



AusNet Electricity Services Pty Ltd

Electricity Distribution Price Review 2022-26

Appendix 3H: Clyde North and Doreen Customer Survey

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Clyde North and Doreen Customer Research

Service reliability perceptions and expectations

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AusNet Services Customer Forum

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Key findings



Key findings

Issue 1:

Clyde North and Doreen in outer Melbourne continue to experience rapid population growth, which has resulted in significant growth in the demand for electricity. This increase in demand for electricity can place pressure on the network, and in turn can affect the reliability of supply for customers. As at July 2018, AusNet Services was considering augmentation options to meet the projected growth in demand

To help inform its negotiating position, the Customer Forum needed to know:

- The extent customers in those locations were experiencing outages
- The impact of those outages on customers
- Customers' attitudes to AusNet Services proposed augmentation options

Conclusions – Clyde North

- 64% had experienced an outage in the last two years (35% within a month of being surveyed) – mostly the outage was planned
 - Most customers believe an outage frequency of no more than once every two or three months is acceptable
 - For most customers (61%) an outage of at least an hour has a significant impact on them
- Most customers (93%) believe it is very important that current reliability is maintained
 - Most (71%) would be willing to pay an additional 43 cents each year on their electricity bill from 2021-2025 to pay for the cost of upgrading the network in their area to avoid the risk of two outages of around 2 hours and 45 minutes occurring over that period and most (71%) believe it is fair that all customers should pay to maintain the reliability in their area
- Prior awareness of programs that offer incentives to customers to volunteer to manually turn down, turn off, or reschedule appliance use at peak times was moderate (41%)
 - Following the explanation to all customers such programs were generally supported in the short to medium term (by >70% of all Clyde North customers)
 - Most customers are willing to participate in a scheme simply to reduce the risk of blackouts in their area (74%) with no other incentive
- Most customers are interested in receiving information when a blackout occurs



Key findings

Issue 1 continued

Conclusions – Doreen

- 81% had experienced an outage in the last two years (35% within a month of being surveyed) – most recently experienced outages were a mix of planned and unplanned events
 - Most believe an outage frequency of no more than once every two or three months is acceptable
 - For most customers (59%) an outage of at least an hour has a significant impact on them
- Most customers (93%) believe it is very important that current reliability is maintained
 - Most (80%) be willing to pay an additional 3 cents each year on their electricity bill from 2021-2025 to pay for the cost of upgrading the network in their area to avoid the risk of one outage of around 54 minutes occurring over that period and most (71%) believe it is fair that all customers should pay to maintain the reliability in their area
- Prior awareness of incentive programs was moderate (55%), but following the explanation to all customers
 - Following the explanation to all customers they were generally supported in the short to medium term (by ~70% of all Doreen customers)
 - Most customers are willing to participate in a scheme simply to reduce the risk of blackouts in their area (73%) with no other incentive
- Most customers are interested in receiving information when a blackout occurs



Key findings

Issue 2:

The Customer Forum wanted to **enhance its understanding of customers' experience with rooftop solar panels, and the perceived value of metering data** to inform its negotiation positions related to AusNet Services distributed energy resources and metering proposals. This survey also provided an early opportunity to explore these issues

Key findings

- Most customers have rooftop solar panels to save money
 - 79% of Clyde North customers
 - 82% of Doreen customers
- Most customers in both locations (69%) would recommend rooftop solar panels to other residents in their area
- Customer interest in solar alerts is high
 - 87% of Clyde North customers are very interested
 - 84% of Doreen customers are very or quite interested



Key findings

Issue 3:

The Customer Forum also chose to gather broader feedback on customers' needs and satisfaction with AusNet Services than is otherwise available through AusNet Services C-Sat (customer satisfaction) program and other surveys

Key findings

- Awareness and use of the myHomeEnergy portal is limited to a small proportion of Clyde North and Doreen customers - and less than a third of those who are aware of the portal
- Consistent with various AusNet Services customer surveys reviewed by the Customer Forum, most of Clyde North and Doreen customers (76% overall) believe their electricity bill has increased over the last two years - 29% believe it has increased a little and 47% believe it has increased a lot
- 31% of Clyde North and Doreen customers believe their electricity represents poor value for money (i.e. their rating was in the range 1 to 4 out of 10) and 28% rated their electricity as poor in terms of value for money
- In relation to overall satisfaction with AusNet Services:
 - The average *overall* customer satisfaction among Clyde North and Doreen customers (excluding don't know responses) was 7.8/10
 - Overall, 97% were satisfied (i.e. their rating was in the range 5 to 10 out of 10)
 - However, overall 3% of customers were dissatisfied



Section 1: Research overview



Survey background

- In July 2018, AusNet Services presented the Customer Forum with its initial augmentation expenditure proposals. At that time AusNet Services was considering its options to improve the network in Clyde North and Doreen. These options were a trade-off between reliability and cost for customers; that is the more reliable the supply that customers expect, the greater the cost. AusNet Services intent was this cost would be borne by all customers, not just those in Clyde North and Doreen.
- The options being considered at the time included:
 - Upgrading physical assets/equipment (network infrastructure)
 - In Clyde North AusNet Services was considering an upgrade of infrastructure to improve the reliability of supply 27,310 predominantly residential (99%) customers
 - In Doreen, AusNet Services was considering the upgrade of the Doreen Zone Substation which currently supplies electricity to 27,970 predominantly residential (96%) customers
 - Alternative solutions such as:
 - Mobile power generators
 - Battery storage
 - Programs offering incentives to customers to use less power at peak times.
- Following this presentation, the Customer Forum requested further information to better understand customer expectations and preferences around these options
 - Accordingly the Customer Forum in association with AusNet Services initiated a telephone interview among customers within the areas serviced by the Clyde North and Doreen zone substations
 - The survey population was limited to residential customers, given residents account for 98% of Clyde North and 96% of Doreen customers
- The survey aimed to establish residential customers' perceptions of the reliability of their electricity supply, their future expectations and to seek their views about AusNet Services. It also explored preliminary options to cater for the anticipated increase in demand and associated price impacts



Survey background continued

The Customer Forum guided the survey objectives and design to ensure it would provide reliable and statistically valid information about customer preferences, taking into account location (metropolitan/rural and regional location), and customer type (residents and businesses)

- Field Works was commissioned to collect the data for this survey
 - Residential customer details were sourced from Sample Pages (samplepages.com.au)
 - Interviewing commenced on Monday 3 September 2018 and concluded on Friday 27 September 2019
 - Initially the aim was to survey 300 customers in each location, but this proved difficult due to an extraordinarily high non-contact rate despite rostering interviewers at different times of the day throughout the week and weekend (within industry guidelines)
 - Ultimately, after three weeks 211 interviews were completed: 101 interviews with Clyde North customers and 110 interviews with Doreen customers
- Subsequent to commissioning this survey (but prior to its completion), AusNet Services advised that it had reviewed its demand forecasts for Doreen and the proposed installation of new transformers at Doreen zone substation would be deferred out of the 2021-2025 regulatory period, whereas AusNet Services is still proposing to augment the Clyde North zone substation
- Nevertheless the findings from both locations provide valuable insight into customer perceptions and expectations, and so this report includes the findings from both locations
- Helen Bartley in her capacity as a member of the AusNet Services Customer Forum briefed the interviewers, analysed the survey data and prepared this report



