Customer insights

22 November 2017

energised 2021-2025

Connecting with our customers

Customer segment	Interviews	Focus group	Survey	Total participants
Residential		18 focus groups 1.5 hours in length with 108 participants 4 CitiPower, 8 Powercor and 6 United Energy	1843 surveys 640 CitiPower, 600 Powercor and 603 United Energy	**1951**
Vulnerable		3 focus groups 1.5 hours in length with 18 participants 1 CitiPower, 1 Powercor and 1 United Energy		**18**
Small business			601 surveys 200 CitiPower, 200 Powercor and 201 United Energy	**601**
Commercial and Industrial	35-45 min interviews ANZ, Coca-Cola, Crown, Department of Education, Digital Reality, Epworth Hospitals, Flowserve, IXOM, MCG, Melbourne Water, Metro Trains, Telstra and Woolworths			**13**
			Total	**2583**

Samples were based on population statistics sourced from the Australian Bureau of Statistics based on the postcodes our networks service. Data was weighted by age and gender for residents, and size for businesses, to reflect the three network areas and the total area. The quantitative and qualitative data has been analysed for each research instrument.

Energy values

What three things do you value most about your electricity supply?

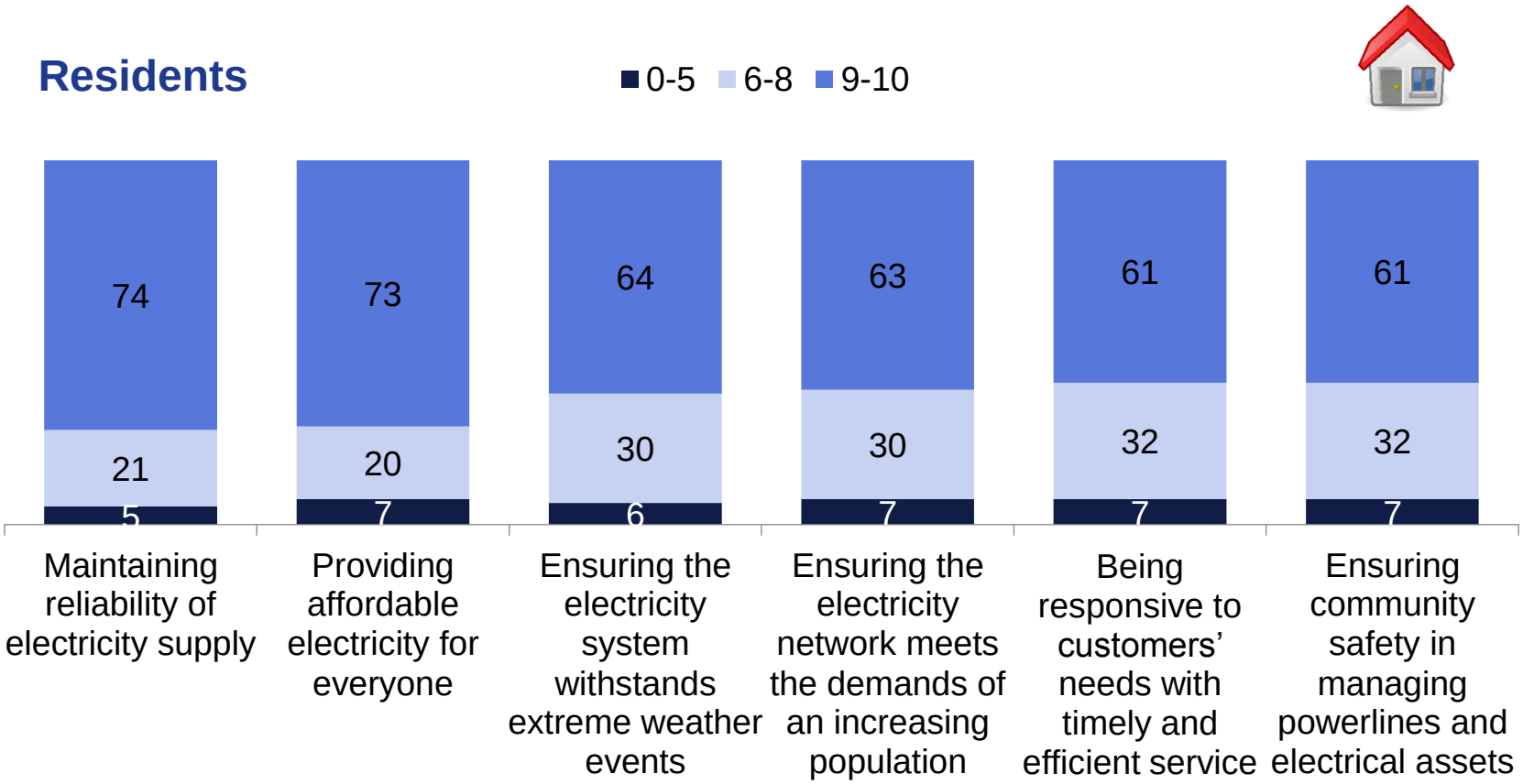
Residents	Total %	CP %	PC %	UE %
Reliability/ consistent supply	73	77	75	70
Price/low cost/value	67	71	64	69
Customer service	15	14	14	18
Fast response to supply issues/probs	11	11	13	10
Sustainability/ eco friendly	10	13	9	9
Good maintenance	6	3	7	6
No spikes/surges	6	5	6	5
Other	31	32	28	32

Businesses	Total %	CP %	PC %	UE %
Reliability/ consistent supply	88	91	89	84
Price/low cost/value	74	76	71	77
Fast response to supply issues/probs	18	19	18	18
Customer service	17	19	16	17
Communication (about outages)	8	8	10	4
Safety	7	8	8	7
No spikes/surges	7	4	8	9
Sustainability/eco friendly	6	8	6	4
Other	27	20	27	31

Reliability was also the number one priority for Commercial and Industrial customers. They're seeking uninterrupted high quality supply. Cost was also key.

