



# Residential Survey | Phase 4

United Energy

September 2019



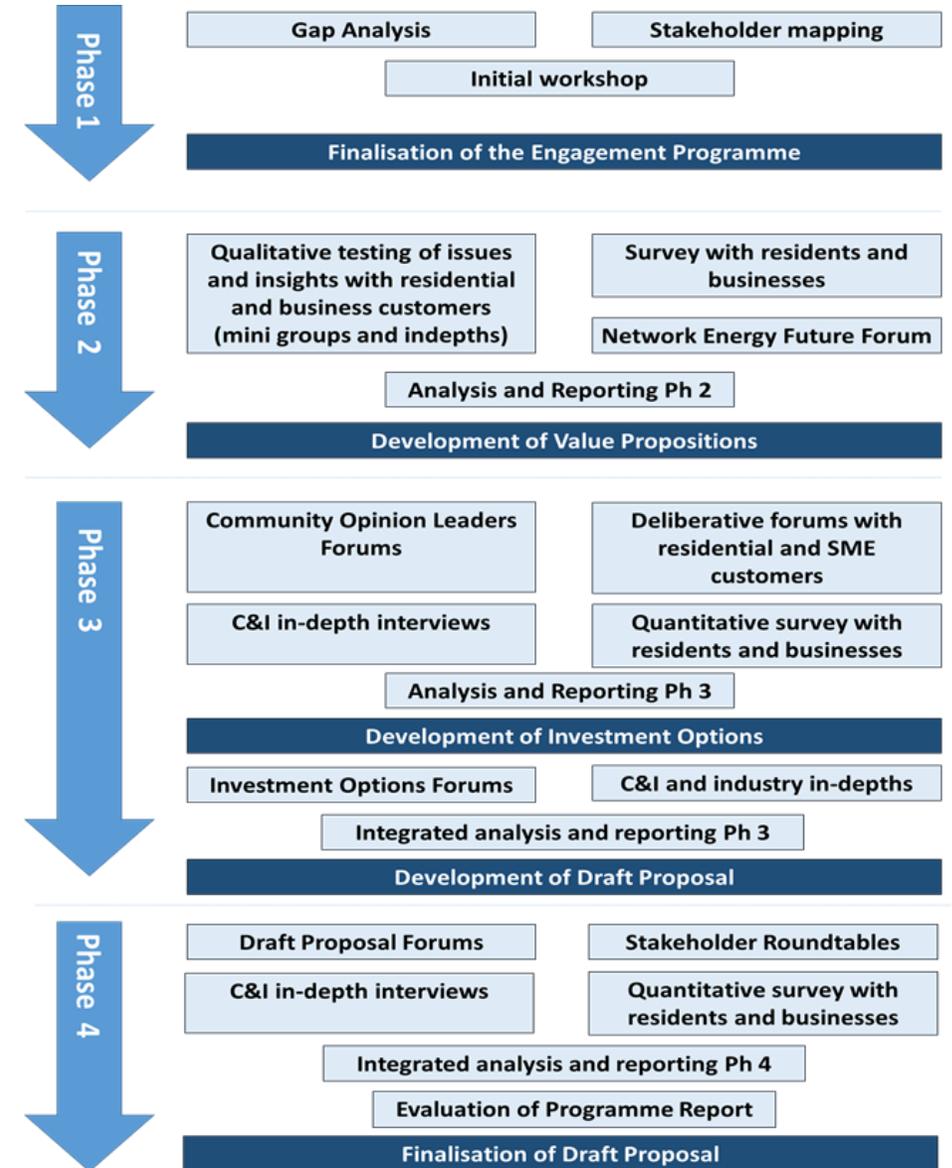
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# BACKGROUND AND CONTEXT

- 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 2021-2026 regulatory period.
- To help shape this regulatory proposal, United Energy is keen to further understand customer priorities, how they see the future, and to assess the Draft Plan.
- Woolcott Research and Engagement has been commissioned to conduct customer and stakeholder engagement to input into the preparation of the regulatory proposal.
- The business developed the Energised 2021-2026 program which includes four phases of customer and stakeholder engagement. We are currently in Phase 4.
- The aims of this phase are to investigate key issues for the network in more detail and fine tune the proposals for the Draft Plan.



# METHODOLOGY

- The objective of the current survey was to test which options customers preferred in the context of the total bill impact. Although respondents were asked for their choices for each question, and then had a chance to change these choices in the context of the whole bill impact, the results shown in this report are their 'final' answers in the context of the bill impact.
- The survey was conducted online and n=600 completes were obtained.
- The online respondents were sourced through an online panel provider, used solely for research purposes.
- The survey was live from 20/08/2019 to 07/09/2019.
- Data was weighted during the analysis by age and gender to reflect the United Energy area.
- Significance testing has been carried out at the 95% confidence interval. Results are shown in **bold green** where significantly higher and **bold red** where significantly lower than the total.
- In this report vulnerable customers are those who have had difficulty paying their electricity bills in the last 12 months, e.g. had to borrow money, had to ask for an extension or paid late, been on a special payment plan or been disconnected due to inability to pay.
- LOTE are customers who speak a language other than English at home.
- Note that due to rounding, percentages may not always add to 100

## The survey covered the following areas:

- Knowledge and literacy
- Communication and customer service
- Access to real time data
- Solar enablement
- Digital network
- Resilient network
- Overall package
- Affordable network
- Demographics



# KEY FINDINGS

## Distributor perceptions

- Similar to last year, most residential customers did not know the name of their electricity distributor (82%), with many confusing their retailer and distributor.
- When prompted just over half of respondents are aware that the distributor responds to electricity outages, maintains poles and wires and gets electricity to their homes.
- Reliability of supply and maintaining affordability continue to be the two most important values.

## Improving customer service

- While most had not contacted their electricity distributor via phone (76%), they thought that no change was needed to the speed of answering calls (80%).
- Text message is the preferred communication method for outages and faults, and email for consultation and other topics.
- Current communication around planned outages is felt to be adequate (6% or less dissatisfaction for time and quantity of information).
- Continuing to remotely read smart meters is perceived to be important (60%).

# KEY FINDINGS

## Access to real time data

- There is interest, especially amongst higher usage households, in using real time data to:
  - Monitor and adapt behaviours (50%);
  - Understand which appliances are using the most power (40%); and,
  - Checking to see if usage was increasing or decreasing from the previous year (37%).
- Although only 21% state that they wouldn't use it at all, only a third are willing to pay extra for more timely data.

## Solar enablement

- Less than half of respondents with solar installed report that they still would have done so if they could not export.
- Only a third of respondents who do not currently have solar say they would install solar if they cannot export (34%).
- Saving money (86%) and environmental outcomes (52%) are key motivating factors to solar installation.
- 81% of respondents feel that customers should be able to export if they want to but there is a preference for only solar customers paying the additional cost to ensure this is possible.
- Those who believe that the costs should be smeared, think that the ability to export solar back to the grid should be increased up to 5kW (32%) or unlimited (32%).

# KEY FINDINGS

## Digital and resilient network

- 62% of respondents indicate that they want United Energy to invest in technology to improve reliability and safety, with a slight preference to encourage renewable energy uptake (33%).
- More than half of respondents (57%) are not willing to pay more to increase pole replacements.

## Affordable network

- 51% of respondents indicate they are willing to change their electricity usage times.
- It is felt that 'time of use' pricing should be an 'opt in' system (53%), rather than opt out (21%).
- Over half (56%) of respondents are interested in shifting their usage if they receive a monetary incentive with a further 10% interested dependant on the payment amount.

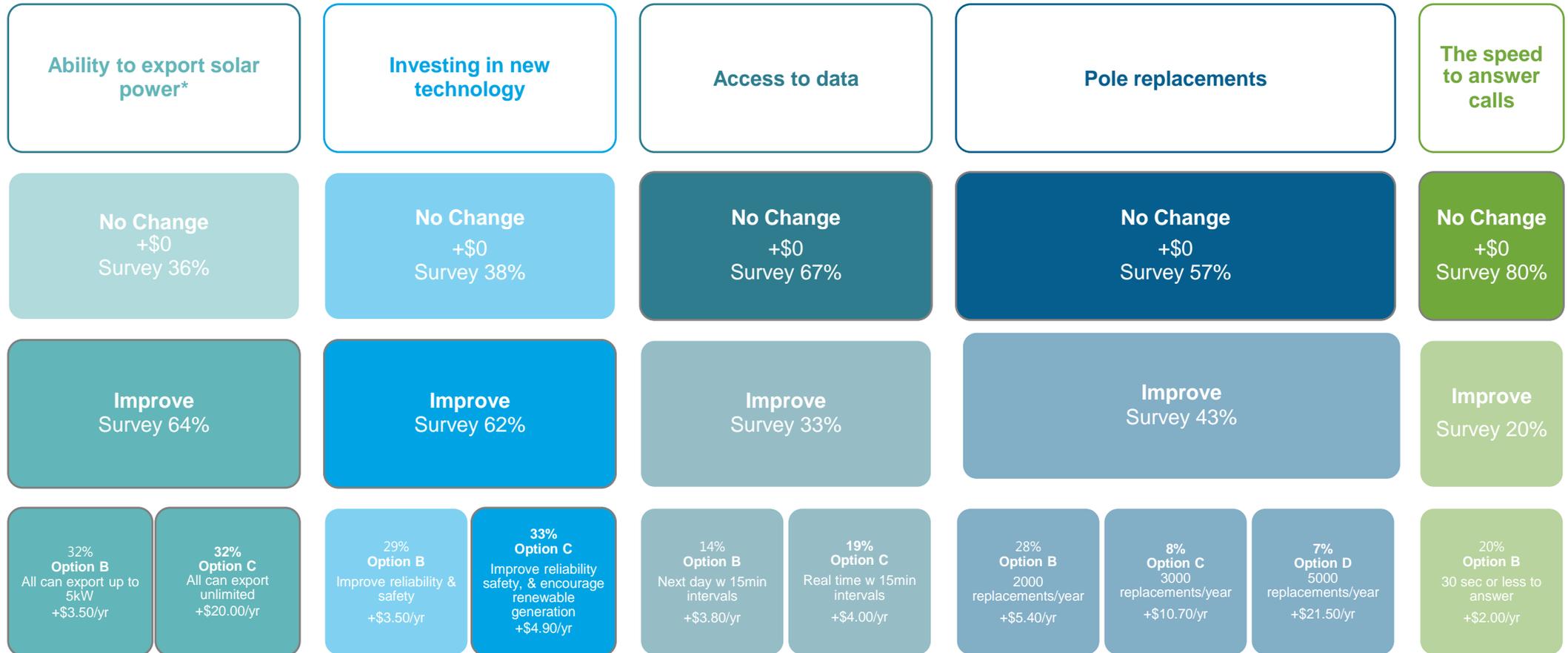
# KEY FINDINGS

## Overall package for 2021-2026

- When respondents were given the opportunity to look back over their choices in the context of the total bill impact, there were only slight changes made, the tendency being to choose options that involved paying more for improvements.
- Out of all the topics there is most willingness to invest in technology for reliability and safety (62%).
- Overall, 29% of respondents are *not* willing to pay for any changes, with 62% of respondents willing to pay up to \$15.00 extra/year for improvements.
- On average, United Energy respondents are willing to pay \$6.86 additional on their annual bill.

# KEY FINDINGS

## Payment preferences



\* Note that only a sub-set of the sample were asked this question (those who believed that all customers should pay). However, the majority believed that solar customers should pay rather than all customers.

# DETAILED FINDINGS



# **DISTRIBUTOR PERCEPTIONS**



# UNPROMPTED AWARENESS OF DISTRIBUTOR

Perceived name of electricity distributor   Unprompted	Total 2019 (n=600) %	18-34 Yr olds (n=149) %	35-54 Yr olds (n=205) %	55+ Yr olds (n=246) %	Total 2018 (n=601) %
AGL	18	11	20	20	18
United Energy	16	8	12	24	16
Origin	8	6	9	8	9
Energy Australia	7	7	6	7	8
Simply Energy	4	4	5	3	6
Red Energy	6	6	5	7	5
Lumo	2	1	2	1	4
Alinta	3	4	3	3	2
Momentum Energy	1	2	3	0	1
Ausnet	2	2	3	1	1
Dodo	1	2	1	0	1
Click Energy	2	2	1	1	1
Powershop	1	2	0	0	1
GloBird Energy	1	1	1	1	1
Don't Know	25	36	25	19	23
Other	3	3	2	3	2

- Fewer than 1 in 6 respondents were aware that United Energy was their distributor (similar to last year).
- Awareness was significantly higher for those aged over 55 years (24%), and significantly lower for customers aged under 34 years (8%).
- Younger customers were more likely to say they did not know who their distributor is (36%).
- Vulnerable customers were significantly less likely to mention United Energy as their distributor (9%), as were LOTE customers (9%).

