	*1,179*	6	12	**18**	**24**	24	32	**56**	3
Insurance provider	*1,046*	4	12	**16**	**28**	25	27	**52**	4
Bank	*1,200*	3	8	**11**	**21**	23	43	**66**	2

*Base: All; excludes 'not applicable'

Likelihood of switching – 2015

How likely are you to switch the following providers?

	Base: n=	**Very likely %**	**Fairly likely %**	**TOTAL LIKELY %**	**Neither likely or unlikely %**	**Fairly unlikely %**	**Very unlikely %**	**TOTAL UNLIKELY %**	**Unsure %**
Internet provider	*1177*	8	17	**25**	**22**	20	27	**47**	6
Electricity retailer	*1170*	7	16	**23**	**23**	21	27	**48**	6
Mobile telephone provider	*1167*	5	12	**17**	**22**	25	32	**57**	5
Insurance provider	*1060*	3	14	**17**	**25**	22	29	**51**	7
Bank	*1200*	3	7	**10**	**18**	20	47	**67**	5

*Base: All; excludes ‘not applicable’

Decision maker – 2018

Are you the person that makes the decision about using the following suppliers or has input in that decision for your household?				
	Base: n=	***Yes %***	***No %***	***Unsure %***
Mobile telephone provider	*1,178*	92	4	3
Bank	*1,190*	92	5	3
Insurance provider	*1,063*	86	9	4
Internet provider	*1,174*	84	12	4
Electricity retailer	*1,177*	82	15	4

Base: All; excludes 'not applicable'

Decision maker – 2016

Are you the person that makes the decision about using the following suppliers or has input in that decision for your household?				
	Base: n=	***Yes %***	***No %***	***Unsure %***
Mobile telephone provider	*1,179*	92	6	2
Bank	*1,200*	92	6	2
Insurance provider	*1,046*	86	12	2
Internet provider	*1,181*	83	15	2
Electricity retailer	*1,173*	81	17	2

*Base: All; excludes 'not applicable'

Decision maker – 2015

Are you the person that makes the decision about using the following suppliers or has input in that decision for your household?				
	Base: n=	***Yes %***	***No %***	***Unsure %***
Mobile telephone provider	*1167*	90	6	4
Bank	*1200*	89	7	4
Insurance provider	*1060*	85	10	5
Internet provider	*1177*	84	12	4
Electricity retailer	*1170*	81	15	4

*Base: All; excludes 'not applicable'

Level of care about choice of supplier – 2018

Some people care a great deal about the household suppliers they choose, some don't care at all - how much do you care about the following suppliers you choose for your household?

	Base: n=	A lot %	A fair amount %	TOTAL A LOT + A FAIR AMOUNT %	Not that much %	Hardly at all %	TOTAL NOT THAT MUCH + HARDLY AT ALL %	Unsure %
Bank	*1,190*	49	35	**84**	11	3	**14**	2
Mobile telephone provider	*1,178*	38	40	**78**	17	3	**20**	2
Insurance provider	*1,063*	38	39	**77**	16	5	**20**	2
Internet provider	*1,174*	39	38	**77**	16	4	**20**	2
Electricity retailer	*1,177*	37	36	**73**	19	5	**24**	3

Base: All; excludes 'not applicable'

Level of care about choice of supplier – 2016

Some people care a great deal about the household suppliers they choose, some don't care at all - how much do you care about the following suppliers you choose for your household?

	Base: n=	A lot %	A fair amount %	TOTAL A LOT + A FAIR AMOUNT %	Not that much %	Hardly at all %	TOTAL NOT THAT MUCH + HARDLY AT ALL %	Unsure %
Bank	*1,200*	47	37	**84**	12	3	**15**	1
Internet provider	*1,181*	38	41	**79**	16	3	**19**	2
Mobile telephone provider	*1,179*	35	42	**77**	18	4	**22**	1
Insurance provider	*1,046*	37	39	**76**	18	4	**22**	2
Electricity retailer	*1,173*	36	38	**74**	19	5	**24**	2

*Base: All; excludes 'not applicable'

Level of care about choice of supplier – 2015

Some people care a great deal about the household suppliers they choose, some don't care at all - how much do you care about the following suppliers you choose for your household?

	Base: n=	A lot %	A fair amount %	TOTAL A LOT + A FAIR AMOUNT %	Not that much %	Hardly at all %	TOTAL NOT THAT MUCH + HARDLY AT ALL %	Unsure %
Bank	*1200*	47	36	**83**	11	3	**14**	2
Internet provider	*1177*	38	40	**78**	15	4	**19**	3
Mobile telephone provider	*1167*	35	43	**78**	15	4	**19**	2
Insurance provider	*1060*	39	38	**77**	15	5	**20**	3
Electricity retailer	*1170*	37	38	**75**	17	5	**22**	2

*Base: All; excludes 'not applicable'

Perceived ease of switching providers in different industries – 2018

How easy or difficult do you think it is to switch your provider of the following services?

	Base: n=	Very Easy %	Fairly Easy %	TOTAL EASY %	Neither easy or difficult %	Fairly difficult %	Very difficult %	TOTAL DIFFICULT %	Unsure %
Mobile telephone provider	*1,178*	34	38	**72**	14	7	2	**9**	5
Electricity retailer	*1,177*	29	36	**65**	15	10	4	**14**	7
Internet provider	*1,174*	24	37	**61**	16	13	4	**18**	5
Insurance provider	*1,063*	20	35	**55**	20	15	4	**19**	7
Bank	*1,190*	18	29	**46**	20	19	8	**27**	7

Base: All; excludes 'not applicable'

Perceived ease of switching providers in different industries – 2016

How easy or difficult do you think it is to switch your provider of the following services?

	Base: n=	Very Easy %	Fairly Easy %	TOTAL EASY %	Neither easy or difficult %	Fairly difficult %	Very difficult %	TOTAL DIFFICULT %	Unsure %
Mobile telephone provider	*1,179*	28	40	**68**	**17**	10	2	**12**	4
Electricity retailer	*1,173*	23	37	**60**	**19**	11	3	**14**	6
Insurance provider	*1,046*	17	37	**54**	**21**	16	4	**20**	6
Internet provider	*1,181*	17	36	**53**	**19**	17	5	**22**	5
Bank	*1,200*	13	32	**45**	**21**	21	7	**28**	6

*Base: All; excludes 'not applicable'

Perceived ease of switching providers in different industries – 2015

How easy or difficult do you think it is to switch your provider of the following services?

