Statement of Confidentiality and Ownership

All of the analyses, findings, data, and recommendations contained within this report are the exclusive property of The Ohio Electric Utility Institute offices located in Columbus, Ohio.

As required by the Code of Ethics of the National Council on Public Polls and the United States Privacy Act of 1974, The Center for Research and Public Policy maintains the anonymity of respondents to surveys the firm conducts. No information will be released that might, in any way, reveal the identity of the respondent.

Further, all recommendations within this report are made, in CRPP's advisory capacity, to the Ohio Electric Utility Institute. These recommendations may be forwarded to the eight participating utilities.

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INTRODUCTION

The Center for Research and Public Policy (CRPP) is pleased to present the results to a survey of Ohio electricity consumers. The research was designed to provide public input on electric competition in Ohio.

The research was also designed to help measure success and progress of the campaign to inform Ohio electric customers of competition statewide.

The research will also help guide the campaign and provide regular public input over two years.

This research study included a comprehensive series of telephone surveys. Interviews were conducted among the general Ohio consumer population, business leaders, African-Americans and Hispanics.

This report summarizes statistics collected from telephone surveys conducted April 10, 2000 – May 19, 2000 and June 26 – 30, 2000.

Areas for investigation within the telephone surveys included:

- Awareness of deregulation/ competition in Ohio;
- Depth of knowledge of deregulation;
- Awareness of information sources;
- Motivation for market participation;
- Perceptions of competition;
- Rating service provided;
- Views on the environment;
- Enrollment process awareness;
- Marketing development;
- Information access and needs; and
- Demographics.

Section II of this report discusses the Methodology used in the Study while Section III includes Highlights and Recommendations derived from the quantitative business and residential surveys. Section IV is a Summary of Findings for the telephone surveys. Section V contains survey results by each of eight Ohio electric utilities.

Section VI is an Appendix containing survey instruments and composite aggregate data.

2 METHODOLOGY

Using qualitative research design, CRPP completed 3200 interviews with the general population (General Consumer Market - GCM) throughout Ohio – 400 in each of eight electric utility territories. In addition, CRPP completed another 3200 interviews with business leaders (Business Community Market – BCM) throughout Ohio – 400 in each of eight electric utility territories. An additional 400 interviews were conducted among African-Americans (AACM) and 200 interviews statewide among Hispanics (HCM). All telephone interviews were conducted between April 10 – May 19, 2000. An additional statewide survey of 1201 residential consumers was also accomplished June 26 – 30, 2000.

The eight participating electric utilities included: Cincinnati Gas and Electric, The Illuminating Company, Columbus Southern Power, Dayton Power and Light, Monongahela Power Company, Ohio Edison, Ohio Power and Toledo Edison.

Survey input was provided by members of the Public Utilities Commission of Ohio (PUCO), the Ohio Consumers' Counsel, and the Ohio Electric Utility Institute (OEUI).

The telephone sample used in the surveys was generated by Survey Sampling, Inc.

CRPP utilizes a "super random digit sample" which derives a working telephone sample of both listed and unlisted telephone numbers. This method of sample selection eliminates any bias toward only listed phone numbers. Additionally, the process allows randomization of numbers which equalizes the probability of telephone households being included in the sampling frame.

Statewide sample was generated proportional to population contribution statewide.

One survey instrument was used to elicit information from all residents while a similar instrument was employed for interviews among business leaders. Residential respondents qualified if they were eighteen years of age or older, one of the heads of their household, and currently receive a bill from an electric or gas utility on a regular basis. The residential survey was translated into Spanish. Approximately 21% of all interviews among Hispanics were conducted in Spanish.

Business respondents were owners, officers, managers or individuals aware of energy bills.

Training of telephone researchers and a pre-test of the survey instruments occurred on April 9, 2000 and June 23, 2000.

All facets of the consumer research were completed by CRPP's researchers and senior staff. These aspects included: survey and focus group guidebook design, sample design, pre-test, computer programming, fielding, coding, data entry, validation and logic checks, computer analysis, analysis, report writing and presentations.

Statistically, a sample of 1200 completed telephone interviews represents a margin for error of +/-3.0% at a 95% confidence level while surveys of 400 represent margins for error of +/-5.0-% at 95% confidence levels.

In theory, a sample of 1200 Ohio resident consumers would differ no more than +/-3.0% than if all the residents in the designated geographic area were contacted and included in the survey. That is, if random probability sampling procedures were reiterated over and over again, sample results may be expected to approximate the large population values within plus or minus +/-3.0% -- 95 out of 100 times.

Readers of this report should note that any survey is analogous to a snapshot in time and results are only reflective of the time period in which the survey was undertaken. Should concerted public information or relations campaigns be undertaken during or shortly after the fielding of the survey, the results contained herein may be expected to change and should be, therefore, carefully interpreted and extrapolated.

Furthermore, it is important to note that all surveys contain some component of "sampling error". Error that is attributable to systematic bias has been significantly reduced by utilizing strict random probability procedures. This sample was strictly random in that selection of each potential respondent was an independent event, based on known probabilities.

Each qualified household within the State of Ohio had and equal chance for participating in the study. Statistical random error, however, can never be eliminated but may be significantly reduced by increasing sample size.

