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Monitoring the Development of Energy Retail Competition - Residents

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CONTENTS

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Section 1
Introduction

This document has been prepared by McGregor Tan Research to report on the findings of the Residents Research.

Background

1.1 Following the establishment of full contestability of the South Australian electricity retail market in January 2003, the Essential Services Commission of South Australia (ESCOSA) commissioned McGregor Tan Research to conduct a survey among small consumers of electricity in September 2003, August 2004 and a follow up in February 2006. These surveys comprised residential households in Adelaide and regional areas, as well as small business customers.

1.2 The overall intention of these surveys was to monitor any changes from the initial survey as to how competition has been developing in the electricity retail market in South Australia.

1.3 More specifically, this research was to determine the following:

- Awareness of the choice of electricity retailers
- Current electricity retailers used
- The degree to which consumers were receiving offers from electricity retailers
- The degree to which consumers were approaching electricity retailers
- The degree to which consumers were transferring between electricity retailers
- The uptake of electricity contracts
- The likelihood of taking up electricity contracts in the future
- Key household and business demographics

1.4 Given the developments in the market place, and the move to full retail contestability for gas, this research updates the customer surveys undertaken in 2003 and 2004, hence again in 2006 we monitored aspects that were not included in the 2003 survey, namely:

- Intentions - identifying factors driving intentions
- Awareness - identifying any gaps or areas of misunderstanding and transfer experience
- Offers - determining the degree to which customers have understood details, as well as the reasons customers have chosen to accept or decline offers
- Innovation - identify any evidence of innovative product offerings
- The availability of information to assist in assessing the market contract offers received
- The reasons why offers of market contracts may not be accepted by customers
- Experience of any misleading or deceptive behaviour by a retailer
- Ease of the transfer process for customers

Methodology

1.5 McGregor Tan Research conducted 1,211 telephone interviews with residents of South Australia in the following areas:

- Adelaide metropolitan area - 808
- Regional South Australia - 403

1.6 Residents with electricity and reticulated natural gas in their household answered the sections of the questionnaire relating to both electricity and gas, while all other residents – those with electricity only or electricity and bottled gas - responded to the questions relating to electricity only.

1.7 These interviews were conducted from the 31st January to the 13th of February, 2006.

1.8 As part of the research, we asked a number of questions to define the Low Income Segment. These were residents who met the following criteria:

- If they were single, their gross household income was $20,000 or less per year
- If they lived with a partner or spouse, their gross household income was $25,000 or less per year
- If they were single adults with a dependent child or children, their gross household income was $30,000 or less
- If they lived in a household with two or more adults with dependent children, their gross household income was $35,000 or less

1.9 Comparisons of the overall results with this group, where applicable, have been made throughout this report.

1.10 It is important to note that the total sample size of 1,211 allows for a level of accuracy of plus or minus 3%, at a confidence interval of 95%. This level of accuracy is lower for the smaller sample sizes - gas customers, for example.

1.11 The levels of accuracy for all samples sizes relevant to this project are outlined in Appendix 3.

Section 2
Executive Summary

The following Executive Summary covers the key findings of the Residents survey.

2.1 Household Energy Supply

When asked what energy combinations they had in their household, the following combinations were identified:

- Electricity and reticulated natural gas (48%, down from 49% in 2004)
- Electricity only (40%, up from 39%)
- Electricity and bottled gas (12%, unchanged from 2004)

2.2 Energy Consumption

The approximate average consumption of both electricity and gas, as measured by the average quarterly bill, is outlined below.

Consumption of Electricity

There was a relatively even spread of electricity usage, as outlined:

- Less than $150 per quarter (22%, up from 15% in 2004)
- $151 to $200 per quarter (22% up from 19% in 2004)
- $201 to $250 per quarter (16%, up from 15% in 2004)
- $251 to $300 per quarter (15%, down from 18% in 2004)
- $301 to $500 per quarter (20%, down from 27% in 2004)
- $501 to $700 per quarter (4%, down from 6% in 2004)

Consumption of Gas

The majority (76%, up from 67% in 2004) of residents indicated that their quarterly gas bills were in the range from $51 to $150 per quarter, as outlined below:

- Less than $50 per quarter (7%, up from 4% in 2004)
- $51 to $100 per quarter (46%, up from 38% in 2004)
- $101 to $150 per quarter (30%, up from 29% in 2004)
- $151 to $200 per quarter (12%, down from 17% in 2004)
- $201 to $300 per quarter (5%, down from 11% in 2004)

2.3 Awareness of Choice of Retailer

Awareness of Choice of Electricity Retailer

The same proportion of residents were aware that they could choose their own electricity retailer (79%), as in the 2004 survey.

There was however, a slight increase in those who indicated that they were obliged to purchase electricity from their existing retailer (16%, up from 13% in 2004 survey).

Awareness of Choice of Gas Retailer

Awareness of the ability to choose one's own gas retailer was also high, at 79% (up from 78% in 2004) of those surveyed.

Just 13%, (up from 11% in 2004) indicated they were obliged to purchase gas from their existing retailer.

2.4 *Electricity and Gas Retailers*

Electricity Retailers

The proportion of residents purchasing their electricity from AGL has decreased considerably (62%, down from 80% in 2004).

TXU (13%, up from 11%, in 2004), Origin (11%, up from 5%, in 2004), Energy Australia (7%, up from 1% in 2004) and Powerdirect (1%, unchanged since 2004) all recorded increases compared to the previous survey.

When asked which electricity companies they **could** purchase their electricity from, the main responses were:

- AGL (45%, up from 37% in 2004)
- TXU (27%, down from 36% in 2004)
- Origin (26%, down form 29% in 2004)

Gas Retailers

Origin, named by 60% (down from 81% in 2004) of those surveyed, despite a significant decrease, has remained the **current** provider of gas for the majority of residents. The other companies named, were AGL (20%, up from 13%), TXU (9%, up from 3%) and Energy Australia (6%).

Three main companies from which they **could** purchase gas were identified by those residents, namely Origin (43%, up from 39% in 2004) AGL (35%, down from 45% in 2004), and TXU (18%, down from 27% in 2004).

2.5 *Offers of Contract*

Electricity Retailers

There has been an increase in the proportion of respondents who have received an offer of a contract from an electricity retailer (52%, up from 44% in 2004).

TXU and AGL were the retailers from which many had received offers. The companies from which offers had been received, and their comparison to the 2004 survey, are outlined below:

- AGL (31%, down from 39% in2004)
- TXU (24%, down from 40% in 2004)
- Origin (22%, up from 15% in 2004)
- Energy Australia (11%, up from 5% in 2004)
- Powerdirect (2% unchanged from 2004)

Two thirds (65%) of those who had received an offer indicated that the offer was easy to understand. This compares to less than one in five (17%) who indicated the offer was difficult to understand.

Gas Retailers

One third of residents (34%, up from 20% in 2004) had received an offer of a contract from a gas retailer, compared to 61% who had not.

Origin (29%, down from 32% in 2004) AGL (28%, down from 45% in 2004), TXU (24%, down from 30% in 2004) and Energy Australia (14%, up from 5% in 2004) were the main companies named from which contract offers had been received.

A relatively high proportion (74%, up from 68% in 2004) of those who had received an offer indicated that the offer was easy to understand.

2.6 *Approaching Retailers*

Electricity Retailers

The incidence of approaching any electricity retailer(s) to ask about buying electricity was low (8%, down from 10%, in 2004).

Amongst this group, the main retailers which had been approached were:

- AGL (42%, compared to 47% in 2004)
- TXU (33%, compared to 38% in 2004)
- Origin (26%, compared to 34% in 2004)

Few (4%) of those who had approached an electricity retailer were refused by the retailer.

Gas Retailers

The incidence of having approached any gas retailer(s) to ask about purchasing gas from them was low (6%, down from 8% in 2004).

AGL (53%, up from 44% in 2004), Origin (31%, down from 49% in 2004), Energy Australia (25%, up from 4% in 2004) and TXU (22%, down from 24% in 2004) were the main retailers that had been approached.

Again, few (6%, up from 4% in 2004) of those who had approached a gas retailer were refused by the retailer.

2.7 New Contracts

Electricity Contracts

More than a third (41%, up from 28% in 2004) of the residents surveyed had taken out a contract with an electricity retailer, a substantial increase over the previous survey.

For the overwhelming majority of those who had taken out a contract (88%, up from 85% in 2004), the transfer process was considered to be easy. Just 5% of this group considered the transfer process to be difficult.

A high proportion (77%, down from 94% in 2004) of these respondents indicated that AGL was their previous retailer. Origin (5%) and TXU (3%) were also named by small proportions of those surveyed.

For those who had taken out a contract, the main driver in their decision to change retailers was price/ cost (68%).

For those who had not taken out a contract, the main reason given by residents was that they were happy with their current retailer (53%, up from 32% in 2004). Other reasons included:

- Insufficient information (12%, down from 19% in 2004)
- Cannot be bothered/ too hard/ lazy/ doesn't interest me (6%, up from 3% in 2004)
- Do not like contracts/ too binding/ want freedom to change (5%)
- Waiting for better offers (4%, down from 9% in 2004)
- Have not been offered a contract (4%, up from 3% in 2004)
- Inadequate potential savings (3%, down from 6% in 2004)
- Concern with the transfer process (3%, up from 2% in 2004)

A very small proportion (3%) of all residents surveyed indicated that they had entered into a contract and used the cooling off period to cancel.

In relation to taking out a contract with an electricity retailer in the next twelve months, a significantly higher proportion indicated that they would be unlikely to do so (73%) when compared to the 2004 survey (51%). The scaled responses were as follows:

- Very likely (5%)
- Quite likely (7%)
- Neither likely nor unlikely (12%)
- Quite unlikely (18%)
- Very unlikely (55%)
- Do not know/not sure (4%)

These responses indicate that a higher proportion of those surveyed have made a decision about an electricity retailer - do not know/not sure (4%, down from 10% in 2004), as well as the fact that a significant proportion (41%, up from 28% in 2004) of residents have already taken out a contract with an electricity retailer.

Gas Contracts

A third (32%, up from 15% in 2004) of those surveyed indicated that they had taken out a contract with a gas retailer.

A high proportion (90%, up from 80% in 2004) of these respondents indicated that the transfer process was easy, compared to just 3% (unchanged from 2004) who stated that this process was difficult.

Most (62%, down from 84% in 2004) of these residents named Origin as their previous retailer. AGL (18%, up from 13% in 2004), TXU (2%, up from 1% in 2004) and Energy Australia (1%) were the other suppliers that were mentioned.

For those who had taken out a contract, the main driver in their decision to change retailers was price/ cost (62%). Other responses included:

- To have both with same provider/ convenience / one bill (9%)
- Consistency of supply (6%)

For those who had not taken out a contract, similar reasons were identified as for electricity, as outlined:

- Happy with the current retailer (50%, up from 36% in 2004)
- Do not like contracts/ do not want to be tied to anything (7%)
- Have not been approached/offered a contract (6%, up from 4% in 2004)
- Cannot be bothered (6%, up from 3% in 2004)
- Have not looked into/ compared/ shopped around (6%)
- Not interested/ don't care (5%)
- Insufficient information (5%, down from 19% in 2004)
- Inadequate potential savings (3%, down from 5% in 2004)
- Have not got around to it (3%, down from 4% in 2004)

Just 2% (up from 1% in 2004) of those surveyed indicated that they had entered into a contract and used the cooling off period to cancel.

There was a drop in the proportion of the residents surveyed (14%, down from 28% in 2004) who stated that they would be likely to take out a contract with a gas supplier in the next twelve months, compared to the majority (70%, up from 49% in 2004) who indicated that they would not be likely to do so.

2.8 *Important Factors in Switching Retailers*

Electricity and Gas Retailers

Residents were asked to rate, on a scale of 1 to 5, where 5 is very important and 1 is not at all important, the importance of a number of factors in relation to the decision to switch retailers. It is generally considered that an average rating of 3.5 is important, 4.0 is very important and 4.5 or above is extremely important.

Based on these parameters, there was an extremely high level of importance attributed to price, supply and the level of customer service, and a relatively low level of importance attributed to having both contracts with the one retailer. The level of customer service was also asked for the first time, results suggest it is of high importance. These responses were similar for both electricity and gas retailers, as outlined:

- Price - average rating (electricity 4.6, down from 4.7; gas 4.7, unchanged from 2004)
- Supply - average rating (both electricity and gas, 4.5, up from 4.4 in 2004)
- The level of customer service – average rating (electricity 4.1, gas 4.3)
- Having both contracts with the one supplier - average rating (electricity 2.9, up from 2.6 in 2004, gas 3.3, up from 3.1 in 2004)

2.9 *Information*

Information about Electricity Contracts

A relatively small proportion (13%, down from 15% in 2004) of those surveyed indicated that they had looked for information to assist them in making a decision about moving to a market contract with an electricity supplier.

A number of sources of information were identified amongst this group, including:

- The retailer (24%, up from 26% in 2004)
- The Internet (24%, up from 14% in 2004)
- Representatives of the retailer (16%, up from 13% in 2004)
- Brochures/flyers/ pamphlets (15%, up from 10% in 2004)
- Newspaper advertisements (11%, down from 22% in 2004)
- Friends/family/ work colleagues (9%, down from 13% in 2004)

For more than three quarters (81%, up from 76% in 2004) of these residents, the information was easy to obtain.

When asked if the information was easy to understand and compare offers, more than half (55%, up from 54% in 2004) indicated that this was so. There were, however, over one quarter (29%, up from 28% in 2004) who stated that this process was difficult.

There was a high proportion (75%, up from 65%) who indicated that they were able to obtain sufficient information to make an informed choice. The vast majority (80%) of these residents considered this information to be important in making their decision to switch retailers.

Information about Gas Contracts

A small proportion of residents (7%, down from 8% in 2004) indicated that they had looked for information to assist them in making a decision about moving to a market contract with a gas supplier.

The information sources accessed by these residents were:

- The retailer (33%, down from 36% in 2004)
- Advertisements (23%, down from 29% in 2004)
- The Internet (28%, up from 18% in 2004)
- Family/friends/work colleagues (14%, up from 13% in 2004)

- Representatives of the retailer (7%, up from 4% in 2004)

For the overwhelming majority (77%, down from 80% in 2004) of this group, this information was easy to find. A significant proportion (60%, down from 67% in 2004) of this group also indicated that it was easy to understand the information and compare offers, however over a quarter (28%) still considered it difficult.

The majority (72%, down from 76% in 2004) of these residents also stated that they were able to obtain sufficient information to make an informed choice. The overwhelming majority (91%) of these residents, considered this information important in making their decision to switch retailers.

2.10 *Understanding Bills*

Electricity and Gas Bills

Those surveyed were read two statements relating to the format of gas and electricity offers and asked to rate, on a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, their level of agreement with these statements. It is generally considered that an average rating of 3.5 represents a reasonably high level of agreement, 4.0 a very high level of agreement and 4.5 or above an extremely high level of agreement.

There were similar responses for both electricity and gas.

There was a high level of agreement that both electricity and gas bills are easy to understand – electricity average rating of 4.2, gas 4.4.

There was a lower level of agreement with the statement that the information contained in electricity bills enables comparisons with other retailer's offers, with an average rating of 3.4, and gas bills recorded a marginally higher average rating of 3.7.

2.11 *Misleading and Deceptive Behaviour*

The incidence of having experienced misleading or deceptive behaviour from retailers was low. When read a number of statements relating to misleading and deceptive behaviour from energy retailers, the overwhelming majority (82%, down from 87% in 2004) of those surveyed indicated that they had not experienced any of this behaviour in the past twelve months.

Relatively small proportions of residents indicated that they had experienced a number of these types of behaviour, as outlined:

- High pressure selling including badgering and harassment (11%, up from 6% in 2004)
- Provision of misleading or deceptive information (5% unchanged from 2004)
- An attempt to trick you into signing a contract (4%, up from 3% in 2004)
- Actual tariffs did not match quoted tariffs (2% unchanged from 2004)
- Transferring you to another retailer without your explicit consent (1% unchanged from 2004)

2.12 *Variety and Innovation of Offers*

Those surveyed were read two statements relating to the variety and innovation of gas and electricity offers and asked to rate, on a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, their level of agreement with these statements. It is generally considered that an average rating of 3.5 represents a reasonably high level of agreement, 4.0 a very high level of agreement and 4.5 or above an extremely high level of agreement.

Based on these parameters, there was a reasonably high level of agreement that there is a greater variety of offers available compared to a year ago - average rating of 3.7 unchanged from 2004.

In relation to the offers of a year ago being more innovative, there was a mixed response, with an average rating of 3.3, up from 3.1 in 2004.

2.13 *Awareness of Independent Assistance*

Over one fifth (22%, down from 24% in 2004) of the residents surveyed indicated that they were aware of the availability of independent assistance, such as ESCOSA's Electricity Price Comparison Service, to help in making energy decisions. Three quarters (75%) of respondents were unaware of this service.

2.14 *Incidence of Having the Same Retailer for Both Electricity and Gas*

Almost one quarter (24%, up from 22% in 2004) residents surveyed purchase both electricity and gas from the same retailer, as outlined:

- AGL (9%, down from 12% in 2004)
- Origin (8%, up from 7% in 2004)
- TXU (4%, up from 3% in 2004)

2.15 *Retailers Response*

The majority (73%) of respondents had not contacted their retailer in the past twelve months, compared to 27% who had.

Those surveyed were read two statements relating to the customer service received from their retailer and asked to rate, on a scale of 1 to 5, where 5 is very satisfied and 1 is dissatisfied, their level of satisfaction with these statements. It is generally considered that an average rating of 3.5 represents a reasonably high level of satisfaction, 4.0 a very high level of satisfaction and 4.5 or above an extremely high level of satisfaction.

Based on these parameters, there was a reasonably high level of satisfaction that the timeliness of the response - average rating of 3.7.

In relation to the assistance provided, there was also a reasonably high level of satisfaction, with an average rating of 3.8.

Section 3
Electricity

This Section outlines the key findings of the Electricity Research. For further analysis by age, gender, occupation, household composition etc. please refer to the Computer Tabulations.

3.1 Electricity Consumption

3.1.1 Those surveyed were asked what was their approximate average consumption of electricity as represented by their average quarterly bill.

3.1.2 There was a relatively even spread of electricity usage, as outlined:

- Less than $150 per quarter (22%, up from 15% in 2004)
- $151 to $200 per quarter (22% up from 19% in 2004)
- $201 to $250 per quarter (16%, up from 15% in 2004)
- $251 to $300 per quarter (15%, down from 18% in 2004)
- $301 to $500 per quarter (20%, down from 27% in 2004)
- $501 to $700 per quarter (4%, down from 6% in 2004)

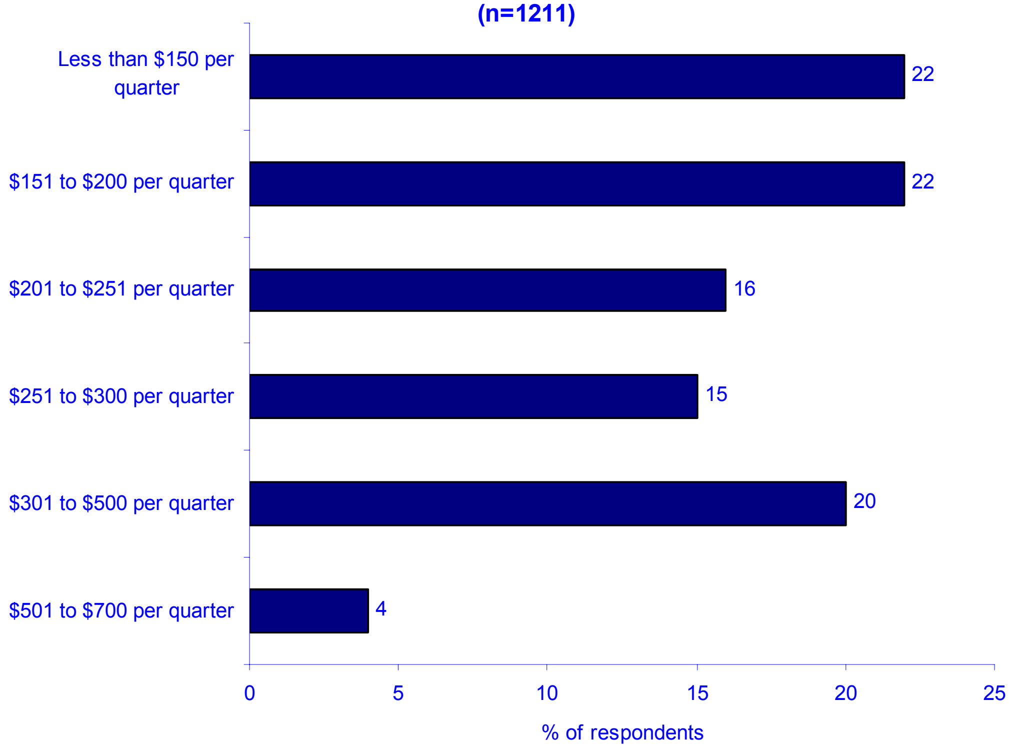
3.1.3 Lower usage of electricity was mainly identified among the older demographic and lower income groups, as outlined:

- Less than $150 per quarter
    - Those whose household income is less than $15,000 per annum (52%) and between $15,001 and $25,000 per annum (33%)
    - Those aged 65 plus (43%) and retired people (39%)
    - Those receiving an energy concession (38%)
    - Those in the defined low income segment (39%)
    - Those not in paid work (33%)
    - There was also a higher proportion of singles who lived on their own (51%) whose electricity consumption was in this range

➢ $151 to $200 per quarter

- Those whose household income is between $15,001 and $25,000 per annum (31%)
- Those aged 65 plus (26%) and retired people (27%)
- Those receiving an energy concession (27%)
- Those in the defined low income segment (26%)
- Those not in paid work (25%)
- Again, there was also a higher proportion of singles who lived on their own (30%) whose electricity consumption was in this range

WHAT IS YOUR APPROXIMATE AVERAGE CONSUMPTION OF ELECTRICITY AS REPRESENTED BY YOUR AVERAGE QUARTERLY BILL? (n=1211)



3.2 Awareness of Choice of Electricity Retailer

3.2.1 Respondents were initially read two statements and asked to indicate which they thought to be correct. These statements were:

- I can choose my own electricity retailer now
- I am obliged to purchase electricity from my existing retailer

3.2.2 The same proportion of residents (79%) were aware that they could choose their own electricity as was recorded in the 2004 survey.

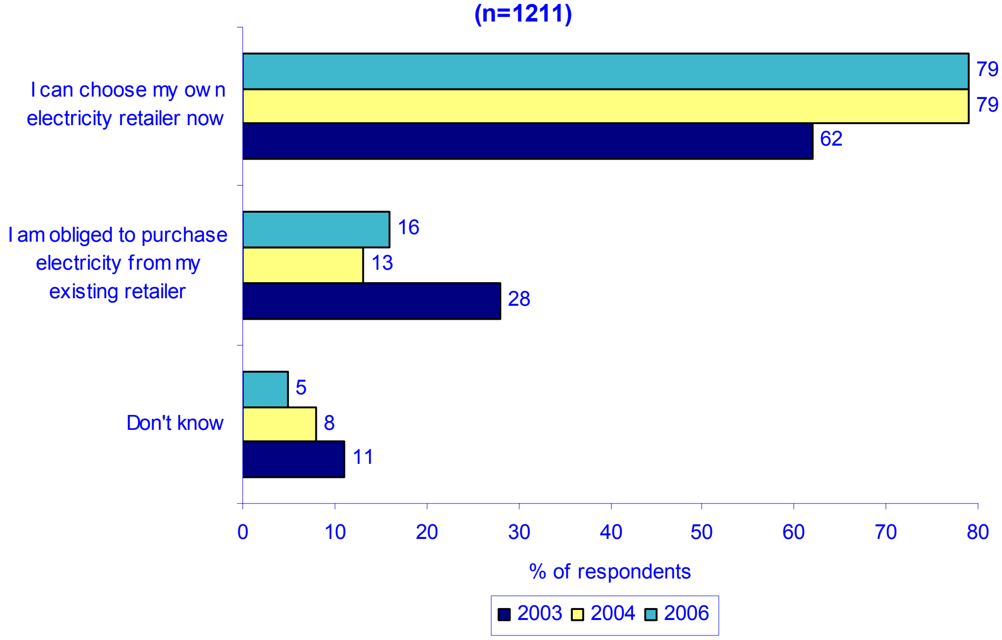
3.2.3 There was however, a slight increase in those who indicated that they were obliged to purchase electricity from their existing retailer (16%, up from 13% in 2004 survey).

3.2.4 There were higher incidences of awareness of the ability to choose their own electricity retailer among the following groups:

- Those who had received an offer of a contract from an electricity retailer (81%)
- Professionals/executives (86%)
- Those in paid work (82%)
- Those living in metropolitan Adelaide (81%)

3.2.5 Conversely, those residents classified as low income had a higher proportion who indicated that they were obliged to purchase electricity from their existing retailer (21%).

AS FAR AS YOU ARE AWARE, WHICH OF THE FOLLOWING APPLIES?
(n=1211)



3.3 Electricity Retailers

Electricity Retailers Currently Used

3.3.1 Those surveyed were asked from which company they currently purchased their electricity.

3.3.2 The proportion of residents purchasing their electricity from AGL has decreased considerably (62%, down from 80% in 2004).

