Appendix I: EN24 ‘have your say’ survey results

Regulatory proposal for the ACT electricity distribution network 2024–29

EN24 ‘Have your say’ survey results

November 2022

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Background

- In June 2022, we launched an online survey on www.engagewithenergy.com.au
- The survey was promoted through Evoenergy's social media and paid advertising over a four-week period to encourage engagement, achieving 718 responses.
- The survey features 40 questions on service delivery, climate change resilience, tariffs, and energy use in the future.

RESULTS SNAPSHOT

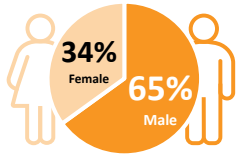
	SERVICE DELIVERY	CLIMATE CHANGE	TARIFFS	ENERGY USE
KEY RESULTS	**74%** Canberrans are happy with the current duration and frequency of unplanned outages **78%** Canberrans believe Evoenergy should provide real time outage communication at no extra cost	**62%** Canberrans would be prepared to pay up to $20 more each year to improve network resilience Canberrans that are all electric in the home are more likely to pay more to improve the resilience of the electricity network	**1 in 2** Canberrans want to receive price signals to optimise their use, and 1 in 2 believe it's fair to use tariffs to encourage export at peak times **65%** Canberrans believe everyone should pay for network upgrades to enable solar export	**1 in 3** Canberrans that have gas intend to switch to electricity only, to either save money or reduce their emissions **80%** Canberrans intending to buy an EV will make their purchase in the next five years (26% of population)
CUST' VOICE	**Push communication** Canberrans expect a level of service that's fair, with information about the cause of outages. Bring the information to me, I want to know	**Plan & prepare** Canberrans expect Evoenergy to proactively understand how climate change will impact the network and prepare for it	**Everyone pays** Canberrans believe t's fair to use tariffs to encourage export at peak times and there's some appetite for behaviour change, but everyone should pay for upgrades to enable two-way power flows	**Investment** Canberrans are investing in solar, batteries and EVs and there's a clear intention to continue to invest. Convenience, cost, and emissions are key themes

Source: Evoenergy EN24 "Have your say' survey 2022

Profiling

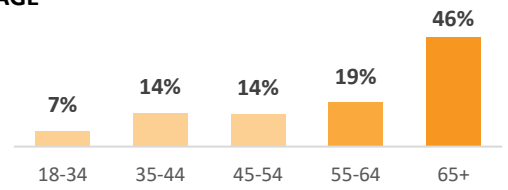
DEMOGRAPHICS

GENDER

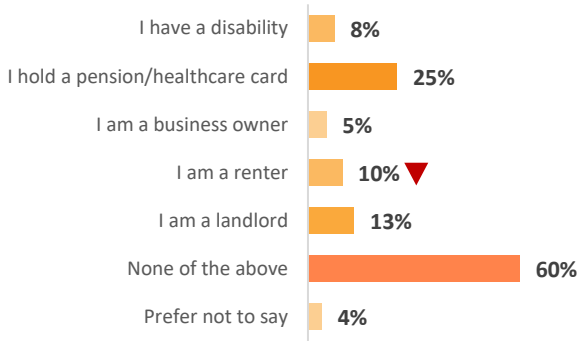


0.7% Other

AGE



PROFILE



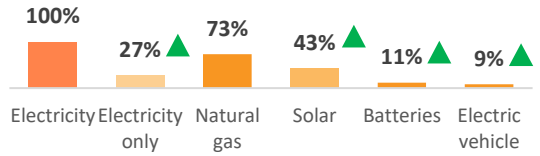
0.4% Aboriginal or Torres Strait Islander

LANGUAGE AT HOME

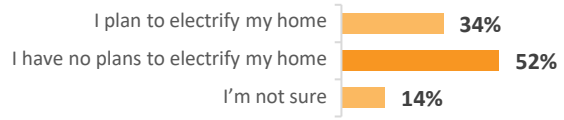
ENERGY RELATIONSHIP

ENERGY USED AT HOME

Significantly more solar (43% vs. 31% 2021) & significantly more batteries (11% vs 4% in 2021)

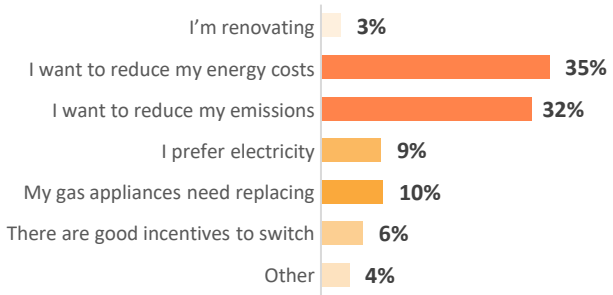


PLANS TO SWITCH



Respondents surveyed before ACTG electrification announcement

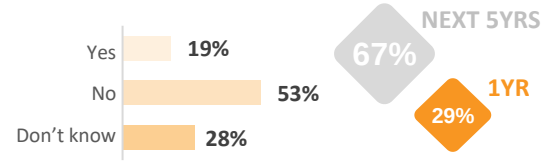
SWITCHING DRIVERS



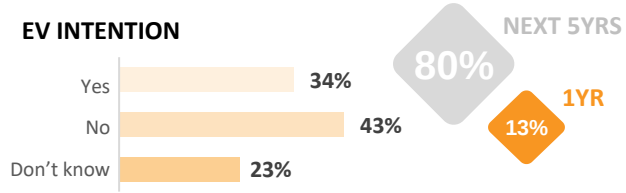
▼▲ Significantly higher/lower than 2021 Annual Customer Survey sample

