Identifying a Customer Service Incentive Scheme Metric

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Research Objectives and Methodology

Program Objectives

Business Objectives

- Identify a CSIS metric that is aligned to the preferences of CitiPower, Powercor and United Energy customers.

Research Objectives

In this report:

- Measure the relative importance that customers place on improvements in CitiPower, Powercor and United Energy's services;
- Determine a hierarchy of the importance of services provided within individual service areas;

In next program (Phase 2):

- Translate customer preferences into metrics which meet the key principles outlined by the AER;
- Validate the chosen CSIS(/s) with customers to ensure they agree for CitiPower Powercor and United Energy to be rewarded / penalised based on their performance.

Our Approach

	Phase 1: Prepare, prioritise and quantify		Phase 2: Workshop and validate	
What	• Drawing on existing knowledge bank of previous research, align on key insights to inform development of hypothesis to be tested in Phase 2 (quantitative research). • Forethought to leverage all relevant past research completed with CitiPower, Powercor and United Energy. • Finalise sampling frame.	• Compare customer preferences for customer service attributes with insights collected in the 2020 CSIS research. • Measure the value that customers place on service improvements to relevant services to be provided by the network.	• Support CitiPower, Powercor and United Energy in developing and aligning on CSIS metrics which meet the key principles outlined by the AER.	• Validate the proposed CSIS metrics to identify the scheme that customers find commensurate to their expectations and preferences.
Outcome	✓ Alignment on service attributes to be quantitatively tested with customers.	✓ Measurement of the value of services provided by the networks to inform the development of CSIS metrics.	✓ Finalised draft CSIS metrics which meet the key principles outlined by the AER and can be feasibly and viably delivered by CitiPower, Powercor and United Energy.	✓ A validated CSIS metrics which is ready to be taken to the Australian Energy Regulator (AER) for approval.

This initial program of research focusses on Phase 1. The key output of these phases is the development of draft metrics to be refined through stakeholder consultation and tested/validated with the market in Phase 2.

Who did we speak to?

How?

15 minute online quantitative study

Data was weighted to include a representative sample of Victorians. Residential and business customers have been weighted according to this. Two weighting protocols were tested. First, a Victoria demographic weight was tested using the Age (18-24, 35-49 and 50+) and Gender (Male and Female) of respondents. The correlation between the target and survey data was found to be 0.997, therefore no weight was required at that stage. Secondly, an overall weight was used to correct for the population of Victoria and the number of SMEs in Victoria. In this instance weighting was applied to weight accordingly to the target.

To ensure data integrity, pur panel partner employs a system of checks including the use of CleanID. CleanID is an industry leading fraud and duplication detection system built to analyse and identify device-level attributes to eliminate known data threats in real time. This solution forms an integral part of our ongoing commitment to providing efficient, reliable, and high-quality data.

Addressable market

- Respondents were 18+ Victorians in the CitiPower, Powercor or United Energy networks who were either the main or joint decision-maker for household, SMB or Commercial and Industrial (C&I) energy.

Sample

	Residential Customers	Small Business Customers	Commercial and Industrial Customers	Total
CitiPower	n=486	n=157	n=16	n=659
Powercor	n=928	n=82	n=4	n=1,014
United Energy	n=748	n=73	n=0	n=821
Total	n=2,162	n=312	n=20*	n=2,494

Notes on sample

- In order to draw statistically robust quantitative insights a minimum sample of n=30 is recommended. Any view of C&I customers represented in this report has been applied from a qualitative lens (n=20). Future engagement with C&I customers (across all networks) is being planned for later this year to ensure the perspective of this customer cohort is captured as part of the Regulatory Reset draft submission.
- As the survey was digital, vulnerable customers with no access to internet or technology were likely not captured. CitiPower, Powercor, and United Energy are taking steps to recruit this sample and develop measures to include them for future research and engagement.

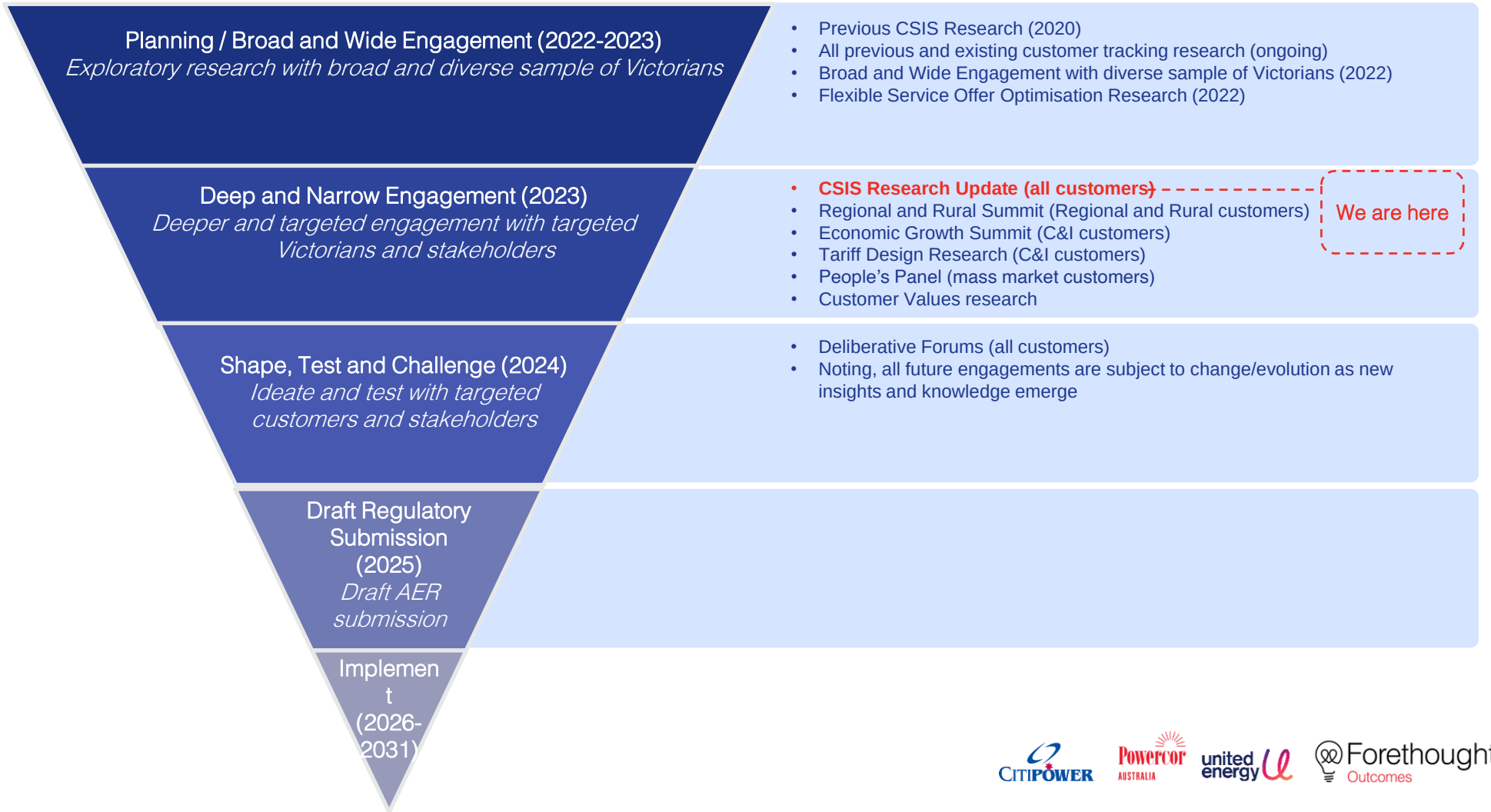
This research builds on existing research and will be critical to informing CitiPower, Powercor and United Energy's AER Regulatory Submission

Significant research has been conducted prior to this program. All previous research has been leveraged in the development of the methodology for this research program as well as the insights contained in this report.

The hypothetical list of service areas prioritised by this research were drafted using:

- Previous research
- Detailed knowledge of the industry context
- Critical input from the CitiPower, Powercor and United Energy team

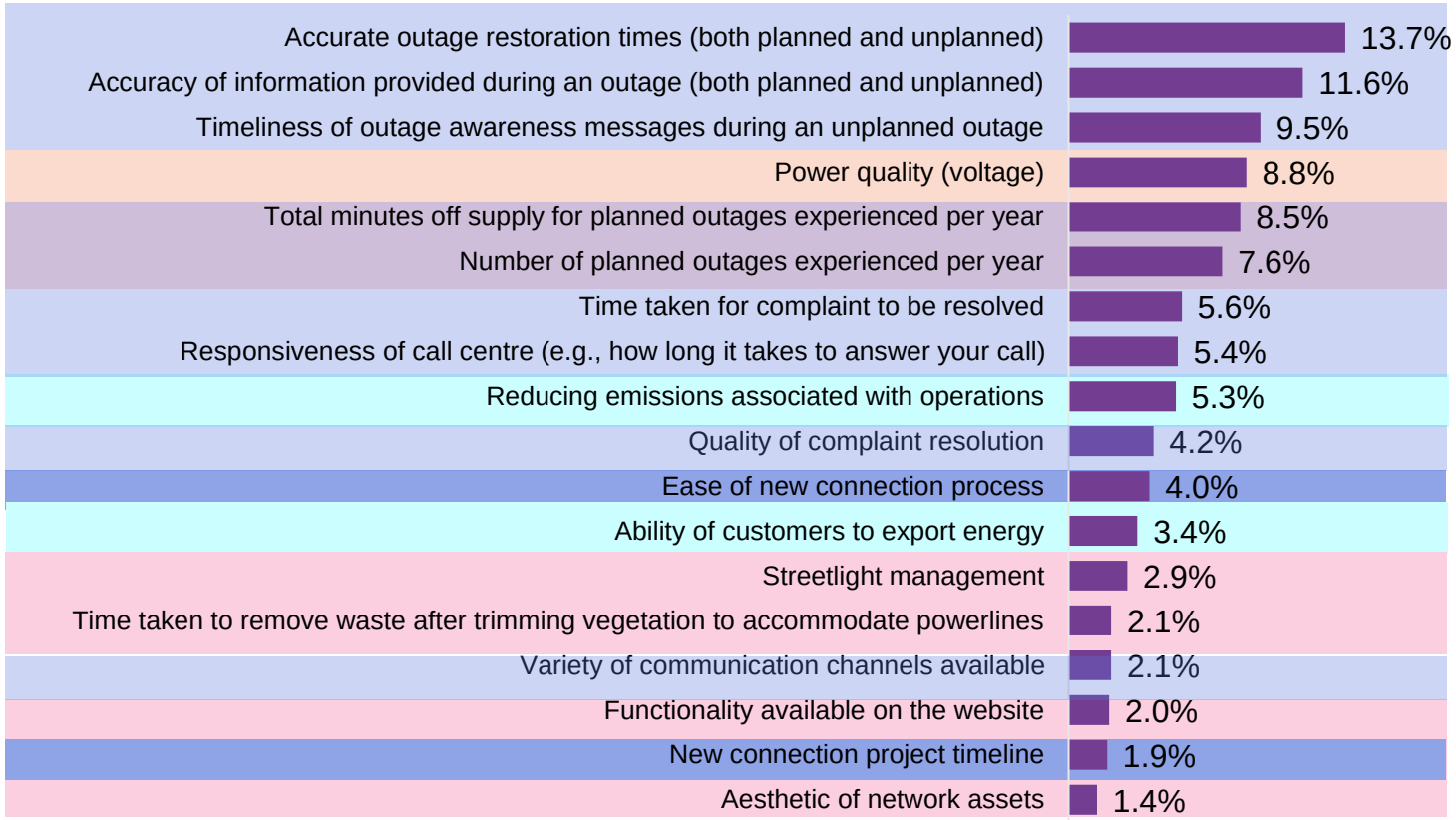
Research to inform this program and 2026-2031 Regulatory Reset Proposal



What did customers value?

Services associated with communications during outage experiences emerged as key priorities. Outside of this, *Power quality* was also notable

Max Diff Model – All customers*



*Slide 13 provides further context on the MaxDiff methodology which was used to create this chart.

Themes across services prioritised by customers

1. Information provided during an outage (both planned and unplanned)
2. Power quality (voltage)
3. Frequency and duration of outages
4. Clean energy transition
5. Maintenance
6. New Connections

This is an overall customer view, however it is important to note that all data throughout this report has been analysed and considered at an individual network level before being presented at an aggregate / overall.

Multiple inputs are needed to determine a recommendation for priority CSIS metrics (the summary presented here provides a consumer perspective only and will be used as one of multiple inputs into determining a recommendation for prioritised CSIS metrics)

Service areas valued by customers | *Service areas growing in importance*

Services valued by customers

Information provided during an outage (both planned and unplanned)

- Among the top priorities across all three networks were services related to information and communications shared during customers' outage experiences.
- Three key measures were used to measure customer perception of information and communications provided during an outage: outage wait times, call centre wait times, and gap between customers' expectations and experience when contacting a call centre.

Power quality (voltage)

While power quality (voltage) was prioritised within the top ten across all three networks, Powercor and United Energy prioritised it higher than CitiPower.

It is important to note that this research did not distinguish between voltage fluctuations and MAIFI. This is a topic to be explored more deeply in other engagements planned for 2023 as well as Phase 2 of this research program (2024).

Frequency and duration of outages

Research analysed across each network suggests that planned outages are generally well managed and there was no major concern about the number or frequency of outages. Therefore, there may be an opportunity to prioritise investment for other areas, where service improvement may have greater impact to customer experience.

Access to renewable energy emerged as a growing priority

- Although not consistent across all three networks, the ability to export solar was prioritised in the top 10 for Powercor customers.

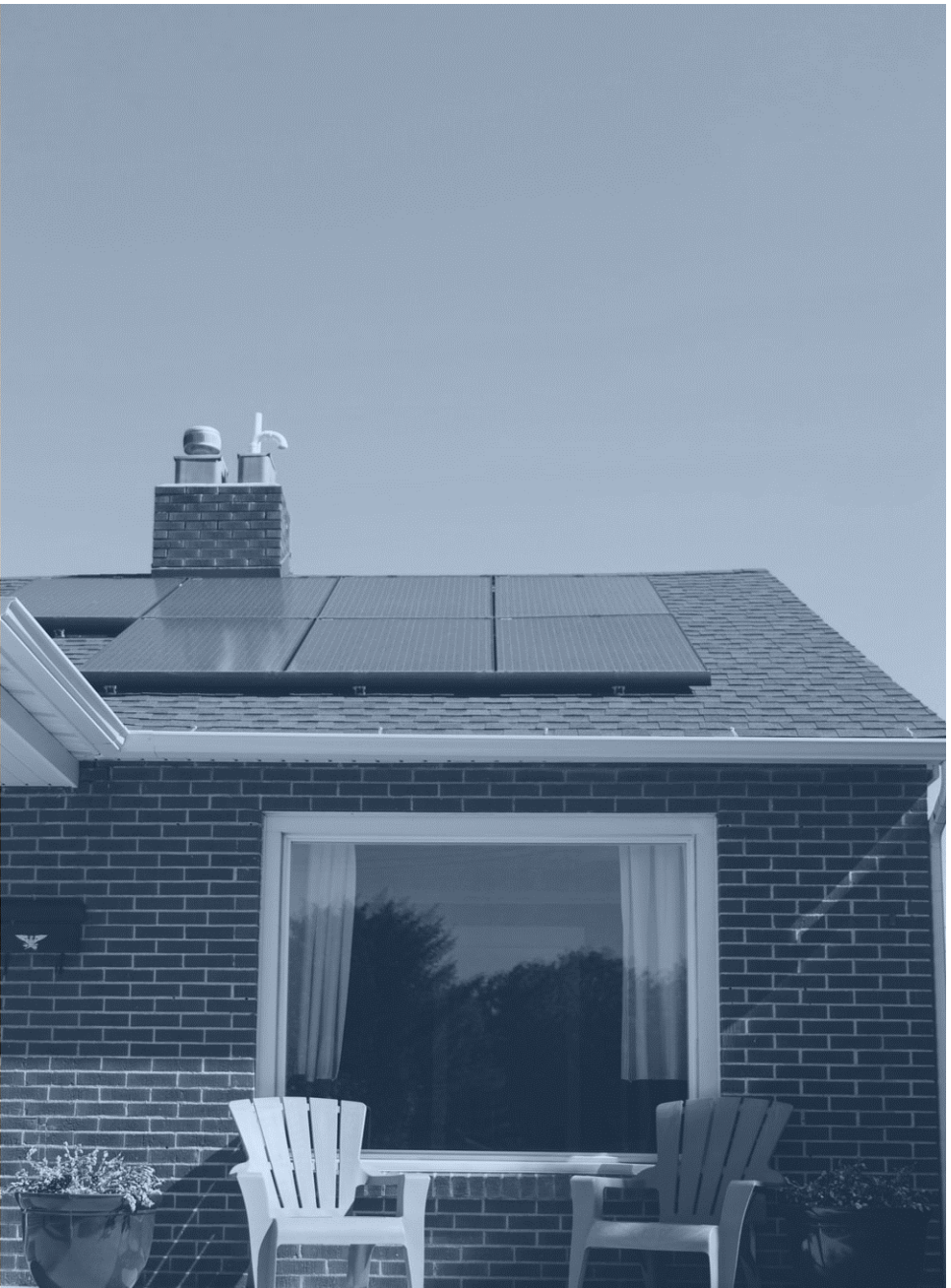
Key insights and Implications

- During an unplanned outage a wait time of between 20-25 mins before receiving info from their distributor was generally considered reasonable.
- When customers are contacting a call centre, wait times across all three networks were considered acceptable for up to 3-5 mins.
- When looking at customers expectations of contacting a call centre compared with their actual experience, little difference emerged across the three networks. However, when considering the expectations and experience of Business and Residential customers, Business customers tended to report a worse experience than expected.
- For residential customers, generally the performance of call centre wait times met their expectations. Additionally, all customers ranked call centre wait times 8th (of 18 services) in importance. Therefore, this may present an opportunity for targeted improvement for business customers in this area.

- Qualitative research indicated that the growing emphasis on power quality (voltage) was influenced by various factors, including:
  1. The need for greater equity in service levels between rural/regional areas and metropolitan areas.
  2. The desire to actively participate in the energy transition, particularly among rural/regional communities.
  3. Increased reliance on energy, such as the notable rise in remote work.
- The differing motivations behind the prioritisation of power quality (voltage) across different networks suggest that if prioritised for inclusion as customer service metrics, it will be critical to establish specific targets tailored to each network to meet customer expectations in this regard.

- The **planned outage** process generally met expectations of customers across each network. However, CitiPower customers generally had a lower expectation and experience rating than Powercor and United Energy.
- Similarly, CitiPower customers generally expected the **unplanned outage** process to be easier than experienced. Particularly in comparison with Powercor and United Energy customers.
- This may be attributed to increased outage anxiety experienced by metropolitan customers who are unaccustomed to outages, unlike their regional counterparts.
- Given the current strong performance of **planned outage** experiences, including exploration of preferred communication methods and other aspects of the customer experience for an **unplanned outage** experience during Phase 2 of this research program is recommended.
- Similar to the experience we looked at earlier for call centres. When it comes to unplanned outage experience Business customers typically report a larger gap between their expectations and actually experience (than residential customers).
- Again, this suggests an opportunity for greater impact on the improvement of customer experience, with targeted investment for certain customer types (e.g., business customers).

- The higher value placed on ability to export solar for Powercor customers is expected given Powercor has the higher proportion of customer who currently have solar.
- Qualitative research conducted in June 2023 suggested that in the context of growing cost of living and pressure to transition to renewable energy, this service was increasing in importance for customers .
- Almost half of customers across all networks are considering purchasing solar within the next two years.



