

Effectiveness of Competition in the ACT Electricity Retail Market- Residential Users

- Prepared for -

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1. EXECUTIVE SUMMARY

One thousand and two people in the ACT were surveyed by telephone in May 2010 to learn of their attitudes and behaviours regarding the home use of electricity and the companies that supply the service. The objective of the study was to assist the AEMC in their review of the competitiveness of the retail electricity market in the ACT. Key findings of the study were:

- 60% were aware they had a choice of suppliers
- 91% of the respondents were ActewAGL customers. More than half the sample (51%) could not name another electricity company servicing ACT
- More than three quarters of the sample said they had not been approached by an electricity company offering to sell the service; more than 90% have not approached a company themselves
- Only 10% have switched electricity companies since competitiveness came into effect in 2003. Better rates/prices were an important motivator. Bundling and green energy options were mentioned less frequently. Satisfaction with the current supplier and inertia were primary reasons for the lack of action
- People who switched electricity suppliers were generally satisfied with the process but found it difficult to make comparisons between the offerings of different companies. People who changed arrangement with the current supplier (20%) were also satisfied with the process. Cooling off periods were rarely utilised
- Lower prices were named as the prime factor that would encourage a switch of electricity provider. Four in five respondents said it was unlikely they would switch of change supplier arrangements in the next 12 months
- Few people complained to or contacted their electricity supplier. If there were an issue, the company was named as a likely point of contact
- There was very limited awareness of any independent assistance available to help make decisions about electricity in the ACT.

On balance, the survey results suggest that competitiveness is not strongly present in the ACT residential electricity market. One provider dominates the market. Switching is rare. Information about companies and offers are infrequently sought.

2. INTRODUCTION

2.1 Background

The AEMC's responsibilities include conducting a review of the effectiveness of retail competition in energy retail markets in each state and territory (except Western Australia). Since July 2003, full retail competition has been in place for electricity customers in the ACT. To what extent do the actions and attitudes of domestic users of electricity reflect this competitive environment?

In March 2010, Roy Morgan Research was commissioned to conduct qualitative and quantitative research in the ACT to shed light on these issues. The behaviour and attitudes of small-scale residential and business users of electricity in the ACT were assessed.

Upon completion of the research, the AEMC will recommend ways to:

- phase out price controls if competition is found to be effective; or
- promote competition where competition is found to be less than effective.

The assessment is required to be conducted on the basis of criteria developed by the Ministerial Council on Energy (MCE) in consultation with the AEMC and other stakeholders based on the following principles¹:

- **Independent rivalry within the market** – this promotes competition which according to economic theory should reduce price to a point near equilibrium
- **Ability of suppliers to enter the market** – this promotes competition by creating an open market for new competitors. It also identifies the extent to which a market is dominated by a few key players (i.e. an oligopoly)
- **The exercise of market choice by customers** – indicates customer engagement in their choice and their ability to act as rational agents, driving competitive markets to be efficient
- **Differentiated products and services** – differential offerings aim to meet the differing needs of consumers
- **Price and profit margins** – a large profit margin indicates that markets are not price competitive, economic theory suggests that if markets are truly competitive profit margins will be at or close to zero
- **Customer switching** – transfer rates can indicate customer interest and activity in the competitive market.

¹ AEMA, Clause 14.11 (a) (i) and Annexure 3 as amended in June 2006

3. RESEARCH OBJECTIVES

The overall objective of the consumer research is to provide key information about the ACT electricity market to assist in an analysis of the effectiveness of competition.

3.1 Qualitative Research among Small-scale Energy Consumers

Four focus groups were conducted with small-scale domestic and business consumers of electricity in the ACT. The report of the qualitative phase was issued earlier in June 2010.

3.2 Quantitative Research among Small-scale Energy Customers

The quantitative research among domestic (residential) energy consumers is reported here. The report on business consumers is reported separately.

The quantitative research into residential use of electricity in the ACT evaluated whether consumers were aware that they can choose their energy supplier and whether they were relatively well informed about the types of service offerings available in the market. In order to achieve this, the study specifically aimed to determine the following:

- Consumer awareness of competition and opportunities to choose and switch energy retailers
- The extent to which small scale electricity users switch energy retailers for their home
- The extent to which small scale residential users of electricity respond to retailer marketing activities
- The ease of obtaining, understanding and comparing information about energy options
- The incidence of switching behaviour, including considerations and actions taken
- Attitudes to products offered by energy retailers (including service packages and niche offerings such as green energy)
- Other perceptions and experiences with the energy market in ACT.

4. METHODOLOGY

4.1 Sample

4.1.1 Definition of Qualified Survey Participant

A qualified respondent lived in an ACT household and was responsible in full or in part for decisions about the purchase of electricity. Respondents had to be users of electricity.² People were excluded if they or anyone in the immediate household worked for ActewAGL³.

4.1.2 Recruitment

The Roy Morgan Research CATI (computer assisted telephone interviewing) team in Melbourne administered the recruitment screener and the survey itself. All interviews were conducted in English.

Telephone numbers in the computer-based listings for residential ACT were used as the sampling source.⁴ Calls were made weekday evenings and during daytime on the weekends. Confidentiality was ensured. The AEMC was mentioned as the sponsor of the project during the introductory section of the screener if the respondent requested the information. Up to four telephone call attempts at varied time were made before abandoning a number. No financial incentive was offered to complete the survey.

4.1.3 Quotas

Respondent demographic characteristics were allowed to “fall naturally,” i.e., no quotas were placed on the sample for respondent gender, age, neighbourhood, income, household structure, or type/size of home.

² It was assumed that all households in ACT were small-scale electricity users. There was no screening question regarding kWh consumption.

³ Throughout this report, the company is referred to ActewAGL rather than ActewAGL Retail, following usage observed in the sessions. Whether talking about infrastructure (poles and wires) or customer service, participants in the focus groups routinely referred to the company as Actew or ActewAGL, not ActewAGL Retail. They were aware that ActewAGL has retail locations, i.e., energy shops/stores in the ACT, but this did not affect their terminology.

⁴ Calls to mobile numbers were not made because they do not guarantee the person is actually living in ACT. Unlisted “silent” numbers were also not called.

4.2 Questionnaire Design

Roy Morgan Research and AEMC collaborated on the creation of the questionnaire which was based on the survey used in other states for a similar purpose.

4.3 Dates of Field Work

4.3.1 Pilot Phase

An n=7 person pilot phase was conducted on 12 May 2010 to confirm that the survey logic functioned properly and there were no questions or issues from respondents relating to the survey questions. No substantive problems were reported. The data collected from the qualified ACT participants in the Pilot were merged into the overall data set.

4.3.2 Main Phase

Interviewing was conducted from 15 May to 24 May 2010. A total of 1002 surveys were completed. The average survey length was approximately 13 minutes.

4.4 Weighting Procedure

Data was weighted to household size statistics in the ACT drawn from Roy Morgan Research Single Source.

4.5 Sampling Variance / Reliability

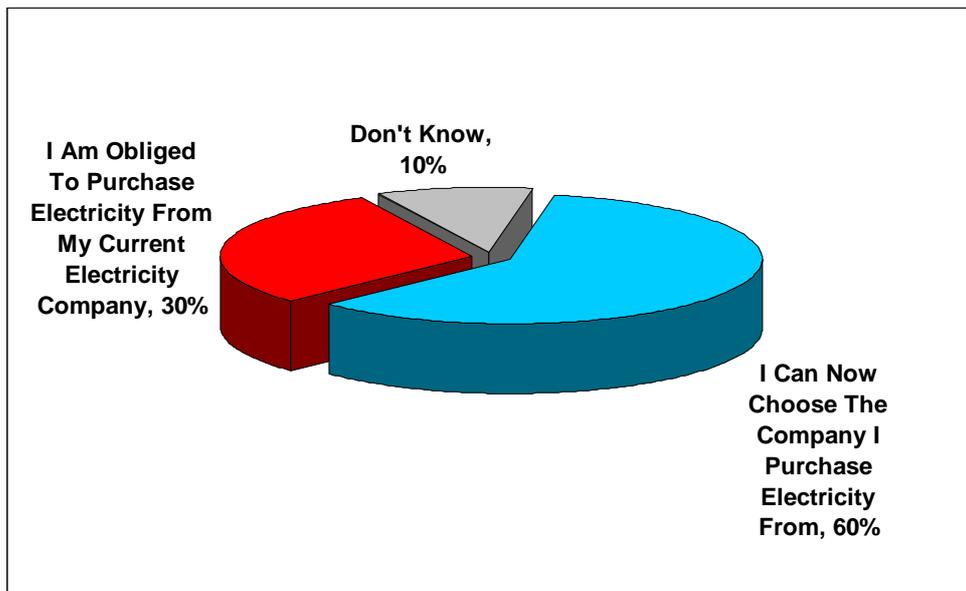
A sample size of 1000 estimates population statistics with an accuracy of $\pm 3\%$ at the 95% confidence level.

5. FINDINGS

5.1 Current Behaviour

Perhaps the most basic measure of the competitiveness in the ACT for the provision of residential electricity is the simple judgement whether it is possible to choose among companies providing the service. Twice as many people stated that choice was available to them as not (60%-30%) with the remainder unsure (Figure 1). Given that choice was introduced in 2003, the finding that 40% did not answer affirmatively provides some evidence for perceived competitiveness in the ACT but there is much room for improvement.

Figure 1: Awareness of Choice of Electricity Company

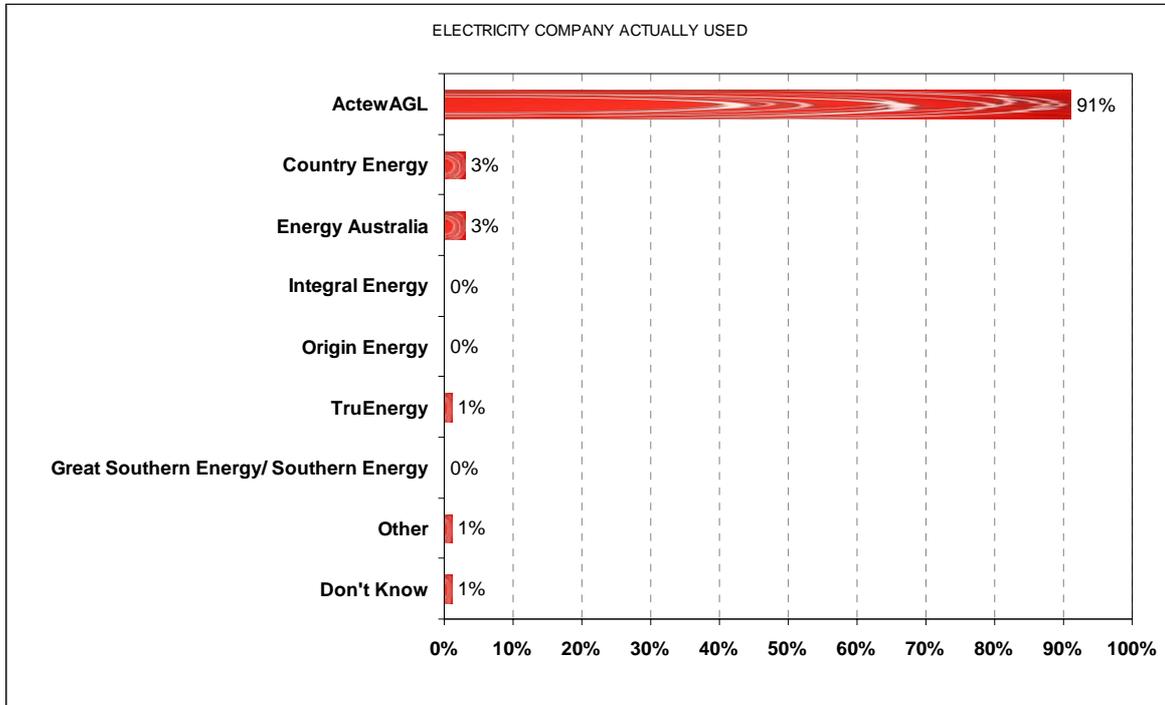


Base: Total Sample (n=1002)

Q4. As far as you are aware, which of the following statements applies to you?

Slightly more than 90% of participants are currently ActewAGL customers (Figure 2).

Figure 2: Electricity Company Used



Base: Total Sample (n=1002)

Q5. What company do you buy electricity from for your current dwelling in the ACT?

Table 1 shows what other companies could be named by customers of the top three suppliers. More than half the sample (50.5%) could not name another electricity company servicing ACT (see Don't Know/Not Sure column). This finding is heavily driven by the 52% of ActewAGL customers who could not name another provider. Among customers of Country Energy and Energy Australia, ActewAGL was named as another company by 39% and 85% respectively.

Table 1⁵. Awareness of other Companies Offering Electricity as a Function of Current Supplier (Top Three Suppliers Only)

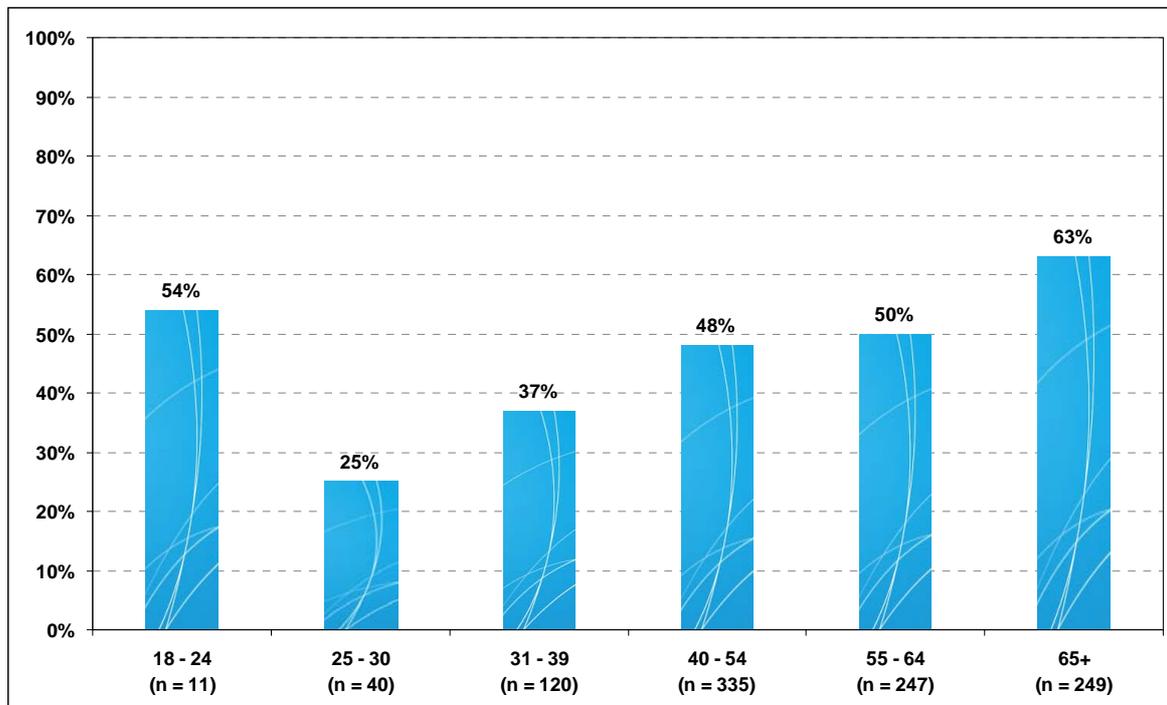
	ActewAGL	Country Energy	Energy Australia	Integral Energy	Origin Energy	Truenergy	Great Southern Energy/ Southern Energy	Other	Don't Know/ Not Sure/ Can't Say
ActewAGL	na	19.00%	6.20%	2.40%	8.20%	1.50%	2.70%	2.60%	52.20%
Country Energy	39.40%	na	0.00%	5.50%	0.00%	0.00%	0.00%	0.00%	46.50%
Energy Australia	85.10%	14%	na	2.50%	2.50%	2.50%	0.00%	5.20%	14.90%
TOTAL									50.5%

Base: Customers of Top Three Companies (n=978)

Q6. What companies do you think you could buy electricity from?

Additional analysis reveals that respondent age influences awareness of other companies. Aside from the youngest age group (18-24 year olds) with only n=11, the overall trend of awareness of other companies decreases as age increases as illustrated by Figure 3 below. One possible reason for this trend is that the older age groups by definition are more likely to have been residents of the ACT when ActewAGL was the only company available.

Figure 3: Unaware of any other Companies Offering Electricity by Age



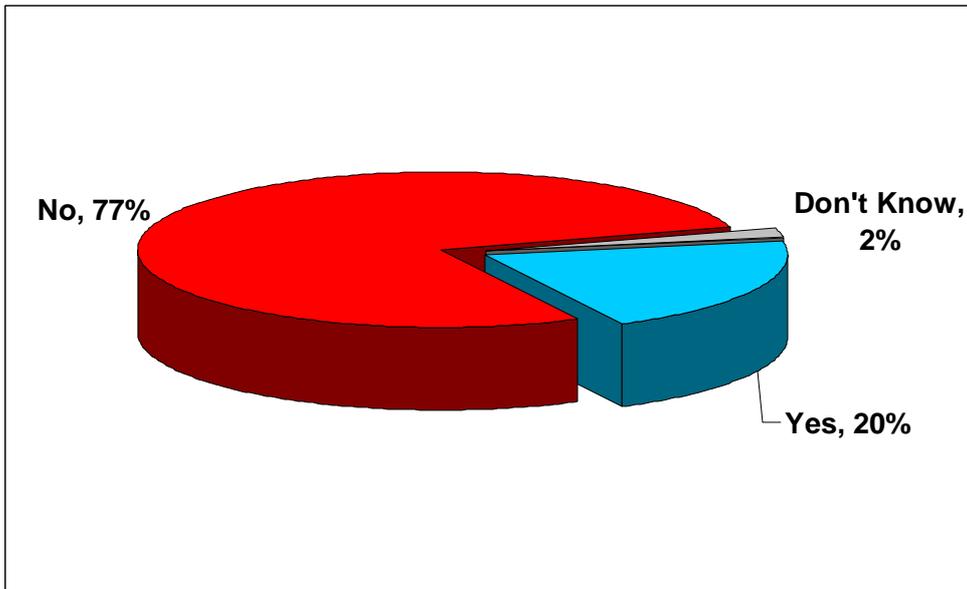
Base: All respondents (n=1002)

Q6. What companies do you think you could buy electricity from?

⁵ Note: Rows do not add to 100%: some people when asked for another supplier also named their own current supplier. These answers are excluded

Nearly 8 in 10 households (77%) claimed not to have been approached in any way by an electricity company offering to sell electricity. Note that this question did not specify a time period so it could have been construed as “ever approached.”

