

# CRE Aspirations: UMR Omnibus

Electricity Authority

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# Methodology and sample profile

## 1.1 Methodology

Results in this report are based upon questions asked in the UMR Research nation-wide Omnibus survey. This is an online survey of a nationally representative sample of 1000 New Zealanders 18 years of age and over.

Fieldwork was conducted from the 22<sup>nd</sup> to 26<sup>th</sup> of March 2019.

The margin of error for sample size of 1000 for a 50% figure at the '95% confidence level' is  $\pm 3.0\%$ .

This survey (for the first time) was conducted on an online platform. This will future proof the methodology and bring it in line with others key surveys conducted for the Electricity Authority such as the Electricity Consumers' Survey.

We have found the telephone approach was becoming more challenging as landline connections decline and digital communication becomes more common. This has seen a lower proportion of younger New Zealanders accessible by telephone.

## 1.2 Sample profile

Over 8 in 10 respondents (83%) of those surveyed were bill payers.

This report focuses on the general public's perceptions as opposed to the bill payer. As the latter represent a very high proportion of the general public, there is no significant difference between the results of the two groups. However, some differences do arise between bill payers and non-bill payers. Where this occurs, this is noted as will be the case for other demographics.

Ratings were on a 0-10 scale where 0 meant 'not at all competitive, 5 'neutral' and 10 'Extremely competitive'. Those who gave a 5-10 rating are described as rating an industry as 'competitive', those who gave a 0-4 rating are described as rating an industry as 'not competitive'.

# Executive summary

## • Industry competition

Just below two thirds (64%) of New Zealanders declared electricity retailers as competitive. This was a decrease of 9% from 2017. Perceived competitiveness has now returned to the same as recorded in 2013. There was no significant difference between those who pay the household electricity bill or have a say on the choice of electricity retailer ('bill payers') and those who do not pay the household electricity bill ('not a bill payer').

**64%** believed electricity retailers were competitive, down **9%**

Of seven industries included in the study, 'electricity retailers' dropped one place in the rankings to fourth out of seven on being competitive. 'Electrical goods stores' climbed the most in the ranking jumping two places to second.

As found in previous years, females and younger respondents were more likely to rate each industry as competitive. Additionally, respondents that ranked one type of industry as competitive were more likely to rank other types of business as competitive and those that rated aspects of the electricity industry as 'good' were also more likely to rank any given industry as competitive.

## • Rating aspects of the electricity industry

Ratings across all six aspects used to assess the performance of the electricity industry declined from the highs of 2017. The aspects that scored the highest positive ratings related to 'reliability of supply' and 'industry efficiency'.

**44%** rated reliability of supply as 'good', down **15%**

The decline in positive ratings were mostly due to an increase in those giving a 'neutral' response rather than a major negative shift in opinion. In this track, between 35% to 45% of respondents gave a 'neutral' or 'unsure' rating to all aspects. This may reflect more uncertainty in regard to these aspects rather than more negativity.

**41%** rated 'electricity is generated and supplied efficiently as 'good', down **18%**

The lowest rated aspect related to 'competition leading to cheap generation'. Around a quarter (24%) rated this aspect as good. This aspect fell one place to last in the rankings.

**26%** rated 'competition between retailers ensures prices paid rise in line with costs' as 'good', down **6%**

The aspect related to 'competition leading to consumers paying only rises in line with costs to the electricity companies' jumped two places in the ranking to fourth (26% rated this as good).

**24%** rated 'competition among generators ensures efficient power stations are built' as 'good', down **10%**

Ratings for bill payers were very similar to the general public with the 'good' ratings dropping across all aspects compared to previous surveys and the ranking of the aspects remaining the same as the general public. Bill payers and non-bill payers also recorded similar good ratings across the aspects except for aspects related 'reliability of supply' and 'industry efficiency', where bill-payers tended to rate these aspects slightly higher than non-bill payers.

**34%** rated enough electricity to meet ongoing needs as 'good', **down 9%**

**25%** rated the market ensuring the right mix of power stations as 'good', **down 13%**

Similar to 2017, respondents under 45 were more likely to rate the aspects as good than older respondents and male respondents were generally more likely to rate the tested aspects as good.

Similar to previous years, those who rated 'electricity retailers' as competitive were more likely to give a 'good' rating than those who thought they were uncompetitive for all the aspects. Also, those who rated any one aspect as good were more likely to rate other aspects as good than those who gave a poor rating.

# Industry competition

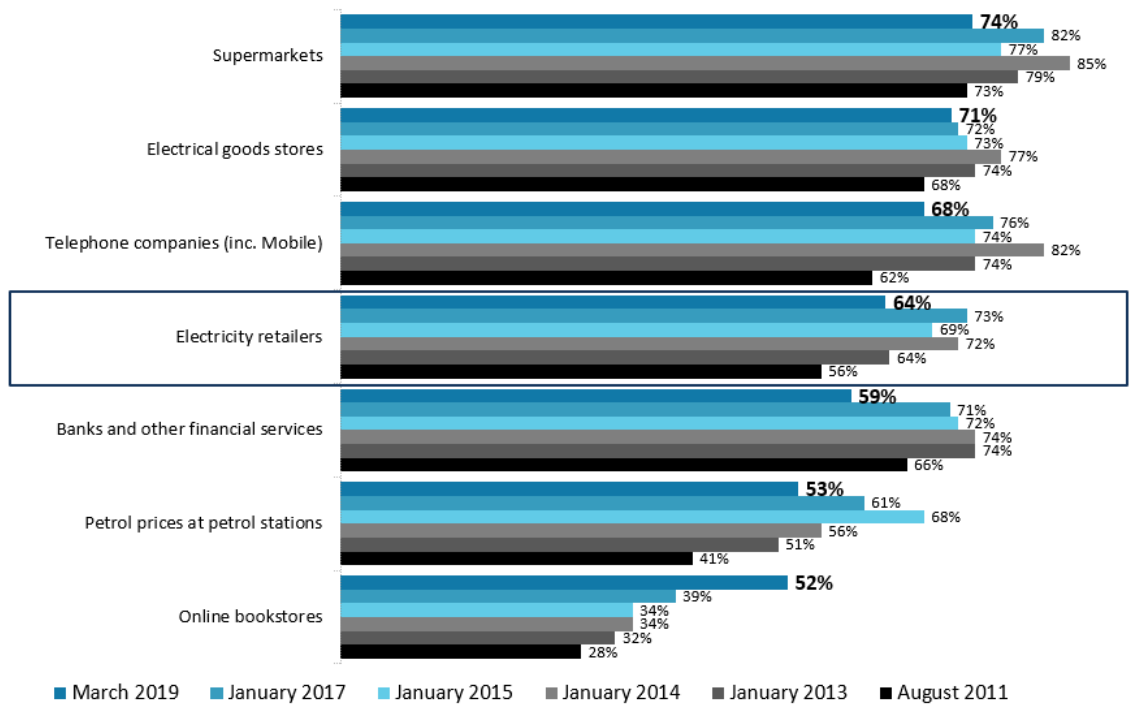
## 1.3 Rating industry competition

Perceived competitiveness decreased in all but one of the seven industries tested in the latest monitor, which included 'electricity retailers'. Online bookstores recorded the only rise in competitiveness (up 13% from 2017 to 52%).