	Base: n=	Very Easy %	Fairly Easy %	TOTAL EASY %	Neither easy or difficult %	Fairly difficult %	Very difficult %	TOTAL DIFFICULT %	Unsure %
Mobile telephone provider	*1167*	27	40	**67**	**16**	9	2	**11**	6
Electricity retailer	*1170*	24	35	**59**	**18**	13	3	**16**	7
Internet provider	*1177*	19	33	**52**	**20**	17	5	**22**	7
Insurance provider	*1060*	18	33	**51**	**22**	14	5	**19**	8
Bank	*1200*	16	28	**44**	**19**	22	7	**29**	7

*Base: All; excludes 'not applicable'

11.3.3 View of retailer

Electricity retailer – 2018

How would you rate your electricity retailer on the following – using a 0 to 10 scale where 0 means very poor and 10 means excellent?

	0=Very poor												10=Excellent	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
Being well established	1	-	-	1	2	3	14	9	26	14	21	16	21	72
The payment solutions they offer	1	1	1	1	4	3	15	9	27	15	20	14	20	69
Overall quality of customer service	1	1	1	2	5	3	15	10	28	16	21	13	18	67
Overall value for money for the products and services	2	1	2	3	8	4	17	11	31	18	17	12	14	61
The electricity plans they offer	1	1	2	2	6	4	19	12	35	15	18	11	15	59

Base: All respondents (n=1,200)

Electricity retailer – 2016

How would you rate your electricity retailer on the following – using a 0 to 10 scale where 0 means very poor and 10 means excellent?

	0=Very poor												10=Excellent	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
Being well established	1	-	-	1	2	3	16	10	29	16	20	15	18	69
The payment solutions they offer	1	1	1	1	4	3	18	9	30	16	19	15	18	68
Overall quality of customer service	1	-	1	2	4	3	18	9	30	17	19	13	16	65
The electricity plans they offer	1	1	1	2	5	4	20	11	35	17	18	13	12	60
Overall value for money for the products and services	1	1	2	3	7	4	18	11	33	16	17	13	13	59

Base: All respondents (n=1,200)

Electricity retailer – 2015

How would you rate your electricity retailer on the following – using a 0 to 10 scale where 0 means very poor and 10 means excellent?														
	0=Very poor												10=Excellent	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
Being well established	1	1	1	1	**4**	2	15	9	**26**	16	17	19	17	**69**
The payment solutions they offer	2	1	1	2	**6**	3	14	10	**27**	16	17	16	19	**68**
Overall quality of customer service	2	1	2	3	**8**	4	16	10	**30**	16	18	15	14	**63**
The electricity plans they offer	2	1	2	4	**9**	4	19	12	**35**	17	15	12	13	**57**
Overall value for money for the products and services	3	1	3	4	**11**	4	17	11	**32**	15	16	13	12	**56**

Base: All respondents (n=1200)

Electricity options – 2018

When it comes to electricity options and offers available in your area, how confident are you about the following? Please use a scale of 0 to 10, where 0 means you are not at all confident and 10 means that you are extremely confident. How confident are you that …														
	0=Not at all confident												10=Extremely confident	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
You will choose the deal that is right for your household	2	-	1	2	**5**	4	12	9	**25**	16	21	12	21	**69**
You have all the information you need to compare the different offers	4	1	2	4	**11**	5	14	10	**30**	17	18	10	15	**60**

Base: All respondents (n=1,200)

Electricity options – 2016

When it comes to electricity options and offers available in your area, how confident are you about the following? Please use a scale of 0 to 10, where 0 means you are not at all confident and 10 means that you are extremely confident. How confident are you that …														
	0=Not at all confident												10=Extremely confident	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
You will choose the deal that is right for your household	2	-	1	1	**4**	3	14	10	**27**	16	17	14	20	**67**
You have all the information you need to compare the different offers	3	1	2	3	**9**	6	16	12	**34**	15	16	11	15	**57**

Base: All respondents (n=1,200)

Electricity options – 2015

When it comes to electricity options and offers available in your area, how confident are you about the following? Please use a scale of 0 to 10, where 0 means you are not at all confident and 10 means that you are extremely confident. How confident are you that …														
	0=Not at all confident												**10=Extremely confident**	
	0 %	**1 %**	**2 %**	**3 %**	**Total 0-3 %**	**4 %**	**5 %**	**6 %**	**Total 4-6 %**	**7 %**	**8 %**	**9 %**	**10 %**	**Total 7-10 %**
You will choose the deal that is right for your household	2	1	1	3	**7**	4	13	9	**26**	17	17	14	19	**67**
You have all the information you need to compare the different offers	3	2	3	5	**13**	6	15	11	**32**	16	14	11	14	**55**

Base: All respondents (n=1200)

11.3.4 Reviewing and shopping around

Approached by electricity retailers – 2018

How many different power companies have approached you about switching in the past two years?	All %
Base: n=	***1,200***
None	30
One	15
Two	24
Three or more	17
Unsure	14

Base: All respondents

Approached by electricity retailers – 2016

How many different power companies have approached you about switching in the past two years?	All %
Base: n=	***1,200***
None	33
One	18
Two	21
Three or more	18
Unsure	10

Base: All respondents.

Reviewing, shopping around, switching behaviour – 2018

In the past 12 months, have you…	*Base: n=*	Yes %	No %	Unsure %
Reviewed your current offer with your current electricity retailer to see if you were on an okay deal but didn't switch**	*1,045*	35	58	7
Actively investigated different offers or plans from other electricity retailers but didn't end up switching*	*989*	35	59	6
Switched electricity retailer	*1,200*	18	80	3
Switched the plan you were on with your existing retailer	*1,200*	13	81	6

*Base: Respondents who did not switch retailers (n=989)
**Base: Respondents who did not switch plan with existing retailer (n=1,045)
Base: All respondents (n=1,200)

Reviewing, shopping around, switching behaviour – 2016

In the past 12 months, have you…	*Base: n=*	Yes %	No %	Unsure %
Reviewed your current offer with your current electricity retailer to see if you were on an okay deal but didn't switch	*1,200*	36	58	6
Actively investigated different offers or plans from other electricity retailers but didn't end up switching*	*1,000*	30	65	5
Switched electricity retailer	*1,200*	17	80	3
Switched the plan you were on with your existing retailer	*1,200*	12	84	4

*Base: Respondents who did not switch retailers (n=1,000)
Base: All respondents (n=1,200)

Reviewing, shopping around, switching behaviour – 2015

In the past 12 months, have you…	*Base: n=*	Yes %	No %	Unsure %
Actively investigated different offers or plans from other electricity retailers but didn't end up switching*	*963*	36	58	7
Reviewed your current offer with your current electricity retailer to see if you were on an okay deal but didn't switch	*1200*	34	58	8
Switched electricity retailer	*1200*	20	75	6
Switched the plan you were on with your existing retailer	*1200*	11	81	7