3.3.3 Conversely, most of the other companies named recorded increases compared to the previous survey as outlined:

- TXU (13%, up from 11%, in 2004)
- Origin (11%, up from 5%, in 2004)
- Energy Australia (7%, up from 1% in 2004)
- Powerdirect (1%, unchanged from in 2004)
- South Australian Electricity (1%, not named in 2004)

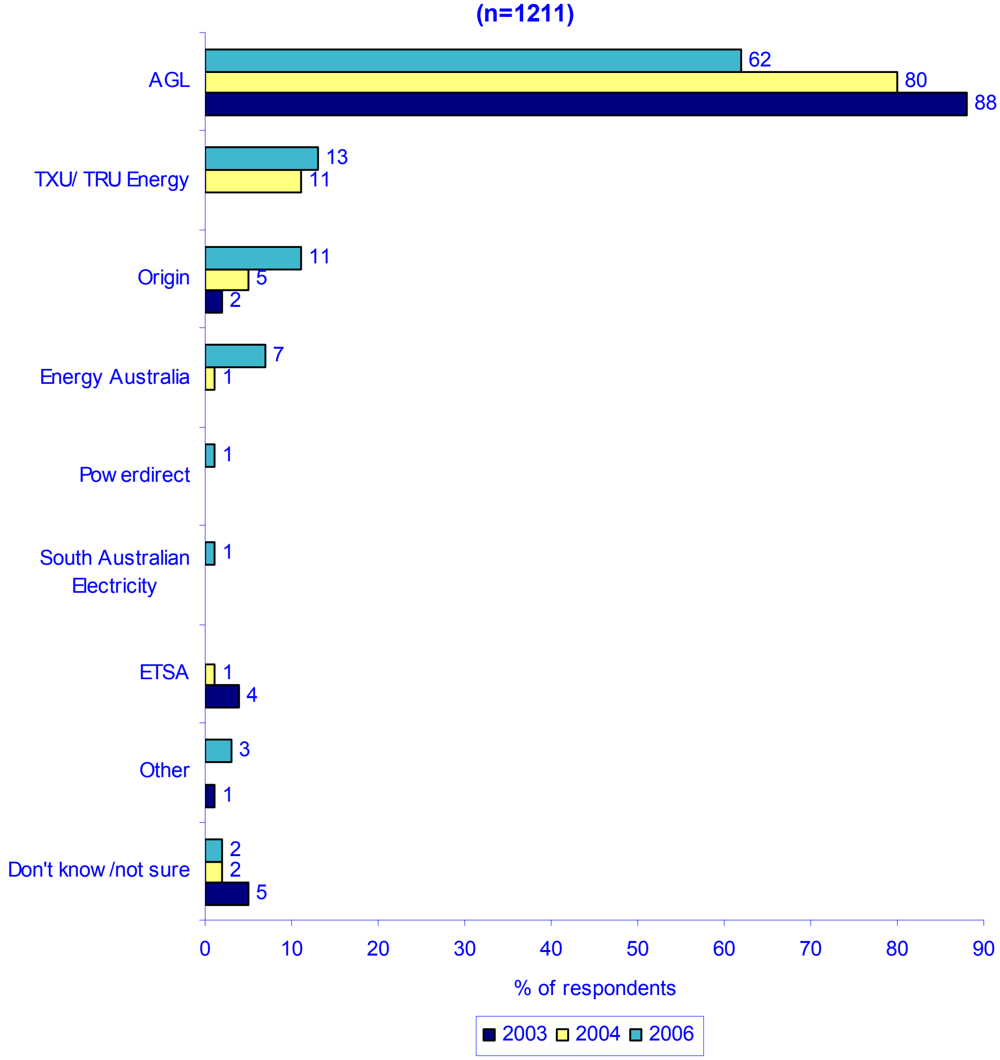
3.3.4 There were a number of variances to these responses among the groups surveyed, including:

- AGL was named by higher proportions of those aged 65 plus (69%), those who were retired (67%), those who live on their own (69%), those with an income of under $15,000 per annum (73%), and those living in regional South Australia (71%)
- TXU was more likely to be named by those who listed their occupation as home duties (21%), and "other" - students, unemployed, etc. (19%)
- TXU was also more likely to be named by those who had taken out a contract with an electricity retailer (24%) and those who had received an offer of a contract from an electricity retailer (16%)

- Origin was also more likely to be named by those who had taken out a contract with an electricity retailer (16%)

- Energy Australia was more likely to be named by those who had taken out a contract with an electricity retailer (14%) and those who had received an offer of contract from an electricity retailer (10%)

WHICH COMPANY DO YOU CURRENTLY BUY ELECTRICITY FROM? (n=1211)



Electricity Retailers which could be used

3.3.5 Respondents were then asked to identify the electricity companies from which they could buy electricity.

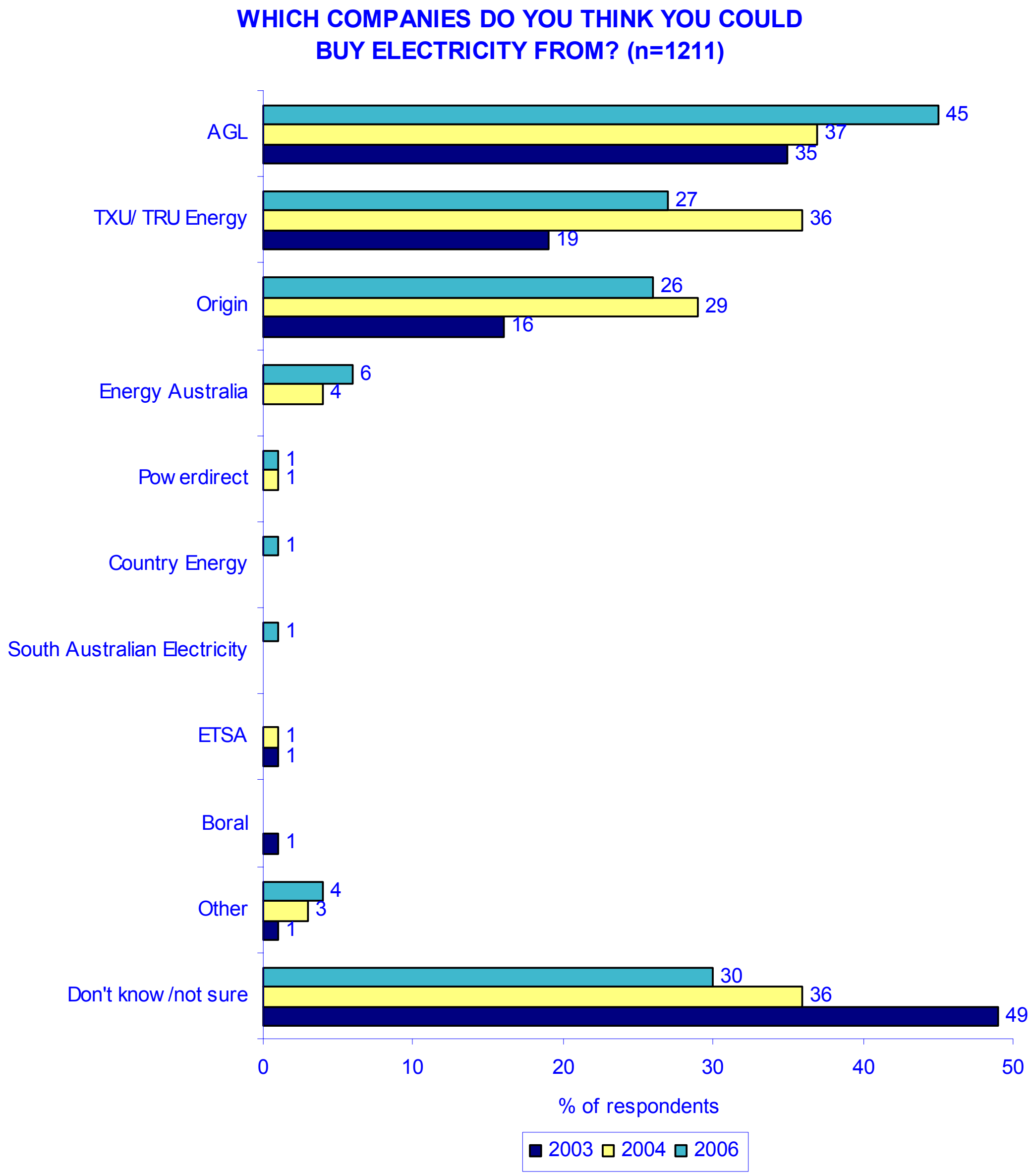
3.3.6 The main responses were:

- AGL (45%, up from 37% in 2004)
- TXU (27%, down from 36% in 2004)
- Origin (26%, down form 29% in 2004)
- Energy Australia (6%, up from 4% in 2004)

3.3.7 Those living in metropolitan Adelaide were more likely to name AGL (48%), TXU (32%) and Origin (30%), while a higher proportion of those living in regional South Australia (38%) indicated they did not know or were not sure from which companies they could buy electricity.

3.3.8 Those aged under 40 were more likely to name TXU (37%) and Energy Australia (10%).

3.3.9 Among other variances, there were higher incidences of naming AGL, TXU, Origin and Energy Australia among both those who had taken out a contract with an electricity retailer, and those who had received an offer of a contract from an electricity retailer.


WHICH COMPANIES DO YOU THINK YOU COULD BUY ELECTRICITY FROM? (n=1211)
AGL
45
37
35
TXU/ TRU Energy
27
36
19
Origin
26
29
16
Energy Australia
6
4
Pow erdirect
1
1
Country Energy
1
South Australian Electricity
1
ETSA
1
1
Boral
1
Other
4
3
1
Don't know /not sure
30
36
49
0
10
20
30
40
50
% of respondents
2003
2004
2006

3.4 Offers of Contract

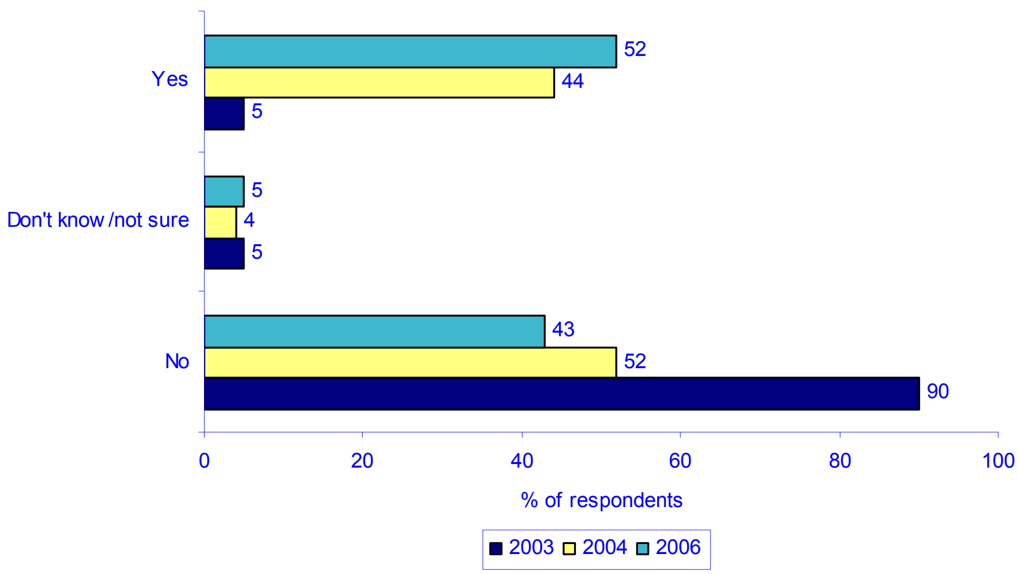
Incidence of Receiving an Offer of an Electricity Contract

3.4.1 Those surveyed were asked if they had received an individual offer of a contract from any electricity retailer, including their existing retailer, to sell them electricity.

3.4.2 There has been an increase in the proportion of respondents who have received an offer of a contract from an electricity retailer (52%, up from 44% in 2004).

3.4.3 There was little variation amongst the groups surveyed.

HAVE YOU RECEIVED AN INDIVIDUAL OFFER OF A CONTRACT FROM ANY ELECTRICITY RETAILER, INCLUDING YOUR EXISTING RETAILER, FOR THEM TO SELL YOU ELECTRICITY? (n=1211)



Electricity Retailer from Whom the Offer was received

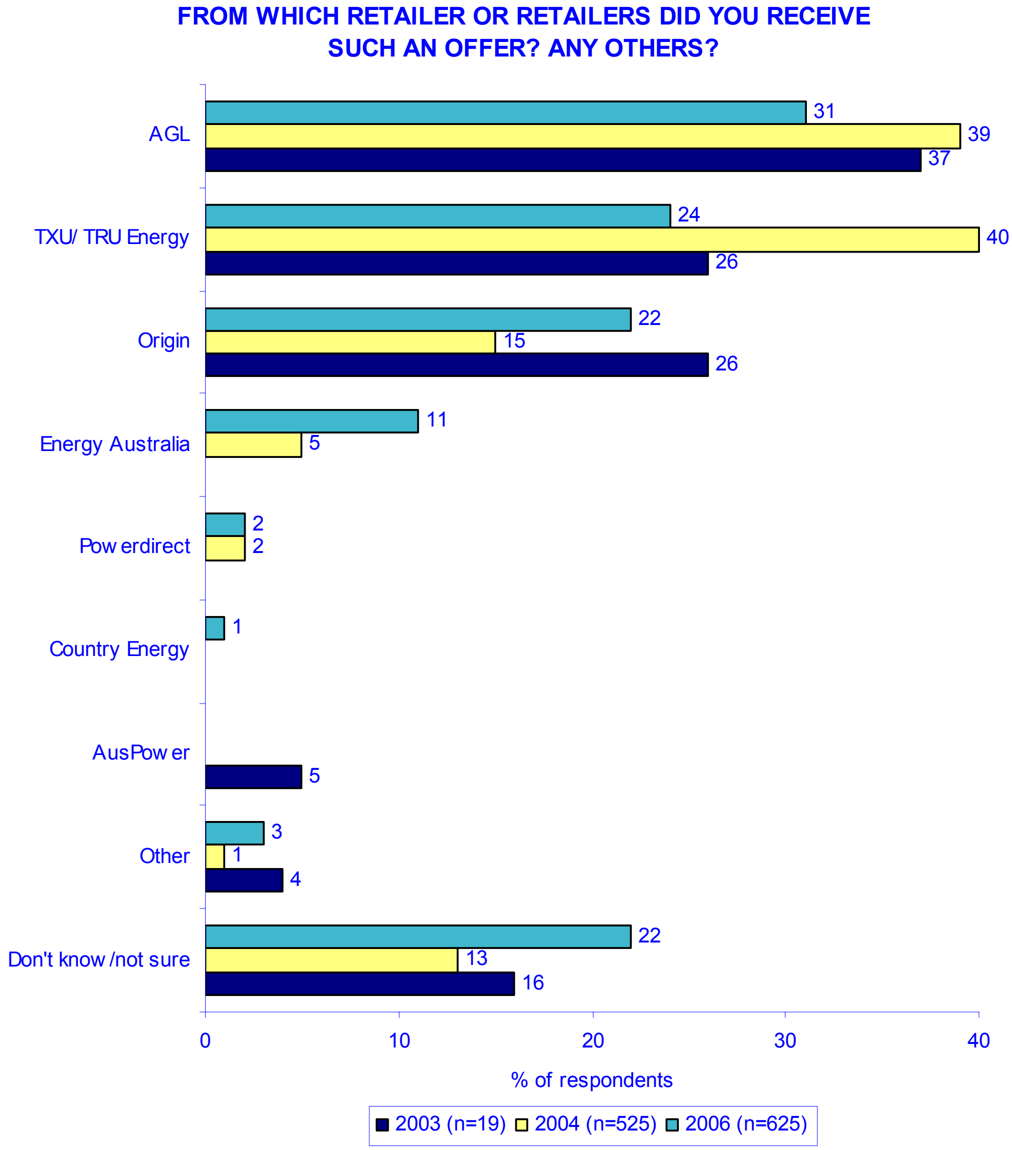
3.4.4 Those who had received an offer of a contract were asked from which retailer(s) they had received such an individual offer.

3.4.5 TXU and AGL were the retailers from which many had received offers. The companies from which offers had been received, and their comparison to the 2004 survey, are outlined below:

- AGL (31%, down from 39% in 2004)
- TXU (24%, down from 40% in 2004)
- Origin (22%, up from 15% in 2004)
- Energy Australia (11%, up from 5% in 2004)
- Powerdirect (2% unchanged from 2004)

3.4.6 There were a number of variances to these responses among the groups surveyed, including:

- AGL was more likely to be named by those in the older demographic and regional respondents - those aged 65 plus (39%), those living in regional areas (35%)
- TXU was named by higher proportions of those in paid work (28%) and those aged 18 to 39 (32%)
- Origin was named by higher proportions of residents in Adelaide metropolitan area (25%), of those earning $50,001 to $75,000 (33%) and $75,001 to $100,000 (34%)
- There were higher incidences of naming AGL (37%) and Energy Australia (14%) among those who had taken out a contract with an electricity retailer



Ease of Understanding the Offer

3.4.7 Those who had received an offer of a contract were asked how easy it was to understand the offer.

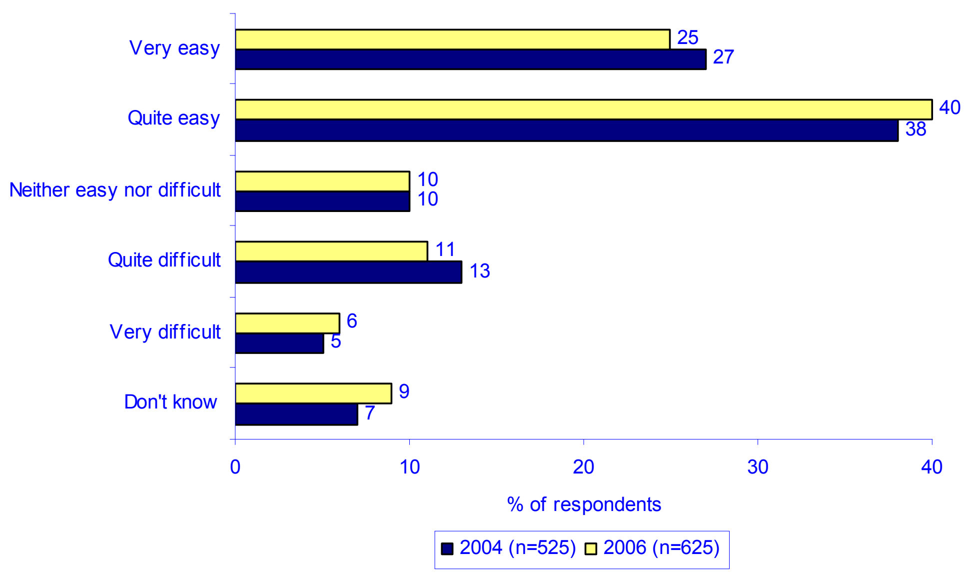
3.4.8 Almost two thirds (65%) of those who had received an offer indicated that the offer was easy to understand. This compares to less than one in five (17%) who indicated the offer was difficult to understand.

3.4.9 The scaled responses were as follows:

- Very easy (25%)
- Quite easy (40%)
- Neither easy nor difficult (10%)
- Quite difficult (11%)
- Very difficult (6%)

3.4.10 There were few variances to these responses, although a higher proportion of those who had taken out a contract with an electricity retailer (74%) indicated that the offer was easy to understand.

HOW EASY WAS IT TO UNDERSTAND THE OFFER?



3.5 Approaching Electricity Retailers

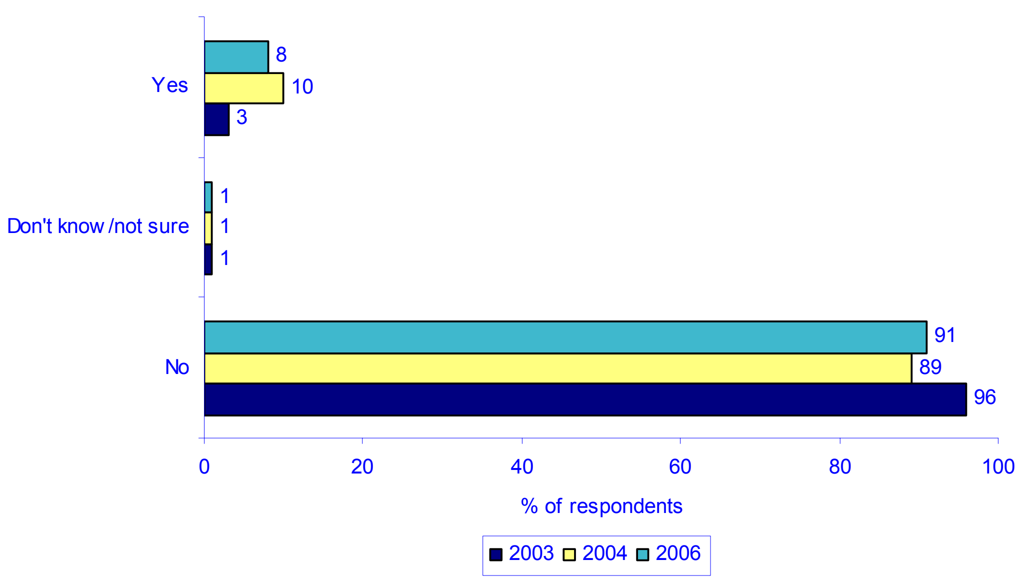
Incidence of Approaching Electricity Retailers about Purchasing Electricity

3.5.1 Respondents were asked if they had approached any electricity retailer(s), including their existing retailer, to ask about buying electricity from them.

3.5.2 The incidence of approaching a retailer or retailers, remained relatively low (8%, down from 10% in 2004).

3.5.3 A few of the groups surveyed were more likely to have approached a retailer or retailers, including those who had taken out a contract with an electricity retailer (14%), those who had received an offer of a contract from an electricity retailer (10%), and those in living in metropolitan Adelaide (10%).

HAVE YOU APPROACHED AN ELECTRICITY RETAILER OR RETAILERS, INCLUDING YOUR EXISTING RETAILER, TO ASK ABOUT BUYING ELECTRICITY FROM THEM? (n=1211)



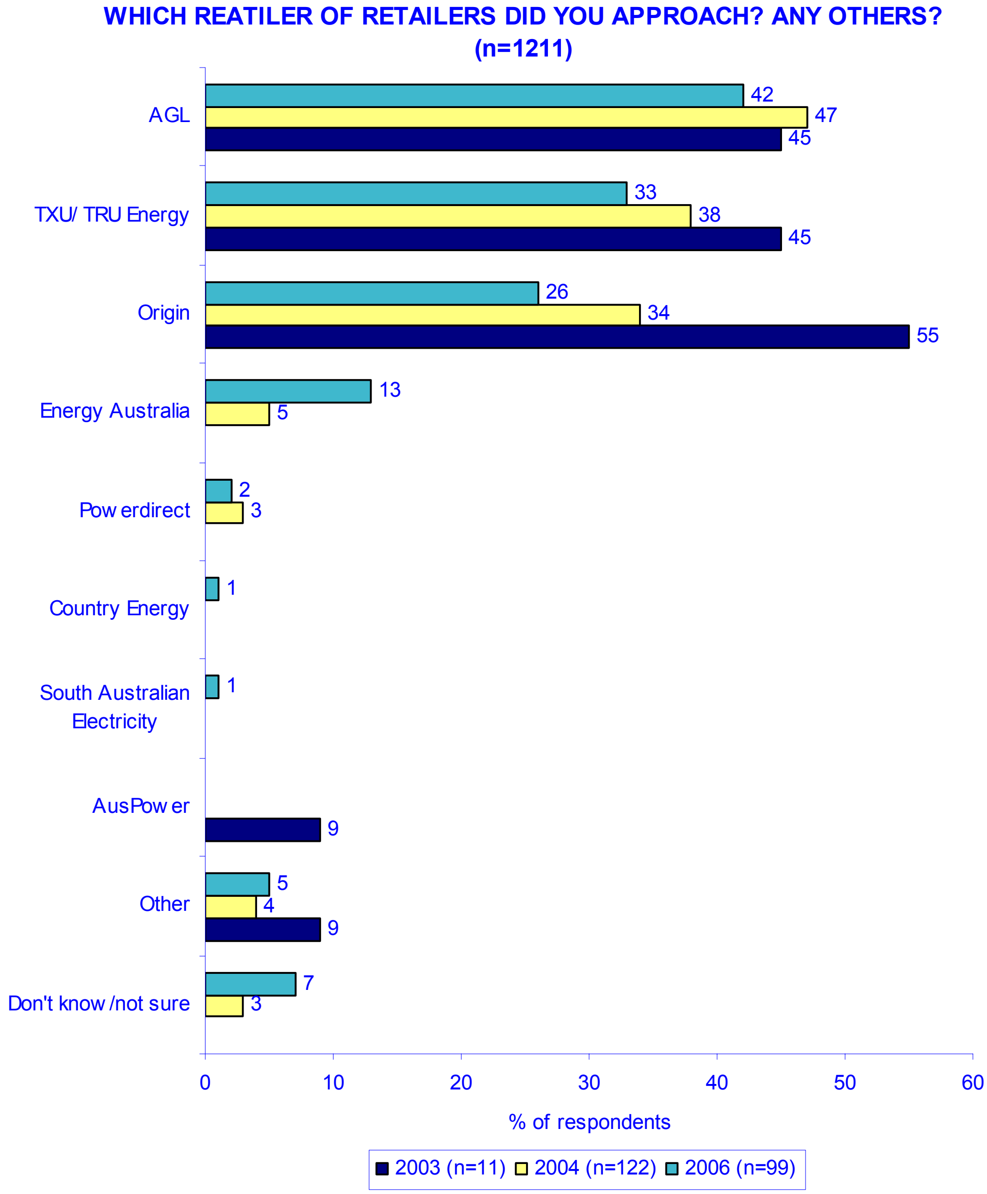
Electricity Retailer that was Approached

3.5.4 Those who had approached an electricity retailer were asked which retailer(s) they approached.

3.5.5 The main retailers which had been approached were:

- AGL, (42% compared to 47% in 2004)
- TXU, (33% compared to 38% in 2004)
- Origin, (26% compared to 34% in 2004)

3.5.6 There were few variances to these responses among the groups surveyed.

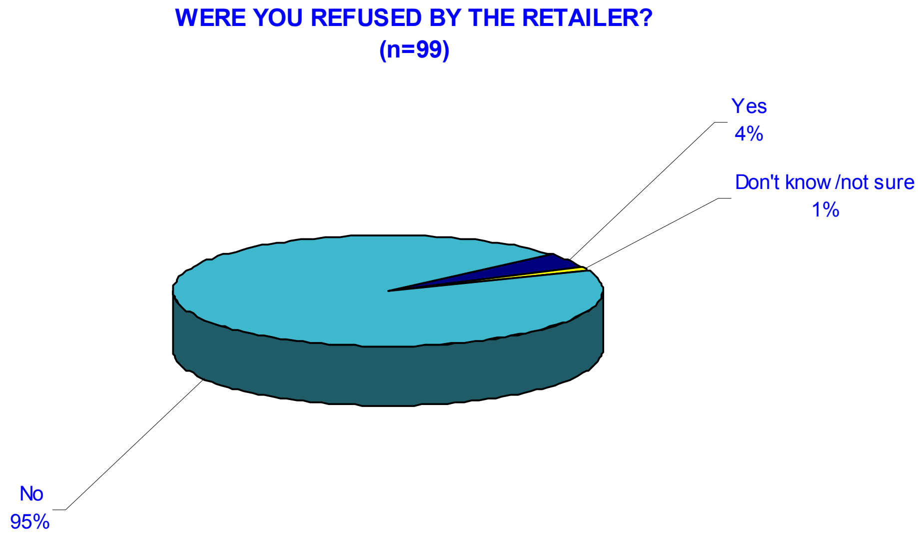


Incidence of Being Refused by the Electricity Retailer

3.5.7 Those who had approached an electricity retailer were asked if they were refused by the retailer.

3.5.8 A very small proportion (4%) of this group indicated that they had been refused by the retailer, compared to 95% who had not.

3.5.9 There were few variances to these responses among the groups surveyed.



3.6 New Contracts

Incidence of Having Taken Out a Contract

3.6.1 Those surveyed were asked if they had taken out a contract with an electricity retailer.

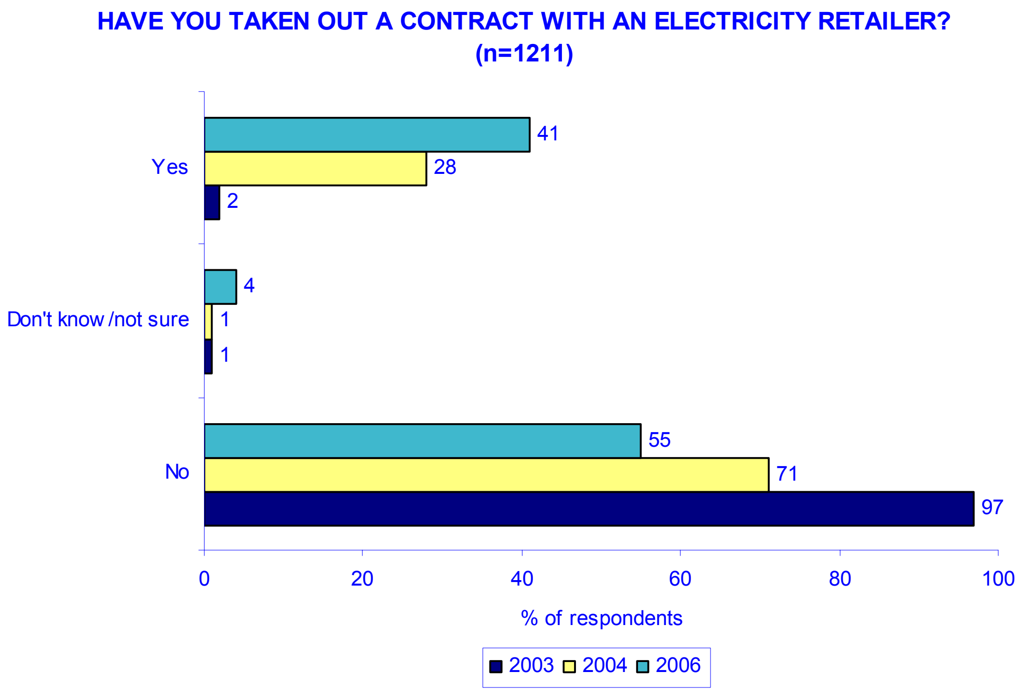
3.6.2 There has been a significant increase in the incidence of having taken out a contract with a retailer when compared to 2004. More than a third (41%) had taken out a contract, compared to just 28% in 2004 and 2% in 2003.