Figure 4: Was Approached By an Electricity Company to Sell Electricity

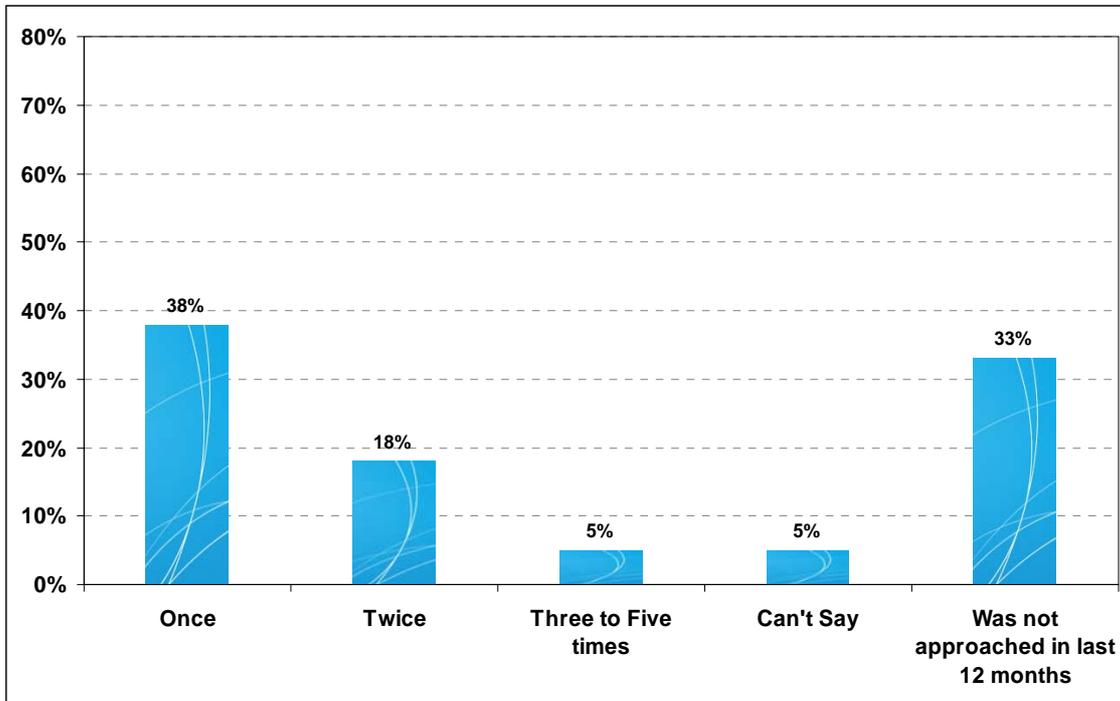


Base: Total Sample (n=1002); Totals do not add to 100% due to rounding.

Q7. Have ANY electricity companies approached your household by any means and offered to sell you electricity?

Of those who had been approached, most (56%) had been contacted once or twice in the past 12 months. A third had not been contacted that recently (Figure 5).

Figure 5: Number of Times Approached In Last 12 Months

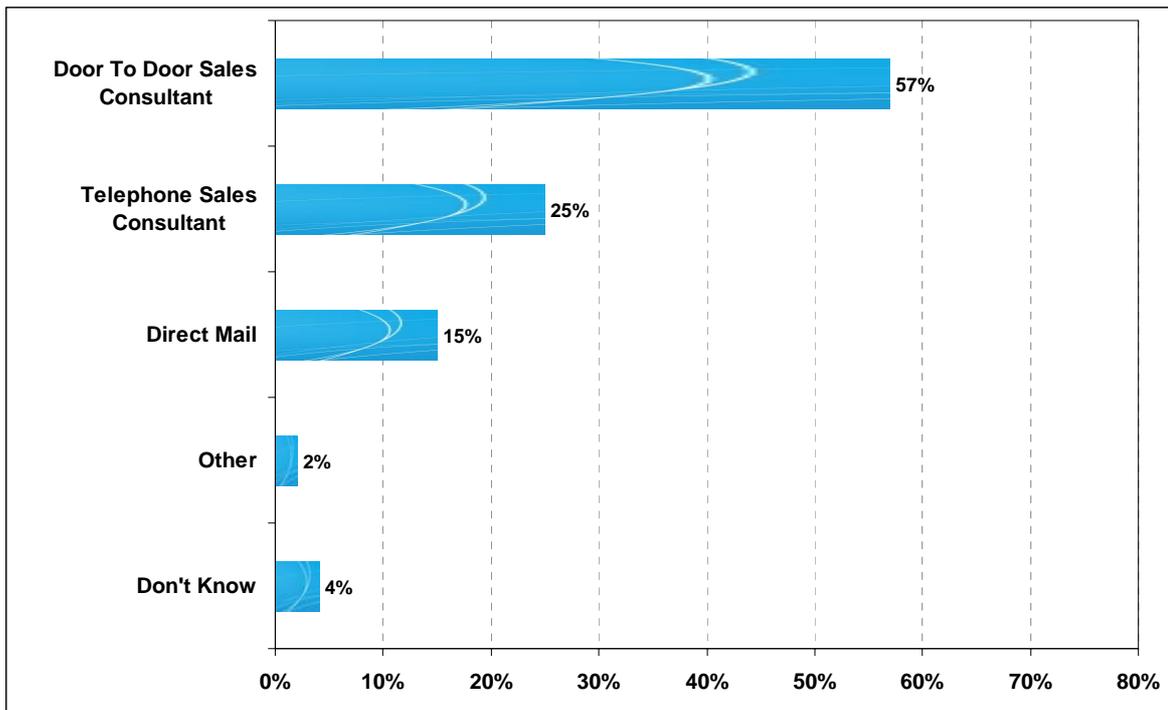


Base: Respondents who have been approached by elec. company (n=206)

Q7a. How many times have you or others in your household been approached in the last 12 months?

Figure 6 shows that door-to-door sales calls were the most common method of offering electricity services (57%) followed by telephone (25%) for the most recent electricity company approaching the home.

Figure 6: Method Company Used To Approach Household

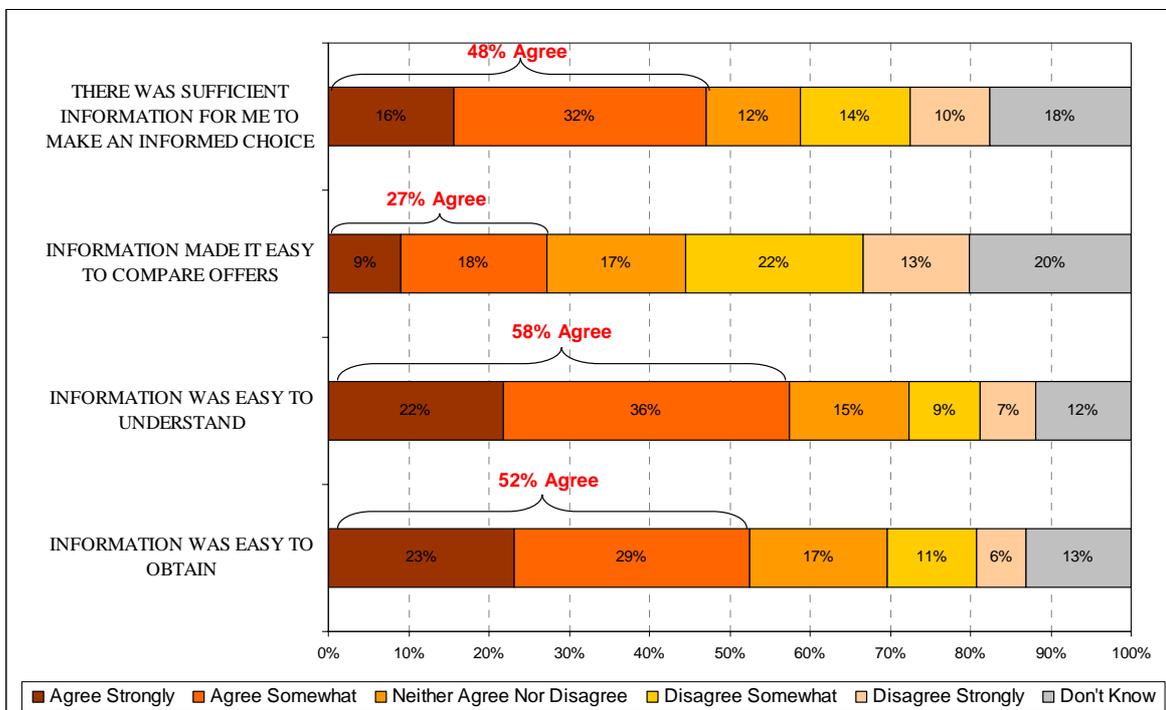


Base: Respondents who have been approached by elec. company (n=206)

Q8. Thinking about the last electricity company who contacted you, how did they approach you?

For those who were approached by an electricity company, a majority agreed the information was easy to obtain and understand (Figure 7). A near majority (48%) said there was sufficient time provided to make an informed choice. The 25% who did not agree to this statement can be taken as an index of general discomfort with door-to-door sales offers or a specific reflection of pressures to change service arrangements or providers, among other possibilities. Only 27% agreed that information made comparisons easy to make.

Figure 7: Factors Associated with Electricity Company

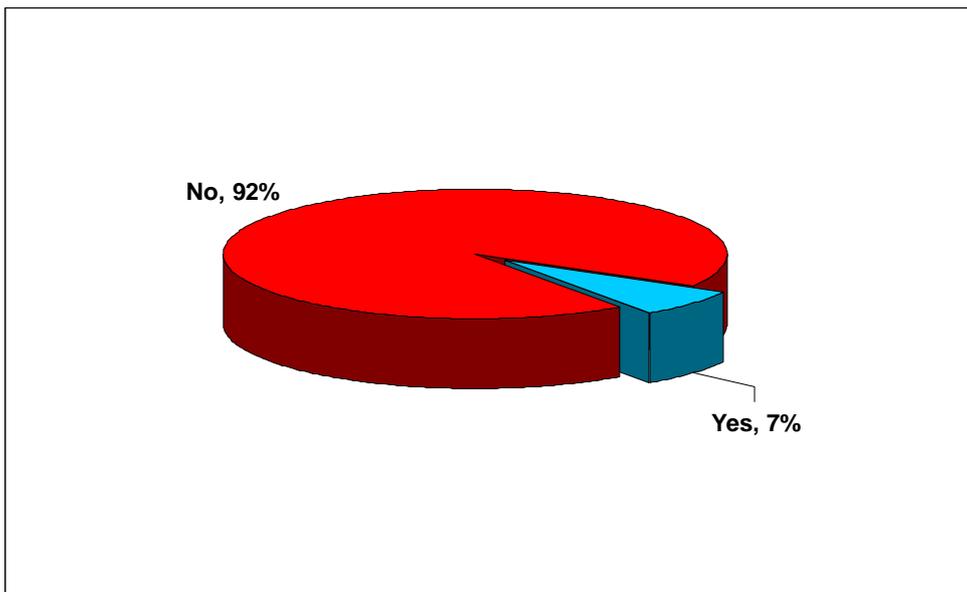


Base: Respondents who have been approached by electricity company (n=206)

Q8a-d. Thinking about the information given to you by an electricity company, please rate your level of agreement with the following statements.

Whereas 20% were approached by electricity companies, Figure 8 shows that the reverse was far rarer: very few people approached electricity companies for information about purchasing electricity (7%). This may be due to inertia, satisfaction with the current supplier, or lack of knowledge of other companies.

Figure 8: Whether Approached Any Electricity Companies to Buy Electricity

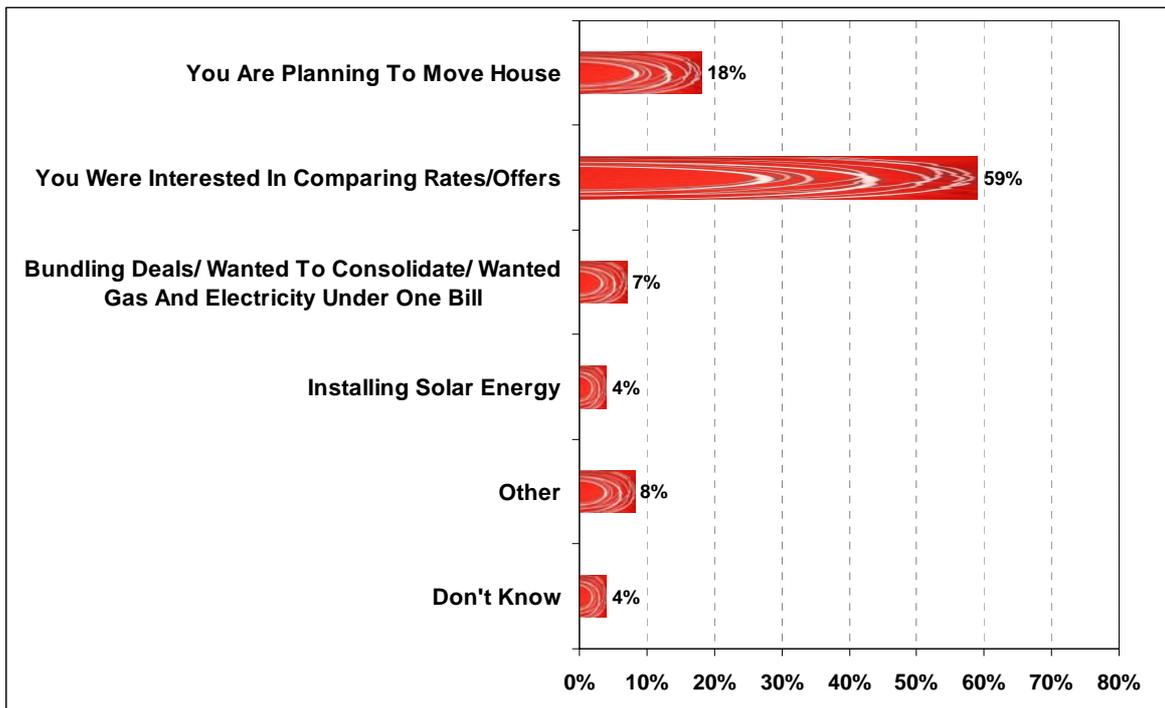


Base: Total Sample (n=1002); Totals do not equal 100% due to rounding and omission of “don’t know.”

Q9. Have you approached any electricity company or companies, including your existing company, to ask about buying electricity from them?

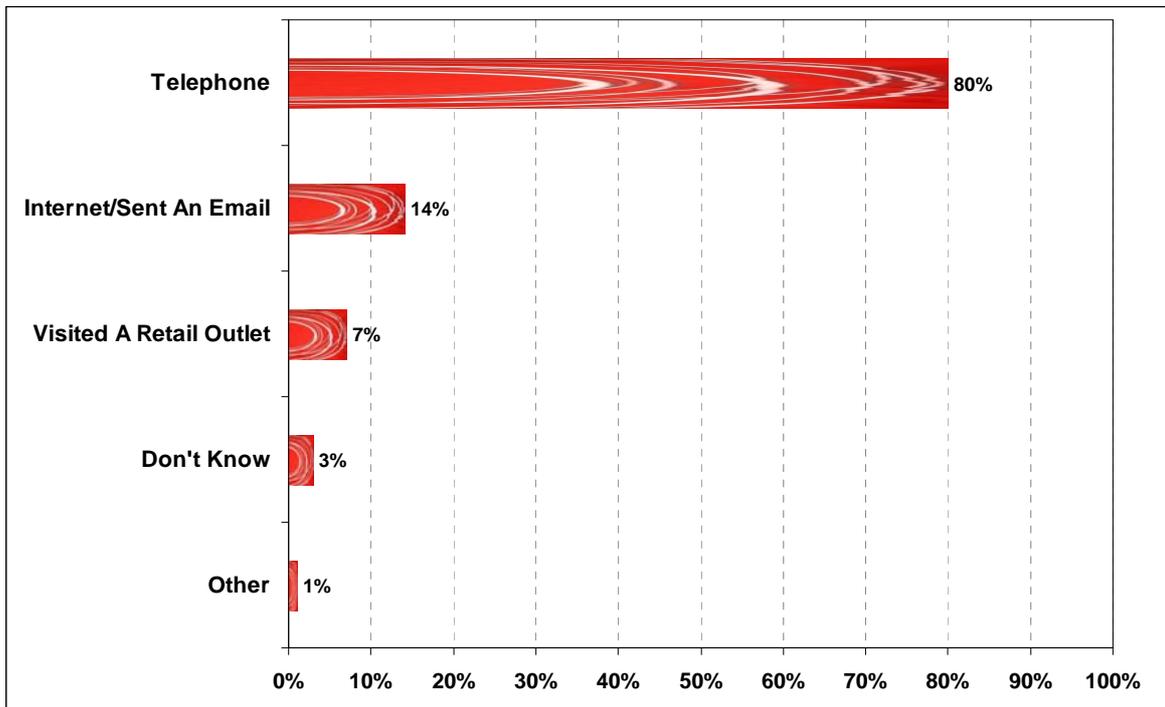
Of those who had approached an electricity company, a majority (59%) did so to make rate comparisons. Moving house was not a prime motivator (Figure 9). Figure 10 shows that the telephone was the most common method to approach the company (80%) followed by internet/e-mail (14%) and retail outlet visits (7%).

Figure 9: Reason for Approaching Any Electricity Companies



Base: Those who approached an electricity company to ask about buying electricity respondents (n=71)
Q10. Did you approach the electricity company because...?

Figure 10: Methods Customers used to Approach Electricity Suppliers

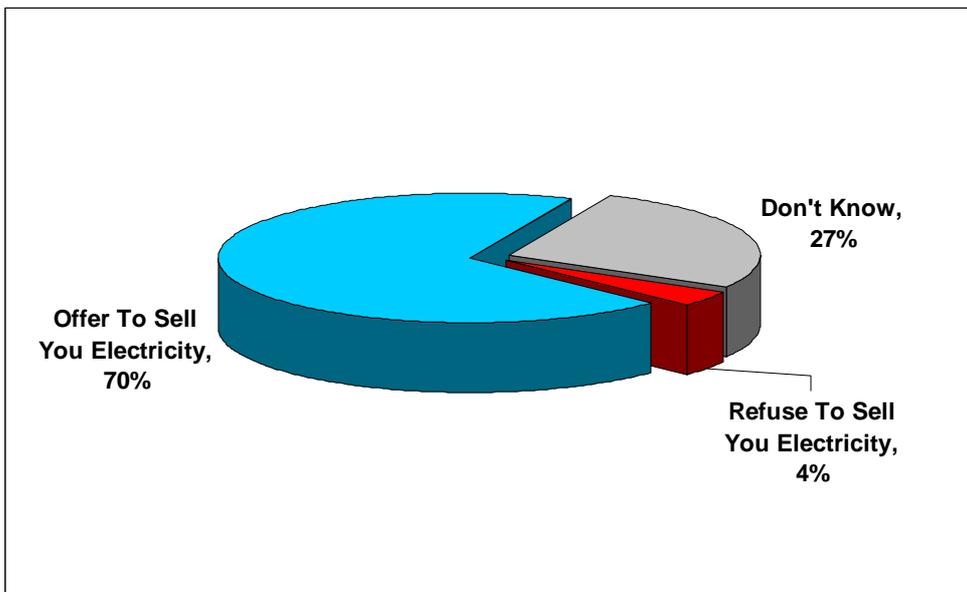


Base: Those who approached an electricity company to ask about buying electricity respondents (n=71)

Q11. Thinking about the last electricity company you approached, how did you do this?

Figure 11 indicates that people who were approached by an electricity company or themselves approached the company were usually offered the service (70%). In only 4% of the occasions was there a refusal to sell electricity.

Figure 11: Refusal/Offer to Sell Electricity



Base: Respondents who approached by or approached an electricity company (n=252)

Totals do not equal 100% due to rounding.