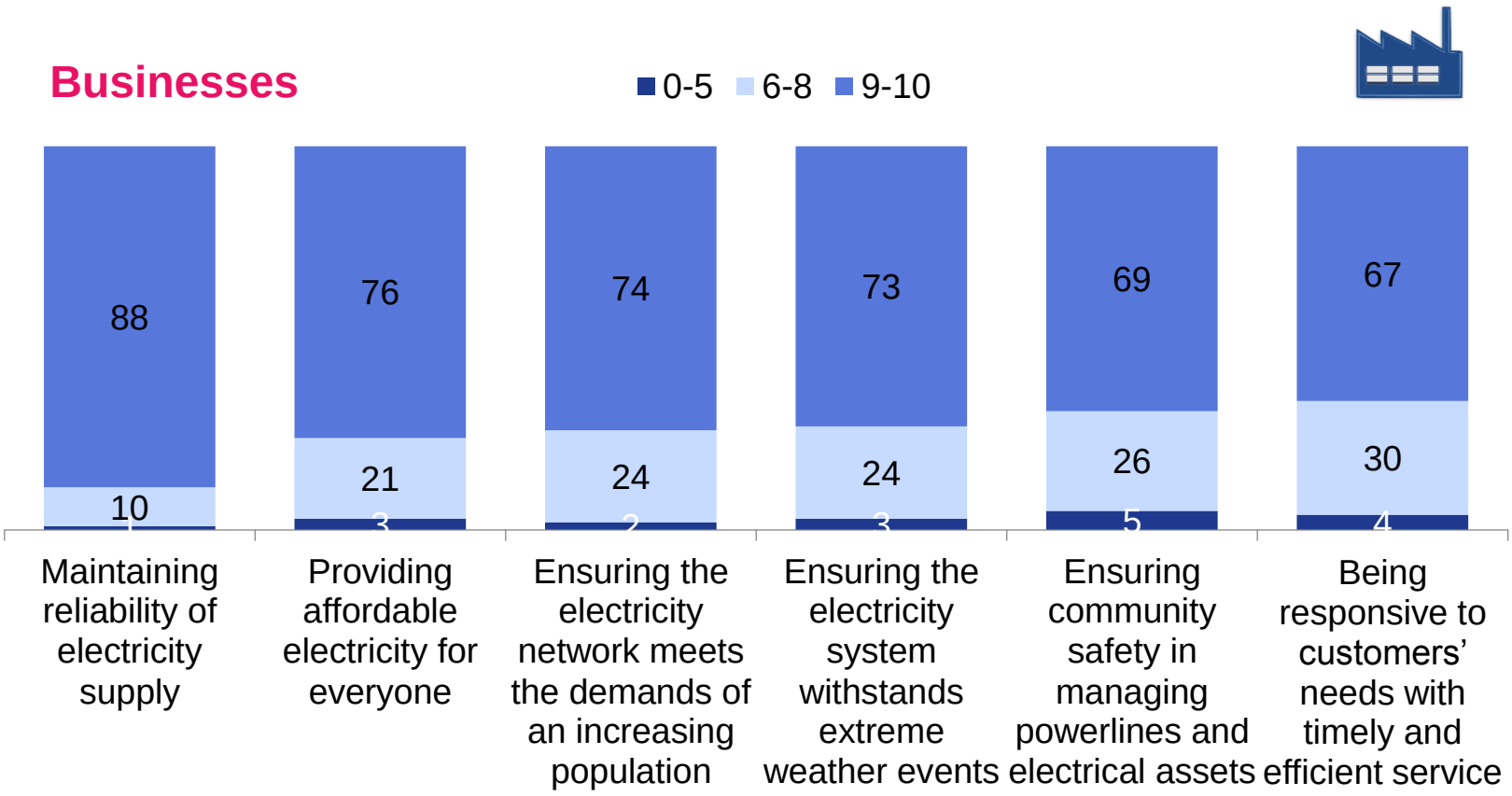
Base: All respondents (residents n=1843, businesses n=601)

How important are these values to you?



Base: All residents n=1843

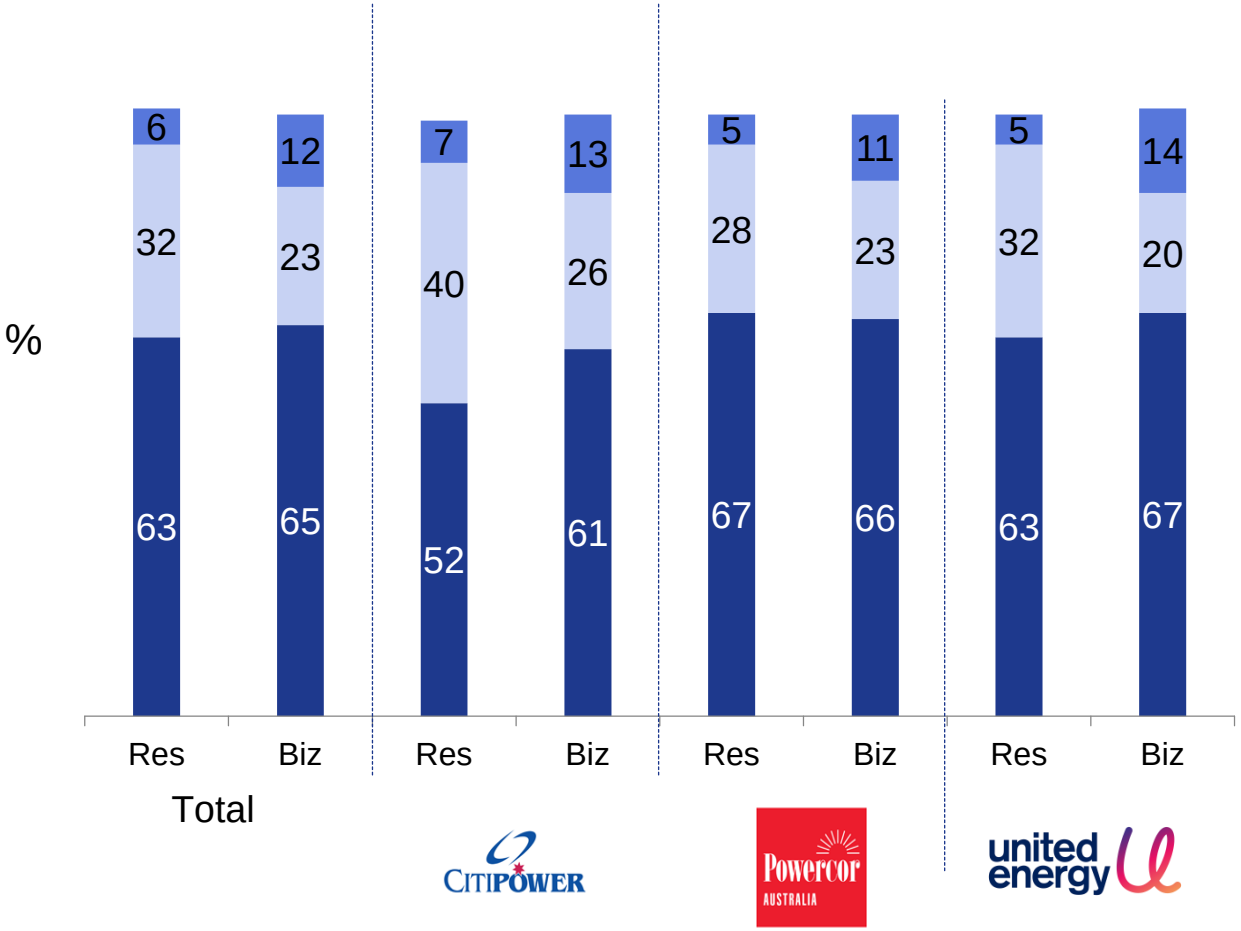
How important are these values to your business?



