Australian Energy Market Commission.

2018 Retail Competition Review – Small Business.

colmar brunton.

Contents.

colmar brunton.

Background and methodology

Background

Established in 2005 by the Council of Australian Governments (COAG), The Australian Energy Market Commission (AEMC) is responsible for making rules which govern the nation's electricity and natural gas markets. In doing so, AEMC aims to protect the interests of consumers by promoting healthy retail competition within these markets.

The AEMC's annual Retail Competition Review represents a key tool for assessing whether the energy market is operating effectively. Originally, the Review was established in 2014 to support NEM jurisdictions in removing the retail price regulation set by the government, replacing it with prices set by private energy companies. As the retail energy markets have become deregulated, the 2017 Review focused on how competition has developed within these markets and whether this is creating beneficial outcomes for consumers.

The 2017 Review highlighted how price is the main motivator for switching energy retailers. Out of those small business consumers who reported switching retailers at least once in the past five years, 47 per cent switched after being offered a discount or a better price, and a further 28 per cent switched because they wanted a cheaper price. Also of note is that in the past five years, 54 per cent of small business electricity consumers reported that they have not switched their energy plan or retailer.

The 2018 review is the fifth of its kind. While previous consumer research has spanned both residential and small business customers, in 2018 the AEMC has conducted research with small business customers only.

Methodology

Colmar Brunton undertook a mixed methodology approach to the 2018 small business study encompassing both:

- A survey of n=400 business operators via computer assisted telephone interviewing (CATI) using a purchased sample of businesses that is representative of the small business population across the NEM and ECGM; and
- An online survey of n=440 businesses from the Quality Online Research (QOR) panel of around 20,000 small to medium-sized business operators.

This split sample approach was undertaken in order to explore any differences in responses across these two groups, with a view to potentially migrating the business survey online for future waves.

On completion of fieldwork, the two samples were compared across all responses. It was judged that there were too many statistically significant differences to merge the two samples (that is, the different data collection approaches produced different results).

As such, this report is presented in two parts:

- Chapter 1 utilises the CATI data only (n=400) for the purposes of time-series analysis versus the previous study in 2017 (which was also conducted via CATI) for both the whole of the NEM (Part 1A) and at the state and territory level (Part 1B);
- Chapter 2 utilises the merged CATI and online data from 2018 for the purposes of facilitating a more comprehensive review of the results by factor including state, industry sector and size of business.

Methodology (continued)

Data collection

Phone (CATI) survey fieldwork was undertaken by Q&A Research, a professional data collection company. The survey was undertaken using specified quotas by location, business size and industry type to ensure a robust cross-section of businesses were obtained in the sample. Businesses were sampled from the "Business Australia" List which includes 595,718 Australian businesses. The CATI survey was in field from 6 to 23 February 2018.

The online survey fieldwork was undertaken by Quality Online Research (QOR) using their small business research panel. The online survey fieldwork was undertaken between 13 and 23 February 2018.

The median survey length for each data collection approach was approximately 20 minutes.

Weighting

A disproportionate, stratified sampling approach was used in undertaking both the CATI and online survey components of the study to facilitate comparison of results by location and business size. Minimum quotas by industry type were also set to ensure the data was representative of the broader small business population.

The survey data was then post weighted using the latest available ABS business counts data by location (8165.0 - Counts of Australian Businesses, including Entries and Exits).

For further detail on the final sample profile achieved and weighting approach applied to the data, please see Appendix A – Data Weighting.

Significance testing

Where appropriate, statistical comparisons were undertaken within this report between sub-groups and the total, with differences tested for statistical significance at the 95% confidence level (note: significance testing could not be undertaken on sample sizes smaller than n=30).

In tables and graphs, a result that is significantly higher compared to either the previous survey in 2017 (in Chapter 1) or the total (in Chapter 2) has been coloured blue or identified with a ↑ . Conversely, a statistically significant lower result compared to 2017 or the total has been coloured red or identified with a ↓.

An exception reporting approach has been undertaken in that if no statistical significance was mentioned, there was none associated with these groups.

Executive summary

Executive Summary

Overall satisfaction, customer service & value for money

The 2018 findings saw a decrease in overall satisfaction with electricity providers (average of 3.5 on a 1-5 satisfaction scale, down from 3.8 observed in 2017) to the lowest point observed since the survey's inception in 2014. This was driven primarily by a decline in satisfaction among those using smaller providers (e.g. outside the top three providers in the market). Satisfaction with gas providers remained broadly unchanged from levels observed in previous waves of the study.

Average satisfaction with the customer service provided by electricity retailers has declined significantly since 2017 (7.0 in 2017 to 6.3 in 2018) to levels last observed in 2015 (6.5). However, satisfaction with the customer service from gas providers increased in 2018 (up to 7.7 from 7.2 in 2017).

Satisfaction with value for money from electricity providers has declined slightly in 2018 (5.8, down from 6.1 in 2017) to levels last seen in 2015 (as per overall satisfaction, driven largely by a rise in dissatisfaction with value for money among businesses using providers outside of the top three). Interestingly, perceptions of value for money for gas providers have increased slightly in 2018 (6.6, up from 6.2 in 2017) to levels last observed in 2014 (6.5).

Executive Summary

Understanding of, and satisfaction with, choice in the market

	While awareness of choice remained relatively high overall (91% of all businesses operating in the NEM were aware businesses in their state/territory can choose their electricity company), there has been a significant increase in the proportion of businesses indicating a lack of choice in electricity companies since 2017 (8%, up from 2% in 2017). A similar significant rise was observed in the proportion of businesses replying ‘false’ to the statement “Businesses in your state/territory can choose from a range of different types of electricity plans, price structures, contract lengths and terms” (up to 12% in 2018 from the 5% seen in 2017). Awareness of choice in gas providers was high and broadly unchanged from 2017 levels (although there was a further continuation of the upwards trend in awareness of choice of gas provider and plan).
	Average satisfaction with the level of choice of energy companies has significantly declined since 2017 (3.6 in 2017 to 3.4 in 2018). This wave saw the highest ever proportion of strong dissatisfaction (‘very dissatisfied’) with choice of energy companies and plans (11% in 2018, up from 5% in 2017). Not surprisingly, those unaware of the ability to choose providers were significantly more likely to be dissatisfied with the level of choice available.
	This wave saw a decrease in self-rated confidence in finding the right information to help businesses choose an energy plan that suits their business’s needs (7.1 in 2017 to 6.5 in 2018), reversing an upwards trend observed since 2015 (but still higher than the level observed in the first wave of the study in 2014).

Executive Summary

Investigating alternate offers in the energy market

Around one-third of businesses (35%) reported having actively investigated different energy offers or options, broadly in line with proportions observed in 2017 and previous iterations of the study. Unsurprisingly, those who state they are currently looking for a better deal or have recently switched are more likely to have actively investigated energy offers in the past 12 months.

While ‘Google/internet searching’ remained the most common information sources used to investigate switching options among business operators (28%), in 2018 there were significant increases for ‘phoning a retailer’ (23%, up from 12% in 2017), ‘retailer websites’ (22%, up from 12% in 2017) and ‘receiving a call from a salesperson’ (17%, up from 1%). There were no differences observed in information sources among those who did subsequently switch and those that did not.

Unprompted awareness of comparison websites was observed to dip sharply in the 2018 study (22% aware, down from 41% in 2017), reversing a previously observed rising trend. The 2018 result was the lowest level observed since the study commenced in 2014. This is an intriguing result, and may be driven by our different sampling approach from the previous study – or could perhaps reflect a growing level of market saturation with these and similar comparison websites.

There was a significant increase in the number of business operators who reported being approached by an alternate energy company over the past 12 months (79%, up from 49% in 2017). Phone was the most dominant channel that businesses recalled being contacted by in 2018, which significantly increased from 57% in 2017 to 90% in 2018.

Executive Summary

Switching attitudes, intentions and behaviours

Just over half of all businesses (54%) indicated a propensity to switch energy providers in 2018 – down from 59% in 2017 but in line with levels observed in previous years. While there was a significant decline in the proportion of small businesses who were actively looking for a better deal (5%, down from 13% in 2017), this was accompanied by a significant increase in the proportion who had recently switched (18%, up from 7% in 2017) and a significant decrease in those who are not interested in switching supplier or plan (19%, down from 26% in 2017).

There was a significant increase in agreement with the statement "I would switch my energy company if I was not satisfied with my current company" (up to an average of 4.6 on a 1 to 5 scale, up from 4.1 in 2017), suggesting most businesses feel a high degree of agency to move if dissatisfaction with their energy provider is an issue. If a degree of dissatisfaction is not present, the 2018 data suggests switching is far less likely due to a combination of 'a lack of time or energy to find a better deal' (3.4, up from 3.1 in 2017), a 'preference to reduce cost through reducing energy consumption' (3.8, up from 3.1 in 2017) or 'a lack of trust in providers promising a better deal' (3.8, up from 3.6 in 2017).

There was a surge in the proportion of businesses reporting switching an energy provider over both the past five years (70%, well up on the 47% observed in 2017) and also over the past 12 months (32%, up from 20% in 2017).

In line with previous waves, the dominant reason cited for switching was securing a better price. Of note, the average rated importance of all other factors (such as customer service, company reputation or infrastructure inducements such as meters or technology upgrades) were all observed to decline significantly in 2018.

Executive Summary

Switching outcomes & bill shocks

	Encouragingly, those that reported switching provider or plan within the past 5 years were generally very satisfied with the outcome - in 2018, there were significant increases in agreement that businesses were happy with their most recent switching decision (4.4, up from 3.9 in 2017) and that they were satisfied with the process involved in switching (4.3, up from 3.9). Most (77%) also agreed that their confidence in switching was driven by sufficient and transparent information regarding alternate offers (new question in 2018)
	Some 36% reported experiencing a degree of bill shock at least once over the past few years (broadly in line with the 38% observed in 2017). The main driver of the surprise bill was identified as rises in the underlying charges for the energy consumed (60%), followed by increases in energy use (27%). The most common responses to these larger than expected bills was either absorbing this rise with no further action (53%), followed by making efforts to reduce energy use (51%). Far fewer said they had investigated alternate retailers (17%) or actually switched retailers (16%) as a result.

Executive Summary

Conclusions and recommendations

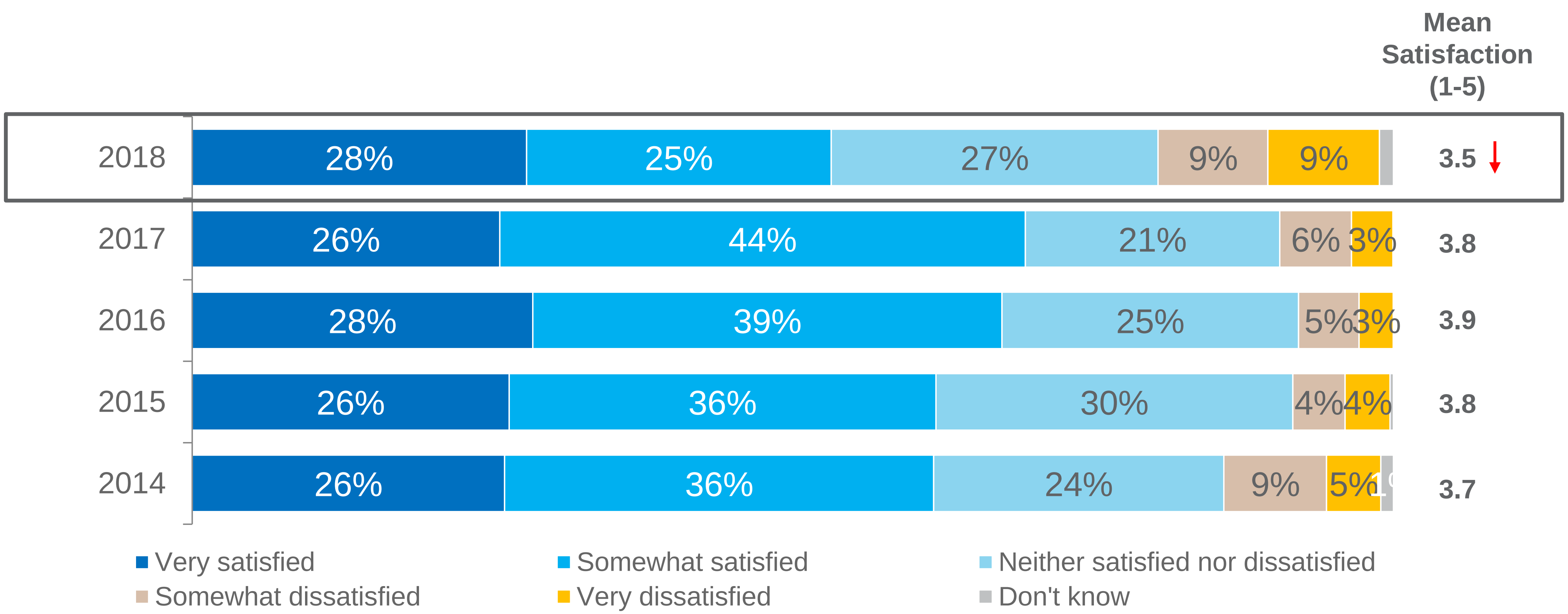
	With declines in overall satisfaction, perceived value for money, and level of choice in the market, it is perhaps not surprising that the 2018 small business study saw jumps in the reported incidence of switching behaviours – which is the desired outcome in any healthy and competitive market. Of some concern is the rise observed in businesses who are unaware of the opportunity to switch, suggesting an ongoing role for communication in reminding all NEM / ECGM based businesses to explore the market if dissatisfied with their current provider.
	The results suggest that being time poor, and a lack of faith that switching could result in sufficient benefits are two potential key barriers to switching. Given the very positive outcomes observed for those business operators that have switched providers, it may be worth the AEMC encouraging case-study type examples showcasing how easy it can be for a business to switch and the benefits obtained by switching – with a sharp focus on price/cost benefits (given its dominance as a driver of switching over all other factors).
	Given the drop in recall of price comparison sites, we would encourage stakeholders to consider if these information resources are being sufficiently pitched at the small business market – our assessment of current promotional activities is that these are aimed far more at a household or consumer market.
	We believe there is scope to get more businesses to reconsider if they are genuinely satisfied with their current energy providers through provision of benchmark data that would allow a business operator to potentially assess what they are paying (e.g. $ per kilowatt hour or per mega joule) vs. the average price in the market at a specific consumption level (noting larger users are observed to receive discounts far more so than smaller business operators).
	The importance placed on energy costs & decline in importance of energy infrastructure upgrades in switching behaviours, along with a significant increase in the proportion of businesses saying they 'definitely won't' take up a range or energy saving measures suggests any promotion of such technology to business operators needs to focus far more on the return on investment and payback period, and that financial incentives may be required to drive greater take-up in the near term.

Chapter 1A – Time series comparisons (whole of NEM)

Satisfaction with current energy providers

Overall satisfaction with current electricity provider

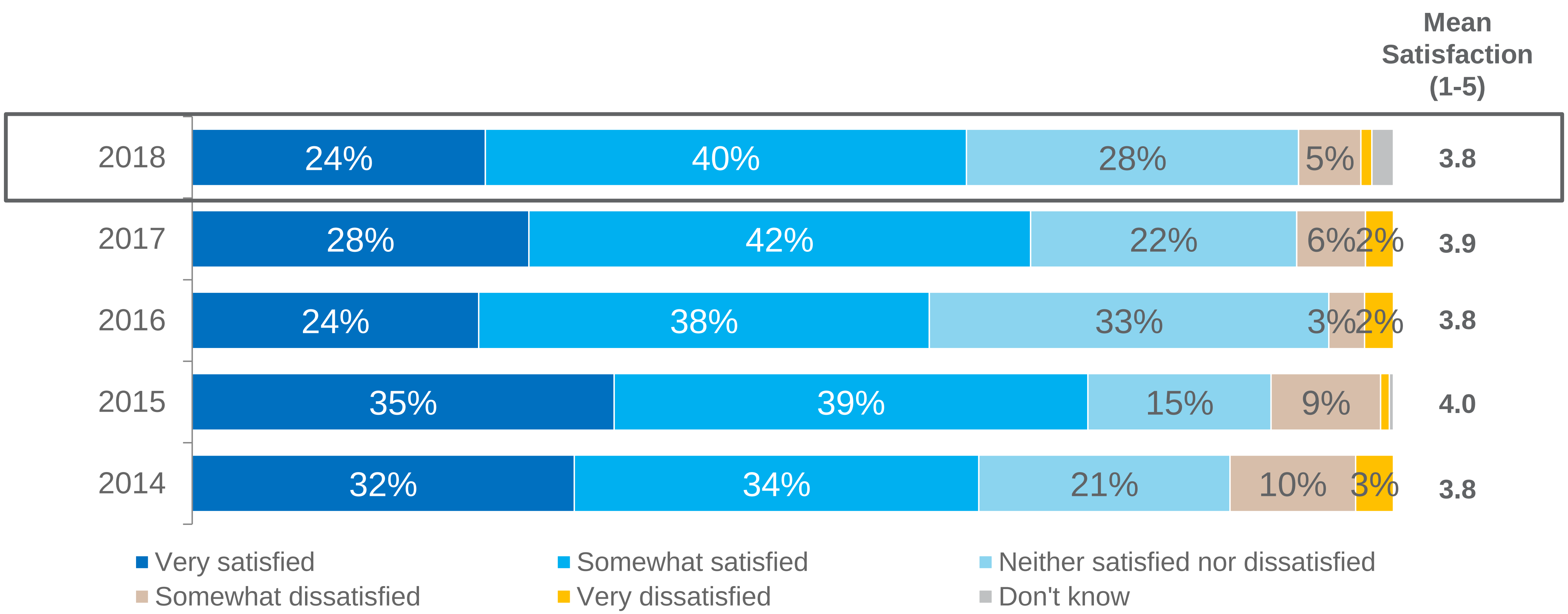
- In 2018, a statistically significant decrease in mean overall satisfaction with electricity providers was observed since the 2017 study (3.8 in 2017 to 3.5 in 2018).
- This is the lowest average satisfaction observed since the study commenced in 2014.
- The decrease in overall satisfaction was driven largely by an increase in the proportion of dissatisfied businesses.
- No statistically significant differences were observed in overall satisfaction with electricity provider by business size, location and industry type in 2018.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Overall satisfaction with current gas provider

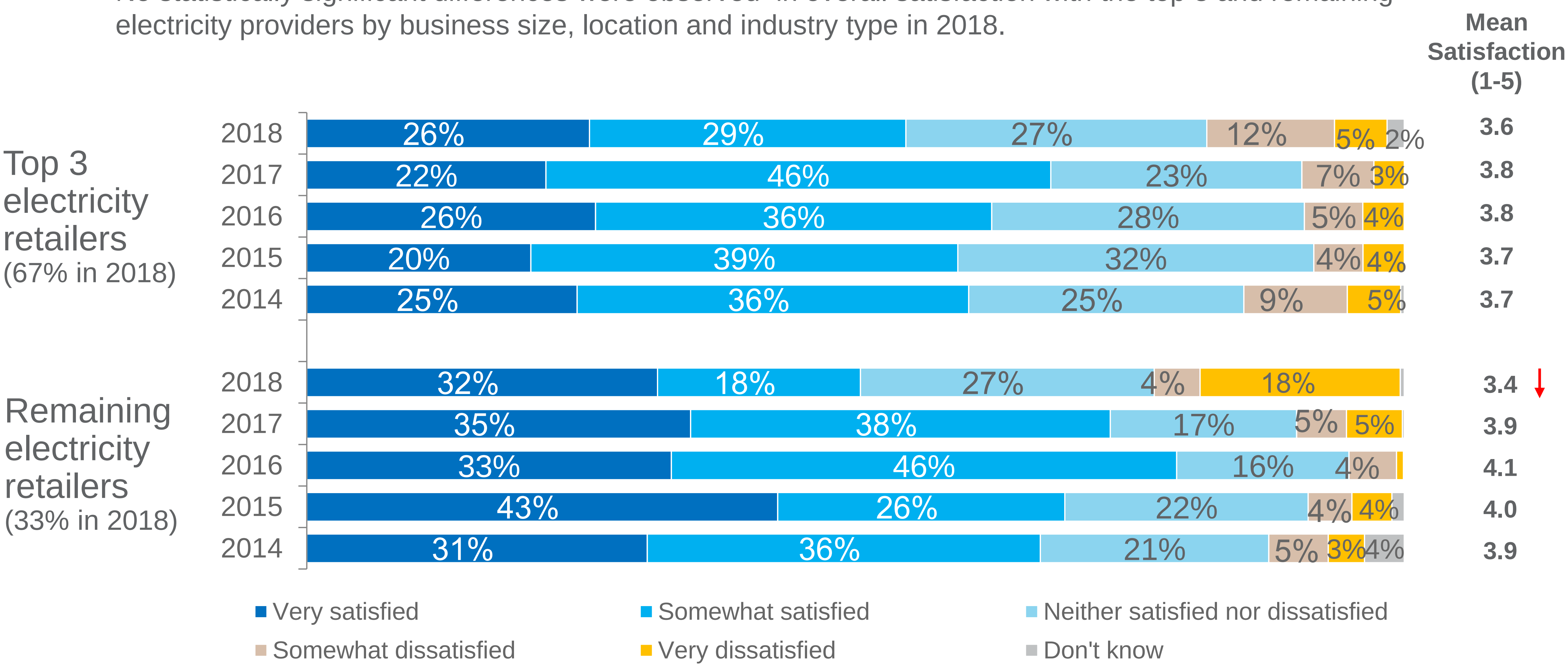
- Average satisfaction with gas providers has broadly remained stable in 2018 and is in line with levels observed in 2017 and previous years.
- No statistically significant differences were observed in overall satisfaction with electricity provider by business size, location and industry type in 2018.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Q7. Overall, How satisfied are you with your business's current gas company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied' .
Base: ECGM participants in 2014 (n=123); 2015 (n=124); 2016 (n=106); 2017 (n=166); 2018 (n=60)

Overall satisfaction with top 3 electricity retailers vs smaller retailers

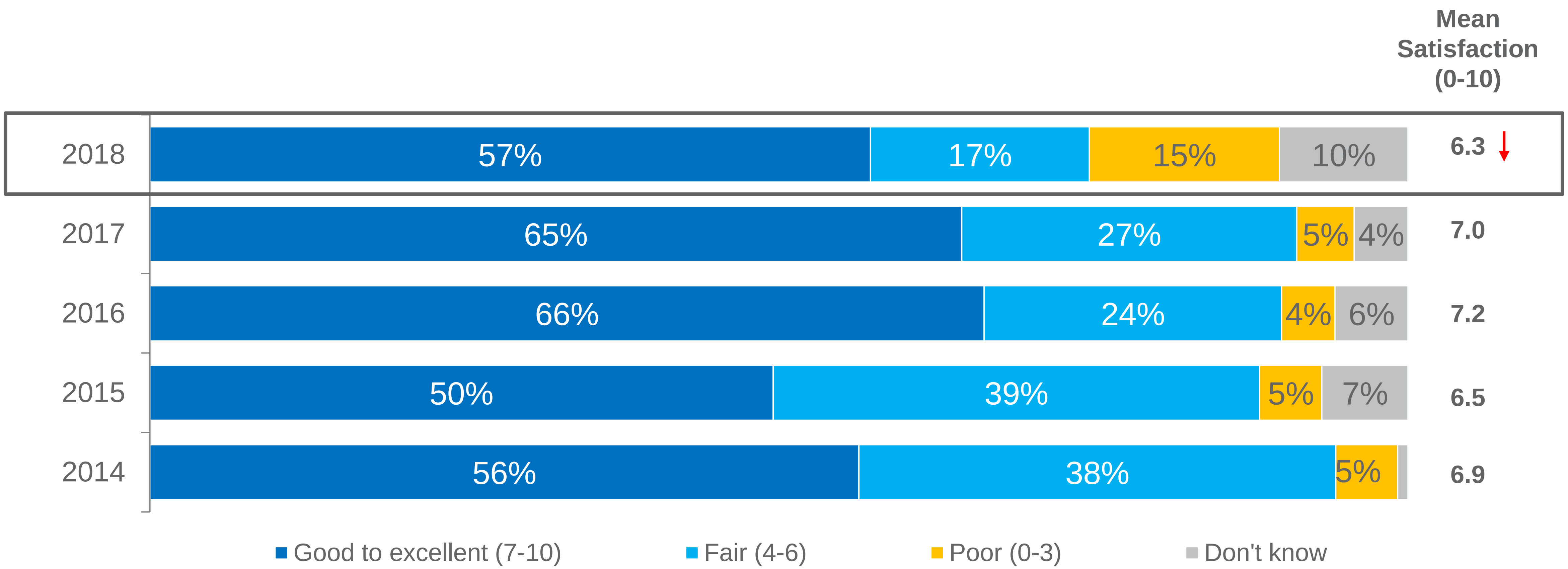
- Average satisfaction with the top 3 retailers reduced slightly in 2018 (down to 3.6 from the 3.8 observed in 2017).
- Average satisfaction with the remaining, smaller retailers has decreased significantly since 2017 (3.9 in 2017 to 3.4 in 2018).
- No statistically significant differences were observed in overall satisfaction with the top 3 and remaining electricity providers by business size, location and industry type in 2018.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: Top 3 electricity retailers: 2014 (n=250); 2015 (n=291); 2016 (n=291); 2017 (n=284); 2018 (n=203). Remaining electricity retailers: 2014 (n=116); 2015 (n=159); 2016 (n=161); 2017 (n=166); 2018 (n=124).

Satisfaction with customer service among electricity providers

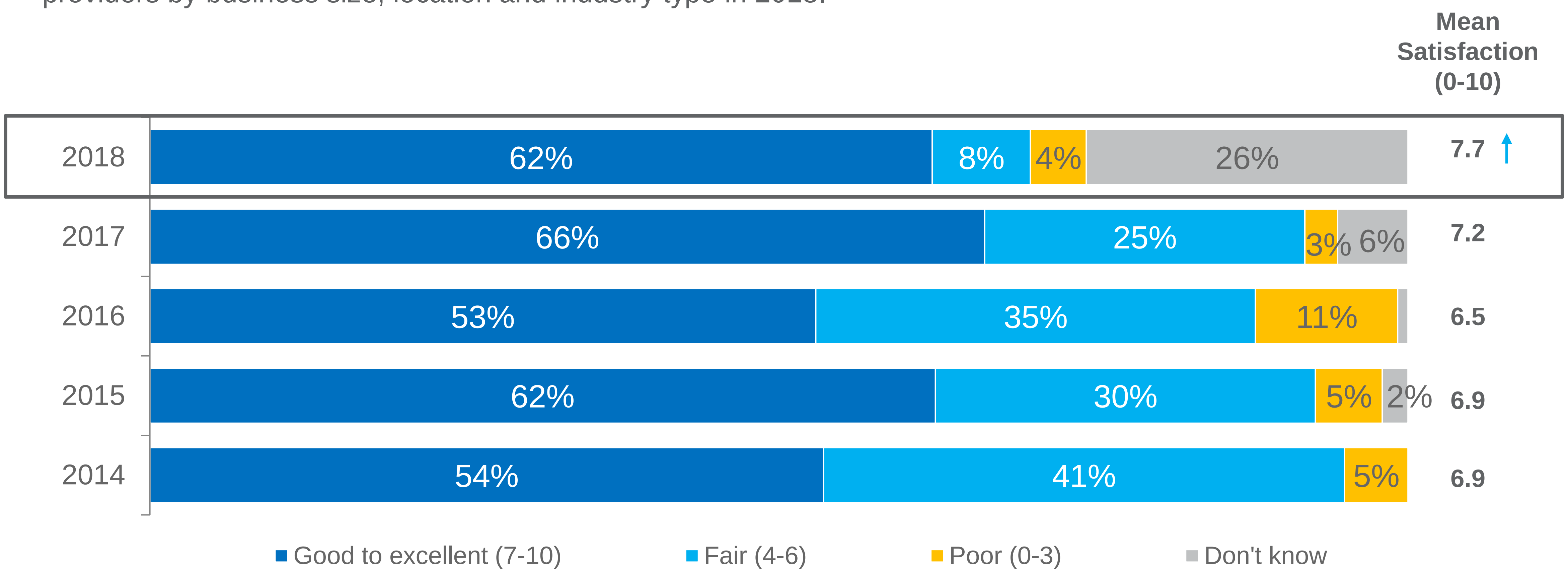
- Average satisfaction with customer service has significantly declined since 2017 (7.0 in 2017 to 6.3 in 2018) to levels last observed in 2015 (6.5).
- No statistically significant differences were observed in satisfaction with customer service by business size, location and industry type in 2018.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Satisfaction with customer service among gas providers

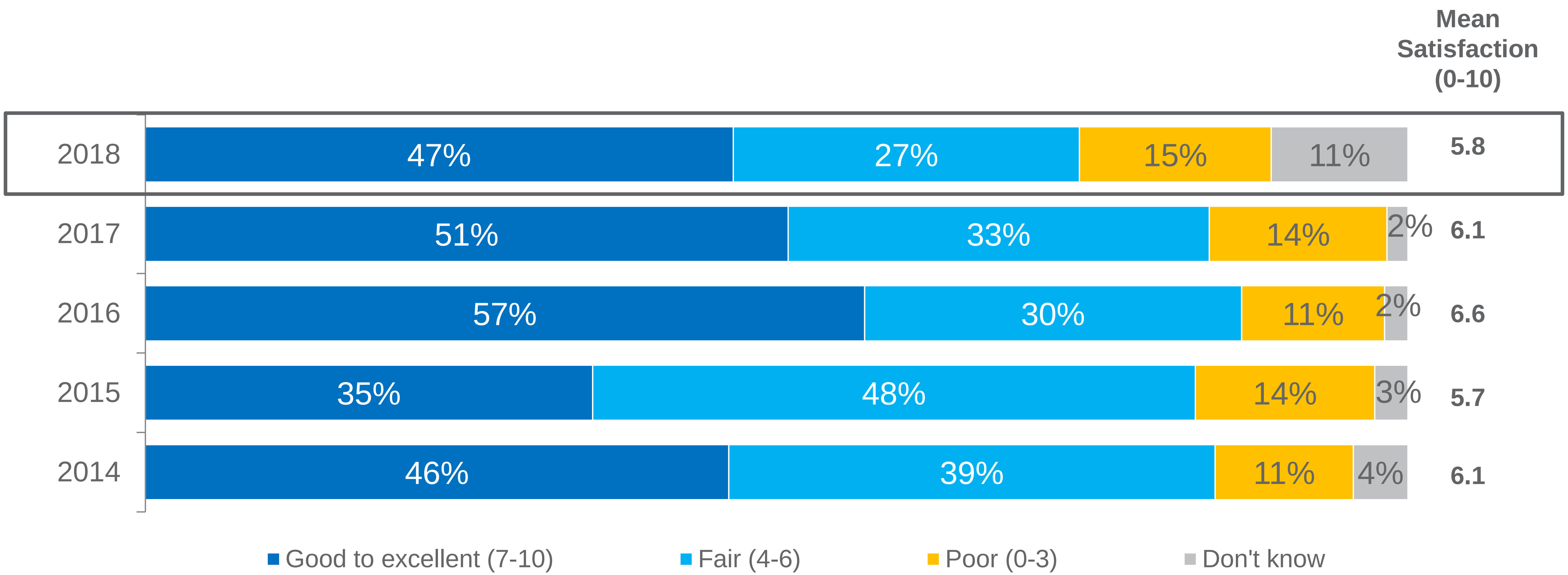
- Average satisfaction with the customer service provided by gas providers was observed to increase in 2018, albeit of a small base of those with mains gas connection.
- There was rise in the proportion who said ‘don’t know’ in response to this question – potentially because these businesses did not have cause to interact with customer service representatives of their gas provider recently.
- No statistically significant differences were observed in satisfaction with customer service among gas providers by business size, location and industry type in 2018.



Q3: How would you rate the overall quality of customer service provided by your business’s [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Q8. How would you rate the overall quality of customer service provided by your business’s gas company? Please use a scale where 0 means very poor and 10 is excellent.
Base: ECGM participants 2014 (n=123); 2015 (n=124); 2016 (n=106); 2017 (n=166); 2018 (n=60)

Value for money among electricity providers

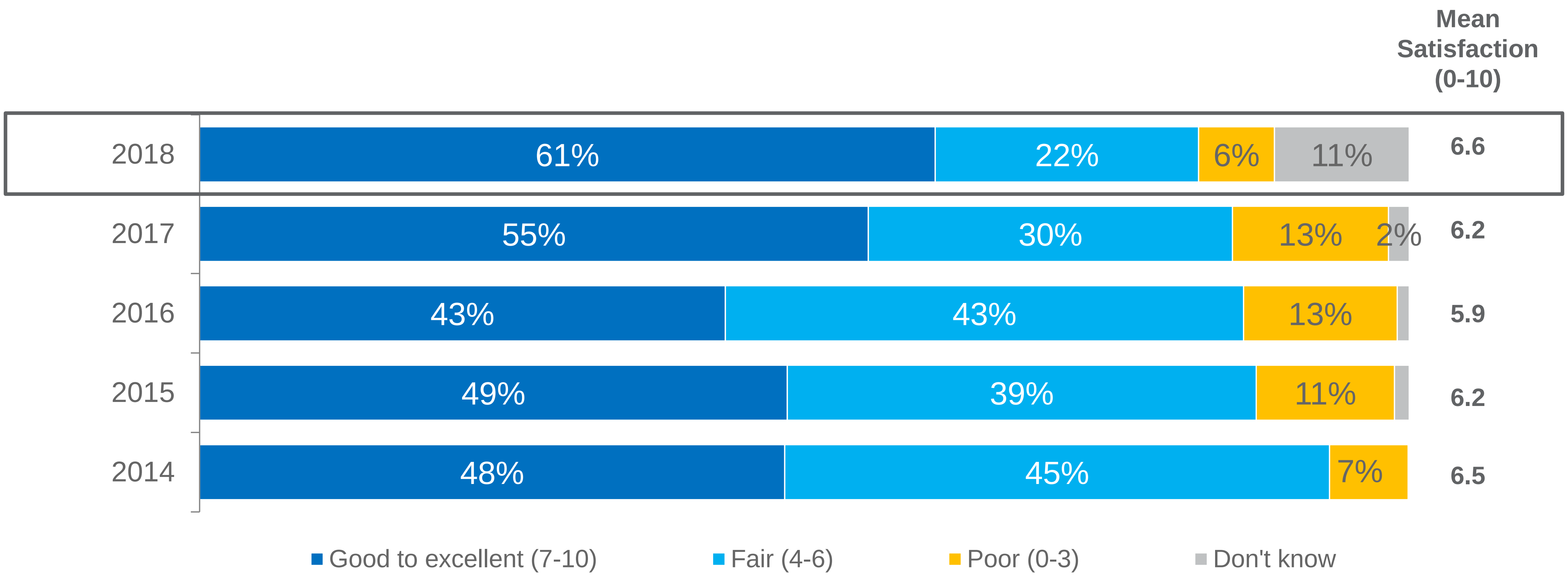
- While perceptions of value for money have declined slightly in 2018, mean satisfaction is broadly in line with levels observed in previous waves (i.e. there has been no statistically significant decrease).
- Of interest, more than one in 10 businesses indicated they didn't know how to rate value for money in 2018.
- No statistically significant differences were observed in satisfaction with customer service among electricity providers by business size, location and industry type in 2018.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Value for money among gas providers

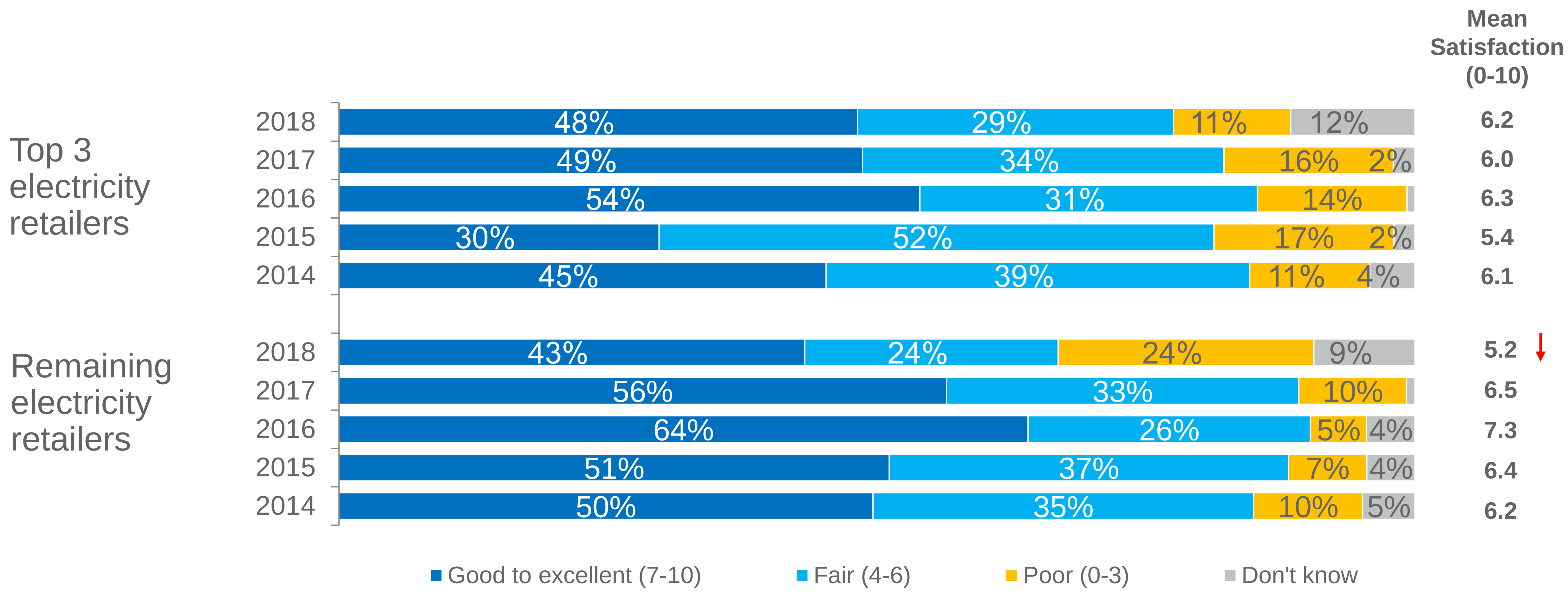
- While perceptions of value for money have increased slightly in 2018, mean satisfaction is not significantly different to levels observed in 2017.
- No statistically significant differences were observed in value for money among gas providers by business size, location and industry type in 2018.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Q9. Using the same scale, how would you rate the overall value for money of the products and services provided by your business's gas company?
Base: ECGM participants: 2014 (n=123); 2015 (n=124); 2016 (n=106); 2017 (n=166); 2018 (n=60)

Value for money - top 3 electricity retailers vs smaller retailers

- Average satisfaction with the top 3 retailers remains broadly unchanged since 2017, while average satisfaction with the remaining, smaller retailers has decreased significantly since 2017 (6.5 in 2017 to 5.2 in 2018).
- No statistically significant differences were observed in overall satisfaction with the top 3 and remaining electricity providers by business size, location and industry type in 2018.



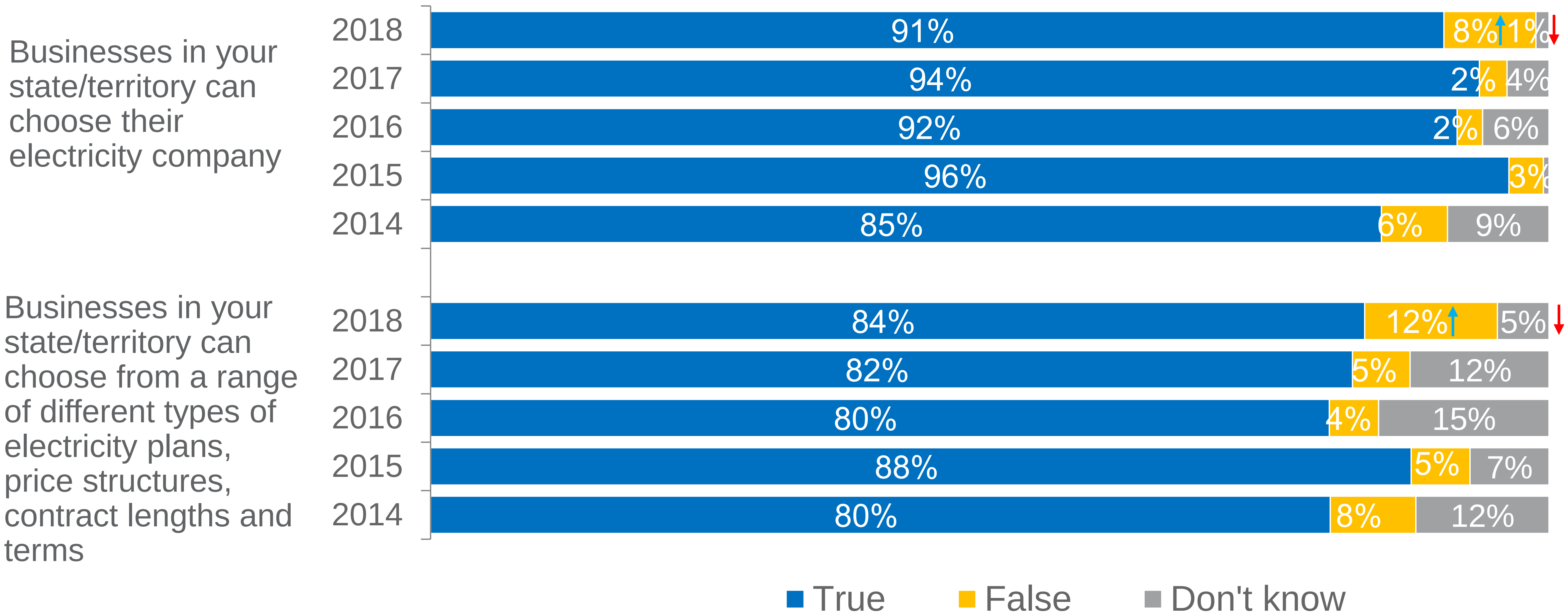
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: NEM participants with top 3 electricity retailers: 2014 (n=250); 2015 (n=291); 2016 (n=291); 2017 (n=284); 2018 (n=203). NEM participants with remaining electricity retailers: 2014 (n=116); 2015 (n=159); 2016 (n=161); 2017 (n=166); 2018 (n=124).

State of competition in the NEM and ECGM

Perceptions of choice

Perceptions of choice – electricity market

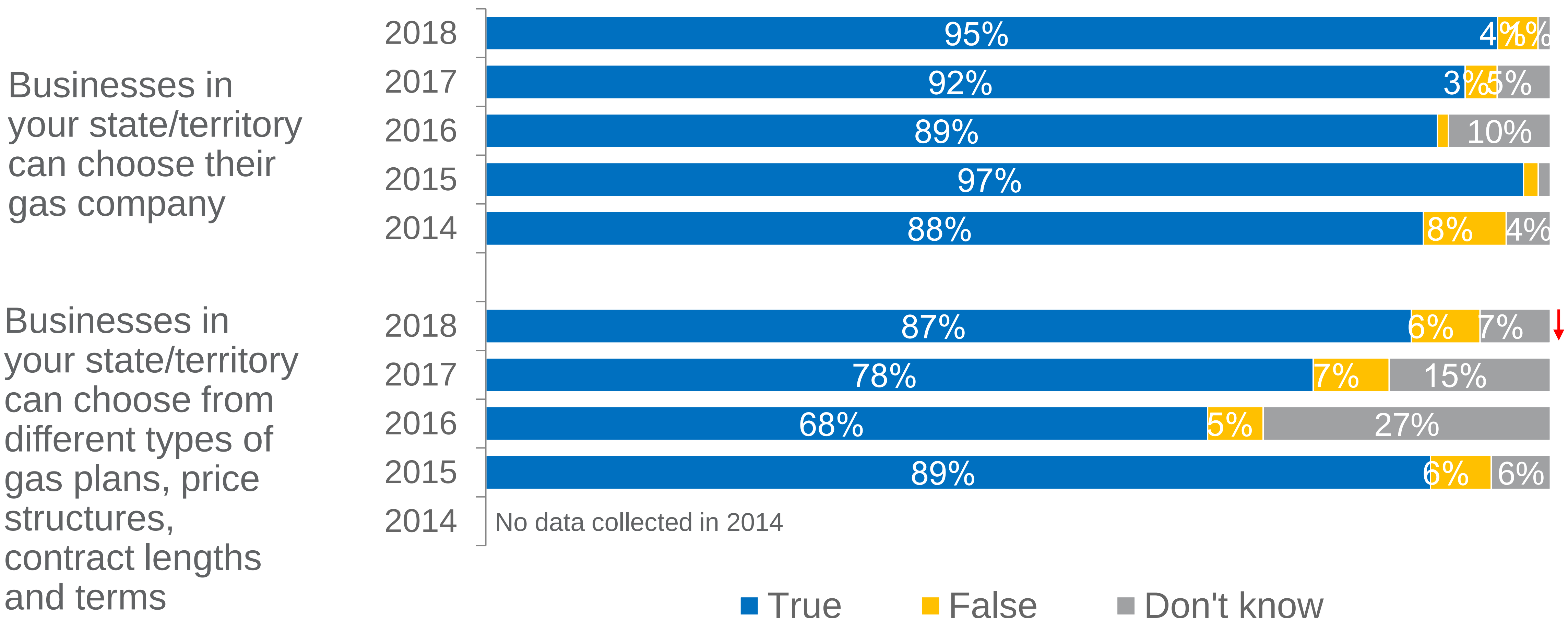
- Awareness of choice appears to be relatively strong overall across the NEM jurisdictions.
- However, there has been a significant increase in the proportion of businesses indicating a lack of choice in electricity companies and/or plans since 2017 which warrants consideration.
- Businesses in metro areas, Victoria, NSW, SA, and South East QLD are significantly more likely than average to feel that businesses can choose their electricity company and select from a range of plans.
- Businesses in regional areas, those in Rest of Queensland (outside of South East QLD) and in Tasmania are significantly less likely than average to feel that businesses can choose their electricity company.



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327).

Perceptions of choice – gas market

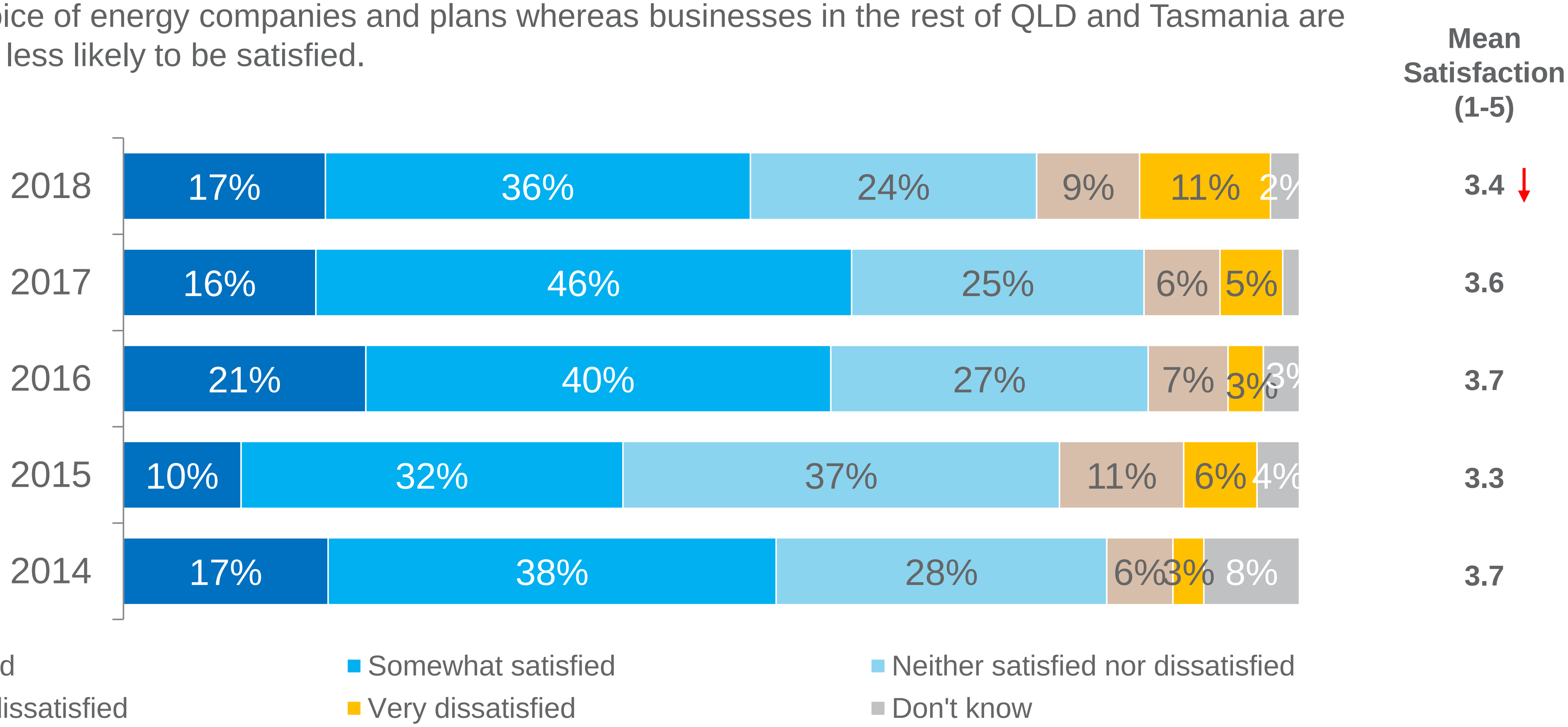
- Off a smaller base of gas users obtained in the 2018 study, knowledge of choice of gas companies and plans also appears to be strong overall.
- No statistically significant differences were observed in knowledge of choice in the gas market by business size, location and industry type in 2018.



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: ECGM participants with gas: 2014 (n=97); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60).

Satisfaction with choice of energy companies and plans

- Average satisfaction with choice of energy companies has significantly declined since 2017 (3.6 in 2017 to 3.4 in 2018).
- This wave saw the highest ever proportion of strong dissatisfaction ('very dissatisfied') with choice of energy companies and plans (11% in 2018, up from 5% in 2017).
- Businesses who were dissatisfied with their choice of energy companies were significantly more likely to believe that they could **not** choose their electricity company (33%) or gas company (42%), compared to those who were satisfied (98% for choosing electricity company, 100% for choosing gas company).
- Businesses in Victoria, NSW and South East QLD are significantly more likely than average to be satisfied with the choice of energy companies and plans whereas businesses in the rest of QLD and Tasmania are significantly less likely to be satisfied.



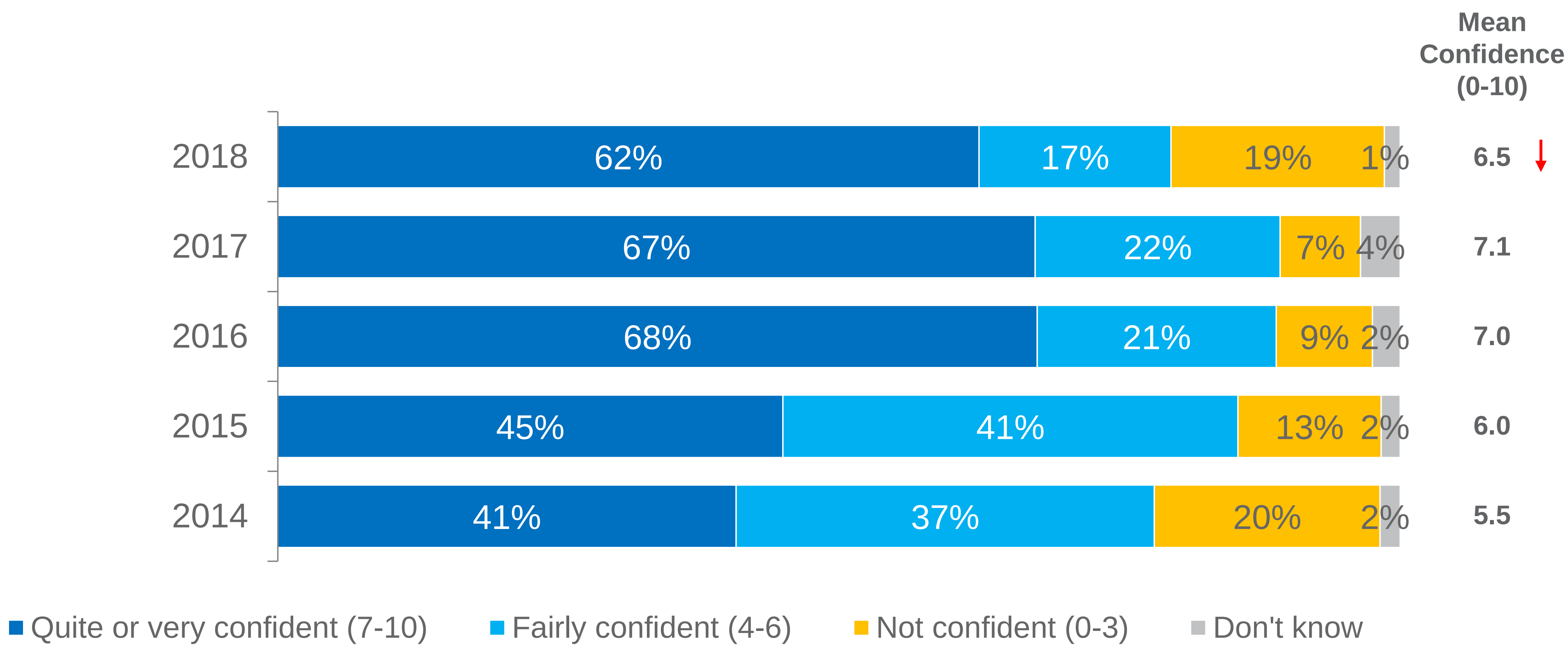
Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327).

colmar brunton.

Information provision

Confidence in finding the right information to help choose energy plan

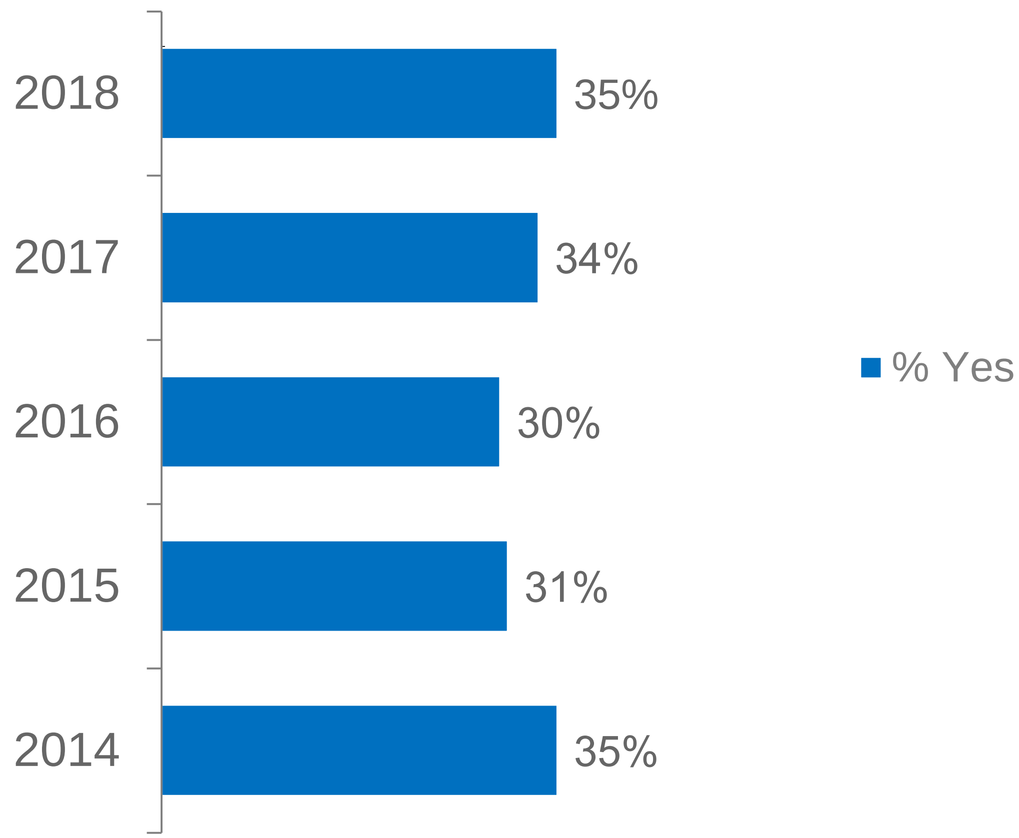
- Average self-rated confidence in finding the right information to help choose a suitable energy plan has significantly declined since 2017 (7.1 in 2017 to 6.5 in 2018).
- Confidence in finding the right information is significantly higher among metro businesses and significantly lower in QLD (excluding South East QLD) and in non-metropolitan areas.



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327).

Actively investigated different energy offers or options in past 12 months

- Just over a third of businesses (35%) report having actively investigated different energy offers or options, broadly in line with proportions observed in 2017 and previous iterations of the study.
- Businesses in Tasmania were significantly less likely to have actively investigated different energy offers or options in the past 12 months.



Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Actively investigating by switching intentions

- Further analysis was conducted to examine how a propensity to actively investigate energy offers differed among those with different switching intentions. Unsurprisingly, those who state they are currently looking for a better deal or have recently switched are more likely to have actively investigated energy offers in the past 12 months. For example:
  - among small businesses who are currently looking for a better deal (n=30), 65% had actively investigated energy offers;
  - among small businesses who would be interested in switching but are not currently looking (n=149), 35% had actively investigated offers;
  - among small businesses who had recently switched (n=55), 62% had actively investigated energy offers;
  - among those who are not interested in switching providers (n=75), only 16% had actively investigated offers; and
  - among small businesses who did not know they had any other options (n=16), only 2% had actively investigated energy offers.

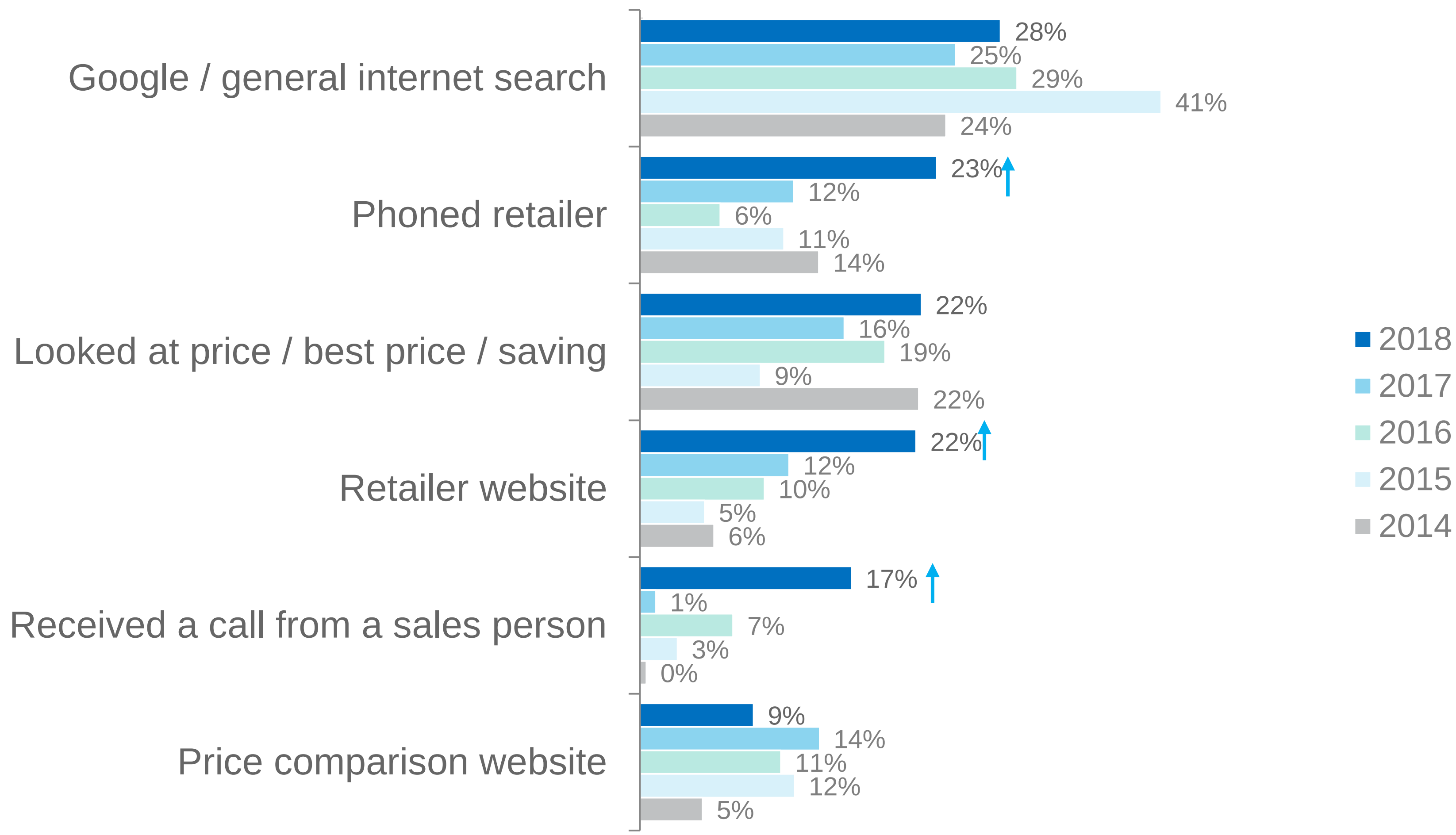
% Actively investigated by switching intentions (2018)

We are currently looking for a better deal (n=30)	We would be interested in switching to a better deal but are not currently looking (n=149)	We recently switched our business energy provider or plan and so probably won't look for a better deal for a while (n=55)	We are not interested in switching our energy provider or plan (n=75)	We have no other options available here / only one provider (n=16)
65%	35%	62%	16%	2%

Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?

Information sources used for investigation in last 12 months (among those who switched)

- While ‘Google/internet searching’ remained the most common information sources to investigate switching options among business operators who had switched in the last 12 months, in 2018 there were significant increases for ‘phoning a retailer’, ‘retailer websites’ and ‘receiving a call from a salesperson’.
- No statistically significant differences have been observed in information sources by business size, location and industry type in 2018.



Q23. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?

Base: NEM participants who have switched anything in the last 5 years: 2014 (n=191); 2015 (n=236); 2016 (n=201); 2017 (n=259); 2018 (n=210).

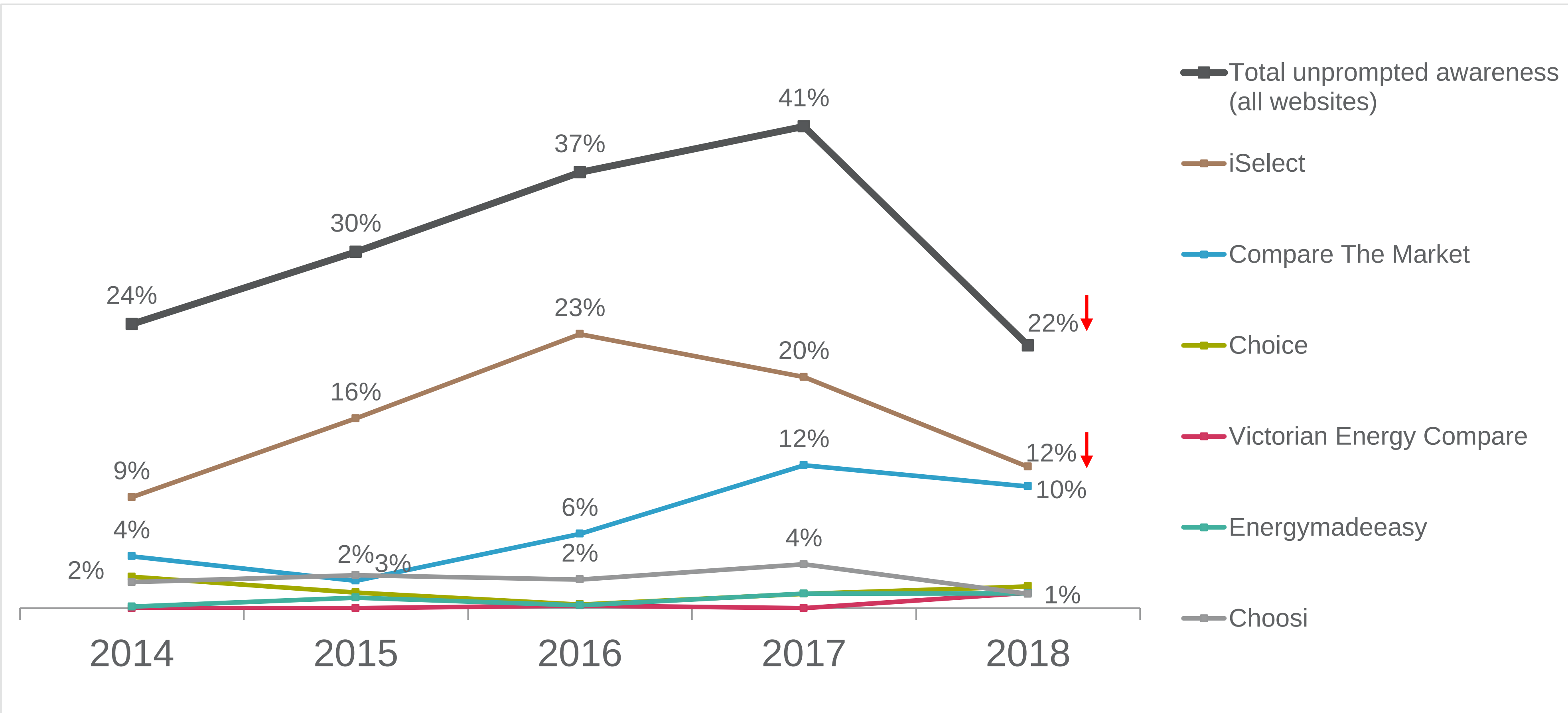
Information sources used for investigation in last 12 months (investigated but not switched)

- The information sources used by businesses who had investigated options but had not ended up switching were similar to those who had investigated and subsequently switched.
- ‘Google/internet searching’ was the most common information sources used to investigate switching options
- In 2018 there was a significant increase in ‘receiving a call from a salesperson’ (23%, up from 1% in 2017).
- No statistically significant differences were observed in information sources by business size, location and industry type in 2018.

Q23. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?
Base: NEM participants who have not switched but investigated options in the last 12 months: 2017 (n=68); 2018 (n=20).
*Note: this question was a “please specify” question.

Unprompted awareness of comparison websites or services

- There was a significant decline in the proportion of business operators able to identify any comparison websites or services in 2018 vs. the 2017 result (22%, down from 41% in 2017).
- Tasmanian businesses were significantly less likely than average to be aware of any comparison website or service.

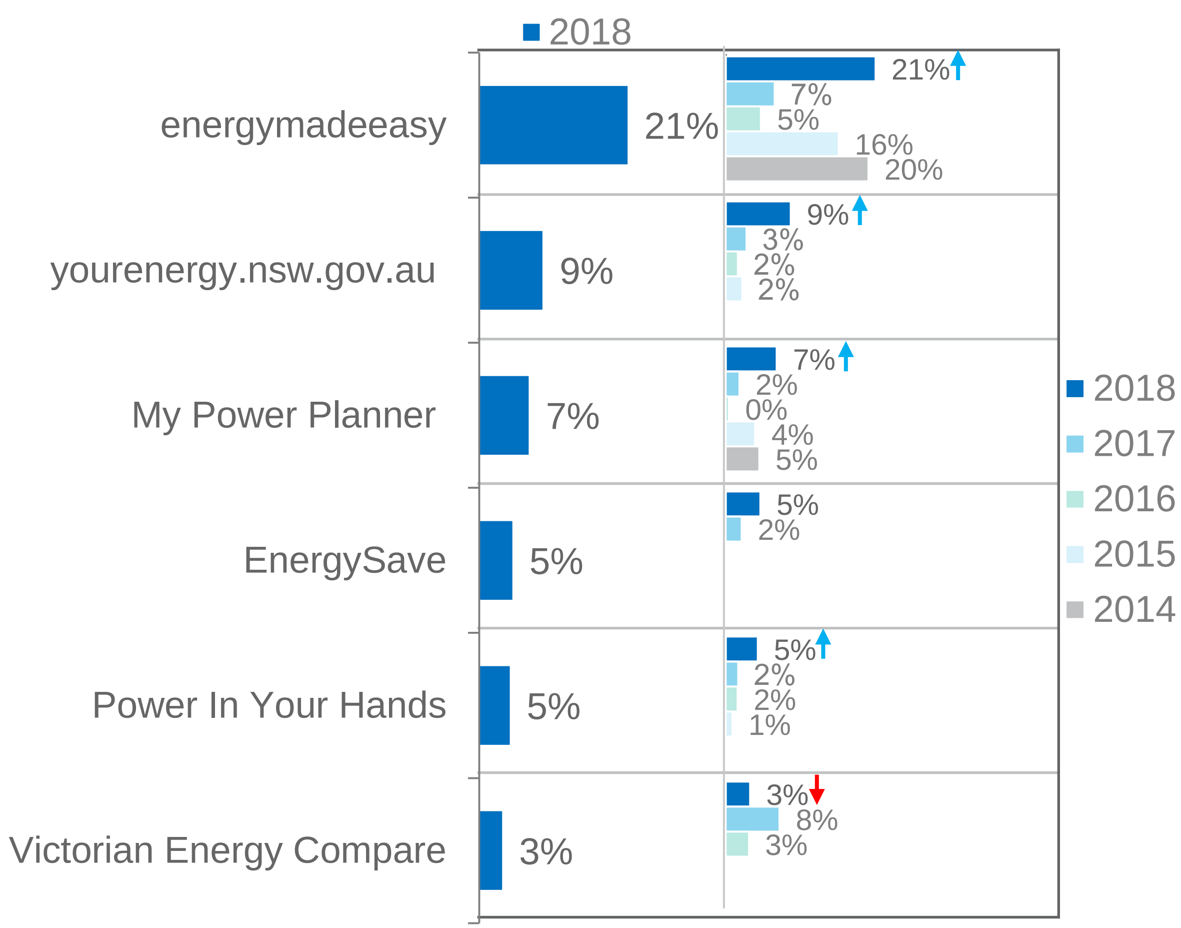


Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their business? Any others?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327).

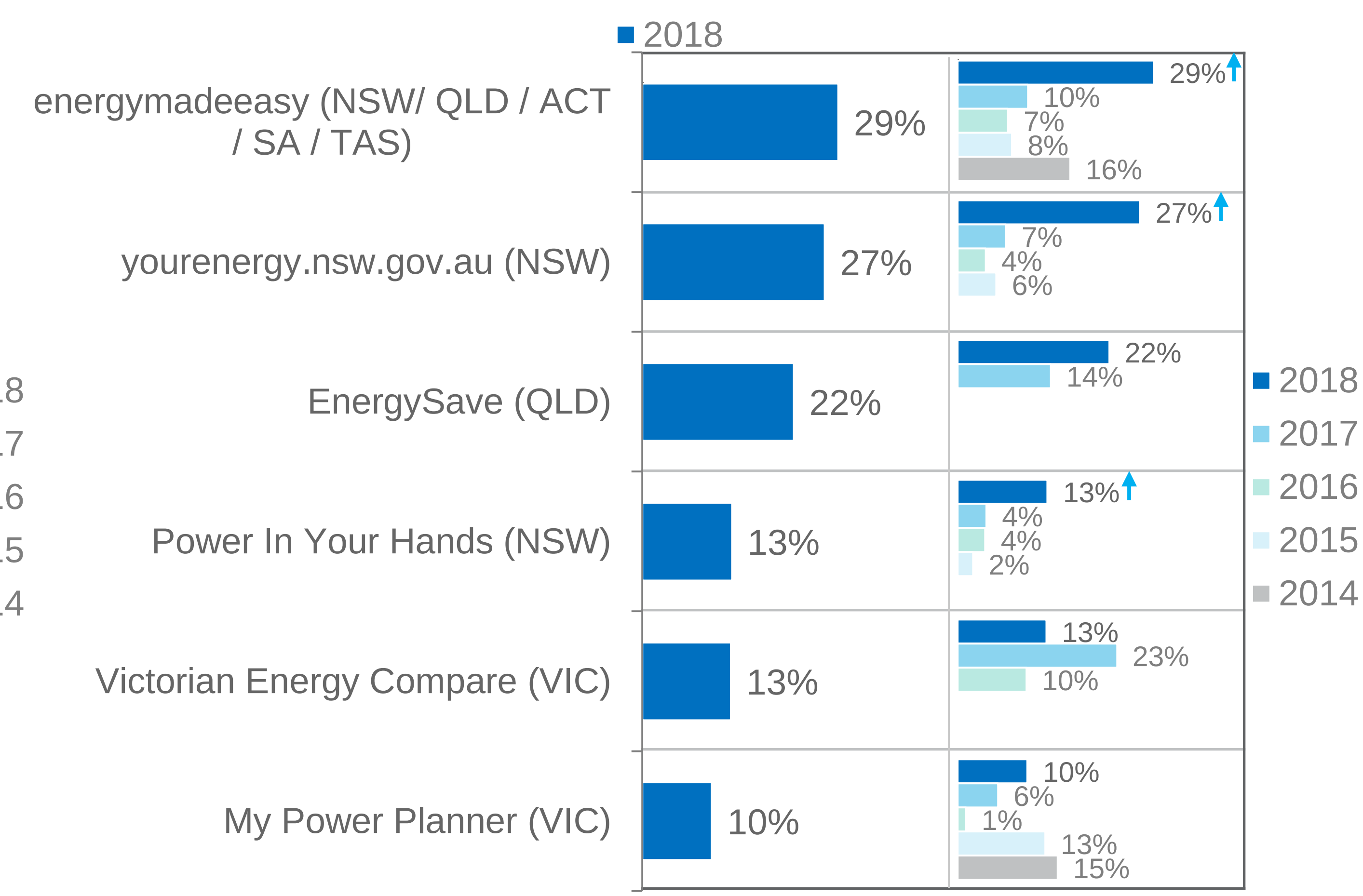
Awareness of government comparison websites or campaigns

- While unprompted awareness declined, total awareness (including both unprompted and prompted awareness) actually increased for many of the key sites including energymadeeasy, yourenergy and My Power Planner.

Total (Prompted + unprompted) awareness across NEM



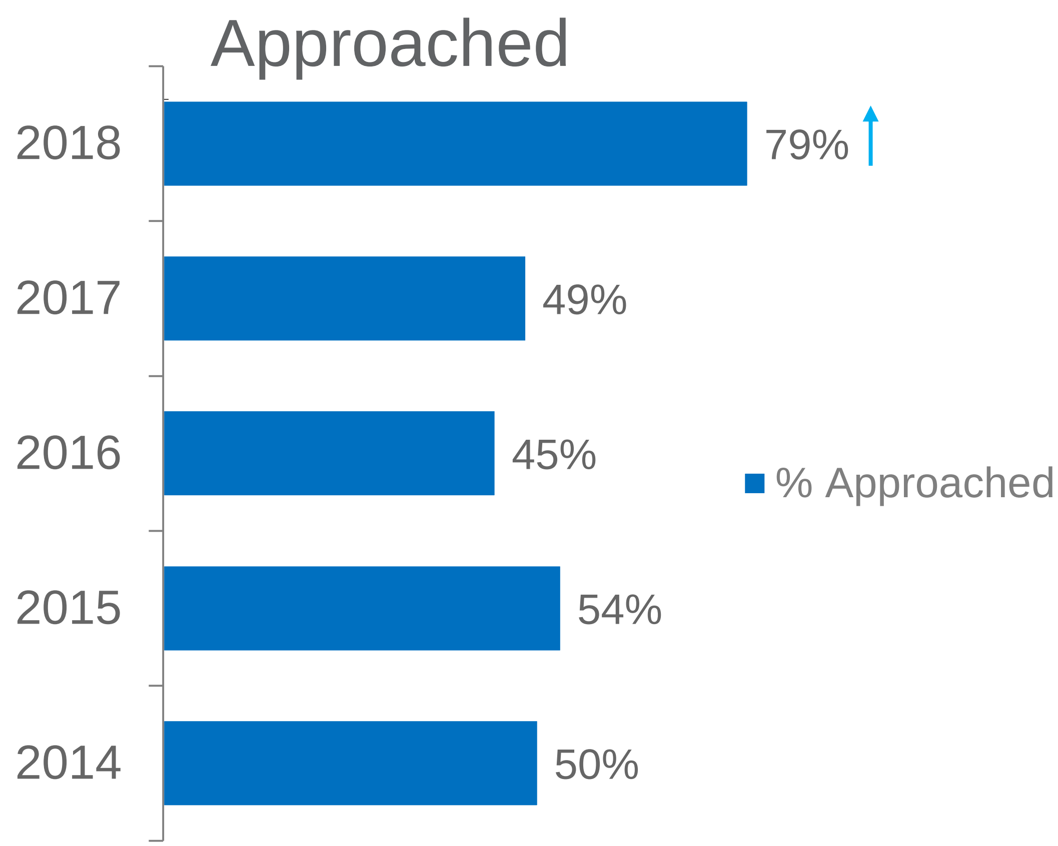
Total (Prompted + unprompted) awareness within specific region/s

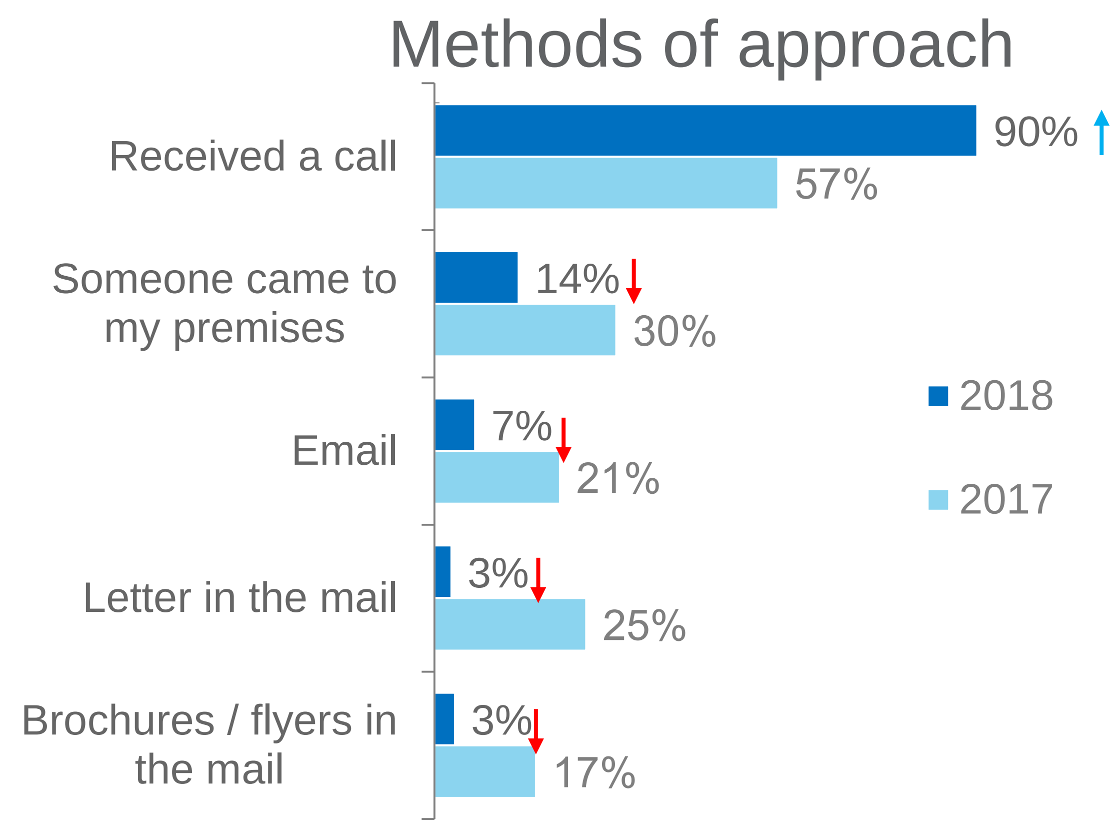


Awareness of energy retailer comparison websites (combination of Q38, 39, 40, 63, 82).
Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Approached by alternative energy retailer in past 12 months

- There was a significant increase in the number of business operators who reported being approached by an alternate energy company in the past 12 months (79%, up from 49% in 2017).
- There was also a change observed in the channel trough which businesses reported being contacted, with phone being the most dominant channel through which businesses were approached in 2018.
- Businesses in Victoria, NSW and South East QLD were significantly more likely than average to have been approached by an alternative energy retailer in the past 12 months, whereas businesses in the ACT, Rest of QLD and Tasmania were significantly less likely to have been approached.



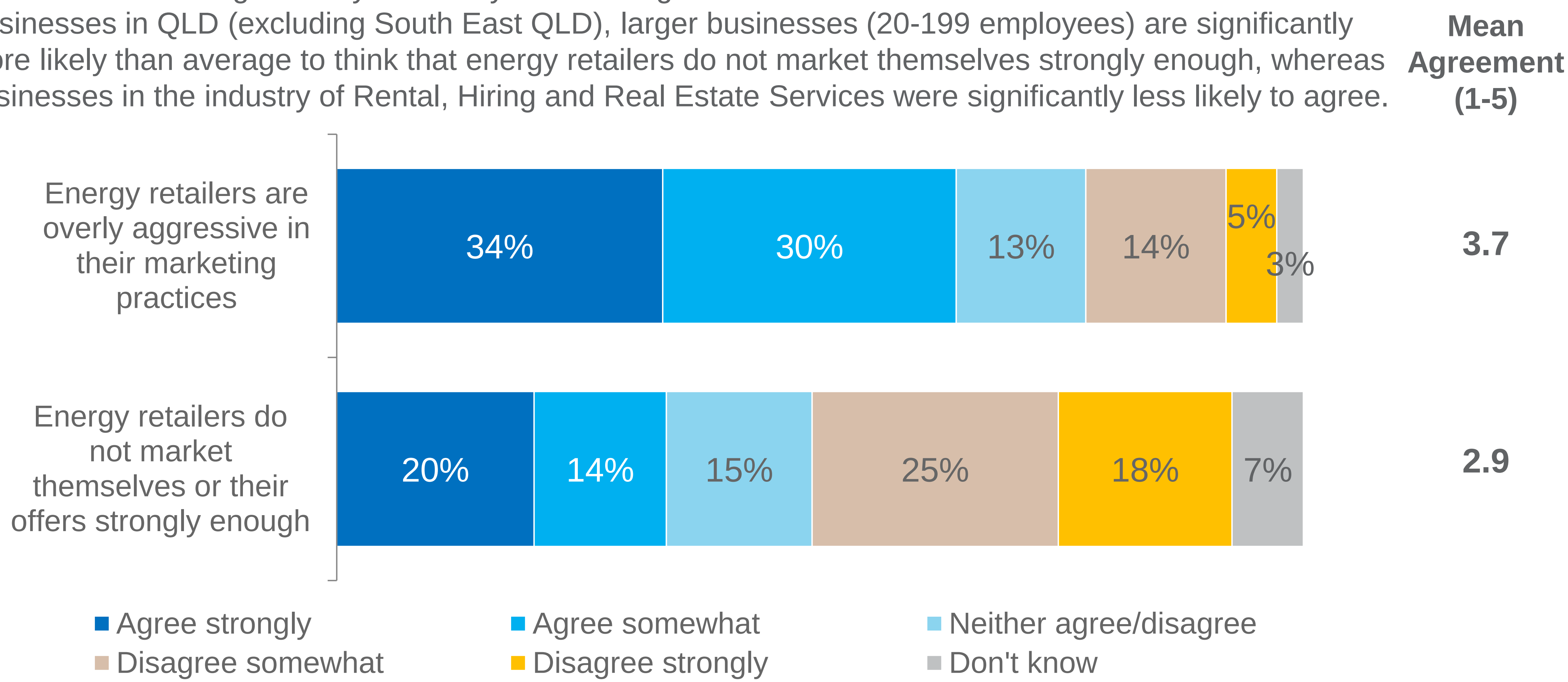


Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327).

Q18B. In what ways was your business approached by an energy company?
Base: NEM participants that were approached by an energy company: 2017 (n=211); 2018 (n=221)

Marketing and information from energy retailers (new question in 2018)

- To explore how aggressive businesses operators feel energy retailers are in their marketing efforts, two new questions were added in the 2018 study.
- On balance, the results suggest most businesses view such efforts more towards the “too aggressive” end of the spectrum as opposed to “not marketing themselves strongly enough”.
- Businesses in Victoria are significantly more likely than average to think that energy retailers are overly aggressive in their marketing practices, whereas businesses in the ACT, QLD (excluding South East QLD) and Tasmania are significantly less likely than average to think so.
- Businesses in QLD (excluding South East QLD), larger businesses (20-199 employees) are significantly more likely than average to think that energy retailers do not market themselves strongly enough, whereas businesses in the industry of Rental, Hiring and Real Estate Services were significantly less likely to agree.

