



Residential Survey | Phase 4

CitiPower

September 2019



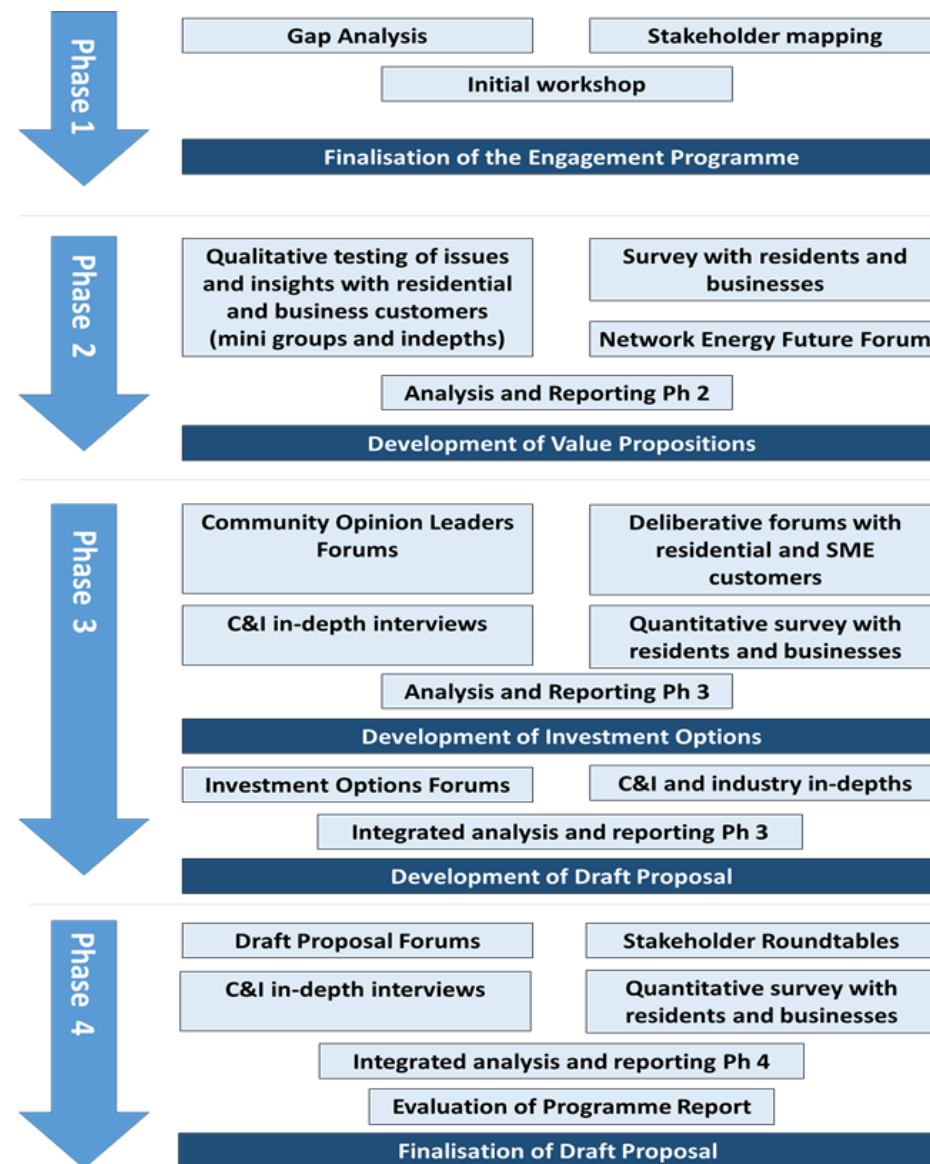
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APPROACH

BACKGROUND AND CONTEXT

- CitiPower is required to provide a regulatory proposal to the AER every five years, detailing its predicted expenditure and revenue requirements over the regulatory period.
- CitiPower is currently developing its regulatory proposal to the AER for the 2021-2026 regulatory period.
- To help shape this regulatory proposal, CitiPower is keen to further understand customer priorities, how they see the future, and to assess the Draft Plan.
- Woolcott Research and Engagement has been commissioned to conduct customer and stakeholder engagement to input into the preparation of the regulatory proposal.
- The business developed the Energised 2021-2026 program which includes four phases of customer and stakeholder engagement. We are currently in Phase 4.
- The aims of this phase are to investigate key issues for the network in more detail and fine tune the proposals for the Draft Proposal.



METHODOLOGY

- The objective of the current survey was to test which options customers preferred in the context of the total bill impact. Although respondents were asked for their choices for each question, and then had a chance to change these choices in the context of the whole bill impact, the results shown in this report are their 'final' answers in the context of the bill impact.
- The survey was conducted online and n=601 completes were obtained.
- The online respondents were sourced through an online panel provider, used solely for research purposes.
- The survey was live from 20/08/2019 to 11/09/2019.
- Data was weighted during the analysis by age and gender to reflect the United Energy area.
- Significance testing has been carried out at the 95% confidence interval. Results are shown in **bold green** where significantly higher and **bold red** where significantly lower than the total.
- In this report vulnerable customers are those who have had difficulty paying their electricity bills in the last 12 months, e.g. had to borrow money, had to ask for an extension or paid late, been on a special payment plan or been disconnected due to inability to pay.
- LOTE are customers who speak a language other than English at home.
- Note that due to rounding, percentages may not always add to 100

The survey covered the following areas:

- Knowledge and literacy
- Communication and customer service
- Access to real time data
- Solar enablement
- Digital network
- Resilient network
- Overall package
- Affordable network
- Demographics

SUMMARY OF FINDINGS

KEY FINDINGS

Distributor perceptions

- Similar to last year, most residential customers did not know the name of their electricity distributor (81%), with many confusing their retailer and distributor.
- When prompted, just over half are aware that the distributor responds to electricity outages, gets electricity to their homes and maintains poles and wires.
- Less than a third are aware that the distributor trims vegetation around powerlines.
- Reliability of supply and maintaining affordability continue to be the two most important values.

Improving customer service

- While most had not contacted CitiPower by phone (71%), many think that no change is needed to the speed of answering calls to the general enquiry line (77%).
- Text message is the preferred communication method for outages and faults, and email for consultation and other topics.
- Current communication around planned outages is felt to be adequate (3% or fewer of those who had experienced a planned outage were dissatisfied about timeliness of notification and quantity of information).
- Remotely reading smart meters is perceived to be important (69%), especially amongst younger respondents.

KEY FINDINGS

Access to real time data

- There is interest, especially amongst younger and vulnerable households, in using real time data to:
 - Monitor and adapt behaviours (58%);
 - Understand which appliances are using the most power (48%); and,
 - Checking the bill against their usage (43%).
- Although only 14% state that they wouldn't use it at all, less than half (46%) are willing to pay extra for more timely data, although more of the high usage customers (57%).

Solar enablement

- Although 71% of respondents with solar say they would still have got it if they couldn't export, only two in five of those considering indicate that they would get it if they could not export back to the grid.
- Saving money (74%) and environmental outcomes (65%) are key motivating factors to solar installation.
- 81% of respondents feel that customers should be able to export if they want to but there is a preference for only solar customers paying the additional cost to ensure this is possible.
- Those who believe that the costs should be smeared, think that the ability to export solar back to the grid should be increased up to 5kW (39%) or unlimited (41%).

KEY FINDINGS

Digital and resilient network

- 70% of respondents indicate that they want CitiPower to invest in technology to improve reliability and safety, with almost two in five also wanting to encourage renewable energy generation (38%).
- Most are happy with 1000 pole replacements a year (58%), although two in five respondents (42%) are willing to pay more to increase the number to 2000+.

Affordable network

- Most respondents indicate that they are willing to change their electricity usage times to save money (59%).
- It is felt that 'time of use' pricing should be an 'opt in' system (49%), rather than opt out (24%).
- Around two-thirds of respondents are interested in shifting their usage if they receive a monetary incentive with a further 12% interested dependant on the payment amount.

KEY FINDINGS

Overall package for 2021-2026

- When respondents were given the opportunity to look back over their choices in the context of the total bill impact, there were only slight changes made, the tendency being to choose options that involved paying more for improvements.
- Out of all the topics there is most willingness to invest in technology for reliability and safety (70%).
- Overall, 21% of respondents are *not* willing to pay for any changes, with 59% of respondents willing to pay up to \$15.00 extra/year for improvements.
- On average, CitiPower respondents are willing to pay \$9.80 additional on their annual bill.

KEY FINDINGS

Payment preferences

Ability to export solar power*		Investing in new technology		Access to data		Pole replacements			The speed to answer calls
No Change +\$0 Survey 20%		No Change +\$0 Survey 30%		No Change +\$0 Survey 54%		No Change +\$0 Survey 58%			No Change +\$0 Survey 77%
Improve Survey 80%		Improve Survey 70%		Improve Survey 46%		Improve Survey 42%			Improve Survey 23%
39% Option B All can export up to 5kW +\$3.50/yr	41% Option C All can export unlimited +\$20.00/yr	32% Option B Improve reliability & safety +\$3.50/yr	38% Option C Improve reliability safety, & encourage renewable generation +\$4.90/yr	23% Option B Next day w 15min intervals +\$1.20/yr	23% Option C Real time w 15min intervals +\$1.40/yr	29% Option B 2000 replacements/year +\$5.40/yr	8% Option C 3000 replacements/year +\$10.70/yr	5% Option D 5000 replacements/year +\$21.50/yr	23% Option B 30 sec or less to answer +\$2.00/yr

* Note that only a sub-set of the sample were asked this question (those who believed that all customers should pay). However, the majority believed that solar customers should pay rather than all customers.

DETAILED FINDINGS



DISTRIBUTOR PERCEPTIONS



UNPROMPTED AWARENESS OF DISTRIBUTOR

Perceived name of electricity distributor Unprompted	Total 2019 (n=601) %	18-34 Yr olds (n=237) %	35-54 Yr olds (n=203) %	55+ Yr olds (n=161) %	Total 2018 (n=625) %
CitiPower	19	11	18	32	22
Origin	13	13	15	12	12
AGL	10	17	8	4	11
Energy Australia	5	6	4	4	4
Red Energy	6	4	7	8	4
Win Energy	2	2	1	1	4
Momentum Energy	2	0	3	3	2
Simply Energy	2	3	1	3	2
Lumo	1	1	1	2	2
Alinta	2	1	2	5	1
Powershop	1	0	1	0	2
Powercor	1	1	0	1	1
Dodo	1	0	2	0	1
Click Energy	1	2	0	0	1
Don't Know	23	25	22	21	26
Other	11	14	15	4	5

- Around 1 in 5 respondents were aware that CitiPower was their distributor (similar to last year).
- Awareness was significantly higher amongst those aged over 55 years (32%).
- Vulnerable customers were significantly less likely to mention CitiPower as their distributor (7%).

Q9. Firstly, what is the name of your electricity distributor? By distributor, we mean the company responsible for the electricity network not your energy retailer who sends you the bill.
 Base: All respondents (n=601)

AWARENESS OF ROLES OF DISTRIBUTOR

Perceived roles	Total 2019 (n=601) %	18-34 Yr olds (n=237) %	35-54 Yr olds (n=203) %	55+ Yr olds (n=161) %	Total 2018 (n=625) %
Responding to electricity outages and interruptions	60	54	57	73	54
Getting electricity to your home	57	44	57	76	54
Maintaining electricity poles and wires	55	43	52	78	53
Connecting electricity to new homes	49	46	45	59	46
Maintaining and operating street lighting	39	29	43	48	38
Long term planning to ensure a resilient electricity supply	37	28	36	50	36
Trimming vegetation around powerlines	30	17	28	50	30
None of the above	18	22	18	11	27

- Respondents aged over 55 years were significantly more aware of all the roles of the distributor, while those aged between 18-24 years were significantly less aware.

RANKED IMPORTANCE OF BENEFITS/VALUES

	Total ranked 1 st (%)	18-34 ranked 1 st (%)	35-54 ranked 1 st (%)	55+ ranked 1 st (%)	Index score
Providing a reliable supply of electricity	64	56	64	76	27
Maintaining affordability	22	27	24	13	22
Committed to providing a safe environment for customers and workers	4	6	2	4	13
Use electricity when you want or receive savings for reducing use	2	2	3	2	11
Committed to providing a safe network that mitigates bushfire risks	2	2	0	3	8
Keeping your data and our network secure	1	1	1	0	6
Making it easier for you to export solar and charge your battery	2	3	3	1	5
Making it easier for you to connect	2	3	2	1	5
Making it easier for you to use your data to make informed choices	0	0	0	1	3

- Around two-thirds of respondents ranked providing a reliable supply of electricity as the most important value (64%), with those aged 55+ most likely to do so (76%).
- Vulnerable respondents were significantly less likely to rank reliable supply first.

