Residential Survey Phase 2 Results

Prepared for: CitiPower
November 2017

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CitiPower Residential Survey Results
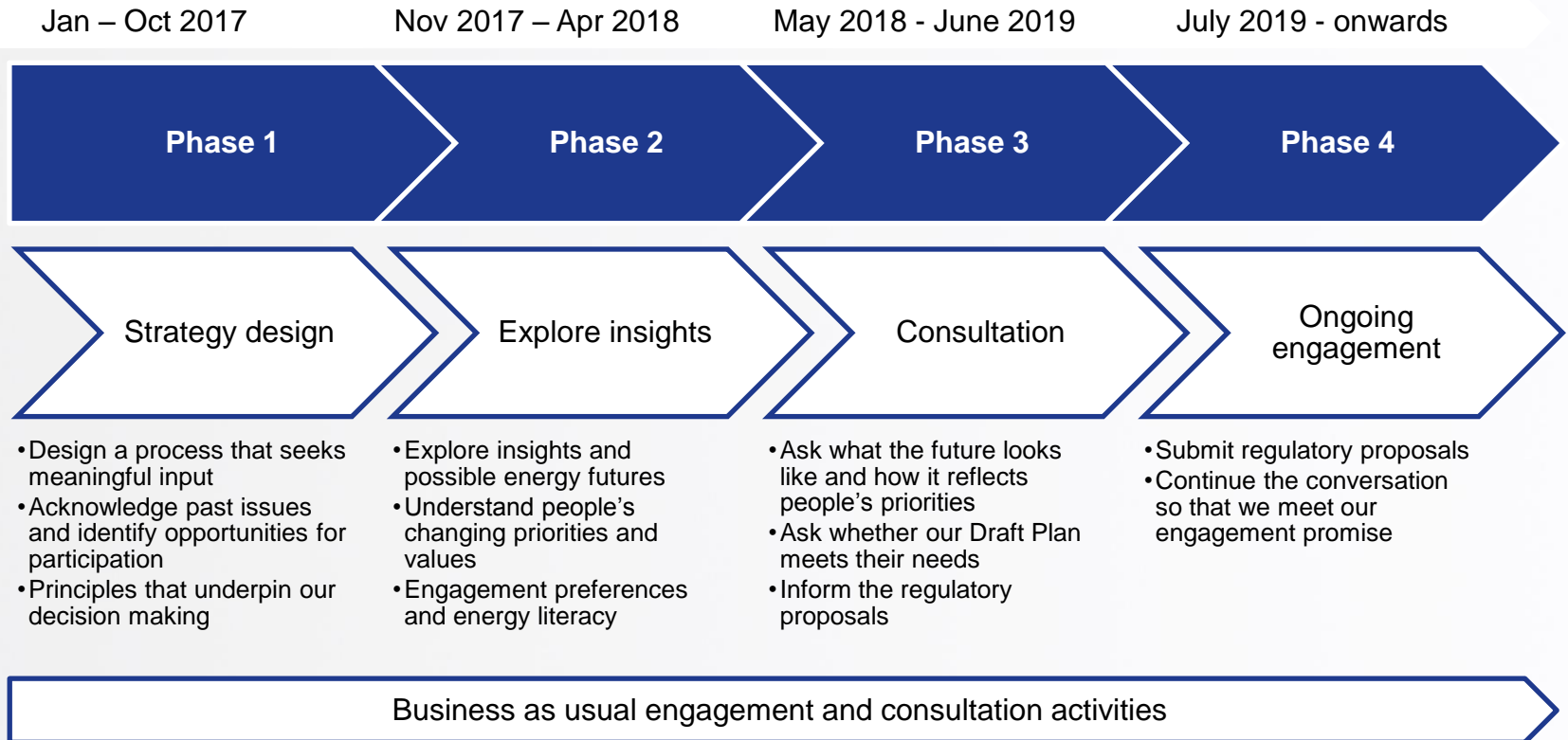# Contents

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Approach

Background and context

- CitiPower is required to provide a regulatory proposal to the AER every five years, detailing its predicted expenditure and revenue requirements over the regulatory period.

- CitiPower is currently developing its regulatory proposal to the AER for the 2021-2025 regulatory period.

- To help shape this regulatory proposal, CitiPower is keen to further understand the priorities and concerns of its customers.

- Woolcott Research and Engagement has been commissioned to conduct customer and stakeholder engagement to input into the preparation of the regulatory proposal.
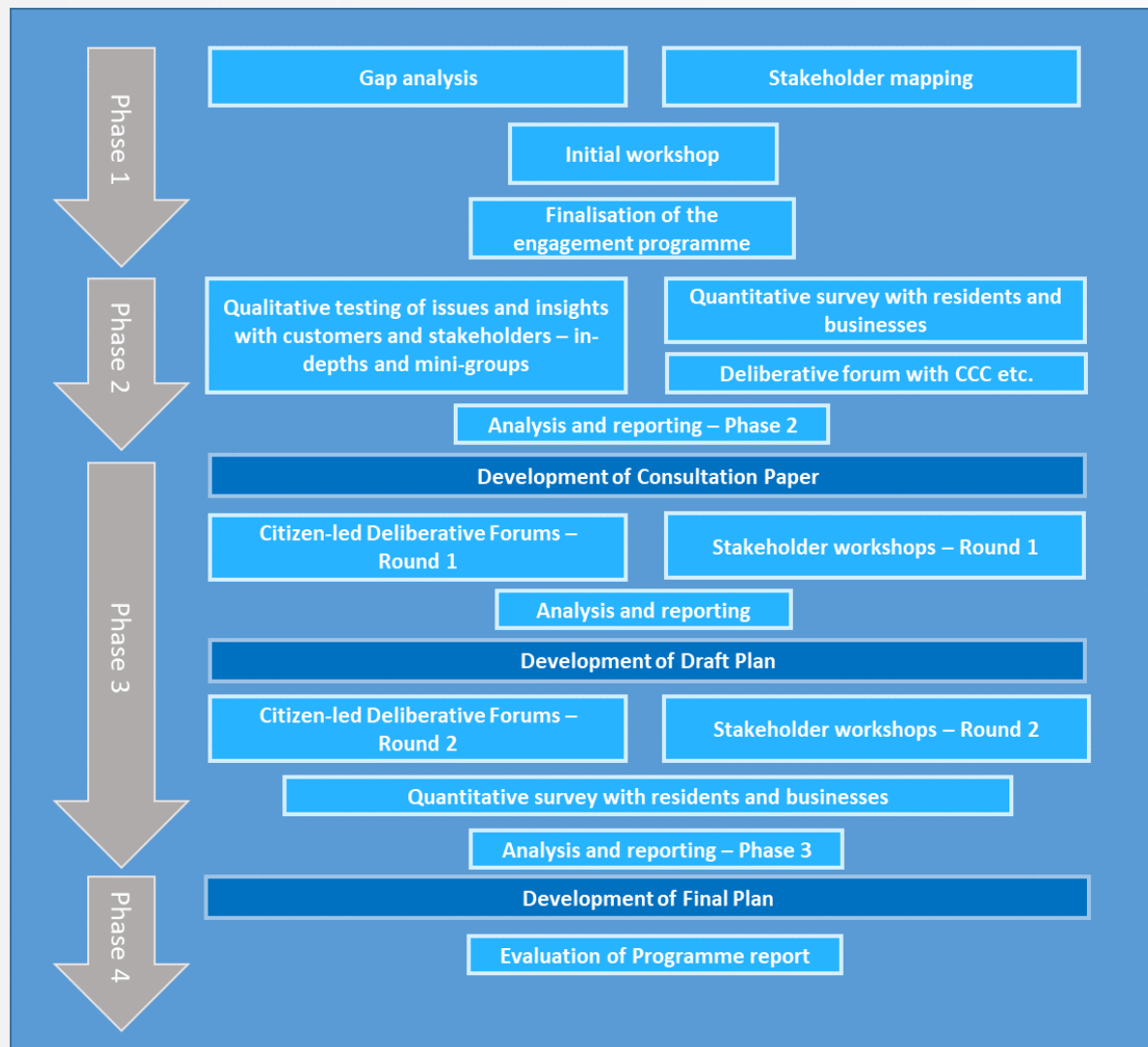

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Engagement program

We are currently in phase 2 of the program

Jan – Oct 2017	Nov 2017 – Apr 2018	May 2018 - June 2019	July 2019 - onwards
Phase 1	**Phase 2**	**Phase 3**	**Phase 4**
Strategy design	Explore insights	Consultation	Ongoing engagement

- Design a process that seeks meaningful input
- Acknowledge past issues and identify opportunities for participation
- Principles that underpin our decision making

- Explore insights and possible energy futures
- Understand people's changing priorities and values
- Engagement preferences and energy literacy

- Ask what the future looks like and how it reflects people's priorities
- Ask whether our Draft Plan meets their needs
- Inform the regulatory proposals

- Submit regulatory proposals
- Continue the conversation so that we meet our engagement promise

Business as usual engagement and consultation activities

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Research methodology

Phase 1

- Gap analysis
- Stakeholder mapping
- Initial workshop
- Finalisation of the engagement programme

Phase 2

- Qualitative testing of issues and insights with customers and stakeholders – in-depths and mini-groups
- Quantitative survey with residents and businesses
- Deliberative forum with CCC etc.
- Analysis and reporting – Phase 2

Phase 3

- Development of Consultation Paper
- Citizen-led Deliberative Forums – Round 1
- Stakeholder workshops – Round 1
- Analysis and reporting
- Development of Draft Plan
- Citizen-led Deliberative Forums – Round 2
- Stakeholder workshops – Round 2
- Quantitative survey with residents and businesses
- Analysis and reporting – Phase 3

Phase 4

- Development of Final Plan
- Evaluation of Programme report

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Key Findings

Key findings

Awareness and Values

- Awareness of CitiPower and its role is low, significantly so amongst 18-34 year olds, compared with those aged 65+ who are significantly more familiar.

- The most valued role of a distributor was seen to be reliability of supply in both an prompted and unprompted sense. When asked for current levels of satisfaction with reliability, 57% of residents offered a score of 9-10/10 for this attribute.

  o Only 1 in 5 residents were accepting of a reduction in their energy bill for a lower level of reliability (22%), this was significantly lower amongst those ages 55+ years.

Pricing

- The majority pay between $50-$150/month for their electricity bill, with nearly half of residents (49%) indicating they would reduce their energy consumption during peak times for a $2 rebate.

