

# Effectiveness of Competition in the ACT Electricity Retail Market- Small Businesses

*- Prepared for -*

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## **1. EXECUTIVE SUMMARY**

Four hundred sixty four small-scale users of electricity for business purposes in the ACT were surveyed by telephone in May 2010. The goal was to learn about their attitudes and behaviours regarding use of electricity for the business. The study will assist the AEMC in their review of the competitiveness of the retail electricity market in the ACT. Key findings of the study were:

- 58% of the businesses were aware they had a choice of suppliers
- 88% of the respondents were ActewAGL customers. No other company accounted for more than 3%. About half the sample (49%) could not name a second electricity company servicing the ACT
- More than three quarters of the sample (82%) said they had not been approached by an electricity company offering to sell the service; 94% have not approached a company on their own
- Those in contact with electricity companies found the information received easy to obtain and understand but information did not make it easy to compare offers
- Only 9% of businesses surveyed have switched electricity companies since competitiveness went into effect in 2003. Better rates/prices were an important motivator. Moving the business location rarely motivated a switch of suppliers. Satisfaction with the current supplier and inertia were primary reasons for not switching
- Businesses that switched electricity suppliers were generally satisfied with the process. People who changed arrangement with the current supplier (8%) 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. About four in five respondents said it was unlikely their business would switch suppliers or change supplier arrangements in the next 12 months
- Few businesses (6%) have looked for information about switching in the last 12 months. Twenty per cent have contacted their electricity company. Only 9% have complained about their electricity supplier. If there was an issue, the electricity company was named most often as the likely point of contact
- There was very limited awareness of any independent assistance available to help make decisions about electricity in the ACT.

In summary, ActewAGL is a dominant force in the supply of electricity to businesses in the ACT. Satisfaction and inertia are at work keeping people in businesses from getting very involved in information collection and the search for better offers. There is some

awareness of competing companies (by ~50% of the sample) but competitiveness overall is not strongly present in the ACT business electricity market. Switching is a rare event. Changing service plans within a company is rare as well. New offers/benefits/incentives for business users to consider are not prominent.

## **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 business 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 principles<sup>1</sup>:

- **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.

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



### **3. RESEARCH OBJECTIVES**

The overall objective of the business 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 business consumers is reported here. The report on domestic (residential) energy users is reported separately.

The quantitative research into the business use of electricity in the ACT evaluated whether business decision makers 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:

- awareness of competition and opportunities to choose and switch energy retailers
- the extent to which small-scale electricity users switch energy retailers for their business
- the extent to which small-scale business 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 the ACT.

## **4. METHODOLOGY**

### **4.1 Sample**

#### ***4.1.1 Definition of Qualified Survey Participant***

A qualified respondent was in the ACT telephone listings for businesses and was responsible in full or in part for decisions about the purchase of electricity for the business. Their monthly electricity bill had to be less than \$1500 per month.

#### ***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.

Calls were made daytime on weekdays when businesses were most likely to be open. 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 six telephone call attempts at varied times 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, business type, or business location.

### **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. Throughout the survey, interviewers emphasised that the questions were about the use of electricity for the business, not for domestic/home consumption.<sup>2</sup>

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<sup>2</sup> Of course, some businesses may be located in residences so the distinction between home and business consumption of electricity would have been blurred in some cases.

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### **4.3 Dates of Field Work**

#### ***4.3.1 Pilot Phase***

As the business questionnaire is similar to the residential questionnaire, changes resulting from the resident pilot phase (conducted 12 May 2010) was also applied to the business survey, where applicable. The business survey pilot was conducted on 17 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 18 May to 24 May 2010. A total of 464 surveys were completed. The average survey length was approximately 8 minutes.

### **4.4 Weighting Procedure**

Data was not weighted.

### **4.5 Sampling Variance / Reliability**

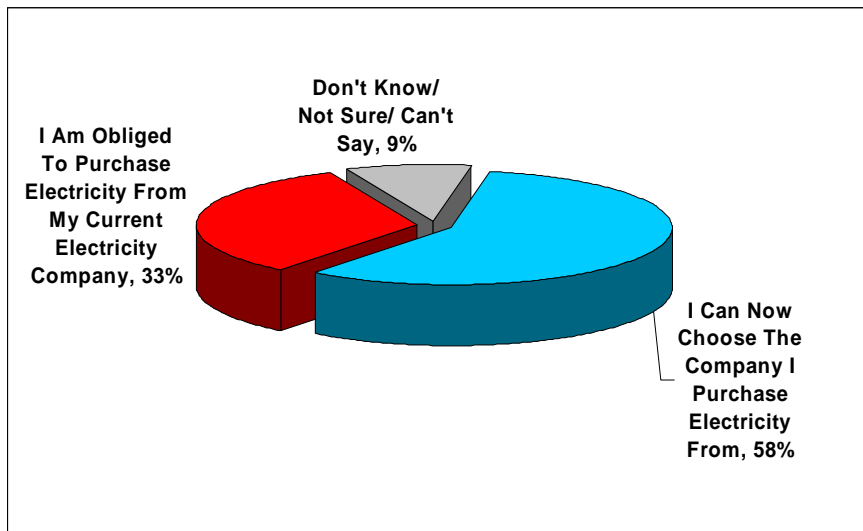
A sample size of 464 estimates population statistics with an accuracy of  $\pm 4.7\%$  at the 95% confidence level.

## 5. FINDINGS

### 5.1 Current Behaviour

Are business people in the ACT aware of the competitive environment for electricity? A majority are (58%). The remainder felt there was no choice (33%) or were not sure (9%) (Figure 1). Given that choice was introduced in 2003, the finding that 42% 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**

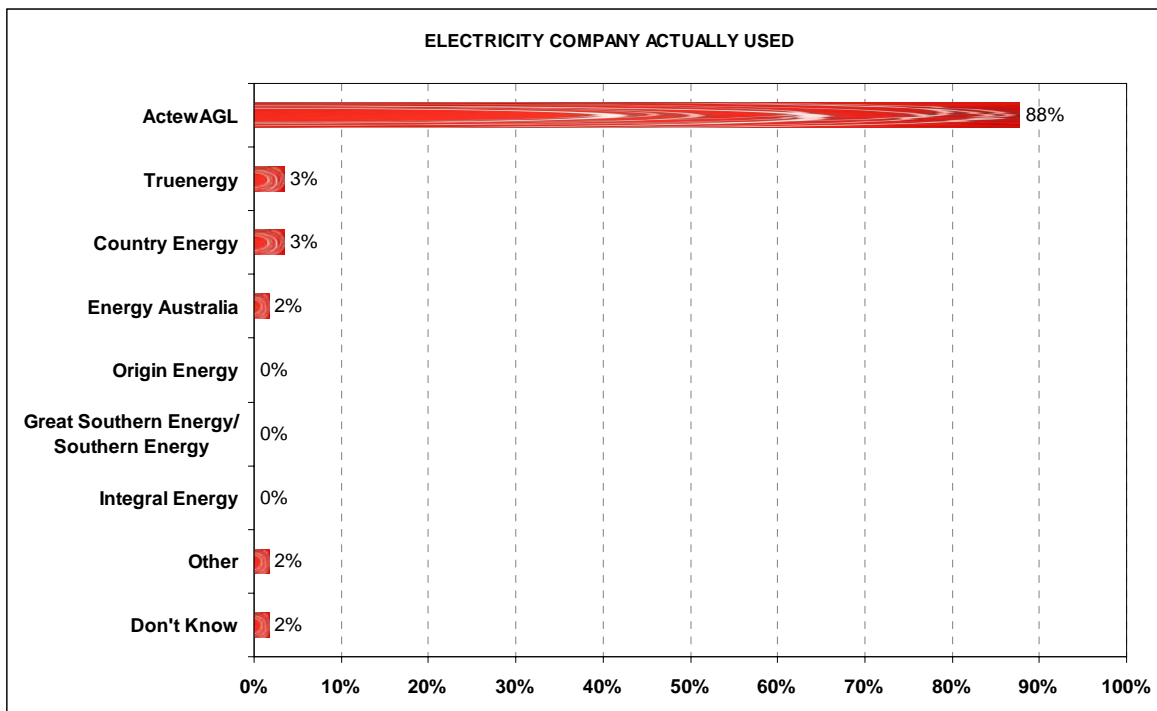


Base: All respondents (n=464)

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

Nearly 90% of business participants are currently ActewAGL<sup>3</sup> customers (Figure 2). No other company achieved more than a 3% share.

**Figure 2: Electricity Company Used**



Base: All respondents (n=464)

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

Table 1 shows what other companies could be named by customers of the top three suppliers of electricity. For the businesses surveyed, nearly half (49%) could not name another electricity company servicing the ACT (see Don't Know/Not Sure column). This finding is heavily driven by the 50.4% of ActewAGL customers who could not name another provider. ActewAGL was the other company most commonly named by customers of Country Energy and TRUenergy.

<sup>3</sup> Throughout this report, the company is referred to ActewAGL rather than ActewAGL Retail, following usage observed in the previously conducted qualitative research 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.

**Table 1<sup>4</sup>: Awareness of other Companies Offering Electricity as a Function of Current Supplier (Top Three Suppliers Named Only)**

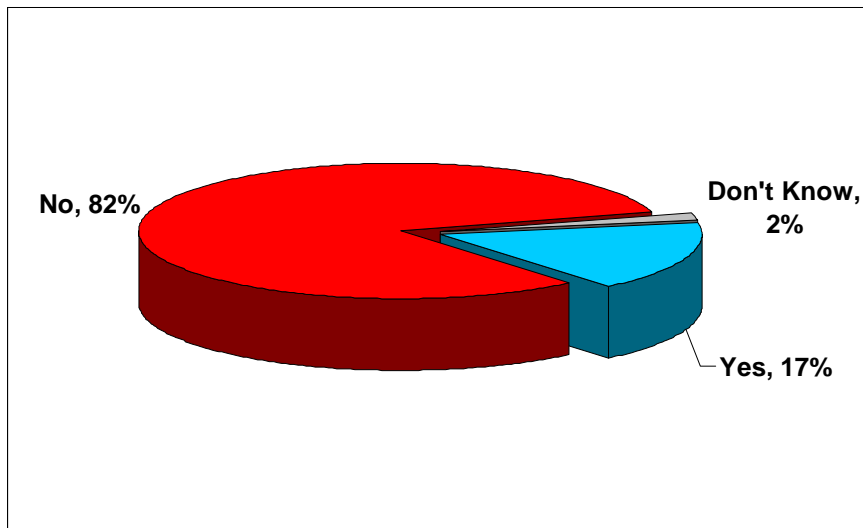
	ActewAGL	Country Energy	Energy Australia	Integral Energy	Origin Energy	TRUenergy	Great Southern Energy/Southern Energy	Other	Don't Know
ActewAGL	NA	21.40%	3.20%	0.70%	3.70%	2.50%	1.50%	8.10%	50.40%
Country Energy	43.80%	NA	0%	0%	6.20%	0%	0%	0%	50.00%
TRUenergy	81.20%	12.50%	0%	0%	0%	NA	0%	0%	18.80%
TOTAL									49%

Base: Customers of Top Three Companies (n=464)

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

More than 8 in 10 businesses (82%) claimed not to have been approached in any way by an electricity company offering to sell electricity (Figure 3). Note that this question did not specify a time period so it could have been construed as “ever approached.”

**Figure 3: Was Approached by an Electricity Company to Sell Electricity**



Base: All respondents (n=464)

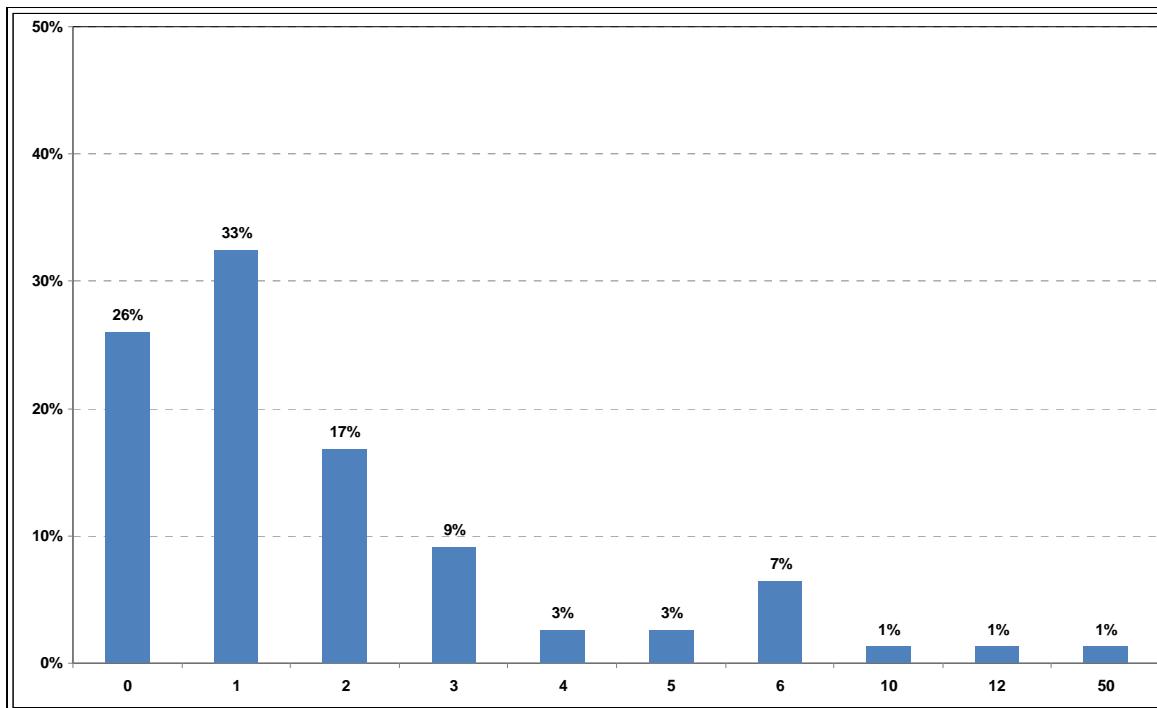
Q7. Have ANY electricity companies approached your business by any means and offered to sell you electricity?

Note: Percentages do not add up to 100% due to rounding.

<sup>4</sup> Note: Rows do not add to 100%: some people when asked for another supplier also named their own current supplier. These answers are excluded.

Of those who had been approached, one in four (26%) had not been contacted in the past 12 months. A majority (50%) had been contacted once or twice in the past 12 months. Another 12% were approached three or four times (Figure 4).

