Residential Survey
Phase 2 Results

Prepared for: United Energy
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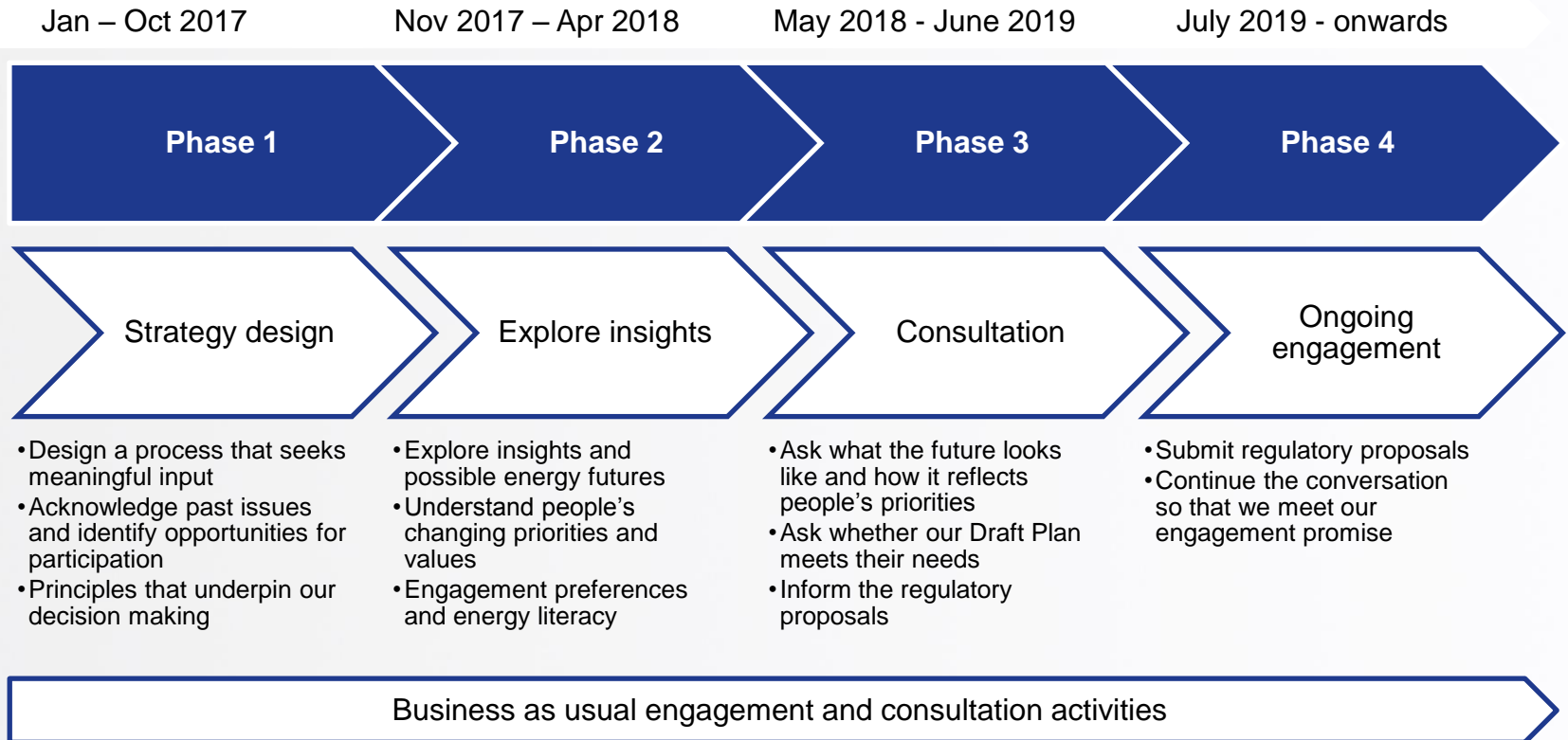# United Energy Residential Survey Results Contents

Approach

Background and context

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

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

- To help shape this regulatory proposal, United Energy 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.
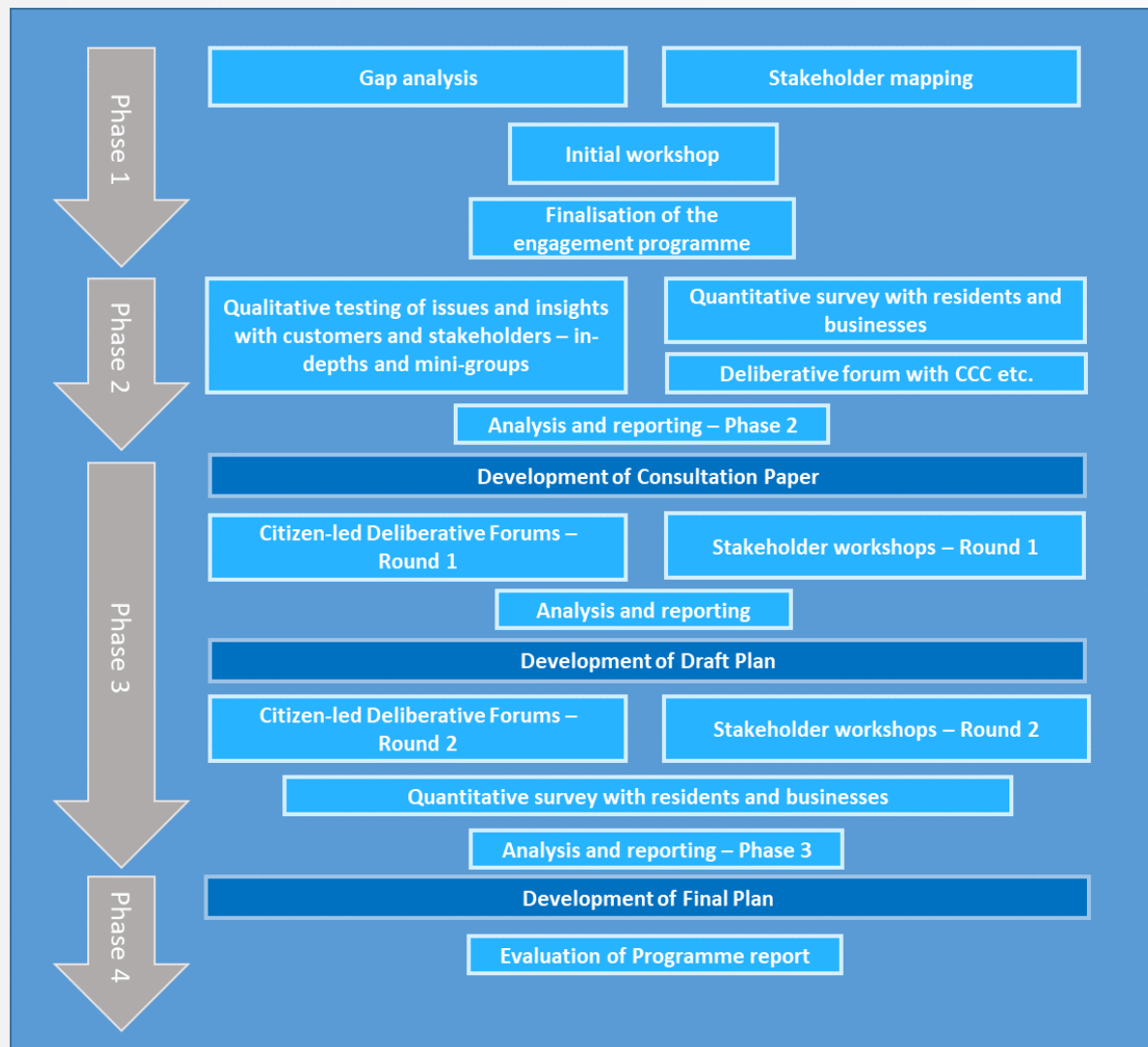

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Engagement program

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 United Energy 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, followed by affordability. When asked for current levels of satisfaction with reliability, 51% of residents offered a score of 9-10/10 for reliability.

  o Only 16% of residents were accepting of a reduction in their energy bill for a lower level of reliability, this was significantly lower amongst those ages 65+ years (3%) yet significantly higher amongst 18-34 year olds (31%).

Pricing

- The majority pay between $50-$150/month for their electricity bill, with nearly half of residents (47%) indicating they would reduce their energy consumption during peak times for a $2 rebate.

- There was a slight preference for pricing to remain the same throughout the day (44%), except amongst those aged 65+ who were more likely to prefer variable pricing (46%).

- 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 United Energy residents (44%) preferred the 'Steady State' future scenario.

- There is a willingness to pay a small increase for more renewable energy resources as well as safeguarding the network against extreme weather (49% for each).

- Those aged 55 and over are very conscious of electricity usage and reduce as much as possible (73%), as opposed to 45% of 18-34 year olds – who indicated they were poor at actively reducing how much they use.

- Money is the biggest incentive to adopt energy efficiency measures (89%). Measures used include energy efficient lighting and appliances, home insulation and finding alternatives to cooling/heating.

- Residents were strongly in favour of home solar panel installation (70%) – with 23% indicating they had these installed.

  o 18-34 year olds were significantly more likely to have storage batteries (18%), a central management system (10%) and electric vehicles (9%), while those over 65 had a significantly higher incidence of solar panels (31%).

  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.

- 18-34 year olds were significantly more likely to be interested in community education programs (58%) and in conservation energy use information (72%).

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Residential Survey Methodology

Methodology

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

- n=603 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 United Energy area.