Achieved sample

Location	Clyde North (n=101)	Doreen (n=110)
Owners	87%	94%
Tenants	13%	6%
Have rooftop solar panels	39%	39%
Do not have rooftop solar panels	61%	61%
Eligible to receive concessions on energy bills	38%	36%
Not eligible to receive concessions on energy bills	60%	64%
Unsure	2%	0%



Data note

- The achieved sample (as shown on page 10) over-represents customers with rooftop solar panels; given the sample estimate is 43% compared to the AusNet population figures of 22% of Clyde North residential customers and 18% of Doreen residential customers
- To correct for this potential bias, the data was subsequently weighted using AusNet Services population figures (correct as at 25 September 2019) to reflect the correct proportions of customers by according to whether or not they had rooftop solar panels.
- Total sample results are also weighted by location, given Clyde North customers account for 52% of customers across the two locations
- The sample sizes reported throughout are unweighted, reflecting the numbers of customers in each reported group who responded to the question; while all survey results hereon are weighted



Section 2: Surveyed customer profile

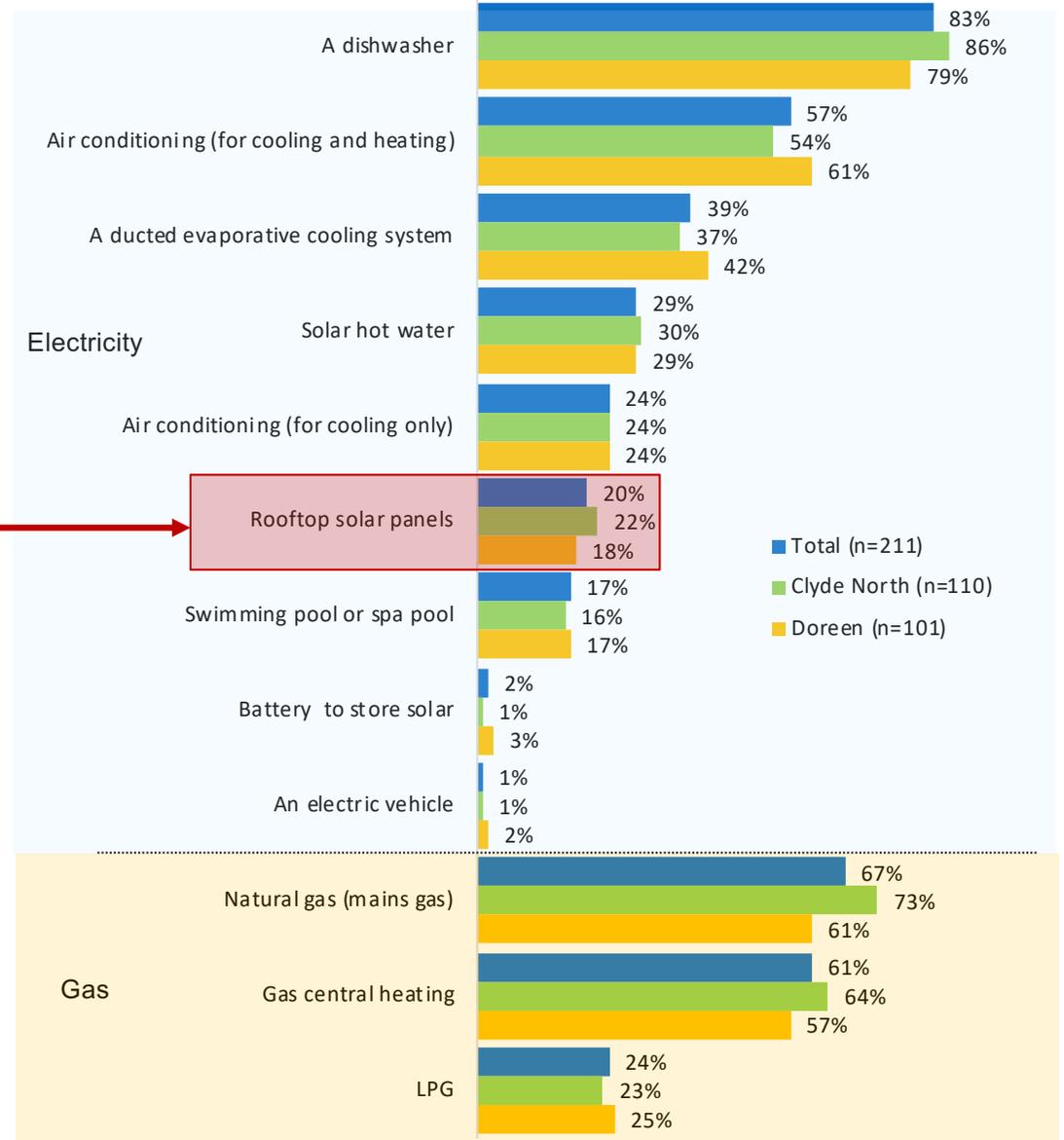


Energy appliances

Customers were asked *Which of the following do you have at your home?*

In Clyde North and Doreen most customers have:

- A dishwasher
- Air conditioning
- ***The prevalence of roof-top solar panels is a weighting variable, so as reported it merely reflects the population distribution as advised by AusNet Services***





Section 3: Outage experience



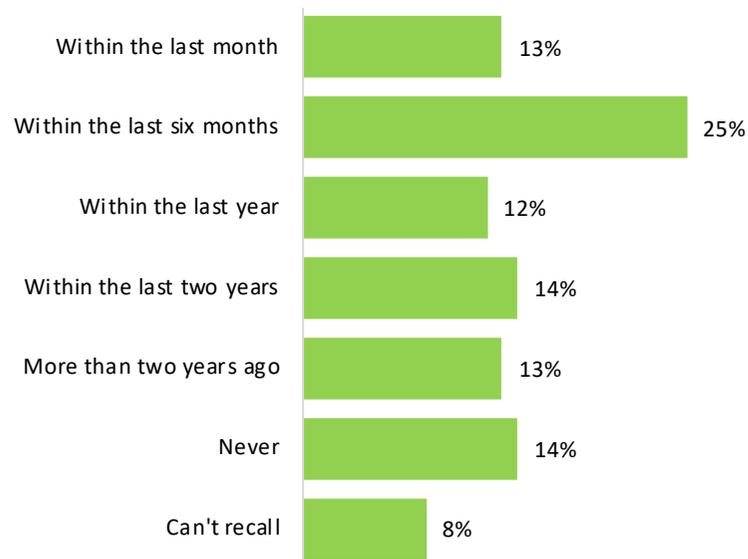
Most recent outage

All customers were asked: *How long ago was the last power outage or blackout?*

Clyde North

- 64% of Clyde North customers (n=72) indicated they had experienced a power outage or blackout within two years of the survey (i.e. between October 2016 and September 2018)
 - 13% indicated they had experience a blackout within a month of being surveyed

