



Residential Survey | Phase 4

Powercor

September 2019



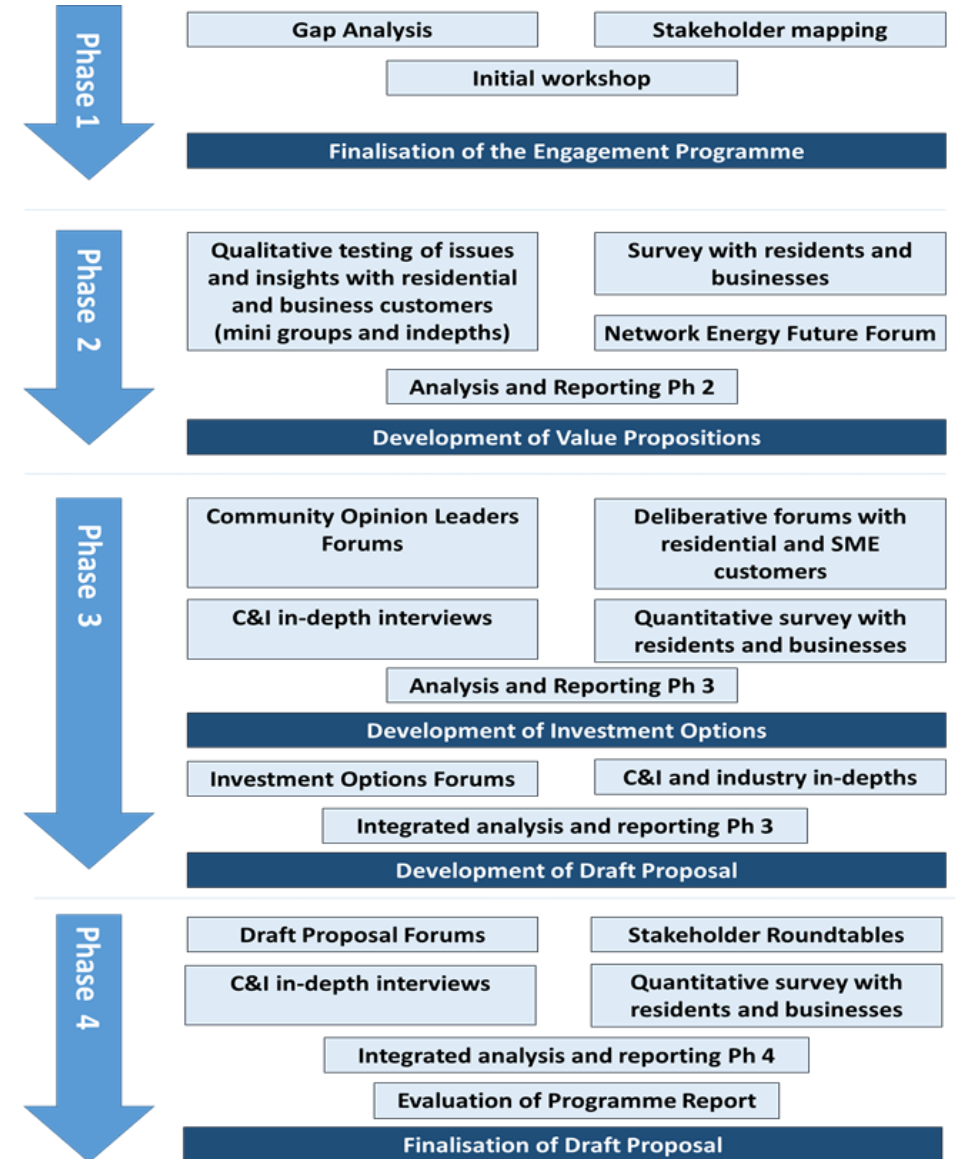
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APPROACH

BACKGROUND AND CONTEXT

- Powercor is required to provide a regulatory proposal to the AER every five years, detailing its predicted expenditure and revenue requirements over the regulatory period.
- Powercor is currently developing its regulatory proposal to the AER for the 2021-2026 regulatory period.
- To help shape this regulatory proposal, Powercor 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 research and engagement forums 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 Plan.



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=600 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 Powercor 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.
- CALD 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 (75%), with many confusing their retailer and distributor.
- When prompted, nearly three-quarters of respondents are aware that the distributor responds to electricity outages, maintains poles and wires and gets electricity to their homes. Powercor respondents are aware of most distributor roles (only 12% unaware).
- Reliability of supply and maintaining affordability continue to be the two most important values.

Improving customer service

- While most had not contacted their electricity distributor via phone (73%), they think that no change is needed to the speed of answering calls (82%).
- 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 (6% or less dissatisfaction for time and quantity of information).
- Continuing to remotely read smart meters is perceived to be important (64%).

KEY FINDINGS

Access to real time data

- There is interest, especially amongst higher usage households, in using real time data to:
 - Monitor and adapt behaviours (50%);
 - Checking the bill against their usage (40%); and,
 - Understand which appliances are using the most power (39%).
- Although only 22% state that they wouldn't use it at all, only 38% are willing to pay extra for more timely data, especially high users (55%) and younger (50%) customers.

Solar enablement

- Less than half of respondents with solar installed report that they still would have done so if they could not export (44%).
- Only around a quarter of respondents who do not currently have solar say they would install solar if they could not export (27%).
- Saving money (88%) and environmental outcomes (50%) 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 (29%) or unlimited (35%).

KEY FINDINGS

Digital and resilient network

- 60% of respondents indicate that they want Powercor to invest in technology to improve reliability and safety, with almost a third also wanting to encourage renewable energy generation (31%).
- Most are happy with the 1000 pole replacements a year (62%), although almost two in five respondents (38%) are willing to pay more to increase the number to 2000+.
- Two-thirds of respondents indicate they want to see more undergrounding of poles, completed at least by 2030.
- There is a willingness to pay to improve reliability in areas where REFCLs operate (65%), with the majority of these (44%) willing to pay for no customers having outages.
- The majority of respondents (61%) are willing to pay \$0/55/year to help improve reliability in worst served areas.

Affordable network

- More than half of respondents (52%) indicate they are willing to change their usage times if they can save money.
- It is felt that 'time of use' pricing should be an 'opt in' system (50%), rather than opt out (24%).
- Over half of respondents (55%) are interested in shifting their usage if they receive a monetary incentive with a further 10% 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 undergrounding poles (66%), improving unnecessary outages from REFCLs (65%), improving reliability in worst served areas (61%) and investing in technology to improve reliability and safety (60%).
- Overall, 16% of respondents are *not* willing to pay for any changes, with 63% of respondents willing to pay up to \$15.00 extra/year for improvements.
- On average, Powercor respondents are willing to pay \$9.86 additional on their annual bill.

KEY FINDINGS

Overall preferences

Undergrounding poles		Improving unnecessary outages from REFCLs		Ability to export solar power*		Improving reliability in worst served areas		Investing in new technology		Access to data		Pole replacements		The speed to answer calls															
No Change +\$0 Survey 34%		No Change +\$0 Survey 35%		No Change +\$0 Survey 36%		No Change +\$0 Survey 39%		No Change +\$0 Survey 40%		No Change +\$0 Survey 57%		No Change +\$0 Survey 62%		No Change +\$0 Survey 82%															
Improve Survey 66%		Improve Survey 65%		Improve Survey 64%		Improve Survey 61%		Improve Survey 60%		Improve Survey 43%		Improve Survey 38%		Improve Survey 18%															
43% Option B Underground in bushfire areas ending 2030 +\$2.60/yr		23% Option C Underground in bushfire areas ending 2025 +\$5.10/yr		21% Option B Approx 500 customers experience outages +\$0.30/yr		44% Option C No customers experience outages +\$0.60/yr		29% Option B All can export up to 5kW +\$3.50/yr		35% Option C All can export unlimited +\$20.00/yr		61% Option B Invest to improve +\$0.55/yr		29% Option B Improve reliability & safety +\$3.50/yr		31% Option C Improve reliability safety, & encourage renewable generation +\$4.90/yr		15% Option B Next day w 15min intervals +\$1.20/yr		23% Option C Real time w 15min intervals +\$1.40/yr		23% Option B 2000 replacements/year +\$5.40/yr		11% Option C 3000 replacements/year +\$10.70/yr		10% Option D 5000 replacements/year +\$21.50/yr		20% 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=600) %	18-34 Yr olds (n=120) %	35-54 Yr olds (n=200) %	55+ Yr olds (n=280) %	Total 2018 (n=605) %
Powercor	25	23	21	28	27
Origin	12	9	11	13	15
Energy Australia	7	4	10	7	8
AGL	11	15	12	9	7
Red Energy	6	6	4	8	7
Simply Energy	5	8	4	4	5
Lumo	2	4	2	2	5
Alinta	2	3	2	3	2
Ausnet	1	2	1	1	1
Dodo	2	2	1	2	1
Powershop	0	0	0	0	1
Momentum Energy	1	2	1	1	2
None/off grid	1	0	0	1	1
Don't Know	15	17	20	10	15

- Around a quarter of respondents were aware that Powercor was their distributor (similar to last year).
- Respondents from non English speaking backgrounds were significantly less likely to be aware of Powercor as their distributor (6%).

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=600)

AWARENESS OF ROLES OF DISTRIBUTOR

Perceived roles	Total 2019 (n=600) %	18-34 Yr olds (n=120) %	35-54 Yr olds (n=200) %	55+ Yr olds (n=280) %	Total 2018 (n=605) %
Responding to electricity outages and interruptions	73	56	68	83	73
Maintaining electricity poles and wires	72	53	66	84	73
Getting electricity to your home	72	65	67	79	70
Connecting electricity to new homes	64	55	58	72	60
Long term planning to ensure a resilient electricity supply	49	26	43	62	45
Trimming vegetation around powerlines	51	33	39	68	49
Maintaining and operating street lighting	50	35	48	57	48
None of the above	12	15	14	10	-

- Respondents aged 55 years or older were significantly more likely to be aware of the roles of the distributor.
- Those aged 18-34 years, from CALD or vulnerable households were significantly less likely to be aware across the board.

Q10. [insert distributor] is the electricity distributor for your area. Which of the following roles were you aware that [insert distributor] did before today?
Base: All respondents (n=600)

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	52	60	72	28
Maintaining affordability	23	32	23	18	22
Committed to providing a safe environment for customers and workers	5	4	7	4	12
Use electricity when you want or receive savings for reducing use	2	4	2	1	10
Committed to providing a safe network that mitigates bushfire risks	1	1	0	2	9
Keeping your data and our network secure	2	1	2	2	6
Making it easier for you to export solar and charge your battery	1	1	2	1	5
Making it easier for you to connect	2	3	3	1	5
Making it easier for you to use your data to make informed choices	0	0	0	0	2

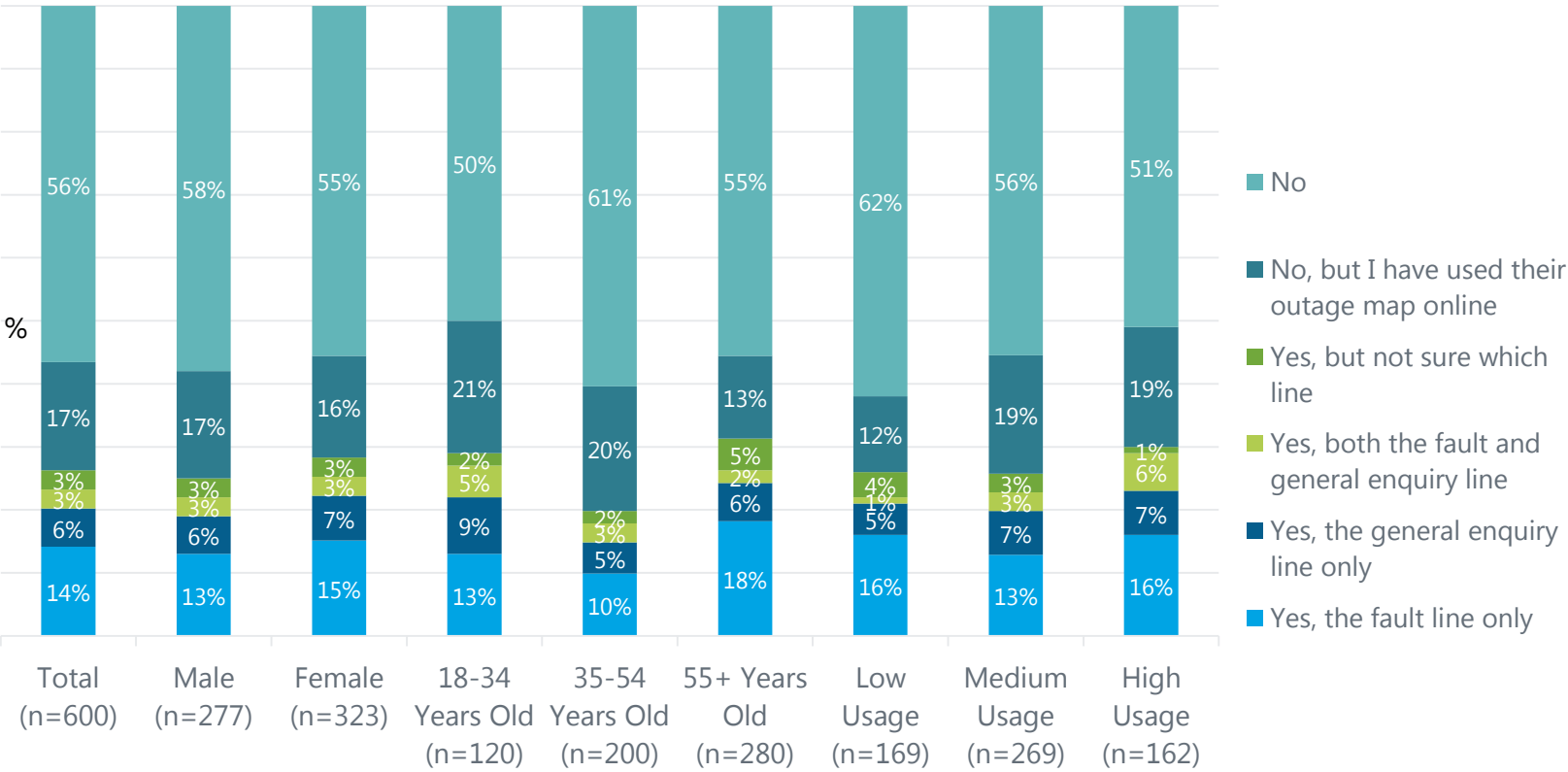
Q11. As an electricity distributor, [insert distributor] ensures the safe and reliable supply of electricity, by maintaining poles and wires. [Insert distributor] is not an electricity retailer – they transport electricity to your home while retailers sell you the electricity. From the list below, please 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=600)
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.