3 HIGHLIGHTS

On Awareness…

- **Statewide, 38.2% of residential consumers and 53.8% of business consumers report hearing or reading about electric competition in Ohio.**

- **Of these groups, 24.7% of residential consumers and 41.7% of business consumers report being "very aware" of electric competition.**

- **Awareness of electric competition in significantly less among African-Americans and Hispanics -- 26.3% and 26.7% respectively.**

- **Just over one third, 35.6%, of residential respondents believe their local electric distributor is very or somewhat supportive of electric competition. Another 25.8% believe their utility is somewhat or very opposed to deregulation and 38.6% are unsure.**

- **Nearly half of business consumers (45.9%) statewide, believe their own electric distributor is very or somewhat supportive of electric competition. Another 24.5% believe their local electric distributor is somewhat or strongly opposed to deregulation. And, 29.6% are unsure.**

On Knowledge…

- **A small percent of residents (10.3%) and just under one quarter of business leaders surveyed (23.6%) suggest they are very or somewhat aware of the process to follow in selecting an electric supplier.**

- **When respondents who are aware of electric competition are asked a series of true or false questions and respondents who are unaware of electric competition are assigned a "don't know" response, the following knowledge levels result:**

  - **35.3% correctly believe that customers not choosing a new electric supplier will continue to receive electricity from their local electric utility.**

  - **34.0% correctly believe they'll have the ability to compare prices between their local electric utility and new electric suppliers.**
  - **16.8% incorrectly believe that new electricity suppliers will be responsible for repairs of poles and power lines after a power outage. A smaller percent, 11.0% correctly believe this statement is incorrect.**

  - **23.1% incorrectly believe they are first required to notify their local electric utility in order to switch.**

On Perceptions…

- **There exists strong interest in electric competition in Ohio. Among residential consumers, 79.6% suggest they are very or somewhat interested. Among business consumers, 84.8% report being very or somewhat interested.**

On Service…

- **Statewide, as a group, utilities receive positive ratings among residential and business consumers on "reliable service" - 89.1% and 83.6% respectively.**

- **The positive ratings on "overall customer service" for residential and business respondents were 85.8% and 79.5% respectively.**

- **Significantly lower positive ratings were recorded among both residential and business consumers on "price" – 45.1% and 43.1% respectively.**

- **On most measures, utilities typically strive to attain and maintain positive ratings in the high eighties.**

- **Large majorities of residential and business consumers (86.3% and 85.4% respectively) report having great or some confidence that service will continue uninterrupted in a new, competitive market. Still nearly 10.0% of each market segment has little or no confidence that service will continue uninterrupted.**

On the Environment…

- **Impressively, 86.0% of residential and 81.0% of business respondents report being very or somewhat likely to use environmental information in their decision on an electric supplier.**

On the Decision Process…

- **One quarter, 23.4% of residential consumers surveyed have made a decision related to electricity choice. They've made a decision to switch (1.8%), not to switch (11.3%), or not to make a choice yet (10.3%).**

- **A larger percent of business respondents (36.4%) report having made a decision on electricity choice. They have made a decision to switch (3.1%), not to switch (19.7%), or not to make a choice yet (13.6%).**

- **Significant majorities of both consumer (91.7%) and business (90.9%) respondents note that a price-to-compare would be very or somewhat helpful in the decision making process.**

- **While only 5.5% of residential consumers would switch their electricity supplier for 5.0% savings, 84.8% suggest they would switch for 25.0% savings.**

- **Among business consumers, 6.4% would switch to save 5.0% on their electric bill while 76.3% would switch if savings were to reach 20.0%.**

On Market Development…

- **"Lower price" was perceived by both residential consumers (74.2%) and business consumers (76.0%) as the leading advantage to competition.**

- **The leading disadvantages to competition among residential consumers were slamming, marketing calls, higher prices, and lower reliability levels.**

- **Among business leaders, the leading disadvantages were reported to be marketing calls, higher prices, slamming, poorer customer service, and a time consuming process.**

- **The most important factors, when residential consumers shop for an electric supplier, are a "constant and reliable supply of electricity", "customer service", and "price".**

- **The least important factor, among residential consumers, is having suppliers who offer other services and products.**

- **When business leaders shop, the most important factors include: constant and reliable supply of electricity, customer service, and price. Least important factors include: terms of contracts, length of contract, company name recognition, and other services or products.**

On Information…

- **Clearly, consumers – business and residential – will be looking primarily for a <u>list of suppliers</u> and respective <u>price offers</u> when competition begins.**

- **Only 4.0% suggested being aware that a web site will be available to Ohio consumers interested in electric competition information.**

- **Further, 9.8% suggested they were aware a toll free number would be available.**

On Crosstabulations…

- **Older, high educated, higher income, and male residents and those with access to the internet are significantly more aware of electricity competition in Ohio.**

- **Suburban and rural, male and older residents are most likely to report their own local utility is supportive of electric competition in Ohio.**

- **Interest in electric competition is highest among respondents under 65 years of age, those college educated, those with higher incomes and males.**

- **Positive ratings for local electric utilities are highest among older residents and those with higher incomes.**

- **Interestingly, urban, suburban, and rural respondents provide very similar responses across all questions presented.**

- **While decision-making results are very similar across most demographic groups, seniors are significantly more likely to report they've made a decision not to switch (20.6%) than those under 35 years of age (5.5%).**

- **Males are significantly more likely to switch electric suppliers (35.5%) at 10% savings than females (24.8%).**

- **Overall, larger companies in Ohio (50 or more employees) are significantly more aware of electricity competition issues than smaller companies.**

- **And, those companies with monthly electric bills of $251 or more are also more likely to be aware and engaged in choice issues.**

- **Larger companies with higher monthly bills are also most likely to provide higher positive ratings for their own local electric distributor on reliability, overall customer service, and price.**