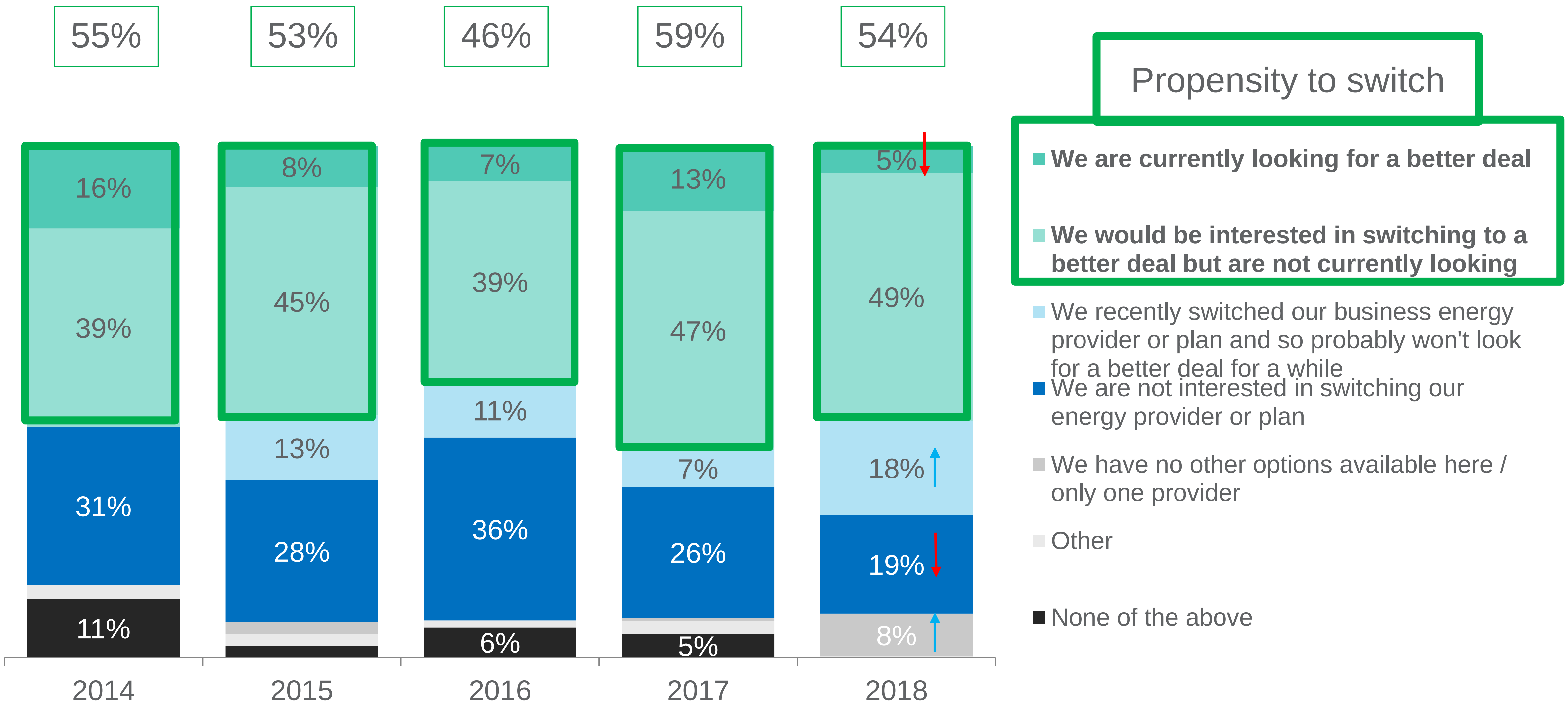


Q18C. Generally speaking, to what extent do you agree or disagree with each of the following statements in relation to marketing and information from energy retailers?
Base: All NEM participants: 2018 (n=327).

Switching behaviours and outcomes

Intentions to switch in the future

- Just over half of all businesses indicated a propensity to switch energy providers in 2018 – down from 59% in 2017 but in line with levels observed in previous years.
- There was a significant increase in the proportion of businesses reporting having recently switched so not actively looking to switch (18%, up from 7% in 2017), and a corresponding decrease in the proportion indicating they are not interested in switching either provider or plan (19%, down from 26% in 2017).



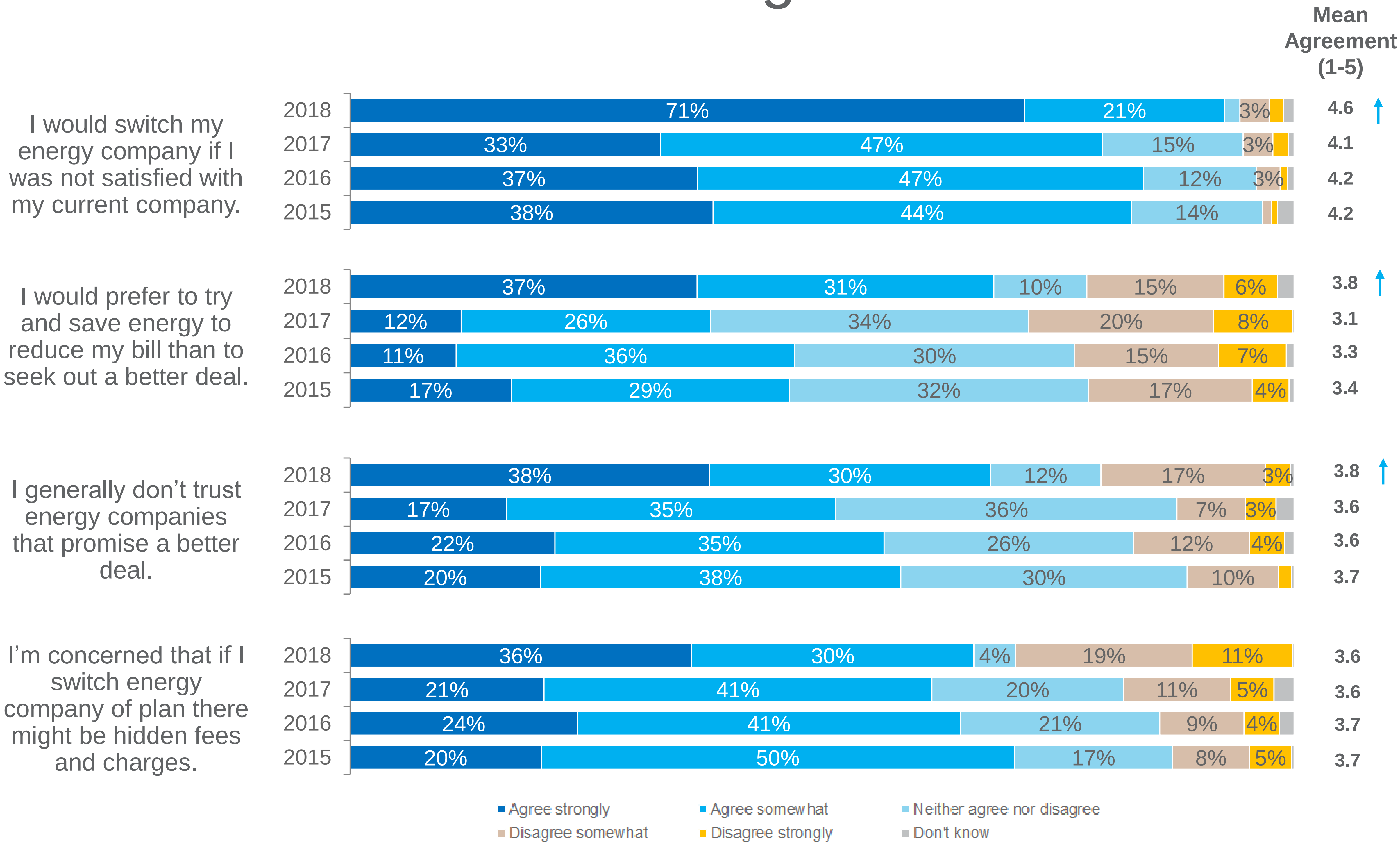
Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Attitudes towards switching summary

- As in previous waves of the study, business operators were asked a range of questions to explore their attitudes towards switching.
- Of note, there was a significant increase in agreement with the statement “I would switch my energy company if I was not satisfied with my current company” (up to an average of 4.6 on a 1 to 5 scale, up from 4.1 in 2017), suggesting most businesses feel a high degree of agency to move if dissatisfaction with their energy provider is an issue.
- If a degree of dissatisfaction is not present, the 2018 data suggests switching is less likely due to a combination of:

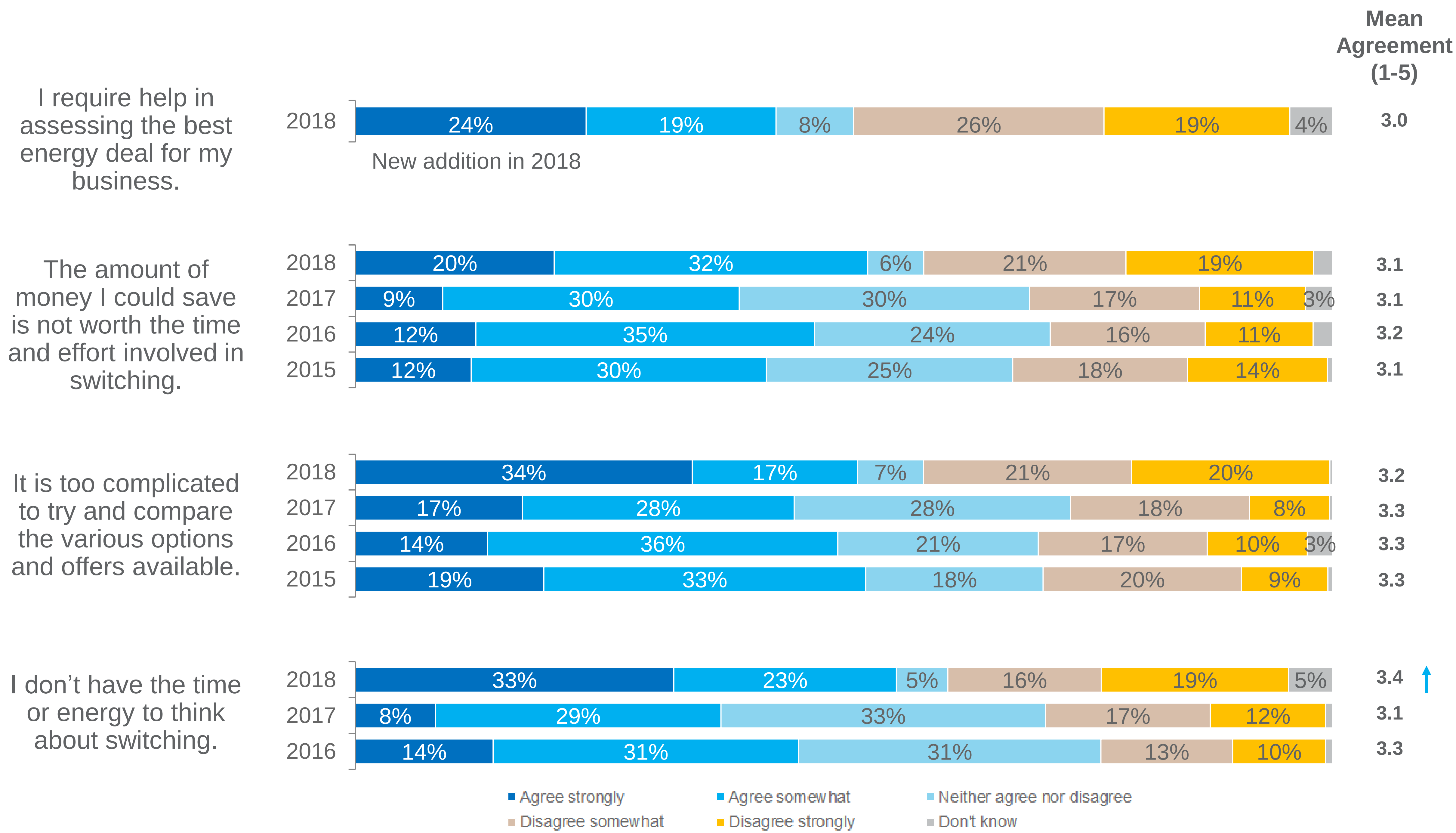
  - A lack of time or energy to find a better deal (3.4, up from 3.1 in 2017)
  - A preference to reduce cost through reducing energy consumption (3.8, up from 3.1 in 2017)
  - A lack of trust in providers promising a better deal (3.8, up from 3.6 in 2017)
- In terms of statistically significant differences in attitudes by business size, location and industry, the following were observed.
  - Tasmanian businesses are significantly less likely than average to trust energy companies that promise a better deal. They were also significantly less likely to indicate that it is too complicated to compare various energy offers.
  - Victorian businesses are significantly more likely than average to indicate they would switch energy companies if they were not satisfied. Tasmanian business are significantly less likely than average to switch energy companies if they were not satisfied.
  - Businesses in the ‘Rental, Hiring and Real Estate Services’ industry are significantly more likely than average to indicate they would prefer to try and save energy than seek out a better deal.

Attitudes towards switching



Q59. Do you agree or disagree with the following statements?
Base: NEM participants in 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Attitudes towards switching



Q59. Do you agree or disagree with the following statements?
Base: NEM participants in 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)

Switching behaviours

Rates of switching in the last 5 years

- Switching rates (in the past 5 years) have significantly increased in this most recent wave (70% reporting having switched either a provider or plan in the past 5 years, up from 47% in 2017).
- Businesses in the ACT, in metro areas, those in the 'Transport, Postal and Warehousing' industry and larger businesses (20-199 employees) are significantly *less* likely than average to have switched electricity company in the last 5 years, whereas businesses in regional areas and in the manufacturing industry are significantly *more* likely to have switched electricity company in the last 5 years.

	2018	2017	2016	2015	2014
Electricity company	54% ↑	37%	34%	38%	38%
Electricity plan	41% ↑	29%	23%	33%	35%
TOTAL Electricity Company and/or Plan	70% ↑	45%	43%	50%	51%
TOTAL Electricity or Gas Company and/or Plan	70% ↑	47%	44%	51%	53%
Consumers with mains gas	**2018**	**2017**	**2016**	**2015**	**2014**
Gas company	47% ↑	32%	10%	14%	46%
Gas plan	31%	29%	6%	14%	48%
TOTAL Gas Company and/or Plan	48%	43%	15%	18%	61%

Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=325)
ECGM participants : 2014 (n=96); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60).

Rates of switching in the last 5 years by State

- Further analysis of switching rates in the last 5 years was conducted by location (state and territory). For all states in the NEM, there was an increase in switching rates in 2018, compared to the 2017 results, although the increased rates of switching in SA were generally not statistically significant. Analysis of gas switching rates by state was not possible due to the small number of businesses in each state who had piped gas.

	NEM (n=325)	VIC (n=74)	NSW (n=76)	ACT (n=37)	SA (n=69)	SEQ (n=69)
Electricity company	54%, up from 37% ↑	60%, up from 37% ↑	59%, up from 43% ↑	23%, up from 3% ↑	43%, up from 28% ↑	50%, up from 27% ↑
Electricity plan	41%, up from 29% ↑	40%, up from 27% ↑	51%, up from 31% ↑	28%, up from 11% ↑	26%, down from 32%	40%, up from 26%
TOTAL Electricity Company and/or Plan	70%, up from 45% ↑	74%, up from 43% ↑	76%, up from 51% ↑	39%, up from 11% ↑	52%, up from 43%	71%, up from 37% ↑
TOTAL Electricity or Gas Company and/or Plan	70%, up from 47% ↑	74%, up from 47% ↑	76%, up from 53% ↑	39%, up from 11% ↑	53%, up from 44%	71%, up from 39% ↑
Consumers with mains gas	**ECGM (n=60)**	**VIC (n=26)**	**NSW (n=14)**	**ACT (n=4)**	**SA (n=14)**	**SEQ (n=2)**
Gas company	47%, up from 32% ↑	-	-	-	-	-
Gas plan	31%, up from 29% ↑	-	-	-	-	-
TOTAL Gas Company and/or Plan	48%, up from 43% ↑	-	-	-	-	-

Q17. In the past 5 years, how many times has your business changed the following?
Base for 2018 electricity results: All NEM participants in each state.
Base for 2018 gas results: all ECGM participants in each state who have gas.

Rates of switching in the last 12 months

- Switching rates (in the past 12 months) have also significantly increased since 2017.
- No statistically significant differences were observed in rates of switching in the last 12 months by business size, location and industry type in 2018.

	2018	2017	2016	2015	2014
Electricity company	19% ↑	11%	11%	18%	0%
Electricity plan	17% ↑	11%	9%	19%	0%
TOTAL Electricity Company and/or Plan	31% ↑	17%	17%	28%	0%
TOTAL Electricity or Gas Company and/or Plan	32% ↑	20%	18%	28%	0%
Consumers with mains gas	**2018**	**2017**	**2016**	**2015**	**2014**
Gas company	30% ↑	10%	4%	7%	0%
Gas plan	24%	13%	5%	8%	0%
TOTAL Gas Company and/or Plan	33% ↑	19%	8%	9%	0%

Q17. In the past 12 months, how many times has your business changed the following?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=325)
ECGM participants: 2014 (n=123); 2015 (n=124); 2016 (n=106); 2017 (n=166); 2018 (n=60).

Rates of switching in the last 12 months by State

- Further analysis of switching rates in the last 12 months was conducted by location (state and territory). For Victoria and South East Queensland, there were significant increases in switching rates in 2018, compared to the 2017 results. However for South Australia, there was a significant decrease in the proportion of switching of electricity plans. Analysis of gas switching rates by state was not possible due to the small number of businesses in each state who had piped gas.

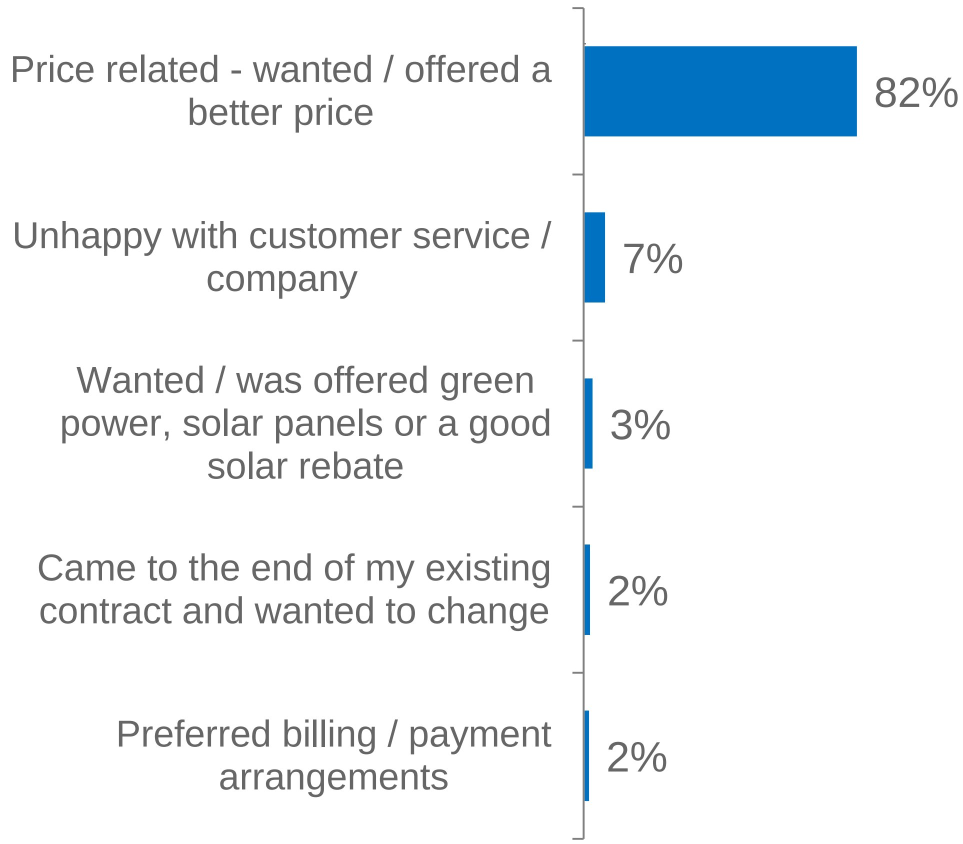
	NEM (n=325)	VIC (n=74)	NSW (n=76)	ACT (n=37)	SA (n=69)	SEQ (n=69)
Electricity company	19%, up from 11% ↑	28%, up from 7% ↑	11%, down from 15%	9%, up from 0%	14%, up from 11%	24%, up from 12% ↑
Electricity plan	17%, up from 11% ↑	16%, up from 6% ↑	19%, up from 12%	5%, down from 8%	5%, down from 16% ↓	24%, up from 15%
TOTAL Electricity Company and/or Plan	31%, up from 17% ↑	34%, up from 10% ↑	28%, up from 20%	12%, up from 8%	19%, down from 22%	45%, up from 20% ↑
TOTAL Electricity or Gas Company and/or Plan	32%, up from 20% ↑	34%, up from 15% ↑	29%, up from 22%	12%, up from 8%	19%, down from 24%	45%, up from 23% ↑
Consumers with mains gas	**ECGM (n=60)**	**VIC (n=26)**	**NSW (n=14)**	**ACT (n=4)**	**SA (n=14)**	**SEQ (n=2)**
Gas company	30%, up from 10% ↑	-	-	-	-	-
Gas plan	24%, up from 13%	-	-	-	-	-
TOTAL Gas Company and/or Plan	33%, up from 19% ↑	-	-	-	-	-

Q17. In the past 12 months, how many times has your business changed the following?
Base for 2018 electricity results: All NEM participants in each state.
Base for 2018 gas results: all ECGM participants in each state who have gas.

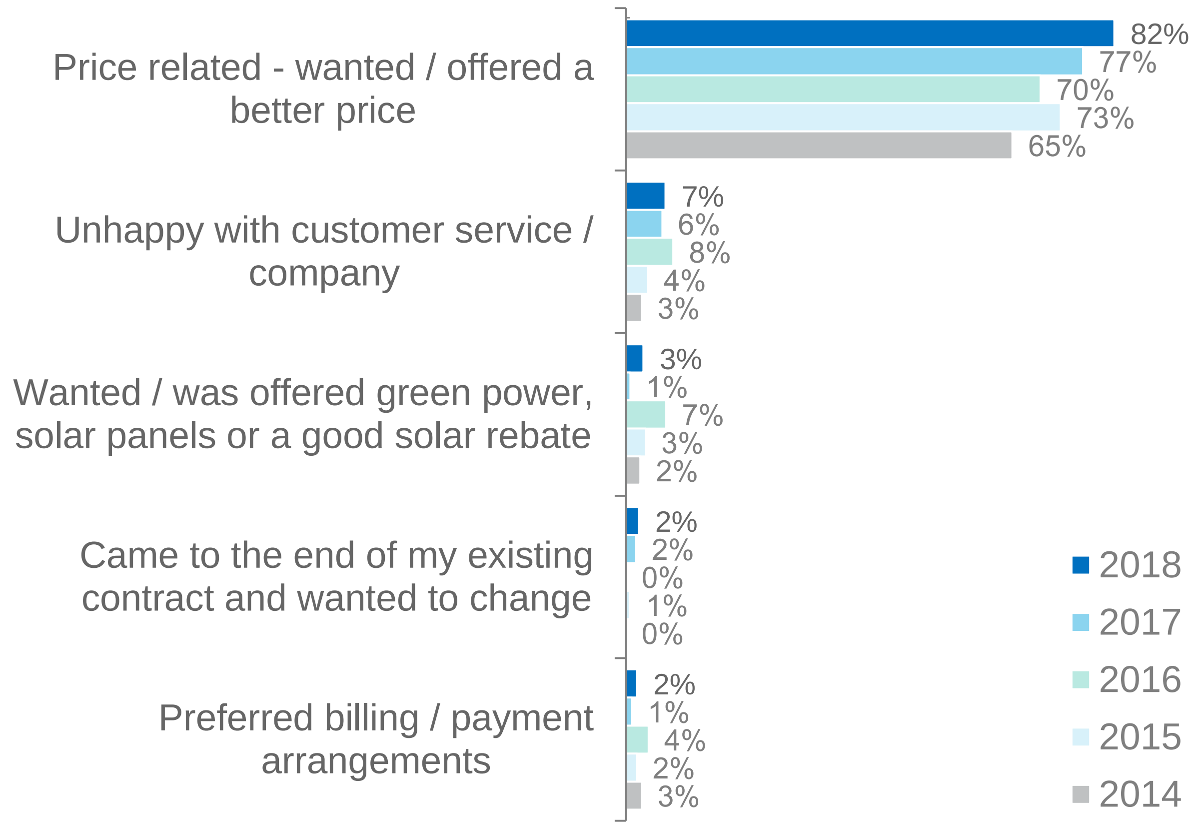
Reasons for switching (unprompted)

- No statistically significant differences have been observed in the top 5 reasons for switching since 2017.
- In line with key reasons for switching observed in previous waves, the desire for a better price was the dominant reason among those who had switched either provider or their plan.

Top 5 reasons for switching in past 5 years



Top 5 reasons for switching over time

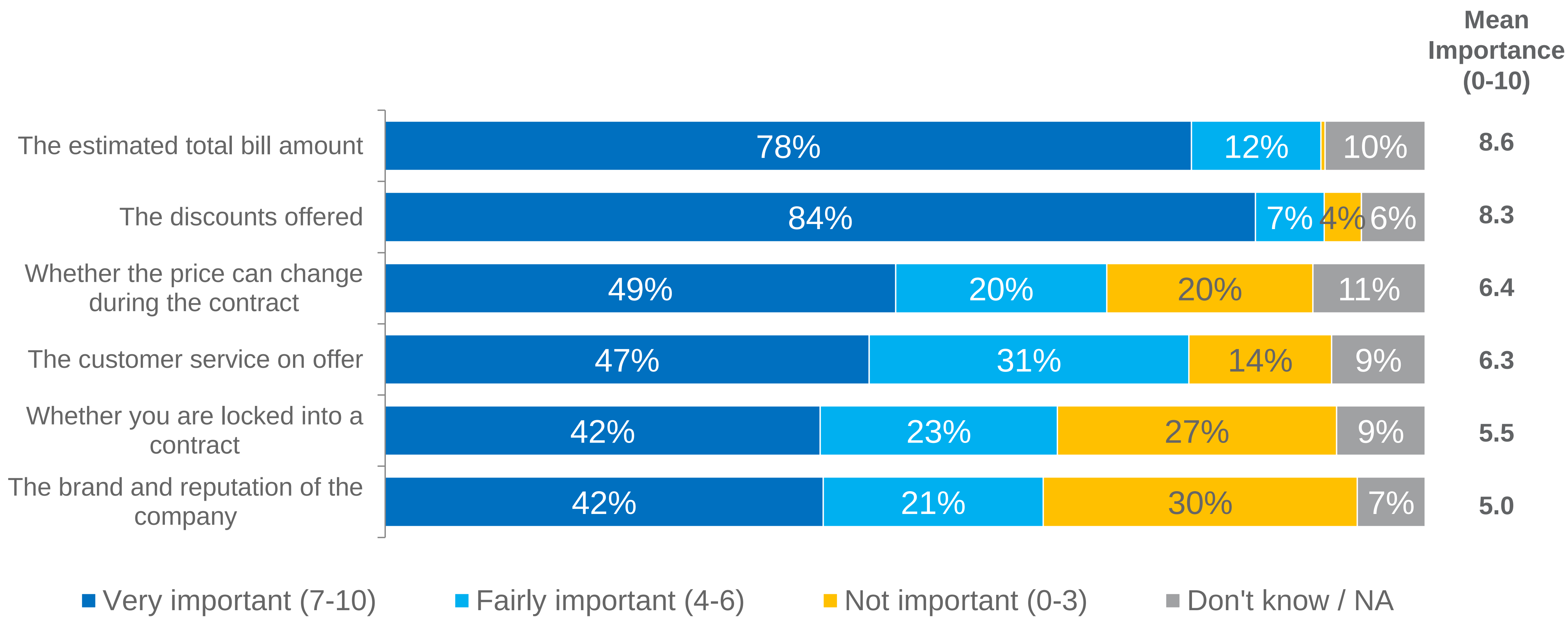


Q22. The last time you switched, what was the main reason you changed your business' energy company, plan or deal? Any other reasons?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years in 2014 (n=191); 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210)

colmar brunton.

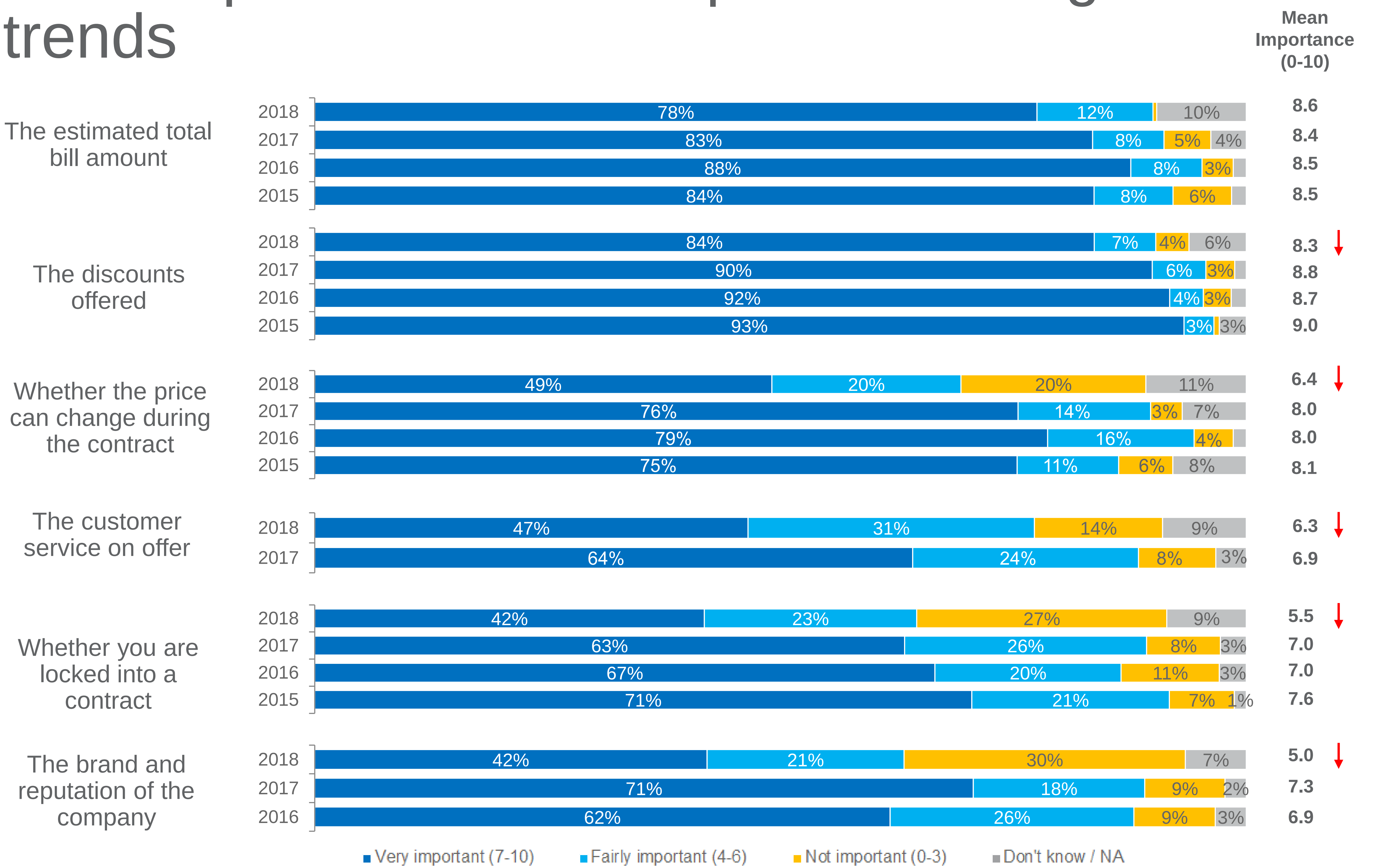
Most important factors in past switching (2018)

- Those that had switched provider or plan were asked to rate the importance of a number of factors in terms of why they switched.
- The factors rated as most important were the same as observed in previous waves of the study – the estimated total bill amount and the discounts offered.
- A significant decline in the average importance rating for other (relatively higher) factors suggests businesses are increasingly price focussed in their switching decision making.



Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all and 10 means extremely important?
Base: NEM participants in 2018 who have switched energy company, plan or deal in the past 5 years (n=210)

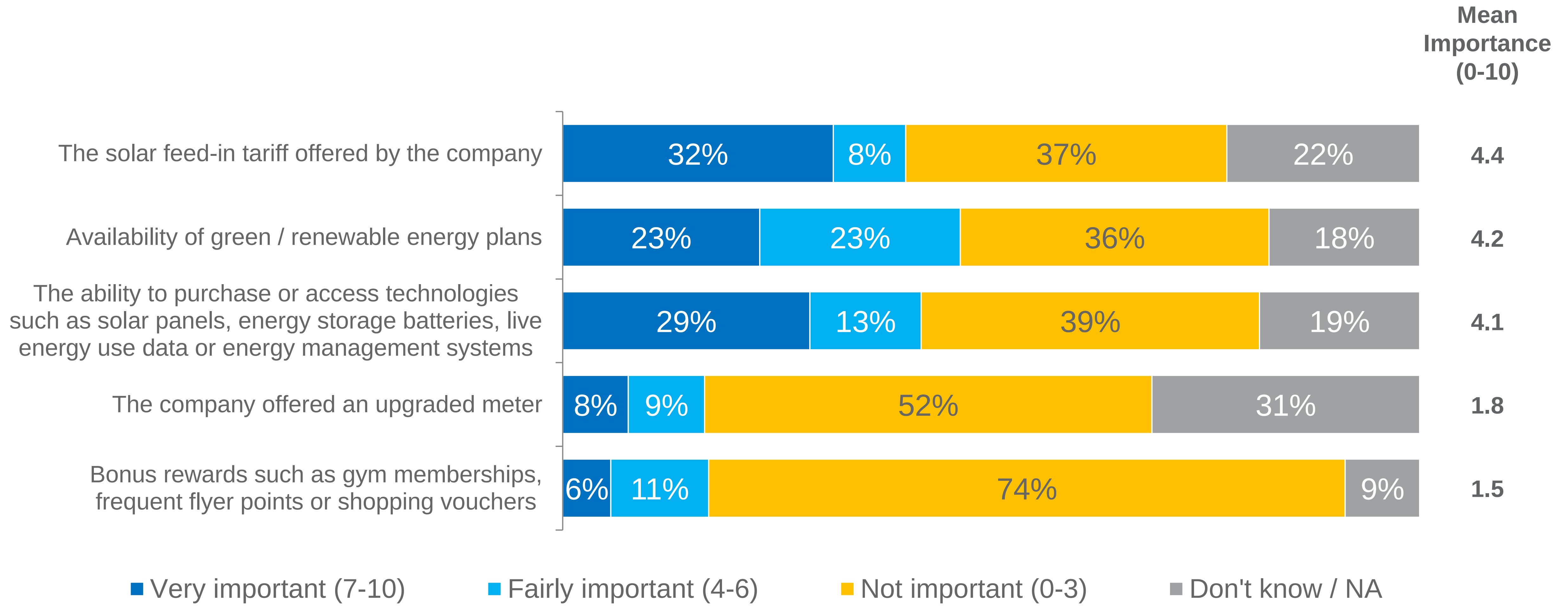
Most important factors in past switching - trends



Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all and 10 means extremely important?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years: 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210)

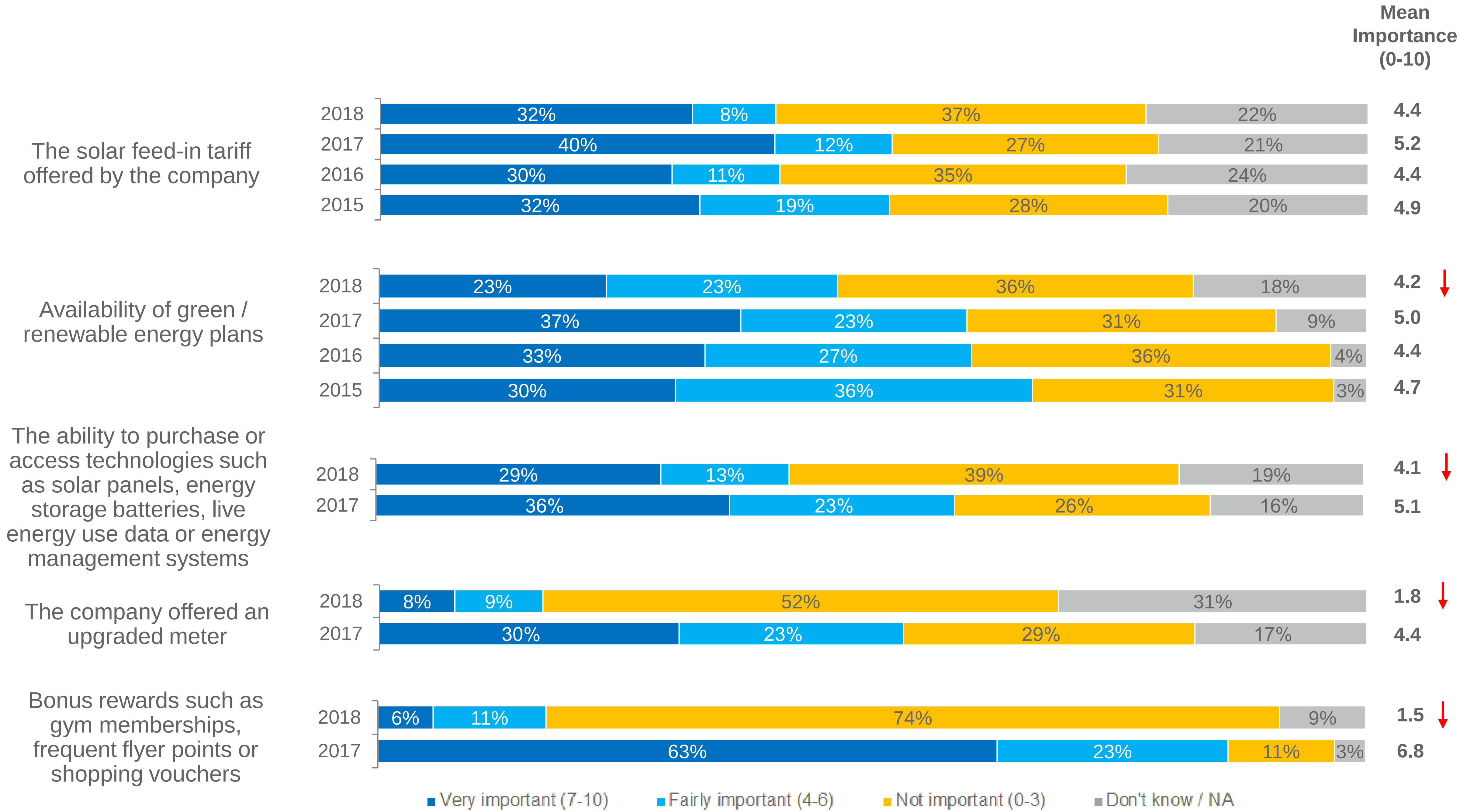
Least important factors in past switching (2018)

- Factors considered of relatively less importance were the same as observed in previous waves.
- Of note, the average importance of factors augmenting the actual provision of energy (such as offer of technologies including energy infrastructure, upgraded meters or bonus rewards) dropped significantly in 2018 from previously observed levels.
- 'The solar feed-in tariff offered by the company is significantly less important than average to businesses in Victoria.



Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all and 10 means extremely important?
Base: NEM participants in 2018 who have switched energy company, plan or deal in the past 5 years (n=210)

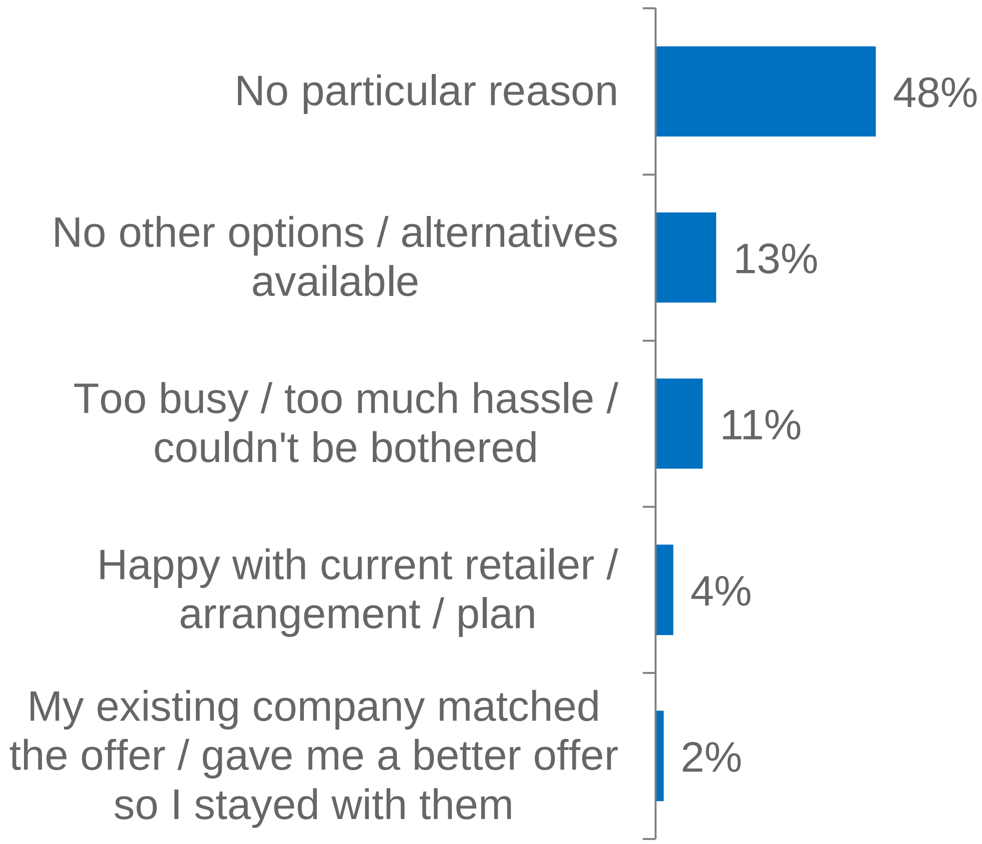
Least important factors in past switching - trends

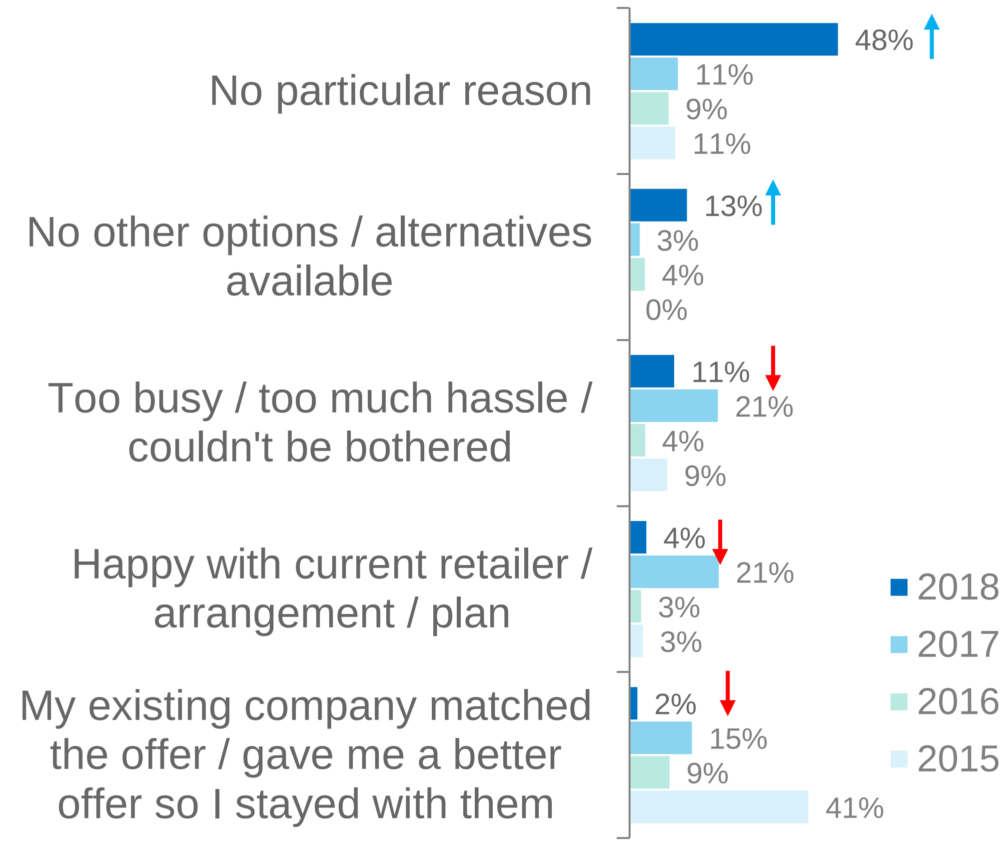


Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all and 10 means extremely important?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years: 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210)

Reasons for not switching

- Of those who had not investigated switching options over the past 12 months, the majority of these (48%) businesses could not identify a specific reason for this – suggesting they could be encouraged to switch into the future.
- No statistically significant differences in reasons for non-switching were observed by business size, location and industry type.





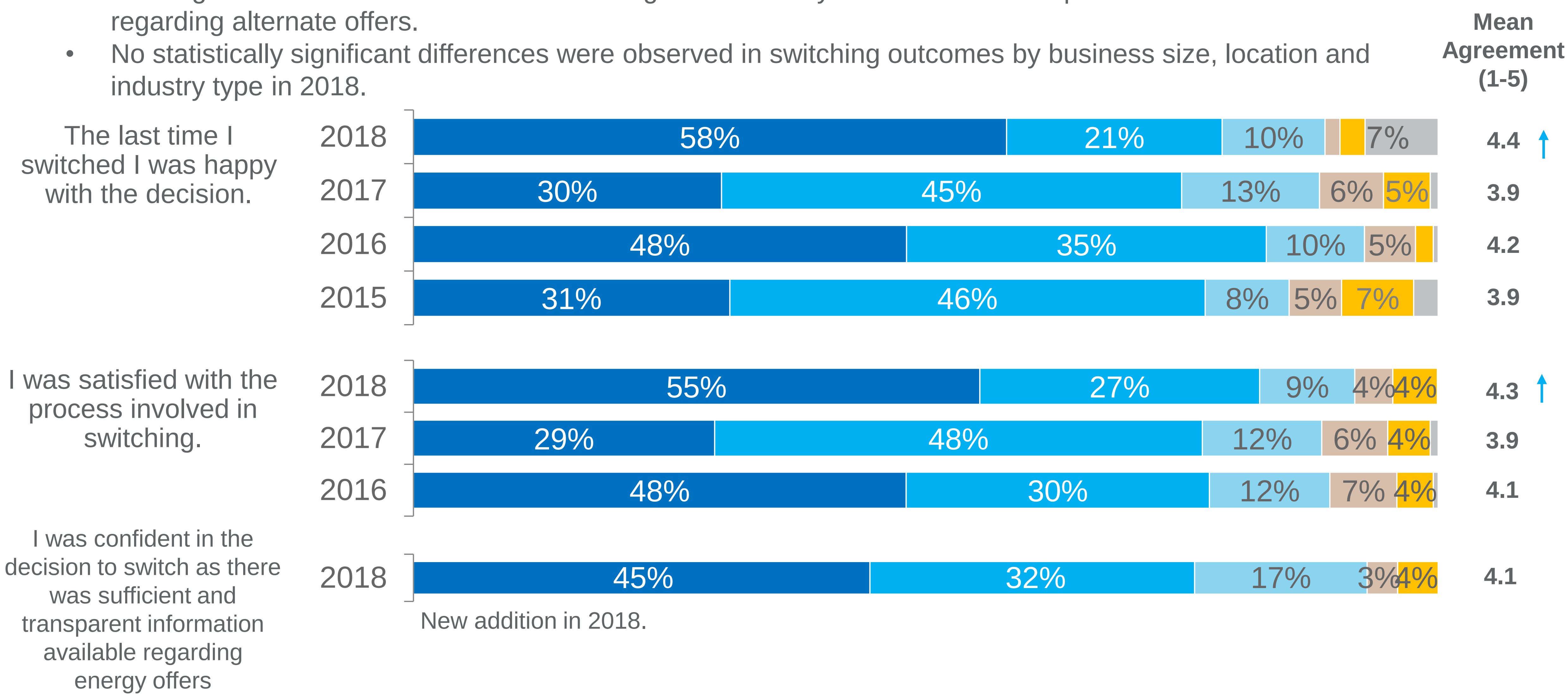
Q32. Are there any reasons you haven't investigated different options or changed your business's energy company or plan in the last 12 months? Any other reasons?
Base: NEM participants who have not switched in the past 5 years in 2015: (n=39); 2016 (n=44); 2017 (n=259); 2018 (n=114)

colmar brunton.

Switching outcomes

Switching outcomes

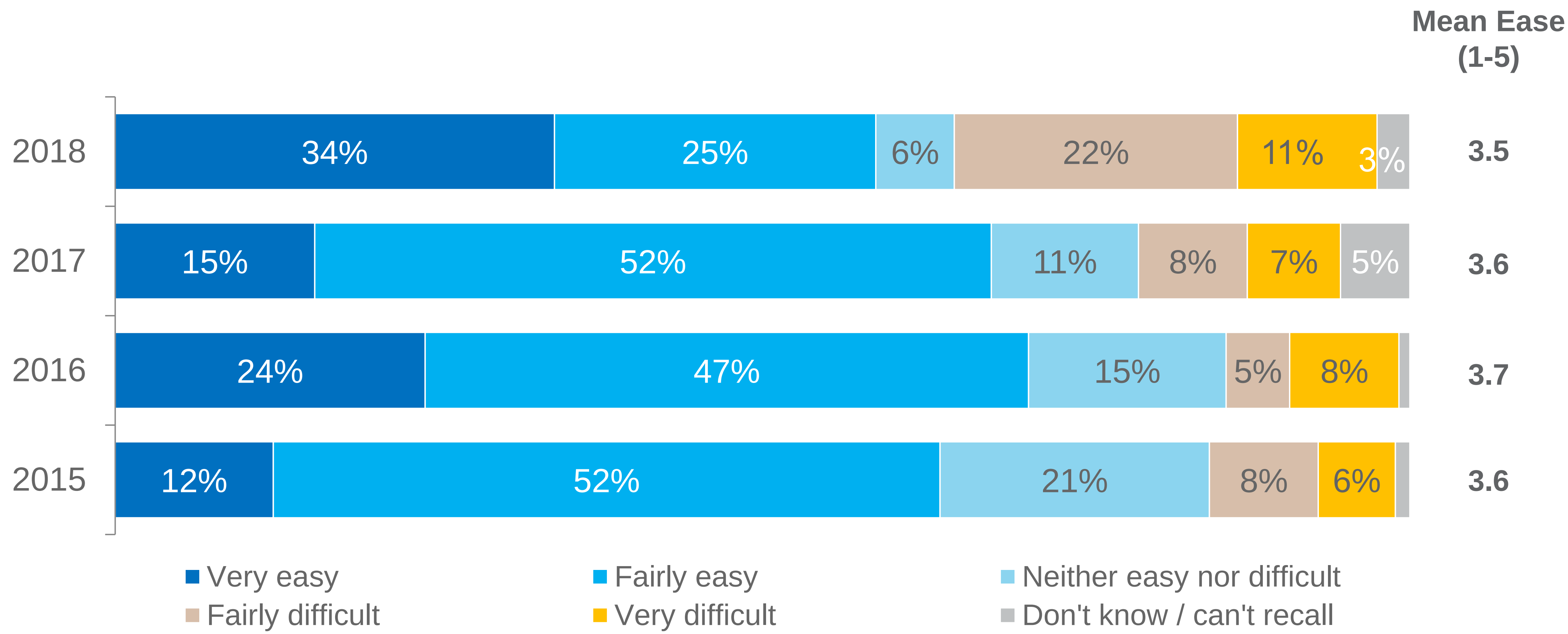
- Encouragingly, those that reported switching provider or plan within the past 5 years were generally very satisfied with the outcome.
- In 2018, there were significant increases in agreement that businesses were happy with their most recent switching decision (4.4, up from 3.9 in 2017) and that they were satisfied with the process involved in switching (4.3, up from 3.9).
- Most agreed that their confidence in switching was driven by sufficient and transparent information regarding alternate offers.
- No statistically significant differences were observed in switching outcomes by business size, location and industry type in 2018.



Q50. And having switched your business's energy company, plan or deal, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.
Base: NEM participants who have switched energy company, plan or deal in the past 5 years: 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210)

Ease of comparing offers

- The average level of ease of comparing alternate offers when deciding whether or not to switch was broadly in line with previous waves, although there was a rise in the proportion of businesses rating this as either fairly difficult or very difficult (33%, up from 16% in 2017).
- No statistically significant differences were observed in the ease of comparing offers by business size, location and industry type in 2018.



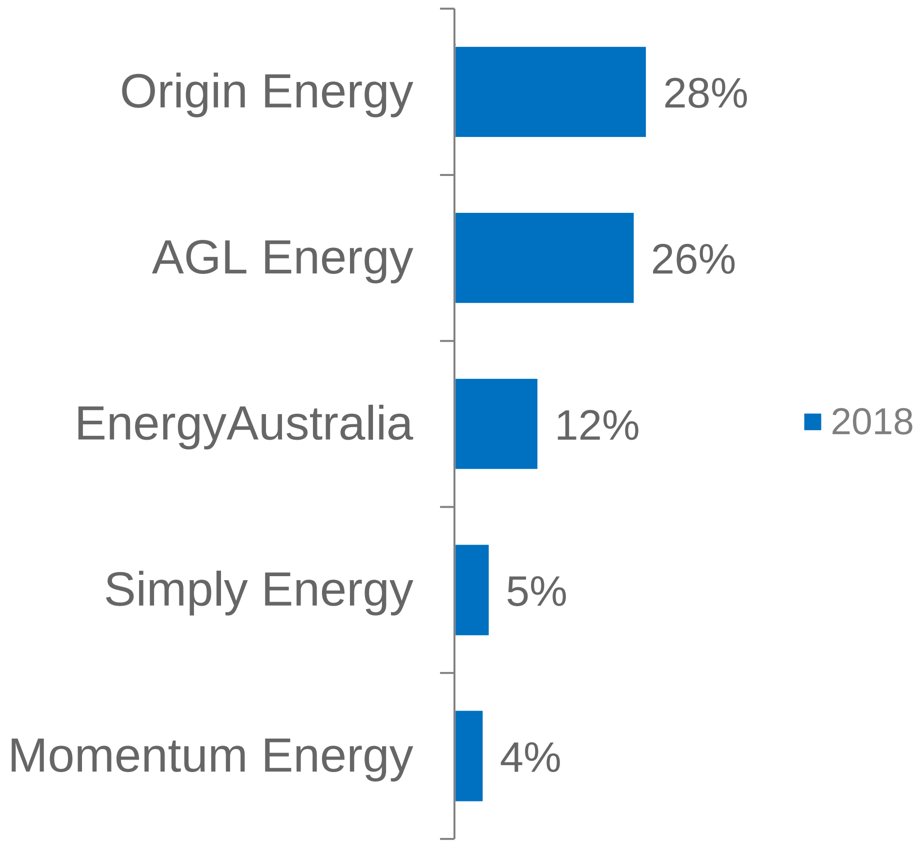
Q51. The last time you switched your business's energy company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years: 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210)

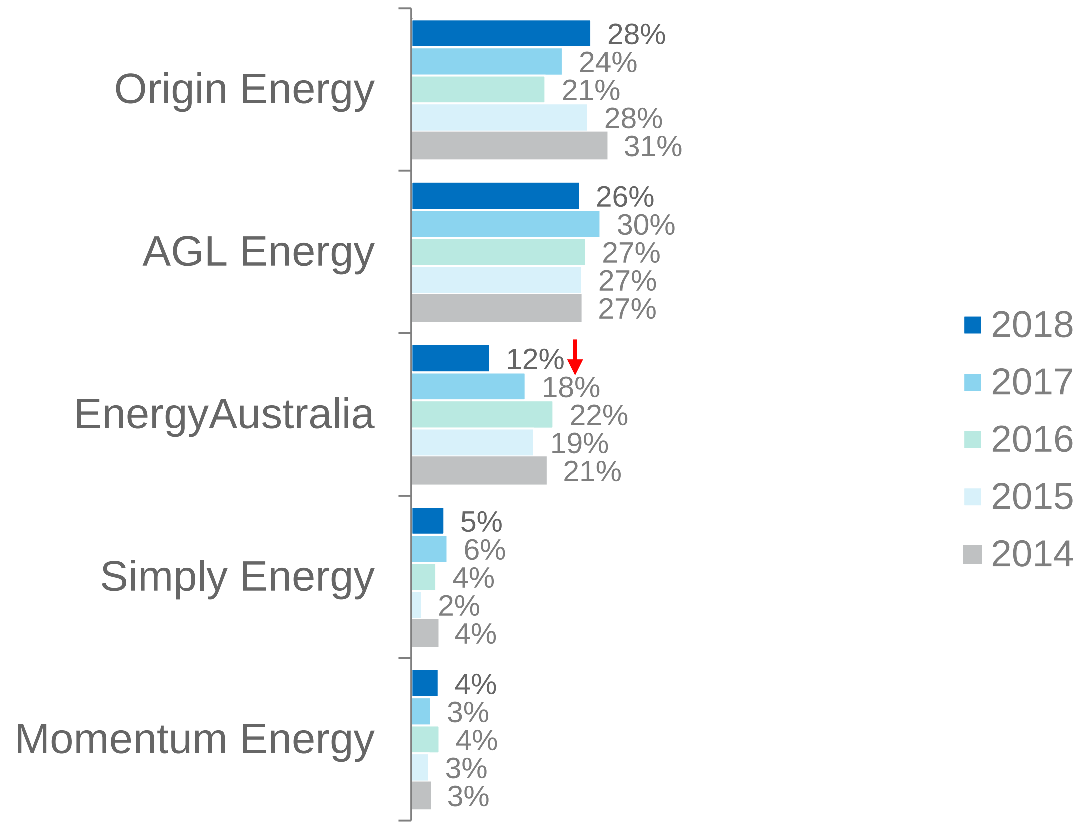
Current energy contract

Top 5 NEM energy retailers - electricity

Electricity

- The three major energy retailers were observed as per previous years (Origin Energy, AGL Energy and Energy Australia).
- Amongst the top three, some movement has been observed in total share of electricity market.
- Victorian businesses are significantly more likely than average to be connected with Simply Energy and Momentum Energy in 2018.
- NSW businesses are significantly more likely than average to be connected with Energy Australia.
- SA businesses are significantly more likely than average to be connected with AGL Energy.
- South East QLD businesses are significantly more likely than average to be connected with Origin Energy.



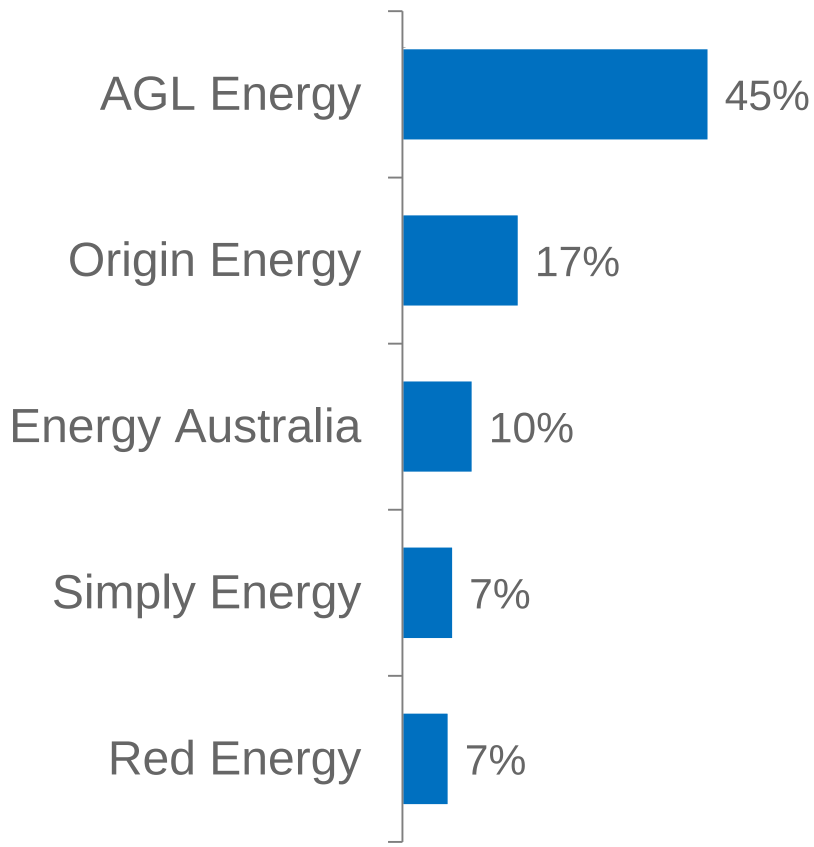


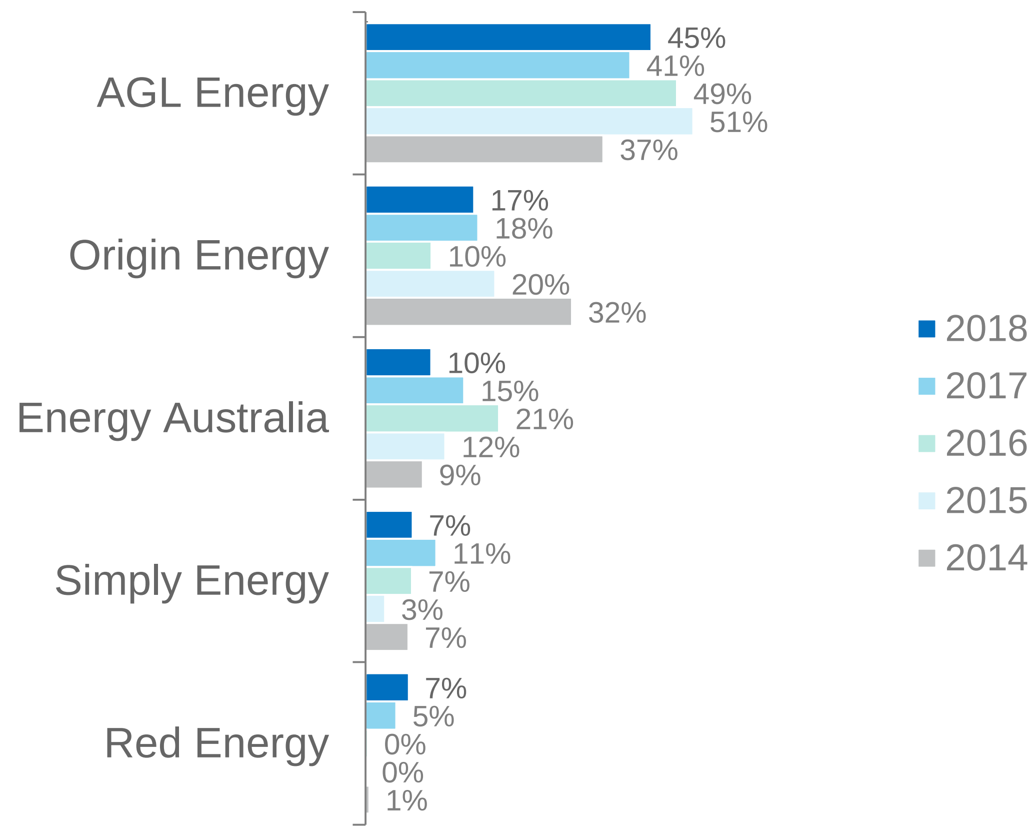
Q1. What is the name of the company that you receive a bill from for your electricity use?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327).

Top 5 ECGM energy retailers - gas

Gas

- Amongst the top three, some movement has been observed in total share of electricity market.





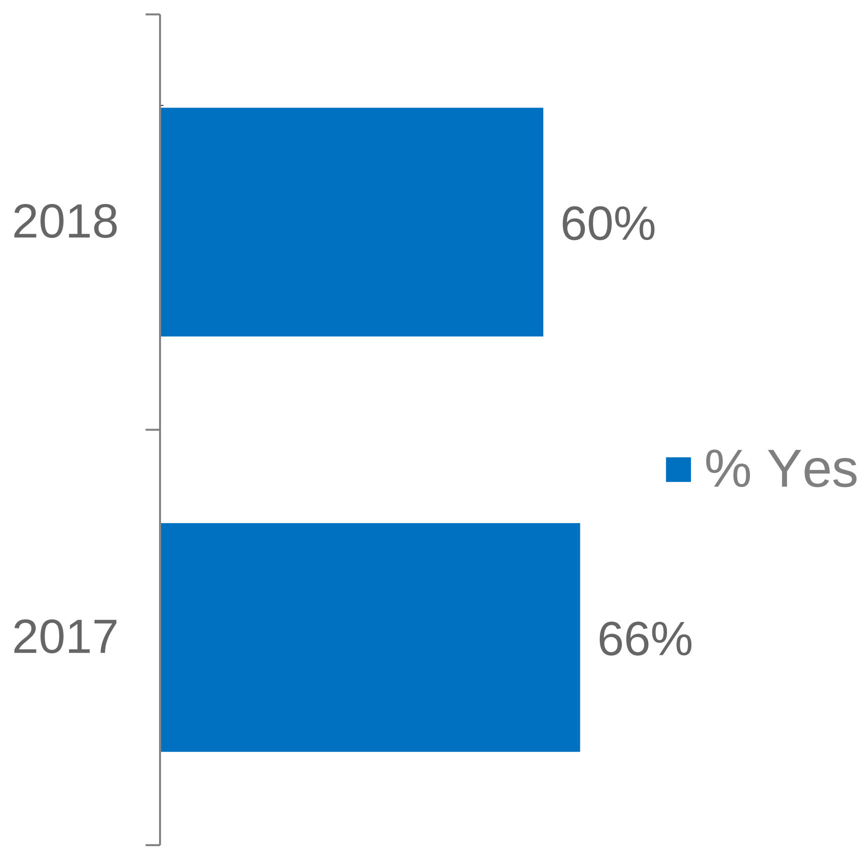
Q6. What is the name of the company you receive a bill from for your mains connected gas use?
Base: ECGM participants: 2014 (n=97); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60).

colmar brunton.

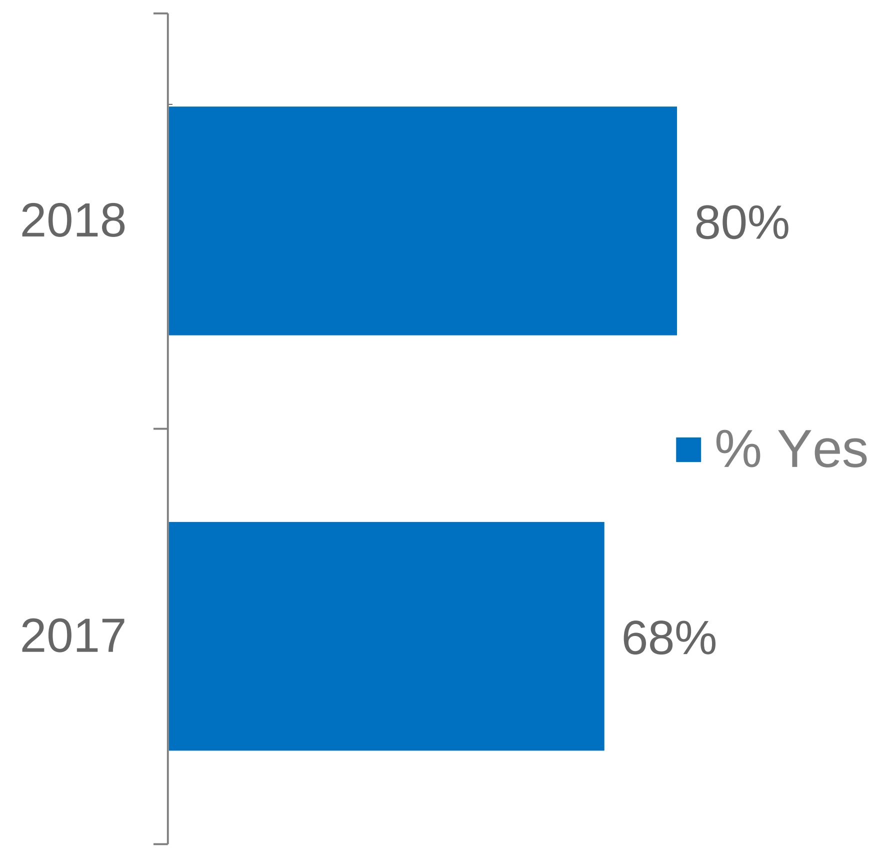
Rewards or discounts received

- There are no statistically significant differences in the incidence of rewards or discounts received between 2018 and 2017 among both electricity and gas providers.
- Businesses in NSW and SA are significantly more likely than average to have received specific rewards or discounts by their electricity retailers, while businesses in the ACT, Rest of QLD and TAS are significantly less likely than average to have received specific rewards or discounts by their electricity retailers.

Electricity



Gas



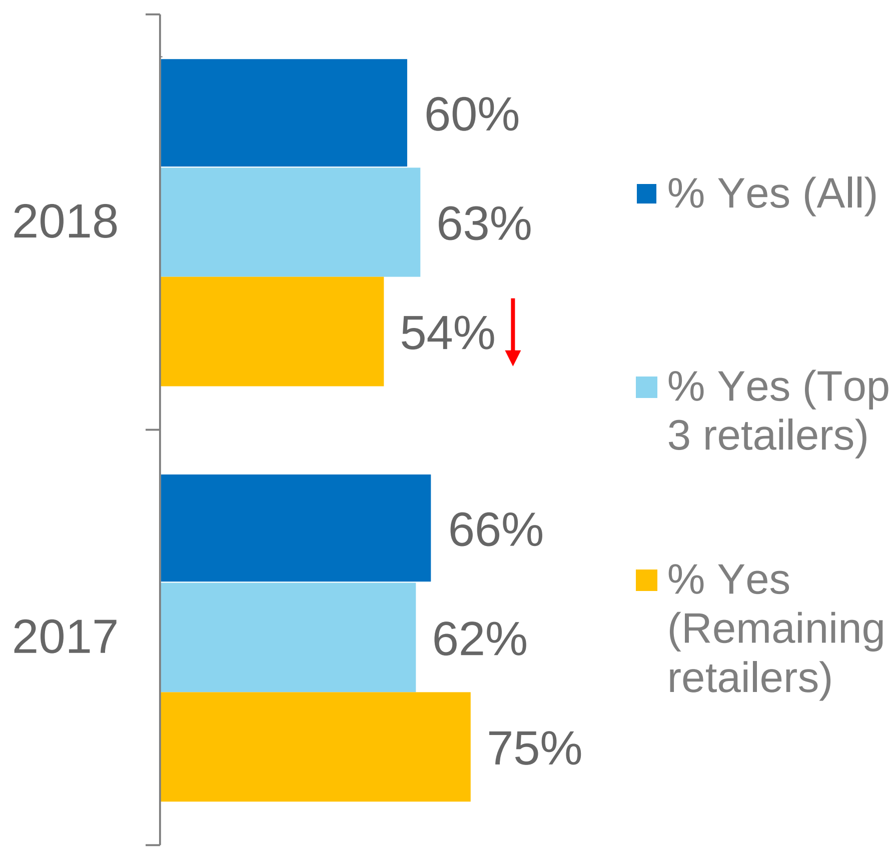
Q70. Does your business' electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit?

Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit?
Base: NEM participants: 2017 (n=432); 2018 (n=327). ECGM participants: 2017 (n=143); 2018 (n=60).

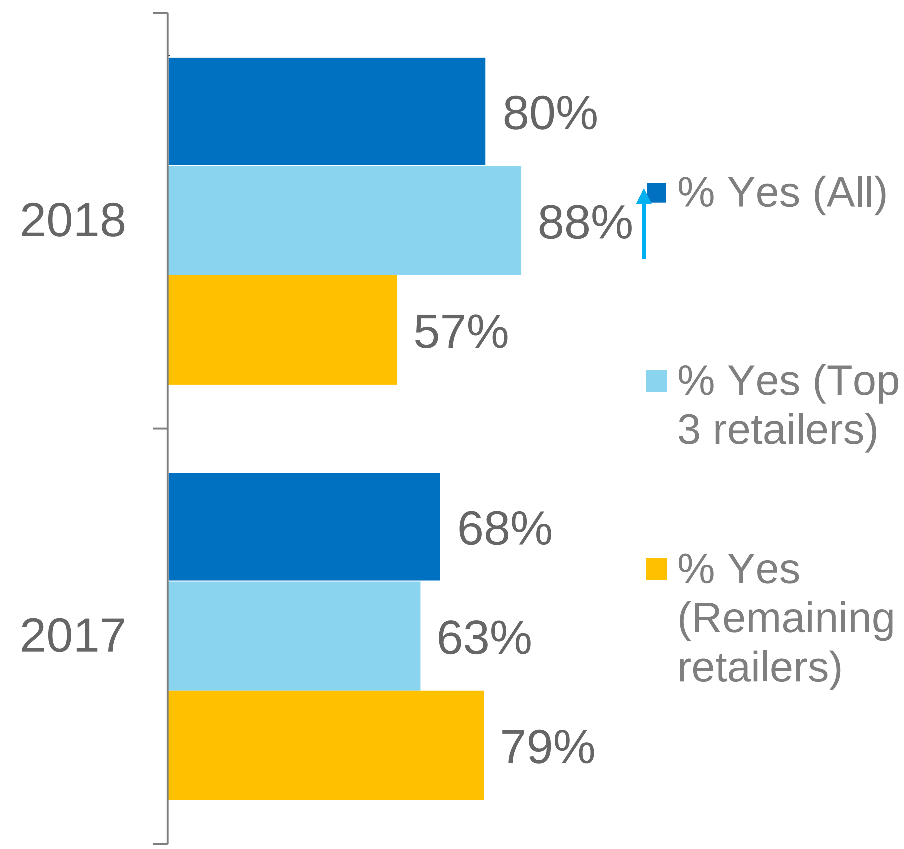
Rewards / discounts received by top 3 retailers

- Businesses in 2018 that use electricity retailers outside of the top 3 (consisting of AGL Energy, Origin Energy and Energy Australia), were significantly less likely to report being offered rewards or discounts.

Electricity



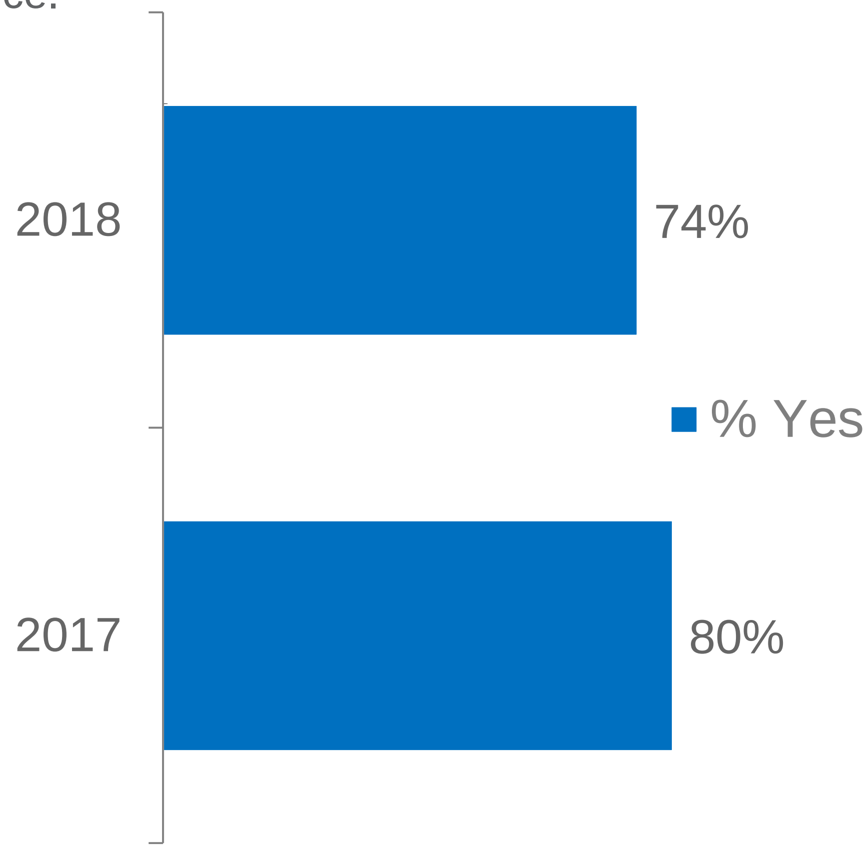
Gas



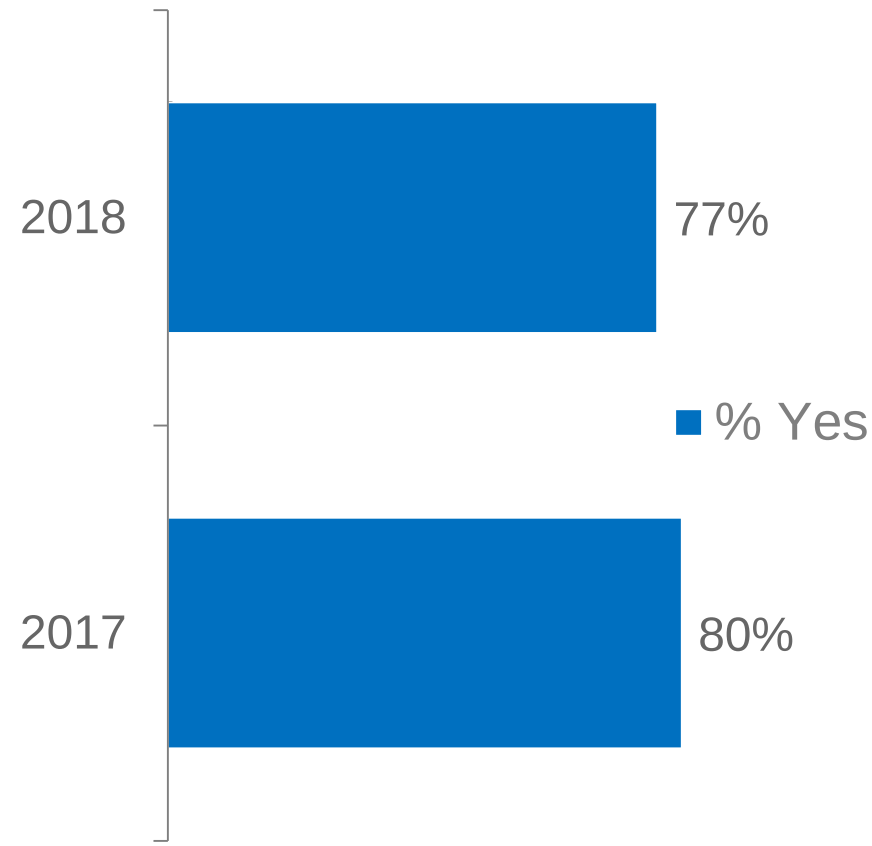
Q70. Does your business' electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit?
Base: All NEM participants: 2017 (n=432); 2018 (n=327). ECGM participants: 2017 (n=143); 2018 (n=60).

Active choice in current contract

- Approximately three quarters (74%) of businesses in 2018 reported that they actively chose to be on their electricity contract or plan, and a similar proportion (77%) of gas participants said they had actively chosen their gas contract or plan.
- Businesses in NSW and VIC are significantly more likely than average to have actively chosen their current contract or plan, while businesses in Rest of QLD and TAS are significantly less likely to have had a choice.



Electricity

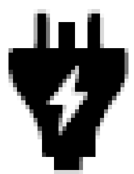


Gas

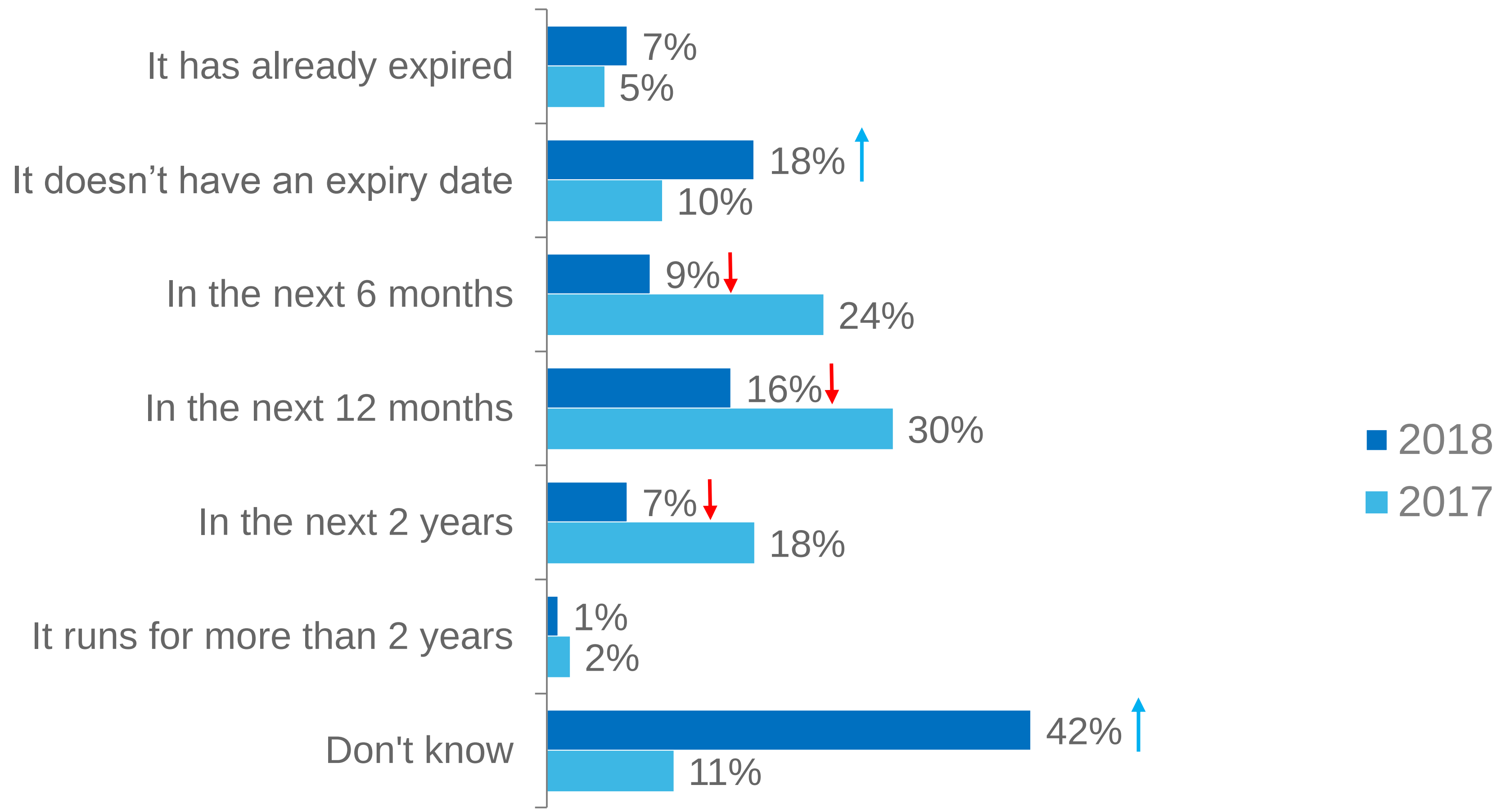
Q66 / Q75. Did you actively choose to be on this particular contract or plan?
Base: NEM participants whose business is currently on any kind of contract or plan for the electricity service in 2017 (n=199); All NEM participants in 2018 (n=327). ECGM participants whose business is currently on any kind of contract or plan for the gas service in 2017 (n=75); All ECGM participants in 2018 (n=60).

Expiration of electricity contract

- Overall businesses are not well-informed about the expiry date of the electricity contract. The majority of businesses in 2018 (42%) do not know if or when their electricity contract or plan expires. Furthermore, approximately one in five businesses (18%) stated that ‘it doesn’t have an expiry date’.
- No statistically significant differences were observed in the expiration of electricity contract by business size, location and industry type in 2018.