- Providing a reliable supply of electricity was the benefit most commonly ranked 1st, with around two thirds selecting this (64%).
- This was significantly higher for those aged 55 years and over (72%).
- Those aged 18-34 years were significantly more likely to select maintaining affordability as a 1st preference (32%).

IMPROVING CUSTOMER SERVICE

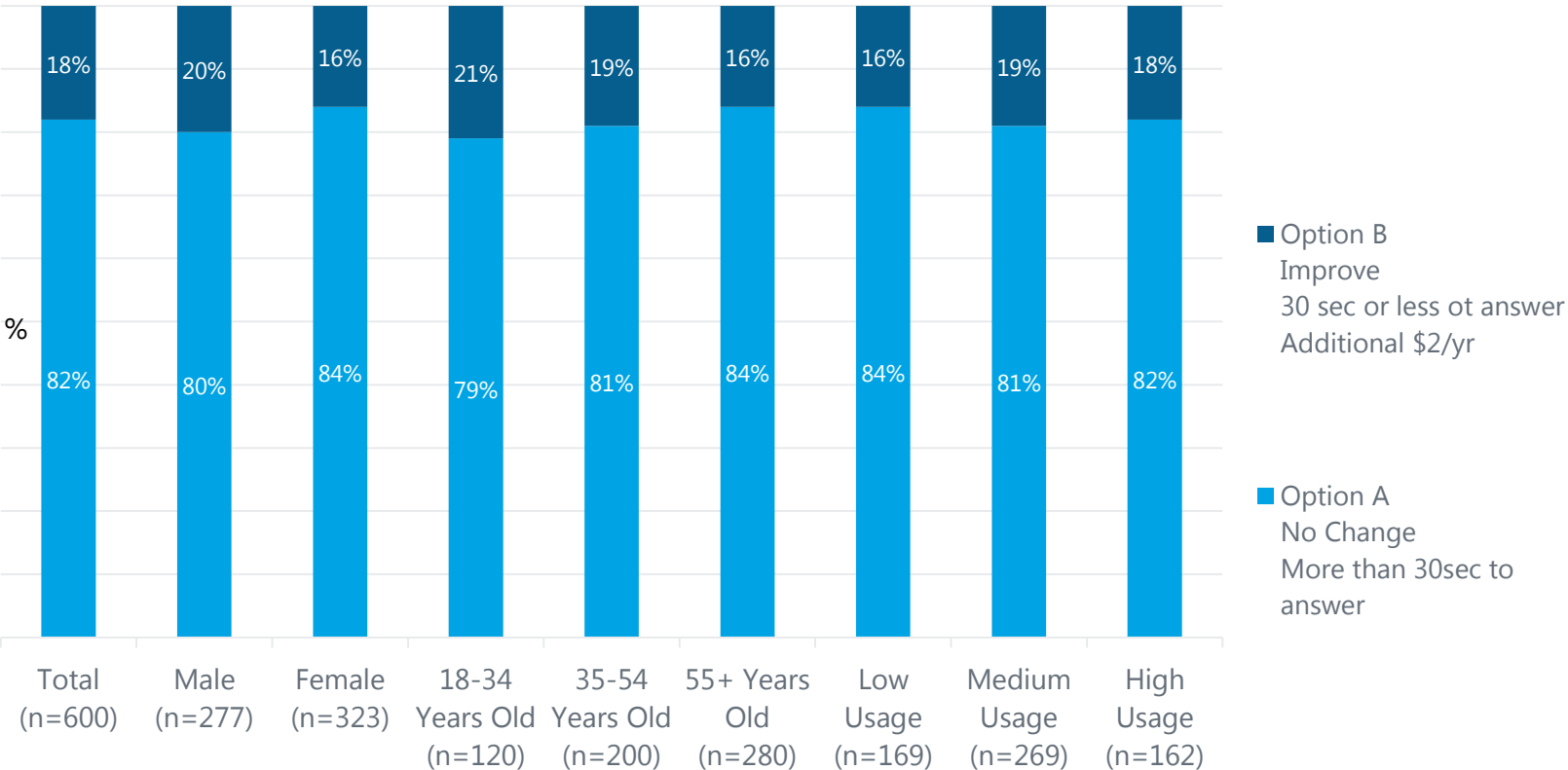


INCIDENCE OF CONTACTING DISTRIBUTOR



- The majority of respondents have not contacted Powercor at all (56%) or to only have used the outage map online (17%).
- 26% had used either the fault or enquiry line or both.
- This was consistent across demographics.

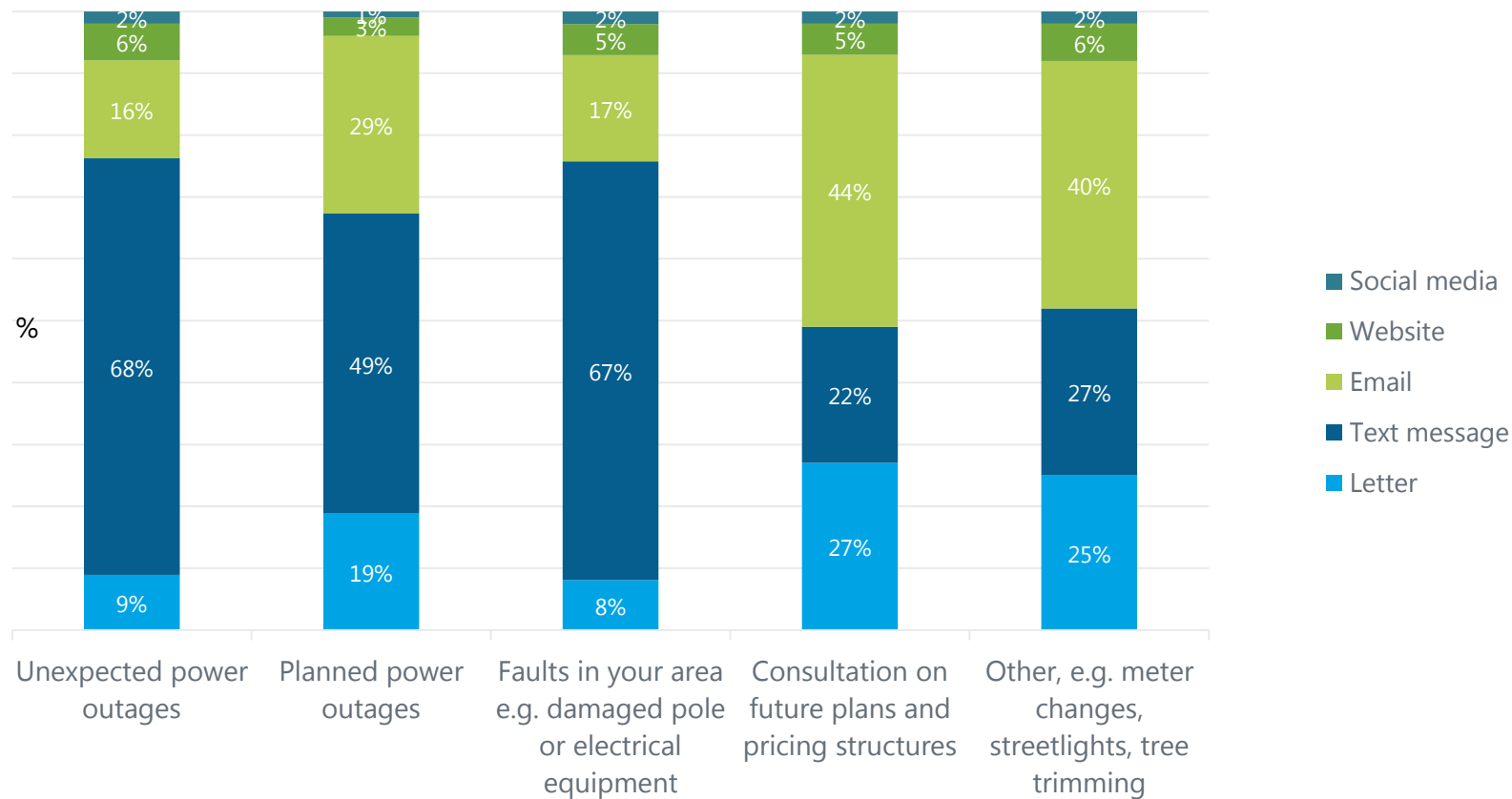
IMPROVING SPEED OF ANSWERING CALLS



- More than four in five respondents were happy with no change to call answer times (82%).
- There were no differences by demographic groups or by whether or not they had previously called Powercor.

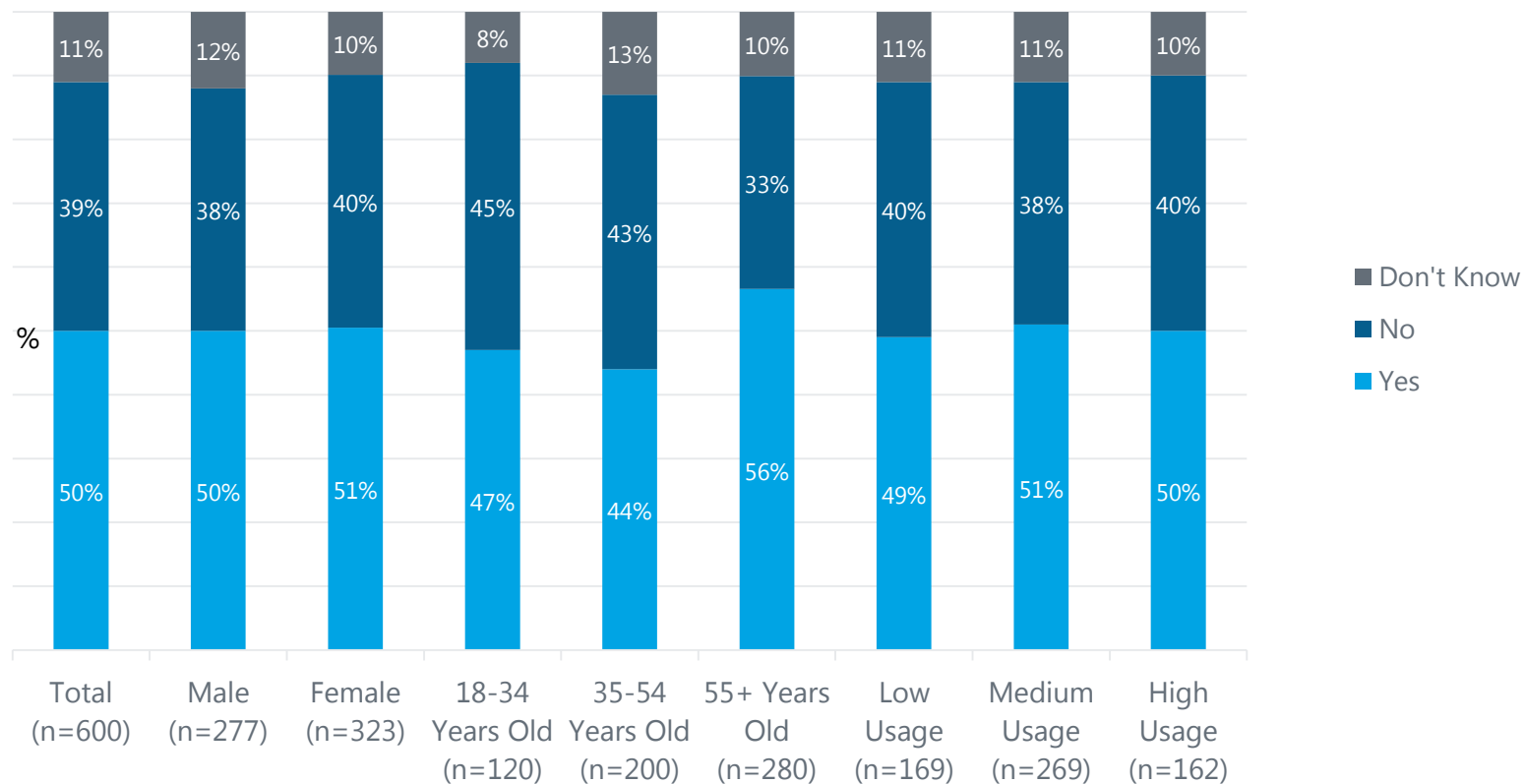
Q14a. Customer service is very important to [the distributor's name]. [Distributor] currently provides two manned call lines: a fault line and a general enquiry line. [Distributor] aims to answer calls to **the electricity fault line** within 30 seconds, while there is currently no standard response 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=600)