This research plays a crucial role in determining the prioritisation of customer service metrics for testing in Phase 2 of this research program. However, to ensure a comprehensive and reliable recommendation, multiple inputs were necessary. It was critical to consider this consumer data in the holistic context of the business. Therefore, the results from this research form one input into a strategic recommendation.

A set of criteria has been established to facilitate this prioritisation process. The completion of this strategic framework (slide 7) is an ongoing process in consultation with the CSIS Working Group.

Multiple factors will need to be considered by the CPPALUE team to determine priority CSIS metrics for testing in Phase 2

The following criteria were developed to support this process and ensure the robustness of solutions tested in Phase 2:

1 Importance to customers

This criteria reflects the importance of the survey results in understanding which attributes customers valued and prioritised for improvement.

2 Feasibility for the next Regulatory Reset period

In terms of the likelihood and feasibility of implementations and improvement, there are some services that are more difficult or complicated. For example, some services may be prohibitively expensive to improve, or any improvements possible may be marginal.

3 Feasibility of measurement

For some services, it may not be possible or easy to define measurable metrics. This criteria ensures that testing in Phase 2 focusses on metrics that can realistically be implemented as part of the Regulatory Reset.

4 Type of Customers impacted

Some services may be more relevant to a particular type of customer. For example, new connection process is likely to be more relevant for business customers than residential customers because they are likely to experience the new connection process more frequently.

Having this criteria in place helps to identify the volume of customers impacted and any metrics that may be targeted to particular customer segments.

5 Future relevance

Based on previous qualitative research, there are some topics that are likely to become increasingly important in the future, beyond the immediate Regulatory Reset period. One such attribute is ability of customers to export energy.

A rigorous quantitative approach was used to understand customer priorities

Maximum Difference Scaling (MaxDiff) measures the relative importance of services provided by CitiPower, Powercor, and United Energy on Customer satisfaction across different touchpoints.

MaxDiff was used for this phase of research because it is the most appropriate methodology for testing customer priorities for solutions and where value lay within these solutions.

How it works:

MaxDiff is a statistical technique used to model choice trade-off. Respondents are presented sets of attributes and repeatedly asked to indicate which attribute is the most appealing and which is the least. By having respondents do this multiple times, the relative level of importance placed on each attribute is revealed.

Why use MaxDiff?

It is often observed that a consumer's stated intentions and actual behavior do not match. MaxDiff addresses this by revealing consumer preferences through making trade-offs, rather than relying on their statements.

MaxDiff provides a clear hierarchy of which attributes have the greatest impact on consumer satisfaction.

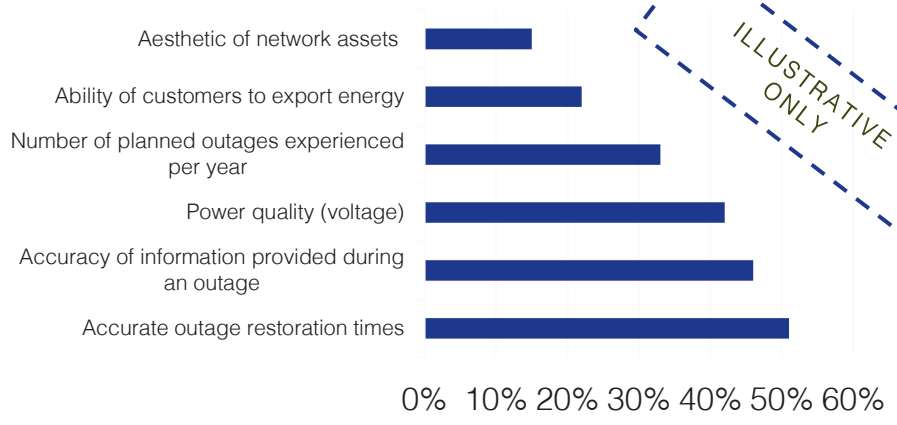
Furthermore, at Forethought we use Bayesian techniques when modelling MaxDiff. This results in greater robustness because Bayesian analysis techniques are not reliant on large sample sizes and data is simply analysed for what it is. The results are not dependent on the sample size, but rather the resampling.

Which of the following is more important to you?

ILLUSTRATIVE ONLY

MOST IMPORTANT	ELEMENT	LEAST IMPORTANT
✓	Accurate outage restoration times	○
○	Accuracy of information provided during an outage	✓
○	Quality of complain resolution	○
○	Power quality (voltage)	○

Prioritisation of service offerings

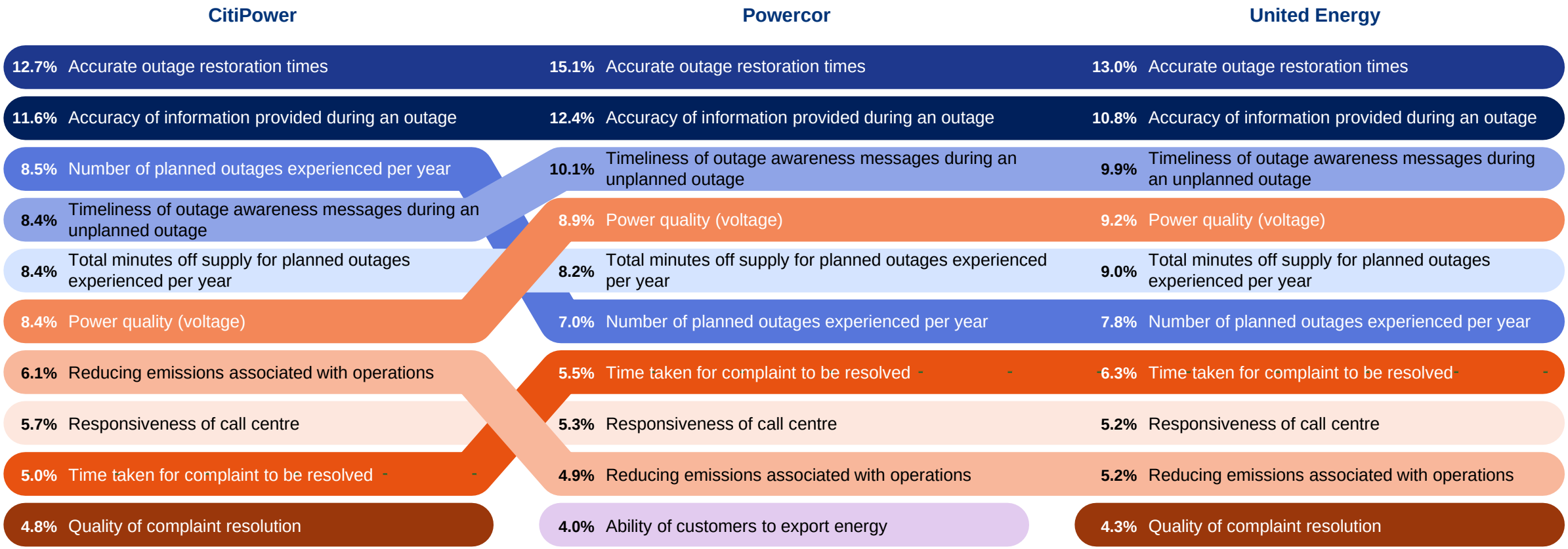


CitiPower Powercor Australia united energy Forethought Outcomes

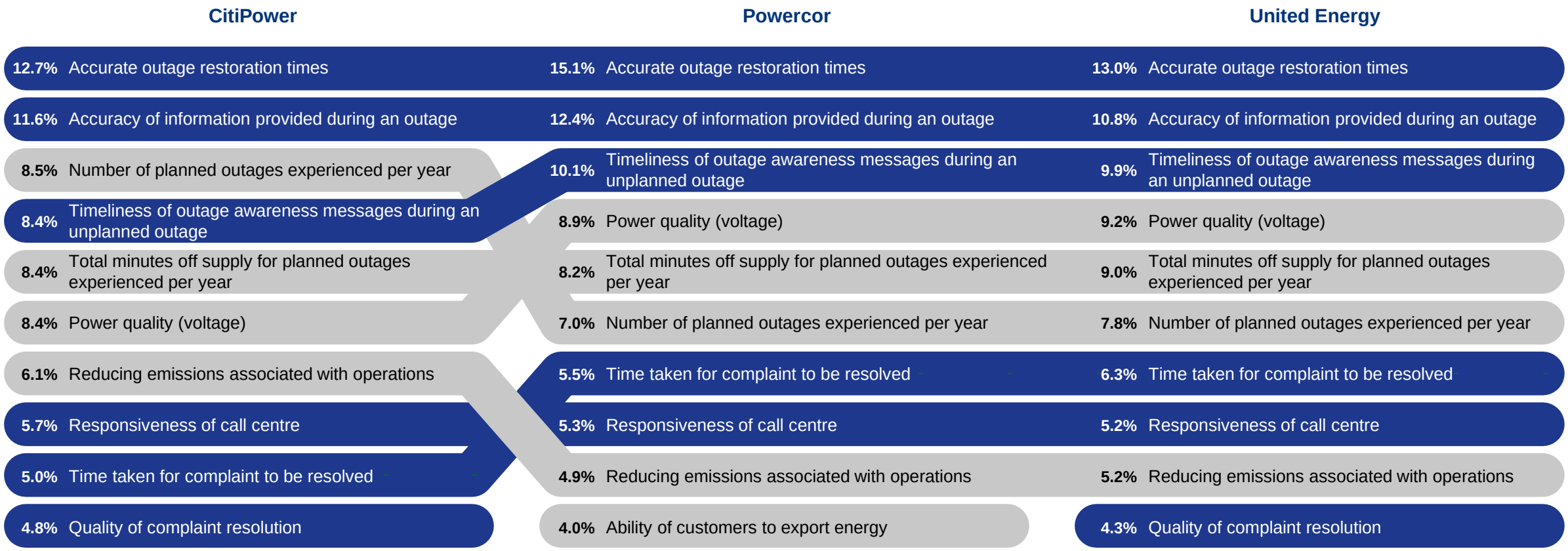
Unpacking what customers valued

Highly valued services were mostly consistent across all three networks but other than the top two, where they placed on level of importance differed

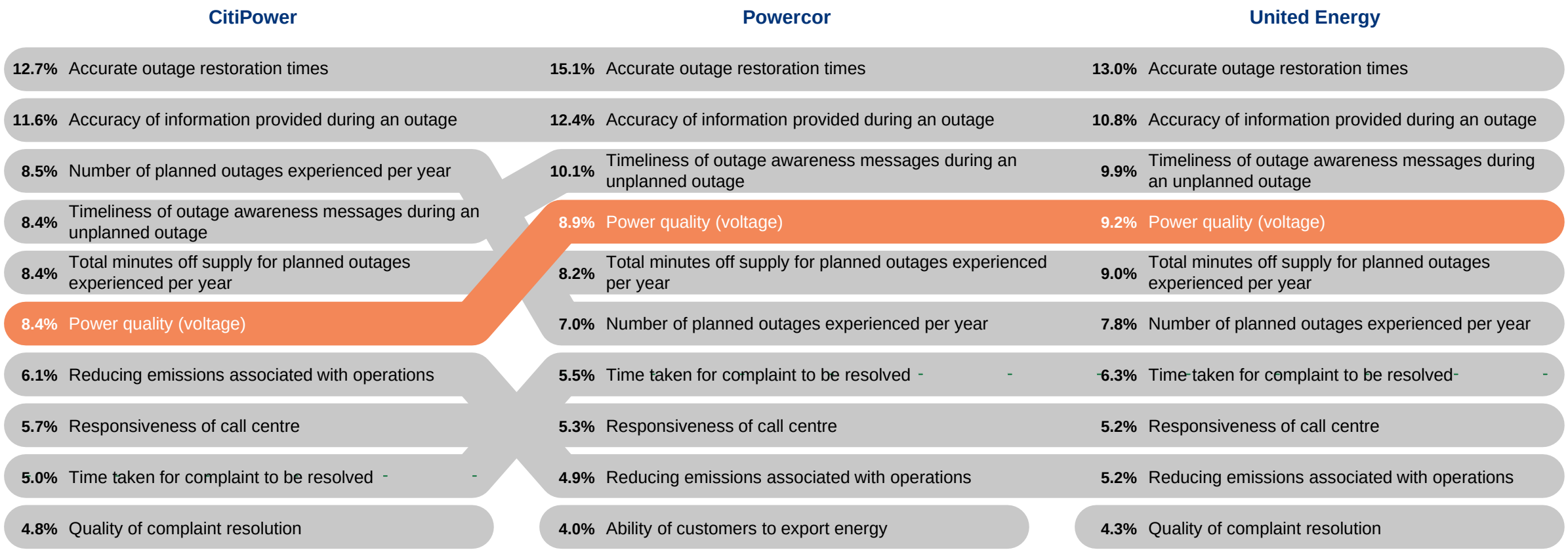
The chart below represents the top 10 ranked services of those tested in this research program. Each service is represented by a different colour. The same colour is used for each service across the networks and shows how customers' priorities diverge across the distributors below.



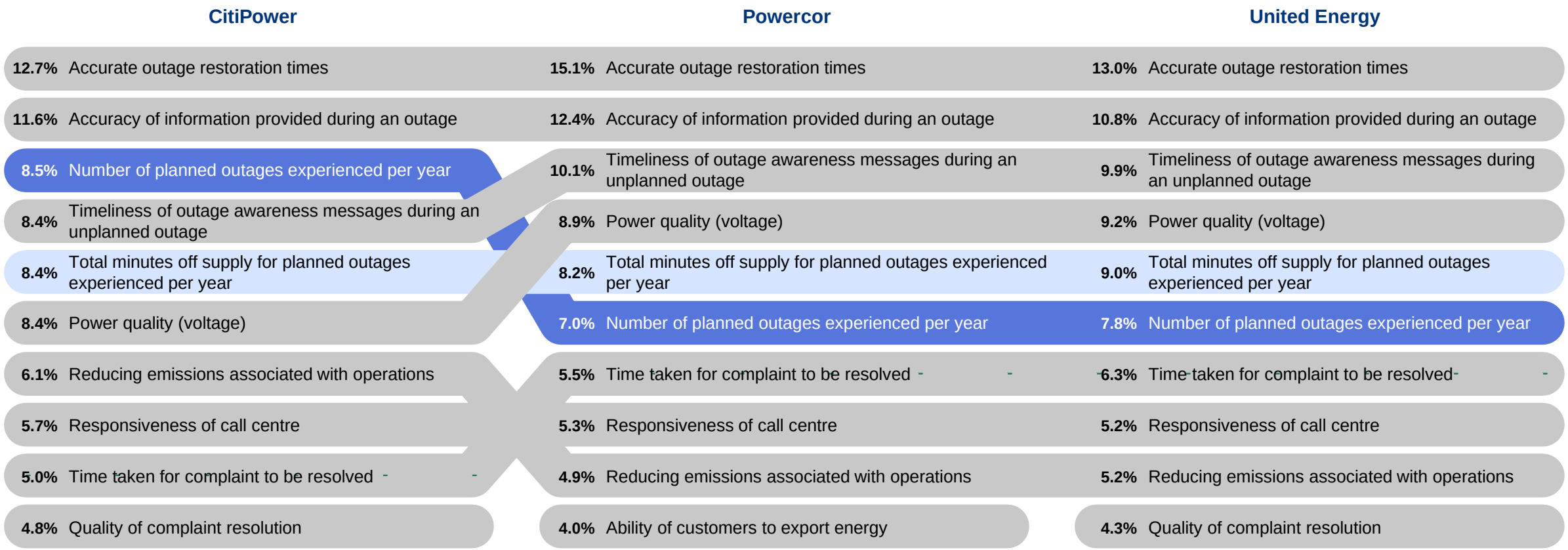
Information or communications (shown in blue below) related to outage experience: Among the top priorities across all three networks were services related to communications or information shared with customers



Power quality (voltage) was prioritised among the top five services for Powercor and United Energy customers, and sixth for CitiPower



Services related to customers' experiences of **outages** (outside information communicated) emerged consistently high across all three networks



Surprisingly, *Ability to export energy* did not rank highly amongst customers across networks, despite previous qualitative research indicating its growing importance

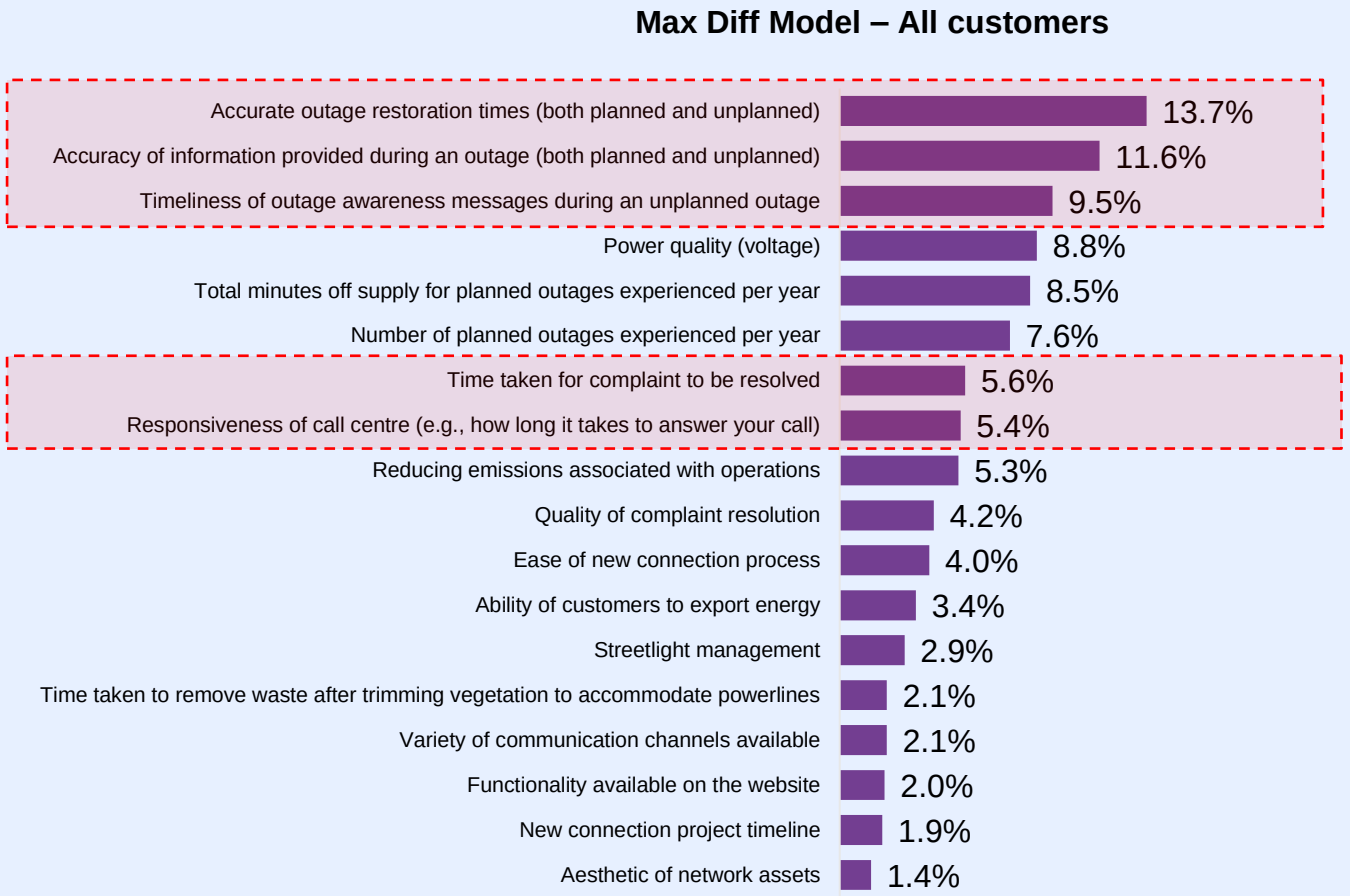
CitiPower		Powercor		United Energy	
12.7%	Accurate outage restoration times	15.1%	Accurate outage restoration times	13.0%	Accurate outage restoration times
11.6%	Accuracy of information provided during an outage	12.4%	Accuracy of information provided during an outage	10.8%	Accuracy of information provided during an outage
8.5%	Number of planned outages experienced per year	10.1%	Timeliness of outage awareness messages during an unplanned outage	9.9%	Timeliness of outage awareness messages during an unplanned outage
8.4%	Timeliness of outage awareness messages during an unplanned outage	8.9%	Power quality (voltage)	9.2%	Power quality (voltage)
8.4%	Total minutes off supply for planned outages experienced per year	8.2%	Total minutes off supply for planned outages experienced per year	9.0%	Total minutes off supply for planned outages experienced per year
8.4%	Power quality (voltage)	7.0%	Number of planned outages experienced per year	7.8%	Number of planned outages experienced per year
6.1%	Reducing emissions associated with operations	5.5%	Time taken for complaint to be resolved	6.3%	Time taken for complaint to be resolved
5.7%	Responsiveness of call centre	5.3%	Responsiveness of call centre	5.2%	Responsiveness of call centre
5.0%	Time taken for complaint to be resolved	4.9%	Reducing emissions associated with operations	5.2%	Reducing emissions associated with operations
4.8%	Quality of complaint resolution	4.0%	Ability of customers to export energy	4.3%	Quality of complaint resolution

Detailed Findings

1. Information provided during an outage (both planned and unplanned)

Among the top priorities across all three networks were services related to information shared during a customers' outage experiences:

- *Accurate outage restoration times*
- *Accuracy of information provided during an outage*
- *Timeliness of outage awareness messages during an unplanned outage*
- *Time taken for complaint to be resolved*
- *Responsiveness of call centre*



Three key measures were used to analyse customer perception of information provided during an outage

1. Outage wait times

Elasticity in wait times measured what customers found to be an acceptable wait time before receiving information during an unplanned outage.