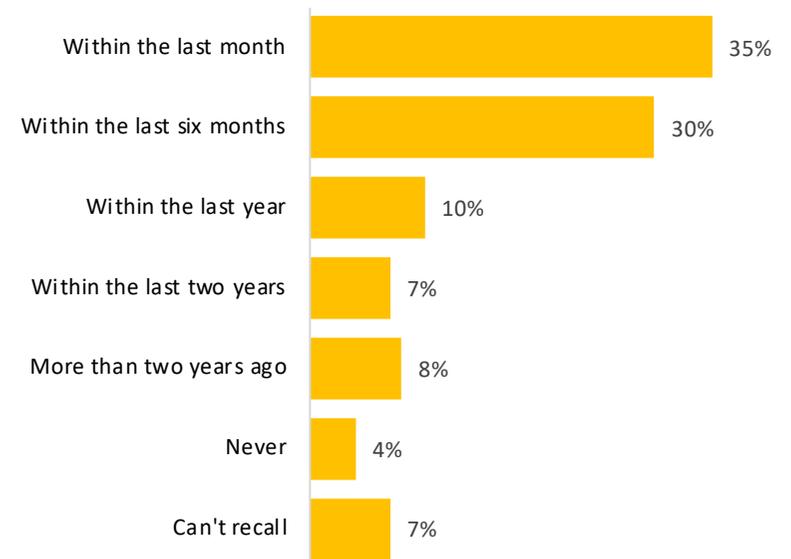
Clyde North (n=110)



Doreen

- 81% of Doreen customers (n=84) indicated they had experienced a power outage or blackout within two years of the survey (i.e. between October 2016 and September 2018)
 - 35% indicated they had experience a blackout within a month of being surveyed

Doreen (n=101)



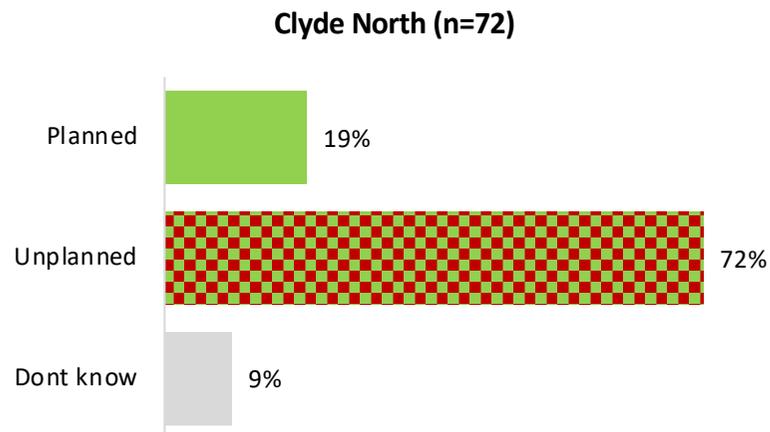


Type of outage

Customers who experienced an outage within two years of the survey were asked: *Was this [most recent outage] a planned outage where you received a letter in advance or an unplanned outage?*

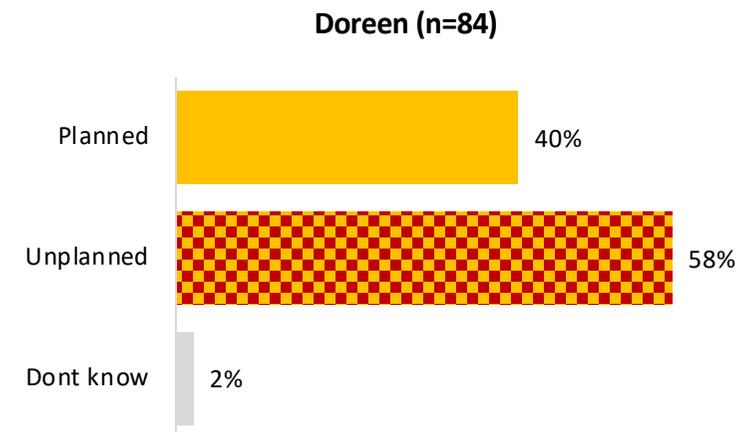
Clyde North

- 72% of Clyde North customers who had experienced an outage within two years of the survey indicated the most recent outage was unplanned
 - 19% indicated the most recent outage was planned



Doreen

- 58% of Doreen customers who had experienced an outage within two years of the survey indicated the most recent outage was unplanned
 - 40% indicated the most recent outage was planned





Frequency of outages and acceptance of frequency

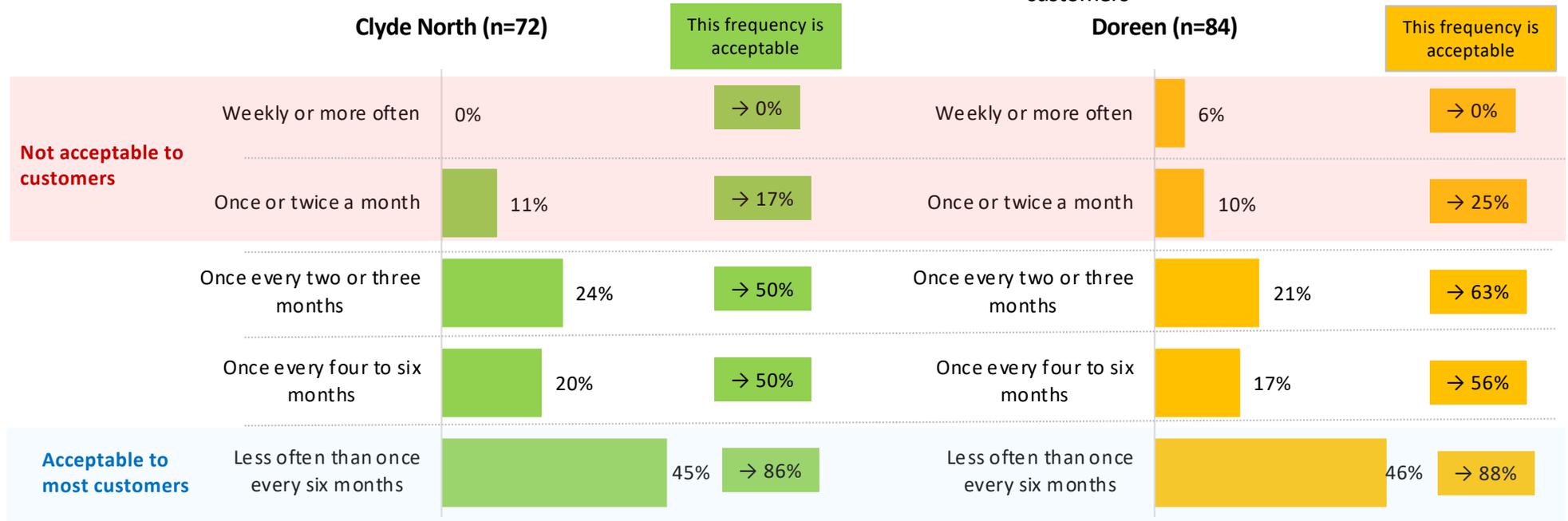
Customers who experienced an outage within two years of the survey were asked: *On average how often does your household experience power outages?* and *Is this frequency acceptable?*

Clyde North

- Overall, 61% indicated the frequency of outages was acceptable
- 35% of Clyde North customers who had experienced a power outage within two years of the survey indicated they experienced outages at least once every two months
 - This frequency is not generally acceptable to Clyde North customers