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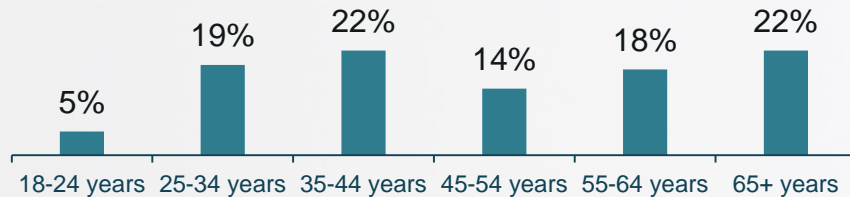
The survey covered the following areas:

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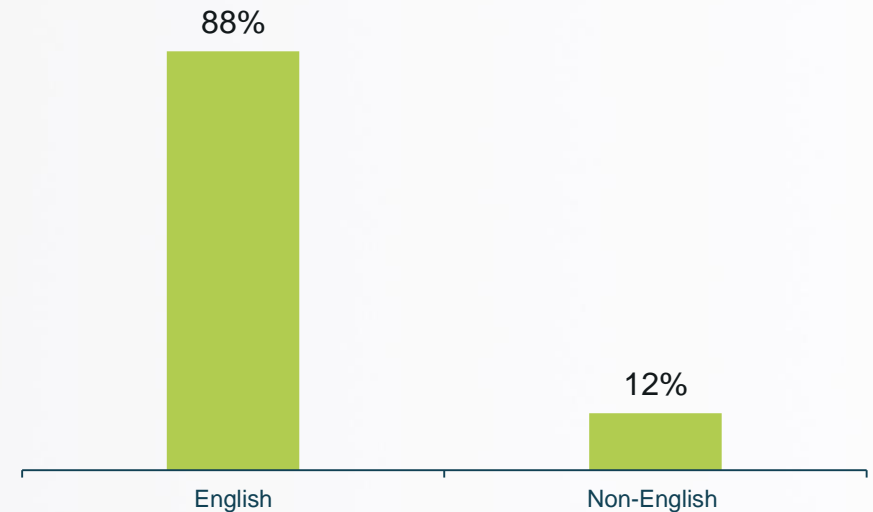- Pricing
- Connections
- Community engagement

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Participant Profile

Participant profile

Age breakdown

5%	19%	22%	14%	18%	22%
18-24 years	25-34 years	35-44 years	45-54 years	55-64 years	65+ years

CALD – English v non-English

English	Non-English
88%	12%

Q1 Which of the following age groups best describes you?
Q6. What is the main language spoken at home?
Base All respondents n=603

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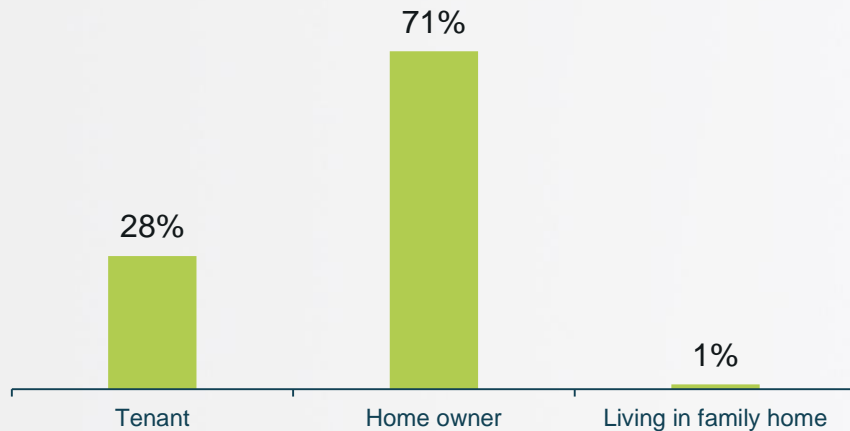RESEARCH & ENGAGEMENT

Participant profile

Residential status e.g. tenant, home owner etc.

Household make up e.g. single, couple etc.
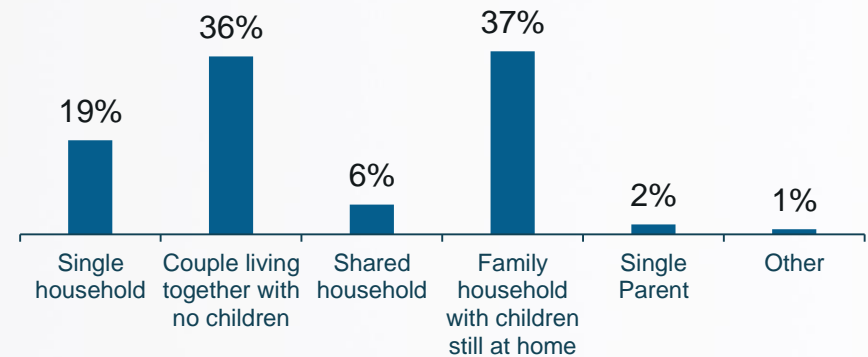
71%

28%

1%

| Tenant | Home owner | Living in family home |

19%

36%

6%

37%

2%

1%

| Single household | Couple living together with no children | Shared household | Family household with children still at home | Single Parent | Other |

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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
6%	27%	29%	15%	6%	16%
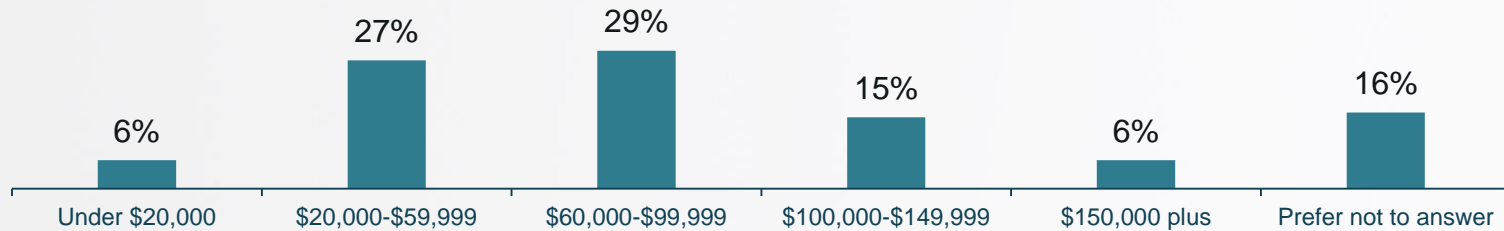
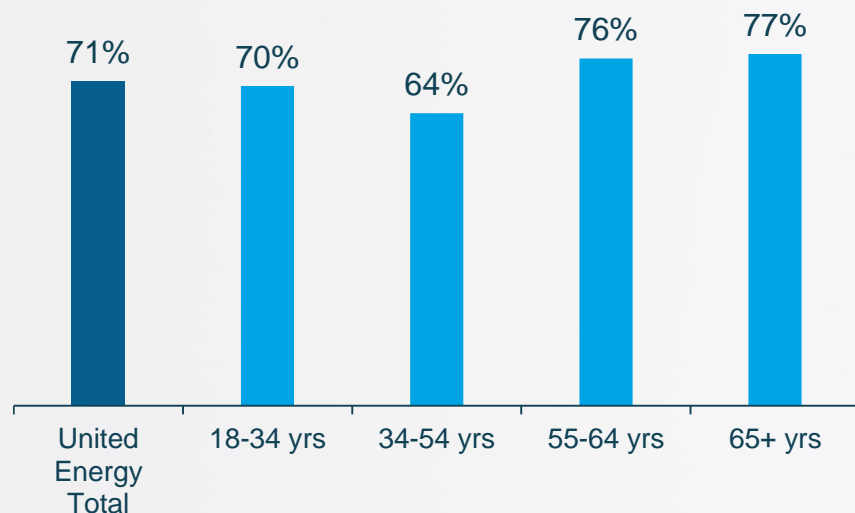Q40. Which of the following categories best describes the income before tax of the highest earner in your household?
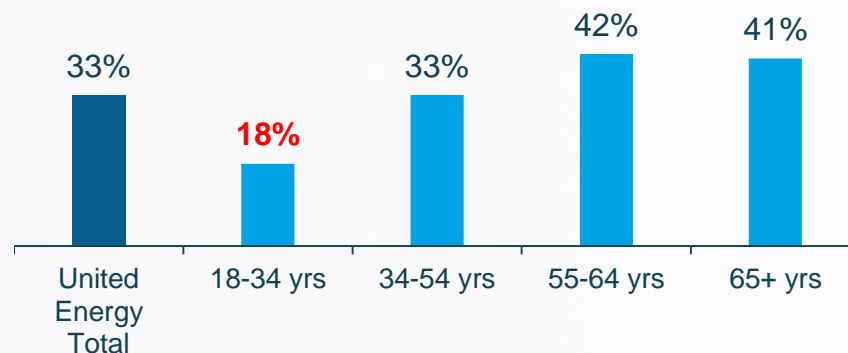Base All respondents n=603

Knowledge and Literacy

More than two thirds understood the difference between the role of a retailer and distributor, however only a third actually knew the name of their distributor (18% of young people).

Understanding of the difference between retailer and distributor

Knowledge of electricity distributor

Understanding of the difference between retailer and distributor:
- United Energy Total: 71%
- 18-34 yrs: 70%
- 34-54 yrs: 64%
- 55-64 yrs: 76%
- 65+ yrs: 77%

Knowledge of electricity distributor:
- United Energy Total: 33%
- 18-34 yrs: **18%**
- 34-54 yrs: 33%
- 55-64 yrs: 42%
- 65+ yrs: 41%

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=603

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

Perceived role of a distributor

Perceived roles	United Energy Total (n=428) %	18-34 yrs (n=99) %	35-54 yrs (n=144) %	55-64 yrs (n=78) %	65+ yrs (n=107) %
Getting electricity to your home	75	63	71	85	87
Maintaining electricity poles and wires	72	61	64	86	83
Responding to electricity outages and interruptions	71	53	63	80	85
Connecting electricity to new homes	62	54	55	66	77
Long term planning to ensure a resilient electricity supply	53	57	42	64	66
Maintaining and operating street lighting	54	52	45	62	62
Trimming vegetation around powerlines	48	31	34	61	74
None of the above	6	1	14	3	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=428

