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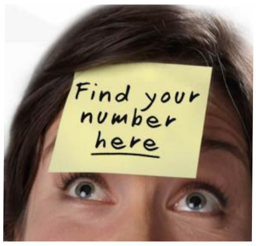
Advertising tracker

Report for the Electricity Authority – What’s My Number Campaign

UMR Omnibus results

June 2012



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UMR RESEARCH

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1. Methodology

Results in this report are based upon questions asked in the UMR Research nation-wide Omnibus survey. This is a telephone survey of a nationally representative sample of 750 New Zealanders 18 years of age and over.

Fieldwork was conducted from the 7th to 12th June 2012 at UMR Research's national interview facility in Auckland.

The margin of error for sample size of 750 for a 50% figure at the '95% confidence level' is ±3.6%.

2. Report

2.1 Executive summary

■ Slight increase across most key indicators, but significant fall in those who say you can save by switching

There has been a slight increase in most key indicators associated with considering switching electricity provider since the last tracking survey in October 2011 and remains above the levels recorded in the benchmark survey in May 2011 which preceded the launch of the campaign. However, there has been a significant fall in the number of those who agree that you can save money by switching electricity provider.

Visits to whatsmynumber.org.nz have increased slightly (up 2%), but declined slightly for powerswitch.co.nz (down 3%) since October. Of those who indicated that they have switched electricity provider in the last three months or are about to switch, 40% said this was as a result of the what'smynumber campaign. This represents about 6% of those who either pay the household electricity bill or have a say on who their electricity supplier is.

Awareness of the advertising campaign remains very high, particularly of the television advertisements. There has also been a significant rise in unprompted recall of the campaign by name.

This survey also shows an increase in awareness of the campaign on television, the radio and on websites.

■ Slightly more agree it is easy to switch electricity provider

Two-thirds (67%) of those responsible for paying the household electricity bill[1] agree[2] it is easy to switch electricity provider compared to 66% in October. This was lower than the 72% recorded in July 2011, but higher than the 63% in May that year. The number who disagree rose to 14% compared to 10% in October, 12% neither agree nor disagree with the remainder (7%) unable to give an answer.

■ Choice of provider measure increases very slightly

The vast majority (84%) of those responsible for paying the household electricity bill agree they have a choice of electricity provider. This is up very slightly (1%) on the October figure, but 4% below the peak recorded in July 2011. Only 6% disagree and 9% neither agree nor disagree with the remainder (1%) unable to give an answer.

■ Agreement about ability to switch provider also inches up slightly

Slightly more (80%, up 2%) agree they can switch electricity provider than in October. This is just above the May 2011 benchmark (79%) but below the July 2012 peak (85%). Only 9% disagree and 9% neither agree nor disagree with the remainder (2%) unable to give an answer.

[1] All responses in this report are from those who either pay the electricity bill in their household or have a say in who their electricity provider is. This was 80% of the total sample or n=599.

[2] Respondents were asked to rate their level of agreement on a 1-5 scale where 1 meant 'strongly agree' and 5 'strongly disagree'. Those who agree gave a '1' or '2' rating and those who disagree a '4' or '5' rating.

Significant decrease in those convinced of savings from switching

Barely half (52%) of those responsible for paying the household electricity bill agree that they can save money by switching electricity provider. This is a significant fall from the 63% recorded in October and only slightly above the 49% recorded in the May 2011 benchmark. There was an 8% increase from October to 21% who disagree that savings can be made from switching with 20% neither agreeing nor disagreeing with the remainder (7%) unable to give an answer.

No change in those who believe it is worthwhile reviewing their retail provider regularly

Despite the fall in those who agree you can save money from switching, there has been no change since October in those who believe it is worthwhile reviewing their electricity retailer with 74% saying this compared to 76% in July 2011. This remains above the benchmark figure of 69%.

