



Supporting
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Square Holes Customer Research

2020-2025
Regulatory Proposal
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SA Power Networks

Customer Research – Full Report

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“To build confidence that the areas for subsequent engagement are well-founded and based on current consumer needs, values and attitudes.”

Network Reliability

- Are customers happy with current reliability levels?
- What about customers in poorly served areas?
- Is it reasonable to expect all customers to pay more to service these areas?
- Tolerances and expectations regarding duration, frequency and communications during outages
- Do these tolerances change if related to a major weather event or NEM event?

Customer communications

- How effective are our existing channels, particularly around planned and unplanned outages
- Communications before, during, and after major events?
- Do our current communications systems enable adequate two- way information flows
- How effective are our communications around quality of supply issues?
- Are current channels adequate? Value of newer digital channels?
- Quality of interaction? Customer satisfaction?
- How do customers want us to communicate with them? How often? What about?
- What individual service experiences do customers expect from us?

Future Network

- What should we do to better enable Distributed Energy Resource connection and hosting on our network?
- How do we support customer choice as we move towards managing the service experience of each individual customer?
- How do we best utilise our existing network assets?
- What service levels are off-grid or near off-grid customers entitled to?
- What do customers want?

Payments for not meeting standards

- What does GSL payment scheme mean to customers?
- Should GSL payments be regarded as inconvenience payments, or penalties to SA Power Networks or compensation?
- Is it fair and reasonable?
- Would a different approach be better?

Other drivers of customer satisfaction

- Day to day interactions
- Security of supply
- Safety
- Infrastructure management
- Environmental performance
- Other experiences

Methodology & Sample Overview

The adjacent tables outline the project approach.

The research methodology included in-depth interviews, focus groups and an online and telephone survey of residential and business customers.

The research focused on South Australian's energy priorities, levels of understanding, concerns, and the future.

Please note that the data presented throughout this report represents data weighted to the South Australian population. A comparison between the weighted and unweighted demographic data can be found in the appendices.

Also, due to small sample sizes for regional segments, percentages should be considered indicative rather than representative.

The project was carried out in compliance with ISO 20252.

Focus Group Overview

Number of groups	8 groups
Sample source	Electronic White Pages/ Square Holes Panel
Collection Dates	30 May – 7 June 2017
Group composition	Group 1 /Adelaide Metro South Group 2 /Adelaide Metro North Group 3 /Adelaide Metro East Group 4 /Adelaide Metro West Group 5 /Renmark Group 6 /Port Lincoln Group 7 /Small/ medium businesses Group 8 /Adelaide Hills
Honorarium	\$50

Online Survey Sample Overview

Sample achieved	n=403 SA residents / n=110 businesses
Sample source	Research only panel supplier
Distribution of survey	Square Holes
Questionnaire length	15 min
Margin of error	5%
Collection Dates	14 June – 19 June 2017

Telephone Survey Sample Overview

Sample achieved	n=402 SA households
Sample source	Electronic White Pages
Distribution of survey	Square Holes
Questionnaire length	15 min
Margin of error	5%
Collection Dates	14 June – 23 June 2017

In-depth interviews Overview

Number of interviews	5: 2 large businesses 3 other stakeholders (Stakeholders: Business SA, Australian Migrant Resource Centre, Financial Council of SA)
Length of interview	15 min
Collection Dates	7 June – 21 June 2017



Research Insights

Electricity – it just needs to work

There is a fundamental expectation that electricity at home and in a business just works – pretty simple. It is not a topic given much consideration other than that. Some throughout the research, particularly those of older age groups, acknowledged how amazing it is to be able to expect this. A light switch is turned on and it just works! There is an expectation that SA Power Networks and other key stakeholders are managing the network as best possible, however there are perceptions this is already occurring, and an assumption from most that work is going on behind the scenes to improve.

There is little desire to hear from SA Power Networks and other key stakeholders more than necessary – i.e. to notify of outages and associated information. There is generally low to no understanding of concepts such as 'security of supply' or 'safety of supply' – just an expectation that the reliability of the supply of electricity would be at a reasonable level. Outages were accepted, particularly if unavoidable due to weather or road accidents, and accepted as largely unavoidable.

There is an expectation that maintenance and improvement of the network is occurring, and when breakdowns and outages are perceived to result from lack of maintenance and sloppy management, this is extremely frustrating to householders and businesses. It all comes back to getting the basics right – electricity supply when required – and that there is a sense of care and transparency when inevitable outages and other problems occur.

“How amazing it is that we’ve got [electricity]. We take it for granted.”

[Focus group: Adelaide Hills]

Network Reliability

- ▶ Strong performance 'to my home'
- ▶ Inconsistent across South Australia
- ▶ **Priority: Timely and trustworthy outage communications**

Customer Communications

- ▶ Generally strong performance
- ▶ Inconsistent awareness/usage of current SA Power Networks communications
- ▶ Demand for timely and trustworthy communications via SMS and digital, primarily
- ▶ Opportunity for education on reducing costs and future networks

Future Network

- ▶ Low level of awareness/understanding of relevance and options.
- ▶ Need for education as to value

Payments for not meeting standards

- ▶ Low awareness of GSL Scheme and low receipt of payments
- ▶ Fair and reasonable, generally
- ▶ Viewed as 'compensation'
- ▶ Payments not viewed as sufficient for some segments [e.g. business]

Other drivers of customer satisfaction

- ▶ General expectation that experts are doing the right thing
 - ▶ Low level of understanding of security, safety and quality of supply
 - ▶ Expectation networks just work and SA Power Networks is getting the 'basics' right
-

Network Reliability

- ▶ **52%** of households & **40%** of businesses indicate extremely good reliability to their home.
- ▶ **7.0** is the average tolerance to household reliability [out of 10].
- ▶ **44%** of businesses indicated their most recent outage was unacceptable [compared to **24%** of households].
- ▶ Average level of acceptance for load-shedding; **3.2** for businesses, **4.0** for households [out of 10].
- ▶ **79%** of households & **72%** of businesses indicated 'more reliable supply' would make the level of reliability to their home/business more tolerable.

Customer Communications

- ▶ **SMS** is the preferred medium for receiving communications from SA Power Networks.
- ▶ Businesses prefer **email** much more than households do.
- ▶ Regional survey participants preferred to be informed about planned outages via **letterbox** or by **phone**, more than other segments
- ▶ **65%** of households prefer to use the phone when communicating with SA Power Networks to report an outage.
- ▶ **70%** of those aged 60+ prefer to check for an unplanned outage via phone, compared to **33%** of those aged under 40.

Future Network

- ▶ **52%** of homeowners surveyed currently own solar PV panels, driven largely by those aged over 60.
- ▶ **24%** of businesses surveyed currently own solar PV panels.
- ▶ **20%** of homeowners surveyed currently own a household smart meter, while **32%** don't know whether it's a plan for the future.
- ▶ **26%** of those aged under 40 plan on having electricity storage batteries in the next 1-2 years.
- ▶ **56%** of households never plan on having an electric vehicle.

Payments for not meeting standards

- ▶ **74%** of households had not heard of the GSL scheme.
 - ▶ **85%** of regional respondents had heard of the GSL scheme.
 - ▶ **5.0** is the average level of acceptance by households that all customers pay for the GSL scheme [regional rate it at **6.2**]
 - ▶ Regional survey respondents rate the condition 'payment for interruption greater than 12 hours' at **8.1**.
 - ▶ **44%** of those dissatisfied with the condition 'payment for interruption greater than 12 hours' consider 0-5 hours a more suitable length of duration.
-

Network Reliability

- ▶ There is a perception that South Australia's electricity supply is unreliable, particularly in regional and outer metropolitan areas, however it was found that South Australians are generally satisfied with the supply of electricity to their *own* home and see it as reliable. However, the perception is that the reliability of *others* is poor.
- ▶ Certain regions [e.g. Port Lincoln] have been concerned about reliability in their area and have been looking for ways to become independent of the grid.
- ▶ There is an understanding that outages are to be expected from time to time, and are tolerated well overall.
- ▶ Businesses are more dissatisfied with network reliability, with concerns it has been impacting business operations and competitiveness in interstate and overseas markets.
- ▶ Load-shedding is considered the least tolerable form of outage, and elicits a strongly negative response.
- ▶ There is support for everyone paying in order to ensure reliable supply across all regions of South Australia.

Customer communications

- ▶ Communications are seen to be good overall, but can be inconsistent. For example, receiving notifications about planned outages during or after an outage [or not at all], or that estimated times for restoration of power have been underestimated are problematic instances that have been expressed by focus group participants.
- ▶ Awareness and use of communications are inconsistent, however SMS and the website/webapp are the most commonly noted means by which households were receiving information from SA Power Networks. Preference for digital communications was clear, however the role of mail or phone was also important for those less inclined to use technology. Preference for contacting SA Power Networks via phone/website changes with age; younger residents tend more to use the website, while older residents tend to prefer the phone.
- ▶ Households tend not to see a need for communicating with SA Power Networks. They prefer to be contacted by SA Power Networks **prior** to an outage, typically by SMS or also by letterbox. They also value communications during outages with regard to estimated restoration time. It is important that the communications are timely, trustworthy and accurate.
- ▶ In addition to SMS, businesses prefer to be contacted by SA Power Networks via email.
- ▶ Opportunity exists for SA Power Networks to use communications as an education tool; i.e. advice to reduce electricity usage, or to convey value and information about future network options.

Future Network

- ▶ There is a low level of understanding of what the future network might entail. Most are in the mindset of expecting the key stakeholders including SA Power Networks to manage and maintain the network as best as possible. Few are thinking about how their household and/or business can utilise future network solutions.
- ▶ Even many of those with solar, are less than convinced of the merits of generating their own electricity. There are many barriers to overcome such as lack of understanding about feed-in tariffs, subsidies and other incentives.
- ▶ In saying this, when prompted with information as to what the future network might entail, there is an acceptance that planning and discussing options is critical. This is particularly the case if the future network will result in lower costs and improved confidence in network reliability.
- ▶ Education is a major gap. Most do not have any understanding of what options are available.
- ▶ Early adopters are likely to be businesses where reliability and the cost of electricity is critical, and regional areas experiencing a higher level of outages and who are more open to being more self-reliant away from the State-wide network.
- ▶ Some are concerned about the lack of affordability of future network solutions for those on lower household incomes and other South Australian businesses and households. There is also concern that those unable to adopt future network solutions may pay more for their electricity.

Payments for not meeting standards

- ▶ The Guaranteed Service Level [GSL] Scheme is known only by 19% of South Australian households – of that group, 40% had received payments. Accordingly, most struggle to discuss and debate the scheme with any depth. Some people recalled automatically receiving the payment, e.g. they were away on holidays at the time.
- ▶ Most believe that the existence of the GSL Scheme is fair and reasonable, although some believed that the amount paid should be higher, and criteria less strict. No notable alternative scheme was suggested by participants across the research.
- ▶ Some across the focus groups believed they should have been eligible, but did not receive payment. This did result in some level of distrust in the system.
- ▶ Generally the scheme was viewed as compensation – a payment to cover the loss of perishables and other losses, somewhat like insurance.
- ▶ A few people across the focus groups considered that the GSL may be a penalty for SA Power Networks for not maintaining high levels of reliability, and accordingly an incentive to maximise reliability of the network.
- ▶ Some debate surrounded the concept of all South Australian households and businesses paying for the scheme, as the money might be best put towards improving the network. Others were cynical that if this was the case, the improvements would not be made.

Other drivers of customer satisfaction

- ▶ Day to day interactions with SA Power Networks and stakeholders other than retailers were noted as rare, and expectations were low.
- ▶ The basic fundamental piece of feedback was to maintain network reliability and minimise outages, and if outages occurred to communicate in a timely and trustworthy manner. Most believed that this already occurred. Although some did not agree that they were well informed.
- ▶ There is a low level of understanding or care about complex elements of the electricity networks. More so there is an expectation that the experts such as SA Power Networks and other stakeholders are managing and maintaining the network as best they can.
- ▶ Understanding of concepts such as 'security of supply,' 'safety of supply' and 'quality of supply' is low. The vast majority had not previously heard these terms. Most, other than households experiencing an above average level of outages, believed that the security, safety and quality of electricity were generally at a reasonable level.
- ▶ Similarly, discussions around infrastructure management were more around the experts doing what is right and responsible.
- ▶ Environmental performance of SA Power Networks and stakeholders was viewed as good. Although most were not particularly confident in discussing this due to a lack of knowledge or information. Some believed that the overall network is heading in the right environmental direction. Others were unclear or even unconvinced that the environmental direction is right for South Australians.

Households →

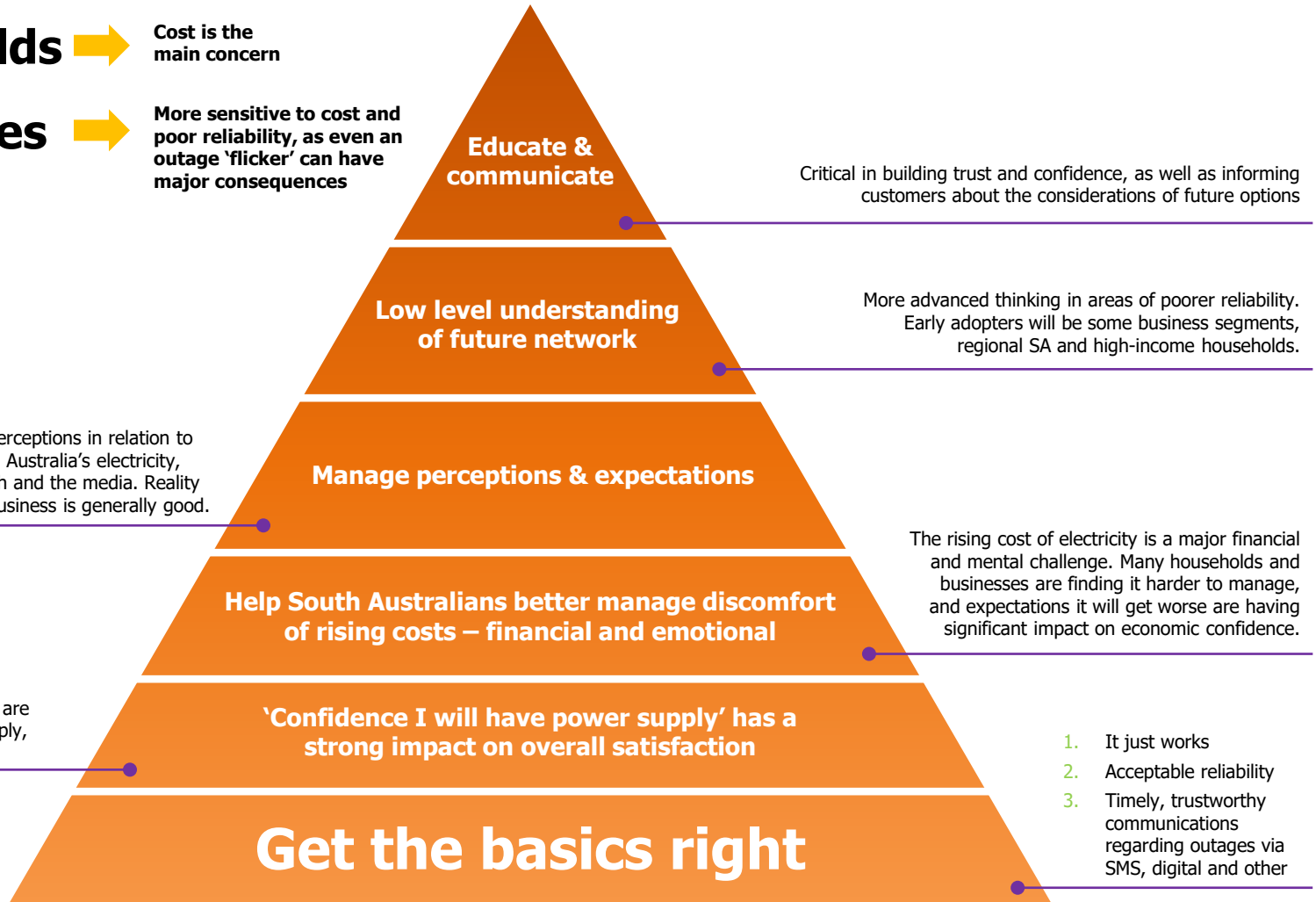
Cost is the main concern

Businesses →

More sensitive to cost and poor reliability, as even an outage 'flicker' can have major consequences

There are generally negative perceptions in relation to the cost and reliability of South Australia's electricity, largely driven by word of mouth and the media. Reality is performance to 'my' home/business is generally good.

Many households, especially regional areas and businesses, are nervous about reliability of supply, which impacts satisfaction.



Negative perceptions, yet typically positive reality

It is evident across the research – focus groups, surveys and in-depth stakeholder discussions – that there is a widely held view that South Australia's electricity is expensive and generally unreliable [initial satisfaction ratings of 6.1 [business] and 5.9 [households] out of 10]. However, for the vast majority of households, on prompting, their satisfaction for their household increases to a rating of 7, with their own personal experience with electricity more positive [for businesses this is slightly less the case, mean 6.4]. There is a level of acceptance of the complexity of the network and the rarity of outages. Most accept that the Statewide outage in the second half of 2016 was an abnormality. By and large organisations such as SA Power Networks are believed to be performing well on reflection. However, media coverage and general conversation around electricity supply is largely perceived as negative. Related to this, there was a lack of understanding and transparency from the Government and key stakeholders in relation to electricity supply, and this is creating a level of distrust.

“From my perspective we have very little outages and when we do they are fixed pretty quick. Forced outages we seem to be the first to come back on. So unreliable and expensive comes from in the news and what we are always talking about, they are still the words that come to mind when you think of power.”

[Focus group: Metro – West]

Discomfort at the rising cost of electricity is the single biggest concern

There is a strong sense that South Australia's electricity prices are high, even inflated, and continuing to increase. For some, this perception is based on seeing their own bills increasing over time. There is a widely held perception that South Australia's electricity prices are rising at a rate well above CPI increases. The strong perception is that high electricity costs are unique to South Australia. Some had used comparison websites and put in interstate locations, and were aware of the price discrepancy. There was difficulty across the focus groups in understanding why costs are not the same across Australia, and why South Australians are disadvantaged.

Some participants noted that in their household, electricity prices had not increased to any significant level, as they were conscious of keeping usage to a minimum and/or had invested in solar power or other technology to monitor their usage. Much of the problem from a householder and business perspective in relation to electricity prices was related to concern that costs would continue to increase, and the corresponding negative impact on economic confidence about the future. For many, the perception that electricity costs are continuing to increase and that there is no solution to reduce them, is creating a fear for their own future prosperity and that of the broader economy.

It is also worth considering that such discussion is more so around the *cost* of electricity to a household or business rather than the *price*. Those feeling unsatisfied, typically criticised rising overall bills, rather than the unit price. There was some sense of feeling helpless at controlling cost as retailers were all perceived as largely similar with confusing contracts.

"It's not one of those bills that you can just suck up, you need to plan for it. It used to be a lot cheaper."

[Focus group: Metro – West]

'Confidence I will have power supply' has a strong impact on overall satisfaction

Beyond concerns surrounding the rising cost of electricity to households and businesses is confidence of supply. While most noted that the reliability of electricity to their household or business is generally good, those with a perception that the reliability of supply is low also reported lower overall satisfaction. For example, areas such as Port Lincoln and the Adelaide Hills reported lower levels of confidence of supply and overall satisfaction, due to a sense that outages were too frequent, disruptive and that they expected further unexpected outages in the not too distant future.

Other households and businesses also had lower levels of confidence of supply, but more so due to lower tolerance levels. For example, the financial and operational cost and risk to businesses for even occasional outages, even just a very short *flicker*, was potentially high. Almost half [45%] of businesses indicated that their business was negatively impacted by the reliability of electricity supply. However, businesses were less likely to indicate they had an outage this year [36%] compared to households [48%]. Tolerance to this was however much lower [mean 4.1 out of 10] compared to households [mean 6.4 out of 10].

From the qualitative discussions businesses perceived that the regularity of outages was increasing, and when unplanned, this could be a significant problem. While they are more willing to accept planned outages with appropriate notice, or even anticipated outages with worsening weather, other unplanned outages could be a major inconvenience. Nervousness that the power supply may be lost at any point in time creates a risk for some households and businesses. Accordingly, some household and business segments [e.g. regions of South Australia, and businesses where electricity supply is mission critical] feel forced to explore back-up and alternative power supplies, such as generators, solar and other options as a priority.

"I notice power outages a lot as I work for myself. I'm a furniture maker and when the power goes out it is quite dangerous if you are handling power tools. When it flickers out it might only be for a moment but it is a bit scary."

[Focus group: Metro – East]

Businesses are less positive than householders

Throughout the research, businesses were significantly less satisfied with the supply of electricity than householders. This is largely due to lower levels of tolerance to outages due to constant electricity supply being mission critical, and financially and operationally costly if interrupted. Further to this, the perceived rising cost of electricity is exacerbating concerns at the ease of running a business in South Australia.

A sentiment noted across business discussions and key business membership groups was that in a State already suffering economic challenges, compounding this with rising electricity costs and at the same time declining levels of confidence of supply is a major concern. Some noted that the concerns were a perception to some level, yet the inability to negotiate better cost contracts and a lack of confidence in the reliability of the network is an economic challenge. In saying this, the challenges and frustrations faced by businesses in relation to electricity supply, also creates an opportunity. Many of the medium to larger businesses involved in the research had been working towards implementing strategies to reduce costs and contingencies to ensure uninterrupted power supply.

