

ONE BILL STUDY

Understand Customer Billing Preference Regarding their Natural Gas Bill

Prepared for



Prepared by:



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FOREWORD

A BACKGROUND, PURPOSE AND OBJECTIVES

At present, residential customers receive one bill from Enbridge Consumers Gas, which includes applicable REM charges for the gas commodity and transportation. The marketer's name, phone number and gas supply charges appear on the bill from Enbridge Consumers Gas.

Under some models of deregulation, the billing relationship has taken on new forms with the bills coming not just from the utilities but also from the REMs. The following list represents the three main billing proposals:

1. The utility issues a single bill which includes the REM gas supply charges (current scenario);
2. REMs issue a single bill which includes gas supply charges as well as the utility's gas delivery and monthly charges;
3. The utility and the REM each issue a bill for the service they have provided. The utility's bill covers the delivery and monthly charges; the REM's bill covers gas supply charges. Under this scenario, the REMs can elect to combine other products and services with the gas supply charges.

Enbridge Consumers Gas has commissioned this research with Research Dynamics to evaluate customers' perceptions and attitudes regarding the three billing models.

B. OBJECTIVES OF THE STUDY

The research objectives include the following:

- To determine customer preference for receiving a consolidated bill from Enbridge Consumers Gas versus an REM;
- To introduce customers to the concept of a split bill and then to assess their preference between a split and a consolidated bill;
- To determine customer preference between receiving a consolidated bill from Enbridge Consumers Gas versus an REM, assuming that the REM has the option of including other products and services on the bill;
- To determine customer preference between a consolidated bill from an REM and a split bill, assuming that, under either option, the REM has the ability to include other products and services on the bill;
- To determine the preferred sources of gas industry information for consumers and to establish the ranking of Enbridge Consumers Gas among these sources;
- To determine consumers' perceptions of the gas bill as a "good way" to disseminate gas industry information;

In a survey of this nature, it is important to avoid introducing a response-bias either through methodology or, through question wording. In an attempt to avoid biasing customers' responses, the identity of the client was kept confidential, answer lists were rotated, and questions, which mentioned both Enbridge Consumers Gas and an REM, were worded to give roughly "equal" emphasis to each organization.

C. GENERAL DESIGN AND EXECUTION

In order to fulfill the objectives above, a total of 403 telephone interviews were conducted in the Enbridge Consumers Gas territory. To ensure adequate samples of REM and Enbridge customers quotas were set as follows:

- 202 customers who are "system customers";
- 201 customers who are REM customers.

As the project proceeded we realized that there is considerable confusion among those who are supplied by a REM, as more than half (58.7%) believe ECG is supplying them their natural gas. For the purposes of making comparisons, ECG and REM customers are based on CLAIMED supplier responses at Question 1 (see Appendix 1 – Survey). We believe that understanding customer reaction and preference as to whom they would want to receive a bill from is better served in light of who they think is their supplier. Therefore the sample sizes for the comparison groups are:

- 315 CLAIM Enbridge is their supplier
- 88 CLAIM a REM is their supplier

All interviewing for this project was conducted between December 1 and December 15, 2000. A callback design was used, with up to three calls being made in an attempt to obtain an interview at a qualifying household when the selected individual was not available during the initial call.

A copy of the questionnaire is appended (Appendix 1).

D. STATISTICAL VARIATION

Statistical variation depends upon the statistic being measured and the values which it generates.

As a guide, the following table shows the approximate confidence ranges for different sample sizes, at the 95% level of confidence.

Sample Size	Confidence Range
400	±5%
300	±6%
200	±7%
100	±10%

No weighting was used because the sample distribution matched very closely with the current franchise distribution. A copy of the franchise distribution as well as the distribution obtained in this study is presented in Appendix 1.

The following completion rate was obtained on this study:

	Total Numbers Dialled	Completion Rate
	(4,183) #	(100) %
Outcome:		
NO ANSWER/ ANSWERING MACHINE	736	17.60%
BUSY	55	1.30%
FAX NUMBER	31	0.70%
NIS/DIS/BUSINESS NUMBER	238	5.70%
LANGUAGE BARRIER	212	5.10%
HOUSEHOLD REFUSAL	1855	44.30%
RESPONDENT REFUSAL	270	6.50%
RESPONDENT NOT AVAILABLE - ARRANGE CALLBACK	309	7.40%
DON'T KNOW AT Q1/ WHERE BUY NATURAL GAS	13	0.30%
QUOTA FULL	6	0.10%
TERMINATED PART-WAY	55	1.30%
COMPLETED	403	9.60%

E. THE STUDY FINDINGS

Results of this research are presented under the following main headings:

1. Executive Summary
2. General Summary
3. Appendix 1 – Survey
4. Appendix 2 – Geographic Distribution of Current Franchise vs. Sample

II

EXECUTIVE SUMMARY

Less than half of REM customers actually realize that a REM is servicing them. For the purposes of comparison, it was agreed that “Claimed” REM customers as opposed to “Actual” REM customers would be a more appropriate definition since preferences toward billing options would be influenced by whom you believe is your current Natural Gas supplier.

Gas customers overwhelmingly prefer to receive one bill (ECG Customers:88% and REM Customers:92%), with ECG being the preferred source of this bill. REM customers as well would prefer to receive their one bill from ECG instead of their REM (ECG: 71% vs. REM: 58%). The primary reason that ECG is preferred is because of the reputation and level of experience that ECG offers.

In terms of the billing options proposed, we can conclude that customers would prefer to have ECG involved in their billing as long as it does not introduce extra paperwork. When deciding between ECG sending a bill for all gas related charges or a REM billing gas and other utility charges, customers overwhelmingly chose ECG to send the bill (ECG: 71% and REM: 66%).