Recommendations…

- **The campaign should have outreach efforts which target African-American and Hispanic residents statewide. Currently each market segment holds electric competition awareness levels of 12.0% less than the general consumer market.**

- **The campaign should work to correct existing confusion in the following areas:**
  - **The distinction between supply and distribution;**
  - **Consumers have a number of rights and responsibilities;**
  - **Repairs will remain the responsibility of the local electric utility; and**
  - **Residents will not be required to call their incumbent local electric utility in order to switch.**

- **The campaign should include some notification for customers on what kinds of environmental information will be provided by the local electric utility and suppliers.**

- **A price-to-compare index for customers should be considered. A large majority, 91.7%, suggest such a price-to-compare would be very or somewhat helpful in decision making.**

- **The campaign and local utilities should enhance their efforts supporting and informing residents about electric competition. Only a third of respondents (residential) believe their local utility supports deregulation.**

- **Seniors should be targeted by the campaign and helped to understand the benefits from a deregulated market. Currently 20.6% of seniors have decided not to switch compared to 5.5% among those younger than 35 years of age and 11.3% on a composite basis.**

- **A uniform statewide Consumer Guide should be developed by the campaign for distribution to those calling the toll free call center number and the local electric utilities for information. Such a guide would enable consistent measurement on awareness and knowledge. The guide would minimally include information on how to shop and consumer rights and responsibilities.**

- **A sample of consumers calling the call center should be consulted on "customer satisfaction". Together with an Consumer Guide, the call center is "front line". Consumers dissatisfied with either will negatively impact consumer confidence and deregulation success.**

- **The campaign should be consistent with its use of terms identifying supply and distribution. The terms used in this current measurement research were: local electric utility and electricity supplier.**

4 SUMMARY OF FINDINGS

Two random sub-samples were drawn to complete the 7000 interviews. One draw was used to conduct 1200 business and 1200 residential surveys statewide. A second draw was used to complete 800 surveys (400 residential, 400 business) in each of eight electric utility territories. The results to this large sample is presented in Section VI – Utility Specific Results.

Readers are reminded that this section summarizes the statistics collected from a random statewide telephone survey among 1200 Ohio resident consumers, 1200 business consumers, 400 African-American and 200 Hispanic residential consumers. The survey was conducted on behalf of the Ohio Electric Utility Institute and the Ohio Public Utilities Commission.

The text throughout this section as well as the second column of many tables refer to and presents results from the General Consumer Market (GCM) – the 1200 interviews.

The third column of many tables presents results for the Business Consumer Market (BCM) – 1200 interviews.

The fourth and fifth columns contain results for the African-American (AACM) and Hispanic (HCM) consumer markets statewide respectively.

Crosstabulation tables are presented at the end of this section which present statewide results by such demographics as age, income, gender, education, type of community, and internet access.

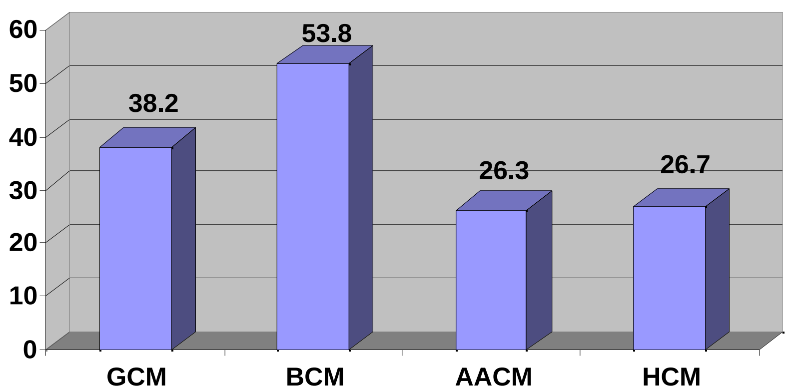
Awareness of Electric Competition

All respondents were asked if they had heard, ready or seen anything about competition or deregulation of electric suppliers in Ohio.

Among residential consumers, 38.2% suggested they had while 53.8% of business respondents mentioned they had.

The following table depicts the results as collected.

Awareness: April 2000	**GCM**	**BCM**	**AACM**	**HCM**
Yes	38.2%	53.8%	26.3%	26.7%



Respondents who reported being aware of deregulation or competition, were asked how aware they were. The following table presents the results for those very aware, somewhat aware and the cumulative totals.

Depth of Awareness	**GCM**	**BCM**	**AACM**	**HCM**
Very Aware	24.7%	41.7%	28.7%	17.2%
Somewhat Aware	61.8	47.9	62.2	62.1
Cumulative	86.5	89.6	91.1	93.1

Researchers asked respondents how supportive of deregulation or competition their own electric utility was.

Just over one third, 35.6% of all residents surveys suggested their utility was very (8.1%) or somewhat (27.5%) supportive of electric competition in Ohio.

The cumulative totals, by market segment, for very and somewhat supportive are presented.

Support Level	**GCM**	**BCM**	**AACM**	**HCM**
Very and Somewhat Supportive	35.6%	45.9%	31.1%	39.7%
Very and Somewhat Opposed	25.8	24.5	25.9	20.6
Don't know	38.6	29.6	43.0	39.7

Knowledge

Researchers measured knowledge of the "process to follow" when selecting an electric supplier. All respondents were asked how aware they would say they are of the process to follow in selecting an electric supplier.

A small number of respondents reported being very aware (10.3%). The following table presents those respondents who report being very aware of the selection process by market segment.