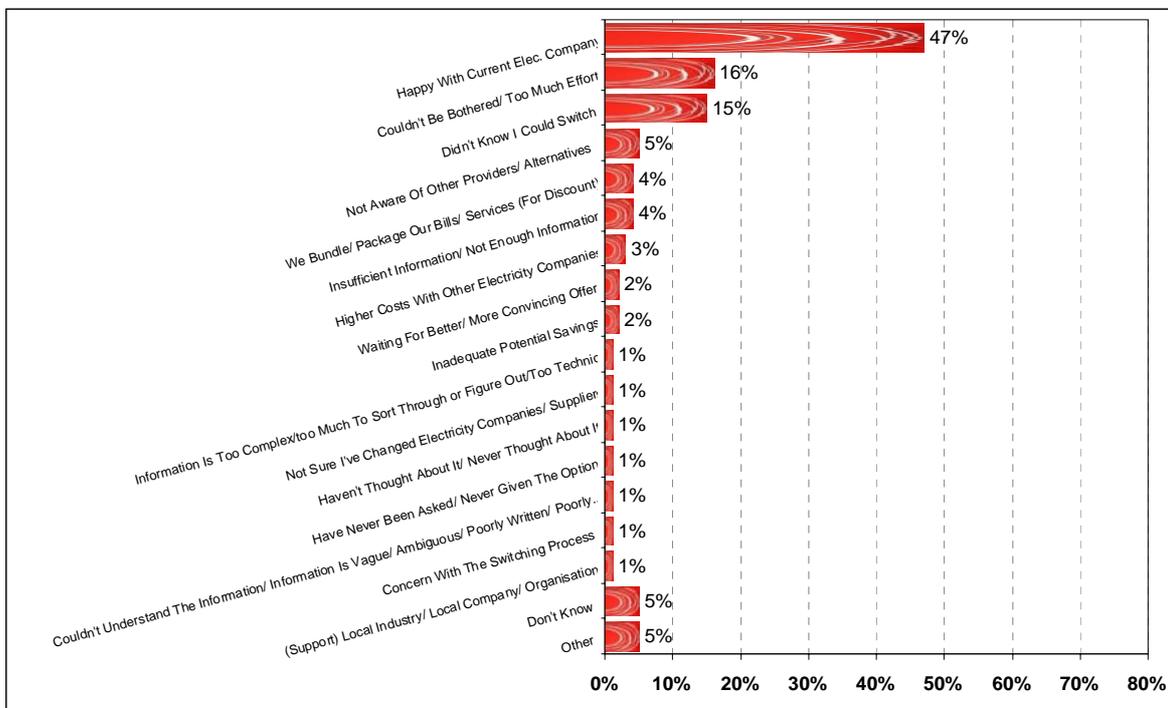
Q12. Did the company offer or refuse to offer to sell you electricity?

Of the 4% who were refused the sale, a third indicated that the company did not service their area. Other comments were divided between “Don’t Know” and “Other”.

5.2 Switching

Of the total sample of 1002 respondents, only 10% had switched electricity companies since July 2003 when competition began in ACT. Nearly 90% has not switched (89%). Not surprisingly, the most common reason for not switching was satisfaction with the current supplier (47%, see Figure 12). Smaller numbers of people, approximately 15%, cited inertia (“couldn’t be bothered”) or a lack of awareness that switching was possible.

Figure 12: Reasons for Not Changing Electricity Company since July 2003

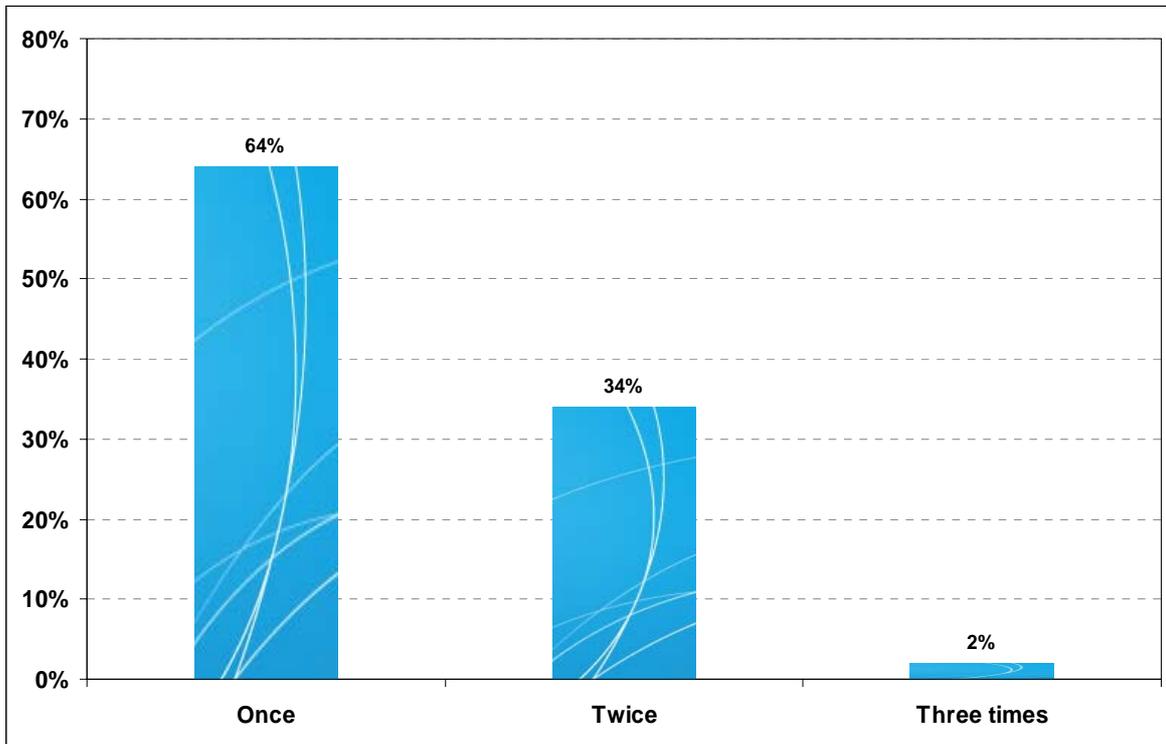


Base: Have not switched or don't know (n=900)

Q20. Why haven't you changed your electricity company?

For those that did switch, Figure 13 shows that switching generally entailed a change to one different company (64%), not a serial switching process (36% answered two or more).

Figure 13: Number of Times Switched Electricity Companies

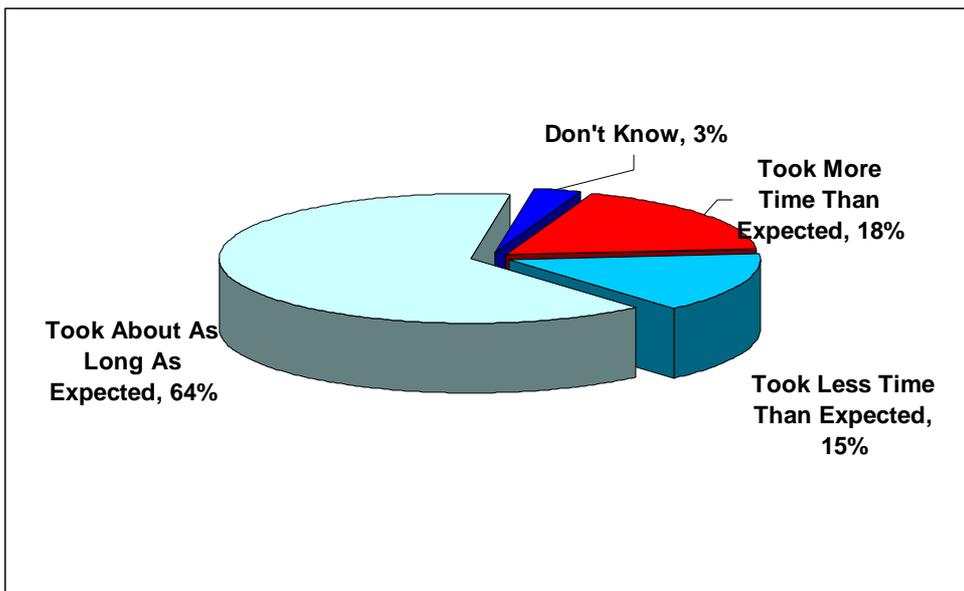


Base: Respondents who switched electricity companies (n=102)

Q14. How many times have you switched electricity companies in the ACT since July 2003?

For those who switched, the experience was generally a positive one. The process took about as long as expected (64%) and was easy (85%) (Figure 14 and Table 2). In addition, the explanation received about the switching process was rated good to excellent by 75% of the respondents (Figure 15). For 86% of switchers, the process transpired about as expected (Table 3).

Figure 14: Time that Switching Process Took



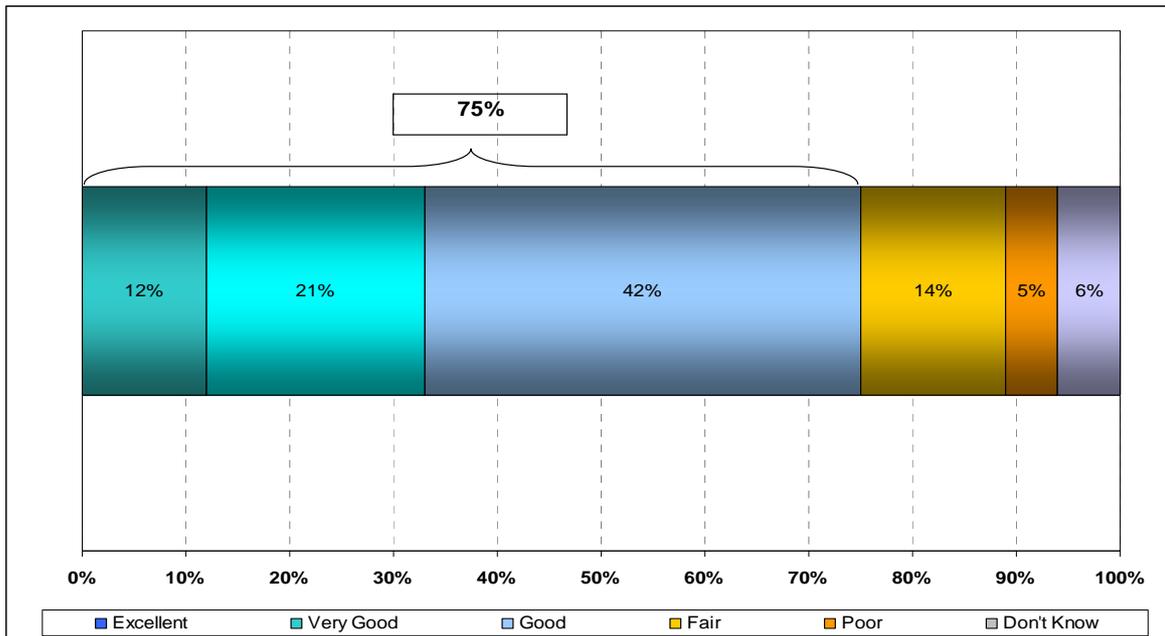
Base: Respondents who switched electricity companies (n=102)
Q15a. Would you say the switching process ...?

Table 2: Ease of Switching Electricity Companies

Very easy	Somewhat easy	Neither easy nor difficult	Somewhat difficult	Very difficult	Don't know
61%	24%	4%	9%	1%	2%
85%					

Base: Respondents who switched electricity companies (n=102)
Q15. The last time you switched your electricity company, how easy was the switching process?

Figure 15: Rating Of Explanation about the Switching Process



Base: Respondents who switched electricity companies (n=102)
 Q15b How would you rate the explanation of the switching process?

Table 3: Whether Switching went as Smoothly as Expected

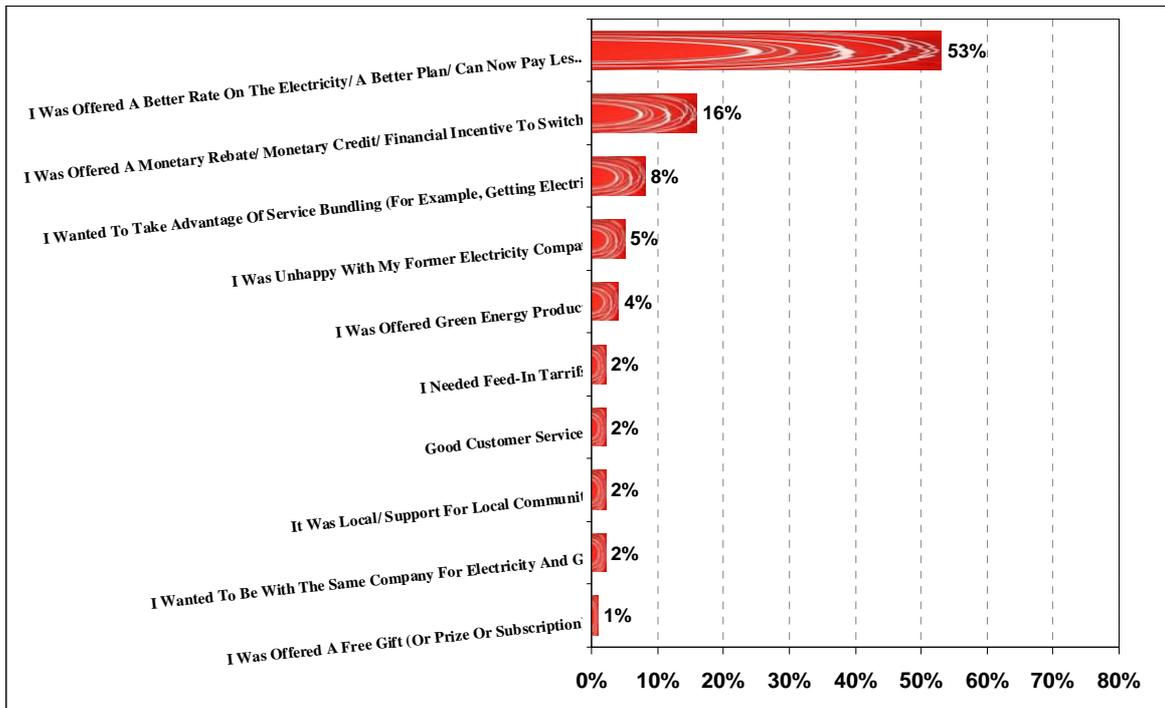
Yes	87%
No	12%
Don't Know	1%

Base: Respondents who switched electricity companies (n=102)
 Q15c. Did the switching process go smoothly, as expected?

There was no pattern to the comments from respondents who mentioned that the switching did not go smoothly (n=13).

Figure 16 shows that reasons for switching focussed on general service/plan improvements (53%), money (16%), and bundling (8%). Moving home was not a common motivator for switching suppliers. Only 10% mentioned this reason (Figure 17).

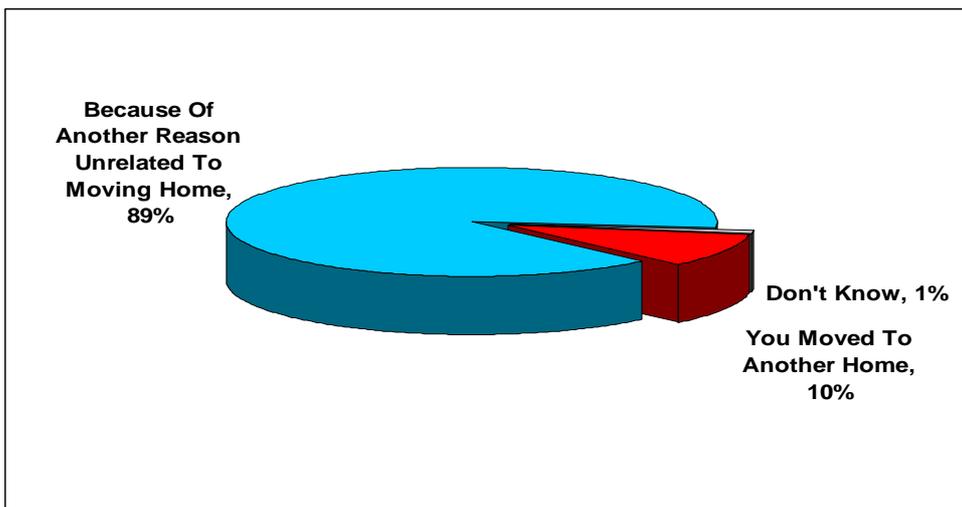
Figure 16: Main Reason for Switching Providers



Base: Respondents who switched electricity companies (n=102)

Q16. The last time you switched your electricity company, what was the one most important reason for your decision?

Figure 17: Moving Home as Motivation for Switching



Base: Respondents who switched electricity companies (n=102)

Q17 The last time you switched your electricity company, did you do this because...?

Satisfaction with the new electricity provider was strong for the 10% who had switched. Three of four of these respondents (75%) were either very satisfied or somewhat satisfied (Table 4). Figure 18 shows that reasons for the satisfaction with switching centred on the “lack of hassles” in the process and better prices (each 35%), followed by references to customer service (15%). There was no pattern to the comments from the six people who were not satisfied.

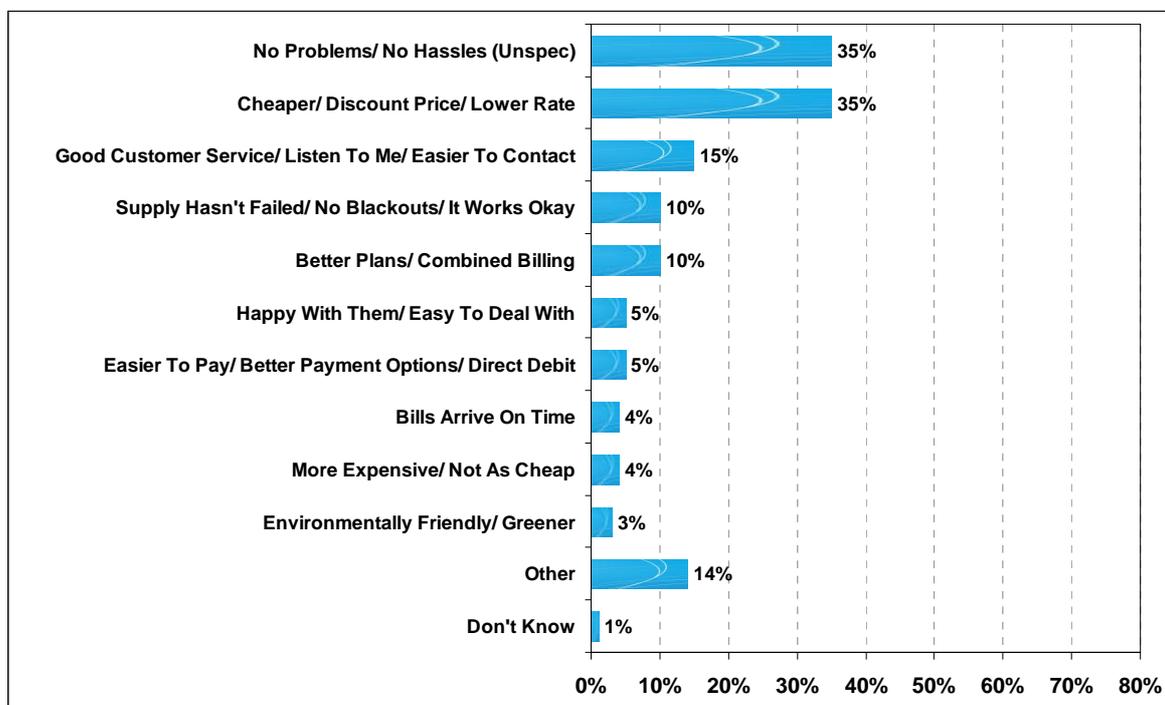
Table 4: Satisfaction with New Provider

Very Satisfied	32%
Somewhat Satisfied	43%
TOTAL SATISFIED	75%
Neither Satisfied Nor Dissatisfied	15%
Somewhat Dissatisfied	3%
Very Dissatisfied	4%
TOTAL DISSATISFIED	7%
Don't Know	3%

Base: Respondents who switched electricity companies (n=102)

Q18 Overall, how satisfied or dissatisfied are you with your new electricity company?