Conversely, when deciding between ECG and the REM each sending separate bills for gas or a REM billing gas and other utility charges, ECG customers would prefer a single bill from the REM with all charges (47% for combined billing from REM vs. 27% for separate billing from each). REM customers were fairly evenly split between these two choices (40% preferring combined, 39% preferring separate billing). It is interesting to note that 26% of ECG customers have no preference and 21% of REM customers have no preference between these choices. Those that prefer combined billings from a REM indicated that as long as charges were separated and clear, one bill would be better – as long as there were no additional charges

When asked to think of household bill payment in general, 68% of ECG and 59% of REM customers strongly agree that they prefer to receive a separate bill from each company they deal with. Generally, most customers agree fairly strongly that they:

- *Read off of the information on the bill*
- *Verify the amounts shown on the bill*
- *Like a lot of detail on bills*

Customers do not currently believe that:

- *That bills are too detailed, gas bills or other bills*

- *That they would like to receive bills electronically*
- *That they only look at the amount owing*

ECG is the primary source of information about the gas industry, followed by the Internet. REM customers are also inclined to utilize Government and newspaper sources. A clear majority of customers (86%) indicated that inserts in the gas bill are a good way of communicating. Only about 50% of customers reacted favourably to receiving MARKETING AND OTHER information FROM AN INDEPENDENT ENERGY REM with their ENBRIDGE gas bill, and another 20% were neutral in their response.

Just under one-quarter (22%) of REM customers (past or present) indicated that they experienced a problem with a REM. For the most part, problems experienced with REM's centered on trust. Most examples cited could be summarized as:

- *They do not live up to their promises/ Do not fulfill their contract (33%)*
- *They do not tell the truth/ Lie to get people to sign up (17%)*
- *Some door to door sales people are pushy/Dishonest/Fast Talking (15%)*
- *People sign contracts and don't know what they are signing for (13%)*

Notably fewer ECG customers (past or present) have experienced a problem with ECG. Contrary to the REM issues, the problems experienced with ECG relate to customer service, with most comments centered around:

- *Service is very poor (38%)*
- *Some billing problems (26%)*
- *Takes too long to get repairs done (19%)*
- *Gas Prices are too high (9%)*
- *Charge too much for Service Calls (8%)*

Enbridge Consumers Gas continues to maintain a strong level of reliability and trustworthiness amongst their customer base. This is quite apparent when asked about bill source preference. Respondents much rather prefer a single bill for gas services they purchase, as compared to receiving two bills covering these changes. When faced with the two bill option, just under half of customers indicated that they would be willing to overlook their concerns with a REM if it means a REM can have both supply and delivery charges on one bill. The fact that REM could include additional utility bills with their invoice is a "nice-to-have", but not a key driver to the billing source selection.

III

GENERAL SUMMARY

1. Preferences For A Consolidated And A Split Bill

EXHIBIT 1

Q. 2 Which one of the following two billing options would you prefer? Assume that the amount you owe would be the same for each option. (READ LIST.)

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
	Actual	(403) %	(315) %
Preferred Billing Option:			
You Receive One Bill Which Includes All Gas Charges	89.1	88.3	92.0
You Receive Two Bills, One From Enbridge With Its Charges, And The Other From The Energy Marketer, With Its Charges	7.4	7.9	5.7
NO PREFERENCE	1.7	1.6	2.3
DON'T KNOW			

Gas customers overwhelmingly prefer to receive one bill that would include all gas charges (88% of Enbridge customers, 92% of REM customers). (See Exhibit 1)

2. Preferences For A Consolidated Bill From Enbridge Consumers Gas And A Consolidated Bill From An REM

EXHIBIT 2

Q. 3 If you were to receive one bill that includes all gas charges, would you prefer to receive that one bill from Enbridge Consumers Gas or from the energy marketer. (READ, IF NECESSARY: STILL ASSUMING THAT YOU ARE BUYING GAS FROM AN ENERGY MARKETER.)

Total Enbridge Consumers Gas And Direct Purchase Customers	Actual	Total	Claimed	Claimed
			Enbridge System Customers	REM Customers
		(403)	(315)	(88)
		%	%	%
Preferred Billing Option:				
Enbridge Sends You The Gas Bill		67.7	70.5	58.0
The Energy Marketer Sends You The Gas Bill		4.7	3.5	9.1
NO PREFERENCE		24.6	22.2	33.0
DON'T KNOW				

Gas customers prefer receiving one bill for all gas charges from Enbridge, including the majority of REM customers. In fact less than 10% of REM customers prefer to receive the one gas bill from their REM. Of note is the number of respondents that indicated they had no preference, (22% of Enbridge customers; 33% of REM customers.) (See Exhibit 2)

3. Volunteered Reasons For Stated Answer Regarding Receiving A Consolidated Bill From Enbridge Consumers Gas Or From An REM

EXHIBIT 3

Q. 4 Why do you say that? (PROBE: ANY OTHER REASONS?)

Total Enbridge Consumers Gas And Direct Purchase Customers	Preferred Source Of Consolidated Bill		
	Enbridge	REM	No Preference
Actual	(273) %	(19)* %	(99) %
Volunteered Reasons:			
References To Familiarity/Experience (NET):	41.8	21.1	1.0
Has Served Us For A Long Time	34.8	15.8	1.0
Never Had A Problem/Satisfied With Service	7.3	5.3	-
Supplies Us With Other Products and Services	3.3	-	-
References To Supply/Delivery Of Gas (NET):	8.1	5.3	1.0
They Supply and Deliver The Gas	6.2	5.3	1.0
Enbridge owns the meters and gas lines	3.3	5.3	-
References To Reputation (NET):	18.7	5.3	-
Well Known Company With a Good Reputation	10.3	5.3	-
Trust Enbridge	7.0	-	-
They Have been Around For a Long Time	4.8	-	-
References To Good Billing (NET):	26.4	57.9	17.2
I'm Used to Their Billing, It's Clear, Simple and Easy to Understand.	13.6	15.8	-
Prefer Everything on One Bill / Easier to Pay and Understand.	8.1	5.3	16.2
Prefer to be Billed By The Marketer / Supplier	5.5	42.1	1.0

...Continued

EXHIBIT 3 (Continued)

Total Enbridge Consumers Gas And Direct Purchase Customers	Preferred Source Of Consolidated Bill		
	Enbridge	REM	No Preference
Actual	(273) %	(19)* %	(99) %
Volunteered Reasons:			
References To Negative Experience With Other Suppliers	4.8	5.3	2.0
Don't like Changing Marketers	1.5	-	1.0
Don't Trust Other Marketers	3.3	5.3	1.0
References To Does Not Matter Which Company (NET):	9.5	15.8	82.8
Doesn't Matter as Long as I Get a Bill	5.5	-	73.7
Whatever is Cheaper	1.1	10.5	6.1
No Particular Reason	2.9	5.3	3.0
Not Familiar with Other Marketers	2.6	-	-
It will be the Same Price No Matter Who Sends the Bill.	0.4	5.3	5.1
DON'T KNOW	2.9	-	2.0

* Caution: Small base.