PREFERRED METHOD OF COMMUNICATION



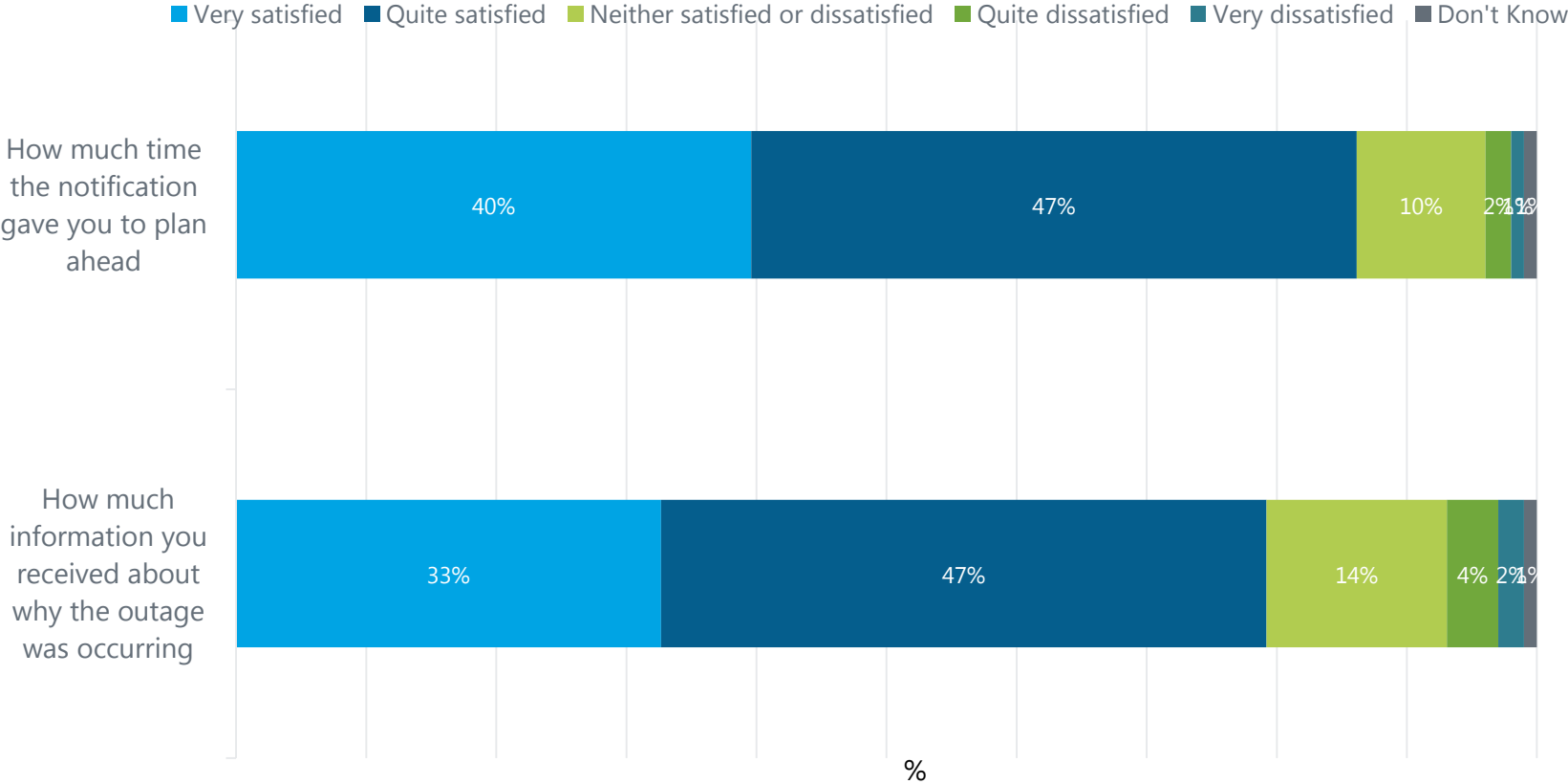
- Text message and email were the two preferred channels of communication depending on the topic.
- Texts were thought most appropriate for faults and power outages.

INCIDENCE OF NOTIFICATION OF A PLANNED OUTAGE



- Half of respondents recalled having notification of a planned outage.
- Those from a non-English speaking background were significantly less likely to recall such notification (20%).

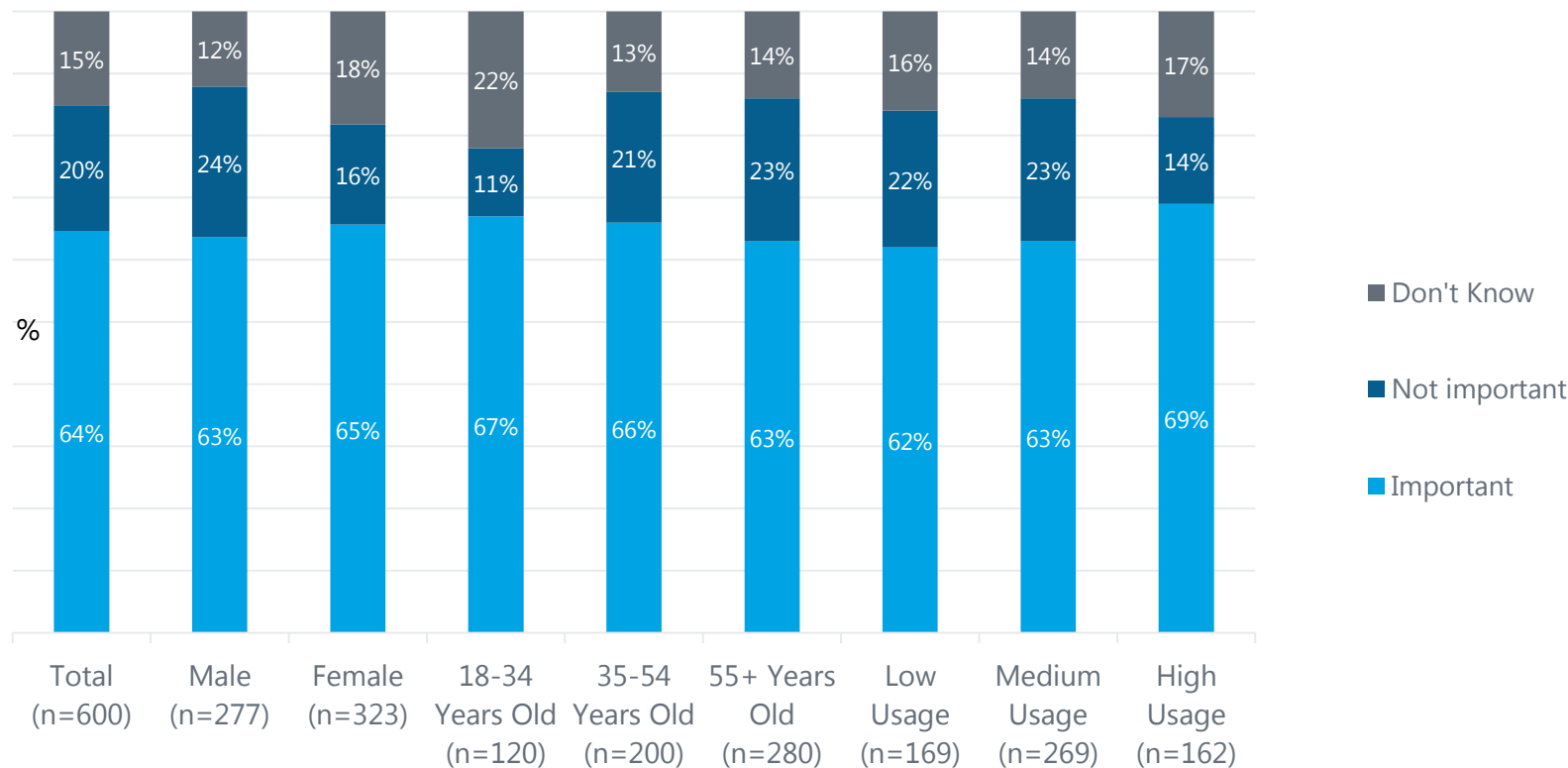
SATISFACTION WITH PLANNED OUTAGE COMMUNICATION



- 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=298)

PERCEIVED IMPORTANCE OF REMOTELY READING SMART METERS



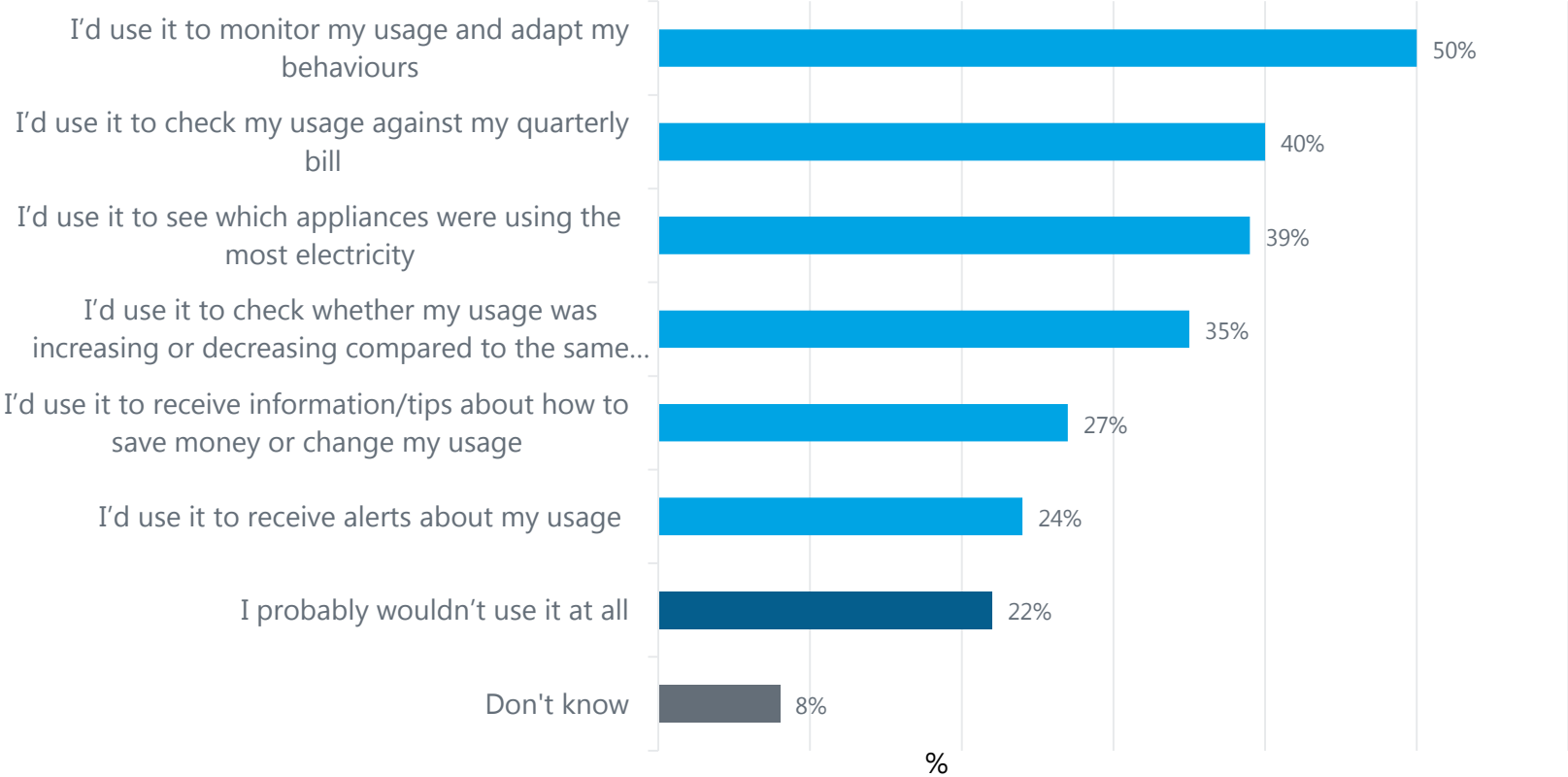
- Over two-thirds of respondents indicated that it was important to continue reading the meter remotely and to turn power on and off when moving.
- Respondents from a non-English speaking background were significantly more likely to find this important (82%).