Figure 18: Reason Satisfied With New Provider



Base: Respondents satisfied with the switch to new electricity companies (n=76)

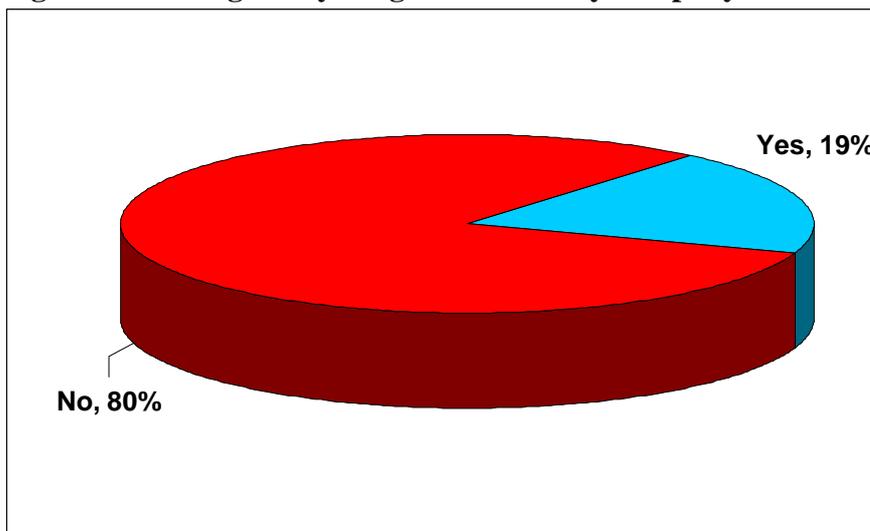
Q18b Why are you satisfied with your new electricity company?

5.3 Use of Cooling Off Period and Changing of Arrangements with Current Supplier

While switching service providers is perhaps the most obvious method of measuring the consumer follow-through resulting from a more competitive retail market for electricity, another measure is the change arranged to service plans whilst remaining with the current provider.

Figure 19 shows that the use of this strategy was fairly limited. Only 19% of those who had not switched suppliers, had changed electricity supply arrangements. A cooling off period was used by only 3% of the total sample (Figure 20). Additional data analyses revealed that a cooling off period was used by 7% of those who changed electricity suppliers and by 2% of those who just changed electricity supply arrangements.

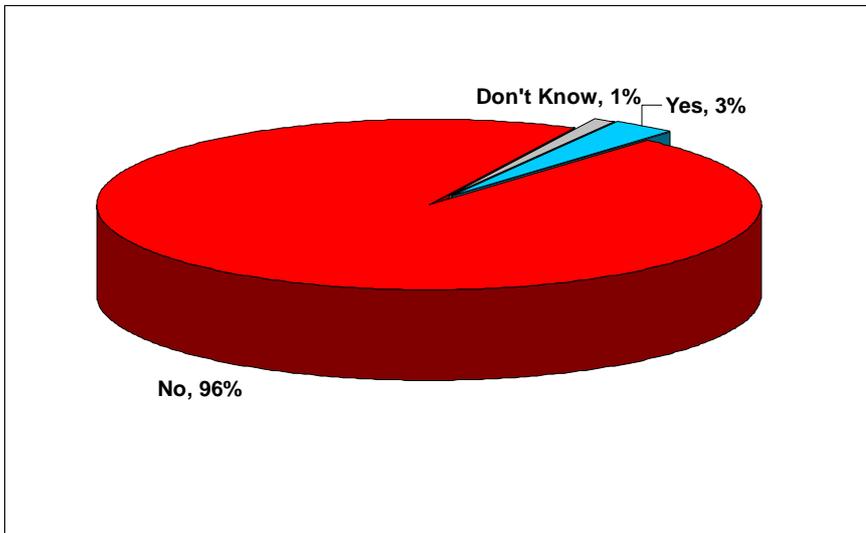
Figure 19: Changed anything about the way company sells electricity to you



Base: Have not switched suppliers or don't know (n=900); Totals do not equal 100% due to rounding and omission of "don't know."

Q21. Have you changed anything about the way your electricity company sells electricity to you?

Figure 20: Entered into Contract and used Cooling-off Period to Cancel

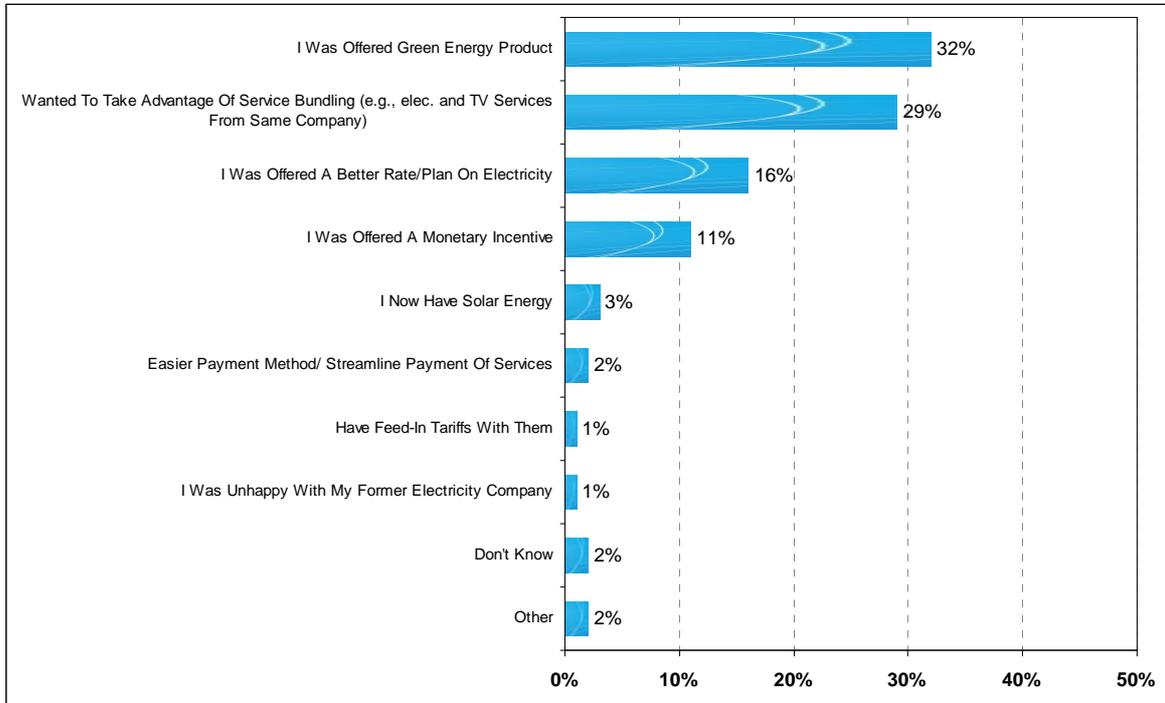


Base: Total Sample (n=1002)

Q19. Have you, at any stage, entered into a contract and used a cooling off period to cancel the contract?

Figure 21 shows that the three most frequently mentioned reasons for changing supply arrangements were green energy offers (32%), bundling (29%), and better prices (16%). References to green energy and bundling imply that supplier literature and promotional information are able to engage the customer and affect behaviour regarding utility usage. Moving home was cited by 13% as a trigger for changing supply arrangements (Figure 22).

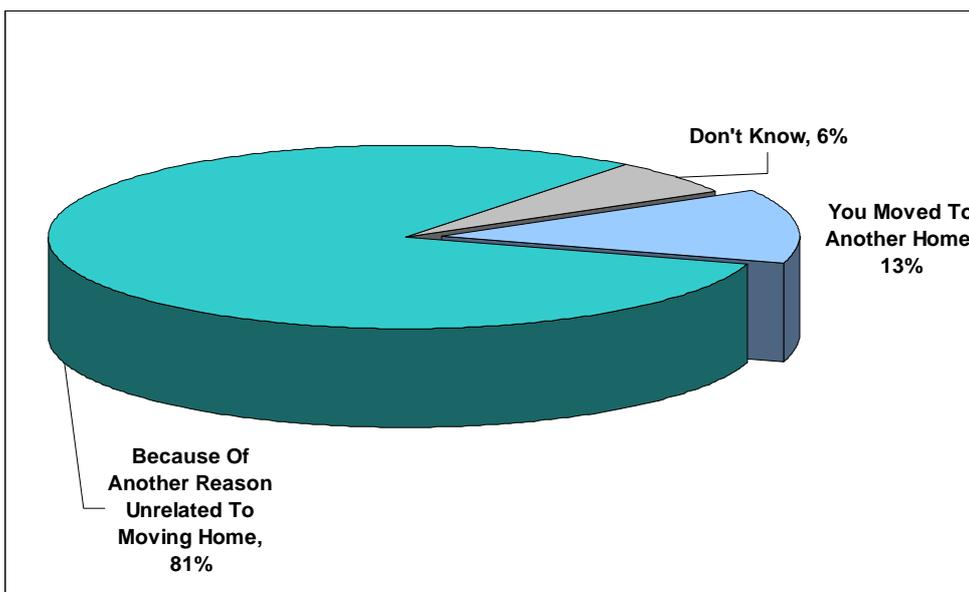
Figure 21: One Main Reason for Changing Electricity Supply Arrangements with Current Company



Base: Have changed arrangement with electricity company (n=179)

Q22. Thinking about the last time you changed your electricity supply arrangements with your electricity company, what was the one main reason for your decision?

Figure 22: Role of Moving Home in Changed Arrangement with Electricity Company

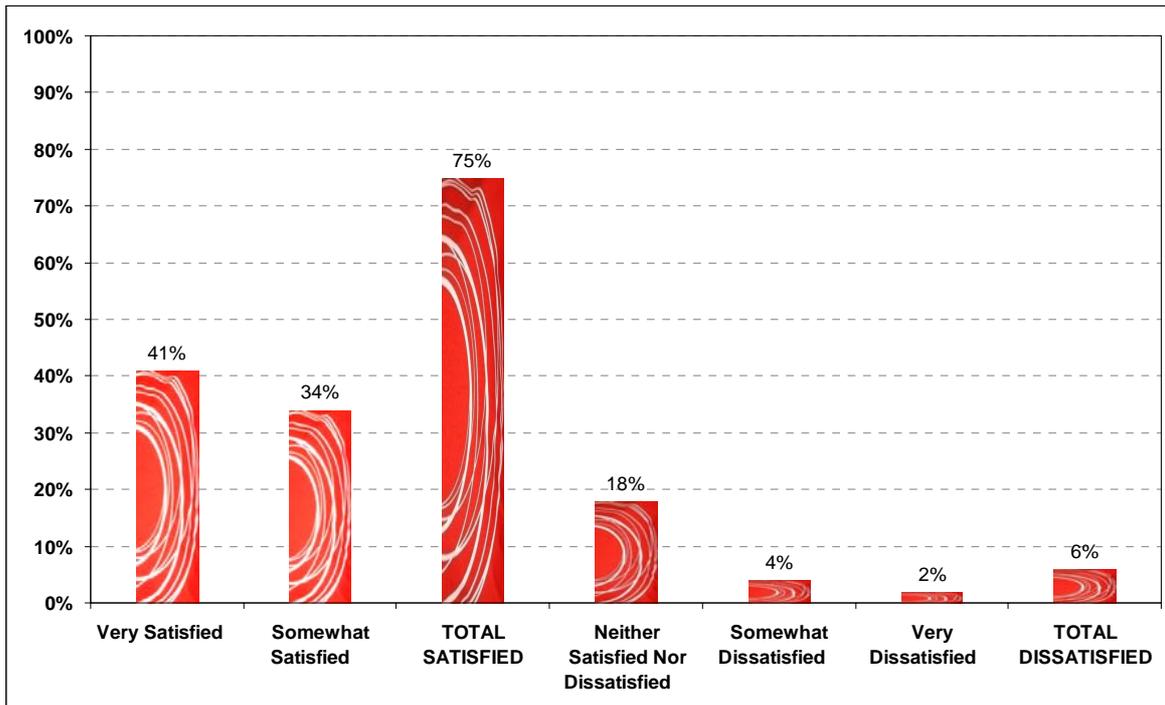


Base: Have changed arrangement with electricity company (n=179)

Q22a Thinking about the last time you changed your electricity supply arrangements with your electricity company, was this because...?

Satisfaction with the new arrangements was high with 75% very or somewhat satisfied compared to only 6% who were dissatisfied (Figure 23). Reasons for dissatisfaction among the 11 people who had that view were not focused on any one topic.

Figure 23: Satisfaction/Dissatisfaction with New Electricity Supply Arrangements

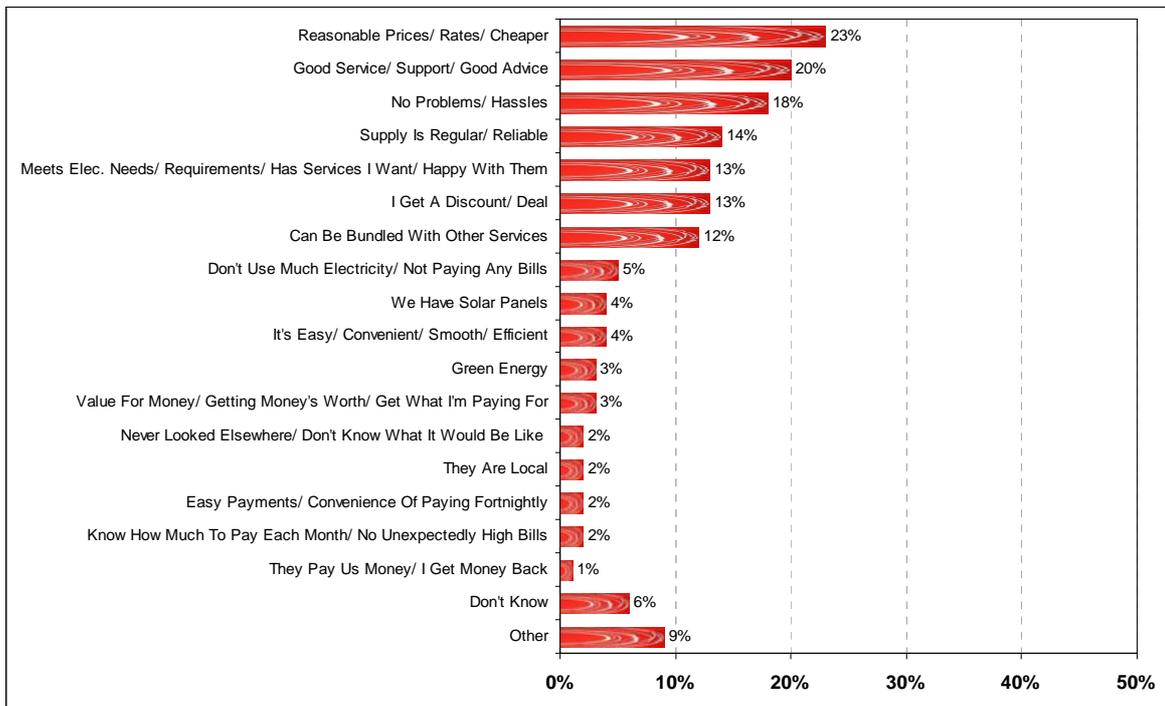


Base: Have changed arrangement with electricity company (n=179)

Q23. How satisfied or dissatisfied are you with the new electricity supply arrangements?

Reasons for satisfaction with the new arrangements reflected general principles: better prices (23%), customer support (20%), and no hassles (18%). Bundling and green/solar energy figured lower down on the list (Figure 24).

Figure 24: Reasons for Satisfaction with New Electricity Supply Arrangements

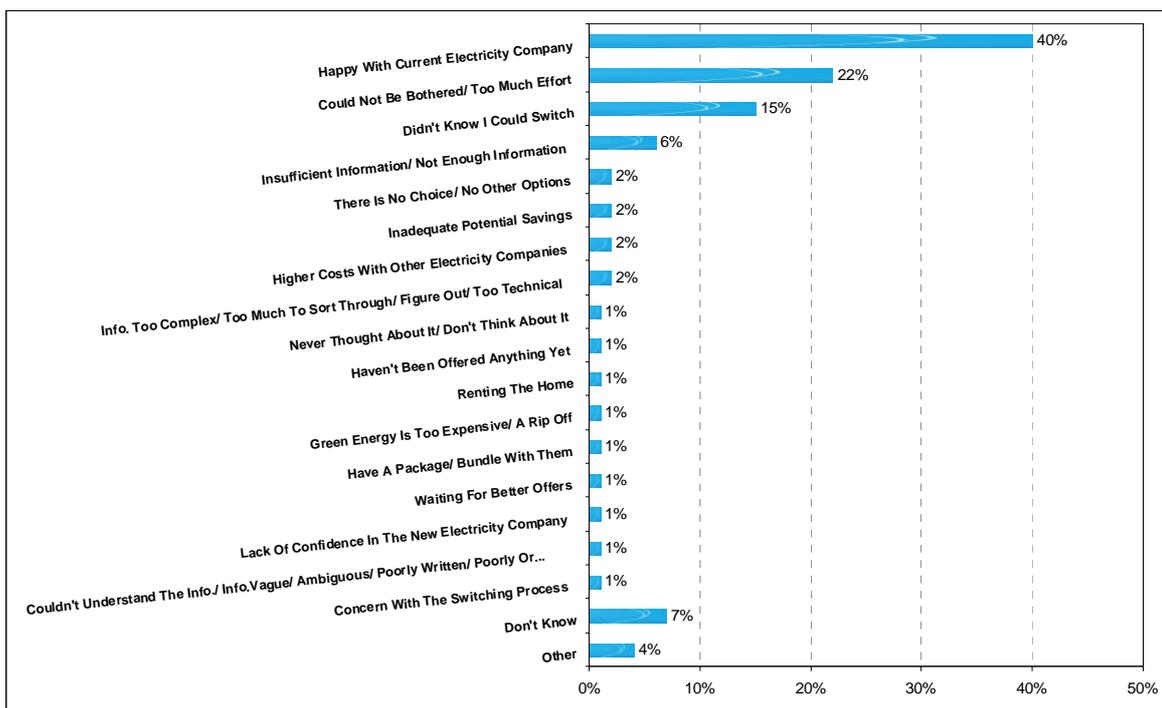


Base: Satisfied with change arrangement with electricity company (n=134)

Q23b. Why were you satisfied?

For those who had not changed the way they purchased electricity from their current supplier, reasons closely mirrored the ones cited earlier when respondents were asked why they had not switched suppliers. Common reasons were satisfaction with the current company, inertia, and a lack of awareness that changes of that sort were possible (compare Figure 25 with Figure 12).

Figure 25: Why Haven't You Changed the Way You Buy Electricity?



Base: Have not changed companies and not changed service arrangement with electricity company (n=717)

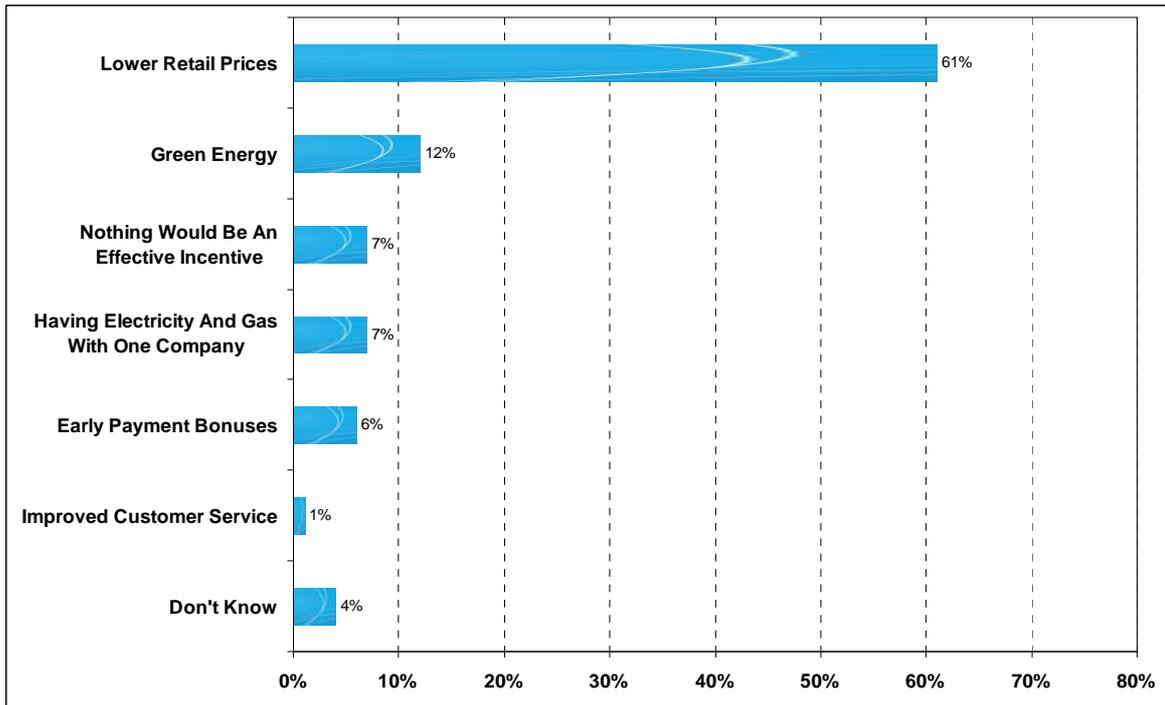
Q24. Why haven't you made any changes to the way you buy electricity?