Q11. As an electricity distributor, [insert distributor] ensures the safe and reliable supply of electricity, by maintaining poles and wires. [Insert distributor] is not an electricity retailer – they transport electricity to your home while retailers sell you the electricity. From the list below, please choose the five most important things when it comes to powering your home and rank them from one (1) most important to five (5) least important.

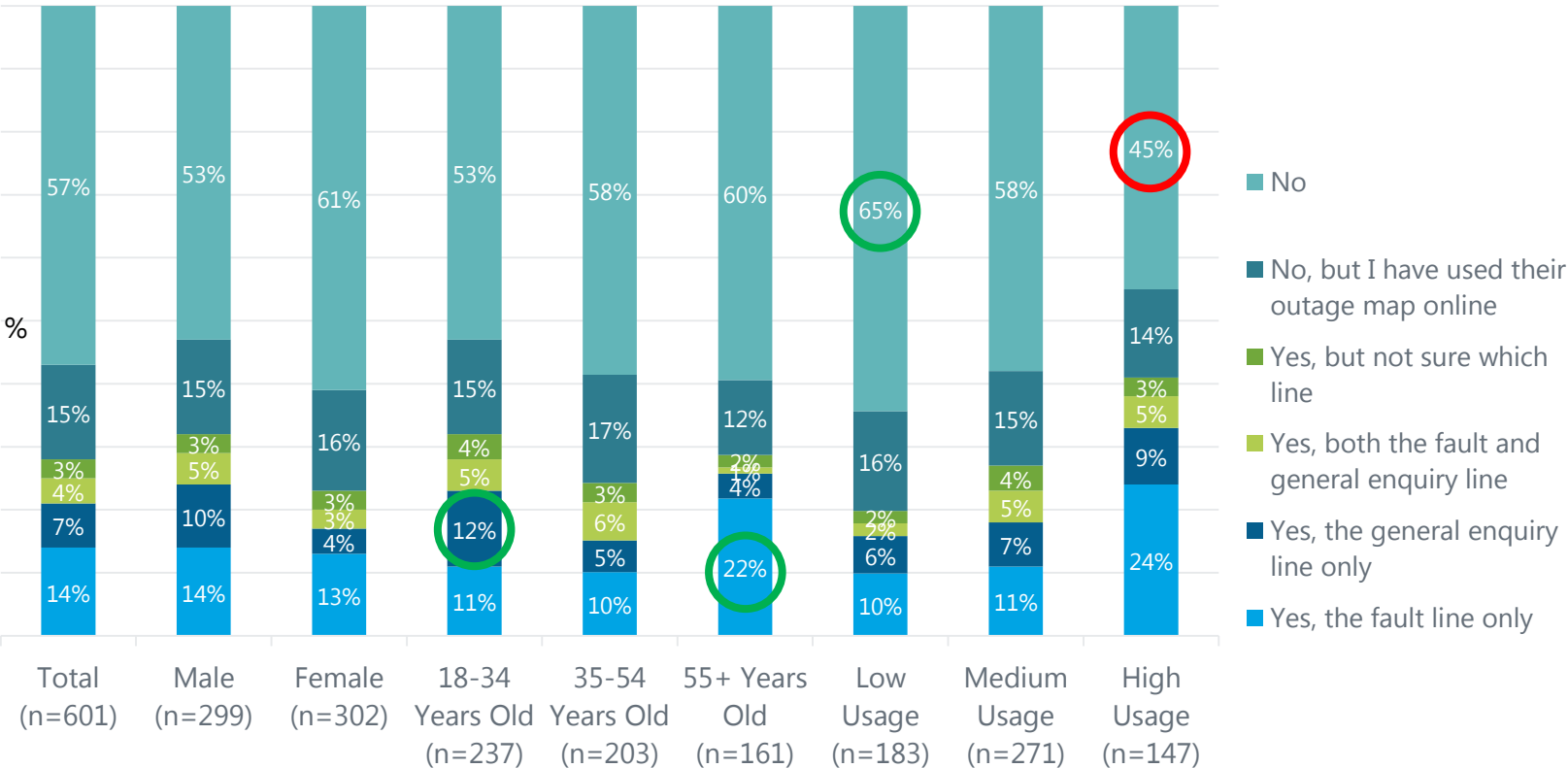
Base: All respondents (n=601)

The index score has been calculated by assigning a value of 5 points to the #1 ranking, 4 points to #2, 3 to #3, 2 to #4 and 1 point to #5 and then adding them together. This score was then indexed to be out of 100.

IMPROVING CUSTOMER SERVICE



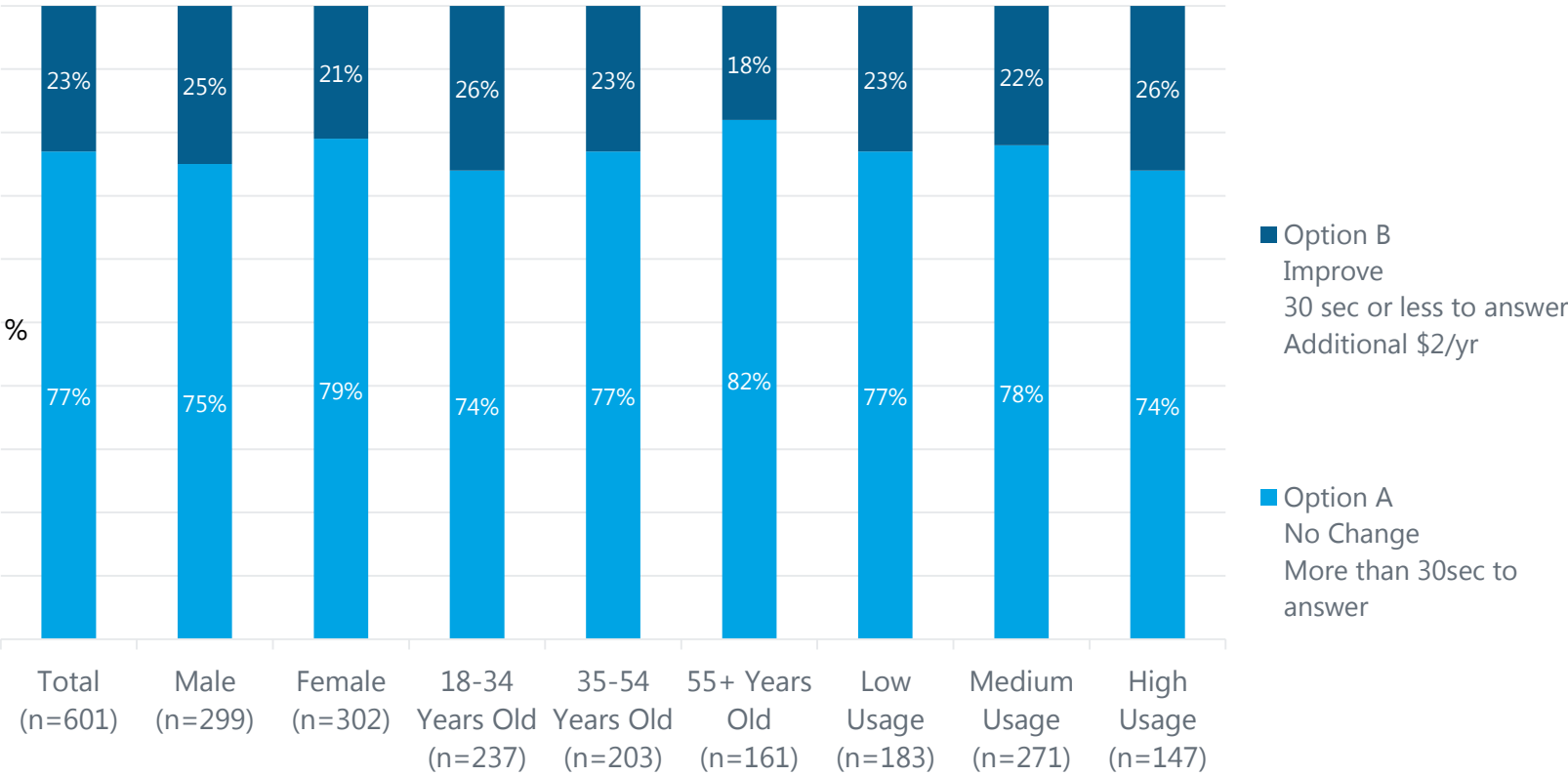
INCIDENCE OF CONTACTING DISTRIBUTOR



- The majority of respondents have not contacted CitiPower at all (57%), or have only used the outage map online (15%).
- 29% had used either the fault or enquiry line or both.
- High users were most likely to have contacted CitiPower.

Q13. Have you previously called [the distributor's] fault or general enquiry lines?
Base: All respondents (n=601)

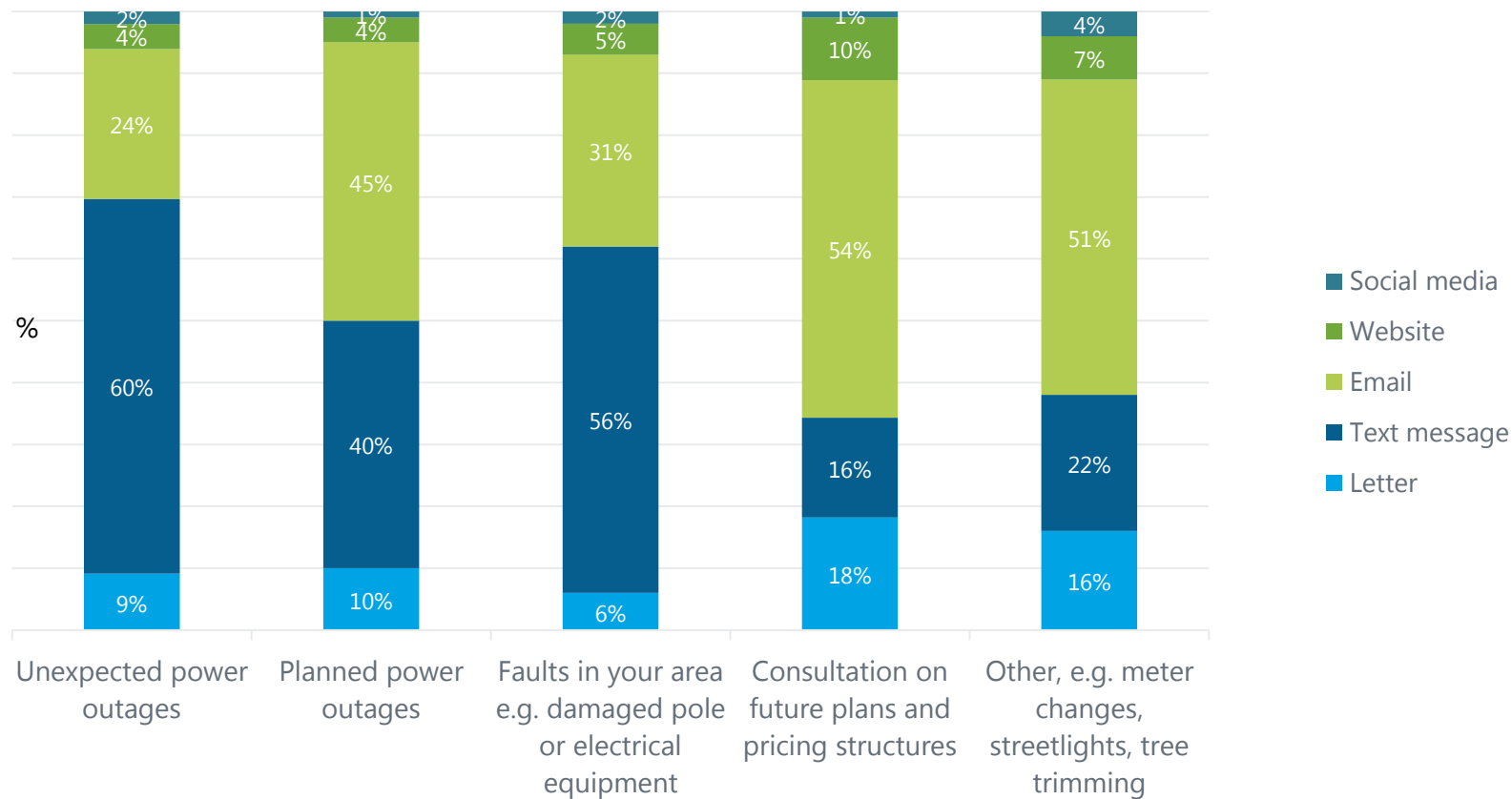
IMPROVING SPEED OF ANSWERING CALLS



- Over three quarters of respondents were happy to leave the length of time to answer calls at over 30 seconds.
- Those who had previously called CitiPower were slightly more likely to choose Option B (35%).