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=600)

ACCESS TO REAL TIME DATA



INTEREST IN ACCESS TO USAGE DATA



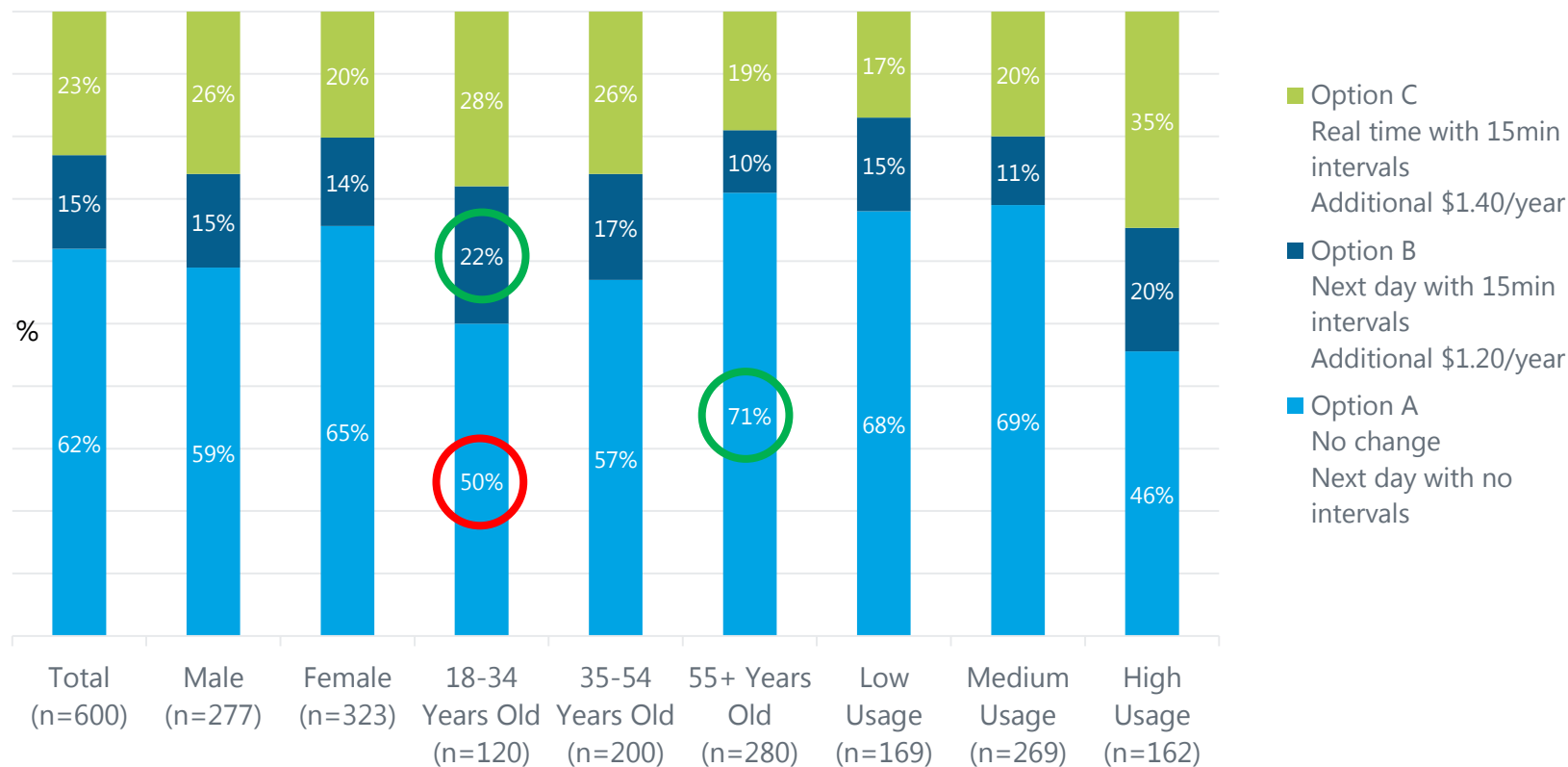
- At least half of respondents wanted to use data to monitor and adapt their behaviours, this was significantly higher amongst high usage households (61%).
- Those over 55 years and low usage households were significantly more likely to indicate they probably wouldn't use it at all (34% and 30% respectively).

[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=600)

PREFERENCE FOR ACCESS TO DATA



- The majority chose no change - Option A (62%)
- Those aged over 55 years were significantly more likely to choose no change than other ages.
- Some groups were more likely to choose a change - 18-34 year olds and vulnerable households were significantly more likely to choose option B (22 & 21% respectively).
- High usage households were significantly more likely to choose Option C (35%).

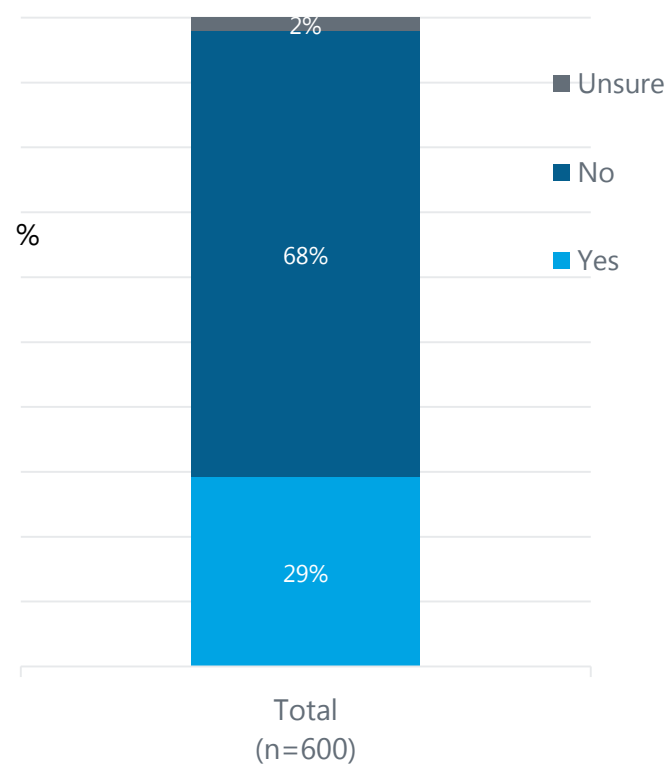
Q20a. In terms of providing the data on your usage, which option would you prefer? *Answers provided after seeing full bill impact.*
Base: All respondents (n=600)

SOLAR ENABLEMENT

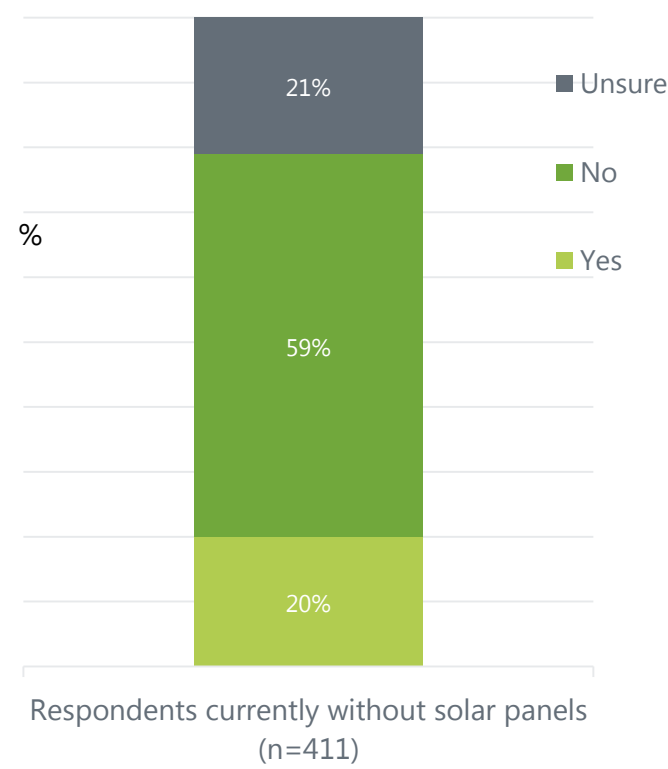


INCIDENCE OF & INTENTION TO GET SOLAR PANELS

Incidence of Solar Panels



Intention to install Solar Panels



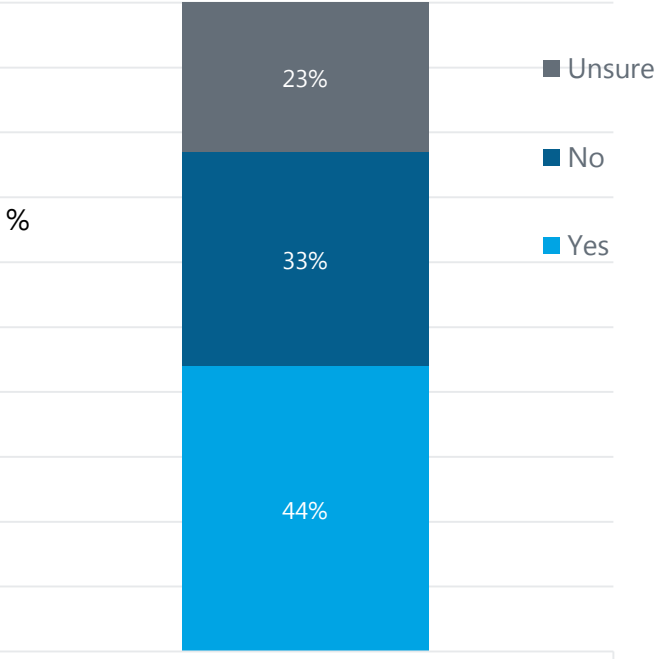
- Respondents over 55 years and low usage households were significantly more likely to indicate they had solar panels (37% and 41% respectively).
- Vulnerable customers were less likely to say they had solar panels (19%).
- 1 in 5 respondents without solar panels intended to install them in the next 5 years.

Q21. Do you have solar panels on the home you are living in?
Base: All respondents (n=600)

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=411)

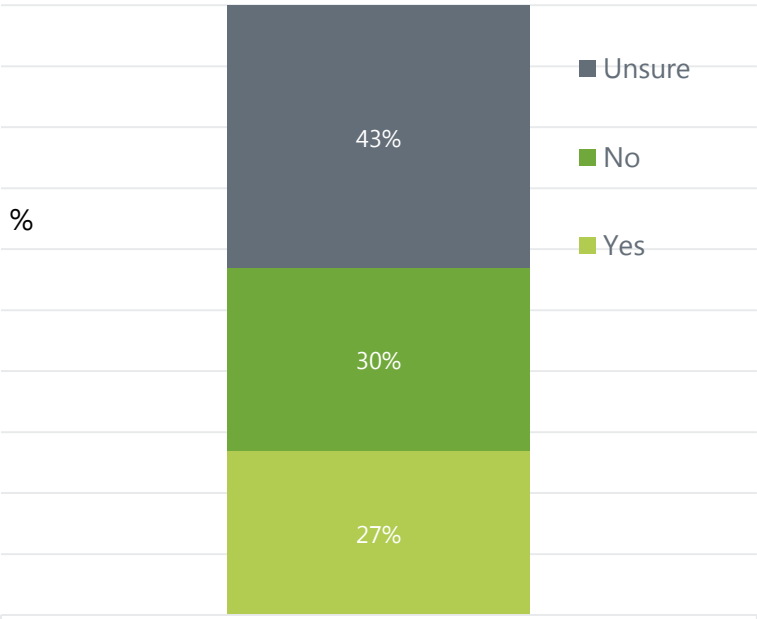
IMPACT OF EXPORTING SOLAR ELECTRICITY

Impact amongst those with Solar Panels



Respondents with solar panels on their home (n=176)

Consideration amongst those without Solar Panels



Respondents currently without solar panels but considering getting them (n=171)

- Less than half of respondents with solar installed reported that they still would have done so if they could not export (44%).
- Only around a quarter of respondents who do not currently have solar said they would install solar if they could not export (27%).

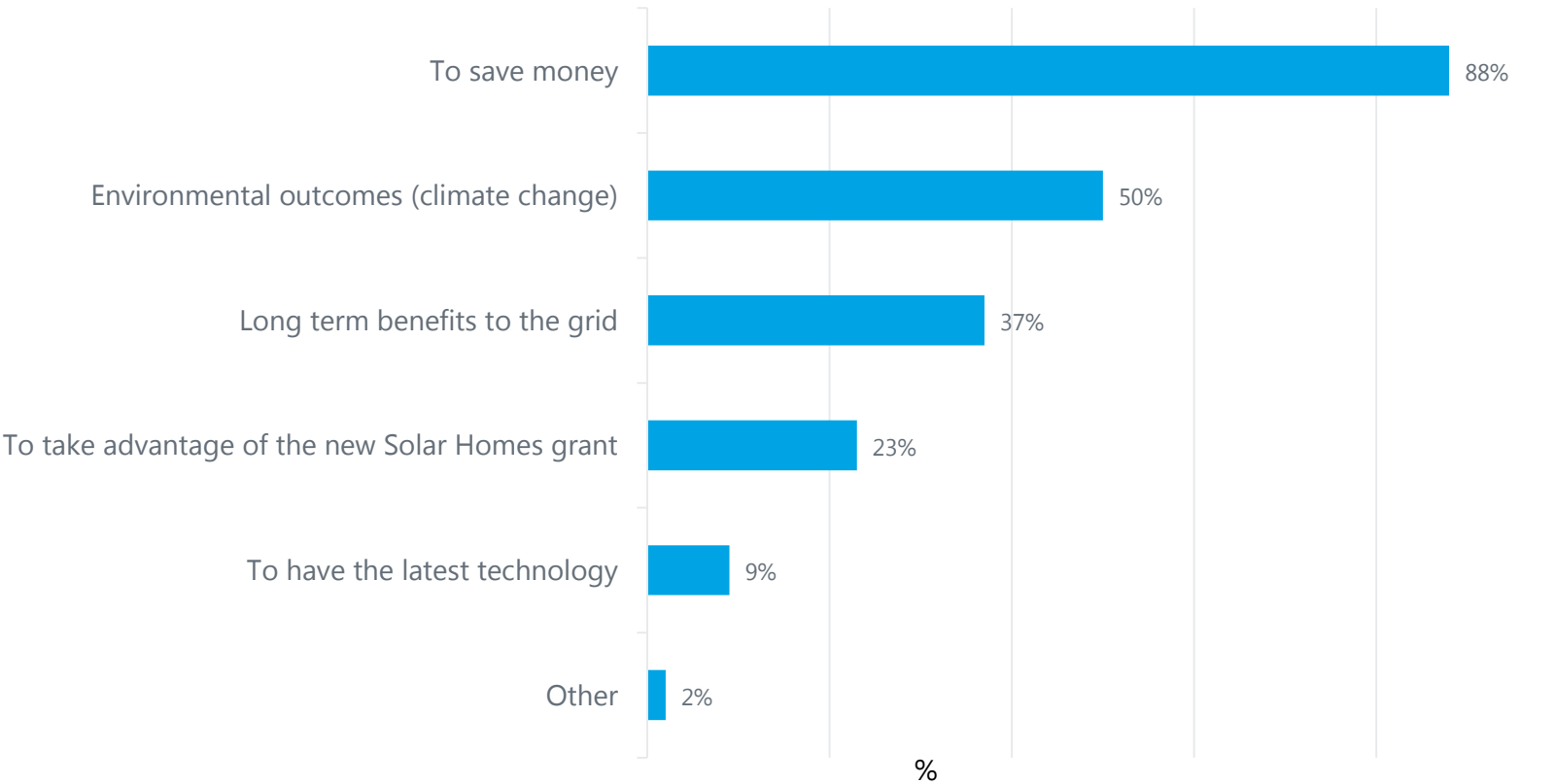
Q23. Would you have decided to install solar panels if you could not export excess solar at all? *If the property already had solar when you moved in then please answer as if you had decided to install it.*

Base: Respondents with solar panels installed on their home (n=176)

Q24. Would you install solar panels if you could **not** sell spare electricity from your solar on to the network??