*Base: Respondents who did not switch retailers (n=963)
Base: All respondents (n=1200)

Information used in decision making – 2018

Reviewing

	When reviewing your current electricity deal or investigating different electricity offers and plans what information sources did you use?*	***Thinking about the information sources you used when investigating different retailers or plans, which one was most useful in helping with your decision whether or not to switch?***
Base: n=	***390***	***390***
Price comparison website	50.9	34.2
Looked at price/best price/saving	40.4	10.8
Retailer website	33.9	11.0
Google/general internet search	31.2	10.0
Received a call from a sales person	21.3	5.1
Door-to-door sales person visiting the home	18.5	6.2
A friend or family member	18.4	5.2
Phoned the retailer	13.0	5.6
General advertising e.g. TV, Radio, Newspaper advertisement	11.9	1.5
Brochures/flyers and other direct mail	9.8	1.8
Media article/advertisement segment	6.7	0.5
Outdoor advertising e.g. billboards, buses	2.1	0.5
Community support organisation	1.8	0.5
Financial counsellor	1.0	0.5
Other	2.3	1.8
Unsure	2.1	2.1
None of them were useful	2.6	2.6

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan.
*Note: Multiple response question

Information used in decision making – 2016

Reviewing	*When reviewing your current electricity deal or investigating different electricity offers and plans what information sources did you use?**	*Thinking about the information sources you used when investigating different retailers or plans, which one was most useful in helping with your decision whether or not to switch?*
Base: n=	***372***	***372***
Price comparison website	55.4	35.0
Google/general internet search	42.7	11.7
Retailer website	38.5	9.8
Looked at price/best price/saving	28.0	8.3
Door-to-door sales person visiting the home	23.7	7.4
Received a call from a sales person	22.0	5.7
Brochures/flyers and other direct mail	21.3	4.6
A friend or family member	18.4	2.7
Phoned the retailer	14.6	6.7
General advertising e.g. TV, Radio, Newspaper advertisement	13.5	1.9
Media article/advertisement segment	4.6	-
Outdoor advertising e.g. billboards, buses	2.3	-
Community support organisation	1.3	0.5
Financial counsellor	0.6	0.3
Other	2.6	1.9
Unsure	2.0	2.0
None of them were useful	1.6	1.6

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan.
*Note: Multiple response question

Information used in decision making – 2015

Reviewing	*When reviewing your current electricity deal or investigating different electricity offers and plans what information sources did you use?**	*Thinking about the information sources you used when investigating different retailers or plans, which one was most useful in helping with your decision whether or not to switch?*
Base: n=	***388***	***388***
Price comparison website	55.7	38.6
Google/general internet search	45.0	12.5
Retailer website	35.8	8.9
Looked at price/best price/saving	29.8	8.3
Brochures/flyers and other direct mail	23.4	4.0
Received a call from a sales person	23.0	6.8
Door-to-door sales person visiting the home	17.8	5.6
A friend or family member	17.8	3.6
General advertising e.g. TV, Radio, Newspaper advertisement	11.7	1.2
Phones retailer	9.5	3.5
Media article/advertisement segment	5.1	0.2
None of them were useful	3.1	2.0
Outdoor advertising e.g. billboards, buses	1.8	-
Community support organisation	1.5	0.6
Financial counsellor	-	-
Unsure	2.3	2.3
Other	3.4	1.9

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan.
*Note: Multiple response question

Action taken after review – 2018

Did you take any action after reviewing this information?	
	%
Base: n=	***390***
Yes	19
No	76
Unsure	4

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan

Action taken after review – 2016

Did you actually take any action after reviewing this information?	
	%
Base: n=	***372***
Yes	10
No	88
Unsure	2

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan.

Action taken after review – 2015

Did you actually take any action after reviewing this information?	
	%
Base: n=	***388***
Yes	19
No	77
Unsure	4

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan.

Switching factors – by those who reviewed or actively investigated – 2018

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	0=Not at all important												10=Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The price per kilowatt hour (kWh)	-	-	-	-	**1**	1	2	5	**7**	9	19	19	46	**92**
The discounts offered	-	-	-	1	**1**	1	4	3	**8**	10	21	19	41	**91**
Type of plan that matches your daily usage	1	-	-	-	**2**	1	7	4	**12**	10	25	17	34	**86**
The terms and conditions of the contract	1	1	-	2	**3**	1	4	5	**11**	14	19	15	37	**86**
The plans available to you in your area	1	1	1	-	**3**	1	6	5	**12**	12	23	15	35	**85**
Whether the price per kilowatt hour (kWh) can change during the contract	1	1	-	1	**2**	1	4	9	**14**	11	18	15	40	**84**
The estimated total electricity bill amount	1	-	1	1	**3**	2	6	6	**14**	12	17	15	39	**83**
The length of the contract	2	1	1	-	**5**	2	7	5	**14**	14	19	15	33	**81**
Whether you are locked into a contract	2	1	1	1	**5**	2	8	7	**17**	12	17	15	34	**78**
The amount you would have to pay to exit your contract early (exit or termination fee)	5	1	1	2	**9**	3	7	6	**16**	9	16	13	37	**75**
Brand and reputation of the company	3	-	1	2	**6**	2	10	10	**21**	16	21	14	22	**73**
The amount of electricity you used in the last year	3	1	1	3	**7**	3	11	10	**23**	14	20	12	23	**69**
Whether the company is sustainable	4	1	2	1	**8**	3	13	10	**26**	15	19	10	23	**67**
Whether the company is innovative	7	1	2	5	**15**	5	18	15	**38**	13	16	6	12	**47**
Whether the company is partly owned by the Government	18	3	4	7	**33**	7	19	11	**37**	9	10	4	8	**31**

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan (n=390)