“I don’t want any power flicks – that’s what ‘reliability’ means. Thirty one-second blips a year. Costly and disruptive, which is why we have a generator here on site to help us deal with blips. One minute would cost us thousands of dollars and hours of time.”

[In-depth interview – large business]

Throughout the qualitative research [focus groups and in-depth interviews] the idea that the cost of electricity is placing vulnerable South Australians in a challenging situation was noted. Many have been forced to reduce household electricity usage to minimise costs. Concern was raised at vulnerable South Australians who might be switching off air-conditioning or heating to minimise costs, but placing their health and lives at risk.

Another concern is that there will be an increasing gap between those on low and higher incomes and their ability to cope with the changing electricity network. Those with higher household incomes may be more able to explore future network solutions to reduce costs, while those on lower incomes will be forced to rely on a network perceived to be unreliable, and with fewer customers to share the cost of the grid.

Going off-grid or partially off-grid, and attaining levels of self-sufficiency, is perceived as out of reach for most low-income, apartment-dwellers and renters. It was noted as critical across the research, including from key stakeholders responsible for representing vulnerable South Australians, that this will be an increasing issue, and how SA Power Networks and stakeholders manage this is critical.

“There is going to be a huge inequality in the market, where those that own their own homes will be able to put in the infrastructure.”

[Focus group: Metro – West]

There is a sense of a need for fairness and equity in the supply of electricity to South Australians. This includes an acceptance that it is fair and reasonable that 'all customers across South Australia pay more in order to ensure that areas that are more expensive to service, such as regional and remote areas, are adequately supplied with reliable electricity'. This is viewed as a basic fundamental human right and obligation. While most noted that they had a reasonable level of electricity supply to their household or business, there is a perception of inconsistency of reliability across South Australia. Somewhat related to this, there was an agreement that the existence of a scheme such as the Guaranteed Service Level [GSL] Scheme was fair and reasonable.

There is a low level of awareness of the GSL scheme [20%]. Most believe that the scheme is more so '*compensation*' than '*recognising those with poorer levels of reliability*'. Some people did, however, acknowledge that the GSL scheme is also likely to be a penalty for SA Power Networks and therefore an incentive to ensure maximum network reliability is maintained. In the focus groups, many believed the amount paid for outages and the criteria to qualify were often not sufficient to compensate for losses of perishables and other financial losses, especially for businesses. It was, however, difficult for most to discuss the GSL scheme, due to a lack of understanding, and it was not possible to suggest a better scheme.

"We should be getting a reliable system for what we pay."

[Focus group: Port Lincoln]

"I didn't realise we were paying for it, can we opt out, I thought it was just their obligation."

[Focus group: Metro – East]

There is a low level of understanding of future network options

Households and businesses have a generally low level of understanding of future network options. There is a level of expectation that the experts and managers of the system should just manage it in the best way possible to maximise reliability while balancing the cost of electricity. Other than medium to larger businesses and a small number of early adopter householders who have being proactive in exploring future options, the vast majority have a very low level of understanding of future network options or any idea of what the future network might entail [beyond solar PV or a minimal understanding of battery storage]. Even those already connected to solar power, were somewhat uninformed and even skeptical as to what the future network might entail and mean to them.

Many of those with solar power were unhappy with deciding to start generating their own electricity, saying that their systems were often unreliable or not used, and that there was little incentive [e.g. insufficient feed-in tariffs] to generate above their own needs. It was rare to find a household throughout the research actively moving towards going off-grid or near off-grid. There is also a perception that such systems were expensive, and not in the financial reach of most South Australians. Similarly, there was minimal understanding of how electric cars could be used for power generation storage. Accordingly, discussion around the future network often came back to the need for education and support, and financial incentives and subsidising.

"I think they need to make it cheaper, I couldn't afford to pay for these types of things. A lot of people can't afford all that."

[Focus group: Metro – South]

"I don't understand how buying an electric car will give me more power. And us been reliant on solar power, do we buy it or are they going to subsidise us."

[Focus group: Metro – West]

Discussion across the research illustrated that for the vast majority of households and businesses, the adoption of future network solutions is many years away, without education and intervention to speed up this timing. There are some segments of the population more open and informed about future network options, and see these as a potential solution to reduce the cost of electricity and increase confidence of electricity supply. These tend to be households in higher risk areas such as Port Lincoln and the Adelaide Hills, and businesses needing or preferring uninterrupted electricity supply. Further to this, as might be expected, regional areas of South Australia are more aware of the concept of a farm or property going fully or partially off the grid, and accordingly were more open to the concept of future network solutions.

The concept of towns going off the grid is viewed as easy to comprehend and even inevitable for regional South Australians. Many households across South Australia have already commenced researching options, including discussions with friends, families and business associates, and some were well progressed in implementing future solutions. In saying this, the alternative option most cited for households in Port Lincoln and the Adelaide Hills was diesel generators, that were acknowledged as less than ideal, not environmentally friendly and expensive to operate, but the best solutions at this point in time. Some businesses and households were in the process of evaluating and implementing more robust systems using solar, battery storage and other solutions.

“Inevitable, that if batteries get cheaper, more people will slowly go off the grid but this will cause a problem for those who can’t afford batteries, which means an increasing burden of running the network.”

[In-depth interview – stakeholder]

Much of the discussion throughout the research centered around the adequacy of communications. If communication was strong, reliable and timely prior to and during planned and unplanned outages, the tolerance levels are higher. If communication was deemed poor, there was a level of frustration aimed at SA Power Networks and others. Most acknowledge that it is unreasonable to expect all outages to be eliminated. However, there is a need to feel informed and to reduce the stress, inconvenience and disruption associated with outages.

Communications are also important to build trust in the network. Much of the negative perceptions come back to a lack of trust in stakeholders involved in the electricity industry and an inability to understand why electricity costs are continuing to increase [combined with network reliability in some areas not being acceptable]. Some feel that the network is being neglected, foreign ownership means the focus is on profits above the needs of South Australians, and there is little evidence that things will improve in the future. There is a sense from many that the South Australian community is being taken advantage of by electricity retailers and other stakeholders.

SA Power Networks' use of SMS and website to check outages was viewed as performing well and supported. However, awareness that it exists is inconsistent. There is opportunity for SA Power Networks to promote the availability of SMS, website, app, and other communications to empower South Australian households and businesses and to reduce the stress associated with outages. Further to communication gaps, is a lack of understanding about opportunities of the future network, and what it means to South Australians. There is an eagerness to better understand plans for the network in South Australia, and to provide clear and trustworthy information and education as to the options available to households.

"The app was really good, you could see how many people were without power."

[Focus group: Metro – South]



The Story

Key Areas for Focus Group Participants

The focus group discussions culminated into some key areas worth future exploration and planning, including ...

1. How to improve network reliability and reduce community concerns about future electricity supply
2. Pricing and ways households can feel less stressed about rising electricity prices
3. Sustainability of network solutions in the future
4. Future network options – education and opportunities
5. How South Australia can be more self-reliant and less vulnerable with regards to electricity supply
6. Customer communications needs regarding power outages

“The technology is in place and it should be reliable enough that you should know how much electricity you are going to need at any particular time. Things like ‘oh no, it’s a hot day’ shouldn’t shut us down.” [Focus group: Metro – North]

“I can see the future is going to be solar with battery backup and not needing to rely on the Government for power.” [Focus group: Port Lincoln]

“Have people understand the extent to which [SAPN] are responsible. I think most people don’t know who is responsible for any failures which happen. In their interest they should be out there flogging themselves in the media, letting people know what they actually do. I think a lot of people don’t divide up ElectraNet and SA Power Networks.” [Focus group: Adelaide Hills]

Electricity was an easy topic of discussion amongst focus groups and interviews, but misunderstandings and indifference towards the different parts of the electricity supply chain were common amongst households. Some households understood SA Power Networks' general role of distributing electricity, while others perceived transmission or the ability to influence retail costs as part of SA Power Networks' responsibility.

Across the research **cost** was the primary issue of concern.

There was an expectation that supply was constant and available, as it was seen as an essential service to homes and businesses. Additionally, businesses expected a stable supply due to Australia's 'first-world country' standards and the high costs associated with electricity. While there is some tolerance for outages and other inconveniences, outages and vulnerability to weather events were seen by some as an indicator the network was declining in quality, and desired to see improvements over time.

"How amazing it is that we've got it. We take it for granted."

[Focus group: Adelaide Hills]

"You don't have to have gas but you do need to have electricity."

[Focus group: Metro – South]

"Not a lot of positivity in this state about electricity."

[Focus group: Metro – North]

"Value for money is separate to pricing."

[Focus group: In-depth interview]

1. Which of the following apply to you?			
	Total Households	Phone	Online
Responsible, either solely or partly, for managing a household including the electricity and similar services	805	403	402
Responsible, either solely or partly, for managing a business including the electricity and similar services	110	-	-

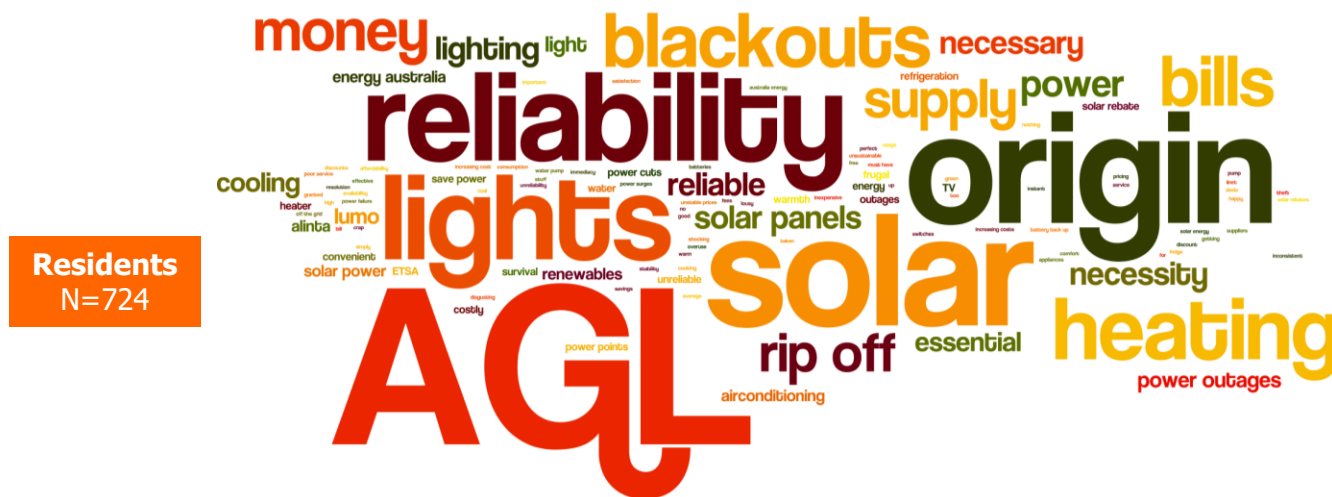
2. Thinking about the following utilities and services to your home, overall, with all things considered, how satisfied are you?										
MEAN SCORE	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Rubbish and recycling	7.2	7.6	7.6	7.6	7.6	7.7	7.1	6.9	7.5	8.3
Phone	6.9	7.0	7.0	6.8	7.2	7.1	6.5	6.7	6.9	7.5
Water	6.9	6.9	6.9	7.0	6.7	6.7	7.7	7.1	6.6	7.1
Internet	6.8	6.7	6.7	6.3	7.1	6.9	5.9	6.5	6.4	7.4
Gas	6.7	6.6	6.6	6.8	6.4	6.5	7.0	6.8	6.5	6.8
Electricity	6.1	5.9	5.9	5.8	6.0	5.9	5.8	6.2	5.5	6.1

When compared to other utilities and services, satisfaction with electricity is rated as lowest.

square holes®

Other key findings from the top of mind associations amongst households were that solar panels were mitigating electricity costs less than they were expecting.

	Words	Frequencies
1	cost	157
2	expensive	138
3	price	63
4	AGL	41
5	solar	39
6	power	34
7	lights	33
8	Origin	29
9	reliability	29
10	supply	17



Top of mind associations with electricity [Survey]

3. When thinking about electricity in your home, what comes first to mind

The terms 'expensive', 'cost', and 'prices', which have dominated the responses, have been removed from these word clouds to better discern other associations. For reference, a frequency table of the top 10 most common words in the responses is included on the right.

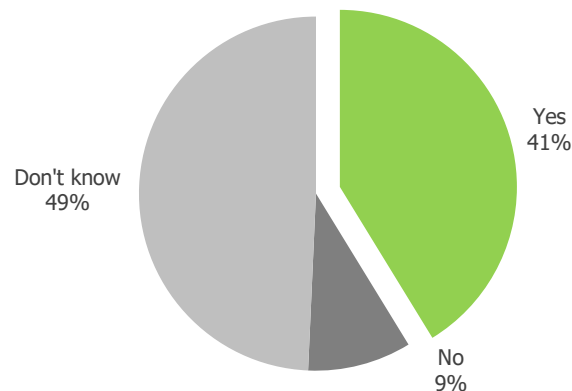
	Words	Frequencies
1	expensive	16
2	cost	15
3	AGL	14
4	Origin	8
5	price	7
6	reliability	4
7	energy	3
8	power	3
9	outages	2
10	supply	2



Household discussions about electricity [Survey]

4. Has electricity supply to your home come up in discussions with friends, family and work colleagues over the past month?

[Online, n=402]



4. Has electricity supply to your home come up in discussions with friends, family and work colleagues, over the past month?

	<\$40K households	Age <40	Age 40-59	Age 60+
Column n	118	147	136	119
Yes	34%	31%	47%	47%
No	8%	16%	8%	3%
Don't know	58%	53%	45%	49%

5. Who did you discuss this with?

	Online	<\$40K households	Age <40	Age 40-59	Age 60+
Column n	166	40	45	64	57
Friends	65%	64%	61%	59%	76%
Family [living elsewhere]	47%	60%	29%	50%	59%
Family [living in home]	46%	36%	47%	50%	41%
Work colleagues	29%	27%	34%	39%	15%
Other	4%	7%	-	10%	2%

6. How did you discuss this?

	Online	<\$40K households	Age <40	Age 40-59	Age 60+
Column n	166	40	45	64	57
Face-to-face	95%	96%	84%	98%	100%
Phone	22%	30%	11%	18%	36%
Social media	12%	15%	19%	15%	3%
Other	<1%	-	-	1%	-
Don't know	<1%	-	-	1%	-

There was a consistent lack of knowledge or care about how the typical electricity bill was split between transmission, distribution, generation and retail costs. Households were more concerned with the rising cost of electricity. As a result many were considering renewable energy options [such as solar PV] for monetary savings.

While there was some acknowledgement of the limited role SA Power Networks plays in affecting cost, the pressures felt by businesses as a result of perceived increases to electricity costs were becoming barriers to operation. This was particularly true for businesses competing in overseas markets where they were becoming less competitive as a result escalating electricity costs [amongst other fixed costs].

Some focus group participants perceived the electricity supply chain to be collectively responsible for rising costs. This, coupled with perceptions of rising electricity costs, resulted in a level of distrust of the organisations involved in supplying electricity to homes and businesses.

“Quarterly cost of the power, the power seems to be increasing all the time for a system that is completely unreliable.”

[Focus group: Port Lincoln]

“No one would be happy with half price power and only 90% supply.”

[Focus group: Small business]

“[Price] keeps going up and wages stay the same.”

[Focus group: Metro – North]

“They have you over a barrel, you have to pay it.”

[Focus group: Metro – South]

“Price rises don’t make sense to our clients – why electricity is so expensive compared to many other countries. So what does it mean? I don’t get paid more but I have to pay more for electricity each year that the price goes up?”

[Focus group: In-depth interview – stakeholder]

“If I’m going to survive, I need a bit of cost relief on network charges. What I’m paying now is too high. Network charges have remained static. This is a large cost burden – these are charges that we have to pass onto our customer. Along with the value of the Australian dollar, we are not competitive in Europe, Asia or America. We need to see the dollar down around 67c to be competitive overseas which is where a lot of our castings go.”

[In-depth interview – business]

“These businesses are in global supply chains. Europe doesn’t understand if reliability knocks out our computer system. No one gives you any leeway for having an issue with your power. It’s an extra thing that you have to factor into your business operations.”

[In-depth interview – business]

Important Topics for Households/Businesses [Survey]

7. How important are the following topics in terms of electricity to your home/business?
Please use a 0-10 scale, where 0 is 'of no importance to you', and 10 is 'extremely important'.

MEAN SCORE	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
The cost of electricity to my home/business	8.7	9.0	8.7	9.0	9.0	9.0	8.8	8.7	9.0	9.2
Not too many power outages*	8.6	8.6	8.2	8.8	8.4	8.6	8.6	8.4	8.6	8.7
Power outages don't last too long	8.3	8.5	8.3	8.6	8.5	8.6	8.5	8.3	8.6	8.7
I have confidence that I/we will have power	7.9	8.4	7.9	8.6	8.1	8.3	8.7	8.5	8.3	8.2
I have access to information about power outages	8.4	8.2	8.1	8.5	7.9	8.2	8.4	8.1	8.2	8.3

8. And from the above, which of these do you consider to be the most important?

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
The cost of electricity to my home/business	46%	57%	58%	50%	65%	60%	46%	54%	57%	60%
I have confidence that I/we will have power	21%	18%	18%	21%	16%	17%	26%	18%	19%	19%
Not too many power outages*	21%	11%	12%	15%	7%	12%	8%	12%	10%	10%
Power outages don't last too long	4%	10%	9%	12%	9%	9%	16%	11%	11%	10%
I have access to information about power outages	8%	3%	3%	3%	4%	3%	5%	5%	3%	2%

* 'Not too many power outages' was worded as 'Ensuring minimal power outages' for the business survey.

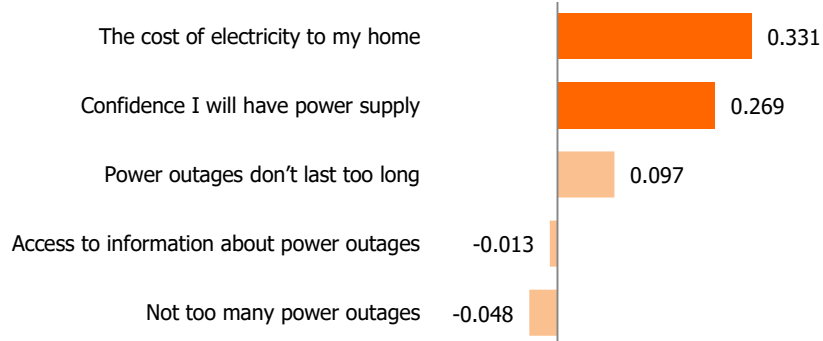
9. In terms of the electricity supply to your home, how would you rate the performance in the following areas?
Please use a 0-10 scale, where 0 is extremely poor, and 10 is extremely good.

MEAN SCORE	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	801	200	401	399	644	156	282	268	239
I have confidence that I will have power	6.3	6.6	6.7	6.6	6.5	6.4	7.2	6.8	6.6	6.5
Not too many power outages	6.4	6.5	6.6	6.6	6.5	6.5	6.6	6.5	6.3	6.7
Power outages don't last too long	6.2	6.4	6.5	6.3	6.4	6.4	6.4	6.3	6.2	6.5
I have access to information about power outages	6.3	6.4	6.2	6.4	6.5	6.5	6.1	6.5	6.4	6.1
The cost of electricity to my home	4.8	4.6	4.5	4.7	4.5	4.6	4.8	5.1	4.0	4.5

Compared to the Port Lincoln focus group, Renmark expressed higher confidence in having power.

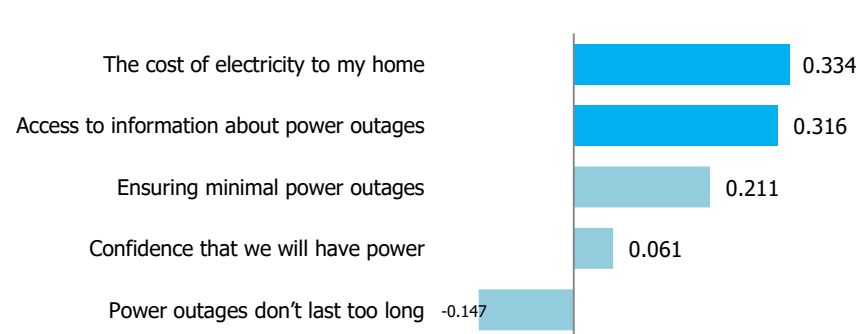
Drivers of satisfaction with electricity to home

[Linear regression analysis]*



Drivers of satisfaction with electricity to business

[Linear regression analysis]*



*Larger figures indicate more influence on 'Satisfaction with electricity'.

Highlighted bars indicate a relationship between satisfaction with electricity and the predictor statements that is not due to chance [$p < 0.05$].