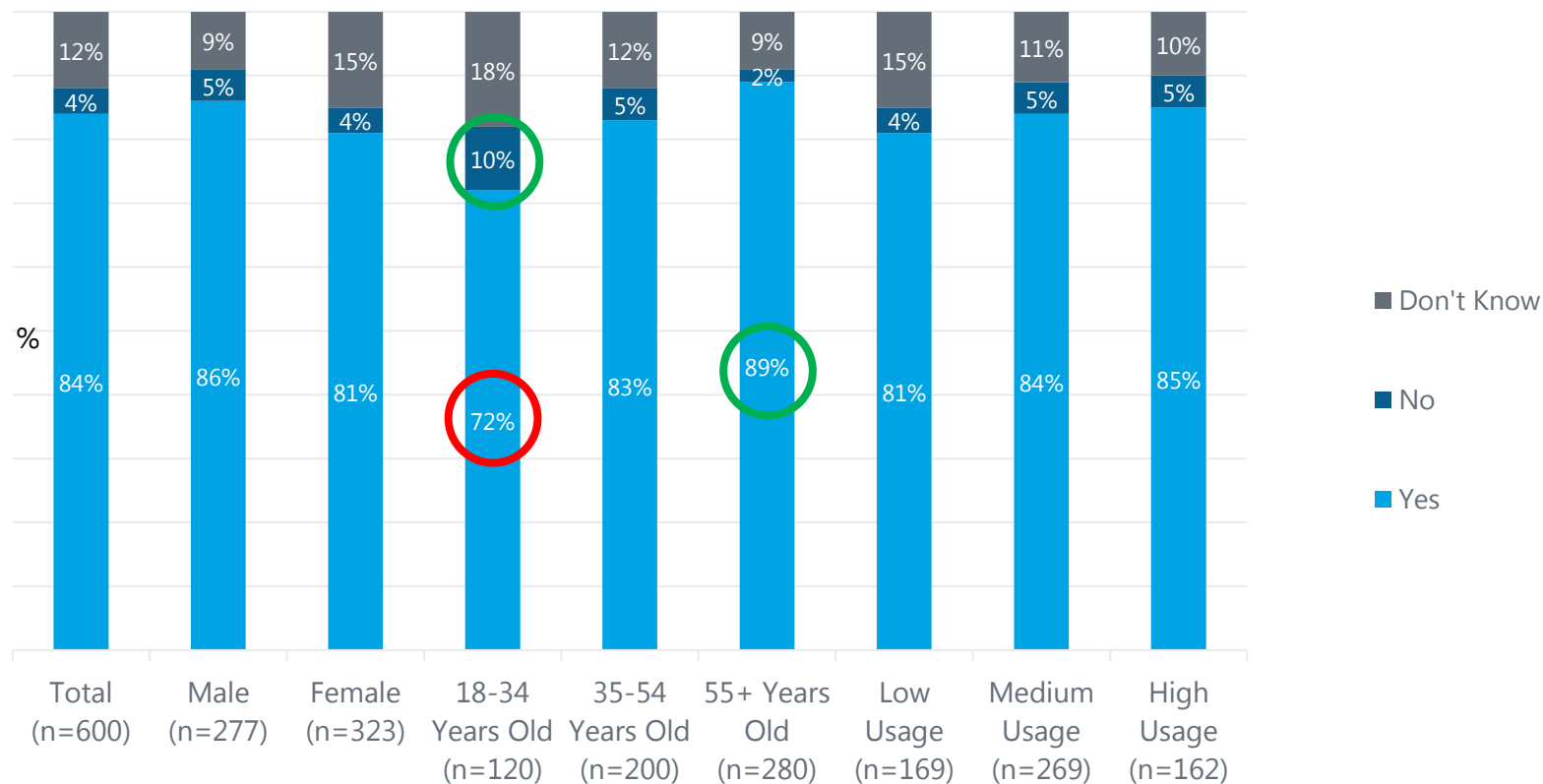
Base: Respondents considering installing solar panels (n=171)

KEY MOTIVATORS TO INSTALL SOLAR PANELS



- The majority of respondents with solar or intending to get it indicated that money saving was the biggest incentive.
- This was significantly lower for those aged 18-34 (77%).
- 18-34 year olds were significantly more likely to indicate they wanted the latest technology (20%).

ABILITY TO EXPORT BACK TO THE GRID



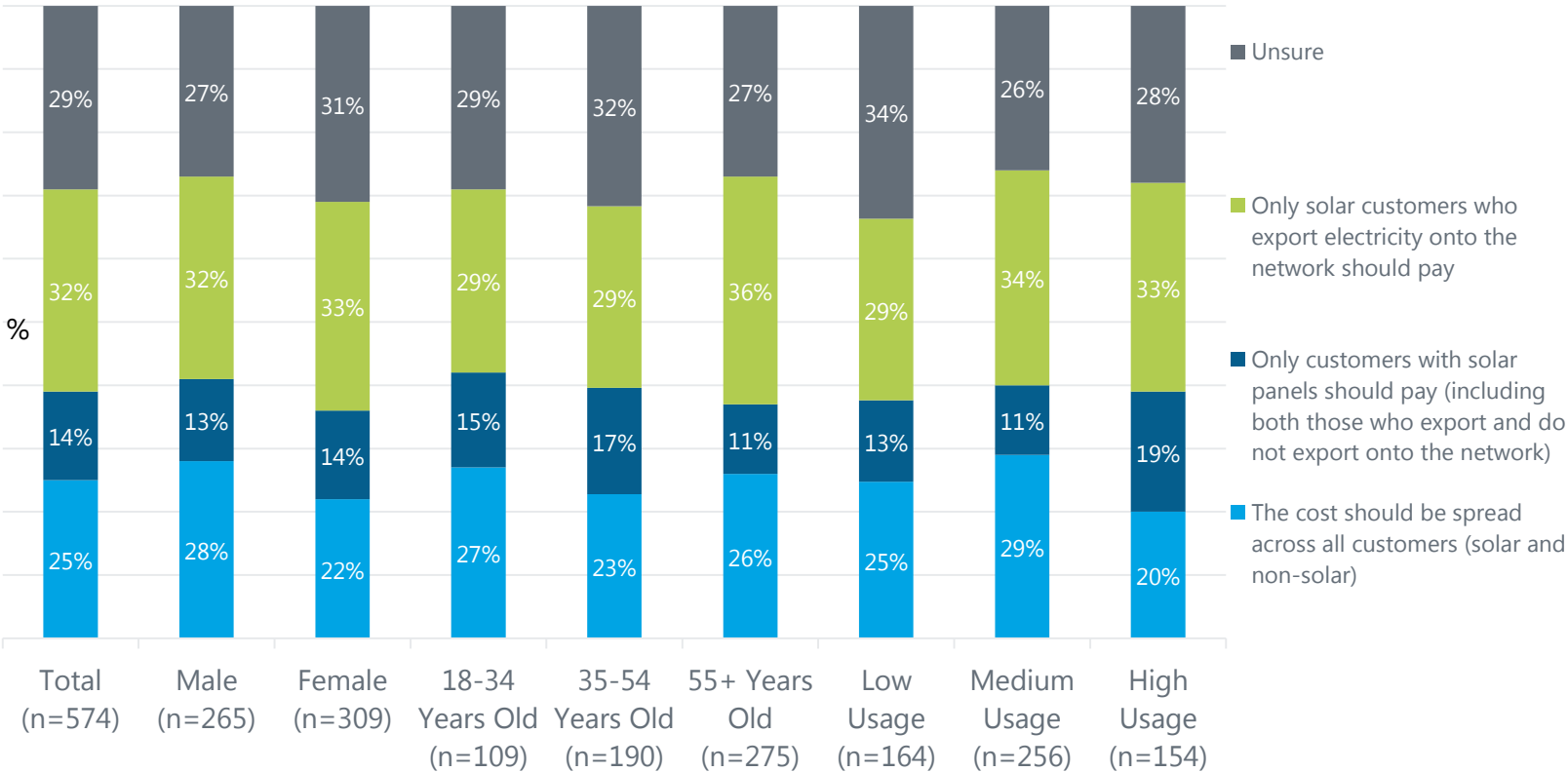
- More than 4 in 5 respondents indicated they thought that solar customers should be able to export back to the grid.
- This was significantly lower amongst 18-34 year olds (as shown) and vulnerable households (76%).

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?

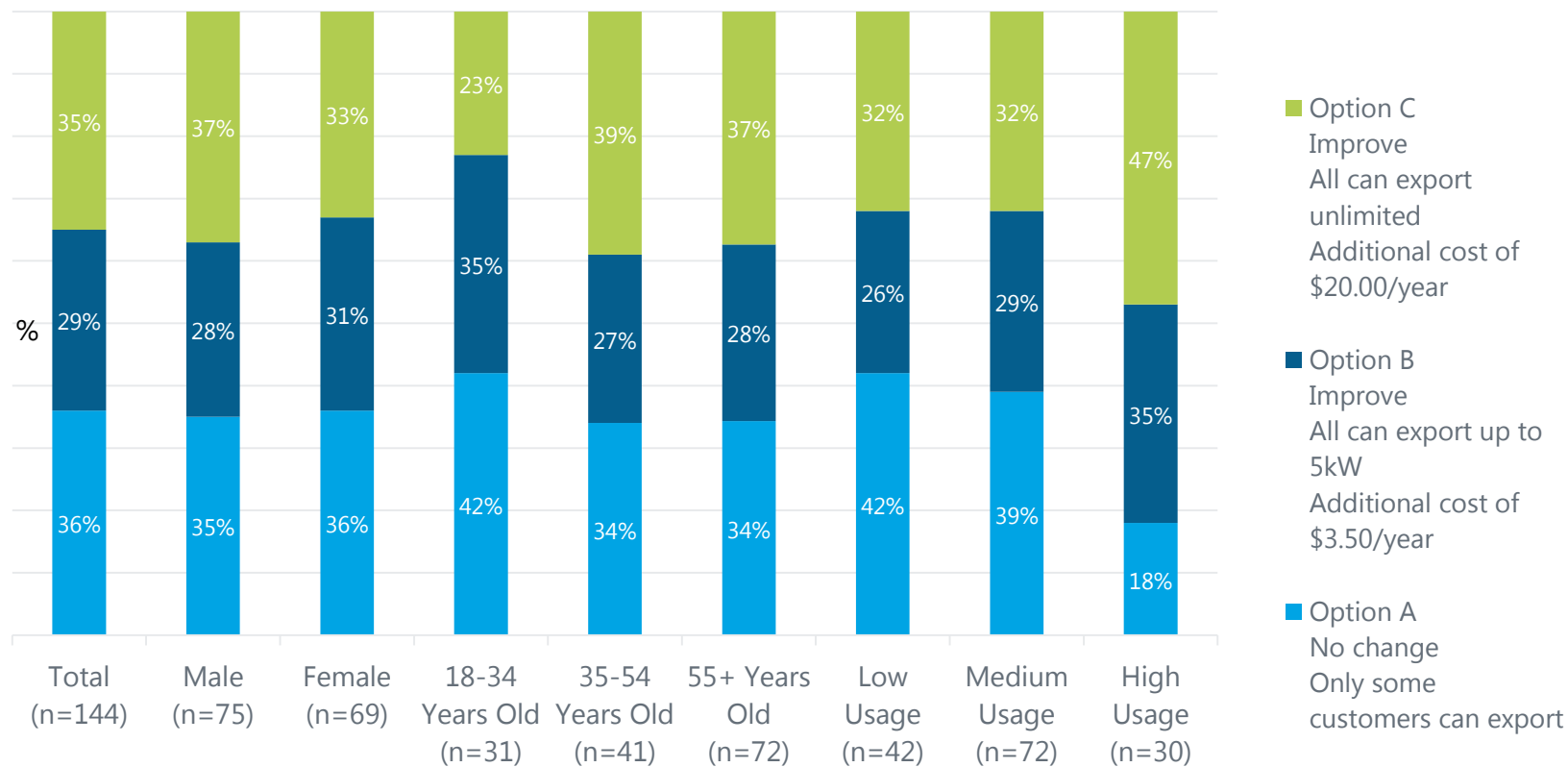
Base: All respondents (n=600)

COST FOR EXPORTING BACK TO THE GRID



- 46% believed that only solar customers should pay for the additional cost of ensuring people with solar panels are able to export with nearly a third suggesting only those exporting should pay for this.
- A quarter thought the cost should be spread across all customers (43% of those with solar).