3.6.3 Not surprisingly, those who had received an offer of a contract from an electricity retailer (63%) were more likely to have taken out a contract.

3.6.4 Others who were more likely to have taken out contracts included:

- Those receiving an energy concession (46%)
- Those living in Adelaide metropolitan area (44%)
- Those not in paid work (44%)

3.6.5 Conversely, younger people aged 18-39 (65%), those in paid work (61%), and those living in regional South Australia (64%) were less likely to have taken out a contract with an electricity retailer.



Ease of the Transfer Process

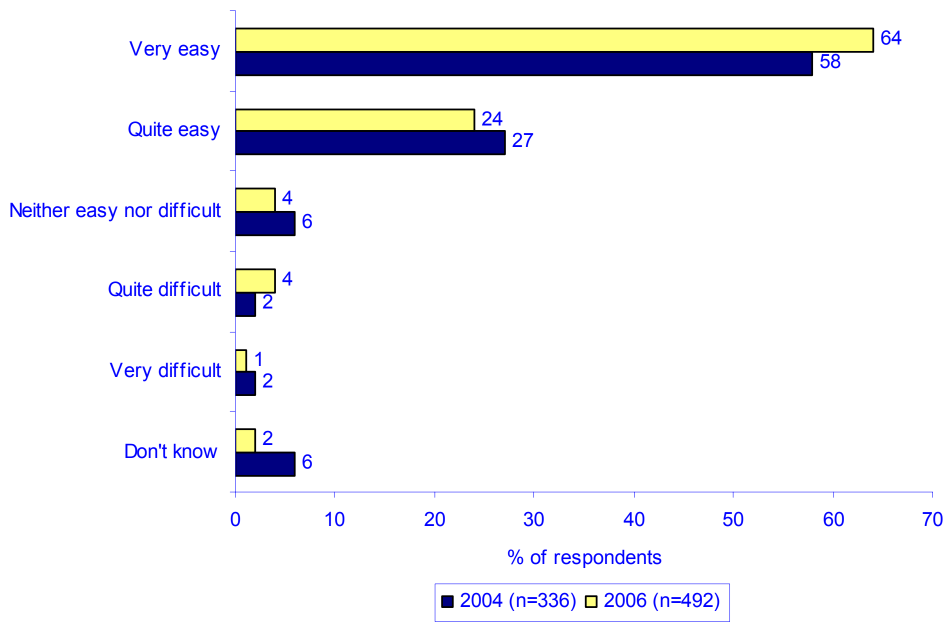
3.6.6 Those who had taken out a contract with an electricity retailer were asked to rate, on a 5 point scale, where 1 is very easy and 5 is very difficult, how easy was the transfer process.

3.6.7 The overwhelming majority (88%, up from 85%) of those who had taken out a contract considered the transfer process to be easy. Just 5% of this group considered the transfer process to be difficult. The scaled responses were as follows:

- Very easy (64%)
- Quite easy (24%)
- Neither easy nor difficult (4%)
- Quite difficult (4%)
- Very difficult (1%)

3.6.8 There were few variances to these responses among the groups surveyed, however, a higher proportion of those aged 31 to 39 found the transfer process difficult (13%).

HOW EASY WAS THE TRANSFER PROCESS?



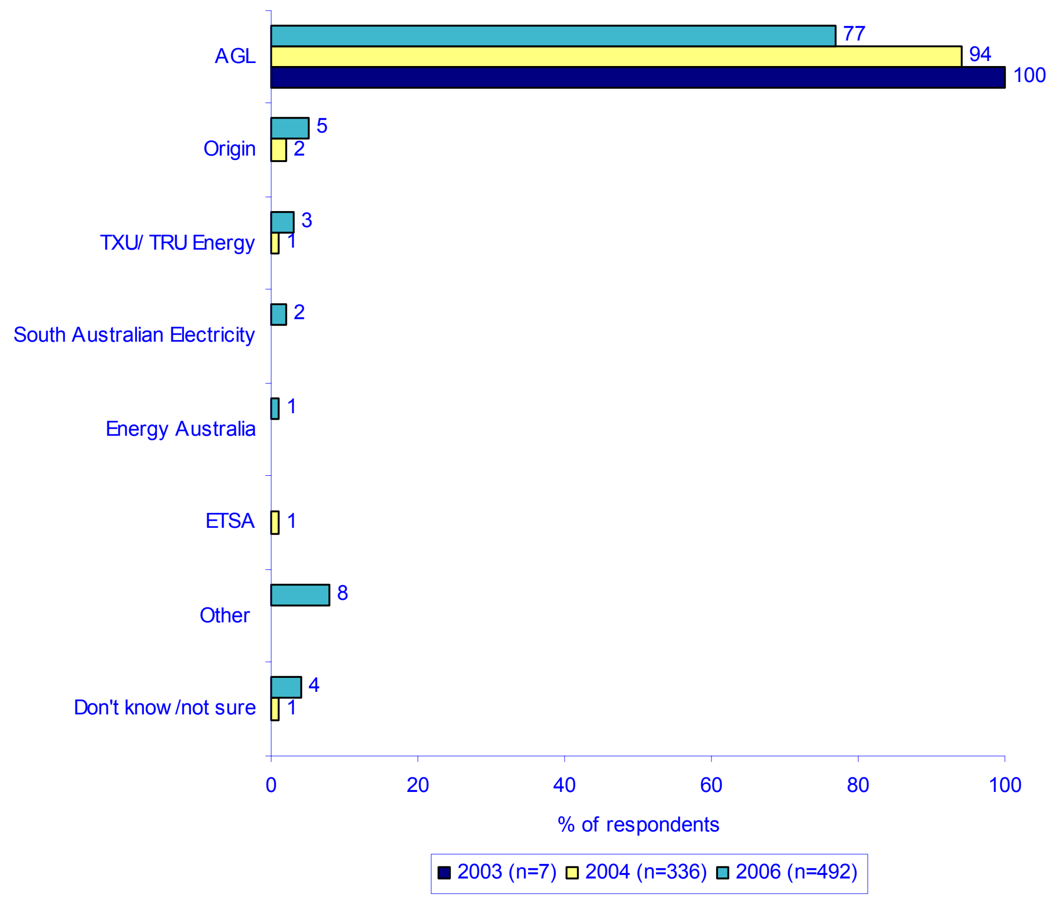
Previous Retailer

3.6.9 Those who had taken out a contract with an electricity retailer were asked to name their old or previous retailer.

3.6.10 A significant number (77%, down from 94% in 2004) of these respondents indicated that AGL was their previous retailer. Small proportions named Origin (5%, up from 2% in 2004), TXU (3%, up from 1% in 2004) and South Australian Electricity (2%).

3.6.11 There were few variances to these responses among the groups surveyed, although a higher proportion of those in professional/ executive occupations (88%) named AGL.

WHAT WAS THE NAME OF YOUR OLD OR PREVIOUS RETAILER?



Main Driver for Taking out a Contract

3.6.12 Those who had taken out a contract were asked what was the main driver in their decision to change retailers.

3.6.13 For those who had taken out a contract, the main driver in their decision to change retailers was price/ cost (68%). Small proportions named other drivers, including:

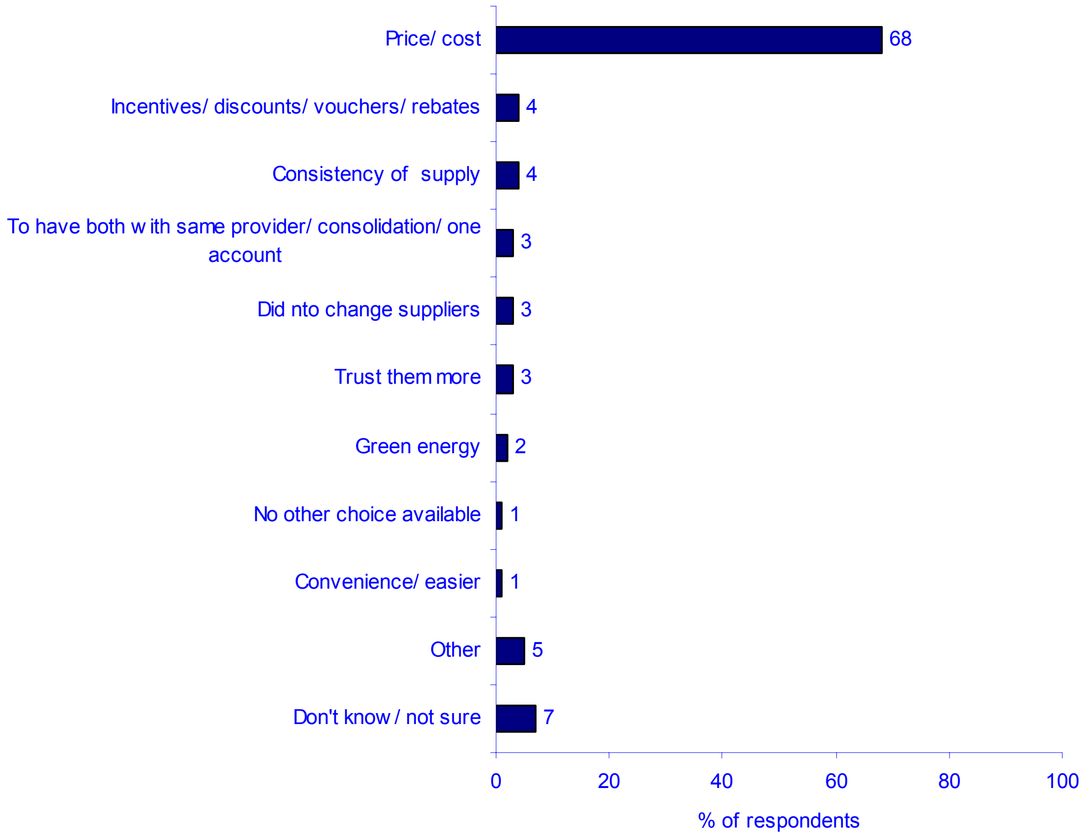
- Consistency of supply (4%)
- Incentives/ discounts/ vouchers/ rebates (4%)
- Trust them more (3%)

- To have both with same provider/ consolidation/ one account (3%)
- Green Energy (2%)

3.6.14 A further 3% indicated that they had not changed retailers.

3.6.15 Higher proportions of those residents in paid work (74%), particularly those earning $75,001 to $100,000 per annum (91%), and residents aged 40 to 54 (75%) named price as the main driver.

WHAT WAS THE MAIN DRIVER IN YOUR DECISION TO CHANGE RETAILERS?
(n=492)



Reasons for Not Taking out a Contract

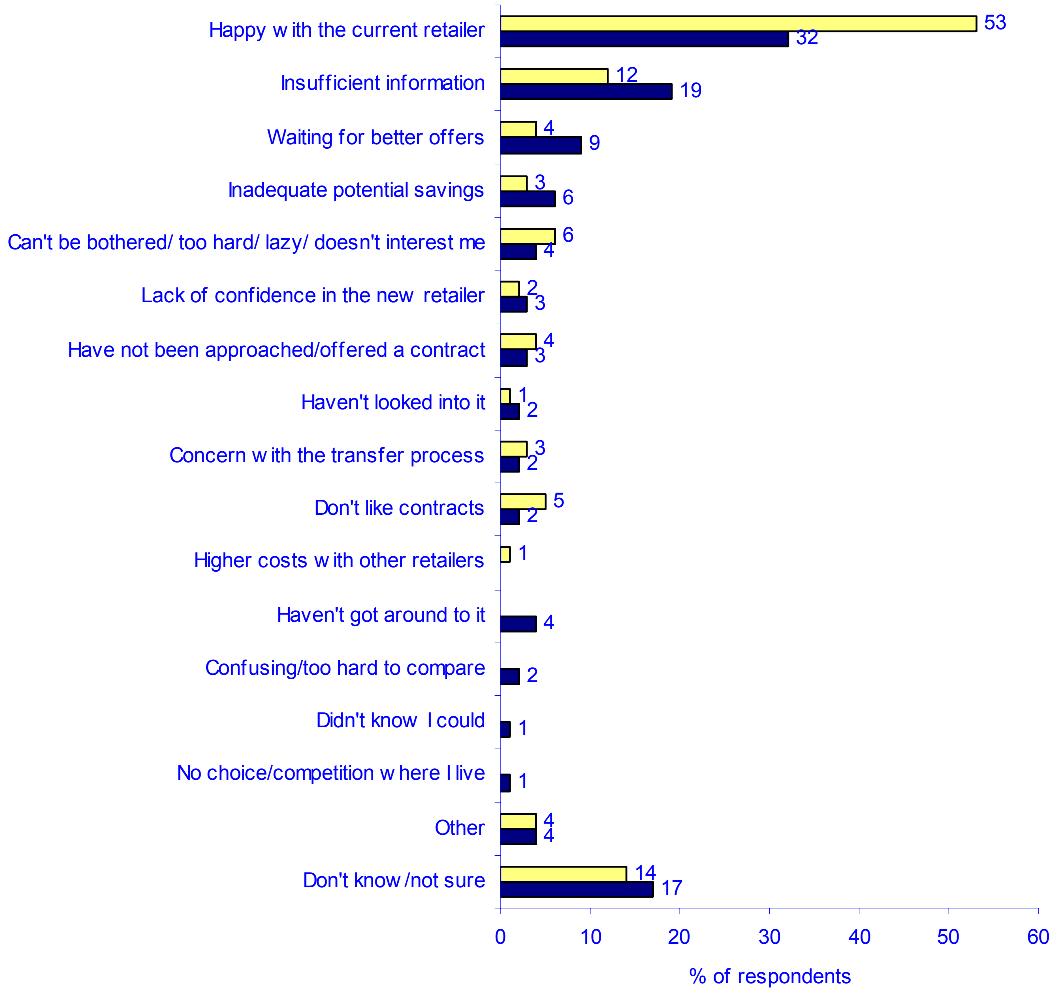
3.6.16 Those who had not taken out a contract were asked why they had not done so.

3.6.17 For those who had not taken out a contract, the main reason given by residents was that they were happy with their current retailer (53%, up from 32% in 2004). Other reasons included:

- Insufficient information (12%, down from 19% in 2004)
- Cannot be bothered/ too hard/ lazy/ does not interest me (6%, up from 3% in 2004)
- Do not like contracts/ too binding/ want freedom to change (5%)
- Waiting for better offers (4%, down from 9% in 2004)
- Have not been offered a contract (4%, up from 3% in 2004)
- Inadequate potential savings (3%, down from 6% in 2004)
- Concern with the transfer process (3%, up from 2% in 2004)

3.6.18 In relation to the main response, those more likely to indicate that they were happy with their current retailer included those not in paid work (60%), those aged 65 plus (68%), those receiving an electricity concession (61%), and those in the defined low income segment (56%).

WHY HAVEN'T YOU TAKEN OUT A CONTRACT?



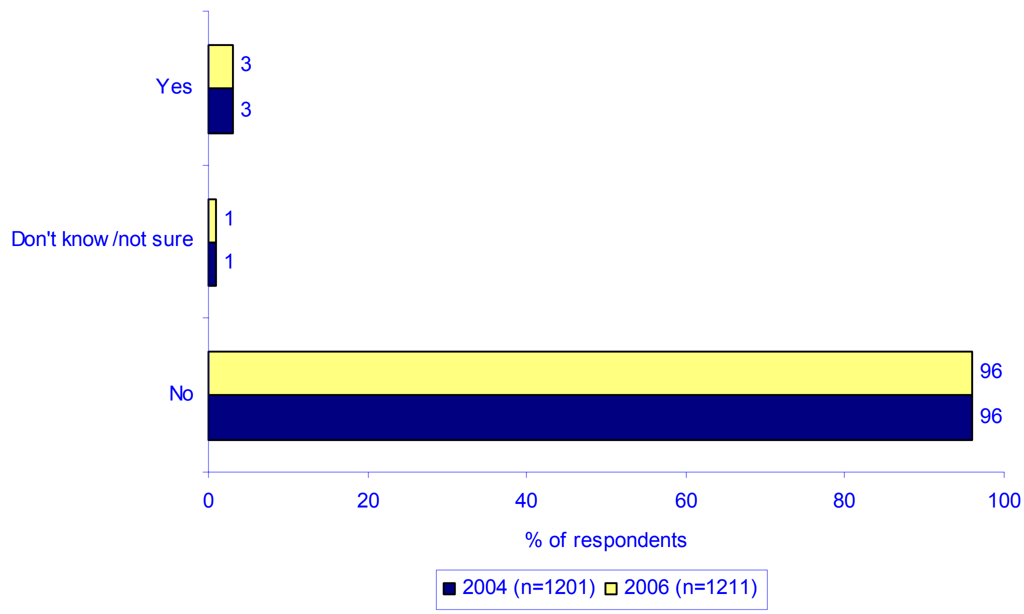
The Cooling Off Period

3.6.19 All respondents were asked if they, at any stage, had entered into a contract and used the cooling off period to cancel.

3.6.20 A very small proportion (3%) of those surveyed had entered into a contract and used the cooling off period to cancel, while the overwhelming majority (96%) had not.

3.6.21 There were few variances to these responses among the groups surveyed.

HAVE YOU, AT ANY STAGE, ENETERED INTO A CONTRACT AND USED THE COOLING OFF PERIOD TO CANCEL? (n=1211)



Likelihood of Taking out a Contract in the Next Twelve Months

3.6.22 All residents were then asked, in the next twelve months, how likely is it, that you will take out a contract with your current electricity supplier, or switch to another electricity retailer.

3.6.23 One in ten (11%, down from 23% in 2004) respondents indicated that they would be likely to take out a contract in the next twelve months.

3.6.24 Almost three quarters (73%) indicated they would be unlikely to do so, a significantly higher proportion than the 2004 survey (51%). The scaled responses were as follows:

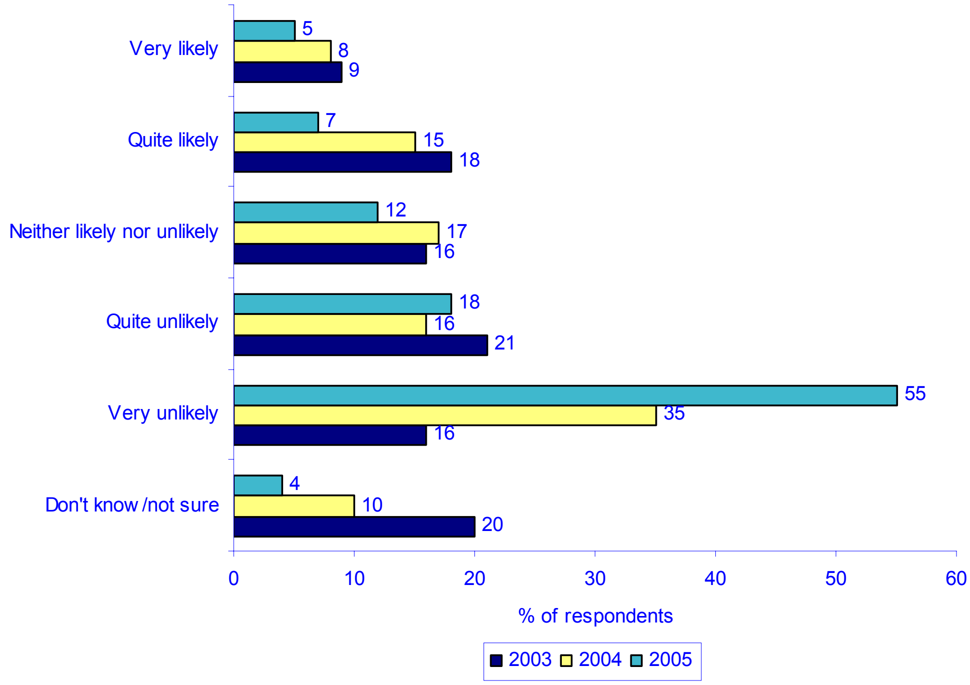
- Very likely (5%, down from 8% in 2004)
- Quite likely (7%, up from 5% in 2004)
- Neither likely nor unlikely (12%, down from 17% in 2004)
- Quite unlikely (18%, up from 16% in 2004)
- Very unlikely (55%, up from 35% in 2004)
- Do not know/not sure (4%, down from 10% in 2004)

3.6.25 Those who were more likely to indicate that they would take out a contract in the next twelve months included:

- Those earning between $75,001 to $100,000 per annum (17%) and those earning more than $100,000 per annum (22%)
- Those aged 18 to 39 (15%)
- Those in paid work (14%), particularly professionals/executives (22%)
- Those not receiving an energy concession (13%)

3.6.26 Conversely, a higher proportion of those in the defined low income segment (78%) were more likely to indicate that it was unlikely that they would be taking out a contract with their current electricity supplier in the next twelve months.

IN THE NEXT TWELVE MONTHS, HOW LIKELY IS IT THAT YOU WILL TAKE OUT A CONTRACT WITH YOUR CURRENT ELECTRICITY SUPPLIER OR SWITCH TO ANOTHER ELECTRICITY RETAILER? (n=1211)



3.7 Important Factors in Switching Retailers

3.7.1 Respondents were asked to rate, on a scale of 1 to 5, where 5 is very important and 1 is not at all important, the importance of a number of factors in relation to the decision to switch retailers. It is generally considered that an average rating of 3.5 is important, 4.0 is very important and 4.5 or above is extremely important.

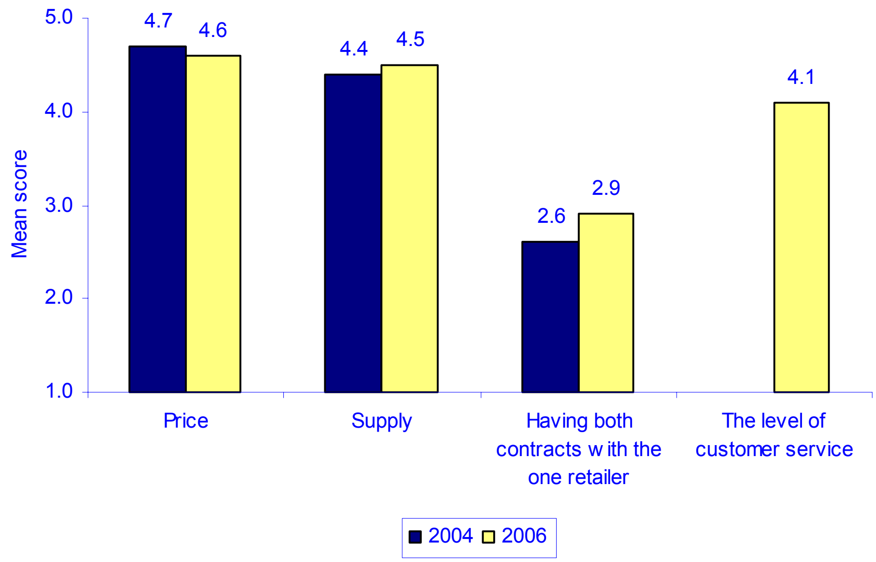
3.7.2 Based on these parameters, there was an extremely high level of importance attributed to price, supply and the level of customer service, and a relatively low level of importance attributed to having both contracts with the one retailer.

3.7.3 The level of customer service was also asked for the first time, results suggesting that this aspect is of very high importance. These responses were similar for both electricity and gas retailers, as outlined:

- Price - average rating (electricity 4.6, down from 4.7 in 2004)
- Supply - average rating (4.5, up from 4.4 in 2004)
- The level of customer service – average rating (4.1)
- Having both contracts with the one supplier - average rating (2.9, up from 2.6 in 2004)

3.7.4 These responses were relatively consistent across all groups surveyed.

ON A SCALE OF 1 TO 5, WHERE 5 IS VERY IMPORTANT AND 1 IS NOT AT ALL IMPORTANT, PLEASE RATE THE IMPORTANCE OF THE FOLLOWING IN RELATION TO THE DECISION TO SWITCH RETAILERS? (n=1211)



3.8 Information

Incidence of Looking for Information

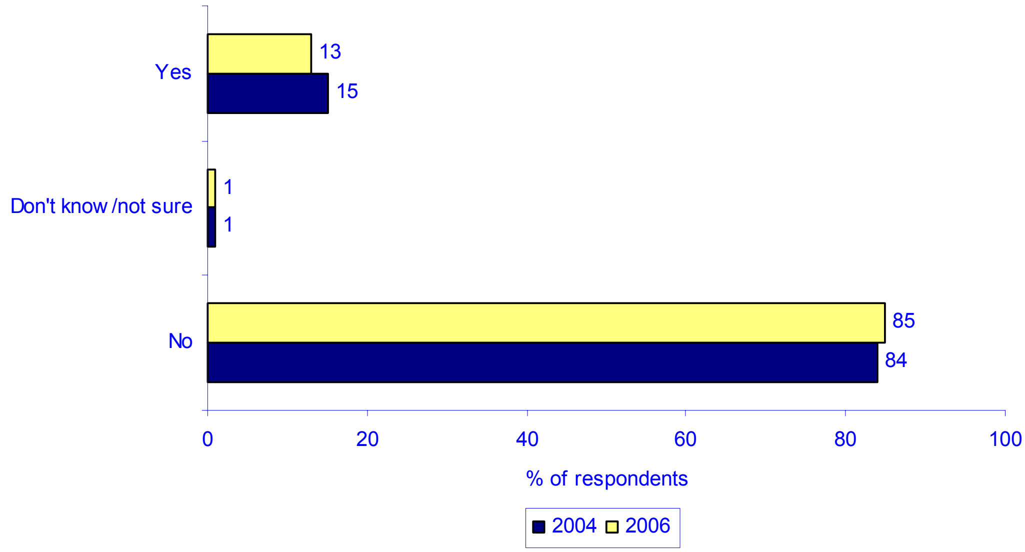
3.8.1 Those surveyed were asked if they had looked for any information to assist them in making a decision about moving to a market contract with an electricity supplier, whether they had taken out a contract or not.

3.8.2 A relatively small proportion (13%, down from 15% in 2004) of those surveyed indicated that they had looked for information to assist them in making a decision about moving to a market contract with an electricity supplier, compared to 85% who had not (up from 84% in 2004).

3.8.3 Those who were more likely to have looked for information included those who were employed as professionals/executives (22%), those who had taken out a contract with an electricity retailer (18%) and those who received an offer of a contract from an electricity retailer (17%).

3.8.4 Conversely, those living in regional South Australia (88%), those classified as single/ living on their own (90%) and blue collar workers (90%) were less likely to have not looked for this information.