Importance & Performance by Region [Survey]

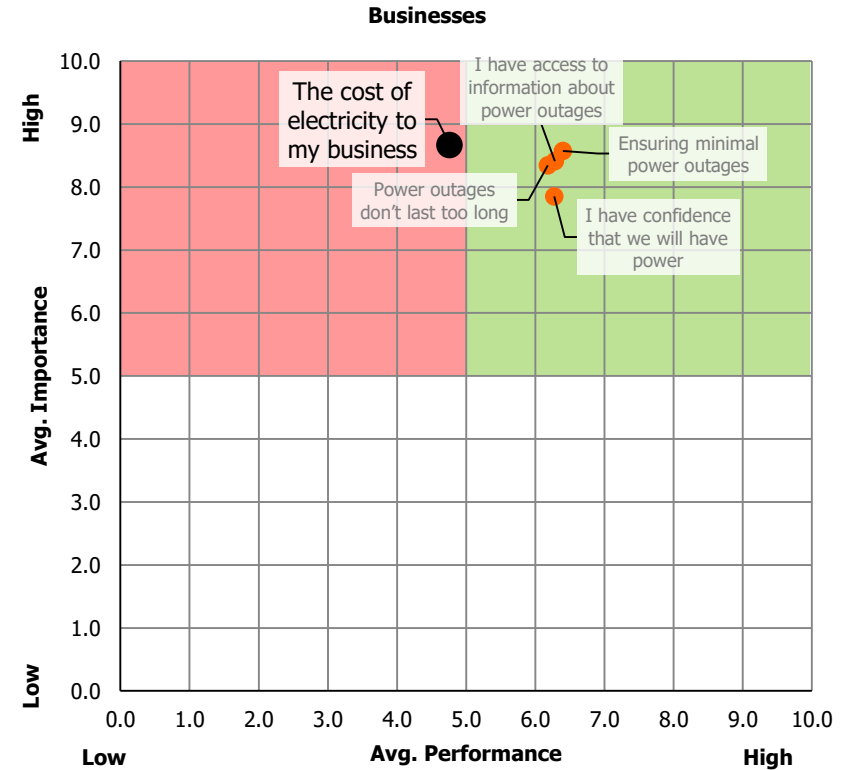
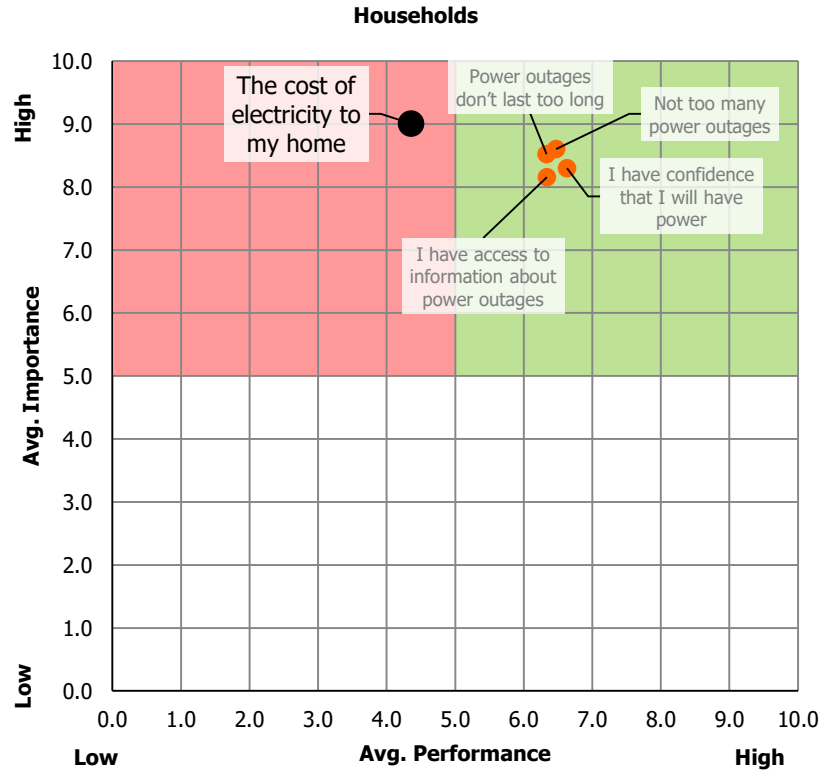
7. How important are the following topics in terms of electricity to your home/business?
Please use a 0-10 scale, where 0 is 'of no importance to you', and 10 is 'extremely important'.

MEAN SCORE	Household total	Metro – East and CBD	Metro – West	Metro – North	Metro – South	Adelaide Hills	Rural SA – Eyre Peninsula	Rural SA – Yorke Peninsula/ Flinders	Rural SA – Barossa Valley, Gawler and surrounds	Rural SA – Fleurieu / Kangaroo Island	Rural SA – Far north	Rural SA – Riverland	Rural SA – South East incl. Mt Gambier
Column n	805	361	150	60	59	58	15	14	13	15	10	16	18
The cost of electricity to my home	9.0	9.0	9.1	9.5	8.9	8.2	9.2	8.9	9.4	8.7	9.7	8.4	9.3
Not too many power outages	8.6	8.4	8.7	9.2	9.0	8.6	9.4	9.5	9.5	6.4	9.0	8.6	8.8
Power outages don't last too long	8.5	8.5	8.5	8.6	8.9	8.5	9.5	8.7	8.1	7.6	8.9	8.6	8.7
I have confidence that I will have power	8.4	8.3	8.2	8.7	8.2	8.5	9.6	9.0	9.6	7.0	9.4	8.6	9.0
I have access to information about power outages	8.4	8.0	8.3	8.8	8.4	8.8	8.9	8.9	8.9	6.1	9.4	8.0	9.0

9. In terms of the electricity supply to your home, how would you rate the performance in the following areas?
Please use a 0-10 scale, where 0 is extremely poor, and 10 is extremely good.

MEAN SCORE	Household total	Metro – East and CBD	Metro – West	Metro – North	Metro – South	Adelaide Hills	Rural SA – Eyre Peninsula	Rural SA – Yorke Peninsula/ Flinders	Rural SA – Barossa Valley, Gawler and surrounds	Rural SA – Fleurieu / Kangaroo Island	Rural SA – Far north	Rural SA – Riverland	Rural SA – South East incl. Mt Gambier
Column n	801	357	148	58	58	51	16	14	12	15	9	16	18
Confidence I will have power supply	6.6	6.4	6.3	6.3	7.3	6.6	6.7	7.4	8.9	8.0	5.4	6.3	7.1
Not too many power outages	6.5	6.2	6.8	6.8	7.8	6.2	7.1	6.3	7.4	7.2	4.8	6.6	6.3
Power outages don't last too long	6.4	6.2	6.7	6.3	6.4	6.0	6.1	6.0	7.6	6.2	4.8	6.4	6.9
Access to information about power outages	6.4	6.2	7.1	6.0	7.3	6.8	5.3	6.2	6.5	4.5	4.1	6.4	6.7
The cost of electricity to my home	4.6	4.4	5.1	3.4	5.2	5.0	3.2	3.8	6.3	5.1	2.7	3.9	4.7

Importance-Performance Matrix of Households [Survey]



While South Australian households rated each aspect of electricity supply to their house as highly important, performance in each area is poorer by comparison. Most notable is the cost of electricity, which sits below the midpoint of the scale [5].

Businesses indicate similar response patterns.

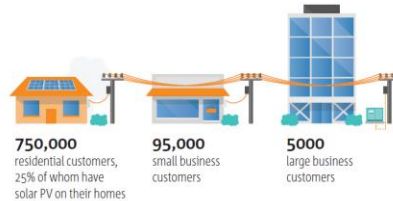
Understanding of SA Power Networks [Focus groups & interviews]

There was a reasonably high level understanding of the organisations involved in the South Australian electricity market overall, however the understandings of the responsibilities of each was limited and of less interest. Even after illustrating the differences, some participants still perceived the organisations at each stage of the supply chain as equally responsible for the cost on their bill – they did not necessarily care about the unique responsibilities beyond what they were doing overall to reduce the price on their bill. Some perceptions of SA Power Networks were that it was also responsible for utilities [i.e. power, water and gas]. Businesses acknowledged SA Power Networks' responsibilities, and perceived their role to be that of maintaining reliability and improving efficiencies across the network.

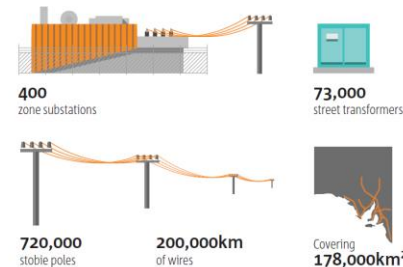
The electricity sector was perceived to be very different to a decade ago; that the sector is now privately owned with some foreign ownership. Some participants noted concern about the privatisation of South Australia's electricity, and that this created a vulnerability to South Australians in terms of cost and reliability. A few indicated a preference of the old public 'ETSA' system, with some still referring to them as the current provider. While they appreciated that private ownership is the new reality, they noted the need to make a profit, and other business drivers as likely conflicting with the requirements of South Australians.

The information presented to participants in relation to the South Australian electricity market was noted as easily understood and consistent with their current understanding of the network. SA Power Networks was well known across the focus groups, as a key stakeholder in the provision of electricity to South Australians, and there was good understanding of SA Power Networks' role in building and maintaining the poles, wires and substations [76% of households, from the survey].

As the distribution network manager, SA Power Networks builds and maintains the poles, wires and substations that deliver power reliably and safely to around 850,000 customers:



We operate and maintain a network of:



"Maintain the infrastructure that delivers it to your power meter. And a bit to do with the generation." [Small business]

"The ones we ring if we got a problem" | "The middle men; the power lines." [Renmark]

"They are the main ones, they do the power lines and everything." [Metro – South]

10. Have you heard of SA Power Networks before today?

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Yes	94%	82%	73%	83%	81%	82%	83%	82%	87%	80%
No	6%	15%	18%	15%	14%	14%	16%	17%	9%	14%
Don't know	-	4%	9%	2%	5%	4%	1%	2%	4%	6%

Businesses were more aware of SA Power Networks than households.

11. From the list to follow, which do you believe are the responsibility of SA Power Networks? [Of those that had heard of SA Power Networks]

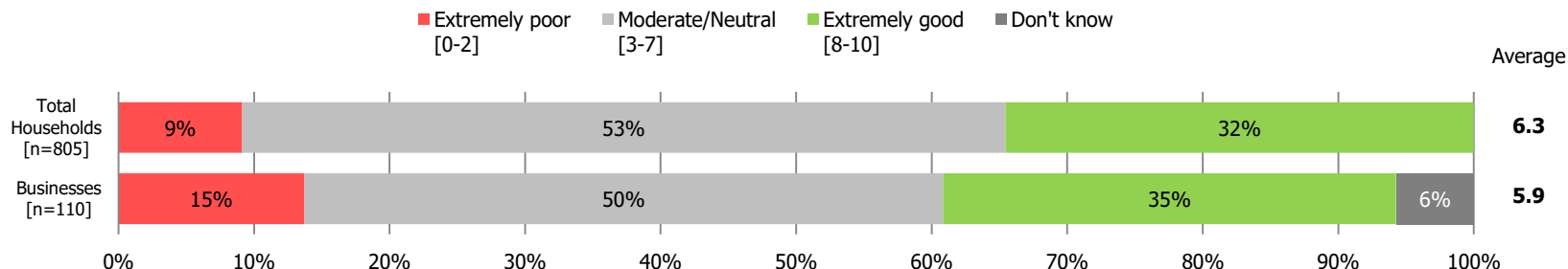
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Households	103	659	146	335	325	528	131	231	237	192
✓ Distributes electricity to customer households and businesses via a network of stobie poles	76%	74%	71%	76%	71%	75%	69%	66%	78%	78%
✗ Carries electricity long distances via large transmission towers	55%	52%	56%	46%	58%	53%	48%	60%	50%	46%
✗ Generates electricity	39%	35%	40%	31%	40%	37%	28%	40%	36%	30%
✗ Sends bills to households and businesses	12%	14%	18%	14%	15%	14%	15%	19%	10%	14%
Don't know	5%	8%	8%	8%	7%	7%	10%	7%	8%	9%

Survey participants were able to indicate more than one responsibility – while the majority of respondents indicated correctly their understanding of SA Power Networks' responsibilities, a large proportion also indicated incorrectly [i.e. mistaking the responsibility of ElectraNet for SA Power Networks].

12. Based on this information about the role of SA Power Networks, how well do you believe they are performing overall? [by region]
 Please use a 0-10 scale, where 0 is extremely poor, and 10 is extremely good.
 [Of those including a rating from 0-10]

	Households total	Metro – East and CBD	Metro – West	Metro – North	Metro – South	Adelaide Hills	Rural SA – Eyre Peninsula	Rural SA – Yorke Peninsula/ Flinders	Rural SA – Barossa Valley, Gawler and surrounds	Rural SA – Fleurieu / Kangaroo Island	Rural SA – Far north	Rural SA – Riverland	Rural SA – South East incl. Mt Gambier
Column n	756	357	141	59	59	58	15	13	13	15	9	14	17
Mean	6.3	6.0	6.2	6.3	7.4	6.8	5.7	6.4	6.4	7.7	4.3	6.2	6.6

How well do you believe SA Power Networks is performing overall?

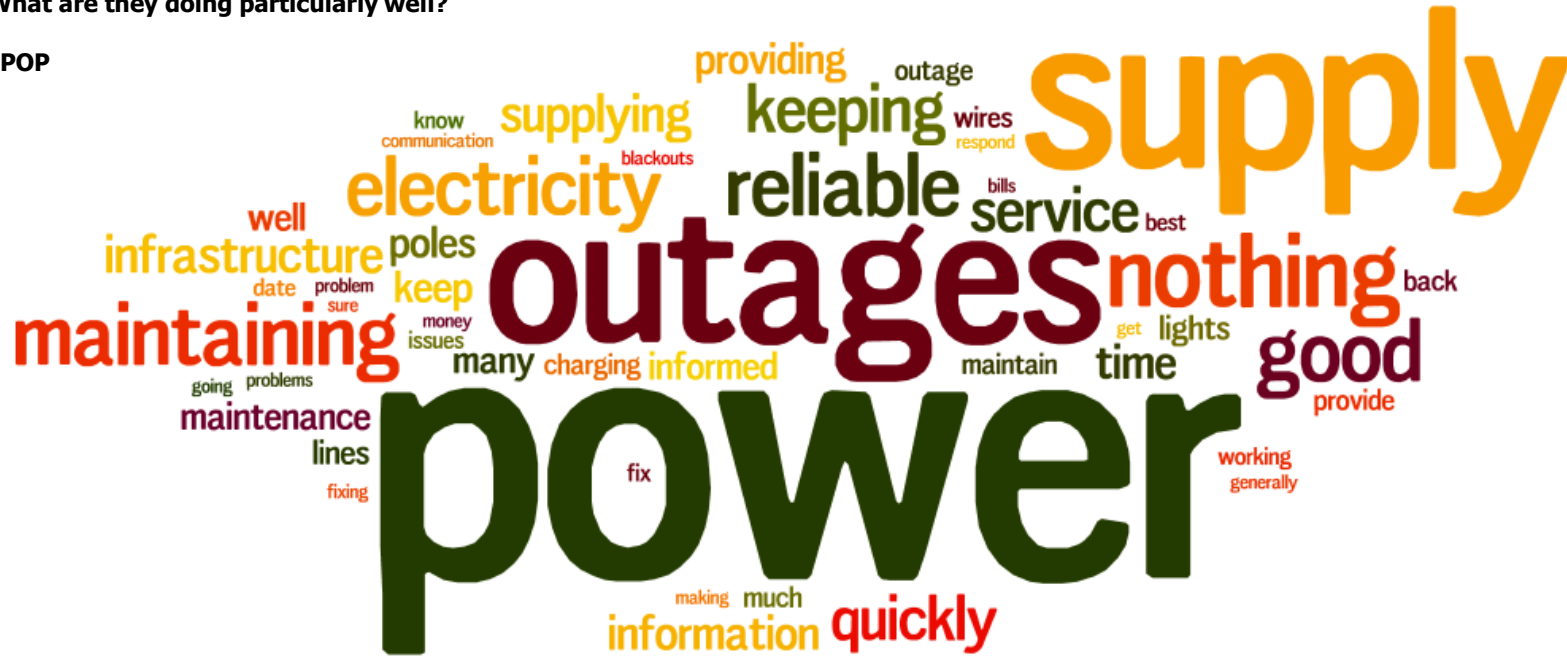


On average, the businesses surveyed rate SA Power Networks as performing more poorly [5.9] compared to households [6.3] despite a similar proportion of both indicating extremely good performance [35% and 32%, respectively, ratings of 8 – 10].

Regional differences exist; in particular Metropolitan South and Fleurieu Peninsula/Kangaroo Island rates performance of SA Power Networks more highly than other regions.

13. What are they doing particularly well?

GEN POP



"Working hard to supply us."

"When we had an outage we were kept informed and up to date with information."

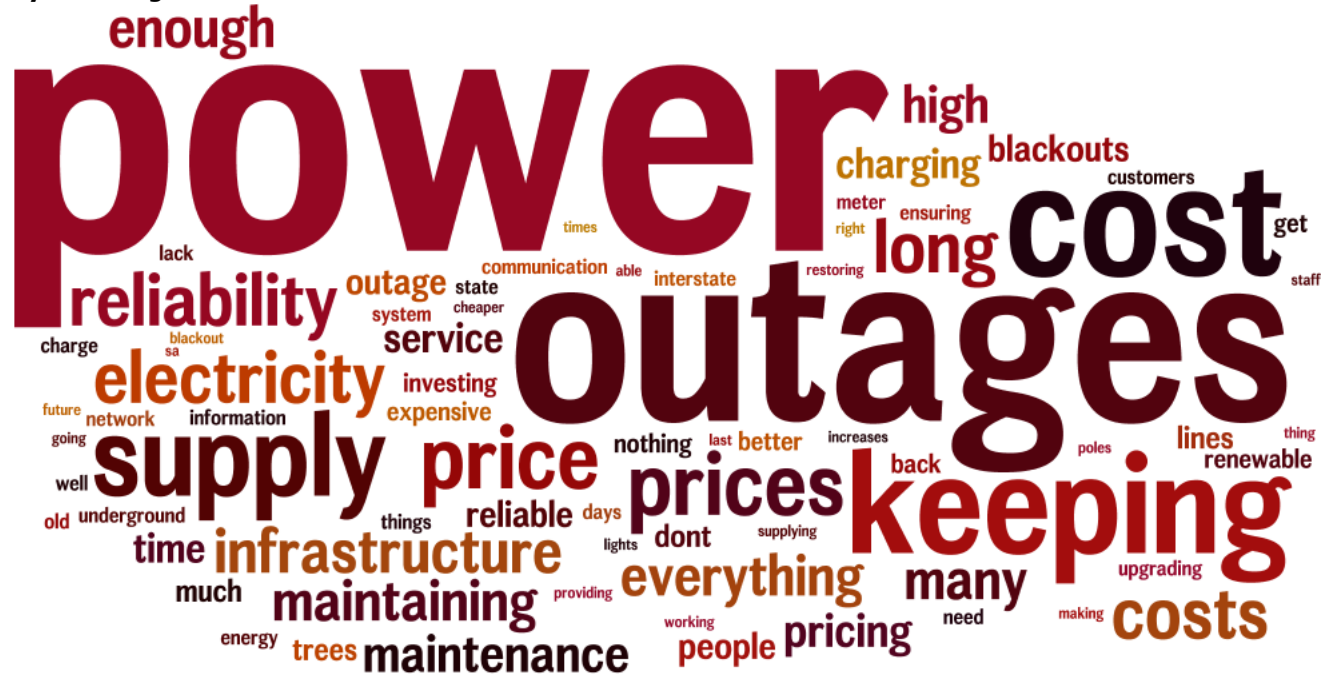
"When it's planned they do let us know."

"Support local communities."

"Supplying well."

"Supplying the power."

GEN POP



"Working together to improve network and renewable energy."

"Too expensive and lots of power outages."

"Solve the outages that are more common now."

"Load shedding."

Network Reliability

There is a perception that South Australia's electricity supply is unreliable, driven in part by media coverage and word-of-mouth discussions. This perception was based on the notion of, for example, one suburb being supplied while an adjacent suburb is without power. In reality, focus group participants generally indicated the supply of electricity to their *own* home as reliable. Participants more commonly indicated the reliability of *others* was perceived to be poor.

Many participants *have* experienced outages after the September 2016 State-wide outage, however there was typically a tolerance that outages will happen from time to time and are thought to be unavoidable – particularly as a result of a road accident or weather. Reflecting back over the past year or so, participants perceived that, by and large, outages were at a reasonable level and well-managed.

There were notable differences between the groups where significance of reliability was a major issue. Tolerance of poor network reliability is low for businesses, where even flickers can have significant implications on costs, staff time and machinery disruptions. Perceptions of poor reliability levels also exacerbated frustrations with cost, where despite increasing prices, reliability can still [at times] be unsatisfactory.

Discussions amongst the Adelaide Hills and Port Lincoln focus groups highlighted nervousness around reliability to their region where there is a perceived lack of electricity security and an expectation that outages will happen again soon. Many participants perceived the problems to be beyond reasonable levels and a result of incompetence. Participants from these focus groups, as well as Renmark, also expressed a need to become more self-reliant via generators or other methods.

There was support for the current policy of 'All customers across South Australia pay more in order to ensure that areas that are more challenging to supply are adequately supplied with reliable electricity, even with higher costs of servicing these areas [such as regional and remote South Australia]'. This was viewed as a fair and reasonable system and with only a few exceptions. Residents in more easily supplied areas were quite willing to pay more to "*compensate*" the supply of electricity to areas more difficult to supply. This was described as *postage stamp pricing*.

"It varies vastly depending on where you live."

[Focus group: Adelaide Hills]

"I think we can all accept an outage as a result of a storm but load shedding stinks."

[Focus group: Metro – South]

"For a household you can burn candles but for businesses it can be disastrous."

[Focus group: Metro – South]

"I've got torches, lanterns and candles in every room of the house ... this is how confident I am with Port Lincoln power I've got a torch on me right now."

