Business and Residential Customer Workshops

Round Two – Feedback Report

AusNet

December 2023

senateshj grounded in smart thinking

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Executive summary

In August 2023, AusNet engaged SenateSHJ to lead a public consultation process to help inform its submission to the Electricity Distribution Price Review 2026 – 31.

The consultation targets residential customers from three regions (Morwell, Epping and Wangaratta) and residential and business customers (online) from across AusNet's network.

The first round of five workshops, conducted between Tuesday 29 August and Wednesday 6 September 2023, facilitated a high-level conversation about customers' use of electricity and their plans for the future.

Five workshops in round two took place between Tuesday 10 October and Wednesday 18 October and sought to determine:

- customers' views on what AusNet's priorities should be between 2026 and 2031
- what balance of cost and service level AusNet should deliver; and
- where customers stand on sharing the costs of improvements to service levels.

Workshop structure

Round two workshops used presentations, a prioritisation exercise, and four rapid sessions* to generate and guide customer conversations, including:

1. A prioritisation exercise asking customers to prioritise 11 outcomes

2. Rapid session one; topic: reliable supply

3. Rapid session two; topic: enabling customers to charge electric vehicles

4. Rapid session three; topic: improving resilience to extreme weather

5. Rapid session four; topic: enabling solar PV export

*Customers were organised in four groups and asked to nominate a 'table captain'. Each group, led by the table captain, discussed four questions in relation to the topic for that session:

- What outcome (balancing cost and service level) should the network be delivering in 2031?
- Why do you think this?
- How should the cost of achieving this outcome be shared?
- Why do you think this?

Each rapid session ran for between 15 and 20 minutes.

Key observations from workshops

The following themes emerged across the five workshops.

1. **Reliability and resilience are high priorities for residential customers.** Customers expect investment in reliable supply and quick restoration. Many think these improvements should be built into AusNet's regular maintenance programs.

2. **Positions varied on how proactively AusNet should prepare for extreme weather events.** Customers think resilience is important but were split on whether to invest in proactive preparation or prepare for reactive repairs as and when needed. About half recognised the need to be proactive due to worsening weather conditions but some were concerned about the unpredictability of getting it right e.g. "Purely because of the unpredictability and impact. Even if we put money upfront it doesn't guarantee anything."

3. **Residential customers support greater investment in outcomes that improve convenience/flexibility.** Many said that they would accept more costs to enable EV charging and solar exports saying the estimated costs were worthwhile investments if they enabled fast charging at any time and more paid solar exports.

4. **When it comes to enabling EV charging, customers believe beneficiaries should pay…up to a point.** While residential customers supported improvements to the network that enabled charging most preferred the cost of these improvements to be borne by those who benefitted most. However, some suggested that costs should be socialised once a 'tipping point' is reached.

5. **Residential customers in Wangaratta and Epping differ on resilience.** Customers in Wangaratta demonstrated the most awareness of extreme weather events and favoured significant improvements to proactively prepare the network and minimise impacts.

6. **When it came to sharing the costs of improvements, customers were most split on who should bear the cost of enabling solar exports.** Residential customers consistently favoured the sharing of costs to improve reliability and resilience; and were consistent in their view that beneficiaries should pay to enable more charging. However, they were split when it came to sharing the cost of improving solar exports with some saying it was a choice and beneficiaries should pay; while others said that such improvements would benefit all and costs should be socialised.

7. **Business customers support improvement.** Customers were in favour of improved outcomes across all four priorities discussed during the workshop. A higher percentage of customers were willing to pay the amounts noted at the upper end of our scales, to enable more EV charging and solar exports compared to that required for improvements to the reliability and resilience of supply. It should be noted that the amounts required to significantly improve EV charging and solar exports were significantly lower (a smaller trade-off).

8. **Business customers are sensitive to costs.** Support for improvements was driven by factors including reducing costs incurred as a result of disruptions to business. Where most are willing to incur costs as a trade-off, many are cautious about how much they're willing to pay.

Key observations from workshops (continued)

10. **Cost of living pressures influenced how some felt about improvements to the network.** Some customers cited the increasing costs of living as a reason for not supporting improvements or for favouring only minimal improvements i.e. service levels at or close to the status quo.

11. **Residential customers who took part in the online workshop prioritised innovation**. Qualitative answers suggest one reason for this is that they expect innovation to improve outcomes e.g. fewer outages: "I expect significant advances in tech and ability to repair issues faster or avoid them altogether".

12. **Support for greater investment in enabling solar exports was consistently high across all workshops.** Many reasoned that solar was the future, saying that improving this outcome would encourage greater uptake of renewable energy, improve reliability and give customers more control (greater self-reliance).

    Customers believe solar is currently an under-used resource – they do not like the idea of energy being wasted and saw overall benefit in more solar being allowed into the system. Some saw the primary beneficiaries of improvements as those who could export more solar, while others saw primary beneficiaries as those who could use others' excess solar.

13. **Government has a role to play in financing the energy transition**. There is a view that government policy is dictating changes in the energy sector and, as a result, governments have a role to play in financing some of the changes consumers are being asked to consider and/or pay for.

Please note

Every endeavour was made to create and guide discussions that focused participants on the prioritisation of outcomes, trade-offs between costs and service levels, and who should pay for improvements.

Where most of what we heard and captured provided valuable insights into customers' perceptions, we note a specific challenge in containing conversations pertaining to costs i.e. in answer to the question, 'who should pay for improvements?', to discussions that weighed up only cost socialisation and beneficiary pays. Some participants suggested government, AusNet or others should contribute to the cost of improvements and we've included this in our observations in this report.

Residential customer views on cost/service level trade off and sharing the costs of achieving outcomes

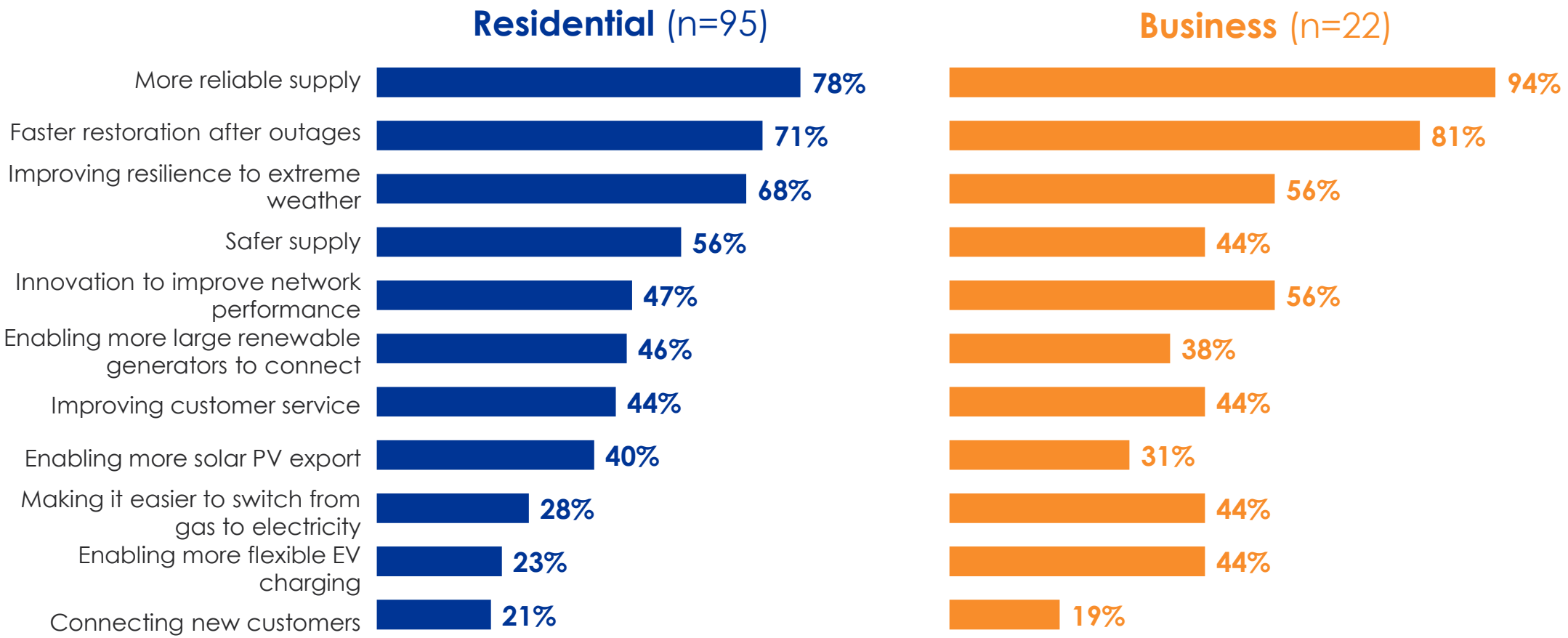
What outcomes should the network deliver in 2031 and why?

- Residential customers are willing to pay more to improve levels of reliability - but not a lot more. The largest group (43%) of respondents nominated the next level of reliability up from today's level (at an unspecified cost but could be estimated at approximately $160). However, the next largest group (23%) were happy to have more outages if it decreased the cost by $50.
- Residential customers favour improvements that enable fast and flexible charging of electric vehicles, particularly because the $40 cost increase was seen to be reasonable and they believe they will ultimately have to have an electric vehicle so they want convenience built into electricity supply now.
- Residential customers are split on proactive improvements to network resilience, with 35% choosing to incur little to no cost even though that will mean more outages than today And, 31% choosing the highest level of proactive improvement, at the highest cost. The cost was not the most important element of this decision, participants wanted to be proactive in an era of increasing climate change, qualified by their uncertainty of incurring costs to pay for improvements which may not be needed or benefit anyone i.e. extreme weather events are unpredictable.
- Most residential customers favour upgrades to allow more solar into the grid, with 73% willing to trade off more costs for improvements. The increase in cost for this to happen ($45) was seen as reasonable and it was seen as 'the right thing to do'.

How should the cost of achieving this outcome be shared and why?

- The majority of residential customers felt that the beneficiary should pay for improved levels of reliability, although some mentioned higher costs should be allocated to businesses that are large users of electricity, and subsidies offered to those that have less ability to pay.
- Residential customers favour the beneficiaries paying for improvements to enable fast and flexible charging of electric vehicles, although it was noted that there will be a 'tipping point' where it will make sense for it to be socialised across all customers. Although it was not specifically quantified, that tipping point was seen to be some time off by most residential customers.
- Although residential customers identified that there are customers who live in areas of greater risk the broad view was that the cost of providing greater resilience should be socialised rather than sit with the direct beneficiaries. Reasons for this included rural areas where there might be greater risk could be farmers who provide food to metropolitan areas as well as the difficulty of deciding which areas to proactively invest in.
- Many residential customers felt that those with the ability to sell excess solar to the grid should pay for the increased capacity as they are the direct beneficiaries, however, there were also many who argued in favour of socialisation so that people would invest in panels and more people could access renewable energy. The 'why' of this question is made more complex because of the perceived expense of investing in solar and the relatively low feed in tariff.

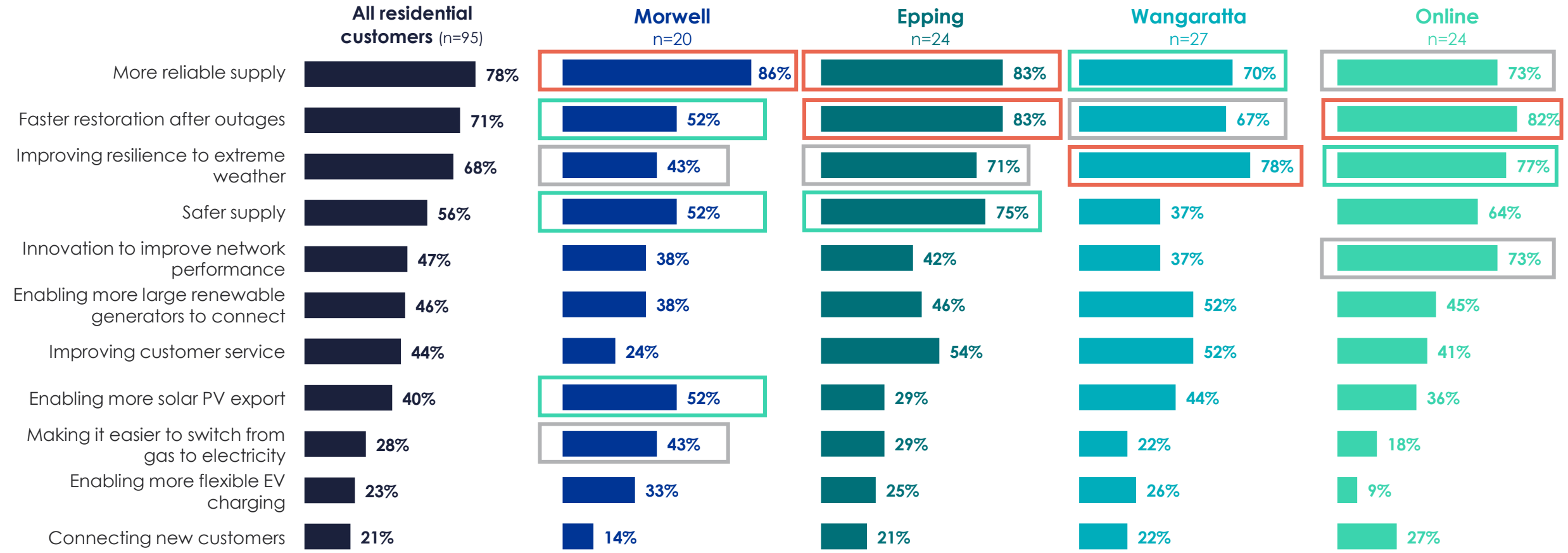
Reliable supply and restoration after outages are the two highest priorities for both residential and business customers



Note: Results above show the percentage of residents and business operators who selected each option as a **HIGH PRIORITY**

We saw some consistency across workshop locations

- **'More reliable supply'**, **'Faster restoration after outages'**, and '**Improving resilience to extreme weather'** rank consistently among the top three priorities across all locations.
- Area-specific priorities include: **Safer supply** (Morwell, Epping); **Enabling more solar PV export** (Morwell), **Making it easier to switch from gas to electricity** (Morwell) and **Innovation to improve network performance** (online).