'Electricity retailers' dropped one place in the ranking from 2017 to fourth position on competitiveness with 64% (down 9%), behind 'telephone companies', electrical good stores' and 'supermarkets'.

### Industry competition - summary

Total competitive (%) (5-10)



Base: All respondents (n=1000), previous years (n=750)

Figure 1. A summary of ratings of competitiveness across different industries, tracked 2011-2019

- **Electricity retailers**

The proportion of people who thought that 'electricity retailers' were competitive decreased by 9% to 64%. Perceived competitiveness of 'electricity retailers' in 2019 was the same as recorded in 2014.

- **Most competitive**

'Supermarkets' (74%) and 'electrical good stores' (71%) were the top two industries that were rated the highest in competitiveness this year. Both industries also dropped in perceived competitiveness (supermarkets; down 8% and electrical good stores; down 1%).

'Telephone companies' dropped one place in ranking to third with perceived competitiveness dropping 8% to 68%.

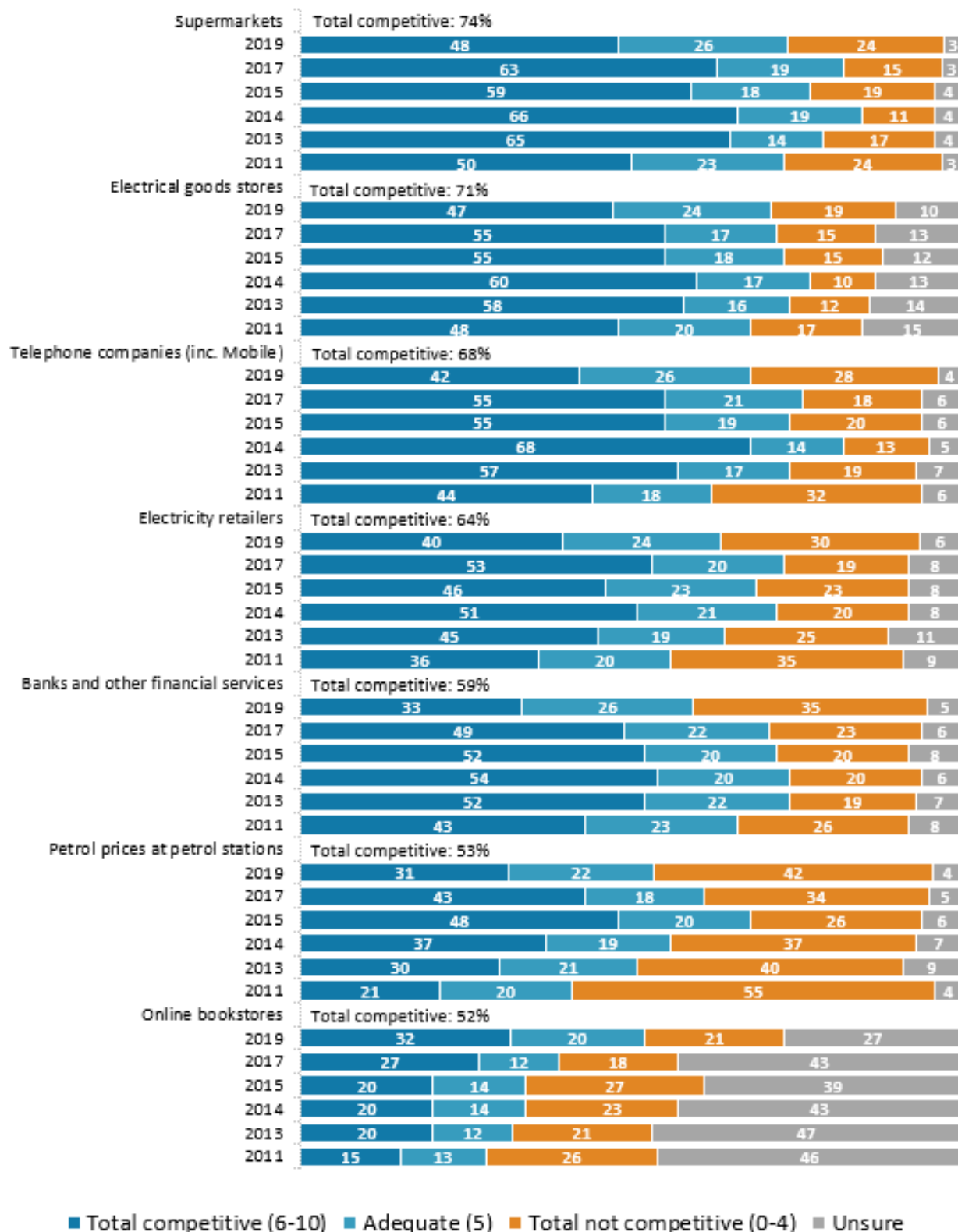
- **Least competitive**

Even after a rise of 13%, 'online bookstores' were once again rated the least competitive on 52%. 'Online bookstores' also recorded the highest unsure rating (27%).

Perceived competitiveness of 'petrol prices at petrol stations' dropped by 8% to 53%. This makes this industry the second least competitive industry out of those tested.

# Industry competition

(%)



Base: All respondents (n=1000), previous years (n=750)

Figure 2. Ratings of competitiveness across different industries, tracked 2011-2019



## 1.4 Rating industry competition across bill payers

Perceived competitiveness across bill payers showed similar trends to the general results, with a similar drop in perceived competitiveness across all industries tested except for 'online bookstores' (up 14%). The ranking of the industries was also the same as the general results with 'electricity retailers' ranked fourth on competitiveness across bill payers.

### Industry competition: billpayers

Total competitive (%) (5-10)

