



ENERGY RETAILERS COMPARATIVE PERFORMANCE REPORT – CUSTOMER SERVICE

2013-14

December 2014

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OVERVIEW OF THIS YEAR'S REPORT

This report presents information about the level of customer service that retailers provided to Victorian electricity and gas consumers in 2013-14, and complements the Commission's annual price comparison reports. The Commission has produced these reports for many years on the basis that the performance of energy retailers, as the providers of an essential service to the community, requires close scrutiny by customers, regulators, commentators and policy makers.

The Commission has commenced a review of disconnections and hardship arrangements and many of the findings discussed in this report will be explored further as part of that review.

This report covers three key areas of customer service: hardship, disconnections and complaints.

HARDSHIP

Overall participation in retailers' hardship programs increased in 2013-14. Program participation increased by 9 317 participants in 2013-14 — up from 24 356 to 33 673, an increase of 38 per cent. A total of 0.81 per cent of residential customers for gas and electricity participated in hardship programs in 2013-14, up from 0.57 per cent in 2012-13. Hardship programs are open to all customers, not just concession card holders. Indeed, 29 per cent of hardship program participants were not concession card holders. This proportion remained unchanged in the last year.

At first glance, increased participation by consumers in hardship programs can be viewed as an indicator of greater consumer financial stress. However, the Commission notes that increased participation may be a positive development, because it could indicate the increasing commitment of retailers to provide assistance through hardship programs. Likewise, the findings that fewer customers were denied access to retailers'

hardship programs this year and that instalment plans were made more readily available, may suggest a greater commitment by retailers to support customers encountering difficulty paying their bills.

Despite these positive indications, the Commission is concerned by its finding that despite the average debt on entry into hardship program having increased in the last year (from \$742 to \$1 034), the average time spent in hardship programs declined (from 382 to 265 days). The Commission will also seek further information on why 51 per cent of customers who exited retailers' hardship programs had failed to comply with the terms of those programs.

During 2013-14, there was little change in the total concession payments paid by the Department of Human Services but there was a significant increase in the number of Utility Relief Grants (URGs) provided to electricity and gas customers (up 31 and 23 per cent, respectively). The unchanged level of concession payments may reflect the Commission's earlier finding that prices remained fairly stable last year¹, whereas the increased reliance on URGs may be related to the greater debt levels mentioned above.

DISCONNECTIONS

The residential electricity disconnection rate increased this year to 1.47 per 100 customers, up from 1.07 in 2012-13. Over 34 000 customers were disconnected in 2013-14 (up 36 per cent from 2012-13). The disconnection rate for gas customers also increased this year. Retailers reported 1.33 disconnections per 100 customers, up from 0.89 per 100 customers in 2012-13 (an increase of 42 per cent).

Some caution, however, needs to be exercised in comparing 2013-14 disconnection findings with those reported for the previous year. As we reported last year, due to problems with its billing system, in 2012-13 EnergyAustralia ceased disconnecting customers while it sought to implement its new billing system. Excluding

¹ Essential Services Commission 2014, *Energy retailers comparative performance report—pricing 2013-14*, October 2014

EnergyAustralia from the results last year indicated an underlying rate of 1.38 disconnections per 100 electricity customers. Excluding EnergyAustralia from the 2013-14 figures indicates the underlying rate of disconnection of electricity customers has increased to 1.87 disconnections per 100.² For gas customers, the corresponding underlying rates were 1.20 and 1.69 per 100 customers in 2012-13 and 2013-14, respectively.

These are the highest rates of disconnection ever recorded by the Commission.

Among individual retailers, only AGL and Red Energy reduced the rate at which they disconnected customers. Alinta Energy, Click Energy, Lumo Energy, Neighbourhood Energy, Origin Energy and Simply Energy all increased their disconnection rates by at least double.

The Commission is concerned by the increase in the number of disconnections in 2013-14, and is inquiring into issues surrounding disconnection and hardship in the Victorian energy industry. While the responsibility to stay connected is a shared one, the Commission is concerned with ensuring that retailers are applying hardship policies and procedures in a way that would minimise the likelihood of disconnection.

The electricity disconnection rate for business customers increased in 2013-14, to 2.19 per 100 customers from 0.91 per 100 in 2012-13. Business gas customers also recorded an increased disconnection rate in 2013-14, up to 1.17 per 100 customers from 0.60 per 100 in 2012-13.

² It would appear that EnergyAustralia has not fully recommenced its disconnection of customers.

COMPLAINTS

Customer complaint data provides an insight into customers' experience with the retail energy market.

The energy industry's call centre performance showed significant improvement during 2013-14. Data shows that retailers were generally able to respond to calls received in a far more timely manner than in 2012-13.

Total calls to retailers decreased by 6 per cent to 7.2 million in 2013-14, down from 7.6 million in 2012-13. This year, 69 per cent of calls were answered by an operator within 30 seconds — an increase from 63 per cent in 2012-13. In 2013-14, 5.3 per cent of callers abandoned their call while waiting for an operator to respond, down from 6.7 per cent in 2012-13, while customers spent an average of 73 seconds waiting for an operator — much lower than the average of 104 seconds in 2012-13.

While the total number of calls to retailers declined by 6 per cent, the number of complaints rose markedly in 2013-14. Total electricity complaints increased from 178 031 to 251 121 — up 41 per cent, following a 42 per cent increase in the previous year. Gas complaints also increased by 41 per cent (to 84 776) in 2013-14 after a 113 per cent increase in 2012-13. The majority of complaints in 2013-14 related to billing issues such as overcharging, prices, payment terms and methods, and debt recovery practices.

Despite the increase in retailer reported complaints in 2013-14, the Energy and Water Ombudsman reported a 2 per cent decrease in total complaints investigated. This may suggest that in response to the very significant growth in complaints in recent years, retailers are investing in directly resolving customer concerns (thereby avoiding customers turning to the Ombudsman for assistance).

WHERE TO FROM HERE?

As is often the case with our annual Customer Service performance reports, this year's report provides new insights and provokes new questions about the Victorian retail energy market.

Many indicators suggest that retailers are taking a much more active approach to assisting customers encountering difficulties in paying their energy bills, which is encouraging. Nevertheless, there are also signs of on-going (and increasing) customer dissatisfaction and the continuous increase in the rate of customer disconnections is confronting.

Through our upcoming Review of Energy Customer Disconnections, the Commission will be seeking to find the answers to many of the questions generated by this year's performance report. We will be inquiring into the nature and level of energy customer disconnections in Victoria. The review will also inquire into the principal causes of the higher disconnection activity and assess recent trends in wrongful disconnections. We will also investigate whether the rise in disconnections is linked to energy retailers' processes and procedures.

In particular, the review will consider how to ensure that bill payment arrangements are realistic and sustainable. The review will also consider how hardship program obligations may be designed more efficiently and whether amendments are required to the regulatory framework to ensure that vulnerable customers receive the assistance they need to avoid disconnection wherever possible.

We have already commenced discussions with stakeholders in order to better understand the matters of concern and how those concerns might best be addressed. An issues paper will be released in early 2015 and a draft report will follow mid-year. Following the release of each of these reports, the Commission will consult widely and publicly to ensure that all views are represented.

1 ABOUT OUR REPORT

1.1 OVERVIEW

The Essential Services Commission (the Commission) has reported on the performance of Victorian energy retailers since the mid-1990s. These reports bring transparency to the performance of energy retailers. Focusing on indicators that show how retailers operate and treat their customers provides a better understanding of the Victorian competitive energy market. The Commission conducts trend analysis over time and compares how well retailers provide services to their customers.

The Commission particularly takes note as to how retailers deal with vulnerable customers, such as those experiencing short or long term difficulties with paying their bills. These customers may be less confident in negotiating their options and pursuing their rights with their energy retailer. The Commission monitors the assistance that retailers provide to ensure these customers stay connected to supply.

In a separate report, *Energy retailers comparative performance report—pricing 2013-14*, the Commission outlined the prices of standing and market offer products available to Victorian consumers. That report presented electricity and gas costs over time, and compared retailers' tariffs in each distribution zone in the state. It is available from the Commission website (www.esc.vic.gov.au).

1.2 WHAT THIS REPORT COVERS

This report provides information on the following areas of performance in the Victorian gas and electricity market:

- Chapter 2, 'Energy markets', provides an overview of the level of competition in Victorian energy markets, including the market share of retailers and the rates at which consumers switch between retailers.
- Chapter 3, 'Financial hardship', evaluates the effectiveness of retailers' policies and payment plans in assisting customers in financial hardship. State funded relief grants and concessions available to those customers are also examined.
- Chapter 4, 'Disconnections and reconnections', examines the credit management policies of retailers by reporting the rates of disconnection of customers for non-payment of bills, and their reconnection. In particular, the chapter focuses on those rates for customers with financial difficulties.
- Chapter 5, 'Call centre performance and complaints', considers customers' satisfaction with the retail service by reporting retailers' accessibility and responsiveness to customer enquiries and complaints.

The *Electricity Industry Act 2000 (Vic)* and the *Gas Industry Act 2001 (Vic)* require energy retailers to comply with service standards and procedures. These service standards and procedures are set out primarily in regulatory instruments, including the Energy Retail Code and the Code of Conduct for Marketing Retail Energy in Victoria. The performance indicators that retailers are required to report to the Commission are set out in full in the *Energy Retail Performance Indicators – Effective 2013-14*. The codes and the performance indicators are available on the Commission's website (www.esc.vic.gov.au).

The data in this report is primarily collected by the Commission directly from energy retailers. Additional data is obtained from the Energy and Water Ombudsman (Victoria) (EWOV), relevant state and territory government departments, the Australian Energy Regulator (AER) and the Department of Human Services (DHS). Before publishing this report, it was circulated to all retailers for comment, and their comments have been included where appropriate.

2 ENERGY MARKETS

WHAT WE FOUND

The electricity market in Victoria is among the most active in Australia, with Victoria recording the highest rate of consumer switching between retailers, with 28 per cent of Victorian consumers transferring in the electricity market during 2013-14.

The Commission notes the high level of engagement with the energy market, particularly for residential customers, demonstrated by just 11 per cent of residential electricity customers remaining on a standing offer. 89 per cent of electricity customers have elected to take up a market offer, which may provide the consumer with discount prices if they can meet certain conditions. 74 per cent of small businesses have taken up a market offer.

The gas market in Victoria also remains active, with 24 per cent of consumers changing retailers during 2013-14. Retailer data shows that only 13 per cent of residential gas consumers remain on standing offer tariffs, while 28 per cent of small businesses are on standing offers.

2.1 OVERVIEW

The Victorian Government deregulated energy prices for all energy customers from 1 January 2009. All energy retailers now set their own retail prices. Victoria has 33 licensed electricity retailers, of which 23 were active in the electricity market for residential and business customers in 2013-14 (table 2.1) Some of these retailers have a long history in the previously franchised market — namely, AGL, EnergyAustralia (formerly known as TRUenergy), and Origin Energy. These three retailers are collectively referred to in this report as ex-local retailers, while the remainder have entered the market after it opened to competition.

2.2 MARKET CHANGES

The energy market is continually evolving, with retailers consolidating their market position through a range of mergers and acquisitions. These include:

- Origin Energy purchased the retail business and existing customer base of Country Energy on 1 March 2011.
- TRUenergy purchased the retail business and existing customer base of EnergyAustralia on 1 March 2011 – it then changed its name to EnergyAustralia.
- Alinta Energy purchased the retail business of Neighbourhood Energy in November 2011. However, as at 30 June 2014, Neighbourhood continue to supply some customers.
- AGL completed the purchase of Australian Power & Gas in April 2014. Australian Power & Gas' results are included in this report as they operated during the reporting period.
- Snowy Hydro (the owner of Red Energy) completed the purchase of the retail business of Lumo Energy on 30 September 2014. Snowy Hydro has indicated that it will maintain the two separate retail brands of Lumo Energy and Red Energy.