All numbers based on outcomes rated as **HIGH PRIORITY**

Most prioritised | Second most prioritised | Third most prioritised

02
Residential customers

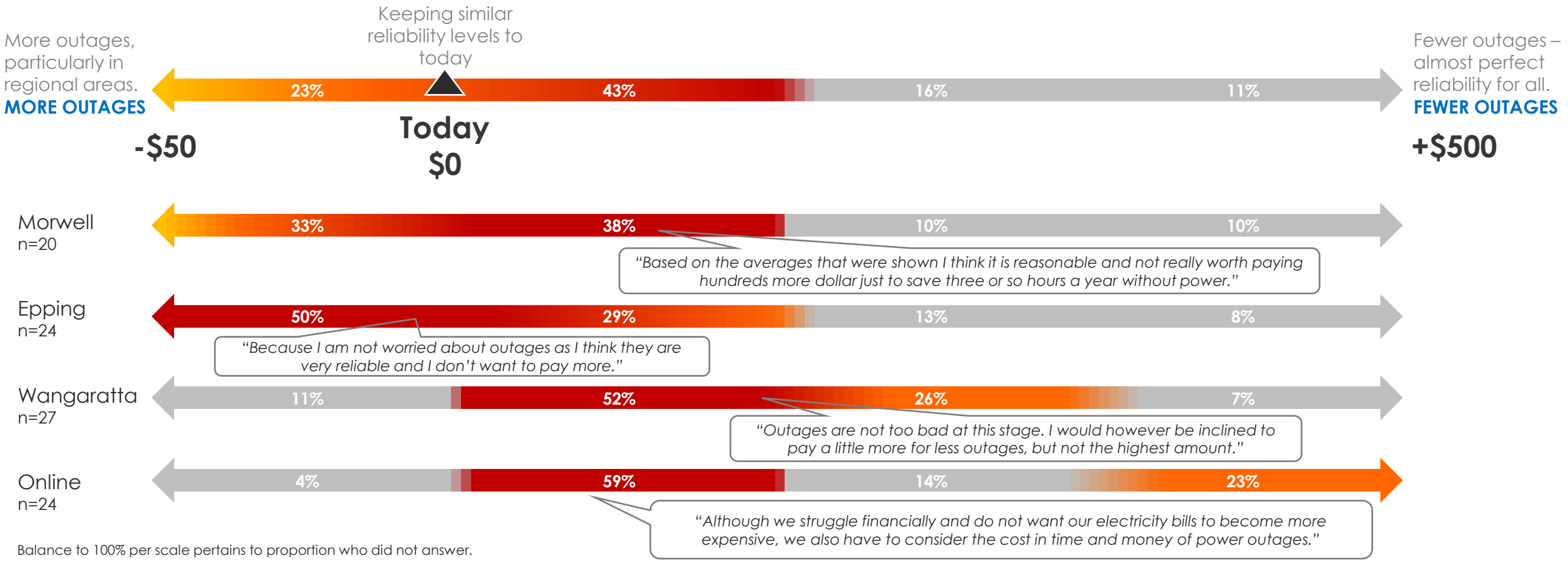
Findings by outcome

- Reliable supply
- Enabling customers to charge electric vehicles
- Improving resilience to extreme weather
- Enabling solar PV export

More reliable supply

Most residential customers are willing to pay more to improve levels of reliability

The scales below depict customers' willingness to trade off costs for changes to service levels. The following slide, 'What customers said', explains the preferences depicted below.



Balance to 100% per scale pertains to proportion who did not answer.

What customers said

What outcomes should the network deliver in 2031 and why?

Residential customers see reliability as one of their top priorities and are willing to pay more to improve levels of reliability - but not a lot more. Most are satisfied with the frequency and duration of outages and are wary of paying too much more for what they believe will be a marginal improvement.

The largest group (43%) of respondents nominated the next level of reliability up from today's level (at an unspecified cost but could be estimated at approximately $160). However, the next largest group (23%) were happy to have more outages if it decreased the cost by $50.

Customers in Wangaratta and in the online group demonstrated a greater willingness to pay more.

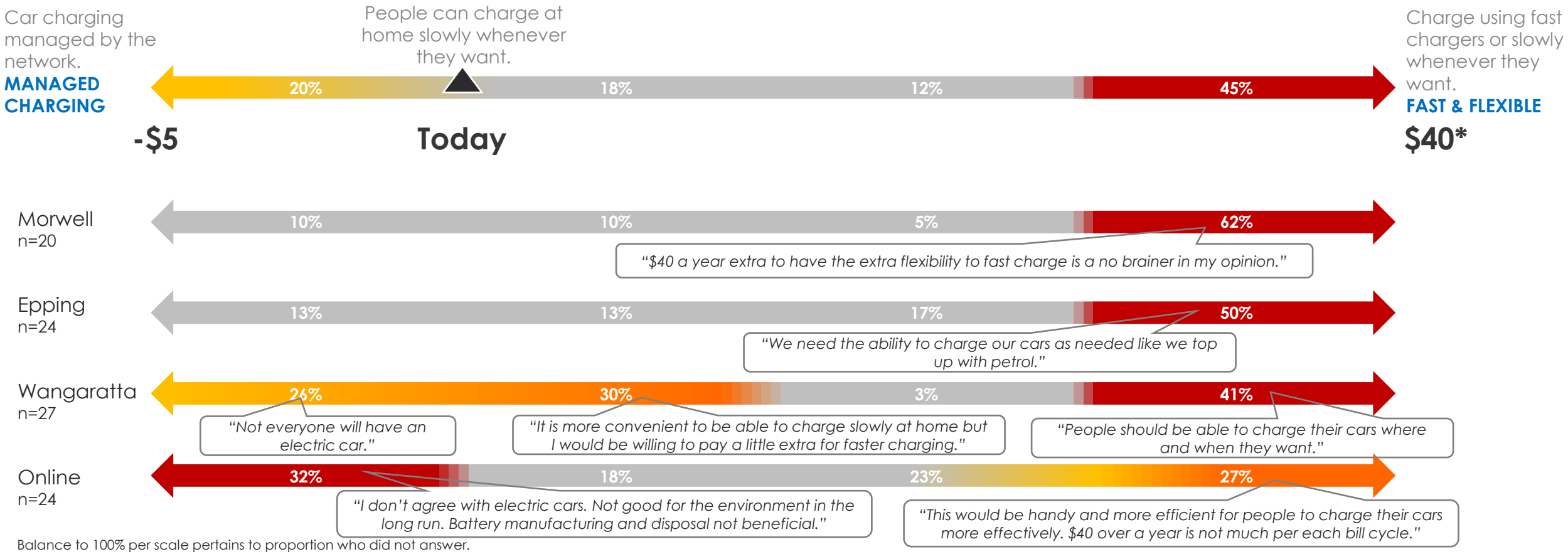
What customers said

- *""I would want to keep the reliability similar to what it is now or somewhat better as long as there isn't a huge increase in cost. It's hard enough to pay for our electricity now let alone in the future. I feel like the reliability is good."*
- *"Current levels seem manageable with no memorable impacts on household e.g. food in freezer staying frozen. More outages may require back up supplies that would have upfront costs higher than savings for a less reliable supply."*
- *"While I'm not affected by outages myself, I'm aware that others in our region are and if we are moving towards a more electricity-dependent society we need to ensure that there are fewer outages."*
- *"Whilst we experience outages, they are fine – as in you can easily cope/work around. I wouldn't like to see cost increase."*
- *"Although we struggle financially and do not want our electricity bills to become more expensive, we have to consider cost in time and money of power outages."*
- *"If we increased reliance on electricity/electric appliances we need reliability. Also increase in extreme weather means that people will need to have access."*
- *"Already very reliable. Don't want to pay more for minimal improvement."*
- *"Not ready to see deductions for outages on the bill. Need to know the fine levels of investment details, seasonal effects on reliability. Inflation plays a big role."*

Enabling customers to charge electric vehicles

Customers support investment in enabling fast and flexible EV charging

The scales below depict customers' willingness to trade off costs for changes to service levels. The following slide, 'What customers said', explains the preferences depicted below.



Balance to 100% per scale pertains to proportion who did not answer.

What customers said

What outcomes should the network deliver in 2031 and why?

Despite not seeing this outcome as a priority, residential customers favour improvements that enable fast and flexible charging of electric vehicles, particularly because the $40 cost increase was seen to be reasonable and they believe they will ultimately have to have an electric vehicle so they want convenience built into electricity supply now.

A minority of customers were comfortable to see a fall in service level and to take the cost saving as they did not see themselves owning an EV in the next 10 years.

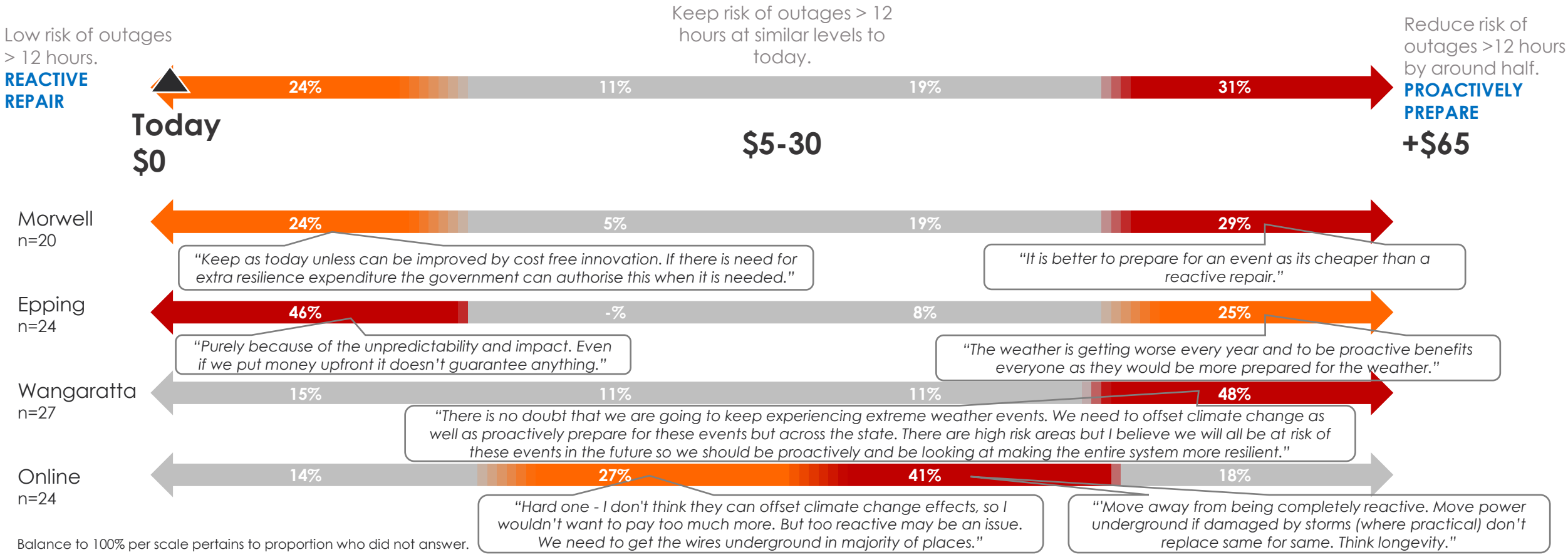
What customers said

- *"I'd like the flexibility to run my EV how and when it is most convenient for me. A person's car gives them independence and freedom! And part of that means coming and going whenever you like at your own convenience."*
- *"$40 a year extra to have the extra flexibility to fast charge is a no brainer in my opinion."*
- *"Fast charging/flexible is key if they want more people to adapt this technology - needs to consider night shift workers, emergency use, people forgetting to charge overnight, can enjoy 1/4 fill vehicle in under 30mins. $40 extra on a bill instead of petrol cost is fair."*
- *"People have different lifestyles - day/night shift workers etc. People should have the freedom to quick charge, whenever they like. In cases like emergencies we shouldn't have to take the hit. AusNet need to update the grid and make this effective."*
- *"I don't agree with electric cars. Not good for the environment in the long run. Battery manufacturing and disposal not beneficial."*
- *"For us to switch from petrol to electric charging we shouldn't be disadvantaged and limited to how and when we charge otherwise there is no incentive to switch as petrol is much quicker and convenient to use."*
- *"Not everyone will benefit. AusNet info says 1 in 5 households with electric vehicle by 2031."*

Improving resilience to extreme weather

Customers are split between investing in proactive preparation and paying for reactive repairs

The scales below depict customers' willingness to trade off costs for changes to service levels. The following slide, 'What customers said', explains the preferences depicted below.



Balance to 100% per scale pertains to proportion who did not answer.

What customers said

What outcomes should the network deliver in 2031 and why?

Residential customers are split on proactive improvements to network resilience, with 35% choosing to incur little to no cost even though that will mean more outages than today. And, 31% choosing the highest level of proactive improvement, at the highest cost.

The cost was not the most important element of this decision. Those supporting greater proactive investment cited reasons including the likely increase in our collective reliance on electricity, in future; and prudence e.g. "smoothing out demand for skilled labour if and when disasters happen". Those who favoured paying for reactive repairs were unwilling to pay for events that may not happen i.e. extreme weather events are unpredictable.

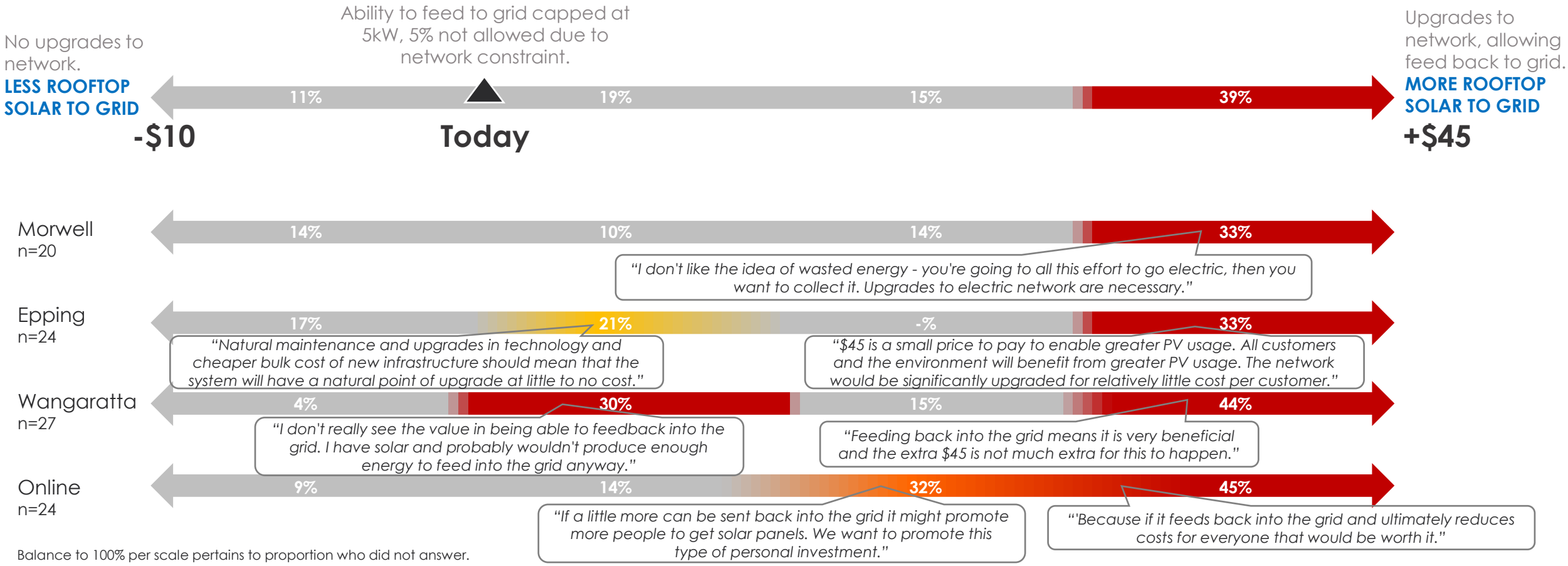
What customers said

- *""Reactive repair, company should keep it maintenance (continuous improvement). Invest in maintenance, cutting trees."*
- *"Natural disasters are historically far and few in between. Reactive repair is based on factual events; anything other is based on fear based thinking. There has not been an increase in natural disasters."*
- *"Proactive preparation would increase reliability and network resilience. Proactive preparation would smooth out the skilled labour demand when a disaster happens."*
- *"Reactive seems to be working. The uncertainty of the location or nature of the extreme weather event is prohibitive."*
- *"I'm more happy to pay extra so that people in remote areas can have a more resilient network. Wangaratta is high risk for floods/storms and fires that damage networks so I'm more than happy to pay extra for this."*
- *"I live in a regional area, isolated, so the stakes for me are higher. Proactive is always better than reactive and as an insurance policy, I'd be willing to pay extra."*
- *"Increased extreme weather events. Natural disasters etc highly stressful to those involved, invest money now to reduce that distress when it occurs."*

Enabling solar PV export

Most customers favour upgrades to allow more solar into the grid

The scales below depict customers' willingness to trade off costs for changes to service levels. The following slide, 'What customers said', explains the preferences depicted below.