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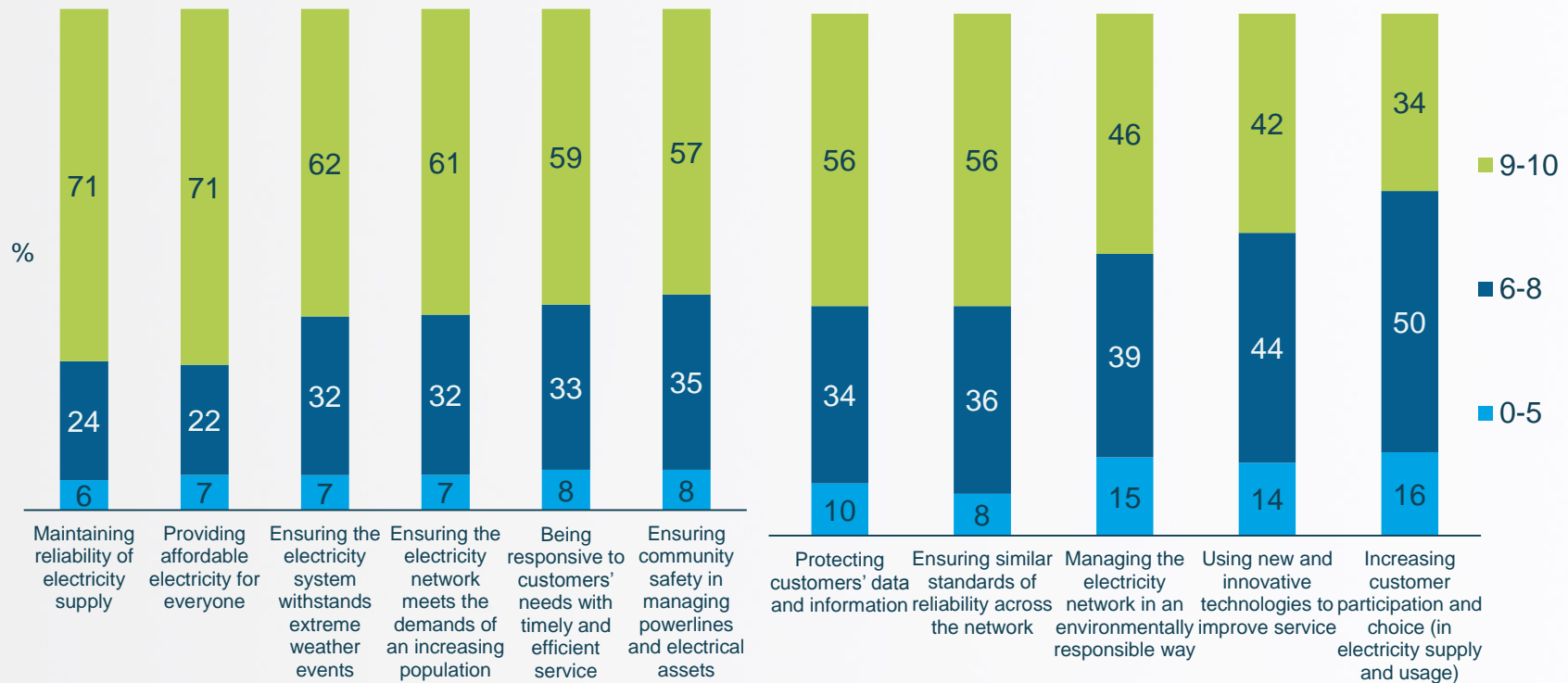
Top three things most valued by residents

Values	United Energy Total (n=603) %	18-34 yrs (n=138) %	35-54 yrs (n=203) %	55-64 yrs (n=110) %	65+ yrs (n=152) %
Reliability/consistent supply	70	**55**	71	**82**	77
Price/low cost/value	69	68	70	67	70
Customer service	18	17	15	16	23
Safety	11	9	9	16	10
Fast response to supply issues/problems	10	6	8	10	**20**
Sustainability/eco friendly	9	9	11	8	7
Good maintenance	6	**1**	6	9	11
No spikes/surges	5	4	5	5	8
Honesty/trustworthiness/accountability	5	3	6	6	5
Efficiency	4	6	3	4	5
Good discounts/ loyalty programs	4	6	4	3	3
Other	18	21	15	14	20
Don't know/not answered	8	**15**	8	7	**2**

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=603

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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.
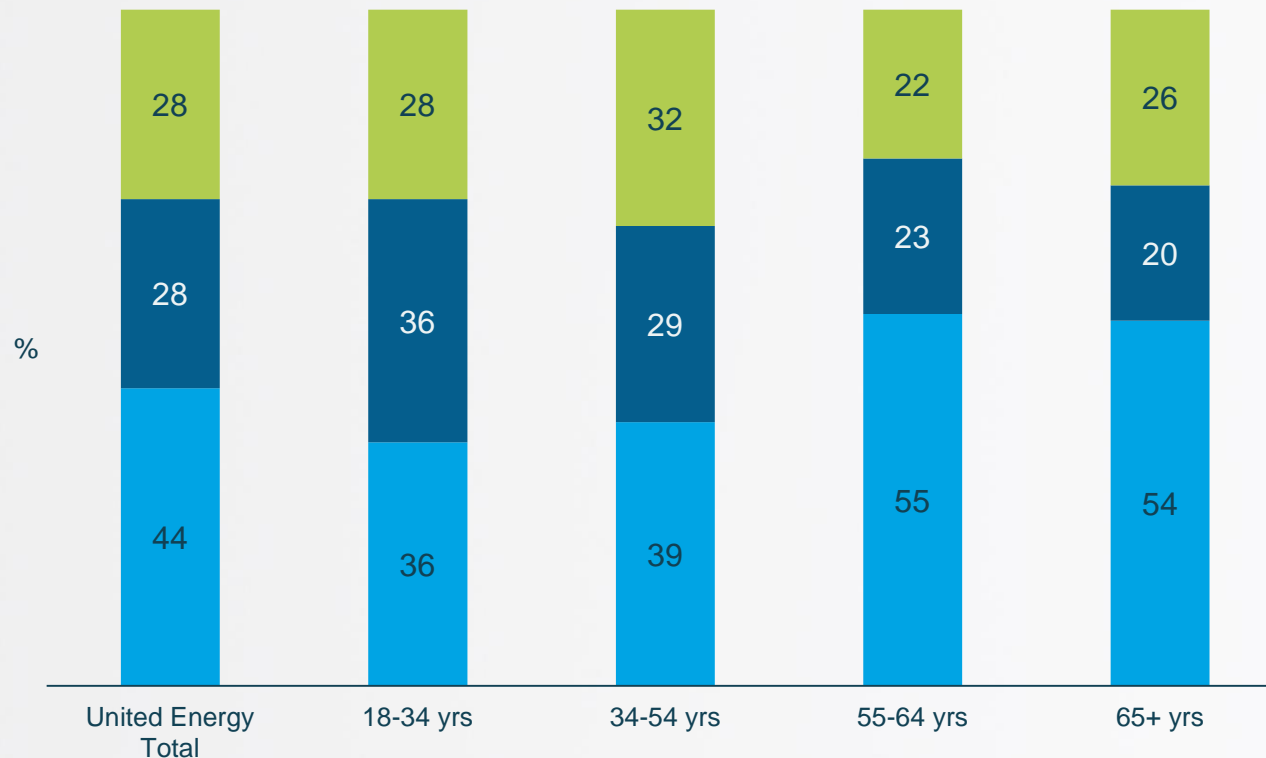
Importance of values

	9-10	6-8	0-5
Maintaining reliability of electricity supply	71	24	6
Providing affordable electricity for everyone	71	22	7
Ensuring the electricity system withstands extreme weather events	62	32	7
Ensuring the electricity network meets the demands of an increasing population	61	32	7
Being responsive to customers' needs with timely and efficient service	59	33	8
Ensuring community safety in managing powerlines and electrical assets	57	35	8
Protecting customers' data and information	56	34	10
Ensuring similar standards of reliability across the network	56	36	8
Managing the electricity network in an environmentally responsible way	46	39	15
Using new and innovative technologies to improve service	42	44	14
Increasing customer participation and choice (in electricity supply and usage)	34	50	16

%

Q12. Could you now read through a list of values other people have suggested for the role of an electricity distributer and indicate how important that particular value is to you personally using a scale from 0-10 where 10 is extremely important and 0 is not important at all. You may use any number in between to indicate how important it is to you. Taking the first value…
Base All respondents n=603

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In the United Energy area there was a strong preference for the Steady State scenario, strongest amongst those over 55 years, while younger groups saw more of a lean towards Consumer Power.

Most preferred future scenario

	United Energy Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
Green Power	28	28	32	22	26
Consumer Power	28	36	29	23	20
Steady State	44	36	39	55	54

%

Green Power

Consumer Power

Steady State

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Energy Behaviours

Nearly two-thirds of customers were very conscious of their electricity usage, significantly more so amongst 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	Poor at reducing	Do not monitor
United Energy Total	63	32	5
18-34 yrs	45	50	5
34-54 yrs	62	32	6
55-64 yrs	73	23	4
65+ yrs	77	18	5

%
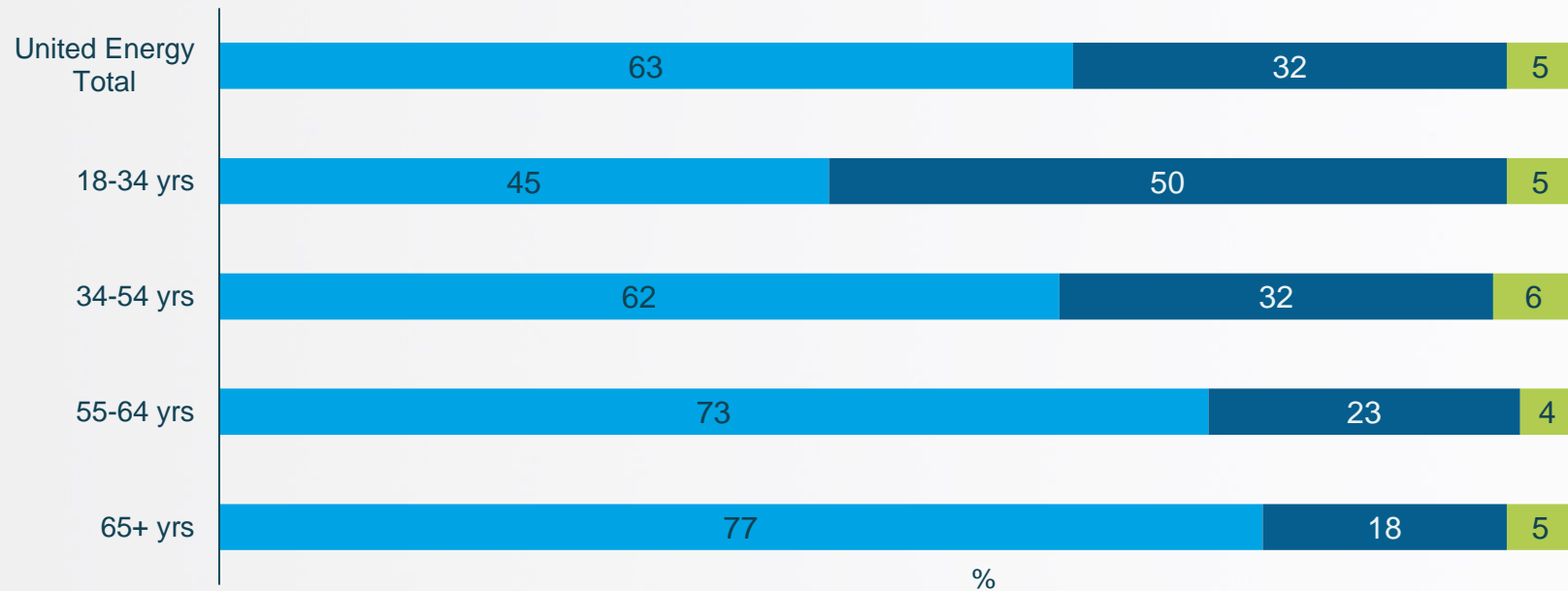
Q14. How would you describe your household's attitude towards electricity?
Base All respondents n=603

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The most common electricity saving behaviours were purchasing and installing energy efficient lighting and appliances, especially amongst those over 55 years.