In the last three months

There were no statistically significant changes in key indicators of the propensity to switch over the last three months. There was a very slight fall (down 1%) among those who had discussed electricity options with others and a 4% fall in those who had checked potential savings if they were to change to a cheaper plan or provider. However, very slight increases of 1% were recorded for contacting their existing electricity supplier to review their pricing plan and contacting their electricity supplier other than their current provider and a 2% increase among those who had switched or were about to. All indicators are down on the May 2011 benchmark except for ‘switched supplier or are about to switch’ which is up 5%. The following summarises the change in key indicators:

- 43% (down 1% on October) discussed electricity options with others; up 1% on the benchmark.
- 34% (down 4% on October) checked their potential annual savings if they changed to a cheaper plan or provider; down 3% on the benchmark.
- 19% (up 1% on October) contacted their existing supplier to review their pricing plan; down 4% on the benchmark.
- 16% (up 1% on October) contacted an electricity supplier other than their current provider; down 3% on the benchmark.
- 16% (up 2% on October) switched electricity supplier or are just about to switch; up 5% on the benchmark.

Increase in those aware of advertising visit what’smynumber website

The campaign continues to have a positive influence in encouraging people to visit the target websites to check out what they are currently paying. Of those aware of the campaign, a quarter (26%, up 2%) visited whatsmynumber.org.nz though 19% visited powerswitch.co.nz (down 3%) as a result of the advertising.

Of those who say they have switched in the last three months or are about to do so, 40% (down 4%) say this was as a result of the advertising campaign. This though represents only 6% of those who pay the household electricity bill or have a say in who the supplier is.

Awareness of campaign via print channels up; TV, radio and websites down

There are still very high levels of declared awareness (92%) of advertising to encourage people to find out how much they could save if they switched to a different power company though this is 6% up on the October figure and back to the July 2011 level. There was also significantly higher recall of what’smynumber as the organisation or power saving initiative the advertising was promoting. 18.5% cited what’smynumber compared to 9.7% in October and 10.7% in July.

5.5% named ‘powerswitch’ and 8.1% mentioned a website to help you change power company. This amounts to 32% having some unprompted ability to either name the campaign or to express its intention in some way compared to 15% who mentioned a power company.

Prompted awareness of advertising

Respondents that did not spontaneously recall 'whatsmynumber' were asked recall on a prompted basis. Of those initially unaware, on a prompted basis the television ad was the channel that created the highest awareness (93%, up 8%) which was well above:

- Newspaper or magazine (25%, down 3%).
- Radio (24%, up 4%).
- On a website (23%, up 4%).
- On a bus back (12%, down 2%).
- On a billboard (10%, up 1%).

2.2 Small rise in those who agree they have choice and can switch, but increased levels of agreement from rural and Māori

There was a 1% rise to 84% among those who agreed that they had a choice of electricity provider. There was significantly higher levels of agreement from those in rural areas (87%; up 12%) which was well above the 76% recorded in July 2011. Among Māori, 89% agreed they had choice, which was an 8% increase on July. A slightly higher number (80%; up 2%) agreed that they could switch provider with rural (80%; up 8%) and Māori (78%; up 6%).

Wellingtonians continue to have the highest level of agreement that they have a choice of provider with 88% in agreement compared with 83% in Auckland and Christchurch (up 1%) and 84% in provincial areas. Similarly, in terms of agreement that they can switch providers, Wellingtonians led with 88% (up 5%) in agreement.

There was little difference between income groups about whether there was a choice of provider or that they could switch provider. Of those on a personal income of more than $70,000, (84%, down 8%) agreed they had a choice of provider compared to 81% (up 8%) of those on incomes of less than $15,000. Similarly, 87% (down 2%) of those on more than $70,000 agreed they could switch provider compared to 80% (up 7%) of those on incomes of less than $15,000.

Those over 60 years had the lowest levels of agreement. Of those over 60, 75% agreed they had a choice of provider and 70% agreed that they could switch provider.

2.3 Sharp fall in those who agree you can save money by switching provider

There was a sharp fall to about half (52%; down 9%) who agree they can save money by switching provider. Their decline in agreement was across all demographics by gender, region and age.

We can only suggest possible explanations for this fall. It is possible some of the early, colder winter weather may have signalled that power bills would be increasing regardless of switching and that this may have influenced views that even if they switched they would be paying more. There is also a minor effect caused by a slightly higher proportion (16% compared with 14% of bill payers or those who have a say in their electricity provider) in this survey having switched or who have been considering doing so in the past three months. Further, it is possible that if there has been a higher rate of switching since October that there may be a larger group in the survey who believe they have switched to the lowest cost provider and hence do not think they can save more by switching.