**Figure 4: Number of Times Approached In Last 12 Months**

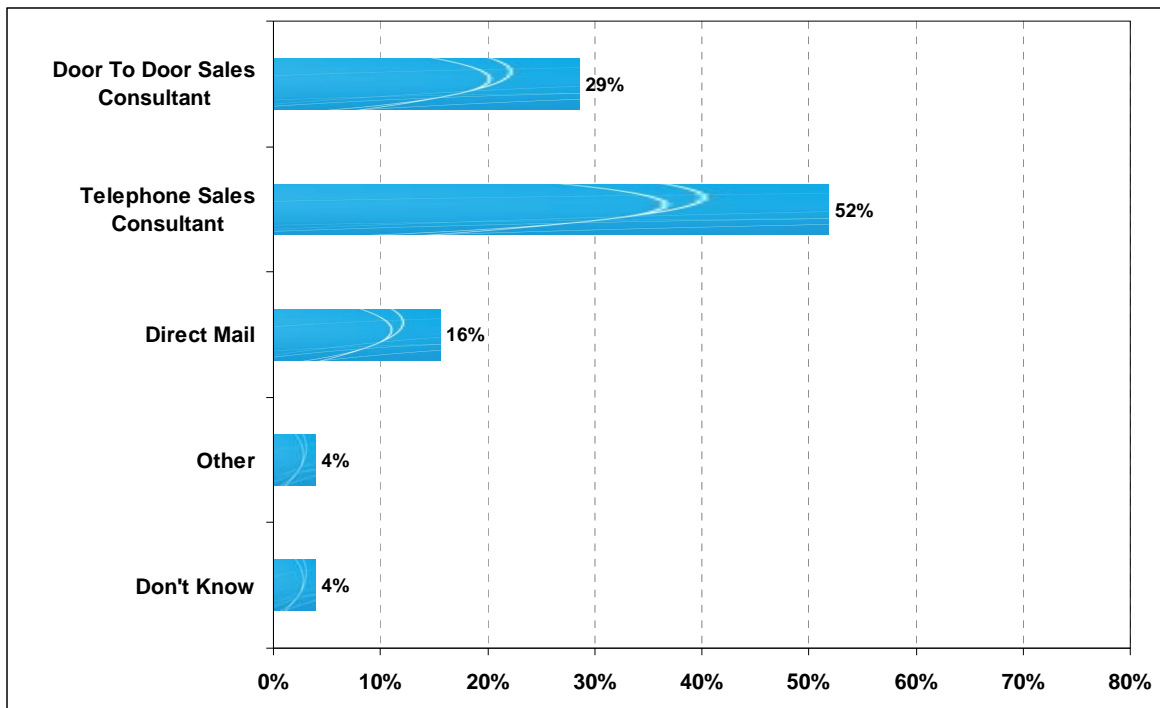


Base: Respondents who have been approached by elec. company (n=77)

Q7a. How many times has your business been approached in the last 12 months?

Figure 5 shows that telephone contacts were the most common method of offering electricity services (52%) followed by door-to-door (29%) for the most recent electricity company approaching the business.

**Figure 5: Method Company Used to Approach Business (Most recent contact)**



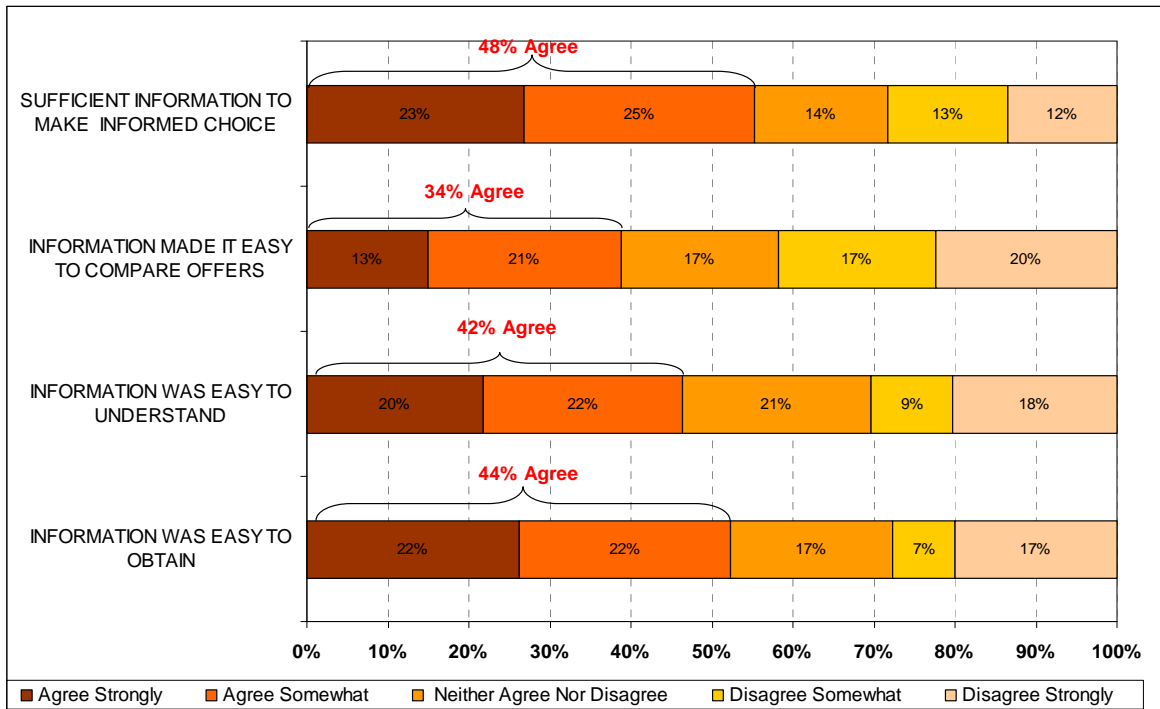
Base: Respondents who have been approached by electricity company (n=77)

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



For those who were approached by an electricity company, more than 40% agreed the information was easy to obtain and understand, and sufficient to make an informed choice (Figure 6). About a third (34%) agreed that information made comparisons easy to make.

**Figure 6: Factors Associated with Electricity Company**

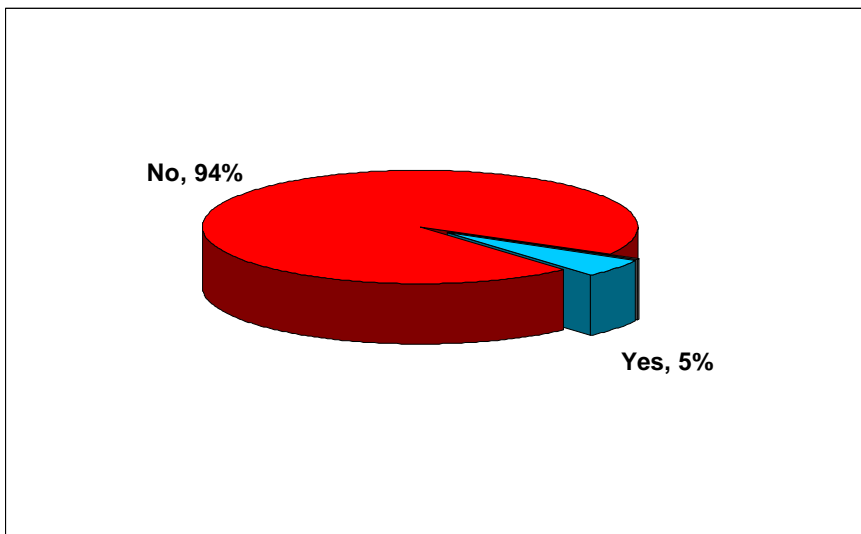


Base: Respondents who have been approached by electricity company (n=77)

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

Whereas 17% were approached by electricity companies, Figure 7 shows that the reverse was far rarer: very few businesses approached electricity companies for information about purchasing electricity (5%). This may be due to inertia, satisfaction with the current supplier, or lack of knowledge of other companies.

**Figure 7: Whether Approached Any Electricity Companies to Buy Electricity**



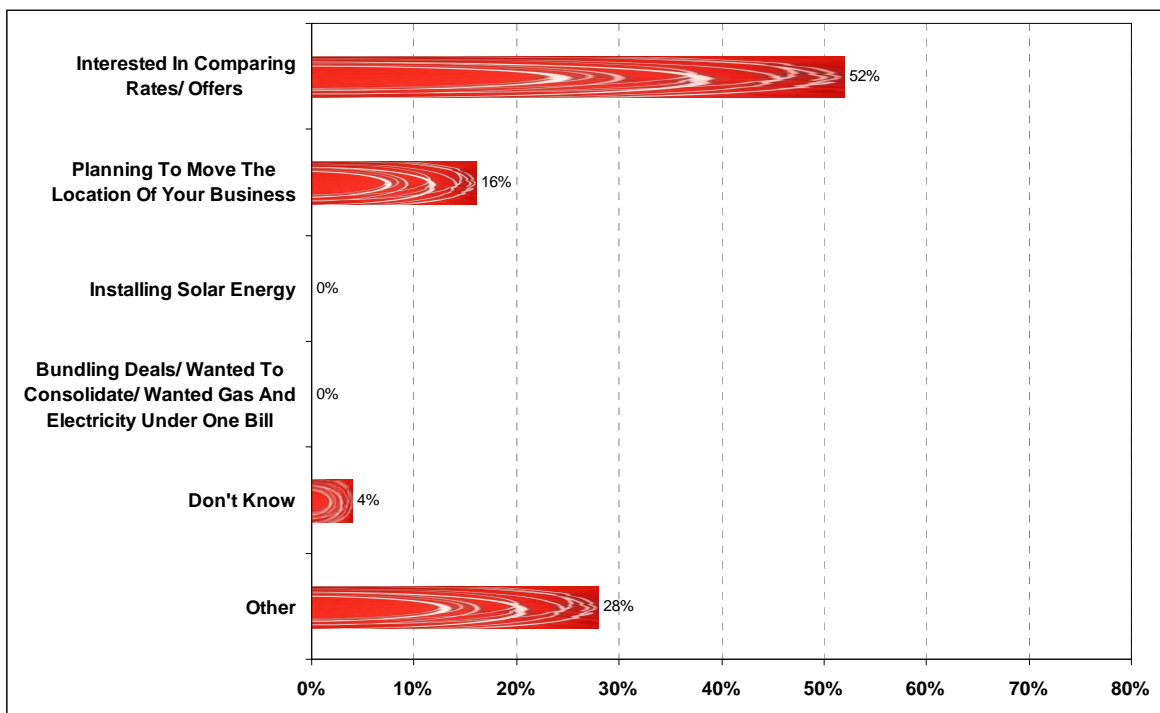
Base: All respondents (n=464)

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

Note: Percentages do not add up to 100% due to rounding.

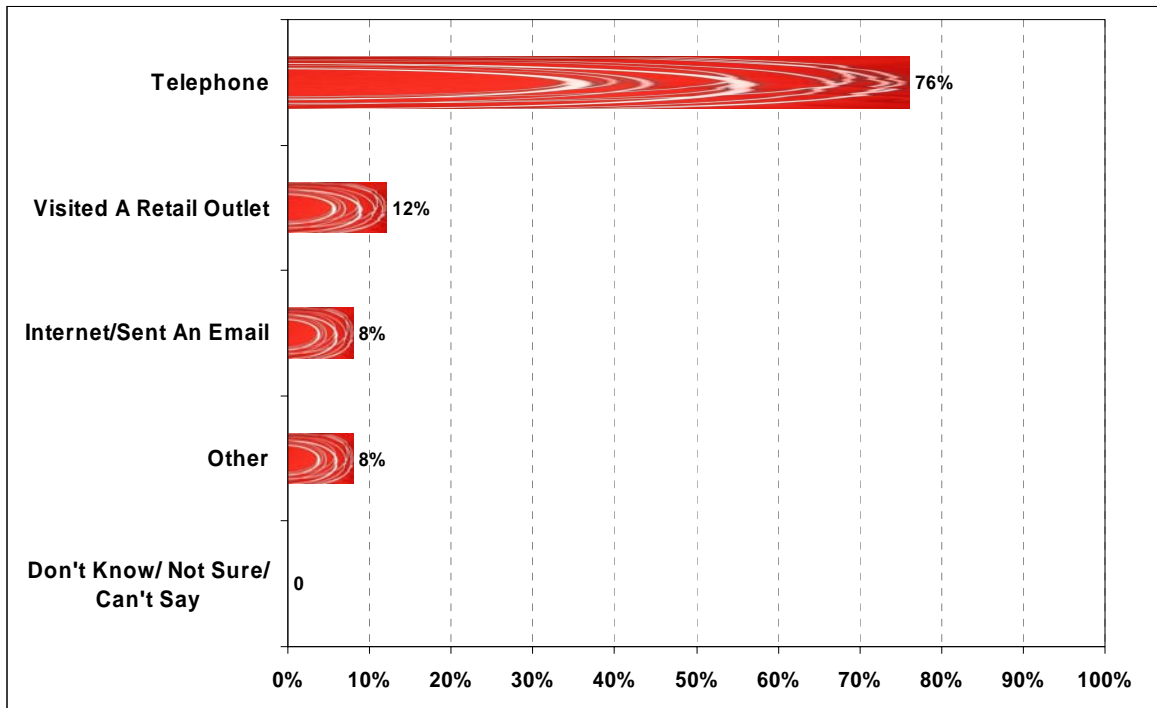
Of those who had approached an electricity company, a majority (52%) did so to make rate comparisons (Figure 8). Moving business location was not a prime motivator. Figure 9 shows that the telephone was the most common method to approach the company (76%) followed by retail outlet visits (12%) and internet/e-mail (8%).

**Figure 8: Reason for Approaching Any Electricity Companies (Caution: small base)**



Base: Those who approached an electricity company to ask about buying electricity respondents (n=25)  
Q10. Did you approach the electricity company because...?

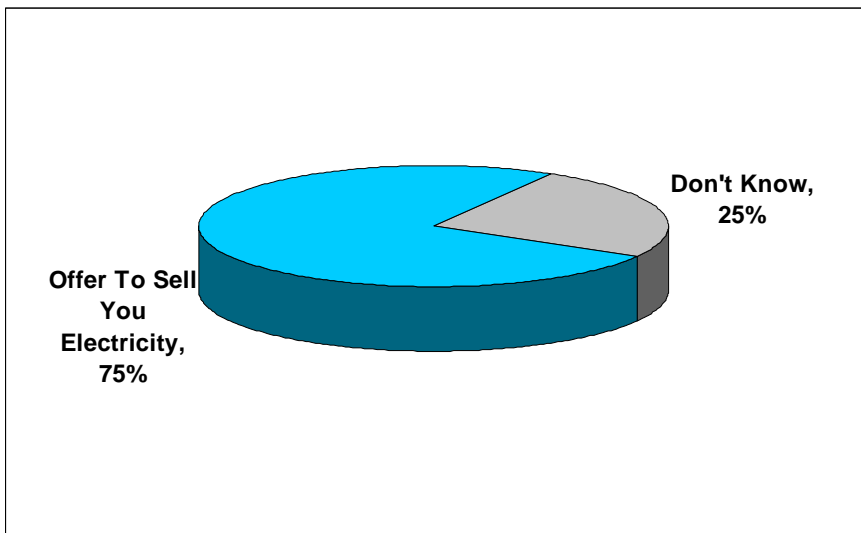
**Figure 9: Methods Customers used to Approach Electricity Suppliers**  
(Caution: small base)



Base: Those who approached an electricity company to ask about buying electricity respondents (n=25)  
Q11. Thinking about the last electricity company you approached, how did you do this?