Electricity

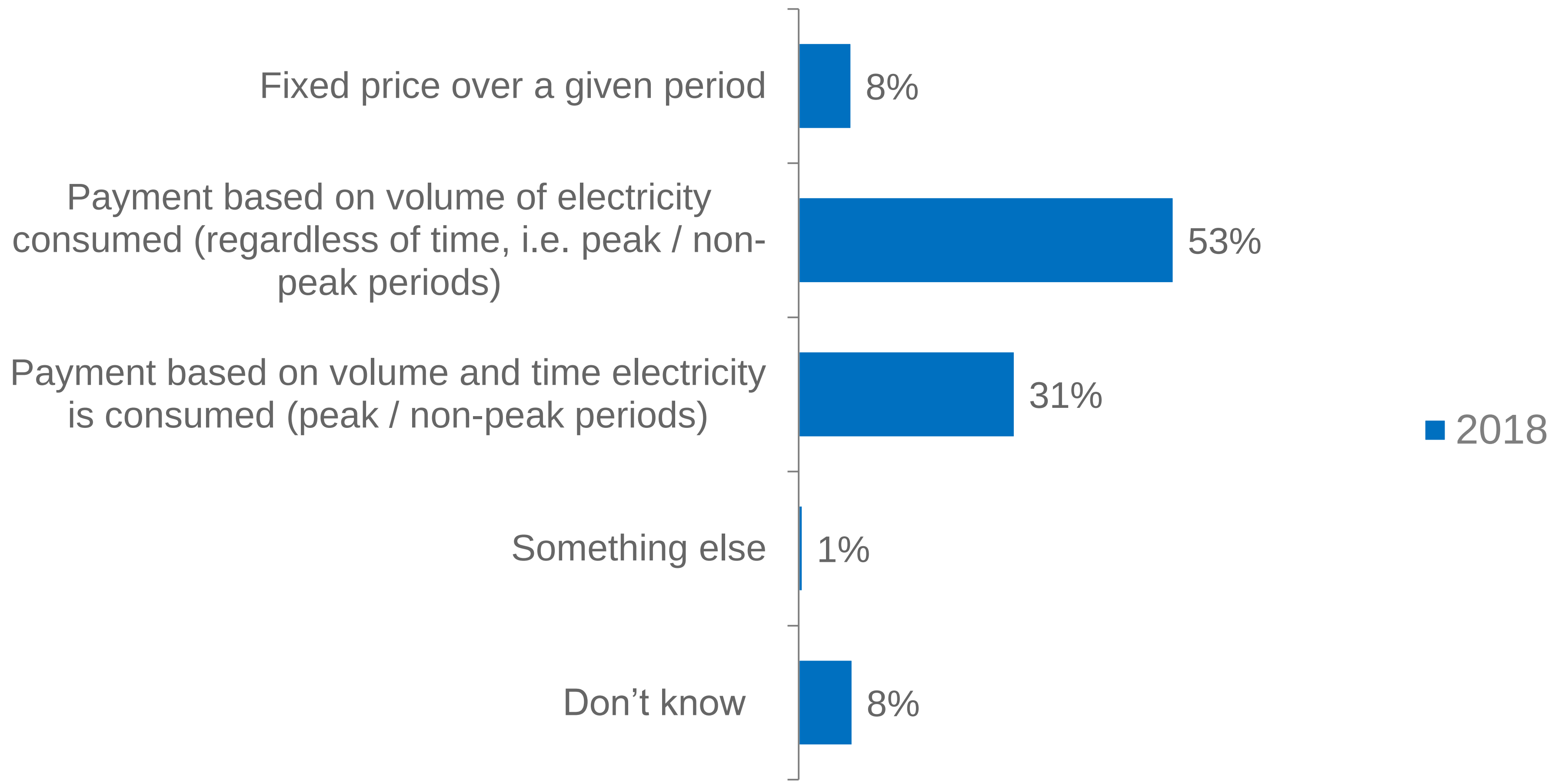


Q65. Do you know if or when your electricity contract or plan expires?
Base: All NEM participants: 2017 (n=199); 2018 (n=327).

Electricity billing arrangement (new question in 2018)

- The majority (53%) of businesses reported that their electricity bill is based on the volume of electricity consumed, and almost a third (31%) stated that their payment is based on a combination of volume and time (i.e. peak and non-peak periods).

Electricity

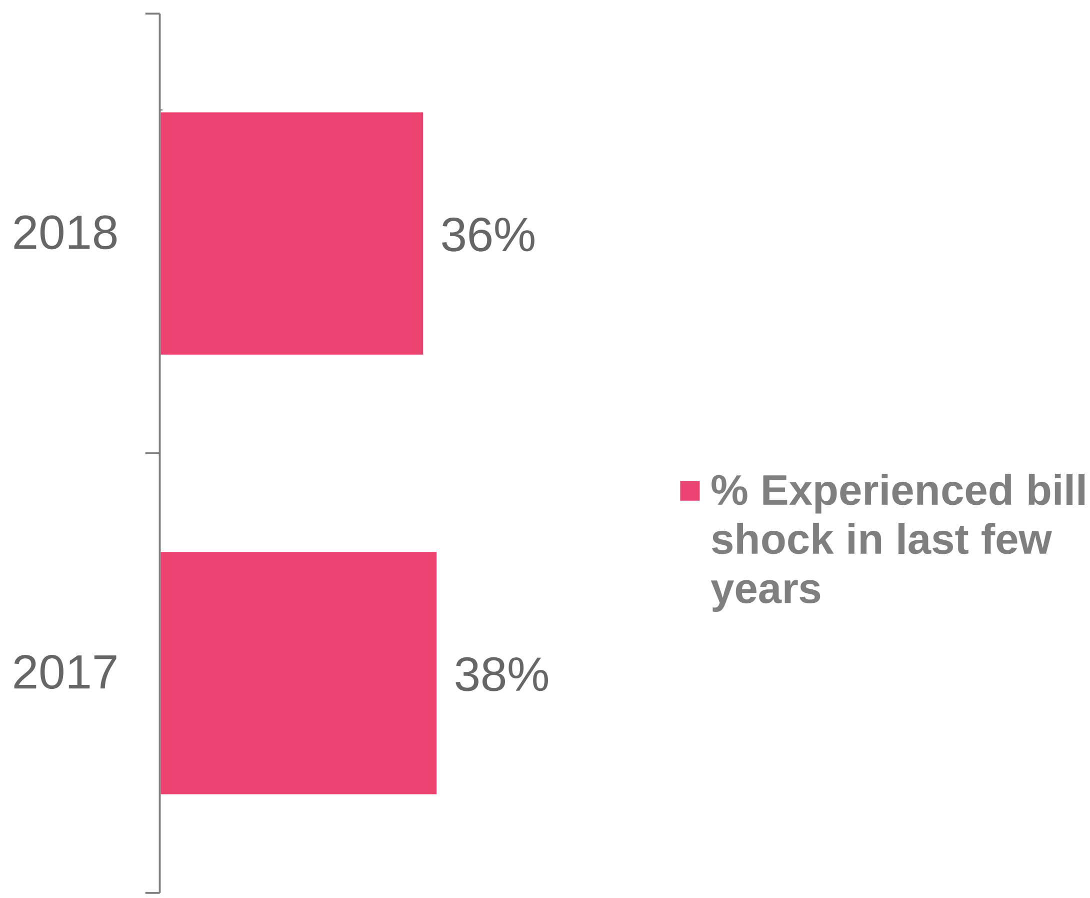


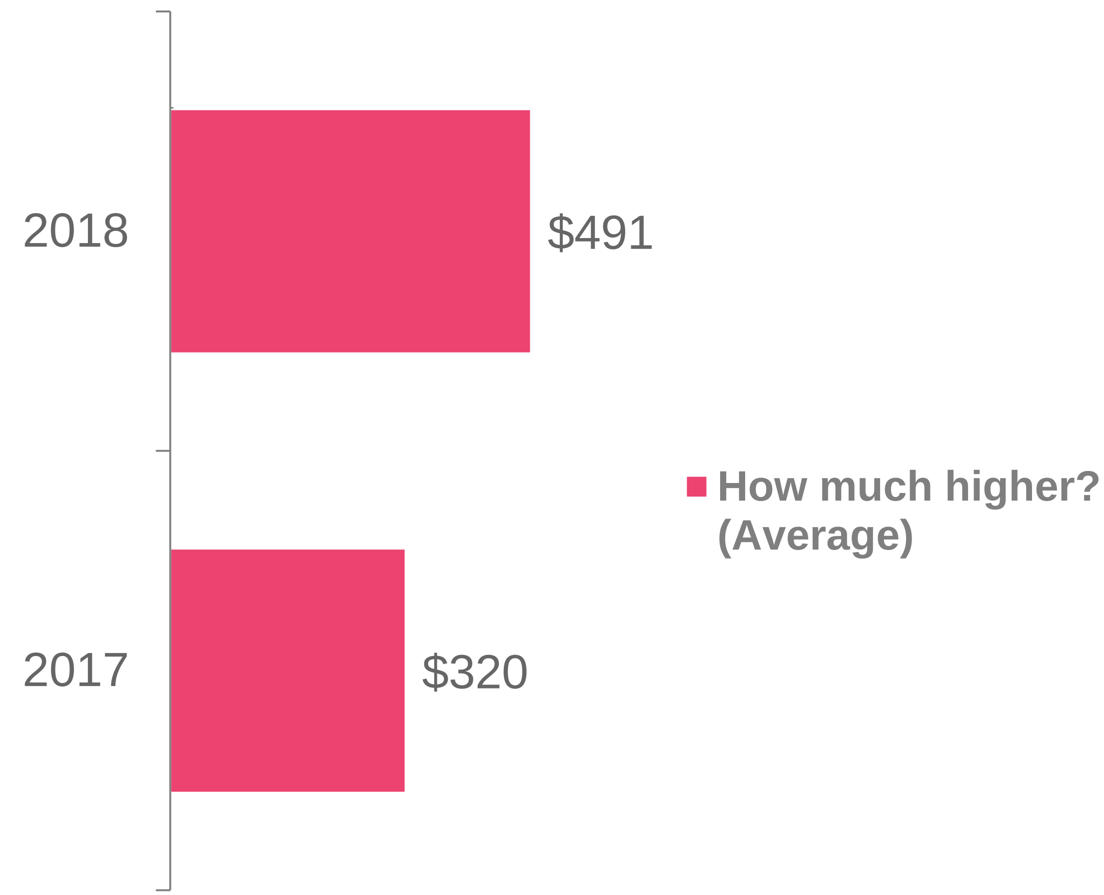
Note: This question was added in 2018.
Q66a. Businesses can often choose to be charged a fixed price for their electricity over a given period; or be charged based on the volume of electricity consumed (and/or the time the electricity is consumed). Which of the following best describes your current billing situation?
Base: All NEM participants in 2018 (n=327).

Bill shock and responses

Bill shock

- 36% of businesses report to have experienced bill shock in the last few years. This figure is not statistically different to the 2017 result.



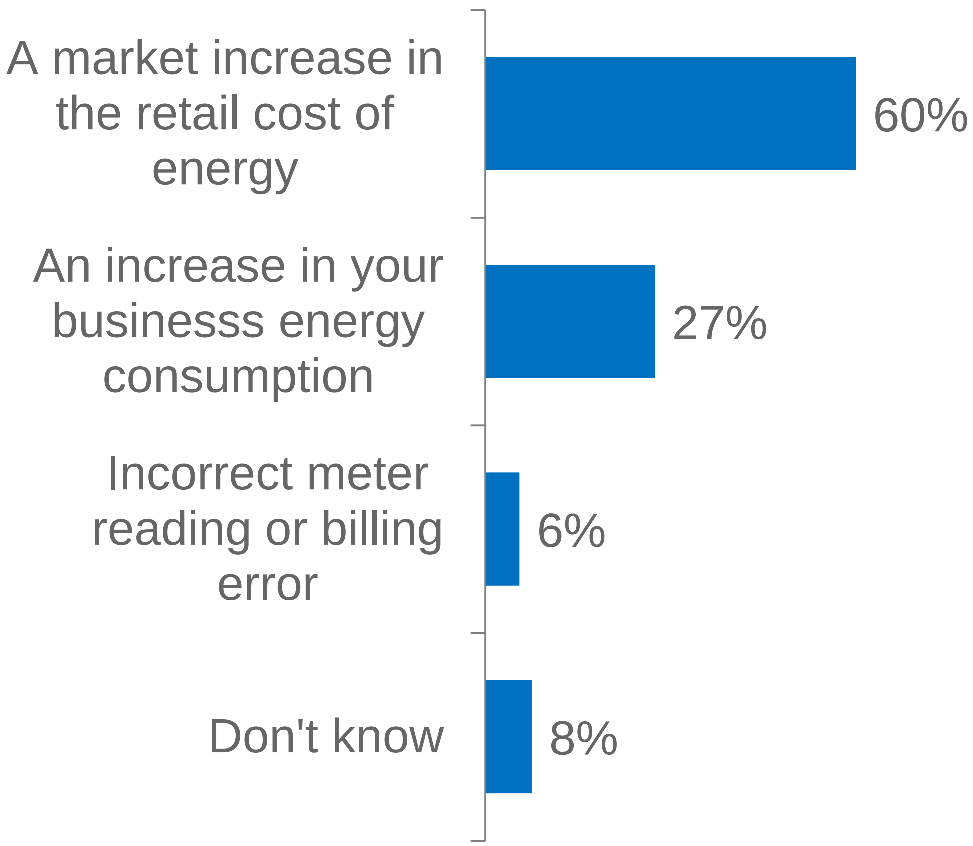


Q80. Have you had any energy bills in the last few years where the amount really surprised or shocked you? Q81. The last time this happened, how different was it from your normal bills? Q81a. How much higher was it from your normal bills, in dollar terms?
Base: All NEM participants: 2017 (n=550); 2018 (n=327). NEM participants who have experienced higher than normal bill shock : 2017 (n=172); 2018 (n=115).

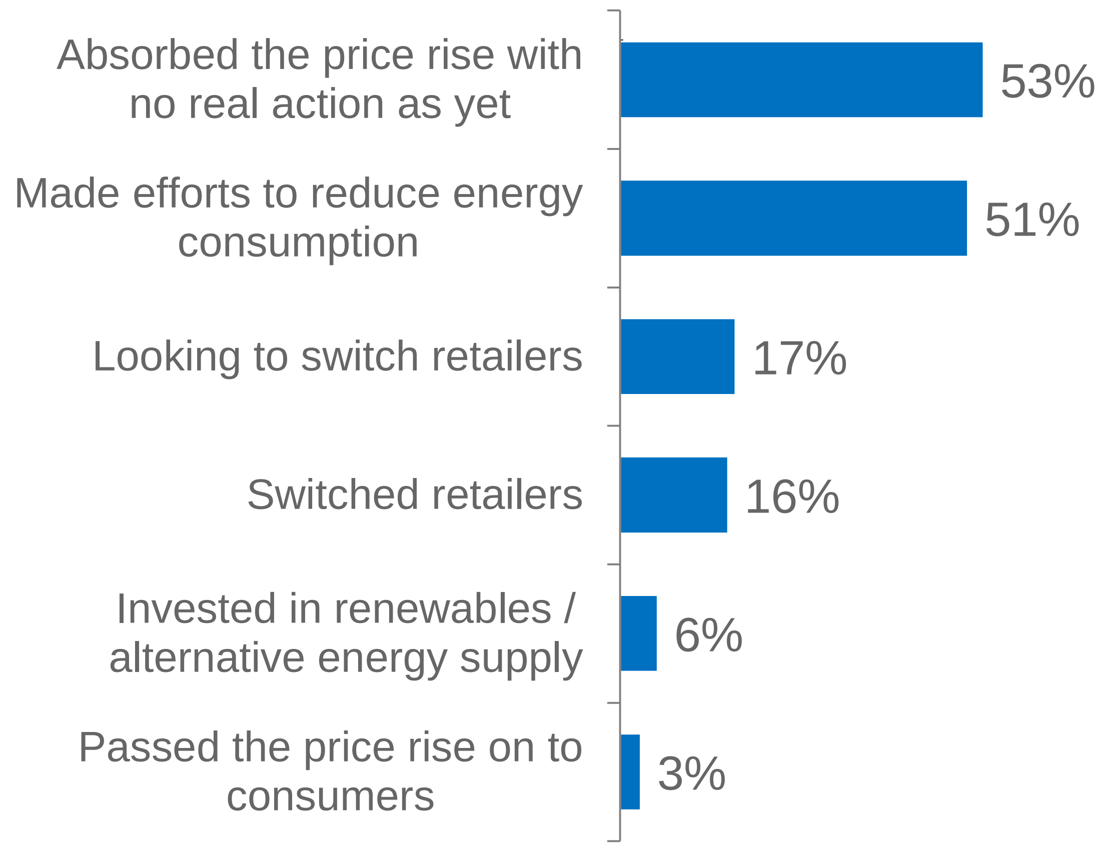
Reasons for bill increase and business responses (2018)

- The majority of those experiencing surprise or shock from an energy bill (60%) indicted this was due to a market increase in the cost of retail energy, followed by an increase in their consumption level (27%).
- In terms of actions taken in response to the surprise bill, the most common were 'absorbing the price rise with no real action yet (53%), followed by 'made efforts to reduce energy consumption" (51%).

Reasons for bill increases



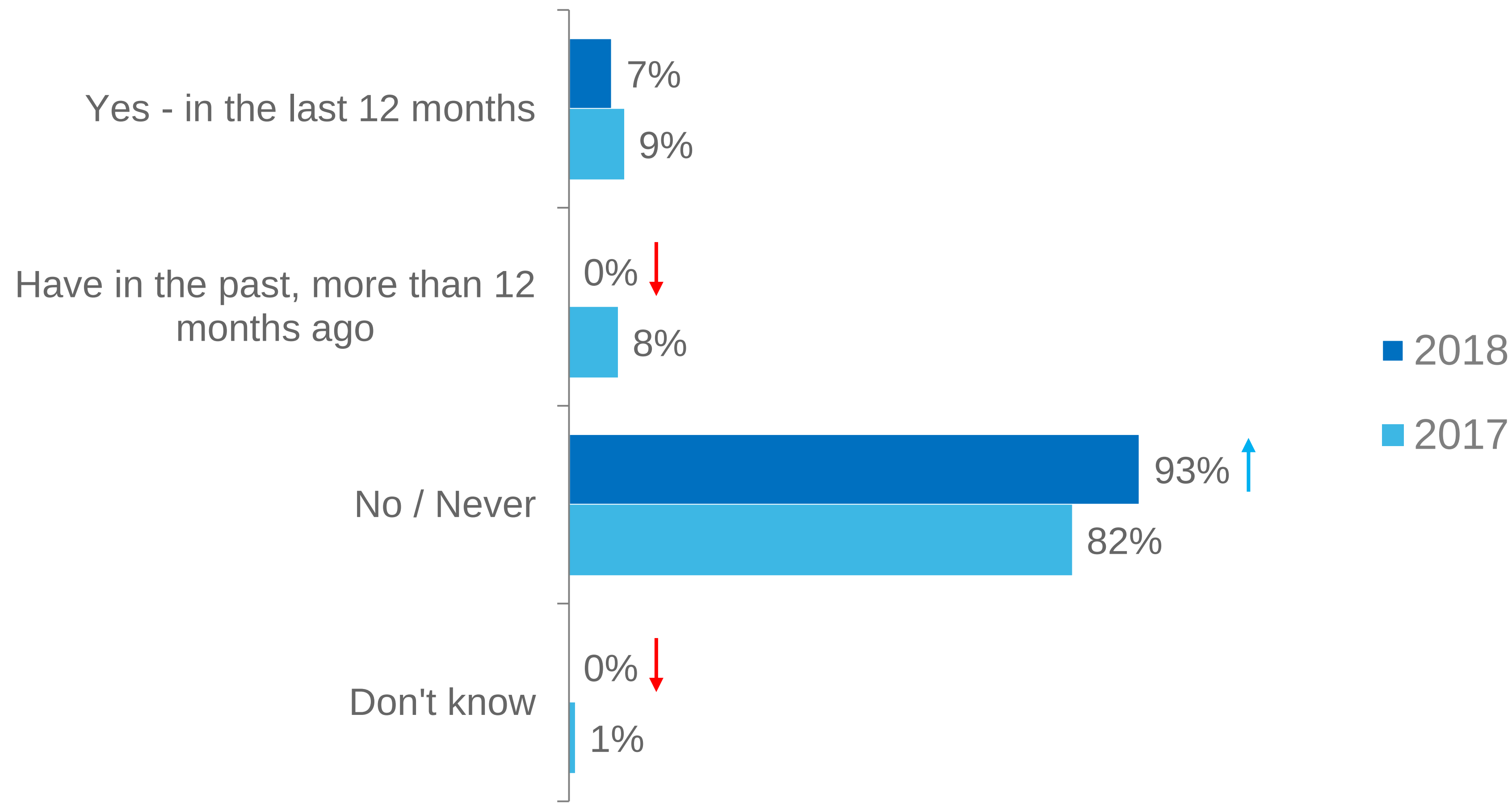
Business responses to bill increases



Q83. You have indicated that your last bill surprised or shocked you as it was higher than a normal bill. What do you think is the main reason for this price increase? Q82. How has your business responded to the increased cost of energy? What action(s), if any, has your business taken? Base: NEM participants who experienced bill shock in the last few years: 2018 (n=111).

Financial difficulty in last 12 months

- Relatively few businesses operators reported experiencing financial difficulty in paying energy bills over the past 12 months (7%).
- Businesses in SA were significantly more likely (17%) to have experienced financial difficulty.

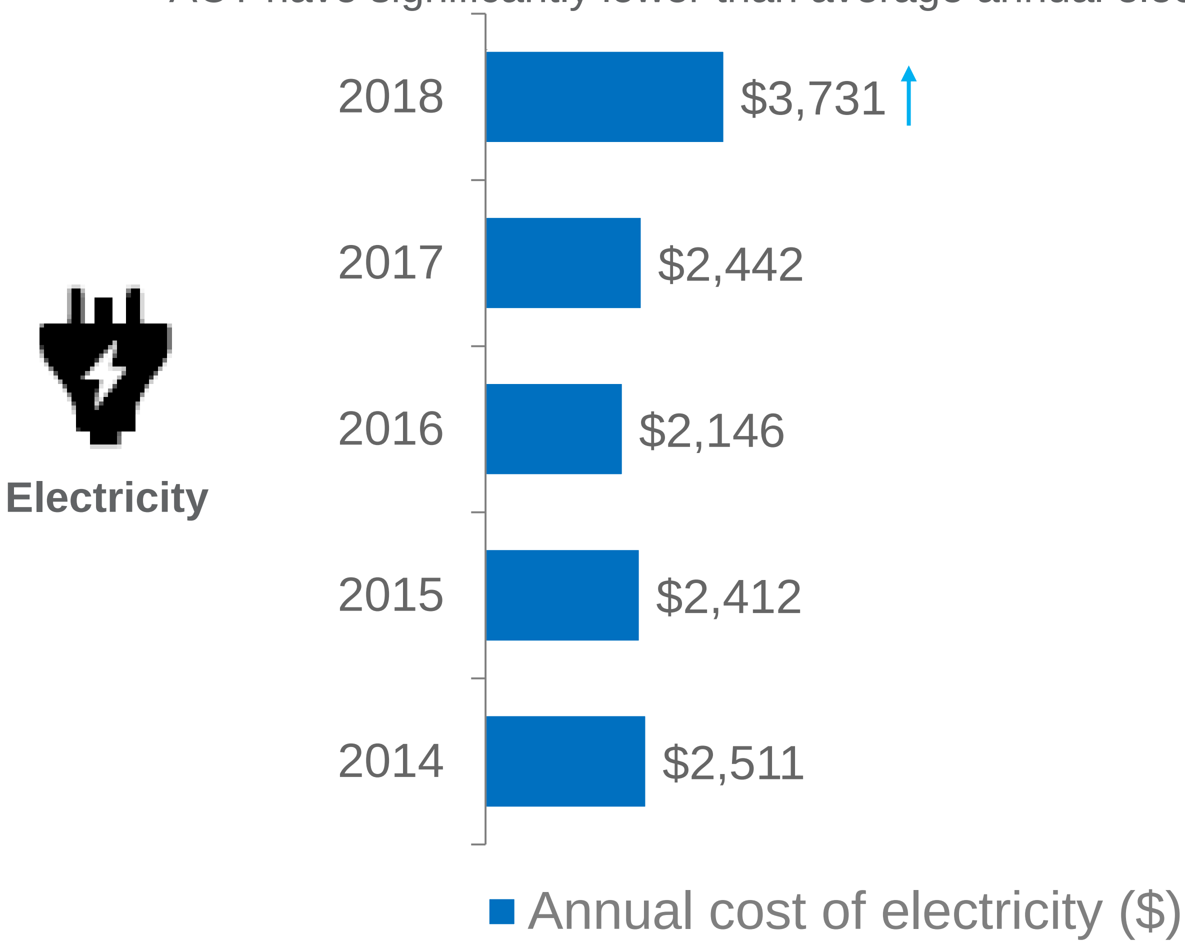


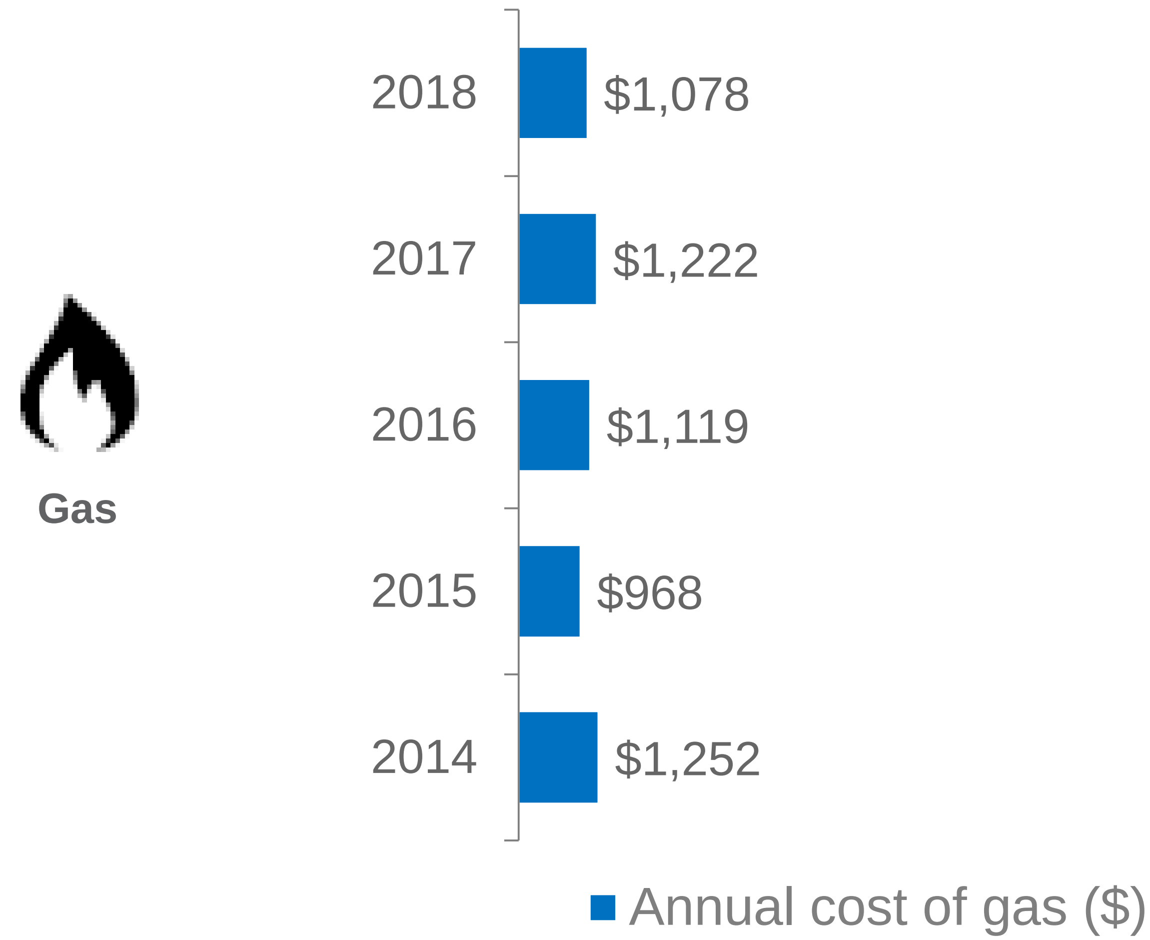
D29. In the last 12 months has your business experienced any financial difficulty in paying energy bills?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Savings required to consider switching

Annual energy costs

- There has been a significant increase in the reported average cost of electricity in 2018 ($3,731, up from an annual average of $2,442 in 2017).
- Larger businesses (20-199 employees), businesses in regional areas, South Australia, QLD (excluding South East QLD) , and those in the ‘Accommodation and Food Services Industry’ have significantly higher than average annual electricity costs.
- Smaller businesses (non-employing and 1-4 employees), businesses in metro areas, and those in Victoria and ACT have significantly lower than average annual electricity costs.



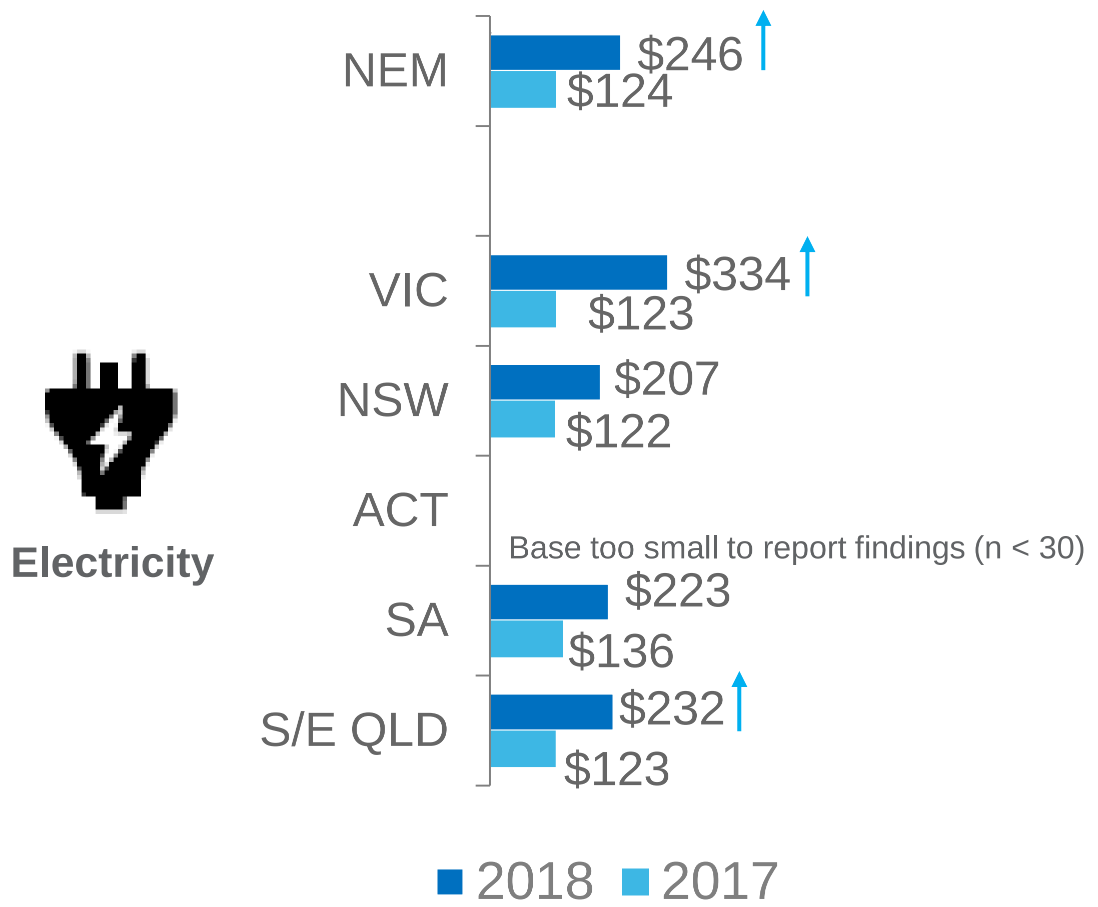


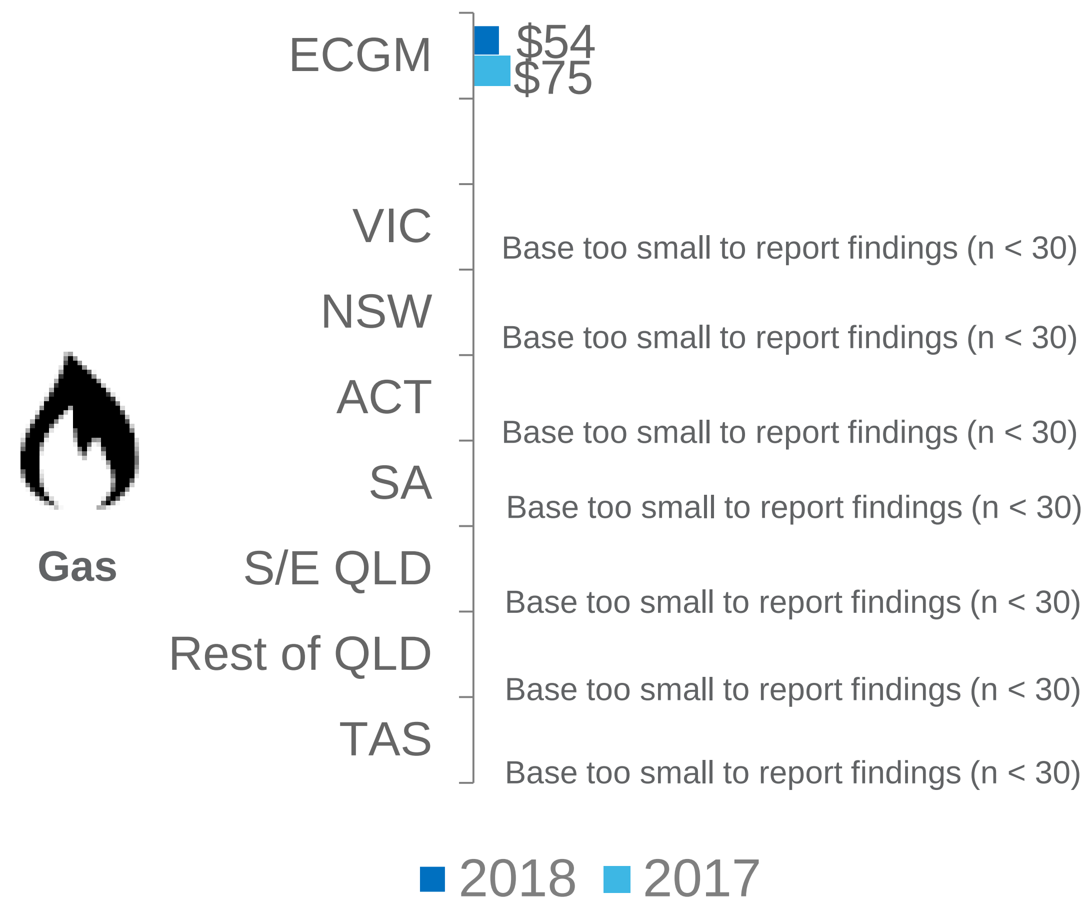
D3. How much was your business’ most recent electricity bill? D3a. How often does your business receive your electricity bill? D4. How much was your business’s most recent gas bill? D4a. How often does your business receive your gas bill?

Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327)
ECGM participants in 2014 (n=123); 2015 (n=124); 2016 (n=106); 2017 (n=156); 2018 (n=50)

Average quarterly savings required to consider switching

- Perhaps reflecting the increased annual average costs, the amounts businesses identified they would need to save in order to seriously consider switching their energy company or plan also rose significantly in the 2018 survey ($246 vs. $124 in 2017).





Q60. Relative to that last electricity bill, how much money would you need to save in order to seriously consider changing your business' company or plan? Q61. Relative to that last gas bill, how much money would you need to save to seriously consider changing your business' company or plan?
Base: All NEM participants – excluding those who have experienced bill shock 2018 NEM (n=206); 2017 NEM (n=212); 2018 VIC (n=53); 2018 NSW (n=52); 2018 SA (n=36); 2018 S/E QLD (n=44). 2017 NSW (n=50); 2017 VIC (n=47), 2017 S/E QLD (n=47); 2017 SA (n=47)
ECGM participants 2018 ECGM (n=36); 2017 ECGM (n=69);

colmar brunton.

Adoption of new technologies

Use / uptake of solar panels

- There was a significant increase in the number of business operators who reported they definitely won't have solar panels within the next two years (51%, up from 22% in 2017).
- Of the 1 in 5 businesses that have solar panels, the vast majority of these report owning these outright (93%).
- No significant differences were observed by business size, location and industry type.

	2018	2017
Already have	18%	19%
Definitely will	3%	5%
Probably will	7% ↓	13%
Might	10% ↓	22%
Probably won't	12% ↓	19%
Definitely won't	51% ↑	22%

	2018 (n=61)	2017 (n=97)
Own it outright	93%	90%
Own it with a loan purchase	3%	7%
Lease it	4%	1%
Something else	1%	0%
Don't know	0%	2%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. D5f. Which of the following best describes your ownership arrangement of your business's [insert technology] – do you [read out codes]?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Use / uptake of solar hot water systems

- Approximately 1 in 10 businesses reported having solar hot water systems in their businesses (11%, in line with the 9% observed in 2017).
- There was a significant increase in the number of business operators who reported they definitely won't have a solar hot water system within the next two years (62%, up from 25% in 2017).
- Businesses in the 'Agriculture, Forestry and Fishing' industry and sole traders are significantly more likely than average to already have solar hot water systems.

	2018	2017
Already have	11%	9%
Definitely will	2% ↓	7%
Probably will	3% ↓	10%
Might	3% ↓	23%
Probably won't	18% ↓	27%
Definitely won't	62% ↑	25%

	2018 (n=20)	2017 (n=44)
Own it outright	-	91%
Own it with a loan purchase	-	2%
Lease it	-	1%
Something else	-	0%
Don't know	-	5%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. D5f. Which of the following best describes your ownership arrangement of your business's [insert technology] – do you [read out codes]?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Use / uptake of batteries for storing electricity

- Battery uptake remains very low.
- Businesses in the ‘Agriculture, Forestry and Fishing’ industry significantly more likely than average to indicate they ‘definitely will’ be utilising batteries for storing electricity in the next two years.

	2018	2017
Already have	0% ↓	1%
Definitely will	3%	5%
Probably will	17%	17%
Might	7% ↓	27%
Probably won't	18% ↓	28%
Definitely won't	56% ↑	23%

→

	2018 (n=4)	2017 (n=6)
Own it outright	-	-
Own it with a loan purchase	-	-
Lease it	-	-
Something else	-	-
Don’t know	-	-

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. D5f. Which of the following best describes your ownership arrangement of your business’s [insert technology] – do you [read out codes]?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Use / uptake of electric vehicles

- Use of electric vehicles by businesses remains very low. There was a significant increase observed in the proportion who said they definitely wont have these within the next two years (67%, up from 36% in 2017).
- VIC businesses were significantly more likely than average to say that they ‘definitely will’ use electric vehicles.
- No significant differences were observed in 2018 by business size, and industry type.

	2018	2017
Already have	1%	1%
Definitely will	1%	2%
Probably will	2% ↓	7%
Might	8% ↓	21%
Probably won't	20% ↓	33%
Definitely won't	67% ↑	36%

	2018 (n=8)	2017 (n=6)
Own it outright	-	-
Own it with a loan purchase	-	-
Lease it	-	-
Something else	-	-
Don’t know	-	-

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. D5f. Which of the following best describes your ownership arrangement of your business’s [insert technology] – do you [read out codes]?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Use / uptake of smart meters

A digital interval meter, also known as a 'smart meter'

- Victorian businesses are significantly more likely than average to already be utilising smart meters.
- Businesses in South East QLD are significantly more likely than average to indicate they 'probably won't' be utilising smart meters in the next two years, and Tasmanian businesses are significantly more likely to indicate they 'definitely won't' be utilising smart meters in the next two years.

	2018	2017
Already have	28%	31%
Definitely will	3%	4%
Probably will	7%	10%
Might	18%↓	25%
Probably won't	12%	16%
Definitely won't	32%↑	15%

→

	2018 (n=67)	2017 (n=104)
Own it outright	35%	40%
Own it with a loan purchase	0%	4%
Lease it	19%	11%
Something else	7%	9%
Don't know	38%	37%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. D5f. Which of the following best describes your ownership arrangement of your business's [insert technology] – do you [read out codes]?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Use / uptake of energy management systems

An energy management system or provider which automatically controls your heating or cooling thermostat and appliances according to your settings

- Businesses in South East QLD and those in the Construction industry are significantly more likely than average to indicate they 'probably won't' be utilising energy management systems in the next two years. Tasmanian businesses are significantly more likely than average to indicate they 'definitely won't' be using such a system in the next two years.
- Non-employing businesses are significantly more likely than average to indicate they 'definitely will' be utilising an energy management system in the next two years.
- Larger businesses are significantly less likely than average to indicate they 'definitely won't' be utilising an energy management system in the next two years.

	2018	2017
Already have	6%	4%
Definitely will	3%	3%
Probably will	4% ↓	9%
Might	6% ↓	27%
Probably won't	25% ↓	36%
Definitely won't	57% ↑	21%

	2018 (n=16)	2017 (n=16)
Own it outright	-	-
Own it with a loan purchase	-	-
Lease it	-	-
Something else	-	-
Don't know	-	-

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. D5f. Which of the following best describes your ownership arrangement of your business's [insert technology] – do you [read out codes]?
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Use / uptake of apps to remotely control appliances

An app that allows you to remotely control / adjust your appliances via your mobile phone

- Businesses in the 'Agriculture, Forestry and Fishing' industry are significantly more likely than average to indicate they 'definitely will' utilise apps to control remote appliances in the next two years.

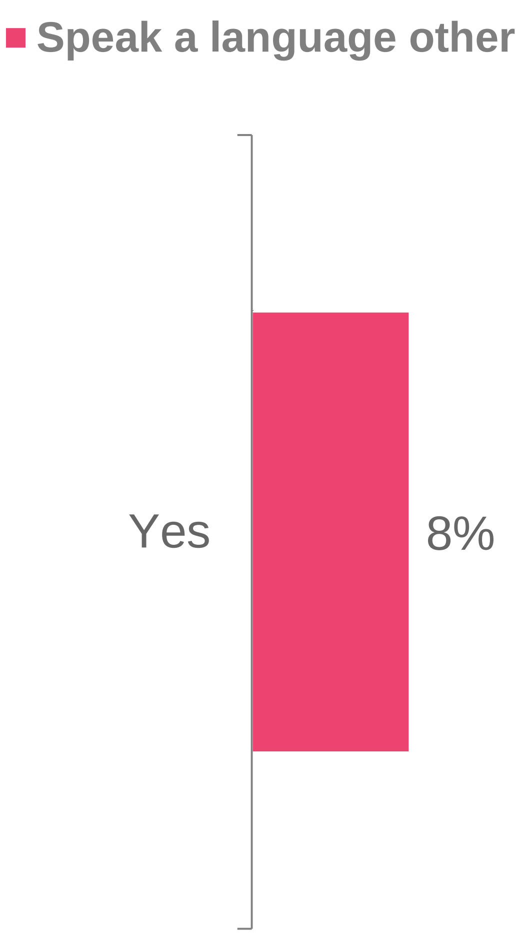
	2018	2017
Already have	1%	2%
Definitely will	1%	2%
Probably will	9%	12%
Might	7% ↓	24%
Probably won't	20% ↓	35%
Definitely won't	61% ↑	25%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years.
Base: All NEM participants: 2017 (n=450); 2018 (n=327).

Language barriers

Language barriers (new questions in 2018)

- Some 8% of business operators identified that they speak a language other than English at home.
- Of these, 5% said they had experienced difficulty understanding their bill due to language issues, while a further 12% said that language was a barrier in considering an alternate energy company, plan or contract.
- No significant differences in language barriers observed by business size, location and industry type.



Experienced language barriers in terms of…

% Yes	(n=33)
Understanding your energy bill	5%
Considering an alternative energy company, plan or contract	12%
Considering investing in energy management or generation technology	0%

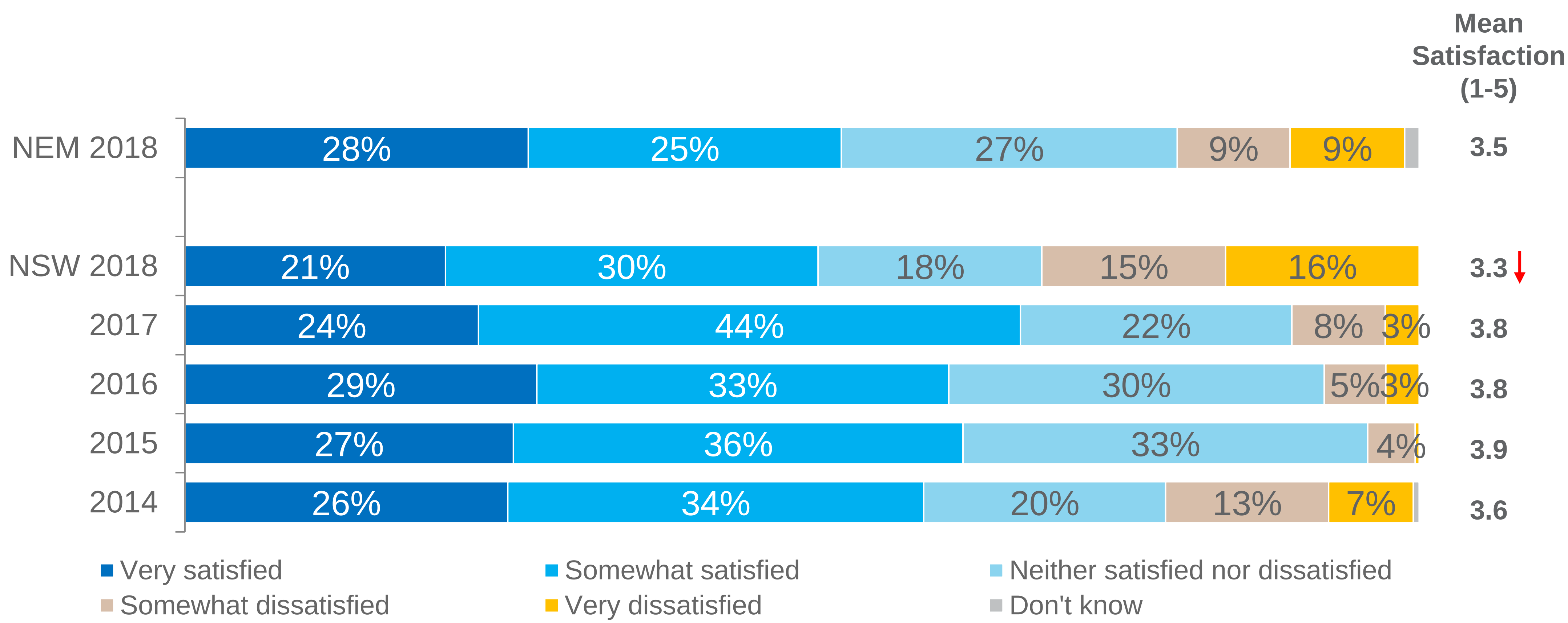
D31. Do you speak a language other than English at home? D33. Have you experienced any language barriers that have negatively impacted on your ability to…
Base: All NEM participants (n=327). NEM participants who speak a language other than English at home (n=33).

Chapter 1B – Time series comparisons (State & territory level)

New South Wales

Overall satisfaction with current electricity provider

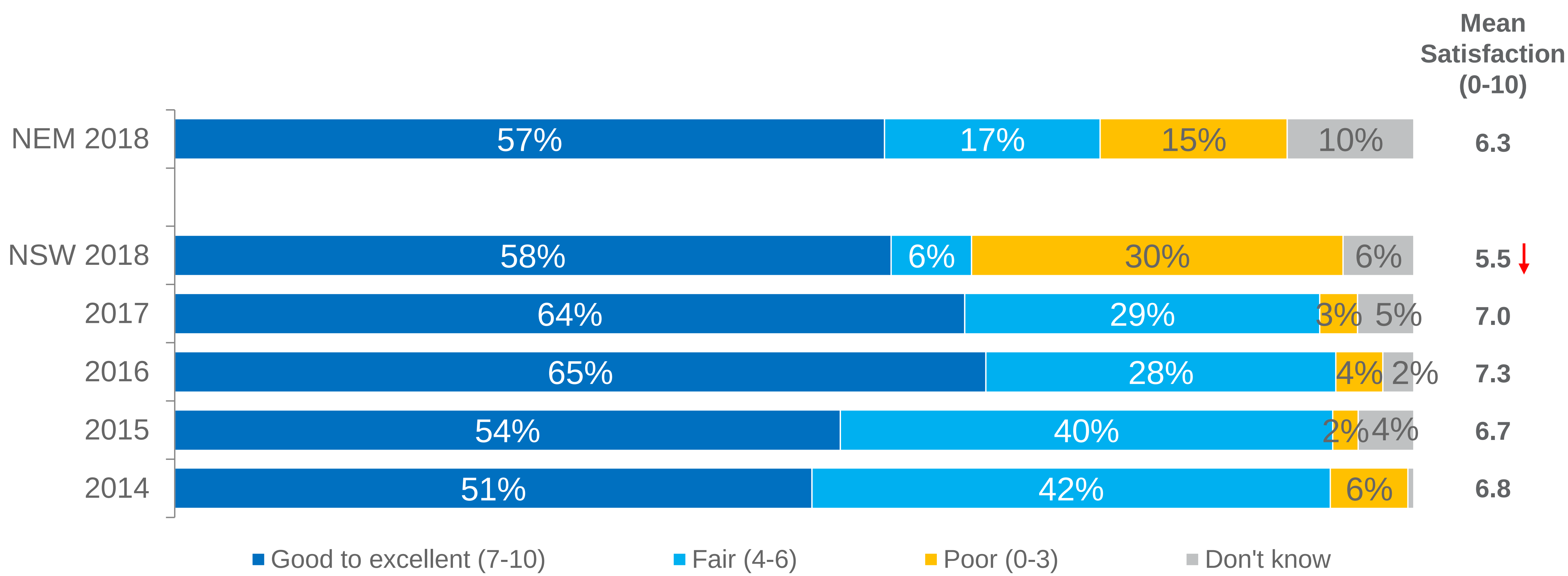
- NSW businesses in 2018 recorded a significantly lower mean satisfaction with their current electricity provider compared to NSW business in 2017 (3.8 in 2017 to 3.3 in 2018).
- The 3.3 mean satisfaction recorded in 2018 is the lowest for NSW businesses since the study commenced in 2014.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

Satisfaction with customer service among electricity providers

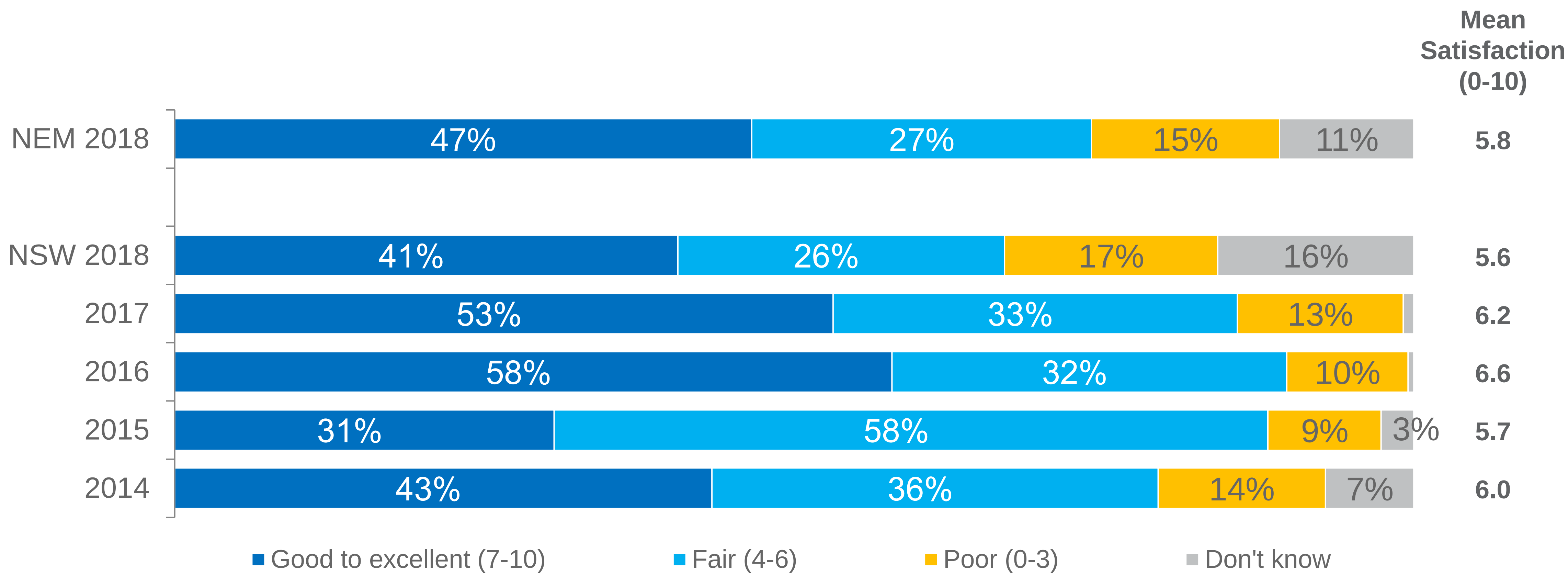
- Average satisfaction with customer service was significantly lower among NSW businesses in 2018 (7.0 in 2017 to 5.5 in 2018).



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

Value for money among electricity providers

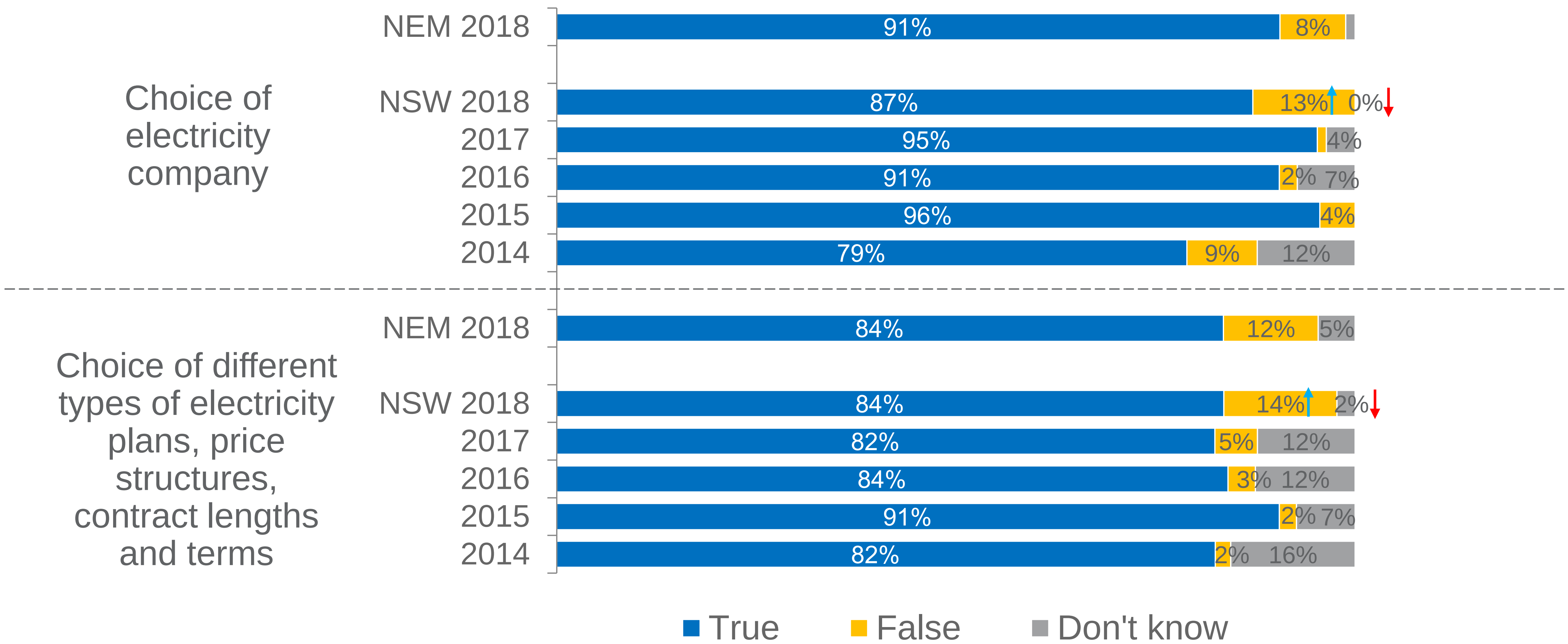
- Perceptions of value for money have declined from a mean of 6.2 in 2017 to 5.6 in 2018, however no significant differences were observed.
- Curiously, 16% of NSW businesses in 2018 did not know how to rate their electricity provider's value for money.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

Perceptions of choice – electricity market

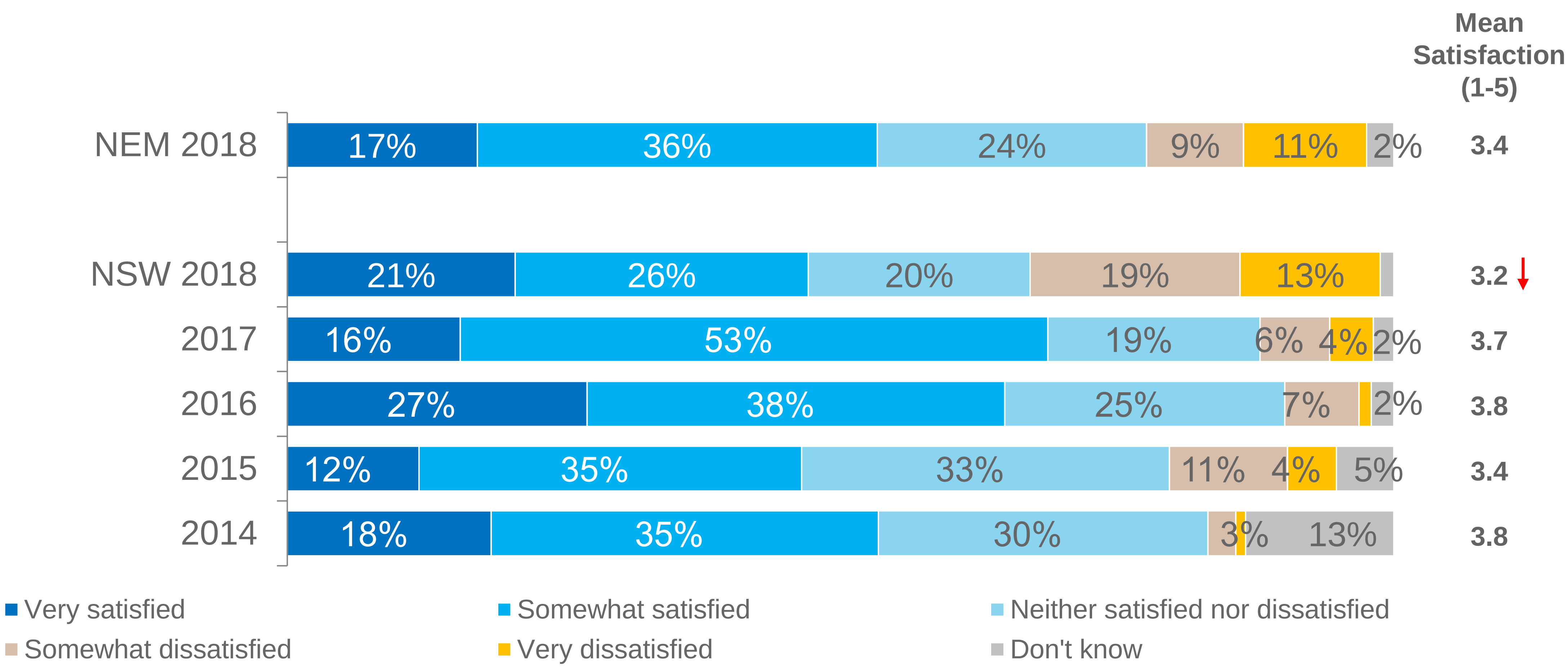
- NSW businesses in 2018 were significantly more likely to state that they do not have a choice of electricity company (1% in 2017 to 13% in 2018).
- There was also a significant increase in the proportion of NSW businesses who reported not having a choice of different electricity plans (5% in 2017 to 14% in 2018), with a corresponding significant decrease to the proportion of NSW businesses that answered ‘don’t know’ (12% in 2017, 2% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

Satisfaction with choice of energy companies and plans

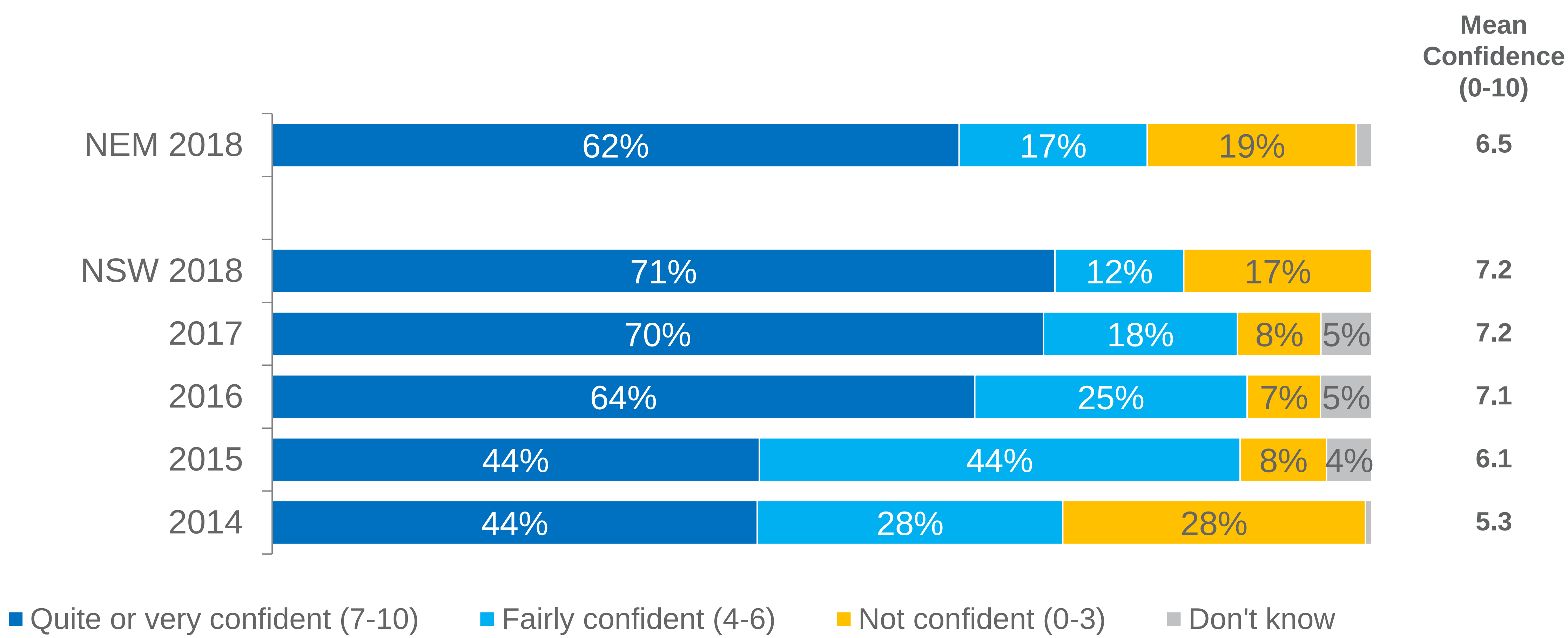
- Average satisfaction with the choice of energy companies and plans decreased significantly in 2018 among NSW businesses (3.7 in 2017 to 3.2 in 2018).



Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

Confidence in finding the right information

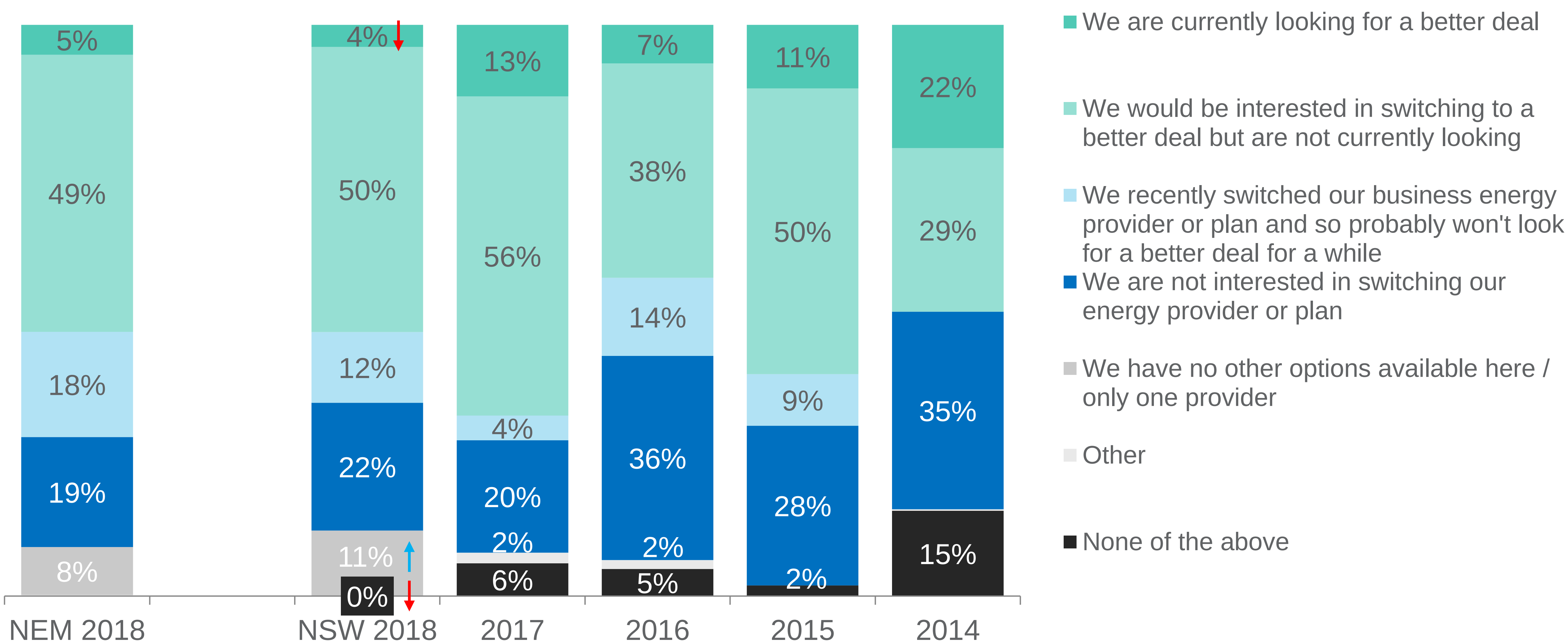
- The level of confidence among NSW businesses to find the right information to help choose an energy plan stayed consistent with previous years (7.2 in both 2017 and 2018), however this result was higher than the NEM 2018 average of 6.5.



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

Intentions to switch in the future

- A significantly lower proportion of NSW businesses in 2018 reported that they were currently looking for a better deal (4% in 2018 compared to 13% in 2017).
- There was a significant increase in the number of NSW businesses reporting that they have no other options available here/only one provider (11% in 2018 compared to 0% in 2017).

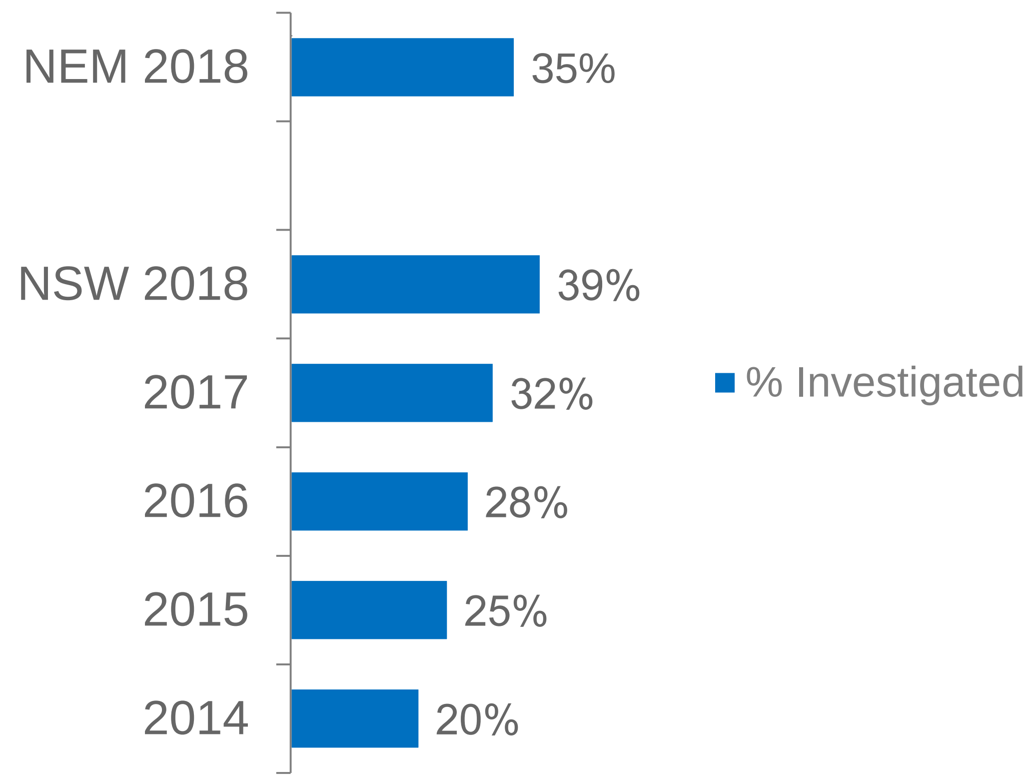


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77)

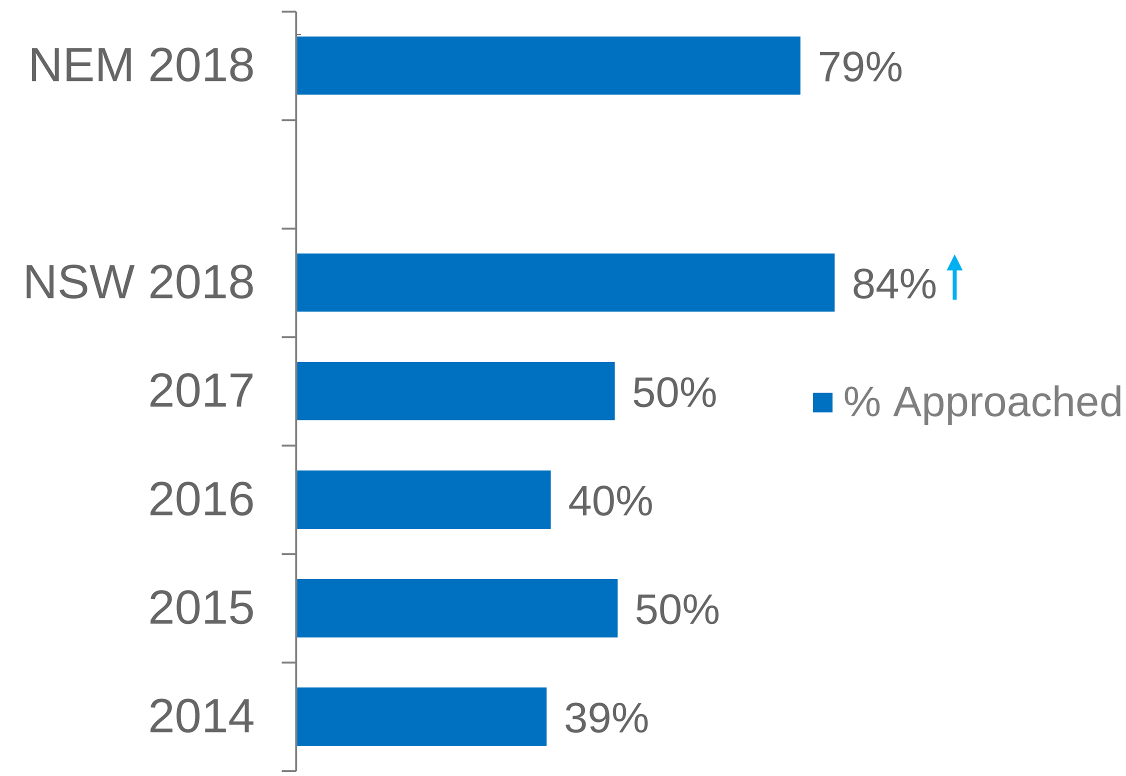
Interaction with alternative energy options / retailers

- The number of NSW businesses who have actively investigated energy options in the last 12 months has steadily increased in the last five years from 20% in 2014 to 39% in 2018.
- The number of NSW businesses reporting that they have been approached by an alternative energy retailer in the last 12 months increased significantly in 2018 (84%, up from 50% in 2017).

Actively investigated different energy options in past 12 months



Approached by alternative energy retailer in last 12 months

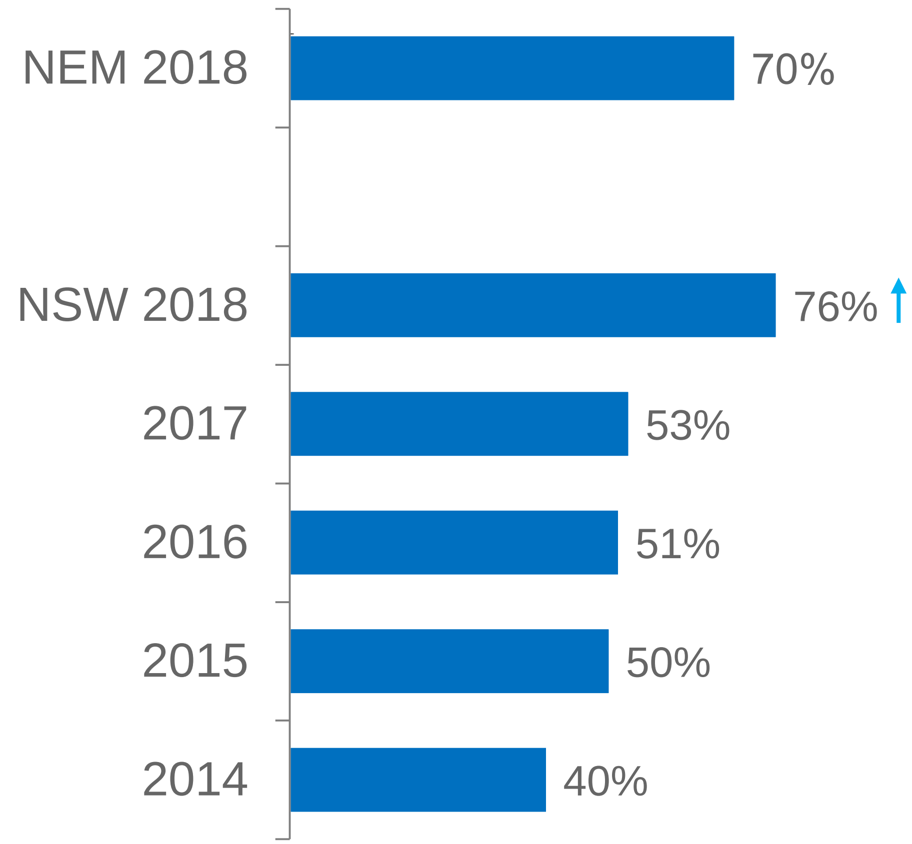


Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101);

Rates of switching in the last 5 years

- NSW businesses in 2018 were significantly more likely to report that they have switched either their electricity/gas provider or plan in the last 5 years (76%, up from 53% in 2017).

Switched anything (gas / electricity company or plan) in the last 5 years.

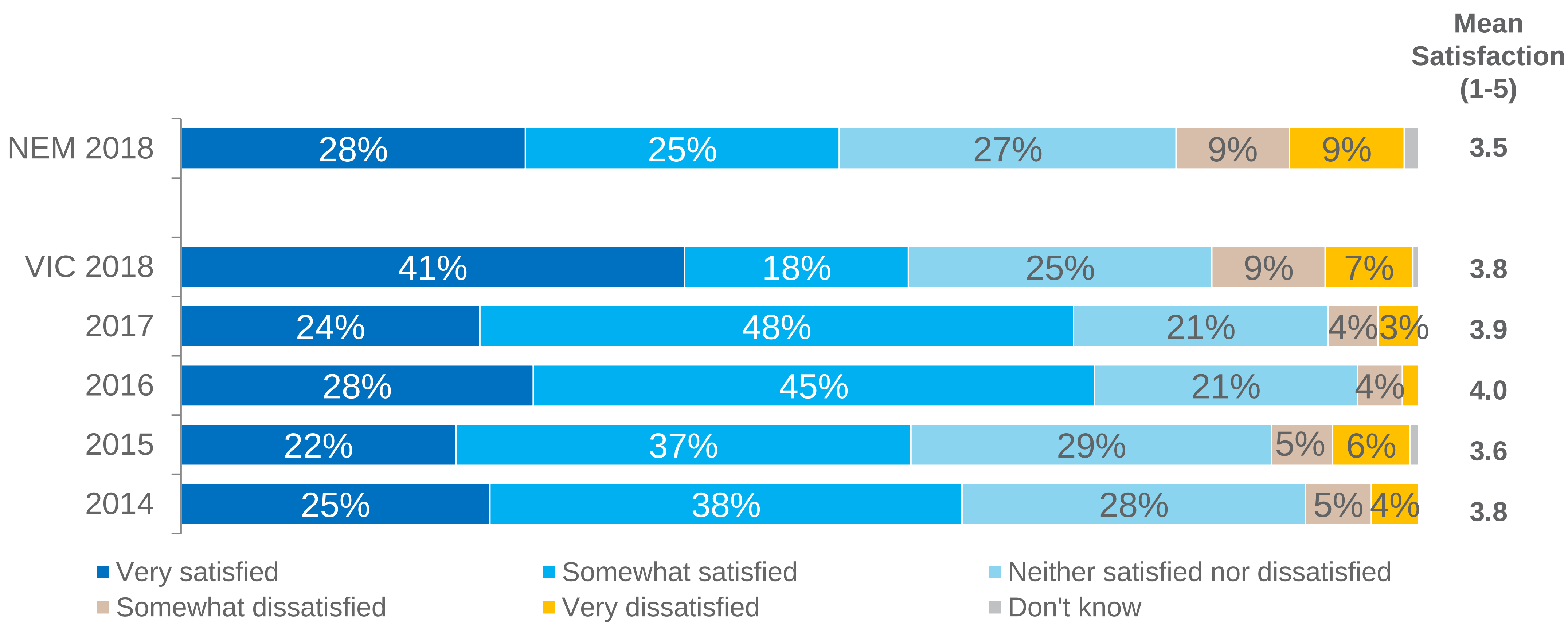


Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=76)

Victoria

Overall satisfaction with current electricity provider

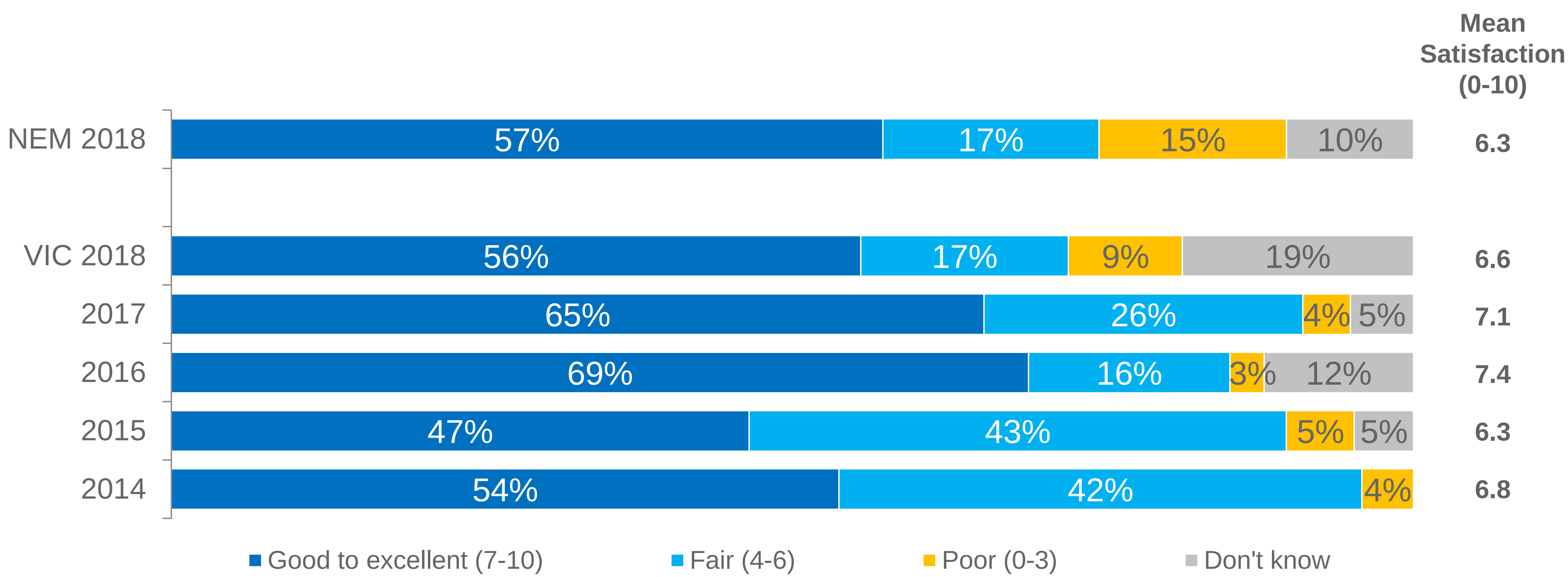
- VIC businesses in 2018 recorded similar levels of average satisfaction to previous years with no significant differences observed.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

Satisfaction with customer service among electricity providers

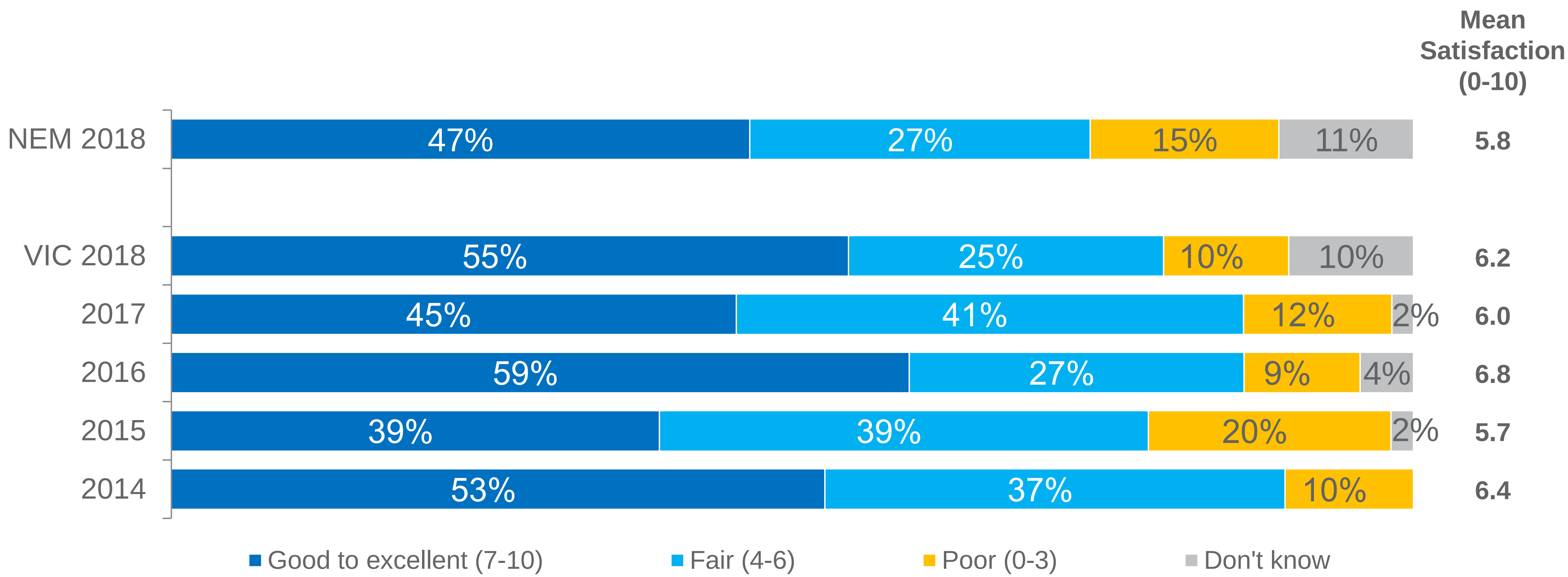
- Among VIC businesses, average satisfaction with the quality of customer service decreased from 7.1 in 2017 to 6.6 in 2018, however this difference was not statistically significant.