Information provided during an outage was a priority for customers of all three networks and provides added context to customers' experience and perception of this key attribute.

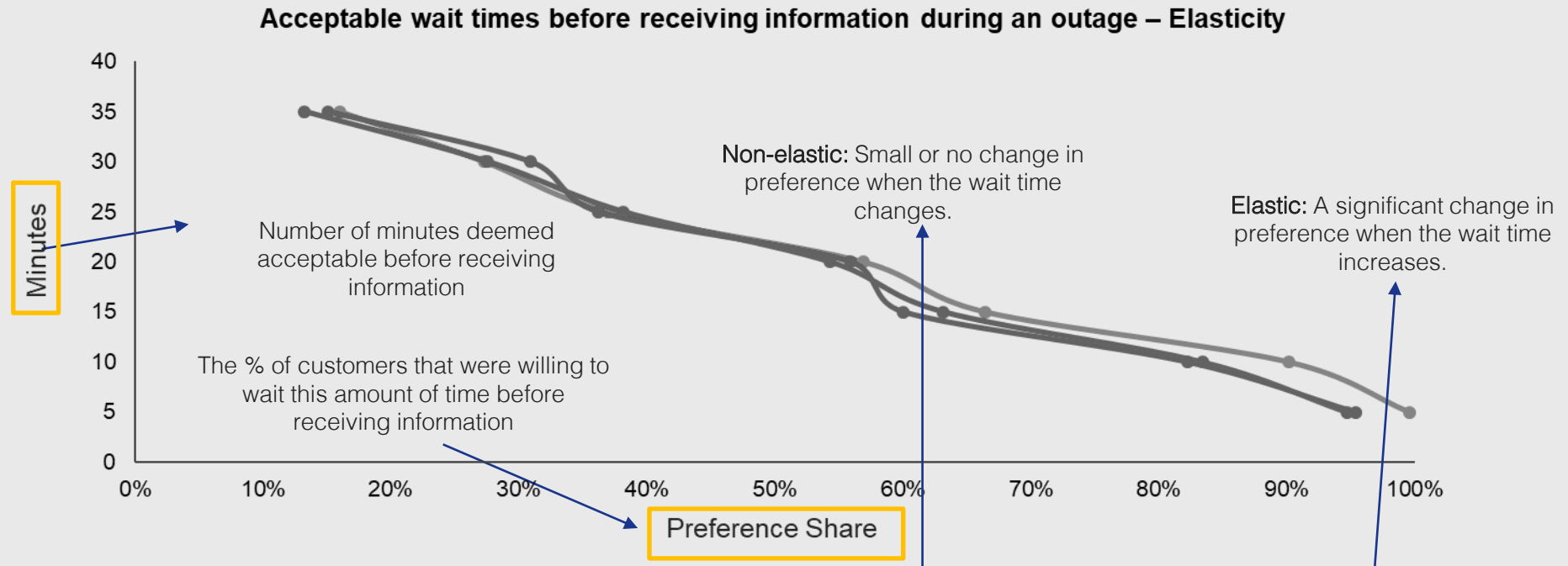
2. Call centre wait times

Similarly, price elasticity was used to measure what customers thought to be an acceptable wait time before speaking to a representative during an unplanned outage. This measurement provides further context for customers' perceptions of call centre wait times during an unplanned outage.

3. Expectation experience gap when contacting the call centre

By measuring the difference between customers' expectations vs. experience when contacting a call centre, we can gain insight into the different approaches in improving services necessary for different kinds of customers. For example, whilst the expectation vs. experience gap did not differ between customers of different networks, it differed between Consumer and Business customers.

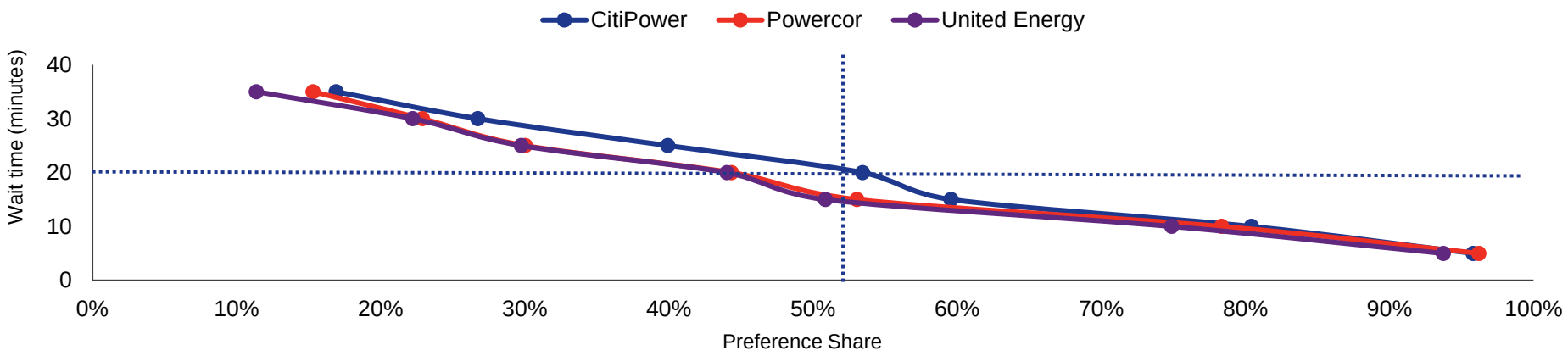
How to read: elasticity in wait times



Wait Time in minutes	Powercor		CitiPower		United Energy	
35	16.0%	ELASTIC	13.3%	ELASTIC	15.1%	ELASTIC
30	27.3%	ELASTIC	27.6%	ELASTIC	30.9%	NON ELASTIC
25	37.0%	ELASTIC	38.2%	ELASTIC	36.2%	ELASTIC
20	56.9%	NON ELASTIC	54.3%	NON ELASTIC	55.9%	NON ELASTIC
15	66.4%	NON ELASTIC	63.2%	NON ELASTIC	60.1%	NON ELASTIC
10	90.1%	NON ELASTIC	83.4%	NON ELASTIC	82.2%	NON ELASTIC
5	99.6%		94.7%		95.3%	

During an unplanned outage, a wait time of up to 20 minutes before receiving information from their distributor was considered reasonable by the majority of customers

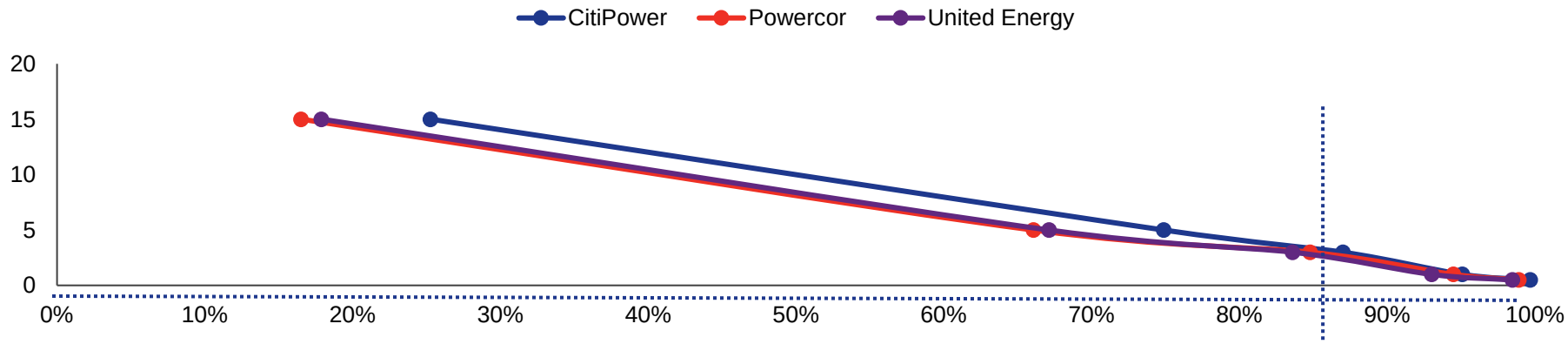
Acceptable wait times before receiving information during an unplanned outage



Wait Time in minutes	CitiPower		Powercor		United Energy	
35	16.9%		15.3%		11.4%	
30	26.8%	ELASTIC	22.9%	ELASTIC	22.2%	ELASTIC
25	39.9%	ELASTIC	30.0%	ELASTIC	29.8%	ELASTIC
20	53.4%	ELASTIC	44.3%	ELASTIC	44.0%	ELASTIC
15	59.6%	INELASTIC	53.0%	INELASTIC	50.9%	INELASTIC
10	80.4%	INELASTIC	78.4%	INELASTIC	74.9%	INELASTIC
5	95.8%	INELASTIC	96.2%	INELASTIC	93.7%	INELASTIC

For all three networks, a wait time of between 3-5 minutes was considered acceptable before speaking to a call centre representative

Acceptable wait times before speaking to a representative during an unplanned outage



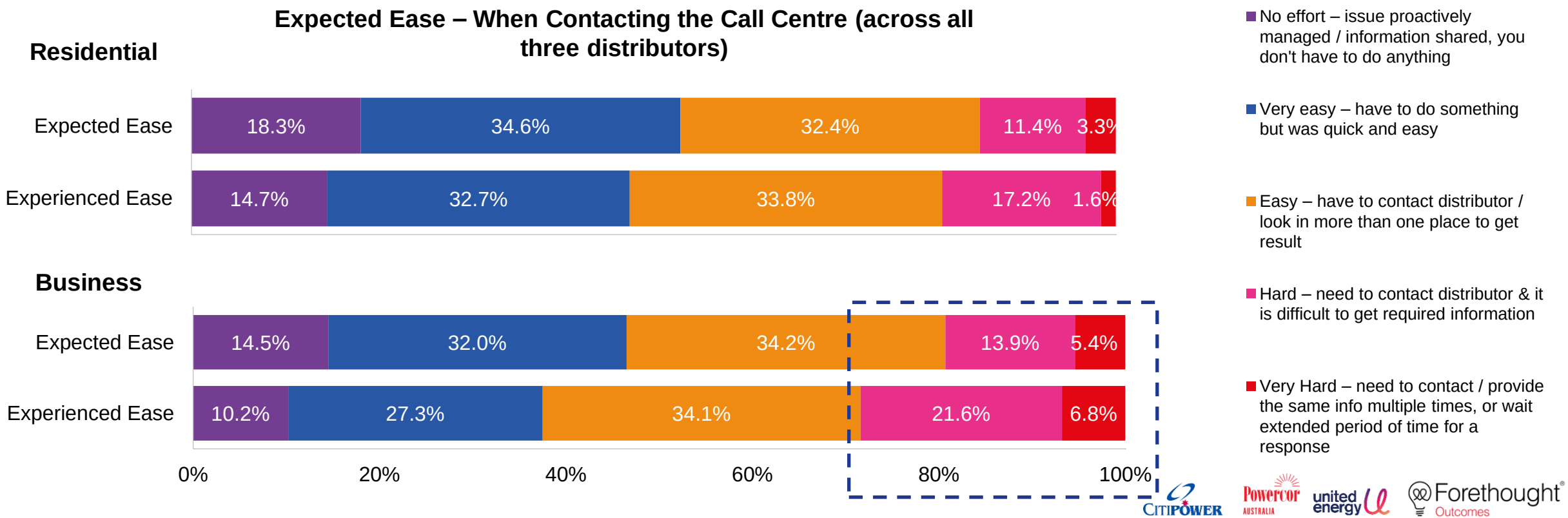
Wait Time in minutes	CitiPower		Powercor		United Energy	
15	25.3%		16.5%		17.9%	
5	74.9%	ELASTIC	66.1%	ELASTIC	67.1%	ELASTIC
3	87.0%	INELASTIC	84.8%	INELASTIC	83.6%	INELASTIC
1	95.1%	INELASTIC	94.5%	INELASTIC	93.0%	INELASTIC
0.5	99.7%	INELASTIC	98.9%	INELASTIC	98.5%	INELASTIC

Almost half of Powercor customers (44.2%) and nearly one quarter of CitiPower and United Energy customers (23.4%) have experienced an unplanned outage in the past 12 months.

However, only 12% of Powercor customers contacted the call centre during this experience. Marginally more than the 10% of CitiPower customers and 7% of United Energy customers. Previous research found that because they experience more outages generally, they have less anxiety than CitiPower or United Energy customers.

While there was little difference across distributors when it came to call centre experience, there was a larger gap comparing residential and business customers

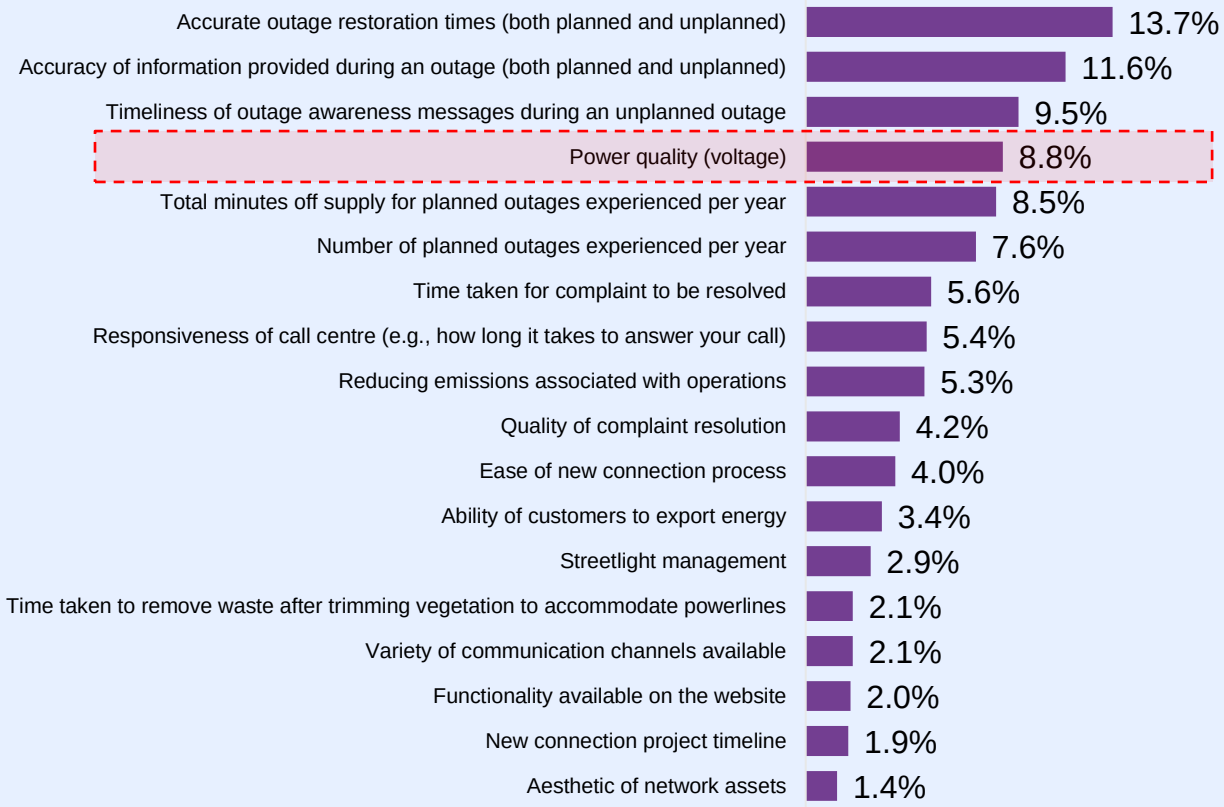
Business customers tended to have a worse experience than expected when compared with residential customers. Which may be due to greater anxiety that outages may impact business operations or ability to generate revenue.



2. Power Quality (voltage)

Based on an examination of both past and current qualitative studies, it was observed that the growing emphasis on power quality (voltage) was influenced by various factors (see overleaf).

Max Diff Model – All customers



Power Quality (voltage) had increased in priority across all customers and in particular for Powercor and United Energy

Reviewing previous qualitative research as well as 2023 qualitative research with Rural and Regional customers suggests the increasing prioritisation of power quality (voltage) was being driven by multiple factors.

Generally, a greater reliance on electricity supply

Since COVID, there has been significant uplift in the number of people remote working. Generally, over the last few years there had been a greater reliance on customers' electricity supply due to greater technology / appliance use.

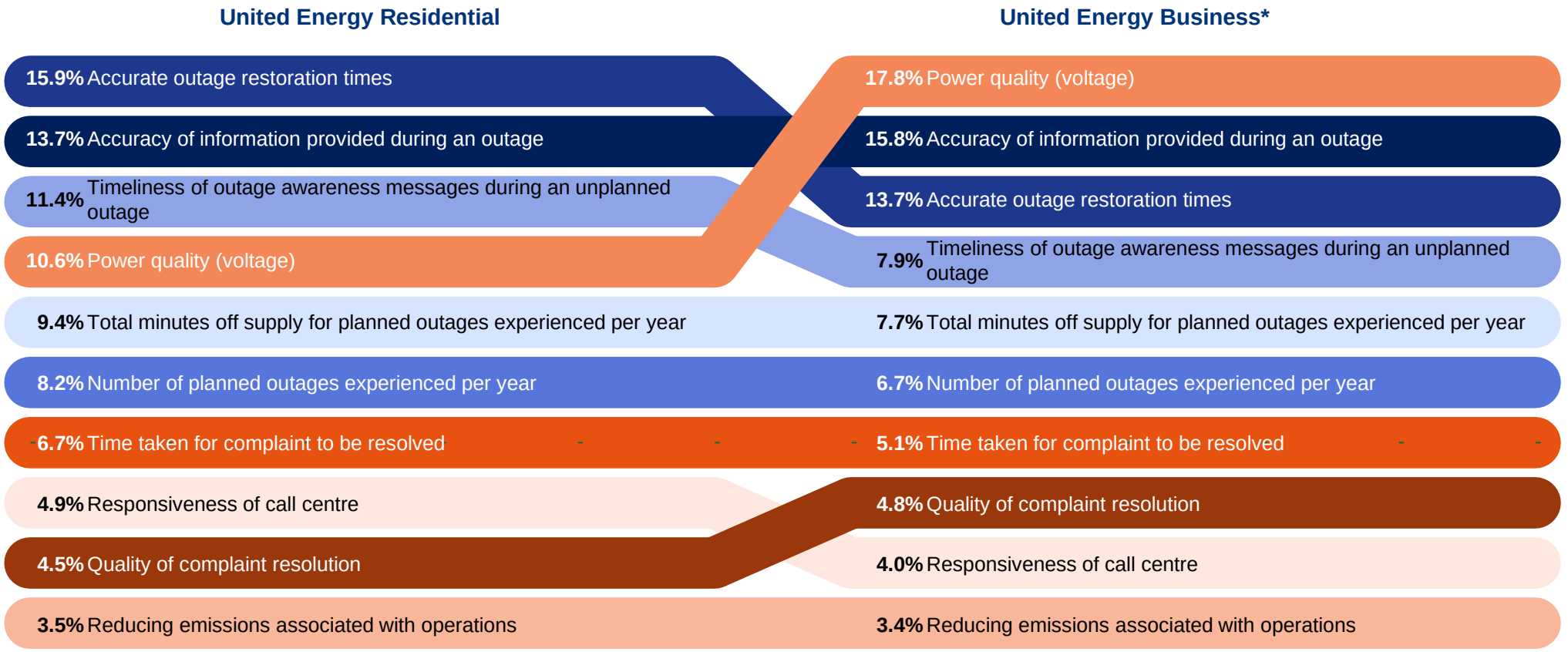
Desire for greater equity between rural / regional and metro

In particular Powercor and United Energy view power quality (voltage) and reliability as enablers of greater equity between regional / rural and metro areas.