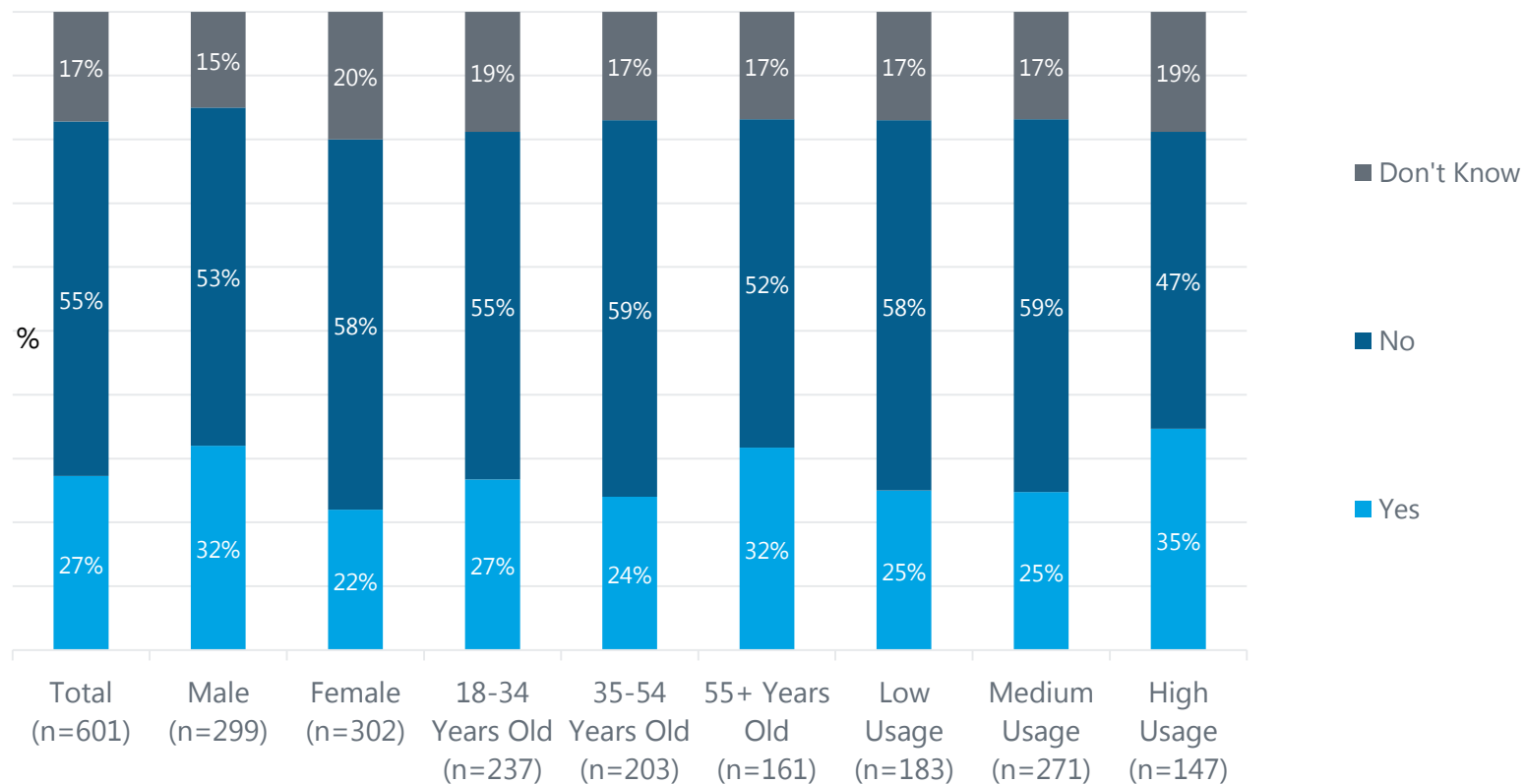
Q14a. Customer service is very important to [the distributor's name]. [Distributor] currently provides two manned call lines: a fault line and a general enquiry line. [Distributor] aims to answer calls to **the electricity fault line** within 30 seconds, while there is currently no standard response time for **the general enquiry line**. [the distributor] can ensure that calls to the general enquiry line are answered within 30 seconds as well, but this would cost a bit more. Which option would you prefer for the time taken for [insert distributor] to answer general enquiries (i.e. non-urgent calls)? *Answers provided after seeing full bill impact.*
Base: All respondents (n=601)

PREFERRED METHOD OF COMMUNICATION



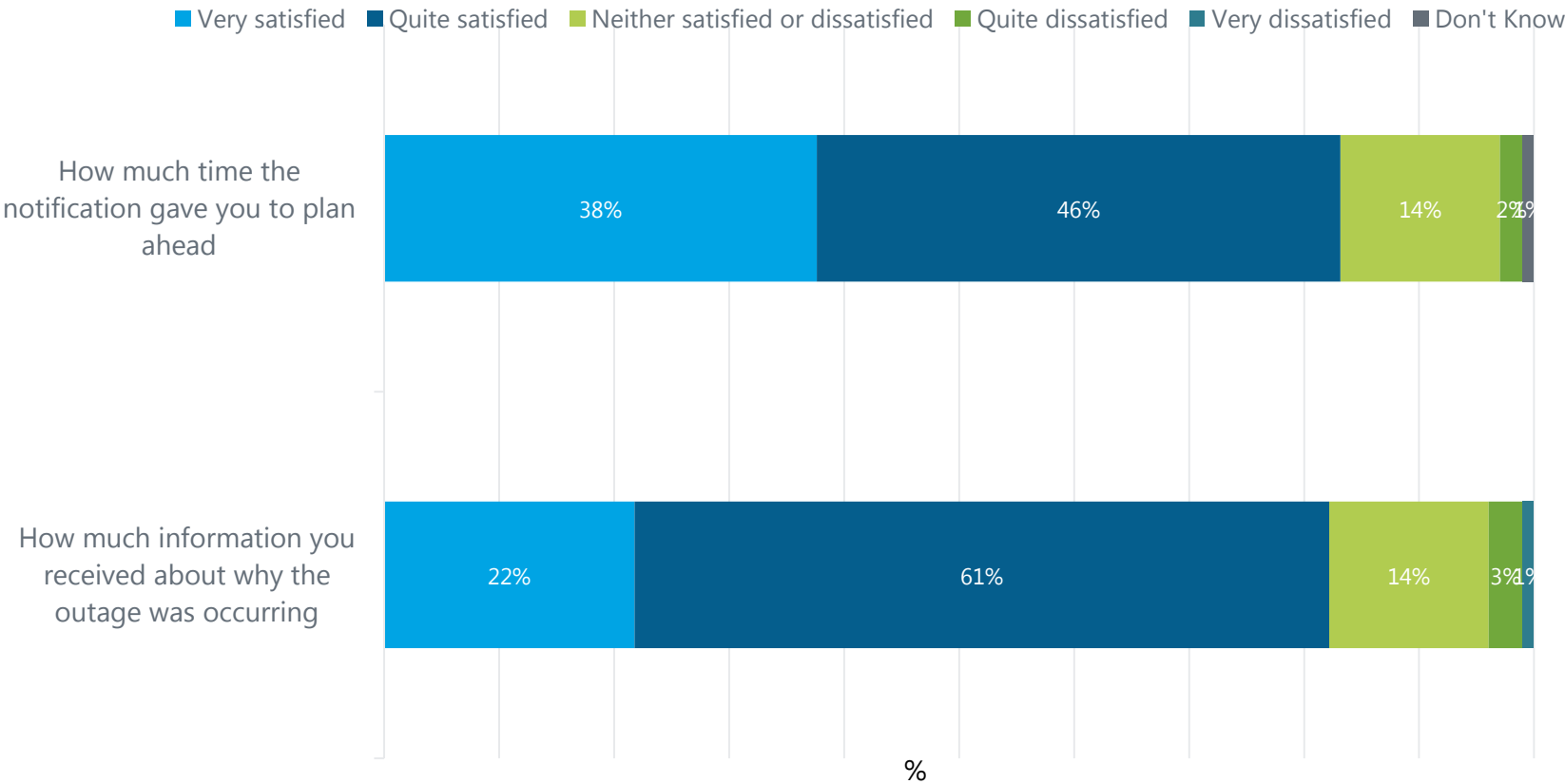
- Text message and email were the two preferred channels of communication depending on the topic.
- Texts were thought most appropriate for faults and unexpected power outages.
- Generally, those aged over 55 years were significantly more likely to prefer email and less likely to want communication via text message.

INCIDENCE OF NOTIFICATION OF A PLANNED OUTAGE



- Just over a quarter of respondents indicated that they had been notified about a planned outage.

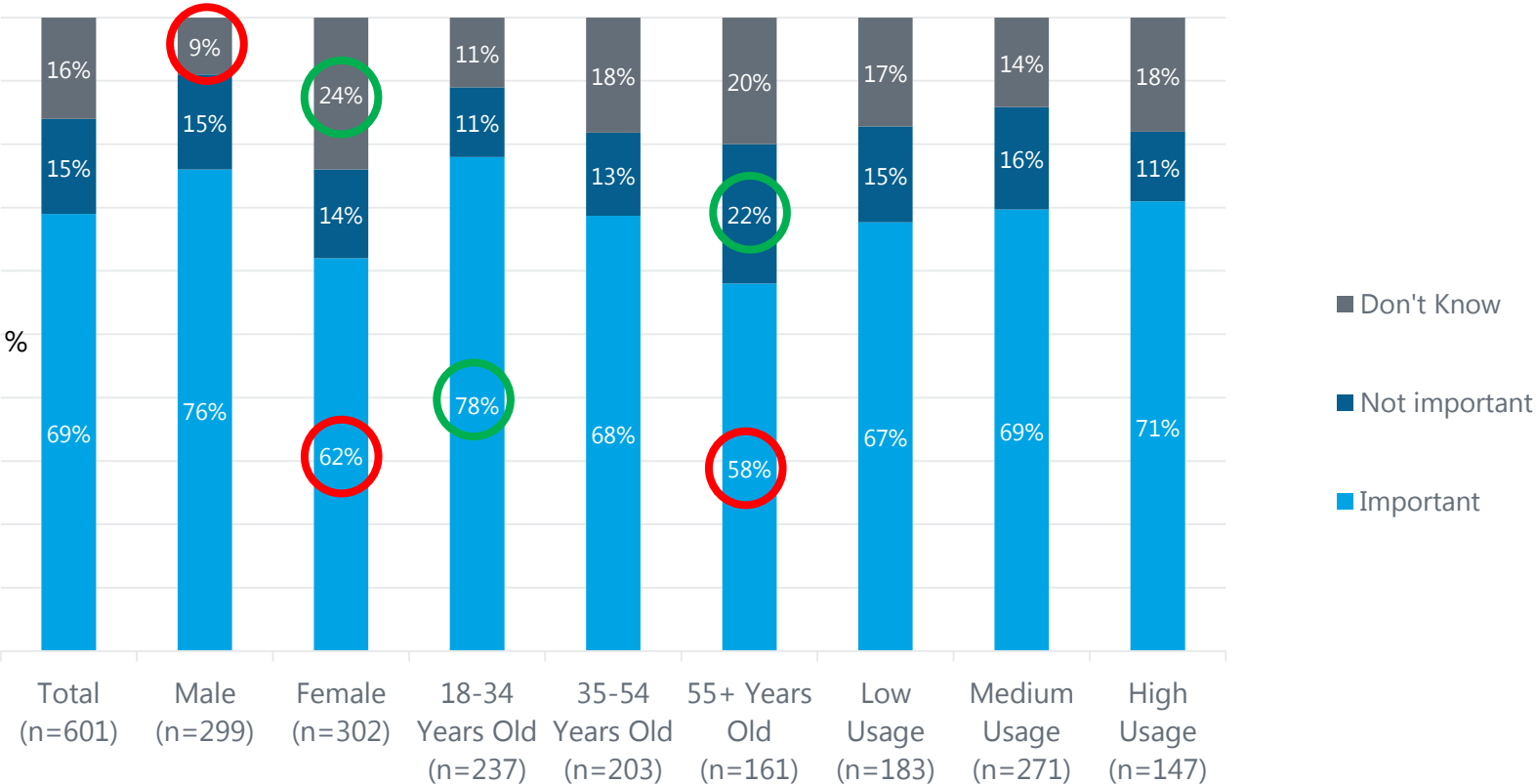
SATISFACTION WITH PLANNED OUTAGE COMMUNICATION



- Over 80% of respondents who had been notified of a planned outage were satisfied with the time the notification gave them to plan ahead and the information received.