Doreen

- Overall, 68% indicated the frequency of outages was acceptable
- 37% of Doreen customers (n=84) indicated they had experienced a power outage within two years indicated they experienced outages at least once every two months
 - This frequency is not generally acceptable to Doreen customers





Outage duration that significantly affects households

Customers who experienced an outage within two years of the survey were asked: *What duration of outage has a significant impact on your household?*

Most customers (65%) indicated they can tolerate an outage of up to an hour or more without a significant impact

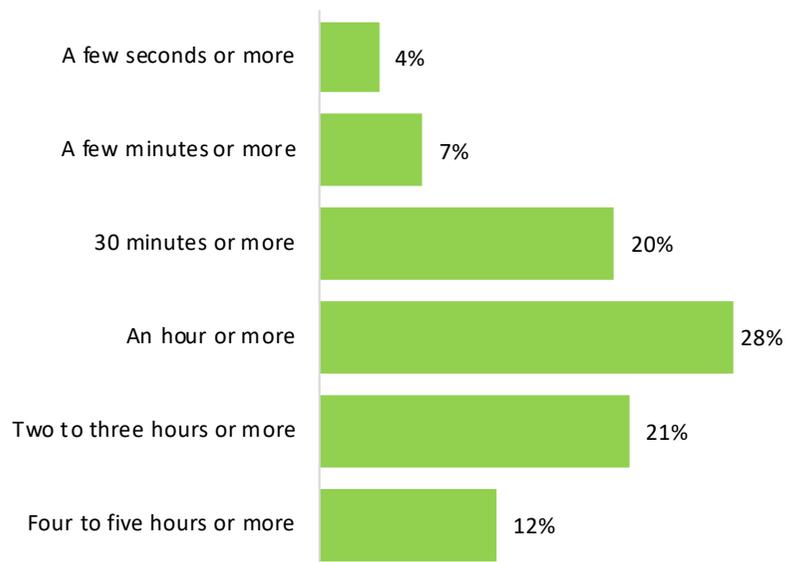
Clyde North

- 61% of Clyde North customers who had experienced an outage within two years of the survey indicated an outage of at least an hour had a significant impact on them

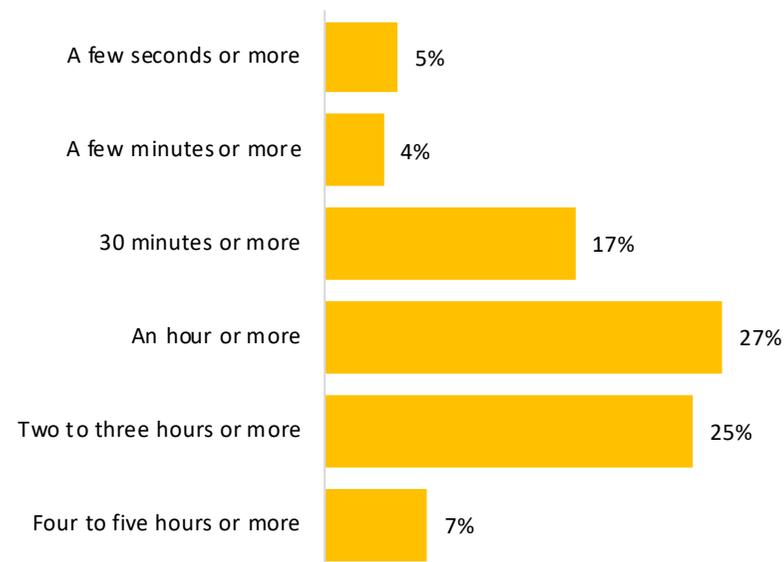
Doreen

- 59% of Doreen customers who had experienced an outage within two years of the survey indicated an outage of at least an hour had a significant impact on them

Clyde North (n=72)



Doreen (n=84)





Outage duration that significantly affects households

Customers who experienced an outage within two years of the survey were asked:
How do you respond if the outage is significant?

Clyde North

Among the 72 Clyde North customers who experienced an outage within two years of the survey, their key responses to significant outages were:

- Never had a significant outage (35%)
- Ring the power company/AusNet Services (24%)
- Do nothing/wait until it comes back on (20%)
- Have torch/candles handy (13%)
- Keep fridge closed (10%)
- Go out (6%)
- Check neighbouring properties (2%)
- Check the website/outage tracker (2%)
- Start the generator (4%)

Doreen

Among the 84 Doreen customers who experienced an outage within two years of the survey, their key responses to the outages were:

- Do nothing/wait until it comes back on (27%)
- Ring the power company/AusNet Services (24%)
- Never had a significant outage (19%)
- Have torch/candles handy (18%)
- Keep fridge closed (8%)
- Go out (8%)
- Check neighbouring properties (7%)
- Check the website/outage tracker (6%)
- Start the generator (3%)



Section 4: Demand management



Importance of maintaining current reliability

All customers were asked: *You may be aware that you live in a huge growth area, and although you currently have a reliable electricity supply, the population in your area will place pressure on the supply in the future, so AusNet Services is exploring options to ensure it can continue to provide a safe and reliable supply of electricity to your area. How important is it that the current reliability is maintained?* They were then asked: *Ignoring the cost for a minute, should AusNet Services be addressing the risk of reduced reliability in the next five years to seven years?* and *Would you be happy if they did nothing?*
Most (91%), believe AusNet services should be addressing reliability issues *in the next 5 to 7 years* – only 5% would be happy if AusNet Services did nothing

Clyde North

- All Clyde North customers believe it is important that current reliability is maintained

Clyde North (n=101)

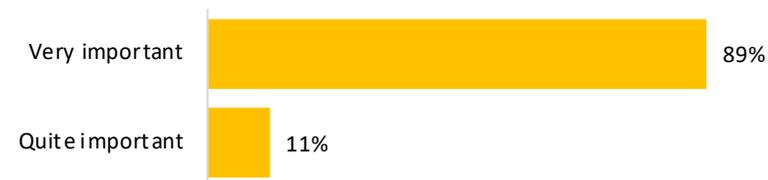


- 90% of Clyde North customers believe AusNet Services should be addressing the risk of reduced reliability in the next five years to seven years
- Only 3% of Clyde North customers would be happy if AusNet Services did nothing

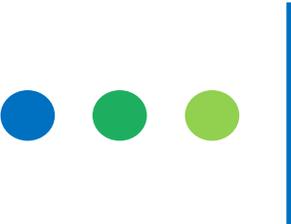
Doreen

- All Doreen customers believe it is important that current reliability is maintained

Doreen (n=110)



- 88% of Doreen customers believe AusNet Services should be addressing the risk of reduced reliability in the next five years to seven years
- Only 7% of Doreen customers would be happy if AusNet Services did nothing



Willingness to pay to maintain reliability in the future

Clyde North

All Clyde North customers were asked: *Would you be willing to **pay an additional 43 cents** each year on your electricity bill from 2021-2025 to pay for the cost of upgrading the network in your area to **avoid the risk of two outages of around 2 hours and 45 minutes occurring over that period?***

- 71% of Clyde North customers indicated they would be willing to pay

All Clyde North customers were then asked: ***All AusNet Services customers would be billed an additional 43 cents** to avoid that outage risk in your area, do you think this is fair? and *Why/Why not?**