[Focus group: Port Lincoln]

"Apart from the [State-wide] blackout I haven't had any issues regarding reliability."

[Focus group: Metro – North]

"It needs to be across the board every state, every town, pays the same amount."

[Focus group: Port Lincoln]

"You can have different layers of reliability standards but for a business, they don't care – just keep my lights on. They don't care that SA Power Networks or ElectraNet have a standard. That doesn't make any difference to them. It comes down to accountability."

[In-depth interview – business]

"Fairness means everybody can put their heater on when its freezing or put the air-con on when it's 40 degrees."

[In-depth interview – stakeholder]

15. How would you perceive the reliability of electricity supply to the following areas? [averages]
1 Extremely poor, 3 Neutral and 5 Excellent

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Metropolitan Adelaide	3.4	3.5	3.5	3.5	3.5	3.5	3.6	3.5	3.5	3.5
Outer Metropolitan [Adelaide Hills]	3.0	3.1	3.2	3.1	3.2	3.1	3.3	3.2	3.1	3.1
Regional South Australia	2.9	3.0	3.0	2.9	3.0	2.9	3.1	3.1	2.9	2.9

Overall, Metropolitan Adelaide is perceived to have higher reliability than outer or Regional SA.

15. How would you perceive the reliability of electricity supply to the following areas? [averages]
1 Extremely poor, 3 Neutral and 5 Excellent

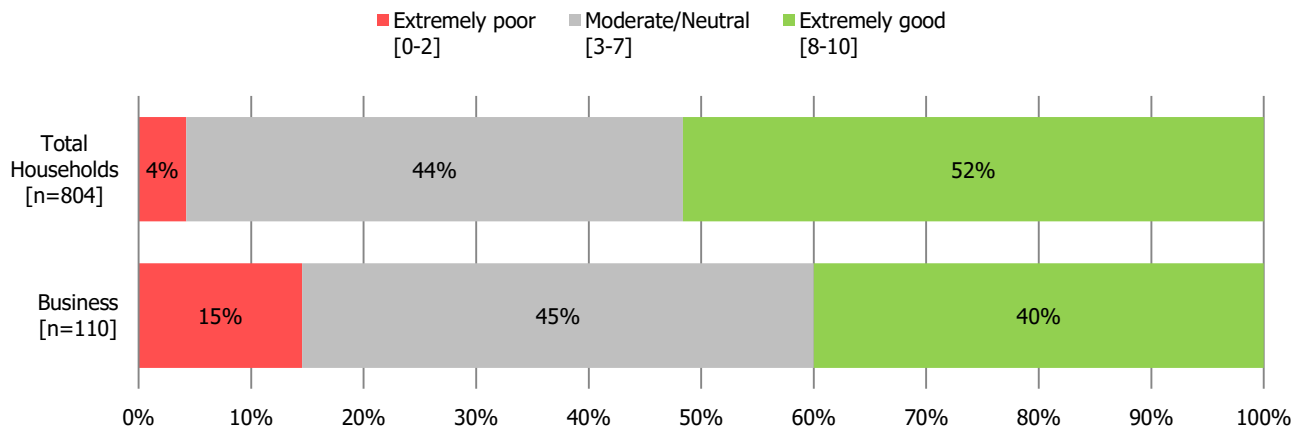
	Metro – East and CBD	Metro – West	Metro – North	Metro – South	Adelaide Hills	Rural SA – Eyre Peninsula	Rural SA – Yorke Peninsula/ Flinders	Rural SA – Barossa Valley, Gawler and surrounds	Rural SA – Fleurieu / Kangaroo Island	Rural SA – Far north	Rural SA – Riverland	Rural SA – South East incl. Mt Gambier
Column n	371	154	59	60	58	16	14	13	15	10	16	18
Metropolitan Adelaide	3.4	3.4	3.8	3.8	3.7	3.4	3.3	3.4	3.9	3.2	3.4	3.4
Outer Metropolitan [Adelaide Hills]	3.1	3.1	3.1	3.0	3.1	3.1	3.5	3.9	3.6	2.7	2.9	3.4
Regional South Australia	2.9	3.1	2.8	2.8	2.8	2.9	3.8	2.6	4.2	2.5	3.2	3.2

When examining regional differences, the perceived reliability of Metropolitan Adelaide is higher than that of regional South Australia in most instances.

16a. Overall, how would you rate the reliability of the electricity supply to your home/business?
Please use a 0-10 scale, where 0 is extremely poor, and 10 is extremely good.

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	804	200	402	402	647	158	283	272	238
Mean	6.4	7.0	7.3	7.0	7.0	7.0	7.2	6.8	6.9	7.5

16a. Overall, how would you rate the reliability of the electricity supply to your home/business?



More South Australian households rate the reliability of the electricity supply to their premises as extremely good compared to the businesses surveyed.

Businesses indicated a lower level of reliability than households.

Factors associated with reliability of supply [Survey]

In exploring perceptions of **reliability**, it is clear that confidence in having power is the primary driver for households and businesses – cost does not necessarily have much to do with perceptions of reliability of power supply. A high correlation between performance in 'confidence I will have a power supply' and how survey participants would rate reliability to their household/business was found. This suggests that confidence in having a power supply is strongly associated with how well a South Australian resident will rate reliability.

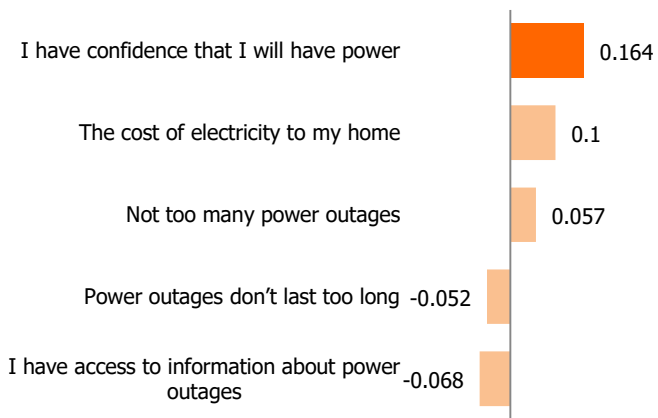
When considering the graphs below, larger figures indicate more influence on 'ratings of reliability'. Thus, the impact of 'confidence I will have power' is a strong driver for business.

Correlations between 'Ratings of reliability' and the listed factors below
[Pearson's correlation coefficient]^

	Total Households	Businesses
Confidence I will have power supply	0.69	0.80
Not too many power outages	0.68	0.78
Power outages don't last too long	0.62	0.69
Access to information about power outages	0.37	0.63
The cost of electricity to my home/business	0.33	0.54

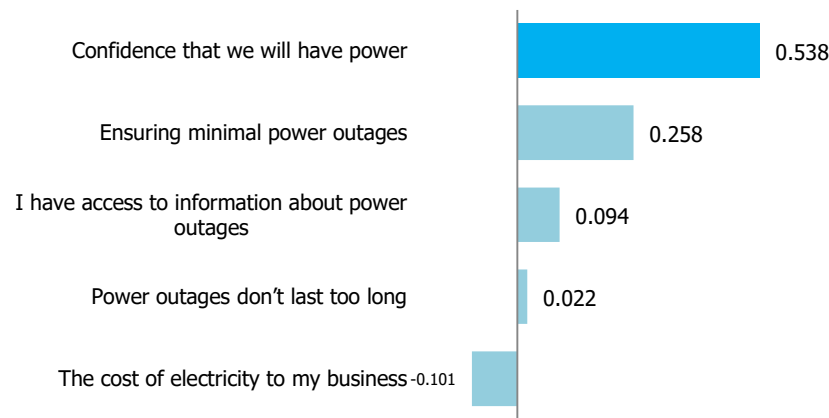
Drivers of perceptions of reliability of electricity supply

[Households – Linear regression analysis]*



Drivers of perceptions of reliability of electricity supply

[Businesses - Linear regression analysis]*



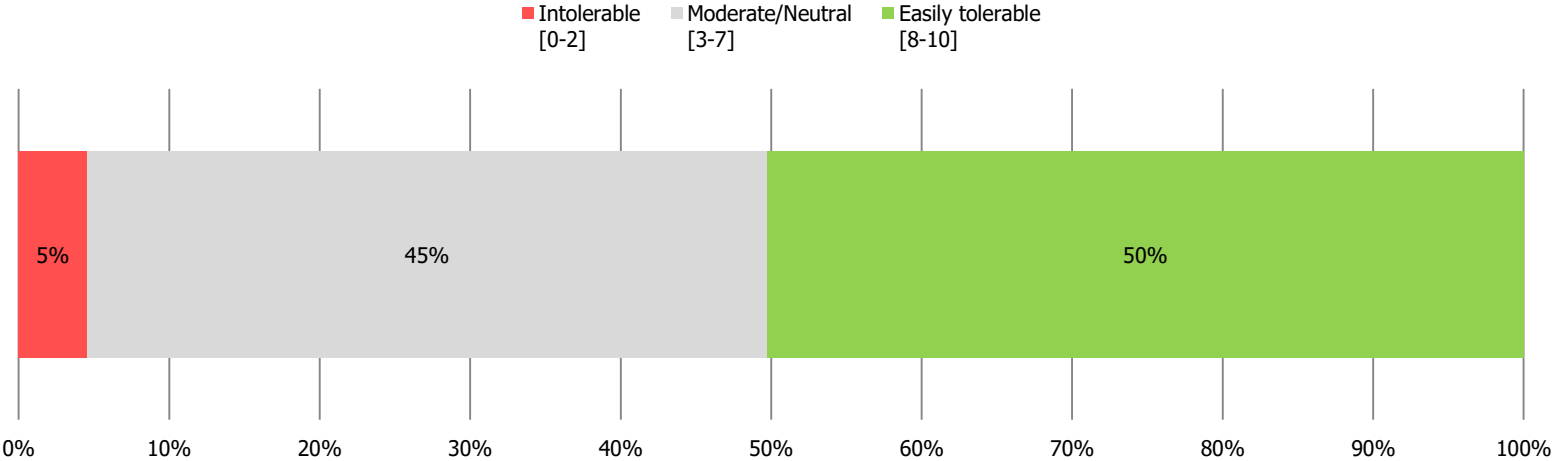
*Larger figures indicate more influence on 'Ratings of reliability'.

Highlighted bars indicate a statistically significant relationship between reliability ratings of power supply and the predictor statements [$p < 0.05$].

^Correlation coefficients have a range of -1 and +1. The closer to these limits, the stronger the relationship between the two tested variables. A positive value indicates that as one variable increases, so too does the correlated variable. A negative value indicates that as one variable increases, the other decreases

16b. Overall, how do you tolerate the level of reliability at your home? Please use a 0-10 scale, where 0 is intolerable, and 10 is easily tolerable.									
	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Mean	7.0	7.4	6.9	7.1	7.0	7.2	7.2	6.8	7.3

16b. Overall, how do you tolerate the level of reliability at your home?
[Households, n=805]



Half of South Australian households rate their tolerance to the level of reliability at their home as 'easily tolerable' [i.e. 8-10 out of 10]

16a. Overall, how would you rate the reliability of the electricity supply to your home/business? 16b. Overall, how do you tolerate the level of reliability at your home?													
	Households total	Metro – East and CBD	Metro – West	Metro – North	Metro – South	Adelaide Hills	Rural SA – Eyre Peninsula	Rural SA – Yorke Peninsula/Flinders	Rural SA – Barossa Valley, Gawler and surrounds	Rural SA – Fleurieu / Kangaroo Island	Rural SA – Far north	Rural SA – Riverland	Rural SA – South East incl. Mt Gambier
Column n	805	371	154	59	60	58	15	14	13	15	10	16	18
Average reliability	6.4	6.9	6.8	7.4	7.8	6.7	6.2	7.3	7.9	8.0	6.1	7.5	7.2
Average tolerance to reliability	7.0	7.0	6.7	7.4	7.8	6.9	6.7	7.0	8.0	8.1	6.2	7.6	6.9

Overall, perceptions of reliability and tolerance to reliability are positive – only a small proportion of households [4%] indicate extremely poor reliability.

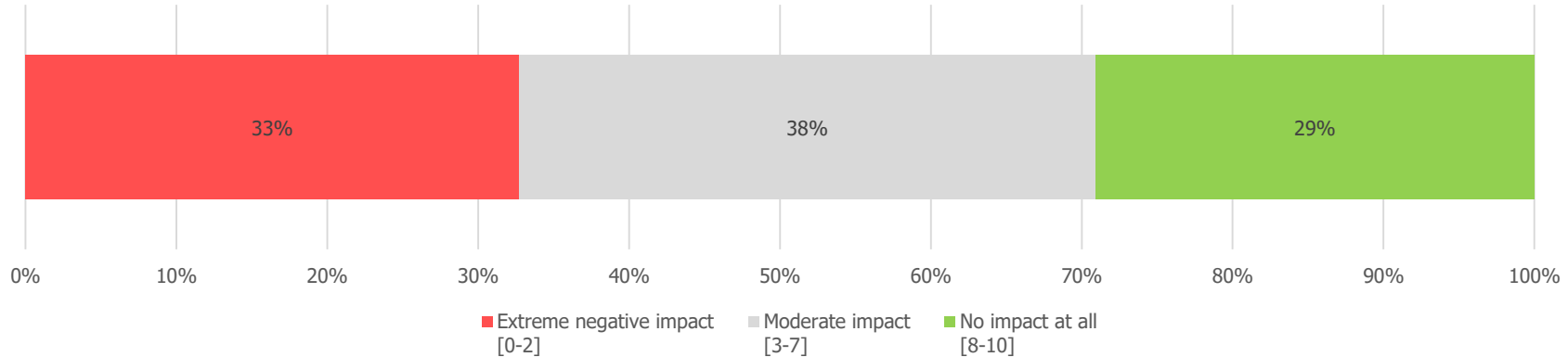
There is a strong correlation between reliability and tolerance to reliability [$r=0.83$, $p<0.05$], suggesting a distinct relationship between tolerance to reliability levels and perceived reliability.

Fleurieu/Kangaroo Island and Barossa Valley/Gawler areas rated reliability higher than those in other regions.

Impact of reliability on businesses [Business survey]

How does the reliability of the electricity supply impact on your ability to operate your business?

[0=Extreme negative impact, 10=no impact at all, n=110]



Note: 44% indicated 4 or below, highlighting almost half of businesses surveyed are negatively impacted by their reliability of electricity supply, with an average level of impact of 4.9 out of 10.

There was a good understanding of the concept of planned and unplanned power outages. With sufficient communication, group participants were generally tolerant of power outages. Weather and road accident-related outages were viewed as unavoidable, and while minimising these was considered a priority for some [e.g. through undergrounding electricity supply in new areas], there is a general acceptance of unplanned outages. Some noted a concern that if reliability was improved to reduce the number of unplanned outages, it may result in costs increasing above current levels.

Similarly, planned outages were also accepted, provided there were sufficient communications prior, and if necessary, during the outage. Communications from SA Power Networks were noted as a weakness and a point of concern for some people. For example, receiving notice [e.g. via a letter-box delivered notification] *after* a planned outage, receiving underestimated time-frames for outages, or unreliable information as to when power would be restored.

The main concern in relation to outages was load shedding. There was a very low level of understanding about load-shedding and widely reported as being a major source of concern and frustration. Many believed load shedding was unacceptable and unfair, with some areas never experiencing load shedding and others experiencing load shedding regularly. Unlike discussion around unplanned and planned outages [which were generally tolerated], many became quite angry discussing load shedding and refused to accept the need for it. Indifference was expressed that SA Power Networks and other stakeholders have little control.

“When my power goes out I don’t know if it’s planned, unplanned or load shedding.” [Focus group: Adelaide Hills]

“Most of the ones that are major are due to storms, other than that they get onto it pretty quickly.” [Focus group: Renmark]

“Three today at work for 5 minutes.” [Focus group: Port Lincoln]

“You’ve gotta accept the fact the weather and motor accidents are gonna happen.” [Focus group: Port Lincoln]

Tolerance of power outages [survey]

16d. How could SA Power Networks help make the level of reliability at your home more tolerable?
Businesses asked 'How could SA Power networks make the impact to your business more tolerable?'
 [Of those that rated 5 or below for tolerability]

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	58	164	34	91	73	133	31	42	64	46
More reliable supply	72%	79%	67%	83%	74%	81%	70%	75%	74%	84%
Warning of power outages	48%	48%	32%	54%	41%	49%	46%	49%	37%	50%
Communication during an outage	45%	38%	40%	38%	39%	35%	52%	37%	38%	50%
Education about what to do in an outage	16%	17%	17%	23%	9%	14%	29%	12%	18%	24%
Other	3%	18%	33%	23%	11%	12%	40%	20%	21%	15%

17. Thinking about electricity outages experienced in your home/business, when was the most recent outage?

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
This year	36%	48%	42%	53%	44%	47%	55%	41%	58%	44%
Last few months of 2016	30%	34%	32%	36%	32%	33%	40%	37%	29%	38%
Mid 2016	20%	7%	8%	5%	9%	7%	5%	8%	5%	8%
Early 2016 or before	6%	1%	1%	<1%	2%	1%	<1%	1%	1%	1%
Don't know	7%	10%	16%	6%	13%	12%	1%	13%	7%	9%

18. On this most recent outage, how long was your household /business without power?

	Businesses		Total Households	
Column n	101	Average time	727	Average time
Less than an hour	31%		10%	
[specify] hours	49%	7.21 hrs	74%	7.33 hrs
[specify] days	9%	1.89 days	10%	2.26 days
Don't know	12%		6%	

19. Do you believe this outage was ...

[Of those that indicated 'Less than an hour' or specified the period of time]

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	101	727	168	379	349	571	157	245	253	217
Planned [ie, for maintenance on the network]	13%	13%	12%	11%	15%	13%	11%	18%	10%	11%
Unplanned [ie, caused by weather or another type of fault]	76%	73%	73%	75%	71%	71%	79%	73%	75%	74%
Don't know	11%	14%	14%	14%	15%	15%	10%	9%	15%	14%

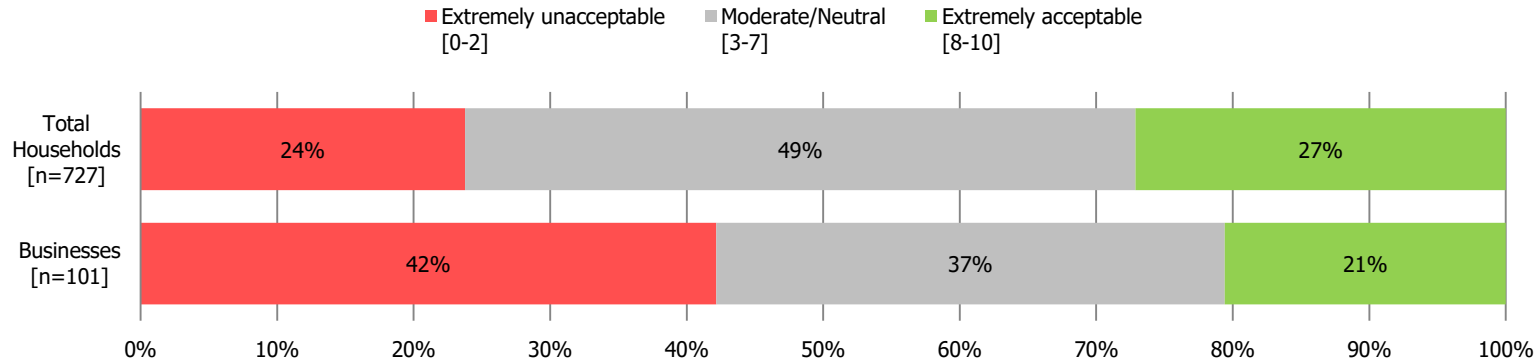
Of the households that experienced an outage in 2017 [48%], 60% believed it to be unplanned.