Base: All businesses n=601

Energy behaviours

What is your attitude towards electricity?

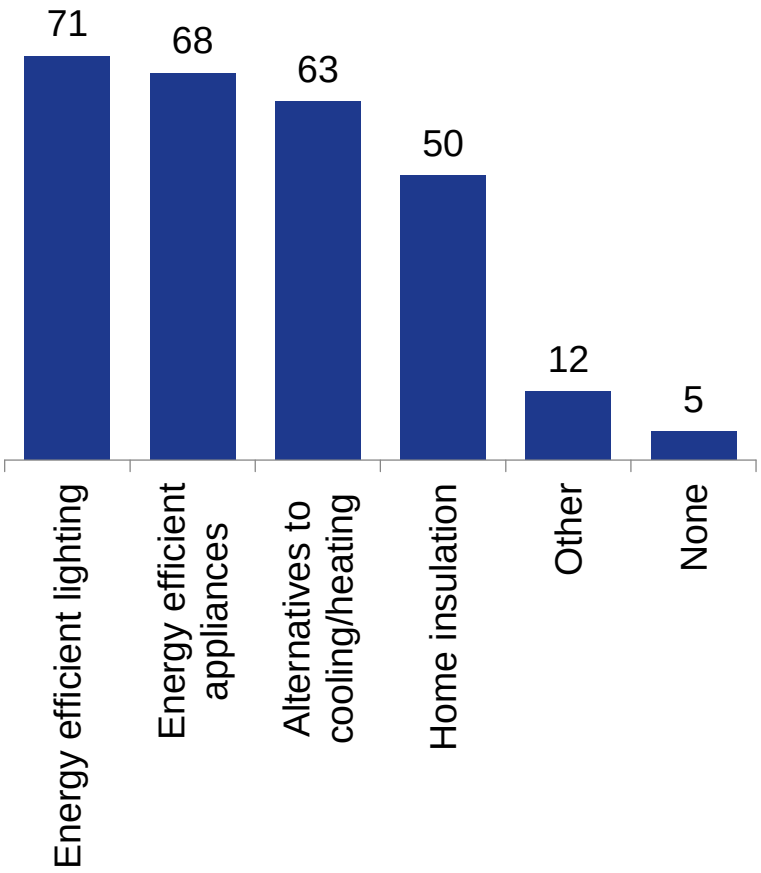


- We do not consciously monitor how much electricity we use, and do not try to actively reduce how much we use
- We try to be conscious of how much electricity we use, however we are poor at actively reducing how much we use
- We are very conscious of how much electricity we use and try to reduce our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

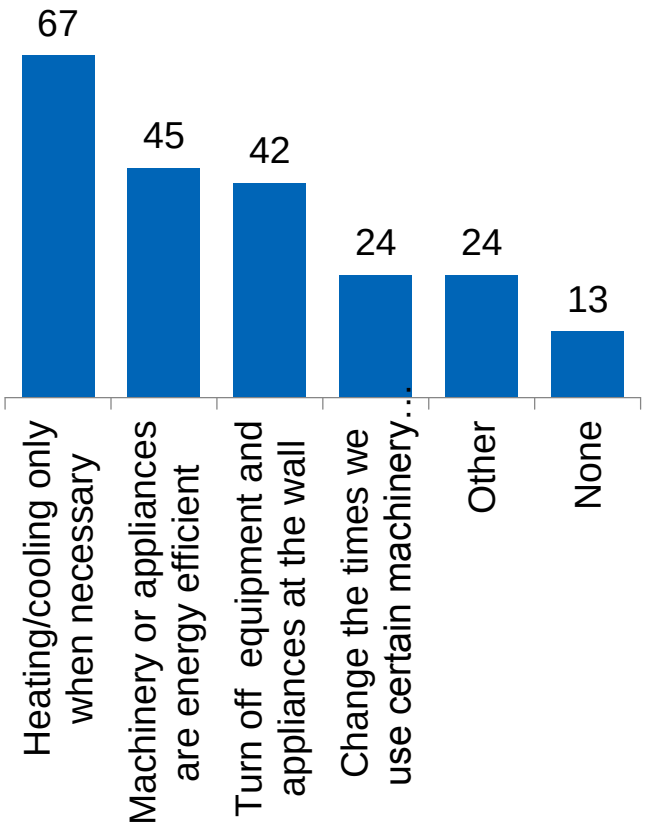
Base: All respondents (residents n=1843, businesses n=601)

What energy efficient measures have you adopted?