Figure 10 indicates that people who were approached by an electricity company or themselves approached the company were usually offered the service for their business (75%). The balance were not sure. No one answered “no.”

**Figure 10: Refusal/Offer to Sell Electricity**



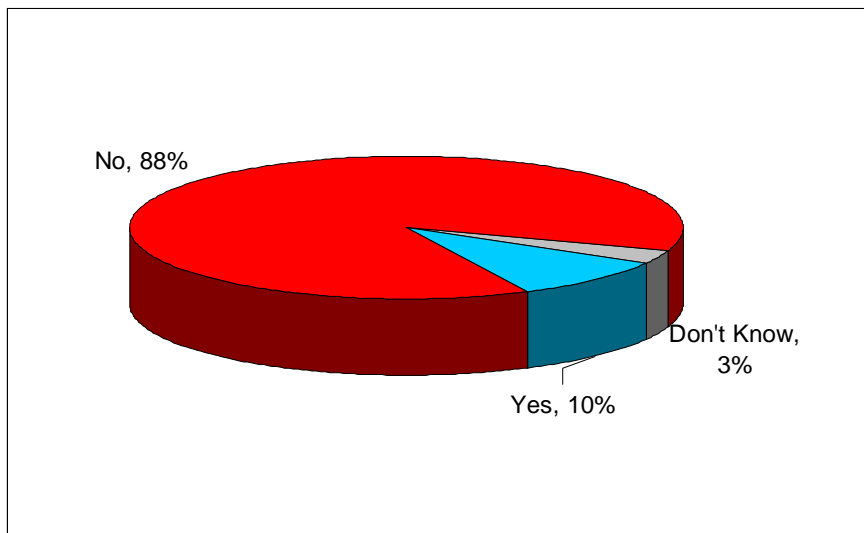
Base: Respondents who approached by or approached an electricity company (n=96)  
Q12. Did the company offer or refuse to offer to sell you electricity?

## 5.2 Switching

Of the total sample of 464 respondents, only 9% had switched electricity companies for their business since July 2003 when competition began in ACT compared to 88% who had not switched (Figure 11). 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.

For those who did switch, Figure 13 shows that switching generally entailed a change to one different company (80%), not a serial switching process (20% switched twice).

**Figure 11: Switching Since 2003**

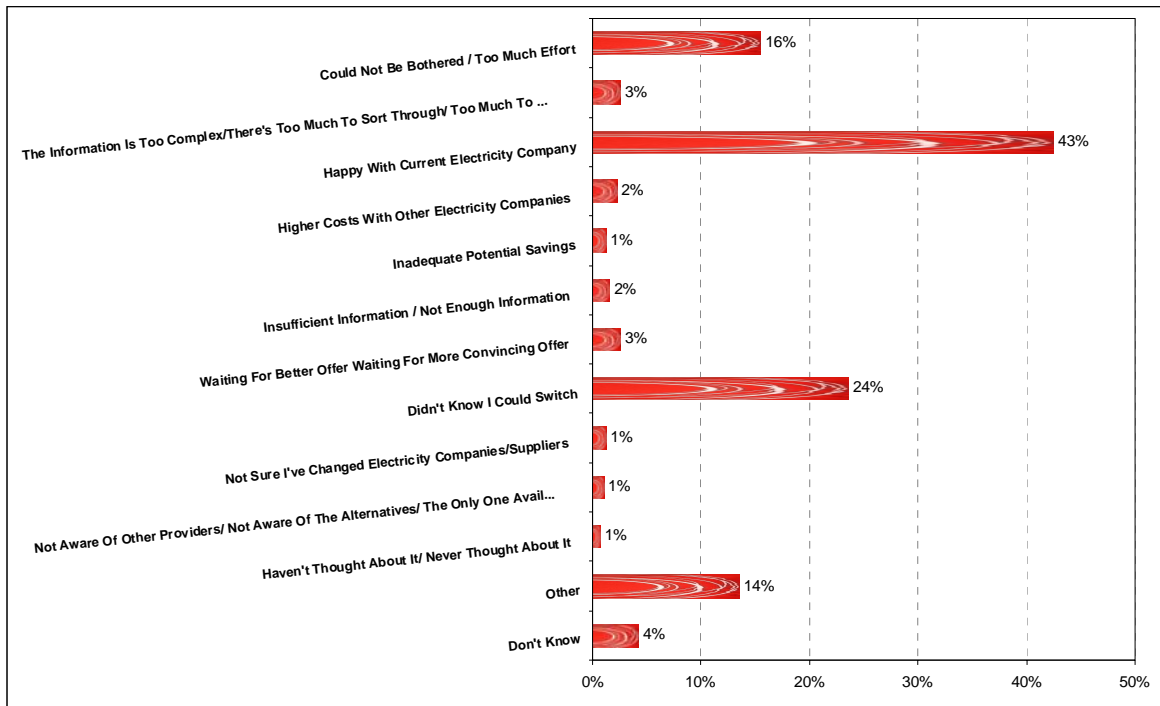


Base: All respondents (n=464)

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

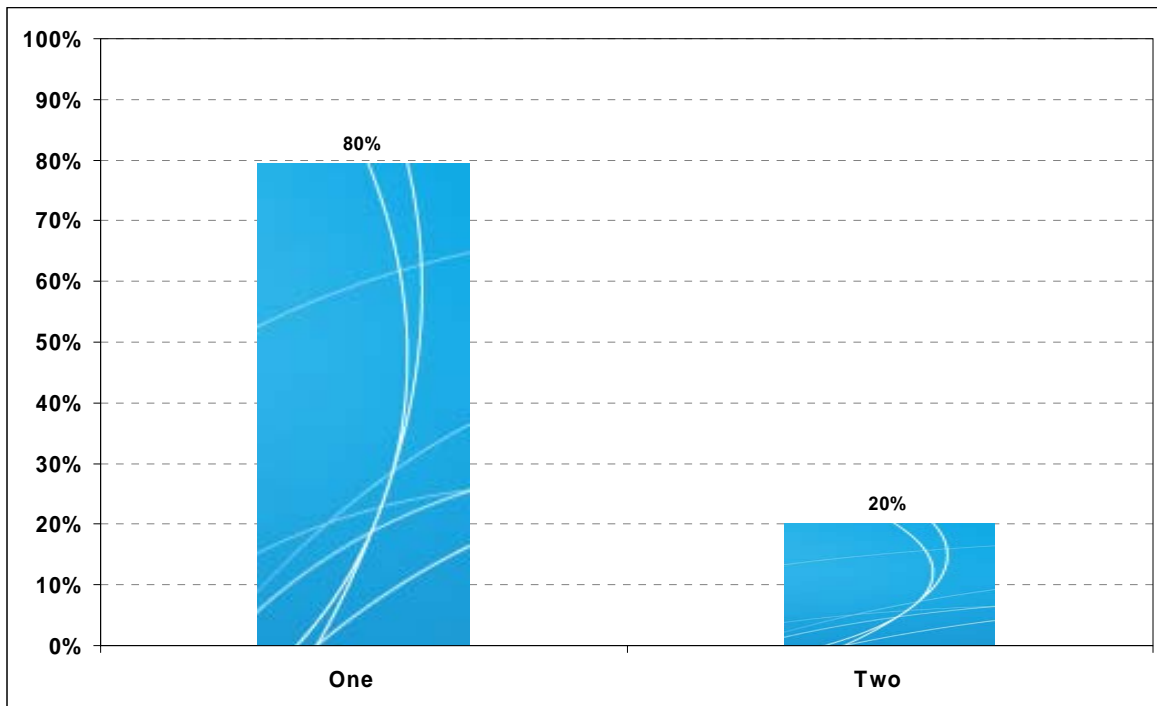
Note: Percentages do not add up to 100% due to rounding.

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



Base: Have not switched electricity companies n=407  
Q20. Why haven't you changed your electricity company?

**Figure 13: Number of Times Switched Electricity Companies**



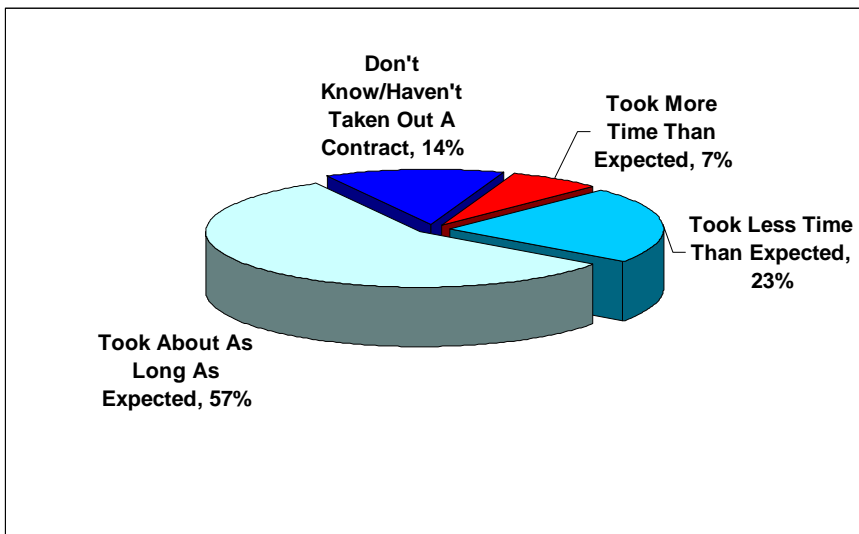
Base: Respondents who switched electricity companies (n=44)

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 (57%) or less time than expected (23%). Switching was rated as an easy task (89%) (Figure 14 and Table 2). In addition, the explanation received about the switching process was rated good to excellent by 63% of the respondents (Figure 15). For 91% of switchers, the process transpired about as expected (Table 3).



**Figure 14: Time that Switching Process Took**



Base: Respondents who switched electricity companies (n=44)

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

Note: Percentages do not add up to 100% due to rounding.

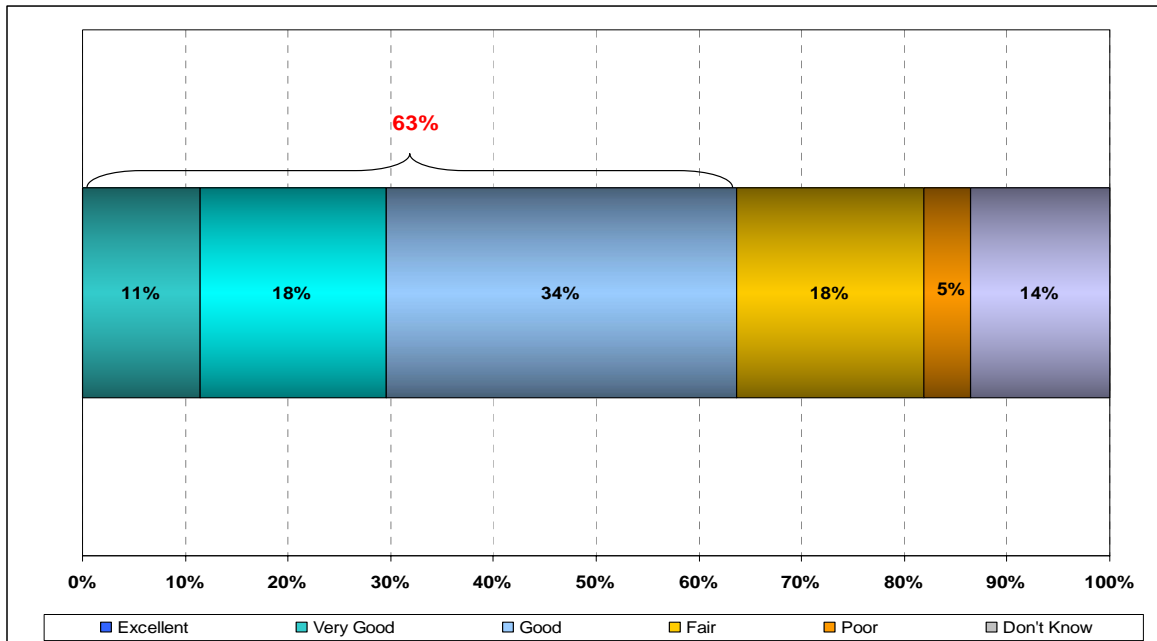
**Table 2: Ease of Switching Electricity Companies**

Very easy	Somewhat easy	Neither easy nor difficult	Somewhat difficult	Very difficult	Don't know
57%	32%	5%	2%	2%	2%
<b>89%</b>					

Base: Respondents who switched electricity companies (n=44)

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=44)  
 Q15b. How would you rate the explanation of the switching process?

**Table 3: Whether Switching went as Smoothly as Expected**

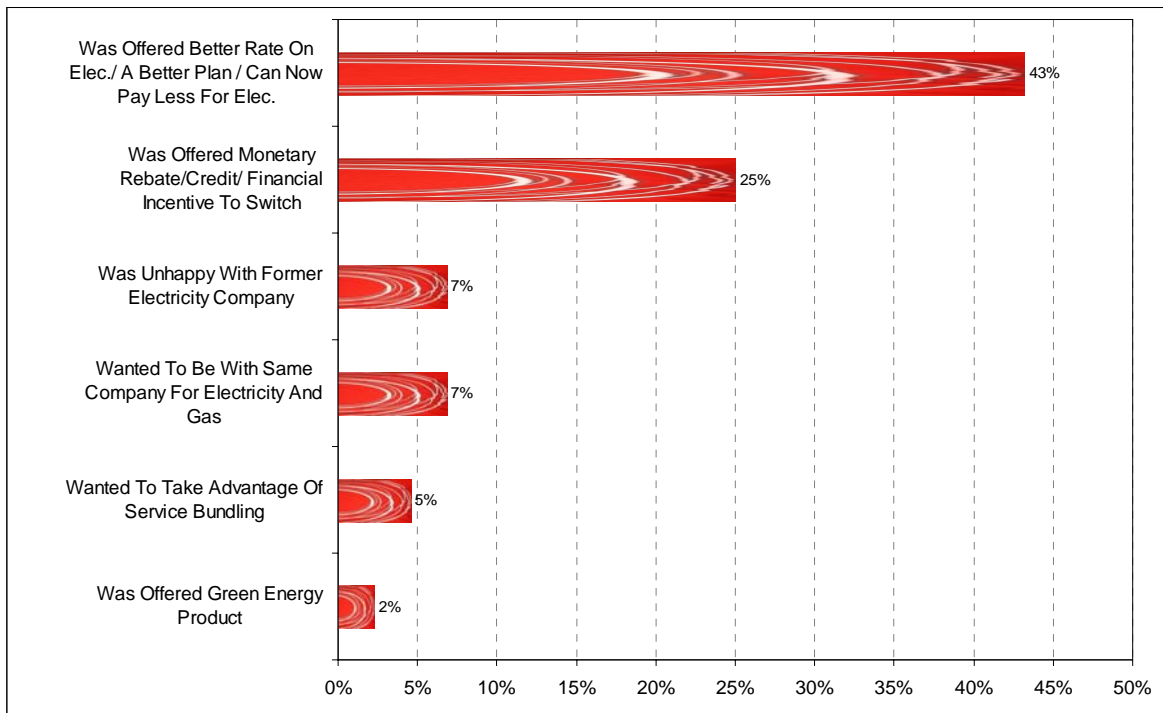
Yes	91%
No	7%
Don't Know	1%

Base: Respondents who switched electricity companies (n=44)  
 Q15c Did the switching process go smoothly, as expected?  
 Note: Percentages do not add up to 100% due to rounding.