Acceptability of most recent outages [Survey]

20. How acceptable was the duration of this most recent outage?
Please use a 0-10 scale, where 0 is extremely poor, and 10 is extremely good.
[Of those that could recall an outage]

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	101	727	168	379	349	571	157	245	253	217
Mean	4.1	5.2	5.1	5.4	5.0	4.9	6.4	5.9	5.0	4.9

20. How acceptable was the duration of the most recent outage?



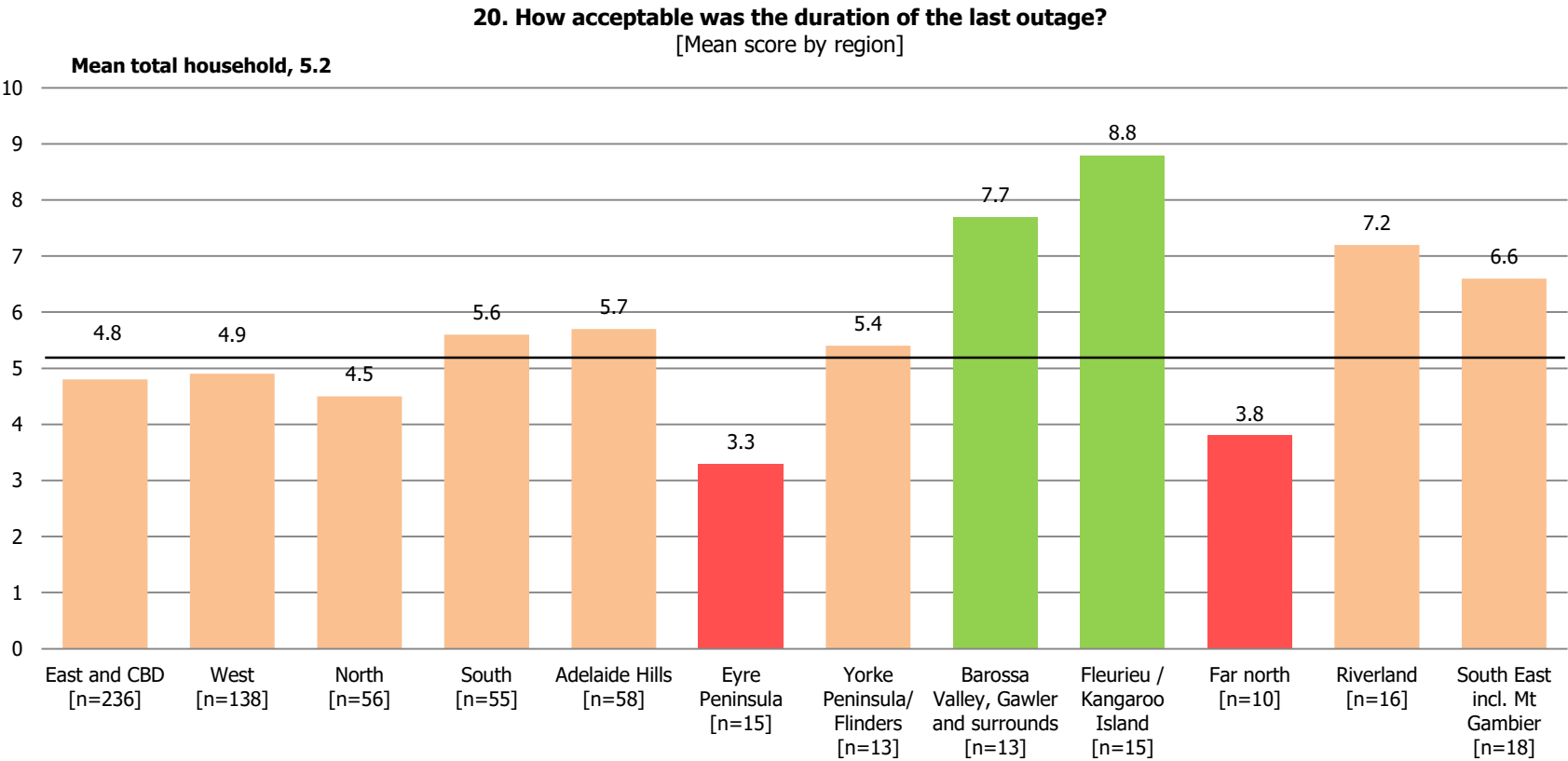
The duration of the most recently-experienced outage was least acceptable to businesses, with 42% indicating it was extremely unacceptable [rating of 0-2].

Interestingly, regional households rated the duration of their most recent outage as more acceptable than the other segments.

Acceptability of most recent outages by Region [Survey]

Fleurieu Peninsula/Kangaroo Island indicated the duration of the last outage they experienced was most acceptable, compared to the average ratings of other regions.

Inversely, Eyre Peninsula indicated the duration of their last outage was least acceptable.



Reasons for sentiments towards recent outage [Survey]

21. Why was the duration acceptable?

[Of those that indicated 6 or above when rating acceptability of most recent outage]

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	38	353	76	199	154	252	101	133	119	101
Duration was tolerable	47%	71%	68%	83%	55%	67%	82%	69%	65%	81%
I was kept informed	29%	37%	30%	34%	40%	37%	36%	47%	33%	28%
SA Power Networks restored power when they told me they would	39%	27%	29%	25%	30%	29%	22%	27%	28%	26%
Other	5%	14%	12%	15%	12%	14%	14%	10%	20%	12%
Don't know	8%	4%	9%	1%	8%	5%	1%	6%	4%	1%

Duration and communication are the strong factors affecting acceptability of recent outages.

22. Why was the duration unacceptable?

[Of those that indicated 5 or below when rating acceptability of most recent outage]

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	64	374	91	179	195	319	55	112	134	116
Operational costs [staff, etc]	55%	-	-	-	-	-	-	-	-	-
Inconvenience /spoilage of food	56%	50%	54%	50%	49%	48%	56%	50%	50%	54%
Duration was intolerable	45%	46%	38%	53%	40%	45%	53%	51%	49%	42%
I wasn't kept informed	34%	35%	29%	36%	35%	37%	27%	28%	38%	33%
Other	8%	17%	18%	24%	11%	15%	30%	21%	17%	16%
SAPN didn't restore power when they told me they would	20%	16%	14%	14%	17%	14%	22%	13%	19%	15%
Don't know	<1%	4%	9%	1%	7%	5%	<1%	2%	6%	5%

Reasons for sentiments towards recent outage [Survey]

- ▶ "You can't control nature."
- ▶ "Freak storm."
- ▶ "It was out of their hands and they did their best to fix it."
- ▶ "It was major state wide so I knew it would take a while."
- ▶ "Rapid repair given the weather conditions."
- ▶ "Safety reasons."
- ▶ "Out of their hands."
- ▶ "Not their fault."
- ▶ "We should have reliable supply."
- ▶ "Too bloody often!"
- ▶ "It affected businesses."

Acceptance of causes for outages [Survey]

Q23. Thinking about unplanned outages [e.g., those caused by weather events or another fault on the network], how acceptable are the following outages on a scale of 0 to 10?

MEAN SCORE	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	804	200	402	402	647	157	283	271	239
Other fault on the network [e.g. a car crashed]	5.8	6.8	6.8	7.3	6.4	6.6	8.0	6.9	7.0	6.9
Flicker [a momentary outage]	5.5	6.6	6.7	6.8	6.4	6.4	7.3	6.7	6.6	6.6
Storm related outage	5.1	6.3	6.5	6.6	6.0	6.0	7.3	6.3	6.4	6.3
Heat wave related outage	3.9	4.6	4.8	4.6	4.5	4.3	5.5	4.9	4.4	4.5
Load shedding	3.2	4.0	4.2	4.1	3.9	3.8	4.5	4.6	3.8	3.6

Q24. Thinking about planned outages [e.g., scheduled maintenance or network upgrades], how acceptable are the following outages on a scale of 0 to 10?

MEAN SCORE	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	804	200	402	402	647	157	283	271	239
Upgrades or maintenance	5.7	6.9	7.0	7.3	6.5	6.6	8.0	7.0	6.9	7.0
New connection	5.3	6.6	6.8	6.9	6.3	6.3	7.7	6.6	6.6	6.8
Connecting renewables to the network [i.e. Solar PV]	5.3	6.6	6.7	6.8	6.3	6.3	7.7	6.6	6.6	6.8
Planned outages in general	5.0	6.4	6.5	6.9	6.0	6.1	7.8	6.6	6.5	6.3

Customer Communications

Focus group participants were of the opinion that they have little need or want for communications from SA Power Networks other than in relation to power outages. In exploring planned and unplanned outages, notable preferences were found:

- ▶ For **unplanned** outages, participants wanted **quick and easy to access** confirmation that there is an outage and when power supply is likely to return.
- ▶ For **planned** outages, participants wanted early warning as to the precise day and time when an outage will occur and the likely duration to allow them to plan ahead. This is particularly critical for businesses, as the cost of outages can be significant.

There were other opportunities for enhanced communications from SA Power Networks identified across the focus groups – for example, education about how to reduce electricity costs or easy ways to report a fault. However, most group participants noted they did not wish to communicate with SA Power Networks any more than was necessary. Information about **power outages** is critical and needed in a timely and accurate manner.

In terms of communication channels in relation to outages, SMS and the SA Power Networks website were noted as the preferred means and the most commonly used. An interesting finding was the level of inconsistency across focus groups regarding the level of awareness and current usage of communications channels. There was a clear need for promotion of SMS notifications – this was widely supported. So too was the availability of the website and apps for mobile devices, particularly the ability to check current outages and planned restorations to electricity supply.

In the case of an emergency, SMS, the website and wider communications via mass media such as radio was suggested. Critical in any communications is that it is trusted. This is a gap for some. Trust levels are not at a good level, and the ability for SA Power Networks to illustrate that they sincerely care about the situation and are providing reliable updates is both demanded and will be of value in building trust levels moving forward.

“I find their notification very good.” [Focus group: Metro – North]

“Letting households know when it is gonna happen.” [Focus group: Port Lincoln]

“Most days you just ring the phone number they supply, they tell you roughly when it’s gonna be back on, half the time it’s on early.”

[Focus group: Renmark]

“They have that app.” [A Focus group: Adelaide Hills]

25. In what situation would you expect SA Power Network to contact you/your business?

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Prior to a planned outage	74%	85%	82%	98%	71%	81%	100%	76%	90%	89%
During an unplanned outage	44%	56%	53%	66%	46%	55%	59%	49%	59%	58%
When trimming trees around power lines near me	<1%	51%	51%	63%	40%	49%	60%	46%	49%	58%
During and after a planned outage	45%	50%	49%	53%	46%	49%	51%	43%	52%	53%
When connecting a new power supply near me	40%	46%	48%	54%	38%	44%	56%	41%	49%	51%
Information about SAPN's operations and plans	<1%	44%	49%	55%	33%	42%	52%	45%	36%	50%
After a unplanned outage	29%	40%	43%	47%	34%	39%	47%	38%	40%	41%
When reading my meter	22%	23%	26%	24%	21%	23%	23%	22%	24%	23%
Other	2%	2%	1%	2%	1%	2%	3%	1%	3%	2%
Don't know	5%	5%	9%	1%	8%	6%	-	8%	2%	3%

South Australian businesses and households have a clear expectation of SA Power Networks to contact them **prior** to a planned outage, most typically via SMS.

26. How would you prefer SA Power Networks to contact you in the following situations?

Prior to a planned outage [Businesses responded to 'Before a planned outage']										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	44%	52%	38%	59%	46%	49%	63%	57%	58%	43%
Item in your letterbox	26%	34%	39%	34%	34%	35%	29%	29%	32%	39%
Email	45%	23%	21%	14%	33%	24%	19%	24%	23%	25%
Phone	16%	15%	17%	20%	10%	12%	29%	17%	10%	19%
Phone App	22%	7%	5%	4%	10%	7%	7%	8%	9%	5%
Social media	10%	7%	7%	4%	10%	7%	8%	11%	4%	6%
Website	17%	6%	7%	2%	10%	7%	1%	7%	8%	3%
Media such as radio	7%	6%	7%	3%	8%	6%	2%	3%	5%	9%
Other	<1%	<1%	1%	<1%	1%	<1%	<1%	1%	1%	-
Don't know	4%	3%	6%	1%	4%	3%	-	5%	2%	2%

During and after a planned outage										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	43%	49%	38%	52%	46%	47%	58%	52%	55%	42%
Email	38%	16%	16%	8%	25%	19%	6%	15%	20%	15%
Phone	18%	14%	19%	16%	11%	12%	21%	15%	9%	19%
Item in your letterbox	12%	12%	17%	9%	14%	13%	5%	6%	13%	17%
Phone App	16%	7%	3%	4%	11%	8%	6%	10%	9%	3%
Media such as radio	8%	7%	7%	4%	11%	8%	6%	7%	6%	9%
Social media	10%	7%	5%	5%	9%	7%	7%	12%	3%	5%
Website	17%	6%	6%	3%	9%	7%	1%	7%	8%	3%
Other	<1%	1%	3%	1%	1%	1%	1%	1%	1%	2%
Don't know	5%	15%	16%	23%	8%	14%	21%	16%	14%	12%

26. How would you prefer SA Power Networks to contact you in the following situations?

During an unplanned outage										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	45%	54%	42%	59%	48%	52%	61%	58%	58%	45%
Phone	20%	16%	18%	20%	12%	14%	22%	15%	10%	19%
Email	32%	12%	14%	6%	19%	14%	7%	9%	16%	12%
Media such as radio	15%	11%	8%	6%	16%	13%	6%	10%	11%	13%
Social media	15%	9%	6%	6%	13%	9%	10%	17%	6%	4%
Website	19%	7%	4%	2%	11%	8%	2%	8%	8%	3%
Phone App	20%	7%	4%	4%	10%	7%	6%	9%	10%	3%
Item in your letterbox	9%	7%	11%	5%	9%	7%	7%	6%	6%	9%
Other	2%	2%	3%	1%	2%	2%	1%	2%	2%	1%
Don't know	3%	11%	15%	14%	7%	9%	19%	12%	9%	11%

After an unplanned outage										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	38%	45%	34%	48%	42%	43%	53%	48%	52%	36%
Email	40%	13%	15%	5%	22%	15%	5%	10%	17%	14%
Phone	15%	11%	17%	13%	10%	13%	6%	5%	9%	18%
Item in your letterbox	10%	10%	14%	5%	14%	11%	5%	8%	7%	15%
Media such as radio	12%	8%	7%	6%	11%	9%	6%	7%	8%	11%
Social media	15%	7%	6%	4%	9%	6%	8%	12%	4%	4%
Website	16%	6%	5%	2%	9%	7%	2%	6%	9%	3%
Phone App	15%	6%	4%	4%	9%	6%	6%	7%	9%	2%
Other	1%	1%	3%	1%	1%	1%	1%	1%	2%	2%
Don't know	5%	18%	18%	27%	10%	15%	34%	25%	16%	14%

26. How would you prefer SA Power Networks to contact you in the following situations?

When trimming trees around power lines near me										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	N/A	805	200	403	402	647	158	283	272	239
SMS	-	36%	30%	36%	36%	36%	36%	36%	42%	30%
Item in your letterbox	-	36%	34%	36%	35%	38%	27%	35%	32%	39%
Email	-	16%	12%	8%	24%	19%	5%	16%	19%	12%
Phone	-	8%	11%	6%	9%	9%	3%	5%	6%	12%
Website	-	5%	6%	1%	10%	6%	1%	7%	6%	2%
Phone App	-	4%	4%	1%	6%	4%	2%	5%	5%	1%
Media such as radio	-	3%	4%	1%	5%	3%	1%	2%	2%	4%
Social media	-	2%	4%	1%	4%	3%	1%	2%	2%	3%
Other	-	2%	1%	2%	1%	1%	5%	<1%	3%	2%
Don't know	-	16%	18%	24%	8%	13%	32%	20%	15%	15%

When connecting a new power supply near me										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	33%	36%	30%	40%	31%	34%	42%	33%	43%	31%
Item in your letterbox	25%	29%	30%	30%	27%	31%	18%	27%	25%	37%
Email	39%	17%	16%	8%	27%	20%	5%	18%	18%	16%
Phone	16%	9%	12%	11%	8%	8%	14%	10%	6%	13%
Website	13%	4%	4%	1%	7%	5%	1%	5%	5%	2%
Phone App	13%	4%	4%	1%	7%	5%	2%	7%	5%	1%
Media such as radio	5%	3%	4%	1%	5%	3%	1%	2%	2%	3%
Social media	2%	3%	5%	<1%	5%	3%	1%	4%	1%	4%
Other	1%	2%	2%	3%	1%	2%	3%	1%	2%	3%
Don't know	6%	18%	17%	22%	15%	17%	25%	19%	19%	13%

26. How would you prefer SA Power Networks to contact you in the following situations?

Information about SA Power Networks' operations and plans										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	26%	27%	25%	27%	27%	27%	27%	28%	31%	22%
Item in your letterbox	16%	27%	33%	29%	25%	29%	21%	26%	22%	36%
Email	47%	21%	20%	10%	32%	23%	11%	17%	25%	22%
Website	24%	10%	8%	6%	14%	11%	5%	12%	13%	6%
Phone	12%	8%	10%	9%	8%	7%	13%	9%	6%	10%
Media such as radio	13%	6%	8%	2%	10%	8%	<1%	4%	7%	8%
Phone App	18%	5%	2%	1%	8%	5%	2%	8%	4%	1%
Social media	11%	3%	4%	1%	6%	4%	<1%	4%	2%	4%
Other	2%	2%	2%	2%	2%	2%	2%	1%	3%	2%
Don't know	5%	16%	14%	23%	9%	14%	27%	17%	16%	11%

When reading my meter										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
SMS	37%	31%	25%	27%	35%	32%	27%	33%	38%	22%
Item in your letterbox	15%	14%	18%	9%	19%	16%	5%	13%	11%	20%
Email	38%	13%	14%	3%	22%	15%	4%	13%	15%	11%
Phone	7%	5%	7%	5%	5%	5%	6%	5%	5%	6%
Phone App	14%	4%	2%	1%	6%	4%	1%	6%	4%	1%
Website	6%	2%	1%	<1%	3%	2%	-	3%	2%	<1%
Media such as radio	4%	1%	1%	-	3%	2%	-	3%	1%	-
Social media	6%	1%	2%	-	2%	1%	-	2%	<1%	2%
Other	5%	5%	7%	6%	3%	4%	5%	1%	5%	9%
Don't know	10%	38%	33%	53%	22%	33%	58%	38%	33%	39%

27. Thinking now about if you need to contact SA Power Networks, how would you prefer to communicate in the following situations?

Reporting an outage										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	30%	65%	67%	79%	50%	61%	81%	52%	62%	81%
Website	29%	20%	11%	16%	24%	20%	20%	33%	19%	7%
SMS	30%	14%	14%	10%	18%	15%	9%	17%	17%	8%
Email	28%	11%	12%	3%	20%	14%	1%	9%	15%	10%
Phone App	21%	8%	4%	5%	12%	9%	6%	15%	7%	1%
Social media	7%	3%	2%	1%	5%	3%	3%	5%	1%	3%
Other	2%	<1%	<1%	-	<1%	<1%	-	-	1%	-
No need to contact	3%	1%	1%	1%	1%	1%	1%	1%	2%	2%
Don't know	2%	4%	7%	2%	5%	4%	<1%	7%	2%	2%

Checking on a planned outage										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	30%	46%	50%	60%	31%	42%	61%	32%	43%	63%
Website	31%	30%	17%	27%	33%	31%	25%	39%	32%	18%
SMS	29%	13%	11%	10%	15%	13%	10%	15%	16%	7%
Email	25%	11%	11%	3%	20%	14%	1%	8%	15%	11%
Phone App	16%	9%	6%	6%	12%	8%	12%	15%	10%	2%
Social media	9%	6%	3%	3%	8%	6%	4%	11%	4%	3%
Other	5%	1%	1%	<1%	1%	1%	-	1%	1%	-
No need to contact	2%	3%	6%	3%	4%	4%	2%	1%	2%	8%
Don't know	2%	4%	8%	2%	6%	5%	1%	8%	2%	2%

***Of note is how preference to communicate with SA Power Networks is related to age.
Preference to use phone increases with age, while preference to use the website decreases.**

27. Thinking now about if you need to contact SA Power Networks, how would you prefer to communicate in the following situations?

Checking on an unplanned outage										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	25%	49%	56%	62%	36%	46%	63%	33%	46%	70%
Website	33%	29%	14%	26%	32%	30%	25%	39%	30%	18%
SMS	28%	14%	12%	10%	18%	15%	8%	14%	19%	7%
Email	26%	11%	13%	2%	19%	13%	<1%	10%	12%	9%
Phone App	20%	9%	4%	6%	11%	8%	12%	13%	10%	2%
Social media	9%	6%	3%	3%	8%	6%	4%	12%	3%	1%
Other	2%	1%	1%	<1%	3%	2%	-	3%	1%	<1%
No need to contact	4%	2%	3%	2%	1%	2%	2%	<1%	1%	4%
Don't know	2%	5%	8%	2%	7%	6%	1%	8%	3%	3%

Reporting a faulty street light										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	-	57%	61%	71%	43%	56%	62%	41%	53%	78%
Website	-	24%	12%	18%	29%	24%	23%	32%	26%	13%
Email	-	13%	13%	4%	22%	15%	3%	12%	16%	11%
SMS	-	9%	10%	5%	13%	10%	4%	10%	12%	6%
Phone App	-	6%	4%	3%	9%	6%	6%	10%	8%	1%
Social media	-	2%	2%	<1%	4%	2%	1%	4%	1%	<1%
Other	-	1%	<1%	-	1%	1%	-	1%	<1%	-
No need to contact	-	4%	5%	4%	4%	3%	7%	4%	4%	5%
Don't know	-	4%	6%	2%	6%	5%	2%	8%	2%	1%

***Of note is how preference to communicate with SA Power Networks is related to age.
Preference to use phone increases with age, while preference to use the website decreases.**

27. Thinking now about if you need to contact SA Power Networks, how would you prefer to communicate in the following situations?

Connecting my electricity supply										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	37%	65%	64%	79%	52%	61%	84%	56%	66%	79%
Website	15%	15%	9%	9%	21%	16%	10%	23%	15%	7%
Email	34%	15%	18%	3%	26%	17%	3%	12%	18%	14%
SMS	28%	11%	9%	5%	17%	12%	3%	10%	15%	7%
Phone App	13%	5%	4%	3%	6%	5%	3%	8%	5%	1%
Social media	5%	2%	1%	<1%	3%	2%	1%	4%	1%	-
Other	1%	1%	1%	1%	1%	1%	-	1%	1%	<1%
No need to contact	4%	4%	4%	6%	2%	4%	3%	1%	3%	4%
Don't know	3%	4%	7%	2%	6%	4%	2%	7%	3%	2%

Information about future electricity supply options to my home/business										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	21%	44%	50%	55%	33%	41%	58%	37%	40%	60%
Website	24%	24%	14%	19%	30%	25%	20%	33%	27%	12%
Email	38%	20%	19%	11%	30%	22%	12%	14%	29%	18%
SMS	23%	8%	7%	4%	12%	9%	3%	8%	10%	6%
Phone App	18%	5%	5%	2%	8%	5%	3%	10%	4%	1%
Social media	6%	4%	3%	1%	6%	4%	1%	5%	3%	3%
Other	5%	2%	4%	3%	1%	2%	2%	1%	2%	5%
No need to contact	5%	6%	5%	9%	3%	6%	4%	3%	3%	7%
Don't know	2%	5%	9%	3%	7%	5%	3%	8%	4%	3%

***Of note is how preference to communicate with SA Power Networks is related to age.
Preference to use phone increases with age, while preference to use the website decreases.**

27. Thinking now about if you need to contact SA Power Networks, how would you prefer to communicate in the following situations?