Where appropriate, historical data remains in the report for retailers that no longer provide services to Victorian customers.

The market share profile of retailers has changed significantly in the electricity sector since competition was introduced in the early 2000s. At that time, the three local retailers—AGL, EnergyAustralia (formerly TRUenergy) and Origin Energy—held between them 100 per cent of the residential and business market share.

2.3 ELECTRICITY MARKET

The electricity market in Victoria is very active, with the Australian Energy Market Operator (AEMO) recording that 28 per cent of Victorian accounts were transferred from one retailer to another during 2013-14. This is the highest rate of transferred accounts in Australia.

(In the Progress of Electricity Retail Competition in Victoria report¹, we highlighted that care should be taken before citing transfer numbers as an indication of active consumer engagement with the market. While transfer figures include customers actively switching to an alternative retailer, they also include situations where one customer moves out of a premises and another moves in, as well as meter installations associated with new dwellings. These latter two kinds of ‘transfers’ are not relevant to the rate at which customers elect to switch between retailers. For example, in that earlier report the Commission estimated the rate of ‘active switching’ in 2011-12 was approximately 17 per cent, compared to the 26 per cent rate of transfers reported by AEMO in that year.)

According to the data supplied by retailers, only 11 per cent of residential customers (and 26 per cent of small businesses) remain on standing offers with the rest having moved to a market offer, which may provide the customer with discounted prices.² This figure is considerably lower than estimates reported elsewhere. As this is the first year we have collected this data, the Commission will undertake further work to confirm the accuracy of this finding.

¹ Essential Services Commission 2013, *Progress of Electricity Retail Competition in Victoria: Research Paper*, May 2013

² Essential Services Commission 2014, *Energy retailers comparative performance report—pricing 2013-14*, October 2014 and Essential Services Commission 2014, *Energy retailers comparative performance report – pricing 2013-14, Supplementary report for electricity flexible prices*, December 2014

Customer numbers are calculated as an average of the number of customers held on the last day of each month of the reporting period, rather than as at 30 June 2014. This enables a more accurate calculation of metrics which are calculated per customer, such as disconnections per 100 customers.

Table 2.1 shows:

- in the residential electricity market, AGL, Origin Energy and EnergyAustralia hold 64 per cent market share in 2013-14, down from 69 per cent in 2012-13
- taking into account AGL's ownership of AGL Sales, Powerdirect and its purchase of Australian Power and Gas; Origin Energy's ownership of Sun Retail; and EnergyAustralia's ownership of EnergyAustralia Yallourn, the 'big three' have a combined market share of 70 per cent of residential electricity customers in 2013-14
- Simply Energy and Alinta Energy had the largest increases in residential market share, increasing by more than 1 per cent
- in the electricity market for small and large business customers, AGL, Origin Energy and EnergyAustralia hold 61 per cent market share in 2013-14, but this increases to 70 per cent of market share once related companies are included
- in the business market, AGL, EnergyAustralia and Lumo Energy lost market share, while Momentum Energy increased its market share by over 3 per cent.

**TABLE 2.1 AVERAGE CUSTOMER NUMBERS, ELECTRICITY
2013-14**

Retailer	Residential	Small Business	Large Business	Total	Market Share %	Market share +/-
AGL	487 966	41 470	11 485	540 921	20.3	-2.2
AGL Sales (Qld)	0	14	101	115	0.0	0.0
Alinta Energy	47 474	228	175	47 877	1.8	1.3
Aurora Energy	0	0	7	7	0.0	0.0
Australian Power & Gas	97 474	1	2	97 477	3.7	-0.8
Blue NRG	83	2 361	989	3 433	0.1	0.1
Click Energy	25 978	771	166	26 915	1.0	0.5
Diamond Energy	2 294	146	24	2 464	0.1	0.0
EnergyAustralia	505 264	45 275	8 146	558 685	21.0	-2.4
EnergyAustralia Yallourn	0	0	2 103	2 103	0.1	0.0
ERM Business Energy	0	254	2 948	3 202	0.1	0.0
Lumo Energy	188 882	12 534	1 761	203 177	7.6	0.0
M2 Energy*	34 909	654	133	35 696	1.3	0.4
Momentum	35 932	29 363	17 997	83 292	3.1	1.2
Neighbourhood Energy	31 665	0	0	31 665	1.2	-1.1
Origin Energy	507 359	73 755	10 835	591 949	22.2	-0.3
Pacific Hydro	0	0	28	28	0.0	0.0
People Energy	5 279	131	21	5 431	0.2	0.2
Powerdirect	35 275	15 984	9 292	60 551	2.3	0.6
Powershop	3 972	294	46	4 312	0.2	0.1
QEnergy	776	593	93	1 462	0.1	0.1
Red Energy	192 884	6 953	1 962	201 799	7.6	0.8
Simply Energy	144 990	11 379	2 348	158 717	6.0	1.5
Sun Retail	5	27	9	41	0.0	0.0
TOTAL	2 348 461	242 187	70 671	2 661 319		

* Note: M2 Energy trades as Dodo Power & Gas and Commander Power & Gas.

Small businesses have an annual electricity consumption of less than 40 megawatt hours (MWh) per annum

2.4 GAS MARKET

Competition in the gas market in Victoria also remains active, with 24 per cent of consumers changing retailers during 2013-14. Retailer data shows that only 13 per cent of residential gas consumers remain on standing offer tariffs, while 28 per cent of small businesses are on standing offers.

Table 2.2 shows:

- Alinta Energy and Simply Energy reported the largest market share increase in 2013-14, both gaining more than 1 per cent of the total gas market.
- EnergyAustralia and Origin Energy reported the largest decrease in market share, losing 2.5 per cent and 1.4 per cent respectively.
- The combined market share of customers for the ex-local gas retailers decreased by 4.2 per cent in 2013-14, down to 72 per cent.

**TABLE 2.2 AVERAGE CUSTOMER NUMBERS, GAS
2013-14**

Retailer	Residential	Small Business	Large Business	Total	Market Share %	Market Share +/-
AGL Sales	479 766	14 509	1 231	495 506	26.4	-0.3
Alinta Energy	30 204	3	0	30 207	1.6	1.2
Aurora Energy	0	0	3	3	0.0	0.0
Australian Power & Gas	88 276	0	0	88 276	4.7	-0.7
EnergyAustralia	440 042	14 600	1 394	456 036	24.3	-2.5
Lumo Energy	146 529	1 668	64	148 261	7.9	0.6
M2 Energy*	18 453	0	0	18 453	1.0	0.7
Origin (Gas)	387 238	15 651	875	403 764	21.5	-1.4
Red Energy	116 838	2 966	17	119 821	6.4	0.9
Simply Energy	112 051	2 540	133	114 724	6.1	1.4
TOTAL	1 819 397	51 937	3 717	1 875 051		

* Note: M2 Energy trades as Dodo Power & Gas and Commander Power & Gas.

Small businesses have an annual gas consumption of less than 1 000 gigajoules (GJ) per annum

3 FINANCIAL ASSISTANCE

WHAT WE FOUND

Corresponding with the increase in electricity disconnections reported this year, overall participation in retailers' hardship programs also increased in 2013-14.

On first glance, increased participation by consumers in hardship programs can be viewed as an indicator of greater consumer financial stress. However, the Commission notes that this may be a positive development, as the increasing ability of retailers to provide assistance through hardship programs, and a corresponding willingness by consumers to engage with energy retailers may, in the longer term, enable consumers facing hardship to receive the appropriate assistance that they require.

Program participation increased by 9 317 participants in 2013-14 — up from 24 356 to 33 673, an increase of 38 per cent. A total of 0.81 per cent of residential customers for gas and electricity participated in hardship programs in 2013-14, up from 0.57 per cent in 2012-13. 71 per cent of hardship program participants were concession card holders, the same percentage as in 2012-13.

In 2013-14, retailers disconnected 4.7 per cent of customers who had participated in a hardship program in the previous 12 months, up from 3.8 per cent in the previous year. Similarly, 2.2 per cent of customers who were previously in a hardship program were reconnected in 2013-14, up from 1.8 per cent in 2012-13. These disconnection and reconnection rates are similar to those reported in 2011-12, after a fall in 2012-13.

Expenditure on energy concessions for low income customers levelled off in 2013-14 (\$230.6 million) after three years of large increases.

However, the value of electricity grants approved by DHS under the Utility Relief Grant Scheme increased in 2013-14 to \$8.35 million, up 31 per cent from 2012-13. Similarly, the value of approved gas grants also increased in 2013-14. The total grant value for gas was \$4.74 million, up 23 per cent.

The number of instalment payment plans increased in 2013-14 for both gas and electricity, after a fall in 2012-13. For electricity, the number of instalment payment plans increased to 3.61 per 100 customers from 2.63 in 2012-13. Gas results also increased to 3.41 per 100 customers in 2012-13, up from 2.29 in 2012-13. Overall, 16 per cent of customers on an instalment payment plan were in a hardship program, although this figure varied substantially between retailers.

3.1 WHY REPORT THESE INDICATORS?

Victorian energy retailers must assist customers to stay connected to electricity and gas supply by offering payment assistance, hardship programs and access to government concessions and grants. Some initiatives reported here are governed by legislative and regulatory requirements, while others are specific programs and assistance that retailers voluntarily offer to their customers. The initiatives include:

- payment programs (instalment payment plans) to assist customers with short or long term financial difficulties
- Victorian Government energy concessions and financial grants to help low income individuals and families pay their energy bills
- energy field audits to identify possible ways to save energy.

The indicators in this section give information on how retailers helped customers via their financial hardship programs and instalment payment plans. Information is also provided on government funded concessions and grants. This report does not cover the rebate scheme (run by Sustainability Victoria) for energy efficient appliances for low income households. For details of this rebate, go to www.resourcesmart.vic.gov.au.

3.2 RETAILERS' FINANCIAL HARDSHIP PROGRAMS

Energy customers' overall participation in retailers' hardship programs increased in 2013-14. Table 3.1 shows the industry-wide data that the Commission collected for financial hardship programs in 2013-14, and compares that performance with 2012-13 and 2011-12:

- Program participation increased by 9 317 participants in 2013-14 — up from 24 356 to 33 673, an increase of 38 per cent. A total of 0.81 per cent of residential customers for gas and electricity participated in hardship programs in 2013-14, up from 0.57 per cent in 2012-13.
- 71 per cent of hardship program participants were concession card holders in 2013-14, the same percentage as in 2012-13. Therefore, 29 per cent of hardship program participants were not concession card holders.

- The number of customers denied access to a retailer's hardship program fell slightly, from 801 in 2012-13 to 750 in 2013-14.
- The average time that customers spent in a hardship program fell to 265 days in 2013-14, down from 382 days in 2012-13.
- 17 656 participants exited a hardship program in 2013-14, and of these 51 per cent left because they did not comply with the terms. 25 per cent of participants exited by changing retailers, while 23 per cent exited by agreement with their retailer.
- The average debt on entry to a hardship program increased to \$1 034 in 2013-14, up from \$742 in 2012-13. In 2013-14, and for the first time, the Commission has collected information on the average debt of all participants in hardship programs, which in 2013-14 was \$1370.
- 39 per cent of hardship program entrants had a debt of under \$500, a further 38 per cent had a debt of between \$501 to \$1500, 12 per cent had a debt of between \$1501 and \$2500, while 11 per cent of program entrants had a debt of over \$2500.
- 1 234 small appliances (eg. light globes) were provided to customers under a hardship program in 2013-14, while 4 large appliances (eg. refrigerators) were supplied.
- Only two retailers (Origin Energy and Neighbourhood Energy) reported undertaking energy field audits in 2013-14. They provided 464 energy audits at no cost to the customer. Some other retailers were unable to provide information on this metric, citing privacy restrictions on behalf of their energy auditors. The Commission expects that further information on this metric should be forthcoming in future reports.