Q17. How satisfied were you with...
How much time the notification gave you to plan ahead?
How much information you received about why the outage was occurring?
Base: Respondents who indicated they had been notified of a planned outage (n=158)

PERCEIVED IMPORTANCE OF REMOTELY READING SMART METERS



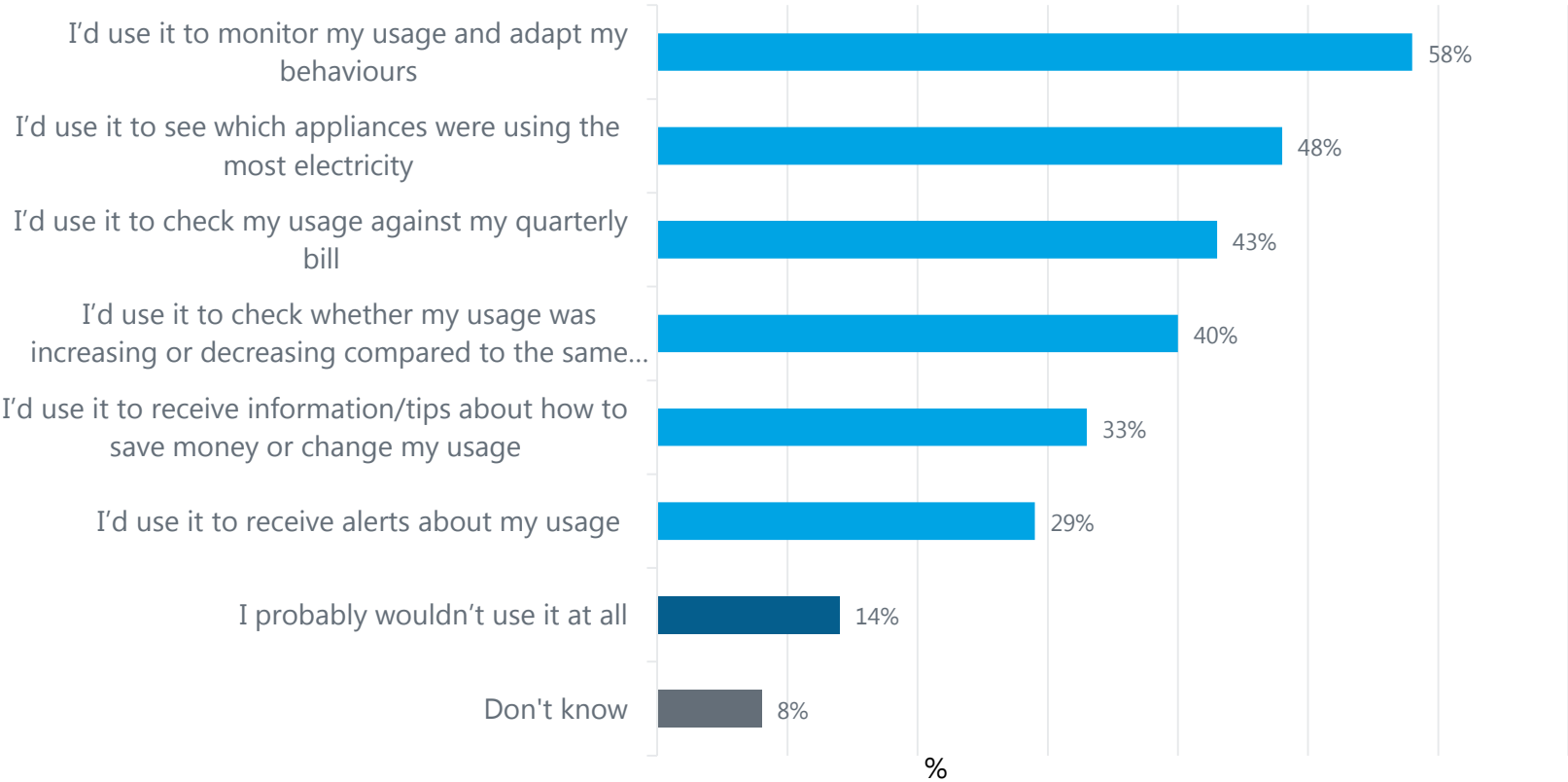
- More than two-thirds of respondents indicated that it was important for CitiPower to continue to remotely read and control the meter.
- Younger respondents were more likely to believe that it is important (78%).

Q18. Almost all Victorian households have a smart meter installed. Smart meters allow [insert distributor] to remotely read your meter, or remotely turn-on and turn-off electricity at your home when you move. This means [the distributor] doesn't have to send someone to the property, making the process quicker and cheaper. How important is it to you that they continue to remotely read your meter and remotely turn your power on and off when you move?
Base: All respondents (n=601)

ACCESS TO REAL TIME DATA



INTEREST IN ACCESS TO USAGE DATA



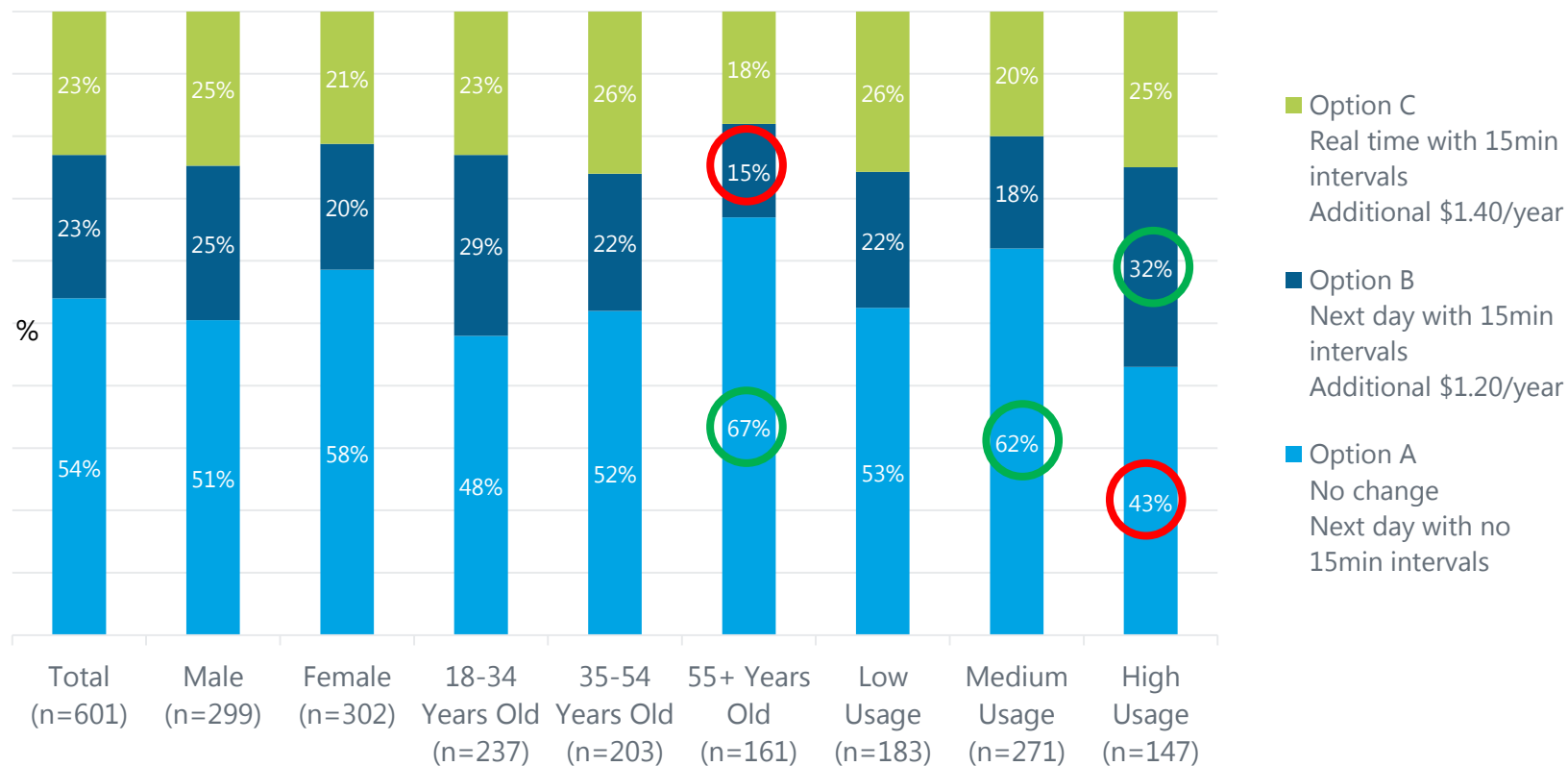
- More than half of respondents indicated they would use usage data to monitor and adapt their behaviours, this was significantly higher amongst 18-34 year olds (67%).
- 51% of 18-34 year olds and 56% of vulnerable customers also indicated they would check data against their bill.

[insert distributor] is considering giving customers access to their electricity usage data in near real-time (every 15-minutes) which would mean you could make on-the-spot decisions about your usage. It would also allow customers to more effectively participate in programs such as demand response where they can reduce their usage during certain times for a financial reward.

Q19. If you had easy access to your usage data on a mobile phone app for example, how do you think you would use it?

Base: All respondents (n=601)

PREFERENCE FOR ACCESS TO DATA



- More than half of the respondents were happy to keep the existing data usage breakdown at no extra cost (54%).
- Some groups were more likely to choose a change - high users (32%) and vulnerable customers (42%) were more likely to choose Option B.
- Those aged over 55 were more likely to choose no change (67%).

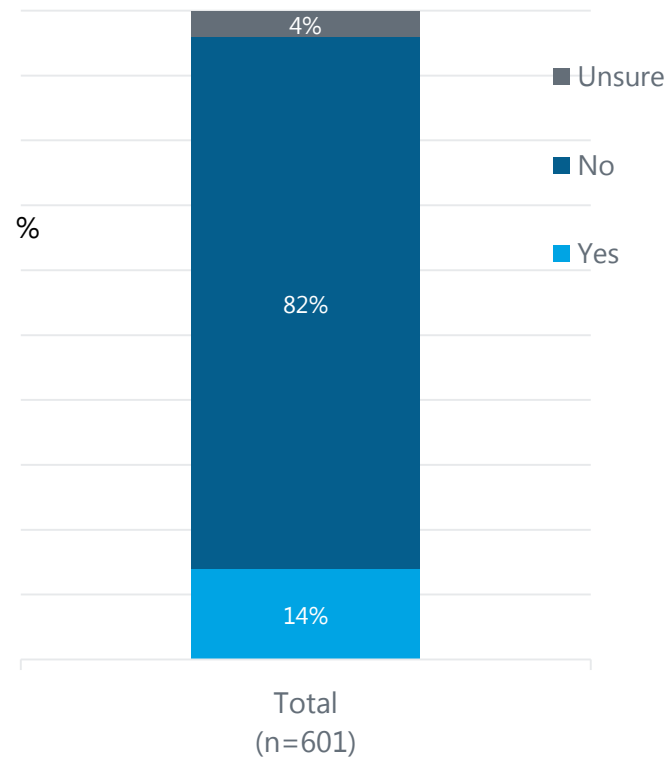
Q20a. In terms of providing the data on your usage, which option would you prefer? *Answers provided after seeing full bill impact.*
Base: All respondents (n=601)