Making another enquiry										
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	805	200	403	402	647	158	283	272	239
Phone	42%	63%	60%	78%	48%	60%	76%	53%	62%	75%
Website	21%	18%	11%	14%	23%	19%	17%	25%	22%	8%
Email	36%	17%	18%	5%	29%	20%	6%	16%	21%	14%
SMS	23%	7%	5%	4%	10%	8%	3%	9%	9%	4%
Phone App	12%	4%	3%	2%	6%	4%	3%	6%	4%	1%
Social media	1%	2%	2%	-	4%	2%	-	5%	1%	-
Other	2%	2%	2%	1%	2%	2%	2%	3%	1%	2%
No need to contact	4%	2%	4%	2%	2%	2%	3%	<1%	2%	4%
Don't know	2%	4%	9%	2%	5%	4%	2%	6%	3%	3%

Payments for Not Meeting Standards

Guaranteed Service Level [GSL] Scheme [Focus groups]

There was only limited awareness of the Guaranteed Service Level [GSL] Scheme across the focus groups. A small number of participants had some recall, and a few had received a payment, however there was a high level of uncertainty. In saying this, there was a general view that such a scheme was fair and reasonable to have in place.

General feedback was that the Scheme was one of 'compensation'. Some participants understood it to be a penalty to SA Power Networks for underperforming which thereby incentivised SA Power Networks to do their best to minimise the need to pay.

Much conversation surrounded the GSL Scheme, and whether the current scheme is fair or not. Some questioned whether it is received automatically or not, and several participants noted they received a payment without the need to apply.

Some criticisms of the Scheme included that the 'nine interruptions in a year or for each and any interruption greater than 12 hours' seemed excessive and some participants believed they were likely to have experienced this level but did not receive a payment. Others viewed the thresholds as excessive and the value of payments insufficient.

While some debate surrounded whether the \$9 Million paid each year might be best paid to improve the overall network, there was general support for the existence of the GSL and an inability to provide a better alternative.

Most had little, if any, experience with the GSL Scheme, so discussion surrounding its future was soft and it was not viewed as a priority area from the participants.

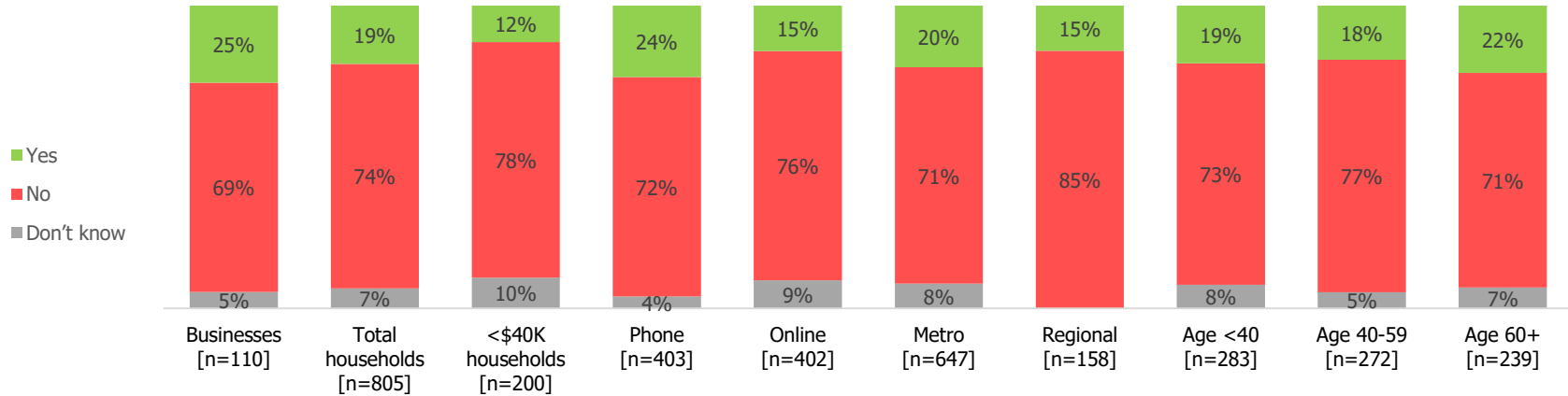
"I think it's reasonable that people receive a payment in those situations."

[Focus group: Metro – North]

"I think it's fair enough."

[Focus group: Adelaide Hills]

28. Have you heard of SA Power Networks' Guaranteed Service Level Scheme before today?



Awareness of the SA Guaranteed Service Level Scheme is low

29. Have you ever received a payment through the Guaranteed Service Level Scheme? [Of those that had heard of the SA Power Networks GSL Scheme]

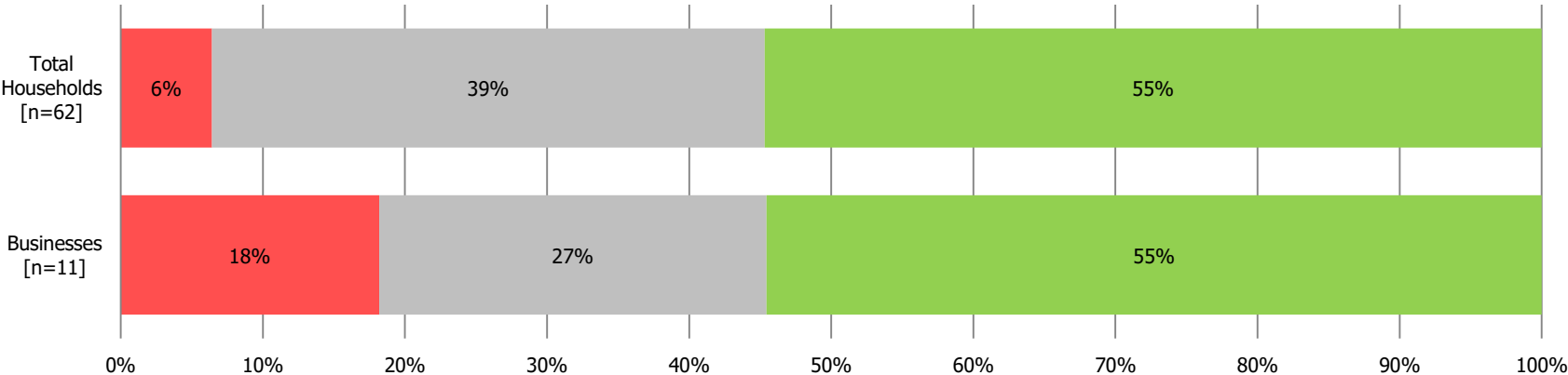
	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	28	155	24	95	60	132	23	54	48	53
Yes	39%	40%	35%	37%	44%	36%	59%	38%	43%	38%
No	57%	59%	63%	61%	55%	63%	37%	60%	56%	59%
Don't know	4%	2%	3%	2%	1%	1%	5%	1%	1%	3%

Q30. How satisfied were you with the Guaranteed Service Level Scheme payment you received?
Please use a 0-10 scale, where 0 is extremely dissatisfied, and 10 is extremely satisfied.
[Of those that had received payment as part of the GSL Scheme]

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	11	62	8	35	26	48	14	21	21	20
Mean	6.5	5.2	7.8	5.4	5.0	4.9	6.4	5.9	5.0	4.9

Q30. How satisfied were you with the Guaranteed Service Level Scheme payment you received?

Extremely dissatisfied [0-2] Moderate/Neutral [3-7] Extremely satisfied [8-10]



Presented to survey respondents for context:

- ▶ Sometimes customers experience interruptions to their electricity supply
- ▶ When this occurs customers may be entitled to reliability Guaranteed Service level [GSL] payment
- ▶ These payments are made to customers when they experience more than 9 interruptions in a year or for each and any interruption greater than 12 hours
- ▶ Approximately \$9m each year is paid in reliability GSL payments to customers around the state
- ▶ All customers pay for the costs of this scheme, at a cost of approximately \$10 per customer per year

31. Knowing this, how acceptable do you find the conditions of the Guaranteed Service Level Scheme?
Please use a 0-10 scale, where 0 is unacceptable, and 10 is extremely acceptable.

MEAN SCORE	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
n	110	805	200	403	402	647	158	283	272	239
Payment for interruption greater than 12 hours	6.1	6.9	7.3	6.9	6.9	6.6	8.1	6.7	6.8	7.5
Payment if over 9 outages per year occur	5.6	6.4	6.7	6.5	6.4	6.1	7.7	6.4	6.2	7.0
All customers pay for the scheme	4.3	5.0	4.8	5.4	4.7	4.7	6.2	5.6	4.9	4.8

The most acceptable condition for the GSL scheme is **payment for interruption greater than 12 hours**; least acceptable is that all customers pay for the scheme.

Education around this may help increase acceptance levels.

Expectations of payment re: GSL payments [Survey]

Q32. When would you consider the GSL payment should be paid in relation to length of interruption to supply?
[Of those that indicated 0-4 with regards to 'payment for interruption greater than 12 hours']

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	32	145	101	80	65	137	8	49	52	32
0-5 hours	63%	44%	21%	46%	42%	43%	57%	53%	50%	37%
6-8 hours	22%	27%	31%	14%	44%	29%	-	23%	29%	42%
8-11 hours	13%	15%	31%	20%	9%	15%	16%	24%	12%	10%
Other	3%	14%	16%	21%	5%	13%	27%	-	9%	11%

Q33. When would you consider the GSL payment should be paid in relation to number of outages?
[Of those that indicated 0-4 with regards to 'payment if over 9 outages per year occur']

	Businesses	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	36	181	117	91	90	167	15	57	69	44
1-3 outages per year	61%	49%	31%	44%	55%	51%	30%	61%	48%	48%
4-6 outages per year	25%	28%	43%	20%	36%	28%	31%	15%	38%	38%
7-8 outages per year	8%	4%	14%	5%	3%	3%	14%	1%	5%	8%
Other	6%	19%	12%	31%	6%	18%	25%	22%	9%	6%

Businesses are far less tolerant of outages, both in duration and frequency, with higher expectations of when payments should be made.

Future Network

Generally, there was a low level of understanding across the focus groups as to what the future electricity network could look like. Even many of those who had already invested in solar in recent years illustrated a level of frustration and lack of value, such as paying much more to draw from the network than what they receive for feeding back into the grid.

Areas such as the Adelaide Hills, Port Lincoln and Renmark, and businesses who experienced more regular outages and believed that unpredictable reliability is a certainty into the future, had given a greater level of thought to future solutions and how to be more self reliant.

The need for future thinking and solutions was acknowledged, but in general it was clear that little consideration had been given by participants to how the network would evolve in the future. Most believed that the network infrastructure needed to be upgraded and they have given little if any consideration to future options for themselves, their households and businesses. Upon showing a 5-minute 'Future Networks' video from SA Power Networks, most acknowledged it as an important and relevant discussion.

This included ...

1. The need to be able access reliable electricity irrespective of your future network decisions
2. Affordability – concern that those who can afford will become more self sufficient, and those who cannot will pay more
3. Confusion as to what the choices are, and need for education
4. Fundamental need for a reliable infrastructure
5. Acceptance that in regional and remote areas especially this inevitable
6. Choice, based on affordability of solution and electricity needs

"Really opened my eyes to the future and I really hadn't thought about the future at all. For them to be thinking about the future that is good, thinking about all the options is good." [Focus group: Port Lincoln]

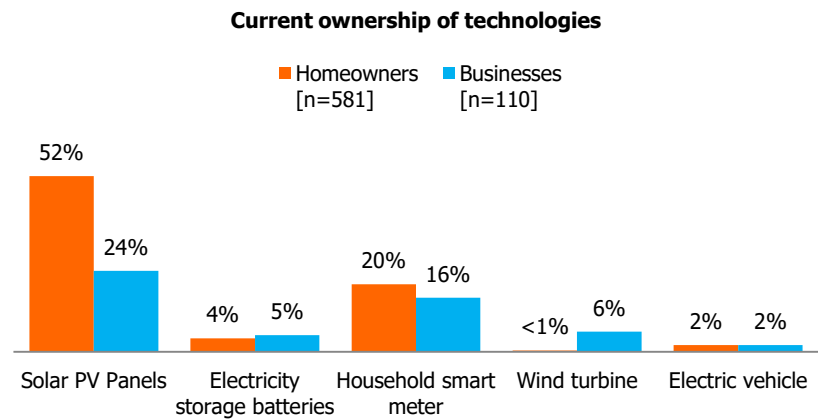
"Separation from the grid is the most exciting part of it and having those flexible options." [Focus group: Adelaide Hills]

"No incentive to do greener things but there should be." [Focus group: Metro – North]

"Good to know the company is actually working on future strategies." [Focus group: Renmark]

34. Do you own your current home, paying a mortgage or renting [or living in a share household]?									
	Total Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Own / paying a mortgage	72%	57%	82%	62%	68%	91%	58%	80%	79%
Renting / do not own	28%	43%	18%	38%	32%	9%	42%	20%	21%

35. Thinking about the following options available to households, which of these do you currently have, or plan to have for the future?



Ownership of most of the listed technologies [i.e. electricity storage batteries, a household smart meter, a wind turbine, or an electric vehicle] was low, with the exception of solar panels being currently owned by one-quarter of the businesses surveyed [24%] and more than half of South Australian households [52%].

Notable differences between segments highlighted that 26% of those aged under 40 were planning on having electricity battery storage in the next 1-2 years, compared to 17% of those aged 40-59 and 10% of those aged over 60. This was followed closely by regional households at 23%, while technologies such as wind turbines, smart meters or electric vehicles were less of a consideration.

Solar PV panels										
[Of those that own their home/are paying a mortgage]										
	Businesses	Homeowners	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	581	115	330	250	438	143	163	219	187
Currently	24%	52%	52%	58%	44%	50%	58%	40%	51%	61%
Next 1-2 years	17%	10%	4%	11%	9%	9%	13%	17%	9%	5%
Next 5 years	17%	11%	6%	9%	13%	11%	12%	24%	8%	4%
10 years plus	6%	4%	2%	1%	8%	5%	<1%	7%	5%	<1%
Never	17%	13%	21%	15%	9%	14%	11%	3%	16%	19%
Don't know	18%	10%	15%	6%	17%	12%	5%	10%	11%	10%

35. Thinking about the following options available to households, which of these do you currently have, or plan to have for the future?

Electricity storage batteries [Of those that own their home/are paying a mortgage]										
	Businesses	Homeowners	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	581	115	330	250	438	143	163	219	187
Currently	5%	4%	2%	4%	2%	4%	1%	8%	2%	1%
Next 1-2 years	13%	17%	8%	20%	13%	15%	23%	26%	17%	10%
Next 5 years	23%	19%	15%	16%	23%	18%	20%	21%	21%	15%
10 years plus	11%	8%	5%	6%	10%	7%	11%	13%	7%	5%
Never	19%	27%	37%	32%	20%	27%	27%	16%	28%	37%
Don't know	29%	26%	33%	21%	33%	29%	18%	15%	25%	33%

Household smart meter [Of those that own their home/are paying a mortgage]										
	Businesses	Homeowners	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	581	115	330	250	438	143	163	219	187
Currently	16%	20%	20%	19%	22%	23%	13%	18%	21%	23%
Next 1-2 years	19%	9%	6%	9%	9%	7%	15%	16%	8%	5%
Next 5 years	11%	8%	3%	6%	10%	8%	7%	12%	8%	3%
10 years plus	8%	2%	2%	<1%	5%	3%	-	3%	2%	1%
Never	12%	29%	33%	35%	22%	26%	40%	27%	31%	32%
Don't know	34%	32%	37%	31%	34%	34%	26%	25%	30%	36%

Between one-quarter and one-third typically state that they don't know when they plan to have electricity storage batteries or household smart meters, or never plan on having them.

35. Thinking about the following options available to households, which of these do you currently have, or plan to have for the future?

Wind turbine [Of those that own their home/are paying a mortgage]										
	Businesses	Homeowners	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	581	115	330	250	438	143	163	219	187
Currently	6%	<1%	-	<1%	1%	<1%	<1%	1%	<1%	-
Next 1-2 years	6%	2%	2%	1%	3%	3%	-	3%	2%	2%
Next 5 years	8%	4%	1%	1%	7%	4%	3%	8%	4%	1%
10 years plus	7%	5%	2%	5%	5%	3%	9%	13%	2%	1%
Never	50%	65%	64%	76%	52%	63%	73%	56%	72%	71%
Don't know	22%	24%	31%	17%	32%	27%	15%	20%	20%	26%

Electric vehicle [Of those that own their home/are paying a mortgage]										
	Businesses	Homeowners	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	110	581	115	330	250	438	143	163	219	187
Currently	2%	2%	1%	2%	1%	2%	1%	3%	1%	1%
Next 1-2 years	7%	3%	1%	2%	3%	3%	3%	4%	3%	2%
Next 5 years	13%	7%	4%	4%	12%	9%	2%	8%	9%	6%
10 years plus	14%	10%	5%	8%	11%	10%	8%	15%	11%	5%
Never	32%	56%	60%	69%	38%	49%	76%	53%	55%	63%
Don't know	32%	23%	30%	14%	34%	27%	10%	16%	21%	25%

Wind turbines and electric vehicles are not in future considerations of many South Australians.

36. How important are the following ideas for future planning of the network?
Please use a 0-10 scale, where 0 is of no importance to you, and 10 is extremely important.
[Of those that own their home/are paying a mortgage or own a business]

MEAN SCORE	Businesses	Home-owners	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
SA Power Networks use innovative technologies to manage the network in the future	7.1	8.4	7.9	8.8	7.9	8.2	8.9	8.5	8.3	8.4
Reliability is improved in regional areas so that it more closely matches metropolitan standards	-	8.4	8.2	8.7	8.0	8.3	8.8	8.3	8.2	8.6
I can help manage my costs by having control over how and when I use my electricity	7.1	8.3	8.2	8.7	7.8	8.2	8.6	8.2	8.3	8.3
The network is equipped to support a range of options, for example, if people want to go entirely off the grid, or if they want to trade their surplus electricity with other customers	6.8	8.1	7.6	8.2	7.8	7.9	8.7	8.3	8.1	8.0
I am able to use whatever new technologies I want such as solar PV, battery storage or drive an electric car	7.1	8.0	7.4	8.3	7.7	7.8	8.6	8.4	8.1	7.4
I know where to go to access information and understand my options	7.3	8.0	7.4	8.4	7.5	7.9	8.3	7.9	8.1	7.9
I understand the changes that are happening in the electricity industry	7.1	7.5	7.0	7.7	7.2	7.3	8.0	7.6	7.6	7.3
I have access to information about my household energy usage and can regularly monitor my use through in-home displays or apps	6.8	7.5	6.8	7.7	7.2	7.4	7.7	7.8	7.6	6.9

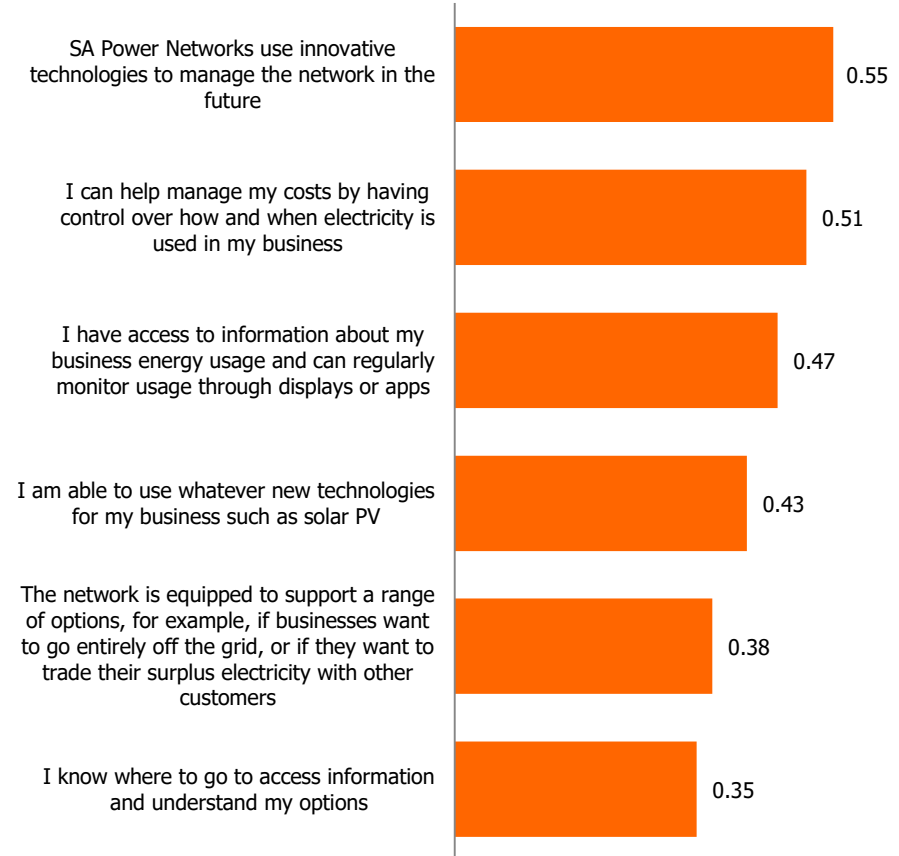
No correlation was found between ratings of importance for these ideas and with ratings of reliability for households; i.e. higher reliability is not related to the importance of the ideas regarding future networks.

