

# **POWERCOR, CITIPOWER AND UNITED ENERGY EXTERNAL CONSULTATION INSIGHTS**

---

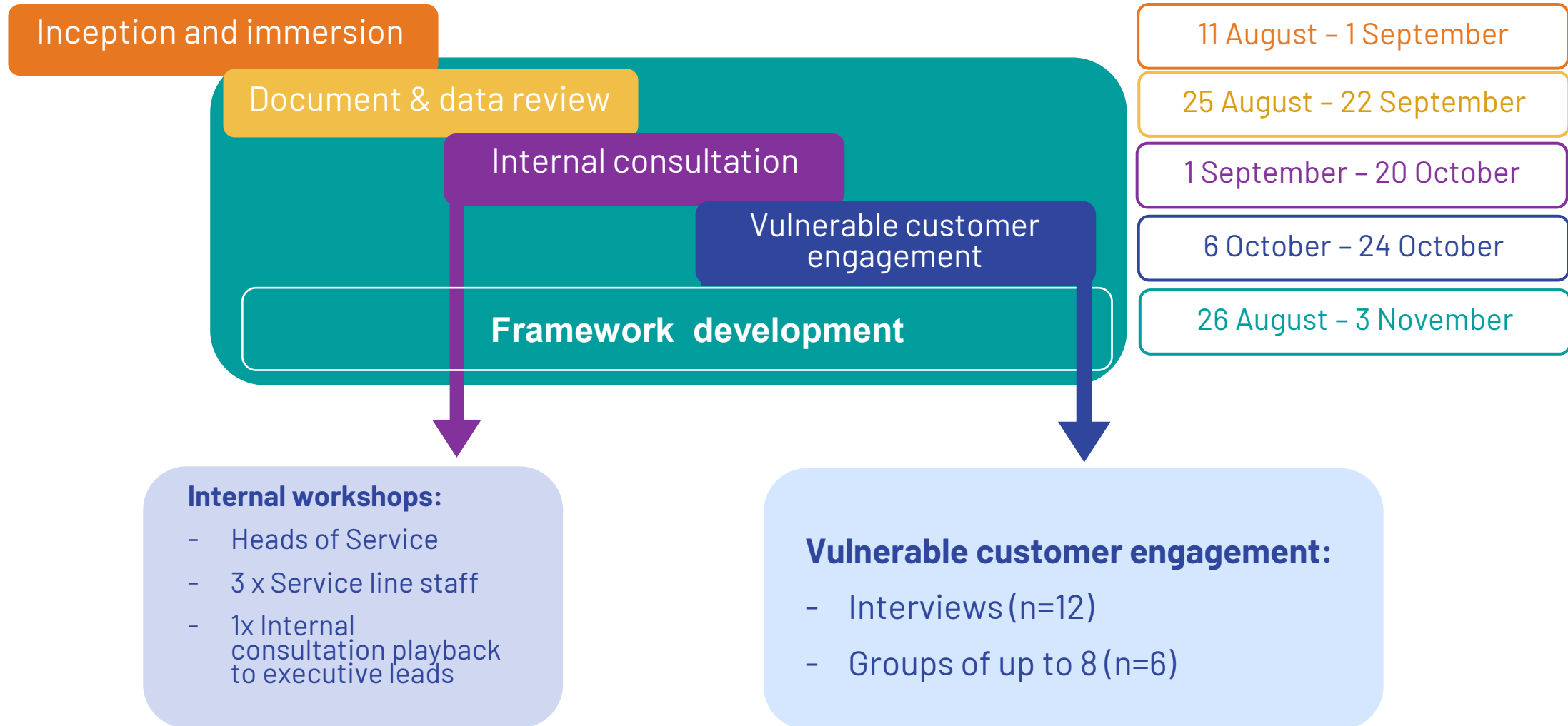
November 2025

**Findings to  
complement the  
shared creation of a  
Vulnerability  
Strategy**

**GAME CHANGERS**



# PROGRAM PHASES



## SAMPLE FRAME

	Primary sampling factor	Secondary sampling factors	Common requirements
<b>G1</b>	Young-mid male (18-40)	Powercor Extended / frequent outage areas	Each participant must be sole or jointly responsible for managing access to household electricity.
<b>G2</b>	Young-mid female (18-40)	CitiPower	Each participant must have experienced bill stress in the last 2 years.
<b>G3</b>	Young-mid male (18-40)	United Energy Extended / frequent outage areas	Each group to include a mix of people with at least one of a range of different vulnerability factors, including:
<b>G4</b>	Older female (41+)	Powercor Extended / frequent outage areas.	* Culturally and Linguistically Diverse (CALD)
<b>G5</b>	Older male (41+)	CitiPower	* Low income
<b>G6</b>	Older female (41+)	United Energy Extended / frequent outage areas	* Low literacy
<b>Int 1</b>	Life support:	Powercor Extended / frequent outage areas	* Single parents / young child
<b>Int 2</b>	Life support	CitiPower	* Rental tenant
<b>Int 3</b>	Life support	United Energy Extended / frequent outage areas	* Disability
<b>Int 4 &amp; 5</b>	SMBs	Powercor	* Carer of Elderly / disability
<b>Int 6 &amp; 7</b>	SMBs	CitiPower	Bill stress.
<b>Int 8 &amp; 9</b>	SMBs	United Energy	Bill stress.
<b>Int 10</b>	Community support services	Family violence services staff	* Energy supply dependent business
<b>Int 11</b>	Community support services	Financial support services staff	* Bill stress
<b>Int 12</b>	Community support services	Emergency/extreme weather event support staff	* Energy supply dependent business
			* Bill stress

## PARTICIPANT CHARACTERISTICS

Category	Group Participants	Interview participants	Total
<b>Total participants</b>	<b>34</b>	<b>17</b>	<b>51</b>
<b>Customers total</b>	34	13	47
<b>Gender</b>			
Male	13	7	20
Female	21	5	26
Non-binary/Other	0	1	1
<b>Age bracket (customers)*</b>			
Young-mid (18-40)	14	3	17
Older (41 and above)	20	3	23
<b>Network Area</b>			
CitiPower	11	3	14
Powercor	11	3	14
United Energy	12	3	15
<b>Vulnerability risk factors</b>			
CALD	8	2	10
Disability	16	1	17
Carer	12	1	13
Parent, one child under 4 years	5	1	6
On life support	1	3	4
Energy-dependent SME	0	6	6