There was no pattern to the comments from the 3 people for whom the switching did not go smoothly.

Figure 16 shows that reasons for switching focussed on general service/plan improvements (43%), and financial incentives (25%). Moving the business location was not a common motivator for switching suppliers, only 9% mentioned this reason (Figure 17).

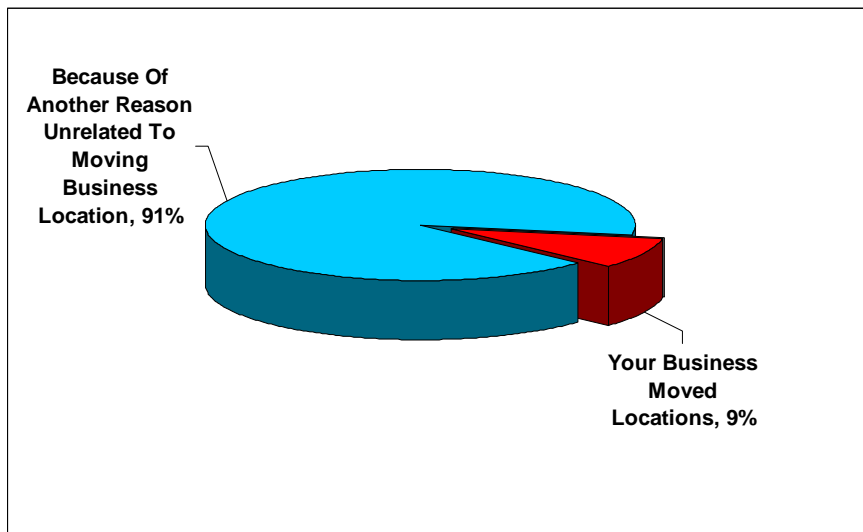
**Figure 16: Main Reason for Switching Providers**



Base: Respondents who switched electricity companies (n=44)

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

**Figure 17: Moving Business Location as Motivation for Switching**



Base: Respondents who switched electricity companies (n=44)

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

Satisfaction with the new electricity provider was strong for the 9% of the businesses who had switched. Sixty one percent of these respondents were either very satisfied or somewhat satisfied and most of the remainder provided a neutral rating (Table 4). Figure 18 shows that lower price was the primary reason<sup>5</sup>.

**Table 4: Satisfaction with New Provider**

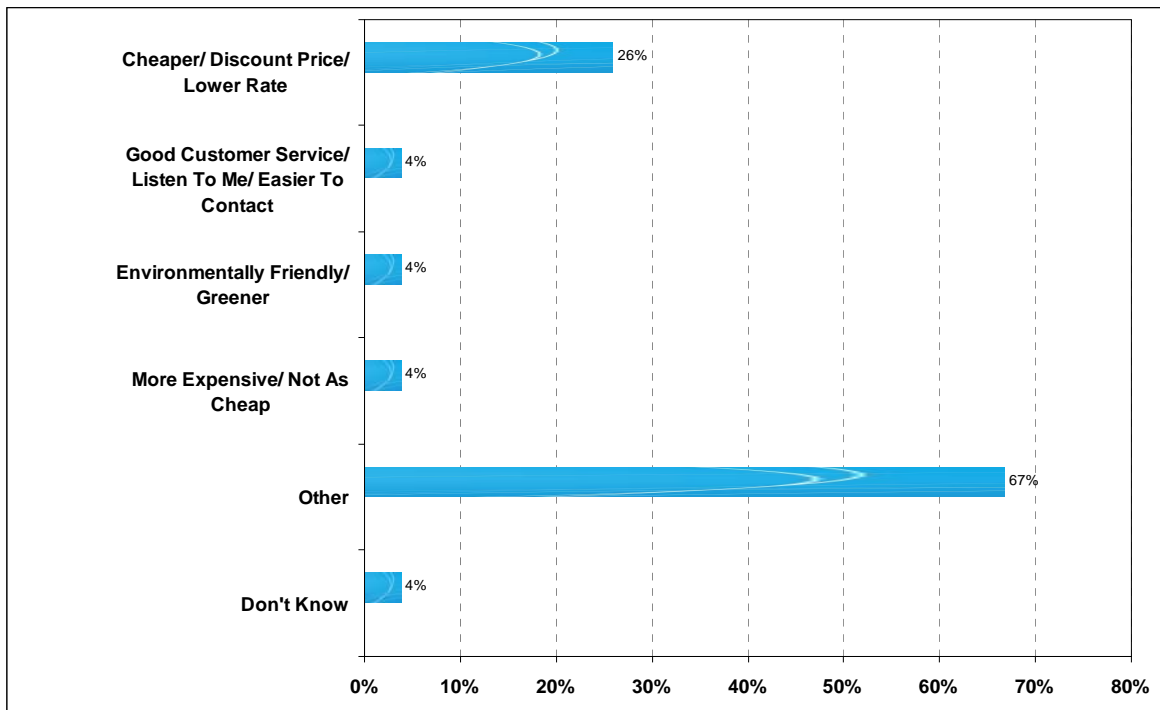
Very Satisfied	36%
Somewhat Satisfied	25%
<b>TOTAL SATISFIED</b>	<b>61%</b>
Neither Satisfied Nor Dissatisfied	32%
Somewhat Dissatisfied	2%
Very Dissatisfied	5%
<b>TOTAL DISSATISFIED</b>	<b>7%</b>
Don't Know	0%

Base: Respondents who switched electricity companies (n=44)

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

<sup>5</sup> Small sample base size (n=27) prevented the 67% of “Other” comments from rising above the criterion for coding.

**Figure 18: Reason Satisfied With New Provider (Caution: Small base size)**



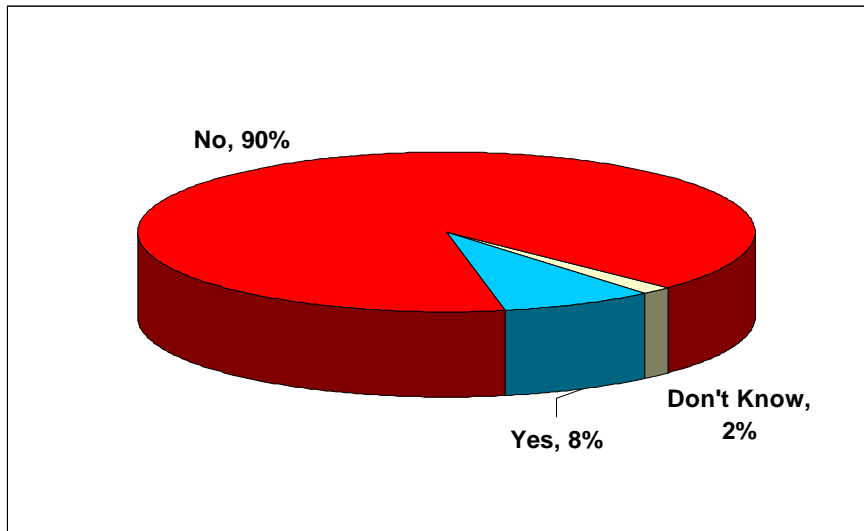
Base: Respondents satisfied with the switch to new electricity companies (n=27)  
Q18b Why are you satisfied with your new electricity company?

### **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 quite limited. Only 8% of businesses that had not switched suppliers, had changed electricity supply arrangements. A cooling off period was used by only 2% of the total sample (Figure 20).

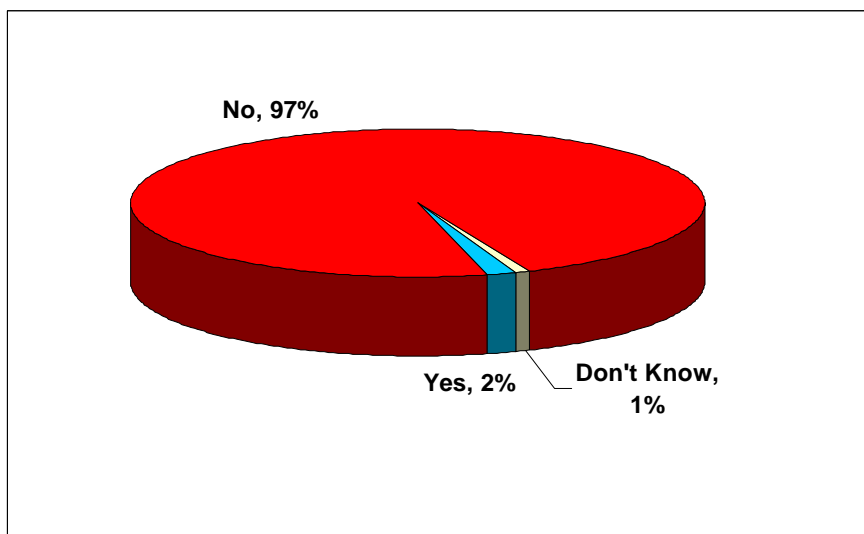
**Figure 19: Changed anything about the way company sells electricity to you**



Base: Have not switched suppliers or don't know (n=407)

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**

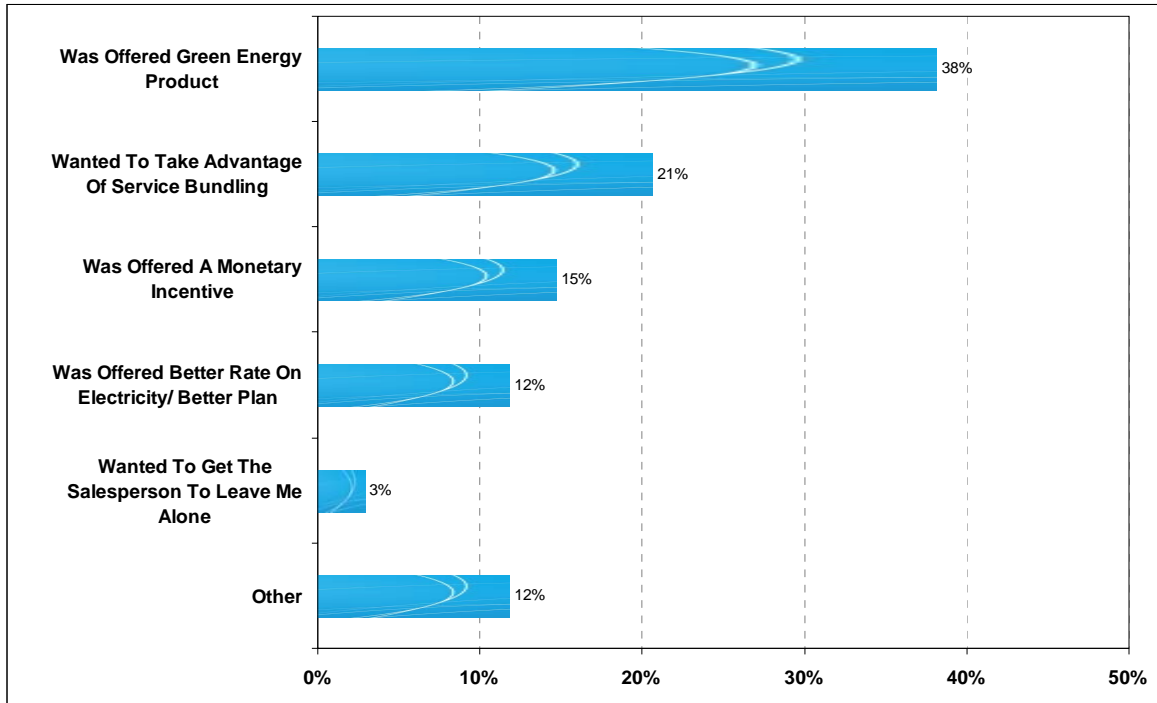


Base : Total Sample (n=464)

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 (38%), bundling (21%), and better prices (15%). References to green energy and bundling imply that supplier literature and promotional information are able to engage the business customer and affect behaviour regarding utility usage. Moving business location was cited by only 6% as a trigger for changing supply arrangements (Figure 22).