SOLAR ENABLEMENT

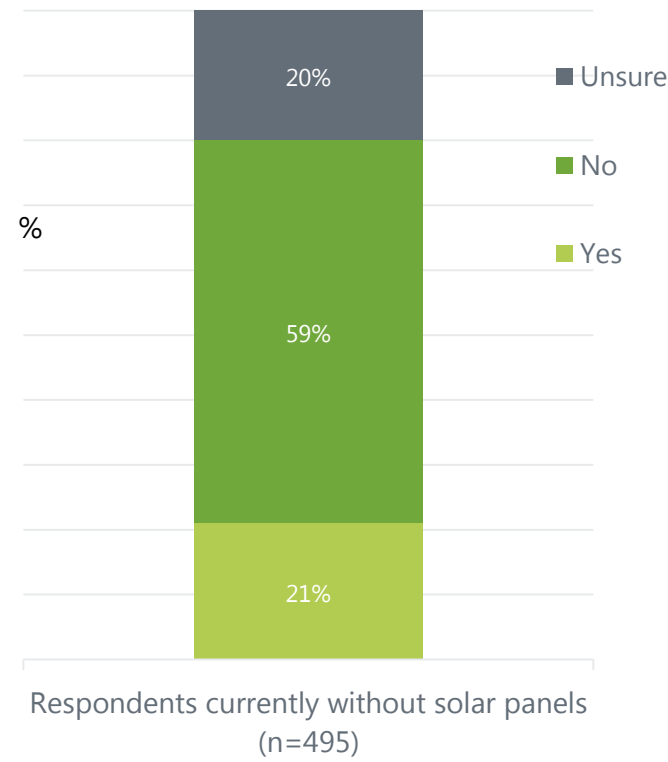


INCIDENCE OF & INTENTION TO GET SOLAR PANELS

Incidence of Solar Panels



Intention to install Solar Panels

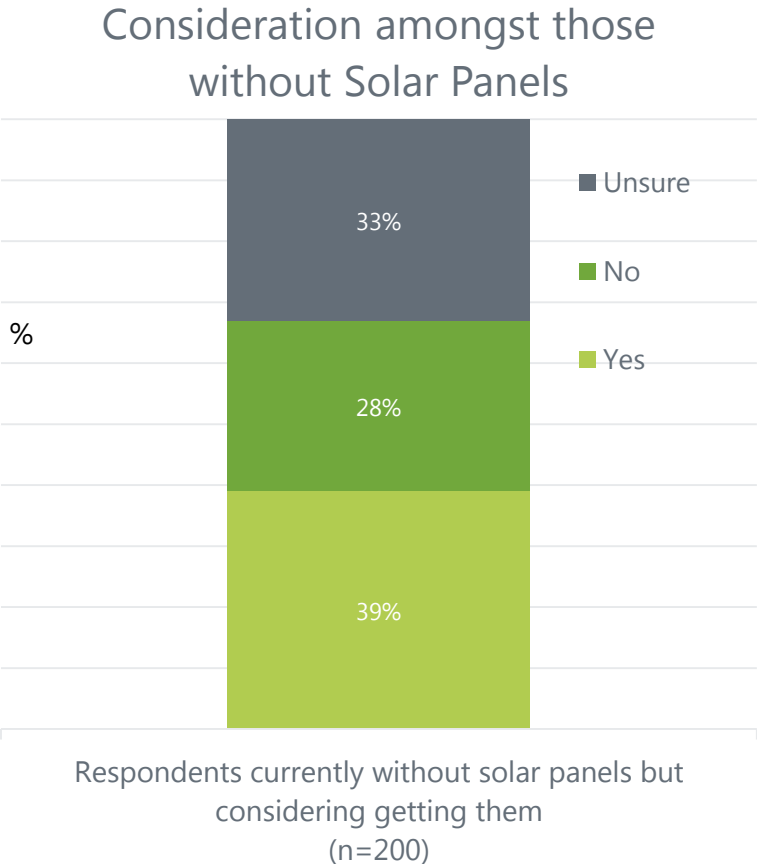
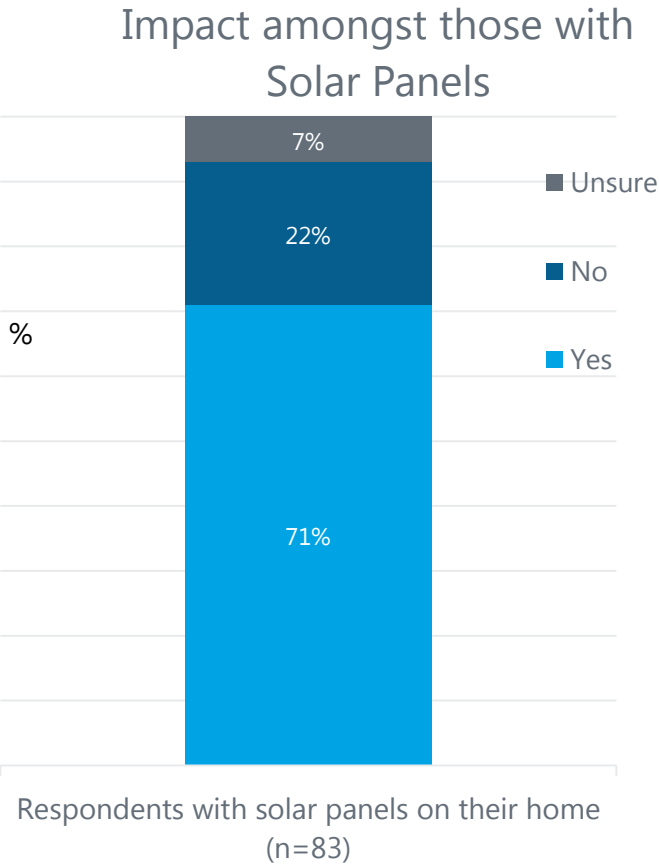


- 14% had solar panels, with 21% of those who don't intending to install in the next 3-5 years.
- High usage respondents were significantly more likely to indicate they have an intention to install solar in the next 2-5 years (33%).

Q21. Do you have solar panels on the home you are living in?
Base: All respondents (n=601)

Q22. Are you considering installing solar panels in the next 2-5 years in the home you are living in?
Base: Respondents currently without solar panels (n=495)

IMPACT OF EXPORTING SOLAR ELECTRICITY

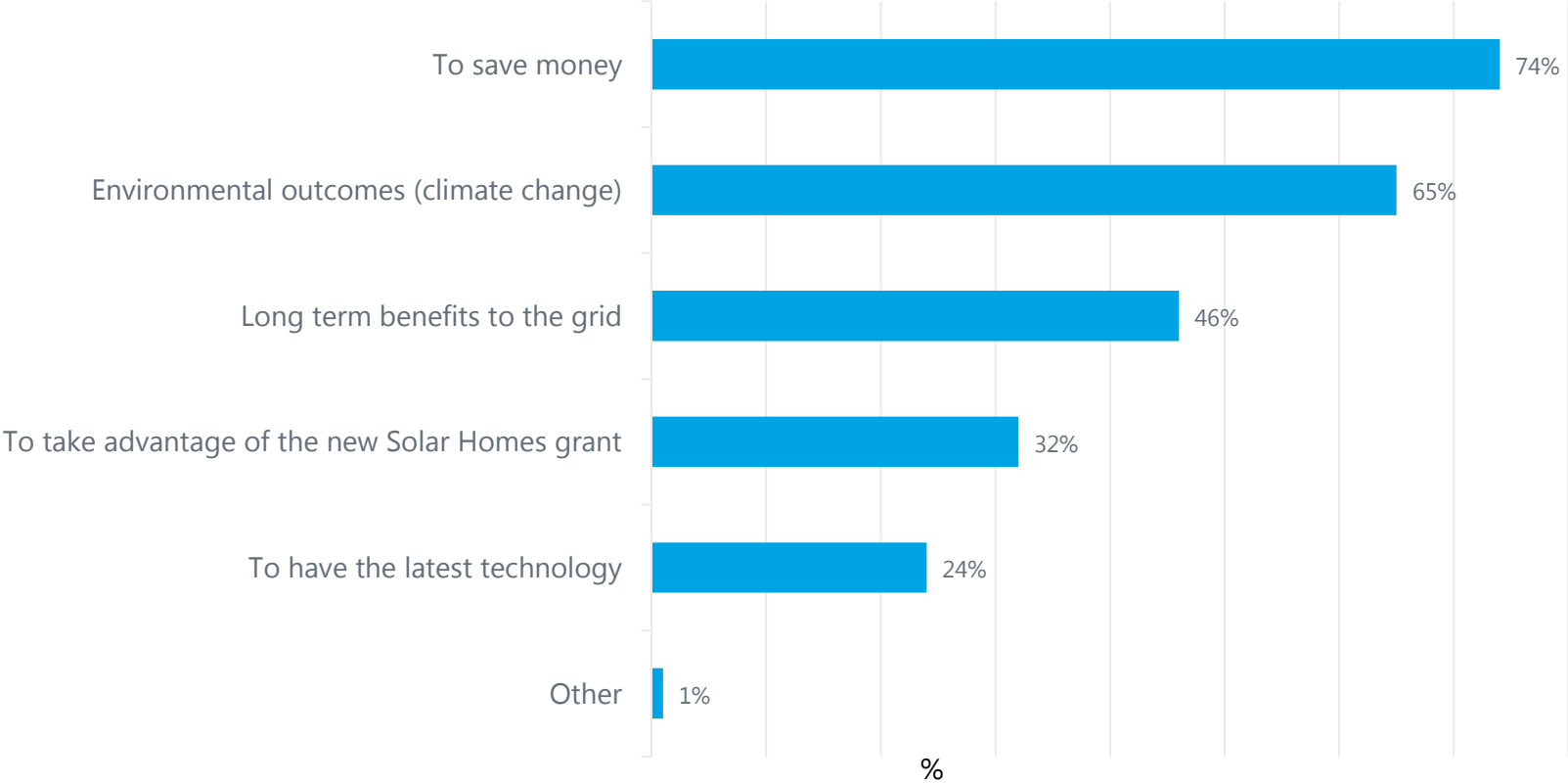


- Almost three quarter of respondents with solar installed reported that they still would have done so if they could not export (71%).
- However, only two in five respondents who do not currently have solar said they would install solar if they could not export (39%).

Q23. Would you have decided to install solar panels if you could not export excess solar at all? *If the property already had solar when you moved in then please answer as if you had decided to install it.*
Base: Respondents with solar panels installed on their home (n=83)

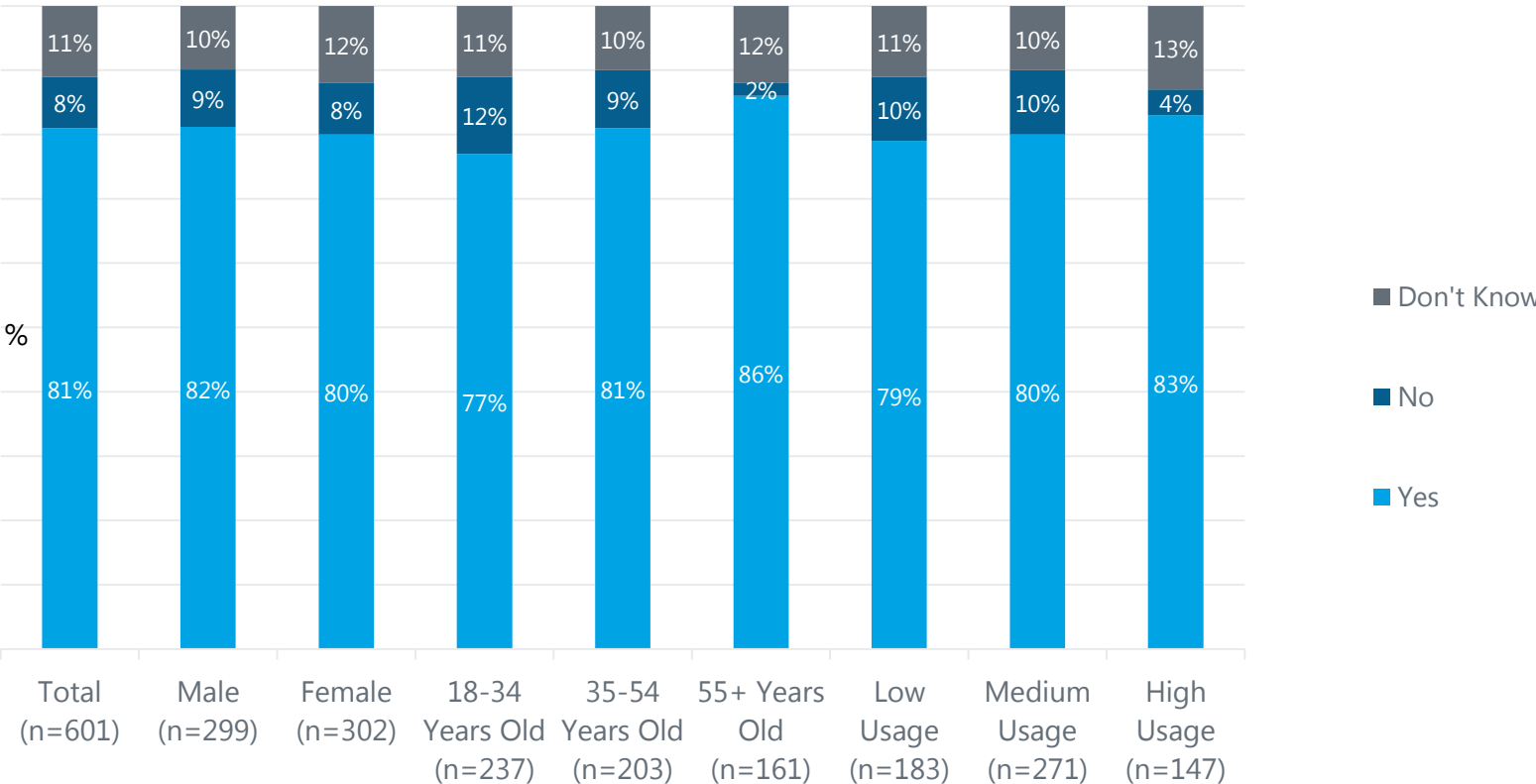
Q24. Would you install solar panels if you could **not** sell spare electricity from your solar on to the network??
Base: Respondents considering installing solar panels (n=200)

KEY MOTIVATORS TO INSTALL SOLAR PANELS



- Amongst those with solar or considering installing solar, the majority are motivated both primarily financially and environmentally.