HAVE YOU LOOKED FOR ANY INFORMATION TO ASSIST YOU IN MAKING A DECISION ABOUT MOVING TO A MARKET CONTRACT WITH AN ELECTRICITY SUPPLIER, WHETHER YOU HAVE TAKEN OUT A CONTRACT OR NOT? (n=1211)



Sources of Information

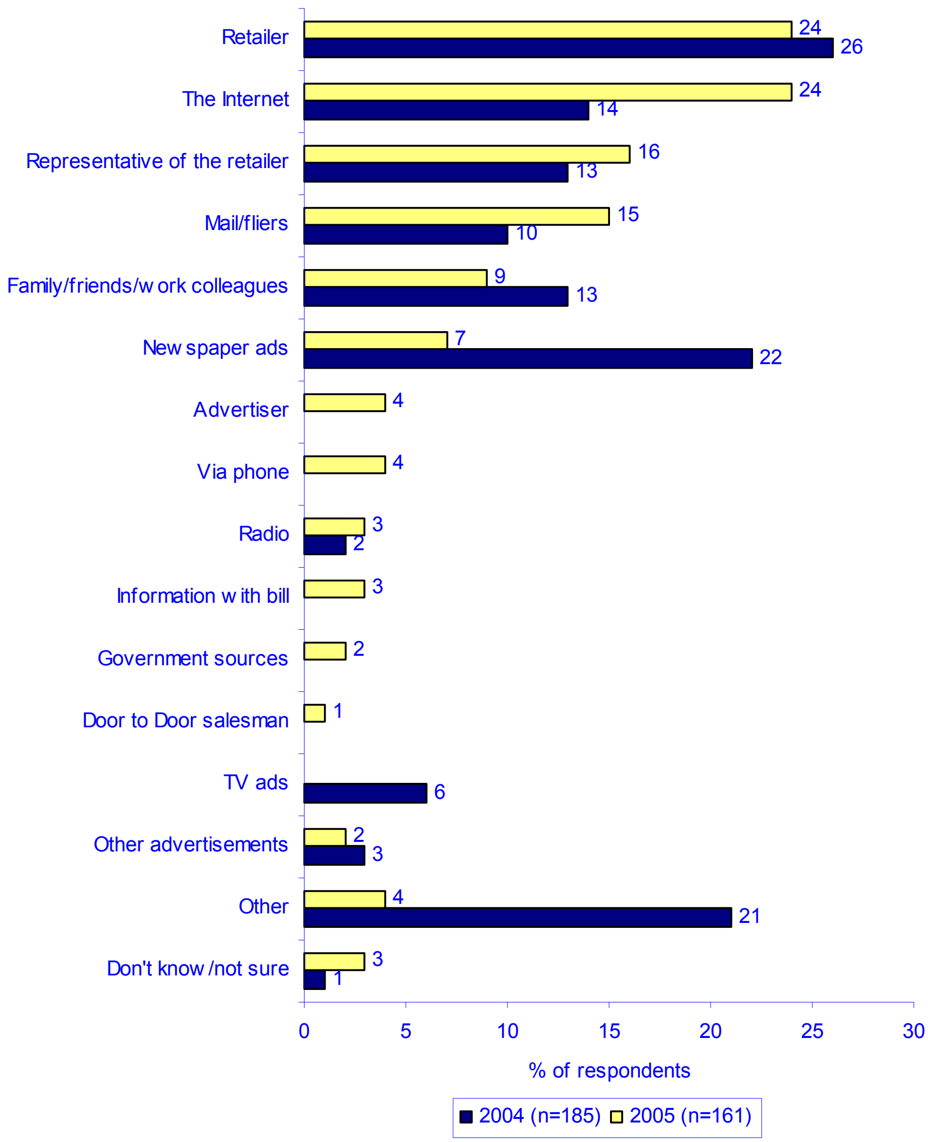
3.8.5 Those who had looked for information to assist the decision making process were asked what was the source of their information.

3.8.6 A number of sources of information were identified amongst this group, including:

- The retailer (24%, up from 26% in 2004)
- The Internet (24%, up from 14% in 2004)
- Representatives of the retailer (16%, up from 13% in 2004)
- Brochures/flyers/ pamphlets (15%, up from 10% in 2004)
- Newspaper advertisements (11%, down from 22% in 2004)
- Friends/family/ work colleagues (9%, down from 13% in 2004)

3.8.7 There were few variances to these responses among the groups surveyed, although a higher proportion of those who had received an offer of a contract from an electricity retailer (30%) named the retailer and those defined as low income were more inclined to specify friends/ family/ work colleagues (21%).

WHAT WAS THE SOURCE OF THIS INFORMATION?



Ease of Obtaining Information

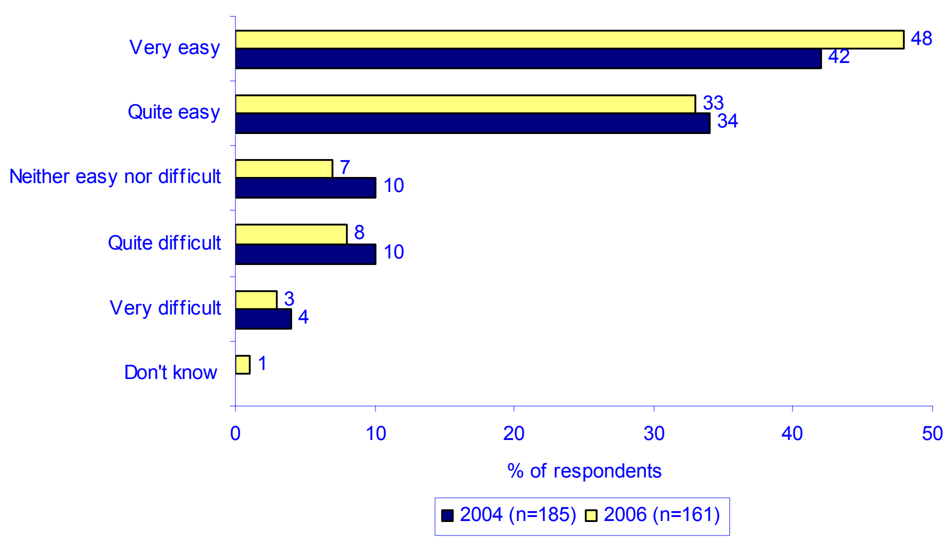
3.8.8 Those who had looked for information to assist in the decision making process were asked to rate, on a 5 point scale, where 1 is very easy and 5 is very difficult, how easy was it to obtain the information.

3.8.9 More than three quarters (81%, up from 76% in 2004) of these respondents indicated that the information was easy to obtain. The scaled responses were:

- Very easy (48%, up from 42% in 2004)
- Quite easy (33%, down from 34% in 2004)
- Neither easy nor difficult (7%, down from 10% in 2004)
- Quite difficult (8%, down from 10% in 2004)
- Very difficult (3%, down from 4% in 2004)

3.8.10 There were few variances to these responses among the groups surveyed, although higher proportions of those who had taken out a contract with an electricity retailer (87%) indicated that it was easy to obtain the information.

HOW EASY WAS IT TO OBTAIN THE INFORMATION?



Ease of Understanding the Information and Comparing Offers

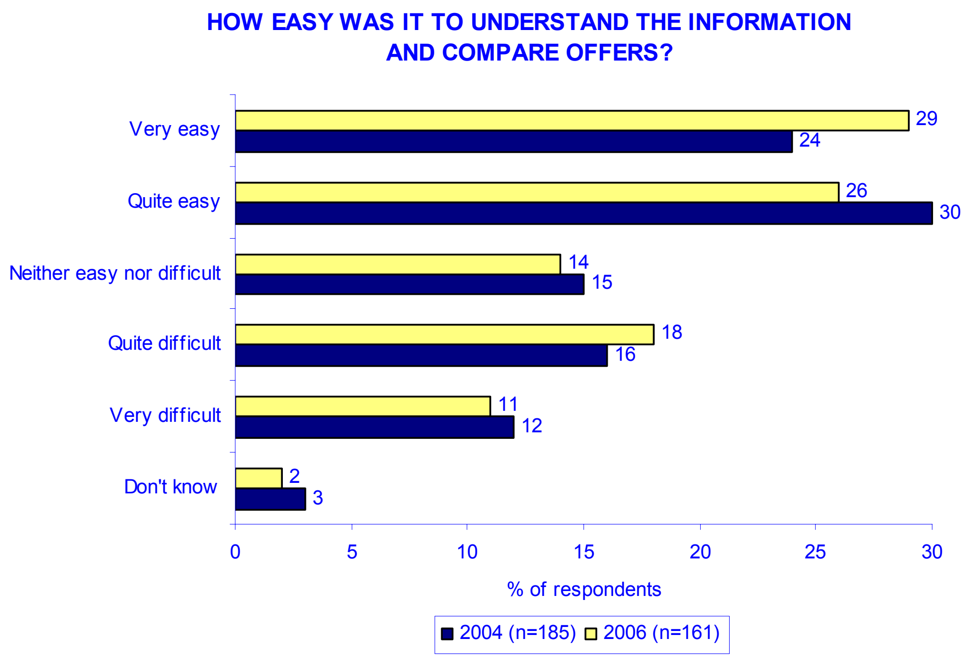
3.8.11 Those who had looked for information to assist the decision making process were asked to rate, on a 5 point scale, where 1 is very easy and 5 is very difficult, how easy was it to understand the information and compare offers.

3.8.12 There was a mixed response to this question. While more than half (55%, up from 54% in 2004) indicated that it was easy to understand the information and compare offers, more than a quarter (29%, unchanged from 2004) did not consider this to be the case.

3.8.13 The scaled responses were:

- Very easy (29%, up from 24% in 2004)
- Quite easy (26%, up from 30% in 2004)
- Neither easy nor difficult (14%, down from 15% in 2004)
- Quite difficult (18%, up from 16% in 2004)
- Very difficult (11%, down from 12% in 2004)

3.8.14 There were few variances to these responses among the groups surveyed, although those who had taken out a contract with an electricity retailer (62%) were more likely to indicate that it was easy to understand the information and compare offers.

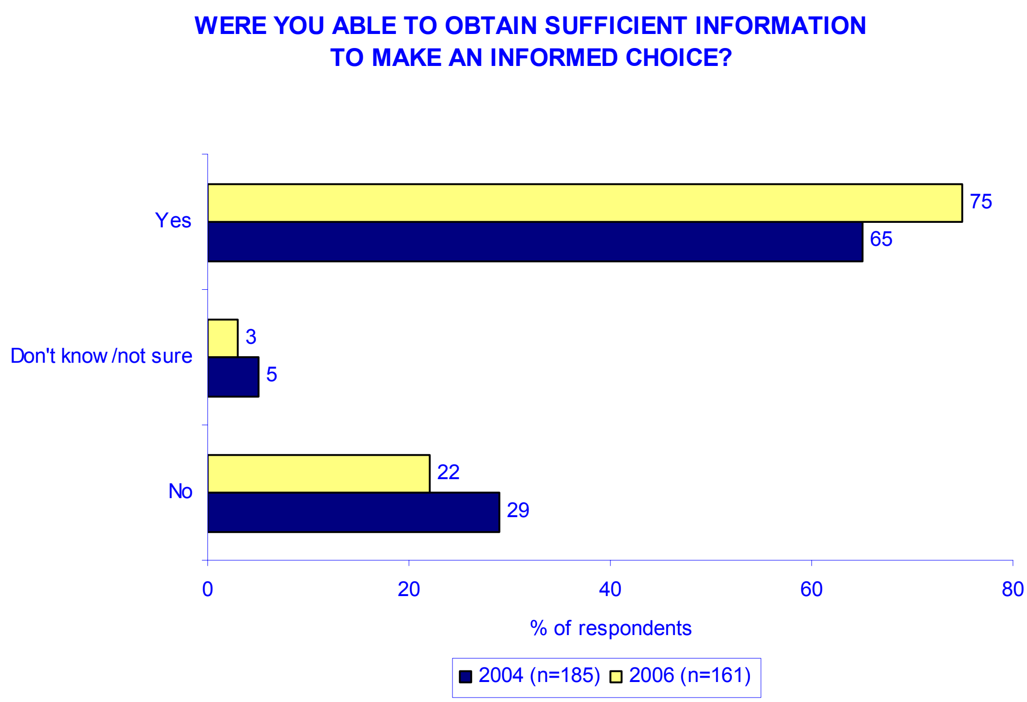


Ability to Make an Informed Choice

3.8.15 Those who had looked for information to assist the decision making process were then asked if they were able to obtain sufficient information to make an informed choice.

3.8.16 There was a high proportion (75%, up from 65% in 2004) who indicated that they were able to obtain sufficient information to make an informed choice. This compares to 22% (down from 29% in 2004) who indicated that they could not.

3.8.17 There were few variances to these responses among the groups surveyed, although higher proportions of those who had taken out a contract with an electricity retailer (88%) and those who had received an offer of a contract from an electricity retailer (81%) indicated that they were able to obtain sufficient information to make an informed choice.



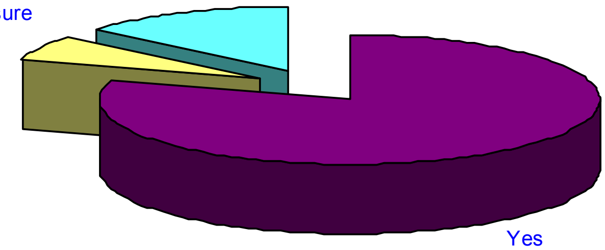
Importance of the Information in Making a Choice

3.8.18 Those who had looked for information to assist the decision making process were then asked if the information provided was important to them in making their decision to switch retailers.

3.8.19 The vast majority (80%) of residents considered this information to be important in making their decision to switch retailers. This compared to 14% who did not.

3.8.20 There were few variances to these responses among the sub groups, although higher proportions of those who had taken out a contract with an electricity retailer (93%) and those who had received an offer of a contract from an electricity retailer (89%) indicated that they considered the information important in making their decision. This was in contrast to those defined as the low income sub group, who were more inclined to consider the information was not important (26%).

WAS THIS INFORMATION IMPORTANT TO YOU IN MAKING YOUR DECISION TO SWITCH RETAILERS?
(n=161)



3.9 Understanding Electricity Bills

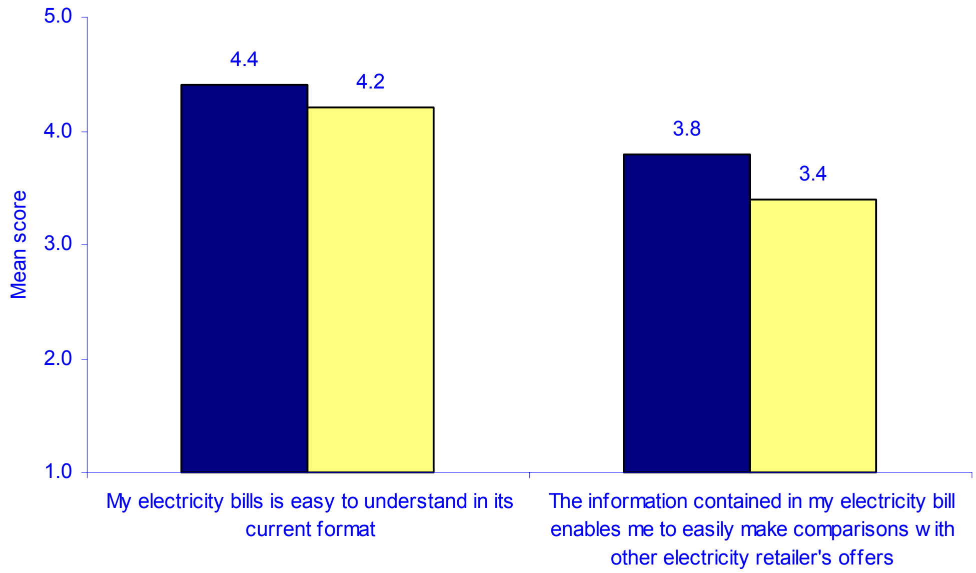
3.9.1 Respondents were asked to rate, on a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, their level of agreement with these statements in relation to understanding electricity bills. It is generally considered that an average rating of 3.5 represents a reasonably high level of agreement, 4.0 a very high level of agreement and 4.5 or above an extremely high level of agreement.

3.9.2 Based on these parameters there was a high level of agreement that electricity bills are easy to understand, with an average rating of 4.2.

3.9.3 There was a lower level of agreement (slightly mixed with some respondents agreeing and some disagreeing) with the statement that the information contained in electricity bills enables comparisons with other retailer's offers, with an average rating of 3.4

3.9.4 These ratings were relatively consistent across all groups surveyed.

ON A SCALE OF 1 TO 5, WHERE 5 IS VERY IMPORTANT AND 1 IS NOT AT ALL IMPORTANT, PLEASE RATE IMPORTANCE OF THE FOLLOWING IN RELATION TO THE EASE OF UNDERSTANDING YOUR ELECTRICITY BILLS? (n=1201)



Section 4
Gas

This Section outlines the key findings of the Gas Research. For further analysis by age, gender, occupation, household composition etc. please refer to the Computer Tabulations.

4.1 Gas Consumption

4.1.1 Those surveyed were asked what was their approximate average consumption of gas, as represented by their average quarterly bill.

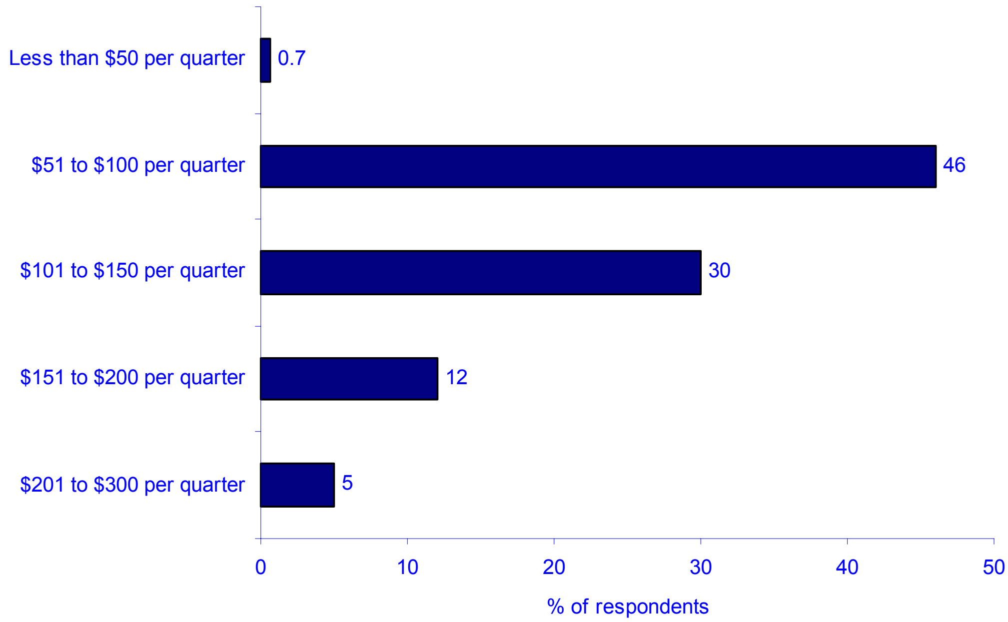
4.1.2 The majority (76%, up from 67% in 2004) of residents indicated that their quarterly gas bills were in the range from $51 to $150 per quarter, as outlined below:

- Less than $50 per quarter (7%, up from 4% in 2004)
- $51 to $100 per quarter (46%, up from 38% in 2004)
- $101 to $150 per quarter (30%, up from 29% in 2004)
- $151 to $200 per quarter (12%, down from 17% in 2004)
- $201 to $300 per quarter (5%, down from 11% in 2004)

4.1.3 The main variances to these responses related to those whose quarterly bills were in the range from $51 to $100 per quarter, with higher proportions of the following groups having gas bills within that range:

- One person households (67%)
- Those earning less than $15,000 per annum (69%)
- Retired people (58%)
- Those aged 65 plus (60%)
- Those in the defined low income segment (54%)
- Those not in paid work (55%)
- Those receiving an energy concession (56%)

WHAT IS YOUR APPROXIMATE AVERAGE CONSUMPTION OF GAS AS REPRESENTED BY YOUR AVERAGE QUARTERLY BILL? (n=579)



4.2 Awareness of Choice of Gas Retailer

4.2.1 Respondents were initially read two statements and asked to indicate which they thought to be correct. These statements were:

- I can choose my own gas retailer now
- I am obliged to purchase gas from my existing retailer

4.2.2 More than three quarters (79%, up from 78% in 2004) of those surveyed were aware of their ability to choose their own gas retailer now. This compares to just 13% (up from 11% in 2004) who thought that they were obliged to purchase gas from their existing retailer. A further 8% (down from 10% in 2004) indicated that they did not know or were not sure.

4.2.3 Not surprisingly, those who had received an offer of a contract from a gas retailer (81%) were more likely to indicate that they could choose their own gas retailer now.

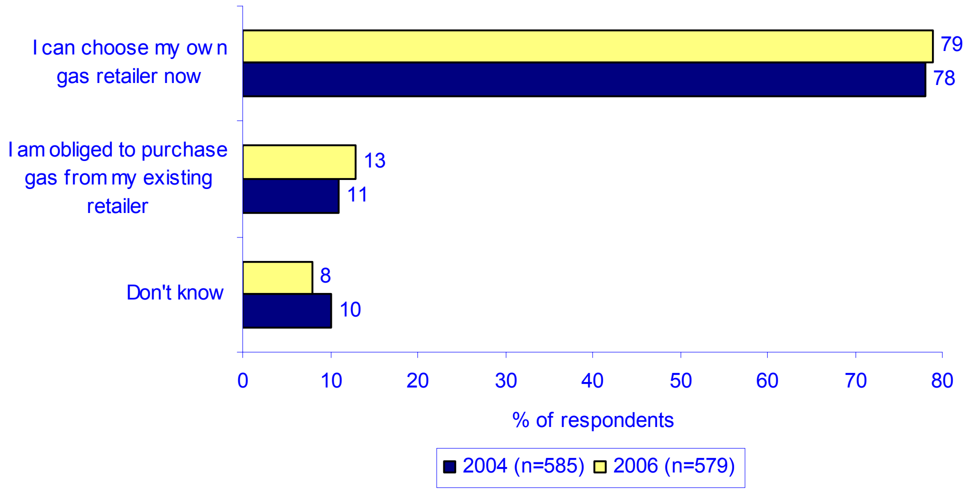
4.2.4 The following groups also recorded higher incidences of indicating they could choose their own gas retailer:

- Those aged 18-39 years (90%)
- Those in paid work (83%) and in particular those classified as white collar (85%)

4.2.5 Those in regional South Australia (69%, compared to those from metropolitan Adelaide, 80%) were less likely to indicate that they could now choose their own gas retailer.

4.2.6 Those earning less than $15,000 per annum (69%) were also less likely to be aware of their ability to choose their own retailer now.

AS FAR AS YOU ARE AWARE, WHICH OF THE FOLLOWING APPLIES?



4.3 Gas Retailers

Gas Retailers Currently Used

4.3.1 Those surveyed were asked from which company they currently purchased their gas.

4.3.2 Origin was named by 60% (down from 81% in 2004) of respondents as the retailer they currently purchase their gas from. The other companies named were:

- AGL (20%, up from 13% in 2004)
- TXU (9%, up from 3% in 2004)
- Energy Australia (6%, not named in 2004)

4.3.3 Higher proportions of those who had taken out a contract with a gas retailer, named AGL, TXU and Energy Australia. Those who had received an offer of a contract from a gas retailer recorded higher incidences of naming TXU and Energy Australia.

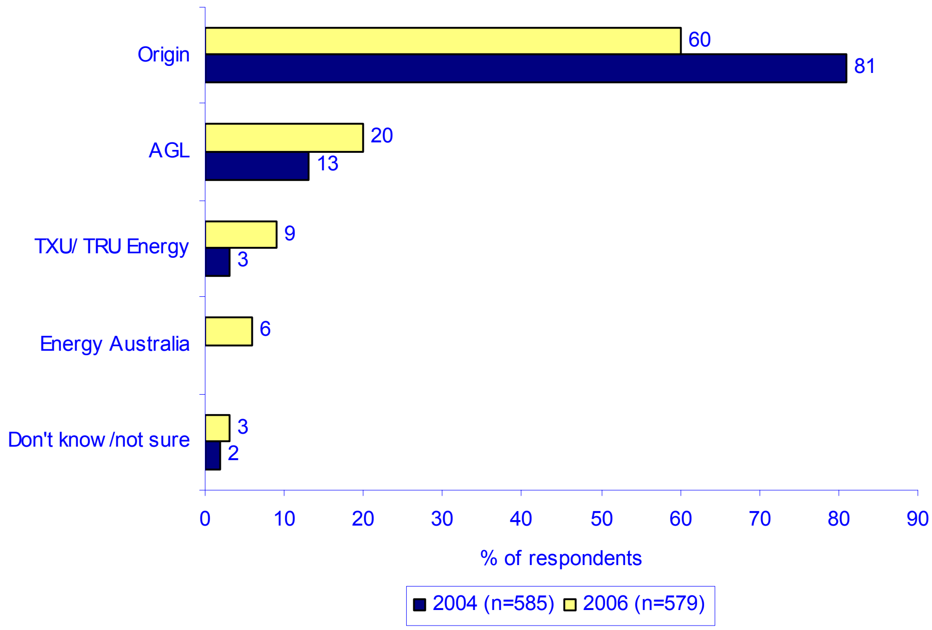
4.3.4 Higher proportions of those who have **not** taken out a contract with a gas retailer (75%) or received an offer of contract from a gas retailer (66%) named Origin.

4.3.5 Those aged 18 to 39 recorded higher incidence of naming Origin (69%), while those aged 40 plus were more likely to name AGL (23%).

4.3.6 Those in paid work were more likely to name Origin (69%), while higher proportions of those not in paid work named AGL (28%).

4.3.7 Those receiving an energy concession were more likely to name AGL (29%) as were those classified as low income earners (29%).

WHICH COMPANY DO YOU CURRENTLY BUY GAS FROM?



Gas Retailers which could be Used

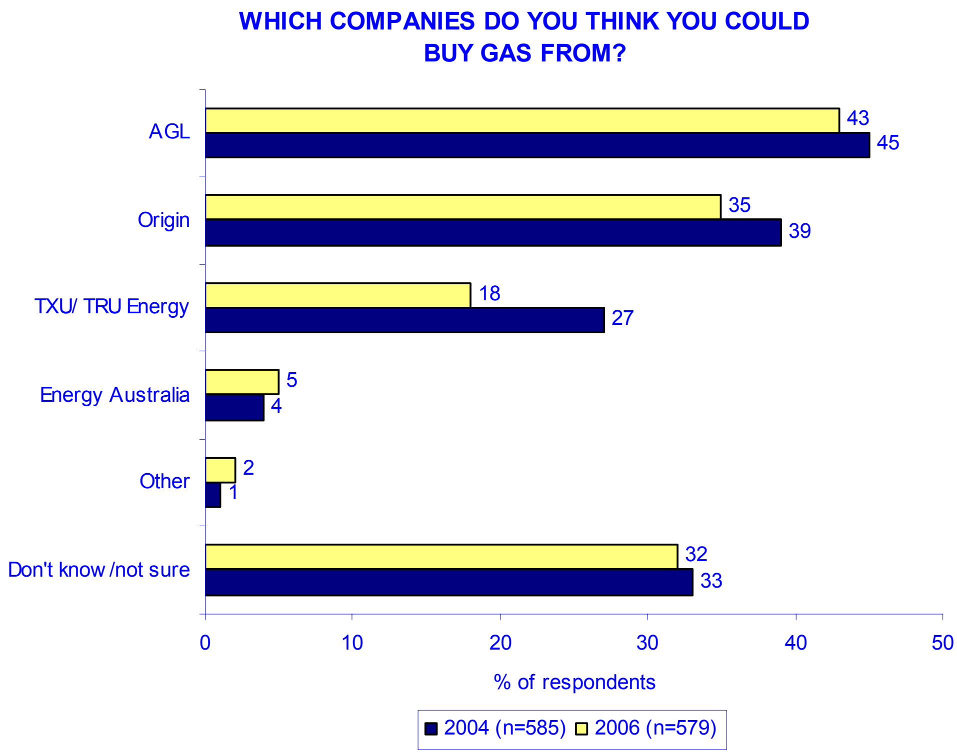
4.3.8 Respondents were then asked to identify the companies from which they could buy gas.