Adoption of energy efficiency measures

Energy efficiency measures	United Energy Total (n=603) %	18-34 yrs (n=138) %	35-54 yrs (n=203) %	55-64 yrs (n=110) %	65+ yrs (n=152) %
Installing energy efficient lighting	71	**57**	66	**85**	**85**
Purchasing energy efficient appliances	70	**59**	67	73	**85**
Finding alternatives to cooling/heating (such as opening windows or using blankets)	59	54	62	61	60
Home insulation to reduce your energy reliance	50	**30**	43	**61**	**72**
Using solar	6	**-**	4	10	**11**
Turning appliances etc off at the wall	3	2	3	3	4
Turning off lights not in use	1	1	2	1	2
Other	1	-	1	1	2
None	4	2	6	3	1

Q15. Which of the following energy efficiency measures does your household adopt?
Base All respondents n=603

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The main motivation to adoption of energy efficient measures was to save money. Those over 65 years were significantly more likely to attempt to reduce peak usage and have formed habits.

Reasons for adopting energy efficiency measures

Reasons for adopting energy efficiency measures	United Energy Total (n=603) %	18-34 yrs (n=138) %	35-54 yrs (n=203) %	55-64 yrs (n=110) %	65+ yrs (n=152) %
To save money	89	**82**	93	91	88
To lower our carbon footprint	45	46	46	39	44
To reduce usage at peak times	32	27	28	31	**44**
Through education / habit	31	25	31	27	**43**
Other	1	-	-	1	1

Q16. Why do you adopt energy saving behaviours?
Base Respondents who indicated they adopted at least one of the energy saving methods n=603

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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

70%	Solar panels on homes
53%	Large-scale renewables used on the electricity network for generation
47%	Residential batteries
44%	Electric vehicles and infrastructure
44%	Large batteries on the electricity network
35%	Decreasing demand during peak times
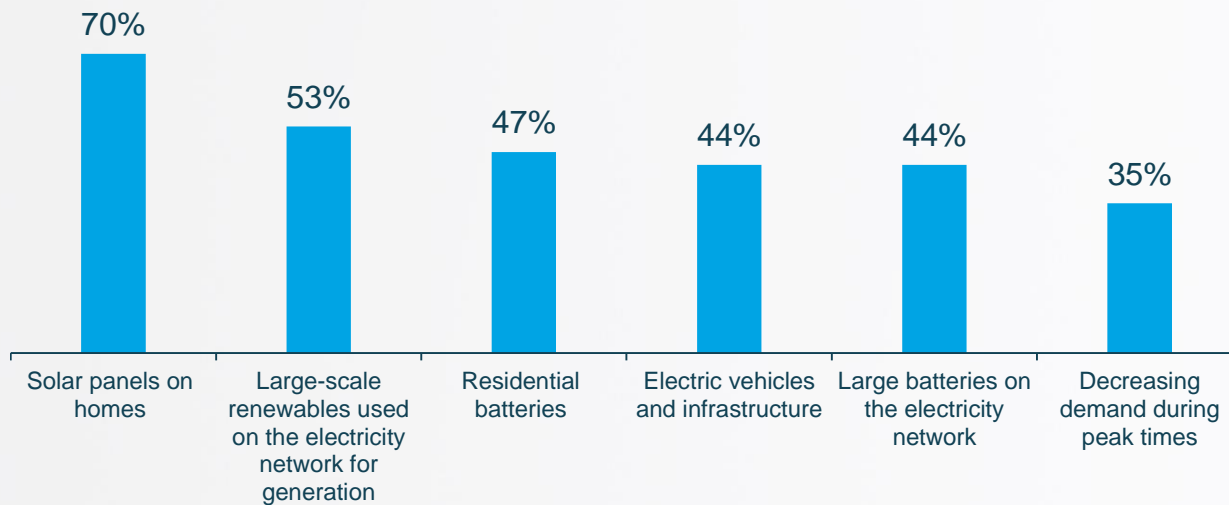
Q17. Looking at the following technological and behavioural options below, how much are you in favour of the adoption of them in the electricity network:
Base All respondents n=603

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Those between 18-34 years were significantly more likely to have storage batteries, central management systems and electric vehicles, while those over 65 years were significantly more likely to have solar panels.

Energy efficient solutions currently in place within the household

%

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

United Energy Total: 71, 23, 5, 4, 3
18-34 yrs: 64, 20, 18, 10, 9
34-54 yrs: 75, 19, 1, 4, 3
55-64 yrs: 74, 24, 0, 2, 1
65+ yrs: 69, 31, 1, 1, 0
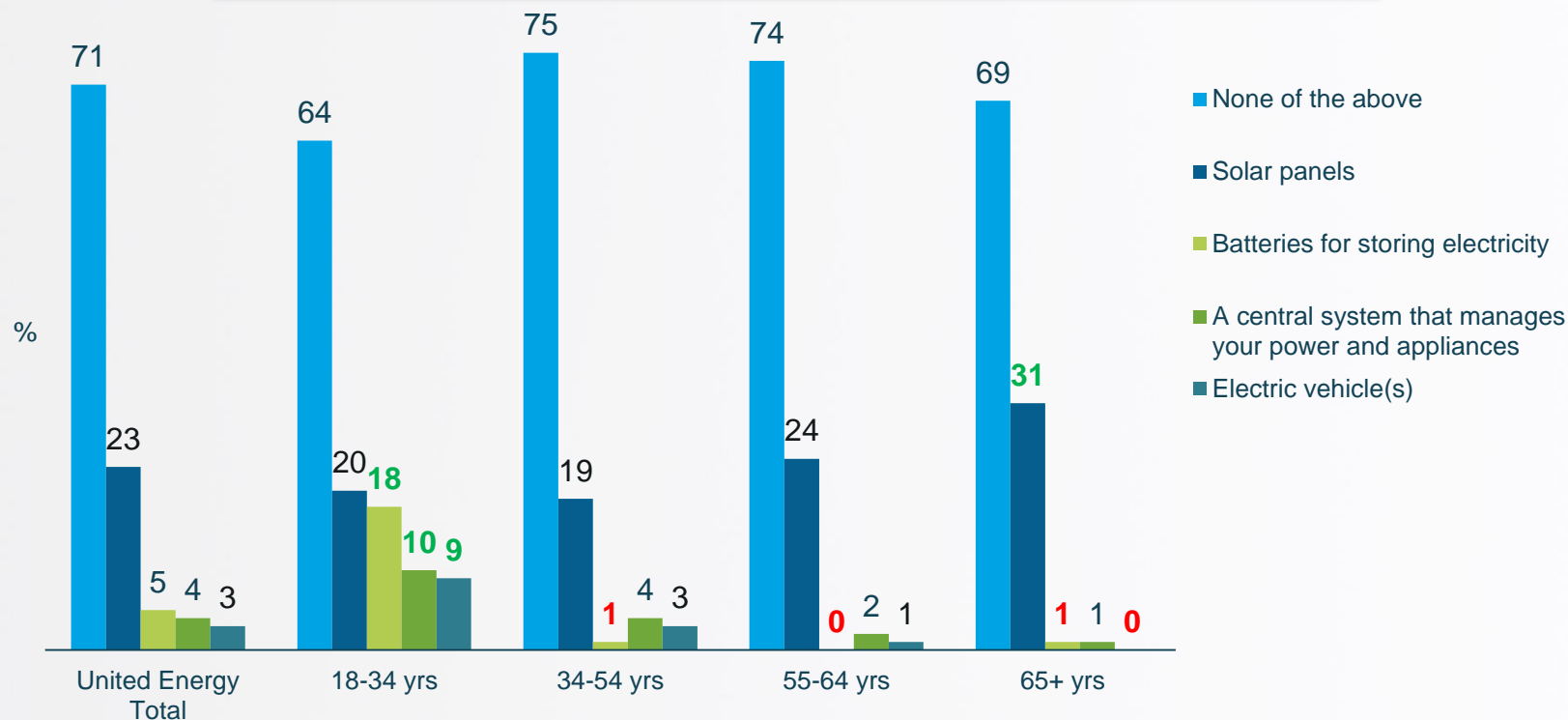
Q18. Does your household currently have any of the following:
Base All respondents n=603

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Installing solar panels was likely amongst 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	United Energy Total %	18-34 yrs %	35-54 yrs %	55-64 yrs %	65+ yrs %
Install solar panels	34	**50**	39	**19**	**19**
Purchase an electric vehicle(s)	19	**33**	21	12	**10**
Purchase a battery	25	26	29	24	21
Install a central system that manages your power and appliances	19	**33**	18	12	**11**

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 nearly half (45%) of respondents intend to have invested in a green energy initiative.

Timeframe for intended green energy adoption

%

In the next 2 years   In 3-5 years time   In more than 5 years time   Don't know

Legend:
- United Energy Total
- 18-34 yrs
- 34-54 yrs
- 55-64 yrs
- 65+ yrs

Data values shown: 56, 47, 45, 39, 38, 34, 30, 26, 23, 17, 13, 11, 8, 16, 13, 11, 7

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Saving money was the biggest incentive for likely installation of green technology. 65+ year olds are also interested in selling back to the grid and being more self sufficient.