- 71% of Clyde North customers believe **it is fair** that all customers pay to avoid the outage risk in Clyde North. They believe:
 - The amount is small/insignificant (36%)
 - It is fair everyone should pay (35%)
 - Reasonable if improved reliability is guaranteed (26%)
- 26% of Clyde North customers believe **it is not fair** that all customers pay to avoid the outage risk in Clyde North. They believe:
 - Customers are paying enough already (42%)
 - AusNet Services is a private company/earns enough already and so should fund the upgrade (35%)
- 2% were undecided

Doreen

All Doreen customers were asked: *Would you be willing to **pay an additional 3 cents** each year on your electricity bill from 2021-2025 to pay for the cost of upgrading the network in your area to **avoid the risk of one outage around 54 minutes occurring over that period?***

- 80% of Doreen customers indicated they would be willing to pay

All Doreen customers were then asked: ***All AusNet Services customers would be billed an additional 3 cents** to avoid that outage risk in your area, do you think this is fair? and *Why/Why not?**

- 75% of Doreen customers believe **it is fair** that all customers pay to avoid the outage risk in Doreen. They believe:
 - The amount is small/insignificant (38%)
 - It is fair everyone should pay (37%)
 - Reasonable if improved reliability is guaranteed (22%)
- 20% of Doreen customers believe **it is not fair** that all customers pay to avoid the outage risk in Doreen. They believe:
 - Customers are paying enough already (58%)
 - AusNet Services is a private company/earns enough already and so should fund the upgrade (42%)
- 6% were undecided

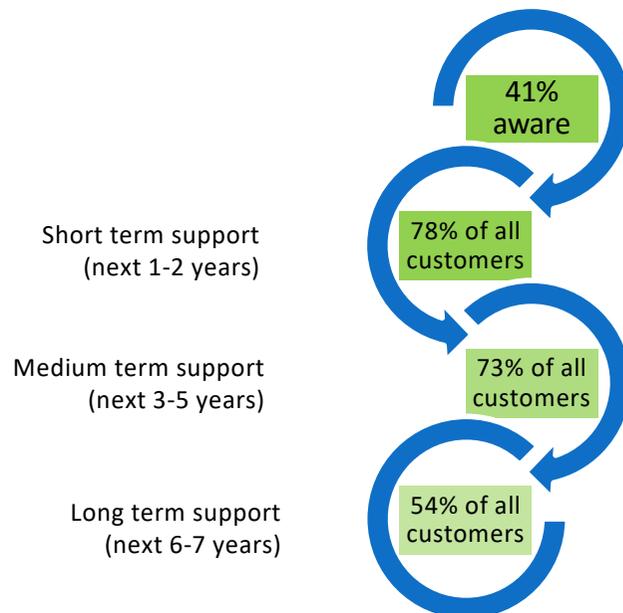


Customer interest in demand management incentives

All customers were asked: *Have you heard of programs that offer incentives to customers if they volunteer to manually turn down, turn off, or reschedule appliance use at peak times when most customers are using the most electricity, such as on days of extreme heat?* All customers, regardless of awareness were then asked: *Do you think these programs are a good idea, at least in the short term, say the next one to two years?* and *Would you support them in the medium term, say the next three to five years?* and *Would you support them in the long term, say the next six to seven years?*

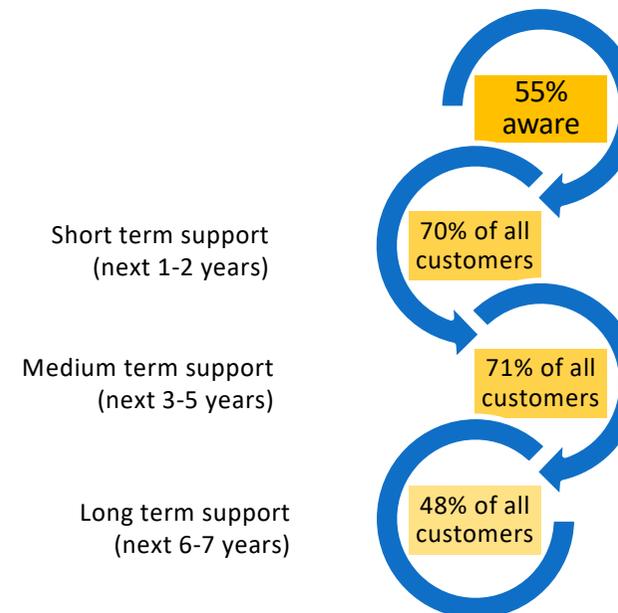
Clyde North

- Awareness of incentive programs is moderate (41% of Clyde North customers are aware)
- In the short to medium term most customers support them (>70%), but support diminishes with time



Doreen

- A slight majority of Doreen customers is aware of incentive programs (55%)
- In the short to medium term most customers support them (~70%), but support diminishes with time





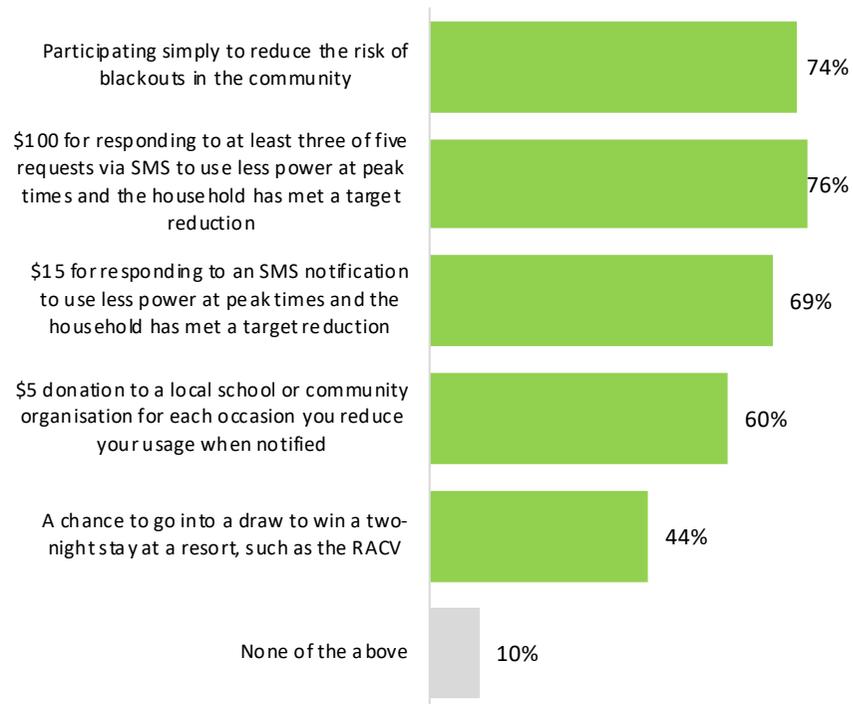
Which incentives appeal to customers

All customers were asked: *Which of the following incentives would encourage you to participate in a program like this over the next five to seven years?*

Clyde North

- Most Clyde North customers (74%) indicated a willingness to participate to simply reduce the risk of blackouts without any added incentive