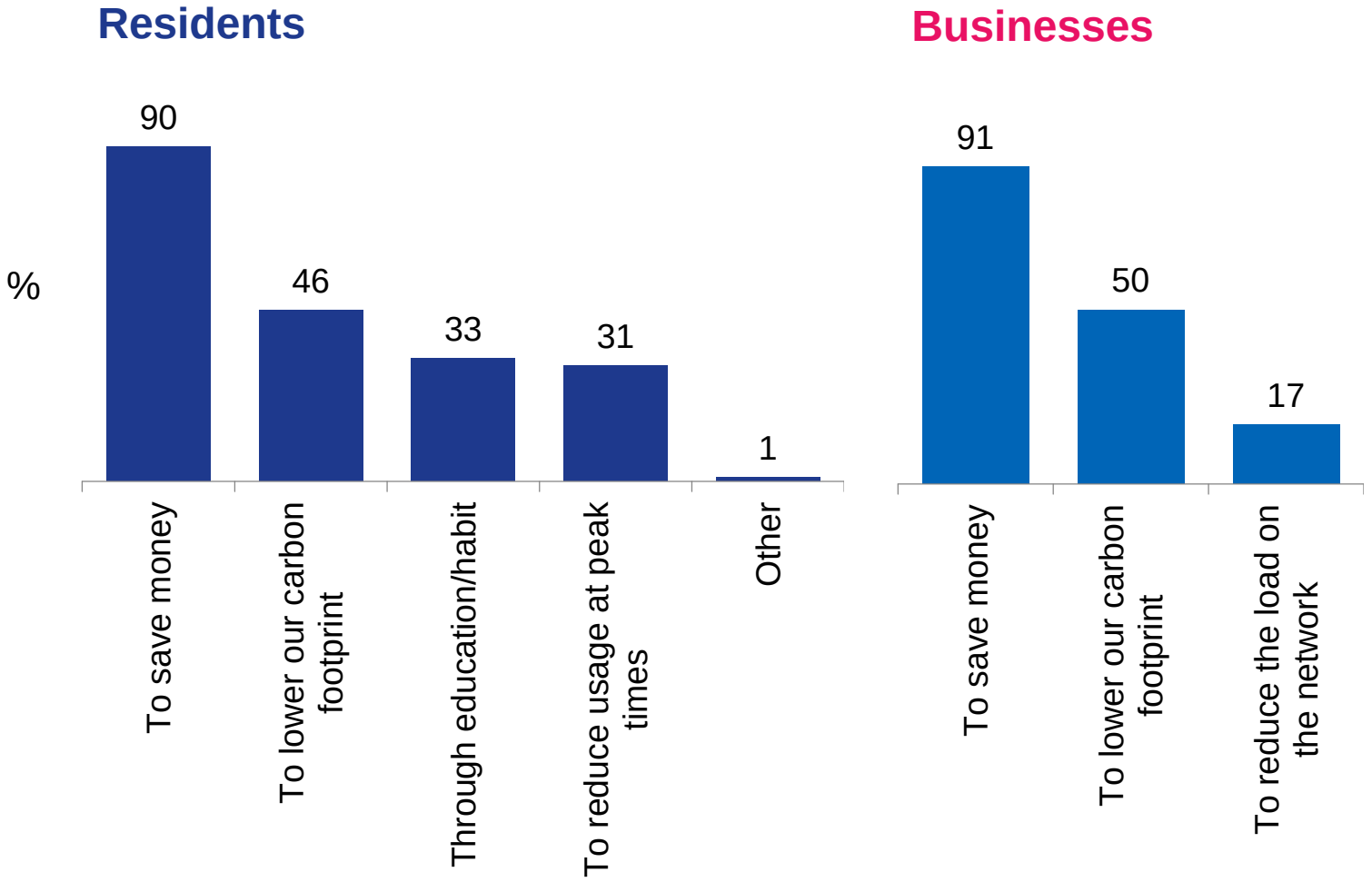
Residents



Businesses

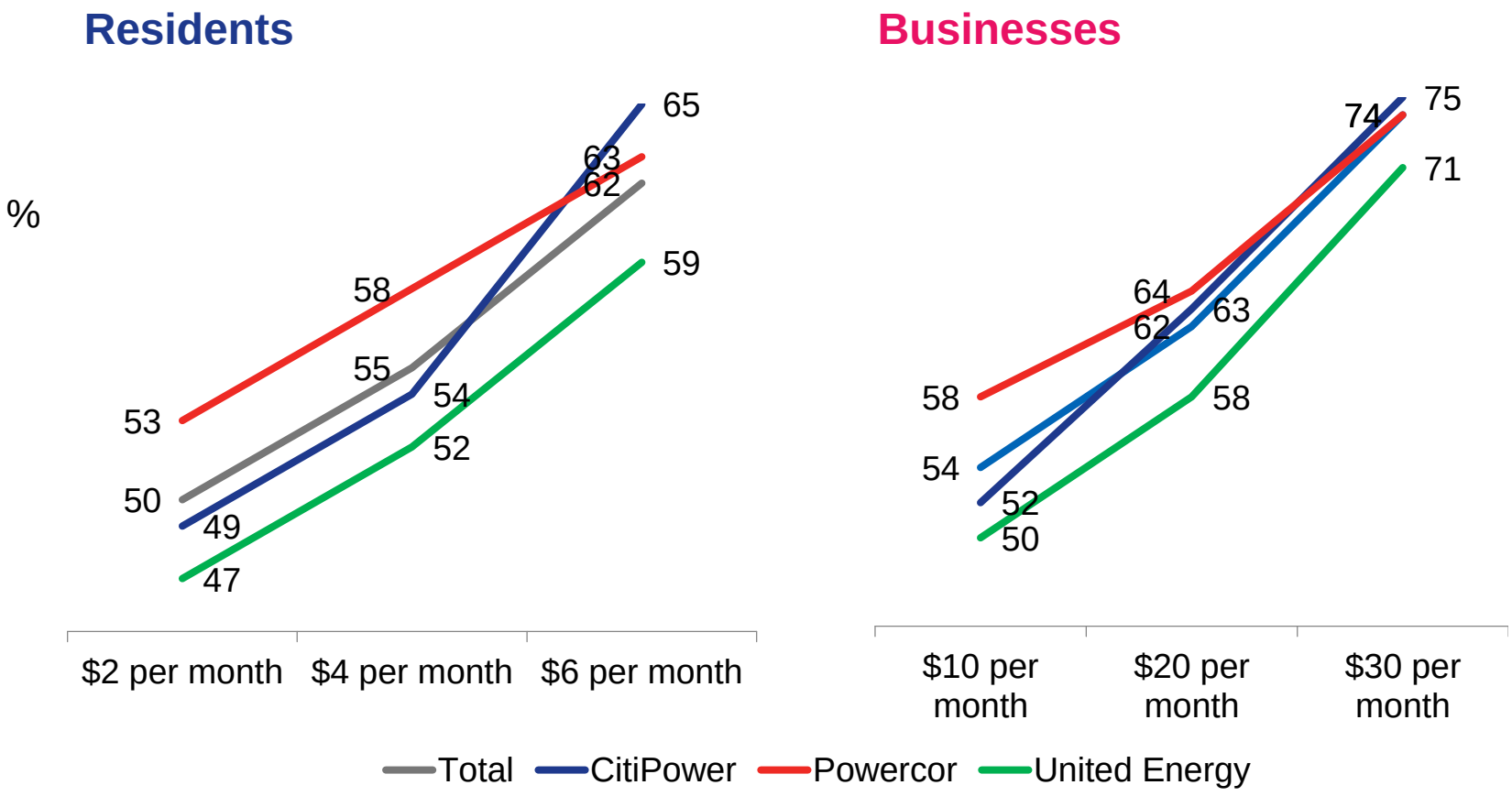


Why do you adopt energy efficient behaviours?



