

Endeavour Energy

Residential and SME Customer Quantitative Research

**Revenue Reset (2024-2029)
Final Report**

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Energy**

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Purpose and Methodology

Purpose and Engagement Approach

Endeavour Energy's engagement approach was co-designed with stakeholder representatives from the Regulatory Reference Group (RRG) as well as Endeavour Energy's Board and Executive. See the next slide for details.

Engagement with residential and SME customers has included:

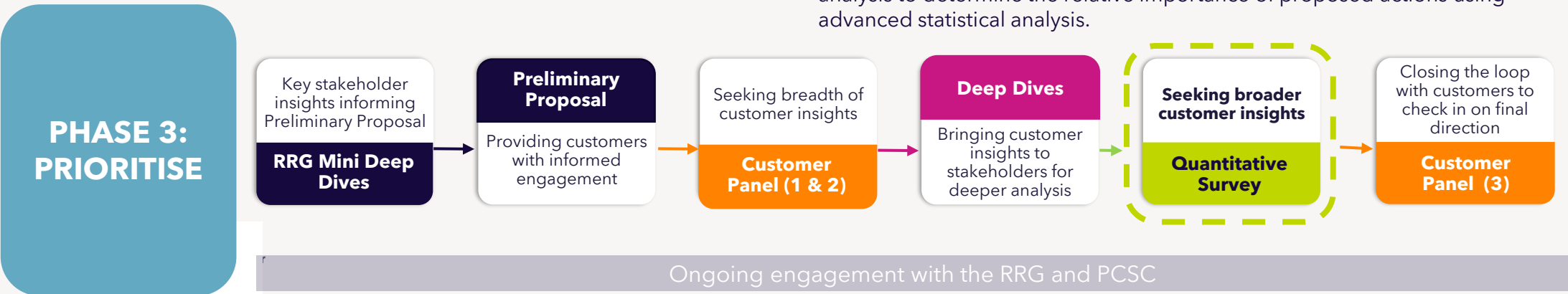
- The 'Discovery' phase in August and September 2021, 11 focus groups with residential customers and 4 focus groups with SME customers as well as 4 in-language discussions with Assyrian small business owners.
- In the 'Explore' phase, a RepTrak survey amongst residential customers with a sample of n=500.
- In the 'Prioritise' phase, a Customer Panel comprising 65 residential and 24 SME customers who engaged over 15 hours in May, June and September 2022.
- **This quantitative study provides additional breadth of engagement with residential and SME customers.**

The diagram below shows how the engagement activities in the 'Phase 3: Prioritise' program from May to October 2022 are providing Endeavour Energy with the customer and stakeholder feedback necessary to share a Draft Proposal for submission to the Australian Energy Regulator (AER) in October 2022. The full engagement approach is detailed on the following page.

The **objectives** of the Quantitative Survey are to:

- Deliver 'breadth' of residential and SME customer opinion through a statistically representative measure of opinions, attitudes and preferences on key issues where Endeavour Energy felt an additional 'pillar of evidence' would be useful to inform its regulatory proposal.
- Understand how opinions, attitudes and preferences differ among different types of customers e.g. residential vs. business, by areas of the catchment, age group, household size, energy usage, owners vs. renters and so forth.

The survey question line also included ratings for their concerns with electricity related issues, knowledge and sentiment towards Endeavour Energy, rating the performance and importance of current and future services and a Max-Diff analysis to determine the relative importance of proposed actions using advanced statistical analysis.



Preparation

Oct 2020 - Mar 2021

Phase 1: Discover

Apr 2021 - Sept 2021

Phase 2: Explore

Oct 2021 - Apr 2022

Phase 3: Prioritise

May 2022 - Oct 2022

Phase 4: Refine

Nov 2022 - Jan 2023

Benchmarking previous engagement with best practice

Engagement partner appointed

PCSC membership enhanced

Establishment of RRG, FGRG and ReRG and determine TOR

Board / Executive / Customer co-Design Workshop

RRG Engagement Planning

Joint DNSP Engagement (Emerging Services)

Future Grid

Co-designed Exploratory Research Strawman

Board Check-In

PCSC

Exploratory Research - Residential

Exploratory Research - SME (Dinners with Endeavour)

Exploratory Research - CALD

Ongoing engagement with AER

RRG & AER Investment Value Framework

BAU State of the Network Forum - Illawarra and South Coast

BAU State of the Network Forum - Western Sydney

High Energy User Workshop

Future Grid Workshops

Retailer Reference Group

PCSC x 2

Joint DNSP Engagement (Tariffs)

Ongoing RRG mini deep dives

Board Check-In

Commence engagement of AER's Consumer Challenge Panel (CCP)

Ongoing engagement with AER

1:1 briefings with stakeholders

RepTrak benchmarking study

Local Council Workshop - Illawarra and South Coast

Local Council Workshop - Western Sydney

Customer Panel Wave 1

Customer Panel Wave 2

Deep Dive 1

Deep Dive 2

1:1 briefings with stakeholders

Quantitative Survey

Retailer Reference Group x 3

PCSC x 3

Ongoing RRG mini deep dives

In-language direct engagement with CALD communities

Customer Panel Wave 3

Ongoing engagement with AER

RepTrak benchmarking study

Stakeholder check-ins

Individual retailer engagements

Local Government streetlighting tariffs check-in

RRG bi-monthly meetings

Engagement Theme

- Safe, Affordable, Reliable
- Growth
- Resilience
- Energy Choice

Key Deliverables

Engagement Plan

Exploratory Customer Research Report

Preliminary Proposal

Business Narrative

Draft Proposal

Draft Proposal Customer Overview

Final Proposal


Final Proposal Customer Overview

Quantitative Methodology

- A **20-minute online survey** was conducted in August 2022 with a representative sample of Endeavour Energy's customers.
- The survey achieved a **total sample size of n=1,266**, which included n=1,001 residential customers and n=265 small business customers across the network.
- Quotas were set to reflect actual population proportions in each of the three regions; North-western Sydney and Blue Mountains, South-western Sydney and Southern Highlands, and Illawarra and South Coast. The residential sample also included an excellent mix of customers by age and gender and the business sample included a mix of different business sizes.
- Participants needed to be 18+ and the main or joint decision maker when it came to choosing an electricity company for their home or business. Business participants were also required to have less than 200 employees and be small to medium energy users (using bill amount as a proxy, with estimated bills less than \$7,250 per quarter). The sample was sourced through a professional market research panel, *CanvasU*.
- Data was weighted at the analysis stage to reflect the actual proportion of residents across age, gender and location based on the latest statistics available from the Australian Bureau of Statistics.

The tables below show the breakdown of the total customers who completed the survey, by key demographics and segment:

Catchment area

	North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Total
Region				
Residential	517	281	203	1,001
SME	143	102	20	265
Total	660	383	223	1,266
Age				
18-34	257	208	93	558
35-49	218	103	60	381
50-64	110	52	36	198
65+	75	20	34	129
Gender				
Male	281	174	68	523
Female	379	209	155	743
Business size (among business customers as measured by number of employees)				
Less than 20	114	81	14	209
20-199	29	21	6	56

Refer to Appendices for more detailed demographic information.

Methodological Notes to the Reader



This report presents the findings of a quantitative survey with a sample of Endeavour Energy’s residential and SME customers.

Results have been presented for total residential customers and total SME customers and reflect the weighted proportions. Any segment differences are noted in the commentary with more detail shown in the Appendices.

Any statistically significant differences reported are at the 95% confidence level. Statistically significant differences have been noted across demographic and behavioural sub-groups, where meaningful in the context of the question and relevant to the objectives of the study. Where differences have not been discussed, it should be assumed that no differences existed or were noteworthy.

In interpreting the findings, please note:

- Results may not always total 100% due to rounding. For multiple response questions, results may add up to more than 100% as respondents may have given more than one answer.
- To ensure data reliability, results are typically only shown when the sample sizes are at least n=30.
- Throughout the report the term ‘NET’ has been used to group response options into one overarching theme e.g. ratings of somewhat positive or very positive were NET Positive.

Key segments:

Segment	Definition	Proportion (Weighted)	
		Residential (n=1,001)	SME (n=265)
Financially vulnerable	For Residential customers: describe their current financial situation as ‘having some difficulty but just making ends meet’ <u>or</u> ‘having a lot of difficulty making ends meet’ <u>or</u> ‘I have a special payment arrangement with energy provider due to financial difficulty’. For SME customers: any of the above regarding their business’ financial situation <u>or</u> in the last twelve months have ‘had to reduce staff hours or shifts due to financial difficulty’ <u>or</u> ‘had to lay off staff due to financial difficulty’.	28%	22%
Culturally and Linguistically Diverse (CALD)	They ‘speak a language other than English at home or with close family members’	18%	9%
Aboriginal and Torres Strait Islander (ATSI)	They ‘identify as Aboriginal or Torres Strait Islander’	4%	6%
Innovator	If an energy company or other service provider offered a new technology or innovative service, they say they ‘would probably be one of the very first to know about and try it.’ This technology adoption question groups customers into segments along a spectrum based on openness to adopt. Segments also include Early Adopters, Early Majority, Late Majority and Laggards.	7%	25%

Detailed results of key questions are shown by these (and other) key segments in the Appendices.



Executive Summary

Baseline concerns, knowledge and sentiment

The cost of electricity is one of the most concerning issues for residential customers and the majority are more concerned than they were 12 months ago

- When asked to rate their level of concern about a broad range of issues, residential customers were most concerned about the cost of living (77% were very or extremely concerned), closely followed by the cost of electricity (67%) and the economy (63%). One in two residential customers (49%) were very or extremely concerned about being able to afford to pay their electricity bills.
- Compared to residential customers, fewer SMEs were strongly concerned about the cost of their electricity (47%). They rated the economy, climate change and supply chain issues as more concerning. The issues of electrical safety, the ability to afford their electricity bills and the reliability of their supply were lower order issues for SMEs, although around two in five were strongly concerned.
- For both residential and SME customers, reliability and safety issues are of less concern than the cost of electricity and bill affordability. This echoes the qualitative research which found that most customers are comfortable with current levels of reliability and don't think much about safety issues. Note however that results show that reliability is a key priority in terms of current and future services.

Although unprompted knowledge of Endeavour Energy is quite low, most customers are broadly positive towards it once they know what the organisation is and does

- Eight in ten residents (80%) say they have heard of Endeavour Energy but only 14% of these say they know a lot or a fair bit about it. While SMEs are less likely to say they know who Endeavour Energy is (58%), those who are aware of it are more likely to say they know a lot or fair bit about it (35%) compared to residential customers.
- After being shown information about Endeavour Energy, more than half (56%) of residential participants held a positive opinion and levels of positivity increased to nearly nine in ten (86%) among SME customers. Most of the remainder were unsure, with only 3% of residential customers and 1% of SME customers feeling negative.
- Modelling of Endeavour Energy's performance in delivering its current services against overall perceptions shows that sentiment among residential customers is largely driven by safety related issues and managing the network efficiently. For SMEs the biggest drivers were tools to help manage electricity usage and reading electricity meters.







Perceived performance of Endeavour Energy in delivering its current services is fairly positive, although a significant proportion of residents are not sure about many of them

- Residential customers rated 'the reliable supply of electricity' as the best performing service attribute (61% rated this good or excellent). 'Maintaining streetlights' (57%) and 'responding to emergencies' (57%) were also rated quite high. Notably, a fair proportion of customers were not sure about the various service levels, particularly around 'helping vulnerable customers' (30% could not rate this aspect) and 'answering emergency telephone calls' (37%).
- SMEs provided higher performance ratings for current services across the board and were far less likely to select 'don't know'. 'Responding to emergencies' was the highest rated service (73% good or excellent), closely followed by 'safety related issues' (70%).

Current and future service priorities






When prioritising Endeavour Energy's current services, reliability was customers' most important priority (56% had this in their top 3). This was across all but one segment (ATSI). 'Responding to emergencies' and 'managing the network efficiently' were also of high importance to residential customers. Notably, these are areas that customers are least concerned about and where Endeavour Energy is seen to be performing well.

The most important future service was 'helping customers save money by adjusting when they use energy'. This was particularly a priority for Financially Vulnerable customers where 52% had this in their top 3 priorities and suggests they want greater control over their electricity usage and associated costs. This result is not surprising given the high level of concern expressed by residential customers over the cost of electricity and the cost of living in general. This was followed by maintaining current levels of reliability in the face of increasing major weather events.

	 Total residential (n=1,001)	 Financially vulnerable (n=290)	 Innovators (n=70)	 CALD (n=197)	 ATSI (n=37)	 SMEs (n=265)
Most important current services* (% rated in top three)	1. Reliable supply of electricity (56%) 2. Responding to emergencies (32%) 3. Managing the network efficiently (30%)	1. Reliable supply of electricity (48%) 2. Helping vulnerable customers (36%) 3. Responding to emergencies (29%)	1. Reliable supply of electricity (41%) 2. Safety-related issues (30%) 3. Strengthening the network (improving resilience) (29%)	1. Reliable supply of electricity (55%) 2. Responding to emergencies (29%) 3. Managing the network efficiently (27%)	1. Keeping customers informed (33%) 2. Planning for the future (31%) 3. New technologies (28%)	1. Reliable supply of electricity (38%) 2. Strengthening the network (improving resilience) (27%) 3. Safety-related issues (27%)
Most important future services* (% rated in top three)	1. Help customers save money by adjusting when they use energy (45%) 2. Reliability as the climate changes (29%) 3. Communication on disruptions (26%) 4. Solar panel technology (26%)	1. Help customers save money by adjusting when they use energy (52%) 2. Communication on disruptions (34%) 3. Using technology to save money (26%)	1. Help customers save money by adjusting when they use energy (31%) 2. Fast-track the infrastructure needed to connect (30%) 3. Solar panel technology (28%)	1. Help customers save money by adjusting when they use energy (36%) 2. Solar panel technology (29%) 3. Reliability as the climate changes (27%)	1. Help cut greenhouse gases (38%) 2. Help customers save money by adjusting when they use energy (38%) 3. Communication on disruptions (31%)	1. Help customers save money by adjusting when they use energy (37%) 2. Communication on disruptions (34%) 3. Electricity trading (peer to peer, community battery) (32%)


Relative importance of services

The research explored what participants thought were the most important actions that Endeavour Energy should provide to customers in the lead up to 2029 using a Maxdiff experiment. Off-peak tariffs, followed by ensuring high levels of safety, and accessibility to usage data were considered the most important actions for residential customers. For SMEs the most important action was moving existing power lines underground to reduce the risk of bushfires and outages. However, we observed that the Preference Share scores (the relative importance for each of the 24 actions presented which add up to 100%), had minimal differentiation and were relatively consistent across segments. This suggests that many of these proposed actions are seen as important to customers.

Max diff analysis: Preference Share score indicating relative importance (% out of 100)	 Total Residential (n=1,001)	 Financially Vulnerable (n=290)	 Innovators (n=70)	 CALD (n=197)	 SMEs (n=265)
	<ol style="list-style-type: none"> 1. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (8%) 2. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (7%) 3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (6%) 4. Reduce unplanned outages or blackouts for all customers (6%) 5. Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want (6%) 	<ol style="list-style-type: none"> 1. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (8%) 2. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (7%) 3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (6%) 4. Reduce unplanned outages or blackouts for all customers (6%) 	<ol style="list-style-type: none"> 1. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (7%) 2. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (6%) 3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (6%) 4. Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want (6%) 	<ol style="list-style-type: none"> 1. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (7%) 2. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (7%) 3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (6%) 4. Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want (6%) 	<ol style="list-style-type: none"> 1. Move existing power lines underground to reduce risk of sparking bushfires & risk of outages or blackouts (at significant cost to all customers) (8%) 2. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (6%) 3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (5%) 4. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (5%) 5. Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want (5%)


Unpacking the top 5 priorities: Residential customers



Priority and Preference Share (out of 100 %)	 Insight from earlier focus group and Customer Panel research
1. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (8%)	Customers look at electricity issues through the prism of impact on themselves and, as noted, are highly focused on saving money in light of current cost-of-living pressures. The importance given to the ability to save money by changing their behaviour is consistent with the Customer Panel's views, and demonstrates customers' desire for greater control over their energy bills. It is not surprising that the flip side of this point, 'charge customers more when they use electricity at peak times (4-8pm weekdays) to reduce the need for extra investment in the grid' was ranked last in the Maxdiff analysis with a score of 2%. Once time-of-use pricing was explained to the Customer Panel, they supported time-of-use pricing in principle and thought it should be introduced over time, with plenty of education. Some are concerned about the ability of some customers to change their consumption behaviour.
2. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (7%)	Safety issues aren't top of mind for most residential customers, with most not aware of any issues in this space. Most think of it primarily in terms of safety issues in their homes eg fraying wires. In the context of the MaxDiff experiment where customers had to pick the most important issue in a set, they rated safety very highly. This is consistent with the Customer Panel who viewed safety as an important non-negotiable value, but not an issue of concern.
3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (6%)	Linked with the first point, customers are keen to identify ways they can exert control and keep their costs down. We know that access to this data requires the customer to have a smart meter and that there are some concerns about data privacy.
4. Reduce unplanned outages or blackouts for all customers (6%)	Customers place a high priority on reliability of electricity supply and this appears to have increased over time with more people working and studying at home, increasing reliance on electrical devices and connectedness via social media, and greater awareness of outages as a result of major weather events. Many feel its importance will only increase in importance with higher uptake of electric vehicles.
5. Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want (6%)	Customers support the transition to more renewable sources of energy, including use of these technologies. Many customers have already invested in rooftop solar and others are keen to. They believe this should be encouraged rather than constrained. Some also note that those who have done the right thing and installed in solar panels should not be penalised.

Unpacking the top 5 priorities: **SME** customers



Priority and Preference Share (out of 100 %)	 Insight from earlier focus group and Customer Panel research
1. Move existing power lines underground to reduce risk of sparking bushfires & risk of outages or blackouts (at significant cost to all customers) (8%)	<p>This is the only action that is different from the priorities of residential customers. Note that SMEs are more concerned about safety issues associated with electricity and place a higher priority on safety related issues when it comes to future services. They also place more importance on strengthening the network in regions facing increasing major weather events to improve resilience, and undergrounding power lines is seen by many as a way to improve resilience.</p> <p>In earlier focus groups residential customers also expressed interest in undergrounding, but were deterred by the cost implications.</p>
2. Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays) (6%)	<p>Like residential customers, SMEs are interested in identifying ways they can save money, even if it involves a change of behaviour. They are also more likely than residential customers to consider installing energy technology in the next 12 months - in particular rooftop solar panels or a battery, though we note there are barriers to doing so with many SMEs operating from rented premises.</p>
3. Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down (5%)	<p>As above</p>
4. Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers (5%)	<p>As noted, SMEs are more concerned than residential customers about safety issues associated with electricity and do place a higher priority on safety related issues when it comes to future services.</p>
5. Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want (5%)	<p>As above</p>

Segment snapshots: Residential customers



Financially Vulnerable (n=290)

28% of residential participants were Financially Vulnerable

They are highly concerned about electricity issues and sensitive to the cost of living and bill affordability. The Financially Vulnerable are quite knowledgeable about Endeavour Energy and really value tools, education and data that enable them to manage their usage. Despite this, they are less likely to have energy technology installed or intend to install them.

- More likely to be **concerned about all electricity issues**, highest of which were the cost of electricity (82% vs. 61% of those not vulnerable) and being able to afford their electricity bills (77% vs. 38%).
- Among those aware of Endeavour Energy by name, they were **more likely to know a fair bit or a lot** (22% vs. 11%).
- Out of Endeavour Energy's current services, they were **more likely to rate tools which help manage their usage as good or excellent** (53% vs. 43%).
- Of future services, they were **more likely to rate education and data as quite or very important** (68% vs. 59%), as well as offering small and medium businesses a range of different services (55% vs. 46%).
- **Less likely to have rooftop solar panels installed** (21% vs 31%). They were also less likely to install rooftop solar (10% vs. 15%), purchase an EV (4% vs. 11%) or an EV charging station (4% vs. 8%) in the next 12 months.
- They were **more likely to be a Laggard when it comes to technology adoption** (11% vs. 6%). This means that if an energy company offered a new technology or innovative service they would only use it if they really had to.
- More likely **to identify as Aboriginal and Torres Strait Islander** (8% vs. 2%).



