Australian Energy Market Commission.

2019 Retail Competition Review – Small Business.

Final report

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colmar brunton.

Contents.

Executive summary

Executive Summary

Overall satisfaction, customer service & value for money

Electricity	• The 2019 findings saw no significant change in overall satisfaction with electricity providers (2019 was 3.6 whereas the range during 2014 – 2018 was 3.5 to 3.9). • Businesses in 2019 were significantly more likely to indicate they are somewhat satisfied with their electricity company (38%, compared to 25% in 2018). • Demographics that recorded a significantly higher satisfaction included businesses with 20-199 employees, and those in the Transport, Postal and Warehousing industries. • ROQ businesses recorded a significantly lower mean satisfaction.
Gas	• The average level of satisfaction with their current gas provider in 2019 was 3.7; this represents the lowest average score since the study commenced in 2014. • Concerningly, businesses in 2019 were significantly more likely to indicate they are very dissatisfied with their current gas provider (14%, compared to 1% in 2018).
Electricity	• Average satisfaction with the value of money of electricity providers was 5.6 in 2019. This result continues a downward trend of average satisfaction since a high of 6.6 in 2016. • Demographics that recorded significantly higher satisfaction ratings included: businesses with 20-199 employees, metro businesses, SEQ businesses, rental, hiring and real estate services industry. Conversely significantly lower mean satisfaction ratings were evident in regional businesses, ROQ businesses and the Construction industry.
Gas	• Satisfaction with the value for money of gas providers also decreased from 6.6 in 2018 to 5.9 in 2019. • Businesses in 2019 were significantly less likely to answer ‘don’t know’ (2%, compared to 11% in 2018).

Executive Summary

Perceptions of choice in the market, satisfaction with choice, confidence in finding the right information to make a choice

Electricity

- Most businesses in 2019 were aware that they could choose their electricity company (88%), however a downward pattern is evident over time (94% in 2017, 91% in 2018 and 88% in 2019).
- Of note, 22% of businesses in 2019 did not know if their business could choose from a range of different electricity plans (either answering 'false' (13%) or 'don't know' (9%).
- The remaining 78% were aware of their ability to choose different electricity plans; this is the lowest figure for this response since the study commenced in 2014.

Gas

- Overall, knowledge of choice of gas companies and plans remained strong in 2019 albeit slight falls from 2018 results. Knowledge of choice of gas companies was 92% in 2019 (down from 95% in 2018), and knowledge of choice in different gas plans was 83% in 2019 (down from 87% in 2018).
- Businesses that were significantly less likely to think they have a choice of gas company included: TAS/ACT businesses, Retail Trade industry

- Average satisfaction with choice of energy companies increased slightly from 3.4 in 2018, to 3.5 in 2019.
- Of note, there remains around one in ten (11%) businesses in 2019 who are very dissatisfied with the level of choice in energy companies and plans which are available to them.
- Demographics that recorded a significantly lower mean satisfaction included: regional businesses, ROQ/TAS businesses, Retail Trade industry.

- Confidence in finding the right information to help choose a suitable energy plan has continued to decrease from a high of 7.1 in 2017, to 6.5 in 2018, and finally to 6.1 in 2019.
- This decrease can be linked to a significant decrease in the proportion of businesses who answered 'quite or very confident' (42%, compared to 62% in 2018), and a significant increase for those who answered 'fairly confident' (27%, compared to 17% in 2018).
- Demographics that recorded a significantly higher confidence ratings included: businesses with 20-199 employees, metro businesses, VIC businesses.
- Demographics that recorded a significantly lower mean confidence rating included: regional businesses and ROQ businesses.

Executive Summary

Investigating alternate offers in the energy market

	• Just over a third of businesses (35%) in 2019 reported actively investigating different energy offers or options; this result is consistent with previous years.
	• Google/internet searching' remains the most common information sources to investigate switching options among business operators who had switched in the last 12 months (26% in 2019). • Of note, businesses in 2019 were significantly less likely to answer 'retailer website' (10%, compared to 22% in 2018), and 'looked at price / best price / saving' (2%, compared to 22% in 2018); and were significantly more likely to answer 'brochures / flyers and other direct mail' (2%, compared to 0% in 2018). • A number of significant differences were observed across demographics, including: ○ Businesses with 20-199 employees were more likely to use an energy broker/advisor and look at the best price or saving, those with 1-4 employees more likely to use general advertising. ○ NSW businesses more likely to rely on family/friend/colleague for information ○ Financial and Insurance Services industry more likely to use retailer website and brochures, Rental, Hiring and Real Estate Services industry more likely to use energy broker/advisor, Professional, Scientific and Technical Services more likely to use real estate moving service, Transport, Postal and Warehousing more likely to use a family/friend/colleague.
	• Unprompted awareness of any comparison website was significantly higher in 2019 (34%, compared to 22% in 2018); • iSelect (14%) and Compare The Market (12%) continue to be the standout comparison websites which are recalled. • Specific comparison websites that respondents in 2019 were significantly more likely to recall included goswitch (2%, compared to 0% in 2018), and Energy watch (2%, compared to 0% in 2018). • After recalling comparison websites by top of mind, businesses were then asked follow up questions if they had heard of various government comparison websites. Total awareness of Victorian Energy Compare increased significantly from 3% in 2018 to 16% in 2019. Further, over half of VIC businesses (55%) are aware of Victorian Energy Compare, increasing significantly from 13% in 2018.
	• Almost two-thirds (64%) of businesses in 2019 reported being approached by an alternate energy company in the past 12 months; this was significantly lower than the 79% observed in 2018. • Receiving a call continues to be the dominant method of approach (80%), followed by someone coming to their premises (23%) and email (10%). • Demographics that were significantly more likely to be approached included metro businesses and VIC/SA businesses.

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Switching attitudes, intentions and behaviours

- Just over half of all businesses indicated a propensity to switch (51%), down from 54% in 2018 but generally consistent with previous years that range from 46% to 59%.
- Businesses this year were significantly more likely to indicate they are currently looking for a better deal (12%, compared to 5% in 2018).
- The total propensity to switch was significantly higher among NSW businesses and the Construction industry.
- Metro businesses were significantly more likely to indicate they are not interested in switching their energy provider or plan, whereas regional businesses were significantly more likely to indicate they have no other options available.

- As in previous waves of the study, business operators were asked a range of questions to explore their attitudes towards switching. Compared to 2018, there was a significant decrease in the average agreement with the statement 'I would switch my energy company if I was not satisfied with my current company' (4.3 in 2019, compared to 4.6 in 2018).
- Furthermore, the four statements which recorded the highest mean agreements all saw significant decreases for the response 'strongly agree', this includes:
  - 'I would switch my energy company if I was not satisfied with my current company' (50% strongly agree in 2019, compared to 71% in 2018).
  - 'I generally don't trust energy companies that promise a better deal' (25% strongly agree in 2019, compared to 38% in 2018).
  - 'I'm concerned that if I switch energy company or plan there might be hidden fees and charges' (24% strongly agree in 2019, compared to 36% in 2018).
  - 'I would prefer to try and save energy to reduce my bill than to seek out a better deal.' (20% strongly agree in 2019, compared to 37% in 2018).

- Switching either a provider or plan in the past 5 years has decreased from 70% in 2018 to 63% in 2019, however this is still well above 2014-2017 results which range from 44% to 53%.
- ACT businesses and those in the Health Care and Social Assistance industry were significantly less likely to switch 'any' electricity (company and/or plan) in the last 5 years.
- Compared to 2018 results, switching rates (electricity or gas company/plan) for businesses in 2019 increased for those in ACT and SA, but decreased for those in VIC, NSW and SEQ.
- Gas business data for 2018 has not been included for comparison due to small sample sizes.

- The main reason for switching continued to be motivated by price (either wanting a better price or being offered a better price), with 78% of those who switched in 2019 providing this response.
- Businesses that switched company or plan in 2019 were significantly more likely to cite 'moved business premises' as a reason for their switch (7%, compared to 2% in 2018).

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Past reasons for switching, reasons for not taking action, switching outcomes

- Those that had switched provider or plan in the past were asked to rate the importance of a number of factors in terms of why they switched. In general, factors that were rated as the most important in 2018 continued to be the same in 2019.
- Although ‘the estimated total bill amount’ and ‘the discounts offered’ continued to be the two most important factors, the proportion of respondents who answered ‘not important’ to these factors increased significantly from 2018, specifically:
  - 8% consider ‘the estimated total bill amount’ as not important (up from 0% in 2018); and
  - 11% consider ‘the discounts offered’ as not important (up from 4% in 2018.

- Reasons for not switching in the past 5 years or investigated options in the past 12 months cited ‘too busy / too much hassle / couldn’t be bothered’ as a reason for not taking any action (33%, a significant increase from 11% in 2018).
- Other common reasons for not taking action included ‘they are all the same / no significant price differentiation’ (15%), ‘happy with current retailer / arrangement / plan’ (13%), and ‘too confusing’ (10%); each of these reasons were significantly more likely to be provided in 2019 compared to 2018 results.

- Overall, those that reported switching provider or plan within the past 5 years continue to be satisfied with the outcome.
- Of some concern, the 2019 results show a shift from answering ‘agree strongly’ to only ‘agreeing somewhat’ with two of the positively framed statements about switching outcomes. More specifically, the following significant differences were observed:
  - Businesses in 2019 were more likely to answer ‘agree somewhat’ to ‘the last time I switched I was happy with the decision’ (38%, compared to 21% in 2018).
  - Businesses in 2019 were less likely to answer ‘agree strongly’ to ‘I was satisfied with the process involved in switching (38%, compared to 55% in 2018), and more likely to answer ‘agree somewhat’ (46%, compared to 27% in 2018).
- No significant differences were observed by mean agreement across demographics.

- The average level of ease of comparing alternate offers when deciding whether or not to switch dropped to a new low of 3.3 in 2019 (compared to means ranging from 3.5 to 3.7 between 2015 to 2018).
- Businesses in 2019 were significantly more likely to answer ‘neither easy nor difficult’ (14%, compared to 6% in 2018).

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Top 3 NEM energy retailers, rewards and discounts received, active choice in contract, expiration of electricity contract

Electricity	• The three major energy retailers (Origin Energy, AGL Energy and Energy Australia) continue to be the most commonly used. • Origin Energy and AGL Energy both recorded having a smaller market share among businesses surveyed in 2019 compared to the 2018 sample. • Compared to 2018, respondents in 2019 were significantly more likely to mention Ergon Energy (6%, compared to 0% in 2018), Aurora Energy (2%, compared to 0% in 2018); and were significantly less likely to mention ActewAGL (1%, compared to 3% in 2018). • Demographics that were significantly more likely to use an energy retailer outside of the major three included: regional businesses and businesses in the Retail Trade industry.
Gas	• AGL Energy continues to be the dominant energy retailer for gas usage (39% in 2019), followed by Energy Australia (16%) and Origin Energy (16%).
	• In 2019, 59% of businesses reported that their electricity provider offers rewards or discounts, consistent with the 60% figure observed in 2018. • Businesses in 2019 were significantly less likely to report that their gas provider offers rewards or discounts (58%, compared to 80% in 2018).
	• Active choice in current contracts was found in two-thirds (66%) of businesses in 2019. • 70% of those with gas had actively chosen their gas contract or plan. • Demographics that were significantly more likely to actively choose their particular contract or plan included: metro businesses, NSW/VIC/SA businesses, Rental, Hiring and Real Estate Services industry. • Demographics that were significantly less likely to actively choose their particular contract or plan included regional businesses and ROQ/TAS businesses.
	• 40% of businesses in 2019 reported that their electricity contract does not have an expiry date, significantly higher than the 18% observed for this response in 2018. ○ There remains a high proportion (31%) who do not know when their electricity contract expires.

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Bill shock, perceived reasons for increases, financial difficulties, savings required to entice switching

- A higher proportion (44%) of businesses in 2019 experienced bill shock, compared to 36% in 2018 and 38% in 2017.
  - Across demographics, businesses with 20-199 were significantly less likely to experience bill shock, whereas those in the Construction industry were significantly more likely.
- When asked to specify how much higher this dollar amount was from their normal bills, the average amount was $570; this continues an upward pattern beginning from an average of $320 in 2017, and an average of $491 in 2018.

- Respondents in 2019 were significantly less likely to indicate ‘a market increase in the retail cost of energy’ as a reason for their bill increase (40%), compared to those in 2018 (60%).
- In terms of actions taken in response to the surprising bill increase, respondents in 2019 were significantly less likely to have ‘made efforts to reduce energy consumption’ (30%) compared to those in 2018 (51%).
- Businesses in the Rental, Hiring and Real Estate Services industry were significantly more likely to switch retailers as a result of the bill increase.
- Businesses with solar panels were significantly more likely to respond to a bill increase by investing in renewables or an alternative energy supply.

- The majority of businesses have not experienced financial difficulty in paying energy bills over the past 12 months (88% in 2019).
- Nonetheless, around one in ten businesses in 2019 did report experiencing financial difficulty (11%), representing a slight increase from 7% in 2018.
- Demographics that were significantly more likely to experience financial difficulty in the last 12 months included: regional businesses (metro businesses were significantly less likely) and ROQ businesses.