TABLE 3.1 RETAILERS' FINANCIAL HARDSHIP PROGRAMS – SUMMARY
2011-12 to 2013-14

	2011-12	2012-13	2013-14
Hardship program participants (total)	18 879	24 356	33 673
Hardship program participants who were concession cardholders (monthly average)	8 000	7 941	12 400
Customers denied access to a retailer's hardship program during the period	414	801	750
Average debt of new entrants to a hardship program (\$)	919	742	1 034
Average debt of customers in a hardship program (\$)	na	na	1 371
Average length of customers' participation in a hardship program (days)	504	363	269
Participants exiting a hardship program by agreement with the retailer	3 806	4 463	3 871
Hardship program participants excluded for not complying with requirements	3 577	6 400	9 022
Participants exiting a hardship program by switching retailers	na	na	4 329
Disconnections of previous participants within 12 months of leaving a hardship program	884	935	1 569
Reconnections of previous participants within 12 months of leaving a hardship program	403	445	726
Energy field audits provided at no cost to customer	917	524	464
Appliances provided under a hardship program	580 ^a	142 ^a	Small: 1 234 Large: 4

^a Data prior to 2013 included light globes for AGL, which were excluded from data from January 2013. From 1 July 2013, light globes are included as "small appliances".

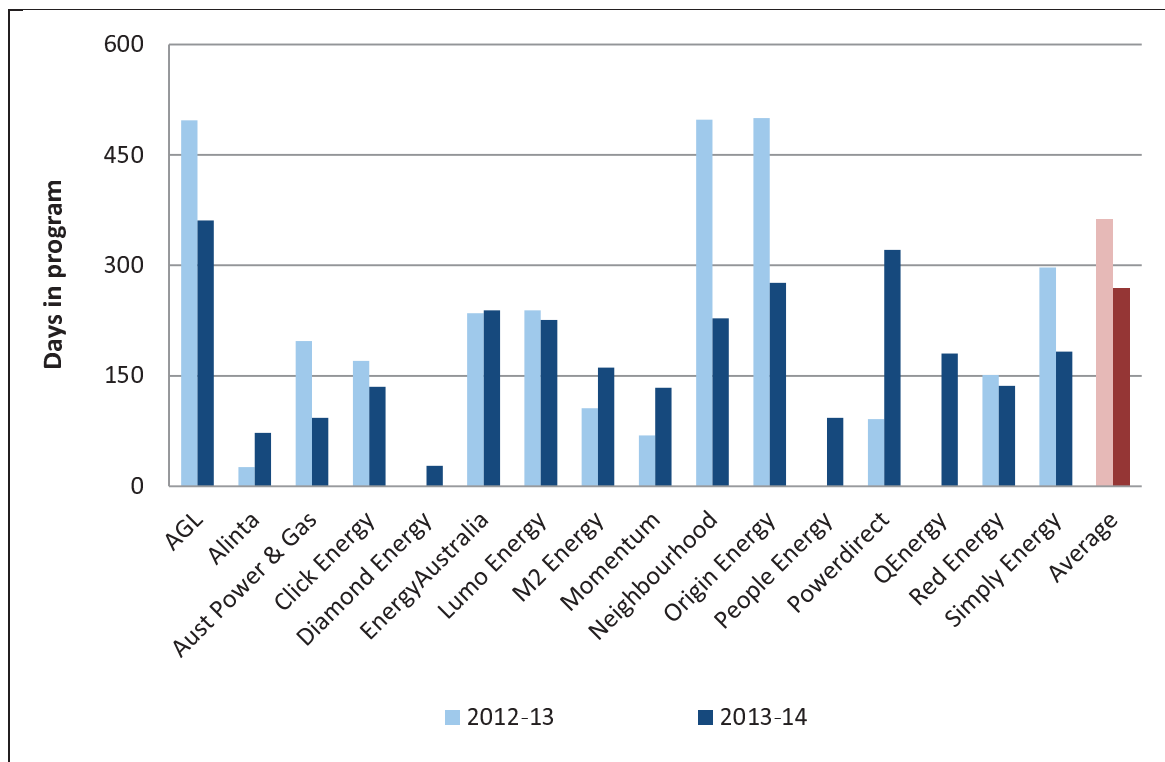
Table 3.2 contains individual retailers' reported data. Individual retailer performance varied in 2013-14, but most retailers reported an increase in hardship program participants in 2013-14. Overall, participation rose by 38 per cent. Higher debt levels on entry and higher disconnection rates than in 2012-13 may be an indication of a comparatively higher level of financial stress on hardship customers.

TABLE 3.2 RETAILERS' HARDSHIP PROGRAM SUMMARY
2013-14

Retailer	Hardship program participants	Hardship program participants per 100 customers	Concession cardholders	Customers denied access	Average debt of new entrants (\$)	Average length of participation (days)	Exit by agreement with retailer	Excluded for not complying with requirements	Disconnections of previous hardship customers	Reconnections of previous hardship customers
AGL Sales	9,731	1.01	4,196	224	1,430	361	777	2,721	770	424
Alinta Energy	491	0.63	15	0	1,038	73	272	3	3	4
Australian Power & Gas	953	0.51	81	14	1,035	93	464	489	205	56
Click Energy	343	1.32	50	0	341	135	336	3	56	0
Diamond Energy	2	0.09	0	0	967	28	0	0	0	0
EnergyAustralia	7,592	0.80	2,548	8	1,107	239	752	1,863	21	0
Lumo Energy	2,977	0.89	1,238	0	585	226	423	776	187	99
M2 Energy	480	0.90	149	0	684	161	18	49	1	0
Momentum	246	0.68	66	52	947	134	44	95	15	15
Neighbourhood Energy	143	0.45	32	0	1,619	228	17	74	0	12
Origin Energy	5,459	0.61	2,302	0	1,026	276	384	1,186	0	0
People Energy	20	0.38	7	9	437	93	2	2	0	0
Powerdirect	206	0.58	98	0	1,649	321	19	50	0	0
QEnergy	14	1.80	4	0	400	90	0	0	0	0
Red Energy	2,033	0.66	581	29	254	136	357	884	184	47
Simply Energy	2,983	1.16	1,051	414	866	183	272	809	130	73

Figure 3.1 shows that the average time participants spent in a financial hardship program varied greatly across retailers in 2013-14. It ranged from 28 days (Diamond Energy) to 361 days (AGL). On average, customers spent less time in a hardship program than in 2012-13. Data includes customers still in a program as at 30 June 2014.

FIGURE 3.1 FINANCIAL HARDSHIP PROGRAMS — AVERAGE LENGTH OF PARTICIPATION
Electricity and gas, 2012-13 and 2013-14



3.3 VICTORIAN GOVERNMENT FINANCIAL ASSISTANCE

The Victorian Government operates programs to improve the affordability of essential services for low income individuals and families in Victoria. These programs include energy concessions and the Utility Relief Grant Scheme (URGS). All retailers must assist customers to gain access to the programs, which the Department of Human Services (DHS) administers. This section outlines the amount of financial assistance provided.

3.3.1 CONCESSIONS

Table 3.3 shows the total government expenditure on energy concessions for 2009-10 to 2013-14, as reported by DHS. Expenditure on energy concessions for low income customers levelled off in 2013-14 after three years of large increases. Expenditure on the off-peak concession and the annual energy concession for gas declined in 2013-14, while the service to property charge concession and the annual electricity concession for electricity both increased slightly.

TABLE 3.3 TOTAL EXPENDITURE ON CONCESSIONS
Electricity and gas, 2009-10 to 2013-14

Concession	2009-10 \$m	2010-11 \$m	2011-12 \$m	2012-13 \$m	2013-14 \$m
Off-peak concession (electricity)	7.5	7.6	8.5	12.2	9.9
Service to property charge concession (electricity)	5.8	3.5	5.6	6.4	7.9
Annual energy concession (electricity)	55.5	90.7 ^a	135.4	150.2	154.5
Annual energy concession (gas)	44.7	59.3 ^a	54.2	62.0	58.3
Total	113.5	161.1	203.7	230.8	230.6

^a Includes extension to the winter energy concession from 1 March 2011 (now the annual energy concession).

Data source: DHS

3.3.2 UTILITY RELIEF GRANT SCHEME

The URGS provides financial assistance to low income customers who are having difficulties paying their utility bill, and as a result may be at risk of disconnection. Energy retailers initiate the process by sending an application form to the customer and by supplying their billing information to DHS. The customer sends the completed application to DHS, which then assesses the customer's eligibility for the grant.

Tables 3.4 and 3.5 show scheme details for 2013-14:

- Of 57 032 electricity and gas URGS applications initiated by retailers, only 33 473 customers (59 per cent) subsequently submitted their applications to DHS for approval — the same proportion as in 2012-13.
- The number of electricity grants approved by DHS increased in 2013-14. The total grant value was \$8.35 million, up 31 per cent from \$6.35 million in 2012-13. The average grant was \$453, up from \$447 in 2012-13. Overall, DHS approved 93 per cent of applications.
- Similarly, the number of approved gas grants also increased in 2013-14. The total grant value was \$4.74 million, up 23 per cent from \$3.85 million in 2012-13. The average grant was \$422, a minor change from \$421 in 2012-13. Overall, DHS approved 91 per cent of applications.

TABLE 3.4 UTILITY RELIEF GRANTS — ELECTRICITY
2013-14

Retailer	Customers provided with grant forms (no.)	Applications sent to DHS by customers (no.)	Grants approved (no.)	Average grant amount (\$)
AGL Sales	8 734	5 076	4 322	437
Alinta Energy	1 057	527	431	456
Australian Power & Gas	3 049	1 894	1 705	461
Click Energy	467	233	204	463
Diamond Energy	4	3	1	500
EnergyAustralia	6 642	3 996	3 572	460
Lumo Energy	1 670	1 205	1 109	479
M2 Energy	160	90	76	459
Momentum Energy	189	130	106	438
Neighbourhood Energy	681	373	336	470
Origin Energy	7 060	3 864	3 525	452
People Energy	15	6	4	459
Powerdirect	385	224	182	457
QEnergy	5	3	3	378
Red Energy	2 726	1 683	1 544	450
Simply Energy	2 566	1 506	1 315	451
Total	35 410	20 813	18 435	453

TABLE 3.5 UTILITY RELIEF GRANTS — GAS
2013-14

Retailer	Customers provided with grant forms (no.)	Applications sent to DHS by customers (no.)	Grants approved (no.)	Average grant amount (\$)
AGL	6 091	3 570	3 102	410
Alinta Energy	585	289	228	431
Australian Power & Gas	2 262	1 415	1 264	439
EnergyAustralia	4 396	2 632	2 364	431
Lumo Energy	1 327	948	875	452
M2 Energy	46	20	19	446
Origin Energy	3 842	2 052	1 854	416
Red Energy	1 304	744	672	409
Simply Energy	1 769	990	848	407
Total	21 622	12 660	11 226	422

3.4 INSTALMENT PAYMENT PLANS

Retailers must offer an instalment payment plan to residential customers who experience difficulties paying their bills. This plan allows a customer to pay by regular instalments, so they can reduce debt over a specified time. Ideally, this indicator should not include customers who choose instalment payment plans to smooth incoming bills (eg. monthly payments to ensure the customer will not have large quarterly bills). However, some retailers reported difficulties separating customers who use the payment plans to pay arrears from those who use the plans for convenience.

The Commission accepts it is not always possible to distinguish the two groups, and has allowed retailers to include both groups in their reported data. As a result, some retailers have only reported numbers of customers that are on an instalment plan that includes an arrears component, and have not included all customers that are on a flexible payment arrangement.