(NET) is used as an unduplicated count of the various comments given by one person when the comments apply to the same topic, overall. Thus, the sum of the various mentions may not equal the "net". Also, comments given by fewer than 3% of respondents are generally not shown for sake of brevity.

The primary reason given from customers preferring to receive one consolidated bill from Enbridge is because of the level of familiarity and experience that customers have with Enbridge. Similarly, a number of customers speak to Enbridge's good reputation and level of trust they offer. (See Exhibit 3).

4. Preferences For A Consolidated Bill From Enbridge Consumers Gas And A Consolidated Bill Bundled With Other Products And Services From An REM

EXHIBIT 4

Q. 5 Which one of the following billing options would you prefer? (READ, IF NECESSARY: IMAGINE THAT THE ENERGY MARKETER HAS THE OPTION OF INCLUDING OTHER PRODUCTS AND SERVICES ON THE GAS BILL, SUCH AS CHARGES FOR YOUR ELECTRICITY OR LONG DISTANCE TELEPHONE.)

Total Enbridge Consumers Gas And Direct Purchase Customers	Actual	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(403) %	(315) %	(88) %
Preferred Billing Option:				
Enbridge Sends You The Gas Supply And Delivery Bill		70.0	71.1	65.9
The Energy Marketer Sends You The Gas Supply And Delivery Bill, Which Also Includes Charges For Other Products And Services Such As Electricity Or Long Distance Telephone		19.4	19.0	20.5
NO PREFERENCE		6.5	5.7	9.1
DON'T KNOW		4.2	4.1	4.5

Gas customers prefer Enbridge issuing a gas bill for all gas charges. Only 19% of Enbridge customers and 20.5% of REM customers indicated a preference for the REM to issue the gas bill with the inclusion of other utility charges. (See Exhibit 4)

5. Preferences For A Consolidated Bill Bundled With Other Products And Services From An REM And A Split Bill With The REM Portion Including Other Products And Services

EXHIBIT 5

Q. 6 And still assuming that the energy marketer can include other products and services, which of the following two billing options would you prefer?

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
Actual	(403)	(315)	(88)
	%	%	%
Preferred Billing Option:			
The Energy Marketer Sends You The Gas Supply And Delivery Bill, Which Includes All The Gas Charges, As Well As Other Products And Services	45.7	47.3	39.8
Two Bills Are Sent To You, One From Enbridge Gas With Its Part Of The Gas Charges, And The Other From The Energy Marketer, With Its Gas Charges, As Well As Charges For Other Products And Services	29.3	26.7	38.6
NO PREFERENCE	6.2	6.7	4.5
NEITHER	13.2	12.7	14.8
DON'T KNOW	5.7	6.7	2.3

When deciding between Enbridge and the REM each sending separate bills for their gas component, or of having the REM bill all gas and other utility charges, of the options presented, Enbridge customers prefer a combined bill from the REM. REM customers were somewhat evenly split between these two choices. (See Exhibit 5) In fact, 26% of customers indicated that they had no preference, favoured either option or were not sure which option they preferred.

In terms of the billing options proposed, it can be concluded that customers would prefer to have Enbridge involved in their billing as long as it does not introduce extra paperwork. That is, just under half of surveyed customers do not want to receive a separate bill from Enbridge for the delivery of gas and another bill from the REM for the supply of gas. Given the two options presented, customers

would want a bill from the REM if all gas and other utility charges are combined on one bill. Given that the level of interest in an “all utility bill” solution from the REM (45.7% at Exhibit 5) is not as favorable as an “all gas bill” solution from ECG (70.0% at Exhibit 4) shows that people are more interested in dealing with ECG as a single source “gas bill” provider – despite the perceived convenience that a “all utility bill” from a REM might offer.

6. Volunteered Comments And Concerns About The Various Billing Scenarios

EXHIBIT 6

Q. 7 Do you have any concerns, or would you like to make any comments about the billing options that we have talked about?

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge Systems Customers	Claimed REM Customers
Actual	(403) %	(315) %	(88) %
Billing Charge Issues (NET):	18.9	18.1	21.6
All in One Would be Better if the Charges are Separated and Clear.	8.9	9.2	8.0
Charges/Prices are way to High	5.0	4.1	8.0
No Matter as long as There are no Extra Charges.	2.7	2.5	3.4
Prefer Separate and Specific Billings (NET):	11.2	10.5	13.6
Not Interested in Other Options/Happy with the way it is now.	6.9	7.6	4.5
Convenience (NET):	3.5	2.5	6.8
It's easier to budget with Separate Bills because they usually come at different times, not all at once	1.7	0.6	5.7
Separate Bills would be too Confusing/ Complicated	1.2	1.3	1.1
DON'T KNOW	4.7	4.8	4.5

(NET) is used as an unduplicated count of the various comments given by one person when the

comments apply to the same topic, overall. Thus, the sum of the various mentions may not equal the "net". Also, comments given by fewer than 3% of respondents are generally not shown for sake of brevity.

7. Attitudinal Ratings Concerning Bills And Bill Payment

EXHIBIT 7

Q. 8 I'm going to read some statements describing various aspects of household bill payment. I'd like you to think about bill payment, in general, and not just for natural gas. For each statement, please tell me whether you Agree Strongly, Agree Somewhat, Neither Agree Nor Disagree, Disagree Somewhat or Disagree Strongly.