ABILITY TO EXPORT BACK TO THE GRID



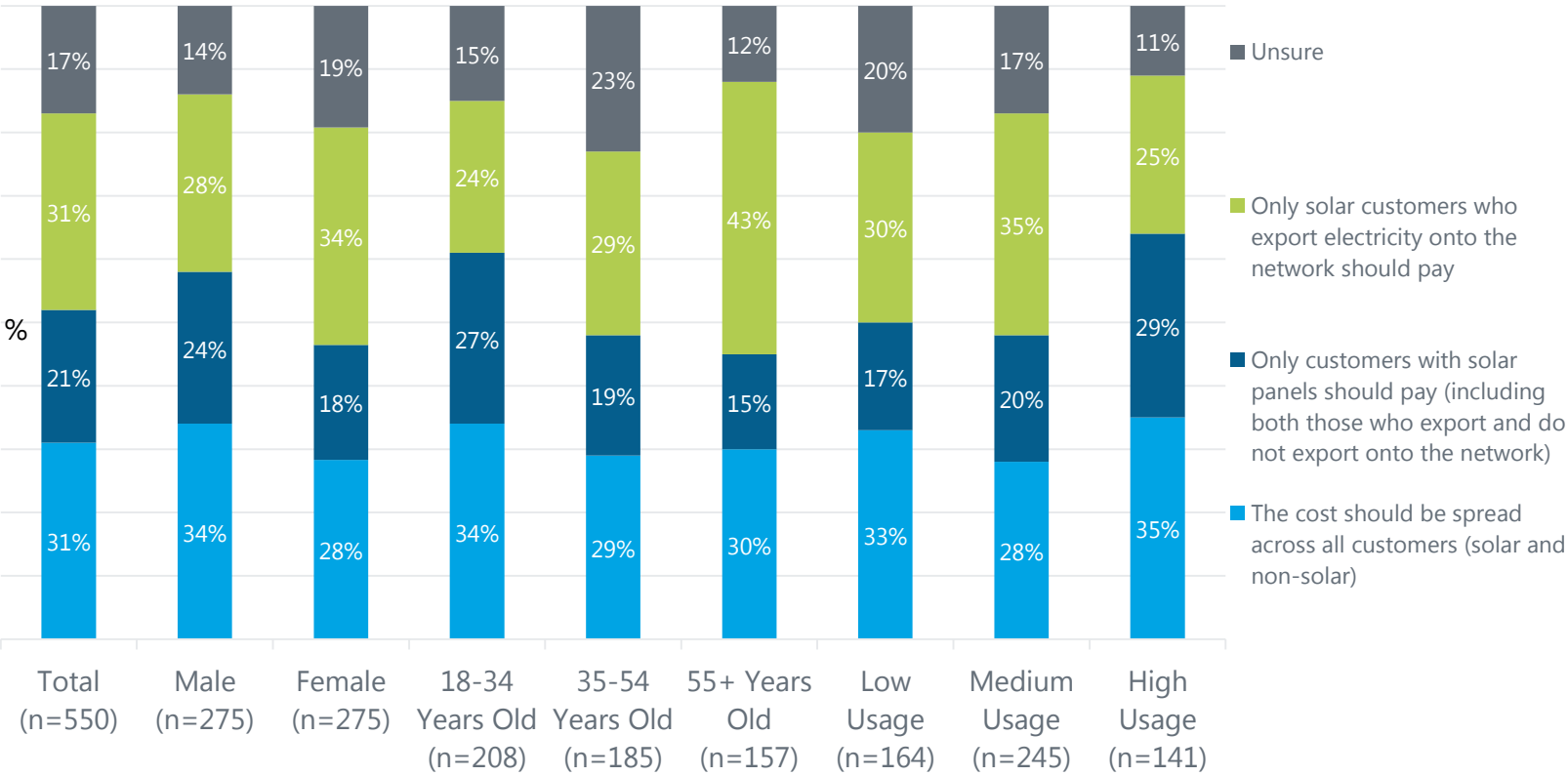
- 4 in 5 respondents believed that solar customers with spare electricity should be able to export electricity back onto the grid.

Currently many customers with solar panels are not able to export their spare electricity onto the network. This is because the network was not originally built to enable a two way flow of electricity and when there is too much electricity exported into the network it causes problems. Investment will need to be made to enable more residential customers with solar panels to export. In the long term the increase of solar and batteries on the network could benefit all customers by bringing down electricity prices for everyone (including those without solar).

Q26. Should solar customers be able to export spare electricity back onto the grid if they want to?

Base: All respondents (n=601)

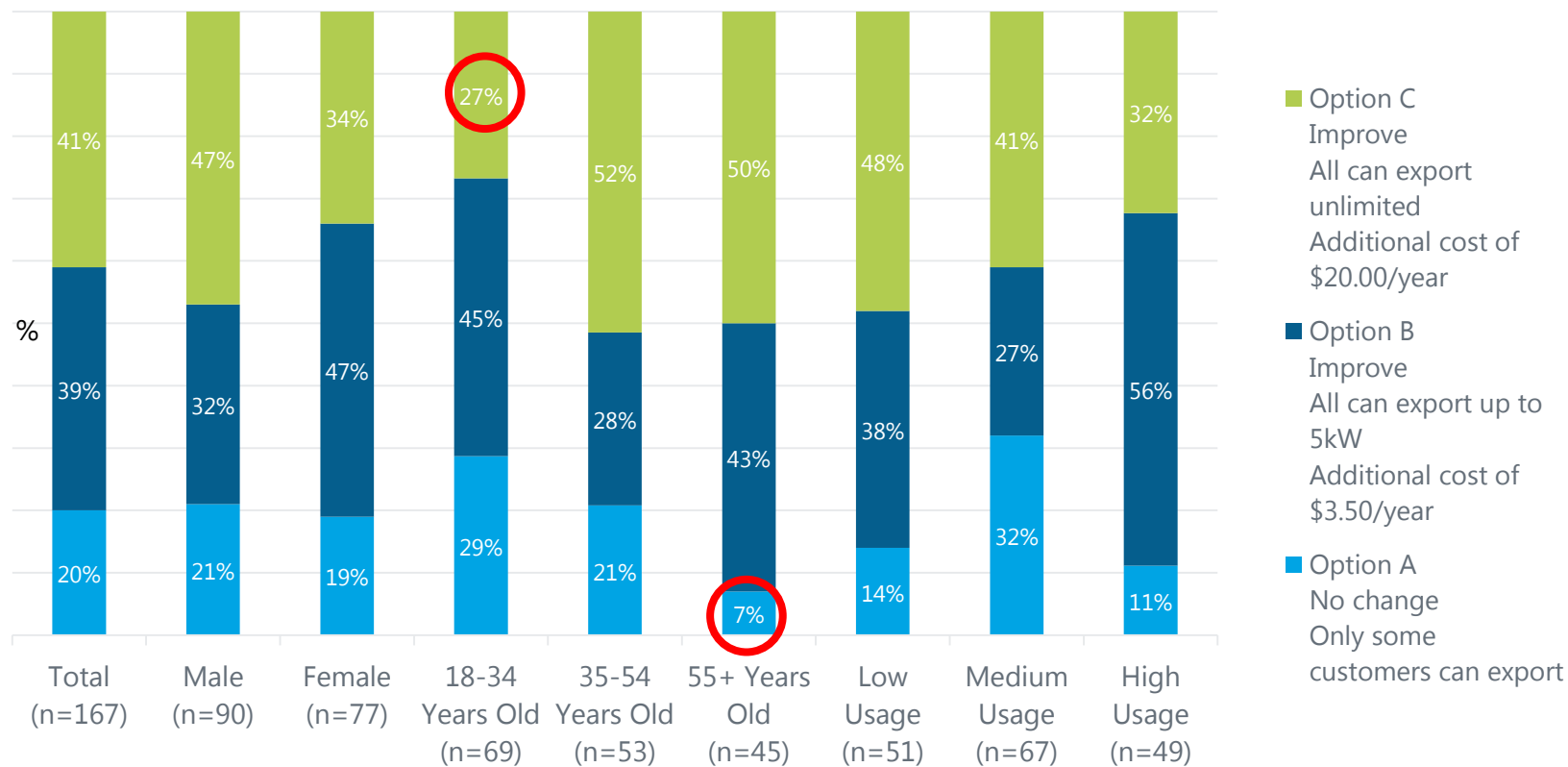
COST FOR EXPORTING BACK TO THE GRID



- Over half believed that solar customers should pay for the additional cost of ensuring customers can export (52%) with almost a third suggesting it should only be those who export (31%).
- A further third (31%) suggested all customers should pay.
- Those with solar were more likely to say all customers (52%) as were those considering solar (45%).

Q27. Who should pay for the additional cost of ensuring people with solar panels are able to export their spare electricity onto the network?
Base: Respondents who believe solar power should be able to be exported to the grid (n=550)

PREFERENCE FOR EXPORTING SOLAR POWER



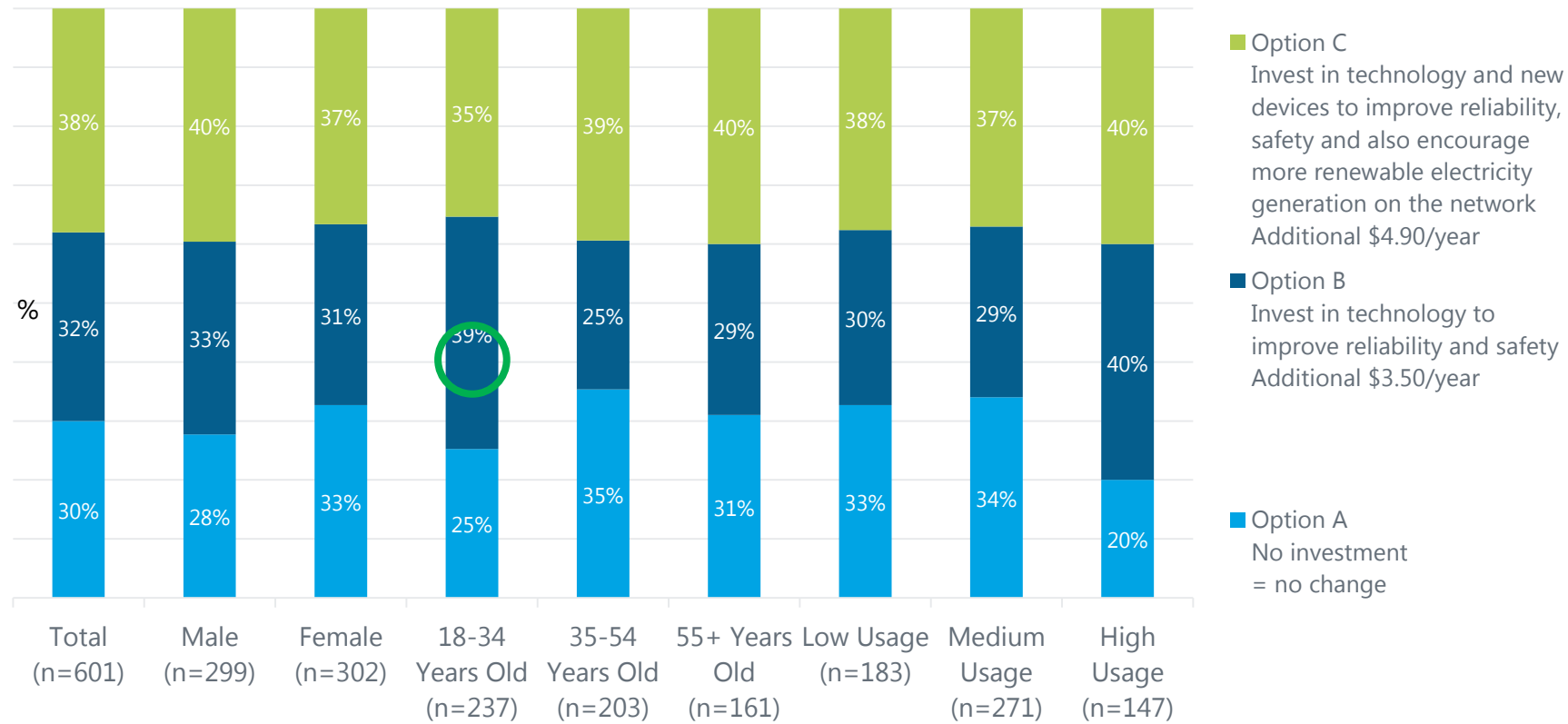
- 80% who thought the costs should be spread across all customers indicated a preference for improvement, which was quite evenly split between options B and C.
- Older age groups were more likely to choose the improvements.

Q28a. And which option would you prefer? *Answers provided after seeing full bill impact.*
Base: Respondents who think the cost should be spread across all customers (n=167)

DIGITAL & RESILIENT NETWORK



PREFERENCE FOR INVESTING IN TECHNOLOGY



- 70% of respondents wanted to see improvements in the investment into technology, at least to improve reliability and safety.
- However, younger respondents were more likely to choose Option B.