The number of customers on instalment payment plans increased in 2013-14 for both gas and electricity, after a fall in 2012-13. Tables 3.6 and 3.7 show the following details:

- For electricity, the number of instalment payment plans per 100 customers increased to 3.61 per 100 customers from 2.63 in 2012-13. Gas instalment payment plans also increased to 3.41 per 100 customers in 2012-13, up from 2.29 per 100 customers in 2012-13.
- Each of the three largest retailers contributed to the increase in instalment payment plans in 2013-14, all reporting a significant increase for both electricity and gas.
- To further analyse which customers are using instalment payment plans, in 2013-14 retailers have for the first time reported the number of customers on an instalment payment plan disaggregated for whether they are in a hardship program. Retailers reported that overall, 16 per cent of customers on an instalment payment plan were in a hardship program. However, results varied significantly between retailers; for example AGL reported that 65 per cent of its instalment plans were entered into by customers in a hardship program, while for EnergyAustralia the same measure was just 4 per cent.

TABLE 3.6 INSTALMENT PAYMENT PLANS – ELECTRICITY
2011-12 to 2013-14

Retailer	2013-14 Average number of instalment payment plans per month		Instalment payment plans per 100 customers		
	Hardship	Non-hardship	2011-12	2012-13	2013-14
AGL	4 954	2 716	0.36	0.35	1.58
Alinta Energy	11	1 319	—	0.81	2.80
Australian Power & Gas	331	3 093	2.60	3.37	3.51
Click Energy	15	348	0.82	0.81	1.40
Diamond Energy	0	9	—	0.52	0.39
EnergyAustralia	1 618	37 478	5.50	4.92	7.74
Lumo Energy	904	4 020	3.14	2.91	2.61
M2 Energy	209	3	0	0.04	0.61
Momentum	80	181	0.12	0.40	0.72
Neighbourhood Energy	44	255	0.89	4.39	0.95
Origin Energy	3 516	13 068	6.74	1.95	3.27
People Energy	7	0	—	—	2.38
Powerdirect	3	119	0.46	0.11	0.12
QEnergy	4	0	—	—	0.52
Red Energy	697	4 019	3.32	2.63	2.44
Simply Energy	850	4 882	6.35	4.87	3.96
Electricity total	13 243	71 550	3.91	2.63	3.61

TABLE 3.7 INSTALMENT PAYMENT PLANS – GAS
2011-12 to 2013-14

Retailer	2013-14 Average number of instalment payment plans per month		Instalment payment plans per 100 customers		
	Hardship	Non-hardship	2011-12	2012-13	2013-14
AGL	4 388	1 273	0.23	0.19	1.18
Alinta Energy	5	601	0.00	0.50	2.01
Australian Power & Gas	243	2 180	1.91	2.52	2.75
EnergyAustralia	935	30 982	5.49	4.34	7.25
Lumo Energy	782	3 436	3.53	3.26	2.87
M2 Energy	55	0	—	—	0.30
Origin Energy	1 687	8 733	6.34	1.56	2.70
Red Energy	381	2 011	2.72	2.37	2.05
Simply Energy	613	3 658	5.69	4.43	3.81
Electricity total	9 089	52 874	3.78	2.29	3.41

4 DISCONNECTIONS AND RECONNECTIONS

WHAT WE FOUND

The residential electricity disconnection rate increased this year to 1.47 per 100 customers, up from 1.07 in 2012-13. Over 34 000 customers were disconnected in 2013-14 (up 36 per cent from 2012-13). The disconnection rate for gas customers also increased this year. Retailers reported 1.33 disconnections per 100 customers, up from 0.89 per 100 customers in 2012-13 (an increase of 42 per cent).

The Commission is concerned at the increase in the number of disconnections in 2013-14, and will investigate the issues surrounding disconnection and hardship in the Victorian energy industry. While the responsibility to stay connected is a shared one, the Commission is concerned with ensuring that retailers are applying hardship policies and procedures in a way that would minimise the likelihood of disconnection.

48 per cent of all disconnected electricity customers were reconnected within seven days at the same address and with the same name in 2013-14, down from 50 per cent in 2012-13. For gas, 35 per cent of customers were reconnected at the within seven days — down from 46 per cent in 2012-13.

The Commission notes that the rate of reconnection for electricity customers is again close to 50 per cent, meaning that half of disconnected customers quickly engage with their retailer in order to arrange for reconnection of electricity. Gas customers are less likely to arrange for reconnection within seven days.

The electricity disconnection rate for business customers increased in 2013-14, to 2.19 per 100 customers from 0.91 per 100 in 2012-13. Business gas customers also recorded an increased disconnection rate in 2013-14, up to 1.17 per 100 customers from 0.60 per 100 in 2012-13.

The 2013-14 reconnection rates for businesses increased in line with the disconnection rate. Electricity reconnections increased from 0.29 to 0.86 per 100 customers, and gas reconnections increased from 0.19 per 100 customers to 0.40 in 2013-14.

4.1 WHY REPORT THESE INDICATORS?

Disconnecting customers who fail to pay outstanding accounts should be a last resort for retailers. Retailers must help customers who show indicators of financial stress avoid disconnection by assessing them for inclusion in their hardship programs, offering reasonable payment plans and government assistance, and providing access to financial counsellors and energy efficiency advice.

A key indicator of the success of this assistance is the number of customers disconnected and reconnected in the same name at the same address. These reconnections often indicate customers who may be struggling with their payments, rather than those who leave the address without paying their accounts. However, not all customers who are disconnected are financially distressed. Gathering more detailed data on disconnected and reconnected customers provides insights into those who may be experiencing hardship, including:

- customers previously on an instalment payment plan
- concession card holders, and
- customers disconnected on at least one other occasion during the previous 24 months.

Comparing Victoria's disconnection data against historical trends and disconnection data in other jurisdictions also helps us compare the performance of the energy retailers.

4.2 DISCONNECTIONS OVER TIME AND ACROSS JURISDICTIONS

This section provides information on disconnection rates for all electricity and gas customers, to show the long term performance of the industry in both the public and private sectors. Table 4.1 details disconnection and reconnection rates for the past five years. Notably, it shows that in 2013-14, disconnections increased for both electricity and gas customers. Figure 4.1 shows that the rate of electricity and gas disconnection reached a low in 2005-06 and has been increasing since, and is now approaching the historically high rates of the 1990s.

TABLE 4.1 DISCONNECTIONS IN VICTORIA — RESIDENTIAL
2009-10 to 2013-14

	2009-10	2010-11	2011-12	2012-13	2013-14
Electricity disconnections	13 486	17 871	23 805	25 254	34,448
Disconnections per 100 customers	0.59	0.77	1.02	1.07	1.47
Gas disconnections	15 473	13 741	20 483	16 979	24 178
Disconnections per 100 customers	0.85	0.74	1.13	0.90	1.33

FIGURE 4.1 DISCONNECTIONS AND RECONNECTIONS IN VICTORIA—RESIDENTIAL AND BUSINESS
Electricity and gas, 1990 to 2013-14

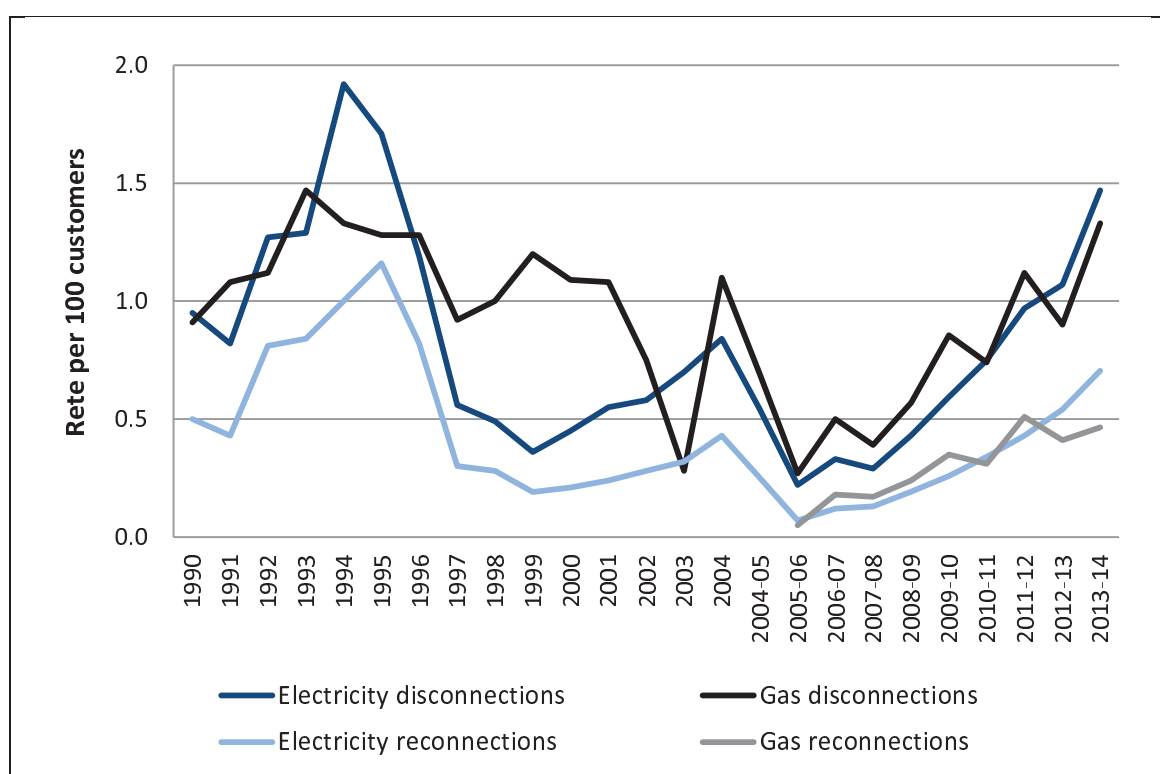


Table 4.2 shows the electricity disconnection rates for each Australian jurisdiction for the past five years. It shows that while disconnection rates have generally increased across Australia, the pace of this increase has been highest in Victoria. As a result, Victoria's disconnection rate is now the highest in Australia.

TABLE 4.2 DISCONNECTIONS, BY JURISDICTION — RESIDENTIAL ELECTRICITY
Per 100 customers, 2009-10 to 2013-14

Jurisdiction	2009-10	2010-11	2011-12	2012-13	2013-14
Victoria	0.59	0.77	1.02	1.07	1.47
New South Wales	0.60	0.61	0.80	0.83	1.03
ACT	0.56	0.26	na	0.05	0.17
South Australia	0.66	1.01	1.35	1.50	1.37
Queensland	0.90	1.22	1.16	0.94 ^a	1.31 ^a
Tasmania	0.59	0.51	0.08	0.46	0.68
Western Australia	0.39	0.90	0.87	0.72	0.97

^a The Department of Energy and Water Supply calculated this ratio, based on information published by the Queensland Competition Authority. Queensland data may be marginally higher than reported, because the small market customer numbers include both small residential and small business customers.

na – Not available.

Data sources: Independent Pricing and Regulatory Tribunal (NSW) (IPART), Essential Services Commission of South Australia (ESCOSA), Economic Regulation Authority (WA) (ERA), Department of Energy and Water Supply (Qld) (DEWS), Australian Energy Regulator (AER).

4.3 RESIDENTIAL DISCONNECTIONS AND RECONNECTIONS

This section provides information on the rates of disconnection and reconnection for Victorian residential electricity and gas customers in 2013-14. It also compares these rates with retailers' 2012-13 performance and looks at trends in disconnection and reconnection of customers who show indications of financial distress.

Reconnections are fewer than disconnections as the reconnection measure is specific to customers reconnected in the same name and at the same address within seven days. This measure is not designed to count customers who have moved out or 'skipped' on their bill, but rather customers who were likely to be experiencing difficulty in paying their bill, and subsequent to their disconnection contacted their retailer to be reconnected within seven days of the disconnection.