Base: Respondents who indicated they adopted at least one of the energy saving methods

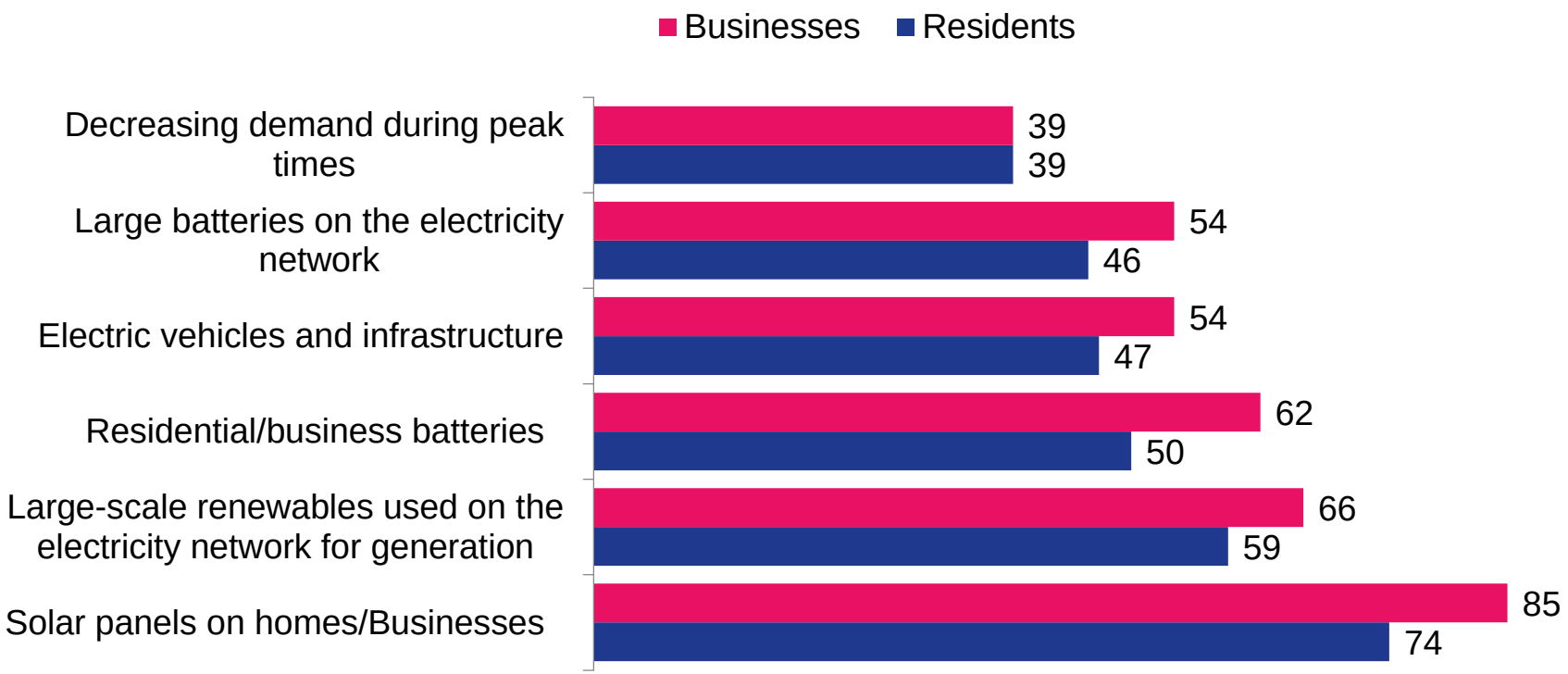
How interested are you in rebates for reducing electricity consumption during peak times?



Base: All respondents (residents n=1843, businesses n=601)

Views about alternative energy sources

Are you in favour of adoption of these options in the network?

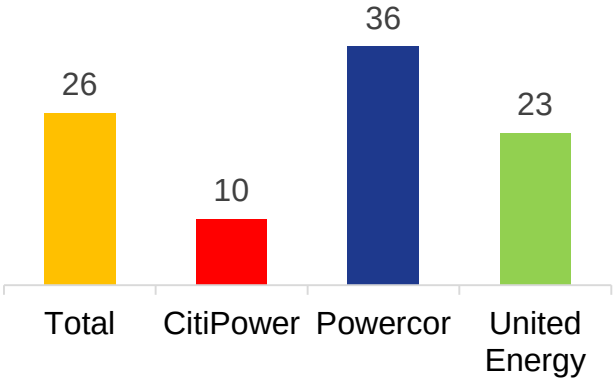


Base: All respondents (residents n=1843, businesses n=601)

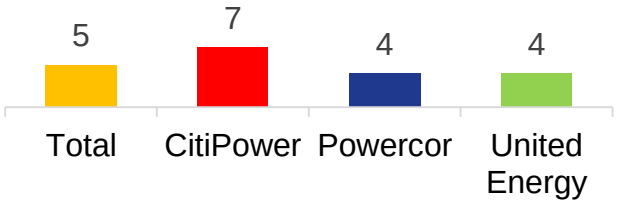
Which of these does your household currently have?