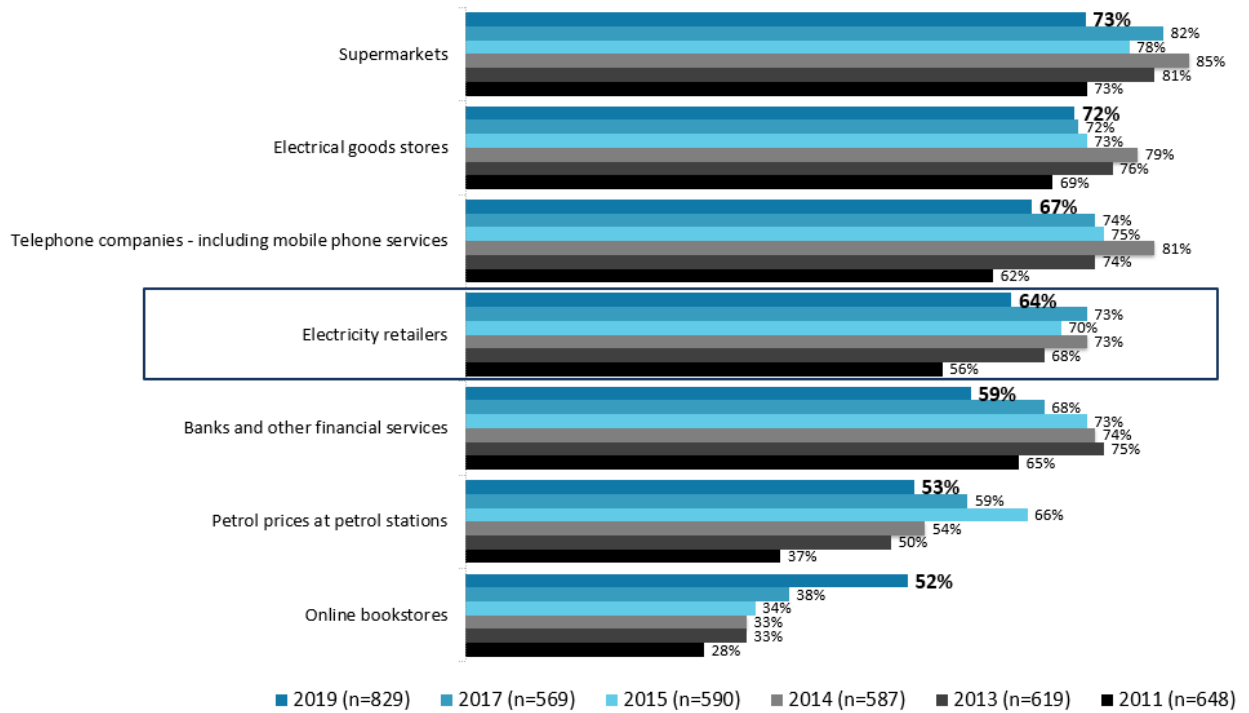


Figure 3. A summary of ratings of competitiveness across different industries as rated by bill payers, tracked 2011-2019

## 1.5 Bill payers compared with non-bill payers

There were no statistically significant differences between bill payers and non-bill payers. Around two thirds (64%) of bill payers rated 'electricity retailers' compared to 61% of non-bill payers.

The largest difference in competitiveness between bill payers and non-bill payers was recorded for 'telephone companies'. An 8% difference between the groups was registered with 67% of bill payers rating the industry competitive and 75% of non-bill payers.

### Industry competition: bill payers vs. non-bill payers

Total competitive (%) (5-10)

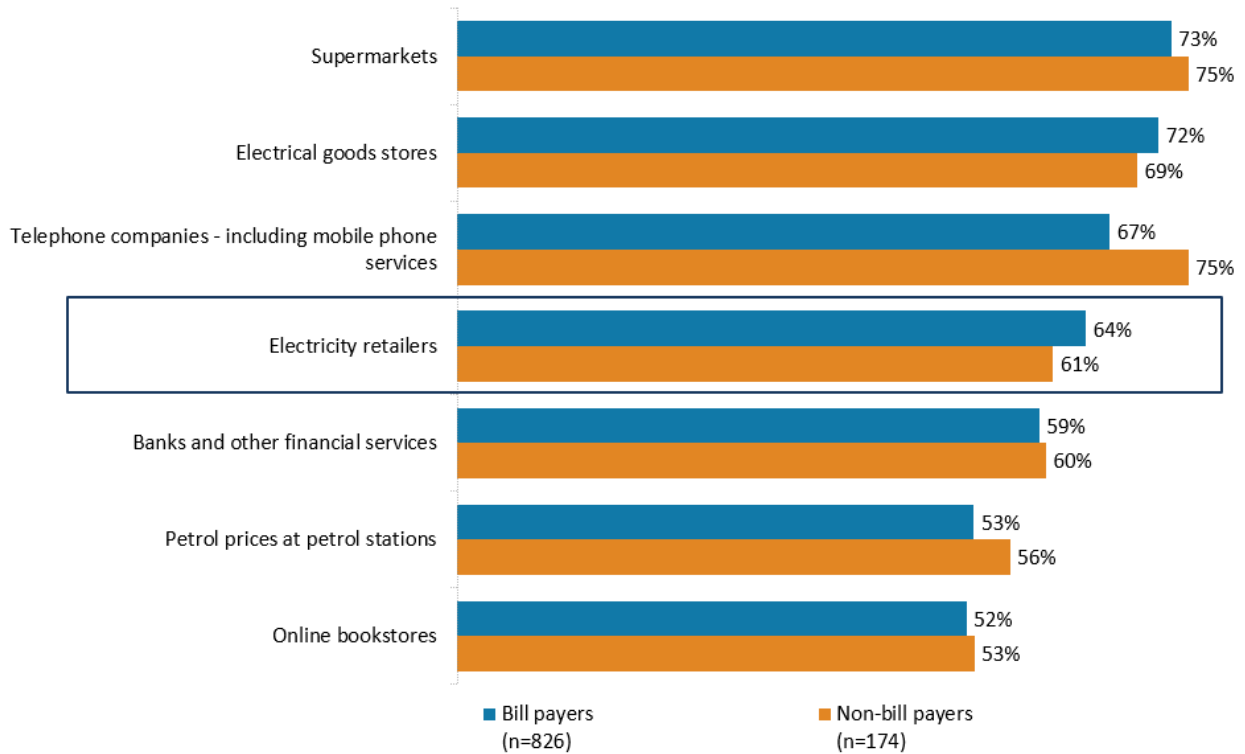


Figure 4. Ratings of competitiveness across different industries as rated by bill payers compared to non-bill payers in 2019

## 1.6 Consumers compared with stakeholders

Consumers were generally rated industries similarly or slightly less competitive when compared to stakeholders. The exceptions were 'electrical goods stores', 'online bookstores', and to a lesser extent 'telephone companies' which were rated significantly lower by consumers.

The industry with the largest difference in perceived competition between consumers and stakeholders were 'electrical goods stores' (a difference of 17 points) which was closely followed by 'online bookstores' (a difference of 16 points). There was a 7 point difference for 'telephone companies'.

### Industry Competition: Consumers vs. Stakeholders

Total 'just adequate' to 'extremely competitive' (%) (5-10)