Tables 4.3, 4.4, 4.5 and 4.6 show the following results:

- The residential electricity disconnection rate increased this year to 1.47 per 100 customers, up from 1.07 in 2012-13. Over 34 000 customers were disconnected in 2013-14 (up 36 per cent from 2012-13).
- The disconnection rate for gas customers also increased this year. Retailers reported 1.33 disconnections per 100 customers, up from 0.90 per 100 customers in 2012-13 (an increase of 42 per cent).
- 48 per cent of all disconnected electricity customers were reconnected within seven days at the same address and with the same name in 2013-14, down from 50 per cent in 2012-13.
- For gas, 35 per cent of customers were reconnected at the same address and with the same name — down from 46 per cent in 2012-13.

In 2013-14, and for the first time, the Commission has collected data on all customers reconnected within the reporting period, not just within seven days. This gives further insight into the reasons for disconnections and who is reconnected, and shows those disconnections that take time to resolve and be reconnected. When this further group of reconnections is included, the reconnection rate rises to 57 per cent for electricity and 41 per cent for gas. Looking closer, this implies that at least 15 per cent of electricity and gas reconnections are not resolved within a 7 day timeframe.

TABLE 4.3 DISCONNECTIONS — RESIDENTIAL ELECTRICITY
2012-13 and 2013-14

Retailer	Total disconnections		Disconnections per 100 customers		Reconnections in the same name within 7 days		All reconnections in the same name		Customers previously on an instalment payment plan		Customers with multiple disconnections within 24 months		Concession card holders	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
AGL	11 722	9 313	2.17	1.91	55	52	na	55	29	24	20	25	28	29
Alinta Energy	135	980	0.98	2.06	62	49	na	54	0	26	2	8	31	43
Australian Power & Gas	2 361	3 216	1.97	3.30	50	57	na	62	43	41	15	12	30	32
Click Energy	183	709	1.40	2.73	49	40	na	46	26	15	66	8	20	18
Diamond Energy	—	2	—	0.09	—	100	na	100	—	0	—	0	—	0
EnergyAustralia	467	904	0.08	0.16	40	15	na	50	0	3	0	0	0	13
Lumo Energy	255	1 427	0.14	0.76	33	25	na	28	34	19	12	8	36	9
M2 Energy	1	14	0.00	0.04	—	21	na	29	—	0	—	0	—	36
Momentum	120	291	0.79	0.81	50	50	na	62	28	23	39	15	16	19
Neighbourhood Energy	1 537	1,632	2.52	5.15	42	11	na	25	39	48	3	14	47	28
Origin Energy	4 484	9 699	0.87	1.91	46	51	na	63	22	19	2	2	1	20
People Energy	—	54	—	1.02	—	31	na	35	—	0	—	0	—	44
Powerdirect	112	219	0.52	0.62	46	56	na	65	1	0	1	12	28	28
QEnergy	—	8	—	1.03	—	63	na	63	—	0	—	13	—	0
Red Energy	2 578	2 200	1.47	1.14	46	52	na	57	23	22	16	18	24	28
Simply Energy	1 299	3 780	1.21	2.61	49	54	na	66	23	20	20	12	32	28
Electricity total	25 254	34 448	1.07	1.47	50	48	na	57	28	23	14	12	24	25

TABLE 4.4 DISCONNECTIONS — RESIDENTIAL GAS
2012-13 and 2013-14

Retailer	Total disconnections		Disconnections per 100 customers		Reconnections in the same name within 7 days		All reconnections in the same name		Customers previously on an instalment payment plan		Customers with multiple disconnections within 24 months		Concession card holders	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
AGL	8 650	5 883	1.71	1.23	50	41	na	47	30	24	20	34	33	
Alinta Energy	19	963	0.26	3.19	—	46	na	60	—	25	—	—	55	
Australian Power & Gas	2 506	3 922	2.36	4.44	49	45	na	39	36	37	16	31	28	
EnergyAustralia	328	921	0.07	0.21	30	10	na	61	1	2	0	0	6	
Lumo Energy	568	3 201	0.41	2.18	36	16	na	21	43	19	14	10	9	
M2 Energy	0	4	0.00	0.02	0	25	na	25	0	0	0	0	75	
Origin Energy	2 414	5 562	0.57	1.44	41	38	na	42	22	16	4	3	13	
Red Energy	1 298	1 071	1.25	0.92	43	46	na	59	23	23	20	17	33	35
Simply Energy	1 196	2 651	1.33	2.37	30	24	na	32	15	11	13	9	27	19
Gas total	16 979	24 178	0.90	1.33	46	35	na	41	28	21	16	11	28	23

TABLE 4.5 RECONNECTIONS — RESIDENTIAL ELECTRICITY
2012-13 and 2013-14

Retailer	Reconnections within 7 days		Reconnections within 7 days per 100 customers		All reconnections in the same name		Customers previously on an instalment payment plan		Customers with multiple disconnections within 24 months		Concession card holders	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
AGL	6 480	4 845	1.20	0.99	na	5 134	35	31	24	29	32	34
Alinta Energy	84	481	0.61	1.01	na	529	0	60	1	9	31	48
Australian Power & Gas	1 174	1 832	0.98	1.88	na	1 988	54	55	18	15	37	32
Click Energy	89	282	0.68	1.09	na	329	37	17	72	13	27	26
Diamond Energy		2		0.09	na	2		0		0		0
EnergyAustralia	185	133	0.03	0.03	na	448	1	1	0	0	1	3
Lumo Energy	84	352	0.05	0.19	na	401	54	38	17	14	39	18
M2 Energy	1	3	1.00	0.01	na	4	—	0	—	0	—	33
Momentum	60	145	0.39	0.40	na	180	38	31	na	31	17	24
Neighbourhood Energy	641	181	1.05	0.57	na	402	72	62	5	9	67	94
Origin Energy	2 056	4 969	0.40	0.98	na	6 143	26	25	2	2	2	22
People Energy		17		0.32	na	19		0		0		29
Powerdirect	51	122	0.23	0.35	na	143	0	0	94	12	0	0
QEnergy		5		0.64	na	5		0		0		0
Red Energy	1 187	1 141	0.68	0.59	na	1 247	30	30	17	19	27	29
Simply Energy	633	2047	0.59	1.41	na	2 509	31	27	20	11	32	34
Electricity total	12 725	16 557	0.54	0.71	na	19 483	36	33	19	15	28	30

TABLE 4.6 RECONNECTIONS — RESIDENTIAL GAS
2012-13 and 2013-14

Retailer	Total reconnections within 7 days		Reconnections within 7 days per 100 customers		All reconnections in the same name		Customers previously on an instalment payment plan		Customers with multiple disconnections within 24 months		Concession card holders	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
AGL	4 301	2 427	0.85	0.51	na	2 760	36	32	23	24	39	40
Alinta Energy	10	441	0.13	1.46	na	573	—	70	—	1	—	56
Australian Power & Gas	1 226	1 777	1.16	2.01	na	1 548	47	54	15	16	38	31
EnergyAustralia	100	94	0.02	0.02	na	560	0	9	0	0	0	14
Lumo Energy	204	497	0.15	0.34	na	661	69	52	17	16	69	27
M2 Energy		1		0.01	na	1		0		0		0
Origin Energy	979	2101	0.23	0.54	na	2 337	25	24	3	2	2	19
Red Energy	559	491	0.54	0.42	na	629	29	31	20	20	30	33
Simply Energy	355	627	0.40	0.56	na	855	28	25	18	9	41	31
Gas total	7 734	8 456	0.41	0.46	na	9 924	36	37	18	14	34	31

WHO STANDS OUT?

Tables 4.3 to 4.6 present individual retailer data on disconnection and reconnection. The following sections show further analysis of the data, and better inform an understanding of retailers' treatment of disconnected customers in financial difficulties.

ELECTRICITY

- Neighbourhood Energy reported the highest disconnection rate (5.15 per 100 customers).
- Australian Power & Gas also reported a high disconnection rate of 3.3 per 100 customers, while Click Energy, Simply Energy and Alinta Energy all reported a disconnection rate of over 2 per 100 customers.
- EnergyAustralia's disconnection rate remains low, due to EnergyAustralia reducing disconnections activity to allow for a full review of credit processes to ensure full compliance with regulatory requirements.
- Diamond Energy, M2 Energy, Powerdirect, Lumo Energy and Momentum all reported less than 1 disconnection per 100 customers.

GAS

- As in 2012-13, Australian Power & Gas reported the highest disconnection rate at 4.44 per 100 customers in 2013-14. It reconnected 45 per cent of these customers within seven days and also had the highest rate of disconnecting customers that were previously on an instalment payment plan.
- Other retailers with high disconnection rates of over 2 per 100 customers were Alinta Energy (3.19), Simply Energy (2.37) and Lumo Energy (2.18).
- As with electricity, EnergyAustralia again reported low rates of disconnection in 2013-14 due to EnergyAustralia reducing disconnections activity to allow for a full review of credit processes to ensure full compliance with regulatory requirements.

WHO IS DISCONNECTED?

Amongst those customers who may be experiencing payment difficulties are:

- customers previously on an instalment payment plan,
- customers disconnected multiple times, and
- concession card holders.

The overall proportion of disconnected customers experiencing payment difficulties has changed somewhat in the past five years. But the range of results does not indicate any one trend for the data set. The proportion of disconnected customers who had previously been on an instalment payment plan decreased, while the overall use of instalment payment plans increased in 2013-14. This could indicate that customers that are able to commit to a payment plan are less likely to be disconnected than in the past.

The proportion of disconnected customers who had multiple disconnections over 24 months also decreased. This may reflect that once a customer is disconnected once (and then reconnected) they are then able to arrange an instalment plan in order to avoid a future disconnection. The number of disconnections of concession card holders has risen steadily over the past five years, but remained less than 30 per cent of disconnected customers for both electricity and gas in 2013-14.

Figures 4.2 and 4.3 show industry average disconnection data, including:

- The proportion of disconnected electricity customers who were previously on instalment payment plans decreased to 23 per cent in 2013-14, which is the lowest in the past five years.
- The proportion of electricity customers disconnected more than once over 24 months declined from 14 per cent in 2012-13 to 12 per cent in 2013-14.
- The proportion of disconnected electricity customers who were concession card customers increased 1 per cent in 2013-14, up to 25 per cent.
- The proportion of disconnected gas customers who were previously on an instalment payment plan decreased similarly to electricity customers. It fell from 28 per cent in 2012-13 to 21 per cent in 2013-14.
- The proportion of disconnected gas customers who had multiple disconnections also decreased in 2013-14, down to 11 per cent of all disconnections from 16 per cent in 2012-13.

- The proportion of disconnected gas customers who were concession card customers decreased to 23 per cent in 2013-14, down from 28 per cent in 2012-13.