However moderate correlations were found for businesses between each of the statements and indications of reliability – most salient was that 'SA Power Networks use innovative technologies to manage the network in the future'.

This suggest that businesses experiencing higher levels of reliability may be more conscious of SA Power Networks' ability to manage the electricity network with innovative technologies.

Correlations between reliability and each statement, business sample

[All correlations were statistically significant, $p < 0.05$]



Other Drivers of Customer Satisfaction

Other key drivers to satisfaction were discussed within the focus groups as below.

Understanding of concepts such as 'security of supply,' 'safety of supply' and 'quality of supply' are low. The vast majority had not previously heard these terms. Most, other than households experiencing an above average level of outages, believed that the security, safety and quality of electricity supply to their house was generally at a reasonable level.

"In the hills they turn it off for safety reasons, like bushfire, or severe weather." [Focus group: Metro – East]

"A robustness, so that if one or two things fall over they can isolate them." [Focus group: Metro – West]

Similarly, discussions around infrastructure management focussed more around the experts doing what is right and responsible.

"Generally quite well managed." [Focus group: Renmark]

Environmental performance of SA Power Networks and stakeholders was viewed as good, although most were not particularly confident in discussing this due to a lack of knowledge or information. Some believed that the overall network is heading in the right environmental direction. Others were unclear or even unconvinced that the environmental direction is right for South Australians.

"To be honest I don't think about it much. I've got solar so I have thought about it for myself, but not how they are generating it." [Focus group: Metro – West]



Appendices

Household demographic profile

Income differences

Weighting Information

Data presented throughout this report has used weighted counts and percentages. Presented below is this data compared with unweighted counts and percentages.

The data was weighted to the age and gender of the 2015 Estimated Resident Population [ERP], published by the Australian Bureau of Statistics [ABS].

Gender		
	Unweighted	Weighted
Column n	805	805
Male	51%	49%
Female	49%	51%
Prefer not to say	<1%	<1%

Age		
	Unweighted	Weighted
Column n	805	805
18 - 24	3%	7%
25 - 29	4%	9%
30 - 34	6%	11%
35 - 39	7%	8%
40 - 44	9%	8%
45 - 49	12%	9%
50 - 54	11%	9%
55 - 59	13%	8%
60 - 64	12%	8%
65 - 69	11%	7%
70+	11%	15%
Not stated	<1%	2%

Key Segments: Demographic Breakdown

Gender									
	Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Male	49%	39%	49%	49%	49%	51%	49%	50%	47%
Female	51%	60%	51%	51%	51%	48%	51%	50%	54%
Prefer not to say	<1%	1%	<1%	<1%	<1%	1%	-	<1%	-

Into which age range do you fall?									
	Households	<\$40K households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
18 - 24	7%	5%	3%	12%	8%	5%	21%	-	-
25 - 29	9%	7%	9%	9%	9%	8%	25%	-	-
30 - 34	11%	3%	14%	9%	10%	18%	32%	-	-
35 - 39	8%	3%	8%	8%	7%	10%	22%	-	-
40 - 44	8%	3%	8%	8%	8%	11%	-	25%	-
45 - 49	9%	6%	9%	9%	8%	10%	-	25%	-
50 - 54	9%	7%	9%	9%	9%	8%	-	26%	-
55 - 59	8%	8%	8%	8%	8%	10%	-	25%	-
60 - 64	8%	10%	8%	8%	8%	8%	-	-	25%
65 - 69	7%	14%	7%	7%	7%	6%	-	-	23%
70+	15%	34%	15%	15%	17%	7%	-	-	51%
Not stated	2%	<1%	3%	-	2%	-	-	-	-

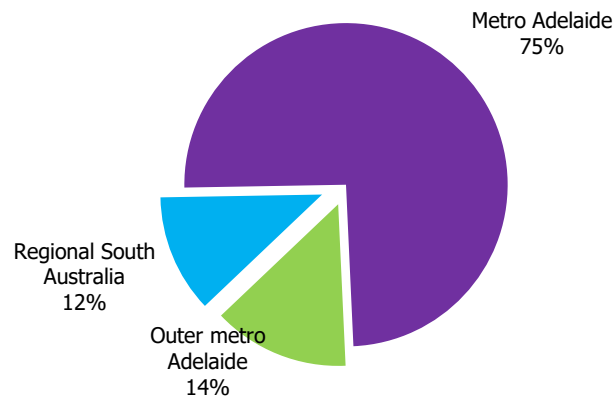
Key Segments: Regional Skew

Which region of South Australia do you live in?

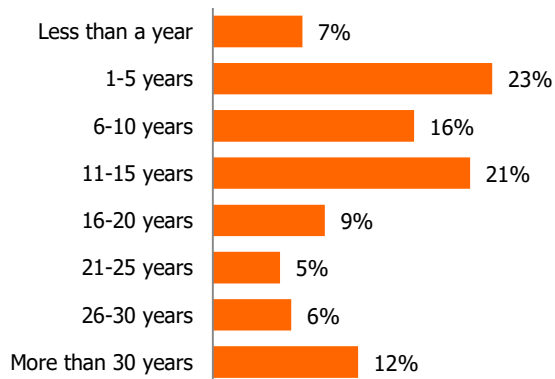
	Households	<\$40K households	Phone	Online*	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Metropolitan Adelaide – East and CBD	47%	44%	17%	77%	59%	-	52%	44%	48%
Metropolitan Adelaide – West	20%	27%	16%		24%	-	15%	19%	21%
Metropolitan Adelaide – North	7%	11%	15%		9%	-	5%	7%	12%
Metropolitan Adelaide – South	6%	5%	13%		8%	-	6%	8%	5%
Adelaide Hills	6%	4%	12%	23%	-	31%	5%	9%	4%
Regional/Rural SA – Eyre Peninsula	2%	2%	3%		-	8%	1%	2%	2%
Regional/Rural SA – Yorke Peninsula/ Flinders	1%	1%	2%		-	6%	1%	2%	1%
Regional/Rural SA – Barossa Valley , Gawler and surrounds	2%	1%	5%		-	12%	4%	2%	1%
Regional/Rural SA – Fleurieu Peninsula/Kangaroo Island	3%	1%	6%		-	15%	6%	2%	2%
Regional/Rural SA – Far north [Roxby and Coober Pedy]	1%	1%	2%		-	4%	-	1%	1%
Regional/Rural SA – Riverland	2%	2%	3%		-	8%	1%	3%	2%
Regional/Rural SA – South East incl. Mt Gambier	3%	2%	6%		-	16%	6%	2%	2%

Key Segments: Business Breakdown

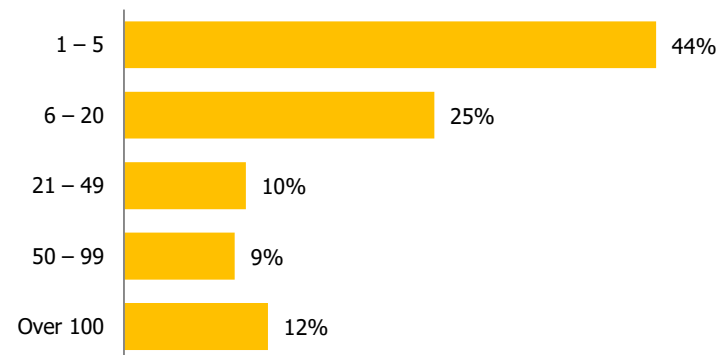
In which area is your business located?
[n=110]



How long has your business been operating?
[n=110]



How many full-time equivalent staff does your business employ?
[n=110]



Key Segments: Business Breakdown [cont'd]

What industry sector would you describe your business as best fitting?	
Retail and Consumer Products	13%
Healthcare and Medical	9%
Construction	6%
Design and Architecture	6%
Information and Communication Technology	6%
Transport and Logistics	6%
Education and Training	5%
Government and Defence	4%
Manufacturing and Wholesale	4%
Trades and Services	4%
Advertising and Media	3%
Arts and Entertainment	3%
Community Services and Development	3%
Farming, Animals and Conservation	3%
Food, wine and beverage	3%
Hospitality and Tourism	3%
Legal Services	3%
Not for Profit	3%
Banking and Financial Services	2%
Engineering	2%
Marketing and Communications	2%
Mining, Resources and Energy	2%
Human resources and recruitment	1%
Insurance and Superannuation	1%
Property and Real Estate	1%
Science and Technology	1%
Other [please specify]	4%

Survey: Household demographic information

37. Would you consider yourself an Australian or from another background?

	Households	<\$40K Households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Australia – non aboriginal/TSI	87%	82%	95%	80%	85%	97%	87%	86%	88%
Australian aboriginal	1%	2%	1%	1%	1%	1%	1%	1%	1%
Canada	<1%	-	<1%	-	<1%	-	-	<1%	-
China	<1%	1%	-	<1%	<1%	-	-	<1%	-
Germany	1%	1%	-	1%	1%	-	<1%	<1%	1%
Greece	<1%	-	<1%	-	<1%	-	-	-	<1%
Holland/Netherlands	<1%	<1%	-	<1%	<1%	-	-	<1%	<1%
Hong Kong	1%	2%	1%	<1%	1%	-	1%	1%	-
Italy	1%	<1%	1%	1%	1%	-	<1%	1%	1%
Malaysia	1%	<1%	<1%	2%	1%	-	2%	1%	<1%
New Zealand	<1%	-	-	<1%	<1%	-	1%	-	-
Philippines	<1%	-	-	1%	<1%	-	-	1%	-
Poland	<1%	-	<1%	-	<1%	-	-	1%	-
UK and Ireland	4%	7%	1%	7%	5%	1%	1%	6%	7%
USA	<1%	<1%	-	<1%	<1%	-	-	1%	-
Vietnam	<1%	-	-	<1%	<1%	-	1%	-	-
African country	<1%	<1%	-	<1%	<1%	-	-	<1%	-
South American Country	<1%	1%	-	1%	<1%	-	1%	-	-
Other	3%	2%	1%	5%	3%	<1%	5%	2%	1%

Survey: Household demographic information

38. What bracket would your annual household income fall into?

	Households	<\$40K Households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Under \$20,000	8%	30%	9%	7%	8%	4%	4%	4%	16%
Over \$20,000 but under \$40,000	17%	70%	12%	23%	18%	15%	9%	14%	33%
Over \$40,000 but under \$60,000	16%	-	13%	19%	16%	18%	19%	13%	16%
Over \$60,000 but under \$80,000	11%	-	12%	9%	10%	11%	8%	13%	5%
Over \$80,000 but under \$100,000	15%	-	17%	13%	14%	19%	24%	15%	6%
Over \$100,000 but under \$140,000	9%	-	9%	9%	9%	10%	6%	16%	5%
Over \$140,000 but under \$180,000	7%	-	8%	6%	8%	5%	11%	9%	1%
\$180,000 or more	4%	-	5%	3%	3%	7%	7%	4%	-
Refused	9%	-	9%	9%	10%	5%	4%	9%	16%
Don't know	4%	-	6%	3%	4%	7%	7%	3%	2%

Survey: Household demographic information

39. Which of the following best describes what you do?

	Households	<\$40K Households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Work full-time	38%	8%	43%	32%	35%	47%	57%	47%	6%
Work part-time	18%	14%	14%	21%	18%	19%	20%	25%	9%
Home duties	7%	6%	9%	6%	7%	9%	9%	9%	4%
Unemployed	4%	8%	2%	5%	4%	2%	4%	5%	2%
Retired	26%	51%	28%	25%	29%	17%	1%	7%	76%
Student	4%	5%	2%	7%	5%	1%	9%	3%	-
Other	3%	8%	3%	4%	3%	5%	1%	5%	4%

Survey: Household demographic information

40. Which of the following best describes your household composition?									
	Households	<\$40K Households	Phone	Online	Metro	Regional	Age <40	Age 40-59	Age 60+
Column n	805	200	403	402	647	158	283	272	239
Young single person living alone	8%	3%	7%	8%	8%	8%	16%	1%	-
Young couple, living separately	2%	<1%	3%	<1%	1%	5%	5%	-	-
Young couple, living together	5%	5%	1%	9%	6%	1%	11%	3%	<1%
Young family, with all children primary school aged or younger	20%	5%	26%	14%	16%	38%	40%	17%	<1%
Middle family, with a high school aged child still living at home	11%	6%	12%	10%	11%	8%	7%	24%	1%
Mature family, with all children living at home older than high school age	10%	4%	10%	11%	11%	7%	11%	15%	5%
Mature couple living together	26%	31%	25%	26%	26%	26%	2%	23%	58%
Mature person	17%	41%	15%	19%	20%	8%	3%	16%	36%
Prefer not to say	2%	4%	1%	3%	3%	<1%	5%	1%	<1%

Income differences

Demographic breakdown

The responses of those with an annual household income of less than \$40,000 and more than \$40,000 were compared to determine whether differences existed between the two segments.

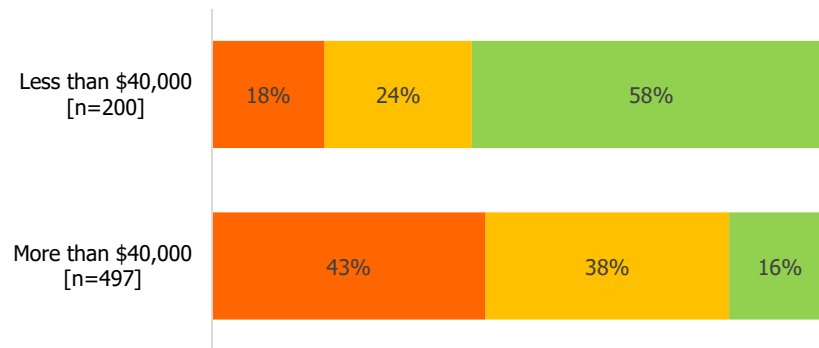
A demographic breakdown of the segments highlighted that 58% of those with annual household incomes of less than \$40,000 were aged 60+.

Furthermore, 78% of those with an annual household income of more than \$40,000 own their house or are paying a mortgage [contrast with only 57% of those with an annual household income of less than \$40,000].

Only minor differences were found between the segments.

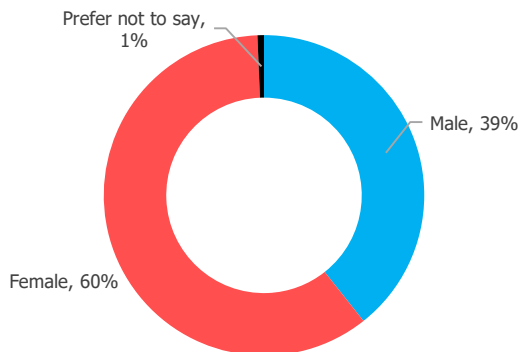
Age breakdown

18 - 39 40 - 59 60+



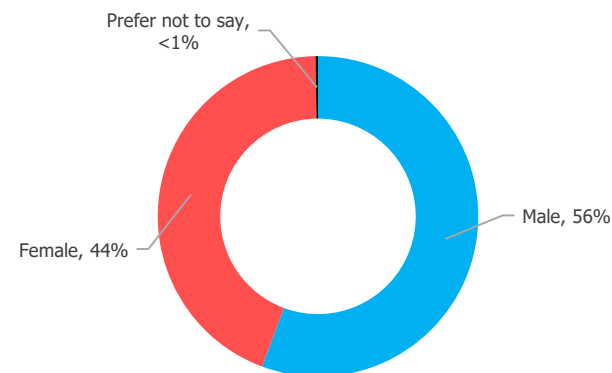
Less than \$40,000

[n=200]



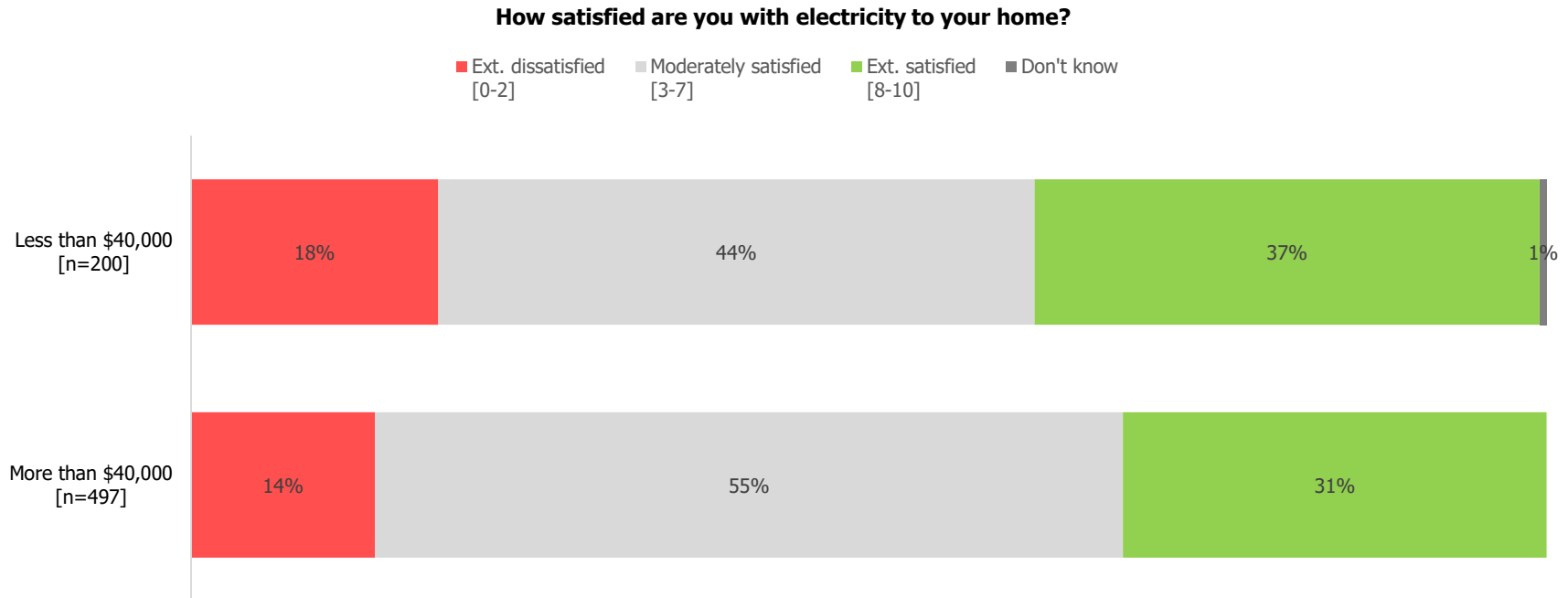
More than \$40,000

[n=497]



Satisfaction with electricity to the home

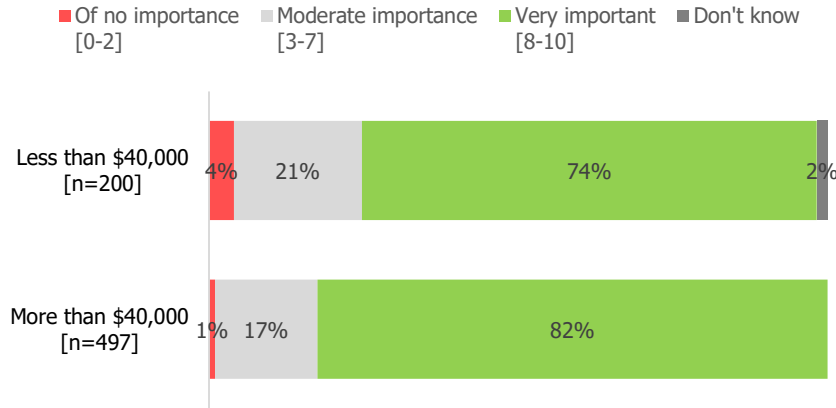
A smaller proportion of those with an annual household income of less than \$40,000 are only moderately satisfied with electricity to their home, compared with those with annual household incomes of more than \$40,000. This has resulted in a slightly larger proportion of those indicating 'extremely satisfied' [37%], as well as 'extremely dissatisfied' [18%].



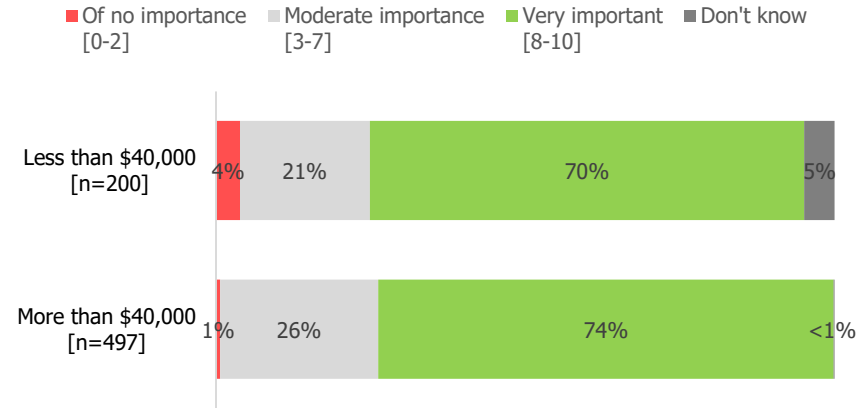
Importance of electricity to the home

How important are the following topics in terms of electricity to your home?