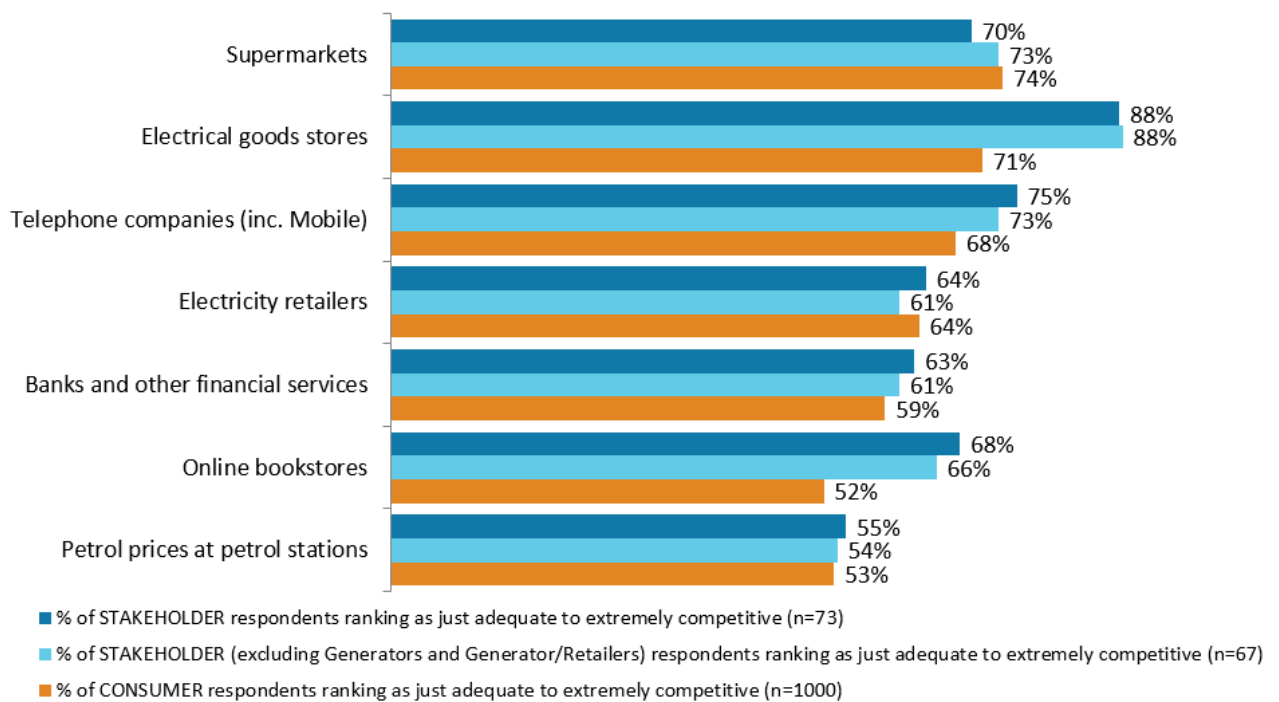


Figure 5. Ratings of competitiveness across different industries as rated by consumers compared to stakeholders in 2019

# The electricity industry

## 1.7 Rating aspects of the electricity industry

Performance of the electricity industry across all six key aspects tested dropped from the highs in 2017.

As found in previous years, aspects related to efficient supply and reliability rated better than did those related to competitiveness of the industry. ‘A reliable supply of electricity each day’ and ‘electricity market ensures electricity is generated and supplied efficiently’ received the highest ratings (44% and 41% respectively).

All aspects recorded a drop of 6-15% from their highs in 2017, however, the drops are mostly due to an increase in people giving a ‘neutral’ response rather than an increased proportion rating these aspects more negatively. This may point to more New Zealanders being uncertain on how to rate these aspects of the electricity industry.

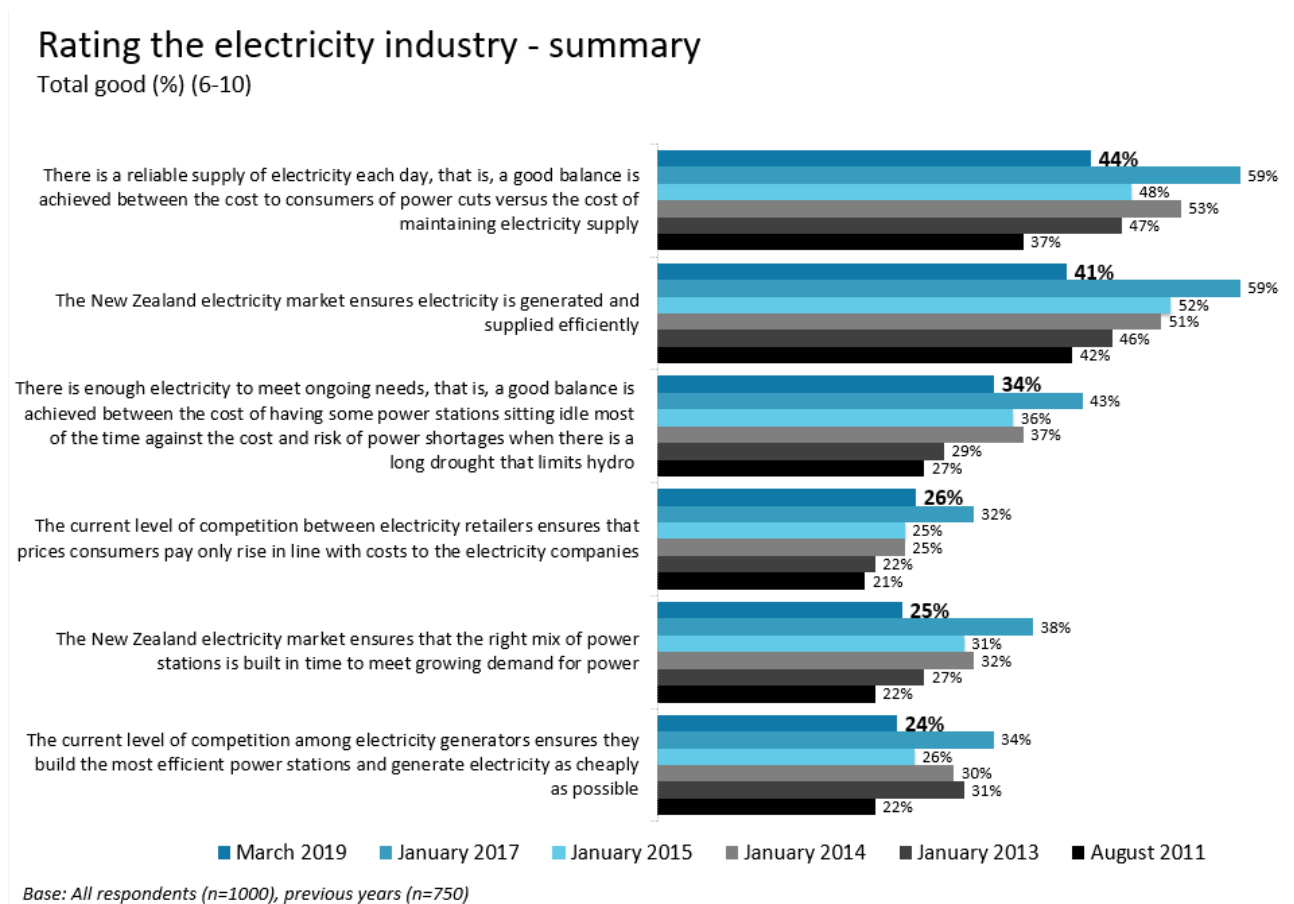


Figure 6. A summary of performance of aspects of the electricity industry, tracked 2011-2019.

- **Reliable supply of electricity each day**

The aspect *'There is a reliable supply of electricity each day, that is, a good balance is achieved between the cost to consumers of power cuts versus the cost of maintaining electricity supply'*, recorded the highest rating with 44% (down 15%) rating this aspect as good.

- **Market ensures electricity is generated and supplied efficiently**

The aspect *'The New Zealand electricity market ensures electricity is generated and supplied efficiently'* recorded the second highest rating. However, it is the lowest this aspect has scored since tracking began and had the largest drop (41%, down 18%).

- **Enough electricity to meet ongoing needs**

*'There is enough electricity to meet ongoing needs, that is, a good balance is achieved between the cost of having some power stations sitting idle most of the time against the cost and risk of power shortages when there is a long drought that limits hydro generation'* remained third in ranking despite dropping 9% to 34%.

- **Level of competition between retailers ensures consumer prices only rise in line with electricity companies' costs**

The rating for the aspect *'The current level of competition among electricity generators ensures they build the most efficient power stations and generate electricity as cheaply as possible'* moved two spots in the ranking from 2017. Around a quarter (26%) of all respondents rated this aspect as good, down 6% (the smallest drop in 2019).