FIGURE 4.2 DISCONNECTIONS OF CUSTOMERS WITH PAYMENT DIFFICULTIES — ELECTRICITY
2009-10 to 2013-14

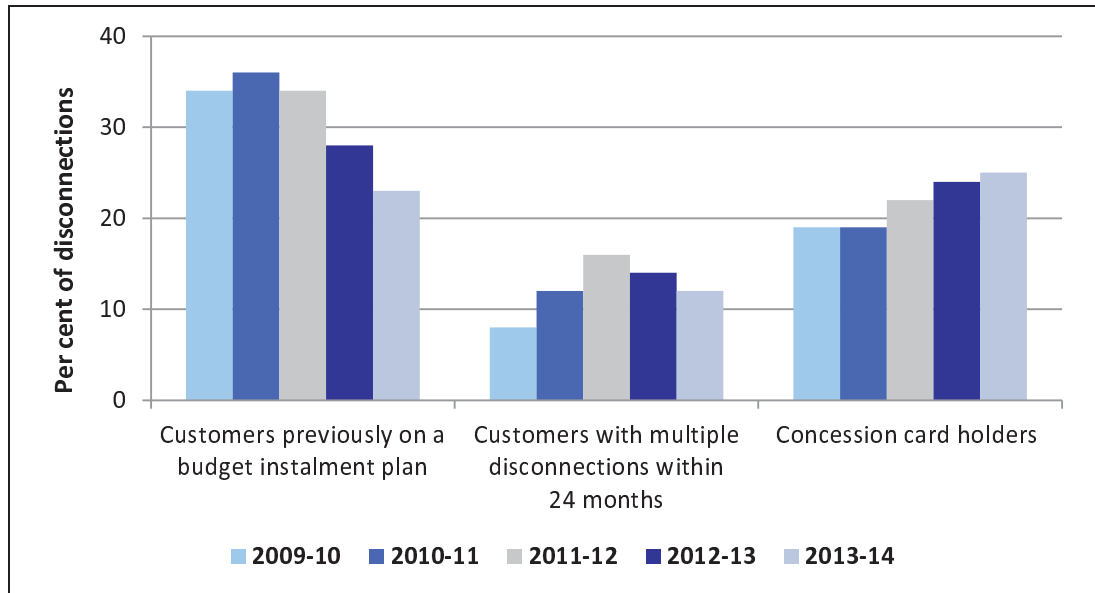
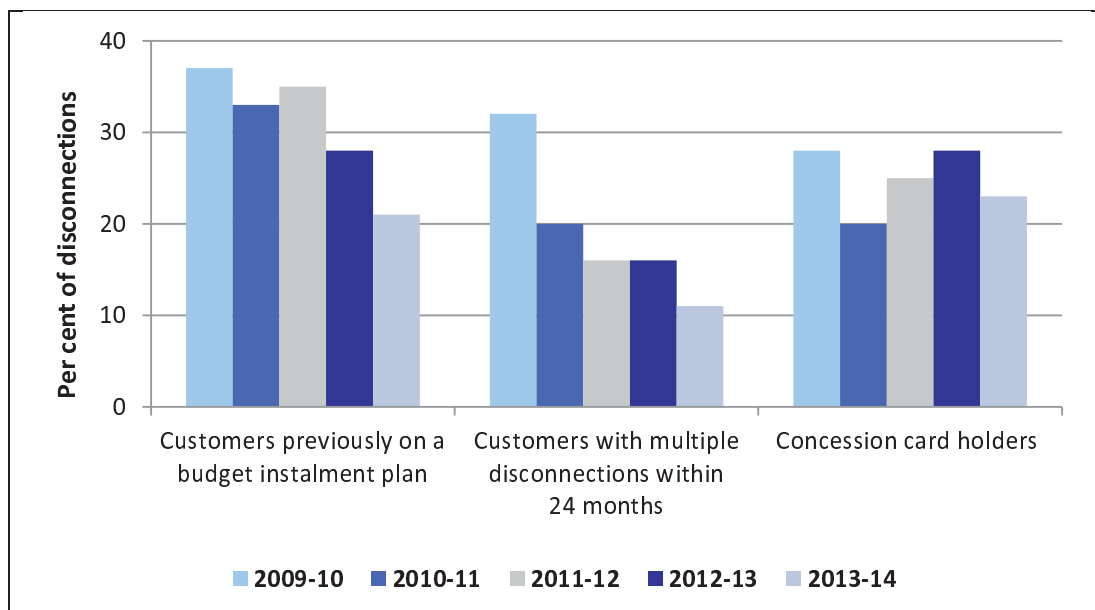


FIGURE 4.3 DISCONNECTIONS OF CUSTOMERS WITH PAYMENT DIFFICULTIES — GAS
2009-10 to 2013-14



4.4 SMALL BUSINESS DISCONNECTIONS AND RECONNECTIONS

This section compares disconnection and reconnection rates for electricity and gas small business customers in 2013-14. It also compares these rates with retailers' 2012-13 performance, and shows that small business customer disconnections and reconnections increased significantly in 2013-14.

Tables 4.7 and 4.8 show the following results:

- The electricity disconnection rate for business customers increased in 2013-14, to 2.19 per 100 customers, up from 0.91 in 2012-13. Simply Energy reported the highest electricity disconnection rate (5.29 per 100 customers, up from 1.66 in 2012-13), while amongst the major retailers, EnergyAustralia reported the lowest disconnection rates at 0.82 per 100 customers.
- Business gas customers also recorded an increased disconnection rate in 2013-14, up to 1.17 per 100 customers from 0.60 per 100 in 2012-13.
- The 2013-14 reconnection rates for business customers increased in line with the disconnection rate. Electricity reconnections increased from 0.29 to 0.86 per 100 customers, and gas reconnections increased from 0.19 per 100 customers to 0.40 in 2013-14.

**TABLE 4.7 DISCONNECTIONS AND RECONNECTIONS—
SMALL BUSINESS ELECTRICITY**
2012-13 and 2013-14

Retailer	Total disconnections		Disconnections per 100 customers		Total reconnections		Reconnections per 100 customers	
	2013-14	2012-13	2013-14	2013-14	2012-13	2013-14		
AGL	1 256	1.90	3.03	437	0.49	1.05		
Blue NRG	6	—	0.25	0	—	0.00		
Click Energy	24	1.58	3.11	4	0.90	0.52		
EnergyAustralia	369	0.10	0.82	13	0.02	0.03		
Lumo Energy	350	0.25	2.79	93	0.08	0.74		
Momentum	854	1.06	2.91	471	0.51	1.60		
Origin Energy	1 394	0.76	1.89	557	0.27	0.76		
Powerdirect	312	0.65	1.95	170	0.24	1.06		
QEnergy	6	—	1.01	3	—	0.51		
Red Energy	120	1.37	1.73	46	0.33	0.66		
Simply Energy	602	1.66	5.29	289	0.53	2.54		
Electricity total	5 293	0.91	2.19	2 083	0.29	0.86		

**TABLE 4.8 DISCONNECTIONS AND RECONNECTIONS—
SMALL BUSINESS GAS**
2012-13 and 2013-14

Retailer	Total disconnections		Disconnections per 100 customers		Total reconnections		Reconnections per 100 customers	
	2013-14	2012-13	2013-14	2013-14	2012-13	2013-14		
AGL	226	1.38	1.56	73	0.46	0.50		
EnergyAustralia	7	0.09	0.05	3	0.02	0.02		
Lumo Energy	54	0.38	3.24	11	0.09	0.66		
Origin Energy	215	0.38	1.37	74	0.11	0.47		
Red Energy	23	0.61	0.78	11	0.22	0.37		
Simply Energy	85	1.76	3.35	38	0.47	1.50		
Gas total	610	0.60	1.17	210	0.19	0.40		

5 CALL CENTRE PERFORMANCE AND COMPLAINTS

WHAT WE FOUND

The energy industry's call centre performance showed significant improvement during 2013-14. Data shows that retailers were generally able to respond to calls received in a far more timely manner than in 2012-13.

Total calls to retailers decreased by 6 per cent to 7.2 million in 2013-14, down from 7.6 million in 2012-13. This year 69 per cent of calls were answered by an operator within 30 seconds — an increase from 63 per cent in 2012-13.

In 2013-14, 5.3 per cent of callers abandoned their call while waiting for an operator to respond, down from 6.7 per cent in 2012-13, while customers spent an average of 73 seconds waiting for an operator — much lower than the average of 104 seconds in 2012-13.

The number of electricity complaints rose in 2013-14, compared with 2012-13. Total electricity complaints increased from 178 031 to 251 121 — up 41 per cent, following a 42 per cent increase in the previous year. Gas complaints also increased by 41 per cent in 2013-14 to 84 776 after a 113 per cent increase in 2012-13. The majority (56 per cent) of electricity complaints in 2013-14 were related to billing.

AGL recorded the highest number of complaints, while Powerdirect had the highest rate of complaints per customer.

Despite the increase in retailer reported complaints in 2013-14, EWOV reported a 2 per cent decrease in total complaints investigated. This may indicate that retailers are recording more interactions with consumers as 'complaints' rather than 'enquiries', or that they are generally better able to resolve customer issues prior to investigation by the Ombudsman.

5.1 WHY REPORT THESE INDICATORS?

The Commission assesses call centre performance and service delivery trends in the competitive market to provide information to customers about business responsiveness and efficiency. The Commission also monitors the number and types of complaints recorded by energy retailers and EWOV, to measure complaint trends over time for both the industry and individual retailers. Complaints data are separated into four sections:

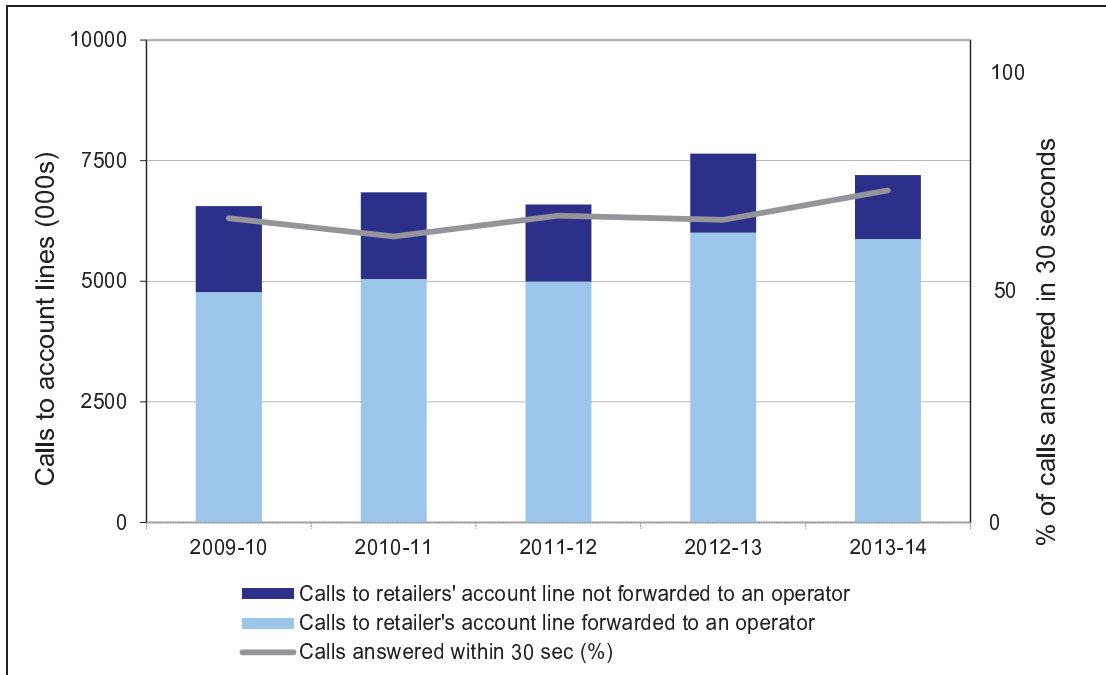
- marketing complaints — complaints associated with a retailer's actions in seeking to sign up a customer for a market contract
- billing/credit complaints — complaints about overcharging, prices, payment terms and methods, and debt recovery practices
- transfer complaints — complaints associated with the transfer of a customer to a new market contract, where that new contract is with either an existing or new retailer
- other complaints — complaints about the quality and timeliness of retail service other than a marketing, billing or transfer complaint. Examples include poor service, privacy considerations, failure to respond to complaints, and health and safety issues.

5.2 CALL CENTRE PERFORMANCE

This section reports on the performance of retailer call centres, including the total number of calls to electricity and gas account phone lines, the number of calls forwarded to an operator, and the proportion of these calls answered by an operator within 30 seconds. Figure 5.1 shows the following results:

- Total calls to retailers decreased by 6 per cent to 7.2 million in 2013-14, down from 7.6 million in 2012-13.
- This year 69 per cent of calls were answered by an operator within 30 seconds — an increase from 63 per cent in 2012-13.