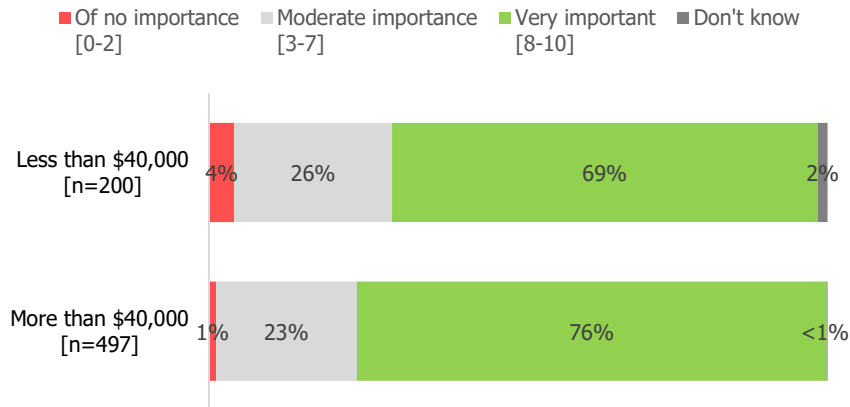
Power outages don't last too long



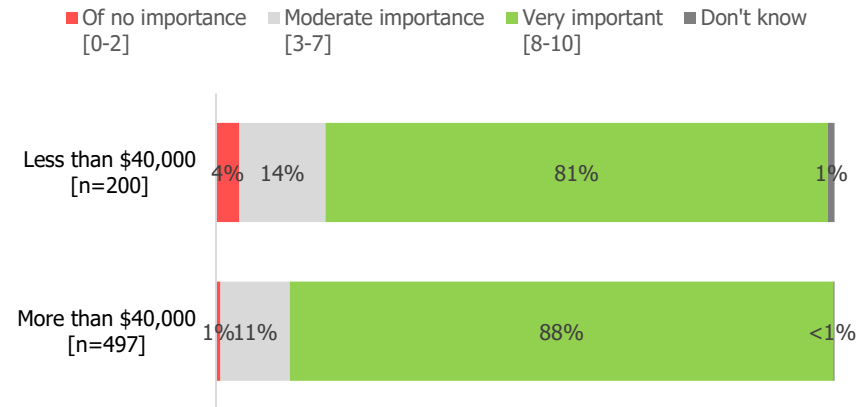
I have access to information about power outages



I have confidence that I will have power



The cost of electricity to my home



Statistically significant difference exist between the two groups: A higher proportion of those with an annual household income of less than \$40,000 indicate 'Don't know', driven largely by those with annual household incomes of less than \$20,000.

Overall, how would you rate the reliability of the electricity supply to your home?

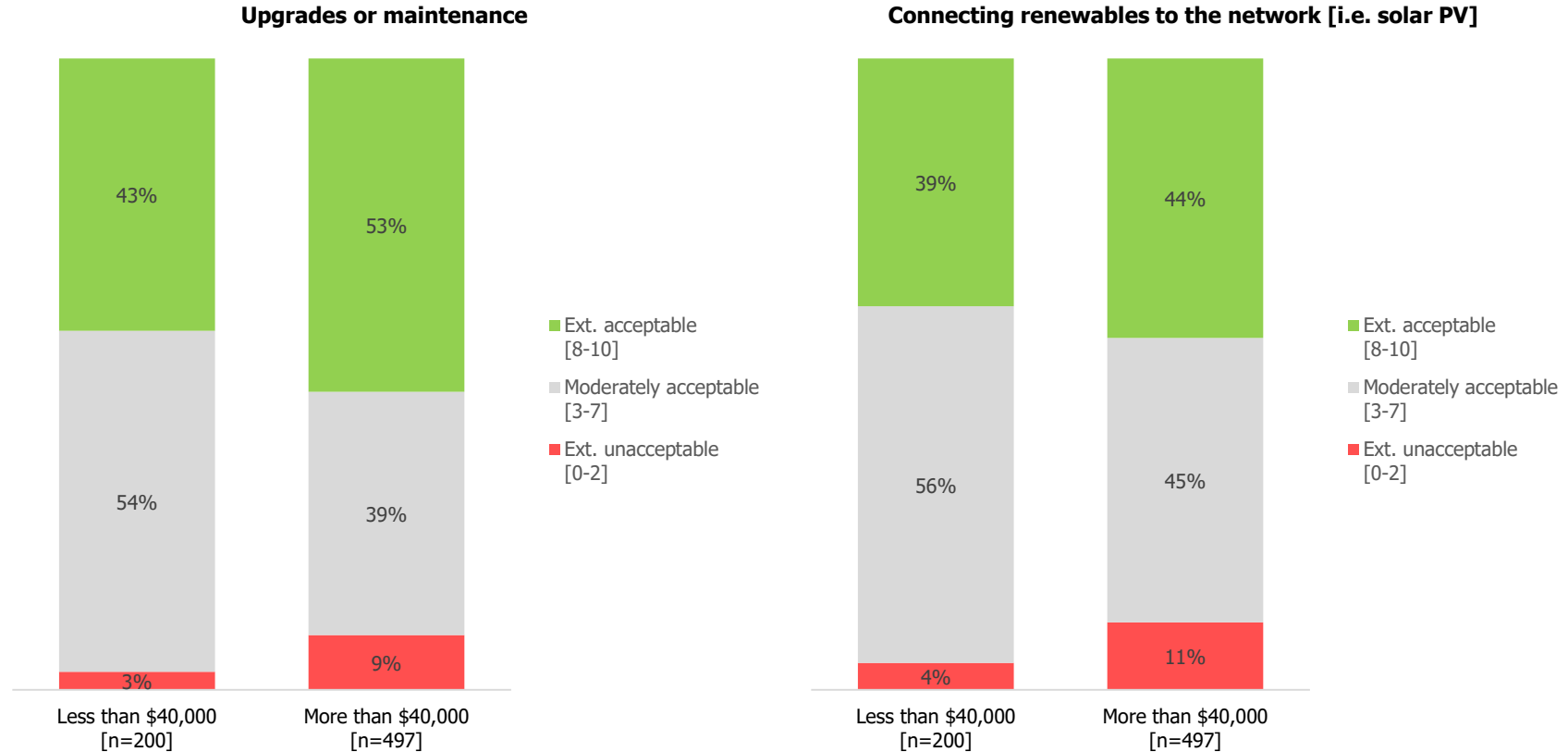
Overall, how do you tolerate the level of reliability at your home?



A larger proportion of those with annual household incomes of less than \$40,000 indicate the reliability of the electricity supply to their home is extremely good [61%] or that their tolerance to the level of reliability to their home is extremely good [60%] compared to those with annual household incomes of more than \$40,000.

Acceptance of outages

Thinking about planned outages, how acceptable are the following outages on a scale from 0 to 10?



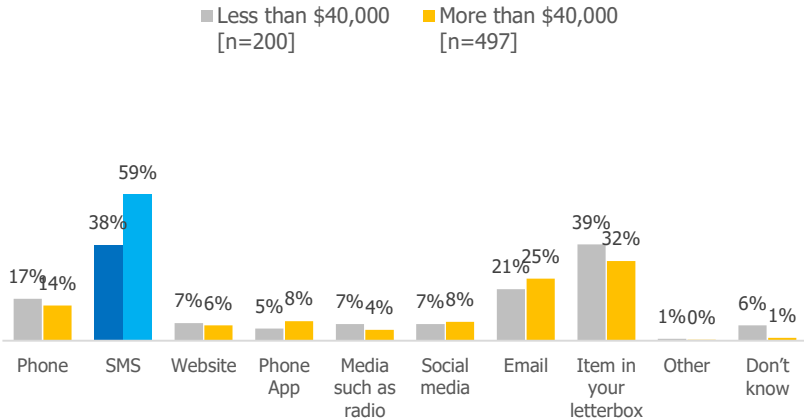
A larger proportion of those with annual household incomes of less than \$40,000 indicated that planned outages due to upgrades/maintenance [54%], or due to connecting renewables to the network [56%] are 'moderately acceptable' – more than half the segment.

Communications from SA Power Networks

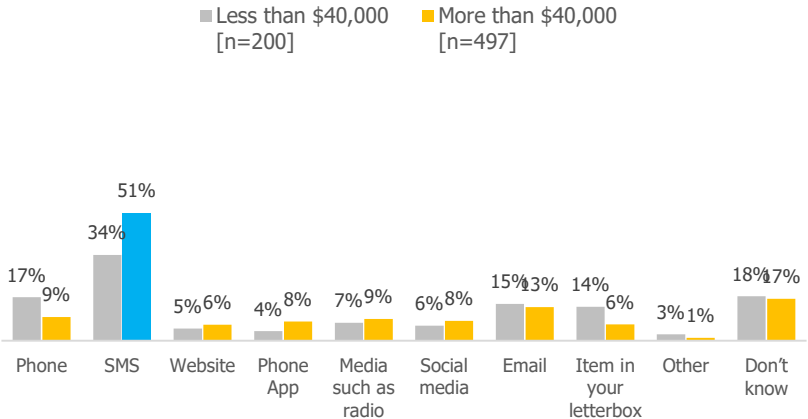
How would you prefer SA Power Networks to contact you in the following situations?

Here, the preferred media by which SA Power Networks customers prefer to be contacted is examined for different situations. Statistically significant differences are highlighted in blue.

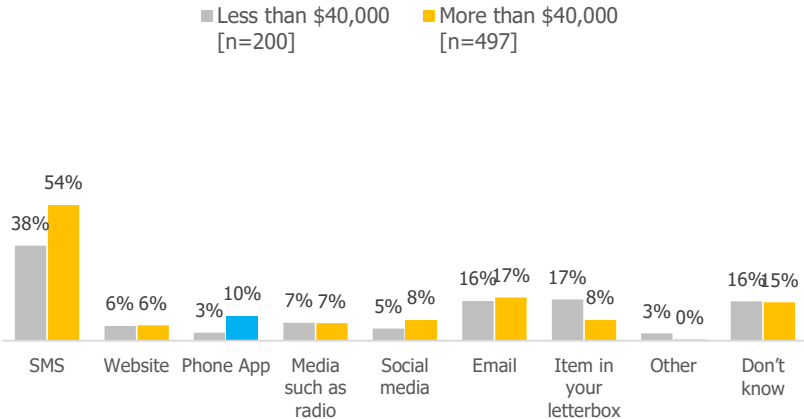
Reporting a planned outage



After an unplanned outage



During and after a planned outage

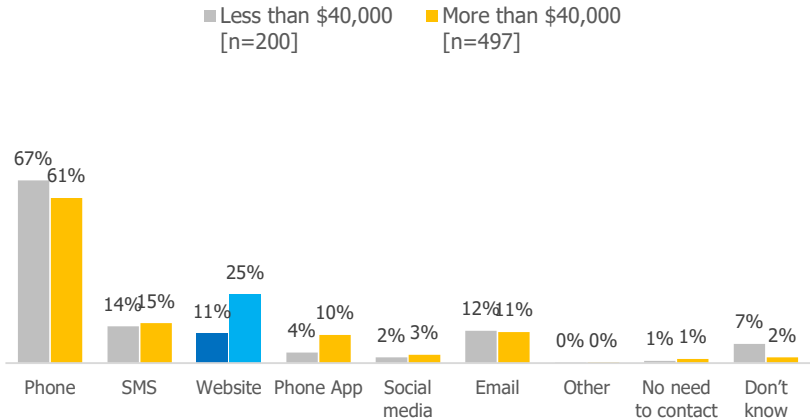


Communicating with SA Power Networks

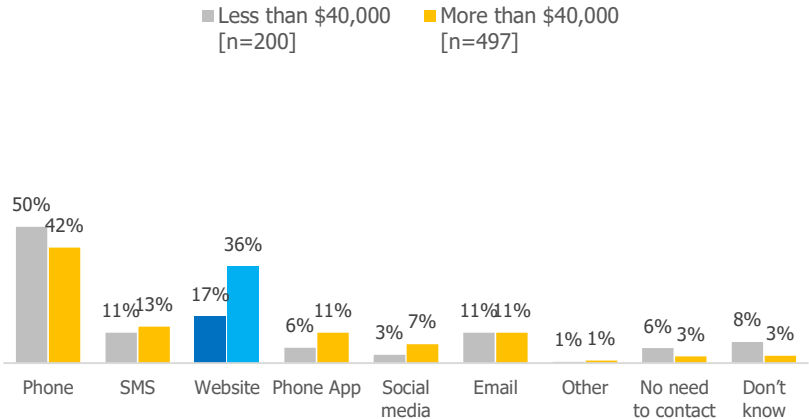
How would you prefer to communicate with SA Power Networks in the following situations:

Higher income households prefer to use a website to communicate with SA Power Networks [more graphs are on the following pages]. This difference may be attributable to the prevalence of respondents aged 60+ in the lower annual household income segment. Statistically significant differences are highlighted in blue.

Reporting an outage



Checking on a planned outage

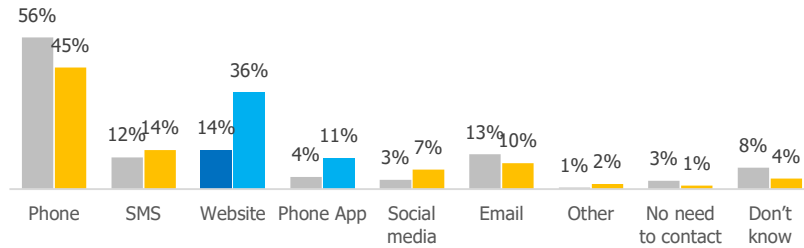


Communicating with SA Power Networks [cont'd]

How would you prefer to communicate with SA Power Networks in the following situations:

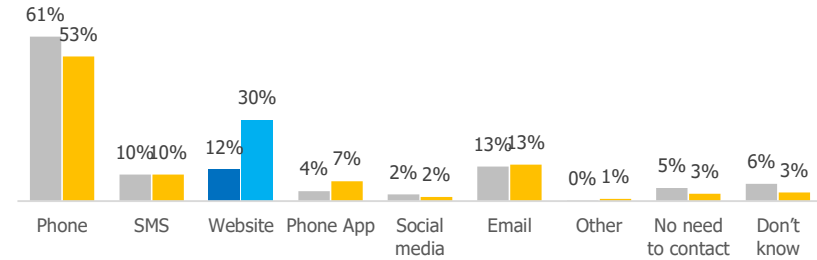
Checking on an unplanned outage

■ Less than \$40,000 [n=200] ■ More than \$40,000 [n=497]



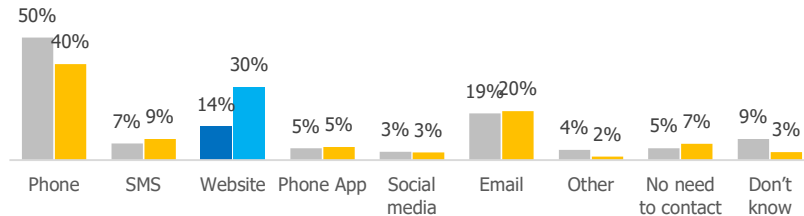
Reporting a faulty street light

■ Less than \$40,000 [n=200] ■ More than \$40,000 [n=497]



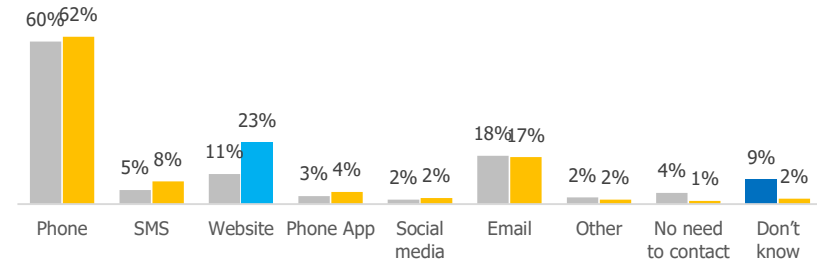
Information about future electricity supply options to my home

■ Less than \$40,000 [n=200] ■ More than \$40,000 [n=497]



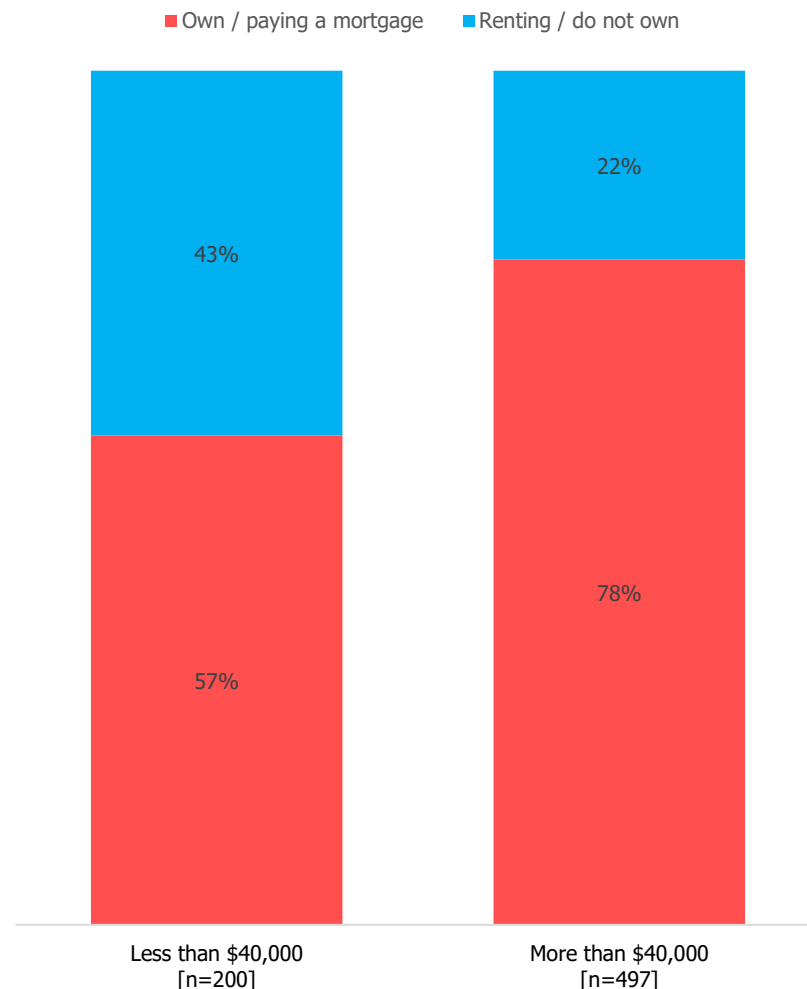
Making another enquiry

■ Less than \$40,000 [n=200] ■ More than \$40,000 [n=497]



Home ownership

Another notable finding was that a higher proportion of those with annual household incomes less than \$40,000 rent or do not own their own house [43%], compared with those with annual household incomes of more than \$40,000 [22%].

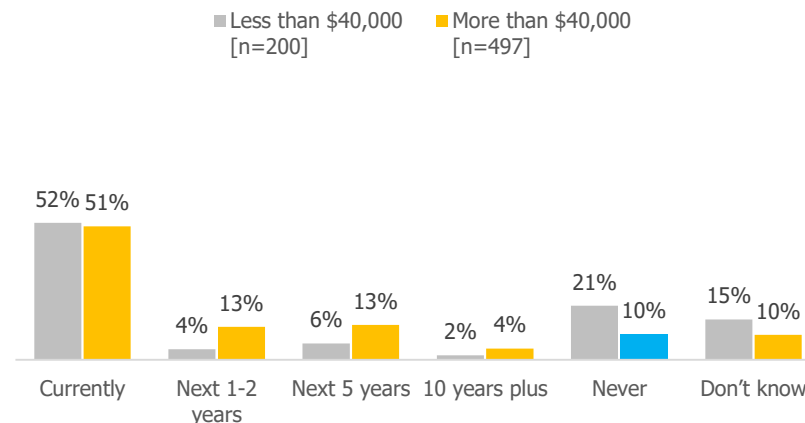


Ownership of Future Network technologies

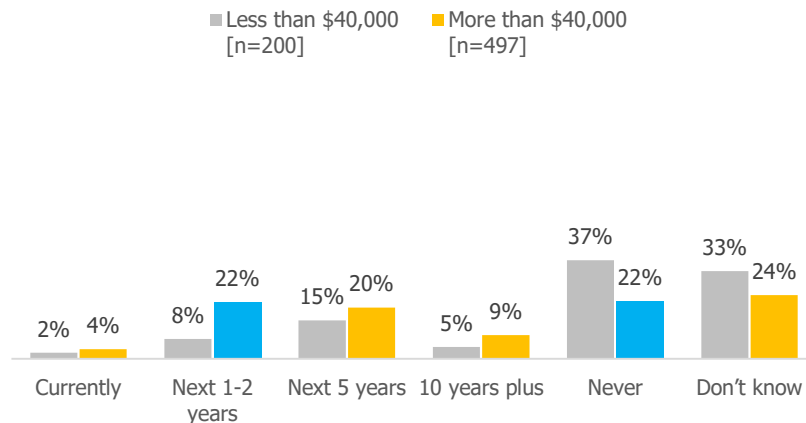
Current solar PV panel ownership is similar between the two segments., however a much smaller proportion of those with annual household incomes above \$40,000 indicate they will **never** have panels [10%].

Similarly, a smaller proportion of respondents with higher annual household incomes indicate they will **never** have electricity storage panels [22%] compared to lower annual household incomes [37%], instead considering adoption within the next 1-2 years [22%].

Solar PV panels



Electricity storage batteries



Household smart meter