<b>Support Service Organisations</b>		4	4
Cota Vic		1	1
Brotherhood of St. Laurence (BSL)		1	1
Consumer Action Law Centre		1	1
Financial Counselling Victoria		1	1

# TOPLINE SUMMARY

## Key findings across all external consultations

### DISTRIBUTORS ARE NOT DIFFERENTIATED IN TERMS OF SUPPORT AND RESPONSIVENESS

Consultations highlighted that outage frequencies were variable across the distribution networks; perceptions towards communications, support and responsiveness were not polarising for customers. Support for at-risk customers, though, is an area that is little understood in terms of distributor impact.

There is an opportunity for distributors to play a clearer role in supporting those at-risk of vulnerability, and in mitigating risk factors.

### VULNERABILITY IS COMPLEX AND ENCOMPASSES ALL CUSTOMERS

Determinants of vulnerability are difficult to isolate; individual and situational factors are often compounding, meaning risk-factors can be discreet until a critical stage is reached.

Customers, advocacy groups and small business owners understand this, and there are signs that extrinsic elements, such as a high-inflation and cost-of-living environment, are driving up vulnerable characteristics among previously 'secure' cohorts, such as middle-high income households.

### THE ENERGY TRANSITION COMPLICATES INDIVIDUAL FINANCIAL CIRCUMSTANCES

Some customers see the energy transition as personally financially beneficial, reducing energy bills. Others are sceptical and believe big-corporates and government are pursuing an agenda that drives up household costs. Distrust in sources of information relating to electrification and a move away from gas is high.

Initiatives and messaging from distributors, sometimes viewed as a 'neutral' party (in contrast to retailers), might work to build comprehension and create better outcomes for those facing hardships.

# LIFE SUPPORT (LS) CUSTOMERS

# 1

**Consolidated findings**

# LS CUSTOMERS DO NOT CONVEY 'CRITICAL NEED', BUT CIRCUMSTANCES ARE PRECARIOUS

All three customers interviewed had multiple and interconnected vulnerability factors: living on low income (pension), living in rental accommodation, compromised health, financial stress. If outages occur, the impact is substantial. Despite this, they maintain a positive view of distribution networks, particularly with experience of receiving advance notification of planned outages so they can create management plans.