Q9. Firstly, 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=600)

# AWARENESS OF ROLES OF DISTRIBUTOR

Perceived roles	Total 2019 (n=600) %	18-34 (n=149) %	35-54 (n=205) %	55+ (n=246) %	Total 2018 (n=601) %
Responding to electricity outages and interruptions	59	48	59	67	53
Maintaining electricity poles and wires	53	38	52	63	50
Getting electricity to your home	59	48	59	67	56
Connecting electricity to new homes	48	31	53	55	46
Long term planning to ensure a resilient electricity supply	34	21	31	44	31
Trimming vegetation around powerlines	31	12	29	44	31
Maintaining and operating street lighting	37	25	36	46	34
None of the above	24	33	20	22	28

- Respondents aged over 55 years were significantly more aware of many of the roles of United Energy, while those aged between 18-34 years or from a LOTE background were significantly less aware.
- Vulnerable customers were significantly less aware of United Energy's role in connecting electricity to new homes (35%) and responding to outages and interruptions (42%).

Q10. [The distributor's] is the electricity distributor for your area. Which of the following roles were you aware that United Energy did before today?  
 Base: All respondents (n=600)

# RANKED IMPORTANCE OF BENEFITS/VALUES

	Total ranked 1 <sup>st</sup> (%)	18-34 ranked 1 <sup>st</sup> (%)	35-54 ranked 1 <sup>st</sup> (%)	55+ ranked 1 <sup>st</sup> (%)	Index score
Providing a reliable supply of electricity	64	50	61	75	28
Maintaining affordability	25	38	22	19	23
Committed to providing a safe environment for customers and workers	3	4	4	2	12
Use electricity when you want or receive savings for reducing use	2	3	3	0	12
Committed to providing a safe network that mitigates bushfire risks	2	1	4	1	8
Keeping your data and our network secure	1	1	1	1	6
Making it easier for you to connect	1	0	2	0	5
Making it easier for you to export solar and charge your battery	1	0	1	1	4
Making it easier for you to use your data to make informed choices	1	1	1	0	2

- Around two-thirds of respondents ranked providing a reliable supply of electricity as the most important value (64%).
- Respondents aged over 55 years were significantly more likely to rank reliable supply first (75%), while vulnerable respondents and those with higher usage were significantly less likely to (50% each).

Q11. As an electricity distributor, [insert distributor] ensures the safe and reliable supply of electricity, by maintaining poles and wires. [Insert distributor] is not an electricity retailer – they transport electricity to your home while retailers sell you the electricity. From the list below, please choose the five most important things when it comes to powering your home and rank them from one (1) most important to five (5) least important.

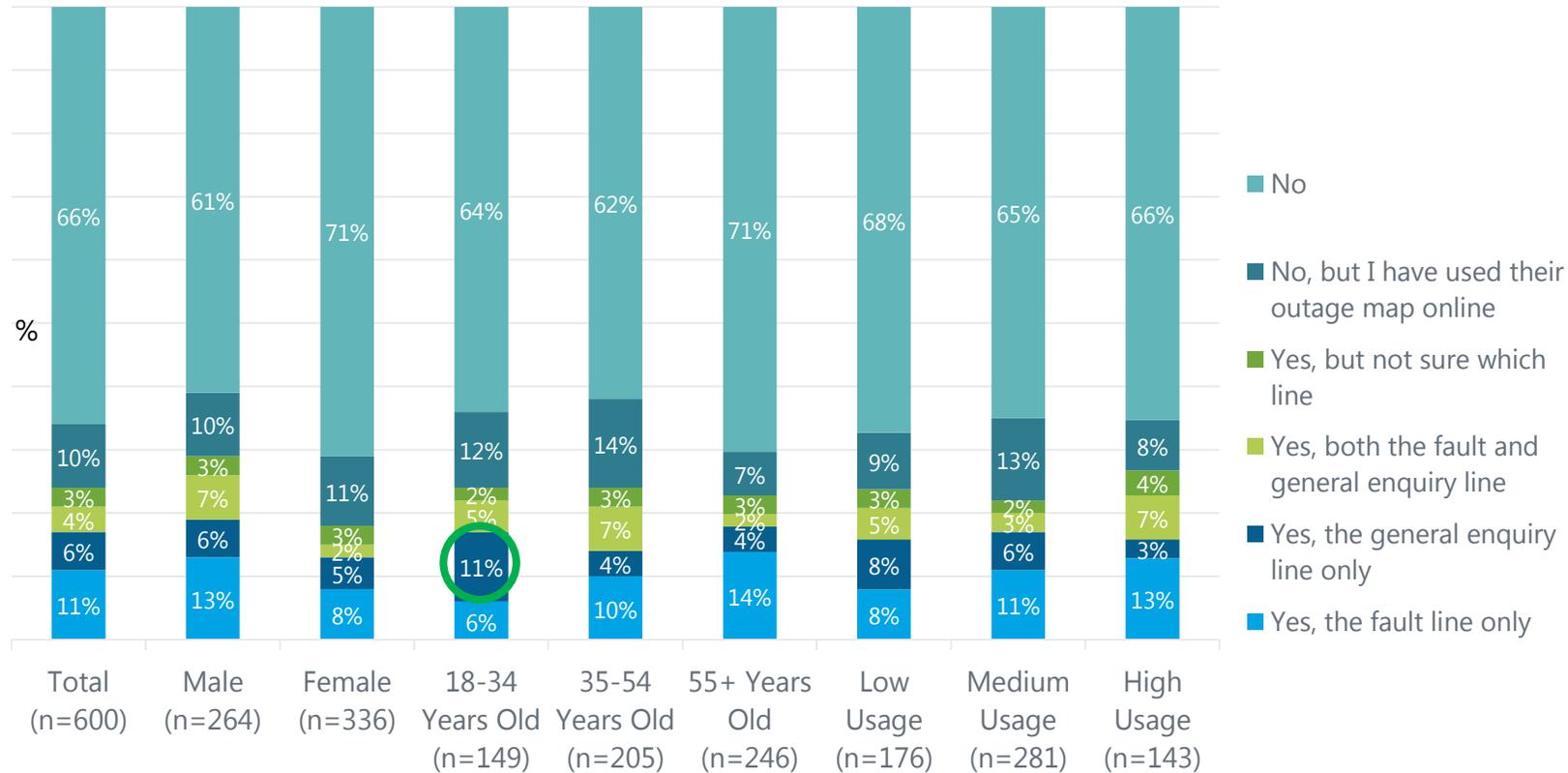
Base: All respondents (n=600)

The index score has been calculated by assigning a value of 5 points to the #1 ranking, 4 points to #2, 3 to #3, 2 to #4 and 1 point to #5 and then adding them together. This score was then indexed to be out of 100.

# IMPROVING CUSTOMER SERVICE

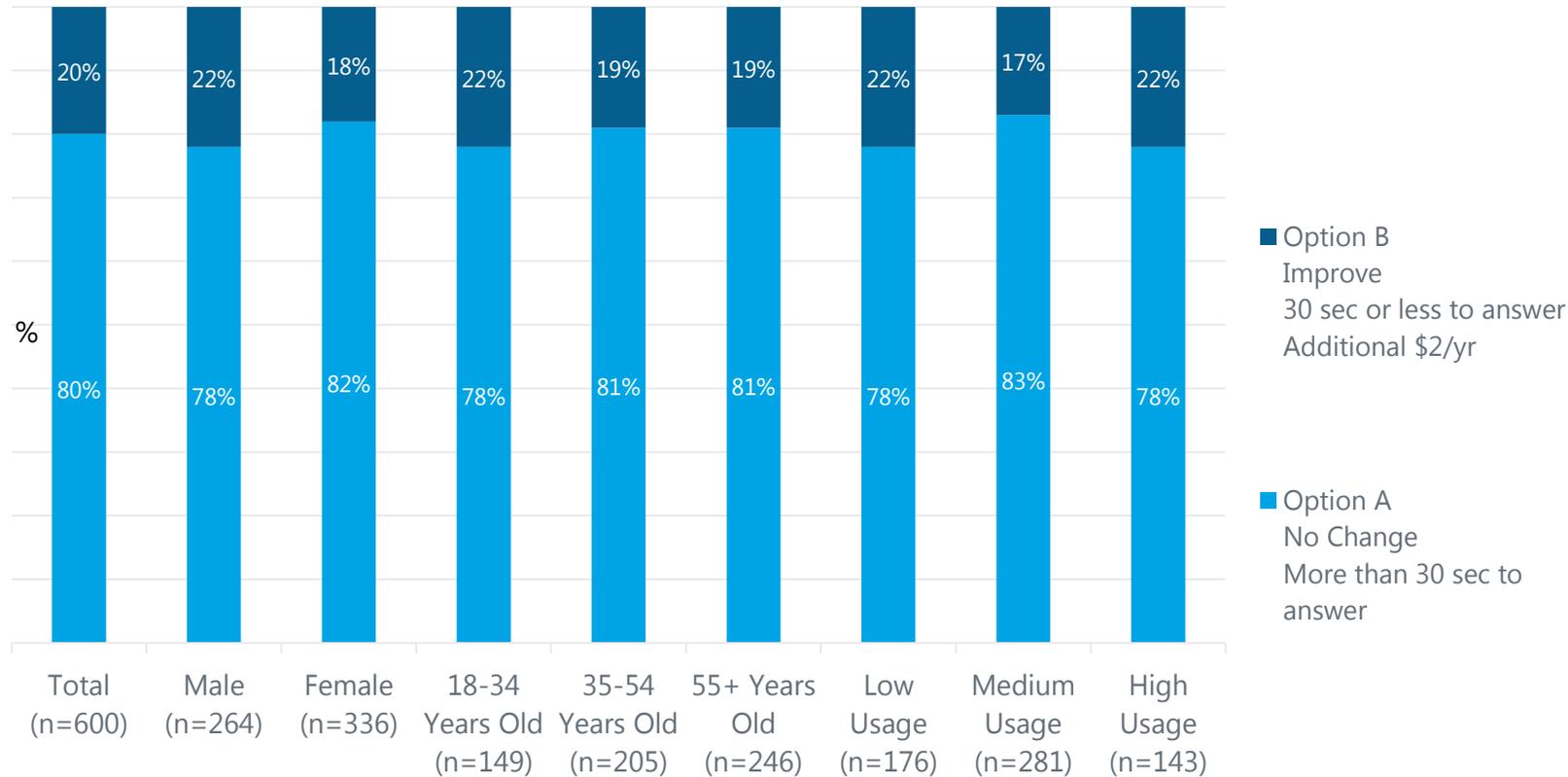


# INCIDENCE OF CONTACTING DISTRIBUTOR



- One quarter of respondents had used United Energy's fault or general enquiry lines (24%).
- Respondents aged under 34 years were more likely to have used the general enquiry line only.
- Vulnerable respondents were significantly more likely to have contacted UE in general (only 48% said no), used the general enquiry line (13%) and both lines (13%) than other respondents.

# IMPROVING SPEED OF ANSWERING CALLS

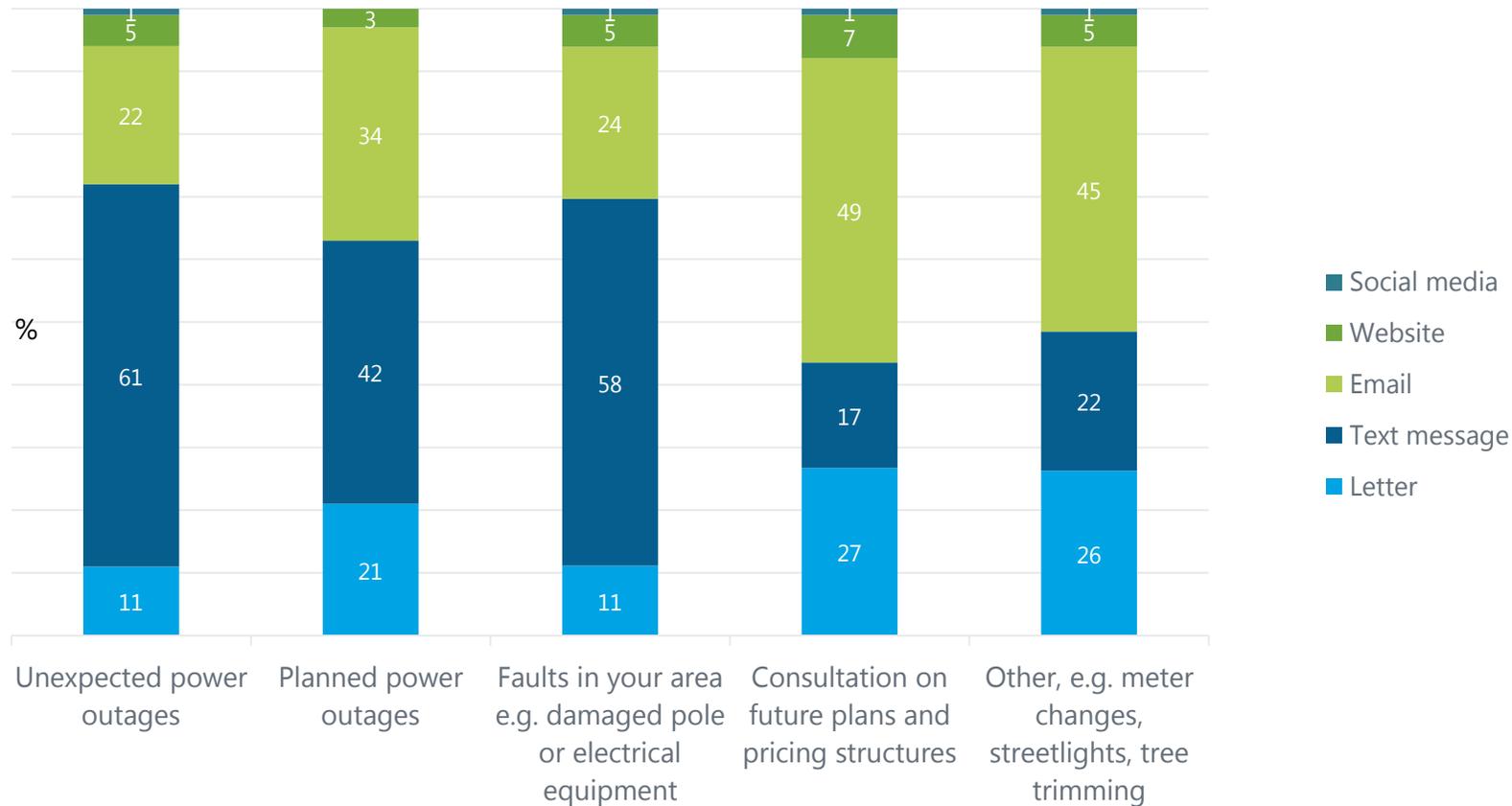


- Four fifths of respondents were happy to leave the length of time to answer calls at over 30 seconds, instead of paying \$2 additional per year to improve the pickup time.
- LOTE respondents were significantly more likely to choose option B than non-LOTE (29%).
- There were no differences by whether or not they had previously called United Energy.