Balance to 100% per scale pertains to proportion who did not answer.

What customers said

What outcomes should the network deliver in 2031 and why?

Most residential customers favour upgrades to allow more solar into the grid, with 73% willing to trade off more costs for improvements. The increase in cost for this to happen ($45) was seen as reasonable and it was seen as 'the right thing to do'.

Some hesitation stems from not having solar panels to begin with, lack of confidence/knowledge with the technology, and not seeing the end benefit of this service.

What customers said

- *"I don't like the idea of wasted energy - you're going to all this effort to go electric, then you want to collect it. Upgrades to electric network are necessary."*
- *"Feeding all energy back into the grid will be the most efficient way to utilise the energy produced. Possibly another option could be if your property cannot feed back into the grid due to the network not being able to handle it. These people could be eligible for a bigger rebate to install batteries or towards an EV."*
- *"$45 is a small price to pay to enable greater PV usage. All customers and the environment will benefit from greater PV usage. The network would be significantly upgraded for relatively little cost per customer."*
- *"I don't really see the value in being able to feedback into the grid. I have solar and probably wouldn't produce enough energy to feed into the grid anyway."*
- *"I think this is needed to move us to become even more of a solar society. We already produce so much energy from solar that we need a system that can cope better with this as we are only going to get more solar powered homes."*
- *"Not everyone can have solar, too much shade. If I can't substantially reduce my power bills, then paying to have the infrastructure installed is less appealing. I shouldn't have to pay more to allow others to have cheaper electricity than I do."*

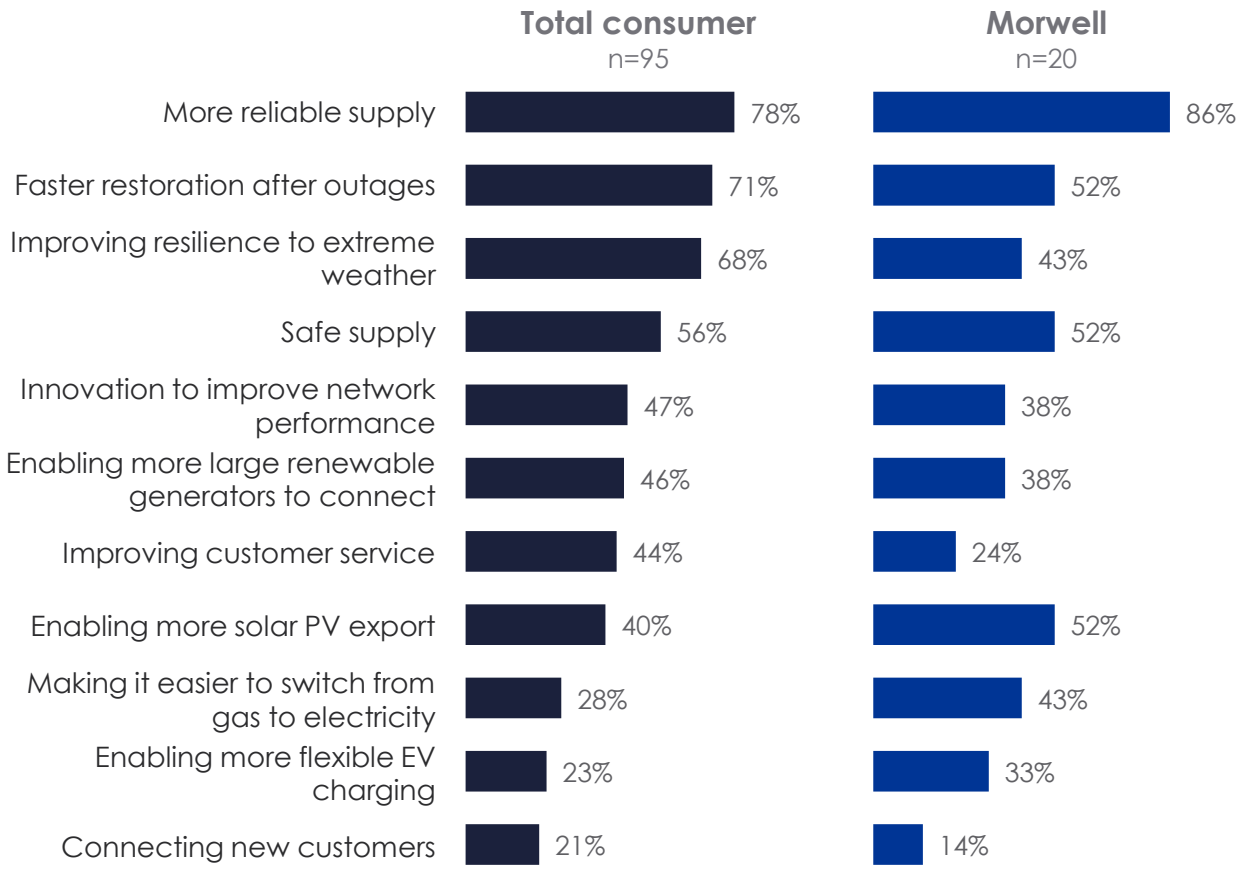
Findings by workshop

- Morwell
- Epping
- Wangaratta
- Online (residential)

Morwell

Summary of feedback from Morwell workshop

Prioritisation exercise: comparing all residential participants and participants in Morwell



Overall workshop observations

- Overall, Morwell customers expect reliability and resilience; and prefer investment in improvements that enable greater flexibility/convenience in future.
- Customers are more inclined to bear additional costs to charge EVs as and when they want, and/or export more solar. Many expect that the beneficiaries of these improvements should bear the cost until the adoption of these technologies (EVs/solar) reaches a tipping point – at which point costs should be shared/socialised.
- Where reliability is seen as the highest priority, most are happy with the supply they're receiving today and/or are unwilling to pay more to improve reliability of supply.
- Network reliability and resilience is expected and customers are less inclined to pay more for improvements that lead to fewer outages and/or greater resilience (proactive preparation/reactive repairs). Some see this as the government's and/or AusNet's responsibility.

How did customers in Morwell respond to questions about reliable supply?

What outcomes should the network deliver in 2031 and why?

- Most Morwell customers were inclined to **retain current levels of reliability** – 71% chose a place on the spectrum close to the status quo.
- Customers were either **happy with reliability and/or unwilling to pay more** to improve reliable supply.
- Some felt that **electricity is essential and reliability should improve as a matter of course** (through regular **maintenance**). And, that this should be AusNet's responsibility.
- Some expressed concerns about reliability given plans to close coal-fired power stations.

What customers said

- *"Whilst we experience outages, they are fine – as in you can easily cope/work around. I wouldn't like to see cost increase."*
- *"Current levels seem manageable with no memorable impacts on household e.g. food in freezer staying frozen. More outages may require back up supplies that would have upfront costs higher than savings for a less reliable supply."*
- *"I don't want to pay any more or as little as possible. Why isn't AusNet improving reliability now?"*
- *"Keep similar to today. Reliability will naturally improve as users get their own back-up batteries or EVs."*

How should the cost of achieving this outcome be shared and why?

- **Customers were split on this question** – some supported the idea of socialised cost saying all should share the burden. Some suggested costs should be shared so as not to disadvantage people in rural and regional areas. Of those suggesting that beneficiaries should pay, some said that the level of reliability should be a choice i.e. pay more for better service.
- Some suggested the government and/or AusNet should pay (invest its profits)
- A number of customers distinguished between rural/regional and metropolitan Victoria, suggesting that **metropolitan customers should bear more of the cost.**

What customers said

- *"I'm a believer of socialised cost so that we can all share the burden/savings to be had."*
- *"I think the people who benefit from the improvement should pay."*
- *"Combination of all customers and profits from private company that runs transmission/supply – primarily the owner of the network."*
- *"Socialise the payment. Innovation should make things cheaper (i.e. smart meters). Automation should make it cheaper."*
- *"It's not fair for rural or regional to pay for it. Government should pay for it, they should cover the costs. Metro should have to compensate regions (socialised and beneficiary)."*

How did customers in Morwell respond to questions about enabling customers to charge EVs?

What outcomes should the network deliver in 2031 and why?

- Most Morwell customers (62%) indicated a **preference for prioritising the improvement of the network** to allow customers to charge EVs i.e. allowing for fast charging at any time.
- Many saw the potential increase in their bills ($40) as an acceptable trade-off for flexibility/choice (**agency/convenience over cost**).
- Some of this (preference for enabling charging) may have been driven by the notion of having many more EVs on our roads soon.

What customers said

- *"$40 a year extra to have the extra flexibility to fast charge is a no brainer in my opinion."*
- *"It should be the person's choice as to when they charge their car at a time that works for them."*
- *"With so many electric cars forecast it makes sense and $40 over a year is nothing."*
- *"I'd like the flexibility to run my EV how and when it is most convenient for me. A person's car gives them independence and freedom! And part of that means coming and going whenever you like at your own convenience."*

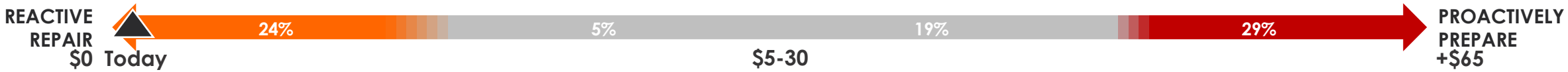
How should the cost of achieving this outcome be shared and why?

- Most preferred **beneficiaries to pay** i.e. owners of EVs to foot most of the bill for network improvements.
- A number of customers suggested **beneficiaries should pay until a tipping point** i.e. when most Victorians owned/drove EVs.

What customers said

- *"If they can afford an EV they can pay for it. Will not benefit non-EV users."*
- *"The owner should pay initially until 60-75% uptake then socialise."*
- *"I think this should be covered by the owner until such a time where EV owners are, or close to, over 50% of vehicles on the road/being bought. After that I would socialise the cost as the benefits would benefit the majority of people on the network."*
- *"People with electric cars till 80% of the population have EVs."*

How did customers in Morwell respond to questions about improving resilience to extreme weather?



What outcomes should the network deliver in 2031 and why?

- Customers were split with **29% favouring the proactive preparation** of the network to minimise the impact of extreme weather on customers; and **24% preferring to wait for an event to happen** and then invest in repair.
- Those in favour of reactive repair cited reasons including the **possibility of waste** i.e. that such investments/improvements may not benefit customers; and a **reluctance to incur more costs**. Those in favour of proactive improvements reasoned that the expected increase in reliance on electricity made such investments/improvements more important.
- Many see resilience as AusNet's responsibility i.e. they think **AusNet should be investing** either proactively or reactively to prepare/repair the network.

What customers said

- *"As the proprietor of an energy supply store, AusNet should be proactively reducing the risk of outages by maintaining their system and having a maintenance program to fix issues before they become an issue or by a risk reduction programme such as undergrounding transmission/distribution lines."*
- *"Reactive repair, company should keep it maintenance (continuous improvement). Invest in maintenance, cutting trees."*
- *"AusNet should already be working on this with its profit. It's called continuous improvement - underground cables. Clean trees."*
- *"I think the need to be proactively working to prevent the impact of natural disaster impacting our power system."*

How should the cost of achieving this outcome be shared and why?

- We heard a mix of responses to this question with many indicating a preference for costs to be socialised i.e. that all customers should bear the costs of improving network resilience.
- A minority believe that those who benefit most should pay e.g. via a surcharge imposed on high-risk customers and a few suggested the government and/or AusNet should contribute.

What customers said

- *"Across all customers. Surcharge for high risk customers/areas"*
- *"Socialised - but really AusNet should pay because they are the ones responsible for distributing the service which we all need. It's a necessity"*

How did customers in Morwell respond to questions about enabling solar PV export?

What outcomes should the network deliver in 2031 and why?

- **Preferences were reasonably evenly distributed**. Most customers (33%) indicated a preference for upgrading the network to allow all excess energy produced by new rooftop solar to be fed back into the grid.
- Some customers suggested **alternatives to network upgrades to enable exports** e.g. investment in, or rebates for, batteries/energy storage.
- **Low feed-in tariffs are seen as a reason to not invest** in upgrading the network to enable exports e.g. "the return from feeding into the grid is not substantial enough for me".

What customers said

- *"I don't like the idea of wasted energy - you're going to all this effort to go electric, then you want to collect it. Upgrades to electric network are necessary."*
- *"I think in the long term it would help paying back the initial cost of installing."*
- *"Feeding all energy back into the grid will be the most efficient way to utilise the energy produced. Possibly another option could be if your property cannot feed back into the grid due to the network not being able to handle it. These people could be eligible for a bigger rebate to install batteries or towards an EV."*
- *"Storage and Self Consumption more important."*

How should the cost of achieving this outcome be shared and why?

- Customers were inclined to have costs borne by those who benefited from network improvements enabling solar exports.
- Some felt that **customers were already paying enough to buy and install solar panels and batteries** i.e. if customers pay for the equipment to generate and store electricity they shouldn't also have to pay for the network.

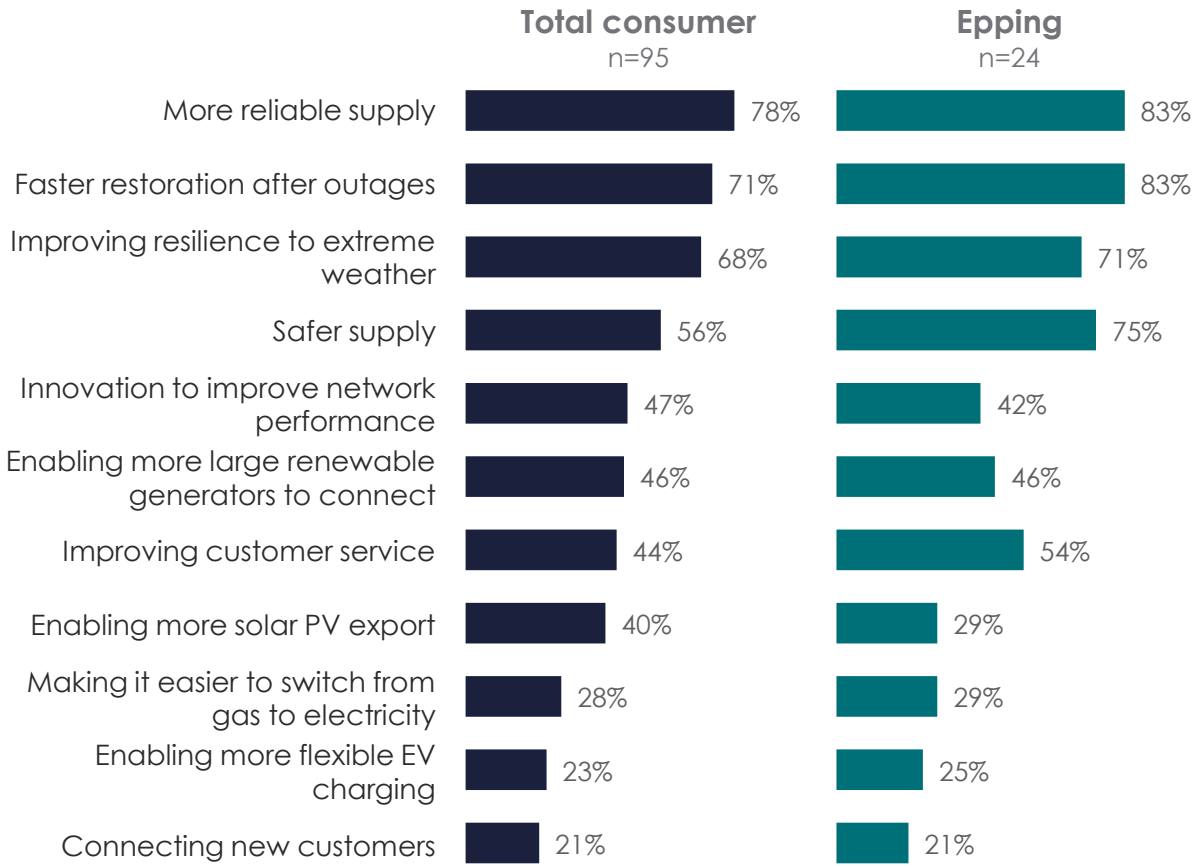
What customers said

- *"Beneficiaries who benefit from solar panels should pay for upgrades."*
- *"Consumers already pay to get solar/batteries and they should not be made to pay for infrastructure improvements."*
- *"AusNet should pay to upgrade their network as customers are already paying thousands to generate solar."*

Epping

Summary of feedback from Epping workshop

Prioritisation exercise: comparing all residential participants and participants in Epping



Overall workshop observations

- Overall, customers in Epping saw outcomes that ensured reliable supply as a priority but were more inclined to pay more for improvements that future-proofed the network i.e. more charging and solar exports.
- This preference seems to be driven by factors including:
    - Customers see outcomes such as reliability and resilience as essential and therefore the responsibility of government/AusNet
    - Uncertain 'returns' i.e. customers would rather not pay to prepare for extreme weather events that may not happen
    - Improving the network to enable charging and solar is to enable flexibility/choice/convenience. It is seen as an investment in the future.
- When it comes to sharing the costs of improvement, most Epping customers preferred that those benefiting from improved reliability and better charging foot the bill.
- However, opinions varied when it came to paying for resilience and enabling solar exports:
    - Resilience – some suggested that this should be 'zone based' i.e. those in high-risk areas pay more, while others saw this as a collective responsibility
    - Enabling solar – customers were split between socialised costs and beneficiaries pay. However, profit was a recurring theme i.e. customers suggested those profiting from exports (including companies that profit by selling excess supply) should pay more.