There still continues to be significant differences by age and income with respect to agreeing that savings could be made from switching. While 52% of all agreed money could be saved, only 38% (down 12%) of those over 60 years agreed compared to (51%; down 21%) of those under 30 years.

Unlike the last survey, there was a little difference in terms of location with 54% (rural) and 58% (Wellington) agreeing savings could be made.

Those who agree they can save money by switching continue to be those who were far more likely to have engaged in activities over the last three months that were consistent with checking or comparing prices or switching. They were also more likely to agree that they could switch provider or to agree it was easy to switch.

There was a slight 1% rise to 67% among those who agreed that it was easy to switch provider. There was little difference between this figure and that for Māori (63%; down 1%) or among those in rural areas (69%; up 3%) who agreed.

Men (70%) are now more likely to agree it's easy to switch provider than women (64%). There were no significant differences by age or income with respect to the ease of switching providers.

2.4 Reviewers vs non-reviewers of retailers

Slightly less than three-quarters (74%; no change) believe it is worthwhile to review their retailer regularly and 22% (down 1%) do not. The older people get the less likely they are to believe it is worthwhile with (60%; down 1%) of those over 60 believing it is compared to (81%; up 3%) of those under 30. There was no significant gender or regional difference in responses.

Among Māori (79%, down 7%) were more likely to believe it was worthwhile than non-Māori (74%, up 2%).

Those who believed it was worthwhile were also significantly more inclined to have engaged in activities over the last three months that were consistent with checking or comparing prices or switching.

2.5 Advertising - what'smynumber recall up

Unprompted recall

A high proportion (92%, up 6%) remembered any advertising in the last two months to encourage people to find out how much they could save if they switched to a different power company. There was no significant difference by gender, location, age or income.

There was a significant increase in recall of the campaign as 18.5% mentioned 'whatsmynumber' (up 8.5%), 8% mentioned 'a website to help you to change power company' and 5.5% 'powerswitch'. As noted, 15% thought a power company was behind the advertising, and 49% were unsure.

Those under 30 (26%, up 3%) and those 30-44 years (27%, up 15%) had by far the highest recall of 'whatsmynumber' than any other age groups and a lot more than those over 60 (8%, up 7%).

Prompted recall and channel sources

Respondents that did not spontaneously recall 'whatsmynumber' were read a description of the ad campaign and were asked whether they had read, seen or heard any of the ads.

Awareness of the television ads remained high (93%, up 8%) and there were no significant regional, gender, age or income differences in awareness.

Awareness of the campaign on the radio rose 4% to 24%. Age was the key differentiator with 27% (down 3%) of those under 30 aware of the radio campaign compared to 18% (up 4%) of those over 60. There was no significant gender difference with 25% of men and 22% of women (up 5%) aware of the radio advertising.

There was a 3% fall to 25% of those aware of the print advertising in newspapers or magazines with a higher number among those over 60 (30%, down2%) aware.

There was an increase in the number who were aware of the campaign on websites (23%, up 4%). The key differences here were by age with 39% (up 11%) of those under 30 aware compared to 12% (up 3%) of those over 60 and by income with 30% (up 5%) of those on incomes over $70,000 aware compared to 22% (up 8%) of those on incomes less than $15,000.

12% (down 2%) were aware of the campaign from the back of buses with awareness lowest among those over 60 (9%, down 1%) and highest among those 30-44 years (16%, down 2%).

11% (up 1%) were aware of the campaign from billboards with awareness higher among those 30-44 years (12%, up 2%) and lowest among those over 60 (6%, down 1%).

Website visits - whatsmynumber.org.nz

Almost a quarter (26%, up 2%) of those who were aware of any advertising encouraging people to find out how much they could save if they switched or who were aware of whatsmynumber.org.nz visited the website whatsmynumber.org.nz. This represents 23% (up 4%) of those who are either responsible for paying the household electricity bill or have a say in who their electricity supplier is.

Of the 34% who had checked potential annual savings in the last three months, two-thirds (66%) had visited the website and 72% said they had switched or were about to switch their electricity supplier.

Visitor numbers were higher in Wellington (43%). They were lowest among those over 60 (15%, up 7%), but were much higher among Māori (30%, down 4%) though care should be taken with this change due to the small sample size (n=60).