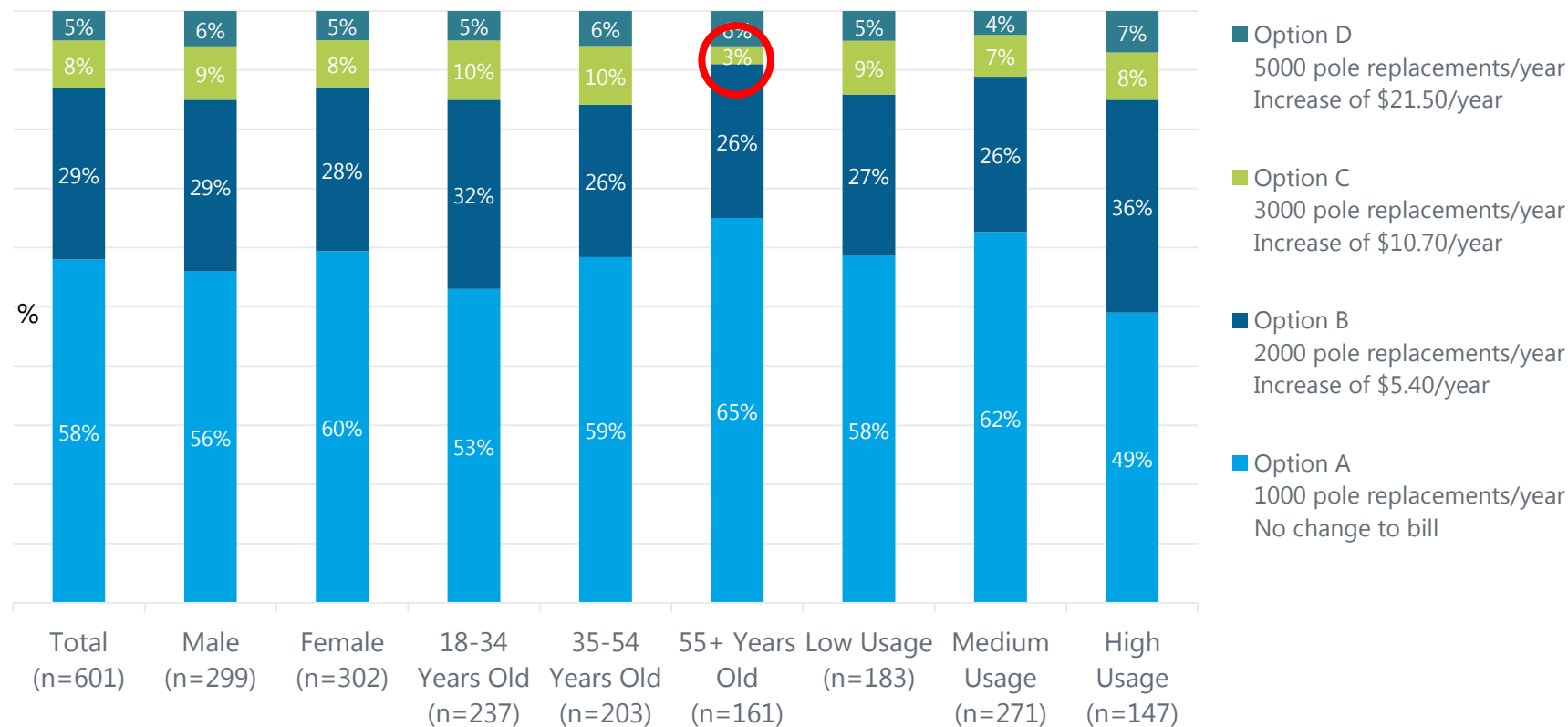
[the distributor] is looking at ways to use new technology to operate more efficiently and effectively. Although there would be a cost initially, in the longer term introducing this technology would reduce the costs of running the network and result in lower customer bills. The technology could be used in a number of programs, such as:

- developing better network pricing and demand management programs for customers,
- detecting electricity theft,
- managing the impact of Electric Vehicles on the network and
- helping to shift energy usage away from peak times to avoid the need for investment.

Q29a. Which option would you prefer? Answers provided after seeing full bill impact.

Base: All respondents (n=601)

PREFERENCE FOR POLE REPLACEMENTS



- The majority of respondents preferred no change to repair and replacement of poles (58%).
- 43% wanted some improvement, at least to Option B level.
- Younger respondents and high usage respondents were slightly more inclined to choose Option B than other groups.

Q29c. The safety of our power poles is important. Our regular inspection regimes, by fully trained and qualified inspectors, determine when poles need to be repaired or replaced. This is in line with strict regulations and audited by Energy Safe Victoria.

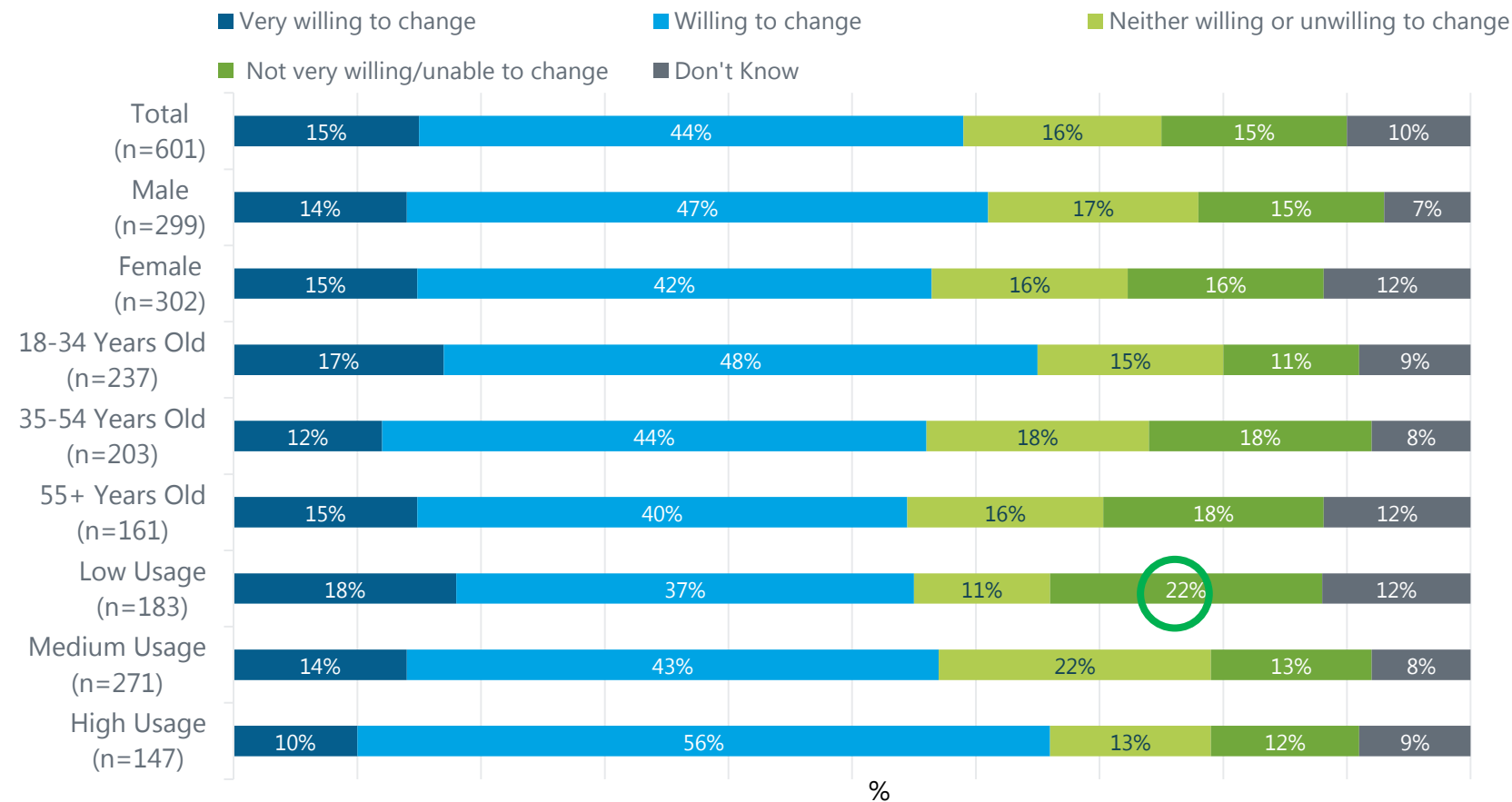
At the moment we replace 1,000 poles per year to strike a balance between cost and safety risk. There are four options for the future replacement of poles and wires provided below: the current option and three others that increase safety but also increase costs. Which option would you prefer?

Answers provided after seeing full bill impact.

Base: All respondents (n=601)

A blurred image of two people walking, overlaid with a word cloud containing terms like 'Inspiration', 'Experience', 'Innovation', and 'Network'.

WILLINGNESS TO CHANGE ELECTRICITY USAGE TIMES

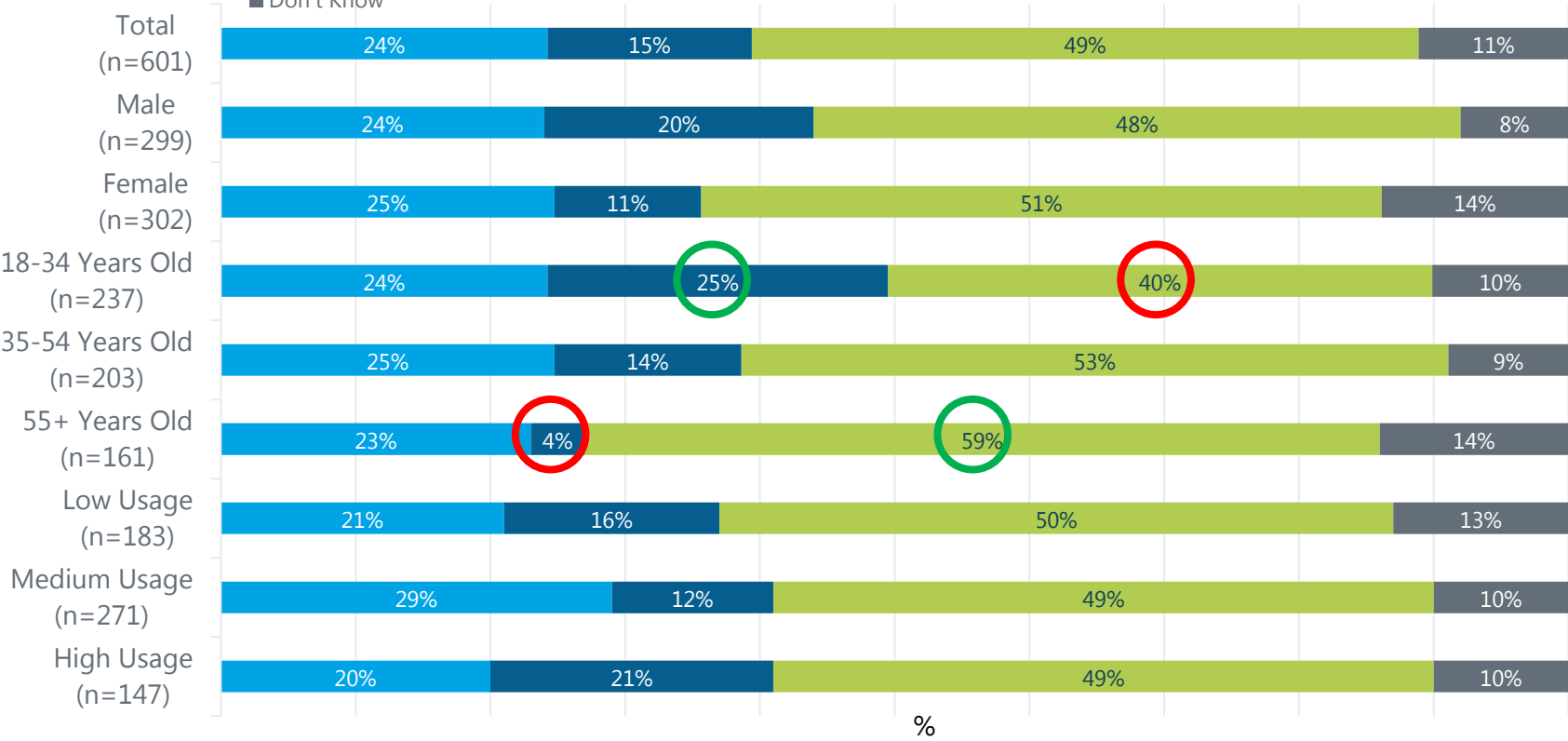


- 59% of respondents indicated that they are willing to change their electricity usage times to save money.
- Lower usage respondents were more likely to be not very willing or unable to change (22%).