DISTRIBUTED ENERGY RESOURCES

SOLAR & BATTERY INTENTION

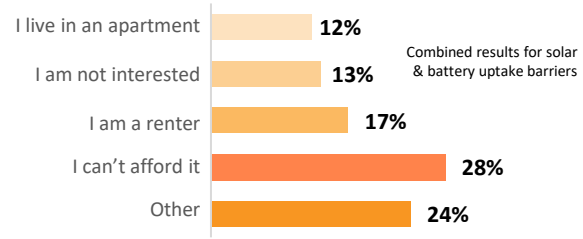


EV INTENTION



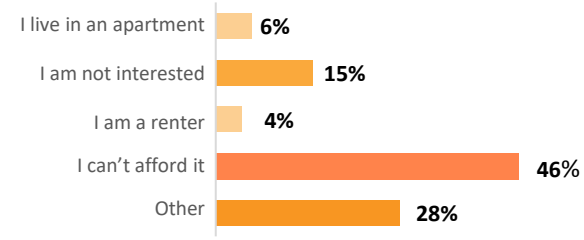
Respondents surveyed before ACTG EV announcement

SOLAR & BATTERY UPTAKE BARRIERS



Combined results for solar & battery uptake barriers

EV UPTAKE BARRIERS



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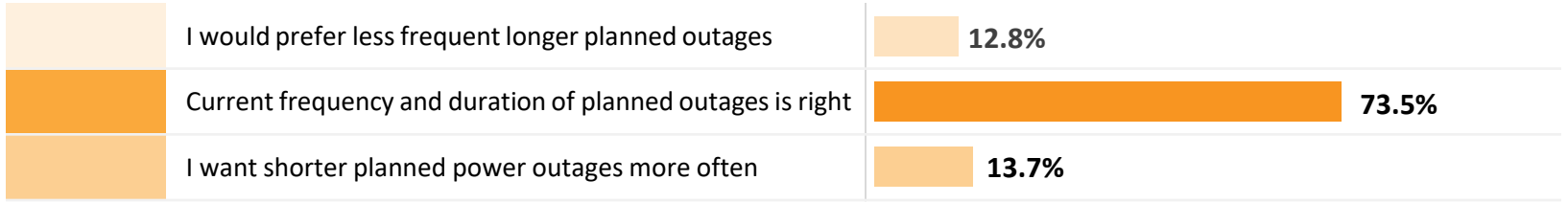
Service delivery

Survey questions:

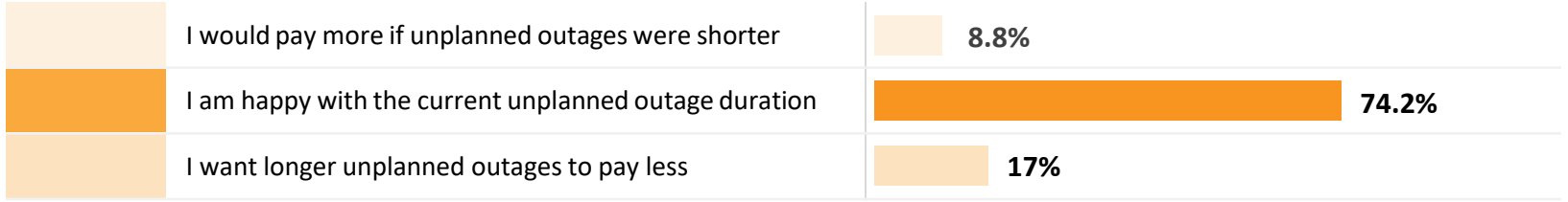
- Would you prefer to experience planned power outages that occur less frequently but last longer, or are more frequent but shorter?
- Would you pay more for your electricity supply if it meant unplanned power outages were restored faster?
- How important is receiving real time communication of unplanned and planned outage updates to you, via an SMS or on the website/outage map?

Reliability

Most customers experience less than one planned power outage per year. Would you prefer to experience planned power outages that occur less frequently but last longer, or are more frequent but shorter?



On average, Canberrans experience 0.6 unplanned power outages that last for 35 minutes per year. Would you pay more for your electricity supply if it meant unplanned power outages were restored faster?



74%

Canberrans are happy with the current duration and frequency of unplanned outages

Significant differences:

- 35-44 year olds – I want longer outages to pay less (26% vs 12% 65+)
- Small business owners – I want longer outages to pay less (23% vs 16% total)

BASE: Total sample (n=718)

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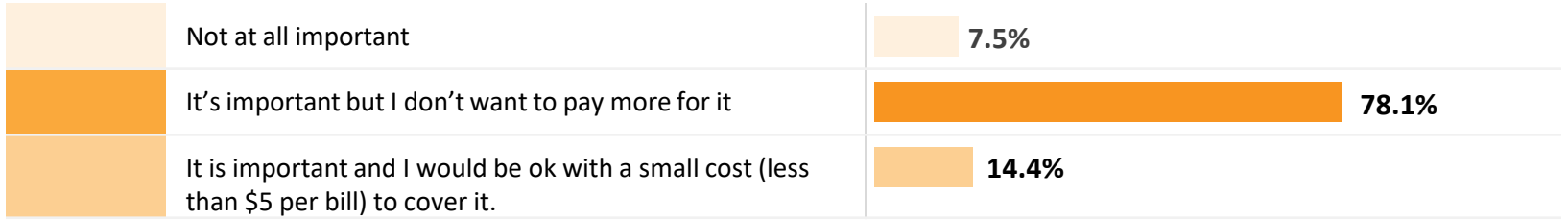
Communication

How important is receiving real time communication of unplanned and planned outage updates to you for example, via an SMS or on the website or outage map?