LS customers carefully manage their budgets to ensure they are able to pay energy costs. One customer ranked electricity as being as critical as food, and actively reduces electricity use to minimise costs (for example, by not replacing a broken dryer, and checking energy star ratings on equipment).

Variable levels of detail conveyed in terms of individual backup strategies in case of outages might reflect the extent to which they are dependent on energy to survive (literally), and local network reliability. For instance, the CitiPower customer interviewed used to need CPAP apparatus to for up to 16 hours per day, but now only needs it at night. They also live in a low (no) unplanned outage area. While they remain worried about losing power, they're no longer sufficiently motivated to set up a detailed strategy for unplanned outages, and now just have a list of friends/ family accommodation options to utilise if there is an extended outage. This customer, despite acknowledging these possibilities, is not sure how it would work in practice.

The United Energy customer in a high outage area maintains multiple backup systems; at least two oxygen bottles (six hours each) and fully charged phones to call for help. All other electricity uses are secondary to oxygen.

## Sample details

n=3 interviews

1 per network

1 male, 1 female, 1 non-binary person.

## Considerations

LS customers are often optimistic and pragmatic but their circumstances suggest little room for 'error' should an outage occur.

It is recommended that proactive communications are maintained with these customers during, and outside of, outage events.

# CASE STUDY: A VICTORIAN CARER'S EXPERIENCE WITH LIFE SUPPORT ENERGY NEEDS



*In Bonbeach, Victoria, a full-time carer supports her partner with end-stage COPD who requires 24/7 oxygen concentration while raising their 10-year-old grandchild on a pension. Living in a rental for eight years, they face non-negotiable electricity costs for life-sustaining medical equipment—the oxygen concentrator she calls "the one thing we cannot do without."*

*Despite her tight financial situation and frustration with the retailer for inconsistently applying the life support rebate, and the lack of resources to ease the cost of electricity through improvements such as solar panels, she maintains a pragmatic outlook: "It is what it is. We have a home."*

*The psychological burden of caring for a life support patient manifests as constant vigilance—phones always charged, oxygen bottles at the ready in case of outages, torch within reach. Despite only experiencing one 15-minute outage since living in her rental home, her sense of responsibility towards her partner drives a persistent underlying anxiety about the reliability of energy supply. She manages this emotional toll through careful*

*organisation and preparedness.*

*She values United Energy's proactive SMS alerts and warnings ahead of planned or potential outages and believes that they understand her household's vulnerability. However, she lacks clarity over what support they would provide in the event of extended outages and hopes that they have clear protocols that would prioritise her household in this scenario.*

*Her experience with United Energy has been positive, giving her measured optimism that continued engagement will strengthen support systems. She asks for more communication in the face of outages, such as a welfare check phone call during extended outages, and prioritising life support households in these events. For her household, reliable power isn't about convenience but survival, and clearer communication would transform current confidence into genuine security.*

*- United Energy customer*

# **SMALL-MEDIUM BUSINESS (SMB) OWNERS**

**Consolidated findings**

# 2



# SMB OWNERS' ATTITUDES TOWARDS OUTAGES REFLECT DEPENDENCY ON SHORT-TERM CASHFLOW

Conversations with SMB owners highlighted that business operations are inextricable from their day-to-day lives. The characteristics of their business determine impacts on their business during outages. In this way, vulnerability can affect business owners in similar ways to other individuals.

For instance, a restaurant owner cannot operate at all during an outage (food spoilage, workplace and customer hygiene concerns), creating immediate cashflow shortfalls as there is no footfall in their business during these moments.

Others, however, might run businesses with longer-term lead times in terms of revenue recognition, or may have staff in other locations (not affected by outages) that can take on tasks if needed. Reliance on machinery and equipment (from industrial printers through to phones or laptops) also predetermines vulnerability risk; interviews highlighted that most small business owners are dependent on technology working at all times.

None of the SMB owners contacted experienced regular outages, but some had experienced debilitating ones in the past that created negative financial impacts.