- **Electricity market ensures the right mix of power stations built in time to meet demand**

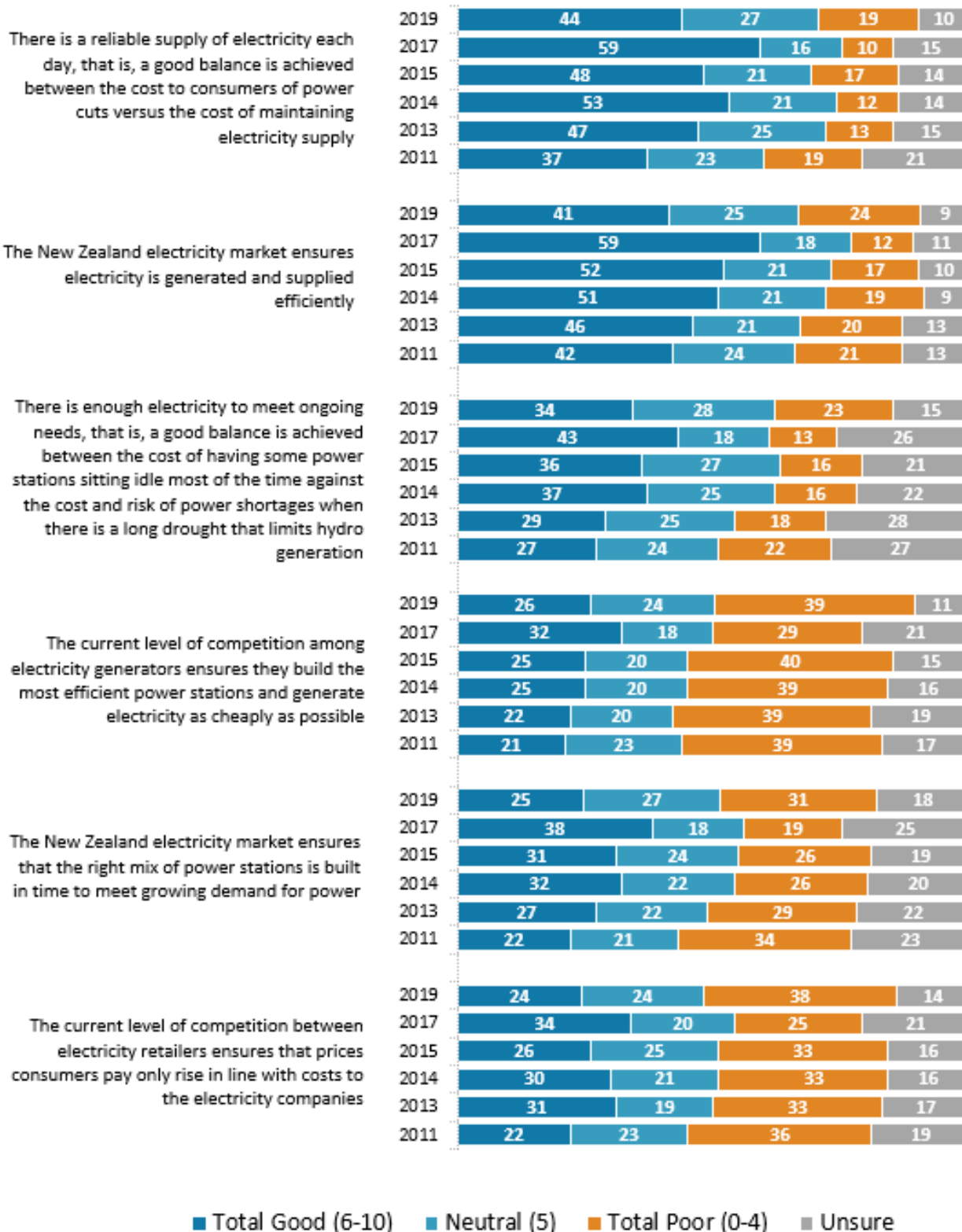
A quarter of respondents rated the aspect *'The New Zealand electricity market ensures that the right mix of power stations is built in time to meet growing demand for power'* as good (down 13%).

- **Level of competition ensures most efficient power stations built and generation is as cheap as**

The rating for the aspect *'The current level of competition among electricity generators ensures they build the most efficient power stations and generate electricity as cheaply as possible'* decreased 10% to 24% and now is the lowest rated aspect out of the six.

# Rating the electricity industry

(%)



■ Total Good (6-10) ■ Neutral (5) ■ Total Poor (0-4) ■ Unsure

Base: All respondents (n=1000), previous years (n=750)

Figure 7. Ratings of performance of aspects of the electricity industry, tracked 2011-2019

## 1.8 Rating aspects of the electricity industry for bill payers

Ratings for bill payers were very similar to the general public with the 'good' ratings dropping across all aspects compared to previous surveys and the ranking of the aspects remaining the same as the general public.

### Rating the electricity industry: bill payers

Total good (%) (6-10)

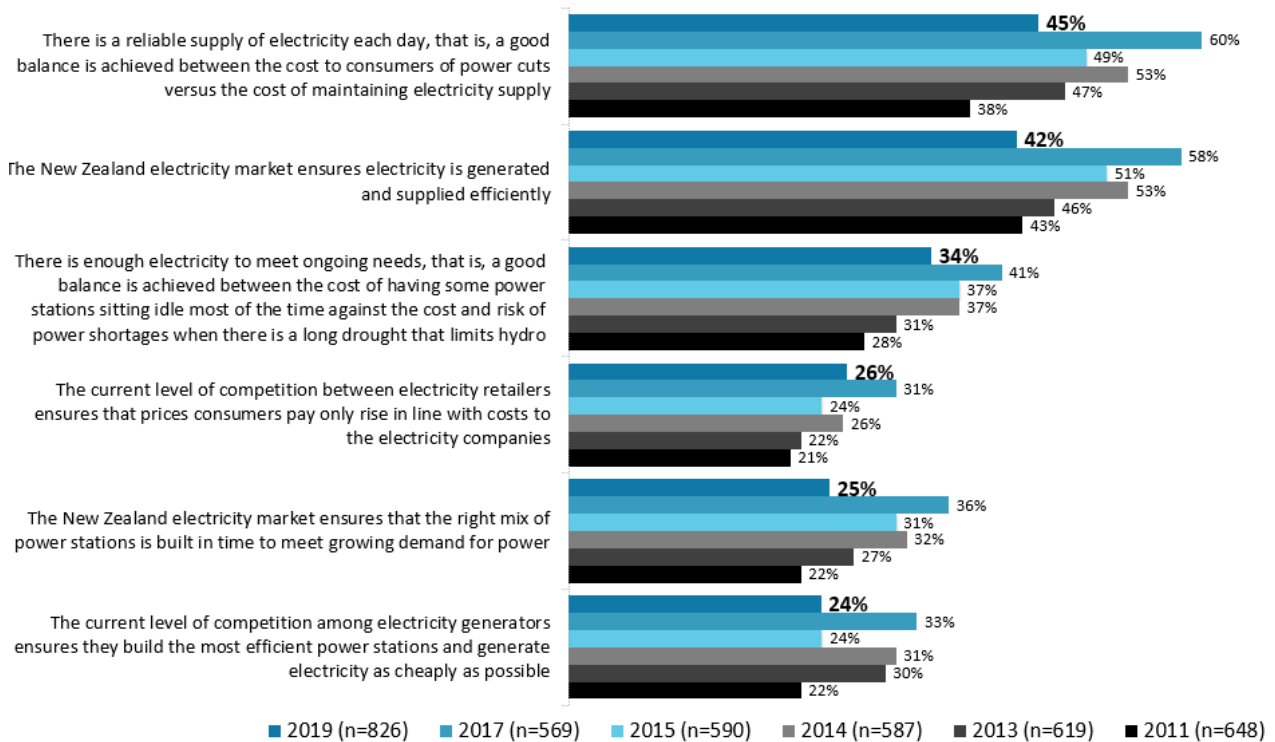


Figure 8. Performance of aspects of the electricity industry as rated by bill payers, tracked 2011-2019.