Q3: How would you rate the overall <u>quality of customer service</u> provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

Value for money among electricity providers

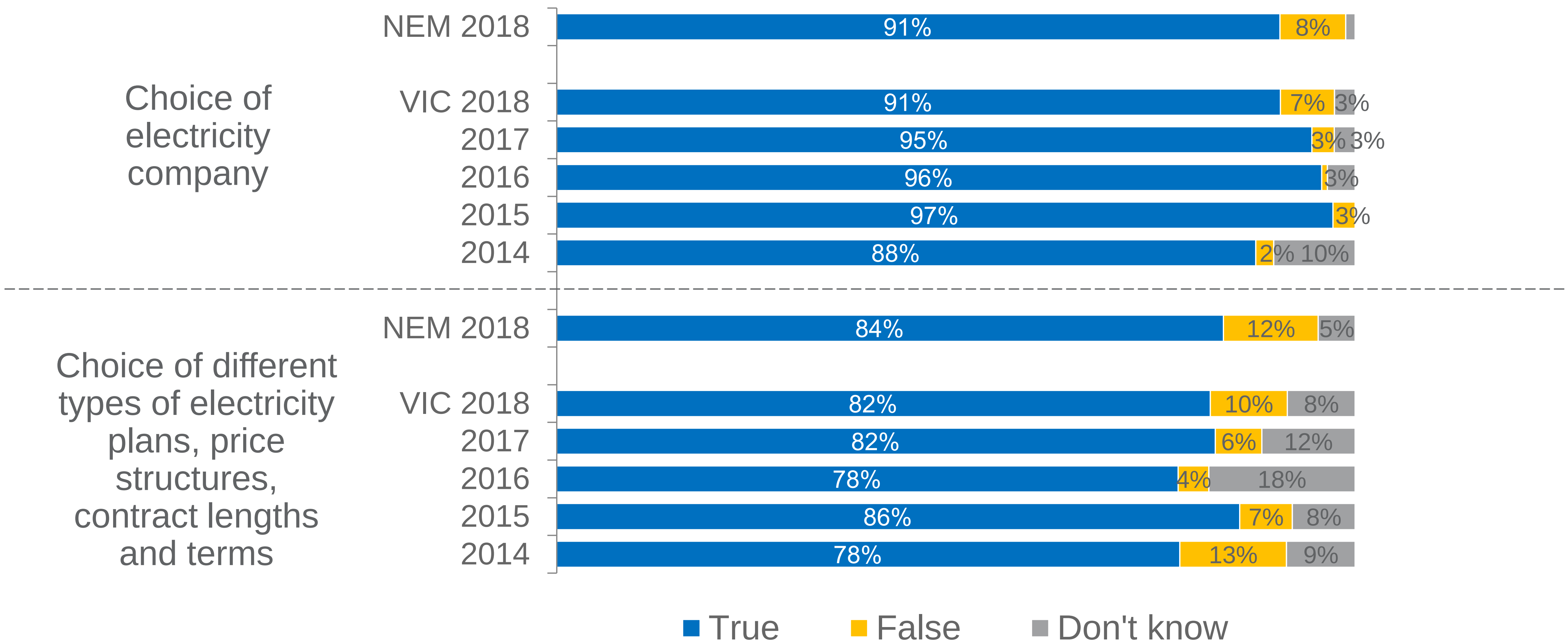
- The perceptions of VIC businesses in 2018 on their electricity provider's value for money was generally consistent with results from previous years (6.2 in 2018, compared to means ranging from 5.7 to 6.8 from 2014-2017).



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

Perceptions of choice – electricity market

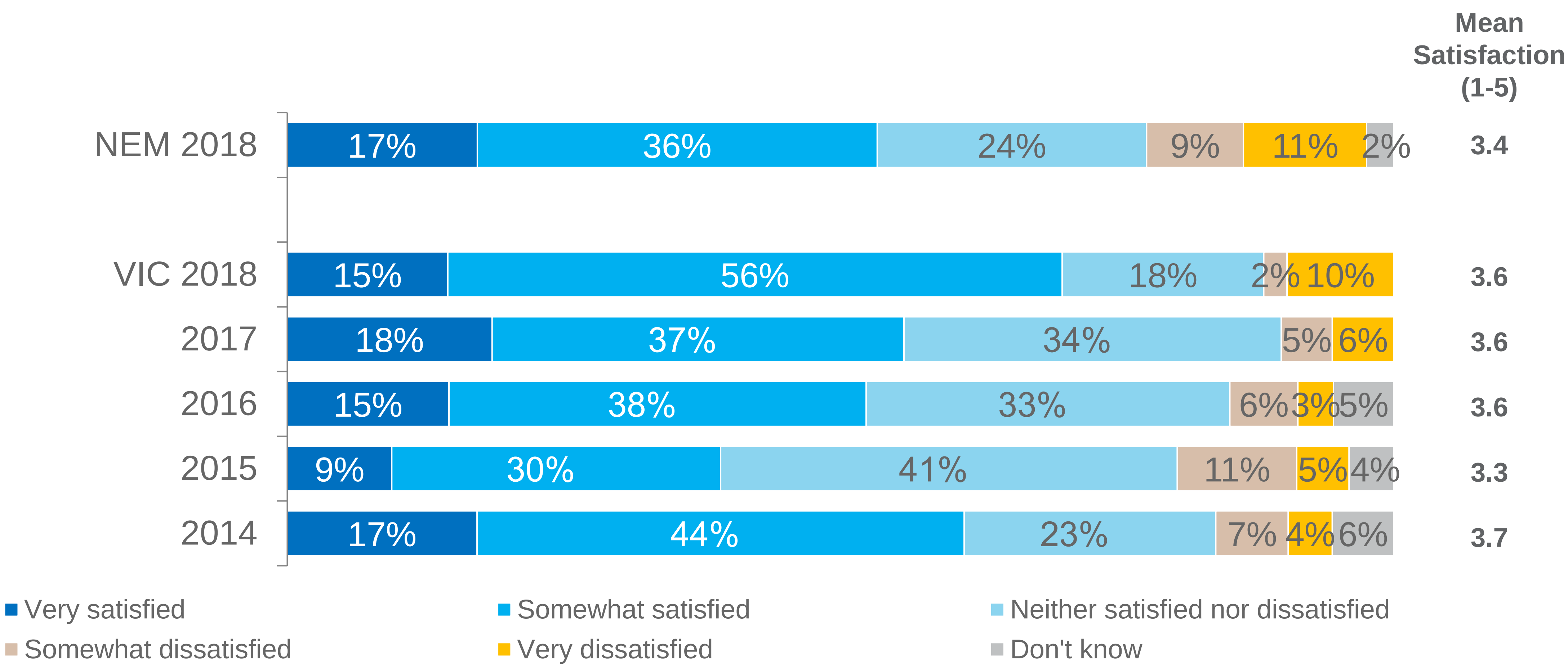
- Although the overwhelming majority (91%) of VIC businesses in 2018 reported that they have a choice of electricity company, 7% believe they have no choice (compared to 1%-3% across 2014-2017).
- Of note, one in ten (10%) VIC businesses in 2018 believe they have no choice of different electricity plans.



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

Satisfaction with choice of energy companies and plans

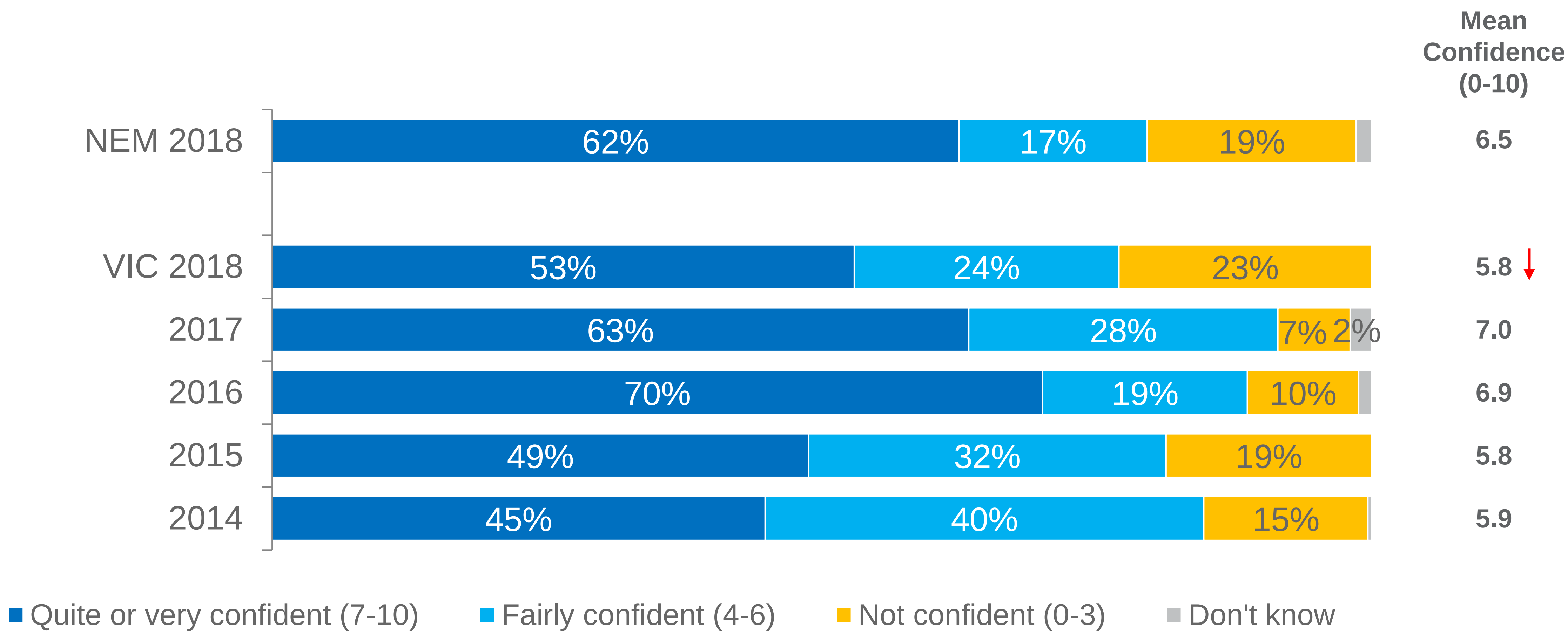
- Average satisfaction with the choice of energy companies has remained consistent among VIC businesses in 2018 (3.6 compared to a mean range of 3.3 to 3.7 across 2014-2017).



Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

Confidence in finding the right information

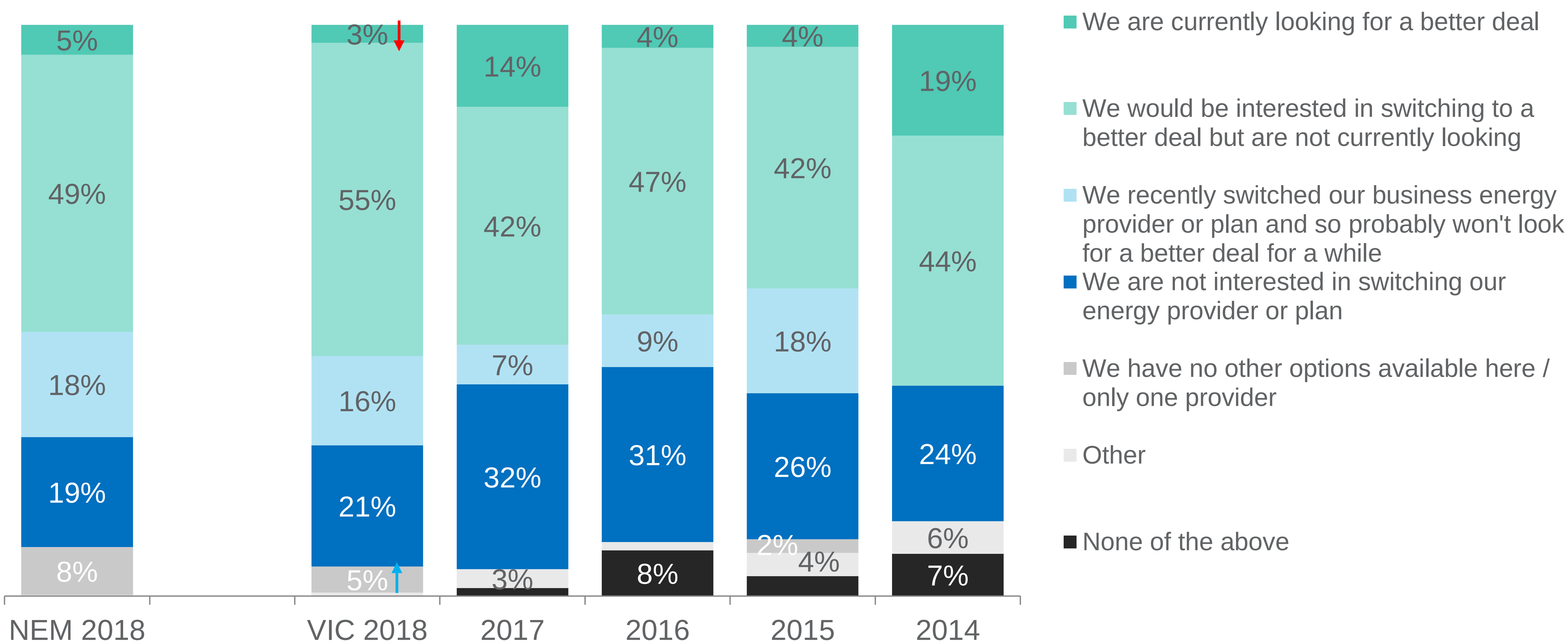
- Among VIC businesses, average self-rated confidence in finding the right information to help choose a suitable energy plan decreased significantly since 2017 (7.0 in 2017 to 5.8 in 2018).



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

Intentions to switch in the future

- There was a significant decline in the number of VIC businesses who reported that they were currently looking for a better deal (3%, down from 14% in 2017), however this result was consistent with 2015 and 2016 results.
- Significantly more VIC businesses in 2018 reported that they have no other options available here/only one provider (5%, up from 0% in 2017).

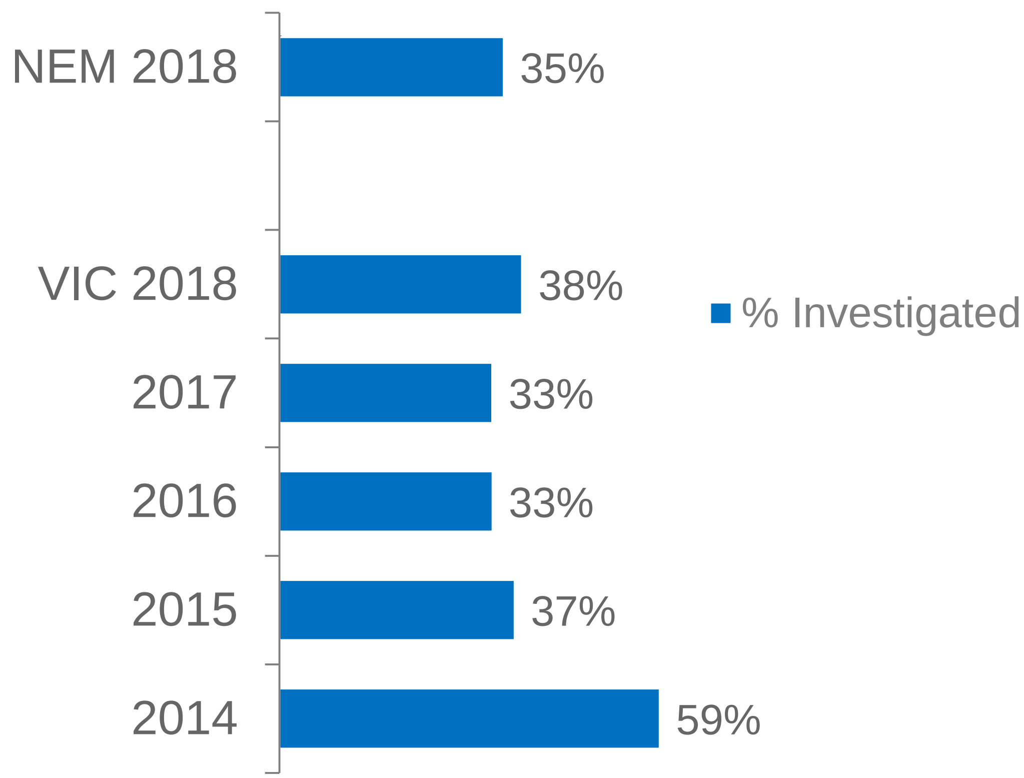


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

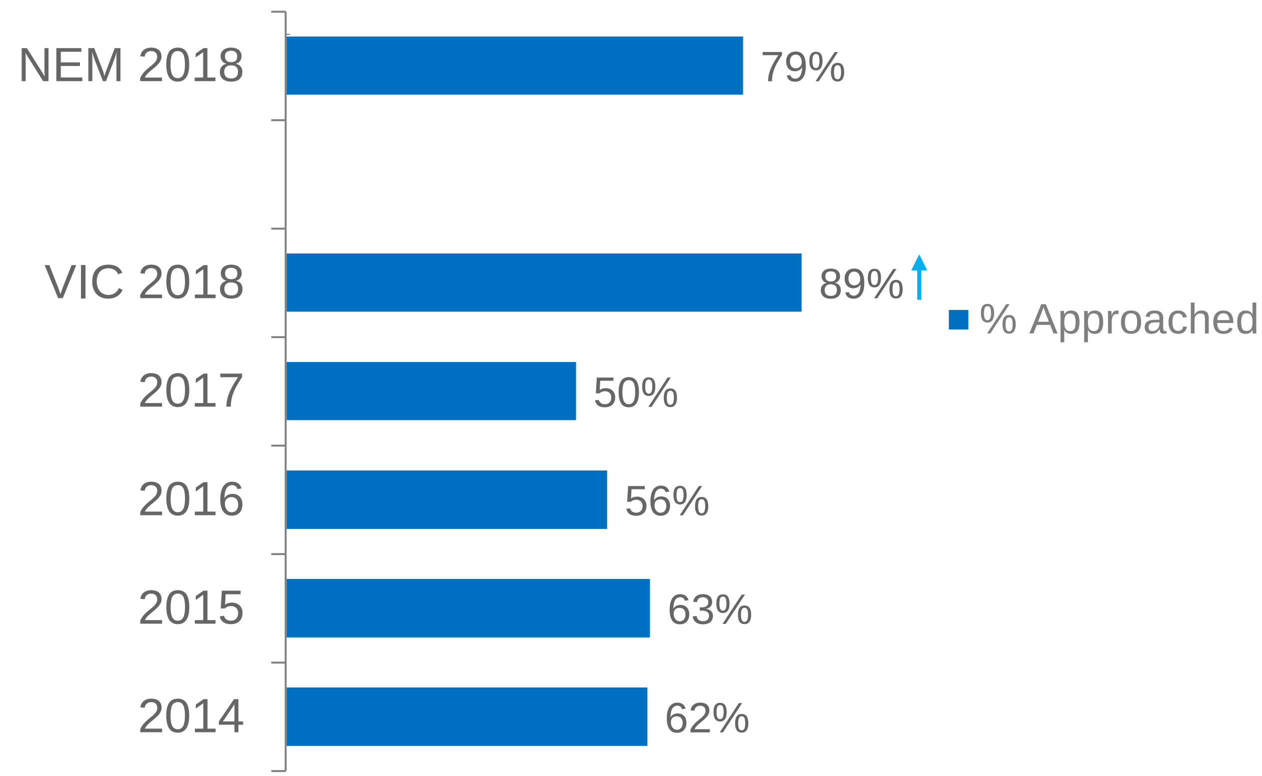
Interaction with alternative energy options / retailers

- VIC businesses in 2018 were slightly more likely to have actively investigated different energy options in the past 12 months (38% in 2018 compared to 33% in 2017).
- VIC businesses in 2018 were significantly more likely to report being approached by an alternative energy retailer in the last 12 months (89% in 2018 compared to 50% in 2017).

Actively investigated different energy options in past 12 months



Approached by alternative energy retailer in last 12 months



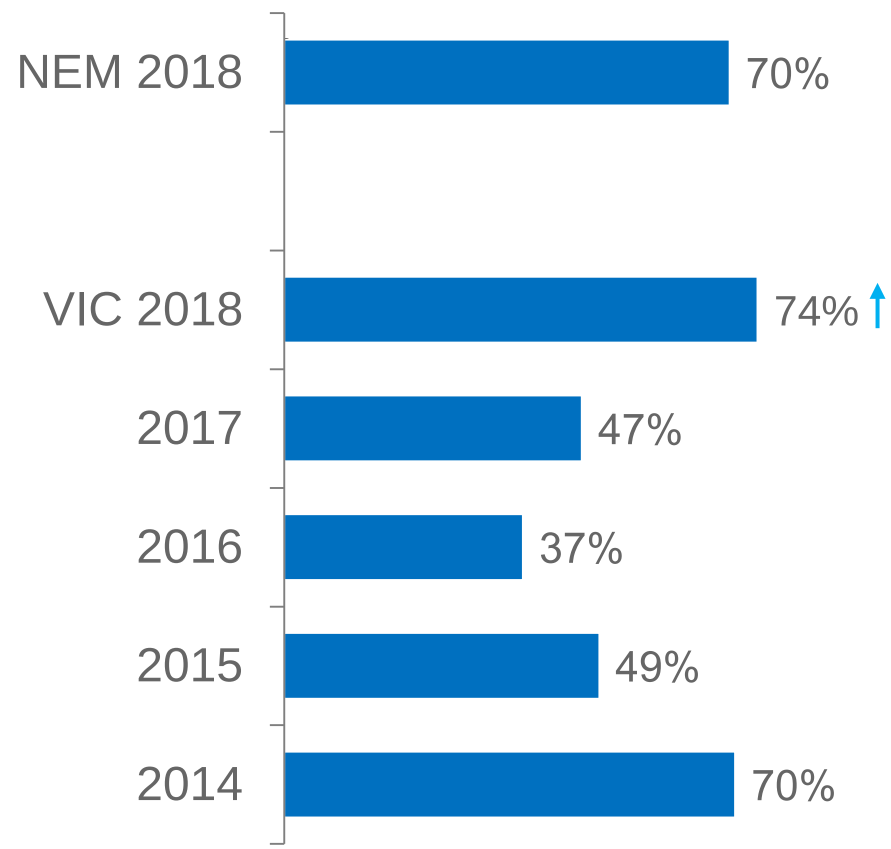
Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants/ECGM participants: 2018 (n=327). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

colmar brunton.

Rates of switching in the last 5 years

- Compared to 2017 results, a significantly higher proportion of VIC businesses in 2018 reported that they have switched either their electricity/gas provider or plan in the past 5 years
- Interestingly, this result is similar to 2014 where 70% of VIC businesses reported switching ‘anything’ in the past 5 years.

Switched anything (gas / electricity company or plan) in the last 5 years.

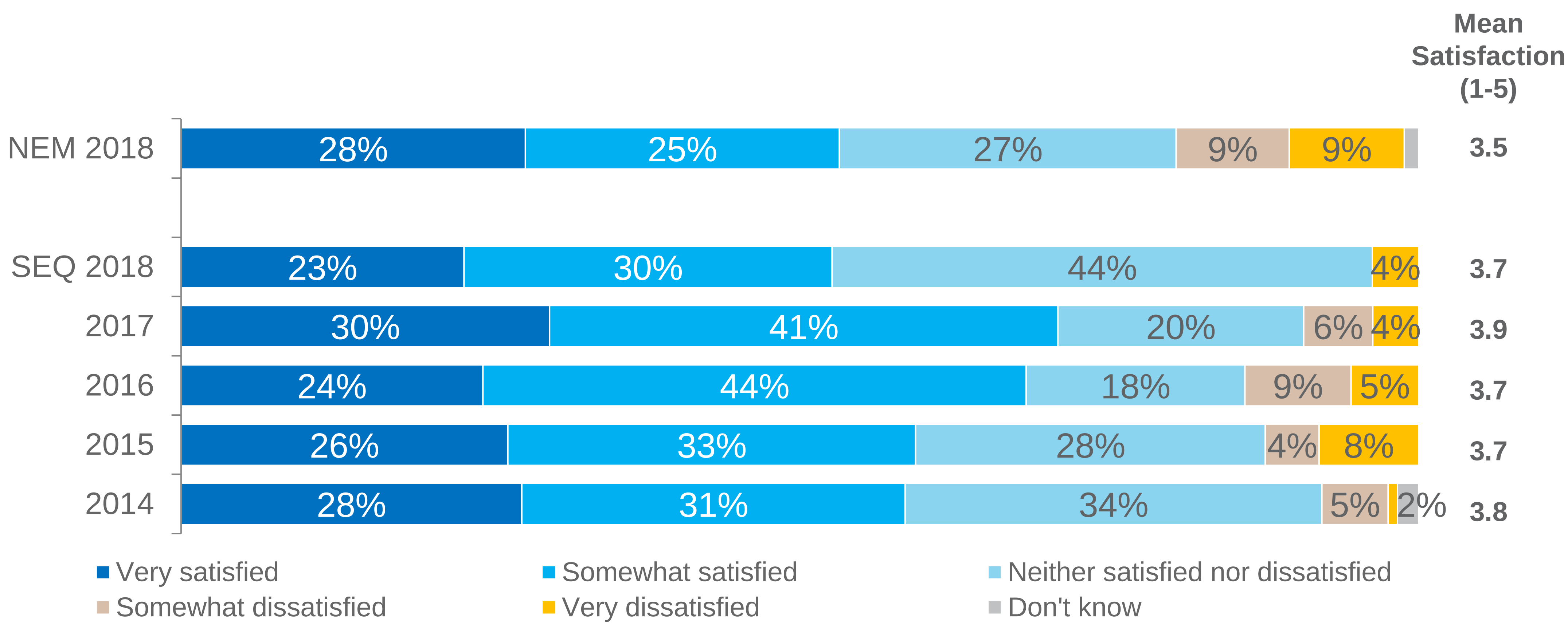


Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74)

South East Queensland

Overall satisfaction with current electricity provider

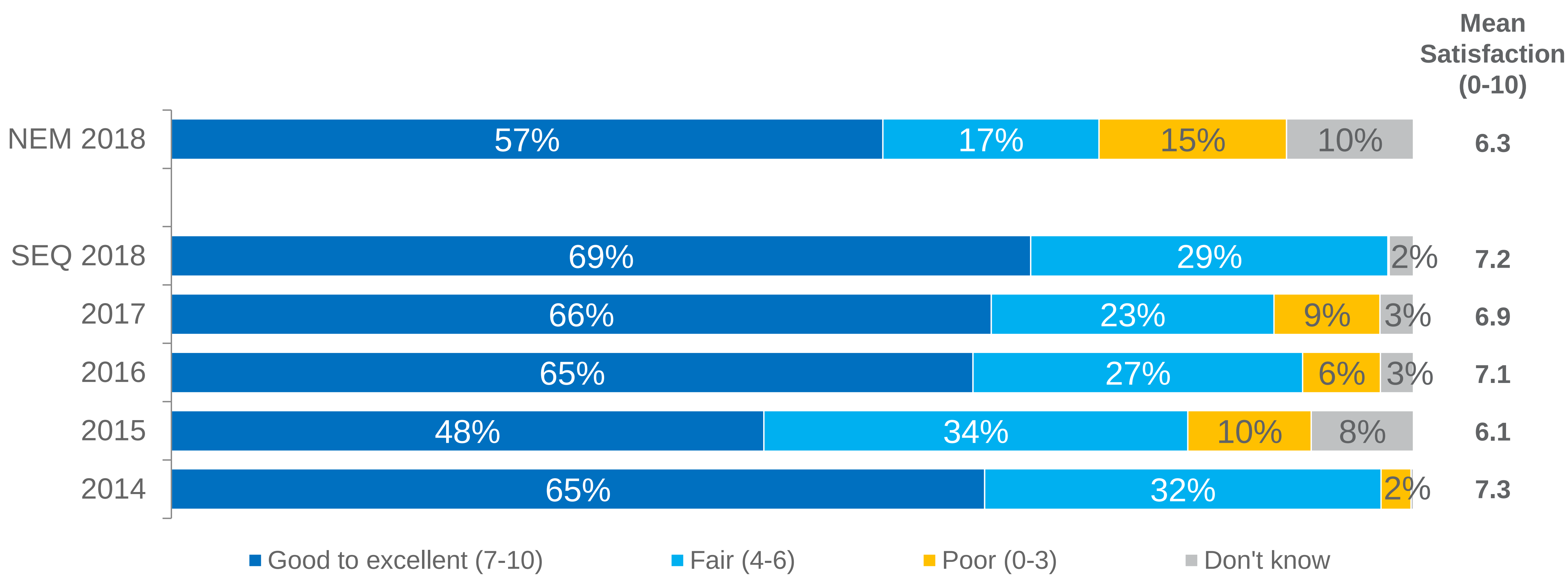
- SEQ businesses in 2018 recorded a similar level of satisfaction with their current electricity provider compared to previous years (3.7 in 2018, compared to a mean range of 3.7-3.9 across 2014-2017).



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

Satisfaction with customer service among electricity providers

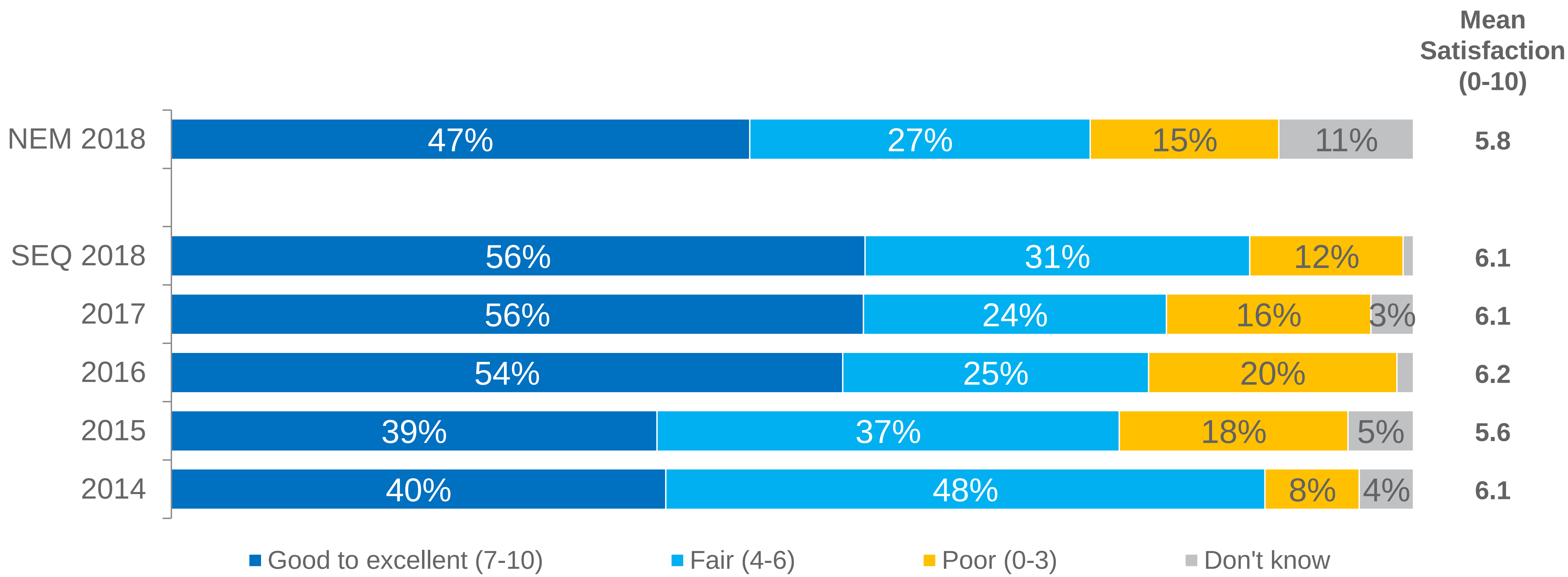
- SEQ business's satisfaction with the quality of customer service from their electricity providers increased slightly in 2018 (7.2, up from 6.9 in 2017).
- Encouragingly, 0% of SEQ businesses in 2018 recorded a poor (0-3) rating.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

Value for money among electricity providers

- Perceptions of value for money among electricity providers remained largely consistent amongst SEQ businesses in 2018, however there was a slight decrease in the proportion that provided a poor (0-3) rating (16% in 2017 down to 12% in 2018).

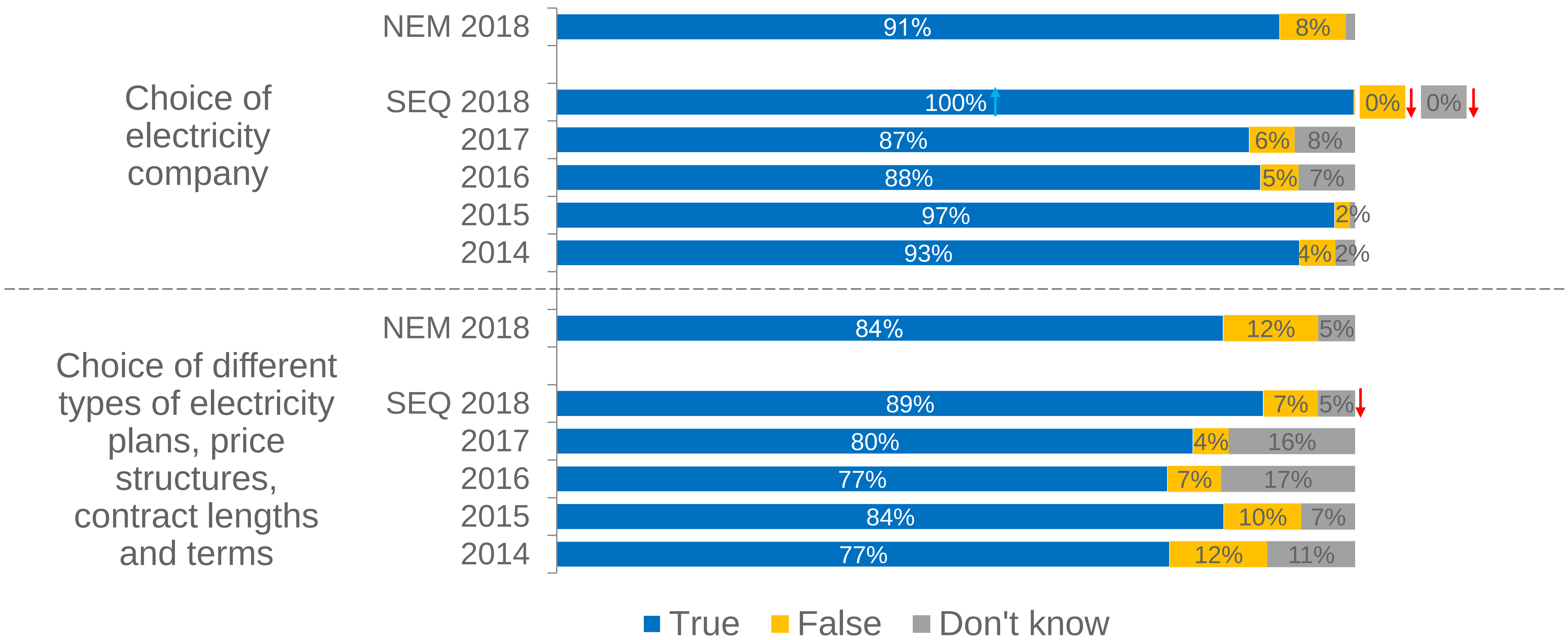


Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

colmar brunton.

Perceptions of choice – electricity market

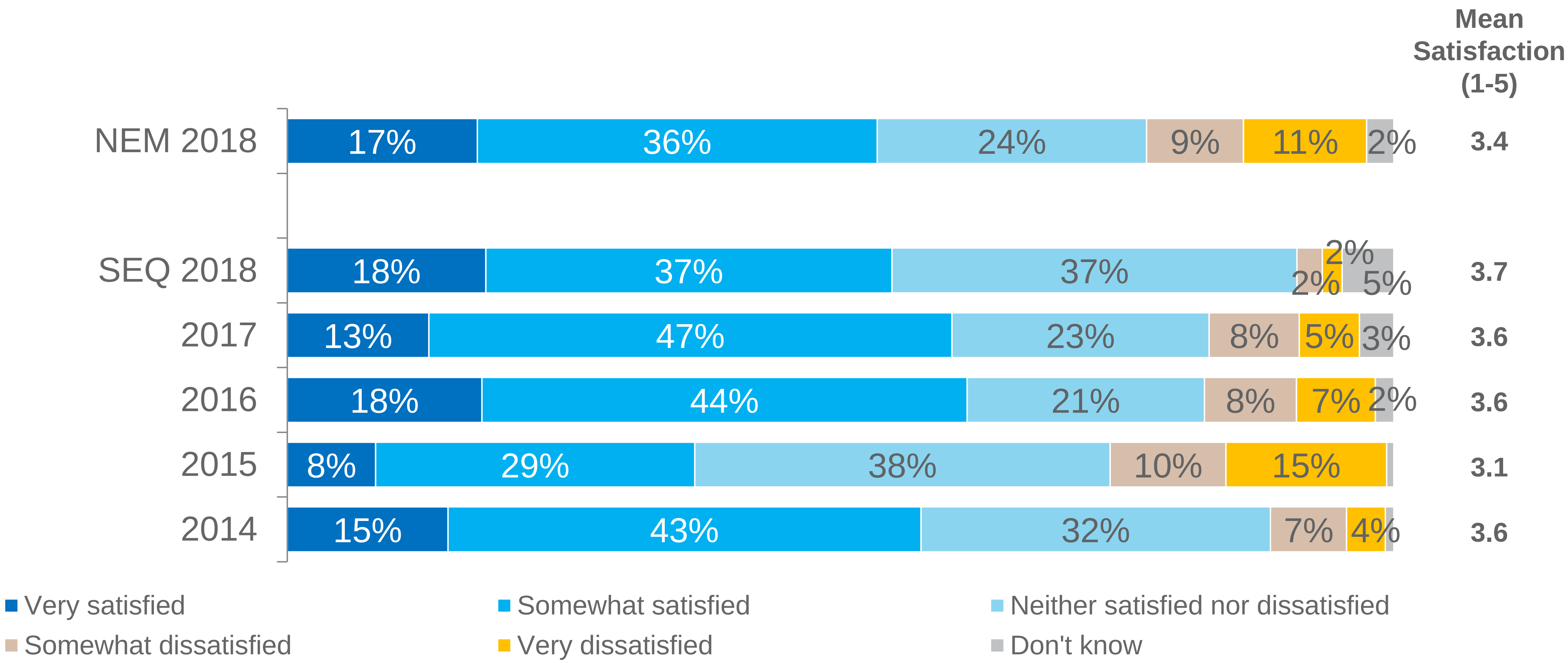
- Out of all SEQ businesses in 2018, only one answered that they do not have a choice of electricity company (which rounds to 0% of all SEQ businesses).
- There was a significant decrease in the proportion of SEQ businesses who answered that they 'don't know' if they have a choice of different types of electricity plans (16% in 2017, down to 5% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

Satisfaction with choice of energy companies and plans

- Average satisfaction with the choice of energy companies and plans increased slightly from a mean of 3.6 in 2017 to 3.7 in 2018.
- Of note, a small minority of SEQ businesses in 2018 were ‘somewhat dissatisfied’ (2%) or ‘very dissatisfied’ (2%).

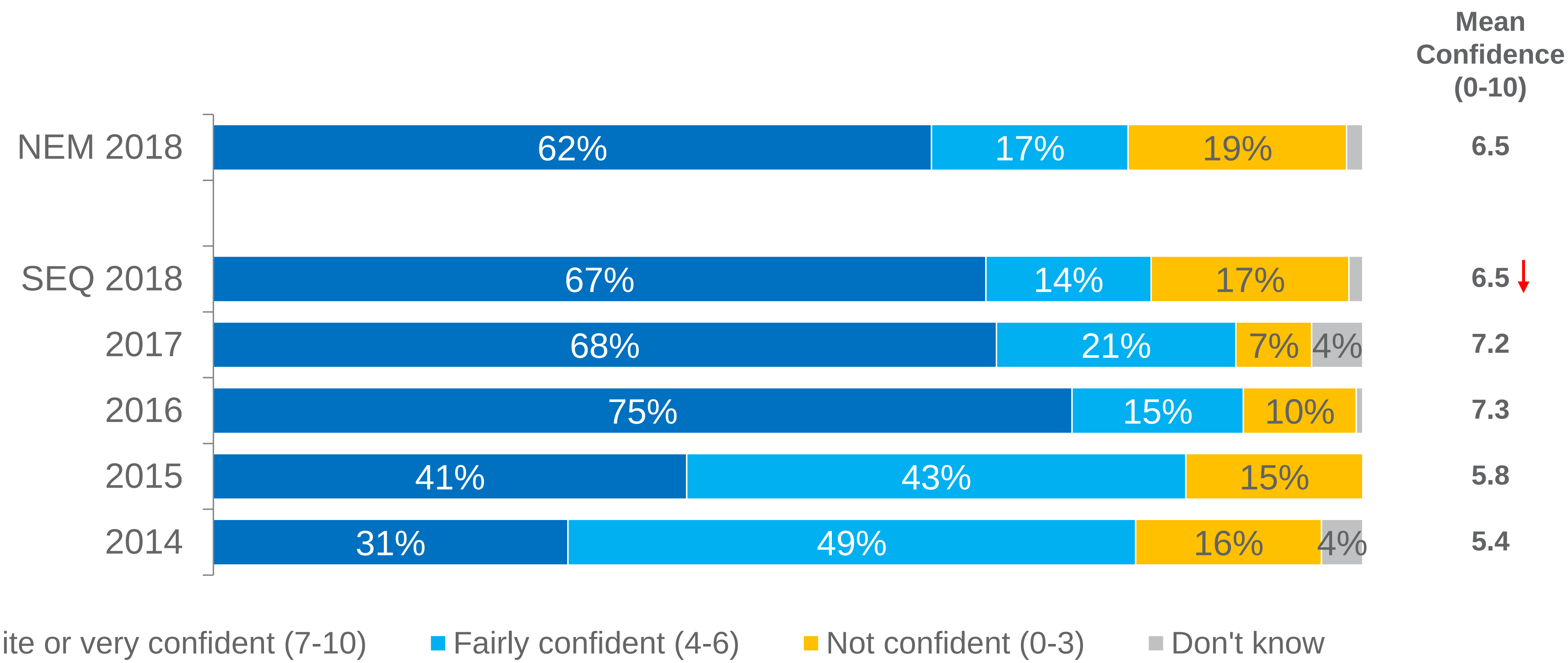


Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?

Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

Confidence in finding the right information

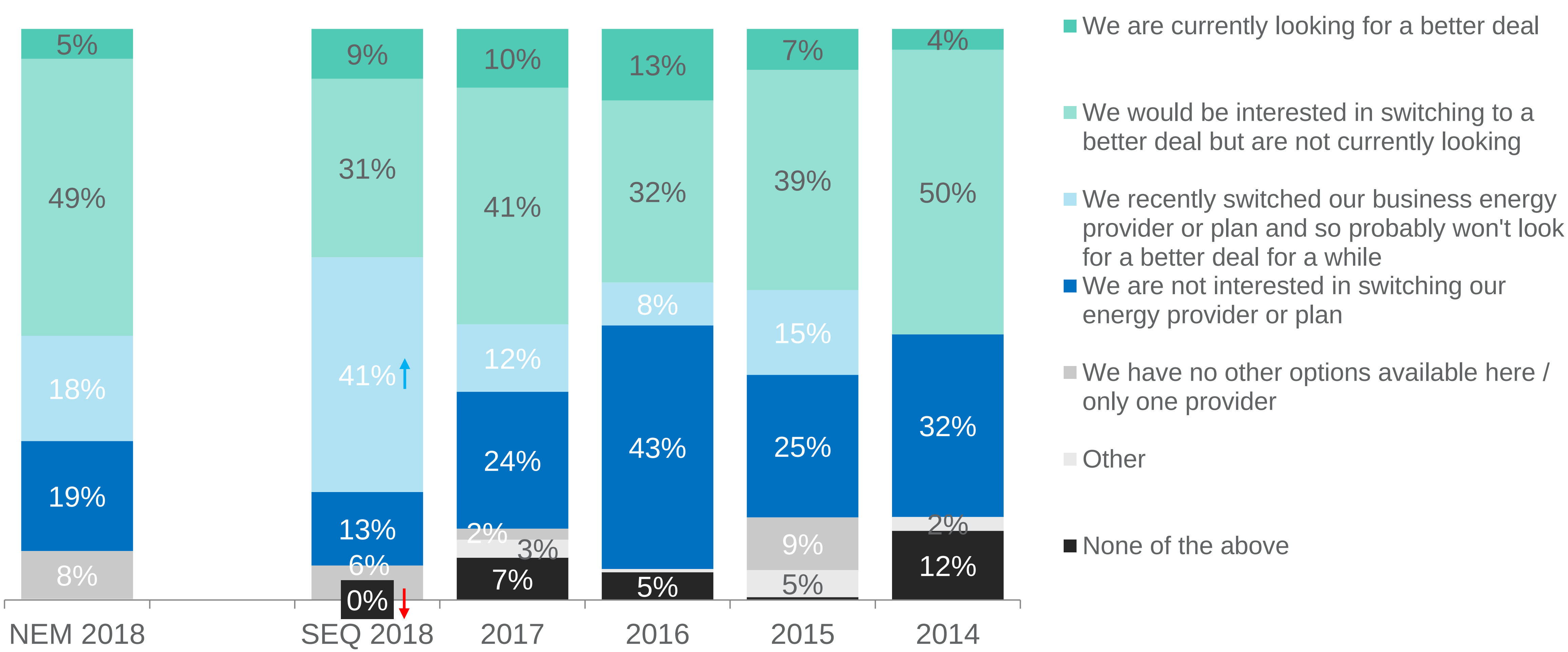
- There was a significant decrease in 2018 amongst SEQ businesses who feel confident in finding the right information to help them choose an energy plan (6.5 in 2018, down from 7.2 in 2017).



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

Intentions to switch in the future

- A significantly higher proportion of SEQ businesses in 2018 answered that they have recently switched their business energy provider or plan so probably will not look for a better deal in a while (41% in 2018, compared to 12% in 2017).

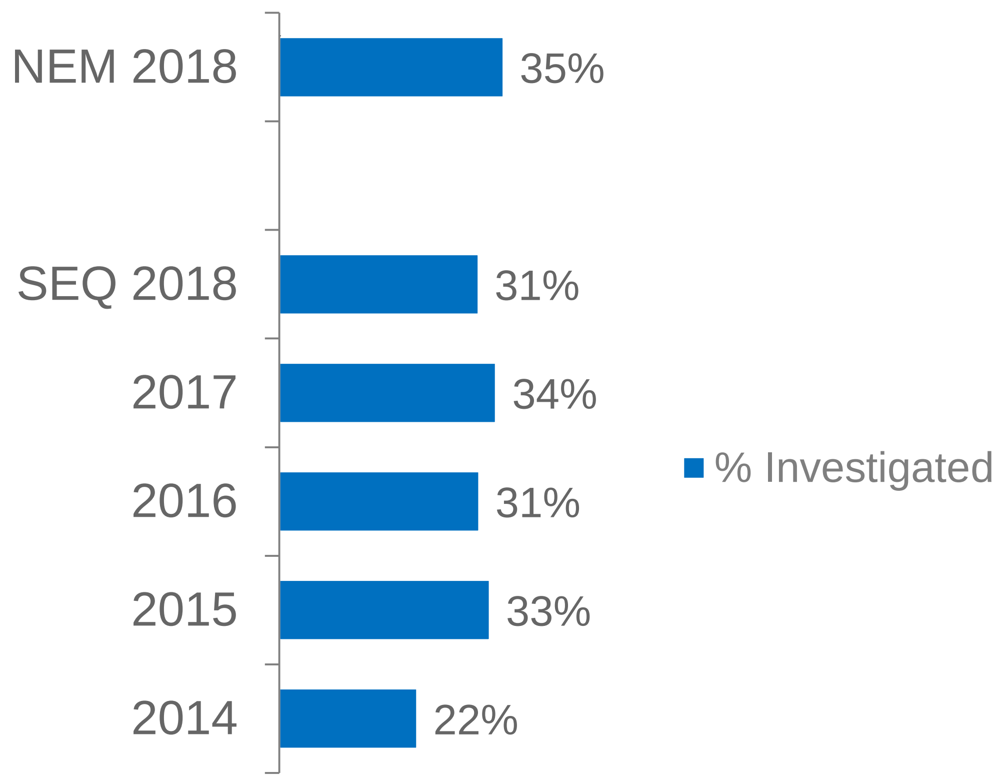


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

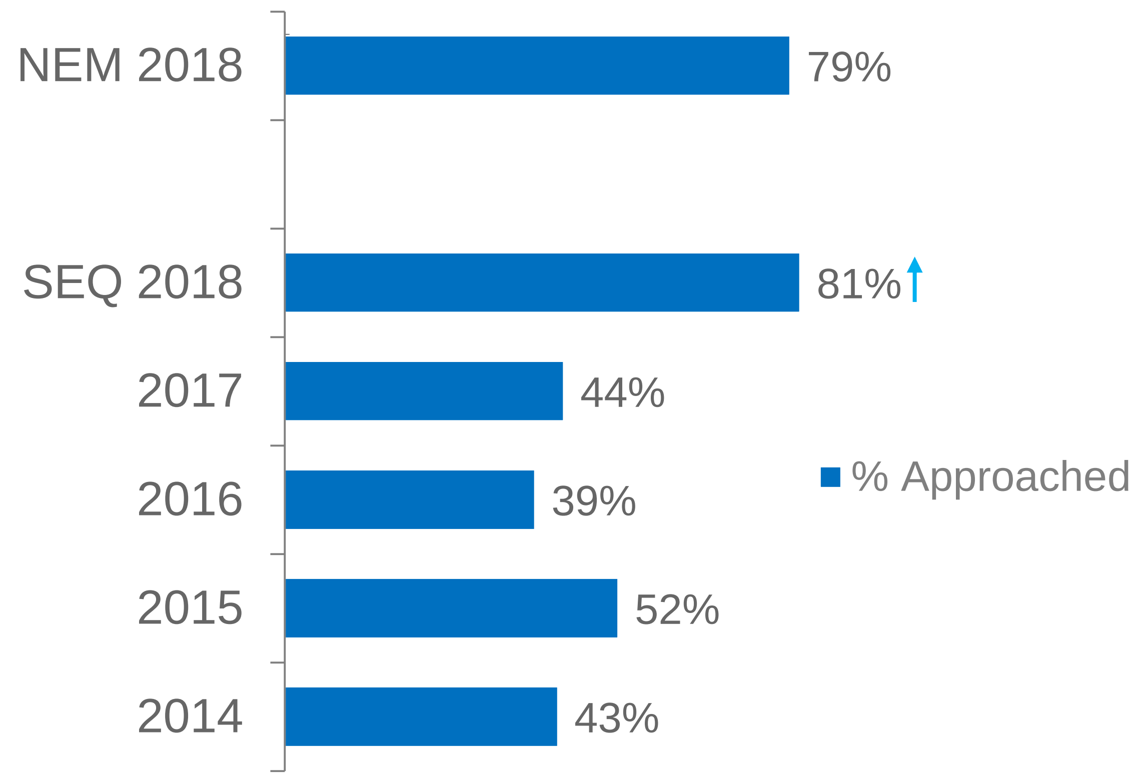
Interaction with alternative energy options / retailers

- Around a third (31%) of SEQ businesses in 2018 actively investigated different energy options in the past 12 months, which is similar to the result in 2017 (34%).
- Around four out of five (81%) SEQ businesses in 2018 reported that they have been approached by an alternative energy retailer in the past 12 months, representing a significant increase from 44% in 2017.

Actively investigated different energy options in past 12 months



Approached by alternative energy retailer in last 12 months

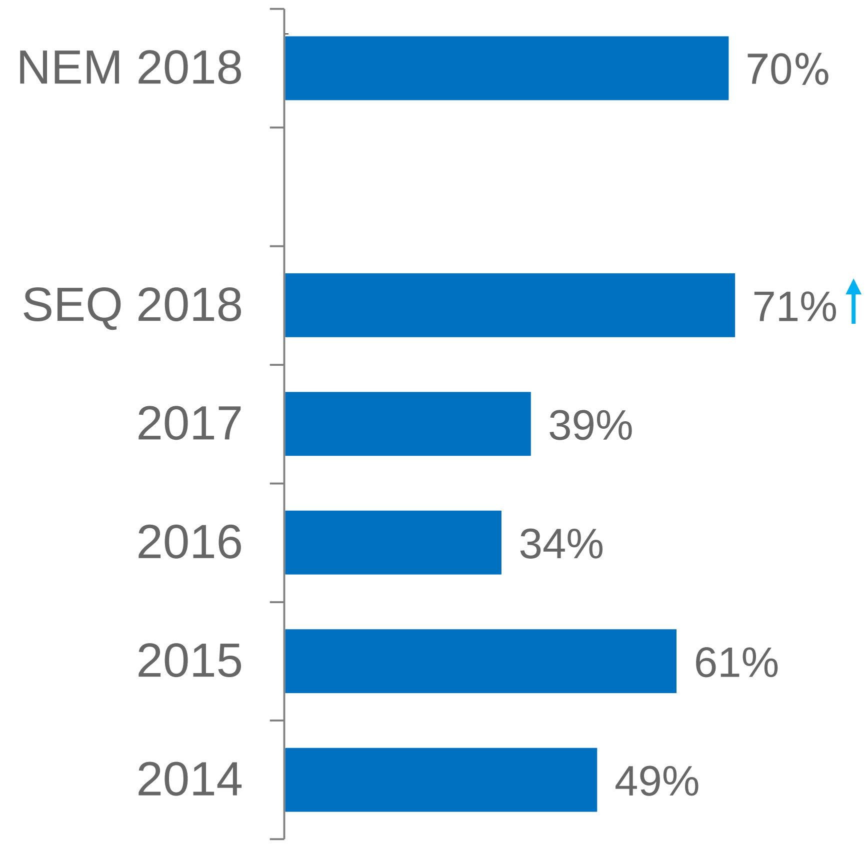


Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants/ECGM participants: 2018 (n=327). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69)

Rates of switching in the last 5 years

- There was a significant increase in SEQ businesses who reported that they have switched either their electricity/gas provider or plan in the past 5 years (71% in 2018, compared to 39% in 2017).

Switched anything (gas / electricity company or plan) in the last 5 years.

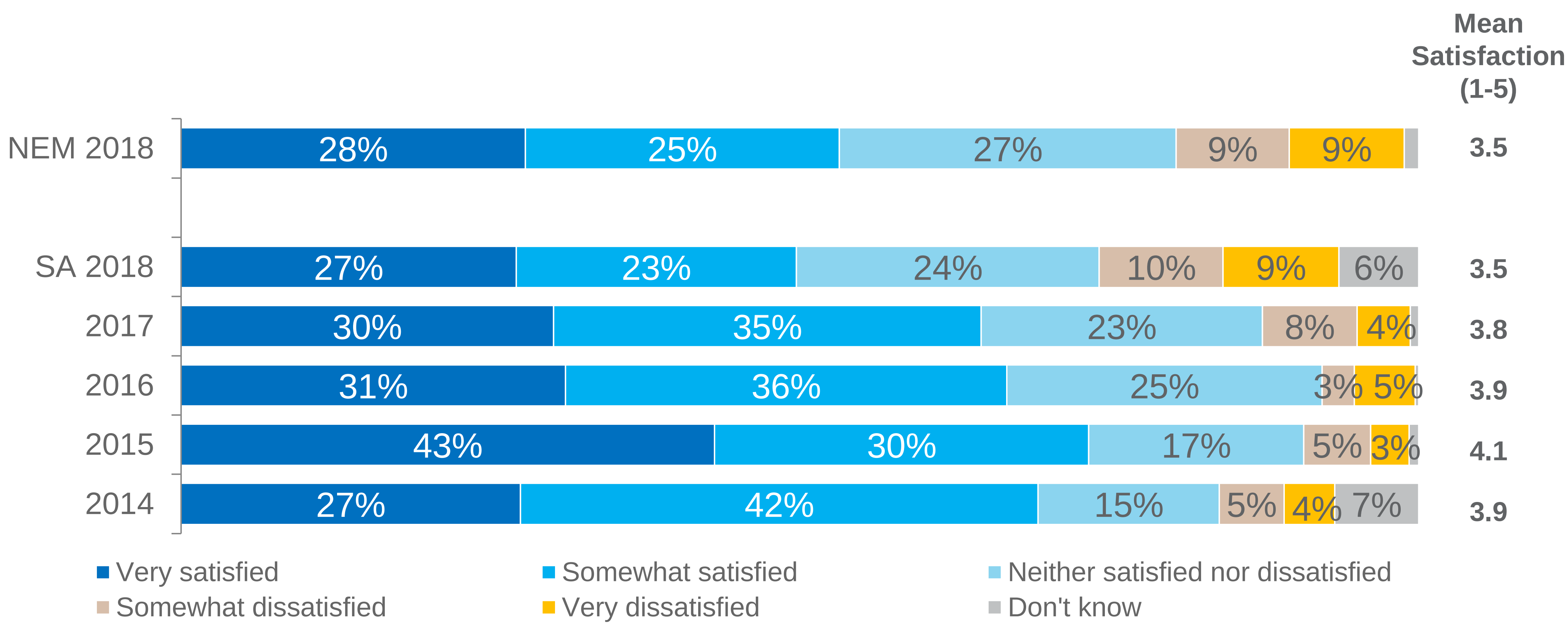


Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69).

South Australia

Overall satisfaction with current electricity provider

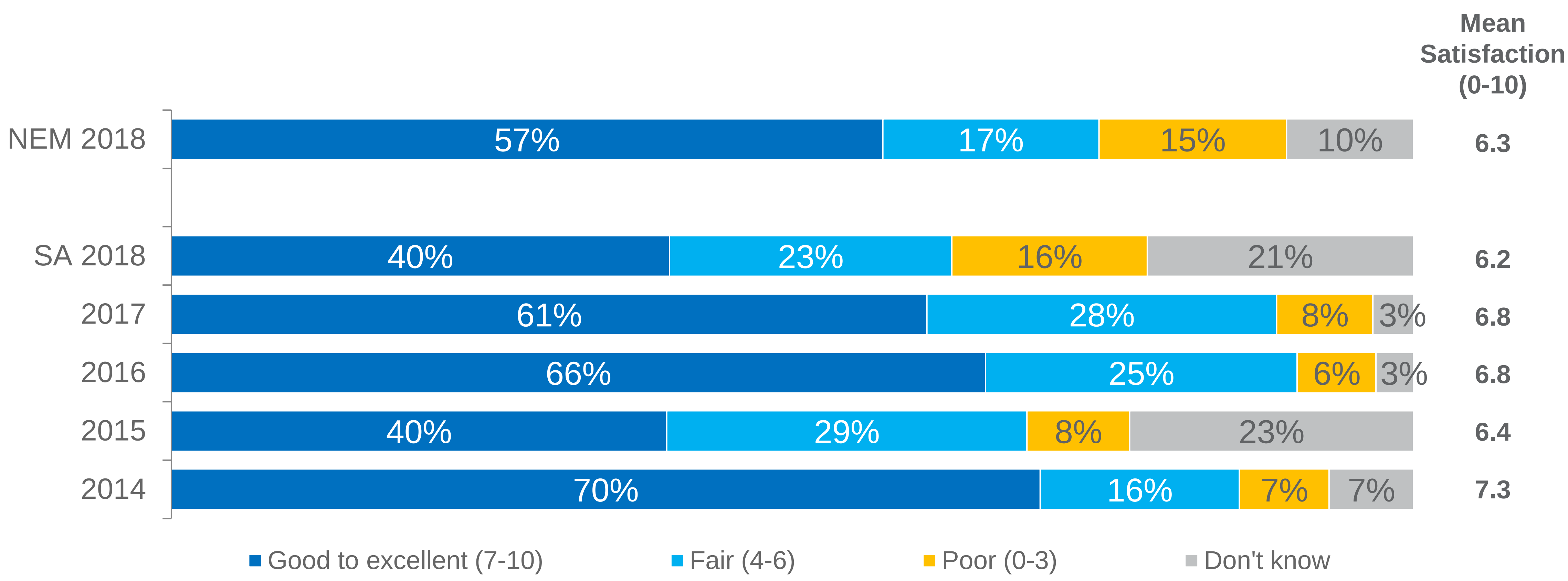
- Average satisfaction with the current electricity provider decreased slightly in 2018 among SA businesses (3.8 in 2017 to 3.5 in 2018).



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Satisfaction with customer service among electricity providers

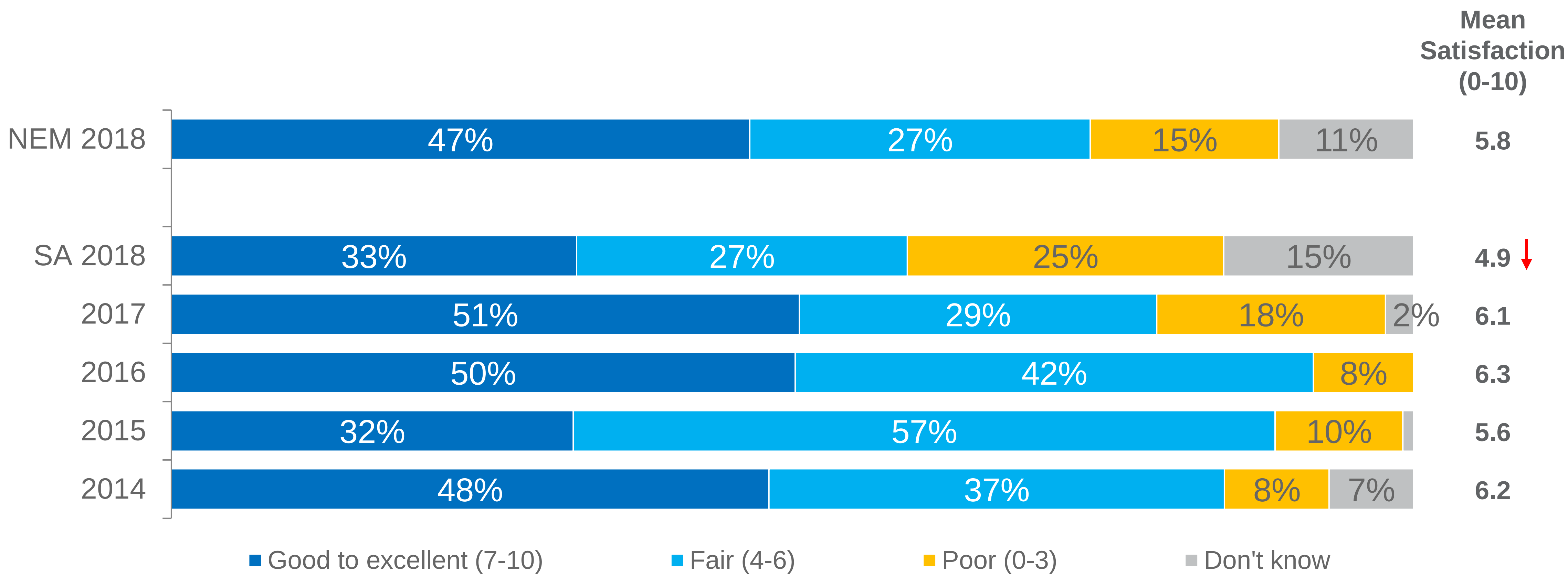
- SA businesses in 2018 recorded the lowest level of satisfaction on average with their electricity provider's customer service since 2014.
- Approximately one in five (21%) of SA businesses in 2018 did not know how they would rate the customer service of their electricity provider.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Value for money among electricity providers

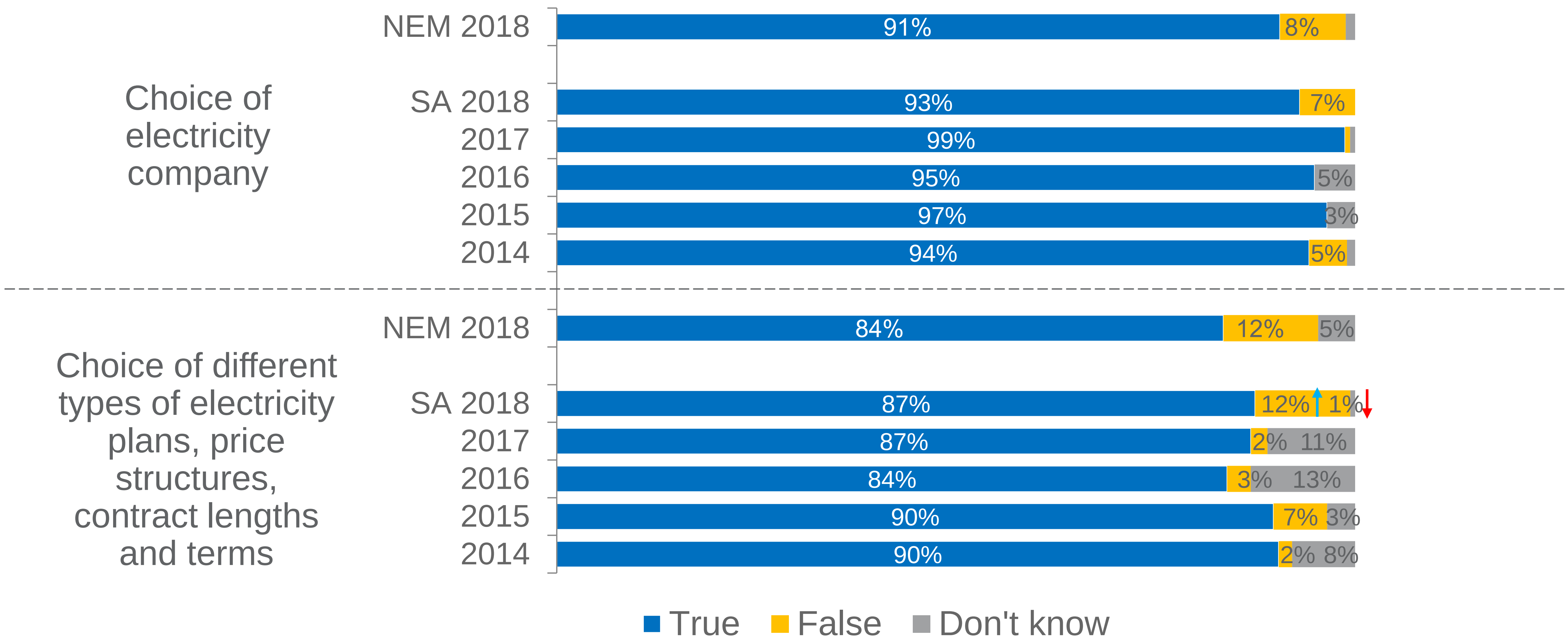
- Among SA businesses, there was a significant decrease in the perception that their electricity provider provides value for money (4.9 in 2018 compared to 6.1 in 2017).



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Perceptions of choice – electricity market

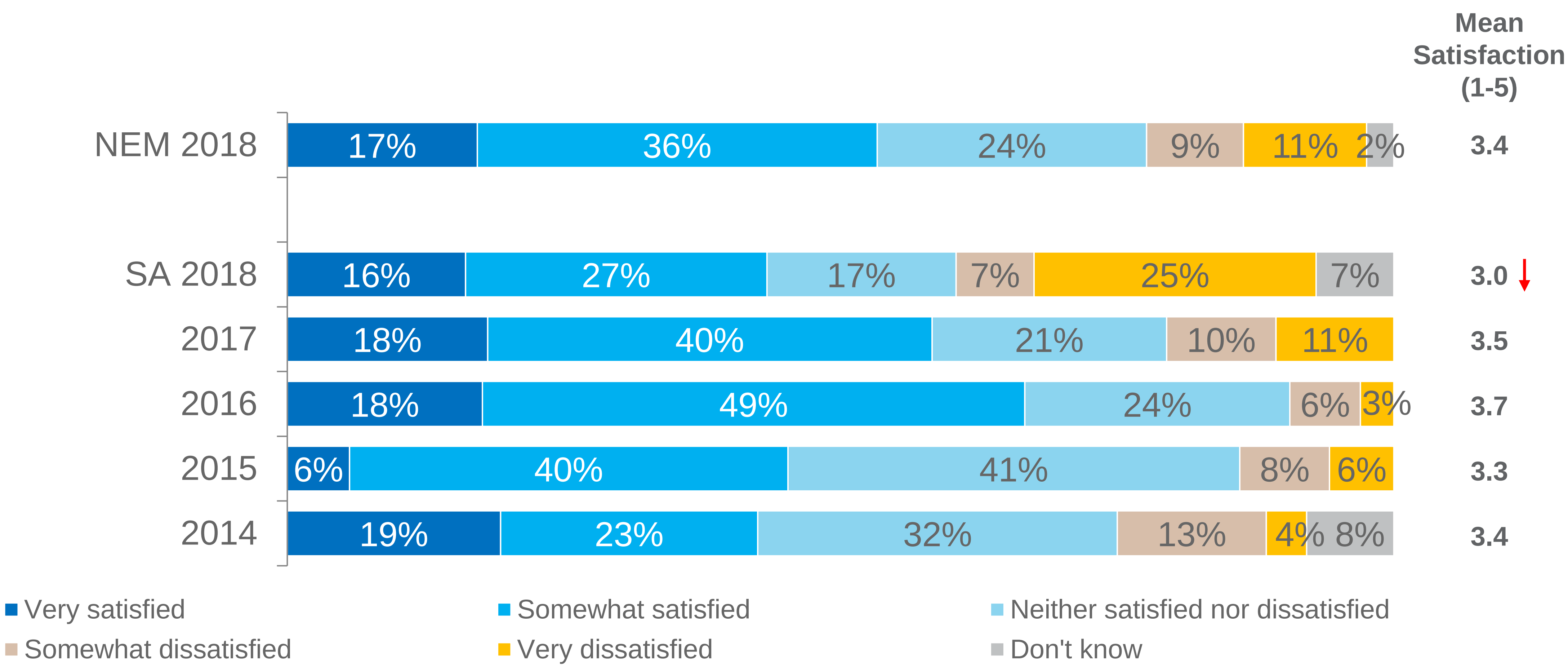
- SA businesses in 2018 were significantly more likely to believe that they do not have a choice of different types of electricity plans, price structures, contract lengths and terms (12% in 2018 compared to 2% in 2017).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Satisfaction with choice of energy companies and plans

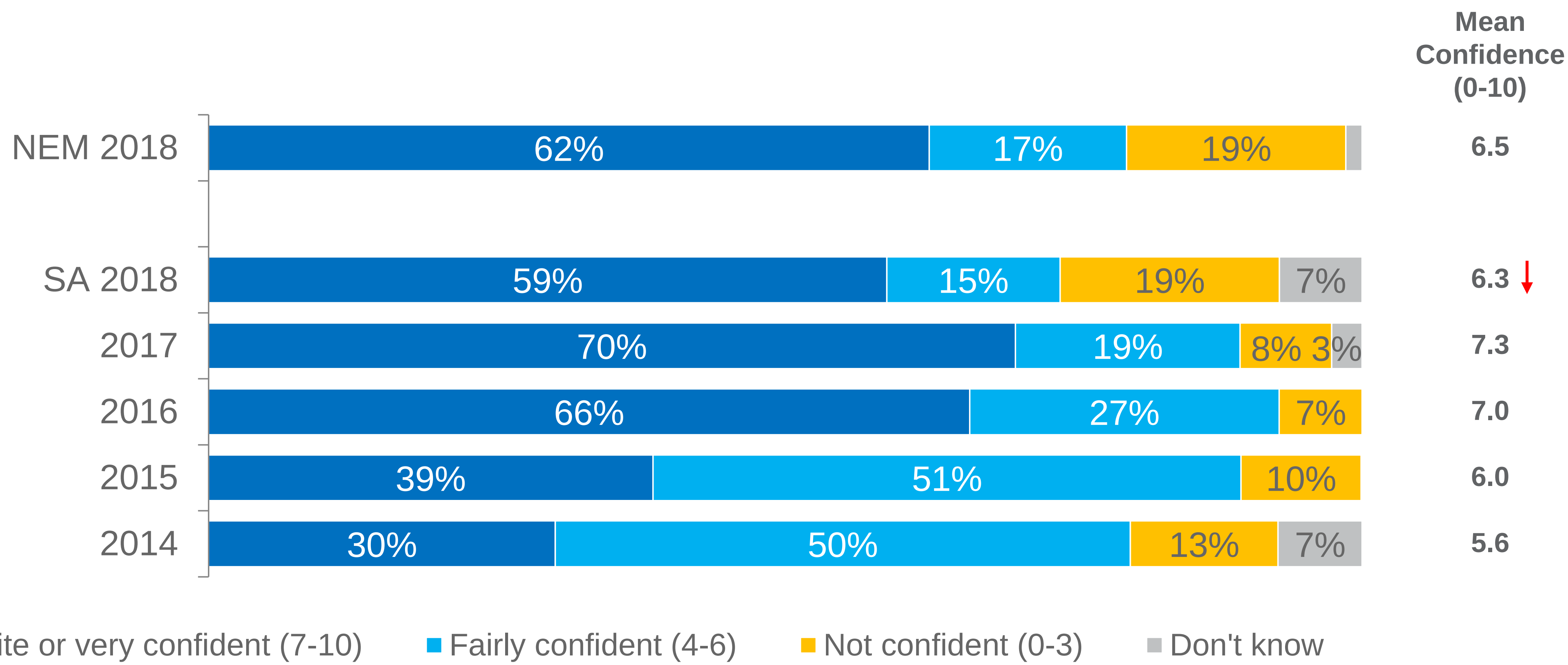
- The level of satisfaction with regards to choice of energy companies and plans decreased significantly in 2018 among SA businesses (from 3.5 in 2017 to 3.0 in 2018).
- This decrease was driven by one in four (25%) SA businesses indicating that they were ‘very dissatisfied’ with their level of choice, compared to 11% in 2017.



Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Confidence in finding the right information

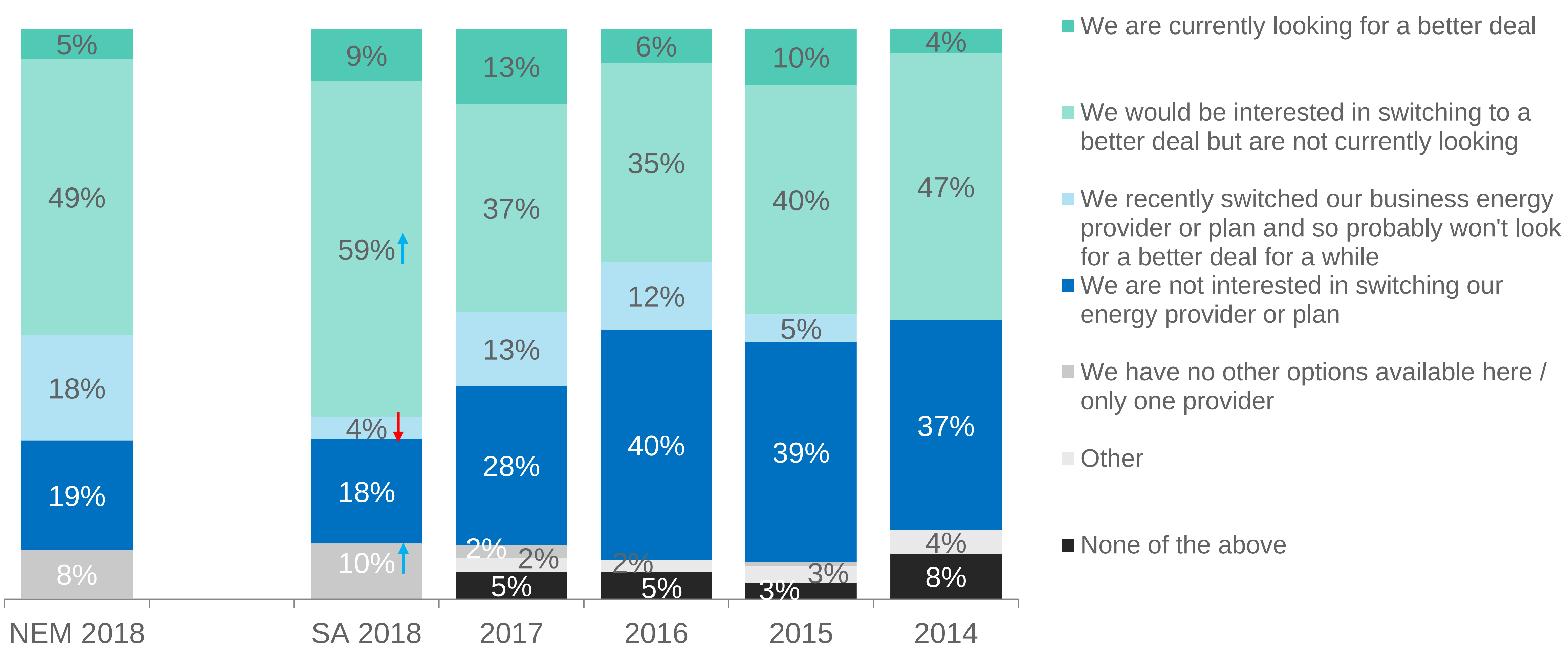
- SA businesses in 2018 feel significantly less confident on average when it comes to finding the right information to help them choose an energy plan (7.3 in 2017, down to 6.3 in 2018).



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Intentions to switch in the future

- There was a significant increase in the proportion of SA businesses that would be interested in switching to a better deal but are not currently looking (37% in 2017, up to 59% in 2018).
- Furthermore, there was also a significant increase in the proportion of SA businesses who report having no other options available here/only one provider (2% in 2017, up to 10% in 2018).



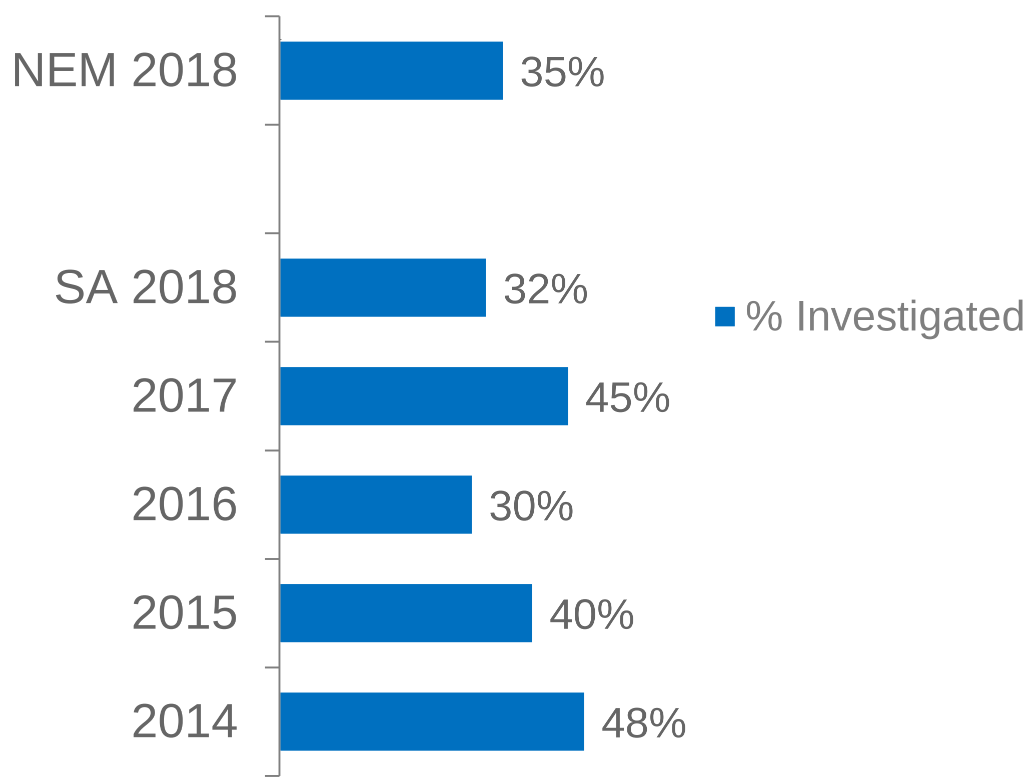
Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

colmar brunton.

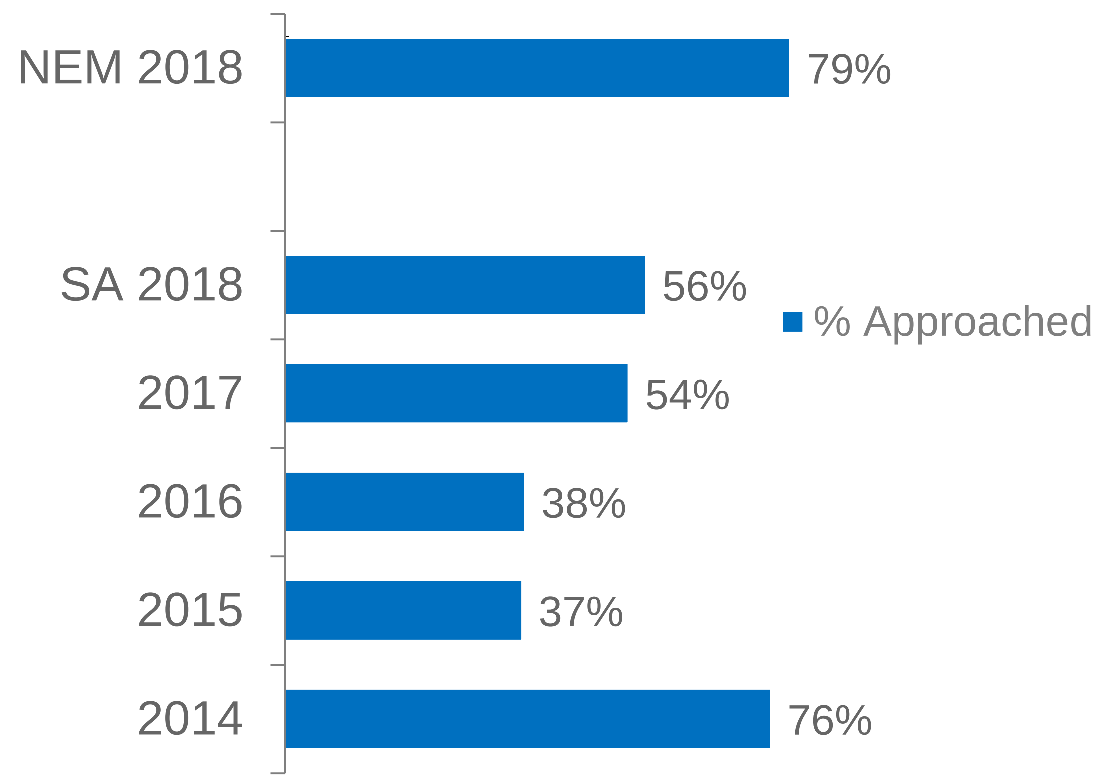
Interaction with alternative energy options / retailers

- Just under a third of SA businesses (32%) in 2018 reported that they have actively investigated different energy options in the past 12 months, representing a decline from 45% in 2017.
- More than half of SA businesses (56%) in 2018 reported that they were approached by an alternative energy retailer in the last 12 months, consistent with the result for 2017 (54%).

Actively investigated different energy options in past 12 months



Approached by alternative energy retailer in last 12 months

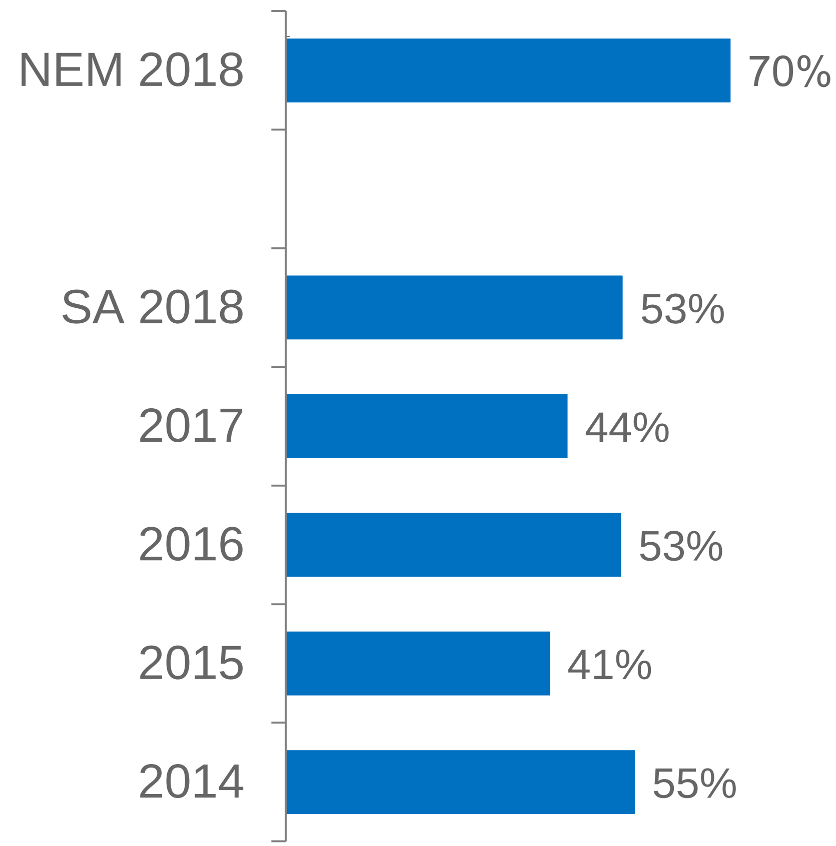


Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants/ECGM participants: 2018 (n=327). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70)

Rates of switching in the last 5 years

- Around half (53%) of SA businesses in 2018 reported switching either their electricity/gas company or plan in the past 5 years, which was similar to the switching rates recorded in 2014 (55%) and 2016 (53%).

Switched anything (gas / electricity company or plan) in the last 5 years.