FIGURE 5.1 CALL CENTRE PERFORMANCE — ELECTRICITY AND GAS
2009-10 to 2013-14



The Commission also assessed the average time waited by a customer to speak with an operator, and the number of calls abandoned while waiting for an operator to take a call (tables 5.1 and 5.2). Overall, these results show general improvement in most retailers' call centre customer service in 2013-14.

- This year 5.3 per cent of callers abandoned their call while waiting for an operator to respond, down from 6.7 per cent in 2012-13.
- EnergyAustralia and Powerdirect answered the lowest percentage (both below 50 per cent) of calls within 30 seconds. EnergyAustralia noted that its call centre performance data improved significantly in the second half of 2013-14 post the implementation of a new billing system in late 2012.
- Customers spent an average of 73 seconds waiting for an operator — much lower than the 104 seconds in 2012-13.
- Customers calling Powerdirect and EnergyAustralia in 2013-14 waited on average for over three minutes, while QEnergy customers waited for over 2.5 minutes.
- All other retailers reported average wait times below the industry average.

- Powerdirect (14 per cent) and EnergyAustralia (12 per cent) reported the highest percentages of abandoned calls to an operator, which correlates to longer average wait times for these retailers. Blue NRG (12 per cent) also reported a higher rate of abandoned calls, from a far smaller call sample.

TABLE 5.1 CALLS FORWARDED TO OPERATOR, AND ANSWERED WITHIN 30 SECONDS — ELECTRICITY AND GAS
2012-13 and 2013-14

Retailer	Calls to account line forwarded to an operator		Calls forwarded to an operator answered within 30 seconds (% of calls to operator)	
	2012-13	2013-14	2012-13	2013-14
AGL	1,316,101	962,882	58	79
Alinta Energy	130,358	214,812	80	77
Australian Power & Gas	488,350	381,929	68	69
Blue NRG	446	5,758	100	100
Click Energy	95,723	228,175	70	72
Diamond Energy	7,796	14,434	100	100
EnergyAustralia	875,652	1,050,363	47	46
ERM Business Energy	0	30	—	90
Lumo Energy	576,458	452,896	68	76
M2 Energy	135,768	226,124	86	77
Momentum	101,483	157,230	75	67
Neighbourhood Energy	140,069	53,336	75	78
Origin Energy	1,265,120	1,135,427	62	68
Pacific Hydro	0	2	—	100
People Energy	2,231	25,630	83	71
Powerdirect	85,401	114,173	48	45
Powershop	389	18,467	99	91
QEnergy	0	2,310	—	86
Red Energy	471,818	428,310	71	84
Simply Energy	316,852	401,166	74	76
Total	6 010 015	5 873 454	63	69

TABLE 5.2 CALL HANDLING PERFORMANCE — ELECTRICITY AND GAS
2012-13 and 2013-14

Retailer	Calls abandoned (% of calls to operator)		Average wait time (seconds)	
	2012-13	2013-14	2012-13	2013-14
AGL	4	2	70	22
Alinta Energy	3	3	26	42
Australian Power & Gas	4	5	48	56
Blue NRG	8	12	37	30
Click Energy	3	4	19	55
Diamond Energy	0	0	0	0
EnergyAustralia	12	12	246	199
ERM Business Energy	0	7	0	11
Lumo Energy	8	4	72	58
M2 Energy	1	2	2	34
Momentum	3	4	52	53
Neighbourhood Energy	5	4	28	33
Origin Energy	9	5	141	54
Pacific Hydro	0	0	0	7
People Energy	4	9	30	63
Powerdirect	17	14	157	193
Powershop	4	2	9	11
QEnergy	0	6	0	162
Red Energy	5	1	71	26
Simply Energy	5	4	37	37
Total	7	5	104	73

5.3 CUSTOMER COMPLAINTS

Electricity and gas complaints both increased in 2013-14. Figure 5.2 shows that electricity complaints reported by retailers rose to 9.4 per 100 customers from 6.6 in 2012-13. Gas complaints increased to 4.5 per 100 customers from 3.1 per 100 customers last year.

FIGURE 5.2 COMPLAINTS — ELECTRICITY AND GAS
2009-10 to 2013-14

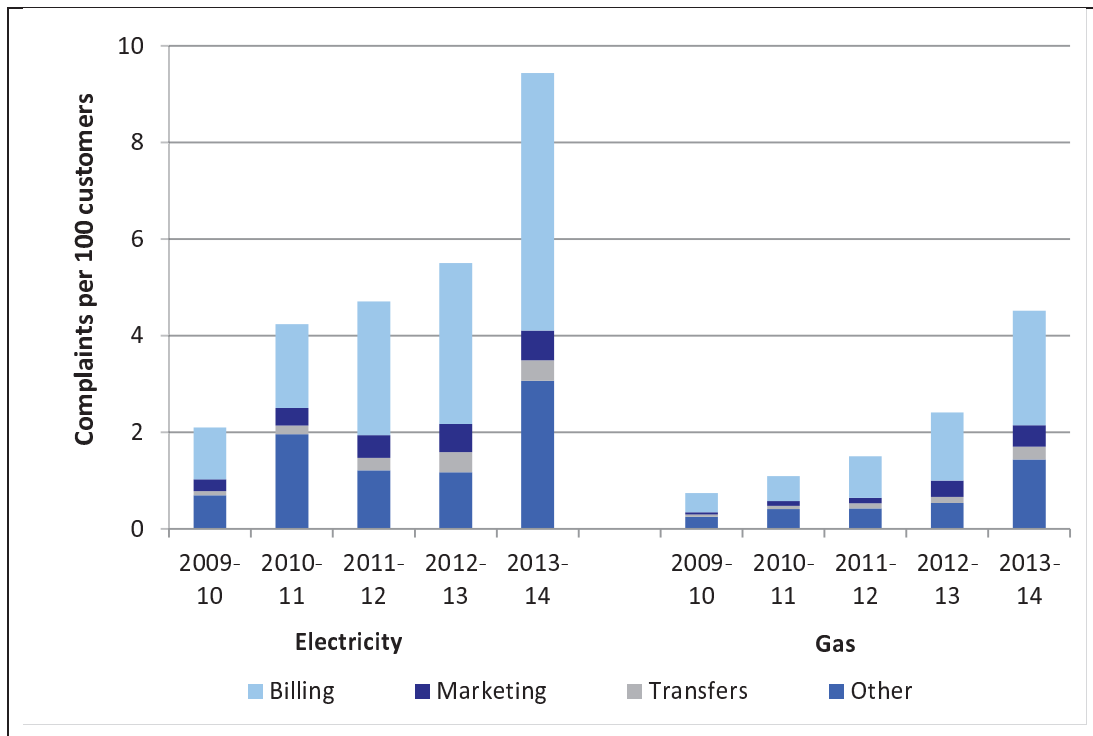


FIGURE 5.3 COMPLAINTS TO RETAILERS — ELECTRICITY
2013-14

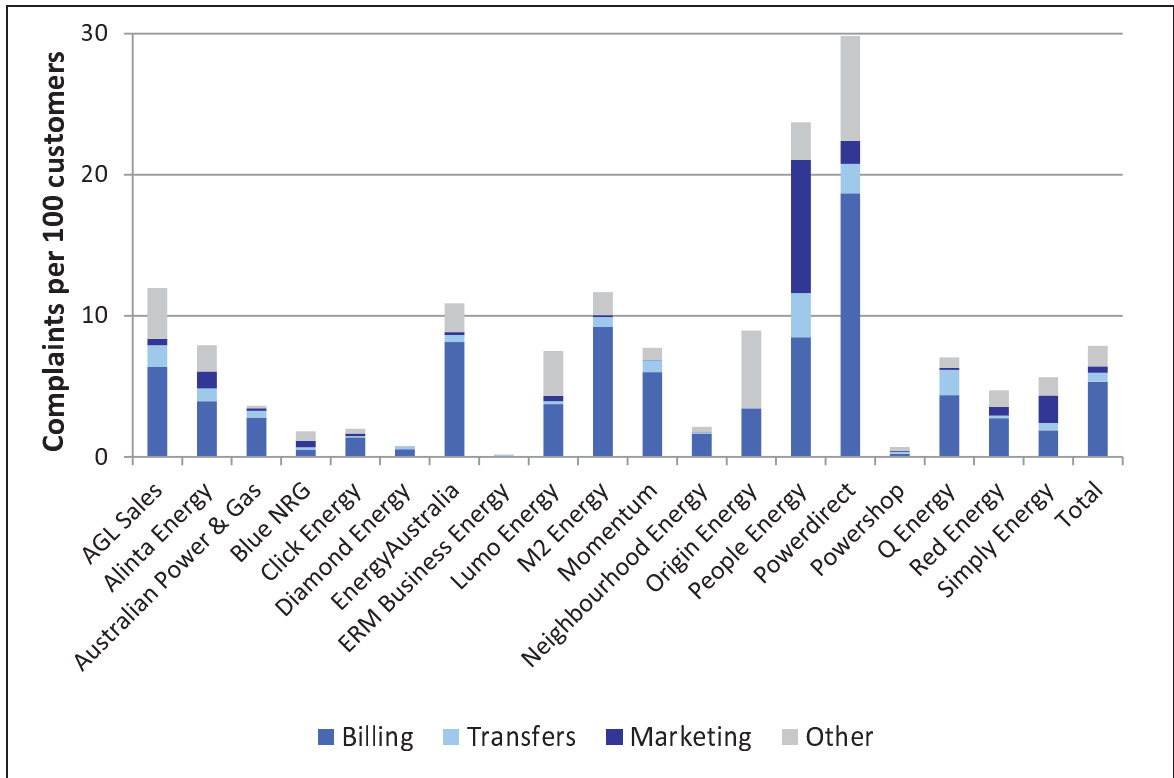
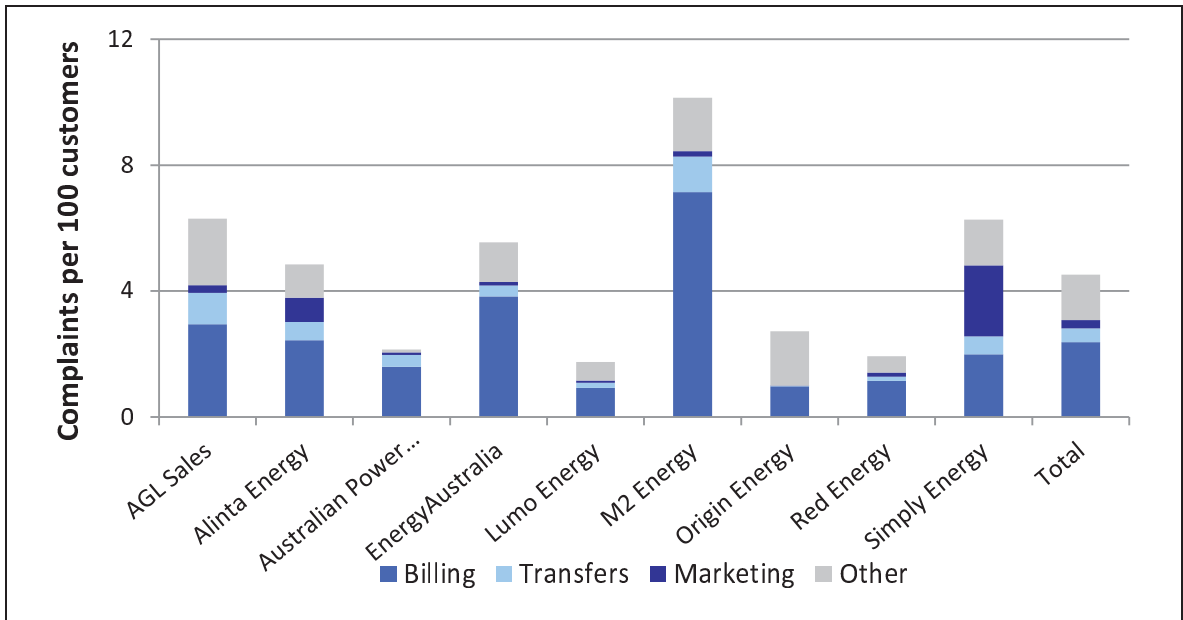


FIGURE 5.4 COMPLAINTS TO RETAILERS — GAS
2013-14



Tables 5.3 and 5.4, and figures 5.3 and 5.4, detail complaints performance for each energy retailer. The overall number and rate of electricity complaints rose in 2013-14, compared with 2012-13. Total electricity complaint numbers increased from 178 031 to 251 121 — up 41 per cent, following a 42 per cent increase in the previous year. Gas complaints also increased by 41 per cent to 84 776 in 2013-14 after a 113 per cent increase in 2012-13.