Switching factors – by those who reviewed or actively investigated – 2016

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	0=Not at all important												10=Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The price per kilowatt hour (kWh)	-	-	-	-	**-**	2	3	5	**10**	9	16	19	45	**89**
The discounts offered	-	-	-	1	**1**	1	4	5	**10**	9	19	21	40	**89**
Type of plan that matches your daily usage	-	-	-	-	**-**	1	6	4	**11**	16	20	18	34	**88**
The estimated total electricity bill amount	1	-	-	1	**2**	1	5	5	**11**	10	18	21	37	**86**
The terms and conditions of the contract	-	-	-	2	**2**	1	6	7	**14**	13	19	18	34	**84**
Whether the price per kilowatt hour (kWh) can change during the contract	1	-	-	1	**2**	1	6	7	**14**	13	16	19	35	**83**
The plans available to you in your area	1	-	-	-	**1**	2	7	7	**16**	14	20	19	30	**83**
Whether you are locked into a contract	1	1	1	1	**4**	2	7	8	**17**	11	19	18	33	**81**
The length of the contract	2	1	-	1	**4**	1	9	7	**17**	13	21	19	25	**78**
The amount you would have to pay to exit your contract early (exit or termination fee)	2	1	1	2	**6**	2	10	7	**19**	9	16	15	34	**74**
The amount of electricity you used in the last year	2	1	-	2	**5**	3	11	10	**24**	19	18	12	21	**70**
Brand and reputation of the company	2	-	1	3	**6**	2	13	13	**28**	14	16	15	22	**67**
Whether the company is sustainable	4	1	2	2	**9**	3	15	9	**27**	12	16	14	23	**65**
Whether the company is innovative	6	1	2	5	**14**	6	21	11	**38**	13	14	10	10	**47**
Whether the company is partly owned by the Government	15	4	7	6	**32**	8	22	7	**37**	8	10	7	8	**33**

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan (n=372)

Switching factors – by those who reviewed or actively investigated – 2015

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	Not at all important											Extremely important		
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The price per kilowatt hour (kWh)	-	-	1	1	**2**	1	3	3	**7**	10	17	22	43	**92**
The estimated total electricity bill amount	1	1	-	-	**2**	1	6	3	**10**	13	16	20	39	**88**
The discounts offered	1	-	-	-	**1**	1	4	5	**10**	8	17	26	37	**88**
Type of plan that matches your daily usage	-	-	-	-	**-**	1	5	6	**12**	13	23	20	32	**88**
Whether the price per kilowatt hour (kWh) can change during the contract	1	-	-	1	**2**	1	6	6	**13**	10	20	21	35	**86**
The terms and conditions of the contract	1	-	-	1	**2**	2	5	7	**14**	12	20	23	30	**85**
The plans available to you in your area	-	-	-	1	**1**	3	6	6	**15**	14	19	20	31	**84**
The amount you would have to pay to exit your contract early (exit or termination fee)	3	-	1	3	**7**	2	8	6	**16**	11	16	17	35	**79**
The length of the contract	1	1	1	1	**4**	2	8	7	**17**	15	16	18	29	**78**
Whether you are locked into a contract	2	-	2	1	**5**	2	10	6	**18**	13	12	21	31	**77**
The amount of electricity you used in the last year	1	-	1	2	**4**	3	12	10	**25**	16	19	14	21	**70**
Whether the company is sustainable	2	1	2	3	**8**	2	13	9	**24**	17	18	14	19	**68**
Brand and reputation of the company	3	2	3	3	**11**	4	9	12	**25**	18	13	16	17	**64**
Whether the company is innovative	6	2	3	5	**16**	5	20	15	**40**	12	13	9	9	**43**
Whether the company is partly owned by the Government	16	4	5	8	**33**	7	23	11	**41**	6	5	8	7	**26**

Base: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailers or change their plan (n=388)

11.3.5 Switchers

Information used in decision making – 2018

Switching		
	The last time you changed your electricity retailer or plan, which of the following information sources did you use to help with your decision?*	***Thinking about the information sources you used when changing your electricity retailer or plan, which one was most useful in helping with your decision to switch?***
Base: n=	***309***	***309***
Looked at price/best price/saving	40.9	13.1
Price comparison website	38.5	18.9
Google/general internet search	33.0	10.0
Retailer website	29.5	8.1
A friend or family member	21.7	7.5
Phoned the retailer	21.4	12.3
Received a call from a sales person	14.0	9.5
Door-to-door sales person visiting the home	12.8	7.7
General advertising e.g. TV, Radio, Newspaper advertisement	11.0	2.3
Brochures/flyers and other direct mail	6.7	0.7
Media article/advertisement segment	4.1	-
Community support organisation	2.9	0.3
Outdoor advertising e.g. billboards, buses	2.9	-
Financial counsellor	1.6	0.3
Other	3.2	1.9
Unsure	2.5	2.5
Did not use any information sources	4.9	4.9

Base: Respondents who switched electricity retailer and/or switched the current electricity plan
*Note: Multiple response question

Information used in decision making – 2016

Switching

	*The last time you changed your electricity retailer or plan, which of the following information sources did you use to help with your decision?**	*Thinking about the information sources you used when changing your electricity retailer or plan, which one was most useful in helping with your decision to switch?*
Base: n=	***282***	***282***
Price comparison website	39.9	20.8
Google/general internet search	32.5	8.6
Looked at price/best price/saving	28.8	10.8
Retailer website	27.1	7.7
Received a call from a sales person	19.9	12.9
Phoned the retailer	18.8	8.3
Door-to-door sales person visiting the home	14.2	9.0
A friend or family member	13.9	4.7
Brochures/flyers and other direct mail	8.9	2.6
General advertising e.g. TV, Radio, Newspaper advertisement	8.5	2.5
Media article/advertisement segment	3.1	0.4
Outdoor advertising e.g. billboards, buses	1.4	0.3
Community support organisation	1.4	0.4
Financial counsellor	0.3	0.3
Other	6.2	5.8
Unsure	1.7	1.7
Did not use any information sources	3.3	3.3

Base: Respondents who switched electricity retailer and/or switched the current electricity plan.
*Note: Multiple response question

	*The last time you changed your electricity retailer or plan, which of the following information sources did you use to help with your decision?**	*Thinking about the information sources you used when changing your electricity retailer or plan, which one was most useful in helping with your decision to switch?*
Base: n=	***319***	***319***
Price comparison website	35.3	17.6
Phoned the retailer	28.6	17.9
Google/general internet search	25.9	6.3
Looked at price/best price/saving	25.9	9.0
Retailer website	24.7	5.5
A friend or family member	17.2	6.5
Door-to-door sales person visiting the home	15.5	11.0
Received a call from a sales person	15.5	9.1
General advertising e.g. TV, Radio, Newspaper advertisement	10.5	2.6
Brochures/flyers and other direct mail	10.3	3.4
Did not use any information sources	8.9	5.1
Media article/advertisement segment	3.7	0.5
Community support organisation	3.2	1.3
Outdoor advertising e.g. billboards, buses	2.8	-
Financial counsellor	2.2	0.8
Unsure	2.0	1.6
Other	4.4	2.0

Base: Respondents who switched electricity retailer and/or switched the current electricity plan.
*Note: Multiple response question

Switching factors – by switchers – 2018

For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?