Q14a. Customer service is very important to [the distributor's name]. [Distributor] currently provides two manned call lines: a fault line and a general enquiry line. [Distributor] aims to answer calls to **the electricity fault line** within 30 seconds, while there is currently no standard response time for **the general enquiry line**. [the distributor] can ensure that calls to the general enquiry line are answered within 30 seconds as well, but this would cost a bit more. Which option would you prefer for the time taken for [insert distributor] to answer general enquiries (i.e. non-urgent calls)? *Answers provided after seeing full bill impact.*

Base: All respondents (n=600)

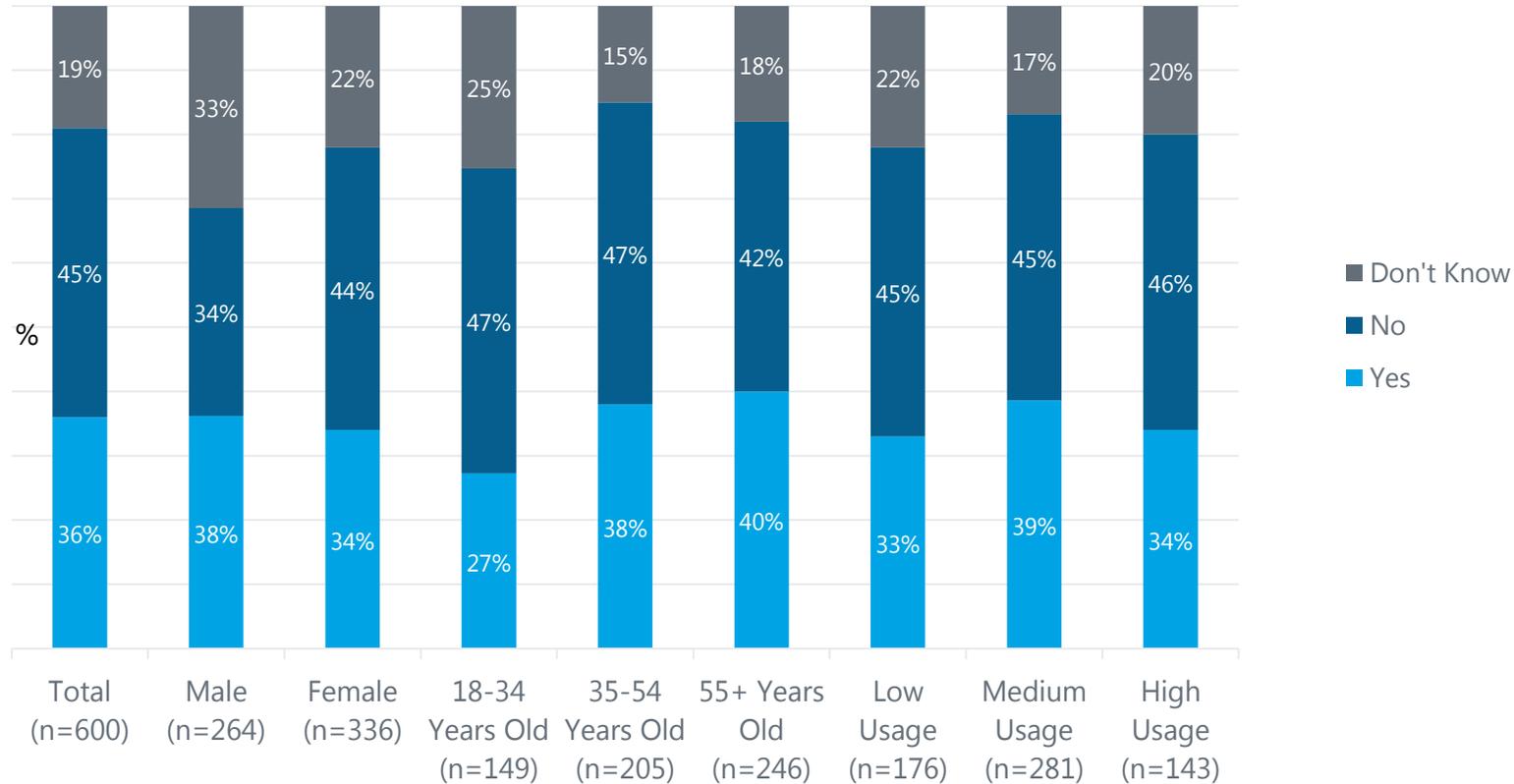
# PREFERRED METHOD OF COMMUNICATION



- Text message and email were the two main preferred channels communication depending on the topic.
- Generally, those aged under 34 years were significantly more likely to prefer communication via the website, and less likely to prefer a letter for any planned power outages.
- Those aged over 55 years were significantly more likely to prefer a letter for consultation, and significantly less likely to prefer text or communication via the website.

Q15. Which method of communication would you prefer [the distributor] to use to communicate with you about the following  
 Base: All respondents (n=600)

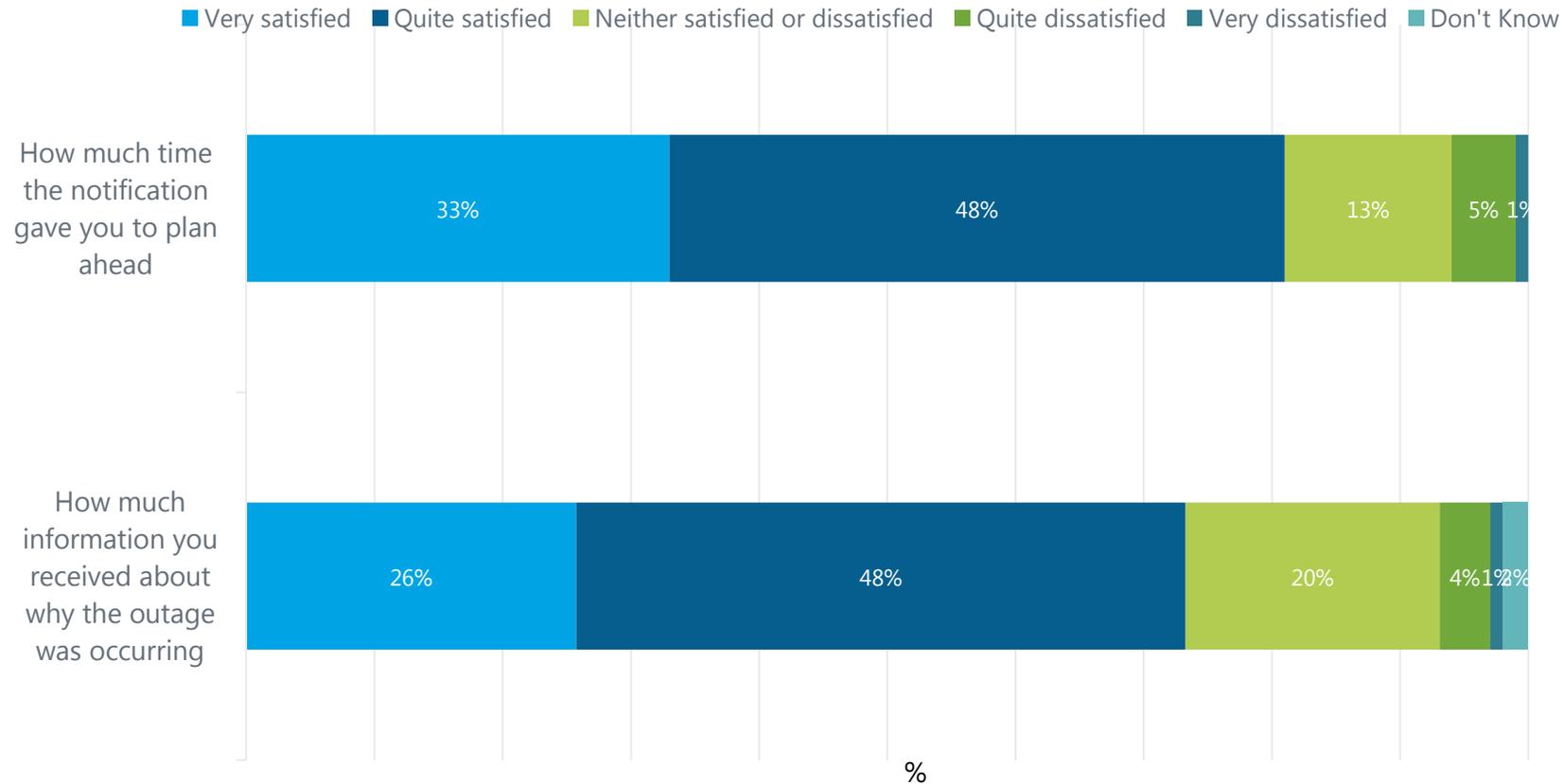
# INCIDENCE OF NOTIFICATION OF A PLANNED OUTAGE



- More than a third of respondents indicated they had been notified about a planned outage.
- There were no significant differences across the groups.

Q16. Have you ever been notified by [the distributor] about a planned outage?  
Base: All respondents (n=600)

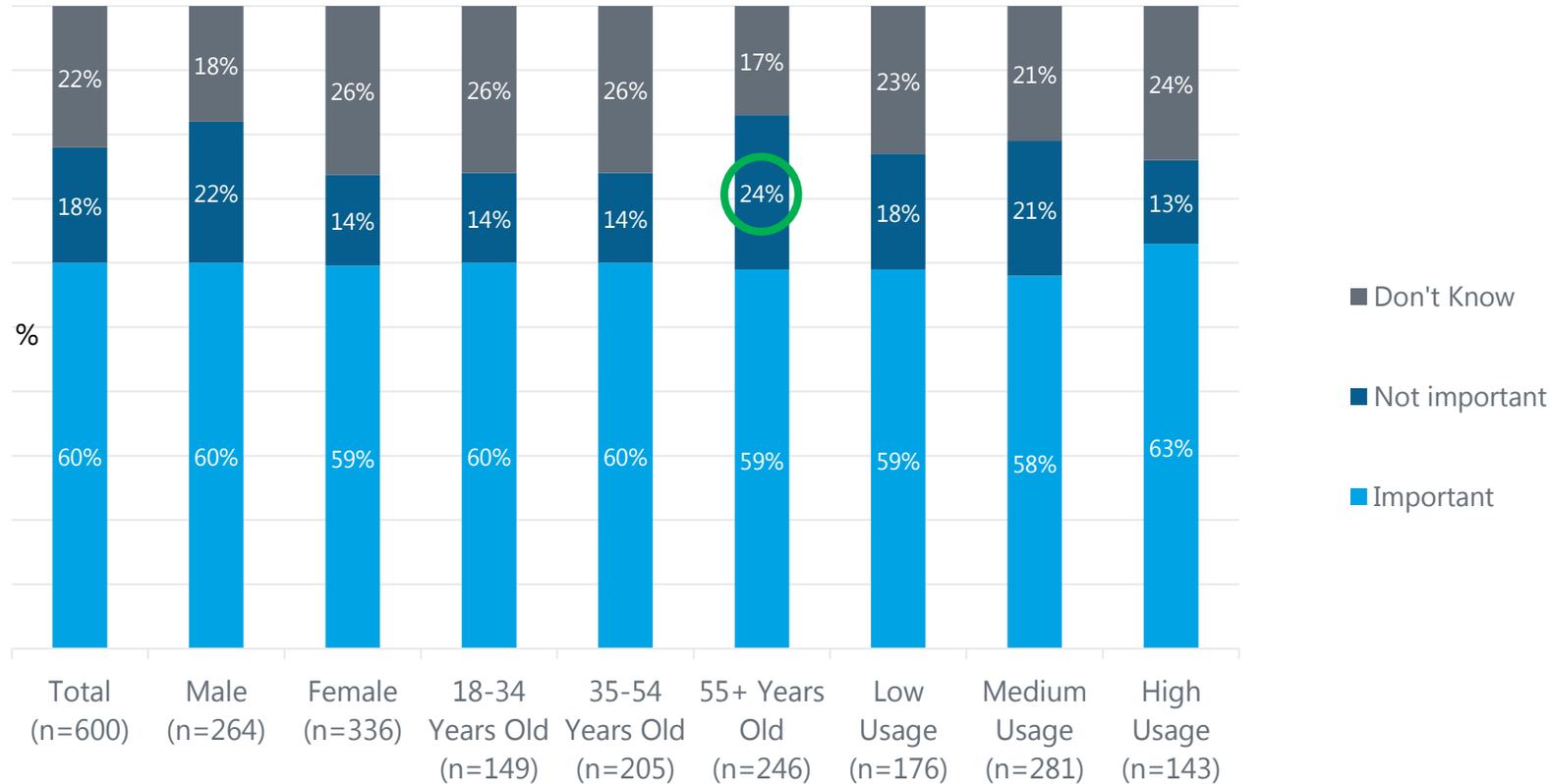
# SATISFACTION WITH PLANNED OUTAGE COMMUNICATION



- Around three quarters or more of respondents who had been notified of a planned outage were satisfied with the time the notification gave them to plan ahead and the information received.
- LOTE respondents were significantly more likely to be dissatisfied with the timing of notification.