Residential

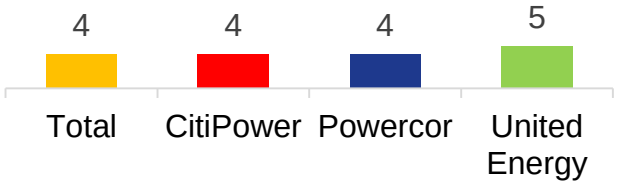
Solar panels



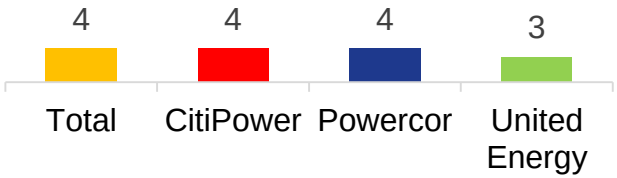
Central system to manage power



Batteries for storing electricity



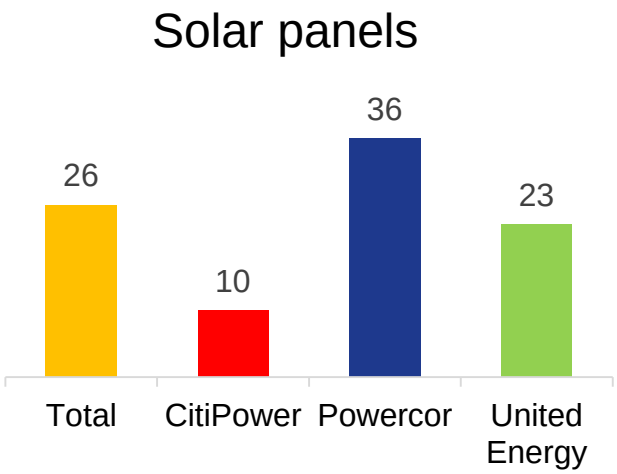
Electric vehicles

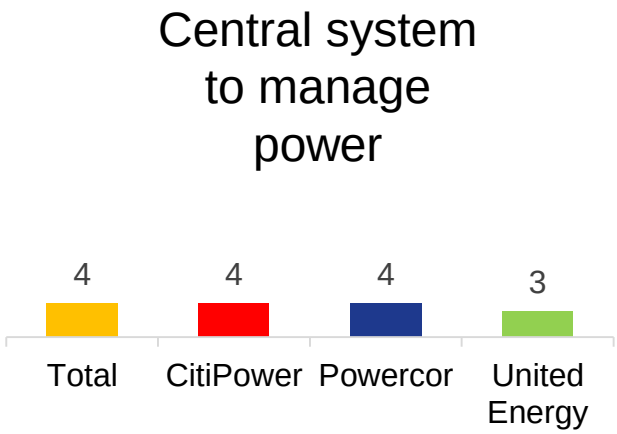


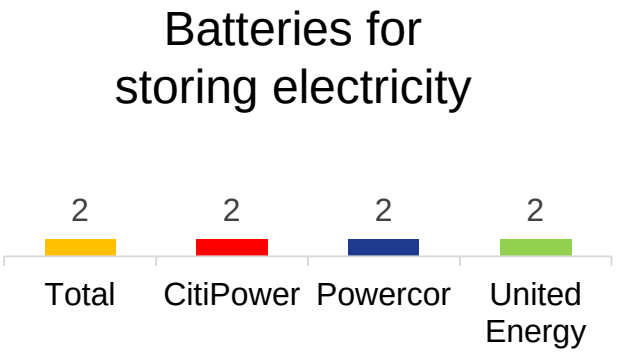
Base: All residents n=1843

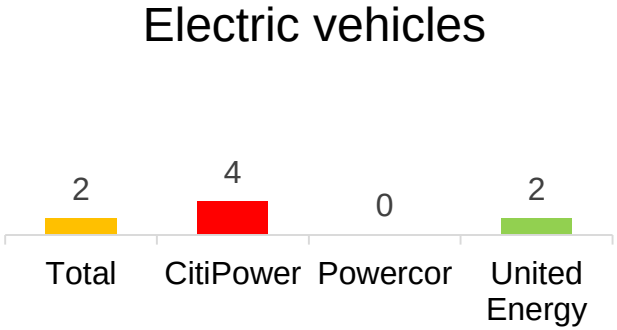
Which of these does your business currently have?

Business









Base: All business n=601

How likely would you be to adopt these options in the future?

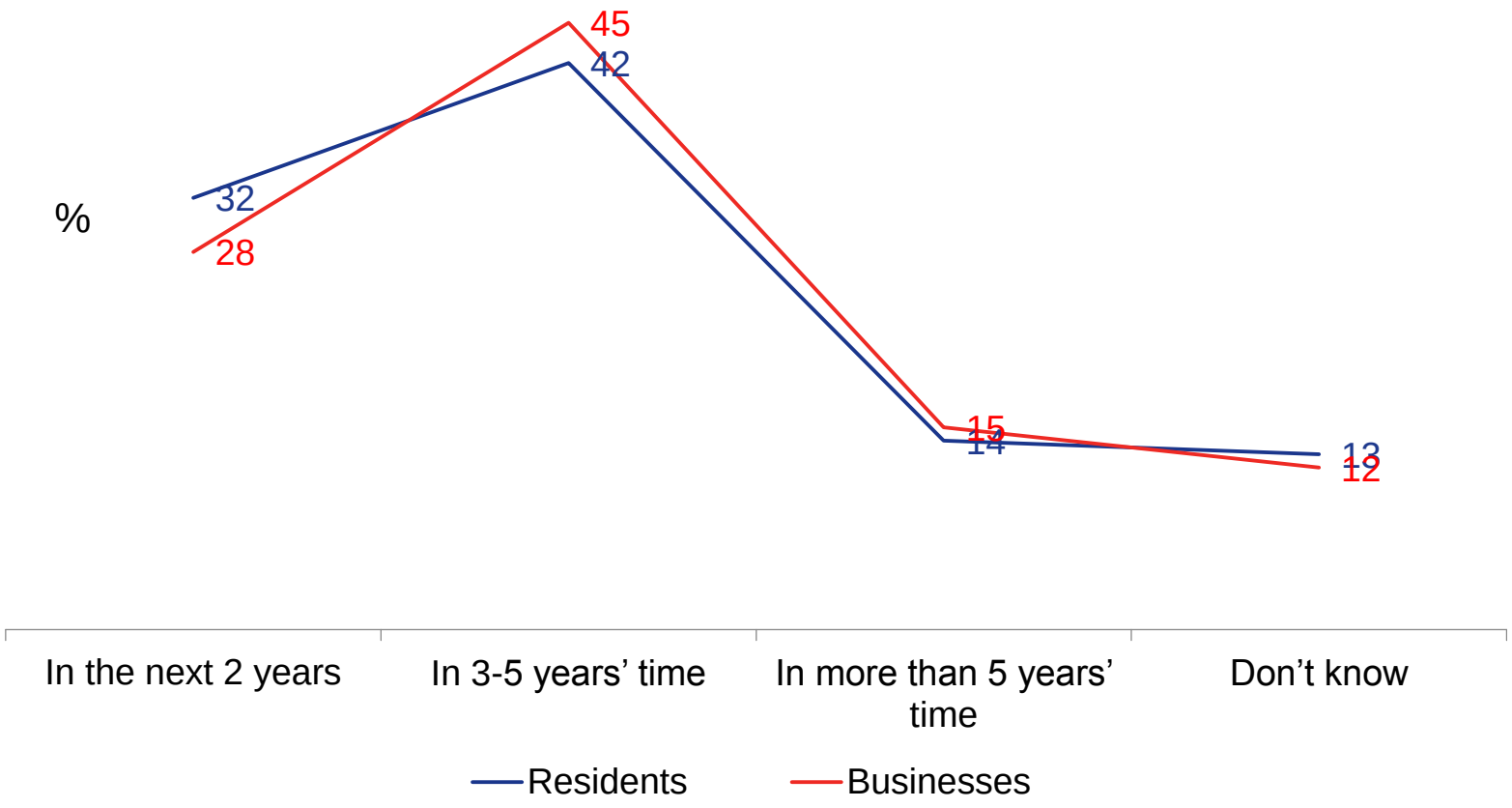
	Residential (%)	Business (%)
Install solar panels	33	35
Purchase a battery	28	35
Central system that manages your power and appliances	20	20
Purchase electric vehicle	18	14