## 1.9 Bill payers compared with non-bill payers

When compared to bill payers, non-bill payers generally gave similar ratings on performance of all aspects of the electricity industry.

### Rating the electricity industry: bill payers vs. non-bill payers

Total good (%) (6-10)

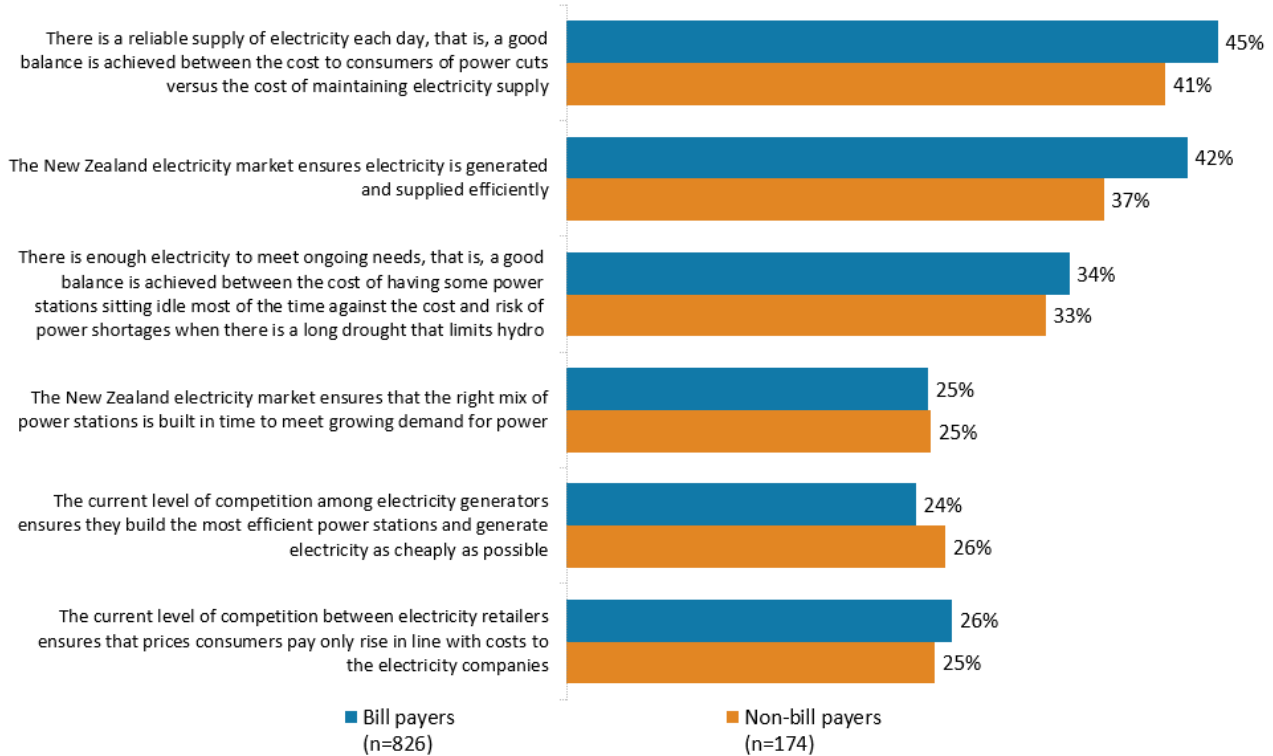


Figure 9. Performance of aspects of the electricity industry as rated by bill payers compared to non-bill payers in 2019.



## 1.10 Consumers compared with stakeholders

Similar to previous years, consumers were significantly less likely than stakeholders to rate aspects of the electricity industry positively, although all of these differences reflected higher 'neutral' ratings among consumers rather than a purely negative shift in perceptions.

The biggest difference between 'total good' consumer rating and stakeholder rating was recorded for the statements 'the current level of competition among electricity generators ensure they build the most efficient power stations and generate electricity as cheaply as possible' (55% stakeholders and 24% consumers) and 'a reliable supply of electricity each day'(75% stakeholders and 44% consumers). Both statements recorded a difference of 31%. This was closely followed by the statement 'the New Zealand electricity market ensure that the right mix of power stations is built in time to meet growing demand for power', which recorded a difference 30 points (55% stakeholders and 25% consumers).

All other aspects had differences of 10-22% between consumer positive ratings and stakeholder positive ratings.

### Rating the industry: Consumers vs. Stakeholders

Total good (%) (6-10)

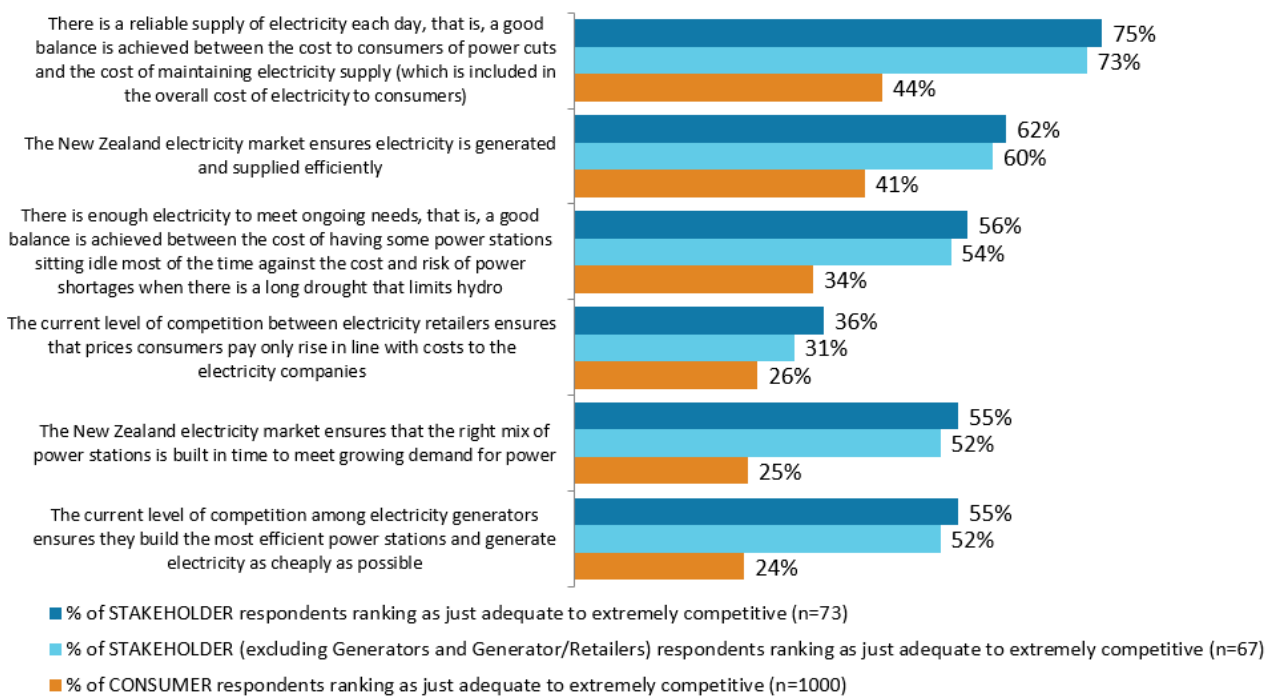


Figure 10. Performance of aspects of the electricity industry as rated by consumers compared to stakeholders in 2019

# Detailed tables and demographics

## 2.1 Demographic analysis: industry competition

Generally, younger respondents (under 30s) and female respondents tended to rate industries as more competitive. Also, respondents that ranked one type of business as competitive were more likely to rank other types of business as competitive. Those who rated aspects of the electricity industry as 'good' were also more likely to rank any given business as competitive

- **Electricity retailers**

There were no other statistical differences among the demographics.