Reason for being likely to invest in green energy technology

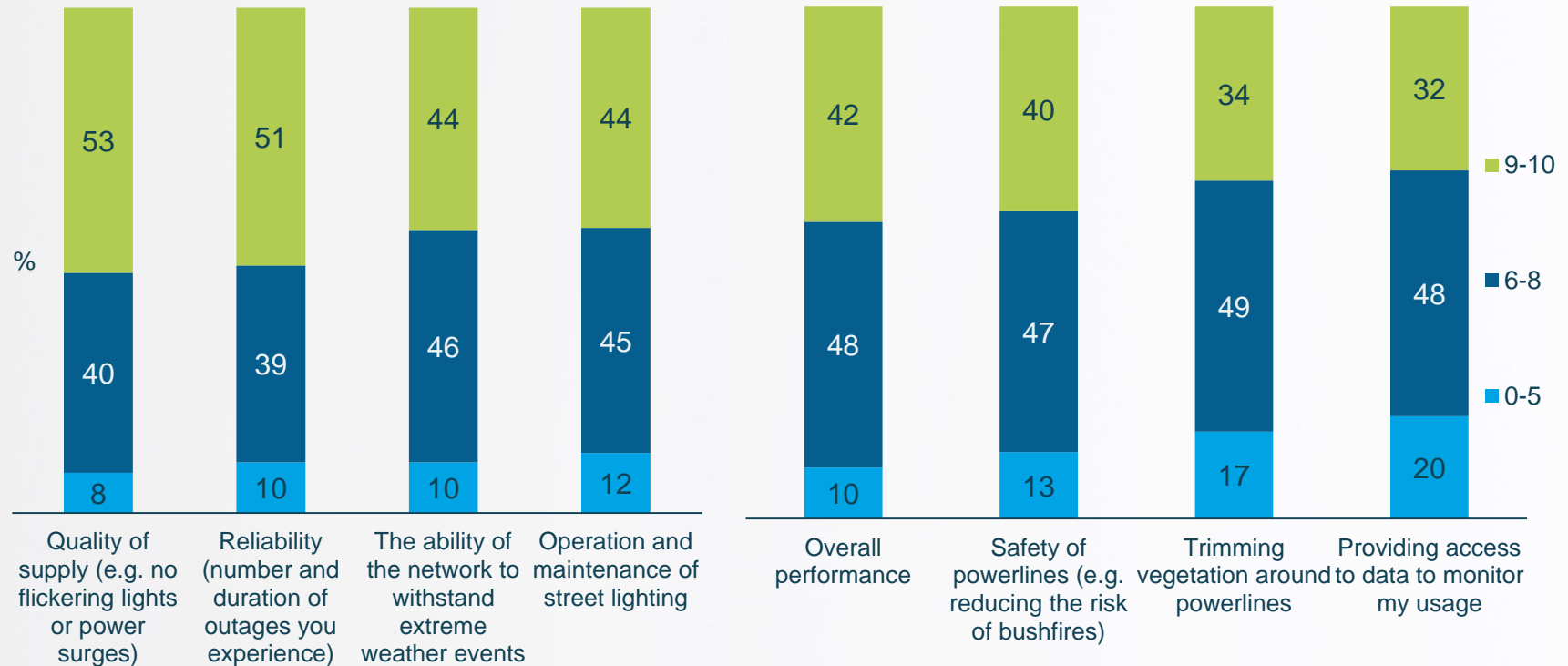| Reason for intention to install various green energy measures	United Energy Total %	18-34 yrs %	35-54 yrs %	55-64 yrs %	65+ yrs %
To save money	87	81	94	89	84
To be more self-sufficient	64	55	63	71	**79**
It is more sustainable	63	65	59	65	67
To sell electricity back to the grid	29	25	23	32	**50**
Other	-	1	-	-	-

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= 283

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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

%

Category	9-10	6-8	0-5
Quality of supply (e.g. no flickering lights or power surges)	53	40	8
Reliability (number and duration of outages you experience)	51	39	10
The ability of the network to withstand extreme weather events	44	46	10
Operation and maintenance of street lighting	44	45	12
Overall performance	42	48	10
Safety of powerlines (e.g. reducing the risk of bushfires)	40	47	13
Trimming vegetation around powerlines	34	49	17
Providing access to data to monitor my usage	32	48	20

Legend:
- 9-10
- 6-8
- 0-5

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=603

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Only 16% respondents indicated they would accept a trade off of reliability for savings. This was significantly higher amongst 18-34 year olds (31%) and significantly lower for those aged over 65 years.

Acceptance of trading off reliability for a reduction in electricity costs

- United Energy Total: 16%
- 18-34 yrs: **31%**
- 34-54 yrs: 16%
- 55-64 yrs: 10%
- 65+ yrs: **3%**
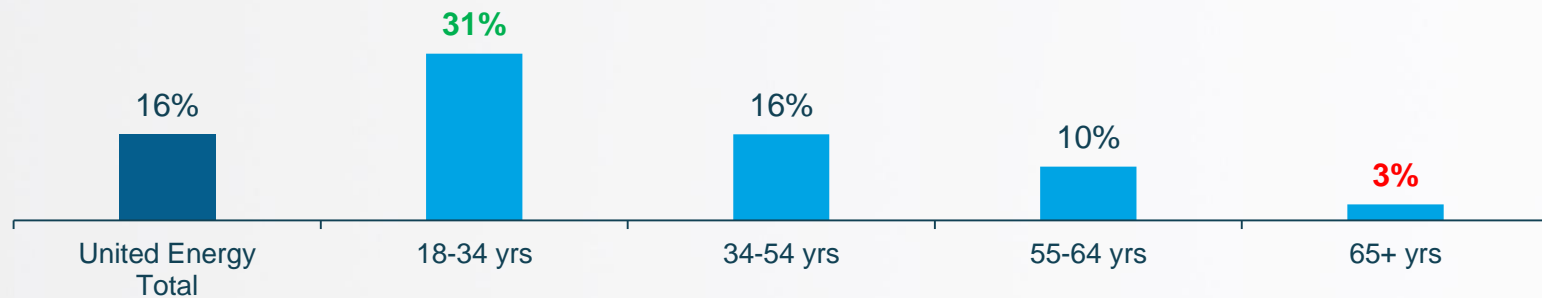
Q23. In principle, would you be willing to accept a lower level of reliability (for example, more or longer outages or more flickering power) if it meant a reduction in your electricity bill?
Q25. Which of the following price ranges does your typical electricity bill fall per month?
Base All respondents n=603

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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

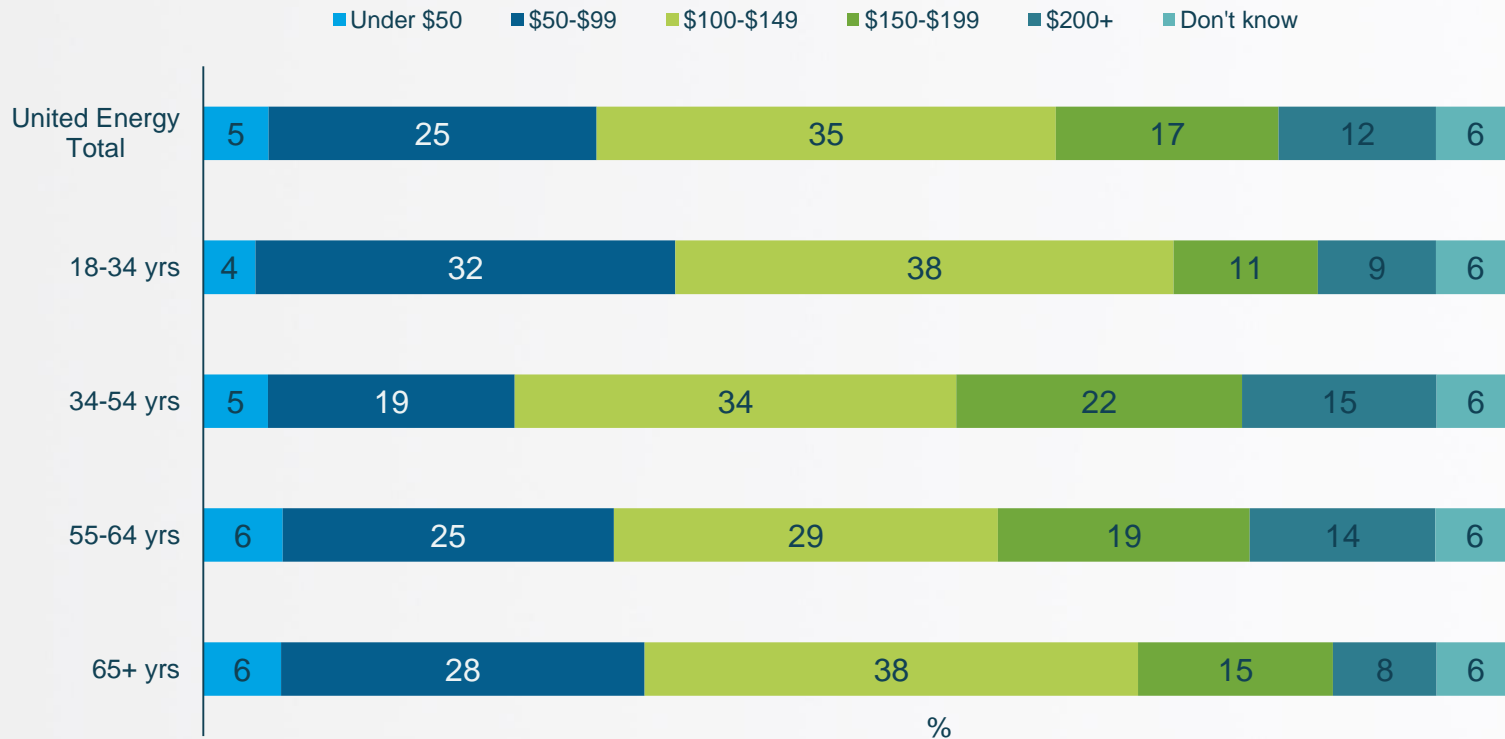|	Under $50	$50-$99	$100-$149	$150-$199	$200+	Don't know
United Energy Total	5	25	35	17	12	6
18-34 yrs	4	32	38	11	9	6
34-54 yrs	5	19	34	22	15	6
55-64 yrs	6	25	29	19	14	6
65+ yrs	6	28	38	15	8	6

%

Q25. Which of the following price ranges does your typical electricity bill fall per month?
Base All respondents n=603

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Most did not have difficulty paying their electricity bill, although the 34-54 age group showed a significantly higher incidence.