78%

Canberrans believe Evoenergy should provide real time communication of planned and unplanned outages at no extra cost

Significant differences:

- Small business owners – important, ok to pay small cost (17% vs 13% total)

Are there other areas Evoenergy could improve its customer service levels?

“I've noticed that some parts of Canberra seem to experience more outages than others. I think it is important that all Canberrans have the same level of service and energy security, so while I have not experienced many planned or unplanned outages in my area, I'd want Evoenergy to ensure that this is the same experience for everyone in the ACT, with minimal disruptions.”

“Sometimes the staff that answer the faults and emergency line can be a bit rude and abrupt, they could explain situations a bit better.”

“I'd like to see more details about the unplanned outages when they occur, poles down, substation fire etc.”

BASE: Total sample (n=718)

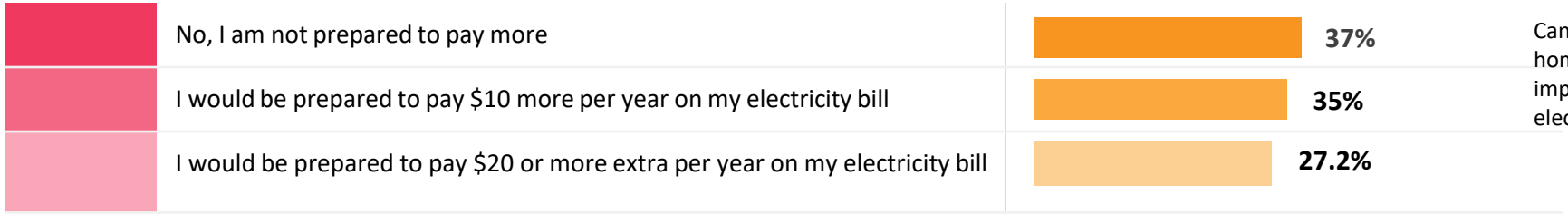
Climate change

Survey questions:

- Would you be prepared to pay more for your electricity supply to improve the resilience of the electricity network?
- What role should Evoenergy play to support the Canberra community to respond to climate change and extreme weather events, and what should we do to prepare?

Willingness to pay

Would you be prepared to pay more for your electricity supply to improve the resilience of the electricity network?



BASE: Total sample (n=718)

62%

Canberrans would be prepared to pay a small amount of money each year to improve the resilience of the electricity network

Canberrans that are all electric in the home are more likely to pay more to improve the resilience of the electricity network

What role should Evoenergy play to support the Canberra community to respond to climate change and extreme weather events, and what should we do to prepare?

“Where's your Disaster Recovery Plan?”

“I think it is important for Evoenergy to ensure our electricity supply is resilient to climate change impacts, but care needs to be taken not to over-invest. A lot of this will come down to exactly what climate change impacts are predicted for the ACT, how likely they are, and what it would cost to ensure network resilience.”

“Collaborate with other agencies and provide advice to consumers to prepare.”

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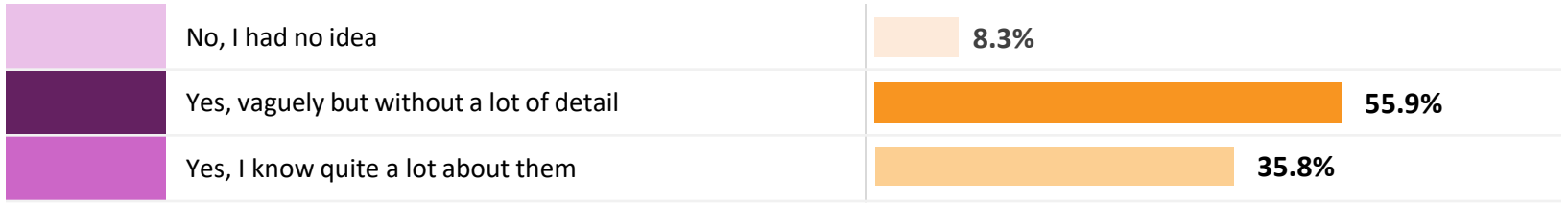
Tariffs

Survey questions:

- Before today, did you know what an electricity tariff was?
- Do you know what type of retail electricity tariff you are on currently?
- Would you change how you use your electricity if it saved you money?
- Do you think that it’s fair to use tariffs to encourage households to use their own generated electricity during the day, or store it for export during evening or morning peaks?
- As solar becomes more popular, who should pay for the infrastructure upgrades to allow customers to export their solar?

Awareness

Before today, did you know what an electricity tariff was?



Do you know what type of retail electricity tariff you are on currently?