## Sample details

n=6 interviews

2 per network,  
4 male, 2 female.

All energy dependent businesses and had experienced recent bill stress.

# SMB'S CAN AND DO EXPERIENCE VULNERABLE STATES; DISTRIBUTORS SHOULD CONSIDER OWNERS AS AT-RISK

## WORK IS INEXTRICABLE FROM LIFE

Inherent to SMB owners' energy needs, and outage impacts, is a fact that there is little notable delineation between work and life. Energy needs and financial dependence on work are intertwined.

## OUTAGE IMPACTS RANGE FROM IMMEDIATE TO LONGER-TERM

In either case, shared experiences of outages suggest there are not many mitigations in place, or some mitigations are considered (such as purchasing battery-operated phone/laptop chargers) and discarded. Owners interviewed operate on lean margins and are often poorly-resourced, or sole traders.

## COMMUNICATIONS ON OUTAGE TIMINGS ARE DESIRED

An expectation that retailers and distributors communicate in relation to planned or unplanned outage timings, and steps taken to rectify, is currently unfulfilled. SMB owners believe that the two entities should 'speak' to each other during events, to optimise communications and supports (greater distinction in terms of what retailers and distributors should respectively do was not offered, as knowledge of the roles of each was limited). This is a service-gap that will serve to reassure SMB owners, helping them to forecast and manage their business within their means.

# CASE STUDY: THE COMPOUNDING EFFECT OF BUSINESS AND PERSONAL COSTS



*Theo lives in regional Victoria and runs his own business. His work uses large industrial printers and advanced digital technologies, and he has contracts in Australia and in offshore markets.*

*Theo works predominantly from home, while caring for his daughter who has a chronic and debilitating illness.*

*Power outages are uncommon, but when they have occurred, they have been for prolonged periods; up to 24 hours. One outage resulted in him losing all the work he was progressing on his laptop and being unable to generate a hard copy because he could not use his printer. He missed a delivery deadline to one of his offshore contracts, meaning a payment was delayed to him for a period of months. He suffered reputational damage as a result and says he also thinks he lost future business.*

*Besides the substantial business impact, his sick daughter was also negatively affected in a way which he*

*described as “extremely unpleasant and stressful”. Her illness requires consistent temperature regulation (heating and cooling) and also leaves her sensitive to gut microbiome issues brought on by spoiled food. Without a functioning freezer or refrigeration for a day, he had to throw out all their food as a precaution, resulting in further costs as a result of the outage.*

- United Energy customer

# **SUPPORT AND ADVOCACY GROUP INTERVIEWS**

**Consolidated findings**

# 3

# SUPPORT GROUPS UNDERSTAND THAT VULNERABILITY IS COMPLEX, UNCATEGORISABLE, PREVALENT, AND INADEQUATELY SERVICED

Advocacy group conversations provided a useful overlay to customer discussions; the focus was not on individual network performance, but a prevalence and wide-ranging spectrum of vulnerability across communities, and retailer accountability.

Retailers were often described as primary touchpoints for customers experiencing hardship or vulnerability; a problematic dynamic when retailer prerogatives are perceptibly concerned with debt-collection. It was noted that this model is not compatible with the need for genuine support among some customers, particularly those fleeing or involved in family and domestic violence situations. For instance, those most in need, it was said, are not often listed as account holders, meaning that their individual circumstances are controlled by perpetrators, or not in view of retailers.

*Who* experiences vulnerability was another key topic of conversation and is changing. A number of comments were made about hardships experienced by middle-high income households, which previously would not constitute a 'typical' at-risk cohort. This was said to be due to rising cost-of-living pressures, including energy costs and mortgage stress.



*[Many people] are only one incident or event away from a crisis.*

## Sample details

n=4 interviews; one interview contained representation from two support groups, while the remaining n=2 were one-on-one respectively.

Representation consisted of senior family and/or elder violence, financial and extreme weather support staff respectively.