Incidence of Difficulty Paying Electricity Bill

United Energy Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
23%	26%	31%	20%	10%

Q26. Have you ever had difficulty paying your electricity bills?
Base All respondents n=603

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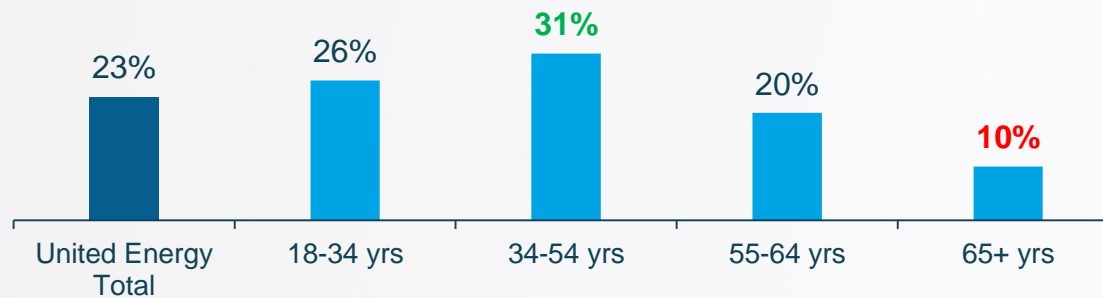
18-34 year olds were more inclined to prefer prices to stay the same throughout the day, however those over 65 years were slightly more likely to prefer variable pricing.

Time of Use Pricing Preferences

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

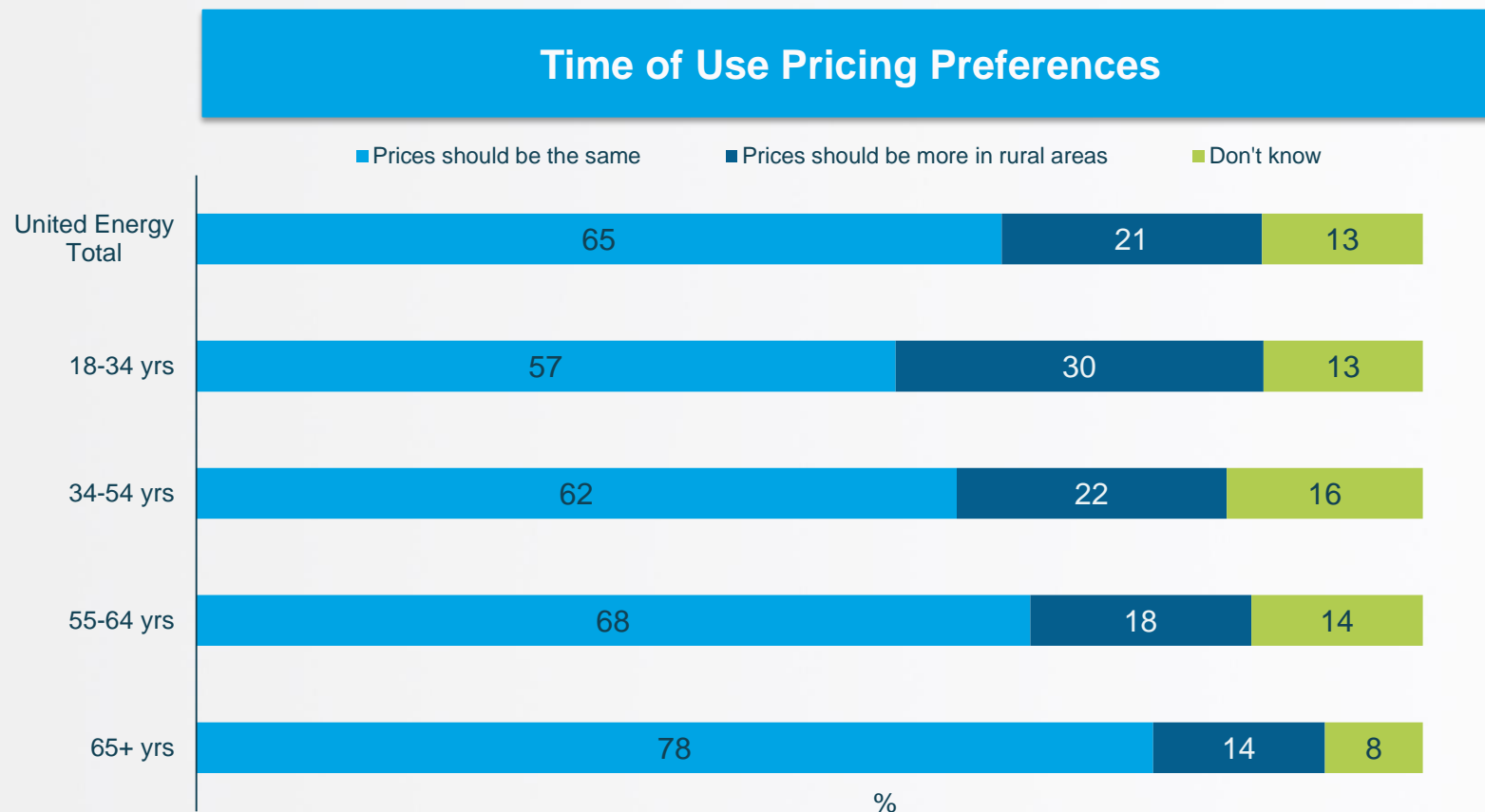|	Prefer stay the same	Prefer varies	Don't know
United Energy Total	44	38	18
18-34 yrs	50	33	17
34-54 yrs	43	37	20
55-64 yrs	43	37	20
65+ yrs	38	46	16

%
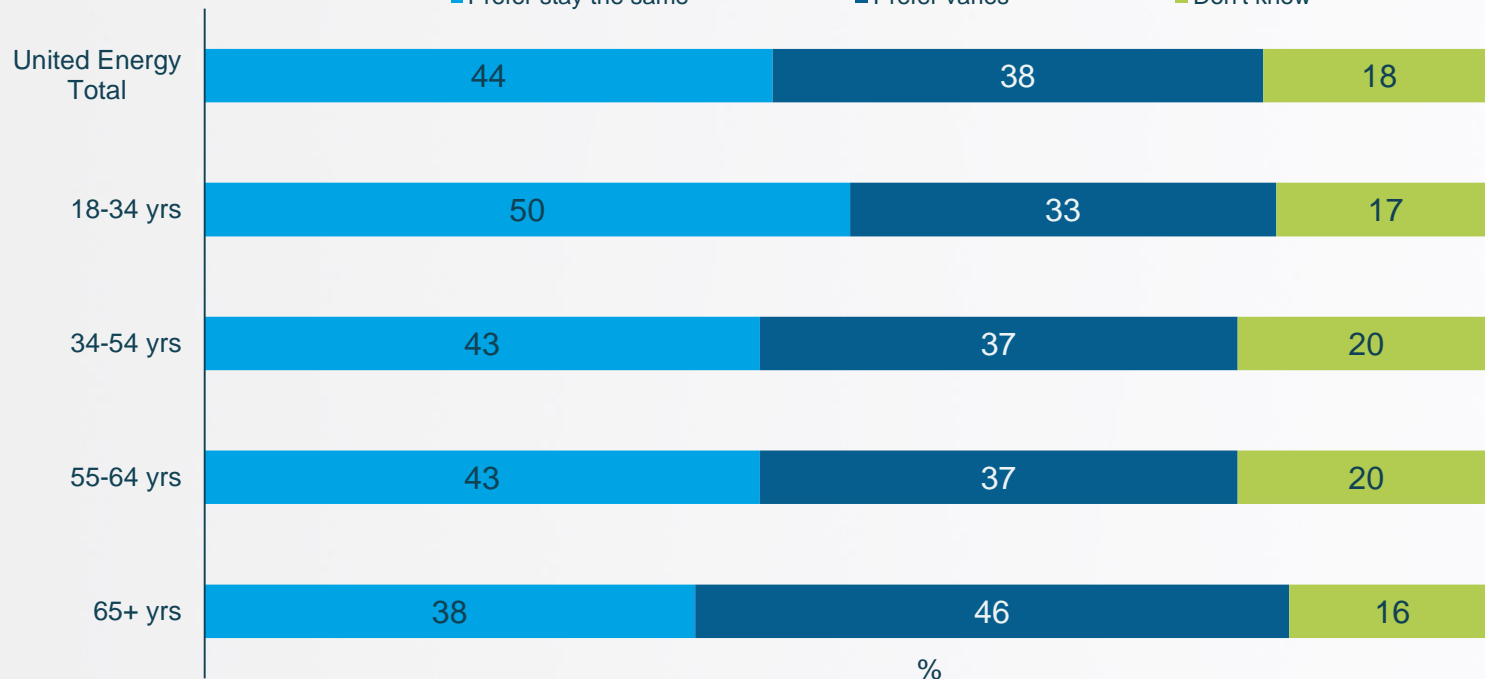
Q27. Do you prefer that the price of electricity stays the same throughout the day regardless of how or what time of the day you use it, or would you prefer that it varies? A variable price would allow you to alter your electricity usage in response to lower and higher prices.
Base All respondents n=603

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There was a preference for pricing to remain the same across urban and rural areas, significantly more so amongst those aged 65+, while 18-34 years were indicate a significant preference for increased pricing in 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
United Energy Total	65	21	13
18-34 yrs	57	30	13
34-54 yrs	62	22	16
55-64 yrs	68	18	14
65+ yrs	78	14	8

%

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=603

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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