5.4 Changing Behaviour

What incentives, if any, would encourage people to change companies or supply arrangements? Figure 26 shows that lower prices was clearly the most popular answer (61%), followed by green energy (12%). Only 13% of participants in the study felt that there were more offers available from electricity companies now than 12 months ago (Figure 27). If competition for residential electricity business in ACT is modulating price increases, keeping prices down, or yielding an array of pricing plans, most have not yet seen it or been convinced.

Figures 28-9 offer a look into the future. A far larger number of respondents (79%) are not planning to change supplier arrangements in the next 12 months compared to those who are (14%). The same pattern was obtained for plans to switch electricity companies (80% vs. 12%).

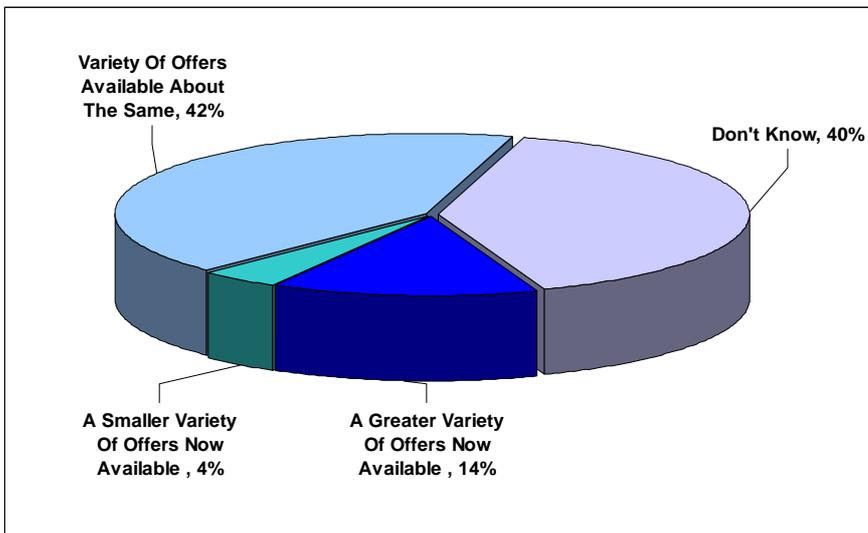
Figure 26: One Most Effective Incentive to Encourage Changing Electricity Companies or Way You Buy Electricity



Base: Have not changed arrangement with electricity company (n=717)

Q24a Which of the following would be the one most effective incentive to encourage you to change electricity companies or change the way you buy electricity?

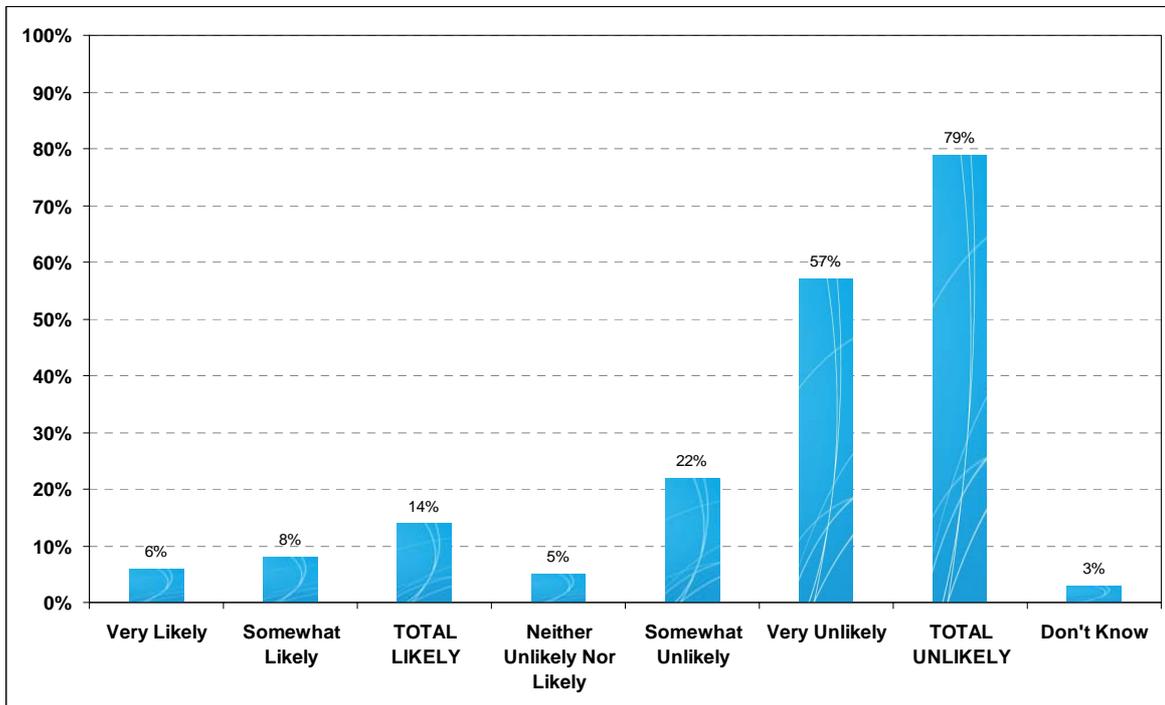
Figure 27: Availability of Offers Compared to 12 Months Ago



Base: Total Sample (n=1002)

Q40. Would you say there is a greater/lesser/unchanged number of offers now available?

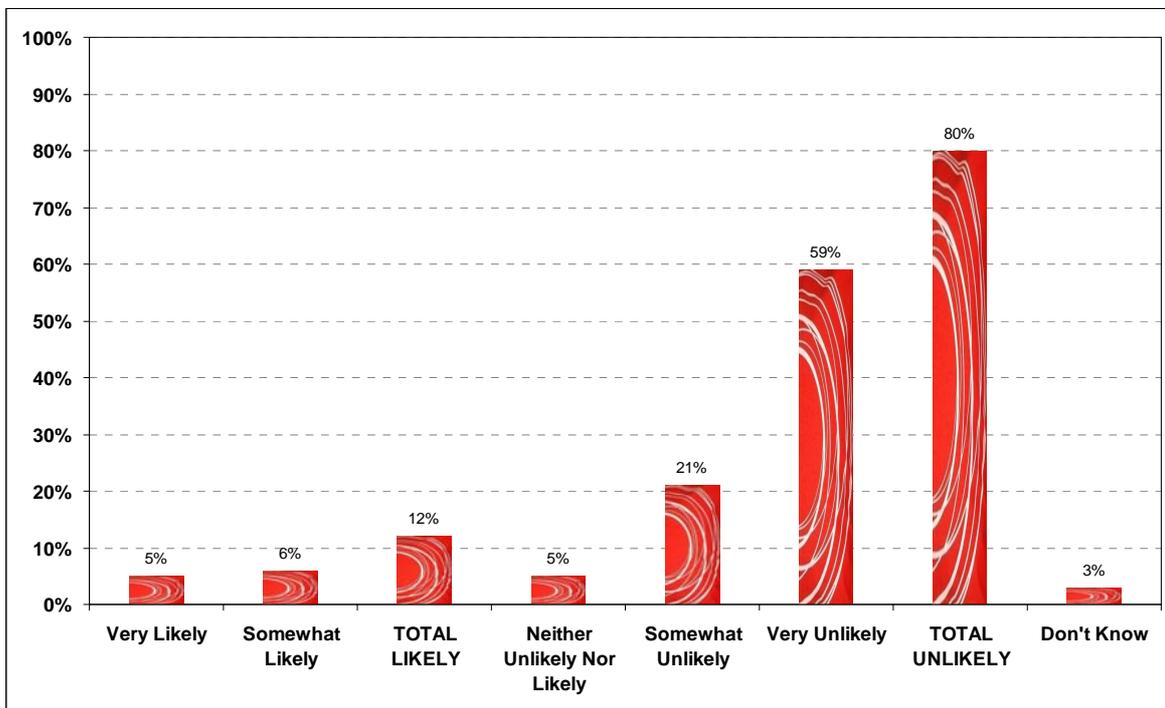
Figure 28: Likelihood of Changing Supply Arrangements in Next 12 Months



Base: Total Sample (n=1002)

Q25. In the next 12 months, how likely or unlikely is it that you will change your supply arrangements with your current electricity company?

Figure 29: Likelihood of Changing Electricity Companies in Next 12 Months



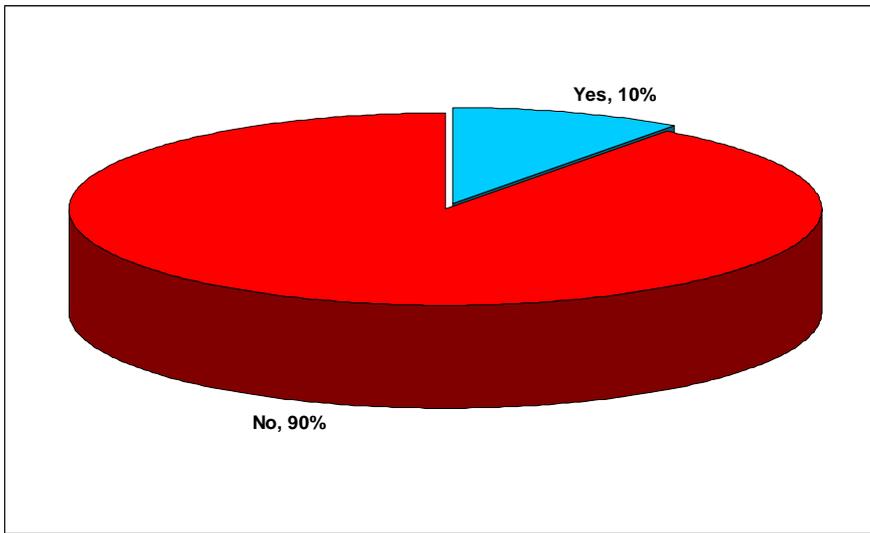
Base: Total Sample (n=1002)

Q25a. In the next 12 months, how likely or unlikely is it that you will switch to another electricity company?

Switching is one index of the customer’s interest in exploring other options in the market place. Another, which may require somewhat less effort, is the investigation of the options available. Figure 30 shows that this is not a very common behaviour either. Only 10% of the sample indicated they had looked for any information in the last 12 months concerning changing companies or supply arrangements.

For those who had investigated options (Figure 31), the internet was the most popular information source (56%) followed by the electricity company (20%). Table 5 shows that the information was easy to obtain (69%) and understand (70%) but information was less satisfactory for ease of comparing offers (28%). The first two figures but not the third are somewhat improved relative to those in Figure 7 which reflects information provided by electricity companies when they contact customers.

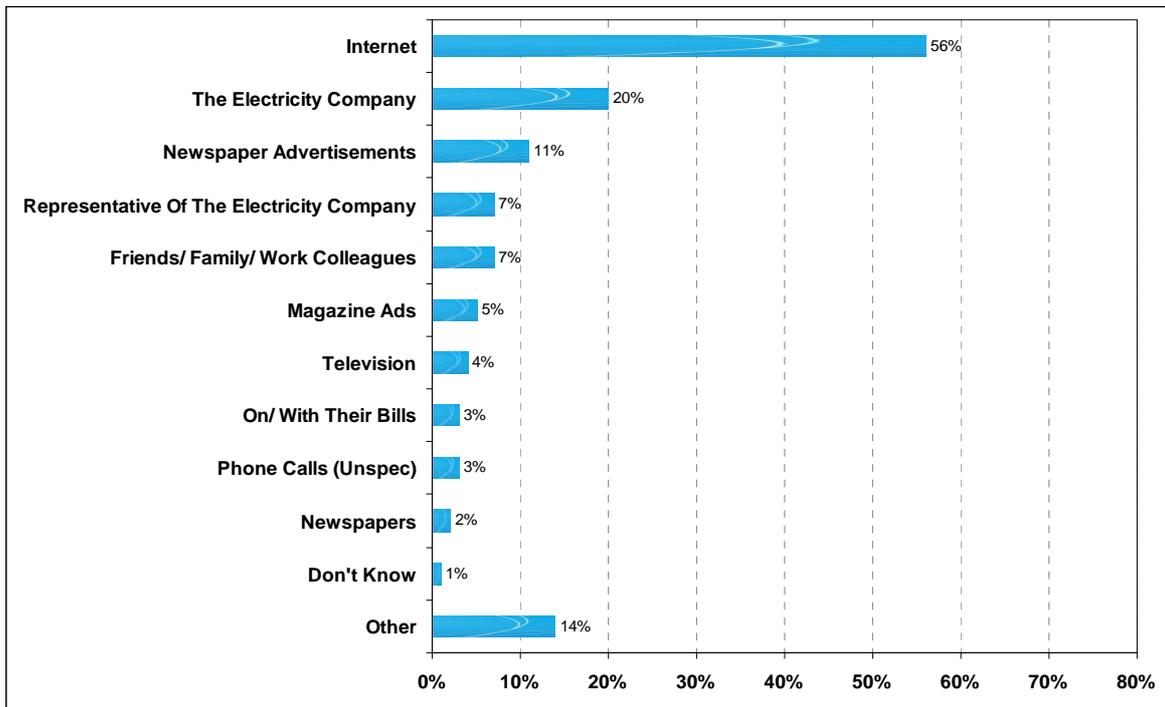
Figure 30: Looked for Information in Last 12 Months



Base: Total Sample (n=1002)

Q26. Have you looked for any information in the last 12 months to assist in making decision about switching arrangements with an electricity supplier whether you have taken out a contract or not?

Figure 31: Sources of Information Used in Search



Base: Those who looked for information on switching (n=98)

Q27. What were the sources of information?

Table 5: Ratings of Information Obtained

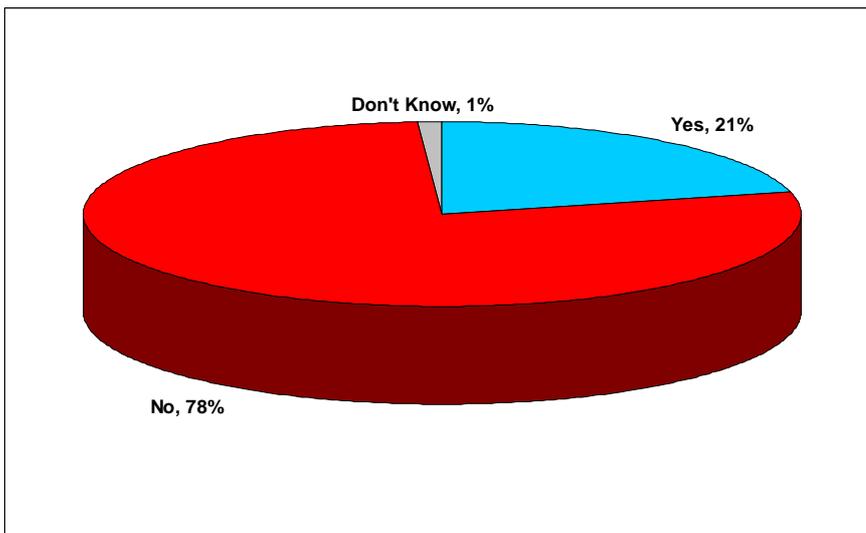
	Agree Strongly	Agree Somewhat	TOTAL AGREE	Neither Agree Nor Disagree	Disagree Somewhat	Disagree Strongly	TOTAL DISAGREE	Don't Know/ Not Sure/ Can't Say
INFORMATION EASY TO OBTAIN	34%	36%	69%	17%	7%	4%	11%	3%
INFORMATION EASY TO UNDERSTAND	35%	35%	70%	9%	14%	4%	18%	3%
INFORMATION MADE IT EASY TO COMPARE OFFERS	14%	13%	28%	24%	23%	17%	39%	9%
SUFFICIENT INFORMATION TO MAKE INFORMED CHOICE	24%	31%	54%	20%	11%	11%	22%	4%

Base: Those who looked for information on switching (n=98)

Q27a-d Thinking about the information you obtained, please rate your level of agreement

Though respondents cite price as a driver to change or look into changing suppliers/plans, the price of energy does not appear to be currently at levels that hurt most household budgets. Figure 32 shows that only one household in five (21%) agrees that energy bills are affecting the ability to meet other household expenditures. Note this question does not specifically name electricity but rather covers energy expenses more generally.

Figure 32: Influence of Amount of Energy Spend on Other Household Expenditures



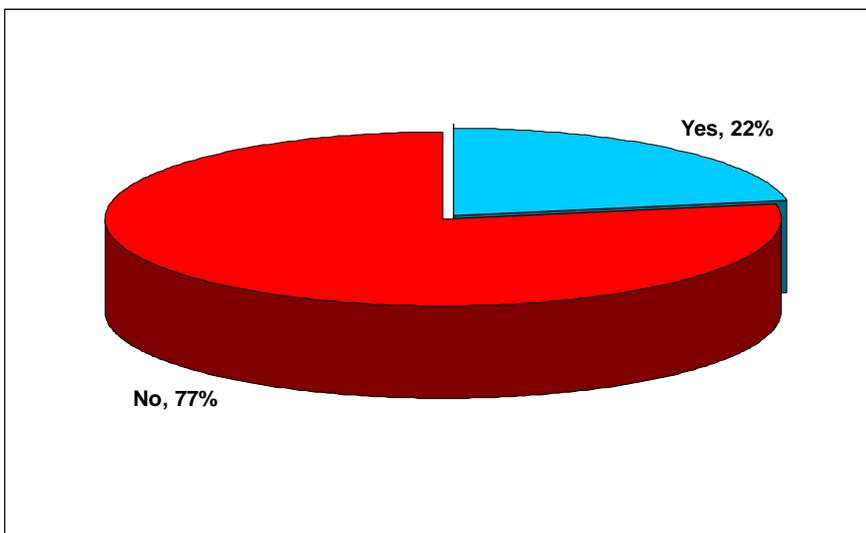
Base: Total sample (n=1002)

Q31. Does the amount of money you spend on your energy bills affect your ability to meet other household expenditures?

5.5 Customer Satisfaction

Given the satisfaction with the current supplier used by most respondents, it is not surprising that actions were rare and problems were rarely experienced. Figure 33 shows that nearly 80% (78%) had not contacted their electricity company in the past year. Those who did, see Table 6, were satisfied with the timeliness of the response and the assistance provided (~70% very or somewhat satisfied).

Figure 33: Contacted Electricity Company in Past 12 Months



Base: Total Sample (n=1002); Totals do not equal 100% due to rounding and omission of “don’t know.”

Q43. Have you contacted your electricity company in the past 12 months?