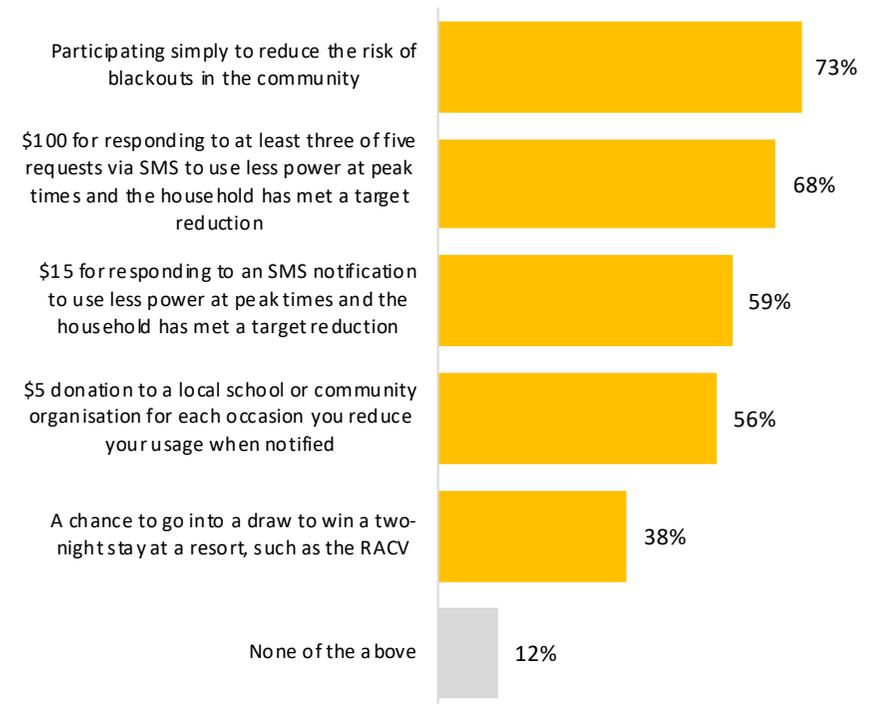
Clyde North (n=201)



Doreen

- Most Doreen customers (73%) indicated a willingness to participate to simply reduce the risk of blackouts without any added incentive

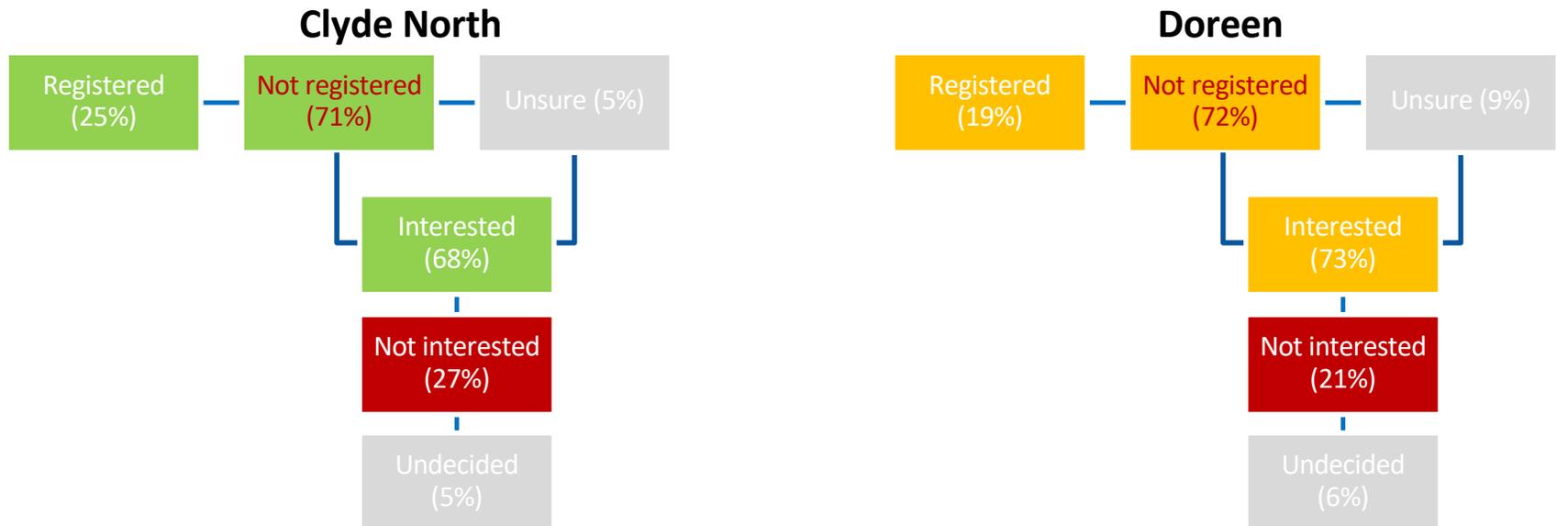
Doreen (n=210)



Customer interest in SMS alerts when a blackout occurs

All customers were asked: *AusNet Services can provide customers with an SMS alert when they have a blackout. Have you registered for this service?*

All customers were further asked: *What other information would you like to receive from AusNet Services?*



- Additionally, when asked what other information they would like to receive from AusNet Services 28% of Clyde North customers spontaneously indicated they would like to be notified about outages, including:
 - Planned outages dates and durations
 - Unplanned outages expected duration and restoration times

- Additionally, when asked what other information they would like to receive from AusNet Services 21% of Doreen customers spontaneously indicated they would like to be notified about outages, including:
 - Planned outages dates and durations
 - Unplanned outages expected duration and restoration times



Section 5: Solar customers' motivations and needs



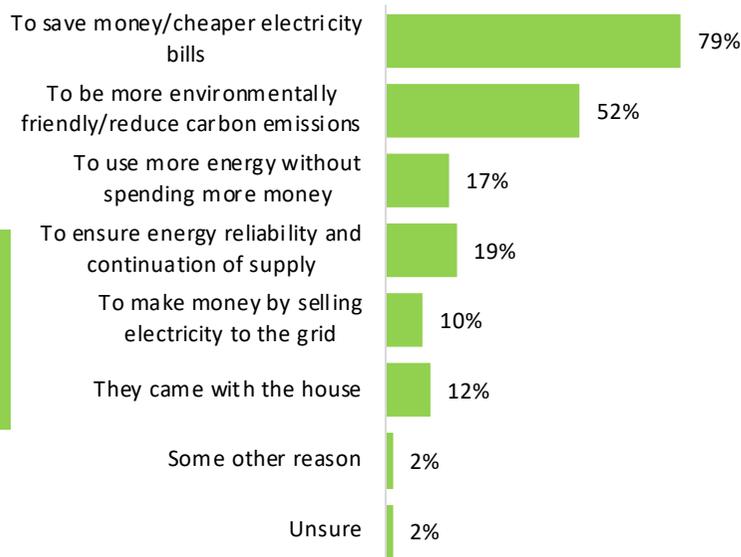
Motivation for having rooftop solar panels

Customers who have rooftop solar panels were asked: *Earlier you mentioned your household has rooftop solar panels to deliver electricity, what are the reasons for having solar?* Interviewers were instructed to record customers' unprompted answers against a list of potential responses, and they could record any other reasons not mentioned in the list

Clyde North

- Among the Clyde North customers with rooftop solar panels their key motivations to have solar were:
 - To save money (79%)
 - To be more environmentally friendly/reduce carbon emissions (52%)
- Notably, 19% had rooftop solar panels to ensure reliability and a continuous power supply