	0=Not at all important												10=Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The estimated total electricity bill amount	1	-	1	1	**4**	2	6	5	**12**	15	16	17	36	**84**
The discounts offered	2	-	-	-	**3**	2	6	6	**13**	13	18	18	36	**84**
The price per kilowatt hour (kWh)	1	1	1	1	**4**	2	8	7	**16**	9	16	17	37	**80**
Type of plan that matches your daily usage	2	-	-	1	**4**	2	9	9	**19**	13	22	15	26	**77**
Whether the price per kilowatt hour (kWh) can change during the contract	3	-	1	2	**5**	2	10	8	**20**	13	18	15	29	**75**
The terms and conditions of the contract	3	-	1	2	**6**	3	10	9	**22**	12	21	14	25	**73**
The plans available to you in your area	4	-	1	2	**7**	3	10	10	**23**	10	21	12	27	**70**
The length of the contract	6	-	1	2	**9**	2	12	7	**21**	14	18	14	24	**70**
Whether you are locked into a contract	6	-	2	3	**11**	3	11	9	**23**	9	16	11	29	**66**
Brand and reputation of the company	6	-	2	4	**12**	3	10	12	**26**	16	23	8	15	**62**
The amount you would have to pay to exit your contract early (exit or termination fee)	9	1	4	2	**15**	3	13	7	**23**	11	12	9	29	**61**
Whether the company is sustainable	6	1	4	2	**13**	5	13	10	**28**	14	17	9	18	**59**
The amount of electricity you used in the last year	7	1	2	3	**13**	5	13	10	**28**	18	15	11	16	**59**
Whether the company is innovative	9	2	5	7	**23**	4	18	13	**36**	16	9	10	7	**41**
Whether the company is partly owned by the Government	25	4	7	5	**40**	6	18	7	**31**	10	7	5	6	**29**

Base: Respondents who switched electricity retailer and/or switched the current electricity plan (n=309)

Switching factors – by switchers – 2016

For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?

	0=Not at all important												10=Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The price per kilowatt hour (kWh)	1	-	1	1	**3**	2	5	6	**13**	13	20	18	34	**85**
The discounts offered	1	-	-	-	**1**	3	8	3	**14**	14	21	20	30	**85**
The estimated total electricity bill amount	2	-	2	2	**6**	2	5	6	**13**	14	18	20	28	**80**
Type of plan that matches your daily usage	1	-	1	1	**3**	2	8	8	**18**	14	21	22	21	**78**
Whether the price per kilowatt hour (kWh) can change during the contract	2	1	1	1	**5**	4	11	9	**24**	15	19	15	23	**72**
The plans available to you in your area	2	1	-	1	**4**	4	8	11	**23**	16	18	15	23	**72**
The terms and conditions of the contract	3	1	1	1	**6**	4	10	8	**22**	18	15	15	22	**70**
Whether you are locked into a contract	3	2	1	1	**7**	1	11	9	**21**	11	20	14	24	**69**
The length of the contract	4	1	2	1	**8**	5	10	8	**23**	14	20	13	21	**68**
The amount you would have to pay to exit your contract early (exit or termination fee)	7	2	3	2	**14**	4	13	8	**25**	11	16	11	23	**61**
The amount of electricity you used in the last year	4	1	1	2	**8**	6	15	12	**33**	13	18	11	16	**58**
Whether the company is sustainable	5	1	4	5	**15**	6	12	9	**27**	17	15	11	14	**57**
Brand and reputation of the company	5	2	3	2	**12**	5	17	10	**32**	16	16	12	11	**55**
Whether the company is innovative	8	2	4	4	**18**	11	19	11	**41**	11	14	7	10	**42**
Whether the company is partly owned by the Government	21	5	5	5	**36**	8	18	9	**35**	10	7	5	6	**28**

Base: Respondents who switched electricity retailer and/or switched the current electricity plan (n=282).

Switching factors – by switchers – 2015

For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?

	Not at all important												Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The price per kilowatt hour (kWh)	3	-	1	2	**6**	1	9	7	**17**	13	17	15	33	**78**
The discounts offered	2	1	1	1	**5**	1	8	8	**17**	11	17	17	32	**77**
The estimated total electricity bill amount	3	-	-	1	**4**	2	11	7	**20**	14	16	16	29	**75**
Type of plan that matches your daily usage	2	1	1	1	**5**	2	12	8	**22**	13	20	15	26	**74**
The plans available to you in your area	2	1	-	2	**5**	3	14	9	**26**	15	19	14	22	**70**
Whether the price per kilowatt hour (kWh) can change during the contract	2	2	2	1	**7**	3	16	8	**27**	14	16	12	25	**67**
Whether you are locked into a contract	4	1	2	2	**9**	4	14	9	**27**	12	15	12	24	**63**
The amount you would have to pay to exit your contract early (exit or termination fee)	8	2	1	3	**14**	5	12	8	**25**	10	16	13	23	**62**
The length of the contract	5	2	1	4	**12**	3	14	11	**28**	12	13	15	21	**61**
The terms and conditions of the contract	3	1	2	3	**9**	4	16	11	**31**	10	13	12	24	**59**
Brand and reputation of the company	5	-	2	3	**10**	5	17	10	**32**	16	18	10	15	**59**
The amount of electricity you used in the last year	8	1	1	4	**14**	2	18	8	**28**	15	15	12	16	**58**
Whether the company is sustainable	9	2	2	3	**16**	7	20	9	**36**	12	10	11	16	**49**
Whether the company is innovative	11	4	3	5	**23**	5	22	13	**40**	12	9	5	10	**36**
Whether the company is partly owned by the Government	26	6	5	6	**43**	7	21	8	**36**	9	4	2	5	**20**

Base: Respondents who switched electricity retailer and/or switched the current electricity plan (n=319)

11.3.6 Non-switchers

Switching factors – by non-switchers – 2018

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	0=Not at all important												10=Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The discounts offered	3	-	-	1	**4**	2	10	3	**15**	13	17	16	34	**81**
The price per kilowatt hour (kWh)	4	-	1	1	**5**	2	11	4	**18**	11	16	16	35	**77**
Type of plan that matches your daily usage	3	-	-	-	**3**	3	13	6	**21**	13	17	17	28	**75**
The estimated total electricity bill amount	3	1	-	-	**4**	2	13	5	**20**	11	16	16	32	**75**
The terms and conditions of the contract	3	-	1	1	**5**	2	12	6	**21**	14	17	14	30	**74**
The plans available to you in your area	4	-	1	1	**6**	2	14	5	**22**	14	18	14	26	**72**
Whether you are locked into a contract	3	-	-	1	**5**	3	14	7	**24**	12	17	14	29	**71**
Whether the price per kilowatt hour (kWh) can change during the contract	5	-	1	1	**6**	2	14	8	**24**	10	17	14	28	**70**
Brand and reputation of the company	4	1	-	1	**6**	5	13	8	**26**	14	18	15	21	**68**
The amount you would have to pay to exit your contract early (exit or termination fee)	5	1	-	1	**7**	2	14	9	**25**	9	14	12	32	**68**
The length of the contract	5	-	1	2	**9**	3	14	8	**24**	14	14	12	27	**67**
Whether the company is sustainable	4	1	1	3	**9**	3	16	10	**30**	12	13	15	22	**62**
The amount of electricity you used in the last year	6	1	1	1	**9**	4	18	9	**31**	15	13	14	17	**60**
Whether the company is innovative	7	1	2	3	**14**	4	25	12	**40**	15	13	8	10	**46**
Whether the company is partly owned by the Government	16	3	3	5	**26**	6	22	11	**40**	13	8	5	8	**33**