$2 rebate — 47%
$4 rebate — 52%
$6 rebate — 59%
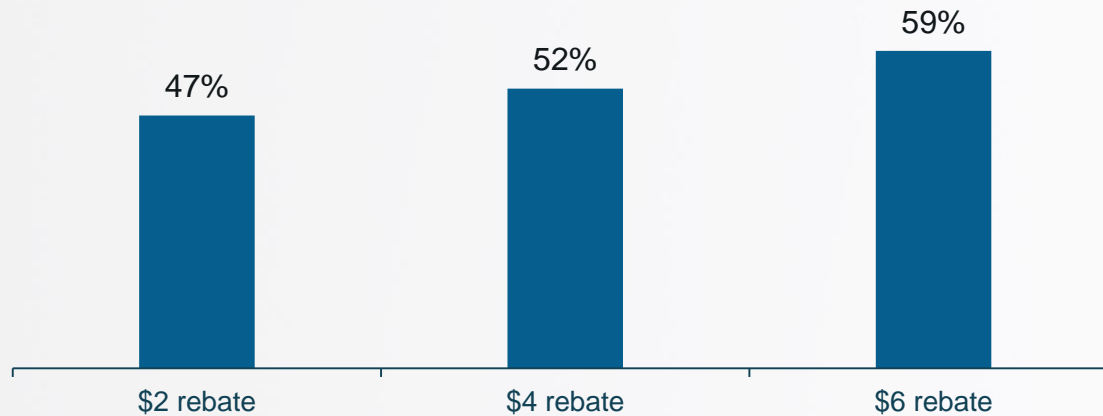
Q29. How interested would you be in a rebate that rewarded you for reducing your electricity consumption during peak times?   How interested would you be if the rebate resulted in a saving of …
Base All respondents n=603

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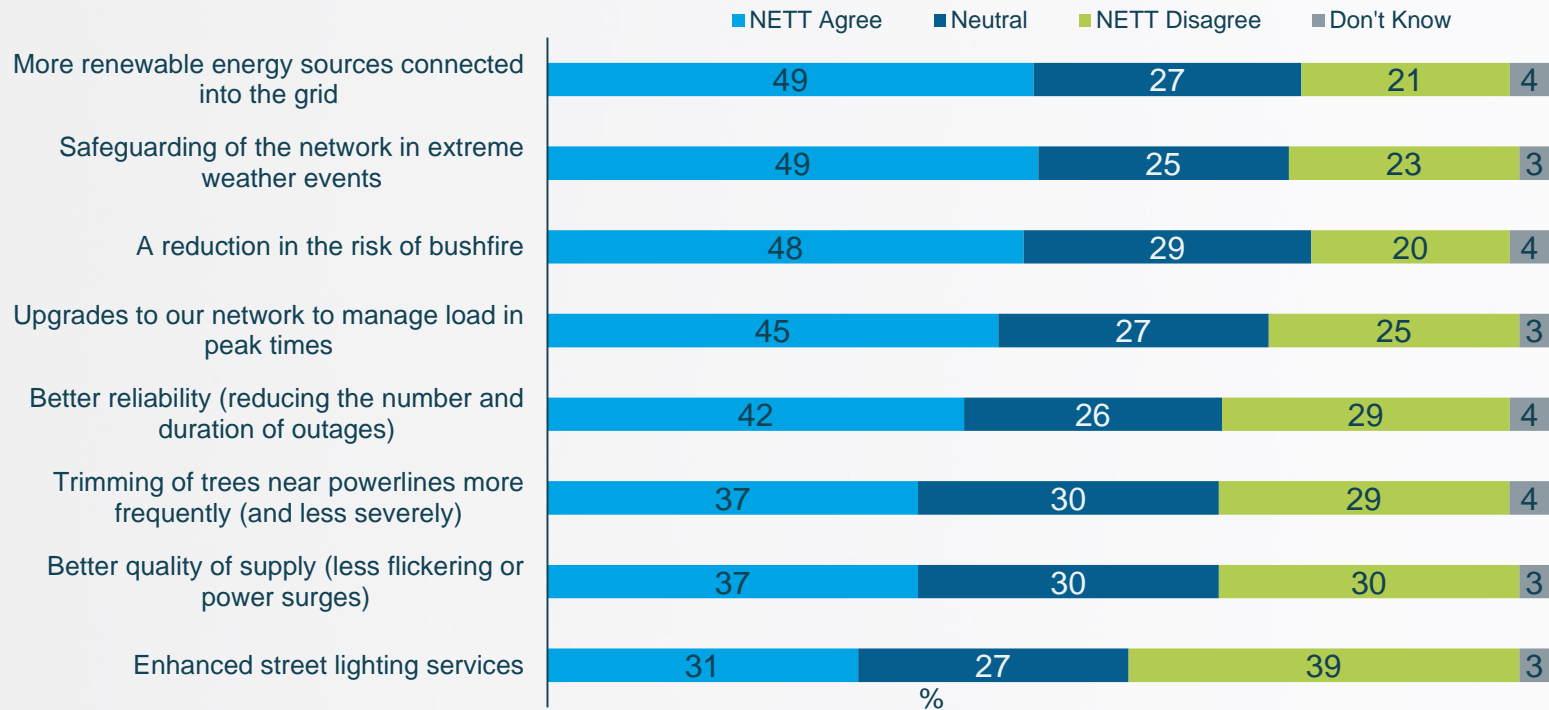# There was more willingness to pay for renewable energy sources. Those aged 65+ years were significantly more willing to pay for quality and reliability.

Willingness to Pay for Various Services

■ 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	49	27	21	4
Safeguarding of the network in extreme weather events	49	25	23	3
A reduction in the risk of bushfire	48	29	20	4
Upgrades to our network to manage load in peak times	45	27	25	3
Better reliability (reducing the number and duration of outages)	42	26	29	4
Trimming of trees near powerlines more frequently (and less severely)	37	30	29	4
Better quality of supply (less flickering or power surges)	37	30	30	3
Enhanced street lighting services	31	27	39	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=603

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Those aged 65+ were signficnalty more likely to agree with most statements, while the 34-54 year age group showed a significantly lower level of agreement with many services.

Willingness to Pay for Various Services by Age

NETT Agree %

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

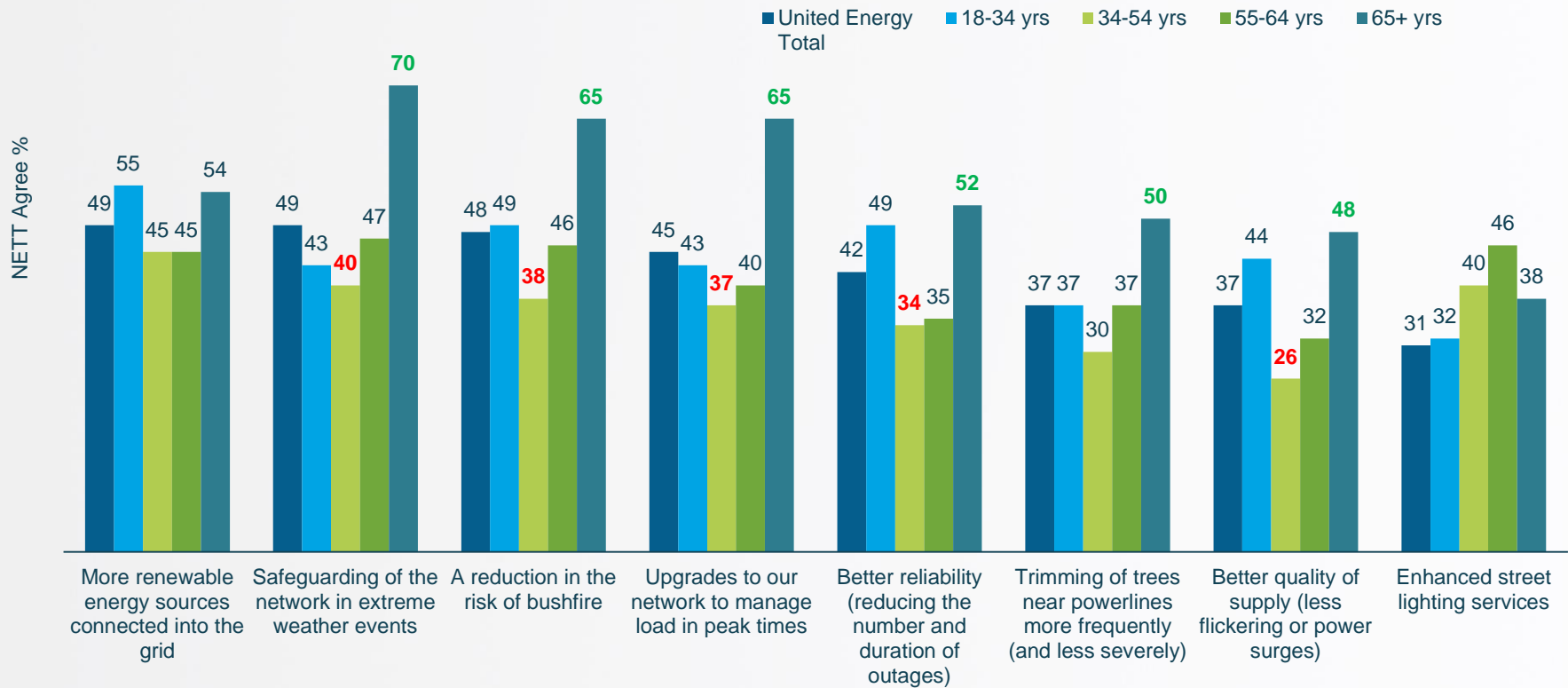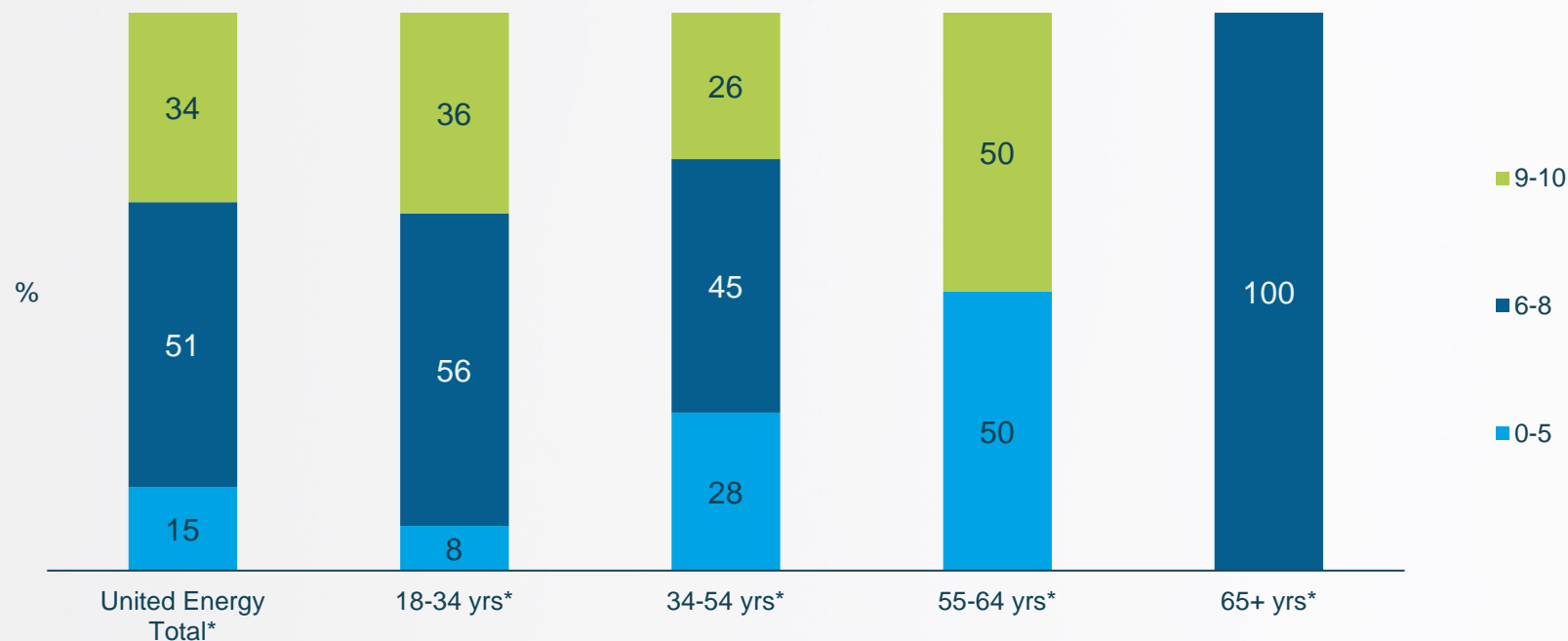| Service	United Energy Total	18-34 yrs	34-54 yrs	55-64 yrs	65+ yrs
More renewable energy sources connected into the grid	49	55	45	45	54
Safeguarding of the network in extreme weather events	49	43	40	47	70
A reduction in the risk of bushfire	48	49	38	46	65
Upgrades to our network to manage load in peak times	45	43	37	40	65
Better reliability (reducing the number and duration of outages)	42	49	34	35	52
Trimming of trees near powerlines more frequently (and less severely)	37	37	30	37	50
Better quality of supply (less flickering or power surges)	37	44	26	32	48
Enhanced street lighting services	31	32	40	46	38