Q17. How satisfied were you with...  
 How much time the notification gave you to plan ahead?  
 How much information you received about why the outage was occurring?  
 Base: Respondents who indicated they had been notified of a planned outage (n=210)

# PERCEIVED IMPORTANCE OF REMOTELY READING SMART METERS



- 60% of respondents indicated that it was important for United Energy to continue to remotely read and control the meter.
- Respondents aged over 55 years were significantly more likely to say this was not important.

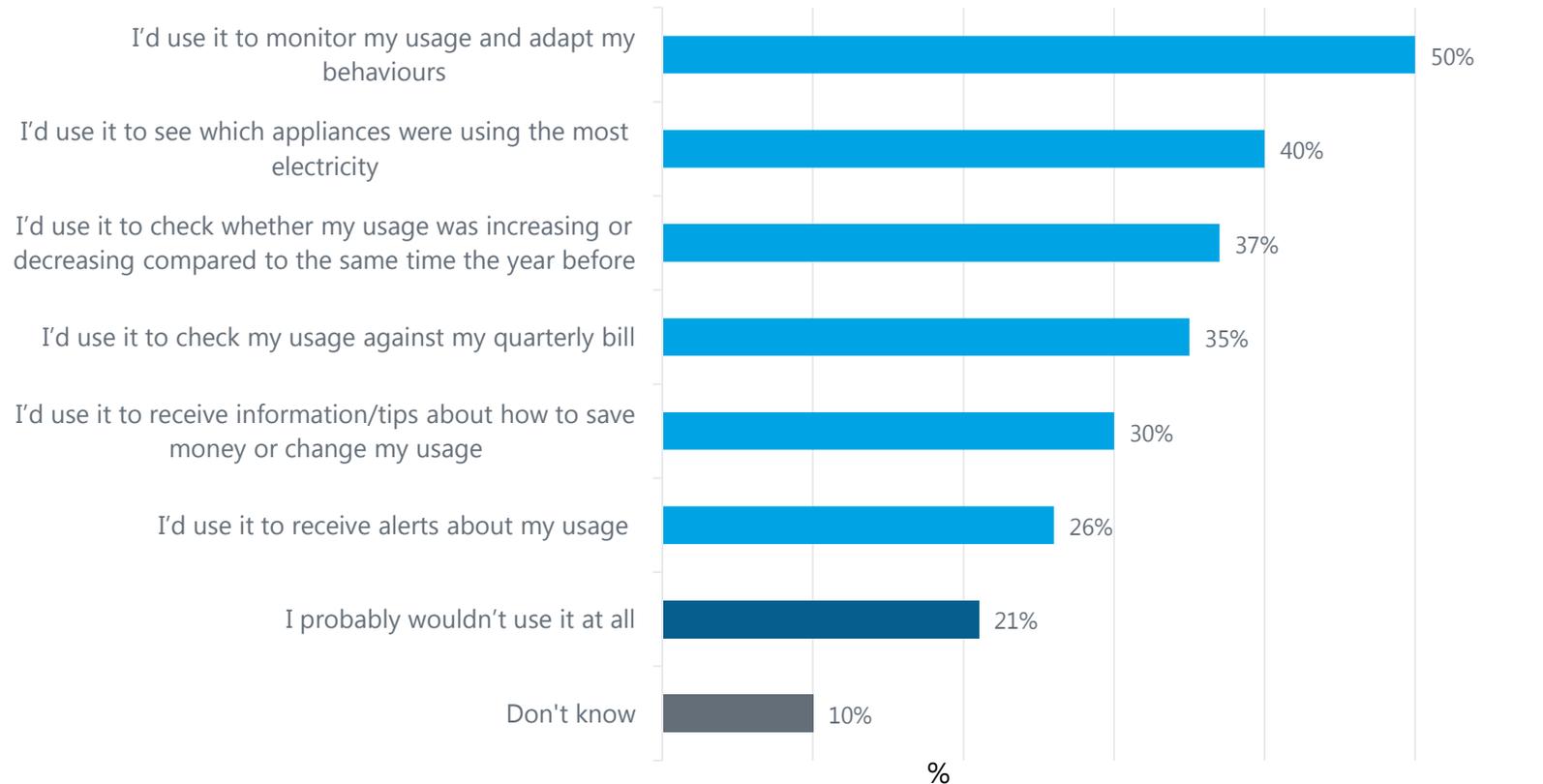
Q18. Almost all Victorian households have a smart meter installed. Smart meters allow United Energy to remotely read your meter, or remotely turn-on and turn-off electricity at your home when you move. This means [the distributor] doesn't have to send someone to the property, making the process quicker and cheaper. How important is it to you that they continue to remotely read your meter and remotely turn your power on and off when you move?

Base: All respondents (n=600)

# ACCESS TO REAL TIME DATA



# INTEREST IN ACCESS TO USAGE DATA



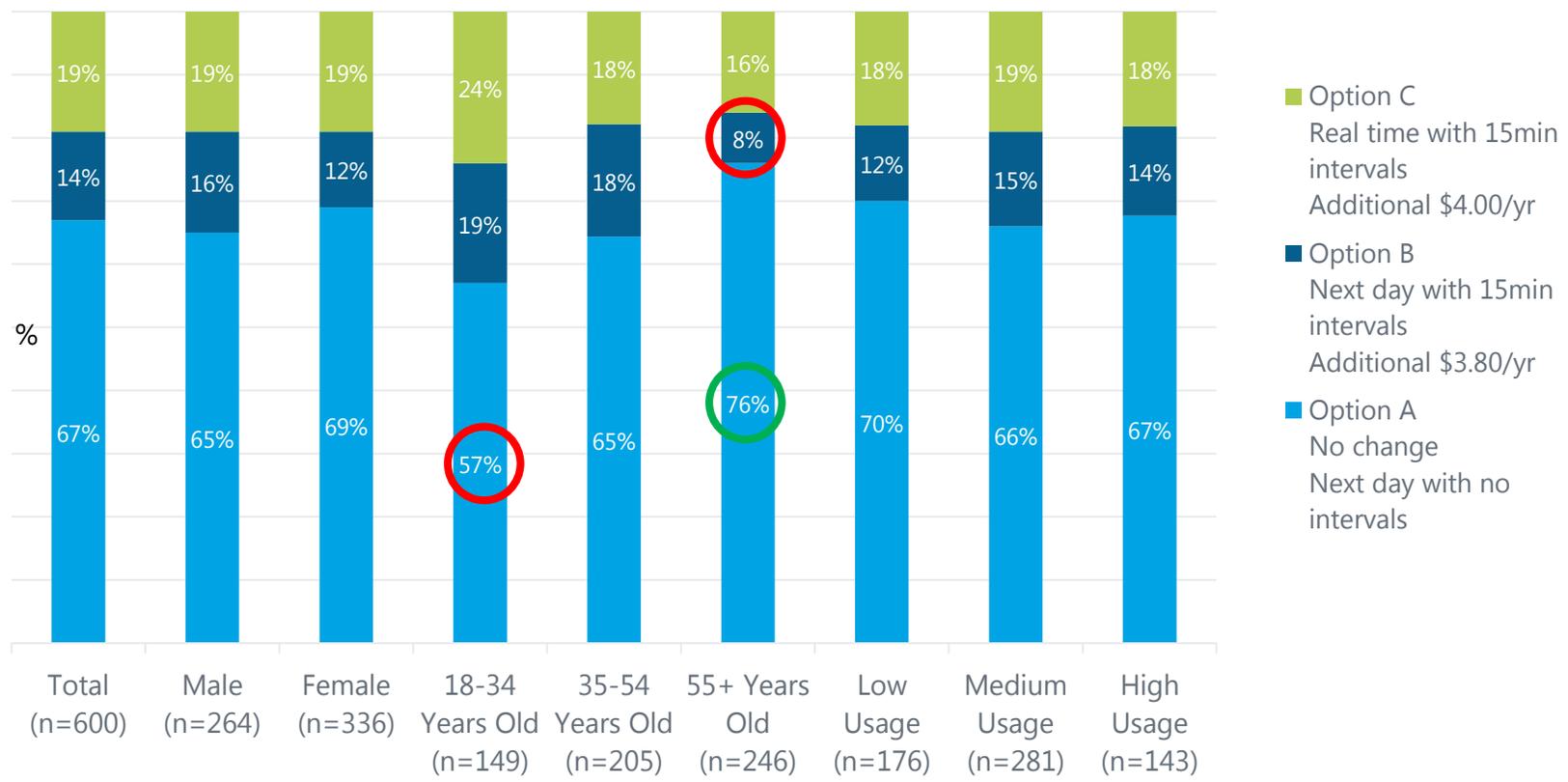
- Half of the respondents indicated they would use data to monitor and adapt their behaviours. This was significantly higher for 18-34 year olds (65%) and LOTE respondents (59%).
- High usage respondents were significantly more likely to say they would check which appliances used the most electricity (50%).
- Respondents aged over 55 years were significantly more likely to say they probably wouldn't use their usage data (34%) compared to 18-34 year olds (5%).

[insert distributor] is considering giving customers access to their electricity usage data in near real-time (every 15-minutes) which would mean you could make on-the-spot decisions about your usage. It would also allow customers to more effectively participate in programs such as demand response where they can reduce their usage during certain times for a financial reward.

Q19. If you had easy access to your usage data on a mobile phone app for example, how do you think you would use it?

Base: All respondents (n=600)

# PREFERENCE FOR ACCESS TO DATA



- Two thirds of respondents were happy to keep the existing data usage breakdown with no extra cost.
- Older respondents were more likely to choose this option (76%).

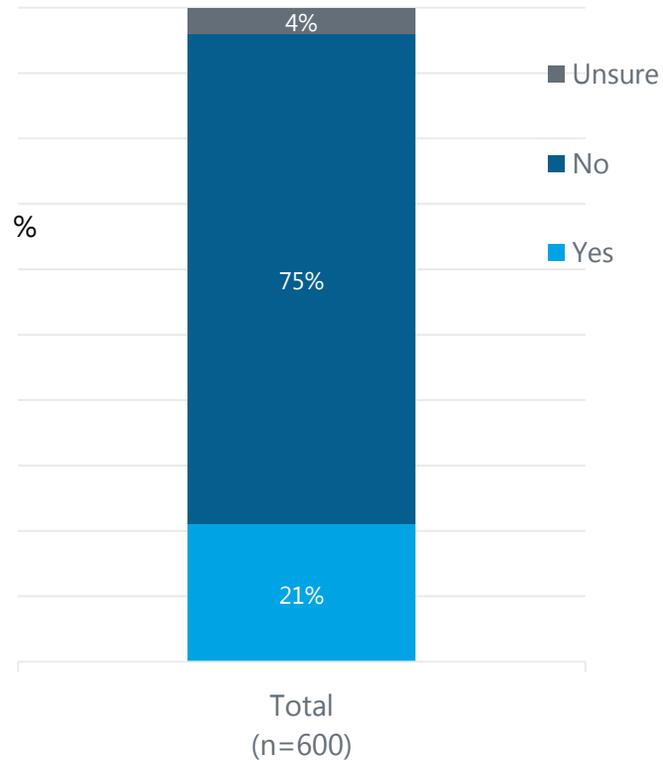
Q20a. In terms of providing the data on your usage, which option would you prefer? *Answers provided after seeing full bill impact.*  
 Base: All respondents (n=600)