Process Awareness	GCM	BCM	AACM	HCM
Very Aware	10.3%	23.6	14.0%	13.8%

In a June survey, 1,201 respondents were asked if they had "read, heard, or seen anything about deregulation or competition in Ohio" as a screening question. Respondents who had answered "yes" were then asked a series of 12 true or false statements. Respondents who had responded "no" were assigned a "don't know" for each of the 12 statements.

The following table presents the results as collected. Accurate responses are presented in bold.

True or False Statements (1,201 Respondents)	True	False	DK
With the introduction of electric competition, electricity suppliers will no longer need to be certified (reviewed and approved for service) by the Public Utilities Commission of Ohio.	4.0	**21.1**	74.9
With the introduction of competition, you will call your local electric utility to report a power outage.	**22.1**	3.5	74.4
You will be able to choose a new electricity supplier that will sell you the electricity you use, but that electricity will continue to be delivered to your home by your current local electric utility.	**26.5**	3.0	70.5
There will be fewer consumer protection laws to protect consumers from market abuses such as “slamming” (switching you to another electric provider without your permission).	12.5	**13.5**	74.0
Customers who do not choose a new electric supplier will continue to receive electricity from their local electric utility.	**35.3**	2.0	62.7
With the introduction of competition, the new electricity suppliers will be responsible for repairs of poles and power lines after a power outage.	16.8	**11.0**	72.2
The new electricity supplier will be able to disconnect a customer’s electric service for non-payment during periods of extreme heat and cold weather.	7.1	**19.8**	73.1
In order to switch to one of the new electricity suppliers, you will be required to first notify your local electric utility.	23.1	**8.0**	68.9
When electric competition begins, you will have the ability to compare prices between your local electric utility and new electric suppliers.	**34.0**	2.0	64.0
Electric supplier will not be required to provide you information on the environmental characteristics of the energy sources (coal, nuclear, wind, water, etc.) they use to generate your electricity.	8.0	**17.8**	74.2
The 5% rate reduction residential consumers will see starting January 1, 2001 applies only to the generation/supply portion of your bill.	**9.4**	3.2	87.4

Perceptions

Just under a third of all residential consumers (29.5%) report being very interested in electric competition in Ohio. A total of 79.6% report being very or somewhat interested in competition. A greater number of business respondents report being very interested (44.7%) in competition.

The following table presents the results for those reporting very interested, somewhat interested and the cumulative totals for each market segment.

Interest Level	GCM	BCM	AACM	HCM
Very Interested	29.5%	44.7%	33.7%	26.7%
Somewhat Interested	50.1	40.1	47.1	53.0
Cumulative	79.6	84.8	80.7	79.7

Service

All respondents were asked to rate satisfaction with their own local distribution utility on three characteristics. Respondents used a scale of one to ten were one was very satisfied and ten was very dissatisfied.

The following presents the cumulative totals for positive satisfaction ratings of one through four and negative satisfaction ratings of seven though ten.

<u>Positive Ratings</u>

Characteristics	GCM Positive	BCM Positive	AACM Positive	HCM Positive
Reliable Service	89.1%	83.6%	87.4%	87.1%
Overall Customer Service	85.8	79.5	83.9	86.2
Price	45.1	43.1	46.9	53.5

<u>Negative Ratings</u>

Characteristics	GCM Negative	BCM Negative	AACM Negative	HCM Negative
Reliable Service	3.7%	8.0%	3.2%	5.1%
Overall Customer Service	4.6	9.1	5.3	6.0
Price	22.0	22.6	23.7	17.9

Just over one third of all residential respondents (34.8%) suggested they have great confidence that electric service will be uninterrupted in a new, competitive market. Another 51.5% note they have some confidence and 9.0% report very little or no confidence.

The following table presents the cumulative totals for great and some confidence by each market segment.

Degree of Confidence	GCM	BCM	AACM	HCM
Great and Some Confidence	86.3%	85.4%	85.8%	86.6%

Environment

Researchers read the following to respondents: "In a competitive electric market, many electric suppliers from within and outside Ohio will be selling electricity to residents (businesses). Suppliers produce energy by using different resources such as wind, nuclear, coal, bio-mass, water and solar. The resources used have different impacts on the environment. If your were shopping for a new electric supplier in the future, how likely would you be to use environmental information in your decision?"

A large majority of residents, 86.0%, suggested they would be very (41.6%) or somewhat likely (44.4%) to use such environmental information in their decision. Results by market are presented here.

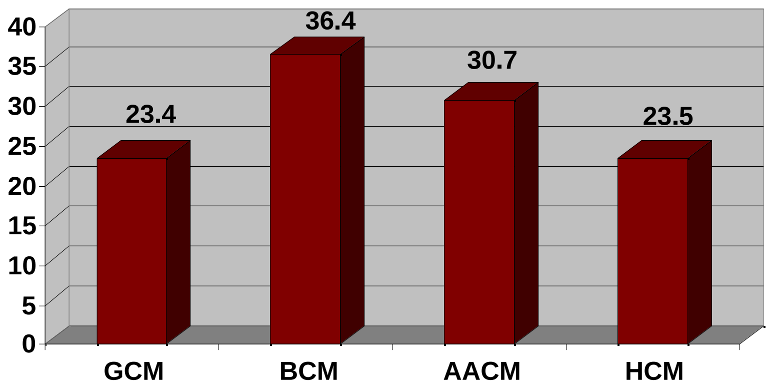
Likelihood for Use	GCM	BCM	AACM	HCM
Very and Somewhat Likely	86.0%	81.0%	88.1%	89.9%

Decision Process

In an effort to measure decision making over time, researchers asked if respondents have made a decision to switch electricity suppliers, not to switch, to not make a choice yet or to determine if they are waiting on more information before making a decision.