1 in 2

Canberrans have a basic awareness of tariffs, however

1 in 3

Canberrans don't know what tariff they're on

Significant differences:

- Small business – I know quite a lot (54% vs 33% total)
- Solar owners – I know quite a lot (39% vs 26% total)

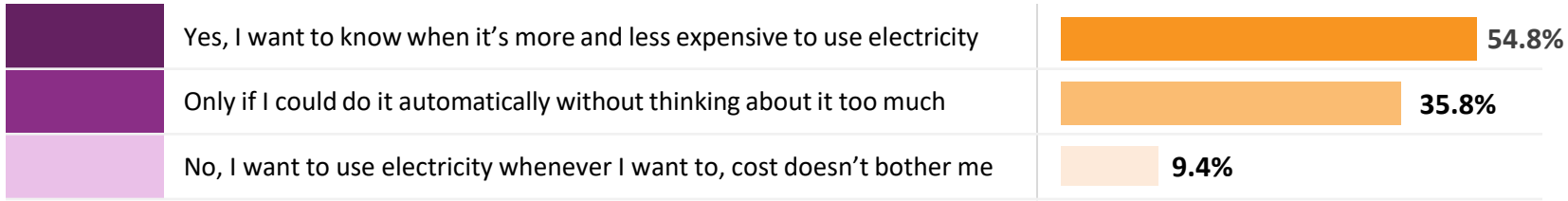
BASE: Total sample (n=718)

Behaviour change

1 in 2

Canberrans want to receive price signals so they can optimise their use

Would you change how you use your electricity if it saved you money?

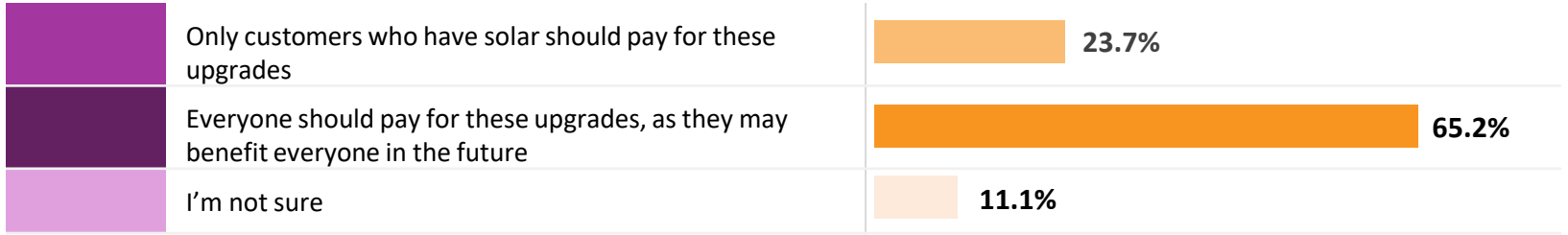


BASE: Total sample (n=718)

Fairness & equity

Do you think it's fair to use tariffs to encourage households to use their own generated electricity during the day, or store it for export during evening or morning peaks?

As solar becomes more popular, who should pay for the infrastructure upgrades to allow customers to export their solar?



1 in 2

Canberrans believe it's fair to use tariffs to encourage export at peak

65%

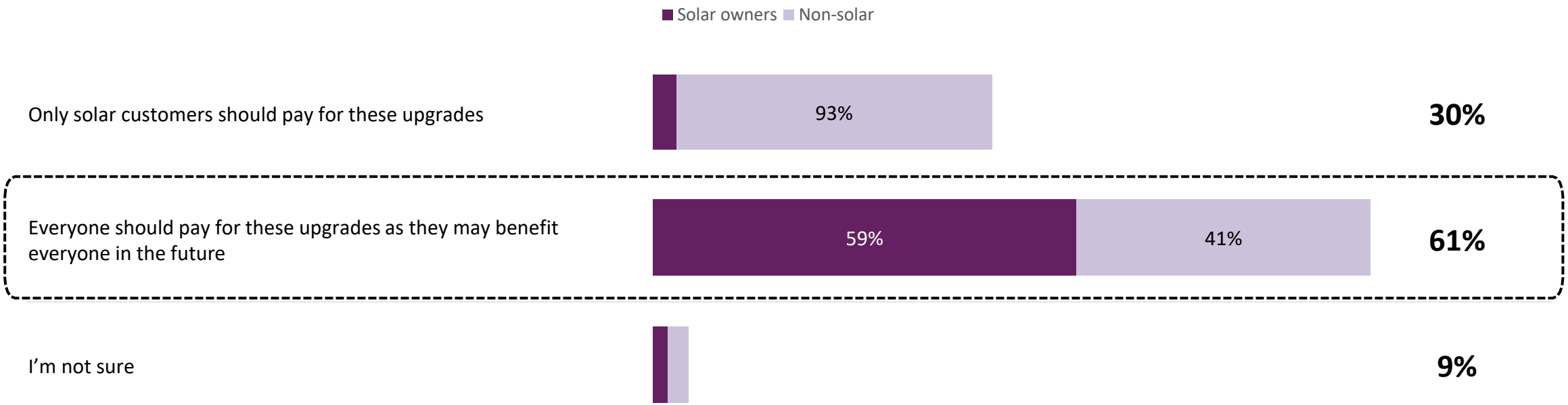
Canberrans believe everyone should pay for network upgrades to enable solar export

Significant differences:

- Renters – everyone should pay (52% vs 65% total)
- Solar owners – everyone should pay (84% vs 65% total)

BASE: Total sample (n=718)

Fairness & equity



Q21. As solar becomes more popular, who should pay for the infrastructure upgrades to allow customers to export their solar?
BASE: Total sample (n=348)

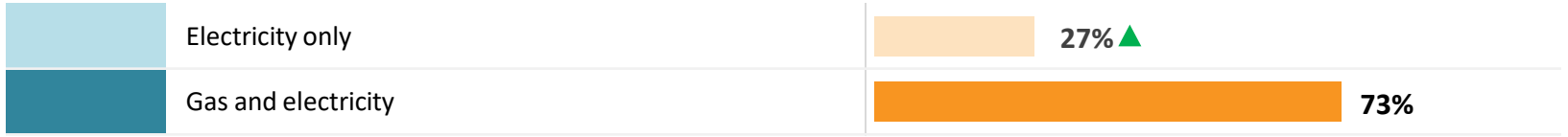
Energy use

Survey questions:

- What energy do you currently use at your home or business?
- Do you have plans to switch to electricity only? Why?
- How long into the future are you considering switching to electricity only?
- What do you currently use gas for?
- Do you have solar, a battery or EV? If not, do you plan to get one? When?
- How do you use energy?