**SOLAR  
ENABLEMENT**

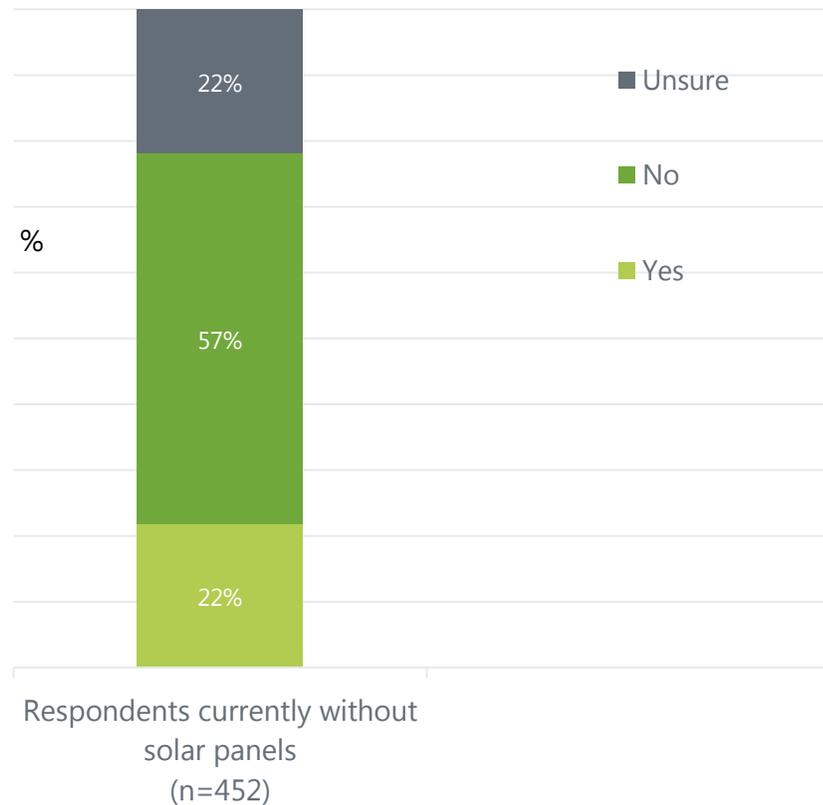


# INCIDENCE OF & INTENTION TO GET SOLAR PANELS

## Incidence of Solar Panels



## Intention to install Solar Panels



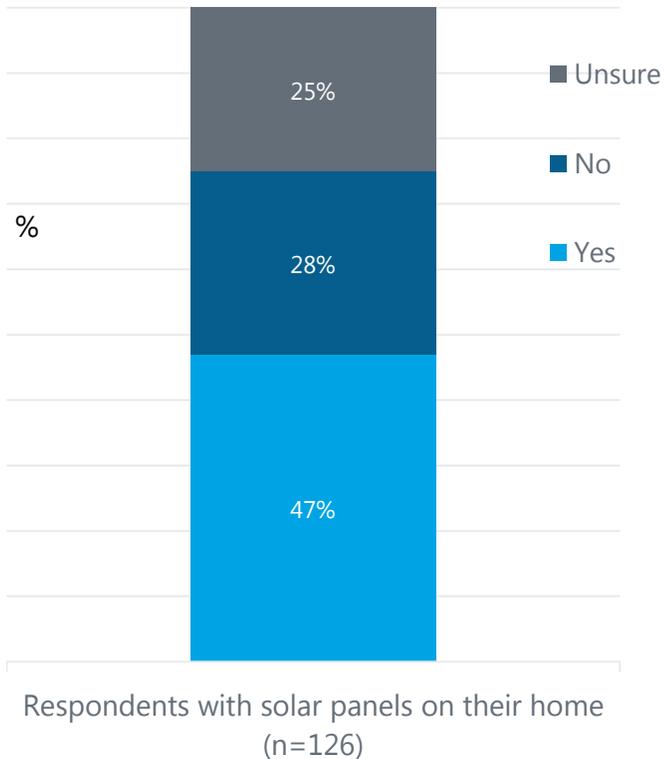
- Low users were significantly more likely to have solar panels installed (29%)
- While those aged 18-34 were significantly less likely to have solar installed (12%), they were more likely to have the intention to install solar in the next 2-5 years (37%).
- LOTE respondents were also more likely to be considering solar (31%), while respondents aged over 55 (14%).

Q21. Do you have solar panels on the home you are living in?  
Base: All respondents (n=600)

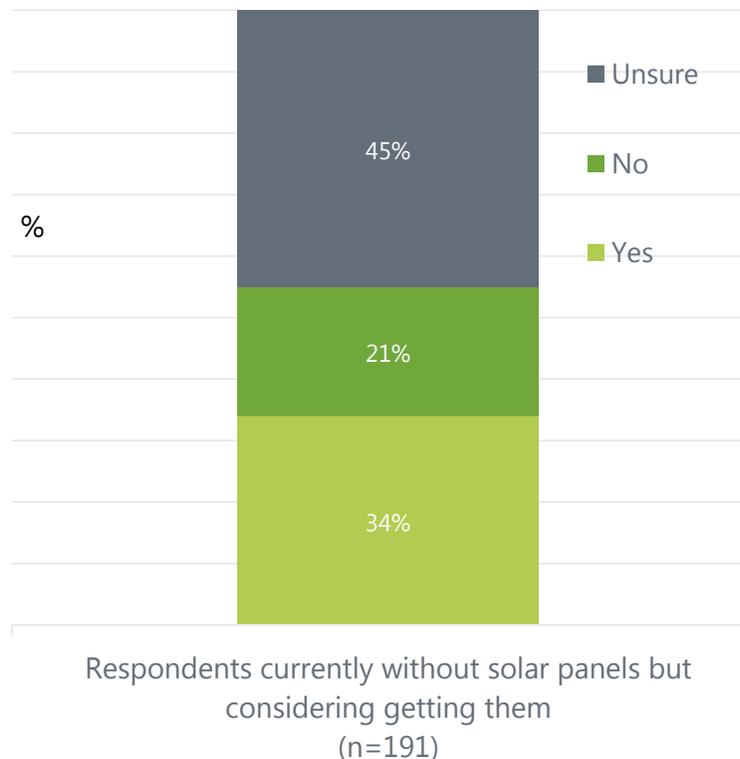
Q22. Are you considering installing solar panels in the next 2-5 years in the home you are living in?  
Base: Respondents currently without solar panels (n=452)

# IMPACT OF EXPORTING SOLAR ELECTRICITY

## Impact amongst those with Solar Panels



## Consideration amongst those without Solar Panels



- Less than half of respondents with solar installed reported that they still would have done so if they could not export.
- Only a third of respondents who do not currently have solar said they would install solar if they could not export (34%).

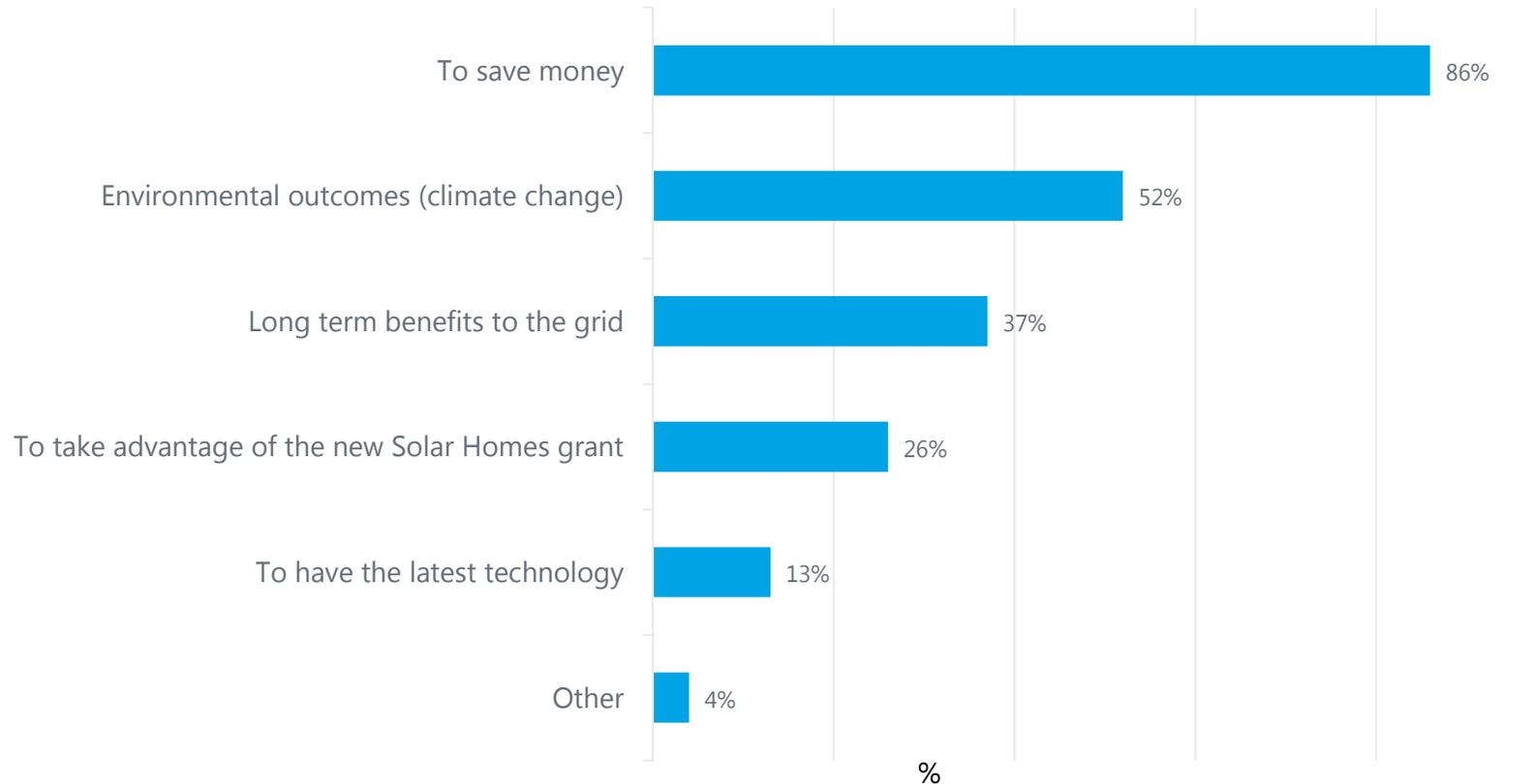
Q23. Would you have decided to install solar panels if you could not export excess solar at all? *If the property already had solar when you moved in then please answer as if you had decided to install it.*

Base: Respondents with solar panels installed on their home (n=126)

Q24. Would you install solar panels if you could **not** sell spare electricity from your solar on to the network??

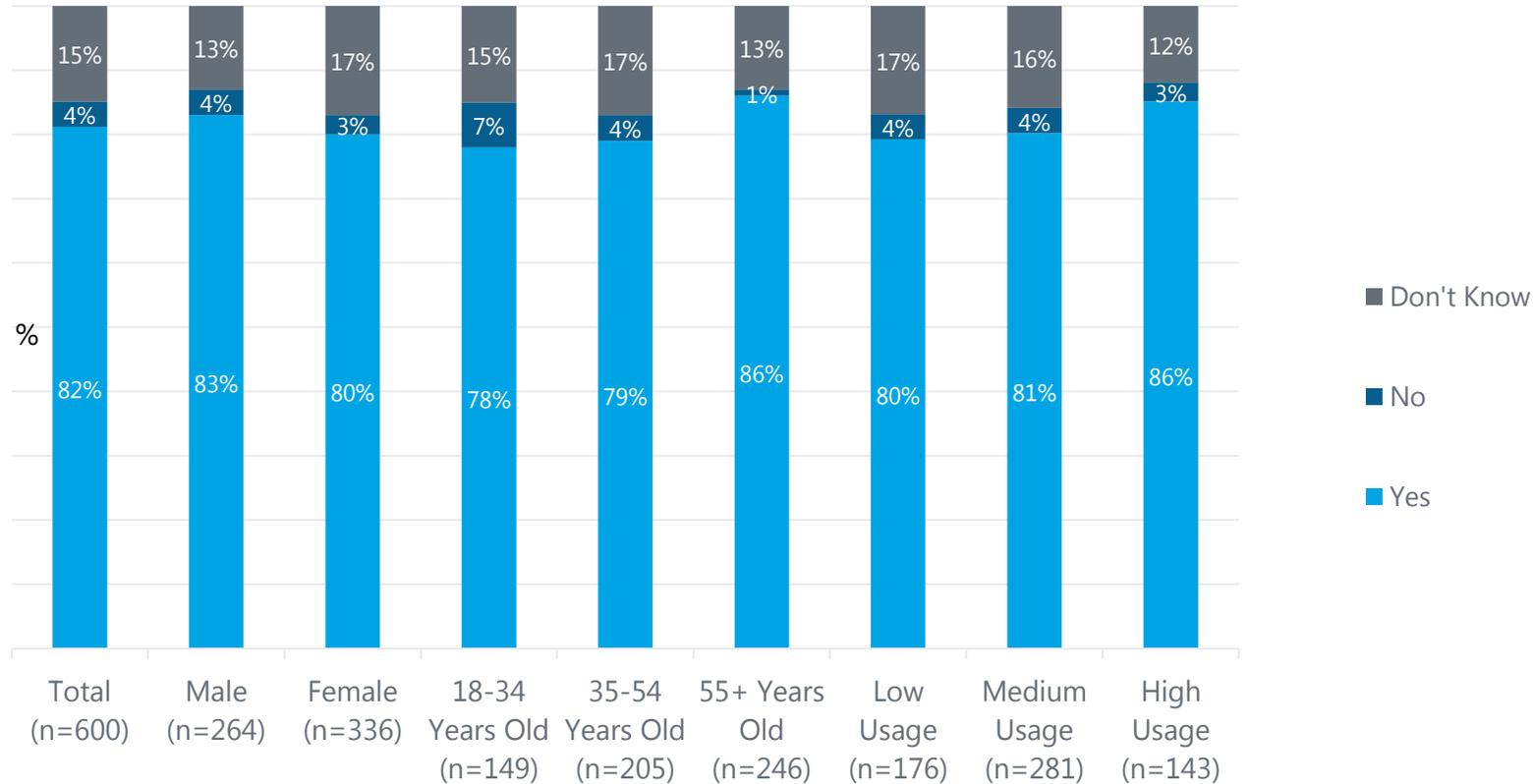
Base: Respondents considering installing solar panels (n=191)

# KEY MOTIVATORS TO INSTALL SOLAR PANELS



- Amongst those with solar or considering installing solar, the majority are motivated both primarily financially and environmentally.