The following presents results as collected.

Decision	GCM	BCM	AACM	HCM
Made a decision to switch to another electric supplier	1.8%	3.1%	2.7%	4.1%
Made a decision not to switch to another supplier	11.3	19.7	16.3	13.4
Made a decision not to make a choice yet	10.3	13.6	11.7	6.0
Waiting for more information	75.7	61.0	67.5	75.1



Researchers explained that Ohio residents and businesses who begin to shop around for a new electric supplier may be able to review a price to compare – the price charged per kilowatt hour by each supplier. All respondents were asked how helpful this price to compare would be during shopping.

A large majority of residents (91.7%) considered such a price to compare very (63.1%) or somewhat (28.4%) helpful.

The following table presents the results by market segment.

Helpfulness	GCM	BCM	AACM	HCM
Very and somewhat helpful	91.7%	90.9%	90.1%	89.9%

Only 5.5% of residential respondents report they would switch electricity suppliers for 5.0% savings off their bill after removing “don’t know” and “depends” respondents from the data.

At 10.0% savings, 36.68% (cumulative) noted they would likely switch.

At 15.0% savings, 48.7% (cumulative) noted they would be inclined to switch.

Further, at 25% savings, 84.8% (cumulative) suggested they would switch, and at 50% savings 98.9% (cumulative) said they would switch electric suppliers.

Among businesses, 6.4% would switch at 5.0% savings. A total of 35.38% would switch for a 10.0% savings off their bill.

Further, 76.3% (cumulative) would switch at 20.0% savings.

Market Development

Researchers asked respondents to report the advantages each saw in electric competition or choice.

Three quarters of resident respondents (74.2%) cited "price" as an advantage. Others and the percent mentioned are included in the following table.

Advantages	GCM	BCM	AACM	HCM
Lower Price	74.2%	76.0%	59.5%	62.2%
Comprehensive services / value added services / bundled services	23.2	24.5	27.6	24.9
New products / services	21.2	25.3	22.6	19.4
Environment / conservation	27.3	27.7	23.7	20.3
Competition	43.3	44.1	52.1	43.8
Improved customer service	32.2	33.6	23.3	22.1

Researchers also asked respondents to report disadvantages. The results follow.

Disadvantages	GCM	BCM	AACM	HCM
Higher prices	32.3%	36.8%	23.3%	19.4%
Marketing calls / visits / mailings	32.2	39.0	30.0	26.3
Harm to the environment	22.3	25.2	19.8	18.4
Slamming / unauthorized switching	34.4	44.3	19.3	19.4
Reliability suffers	30.7	29.3	26.3	24.0
Poorer customer service	29.3	32.3	22.8	18.0
Time consuming process	20.1	30.8	15.2	14.7
Diversifying services causes problems	22.3	22.3	17.3	18.4
Difficulty in comparing prices	22.5	25.3	20.6	15.7

Residential respondents were asked how likely they would be to become part of a group, if available, in order to shop with large numbers of potential customers for a competitive electric supplier.

While a smaller group of respondents (19.6%) suggested they would be very likely, together with those indicating somewhat likely the cumulative total was 63.2%.

The following table presents the results as collected by market segments.

Likelihood of Joining Group	GCM	BCM	AACM	HCM
Very and Somewhat Likely	63.2%	72.1%	73.5%	76.0%

Nine different factors were presented to respondents as ones they may consider in their decision when shopping for an electric supplier.

Respondents were asked to use a scale of one to ten to identify how important each would be in their decision process. One indicated very important while ten meant the factor was not at all important.

The following table presents the factors and the percent indicating each was very important (cumulative ratings of one through four).

Factors	GCM	BCM	AACM	HCM
Constant and reliable supply of electricity	98.1%	93.0%	97.9%	98.6%
Customer service	96.2	89.8	96.3	98.2
Price	95.4	88.5	95.9	97.2
Reputation of company	89.4	79.1	93.0	90.8
Environmental characteristics of the electricity produced	84.6	74.8	88.9	88.5
Terms of contract	80.8	68.3	84.6	76.0
Length of contract	78.8	68.7	83.1	74.7
Name recognition of company	74.8	65.3	80.2	72.8
Supplier offers other services and products	50.2	52.1	55.4	51.6

Information

Researchers explained to respondents that the public campaign to educate Ohio consumers about electric choice will be titled “Ohio Electric Choice”.

Each was asked if, prior to the researchers call, they were you aware of the Ohio Electric Choice Web Site that will be available to Ohio consumers interested in electric competition information.

A small percent, 4.0%, suggested they were aware of the Web Site.

Respondents were also asked, if prior to the researchers call they were aware that a toll free Ohio Electric Choice answer center will be available for Ohio consumers to call with questions on electric competition.

A small percent, 9.8%, suggested they were aware a toll free number would be available.