Ability to participate in the energy transition

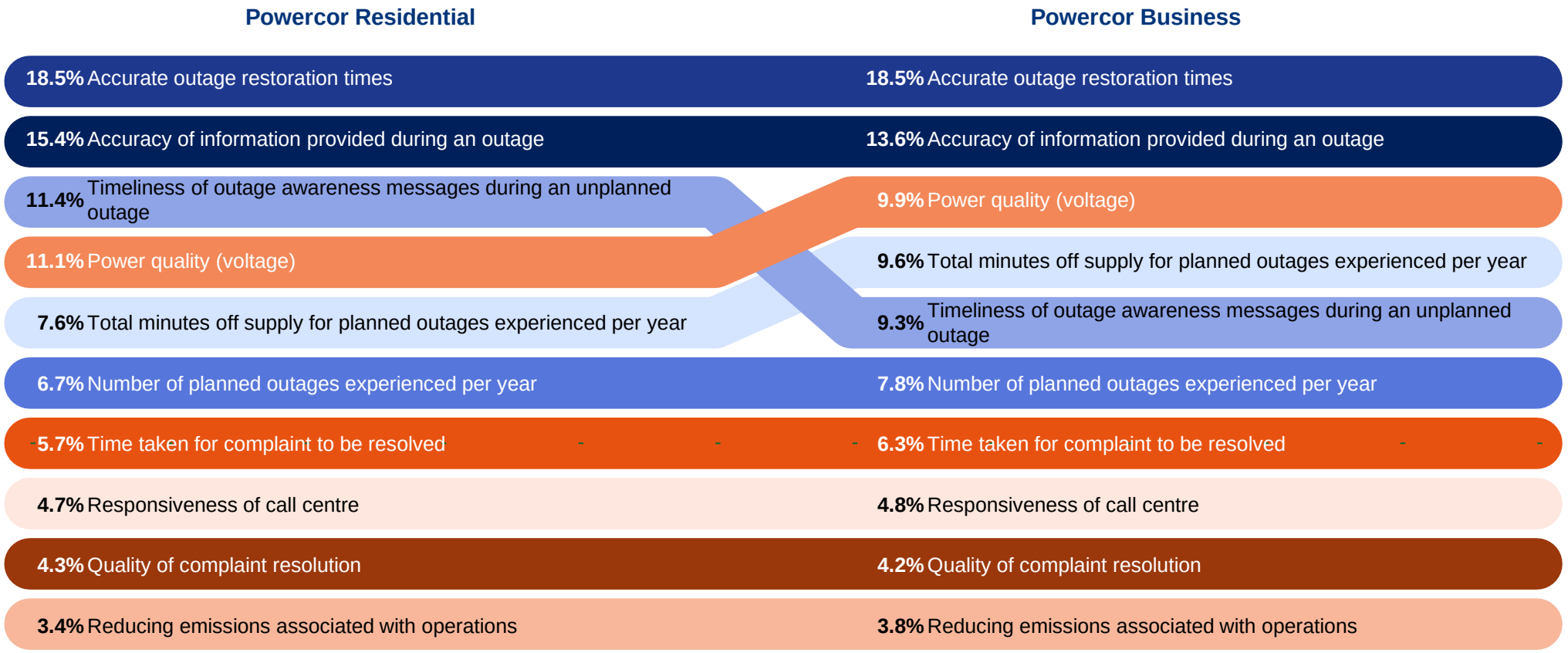
But more broadly across all customers there was growing awareness and concern for the ability of their electricity networks to support the transition to renewables.

When compared with residential customers Power quality emerged as a higher priority for both **United Energy Business customers**...



Note: *No sample was collected for C&I within United Energy, so Business results are purely SMB.

...and **Powercor** Business customers



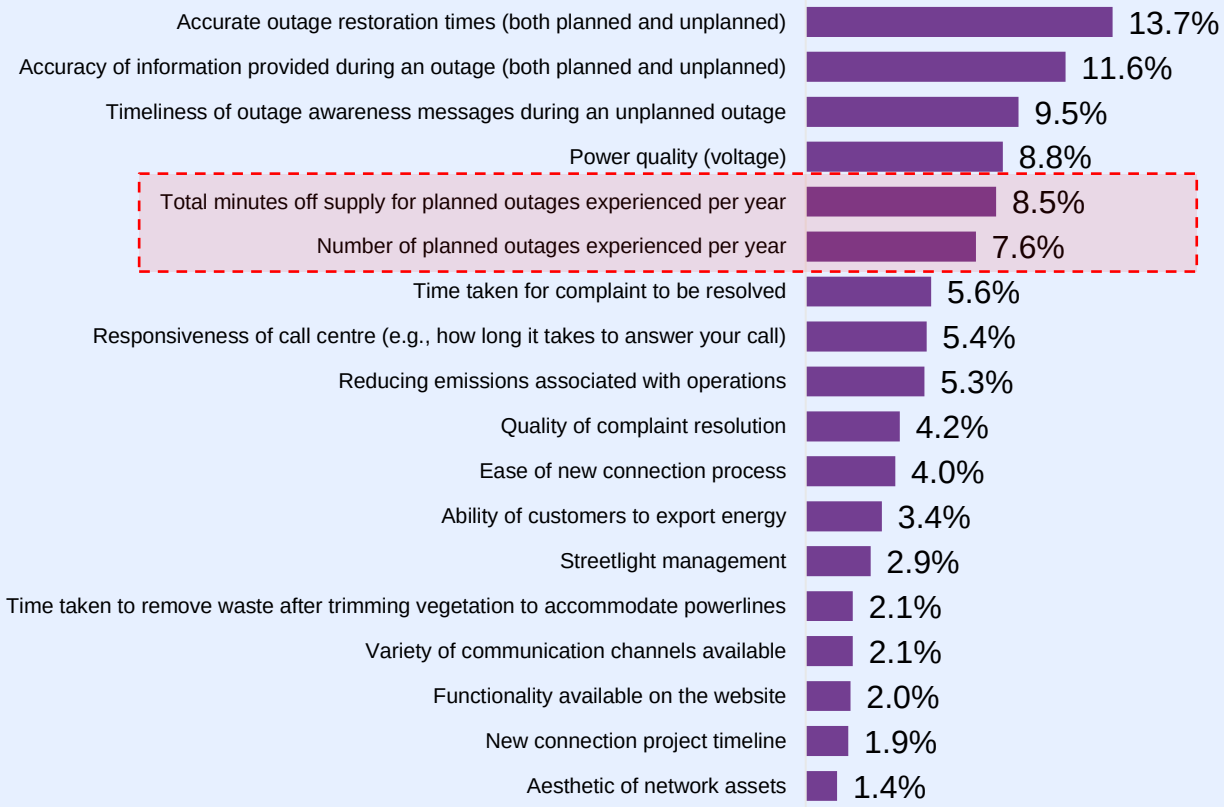
Note: *n=4 sample was collected for C&I within Powercor, Business results shown above are a mix of n=4 C&I and SMB customers.

3. Frequency and duration of outages

Customers highly value services associated with their outage experience. However, when considering potential improvements in customer service, particularly in these areas, the cost and impact must be carefully assessed. It is important to note that significant investment by the distributor may only yield marginal enhancements in the customer experience. The following are the attributes tested in this research program associated with this theme:

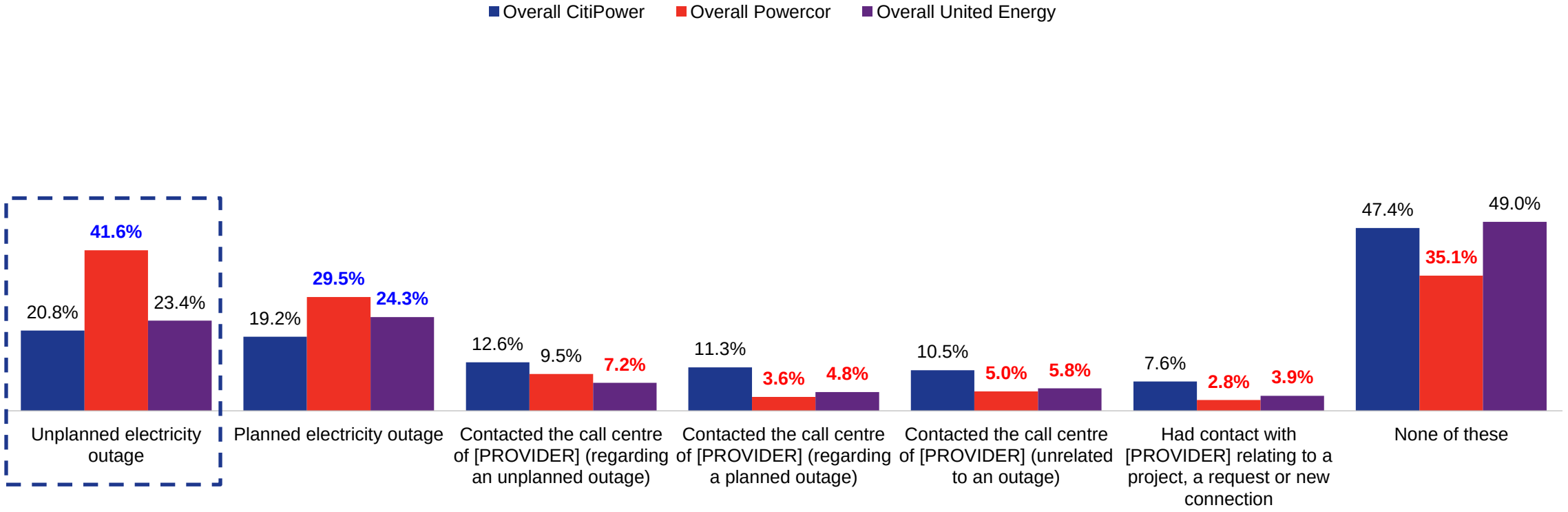
- *Total minutes off supply for planned outages*
- *Number of planned outages experienced per year*

Max Diff Model – All customers



Almost half of Powercor customers and one quarter of CitiPower and United Energy customers have experienced an unplanned outage in the last twelve months

In the last 12 months, which of the following have you experienced?

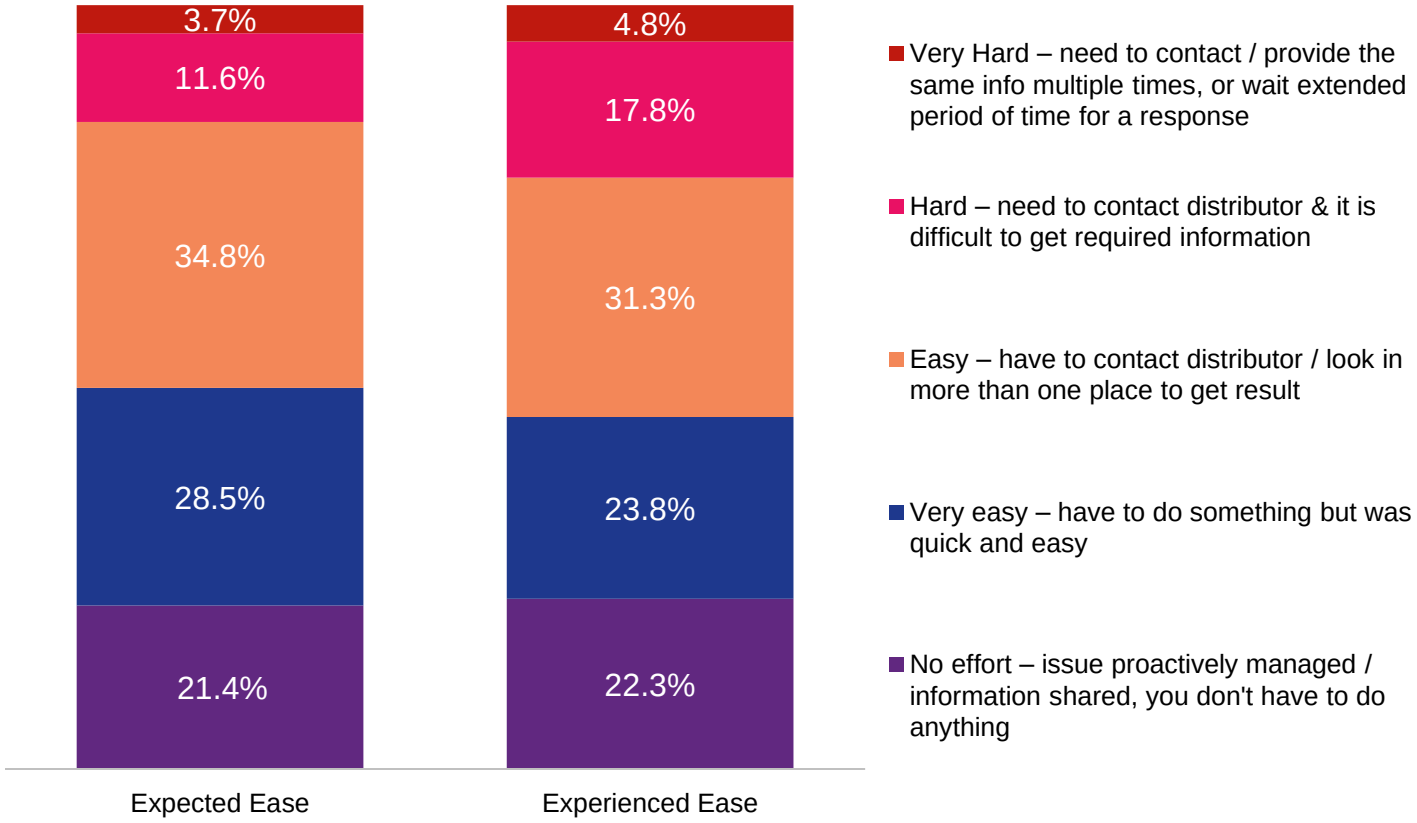


Note: Significance testing was conducted between CitiPower and the other suppliers at the 5% level of significance. This has been done in order to understand the differences between distributors. Blue indicates that the other supplier result was significantly higher than the CitiPower result and red indicates that it was significantly lower. Multiple responses were allowed for this question, so these results may not sum to 100%.

Generally, CitiPower customers' experiences were harder than expected during an **unplanned outage**

Previous qualitative research indicated that CitiPower customers are generally **less** accustomed to unexpected power outages compared to customers on other networks. Consequently, when faced with an unplanned outage, CitiPower customers tended to exhibit higher levels of anxiety in relation to their experience. This heightened emotional state helps explain why there was a greater disparity in expectations versus actual experience for CitiPower, as compared to Powercor or United Energy.

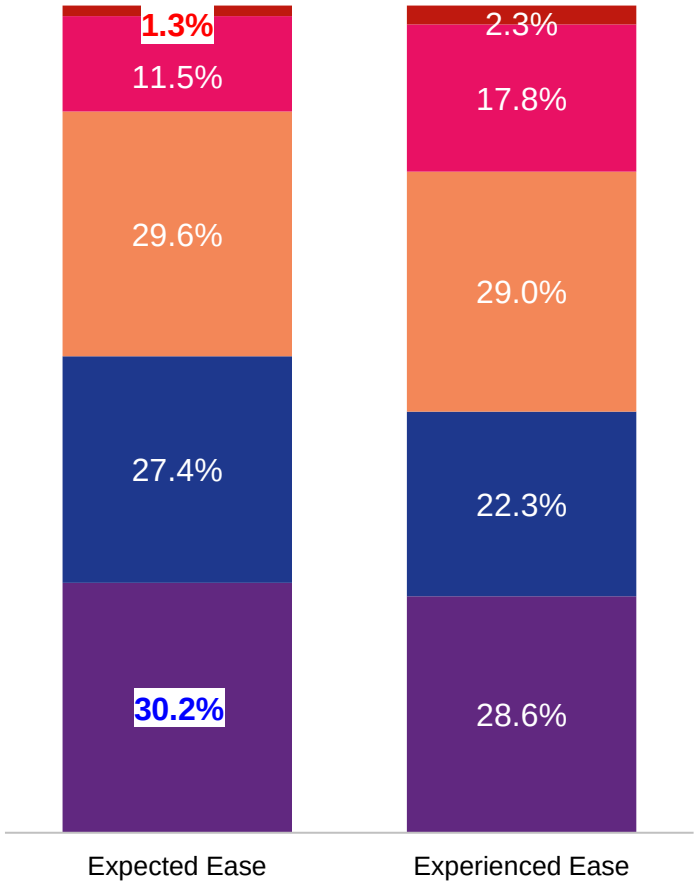
Expected vs Experience Ease – During Unplanned Outage – CitiPower



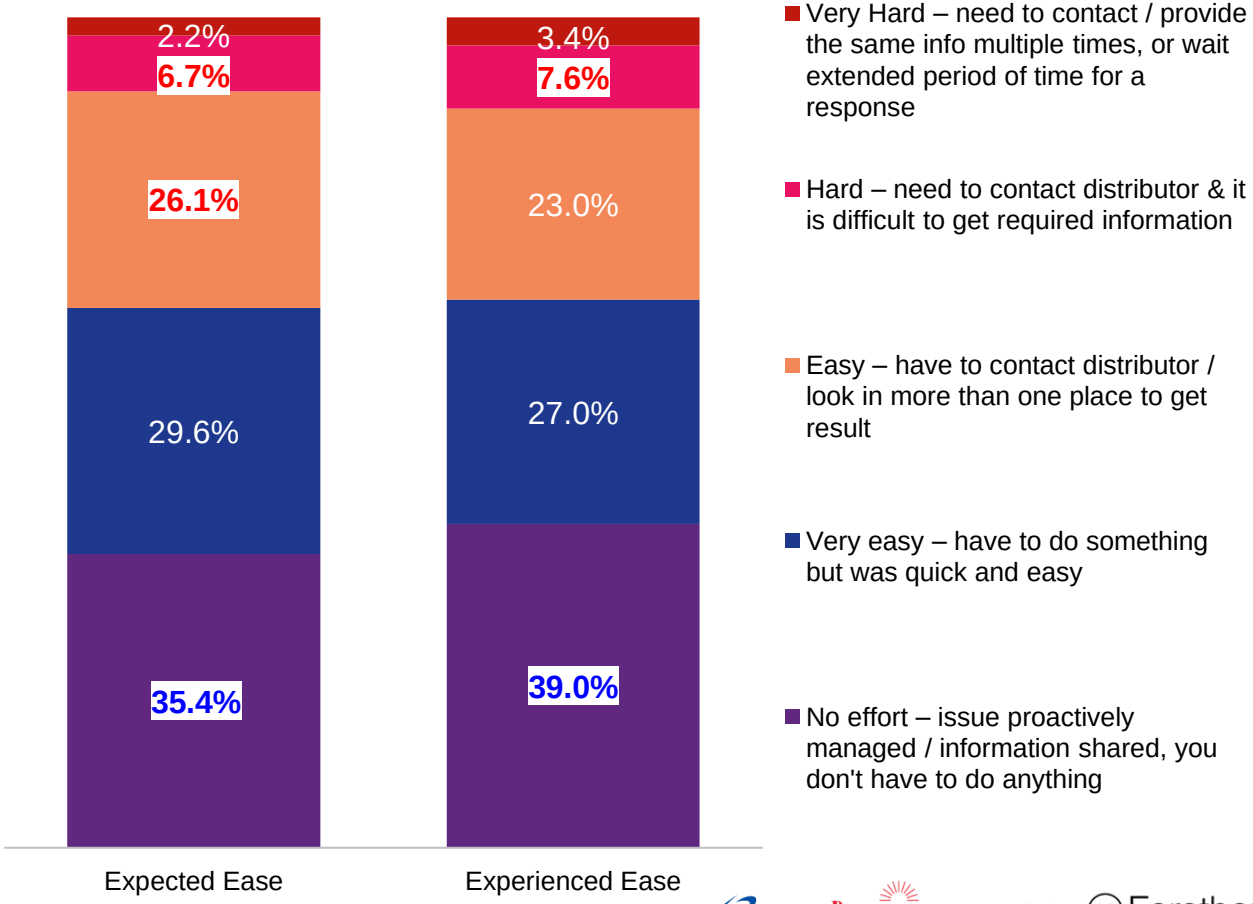
Note: Significance testing was conducted between CitiPower and the other suppliers at the 5% level of significance. This has been done in order to understand the differences between distributors. Blue indicates that the other supplier result was significantly higher than the CitiPower result and red indicates that it was significantly lower.