- The average quarterly amount of savings which would be needed to consider switching decreased for electricity and increased for gas in 2019:
  - for electricity, $228 in savings per quarter would be required (down from $246 per quarter in 2018); and
  - for gas, $105 in savings per quarter would be required (up from $54 per quarter in 2018).

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New technologies such as solar, batteries, electric cars, smart meters, energy management systems and apps

- One-third (33%) of businesses in 2019 already have solar panels, with this figure significantly higher than the 18% observed in 2018. Among those businesses that already have solar panels, the majority (88%) own it outright.
- There was also a significant decrease in the proportion who answered they definitely won't take up solar panels (30%, compared to 51% in 2018).
- Almost half (47%) of businesses in 2019 indicated that they definitely won't take up solar hot water systems. Although this is a sizeable proportion, it also represents a significant decrease from 62% who provided this response in 2018.

- There is greater openness to using batteries for storing electricity, with the proportion of businesses who indicated they definitely won't use this equipment decreasing significantly from 56% in 2018 to 39% in 2019.

- Over half (58%) of businesses in 2019 remain closed to using electric vehicles by answering 'definitely won't'.
- Although just 3% of businesses in 2019 definitely will use electric vehicles, this was significantly higher than the 1% who provided this response in 2018.

- One in four (25%) businesses in 2019 indicated they definitely won't use smart meters, representing a slight decrease from 32% in 2018.
- There was a significant decrease in the proportion of businesses who answered they might use smart meters (9% in 2019, compared to 18% in 2018).
- Just under half (47%) of businesses in 2019 indicated they definitely won't use energy management systems, and a further 29% probably won't.
- Businesses with 20-199 employees, and businesses with solar panels, were significantly more likely to indicate they already have an energy management system.

- Three-quarters of businesses in 2019 are closed to the idea of apps to remotely control appliances, with 51% indicating they definitely won't and a further 24% indicating they probably won't.
- Nonetheless, businesses in 2019 were significantly more likely to answer that they definitely will use apps to remotely control appliances (4%, compared to 1% in 2018).

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Conclusions

	Overall satisfaction with electricity providers remains relatively consistent compared with the past 5 years however there is a significant drop in satisfaction with gas providers. Perceived value for money is declining for both gas and electricity. The propensity to switch remains at similar levels to 2018 (51% 2019 down slightly from 54% in 2018) however there is an increased intention to seek a better deal (12% 2019 – 5% 2018) which is the desired outcome of any healthy and competitive market. Businesses are finding it more difficult to compare offers in the market. There is a need for greater awareness and utilisation of tools such as sites and services available to assess offers. This fact reinforces that simplicity and transparency relating to offers will be paramount. iSelect (14%) and Compare The Market (12%) continue to be the standout comparison websites. Total awareness of government agency websites for comparison have significantly increased in Victoria. Victorian Energy Compare increased significantly from 3% in 2018 to 16% in 2019. Further, over half of VIC businesses (55%) are aware of Victorian Energy Compare, increasing significantly from 13% in 2018. The results suggest that businesses have lower levels of confidence in finding the right information and weighing up the factors to choose a new provider. • NSW businesses are most likely to switch providers, specifically those in the construction industry. • The average quarterly amount of savings which would be needed to consider switching decreased for electricity and increased for gas in 2019: ○ for electricity, $228 in savings per quarter would be required (down from $246 per quarter in 2018); and ○ for gas, $105 in savings per quarter would be required (up from $54 per quarter in 2018).
	The most important factors influencing switching behaviour are the estimated total bill amount and discounts offered. Attitude's towards the price changing within the contract period and preference to being locked into a contract appear to be shifting over time. It was more important in the past to have a dependable price over the course of the contract and a locked in contract. Now there appears to be more ambivalence in the market towards these issues. The top 3 NEM energy retailers remain unchanged in dominance of position since 2018.

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 2019 review is the sixth of its kind. While previous consumer research has spanned both residential and small business customers, the 2018 and 2019 editions of this study have focused on small business customers only.

Methodology

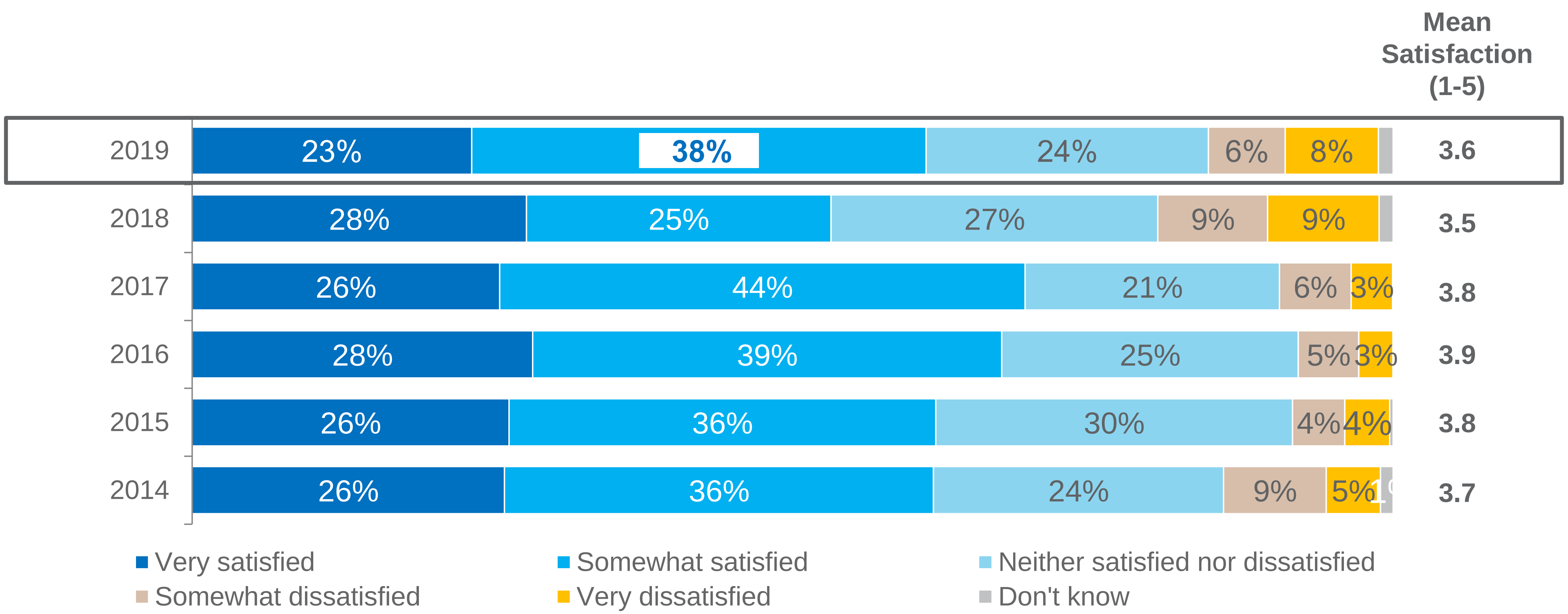
- A CATI (computer assisted telephone interviewing) survey was undertaken from 25 March-29 April, achieving n=800 completes from business operators.
- Data has been weighted using the latest available ABS business counts data by location and business size (8165.0 – Counts of Australian Businesses, including Entries and Exits, June 2014 to June 2018). Note that due to the unavailability of 2019 business counts data, the June 2018 business counts was used to weight the 2019 data in this report. Minimum quotas by industry type were also set to ensure the data was representative of the broader small business population.
- 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 2018 has been coloured blue. Conversely, a statistically significant lower result compared to 2018 has been coloured red.
- Significant differences have also been analysed across the following demographics: business size (i.e. number of employees), location, industry type, and whether they currently have solar panels. Note that this demographic analysis has been conducted using the unweighted survey results (this allows for a better comparison on these factors as per the original disproportionate stratified sampling approach).
- An exception reporting approach has been undertaken in that if no statistical significance was mentioned, there was none associated with these groups.

Chapter 1A – Time series comparisons

Satisfaction with current energy providers

Overall satisfaction with current electricity provider

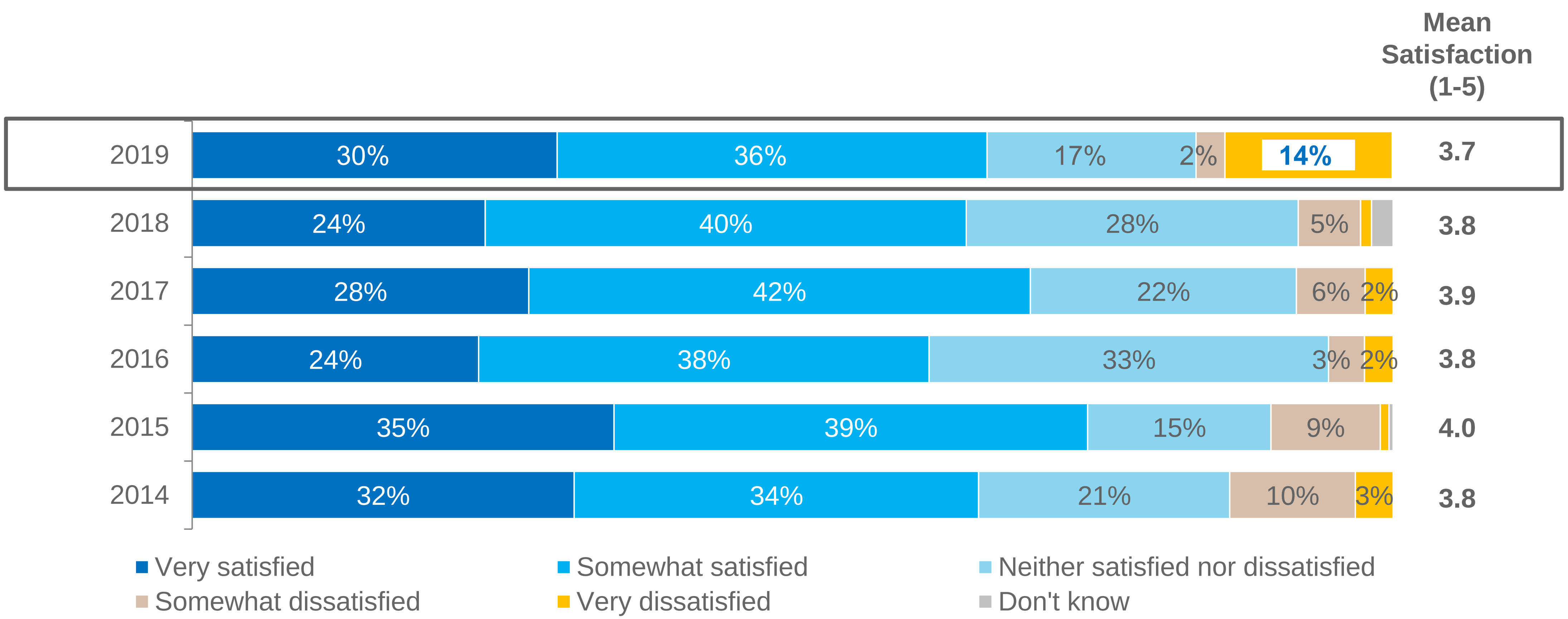
- The average level of satisfaction with electricity providers in 2019 was 3.6; this is generally consistent with past results which have ranged from 3.5 to 3.9 from 2014 to 2018.
- Businesses in 2019 were significantly more likely to indicate they are somewhat satisfied with their electricity company (38%, compared to 25% in 2018).
- Demographics that recorded a significantly higher mean satisfaction included businesses with 20-199 employees, and those in the Transport, Postal and Warehousing industry.
- ROQ businesses recorded a significantly lower mean satisfaction.