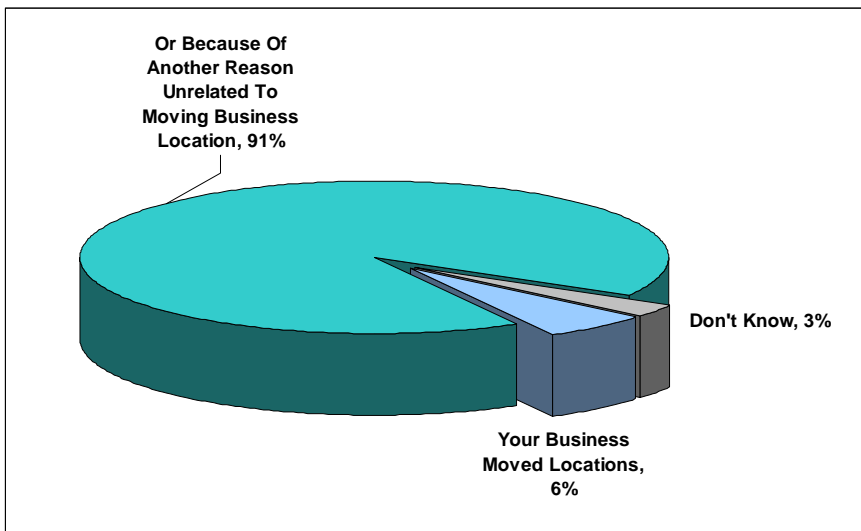
**Figure 21: One Main Reason for Changing Electricity Supply Arrangements with Current Company**



Base: Have changed arrangement with electricity company (n=34)

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 Business Location in Changed Arrangement with Electricity Company**

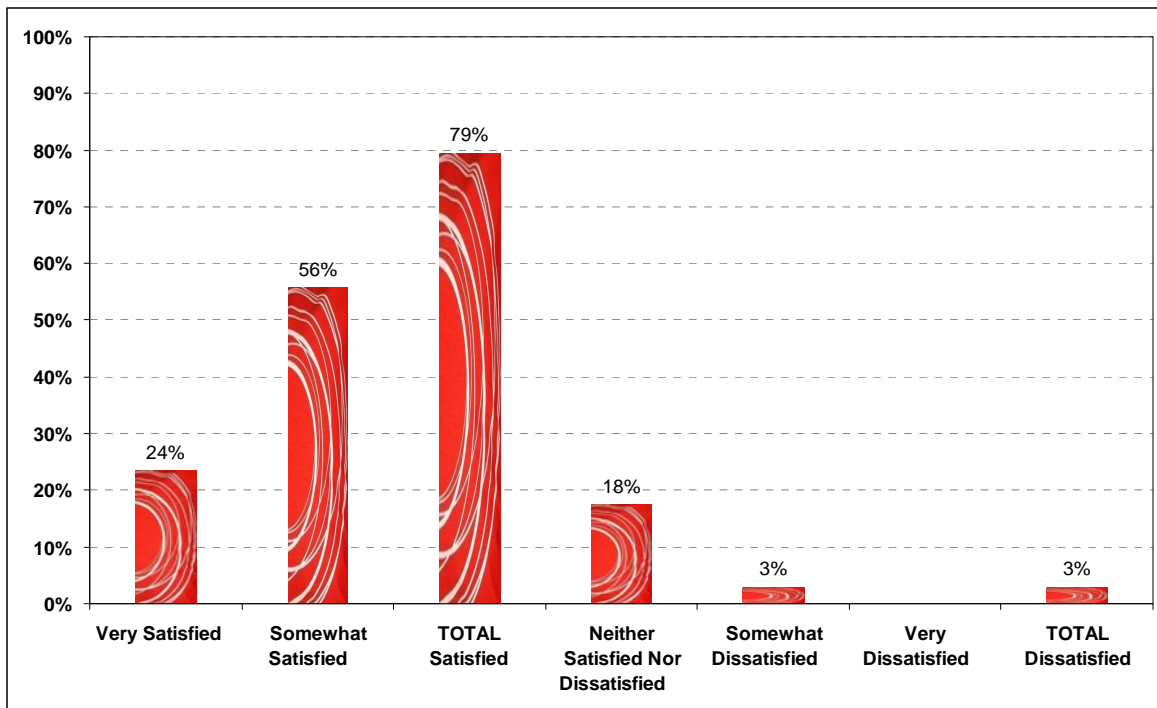


Base: n=34 Have changed arrangement with electricity company

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 79% very or somewhat satisfied compared to only 3% who were dissatisfied (Figure 23).

**Figure 23: Satisfaction/Dissatisfaction with New Electricity Supply Arrangements**

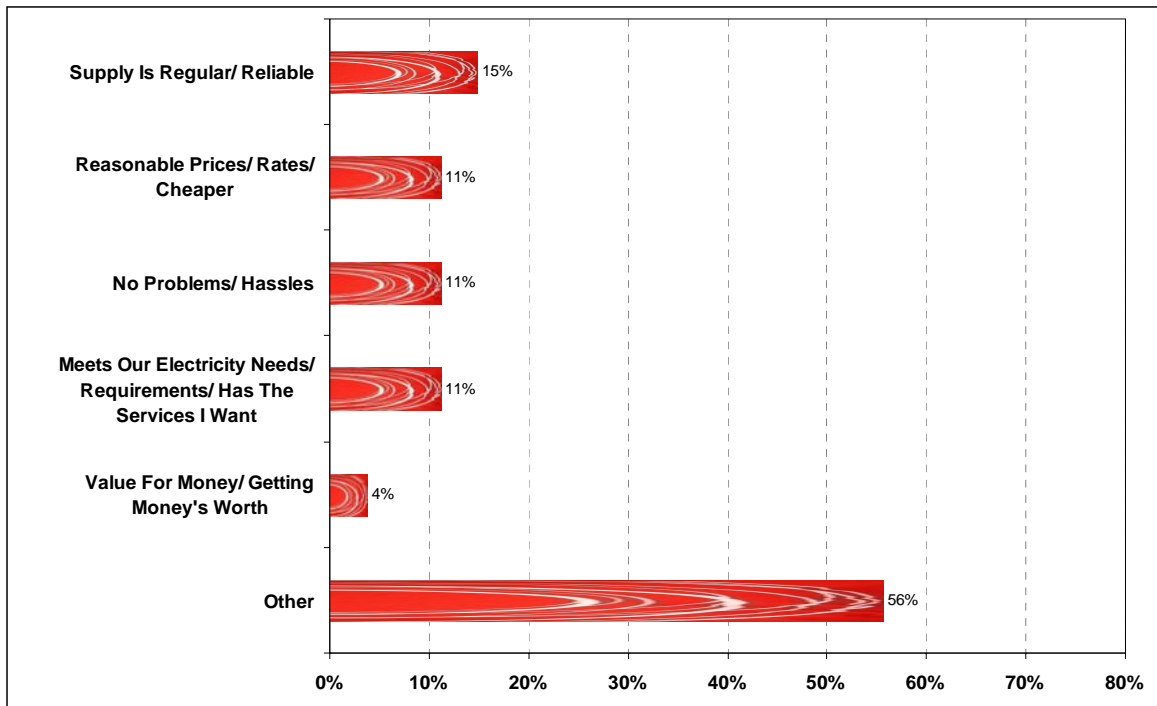


Base: n=34 Have changed arrangement with electricity company  
Q23. How satisfied or dissatisfied are you with the new electricity supply arrangements?

Reasons for satisfaction with the new arrangements referred to supply reliability (15%), better prices (11%), and no hassles (11%) (Figure 24).



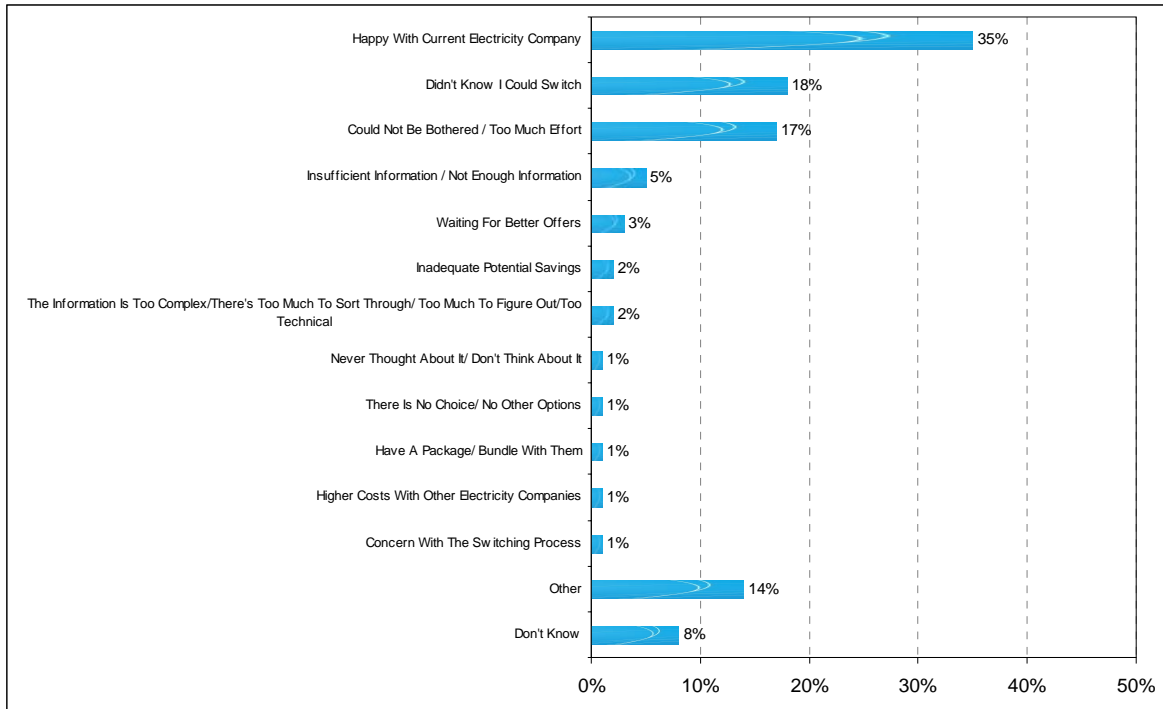
**Figure 24: Reasons for Satisfaction with New Electricity Supply Arrangements**  
(Caution: Small base size)



Base: Satisfied with change arrangement with electricity company (n=27)  
Q23b. Why were you satisfied?

For those businesses that 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?**

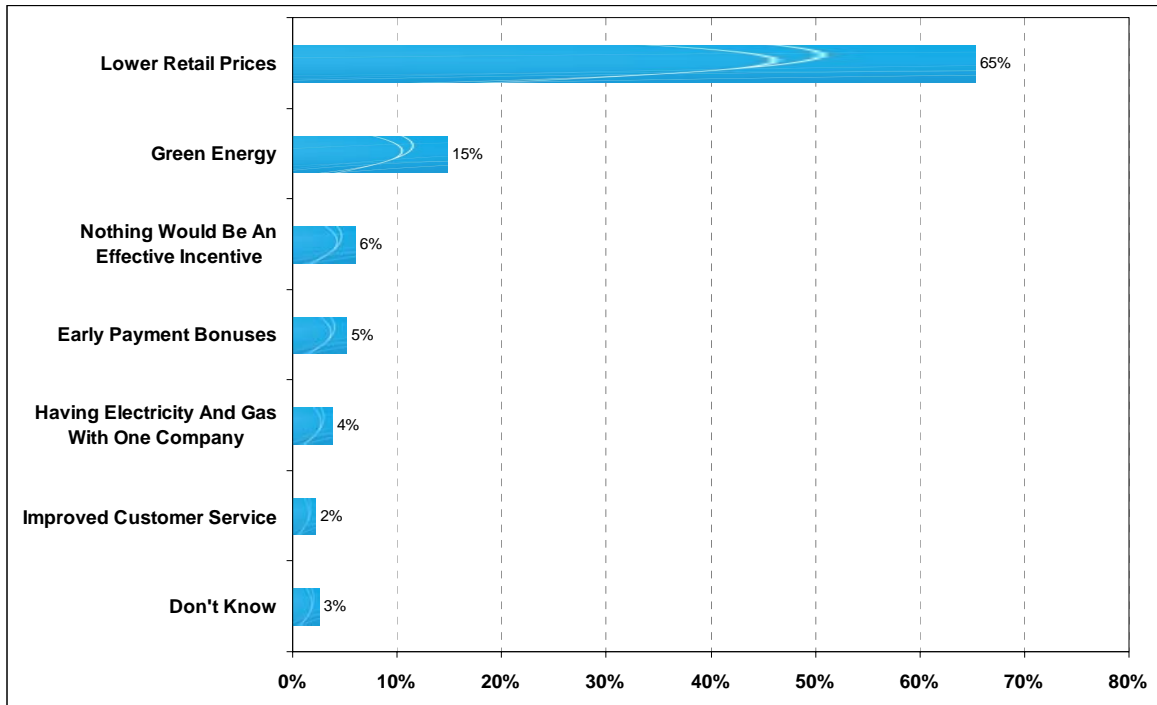


Base: Have not changed companies and not changed service arrangement with electricity company (n=366)  
 Q24. Why haven't you made any changes to the way you buy electricity?

**5.4 Changing Behaviour**

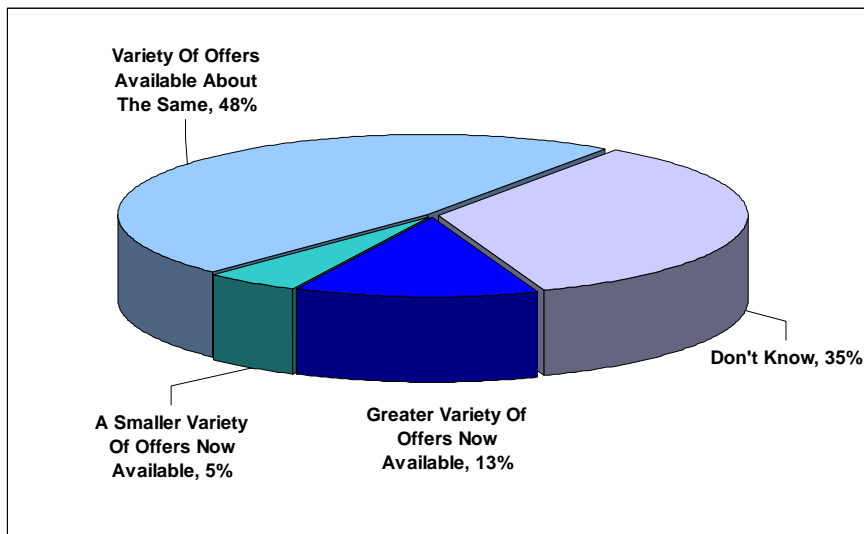
What incentives, if any, would encourage businesses to change companies or supply arrangements? Figure 26 shows that lower prices was clearly the most popular answer (65%), followed by green energy (15%). Only 13% of participants in the study felt that there were more offers available from electricity companies now than 12 months ago (Figure 27). Fully 83% thought the variety of offers either had not changed or they did not know. If competition for business electricity customers in ACT is modulating price increases, keeping prices down, or yielding an array of new services and pricing plans, most have not yet seen it or been convinced.

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



Base: Have not changed companies and not changed arrangement with electricity company (n=366)  
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**

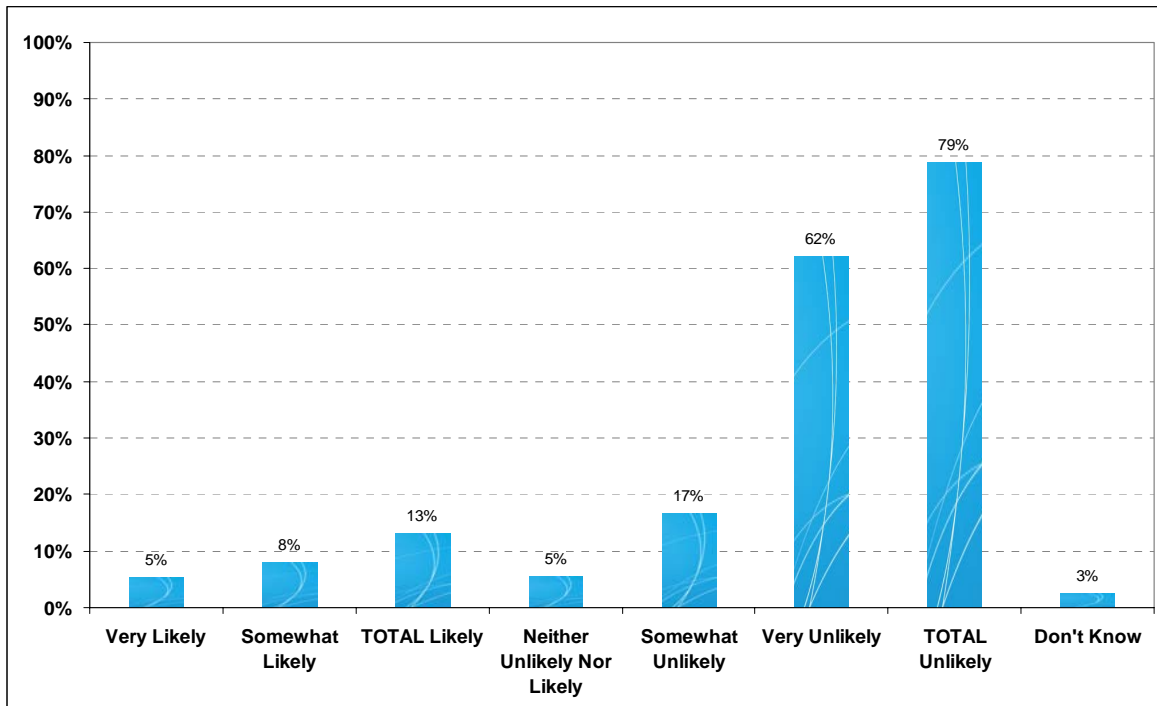


Base: Total Sample (n=464)

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

Figures 28-9 offer a look into the future. A far larger number of respondents (79%) are not planning to change supplier arrangements for their business in the next 12 months compared to those who are (13%). The same pattern was obtained for plans to switch electricity companies (82% vs. 10%).