Website visits - powerswitch.co.nz

Similarly, (19%, down 3%) of those who were aware of any advertising encouraging people to find out how much they could save if they switched or who were aware of whatsmynumber.org.nz visited the website powerswitch.co.nz.

Of the 34% who had checked potential annual savings in the last three months, two-thirds (68%) had visited the website and 72% said they had switched or were about to switch their electricity supplier.

Visitor numbers were again higher in Wellington (28%). They were lowest among those over 60 (10%, no change) than those under 30 (30%, down 6%), but there were no significant differences by gender, ethnicity or location among those aware.

3. Topline tables

RESPONSIBLE FOR PAYING THE ELECTRICITY BILL *Are you responsible for paying the electricity bill in your household or have a say in who your electricity bill is?*	May 2011 %	July 2011 %	Oct 2011 %	Jun 2012 %
Yes	88	84	80	**85**
No	12	16	20	**13**
Unsure	-	-	-	**2**
Base: All respondents, n=750				

AGREE OR DISAGREE - YOU HAVE A CHOICE OF ELECTRICITY PROVIDER *Using a 1 to 5 scale where 1 means strongly agree and 5 means strongly disagree, how much do you agree or disagree that:* *"You have a choice of electricity provider"*	May 2011 %	July 2011 %	Oct 2011 %	Jun 2012 %
1 - Strongly agree	63	69	69	70
2	21	19	14	14
Total agree	**84**	**88**	**83**	**84**
3 - Neutral	**8**	**6**	**8**	**9**
4	2	3	2	3
5 - Strongly disagree	4	1	4	3
Total disagree	**6**	**4**	**6**	**6**
Do not know enough / Unsure	2	2	3	1
Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639				

AGREE OR DISAGREE - YOU CAN SWITCH ELECTRICITY PROVIDER *Using a 1 to 5 scale where 1 means strongly agree and 5 means strongly disagree, how much do you agree or disagree that:* *"You can switch electricity provider"*	May 2011 %	July 2011 %	Oct 2011 %	Jun 2012 %
1 - Strongly agree	60	66	63	66
2	19	19	15	14
Total agree	**79**	**85**	**78**	**80**
3 - Neutral	**11**	**6**	**10**	**9**
4	3	2	2	4
5 - Strongly disagree	5	5	5	5
Total disagree	**8**	**7**	**7**	**9**
Do not know enough / Unsure	2	2	5	2
Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639				

AGREE OR DISAGREE - IT'S EASY TO SWITCH ELECTRICITY PROVIDER

Using a 1 to 5 scale where 1 means strongly agree and 5 means strongly disagree, how much do you agree or disagree that:

"It's easy to switch electricity provider"

	May 2011 %	July 2011 %	Oct 2011 %	Jun 2012 %
1 - Strongly agree	42	47	48	49
2	21	25	18	18
Total agree	**63**	**72**	**66**	**67**
3 - Neutral	**15**	**12**	**14**	**12**
4	5	4	5	8
5 - Strongly disagree	8	7	5	6
Total disagree	**13**	**11**	**10**	**14**
Do not know enough / Unsure	9	5	10	7

Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639

AGREE OR DISAGREE - YOU CAN SAVE MONEY BY SWITCHING ELECTRICITY PROVIDER

Using a 1 to 5 scale where 1 means strongly agree and 5 means strongly disagree, how much do you agree or disagree that:

"You can save money by switching electricity provider"

	May 2011 %	July 2011 %	Oct 2011 %	Jun 2012 %
1 - Strongly agree	31	40	44	39
2	18	22	19	13
Total agree	**49**	**62**	**63**	**52**
3 - Neutral	**22**	**17**	**16**	**20**
4	10	6	7	9
5 - Strongly disagree	13	9	6	12
Total disagree	**23**	**15**	**13**	**21**
Do not know enough / Unsure	6	6	8	7

Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639

WORTHWHILE REVIEWING ELECTRICITY RETAILER

Do you believe it is worthwhile reviewing your electricity retailer on a regular basis?

	May 2011 %	July 2011 %	Oct 2011 %	Jun 2012 %
Yes	69	76	74	**74**
No	29	22	23	**22**
Unsure	2	2	3	**4**

Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639

REMEMBER ADVERTISING ABOUT SWITCHING POWER COMPANY

Can you remember seeing or hearing any advertising in the last two months encouraging people to find out how much they could save if they switched to a different power company?