Innovators (n=70)

7% of residential participants were Innovators

Innovators are very knowledgeable about Endeavour Energy, feel positive about the organisation and rate current services more highly. They consider nearly all of Endeavour's energy's proposed future services as important and really value ones relating to technology and data. They are most likely to have energy technologies installed or intend to install in the next 12 months.

- Among Innovators aware of Endeavour Energy by name, they are **more likely to know a fair bit or a lot** (32% vs. 13% of those not classified as Innovators).
- More likely to **feel positive towards Endeavour Energy** (73% vs. 55%).
- More likely to **rate nearly all of Endeavour Energy's current services as good or excellent**. The highest rated services were reliability of supply (78% vs. 60%), keeping customers informed (76% vs. 48%), helping vulnerable customers (75% vs. 45%) and tools to help manage their usage (75% vs. 44%).
- More likely to **rate a range of future services as quite or very important**, with the highest of those being increasing digital security (83% vs. 67%) and electricity trading (peer to peer, community battery (76% vs. 59%), education and data (75% vs. 60%) and ensuring the electricity grid can cope with the demand of electric vehicles (74% vs. 57%).
- **More likely to have an EV** (7% vs. 2%) **or an EV charging station** (8% vs. 2%). They were also more **likely to install a range of energy technologies in the next 12 months, with the most likely being a storage battery** (31% vs. 12%).

Segment snapshots: Residential customers



CALD (n=197)

18% of residential participants were Culturally and Linguistically Diverse

They have some more pronounced concerns relating to electricity (safety issues, being able to keep their houses cool in summer and warm in winter) but they are less likely to be aware of Endeavour Energy by name. They place higher importance on all future services, especially ones that involve energy management and technology. They are more likely to be Innovators, which helps to explain why they are more likely to have solar PV and intend to install a range of technologies.

- More likely to be **concerned about safety issues associated with electricity** (36% vs. 24% of those not CALD) and **being able to keep their house cool in summer and warm in winter** (50% vs. 41%). They are also more likely to be concerned about the cost of gas (57% vs. 41%), noting they are more likely to live in homes with mains connected gas (62% vs. 50%).
- **Less likely to be aware of Endeavour Energy by name** (71% vs. 82%)
- Of Endeavour Energy's current services, **more likely to rate the reading of electricity meters so their bills are accurate as good or excellent** (62% vs. 51%)
- More likely to **rate a range of future services as quite or very important**, with the highest of those being helping customers save money by adjusting when they use energy (79% vs. 71%) and solar panel technology (79% vs. 70%).
- More likely to **have rooftop solar installed** (40% vs. 25%) and **install a range of energy technologies**. They were most likely to install a storage battery (20% vs. 12%) and solar hot water (20% vs. 9%).
- They were **more likely to be classified as an Innovator when it comes to technology adoption** (11% vs. 6%)

ATSI (n=37)

4% of residential participants identify as Aboriginal or Torres Strait Islander

Keeping homes cool in summer and warm in winter is of significantly higher concern for ATSI customers. They rate energy usage tools from Endeavour highly and are likely to install solar hot water in the next 12 months. We note that more than half of ATSI customers were classified as Financially Vulnerable.

- More likely to be **concerned about being able to keep their home cool in summer and warm in winter** (66% vs. 42% of those not ATSI)
- Of Endeavour Energy's current services, they were **more likely to rate tools which help manage their usage as good or excellent** (67% vs. 45%)
- **More likely to install a solar hot water system** in the next 12 months (21% vs. 10%).
- They are **more likely to be Financially Vulnerable** (60% vs. 27%)

Segment snapshots: SME customers



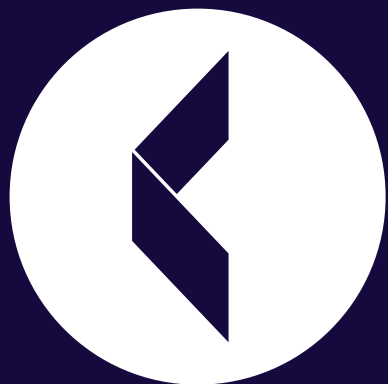
SME (n=265)

SMEs are more knowledgeable and overall more positive about Endeavour Energy overall and about the services it currently offers. Prioritisation of current and future services is much more varied among SMEs, reflecting a broader spectrum of needs and priorities among this cohort

- Less **concerned about the cost of electricity** (47% vs. 67% of residents) but much more **concerned about safety issues** associated with electricity (41% vs. 26%)
- Less likely to be **aware of Endeavour Energy by name** (58% vs. 80% of residents) but among those who are aware of it, are much more knowledgeable (35% know a fair bit or a lot compared to 14% of residents)
- Far more likely to **feel positive towards Endeavour Energy** (86% vs. 56%) and give higher performance ratings for Endeavour Energy's delivery of its **current services** compared to residential customers
- More likely to **consider installing energy technology** in the next 12 months compared to residents – in particular rooftop solar panels (42% vs. 14%) or a battery (35% vs. 13%)
- Although **'reliable supply of electricity' is also the highest priority** when it comes to current services, SMEs place less importance on this compared to residential customers (38% vs. 56% have this in their top 3). They place a higher priority on 'safety-related issues' (27% vs. 19%) and 'strengthening the network' (27% vs. 19%)
- When it comes to future services, SMEs also highly prioritise **'helping customers save money by adjusting when they use energy'** (37% placed this in their top three), but they also place a high priority on 'communications on disruptions' and 'electricity trading' (34% and 32% respectively)
- **Undergrounding of power lines** to minimise the risk bushfires and outages considered the most important activity for Endeavour to pursue in the next five years



Detailed Findings

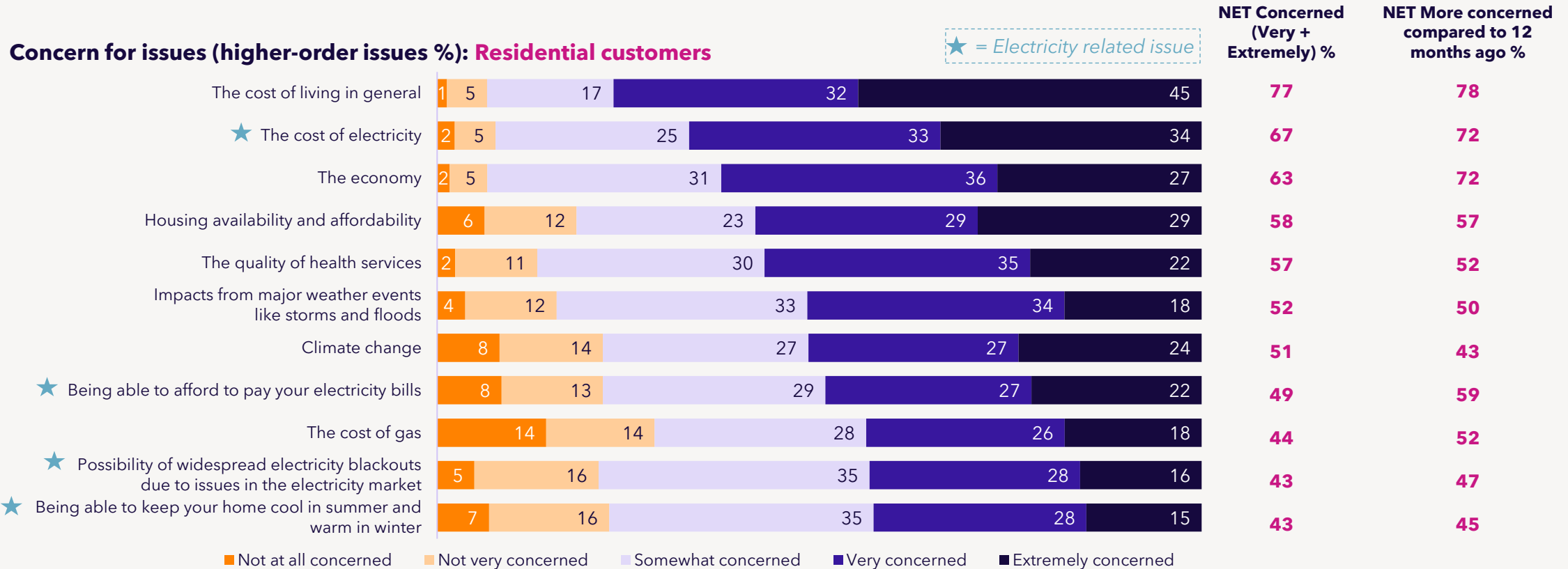


**Context: Baseline
concerns, knowledge
and sentiment**

Electricity issues in context: Residential



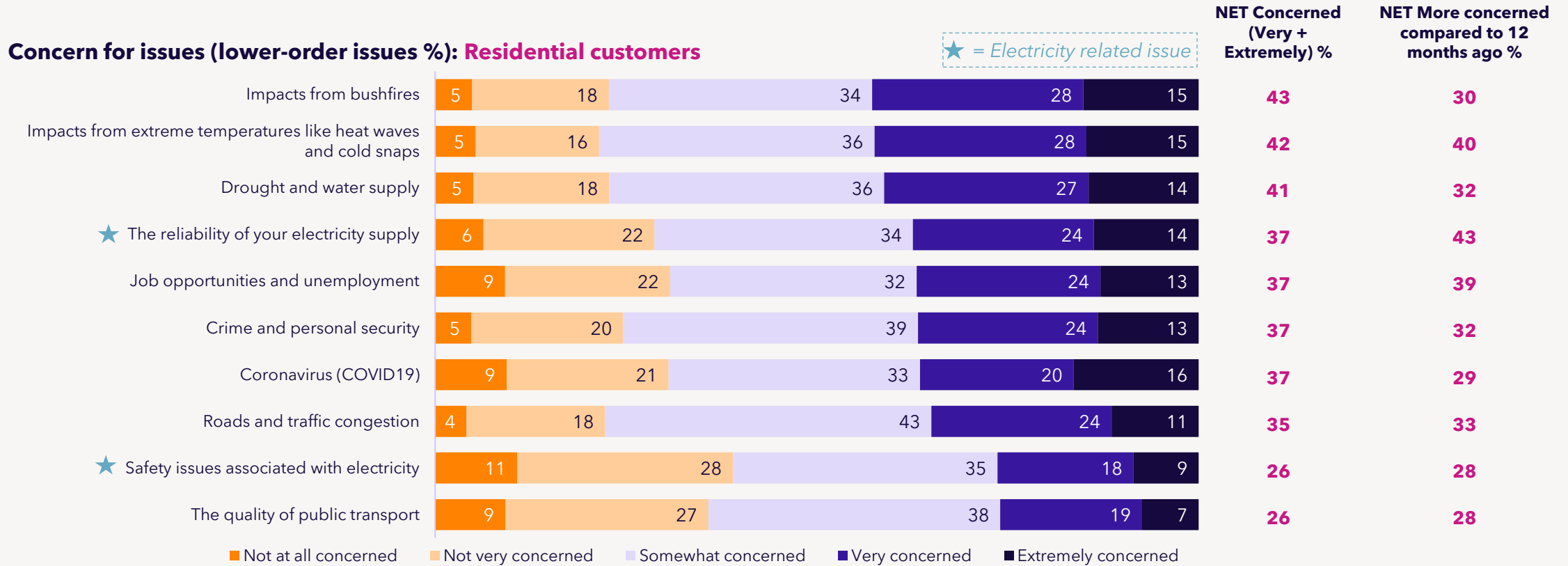
Residential customers were most concerned about the cost of living (77%), closely followed by the cost of electricity (67%). The majority said they were more concerned about these issues compared to 12 months ago. Other electricity related issues such as being able to afford bills and the possibility of widespread blackouts were of strong concern for just under half of participants.



Females were significantly more likely than males to be concerned about the cost of electricity (76% vs 58% of males) and being able to afford their electricity bills (56% vs 42%). The financially vulnerable were more likely to be concerned about all electricity related issues, especially those relating to cost – 82% were concerned about the cost of electricity and 77% were concerned about bill affordability, with further pressure added by the cost of living (90% concerned).

Electricity issues in context: Residential (cont.)

Reliability and safety issues are of less concern than the cost of electricity and bill affordability. This echoes the qualitative research which found that most customers are comfortable with current levels of reliability and don't think much about safety issues.



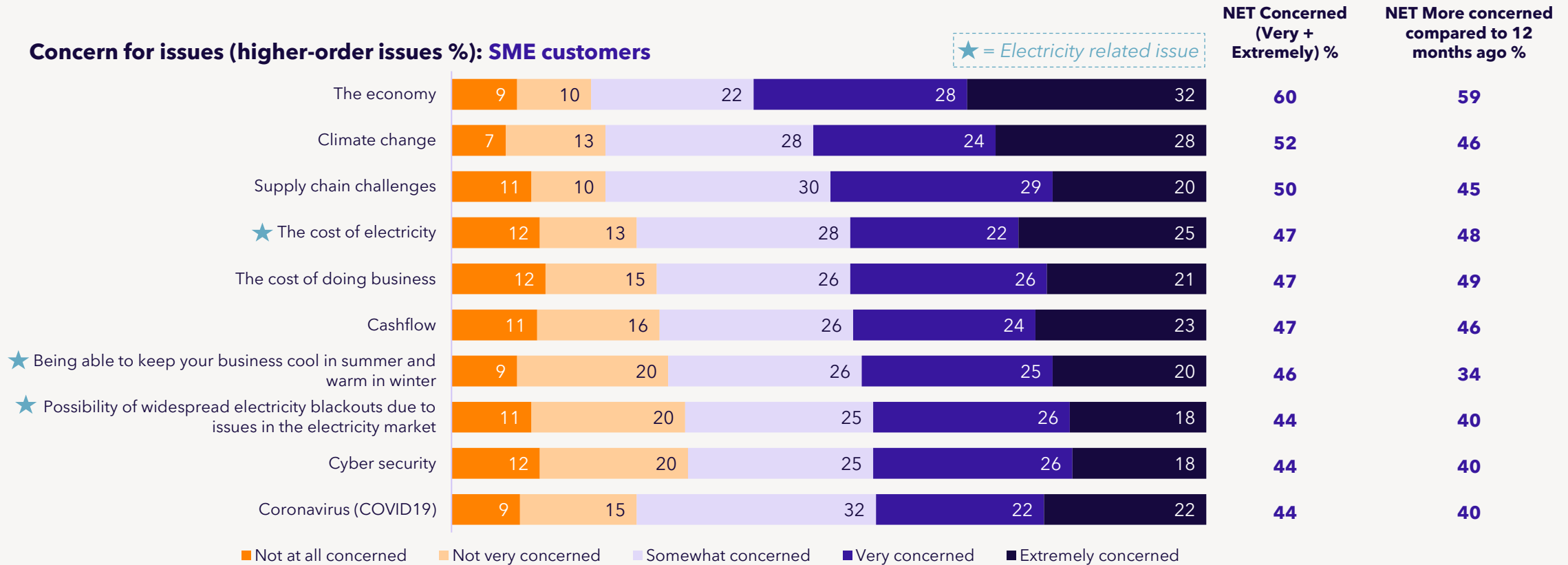
Although reliability was a lower order issue overall, concern was significantly higher among the financially vulnerable (46% concerned) and those likely to install a storage battery (55%) or purchase an EV (55%) in the next 12 months. Older customers aged 65+ were less likely to be concerned about reliability (27% compared to 40% of those aged 18-64). Concern for safety issues was higher among the financially vulnerable (34%), CALD (36%) and those likely to install a storage battery (41%) or purchase an EV (48%) in the next 12 months.

Electricity issues in context: SMEs



Compared to residential customers, fewer SMEs were strongly concerned about the cost of their electricity (47%). They rated the economy, climate change and supply chain issues as more concerning and around half reported being more concerned about these issues compared to twelve months ago.

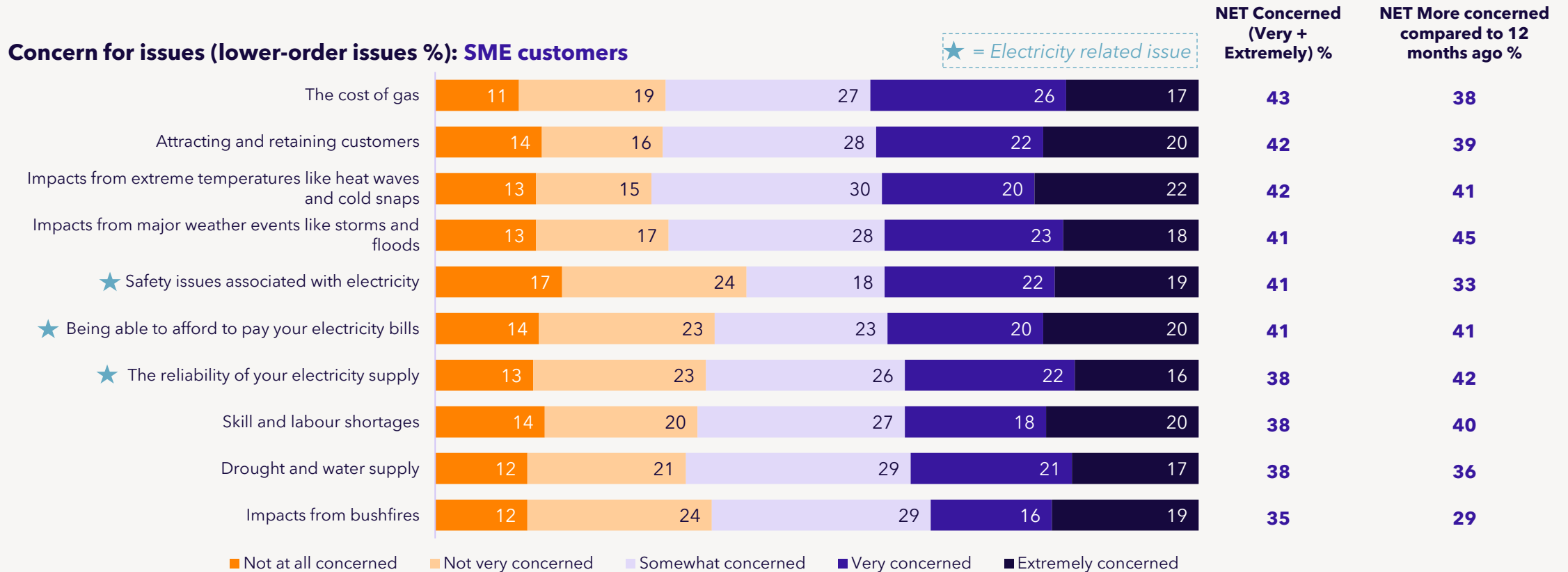
Concern for issues (higher-order issues %): SME customers



Although the possibility of widespread blackouts due to issues in the electricity market was a mid-level concern, SMEs with rooftop solar were significantly more likely to be concerned about this (59% vs 38% among those without rooftop solar).

Electricity issues in context: SMEs (cont.)

The issues of electrical safety, the ability to afford their electricity bills and the reliability of their supply were lower order concerns for SMEs, although around two in five were strongly concerned.

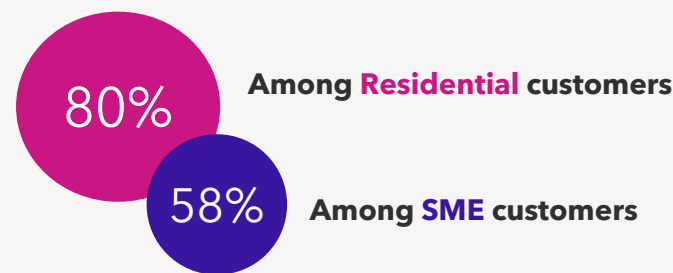


SMEs with rooftop solar were significantly more likely to be concerned for the safety issues associated with electricity (58% vs 34% of SMEs without solar) and the reliability of their supply (53% vs 33%). Like their residential counterparts, financially vulnerable SMEs were more likely to be concerned with being able to afford to pay their electricity bills (59% vs 35% among those not vulnerable).