- **Most competitive**

Females respondents were more likely to rate 'supermarkets' as competitive compared to male respondents (78% and 69% respectively).

Those with a household income less than \$50k tended to rate 'supermarkets' as competitive compared to those with a higher household income (81% compared to 70%).

Respondents not working also tended to rate 'supermarkets' as competitive compared to those who work full time (78% and 69% respectively).

Respondents aged 30-44 were less likely to rate 'supermarkets' as competitive (69%).

- **Least competitive**

Male respondents were more likely to rate 'online bookstores' as competitive compared to female respondents (56% and 46% respectively).

Females respondents were more inclined to rate petrol prices at petrol stations as competitive compared to male respondents (57% and 50% respectively).

Under 30s were also more likely to perceive petrol prices to be competitive (61%).

Aucklanders and those in living in the lower North Island (excluding Wellington) were more likely to rate 'petrol prices' as competitive (59% and 64% respectively), whilst those residing in Wellington and in the South Island (excluding Christchurch) were less likely to rate this as competitive (39% and 44% respectively).

## ELECTRICITY BILL PAYERS

Are you responsible for paying the electricity bill in your household or have a say in who your electricity provider is?

	January 2013 %	January 2014 %	January 2015 %	January 2017 %	March 2019 %
Yes	82	78	79	76	83
No/Unsure	18	22	21	24	17

Base: All respondents (n=1000)

## COMPETITIVENESS OF BUSINESSES (SUMMARY - COMPETITIVE)

Using a 0-10 scale where 0 means not at all competitive, 5 means just adequate and 10 means extremely competitive, how competitive are the following businesses in terms of working to get your business and offering you the best deals? If you do not know enough, just say so. (competitive 5-10)

	January 2017			January 2019		
	All (n=750) %	Bill payers (n=569) %	Non-bill payers (n=176) %	All (n=1000) %	Bill payers (n=826) %	Non-bill payers (n=174) %
Supermarkets	82	82	85	74	73	75
Electrical goods stores	72	72	69	71	72	69
Telephone companies - including mobile phone services	76	74	82	68	67	75
Electricity retailers	73	73	70	64	64	61
Banks and other financial services	71	68	77	59	59	60
Petrol prices at petrol stations	61	59	69	53	53	56
Online bookstores	39	38	43	52	52	53

Base: All respondents (n=1000)

## COMPETITIVENESS OF BUSINESSES (OVERALL)

Using a 0-10 scale where 0 means not at all competitive, 5 means just adequate and 10 means extremely competitive, how competitive are the following businesses in terms of working to get your business and offering you the best deals? If you do not know enough, just say so.

	0 - Not at all competitive	1	2	3	4	Total not competitive	5 - Just adequate	6	7	8	9	10 - Extremely competitive	Total competitive	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Supermarkets	5	3	4	6	6	24	25	12	13	11	5	8	48	3
Electrical goods stores	4	1	3	5	5	19	24	12	13	11	4	6	47	10
Telephone companies – including mobile phone services	6	4	5	7	6	28	26	10	12	9	5	7	42	4
Electricity retailers	7	4	4	8	7	30	24	10	10	8	4	7	39	6
Banks and other financial services	8	5	7	9	7	35	26	10	9	6	4	5	34	5
Online bookstores	7	2	3	5	4	21	20	8	8	8	3	4	32	27
Petrol prices at petrol stations	13	6	8	8	7	42	22	8	8	6	3	7	31	4

Base: All respondents (n=1000)

## COMPETITIVENESS OF BUSINESSES (BILL PAYERS)

Using a 0-10 scale where 0 means not at all competitive, 5 means just adequate and 10 means extremely competitive, how competitive are the following businesses in terms of working to get your business and offering you the best deals? If you do not know enough, just say so.

	0 - Not at all competitive	1	2	3	4	Total not competitive	5 - Just adequate	6	7	8	9	10 - Extremely competitive	Total competitive	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Supermarkets	5	3	4	6	6	25	25	13	12	10	6	7	48	2
Electrical goods stores	5	1	3	5	5	19	24	12	13	12	5	5	48	9
Telephone companies – including mobile phone services	6	4	5	8	6	30	25	10	11	8	6	6	41	3
Electricity retailers	7	4	4	8	7	31	24	11	11	8	4	6	41	5
Banks and other financial services	9	6	7	9	6	36	26	10	9	6	4	4	33	4
Online bookstores	8	2	3	5	4	21	19	8	9	8	4	4	33	27
Petrol prices at petrol stations	14	7	8	8	7	43	21	8	7	6	3	7	32	4

Base: 83% of respondents, those who pay the electricity bill or have a say in who the electricity provider is, n=826

## COMPETITIVENESS OF BUSINESSES (NON-BILL PAYERS)

Using a 0-10 scale where 0 means not at all competitive, 5 means just adequate and 10 means extremely competitive, how competitive are the following businesses in terms of working to get your business and offering you the best deals? If you do not know enough, just say so.

	0 - Not at all competitive	1	2	3	4	Total not competitive	5 - Just adequate	6	7	8	9	10 - Extremely competitive	Total competitive	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
Supermarkets	5	1	1	8	4	18	25	7	17	16	4	9	52	4
Electrical goods stores	3	2	3	6	4	18	26	13	12	7	1	11	44	13
Telephone companies – including mobile phone services	5	2	3	6	4	21	28	9	16	11	2	9	47	5
Electricity retailers	6	2	3	7	6	24	27	8	8	8	3	8	34	15
Banks and other financial services	6	2	6	8	8	31	25	8	10	7	3	8	35	9
Online bookstores	5	1	3	6	4	19	26	9	6	6	1	5	27	28
Petrol prices at petrol stations	11	5	7	7	7	37	26	5	9	6	1	8	30	7

Base: 17% of respondents, those who do not pay the electricity bill or have a say in who the electricity provider is, n=174

## RATING ELECTRICITY INDUSTRY (SUMMARY - GOOD)

Using a 0-10 scale where 0 means extremely poor, 5 means neutral and 10 means extremely good, how would you rate the electricity industry in New Zealand on the following? If you do not know enough, just say so. (Good 6-10)