PREFERENCE FOR EXPORTING SOLAR POWER

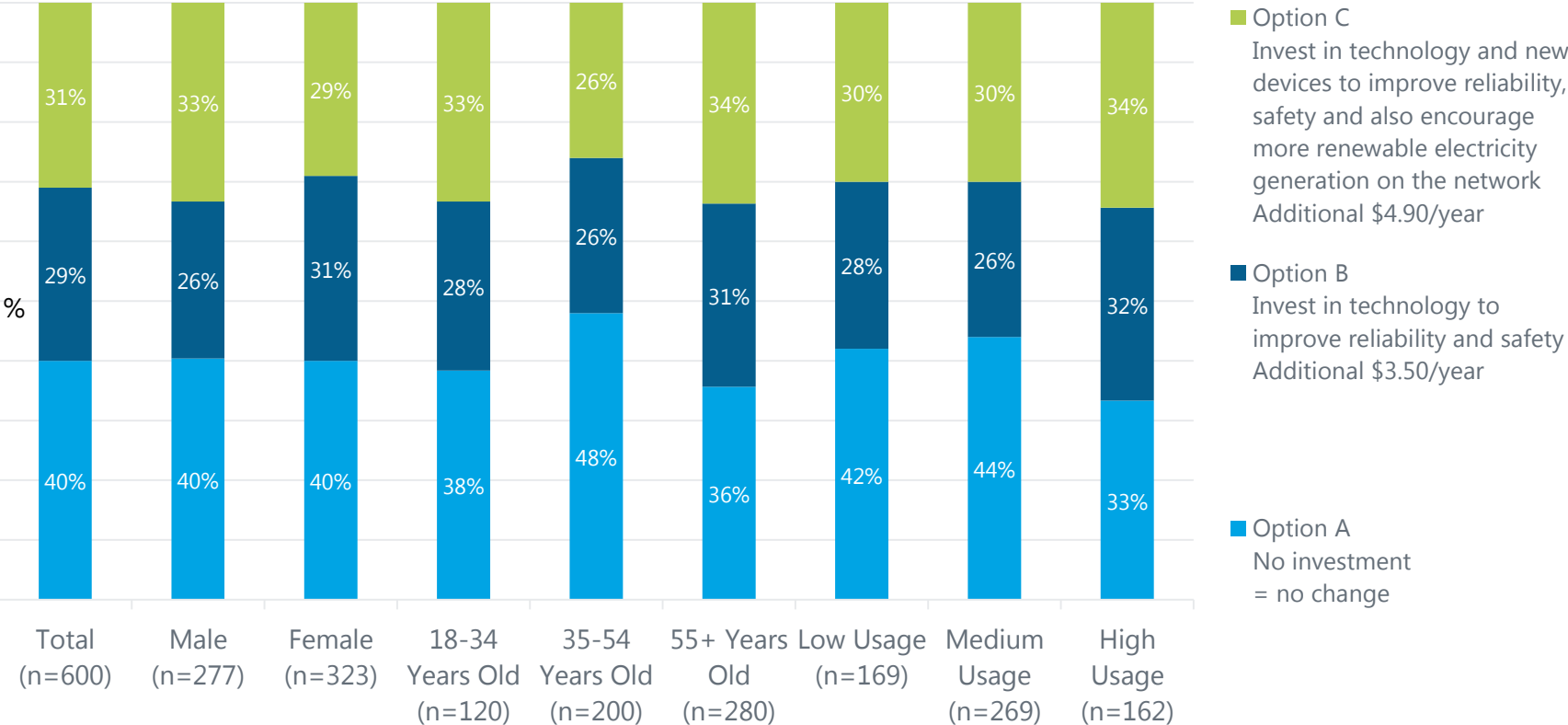


- Two thirds of those who thought the costs should be spread (64%) indicated a preference for improvement, which was quite evenly split between options B and C.

DIGITAL & RESILIENT NETWORK



PREFERENCE FOR INVESTING IN TECHNOLOGY



- 60% of respondents wanted to see improvements in the investment into technology, at least to improve reliability and safety.

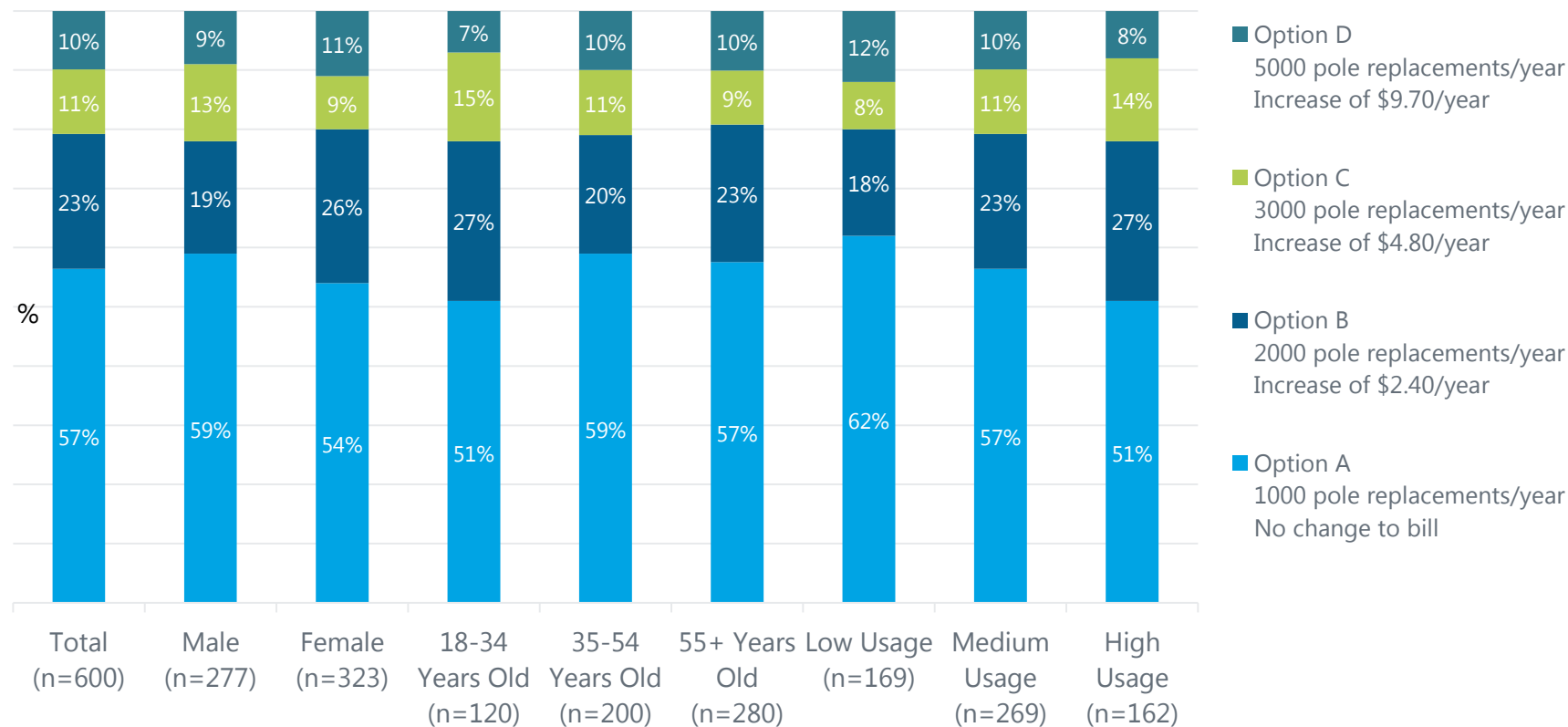
[the distributor] is looking at ways to use new technology to operate more efficiently and effectively. Although there would be a cost initially, in the longer term introducing this technology would reduce the costs of running the network and result in lower customer bills. The technology could be used 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=600)

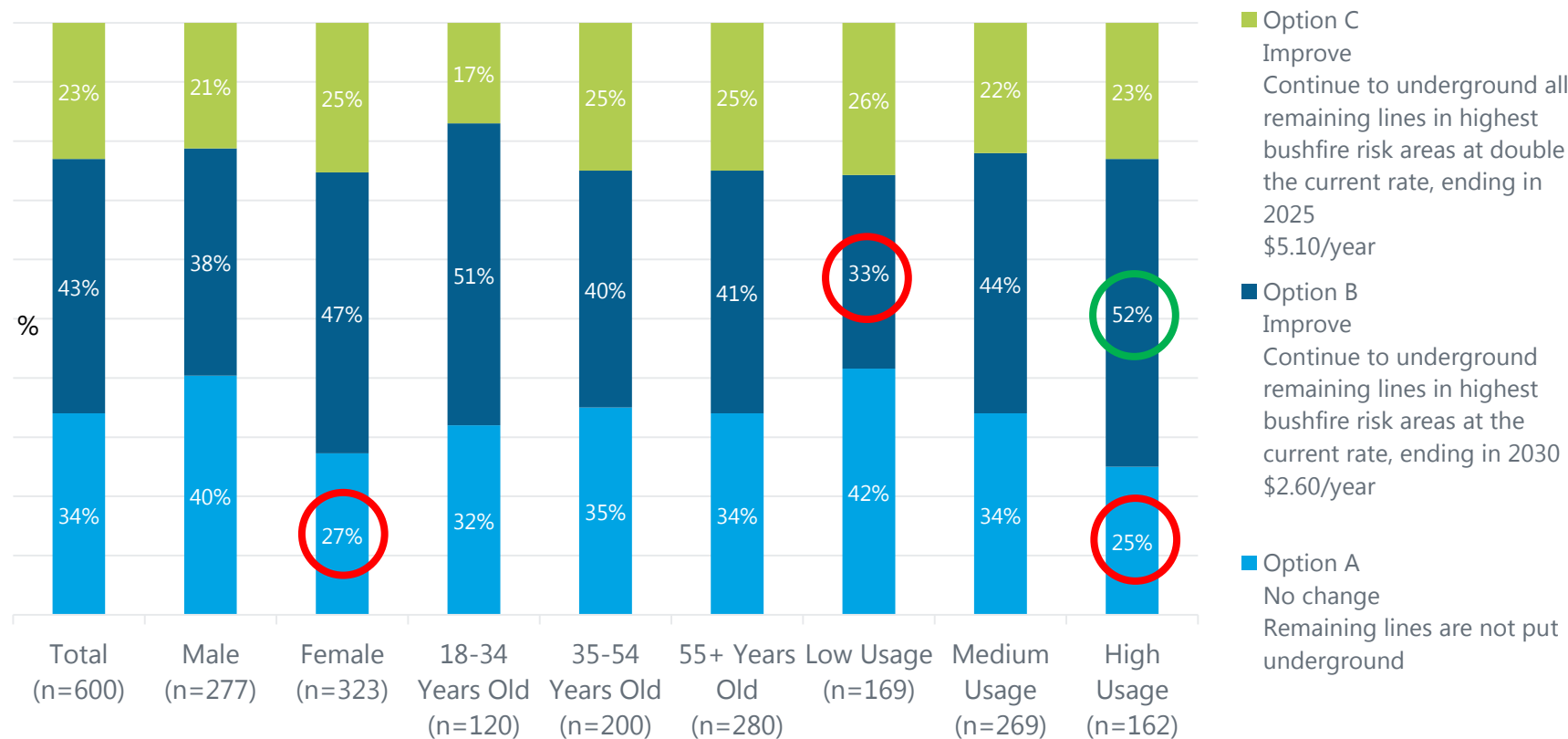
PREFERENCE FOR POLE REPLACEMENTS



- More than half of respondents wanted no change to pole repairs and replacements (57%).
- 43% wanted some improvement, at least to Option B level.
- There were no significant differences between groups.