Conversely, Powercor and United Energy customers' experiences typically met expectations for **unplanned outages**

Expected vs Experience Ease – During Unplanned Outage – United Energy

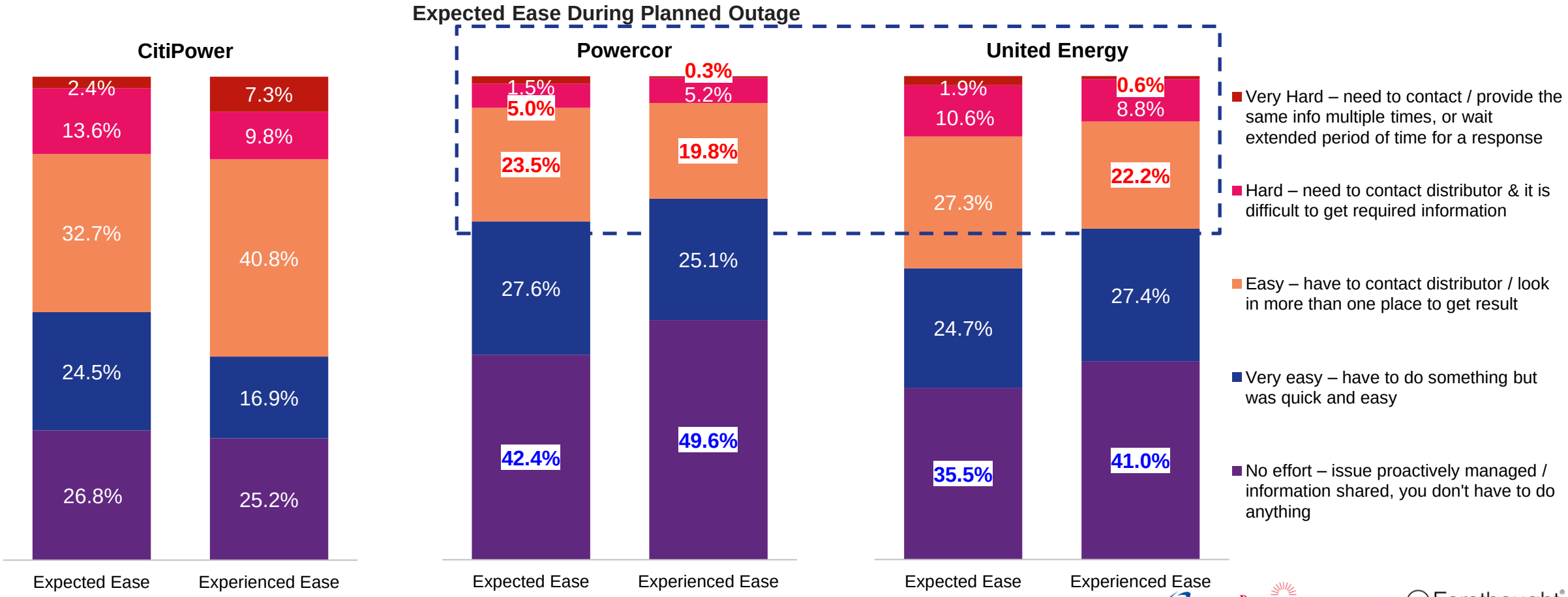


Expected vs Experience Ease – During Unplanned Outage – Powercor



Note: Significance testing was conducted between CitiPower (not shown on slide) and the other suppliers at the 5% level of significance. This has been done in order to understand the differences between distributors. Blue indicates that the other supplier result was significantly higher than the CitiPower result and red indicates that it was significantly lower.

Expectations of customers for a **planned outage** experience were generally met across all three networks, however, Powercor and United Energy had significantly lower expectations than CitiPower



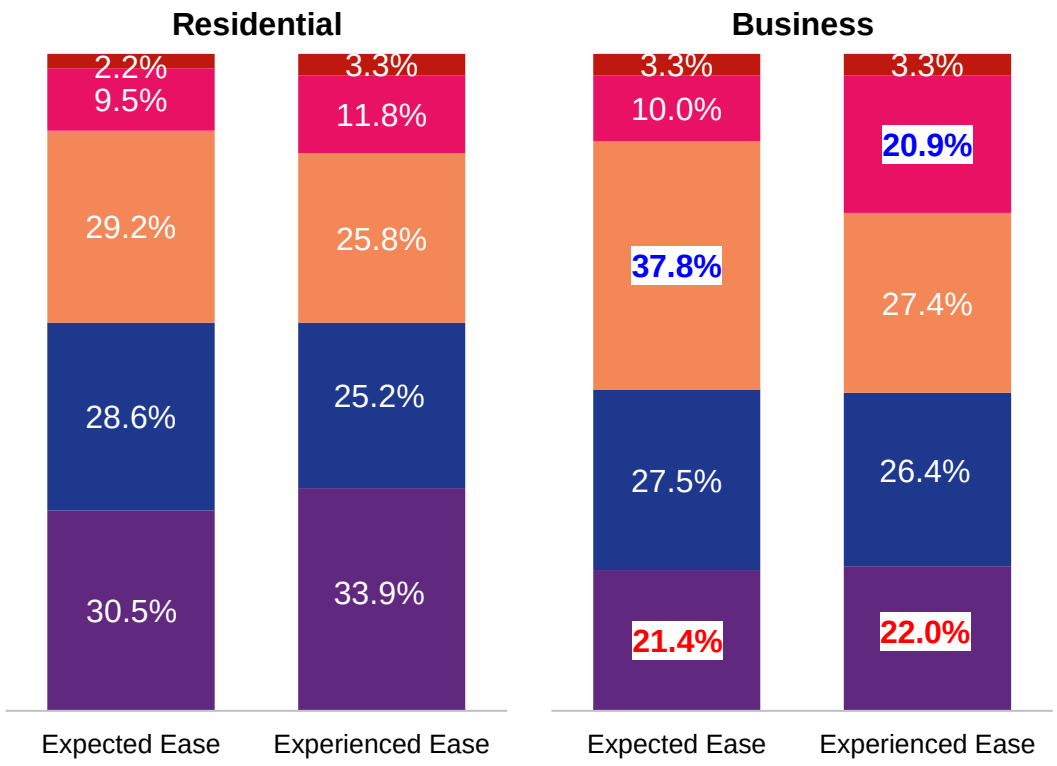
Note: Significance testing was conducted between CitiPower and the other suppliers at the 5% level of significance. This has been done in order to understand the differences between distributors. Blue indicates that the other supplier result was significantly higher than the CitiPower result and red indicates that it was significantly lower.

There was a larger gap for business (over residential) customers between expectations and experience when it came to unplanned outages

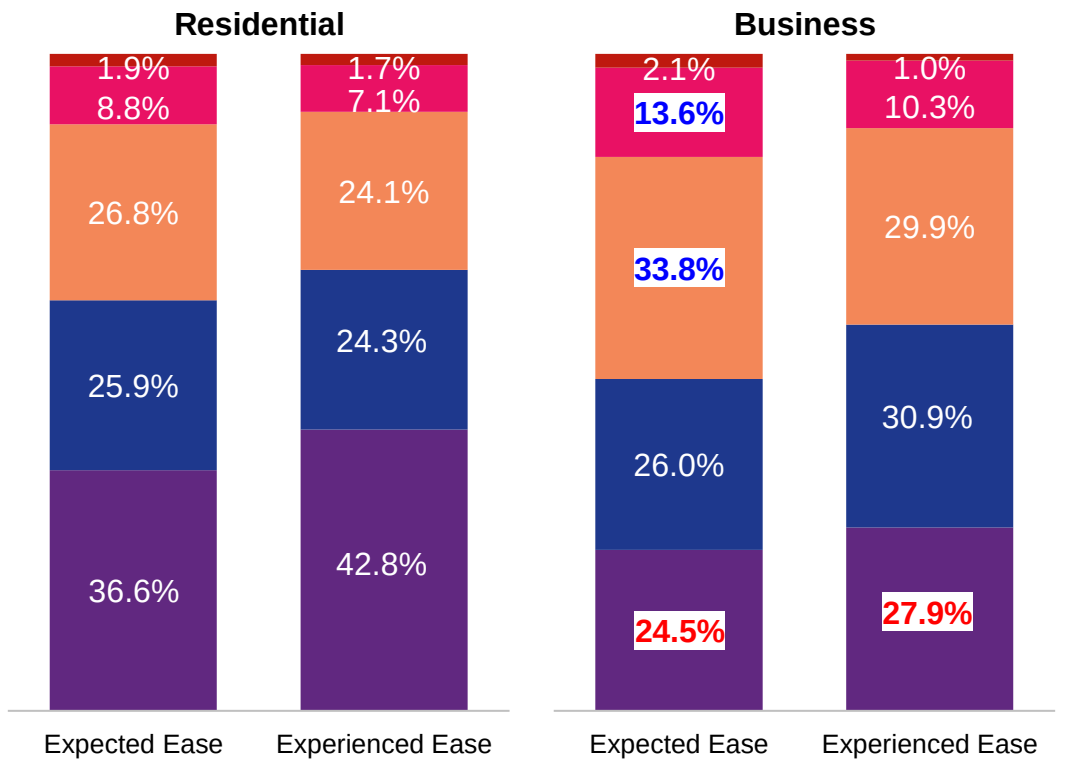
Generally, business customers expected an easier experience than residential customers

- Very Hard – need to contact / provide the same info multiple times, or wait extended period of time for a response
- Hard – need to contact distributor & it is difficult to get required information
- Easy – have to contact distributor / look in more than one place to get result
- Very easy – have to do something but was quick and easy

Expected vs Experience Ease – During Unplanned Outage



Expected vs Experience Ease – During Planned Outage

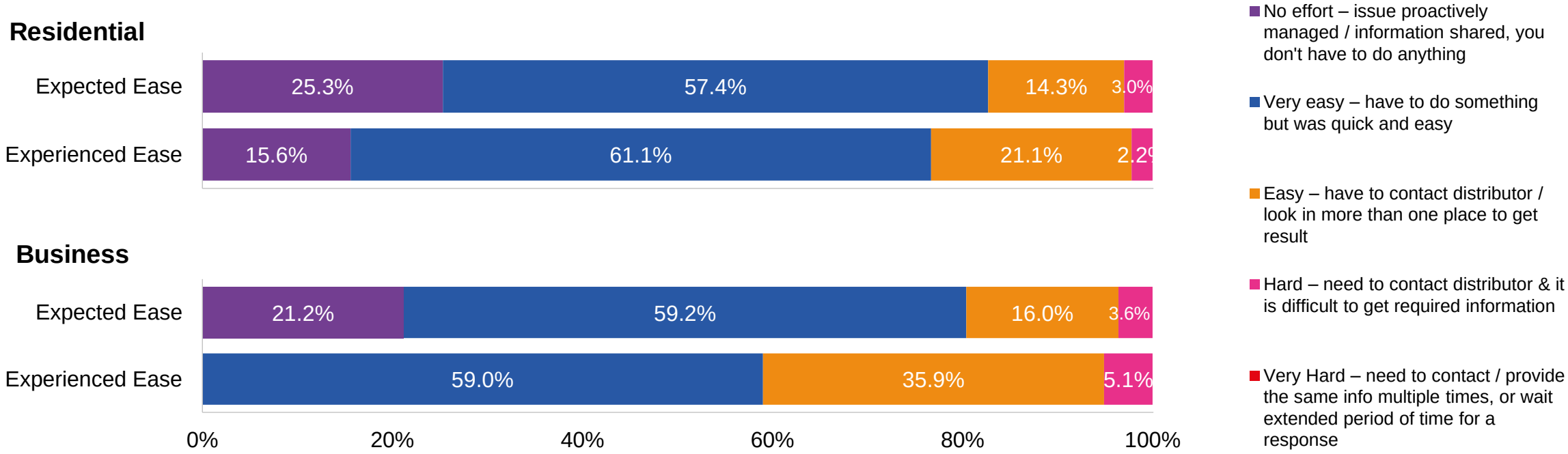


Note: Significance testing was conducted between Residential and Business at the 5% level of significance. Blue indicates that the Business result was significantly higher than the Residential result and red indicates that it was significantly lower.

The experience of a **new project or connection** typically did not meet expectations for business customers

Little differences emerged when comparing expectations vs experience between customers of different networks. However, differences did occur when looking at Business customers compared to Residential. Previous research has shown that it is difficult to satisfy the expectations of business customers. Their time is often directly correlated to their income, and so they expect a higher level of service whilst often being treated similar to regular consumers.

Expected vs Experience Ease – Relating to a project, a request or new connection

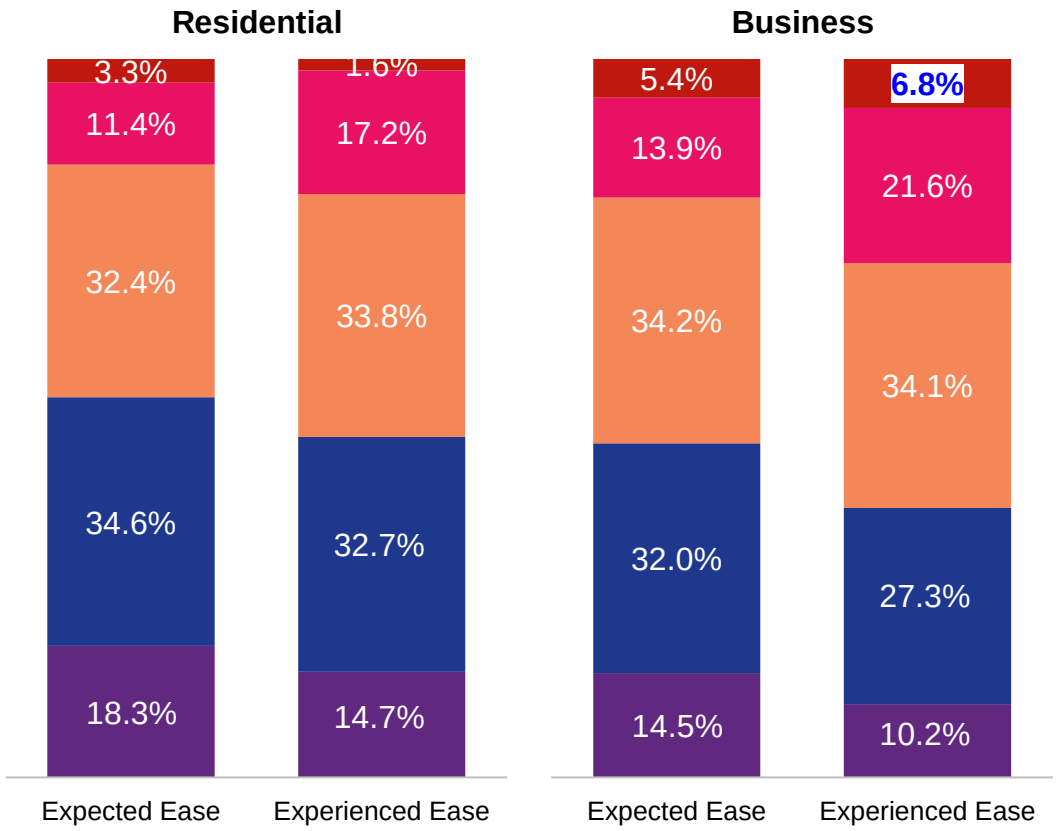


Note: Significance testing was conducted between Residential and Business at the 5% level of significance. No significant differences were found.