- There was a preference for pricing to remain the same throughout the day (47%), except amongst those aged 65+ who were significantly more likely to prefer variable pricing (49%).

- Two-thirds of residents thought it fair that prices should remain the same across urban and rural areas, and there was a strong agreement that connection costs should be paid by individuals.

- Four in five residents indicated they would like to learn more about pricing.

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Key findings

The Future and Renewable Energy

- The majority of CitiPower residents (42%) preferred the 'Green Power' future scenario.

- There is a willingness (60%) to pay a small increase for more renewable energy resources, as well as safeguarding the network against extreme weather.

- Those aged 55 and over are very conscious of electricity usage and reduce as much as possible (64%), as opposed to 54% of 18-34 year olds who indicated they were poor at actively reducing how much they use, with money being the biggest incentive to adopt energy efficiency measures (86%). These measures used include:

  o Finding alternatives to cooling/heating

  o Energy efficient lighting and appliances

  o Home insulation

- Residents were strongly in favour of home solar panel installation (76%) – with 10% indicating they had these installed – as well as large-scale renewables used by the electricity network (67%) and electric vehicles and infrastructure (58%).

  o Intention to adopt measures in the future was significantly higher amongst 18-34 year olds, and those who intended to adopt indicated a timeframe of 3-5 years.

- While only 38% indicated interest in community education programs, 18-34 year olds were significantly more likely to be interested in this topic (48%).

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Residential Survey Methodology

Methodology

- The survey was conducted primarily online with some CATI top up.

- N=640 completes were obtained.

- The online respondents were sourced through an online panel provider, used solely for research purposes.

- The survey was live from 16/10/2017 to 31/10/2017

- Data was weighted during the analysis by age and gender to reflect the CitiPower area.

- Throughout the presentation figures in **bold green** are significantly higher than the total and figures in **bold red** are significantly lower than the total.
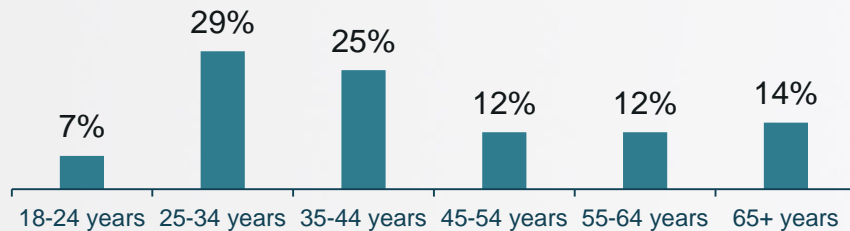
The survey covered the following areas:

- Knowledge and literacy
- Energy values
- Energy behaviours
- Network performance
- Pricing
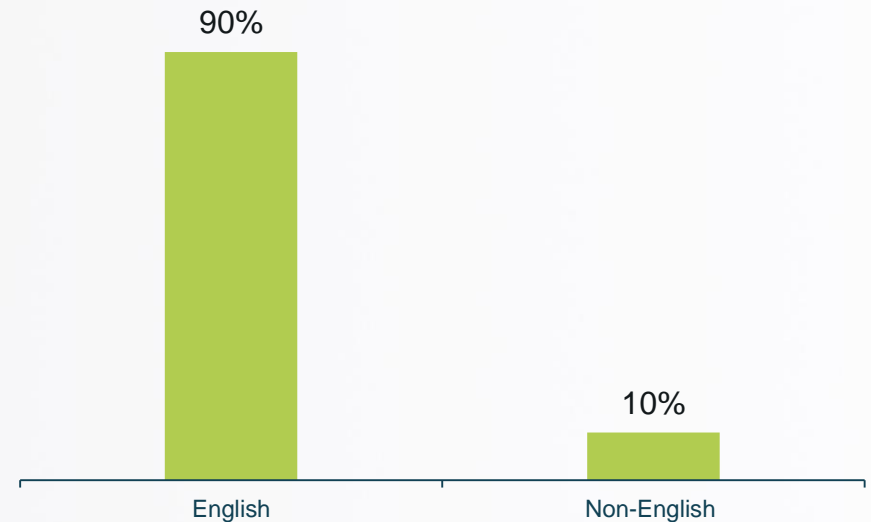- Connections
- Community engagement

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Participant Profile

Participant profile

Age breakdown

Age group	Percentage
18-24 years	7%
25-34 years	29%
35-44 years	25%
45-54 years	12%
55-64 years	12%
65+ years	14%

CALD – English v non-English

	Percentage
English	90%
Non-English	10%

Q1 Which of the following age groups best describes you?
Q6. What is the main language spoken at home?
Base All respondents n=640

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Participant profile

Residential status e.g. tenant, home owner etc.
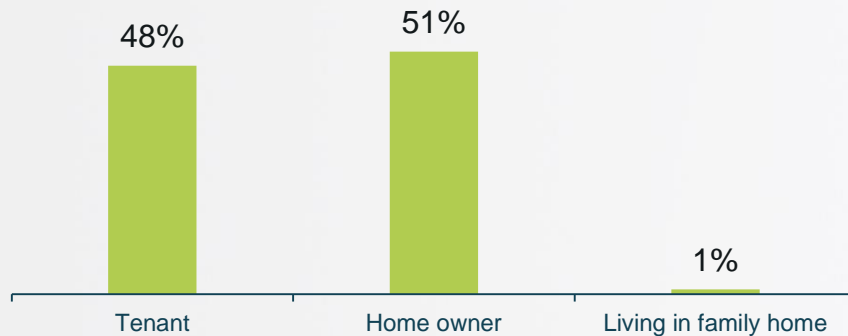
Household make up e.g. single, couple etc.

48% Tenant
51% Home owner
1% Living in family home

29% Single household
33% Couple living together with no children
10% Shared household
26% Family household with children still at home
0% Single Parent

Q37.. Thinking about the home you currently live in, are you a...
Q44. Which of the following best describes your household make up?
Base All respondents n=640

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Participant profile

Income

| Under $20,000	$20,000-$59,999	$60,000-$99,999	$100,000-$149,999	$150,000 plus	Prefer not to answer
4%	19%	28%	24%	13%	12%
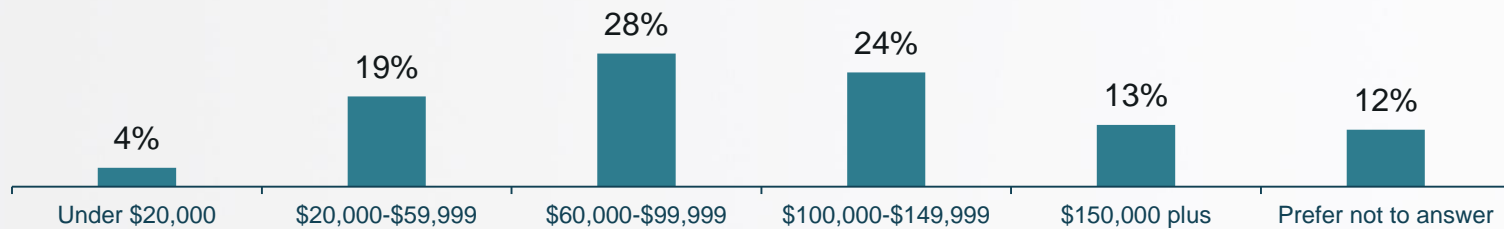
Q40. Which of the following categories best describes the income before tax of the highest earner in your household?
Base All respondents n=640
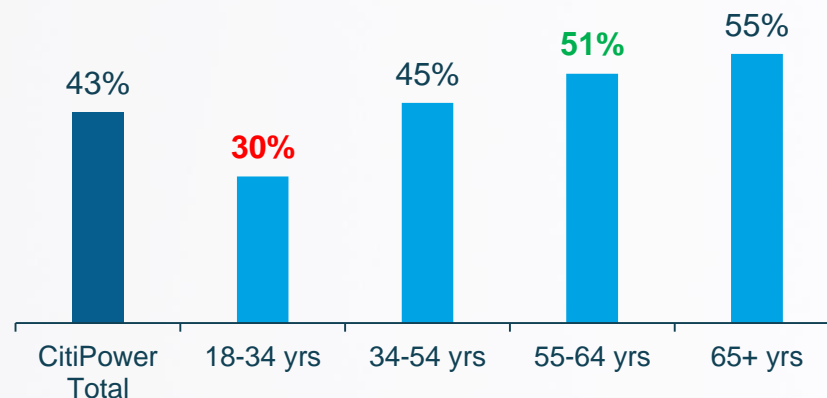
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Knowledge and Literacy

Two thirds understood the difference between the role of a retailer and distributor, younger people less so. Over half didn't know the name of their distributor (70% of young people)

Understanding of the difference between retailer and distributor

	CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
	64%	54%	66%	76%	74%
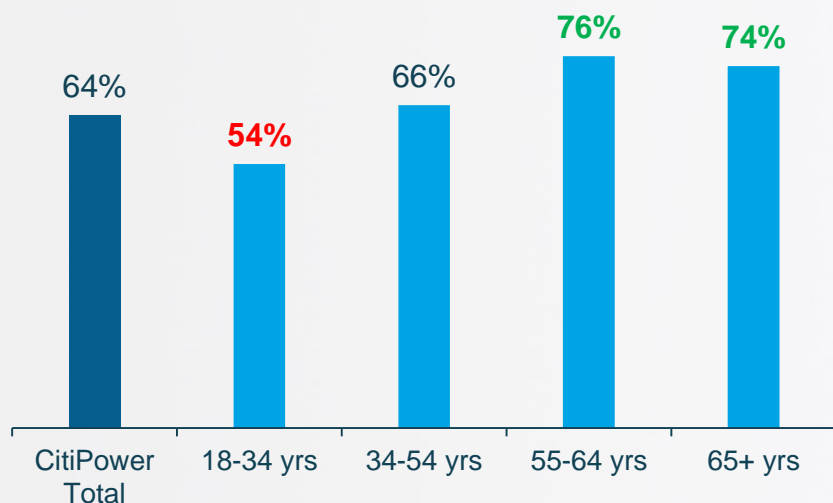
Knowledge of electricity distributor

	CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
	43%	30%	45%	51%	55%

Q8. Do you feel you have a good understanding of the difference between an electricity distributor and electricity retailer?
Q9. What is the name of your electricity distributor? By distributor, we mean the company responsible for the electricity network not your energy retailer who sends you the bill.
Base All respondents n=640

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The key roles of a distributor were perceived to be the maintaining the poles and wires, responding to interruptions, and connecting electricity to homes. Younger people were far less familiar with the role of a distributor.