Overall, the electricity and gas data show the following results:

- The majority of electricity complaints in 2013-14 related to billing complaints (56 per cent), followed by other complaints (33 per cent), transfer complaints (7 per cent) and marketing complaints (4 per cent). This spread of complaints was similar to that in 2012-13, although there has been an increase in “other complaints” and a relative decrease in “billing complaints”.
- Powerdirect reported complaints from almost 30 in every 100 customers. Powerdirect notes that a number of customer enquiries and general calls were incorrectly logged as complaints, and that it is currently unable to separately capture these interactions without logging them as complaints. For example, discussions such as validating concessions, transferring funds, backdating move-in, and verifying ID are regularly captured as complaints, inflating the reported numbers.
- AGL reported the largest number of complaints (over 64 000), accounting for 12 per cent of its customers. AGL noted that due to the addition of 200,000 new customers through its acquisition of Australian Power & Gas in April 2014 and the release of a completely redesigned bill to all customers, the complaints increase was not unexpected. AGL believes that the increase in call volumes and complaints is largely attributable to enquiries from customers receiving a bill with different branding and presentation, and notes that a number of complaints are likely to have included simple enquiries regarding the customer’s bill, which should have been logged as enquiries or feedback rather than as complaints.
- EnergyAustralia continued to report a large number of complaints in 2013-14 due to problems with the introduction of a new billing system, with 60 852 complaints (almost 11 per cent of customers). EnergyAustralia notes that complaint numbers have improved in the second half of 2013-14, post the implementation of the new billing system in late 2012.

- Gas complaints followed a similar pattern to electricity, with 52 per cent relating to billing, followed by other complaints (32 per cent), transfer complaints (10 per cent) and marketing complaints (the remaining 6 per cent).
- M2 Energy reported the highest proportion of gas complaints in 2013-14, with 10.1 per 100 customers.
- AGL, Alinta Energy, and Simply Energy reported a large increase in the proportion of gas complaints in 2013-14. AGL notes that due to the subjective nature of complaints, a number of simple customer enquiries continue to be logged as complaints although there has been no expression of customer dissatisfaction. In AGL's experience, the increase in complaints is more reflective of the fact that customer interactions are being logged as complaints at a number of levels, rather than more correctly as feedback or an enquiry.

TABLE 5.3 COMPLAINTS, BY RETAILER — ELECTRICITY
2012-13 and 2013-14

	Billing complaints		Transfer complaints		Marketing complaints		Other complaints		Total complaints		Total complaints per 100 customers	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
AGL	23 964	34 410	10 224	8 402	2 071	2 410	7 347	19 578	43 606	64 800	7.2	12.0
Alinta Energy	100	1 886	15	433	176	579	33	886	324	3 784	2.3	7.9
Australian Power & Gas	1 165	2 711	421	456	92	196	3 470	163	5 148	3 526	4.3	3.6
Blue NRG	5	18	2	5	8	16	1	23	16	62	10.7	1.8
Click Energy	221	371	64	24	55	52	87	86	427	533	3.1	2.0
Diamond Energy	16	13	3	4	0	1	1	1	20	19	1.6	0.8
EnergyAustralia	39 047	45 442	4 019	2 800	3 832	1 160	13 039	11 450	59 937	60 852	9.5	10.9
ERM Business Energy	—	2	—	3	—	0	—	0	—	5	—	0.2
Lumo Energy	12 829	7 608	793	383	2 020	796	7 735	6 453	23 377	15 240	11.4	7.5
M2 Energy	6 561	3 288	266	251	222	46	1 563	590	8 612	4 175	34.5	11.7
Momentum	1 154	4 994	214	711	11	7	43	731	1 422	6 443	2.7	7.7
Neighbourhood Energy	212	520	43	27	489	1	554	125	1 298	673	2.1	2.1
Origin Energy	19 152	20 145	469	278	221	100	2 214	32 543	22 056	53 066	3.7	9.0
People Energy	1	460	4	170	9	514	0	144	14	1 288	2.0	23.7
Powerdirect	609	11 313	97	1 261	176	994	222	4 508	1 104	18 076	2.4	29.9
Powershop	0	9	0	6	0	3	0	11	0	29	—	0.7
QEnergy	—	64	—	26	—	2	—	11	—	103	—	7.0
Red Energy	4 329	5 514	416	397	1 377	1 226	2 014	2 352	8 136	9 489	4.5	4.7
Simply Energy	615	2 975	29	816	1 034	3 120	856	2 047	2 534	8 958	2.1	5.6
Electricity Total	109 980	141 743	17 079	16 453	11 793	11 223	39 179	81 702	178 031	251 121	6.6	9.4

TABLE 5.4 COMPLAINTS, BY RETAILER — GAS
2012-13 and 2013-14

	Billing complaints		Transfer complaints		Marketing complaints		Other complaints		Total complaints		Total complaints per 100 customers	
	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14	2012-13	2013-14
AGL	6 832	14 615	4 458	4 926	346	1 214	2 331	10 437	13 967	31 192	2.7	6.3
Alinta Energy	25	736	7	174	15	235	5	319	52	1 464	0.7	4.8
Australian Power & Gas	510	1 410	259	324	45	77	1 862	79	2 676	1 890	2.5	2.1
EnergyAustralia	12 699	17 439	2 079	1 585	1 169	525	5 734	5 728	21 681	25 277	4.1	5.5
Lumo Energy	1 998	1 363	204	239	183	119	873	869	3 258	2 590	2.3	1.7
M2 Energy	499	1 317	36	209	21	31	110	315	666	1 872	13.9	10.1
Origin Energy	11 065	3 925	240	73	55	23	2 429	6 975	13 789	10 996	3.1	2.7
Red Energy	1 117	1 373	139	163	180	152	575	619	2 011	2 307	1.9	1.9
Simply Energy	385	2 280	31	653	789	2 589	597	1 666	1 802	7 188	2.0	6.3
Gas Total	35 130	44 458	7 453	8 346	2 803	4 965	14 516	27 007	59 902	84 776	3.1	4.5

5.4 ENERGY AND WATER OMBUDSMAN (VICTORIA)

Complaint classifications can vary with the retailer's customer service team, the manager and/or the system used to record the complaint, so the Commission also examines EWOV complaints data. This data reflects the number of complaints received for full investigation by EWOV, and indicates how well retailers resolve customer complaints. The Commission looks at whether the data exhibit any trends and whether it correlates with retailers' reporting in 2013-14 (tables 5.3 and 5.4).

Examining both data sets identifies systemic issues with complaints. A high number of reported complaints is not necessarily a concern, particularly if a retailer resolves complaints effectively. But a high number of complaints to a retailer, combined with a high number of complaints investigated by EWOV can indicate the retailer is not effectively resolving complaints in the first instance.

Tables 5.5 and 5.6 show the following results:

- While retailer reported complaints increased in 2013-14, EWOV reported a 2 per cent decrease in total complaints investigated (down to 9 294 compared with 9 493 in 2012-13). The proportion of complaints in each category was similar to that in 2012-13.
- EWOV investigated 0.26 electricity complaints per 100 residential and business customers in 2013-14 — marginally lower than the 0.27 per 100 customers in 2012-13.
- The largest number of electricity complaints investigated by EWOV (2 200) were for EnergyAustralia. Australian Power & Gas had the highest rate of complaints investigated per customer, with 1.01 per 100 customers. Australian Power & Gas also had the highest rate of its complaints resulting in a full investigation by EWOV.
- EWOV investigated 2 393 gas and dual fuel complaints in 2013-14, up from 2 256 in the previous year. Investigated complaints per 100 customers increased slightly to 0.13 in 2013-14 from 0.12 in 2012-13.
- Australian Power & Gas recorded the highest ratio of investigated gas complaints in 2012-13, with 0.65 per 100 customers. The remaining retailers were close to, or below, the industry average.

TABLE 5.5 COMPLAINTS RECEIVED FOR FULL INVESTIGATION BY EWOV — ELECTRICITY, GAS AND DUAL FUEL
2011-12 to 2013-14

Retailer	Affordability complaints				Other retail complaints				Total complaints			
	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14
Electricity												
AGL	540	1 253	996	691	248	138	1 231	1 501	1 134			
Alinta Energy	—	7	74	0	7	23	0	14	97			
Australian Power & Gas	103	343	872	285	45	109	388	388	981			
Click Energy	8	30	145	6	8	37	14	38	182			
Diamond Energy	1	5	0	0	0	0	1	5	0			
EnergyAustralia	1 096	2 241	1 956	955	348	244	2 051	2 589	2 200			
Integral Energy	0	0	0	1	0	0	1	0	0			
Lumo Energy	143	205	202	451	46	46	594	251	248			
M2 Energy	4	10	28	6	2	6	10	12	34			
Momentum Energy	16	93	109	29	10	23	45	103	132			
Neighbourhood Energy	23	116	118	83	17	9	106	133	127			
Origin Energy	896	1 554	985	1 539	189	127	2 435	1 743	1 112			
People Energy	—	—	5	—	—	1	—	—	6			
Powerdirect	35	124	209	41	21	43	76	145	252			
QEnergy	—	—	0	—	—	1	—	—	1			
Red Energy	98	136	113	151	15	14	249	151	127			
Simply Energy	197	140	217	286	24	51	483	164	268			
Electricity total	3 160	6 257	6 029	4 524	980	872	7 684	7 237	6 901			

TABLE 5.5 COMPLAINTS RECEIVED FOR FULL INVESTIGATION BY EWOV — ELECTRICITY, GAS AND DUAL FUEL (CONTINUED)
2011-12 to 2013-14

Retailer	Affordability complaints				Other retail complaints				Total complaints			
	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14	2011-12	2012-13	2013-14
Gas												
AGL	342	488	318	239	113	63	581	601	381			
Alinta Energy	—	0	38	—	2	7	—	2	45			
Australian Power & Gas	76	184	503	140	30	68	216	214	571			
EnergyAustralia	295	513	525	320	169	160	615	682	685			
Lumo Energy	95	95	83	161	25	23	256	120	106			
M2 Energy	0	0	4	0	0	3	0	0	7			
Origin Energy	299	413	354	380	79	71	679	492	425			
Red Energy	44	41	33	33	11	11	77	52	44			
Simply Energy	98	52	77	87	13	29	185	65	106			
Other	0	0	3	0	0	9	0	0	12			
Gas totals	1 249	1 786	1 938	1 360	442	444	2 609	2 228	2 382			
Dual fuel												
EnergyAustralia	2	9	9	1	1	0	3	10	9			
Lumo Energy	3	17	2	2	1	0	5	18	2			
Dual fuel total	5	26	11	3	2	0	8	28	11			
ENERGY TOTAL	4 414	8 069	7 978	5 887	1 424	1 316	10 301	9 493	9 294			