How did customers in Epping respond to questions about reliable supply?

What outcomes should the network deliver in 2031 and why?

- Most Epping customers were inclined to **retain current levels of reliability** – 79% chose a place on the spectrum close to the status quo.
- Customers said **they were happy with the number/duration of outages** they experienced and did not see the need to pay more to improve this e.g. *"I just had one outage this year and that was for 5-10 minutes. I am happy with AusNet delivery"*.
- Some cited the **already high costs of electricity** as a reason for not wanting to pay more.
- Those indicating a preference for investment to reduce outages cited reasons including, "to protect the vulnerable".

What customers said

- *"If reliability levels can be maintained at current levels in 2031 despite the costs of transitioning to renewable energy sources, current levels of reliability are sufficient and would not negatively impact cost of service."*
- *"Already very reliable. Don't want to pay more for minimal improvement."*
- *"Not ready to see deductions for outages on the bill. Need to know the fine levels of investment details, seasonal effects on reliability. Inflation plays a big role."*
- *"I would want to keep the reliability similar to what it is now or somewhat better as long as there isn't a huge increase in cost. It's hard enough to pay for our electricity now let alone in the future. I feel like the reliability is good."*

How should the cost of achieving this outcome be shared and why?

- More customers indicated a preference for '**beneficiary pays**'. Where many offered simple explanations for this e.g. "the more you use, the more you pay", some offered more nuanced explanations e.g. suggesting **higher income earners, businesses and landlords should pay more** while tenants pay less.
- Some suggested government should contribute to costs e.g. "as we pay taxes, infrastructure should be provided by government to a greater extent".

What customers said

- *"Critical infrastructure should be a shared cost. What portion will AusNet + gov't pay? Remote areas are often more vulnerable and should have critical infrastructure in place to support them. It goes to equity across the community."*
- *"If there are additional costs to share, then it should be weighted towards the people who have the greatest choice and flexibility i.e. people who can afford PV - Building owners - renters and tenants should be shielded from price increases as they have no choice regarding PV, batteries etc."*
- *"Depending on where the money is spent to improve reliability. If it is a regional focus/spend, regional customers should pay higher costs."*

How did customers in Epping respond to questions about enabling customers to charge EVs?

What outcomes should the network deliver in 2031 and why?

- Most customers supported investing to improve the network to enable better EV charging. The **main reason cited for this was wanting flexibility/safety** i.e. the ability to charge quickly when needed especially in an emergency.
- Those who deprioritised this cited **inequity and costs** as reasons i.e. that the investment would only benefit EV owners.

What customers said

- *"$40 per year is a reasonable amount to pay to upgrade the network to handle fast and flexible charging, the upgrades would also benefit the networks capacity overall."*
- *"Fast charging/flexible is key if they want more people to adapt this technology - needs to consider night shift workers, emergency use, people forgetting to charge overnight, can enjoy 1/4 fill vehicle in under 30mins. $40 extra on a bill instead of petrol cost is fair."*
- *"I am impatient, the faster the better."*
- *"Not everyone will benefit. AusNet info says 1 in 5 households with electric vehicle by 2031."*

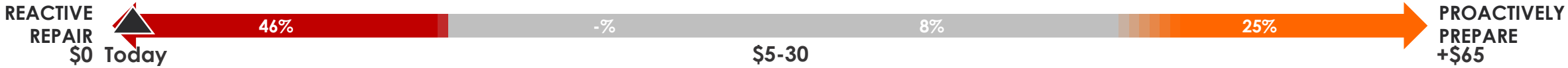
How should the cost of achieving this outcome be shared and why?

- Most Epping customers indicated a **preference for 'beneficiary pays'** i.e. EV owners pay for network improvements.
- Some suggested that the **government and car manufacturers should share** in the costs of improvement.

What customers said

- *"If you choose to own one, you should pay what it costs to run one."*
- *"Only the EV owners should bear the cost as they are not sharing the savings."*
- *"Individually and depending on how much you use individually. Car manufacturers should foot some of the bill and the government."*
- *"Since the government is paying this agenda, they should contribute the most, followed by the vehicle manufacturers."*

How did customers in Epping respond to questions about improving resilience to extreme weather?



What outcomes should the network deliver in 2031 and why?

- Most Epping customers indicated a **preference for reactive repairs** i.e. not investing in proactive preparation.
- Uncertainty appears to be the main reason for this. Many were unwilling to pay more for **events that may not happen.**
- Those who favoured investing in proactive preparation cited **prudence** as the main reason for this e.g. **'smoothing out' the demand for skilled labour** if and when disasters happen; and preparing ourselves for the likelihood that **we'll experience extreme events more frequently.**

What customers said

- *"Natural disasters are historically far and few in between. Reactive repair is based on factual events; anything other is based on fear based thinking. There has not been an increase in natural disasters."*
- *"Don't spend money on things that end up being never affected by extreme weather. A small amount can be spent on prioritised risk areas/infrastructure."*
- *"Reactive seems to be working. The uncertainty of the location or nature of the extreme weather event is prohibitive."*
- *"Proactive preparation would increase reliability and network resilience. Proactive preparation would smooth out the skilled labour demand when a disaster happens."*
- *"Peace of mind. Move services underground where possible."*

How should the cost of achieving this outcome be shared and why?

- Epping **customers were split** on how the cost of achieving this should be shared. **More customers felt that payment should be 'zone based'** i.e. that those in high-risk areas should pay more e.g. by paying a levy/surcharge.
- Some preferred socialised costs suggesting **network resilience was a collective responsibility.**
- Customers also suggested government and AusNet should share the cost e.g. "I believe there should be government input in improving and maintaining infrastructure. Also, providers like AusNet should be able to bear some rather than putting everything on customers."

What customers said

- *"All AusNet customers in the affected zone share costs for reactive repair."*
- *"Customers should have that option when signing up to their company."*
- *"Across all customers. Surcharge for high-risk customers/areas."*
- *"Customers share costs for reactive repairs. Zoning/High risk customer areas pay premium costs."*
- *"High risk zones/councils/gov't tax on polluters."*
- *"The cost should be shared evenly among all customers who are not on a concession benefit (age pension, parenting payment, job seeker etc)."*
- *"We should all pay for this as it affects everyone."*

How did customers in Epping respond to questions about enabling solar PV export?

What outcomes should the network deliver in 2031 and why?

- Most Epping customers (54%) demonstrated a **preference for investing in network improvements to enable solar exports,** noting that solar generation is 'the way of the future' and would reduce household costs.
- Customers were **cautious about the increase in cost required** to make this happen – 33% preferring substantial investment and 21% favoured only a marginal increase.
- Some suggested that **network improvements should be part of regular maintenance** and therefore not require significant additional investment.
- Customers mentioned greater investment in/**prioritisation of storage** and the need for **better feed-in tariffs.**

What customers said

- *"$45 is a small price to pay to enable greater PV usage. All customers and the environment will benefit from greater PV usage. The network would be significantly upgraded for relatively little cost per customer."*
- *"This is the way of the future."*
- *"In principle, I am all for an upgrade so that solar energy generated is not wasted. Would the extra cost incurred by customers be better spent storing the energy in a household battery?"*
- *"It doesn't affect me and I don't know enough but I don't need higher bills."*
- *"I want some return on my investment. Isn't the whole point renewable?"*

How should the cost of achieving this outcome be shared and why?

- Epping customers expressed **varied views** including that costs should be shared equally (**socialised**), AusNet should wear some cost, landlords should pay and those with solar should pay more.
- **Profit was a recurring theme** in answers i.e. those making money out of exports including power companies who sell excess supply, should bear the cost of network improvements.

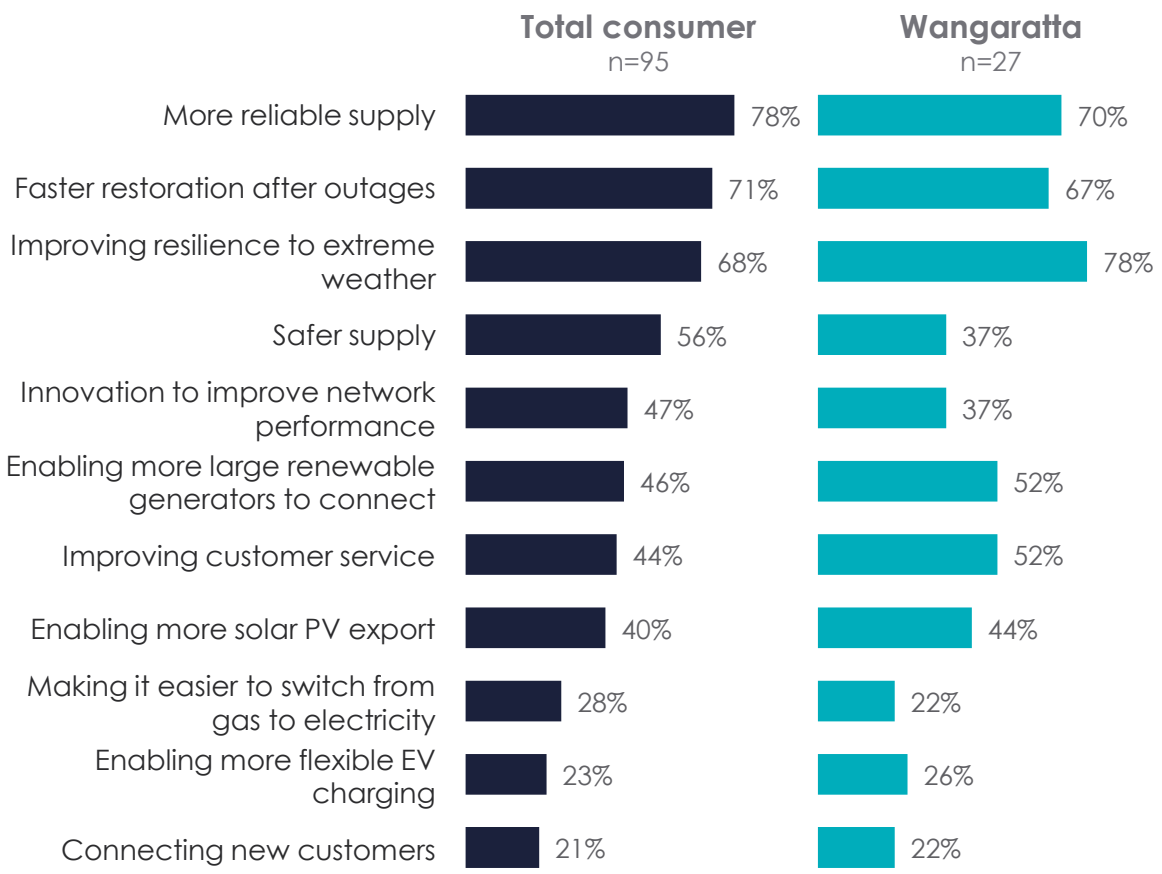
What customers said

- *"Upgrade should occur, AusNet should fund it from profits from buying electricity from solar panel owners. Retailers should contribute. Renters should definitely not have to pay."*
- *"Equally by all customers not on a concession benefit (age pension, parenting payment, job seeker, disability etc)."*
- *"Zero cost to the user since power companies buy at low rates and sell back at high rates."*
- *"Feeding back into the grid should be a free service and shared with all solar customers."*

Wangaratta

Summary of feedback from Wangaratta workshop

Prioritisation exercise: comparing all residential participants and participants in Wangaratta



Overall workshop observations

- Customers in Wangaratta were more inclined to **pay a little more for reliability, and substantially more to improve resilience**. They were more likely to **cite altruistic reasons** for this e.g. "I'm more happy to pay extra so that people in remote areas can have a more resilient network".
- Of the four customer workshops, customers in Wangaratta were **most aware of/concerned about the impacts of extreme weather** events.
- **85% of customers favoured network improvements to improve reliability** but most preferred a small increase in cost to do so. Customers felt that improvements are necessary to cope with increasing demand and to support customers in rural/remote areas.
- Customers were split when it came to enabling EV charging. Where most were in favour, nearly 30% preferred the status quo or less i.e. preferring managed charging. They reasoned that **investment to improve the network to this end would only benefit a few**.
- Customers indicated a **preference for cost sharing** for better outcomes in reliability and resilience and a preference for 'beneficiary pays' for improvements to enable better charging. Opinions varied with regard to enabling solar exports with some suggesting that **costs should be borne by those benefiting from exports until more people used solar**.

How did customers in Wangaratta respond to questions about reliable supply?

What outcomes should the network deliver in 2031 and why?

- Most customers in Wangaratta were **in favour of network improvements** to improve reliability with 85% saying they'd accept higher costs.
- Most **support a small increase in cost** (a little more than they pay today) saying they were **happy with current levels of reliability.**
- Customers feel **improvements are necessary to cope with increasing demand** e.g. as a result of the transition to renewables and 'adverse weather'.
- Some customers cited the **need to support those in rural/remote areas** as a reason to improve the network.

What customers said

- *"Because more demands will mean more stress on the system, so we would mostly be happy to pay a little more."*
- *"If we increased reliance on electricity/electric appliances we need reliability. Also increase in extreme weather means that people will need to have access."*
- *"While I'm not affected by outages myself, I'm aware that others in our region are and if we are moving towards a more electricity-dependent society we need to ensure that there are fewer outages."*
- *"I've never had any issues with my electricity reliability. But we should help improve reliability for farmers, etc."*

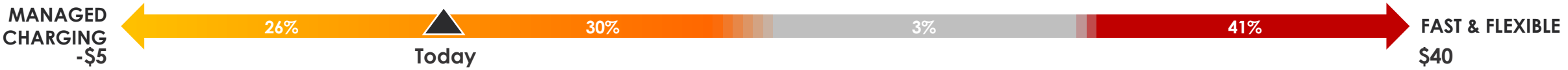
How should the cost of achieving this outcome be shared and why?