# CASE STUDY: A DYNAMIC OF ‘UNDERCONSUMPTION’ AMONG THE ELDERLY



*Lin is a 70-year-old woman who came to Australia as a refugee and established a comfortable middle-class life with her husband. They have one son, own their own home and have gotten by on the pension for several years. However, increases in the cost-of-living - such as fresh food and access to medical care for her husband - have increasingly strained her capacity to pay for essentials and she is now cutting corners where she can.*

*Lin doesn't know who to ask about help for managing her energy bill, she distrusts government and thinks retailers are only after her money. As a result, she has effectively disengaged from looking at options to make her power more affordable. She grew up in a culture which values stoicism, and the attitude of "I can do without" sees her now independently doing all she can to save money on power consumption, including by reducing her heating and cooling.*

*Her underconsumption has negatively affected the health of her husband, who suffers from multiple chronic*

*illnesses. It has also reduced Lin's quality of life, as she now avoids socialising in her home, or becomes anxious about the cost of having people over due to related power expenses. Her priority now is to do whatever she can to keep her home because even though her son is settled in dual-income, middle-income households, he is also struggling with cost-of-living pressures, paying higher rents and getting caught up in of buy-now-pay-later schemes on multiple credit cards.*

*When Lin talks to friends her age and older, it gives her at least some comfort that she is not the only one forgoing heating and cooling in order to make ends meet and leave something behind after she is gone.*

[Persona created based on advocacy discussions]

# ADVOCACY GROUPS BELIEVE MORE CONTROLS CAN BE IMPLEMENTED THROUGH THE ENERGY SUPPLY-CHAIN TO SUPPORT THOSE IN NEED

## OPEN COMMS BETWEEN RETAILER AND DISTRIBUTOR

To mitigate the retailer-customer support gap, advocacy participants state that clearer lines of communication can be created between distributors and retailers to 'flag' vulnerable cases across organisations or share learnings/experiences to minimise ongoing hardships.

## BUILD UNDERSTANDING OF HARDSHIP PREVENTIONS

While it is acknowledged that distributors can offer on-the-ground support in some cases, or inform customers about external support services, there is low-knowledge among customers about existing measures in place. For example, many financial institutions offer subsidies or supports for those claiming financial vulnerability. Such options are underutilised presently. Distributors might be able to assist in sharing knowledge of such mechanisms.

## TAILOR VULNERABILITY PREVENTION PLANS

Unanimously, advocacy interviewees stated the importance of customising support plans for individuals or households, depending on their circumstances. This can include targeted communications planning during outages or developing a longitudinal database of customer characteristics so the capacity to offer individualised support increases over time.

*Outage impacts range from immediate to longer-term*

# CUSTOMER FOCUS GROUPS

Consolidated findings

# 4



# EXPERIENCES WITH OUTAGES ARE INCONSISTENT; POTENTIAL RISKS ARE VIEWED AS LOW-URGENCY

Customers view outages, and the ensuing risks they create, through their lived experiences. These experiences, for the most part, are with shorter (1-4 hour) outages. Longer outages (up to a day or more) are rare, but have been occasionally experienced in the past, and often are due to accidents or weather events. In these instances there is a less critical view of the distribution network as it is not seen as their 'fault'.

Stories of these experiences did not highlight any critical or deeply concerning needs; there were annoyances and frustrations, such as being uncomfortable without air conditioning, or laptop batteries running out.

However, reading between the lines, there is an aspect of 'issue-avoidance'. When customers were pressed on any impacts experienced outside of the minor examples shared, it was agreed that a long-term outage could be challenging, and that many were unprepared for that possibility. Speculating on what they would need during these events, communications from retailers and/or distributors are a baseline expectation, and crucial. To be able to plan ahead, an understanding of what caused an outage, and projected timeframes, will help.



*A [long-term outage]; I can't even imagine that. I guess I would need to know what caused it, and what I am in for.*

*(Male, United Energy)*

*If [an outage] went for days, I would probably check on my [elderly] parents. We'd be fine, but they'd need help.*

*(Male, Powercor)*

## Sample details

n=6 groups; 1 male and 1 female group per network

34 participants total

# VIEWS ON THE ENERGY TRANSITION ARE SPLIT; SOME ARE PROACTIVELY ADDRESSING, OTHERS SEE COST BURDENS

Many customers were unsure about what the energy transition would mean for them.

Some shared that they are looking for renewable or electrified options circumstantially, such as those who are recent home purchasers, building a residence or considering buying a new car. These considerations are made with cost in mind (a perception that it will be cheaper over time to invest in these options), with less emphasis on environmental sustainability.