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); 2019 (n=800)

Overall satisfaction with current gas provider

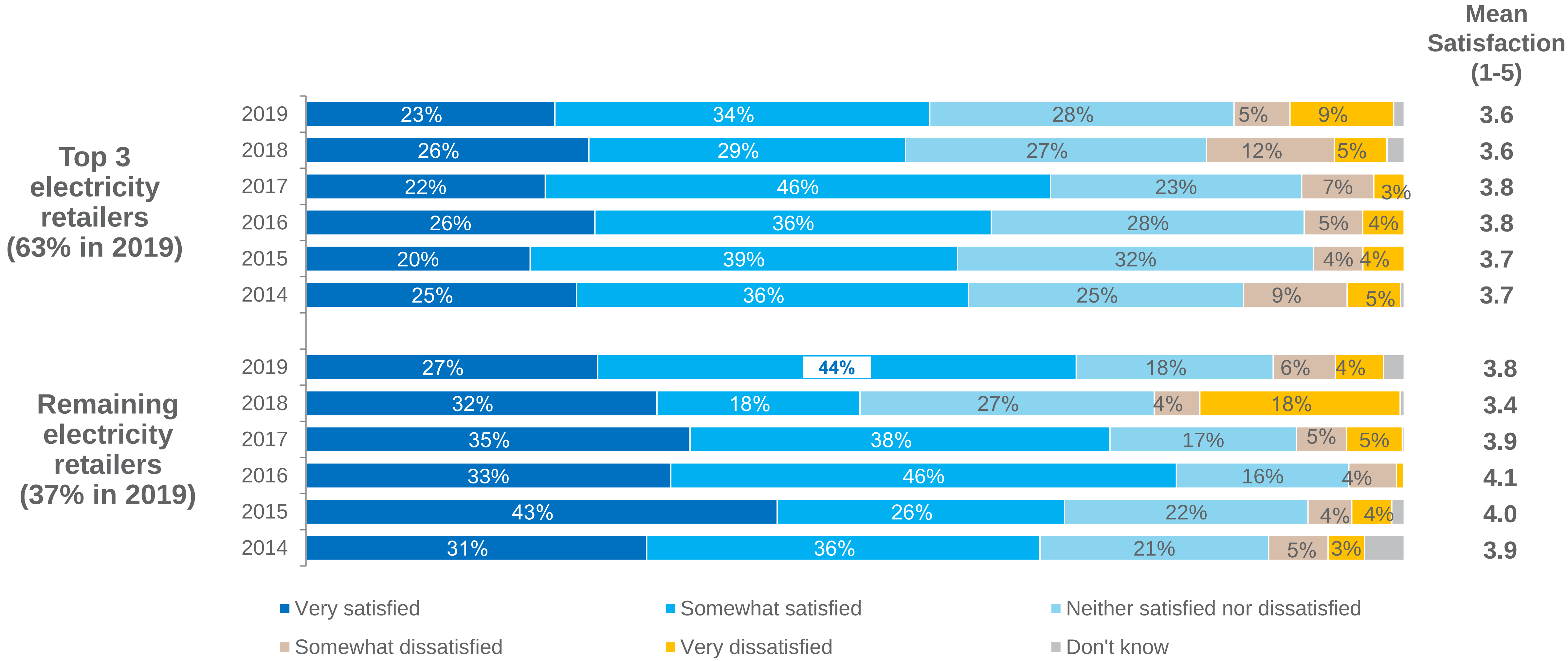
- The average level of satisfaction with their current gas provider in 2019 was 3.7; this represents the lowest average score since the study commenced in 2014.
- Concerningly, businesses in 2019 were significantly more likely to indicate they are very dissatisfied with their current gas provider (14%, compared to 1% in 2018).
- No significant differences were observed by demographics.



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); 2019 (n=163)

Overall satisfaction with top 3 electricity retailers vs smaller retailers

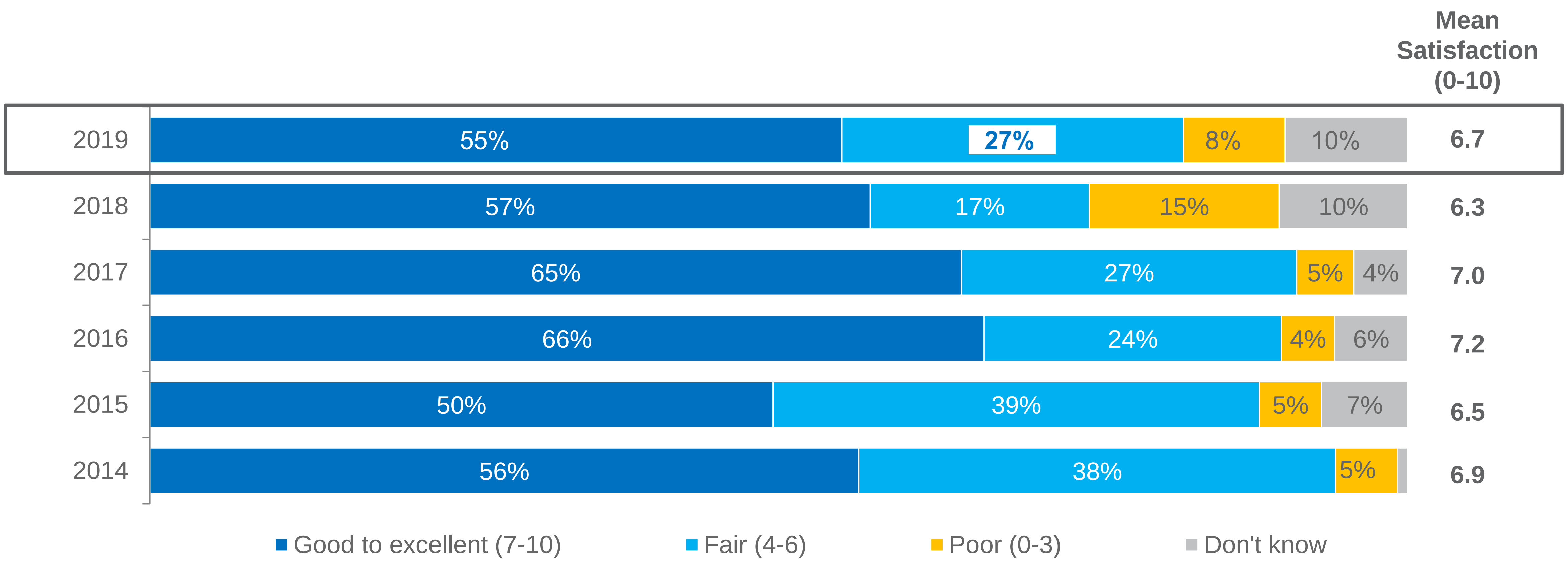
- Average satisfaction with the top 3 retailers remained very similar to 2018 results (3.6 observed in both 2018 and 2019).
- Average satisfaction with the remaining, smaller retailers increased from 3.4 in 2018 to 3.8 in 2019; this was driven by a significant increase in the proportion who were somewhat satisfied (44%, compared to 18% in 2018).
- Across demographics, mean satisfaction with the remaining electricity retailers was significantly higher for those in the Rental, Hiring and Real Estate Services industry.



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); 2019 (n=394).
Remaining electricity retailers: 2014 (n=116); 2015 (n=159); 2016 (n=161); 2017 (n=166); 2018 (n=124); 2019 (n=228).

Satisfaction with customer service among electricity providers

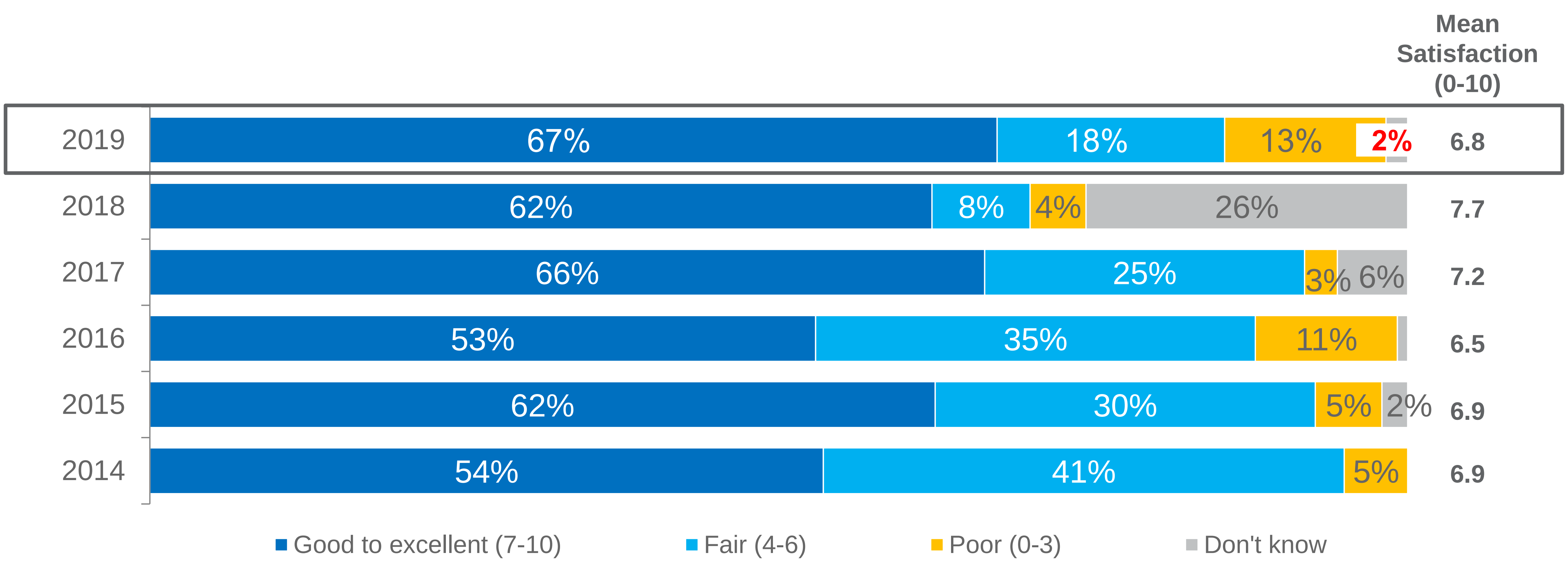
- Average satisfaction with customer service increased from 6.3 in 2018 to 6.7 in 2018.
- Of note, businesses in 2019 were significantly more likely to rate the customer service of their electricity company as ‘fair’ (27%, compared to 17% in 2018).
- Businesses in the Rental, Hiring and Real Estate Services industry recorded a significantly higher mean satisfaction.



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); 2019 (n=800)

Satisfaction with customer service among gas providers

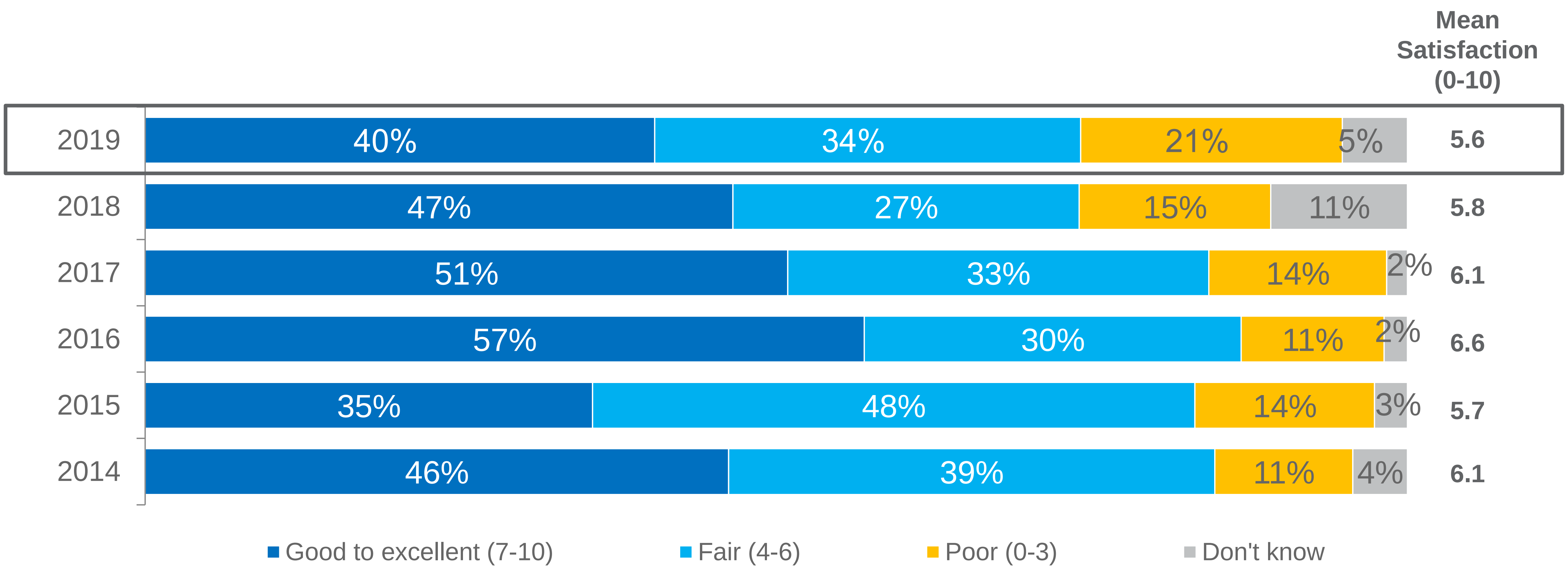
- Average satisfaction with the customer service provided by gas providers decreased was 6.8, representing a decrease from a high of 7.7 in 2018.
- There was a significant decrease in the proportion of businesses who answered ‘don’t know’ (2%, compared to 26% in 2018), however this 2019 figure is closer to 2014-2017 results.
- No significant differences were observed by demographics.