Perceived role of a distributor

Perceived roles	CitiPower Total (n=408) %	18-34 yrs (n=112) %	35-54 yrs (n=157) %	55-64 yrs (n=67) %	65+ yrs (n=72) %
Maintaining electricity poles and wires	77	64	79	86	93
Responding to electricity outages and interruptions	75	59	78	82	94
Getting electricity to your home	73	61	76	82	79
Connecting electricity to new homes	58	47	53	71	81
Maintaining and operating street lighting	61	51	63	69	70
Long term planning to ensure a resilient electricity supply	57	39	60	67	76
Trimming vegetation around powerlines	50	34	46	75	72
None of the above	6	9	4	4	3

Q10. [insert distributor] is the electricity distributor for your area. Which of the following roles were you aware that [insert distributor] did before today?
Base Respondents who indicated they knew the difference between a retailer and distributor n=408

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Energy Values

Reliability of supply and affordability were by far the most important to residents with reliability being particularly important for older people.

Top three things most valued by residents

Values	CitiPower Total (n=640) %	18-34 yrs (n=185) %	35-54 yrs (n=227) %	55-64 yrs (n=106) %	65+ yrs (n=122) %
Reliability/consistent supply	77	71	79	80	87
Price/low cost/value	71	71	74	71	66
Customer service	14	15	18	13	5
Sustainability/eco friendly	13	15	11	20	11
Safety	12	11	14	14	8
Fast response to supply issues/problems	11	7	8	21	18
Efficiency	6	8	6	5	2
No spikes/surges	5	5	3	5	9
Good discounts/ loyalty programs	4	5	4	3	2
Connectivity/access	4	7	2	3	-
Other	21	21	22	18	19
Don't know/not answered	5	5	5	3	5

Q11. First of all, when you think about your electricity supply, what are the three things you value most (or are the most important to you)?
Base All respondents n=640

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In a prompted sense, reliability of supply and affordability again emerged as the key important values. Of least importance was increasing customer participation and choice.

Importance of values
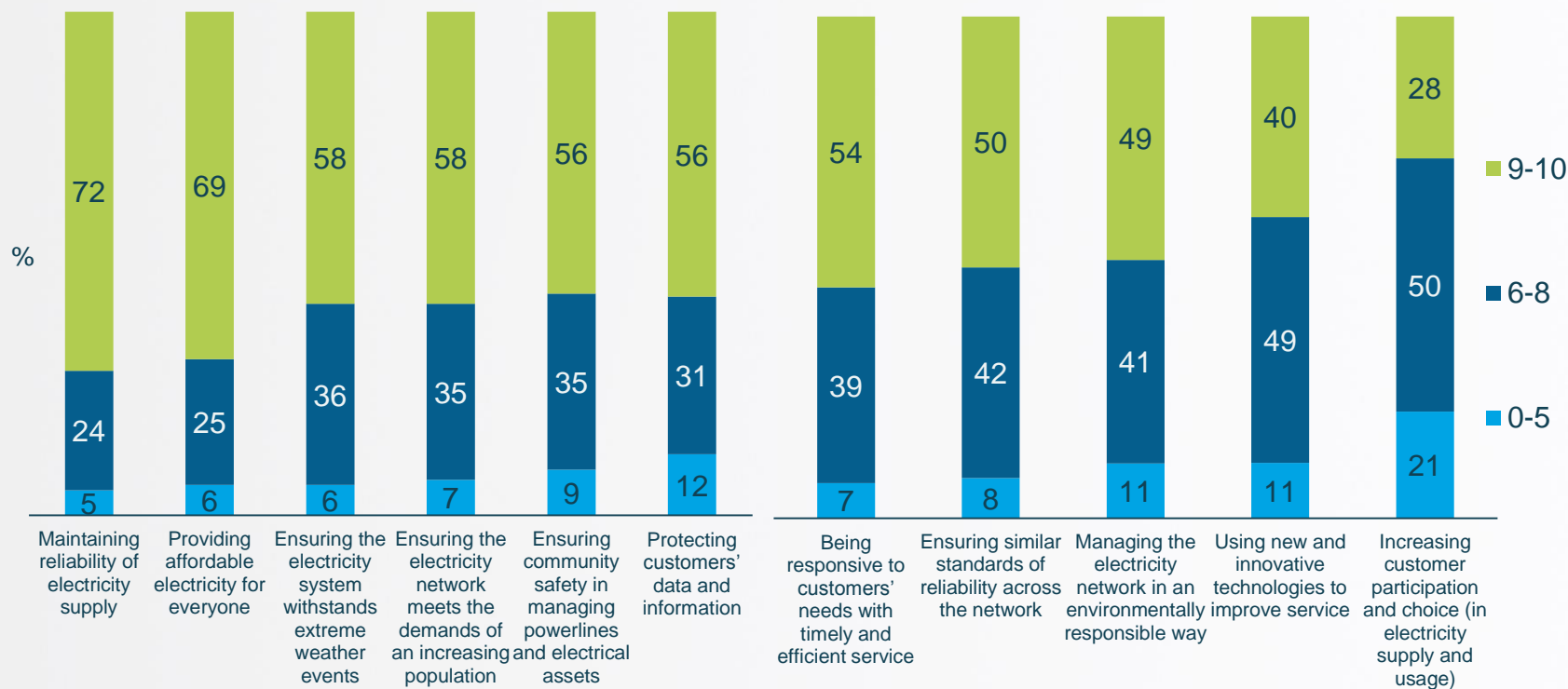
Value	0-5	6-8	9-10
Maintaining reliability of electricity supply	5	24	72
Providing affordable electricity for everyone	6	25	69
Ensuring the electricity system withstands extreme weather events	6	36	58
Ensuring the electricity network meets the demands of an increasing population	7	35	58
Ensuring community safety in managing powerlines and electrical assets	9	35	56
Protecting customers' data and information	12	31	56
Being responsive to customers' needs with timely and efficient service	7	39	54
Ensuring similar standards of reliability across the network	8	42	50
Managing the electricity network in an environmentally responsible way	11	41	49
Using new and innovative technologies to improve service	11	49	40
Increasing customer participation and choice (in electricity supply and usage)	21	50	28

%

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In the CitiPower area there was a preference for the Green Power scenario, however the split increased towards Steady State amongst older participants.

Most preferred future scenario
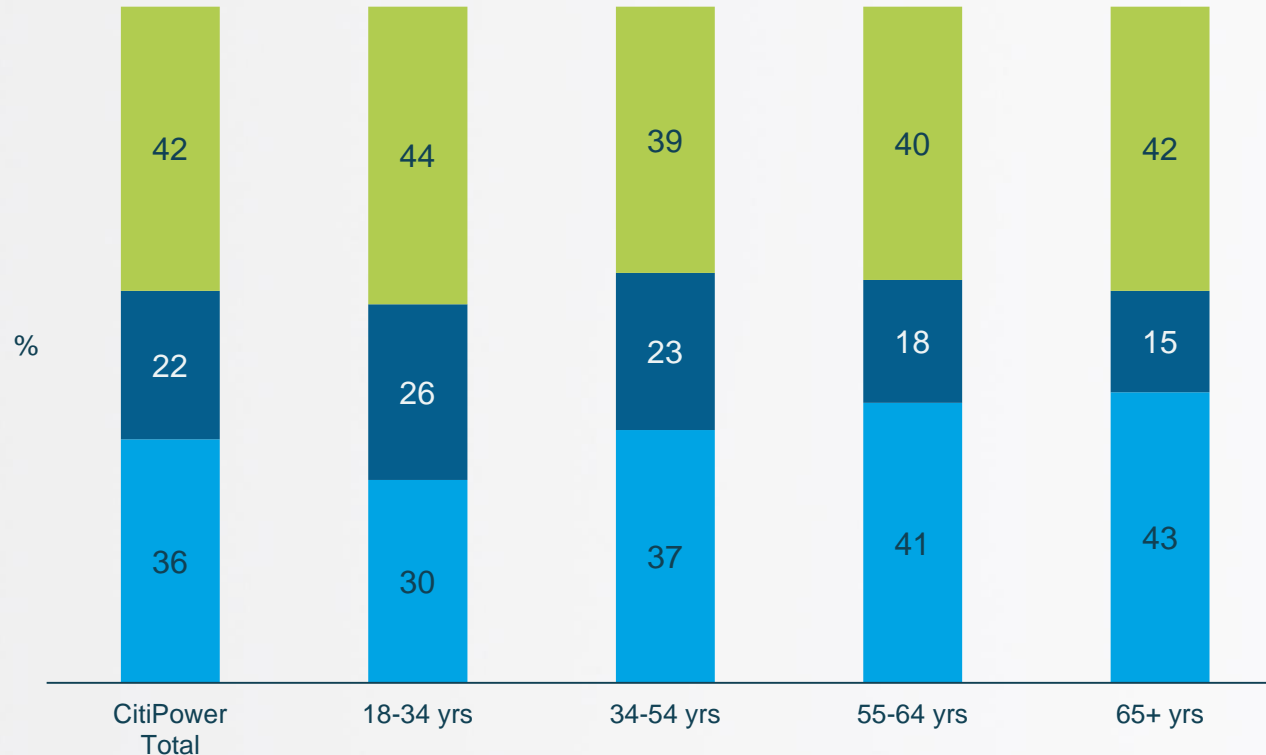
Green Power