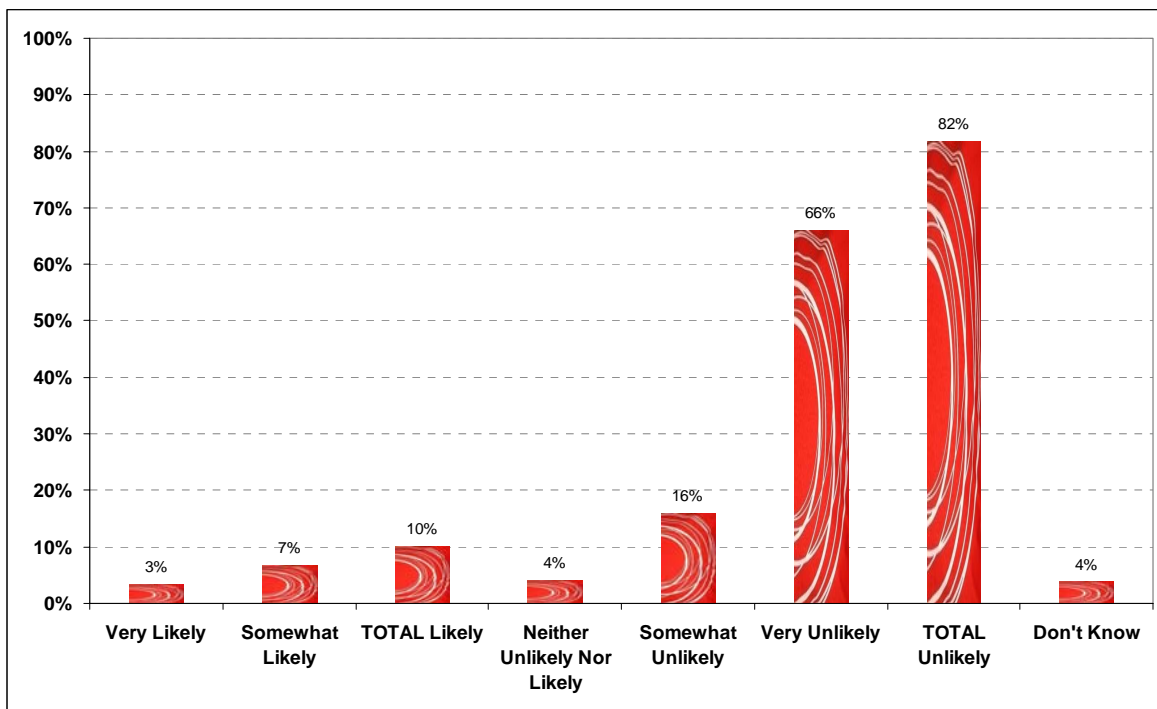
**Figure 28: Likelihood of Changing Supply Arrangements in Next 12 Months**



Base: Total Sample (n=464)

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**



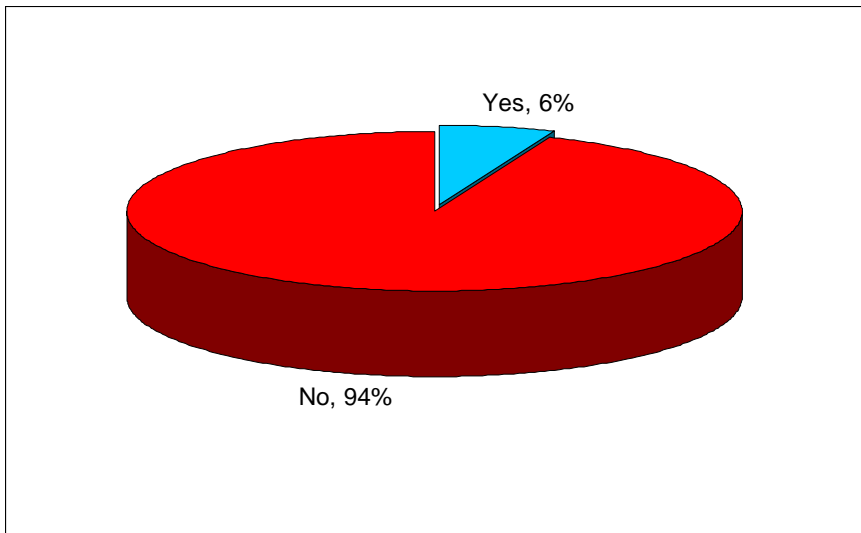
Base: Total Sample (n=464)

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 business 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 6% of the sample indicated they had looked for any information in the last 12 months concerning changing electricity companies or supply arrangements.

For the few who had investigated options (Figure 31), the internet was the most popular information source (46%) followed by the family/friends and the electricity company (each 14%). Table 5 shows that the information was easy to obtain (50% “agree”) and understand (58% “agree”) but information was less satisfactory for ease of comparing offers (32% “agree”). The first two figures but not the third are somewhat improved relative to those in Figure 6 which reflects information provided by electricity companies when they contact the business customers.

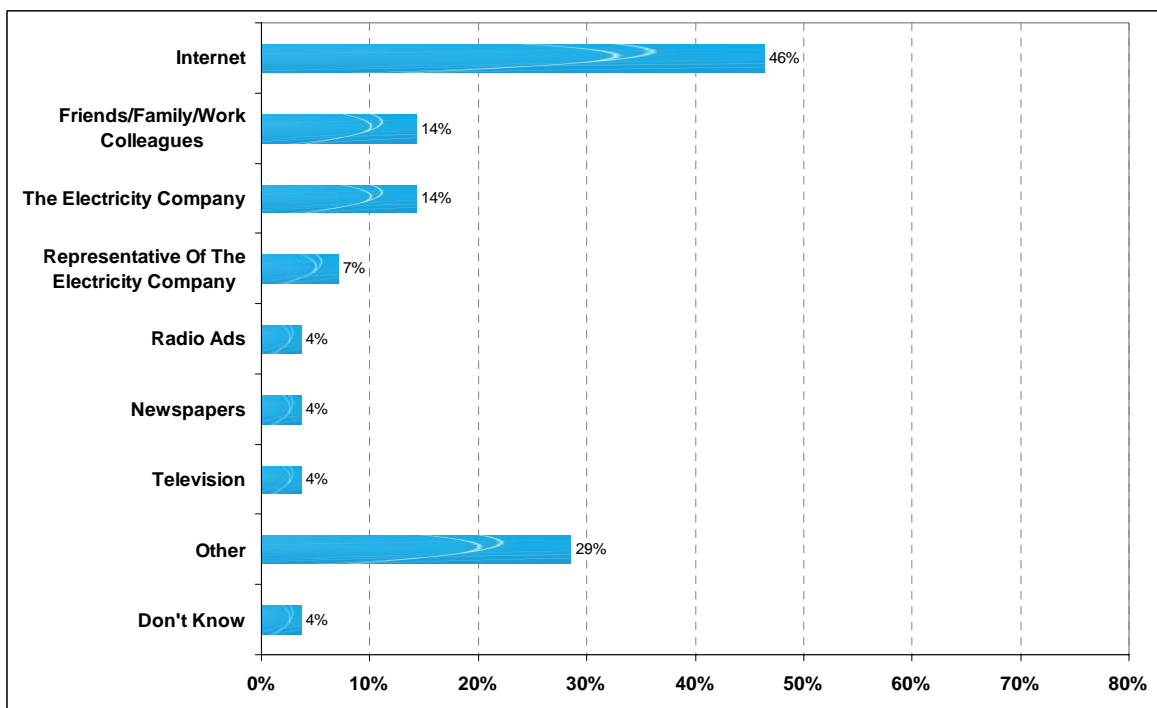
**Figure 30: Looked for Information in Last 12 Months**



Base: Total Sample (n=464)

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 (Caution: Small base)**



Base: Those who looked for information on switching (n=28)

Q27. What were the sources of information?

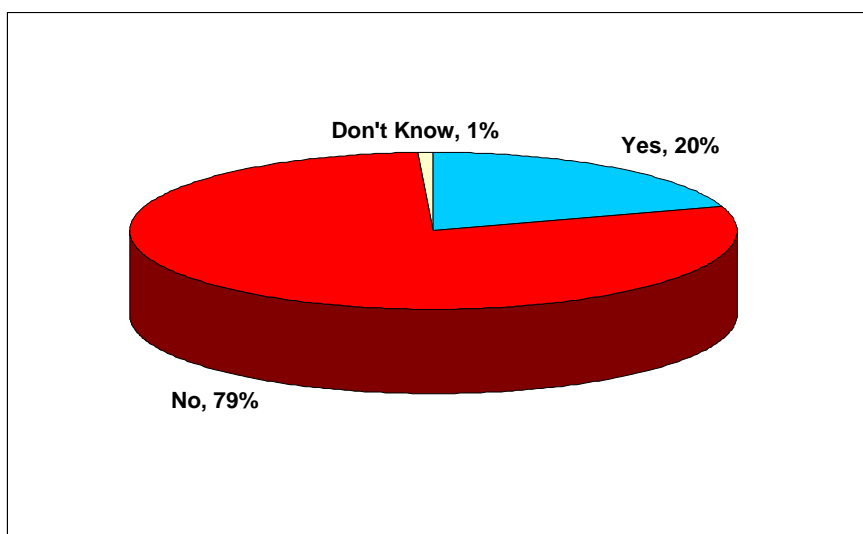
**Table 5: Ratings of Information Obtained (Caution: Small base)**

	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	21%	29%	<b>50%</b>	32%	7%	11%	<b>18%</b>	0%
INFORMATION EASY TO UNDERSTAND	29%	29%	<b>58%</b>	32%	7%	4%	<b>11%</b>	0%
INFORMATION MADE IT EASY TO COMPARE OFFERS	21%	11%	<b>32%</b>	29%	21%	18%	<b>39%</b>	0%
SUFFICIENT INFORMATION TO MAKE INFORMED CHOICE	36%	21%	<b>57%</b>	21%	11%	7%	<b>18%</b>	4%

Base: Those who looked for information on switching (n=28)  
 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 currently appear to be at a level that affects other business expenditures. Figure 32 shows that only one business in five (20%) agrees that energy bills are affecting their ability to meet other business 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 Business Expenditures**



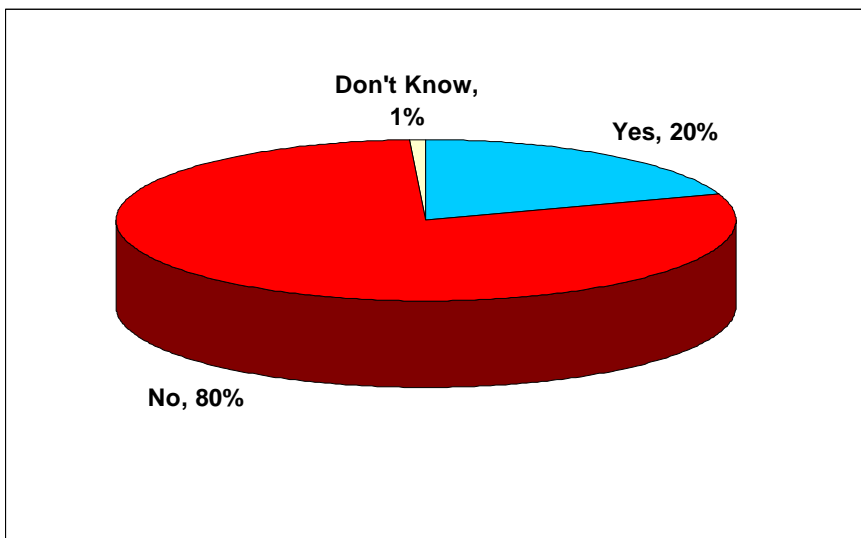
Base: Total Sample (n=464)  
 Q31. Does the amount of money you spend on your energy bills affect your ability to meet other business expenditures?



**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 80% 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 (67% and 75%, respectively were “very” or “somewhat” satisfied).