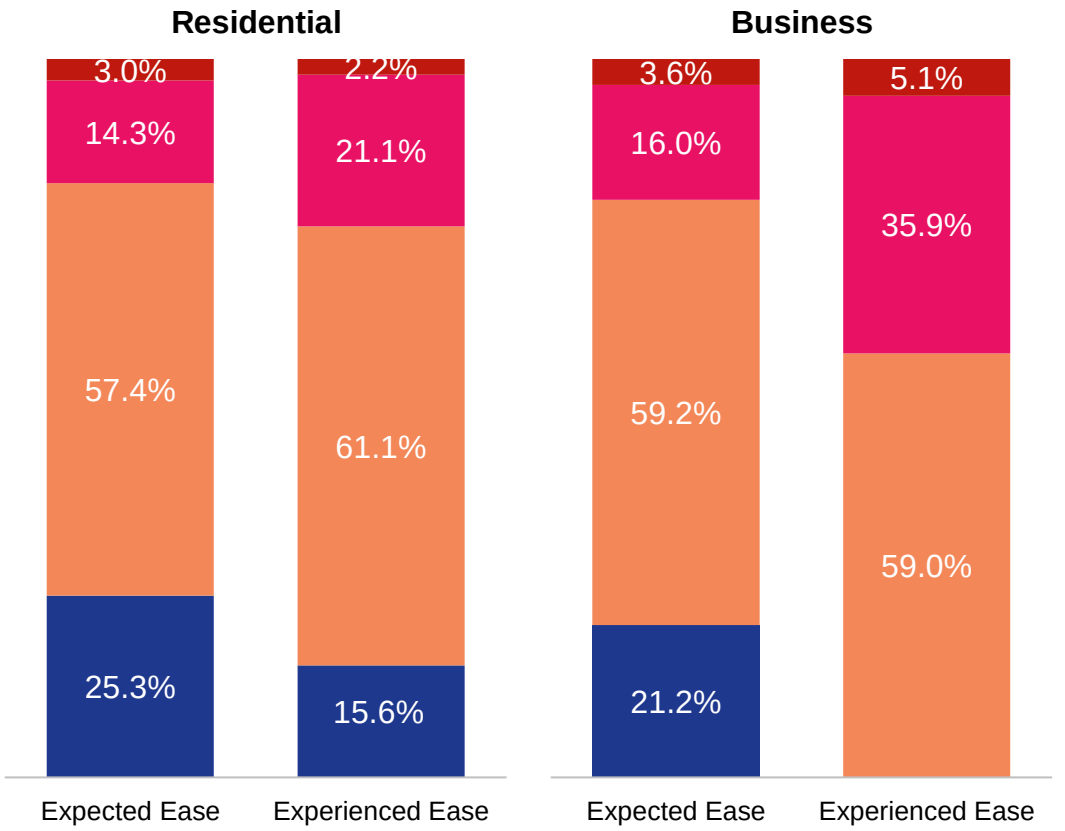
The larger gap between expectation and experience for business customers for key service areas offers an opportunity for targeted improvement

- Very Hard – need to contact / provide the same info multiple times, or wait extended period of time for a response
- Hard – need to contact distributor & it is difficult to get required information
- Easy – have to contact distributor / look in more than one place to get result
- Very easy – have to do something but was quick and easy
- No effort – issue proactively managed / information shared, you don't have to do anything

Expected vs Experience Ease – When contacting a call centre



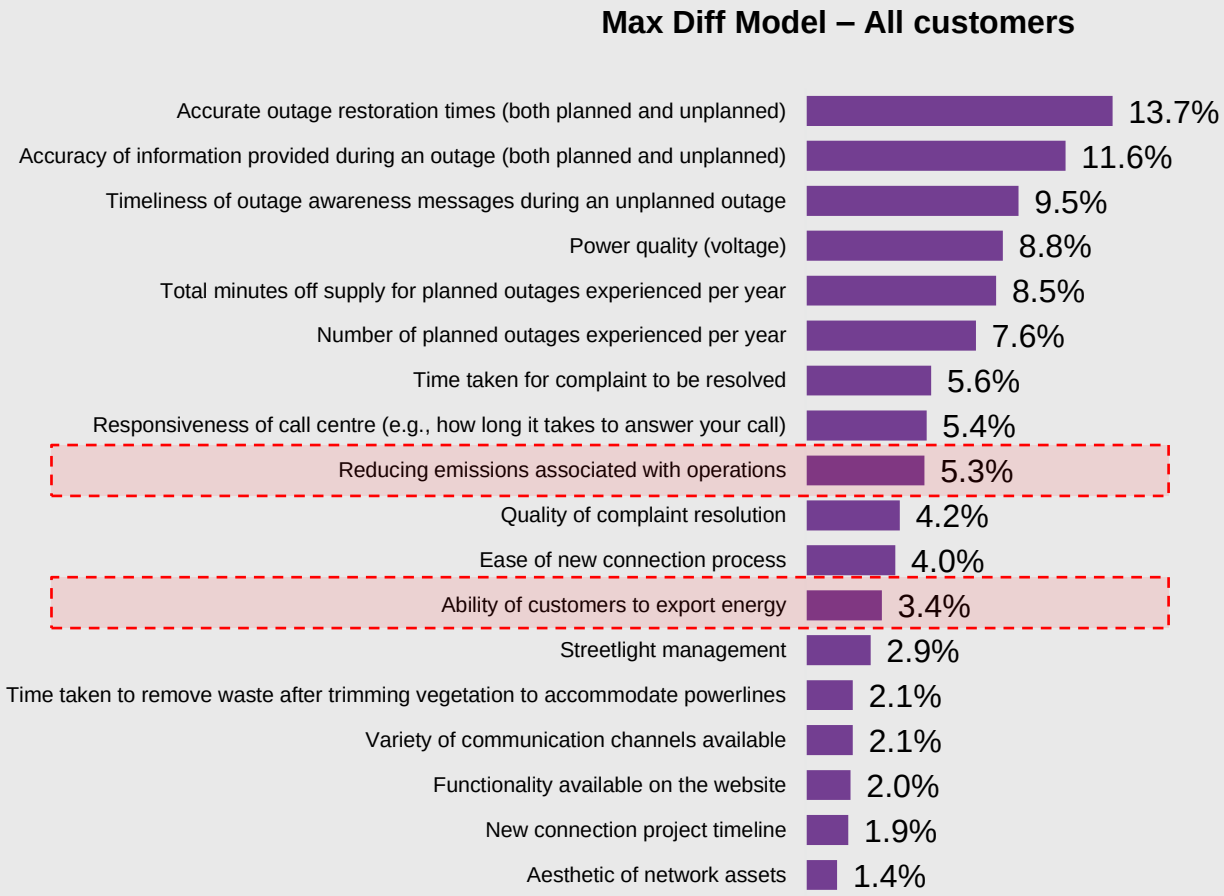
Expected vs Experience Ease – A project, a request or new connection



Note: Significance testing was conducted between Residential and Business at the 5% level of significance. Blue indicates that the Business result was significantly higher than the Residential result.

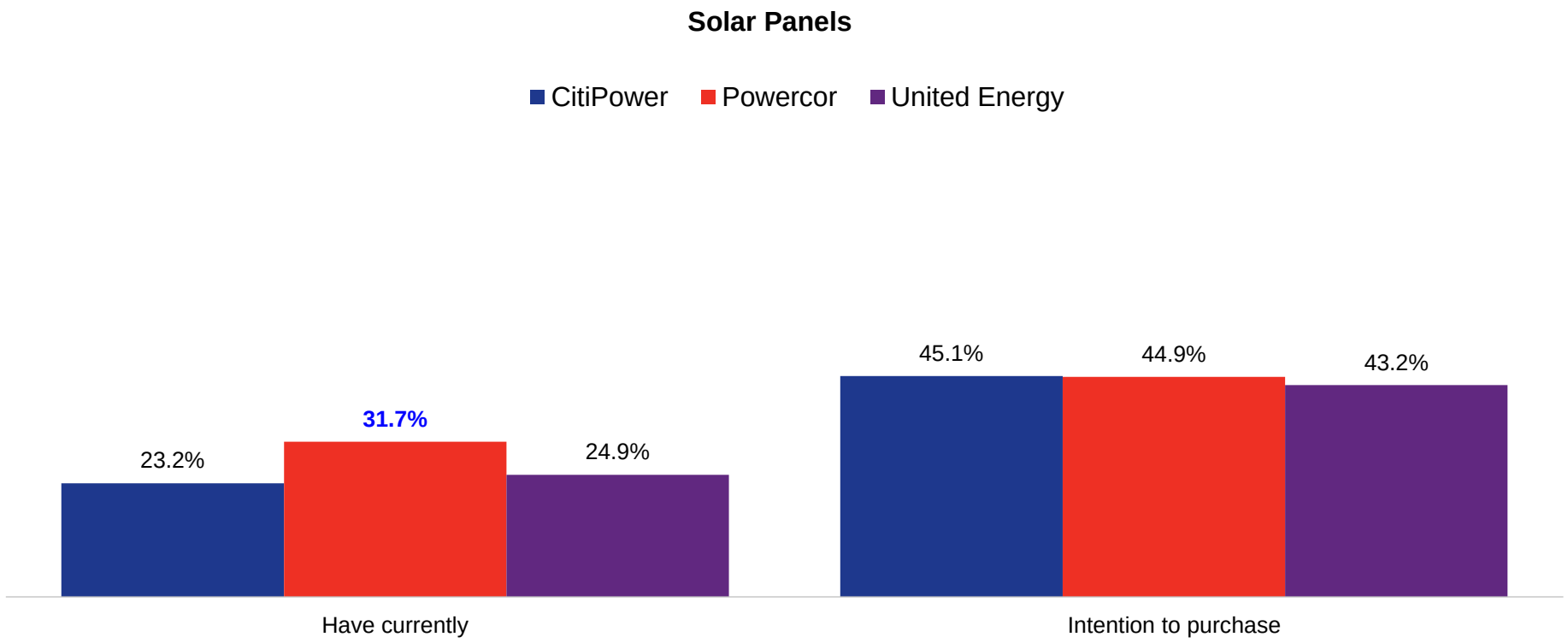
4. Future renewable technologies are emerging as growth priority

- Export services emerged among the top 10 priorities for **Powercor** customers and ranked 12th across **CitiPower** and **United Energy**.
- CitiPower customers prioritised reducing emissions, while customers of Powercor and United Energy, predominantly in regional or rural areas, prioritised reliability and power quality due to existing inequities in basic services.



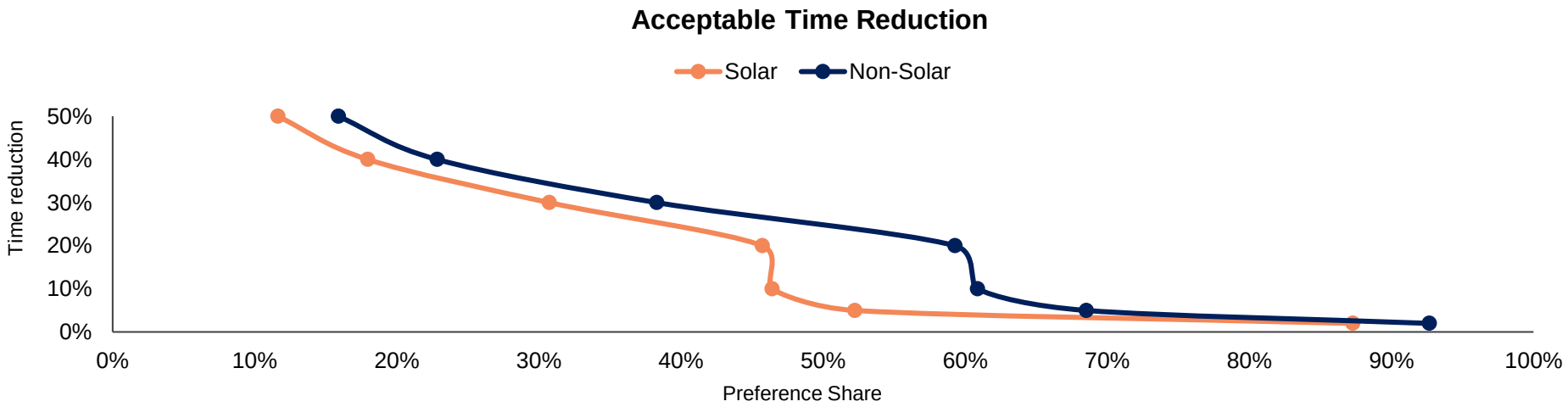
While there were variations among the three networks, the option to export solar power was identified as one of the top 10 priorities for **Powercor** customers and 12th for **CitiPower and United Energy**. Qualitative research conducted in June 2023 showed that customers perceived this service to be increasingly important, given the rising cost of living and the push towards renewable energy.

Almost half of all customers intended to purchase solar panels within the next two years



Note: Significance testing was conducted between CitiPower and the other suppliers at the 5% level of significance. Blue indicates that the other supplier result was significantly higher than the CitiPower result. Multiple responses were allowed for this question, so these results may not sum to 100%.

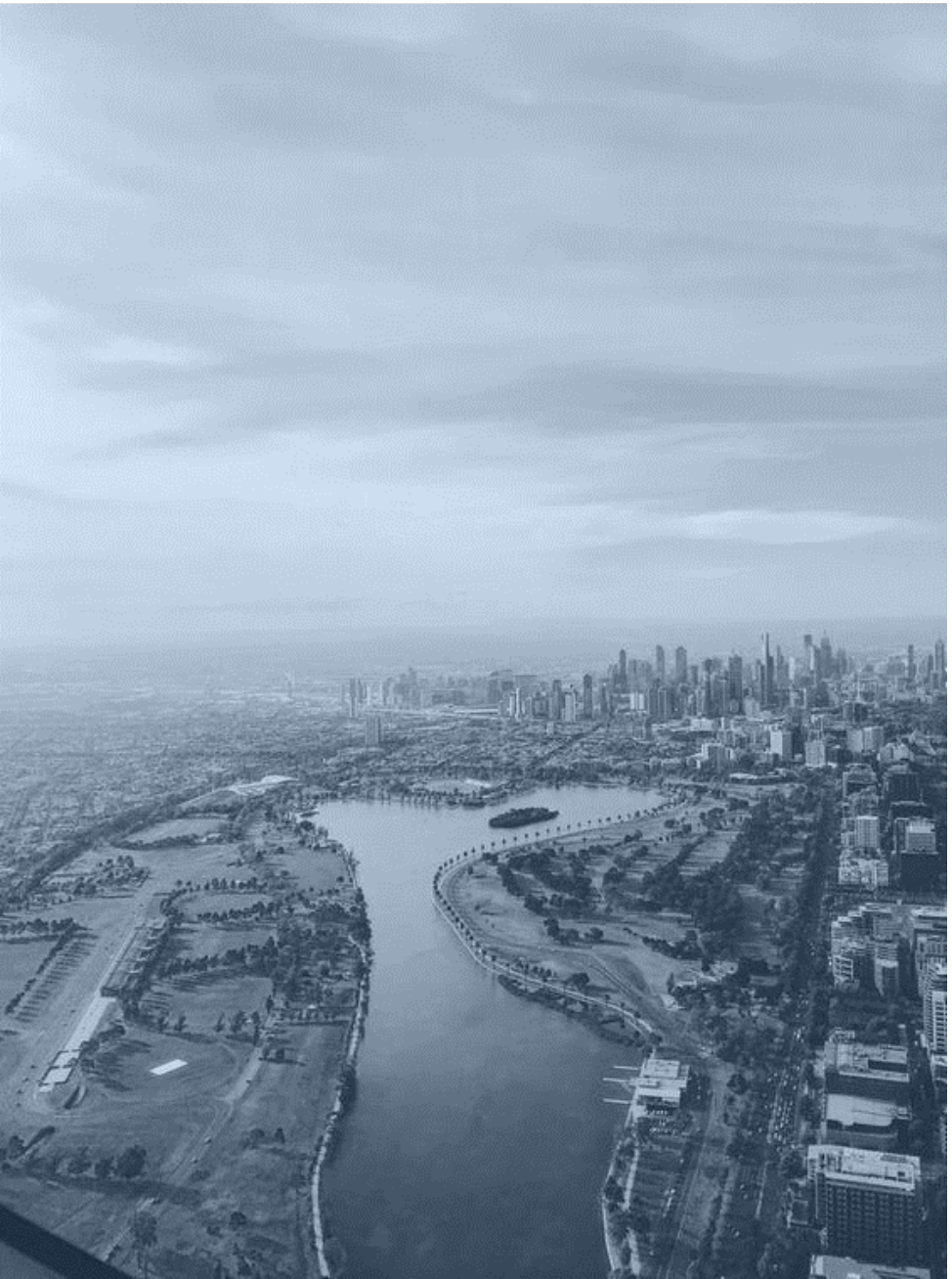
Customers that already have solar had a higher tolerance for the percentage of time their exports were curtailed



Time reduction	Solar		Non-Solar	
50%	11.6%		15.9%	
40%	18.0%	ELASTIC	22.8%	ELASTIC
30%	30.7%	ELASTIC	38.3%	ELASTIC
20%	45.7%	INELASTIC	59.3%	ELASTIC
10%	46.4%	INELASTIC	60.9%	INELASTIC
5%	52.2%	INELASTIC	68.5%	INELASTIC
2%	87.3%	INELASTIC	92.7%	INELASTIC

The difference between solar and non-solar customers can be attributed to multiple factors. Previous research[1] indicates that non-solar customers often had high expectations, believing that adopting solar will lead to benefits such as cost savings. However, the actual experience of solar does not meet these expectations due to factors such as feed-in tariffs and limitations on export limits.

1. Flexible Service Offer Optimisation Research Report, August 2022, Forethought Research



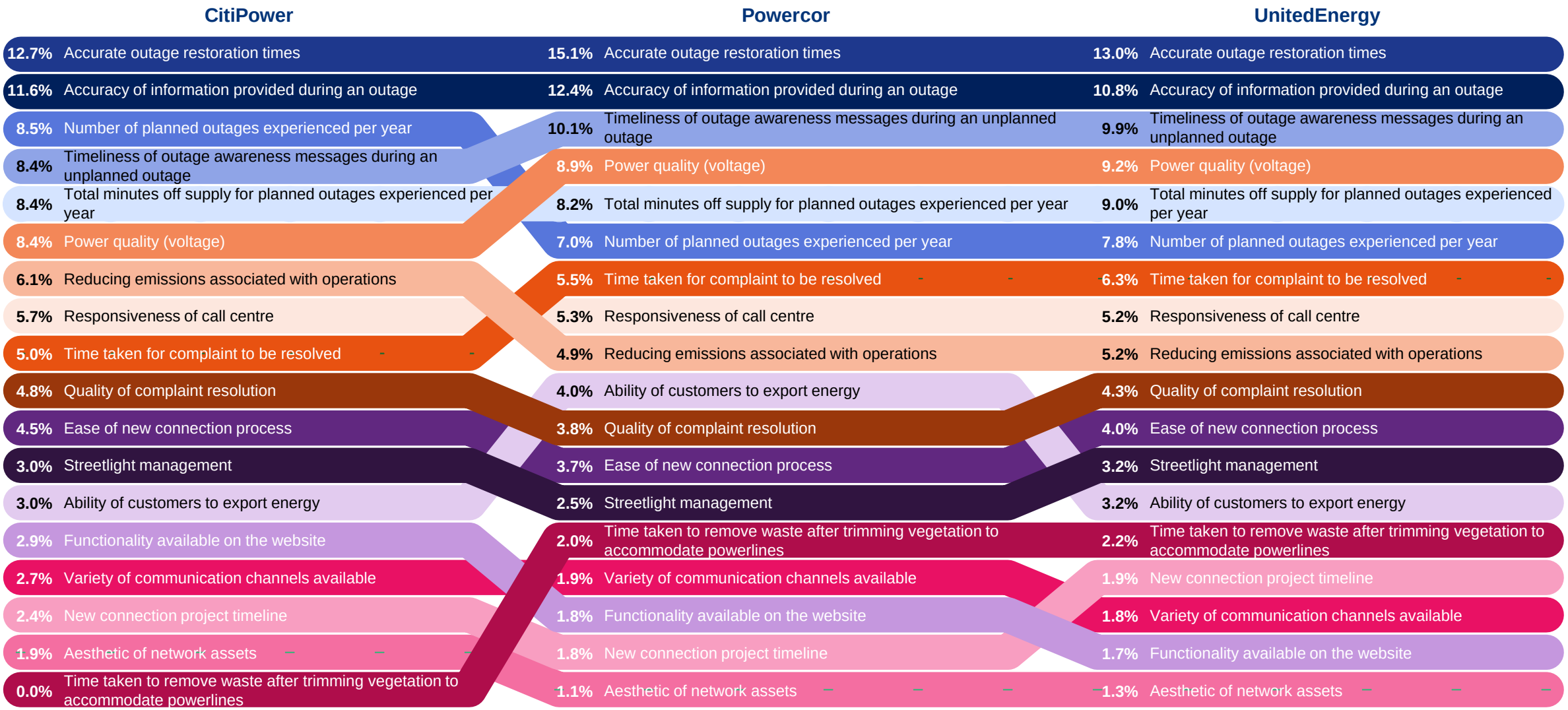
Reducing emissions

CitiPower customers prioritised reducing emissions to a relatively high extent. However, Powercor and United Energy customers, who were predominantly located in regional areas, assign lower importance to this service attribute. Qualitative research indicates that this difference stems from the existing disparity in fundamental services such as reliability and power quality between rural / regional and metropolitan areas. Consequently, rural and regional customers tend to prioritise these types of services over reducing emissions.