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=603

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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)

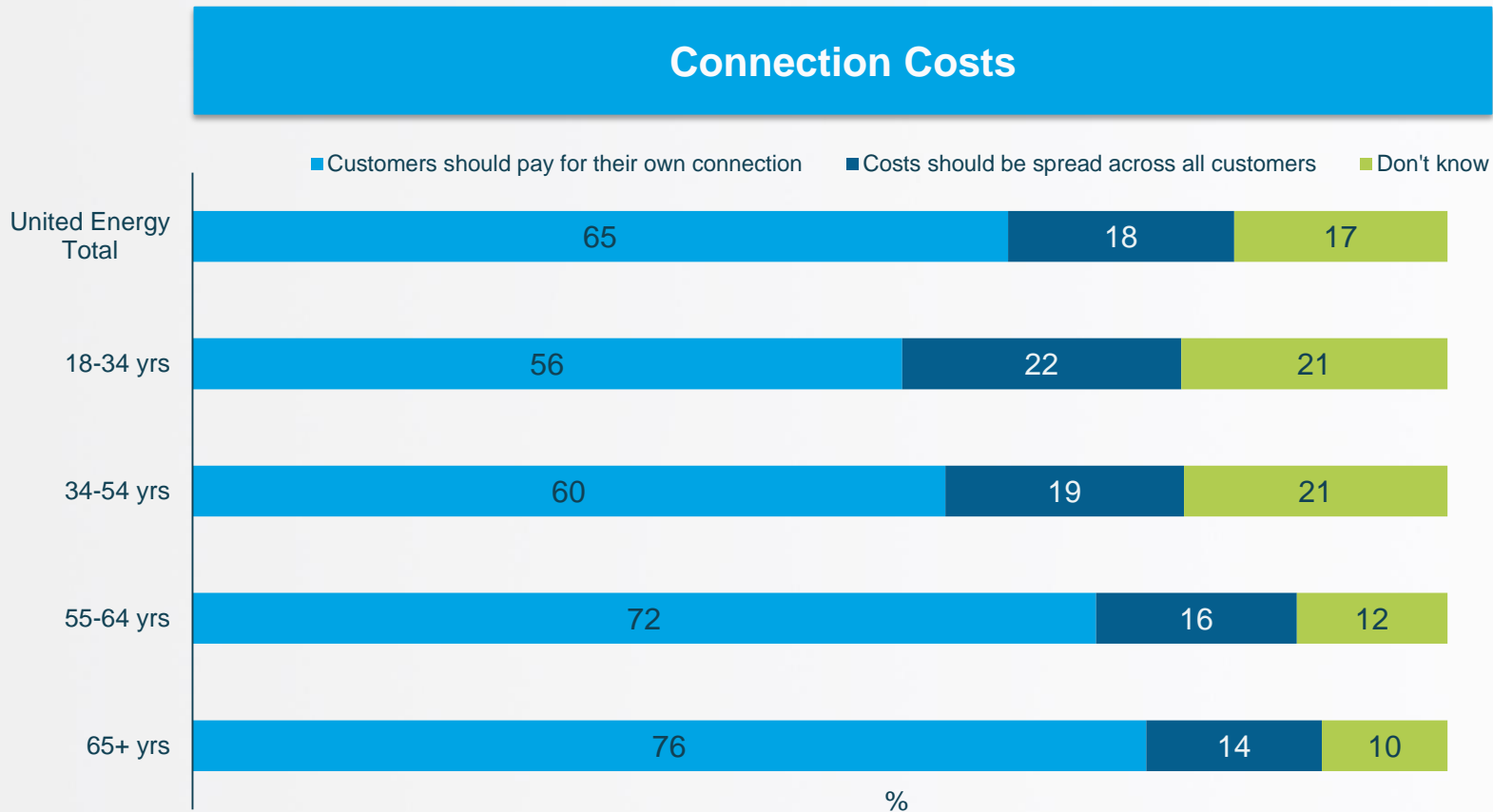| Category	0-5	6-8	9-10
United Energy Total*	15	51	34
18-34 yrs*	8	56	36
34-54 yrs*	28	45	26
55-64 yrs*	50	50	—
65+ yrs*	—	100	—

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=30*
*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 65+yr olds.

Connection Costs

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

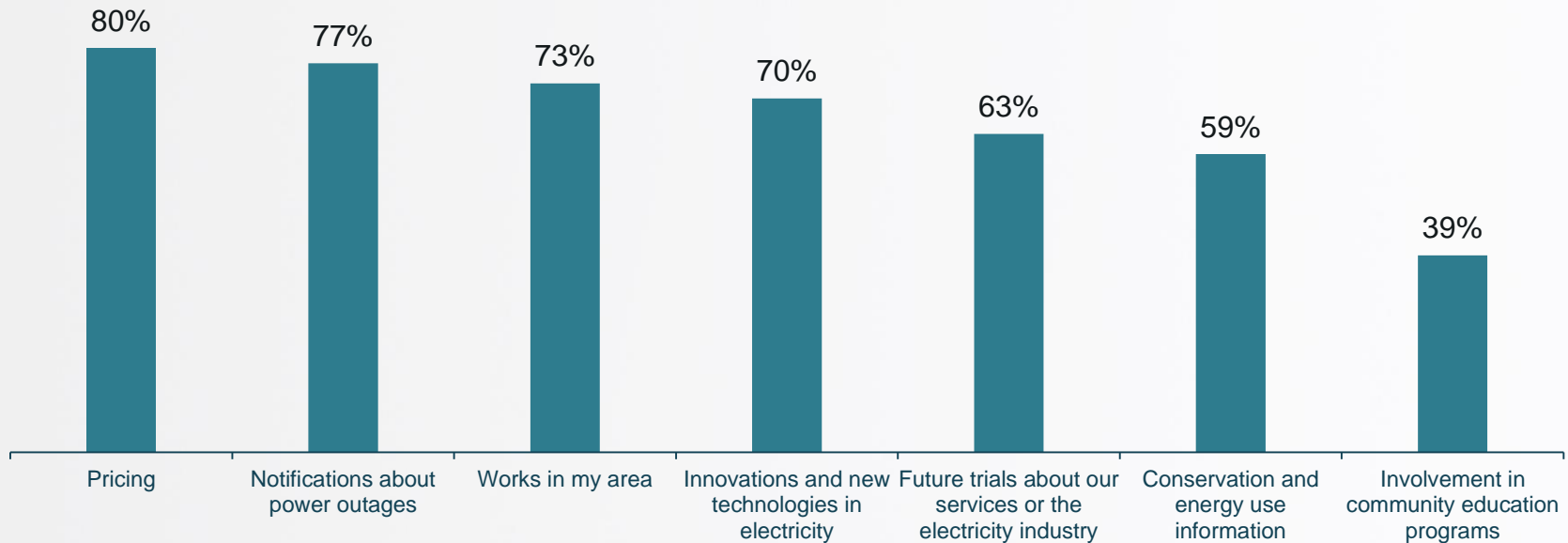|	Customers should pay for their own connection	Costs should be spread across all customers	Don't know
United Energy Total	65	18	17
18-34 yrs	56	22	21
34-54 yrs	60	19	21
55-64 yrs	72	16	12
65+ yrs	76	14	10

%

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=603

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Communication and Engagement

18-34 year olds were significantly more likely to be interested in community education programs (58%) and in conservation energy use information (72%).

Interest in Education Topics

Pricing	Notifications about power outages	Works in my area	Innovations and new technologies in electricity	Future trials about our services or the electricity industry	Conservation and energy use information	Involvement in community education programs
80%	77%	73%	70%	63%	59%	39%

Q36. How interested are you in learning more about the following….
Base All respondents n=603

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Residential Survey
Phase II
Prepared for United Energy