Consumer Power

Steady State

%

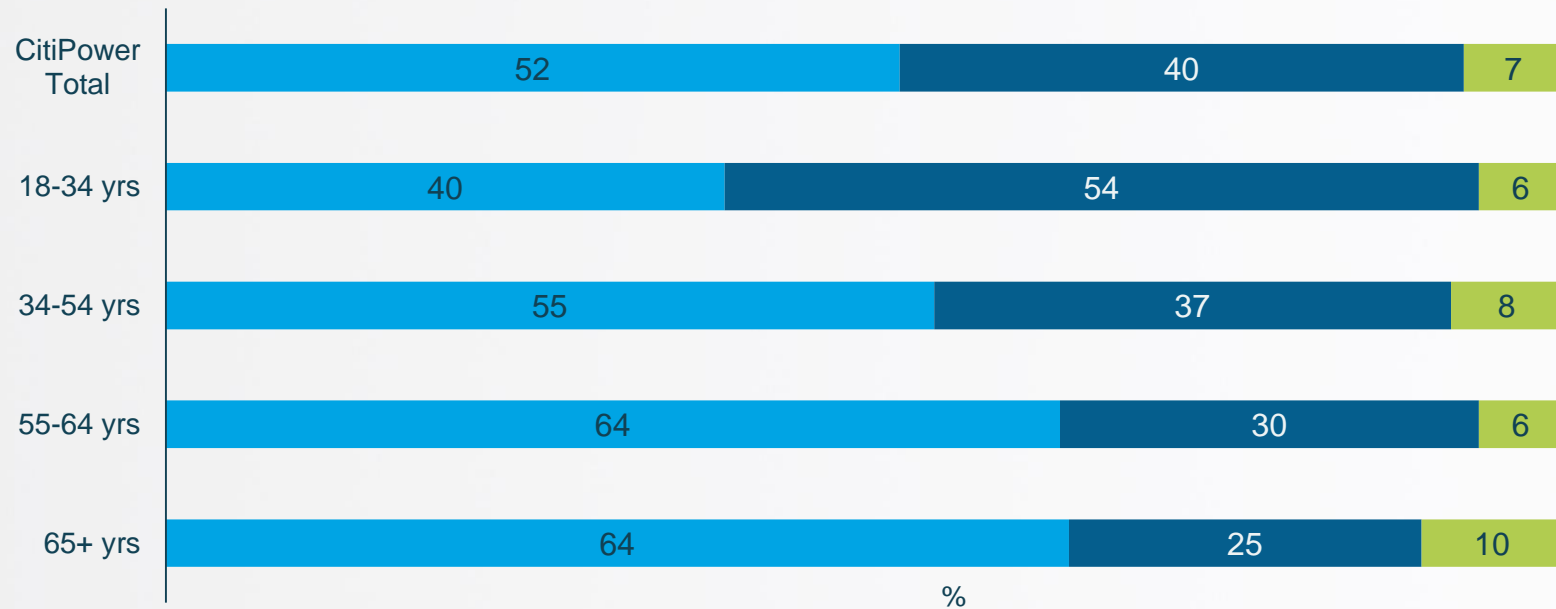|	CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
Green Power	42	44	39	40	42
Consumer Power	22	26	23	18	15
Steady State	36	30	37	41	43

Q13. Below are three possible future scenarios for electricity distributors for the next 10 to 15 years After you have read through them, could you indicate which would be your first choice (1), which would be your second choice (2) and which would be your least preferred option (3).
Base All respondents n=640

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Energy Behaviours

Over half of customers were very conscious of their electricity usage, especially those over 55 years. Younger residents were worst at implementing energy saving behaviours.

Attitude toward electricity

- We are very conscious of how much electricity we use and try to reduce our usage as much as possible
- We try to be conscious of how much electricity we use, however we are poor at actively reducing how much we use
- We do not consciously monitor how much electricity we use, and do not try to actively reduce how much we use

	Very conscious	Try to be conscious	Do not monitor
CitiPower Total	52	40	7
18-34 yrs	40	54	6
34-54 yrs	55	37	8
55-64 yrs	64	30	6
65+ yrs	64	25	10

%

Q14. How would you describe your household's attitude towards electricity?
Base All respondents n=640

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The most common electricity saving behaviours were finding alternatives to heating/ cooling and using energy efficient lighting and appliances.

Adoption of energy efficiency measures

Energy efficiency measures	CitiPower Total (n=640) %	18-34 yrs (n=185) %	35-54 yrs (n=227) %	55-64 yrs (n=106) %	65+ yrs (n=122) %
Finding alternatives to cooling/heating (such as opening windows or using blankets)	67	64	65	73	73
Installing energy efficient lighting	62	**47**	61	**81**	**86**
Purchasing energy efficient appliances	60	**48**	61	**76**	**75**
Home insulation to reduce your energy reliance	34	**18**	31	**57**	**61**
Turning appliances etc off at the wall	3	2	3	5	2
Turning off lights not in use	1	-	1	2	**4**
Using solar	1	-	1	1	**4**
Rarely/not using heating/cooling	-	-	-	**2**	1
Use electricity off peak	-	-	-	1	-
None	8	9	9	5	3

Q15. Which of the following energy efficiency measures does your household adopt?
Base All respondents n=640

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The main motivation to adoption of energy efficient measures was to save money.

Reasons for adopting energy efficiency measures

Reasons for adopting energy efficiency measures	CitiPower Total (n=640) %	18-34 yrs (n=185) %	35-54 yrs (n=227) %	55-64 yrs (n=106) %	65+ yrs (n=122) %
To save money	86	83	90	86	81
To lower our carbon footprint	53	52	50	61	57
Through education / habit	37	35	32	40	**49**
To reduce usage at peak times	25	23	25	26	29
Other	-	-	-	-	1

Q16. Why do you adopt energy saving behaviours?
Base Respondents who indicated they adopted at least one of the energy saving methods n=640

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Individual solar panels were the most favoured technology for adoption, followed by large scale renewables on the network.

Favourable technological and behavioural network adoptions

76%	Solar panels on homes
67%	Large-scale renewables used on the electricity network for generation
58%	Electric vehicles and infrastructure
47%	Residential batteries
45%	Large batteries on the electricity network
44%	Decreasing demand during peak times
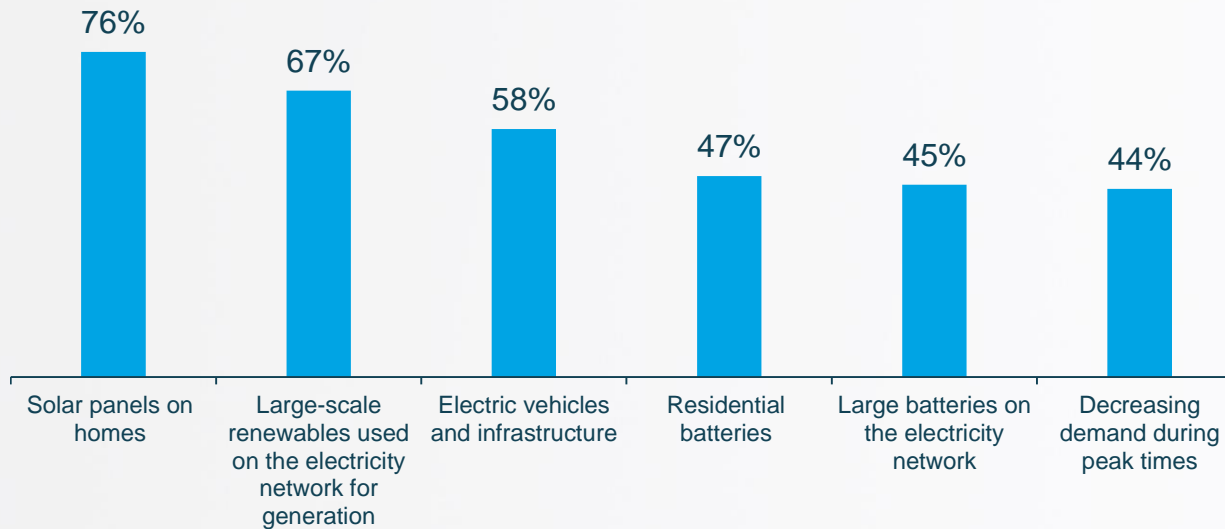
Q17. Looking at the following technological and behavioural options below, how much are you in favour of the adoption of them in the electricity network:
Base All respondents n=640

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Those between 35-64 years were significantly more likely to have no green energy solutions in place.

Energy efficient solutions currently in place within the household

Legend:
- None of the above
- Solar panels
- A central system that manages your power and appliances
- Batteries for storing electricity
- Electric vehicle(s)

%

	CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
None of the above	81	70	87	89	84
Solar panels	10	15	8	7	7
A central system that manages your power and appliances	7	9	5	3	9
Batteries for storing electricity	4	9	1	2	1
Electric vehicle(s)	4	8	1	1	2

Q18. Does your household currently have any of the following:
Base All respondents n=640

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Installing solar panels was likely amongst nearly a third of those who had not yet invested in them. Intention to adopt many of these measures was significantly higher amongst 18-34 year olds.

Intention of green energy adoption

Likelihood of installing various green energy measures	CitiPower Total %	18-34 yrs %	35-54 yrs %	55-64 yrs %	65+ yrs %
Install solar panels	30	**38**	27	26	23
Purchase an electric vehicle(s)	27	**38**	27	19	**11**
Purchase a battery	25	24	28	22	23
Install a central system that manages your power and appliances	23	**33**	21	16	**9**

Q19. How likely would your household be in the future to….
Base Respondents who did not have the green energy option already (Bases vary)

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In the next five years more than two thirds of respondents intend to have invested in a green energy initiative.

Timeframe for intended green energy adoption
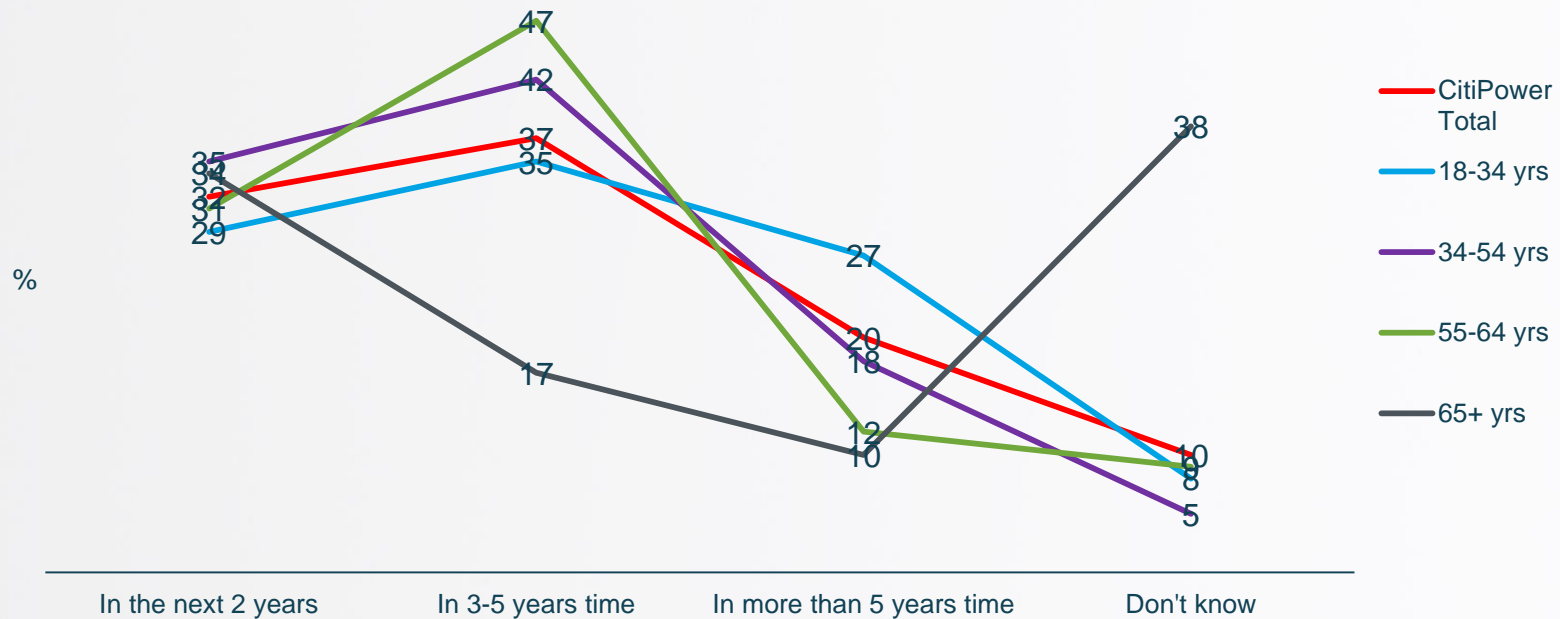
Legend:
- CitiPower Total (red)
- 18-34 yrs (blue)
- 34-54 yrs (purple)
- 55-64 yrs (green)
- 65+ yrs (dark grey)