- Most customers **preferred costs to be shared** but in a way that distinguished between larger users e.g. businesses (should pay more) and those who need support (offered subsidies).
- Some suggested that those benefiting most from improved reliability should pay more.

What customers said

- *"Fewer outages at no customer cost. Companies benefiting from service should bear the infrastructure cost."*
- *"Everyone should pay but there should be subsidies for those on low income. Not based on location."*
- *"This cost should be covered by those with the financial means. Concession holders should be required to pay even less than they already are considering that even now in 2023 people cannot afford to pay their bills. It should NOT be based on who benefits. Everyone deserves access to electricity no matter their geographic location or circumstances."*
- *"I think it should be shared around all customers. We rely on each other. We rely on farmers etc -> they produce our food etc. - benefits them, therefore benefits us."*

How did customers in Wangaratta respond to questions about enabling customers to charge EVs?



What outcomes should the network deliver in 2031 and why?

- Most customers **favoured improving the network to enable EV charging**. Many cited **flexibility and convenience** as the reason for this i.e. being able to charge quickly when they need to; and some mentioned the need for **greater reliability** as more EVs took to the road.
- Those preferring the status quo or for there to be less investment in improving the network felt that **improvements would benefit only a few** and/or they were happy to charge slowly and not incur more costs. Some weren't planning on buying an EV.

What customers said

- *"If there is going to be such an increase in EVs then the network needs to be reliable - they deserve to have a good network if they choose to have an EV."*
- *"People have different lifestyles - day/night shift workers etc. People should have the freedom to quick charge, whenever they like. In cases like emergencies we shouldn't have to take the hit. AusNet need to update the grid and make this effective."*
- *"People should be able to charge their cars where and when they want."*
- *"Not everyone will have an EV so shouldn't be charged more."*
- *"It is more convenient to be able to charge slowly at home but I would be willing to pay a little extra for faster charging."*
- *"Today, prices of EV are already high enough. Batteries too expensive. Everything is put on the customers side for the benefit of the company."*

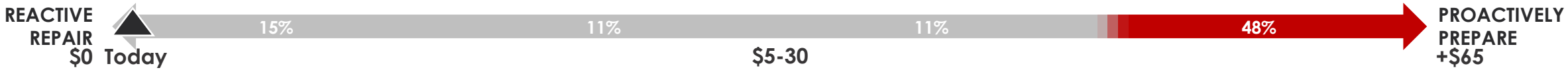
How should the cost of achieving this outcome be shared and why?

- Most said that **those with EVs should pay for improvements** to the network to enable charging.
- A minority said costs should be shared by everyone to improve access to EVs.
- Some suggested **costs should be borne by companies** that own charging stations, AusNet, car manufacturers and the government.

What customers said

- *"If EV owners wish to charge faster then they should pay for solar/batteries."*
- *"If private companies are profiting from charging stations, those companies should foot bills for increase costs associated with increasing infrastructure."*
- *"The cost should be carried by those who can afford an EV in the first instance who are usually the most privileged members of society and thus can afford to bear this cost."*
- *"Customers with EVs should be able to charge their EV at home or work. (Maybe workplaces put in charging docks?) Workplaces/councils get incentives and money from government to put these in. When charging at home EV owners should pay for this on their own. If AusNet provide power poles, why don't they supply charging docks?"*

How did customers in Wangaratta respond to questions about improving resilience to extreme weather?



What outcomes should the network deliver in 2031 and why?

- Most customers **favoured paying more to proactively prepare the network** for extreme weather events citing the **need to ensure reliable supply to those living in remote areas, the increasing frequency of weather events, and the growing likelihood that more will be affected.**
- Some suggested **reactive repairs should improve assets.**
- Some commented on the likelihood of reactive repair becoming more expensive than prevention **"prevention is better than cure".**

What customers said

- *"I'm more happy to pay extra so that people in remote areas can have a more resilient network. Wangaratta is high risk for floods/storms and fires that damage networks so I'm more than happy to pay extra for this."*
- *"In extreme weather-prone areas, these should have more proactive prepares. In the event of a disaster, putting investment into a quicker (where appropriate) repair - ensuring they are made resilient."*
- *"Customers should only pay from property line to house. Any proactive approach, prices should be absorbed by AusNet. Customers already pay too much for a mediocre service."*
- *"Increased extreme weather events. Natural disasters etc highly stressful to those involved, invest money now to reduce that distress when it occurs."*

How should the cost of achieving this outcome be shared and why?

- Most said that the cost of improvement should be **shared by all.**
- Some suggested that customers should only **pay for improvements from their property line to the house** and that AusNet/the government should bear the cost of improvement otherwise.
- A minority suggested that those who benefit most from improved resilience e.g. **those who live in disaster prone areas, pay**.
- Other responses included: government/councils, and/or companies causing climate change should contribute to costs.

What customers said

- *"If living in a place where outages rarely happen I don't see why I should pay for others that chose to live somewhere where outages are prone due to fires, floods, etc."*
- *"I think communities that are known to be flood-prone areas or living in the bush should have to pay more or deal with power outages."*
- *"Councils perhaps? In the affected areas where proactive preparations have taken place or are to take place. State government, AusNet and then the consumer. Also the electricity company that profits from the power should foot bill for improvements to infrastructure."*

How did customers in Wangaratta respond to questions about enabling solar PV export?

What outcomes should the network deliver in 2031 and why?

- **Most favour improving the network** to enable solar export. Reasons for this include **lowering generation costs, taking pressure off generators, preparing the network for growing demand and improved environmental outcomes.**
- Those preferring the status quo cite reasons including **already owning batteries** (and not needing to feed back into the grid) and not wanting to "provide a multimillion-dollar company 'free' power".
- Some customers favoured improvement in order to **not waste energy** being generated.

What customers said

- *"I don't really see the value in being able to feedback into the grid. I have solar and probably wouldn't produce enough energy to feed into the grid anyway."*
- *"Would result in increased uptake of solar panels. Improved environmental outcomes."*
- *"We should be aiming and encouraging as much renewable energy as possible."*
- *"I think this is needed to move us to become even more of a solar society. We already produce so much energy from solar that we need a system that can cope better with this as we are only going to get more solar powered homes."*
- *"I am already hit with the capped KW so an upgrade would benefit me. However it only benefits if I get reimbursed for the solar imported into the grid, otherwise there is not much point."*

How should the cost of achieving this outcome be shared and why?

- Opinion is **split between cost socialisation and beneficiaries pay**. Those suggesting that beneficiaries should pay reason that it's **unfair for those not feeding in to have to pay**, while some in favour of socialisation reasoned that everybody stands to benefit.
- We also heard that **there could be a tipping point in future** when we moved from beneficiary pays to cost socialisation as solar becomes more commonplace.
- Some suggest that AusNet and/or the government should pay, reasoning that customers already pay for the purchase and installation of solar panels; and that the grid is the government's/AusNet's responsibility.

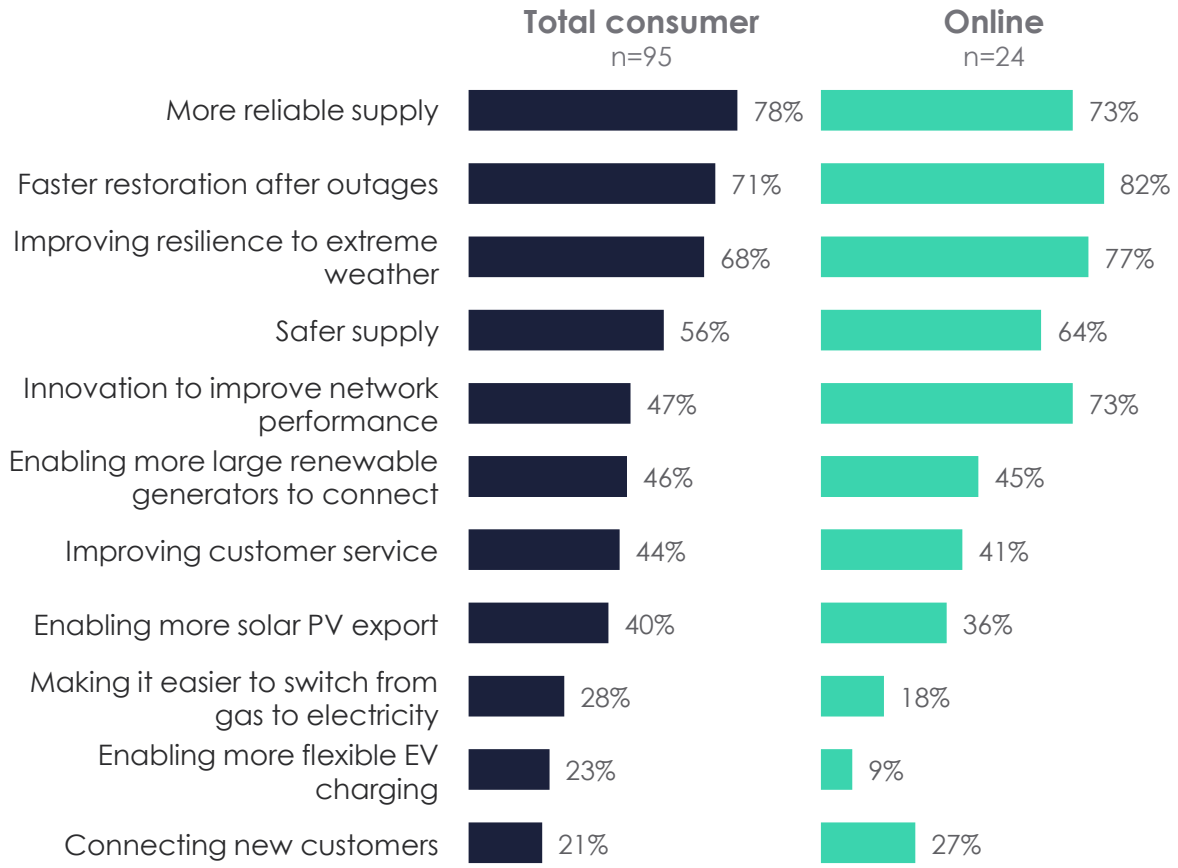
What customers said

- *"Initially, costs shared by customers sending excess back. As more people get solar, maybe shared by everyone."*
- *"Improving the grid is a government responsibility and consumers have already covered the costs for installation."*
- *"Those who want to feed substantial amount (unlimited) should perhaps pay a reasonable fee to go towards infrastructure upgrades."*
- *"Everyone benefits from more electricity being made available."*
- *"User pays. All new improvements should be paid by new customers."*
- *"If this is a government push (more renewable energy) then they should contribute significantly. Consumers have already contributed via buying the solar panels."*

Online (residential customers)

Summary of feedback from online workshop with residential customers

Prioritisation exercise: comparing all residential participants and online workshop participants



Overall workshop observations

- Customers were willing to incur more costs to improve the reliability of the network but were disinclined to pay much more than they are today for improvements. They reasoned that our growing reliance on electricity (more people working from home and owning EVs) makes reliability more important but cited increasing costs of living and a general satisfaction with current levels of reliability as reasons for only a limited appetite for increased costs.
- Almost all customers were in favour of investing in the network to proactively prepare for extreme weather. They cited reasons including the likelihood that such events may happen more frequently and our growing reliance on electricity. Many reflected on the importance of conducting repairs for the long term i.e. not replacing damaged infrastructure with the same e.g. putting infrastructure underground.
- Customers see solar generation as the future and most are willing to incur costs to enable more exports. The reason being that improving this outcome will encourage greater solar generation, benefit the environment and give customers greater control.
- Some customers expressed distrust of technology e.g. the technology in EVs; and said they were concerned about the quality of solar equipment and installation.

How did residential customers (online) respond to questions about reliable supply?

What outcomes should the network deliver in 2031 and why?

- Almost all customers (**96%) are willing to incur more costs** to make the network more reliable, but **most prefer paying close to what they already are.**
- **Main reason is that greater reliability is necessary as we become more dependent on electricity** e.g. working from home and more EVs; and to account for hotter/colder conditions.
- Reasons cited for this cautious approach include existing financial burdens (**costs of living**); being 'happy' with current levels of reliability and so not wanting to incur too much more; the cost of outages e.g. wasted food.
- Some expect that **innovation will improve reliability.**

What customers said

- *"Although we struggle financially and do not want our electricity bills to become more expensive, we have to consider cost in time and money of power outages."*
- *"I'm happy with current reliability of AusNet but happy to pay little more to make it more reliable."*
- *"I don't believe we need to be reducing the amount of outages, maybe just preparing people for it better."*
- *"With an increased need for electricity in 2031…I think that some more investment can be made to make sure that services remain on for customers."*
- *"With people working from home, reliable electricity is very important."*
- *"2031 is eight years away, in that time I expect significant advances in tech and ability to repair issues faster or avoid them altogether."*

How should the cost of achieving this outcome be shared and why?

- Responses were mixed. Some favoured sharing costs – citing reasons including the possibility of **affording more improvements if more paid** and that we should all share the cost to **make it easier for those who can't afford to pay more**.
- Some who said that people who benefit more should pay more suggested a **needs-based approach** e.g. pay more if you use more or are more dependent on electricity (e.g. people working from home); and that the **amount paid/incurred should be adjusted for location**.

What customers said

- *"Cost should be shared across all customers, regardless of where you live."*
- *"Everyone paying a little will go a longer way to achieving outcomes than placing the burden of cost onto just a few."*
- *"Customers whose reliability is improving should pay more or for heavy users."*
- *"Simply because less impact is felt by those who struggle financially if the cost is shared. If we had a greater income, I would be happy to share cost to make it easier for others."*
- *"I am 50/50. I understand customers need to wear some of the cost. I also feel that people benefiting more should maybe pay a portion more. Is this something that AusNet etc could subsidise or bear some of?"*
- *"It should be shared on the basis of cost incurring geography."*

How did residential customers (online) respond to questions about enabling customers to charge EVs?

What outcomes should the network deliver in 2031 and why?

- About a third (32%) of residential customers prefer to **incur less cost** (lower service levels than available today) because **they don't own EVs and don't plan to in future** – reasons cited include not being able to afford an EV, the environmental impact of EVs, not trusting the technology in EVs, expecting EVs to be "a phase that disappears in time", and not wanting to "subsidise others' personal choice".
- Most said they'd be willing to **incur more costs** to enable charging, reasoning that the network will have to **cope with more EVs in future**, that **transport is essential**, and that **flexibility** i.e. the ability to charge when we need will become more important.

What customers said

- *"Cars are a personal choice. Electricity customers shouldn't have to subsidise others personal choice. It shouldn't be a cost born by everyone."*
- *"I really don't care for electric cars I dislike the whole concept."*
- *"I don't agree with electric cars. Not good for the environment in the long run. Battery manufacturing and disposal not beneficial."*
- *"'This would be handy and more efficient for people to charge their cars more effectively. $40 over a year is not much per each bill cycle."*
- *"With a 400% increase in demand, it's fair that there will be extra costs. $40 isn't a lot to have 'fast & flexible' supply. Let's not forget the government's terrible roll out of the NBN which is already outdated."*

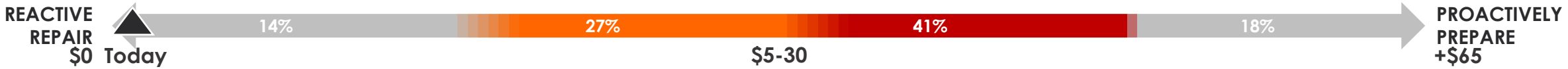
How should the cost of achieving this outcome be shared and why?