Conversely, a degree of scepticism was encountered within the theme of cost, too. Those not investing in the energy transition proactively claim that prices are prohibitive, and often distrust the public-political discourse (government, corporate, media) towards moving away from gas. Government sources are not seen as credible or objective for those who are sceptical.

This split highlights a need for considered information sharing, and for distributors to consider how to build trust in communities so information provided is believable. This applies to both low and medium-high income households, many of whom are facing financial pressures.



*I just do not believe that [the energy transition] will make things cheaper. It's a lie to get people paying more."*

*(Male, CitiPower)*

*[Our household] is doing it slowly; we have an electric cooktop. Our next car will be a hybrid."*

*(Male, United Energy)*

# CUSTOMERS FROM ACROSS ALL NETWORKS SHOW VARIABLE SATISFACTION WITH COMMUNICATIONS

## Communications improve the capacity to plan ahead

Mostly, customer were grateful for the networks' often proactive approach to managing planned outages, and for swift acknowledgement when there were unplanned outages. In some cases, people claimed to have received no communications during unplanned outages, which forced them to conduct their own investigation/research (such as visiting the distributor website).

For unplanned outages, customers acknowledged that communications about when power would be restored (when received) were usually overestimates, creating a sense that customers would not be given a deadline which networks then couldn't deliver. Many also were aware of the online services that provide in-time updates.



*I [like] the SMS [function]. I forward it to everyone in the family [during an outage]."*

*(Female, United Energy)*

*I didn't hear anything; is this [outage] going to go for one-hour or one-week?"*  
*(Male, CitiPower)*

# CASE STUDY: THE PERSONAL NATURE OF POWER DEPENDENCY



*Leo lives in his late mother's older house in an outer metropolitan suburb. The home is unremarkable in terms of its reliance on traditional power sources.*

*He spends his time passionately engrossed in creating code using AI and studying computing philosophy. If there was a sudden power outage, his greatest concern is about losing access to the internet and related technologies. He knows he would need to deal without refrigeration, mobile phone charging, and lighting, but these are not his primary concern.*

*Leo lives with a disability and uses ChatGPT as a mediation tool. He considers the possibility of losing access to ChatGPT as his greatest concern because it profoundly impacts his quality of life. To him, access to this technology offers him a sense of calm he cannot do without. Reflecting on the possibility of a prolonged outage, he said that without access to web-based technology, he would be in "a state of despair."*

- CitiPower customer

# NOTABLE CONSIDERATIONS

# 5

# IMPORTANT CONSIDERATIONS, AND RECOMMENDATIONS

## RENEWABLE ENERGY MARKET DYNAMICS ARE COMPOUNDING UNDERLYING VULNERABILITY FACTORS

Mentions were made across all cohorts of the practices of contracting entities (often 'peddling' solar) as taking advantage of isolated, rural or elderly customers, aggressively selling high-cost energy products and creating a general distrust towards the total energy-supply chain. Further, low feed-in tariffs and confusing rebate systems undermine confidence in solar power.

Distributors must consider how to deliver relevant and genuine information in this environment.

## THE ROLE OF DISTRIBUTORS IN 'SOLVING' FOR VULNERABILITY IS NOT FULLY UNDERSTOOD

Some external consultations acknowledged that retailers maintain primary contact and touchpoints with customers, questioning how distributors can better support vulnerable people. How can they identify vulnerability? What interventions are feasible, beyond what retailers do? These questions are posed with the view, often, that retailers are profit-seeking and therefore potentially poorly equipped to genuinely support those in need.

There is a service-gap that distributors can fill, if the viability of supporting vulnerable customers is demonstrated.

## CATEGORISATION OF AT-RISK CUSTOMERS MUST MOVE BEYOND LS COHORTS

A view among advocacy group interviewees concerned the ability (or lack thereof) to 'categorise' vulnerability, limiting the capacity for distributors, or any entity, to offer support. This acknowledgement raises the question of how vulnerability mitigation can occur in practice.

Customers and support groups noted that, for cases where vulnerability is less easily distinguishable (outside of LS, remote, elderly or 'static' characteristics), distributors need to get creative in how they address them. Initiatives go partway, but a more proactive dialogue across the supply chain might create a longer-term record through which more vulnerabilities can be 'flagged' early and responded to effectively.