	January 2017			January 2019		
	All (n=750) %	Bill payers (n=569) %	Non-bill payers (n=176) %	All (n=1000) %	Bill payers (n=826) %	Non-bill payers (n=174) %
There is a reliable supply of electricity each day, that is, a good balance is achieved between the cost to consumers of power cuts versus the cost of maintaining electricity supply	59	60	57	44	45	41
The New Zealand electricity market ensures electricity is generated and supplied efficiently	59	58	62	41	42	37
There is enough electricity to meet ongoing needs, that is, a good balance is achieved between the cost of having some power stations sitting idle most of the time against the cost and risk of power shortages when there is a long drought that limits hydro generation	43	41	48	34	34	33
The current level of competition among electricity generators ensures they build the most efficient power stations and generate electricity as cheaply as possible	34	33	37	26	26	25
The New Zealand electricity market ensures that the right mix of power stations is built in time to meet growing demand for power	38	36	41	25	25	25
The current level of competition between electricity retailers ensures that prices consumers pay only rise in line with costs to the electricity companies	32	31	35	24	24	26

Base: All respondents (n=1000)

## 2.2 Demographic analysis: rating aspects of the electricity industry

Respondents under 45 and males were more likely to rate all of these aspects as 'good' and generally, male respondents also were more likely to rate these aspects as good

Those who rated 'electricity retailers' as competitive were more likely to give a 'good' rating than those people who think they are uncompetitive for all the aspects. Also, those who rated any one aspect as good were more likely to rate other aspects as good.

- **Reliable supply of electricity each day**

Residents in Auckland tended to rate this aspect as good (49%) whilst those residing in upper North Island were less likely to rate it as good (37%).

- **Market ensures electricity is generated and supplied efficiently**

Older respondents (45+) were less likely to rate this aspect as good (36%) than their younger counterparts (47%). There were no statistically significant differences among other demographics.

- **Enough electricity to meet ongoing needs**

Similar to previous years, male respondents were more likely to rate this aspect as good compared to female respondents (38% and 30% respectively).

Those residing in upper North Island (excluding Auckland) were less likely to rate this as good (27%) compared to the overall sample (34%).

- **Level of competition between retailers ensures consumer prices only rise in line with electricity companies' costs**

Aucklanders were more likely to rate this aspect as good (30%) when compared to the overall public (26%).

Female respondents were less likely to rate this aspect as good (24%).

- **Electricity market ensures the right mix of power stations built in time to meet demand**

A higher proportion of male respondents rated this aspect as good than female respondents (28% and 22% respectively).

Aucklanders were more inclined to rate this aspect as good (30%).

- **Level of competition ensures most efficient power stations built and generation is as cheap as possible**

Cantabarians were more likely to declare a good rating for this aspect (32%), whilst those residing in lower North Island (excluding Wellington) were less likely to declare a good rating (16%).



## RATING ELECTRICITY INDUSTRY (OVERALL)

Using a 0-10 scale where 0 means extremely poor, 5 means neutral and 10 means extremely good, how would you rate the electricity industry in New Zealand on the following? If you do not know enough, just say so.

	0 - Extremely poor	1	2	3	4	Total poor	5 - Neutral	6	7	8	9	10 - Extremely good	Total good	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
There is a reliable supply of electricity each day, that is, a good balance is achieved between the cost to consumers of power cuts versus the cost of maintaining electricity supply	3	2	3	5	6	19	27	10	11	10	5	7	44	10
The New Zealand electricity market ensures electricity is generated and supplied efficiently	5	3	4	5	7	24	25	9	11	10	5	6	41	9
There is enough electricity to meet ongoing needs, that is, a good balance is achieved between the cost of having some power stations sitting idle most of the time against the cost and risk of power shortages when there is a long drought that limits hydro generation	3	2	4	6	7	23	28	10	8	9	3	5	34	15
The current level of competition between electricity retailers ensures that prices consumers pay only rise in line with costs to the electricity companies	9	5	7	10	8	39	24	8	8	4	2	3	26	11
The New Zealand electricity market ensures that the right mix of power stations is built in time to meet growing demand for power	7	4	6	7	7	31	27	8	7	5	2	3	25	18
The current level of competition among electricity generators ensures they build the most efficient power stations and generate electricity as cheaply as possible	8	4	8	9	8	38	24	9	7	3	3	2	24	14

Base: All respondents (n=1000)

## RATING ELECTRICITY INDUSTRY (BILL PAYERS)

Using a 0-10 scale where 0 means extremely poor, 5 means neutral and 10 means extremely good, how would you rate the electricity industry in New Zealand on the following? If you do not know enough, just say so.

	0 - Extremely poor	1	2	3	4	Total poor	5 - Neutral	6	7	8	9	10 - Extremely good	Total good	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
There is a reliable supply of electricity each day, that is, a good balance is achieved between the cost to consumers of power cuts versus the cost of maintaining electricity supply	3	3	3	6	6	21	26	11	11	11	5	7	45	8
The New Zealand electricity market ensures electricity is generated and supplied efficiently	5	3	5	6	7	26	24	10	12	10	5	6	42	8
There is enough electricity to meet ongoing needs, that is, a good balance is achieved between the cost of having some power stations sitting idle most of the time against the cost and risk of power shortages when there is a long drought that limits hydro generation	4	2	5	7	7	25	28	10	7	9	3	5	34	13
The current level of competition between electricity retailers ensures that prices consumers pay only rise in line with costs to the electricity companies	10	6	8	10	8	42	23	8	8	5	3	3	26	8
The New Zealand electricity market ensures that the right mix of power stations is built in time to meet growing demand for power	8	5	6	7	8	34	25	7	7	6	2	3	25	16
The current level of competition among electricity generators ensures they build the most efficient power stations and generate electricity as cheaply as possible	9	5	9	9	8	40	24	9	7	3	2	2	24	12

Base: 83% of respondents, those who pay the electricity bill or have a say in who the electricity provider is, n=826

## RATING ELECTRICITY INDUSTRY (NON-BILL PAYERS)

Using a 0-10 scale where 0 means extremely poor, 5 means neutral and 10 means extremely good, how would you rate the electricity industry in New Zealand on the following? If you do not know enough, just say so.

	0 - Extremely poor	1	2	3	4	Total poor	5 - Neutral	6	7	8	9	10 - Extremely good	Total good	Unsure
	%	%	%	%	%	%	%	%	%	%	%	%	%	%
There is a reliable supply of electricity each day, that is, a good balance is achieved between the cost to consumers of power cuts versus the cost of maintaining electricity supply	1	0	3	3	4	11	29	10	10	8	6	8	41	18
The New Zealand electricity market ensures electricity is generated and supplied efficiently	3	0	4	3	5	15	30	6	8	11	4	7	37	18
There is enough electricity to meet ongoing needs, that is, a good balance is achieved between the cost of having some power stations sitting idle most of the time against the cost and risk of power shortages when there is a long drought that limits hydro generation	2	2	3	5	6	17	28	9	8	8	4	4	33	23
The current level of competition between electricity retailers ensures that prices consumers pay only rise in line with costs to the electricity companies	6	1	2	9	5	23	27	10	7	3	2	4	25	25
The New Zealand electricity market ensures that the right mix of power stations is built in time to meet growing demand for power	4	2	3	3	3	15	31	10	7	4	1	3	25	29
The current level of competition among electricity generators ensures they build the most efficient power stations and generate electricity as cheaply as possible	5	1	6	9	7	28	24	9	6	4	4	3	26	23

Base: 17% of respondents, those who do not pay the electricity bill or have a say in who the electricity provider is, n=174

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