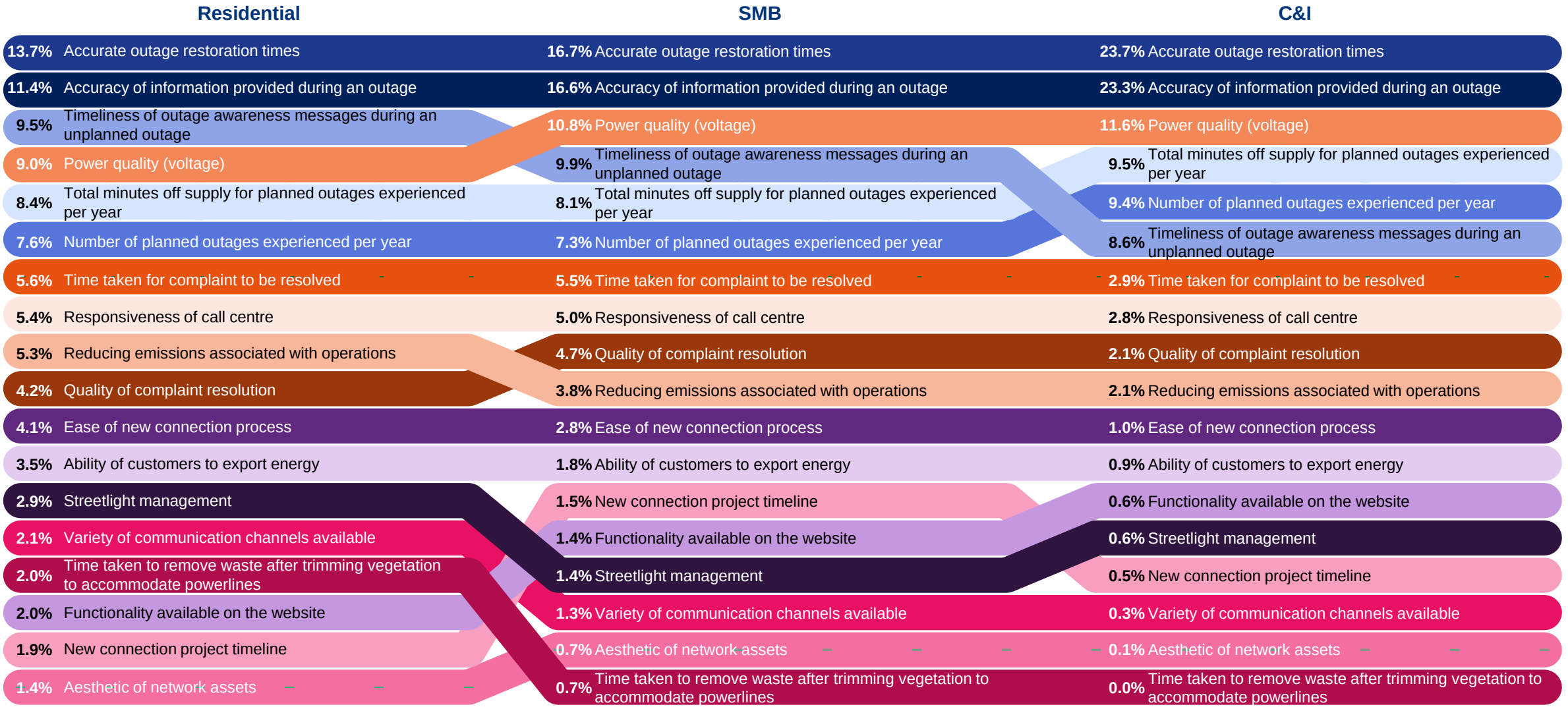
Appendix

*Sample size to be finalised in Phase 1

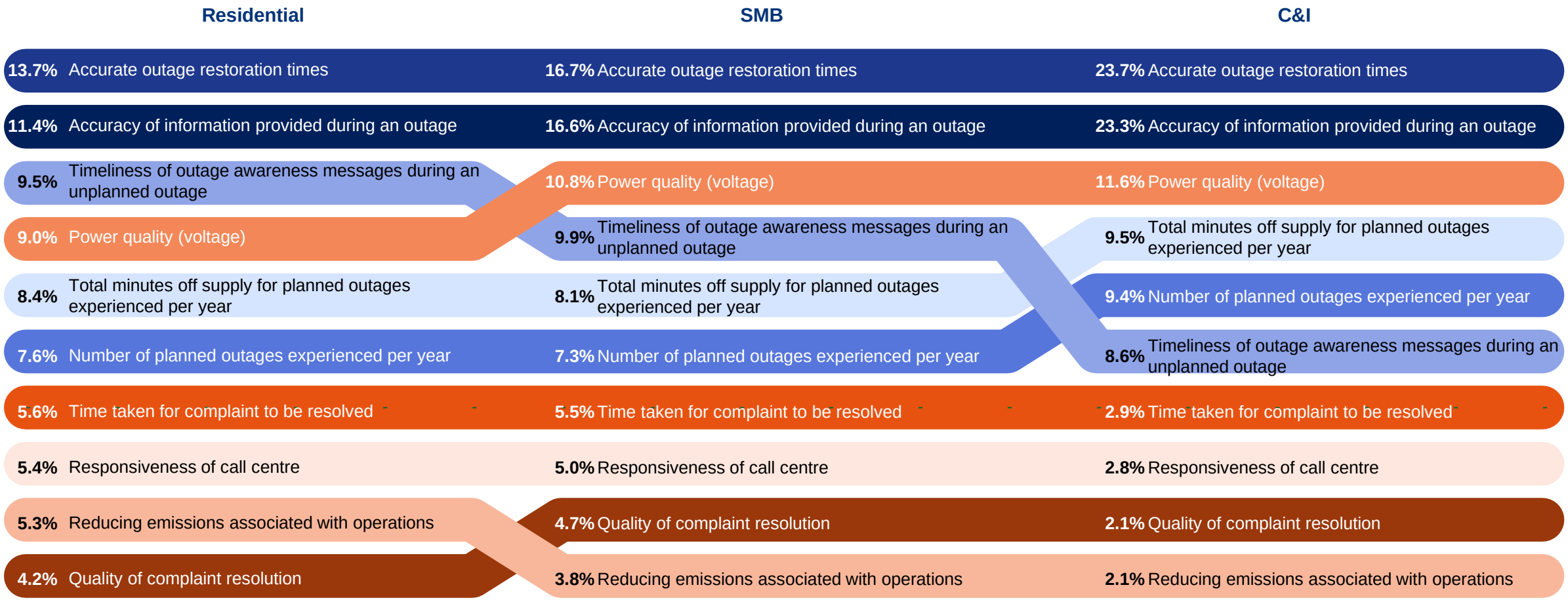
Customer priorities across all customers



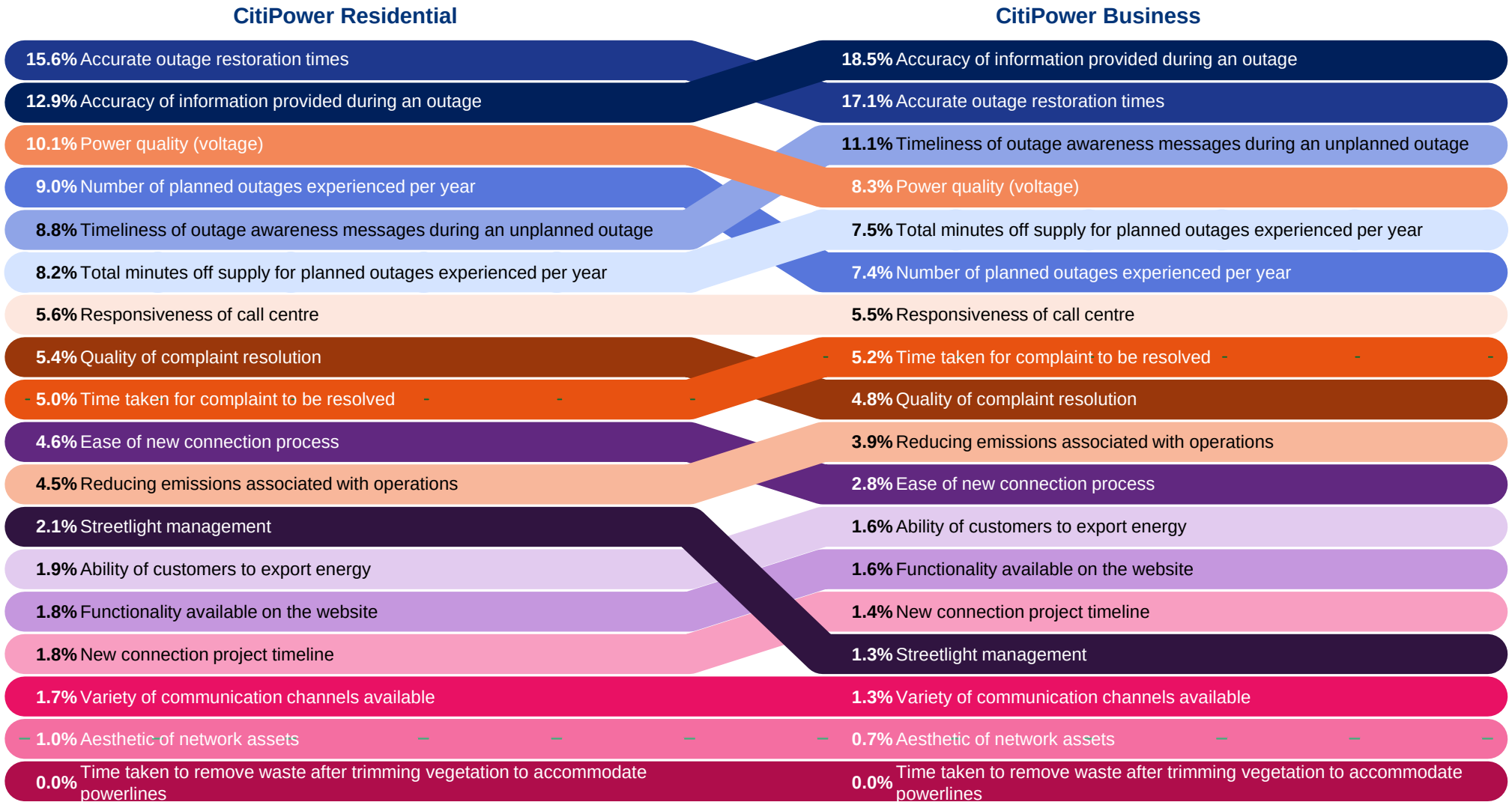
The ranking of attributes differed across customer types



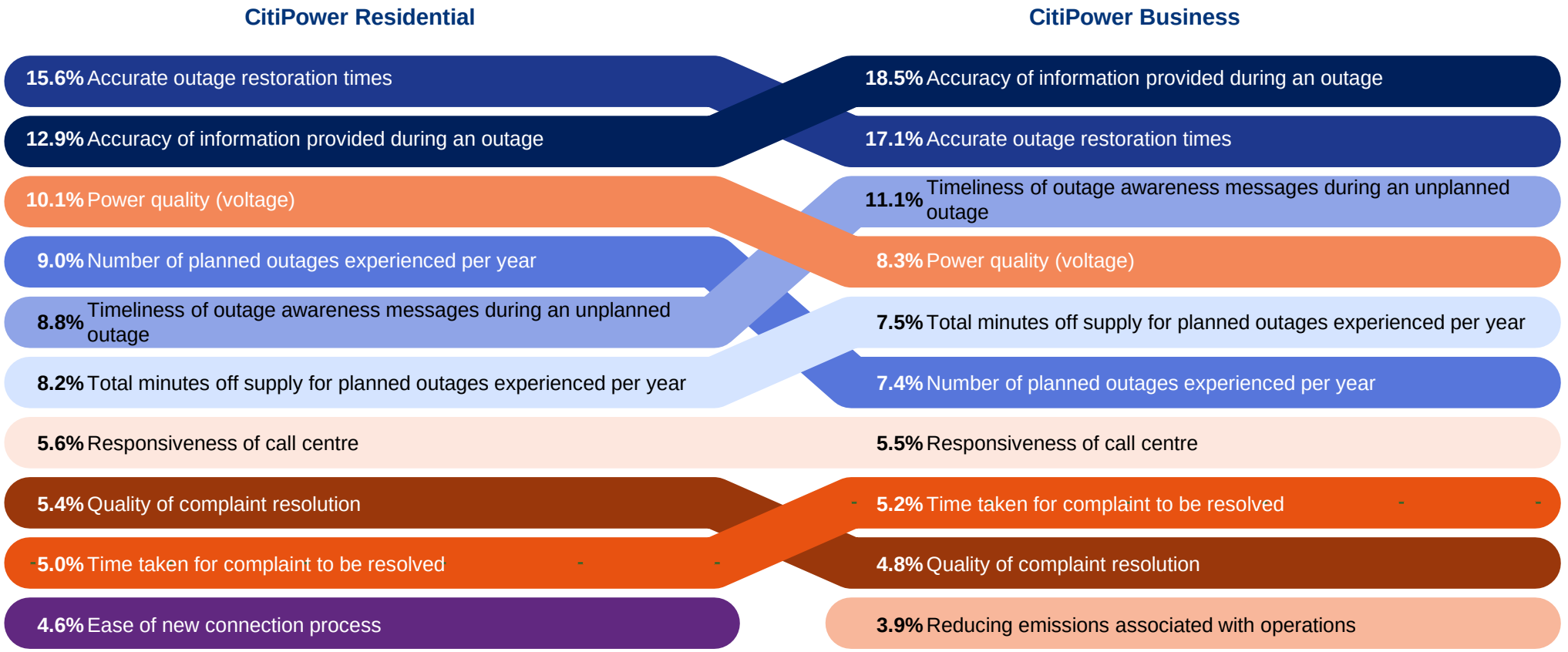
The Top 10 attributes differed in ranking across customer types



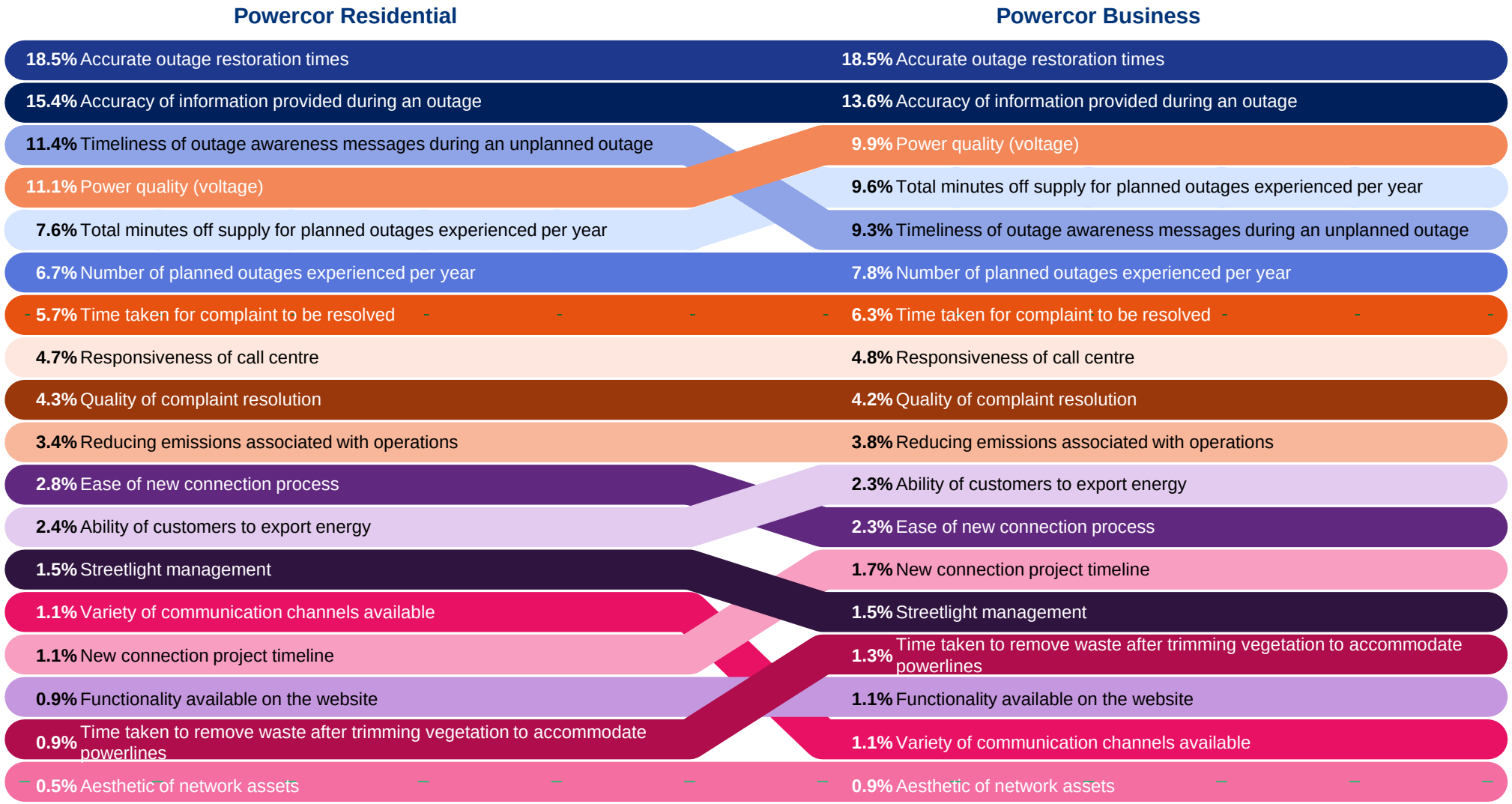
The ranking of attributes differed amongst different CitiPower customer types



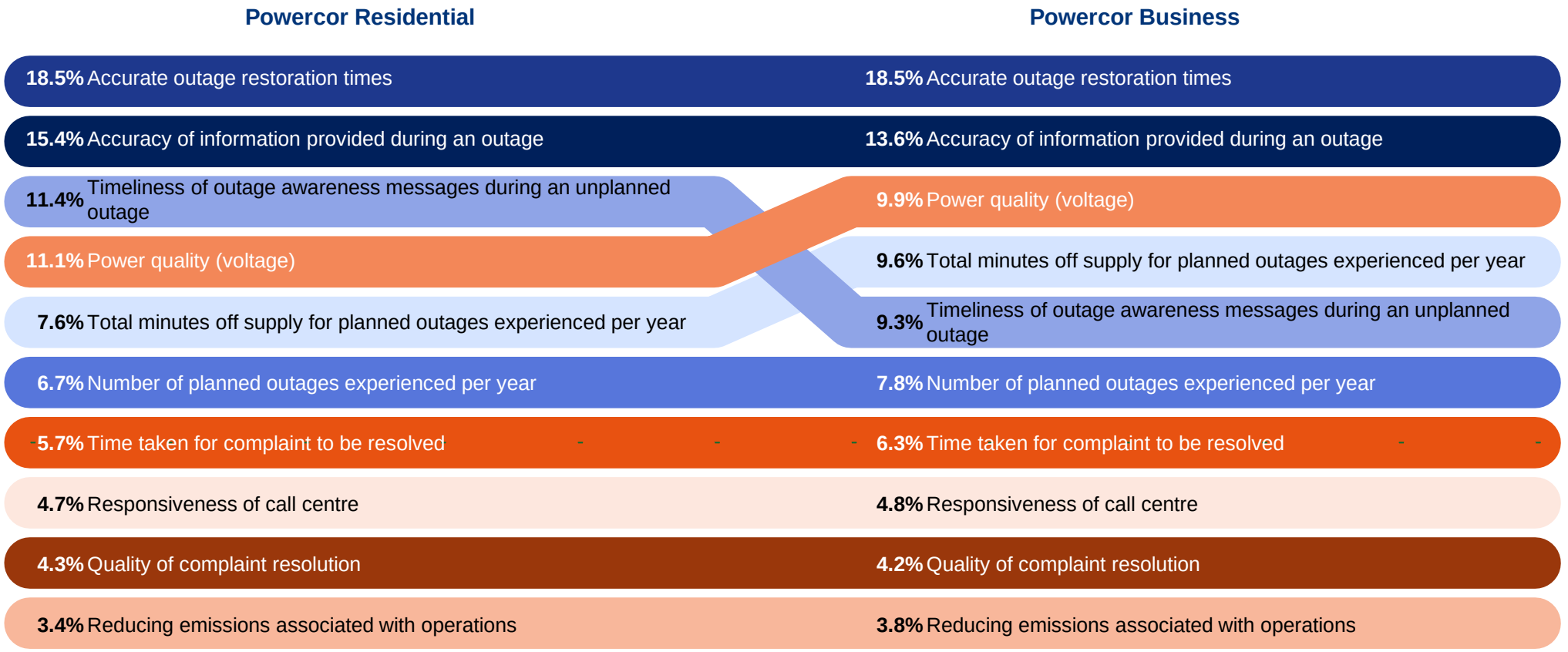
There were differences in the Top 10 ranked attributes across different CitiPower customer types