Awareness and knowledge of Endeavour Energy

Residential customers were more likely than SMEs to be aware of Endeavour Energy by name (80% compared to 58%). However, SMEs demonstrated higher levels of self-reported knowledge - 35% knew a fair bit or a lot while just 14% of residential customers reported the same levels of knowledge.

Prompted awareness of Endeavour Energy (by name only)

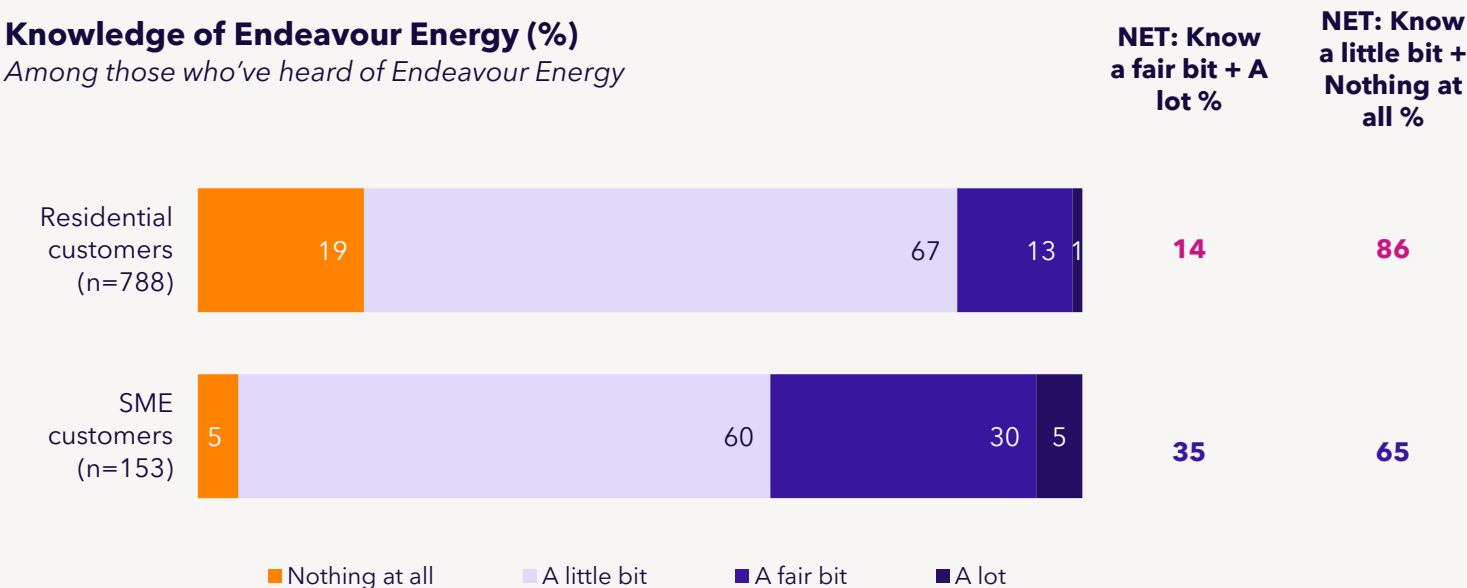


Awareness among residents was significantly higher for older customers (89% aged over 50 vs. 73% among those who are younger). Those from CALD backgrounds were less likely to be aware (71% compared to 82% of residents not from a CALD background).

SMEs with rooftop solar were more likely to be aware (71% vs. 52% who do not have rooftop solar), as were SMEs who are financially vulnerable (78% vs. 52% of those who are not).

Knowledge of Endeavour Energy (%)

Among those who've heard of Endeavour Energy



Among those aware of Endeavour Energy, segments of residential customers more likely to be quite knowledgeable (knowing a fair bit / a lot) included males (19% vs 10% of females), the financially vulnerable (22%), Innovators (32%), those with a storage battery installed (29%) and those likely to purchase an EV in the next 12 months (31%). There were no segment differences for SMEs.

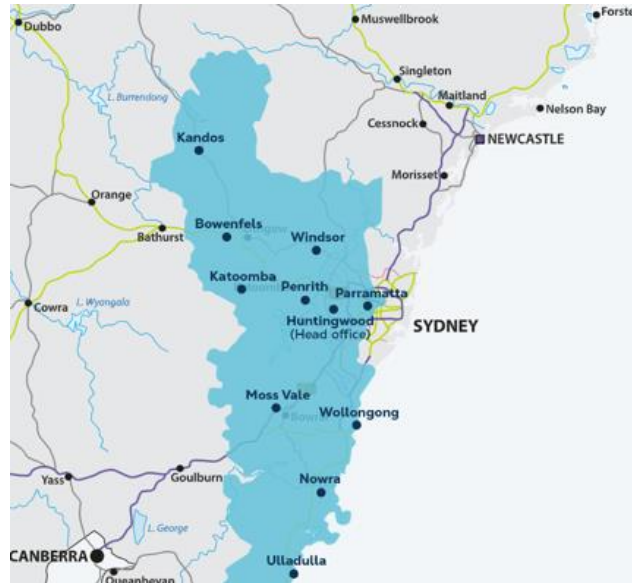
Survey stimulus: About Endeavour Energy

Before asking any further questions about Endeavour Energy, participants were shown the following information.

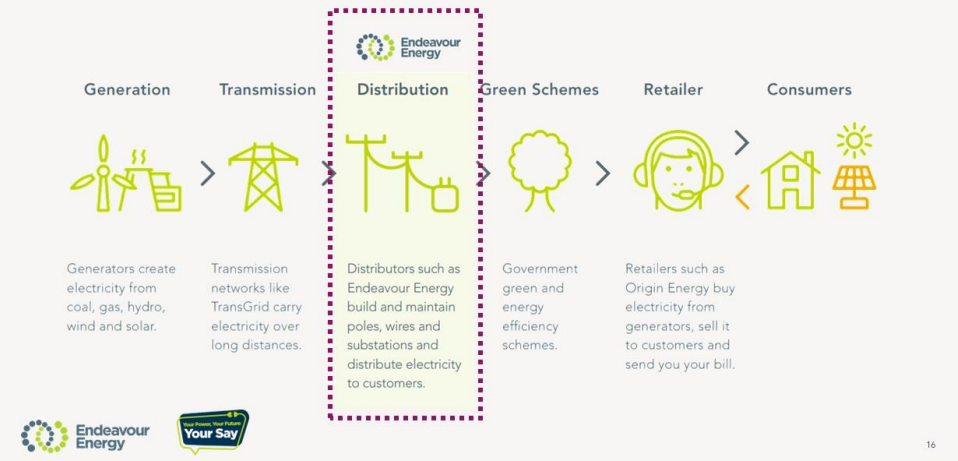
As you might already know, Endeavour Energy is an electricity distributor, responsible for building, maintaining and operating an electricity network that connects more than 2.6 million homes and businesses to traditional and renewable energy sources. Its work contributes to the growth, economic development and prosperity of communities in Sydney's Greater West, the Blue Mountains, the Southern Highlands, Illawarra and the South Coast of NSW (as shown in blue in the map below).

Endeavour Energy is working with customers to plan the transition to a modern grid where solar, batteries and smart meters will enable the shift to a low carbon environment.

Endeavour Energy is not a retailer. Retailers send you your electricity bill. Endeavour Energy's costs make up 30 cents in every dollar of your electricity bill.



The electricity supply chain and Endeavour Energy's role within it



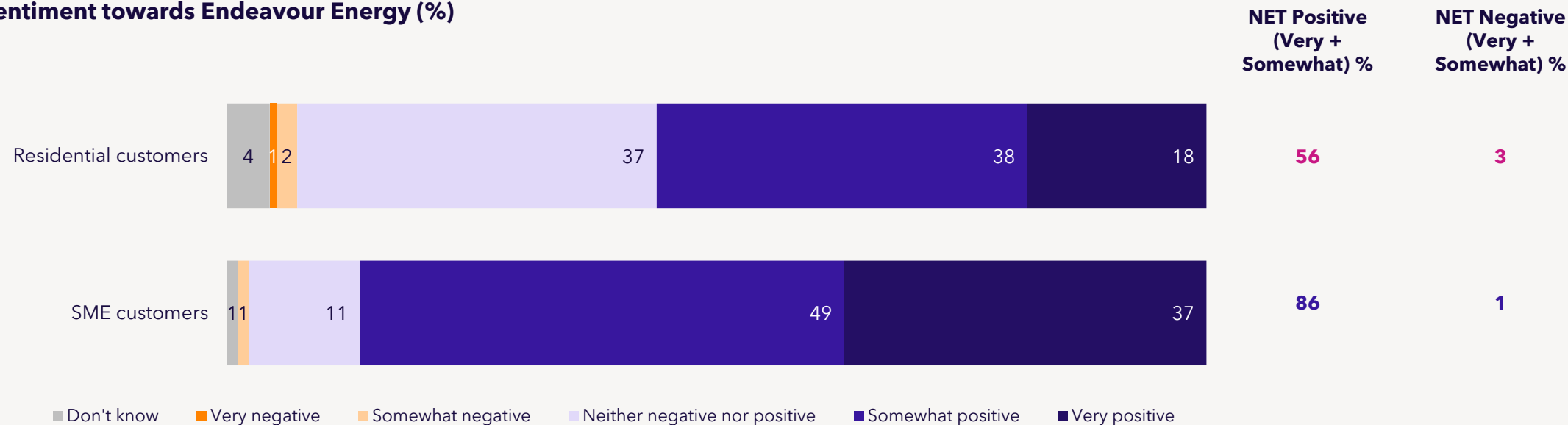
We serve:



Sentiment towards Endeavour Energy

Customer sentiment was assessed after being given information about Endeavour Energy and this was broadly positive. More than half (56%) of residential participants held a positive opinion and levels of positivity increased to nearly nine in ten (86%) among SME customers.

Sentiment towards Endeavour Energy (%)



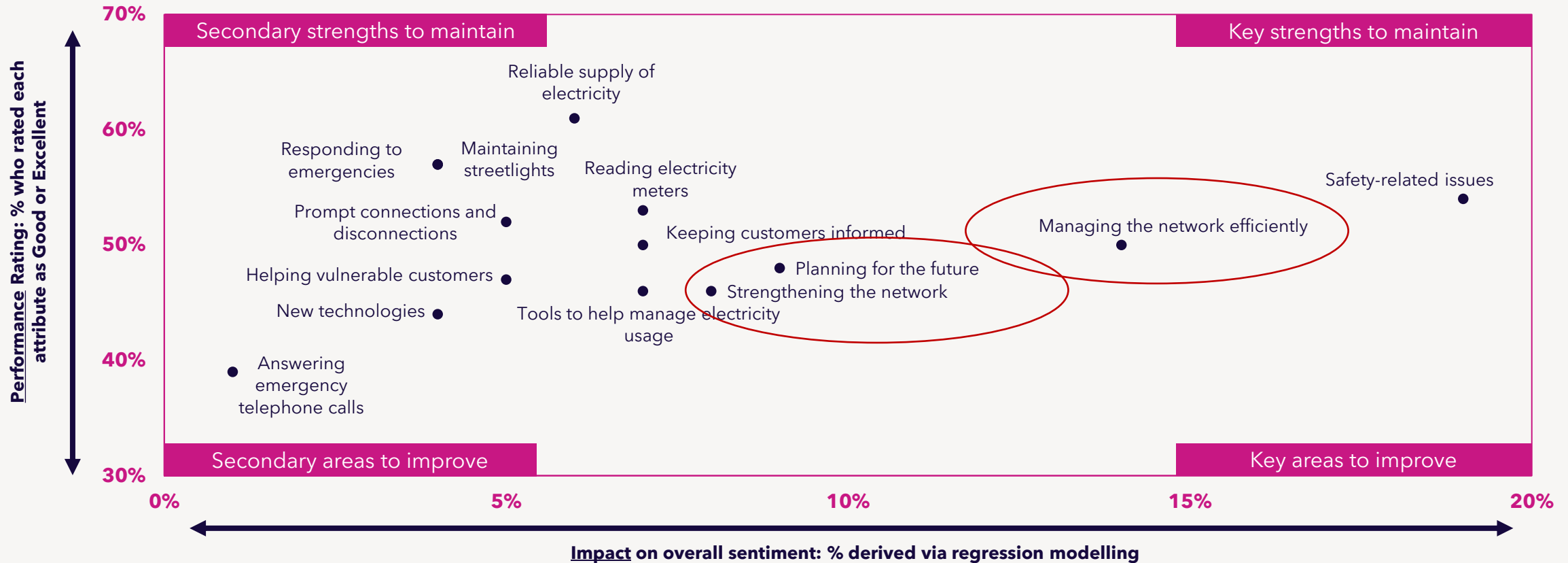
Positive sentiment was higher among those who reported being quite knowledgeable about Endeavour Energy (know a fair bit / a lot) – 72% of these residential participants were positive, while just 3% had a negative opinion. Positivity was also significantly higher among males (61% vs. 51% among females). Innovators (73%) and those likely to install rooftop solar (70%) or purchase an EV (79%) in the next 12 months.

SMEs likely to install a storage battery in the next 12 months were more likely to feel positive (95%) while financially vulnerable SMEs were less likely to feel positive (75% vs 90% positivity among those not vulnerable).

Drivers of overall sentiment: Residential



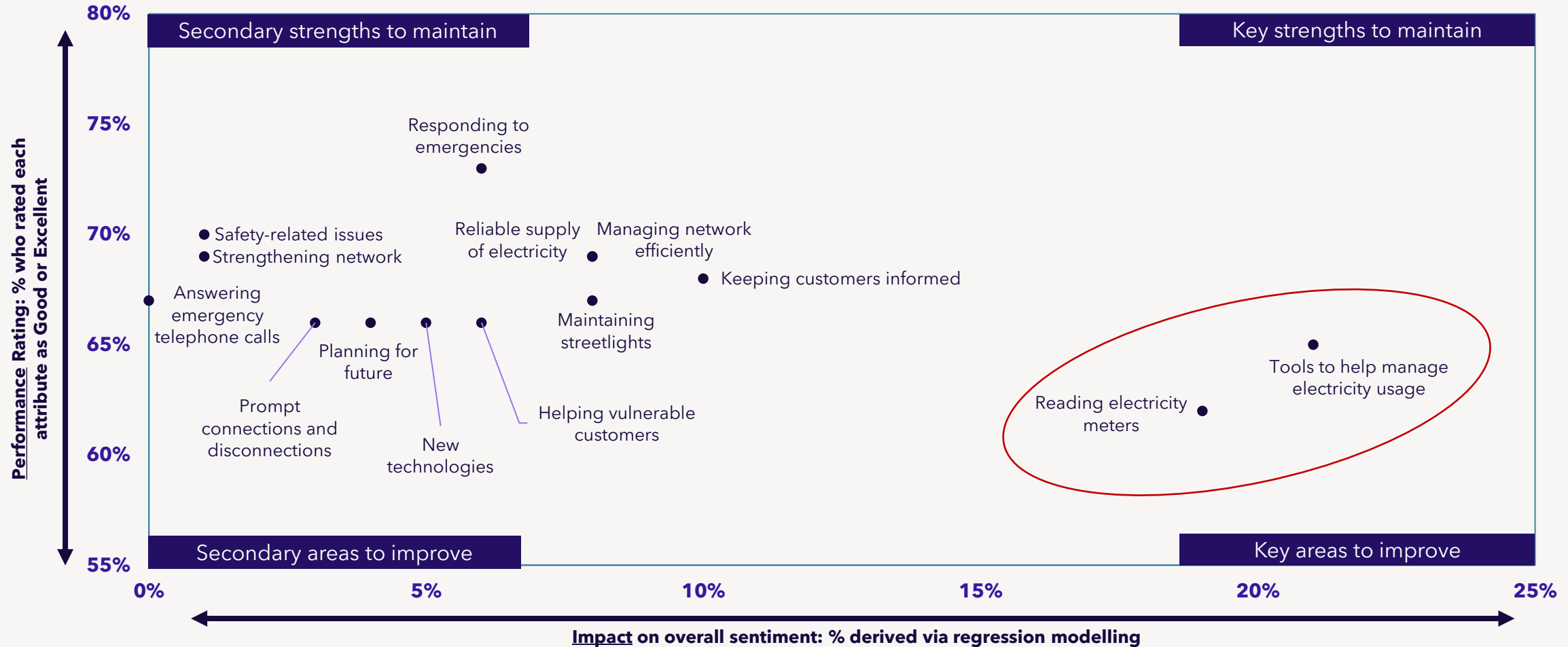
A driver analysis was conducted to understand the extent to which specific services (current) drive overall perceptions of Endeavour Energy. The chart below shows the derived importance (or impact) of each metric against the perceived performance. The results show that safety related issues have the biggest impact on overall perceptions and should be considered a strength to maintain given its relatively higher performance score. Managing the network efficiently, planning for the future and strengthening the network to improve resilience should be considered key areas for improvement given their lower performance ratings and relatively high impact.



Drivers of overall sentiment: SME



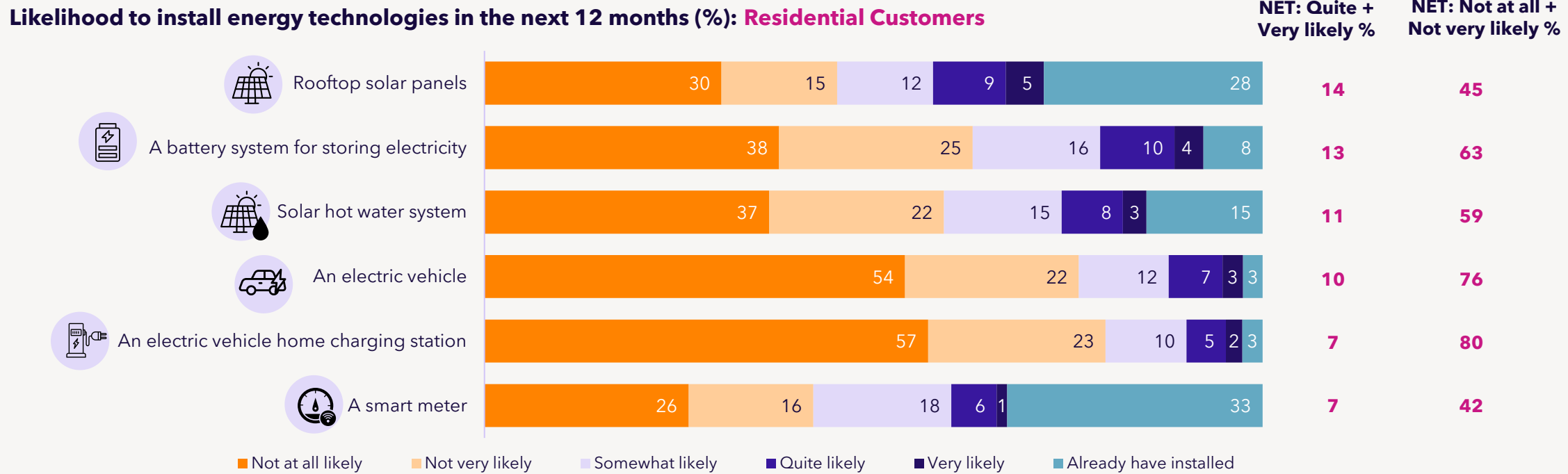
For SMEs the biggest drivers of overall perceptions and the key areas for improvement were tools to help manage electricity usage and reading electricity meters. Improving perceptions of Endeavour's performance in maintaining streetlights and helping vulnerable customers will also help improve overall opinions.



Technology adoption: Residential



There is moderate interest in purchase of rooftop solar panels and battery systems in the next 12 months; of note is that interest in batteries is only just below that of solar panels. We also note that results reflect customer confusion over whether or not they have a smart meter.



48% already had at least one of these energy technologies installed and 29% were quite or very likely to install at least one in the next 12 months.

Residential customers aged 18-34 were significantly more likely to install several new technologies in the next 12 months compared to those who are older, including rooftop solar panels (21% vs. 12%), a solar hot water system (17% vs. 9%) and a smart meter (11% vs. 6%). Those in South-western Sydney and Southern Highlands were more likely to install a storage battery (19%) compared to those in the Illawarra and South Coast (8%). Those with rooftop solar had a higher likelihood of purchasing an EV (14%) or an EV home charging station (11%). Innovators and CALD customers also report being significantly more likely to install close to all energy technologies in the next year, as do males.