Electrification

What energy do you currently use at your home or business?



BASE: Total sample (n=718)

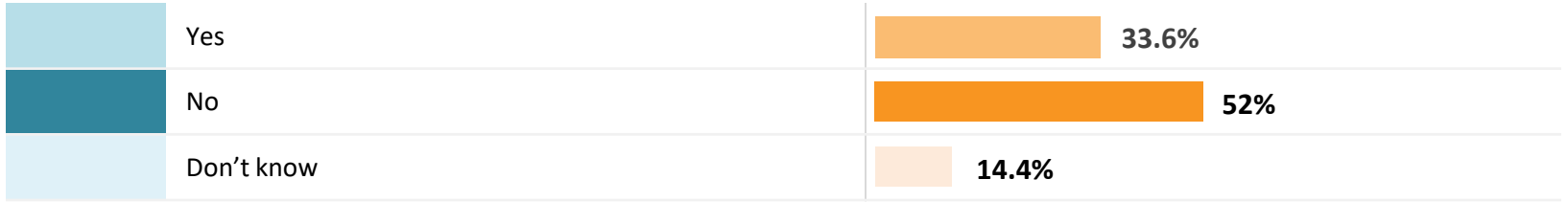
1 in 4

Canberrans are now electricity only in their home or business, and this number is increasing over time

1 in 3

Canberrans intend to switch to electricity only, to either save money or reduce their emissions

Do you have plans to switch to electricity only?



BASE: Total sample (n=524)

▼▲ Significantly higher/lower than 2021 Annual Customer Survey sample

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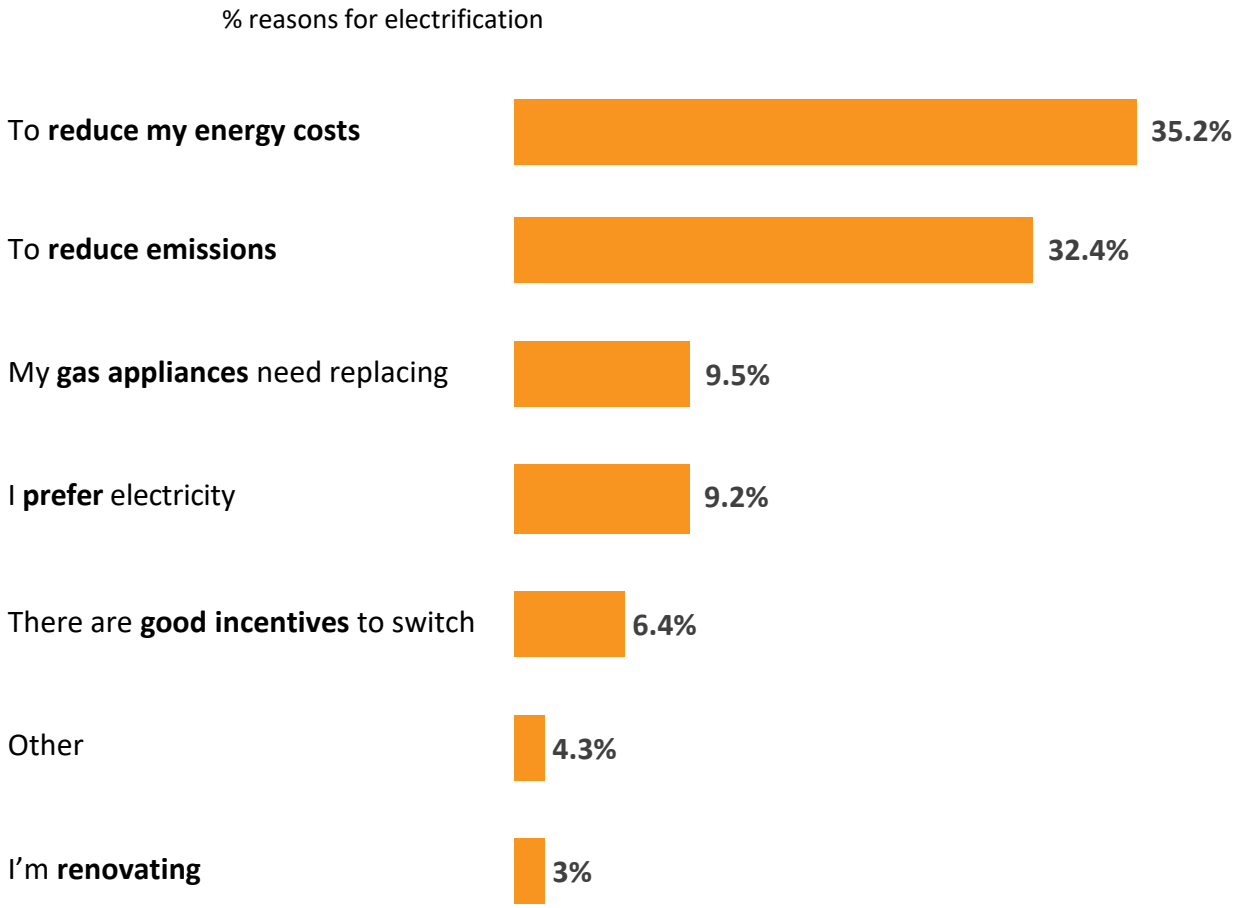
When & why