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); 2019 (n=160)

Value for money among electricity providers

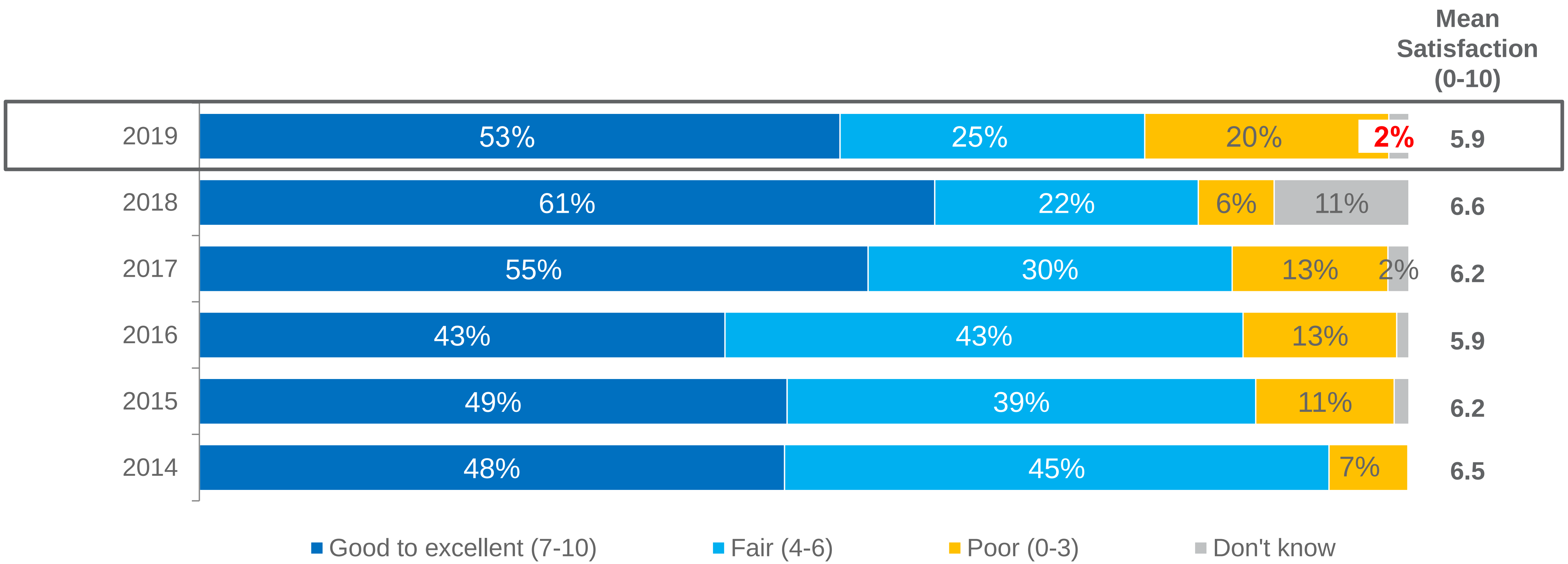
- Average satisfaction with the value of money of electricity providers was 5.6 in 2019.
- This result continues a downward trend of average satisfaction since a high of 6.6 in 2016.
- Demographics that recorded significantly high mean satisfaction ratings included: businesses with 20-199 employees, metro businesses, SEQ businesses, rental, hiring and real estate services industry.
- Demographics that recorded significantly lower mean satisfaction ratings included: regional businesses, ROQ businesses, Construction industry.



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

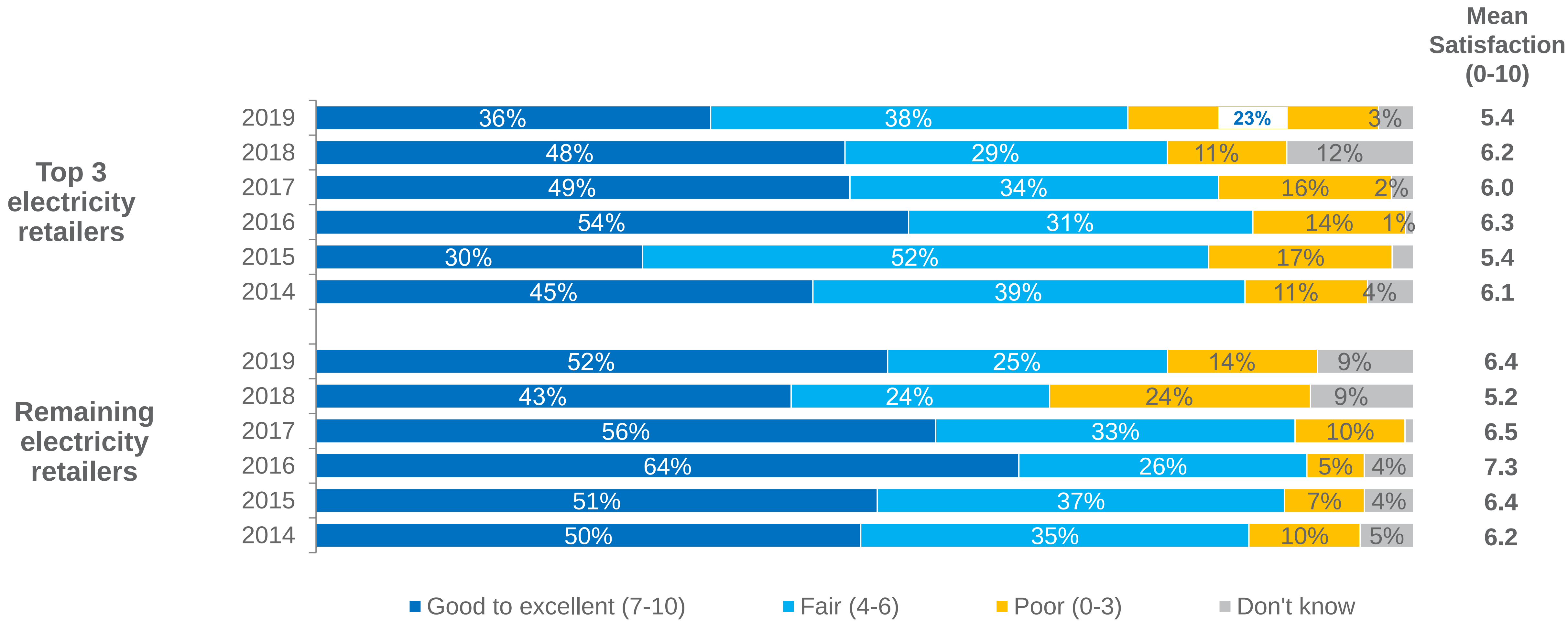
- Average satisfaction with the value for money of gas providers also decreased from 6.6 in 2018 to 5.9 in 2019.
- Businesses in 2019 were significantly less likely to answer 'don't know' (2%, compared to 11% in 2018).
- No significant differences were observed by demographics.



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); 2019 (n=160)

Value for money - top 3 electricity retailers vs smaller retailers

- Average satisfaction with the value for money of the top 3 retailers decreased from 6.2 to in 2018 to 5.4 in 2019.
- In contrast, average satisfaction with the value for money of the remaining electricity retailers increased from 5.2 in 2018 to 6.4 in 2019.
- Mean satisfaction with the remaining electricity retailers was significantly higher for Professional, Scientific and Technical Services industry and the Rental, Hiring and Real Estate services industry.



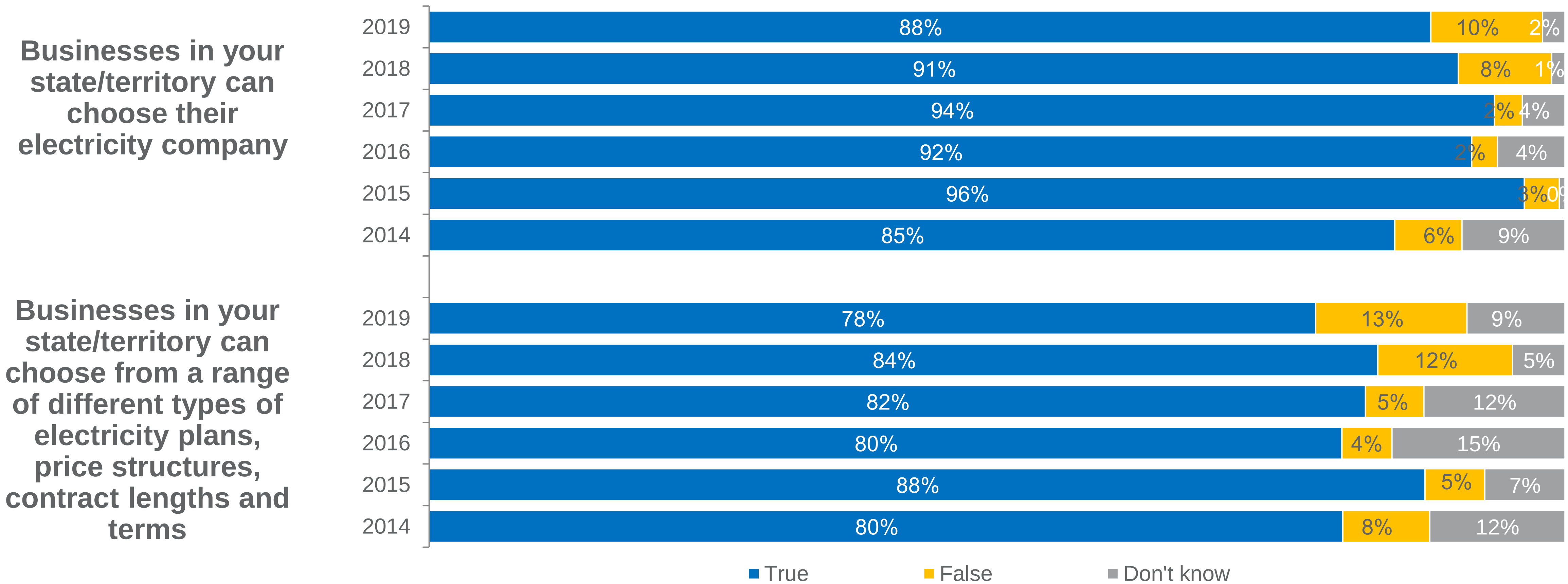
Q4. And using that same scale again, how would you rate the overall value for money of the products and services provided by your business's [electricity / energy] company?
Base: NEM participants with top 3 electricity retailers: 2014 (n=250); 2015 (n=291); 2016 (n=291); 2017 (n=284); 2018 (n=203); 2019 (n=394). NEM participants with remaining electricity retailers: 2014 (n=116); 2015 (n=159); 2016 (n=161); 2017 (n=166); 2018 (n=124); 2019 (n=228).

State of competition

Perceptions of choice

Perceptions of choice – electricity market

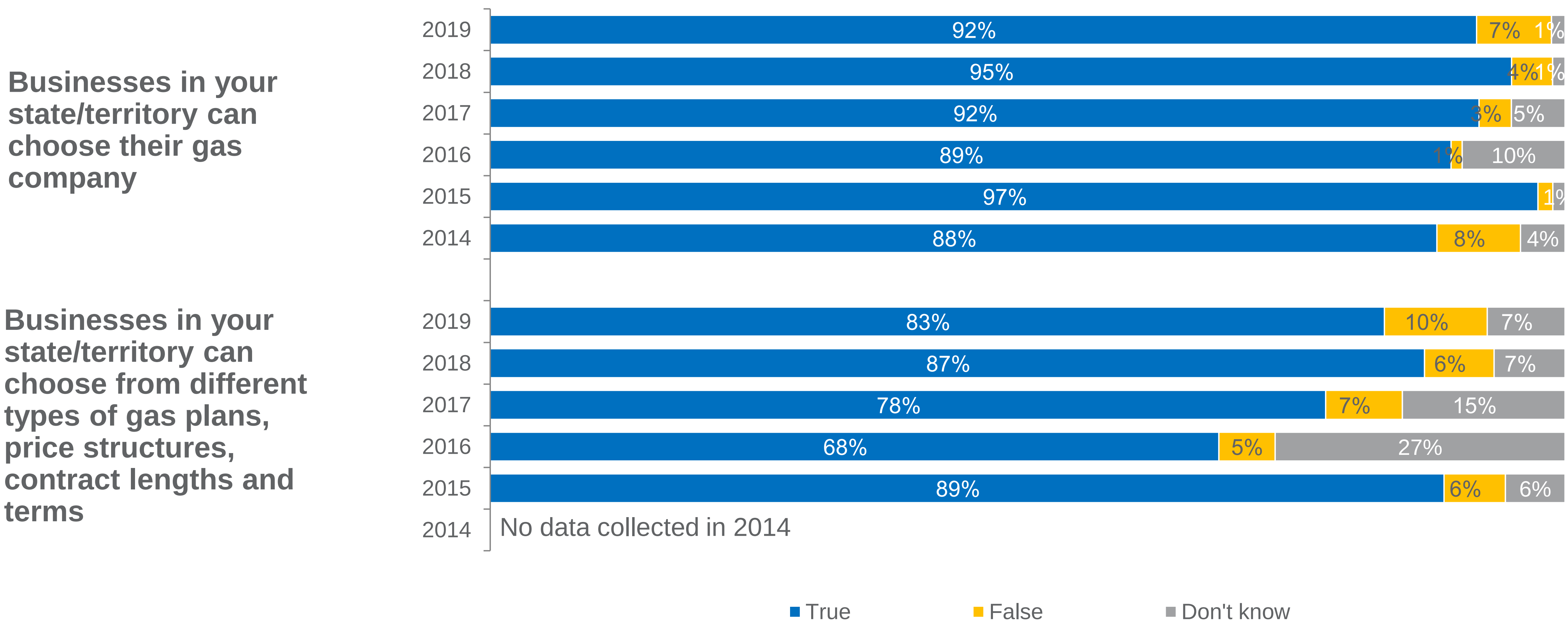
- Although most businesses in 2019 were aware that they could choose their electricity company (88%), it continues a recent downward pattern beginning from a high of 94% in 2017 to 91% in 2018.
- Of note, 22% of businesses in 2019 did not know if their business can choose from a range of different electricity plans (either answering ‘false’ (13%) or ‘don’t know’ (9%).
- The remaining 78% were aware of their ability to choose different electricity plans; this is the lowest figure for this response since the study commenced in 2014.
- Demographics that were significantly more likely to think they have a choice of electricity company included: metro businesses, NSW/VIC/SEQ/SA businesses, Construction industry, Rental, Hiring and Real Estate Services industry.
- Demographics that were significantly less likely to think they have a choice of electricity company included: regional businesses, ROQ/TAS businesses, Retail Trade industry.