%

	In the next 2 years	In 3-5 years time	In more than 5 years time	Don't know
CitiPower Total	32	37	20	10
18-34 yrs	29	35	27	8
34-54 yrs	35	42	18	5
55-64 yrs	31	47	12	9
65+ yrs	34	17	10	38

Q20. How likely would your household be in the future to….
Base Respondents who did not have the green energy option already and were likely to purchase in the future
n= 311

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Saving money was the biggest incentive for likely installation of green technology. 55-64 year olds are also interested in selling back to the grid.

Reason for being likely to invest in green energy technology

Reason for intention to install various green energy measures	CitiPower Total %	18-34 yrs %	35-54 yrs %	55-64 yrs %	65+ yrs %
To save money	77	72	81	81	81
It is more sustainable	70	69	66	78	82
To be more self-sufficient	53	47	55	57	69
To sell electricity back to the grid	27	20	30	**43**	34
Other	1	3	-	-	-

Q21. And for which of the following reasons would your household be likely to invest in these technologies?
Base Respondents who did not have the green energy option already and were likely to purchase in the future n= 311

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Network Performance

Quality of supply and reliability were rated the most positively. Those over 65 tended to be most satisfied overall.

Satisfaction with distributor performance

	Overall performance	Quality of supply (e.g. no flickering lights or power surges)	Reliability (number and duration of outages you experience)	The ability of the network to withstand extreme weather events	Safety of powerlines (e.g. reducing the risk of bushfires)	Operation and maintenance of street lighting	Trimming vegetation around powerlines	Providing access to data to monitor my usage
9-10	42	58	57	46	43	41	35	26
6-8	51	37	38	45	48	51	52	52
0-5	7	5	6	8	9	9	12	22

Q22. Thinking about all that your network distributor does, could you please rate your satisfaction with their performance using a score out of 10, where 10 is the highest and 0 is the lowest, on the following factors. For example, how satisfied are you with [insert network] in terms of:
Base All respondents n=640

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Only 1 in 5 respondents indicated they would accept a trade off of reliability for savings. This was significantly higher amongst 18-34yr olds (32%) and significantly lower for those aged over 55 years.

Acceptance of trading off reliability for a reduction in electricity costs

CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
22%	32%	21%	9%	7%
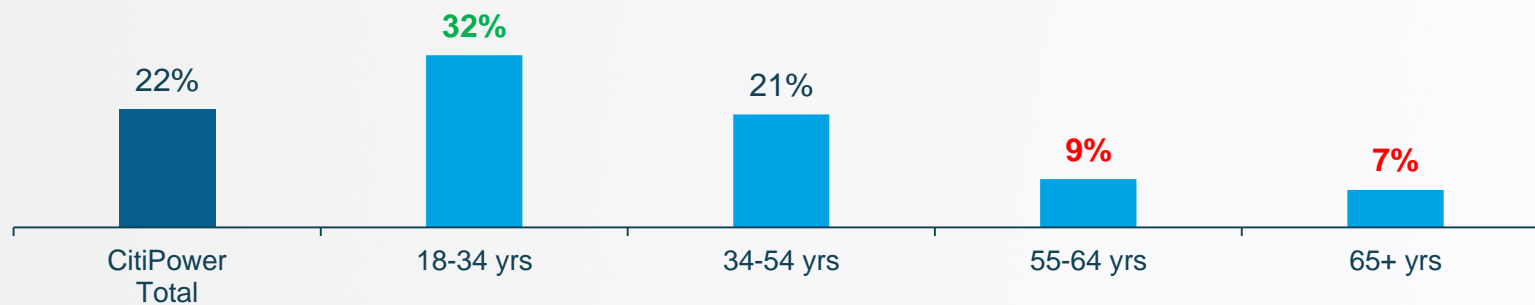
Q23. In principle, would you be willing to accept a lower level of reliability (for example, more or longer outages or more flickering power) if it meant a reduction in your electricity bill?
Q25. Which of the following price ranges does your typical electricity bill fall per month?
Base All respondents n=640

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Pricing

The majority pay between $50-$150/month for their electricity bill.

Cost of Monthly Electricity Bill

■ Under $50 ■ $50-$99 ■ $100-$149 ■ $150-$199 ■ $200+ ■ Don't know

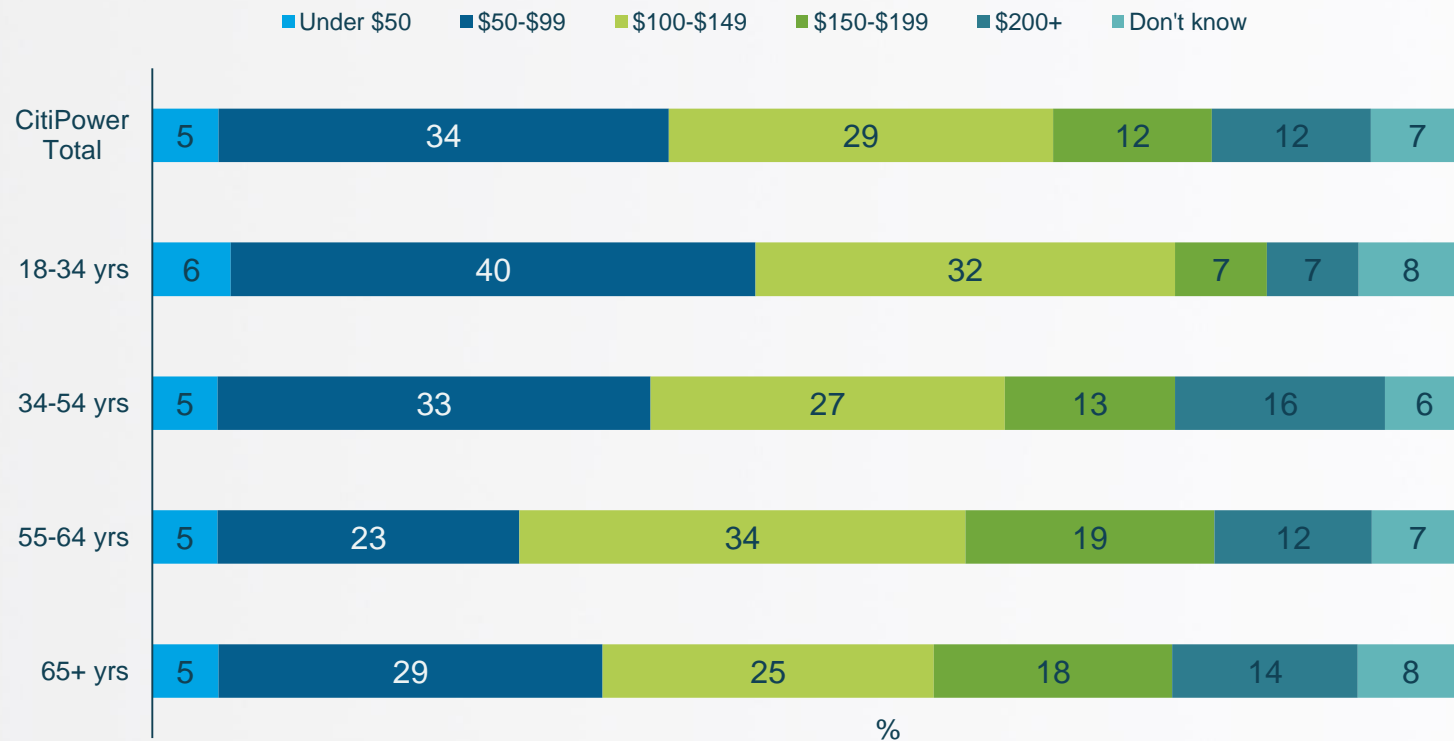|	Under $50	$50-$99	$100-$149	$150-$199	$200+	Don't know
CitiPower Total	5	34	29	12	12	7
18-34 yrs	6	40	32	7	7	8
34-54 yrs	5	33	27	13	16	6
55-64 yrs	5	23	34	19	12	7
65+ yrs	5	29	25	18	14	8

%

Q25. Which of the following price ranges does your typical electricity bill fall per month?
Base All respondents n=640

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Most did not have difficulty paying their electricity bill, with the 65+ age group having the least difficulty.