Base: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan (n=501)

Switching factors – by non-switchers – 2016

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?															
	0=Not at all important												**10=Extremely important**		
	0 %	**1 %**	**2 %**	**3 %**	**Total 0-3 %**	**4 %**	**5 %**	**6 %**	**Total 4-6 %**	**7 %**	**8 %**	**9 %**	**10 %**	**Total 7-10 %**
The price per kilowatt hour (kWh)	3	-	-	-	**3**	2	12	5	**19**	11	18	15	33	**77**
The discounts offered	2	-	-	-	**2**	1	14	4	**19**	12	17	19	29	**77**
Type of plan that matches your daily usage	2	-	-	-	**2**	2	14	6	**22**	15	19	17	25	**76**
The estimated total electricity bill amount	3	1	-	1	**5**	2	15	4	**21**	11	19	16	28	**74**
Whether the price per kilowatt hour (kWh) can change during the contract	2	-	-	-	**2**	3	16	7	**26**	12	20	15	25	**72**
The terms and conditions of the contract	2	1	-	1	**4**	1	15	7	**23**	15	18	12	27	**72**
Whether you are locked into a contract	2	-	-	1	**3**	3	16	5	**24**	14	16	13	28	**71**
The amount you would have to pay to exit your contract early (exit or termination fee)	3	-	-	1	**4**	2	18	6	**26**	13	16	13	28	**70**
The plans available to you in your area	3	1	-	1	**5**	2	16	7	**25**	13	19	15	23	**70**
The length of the contract	3	1	1	1	**6**	2	19	7	**28**	11	19	14	22	**66**
The amount of electricity you used in the last year	4	1	1	2	**8**	3	20	10	**33**	16	18	10	16	**60**
Brand and reputation of the company	3	1	1	2	**7**	3	20	11	**34**	12	18	14	16	**60**
Whether the company is sustainable	3	-	1	2	**6**	3	20	10	**33**	14	15	12	19	**60**
Whether the company is innovative	6	2	3	3	**14**	7	26	12	**45**	12	12	7	10	**41**
Whether the company is partly owned by the Government	11	3	3	4	**21**	7	31	10	**48**	10	8	4	7	**29**

Base: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan (n=546).

Switching factors – by non-switchers – 2015

If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	Not at all important											Extremely important	
	0 %	1 %	2 %	3 %	Total 0-3 %	4 %	5 %	6 %	Total 4-6 %	7 %	8 %	9 %	10 %	Total 7-10 %
The price per kilowatt hour (kWh)	3	-	1	-	**4**	3	9	6	**18**	10	17	17	35	**79**
Type of plan that matches your daily usage	2	-	-	-	**2**	2	10	7	**19**	15	19	16	29	**79**
The estimated total electricity bill amount	3	-	-	1	**4**	2	9	7	**18**	12	16	17	33	**78**
The discounts offered	2	-	-	-	**2**	2	8	7	**17**	12	16	18	32	**78**
Whether the price per kilowatt hour (kWh) can change during the contract	2	-	-	1	**3**	2	11	8	**21**	13	19	18	25	**75**
The plans available to you in your area	2	-	1	1	**4**	2	12	10	**24**	15	16	17	25	**73**
The terms and conditions of the contract	3	-	1	1	**5**	3	11	9	**23**	15	16	14	28	**73**
The amount you would have to pay to exit your contract early (exit or termination fee)	4	1	1	2	**8**	3	11	9	**23**	12	13	14	32	**71**
Whether you are locked into a contract	3	1	1	1	**6**	4	13	9	**26**	10	14	15	30	**69**
The length of the contract	3	1	1	1	**6**	3	13	9	**25**	13	16	14	24	**67**
Brand and reputation of the company	3	1	1	2	**7**	3	15	11	**29**	16	16	14	19	**65**
The amount of electricity you used in the last year	4	1	1	3	**9**	2	17	13	**32**	16	16	12	17	**61**
Whether the company is sustainable	4	1	1	3	**9**	4	17	10	**31**	14	15	11	21	**61**
Whether the company is innovative	6	2	3	4	**15**	6	21	14	**41**	13	12	8	11	**44**
Whether the company is partly owned by the Government	15	3	6	6	**30**	7	23	10	**40**	10	6	6	9	**31**

Base: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan. (n=432)

11.3.7 Summary of switching factors

Comparison of switching factors – 2018

Switchers: For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?
Reviewers and did not review or switch: If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	Switchers TOTAL IMPORTANT (7-10) %	Reviewers TOTAL IMPORTANT (7-10) %	Did not switch or review TOTAL IMPORTANT (7-10) %
Base: n=	309	390	501
The discounts offered	84	91	81
The estimated total electricity bill amount	84	83	75
The price per kilowatt hour (kWh)	80	92	77
Type of plan that matches your daily usage	77	86	75
Whether the price per kilowatt hour (kWh) can change during the contract	75	84	70
The terms and conditions of the contract	73	86	74
The length of the contract	70	81	67
The plans available to you in your area	70	85	72
Whether you are locked into a contract	66	78	71
Brand and reputation of the company	62	73	68
The amount you would have to pay to exit your contract early (exit or termination fee)	61	75	68
The amount of electricity you used in the last year	59	69	60
Whether the company is sustainable	59	67	62
Whether the company is innovative	41	47	46
Whether the company is partly owned by the Government	29	31	33

Base:
For switchers: Respondents who switched electricity retailer and/or switched the current electricity plan
For reviewers: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailer or change their plan
For respondents who did not review or switch: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan

Comparison of switching factors – 2016

Switchers: For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?
Reviewers and did not review or switch: If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	Switchers TOTAL IMPORTANT (7-10) %	Reviewers TOTAL IMPORTANT (7-10) %	Did not switch or review TOTAL IMPORTANT (7-10) %
Base: n=	***282***	***372***	***546***
The price per kilowatt hour (kWh)	85	89	77
The discounts offered	85	89	77
The estimated total electricity bill amount	80	86	74
Type of plan that matches your daily usage	78	88	76
Whether the price per kilowatt hour (kWh) can change during the contract	72	83	72
The plans available to you in your area	72	83	70
The terms and conditions of the contract	70	84	72
Whether you are locked into a contract	69	81	71
The length of the contract	68	78	66
The amount you would have to pay to exit your contract early (exit or termination fee)	61	74	70
The amount of electricity you used in the last year	58	70	60
Whether the company is sustainable	57	65	60
Brand and reputation of the company	55	67	60
Whether the company is innovative	42	47	41
Whether the company is partly owned by the Government	28	33	29

Base:
For switchers: Respondents who switched electricity retailer and/or switched the current electricity plan or reviewed their plan or actively investigated different offers or plans.