Clyde North (n=39)

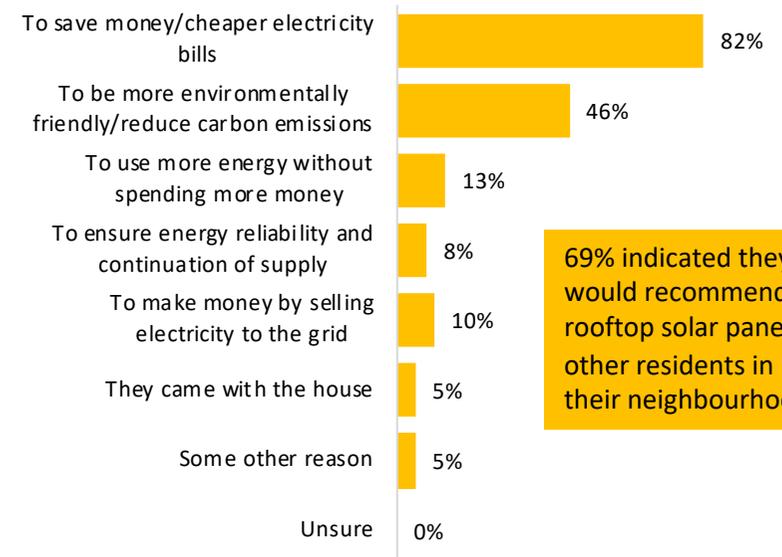


69% indicated they would recommend rooftop solar panels to other residents in their neighbourhood

Doreen

- Among the Doreen customers with rooftop solar panels their key motivations to have solar were:
 - To save money (82%)
 - To be more environmentally friendly/reduce carbon emissions (46%)
- 8% had rooftop solar panels to ensure reliability and a continuous power supply

Doreen (n=43)



69% indicated they would recommend rooftop solar panels to other residents in their neighbourhood



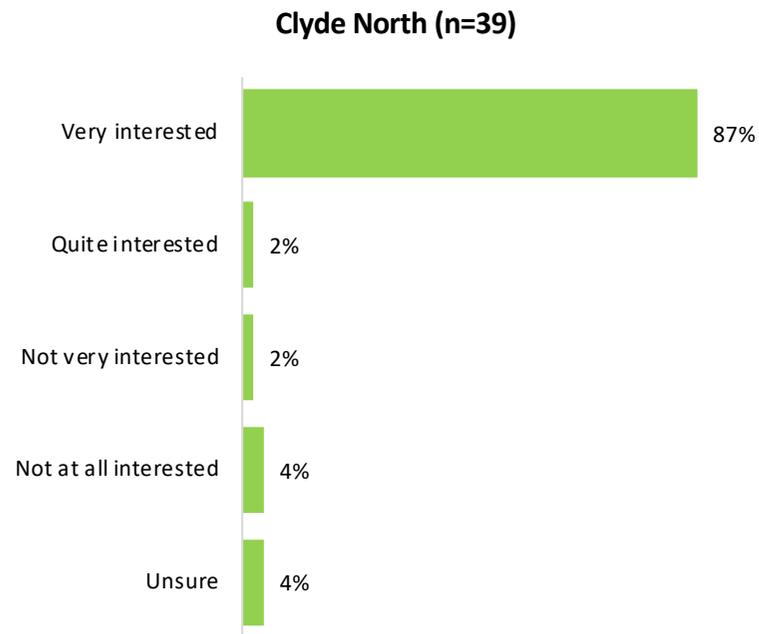
Interest in solar alerts

Customers who have rooftop solar panels were asked: *How interested would you be in receiving alerts to notify you if the solar panels you operate were not working?*

If they were interested they were asked: *What is your preferred method of receiving alerts from AusNet Services?*

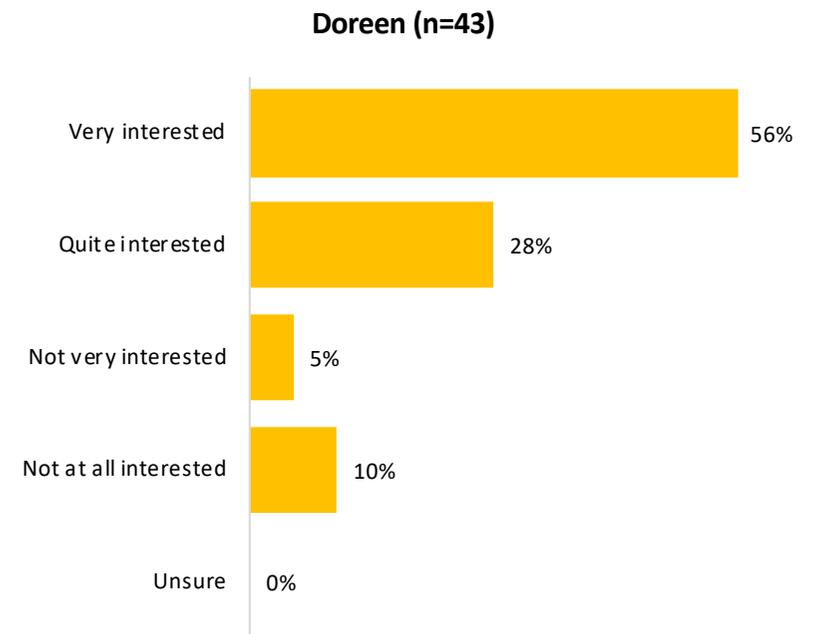
Clyde North

- Among the 39 Clyde North customers with rooftop solar, most (87%) are very interested in receiving alerts if their solar panels were not working



Doreen

- Among the 43 Doreen customers with rooftop solar, most (83%) are very or quite interested in receiving alerts if their solar panels were not working





Section 6: Monitoring energy use



Awareness and use of myHomeEnergy

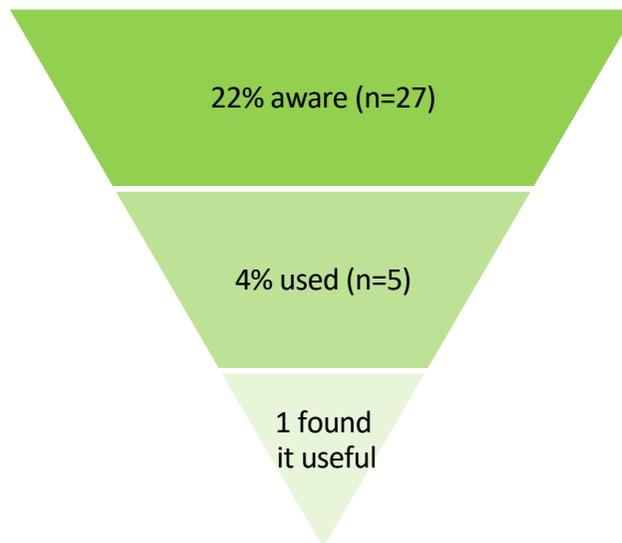
All customers were asked: *Are you aware of the AusNet Services myHomeEnergy web portal that you can use to obtain information about your electricity usage?*

If they were aware of myHomeEnergy they were asked: *Have you ever used the portal?*