Q30a In bushfire prone areas, faulty poles and broken wires can cause bushfires. If the older poles and wires are replaced with newer ones it reduces the risk of a bushfire being started through a fault. However, this results in higher costs to Powercor and higher electricity bills for customers. At the moment Powercor replaces 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=600)

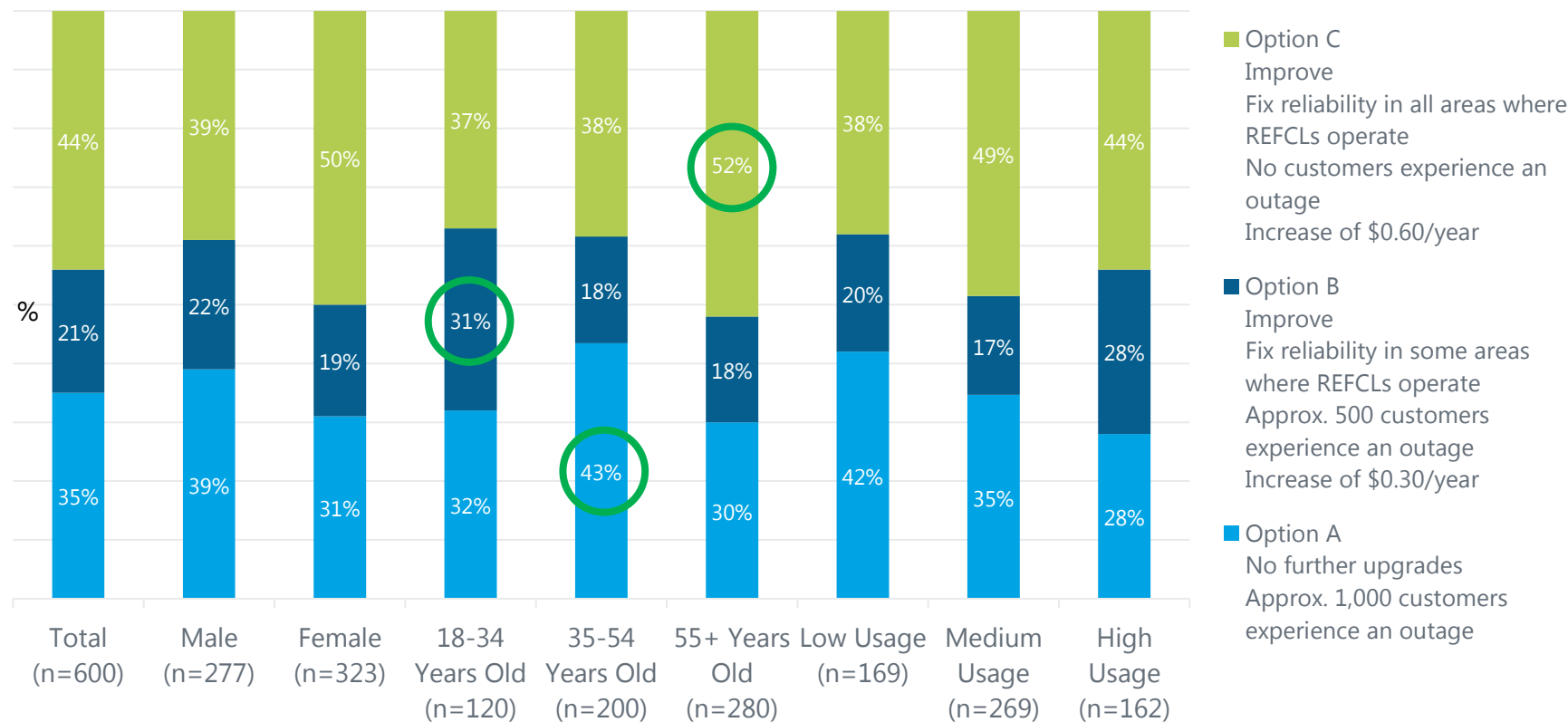
PREFERENCE FOR UNDERGROUNDING POLES



- Most wanted an remaining lines to be put underground.
- Just over 1 in 5 respondents indicated a preference for this being completed by 2030.
- This was significantly higher amongst high usage households.

Q31a. Undergrounding powerlines decrease the risk of bushfires. Powercor is considering undergrounding all remaining powerlines in the highest risk bushfire areas either by 2025 or 2030. (Note that 250km of lines are already underground but 450km of lines remain above ground). Which option would you prefer? *Answers provided after seeing full bill impact.*
Base: All respondents (n=600)

PREFERENCE FOR IMPROVING UNNECESSARY OUTAGES FROM REFCLs



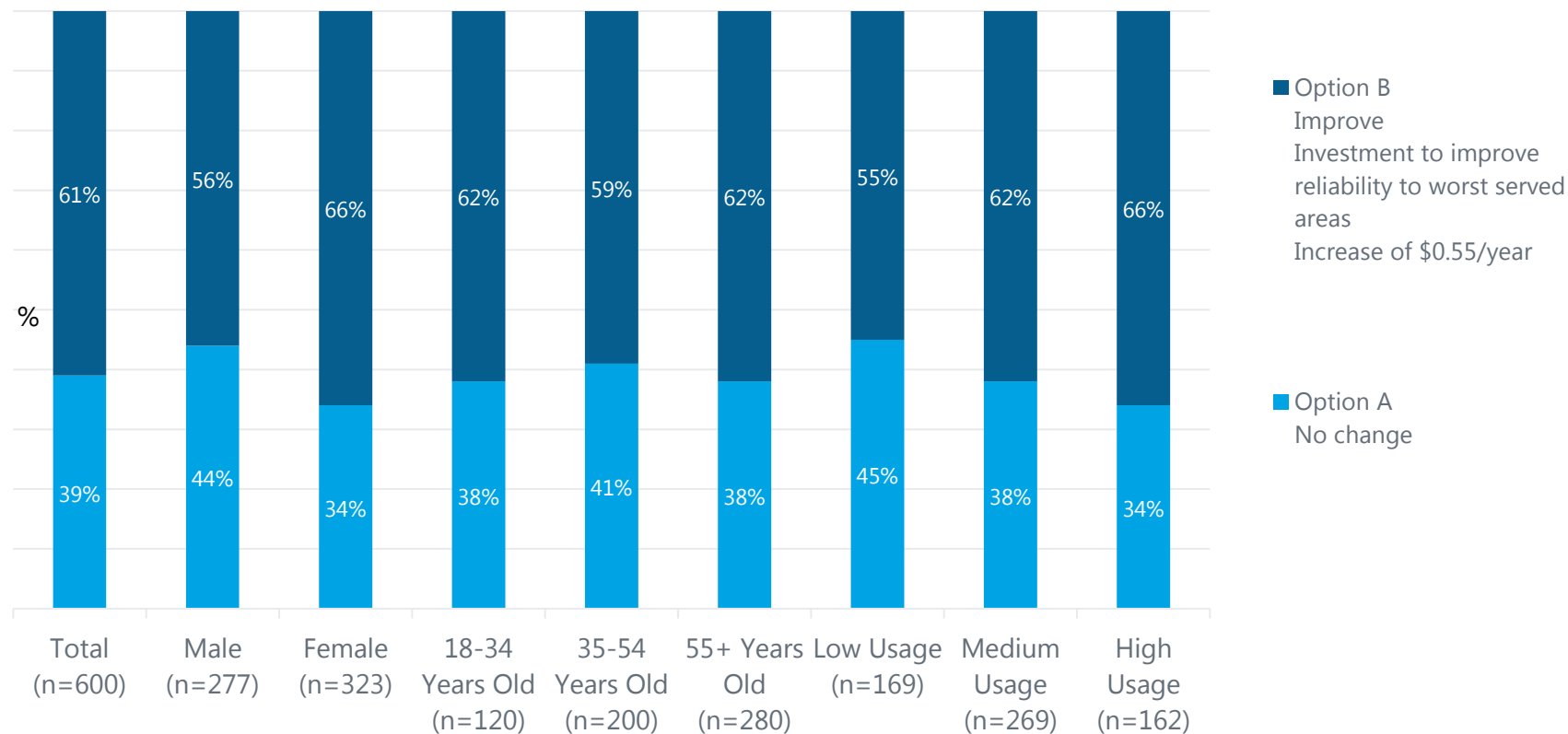
- Most respondents wanted some upgrades to fix reliability in REFCL areas – the most popular option being to pay 60c a year so no customers experience an outage.
- There were significant differences in preference across the age groups (as shown).

Q32a. Rapid Earth Fault Current Limiters (REFCLs) work like large safety switches on the network, reducing the risk of fires starting from powerline faults. They detect when one line out of a three-phase powerline has fallen to the ground and almost instantly reduce the voltage on the fallen line. At the same time, they boost the voltage on the two remaining lines in service. This means Powercor can maintain power to homes and businesses while substantially reducing the fire risk. Here is a short video to explain further if you would like more information: https://youtu.be/9yFiX8_ceM8

In the rare occurrence when REFCLs operate during a fault on the network, they can sometimes impact reliability and cause electricity supply to stop to some customers unnecessarily. Powercor is considering whether to invest to fix reliability when REFCLs operate. Which of the following options would you prefer? *Answers provided after seeing full bill impact.*

Base: All respondents (n=600)

PREFERENCE FOR IMPROVING RELIABILITY IN WORST SERVED AREAS



- The majority of respondents were willing to pay \$0.55/year to help improve reliability in worst served areas.

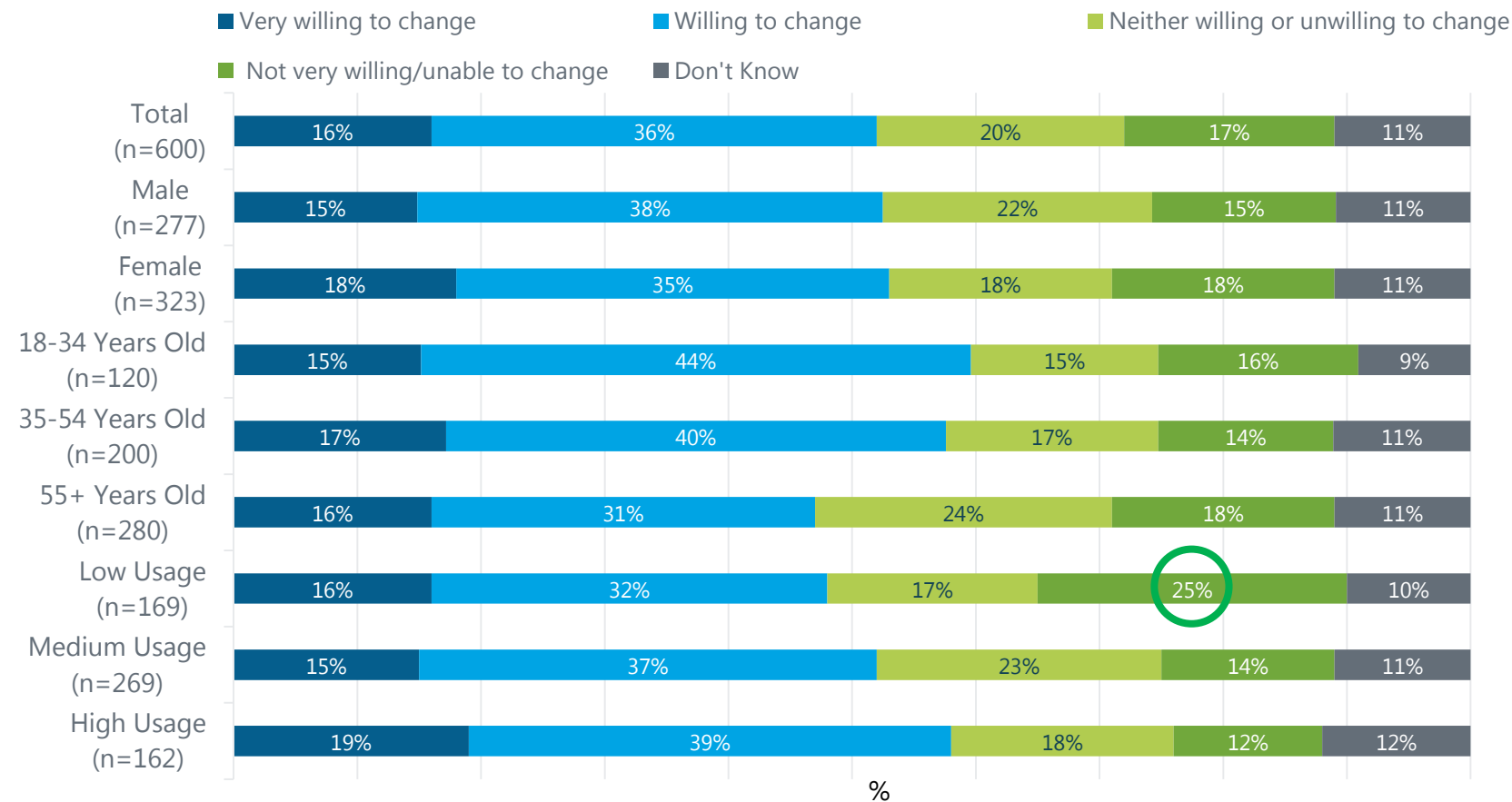
Q33a. Many customers have said they would like to see an improvement in the reliability of electricity supply in worst served areas of the Powercor network. Some of these areas include farming communities that require electricity for their operations and food production. Powercor is considering upgrading the power lines to three phase power in these areas. This means a more reliable supply for those people who are at the end of the lines and may currently experience more outages, and for longer, than everyone else. The cost of this would be spread across all customers and would be 55c a year.

Which option do you prefer? *Answers provided after seeing full bill impact.*

Base: All respondents (n=600)

A blurred image of two people walking, overlaid with a word cloud containing terms like 'Inspiration', 'Experience', 'Innovation', and 'Network'. The image is split into a solid blue left half and a white right half. The word cloud is centered across the white half, with words appearing in various sizes and orientations, some overlapping the figures of the people walking.