Incidence of Difficulty Paying Electricity Bill

CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
17%	16%	20%	22%	**7%**

Q26. Have you ever had difficulty paying your electricity bills?
Base All respondents n=640

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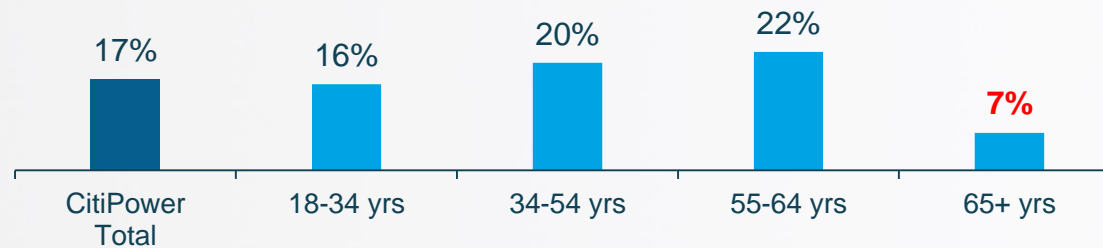
18-34 year olds drove the call for prices to stay the same throughout the day, however those over 65 years were significantly more likely to prefer variable pricing.
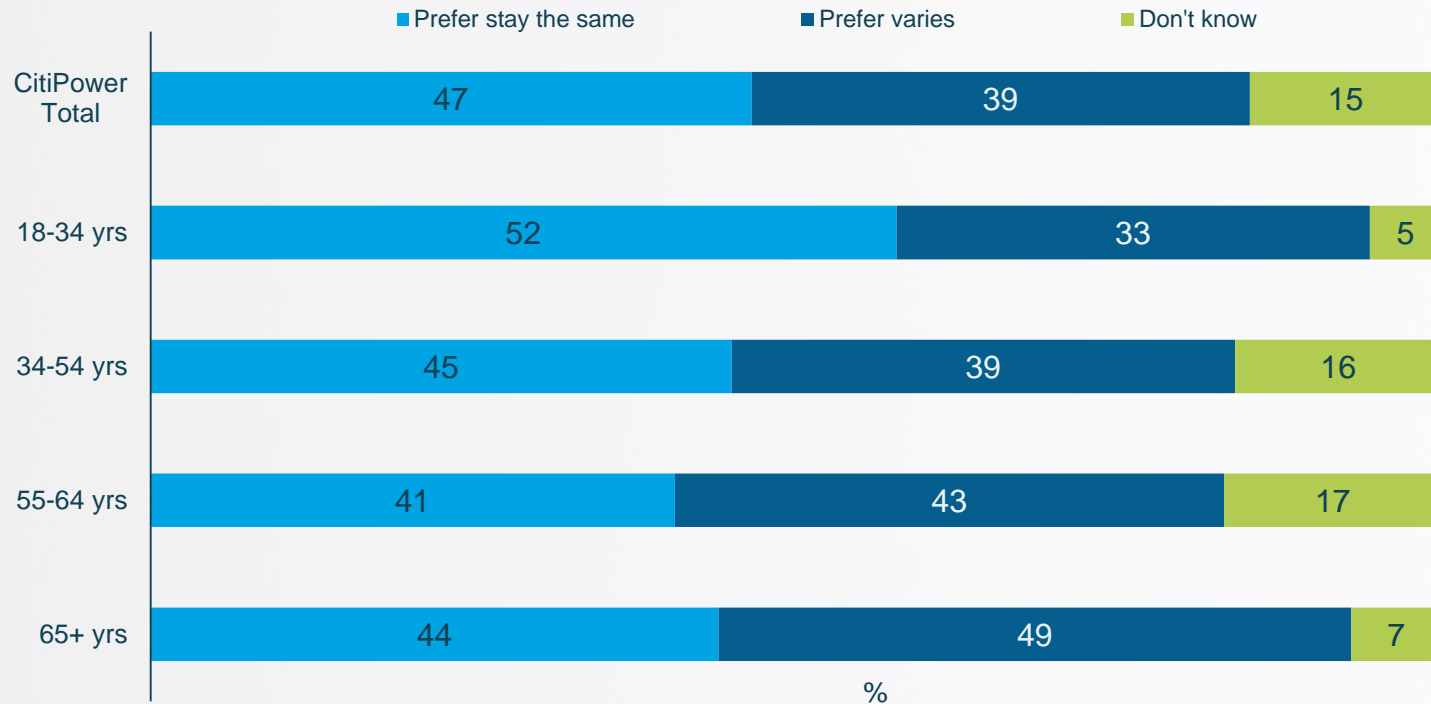
Time of Use Pricing Preferences

■ Prefer stay the same ■ Prefer varies ■ Don't know

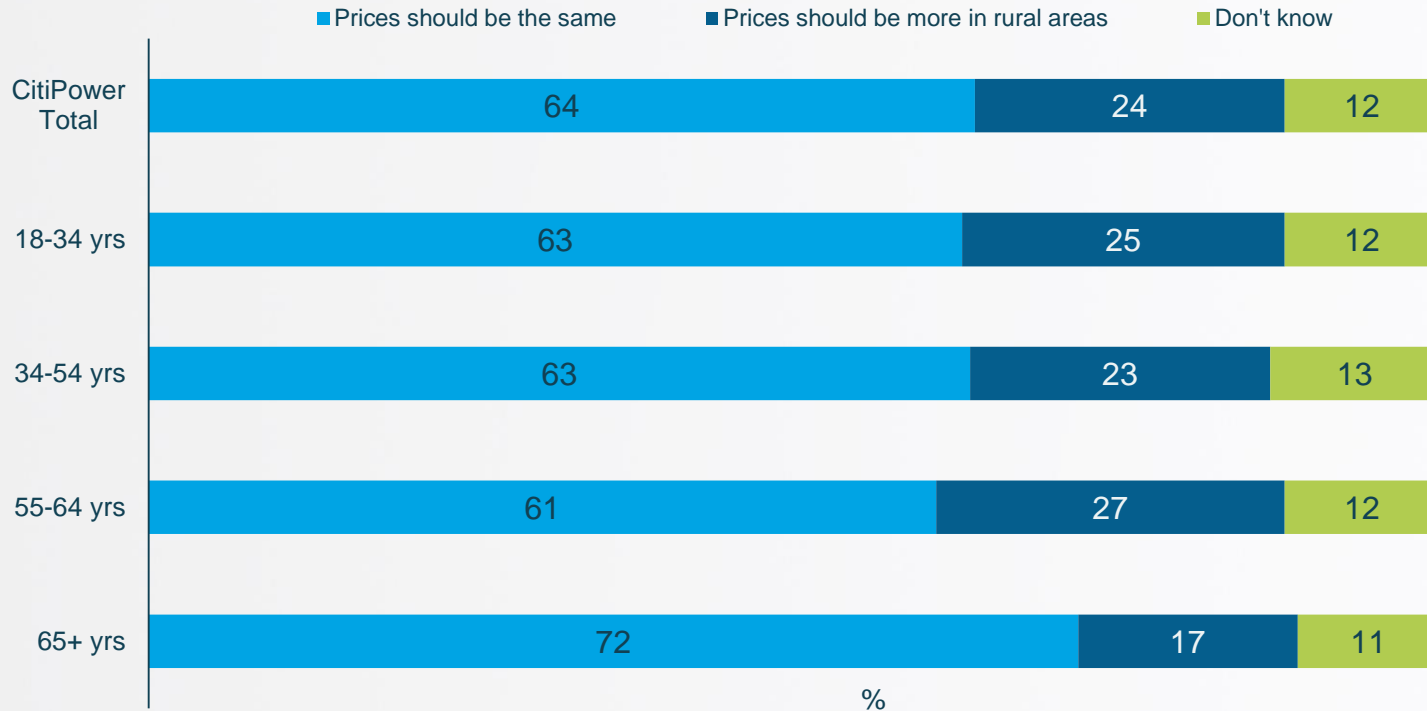|	Prefer stay the same	Prefer varies	Don't know
CitiPower Total	47	39	15
18-34 yrs	52	33	5
34-54 yrs	45	39	16
55-64 yrs	41	43	17
65+ yrs	44	49	7

%

Q27. Do you prefer that the price of electricity stays the same throughout the day regardless of how or what time of the day you use it, or would you prefer that it varies? A variable price would allow you to alter your electricity usage in response to lower and higher prices.
Base All respondents n=640

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There was a preference for pricing to remain the same across urban and rural areas.

Time of Use Pricing Preferences

■ Prices should be the same ■ Prices should be more in rural areas ■ Don't know

|	Prices should be the same	Prices should be more in rural areas	Don't know
CitiPower Total	64	24	12
18-34 yrs	63	25	12
34-54 yrs	63	23	13
55-64 yrs	61	27	12
65+ yrs	72	17	11

%

Q28. It costs more to supply electricity to rural and remote areas than urban areas. Do you think that everyone should be paying the same rates regardless of where they live or should rural customers be paying more for electricity than urban customers?
Base All respondents n=640