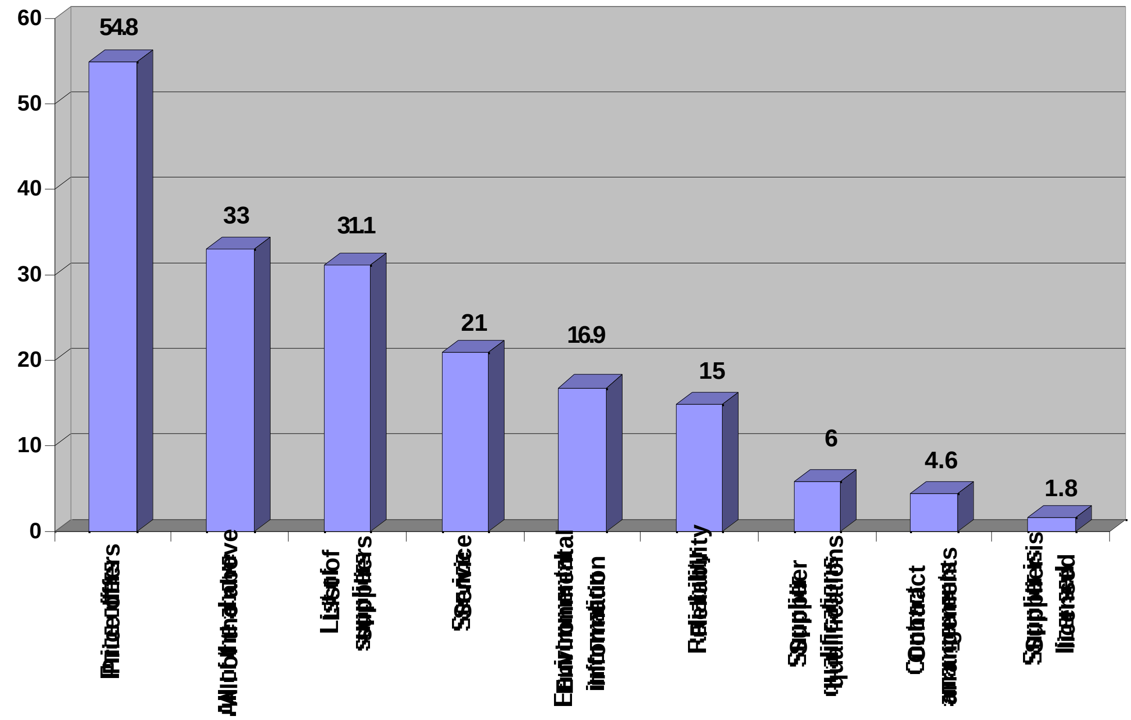
Respondents were asked where they would likely go to learn about or how they would like to receive information about electric competition in Ohio. The following table presents the results. Multiple responses, from each respondent, were accepted.

Source	GCM	BCM	AACM	HCM
TV news	33.9%	28.4%	45.7%	36.4%
TV advertising	17.0	13.1	29.4	24.4
Radio news	11.8	11.8	8.6	6.5
Radio advertising	6.3	5.4	5.3	4.6
Newspaper stories	21.6	15.0	24.7	27.6
Newspaper ads	14.8	18.5	9.3	11.5
Billboards	3.5	2.9	3.3	.9
Brochures	10.9	6.9	12.3	12.0
Newspaper inserts	3.9	4.2	2.1	3.2
Bill inserts	10.2	11.2	7.2	8.8
Fairs / events	.8	.5	1.4	.9
Friends / neighbors / relatives	4.8	1.7	4.1	4.1
Co-workers	1.7	.7	1.2	.9
Employer / school	.6	.5	.8	--
Utility Company	4.3	5.8	3.7	2.8
Mailings / direct mail	36.6	38.4	35.4	39.2
Government agency	3.1	12.3	3.3	2.3

Over half of all residential respondents (54.8%) report that they need specific price offers in order to make an informed decision on electricity choice. List is followed by a list of suppliers (31.3%).

The following table presents the information needed by respondents in order to make an informed decision on electricity choice.

Information Needed	GCM	BCM	AACM	HCM
List of suppliers	31.1%	30.4%	26.3%	28.1%
Price offers	54.8	46.9	48.1	56.2
Environmental information	16.9	16.4	13.8	14.7
Service	21.0	18.8	23.3	22.6
Reliability	15.0	9.6	12.5	16.1
Contract arrangements	4.6	3.3	3.7	4.6
Supplier qualifications	6.0	6.8	8.9	6.0
Supplier is licensed / approved	1.8	2.0	2.7	1.8
All of the above	33.0	21.8	40.9	36.4



Demographics

Age	Percent
18 to less than 25	4.8%
25 to less than 35	16.3
35 to less than 45	23.7
45 to less than 55	20.9
55 to less than 65	12.4
65 or more	20.3
Refused	1.6

Education	Percent
Some high school	6.3%
High school graduate	37.6
Some college	26.6
College graduate	22.4
Post graduate	6.1
Refused	0.9

Hispanic Background	Percent
Yes	1.3%
No	97.1
Refused	1.4

Race	Percent
White	89.3%
African-American	7.8
Asian	0.4
Aleutian	0.3
Other	0.3
Refused	1.9

Access to the Internet	Percent
Yes	59.1%
No	40.3
Don’t know	0.7

Community	Percent
Urban	24.5%
Suburban	47.0
Rural	26.7
Don’t know	1.8

Income	Percent
Under $9,999	2.3%
$10,000 to less than $25,000	10.4
$25,000 to less than $40,000	15.0
$40,000 to less than $50,000	14.2
$50,000 to less than $60,000	5.6
$60,000 to less than $75,000	5.9
$75,000 to less than $100,000	4.5
$100,000 or more	2.9
Don’t know	1.4
Refused	37.8

Gender	Percent
Male	37.3%
Female	62.8

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UTILITY SPECIFIC RESULTS

The following table presents the composite survey results alongside results for each of the incumbent local electric utilities throughout Ohio.