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
Actual	(403)	(315)	(88)
	%	%	%

Billing Attitudinal Statement:

I Prefer To Receive A Separate Bill From Each Company I Deal With

Agree Strongly	66.3	68.3	59.1
Disagree Strongly	6.7	7.3	4.5

I Usually Try To Verify The Amounts Shown On The Bills I Receive

Agree Strongly	49.6	50.8	45.5
Disagree Strongly	7.9	8.6	5.7

I Read All Of The Information On My Bills

Agree Strongly	49.9	51.1	45.5
Disagree Strongly	6.7	6.7	6.8

I Like A Lot Of Detail On My Bills

Agree Strongly	43.2	41.3	50.0
Disagree Strongly	7.7	8.3	5.7

I Prefer To Pay My Bills Through Automatic Withdrawal From My Bank Account

Agree Strongly	34.5	35.9	29.5
Disagree Strongly	36.0	35.6	37.5

...Continued

EXHIBIT 7 (Continued)

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
Actual	(403) %	(315) %	(88) %
Billing Attitudinal Statement:			
I Receive More Bills Now Than I Did Two Or Three Years Ago			
Agree Strongly	16.4	16.8	14.8
Disagree Strongly	27.8	29.2	22.7
I Usually Just Read The Total Owing On My Bills			
Agree Strongly	18.9	19.4	17.0
Disagree Strongly	49.9	48.3	55.7
I Think Some Bills Are Too Detailed			
Agree Strongly	9.7	9.8	9.1
Disagree Strongly	34.2	34.3	34.1
I Would Prefer To Have Several Of My Bills Consolidated Onto Just One Bill			
Agree Strongly	12.7	13.0	11.4
Disagree Strongly	52.1	52.7	50.0
I Never Really Look At My Bills Except To Find Out How Much I Owe			
Agree Strongly	11.2	12.1	8.0
Disagree Strongly	57.8	57.1	60.2
I Think The Natural Gas Bill Is Too Detailed			
Agree Strongly	6.0	6.0	5.7
Disagree Strongly	42.9	42.5	44.3

As evidenced, by the billing options proposed, all customers suggest that, in general, they wish to receive separate bills from each company they deal with. Residential customers claim to inspect thoroughly the bills that they receive, stating that they generally prefer a lot of detail with their bills. As billing preference relates to natural gas, both Enbridge and REM customers agree that the natural gas bills are not too detailed. The one area where there does not seem to be very much consensus is the degree to which customers prefer to pay bills through an automatic withdrawal from their bank account. (See Exhibit 7)

8. Volunteered Sources Of Information About The Gas Industry

EXHIBIT 8

Q. 9 If you wanted to find out more about the gas industry and changes in the gas industry, where do you think that you would go for information? (DO NOT READ LIST. PROBE: ANYWERE ELSE YOU MIGHT LOOK FOR INFORMATION?)

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed	Claimed
		Enbridge System Customers	REM Customers
Actual	(404) %	(315) %	(88) %
Volunteered Sources Of Information:			
Gas Company (NET):	50.2	51.7	45.5
Enbridge consumers Gas	48.3	49.8	43.2
Information Number on my Bill / Phone the Company	2.0	1.9	2.3
The Internet	30.5	32.4	23.9
The Government Or A Government Ministry	10.2	8.9	14.8
Media (NET):	7.9	7.0	11.4
Newspapers	6.2	4.8	11.4
The News Media	2.0	2.2	1.1
T.V.	1.0	1.3	-
DON'T KNOW	12.6	11.7	15.9

When asked where they would go for information about the gas industry, almost half of Enbridge and REM customers indicated that Enbridge was their main source of information. Almost a third of Enbridge customers and almost a quarter of REM customers utilize the Internet for obtaining information. None of the respondents indicated that they would go to an REM for this information.

REM customers also make use of government sources (14.8%), newspapers (11.4%), and REMs (11.4%). (See Exhibit 8)

9. Preferred Source Of Information About The Gas Industry

EXHIBIT 9

Q. 10 And which one source would you prefer to use for information about the gas industry? (DO NOT READ LIST.)

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
Actual	(403) %	(315) %	(88) %
Volunteered Sources Of Information:			
Gas Company (NET):	41.8	43.2	37.5
Enbridge Consumers Gas	40.0	41.3	35.2
The Internet	25.3	26.0	22.7
The Government Or A Government Ministry	7.2	6.0	11.4
Media (NET):	5.0	4.4	6.8
Newspaper	3.2	2.5	5.7
The News Media	1.0	1.0	1.1
Talk to Other People	1.5	1.9	-
DON'T KNOW	14.4	13.7	17.0

Customers indicated that the *one source* for obtaining information that they prefer to use is Enbridge, followed by the Internet. Similar to the previous question, REM customers are more inclined than Enbridge customers to make use of government sources, newspapers and REMs as their preferred source of information. Again, none of the respondents indicated that they would prefer to use an REM as a source of this information. (See Exhibit 9)

10. Total Use/Preferred Use Of Enbridge Consumers Gas As A Source Of Information About The Gas Industry

EXHIBIT 10A

Q. 11 (ASKED OF RESPONDENTS NOT MENTIONING "ENBRIDGE CONSUMERS GAS" AT QUESTION 9 OR 10) **Do** you rely on Enbridge Consumers Gas as a source of information about the gas industry?

Total Enbridge Consumers Gas And Direct Purchase Customers Not Mentioning Enbridge Consumers Gas Spontaneously	Total	Claimed Enbridge System Customers	Claimed REM Customers
	Actual	(242) %	(185) %
Would Use/Rely On Enbridge Gas:			
Yes	53.7	53.0	56.1
No	29.8	29.7	29.8
DON'T KNOW	2.5	2.7	1.8

EXHIBIT 10B (A Summary Of Questions 9, 10 And 11)

- Q. 9 If you wanted to find out more about the gas industry and changes in the gas industry, where do you think that you would go for information? (DO NOT READ LIST. PROBE: ANYWHERE ELSE YOU MIGHT LOOK FOR INFORMATION?)
- Q. 10 And which one source would you prefer to use for information about the gas industry? (DO NOT READ LIST.)
- Q. 11 (ASKED OF RESPONDENTS NOT MENTIONING “ENBRIDGE CONSUMERS GAS” AT QUESTION 9 OR 10) **Do** you rely on Enbridge Consumers Gas as a source of information about the gas industry?

Total Enbridge Consumers Gas And Direct Purchase Customers.	Actual	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(403) %	(315) %	(88) %
Would Use/Rely On Enbridge Gas:		80.6	81.0	79.5

Exhibit 10B provides a total of the residential customers who mention Enbridge Consumers Gas as a possible source of information at Question 9, 10 or 11.