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); 2019 (n=800).

Perceptions of choice – gas market

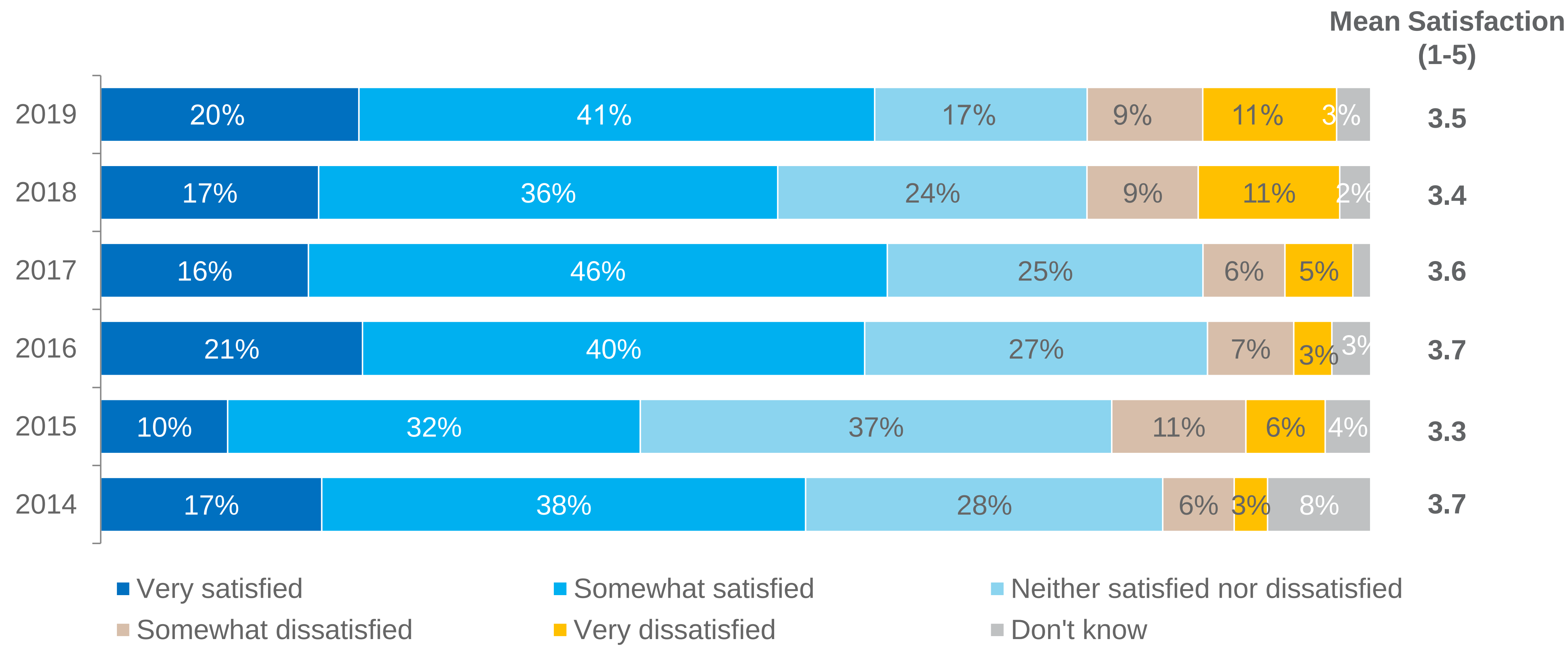
- Overall, knowledge of choice of gas companies and plans remained strong in 2019 albeit slight falls from 2018 results. Knowledge of choice of gas companies was 92% in 2019 (down from 95% in 2018), and knowledge of choice in different gas plans was 83% in 2019 (down from 87% in 2018).
- Businesses that were significantly less likely to think they have a choice of gas company included: TAS/ACT businesses, Retail Trade industry.



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); 2019 (n=165).

Satisfaction with choice of energy companies and plans

- Average satisfaction with choice of energy companies increased slightly from 3.4 in 2018, to 3.5 in 2019.
- Of note, there remains around one in ten (11%) businesses in 2019 who are very dissatisfied with the level of choice in energy companies and plans which are available to them.
- Demographics that recorded a significantly higher mean satisfaction included: metro businesses, NSW/VIC/SEQ/SA businesses, Rental, Hiring and Real Estate Services industry.
- Demographics that recorded a significantly lower mean satisfaction included: regional businesses, ROQ/TAS businesses, Retail Trade industry.

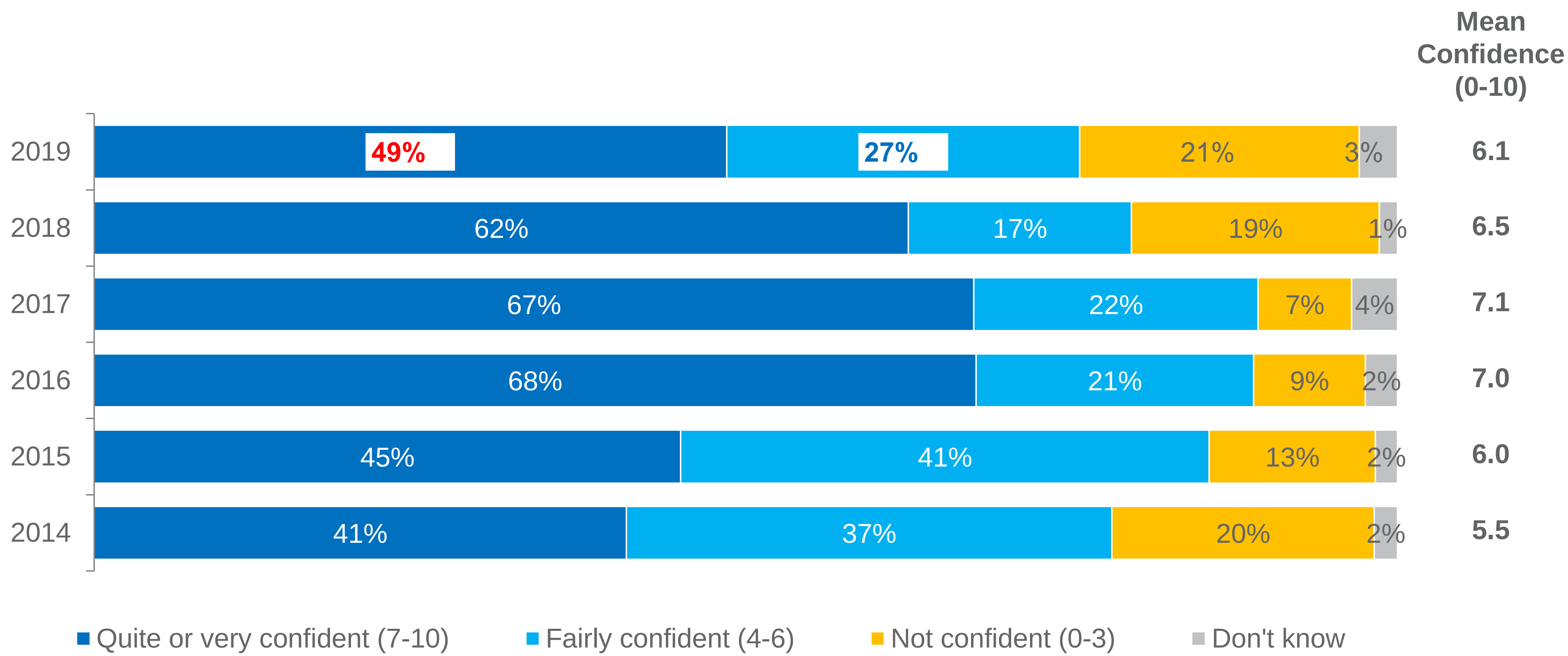


Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327); 2019 (n=800).

Information provision

Confidence in finding the right information to help choose energy plan

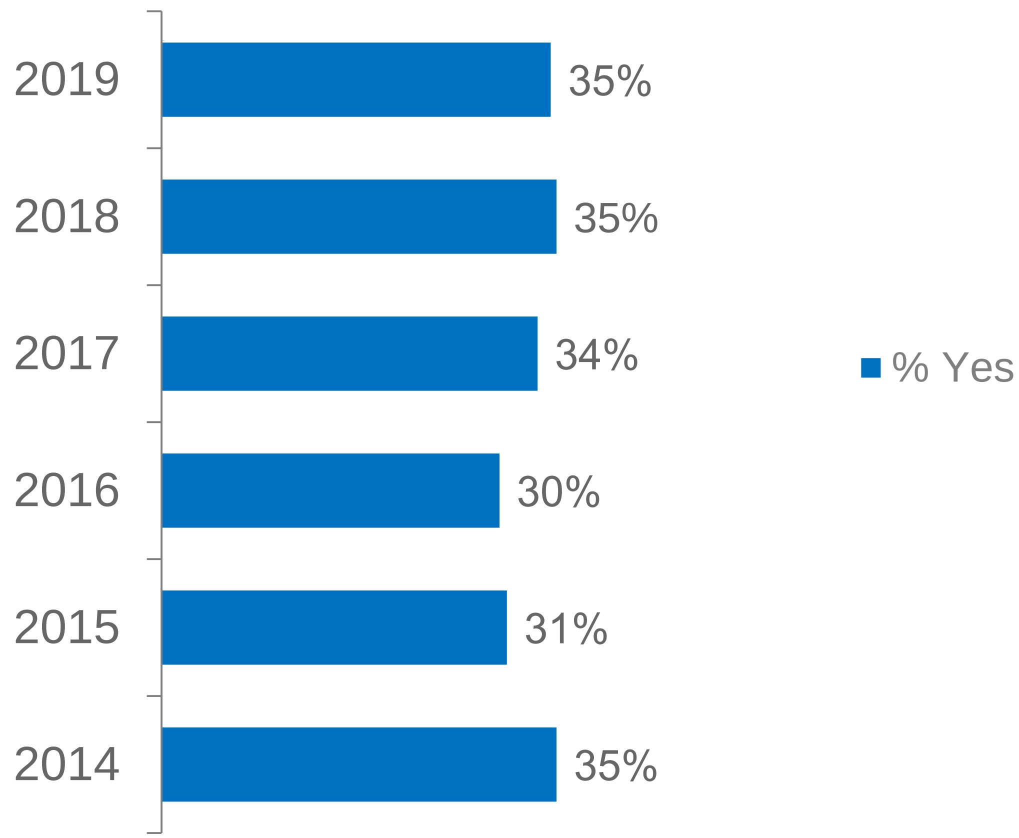
- Average self-rated confidence in finding the right information to help choose a suitable energy plan has continued to decrease from a high of 7.1 in 2017, to 6.5 in 2018, and finally to 6.1 in 2019.
- This decrease can be linked to a significant decrease in the proportion of businesses who answered 'quite or very confident' (42%, compared to 62% in 2018), and a significant increase for those who answered 'fairly confident' (27%, compared to 17% in 2018).
- Demographics that recorded a significantly higher mean confidence rating, included: businesses with 20-199 employees, metro businesses, VIC businesses.
- Demographics that recorded a significantly lower mean confidence rating, included: regional businesses, ROQ businesses.



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); 2019 (n=800).

Actively investigated different energy offers or options in past 12 months

- Just over a third of businesses (35%) in 2019 reported actively investigating different energy offers or options; this result is consistent with previous years.



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); 2019 (n=800).