4.3.9 Three main companies were named, those being:

- Origin (43%, up from 39% in 2004)
- AGL (35%, down from 45% in 2004)
- TXU (18%, down from 27% in 2004)

4.3.10 Energy Australia (5%, up from 4% in 2004) was again also named by a small proportion of those surveyed.

4.3.11 Further, higher proportions of those who had taken out a contract with a gas retailer named Origin (51%), AGL (41%) and TXU (23%).



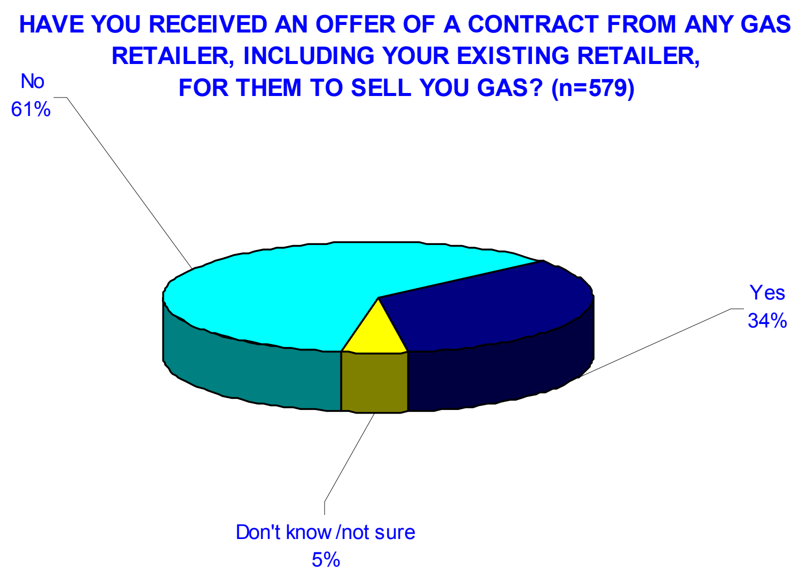
WHICH COMPANIES DO YOU THINK YOU COULD
BUY GAS FROM?
AGL
43
45
Origin
35
39
TXU/ TRU Energy
18
27
Energy Australia
5
4
Other
2
1
Don't know /not sure
32
33
0
10
20
30
40
50
% of respondents
2004 (n=585)
2006 (n=579)

4.4 Offers of Contract

Incidence of Receiving an Offer of an Gas Contract

4.4.1 Those surveyed were asked if they had received an individual offer of a contract from any gas retailer, including their existing retailer, to sell them gas.

4.4.2 One third of residents (34%, up from 20% in 2004) had received an offer of a contract from a gas retailer, compared to 61% who had not.



Gas Retailer from Whom the Offer was Received

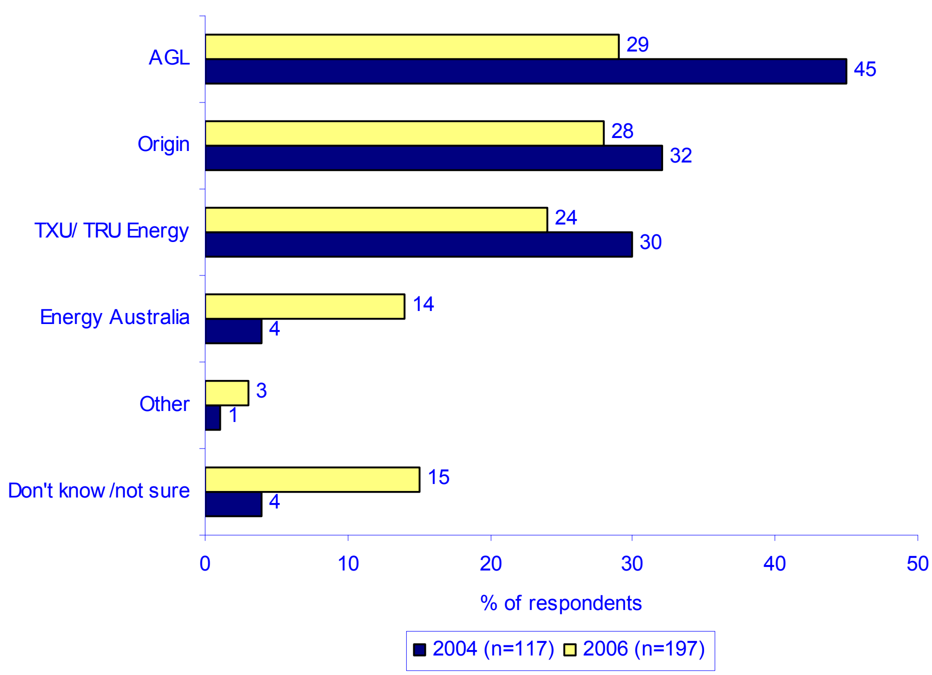
4.4.3 Those who had received an offer of a contract were asked which retailer(s) they had received such an individual offer from.

4.4.4 The main companies named from which contract offers had been received were:

- Origin (29%, down from 32% in 2004)
- AGL (28%, down from 45% in 2004)
- TXU (24%, down from 30% in 2004)
- Energy Australia (14%, up from 5% in 2004)

4.4.5 Those in paid work (35%) were more likely to have named Origin, while a higher proportion of those from the defined low income group (37%) indicated they had received an offer from AGL.

WHICH RETAILER OF RETAILERS DID YOU RECEIVE SUCH AN OFFER FROM? ANY OTHERS?



Ease of Understanding the Offer

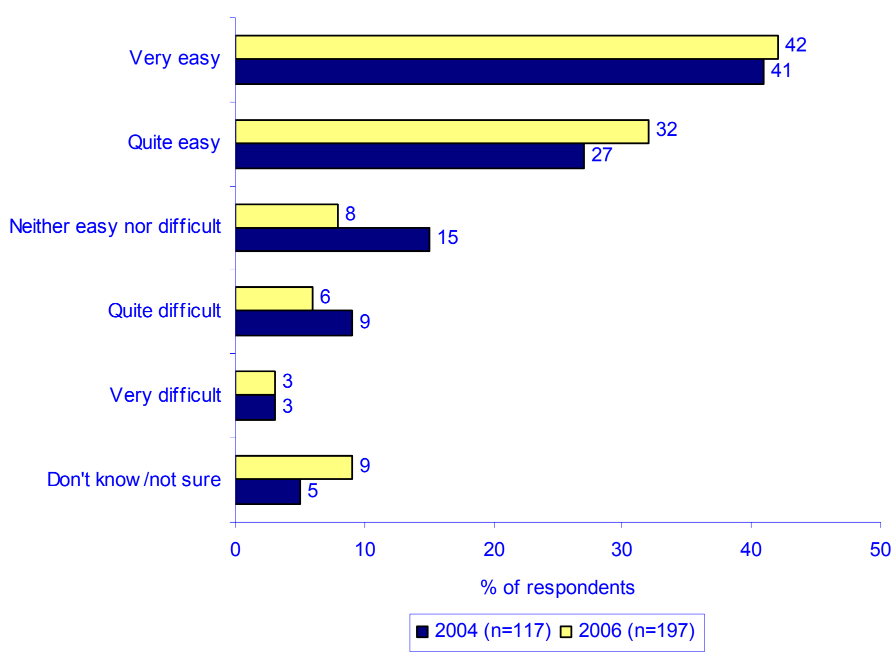
4.4.6 Those who had received an offer of a contract were asked how easy it was to understand the offer.

4.4.7 Three quarters (74%, up from 68% in 2004) of this group stated that the offer was easy to understand, compared to 9% (down from 12% in 2004) who indicated that it was not. The scaled responses were as follows:

- Very easy (42%, up from 41% in 2004)
- Quite easy (32%, up from 27% in 2004)
- Neither easy nor difficult (8%, down from 15% in 2004)
- Quite difficult (6%, down from 9% in 2004)
- Very difficult (3%, unchanged from 2004)

4.4.8 There were few variances to these responses among the groups surveyed, although a higher proportion of those who had taken out a contract with a gas retailer (80%) indicated that the offer was easy to understand.

HOW EASY WAS IT TO UNDERSTAND THE OFFER?



4.5 Approaching Gas Retailers

Incidence of Approaching Gas Retailers about Purchasing Gas

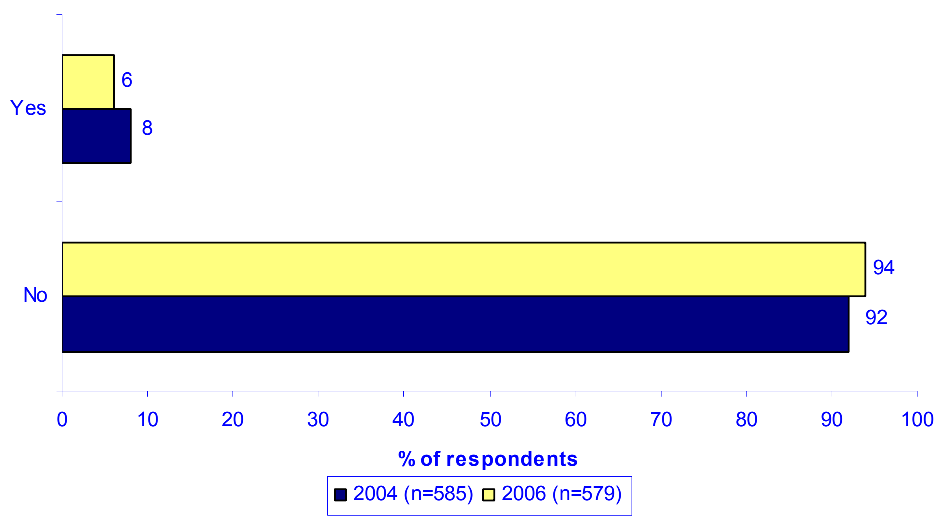
4.5.1 Respondents were asked if they had approached any gas retailer(s), including their existing retailer, to ask about buying gas from them.

4.5.2 The incidence of having approached gas retailers was low, with just 6% (down form 8% in 2004) of those surveyed indicating that they had done so. The overwhelming majority (94%, up from 92% in 2004) had not approached any gas retailers.

4.5.3 Those who were more likely to have approached any gas retailers included:

- Those who had taken out a contract with a gas retailer (9%)
- Those aged between 55 and 64 (11%)

HAVE YOU APPROACHED A GAS RETAILER OR RETAILERS, INCLUDING YOUR EXISTING RETAILER, TO ASK ABOUT BUYING GAS FROM THEM?



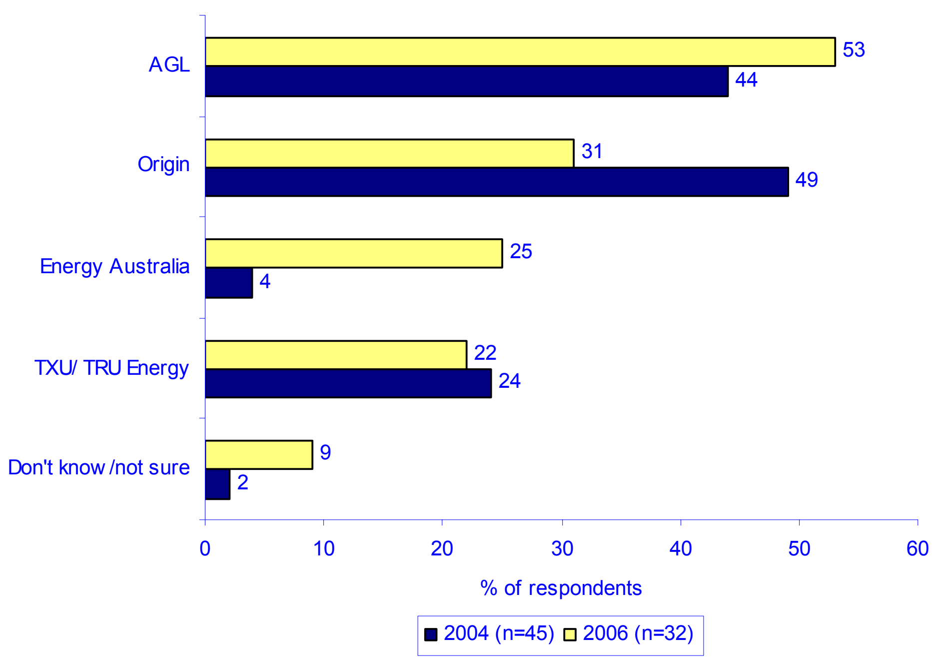
Gas Retailer that was Approached

4.5.4 Those who had approached a gas retailer were asked which retailer(s) they had approached.

4.5.5 AGL (53%, up from 44% in 2004), Origin (31%, down from 49% in 2004), Energy Australia (25%, up from 4% in 2004) and TXU (22%, down from 24% in 2004) were the main retailers that had been approached.

4.5.6 There were no variances to these responses among the groups surveyed.

WHICH REATILER OF RETAILERS DID YOU APPROACH? ANY OTHERS?

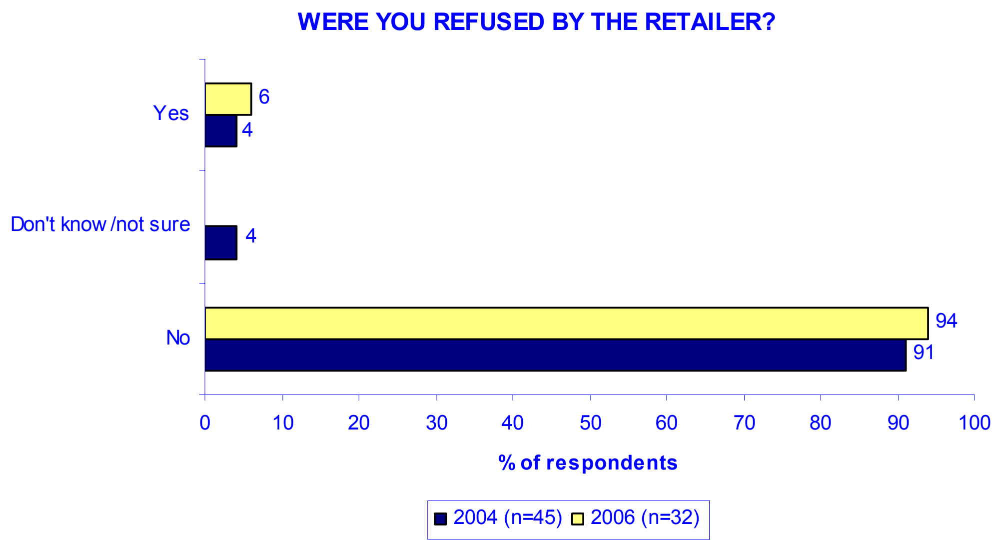


Incidence of Being Refused by the Gas Retailer

4.5.7 Those who had approached a gas retailer were asked if they were refused by the retailer.

4.5.8 Again, few 6% (compared to 4% in 2004), stated that they had been refused by the retailer, compared to 94% who had not.

4.5.9 There were no variances to these responses among the groups surveyed.



4.6 New Contracts

Incidence of Having Taken Out a Contract

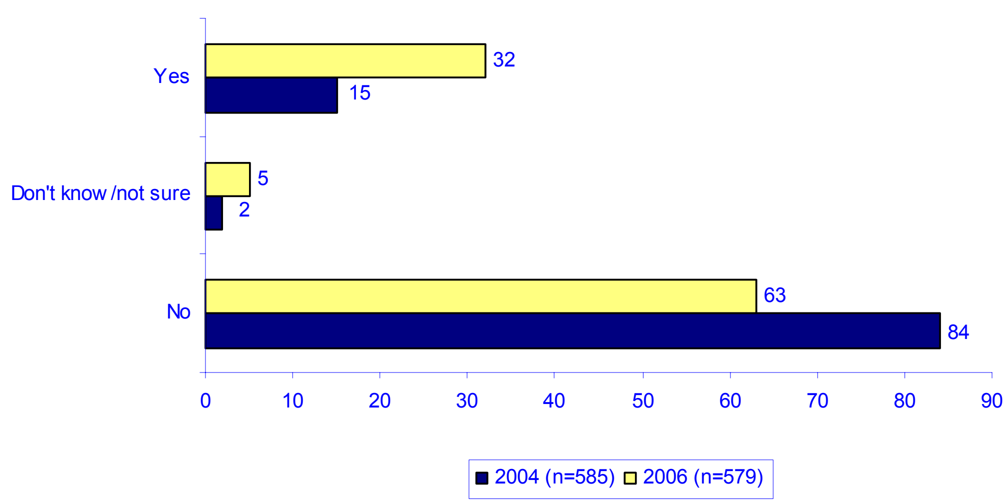
4.6.1 Those surveyed were asked if they had taken out a contract with a gas retailer.

4.6.2 One third (32%, up from 15% in 2004) of respondents indicated that they had taken out a contract with a gas retailer. This compares with 63% (down from 83% in 2004) who indicated that they had not done so.

4.6.3 There were higher incidences of having taken out a contract among the following groups:

- Those receiving an energy concession (36%)
- Those aged over 40 (34%) and, in particular, those aged 65 plus (40%)
- Those who are retired (40%)
- Those living in metropolitan Adelaide (34%)

HAVE YOU TAKEN OUT A CONTRACT WITH A GAS RETAILER?



Ease of the Transfer Process

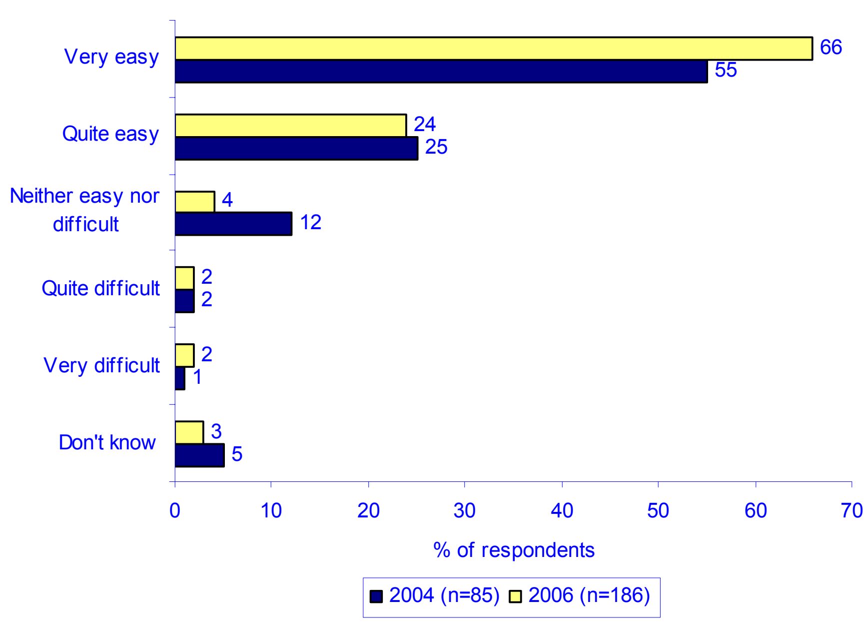
4.6.4 Those who had taken out a contract with a gas retailer were asked to rate, on a 5 point scale, where 1 is very easy and 5 is very difficult, how easy was the transfer process.

4.6.5 A very high proportion (90%, up from 80%) of these respondents indicated that the transfer process was easy. This compares to just 3% who considered this process to be difficult. The scaled responses were as follows:

- Very easy (66%, up from 55% in 2004)
- Quite easy (24%, down form 25% in 2004)
- Neither easy nor difficult (4%, down from 12% in 2004)
- Quite difficult (2% unchanged from 2004)
- Very difficult (2%, up from 1% in 2004)

4.6.6 There were few variances to these responses among the groups surveyed.

HOW EASY WAS THE TRANSFER PROCESS?



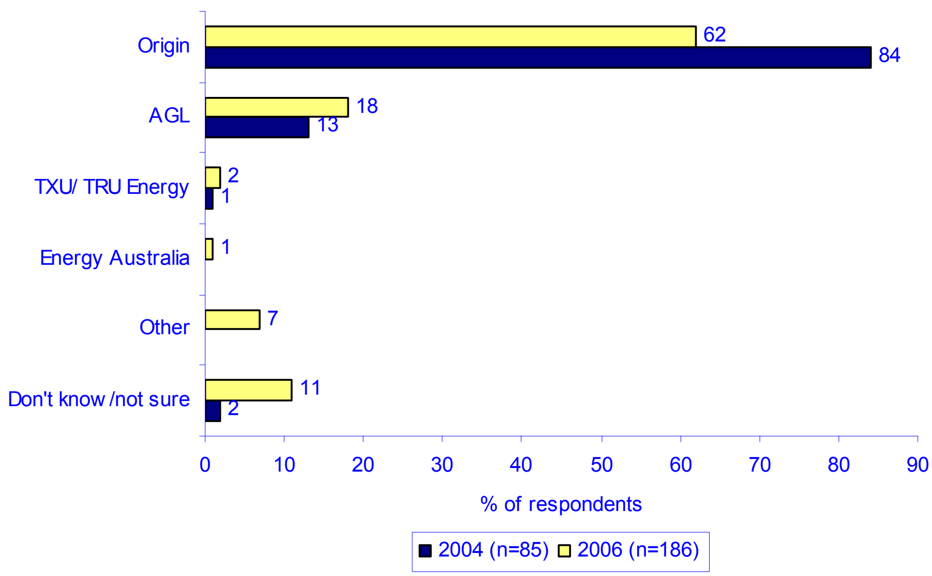
Previous Retailer

4.6.7 Those who had taken out a contract with a gas retailer were asked to name their old or previous retailer.

4.6.8 Most (62%, down from 84% in 2004) of these respondents named Origin as their previous retailer, while AGL (18%, up from 13% in 2004) was the second most common response. TXU (2%, up from 1% in 2004) and Energy Australia (1%, not named in 2004) were also mentioned.

4.6.9 There were no significant variances to these responses across all groups surveyed.

WHAT WAS THE NAME OF YOUR OLD OR PREVIOUS RETAILER?



Main Driver for Switching Retailers

4.6.10 Those who had taken out a contract were asked what was the main driver in their decision to change retailers.

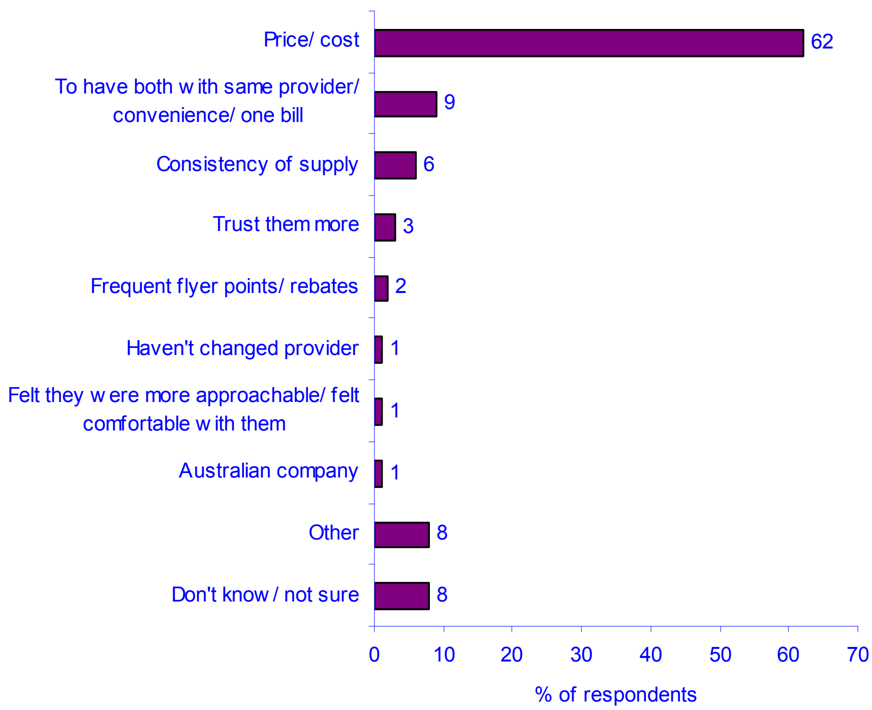
4.6.11 The main driver for the majority of respondents was price/ cost (62%).

4.6.12 Other drivers named included:

- To have both with same provider/ convenience/ one bill (9%)
- Consistency of supply (6%)

4.6.13 Few variances existed amongst the sub groups, however, those who had received an offer of contract from a gas retailer (68%) and those aged 55 to 64 (68%) showed higher incidences of naming price/ cost.

WHAT WAS THE MAIN DRIVER IN YOUR DECISION TO CHANGE RETAILERS?
(n=186)



Reasons for Not Taking out a Contract

4.6.14 Those who had not taken out a contract were asked why they had not done so.

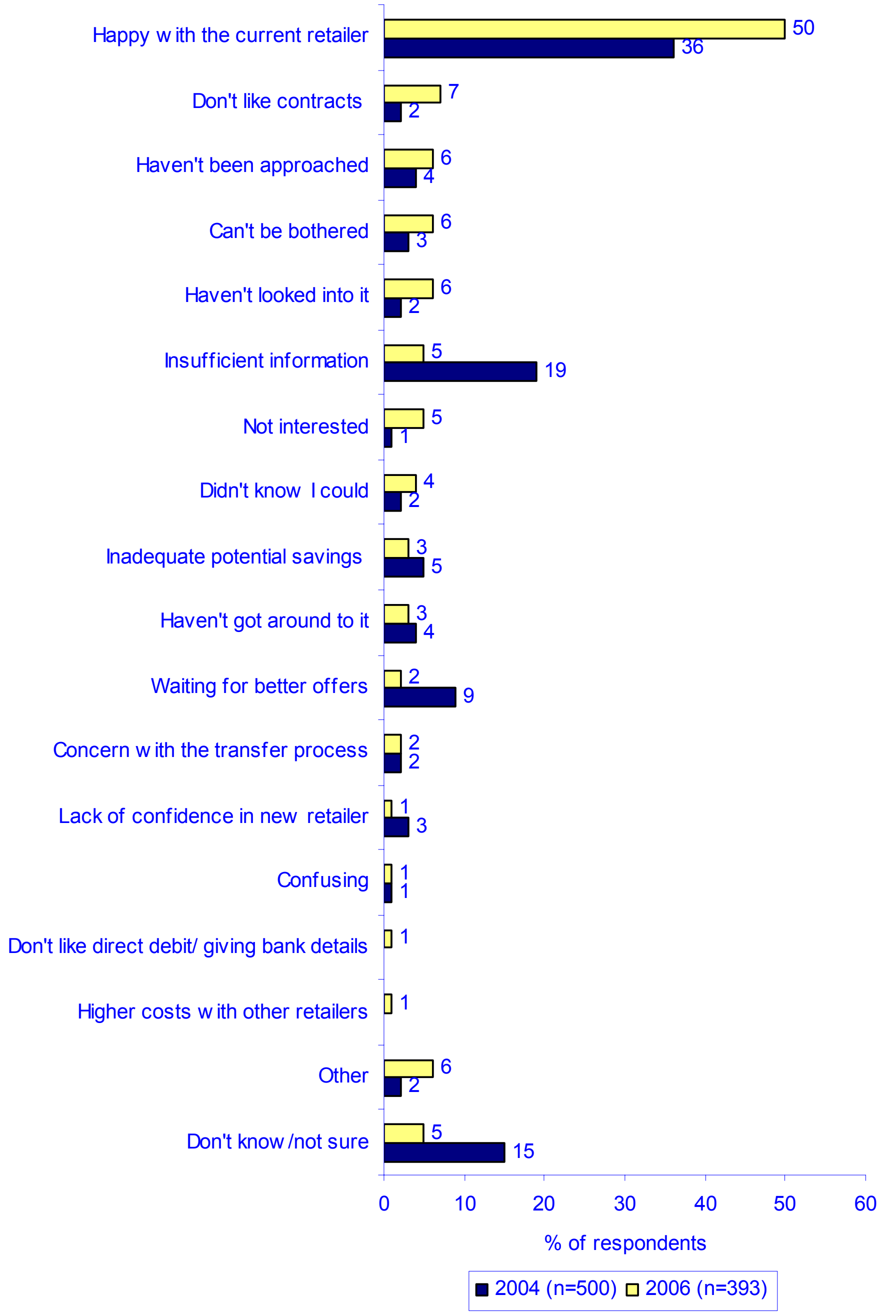
4.6.15 Half of those interviewed (50%) indicated that they were happy with their current retailer. The other main reasons named included:

- Do not like contracts/ do not want to be tied to anything (7%)
- Cannot be bothered/ laziness (6%)
- Have not been approached/ offered a contract (6%)
- Not interested/ do not care (5%)
- Insufficient information (5%)

4.6.16 There were higher proportions of those living in Metropolitan Adelaide (51%), those with a household income of $25,001 to $35,000 per annum (63%) and those defined as low income (56%) who indicated that they were happy with their current retailer.