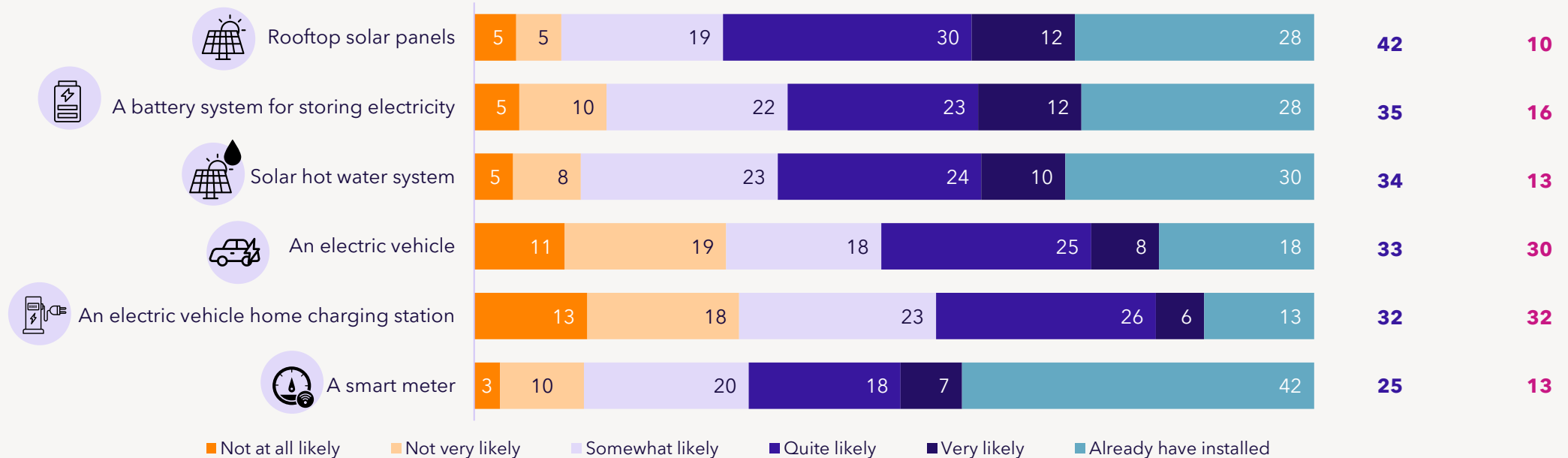
Technology adoption: SMEs



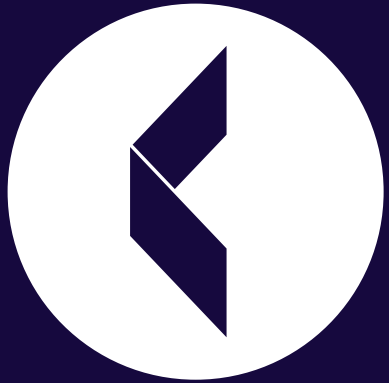
SMEs were more likely to report having any of the energy technologies installed than residential customers, with around three in ten reporting having rooftop solar or a battery system. They were also quite or very likely to install technologies in the next 12 months – ranging from 25% to 42% for each item.

Likelihood to install energy technologies in the next 12 months (%): SME Customers

NET: Quite + Very likely %
NET: Not at all + Not very likely %



62% already had at least one of these energy technologies installed and 70% were quite or very likely to install at least one in the next 12 months.



Testing the value framework

Current Services

Participants were shown a list of Endeavour's **current services** and were first asked to rate Endeavour Energy's performance in delivering these services and were then asked to select the three services that were most important to them personally. Participants were shown the detailed descriptions as per the table below, but in the interest of brevity the bold service descriptions are shown throughout the report.

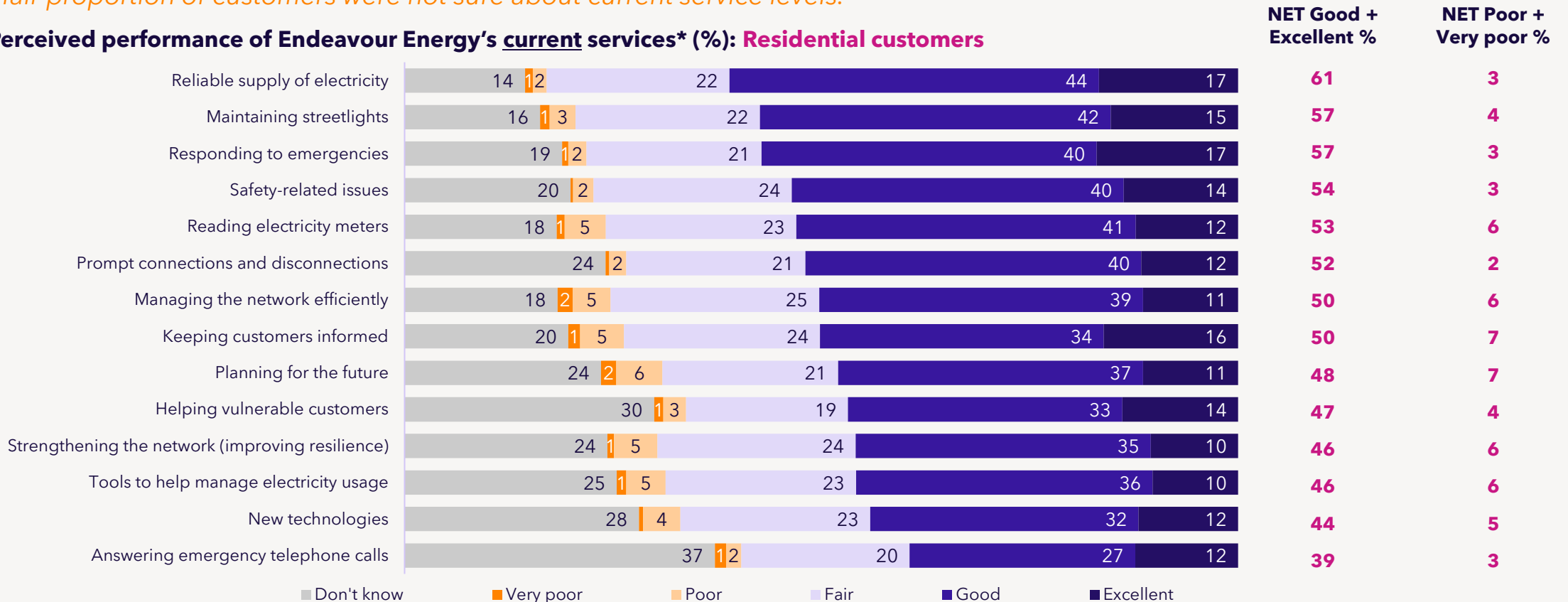
Service description
Reliable supply of electricity: Providing a reliable supply of electricity to customers by building, maintaining and managing the substations, poles and wires, underground cables and other equipment.
Safety-related issues: Managing safety-related issues to reduce risks to the community by monitoring infrastructure, trimming trees to maintain safety clearances, managing bushfire risk and preventing blackouts caused by falling trees.
Managing the network efficiently: Managing the network efficiently to deliver electricity services in the most affordable way.
Planning for the future: Planning for the future by building the electricity infrastructure to accommodate growing suburbs and industries.
Responding to emergencies: Responding to emergencies like storms which bring down power lines and poles to reduce the safety risk and restore power as quickly and safely as possible.
Strengthening the network (improving resilience*): Proactively strengthening the network in regions facing increasing major weather events to improve the resilience of exposed areas.
Keeping customers informed: Keeping customers informed of planned and unplanned outages to minimise disruption (i.e. via SMS, website, social media plus mailbox drops for life-support customers).
Prompt connections and disconnections: Providing prompt connections and disconnections when required, including new services and solar connections.
Helping vulnerable customers: Helping vulnerable customers to keep the power on when things go wrong in their lives or when they need electricity to power medical equipment to preserve life (life support customers).
New technologies: Researching, trialling, and installing new technologies such as batteries to improve efficiency of infrastructure investment where possible, helping contribute to long-term affordability of electricity bills.
Maintaining streetlights: Installing and maintaining streetlights for local councils to keep communities safe.
Tools to help manage electricity usage: Providing customers with tools like apps and tips to help manage electricity usage and costs via telephone, text and website
Answering emergency telephone calls: Answering emergency telephone calls within 30 seconds.
Reading electricity meters: Reading electricity meters and sending the data to retailers so your electricity bills are accurate.

Performance on current services: Residential



Residential customers rated 'the reliable supply of electricity' as the best performing service attribute - 61% rated this good or excellent. 'Maintaining streetlights', 'responding to emergencies', 'safety-related issues', 'reading meters' and 'prompt connections and disconnections' were other top-rated services (more than half rating these as good or excellent). Notably, a fair proportion of customers were not sure about current service levels.

Perceived performance of Endeavour Energy's current services* (%): Residential customers



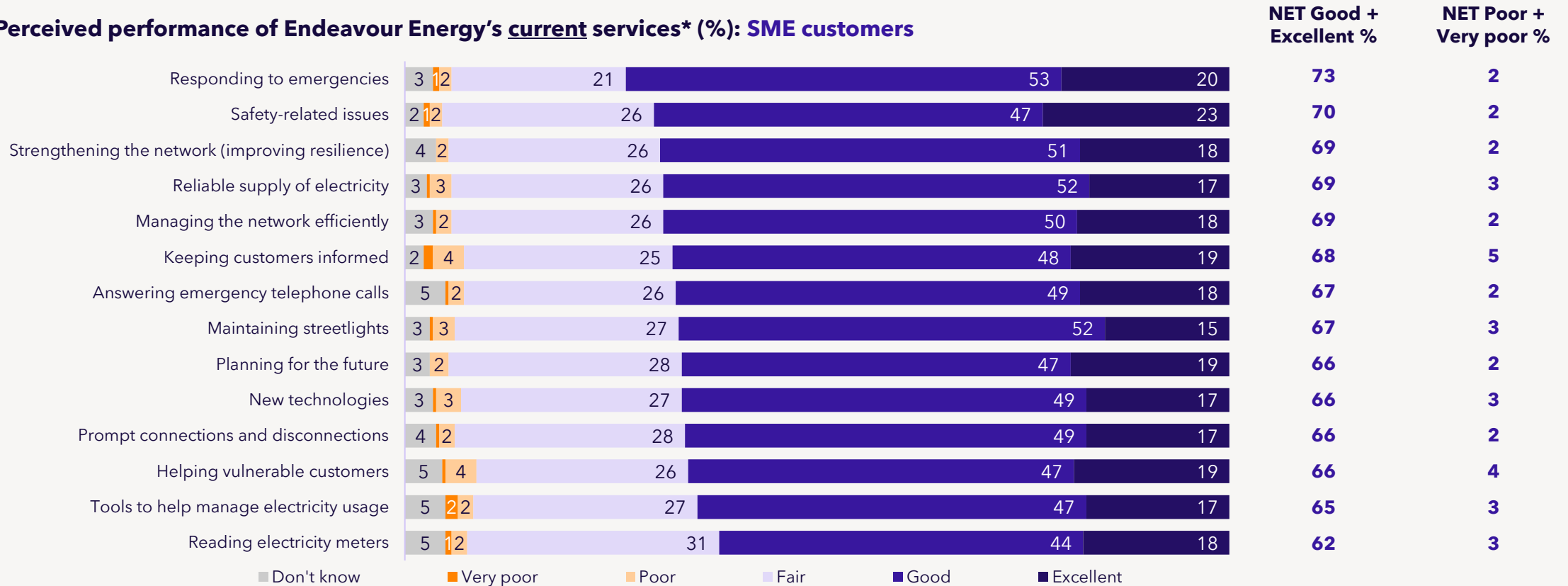
Not surprisingly, residential customers with a positive sentiment towards Endeavour Energy were more likely to rate all these services as good or excellent, compared to those who feel negative or neutral – **sentiment is very clearly linked with perceived performance of services.**

Performance on current services: SMEs



SMEs provided higher performance ratings for current services across the board and were far less likely to select 'don't know'. 'Responding to emergencies' was the highest rated service (73% good or excellent). As noted, compared to residential customers, SMEs reported higher knowledge levels about Endeavour Energy and had higher rates of positive sentiment, which could indicate higher engagement and understanding of the various services.

Perceived performance of Endeavour Energy's current services* (%): SME customers



SMEs who hold positive sentiment towards Endeavour Energy were more likely to rate most of these services as good or excellent, compared to those who feel negative or neutral.

Importance of current services

When asked what the most important current services were, the top categories related to safety, reliability and affordability. 'Reliable supply of electricity' was the number one priority – over half (56%) of residential customers rated this in their top three and 27% rated this as their single most important service. 'Responding to emergencies' and 'managing the network efficiently' were also high a priority with a third rating these in their top three.

Current service description*	Engagement theme	Residential		SME	
		Selected in top three (%)	Most important (%)	Selected in top three (%)	Most important (%)
Reliable supply of electricity	Safe, Affordable, Reliable	56	27	38	15
Responding to emergencies	Safe, Affordable, Reliable / Resilience	32	9	17	3
Managing the network efficiently	Safe, Affordable, Reliable	30	10	24	9
Helping vulnerable customers	Safe, Affordable, Reliable	23	7	25	8
Planning for the future	Growth	23	7	24	9
Keeping customers informed	Safe, Affordable, Reliable	22	7	24	6
Safety-related issues	Safe, Affordable, Reliable / Resilience	19	5	27	10
New technologies	Energy Choice	19	6	25	8
Strengthening the network (improving resilience)	Resilience	19	5	27	7
Reading electricity meters	Energy Choice	14	4	11	5
Answering emergency telephone calls	Safe, Affordable, Reliable	13	5	16	6
Tools to help manage electricity usage	Energy Choice	11	2	17	5
Prompt connections & disconnections	Energy Choice / Growth	10	3	12	5
Maintaining streetlights	Safe, Affordable, Reliable	9	2	14	3

SME customers also rated 'reliable supply of electricity' as their highest priority – 38% placed this within their top three and 15% said it was their single most important priority. 'Safety-related issues' and 'strengthening the network' were also of a high priority compared to residential customers. Just over a quarter (27%) of SMEs placed each of these in their top three (vs. 19% of residential customers placing each in their top three).

Not unsurprisingly, residential customers who are financially vulnerable were more likely to feel that 'helping vulnerable customers' was of higher importance – 36% rated this service in their top three, compared to 18% of those not vulnerable. Innovators were more likely to place 'prompt connections and disconnections' in their top three (24% vs. 9% of those not Innovators), noting the full service description referenced the connections for new services and solar panels. Those likely to install a storage battery or purchase an EV in the next 12 months were more likely to place 'new technologies' in their top three (31% and 35% respectively).

Future Services

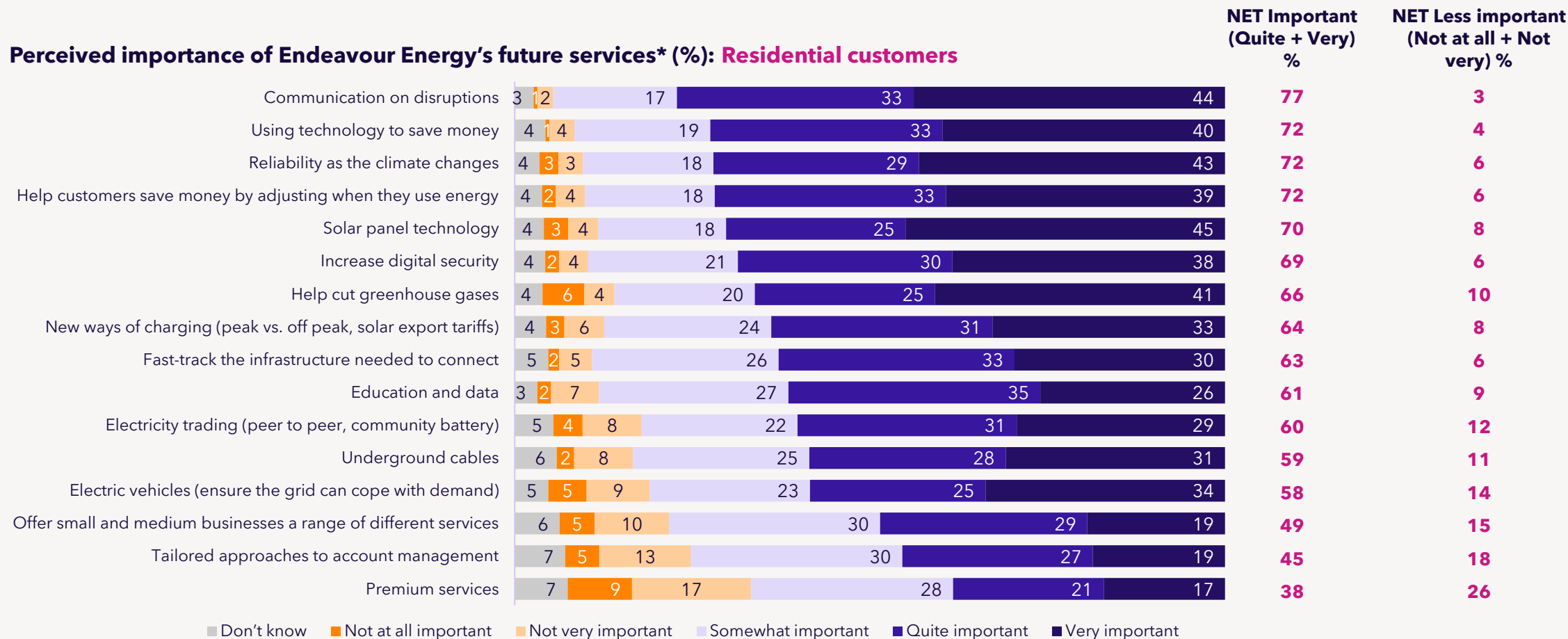
Participants were then shown a list of potential future **services** and were first asked to rate how important each one was and were then asked to select the three services that were most important to them personally. Participants were shown the detailed descriptions as per the table below, but in the interest of brevity the bold service descriptions are shown throughout the report.