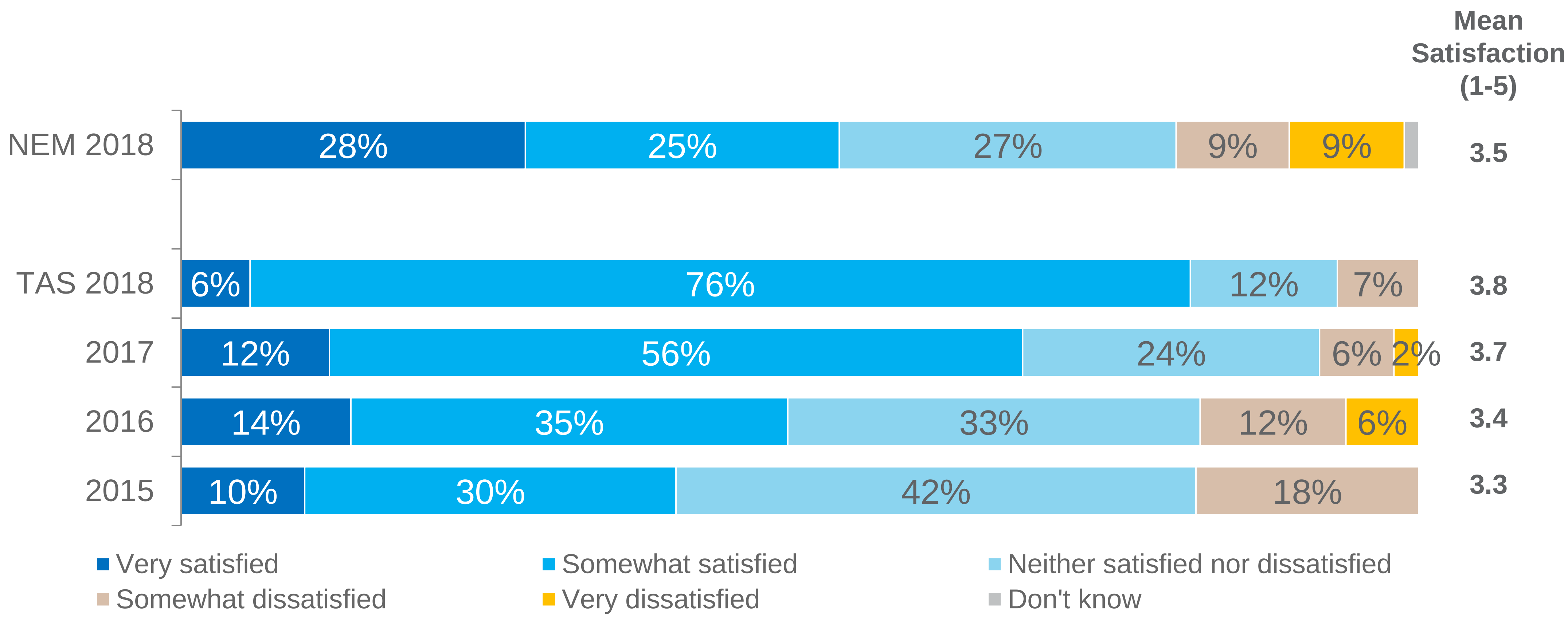


Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=69)

Tasmania

Overall satisfaction with current electricity provider

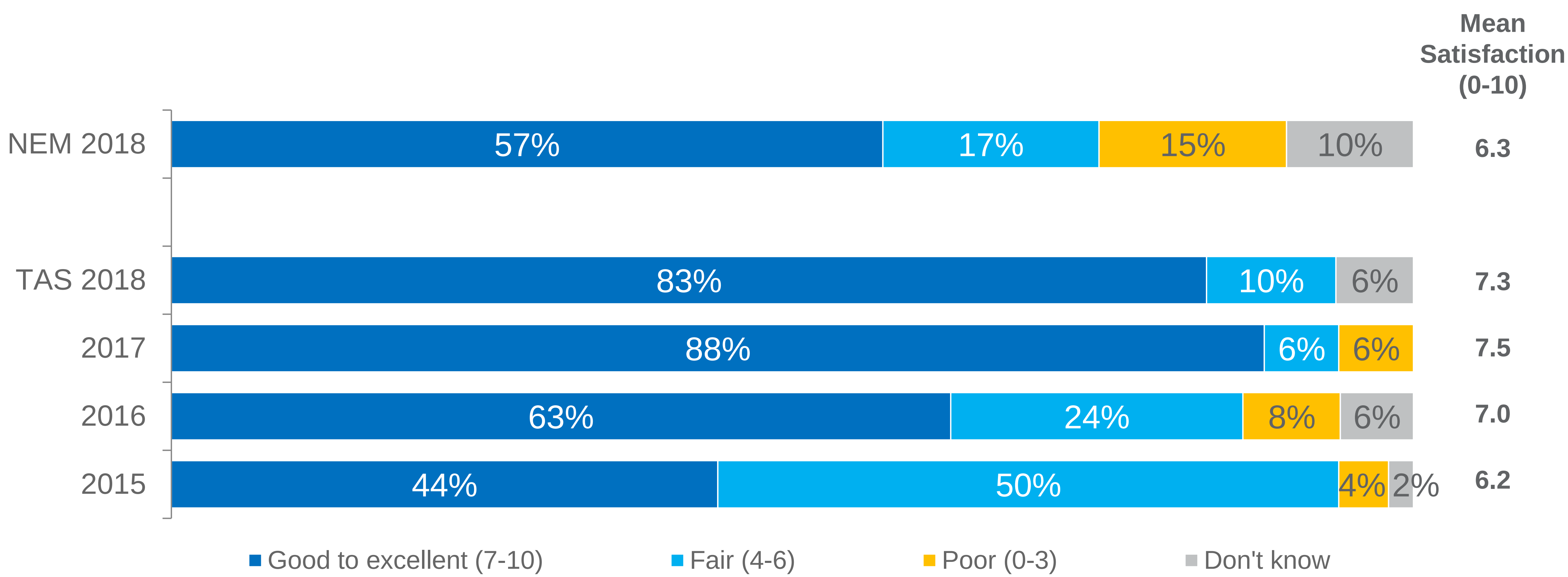
- Average satisfaction with their current electricity provider increased slightly in 2018 among TAS businesses (from 3.7 in 2017 to 3.8 in 2018).
- This is the highest mean satisfaction rating observed for TAS businesses since 2015.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

Satisfaction with customer service among electricity providers

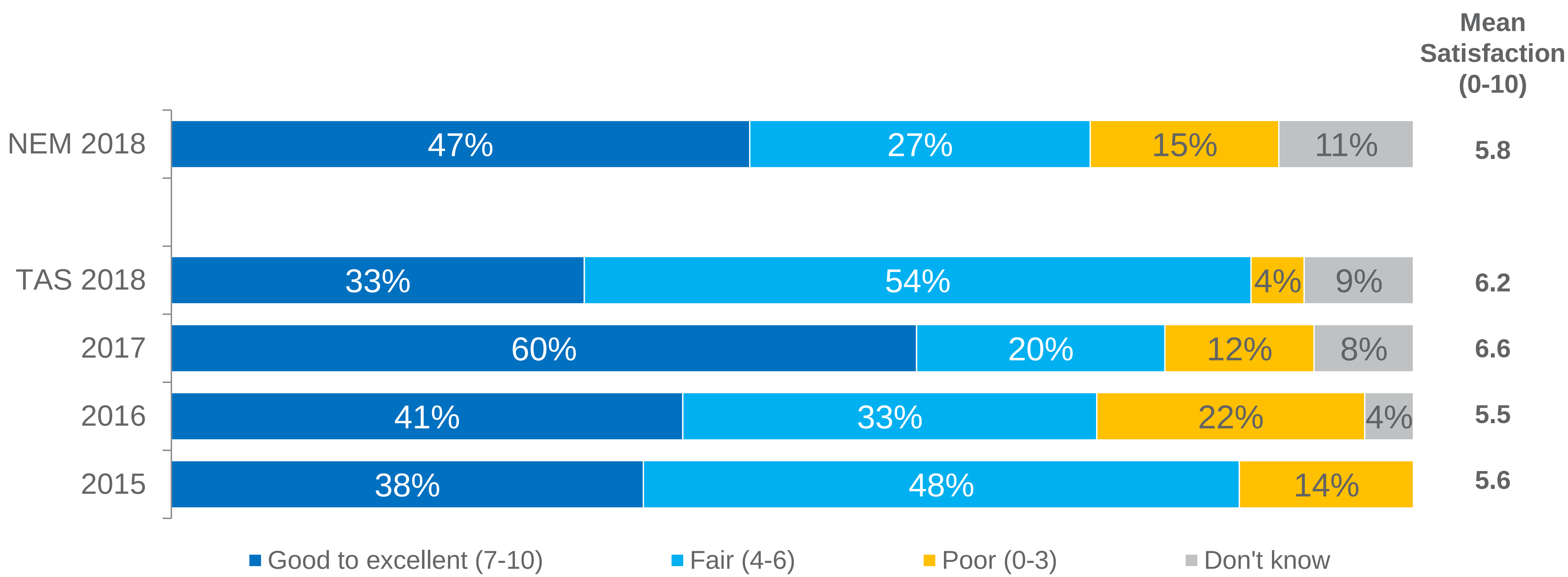
- Among TAS businesses, average satisfaction with the quality of customer service decreased slightly from 7.5 in 2017 to 7.3 in 2018.
- It should also be noted that approximately four out of five (83%) TAS businesses thought that customer service among electricity providers was either good or excellent.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

Value for money among electricity providers

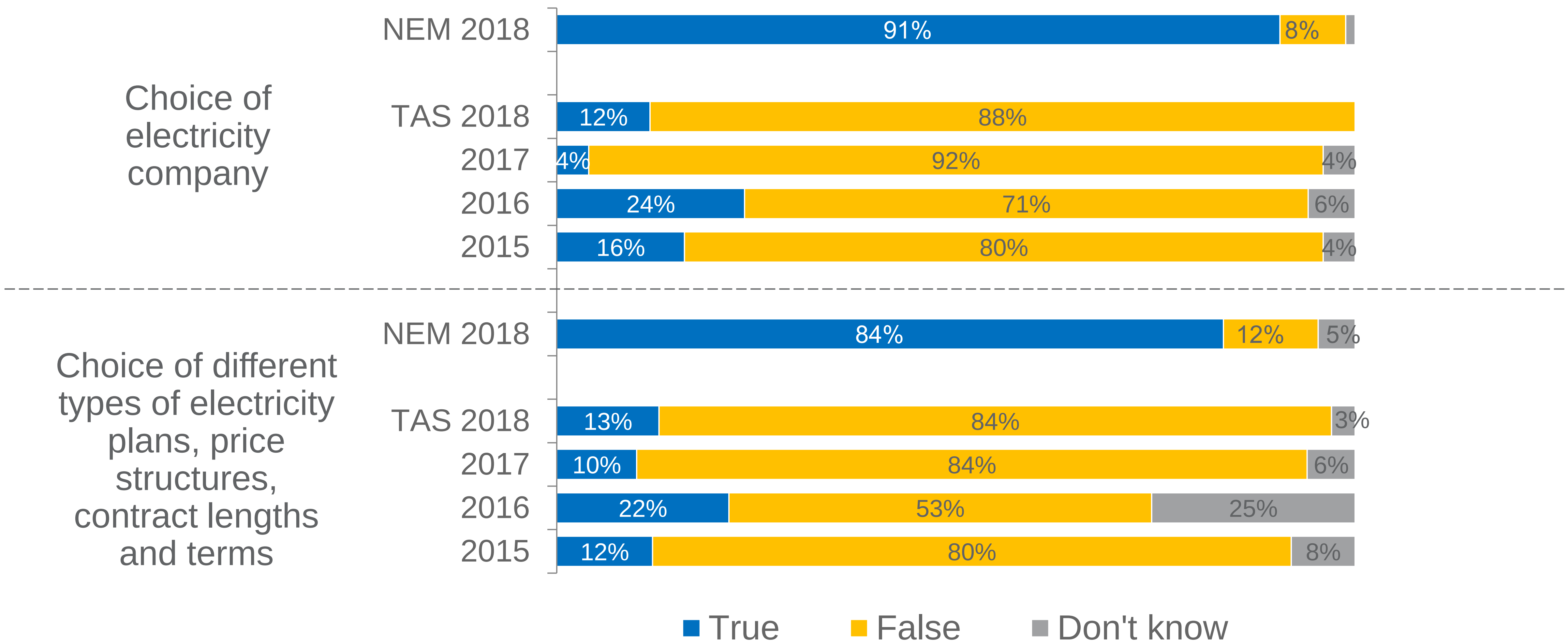
- Perceptions of value for money have declined from a mean of 6.6 in 2017 to 6.2 in 2018, however no significant differences were observed.
- Just over half (54%) of TAS businesses reported the value for money among electricity providers as being fair.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

Perceptions of choice – electricity market

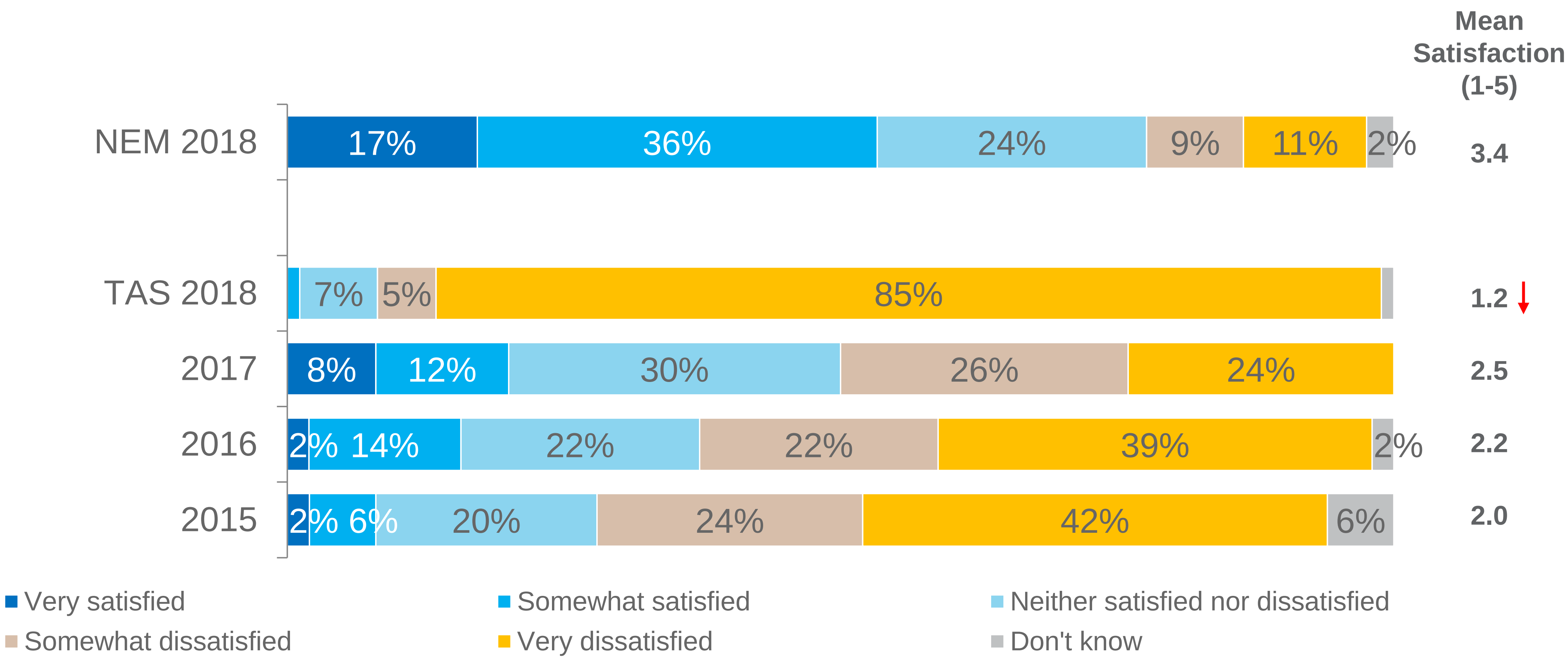
- In line with previous results, the overwhelming majority (88%) of TAS businesses in 2018 reported that they do not have a choice of electricity company.
- Similarly, a large proportion (84%) of TAS businesses in 2018 also felt that they do not have a choice of different electricity plans, price structures, contract lengths, and terms.



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

Satisfaction with choice of energy companies and plans

- Average satisfaction with the choice of energy companies and plans significantly decreased among TAS businesses in 2018 (from 2.5 in 2017 to 1.2 in 2018).
- Of note, 85% of TAS businesses in 2018 were 'very dissatisfied' with the choice of energy companies and plans, which is substantially higher than the result for 2017 (24%).

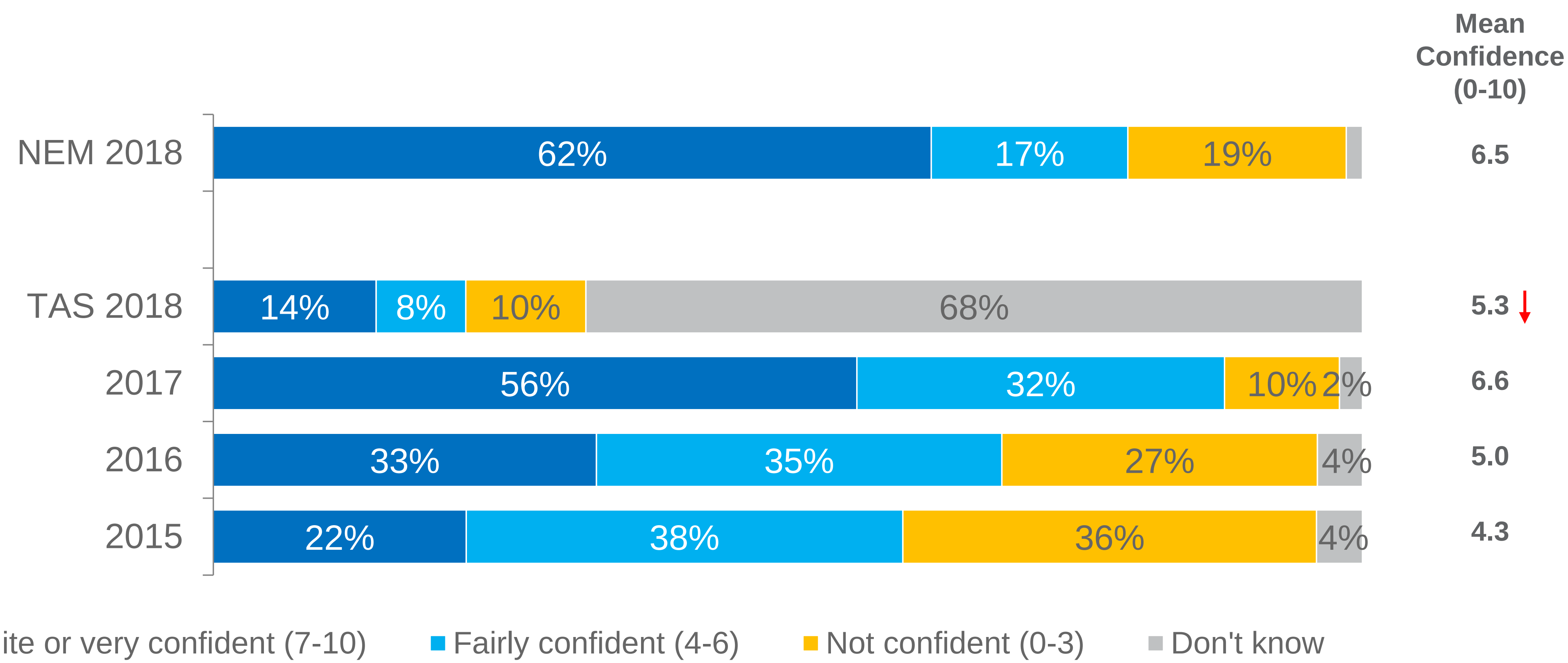


Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

colmar brunton.

Confidence in finding the right information

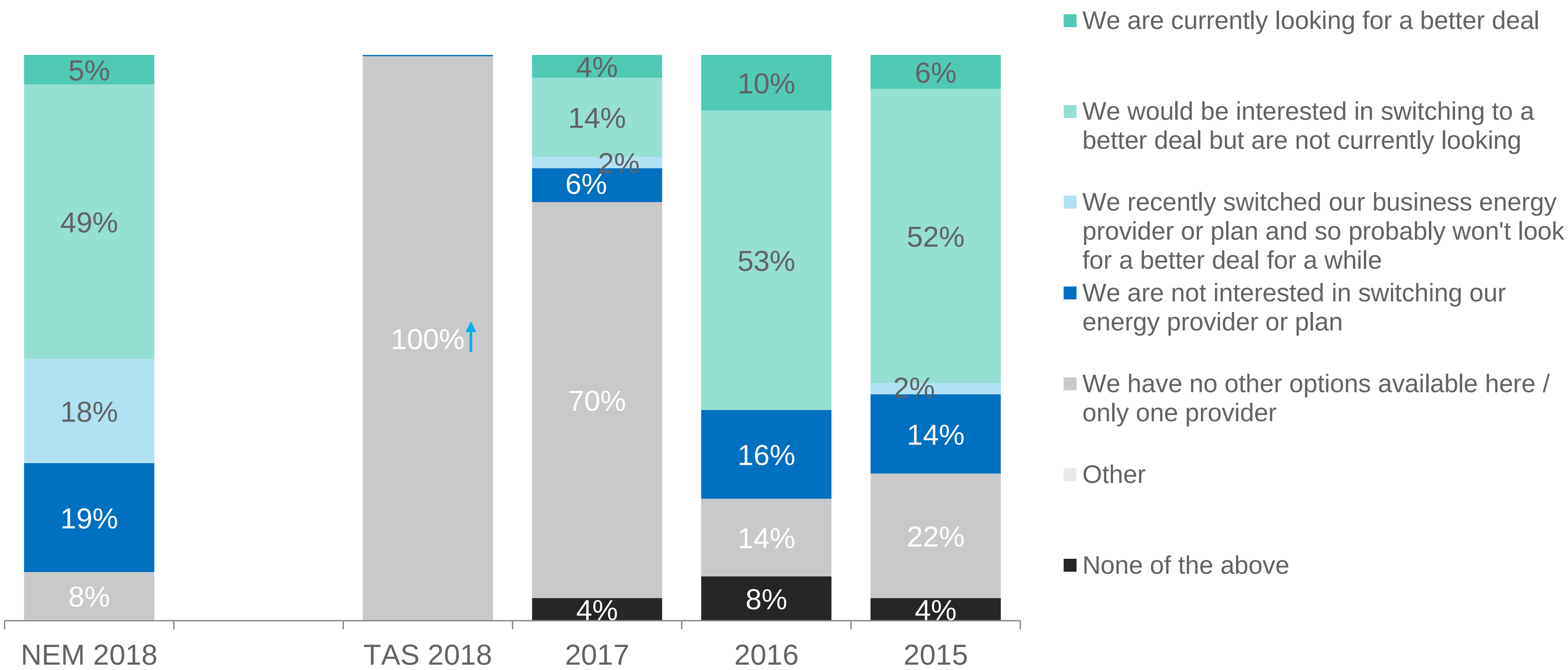
- Average self-rated confidence in finding the right information to help choose an energy plan decreased significantly among TAS businesses in 2018 (6.6 in 2017 to 5.3 in 2018).
- Interestingly, just over two-thirds (68%) of TAS businesses did not know how confident they were in finding the right information for choosing an energy plan.



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

Intentions to switch in the future

- There was a significant decline in TAS businesses who reported that they were currently looking for a better deal (0% in 2018, down from 14% in 2017).
- Additionally, every TAS business (100%) reported that they have no other options available here/only one provider, which is a significant increase from 70% in 2017.



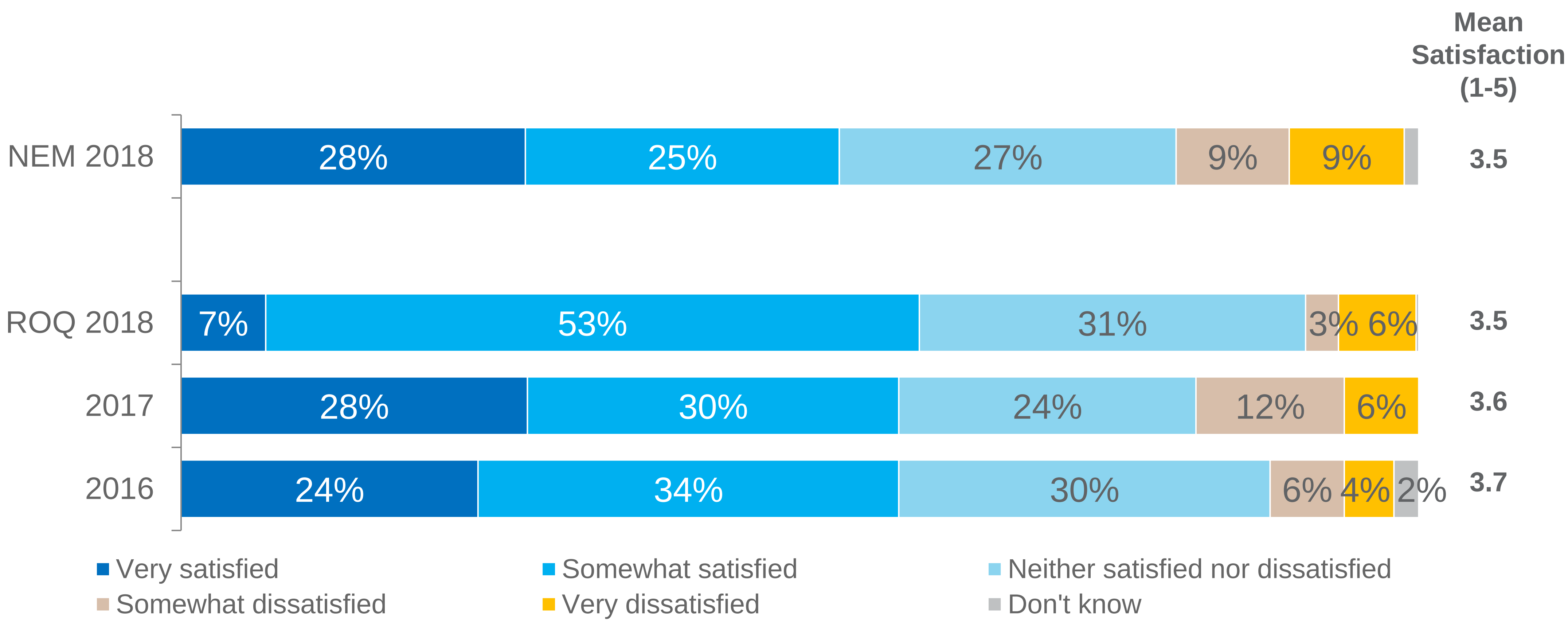
Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37)

colmar brunton.

Rest of Queensland

Overall satisfaction with current electricity provider

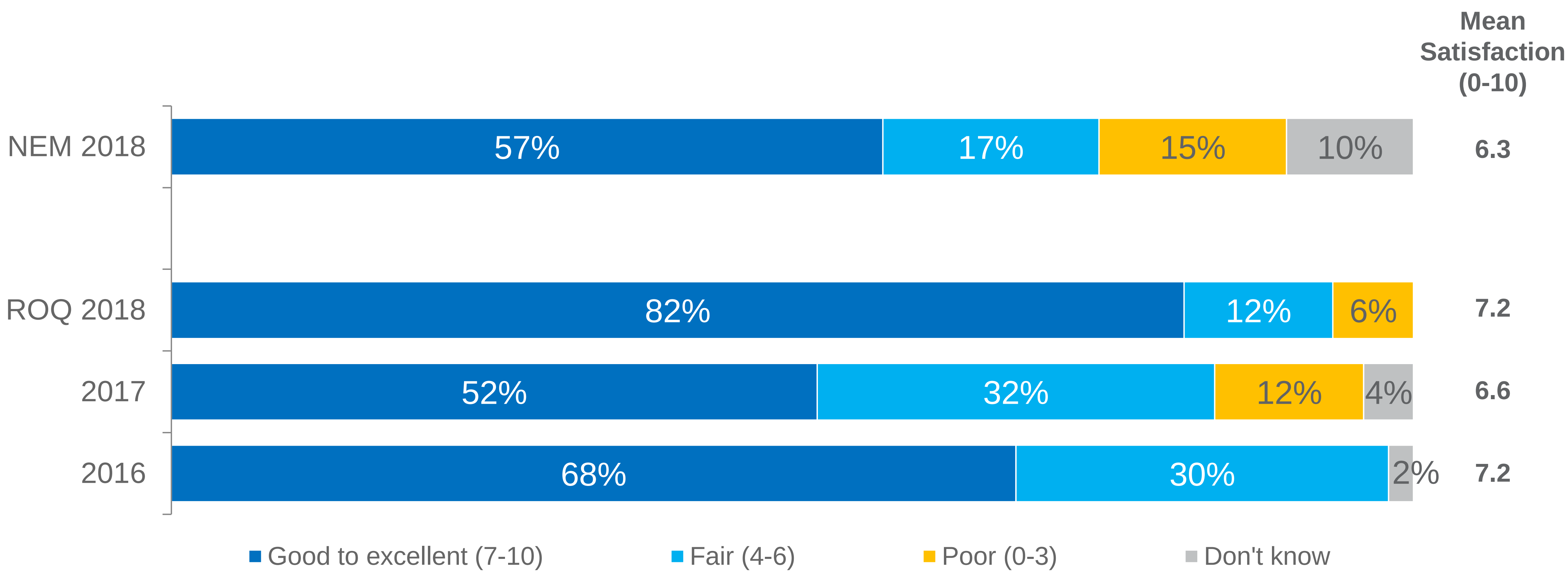
- Average satisfaction with the current electricity provider among ROQ businesses in 2018 was similar to previous years.
- However, there was a decrease in the proportion who feel ‘very satisfied’ (7% in 2018, compared to 28% in 2017), with more 2018 ROQ businesses instead choosing ‘somewhat satisfied’ (53% in 2018, compared to 30% in 2017).



Q2. Overall, how satisfied are you with your business’s current [electricity / energy] company?
Direction of mean rating: 1 = ‘Very Dissatisfied’ and 5 = ‘Very Satisfied’.
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Satisfaction with customer service among electricity providers

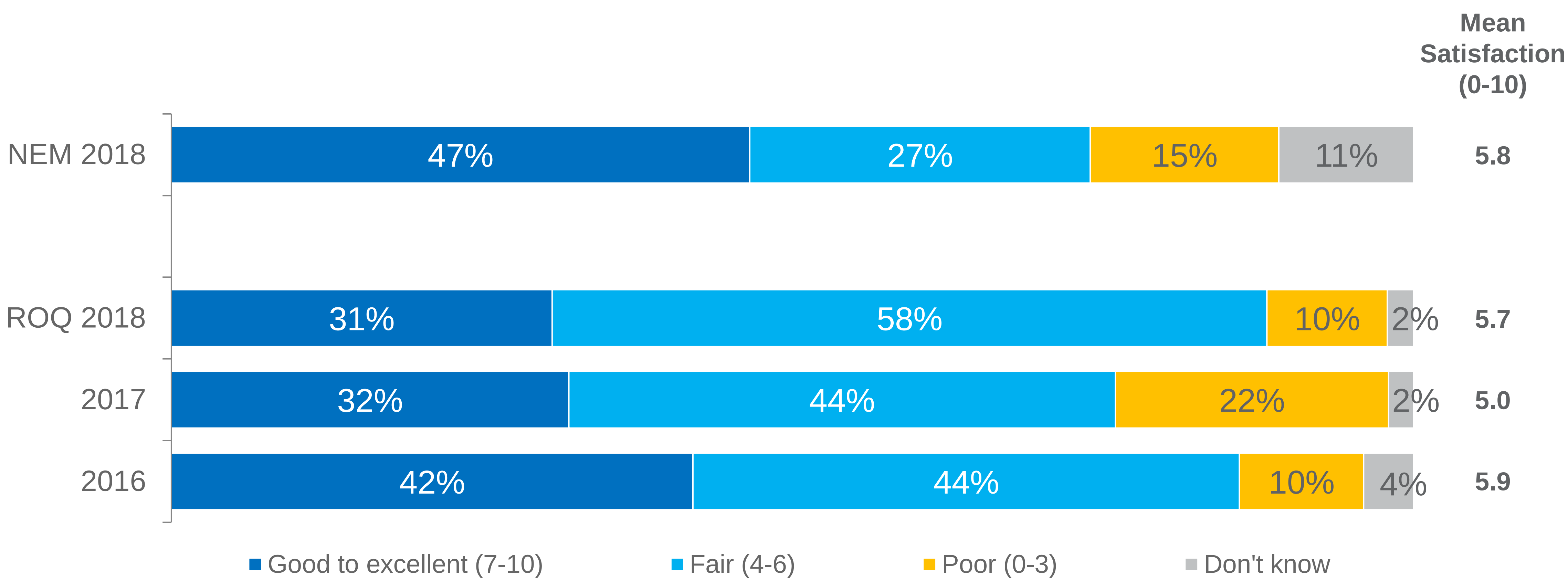
- Approximately four out of five (82%) ROQ businesses rated their electricity provider's customer service as good to excellent (7-10 rating), compared to 52% who provided the same rating in 2017.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Value for money among electricity providers

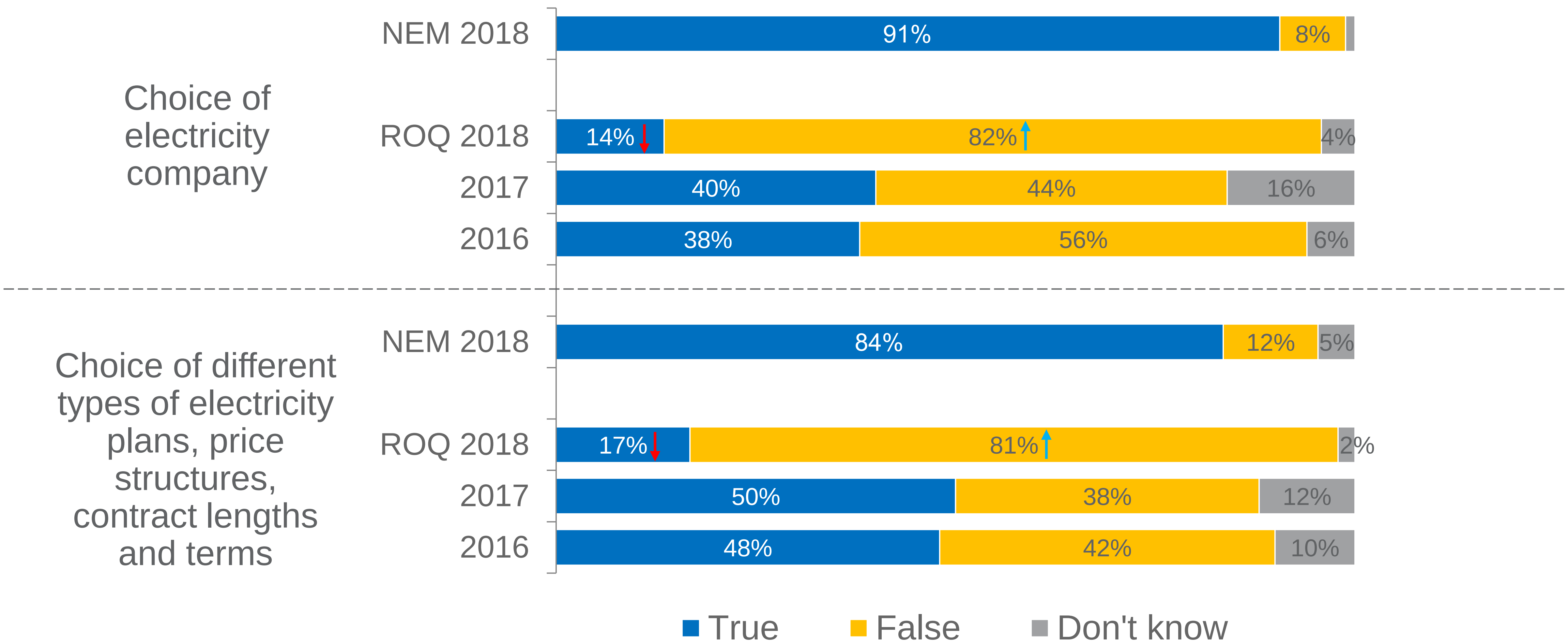
- Perceptions of value for money among electricity providers increased from a comparatively low mean score of 5.0 in 2017 to 5.7 in 2018.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Perceptions of choice – electricity market

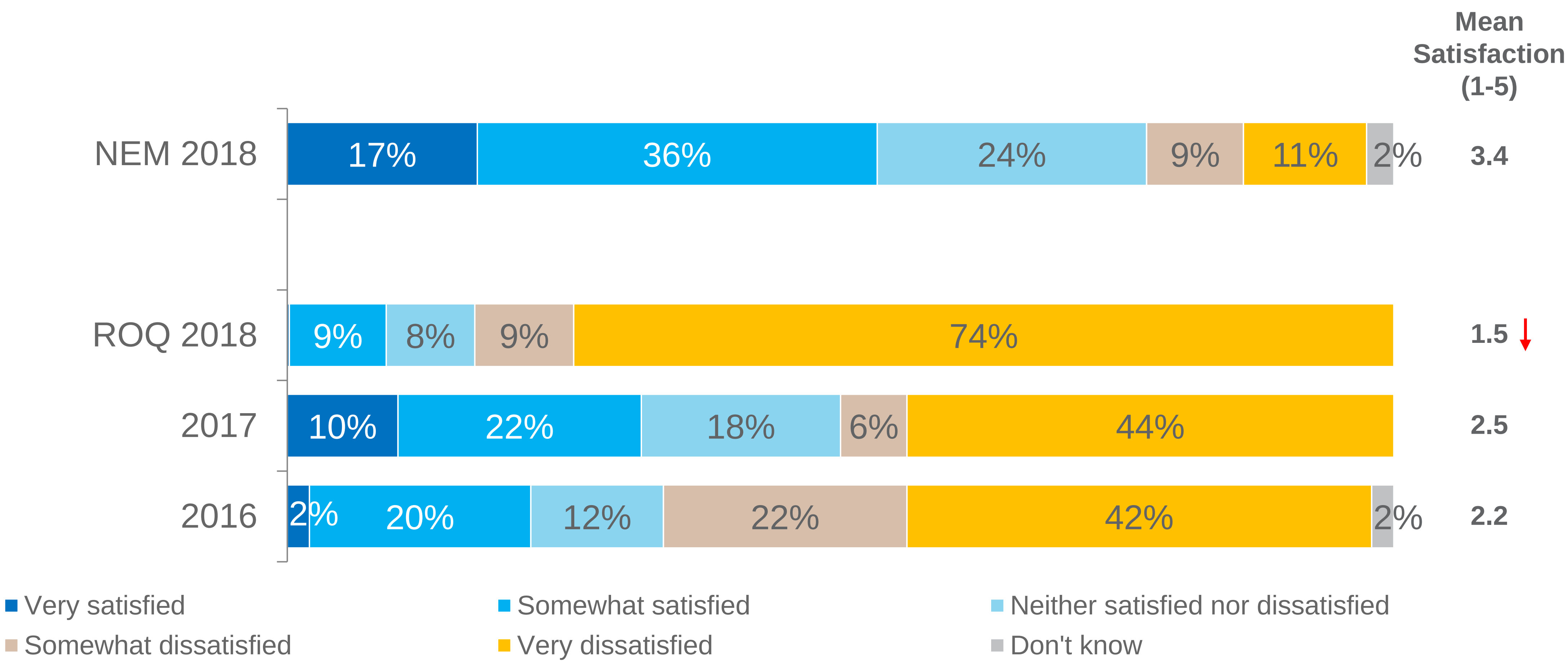
- The perceptions of choice in the electricity market differed widely in the 2018 results for ROQ businesses when compared to previous years.
- A significantly low 14% of ROQ businesses in 2018 believe that they have a choice of electricity company, and only 17% believe that they have a choice of electricity plan; it should be noted that the sample size for 2018 was relatively smaller (n=36) than previous years (both n=50).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Satisfaction with choice of energy companies and plans

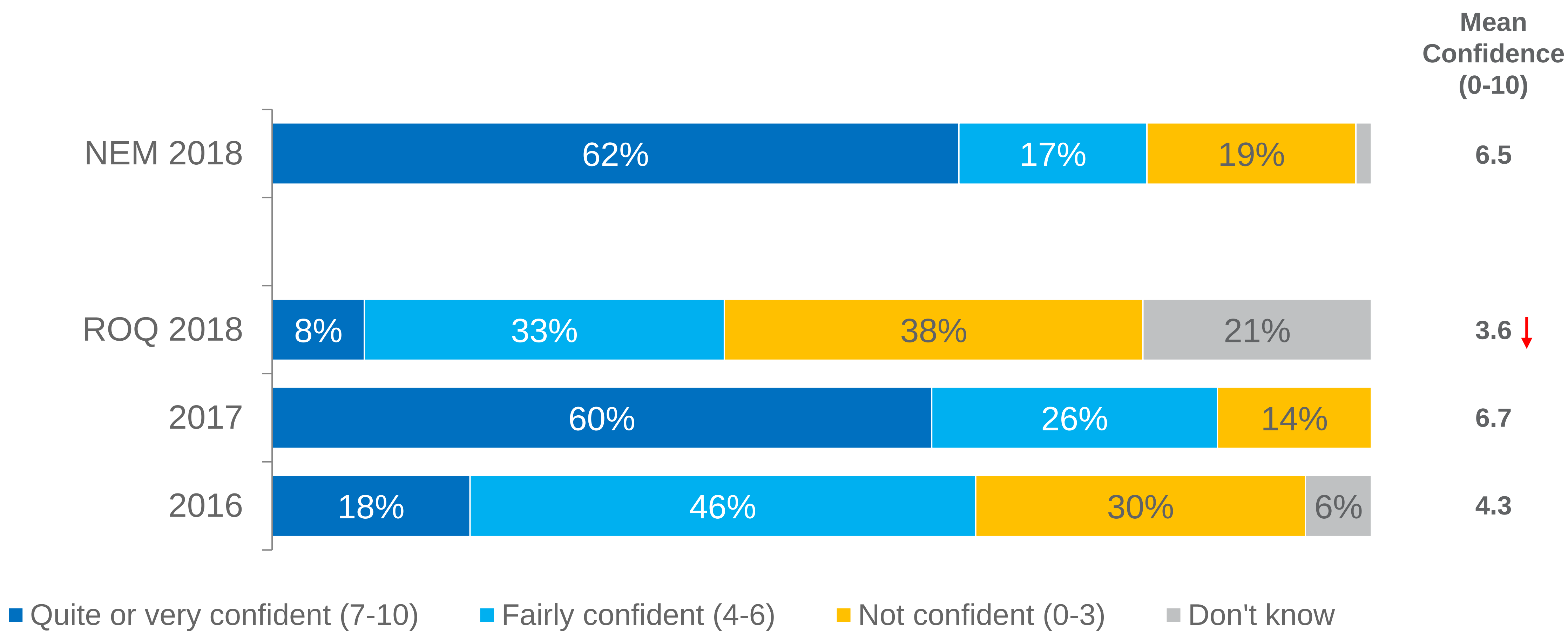
- Average satisfaction with the choice of energy companies available was significantly lower in 2018 among ROQ businesses (1.5, down from 2.5 in 2017).
- Approximately three in four (74%) of ROQ businesses in 2018 were 'very dissatisfied' with the level of choice available to them.



Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Confidence in finding the right information

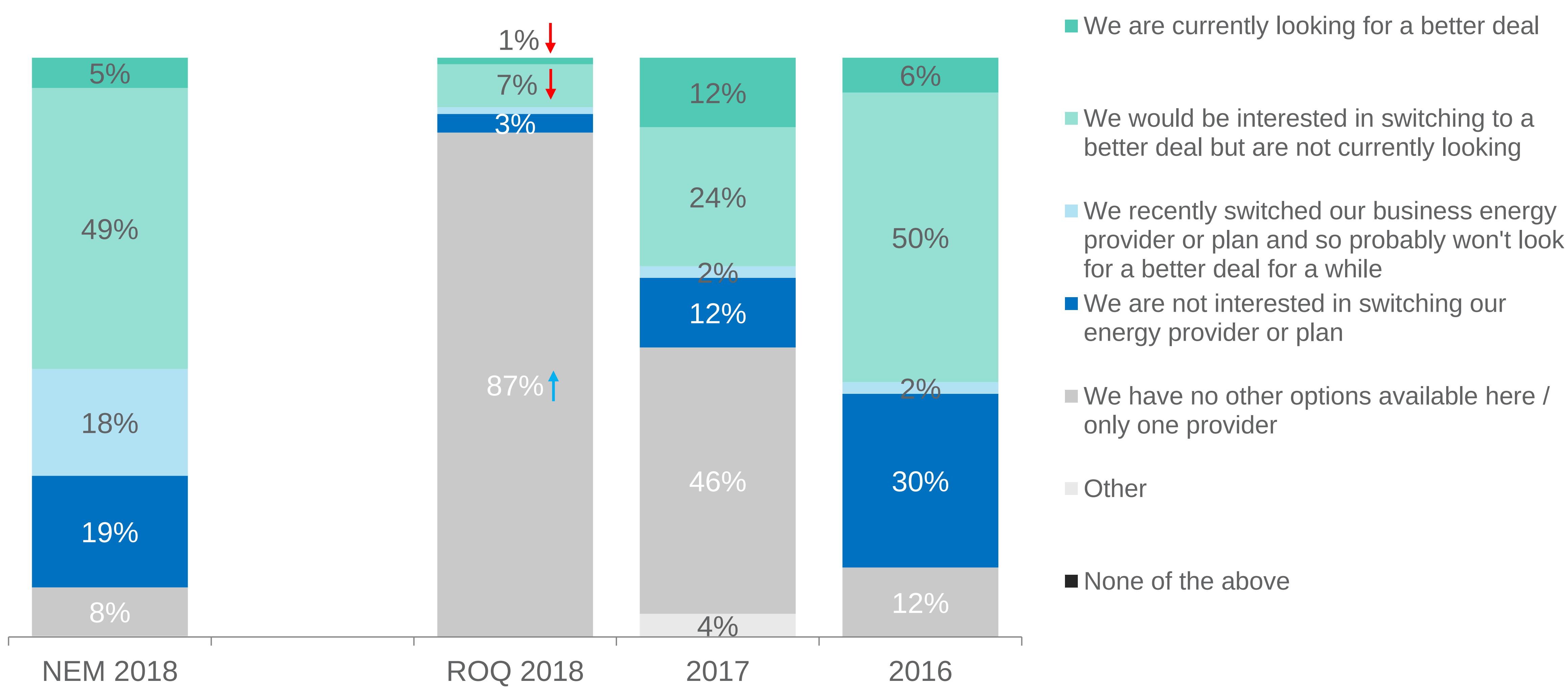
- ROQ businesses in 2018 reported having significantly lower levels of confidence to find the right information to help choose an energy plan (3.6, down from 6.7 in 2017).



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Intentions to switch in the future

- The majority of ROQ businesses in 2018 reported that they have no other options available here/only one provider (87%, significantly higher than 46% in 2017).
- ROQ businesses in 2018 were significantly less likely to select options that indicate a propensity to switch; only 7% would be interested in switching but are not currently looking and just 1% were currently looking for a better deal.

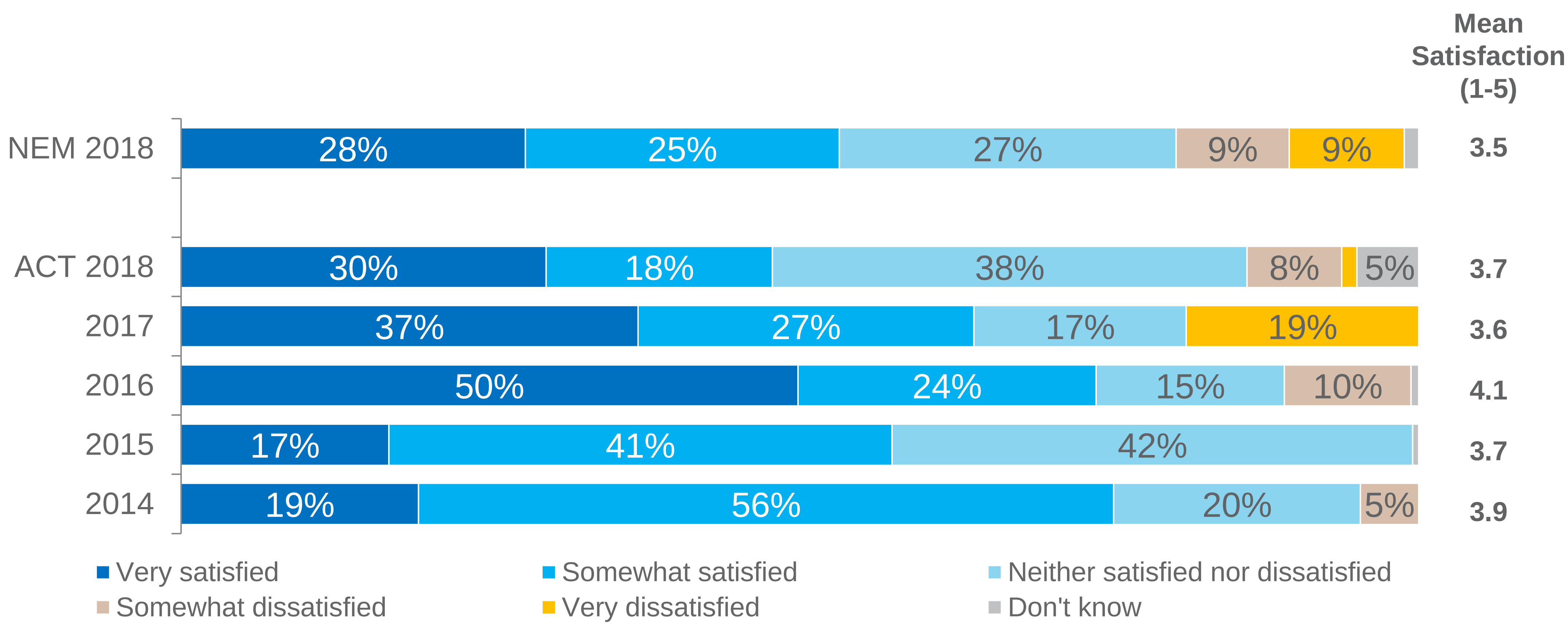


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36)

Australian Capital Territory

Overall satisfaction with current electricity provider

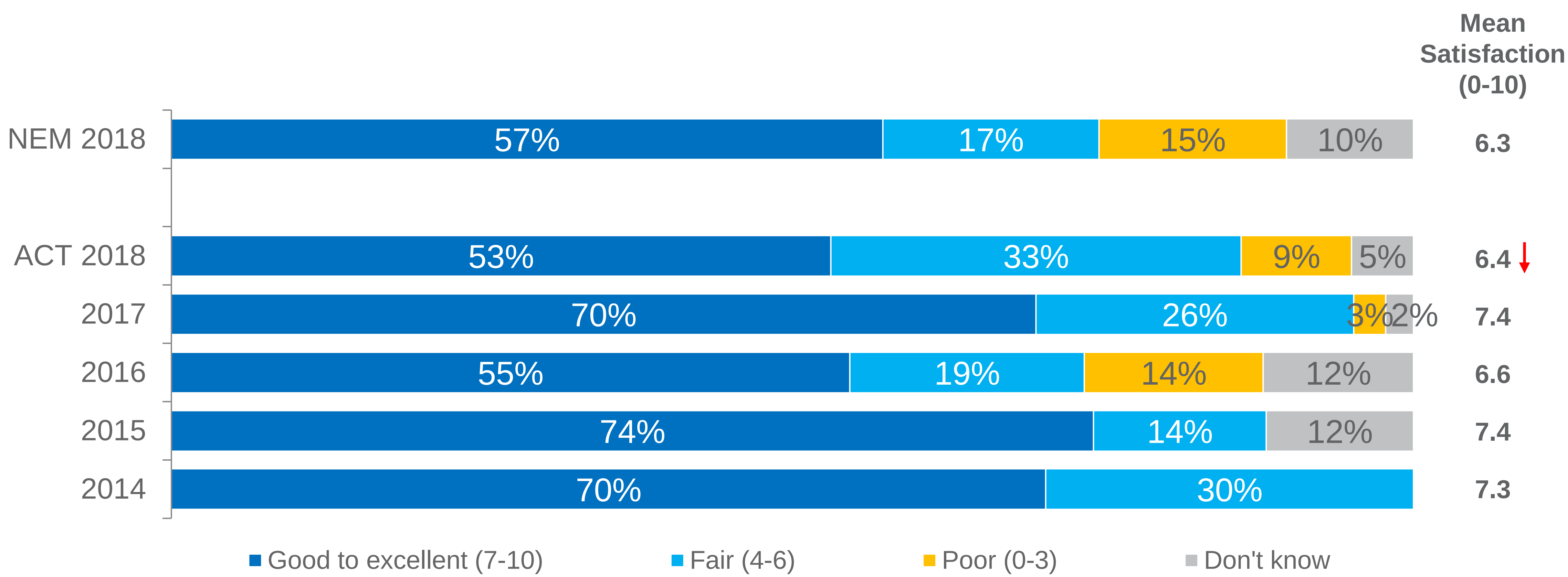
- Among ACT businesses, the average satisfaction with current electricity provider has remained relatively stable over time with no significant differences observed.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Satisfaction with customer service among electricity providers

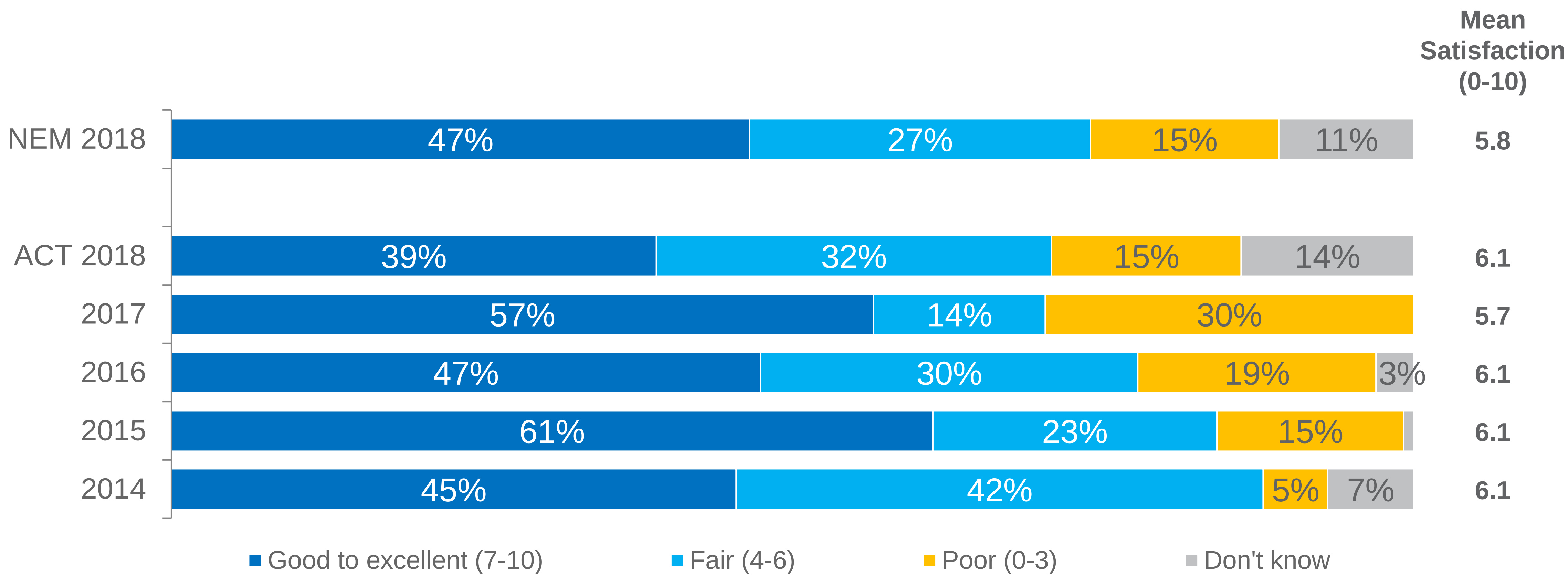
- Average satisfaction with customer service was significantly lower among ACT businesses in 2018 (7.4 in 2017 to 6.4 in 2018).
- This is the lowest average satisfaction with customer service observed for ACT businesses since the study commenced in 2014.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Value for money among electricity providers

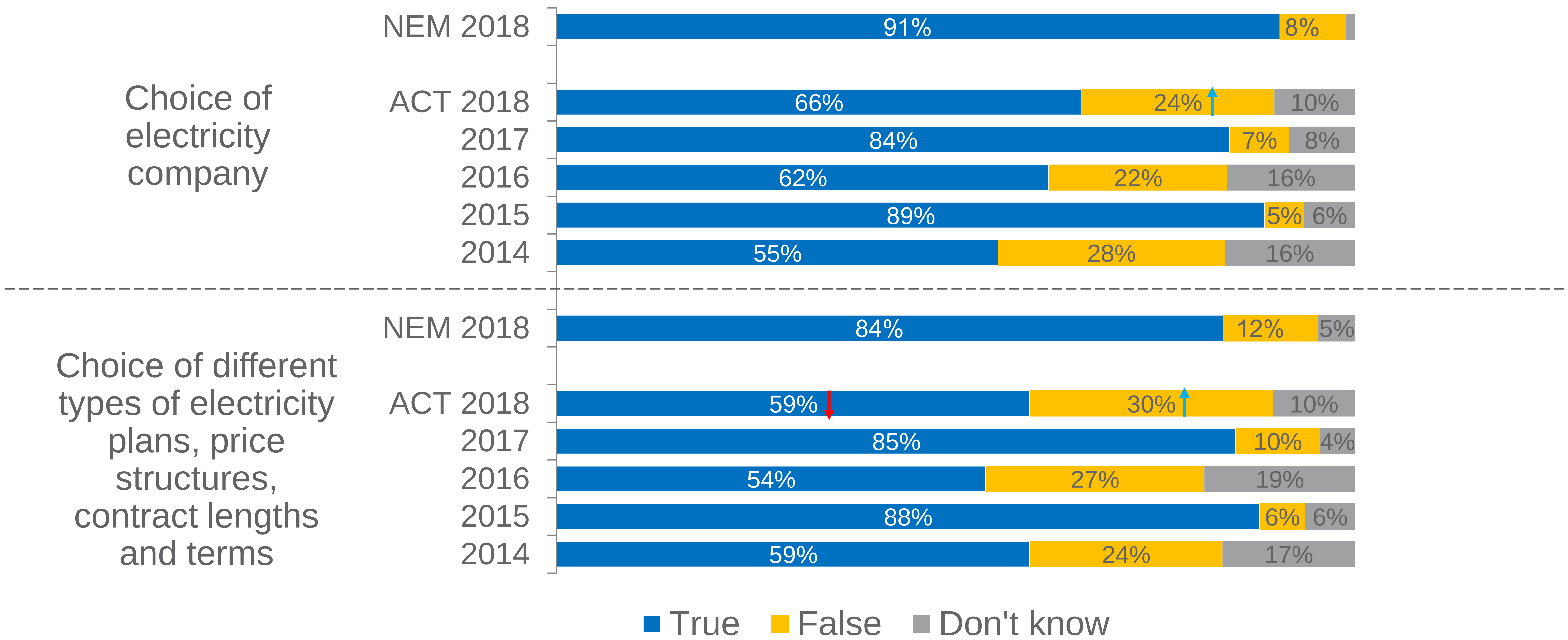
- Among ACT businesses in 2018, the perception that their electricity provider provides value for money increased slightly to 6.1 compared to 5.7 in 2017. Although no statistically significant results were observed, this brings the average satisfaction score back in line with the years prior to 2017.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Perceptions of choice – electricity market

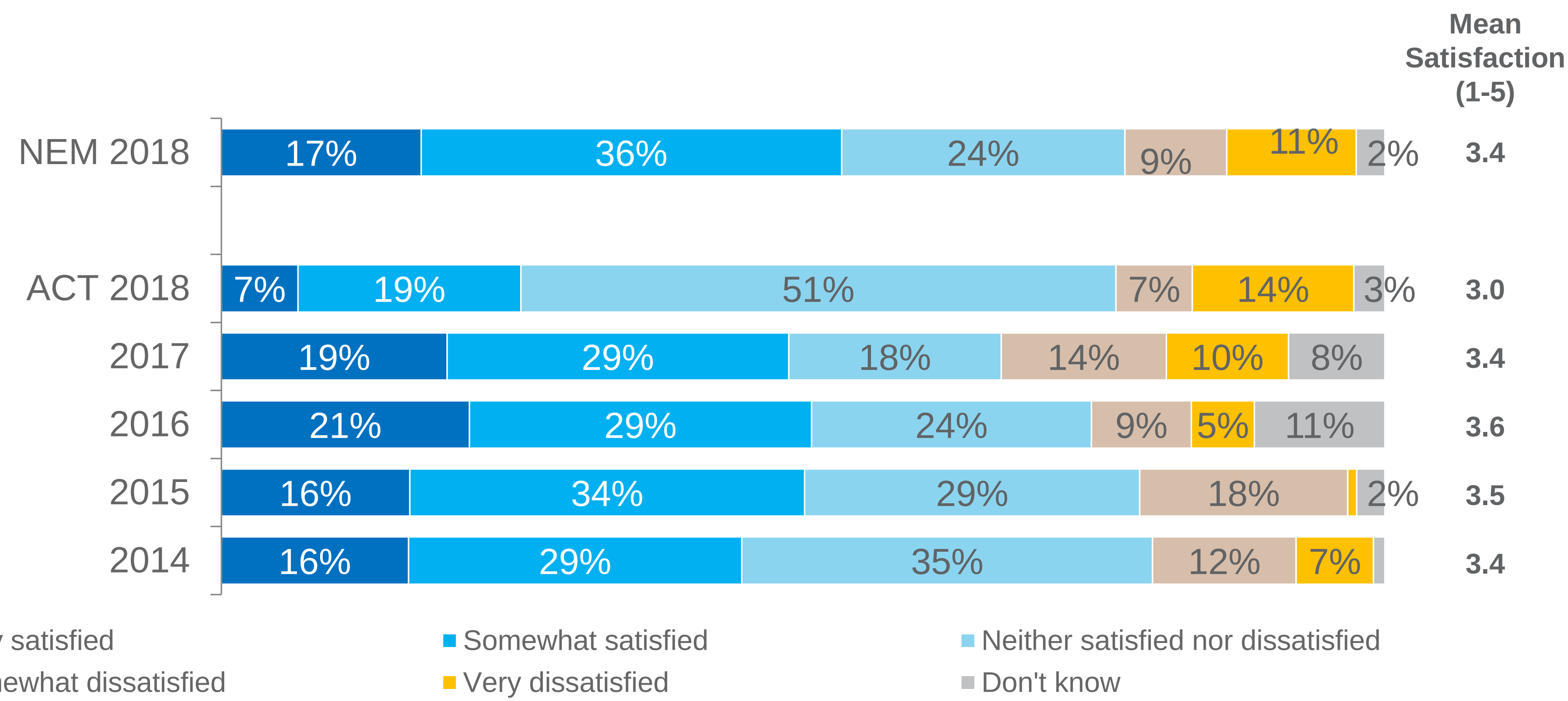
- ACT businesses were significantly more likely to believe that they do not have a choice of electricity company (24% in 2018 compared to 7% in 2017).
- There was also a significant increase in the number of ACT businesses who reported not having a choice of different electricity plans (10% in 2017 compared to 30% in 2018), with this change offset by a significant decrease in the proportion of ACT businesses who felt that they had a choice (85% in 2017 compared to 59% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Satisfaction with choice of energy companies and plans

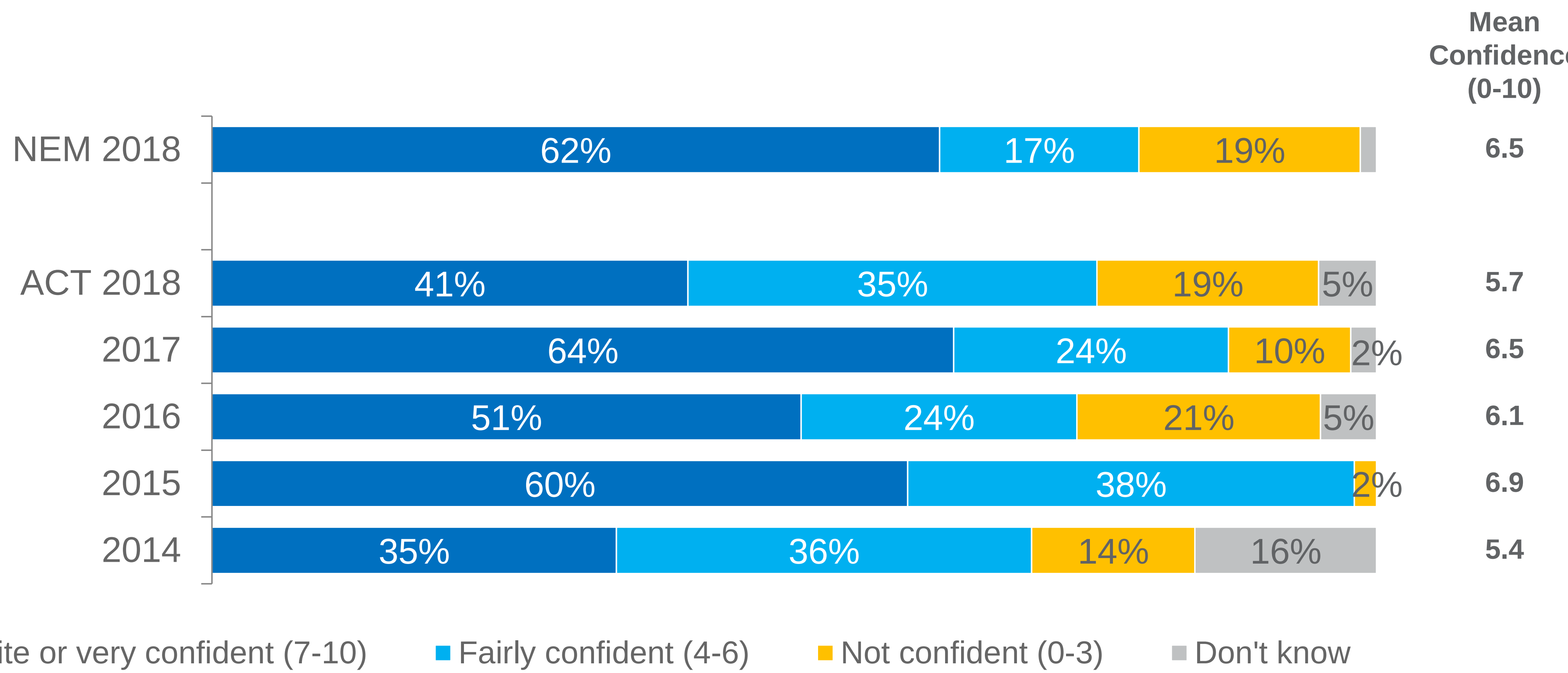
- Among ACT businesses, average satisfaction with the choice of energy companies and plans decreased from a mean of 3.4 in 2017 to 3.0 in 2018.
- Of note, 51% of ACT businesses in 2018 answered that they were ‘neither satisfied nor dissatisfied’, and just 7% answered that they were ‘very satisfied’ (compared to 19% in 2017).



Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Confidence in finding the right information

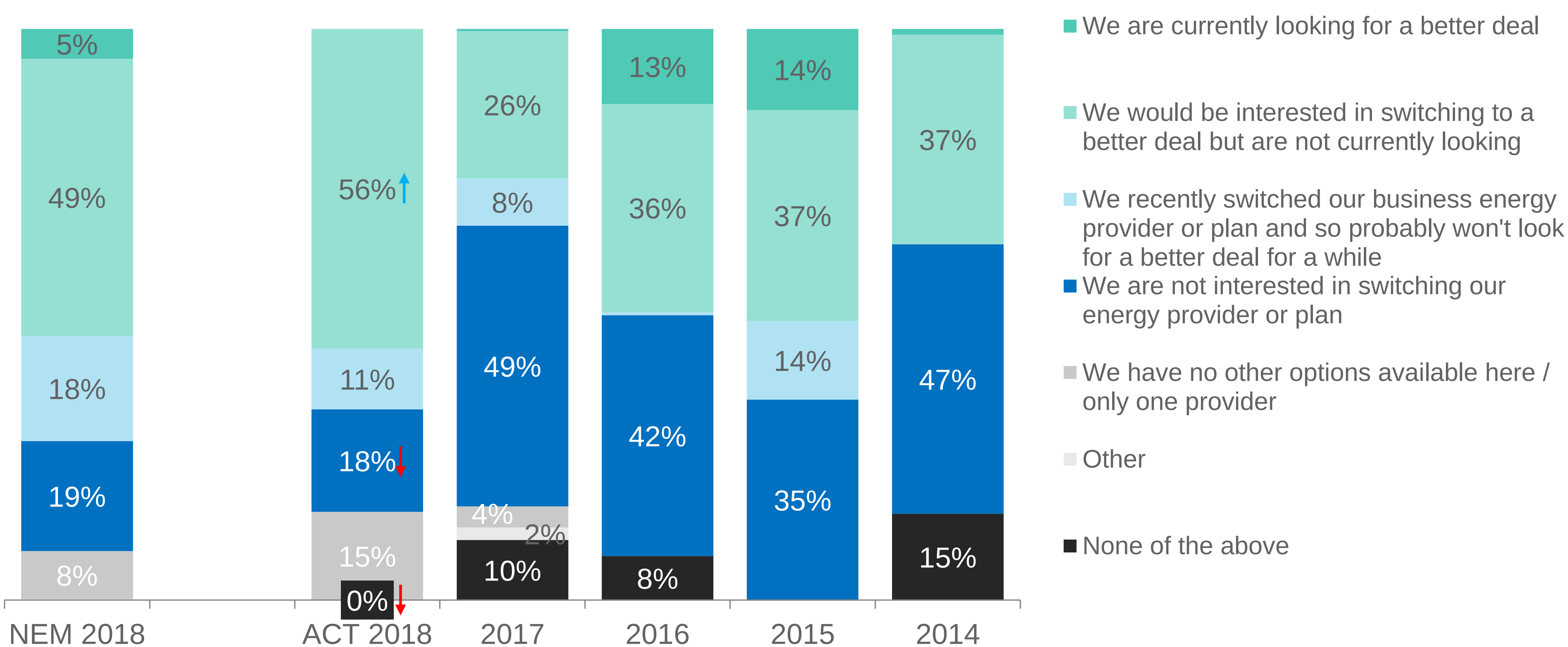
- ACT businesses in 2018 recorded a mean confidence of 5.7 when it comes to finding the right information to help choose an energy plan, representing a decline from 6.5 in 2017.



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Intentions to switch in the future

- ACT businesses in 2018 were significantly more likely to report that they were interested in switching to a better deal but are not currently looking (56% in 2018, compared to 26% in 2017).
- Furthermore, significantly fewer answered that they were not interested in switching their energy provider or plan (18% in 2018, compared to 49% in 2017).
- Interestingly, no ACT businesses indicated that they were currently looking for a better deal.

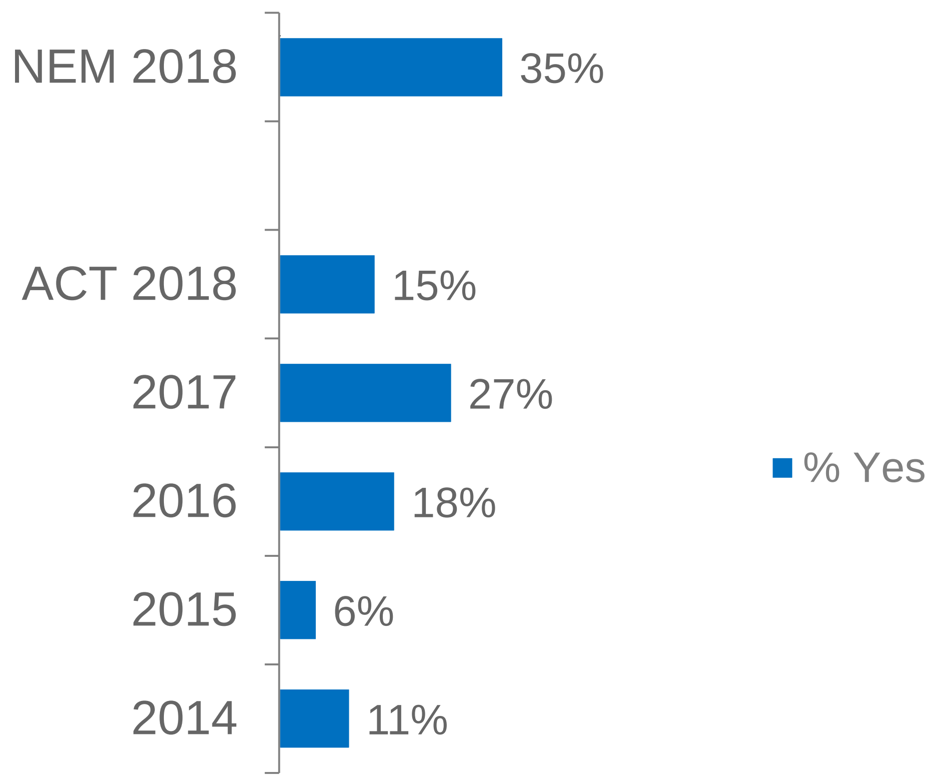


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

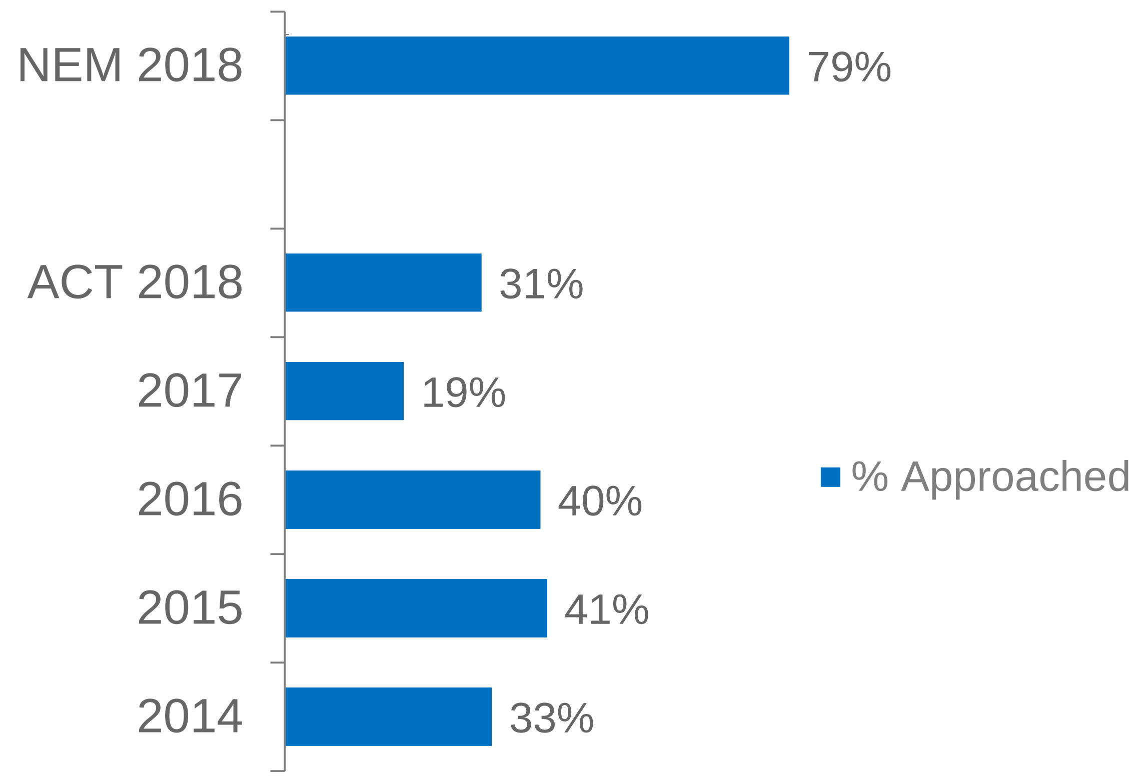
Interaction with alternative energy options / retailers

- A small minority (15%) of ACT businesses in 2018 had actively investigated different energy options, which represented a decrease from 27% in 2017.
- Almost a third (31%) of ACT businesses in 2018 reported that they have been approached by an alternative energy retailer in the last 12 months, representing an increase from 19% in 2017.

Actively investigated different energy options in past 12 months



Approached by alternative energy retailer in last 12 months

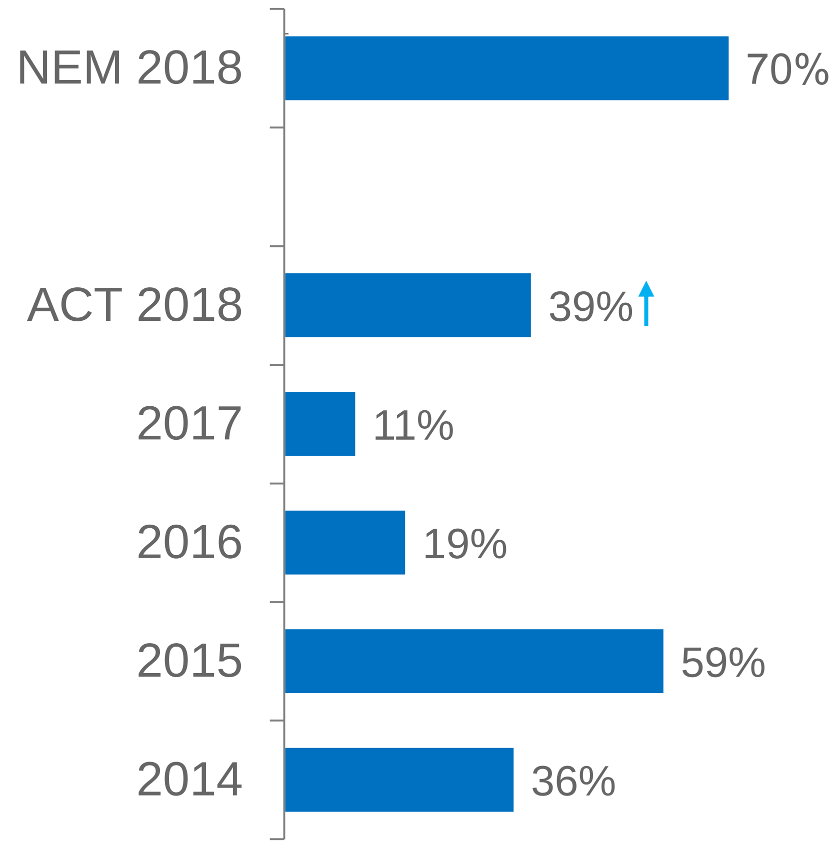


Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants/ECGM participants: 2018 (n=327). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Rates of switching in the last 5 years

- ACT businesses in 2018 were significantly more likely to report that they have switched either their electricity/gas provider or plan in the past 5 years (39% in 2018, compared to 11% in 2017).

Switched anything (gas / electricity company or plan) in the last 5 years.



Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37)

Chapter 2 – 2018 Deep Dive

Introduction

As noted in the Methodology section on page 217, it was originally envisioned that the computer assisted telephone interviewing (CATI) and online samples collected for the study would yield few meaningful differences and thus allow us to merge these into one large data file for time series analysis vs. the 2017 and previous iterations of this study.

Somewhat surprisingly, the preliminary analysis of the responses from both cohorts did reveal a number of meaningful differences in response that were largely attributable to the different data collection methods. This meant that for the purpose of the time series comparison, only the CATI data could be used (given previous waves of the study had also been undertaken using this approach). This data has been analysed and reported on in the previous chapter.

However, rather than waste the online data, the AEMC decided they would like to combine the two data sets to facilitate more of a 'deeper dive' into the 2018 data to explore whether market experiences, knowledge and attitudes varied by key demographic factors including location, size, industry type, turnover level and whether a business operator speaks a language other than English at home.

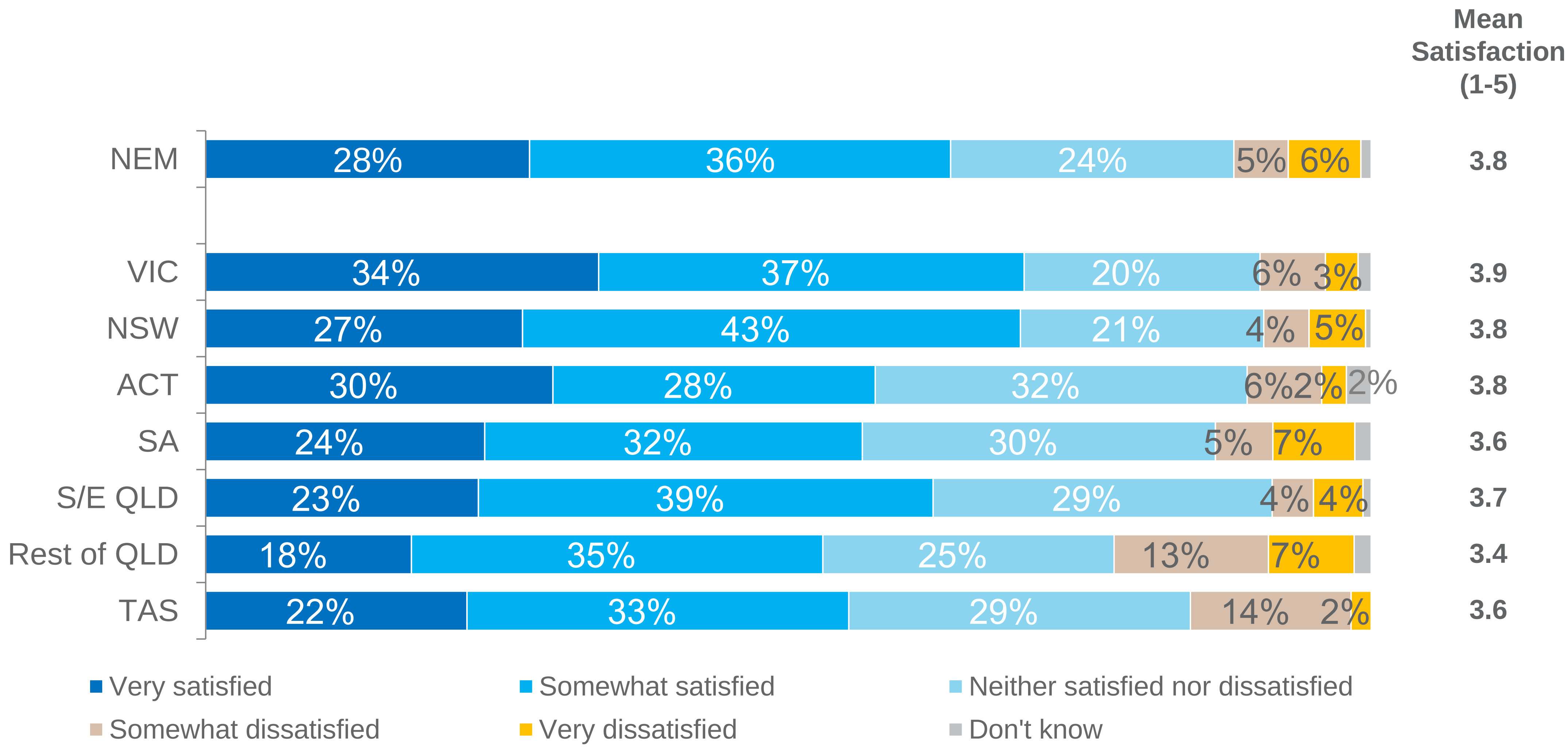
The findings from this separate analysis piece are presented in this chapter. Readers should note that the results will differ from Chapter 1 on the basis of the different bases and weightings applied to the data (Chapter 1 is the CATI data only and is correct for time series comparisons, whereas Chapter 2 allows for greater identification of key differences emerging from the 2018 data only).

It should be noted that in Chapter 2, the NEM figure represents the weighted overall result for each question, whereas the results for business size, location, industry type and turnover are all reported on using the unweighted survey results (this allows for a better comparison on these factors as per our original disproportionate stratified sampling approach).