**Figure 33: Contacted Electricity Company in Past 12 Months**



Base: Total Sample (n=464)

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

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

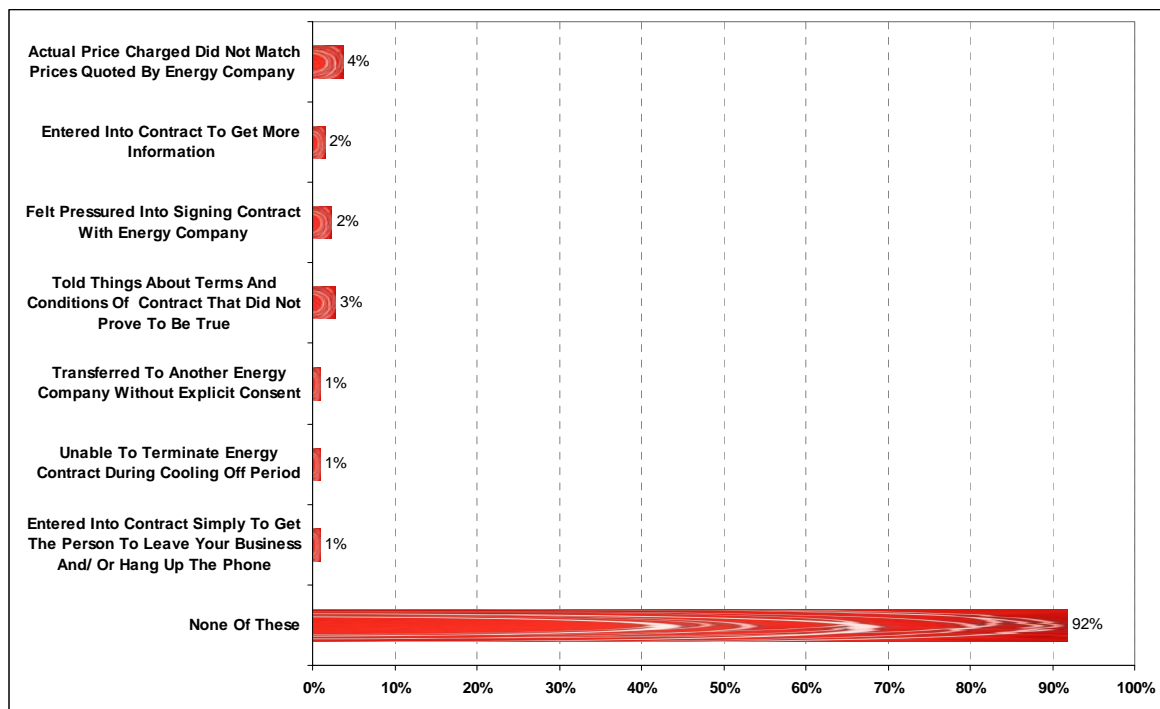
	Very Satisfied	Somewhat Satisfied	TOTAL SATISFIED	Neither	Somewhat Dissatisfied	Very Dissatisfied	TOTAL DISSATISFIED	Don't Know/ Not Sure/ Can't Say
SATISFIED WITH TIMELINES OF RESPONSE	47%	20%	67%	15%	4%	10%	14%	3%
SATISFIED WITH ASSISTANCE PROVIDED	46%	29%	75%	9%	4%	12%	16%	0%

Base: Contacted electricity company in past 12 months (n=91)

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

More than 90% of business respondents (92%) had not encountered any of the seven identified 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 (91%) 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).

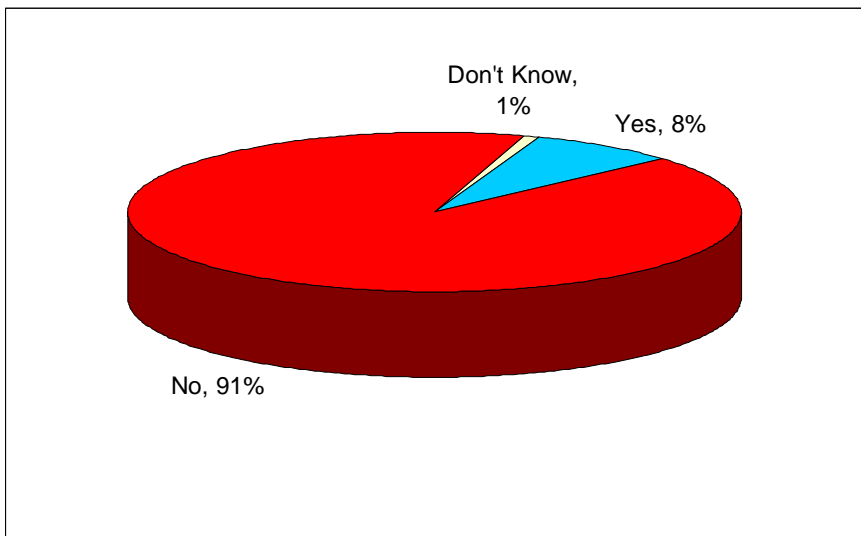
**Figure 34: Experienced any of the Following**



Base: Total sample (n=464)

Q35 Have you experienced any of the following?

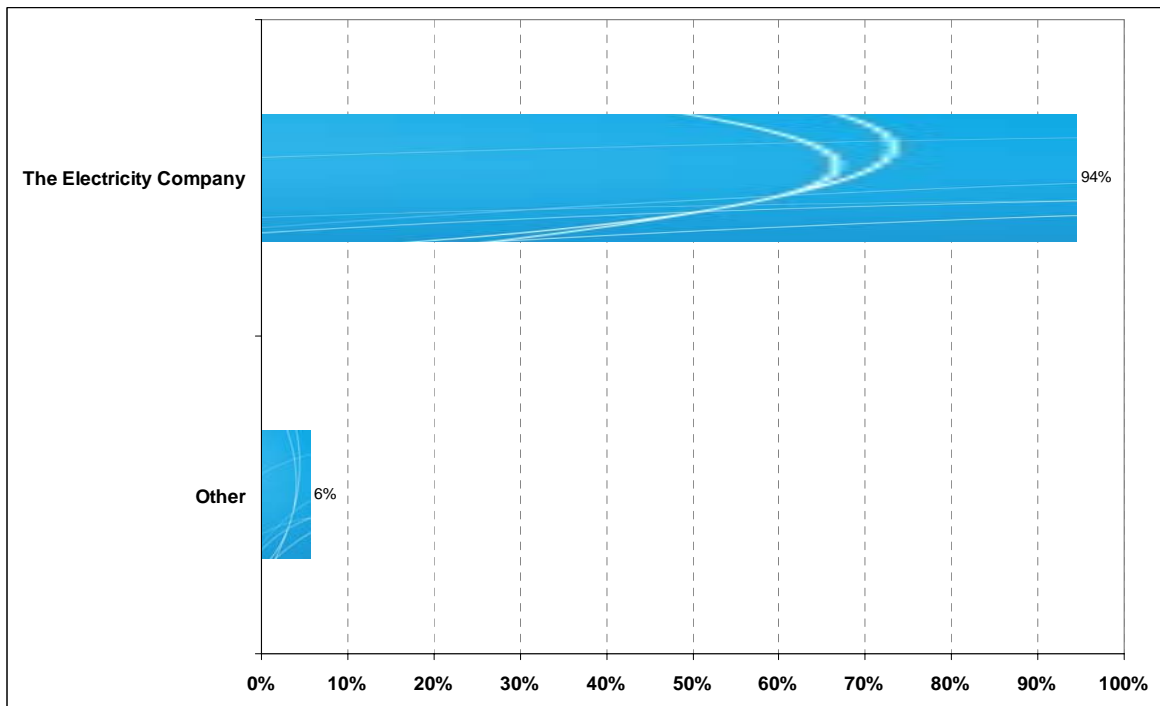
**Figure 35: Ever Complain About Electricity Company?**



Base: Total sample (n=464)

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

**Figure 36: Who Did You Complain To?**

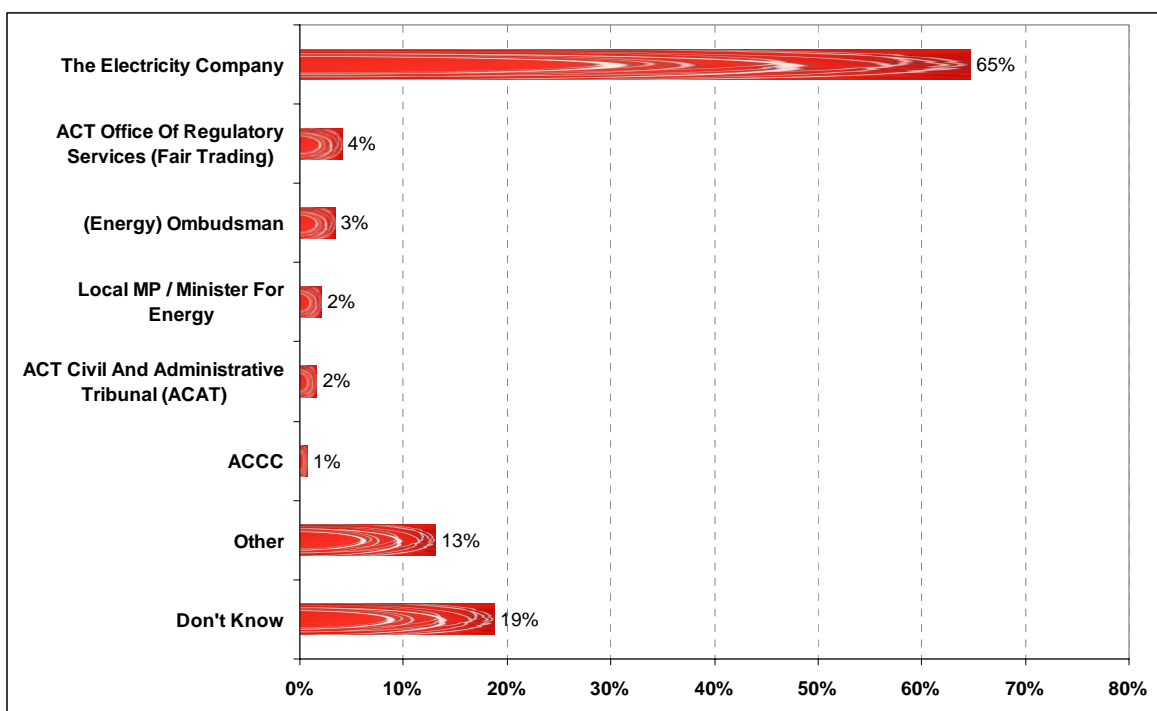


Base: People complaining (n=36)

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. Nearly two in three (65%) cited the electricity company. Independent organisations such as the ombudsman or regulatory agencies (Fair Trading) were mentioned by fewer than 5% (Figure 37). Awareness of the availability of independent sources of assistance was correspondingly low (9%), see Figure 38.

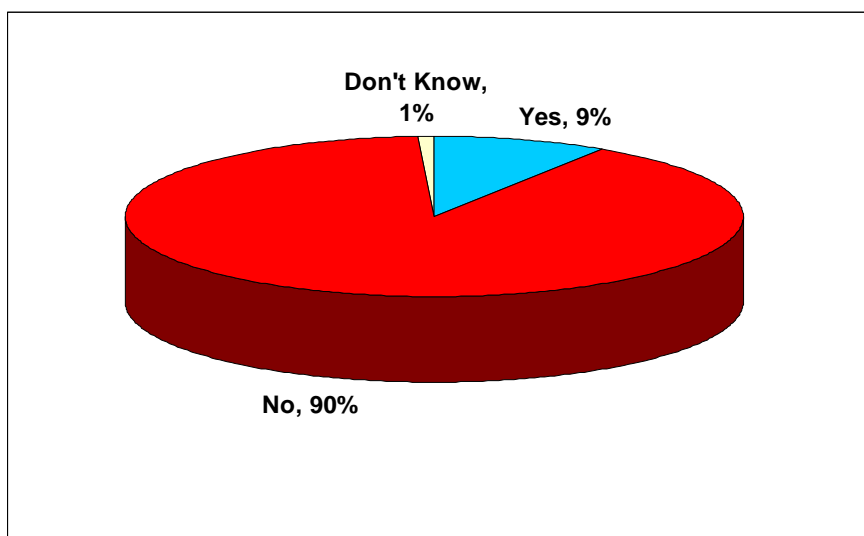
**Figure 37: Who Would You Complain To?**



Base: People who have not complained (n=428)

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=464)

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, Table 7 shows that the current supplier did not receive very high levels of support as the place to go for information on feed in tariffs (52%), energy efficiency (50%) or new energy efficient appliances (31%).

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

	Agree Strongly	Agree Somewhat	TOTAL AGREE	Neither/Not	Disagree Somewhat	Disagree Strongly	TOTAL DISAGREE	Don't Know/Not Sure/Can't Say
PURCHASING A NEW ENERGY APPLIANCE	17%	14%	31%	14%	23%	28%	51%	3%
IMPROVING MY ENERGY EFFICIENCY AND DECREASING MY ENERGY USE	23%	27%	50%	18%	16%	13%	29%	3%
FEED-IN TARIFFS	26%	26%	52%	13%	13%	12%	25%	10%

Base: Total Sample (n=464)

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

## 6. CONCLUSION

To what extent do the actions and attitudes of business users of electricity in the ACT support the notion that there is a competitive 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 survey of 464 people representing small-scale users of electricity for business purposes in the ACT.

- **Independent rivalry within the market** – A majority of business people surveyed were aware that they could choose among electricity suppliers. However 42% were still not aware or not sure 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 business people could not name a supplier other than the one they use and nearly 90% use ActewAGL.
- **The exercise of market choice by customers** – Most people report no company approached their business 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. Those who switched supply arrangements cited green energy and bundling 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 business 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.

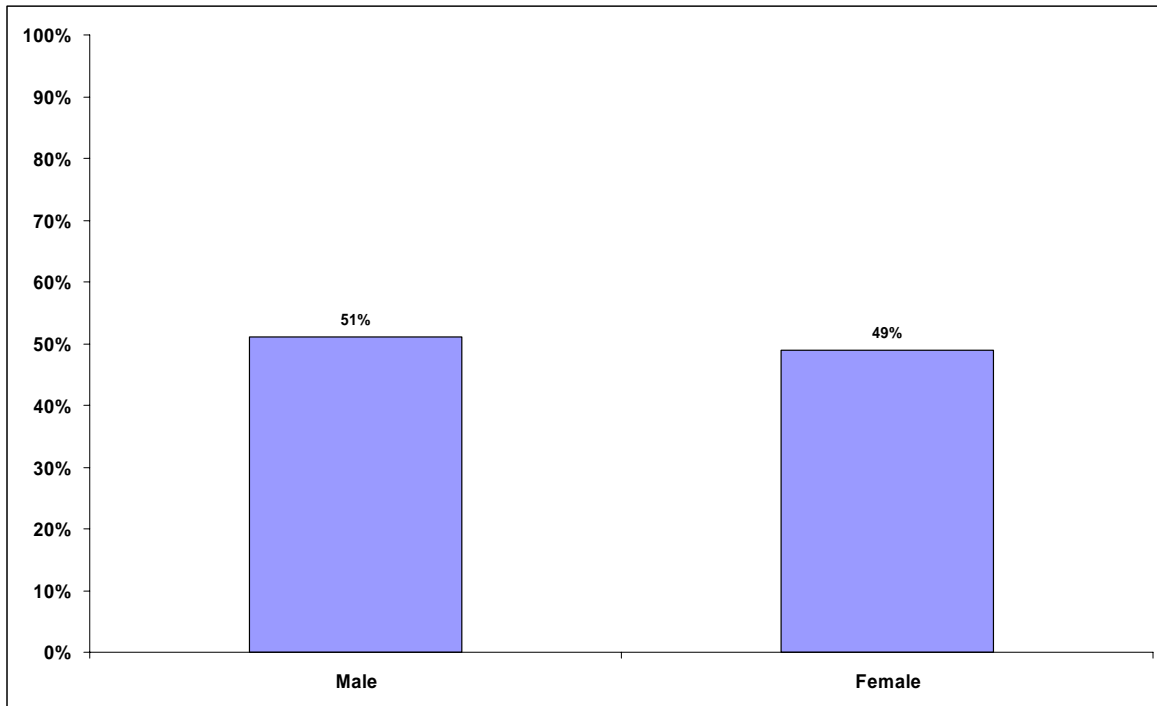
On balance, it does not appear that a vigorous competitive marketplace for electricity exists in the ACT for businesses at present. The satisfaction with ActewAGL and the low involvement in the category may be large contributing factors to this state of affairs.