	July 2011 %	Oct 2011 %	Jun 2012 %
Yes	92	86	**92**
No	6	12	**7**
Unsure	2	2	**1**

Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639

RECALL ORGANISATION IN ADVERTISING

As far as you can recall - what organisation or power saving initiative was the ad promoting?

	July 2011 %	Oct 2011 %	Jun 2012 %
What's my number	10.7	9.7	**18.5**
Power company (Meridian, Genesis, Mercury, Contact, Trustpower)	10.6	13.8	**14.6**
A website to help you to change or review power company	11.3	9.1	**8.1**
Powerswitch	6.0	5.6	**5.5**
Saving money / power	1.8	2.5	**1.5**
Insulation	-	-	**0.5**
Government or government organisation	0.9	1.2	**0.4**
Powershop	1.1	1.1	**0.4**
Consumer magazine	0.4	0.6	**0.2**
Electricity Authority	0.5	0.3	**0.2**
Other	1.7	1.5	**1.5**
Unsure	54.9	54.6	**48.6**

Base: 78% of ALL respondents, those who said they remember advertising about encouraging people to check how much they could save by switching power company, n=588

AWARENESS OF ADVERTISING

*I am going to describe an advertising campaign that show people being asked how much money they could save a year by switching to a different power company. The amount they could save is written on a note stuck to their forehead. The ad directs them to a website called **whatsmynumber.org.nz** to find out the answer. Please tell me if you have read, seen or heard this advertising campaign. Have you read, seen or heard it…:*

	July 2011			October 2011			June 2012		
	Yes %	No %	Unsure %	Yes %	No %	Unsure %	Yes %	No %	Unsure %
On television	88	11	1	85	14	1	**93**	**7**	**-**
In print such as in a newspaper or magazine	25	70	5	28	67	5	**25**	**69**	**6**
On the radio	28	69	3	20	76	4	**24**	**73**	**3**
A website	23	75	2	19	79	2	**23**	**76**	**1**
On a bus back	11	87	2	14	82	4	**12**	**85**	**3**
A billboard	9	89	2	10	87	3	**11**	**88**	**1**

Base: 64% of ALL respondents, those who had seen, read or heard the advertising campaign in the last two months but didn't mention What's My Number' as the organisation, n=479

WEBSITE VISITATION

As a result of this advertisement, did you…:

	July 2011			October 2011			June 2012		
	Yes %	No %	Unsure %	Yes %	No %	Unsure %	Yes %	No %	Unsure %
Visit the website **whatsmynumber.org.nz**	20	79	1	24	75	1	**26**	**74**	**-**
Visit the website **powerswitch.co.nz**	18	81	1	22	77	1	**19**	**79**	**2**

Base: 75% of ALL respondents, those who had seen, read or heard the advertising campaign in some media form (prompted) or who were aware of the what's my number advertising unprompted, n=562

LAST THREE MONTHS												
In the last three months have you...: (IN ORDER)	May 2011			July 2011			October 2011			June 2012		
	Yes %	No %	Unsure %	Yes %	No %	Unsure %	Yes %	No %	Unsure %	Yes %	No %	Unsure %
Discussed electricity options with others	42	58	-	48	52	-	44	56	-	**43**	**57**	**-**
Checked your potential annual savings on electricity if you were to change to a cheaper plan or provider	37	62	1	39	60	1	38	61	1	**34**	**65**	**1**
Contacted your existing electricity supplier to review your pricing plan	23	77	-	17	83	-	18	82	-	**19**	**81**	**-**
Contacted an electricity supplier different to your current provider	19	81	-	16	83	1	15	85	-	**16**	**83**	**1**
Switched electricity supplier or are about to switch	11	88	1	17	82	1	14	85	1	**16**	**83**	**1**

Base: 85% of respondents, those who are responsible for paying the electricity bill, n=639

SWITCHED BECAUSE OF WHAT'S MY NUMBER CAMPAIGN

Did you switch or are you thinking about switching as a result of the ad campaign "What's my number?"?

	July 2011 %	Oct 2011 %	Jun 2012 %
Yes	43	44	**40**
No	56	55	**58**
Unsure	1	1	**2**

Base: 14% of ALL respondents, those who indicated that they have switched or are about to switch electricity supplier, n=102

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