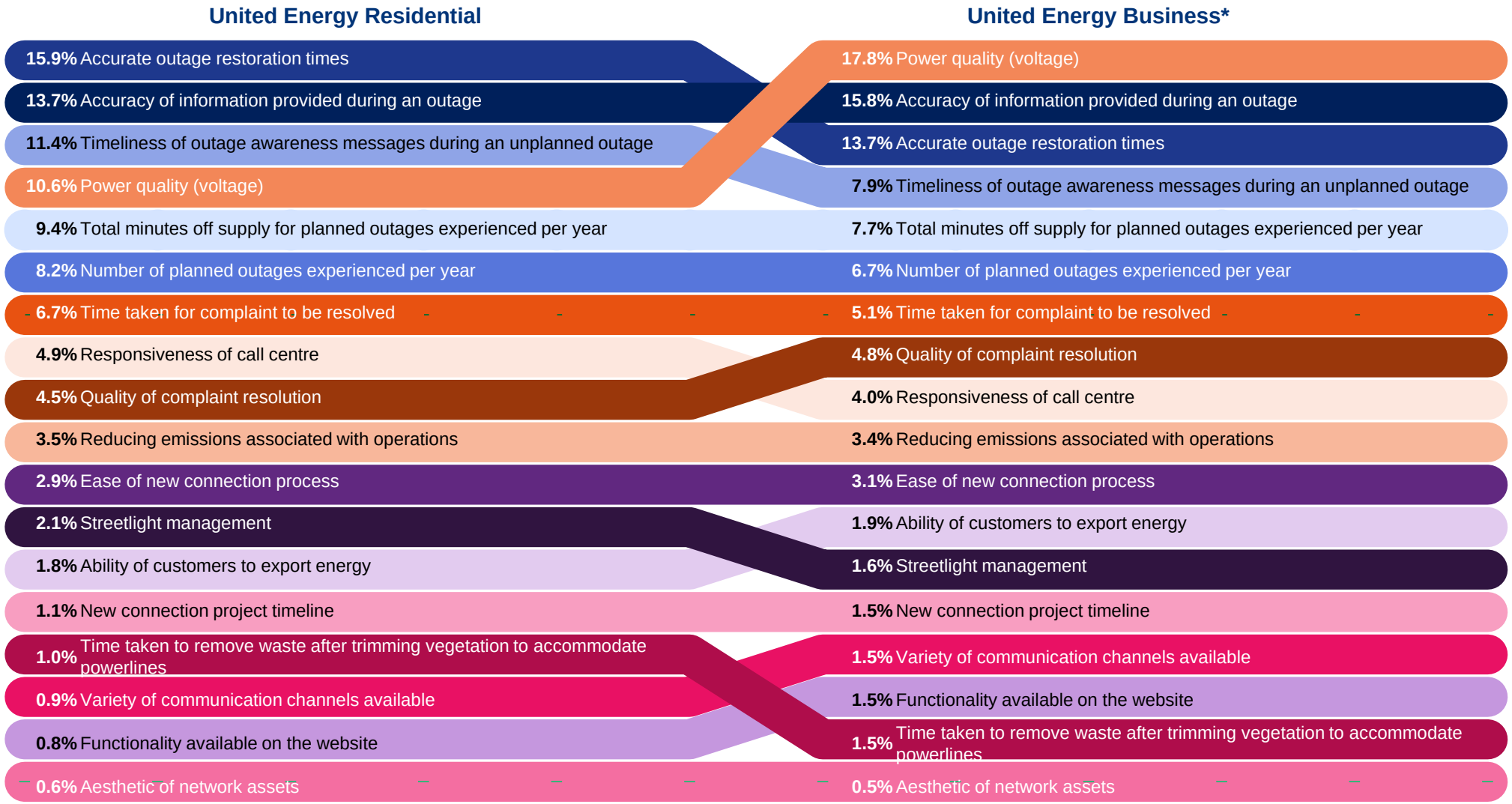
The ranking of attributes different across different types of Powercor customers



The Top 10 attributes differed amongst different types of Powercor customers

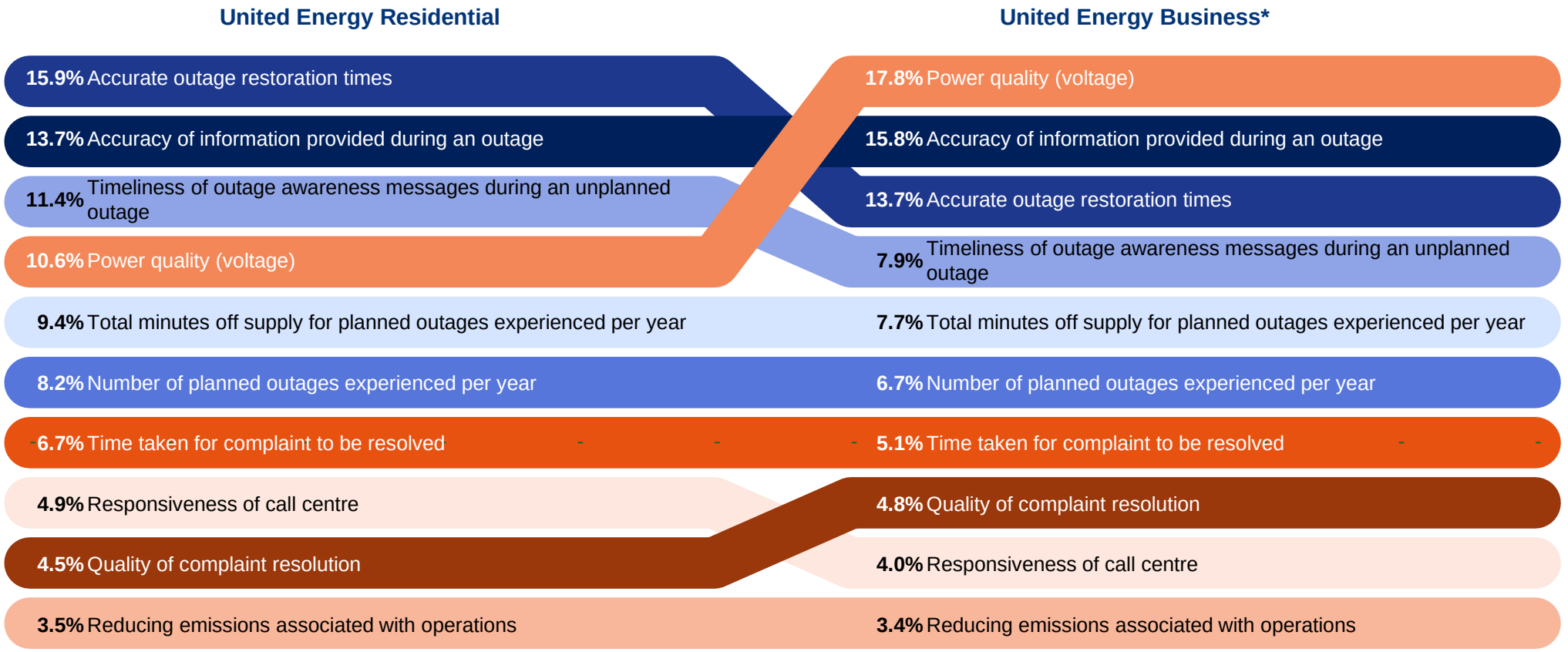


The ranking of attributes differed for different types of United Energy customers



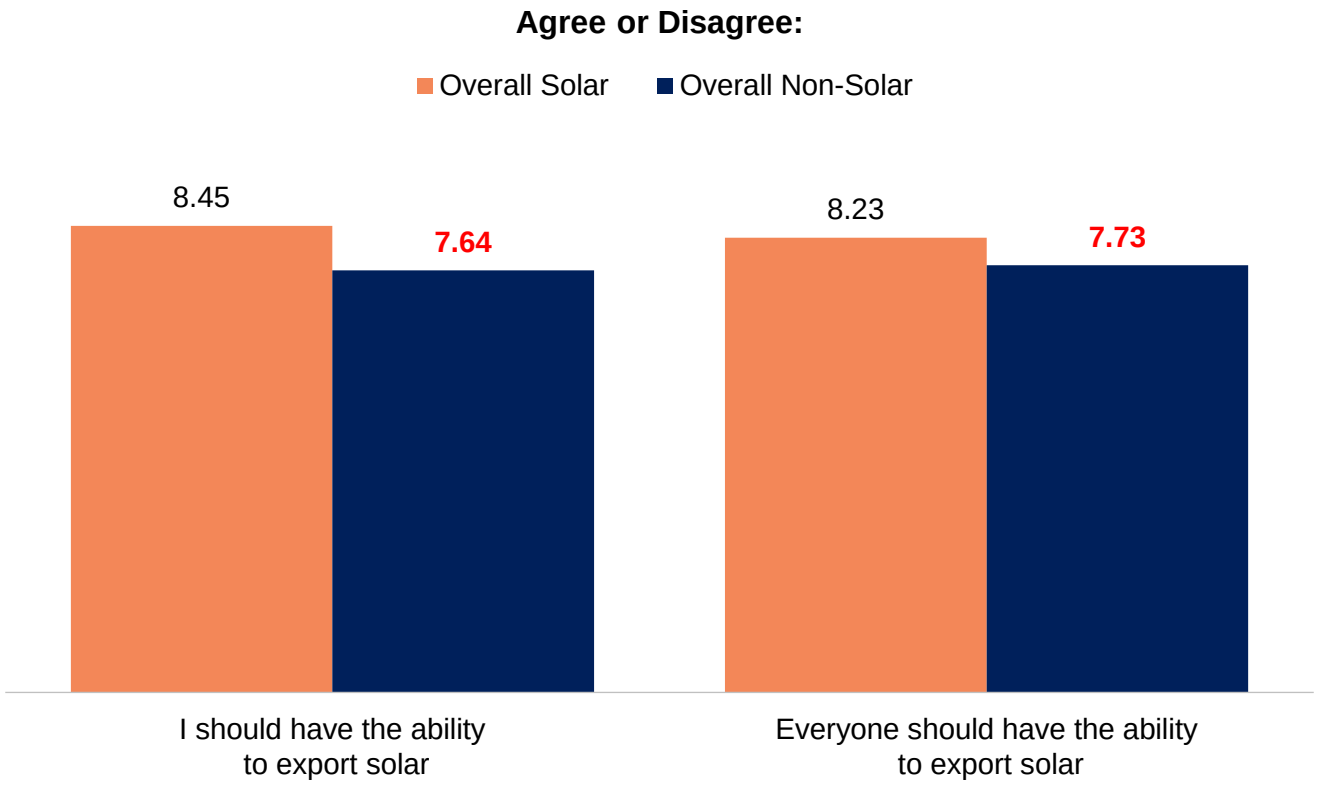
Note: *No sample was collected for C&I within United Energy, so Business results are purely SMB.

The top 10 attributes different across different types of United Energy customers



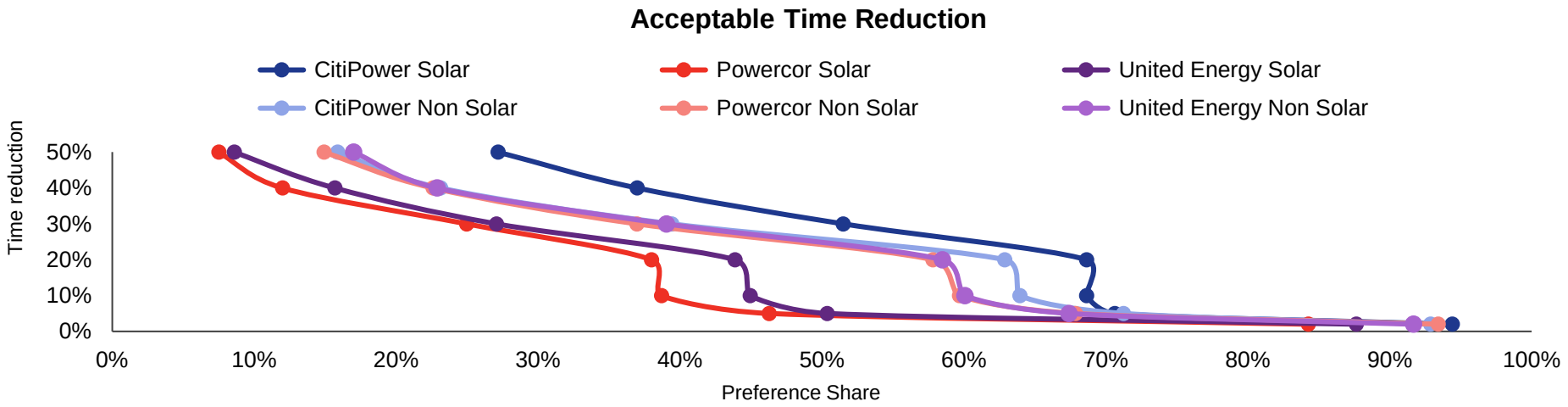
Note: *No sample was collected for C&I within United Energy, so Business results are purely SMB.

Customers with solar agree that people should have access to solar significantly more than non-solar customers



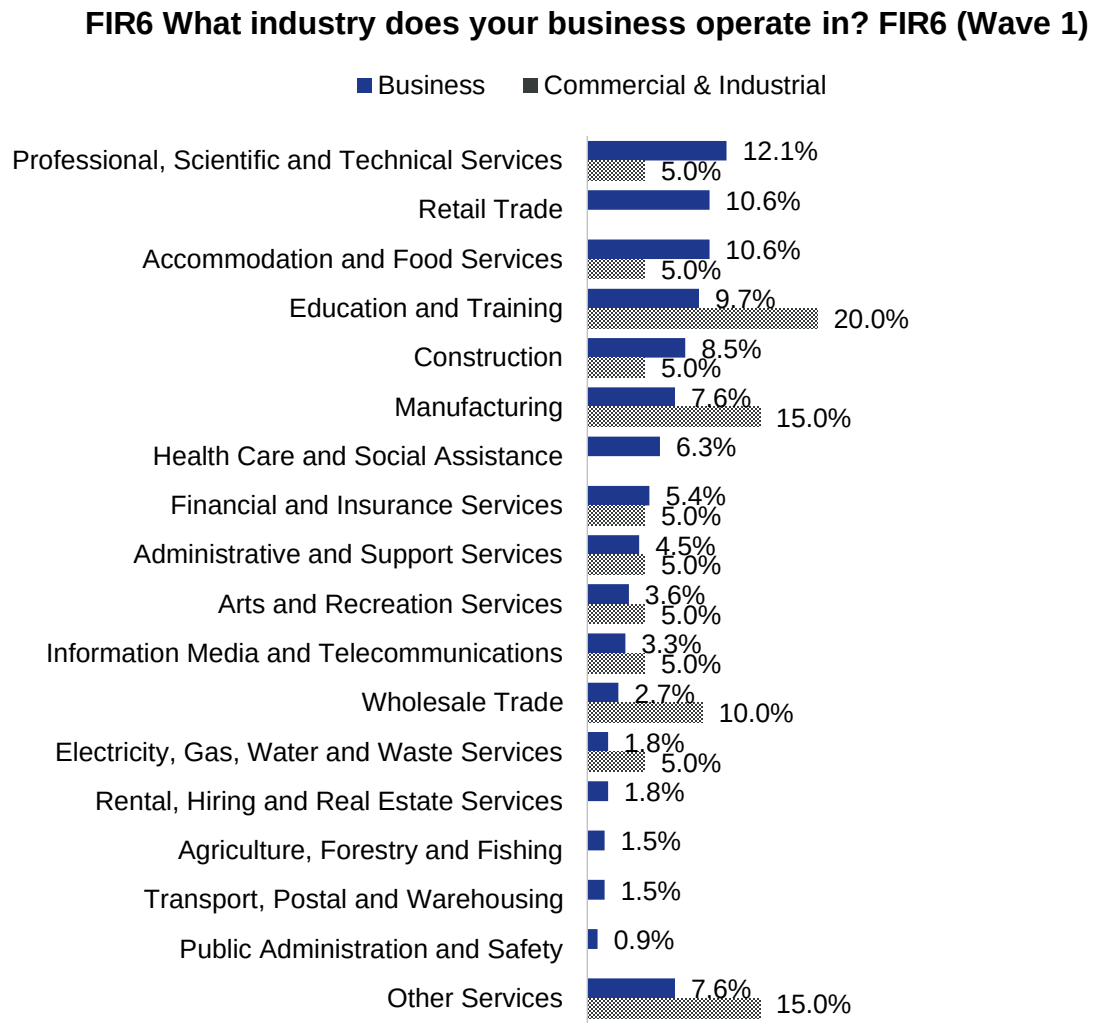
Note: Significance testing was conducted between Overall Solar and Overall Non-Solar at the 5% level of significance. Red indicates that the Overall Non-Solar result was significantly lower than the Overall Solar result.

Acceptable time reduction in export services according to distributor network



Time reduction	CitiPower Solar		Powercor Solar		United Energy Solar		CitiPower Non Solar		Powercor Non Solar		United Energy Non Solar	
50%	27.2%		7.5%		8.6%		15.9%		14.9%		17.0%	
40%	37.0%	ELASTIC	12.0%	ELASTIC	15.7%	ELASTIC	23.1%	ELASTIC	22.6%	ELASTIC	22.9%	ELASTIC
30%	51.5%	ELASTIC	25.0%	ELASTIC	27.1%	ELASTIC	39.4%	ELASTIC	37.0%	ELASTIC	39.0%	ELASTIC
20%	68.6%	INELASTIC	38.0%	ELASTIC	43.9%	ELASTIC	62.9%	ELASTIC	57.8%	ELASTIC	58.5%	INELASTIC
10%	68.6%	INELASTIC	38.7%	INELASTIC	44.9%	INELASTIC	63.9%	INELASTIC	59.7%	INELASTIC	60.1%	INELASTIC
5%	70.6%	INELASTIC	46.3%	INELASTIC	50.4%	INELASTIC	71.2%	INELASTIC	67.9%	INELASTIC	67.4%	INELASTIC
2%	94.4%	INELASTIC	84.3%	INELASTIC	87.6%	INELASTIC	92.9%	INELASTIC	93.4%	INELASTIC	91.7%	INELASTIC

Industry of business / C&I respondents



Note: Shaded bars indicate results based on small sample sizes. A minimum sample size of n=30 is recommended for an indicative result.

Is there anything else important to you?

Timeliness, accuracy and reliability	Customer support and communication	Sustainability and solar capability	Transparency around price
• *"Timely and accurate information and restoration of power"* – Powercor Residential Consumer • *"That outages must be fixed in a* timely manner and as quickly as possible. I once had a blackout *for 13 hours straight and it wasn't* fair - I had really felt that *Powercor didn't really care"* – Powercor SMB	• *"All about communicating with the customer."* – Powercor Consumer • *"More frequent communications* from the distributor to the end *user!"* – United Energy Residential Consumer	• *"I would like to know how the* distributor reduces its carbon *footprint"* – CitiPower SMB • *"We find that the feed in tariff has* been reducing over the years and worried what will be the outcome *for us solar users!!!"* – United Energy Residential Consumer	• "Them being honest & upfront *with their prices."* – Powercor Residential Consumers • *"Transparency with prices is important"* – CitiPower Residential Consumer

Many participants also said that there was nothing else, beyond the options presented in the survey, that was important to them.

*Sample size to be finalised in Phase 1

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