62%
Five years



Relative importance, excludes cases with missing data (electric only in the home) (n=196)
Q26. How long into the future are you considering switching to electricity only? (n=106) Q27. Why are you planning to switch to electricity only? (Select all that apply)
BASE: Gas & electricity customers, n=358

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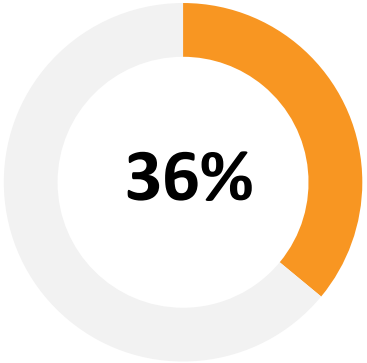
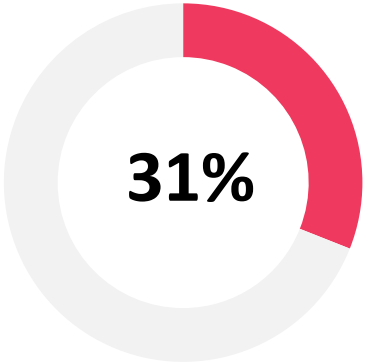
Gas use



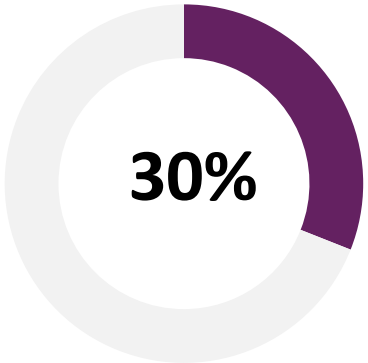
Hot water heating

1 in 3 customers use gas for hot water heating, traditionally consumers view instant gas heater as superior



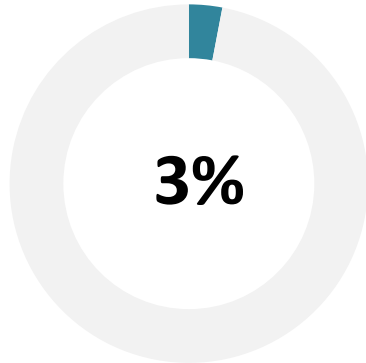
Gas heating
(space heating)

1 in 3 customers use gas for space heating, which in Canberra is on for up to ~8 months each year



Gas cooking

1 in 3 customers use gas for cooking, traditionally consumers view gas cooking as superior



Other

A small number of customers use gas for cooling, outdoor BBQs and outdoor heating

Q24. What do you currently use gas for? (Select all that apply)
BASE: Total (n=1,040)

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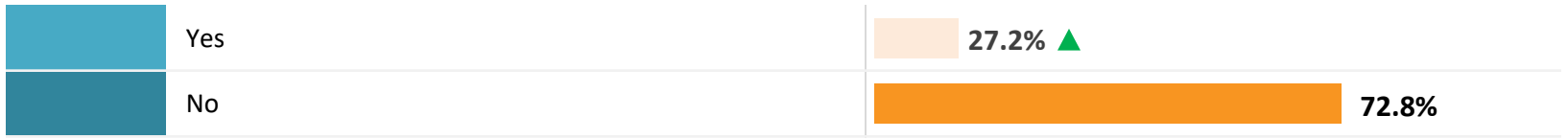
Solar & battery uptake

Do you have a solar or battery installed at your home or business?



BASE: Total sample (n=718)

1 in 3

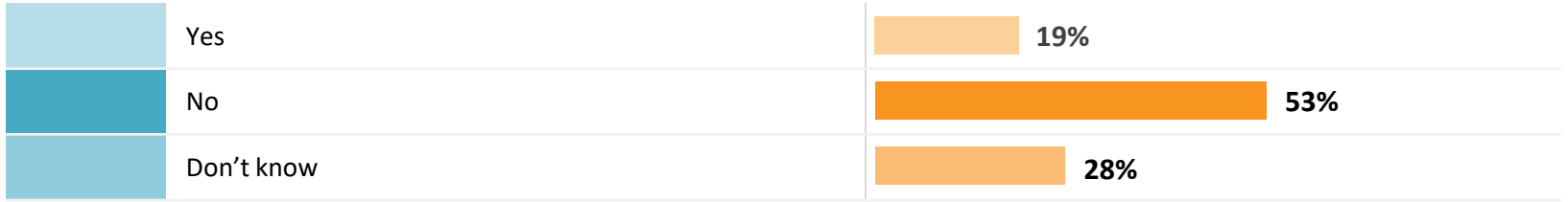
Canberrans have solar or a battery installed at their home or business

1 in 5

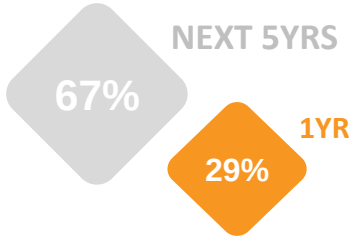
Canberrans that don't have solar or a battery are planning to get one, and the majority of those within five years

▼▲ Significantly higher/lower than 2021 Annual Customer Survey sample

Are you planning to get solar or a battery?