Service description
Solar panel technology: Provide the necessary technology so that anyone with a suitable home or business who wants to use solar panels to generate their own electricity and export what they don't use into the grid can do so.
Help customers save money by adjusting when they use energy: Help customers save money if they choose to reduce their energy consumption when everyone uses energy (such as on very hot days) so more equipment doesn't need to be built, helping keep prices down for everyone in the longer term.
Using technology to save money: Help customers save money by using technology that automatically adjust equipment to use energy at the cheapest times.
Reliability as the climate changes: Invest in infrastructure and / or new technology so the current levels of reliability (number of blackouts and speed with which they are fixed) can be maintained as the climate changes (e.g., if there are more floods and fires).
Electricity trading (peer to peer, community battery*): Provide households with an option to send any excess energy from their solar panels to a battery shared with neighbours so they can trade electricity with each other. This would also help make the grid more efficient and keep downwards pressure on bills.
Help cut greenhouse gases: Help cut greenhouse gases and set targets to do this by 2040 through investment in new technology.
New ways of charging (peak vs. off peak, solar export tariffs*): Introduce a new way of charging so that customers can save money if they change the time of day they consume electricity or export solar to match the changing supply and demand in the grid e.g. peak vs. off peak charging.
Electric vehicles (ensure the grid can cope with demand*): Ensure the grid is able to cope with the increased demand likely to come from more people buying electric vehicles.
Fast-track the infrastructure needed to connect: Fast-track electricity infrastructure like substations to connect new business and housing developments so our region can grow quickly rather than invest 'just in time'.
Communication on disruptions: Provide customers more accurate and timely information about unplanned and planned disruptions to their electricity supply.
Underground cables: Replace above ground wires with underground cables to reduce fire risk and improve public amenity (note that this would cost significantly more and often takes longer to find faults).
Education and data: Help customers to understand and manage their electricity consumption and costs through education and data.
Offer small and medium businesses a range of different services: Offer small and medium businesses a range of different services and prices so they can choose what they want in terms of reliability and customer service.
Premium services: Provide services to those who are willing to pay for them, instead of all customers contributing (e.g. improved reliability or express connections)
Increase digital security: Increase digital security to prevent theft of confidential customer data.
Tailored approaches to account management: Provide small and medium businesses more tailored approaches to account management and different levels of support

Importance of future services: Residential



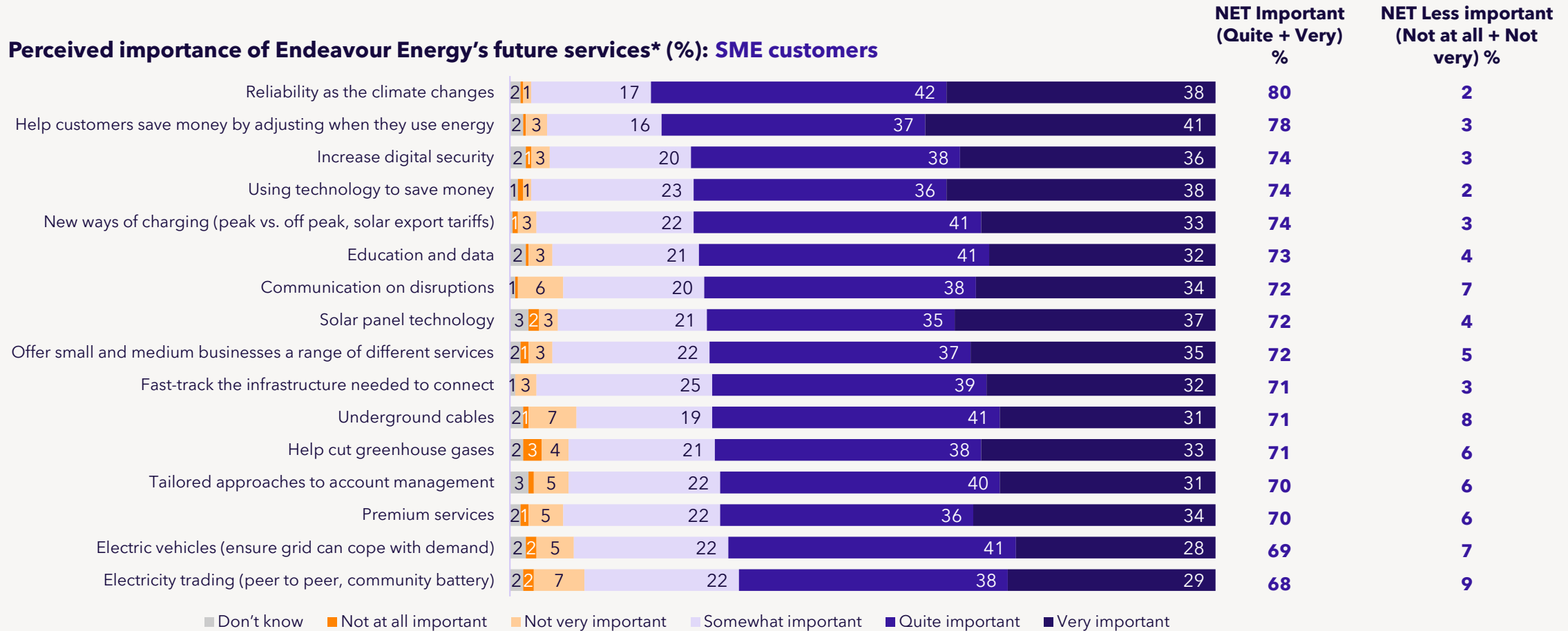
When provided with a list of future services, communications on disruptions was considered the most important service (77% rated as quite or very important). 'Using technology to save money', 'reliability as the climate changes' and 'helping customers to save money by adjusting when they use energy' were also seen as highly important.



Importance of future services: SMEs



'Reliability as the climate changes' was rated the most important future service by SMEs (80% quite or very important). Like residential customers, 'helping customers save money by adjusting when they use energy' and 'using technology to save money' were also of high importance. 'Increasing digital security' and 'new ways of charging' were also of significant importance to SMEs.



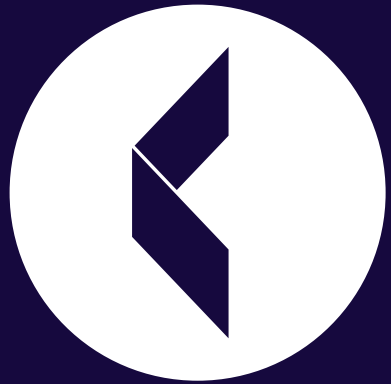
Future services: in order of priority

Participants were also asked to rank a list of proposed future services Endeavour could provide by selecting the three most important ones for them personally. Residential customers highly prioritised 'helping customers to save money by adjusting when they use energy' (45% rated this in their top three services). 'Reliability as the climate changes', 'communications on disruptions' and 'solar panel technology' were also high priorities (more than a quarter rated these in their top three).

Future service description*	Engagement theme	Residential		SME	
		Selected in top three (%)	Most important (%)	Selected in top three (%)	Most important (%)
Help customers save money by adjusting when they use energy	Energy Choice	45	21	37	14
Reliability as the climate changes	Resilience	29	8	23	3
Communication on disruptions	Safe, Affordable, Reliable / Energy Choice	26	14	34	18
Solar panel technology	Energy Choice	26	5	15	1
Help cut greenhouse gases	Energy Choice	25	8	14	2
Using technology to save money	Energy Choice / Safe, Affordable, Reliable	25	6	16	2
New ways of charging (peak vs. off peak, solar export tariffs)	Energy Choice / Safe, Affordable, Reliable	20	4	12	0
Electricity trading (peer to peer, community battery)	Energy Choice / Safe, Affordable, Reliable	19	8	32	18
Fast-track the infrastructure needed to connect	Growth	16	6	25	8
Education and data	Energy Choice	15	8	18	9
Underground cables	Resilience	15	4	6	2
Electric vehicles (ensure grid can cope with demand)	Energy Choice	15	6	19	10
Increase digital security	Resilience	9	2	14	2
Premium services	Energy Choice	5	1	6	2
Offer small & medium businesses a range of different services	Energy Choice / Safe, Affordable, Reliable	4	0	22	7
Tailored approaches to account management	Energy Choice	3	1	7	1

Like residents, SME customers also prioritised 'helping customers save money by adjusting when they use energy' - 37% placed this in their top three. 'Communications on disruptions' and 'electricity trading' were also a high priority (34% and 32% respectively placed these in their in top three).

Among residential customers, those with solar panels installed were more likely than those without to place 'Solar panel technology' in their top three (40% vs. 20%). Those who own an EV were more likely to place 'electricity trading' in their top three (60%) compared to those without (18%). Financially vulnerable were more likely to place 'communication on disruptions' in their top three (34%) compared to those not vulnerable (23%).



**Perceived importance of
potential actions: using
Maxdiff analysis**

An introduction to Maxdiff analysis

A technique to determine the relative importance of service provisions

The research explored what participants thought were the most important actions that Endeavour Energy should provide to customers in the lead up to 2029 using a Maxdiff experiment - a sophisticated form of **in-survey ranking**.

The **survey tested 24 factors** which were actions based on the core engagement themes of affordability, safety, reliability, resilience, growth and energy choices.

In the survey, participants were presented with a series of 18 sets of factors. **Each set contained four of the 24 factors selected randomly.**

For each set of four, participants were asked to choose which factor they believe is "Most important" and "Least important" for Endeavour Energy to provide to customers. Using the data from these exercises we were then able to determine the relative importance of each of the 24 specific factors via the Maxdiff analysis.

Subsequent slides present the outputs of the Maxdiff analysis as **"Preference shares (%)"**. This is an index out of a total of 100% to demonstrate the relative importance of each factor among all other factors. The higher the score the higher the importance placed on it.

Example survey question:

Most important	Factor	Least important
<input type="radio"/>	Reduce unplanned outages or blackouts for those living in outer urban and remote areas who typically face more outages than those in metro areas	<input checked="" type="radio"/>
<input type="radio"/>	Reduce Endeavour Energy's own carbon emissions as it moves towards Net Zero	<input type="radio"/>
<input checked="" type="radio"/>	Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays)	<input type="radio"/>
<input type="radio"/>	Support the capacity of the network to prepare for more electric vehicles and charging infrastructure	<input type="radio"/>

Relative importance of potential actions: Residential



Off-peak tariffs that charge customers less for their usage is considered the most important factor when considering future services, followed by safety to minimise the risk of electrical dangers and accessibility to data to enable customers to manage their usage.

 = Top 5 most important factors

Factor	Engagement theme	Preference share (%)
Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays)	Energy Choice	8
Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers	Safe, Affordable, Reliable	7
Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down	Energy Choice	6
Reduce unplanned outages or blackouts for all customers	Safe, Affordable, Reliable	6
Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want	Energy Choice	6
Be proactive in strengthening the electricity network to deal with an expected increase in major weather events	Resilience	5
Reduce unplanned outages or blackouts for those living in outer urban & remote areas who typically face more outages than metro areas	Safe, Affordable, Reliable	5
Cover bare overhead power lines in bushfire prone areas to reduce risk of sparking bushfires	Resilience	5
Reduce Endeavour Energy's own carbon emissions as it moves towards Net Zero	Safe, Affordable, Reliable	5
Support the capacity of the network to allow greater uptake of solar panels and batteries by customers	Growth /Energy Choice	5
More severe trimming of trees around power lines to reduce risk of sparking bushfires and trees falling on wires during storms	Resilience	4
Move existing power lines underground to reduce risk of sparking bushfires & risk of outages or blackouts (at significant cost to all customers)	Resilience	4
Maximise Endeavour Energy's employee productivity and efficiency to help keep electricity costs down	Safe, Affordable, Reliable	4
Reduce risk of hackers interrupting electricity supply or stealing customer data	Safe, Affordable, Reliable	4
Fast-track electricity infrastructure to help connect new customers in the growth areas such as in Western Sydney	Growth	4
Endeavour Energy trialling new technologies and ideas that could improve customer service, products and choices in the future	Energy Choice	3
Replace wooden poles with concrete or steel power poles to improve resilience during bushfires and floods	Resilience	3
Help customers buy and sell locally generated electricity within their community	Energy Choice	3
Support the capacity of the network to prepare for more electric vehicles and charging infrastructure	Growth / Energy Choice	3
Move existing power lines underground to improve the look of local communities (at significant cost to all customers)	Resilience	3
Offer customers lower prices to charge their electric vehicle when network costs are lowest (outside peak periods)	Energy Choice	3
Delay investment in the electricity grid to postpone cost increases for customers	Safe, Affordable, Reliable	2
Continue to allow customers unrestricted charging of electric vehicles at home at any time of the day	Energy Choice	2
Charge customers more when they use electricity at peak times (4-8pm weekdays) to reduce the need for extra investment in the grid	Energy Choice	2


Most important

Least important



Relative importance of potential actions: SMEs

SME customers considered undergrounding of power lines to minimize the risk bushfires and outages to be the most important factor in their future services. This was followed by off-peak pricing and accessibility to data to enable them to manage usage.

 = Top 5 most important factors

Factor	Engagement theme	Preference share(%)
Move existing power lines underground to reduce risk of sparking bushfires & risk of outages or blackouts (at significant cost to all customers)	Resilience	8
Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays)	Energy Choice	6
Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down	Energy Choice	5
Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers	Safe, Affordable, Reliable	5
Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want	Energy Choice	5
Reduce unplanned outages or blackouts for those living in outer urban and remote areas who typically face more outages than metro areas	Safe, Affordable, Reliable	5
Be proactive in strengthening the electricity network to deal with an expected increase in major weather events	Resilience	5
Support the capacity of the network to allow greater uptake of solar panels and batteries by customers	Growth / Energy Choice	4
Reduce Endeavour Energy's own carbon emissions as it moves towards Net Zero	Safe, Affordable, Reliable	4
Reduce unplanned outages or blackouts for all customers	Safe, Affordable, Reliable	4
Endeavour Energy trialling new technologies and ideas that could improve customer service, products and choices in the future	Energy Choice	4
Cover bare overhead power lines in bushfire prone areas to reduce risk of sparking bushfires	Resilience	4
Fast-track electricity infrastructure to help connect new customers in the growth areas such as in Western Sydney	Growth	4
Offer customers lower prices to charge their electric vehicle when network costs are lowest (outside peak periods)	Energy Choice	4
More severe trimming of trees around power lines to reduce risk of sparking bushfires and trees falling on wires during storms	Resilience	4
Maximise Endeavour Energy's employee productivity and efficiency to help keep electricity costs down	Safe, Affordable, Reliable	4
Reduce risk of hackers interrupting electricity supply or stealing customer data	Safe, Affordable, Reliable	4
Support the capacity of the network to prepare for more electric vehicles and charging infrastructure	Growth / Energy Choice	3
Replace wooden poles with concrete or steel power poles to improve resilience during bushfires and floods	Resilience	3
Move existing power lines underground to improve the look of local communities (at significant cost to all customers)	Resilience	3
Help customers buy and sell locally generated electricity within their community	Energy Choice	3
Charge customers more when they use electricity at peak times (4-8pm weekdays) to reduce the need for extra investment in the grid	Energy Choice	3
Continue to allow customers unrestricted charging of electric vehicles at home at any time of the day	Energy Choice	3
Delay investment in the electricity grid to postpone cost increases for customers	Safe, Affordable, Reliable	3

Most important

Least important

Appendices



Appendix 1: Breakdown of key results

Level of concern - Demographics 1: Residential



% Very + Extremely concerned	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
The reliability of your electricity supply	37%	37%	39%	37%	38%	37%	38%	38%	45%	27%	46%	44%	41%	48%
The cost of electricity	67%	68%	64%	69%	58%	76%	62%	71%	72%	63%	82%	72%	62%	63%
The cost of gas	44%	43%	50%	39%	41%	46%	47%	45%	46%	35%	51%	57%	27%	45%
Climate change	51%	50%	51%	53%	51%	52%	61%	41%	52%	51%	55%	58%	53%	56%
Being able to afford to pay your electricity bills	49%	50%	47%	51%	42%	56%	54%	52%	53%	34%	77%	54%	65%	53%
Impacts from major weather events like storms and floods	52%	53%	47%	54%	46%	57%	55%	50%	52%	49%	63%	58%	64%	61%
Impacts from extreme temperatures like heat waves and cold snaps	42%	43%	43%	41%	40%	45%	45%	41%	48%	35%	50%	49%	42%	53%
Impacts from bushfires	43%	45%	41%	41%	37%	48%	44%	37%	49%	41%	53%	49%	49%	56%
Drought and water supply	41%	41%	46%	37%	38%	44%	40%	36%	49%	41%	45%	51%	40%	50%
Coronavirus (COVID19)	37%	39%	32%	36%	34%	39%	30%	33%	39%	49%	42%	41%	31%	36%
The economy	63%	62%	66%	61%	61%	64%	64%	66%	64%	56%	68%	69%	57%	66%

Level of concern - Demographics 2: Residential



% Very + Extremely concerned	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Safety issues associated with electricity	26%	27%	28%	23%	24%	29%	29%	26%	30%	19%	34%	36%	25%	33%
Possibility of widespread electricity blackouts due to issues in the electricity market	43%	45%	41%	42%	40%	47%	40%	43%	49%	42%	54%	49%	40%	49%
Being able to keep your home cool in summer and warm in winter	43%	47%	36%	43%	39%	46%	46%	47%	46%	30%	58%	50%	66%	44%
The quality of health services	57%	54%	58%	61%	51%	63%	53%	58%	64%	54%	70%	64%	62%	66%
The quality of public transport	26%	26%	30%	22%	27%	25%	30%	24%	31%	17%	33%	36%	49%	27%
Roads and traffic congestion	35%	37%	43%	24%	34%	36%	35%	36%	42%	25%	43%	42%	31%	51%
The cost of living in general	77%	75%	75%	82%	72%	82%	80%	80%	79%	65%	90%	81%	76%	77%
Crime and personal security	37%	37%	39%	35%	35%	39%	38%	38%	39%	30%	46%	49%	41%	42%
Job opportunities and unemployment	37%	36%	36%	39%	35%	39%	45%	43%	38%	16%	51%	53%	38%	48%
Housing availability and affordability	58%	55%	60%	63%	53%	64%	70%	65%	53%	39%	70%	69%	63%	67%

Level of concern - Demographics 3: Residential



% Very + Extremely concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
The reliability of your electricity supply	37%	39%	47%	30%	47%	55%	55%	44%	37%	40%	46%
The cost of electricity	67%	63%	62%	42%	67%	69%	69%	70%	67%	66%	45%
The cost of gas	44%	43%	52%	40%	52%	56%	55%	55%	42%	46%	24%
Climate change	51%	49%	58%	42%	60%	66%	67%	54%	51%	57%	53%
Being able to afford to pay your electricity bills	49%	43%	51%	51%	51%	57%	61%	54%	49%	50%	41%
Impacts from major weather events like storms and floods	52%	52%	62%	74%	61%	66%	66%	52%	52%	56%	50%
Impacts from extreme temperatures like heat waves and cold snaps	42%	44%	43%	43%	47%	57%	54%	48%	42%	44%	47%
Impacts from bushfires	43%	44%	55%	51%	50%	60%	60%	49%	42%	48%	20%
Drought and water supply	41%	42%	50%	38%	51%	57%	55%	55%	39%	46%	37%
Coronavirus (COVID19)	37%	39%	55%	55%	40%	47%	49%	46%	35%	43%	35%
The economy	63%	62%	67%	58%	69%	75%	84%	71%	62%	67%	57%

Level of concern - Demographics 4: Residential



% Very + Extremely concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Safety issues associated with electricity	26%	28%	34%	36%	35%	41%	48%	37%	25%	33%	10%
Possibility of widespread electricity blackouts due to issues in the electricity market	43%	45%	49%	41%	46%	54%	53%	52%	42%	48%	27%
Being able to keep your home cool in summer and warm in winter	43%	40%	40%	28%	47%	56%	47%	46%	43%	46%	42%
The quality of health services	57%	58%	59%	52%	56%	67%	61%	68%	56%	59%	60%
The quality of public transport	26%	26%	41%	44%	35%	40%	38%	33%	25%	30%	24%
Roads and traffic congestion	35%	38%	38%	53%	39%	51%	40%	41%	34%	38%	23%
The cost of living in general	77%	72%	74%	48%	79%	82%	82%	88%	76%	77%	72%
Crime and personal security	37%	38%	45%	39%	45%	52%	51%	56%	34%	41%	21%
Job opportunities and unemployment	37%	37%	50%	42%	42%	46%	52%	58%	34%	41%	27%
Housing availability and affordability	58%	50%	57%	39%	66%	64%	63%	59%	58%	59%	54%

Level of concern - Demographics 1: SMEs



% Very + Extremely concerned	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
The reliability of your electricity supply	38%	36%	37%	60%	39%	36%	44%	48%
The cost of electricity	47%	45%	47%	60%	47%	48%	58%	50%
The cost of gas	43%	41%	41%	65%	44%	41%	41%	56%
Climate change	52%	50%	53%	60%	53%	48%	41%	64%
Being able to afford to pay your electricity bills	41%	40%	37%	65%	43%	34%	59%	48%
Impacts from major weather events like storms and floods	41%	41%	38%	55%	41%	41%	44%	52%
Impacts from extreme temperatures like heat waves and cold snaps	42%	42%	37%	60%	43%	36%	41%	52%
Impacts from bushfires	35%	33%	34%	55%	36%	32%	41%	47%
Drought and water supply	38%	35%	39%	50%	39%	34%	47%	50%
Coronavirus (COVID19)	44%	43%	42%	60%	41%	55%	53%	47%
The economy	60%	60%	55%	85%	58%	66%	68%	62%