Actively investigating by switching intentions

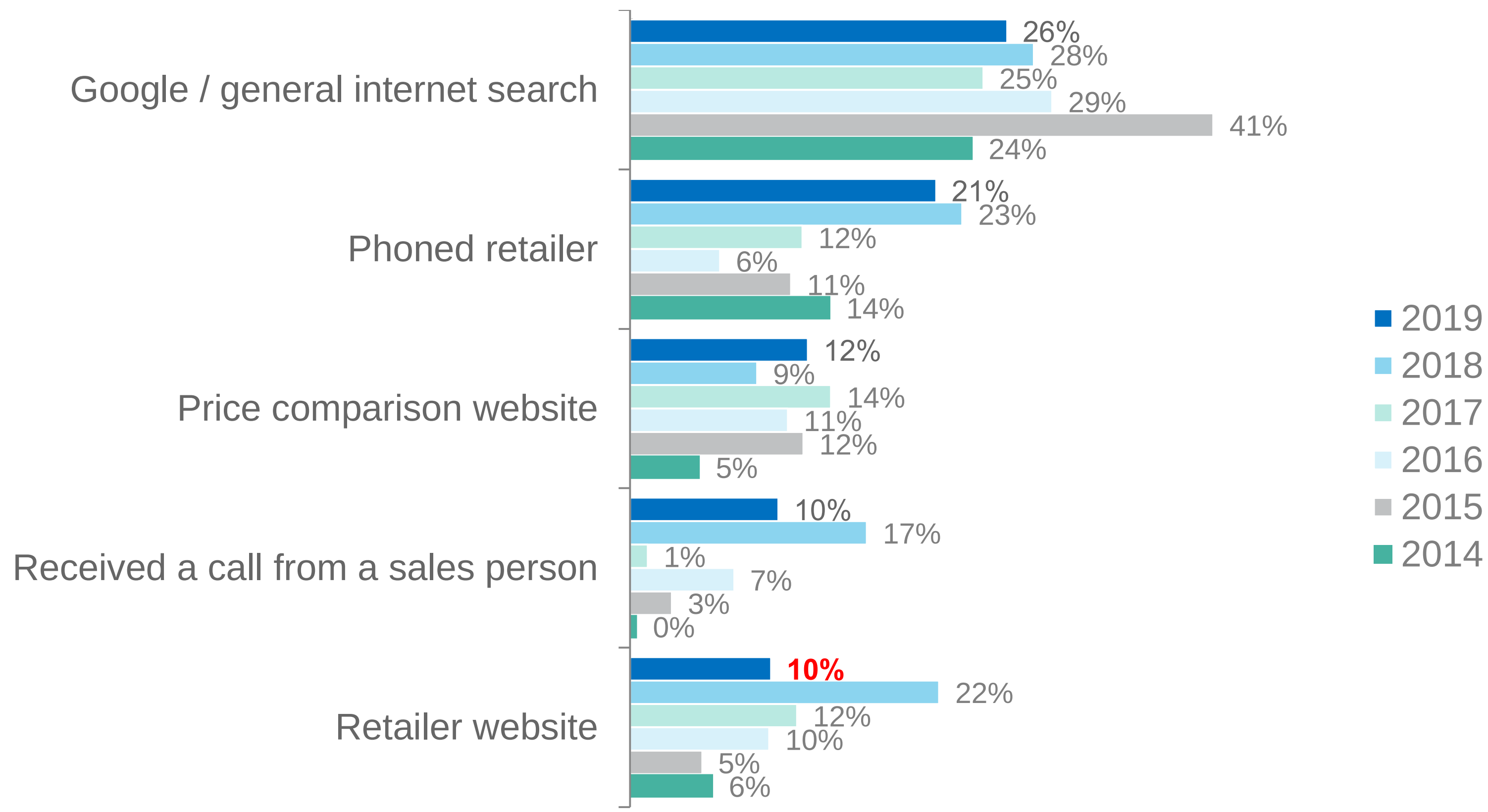
- Further analysis was conducted to examine how a propensity to actively investigate energy offers differed among those with different switching intentions. Businesses that are currently looking for a better deal or have recently switched are more likely to have actively investigated energy offers in the past 12 months. More specifically:
  - among small businesses who are currently looking for a better deal (n=69), 45% had actively investigated energy offers;
  - among small businesses who would be interested in switching but are not currently looking (n=266), 40% had actively investigated offers;
  - among small businesses who had recently switched (n=135), 58% had actively investigated energy offers;
  - among those who are not interested in switching providers (n=181), 8% had actively investigated offers; and
  - among small businesses who did not know they had any other options (n=142), 19% had actively investigated energy offers.

% Actively investigated by switching intentions (2019)				
We are currently looking for a better deal (n=69)	We would be interested in switching to a better deal but are not currently looking (n=266)	We recently switched our business energy provider or plan and so probably won't look for a better deal for a while (n=135)	We are not interested in switching our energy provider or plan (n=181)	We have no other options available here / only one provider (n=142)
45%	**40%**	**58%**	**18%**	**19%**

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)

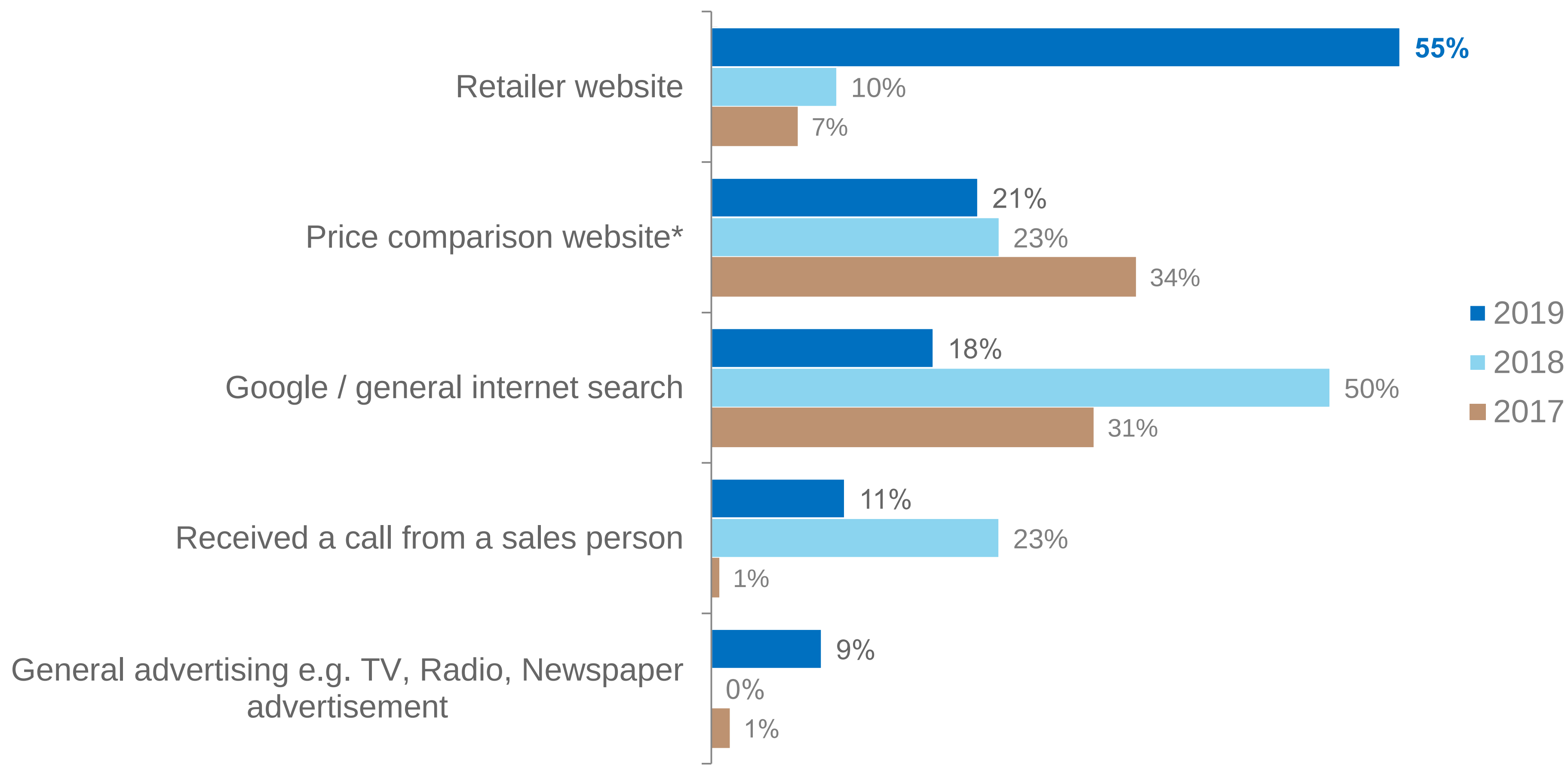
- 'Google/internet searching' remains the most common information sources to investigate switching options among business operators who had switched in the last 12 months (26% in 2019).
- Of note, businesses in 2019 were significantly less likely to answer 'retailer website' (10%, compared to 22% in 2018), and 'looked at price / best price / saving' (2%, compared to 22% in 2018); and were significantly more likely to answer 'brochures / flyers and other direct mail' (2%, compared to 0% in 2018).
- A number of significant differences were observed across demographics, including:
  - Businesses with 20-199 employees were more likely to use an energy broker/advisor and look at the best price or saving, those with 1-4 employees more likely to use general advertising.
  - Regional businesses were significantly more likely to not use any information sources.
  - NSW businesses more likely to rely on family/friend/colleague for information, VIC businesses more likely to use a real estate moving service.
  - Financial and Insurance Services industry more likely to use retailer website and brochures, Rental, Hiring and Real Estate Services industry more likely to use energy broker/advisor, Professional, Scientific and Technical Services more likely to use real estate moving service, Transport, Postal and Warehousing more likely to use a family/friend/colleague.



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); 2019 (n=408).

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

- Results from 2019 and 2018 should be interpreted with caution given small sample sizes.
- Despite the previous slide showing that only 10% of businesses who switched used a retailer website to investigate, 55% of those who investigated but did not switch used a retailer website.
- The retailer website was also significantly more likely to be used by businesses in 2019 (55%, compared to 10% 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); 2019 (n=13).
*Note: this question was a "please specify" question.

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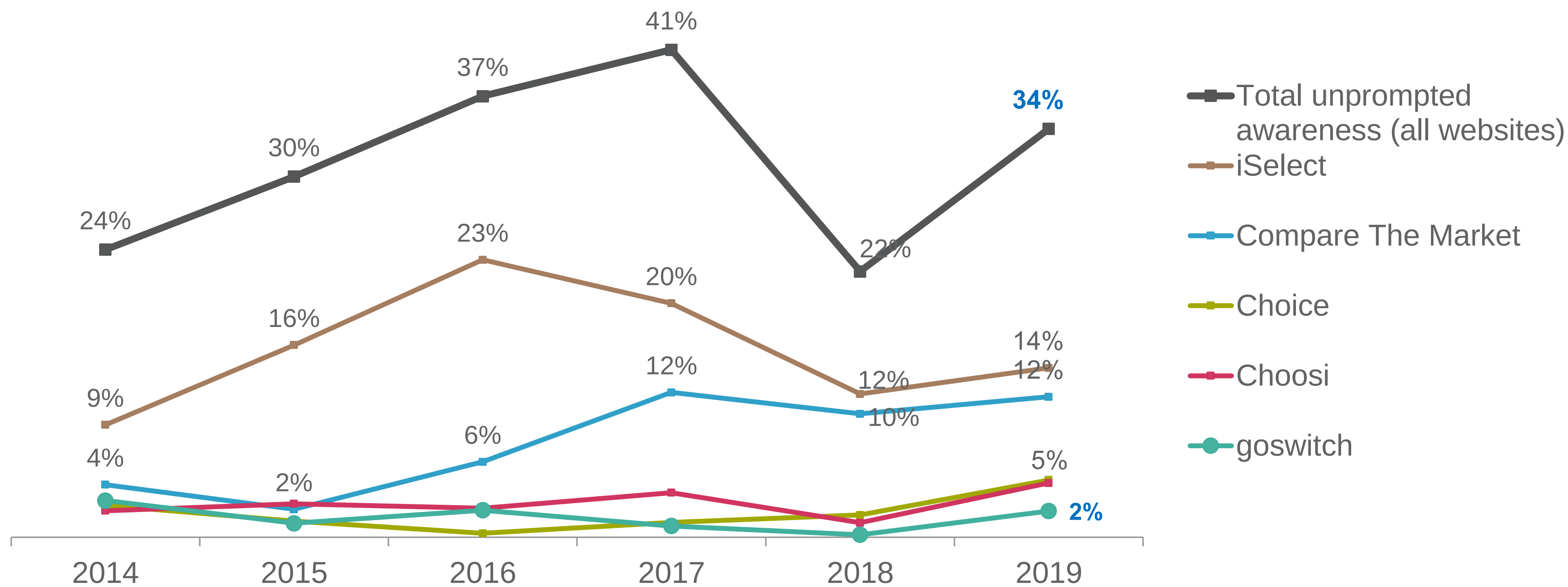
Unprompted awareness of comparison websites or services