Satisfaction with current energy providers

Overall satisfaction with current electricity provider

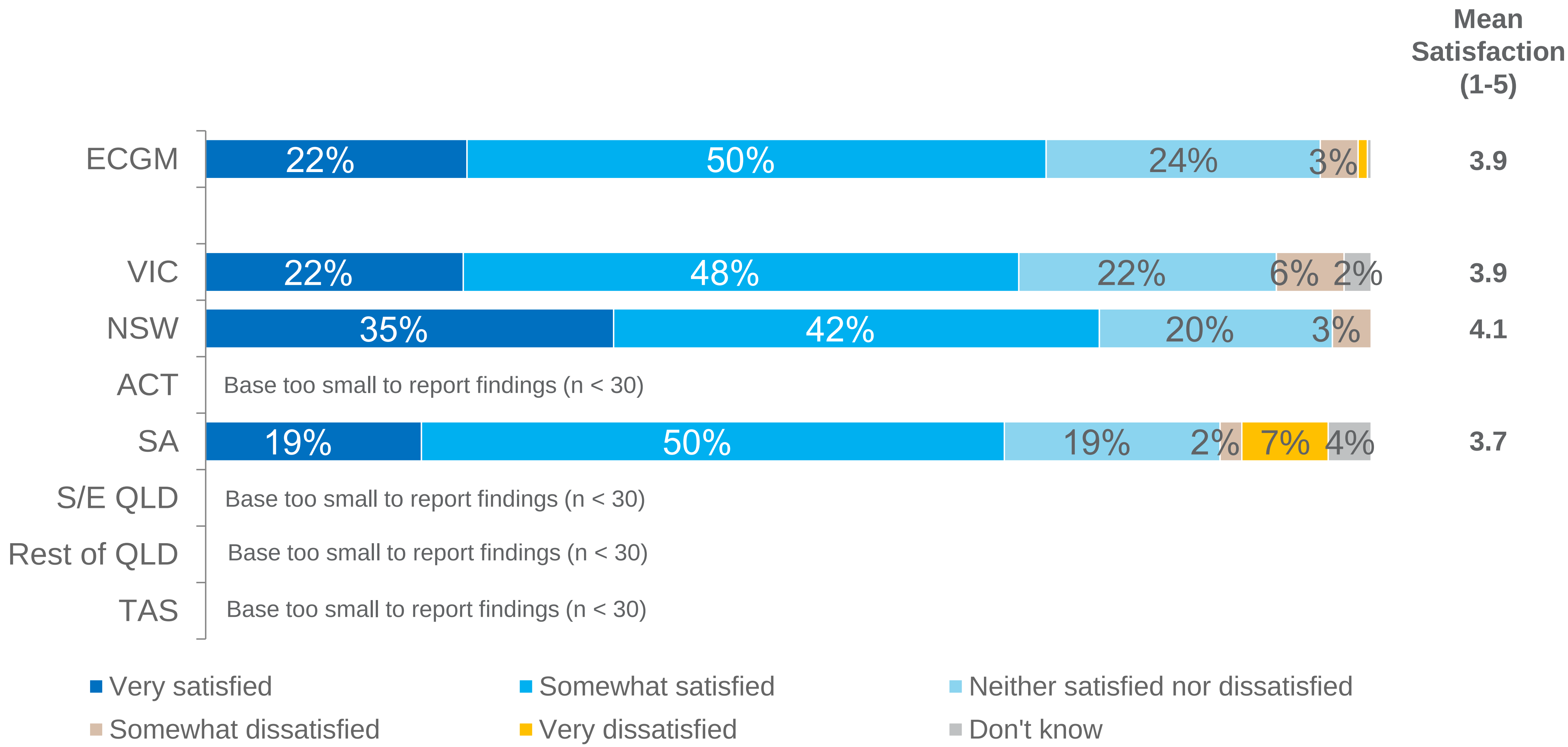
- Mean satisfaction with current electricity provider was broadly consistent across all jurisdictions, ranging from a low of 3.4 in Rest of Qld through to a high of 3.9 in Victoria.
- No statistically significant differences in average satisfaction with electricity providers were observed by location, business size, industry type, turnover or languages other than English spoken.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied'.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Overall satisfaction with current gas provider

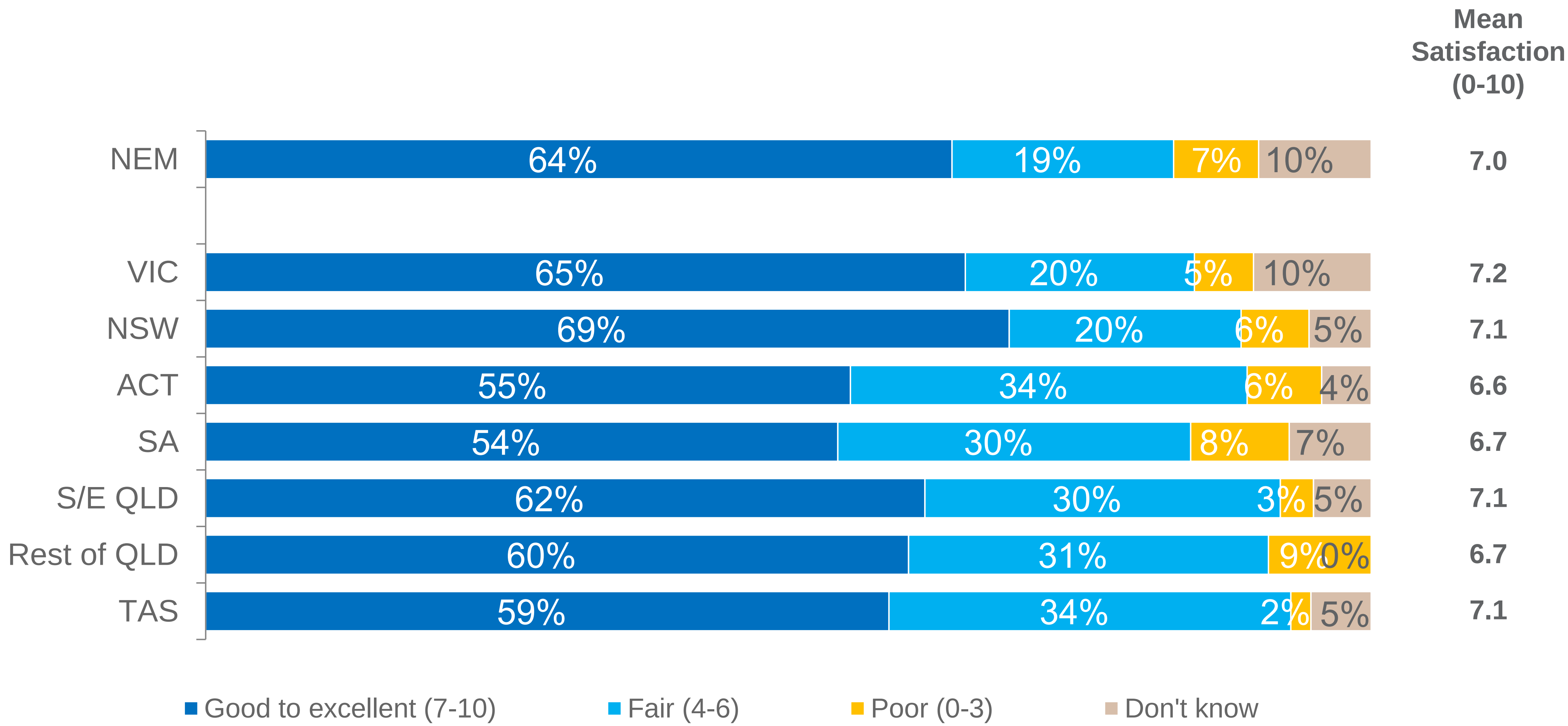
- Mean satisfaction with current gas provider ranged from 3.7 in South Australia through to a high of 4.1 in New South Wales.
- No statistically significant differences in average satisfaction with gas providers were observed by location, business size or industry type, turnover or languages other than English spoken.



Q2. Overall, how satisfied are you with your business's current [electricity / energy] company?
Direction of mean rating: 1 = 'Very Dissatisfied' and 5 = 'Very Satisfied' .
Base: ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Satisfaction with customer service among electricity providers

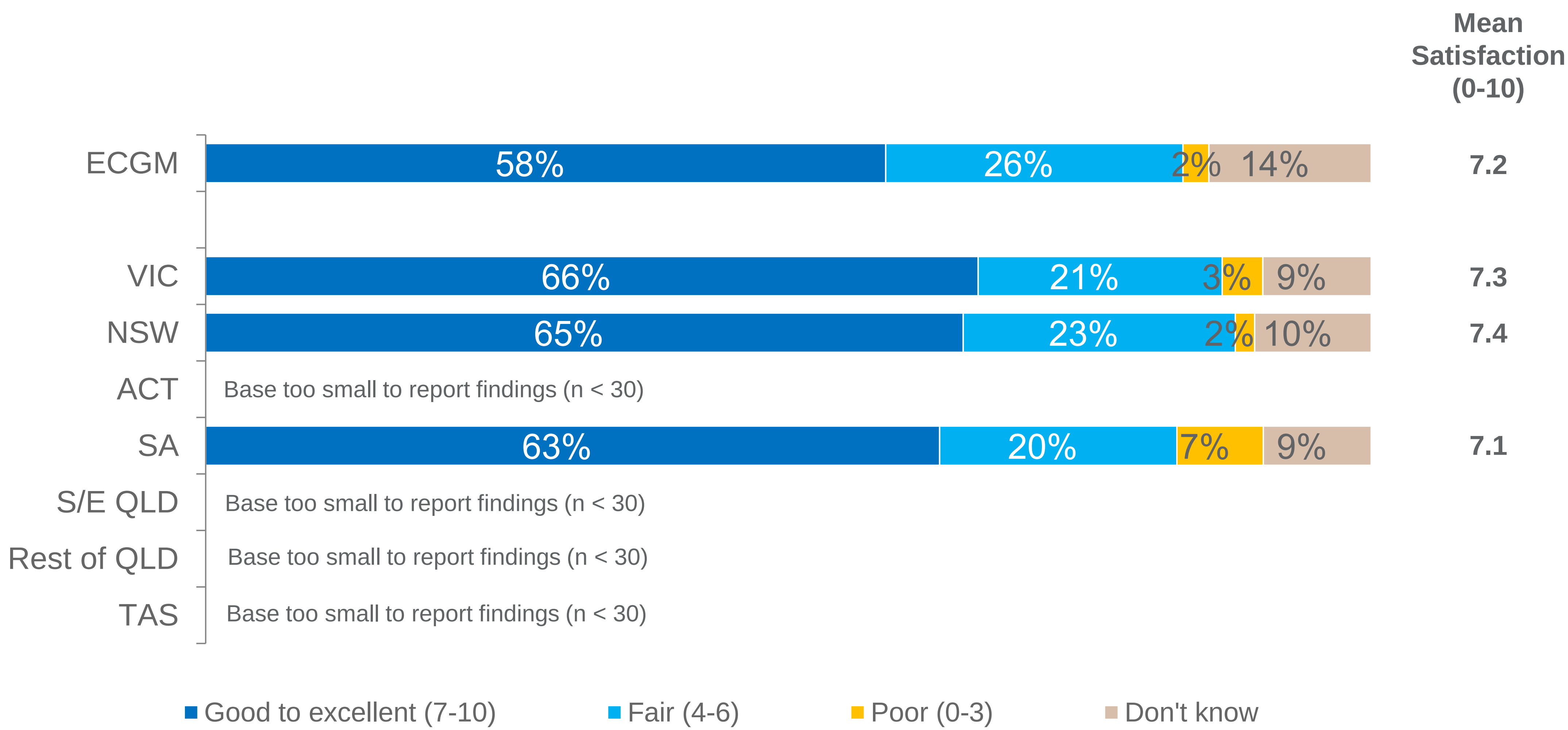
- Average satisfaction with customer service from electricity providers ranged from a low of 6.6 in the ACT to a high of 7.2 in Victoria.
- No statistically significant differences in average customer service satisfaction with electricity providers were observed by location, business size, industry type, turnover or languages other than English spoken.



Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Satisfaction with customer service among gas providers

- Satisfaction with customer service from gas providers was broadly consistent across jurisdictions.
- No statistically significant differences in average customer service satisfaction with gas providers were observed by location, business size, industry type, turnover or languages other than English spoken.



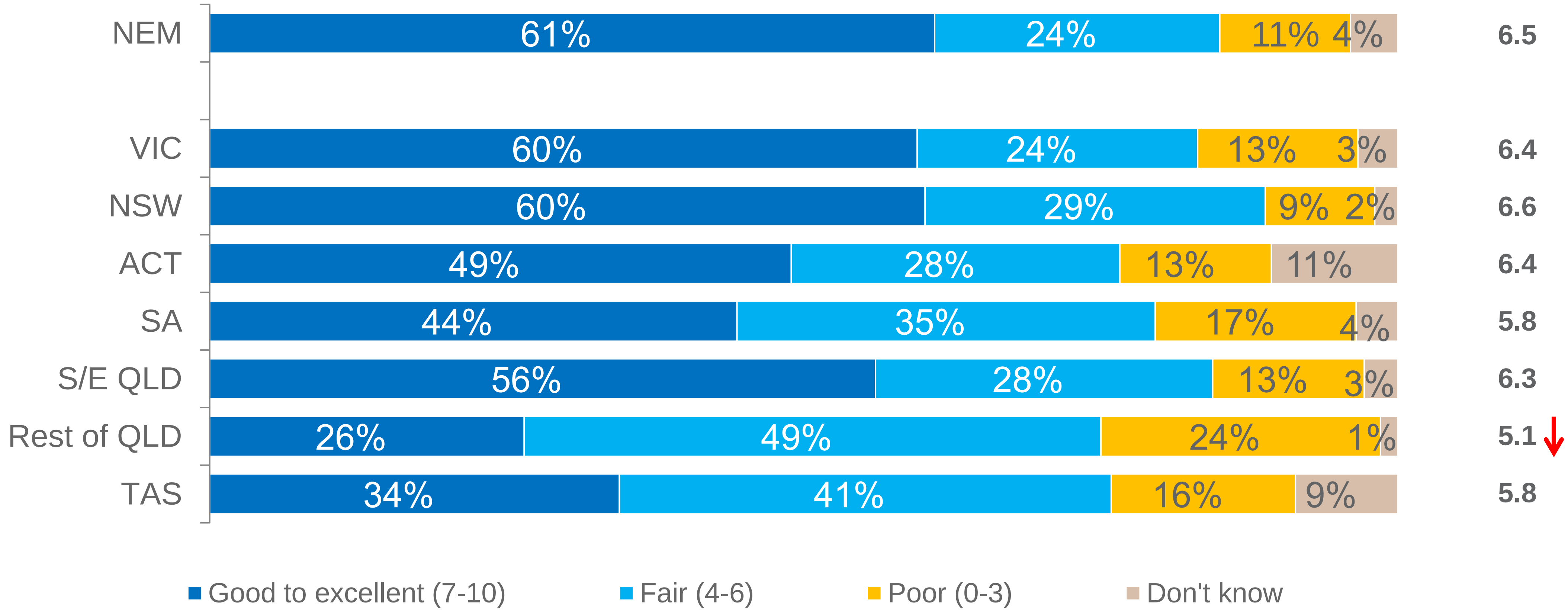
Q3: How would you rate the overall quality of customer service provided by your business's [electricity / energy] company, using the scale below where 0 means very poor and 10 means excellent?
Base: ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

colmar brunton.

Value for money among electricity providers

- Average satisfaction with value for money is significantly lower among businesses outside of the South East corner of Queensland.
- Businesses with an annual turnover of more than $2 million were significantly more likely to rate value for money as only fair (39% of these businesses selected a rating of 4-6 out of 10) than other turnover groups.
- No further statistically significant differences in average value for money ratings among electricity providers were observed by location, business size, industry type or languages other than English spoken.

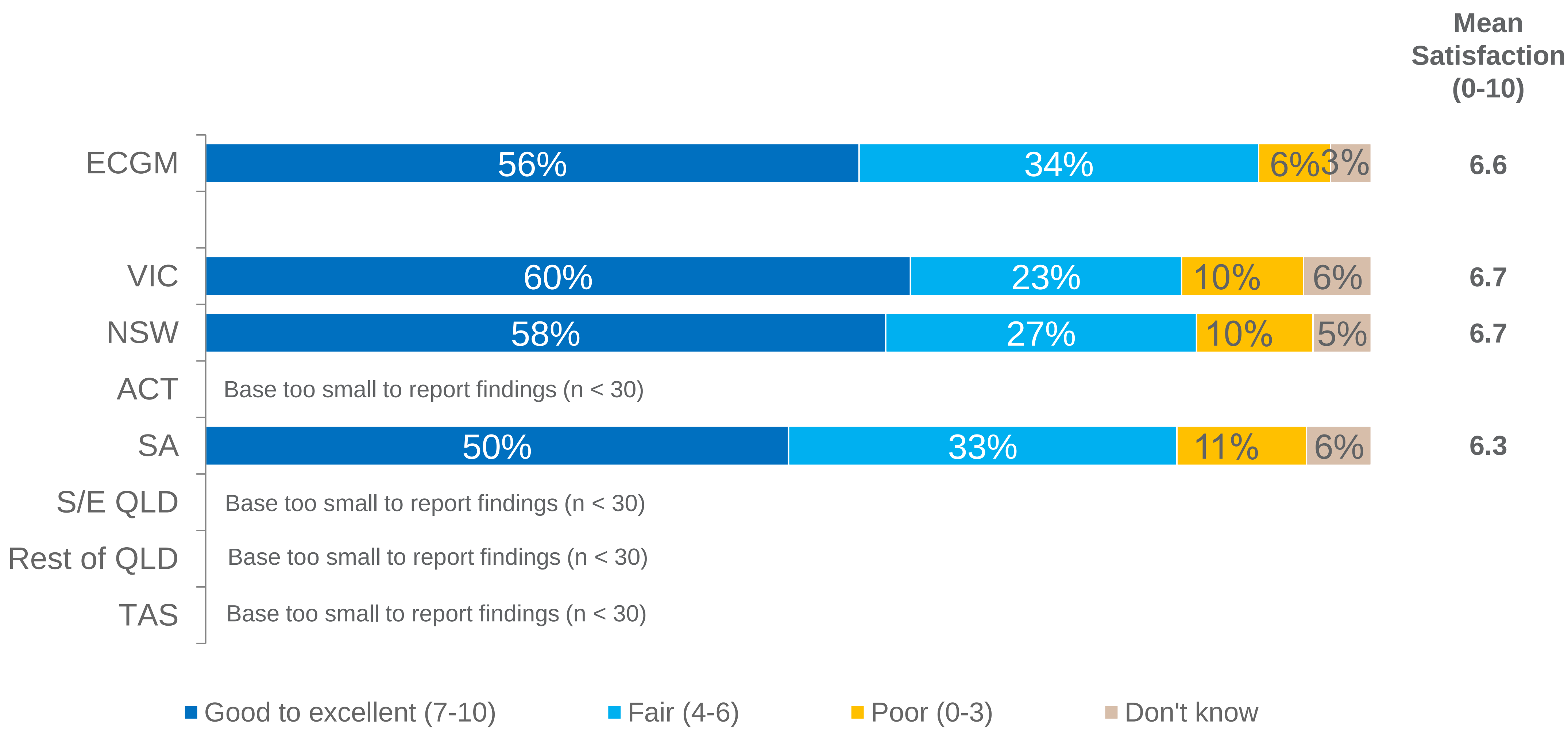
Mean Satisfaction (0-10)



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Value for money among gas providers

- Perceptions of value for money among gas providers was broadly consistent across jurisdictions.
- No statistically significant differences in average value for money ratings among gas providers were observed by location, business size, industry type, turnover or languages other than English spoken.



Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

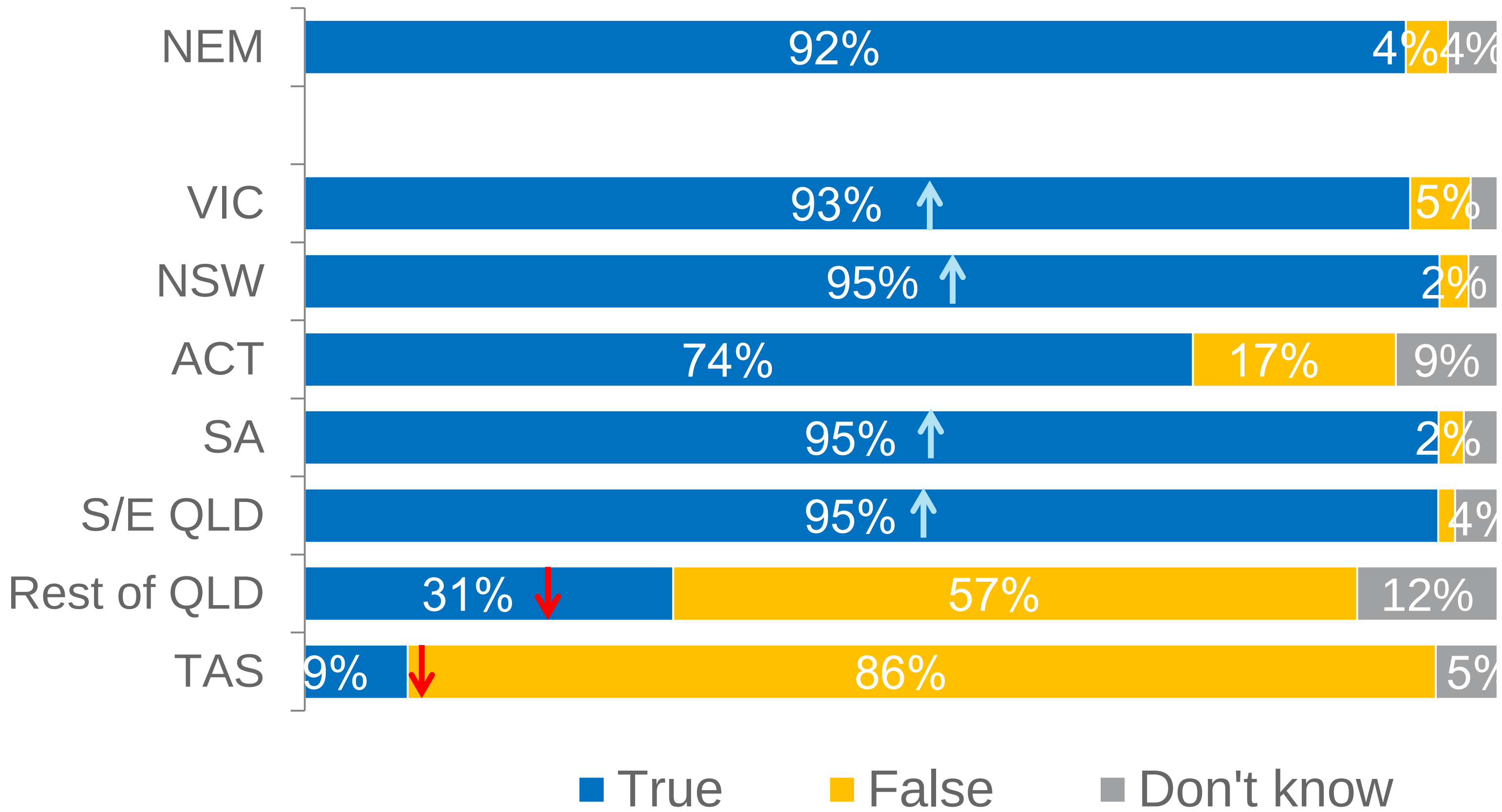
State of competition in the NEM and ECGM

Perceptions of choice

Perceptions of choice – electricity companies

- Knowledge of choice of electricity companies was significantly higher among businesses in metro areas (88% in metro answered ‘True’ compared to 72% in regional), Victoria, New South Wales, South Australia, South East Queensland, and significantly lower among businesses in Queensland outside of South East Queensland and Tasmania. This was broadly consistent with the level of competition within these other states.
- Non-employing businesses were significantly less likely to know whether businesses in their state / territory can choose their electricity company (9% of these businesses answered ‘Don’t know’).
- No statistically significant differences were observed by industry type, turnover or languages other than English spoken.

Businesses in your state/territory can choose their electricity company

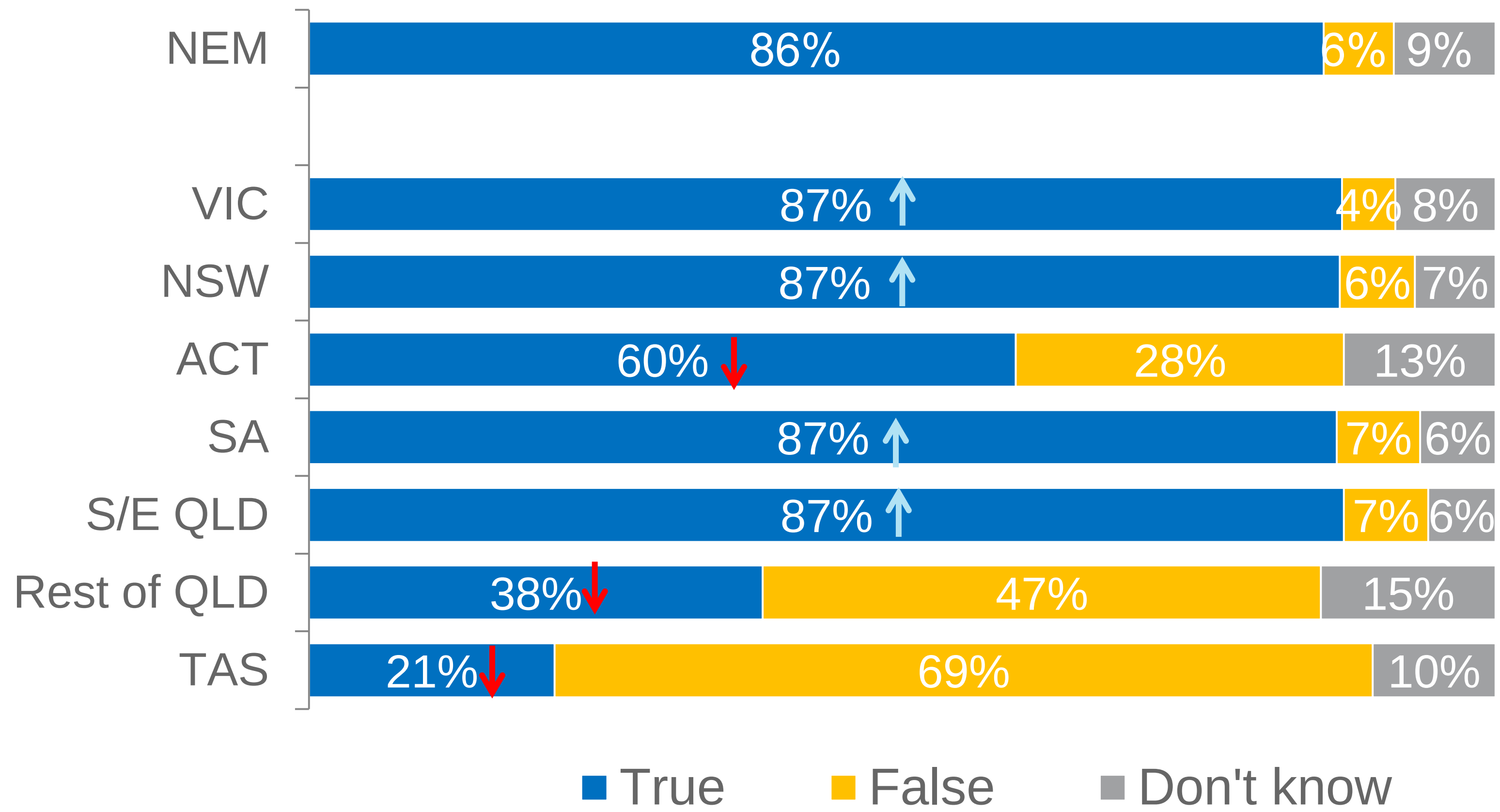


Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Perceptions of choice – electricity plans

- As with the previous question, knowledge of choice of electricity plans was significantly higher among businesses in metro areas (80% in metro areas answered 'True' compared to 72% in regional), Victoria, New South Wales, South Australia, South East Queensland, and significantly lower among businesses in Queensland outside of South East Queensland, Tasmania as well as the ACT.
- Non-employing businesses were significantly less likely to know whether businesses in their state / territory can choose from a range of electricity plans (14% of these businesses answered 'Don't know').
- No statistically significant differences were observed by industry type or languages other than English spoken.

Businesses in your state/territory can choose from a range of different types of electricity plans, price structures, contract lengths and terms

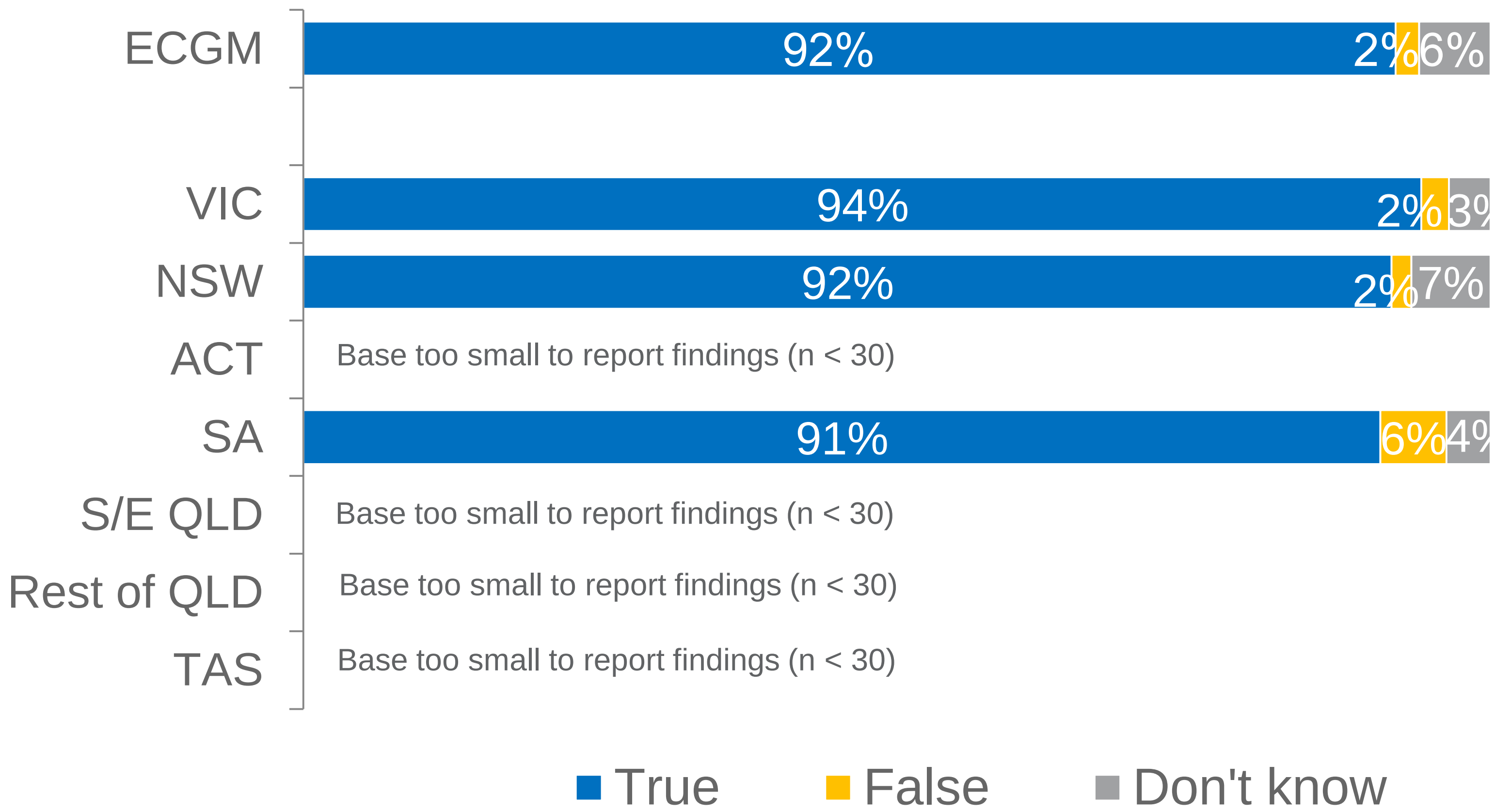


Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Perceptions of choice – gas companies

- Larger businesses (20-199 employees) were significantly more likely to indicate a lack of choice re gas company (17% of these businesses answered ‘False’).
- There were no further statistically significant differences in knowledge of choice of gas companies observed by location, business size, industry type, turnover or languages other than English spoken.

Businesses in your state/territory can choose their gas company

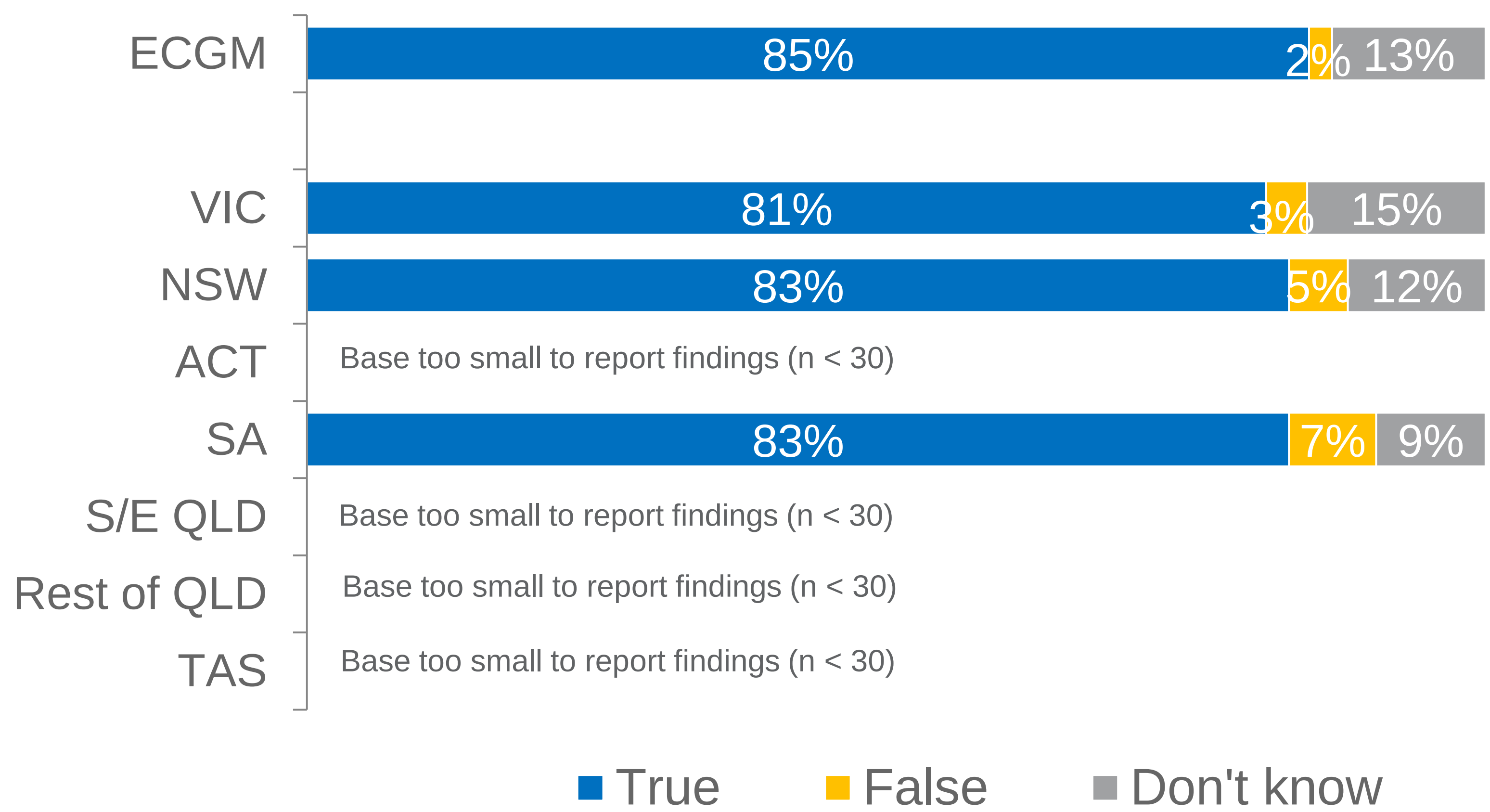


Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Perceptions of choice – gas plans

- Awareness of the choice of different gas plans was broadly consistent across jurisdictions.
- There were no further statistically significant differences observed in knowledge of choice of gas plans observed by location, business size, industry type, turnover or languages spoken other than English.

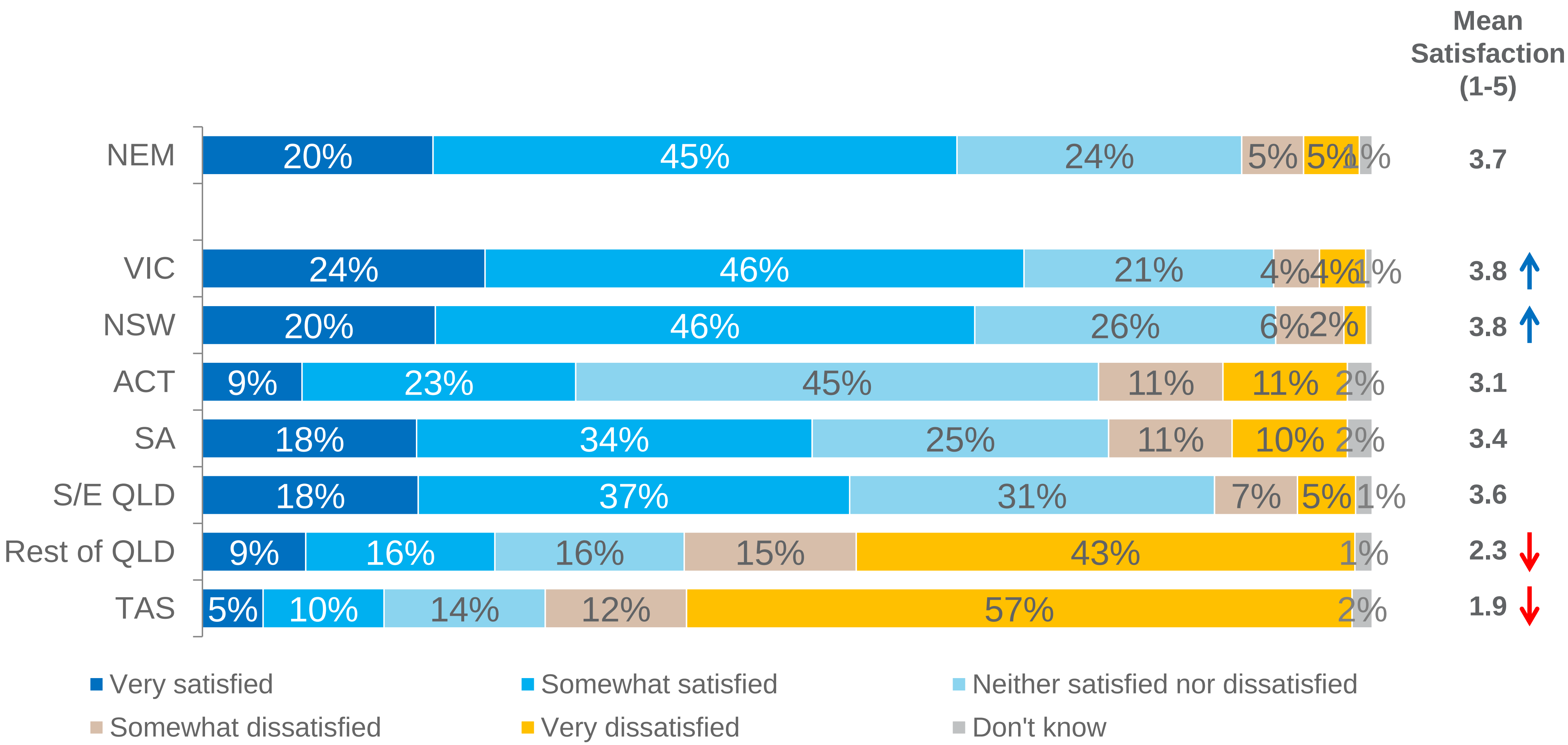
Choice of different types of gas plans, price structures, contract lengths and terms



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Satisfaction with choice of energy companies and plans

- Satisfaction with choice was significantly higher in metro areas (mean of 3.5 compared to 3.2 in regional areas), Victoria and New South Wales. Satisfaction with choice was also significantly higher among businesses in the ‘Administrative and Support Services’ industry type (mean of 3.8).
- Satisfaction with choice was significantly lower in Tasmania and in Queensland (excluding South East Queensland).

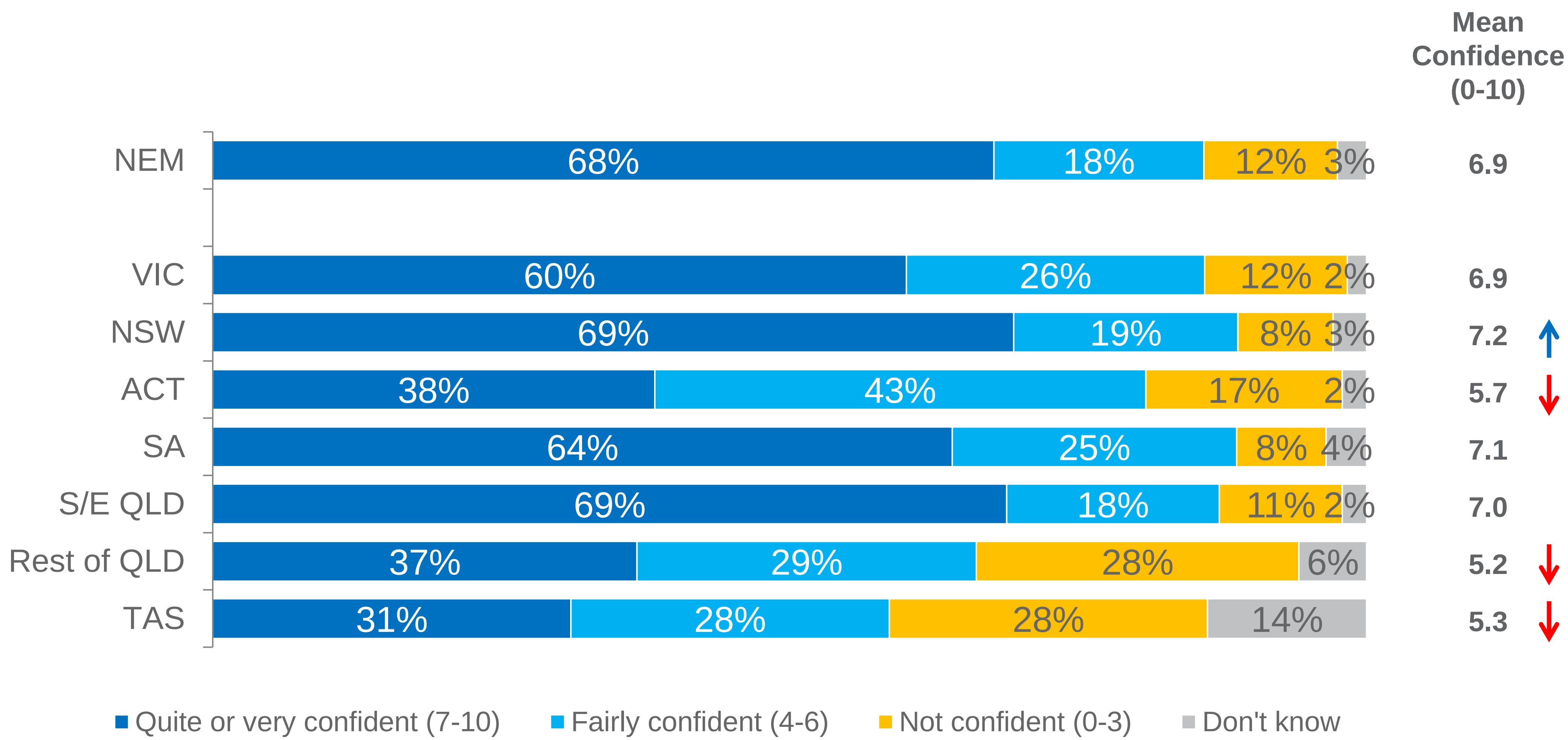


Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Information provision

Confidence in finding the right information to help choose energy plan

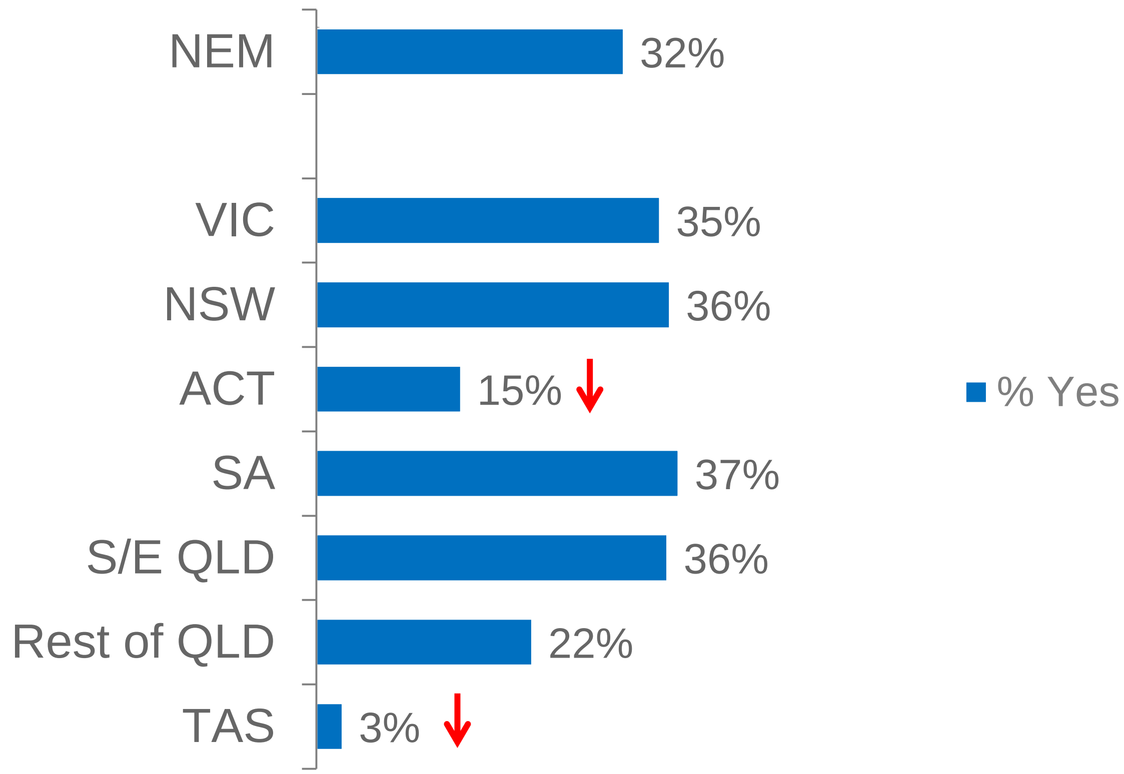
- Confidence in finding the right information to help choose an energy plan was significantly higher in NSW and among larger businesses (mean of 7.2 for businesses with 20-199 employees), but significantly lower in the ACT, Tasmania, QLD (excluding South East Queensland) and small businesses (mean of 6.3 for businesses with 1-4 employees).



Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Actively investigated different energy offers or options in past 12 months

- Active investigation of different energy offers or options was significantly greater among businesses in regional areas (41% compared to 29% for metro based businesses), and in the following industry types: ‘Agriculture, Forestry and Fishing’ (50%) and ‘Wholesale Trade’ (58%).
- Active investigation of different options was significantly lower among businesses in the ACT, Tasmania and in the ‘Professional, Scientific and Technical Services’ industry type (16%).

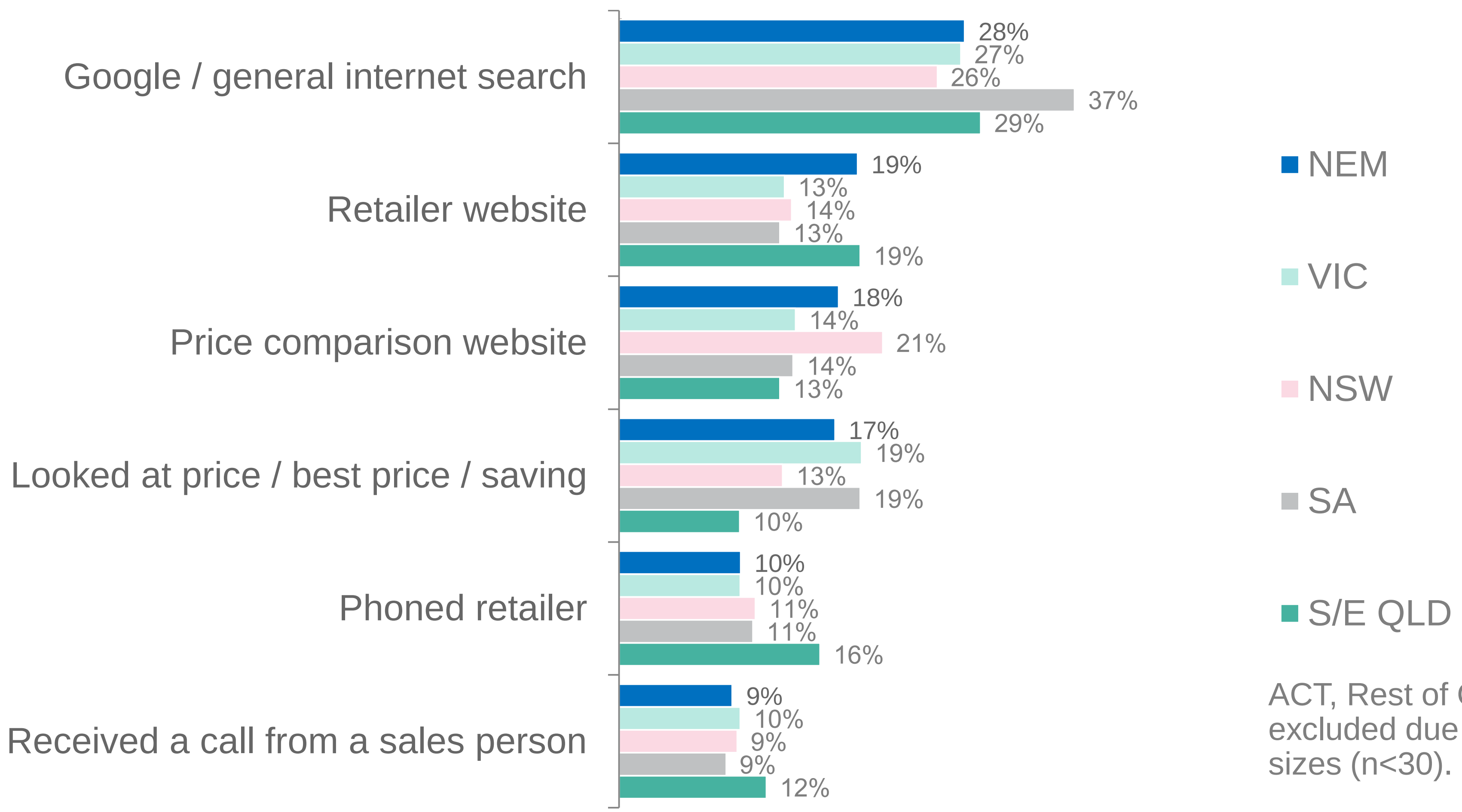


Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?

Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=36); TAS (n=37)

Information sources used for investigation in last 12 months

- No statistically significant differences were observed by location, business size or industry type, turnover or languages other than English spoken.



ACT, Rest of QLD and TAS excluded due to small sample sizes (n<30).

Q23. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation?
Base: Not switched but investigated options in the last 12 months: NEM participants (n=460); VIC (n=113); NSW (n=137); SA (n=93); S/E QLD (n=93).

Unprompted awareness of comparison websites or services

- Businesses in the ACT and Tasmania were significantly less likely to be aware of any comparison websites or services on an unprompted basis. Tasmanian businesses were also significantly less likely to be aware of iSelect specifically.
- Businesses that form part of the 'Professional, Scientific and Technical Services' industry type were significantly more likely to be aware of 'Choice'(4%).

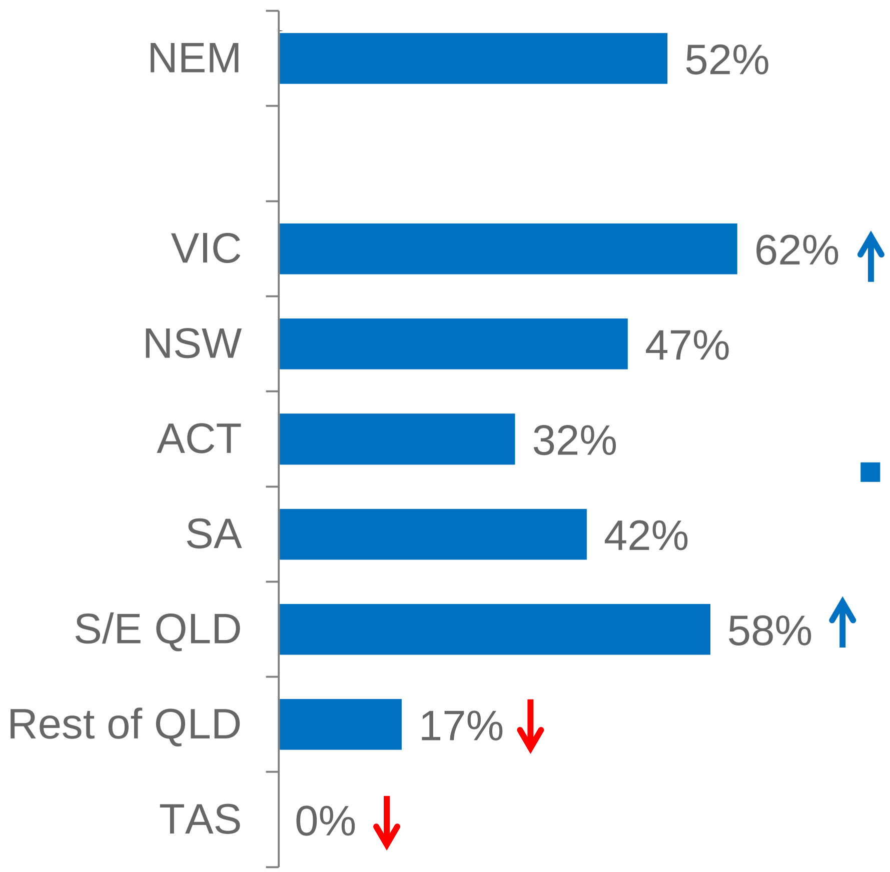
	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Total unprompted awareness (all websites)	46%	51%	48%	19%	49%	50%	25%	14%
iSelect	22%	26%	18%	13%	15%	25%	9%	0%
Compare The Market	17%	17%	17%	4%	19%	17%	6%	3%
Choice	1%	0%	0%	0%	1%	3%	1%	0%
Victorian Energy Compare	1%	2%	0%	0%	1%	0%	0%	0%
Choosi	4%	3%	5%	0%	4%	8%	3%	3%
Energymadeeasy	2%	0%	2%	0%	2%	1%	1%	0%
Energy watch	2%	3%	2%	2%	1%	2%	0%	0%
Make it Cheaper	1%	1%	0%	0%	1%	3%	0%	0%
goswitch	1%	1%	0%	0%	1%	0%	0%	0%
Electricity Wizard	1%	1%	1%	0%	1%	0%	0%	0%
One Big Switch	1%	1%	1%	0%	1%	2%	0%	0%
yourenergy.nsw.gov.au	1%	0%	1%	2%	0%	0%	0%	0%

Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their business? Any others?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

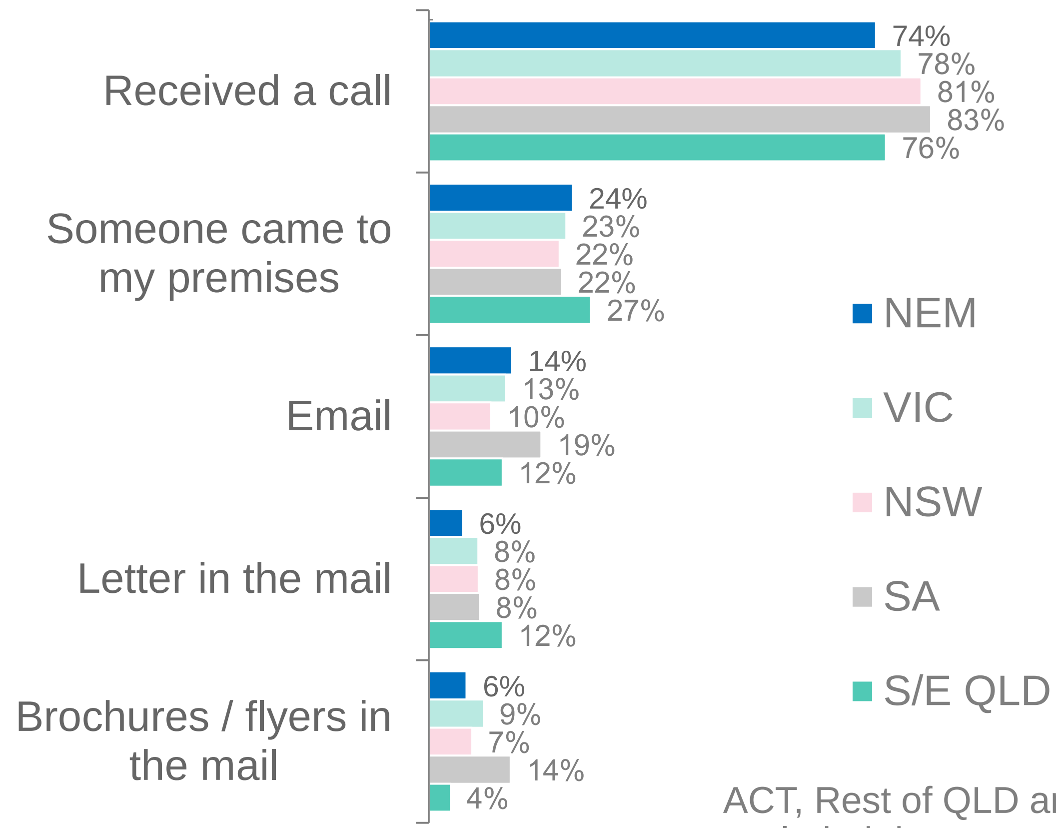
Approached by alternative energy retailer in past 12 months

- Businesses in Victoria and South East Queensland were significantly more likely to have been approached by an alternative energy company in the 12 months prior to the survey, while Queensland businesses outside of South East Queensland and those in Tasmania were significantly less likely to have been approached.
- No further statistically significant differences were observed by location, business size or industry type (including for methods of approach).

Approached



Methods of approach



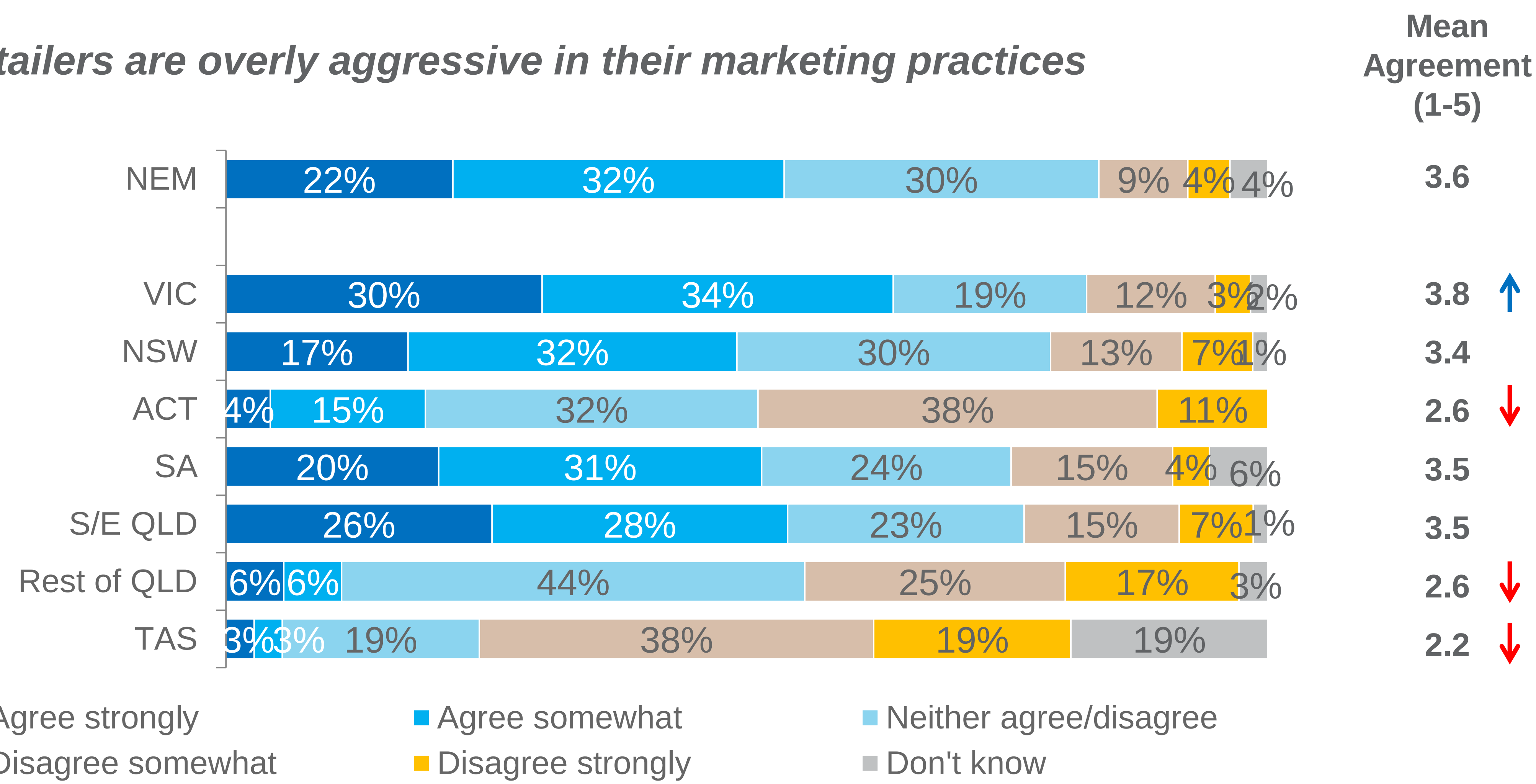
ACT, Rest of QLD and TAS excluded due to small sample sizes (n<30).

Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas? Base: All NEM participants/ECGM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).
Q18B. In what ways was your business approached by an energy company?
Base: Businesses that were approached by an energy company: NEM participants (n=363); VIC (n=110); NSW (n=97); SA (n=59); S/E QLD (n=82).

Marketing and information from energy retailers (new question in 2018)

- Businesses in metro areas (mean of 3.5 compared to 3.2 for regional areas) and Victoria were significantly more likely to agree that energy retailers are overly aggressive in their marketing practices.
- Businesses in the ACT, QLD (excluding SEQ) and Tasmania were significantly less likely to agree with this statement.
- No further significant differences were observed.

Energy retailers are overly aggressive in their marketing practices

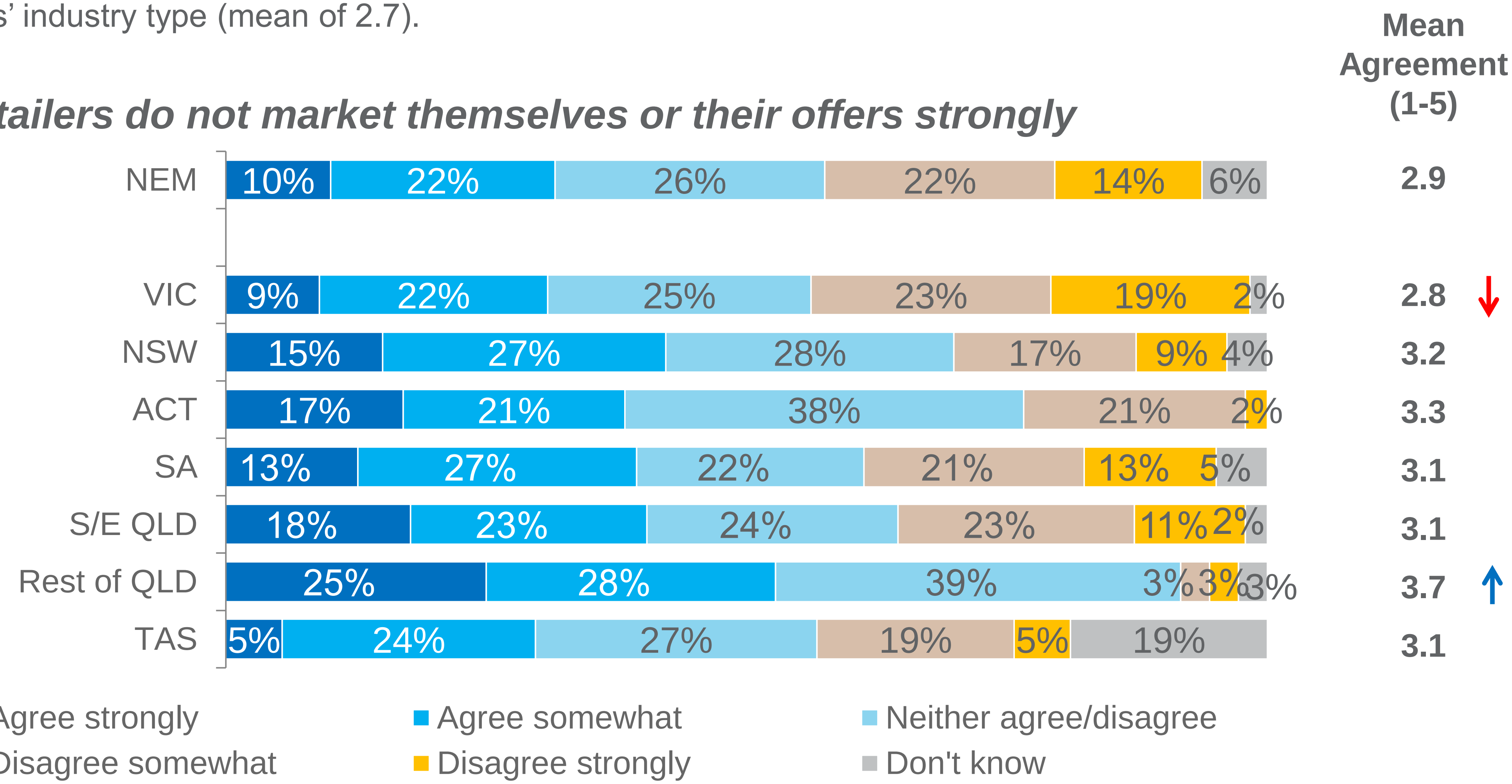


Q18C. Generally speaking, to what extent do you agree or disagree with each of the following statements in relation to marketing and information from energy retailers?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Marketing and information from energy retailers (new question in 2018)

- Businesses in QLD (excluding SEQ) were significantly more likely to agree that energy retailers do not market themselves strongly enough. This is also true for businesses within the ‘Financial and Insurance Services’ industry type (mean of 3.5).
- Businesses in Victoria were significantly less likely to agree that energy retailers do not market themselves strongly enough. This is also true for businesses within the ‘Rental, Hiring and Real Estate Services’ industry type (mean of 2.7).

Energy retailers do not market themselves or their offers strongly enough



Q18C. Generally speaking, to what extent do you agree or disagree with each of the following statements in relation to marketing and information from energy retailers?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

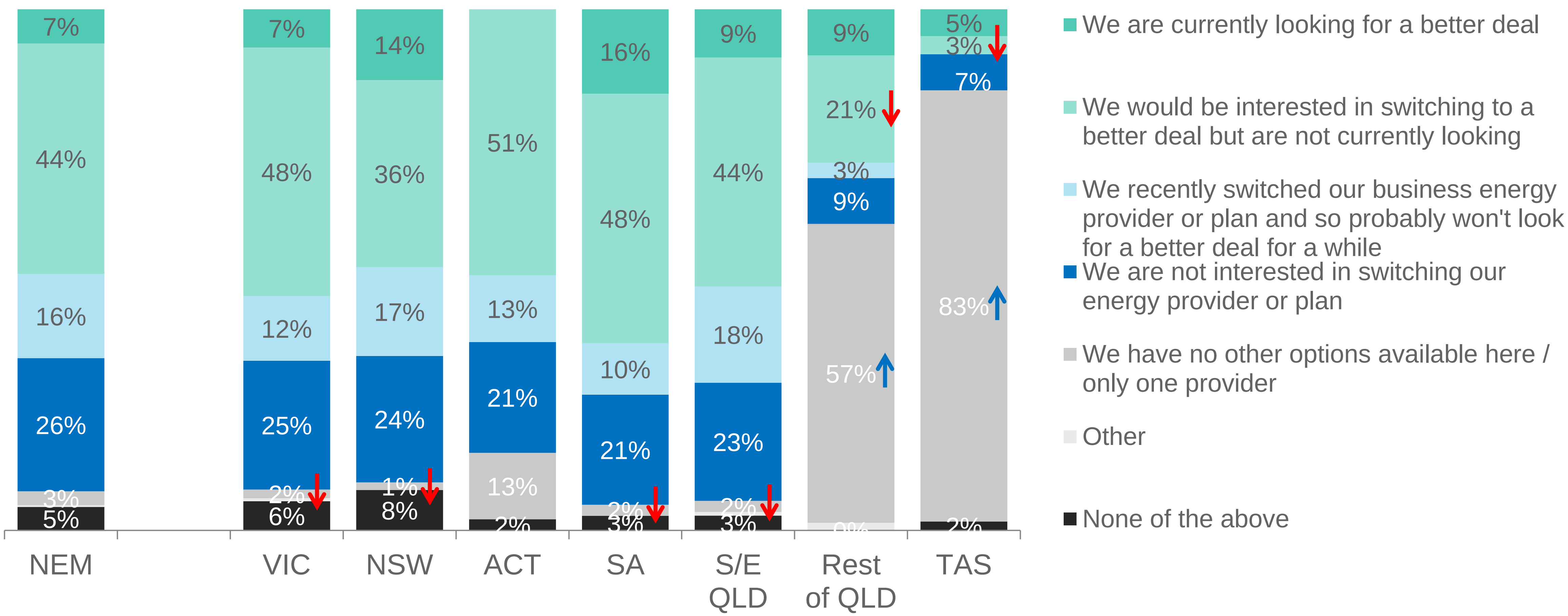
colmar brunton.

Switching behaviours and outcomes

Propensity to switch

Intentions to switch in the future

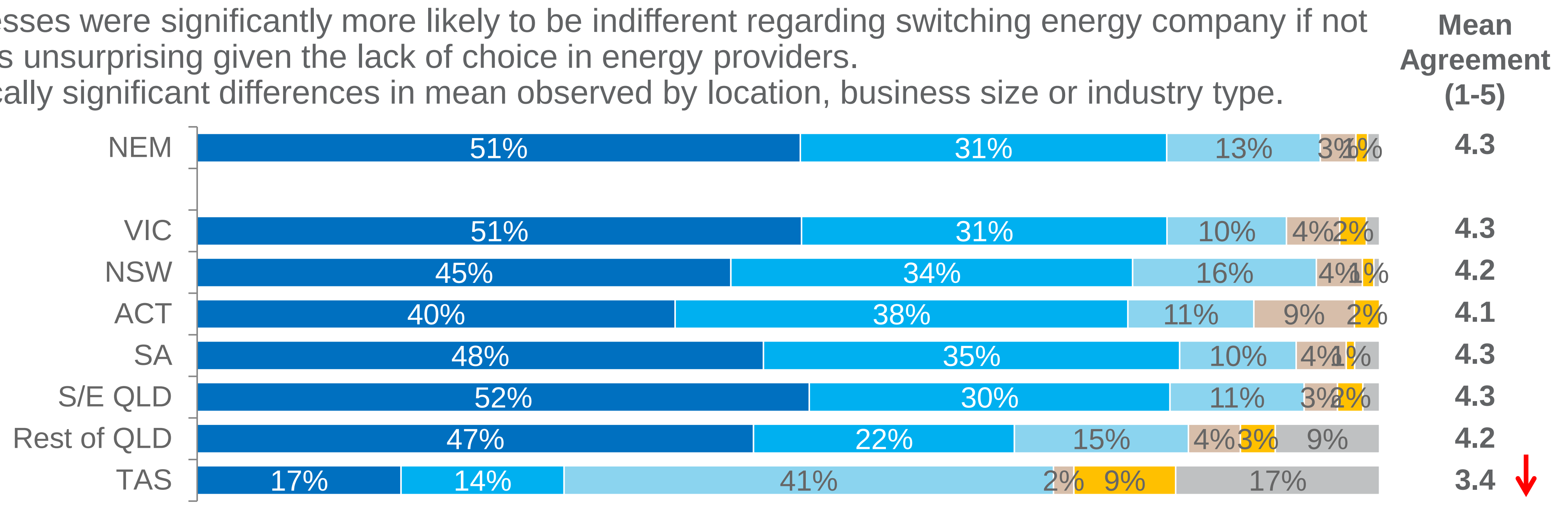
- Switching intentions were broadly similar across the NEM. Businesses in the Rest of Queensland and Tasmania were both less likely to be looking to switch and more likely to report that they have no options/only one provider in their region.
- Metro based businesses were significantly more likely to state they would be interested in switching but are not currently looking (43% compared to 31% for regional based businesses). Regional businesses were more likely to answer that they have no other options here/only one provider (25% compared to 6% for metro based businesses).



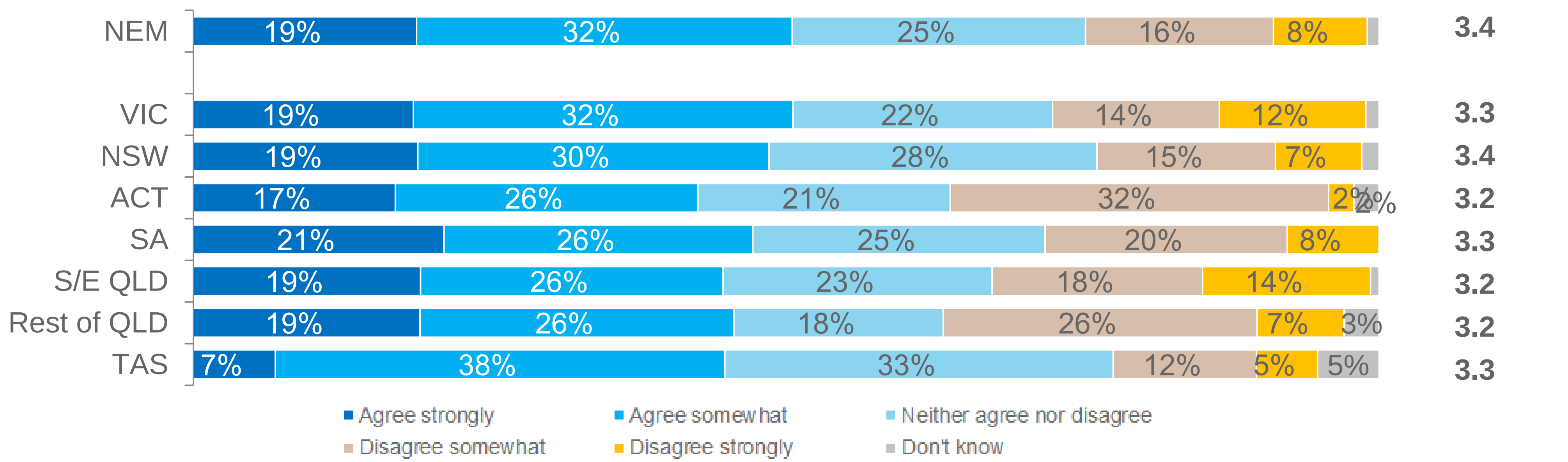
Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Attitudes towards switching (1/4)

- Tasmanian businesses were significantly more likely to be indifferent regarding switching energy company if not satisfied – perhaps unsurprising given the lack of choice in energy providers.
- No further statistically significant differences in mean observed by location, business size or industry type.



- Businesses that form part of the 'Rental, Hiring and Real Estate Services' industry type (mean of 3.8) were significantly more likely to indicate a preference to save energy rather than seek out a better deal.
- No further statistically significant differences in mean observed by location, business size or industry type.



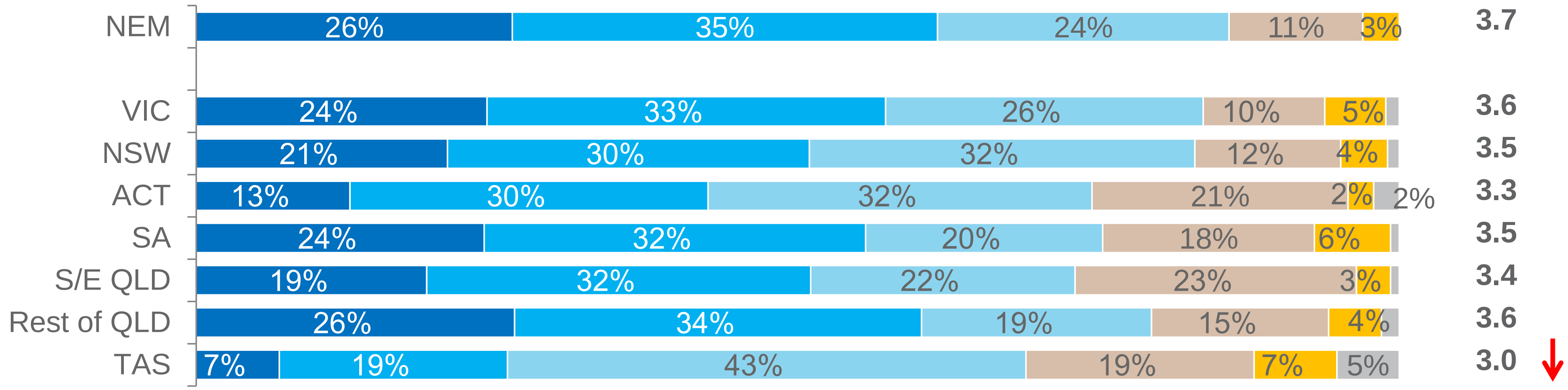
Q59. Do you agree or disagree with the following statements?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Attitudes towards switching (2/4)

- Tasmanian businesses showed less agreement with the proposition that they generally do not trust energy companies that offer a better deal – possibly because limited competition means they get fewer such offers.
- No further statistically significant differences in mean agreement observed by location, business size or industry type.

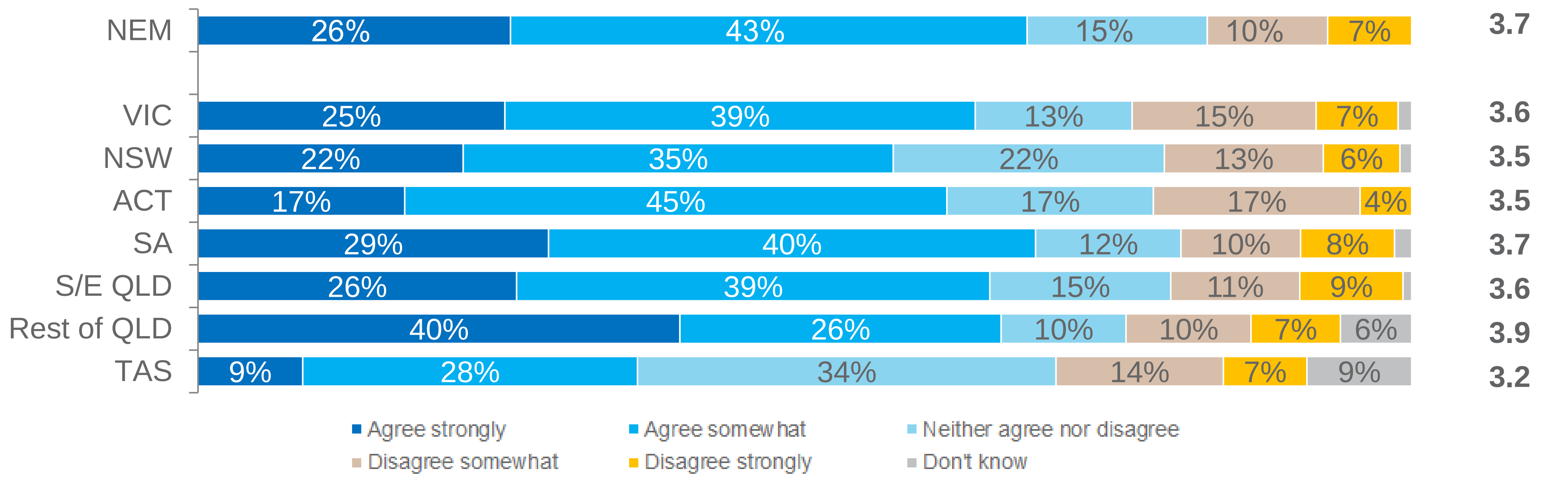
Mean Agreement (1-5)

I generally don't trust energy companies that promise a better deal.



- No statistically significant differences in mean agreement observed by location, business size or industry type.

I'm concerned that if I switch energy company of plan there might be hidden fees and charges.



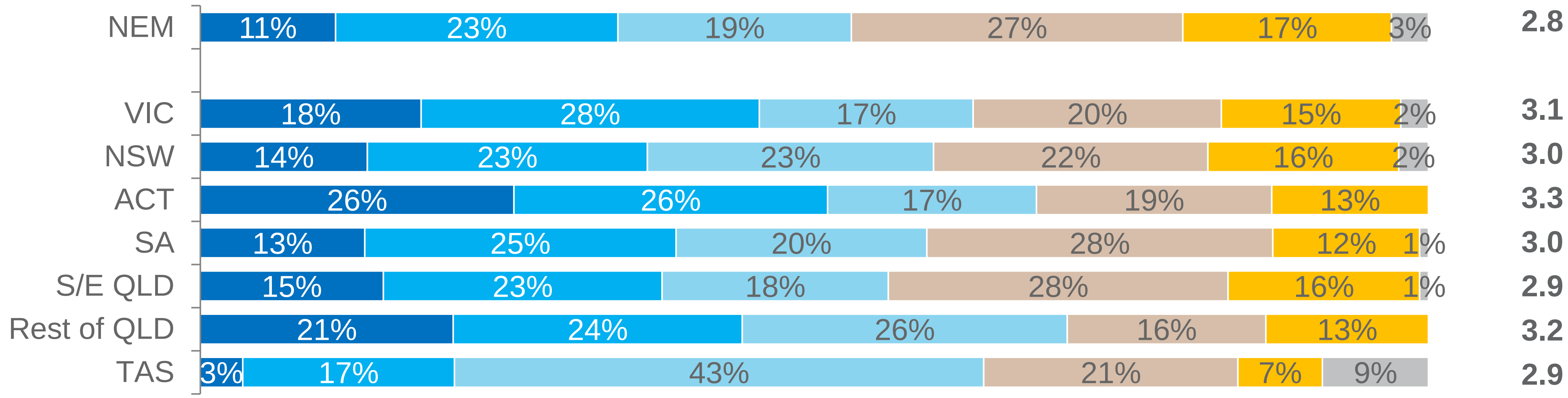
Q59. Do you agree or disagree with the following statements?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Attitudes towards switching (3/4)

Mean Agreement (1-5)

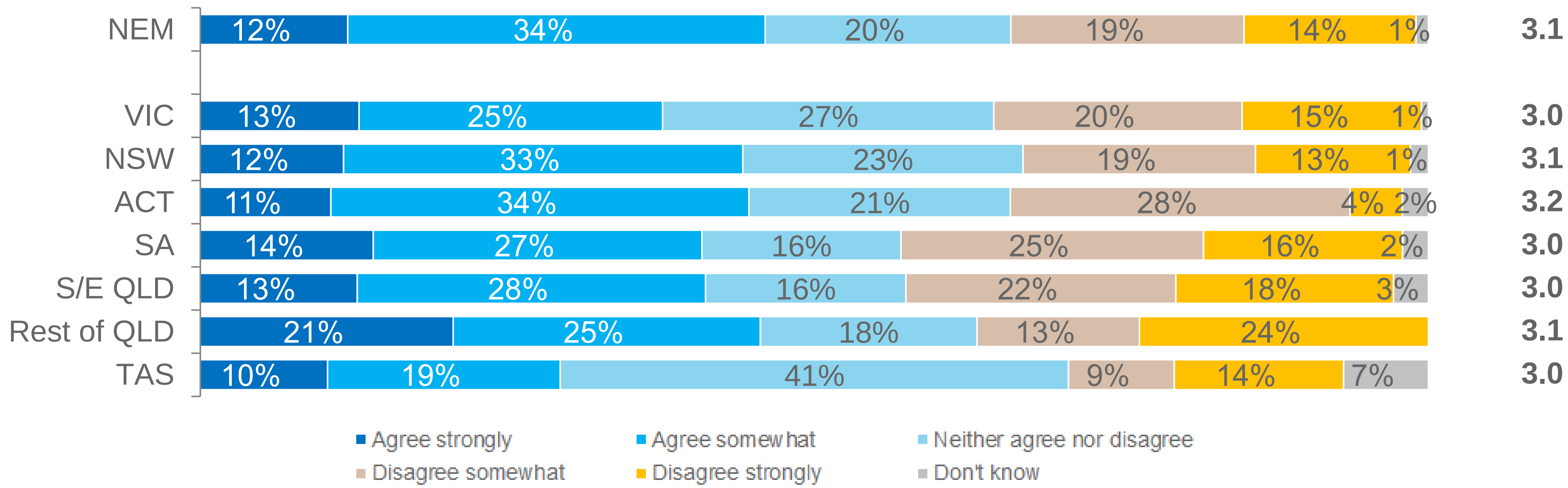
- No statistically significant differences in mean observed by location, business size or industry type.

I require help in assessing the best energy deal for my business.



- No statistically significant differences in mean observed by location, business size or industry type.

The amount of money I could save is not worth the time and effort involved in switching.