4.6.17 Those living in regional areas were more inclined to state they have not taken out a contract due to insufficient information (15%).

WHY HAVEN'T YOU TAKEN OUT A CONTRACT?

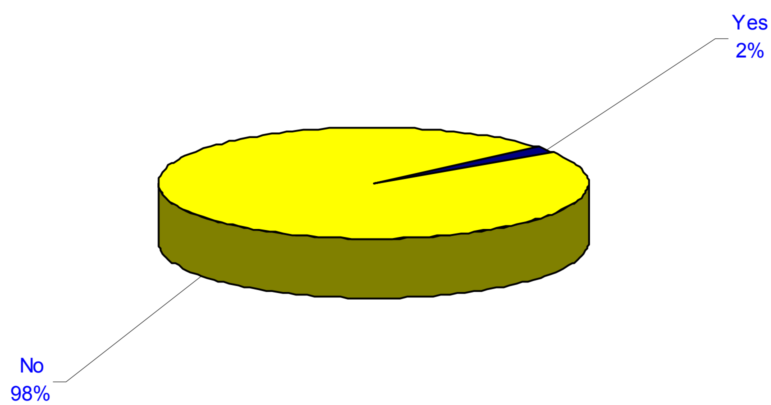


The Cooling Off Period

4.6.18 All respondents were asked if they, at any stage, had entered into a contract and used the cooling off period to cancel.

4.6.19 Just 2% of those surveyed indicated that they had done so, compared to 98% who had not. There has been practically no change from the 2004 result (1% yes, 99% no).

HAVE YOU, AT ANY STAGE, ENTERED INTO A CONTRACT AND USED THE COOLING OFF PERIOD TO CANCEL? (n=579)



Likelihood of Taking out a Contract in the Next Twelve Months

4.6.20 Those surveyed were then asked, in the next twelve months, how likely is it, that you will take out a contract with your current gas supplier, or switch to another gas retailer.

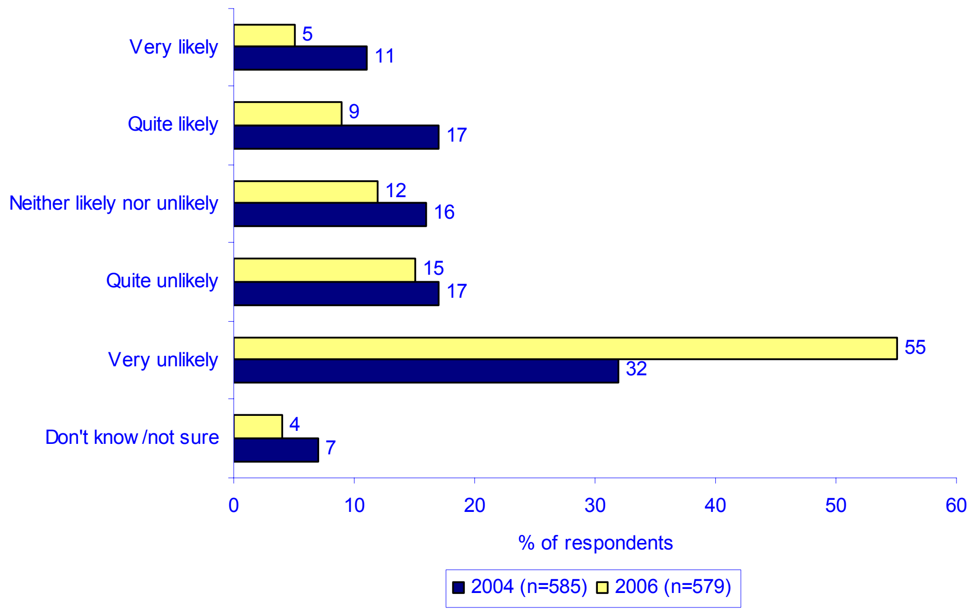
4.6.21 The majority (70%, up from 49% in 2004) of respondents stated that they would **not** be likely to take out a contract with a gas supplier in the next twelve months. This compared to 14% (down from 28% in 2004) who indicated that they would be likely to do so.

4.6.22 The scaled responses were as follows:

- Very likely (5%, down from 11% in 2004)
- Quite likely (9%, down from 17% in 2004)
- Neither likely nor unlikely (12%, down from 16% in 2004)
- Quite unlikely (15%, down from 17% in 2004)
- Very unlikely (55%, up from 32% in 2004)

4.6.23 Those who had already taken out a contract with a gas retailer (19%), those aged 55 to 64 (22%), males (19%) and those in paid work (17%) were more inclined to indicate they would be likely to take out a contract in the next twelve months.

IN THE NEXT TWELVE MONTHS, HOW LIKELY IS IT THAT YOU WILL TAKE OUT A CONTRACT WITH YOUR CURRENT GAS SUPPLIER OR SWITCH TO ANOTHER GAS RETAILER?



4.7 Important Factors in Switching Retailers

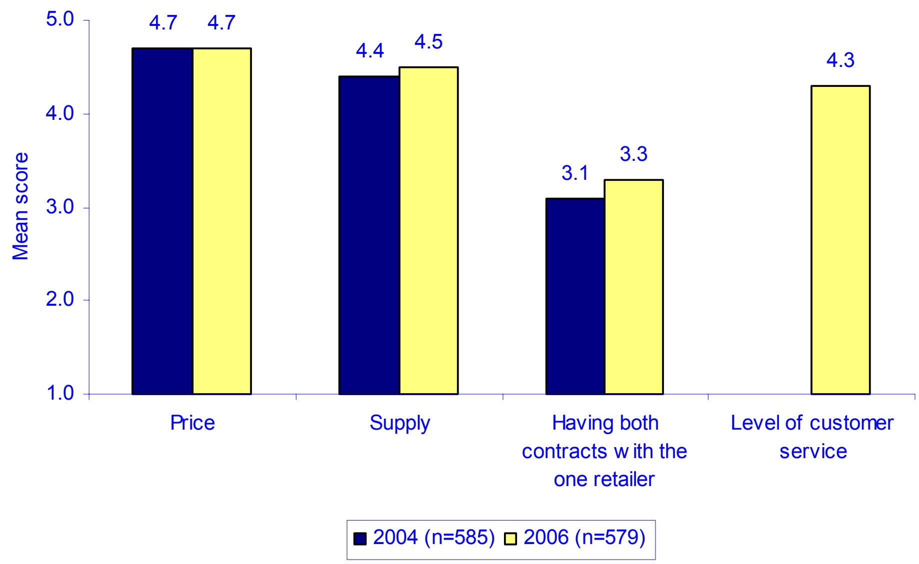
4.7.1 Respondents were asked to rate, on a scale of 1 to 5, where 5 is very important and 1 is not at all important, the importance of a number of factors in relation to the decision to switch retailers. It is generally considered that an average rating of 3.5 is important, 4.0 is very important and 4.5 or above is extremely important.

4.7.2 Based on these parameters, there was an extremely high level of importance attributed to price, very high levels of importance attributed to supply and customer service, and a lower level of importance attributed to having both contracts with the one retailer, as outlined:

- Price - average rating (4.7 unchanged from 2004)
- Supply - average rating (4.5, up from 4.4 in 2004)
- Level of customer service – average rating (4.3)
- Having both contracts with the one supplier - average rating (3.3, up from 3.1 in 2004)

4.7.3 These responses were relatively consistent across all groups surveyed, however those who had taken out a contract with a gas retailer rated having both contracts with the one retailer higher (average rating 4.0).

ON A SCALE OF 1 TO 5, WHERE 5 IS VERY IMPORTANT AND 1 IS NOT AT ALL IMPORTANT, PLEASE RATE THE IMPORTANCE OF THE FOLLOWING IN RELATION TO THE DECISION TO SWITCH RETAILERS?



4.8 Information

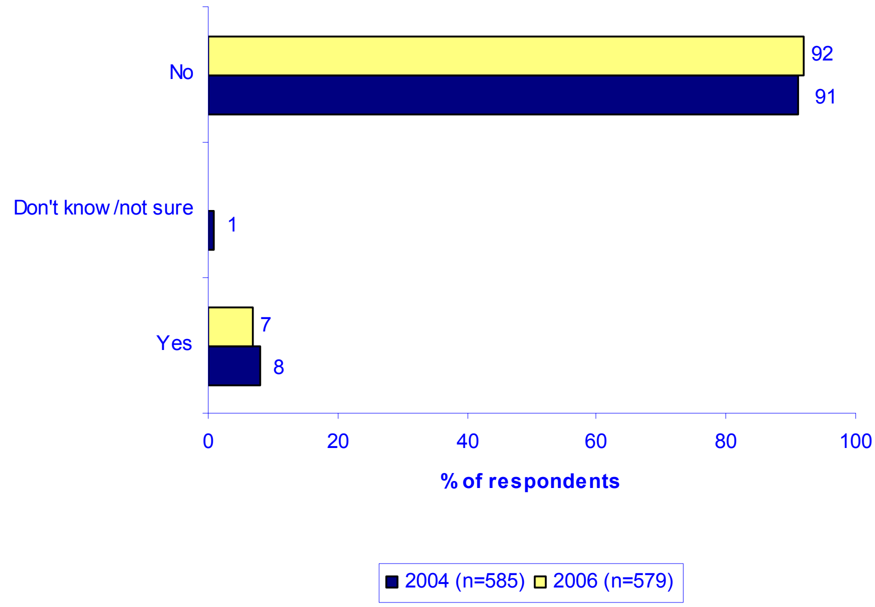
Incidence of Looking for Information

4.8.1 Those surveyed were asked if they had looked for any information to assist them in making a decision about moving to a market contract with a gas supplier, whether they had taken out a contract or not.

4.8.2 A relatively small proportion of respondents (7%, down from 8% in 2004) indicated that they had looked for such information, compared to most (92%, up from 91% in 2004) who had not.

4.8.3 There were higher proportions of those who had taken out a contract with a gas retailer (11%) and those who had received an offer of a contract from a gas retailer (13%) who had looked for information to assist in making a decision. Likewise, those in paid work (10%), in particular, those in professional/ executive occupations (14%) were also more likely to have sought information.

HAVE YOU LOOKED FOR ANY INFORMATION TO ASSIST YOU IN MAKING A DECISION ABOUT MOVING TO A MARKET CONTRACT WITH A GAS SUPPLIER, WHETHER YOU HAVE TAKEN OUT A CONTRACT OR NOT?



Sources of Information

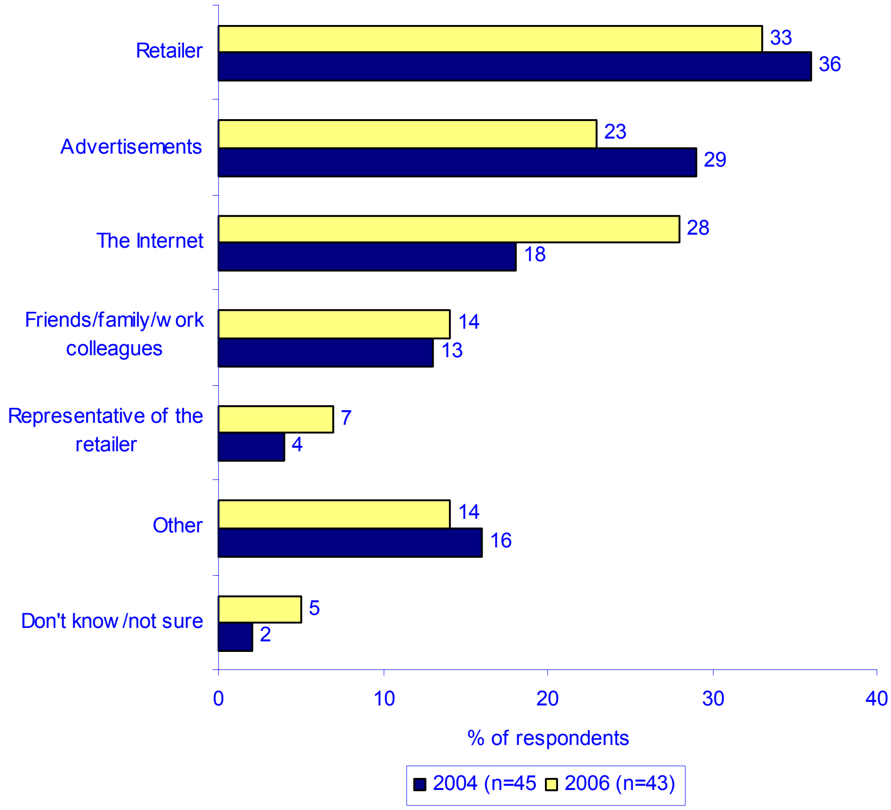
4.8.4 Those who had looked for information to assist the decision making process were asked what was the source of their information.

4.8.5 Among this small number of respondents, a number of sources were named, as outlined:

- The retailer (33%, up from 36% in 2004)
- The Internet (28%, up from 18% in 2004)
- Advertisements (23%, down from 29% in 2004)
- Family/friends/work colleagues (14%, up from 13% in 2004)
- Representatives of the retailer (7%, up from 4% in 2004)

4.8.6 There were no significant variances to these responses among the groups surveyed.

WHAT WAS THE SOURCE OF THIS INFORMATION?



Ease of Obtaining Information

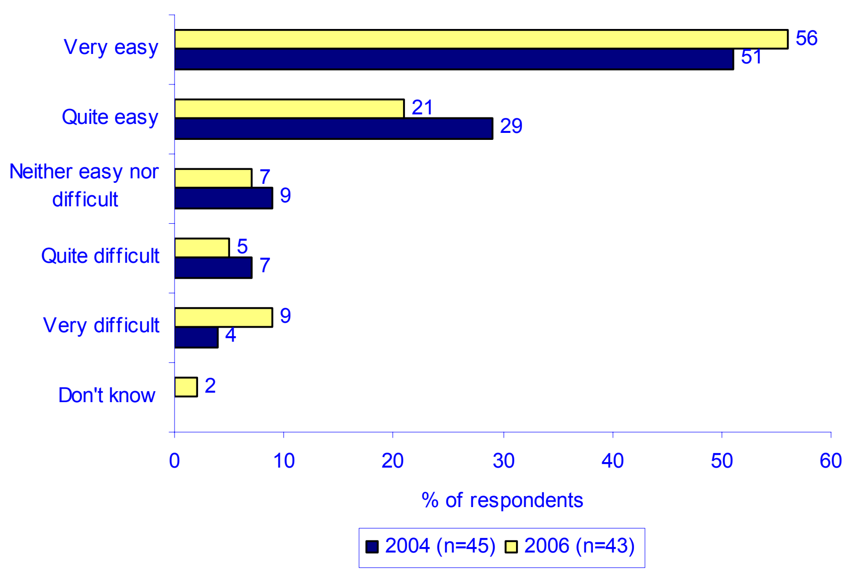
4.8.7 Those who had looked for information to assist the decision making process were asked to rate, on a 5 point scale, where 1 is very easy and 5 is very difficult, how easy was it was to obtain the information.

4.8.8 For the overwhelming majority (77%, down from 80% in 2004) of this group, the information was easy to find. The scaled responses were as follows:

- Very easy (56%, up from 51% in 2004)
- Quite easy (21%, down from 29% in 2004)
- Neither easy nor difficult (7%, down from 9% in 2004)
- Quite difficult (5%, down from 7% in 2004)
- Very difficult (9%, up from 4% in 2004)

4.8.9 There were no significant variances to these responses among the groups surveyed.

HOW EASY WAS IT TO OBTAIN THE INFORMATION?



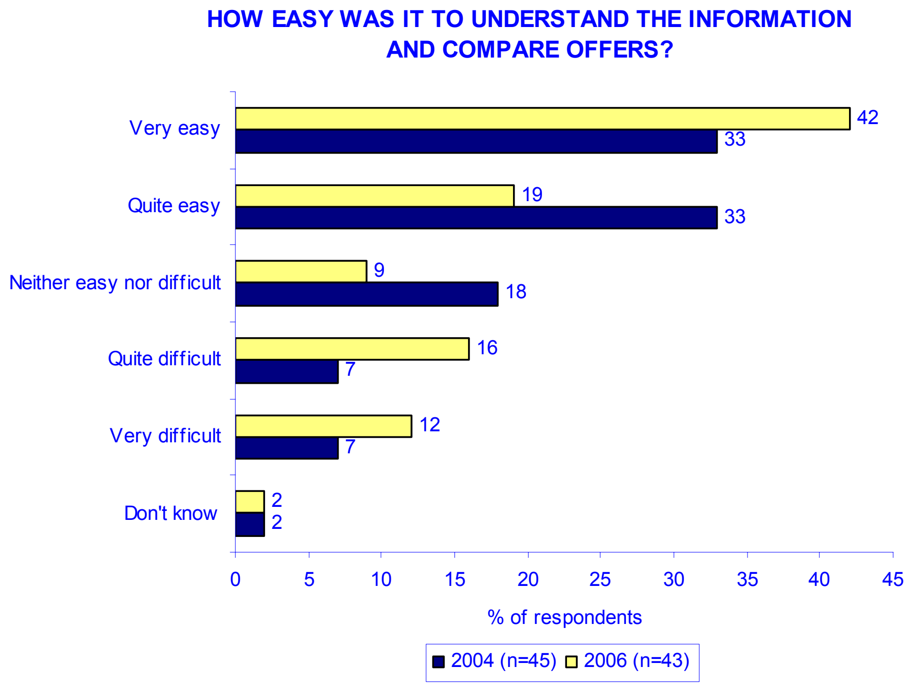
Ease of Understanding the Information and Comparing Offers

4.8.10 Those who had looked for information to assist the decision making process were asked to rate, on a 5 point scale, where 1 is very easy and 5 is very difficult, how easy was it to understand the information and compare offers.

4.8.11 A significant proportion (60%, down from 66% in 2004) of this group indicated that is was easy to understand the information and compare offers. This compares to 28% who considered it difficult to understand the information. The scaled responses were:

- Very easy (42%, up from 33% in 2004)
- Quite easy (19%, down from 33% in 2004)
- Neither easy nor difficult (9%, down from 18% in 2004)
- Quite difficult (16%, up from 7% in 2004)
- Very difficult (12%, up from 7% in 2004)

4.8.12 There were few significant differences to these responses, although those in the defined low income group exhibited a higher incidence of indicating that it was difficult to understand the information (36%).

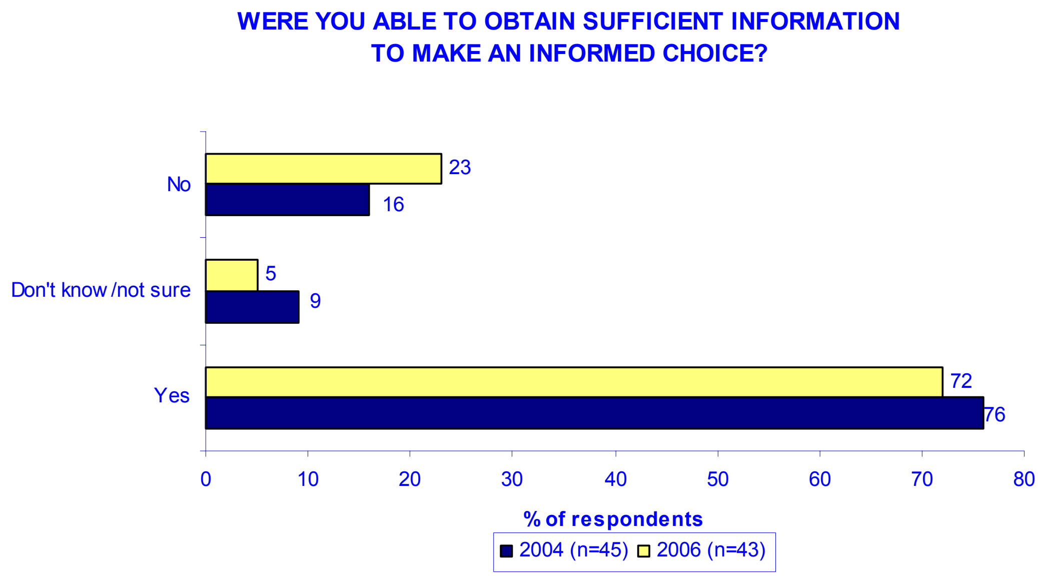


Ability to Make an Informed Choice

4.8.13 Those who had looked for information to assist the decision making process were then asked if they were able to obtain sufficient information to make an informed choice.

4.8.14 The majority (72%, down from 76% in 2004) indicated they were able to obtain sufficient information to make an informed choice, compared to 23% (up from 16% in 2004) who were not.

4.8.15 Again, there were no significant variances to these responses among the groups surveyed.

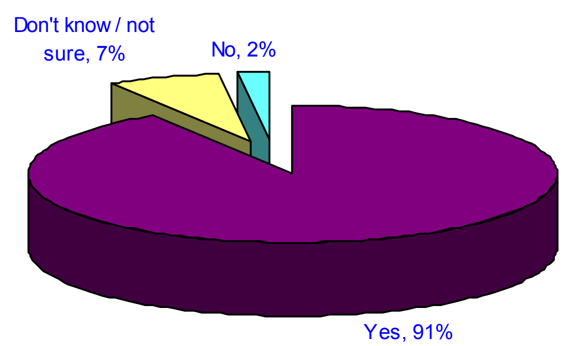


Importance of the Information in Making a Choice

4.8.16 Those who had looked for information to assist the decision making process were then asked if they considered the information provided as important for that process.

4.8.17 The overwhelming majority (91%) of these respondents considered this information to be important, compared to just 2% who did not. A further 7% were unsure.

WAS THIS INFORMATION IMPORTANT TO YOU IN MAKING YOUR DECISION TO SWITCH RETAILERS?
(n=43)



4.9 *Understanding Gas Bills*

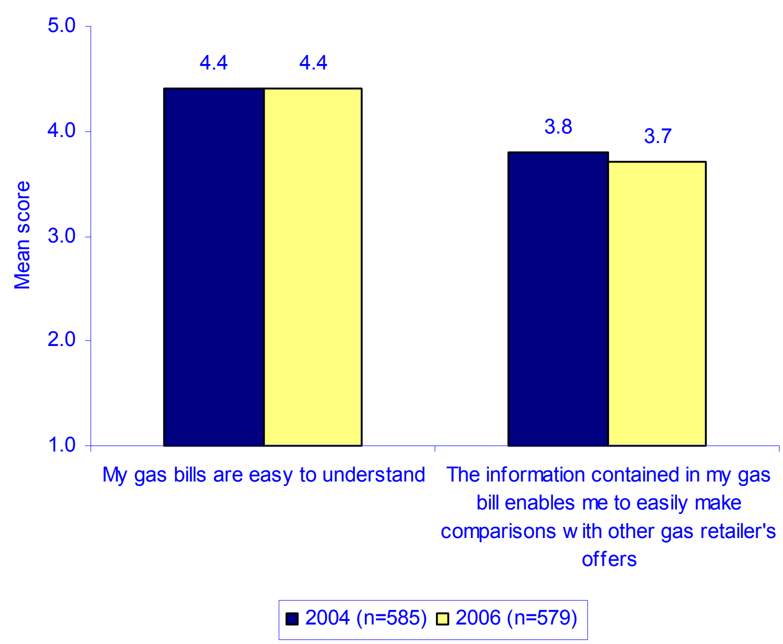
4.9.1 Those surveyed were read two statements relating to the format of gas bills and asked to rate, on a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, their level of agreement with these statements. It is generally considered that an average rating of 3.5 represents a reasonably high level of agreement, 4.0 a very high level of agreement and 4.5 or above an extremely high level of agreement.

4.9.2 There was a high level of agreement that gas bills in their current format are easy to understand – average rating of 4.4.

4.9.3 The statement that the information contained in gas bills enables easy comparisons with other gas retailer's offers was engendered a relatively high level of agreement, with an average rating of 3.7.

4.9.4 These ratings were relatively consistent across all groups surveyed.

ON A SCALE OF 1 TO 5, WHERE 5 IS VERY IMPORTANT AND 1 IS NOT AT ALL IMPORTANT, PLEASE RATE IMPORTANCE OF THE FOLLOWING IN RELATION TO THE EASE OF UNDERSTANDING YOUR GAS BILLS?



Section 5
Electricity & Gas

This Section outlines the key findings of the generic questions. For further analysis by age, gender, occupation, household composition etc. please refer to the Computer Tabulations.

5.1 Misleading and Deceptive Behaviour

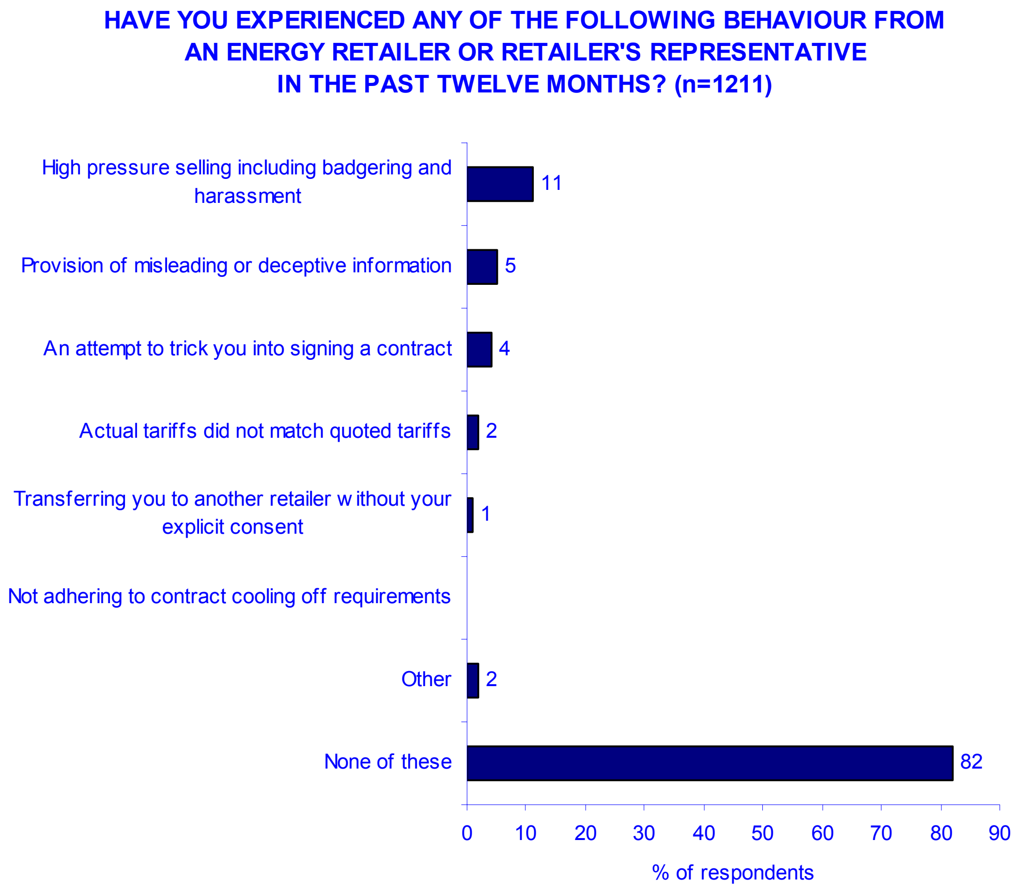
5.1.1 The incidence of having experienced misleading or deceptive behaviour from retailers was low. When read a number of statements relating to misleading and deceptive behaviour from energy retailers, the overwhelming majority (82%, down from 87% in 2004) of those surveyed indicated that they had not experienced any of this behaviour in the past twelve months.