In total, four out of five (80.6%) residential customers claim that they either currently rely on, or would use, Enbridge Consumers Gas as a source of information about the natural gas industry. Interestingly, REM customers are similarly predisposed to rely on Enbridge Consumers Gas, as are system customers. (See Exhibit 10B)

11. Use Of The Gas Bill A “Good Way” To Receive Information About The Gas Industry

EXHIBIT 11

Q. 12 Is the gas bill, or an insert with the gas bill, a good way to receive information about the gas industry?

Total Enbridge Consumers Gas And Direct Purchase Customers that use ECG, REM, Ontario Hydro and Local PUC as source of information	Total	Claimed Enbridge System Customers	Claimed REM Customers
Actual	(329) %	(257) %	(72) %
Gas Bill/Bill Insert A “Good Way” To Receive Information About The Gas Industry:			
Yes	86.3	86.8	84.7
No	13.1	12.8	13.9
DON'T KNOW	0.3	0.4	-

When asked whether the gas bill, or an insert with the gas bill, would be “a good way” to receive information about the gas industry, a clear majority (86.3%) of residential customers agree. REM customers are equally amenable to receiving information in this manner. (See Exhibit 11)

12. Perceived Reaction If You Were To Receive Marketing Information From An REM

EXHIBIT 12

Q. 13 (If you were purchasing your gas from an energy marketer), what would be your reaction if you were to receive marketing and other information from the (this) independent energy marketer, together with your Enbridge Consumers Gas bill? Would you say that your opinion would be...? (READ LIST.)

Total Enbridge Consumers Gas And Direct Purchase Customers	Actual	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(403) %	(315) %	(88) %
Perceived Opinion:				
Net: Very/Somewhat Favourable		49.9	46.1	63.6
Very Favourable		15.9	14.0	22.7
Somewhat Favourable		34.0	32.1	40.9
Neither Favourable Nor Unfavourable		19.4	20.3	15.9
Not Very Favourable		9.2	9.8	6.8
Not At All Favourable		17.9	19.4	12.5
Net: Not Very/At All Favourable		27.1	29.2	19.3
DON'T KNOW		3.7	4.4	1.1

Customer response was mixed to receiving information about REM's in their gas bill. Almost half of Enbridge customers and over 60% of REM customers responded favourably to this information channel. Not surprisingly REM customers are more positive in this regard than are Enbridge customers. (See Exhibit 12)

13. Incidence Of Experiencing/Hearing About Problems Concerning REMs

EXHIBIT 13

- Q. 15A Have you ever experienced any problems with an energy marketer?
 Q. 15B Have you ever heard of someone experiencing problems with an energy marketer?

Total Customers Ever Buying From An REM	Total	Claimed Enbridge System Customers	Claimed REM Customers
	Actual	(123) %	(35)* %
Experienced Problems:			
Yes	22.0	40.0	14.8
No	78.0	60.0	
DON'T KNOW			
Total Customers Never Buying From An REM	(275) %	(275) %	(-)
Heard Of Problems:			
Yes	20.4	20.4	-
No	78.9	78.9	-
DON'T KNOW	0.7	0.7	-

* Caution: Small base.

Slightly less than one-quarter (22%) of REM customers, past or present, have experienced a problem with a REM. Additionally, 20% of non-REM customers (past or present) have heard of someone else having a problem with a REM. (See Exhibit 13)

14. Volunteered Problems Experienced/Heard About Concerning REMs

EXHIBIT 14

Q. 15C What problems have you (experienced/heard about) concerning energy marketers?

Total Hearing About/Experiencing Problems	Actual	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(83) %	(70) %	(13)* %
Volunteered Problems:				
References To Deception/Misunderstanding (NET):				
They do not Live up to their Promises / Don't fulfill their Contract		3	35.	15.4
They do not Tell the Truth / Lie to get People to Sign up		1	17.	15.4
Don't give you all the Information Needed when you Sign up.			5.	-
The Contract has More Costs then they tell you			2.	-
References To Sales Tactics (NET):				
Some Door to Door Sales People are Pushy / Dishonest / Fast Talking		1	14.	15.4
People Sign Contracts and don't know what they are Signing for		1	14.	7.7
References To Billing/Administration Problems (NET):				
To Cancel is difficult as you can never get through to the Company Supplying the Gas			5.	-
After Signing up you Never Hear from the Marketers			4.	-
Price Increase / Prices keep going up		9.6	4.3	38.5
Keep Changing Suppliers so you Never know who your Dealing with		6.0	2.9	23.1
If there is a drop in Natural Gas Price, the People with Locked in Contracts do not benefit		2.4	2.9	-

* Caution: Small base.

The most commonly cited problems concerning REMs relate to their sales tactics and to perceived deception or misunderstanding. Less commonly cited problems include price increases subsequent to switching, references to billing or administrative problems, and difficulty in terminating a contract. (See Exhibit 14)

15. Incidence Of Experiencing/Hearing About Problems Concerning Enbridge Consumers Gas

EXHIBIT 15

- Q. 16A Have you ever experienced any problems with Enbridge Consumers Gas?
 Q. 16B Have you ever heard of someone experiencing problems with Enbridge Consumers Gas?

Total Customers Ever Buying From Enbridge Consumers Gas	Actual	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(395) %	(315) %	(80) %
Experienced Problems:				
Yes		12.9	12.4	15.0
No		87.1	87.6	85.0
		(9)	(0)	(8)
Heard Of Problems:				
Yes		22.2	-	25.0
No		66.7	-	75.0

Just over 1 in 10 (12.9%) of Enbridge customers (past or present) have experienced a problem with Enbridge, which is notably lower than the percentage of those experiencing problems among REM customers. An additional 22% have heard about problems with Enbridge.

16. Volunteered Problems Experienced/Heard About Concerning Enbridge Consumers Gas

EXHIBIT 16

Q. 16C What problems have you (experienced/heard about) concerning Enbridge Consumers Gas?

Total Hearing About/Experiencing Problems	Actual	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(53) %	(39)* #	(14)* #
Volunteered Problems:				
Service Is Poor		37.7	35.9	42.9
Billing Problems		26.4	35.9	-
Takes to Long to get Repairs Done		18.9	12.8	35.7
Gas Prices are to High		9.4	10.3	7.1
Charge to much for Service Calls		7.5	5.1	14.3

* Caution: Small base.