RESIDENTIAL

Survey Questions	Composite	Cincinnati Gas & Electric	Cleveland Electric	Columbus & Southern	Dayton Power & Light	Monongahela Power Co.	Ohio Edison	Ohio Power	Toledo Edison
1. Read, heard, or seen anything about deregulation	38.2%	42.9%	39.2%	35.8%	44.0%	38.0%	37.2%	32.4%	44.9%
2. Very/somewhat aware of deregulation	86.5	88.4	80.9	89.5	89.8	91.4	81.9	88.7	93.4
3. Utility is very/somewhat supportive of deregulation	35.6	41.9	25.5	42.7	38.6	34.2	35.8	43.6	32.6
10. Very/somewhat interested in electric competition	79.6	83.3	76.8	75.0	81.3	79.5	79.1	78.0	84.6
11. Rate reliable service (1-4)	89.1	87.5	88.3	89.3	90.8	87.0	89.5	92.0	86.4
12. Rate overall customer service (1-4)	85.8	84.0	84.5	85.5	86.3	83.5	87.8	89.3	85.1
13. Rate price (1-4)	45.1	40.9	45.4	50.8	43.3	46.8	48.6	53.2	35.2
14. Great/some confidence that electric service will be uninterrupted	86.1	85.0	83.5	87.0	84.5	85.3	84.3	91.7	87.1
15. Very/somewhat likely to use environmental information in your decision	86.0	88.0	85.5	85.5	89.5	88.0	85.8	89.8	88.1
16. Very aware of process to follow in selecting an electric supplier	10.3	11.5	8.0	11.0	8.8	13.3	11.0	16.8	10.4
17. Best reflects decision process… Made a decision to switch	1.8	1.2	1.7	1.3	1.8	1.5	2.5	2.0	4.2
Made a decision not to switch	11.3	11.2	10.7	13.8	11.5	16.8	13.0	14.9	8.7
Made a decision not to make a choice	10.3	10.7	11.7	11.0	12.5	12.0	8.2	8.8	10.2
Waiting for more information	75.7	76.3	74.6	74.0	73.8	69.3	73.8	72.7	76.2
18. Ability to review price to compare (Very/somewhat helpful)	91.7	90.8	94.8	91.3	93.5	93.8	89.8	94.9	94.0
19. Need to see 10% or less in order to switch	29.0	34.4	26.9	28.9	33.0	33.8	24.8	35.5	25.3
20. (1) Advantages – Lower prices	74.2	70.3	76.3	74.3	73.3	64.0	76.3	61.0	80.9
20. (6) Advantages – Improved customer service	32.2	38.4	28.2	31.5	31.5	27.0	31.9	19.5	30.8

RESIDENTIAL

Survey Questions	Composite	Cincinnati Gas & Electric	Cleveland Electric	Columbus & Southern	Dayton Power & Light	Monongahela Power Co.	Ohio Edison	Ohio Power	Toledo Edison
21. (1) Disadvantages – Higher prices	32.3%	32.4%	35.9%	29.5%	28.0%	28.5%	34.9%	28.0%	30.5%
21. (4) Disadvantages – Slamming/unauthorized switching	34.4	34.4	34.2	35.3	35.0	27.0	30.9	33.9	29.0
22. Very/somewhat likely to become a part of a group in order to bargain for a good price	63.2	68.8	60.3	64.8	64.3	63.8	62.1	67.8	67.7
23. Rate price (1-4)	95.4	94.0	94.0	96.5	95.8	96.3	94.3	96.3	96.3
24. Rate constant and reliable supply (1-4)	98.1	97.0	96.8	98.8	98.3	97.5	97.3	98.8	99.3
25. Rate environmental characteristics (1-4)	84.6	84.0	83.8	84.5	86.0	83.5	82.0	87.8	85.9
26. Rate customer service (1-4)	96.2	93.5	95.5	96.3	96.3	96.3	95.8	96.8	96.0
27. Rate supplier offers and other services (1-4)	50.2	47.6	51.1	47.0	50.5	50.8	51.4	52.9	51.6
28. Rate terms of contracts (1-4)	80.8	79.8	86.3	78.5	81.0	75.4	78.6	80.0	82.1
29. Rate length of contracts (1-4)	78.8	78.6	84.3	77.5	79.8	74.9	75.6	80.0	81.6
30. Rate reputation of company (1-4)	89.4	88.3	93.8	87.5	91.3	86.5	89.0	89.0	89.8
31. Rate name recognition of company (1-4)	74.8	69.8	74.8	69.5	72.5	69.5	74.8	78.5	73.4
33. (1) Would need – list of suppliers	32.3	27.1	41.6	23.1	25.6	28.2	32.1	29.2	28.7