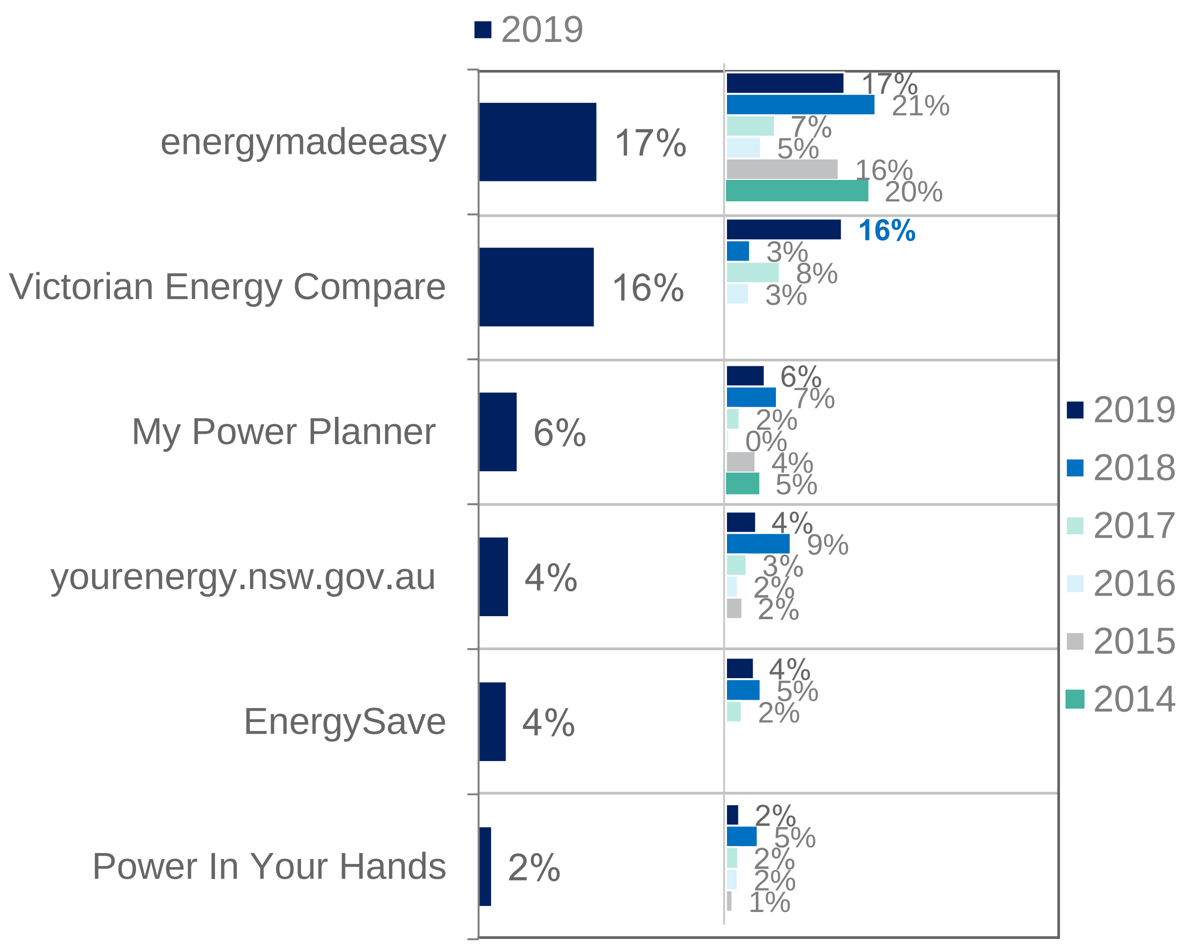
- Unprompted awareness of any comparison website was significantly higher in 2019 (34%, compared to 22% in 2018); however, respondents in 2019 were also significantly more likely to answer ‘don’t know’ (58%, compared to 35% in 2018). While these results appear contradictory, they can be explained due to the significant decrease in the response ‘none of the above’ (43% in 2018, 8% in 2019).
- iSelect (14%) and Compare The Market (12%) continue to be the standout comparison websites which are recalled.
- Specific comparison websites that respondents in 2019 were significantly more likely to recall included goswitch (2%, compared to 0% in 2018), and Energy watch (2%, compared to 0% in 2018).
- The following significant differences were observed by demographics:
  - Non-employing businesses more likely to be aware of Choice
  - Metro businesses more likely to be aware of iSelect, regional businesses more likely to answer ‘don’t know’
  - VIC businesses more likely to be aware of iSelect and Victorian Energy Compare
  - Professional, Scientific and Technical services industry more likely to be aware of Choice, Manufacturing more aware of One Big Switch and yourenergy.nsw.gov.au, Administrative and Support Services more aware of My Power Planner and Victorian Energy Compare, Accommodation and Food Services more aware of Electricity Wizard.

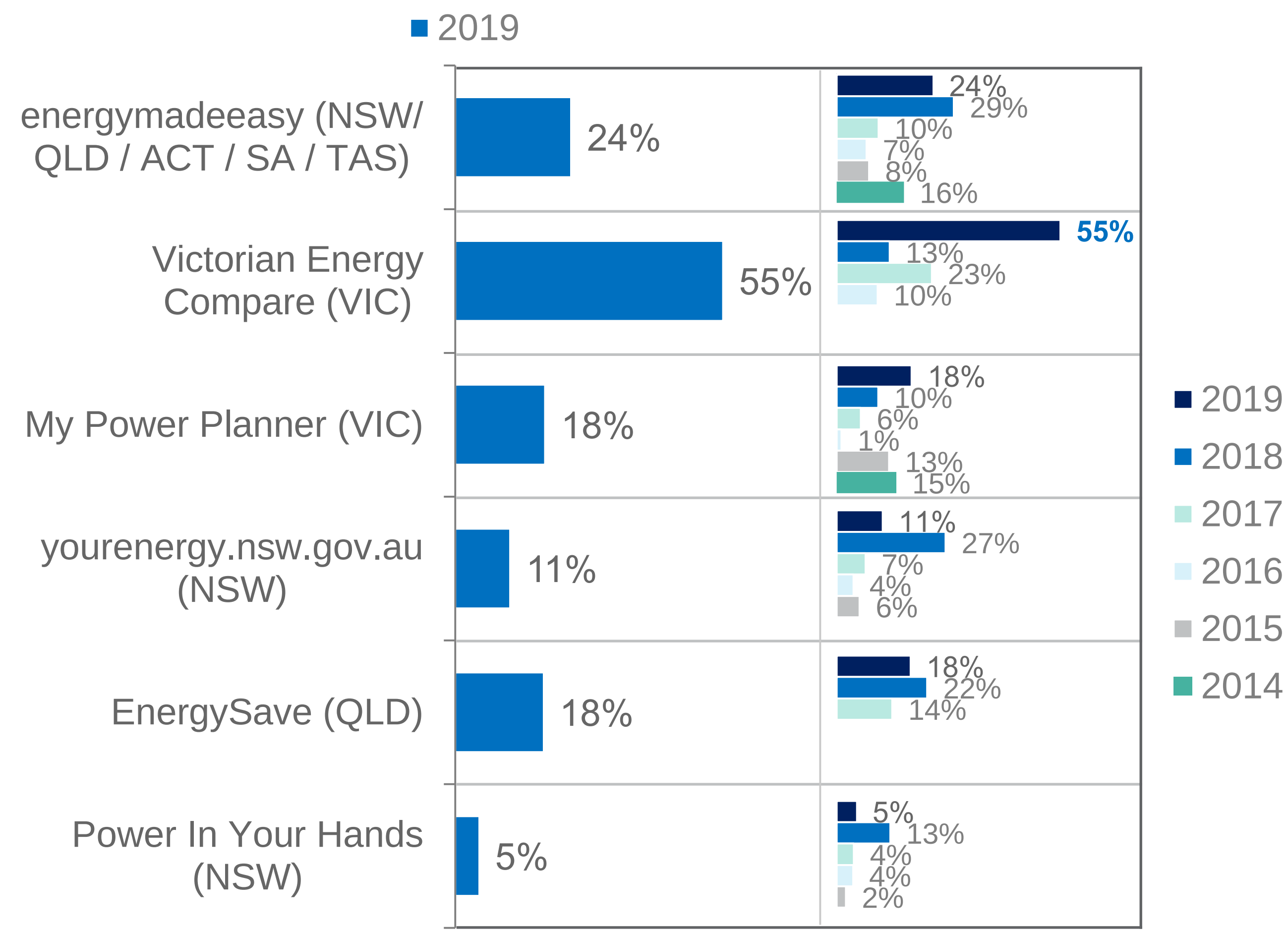


Q38. Are you aware of any comparison websites or services that can help customers choose a good energy deal for their business? Any others?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327); 2019 (n=800).

Awareness of government comparison websites or campaigns

- After recalling comparison websites by top of mind, businesses were then asked follow up questions if they had heard of various government comparison websites.
- Total awareness of Victorian Energy Compare increased significantly from 3% in 2018 to 16% in 2019. Further, over half of VIC businesses (55%) are aware of Victorian Energy Compare, increasing significantly from 13% in 2018.

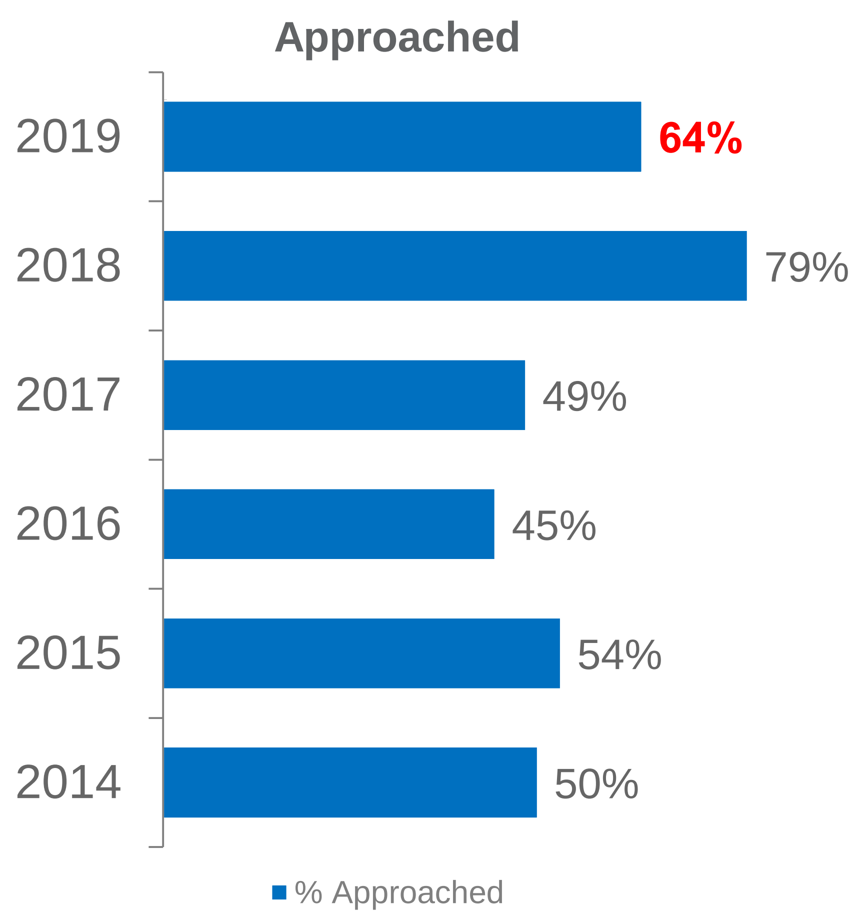


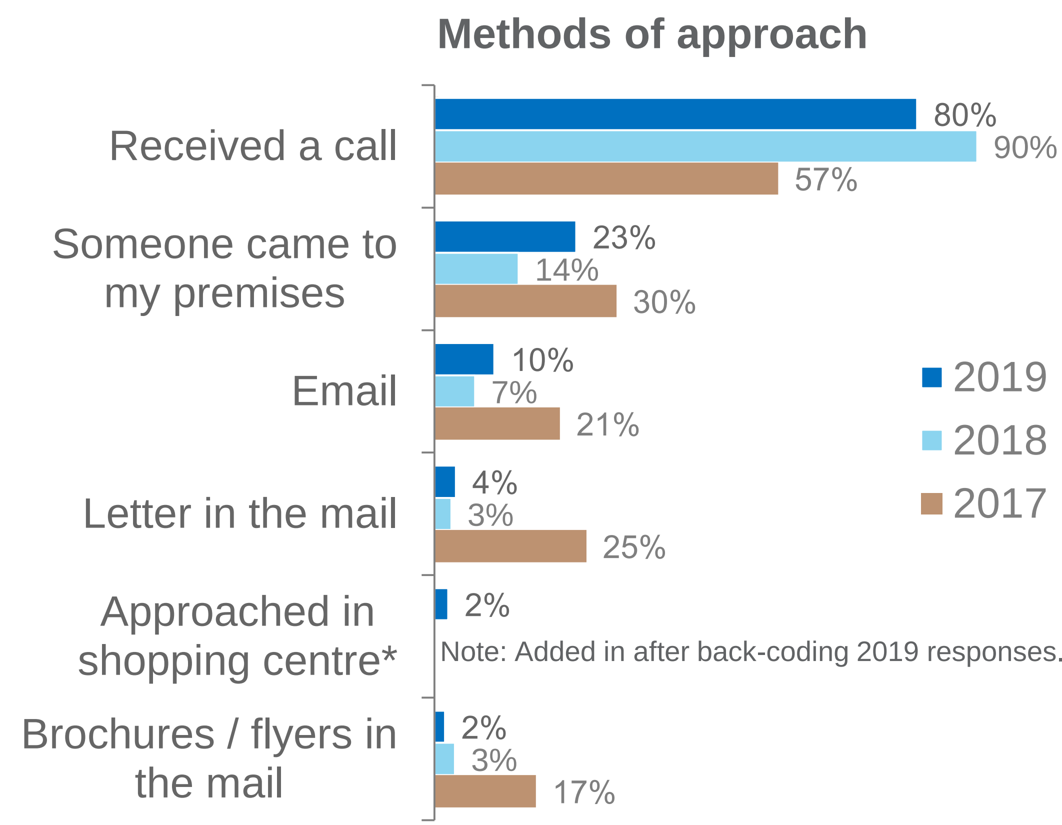


Awareness of energy retailer comparison websites (combination of Q38, 39, 40, 63, 82).
Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327); 2019 (n=800).