# ABILITY TO EXPORT BACK TO THE GRID



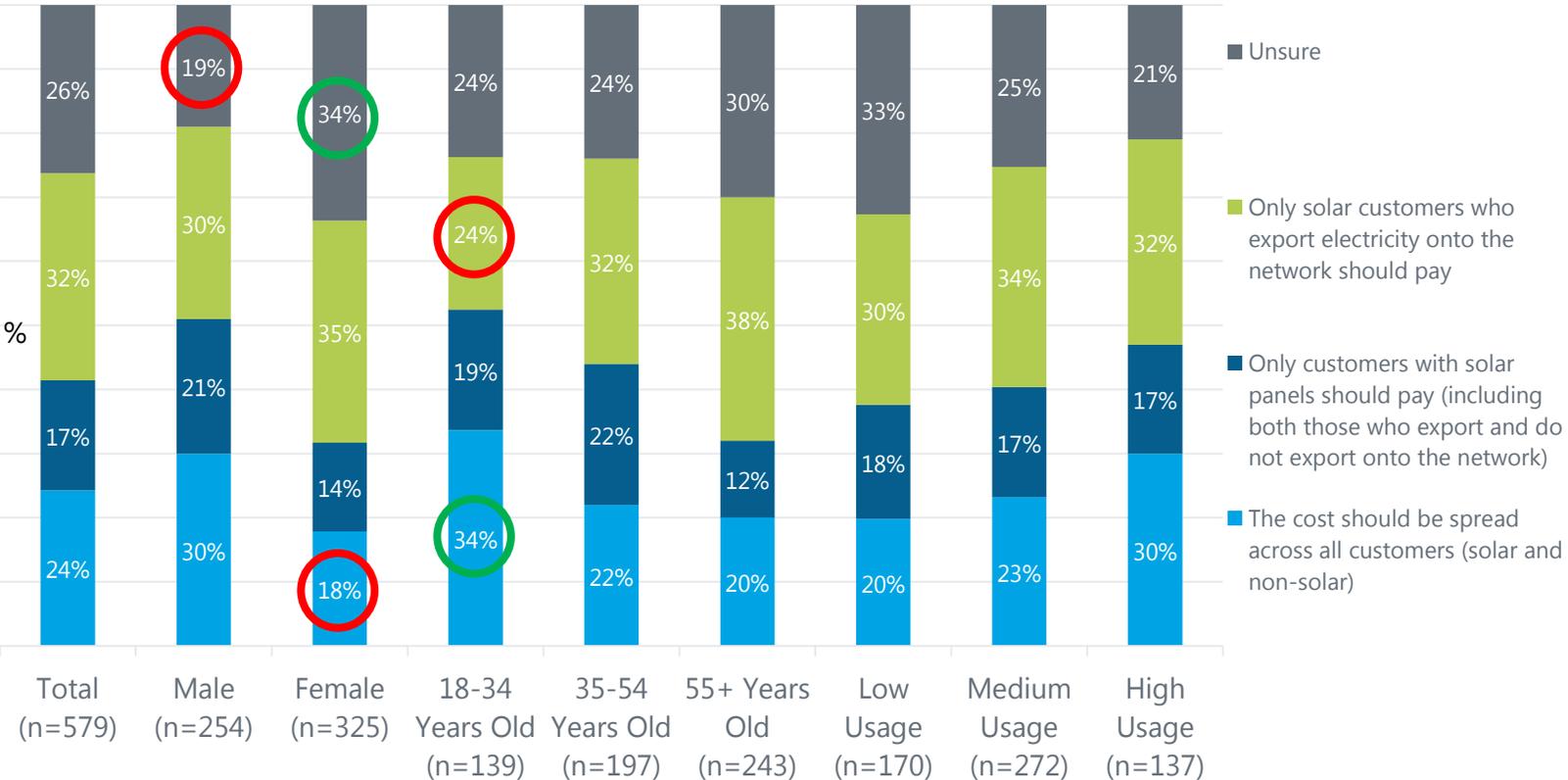
- 4 in 5 respondents believed that solar customers with spare electricity should be able to export electricity back onto the grid.

Currently many customers with solar panels are not able to export their spare electricity onto the network. This is because the network was not originally built to enable a two way flow of electricity and when there is too much electricity exported into the network it causes problems. Investment will need to be made to enable more residential customers with solar panels to export. In the long term the increase of solar and batteries on the network could benefit all customers by bringing down electricity prices for everyone (including those without solar).

Q26. Should solar customers be able to export spare electricity back onto the grid if they want to?

Base: All respondents (n=600)

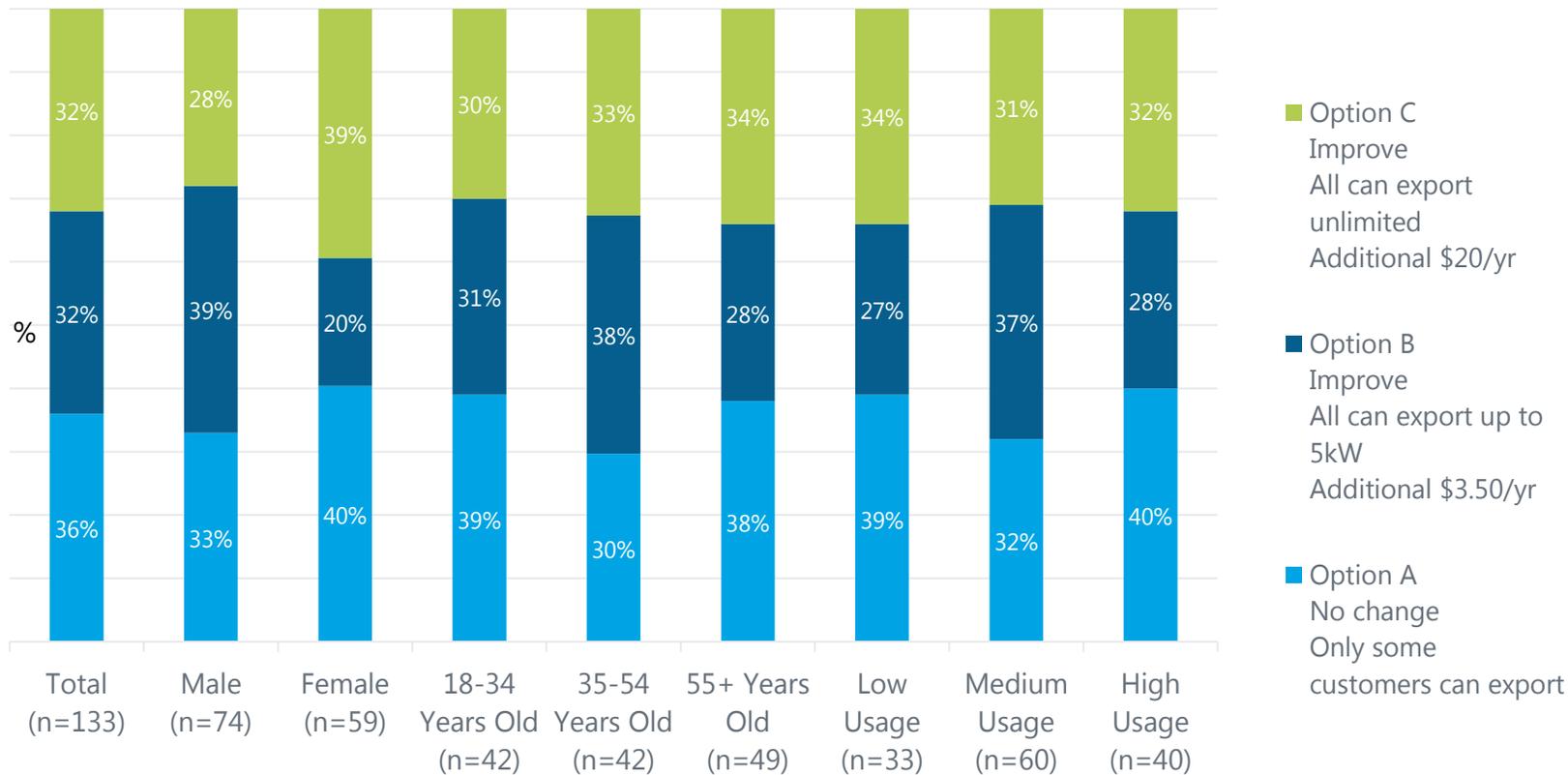
# COST FOR EXPORTING BACK TO THE GRID



- Around half (49%) believed that solar customers should pay the additional cost of ensuring people with solar are able to export with most thinking that only those who export should pay (32%).
- Respondents aged 18-34 were more likely to indicate that the cost should be spread across all customers (34%).
- Those with solar were more likely to say all customers (43%).

Q27. Who should pay for the additional cost of ensuring people with solar panels are able to export their spare electricity onto the network?  
 Base: Respondents who believe solar power should be able to be exported to the grid (n=579)

# PREFERENCE FOR EXPORTING SOLAR POWER



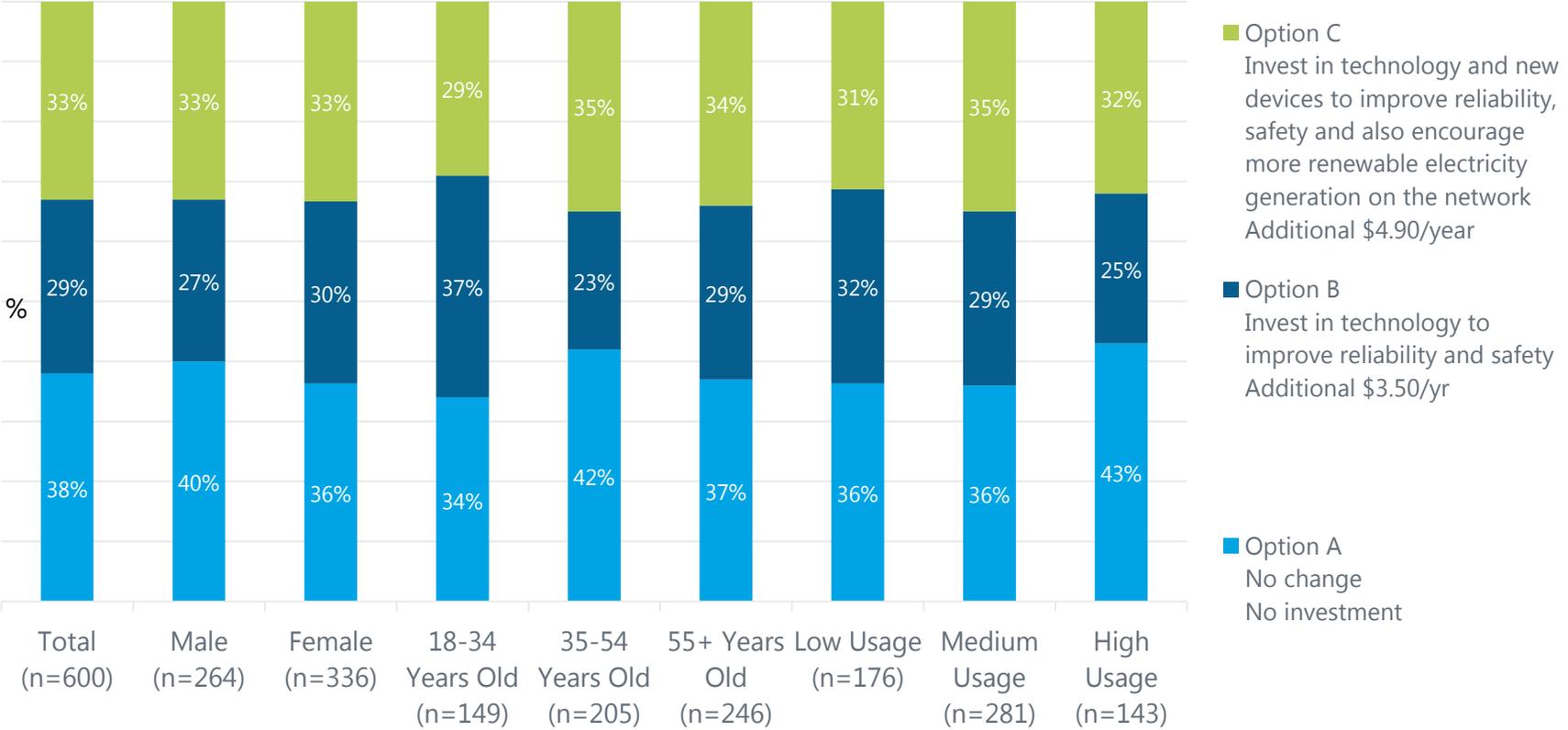
- Two thirds of those who thought the costs should be spread (64%) indicated a preference for improvement, which was evenly split between options B and C.
- There were no significant differences between groups.