WILLINGNESS TO CHANGE ELECTRICITY USAGE TIMES

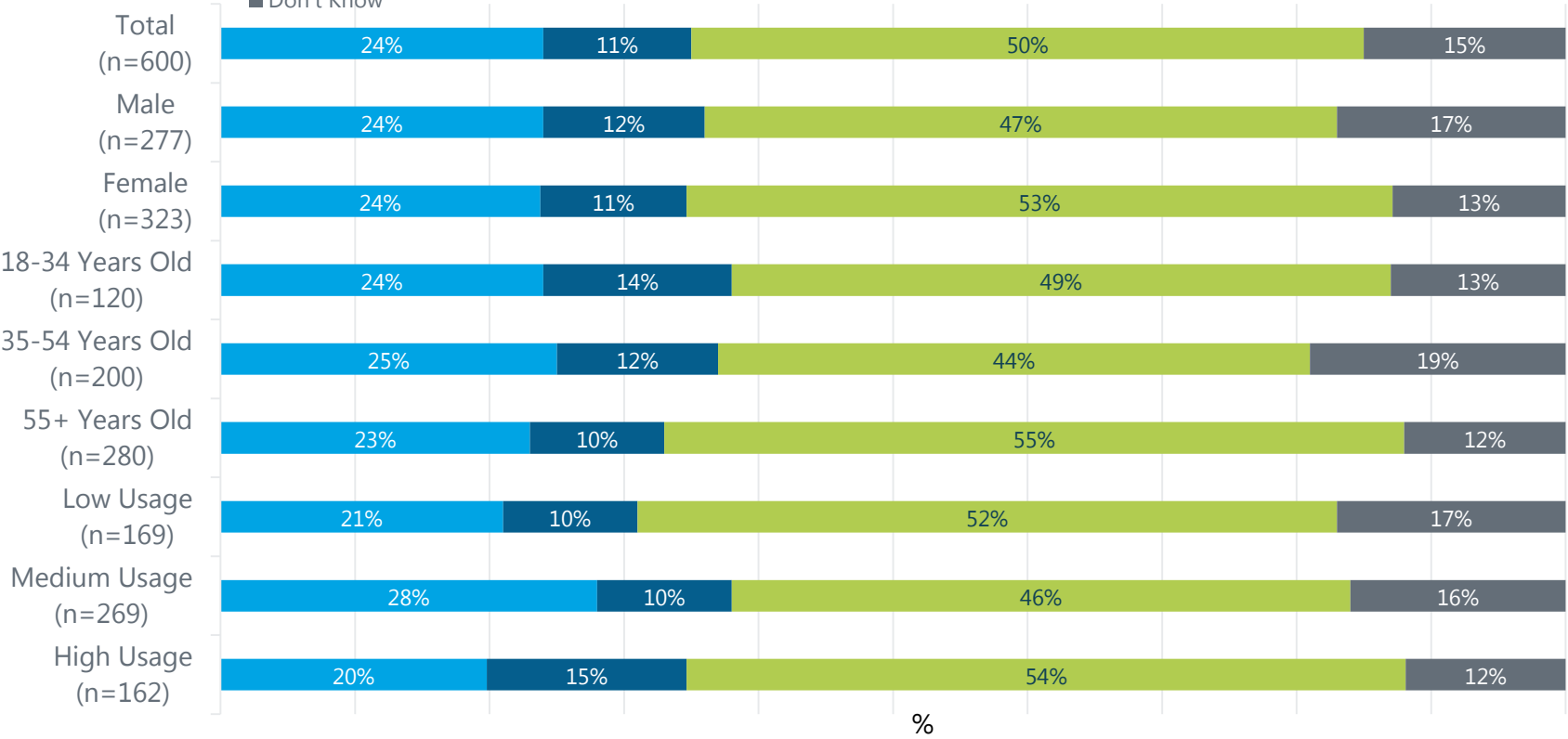


- More than half of respondents (52%) indicated they were willing to change their usage times if they could save money.
- Low usage households were significantly more likely to indicate they were not willing/unable to change (25%).
- Vulnerable households were significantly more likely to indicate they are willing to change (61%)

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=600)

TRANSITIONING TO 'TIME OF USE' PRICING

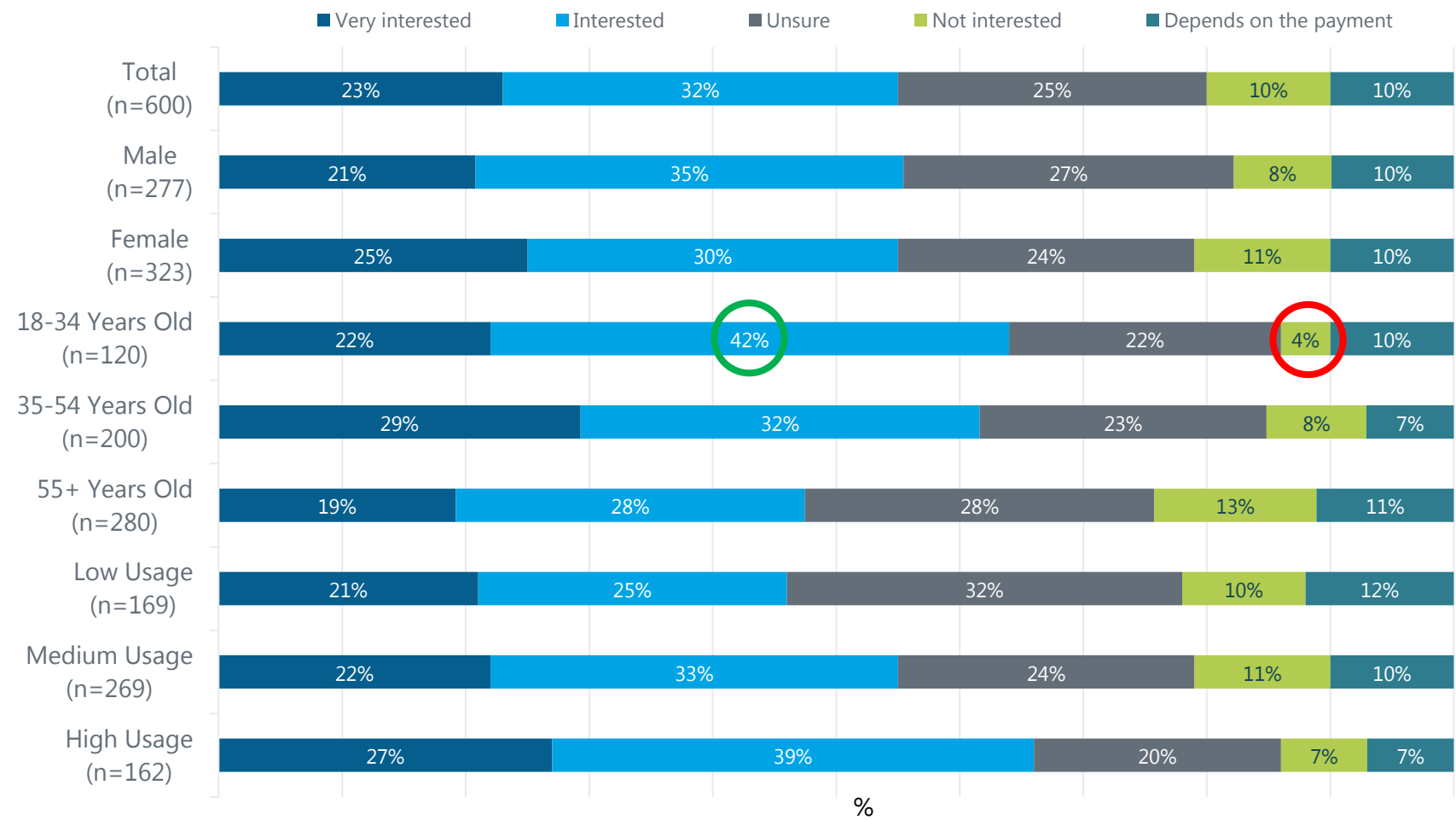
- Everyone should be put on it straightaway (unless they 'opt out') so everyone can start to use electricity at times when it is cheaper
- New homes, homes with solar and homes with electric vehicle charging should be put on it straightaway
- People should be able to 'opt in' to the new system (choose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



- Half of respondents felt that 'time of use' pricing should be an opt in system (50%) – this was consistent across all demographics.

Q34. If this Time of Use system were to be introduced, how do you think customers should be moved onto it?
Base: All respondents (n=600)

MONETARY INCENTIVE FOR SHIFTING USAGE



- Most respondents (55%) are interested in receiving a payment for shifting usage.
- 18-34 year olds are significantly more likely to be interested.

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=600)

ALTERATIONS IN WILLINGNESS TO PAY FOR CHANGES

Option	Initial choice for NO CHANGE %	Final choice for NO CHANGE %
Undergrounding poles Base: All respondents (n=600)	35	34
Improving unnecessary outages from REFCLs Base: All respondents (n=600)	36	35
Ability to export excess solar power Base: Respondents who think the cost should be spread across all customers (n=144)	38	36
Improving reliability in worse served areas Base: All respondents (n=600)	39	39
Investing in technology for reliability, safety & encourage renewable energy Base: All respondents (n=600)	43	40
Pole replacements per year Base: All respondents (n=600)	58	57
Access to data Base: All respondents (n=600)	64	62
The speed to answer calls Base: All respondents (n=600)	85	82

- 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=600)

SUMMARY OF PREFERENCES

Undergrounding poles		Improving unnecessary outages from REFCLs		Ability to export solar power*		Improving reliability in worst served areas	Investing in new technology		Access to data		Pole replacements		The speed to answer calls	
No Change +\$0 Survey 34%		No Change +\$0 Survey 35%		No Change +\$0 Survey 36%		No Change +\$0 Survey 39%	No Change +\$0 Survey 40%		No Change +\$0 Survey 57%		No Change +\$0 Survey 62%		No Change +\$0 Survey 82%	
Improve Survey 66%		Improve Survey 65%		Improve Survey 64%		Improve Survey 61%	Improve Survey 60%		Improve Survey 43%		Improve Survey 38%		Improve Survey 18%	
43% Option B Underground in bushfire areas ending 2030 +\$2.60/yr	23% Option C Underground in bushfire areas ending 2025 +\$5.10/yr	21% Option B Approx 500 customers experience outages +\$0.30/yr	44% Option C No customers experience outages +\$0.60/yr	29% Option B All can export up to 5kW +\$3.50/yr	35% Option C All can export unlimited +\$20.00/yr	61% Option B invest to improve +\$0.55/yr	29% Option B Improve reliability & safety +\$3.50/yr	31% Option C Improve reliability safety, & encourage renewable generation +\$4.90/yr	15% Option B Next day w 15min intervals +\$1.20/yr	23% Option C Real time w 15min intervals +\$1.40/yr	23% Option B 2000 replacements/year +\$5.40/yr	11% Option C 3000 replacements/year +\$10.70/yr	10% Option D 5000 replacements/year +\$21.50/yr	20% 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.

TOTAL AMOUNTS WILLING TO PAY FOR CHANGES

Option	Total (n=600) %	Male (n=277) %	Female (n=323) %	18-34 Years Old (n=120) %	35-54 Years Old (n=200) %	55+ Years Old (n=280) %	Low Usage (n=169) %	Medium Usage (n=269) %	High Usage (n=162) %
\$0 → not willing to pay for any changes	16	20	12	12	16	17	22	16	8
\$0.01 – \$5.00	20	18	22	19	23	18	21	21	17
\$5.01 – \$10.00	22	18	26	22	21	23	19	19	30
\$10.01 – \$15.00	21	22	19	30	16	20	17	22	22
\$15.01 – \$20.00	8	8	7	6	9	7	8	6	11
\$20.01 – \$25.00	7	6	7	5	8	7	5	9	5
\$25.01 – \$30.00	2	2	2	1	1	3	3	2	2
\$30.01 or more	5	6	4	4	5	6	5	6	4
Average	\$9.86	\$9.80	\$9.93	\$9.89	\$9.40	\$10.19	\$9.17	\$9.90	\$10.56

- 16% of respondents were not willing to pay for any changes at all.
- Nearly two-thirds of respondents were willing to pay up to \$15 extra in their annual bills for changes.
- Those aged over 55 years and high usage respondents were slightly more likely to be willing to pay more on average.

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 **\$24** 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=600)

DEMOGRAPHICS

DEMOGRAPHICS

	All respondents %
Age	
18-24	5
25-34	14
35-44	19
45-54	15
55-64	21
65 or over	26
Gender	
Male	50
Female	50

	All respondents %
Speaks a language other than English	
Yes	5
No, just English	95
Aboriginal or Torres Strait Islander	
Yes	3
No	97
Household income	
Under \$20,000	13
\$20,000-\$59,999	38
\$60,000-\$99,999	24
\$100,000-\$149,999	11
\$150,000 plus	5
Prefer not to answer	10

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=600)

DEMOGRAPHICS

	All respondents %
Residency	
Tenant	33
Home owner	67
Housing	
Stand-alone house or dwelling	86
Townhouse or semi	5
Apartment or unit complex	9
Usage	
Low (under 1000)	28
Medium (1000 - 1500)	45
High (1500+)	27

	All respondents %
Household makeup	
Single household	24
Couple living together with no children	37
Shared household	8
Family household with children still at home	32
Vulnerability	
Had to borrow money to pay a bill	14
Had to ask for an extension or paid late	10
Been on a special payment plan	8
Been disconnected due to inability to pay	1
None	76

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=600)

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Residential Survey | Phase 4

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