BUSINESS

Survey Questions	Composite	Cincinnati Gas & Electric	Cleveland Electric	Columbus & Southern	Dayton Power & Light	Monongahela Power Co.	Ohio Edison	Ohio Power	Toledo Edison
1. Read, heard, or seen anything about deregulation	53.8%	55.4%	48.5%	55.3%	53.8%	46.6%	52.0%	52.2%	60.8%
2. Very/somewhat aware of deregulation	89.6	89.2	85.1	93.3	90.7	93.0	91.8	93.7	91.8
3. Utility is very/somewhat supportive of deregulation	45.9	45.0	42.3	39.9	45.1	53.5	44.7	48.3	36.9
10. Very/somewhat interested in electric competition	84.8	82.3	84.3	83.1	82.3	84.0	84.3	79.9	88.0
11. Rate reliable service (1-4)	83.6	79.6	81.3	86.4	83.3	89.3	85.8	86.8	84.5
12. Rate overall customer service (1-4)	79.5	76.6	74.5	83.9	80.8	85.0	83.8	81.2	79.6
13. Rate price (1-4)	43.1	35.7	44.0	40.4	43.8	52.4	45.3	51.1	28.9
14. Great/some confidence that electric service will be uninterrupted	85.4	85.3	84.5	86.8	82.0	87.8	83.0	89.1	90.0
15. Very/somewhat likely to use environmental information in your decision	81.0	78.3	81.3	82.4	82.5	81.8	77.8	84.0	82.3
16. Very aware of process to follow in selecting an electric supplier	23.6	25.4	20.3	27.3	21.5	26.4	21.8	24.4	63.1
17. Best reflects decision process… Made a decision to switch	3.1	6.2	2.3	4.7	2.5	2.5	3.5	1.3	6.2
Made a decision not to switch	19.7	15.2	16.0	16.9	17.3	19.2	20.8	24.2	12.0
Made a decision not to make a choice	13.6	15.2	16.0	16.1	14.5	14.7	11.5	15.8	13.7
Waiting for more information	61.0	59.6	61.3	61.3	64.3	61.8	61.3	57.8	65.6
18. Ability to review price to compare (Very/somewhat helpful)	90.9	85.5	94.3	86.8	89.5	91.0	87.0	94.4	93.5
19. Need to see 10% or less in order to switch	29.6	30.7	26.0	36.3	31.8	33.6	27.0	28.3	32.6
20. (1) Advantages – Lower prices	76.0	74.8	79.5	69.7	69.5	64.6	77.5	72.8	76.1
20. (6) Advantages – Improved customer service	33.6	35.9	32.0	41.4	36.3	34.4	33.5	26.7	34.4

BUSINESS

Survey Questions	Composite	Cincinnati Gas & Electric	Cleveland Electric	Columbus & Southern	Dayton Power & Light	Monongahela Power Co.	Ohio Edison	Ohio Power	Toledo Edison
21. (1) Disadvantages – Higher prices	36.8%	31.4%	36.5%	33.3%	36.0%	34.7%	40.5%	36.6%	31.9%
21. (4) Disadvantages – Slamming/unauthorized switching	44.3	39.4	36.5	46.2	43.8	44.6	45.5	50.4	42.1
22. Very/somewhat likely to become a part of a group in order to bargain for a good price	72.1	74.1	68.3	75.7	74.3	63.8	72.8	64.4	79.6
23. Rate price (1-4)	88.5	83.8	85.3	92.1	89.5	93.0	89.8	94.1	89.5
24. Rate constant and reliable supply (1-4)	93.0	89.0	92.3	96.5	93.0	96.5	93.3	97.5	93.3
25. Rate environmental characteristics (1-4)	74.8	68.3	73.5	77.4	72.3	80.0	73.5	81.4	73.6
26. Rate customer service (1-4)	89.8	84.5	88.3	91.6	91.3	94.8	90.3	93.9	90.3
27. Rate supplier offers and other services (1-4)	52.1	44.6	48.0	52.6	49.5	51.6	51.3	51.9	49.4
28. Rate terms of contracts (1-4)	68.3	64.3	67.0	69.2	71.8	74.1	68.5	70.5	75.1
29. Rate length of contracts (1-4)	68.7	68.6	68.3	67.5	70.0	71.8	70.0	70.2	77.1
30. Rate reputation of company (1-4)	79.1	79.3	80.5	77.9	78.8	82.8	81.0	82.4	81.8
31. Rate name recognition of company (1-4)	65.3	65.6	68.3	67.2	63.3	67.1	67.8	71.8	66.1
33. (1) Would need – list of suppliers	30.8	21.4	42.8	13.7	34.4	30.5	26.1	31.9	26.4

6 APPENDIX

INTERPRETATION OF AGGREGATE RESULTS

The computer processed data for this survey is presented in the following frequency distributions. It is important to note that the wordings of the variable labels and value labels in the computer-processed data are largely abbreviated descriptions of the Questionnaire items and available response categories.

The frequency distributions include the category or response for the question items. Responses deemed not appropriate for classification have been grouped together under the "Other" code.

The "NA" category label refers to "No Answer" or "Not Applicable". This code is also used to classify ambiguous responses. In addition, the "DK/RF" category includes those respondents who did not know their answer to a question or declined to answer it. In many of the tables, a group of responses may be tagged as "Missing" – occasionally, certain individual's responses may not be required to specific questions and thus are excluded. Although when this category of response is used, the computations of percentages are presented in two (2) ways in the frequency distributions: 1) with their inclusion (as a proportion of the total sample), and 2) their exclusion (as a proportion of a sample sub-group).

Each frequency distribution includes the absolute observed occurrence of each response (i.e. the total number of cases in each category). Immediately adjacent to the right of the column of absolute frequencies is the column of relative frequencies. These are the percentages of cases falling in each category response, including those cases designated as missing data. To the right of the relative frequency column is the adjusted frequency distribution column that contains the relative frequencies based on the legitimate (i.e. non-missing) cases. That is, the total base for the adjusted frequency distribution excludes the missing data. For many Questionnaire items, the relative frequencies and the adjusted frequencies will be nearly the same. However, some items that elicit a sizable number of missing data will produce quite substantial percentage differences between the two columns of frequencies. The careful analyst will cautiously consider both distributions.

The last column of data within the frequency distribution is the cumulative frequency distribution (Cum Freq). This column is simply an adjusted frequency distribution of the sum of all previous categories of response and the current category of response. Its primary usefulness is to gauge some ordered or ranked meaning.