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Nearly half were interested in a simple $2 rebate, with 18-34 year olds being significantly more interested in all rebate amounts.
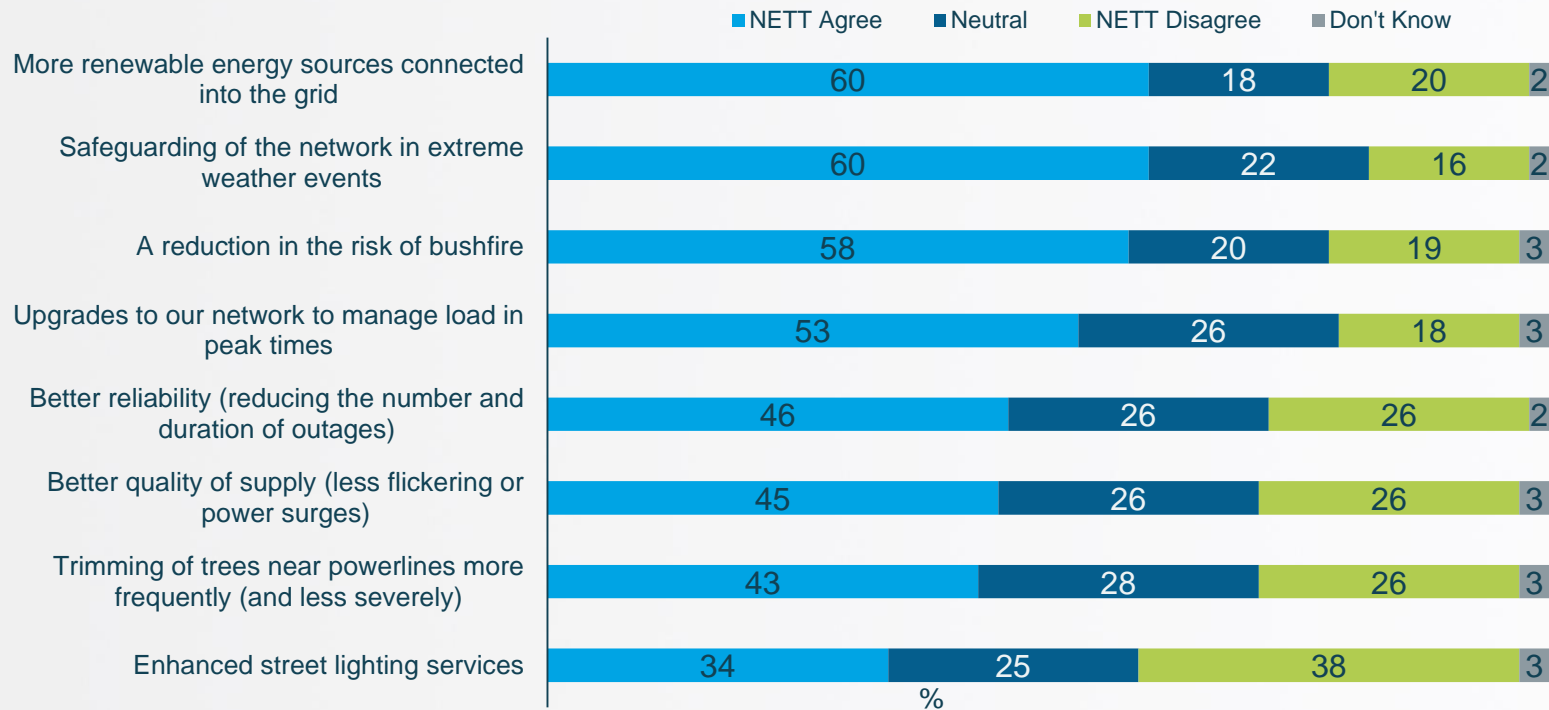
Rebates for Reduction in Electricity Consumption
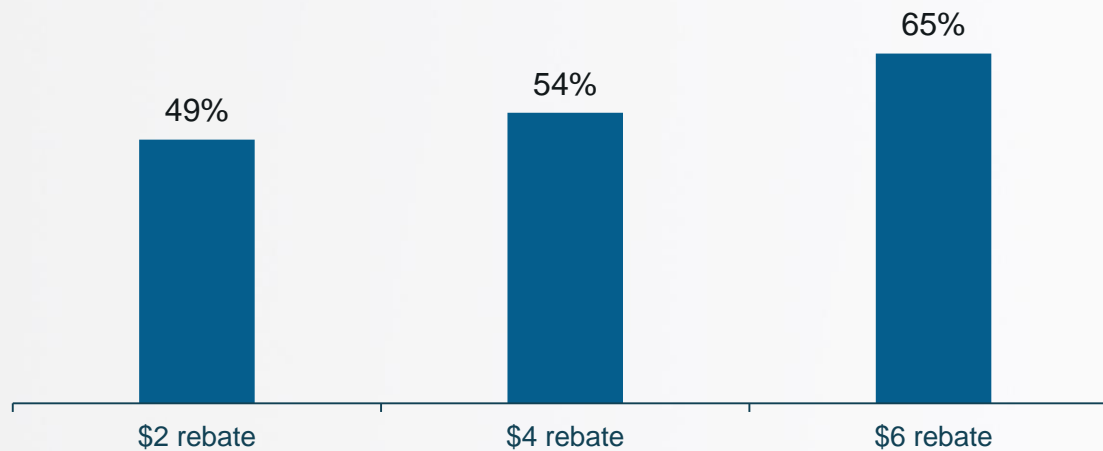
Q29. How interested would you be in a rebate that rewarded you for reducing your electricity consumption during peak times?   How interested would you be if the rebate resulted in a saving of …
Base All respondents n=640

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There was more willingness to pay for renewable energy sources, although there was significantly higher disagreement with this amongst those 65+ years.

Willingness to Pay for Various Services

Legend: ■ NETT Agree ■ Neutral ■ NETT Disagree ■ Don't Know

Service	NETT Agree	Neutral	NETT Disagree	Don't Know
More renewable energy sources connected into the grid	60	18	20	2
Safeguarding of the network in extreme weather events	60	22	16	2
A reduction in the risk of bushfire	58	20	19	3
Upgrades to our network to manage load in peak times	53	26	18	3
Better reliability (reducing the number and duration of outages)	46	26	26	2
Better quality of supply (less flickering or power surges)	45	26	26	3
Trimming of trees near powerlines more frequently (and less severely)	43	28	26	3
Enhanced street lighting services	34	25	38	3

%

Q30. To what extent do you disagree or agree that: "I would be happy with a small increase in my electricity bill (less than $1 per month per option) to provide…
Base All respondents n=640

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Those aged 18-34 and 65+ were slightly more likely to agree with most statements, with only the 55-64 year age group showing a significantly lower level of agreement with paying for bushfire risk reduction.

Willingness to Pay for Various Services by Age

NETT Agree %

Legend: ■ CitiPower Total ■ 18-34 yrs ■ 34-54 yrs ■ 55-64 yrs ■ 65+ yrs

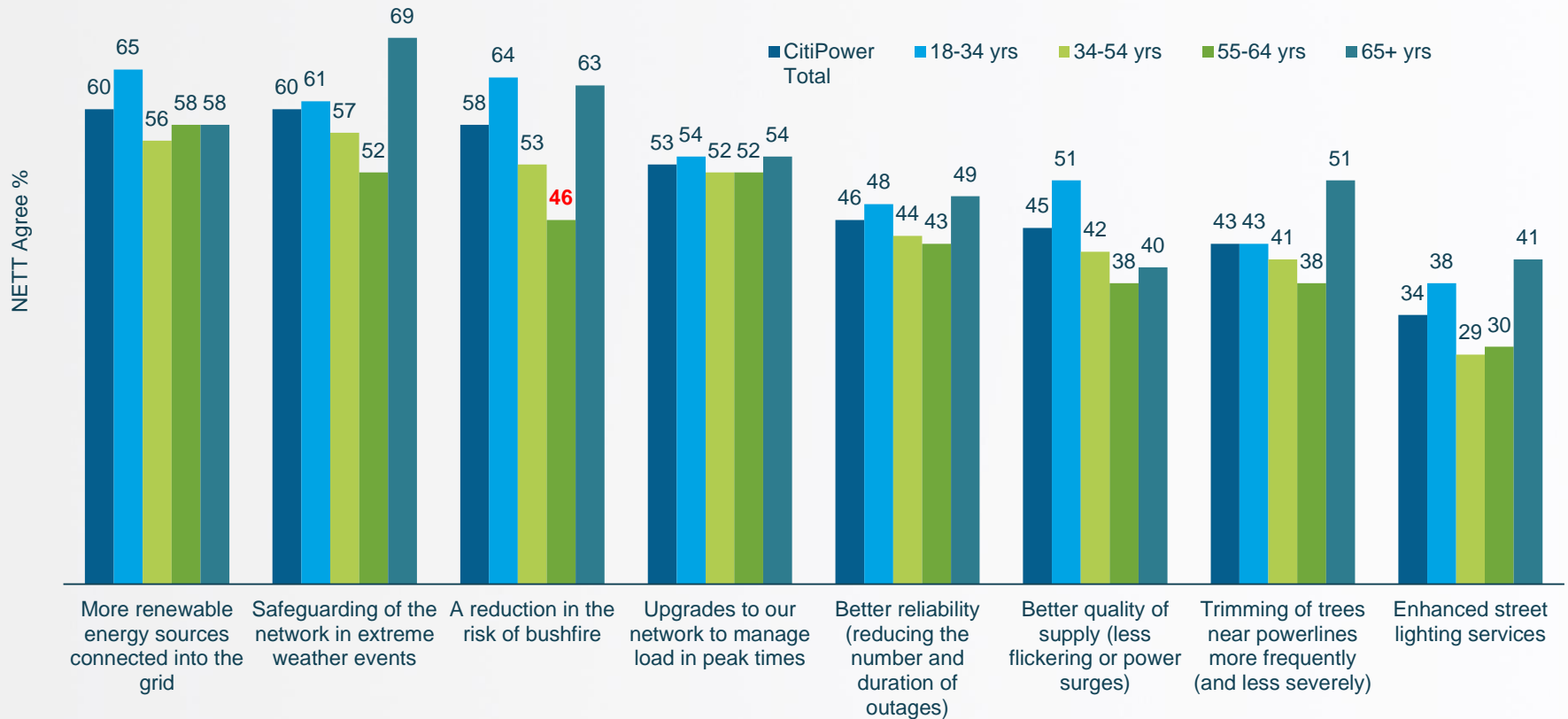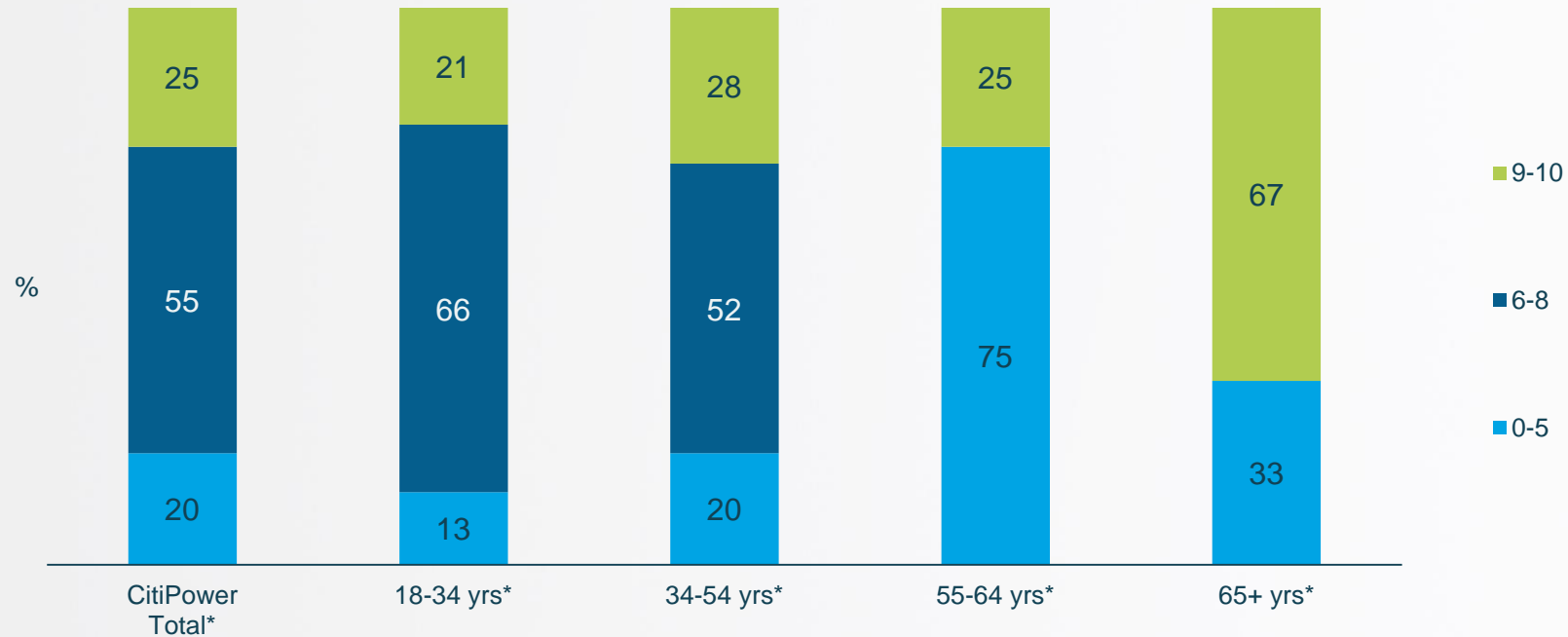| Category	CitiPower Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
More renewable energy sources connected into the grid	60	65	56	58	58
Safeguarding of the network in extreme weather events	60	61	57	52	69
A reduction in the risk of bushfire	58	64	53	46	63
Upgrades to our network to manage load in peak times	53	54	52	52	54
Better reliability (reducing the number and duration of outages)	46	48	44	43	49
Better quality of supply (less flickering or power surges)	45	51	42	38	40
Trimming of trees near powerlines more frequently (and less severely)	43	43	41	38	51
Enhanced street lighting services	34	38	29	30	41