Q28a. And which option would you prefer? Answers provided after seeing full bill impact.  
 Base: Respondents who think the cost should be spread across all customers (n=133)

# DIGITAL & RESILIENT NETWORK



# PREFERENCE FOR INVESTING IN TECHNOLOGY



- Almost two thirds of respondents (62%) wanted to see improvements in the investment into technology, at least to improve reliability and safety.
- Vulnerable customers were less likely to choose Option C (24%).

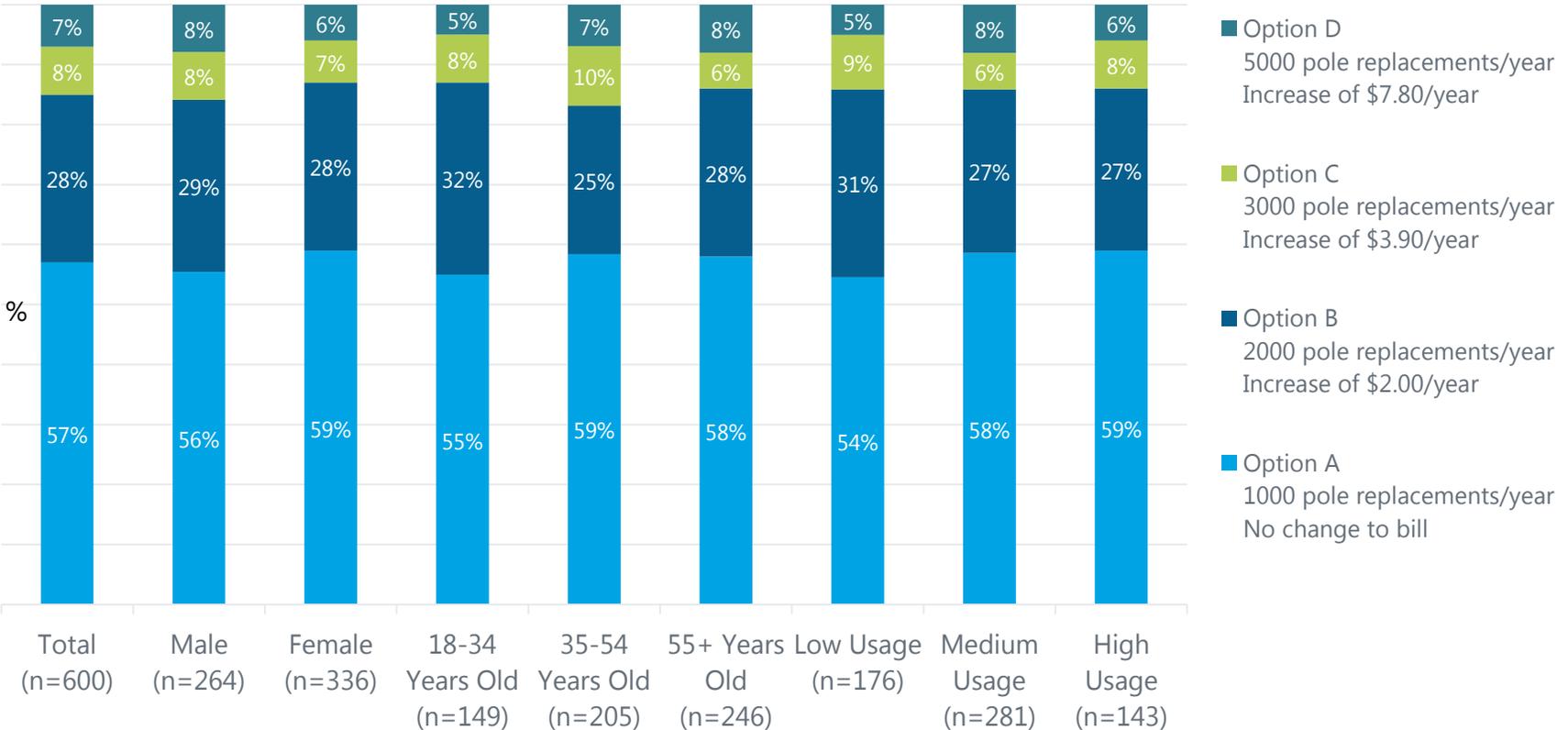
[the distributor] is looking at ways to use new technology to operate more efficiently and effectively. Although there would be a cost initially, in the longer term introducing this technology would reduce the costs of running the network and result in lower customer bills. The technology could be used in a number of programs, such as:

- developing better network pricing and demand management programs for customers,
- detecting electricity theft,
- managing the impact of Electric Vehicles on the network and
- helping to shift energy usage away from peak times to avoid the need for investment.

Q29a. Which option would you prefer? Answers provided after seeing full bill impact.

Base: All respondents (n=600)

# PREFERENCE FOR POLE REPLACEMENTS



- The majority of respondents preferred no change to repair and replacement of poles (57%).
- 43% wanted some improvement, at least to Option B level.
- There were no significant differences across groups.

Q30a. The safety of our power poles is important. Our regular inspection regimes, by fully trained and qualified inspectors, determine when poles need to be repaired or replaced. This is in line with strict regulations and audited by Energy Safe Victoria.

At the moment we replace 1,000 poles per year to strike a balance between cost and safety risk. There are four options for the future replacement of poles and wires provided below: the current option and three others that increase safety but also increase costs. Which option would you prefer?

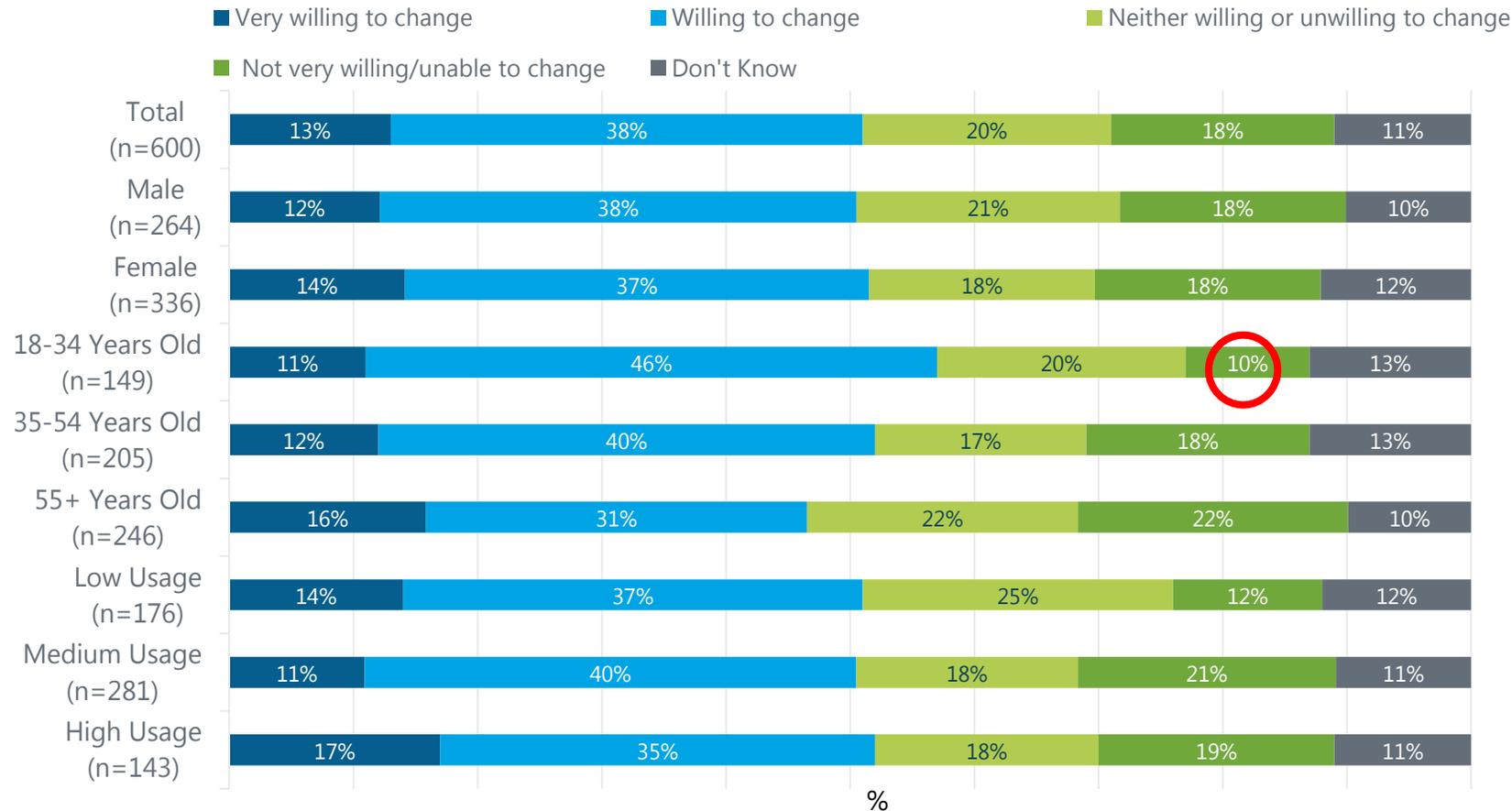
Answers provided after seeing full bill impact.

Base: All respondents (n=600)

# AFFORDABLE NETWORK



# WILLINGNESS TO CHANGE ELECTRICITY USAGE TIMES



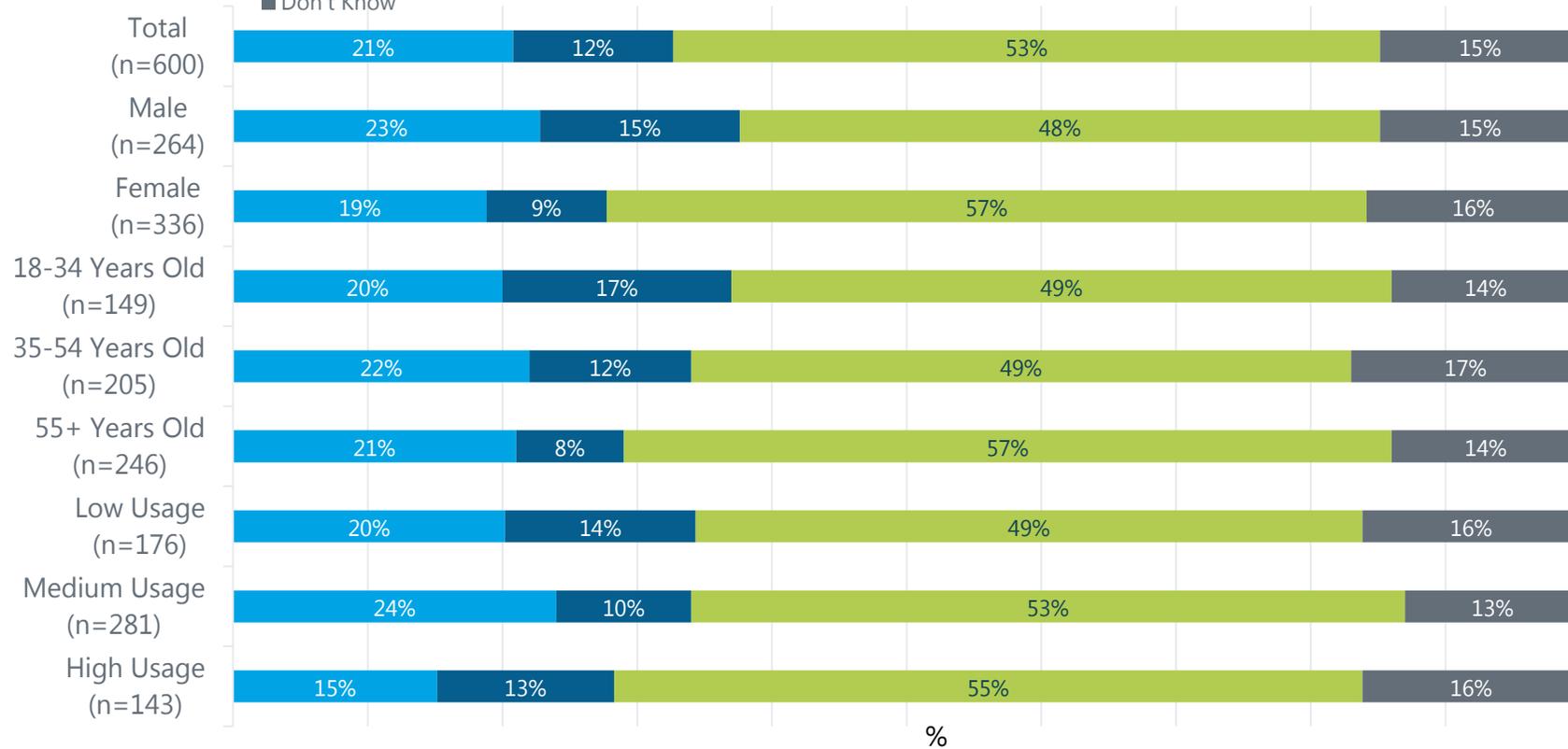
- 51% of respondents indicated that they are willing to change their electricity usage times to save money.
- Respondents aged 18-34 years were marginally less likely to not be very willing or unable to change.

Q35. [The distributor] is considering changing the way you pay for electricity – charging more at certain times of the day and less at others to encourage people to shift their electricity usage to times when electricity is cheaper. This new approach to billing is called 'Time of Use'. How willing and able would you be to change the times you use electricity if you could save money in doing so?