Level of concern - Demographics 2: SMEs



% Very + Extremely concerned	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Safety issues associated with electricity	41%	42%	37%	55%	42%	38%	44%	50%
Possibility of widespread electricity blackouts due to issues in the electricity market	44%	41%	46%	55%	44%	43%	46%	50%
Being able to keep your business cool in summer and warm in winter	46%	43%	47%	60%	48%	36%	54%	53%
Skill and labour shortages	38%	36%	37%	60%	38%	41%	41%	41%
Supply chain challenges	50%	46%	54%	55%	48%	55%	56%	53%
The cost of doing business	47%	49%	40%	70%	49%	41%	56%	55%
Cyber security	44%	41%	43%	70%	41%	55%	54%	56%
Cashflow	47%	45%	44%	70%	49%	38%	63%	55%
Attracting and retaining customers	42%	41%	37%	75%	43%	39%	63%	41%

Level of concern - Demographics 3: SMEs



% Very + Extremely concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
The reliability of your electricity supply	38%	53%	46%	33%	36%	43%	38%	57%	34%	40%	0%
The cost of electricity	47%	60%	49%	45%	40%	51%	43%	54%	45%	48%	67%
The cost of gas	43%	46%	51%	39%	43%	48%	44%	63%	38%	43%	67%
Climate change	52%	58%	49%	39%	53%	58%	56%	57%	51%	53%	33%
Being able to afford to pay your electricity bills	41%	51%	51%	39%	39%	44%	41%	54%	37%	40%	33%
Impacts from major weather events like storms and floods	41%	50%	43%	33%	40%	46%	37%	48%	39%	41%	67%
Impacts from extreme temperatures like heat waves and cold snaps	42%	50%	49%	41%	45%	46%	43%	57%	37%	42%	67%
Impacts from bushfires	35%	42%	43%	35%	40%	43%	46%	56%	30%	36%	67%
Drought and water supply	38%	45%	45%	41%	39%	42%	41%	54%	34%	38%	67%
Coronavirus (COVID19)	44%	54%	45%	41%	44%	49%	47%	63%	39%	46%	100%
The economy	60%	62%	55%	47%	61%	58%	57%	65%	59%	59%	67%

Level of concern - Demographics 4: SMEs



% Very + Extremely concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Safety issues associated with electricity	41%	58%	50%	39%	39%	45%	46%	57%	37%	42%	33%
Possibility of widespread electricity blackouts due to issues in the electricity market	44%	59%	53%	43%	46%	47%	41%	59%	40%	46%	33%
Being able to keep your business cool in summer and warm in winter	46%	58%	59%	53%	45%	48%	47%	57%	43%	47%	67%
Skill and labour shortages	38%	46%	42%	43%	37%	44%	39%	56%	34%	38%	33%
Supply chain challenges	50%	59%	54%	51%	46%	55%	52%	72%	44%	51%	100%
The cost of doing business	47%	53%	49%	41%	47%	53%	41%	65%	43%	47%	67%
Cyber security	44%	63%	58%	55%	39%	45%	41%	67%	38%	45%	67%
Cashflow	47%	56%	53%	49%	40%	45%	41%	70%	41%	44%	100%
Attracting and retaining customers	42%	54%	43%	41%	39%	47%	36%	54%	39%	40%	33%

Change in concern - Demographics 1: Residential



% A little + Much more concerned	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
The reliability of your electricity supply	43%	48%	39%	40%	42%	44%	39%	47%	49%	37%	52%	45%	53%	45%
The cost of electricity	72%	73%	69%	73%	66%	78%	68%	72%	79%	68%	78%	76%	75%	65%
The cost of gas	52%	53%	57%	45%	49%	54%	55%	55%	52%	42%	52%	65%	33%	61%
Climate change	43%	42%	41%	46%	43%	43%	50%	37%	43%	42%	47%	51%	46%	45%
Being able to afford to pay your electricity bills	59%	58%	57%	62%	49%	68%	61%	63%	62%	45%	79%	57%	72%	51%
Impacts from major weather events like storms and floods	50%	53%	48%	45%	42%	57%	52%	54%	48%	42%	58%	51%	62%	49%
Impacts from extreme temperatures like heat waves and cold snaps	40%	43%	40%	37%	35%	46%	42%	39%	44%	36%	46%	48%	46%	44%
Impacts from bushfires	30%	33%	28%	27%	30%	31%	30%	31%	34%	25%	36%	38%	43%	40%
Drought and water supply	32%	36%	33%	27%	31%	34%	31%	32%	36%	30%	36%	43%	43%	43%
Coronavirus (COVID19)	29%	31%	29%	27%	26%	33%	28%	24%	33%	35%	34%	32%	29%	38%
The economy	72%	70%	74%	71%	68%	75%	69%	72%	77%	67%	76%	73%	56%	67%

Change in concern - Demographics 2: Residential



% A little + Much more concerned	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Safety issues associated with electricity	28%	30%	27%	25%	27%	29%	32%	29%	29%	19%	35%	42%	47%	47%
Possibility of widespread electricity blackouts due to issues in the electricity market	47%	52%	43%	42%	41%	52%	40%	49%	54%	44%	55%	47%	51%	36%
Being able to keep your home cool in summer and warm in winter	45%	48%	43%	42%	39%	51%	46%	45%	53%	35%	61%	49%	68%	48%
The quality of health services	52%	50%	48%	59%	46%	58%	49%	53%	56%	52%	62%	57%	64%	48%
The quality of public transport	28%	31%	27%	23%	29%	26%	28%	29%	32%	18%	31%	43%	49%	24%
Roads and traffic congestion	33%	35%	38%	24%	30%	35%	33%	32%	35%	32%	35%	38%	35%	45%
The cost of living in general	78%	78%	78%	79%	72%	83%	79%	81%	81%	69%	81%	79%	71%	71%
Crime and personal security	32%	36%	31%	25%	31%	32%	34%	35%	33%	20%	40%	44%	25%	41%
Job opportunities and unemployment	39%	39%	40%	37%	37%	41%	43%	44%	42%	19%	50%	51%	29%	46%
Housing availability and affordability	57%	58%	56%	55%	50%	63%	65%	65%	54%	37%	66%	66%	59%	60%

Change in concern - Demographics 3: Residential



% A little + Much more concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
The reliability of your electricity supply	43%	48%	42%	38%	45%	53%	50%	41%	44%	44%	33%
The cost of electricity	72%	71%	63%	58%	65%	65%	69%	65%	73%	71%	66%
The cost of gas	52%	56%	61%	45%	48%	51%	62%	52%	52%	52%	54%
Climate change	43%	44%	48%	58%	47%	53%	56%	42%	43%	49%	52%
Being able to afford to pay your electricity bills	59%	53%	57%	46%	59%	60%	63%	54%	59%	58%	41%
Impacts from major weather events like storms and floods	50%	41%	38%	53%	60%	59%	51%	42%	51%	52%	37%
Impacts from extreme temperatures like heat waves and cold snaps	40%	41%	31%	50%	47%	52%	46%	37%	41%	44%	46%
Impacts from bushfires	30%	30%	39%	43%	41%	42%	45%	35%	30%	36%	13%
Drought and water supply	32%	32%	39%	50%	44%	47%	45%	38%	32%	37%	25%
Coronavirus (COVID19)	29%	29%	30%	44%	34%	34%	35%	39%	28%	33%	30%
The economy	72%	69%	65%	68%	73%	74%	76%	66%	72%	71%	79%

Change in concern - Demographics 4: Residential



% A little + Much more concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Safety issues associated with electricity	28%	31%	44%	57%	36%	39%	45%	30%	28%	31%	13%
Possibility of widespread electricity blackouts due to issues in the electricity market	47%	45%	36%	20%	47%	53%	50%	49%	46%	47%	39%
Being able to keep your home cool in summer and warm in winter	45%	44%	48%	45%	43%	53%	58%	48%	45%	46%	60%
The quality of health services	52%	51%	51%	49%	60%	59%	53%	53%	52%	54%	48%
The quality of public transport	28%	28%	39%	47%	35%	40%	41%	27%	28%	31%	32%
Roads and traffic congestion	33%	32%	29%	31%	35%	44%	36%	29%	33%	34%	29%
The cost of living in general	78%	76%	69%	63%	75%	73%	74%	68%	79%	75%	68%
Crime and personal security	32%	33%	36%	53%	41%	44%	41%	31%	32%	35%	17%
Job opportunities and unemployment	39%	35%	46%	61%	46%	46%	50%	45%	38%	42%	27%
Housing availability and affordability	57%	48%	49%	49%	62%	62%	51%	47%	58%	56%	47%

Change in concern - Demographics 1: SME



% A little + Much more concerned	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
The reliability of your electricity supply	42%	42%	38%	55%	42%	39%	56%	45%
The cost of electricity	48%	49%	41%	80%	49%	45%	58%	45%
The cost of gas	38%	38%	36%	50%	41%	30%	47%	39%
Climate change	46%	45%	48%	40%	47%	41%	44%	45%
Being able to afford to pay your electricity bills	41%	41%	38%	60%	41%	41%	64%	41%
Impacts from major weather events like storms and floods	45%	48%	39%	60%	47%	39%	54%	53%
Impacts from extreme temperatures like heat waves and cold snaps	41%	41%	37%	60%	44%	30%	51%	59%
Impacts from bushfires	29%	30%	25%	45%	32%	20%	31%	41%
Drought and water supply	36%	35%	36%	40%	36%	34%	51%	45%
Coronavirus (COVID19)	40%	39%	38%	60%	42%	36%	41%	47%
The economy	59%	60%	55%	70%	60%	54%	58%	50%

Change in concern - Demographics 2: SME



% A little + Much more concerned	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Safety issues associated with electricity	33%	34%	30%	40%	33%	30%	36%	47%
Possibility of widespread electricity blackouts due to issues in the electricity market	40%	41%	37%	45%	41%	36%	53%	47%
Being able to keep your business cool in summer and warm in winter	34%	35%	30%	40%	35%	27%	39%	41%
Skill and labour shortages	40%	41%	32%	65%	40%	38%	54%	52%
Supply chain challenges	45%	44%	40%	70%	43%	50%	53%	52%
The cost of doing business	49%	48%	47%	70%	51%	45%	61%	48%
Cyber security	40%	41%	35%	60%	42%	34%	53%	50%
Cashflow	46%	46%	42%	65%	47%	41%	61%	45%
Attracting and retaining customers	39%	41%	32%	65%	39%	41%	53%	44%

Change in concern - Demographics 3: SME



% A little + Much more concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
The reliability of your electricity supply	42%	55%	55%	39%	39%	42%	36%	67%	35%	43%	33%
The cost of electricity	48%	63%	53%	41%	41%	47%	40%	63%	45%	48%	100%
The cost of gas	38%	49%	54%	43%	40%	42%	34%	61%	33%	41%	67%
Climate change	46%	51%	49%	37%	50%	53%	54%	54%	44%	46%	67%
Being able to afford to pay your electricity bills	41%	55%	49%	39%	34%	38%	33%	61%	36%	41%	67%
Impacts from major weather events like storms and floods	45%	62%	53%	47%	42%	48%	43%	59%	42%	46%	100%
Impacts from extreme temperatures like heat waves and cold snaps	41%	54%	49%	43%	40%	44%	45%	63%	36%	41%	100%
Impacts from bushfires	29%	40%	32%	22%	30%	33%	38%	44%	25%	29%	33%
Drought and water supply	36%	49%	49%	53%	36%	35%	32%	61%	29%	37%	67%
Coronavirus (COVID19)	40%	53%	54%	39%	40%	38%	47%	54%	37%	45%	0%
The economy	59%	62%	57%	35%	63%	63%	67%	69%	56%	59%	100%

Change in concern - Demographics 4: SME



% A little + Much more concerned	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Safety issues associated with electricity	33%	45%	43%	35%	37%	40%	34%	54%	27%	36%	33%
Possibility of widespread electricity blackouts due to issues in the electricity market	40%	47%	47%	49%	40%	41%	36%	59%	35%	40%	67%
Being able to keep your business cool in summer and warm in winter	34%	42%	42%	24%	33%	40%	34%	54%	28%	36%	33%
Skill and labour shortages	40%	58%	57%	43%	32%	36%	40%	50%	37%	40%	33%
Supply chain challenges	45%	55%	51%	33%	39%	41%	46%	59%	41%	45%	0%
The cost of doing business	49%	58%	51%	39%	43%	48%	48%	67%	45%	48%	100%
Cyber security	40%	60%	58%	49%	37%	35%	36%	65%	34%	41%	33%
Cashflow	46%	62%	59%	43%	35%	38%	38%	61%	42%	45%	33%
Attracting and retaining customers	39%	44%	38%	31%	38%	40%	38%	59%	34%	38%	33%

Awareness of Endeavour - Demographics: Residential



Aware of Endeavour Energy (%)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Yes	80%	79%	77%	86%	77%	83%	66%	81%	89%	90%	83%	71%	70%	73%
No	18%	20%	22%	13%	23%	14%	33%	17%	11%	8%	16%	27%	29%	25%
Don't Know	1%	1%	1%	1%	0%	2%	1%	2%	1%	2%	1%	3%	2%	2%

Aware of Endeavour Energy (%)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Yes	80%	79%	71%	65%	72%	71%	66%	100%	78%	79%	98%
No	18%	19%	28%	29%	27%	27%	31%	0%	21%	20%	2%
Don't Know	1%	2%	1%	6%	1%	2%	3%	0%	1%	1%	0%

Awareness of Endeavour - Demographics: SME



Aware of Endeavour Energy (%)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Yes	58%	57%	52%	95%	57%	61%	78%	73%
No	40%	41%	47%	5%	41%	38%	20%	27%
Don't Know	2%	3%	1%	0%	2%	2%	2%	0%

Aware of Endeavour Energy (%)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Yes	58%	71%	63%	45%	48%	54%	51%	100%	47%	56%	67%
No	40%	27%	33%	53%	50%	45%	49%	0%	51%	42%	33%
Don't Know	2%	3%	4%	2%	2%	1%	0%	0%	2%	2%	0%

Knowledge of Endeavour - Demographics 1: Residential



Knowledge about Endeavour Energy (%)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	788	402	215	171	226	562	272	239	163	114	231	130	27*	49
Nothing at all	19%	19%	22%	15%	11%	25%	12%	13%	18%	33%	19%	12%	11%	6%
A little bit	67%	67%	64%	69%	70%	65%	73%	75%	66%	53%	59%	78%	83%	62%
A fair bit	13%	12%	12%	16%	17%	10%	13%	12%	14%	13%	21%	9%	6%	27%
A lot	1%	2%	2%	0%	2%	0%	1%	0%	2%	1%	1%	1%	0%	6%
NET A bit + Nothing at all	86%	87%	87%	84%	81%	90%	86%	88%	84%	86%	78%	90%	94%	68%
NET A fair bit + A lot	14%	13%	13%	16%	19%	10%	14%	12%	16%	14%	22%	10%	6%	32%

Knowledge of Endeavour - Demographics 2: Residential



Knowledge about Endeavour Energy (%)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	788	206	49	19*	103	87	52	97	691	419	20*
Nothing at all	19%	16%	7%	3%	12%	14%	11%	0%	22%	13%	10%
A little bit	67%	68%	64%	79%	75%	69%	58%	0%	78%	68%	77%
A fair bit	13%	16%	27%	18%	11%	15%	26%	92%	0%	17%	8%
A lot	1%	0%	2%	0%	2%	2%	5%	8%	0%	1%	6%
NET A bit + Nothing at all	86%	84%	71%	82%	87%	83%	69%	0%	100%	82%	87%
NET A fair bit + A lot	14%	16%	29%	18%	13%	17%	31%	100%	0%	18%	13%

Knowledge of Endeavour - Demographics 1: SME



Knowledge about Endeavour Energy (%)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	153	81	53	19*	119	34	46	48
Nothing at all	5%	5%	0%	16%	5%	3%	7%	4%
A little bit	60%	59%	66%	47%	59%	65%	59%	56%
A fair bit	30%	26%	34%	37%	29%	32%	24%	33%
A lot	5%	10%	0%	0%	7%	0%	11%	6%
NET A bit + Nothing at all	65%	64%	66%	63%	64%	68%	65%	60%
NET A fair bit + A lot	35%	36%	34%	37%	36%	32%	35%	40%

Knowledge of Endeavour - Demographics 2: SME



Knowledge about Endeavour Energy (%)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	153	55	48	22*	52	49	44	54	99	128	2*
Nothing at all	5%	2%	0%	0%	2%	4%	2%	0%	7%	3%	0%
A little bit	60%	62%	50%	50%	52%	47%	52%	0%	93%	58%	50%
A fair bit	30%	31%	46%	41%	40%	41%	43%	85%	0%	33%	50%
A lot	5%	5%	4%	9%	6%	8%	2%	15%	0%	6%	0%
NET A bit + Nothing at all	65%	64%	50%	50%	54%	51%	55%	0%	100%	61%	50%
NET A fair bit + A lot	35%	36%	50%	50%	46%	49%	45%	100%	0%	39%	50%

Sentiment towards Endeavour – Demographics 1: Residential

Sentiment towards Endeavour Energy (%)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Very negative	1%	1%	1%	0%	1%	0%	0%	0%	2%	1%	1%	0%	0%	0%
Somewhat negative	2%	1%	1%	4%	3%	1%	1%	2%	0%	6%	2%	1%	5%	2%
Neither negative nor positive	37%	36%	38%	36%	31%	42%	34%	42%	42%	26%	34%	34%	40%	20%
Somewhat positive	38%	40%	36%	36%	38%	37%	43%	39%	31%	37%	35%	41%	30%	28%
Very positive	18%	17%	19%	20%	23%	14%	19%	13%	19%	24%	23%	20%	25%	45%
Really don't know	4%	5%	5%	3%	3%	5%	3%	4%	5%	6%	5%	4%	0%	5%
NET Negative	3%	2%	3%	4%	4%	2%	1%	2%	2%	7%	2%	1%	5%	2%
NET Positive	56%	57%	54%	57%	61%	51%	62%	52%	51%	61%	59%	62%	55%	73%



Sentiment towards Endeavour – Demographics 2: Residential

Sentiment towards Endeavour Energy (%)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Very negative	1%	1%	0%	0%	0%	0%	0%	3%	0%	0%	27%
Somewhat negative	2%	4%	7%	6%	0%	2%	1%	0%	2%	0%	73%
Neither negative nor positive	37%	35%	23%	26%	26%	28%	18%	23%	38%	0%	0%
Somewhat positive	38%	37%	49%	40%	49%	35%	51%	33%	38%	67%	0%
Very positive	18%	20%	20%	23%	21%	33%	28%	39%	16%	33%	0%
Really don't know	4%	3%	0%	6%	4%	2%	2%	2%	5%	0%	0%
NET Negative	3%	5%	7%	6%	0%	2%	1%	3%	3%	0%	100%
NET Positive	56%	57%	70%	63%	70%	68%	79%	72%	54%	100%	0%



Sentiment towards Endeavour – Demographics 1: SME



Sentiment towards Endeavour Energy (%)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Very negative	0%	0%	0%	0%	0%	0%	0%	0%
Somewhat negative	1%	2%	0%	0%	1%	2%	2%	0%
Neither negative nor positive	11%	8%	12%	30%	12%	7%	22%	11%
Somewhat positive	49%	50%	51%	40%	47%	59%	44%	47%
Very positive	37%	39%	36%	25%	38%	32%	31%	42%
Really don't know	1%	1%	1%	5%	1%	0%	2%	0%
NET Negative	1%	2%	0%	0%	1%	2%	2%	0%
NET Positive	86%	89%	87%	65%	85%	91%	75%	89%

Sentiment towards Endeavour – Demographics 2: SME



Sentiment towards Endeavour Energy (%)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Very negative	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%	0%
Somewhat negative	1%	1%	0%	2%	0%	1%	1%	2%	1%	0%	100%
Neither negative nor positive	11%	8%	9%	10%	6%	3%	7%	6%	13%	0%	0%
Somewhat positive	49%	51%	50%	59%	45%	45%	47%	39%	52%	57%	0%
Very positive	37%	40%	41%	29%	48%	49%	45%	54%	33%	43%	0%
Really don't know	1%	0%	0%	0%	1%	1%	0%	0%	1%	0%	0%
NET Negative	1%	1%	0%	2%	0%	1%	1%	2%	1%	0%	100%
NET Positive	86%	91%	91%	88%	93%	95%	92%	93%	85%	100%	0%