BASE: Total sample (n=524)



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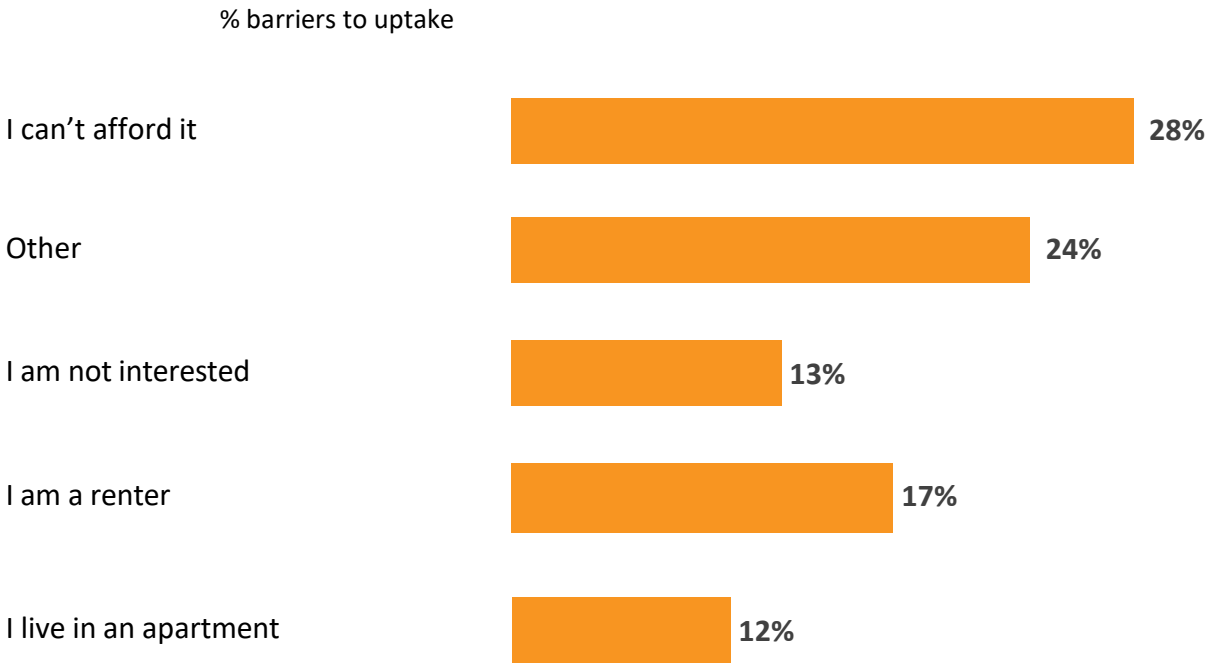
Solar & battery uptake barriers

67%
Five years



Q30 - Q35. Are you planning to get solar or a battery? When? If not, why? (Select all that apply)
BASE: Gas & electricity customers, n=152

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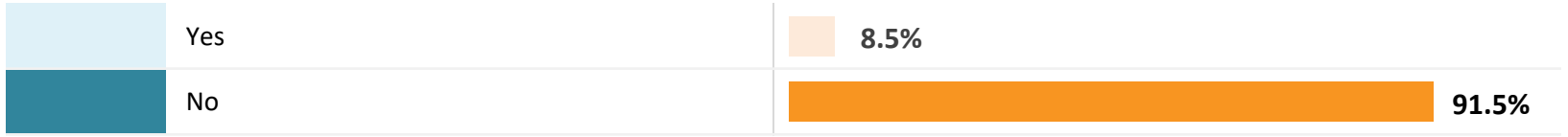
EV uptake

Do you have an electric vehicle?

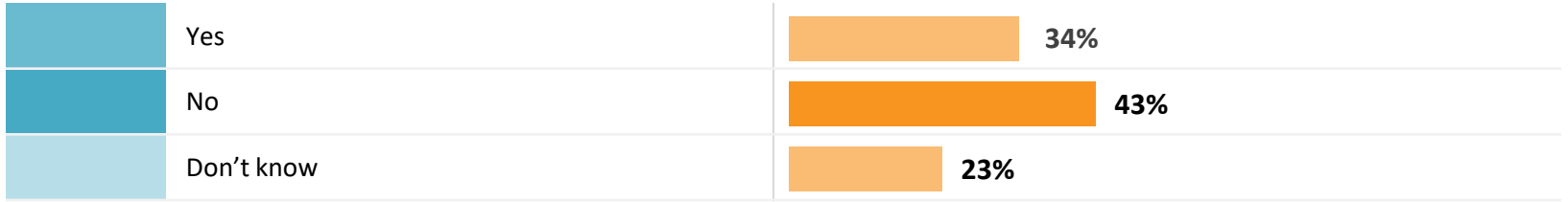


BASE: Total sample (n=718)

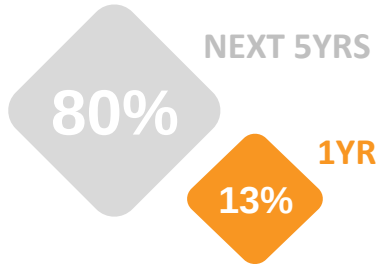
8.5%
Canberrans have an EV

1 in 3
Canberrans are planning to get an EV

Are you planning to get an electric vehicle?