Base: All respondents (n=600)

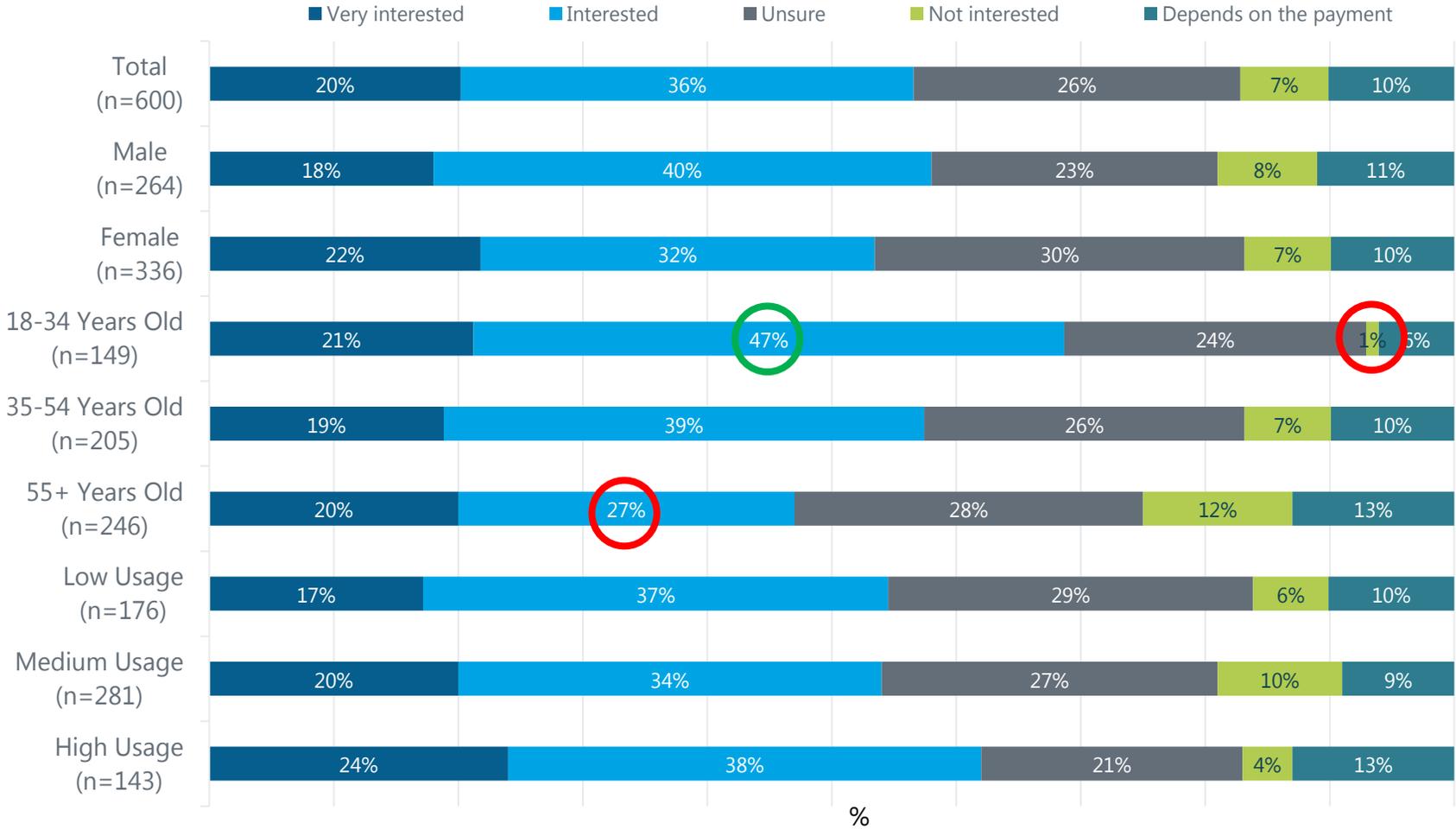
# TRANSITIONING TO 'TIME OF USE' PRICING

- Everyone should be put on it straightaway (unless they 'opt out') so everyone can start to use electricity at times when it is cheaper
- New homes, homes with solar and homes with electric vehicle charging should be put on it straightaway
- People should be able to 'opt in' to the new system (choose whether they want the new tariff and savings proposed or they want to stay with the current flat rate)
- Don't Know



- There is a preference for residents to be able to 'opt in' to the new system, across all respondent groups.

# MONETARY INCENTIVE FOR SHIFTING USAGE



- More than half of respondents were interested in shifting their usage if they were to receive a monetary incentive (56%).
- This was higher amongst vulnerable respondents (69%) and respondents aged 18-34 (68%).

Q35. [Distributor name] can offer payments directly to customers to ask them to reduce some of their electricity usage from 'peak usage times' (normally the late afternoon and evening). Would you be interested in receiving a payment for shifting your electricity usage?  
 Base: All respondents (n=600)

**OVERALL  
PACKAGE FOR  
2021-2026**



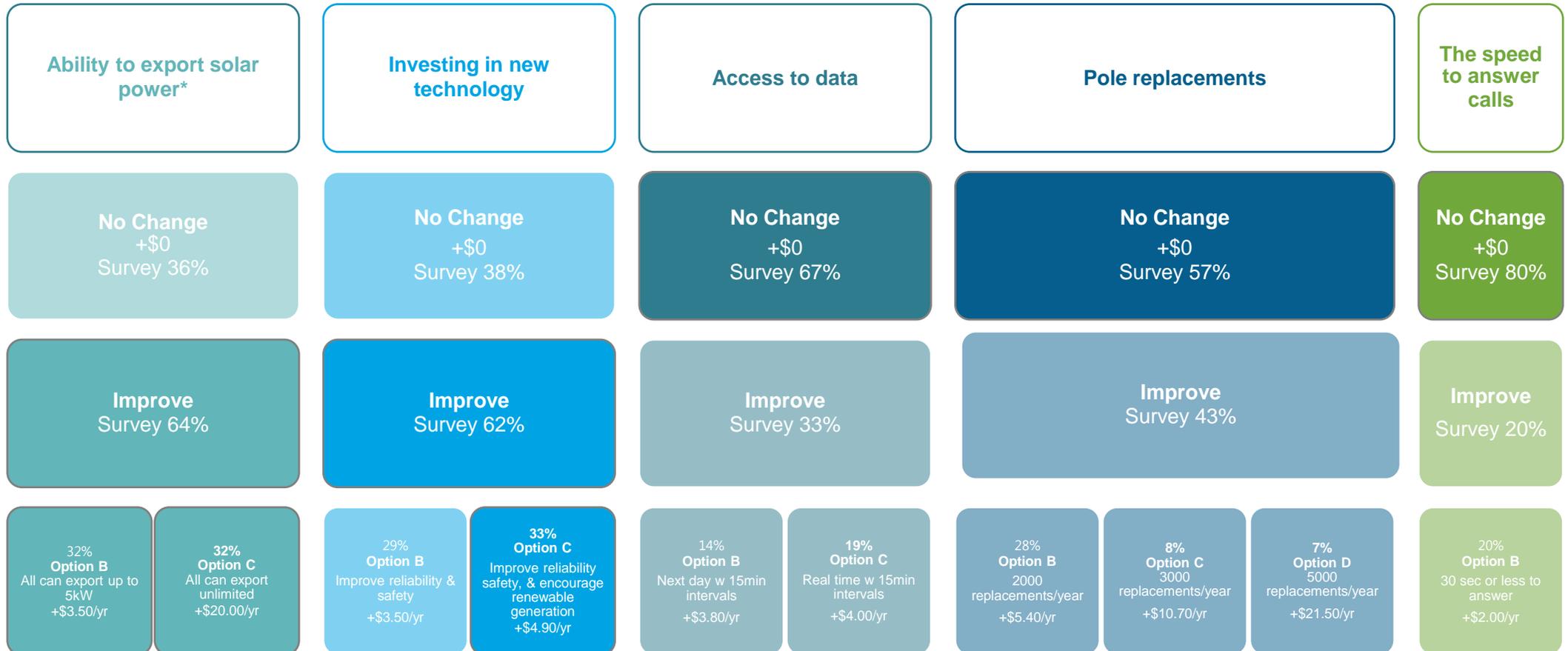
# ALTERATIONS IN WILLINGNESS TO PAY FOR CHANGES

Option	Initial choice for NO CHANGE %	Final choice for NO CHANGE %
Ability to export excess solar power Base: Respondents who think the cost should be spread across all customers (n=133)	37	36
Investing in technology for reliability, safety & encourage renewable energy Base: All respondents (n=600)	40	38
Access to data Base: All respondents (n=600)	70	67
Pole replacements per year Base: All respondents (n=600)	60	57
The speed to answer calls Base: All respondents (n=600)	82	80

- After seeing the final impact on their bill, customers were slightly more willing to pay for improvements across all aspects mentioned.

Now we want to confirm the overall package of options you'd prefer in [the distributor's] proposals for 2021-26. In the next question, we will show you the overall impact on your bill from your chosen options (answers given to previous questions). You will be able to change your choices if you wish.  
Base: All respondents (n=600)

# SUMMARY OF PREFERENCES



\* Note that only a sub-set of the sample were asked this question (those who believed that all customers should pay). However, the majority believed that solar customers should pay rather than all customers.

# TOTAL AMOUNTS WILLING TO PAY FOR CHANGES

Option	Total (n=600) %	Male (n=264) %	Female (n=336) %	18-34 Years Old (n=149) %	35-54 Years Old (n=205) %	55+ Years Old (n=246) %	Low Usage (n=176) %	Medium Usage (n=281) %	High Usage (n=143) %
\$0 → not willing to pay for any changes	29	29	29	22	33	30	26	28	35
\$0.01 – \$5.00	20	19	21	17	19	22	23	19	19
\$5.01 – \$10.00	27	23	31	37	21	27	30	28	22
\$10.01 – \$15.00	15	18	11	15	17	12	13	16	14
\$15.01 – \$20.00	3	4	2	2	3	3	2	3	4
\$20.01 – \$25.00	1	1	1	1	1	1	1	1	2
\$25.01 – \$30.00	2	1	2	3	1	2	2	2	2
\$30.01 or more	3	4	2	3	4	2	3	3	3
<b>Average</b>	<b>\$6.86</b>	<b>\$7.3</b>	<b>\$6.42</b>	<b>\$7.48</b>	<b>\$6.82</b>	<b>\$6.52</b>	<b>\$6.80</b>	<b>\$7.09</b>	<b>\$6.49</b>

- Nearly 1 in 3 respondents were not willing to pay for any changes at all (29%).
- Two thirds of respondents were happy to pay up to \$15.00 extra in their annual bills for changes.
- Males and respondents aged 18-34, and medium usage respondents were slightly more willing to pay more on average.

In looking at the options that [the distributor] is considering for 2021 to 2026, you should assume that your annual bill would go down by **(CitiPower \$25/Powercor \$24/United Energy \$44)** if there are no changes made at all. This is due to expected cost savings in the general plan before consideration of all these proposals in this survey.

Now we want to confirm the overall package of options you'd prefer in [the distributor's] proposals for 2021-26. In the next question, we will show you the overall impact on your bill from your chosen options (answers given to previous questions). You will be able to change your choices if you wish.

Base: All respondents (n=600)

# DEMOGRAPHICS



# DEMOGRAPHICS

	All respondents %
<b>Age</b>	
18-24	8
25-34	17
35-44	21
45-54	13
55-64	19
65 or over	22
<b>Gender</b>	
Male	50
Female	50

	All respondents %
<b>Speaks a language other than English (LOTE)</b>	
Yes	29
No, just English	70
Prefer not to say	1
<b>Aboriginal or Torres Strait Islander</b>	
Yes	3
No	96
Prefer not to say	2
<b>Household income</b>	
Under \$20,000	8
\$20,000-\$59,999	28
\$60,000-\$99,999	28
\$100,000-\$149,999	13
\$150,000 plus	9
Prefer not to answer	15

Q2. Which of the following age groups best describes you...

Q6. Record gender.

Q7. Do you speak a language other than English at home/with family?

Q8. Are you of Aboriginal or Torres Strait Islander origin?

Q39. Which of the following categories best describes the income before tax of the highest earner in your household?

Base: All respondents (n=600)

# DEMOGRAPHICS

	All respondents %
<b>Residency</b>	
Tenant	32
Home owner	68
Other	0
<b>Housing</b>	
Stand-alone house or dwelling	70
Townhouse or semi	12
Apartment or unit complex	18
Other	0
<b>Usage</b>	
Low (under 1000)	29
Medium (1000 - 1500)	46
High (1500+)	24

	All respondents %
<b>Household makeup</b>	
Single household	22
Couple living together with no children	31
Shared household	12
Family household with children still at home	36
Other	0
<b>Vulnerability</b>	
Had to borrow money to pay a bill	6
Had to ask for an extension or paid late	11
Been on a special payment plan	9
Been disconnected due to inability to pay	1
None	79

Q37. Thinking about the home you currently live in, are you a...  
 Q38. Do you live in a...  
 Q40. Which of the following best describes your household make up?  
 Q36. In the last 12 months, have you had any difficulty paying your electricity bills such as...  
 Base: All respondents (n=600)