# INITIATIVE TESTING

## Key findings

6

# INITIATIVES WERE WELL-RECEIVED, BUT SOMETIMES LACKED IMMEDIATE RELEVANCE

Overall, the initiatives shown were positively viewed. Given the high-level of details provided for each initiative, feedback was not overwhelmingly strong, and nor was there any notable negativity. In sum, nearly all were in favour of these proposals being developed and implemented. Some, particularly advocacy groups, were admiring of the proactive steps being proposed by distributors. All concepts, if implemented, would be welcomed.

More details are provided overleaf in relation to specific initiatives shown.

**Advocacy groups** were surprised that distributors were considering such proposals, and admired proactive steps taken to address vulnerability and other hardships. The future orientation towards the energy transition was also seen as a signal that distributors were “getting on the front foot” before customers are having to consider urgent changes to their power supply makeup (switching off gas, for instance).

**Customers** responded similarly but were softer in their praise. In many cases, customers did not convey that they were in urgent need of financial support (from experience, or speculatively if an outage were to occur, or if energy costs were to rise). Resultingly, the initiatives were seen as positive, inoffensive, but lacking some relevance to them personally. Some were more enthusiastic and could see how the initiatives might offer financial benefits to those most in need, specifically the elderly or those on very low incomes.



# INITIATIVES: WHAT WORKED AND WHAT DIDN'T

**Overall, the initiatives shown were positively viewed.** Given the high-level of details provided for each initiative, feedback was not overwhelmingly strong, and nor was there any notable negativity. In sum, nearly all were in favour of these proposals being developed and implemented. Some, particularly advocacy groups, were admiring of the proactive steps being proposed by distributors. All concepts, if implemented, would be welcomed.

Initiative	Positively viewed aspects	Negatively or cautiously viewed aspects
<b>Energy Care Program</b>	<ul style="list-style-type: none"> <li>Overarching concept supported</li> </ul>	<ul style="list-style-type: none"> <li>Concern about 'doubling up' with retailer support packages</li> <li>Hard to draw distinction between other platforms, such as Energy Compare Victoria</li> <li>Confusion towards who is eligible</li> </ul>
<b>Energy Fund for Inclusive Solutions</b>	<ul style="list-style-type: none"> <li>Overarching concept supported</li> <li>Particular interest among those no longer able to access gas (or soon to be disconnected from gas)</li> </ul>	<ul style="list-style-type: none"> <li>Queries over whether this will be funded by consumers (negative)</li> <li>Queries of whether 'vulnerable' categorisation might be discriminatory to others, as with the Energy Care program</li> </ul>
<b>Vulnerable Customer Assistance Program</b>	<ul style="list-style-type: none"> <li>Broad support; feels applicable to more customer-types than other initiatives</li> <li>Those sceptical towards the benefits of the energy transition and associated perceived costs preferred this option; granularity of proposed cost discounts was appealing</li> </ul>	<ul style="list-style-type: none"> <li>Queries raised about impact of funding on energy prices (and whether they will drive up)</li> <li>Questions asked about whether high-outage area infrastructure should be addressed first</li> </ul>
<b>Regional and rural initiative – Upgrade of SWER lines</b> [Advocacy only]	<ul style="list-style-type: none"> <li>Appealing; a positive and proactive step to reduce isolation-risks</li> <li>A level of (positive) surprise conveyed that a distributor would consider this initiative</li> </ul>	<ul style="list-style-type: none"> <li>Not seen to curtail some of the service gaps outlined by advocacy groups; namely, retailer support inadequacies, and the invisibility of those at-risk from a distributor perspective. Participants do not necessarily expect distributors to 'fill' this gap, but want it noted that the retailer 'failings' are pronounced and concerning</li> </ul>

# THANK YOU

**Lisa Brocker**

Project Manager and Senior Researcher

*Ipsos / Where to*

[Lisa@Wheretoresearch.com.au](mailto:Lisa@Wheretoresearch.com.au)

**David Shannon**

Director, *Ipsos*

[David.Shannon@Ipsos.com](mailto:David.Shannon@Ipsos.com)

**GAME CHANGERS**