Commercial and Industrial

- Most Commercial and Industrial customers expected to use more renewable sources in the future and are looking to the distributors to assist in the transition
- They expect more flexibility and innovation from distributors to facilitate multi-way energy flow and allow users to benefit from any excess electricity they generate

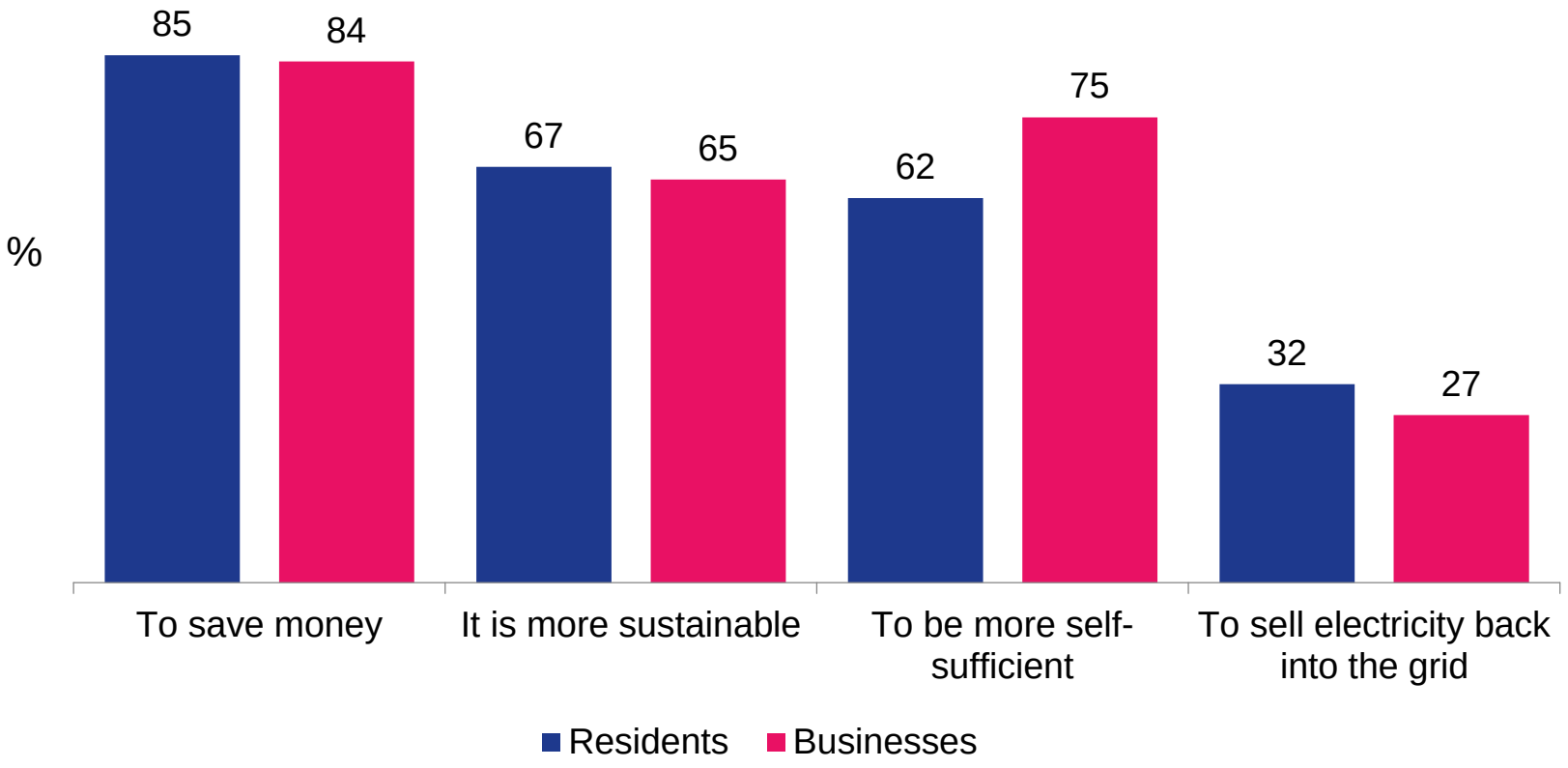
Base: Respondents who did not have the green energy option already (Bases vary)

When do you intend to adopt this energy option?



Base Respondents who did not have the green energy option already and were likely to purchase in the future (residents n= 881, businesses n=286)