- Almost all customers suggested EV owners should pay to enable fast and flexible charging suggesting that EVs are a personal choice and are not "an essential item".
- Some think that the government should be paying or provide subsidies to make EVs more affordable.

What customers said

- *"Cost of charging EV cars should be put to people who purchase EVs only. These are not practicable for all and are non-essential item. I live in a regional town with no charging points."*
- *"I believe the added cost should be borne by the individual customers. EVs are a personal choice to get, and compared to the ongoing fuel costs this is only a small cost."*
- *"Why should I pay more on my bill (very likely) when I won't use it. They [EV users] should have savings anyway as won't be using petrol."*
- *"Everyone should contribute but customers with EV pay a greater %."*
- *"Gov't should be paying for this cost."*

How did residential customers (online) respond to questions about improving resilience to extreme weather?



What outcomes should the network deliver in 2031 and why?

- Customers **favoured greater investment to proactively prepare the network to cope with extreme weather events**, citing reasons including the likelihood of experiencing such events more frequently and the substantial costs of repair/restoration.
- Many reflected on **the importance of ensuring repairs and replacements were made for the long term** i.e. not replacing like for like e.g. moving infrastructure underground, concrete poles and creating mini grids.
- Some said that ensuring resilience was **especially important for people living in rural/isolated areas.**
- A minority preferred reactive repairs saying that **even the most significant improvements were not a guarantee against disruptions.**

What customers said

- *"Move away from being completely reactive. Move power underground if damaged by storms (where practical) don't replace same for same. Think longevity."*
- *"The climate is already showing a more varied swing, it will be a cost that everyone will have to cover, there is no escape."*
- *"Definitely need to up the repair times, but not just repair but make better."*
- *"I can expect a little cost to help out with these uncertain circumstances and moving with the times."*
- *"Because there is still not guarantee by paying $65 it will not happen."*
- *"I live in a regional area, isolated, so the stakes for me are higher. Proactive is always better than reactive and as an insurance policy, I'd be willing to pay extra."*

How should the cost of achieving this outcome be shared and why?

- A little over half say that all customers should share costs as weather affects all in different ways; extreme weather **events are unpredictable**; and because the alternative **unfairly disadvantages people in regional and remote areas** (fewer people to share the cost). Sharing the cost among all customers will keep costs to a minimum.
- Some said that **those benefiting from repairs should pay**: "Why should we be paying for their repairs? If our car breaks we pay for it and fix it. We don't get anyone else to pay for it".
- Others feel AusNet and/or the government should cover the majority of costs because **they are "ultimately responsible for their own network providing this service"**.

What customers said

- *"By everyone paying a small amount it is a type of insurance for your own personal area, extreme weather is unpredictable, and it is likely the hardest hit customers won't be able to afford any extra."*
- *"I don't think the end user should be charged for this. I think this is something that should be worked out by the distributor and government."*
- *"Government should take more of costing today and should be apportioned for longer years."*
- *"AusNet should foot the major bills because it is their infrastructure."*
- *"All are at risk of extreme weather at some point. Energy providers should pay a percentage of profit on proactive work to energy infrastructure."*

How did residential customers (online) respond to questions about enabling solar PV export?

What outcomes should the network deliver in 2031 and why?

- Most customers **(77%) are willing to incur more costs to enable solar exports,** reasoning that solar is the future; improvements will encourage greater uptake, benefit the environment, give customers more control and reduce bills.
- Some are not fully aware of how solar works while others are **concerned about the quality of equipment and installations:** "May be cost effective but still in early stages and can be dangerous (i.e. faults/fires) dodgy installations".

What customers said

- *"Because I believe solar panels are the future."*
- *"More solar on roofs means more energy but I do have my gripes with solar."*
- *"Not everyone can have solar, too much shade. If I can't substantially reduce my power bills, then paying to have the infrastructure installed is less appealing. I shouldn't have to pay more to allow others to have cheaper electricity than I do."*
- *"There is a big push to turn to solar, we might as well pay to have it fully operational. People have already invested a lot into the systems."*
- *"If a little more can be sent back into the grid it might promote more people to get solar panels. We want to promote this type of personal investment."*

How should the cost of achieving this outcome be shared and why?

- Many customers agree that everyone should share the costs, as **all will benefit** e.g. improved resilience, and this will encourage solar panel use.
- For some, support for improved outcomes is **contingent on whether they will see a lowered electricity bill.**
- Some believe that the **customers with solar panels have already invested** a great deal for purchase and installation and should not be further burdened to be able to export solar.

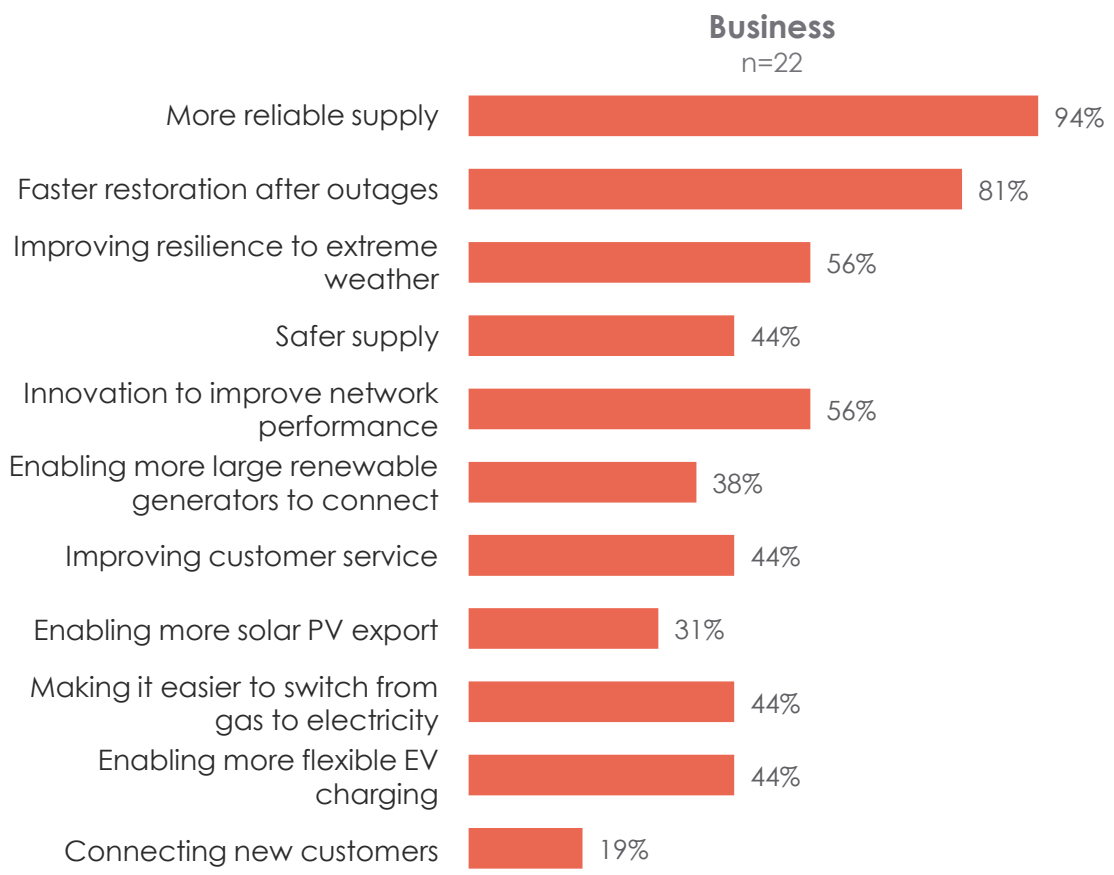
What customers said

- *"Shared costs by all especially if excess energy is shared."*
- *"Spreading the cost will encourage more homes and businesses to opt for solar power reducing reliance of fossil fuels."*
- *"If there was a one-off cost that lowered my bill, I'd be willing to pay."*
- *"'Because if it feeds back into the grid and ultimately reduces costs for everyone that would be worth it."*
- *"AusNet needs to invest in making it safe to feed unused energy back into the infrastructure."*
- *"Make it easy and affordable for customers to feed energy back into the grid."*
- *"Customer has already paid enormously for panels etc."*

03
Business customers

Summary of feedback from online workshop with business customers

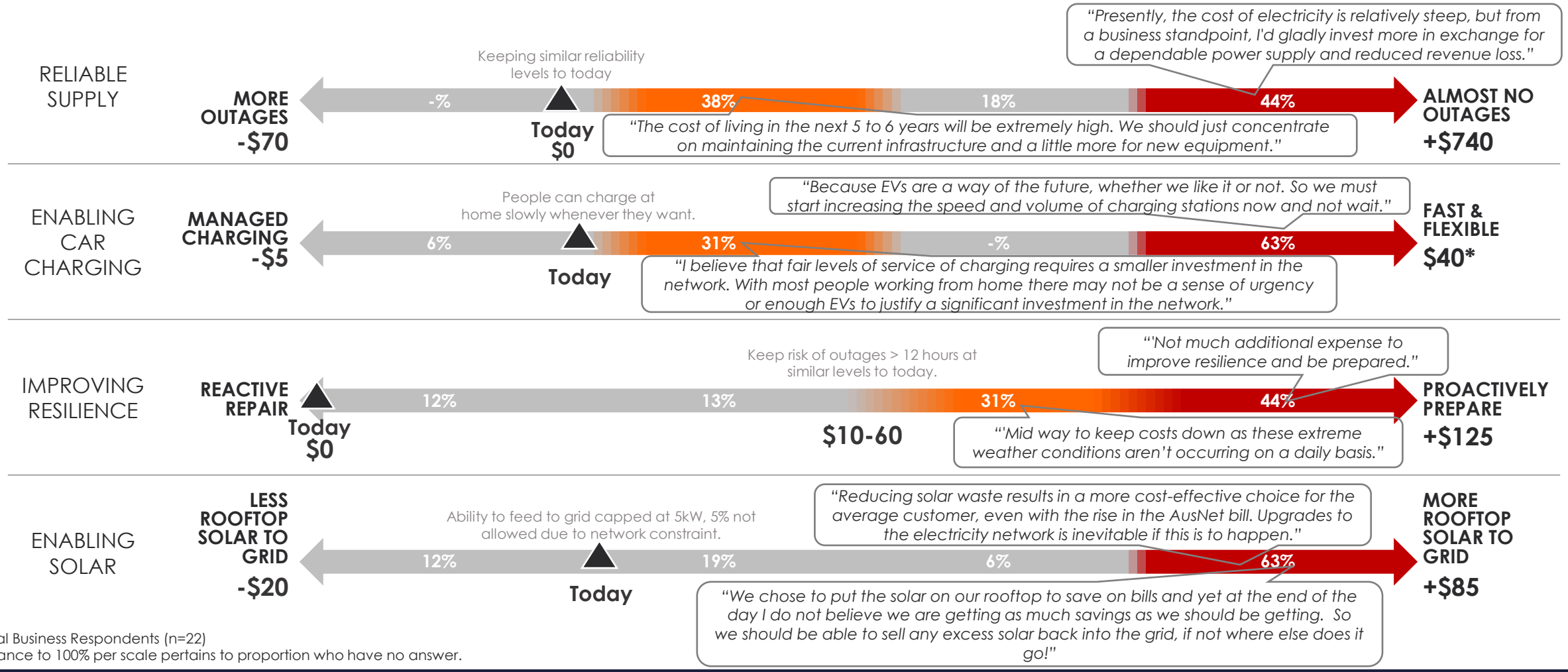
Prioritisation exercise



Overall workshop observations

- Business customers were **in favour of improving the network for all four outcomes** discussed during the workshop. They were most supportive of improvements that enabled fast and flexible charging of EVs and more solar exports.
- All business customers **supported retaining or improving reliability** of supply, citing the cost of outages i.e. lost revenue as a key reason for their support. They are also concerned about the costs of improvement preferring to incur lower costs for less improvement.
- Most business customers supported improving resilience to extreme weather citing the **need to prepare for the expected increase in frequency of such events**, and to thereby minimise future disruptions to business.
- Customers **favoured sharing the costs of improving outcomes for three of the four priorities** considered in the workshop. The exception was improvements to enable fast and flexible charging of EVs – almost all customers said that beneficiaries should pay when it comes to EVs.
- Customers also felt that **government and AusNet had a part to play in financing improvements** to the network; reasoning that some improvements are required as a result of government policies and/or that AusNet stands to benefit from improved infrastructure and should contribute.

Business customers supported improved outcomes in all four priorities



Total Business Respondents (n=22)
Balance to 100% per scale pertains to proportion who have no answer.

How did business customers (online) respond to questions about reliable supply?

What outcomes should the network deliver in 2031 and why?

- All business customers **(100%) preferred at least retaining levels of reliability with most supporting improvement.**
- **Customers recognise the importance of reliable electricity supply** for their businesses citing **potential lost revenue** as a driver.
- **Cost is a significant concern** among business customers. They are conscious of the already high price of electricity and high cost of living. While all are inclined to pay more, most (54%) were in favour of paying less than the $740.

What customers said

- *"AusNet should invest in new technologies that can help to improve the efficiency and reliability."*
- *"Presently, the cost of electricity is relatively steep, but from a business standpoint, I'd gladly invest more in exchange for a dependable power supply and reduced revenue loss."*
- *"Reliability should always keep improving, but with the high rise of cost of living, I didn't drag the dot too far as don't want the bills to increase too."*
- *"'The cost of living in the next five to six years will be extremely high. We should just concentrate on maintaining the current infrastructure and a little more for new equipment."*

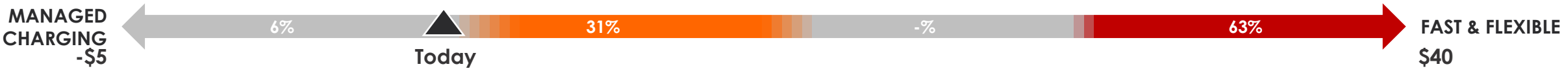
How should the cost of achieving this outcome be shared and why?

- Customers indicated a preference for **all customers to share the cost** of improvement with businesses contributing more than households.
- Some said that those who use more e.g. larger businesses, would benefit the most; and should therefore pay more.
- Some suggested AusNet should cover costs.

What customers said

- *"Shared 33/67 household/business."*
- *"It should be made as a percentage of your usage regardless of type of customer."*
- *"A fair and equitable system perhaps slightly more expensive for rural and remote customers."*
- *"Every customer benefits from improved reliability but the ones that benefit the most should pay an additional amount."*
- *"Larger businesses have much more money than personal account holders do, and are a bigger user of power."*

How did business customers (online) respond to questions about enabling customers to charge EVs?



What outcomes should the network deliver in 2031 and why?

- More than half (63%) see the **value in preparing for increased use of electric vehicles** in the future, supporting significant improvements to the network.
- Some (31%) support improving the network but are **not keen to pay much more.** Reasons offered for this include that customers already pay for charging equipment, and the changing nature of work i.e. more work from home.
- Some suggested that enabling fast and reliable charging will encourage/incentivise the **switch from petrol vehicles**.