Current Service Ratings - Demographics 1: Residential



Ratings of current services (% Good + Excellent)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Reliable supply of electricity	61%	61%	59%	62%	63%	59%	60%	58%	61%	66%	61%	64%	57%	78%
Safety-related issues	54%	52%	56%	54%	59%	48%	54%	50%	56%	55%	50%	56%	45%	67%
Managing the network efficiently	50%	49%	50%	52%	56%	45%	49%	49%	49%	55%	49%	51%	50%	69%
Planning for the future	48%	49%	50%	45%	53%	43%	51%	46%	47%	47%	47%	55%	50%	71%
Responding to emergencies	57%	56%	54%	62%	61%	54%	54%	58%	58%	60%	58%	57%	63%	70%
Strengthening the network	46%	45%	46%	48%	51%	41%	48%	46%	47%	42%	47%	50%	56%	58%
Keeping customers informed	50%	48%	49%	56%	52%	48%	52%	44%	52%	53%	54%	50%	54%	76%
Prompt connections and disconnections	52%	49%	53%	55%	57%	47%	52%	51%	52%	53%	55%	46%	53%	73%
Helping vulnerable customers	47%	46%	48%	47%	52%	42%	50%	45%	45%	46%	50%	53%	50%	75%
New technologies	44%	44%	43%	46%	49%	40%	49%	40%	46%	41%	42%	50%	57%	73%
Maintaining streetlights	57%	55%	54%	64%	63%	52%	54%	53%	60%	65%	59%	57%	56%	71%
Tools to help manage electricity usage	46%	45%	44%	49%	50%	42%	51%	43%	45%	43%	53%	51%	67%	75%
Answering emergency telephone calls	39%	35%	41%	46%	41%	38%	41%	38%	37%	43%	43%	36%	41%	65%
Reading electricity meters	53%	50%	55%	57%	60%	47%	53%	48%	58%	54%	50%	62%	55%	67%

Current Service Ratings - Demographics 2: Residential



Ratings of current services (% Good + Excellent)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Reliable supply of electricity	61%	60%	63%	40%	62%	59%	71%	76%	59%	77%	23%
Safety-related issues	54%	55%	61%	42%	60%	58%	73%	72%	51%	71%	24%
Managing the network efficiently	50%	51%	52%	52%	54%	60%	64%	66%	48%	69%	12%
Planning for the future	48%	47%	51%	49%	57%	54%	61%	61%	46%	67%	24%
Responding to emergencies	57%	56%	62%	50%	61%	59%	65%	72%	55%	73%	19%
Strengthening the network	46%	47%	52%	53%	58%	54%	57%	60%	44%	63%	13%
Keeping customers informed	50%	50%	53%	35%	54%	57%	65%	70%	48%	67%	18%
Prompt connections and disconnections	52%	54%	56%	61%	56%	58%	62%	69%	50%	66%	31%
Helping vulnerable customers	47%	52%	61%	65%	56%	64%	62%	62%	45%	62%	10%
New technologies	44%	47%	50%	32%	56%	56%	64%	54%	43%	60%	19%
Maintaining streetlights	57%	56%	60%	56%	62%	63%	65%	69%	56%	71%	31%
Tools to help manage electricity usage	46%	45%	53%	53%	51%	57%	59%	65%	43%	61%	17%
Answering emergency telephone calls	39%	37%	36%	40%	47%	50%	55%	53%	38%	52%	3%
Reading electricity meters	53%	58%	60%	52%	57%	62%	69%	70%	51%	69%	49%

Current Service Ratings - Demographics 1: SME



Ratings of current services (% Good + Excellent)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Reliable supply of electricity	69%	69%	70%	65%	69%	66%	66%	73%
Safety-related issues	70%	68%	71%	80%	69%	73%	68%	77%
Managing the network efficiently	69%	72%	63%	75%	69%	66%	66%	76%
Planning for the future	66%	71%	62%	55%	68%	59%	54%	65%
Responding to emergencies	73%	75%	72%	70%	72%	77%	64%	76%
Strengthening the network	69%	68%	71%	70%	69%	68%	61%	70%
Keeping customers informed	68%	70%	64%	70%	68%	64%	63%	68%
Prompt connections and disconnections	66%	69%	63%	65%	67%	61%	56%	73%
Helping vulnerable customers	66%	64%	70%	55%	67%	59%	51%	73%
New technologies	66%	64%	71%	60%	69%	55%	63%	70%
Maintaining streetlights	67%	65%	69%	70%	67%	64%	69%	71%
Tools to help manage electricity usage	65%	63%	67%	65%	62%	73%	64%	62%
Answering emergency telephone calls	67%	67%	68%	65%	67%	68%	64%	76%
Reading electricity meters	62%	61%	67%	45%	65%	52%	49%	67%

Current Service Ratings - Demographics 2: SME



Ratings of current services (% Good + Excellent)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Reliable supply of electricity	69%	76%	76%	61%	73%	69%	75%	72%	68%	73%	0%
Safety-related issues	70%	73%	75%	63%	78%	76%	76%	80%	67%	74%	67%
Managing the network efficiently	69%	72%	76%	71%	72%	68%	71%	76%	67%	71%	33%
Planning for the future	66%	71%	71%	59%	74%	74%	80%	74%	64%	71%	33%
Responding to emergencies	73%	76%	75%	71%	78%	79%	84%	85%	70%	76%	33%
Strengthening the network	69%	68%	78%	69%	77%	77%	80%	74%	68%	72%	0%
Keeping customers informed	68%	69%	72%	63%	73%	75%	76%	81%	64%	71%	0%
Prompt connections and disconnections	66%	67%	72%	61%	72%	64%	76%	72%	64%	69%	0%
Helping vulnerable customers	66%	67%	79%	65%	73%	70%	75%	74%	64%	70%	0%
New technologies	66%	67%	75%	61%	75%	70%	74%	80%	63%	71%	33%
Maintaining streetlights	67%	69%	74%	76%	71%	74%	77%	74%	65%	72%	0%
Tools to help manage electricity usage	65%	63%	71%	57%	69%	67%	76%	69%	64%	70%	33%
Answering emergency telephone calls	67%	64%	68%	65%	71%	77%	76%	81%	64%	71%	0%
Reading electricity meters	62%	65%	75%	53%	71%	71%	74%	72%	59%	67%	0%

Current Service Priorities - Demographics 1: Residential



Ranking of current services (% Selecting in Top 3)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Reliable supply of electricity	56%	56%	57%	54%	55%	56%	47%	57%	55%	67%	48%	55%	26%	41%
Safety-related issues	19%	18%	23%	17%	20%	19%	25%	23%	14%	13%	19%	26%	24%	30%
Managing the network efficiently	30%	28%	32%	30%	30%	29%	26%	29%	32%	33%	25%	27%	25%	28%
Planning for the future	23%	23%	25%	21%	26%	20%	27%	21%	21%	22%	23%	25%	31%	24%
Responding to emergencies	32%	29%	32%	36%	31%	33%	29%	31%	35%	33%	29%	29%	28%	19%
Strengthening the network	19%	20%	18%	18%	24%	14%	20%	18%	20%	15%	18%	18%	13%	29%
Keeping customers informed	22%	22%	20%	23%	19%	24%	22%	24%	19%	21%	21%	18%	33%	17%
Prompt connections and disconnections	10%	11%	8%	10%	10%	9%	13%	10%	8%	7%	10%	15%	19%	24%
Helping vulnerable customers	23%	22%	24%	24%	17%	29%	20%	22%	29%	23%	36%	21%	21%	19%
New technologies	19%	19%	19%	19%	25%	14%	24%	21%	18%	11%	16%	26%	28%	27%
Maintaining streetlights	9%	11%	6%	10%	8%	11%	6%	10%	12%	11%	12%	12%	11%	2%
Tools to help manage electricity usage	11%	12%	11%	10%	9%	13%	12%	12%	7%	14%	13%	8%	14%	11%
Answering emergency telephone calls	13%	13%	10%	16%	13%	13%	14%	9%	15%	14%	16%	12%	15%	17%
Reading electricity meters	14%	16%	15%	11%	10%	18%	14%	13%	16%	14%	14%	9%	11%	12%

Current Service Priorities - Demographics 2: Residential



Ranking of current services (% Selecting in Top 3)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Reliable supply of electricity	56%	58%	46%	27%	51%	50%	49%	61%	55%	54%	57%
Safety-related issues	19%	21%	28%	31%	23%	23%	31%	20%	19%	23%	9%
Managing the network efficiently	30%	33%	12%	14%	23%	28%	17%	34%	29%	30%	50%
Planning for the future	23%	27%	25%	24%	26%	32%	36%	23%	23%	22%	34%
Responding to emergencies	32%	29%	32%	33%	28%	23%	22%	30%	32%	33%	10%
Strengthening the network	19%	21%	24%	18%	18%	21%	22%	21%	18%	20%	13%
Keeping customers informed	22%	24%	23%	18%	19%	14%	11%	24%	21%	22%	28%
Prompt connections and disconnections	10%	10%	18%	26%	12%	11%	16%	8%	10%	11%	4%
Helping vulnerable customers	23%	18%	20%	36%	17%	18%	18%	19%	24%	21%	18%
New technologies	19%	20%	20%	13%	26%	31%	35%	17%	19%	21%	32%
Maintaining streetlights	9%	8%	11%	7%	15%	13%	10%	6%	10%	7%	6%
Tools to help manage electricity usage	11%	10%	18%	18%	11%	13%	14%	7%	12%	10%	17%
Answering emergency telephone calls	13%	10%	12%	24%	17%	13%	8%	14%	13%	14%	6%
Reading electricity meters	14%	11%	11%	11%	15%	9%	12%	15%	14%	12%	14%

Current Service Priorities - Demographics 1: SME



Ranking of current services (% Selecting in Top 3)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Reliable supply of electricity	38%	40%	35%	45%	37%	45%	34%	29%
Safety-related issues	27%	23%	33%	25%	28%	23%	19%	33%
Managing the network efficiently	24%	24%	25%	20%	22%	34%	25%	20%
Planning for the future	24%	24%	24%	25%	25%	18%	25%	27%
Responding to emergencies	17%	17%	14%	25%	16%	18%	27%	11%
Strengthening the network	27%	23%	30%	35%	27%	27%	17%	29%
Keeping customers informed	24%	24%	23%	25%	24%	23%	27%	21%
Prompt connections and disconnections	12%	12%	12%	10%	12%	11%	15%	8%
Helping vulnerable customers	25%	26%	24%	25%	26%	21%	22%	18%
New technologies	25%	29%	23%	10%	24%	27%	25%	26%
Maintaining streetlights	14%	12%	18%	15%	13%	18%	15%	20%
Tools to help manage electricity usage	17%	19%	16%	10%	19%	9%	20%	23%
Answering emergency telephone calls	16%	17%	14%	15%	15%	18%	20%	26%
Reading electricity meters	11%	9%	12%	15%	11%	9%	7%	11%

Current Service Priorities - Demographics 2: SME



Ranking of current services (% Selecting in Top 3)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Reliable supply of electricity	38%	32%	33%	22%	34%	29%	31%	31%	40%	38%	33%
Safety-related issues	27%	17%	22%	27%	37%	35%	34%	35%	25%	25%	67%
Managing the network efficiently	24%	31%	29%	18%	19%	18%	24%	30%	23%	25%	33%
Planning for the future	24%	28%	28%	29%	22%	26%	21%	24%	24%	22%	0%
Responding to emergencies	17%	21%	18%	12%	11%	14%	13%	11%	18%	14%	33%
Strengthening the network	27%	27%	22%	18%	28%	27%	29%	24%	27%	28%	33%
Keeping customers informed	24%	35%	29%	33%	13%	19%	18%	26%	23%	24%	0%
Prompt connections and disconnections	12%	5%	14%	8%	16%	12%	14%	9%	12%	12%	0%
Helping vulnerable customers	25%	18%	21%	29%	28%	29%	24%	26%	25%	24%	0%
New technologies	25%	26%	22%	33%	30%	26%	28%	22%	26%	28%	0%
Maintaining streetlights	14%	13%	17%	16%	20%	16%	16%	15%	14%	15%	33%
Tools to help manage electricity usage	17%	18%	16%	33%	14%	16%	18%	20%	16%	17%	33%
Answering emergency telephone calls	16%	18%	20%	16%	17%	18%	16%	17%	16%	16%	33%
Reading electricity meters	11%	13%	8%	6%	13%	14%	14%	9%	11%	11%	0%

Importance of Future Services - Demographics 1: Residential

Importance of future services (% Quite + Very important)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Solar panel technology	70%	69%	71%	72%	70%	71%	77%	68%	70%	65%	70%	79%	62%	77%
Help customers save money by adjusting when they use energy	72%	70%	74%	73%	69%	75%	76%	66%	74%	71%	76%	79%	72%	80%
Using technology to save money	72%	68%	77%	75%	70%	75%	76%	69%	71%	74%	75%	77%	67%	76%
Reliability as the climate changes	72%	70%	67%	80%	69%	75%	78%	66%	72%	72%	73%	72%	71%	73%
Electricity trading	60%	60%	58%	62%	63%	58%	64%	58%	62%	56%	59%	73%	49%	76%
Help cut greenhouse gases	66%	65%	65%	70%	63%	69%	73%	60%	65%	67%	69%	71%	61%	67%
New ways of charging	64%	61%	66%	66%	62%	66%	68%	60%	64%	64%	65%	68%	72%	72%
Electric vehicles	58%	60%	60%	55%	61%	55%	62%	54%	60%	57%	56%	69%	60%	74%
Fast-track the infrastructure needed to connect	63%	62%	63%	64%	66%	60%	65%	56%	67%	65%	64%	67%	52%	71%
Communication on disruptions	77%	76%	71%	84%	72%	82%	75%	77%	79%	79%	81%	78%	71%	81%
Underground cables	59%	56%	57%	64%	61%	56%	64%	54%	59%	56%	59%	65%	65%	65%



Importance of Future Services – Demographics 2: Residential

Importance of future services (% Quite + Very important)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Education and data	61%	58%	61%	67%	56%	66%	66%	58%	60%	61%	68%	64%	60%	75%
Offer small and medium businesses a range of different services	49%	49%	46%	50%	49%	49%	50%	41%	55%	48%	55%	50%	40%	63%
Premium services	38%	36%	39%	41%	42%	35%	43%	34%	38%	38%	41%	48%	41%	56%
Increase digital security	69%	66%	73%	69%	64%	73%	73%	66%	72%	62%	73%	71%	78%	83%
Tailored approaches to account management	45%	47%	43%	46%	45%	45%	48%	41%	50%	43%	47%	52%	37%	69%



Importance of Future Services - Demographics 3: Residential

Importance of future services (% Quite + Very important)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Solar panel technology	70%	82%	73%	76%	78%	82%	74%	65%	71%	77%	69%
Help customers save money by adjusting when they use energy	72%	70%	73%	58%	80%	79%	84%	78%	71%	81%	63%
Using technology to save money	72%	73%	75%	75%	79%	78%	79%	78%	72%	79%	72%
Reliability as the climate changes	72%	75%	68%	67%	76%	78%	73%	71%	72%	77%	60%
Electricity trading	60%	65%	68%	55%	70%	74%	83%	63%	60%	68%	54%
Help cut greenhouse gases	66%	70%	68%	59%	64%	70%	76%	68%	66%	73%	50%
New ways of charging	64%	64%	58%	73%	69%	76%	70%	63%	64%	70%	48%
Electric vehicles	58%	65%	65%	60%	62%	72%	78%	57%	59%	63%	61%
Fast-track the infrastructure needed to connect	63%	68%	71%	65%	60%	71%	67%	72%	62%	71%	33%
Communication on disruptions	77%	78%	77%	75%	74%	80%	72%	85%	76%	81%	81%
Underground cables	59%	67%	69%	72%	52%	65%	64%	70%	57%	65%	51%



Importance of Future Services – Demographics 4: Residential

Importance of future services (% Quite + Very important)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Education and data	61%	64%	73%	66%	64%	66%	73%	69%	60%	69%	53%
Offer small and medium businesses a range of different services	49%	47%	49%	44%	54%	64%	59%	57%	47%	55%	18%
Premium services	38%	42%	50%	63%	41%	51%	53%	47%	37%	47%	24%
Increase digital security	69%	69%	62%	74%	80%	85%	79%	74%	68%	77%	53%
Tailored approaches to account management	45%	47%	43%	55%	51%	61%	67%	51%	45%	54%	18%



Importance of Future Services - Demographics 1: SME



Importance of future services (% Quite + Very important)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Solar panel technology	72%	75%	72%	55%	72%	71%	61%	74%
Help customers save money by adjusting when they use energy	78%	78%	77%	90%	80%	73%	69%	79%
Using technology to save money	74%	74%	75%	70%	78%	61%	64%	80%
Reliability as the climate changes	80%	76%	85%	80%	81%	75%	75%	91%
Electricity trading	68%	70%	65%	65%	67%	70%	66%	83%
Help cut greenhouse gases	71%	65%	78%	75%	71%	71%	63%	76%
New ways of charging	74%	73%	74%	85%	73%	79%	66%	85%
Electric vehicles	69%	66%	72%	75%	68%	71%	63%	79%
Fast-track the infrastructure needed to connect	71%	69%	72%	85%	72%	70%	69%	80%
Communication on disruptions	72%	72%	71%	85%	72%	75%	75%	76%
Underground cables	71%	71%	70%	85%	71%	73%	69%	74%

Importance of Future Services – Demographics 2: SME



Importance of future services (% Quite + Very important)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Education and data	73%	69%	76%	85%	72%	79%	69%	85%
Offer small and medium businesses a range of different services	72%	71%	74%	70%	71%	73%	68%	74%
Premium services	70%	69%	72%	75%	67%	80%	71%	74%
Increase digital security	74%	68%	81%	85%	74%	75%	73%	89%
Tailored approaches to account management	70%	69%	71%	75%	69%	75%	75%	79%

Importance of Future Services - Demographics 3: SME



Importance of future services (% Quite + Very important)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Solar panel technology	72%	77%	68%	57%	76%	77%	74%	78%	71%	74%	100%
Help customers save money by adjusting when they use energy	78%	85%	78%	63%	82%	81%	83%	85%	77%	81%	100%
Using technology to save money	74%	73%	75%	53%	80%	80%	83%	89%	70%	76%	67%
Reliability as the climate changes	80%	78%	80%	73%	86%	89%	82%	94%	76%	83%	67%
Electricity trading	68%	69%	74%	67%	74%	74%	75%	83%	64%	69%	67%
Help cut greenhouse gases	71%	71%	72%	57%	74%	75%	77%	85%	67%	73%	67%
New ways of charging	74%	77%	79%	69%	79%	77%	75%	83%	72%	77%	67%
Electric vehicles	69%	76%	75%	80%	78%	80%	77%	74%	68%	72%	67%
Fast-track the infrastructure needed to connect	71%	79%	78%	67%	74%	73%	76%	80%	69%	73%	33%
Communication on disruptions	72%	82%	82%	65%	72%	68%	70%	87%	69%	73%	67%
Underground cables	71%	81%	76%	73%	70%	75%	72%	87%	67%	72%	67%

Importance of Future Services – Demographics 4: SME



Importance of future services (% Quite + Very important)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Education and data	73%	81%	75%	69%	76%	78%	72%	83%	71%	76%	67%
Offer small and medium businesses a range of different services	72%	74%	74%	61%	75%	75%	75%	85%	68%	72%	67%
Premium services	70%	73%	75%	76%	72%	73%	80%	85%	66%	72%	33%
Increase digital security	74%	76%	75%	65%	83%	76%	83%	83%	72%	75%	67%
Tailored approaches to account management	70%	77%	74%	63%	71%	77%	72%	85%	66%	75%	67%