**7. DEMOGRAPHICS**

**7.1 General Demographics of Sample**

The sample was well balanced for males and females.

**Figure 39: Males and Females in Sample**



About one half of the businesses identified themselves as in retail, manufacturing, or hospitality categories (47%, see Table 8).

**Table 8: Type of Business**

Retail	26%
Manufacturing	11%
Wholesale	3%
Finance	3%
Hospitality	10%
Transport	4%
Communications	8%
Other	34%*
None	1%

Base: All respondents (n=464)

S2. What type of business are you in?

\*included such answers as Painter, Dance School, Childcare Centre, cleaner, Real Estate, and Party Planner.

**Energy-related Demographics**

Business electricity service was a requirement of the study. Piped natural gas was present in 20% of the businesses as well. Solar at 2% has yet to make significant inroads (Table 9).

**Table 9: Energy Used**

Electricity	100%
Piped Natural Gas	20%
Bottled Gas	8%
Solar	2%
Other	0%

Base: All respondents (n=464)

QS1. For this residence, what type of energy does your business use?

**7.2 Survey Contact Results**

Table 10 below shows that the business survey had an overall response rate of 4.3%.

**Table 10: Business Survey Response Rate**

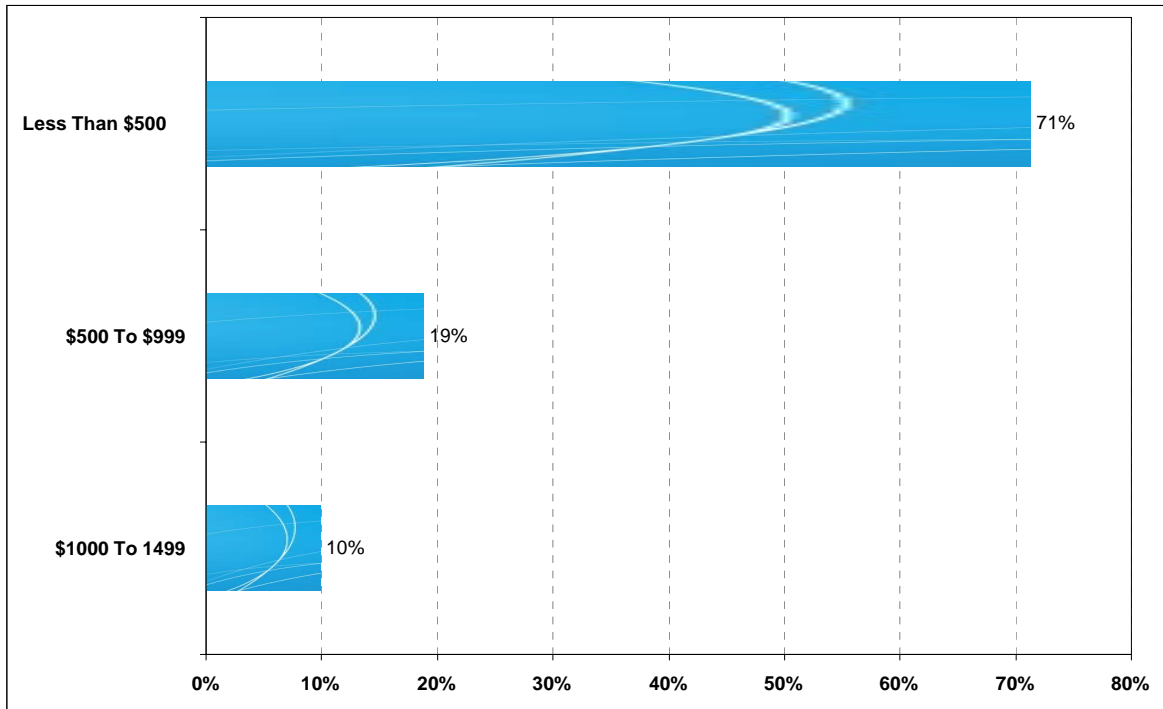
Sample Used	10846
Interviews achieved	464
Response Rate	4.3%



Participants were asked to estimate the average monthly electricity bill for their business. Bills greater than \$1500 per month disqualified the respondent.

Figure 40 showed that the “less than \$500” range was most common (71%).

**Figure 40: Amount Spent On Electricity**



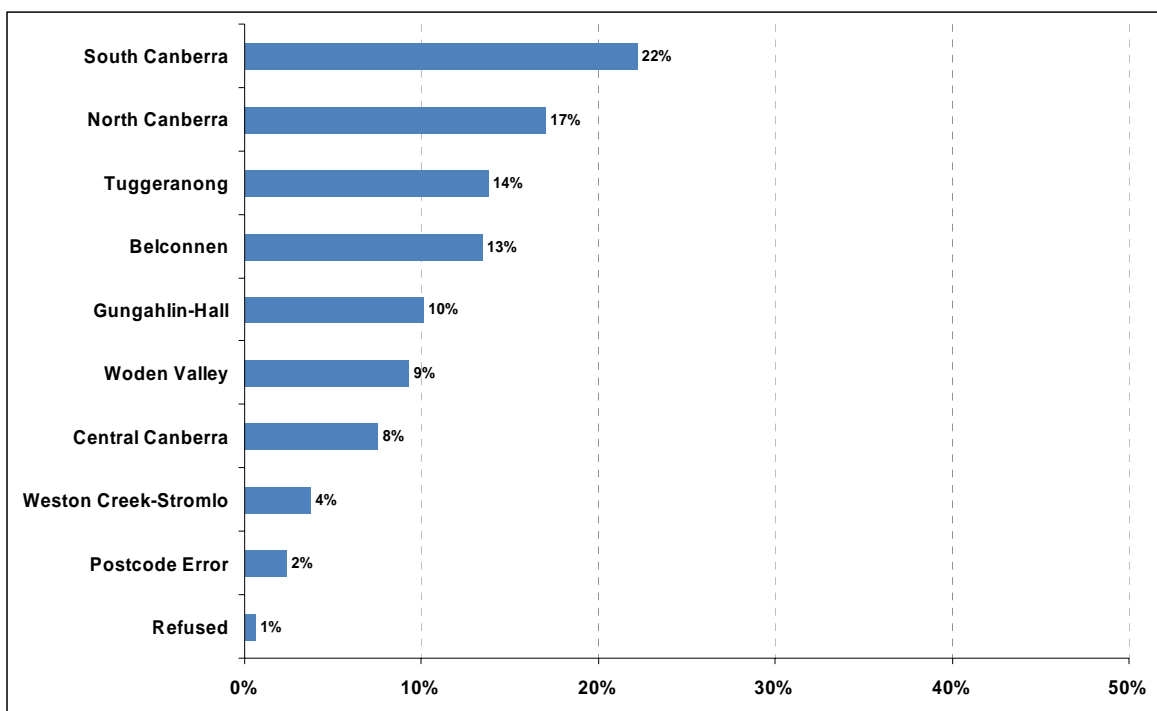
Base: All respondents (n=464)

Q1 How much is your business' average electricity bill per month?

### 7.3 ACT Regions Represented

Business respondents were asked for their postal code. The neighbourhoods/ regions of the ACT were “mapped” from the answers to establish where the businesses were located. South Canberra was best represented (22%), followed by North Canberra (17%). A few people gave invalid or incorrect post codes for their businesses. These were coded as Postcode Errors (2%).

**Figure 41: Business Locations**



Base: All respondents (n=464)

A8. Can I please have your postcode?

## **8. APPENDICES**

### **8.1 Recruitment Screener and Survey**

#### **EFFECTIVENESS OF COMPETITION IN ELECTRICITY RETAIL MARKET (ACT) - BUSINESS SURVEY**

Good [Morning/ Afternoon/ Evening]. My name is (SAY NAME) from Roy Morgan Research. May I please speak with a person in the business 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 business 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](http://www.roymorgan.com)

IF NECESSARY: You can go to the website [www.privacy.gov.au](http://www.privacy.gov.au) for further information.

[Multiple] {Spread:20 Random}

S1. What types of energy does your business 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  
Openend (DO NOT READ OUT) OTHER (SPECIFY)

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

99 Fixed  
Single (DO NOT READ OUT) REFUSED

IF CODE 1 NOT SELECTED ON S1 SAY

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

ENDIF

ASK EVERYONE

CODES IN S2 WILL BE RANDOMISED

[Single] {Random}

S2. What type of Business are you in?

READ OUT

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

- 1 Retail
- 2 Manufacturing
- 3 Wholesale
- 4 Finance
- 5 Hospitality (accommodation, pubs, cafes & restaurants)
- 6 Transport
- 7 Communications
- 97 Fixed  
Openend (DO NOT READ OUT) OTHER (SPECIFY)
- 98 Fixed  
Single (DO NOT READ OUT) NONE OF THESE

[Single]

Q1. How much is your business' average electricity bill per month.

READ OUT

- 1 Less than \$500 per month
- 2 \$500 to \$999 per month
- 3 \$1000 to 1499 per month
- 4 \$1500 to 1999 per month
- 5 \$2000 to 2499 per month
- 6 \$2500 or more per month
- 98 Fixed  
Single (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY
- 99 Fixed  
Single (DO NOT READ OUT) REFUSED

IF MONTHLY BILL IS GREATER THAN \$1500 OR CS/REFUSED (CODE 4 TO 6 OR 98 OR 99 ON Q1) SAY:

Thanks very much for your time. We are looking for businesses of a certain size.

ENDIF

ASK EVERYONE

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 business?

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    OTHER (PLEASE SPECIFY)  
      Openend
- 98   Fixed    DON'T KNOW/NOT SURE/CAN'T SAY

[Multiple] {Spread:20 }

Q6. Which companies do you think you could buy electricity from? 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<br>Openend | OTHER (PLEASE SPECIFY)        |
| 98 | Fixed<br>Single  | DON'T KNOW/NOT SURE/CAN'T SAY |

[Single]

Q7. Have ANY electricity companies approached your business 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 HAD BEEN APPROACHED AND OFFERED TO SELL ELECTRICITY (CODE 1 ON Q7),  
ASK :



[Quantity] {Min: 0, Max: 52, Default Value:51Refusal Code:52}

Q7a. How many times has your business been approached in the past 12 months?  
IF CAN'T SAY, ESC D.  
IF REFUSES, ESC \.

[Multiple] {Spread:20 }

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 Openend OTHER (PLEASE SPECIFY)
- 98 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 :

Q8A1 - Q8A4 WILL BE DISPLAY IN RANDOM ORDER

[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

ASK EVERYONE

[Single]

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

DO NOT READ OUT

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

IF APPROACHED ANY ELECTRICITY COMPANY OR COMPANIES (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 the location of your business?
- 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 HAS BEEN APPROACHED OR APPROACHING ANY ELECTRICITY  
COMPANY/COMPANIES ( CODE 1 IN Q7 OR Q9), ASK:

CODES IN Q12 WILL BE ROTATED

[Multiple] { 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 REFUSE TO SELL ELECTRICITY (CODE 1 IN Q12), ASK:

[Multiple]

Q12a. Why did the company refuse to sell your business electricity?

IF OTHER, HIGHLIGHT OTHER AND TYPE IN RESPONSE

97 Openend OTHER (PLEASE SPECIFY)

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

ENDIF

ENDIF

ASK EVERYONE

[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 SWITCHED ELECTRICITY COMPANIES (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           (DO NOT READ OUT) DON'T KNOW/NOT SURE/CAN'T SAY/HAVEN'T TAKEN OUT A CONTRACT

[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 THE SWITCHING PROCESS DIDN'T GO SMOOTHLY (CODE 2 IN Q15C)ASK:

[Single]

Q15c1. Why did the switching process not go smoothly?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

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 OTHER  
SERVICES SUCH AS INTERNET 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 your business moved locations
- 2 or because of another reason unrelated to moving business location
- 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 DISSATISFIED (CODE 4 OR 5 IN Q18), ASK:

[Multiple] {Spread:20 }

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

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

97 Openend OTHER (PLEASE SPECIFY)

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

ENDIF

IF SATISFIED (CODE 1 OR 2 IN Q18), ASK:

[Multiple] {Spread:20 }

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

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

97 Openend OTHER (PLEASE SPECIFY)

98 Single (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 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

- 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 CHANGED THE WAY ELECTRICITY COMPANY SELLS ELECTRICITY  
(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 OTHER SERVICES SUCH AS INTERNET 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 your business moved locations
- 2 or because of another reason unrelated to moving business location
- 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 DISSATISFIED (CODE 4 OR 5 IN Q23), ASK

[Multiple] {Spread:20 }



Q23a. Why were you dissatisfied?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

97 Openend OTHER (PLEASE SPECIFY)

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

ENDIF

IF SATISFIED (CODE 1 OR 2 IN Q23), ASK:

[Multiple] {Spread:20 }

Q23b. Why were you satisfied?

INTERVIEWER NOTE: TYPE IN RESPONSE IN THE BOX BELOW

97 Openend OTHER (PLEASE SPECIFY)

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

ENDIF

ENDIF

IF CODE 1 IN Q21

[Multiple] {Spread:20 }

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

DO NOT READ OUT

- 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 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 |       | 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          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          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

[Multiple]

Q27. What were the sources of the information?

DO NOT READ OUT

- 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 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 :

Q27A1 - Q27A4 WILL BE DISPLAY IN RANDOM ORDER

[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 business 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

- 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 business and/ or hang up the phone
- 8 Fixed Single (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 MADE A COMPLAINT (CODE 1 IN Q36), ASK

[Multiple] {Spread:20 }

Q37. Who did you complain to?

DO NOT READ OUT

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

IS CODE 2 OR 98 Q36

[Multiple] {Spread:20 }

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

DO NOT READ OUT

- 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 CONTACTED ELECTRICITY IN THE PAST 12 MONTHS (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/

Q44A1 - Q44A2 WILL BE DISPLAY IN RANDOM ORDER

[Single]

Q44A1. The timeliness of the response

- |   |                                       |
|---|---------------------------------------|
| 1 | 1 - very satisfied                    |
| 2 | 2 - somewhat satisfied                |
| 3 | 3 - either 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 - either satisfied nor dissatisfied |
| 4 | 4 - somewhat dissatisfied             |
| 5 | 5 - Very dissatisfied                 |
| 6 | DON'T KNOW/NOT SURE/CAN'T SAY         |

ENDIF

ASK EVERYONE

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

Q45A - Q45C WILL BE DISPLAY IN RANDOM ORDER

[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 GOVERNMENTS AS AN 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 question just for classification purposes.

[Quantity] {Min: 800, Max: 9999, Default Value:9998Refusal Code:9999}

A8. Can I please have your postcode?

IF CAN'T SAY, ESC D.

IF REFUSES, ESC \.

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 |

END-OF-QUESTIONNAIRE