Q30. To what extent do you disagree or agree that: "I would be happy with a small increase in my electricity bill (less than $1 per month per option) to provide…
Base All respondents n=640

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Connections

Respondents aged 18-34 years were significantly more likely to have had power connected for a newly built home in the last 12 months, with a moderate level of satisfaction.

Satisfaction with Connection Service

%

Legend:
- 9-10 (green)
- 6-8 (dark blue)
- 0-5 (light blue)

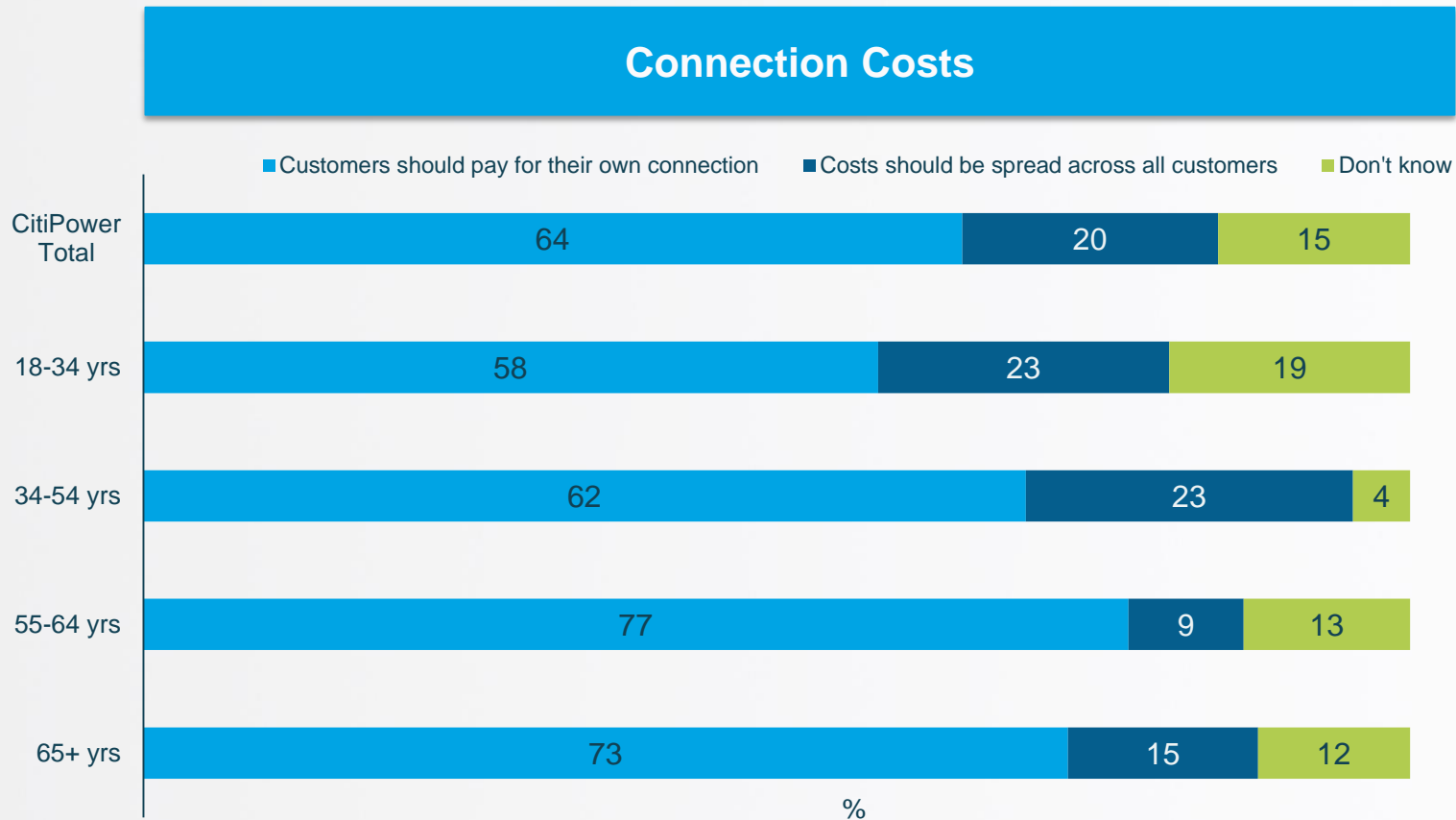|	CitiPower Total*	18-34 yrs*	34-54 yrs*	55-64 yrs*	65+ yrs*
9-10	25	21	28	25	67
6-8	55	66	52		
0-5	20	13	20	75	33

Q33. On a scale from 0-10, where 0 is very dissatisfied and 10 is very satisfied, how satisfied were you with the service you received from your distributor during the connection process?
Base respondents who had power connected for a new home in the past 12 months n=37*
*WARNING SMALL BASE SIZE

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Nearly two-thirds of respondents felt that customers should pay for their own connection, which was significantly higher amongst 55-64 year olds.

Connection Costs

■ Customers should pay for their own connection   ■ Costs should be spread across all customers   ■ Don't know

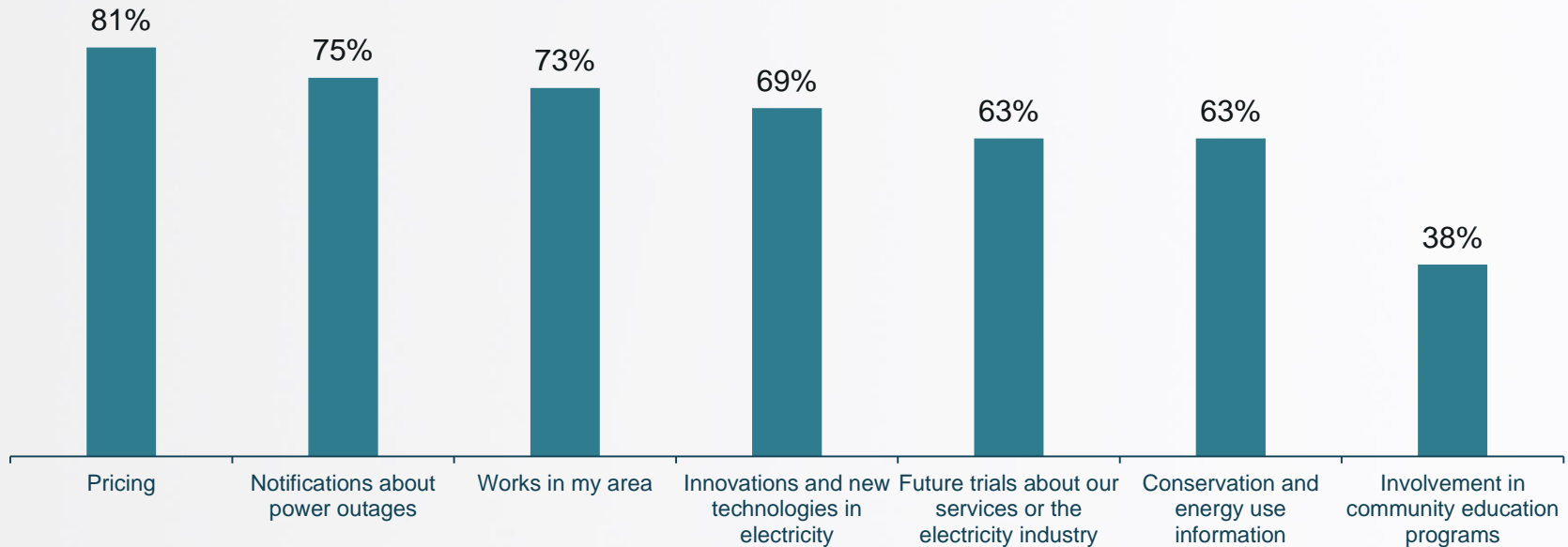|	Customers should pay for their own connection	Costs should be spread across all customers	Don't know
CitiPower Total	64	20	15
18-34 yrs	58	23	19
34-54 yrs	62	23	4
55-64 yrs	77	9	13
65+ yrs	73	15	12

%

Q34. Do you think the cost to connect customers to the network for a new home or solar should be spread across all customers, or paid by the individual requesting the connection?
Base All respondents n=640

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While only 38% indicated interest in community education programs, 18-34 year olds were significantly more likely to be interested in this topic (48%).

Interest in Education Topics

81% Pricing
75% Notifications about power outages
73% Works in my area
69% Innovations and new technologies in electricity
63% Future trials about our services or the electricity industry
63% Conservation and energy use information
38% Involvement in community education programs

Q36. How interested are you in learning more about the following….
Base All respondents n=640

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Residential Survey
Phase II
Prepared for CitiPower