Among the few Enbridge customers who have experienced a problem with Enbridge (12.4% Exhibit 15), the problems relate to perceptions of poor customer service and some billing problems. (See Exhibit 16)

17. Incidence Of Ever Purchasing Natural Gas From Enbridge Consumers Gas And From An REM

EXHIBIT 17

- Q. 14A Has your household ever purchased natural gas through an energy marketer rather than from Enbridge Consumers Gas?
- Q. 14B Has your household ever purchased natural gas through Enbridge Consumers Gas rather than from an energy marketer?

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
Actual	(315) %	(315) %	(-) %
Ever Bought From An REM:			
Yes	11.1	11.1	-
No	78.3	87.3	-
DON'T KNOW	(88)	(-)	(88)
Ever Bought From Enbridge Gas:			
Yes	90.9	-	90.9
No	8.0	-	8.0
DON'T KNOW	1.1	-	1.1

Just over 1 in 10 (11%) current ECG customers are previous REM customers. Interestingly, 7% of this 11% (two-thirds) that said they used to buy from a REM, actually still are. (See Exhibit 17)

18. Demographic Profiles Of Customers

The tables that follow outline the demographic profile of the customers responding to the survey. Highlights are:

- Enbridge customers are more likely to be in their homes for less than 1 year versus REM customers (see Exhibit 18A)
- A larger percentage of REM customers have lived in their homes for 5 – 14 years (see Exhibit 18A)
- REM customers are more likely to have three or four adults in the household (see Exhibit 18B)
- REM customers are more likely to have one child or more than two children in the household
- Occupation, education, year of birth and number of wage earners were similar for both groups

EXHIBIT 18A Length Of Residence In “This Home”

Q. 300 How long have you lived in this home?

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
		(315)	(88)
	Actual	(315)	(88)
		%	%
Years Lived In This Home:			
2 Years Or Less	21.3	22.8	15.9
3 Or 4 Years	14.9	14.9	14.8
5 To 9 Years	16.9	15.6	21.6
10 Years Or More	45.9	45.4	47.7
DON'T KNOW	1.0	1.3	-

EXHIBIT 18B

Size Of Household

- Q. 305 How many adults 18 years or over do you have living in your household, including yourself?
- Q. 306 How many children 17 years or younger do you have living in your household?

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Claimed Enbridge System Customers	Claimed REM Customers
		Actual	(403) %
Number Of Adults:			
One	12.9	13.0	12.5
Two	57.6	57.8	56.8
Three Or More	26.3	25.4	29.5
Average Number	2.3	2.3	2.3
Number Of Children:			
None	54.1	54.3	53.4
Any	43.6	43.1	45.6
Average Number	1.9	1.9	2.0

EXHIBIT 18C

Occupation

Q. 307 What is your occupation?

Total Enbridge Consumers Gas And Direct Purchase Customers	Actual	Total	Enbridge System Customers	REM Customers
		(403) %	(315) %	(88) %

Occupation:

Blue Collar (Skilled and Unskilled):	26.6	26.7	26.1
Clerical/Secretarial	11.2	11.4	10.2
Professional	7.4	7.6	6.8
Retired/Unemployment	17.6	18.1	15.9
Housewife	7.4	8.3	4.5
Owner/Self-Employed	5.0	4.1	8.0
Other Manager	5.2	4.1	9.1
Health Care	4.0	3.5	5.7
Retail Sales	3.7	3.8	3.4
Electronic	3.2	3.5	2.3
REFUSED	4.2	4.4	3.4

**EXHIBIT 18D
Education**

Q. 308 What is the last level of education that you completed?

Total Enbridge Consumers Gas And Direct Purchase Customers	Actual	Total	Enbridge System Customers	REM Customer s
		(405) %	(162) %	(243) %
Education:				
Some High School Or Less		12.8	13.7	11.2
Completed High School		25.1	25.1	25.0
Some College/University		11.7	11.1	13.6
Completed College/University		44.9	44.4	46.6
REFUSED		3.0	3.5	1.1

**EXHIBIT 18E
Age And Gender**

Q. 309 RECORD SEX, DO NOT ASK.

Q. 310 In what year were you born?

Total Enbridge Consumers Gas And Direct Purchase Customers	Actual	Total	Enbridge System Customers	REM Customer s
		(405) %	(162) %	(243) %
Year of Birth				
1970 or After		7.2	7.6	5.7
1960 to 1969		21.6	20.3	26.1
1950 to 1959		28.5	28.9	27.3
Before 1950		31.3	30.8	33.0
REFUSED		11.4	12.4	8.0
Gender:				
Male		48.9	47.6	53.4
Female		51.1	52.4	46.6

EXHIBIT 18F
Wage Earners And Annual Household Income

- Q. 311 How many wage earners contribute to your total annual household income?
 Q. 312 Which of these income categories represents your total annual household income before taxes? Just stop me when I get to yours.

Total Enbridge Consumers Gas And Direct Purchase Customers	Total	Enbridge System Customers	REM Customers
Actual	(405)	(162)	(243)
	%	%	%

Number Of Wage Earners:

None	11.2	10.5	13.6
One	28.3	28.9	26.1
Two Or More	60.2	60.3	60.2
REFUSED	0.2	0.3	-

Total Annual Household Income:

Up To \$40,000	17.8	19.1	13.5
Over \$40,000 Up To \$70,000	24.8	24.8	25.0
Over \$70,000	31.6	30.2	36.4
REFUSED	24.3	24.4	23.9
DON'T KNOW	1.5	1.6	1.1

APPENDIX 1 – SURVEY

2000 BILLING PREFERENCE SURVEY

DISPLAY Hello, I'm (YOUR NAME) and I'm calling from Research Dynamics, a national market research company. We are conducting a survey of opinions on energy and billing issues.;

QA:S,
QT QA May I please speak with the person in the household who pays the natural gas bill?,

POST **IF NECESSARY, READ: WE ARE CONDUCTING A SURVEY AMONG HOUSEHOLDS WHICH USE NATURAL GAS. THIS SURVEY IS ABOUT SOME IMPORTANT BILLING ISSUES. WE ARE NOT SELLING ANYTHING, AND YOUR RESPONSES WILL BE HELD IN CONFIDENCE,**

AL YES,
NO,
DON'T KNOW;

DISPLAY First of all, I need to speak with households which buy their natural gas from various sources.