For reviewers: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailer or change their plan.
For respondents who did not review or switch: Respondents who did not review current offer, investigate different offers or plans, switch electricity retailer or switch current plan.

Comparison of switching factors – 2015

Switchers: For each of these factors please rate how important it was in your decision to switch your electricity retailer or plan where 0 means not at all important and 10 means extremely important?
Reviewers and did not review or switch: If you were going to switch electricity provider or change your plan, please rate how important each of these factors would be, where 0 means not at all important and 10 means extremely important?

	Switchers TOTAL IMPORTANT (7-10) %	Reviewers TOTAL IMPORTANT (7-10) %	Did not switch or review TOTAL IMPORTANT (7-10) %
Base: n=	***319***	***388***	***432***
The price per kilowatt hour (kWh)	**78**	**92**	**79**
The discounts offered	**77**	**88**	**78**
The estimated total electricity bill amount	**75**	**88**	**78**
Type of plan that matches your daily usage	**74**	**88**	**79**
The plans available to you in your area	**70**	**84**	**73**
Whether the price per kilowatt hour (kWh) can change during the contract	**67**	**86**	**75**
Whether you are locked into a contract	**63**	**77**	**69**
The amount you would have to pay to exit your contract early (exit or termination fee)	**62**	**79**	**71**
The length of the contract	**61**	**78**	**67**
The terms and conditions of the contract	**59**	**85**	**73**
Brand and reputation of the company	**59**	**64**	**65**
The amount of electricity you used in the last year	**58**	**70**	**61**
Whether the company is sustainable	**49**	**68**	**61**
Whether the company is innovative	**36**	**43**	**44**
Whether the company is partly owned by the Government	**20**	**26**	**31**

Base:
For switchers: Respondents who switched electricity retailer and/or switched the current electricity plan or reviewed their plan or actively investigated different offers or plans.
For reviewers: Respondents who reviewed current offer or actively investigated different offers or plans but did not switch retailer or change their plan.

For respondents who did not review or switch: Respondents who did not review current offer, investigate different offers, switch electricity retailer or current plan.

Savings needed to consider switching electricity company or plan – 2018

What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?	
	All ***%***
Base: n=	***1200***
Less than $100	8
$100 but less than $150	15
$150 but less than $200	17
$200 but less than $250	11
$250 or more	30
Unsure	19

Base: All respondents

Savings needed to consider switching electricity company or plan – 2016

What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?	
	All ***%***
Base: n=	***1200***
Less than $100	6
$100 but less than $150	16
$150 but less than $200	15
$200 but less than $250	12
$250 or more	31
Unsure	19

Base: All respondents

Savings needed to consider switching electricity company or plan – 2015

What is the minimum amount of money you would need to save annually on your electricity bill in order to seriously consider changing your company or plan?	
	All ***%***
Base: n=	***1200***
Less than $100	8
$100 but less than $150	14
$150 but less than $200	15
$200 but less than $250	14
$250 or more	30
Unsure	19

Base: All respondents

11.3.8 Information usage and needs

Information used for comparing electricity retailers – 2018

What information would you look for when comparing electricity retailer options or plans? Please choose your preferred options from the list below and add any information that is not on this list.

	All %
Base: n=	***1,200***
The electricity rate (price per kilowatt hour)	71.5
Size of the monthly bill payment amount	63.5
Type of rate such as fixed or variable rate	54.6
Length of the contract	54.5
Size of the initial discount	51.0
Early termination or exit fee	45.0
Other	4.1
Unsure	7.5

Base: All respondents
Note: Multiple response question

Information used for comparing electricity retailers – 2016

What information would you look for when comparing electricity retailer options or plans? Please choose your preferred options from the list below and add any information that is not on this list.

	All %
Base: n=	***1,200***
The electricity rate (price per kilowatt hour)	76.7
Size of the monthly bill payment amount	60.9
Size of the initial discount	55.3
Length of the contract	53.4
Type of rate such as fixed or variable rate	51.2
Early termination or exit fee	44.2
Other	6.6
Unsure	5.3

Base: All respondents.
Note: Multiple response question

Information used for comparing electricity retailers – 2015

What information would you look for when comparing electricity retailer options or plans? Please choose your preferred options from the list below and add any information that is not on this list.

	All %
Base: n=	***1200***
The electricity rate (price per kilowatt hour)	80.3
Size of the monthly bill payment amount	63.8
Size of the initial discount	57.2
Length of the contract	54.9
Type of rate such as fixed or variable rate	52.7
Early termination or exit fee	46.3
Other	6.1
Unsure	5.9

Base: All respondents.
Note: Multiple response question

Preferred method of accessing information – 2018

Where or who would you prefer to get your information from? Please choose your preferred options from the list below and add any that are not on this list.

	All *%*
Base: n=	***1,200***
Price comparison website	60.8
Electricity retailer	54.8
General advertising	14.4
Media	9.1
Community support organisation	8.9
Financial counsellor	4.8
Broker	3.0
Other	2.9
Unsure	10.8

Base: All respondents
Note: Multiple response question

Preferred method of accessing information – 2016

Where or who would you prefer to get your information from? Please choose your preferred options from the list below and add any that are not on this list.	
	All ***%***
Base: n=	***1,200***
Electricity retailer	63.1
Price comparison website	61.3
General advertising	14.0
Media	9.2
Community support organisation	7.9
Financial counsellor	3.0
Broker	2.7
Other	5.2
Unsure	6.5

Base: All respondents
Note: Multiple response question

Preferred method of accessing information – 2015

Where or who would you prefer to get your information from? Please choose your preferred options from the list below and add any that are not on this list.	
	All ***%***
Base: n=	***1200***
Price comparison website	62.5
Electricity retailer	62.2
General advertising	15.8
Media	10.1
Community support organisation	8.5
Broker	4.3
Financial counsellor	3.4
Other	4.8
Unsure	7.9