If they had used myHomeEnergy they were asked: *Was it useful?*

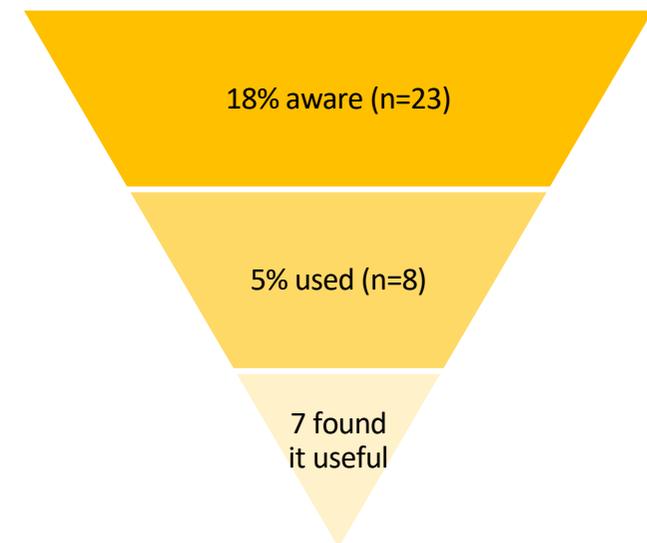
Customers who were not aware of myHomeEnergy/ or were aware but had not used it were asked: *Would you be interested in using a web-portal, like myHomeEnergy, to access data that tells you about your electricity usage?*

Clyde North



52% of the 60 Clyde North customers who had not used it were interested in using a web-portal, like myHomeEnergy, to access data that tells you about your electricity usage

Doreen



47% of the 44 Doreen customers who had not used it were interested in using a web-portal, like myHomeEnergy, to access data that tells you about your electricity usage



Section 7: General perceptions of AusNet Services



Bill perceptions

All customers were asked: *Over the last two years do you feel your electricity bills have ... decreased a lot, decreased a little, stayed about the same, increased a little, increased a lot?*

Then they were asked: *Before today, were you aware that part of your electricity bill is for the cost of being connected to the electricity grid, and part relates to the amount of electricity that you use?*

- Most Clyde North and Doreen residential customers who were surveyed (76% overall) believe their electricity bill has increased over the last two years
 - Overall, 29% believe it has increased a little
 - Overall, 47% believe it has increased a lot
- Most customers are aware that part of your electricity bill is for the cost of being connected to the electricity grid, and part relates to the amount of electricity that you use

Perception of electricity bill over last two years	Total sample (n=211)	Clyde North (n=101)	Doreen (n=110)
Decreased a lot	2%	2%	3%
Decreased a little	5%	7%	4%
Stayed the same	13%	15%	10%
Increased a little	29%	28%	30%
Increased a lot	47%	44%	51%
Unsure	3%	4%	3%
	↓	↓	↓
Aware bill composition	81%	83%	79%



Affordability

All customers were asked: *If 1 is poor and 10 is excellent, overall, how do you rate your electricity in terms of value for money?* and *If 1 is poor and 10 is excellent, overall, how do you rate your electricity in terms of affordability?* with the order randomised between survey participants

- Although on average customers rated the value for money as 5.3 out of 10, and affordability as 5.0 out of 10, when the percentages are considered it is clear a significant proportion of rate their electricity as:
 - Poor value for money (31% overall)
 - Poor on affordability (38% overall)
- Clyde North customers were relatively more likely to give poor ratings (between 1 and 4 out of 10), than Doreen customers

	Total sample (n=211)	Clyde North (n=101)	Doreen (n=110)
Perceived value for money			
Average rating	5.3	5.2	5.2
Poor (1 to 4/10)	31%	35%	25%
Satisfactory (5 or 6/10)	34%	37%	42%
Good (7 or 8/10)	27%	29%	25%
Excellent (9 or 10/10)	4%	3%	4%
Don't know	5%	5%	4%
Perceived affordability			
Average rating	5.0	5.0	5.1
Poor (1 to 4/10)	38%	42%	33%
Satisfactory (5 or 6/10)	34%	28%	41%
Good (7 or 8/10)	42%	24%	23%
Excellent (9 or 10/10)	4%	5%	3%
Don't know	1%	1%	0%



Customer service

All customers were asked: *Before today were you aware that AusNet Services is the sole distributor, responsible for operating and maintaining the electricity network, being the poles and wires in your area?*

They were then asked: *In the last two years have you contacted AusNet Services?*

And: *If 1 is poor and 10 is excellent, overall, how do you rate the quality of customer service you received from AusNet Services?*

- Most Clyde North and Doreen customers are aware AusNet Services is their sole distributor (81%, n=170)
- Of these 170 customers, 25% indicated they had contact with AusNet Services in the past two years
- Although on average customers rated their customer service experience as 7.2 out of 10, 12% of customers rated their experience as poor (1 to 4 out of 10)
 - Doreen customers were relatively more likely to rate the service as poor(19%) (between 1 and 4 out of 10), than Clyde North customers (5%)

	Total sample (n=211)	Clyde North (n=101)	Doreen (n=110)
Aware AS is customers' sole electricity distributor	81%	79%	83%
Contact with AS in last 2 years	25%	23%	26%
	↓	↓	↓
Performance	Total sample (n=55)	Clyde North (n=26)	Doreen (n=29)
Average rating	7.2	7.5	7.0
Poor (1 to 4/10)	12%	5%	19%
Satisfactory (5 or 6/10)	11%	15%	9%
Good (7 or 8/10)	51%	59%	44%
Excellent (9 or 10/10)	22%	15%	29%
Don't know	4%	7%	0%



Overall customer satisfaction

All customers were asked: *If 1 corresponds to extremely dissatisfied and 10 corresponds to extremely satisfied, overall how satisfied are you with AusNet Services as the distributor of electricity in your area?*

- The average customer satisfaction rating (excluding don't know responses) was 7.8/10
- Overall, 97% of Clyde North and Doreen customers were satisfied (i.e. their rating was in the range 5 to 10 out of 10)
 - Overall 3% of Clyde North and Doreen customers were dissatisfied
- The Customer Forum notes AusNet Services enthusiastic reporting of averages in its Monthly C-Sat Updates
 - However it is concerned an *average* in isolation conveys limited information about customers' satisfaction, and says nothing about the spread of satisfaction results
 - In particular it conceals the fact that a considerable proportion of customers are dissatisfied with the service, and this should be acknowledged and monitored

Performance	Total sample (n=211)	Clyde North (n=101)	Doreen (n=110)
Average rating	7.8	7.8	7.8
Dissatisfied (1 to 4/10)	3%	5%	2%
Moderately satisfied (5 or 6/10)	17%	18%	16%
Quite satisfied (7 or 8/10)	45%	41%	50%
Very satisfied (9 or 10/10)	34%	37%	32%
Don't know	0%	0%	0%



Factors affecting satisfaction

All customers who provided a valid satisfaction rating (i.e. excluding customers who responded don't know) were asked:
What is the most important factor that affects your satisfaction?

- The key factor across all customer groups was having a reliable power supply/no outages (mentioned by 79% of customers)
 - This proportion may be inflated given the dominant subject of this survey related to reliability and power outages, and should therefore be considered with caution
- Price of electricity was the key factor affecting the satisfaction of 23% of customers
- Communication around outages was the key factor affecting the satisfaction of 4% of customers