On your natural gas bill, there is a gas supply charge for the actual gas used, and a gas delivery charge to get the gas to your home. Other charges may appear, like water tank rental charges if you rent a tank, a charge if you finance any gas equipment, an administrative charge and a GST charge.

For this interview, we would like you to think about **ONLY TWO** of these charges from your gas bill: the gas **supply** charge and the gas **delivery** charge.

Now, some households buy their gas from an independent energy marketer, while others buy from Enbridge Consumers Gas. Regardless, Enbridge Consumers Gas is the company which actually delivers the gas to your home.

Q1:S, QT	Q1	First, just think about gassupply, not delivery. From what company do you buy your natural gas? Is it...,	
POST		IF NECESSARY: ENERGY MARKETERS INCLUDE SUNOCO, DIRECT ENERGY, UNION ENERGY, ETC.,	
AL		Enbridge Consumers Gas, or, an energy marketer, DON'T KNOW;	IF DON'T KNOW IN Q1, TERMINATE WATCH QUOTAS
DISPLAY		(Let us imagine for a moment that / You mentioned that) your household is buying natural gas from an energy marketer.;	IF OTHER AT Q.1, USE TEXT "YOU MENTIONED EARLIER THAT..."
Q2:S, QT	Q2	Which one of the following two billing options would you prefer? Assume that the amount you owe would be the same for each option. Would you prefer that...,	
POST		READ LIST. IF NECESSARY, READ: UNDER OPTION #2, ENBRIDGE CONSUMERS GAS WOULD CHARGE FOR DELIVERY AND ADMINISTRATION, WHILE THE ENERGY MARKETER WOULD CHARGE FOR THE ACTUAL GAS	
AL		You receive one bill which includes all gas charges, that is the Enbridge Consumers Gas delivery charge and gas supply charges that may be from an independent gas marketer. Or, You receive two bills , one from Enbridge with its charges, and the other from the energy marketer, with its charges, NO PREFERENCE, DON'T KNOW;	ROTATE THE TWO OPTIONS

Q3:S, QT	Q3 If you were to receive one bill which includes all gas charges, would you prefer to receive that one bill from Enbridge or from the energy marketer?,	ROTATE THE TWO OPTIONS
POST	IF NECESSARY: STILL ASSUMING THAT YOU ARE BUYING GAS FROM AN ENERGY MARKETER,	
AL	ENBRIDGE SENDS YOU THE GAS BILL, THE ENERGY MARKETER, NO PREFERENCE, DON'T KNOW;	
Q4:M, OPEN QT	Q4 Why do you say that?,	
POST	PROBE: ANY OTHER REASONS?;	
DISPLAY	<p>Now I'd like you to imagine that only the energy marketer has the option of including other products and services on the gas bill, such as charges for your electricity, or long distance telephone. These charges would be shown on their bill.</p> <p>(Still assuming that your household is buying natural gas from an energy marketer.);</p>	<p>IF ENBRIDGE CONSUMERS GAS AT Q.1, SHOW SENTENCE "STILL ASSUMING THAT ..."</p>
Q5:S, QT	Q5 Which one of the following two billing options would you prefer? ,	
AL	<p>Enbridge sends you the gas supply and delivery bill, Or, The energy marketer sends you the gas supply and delivery bill, which also <i>includes</i> charges for other products and services such as electricity or long distance telephone. NO PREFERENCE, DON'T KNOW;</p>	ROTATE THE TWO OPTIONS

Q6:S,
QT

Q6 And still assuming that the energy marketer can include other products and services, which of the following two billing options would you prefer? ,

AL

The **energy marketer** sends you the gas bill, which includes all the gas charges, as well as other products and services,
Or,
Two bills are sent to you, one from **Enbridge** with its part of the gas charges, and the other from the **energy marketer**, with its gas charges, as well as charges for other products and services,
NO PREFERENCE,
NEITHER,
DON'T KNOW;

ROTATE THE TWO OPTIONS

Q7:M OPEN,
QT

Q7 Do you have any concerns, or would you like to make any comments about the billing options that we have talked about?,

POST

IF NECESSARY: IF EARLIER, THE RESPONDENT MADE COMMENTS ABOUT ANY OF THE BILLING OPTIONS, BUT DOES NOT MENTION THEM HERE, PLEASE PROMPT THEM ;

Q8:S,
QT

Q8

I'm going to read some statements describing various aspects of household bill payment. I'd like you to think about bill payment, in general, and not just for natural gas. For each statement, please tell me whether you Agree Strongly, Agree Somewhat, Neither Agree Nor Disagree, Disagree Somewhat or Disagree Strongly.

MT

I receive more bills now than I did two or three years ago,
I prefer to pay my bills through automatic withdrawal from my bank account,
I would prefer to receive my bill electronically on my PC
I would prefer to have several of my bills consolidated onto just one bill,
I prefer to receive a separate bill from each company I deal with,
I like a lot of detail on my bills,
I think some bills are too detailed,
I think the natural gas bill is too detailed,
I read all of the information on my bills,
I usually just read the total owing on my bills,
I usually try to verify the amounts shown on the bills I receive,
I never really look at my bills except to find out how much I owe, ;

RANDOMIZE STATEMENTS

AL

AGREE STRONGLY,
AGREE SOMEWHAT,
NEITHER AGREE NOR DISAGREE,
DISAGREE SOMEWHAT,
DISAGREE STRONGLY;

Q9:M, OPEN

QT

Q9 If you wanted to find out more about the gas industry and changes in the gas industry, where do you think that you would go for information?,

POST

DO NOT READ LIST. PROBE: ANYWHERE ELSE YOU MIGHT LOOK FOR INFORMATION?,

AL

ENBRIDGE CONSUMERS GAS,
ENERGY MARKETERS,
ONTARIO HYDRO,
LOCAL UTILITY/P.U.C.,
UNION ENERGY,
HEATING CONTRACTOR,
THE GOVERNMENT OR A GOV'T MINISTRY,
THE LOCAL LIBRARY,
THE INTERNET,
OTHER (SPECIFY),
DON'T KNOW;

IF MORE THAN ONE SOURCE MENTIONED AT Q.9, ASK

OTHERS GO TO Q.11

Q10:S,

QT

Q10 And which one source would you prefer to use for information about the gas industry?,