Table 6: Satisfaction with Contact with Electricity Company in Past 12 Months

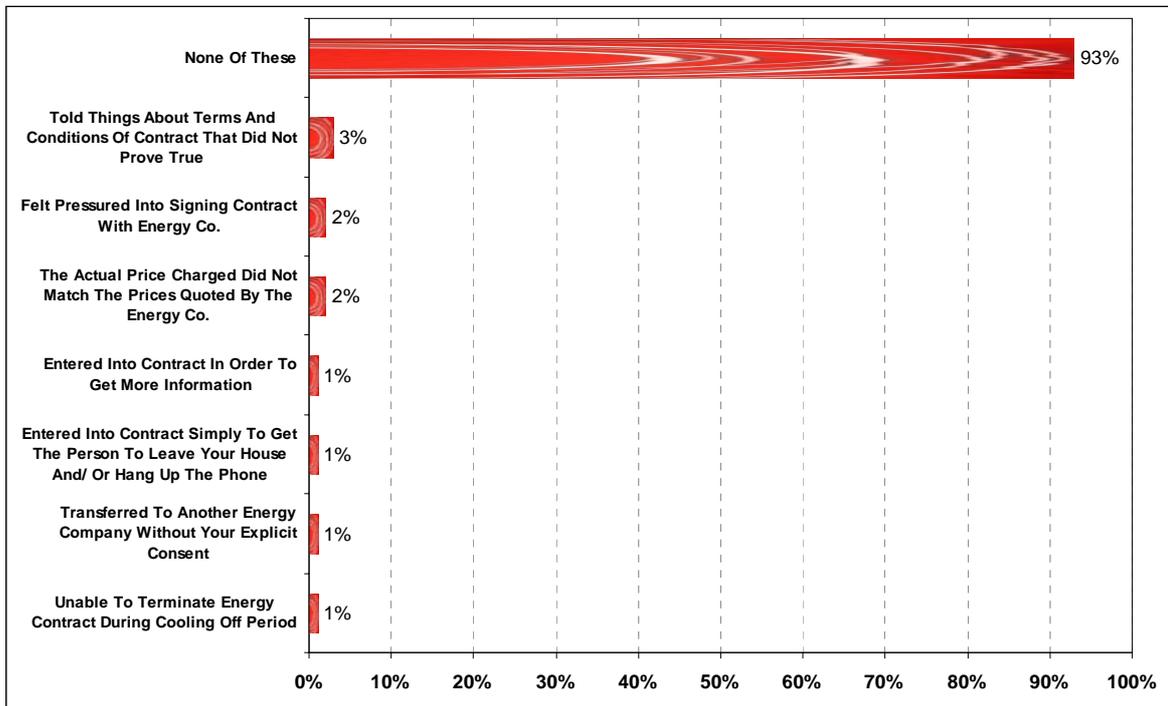
	Very Satisfied	Somewhat Satisfied	TOTAL SATISFIED	Neither	Somewhat Dissatisfied	Very Dissatisfied	TOTAL DISSATISFIED	Don't Know/ Not Sure/ Can't Say
SATISFIED WITH TIMELINESS OF RESPONSE	45%	36%	81%	9%	6%	4%	10%	0%
SATISFIED WITH ASSISTANCE PROVIDED	44%	36%	79%	9%	6%	4%	10%	1%

Base: Contacted electricity company in past 12 months (n=228)

Q44a-b When you contacted your electricity company in the past 12 months, how satisfied were you with...

More than 90% of respondents (93%) had not encountered any of seven problems such as prices promised not matching what was charged or being pressured to sign a contract (Figure 34). A similar high proportion of the sample (94%) had never lodged a complaint about their electricity company (Figure 35). Nearly everyone who had complained, contacted the electricity company itself rather than any independent organization or office (Figure 36).

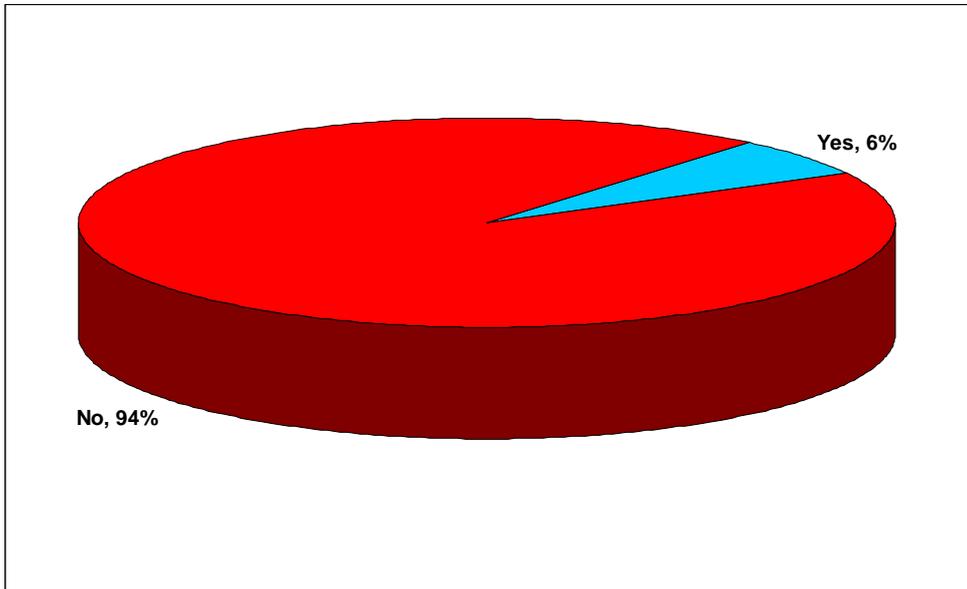
Figure 34: Experienced any of the Following



Base: Total Sample (n=1002)

Q35. Have you experienced any of the following?

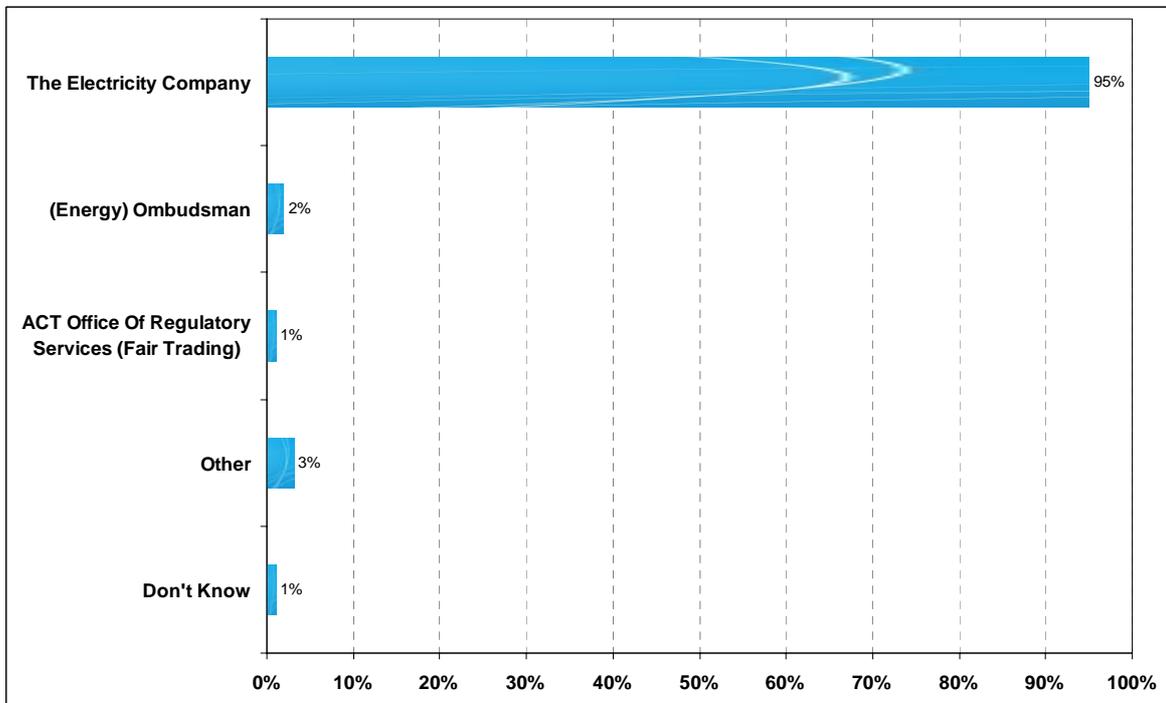
Figure 35: Ever Complain About Electricity Company?



Base: Total Sample (n=1002)

Q36. Have you ever made a complaint about your electricity company?

Figure 36: Who Did You Complain To?

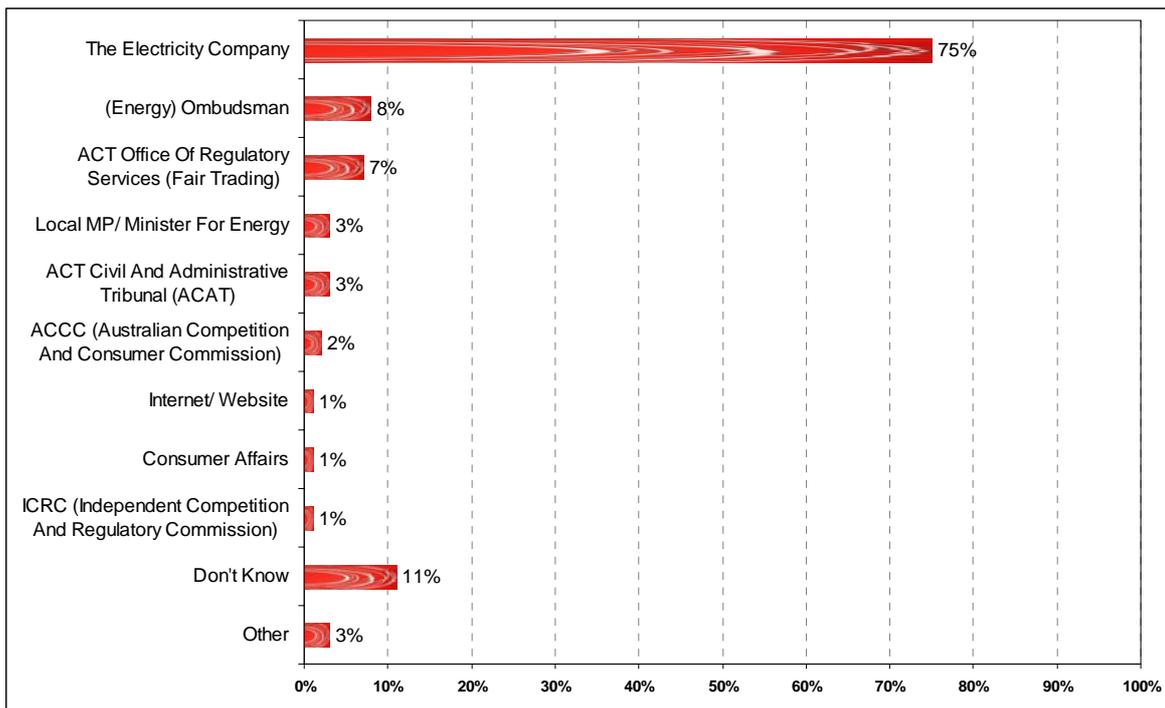


Base: People complaining (n=61)

Q37. Who did you complain to?

Those who have not complained were posed the hypothetical question of who they would complain to if the situation arose. Three people in four (75%) cited the electricity company. Independent organisations such as the ombudsman or regulatory agencies (Fair Trading) were mentioned by fewer than 10% (Figure 37). Awareness of the availability of independent sources of assistance was correspondingly low (9%), see Figure 38.

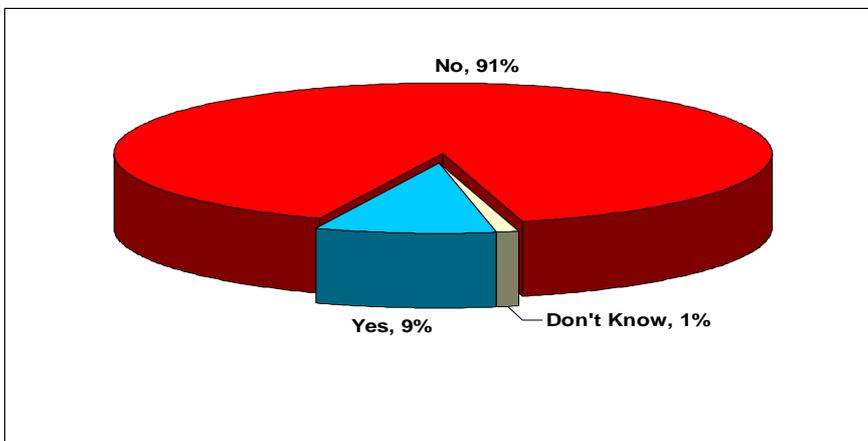
Figure 37: Who Would You Complain To?



Base: People who have not complained (n=941)

Q38. If you ever did need to complain about your electricity company, who would you go to?

Figure 38: Awareness of Availability of Independent Assistance



Base: Total Sample (n=1002); Totals do not equal 100% due to rounding.

Q42. Are you aware of the availability of independent assistance to help make decision regarding electricity?

Considering the level of satisfaction with the current supplier and their selection as the first option for contact when an issue arises, Figure 39 shows they did not receive high levels of support as the place to go for information on feed in tariffs (54%), energy efficiency (52%) or new energy efficient appliances (35%).

Table 7: Would Go to Electricity Company for...

	Agree Strongly	Agree Somewhat	TOTAL AGREE	Neither /Nor	Disagree Somewhat	Disagree Strongly	TOTAL DISAGREE	Don't Know/ Not Sure/ Can't Say
PURCHASING A NEW ENERGY APPLIANCE	16%	20%	35%	15%	22%	24%	46%	3%
IMPROVING MY ENERGY EFFICIENCY AND DECREASING MY ENERGY USE	19%	33%	52%	14%	18%	13%	32%	2%
FEED-IN TARIFFS	25%	30%	54%	11%	12%	14%	26%	8%

Base: Total Sample (n=1002)

Q45a-c Think about the information given to you by an electricity company, please rate your level of agreement with the following...

6. CONCLUSION

At the beginning of this report, a question was posed for the study to address: To what extent do the actions and attitudes of domestic users of electricity reflect a competitive retail environment?

Several criteria were listed that would be used to determine whether competition was present. Each of these is considered here in light of the residential survey of 1002 people in the ACT.

- **Independent rivalry within the market** – A majority of people surveyed were aware that they could choose among electricity suppliers. However 40% were still not aware of this seven years after choice was introduced.
- **Ability of suppliers to enter the market** – No survey question specifically asked people whether competitors could or could not enter the ACT marketplace. However, a majority of people could not name another supplier than the one they use and more than 90% use ActewAGL.
- **The exercise of market choice by customers** – Most people report no company approached them to sell electricity and even fewer were motivated to approach suppliers. The lack of engagement may owe to the general satisfaction experienced with the current provider ActewAGL. People who did switch suppliers or supply arrangements were able to judge the process and were pleased with most elements of it (ease, speed of changing, etc.)
- **Differentiated products and services** – Those who switched suppliers were most often motivated by the offer of better rates on the service. Others reasons were mentioned (e.g., bundling and green energy) but at a fairly low rate (under 10% for each). Those who switched supply arrangements cited green energy as the motivator.
- **Price and profit margins** – No survey question directed addressed whether there was a perception that electricity companies are making too much profit or too little. The cost of energy services as reflected in bills was not judged to be placing a burden on the payment of other household expenditures. Nevertheless, lower prices were mentioned most often as the incentive for any future change.
- **Customer switching** – Switching of any type was a rare occurrence and few expect to switch in the next 12 months. The level of interest does not appear to be very high currently.

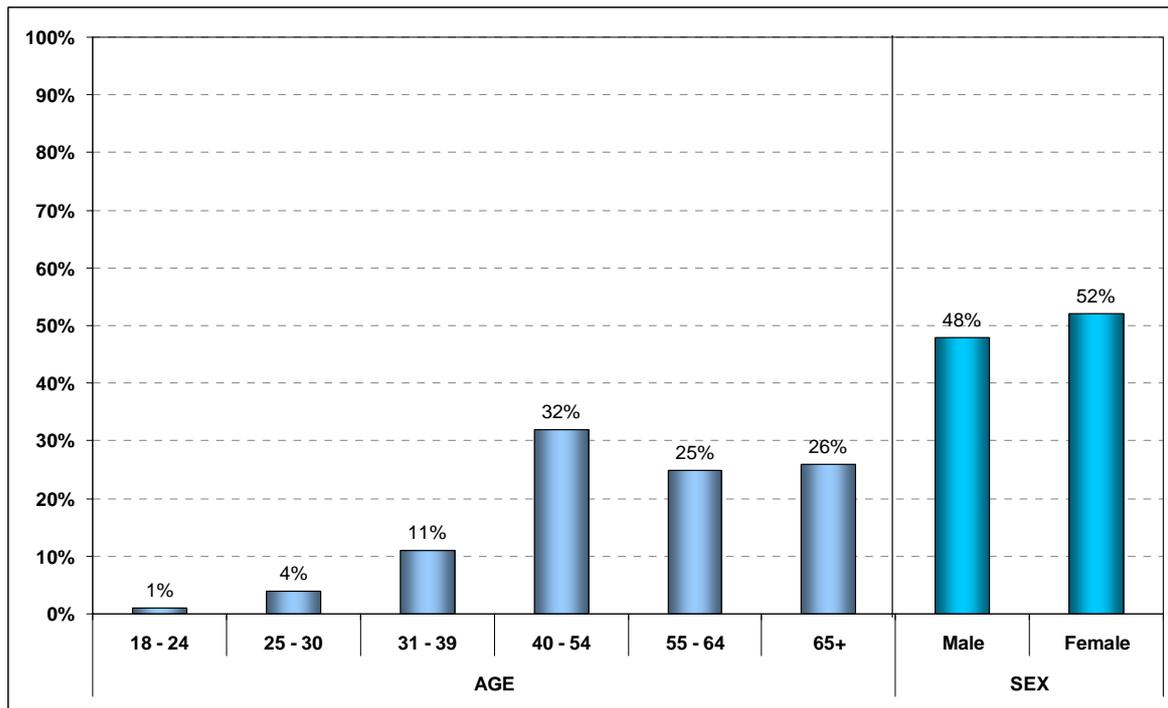
On balance, it does not appear that a vigorous competitive marketplace for electricity exists in the ACT at present. The satisfaction with ActewAGL and the low involvement in the category may be large contributing factors to this state of affairs.

7. DEMOGRAPHICS

7.1 General Demographics of Sample

The sample was well balanced for males and females and had approximately as many people below age 54 as above (Figure 39).

Figure 39: Age and Sex Composition of Sample



About two-thirds of the sample had at least some post-high school education (Table 8).