Ranking of Future Services - Demographics 1: Residential



Ranking of future services (% Selecting in Top 3)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Solar panel technology	26%	24%	27%	27%	26%	26%	29%	24%	27%	21%	18%	29%	27%	28%
Help customers save money by adjusting when they use energy	45%	45%	42%	48%	36%	53%	34%	46%	50%	54%	52%	36%	38%	31%
Using technology to save money	25%	25%	26%	25%	23%	28%	23%	23%	27%	29%	26%	24%	4%	26%
Reliability as the climate changes	29%	29%	32%	26%	31%	26%	26%	24%	34%	33%	25%	27%	17%	22%
Electricity trading	19%	19%	23%	15%	22%	16%	22%	24%	14%	13%	16%	24%	20%	20%
Help cut greenhouse gases	25%	24%	25%	27%	26%	25%	36%	16%	22%	27%	24%	26%	38%	26%
New ways of charging	20%	22%	20%	19%	15%	25%	17%	24%	19%	23%	21%	20%	19%	11%
Electric vehicles	15%	17%	18%	11%	19%	12%	17%	17%	14%	12%	16%	21%	18%	24%
Fast-track the infrastructure needed to connect	16%	15%	19%	16%	21%	12%	16%	15%	16%	18%	17%	15%	19%	30%
Communication on disruptions	26%	24%	22%	33%	24%	28%	24%	28%	23%	30%	34%	19%	31%	26%
Underground cables	15%	19%	10%	15%	17%	14%	10%	17%	18%	18%	16%	17%	21%	10%

Ranking of Future Services - Demographics 2: Residential



Ranking of future services (% Selecting in Top 3)	Total sample	Catchment area			Gender		Age				Residential Segments			
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Male	Female	18-24	35-49	50-64	65+	Financially vulnerable	CALD	ATSI	Innovator
N=	1,001	517	281	203	308	693	393	296	185	127	290	197	37	70
Education and data	15%	14%	17%	17%	16%	15%	22%	17%	12%	8%	16%	15%	30%	25%
Offer small and medium businesses a range of different services	4%	4%	4%	3%	4%	4%	4%	5%	4%	2%	4%	4%	4%	3%
Premium services	5%	5%	4%	5%	5%	4%	6%	4%	6%	3%	3%	7%	0%	5%
Increase digital security	9%	10%	9%	8%	10%	8%	10%	11%	9%	5%	9%	9%	14%	14%
Tailored approaches to account management	3%	3%	2%	5%	3%	3%	3%	3%	3%	4%	2%	4%	0%	0%

Ranking of Future Services - Demographics 3: Residential



Ranking of future services (% Selecting in Top 3)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Solar panel technology	26%	40%	27%	22%	33%	33%	28%	23%	26%	25%	40%
Help customers save money by adjusting when they use energy	45%	36%	43%	34%	37%	35%	36%	45%	45%	44%	54%
Using technology to save money	25%	20%	13%	4%	18%	13%	14%	21%	26%	24%	6%
Reliability as the climate changes	29%	28%	16%	4%	31%	39%	29%	28%	29%	31%	45%
Electricity trading	19%	25%	32%	60%	26%	20%	23%	12%	20%	20%	19%
Help cut greenhouse gases	25%	25%	30%	17%	25%	28%	30%	21%	26%	26%	26%
New ways of charging	20%	18%	11%	11%	21%	16%	12%	11%	22%	19%	18%
Electric vehicles	15%	19%	25%	28%	17%	23%	31%	16%	15%	15%	2%
Fast-track the infrastructure needed to connect	16%	19%	20%	23%	20%	20%	25%	23%	15%	17%	24%
Communication on disruptions	26%	19%	24%	39%	17%	11%	17%	37%	25%	25%	26%
Underground cables	15%	14%	7%	6%	13%	18%	10%	19%	15%	14%	15%

Ranking of Future Services - Demographics 4: Residential



Ranking of future services (% Selecting in Top 3)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	1,001	271	71	29*	142	122	84	97	904	548	21*
Education and data	15%	14%	28%	18%	17%	17%	20%	19%	15%	17%	20%
Offer small and medium businesses a range of different services	4%	6%	3%	2%	6%	7%	11%	6%	4%	4%	0%
Premium services	5%	6%	10%	10%	3%	4%	6%	5%	5%	4%	0%
Increase digital security	9%	7%	7%	15%	14%	14%	8%	10%	9%	10%	6%
Tailored approaches to account management	3%	4%	5%	7%	2%	2%	2%	4%	3%	2%	0%

Ranking of Future Services - Demographics 1: SME



Ranking of future services (% Selecting in Top 3)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Solar panel technology	15%	16%	15%	5%	17%	7%	22%	14%
Help customers save money by adjusting when they use energy	37%	36%	38%	35%	34%	48%	32%	35%
Using technology to save money	16%	14%	19%	20%	15%	20%	22%	14%
Reliability as the climate changes	23%	23%	23%	30%	24%	21%	15%	20%
Electricity trading	32%	33%	28%	40%	32%	30%	25%	35%
Help cut greenhouse gases	14%	12%	16%	15%	15%	9%	10%	14%
New ways of charging	12%	9%	16%	20%	11%	18%	15%	17%
Electric vehicles	19%	17%	24%	5%	21%	13%	17%	24%
Fast-track the infrastructure needed to connect	25%	22%	27%	25%	25%	23%	29%	24%
Communication on disruptions	34%	42%	25%	20%	35%	30%	36%	26%
Underground cables	6%	8%	3%	10%	7%	5%	17%	5%

Ranking of Future Services - Demographics 2: SME



Ranking of future services (% Selecting in Top 3)	Total sample	Catchment area			Business size (number of employees)		Business segments	
		North-western Sydney and Blue Mountains	South-western Sydney and Southern Highlands	Illawarra and South Coast	Less than 20	20-199	Financially vulnerable	Innovator
N=	265	143	102	20*	209	56	59	66
Education and data	18%	17%	18%	30%	18%	20%	15%	18%
Offer small and medium businesses a range of different services	22%	24%	19%	20%	22%	18%	17%	27%
Premium services	6%	6%	5%	10%	5%	7%	8%	3%
Increase digital security	14%	13%	17%	10%	14%	16%	10%	12%
Tailored approaches to account management	7%	6%	9%	0%	6%	11%	5%	12%

Ranking of Future Services - Demographics 3: SME



Ranking of future services (% Selecting in Top 3)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Solar panel technology	15%	13%	9%	10%	18%	19%	14%	19%	14%	15%	0%
Help customers save money by adjusting when they use energy	37%	38%	38%	39%	39%	40%	36%	35%	37%	38%	33%
Using technology to save money	16%	15%	13%	6%	15%	12%	15%	17%	16%	17%	0%
Reliability as the climate changes	23%	23%	18%	8%	21%	18%	18%	22%	24%	24%	0%
Electricity trading	32%	40%	43%	51%	35%	33%	43%	31%	32%	33%	33%
Help cut greenhouse gases	14%	14%	13%	12%	13%	15%	15%	11%	14%	12%	67%
New ways of charging	12%	14%	16%	14%	12%	13%	16%	19%	11%	13%	0%
Electric vehicles	19%	17%	24%	31%	26%	23%	26%	9%	21%	19%	0%
Fast-track the infrastructure needed to connect	25%	29%	25%	29%	17%	22%	20%	24%	25%	24%	0%
Communication on disruptions	34%	24%	34%	45%	39%	41%	37%	41%	32%	34%	67%
Underground cables	6%	5%	8%	6%	2%	2%	3%	7%	6%	3%	33%

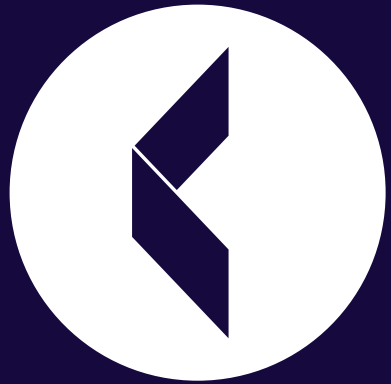
Ranking of Future Services - Demographics 4: SME



Ranking of future services (% Selecting in Top 3)	Total sample	Technology currently installed			Very or quite likely to install within the next 12 months			Knowledge about Endeavour Energy		Sentiment towards Endeavour Energy	
		Rooftop solar	Home storage battery	Electric vehicle	Rooftop solar	Home storage battery	Electric vehicle	Know a fair bit + know a lot	Know a little bit + nothing at all	Very or somewhat positive	Very or somewhat negative
N=	265	78	76	49	109	91	87	54	211	229	3*
Education and data	18%	18%	21%	16%	19%	22%	22%	9%	20%	18%	0%
Offer small and medium businesses a range of different services	22%	15%	14%	14%	20%	14%	9%	24%	21%	21%	33%
Premium services	6%	8%	4%	8%	4%	7%	8%	9%	5%	6%	0%
Increase digital security	14%	23%	13%	10%	14%	14%	15%	17%	14%	16%	33%
Tailored approaches to account management	7%	1%	4%	0%	6%	5%	3%	4%	8%	7%	0%

Maxdiff analysis: Analysis by key residential segments

Factor	Preference Share (% out of 100) by Segment			
	TOTAL Residential (n=1,001)	Financially vulnerable (n=274)	CALD (n=188)	Innovators (n=62)
Charge customers less for using electricity at off-peak times (outside 4-8pm weekdays)	8	8	7	7
Ensure the highest levels of safety to the community and staff by minimising the risk of electrical dangers	7	7	7	6
Provide easily accessible electricity usage data so customers can identify ways to manage their usage and keep costs down	6	6	6	6
Reduce unplanned outages or blackouts for all customers	6	6	5	5
Enable anyone with rooftop solar, batteries and electric vehicles to export as much energy to the grid as they want	6	5	6	6
Be proactive in strengthening the electricity network to deal with an expected increase in major weather events	5	5	5	5
Reduce unplanned outages or blackouts for those living in outer urban and remote areas who typically face more outages than those in metro areas	5	5	5	5
Cover bare overhead power lines in bushfire prone areas to reduce risk of sparking bushfires	5	5	5	4
Reduce Endeavour Energy's own carbon emissions as it moves towards Net Zero	5	5	5	5
Support the capacity of the network to allow greater uptake of solar panels and batteries by customers	5	4	5	5
More severe trimming of trees around power lines to reduce risk of sparking bushfires and trees falling on wires during storms	4	5	4	4
Move existing power lines underground to reduce the risk of sparking bushfires and risk of outages or blackouts (at significant cost to all customers)	4	5	4	4
Maximise Endeavour Energy's employee productivity and efficiency to help keep electricity costs down	4	4	4	4
Reduce risk of hackers interrupting electricity supply or stealing customer data	4	3	4	3
Fast-track electricity infrastructure to help connect new customers in the growth areas such as in Western Sydney	4	3	4	4
Endeavour Energy trialling new technologies and ideas that could improve customer service, products and choices in the future	3	3	4	4
Replace wooden poles with concrete or steel power poles to improve resilience during bushfires and floods	3	4	3	3
Help customers buy and sell locally generated electricity within their community	3	3	3	3
Support the capacity of the network to prepare for more electric vehicles and charging infrastructure	3	2	3	3
Move existing power lines underground to improve the look of local communities (at significant cost to all customers)	3	3	3	3
Offer customers lower prices to charge their electric vehicle when network costs are lowest (outside peak periods)	3	2	3	4
Delay investment in the electricity grid to postpone cost increases for customers	2	2	2	2
Continue to allow customers unrestricted charging of electric vehicles at home at any time of the day	2	2	2	2
Charge customers more when they use electricity at peak times (4-8pm weekdays) to reduce the need for extra investment in the grid	2	2	2	2



Appendix 2: Sample profile

Sample profile (unweighted)

General demographics

	Residential	SME
<i>N=</i>	<i>1,001</i>	<i>265</i>
Age (%)		
18-34	39	62
35-49	30	32
50-64	18	5
65+	13	1
Gender (%)		
Male	31	81
Female	69	19
Employment status (%)		
Working full time	43	59
Working part time	17	3
Working casually	5	1
Retired	12	0
Self-employed	4	40
Unemployed	6	0
Full time student	4	0
Full time home / parent duties	10	0
Other (please specify)	1	0

	Residential	SME
<i>N=</i>	<i>1,001</i>	<i>265</i>
Education attainment (%)		
Postgraduate degree	9	9
Graduate diploma / certificate	9	3
Bachelor degree	28	75
Advanced diploma / diploma	12	4
Technical certificate	16	3
High school	25	5
Primary school	0	0
Other	1	0
Identify as Aboriginal or Torres Strait Islander (%)		
Yes	4	6
No	95	94
Prefer not to say	1	0
Speak a language other than English at home or with close family members (%)		
Yes	20	9
No	79	91
Prefer not to say	1	0
Was born overseas (%)		
Yes	20	6
No	79	94
Prefer not to say	0	0

Sample profile (unweighted)

General demographics

	Residential	SME
N=	205	25 *
Language spoken (%) - Asked of those who speak a language other than English at home or with close family members		
Afrikaans	1	4
Arabic	9	8
Aramaic	1	0
Assyrian	1	0
Bengali	2	8
Cantonese	6	12
Croatian	4	4
Dinka	0	0
Dutch	0	0
Filipino	1	0
French	2	0
German	1	0
Greek	4	0
Hindi	9	8
Hungarian	1	0
Italian	6	12
Japanese	1	0
Korean	2	0
Maltese	1	0
Mandarin	2	0
Macedonian	3	0

	Residential	SME
N=	205	25 *
Language spoken (%) - Asked of those speak a language other than English at home or with close family members		
Nepali	2	0
Polish	2	0
Punjabi	1	0
Samoan	1	0
Serbian	3	4
Sinhalese	0	0
Spanish	5	8
Tagalog	9	4
Tamil	1	0
Urdu	0	0
Vietnamese	6	12
Bosnia	0	0
Sri Lanka	0	4
Egyptian	1	0
Hong Kong	0	0
Other (please specify)	13	9

Sample profile (unweighted)

General demographics

Birth country (%) - Asked of those born overseas	Residential
<i>N=</i>	<i>205</i>
Argentina	2
Australia	2
Bangladesh	1
Canada	1
China	3
Croatia	1
England	18
Egypt	1
Fiji	1
Germany	1
Greece	0
Hong Kong	3
Hungary	1
India	9
Iran	1
Iraq	1
Italy	2
Korea	3
Malaysia	2
Malta	1

Birth country (%) - Asked of those born overseas	Residential
<i>N=</i>	<i>205</i>
Mauritius	1
Nepal	3
New Zealand	7
Philippines	9
Poland	1
Samoa	0
Scotland	0
Serbia	1
South Africa	3
Sri Lanka	1
Spain	0
Sudan	0
Turkey	0
Ukraine	1
USA	2
Vietnam	1
Zimbabwe	1
Other (Please specify)	10

Sample profile (unweighted)

Energy and technology demographics

	Residential	SME
N=	1,001	265
Energy technologies already installed (Yes %)		
Piped natural gas i.e. mean mains connected gas, not bottled gas	54	42
Rooftop solar panels	27	29
Solar hot water system	16	31
A battery system for storing electricity	7	29
An electric vehicle	3	18
An electric vehicle charging station	3	14
A smart meter	31	43
Describing tendency to adopt new technology (%)		
I would probably be one of the very first to know about it and try it (INNOVATOR)	7	25
I would probably use it before most other people I know (EARLY ADOPTER)	17	35
I would probably wait until some people I know personally have used it before I do (EARLY MAJORITY)	48	31
I would probably wait until most other people have used it before I do (LATE MAJORITY)	20	8
I probably wouldn't be interested, and would only use it if I really had to (LATE ADOPTER)	8	1

	Residential	SME
N=	1,001	265
Knowledge of property's retail pricing plan (%)		
Time of use (different cost for peak, off-peak and shoulder periods)	21	37
Flat or single rate (same cents/kWh rate regardless of when electricity is used)	30	31
Controlled load (you would likely be on this plan if you have an off-peak hot water system)	12	15
Demand (based on maximum half hourly peak demand for a month)	3	5
Other plan (please describe)	0	0
Don't know	34	11
Knowledge of home or business being in an embedded network (%) - Asked only of SMEs and Residential customers not living in a freestanding house		
N=	242	263
Yes	25	31
No	60	60
Don't know	15	9

Sample profile (unweighted)

Property and household demographics

	Residential
N=	1,001
Home type (%)	
Freestanding house	76
Semi-detached house e.g row or terrace house, townhouse, duplex	12
Flat or apartment	11
Retirement village	1
Caravan park	0
Other type of home (please specify)	0
Home ownership (%)	
Renting your home	36
Paying off a mortgage	43
Own your home outright	19
Other (please specify)	2

	Residential
N=	1,001
Annual household income, before tax (%)	
Negative or zero income	0
\$1 - \$9,999 (\$1- \$189 per week)	1
\$10,000 - \$19,999 (\$190 - \$379 per week)	1
\$20,000 - \$29,999 (\$380 - \$579 per week)	7
\$30,000 - \$39,999 (\$580 - \$769 per week)	5
\$40,000 - \$49,999 (\$770 - \$959 per week)	4
\$50,000 - \$59,999 (\$960 - \$1,149 per week)	6
\$60,000 - \$79,999 (\$1,150 - \$1,529 per week)	11
\$80,000 - \$99,999 (\$1,530 - \$1,919 per week)	11
\$100,000 - \$124,999 (\$1,920 - \$2,399 per week)	13
\$125,000 - \$149,999 (\$2,400 - \$2,879 per week)	11
\$150,000 - \$199,999 (\$2,880 - \$3,839 per week)	12
\$200,000 - \$249,999 (\$3,840 - \$4,807 per week)	5
\$250,000 or more (\$4,808 or more per week)	3
I'd prefer not to say	6
I am not sure	3

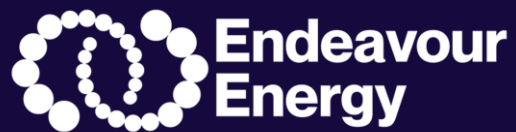
D6 Which of these best describes the home that you live in? / D11 Do you own your own home outright, are you paying off a mortgage or are you renting the home you live in?? / D16 What is the combined annual income of everyone in your household, from all sources before tax or other deductions? Please include income from all sources, including wages, investments, government pensions and benefits etc. Your best estimate is fine. Base: All Residential participants (n=1,001)

Sample profile (unweighted)

Vulnerability indicators

	Residential	SME
N=	1,001	265
Current financial situation (%)		
Doing well and feeling comfortable	22	45
Doing OK and making ends meet	51	49
Having some difficulty but just making ends meet	21	5
Having a lot of difficulty making ends meet	6	1
Characteristic applies to them (% yes)		
I have a special payment arrangement with energy provider due to financial difficulty	8	-
I recently experienced a natural disaster such as flooding, drought or bushfires in my area	40	-
I am in an area that is prone to natural disasters such as flooding, drought or bushfires	35	-
I have a Centrelink Healthcare or Pensioner card	27	-
Someone in my household has a disability, chronic illness or was recently seriously injured	16	-
I am a single parent	18	-
I moved here from a mainly non-English speaking country in the past two years	2	-
My home has life support equipment which requires a continuous supply of electricity	5	-
I receive a government rebate or concession on our energy bills	23	-
Most or all of my income is from a government payment	20	-
My business has a special payment arrangement with energy provider due to financial difficulty	-	11
My business recently experienced a natural disaster such as flooding, drought or bushfires in the local area	-	16
My business is in an area that is prone to natural disasters such as flooding, drought or bushfires	-	16

	Residential	SME
N=	1,001	265
Characteristic applies to them - In the last 12 months they... (% yes)		
Had the energy supply disconnected due to missed or late bills	2	9
Avoided turning on heating or cooling to save money	57	17
Missed or been late paying energy bills	16	11
Had unforeseen circumstances that severely affected the financial situation of the household (e.g. job loss, retirement)	19	-
Had a reduction in household income	33	-
Had a baby	3	-
Moved out of the family home for the first time	0	-
Separated from my partner/spouse	0	-
Had a member of the household pass away	0	-
Purchased a home with a mortgage	6	-
Had unforeseen circumstances that severely affected the financial situation of the business	-	16
Had a reduction in business income	-	22
Had to use personal savings or personal income to pay employee wages or other business-related expenses	-	16
Had to reduce staff hours or shifts due to financial difficulty	-	13
Had to lay off staff due to financial difficulty	-	9



Thank You