POST

DO NOT READ LIST,

AL

ENBRIDGE CONSUMERS GAS,
ENERGY MARKETERS,
ONTARIO HYDRO,
LOCAL UTILITY/P.U.C.,
UNION ENERGY,
HEATING CONTRACTOR,
THE GOVERNMENT OR A GOV'T MINISTRY,
THE LOCAL LIBRARY,
THE INTERNET,
OTHER (SPECIFY),
DON'T KNOW;

	IF ENBRIDGE CONSUMERS GAS NOT MENTIONED IN Q9 OR Q10, ASK	OTHERS GO TO Q12
Q11:S, QT	Q11 Do you rely on Enbridge Consumers Gas as a source of information about the gas industry?,	
AL	YES, NO, DON'T KNOW;	
	IF ANY OF CODES 1-4 MENTIONED IN Q9 OR Q10, OR IF YES AT Q11, ASK	OTHERS GO TO Q13
Q12:S, QT	Q12 Is the gas bill, or an insert with the gas bill, a good way to receive information about the gas industry?,	
AL	YES, NO, DON'T KNOW;	
Q13:S, QT	Q13 (If you were purchasing your gas from an independent energy marketer), What would be your reaction if you were to receive marketing and other information from the(this) independent energy marketer, together with your Enbridge bill? Would you say that your opinion would be...?,	IF ENBRIDGE CONSUMERS GAS AT Q1, ADD QTEXT "IF YOU WERE PURCHASING YOUR GAS FROM AN INDEPENDENT ENERGY MARKETER"...THIS
POST	READ LIST,	
AL	Very Favourable, Somewhat Favourable, Neither Favourable Nor Unfavourable, Not Very Favourable, Or, Not At All Favourable, DON'T KNOW;	

	IF ENBRIDGE CONSUMERS GAS IN Q1, ASK	OTHERS GO TO Q14B
Q14A:S, QT	Q14A Has your household ever purchased natural gas through an energy marketer rather than from Enbridge Consumers Gas?,	
AL	YES, NO, DON'T KNOW;	
	IF MARKETER IN Q1, ASK	OTHERS GO TO Q15A
Q14B:S, QT	Q14B Has your household ever purchased natural gas through Enbridge Consumers Gas rather than from an energy marketer?,	
AL	YES, NO, DON'T KNOW;	
	IF YES AT Q14A OR ENERGY MARKETER AT Q1, ASK	OTHERS GO TO Q15B
Q15A QT	Q15A Have you ever experienced any problems with an energy marketer?,	
AL	YES, NO, DON'T KNOW;	
	IF NO/DON'T KNOW AT Q14A, ASK	OTHERS GO TO Q16A
Q15B QT	Q15B Have you ever heard of someone experiencing problems with an energy marketer?,	

AL	YES, NO, DON'T KNOW;	
	IF YES AT Q15A/B, ASK	OTHERS GO TO Q16A
Q15C: M OPEN QT	Q15c What problems have you (experienced/heard about) concerning energy marketers?;	
	IF YES AT Q14B OR ENBRIDGE CONSUMERS GAS AT Q1, ASK	OTHERS GO TO Q16B
Q16A QT	Q16A Have you ever experienced any problems with Enbridge Consumers Gas?,	
AL	YES, NO, DON'T KNOW;	
	IF NO/DON'T KNOW AT Q14B, ASK	OTHERS GO TO Q300
Q16B QT	Q16B Have you ever heard of someone experiencing problems with Enbridge Consumers Gas?,	
AL	YES, NO, DON'T KNOW;	
	IF YES AT Q16A/B, ASK	OTHERS GO TO Q300
Q16C: M OPEN QT	Q16c What problems have you (experienced/heard about) concerning Enbridge Consumers Gas?;	
DISPLAY	I would now like to get some basic data about your household which will be used for classification purposes, only.;	
Q300:S,		

QT POST	Q300	How long have you lived in this home?, READ LIST IF NECESSARY,
AL		LESS THAN 1 YEAR, 1 OR 2 YEARS, 3 OR 4 YEARS, 5 TO 9 YEARS, 10 TO 14 YEARS, 15 OR MORE YEARS, DON'T KNOW;
Q305:Q QT	Q305	RANGE 1..9 DEFAULT 10, How many adults 18 years or over do you have living in your household, including yourself?;
Q306:Q QT	Q306	RANGE 0..9 DEFAULT 10, And how many children 17 years or younger do you have living in your household?;
Q307:M OPEN, QT POST	Q307	What is your occupation?, IF OCCUPATION OBVIOUS, DO NOT ASK TYPE OF INDUSTRY.;
Q308:S, QT AL	Q308	What is the last level of education you completed?, SOME GRADE SCHOOL, COMPLETED GRADE SCHOOL, SOME HIGH SCHOOL, COMPLETED HIGH SCHOOL, SOME COLLEGE/UNIVERSITY, COMPLETED COLLEGE/UNIVERSITY, OTHER, REFUSED;
Q309:S, QT	Q309	RECORD SEX. DO NOT ASK.,

AL	MALE, FEMALE;
Q310:Q QT	RANGE 1894..1982, Q310 In what year were you born?,
Q311:Q, QT POST	Q311 How many wage-earners contribute to your total annual household income?, PLEASE DO NO INCLUDE PENSIONERS AS WAGE-EARNERS;
Q312:S, QT	Q312 Which of these income categories represents your total annual household income before taxes? Just stop me when I get to yours.,
AL	Under \$15,000, \$15,000 To \$20,000, Over \$20,000 To \$30,000, Over \$30,000 To \$40,000, Over \$40,000 To \$50,000, Over \$50,000 To \$70,000, Over \$70,000 To \$90,000, Over \$90,000, REFUSED, DON'T KNOW;
DISPLAY	Thank respondent and end interview;

APPENDIX 2

GEOGRAPHIC DISTRIBUTION OF CURRENT FRANCHISE VS. SAMPLE

Customers with System Gas

<i>Region</i>	<i>Franchise Distribution</i>	<i>Sample Distribution</i>
Central Region	75.2%	70.80%
Eastern Region	15.3%	19.30%
Niagara Region	9.5%	9.90%

Customers with Direct Purchase Agreements

<i>Region</i>	<i>Franchise Distribution</i>	<i>Sample Distribution</i>
Central Region	76.4%	80.50%
Eastern Region	13.9%	9.50%
Niagara Region	9.7%	10.00%