Table 8: Education Level Achieved by Sample

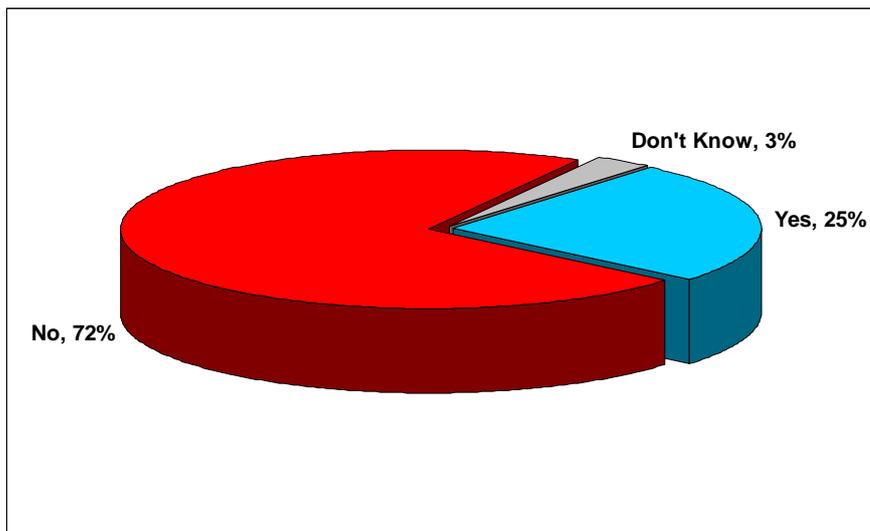
HIGHEST LEVEL OF EDUCATION	% of Total Respondents n=1002
Primary School	2%
High School	29%
Tertiary	43%
Postgraduate	24%
Other	0%
Refused	1%
HOUSEHOLD SITUATION	% of Total Respondents n=1002
Single, Live On My Own	23%
Single, Live In A Shared Household	4%
Live With Partner/ Spouse Without Dependent Children	32%
Single Adult, With Dependent Child Or Children	6%
Two Adults With Dependent Child Or Children	29%
Two Or More Adults With Dependent Child Or Children	5%
Refused	2%
NUMBER OF PEOPLE IN HOUSEHOLD	% of Total Respondents n=1002
One	23%
Two	32%
Three	17%
Four	17%
Five	7%
Six	2%
Seven	1%
Eight	0%
Nine	0%
Ten	-
More Than Ten	-
Don't Know/ Not Sure/ Can't Say	0%
Refused	1%

HOUSEHOLD OWNERSHIP	% of Total Respondents n=1002
Own Your Home/ Pay A Mortgage	84%
Pay Rent	14%
Other	1%
Don't Know/ Not Sure/ Can't Say	1%
GROSS ANNUAL HOUSEHOLD INCOME	% of Total Respondents n=1002
Under \$15,000	5%
\$15,001 - 25,000	6%
\$25,001 - 35,000	5%
\$35,001 - 50,000	8%
\$50,001 - 75,000	14%
\$75,001 - 100,000	14%
More Than \$100,000	36%
Don't Know/ Not Sure/ Can't Say	3%
Refused	9%

7.2 Energy-related Demographics

People who hold a current pensioner concession card or Department of Veterans Affairs gold card are in some cases eligible for an electricity rebate. The rebate (energy concession) was received by one quarter of the sample in ACT (Figure 40).

Figure 40: Whether Receive Energy Concessions



Base: Total Sample (n=1002)

2. Do you currently receive an energy concession on your electricity bill?

Home electricity service was a requirement of the study. Piped natural gas was present in over 70% of the households as well. Solar at 7% has yet to make significant inroads (Table 9).

Table 9: Energy Used

TYPES OF ENERGY USED IN HOUSEHOLD	
Electricity	100%
Piped Natural Gas	71%
Bottled Gas	5%
Solar	7%
Other	1%

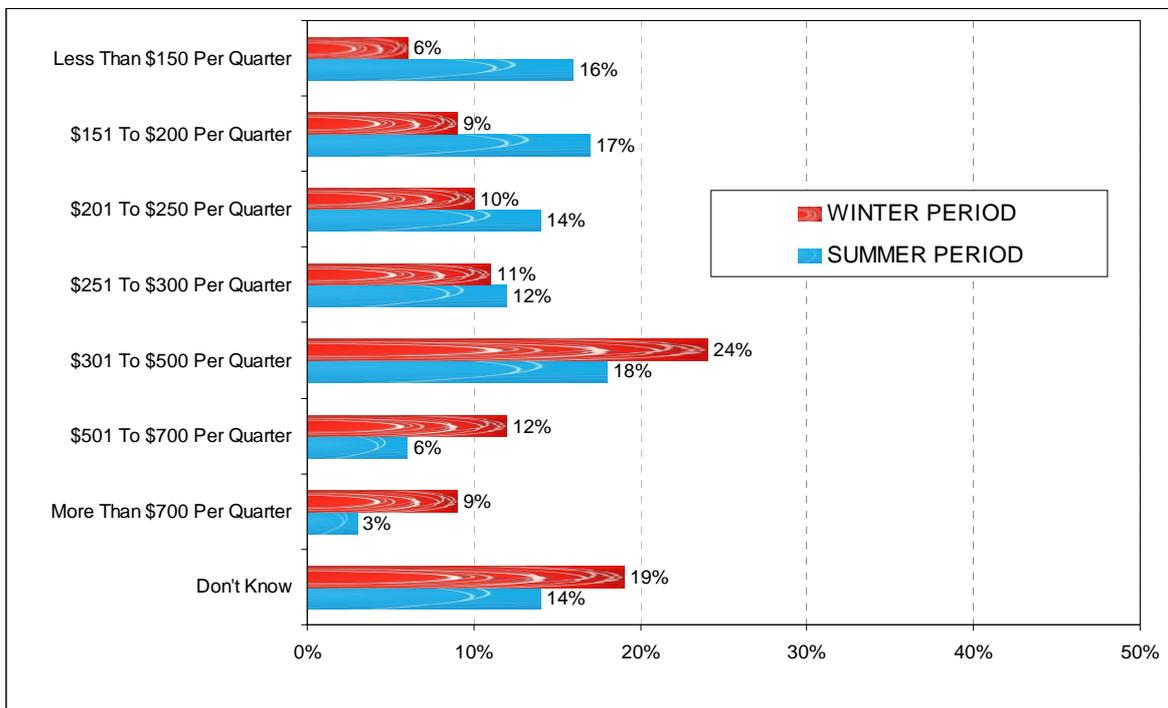
Base: Total Sample (n=1002)

QS2. For this residence, what type of energy does your household use?

Participants were asked to estimate their electricity bills for the summer and winter periods. This was defined as the three month or quarterly amount spent during that season. Dates for the period were not specified as not all billing cycles are the same.

Figure 41 showed that the \$301-\$500 range (\$100-\$167 per month) was most common for both periods. Nearly 1 person in 5 did not provide an estimate of their winter electricity bill and 14% did not provide an estimate for the summer.

Figure 41: Amount Spent On Electricity

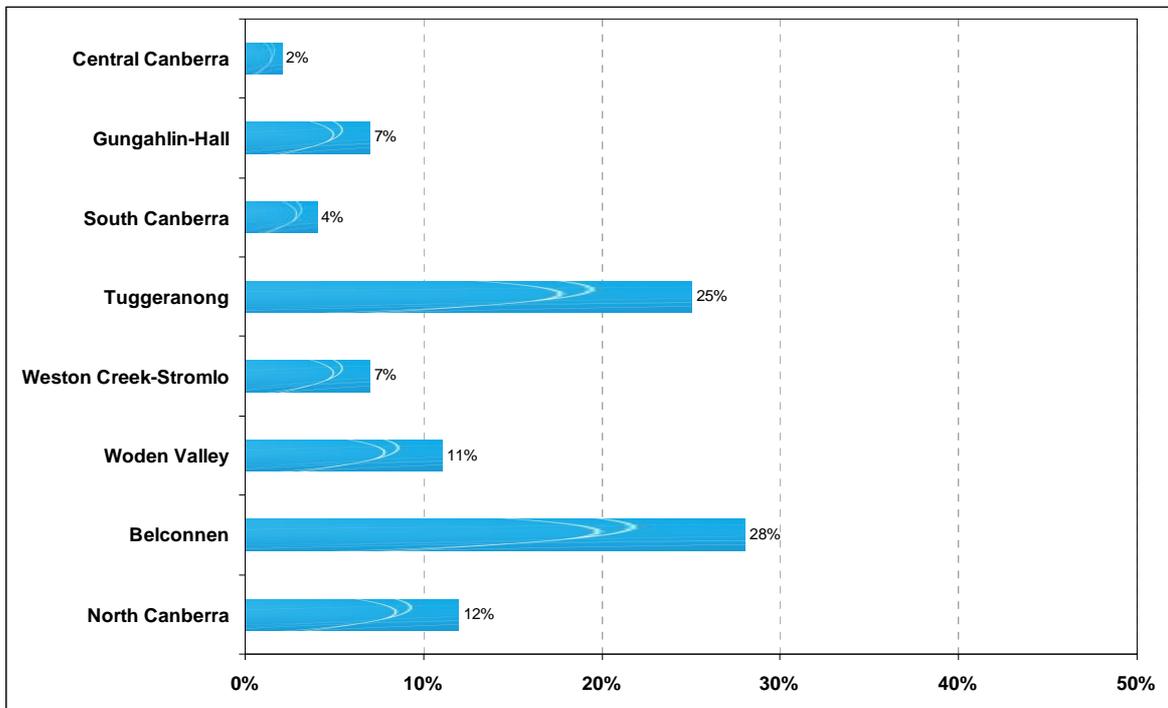


Base: Total Sample (n=1002)

Q2/Q3 How much was your most recent electricity bill for the SUMMER/WINTER period?

7.3 ACT Regions Represented

Figure 42: Regions of ACT that Sample Lived In



7.4 Survey Contact Results:

Table 10 below shows that the resident survey had an overall response rate of 11%.

Table 10: Resident Survey Response Rate

Sample Used	8829
Interviews achieved	1002
Response Rate	11%

APPENDICES

7.5 Recruitment Screener and Survey

Good [Morning/ Afternoon/ Evening]. My name is (SAY NAME) from Roy Morgan Research. May I please speak with a person in the household who is the decision maker or shares in the decision making about the purchase of electricity? We're not selling anything. We are conducting a survey about the electricity market in the ACT.

If not available, "When would be a good time to reach him/her?"

IF NECESSARY, MAKE AN APPOINTMENT.

IF RESPONDENT ASKS WHERE DID YOU GET MY NUMBER, SAY: "The published telephone listings for your area."

IF RESPONDENT ASKS WHO THE STUDY IS BEING DONE FOR, SAY "We're doing the study on behalf of the Australian Energy Market Commission."

NOTE TO INTERVIEWERS: IT IS IMPORTANT THAT ALL PARTICIPANTS HAVE A GOOD COMMAND OF SPOKEN ENGLISH. IF YOU FEEL A RESPONDENT IS STRUGGLING TO UNDERSTAND THE QUESTIONS IN THIS SCREENER, PLEASE TERMINATE THE INTERVIEW AFTER ANY QUESTION.

IF RESPONDENT HAS CONCERNS ABOUT PRIVACY/CONFIDENTIALITY ISSUES, SAY: The information will be used for research purposes only. Your answers will be combined with 100's of other people in the ACT. Your anonymity is assured. If you are concerned about privacy issues or Roy Morgan Research's compliance with the Privacy Act, you can access our privacy policy on our website www.roymorgan.com

IF NECESSARY: You can go to the website www.privacy.gov.au for further information.

CODES IN QS1 WILL BE RANDOMISED

[Single] {Random}

QS1. Are you, or is anyone in your immediate household, employed by any of the following companies?

READ OUT

- 1 ActewAGL Retail
- 2 Country Energy
- 3 Energy Australia
- 4 Integral Energy
- 5 Origin Energy
- 6 TRUenergy
- 7 Fixed (DO NOT READ) NONE OF THE ABOVE

IF EMPLOYED BY ACTEWAGL RETAIL (CODE 1 ON QS1) SAY

Thanks very much for your time. You do not qualify for this study.

ENDIF

CODES IN QS2 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

QS2. For this residence, what types of energy does your household use?

READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 Electricity
- 2 Piped Natural Gas
- 3 Bottled Gas
- 4 Solar
- 97 Fixed Other (Please Specify)
Openend
- 98 Fixed (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
Single
- 99 Fixed (DO NOT READ OUT) REFUSED
Single

IF CODE 1 NOT SELECTED OR SELECTED CODE 97 OR CODE 98 OR 99 ONLY ON QS2 SAY

Thanks but we need to speak with people who use certain types of energy

ENDIF

[Single]

Q2. How much was your most recent electricity bill for the SUMMER period? Your best estimation of the cost is fine.

READ OUT

- 1 Less than \$150 per quarter (less than \$50 per month)
- 2 \$151 to \$200 per quarter (\$50- \$67/ month)
- 3 \$201 to \$250 per quarter (\$67- \$84/ month)
- 4 \$251 to \$300 per quarter (\$84- \$100/ month)
- 5 \$301 to \$500 per quarter (\$100- \$167/ month)
- 6 \$501 to \$700 per quarter (\$167- \$234/ month)
- 7 More than \$700 per quarter (more than \$234 per month)
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
- 99 (DO NOT READ OUT) REFUSED

[Single]

Q3. How much was your most recent electricity bill for the WINTER period? Your best estimation of the cost is fine.

READ OUT

- 1 Less than \$150 per quarter (less than \$50 per month)
- 2 \$151 to \$200 per quarter (\$50- \$67/ month)
- 3 \$201 to \$250 per quarter (\$67- \$84/ month)
- 4 \$251 to \$300 per quarter (\$84- \$100/ month)
- 5 \$301 to \$500 per quarter (\$100- \$167/ month)
- 6 \$501 to \$700 per quarter (\$167- \$234/ month)
- 7 More than \$700 per quarter (more than \$234 per month)
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
- 99 (DO NOT READ OUT) REFUSED

CODES IN Q4 WILL BE ROTATED

[Single] {Rotate}

Q4. As far as you are aware, which of the following statements applies to you?

READ OUT

INTERVIEWER NOTE: SOME PEOPLE MAY REFER TO THEIR "ELECTRICITY RETAILER." WE ARE TALKING HERE SIMPLY ABOUT WHO THEY BUY THEIR ELECTRICITY FROM.

- 1 I can now choose the company I purchase electricity from
- 2 I am obliged to purchase electricity from my current electricity company
- 98 Fixed (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q5. Which company do you buy electricity from for your current dwelling in ACT?

(INTERVIEWERS NOTE - IF THE RESPONDENT IS CONFUSED AS TO WHO THEIR CURRENT COMPANY IS, THEY SHOULD SELECT THE ONE THEY HAVE MOVED, OR ARE MOVING TO)

DO NOT READ OUT

- 1 ACTEWAGL
- 2 COUNTRY ENERGY
- 3 ENERGY AUSTRALIA
- 4 INTEGRAL ENERGY
- 5 ORIGIN ENERGY
- 6 TRUENERGY
- 97 Fixed
Openend OTHER (PLEASE SPECIFY)
- 98 Fixed DON'T KNOW/NOT SURE/CAN'T SAY

[Multiple] {Spread:20 }

Q6. Which companies do you think you could buy electricity from for your current dwelling in ACT? Any others?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- | | | |
|----|------------------|-------------------------------|
| 1 | | ACTEWAGL |
| 2 | | COUNTRY ENERGY |
| 3 | | ENERGY AUSTRALIA |
| 4 | | INTEGRAL ENERGY |
| 5 | | ORIGIN ENERGY |
| 6 | | TRUENERGY |
| 97 | Fixed
Openend | OTHER (PLEASE SPECIFY) |
| 98 | Fixed
Single | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q7. Have ANY electricity companies approached your household by any means and offered to sell you electricity?

DO NOT READ OUT

- | | | |
|----|--|-------------------------------|
| 1 | | YES |
| 2 | | NO |
| 98 | | DON'T KNOW/NOT SURE/CAN'T SAY |

IF CODE 1 ON Q7 ASK

[Quantity] {Min: 0, Max: 50}

Q7a. How many times have you or others in your household been approached in the past 12 months?

CODES IN Q8 WILL BE RANDOMISED

[Multiple] {Spread:25 }

Q8. Thinking about the last electricity company who contacted you, how did they approach you?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

1 DOOR TO DOOR SALES CONSULTANT

2 TELEPHONE SALES CONSULTANT

3 DIRECT MAIL

97 Fixed
Openend OTHER (PLEASE SPECIFY)

98 Fixed
Single DON'T KNOW/NOT SURE/CAN'T SAY

Think about the information given to you by an electricity company , on a scale of #/1 to 5 where 1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 to 1 where 5 is "disagree strongly", 4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/, please rate your level of agreement with the following :

[Single]

Q8A1. The information was easy to obtain

- 1 1 - AGREE STRONGLY
- 2 2 - AGREE SOMEWHAT
- 3 3 - NEITHER AGREE NOR DISAGREE
- 4 4 - DISAGREE SOMEWHAT
- 5 5 - DISAGREE STRONGLY
- 6 DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q8A2. The information was easy to understand

- 1 1 - AGREE STRONGLY
- 2 2 - AGREE SOMEWHAT
- 3 3 - NEITHER AGREE NOR DISAGREE
- 4 4 - DISAGREE SOMEWHAT
- 5 5 - DISAGREE STRONGLY
- 6 DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q8A3. The information made it easy to compare offers

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q8A4. There was sufficient information for me to make an informed choice

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

ENDIF

[Single]

Q9. Have you approached any electricity company or companies, including your existing electricity company, to ask about buying electricity from them?

DO NOT READ OUT

- 1 YES
- 2 NO
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

IF YES IN Q9 (CODE 1 IN Q9):

CODES IN Q10 WILL BE ROTATED

[Multiple] {Spread:20 Rotate}

Q10. Did you approach the electric company or companies because

READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 You are planning to move house?
- 2 You were interested in comparing rates/offers
- 97 Fixed
Openend (DO NOT READ OUT) OTHER (PLEASE SPECIFY)
- 98 Fixed
Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Multiple] {Spread:20 }

Q11. Thinking about the last electricity company that you approached, how did you do this?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 TELEPHONE
- 2 VISITED A RETAIL OUTLET
- 3 INTERNET/SENT AN EMAIL
- 97 Fixed Openend OTHER (PLEASE SPECIFY)
- 98 Fixed Single DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 IN Q7 OR Q9 ASK:

CODES IN Q12 WILL BE ROTATED

[Single] {Rotate}

Q12. Did any of the electricity companies that you approached or that approached you....

READ OUT

- 1 Refuse to sell you electricity
- 2 Offer to sell you electricity
- 98 Fixed Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN Q12 ASK:

[Multiple] {Spread:20 }

Q12a. Why did the company refuse to sell you electricity?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (PLEASE SPECIFY)

98 Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

[Single]

Q13. Have you switched electricity companies in the ACT since July 2003?

DO NOT READ OUT

1 YES

2 NO

98 DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN Q13 ASK:

[Single]

Q14. How many times have you switched electricity companies in the ACT since July 2003?

DO NOT READ OUT

- | | |
|----|-------------------------------|
| 1 | ONE |
| 2 | TWO |
| 3 | THREE |
| 4 | FOUR |
| 5 | FIVE |
| 6 | MORE THAN FIVE TIMES |
| 98 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q15. The last time you switched your electricity company, how easy was the switching process? Was it #/Very easy, Somewhat easy, Neither easy nor difficult, Somewhat difficult, Very difficult/Very difficult, Somewhat difficult, Neither easy nor difficult, Somewhat easy, Very easy/

- | | |
|----------|---|
| 1 | VERY EASY |
| 2 | SOMEWHAT EASY |
| 3 | NEITHER EASY NOR DIFFICULT |
| 4 | SOMEWHAT DIFFICULT |
| 5 | VERY DIFFICULT |
| 98 Fixed | (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY |

[Single] {Rotate}

Q15a Would you say the switching process....?

READ OUT

- 1 took more time than expected
- 2 took less time than expected
- 3 took about as long as expected
- 98 Fixed (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q15b. How would you rate the explanation you received about the switching process?
Was it #/Excellent, Very good, Good, Fair, Poor/Poor, Fair, Good, Very good,
Excellent/

- 1 EXCELLENT
- 2 VERY GOOD
- 3 GOOD
- 4 FAIR
- 5 POOR
- 98 Fixed (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q15c. Did the switching process go smoothly, as expected?

DO NOT READ OUT

1 YES

2 NO

98 DON'T KNOW/NOT SURE/CAN'T SAY

IF NO IN Q15c (CODE 2 IN Q15c)ASK:

[Single]

Q15c1. Why did the switching process not go smoothly?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (PLEASE SPECIFY)

98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T
SAY

ENDIF

[Single]

Q16. The last time you switched your electricity company, what was the one most important reason for your decision?