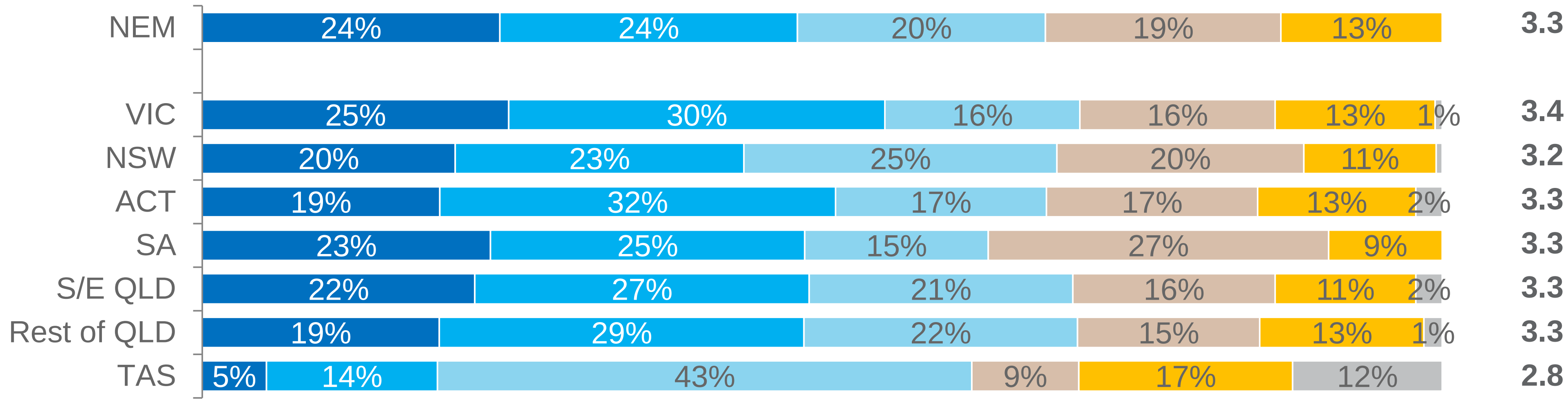
Q59. Do you agree or disagree with the following statements?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Attitudes towards switching (4/4)

Mean Agreement (1-5)

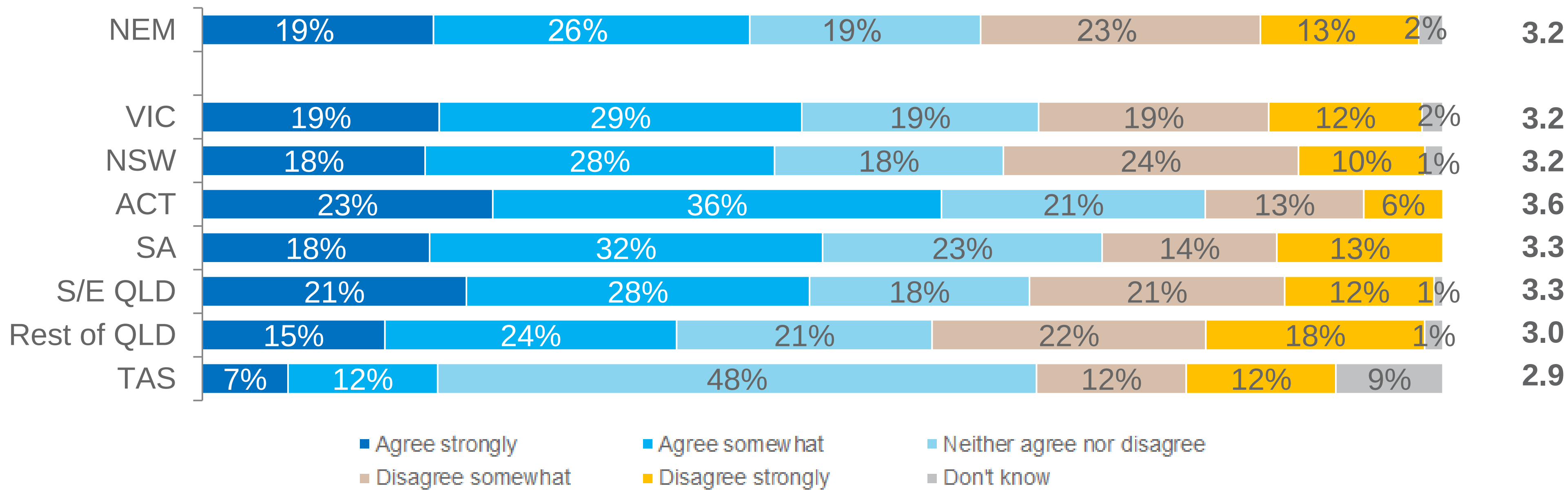
- No statistically significant differences in mean observed by location, business size or industry type.

It is too complicated to try and compare the various options and offers available.



- No statistically significant differences in mean observed by location, business size or industry type.

I don't have the time or energy to think about switching.



Q59. Do you agree or disagree with the following statements?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Switching behaviours

Rates of switching in the last 5 years

- Businesses in regional areas were significantly more likely to have changed energy company or plan in the last 5 years (‘switched anything’) (65% for regional compared to 52% for metro).
- No further statistically significant differences in switching were observed by location, business size, industry type, turnover or language spoken other than English.

	NEM	VIC	NSW	ACT	SA	S/E QLD
Electricity company	42%	45%	40%	26%	43%	37%
Electricity plan	38%	35%	39%	30%	35%	33%
TOTAL Electricity Company and/or Plan	59%	58%	57%	43%	57%	53%
TOTAL Electricity or GAS Company and/or Plan	59%	58%	57%	43%	58%	53%
Consumers with mains gas	**ECGM**	**VIC**	**NSW**	**ACT**	**SA**	**S/E QLD**
Gas company	26%	33%	28%	-	28%	-
Gas plan	20%	19%	23%	-	22%	-
TOTAL Gas Company and/or Plan	34%	36%	35%	-	35%	-

- *Tasmania and ‘Rest of QLD’ were not asked this question.*
- *ACT and SE/QLD gas results excluded due to small sample size (n < 30)*

Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants (n=712); VIC (n=178); NSW (n=205); ACT (n=47); SA (n=141); S/E QLD (n=141). ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Rates of switching in the last 12 months

- The rate of switching energy providers over the past 12 months was broadly similar across jurisdictions (albeit slightly lower in the ACT).
- No statistically significant differences were observed by location, business size or industry type, turnover or languages other than English spoken.

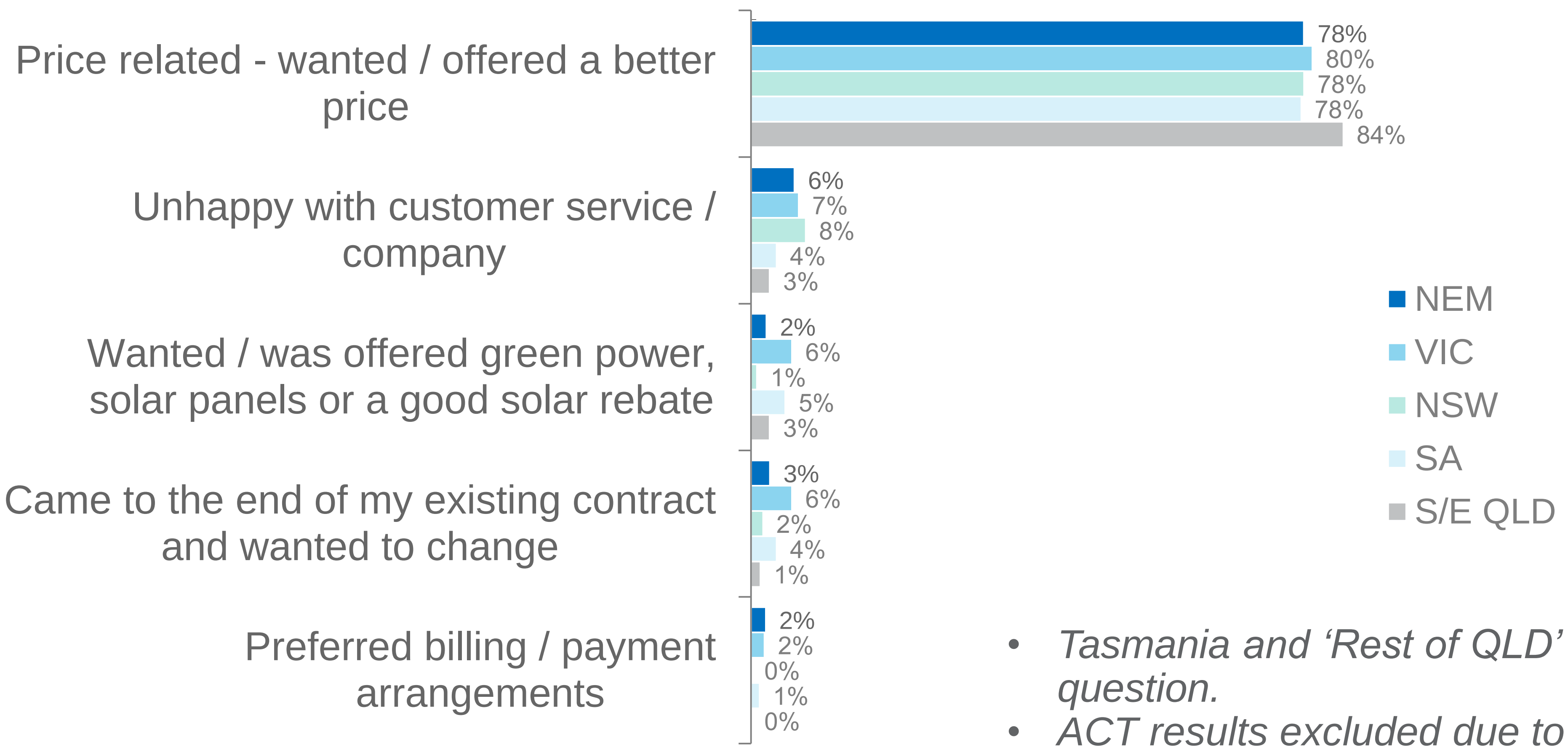
	NEM	VIC	NSW	ACT	SA	S/E QLD
Electricity company	22%	20%	17%	15%	20%	19%
Electricity plan	22%	16%	20%	6%	18%	17%
TOTAL Electricity Company and/or Plan	35%	29%	32%	17%	33%	32%
TOTAL Electricity or GAS Company and/or Plan	36%	30%	33%	17%	33%	32%
Consumers with mains gas	**ECGM**	**VIC**	**NSW**	**ACT**	**SA**	**S/E QLD**
Gas company	15%	16%	10%	-	15%	-
Gas plan	13%	7%	15%	-	11%	-
TOTAL Gas Company and/or Plan	22%	20%	20%	-	19%	-

- *Tasmania and 'Rest of QLD' were not asked this question.*
- *ACT and SE/QLD gas results excluded due to small sample size (n < 30)*

Q17. In the past 12 months, how many times has your business changed the following?
Base: All NEM participants (n=712); VIC (n=178); NSW (n=205); ACT (n=47); SA (n=141); S/E QLD (n=141). ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Reasons for switching (unprompted)

- Businesses in the ‘Administrative and Support Services’ industry type were significantly less likely to switch in the last 5 years due to price (40% of these businesses answered ‘Price related – wanted / offered a better price’).
- No further statistically significant differences in reasons for switching have been observed by location, business size or industry type.



- *Tasmania and ‘Rest of QLD’ were not asked this question.*
- *ACT results excluded due to small sample size (n < 30)*

Q22. The last time you switched, what was the main reason you changed your business’ energy company, plan or deal? Any other reasons?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75)

Importance of factors in past switching
(Mean comparisons)

- ‘Brand and reputation of the company’ was significantly more important for businesses in the ‘Wholesale Trade’ industry (mean of 7.7).
- Businesses in metro areas were significantly more likely to rate the following factors as important in driving past switching: ‘the company offered an upgraded meter’ (4.3 compared to 3.2 for regional) and ‘bonus rewards such as gym memberships, frequent flyer points or shopping vouchers’ (3.3. compared to 2.2 for regional).
- Business operators that speak a language other than English gave a significantly higher average importance rating for ‘availability of green/renewable energy plans’ (mean of 6.8), ‘the ability to purchase or access technologies such as solar panels, energy storage batteries, live energy use data or energy management systems’ (mean of 6.5) and ‘the company offered an upgraded meter’ (mean of 5.4) than those who speak English only.

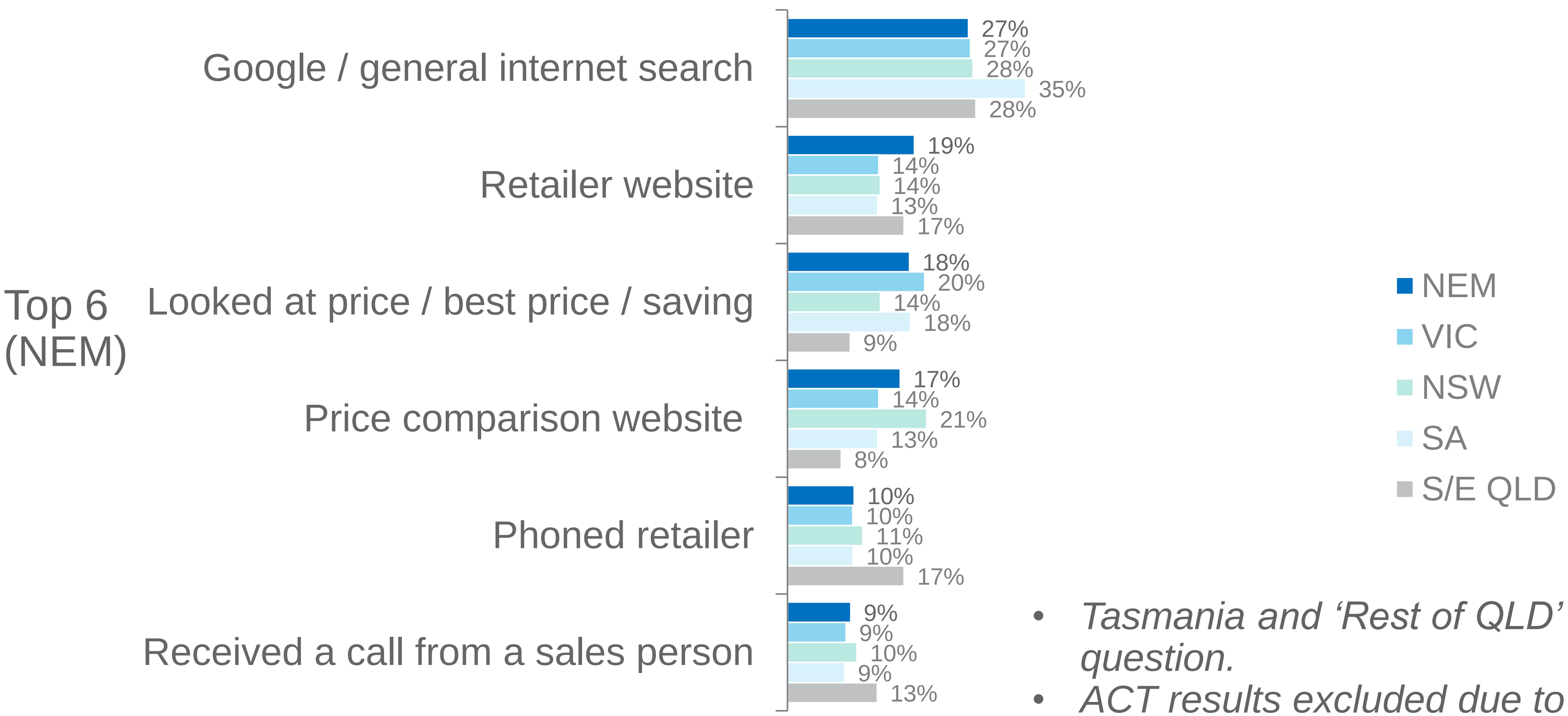
Mean Importance (0-10)	NEM	VIC	NSW	SA	S/E QLD
The estimated total bill amount	8.2	8.4	8.1	8.2	8.4
The discounts offered	8.6	8.2	8.5	8.0	8.6
Whether the price can change during the contract	7.5	7.4	7.6	7.8	7.9
The customer service on offer	7.1	7.3	6.6	6.5	6.7
Whether you are locked into a contract	6.4	6.4	6.5	6.8	6.8
The brand and reputation of the company	6.2	6.0	5.6	6.2	6.2
The solar feed-in tariff offered by the company	4.2	4.9	4.4	6.0	5.6
Availability of green / renewable energy plans	4.2	5.5	4.2	5.7	4.8
The ability to purchase or access technologies such as solar panels, energy storage batteries, live energy use data or energy management systems	4.0	5.2	3.8	5.3	4.5
The company offered an upgraded meter	3.6	3.6	3.7	4.4	4.4
Bonus rewards such as gym memberships, frequent flyer points or shopping vouchers	2.7	3.0	2.8	3.6	2.8

- *Tasmania and ‘Rest of QLD’ were not asked this question.*
- *ACT results excluded due to small sample size (n < 30)*

Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business’s energy company, plan or deal where 0 means not at all and 10 means extremely important?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75)

Information sources used when switching

- The information sources used when considering switching were broadly similar across all jurisdictions.
- No statistically significant differences were observed by location, business size or industry type, turnover or languages other than English spoken.

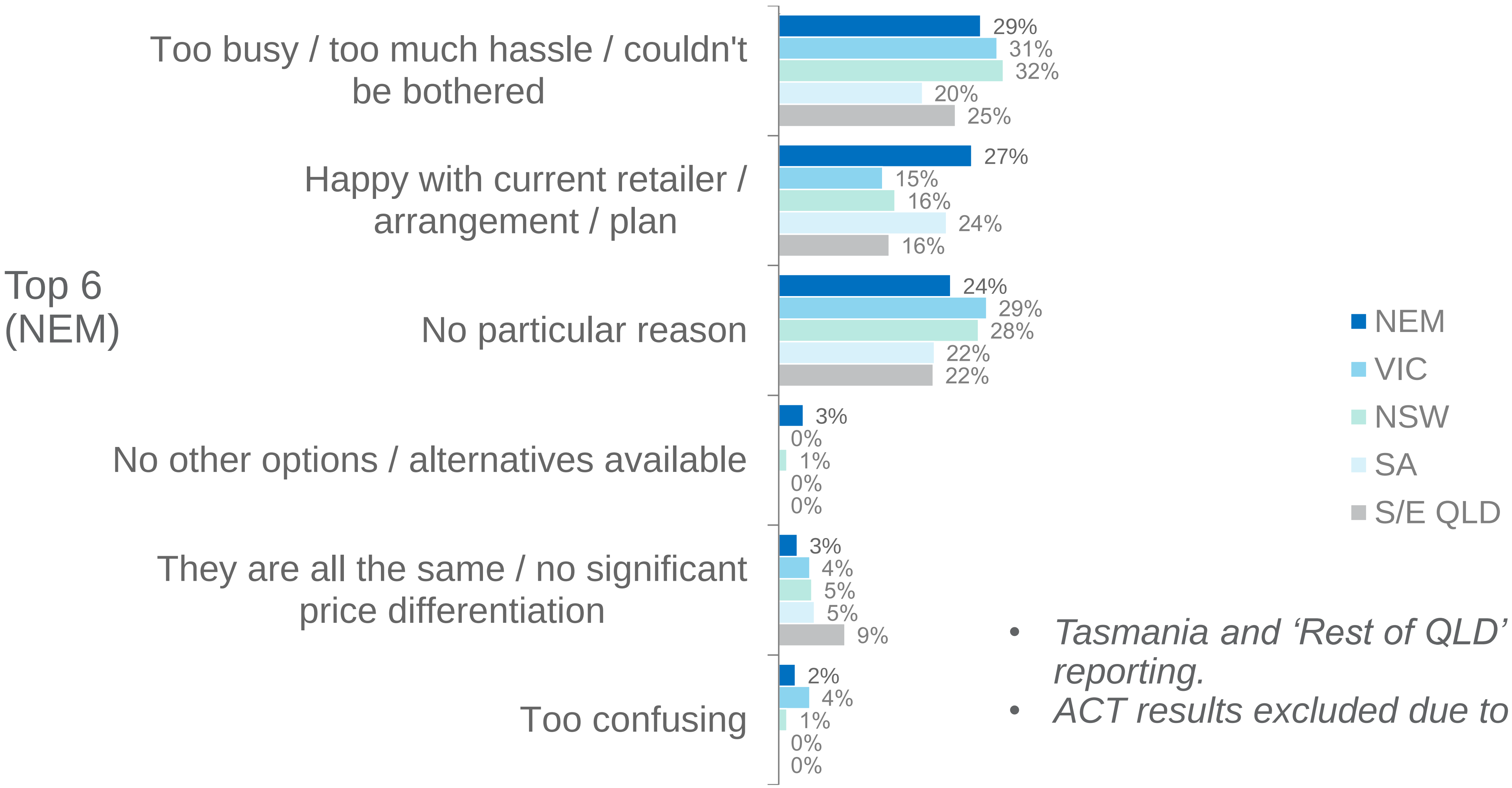


- *Tasmania and ‘Rest of QLD’ were not asked this question.*
- *ACT results excluded due to small sample size (n < 30)*

Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? Any others?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75)

Reasons for not switching

- Businesses with an annual turnover of less than $200,000 per annum were significantly more likely to report that they are happy with their current retailer/arrangement/plan (selected by 29% of these businesses).
- No other statistically significant differences in reasons for not switching have been observed by location, business size or industry type.



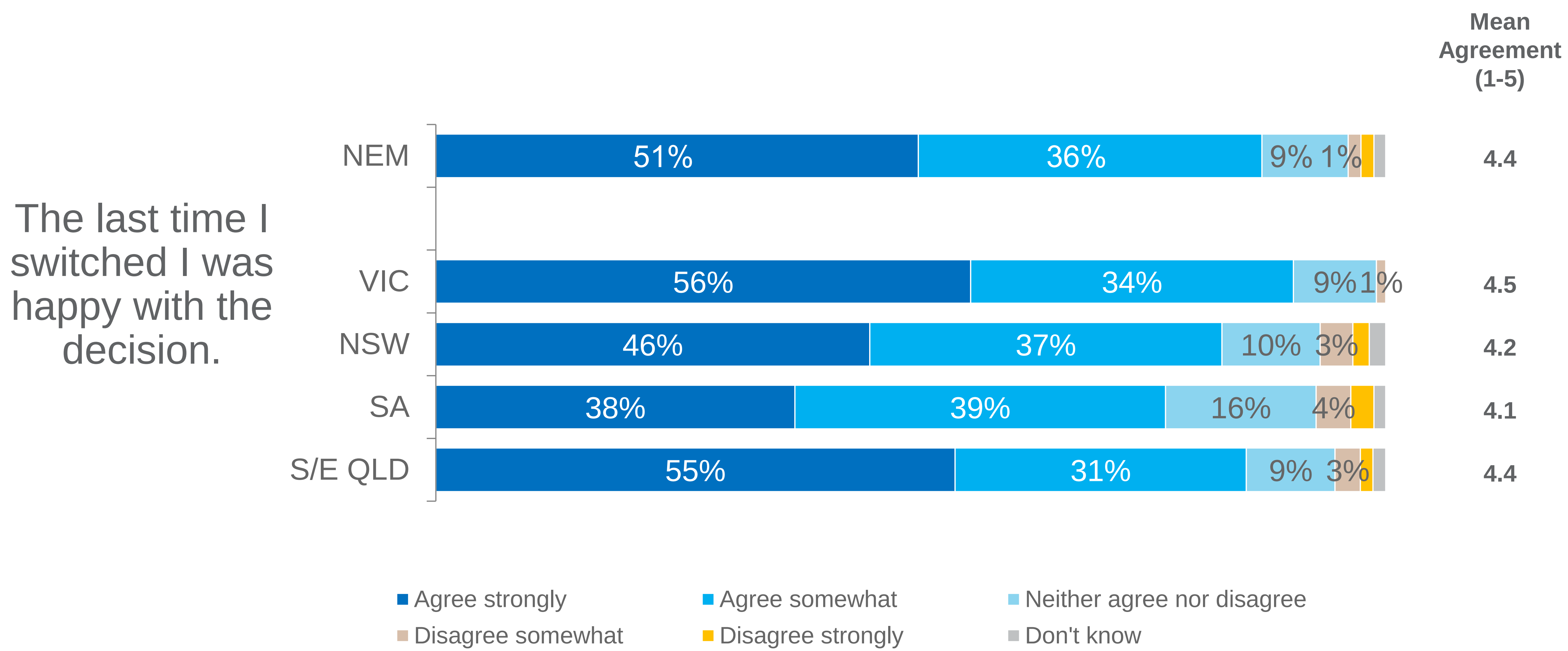
- *Tasmania and 'Rest of QLD' have been excluded from reporting.*
- *ACT results excluded due to small sample size (n < 30)*

Q32. Are there any reasons you haven't investigated different options or changed your business's energy company or plan in the last 12 months? Any other reasons?
Base: NEM participants who have not switched energy company, plan or deal in the past 5 years (n=303); VIC (n=68); NSW (n=85); SA (n=59); S/E QLD (n=64)

Switching outcomes

Satisfaction with decision to switch

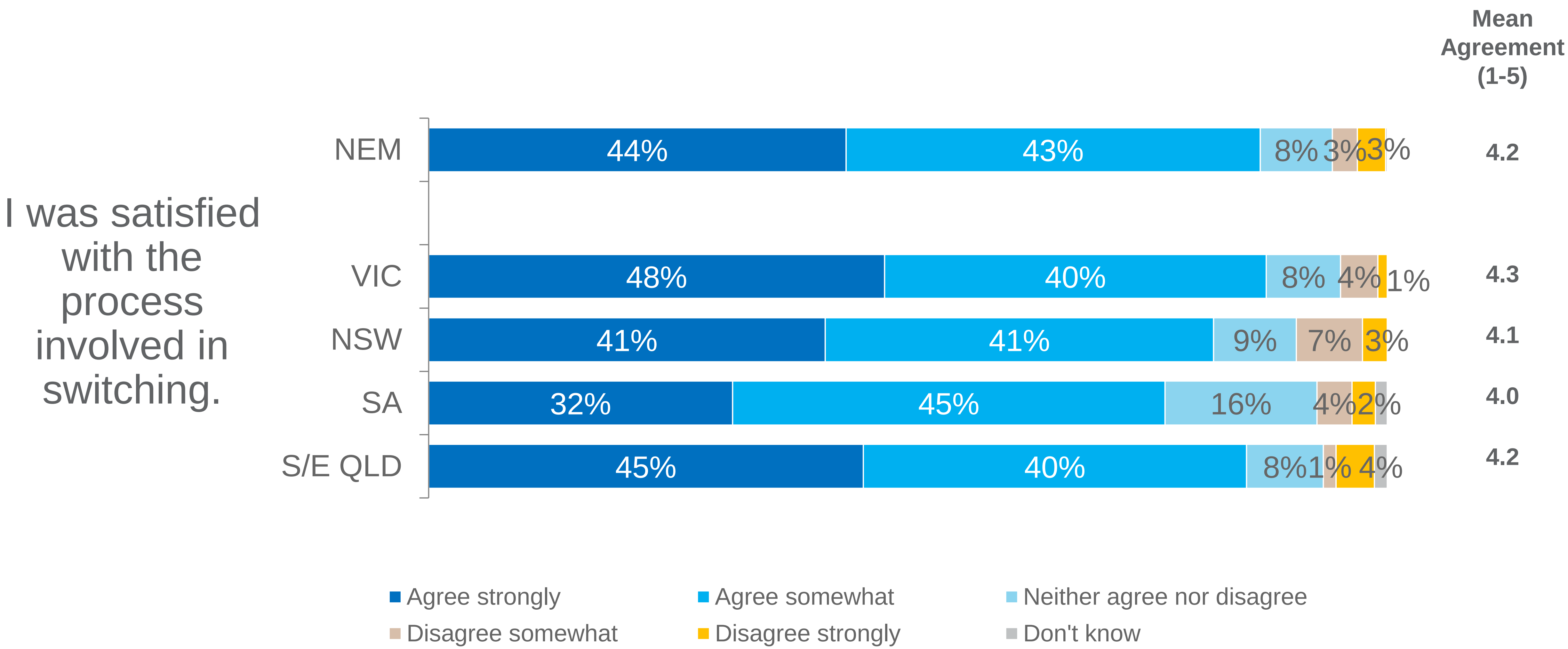
- The vast majority of businesses that had switched reported being happy with their decision to switch.
- No statistically significant differences in average agreement were observed by location, business size or industry type, turnover or languages other than English spoken.



Q50. And having switched your business's energy company, plan or deal, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75).

Satisfaction with switching process

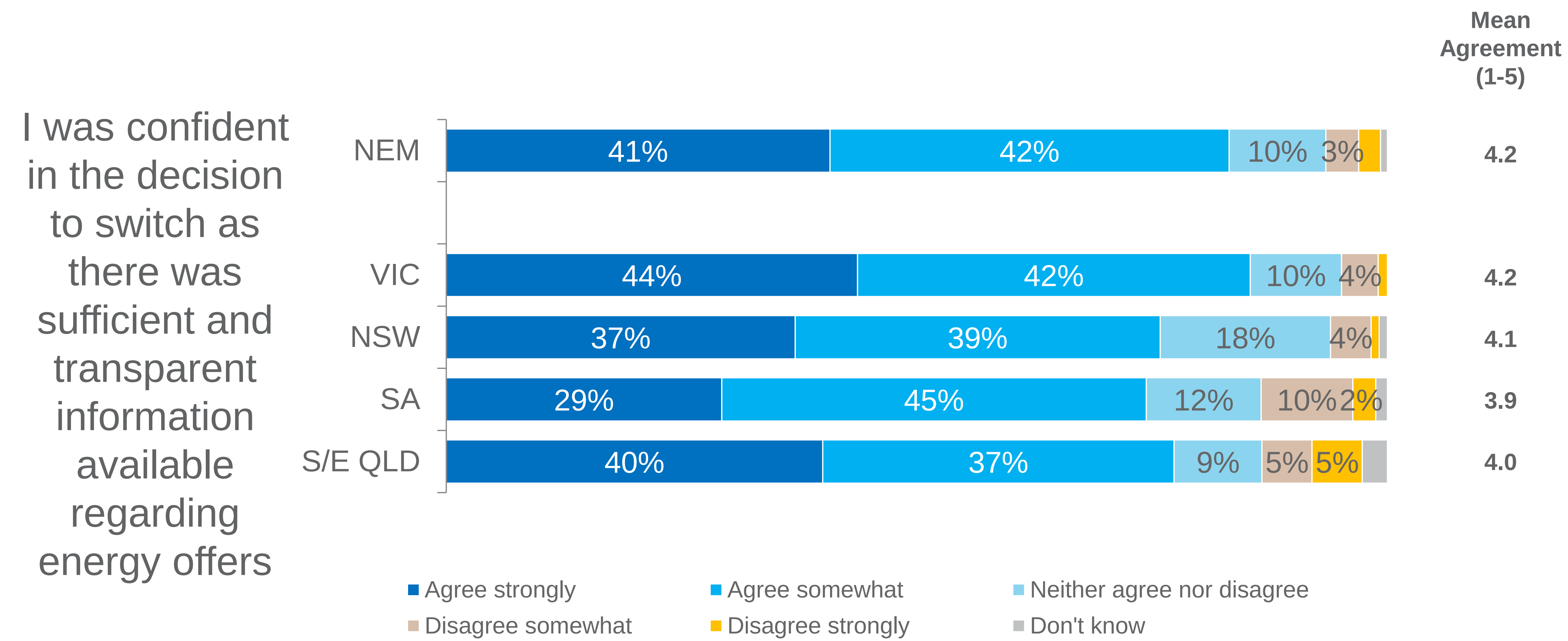
- Most businesses that had switched reported being satisfied with the switching process.
- No statistically significant differences in mean agreement with this statement were observed by location, business size or industry type.



Q50. And having switched your business's energy company, plan or deal, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75).

Sufficient and transparent information available

- The majority of those that had switched energy suppliers reported being confident in their decision to switch given there was sufficient and transparent information available regarding energy offers.
- No statistically significant differences in mean agreement with this statement were observed by location, business size or industry type.

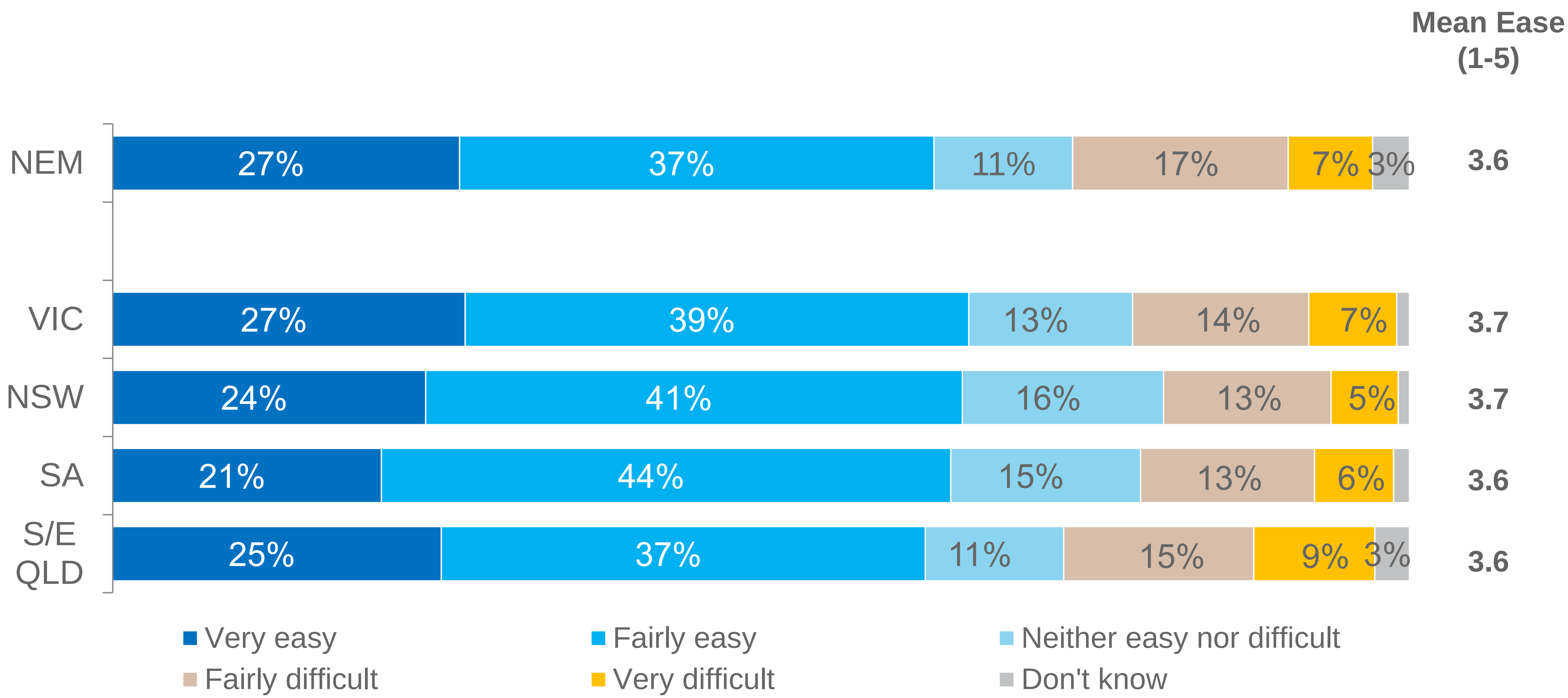


Q50. And having switched your business's energy company, plan or deal, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75).

colmar brunton.

Ease of comparing offers

- While the majority of businesses surveyed described the ease of comparing offers from possible energy suppliers as easy, around 1 in 4 described this process as either 'fairly difficult' or 'quite difficult'.
- No statistically significant differences in average ease of comparing offers were observed by location, business size or industry type.



Q51. The last time you switched your business's energy company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years (n=396); VIC (n=103); NSW (n=116); SA (n=82); S/E QLD (n=75)

Current energy contract

Electricity retailers used

Electricity

- The patterns of reported electricity provider were broadly consistent with the level of competition occurring within the respective jurisdictions.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
AGL Energy	30%	27%	33% ↑	13%	42% ↑	18%	3% ↓	0%
Origin Energy	24%	24%	22%	17%	19%	45% ↑	9%	0%
EnergyAustralia	14%	10%	25% ↑	0%	8%	9%	1%	2%
Red Energy	5%	5%	4%	0%	0%	1%	1%	0%
Alinta Energy	4%	2%	2%	0%	5%	6%	1%	0%
Simply Energy	4%	11% ↑	0%	0%	11% ↑	0%	0%	0%
Momentum Energy	3%	7% ↑	1%	0%	3%	0%	0%	0%
Lumo Energy	3%	4%	1%	0%	4%	1%	0%	0%
Don't know	2%	1%	1%	0%	1%	1%	0%	0%
Click Energy	1%	1%	0%	0%	0%	3% ↑	0%	0%
Sumo Power	1%	1%	0%	0%	0%	0%	0%	0%
1st Energy	1%	1%	0%	2%	0%	0%	1%	0%
BlueNRG	1%	2%	2%	0%	1%	0%	0%	0%
ActewAGL	1%	0%	0%	66% ↑	0%	0%	0%	0%
Powerdirect	1%	1%	0%	0%	4%	4%	0%	0%
GloBird Energy	0%	1%	1%	0%	0%	0%	0%	0%
QEnergy	0%	0%	1%	0%	0%	3%	1%	0%
Dodo Power and Gas	0%	0%	1%	0%	0%	1%	0%	0%
Ergon Energy	0%	0%	0%	0%	0%	5%	76% ↑	0%
Pacific Hydro Retail	0%	1%	0%	0%	0%	0%	0%	0%
ERM Power	0%	1%	1%	0%	0%	1%	0%	0%
CovaU	0%	1%	0%	0%	0%	0%	0%	0%
Commander Power and Gas	0%	0%	0%	0%	1%	0%	0%	0%
Energy Locals	0%	1%	0%	0%	0%	0%	0%	0%
Bill comes from embedded network service provider	0%	0%	0%	0%	1%	1%	0%	0%
Diamond Energy	0%	0%	0%	0%	0%	1%	0%	0%
Aurora Energy	0%	0%	0%	0%	0%	0%	0%	95% ↑
Enova Energy	0%	0%	0%	0%	0%	0%	1% ↑	0%

Q1. What is the name of the company that you receive a bill from for your electricity use?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58)

Gas retailers used

Gas

- The patterns of reported gas provider were broadly consistent with the level of competition occurring within the respective jurisdictions.

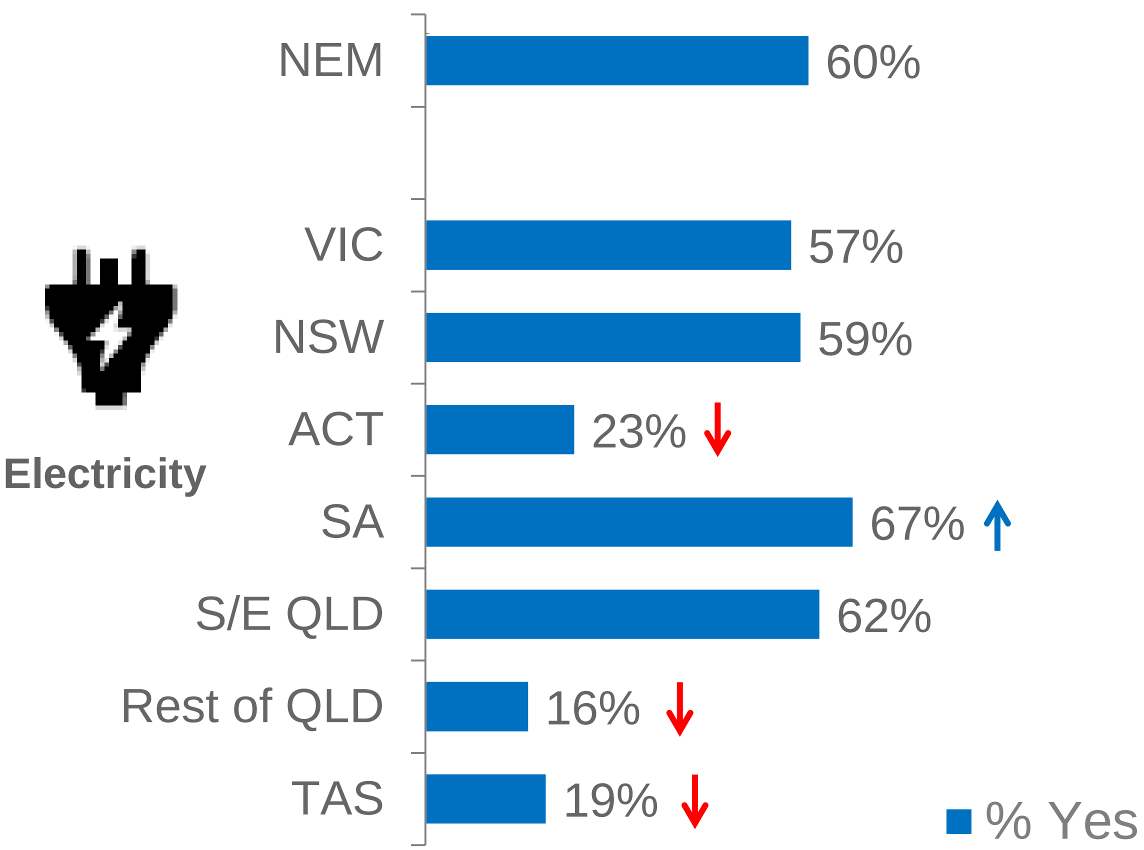
	ECGM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
AGL Energy	40%	36%	53%	-	31%	-	-	-
Origin Energy	22%	24%	10%	-	20%	-	-	-
Energy Australia	10%	13%	25%	-	15%	-	-	-
Red Energy	10%	7%	3%	-	2%	-	-	-
Simply Energy	5%	7%	2%	-	15%	-	-	-
Momentum Energy	3%	1%	0%	-	0%	-	-	-
Lumo Energy	2%	2%	2%	-	0%	-	-	-
Alinta Energy	1%	3%	0%	-	4%	-	-	-
ActewAGL Retail	1%	0%	0%	-	0%	-	-	-
Aurora Energy	1%	0%	2%	-	6%	-	-	-

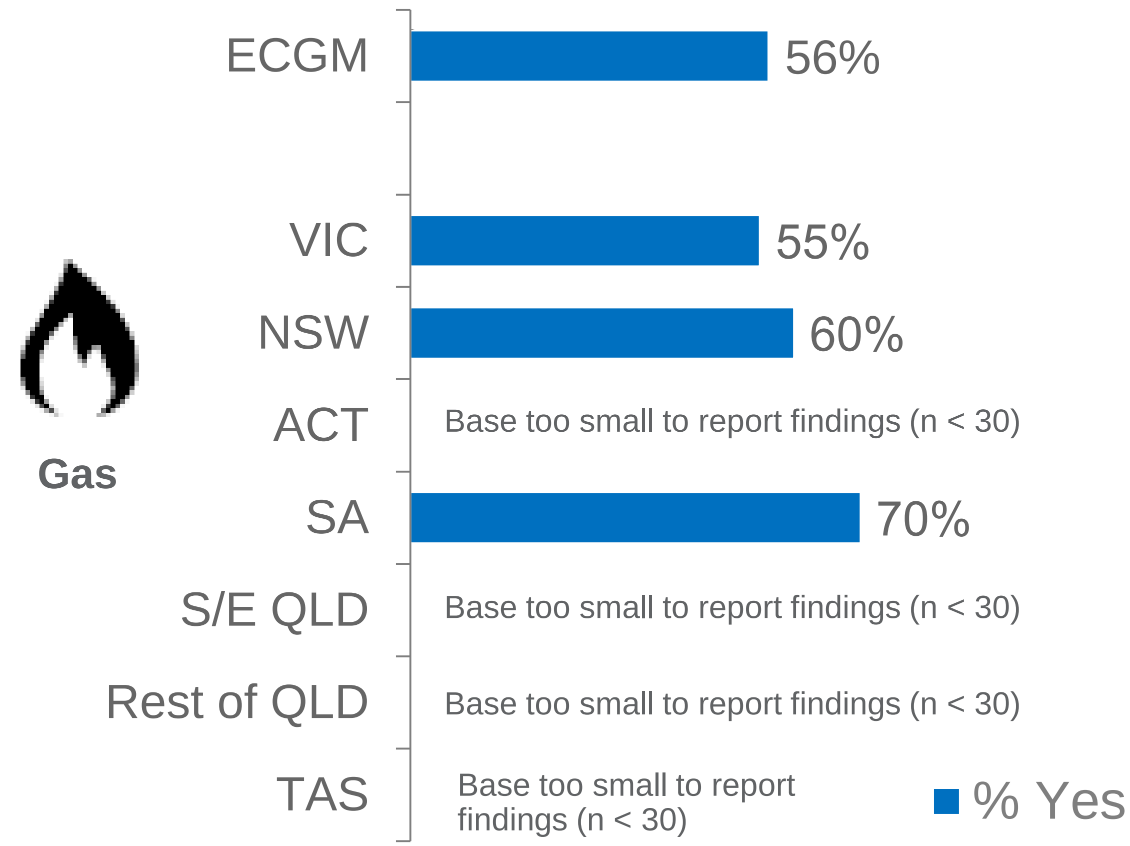
Bases in ACT, S/E QLD, Rest of QLD and TAS too small to report findings (n < 30)

Q6. What is the name of the company you receive a bill from for your mains connected gas use?
Base: ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Rewards or discounts received

- Businesses in the ACT, QLD (excluding South East QLD) and Tasmania were significantly less likely to receive any specific rewards or discounts from their electricity provider.
- No further statistically significant differences in rewards or discounts received by electricity or gas providers were observed by location, business size or industry type.

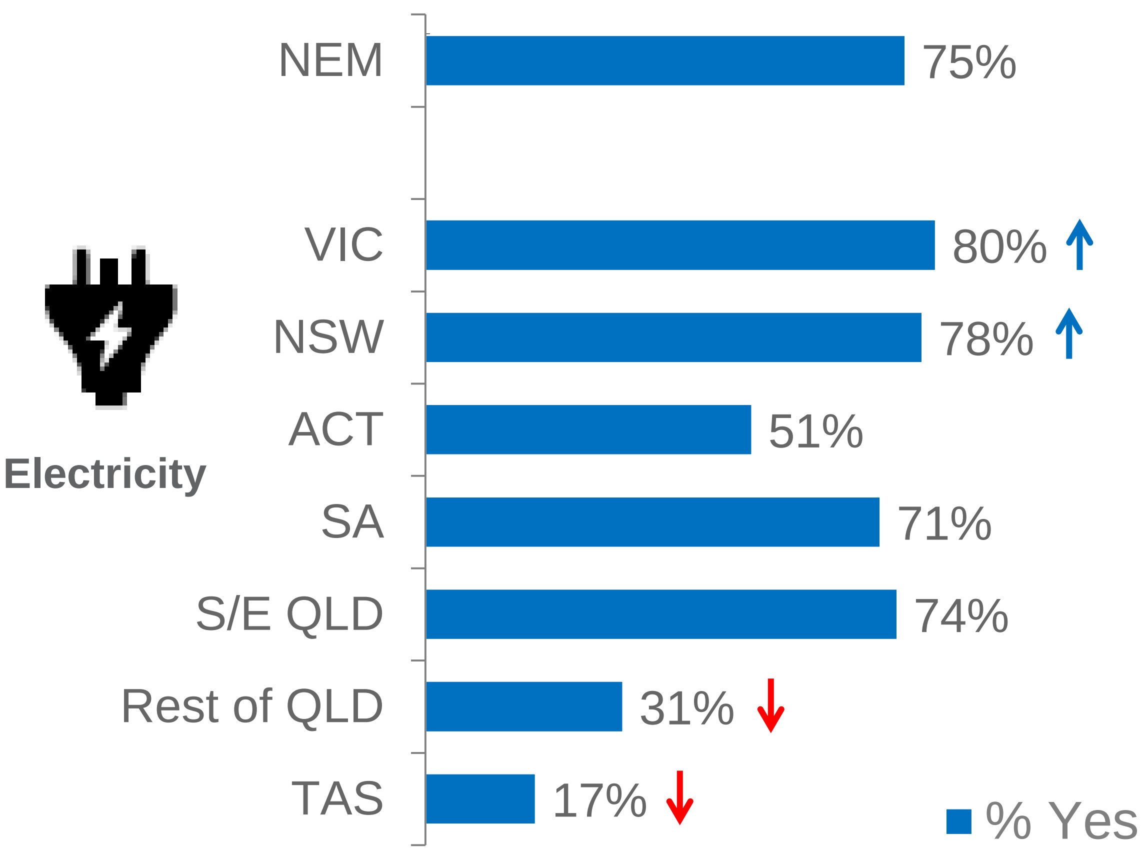


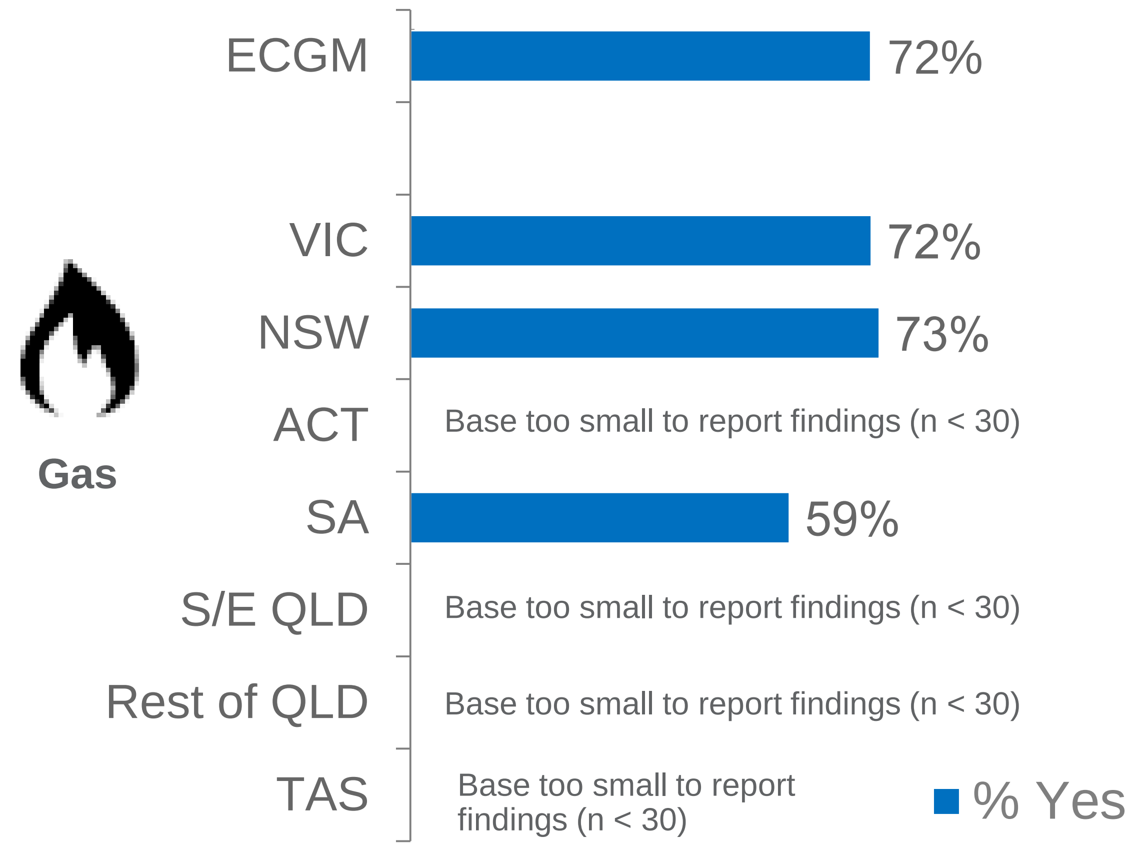


Q70. Does your business' electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58). ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Active choice in current contract

- Businesses in VIC and NSW were significantly more likely to have actively chosen to be on their current electricity contract or plan, whereas businesses in Tasmania and QLD (excluding South East QLD) were significantly less likely to have done so.
- No further statistically significant differences in active choice have been observed by location, business size or industry type for both electricity and gas contracts or plans.





Q66. Did you actively choose to be on this particular contract or plan?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58). ECGM participants (n=225); VIC (n=86); NSW (n=60); SA (n=54).

Electricity billing arrangement

- Non-employing businesses were significantly more likely to be unaware of their current billing situation (11% of these businesses answered ‘Don’t know’).
- No further statistically significant differences in billing arrangements were observed by location, business size or industry type.

Electricity

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Fixed price over a given period	10%	11%	15%	9%	15%	12%	9%	16%
Payment based on volume of electricity consumed (regardless of time, i.e. peak / non-peak periods)	45%	50%	45%	64%	51%	57%	57%	62%
Payment based on volume and time electricity is consumed (peak / non-peak periods)	32%	32%	33%	28%	30%	28%	31%	21%
Something else	0%	1%	0%	0%	0%	0%	0%	0%
Don't know	13%	6%	8%	0%	4%	4%	3%	2%

Q66a. Businesses can often choose to be charged a fixed price for their electricity over a given period; or be charged based on the volume of electricity consumed (and/or the time the electricity is consumed). Which of the following best describes your current billing situation?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Expiration of electricity contract / plan

- Queensland (excluding South East Queensland) and Tasmanian businesses were significantly more likely to indicate that their contract / plan does not have an expiry date.
- No further statistically significant differences have been observed by location, business size or industry type.

Electricity

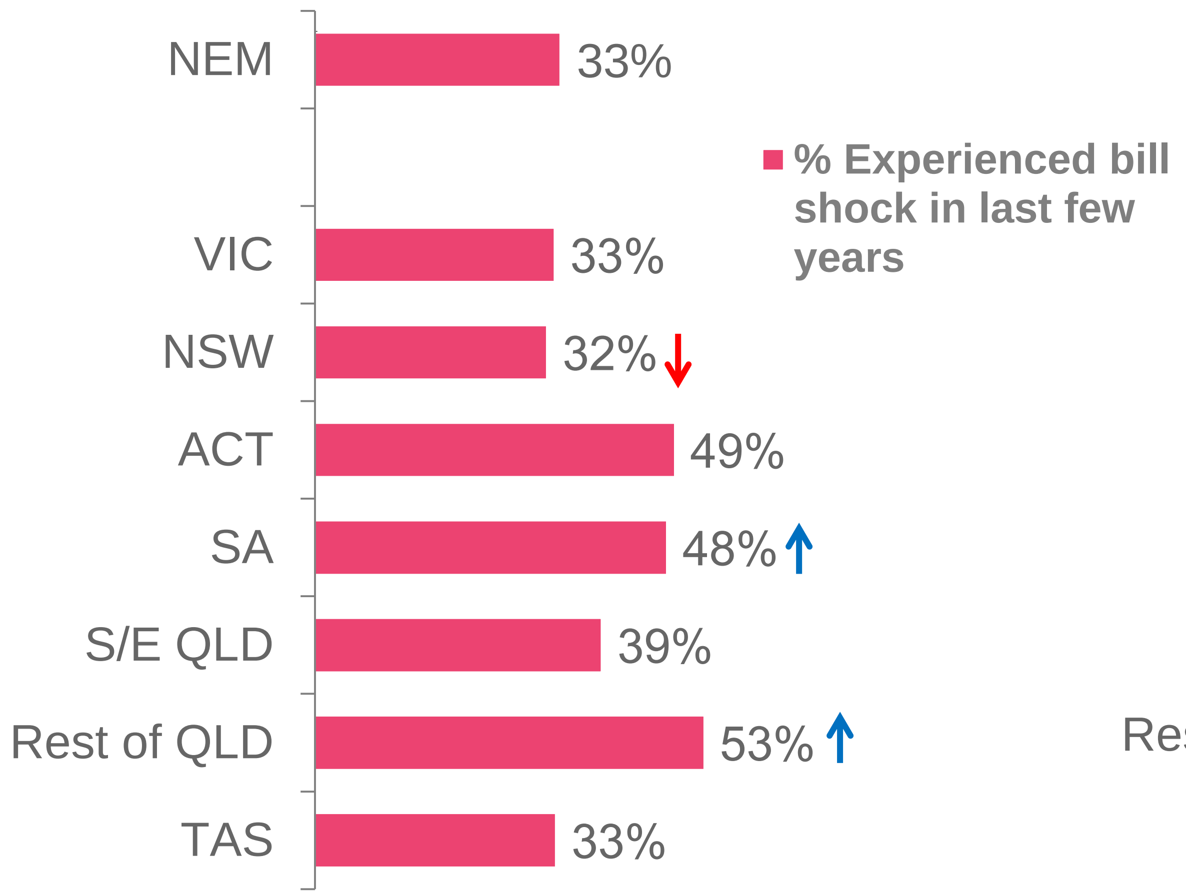
	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
It has already expired	8%	11%	8%	6%	10%	9%	6%	3%
It doesn't have an expiry date	23%	25%	25%	23%	21%	24%	46%↑	50%↑
In the next 6 months	10%	11%	13%	2%	13%	15%	0%	0%
In the next 12 months	20%	19%	22%	4%	16%	14%	3%	2%
In the next 2 years	7%	6%	9%	9%	7%	6%	0%	3%
It runs for more than 2 years	2%	2%	2%	4%	4%	1%	3%	2%
Don't know	31%	27%	21%	51%	29%	30%	43%	40%

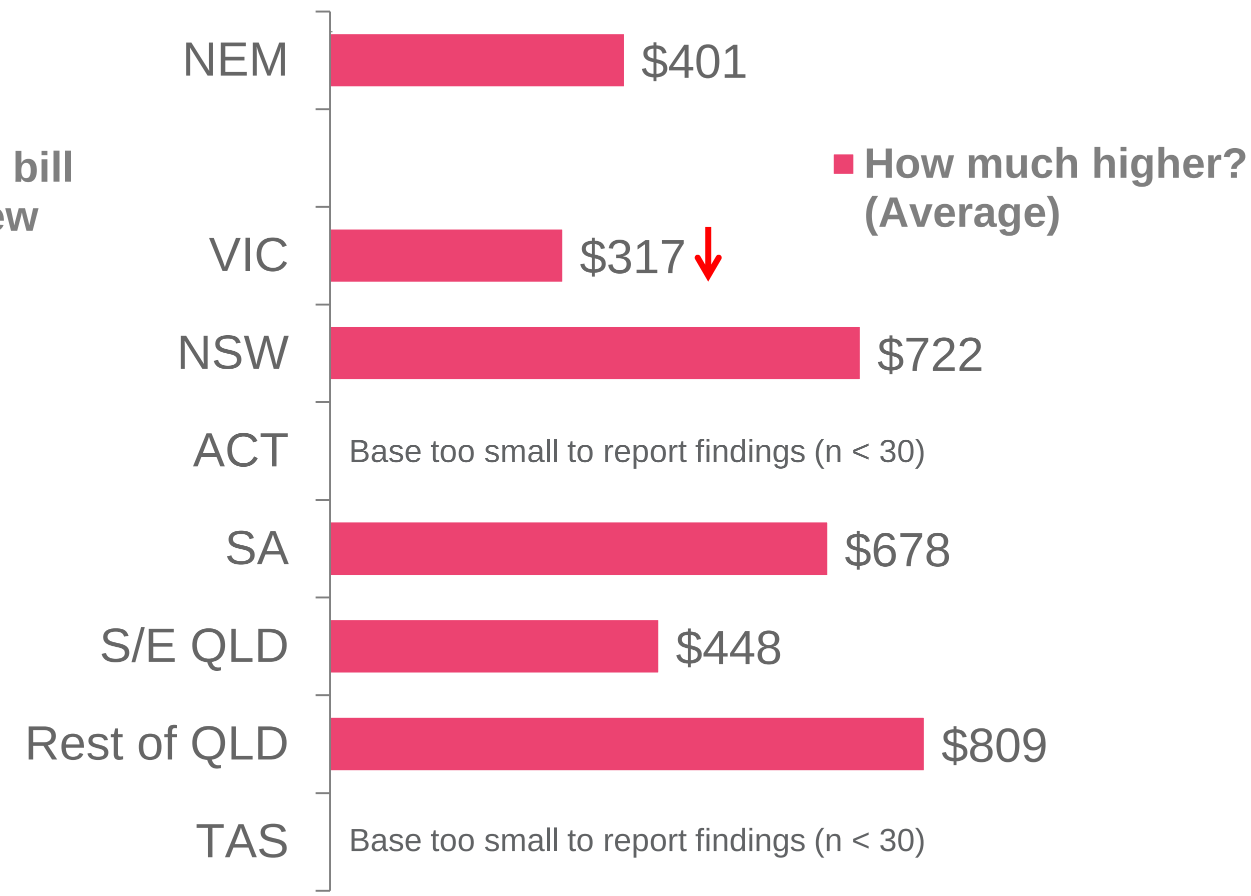
Q65. Do you know if or when your electricity contract or plan expires?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Bill shock and responses

Bill shock

- Businesses in South Australia and QLD (excluding South East Queensland) were significantly more likely to have experienced bill shock in the last few years, as well as businesses in the ‘Retail Trade’ industry (52%).
- Businesses in the ‘Professional, Scientific and Technical Services’ (29%) and ‘Rental, Hiring and Real Estate Services’ (25%) industries were significantly less likely to have experienced bill shock in the last few years.





Q80. Have you had any energy bills in the last few years where the amount really surprised or shocked you? Q81. The last time this happened, how different was it from your normal bills? Q81a. How much higher was it from your normal bills, in dollar terms?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58). NEM participants who have experienced higher than normal bill shock (n=254); VIC (n=51); NSW (n=64); SA (n=66); S/E QLD (n=53); Rest of QLD (n=35).

Reasons for bill increases

- A market increase in the retail cost of energy was cited as the main driver of bill increases for those businesses reporting a degree of bill shock, followed by an increase in energy consumption.
- No statistically significant differences in the reasons for bill increases were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
A market increase in the retail cost of energy	63%	57%	69%	-	82%	55%	60%	-
An increase in your business's energy consumption	31%	31%	20%	-	29%	47%	37%	-
Energy company error (e.g. meter reading, billing error)	5%	12%	3%	-	3%	6%	9%	-
Other	11%	10%	13%	-	8%	13%	6%	-
Don't know	11%	12%	8%	-	3%	4%	14%	-

Bases in ACT and TAS too small to report findings (n < 30)

Q82. You have indicated that your last bill surprised or shocked you as it was higher than a normal bill. What do you think is the main reason for this price increase? (MR)
Base: NEM participants who experienced bill shock in the last few years (n=254); VIC (n=51); NSW (n=64); SA (n=66); S/E QLD (n=53); Rest of QLD (n=35).

Business responses to price increases

- Larger businesses with 20-199 employees were significantly more likely to have responded to energy price increases by passing the price rise on to consumers (selected by 28% of these businesses).
- No further statistically significant differences in responses to bill increases were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Absorbed the price rise with no real action as yet	42%	41%	42%	-	36%	45%	40%	-
Passed the price rise on to consumers	5%	8%	14%	-	17%	8%	14%	-
Made efforts to reduce energy consumption	55%	67%	44%	-	56%	49%	46%	-
Invested in renewables / alternative energy supply	8%	8%	17%	-	15%	8%	17%	-
Switched retailers	16%	14%	9%	-	14%	23%	6%	-
Looking to switch retailers	22%	14%	28%	-	27%	19%	6%	-
Other	7%	2%	5%	-	6%	9%	3%	-
Don't know	1%	2%	2%	-	2%	0%	6%	-

Bases in ACT and TAS too small to report findings (n < 30)

Q82. How has your business responded to the increased cost of energy? What action(s), if any, has your business taken?
Base: NEM participants who experienced bill shock in the last few years (n=254); VIC (n=51); NSW (n=64); SA (n=66); S/E QLD (n=53); Rest of QLD (n=35).

Financial difficulty in last 12 months

- The incidence of businesses reporting financial difficulty was broadly consistent across jurisdictions.
- No statistically significant differences in financial difficulty in previous 12 months were observed by location, business size or industry type.

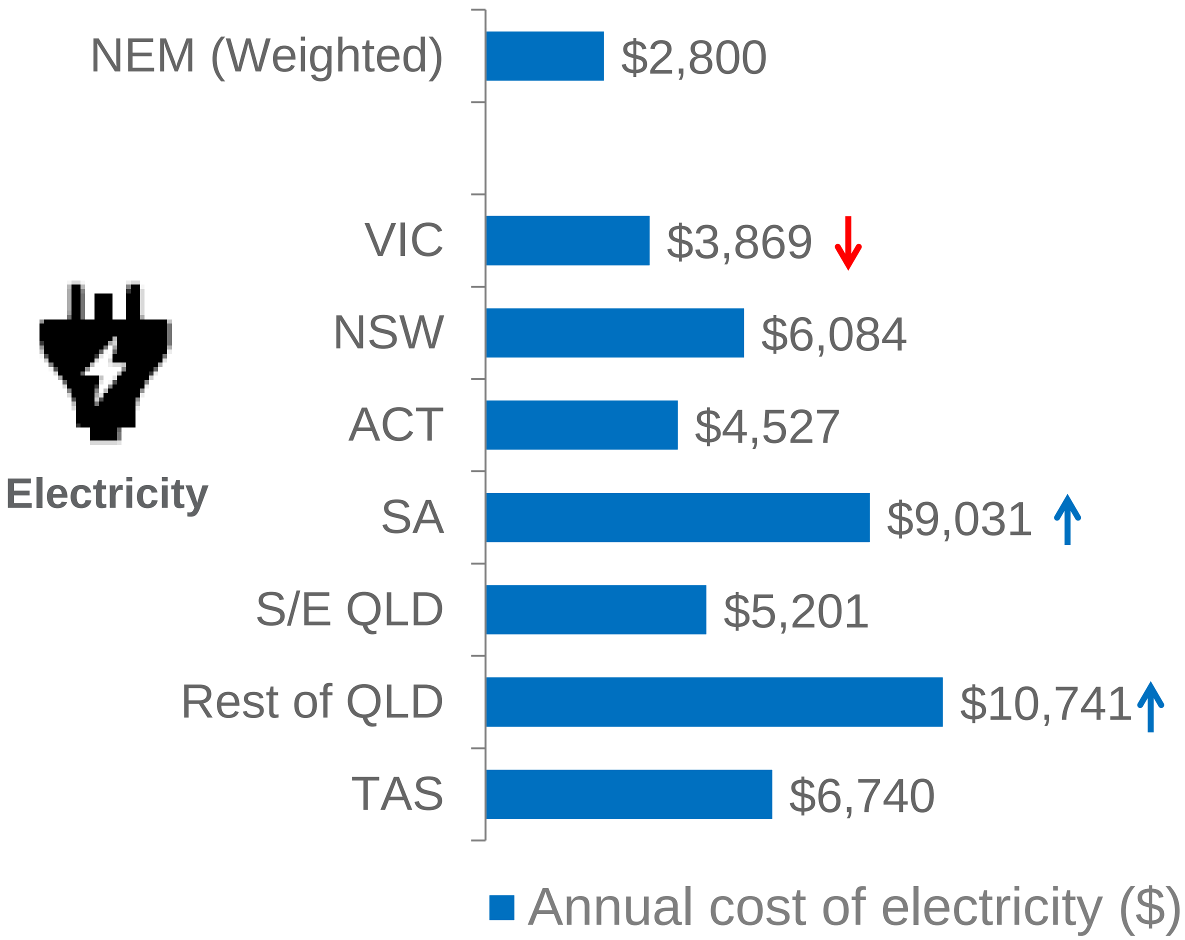
	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Yes - in the last 12 months	9%	10%	5%	2%	16%	11%	13%	9%
Have in the past, more than 12 months ago	4%	7%	8%	4%	8%	7%	6%	7%
No / Never	87%	82%	85%	94%	75%	82%	78%	84%
Don't know	0%	2%	1%	0%	1%	0%	3%	0%

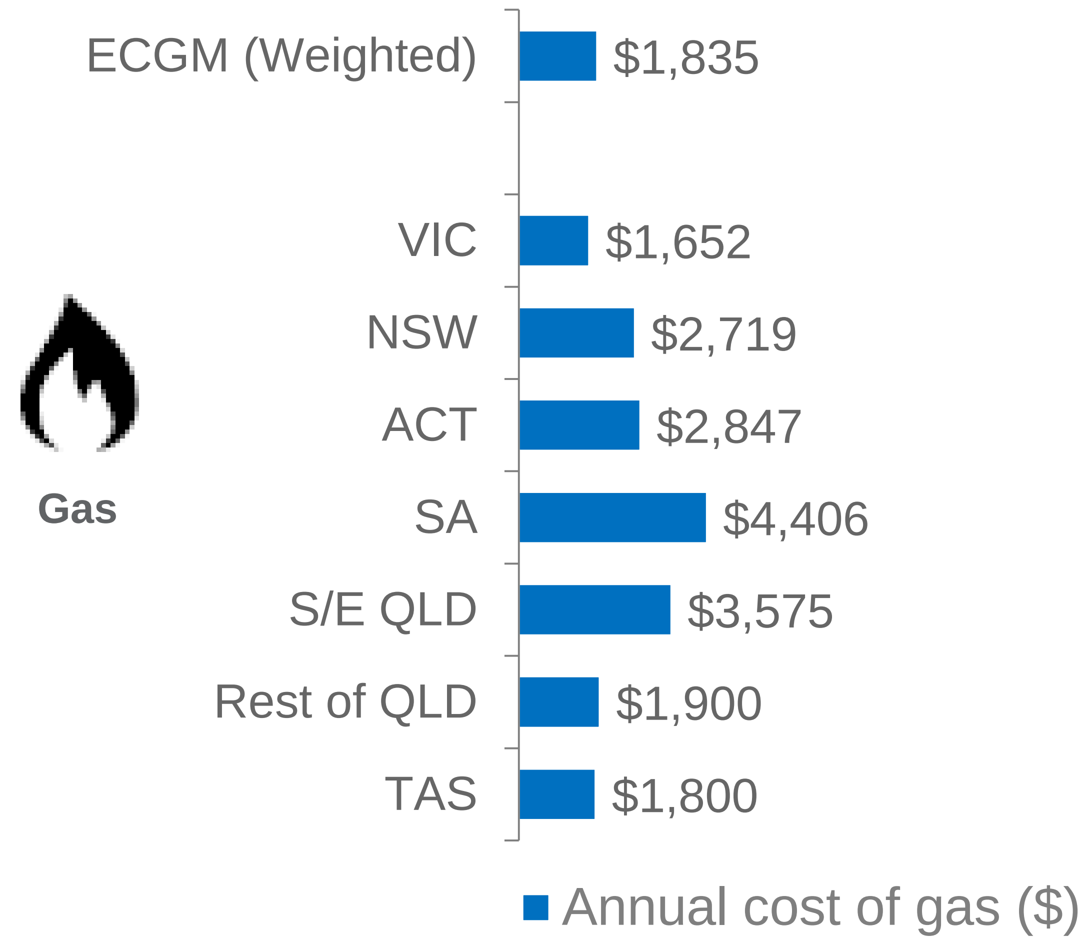
D29. In the last 12 months has your business experienced any financial difficulty in paying energy bills?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Savings required to consider switching

Annual energy costs (unweighted)

- Victorian businesses reported an average annual electricity cost significantly lower than other jurisdictions, while businesses based in South Australia or the Rest of QLD reported a significantly higher average annual electricity cost.
- Unsurprisingly, the annual cost of electricity was significantly lower among smaller businesses ($1,932 for non-employing businesses and $3,779 for businesses with 1-4 employees) and significantly higher among larger businesses ($7,465 for businesses with 5-19 employees and $12,570 for businesses with 20-199 employees).
- Businesses in the Accommodation and Food Services industry had a significantly higher annual cost of electricity ($12,187) compared to the average

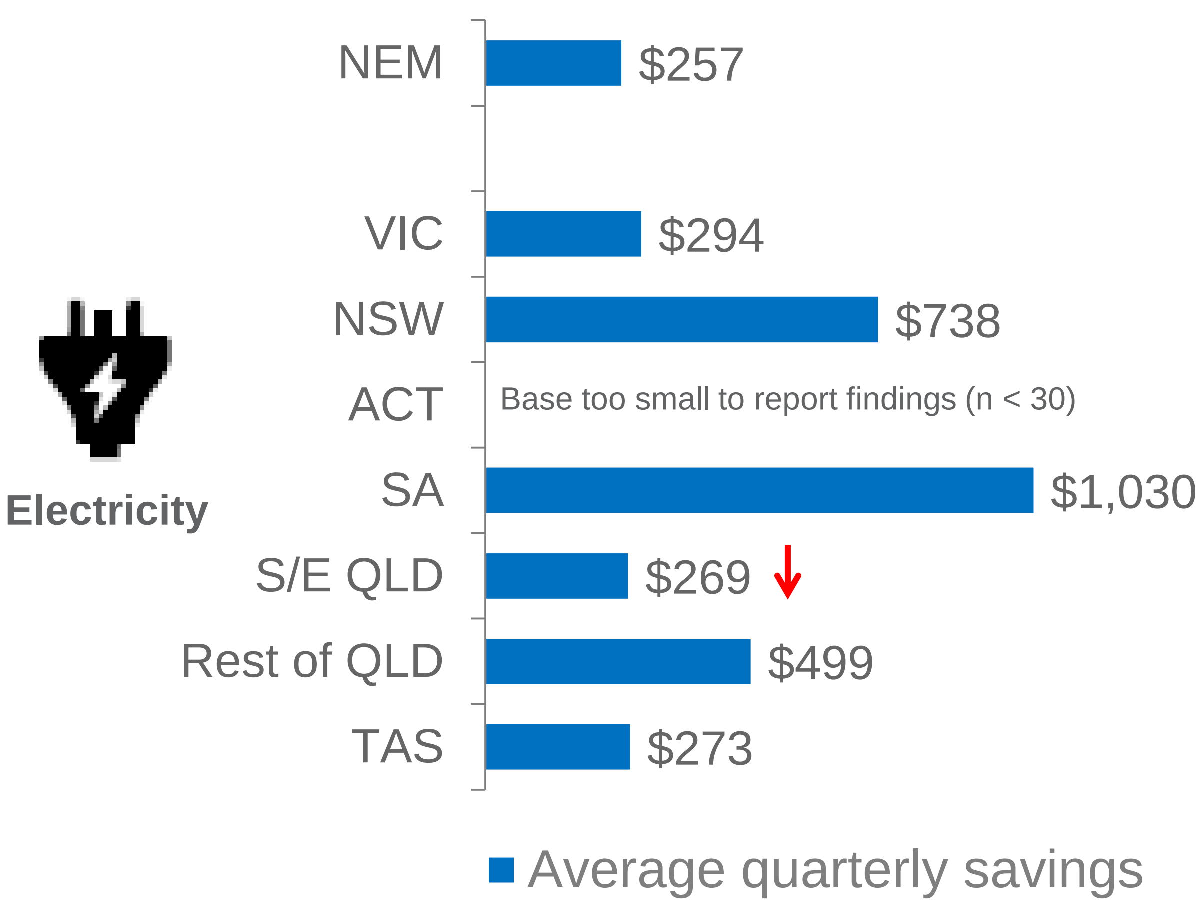


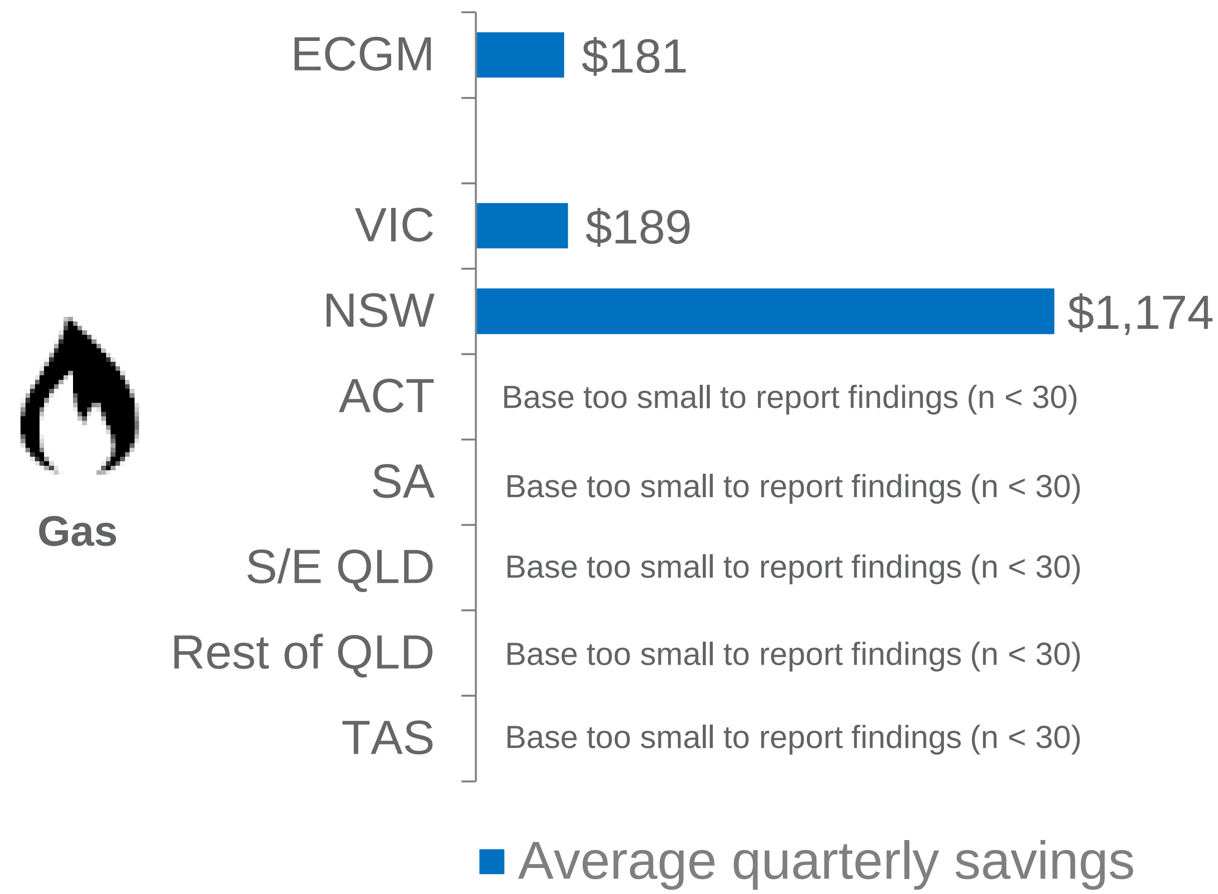


D3. How much was your business' most recent electricity bill? D3a. How often does your business receive your electricity bill? D4. How much was your business's most recent gas bill? D4a. How often does your business receive your gas bill?
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58). ECGM participants (n=196); VIC (n=73); NSW (n=52); SA (n=50).

Average quarterly savings required to consider switching

- Businesses in South East QLD reported significantly lower savings required to consider switching.
- In line with reduced electricity spend, smaller businesses also reported significantly less savings required to consider switching ($164 for non-employing businesses and $213 for businesses with 1-4 employees). Conversely, large businesses with 20-199 employees required quarterly savings of $1,555 which was significantly high.





Q60. Relative to that last electricity bill, how much money would you need to save in order to seriously consider changing your business' company or plan? Q61. Relative to that last gas bill, how much money would you need to save to seriously consider changing your business' company or plan?
Base: All NEM participants – excluding those who have experienced bill shock (n=445); VIC (n=120); NSW (n=141); SA (n=74); S/E QLD (n=86); Rest of QLD (n=32); TAS (n=39).
ECGM participants excluding those who have experienced bill shock (n=132); VIC (n=54); NSW (n=39)

Adoption of new technologies

Use / uptake of solar panels

- Businesses that are significantly more likely to ‘already have’ solar panels include those in regional areas (27%) and those in the ‘Agriculture, Forestry and Fishing’ industry (43%).
- Businesses in the ‘Professional, Scientific and Technical Services’ (46%) and ‘Rental, Hiring and Real Estate Services’ (55%) industry types were significantly more likely to indicate that they ‘definitely won’t’ have solar panels in the next two years.
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	19%	19%	18%	13%	21%	21%	31%	9%
Definitely will	4%	6%	6%	0%	6%	7%	3%	9%
Probably will	6%	8%	9%	11%	11%	9%	12%	2%
Might	16%	17%	16%	13%	15%	7%	6%	17%
Probably won't	16%	19%	21%	26%	15%	22%	16%	26%
Definitely won't	39%	32%	31%	38%	30%	33%	32%	38%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won’t or definitely won’t have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Use / uptake of solar hot water systems

- Businesses in the ‘Agriculture, Forestry and Fishing’ industry were significantly more likely to ‘already have’ solar hot water systems (25%).
- Businesses in the ‘Rental, Hiring and Real Estate Services’ industry were significantly more likely to indicate that they ‘definitely won’t’ have solar hot water systems in the next two years (59%).
- Large businesses (20-199 employees) were significantly less likely to rule-out having solar systems in the next two years (only 26% of these businesses selected ‘definitely won’t’).
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	10%	11%	10%	9%	8%	10%	16%	9%
Definitely will	2%	4%	7%	0%	3%	4%	3%	0%
Probably will	5%	9%	7%	4%	8%	7%	12%	2%
Might	17%	17%	15%	13%	15%	13%	9%	12%
Probably won't	24%	22%	24%	30%	26%	28%	18%	31%
Definitely won't	41%	37%	37%	45%	39%	38%	43%	47%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won’t or definitely won’t have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Use / uptake of batteries for storing electricity

- Businesses in the 'Rental, Hiring and Real Estate Services' industry (58%) were significantly more likely to indicate they 'definitely won't' have solar hot water systems in the next two years.
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	2%	2%	2%	2%	1%	2%	1%	2%
Definitely will	3%	5%	7%	2%	5%	5%	4%	2%
Probably will	13%	13%	15%	9%	13%	11%	9%	10%
Might	19%	20%	17%	11%	28%	18%	15%	19%
Probably won't	23%	20%	21%	34%	22%	32%	28%	26%
Definitely won't	40%	40%	37%	43%	31%	31%	43%	41%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won't or definitely won't have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

colmar brunton.

Use / uptake of electric vehicles

- Large businesses with 20-199 employees were significantly more likely to indicate they ‘definitely will’ (8%) or ‘probably will’ (14%) be using electric cars in the next two years.
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	1%	2%	2%	4%	4%	6%	1%	0%
Definitely will	1%	2%	6%	0%	1%	4%	3%	2%
Probably will	6%	10%	7%	4%	6%	9%	4%	2%
Might	13%	17%	12%	15%	17%	13%	12%	14%
Probably won't	31%	26%	26%	32%	30%	30%	22%	24%
Definitely won't	47%	42%	47%	45%	43%	38%	57%	59%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won’t or definitely won’t have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Use / uptake of smart meters

A digital interval meter, also known as a 'smart meter'

- Victorian businesses were significantly more likely to already be utilising smart meters while businesses in South East QLD and Tasmania were significantly less likely to be doing so. Tasmanian businesses were also significantly more likely to indicate they definitely won't be utilising smart meters within the next two years.
- Larger businesses (20-199 employees) were significantly more likely to indicate that they 'probably will' utilise smart meters in the next two years (25%).
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	31%	52% ↑	16%	9%	13%	9% ↓	12%	0% ↓
Definitely will	4%	3%	6%	2%	6%	5%	9%	3%
Probably will	9%	11%	15%	6%	16%	20%	9%	12%
Might	21%	13%	22%	23%	24%	24%	26%	21%
Probably won't	16%	9% ↓	20%	32%	18%	26%	21%	22%
Definitely won't	19%	11% ↓	22%	28%	23%	17%	24%	41% ↑

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won't or definitely won't have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Use / uptake of energy management systems

An energy management system or provider which automatically controls your heating or cooling thermostat and appliances according to your settings

- Tasmanian businesses and businesses in the ‘Rental, Hiring and Real Estate Services’ industry (51%) were significantly more likely to indicate they ‘definitely won’t’ be utilising energy management systems within the next two years.
- Businesses in the ‘Accommodation and Food Services’ industry were significantly more likely to indicate they ‘probably won’t’ be utilising energy management systems within the next two years (49%).
- Large businesses with 20-199 employees were significantly more likely to indicate that they ‘definitely will’ utilise these systems in the next two years (12%).
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	3%	6%	5%	9%	5%	4%	3%	7%
Definitely will	3%	5%	7%	2%	4%	8%	7%	5%
Probably will	9%	11%	11%	9%	12%	12%	9%	9%
Might	19%	20%	20%	19%	23%	16%	12%	12%
Probably won't	29%	27%	24%	32%	22%	34%	34%	16%
Definitely won't	36%	30%	32%	30%	35%	27%	35%	52% ↑

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won’t or definitely won’t have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Use / uptake of apps to remotely control appliances

An app that allows you to remotely control / adjust your appliances via your mobile phone

- Smaller businesses (1-4 employees) were significantly more likely to indicate they 'definitely won't' use apps to remotely control appliances in the next two years (47%).
- No further statistically significant differences were observed by location, business size or industry type.

	NEM	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS
Already have	1%	2%	2%	0%	2%	1%	4%	5%
Definitely will	3%	4%	6%	0%	5%	6%	6%	2%
Probably will	8%	12%	12%	13%	15%	16%	4%	9%
Might	19%	20%	20%	17%	20%	11%	18%	12%
Probably won't	28%	22%	25%	34%	24%	32%	28%	16%
Definitely won't	40%	39%	34%	36%	34%	34%	40%	57%

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won't or definitely won't have this.
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58).