Q33. [The distributor] is considering changing the way you pay for electricity – charging more at certain times of the day and less at others to encourage people to shift their electricity usage to times when electricity is cheaper. This new approach to billing is called 'Time of Use'. How willing and able would you be to change the times you use electricity if you could save money in doing so?
Base: All respondents (n=601)

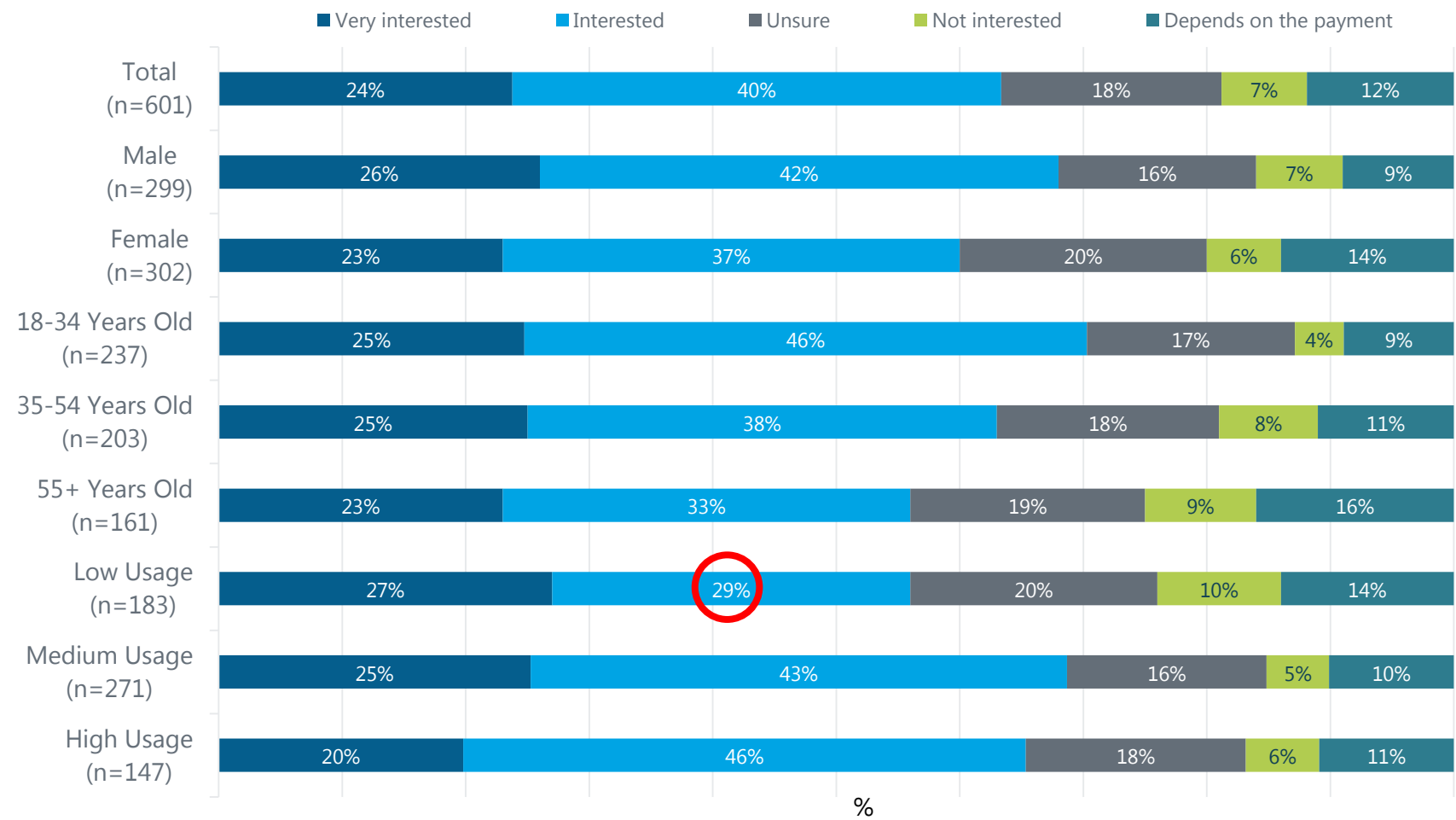
TRANSITIONING TO 'TIME OF USE' PRICING

- Everyone should be put on it straightaway (unless they 'opt out') so everyone can start to use electricity at times when it is cheaper
- New homes, homes with solar and homes with electric vehicle charging should be put on it straightaway
- People should be able to 'opt in' to the new system (choose whether they want the new tariff and savings proposed or they want to stay with the current flat rate)
- Don't Know



- There is a preference for residents to be able to 'opt in' to the new system, particularly amongst those aged 55+ (59%).

MONETARY INCENTIVE FOR SWITCHING TO MONETARY INCENTIVE FOR SHIFTING USAGE



- Around two-thirds of respondents were interested in shifting their usage if they were to receive a monetary incentive.
- This was slightly lower amongst low users.

Q35. [Distributor name] can offer payments directly to customers to ask them to reduce some of their electricity usage from 'peak usage times' (normally the late afternoon and evening). Would you be interested in receiving a payment for shifting your electricity usage?
Base: All respondents (n=601)

OVERALL PACKAGE FOR 2021-2026



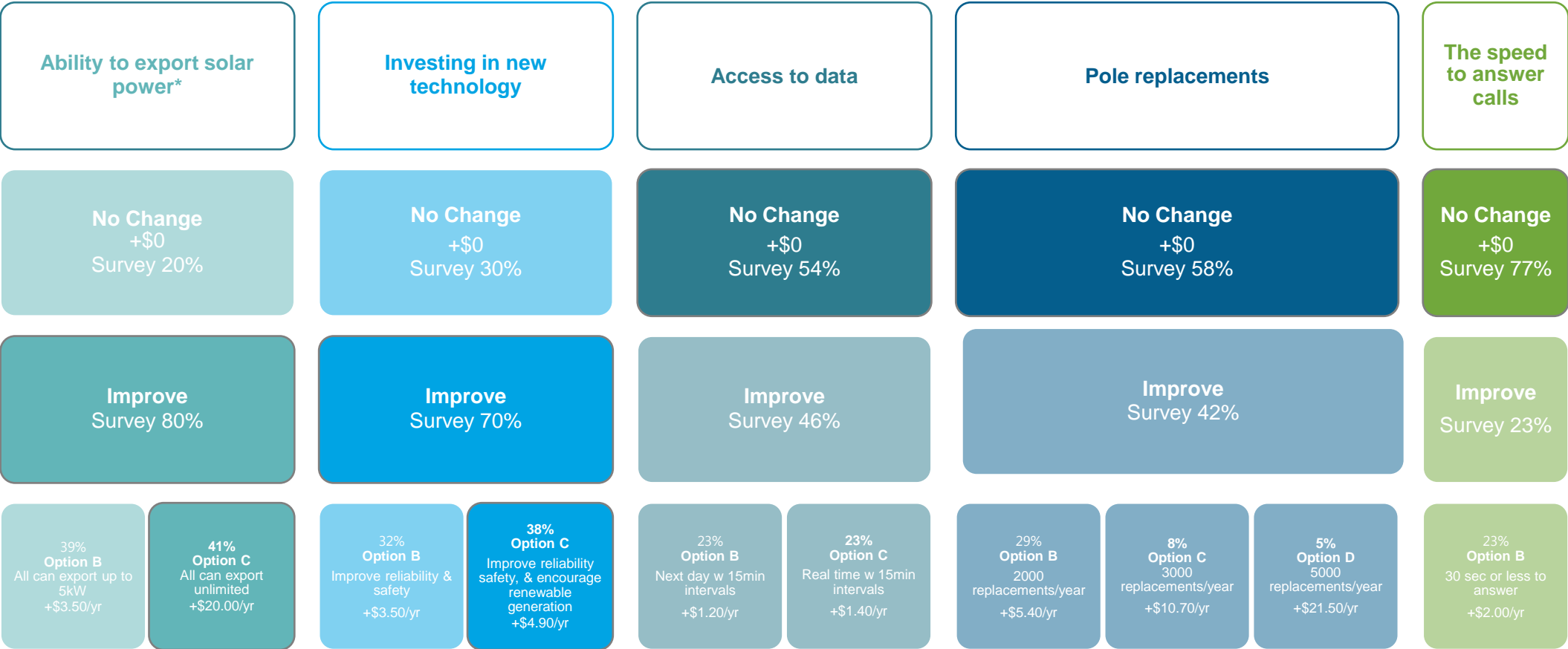
ALTERATIONS IN WILLINGNESS TO PAY FOR CHANGES

Option	Initial choice for NO CHANGE %	Final choice for NO CHANGE %
Ability to export excess solar power <small>Base: Respondents who think the cost should be spread across all customers (n=167)</small>	24	20
Investing in technology for reliability, safety & encourage renewable energy <small>Base: All respondents (n=601)</small>	32	30
Access to data <small>Base: All respondents (n=601)</small>	57	54
Pole replacements per year <small>Base: All respondents (n=601)</small>	59	58
The speed to answer calls <small>Base: All respondents (n=601)</small>	80	77

- After seeing the final impact on their bill, customers were slightly more willing to pay for improvements across all aspects mentioned.

Now we want to confirm the overall package of options you'd prefer in [the distributor's] proposals for 2021-26. In the next question, we will show you the overall impact on your bill from your chosen options (answers given to previous questions). You will be able to change your choices if you wish.
Base: All respondents (n=601)

SUMMARY OF PREFERENCES



* Note that only a sub-set of the sample were asked this question (those who believed that all customers should pay). However, the majority believed that solar customers should pay rather than all customers.

TOTAL AMOUNTS WILLING TO PAY FOR CHANGES

Option	Total (n=601) %	Male (n=299) %	Female (n=302) %	18-34 Years Old (n=237) %	35-54 Years Old (n=203) %	55+ Years Old (n=161) %	Low Usage (n=183) %	Medium Usage (n=271) %	High Usage (n=147) %
\$0 → not willing to pay for any changes	21	19	23	18	20	27	18	28	13
\$0.01 – \$5.00	20	18	21	18	22	18	22	18	20
\$5.01 – \$10.00	20	21	19	20	19	22	20	22	16
\$10.01 – \$15.00	19	21	18	25	17	14	19	14	30
\$15.01 – \$20.00	5	5	5	7	5	3	7	4	6
\$20.01 – \$25.00	4	5	3	4	4	4	3	5	5
\$25.01 – \$30.00	4	4	5	4	4	5	5	4	6
\$30.01 or more	6	8	4	4	8	8	7	6	6
Average	\$9.80	\$10.71	\$8.89	\$9.70	\$10.04	\$9.64	\$10.06	\$8.73	\$11.45

- 1 in 5 respondents were not willing to pay for any changes at all (21%).
- Nearly 60% of respondents were happy to pay up to \$15.00 extra in their annual bills for changes.
- Males and high usage respondents were slightly more willing to pay more

Now we want to confirm the overall package of options you'd prefer in [the distributor's] proposals for 2021-26. In looking at the options that [the distributor] is considering for 2021 to 2026, you should assume that your annual bill would go down by \$25 if there are no changes made at all. This is due to expected cost savings in the general plan before consideration of all these proposals in this survey. In the next question, we will show you the overall impact on your bill from your chosen options (answers given to previous questions). You will be able to change your choices if you wish.

Base: All respondents (n=601)

DEMOGRAPHICS



DEMOGRAPHICS

	All respondents %
Age	
18-24	8
25-34	31
35-44	22
45-54	12
55-64	13
65 or over	14
Gender	
Male	50
Female	50

	All respondents %
Speaks a language other than English	
Yes	28
No, just English	72
Aboriginal or Torres Strait Islander	
Yes	3
No	97
Prefer not to say	1
Household income	
Under \$20,000	5
\$20,000-\$59,999	20
\$60,000-\$99,999	23
\$100,000-\$149,999	23
\$150,000 plus	17
Prefer not to answer	11

Q2. Which of the following age groups best describes you...
Q6. Record gender.
Q7. Do you speak a language other than English at home/with family?
Q8. Are you of Aboriginal or Torres Strait Islander origin?
Q39. Which of the following categories best describes the income before tax of the highest earner in your household?
Base: All respondents (n=601)

DEMOGRAPHICS

	All respondents %
Residency	
Tenant	41
Home owner	59
Housing	
Stand-alone house or dwelling	27
Townhouse or semi	18
Apartment or unit complex	55
Usage	
Low (under 1000)	31
Medium (1000 - 1500)	45
High (1500+)	24

	All respondents %
Household makeup	
Single household	30
Couple living together with no children	32
Shared household	12
Family household with children still at home	27
Vulnerability	
Had to borrow money to pay a bill	5
Had to ask for an extension or paid late	8
Been on a special payment plan	7
Been disconnected due to inability to pay	2
None	83

Q37. Thinking about the home you currently live in, are you a...

Q38. Do you live in a...

Q40. Which of the following best describes your household make up?

Q36. In the last 12 months, have you had any difficulty paying your electricity bills such as...

Base: All respondents (n=601)

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Residential Survey | Phase 4

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