DO NOT READ OUT

- 1 I WAS OFFERED A MONETARY REBATE / MONETARY CREDIT/
FINANCIAL INCENTIVE TO SWITCH INCENTIVE
- 2 I WANTED TO BE WITH THE SAME COMPANY FOR
ELECTRICITY AND GAS
- 3 I WANTED TO TAKE ADVANTAGE OF SERVICE BUNDLING
(FOR EXAMPLE, GETTING ELECTRICITY AND TV SERVICES
FROM THE SAME COMPANY)
- 4 I WAS UNHAPPY WITH MY FORMER ELECTRICITY COMPANY
- 5 I WANTED TO GET THE SALESPERSON TO LEAVE ME ALONE
- 6 I WAS OFFERED GREEN ENERGY PRODUCT
- 7 I WAS OFFERED A BETTER RATE ON THE ELECTRICITY/ A
BETTER PLAN / CAN NOW PAY LESS FOR ELECTRICITY
- 8 I WAS OFFERED A FREE GIFT (OR PRIZE OR SUBSCRIPTION)
- 9 I TRUSTED THEM MORE
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q17. The last time you switched your electricity company, did you do this because...?

READ OUT

- 1 you moved to another home, or
- 2 because of another reason unrelated to moving home
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q18. Overall, how satisfied or dissatisfied are you with your new electricity company?
Are you #/Very satisfied, Somewhat satisfied, Neither satisfied nor dissatisfied,
Somewhat dissatisfied, Very dissatisfied/Very dissatisfied, Somewhat dissatisfied,
Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT DISSATISFIED
- 5 VERY DISSATISFIED
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 4 OR 5 IN Q18 ASK

[Single]

Q18a. Why are you dissatisfied with your new electricity company?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 97 Openend OTHER (PLEASE SPECIFY)
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T
 SAY

ENDIF

IF CODE 1 OR 2 IN Q18 ASK

[Single]

Q18b. Why are you satisfied with your new electricity company?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (PLEASE SPECIFY)

98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T
SAY

ENDIF

ENDIF

ASKALL

[Single]

Q19. Have you, at any stage, entered into a contract and used the cooling off period to cancel the contract?

DO NOT READ OUT

1 YES

2 NO

3 NOT HEARD OF A COOLING OFF PERIOD

98 DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 2 or 98 IN Q13 ASK:

[Multiple] {Spread:20 }

Q20. We asked you earlier if you switched electricity companies in the ACT since July 2003. Why haven't you changed your electricity company?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 CONCERN WITH THE SWITCHING PROCESS
- 2 COULD NOT BE BOTHERED / TOO MUCH EFFORT
- 3 THE INFORMATION IS TOO COMPLEX/THERE'S TOO MUCH TO SORT THROUGH/ TOO MUCH TO FIGURE OUT/TOO TECHNICAL
- 4 HAPPY WITH CURRENT ELECTRICITY COMPANY
- 5 HIGHER COSTS WITH OTHER ELECTRICITY COMPANIES
- 6 INADEQUATE POTENTIAL SAVINGS
- 7 INSUFFICIENT INFORMATION / NOT ENOUGH INFORMATION
- 8 COULDN'T UNDERSTAND THE INFORMATION/ INFORMATION IS VAGUE/ AMBIGUOUS/ POORLY WRITTEN/POORLY ORGANISED
- 9 LACK OF CONFIDENCE IN THE NEW ELECTRICITY COMPANY
- 10 WAITING FOR BETTER OFFER WAITING FOR MORE CONVINCING OFFER
- 11 DIDN'T KNOW I COULD SWITCH
- 12 NOT SURE I'VE CHANGED ELECTRICITY COMPANIES/SUPPLIERS
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 Single DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q21. Have you changed anything about the way your electricity company sells electricity to you?

INTERVIEWER NOTE: IF NECESSARY SAY: THAT IS, HAVE YOU AGREED TO PAY DIFFERENT RATES, BUY A DIFFERENT TYPE OF ELECTRICITY, BEEN GIVEN A GIFT OR INCENTIVE TO AGREE TO A DIFFERENT TYPE OF SUPPLY ARRANGEMENT/ CONTRACT.

DO NOT READ OUT

- | | |
|----|-------------------------------|
| 1 | YES |
| 2 | NO |
| 98 | DON'T KNOW/NOT SURE/CAN'T SAY |

IF CODE 1 IN Q21

[Single]

Q22. Thinking about the last time you changed your electricity supply arrangements with your electricity company, what was the ONE main reason for your decision?

DO NOT READ OUT

- 1 I WAS OFFERED A MONETARY INCENTIVE
- 2 I WANTED TO BE WITH THE SAME COMPANY FOR ELECTRICITY AND GAS
- 3 I WANTED TO TAKE ADVANTAGE OF SERVICE BUNDLING (FOR EXAMPLE, GETTING ELECTRICITY AND TV SERVICES FROM THE SAME COMPANY)
- 4 I WAS UNHAPPY WITH MY FORMER ELECTRICITY COMPANY
- 5 I WANTED TO GET THE SALESPERSON TO LEAVE ME ALONE
- 6 I WAS OFFERED GREEN ENERGY PRODUCT
- 7 I WAS OFFERED A BETTER RATE ON THE ELECTRICITY/ A BETTER PLAN
- 8 I WAS OFFERED A FREE GIFT (OR PRIZE OR SUBSCRIPTION)
- 9 I TRUSTED THEM MORE
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q22a. Thinking about the last time you changed your electricity supply arrangements with your electricity company, was this because...?

READ OUT

- 1 you moved to another home, or
- 2 because of another reason unrelated to moving home
- 98 Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q23. How satisfied or dissatisfied are you with your new electricity supply arrangements? Are you #/Very satisfied , Somewhat satisfied, Neither satisfied nor dissatisfied, Somewhat dissatisfied, Very dissatisfied/ Very dissatisfied , Somewhat dissatisfied , Neither satisfied nor dissatisfied, Somewhat satisfied, Very satisfied/

- 1 VERY SATISFIED
- 2 SOMEWHAT SATISFIED
- 3 NEITHER SATISFIED NOR DISSATISFIED
- 4 SOMEWHAT DISSATISFIED
- 5 VERY DISSATISFIED
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 4 OR 5 IN Q23 ASK

[Multiple] {Spread:20 }

Q23a. Why were you dissatisfied?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (PLEASE SPECIFY)

98 Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 1 OR 2 IN Q23 ASK

[Multiple] {Spread:20 }

Q23b. Why were you satisfied?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (PLEASE SPECIFY)

98 Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

ENDIF

IF CODE 2 IN Q21

[Multiple] {Spread:20 }

Q24. Why haven't you made any changes to the way you buy electricity?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 CONCERN WITH THE SWITCHING PROCESS
- 2 COULD NOT BE BOTHERED / TOO MUCH EFFORT
- 3 THE INFORMATION IS TOO COMPLEX/THERE'S TOO MUCH TO SORT THROUGH/ TOO MUCH TO FIGURE OUT/TOO TECHNICAL
- 4 HAPPY WITH CURRENT ELECTRICITY COMPANY
- 5 HIGHER COSTS WITH OTHER ELECTRICITY COMPANIES
- 6 INADEQUATE POTENTIAL SAVINGS
- 7 INSUFFICIENT INFORMATION / NOT ENOUGH INFORMATION
- 8 COULDN'T UNDERSTAND THE INFORMATION/ INFORMATION IS VAGUE/ AMBIGUOUS/ POORLY WRITTEN/POORLY ORGANISED
- 9 LACK OF CONFIDENCE IN THE NEW ELECTRICITY COMPANY
- 10 WAITING FOR BETTER OFFERS
- 11 DIDN'T KNOW I COULD SWITCH
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 Single DON'T KNOW/NOT SURE/CAN'T SAY

CODES IN Q24a WILL BE RANDOMISED

[Single] {Random}

Q24a. Which of the following would be the one most effective incentive to encourage you to change electricity companies or change the way you buy electricity?

READ OUT

- | | | |
|----|-------|---|
| 1 | | Lower retail prices |
| 2 | | Free gifts |
| 3 | | Green energy |
| 4 | | Having electricity and gas with one company |
| 5 | | Early payment bonuses |
| 6 | | Improved customer service |
| 7 | Fixed | (DO NOT READ) NOTHING WOULD BE AN EFFECTIVE INCENTIVE |
| 98 | Fixed | DON'T KNOW/NOT SURE/CAN'T SAY |

ENDIF

ENDIF

ASKALL

[Single]

Q25. In the next twelve months, how likely or unlikely is it that you will change your supply arrangements with your current electricity company ? Is it #/Very likely, Somewhat likely, Neither unlikely nor likely, Somewhat unlikely, Very unlikely/Very unlikely, Somewhat unlikely, Neither unlikely nor likely, Somewhat likely, Very likely/

- 1 VERY LIKELY
- 2 SOMEWHAT LIKELY
- 3 NEITHER UNLIKELY NOR LIKELY
- 4 SOMEWHAT UNLIKELY
- 5 VERY UNLIKELY
- 98 Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q25a. In the next twelve months, how likely or unlikely is it that you will switch to another electricity company? Is it #/Very likely, Somewhat likely, Neither unlikely nor likely, Somewhat unlikely, Very unlikely/Very unlikely , Somewhat unlikely, Neither unlikely nor likely, Somewhat likely, Very likely/

- 1 VERY LIKELY
- 2 SOMEWHAT LIKELY
- 3 NEITHER UNLIKELY NOR LIKELY
- 4 SOMEWHAT UNLIKELY
- 5 VERY UNLIKELY
- 98 Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q26. Have you looked for any information in the last 12 months to assist you in making a decision about changing your electricity supply arrangements with an electricity supplier, whether you have taken out a contract or not?

DO NOT READ OUT

- 1 YES
- 2 NO
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN Q26 ASK

[Multiple]

Q27. What were the sources of the information?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 NEWSPAPER ADVERTISEMENTS
- 2 RADIO ADS
- 3 MAGAZINE ADS
- 4 OUTDOOR ADS (BUS SHELTERS, BILLBOARDS, ETC.)
- 5 ICRC
- 6 FRIENDS/FAMILY/WORK COLLEAGUES
- 7 INTERNET
- 8 NEWSPAPERS
- 9 RADIO
- 10 REPRESENTATIVE OF THE ELECTRICITY COMPANY
- 11 THE ELECTRICITY COMPANY
- 12 TELEVISION
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 Single DON'T KNOW/NOT SURE/CAN'T SAY

Think about the information you obtained, on a scale of #/1 to 5 where 1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 to 1 where 5 is "disagree strongly", 4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/, please rate your level of agreement with the following:

[Single]

Q27A1. The information was easy to obtain

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q27A2. The information was easy to understand

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q27A3. The information made it easy to compare offers

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q27A4. There was sufficient information for me to make an informed choice

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

ENDIF

ASKALL

[Single]

Q31. Does the amount of money you spend on your energy bills affect your ability to meet other household expenditures?

DO NOT READ OUT

- 1 YES
- 2 NO
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

CODES IN Q35 WILL BE RANDOMISED

[Multiple] {Spread:20 Random}

Q35. Have you experienced any of the following?

READ OUT

HIGHLIGHT ALL MENTIONED

- 1 The actual price you were charged did not match the prices you were quoted by the energy company
- 2 You entered into a contract in order to get more information
- 3 You felt pressured into signing a contract with an energy company
- 4 You were told things about the terms and conditions of the contract that did not prove to be true
- 5 You were transferred to another energy company without your explicit consent
- 6 You were unable to terminate your energy contract during the cooling off period
- 7 You entered into a contract simply to get the person to leave your house and/ or hang up the phone
- 98 Fixed (DO NOT READ OUT) NONE OF THESE

[Single]

Q36 Have you ever made a complaint about your electricity company?

DO NOT READ OUT

- 1 YES
- 2 NO
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN Q36 ASK

[Multiple] {Spread:20 }

Q37. Who did you complain to?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

INTERVIEWER NOTE: ACAT IS RELATIVELY NEW (FEB 09) AND REPLACES ENERGY AND WATER CONSUMER COUNCIL, ESSENTIAL SERVICES CONSUMER COUNCIL AND ESSENTIAL SERVICES REVIEW COMMITTEE.

- 1 ACT CIVIL AND ADMINISTRATIVE TRIBUNAL (ACAT)
- 2 ICRC
- 3 ACCC
- 4 DECCEW
- 5 LOCAL MP / MINISTER FOR ENERGY
- 6 ACT OFFICE OF REGULATORY SERVICES (FAIR TRADING)
- 7 THE ELECTRICITY COMPANY
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 Single DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

IF CODE 2 OR 98 IN Q36 ASK

[Multiple] {Spread:20 }

Q38. If you ever did need to complain about your electricity company, who would you go to?

DO NOT READ OUT

HIGHLIGHT ALL MENTIONED

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 ACT CIVIL AND ADMINISTRATIVE TRIBUNAL (ACAT)
- 2 ICRC
- 3 ACCC
- 4 DECCEW
- 5 LOCAL MP / MINISTER FOR ENERGY
- 6 ACT OFFICE OF REGULATORY SERVICES (FAIR TRADING)
- 7 THE ELECTRICITY COMPANY
- 97 Openend OTHER (PLEASE SPECIFY)
- 98 Single DON'T KNOW/NOT SURE/CAN'T SAY

ENDIF

CODES IN Q40 WILL BE RANDOMISED

[Single] {Random}

Q40. Would you say...

READ OUT

- 1 There is a greater variety of offers available from electricity companies compared to a year ago
- 2 There is a smaller variety of offers available from electricity companies compared to a year ago
- 3 The variety of offers available from electricity companies compared to a year ago is about the same
- 98 Fixed (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q42. Are you aware of the availability of any independent assistance to help in making energy decisions, such as Goswitch or other brokers?

DO NOT READ OUT

- 1 YES
- 2 NO
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

Q43. Have you contacted your electricity company in the past twelve months?

DO NOT READ OUT

- 1 YES
- 2 NO
- 98 DON'T KNOW/NOT SURE/CAN'T SAY

IF CODE 1 IN Q43 ASK

When you contacted your electricity company in the past twelve months, how satisfied were you with the following? Please rate on a scale of #/1 to 5 where 1 is very satisfied, 2 is somewhat satisfied, 3 is neither satisfied nor dissatisfied, 4 is somewhat dissatisfied and 5 is very dissatisfied/ 5 to 1 where 5 is very dissatisfied, 4 is somewhat dissatisfied, 3 is neither satisfied nor dissatisfied, 2 is somewhat satisfied and 1 is very satisfied/

[Single]

Q44A1. The timeliness of the response

- | | |
|---|--|
| 1 | 1 - VERY SATISFIED |
| 2 | 2 - SOMEWHAT SATISFIED |
| 3 | 3 - NEITHER SATISFIED NOR DISSATISFIED |
| 4 | 4 - SOMEWHAT DISSATISFIED |
| 5 | 5 - VERY DISSATISFIED |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q44A2. The assistance provided

- | | |
|---|--|
| 1 | 1 - VERY SATISFIED |
| 2 | 2 - SOMEWHAT SATISFIED |
| 3 | 3 - NEITHER SATISFIED NOR DISSATISFIED |
| 4 | 4 - SOMEWHAT DISSATISFIED |
| 5 | 5 - VERY DISSATISFIED |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

ENDIF

Think about the information given to you by an electricity company, on a scale of #/1 to 5 where 1 is "agree strongly", 2 is "agree somewhat", 3 is "neither agree nor disagree", 4 is "disagree somewhat" and 5 is "disagree strongly"/ 5 to 1 where 5 is "disagree strongly", 4 is "disagree somewhat", 3 is "neither agree nor disagree", 2 is "agree somewhat" and 1 is "agree strongly"/, please rate your level of agreement with the following:

[Single]

Q45a. I would go to my energy company for advice on purchasing a new energy appliance.

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q45b. I would go to my energy company for advice on improving my energy efficiency and decreasing my energy use.

- | | |
|---|--------------------------------|
| 1 | 1 - AGREE STRONGLY |
| 2 | 2 - AGREE SOMEWHAT |
| 3 | 3 - NEITHER AGREE NOR DISAGREE |
| 4 | 4 - DISAGREE SOMEWHAT |
| 5 | 5 - DISAGREE STRONGLY |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q45c. I would go to my energy company for advice on feed-in tariffs.

INTERVIEWER NOTE: A FEED-IN TARIFF IS THE PREMIUM PAID BY A UTILITY TO ITS CONSUMERS FOR EXCESS POWER GENERATED BY THEIR SOLAR, WIND, OR ALTERNATIVE ENERGY SYSTEM. FEED-IN TARIFFS ARE USED BY GOVERNMENT AS INCENTIVE FOR CONSUMERS TO ADOPT NEWER, CLEANER, RENEWABLE ENERGY SOURCES

- 1 1 - AGREE STRONGLY
- 2 2 - AGREE SOMEWHAT
- 3 3 - NEITHER AGREE NOR DISAGREE
- 4 4 - DISAGREE SOMEWHAT
- 5 5 - DISAGREE STRONGLY
- 6 DON'T KNOW/NOT SURE/CAN'T SAY

Now, I'd like to ask you a few questions just for classification purposes.

[Single]

1. Which of the following broad categories best describes your household situation?

READ OUT

- 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
- 99 (DO NOT READ OUT) REFUSED

[Single]

2. Do you currently receive an energy concession on your electricity bill?

DO NOT READ OUT

- | | |
|----|-------------------------------|
| 1 | YES |
| 2 | NO |
| 98 | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

3. How many people live in your household?

DO NOT READ OUT

- | | |
|----|-------------------------------|
| 1 | ONE |
| 2 | TWO |
| 3 | THREE |
| 4 | FOUR |
| 5 | FIVE |
| 6 | SIX |
| 7 | SEVEN |
| 8 | EIGHT |
| 9 | NINE |
| 10 | TEN |
| 11 | MORE THAN TEN |
| 98 | DON'T KNOW/NOT SURE/CAN'T SAY |
| 99 | (DO NOT READ OUT) REFUSED |

[Single]

4. Do you...?

READ OUT

1 own your home /pay a mortgage

2 pay rent

97 Openend Other (Please Specify)

98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY

[Single]

5. Can you please tell me your age?

DO NOT READ OUT

1 18 - 24

2 25 - 30

3 31 - 39

4 40 - 54

5 55 - 64

6 65+

[Single]

6. What is your highest level of education?

DO NOT READ OUT

- 1 PRIMARY SCHOOL
- 2 HIGH SCHOOL
- 3 TERTIARY
- 4 POSTGRADUATE
- 97 Openend OTHER (PLEASE SPECIFY)
- 99 REFUSED

[Single]

7. Which of the following best describe your Gross Annual Household Income?

READ OUT

- 1 Under \$15,000
- 2 \$15,001 - 25,000
- 3 \$25,001 - 35,000
- 4 \$35,001 - 50,000
- 5 \$50,001 - 75,000
- 6 \$75,001 - 100,000
- 7 More than \$100,000
- 98 (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
- 99 (DO NOT READ OUT) REFUSED

[Quantity] {Min: 0, Max: 9999, Default Value:9998Refusal Code:9999}

8. Can I please have your postcode?

INTERVIEWER NOTE: IF CAN'T SAY OR REFUSES, TYPE 9999.

That's the final question. Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you have provided will be used only for research purposes. We are conducting this survey on behalf of the Australian Energy Market Commission.

If you would like any more information about this project or Roy Morgan Research, you can phone us on 1800 337 332

[Single]

QSEX. RECORD SEX OF RESPONDENT

- | | |
|---|--------|
| 1 | MALE |
| 2 | FEMALE |