Base: All respondents
Note: Multiple response question

Best way to access information – 2018

What would be the best way to get this information to you? Please choose your preferred options from list below and add any that are not on this list.	
	All ***%***
Base: n=	***1200***
Websites	62.0
By email	44.0
0800 number	18.9
Advertising	15.1
Pamphlets	12.8
Other	2.0
Unsure	6.8

Base: All respondents
Note: Multiple response question

Best way to access information – 2016

What would be the best way to get this information to you? Please choose your preferred options from list below and add any that are not on this list.	
	All ***%***
Base: n=	***1200***
Websites	66.8
By email	42.3
0800 number	16.8
Advertising	16.0
Pamphlets	13.9
Other	2.8
Unsure	4.8

Base: All respondents
Note: Multiple response question

Best way to access information – 2015

What would be the best way to get this information to you? Please choose your preferred options from list below and add any that are not on this list.	
	All ***%***
Base: n=	***1200***
Websites	69.3
By email	47.7
0800 number	20.6
Advertising	19.3
Pamphlets	17.5
Other	1.7
Unsure	4.9

Base: All respondents
Note: Multiple response question

Ease of comparing different offers – 2018

How difficult is it for you to compare the different offers when deciding whether or not to switch your supplier of the following services?

	Very easy %	Fairly easy %	TOTAL EASY %	Neither easy or difficult %	Fairly difficult %	Very difficult %	TOTAL DIFFICULT %	Unsure %	Not applicable %
Mobile telephone provider	24	38	**61**	**22**	7	2	**8**	3	4
Internet provider	20	37	**57**	**23**	8	3	**12**	4	4
Electricity retailer	17	35	**52**	**24**	11	4	**15**	5	4
Bank	18	31	**49**	**25**	12	4	**16**	5	5
Insurance provider	12	27	**39**	**25**	15	5	**21**	6	9

Base: All respondents (n=1,200)

Ease of comparing different offers – 2016

How difficult is it for you to compare the different offers when deciding whether or not to switch your supplier of the following services?

	Very easy %	Fairly easy %	TOTAL EASY %	Neither easy or difficult %	Fairly difficult %	Very difficult %	TOTAL DIFFICULT %	Unsure %	Not applicable %
Mobile telephone provider	21	39	**60**	**23**	9	2	**11**	3	3
Internet provider	17	38	**55**	**26**	11	3	**14**	3	2
Electricity retailer	16	33	**49**	**27**	13	4	**17**	5	3
Bank	14	34	**48**	**30**	13	3	**16**	4	2
Insurance provider	10	27	**37**	**28**	16	4	**20**	5	9

Base: All respondents (n=1,200)

Ease of comparing different offers – 2015

How difficult is it for you to compare the different offers when deciding whether or not to switch your supplier of the following services?

	Very easy %	Fairly easy %	TOTAL EASY %	Neither easy or difficult %	Fairly difficult %	Very difficult %	TOTAL DIFFICULT %	Unsure %	Not applicable %
Mobile telephone provider	19	38	**57**	**24**	7	3	**10**	4	5
Internet provider	16	40	**56**	**24**	9	4	**13**	4	4
Electricity retailer	14	35	**49**	**26**	13	5	**18**	5	3
Bank	13	36	**49**	**25**	13	5	**18**	5	3
Insurance provider	10	29	**39**	**25**	16	5	**21**	5	10

Base: All respondents (n=1200)

11.3.9 Retail data options

Comparison website – 2018

How interested would you be in visiting a comparison website that will provide tailored information outlining all the options that are available to meet your needs, based off tariff and consumption data? We envisage it to be similar to the WebJet website that lists all flights for a specific route, based on your needs while cutting out the deals that aren't compatible.	All %
Base: n=	***1,200***
Very interested	31
Fairly interested	37
TOTAL INTERESTED	**67**
Neither interested/ or uninterested	**19**
Fairly uninterested	3
Very uninterested	6
TOTAL UNINTERESTED	**8**
Unsure	5

Base: All respondents

Comparison website – 2016

How interested would you be in visiting a comparison website that will provide tailored information outlining all the options that are available to meet your needs, based off tariff and consumption data? We envisage it to be similar to the WebJet website that lists all flights for a specific route, based on your needs while cutting out the deals that aren't compatible.	All %
Base: n=	***1,200***
Very interested	28
Fairly interested	39
TOTAL INTERESTED	**67**
Neither interested/ or uninterested	**20**
Fairly uninterested	4
Very uninterested	5
TOTAL UNINTERESTED	**9**
Unsure	4

Base: All respondents

Comparison website – 2015

How interested would you be in visiting a comparison website that will provide tailored information outlining all the options that are available to meet your needs, based off tariff and consumption data? We envisage it to be similar to the WebJet website that lists all flights for a specific route, based on your needs while cutting out the deals that aren't compatible.	All %
Base: n=	***1200***
Very interested	30
Fairly interested	39
TOTAL INTERESTED	**69**
Neither interested/ or uninterested	**17**
Fairly uninterested	3
Very uninterested	5
TOTAL UNINTERESTED	**8**
Unsure	5

Base: All respondents

Third party or broker service – 2018

How interested would you be in using a third party or broker who would do the comparison analysis for you? They would be able to assess the options and provide expert advice, like a mortgage broker. We envisage you will contact them by telephone and they may offer this service for a range of suppliers like insurance, as well as electricity.	All %
Base: n=	***1,200***
Very interested	7
Fairly interested	18
TOTAL INTERESTED	**24**
Neither interested/ or uninterested	**23**
Fairly uninterested	18
Very uninterested	27
TOTAL UNINTERESTED	**44**
Unsure	8

Base: All respondents

Third party or broker service – 2016

How interested would you be in using a third party or broker who would do the comparison analysis for you? They would be able to assess the options and provide expert advice, like a mortgage broker. We envisage you will contact them by telephone and they may offer this service for a range of suppliers like insurance, as well as electricity.	
	All
	%
Base: n=	***1,200***
Very interested	5
Fairly interested	16
TOTAL INTERESTED	**21**
Neither interested/ or uninterested	**28**
Fairly uninterested	18
Very uninterested	27
TOTAL UNINTERESTED	**45**
Unsure	6

Base: All respondents

Third party or broker service – 2015

How interested would you be in using a third party or broker who would do the comparison analysis for you? They would be able to assess the options and provide expert advice, like a mortgage broker. We envisage you will contact them by telephone and they may offer this service for a range of suppliers like insurance, as well as electricity.	
	All
	%
Base: n=	***1200***
Very interested	5
Fairly interested	17
TOTAL INTERESTED	**22**
Neither interested/ or uninterested	**26**
Fairly uninterested	16
Very uninterested	27
TOTAL UNINTERESTED	**43**
Unsure	8

Base: All respondents