Ownership of new technologies

NEM	Solar panels (19%)	Solar hot water system (10%)	Batteries for storing electricity (2%)	Electric vehicle/s (1%)	Smart meters (31%)	Energy management system (3%)
Own it outright	91%	92%	-	-	38%	84%
Own it with a loan purchase	4%	4%	-	-	0%	5%
Lease it	3%	3%	-	-	11%	5%
Something else	0%	0%	-	-	6%	1%
Don't know	1%	0%	-	-	44%	5%

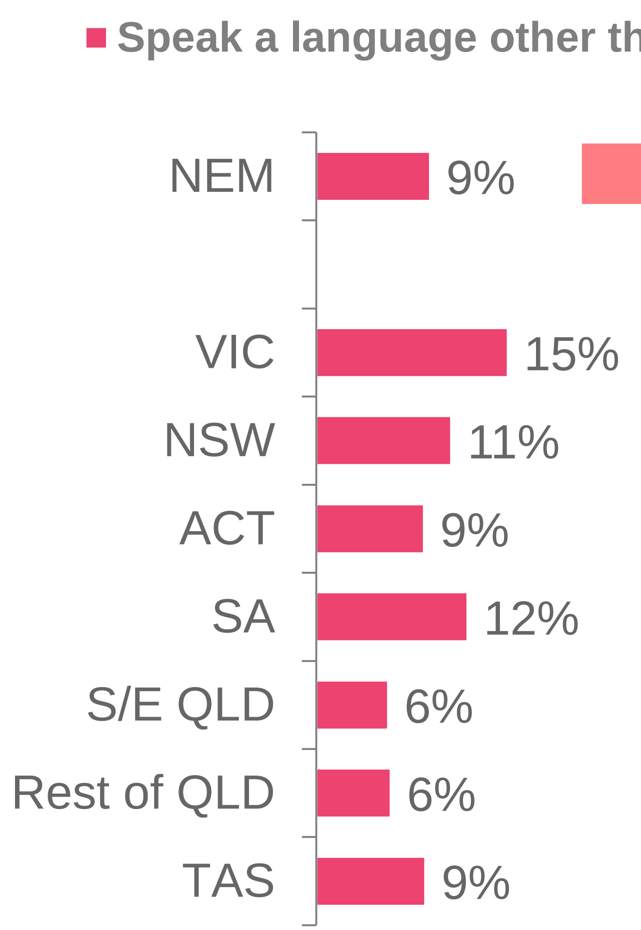
D5f. D5f. Which of the following best describes your ownership arrangement of your business's [insert technology

Base: All NEM participants who have adopted each technology – solar panels (n=138); solar hot water system (n=69); batteries for storing electricity (n=12); electric vehicle/s (n=23); smart meters (n=159); energy management system (n=38).

Language barriers

Language other than English

- Businesses in metropolitan areas were significantly more likely to speak a language other than English at home (13% compared to 5% for regional based businesses). The most common languages spoken were Chinese and a combination of European languages.
- No further statistically significant differences have been observed by location, business size or industry type.



Experienced language barriers in terms of…

% Yes	NEM
Understanding your energy bill	13%
Considering an alternative energy company, plan or contract	11%
Considering investing in energy management or generation technology	7%

Bases too small to report state-based findings.

D31. Do you speak a language other than English at home? D33. Have you experienced any language barriers that have negatively impacted on your ability to…
Base: All NEM participants (n=714); VIC (n=178); NSW (n=206); ACT (n=47); SA (n=142); S/E QLD (n=141); Rest of QLD (n=68); TAS (n=58). NEM participants who speak a language other than English at home (n=78).

Appendix A – Data Weighting

Weighting

A disproportionate, stratified sampling approach was used in undertaking both the CATI and online survey components of the study to facilitate comparison of results by location and business size. Minimum quotas by industry type were also set to ensure the data was representative of the broader small business population.

The final samples achieved for the CATI and Online samples are presented in the following pages.

The survey data was then post weighted using the latest available ABS business counts data by location (8165.0 - Counts of Australian Businesses, including Entries and Exits). To ensure comparability of the time series comparisons, this was done on the 2018 CATI sample and all previous business samples (2017, 2016, 2015 and 2014). All analysis in Chapter 1 is based on this weighted data.

For Chapter 2, a new weighting index was developed based on the business size and location incidence of the combined CATI and online data set. In Chapter 2, the NEM figure represents the weighted overall result for each question, with significant differences by business size, location, industry type and turnover all reported on using the unweighted survey results (this allows for a better comparison on these factors as per our original disproportionate stratified sampling approach).

Distribution of final CATI sample by business size and location

	Non-employing	1-4 employees	5-19 employees	20-199 employees
Sydney	7% 4	15% 19	12% 17	9% 6
Other NSW	2% 1	12% 16	6% 8	9% 6
ACT	17% 10	8% 10	10% 14	4% 3
Melbourne	12% 7	14% 18	19% 27	6% 4
Other VIC	8% 5	3% 4	4% 6	4% 3
Brisbane	18% 11	8% 10	14% 19	7% 5
Other South East Queensland	7% 4	4% 5	5% 7	12% 8
Rest of Queensland	5% 3	9% 12	6% 9	17% 12
Adelaide	15% 9	12% 16	14% 20	14% 10
Other SA	5% 3	5% 6	1% 1	7% 5
TAS	5% 3	11% 15	9% 12	10% 7
Total	**60**	**131**	**140**	**69**

Distribution of final online sample by business size and location

	Non-employing	1-4 employees	5-19 employees	20-199 employees
Sydney	13% 11	13% 17	29% 37	26% 24
Other NSW	17% 15	9% 12	9% 12	1% 1
ACT	5% 4	1% 2	1% 1	3% 3
Melbourne	8% 7	19% 26	22% 28	20% 18
Other VIC	8% 7	11% 15	1% 1	2% 2
Brisbane	10% 9	16% 22	9% 11	14% 13
Other South East Queensland	2% 2	5% 7	4% 5	3% 3
Rest of Queensland	11% 10	7% 9	3% 4	10% 9
Adelaide	17% 15	10% 14	17% 22	10% 9
Other SA	3% 3	4% 5	2% 2	2% 2
TAS	6% 5	4% 5	3% 4	8% 7
Total	**88**	**134**	**127**	**91**

Weighting factors applied to 2014 CATI data

	Non employing			1-4 Employees			5-19 Employees			20-199 Employees		
	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor
Sydney	18.0%	1.9%	**9.42**	9.3%	2.2%	**4.26**	2.7%	3.8%	**0.71**	0.7%	4.6%	**0.15**
Other NSW	6.2%	0.8%	**7.56**	2.9%	3.3%	**0.88**	1.1%	2.5%	**0.44**	0.2%	1.1%	**0.17**
ACT	0.9%	3.0%	**0.29**	0.4%	1.6%	**0.26**	0.2%	4.4%	**0.04**	0.0%	3.3%	**0.01**
Melbourne	15.1%	3.6%	**4.26**	6.8%	3.0%	**2.26**	2.2%	5.5%	**0.40**	0.6%	2.7%	**0.21**
Other VIC	4.7%	1.9%	**2.46**	2.1%	1.1%	**1.94**	0.7%	0.8%	**0.91**	0.1%	1.4%	**0.10**
Brisbane	6.1%	3.8%	**1.60**	2.7%	6.0%	**0.46**	1.0%	3.0%	**0.33**	0.3%	4.9%	**0.06**
Other SE QLD	4.0%	4.1%	**0.98**	1.7%	3.0%	**0.56**	0.6%	1.1%	**0.52**	0.1%	0.3%	**0.46**
Adelaide	4.0%	4.1%	**0.98**	1.3%	3.8%	**0.34**	0.6%	3.6%	**0.16**	0.1%	4.6%	**0.03**
Other SA	1.5%	1.6%	**0.93**	0.7%	1.9%	**0.34**	0.3%	1.1%	**0.26**	0.0%	0.5%	**0.08**

Weighting factors applied to 2015 CATI data

	Non employing			1-4 Employees			5-19 Employees			20-199 Employees		
	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor
Sydney	18.1%	2.7%	**6.78**	9.5%	4.7%	**2.04**	2.7%	4.4%	**0.60**	0.7%	2.4%	**0.29**
Other NSW	6.1%	1.8%	**3.45**	2.9%	3.6%	**0.82**	1.0%	1.8%	**0.58**	0.2%	0.9%	**0.20**
ACT	0.8%	1.1%	**0.76**	0.4%	2.7%	**0.16**	0.2%	5.3%	**0.03**	0.0%	2.0%	**0.02**
Melbourne	15.3%	3.8%	**4.04**	6.9%	6.4%	**1.06**	2.1%	4.2%	**0.51**	0.6%	2.2%	**0.26**
Other VIC	4.7%	1.3%	**3.50**	2.1%	2.7%	**0.80**	0.7%	1.3%	**0.53**	0.1%	0.2%	**0.59**
Brisbane	6.1%	1.8%	**3.41**	2.8%	5.8%	**0.48**	1.0%	5.1%	**0.19**	0.3%	2.2%	**0.12**
Other SE QLD	4.0%	1.6%	**2.54**	1.7%	4.7%	**0.36**	0.6%	0.9%	**0.63**	0.1%	0.2%	**0.59**
Adelaide	4.0%	3.8%	**1.05**	1.3%	4.9%	**0.26**	0.5%	6.0%	**0.09**	0.1%	2.4%	**0.06**
Other SA	1.5%	0.2%	**6.75**	0.6%	1.8%	**0.37**	0.3%	1.6%	**0.16**	0.0%	1.6%	**0.03**

Weighting factor applied to 2016 CATI data

	Non employing			1-4 Employees			5-19 Employees			20-199 Employees		
	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor
Sydney	18.2%	4.2%	**4.34**	9.6%	4.6%	**2.07**	18.2%	3.1%	**5.88**	18.2%	2.2%	**8.24**
Other NSW	6.0%	2.9%	**2.09**	2.9%	3.3%	**0.87**	6.0%	1.3%	**4.53**	6.0%	0.4%	**13.59**
ACT	0.9%	2.7%	**0.33**	0.4%	2.2%	**0.20**	0.9%	3.8%	**0.23**	0.9%	2.4%	**0.35**
Melbourne	15.5%	2.9%	**5.38**	6.8%	6.4%	**1.07**	15.5%	4.6%	**3.33**	15.5%	2.2%	**6.99**
Other VIC	4.6%	2.7%	**1.73**	2.1%	2.4%	**0.86**	4.6%	0.7%	**6.92**	4.6%	0.4%	**10.39**
Brisbane	6.1%	6.2%	**0.99**	2.7%	4.6%	**0.59**	6.1%	2.4%	**2.51**	6.1%	1.1%	**5.53**
Other SE QLD	4.0%	3.3%	**1.20**	1.7%	2.7%	**0.65**	4.0%	1.3%	**3.00**	4.0%	0.4%	**9.00**
Adelaide	3.9%	5.1%	**0.76**	1.3%	5.1%	**0.25**	3.9%	5.3%	**0.73**	3.9%	1.8%	**2.20**
Other SA	1.5%	2.0%	**0.74**	0.6%	2.2%	**0.28**	1.5%	0.7%	**2.22**	1.5%	0.2%	**6.67**

Weighting factors applied to 2017 CATI data

	Non employing			1-4 Employees			5-19 Employees			20-199 Employees		
	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor
Sydney	18.5%	5.3%	**3.46**	9.6%	5.8%	**1.66**	2.7%	2.2%	**1.21**	0.7%	0.9%	**0.79**
Other NSW	5.9%	3.8%	**1.56**	2.8%	2.9%	**0.98**	1.0%	0.9%	**1.12**	0.2%	0.7%	**0.26**
ACT	0.9%	1.6%	**0.56**	0.4%	2.9%	**0.15**	0.2%	6.2%	**0.03**	0.0%	0.2%	**0.19**
Melbourne	15.8%	6.9%	**2.30**	6.7%	5.3%	**1.26**	2.1%	2.7%	**0.79**	0.6%	1.1%	**0.52**
Other VIC	4.5%	1.8%	**2.53**	2.0%	3.6%	**0.58**	0.7%	0.7%	**1.00**	0.1%	0.2%	**0.57**
Brisbane	6.2%	6.2%	**0.99**	2.7%	6.0%	**0.45**	1.0%	1.8%	**0.54**	0.3%	0.4%	**0.58**
Other SE QLD	4.0%	3.1%	**1.30**	1.7%	4.0%	**0.43**	0.6%	0.7%	**0.85**	0.1%	-	**-**
Adelaide	3.9%	8.7%	**0.45**	1.2%	5.1%	**0.24**	0.5%	2.2%	**0.23**	0.1%	1.1%	**0.11**
Other SA	1.4%	2.4%	**0.59**	0.6%	2.2%	**0.27**	0.2%	0.4%	**0.54**	0.0%	-	**-**

colmar brunton.

Weightings applied to 2018 CATI data

	Non employing			1-4 Employees			5-19 Employees			20-199 Employees		
	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor
Sydney	18.45%	1.22%	**15.08**	9.57%	5.81%	**1.65**	2.69%	5.20%	**0.52**	0.70%	1.83%	**0.38**
Other NSW	5.91%	0.31%	**19.33**	2.84%	4.89%	**0.58**	0.99%	2.45%	**0.41**	0.17%	1.83%	**0.09**
ACT	0.88%	0.92%	**0.96**	0.44%	1.83%	**0.24**	0.16%	0.31%	**0.51**	0.04%	1.53%	**0.03**
Melbourne	15.84%	3.06%	**5.18**	6.70%	3.06%	**2.19**	2.10%	4.28%	**0.49**	0.57%	0.92%	**0.62**
Other VIC	4.50%	2.14%	**2.10**	2.04%	5.50%	**0.37**	0.67%	8.26%	**0.08**	0.13%	1.22%	**0.10**
Brisbane	6.19%	1.53%	**4.05**	2.70%	1.22%	**2.21**	0.95%	1.83%	**0.52**	0.26%	0.92%	**0.28**
Other SE QLD	4.04%	3.36%	**1.20**	1.70%	3.06%	**0.56**	0.56%	5.81%	**0.10**	0.13%	1.53%	**0.09**
Adelaide	3.87%	1.22%	**3.16**	1.25%	1.53%	**0.81**	0.50%	2.14%	**0.23**	0.13%	2.45%	**0.05**
Other SA	1.43%	2.75%	**0.52**	0.61%	4.89%	**0.12**	0.24%	6.12%	**0.04**	0.04%	3.06%	**0.01**

Weightings applied for combined sample 2018 (Chapter 2 NEM level findings)

	Non employing			1-4 Employees			5-19 Employees			20-199 Employees		
	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor	% Population	% Sample	Factor
Sydney	16.8%	1.8%	**9.43**	8.7%	4.3%	**2.04**	2.5%	6.4%	**0.38**	0.6%	3.6%	**0.18**
Other NSW	5.4%	1.9%	**2.83**	2.6%	3.3%	**0.78**	0.9%	2.4%	**0.38**	0.2%	0.8%	**0.19**
ACT	0.8%	1.7%	**0.48**	0.4%	1.4%	**0.28**	0.1%	1.8%	**0.08**	0.0%	0.7%	**0.05**
Melbourne	14.5%	1.7%	**8.67**	6.1%	5.2%	**1.17**	1.9%	6.5%	**0.29**	0.5%	2.6%	**0.20**
Other VIC	4.1%	1.4%	**2.87**	1.9%	2.3%	**0.82**	0.6%	0.8%	**0.73**	0.1%	0.6%	**0.20**
Brisbane	5.6%	2.4%	**2.37**	2.5%	3.8%	**0.65**	0.9%	3.6%	**0.24**	0.2%	2.1%	**0.11**
Other SE QLD	3.7%	0.7%	**5.16**	1.6%	1.4%	**1.09**	0.5%	1.4%	**0.36**	0.1%	1.3%	**0.09**
Rest of QLD	4.3%	1.5%	**2.77**	1.7%	2.5%	**0.69**	0.7%	1.5%	**0.45**	0.2%	2.5%	**0.06**
Adelaide	3.5%	2.9%	**1.23**	1.1%	3.6%	**0.32**	0.5%	5.0%	**0.09**	0.1%	2.3%	**0.05**
Other SA	1.3%	0.7%	**1.83**	0.6%	1.3%	**0.42**	0.2%	0.4%	**0.61**	0.0%	0.8%	**0.05**
Hobart	0.7%	0.4%	**2.03**	0.3%	1.1%	**0.29**	0.1%	0.7%	**0.20**	0.0%	0.8%	**0.05**
Other TAS	0.4%	0.6%	**0.69**	0.2%	1.3%	**0.13**	0.1%	1.2%	**0.07**	0.0%	0.8%	**0.02**

Appendix B – Questionnaires

CATI Questionnaire

QMS ONLINE QUESTIONNAIRE
Australian Energy Market Commission
SME Survey

Project No: AEMC0001	**Project Name**: Small business (SME) survey
Main Client Service Contacts: James Wunsch, Stathi Karavias	
Other Client Service Team Members: Edward McCarthy, Adrian Knight	
Issue Date: 29.1.18	

1. Background Information

Established in 2005 by the Council of Australian Governments (COAG), The Australian Energy Market Commission (AEMC) is responsible for making rules which govern the nation's electricity and natural gas markets. In doing so, AEMC aims to protect the interests of consumers by promoting healthy retail competition within these markets.

The AEMC's annual Retail Competition Review represents a key tool for assessing whether the energy market is operating effectively. As the retail energy markets have become deregulated, the 2017 Review focused on how competition has developed within these markets and whether this is creating beneficial outcomes for consumers.

Insights from the current survey with small business consumers will feed into the 2018 Retail Competition Review and its assessment of energy market operations.

2. Schedule / Timing

Survey programmed and tested: 28 January-5 February

Survey fieldwork: 6 February – 16 February

3. Sample / Recruiting Specifications / Quotas

This is the CATI version of the questionnaire. An online version will also be created.

Sample frame:

- All participants to be the main or joint decision maker in their business when it comes to choosing their energy retailer.

Quotas below are a combination of both proportionate and representative sampling.

State	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
SME	73	73	37	73	73	37	37	400
Location within State	**VIC**	**NSW**	**ACT**	**SA**	**S/E QLD**	**Rest of QLD**	**TAS**	**Total**
Capital city	55	47	37	56	49	0	16	224
Rest of region	18	26		17	24	37	21	176

Business size	Total
Non-employing	60
1-4 employees	100
5-19 employees	100
20-100 employees	100
101-199 employees	40
Total	400

Business Type	Total
Construction	66
Professional, Scientific and Technical Services	48
Rental, Hiring and Real Estate Services	44
Financial and Insurance Services	36
Agriculture, Forestry and Fishing	33
Transport, Postal and Warehousing	25
Retail Trade	24
Health Care and Social Assistance	23
Accommodation and Food Services	17
Manufacturing	15
Administrative and Support Services	15
Wholesale Trade	14
Education and Training	5
Arts and Recreation Services	5

Information Media and Telecommunications	4
Mining	1
Public Administration and Safety	1
Electricity, Gas, Water and Waste Services	1
Other	22
Total	400

Minimum Targets	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
Has mains gas	25	15	11	15	7	0	0	73

4. Interview Length

20 minutes.

5.Annual electricity cost thresholds

Jurisdiction	Annual Electricity Cost Threshold
ACT	$30,000
NSW	$45,000
SE QLD	$36,000
Rest of QLD	$50,000
SA	$90,000
TAS	$55,000
VIC	$20,000

Introduction

Good morning / afternoon / evening, my name is [**SAY NAME**] and I'm calling on behalf of Q&A Research and Colmar Brunton Research, which are market and social research companies.

We're conducting an important survey on behalf of the Australian Energy Market Commission which advises governments on energy matters that can affect consumers.

May I please speak with the person in the business who is 18 or over and who is mainly or jointly responsible for choosing your organisation's energy company?

REINTRODUCE IF NECESSARY

This survey is for research purposes only; we are not selling anything and it should only take about 15-20 minutes. Are you happy to go ahead? **IF YES, PROCEED. IF NO, SEEK AN APPOINTMENT TIME TO CALL BACK.**

SAY ONLY IF NECESSARY: Your responses will be treated in complete confidence. This is a confidential survey and none of your responses will be linked to you in any way. We are conducting the survey with a random sample of businesses across Australia, in accordance with the Privacy Act, which means your responses must be kept strictly confidential.

IF NECESSARY: Read out the Privacy Act: The information and opinions you provide will be used only for research purposes. You cannot be identified individually in any way through this survey. Results will be held as strictly confidential – according to the Code of Professional Behaviour set out by the Australian Market & Social Research Society and the Privacy Legislation.

[**IF NECESSARY:** If you would like to check the integrity of our research company and ensure we are not selling anything, you can call Surveyline on 1300 364 830. Surveyline is a national phone line that allows members of the public to check the integrity of research companies.]

[**IF NECESSARY:** If you would like to call the Australian Energy Market Commission to verify this research you can call (02) 8296 7800 and ask to speak to Prabpreet Calais.]

SAY TO ALL: It may be helpful to have your most recent energy bills handy, but this is not essential. During the course of this interview, my supervisor may listen in to check the quality of my work.

IF NECESSARY: The purpose of the recording is to check that I have conducted the survey correctly.

Screening / qualifier questions

I just have a few questions about your business to make sure we are speaking with a good mix of energy consumers.

S1. **DELETED FOR BUS SURVEY PRE 2017**	

S2. What is your postcode there? **CHECK QUOTAS**	1. ____ ENTER POSTCODE **AUTOCODE LOCATION**

S3. **RECORD GENDER**	1. Male 2. Female

S4. **DELETED FOR BUS SURVEY PRE 2017**	

D2. **Including** you, how many employees does your business have? **ALLOW FIVE DIGIT RESPONSE. DO NOT ALLOW 0. CHECK QUOTAS. IF RESPONDENT UNSURE, PROMPT FOR MOST ACCURATE ESTIMATE.**	_____

D12. What would you say is your industry or primary purpose of business there? **SINGLE RESPONSE. CHECK QUOTAS**	1. Construction 2. Professional, Scientific and Technical Services 3. Rental, Hiring and Real Estate Services 4. Agriculture, Forestry and Fishing 5. Financial and Insurance Services 6. Retail Trade 7. Transport, Postal and Warehousing 8. Health Care and Social Assistance 9. Manufacturing 10. Accommodation and Food Services 11. Administrative and Support Services 12. Wholesale Trade 14. Mining 15. Electricity, Gas, Water and Waste Services 16. Information Media and Telecommunications 17. Public Administration and Safety 18. Education and Training 19. Arts and Recreation Services 13. Other (specify)

D2a. What are your business' main operating hours? **SINGLE RESPONSE, READ OUT**	1. General office hours (e.g. 9am-5pm) 2. Morning (e.g. 4am – 12pm) 3. Night (e.g. 6pm – 4am) 4. 24 hours 5. Other (specify) ____ 6. Can't say

D3a. How often does your business receive your electricity bill? **IF THEY SAY THEY HAVE A PAYMENT ARRANGEMENT:** How often does your main bill arrive from the electricity company? **SINGLE RESPONSE, DO NOT READ OUT**	1. Monthly 2. Bi-monthly / every 2 months 3. Quarterly / every 3 months 4. Other (specify) ____ 5. Don't know

D3. How much was your business' most recent electricity bill? **IF NECESSARY:** Your best estimate is fine. **SINGLE RESPONSE, DO NOT READ OUT**	1. $_______ 2. Don't know 3. Refused

NEW QUESTION

X.1 HIDDEN QUESTION. CALCULATE EQUIVALENT ANNUAL ELECTRICITY BILL AMOUNT FROM D3 AND D3A. CHECK QUOTAS AND CLOSE IF ABOVE THE THRESHOLD FOR THAT JURISDICTION.

D3b. What is your business' annual electricity usage in terms of Kilowatt hours (kWh)? Note: Kilowatt hours is a measure of electricity equal to 1000 watt hours. It is the unit measure used on your electricity bill. **IF NECESSARY:** Your best estimate is fine. **SINGLE RESPONSE, DO NOT READ OUT**	1. 1-19,000 kWh 2. 20,000 kWh – 39,000 kWh 3. 40,000 kWh – 59,000 kWh 4. 60,000 kWh – 79,000 kWh 5. 80,000 kWh – 99,000 kWh 6. 100,000 kWh or more 7. Don't know 8. Refused

Q5. Does your business currently have piped natural gas – and by that I mean mains connected gas, not bottled gas? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

IF HAS GAS CONNECTED (Q5=1)

D4a. How often does your business receive your gas bill? IF THEY SAY THEY HAVE A PAYMENT ARRANGMENT: How often does your bill arrive from the gas company? SINGLE RESPONSE, DO NOT READ OUT	1. Monthly 2. Bi-monthly / every 2 months 3. Quarterly / every 3 months 4. Other (specify) _____ 5. Don't know

IF HAS GAS CONNECTED (Q5=1)

D4. How much was your business's most recent gas bill? IF NECESSARY: Your best estimation of the cost is fine. SINGLE RESPONSE, DO NOT READ OUT	1. $___ _ _ _ _ _ 2. Don't know 3. Refused

CLOSING SPIEL: Thank you for your time today. We have already surveyed enough businesses with your characteristics, so that is all of my questions.

Main Survey – About the business

Now for the main questions. We'll start with some questions about your energy company. For the remainder of the survey, please answer all questions **on behalf of your business or organisation**.

Q68. Embedded networks are private electricity networks that are found in some shopping centres and office buildings. In these networks, the property owner typically chooses the electricity provider rather than the occupants and bills are sometimes also bundled with gas or water charges. Based on this information, is your business or organisation part of an embedded network?	1. Yes 2. No 3. Don't know

Q1. What is the name of the company that you receive a bill from for your electricity use? **SINGLE RESPONSE, DO NOT READ OUT** **DP PLEASE SHOW LIST IN ALPHABETICAL ORDER BUT KEEP ORIGINAL CODES**	43. 1st Energy 4. ActewAGL 5. AGL Energy 6. Alinta Energy **7. REMOVED** 24. Aurora Energy 8. BlueNRG 9. Click Energy 25. Commander Power and Gas 28. CovaU 10. Diamond Energy 11. Dodo Power and Gas 33. ElectrAG 12. EnergyAustralia 34. Energy Locals 35. Enova Energy 13. Ergon Energy 26. ERM Power 29. GloBird Energy 27. **REMOVED IN 2017**

	14. Lumo Energy 15. Momentum Energy 36. Mojo Power 16. Neighbourhood Energy 40. Next business energy 41. Online power and gas 17. Origin Energy 30. Pacific Hydro Retail 18. People Energy 31. Pooled Energy 19. Powerdirect 20. Powershop Australia 21. QEnergy 22. Red Energy 23. Sanctuary Energy 37. Savant Energy Power Networks 24. Simply Energy 44. Sorted services 38. SparQ 32. Sumo Power 39. Tango Energy 42. Bill comes from embedded network service provider 25. Other (specify)__________ 26. Don't know

IF HAS GAS CONNECTED (Q5=1)

Q6. What is the name of the company you receive a bill from for your mains connected gas use? **SINGLE RESPONSE, DO NOT READ OUT** **DP PLEASE SHOW LIST IN ALPHABETICAL ORDER BUT KEEP ORIGINAL CODES**	1. ActewAGL Retail 2. AGL Energy 3. Alinta Energy 14. Aurora Energy 4. REMOVED 15. Click Energy 16. CovaU 5. Dodo Power and Gas 6. Energy Australia 7. Lumo Energy 17. Momentum Energy 8. Origin Energy 9. Red Energy 10. Simply Energy 13. Tas Gas Retail 18. Weston Energy

	19. WINconnect 20. Bill comes from embedded network service provider 11. Other (specify)________________ 12. Don't know

Q2. **IF Q5=2 OR 3 OR COMPANY SELECTED AT Q1≠COMPANY AT Q6** Overall, how satisfied are you with your business's current electricity company? **SINGLE RESPONSE, READ OUT** **IF COMPANY SELECTED AT Q1=COMPANY AT Q6** Overall, how satisfied are you with your business's current energy company? **SINGLE RESPONSE, READ OUT** **IF NECESSARY: [INSERT FROM Q1]**	1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. **DNR:** Don't know

Q3. **IF Q5=2 OR 3 OR COMPANY SELECTED AT Q1≠COMPANY AT Q6** How would you rate the overall <u>quality of customer service</u> provided by your business's <u>electricity company</u>? Please use a scale where 0 means very poor and 10 is excellent.

IF COMPANY SELECTED AT Q1=COMPANY AT Q6
How would you rate the overall quality of customer service provided by your business's <u>energy company</u>? Please use a scale where 0 means very poor and 10 is excellent.

SINGLE RESPONSE

Very poor										Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q4. **IF Q5=2 OR 3 OR COMPANY SELECTED AT Q1≠COMPANY AT Q6** And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's electricity company?

IF COMPANY SELECTED AT Q1=COMPANY AT Q6
And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's energy company?

REPEAT SCALE IF NECESSARY, SINGLE RESPONSE

Very poor	Excellent	Don't Know

☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

ASK IF Q4=0-10

IF Q5=1 AND COMPANY SELECTED AT Q1≠COMPANY AT Q6 ASK Q7-Q9b

Q7. Overall, How satisfied are you with your business's current gas company? **SINGLE RESPONSE, READ OUT** **IF NECESSARY: [INSERT FROM Q6]**	1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. **DNRO:** Don't know

Q8. How would you rate the overall quality of customer service provided by your business's <u>gas company</u>? Please use a scale where 0 means very poor and 10 is excellent.
SINGLE RESPONSE

Very poor										Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Q9. Using the same scale, how would you rate the overall value for money of the products and services provided by your business's gas company? **REPEAT IF NECESSARY**

Very poor										Excellent	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

Interest and Knowledge

ASK ALL

Just a reminder, for the following questions, to please answer from the perspective of your business or organisation.

Q10. **QUESTION REMOVED IN 2015**	
Q11. **QUESTION REMOVED IN 2015**	
Q12. **QUESTION REMOVED IN 2015**	

Q13. Please tell me whether you think the following statements are True or False. Firstly, … **READ NEXT ITEM**

RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM	True	False	Don't know
a. Businesses in your state [or territory - if ACT] or territory can choose their electricity company	1	2	3
b. **IF HAS GAS (Q5=1)** Businesses in your state [or territory - if ACT] or territory can choose their gas company	1	2	3
c. Businesses in your state [or territory - if ACT] can choose from a range of different types of electricity plans, price structures, contract lengths and terms	1	2	3
d. **IF HAS GAS (Q5=1)** Businesses in your state [or territory - if ACT] can choose from a range of different types of gas plans, price structures, contract lengths and terms	1	2	3

Q14. **QUESTION REMOVED**	
Q15. **QUESTION REMOVED**	

ASK ALL

Q46. **QUESTION REMOVED IN 2017**	

ASK ALL

Q65. Do you know if or when your electricity contract or plan expires? **SINGLE RESPONSE**	1. It has already expired 2. It doesn't have an expiry date 3. In the next 6 months 4. In the next 12 months 5. In the next 2 years 6. It runs for more than 2 years 7. Don't know

ASK ALL

Q66. Did you actively choose to be on this particular contract or plan? **SINGLE RESPONSE**	1. Yes, I chose it 2. No, I was just put on it 3. **DNRO**: Something else (specify)_____ 4. **DNRO:** Don't know

ASK ALL

Q66a. Businesses can often choose to be charged a fixed price for their electricity over a given period; or be charged based on the volume of electricity consumed (and/or the time the electricity is consumed). Which of the following best describes your current billing situation? **SINGLE RESPONSE. READ OUT.**	1. Fixed price over a given period 2. Payment based on volume of electricity consumed (regardless of time, i.e. peak / non-peak periods) 3. Payment based on volume and time electricity is consumed (peak / non-peak periods) 4. **DNRO**: Something else (specify)_____ 5. **DNRO:** Don't know

ASK ALL

Q70. Does your business' electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

Q71. **ONLINE ONLY**	

Q72. **ONLINE ONLY**	

ASK IF HAVE MAINS GAS (Q5=1)

Q74. Do you know if or when your gas contract or plan expires? **SINGLE RESPONSE**	1. It has already expired 2. It doesn't have an expiry date 3. In the next 6 months 4. In the next 12 months 5. In the next 2 years 6. In more than 2 years 7. Don't know

ASK IF HAVE MAINS GAS (Q5=1)

Q75. Did you actively choose to be on this particular contract or plan? **SINGLE RESPONSE**	1. Yes, I chose it 2. No, I was just put on it 3. **DNRO:** Something else (specify)_____ 4. **DNRO:** Don't know

ASK IF HAS MAINS GAS (Q5=1)

Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

Q77. **ONLINE ONLY**	

ASK ALL

Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state [or territory - if ACT]? **SINGLE RESPONSE, READ OUT**	1. Very satisfied 2. Somewhat satisfied 3. Neither satisfied nor dissatisfied 4. Somewhat dissatisfied 5. Very dissatisfied 6. **DNR:** Don't know

Price Increases

ASK ALL

Q80. Have you had any energy bills in the last few years where the amount really surprised or shocked you? **SINGLE RESPONSE**	1. Yes 2. No 3. Can't recall

ASK IF Q80=1

Q81. The last time this happened, how different was it from your normal bills? **SINGLE RESPONSE. READ OUT.**	1. Higher 2. Lower 3. Don't know

ASK IF Q81=1 OR 2

Q81a. How much [Insert 'higher' or 'lower' – based on response to Q81] was it from your normal bills, in dollar terms? **NUMERICAL, ALLOW 1-999,999**	1. $___ 2. Don't know

NEW QUESTIONS – RESPONSES TO PRICE INCREASES

ASK IF Q81=1

Q82. You have indicated that your last bill surprised or shocked you as it was higher than a normal bill. What do you think is the main reason for this price increase? **MULTIPLE RESPONSE OK. READ OUT.**	1. A market increase in the retail cost of energy. 2. An increase in your business's energy consumption. 3. Other (specify). 4. Don't know.

ASK IF Q81=1

Q83. How has your business responded to the increased cost of energy? What action(s), if any, has your business taken? **MULTIPLE RESPONSE OK. READ OUT.**	1. Absorbed the price rise with no real action as yet. 2. Passed the price rise on to consumers. 3. Made efforts to reduce energy consumption. 4. Invested in renewables / alternative energy supply. 5. Switched retailers. 6. Looking to switch retailers. 7. Other (specify). 8. Don't know.

Q60. Relative to that last electricity bill, how much money would you need to save in order to seriously consider changing your business' company or plan? **IF NECESSARY:** Your best estimate is fine. **Interviewer note:** if says 'any saving would be good' (or similar) **PROMPT**: so would a $1 saving be enough or are you thinking a higher amount to seriously consider changing?	**1. REPLACED IN 2017/18** **2. $_ _ _**

IF HAS GAS (Q5=1)

Q61. Relative to that last gas bill, how much money would you need to save to seriously consider changing your business' company or plan? **IF NECESSARY:** Your best estimate is fine. **Interviewer note:** if says 'any saving would be good' (or similar) **PROMPT**: so would a $1 saving be enough or are you thinking a higher amount to seriously consider changing?	**1. REPLACED IN 2017/18** **2. $_ _ _**

Switching Behaviours

ASK ALL IN S/E QLD, VIC, NSW, SA, ACT, BUT NOT TAS OR REST OF QLD (GO TO Q34)

Q17. A. In the past 5 years, how many times has your business changed the following? **ASK Q17B IMMEDIATELY AFTER EACH CODE IF Q17A NOT ZERO AT EACH** B) **IF Q17A=1**: And was that in the last 12 months? **IF Q17A>1** And of those [INSERT from Q17A] times how many were in the past 12 months? **READ OUT** **FOR EACH ITEM, ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99, INCLUDE N/A and D/K** **DO NOT RANDOMISE 1-4**	1. Your electricity company _ _ 2. From one electricity plan or deal to another offered by the same electricity company _ _ 3. **IF HAS GAS (Q5=1)** Your gas company _ _ 4. **IF HAS GAS (Q5=1)** From one gas plan or deal to another offered by the same gas company _ _

Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas? **DO NOT READ OUT**	1. Yes 2. No 3. Cannot recall

ASK IF Q18=1

Q18B. In what ways was your business approached by an energy company? **DO NOT READ OUT, RECORD BEST FIT, MULTIPLE RESPONSE OK**	1. Someone came to my premises 2. Received a call 3. Letter in the mail 4. Brochures / flyers in the mail 5. Email 6. Some other way (specify)_______ 7. Don't know

Q18C. Generally speaking, to what extent do you agree or disagree with each of the following statements in relation to marketing and information from energy retailers?

RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
a. Energy retailers are overly aggressive in their marketing practices.	1	2	3	4	5	6

b. Energy retailers do not market themselves or their offers strongly enough.	1	2	3	4	5	6

Q19. **QUESTION REMOVED IN 2017**	

ASK ALL

Q20. In the past 12 months, have <u>you actively</u> investigated different energy offers or options that you could potentially switch to?	1. Yes 2. No 3. Don't know

Q20b. **QUESTION REMOVED IN 2017**	

Q21. **QUESTION REMOVED IN 2015**	

Switching Electricity

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0). IF NOT SWITCHED, SKIP to Q32

Q22. The last time you switched, what was the main reason you changed your business' energy company, plan or deal? Any other reasons? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Price related – wanted / offered a better price 2. **[MERGED WITH 1 IN 2018]** 3. **REMOVED IN 2017** 4. **REMOVED IN 2018** 5. **REMOVED IN 2017** 6. **[MERGED WITH 1 IN 2018]** 7. **REMOVED IN 2017** 8. Came to the end of my existing contract and wanted to change 9. Moved business premises 10. **[MERGED WITH 9 IN 2018]** 11. Unhappy with customer service / company 12. **REMOVED IN 2017** 13. **REMOVED IN 2017** 14. Wanted to have gas and electricity with the same company 15. **REMOVED IN 2017** 16. **REMOVED IN 2017** 17. **[MERGED WITH 25 IN 2018]** 26. **REMOVED IN 2017** 18. **REMOVED IN 2017** 19. **[MERGED WITH 25 IN 2018]** 20. **REMOVED IN 2017** 21. **REMOVED IN 2017** 22. **REMOVED IN 2017** 25. Wanted / was offered green power, solar panels or a good solar rebate 27. Preferred billing / payment arrangements 28. My previous company decreased the solar feed-in tariff 29. **[MERGED WITH 27 IN 2018]** 23. Other (specify)_______ 24. Don't know

Q47. **QUESTION REMOVED IN 2017**	

Q48. **QUESTION REMOVED**	

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all and 10 means extremely important? **RANDOMISE, REPEAT IF NECESSARY, ADD CODE 12=Not Applicable**

a) **REMOVED IN 2017**
b) The estimated total bill amount
c) **REMOVED IN 2017**
d) Whether you are locked into a contract
e) The discounts offered
f) **REMOVED ITEM**
g) Availability of green / renewable energy plans
h) The solar feed-in tariff offered by the company
i) Whether the price can change during the contract
j) **ITEM REMOVED IN 2017**
k) **ITEM REMOVED IN 2017**
l) **ITEM REMOVED IN 2017**
m) **REMOVED IN 2017**
n) The brand and reputation of the company
o) The ability to purchase or access technologies such as solar panels, energy storage batteries, live energy use data or energy management systems
p) The company offered an upgraded meter
q) The customer service on offer
r) Bonus rewards such as gym memberships, frequent flyer points or shopping vouchers

Not at all important										Extremely important	Don't Know	Not Applicable
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11	☐ 12

Q24. QUESTION REMOVED	

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q50. And having switched your business's energy company, plan or deal, to what extent do you agree or disagree with the following? For each one, tell me if you agree or disagree strongly or just somewhat.

IF NECESSARY: Please just think about the last time you switched **RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM**

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
c. The last time I switched I was happy with the decision	1	2	3	4	5	6
d. **ITEM REMOVED**	1	2	3	4	5	6
e. **ITEM REMOVED**	1	2	3	4	5	6
f. I was satisfied with the process involved in switching	1	2	3	4	5	6
g. I was confident in the decision to switch as there was sufficient and transparent information available regarding energy offers	1	2	3	4	5	6

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q51. The last time you switched your business's energy company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? **SINGLE RESPONSE, READ OUT**	1. Very easy 2. Fairly easy 3. Neither easy nor difficult 4. Fairly difficult 5. Very difficult 6. **DNRO:** Don't know / can't recall 7.

SECTION DELETED IN 2017 (MERGED WITH ELECTRICITY)

Q25. QUESTION REMOVED	

Q26. **QUESTION REMOVED IN 2017**	

Q27. **QUESTION REMOVED IN 2017**	

Q52. **QUESTION REMOVED IN 2017**	

Q53. **QUESTION REMOVED**	

Q54. **QUESTION REMOVED IN 2017**	

Q28. **QUESTION REMOVED IN 2015**	

Q55. **QUESTION REMOVED IN 2017**	

Q30a. **QUESTION REMOVED IN 2017**	

Q30B. **QUESTION REMOVED IN 2017**	

Q56. **QUESTION REMOVED IN 2017**	

Q23. MOVED HERE FROM EARLIER IN THE SURVEY AND COMBINED WITH Q31

Q23. **ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)** The last time you changed your <u>energy</u> company, plan or deal, which information sources did you use to help with your decision? Any others? **ASK IF NOT SWITCHED BUT INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20 =1)** You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Did not use any information sources 2. Door-to-door sales person visiting the business 3. Received a call from a sales person 4. Phoned retailer 5. Brochures / flyers and other direct mail 6. Google / general internet search 7. Retailer website 8. Price comparison website (specify)_______ 9. A friend or family member/colleague/associate 10. **REMOVED IN 2017** 11. General advertising e.g. TV, Radio, Newspaper advertisement 12. **REMOVED IN 2017** 13. **REMOVED IN 2017** 14. **REMOVED IN 2017** 15. Looked at price / best price / saving 16. **REMOVED IN 2017** **17. REMOVED IN 2017** 20. Energy broker/adviser 21. Real estate moving service 22. Industry association or professional

	network 23. Other (specify)_______ 24. Don't know

Q31. **MERGED WITH Q23 IN 2017**	

Did not switch

ASK IF NOT SWITCHED (Q17A ALL CODES 1-4=0).

Q57. **QUESTION REMOVED IN 2017**	

Q58. **QUESTION REMOVED**	

Q32. **ASK IF NOT SWITCHED BUT INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20 =1)** You mentioned investigating different offers and options. What made you decide not to go on and change your business's energy company or plan in the last 12 months? Any other reasons? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK** **ASK IF NOT SWITCHED OR INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20=2 OR 3)** Are there any reasons you haven't investigated different options or changed your business's energy company or plan in the last 12 months? Any other reasons? **DO NOT READ OUT, RECORD BEST FIT**	1. No particular reason 2. Too busy / too much hassle / couldn't be bothered 3. **[MERGED WITH 2 IN 2018]** 4. Too confusing 5. Lack of information on best deals available 6. They are all the same / no significant price differentiation 7. **CODE REMOVED IN 2017** 8. **CODE REMOVED IN 2017** 9. No other options / alternatives available 10. I am on a contract 11. **CODE REMOVED IN 2017** 12. **CODE REMOVED IN 2017** 13. **[MERGED WITH 6 IN 2018]** 14. My existing company matched the offer / gave me a better offer so I stayed with them 15. Happy with current retailer / arrangement / plan 16. **CODE REMOVED IN 2017** 17. **CODE REMOVED IN 2017** 18. I don't trust what the energy companies say 19. **CODE REMOVED IN 2017** 20. **CODE REMOVED** 24. Did not want to lose my solar bonus / feed-in tariff 25. **CODE REMOVED IN 2017** 26. **CODE REMOVED IN 2017** 27. **[MERGED WITH 14 IN 2018]** 21. **CODE REMOVED IN 2017** 29. Did not want to pay reconnection fees 22. Other (specify)_______

MULTIPLE RESPONSE OK	23. Don't know

Q33. MERGED WITH Q32	

Future Intentions

ASK ALL

Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business? **SINGLE RESPONSE, READ OUT**	1. We are currently looking for a better deal 2. We would be interested in switching to a better deal but are not currently looking 6. We recently switched our business energy provider or plan and so probably won't look for a better deal for a while 3. We are not interested in switching our energy provider or plan 7. We have no other options available here / only one provider 4. **DNRO:** Other (specify)______ 5. **DNRO:** None of the above

Q34c. **QUESTION COMBINED WITH Q34B IN 2017**	

Q35. **QUESTION REMOVED IN 2015**	

ASK ALL

Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs? Please use a scale where zero means not at all and 10 is extremely confident **REPEAT SCALE IF NECESSARY, SINGLE RESPONSE**

Not at all confident										Extremely confident	Don't Know
☐ 0	☐ 1	☐ 2	☐ 3	☐ 4	☐ 5	☐ 6	☐ 7	☐ 8	☐ 9	☐ 10	☐ 11

ASK IF NOT SWITCHED OR INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20=2 OR 3)

Q37. If you wanted to look for information about different energy	1. I wouldn't look for information 2. Brochures, pamphlets

retailers or plans for your business, what would be your **MOST** preferred method or source of information? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK, RECORD FIRST MENTION**	3. Google 4. Energy retailer – phone call 5. Energy retailer – website 6. Energy retailer – door-to-door salesperson 7. Comparison website 8. Media 9. Word of mouth e.g. friend/family/colleague/associate 10. Financial counsellor 11. Community support organisation 12. General advertising e.g. TV, Radio, Newspaper advertisement 13. Outdoor advertising e.g. billboards, buses 16. A broker 14. Other (specify)_______ 15. Don't know

ASK ALL

Q59. Do you agree or disagree with the following statements? For each one, tell me if you agree or disagree strongly or just somewhat. Firstly...

RANDOMISE ITEMS. SINGLE RESPONSE PER ITEM

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
a. I generally don't trust energy companies that promise a better deal	1	2	3	4	5	6
b. I'm concerned that if I switch energy company or plan there might be hidden fees and charges	1	2	3	4	5	6
c. I would switch my energy company if I was not satisfied with my current company	1	2	3	4	5	6
d. I would prefer to try and save energy to reduce my bill than to seek out a better deal	1	2	3	4	5	6
e. The amount of money I could save is not worth the time and effort involved in switching	1	2	3	4	5	6
f. It is too complicated to try and compare the various options and offers available	1	2	3	4	5	6
g. **ITEM REMOVED**	1	2	3	4	5	6
h. I don't have the time or energy to think about switching	1	2	3	4	5	6
i. I require help in assessing the best energy deal for my business	1	2	3	4	5	6

Comparison Websites

ASK ALL

Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their business? Any others? **DO NOT READ OUT, RECORD BEST FIT** **MULTIPLE RESPONSE OK**	1. Choice 2. Choosi 38. Click compare connect 3. Compare The Market 30. Compare with us 31. Compare and connect 32. Connectnow 33. Direct connect 27. Electricity and gas comparison 4. Electricity Wizard 5. Energy watch 6. Energymadeeasy 28. EnergySave 34. Fast connect 7. goswitch 8. iSelect 9. Make it Cheaper 29. Mozo 35. My connect 10. Myenergyoffers 11. My Power Planner 12. One Big Switch 37. On the move

	24. Power in your hands 13. QCA Price Comparator **14. ITEM REMOVED** 15. Switch On 16. Switchwise 39. Take charge 17. U Choose 26. Victorian Energy Compare 18. youcompare 19. Your Choice 20. Yahoo Energy Comparison 25. yourenergy.nsw.gov.au 36. Your Porter 21. None of the above 22. Other (specify)_______ 23. Don't know

IF NSW / QLD / ACT / SA / TAS:

- **ASK IF NOT MENTIONED "energymadeeasy" (Q38 ≠ 6)**

Q39. Have you heard of the independent government comparator website called **IF NSW / QLD / ACT / SA/ TAS:** energymadeeasy? **SINGLE RESPONSE**	1. Yes 2. No 3. Don't know

IF VIC:

- **ASK IF NOT MENTIONED "My Power Planner" or "Victorian Energy Compare" (Q38 ≠ 11 or 26)**
- **SKIP TO D1 IF MENTIONED "My Power Planner" AND "Victorian Energy Compare" (Q38=11 and 26)**

Q40. Have you heard of the independent government comparator **[IF Q38≠11or 26]** websites Victorian Energy Compare or My Power Planner...? **[IFQ38≠26]** website Victorian Energy Compare...? **[IFQ38≠11]** website My Power Planner]...? **ALLOW MULTIPLE RESPONSE FOR CODES 1 AND 2 ONLY** **READ OUT CODES 1 AND 2**	1. Yes, Victorian Energy Compare 2. Yes, My Power Planner 3. No, neither of these 4. Don't know

Q62. QUESTION REMOVED	

IF NSW:

- **ASK IF NOT MENTIONED "yourenergy.nsw.gov.au" or "Power in Your Hands" (Q38 ≠ 24 or 25)**
- **SKIP TO D1 IF MENTIONED "yourenergy.nsw.gov.au" AND "Power in Your Hands" (Q38=24 and 25)**

Q63. Have you heard of the ... **[IF Q38≠24 or 25]** websites yourenergy.nsw.gov.au or the campaign Power in Your Hands ...? **[IFQ38≠25]** website **yourenergy.nsw.gov.au** ...? **[IFQ38≠24] campaign Power in Your Hands...?** **ALLOW MULTIPLE RESPONSE FOR CODES 1 AND 2 ONLY**	1. Yes, Power in your hands campaign 2. Yes, yourenergy.nsw.gov.au 3. No, neither of these 4. Don't know

IF QLD:

- **ASK IF NOT MENTIONED "EnergySave" (Q38 ≠ 28)**

Q82. Have you heard of the Queensland Government campaign called EnergySave?	1. Yes 2. No 3. Don't know

Demographics

I just have some questions about you and your business before we finish the survey. These are for analysis purposes only.

D1. Does your business own its premises there or are you leasing the premises? SINGLE RESPONSE	1. Own 2. Leasing 3. Other (please specify) ____

D5. REMOVED IN 2017 – MERGED WITH D5E	

D5c. REMOVED IN 2017 – MERGED WITH D5E	

D5d. REMOVED IN 2017 – MERGED WITH D5E	

D6. QUESTION REMOVED	

D6a. QUESTION REMOVED	

D23. QUESTION REMOVED IN 2017	

D28. QUESTION REMOVED IN 2017	

D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years. The options are: you already have this, or in the next two years you definitely will, probably will, might, probably won't or definitely won't have this. Firstly … a) Solar panels b) Solar hot water system c) Batteries for storing electricity d) An electric vehicle e) A digital interval meter, also known as a 'smart meter' f) An energy management system or provider which automatically controls your heating or cooling thermostat and appliances according to your settings g) An app that allows you to remotely control / adjust your appliances via your mobile phone SINGLE RESPONSE FOR EACH, REPEAT SCALE AS NEEDED	1. Already have 2. Definitely will 3. Probably will 4. Might 5. Probably won't 6. Definitely won't

D5f. Which of the following best describes your ownership arrangement of your business's **[insert technology]** – do you **[read out codes]**? **ASK FOR ANY ITEM WHERE CODE 1 WAS SELECTED AT D5E** a) Solar panels b) Solar hot water system c) Batteries for storing electricity d) Electric vehicle/s e) Digital interval meter, also known as a 'smart meter' f) Energy management system (SAY IF NECESSARY: which automatically controls your heating or cooling thermostat and appliances according to your settings) SINGLE RESPONSE FOR EACH, REPEAT SCALE AS NEEDED	1. Own it outright 2. Own it with a loan purchase 3. Lease it 4. Or something else (specify) _____ 5. Don't know

D29. In the last 12 months has your business experienced any financial difficulty in paying energy bills?	4. Yes – in the last 12 months 5. DNRO: Have in the past, more than 12 months ago 6. No / Never 7. Don't know

D30. On average, what is your business's annual turnover in dollar terms? Note: Your annual turnover is the total ordinary income you derive in the income year in the ordinary course of carrying on a business. It does not include the costs that the business incurs throughout the year. [SINGLE RESPONSE]	1. $0 to less than $200K 2. $200K to less than $500K 3. $500K to less than $2M 4. $2M to less than $5M 5. $5M to less than $10M 6. $10M or more

D31. Do you speak a language other than English at home? [SINGLE RESPONSE]	1. Yes 2. No

[IF D31=1]

D32. What language/s do you speak other than English at home? [OPEN ENDED]	NOTE LANGUAGE

[IF D31=1]

D33. Have you experienced any language barriers that have negatively impacted on your ability to… a) Understand your energy bill b) Consider an alternative energy company, plan or contract c) Consider investing in energy management or generation technology **SINGLE RESPONSE FOR EACH, REPEAT SCALE AS NEEDED**	1. Yes 2. No 3. Unsure

D34. Finally, what is your business's National Meter Identifier (NMI)? You can find your NMI on your electricity bill. Please note that providing your National Meter Identifier (NMI) is voluntary, and any information provided will be kept confidential. While the NMI is a unique identifier and may be used to assist in analysing a survey participant's energy use, both Colmar Brunton and the Australian Energy Market Commision will only be using the NMI information in a de-identified manner for the preparation of reports.	1. Note NMI [NUMERIC] 2. Don't know 3. Refused

Closing

That is all of my questions. Just to remind you, my name is **[INSERT INTERVIEWER NAME]** from Q&A Research. Could I please have your first name so that we can re-contact you if necessary as part of our quality control to validate that this interview actually took place? **RECORD**

And can I confirm that I have dialed **INSERT PHONE NUMBER?** Please be assured that your name and contact details will be removed from your responses to this survey once the validation period is finished. As mentioned earlier, this study is being conducted on behalf of the Australian Energy Market Commission and the results will be used to assess the effectiveness of retail competition in your state [or territory - if ACT] or territory.

IF NECESSARY: Just to remind you, your responses in this survey will be kept completely confidential and will be used only for market research purposes. As a market research company, we comply with the requirements of the Privacy Act. By law, your responses will in no way be linked with your customer account details. Should you need to contact us again please call us on 8789 4444. Thank you again for your time.

Online Questionnaire

QMS ONLINE QUESTIONNAIRE
Australian Energy Market Commission
SME Survey

Project No: AEMC0001	**Project Name**: Small business (SME) survey
Main Client Service Contacts: James Wunsch, Stathi Karavias	
Other Client Service Team Members: Edward McCarthy, Adrian Knight	
Issue Date: 06.2.18	

1. Background Information

Established in 2005 by the Council of Australian Governments (COAG), The Australian Energy Market Commission (AEMC) is responsible for making rules which govern the nation's electricity and natural gas markets. In doing so, AEMC aims to protect the interests of consumers by promoting healthy retail competition within these markets.

The AEMC's annual Retail Competition Review represents a key tool for assessing whether the energy market is operating effectively. As the retail energy markets have become deregulated, the 2017 Review focused on how competition has developed within these markets and whether this is creating beneficial outcomes for consumers.

Insights from the current survey with small business consumers will feed into the 2018 Retail Competition Review and its assessment of energy market operations.

2. Schedule / Timing

Survey programmed and tested: 7 February – 9 February

Survey fieldwork: 12 February – 22 February

3. Sample / Recruiting Specifications / Quotas

This is the online version of the questionnaire, adapted from a CATI version.

Sample frame:

- All participants to be the main or joint decision maker in their business when it comes to choosing their energy retailer.

Quotas below are a combination of both proportionate and representative sampling.

State	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
SME	73	73	37	73	73	37	37	400
Location within State	**VIC**	**NSW**	**ACT**	**SA**	**S/E QLD**	**Rest of QLD**	**TAS**	**Total**
Capital city	55	47	37	56	49	0	16	224
Rest of region	18	26		17	24	37	21	176

Business size	Total
Non-employing	70
1-4 employees	120
5-19 employees	120
20-100 employees	70
101-199 employees	20
Total	400

Business Type	Total
Construction	66
Professional, Scientific and Technical Services	48
Rental, Hiring and Real Estate Services	44
Financial and Insurance Services	36
Agriculture, Forestry and Fishing	33
Transport, Postal and Warehousing	25
Retail Trade	24
Health Care and Social Assistance	23
Accommodation and Food Services	17
Manufacturing	15
Administrative and Support Services	15
Wholesale Trade	14
Education and Training	5
Arts and Recreation Services	5

Information Media and Telecommunications	4
Mining	1
Public Administration and Safety	1
Electricity, Gas, Water and Waste Services	1
Other	22
Total	400

Minimum Targets	VIC	NSW	ACT	SA	S/E QLD	Rest of QLD	TAS	Total
Has mains gas	25	15	11	15	7	0	0	73

4. Interview Length

20 minutes.

5.Annual electricity cost thresholds

Jurisdiction	Annual Electricity Cost Threshold
ACT	$30,000
NSW	$45,000
SE QLD	$36,000
Rest of QLD	$50,000
SA	$90,000
TAS	$55,000
VIC	$20,000

Survey invitation email

Colmar Brunton is conducting an important survey on behalf of the Australian Energy Market Commission which advises governments on energy matters that can affect consumers.

This survey should be completed by the person in the business who is 18 or over and who is mainly or jointly responsible for choosing your organisation's energy company. The results will be used to assess the effectiveness of retail energy competition in your state.

The survey should only take about 15-20 minutes. Your responses will be treated in complete confidence. This is a confidential survey and none of your responses will be linked to you in any way. We are conducting the survey with a random sample of businesses across Australia, in accordance with the Privacy Act, which means your responses must be kept strictly confidential.

If you would like to check the integrity of our research company and ensure we are not selling anything, you can call Surveyline on 1300 364 830. Surveyline is a national phone line that allows members of the public to check the integrity of research companies.

If you would like to call the Australian Energy Market Commission to verify this research you can call (02) 8296 7800 and ask to speak to Prabpreet Calais.

It may be helpful to have your most recent energy bills handy, but this is not essential.

Screening / qualifier questions

Please answer the following questions about your business to make sure we are speaking with a good mix of energy consumers.

S5. Firstly, are you either mainly or jointly responsible for choosing your business's energy company? (SR)

CODE	
01	Yes
02	No [TERMINATE]

[TERMINATE IF 02 IN S5]

S2. What is your business's postcode there? **(SR)**

PROGRAMMING INSTRUCTION: NUMERICAL, AUTOCODE LOCATION, CHECK QUOTAS, ALLOW 4 DIGITS ONLY.

CODE	
01	_________ ENTER POSTCODE

[TERMINATE IF POSTCODE NOT WITHIN DESIRED STATES / TERRITORIES]

S3. Please indicate your gender below. **(SR)**

CODE	
01	Male
02	Female

D2. **Including** you, how many employees does your business have? If you are not sure, please just give your best estimate. Please enter a number, not text. **(SR)**

PROGRAMMING INSTRUCTION: NUMERICAL, ALLOW FIVE DIGIT RESPONSE, DO NOT ALLOW 0, USE TO CHECK QUOTAS

[NUMERIC]

D12. Which of the following best describes your industry or primary purpose of business there? **(SR)**

PROGRAMMING INSTRUCTION: CHECK QUOTAS

CODE	
01	Construction
02	Professional, Scientific and Technical Services
03	Rental, Hiring and Real Estate Services
04	Agriculture, Forestry and Fishing
05	Financial and Insurance Services
06	Retail Trade
07	Transport, Postal and Warehousing
08	Health Care and Social Assistance
09	Manufacturing
10	Accommodation and Food Services
11	Administrative and Support Services
12	Wholesale Trade
14	Mining
15	Electricity, Gas, Water and Waste Services
16	Information Media and Telecommunications
17	Public Administration and Safety
18	Education and Training
19	Arts and Recreation Services
13	Other (please specify)

D3a. How often does your business receive your electricity bill?

If you have a payment arrangement, how often does your bill arrive from the electricity company?

(SR)

CODE	
01	Monthly
02	Bi-monthly / every 2 months
03	Quarterly / every 3 months
06	Bi-annually / every 6 months
07	Annually / every 12 months
05	Don't know [TERMINATE]

D3. How much was your business's most recent electricity bill? Please refer to the bill if possible, otherwise your best estimate is fine. Note that the survey will stop here if you are not able to provide an indicative amount of your business's most recent electricity bill **(SR)**

CODE	
01	$[NUMERIC]
02	Don't know [TERMINATE]
03	I prefer not to say [TERMINATE]

X.1 HIDDEN QUESTION. CALCULATE EQUIVALENT ANNUAL ELECTRICITY BILL AMOUNT FROM D3 AND D3A. CHECK QUOTAS AND CLOSE IF ABOVE THE THRESHOLD FOR THAT JURISDICTION.

D3b. What is your business's annual electricity usage in terms of Kilowatt hours (kWh)? Your best estimate is fine.

Note: Kilowatt hours is a measure of electricity equal to 1000 watt hours. It is the unit measure used on your electricity bill. **(SR)**

CODE	
01	1-19,000 kWh
02	20,000 kWh – 39,000 kWh
03	40,000 kWh – 59,000 kWh
04	60,000 kWh – 79,000 kWh
05	80,000 kWh – 99,000 kWh
06	100,000 kWh or more
07	Don't know
08	I prefer not to say

D2a. What are your business's main operating hours? **(SR)**

CODE	
01	General office hours (e.g. 9am-5pm)
02	Morning (e.g. 4am – 12pm)
03	Night (e.g. 6pm – 4am)
04	24 hours
05	Other (please specify)
06	Can't say

Q5. Does your business currently have piped natural gas (mains connected gas, not bottled gas)? **(SR)**

CODE	
01	Yes
02	No
03	Don't know

IF HAS GAS CONNECTED (Q5=1)
Q4a. How often does your business receive your gas bill?

If you have a payment arrangement, how often does your bill arrive from the gas company? **(SR)**

CODE	
01	Monthly
02	Bi-monthly / every 2 months
03	Quarterly / every 3 months
06	Bi-annually / every 6 months
07	Annually / every 12 months
05	Don't know

IF HAS GAS CONNECTED (Q5=1)
D4. How much was your business's most recent gas bill? Your best estimation of the cost is fine. **(SR)**

CODE	
01	$[NUMERIC]
02	Don't know
03	I prefer not to say

GO TO CLOSING PAGE IF NOT MEET QUOTAS: Thank you for your time today. We have already surveyed enough businesses with your characteristics. Please close the survey.

Main Survey – About the business

The following questions relate to your business's energy company. For the remainder of the survey, please answer all questions **on behalf of your business or organisation**.

Q68. Embedded networks are private electricity networks that are found in some shopping centres and office buildings. In these networks, the property owner typically chooses the electricity provider rather than the occupants and bills are sometimes also bundled with gas or water charges.

Based on this information, is your business or organisation part of an embedded network? **(SR)**

CODE	
01	Yes
02	No
03	Don't know

Q1. What is the name of the company that you receive a bill from for your electricity use? **Please select one**.

PROGRAMMING INSTRUCTION: SHOW LIST IN ORDER BELOW AND KEEP ORIGINAL CODES

CODE	
43	1st Energy
01	ActewAGL
02	AGL Energy
03	Alinta Energy
24	Aurora Energy
05	BlueNRG
06	Click Energy
25	Commander Power and Gas
28	CovaU
07	Diamond Energy
08	Dodo Power and Gas
33	ElectrAG
09	EnergyAustralia
34	Energy Locals
35	Enova Energy
10	Ergon Energy
26	ERM Power
29	GloBird Energy
11	Lumo Energy
12	Momentum Energy
36	Mojo Power
13	Neighbourhood Energy
40	Next business energy
41	Online power and gas
14	Origin Energy
30	Pacific Hydro Retail
15	People Energy
31	Pooled Energy
16	Powerdirect
17	Powershop Australia
18	QEnergy
19	Red Energy
20	Sanctuary Energy
37	Savant Energy Power Networks
21	Simply Energy
44	Sorted services
38	SparQ
32	Sumo Power
39	Tango Energy
42	Bill comes from embedded network service provider
22	Other (please specify)
23	Don't know

IF HAS GAS CONNECTED (Q5=1)
Q6. What is the name of the company you receive a bill from for your mains connected gas use? **Please select one**.

PROGRAMMING INSTRUCTION: SHOW LIST IN ORDER BELOW AND KEEP ORIGINAL CODES

CODE	
01	ActewAGL Retail
02	AGL Energy
03	Alinta Energy
14	Aurora Energy
15	Click Energy
16	CovaU
05	Dodo Power and Gas
06	Energy Australia
07	Lumo Energy
17	Momentum Energy
08	Origin Energy

09	Red Energy
10	Simply Energy
13	Tas Gas Retail
18	Weston Energy
19	WINconnect
20	Bill comes from embedded network service provider
11	Other (please specify)
12	Don't know

IF Q5=2 OR 3 OR COMPANY SELECTED AT Q1≠COMPANY AT Q6, QUESTION TEXT SHOULD BE AS BELOW FOR Q2:
Q2. Overall, how satisfied are you with your business's current electricity company? **Please select one**.

IF COMPANY SELECTED AT Q1=COMPANY AT Q6, USE THE FOLLOWING QUESTION TEXT FOR Q2:
Q2. Overall, how satisfied are you with your business's current energy company? **Please select one**.

CODE	
01	Very satisfied
02	Somewhat satisfied
03	Neither satisfied nor dissatisfied
04	Somewhat dissatisfied
05	Very dissatisfied
06	Don't know

IF Q5=2 OR 3 OR COMPANY SELECTED AT Q1≠COMPANY AT Q6, USE FOLLOWING QUESTION TEXT FOR Q3:
Q3. How would you rate the overall quality of customer service provided by your business's electricity company, using the scale below where 0 means very poor and 10 means excellent? **(SR)**

IF COMPANY SELECTED AT Q1=COMPANY AT Q6, USE THIS ALTERNATIVE QUESTION TEXT FOR Q3:
Q3. How would you rate the overall quality of customer service provided by your business's energy company, using the scale below where 0 means very poor and 10 means excellent? **(SR)**

Very poor										Excellent	Don't know
0	1	2	3	4	5	6	7	8	9	10	11

IF Q5=2 OR 3 OR COMPANY SELECTED AT Q1≠COMPANY AT Q6, USE THE FOLLOWING QUESTION TEXT FOR Q4:

Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's electricity company? **(SR)**

IF COMPANY SELECTED AT Q1=COMPANY AT Q6, USE THIS ALTERNATIVE QUESTION TEXT FOR Q4:

Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's energy company? **(SR)**

Very poor										Excellent	Don't know
0	1	2	3	4	5	6	7	8	9	10	11

IF Q5=1 AND COMPANY SELECTED AT Q1≠COMPANY AT Q6, ASK Q7-Q9

Q7. Overall, how satisfied are you with your business's current gas company? **(SR)**

CODE	
01	Very satisfied
02	Somewhat satisfied
03	Neither satisfied nor dissatisfied
04	Somewhat dissatisfied
05	Very dissatisfied
06	Don't know

Q8. How would you rate the overall quality of customer service provided by your business's gas company, using the scale below where 0 means very poor and 10 means excellent? **(SR)**

Very poor										Excellent	Don't know
0	1	2	3	4	5	6	7	8	9	10	11

Q9. Using the same scale, how would you rate the overall value for money of the products and services provided by your business's gas company?

Very poor										Excellent	Don't know
0	1	2	3	4	5	6	7	8	9	10	11

Interest and Knowledge

ASK ALL

Just a reminder: for the following questions, please answer from the perspective of your business or organisation.

Q13. Please indicate whether you believe each of the following statements to be True or False.

Please select one answer per row. **(SR PER ITEM)**

PROGRAMMING INSTRUCTION: RANDOMISE ITEMS

	True	False	Don't know
a. Businesses in your state **[or territory - IF ACT]** can choose their electricity company	01	02	03
b. **IF HAS GAS (Q5=1)** Businesses in your state **[or territory - IF ACT]** can choose their gas company	01	02	03
c. Businesses in your state **[or territory - IF ACT]** can choose from a range of different types of electricity plans, price structures, contract lengths and terms	01	02	03
d. **IF HAS GAS (Q5=1)** Businesses in your state **[or territory - IF ACT]** can choose from a range of different types of gas plans, price structures, contract lengths and terms	01	02	03

ASK ALL
Q65. Do you know if or when your business' electricity contract or plan expires? **(SR)**

CODE	
01	It has already expired
02	It doesn't have an expiry date
03	In the next 6 months
04	In the next 12 months
05	In the next 2 years
06	It runs for more than 2 years
07	Don't know

ASK ALL
Q66. Did you actively choose to be on this particular contract or plan? **(SR)**

CODE	
01	Yes, I chose it
02	No, I was just put on it
03	Other (please specify)
04	Don't know

ASK ALL
Q66A. Businesses can often choose to be charged a fixed price for their electricity over a given period; or be charged based on the volume of electricity consumed (and/or the time the electricity is consumed).

Which of the following best describes your current billing situation? **(SR)**

CODE	
01	Payment reflects a fixed price over a given period
02	Payment based on volume of electricity consumed (regardless of time, i.e. peak / non-peak periods)
03	Payment based on volume and time electricity is consumed (peak / non-peak periods)
04	Other (please specify)
05	Don't know

ASK ALL
Q70. Does your business's electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? **(SR)**

CODE	
01	Yes
02	No
99	Don't know

ASK IF HAVE MAINS GAS (Q5=1)
Q74. Do you know if or when your gas contract or plan expires? **(SR)**

CODE	
01	It has already expired
02	It doesn't have an expiry date
03	In the next 6 months
04	In the next 12 months
05	In the next 2 years
06	In more than 2 years
07	Don't know

ASK IF HAVE MAINS GAS (Q5=1)
Q75. Did you actively choose to be on this particular gas contract or plan? **(SR)**

CODE	
01	Yes, I chose it
02	No, I was just put on it
03	Other (please specify)
04	Don't know

ASK IF HAS MAINS GAS (Q5=1)
Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? **(SR)**

CODE	
01	Yes
02	No
99	Don't know

ASK ALL
Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state **[or territory - IF ACT]**? **(SR)**

CODE	
01	Very satisfied
02	Somewhat satisfied
03	Neither satisfied nor dissatisfied
04	Somewhat dissatisfied
05	Very dissatisfied
06	Don't know

Price Increases

ASK ALL
Q80. Have you had any energy bills in the last few years where the amount really surprised or shocked you? **(SR)**

CODE	
01	Yes
02	No
03	Can't recall

ASK IF Q80=1
Q81. The last time this happened, how different was it from your normal bills? **(SR)**

CODE	
01	Higher
02	Lower
03	Don't know

ASK IF Q81=1 OR 2
Q81a. How much [Insert 'higher' or 'lower' – based on response to Q81] was it from your normal bills, in dollar terms? **(SR)**

PROGRAMMING INSTRUCTION: NUMERICAL, ALLOW 1-999,999

CODE	
01	$[NUMERIC]
02	Don't know

NEW QUESTIONS – RESPONSES TO PRICE INCREASES

ASK IF Q81=1
Q83. You have indicated that your last bill surprised or shocked you as it was higher than a normal bill. What do you think is the main reason for this price increase? Please select all that apply. **(MR)**

CODE	
01	A market increase in the retail cost of energy
02	An increase in your business's energy consumption
03	Other (please specify)
04	Don't know [EXCLUSIVE]

ASK IF Q81=1
Q84. How has your business responded to the increased cost of energy? What action(s), if any, has your business taken? Please select all that apply. **(MR)**

CODE	
01	Absorbed the price rise with no real action as yet
02	Passed the price rise on to consumers.
03	Made efforts to reduce energy consumption
04	Invested in renewables / alternative energy supply
05	Switched retailers
06	Looking to switch retailers
07	Other (please specify)
08	Don't know [EXCLUSIVE]

ASK ALL

Q60. Relative to that last electricity bill, how much money would you need to save in order to seriously consider changing your business's electricity company or plan? Your best estimate is fine.

If you would seriously consider changing your business's electricity company or plan even with a small saving, please indicate that amount.

PROGRAMMING INSTRUCTION: NUMERICAL, ALLOW 1-999,999

$[NUMERIC]

ASK IF HAS GAS (Q5=1)
Q61. Relative to that last gas bill, how much money would you need to save to seriously consider changing your business's gas company or plan? Your best estimate is fine.

If you would seriously consider changing your business's gas company or plan even with a small saving, please indicate that amount.
PROGRAMMING INSTRUCTION: NUMERICAL, ALLOW 1-999,999

$[NUMERIC]

Switching Behaviours

ASK ALL IN S/E QLD, VIC, NSW, SA, ACT, BUT NOT TAS OR REST OF QLD (GO TO Q34)
Q17A. In the past 5 years, how many times has your business changed the following?

If there has been no change, please enter '0'.

PROGRAMMING INSTRUCTION: DO NOT RANDOMISE CODES 01-04

NUMERICAL CODES 0-99 ACCEPTED FOR 01 TO 04.

CODE		Number of changes in the past 5 years	Don't know	N/A
01	Your electricity company	________	100	101
02	From one electricity plan or deal to another offered by the same electricity company	________	100	101
03	**IF HAS GAS (Q5=1)** Your gas company	________	100	101
04	**IF HAS GAS (Q5=1)** From one gas plan or deal to another offered by the same gas company	________	100	101

ASK Q17B OR Q17C IMMEDIATELY AFTER EACH CODE IF Q17A NOT ZERO AT EACH

ASK IF Q17A_01=1
Q17B_1. You mentioned that your business changed its electricity company in the last 5 years. Was that in the last 12 months?

CODE	
01	Yes
02	No
03	Don't know

ASK IF Q17A_02=1
Q17B_2. You mentioned that your business changed its electricity plan from the same company in the last 5 years. Was that in the last 12 months?

CODE	
01	Yes
02	No
03	Don't know

ASK IF Q17A_03=1
Q17B_3. You mentioned that your business changed its gas company in the last 5 years. Was that in the last 12 months?

CODE	
01	Yes
02	No
03	Don't know

ASK IF Q17A_04=1
Q17B_4. You mentioned that your business changed its gas plan from the same company in the last 5 years. Was that in the last 12 months?

CODE	
01	Yes
02	No
03	Don't know

ASK IF Q17A 01>1
Q17C_1. And of those [INSERT from Q17A_01] times your business changed its electricity company in the last 5 years, how many were in the past 12 months?

PROGRAMMING INSTRUCTION: ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99

CODE	
01	[NUMERIC TEXT]
02	Don't know

ASK IF Q17A 02>1
Q17C_2. And of those [INSERT from Q17A_02] times your business changed its electricity plan from the same company in the last 5 years, how many were in the past 12 months?

PROGRAMMING INSTRUCTION: ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99

CODE	
01	[NUMERIC TEXT]
02	Don't know

ASK IF Q17A 03>1
Q17C_3. And of those [INSERT from Q17A_03] times your business changed its gas company in the last 5 years, how many were in the past 12 months?

PROGRAMMING INSTRUCTION: ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99

CODE	
01	[NUMERIC TEXT]
02	Don't know

ASK IF Q17A 04>1
Q17C_4. And of those [INSERT from Q17A_04] times your business changed its gas plan from the same company in the last 5 years, how many were in the past 12 months?

PROGRAMMING INSTRUCTION: ALLOW NUMERIC RESPONSE BETWEEN 0 AND 99

CODE	
01	[NUMERIC TEXT]
02	Don't know

ASK ALL IN S/E QLD, VIC, NSW, SA, ACT, BUT NOT TAS OR REST OF QLD (GO TO Q34)
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas? **(SR)**

CODE	
01	Yes
02	No
03	Cannot recall

ASK IF Q18=1
Q18B. In what ways was your business approached by an energy company? Please select all that apply. **(MR)**

CODE	
01	Someone came to my premises
02	Received a call
03	Letter in the mail
04	Brochures / flyers in the mail
05	Email
06	Other (please specify)

07	Don't know

ASK ALL IN S/E QLD, VIC, NSW, SA, ACT, BUT NOT TAS OR REST OF QLD (GO TO Q34) Q18C. Generally speaking, to what extent do you agree or disagree with each of the following statements in relation to marketing and information from energy retailers?

Please select one answer per row. **(SR per item)**

PROGRAMMING INSTRUCTION: RANDOMISE ORDER

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
a. Energy retailers are overly aggressive in their marketing practices.	01	02	03	04	05	06
b. Energy retailers do not market themselves or their offers strongly enough.	01	02	03	04	05	06

ASK ALL IN S/E QLD, VIC, NSW, SA, ACT, BUT NOT TAS OR REST OF QLD (GO TO Q34) Q20. In the past 12 months, have <u>you actively</u> investigated different energy offers or options that you could potentially switch to? **(SR)**

CODE	
01	Yes
02	No
03	Don't know

Switching Electricity

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0). IF NOT SWITCHED, SKIP to Q32

Q22. The last time you switched, what was the main reason you changed your business's energy company, plan or deal? (Open Ended)

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q49. Below is a list of potential factors in a decision to switch energy companies. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all important and 10 means extremely important.

Please select one answer per row.

PROGRAMMING INSTRUCTIONS: RANDOMISE ITEMS. KEEP ORIGINAL ITEM CODES

		Importance rating	Don't know	Not applicable
B	The estimated total bill amount	0-10	11	12
D	Whether you are locked into a contract	0-10	11	12
E	The discounts offered	0-10	11	12
G	Availability of green / renewable energy plans	0-10	11	12
H	The solar feed-in tariff offered by the company	0-10	11	12
I	Whether the price can change during the contract	0-10	11	12
N	The brand and reputation of the company	0-10	11	12
O	The ability to purchase or access technologies such as solar panels, energy storage batteries, live energy use data or energy management systems	0-10	11	12
P	The company offered an upgraded meter	0-10	11	12
Q	The customer service on offer	0-10	11	12
R	Bonus rewards such as gym memberships, frequent flyer points or shopping vouchers	0-10	11	12

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q50. And having switched your business's energy company, plan or deal, to what extent do you agree or disagree with the following statements? For each one, indicate if you agree or disagree strongly or just somewhat. Please just think about the last time you switched. **(SR PER ITEM)**

Please select one answer per row.

PROGRAMMING INSTRUCTIONS: RANDOMISE ITEMS

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
c. The last time I switched I was happy with the decision	01	02	03	04	05	06
f. I was satisfied with the process involved in switching	01	02	03	04	05	06
g. I was confident in the decision to switch as there was sufficient and transparent information available regarding energy offers	01	02	03	04	05	06

ASK IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0)

Q51. The last time you switched your business's energy company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch? **(SR)**

CODE	
01	Very easy
02	Fairly easy
03	Neither easy nor difficult

04	Fairly difficult
05	Very difficult
06	Don't know / can't recall

IF SWITCHED ELECTRICITY OR GAS COMPANY OR PLAN IN LAST 5 YEARS (Q17A CODE 1 > 0 or Q17A CODE 2 > 0 or Q17A CODE 3 > 0 or Q17A CODE 4 > 0), USE THE FOLLOWING QUESTION TEXT FOR Q23:

Q23. The last time you changed your energy company, plan or deal, which information sources did you use to help with your decision? Please select all that apply. (Open Ended)

IF NOT SWITCHED BUT INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20 =1), USE THE FOLLOWING QUESTION TEXT FOR Q23:

Q23. You mentioned you previously investigated different offers or options that you could potentially switch to. What information sources did you use in your last investigation? (Open Ended)

Did not switch

IF NOT SWITCHED BUT INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20 =1), USE THE FOLLOWING QUESTION TEXT FOR Q32:

Q32. You mentioned investigating different offers and options. What made you decide not to go on and change your business's energy company or plan in the last 12 months? (Open Ended)

IF NOT SWITCHED OR INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20=2 OR 3), USE THE FOLLOWING QUESTION TEXT FOR Q32:

Q32. Are there any reasons you haven't investigated different options or changed your business's energy company or plan in the last 12 months? (Open Ended)

Future Intentions

ASK ALL
Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business? **(SR)**

CODE	
01	We are currently looking for a better deal
02	We would be interested in switching to a better deal but are not currently looking
06	We recently switched our business energy provider or plan and so probably won't look for a better deal for a while
03	We are not interested in switching our energy provider or plan
07	We have no other options available here / only one provider
04	Other (please specify)
05	None of the above

ASK ALL
Q36. How confident are you that you could find the right information to help you choose an energy plan that suits your business's needs, on a scale of 0-10 where 0 means not at all confident and 10 means extremely confident? **(SR)**

Not at all confident									Extremely confident	Don't know
0	1	2	3	4	5	6	7	8	9	10	11

ASK IF NOT SWITCHED OR INVESTIGATED OPTIONS IN THE LAST 12 MONTHS (Q17A ALL CODES 1-4=0 AND Q20=2 OR 3)
Q37. If you wanted to look for information about different energy retailers or plans for your business, what would be your **most** preferred method or source of information? **(Open Ended)**

ASK ALL
Q59. Do you agree or disagree with each of the following statements regarding switching energy companies?

Please select one answer per row. **(SR PER ITEM)**

PROGRAMMING INSTRUCTION: RANDOMISE ITEMS

	Agree strongly	Agree somewhat	Neither agree/ disagree	Disagree somewhat	Disagree strongly	Don't know
a. I generally don't trust energy companies that promise a better deal	01	02	03	04	05	06
b. I'm concerned that if I switch energy company or plan there might be hidden fees and charges	01	02	03	04	05	06
c. I would switch my energy company if I was not satisfied with my current company	01	02	03	04	05	06
d. I would prefer to try and save energy to reduce my bill than to seek out a better deal	01	02	03	04	05	06
e. The amount of money I could save is not worth the time and effort involved in switching	01	02	03	04	05	06
f. It is too complicated to try and compare the various options and offers available	01	02	03	04	05	06
h. I don't have the time or energy to think about switching	01	02	03	04	05	06
i. I require help in assessing the best	01	02	03	04	05	06

energy deal for my business						

Comparison Websites

ASK ALL
Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their business?

Please note all the comparison websites or services that you are aware of (Open ended)

IF NSW / QLD / ACT / SA / TAS:

•

Q39. Have you heard of the independent government comparator website called **IF NSW / QLD / ACT / SA/ TAS:** energymadeeasy? **(SR)**

CODE	
01	Yes
02	No
03	Don't know

IF VIC:

Q40. Have you heard of the independent government comparator websites Victorian Energy Compare or My Power Planner…?

ALLOW MULTIPLE RESPONSE FOR CODES 1 AND 2 ONLY

CODE	
01	Yes, Victorian Energy Compare
02	Yes, My Power Planner
03	No, neither of these
04	Don't know

IF NSW:

Q63. Have you heard of the websites yourenergy.nsw.gov.au or the campaign Power in Your Hands …?

ALLOW MULTIPLE RESPONSE FOR CODES 1 AND 2 ONLY

CODE	
01	Yes, Power in your hands campaign
02	Yes, yourenergy.nsw.gov.au
03	No, neither of these
04	Don't know

IF QLD:

Q82. Have you heard of the Queensland Government campaign called EnergySave?

CODE	
01	Yes
02	No
03	Don't know

Demographics

Below are some questions about you and your business. These are for demographic analysis purposes only.

ASK ALL
D1. Does your business own its premises or are you leasing the premises? **(SR)**

CODE	
01	Own
02	Leasing
03	Other (please specify)

D5e. For each of the following items, please indicate whether your business has them, and if not, how likely you think it is that you will have them within the next two years.

Please select one answer per row. **(SR FOR EACH)**

	Already have	Definitely will	Probably will	Might	Probably won't	Definitely won't
a. Solar panels	01	02	03	04	05	06
b. Solar hot water system	01	02	03	04	05	06
c. Batteries for storing electricity	01	02	03	04	05	06

d. An electric vehicle	01	02	03	04	05	06
e. A digital interval meter, also known as a 'smart meter'	01	02	03	04	05	06
f. Energy management system which automatically controls your heating or cooling thermostat and appliances according to your settings	01	02	03	04	05	06
g. An app that allows you to remotely control / adjust your appliances via your mobile phone	01	02	03	04	05	06

ASK FOR ANY ITEM WHERE CODE 1 WAS SELECTED AT D5E
D5f. For each of the following items that you indicated your business has, which of the following best describes your ownership arrangement of that item? **(SR FOR EACH)**

	Own it outright	Own it with a loan purchase	Lease it	Other (please specify)	Don't know
a) Solar panels	01	02	03	04	05
b) Solar hot water system	01	02	03	04	05
c) Batteries for storing electricity	01	02	03	04	05
d) Electric vehicle/s	01	02	03	04	05
e) Digital interval meter, also known as a 'smart meter'	01	02	03	04	05
f) Energy management system (automatically controls your heating or cooling thermostat and appliances according to your settings)	01	02	03	04	05

ASK ALL
D29. In the last 12 months has your business experienced any financial difficulty in paying energy bills? **(SR)**

CODE	
01	Yes – in the last 12 months
02	Have in the past, more than 12 months ago
03	No / Never
04	Don't know

ASK ALL
D30. On average, what is your business's annual turnover in dollar terms?

Note: Your annual turnover is the total ordinary income you derive in the income year in the ordinary course of carrying on a business. It does not include the costs that the business incurs throughout the year. **(SR)**

CODE	
01	$0 to less than $200K
02	$200K to less than $500K
03	$500K to less than $2M
04	$2M to less than $5M
05	$5M to less than $10M
06	$10M or more

ASK ALL
D31. Do you speak a language other than English at home? **(SR)**

CODE	
01	Yes
02	No

ASK IF D31=1
D32. What language/s do you speak other than English at home?

[FREE TEXT]

ASK IF D31=1
D33. Have you ever experienced any language barriers that have negatively impacted on your ability to… **(SR for each)**

	Yes	No	Unsure
a. Understand your energy bill	01	02	03

b. Consider an alternative energy company, plan or contract	01	02	03
c. Consider investing in energy management or generation technology	01	02	03

Closing

Thank you for your participation in the survey. As mentioned earlier, this study is being conducted on behalf of the Australian Energy Market Commission and the results will be used to assess the effectiveness of retail competition in your state **[or territory - IF ACT]**.

Your responses in this survey will be kept completely confidential and will be used only for market research purposes. As a market research company, we comply with the requirements of the Privacy Act. By law, your responses will in no way be linked with your customer account details. Thank you again for your time.