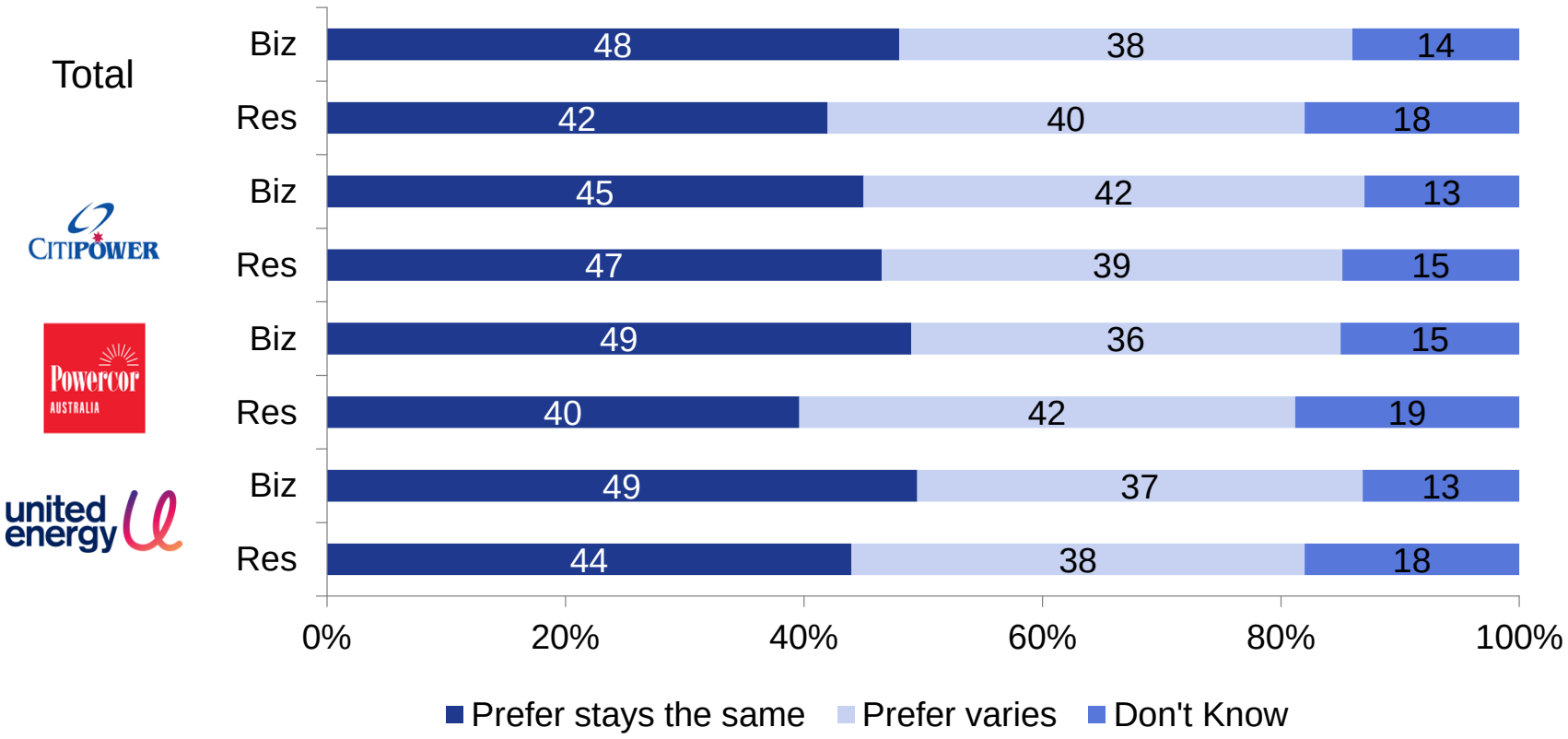
Why would you invest in green energy technology?



Base Respondents who did not have the green energy option already and were likely to purchase in the future
Residents n= 881, Businesses n=286

Pricing

Do you prefer that pricing stays the same or varies according to when you use it?



Base: All respondents (residents n=1843, businesses n=601)

Our customer personas

High consumer
Not focussed on energy (28%)

Defined as… 'having a bill of over $150 a month'

- More likely to be a family unit with kids living at the home that they own
- Average literacy and knowledge
- They are trying to be conscious about how much power they use, but old habits get the best of them and they aren't being effective at reducing bills
- While some say they have had some difficulty paying bills, they're not as interested in rebates or incentives as other groups

Sustainables
Environmental focus (28%)

Defined as… 'adopting energy saving behaviours to lower their carbon footprint and a rating of 9-10 on the environmentally responsible' value

- More likely to be older with higher energy literacy
- The environment is a top value
- Very conscious of how much electricity they use and try to reduce usage as much as possible, and likely to use energy efficient measures and behaviours
- Much more likely to be in favour of renewables, batteries, EVs and decreasing demand
- Although not necessarily more likely to have solar, they would like to have it, as well as batteries, EVs etc. for the reason that renewables are more sustainable
- Most likely to be altruistic and be willing to pay a bit more for those in less reliable areas and say that people should pay the same regardless of where they live

Energy conscious
Aware and active (22%)

Defined as…. 'very conscious of how much electricity they use and try to reduce usage as much as possible and use all energy efficiency measures listed'

- More likely to be older and retired
- More likely to be home owners and living in a house
- Higher energy literacy (awareness and knowledge) and more interested in finding out more information in general
- More likely to think everything is important in terms of values, but in particular reliability
- Main reason they use energy saving measures and behaviours is to save money
- More likely to be in favour of renewables and to have solar and if not, more likely to install in the future
- Less likely to say they would accept lower reliability for lower bills
- Prefer time of use pricing compared to others as provides more control over bill

Vulnerable
Price focussed (15%)

Defined as… 'having difficulty paying their bills and either have a low income/health care card or a disability or long term debilitating health condition'

- Spread across the age groups
- Lower income but not necessarily a low consumer, with a lower education level
- Often a tenant and more likely to be living alone
- Providing affordable electricity for everyone was more valued as was being responsive to customers' needs. Protecting customers' data and information was particularly important for them
- Very price sensitive and so more likely to say that they find alternatives to cooling/heating like opening windows or using blankets. Very interested in rebates
- Adopt energy saving behaviours primarily to save money rather than for other reasons
- Not as in favour of renewables and either not possible or not likely to purchase renewables

Early adopters
Driven by technology and control (10%)

Defined as… 'having a central system that manages their power and appliances, batteries or an electric vehicle'

- More likely to be younger, better educated and slightly higher income
- Know less about the distributor's role than the other groups
- Less value placed on affordability and reliability than other groups
- Conscious of electricity use but don't actively try to reduce consumption, when they do it is to try to reduce usage at peak times
- What they don't currently have in terms of a central system, batteries or EV they are more likely to get in the future than other groups
- Very interested in rebates

Small and medium businesses
Focus on reliability

- Small and medium business customers are more aware and knowledgeable about electricity than residents, although their energy literacy is still low
- Their top priority is a reliable and affordable supply in all seasons
- When it comes to powering their business they are actively looking for ways to reduce usage. Although saving money was the main reason for this, lowering their carbon footprint was also on their radar
- Sustainability also shone through their favourability towards investment in large and small scale solar, batteries and electric vehicles
- They also have a stronger interest in rebates than residents and indicated they're more willing to pay for improved reliability

Commercial and Industrial
Cutting costs and securing supply

- Reliability, quality and security were high on Commercial and Industrial customer expectations from the networks. However almost as important was the cost and affordability to power their business
- When looking into the future, they see higher costs, higher demand (due to automation), lower security (due to the closure of power stations) and the impacts of renewables as their biggest challenges
- Most expected to use more renewable sources in the future and are looking to the distributors to assist in the transition
- They expect more flexibility and innovation from distributors in the future to facilitate multi-way energy flow and allow users to benefit from any excess electricity they generate