5.1.2 Relatively small proportions of residents indicated that they had experienced a number of these types of behaviour, as outlined:

- High pressure selling including badgering and harassment (11%, up from 6% in 2004)
- Provision of misleading or deceptive information (5% unchanged from 2004)
- An attempt to trick you into signing a contract (4%, up from 3% in 2004)
- Actual tariffs did not match quoted tariffs (2% unchanged from 2004)
- Transferring you to another retailer without your explicit consent (1% unchanged from 2004)

5.1.3 There were few variances to these responses across the groups surveyed, however, in general, those who had received an offer of contract recorded higher incidences of this type of negative behaviour, as did those earning more than $100,000.

5.1.4 Those in professional/ executive occupations were more likely to indicate that they had experienced misleading or deceptive information (11%). Residents living in metropolitan Adelaide experienced more high pressure selling including badgering and harassment (14%).



5.2 Variety & Innovation of Offers

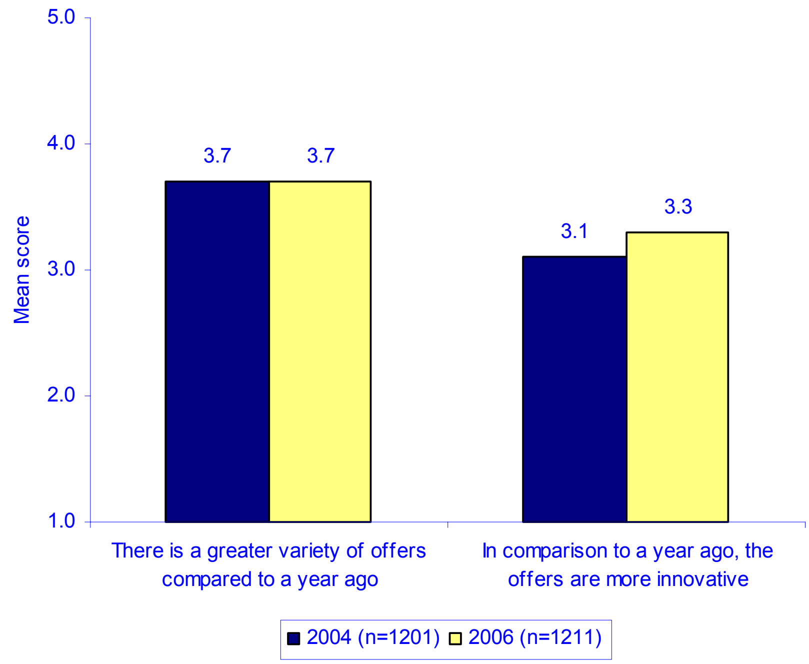
5.2.1 Those surveyed were read two statements relating to the variety and innovation of gas and electricity offers and asked to rate, on a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, their level of agreement with these statements. It is generally considered that an average rating of 3.5 represents a reasonably high level of agreement, 4.0 a very high level of agreement and 4.5 or above an extremely high level of agreement.

5.2.2 Based on these parameters, there was a reasonably high level of agreement that there is a greater variety of offers available compared to a year ago - average rating of 3.7, unchanged from 2004.

5.2.3 In relation to the offers of a year ago being more innovative, there was a mixed response, with an average rating of 3.3, up from 3.1 in 2004.

5.2.4 These responses were relatively consistent across all groups surveyed.

ON A SCALE OF 1 TO 5, WHERE 5 IS STRONGLY AGREE AND 1 IS STRONGLY DISAGREE, PLEASE RATE YOUR LEVEL OF AGREEMENT WITH THE FOLLOWING



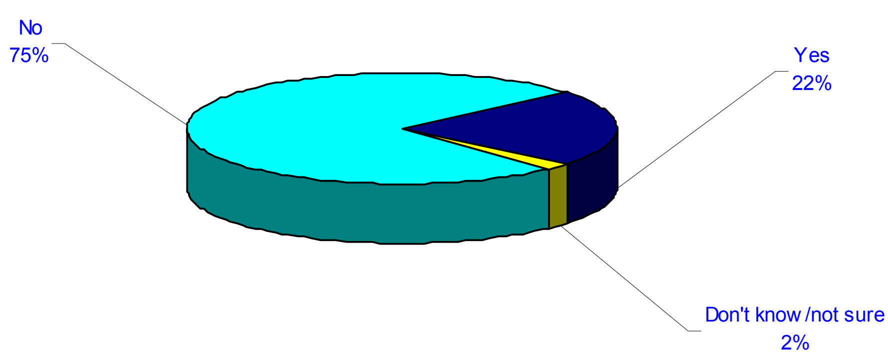
5.3 Awareness of Independent Assistance

5.3.1 Those surveyed were asked if they were aware of the availability of any independent assistance, such as ESCOSA's Electricity Price Comparison Service, to help in making energy decisions.

5.3.2 Over one fifth (22%, down from 24% in 2004) of the residents surveyed indicated that they were aware of the availability of independent assistance, such as ESCOSA's Electricity Price Comparison Service to help in making energy decisions. Three quarters (75%) of respondents were unaware of this service.

5.3.3 Awareness of this assistance was higher among several groups, those respondents who were retired (27%), males (28%), those who have a partner/ spouse without children at home (27%), those living in metropolitan Adelaide (25%) and those aged 40 plus (25%) particularly those aged 55 to 64 (31%).

ARE YOU AWARE OF THE AVAILABILITY OF ANY INDEPENDENT ASSISTANCE TO HELP IN MAKING ENERGY DECISIONS, SUCH AS ESCOSA'S ELECTRICITY PRICE COMPARISON SERVICE? (n=1211)



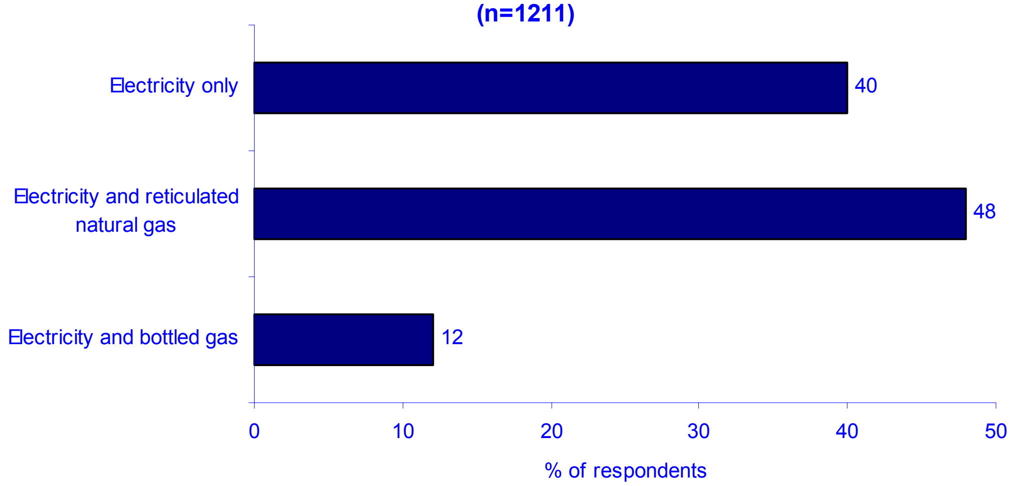
5.4 Household Energy Supply

Household Energy Combinations

5.4.1 Those surveyed were asked what energy combinations they had in their household.

5.4.2 Almost half (48%) had electricity and reticulated natural gas. A significant proportion had electricity only (40%), while a further 12% had electricity and bottled gas.

WHAT ENERGY COMBINATIONS DO YOU HAVE IN YOUR HOUSEHOLD? (n=1211)



Incidence of Having the Same Retailer for Both Electricity and Gas

5.4.3 The incidence of residents having the same retailer for both their electricity and gas increased slightly to more approximately one quarter (24%, up from 22% in 2004). The main retailers named included:

- AGL (9%, down from 12% in 2004)
- Origin (8%, up from 7% in 2004)
- TXU (4%, up from 3% in 2004)

Retailers Response and the Level of Customer Service

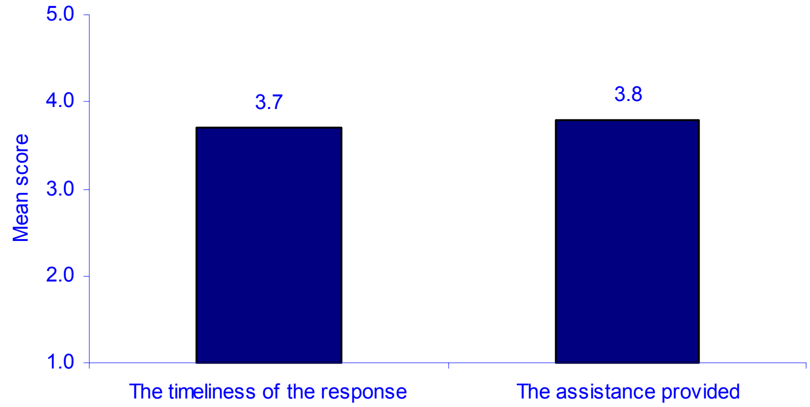
5.4.4 The majority (73%) of respondents had not contacted their retailer in the past twelve months, compared to 27% who had.

5.4.5 Those surveyed were read two statements relating to the customer service received from their retailer and asked to rate, on a scale of 1 to 5, where 5 is very satisfied and 1 is dissatisfied, their level of satisfaction with these statements. It is generally considered that an average rating of 3.5 represents a reasonably high level of satisfaction, 4.0 a very high level of satisfaction and 4.5 or above an extremely high level of satisfaction.

5.4.6 Based on these parameters, there was a reasonably high level of satisfaction that the timeliness of the response - average rating of 3.7.

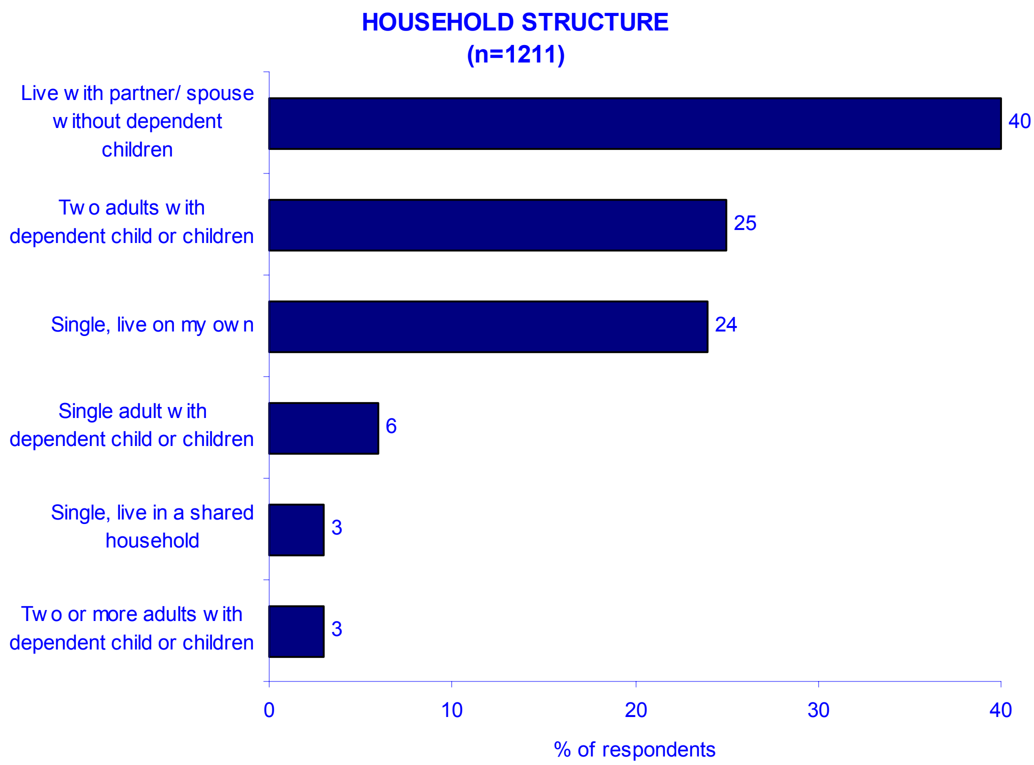
5.4.7 In relation to the assistance provided, there was also a reasonably high level of satisfaction, with an average rating of 3.8.

ON A SCALE OF 1 TO 5, WHERE 5 IS STRONGLY AGREE AND 1 IS STRONGLY DISAGREE, PLEASE RATE YOUR LEVEL OF AGREEMENT WITH THE FOLLOWING (n=1211)

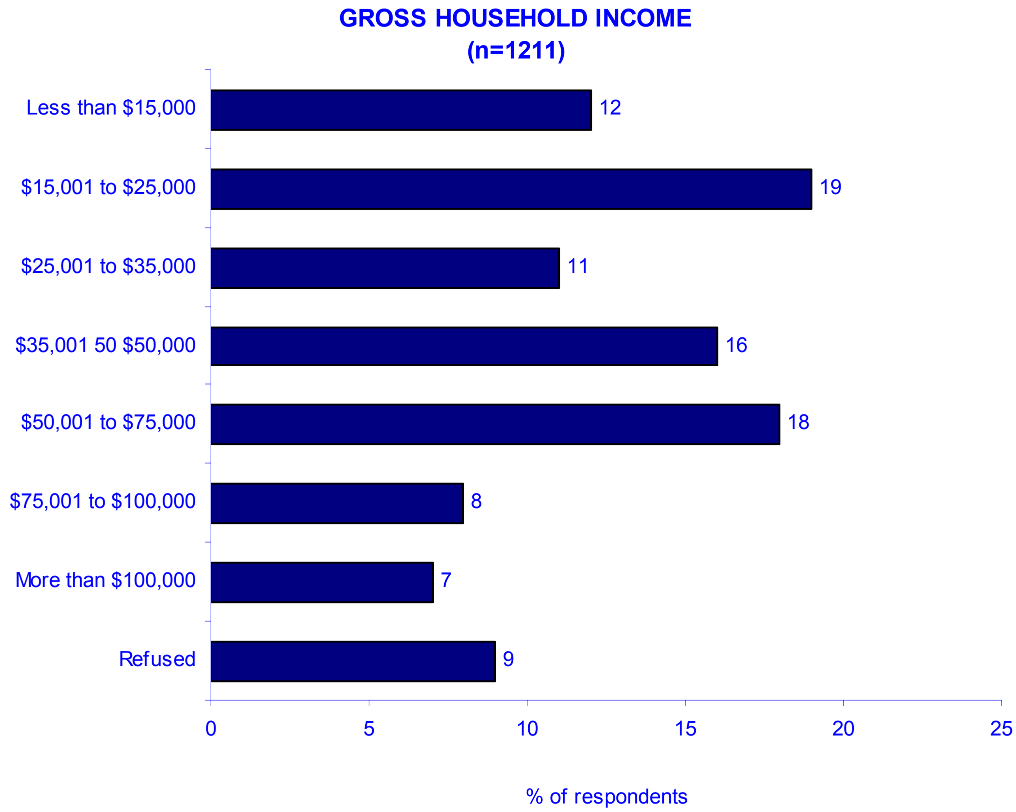


5.5 Sample Characteristics

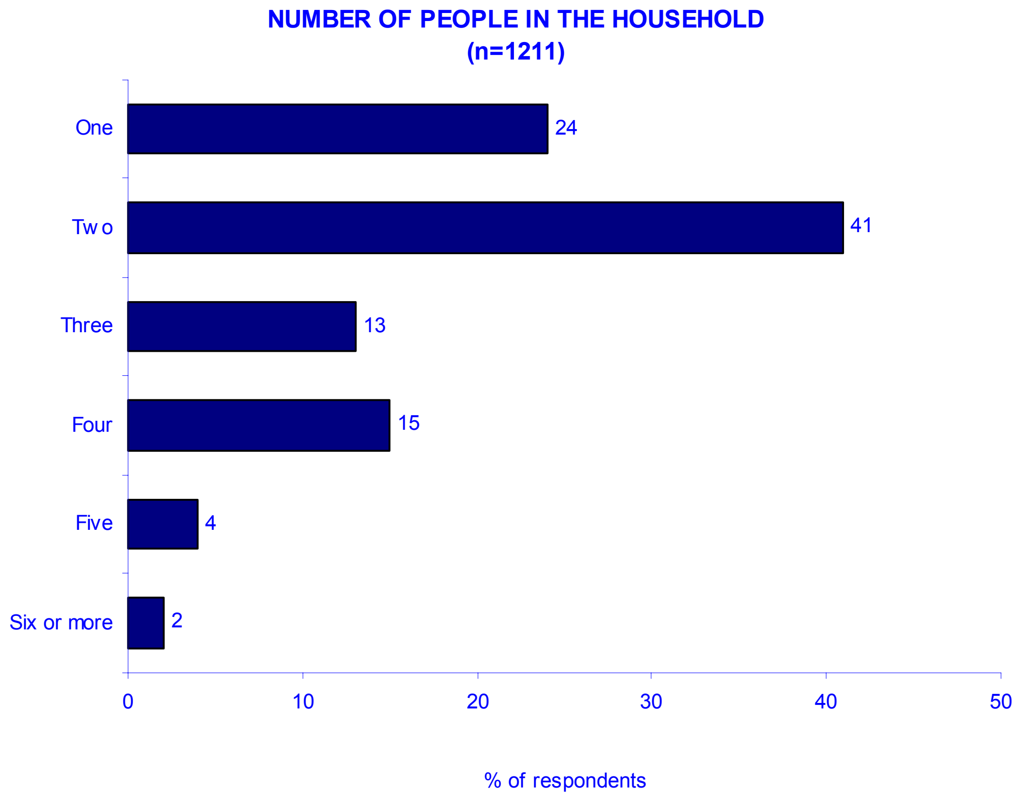
Household Composition



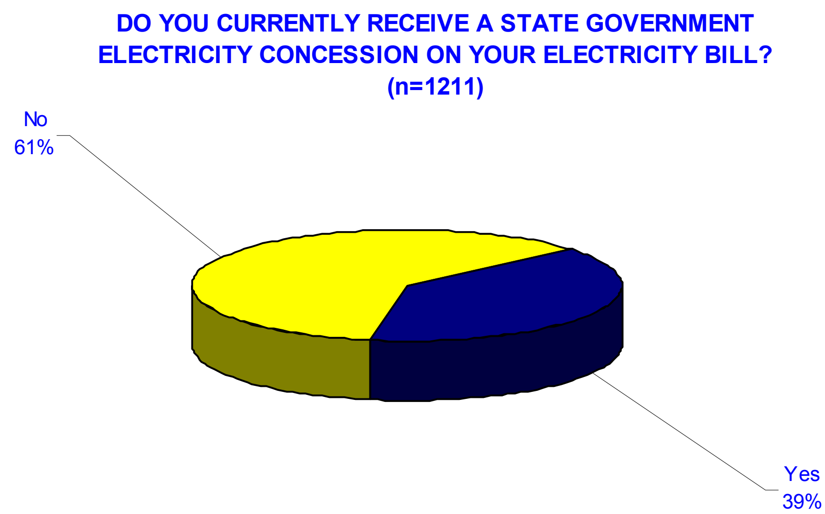
Gross Household Income



Number of People Living in the Household



Incidence of Receiving a State Government Energy Concession



Appendix 1:
About The Research

How We Did the Research

McGregor Tan Research conducted 1,211 telephone interviews with residents of South Australia in the following areas:

- Adelaide metropolitan area - 808
- Regional South Australia - 403

These interviews were conducted 31st January to 13th February, 2006.

Who was involved?

Gender and age

Sample characteristics - gender and age		No. of respondents	% of respondents	% of Adel. 18+
Males		490	41	48
Females		721	59	52
Age groups:	18-24	26	2	17
	25-30	65	5	12
	31-39	157	13	18
	40-54	374	31	24
	55-64	277	23	12
	65+	312	26	17
Total sample		**1,211**	**100**	**100**

Employment and occupation

Sample characteristics - employment and occupation	No. of respondents	% of respondents
Professional/executive	170	14
White collar	239	20
Blue collar	184	15
Total in paid employment	**593**	**49**
Home duties	134	11
Retired	366	30
Other (student, unemployed, etc.)	118	10
Total not in paid employment	**618**	**51**

Appendix 2:
Additional Comments

This section lists the responses, made by individual interviewees, which did not fit within the coded responses. Each is a single response, except where specified by a number of respondents shown in brackets.

These comments are included for completeness, but always remember they are minor responses, negligible in relation to the main, coded data. *In other words, remember that these are generally isolated comments, providing flavour but not constituting the main ingredients.*

ESCOSA RESIDENTS SURVEY - JANUARY 2006

Q4: Which company do you currently buy electricity from? Other - specify

AGL
Andamooka Power House
Boral
Boral
Boral
Cooper Pedy district council
Electricity Australia
Energy
Ergo Australia
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA (?Electricity Trust of South Australia)
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
gc
Green Earth Electricity
Power Cor
RAA
Roxby Downs Council (just pay them)

Q6: Which companies do you think you could buy electricity from? Any others? Other - specify

Australia Light.
Boral
Boral
Boral
Energy SA
Ergon
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
Flinders
Gas Company
Green earth energy
Green energy
Green Energy.
Green option
Green power
Hardware shop
kleenheat
RAA
Town & Country Energy

Q8: Which retailer or retailers did you receive such an individual offer from? Any others? Other - specify

A Victorian Co.
Boral
Boral
Ergon Australia

ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA.
Green Earth Electricity
RAA
SAF
SAF Power
The RAA offered a discount on membership if we joined Energy Australia
TRU
TRUE ENERGY
True energy

***Q11: Which retailers or retailers did you approach? Any others?* Other - specify**

Boral
ESCOSA
ETSA
ETSA.
United Farmers & Graziers.

***Q15: What was the name of your old or previous electricity retailer?* Other - specify**

Can't remember previous electricity retailer, is from QLD
Didn't have electricity before.
Electricity Trust.
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA
ETSA

ETSA
ETSA
ETSA (went from standard account to contract. Did not change supplier)
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA.
ETSA
not with a prior retailer, came from overseas

Q16: What was the main driver in your decision to change retailers? Other - specify

BASE: Have taken out a contract with an electricity retailer Other (not coded)

Discussions on the radio.
Energy Australia, was a totally Australian owned company
Felt pressured to change and get a contract with someone that it was essential to be with someone
Get the sales person out the door.
Give another company ago, talked into, fast talking salesman
Good salesman, pleasant.
Have shares with AGL
I needed some one and they were the first to respond
I thought I had to have a contract.
I was told that part of the power would be generated by wind farms.
It was a rule of AGL to sign a contract.
Lack of knowledge of where I could get electricity from.
Meter was faulty   charged us for it my husband paid it not happy with ETSA
Monopolistic bastardisation of customers
Moved from Tasmania
Moved house
Moving state
Not much gain to change.
Poor administrative system, couldn't get accounts right (or anything in that matter)
Selling off of ETSA.
Structure of their offer
The fact that they are local to speak to.
They would not give me my discounts
Thought I had to
TRU increased contract to 3 years

Q17: Why haven't you taken out a contract? Other - specify

Filter: Other (not coded)

Concern with the fact they would have my bank details
Current one has expired
Did not want to do 3-phase power.
Didn't know that you could
Don't like to have give bank account details to have it paid automatically from account, like to pay at post office
Electricity goes through farm and don't have to pay
gg
Haven't got around to it

I have been burnt before
I haven't heard of it
I'm very angry with Mr Olsen selling off our electricity for the next 200 years, he should be shot for what he has done to our state.
In a contract
Joining the energy coop
Just transferred over
Just worried about promises made not actually honoured.
Lapsed contract
My husband is on a disability pension and no need to
Needing a comparison
No time to read the fine print.
Non available
None available
Only aware of one possible supplier. Should never have been privatised as account went up by 33 percent. Serviced is not as good. Inconsistent supply.
Pay through rent.
Provides more flexibility
There all the same
There all the same
Wanted bank no., didn't want to
With the RAA but no contract.

Q22: What was the source of this information? Advertisements - specify

Filter: Advertisements (not coded)
Advertiser and television ads.
Given information when gas was connected
RAA

Q22: What was the source of this information? Other - specify

Filter: Other (not coded)
Because of the other bill. Price increase
Farmers Federation
RAA.
Sourced own quotes from other retailers
Telephone calls, used yellow pages, and had information sent out to us to read.
The media
The RAA publication

Q30: Which company do you currently buy gas from? Other - specify

Boral
Boral
Boral
Boral
Buy gas from the park owner Emasseries.
Energy Australia
gc

Green Earth Electricity
RAA.
SA Gas.
The Gas Company.
true energy

Q30: Which companies do you think you could buy gas from? Any others? Other - specify

Any of them
Aurora Energy.
Boral gas
Boral.
Boral.
Centro
elgas
Epic Energy.
Gasworks.
Power Direct.
SA Gas Board.
TRU
Woolworths, Kmart.

Q33: Which retailer or retailers did you receive such an individual offer from? Any others? Other - specify

Boral
Energy
ETSA
ETSA
qjhl
True energy

Q40: What was the name of your old or previous gas retailer? Other - specify

Boral
Boral Gas.
Gas Company.
Never had gas before
No gas available at previous location
No one - didn't have gas previously.
Only had origin
SA gas co
SA Gas Company
SA Gas Company
South Australian Gas
The Gas Company.
We didn't have gas in Tasmania

Q41: What was the main driver in your decision to change retailers? Other - specify

Filter: Other (not coded)

Administrative processes
Get sales person out eh door.
Greener
Lack of customer service.
Monopolistic bastardisation of customers, abuse of power
Moving interstate
No one else approached me.
Not applicable.
Privatisation of the gas companies.
The fact they offered it to me
The previous gas co changed name not us.
The previous supplier /had difficulty understanding the billing system
There was no other gas suppliers
We moved to S.A

Q42: Why haven't you taken out a contract? Other - specify

Am very angry with Olsen for selling out for the next 200 years so don't want to deal with any of them.
Annoyed that own company has to ask her for her electricity info, they should have that all at hand and offer you a better deal
automatically hooked up to them with the electricity
Because I wasn't asked to
Did not need to.
Do not like the hard sell approach
Do not need to have a contract.
Don't like to be tied down
Don't use enough gas to warrant getting onto a contract
Gas not available in area
Haven't been offered one
I believe I did have to for gas, however to receive the discount I need to have both with the same retailer.
I like to use different companies to increase competition in the market.
In the process of being done.
Just generally concerned that the contract will not be honoured.
Live in retirement village, so there is a fixed supplier.
Locked into contract until July
Never had gas
No fees and charges to get in and out of contract with Origin.
No genuine competition
No offers, not aware
Nothing offered.
Prefer the system the way it used to be with no contracts needed.
Then you could get stuck and be paying higher prices while under contract
Time
Waiting to transfer at present.

Q47: What was the source of this information? **Advertisements - specify**

Advertiser
Advertiser newspaper, fliers
Messenger
Radio
radio
Television ads.