What customers said

- *"The demand for fast charging ports will be much greater in the future."*
- *"I still need to pay a lot for car charging equipment."*
- *"I believe that fair levels of service of charging requires a smaller investment in the network; With most people working from home there may not be a sense of urgency or enough EVs to justify a significant investment in the network."*
- *"For us to switch from petrol to electric charging we shouldn't be disadvantaged and limited to how and when we charge otherwise there is no incentive to switch as petrol is much quicker and convenient to use."*
- *"If AusNet want consumers to convert to electric vehicles, they need to ensure its reliability and ease of use."*

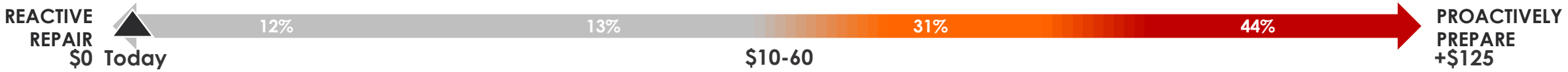
How should the cost of achieving this outcome be shared and why?

- Almost all agreed that **users of electric vehicles should pay**. In their view, it is unfair for non-users to pay for something they are not or have no intention of using.

What customers said

- *"Users should pay."*
- *"Everyone shares the costs based on usage. By having a cost for everyone, this will also incentivise people to get an EV."*
- *"Electric Vehicle users should pay the cost, non-users shouldn't have to pay for a service they don't use."*
- *"Unfair to pay if don't use electric vehicle."*
- *"Not everyone will own electric vehicles, so not everyone should have to pay for something they are not using."*
- *"Not fair on people who already pay taxes to pay extra for something they don't use."*

How did business customers (online) respond to questions about improving resilience to extreme weather?



What outcomes should the network deliver in 2031 and why?

- Majority of business customers **support proactively preparing for extreme weather events** citing the increased frequency of these events and the need to minimise disruption (and lost revenue), in future.
- Some were **reluctant to incur the maximum estimated cost (+$125)** of proactive preparation because 1) they are still not assured of completely having no outages, and 2) outages are rarely happening and extreme weather conditions are not a daily occurrence.

What customers said

- *"Preparation prevents severity if an event happens."*
- *"A more resilient electricity distribution network that is able to withstand the impacts of extreme weather events such as heatwaves, bushfires, storms, and floods."*
- *"Mid way to keep costs down as these extreme weather conditions aren't occurring on a daily basis."*
- *"I'm not confident in proactive preparation working. I wouldn't want to invest $125 per year and still experience the outages."*
- *"I don't think extreme whether outages are that common so no need to pay extra. Cost of living needs to come down, not up."*

How should the cost of achieving this outcome be shared and why?

- **Most supported cost socialisation** saying that all are impacted by extreme weather and will be more impacted in future.
- A minority suggested **cost sharing should depend on need** – most affected communities or regional areas pay more vs. others.
- Some suggested that the **government and/or AusNet should pay** to improve the network as it is their infrastructure.

What customers said

- *"All AusNet customers share costs for proactive preparation and/or reactive repair."*
- *"A portion of the cost to everyone but then only communities affected should pay higher amount for preparation and repairs."*
- *"A slight increase for urban customers. A greater cost for rural/regional areas."*
- *"Extreme conditions are unpredictable and can happen anywhere."*
- *"I believe this effects all of us whether it be directly or indirectly. Indirectly being family/friends live in the affected areas or the price increase in fruit and vegetables due to transport can't get through. Directly it affects me every year living in an area that suffers with extreme weather."*

How did business customers (online) respond to questions about enabling solar PV export?

What outcomes should the network deliver in 2031 and why?

- Most customers **favoured significantly improving the network** to enable more solar exports. Reasons for this included not wasting electricity generated by solar panels, reducing costs, reducing reliance on fossil fuels and benefitting the planet.

What customers said

- *"We should be maximising as much free energy as we can get. It is a waste to have unused solar energy, and we need to get better at utilising every last watt that we can get from the sun."*
- *"Will reduce individual bills."*
- *"If there's a saving to be made then why not?"*
- *"So we are less reliant on the fossil fuel industry."*
- *"We chose to put the solar on our rooftop to save on bills and yet at the end of the day I do not believe we are getting as much savings as we should be getting. So we should be able to sell any excess solar back into the grid, if not where else does it go?"*

How should the cost of achieving this outcome be shared and why?

- Customers were **split between cost socialisation and beneficiaries pay**. Some also suggested **AusNet and/or the government should pay.**
- More customers appeared to favour the sharing of costs among all with some advocating the need for **further consideration e.g. for tenants.**
- Reasons for suggesting that beneficiaries should pay include that **it was their choice** to generate and export.
- Those suggesting that government should foot the bill reasoned that it was **government policies that lead to increased uptake** of solar and that it was up to government to incentivise more solar generation.

What customers said

- *"No extra cost as it costs to have the solar panels."*
- *"Anyone should be able to feed in at no extra cost."*
- *"Should generate as much solar energy as we can but don't think any additional expense should be incurred to feed energy back."*
- *"All AusNet customers share costs for enabling solar to be shared (or savings from solar not being shared)."*
- *"Costs should be shared between those able to send excess to the grid as they are benefiting."*
- *"No incentive to non-solar users."*
- *"Should be covered by AusNet."*

Appendix

- Recruitment methodology
- Sample details for residential participants
- Sample details for business participants
- Feedback from participants

Recruitment methodology

We spoke to 117 customers in five workshops

SenateSHJ worked with a professional research recruitment agency, Focus People, to source participants. Most were recruited from their research panel, but a small selection were sourced through AusNet's Research and Engagement Panel network.

Residential (95 customers)

Morwell

- Tuesday 10 October
- 20 customers
- Morwell Bowls Club

Epping

- Wednesday 11 October
- 24 customers
- Epping RSL

Wangaratta

- Thursday 12 October
- 27 customers
- Wangaratta Performing Arts and Convention Centre

Online

- Tuesday 17 October
- 24 customers
- Hosted on Zoom

Business (22 customers)

Online

- Wednesday 18 October
- 22 customers
- Hosted on Zoom

Gender	Total sample (n=95)
Male	**40%**
Female	**60%**

Age	Total sample (n=95)
Under 30	**9%**
30-39	**38%**
40-49	**28%**
50-59	**15%**
60+	**10%**

Location	Total sample (n=95)
Metropolitan	**37%**
Regional	**43%**
Rural/Remote	**20%**

- Self-employed – 57%
- 1 to 4 staff – 22%
- 5 to 19 staff – 13%
- 20+ staff – 9%

- Metro – 65%
- Regional – 31%
- Rural/Remote – 4%

Summary of residential workshop participants

A total of 95 residential customers attended these workshops. The number of participants in each were:

- 20 in Morwell
- 24 in Epping
- 27 in Wangaratta
- 24 in the online session.

The sample included a mix by gender (60% female, 40% male), age (47% aged under 40 and 53% aged 40+) and location (37% metropolitan, 43% regional and 20% rural/remote).

32% held one or more concessions, some had a disability (12%), health condition (12%), spoke a language other than English at home (13%) and three participants were Aboriginal/Torres Strait Islander.

We sought a mix of family and work situations, home ownership status and gross household income.

Looking at participants' electricity and gas consumption, we found over a third (38%) have solar panels on the roof of their home, most use gas (92%) but few drive electric vehicles (4%).

Electricity usage typically increases as the day progresses and is heaviest in the late afternoon through to evenings. Attitudinally we heard that the majority actively try to reduce household energy consumption and think it's important to move towards sustainable energy sources to reduce our impact on the environment, however only some (20%) intend to stop using gas in future.

A more detailed breakdown of participants is provided in the next section.

Summary of business workshop participants

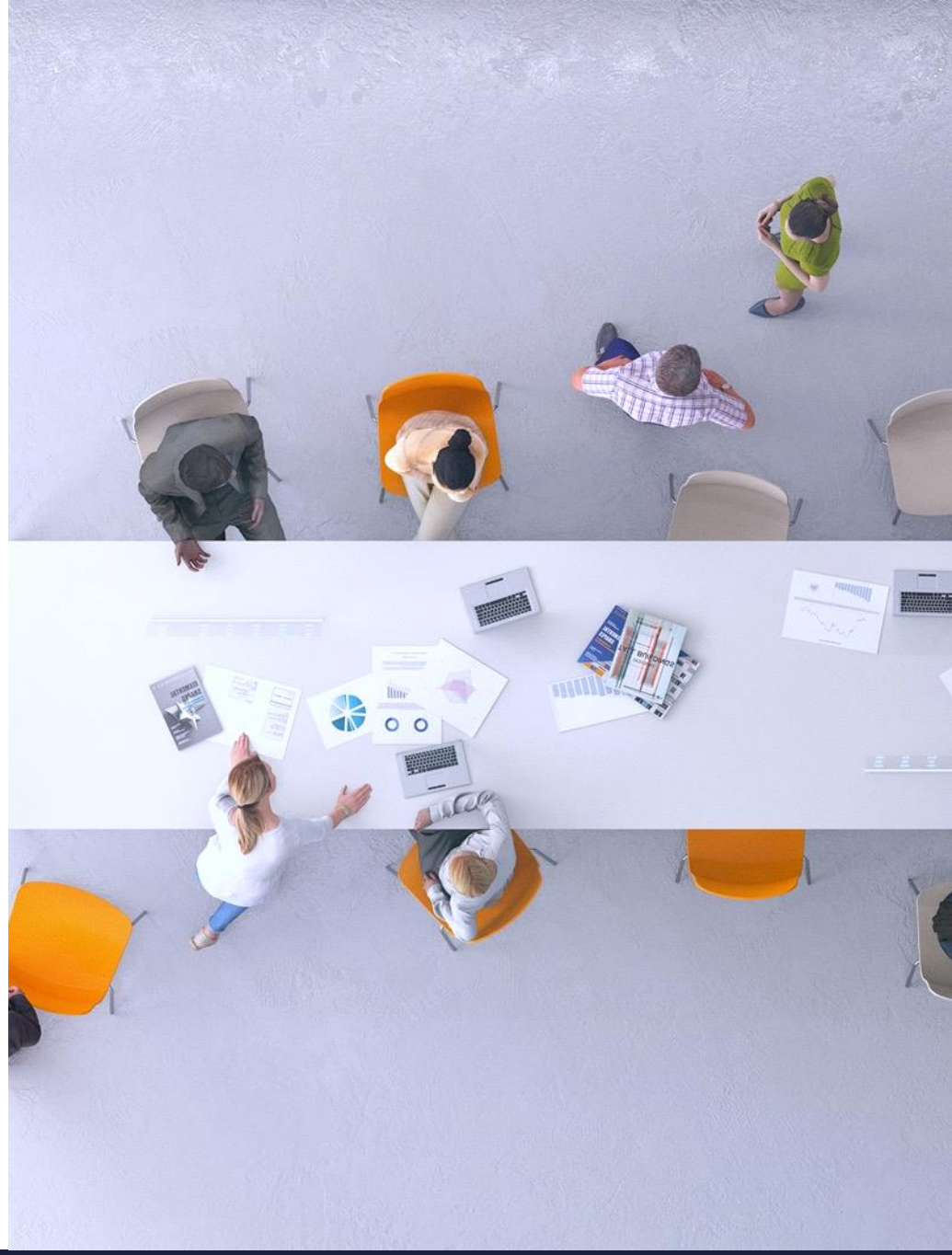
22 business owners/operators attended the online session. This group consisted of:

- A mix of self-employed (57%), and businesses who employ staff (21% with 1-4 staff, 13% with 5-19 staff and 9% with 20+ staff), operating across a range of industries/sectors.
- A spread by gender (52% female, 48% male), age (61% under 50 and 39% aged 50+) and location (65% metro, 31% regional and 4% rural/remote).
- People with different levels of education, with 52% having a tertiary education. A little under half (44%) are still paying their mortgage, while 30% own their home outright.
- Businesses who mostly rely on electricity for their business operations (65% use electricity exclusively). Some have solar panels on the roof of their business premises (43%), and about two own/operate an electric vehicle on behalf of the business.

In recruiting data it was noted that:

- Businesses' electricity use is highest during mid-morning to noon and wanes throughout the rest of the day.
- Owners/operators try to reduce business energy consumption and think it's important to move to sustainable energy sources to reduce the impact on the environment.
- A third (35%) of businesses who are currently using gas to operate appliances/ machinery, intend to stop using it in future.

A more detailed breakdown of participants is provided in the Appendix.



Sample details for residential participants

A total of 95 residents attended the workshops in Round 2
- 20 in Morwell
- 24 in Epping
- 27 in Wangaratta
- 24 in the online session

The following slides are an overview of the information collected during recruitment.

Gender, age and location

Gender	Total sample (n=95)
Male	40%
Female	60%

Age	Total sample (n=95)
Under 30	9%
30-39	38%
40-49	28%
50-59	15%
60+	10%

Location	Total sample (n=95)
Metropolitan	37%
Regional	43%
Rural / Remote	20%

Notes:
Rounding occurs
Total sample n=95

Concessions and suburb

Concessions	Total sample* (n=95)
Holds one or more concessions	32%
Speaks a language other than English at home	13%
Has a disability	12%
Has a chronic health condition	12%
Aboriginal and/or Torres Strait Islander background	3%
None of the above	48%
Prefer not to say	3%

*** Note**: Multiple responses allowed

Main suburbs	Total sample (n=95)
Wangaratta	22%
Epping	13%
Traralgon	8%
Morwell	7%
Mernda	6%
Croydon	3%

Other suburbs (2% or less)		
Baranduda	Gormandale	Newborough
Bairnsdale	Hazelwood North	Nicholson
Bayswater	Healesville	Ringwood East
Bayswater north	Kilmore	Sale
Berwick	Kilsyth	Seaview
Boweya	Laceby	Tawonga South
Broadford	Lucknow	The Basin
Churchill	Maffra	Thomastown
Doreen	Mickleham	Trafalgar
Euroa	Moe	Wantirna South
Ferntree Gully	Mooroolbark	Warragul
Glenrowan	Narre Warren	Wollert

Notes:
Rounding occurs
Total sample n=95

Household situation, gross household income, work status and home ownership status

Household situation	Total sample (n=95)
Couple with children at home	52%
Living alone	13%
Single parent with children at home	9%
Couple with no children	10%
Couple whose children have left home	10%
Living with housemates/other family	5%
Prefer not to say	1%

Occupation	Total sample (n=95)
Employed full-time	47%
Self-employed	8%
Employed part-time/casual	18%
Engaged in home duties	7%
Not employed at the moment	7%
Retired/Semi retired	10%
Student	2%
Prefer not to say	1%

Gross Household Income (before tax)	Total sample (n=95)
Less than $50,000	20%
$50,000 to $99,999	34%
$100,000 to $149,999	24%
$150,000 to $199,999	13%
$200,000 +	5%
Prefer not to say	4%

Home ownership status	Total sample (n=95)
Have a mortgage (still paying it off)	51%
Rent	29%
Own the home outright (no mortgage)	19%
Prefer not to say	1%

Notes: Rounding occurs. Total sample n=95

Electricity and gas behaviour and consumption

Role in the decision-making and administration of your electricity supply	Total sample (n=95)
I am the main person in my household	80%
I share the decision-making and administration with others in my household	20%

Have solar panels on the roof of your home?	Total sample (n=95)
Yes	38%
No	62%

Drive an electric vehicle	Total sample (n=95)
Yes	4%
No	96%

Use gas in your household for heating, cooking, etc.	Total sample (n=95)
Yes, we use mains gas	82%
Yes, we use bottled gas	10%
No, we use electricity only	8%

Note: Multiple responses allowed

Notes:
Rounding occurs
Total sample n=95

Electricity usage and attitudes

Now thinking about your household electricity usage on an average weekday, can you please indicate whether you use a lot, some (but not a lot), only a little bit/none at the following times throughout the day?