BASE: Total sample (n=524)



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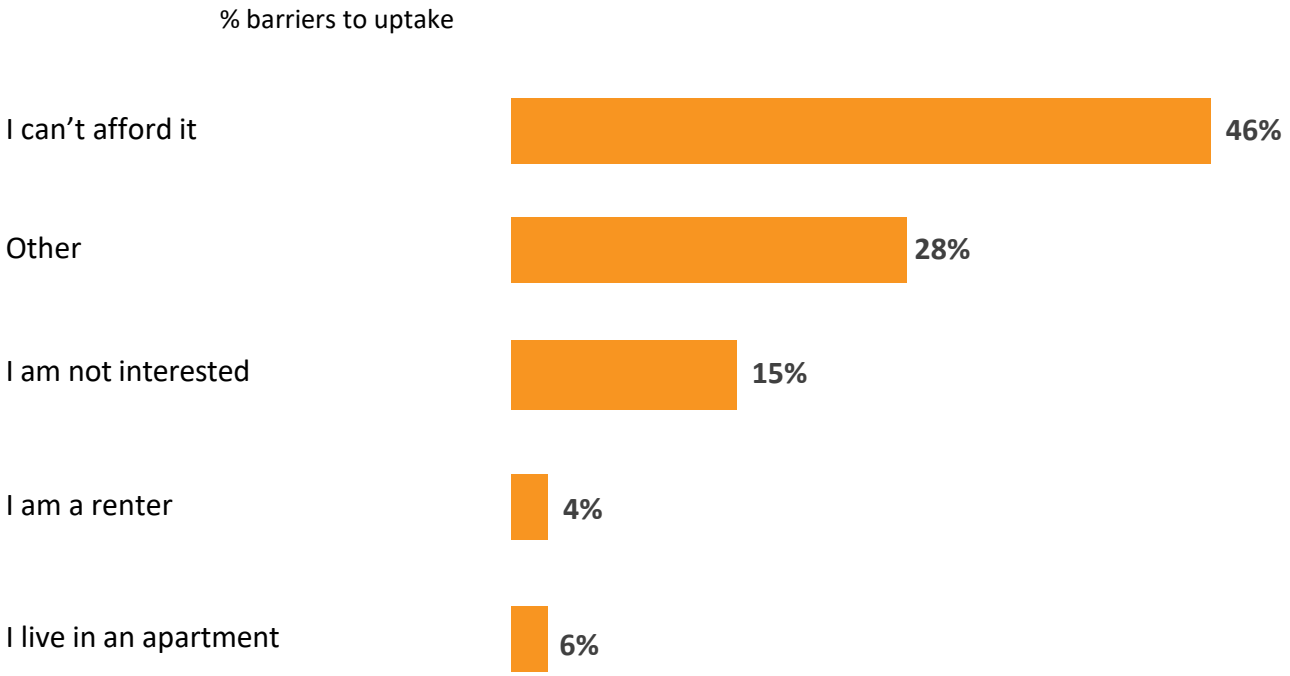
EV uptake barriers

80%
Five years



Q36 - Q39. Are you planning to get and EV? (n=654) When? (n=142) If not, why? (Select all that apply)
BASE: Gas & electricity customers, n=476

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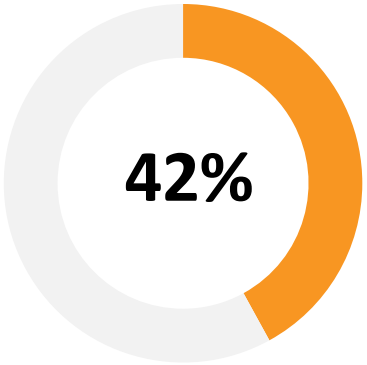
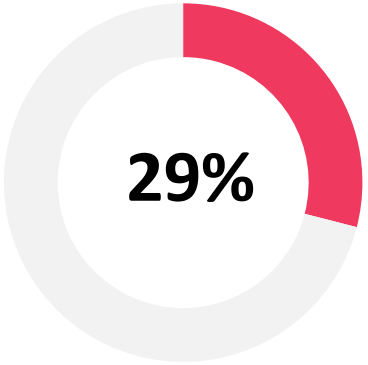
Energy use



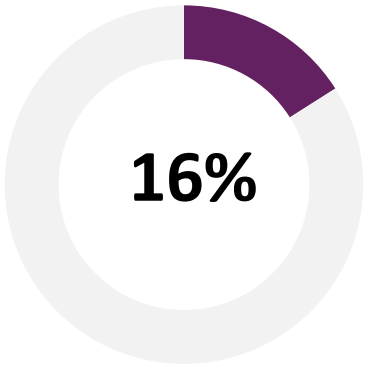
Conscious
(if its convenient)

"I try to conserve energy, but not if it inconveniences me”



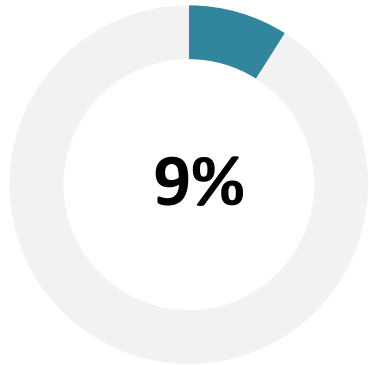
Very conscious
(environment focus)

“I am very conscious about how much energy I use as I try to reduce my carbon footprint”



Very conscious
(cost savings)

"I am very conscious about how much energy I use and try to use it when I know it’s cheaper”



Not conscious
(convenience)

“I use energy when I need it without thinking too much about the cost”

2.7% “Other”
Q40. Which of the following best describes your approach to using energy in your home or business?
BASE: Total (n=718)

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