Q47: What was the source of this information? **Other - specify**

By door knocking
Central Services Commission.
Door to door salesmen
Looked up the phone book, but could not fin d anything
Product Brochures.
RAA

Q53: Have you experienced any of the following behaviour from an energy (electricity or gas) retailer or retailer's representative in the past 12 months? **Other - specify**

Abrupt, take it or leave it sort of attitude
AGL refused to pass on electricity contract to Origin, had to contact local member of issue. Being ripped off by AGL.
AGL, trees were overhanging the wires and they didn't respond appropriately to the issue, concerns over electrocution
Did not receive a bill from ETSA for nine months and they were not very compliant with my requests.
Found behaviour of being approached at home [in the driveway] intrusive with putting pressure on to sign a contract
Had problems getting continued supplied because previous tenants did not pay their bills
Have had a great deal of difficulty understanding the reps. that come to the door especially would be good if they could speak English.
High electricity account on one quarter for no apparent reason.
High pressure selling/expectation to only sign at the time/
I lived in Adelaide and cancelled my contract and they promised to read my metre and they did not come and as a consequence I had to pay extra as workmen used my power/also poor customer service.
Incorrect meter readings on my bills three times in last two years. I keep my own daily record so they apologise and take my word for it. The largest mistake was $600 too much.
Information was very confusing and pressure put on the sign immediately
Last quarter bill was missed and were given two bills at once/
Meter readers who have got a key to get in and do not attempt to come in because of a dog who does not go into that part of the yard.
Mix up with address, and consequently got a double up of bills from previous company and new one.
Money that was credited to my account should have been taken off the next bills, but the company wanted to keep the money as we had finished a contract with them, and were not offering another contract.
Number of people who are servicing area has been reduced.
Offers not produced E.g. discounts unless tariffs are given first, however unable to determine tariffs until info from company given, not happy with this as feels they are manufactured to try and win you over. Also wanted to have contract before summer rates came in and was not happy with transfer process did not happen when they said it would so missed out.
Origin sending someone around to our units that we all were unable to understand as she came from India and frustrated many of us
Overcharging for 6 months.
People demanding to speak to decision maker and not leaving, interruptive phone calls, repeat phone calls (harassing)

Persistent selling
The changeover process was very slow and we were not sure who we were dealing with. The excuse was that it was the paper work that was holding it up. We were supposed to be getting a monthly bill and our first bill when it came was really big.
They come to the door at tea time when it is not convenient.
They did not have my right number and it took six months to sort out.
Trick of the offer only available now.
Under conception that there would be no supply unless had a contract electricity/gas
Victorian company said they could beat any company's price, not true.

Q66: Are you....?Other - specify

Aged units which we buy into but can't sell.
Donation to live in aged unit
Employer provided.
Family arrangement
House sitting for grandparent
I live in a retirement village.
I live in a retirement village.
Live in a retirement village unit don't own it.
Live in a retirement village, and purchase a license for life.
Not willing to answer
Refused
Refused
Refused
Refused.
Retirement Village
Retirement village
Retirement village
Retirement village - bought when I came in, but not actual "owners"
Supported accommodation.

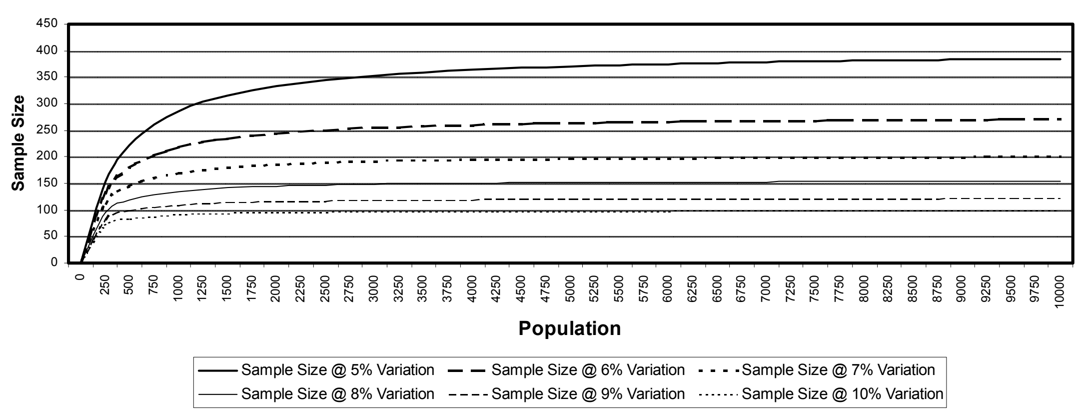
Appendix 3:
Sampling Tolerance

It should be borne in mind throughout this report that all data based on sample surveys are subject to a sampling tolerance. That is, where a sample is used to represent an entire population, the resulting figures should not be regarded as absolute values, but rather as the mid-point of a range plus or minus x% (see sampling tolerance table below). Only variations clearly designated as *significantly* different are statistically valid differences and these are clearly pointed out in the Key Findings section of this report. Other divergences are within the normal range of fluctuation at a 95% confidence level; they should be viewed with some caution and not treated as statistically reliable changes.

MARGIN OF ERROR TABLE (95% confidence level)

SAMPLE SIZE ↓	5% 95%	10% 90%	15% 85%	20% 80%	25% 75%	30% 70%	35% 65%	40% 60%	45% 55%	50% 50%
	Percentages giving a particular answer									
50	6	9	10	11	12	13	14	14	14	14
100	4	6	7	8	9	9	10	10	10	10
150	4	5	6	7	7	8	8	8	8	8
200	3	4	5	6	6	6	7	7	7	7
250	3	4	5	5	6	6	6	6	6	6
300	3	4	4	5	5	5	6	6	6	6
400	2	3	4	4	4	5	5	5	5	5
500	2	3	3	4	4	4	4	4	4	5
600	2	2	3	3	4	4	4	4	4	4
700	2	2	3	3	3	4	4	4	4	4
800	2	2	3	3	3	3	3	4	4	4
900	2	2	2	3	3	3	3	3	3	3
1000	1	2	2	3	3	3	3	3	3	3
1500	1	2	3	2	2	2	3	3	3	3
2000	1	1	2	2	2	2	2	2	2	2
3000	1	1	1	2	2	2	2	2	2	2

Optimum Sample Sizes to Ensure the Given Maximum Variation



Appendix 4: Questionnaire

McGregor Tan Research

Project No: 7698-R

ESCOSA - RESIDENTS SURVEY - 2006

Good .... my name is .... from McGregor Tan Research, the independent market research company. We are conducting a survey about competition in the electricity and gas market for the Essential Services Commission of South Australia and would like to speak to the main person in the **household** who makes decisions about the purchase of electricity and/or gas.

1. What energy combinations do you have in your household? **Read out single response**

1.........Electricity and reticulated natural gas	**Complete Sections 1, 2 & 3**
2.........Electricity and bottled gas	**Complete Sections 1 & 3 ONLY**
3.........Electricity only	**Complete Sections 1 & 3 ONLY**
4.........Reticulated natural gas only	**Complete Sections 2 & 3 ONLY**
5.........Bottled gas or reticulated LPG only	**Thank and terminate**
6.........Don't know/not sure	**Thank and terminate**

SECTION 1 - ELECTRICITY

2. What is your current **approximate** average consumption of electricity as represented by your average quarterly bill?
Read out single response
(Interviewers note - we are looking for the best or closest approximation)

1.........Less than $150 per quarter	
2.........$151 to $200 per quarter	
3.........$201 to $250 per quarter	
4.........$251 to $300 per quarter	
5.........$301 to $500 per quarter	
6.........$501 to $700 per quarter	
7.........More than $700 per quarter	
8.........Don't know	**Thank and terminate**

3. As far as you are aware, which of the following applies?
Read out, single response rotated
1.........I can choose my own electricity retailer now
2.........I am obliged to purchase electricity from my existing retailer
3.........Don't know

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4. Which company do you currently buy electricity from?
Unprompted single response (Interviewers note - if the respondent is confused as to who is the current retailer, the retailer selected should be the one they have moved, or are moving to)
01.......AGL
02.......Aurora Energy
03.......Country Energy
04.......Energy Australia
05.......Jackgreen
06.......Momentum Energy
07.......Origin
08.......Powerdirect
09.......Red Energy
10.......South Australian Electricity
11.......TXU / TRUenergy
12.......Other - **specify**
13.......Don't know/not sure

5. Do you have the same retailer for both electricity and gas?
1.........Yes
2.........Don't know/not sure
3.........No
4.........Don't have reticulated gas

6. Which companies do you think you could buy electricity from? Any others?
Unprompted multiple response
01.......AGL
02.......Aurora Energy
03.......Country Energy
04.......Energy Australia
05.......Jackgreen
06.......Momentum Energy
07.......Origin
08.......Powerdirect
09.......Red Energy
10.......South Australian Electricity
11.......TXU / TRUenergy
12.......Other - **specify**
13.......Don't know/not sure

7. Have you received an individual **offer of a contract** from any electricity retailer, including your existing retailer, for them to sell you electricity?
(Interviewer note: an offer should have identified the electricity charges that would apply to the respondent, rather than general savings through advertising and/or general promotional literature)

1.........Yes	**Go to Q8**
2.........Don't know/not sure	**Go to Q10**
3.........No	**Go to Q10**

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8. **Have received an offer (code 1 in Q7):** Which retailer or retailers did you receive such an individual offer from? Any others? **Unprompted multiple response**

01.......AGL
02.......Aurora Energy
03.......Country Energy
04.......Energy Australia
05.......Jackgreen
06.......Momentum Energy
07.......Origin
08.......Powerdirect
09.......Red Energy
10.......South Australian Electricity
11.......TXU / TRUenergy
12.......Other - **specify**
13.......Don't know/not sure

9. **Have received an offer (code 1 in Q7):** How easy was it to understand the offer?

1.........Very easy
2.........Quite easy
3.........Neither easy nor difficult
4.........Quite difficult
5.........Very difficult
6.........Don't know/not sure

10. **ASK ALL:** Have you approached any electricity retailer or retailers, including your existing retailer, to ask about buying your electricity from them?

1.........Yes	**Go to Q11**
2.........Don't know/not sure	**Go to Q13**
3.........No	**Go to Q13**

11. **Have approached a retailer (code 1 in Q10):** Which retailer or retailers did you approach? Any others? **Unprompted multiple response**

01.......AGL
02.......Aurora Energy
03.......Country Energy
04.......Energy Australia
05.......Jackgreen
06.......Momentum Energy
07.......Origin
08.......Powerdirect
09.......Red Energy
10.......South Australian Electricity
11.......TXU / TRUenergy
12.......Other - **specify**
13.......Don't know/not sure

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12. **Have approached a retailer (code 1 in Q10):** Were you refused by the retailer?
    1.........Yes
    2.........Don't know/not sure
    3.........No

13. **ASK ALL:** Have you taken out a contract with an electricity retailer?

1.........Yes	**Go to Q14**
2.........Don't know/not sure	**Go to Q17**
3.........No	**Go to Q17**

14. **Have taken out a contract (codes 1 in Q13):** How easy was the transfer process?
    1.........Very easy
    2.........Quite easy
    3.........Neither easy nor difficult
    4.........Quite difficult
    5.........Very difficult
    6.........Don't know/not sure/haven't taken out a contract

15. **Have taken out a contract (codes 1 in Q13):** What was the name of your old or previous electricity retailer?
    Unprompted single response
    (Interviewers notes: It is possible for the new and old retailer to be the same; if there is confusion as to who is their current retailer, ask who were they with prior to taking out this contract)
    01.......AGL
    02.......Aurora Energy
    03.......Country Energy
    04.......Energy Australia
    05.......Jackgreen
    06.......Momentum Energy
    07.......Origin
    08.......Powerdirect
    09.......Red Energy
    10.......South Australian Electricity
    11.......TXU / TRUenergy
    12.......Other - **specify**
    13.......Don't know/not sure

16. **Have taken out a contract (codes 1 in Q13):** What was the **main** driver in your decision to change retailers?
    Unprompted single response
    01.......Consistency of supply
    02.......Price/cost
    03.......Trust them more
    04.......Other – specify
    05.......Don't know/not sure

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17. **Have NOT taken out a contract (codes 2-3 in Q13):** Why haven't you taken out a contract? **Unprompted multiple response**
    01.......Concern with the transfer process
    02.......Happy with current retailer
    03.......Higher costs with other retailers
    04.......Inadequate potential savings
    05.......Insufficient information
    06.......Lack of confidence in the new retailer
    07.......Waiting for better offers
    08.......Other - **specify**
    09.......Don't know/not sure

18. **ASK ALL:** Have you, at any stage, entered into a contract and used the cooling off period to cancel?
    1.........Yes
    2.........Don't know/not sure
    3.........No

19. In the next twelve months, how likely is it that you will take out a contract with your current electricity supplier or switch to another electricity retailer? **Read out single response**
    1.........Very likely
    2.........Quite likely
    3.........Neither unlikely nor likely
    4.........Quite unlikely
    5.........Very unlikely
    6.........Don't know/not sure

20. On a scale of 1 to 5, where 5 is very important and 1 is not at all important, please rate the importance of the following in relation to the decision to switch retailers? **Read out – rotate**

	Very important		➔		**Not at all important**	**Don't know**
Price	5	4	3	2	1	6
Supply	5	4	3	2	1	6
Having both contracts with the one retailer	5	4	3	2	1	6
The level of customer service	5	4	3	2	1	6

21. Have you looked for any information to assist you in making a decision about moving to a market contract with an electricity supplier, whether you have taken out a contract or not?
    1.........Yes **Go to Q22**
    2.........Don't know/not sure **Go to Q27**
    3.........No **Go to Q27**

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22. **Looked for information (code 1 in Q21):** What was the source of this information? **Unprompted multiple response**
    - 01.......Advertisements - **specify where**
    - 02.......Friends/family/work colleagues
    - 03.......The Internet
    - 04.......Representative of the retailer
    - 05.......Retailer
    - 06.......Other - **specify**
    - 07.......Don't know/not sure

23. **Looked for information (code 1 in Q21):** How easy was it to obtain the information?
    - 1.........Very easy
    - 2.........Quite easy
    - 3.........Neither easy nor difficult
    - 4.........Quite difficult
    - 5.........Very difficult
    - 6.........Don't know/not sure

24. **Looked for information (code 1 in Q21):** How easy was it to understand the information and compare offers?
    - 1.........Very easy
    - 2.........Quite easy
    - 3.........Neither easy nor difficult
    - 4.........Quite difficult
    - 5.........Very difficult
    - 6.........Don't know/not sure

25. **Looked for information (code 1 in Q21):** Were you able to obtain sufficient information to make an informed choice?
    - 1.........Yes
    - 2.........Don't know/not sure
    - 3.........No

26. **Looked for information (code 1 in Q21):** Was this information important to you in making your decision to switch retailers?
    - 1.........Yes
    - 2.........Don't know/not sure
    - 3.........No

27. **ASK ALL:** On a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, please rate the following in relation to the ease of understanding your current electricity bills? **Read out – rotate**

	Strongly agree		**➔**		**Strongly disagree**	**Don't know**
My electricity bill is easy to understand in its current format	5	4	3	2	1	6
The information contained in my electricity bill enables me to easily make comparisons with other electricity retailer's offers	5	4	3	2	1	6

McGregor Tan Research

SECTION 2 - GAS

28. What is your current approximate average consumption of gas as represented by your average quarterly bill?

    Read out single response

    (Interviewers note - we are looking for the best or closest approximation)

    1.........Less than $50 per quarter
    2.........$51 to $100 per quarter
    3.........$101 to $150 per quarter
    4.........$151 to $200 per quarter
    5.........$201 to $300 per quarter
    6.........More than $300 per quarter
    7.........Don't know **Thank and terminate**

29. As far as you are aware, which of the following applies?

    Read out, single response rotated

    1.........I can choose my own gas retailer now
    2.........I am obliged to purchase gas from my existing retailer
    3.........Don't know

30. Which company do you currently buy gas from?

    Unprompted single response (Interviewers note - if the respondent is confused as to who is the current retailer, the retailer selected should be the one they have moved, or are moving to)

    01.......AGL
    02.......Energy Australia
    03.......Origin Energy
    04.......TXU / TRUenergy
    05.......Other - **specify**
    06.......Don't know/not sure

31. Which companies do you think you could buy gas from? Any others?

    Unprompted multiple response

    01.......AGL
    02.......Energy Australia
    03.......Origin
    04.......TXU / TRUenergy
    05.......Other - **specify**
    06.......Don't know/not sure

32. Have you received an individual **offer of a contract** from any gas retailer, including your existing retailer, for them to sell you gas?

    (Interviewers note: an offer should have identified the gas charges that would apply to the respondent, rather than general savings through advertising and/or general promotional literature)

    1.........Yes **Go to Q33**
    2.........Don't know/not sure **Go to Q35**
    3.........No **Go to Q35**

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33. **Have received an offer (code 1 in Q32):** Which retailer or retailers did you receive such an individual offer from? Any others? **Unprompted multiple response**

01.......AGL
02.......Energy Australia
03.......Origin
04.......TXU / TRUenergy
05.......Other - **specify**
06.......Don't know/not sure

34. **Have received an offer (code 1 in Q32):** How easy was it to understand the offer?

1.........Very easy
2.........Quite easy
3.........Neither easy nor difficult
4.........Quite difficult
5.........Very difficult
6.........Don't know/not sure

35. **ASK ALL:** Have you approached any gas retailer or retailers, including your existing retailer, to ask about buying your gas from them?

1.........Yes	**Go to Q36**
2.........Don't know/not sure	**Go to Q38**
3.........No	**Go to Q38**

36. **Have approached a retailer (code 1 in Q35):** Which retailer or retailers did you approach? Any others? **Unprompted multiple response**

01.......AGL
02.......Energy Australia
03.......Origin
04.......TXU / TRUenergy
05.......Other - **specify**
06.......Don't know/not sure

37. **Have approached a retailer (code 1 in Q35):** Were you refused by the retailer?

1.........Yes
2.........Don't know/not sure
3.........No

38. **ASK ALL:** Have you taken out a contract with a gas retailer?

1.........Yes	**Go to Q39**
2.........Don't know/not sure	**Go to Q43**
3.........No	**Go to Q43**

39. **Have taken out a contract (codes 1 in Q38):** How easy was the transfer process?

1.........Very easy
2.........Quite easy
3.........Neither easy nor difficult
4.........Quite difficult
5.........Very difficult
6.........Don't know/not sure/haven't taken out a contract

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40. **Have taken out a contract (codes 1 in Q38):**
What was the name of your old or previous gas retailer? **Unprompted single response**
(Interviewers notes: It is possible for the new and old retailer to be the same; if there is confusion as to who is their current retailer, ask who they were with prior to taking out this contract)
01.......AGL
02.......Energy Australia
03.......Origin
04.......TXU / TRUenergy
05.......Other - **specify**
06.......Don't know/not sure

41. **Have taken out a contract (codes 1 in Q38):** What was the **main** driver in your decision to change retailers? **Unprompted single response**
01.......Consistency of supply
02.......Price/cost
03.......Trust them more
04.......Other – specify
05.......Don't know/not sure

42. **Have <u>NOT</u> taken out a contract (codes 2-3 in Q38):**
Why haven't you taken out a contract? **Unprompted multiple response**
01.......Concern with the transfer process
02.......Happy with current retailer
03.......Higher costs with other retailers
04.......Inadequate potential savings
05.......Insufficient information
06.......Lack of confidence in the new retailer
07.......Waiting for better offers
08.......Other - **specify**
09.......Don't know/not sure

43. **ASK ALL:** Have you, at any stage, entered into a contract and used the cooling off period to cancel?
1.........Yes
2.........Don't know/not sure
3.........No

44. In the next twelve months, how likely is it that you will take out a contract with your current gas supplier or switch to another gas retailer? **Read out single response**
1.........Very likely
2.........Quite likely
3.........Neither unlikely nor likely
4.........Quite unlikely
5.........Very unlikely
6.........Don't know/not sure

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45. On a scale of 1 to 5, where 5 is very important and 1 is not at all important, please rate the importance of the following in relation to the decision to switch retailers?
Read out – rotate

	Very important		➔		Not at all important	Don't know
Price	5	4	3	2	1	6
Supply	5	4	3	2	1	6
Having both contracts with the one retailer	5	4	3	2	1	6
Level of customer service	5	4	3	2	1	6

46. Have you looked for any information to assist you in making your decision about moving to a market contract with a gas supplier, whether you have taken out a contract or not?
1.........Yes **Go to Q47**
2.........Don't know/not sure **Go to Q52**
3.........No **Go to Q52**

47. **Looked for information (code 1 in Q46):** What was the source of this information? **Unprompted multiple response**
01.......Advertisements - **specify where**
02.......Friends/family/work colleagues
03.......The Internet
04.......Representative of the retailer
05.......Retailer
06.......Other - **specify**
07.......Don't know/not sure

48. **Looked for information (code 1 in Q46):** How easy was it to obtain the information?
1.........Very easy
2.........Quite easy
3.........Neither easy nor difficult
4.........Quite difficult
5.........Very difficult
6.........Don't know/not sure

49. **Looked for information (code 1 in Q46):** How easy was it to understand the information and compare offers?
1.........Very easy
2.........Quite easy
3.........Neither easy nor difficult
4.........Quite difficult
5.........Very difficult
6.........Don't know/not sure

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50. **Looked for information (code 1 in Q46):** Were you able to obtain sufficient information to make an informed choice?
    1.........Yes
    2.........Don't know/not sure
    3.........No

51. **Looked for information (code 1 in Q46):** Was this information important to you in making your decision to switch retailers?
    1.........Yes
    2.........Don't know/not sure
    3.........No

52. **ASK ALL:** On a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, please rate the following in relation to the ease of understanding your current gas bills. **Read out – rotate**

	Strongly agree		**➔**		**Strongly disagree**	**Don't know**
My gas bill is easy to understand in its current format	5	4	3	2	1	6
The information contained in my gas bill enables me to easily make comparisons with other gas retailer's offers	5	4	3	2	1	6

SECTION 3 - ASK ALL

53. Have you experienced any of the following behaviour from an energy (electricity or gas) retailer or retailer's representative in the past 12 months?
    Read out and rotate, multiple response
    01.......Actual tariffs did not match quoted tariffs
    02.......An attempt to trick you into signing a contract
    03.......High pressure selling including badgering and harassment
    04.......Not adhering to contract cooling off requirements
    05.......Provision of misleading or deceptive information
    06.......Transferring you to another retailer without your explicit consent
    07.......Other - **specify**
    08.......None of these

54. On a scale of 1 to 5, where 5 is strongly agree and 1 is strongly disagree, please rate the following statements in relation to new offers, billing options, special offers, product promotions, rebates, etc. **Read out and rotate**

	Strongly agree		**➔**		**Strongly disagree**	**Don't know**
In comparison to a year ago, the offers are more innovative	5	4	3	2	1	6
There is a greater variety of offers available compared to a year ago	5	4	3	2	1	6

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55. Are you aware of the availability of any independent assistance to help in making energy decisions, such as the Essential Services Commission of SA's Electricity Price Comparison Service?
1.........Yes
2.........Don't know/not sure
3.........No

56. Have you contacted your electricity and/or gas retailer in the past twelve months?
1.........Yes
2.........Don't know/not sure
3.........No

57. **Have contacted a retailer in the past twelve months (code 1 in Q56):** How satisfied were you with the following. Please rate on a scale of 1 to 5, where 5 is very satisfied and 1 is not at all satisfied.

	Very satisfied		➔		Not at all satisfied	Don't know
The timeliness of the response	5	4	3	2	1	6
The assistance provided	5	4	3	2	1	6

CLASSIFICATIONS

58. Which of the following broad categories best describes your household situation?
Read out, single response
1.........Single, live on my own
2.........Single, live in a shared household
3.........Live with partner/spouse without dependent children
4.........Single adult, with dependent child or children
5.........Two adults with dependent child or children
6.........Two or more adults with dependent child or children

59. **If Single (codes 1-2 in Q58):**
Is your gross household income,(this includes salary, pension and other concessions, other income sources etc.)
Read out, single response
1.........$20,000 or less
2.........More than $20,000

60. **If Live with partner/spouse (code 3 in Q58):**
Is your gross household income,(this includes salary, pension and other concessions, other income sources etc.)
Read out, single response
1.........$25,000 or less
2.........More than $25,000

61. **If Single adult with dependent child/children (code 4 in Q58):**
Is your gross household income,(this includes salary, pension and other concessions, other income sources etc.)
Read out, single response
1.........$30,000 or less
2.........More than $30,000

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62. **If Two adults with dependent child/children OR Two or more adults with dependent child/children (codes 5 or 6 in Q58):**

Is your gross household income,(this includes salary, pension and other concessions, other income sources etc.)

Read out, single response

1.........$35,000 or less
2.........More than $35,000

63. **ASK ALL:** Which of the following best describes your Gross Household Income?

Read out

1.........Under $15,000 pa
2.........$15,001 - 25,000 pa
3.........$25,001 - 35,000 pa
4.........$35,001 - 50,000 pa
5.........$50,001 - 75,000 pa
6.........$75,001 - 100,000pa
7.........More than $100,000
8.........Refused

64. Do you currently receive a State Government energy concession on your electricity bill?

1.........Yes
2.........No

65. How many people live in your household? **Unprompted single response**

01.......One
02.......Two
03.......Three
04.......Four
05.......Five
06.......Six
07.......Seven
08.......Eight
09.......Nine
10.......Ten
11.......More than ten
12.......Don't know/not sure

66. Are you ...?

01.......An owner/occupier
02.......Renting
03.......Other – **specify**
04.......Don't know/not sure

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67. Gender and age

11.......Male18 to 24
12.......Male 25 to 30
13.......Male 31 to 39
14.......Male 40 to 54
15.......Male 55 to 64
16.......Male 65+
21.......Female18 to 24
22.......Female 25 to 30
23.......Female 31 to 39
24.......Female 40 to 54
25.......Female 55 to 64
26.......Female 65+

68. Are you in paid employment?

If yes: What is your occupation?
1.........Professional/executive
2.........White collar
3.........Blue collar
If no: Could you please tell me how you describe your occupation?
4.........Home duties
5.........Retired
6.........Other

69. Metro/ Regional

1.........Metro
2.........Regional

70. Postcode

Appendix 5:
How To Read The Computer Tabulations

The computer tabulations in the report show the comparisons between [1] the answers given by the total number of respondents and [2] those given by the various subgroups. This is done in the form of percentages. Under certain data, you may notice the presence of + or - signs. These indicate where there is a statistically significant difference between the responses of the subgroup (e.g. males, people over 65, etc) and the group as a whole. When the responses of the subgroup are significantly less than the group as a whole, this is shown by a minus (-) sign. If, on the other hand, there is a significantly higher response by the subgroup, then a plus (+) sign appears. The degree of significance of difference is also indicated. Where a single (- or +), double (-- or ++) or triple (--- or +++) sign occurs, you can be, respectively, 90%, 95% or 99% sure that the subgroup is in fact answering differently to the group as a whole, and that it is not just a random fluctuation in the data. (See example below)

Please note that, because of rounding, answers in single response questions will not always sum precisely to 100%.

In addition, as the base for percentages is the number of *respondents* answering a particular question (rather than the number of *responses*) multiple response questions sum to more than 100%.

Example: How would you describe yourself?

		GENDER		AGE GROUP				
	TOTAL	Male	Female	16-24	25-34	35-44	45-54	55+
Complete non-smoker	298	148	150	59	56	55	78	50
	72%	70%	74%	67%	63%	69%	76%	89%
					-			+++
No. of respondents	416	212	204	88	89	80	103	56
	100%	100%	100%	100%	100%	100%	100%	100%

89% of all 55+ year olds said that they are complete non-smokers. We are 99% sure that this age group's response is significantly higher than the total of 72% (triple plus (+++) sign)

72% of all respondents said that they were complete non-smokers

74% of all females surveyed said that they were complete non-smokers. This is not a significantly different proportion to the total of 72% (no plus or minus signs)

63% of all 25-34 year olds said that they were complete non-smokers. We are 90% sure that this age group's response is significantly fewer that the total of 72% (single minus (-) sign)