	A lot	Some but not a lot	Only a little bit/none
12am-6am	7%	31%	62%
6am-9am	20%	60%	20%
9am-12pm	19%	56%	25%
12pm-3pm	22%	50%	28%
3pm-6pm	56%	39%	5%
6pm-9pm	69%	24%	7%
9pm-12am	25%	50%	25%

Using the scale shown, please indicate your level of agreement or disagreement with the following statements relating to household electricity use?

	Agree	Neither agree nor disagree	Disagree	N/A
I actively try to reduce my household's energy consumption	74%	22%	4%	-
I feel it is important to move to sustainable energy sources to reduce our impact on the environment	72%	26%	2%	-
I intend to stop using gas and use electricity only	20%	36%	33%	11%

Notes:
Rounding occurs
Total sample n=95

Sample details for business participants

A total of 22 business owners/operators attended an online workshop in Round 2.

The following slides are an overview of the information collected during recruitment.

Business operation

Working situation	Total sample (n=22)
I am self-employed and my business does not have any full-time or part-time employees	57%
I own or part-own a business with between 1 and 4 employees (including me and any business partner/s)	21%
I own or part-own a business with between 5 and 19 employees (including me or any business partner/s)	13%
I own or part-own a business with between 20 or more employees (including me or any business partner/s)	9%

Type of business	Total sample (n=22)
Beauty Services	4%
Bookkeeper	4%
Coffee Wholesale	4%
Computer Training and Hardware	4%
Construction	4%
E-Commerce - Selling Gifts Online	4%
Fruit Shop	4%
Furniture Retail	4%
Graphic Design Services	4%
Hospitality	4%
Online Retail	4%
Pet Food Manufacturing	4%
Professional Administration Services & Online Management	4%
Retail / E-Commerce	4%
Specialised Cleaning services	4%
Wholesale	4%
Community service	4%
Myotherapist	4%
NDIS Disability Support Provider	4%
Recycling	4%
Residential Home for People with a Disability	4%
Service Appliances	4%
Therapy	4%

Notes:
Rounding occurs
Total sample n=22

Gender, age and location

Gender	Total sample (n=22)
Male	48%
Female	52%

Age	Total sample (n=22)
Under 40	26%
40-49	35%
50-59	30%
60+	9%

Location	Total sample (n=22)
Metropolitan	65%
Regional	31%
Rural / Remote	4%

Notes:
Rounding occurs
Total sample n=22

Education and home ownership status

Education	Total sample (n=22)
Tertiary education	52%
Secondary schooling completed	17%
Secondary schooling incomplete	9%
Vocational certificate	9%
Trade qualification	13%

Home ownership status	Total sample (n=22)
Have a mortgage (still paying it off)	44%
Own the home outright (no mortgage)	30%
Rent	22%
Live with parents	4%

Notes:
Rounding occurs
Total sample n=22

Electricity and gas behaviour and consumption

Role in the decision-making and administration of your business electricity supply	Total sample (n=22)
I am very involved and the main decision-maker in my business	78%
I am quite involved in decision-making and administration but share this responsibility with others in the business	22%

Have solar panels on the roof of any of your office/work locations?	Total sample (n=22)
Yes	43%
No	57%

Does your business own and operate any electric vehicles	Total sample (n=22)
Yes	9%
No	91%

Use gas to operate various appliances / machinery within your business?	Total sample (n=22)
Yes, we use mains gas	22%
Yes, we use bottled gas	13%
No, we use electricity only	65%

Note: Multiple responses allowed

Notes:
Rounding occurs
Total sample n=22

Electricity usage and attitudes

Now thinking about your business electricity usage on an average work day, can you please indicate whether you use a lot, some (but not a lot), only a little bit/none at the following times throughout the day?

	A lot	Some but not a lot	Only a little bit/none
12am-6am	4%	26%	70%
6am-9am	17%	48%	35%
9am-12pm	57%	30%	13%
12pm-3pm	52%	35%	13%
3pm-6pm	35%	48%	17%
6pm-9pm	22%	26%	52%
9pm-12am	4%	35%	61%

Using the scale shown, please indicate your level of agreement or disagreement with the following statements relating to your business's electricity use?

	Agree	Neither agree nor disagree	Disagree	N/A
Our business actively tries to reduce its energy consumption	70%	26%	4%	-
I feel it is important to move to sustainable energy sources to reduce our businesses impact on the environment	70%	26%	-	4%
Our business intends to stop using gas and use electricity only	35%	26%	26%	13%

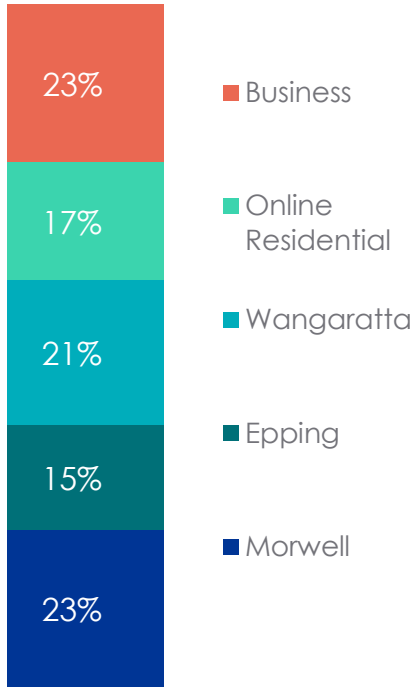
Notes:
Rounding occurs
Total sample n=22

Feedback on workshops from participants

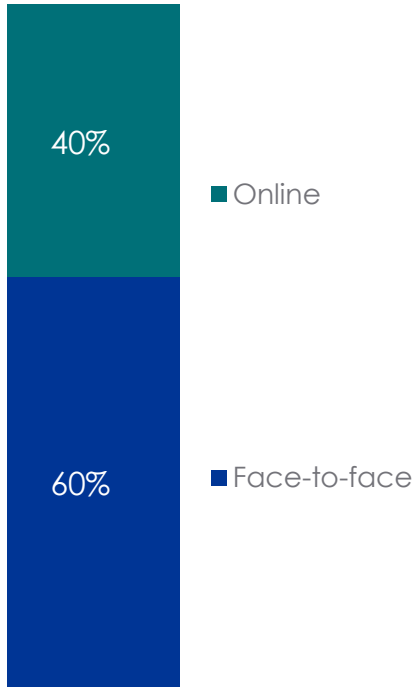
Participants' feedback about workshops

- The majority of respondents are quite happy and appreciative having been able to participate in the workshops, crediting good facilitation and interesting topics presented to them. They also found sessions insightful, informative, and enjoyable.
- They especially liked the breakout groups, which served as a very good venue to voice-out their thoughts and opinions.
- Minor improvement points related to creating more variation, allowing time for deeper discussion and making sure all voices are able to be heard.

Workshop attended



Workshop mode



Overall feedback

ONLINE (n=21)

81% Happy

"It was good, well run, interesting topic and relevant to me, a consumer. I enjoyed the break out rooms."

"It was a great session. The facilitators were clear, helpful and very professional. It was helpful having some AusNet gals on line also to chime in where needed."

19% Lukewarm

"Interesting, but the forms and conversation after with a summary from leader, could be a bit frustrating and repetitious."

"The only potential concern might be the limited time available for discussing the final topic."

FACE-TO-FACE (n=31)

87% Happy

"Interesting. I found the various participant's views quite informative and some quite entertaining."

"Very informative. Allowed myself to have a say. Interactive and fun."

"Informative, interesting and thought provoking."

13% Lukewarm

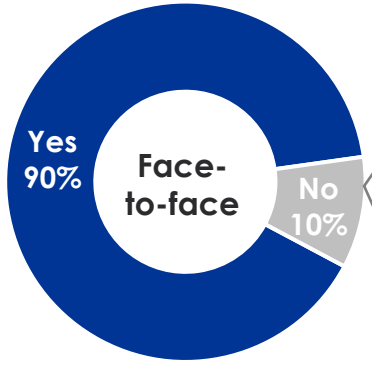
"The questions had multiple choice answers that appeared to suit the company's agenda, but we were able to give alternative answers."

"Some of the personalities are a bit 'strong' and these unfortunately assume any leadership or 'captain' roles."

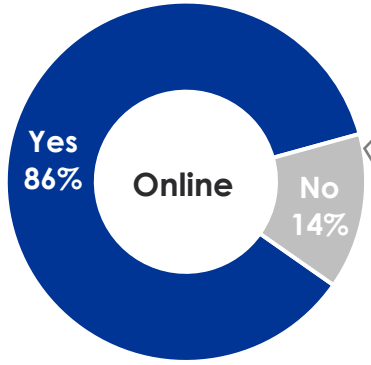
Total sample who responded: n=52

Did the discussion groups allow you to contribute as you would have liked to?

- Almost all were able to contribute in the way that they would have liked.
- However, a handful of respondents who were in face-to-face sessions found their 'captains' leading the conversation and they were not able to represent their views well.
- Online respondents' concerns were more about the limited time they had for deeper discussion.



- *"In the main I was quite happy to contribute in the format as organised. However, I would have liked to see more opportunity for participants to offer their views based on their own priorities on the subject. Maybe a segment where participants were invited to suggest their own questions to put to the groups?"*
- *"Everyone was open to hearing my opinions."*
- *"Team Captain not representing the views of the group, rather just sharing her own views. It's difficult to say how this could be managed, maybe reiterating the shared values of the group throughout, I think some participants forgot the value of thinking of others when responding."*



- *"I felt that in the smaller groups it was easy to share thoughts and ideas. I was pleased that they reminded the group that they were looking for individual opinions and not a consensus on the topics."*
- *"Skip the group leader summary, you have that info you can review later. The participants don't really need to hear what other groups thought when the project is so time pressured. It frees up some space and allows more in-depth discussion."*

Total Face-to-face: n=31

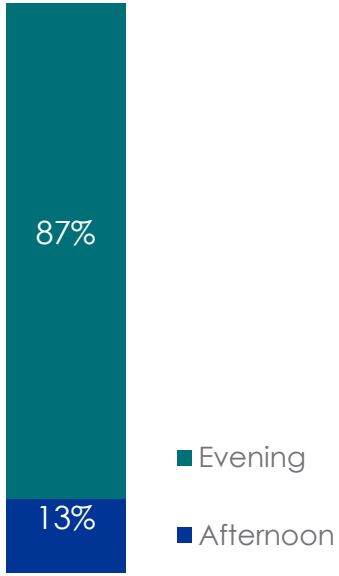
Total Online: n=21

Other feedback on the workshop

- The majority of participants prefer the workshop sessions in the early evening, as occurred in Round 2.
- Face-to-face respondents commended the venue, the facilitators, and the break-out groups as positives.
- Online participants mentioned disengaged people during the sessions, and more time for some sections of the session.

Face-to-face

Time preference



General comments: + or -

"The facilitators are wonderful and the new venue in Hazelwood Road was better than the original location."

"The smaller tables are much better. It allows everyone to have a voice, not just those who naturally have the ability to speak in big groups."

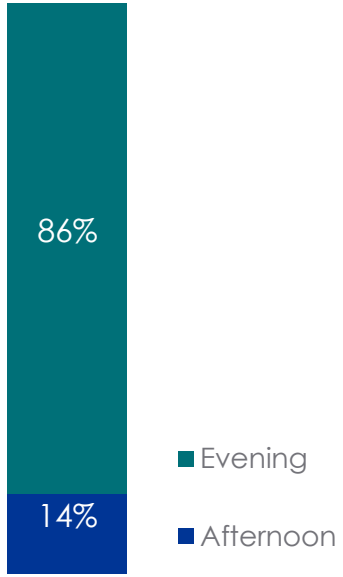
"Facilitators do a great job at managing and prompting discussion."

"I found it a little difficult giving my opinion from other people's situations, before discussing them with the rest of the table first."

Total Face-to-face: n=31

Online

Time preference



General comments: + or -

"I felt that in the smaller groups it was easy to share thoughts and ideas. I was pleased that they reminded the group that they were looking for individual opinions and not a consensus on the topics."

"It could be done in less than three hours and needs a decent break in the middle to at least grab a snack, drink and use the bathroom."

"Feedback would be: a bit more time for interaction and introduction of participants."

"I believe that one of the participants was disengaged, provided minimal input and seemed to be watching other screens during the session which was disappointing. He was frequently required to be prompted in groups to share his views."

Total Online: n=21

Thank you.

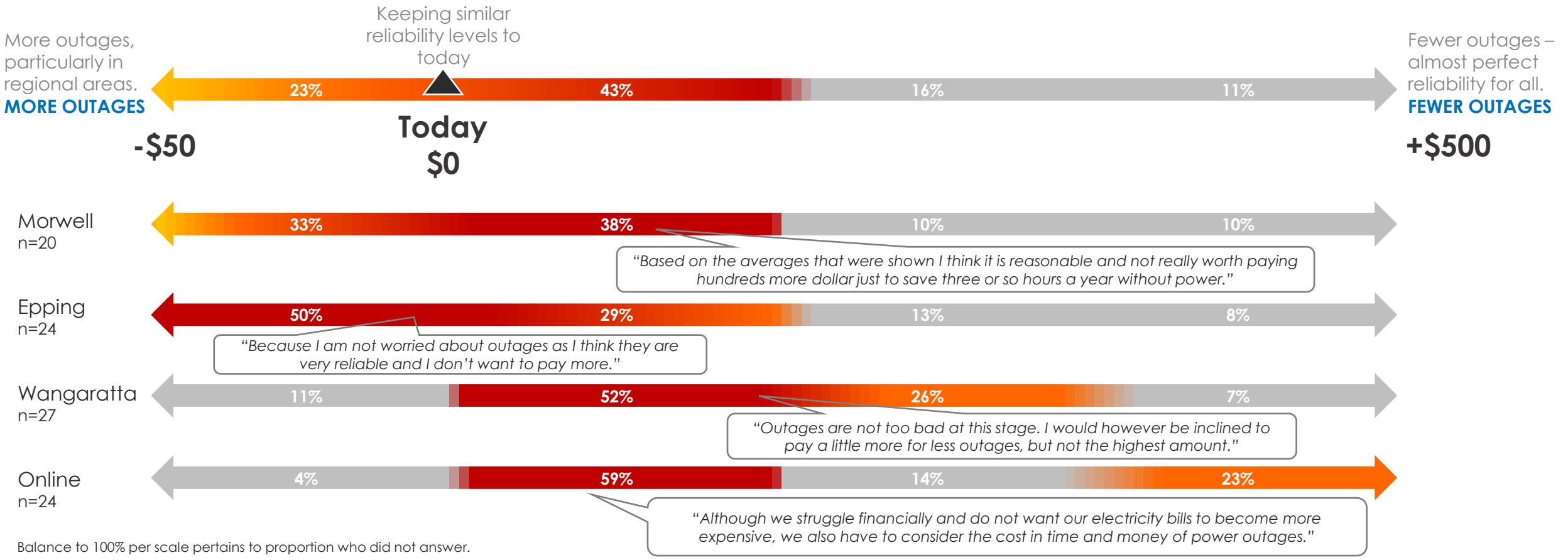
To discuss this further, please contact either of the facilitators:

Aravin Stickney – Aravin@kamber.com.au

Jill Calder – Jill@senateshj.com.au

Most residential customers are willing to pay more to improve levels of reliability

- Customers see reliability as one of their top priorities and are willing to pay more to improve this outcome. Most, however, are satisfied with the frequency and duration of outages and are wary of paying too much more for what they believe will be a marginal improvement.
- Customers in Wangaratta and in the online group demonstrated a greater willingness to pay more



Balance to 100% per scale pertains to proportion who did not answer.