Approached by alternative energy retailer in past 12 months

- Almost two-thirds (64%) of businesses in 2019 reported being approached by an alternate energy company in the past 12 months; this was significantly lower than the 79% observed in 2018.
- Receiving a call continues to be the dominant method of approach (80%), followed by someone coming to their premises (23%) and email (10%).
- Demographics that were significantly more likely to be approached included metro businesses and VIC/SA businesses. Conversely, those less likely to be approached included regional businesses and ROQ/TAS/ACT businesses.

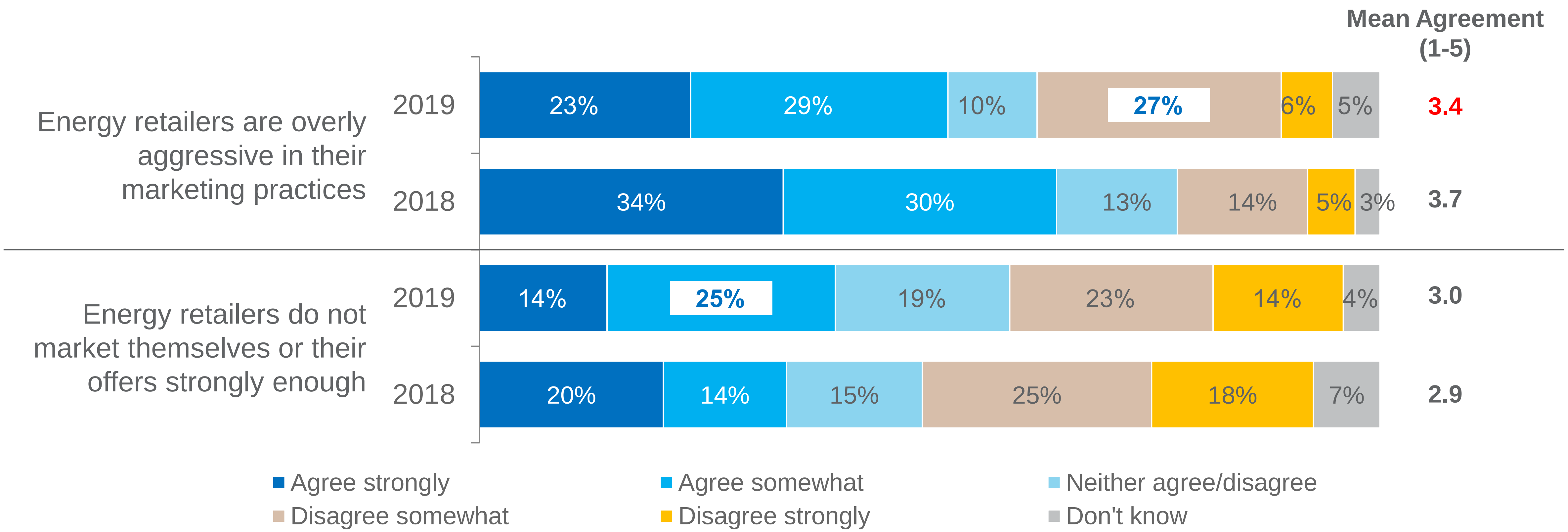




Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327); 2019 (n=800).
Q18B. In what ways was your business approached by an energy company?
Base: NEM participants that were approached by an energy company: 2017 (n=211); 2018 (n=221); 2019 (n=437).

Marketing and information from energy retailers

- Compared to 2018 data, businesses in 2019 feel that energy retailers are not as forthcoming in marketing themselves.
- There was significantly lower agreement on average with the statement that ‘energy retailers are overly aggressive in their marketing practices’ (3.4 in 2019, compared to 3.7 in 2018).
- Furthermore, businesses in 2019 were significantly more likely to ‘agree somewhat’ with the statement, ‘energy retailers do not market themselves or their offers strongly enough’ (25%, compared to 14% overall).
- Across demographics, mean agreement with the statement ‘energy retailers are overly aggressive in their marketing practices’ was significantly higher for VIC businesses and significantly lower for ROQ/TAS businesses.
- ACT businesses and the Construction industry recorded significantly higher mean agreement with the statement ‘energy retailers do not market themselves or their offers strongly enough’, whereas VIC businesses recorded a significantly lower mean agreement.

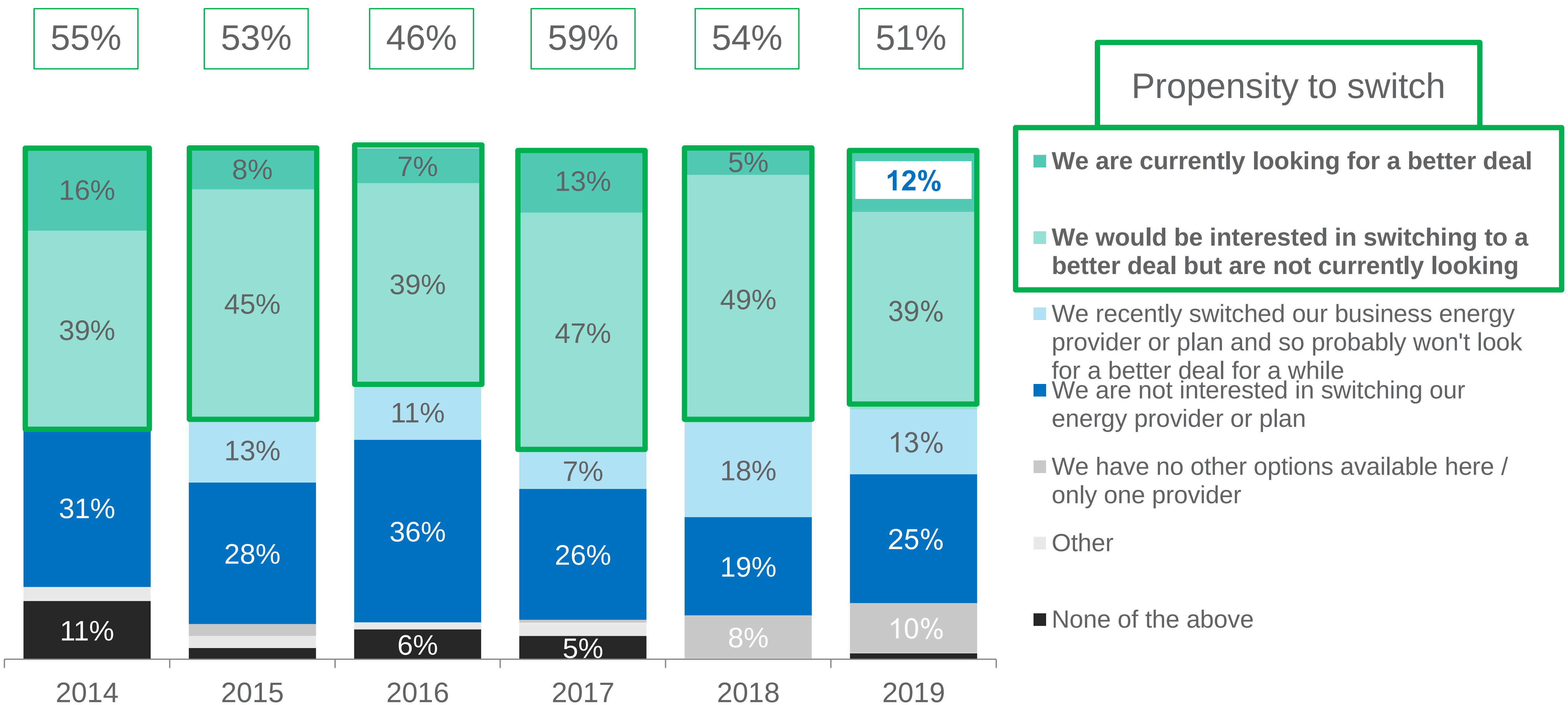


Q18C. Generally speaking, to what extent do you agree or disagree with each of the following statements in relation to marketing and information from energy retailers?
Base: All NEM participants: 2018 (n=327); 2019 (n=800).

Switching behaviours and outcomes

Intentions to switch in the future

- Just over half of all businesses in 2019 indicated a propensity to switch (51%), down from 54% in 2018 but generally consistent with previous years that range from 46% to 59%.
- Businesses in 2019 were significantly more likely to indicate they are currently looking for a better deal (12%, compared to 5% in 2018).
- The total propensity to switch was significantly higher among NSW businesses and the Construction industry.
- Metro businesses were significantly more likely to indicate they are not interested in switching their energy provider or plan, whereas regional businesses were significantly more likely to indicate they have no other options available.



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); 2019 (n=800).

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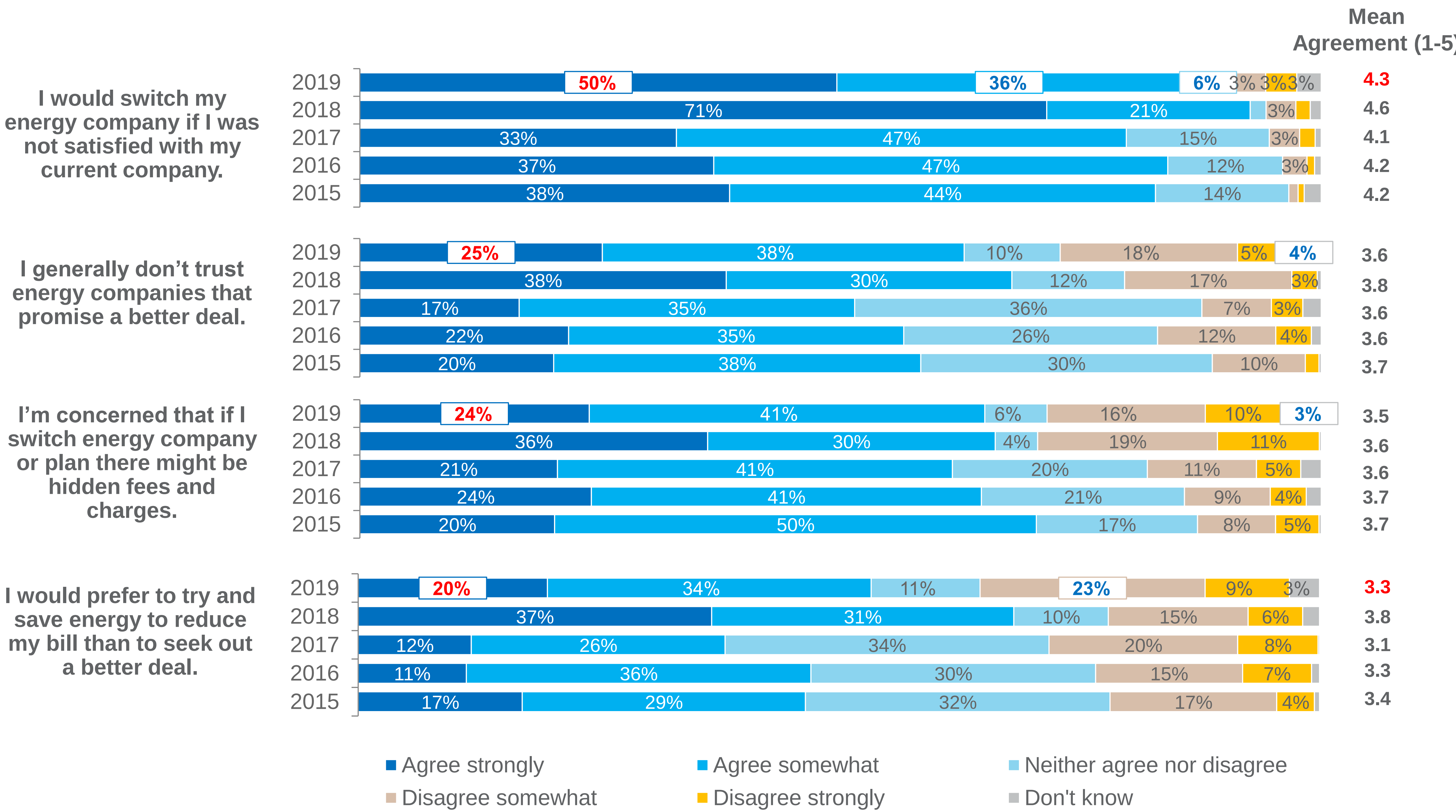
Attitudes towards switching summary

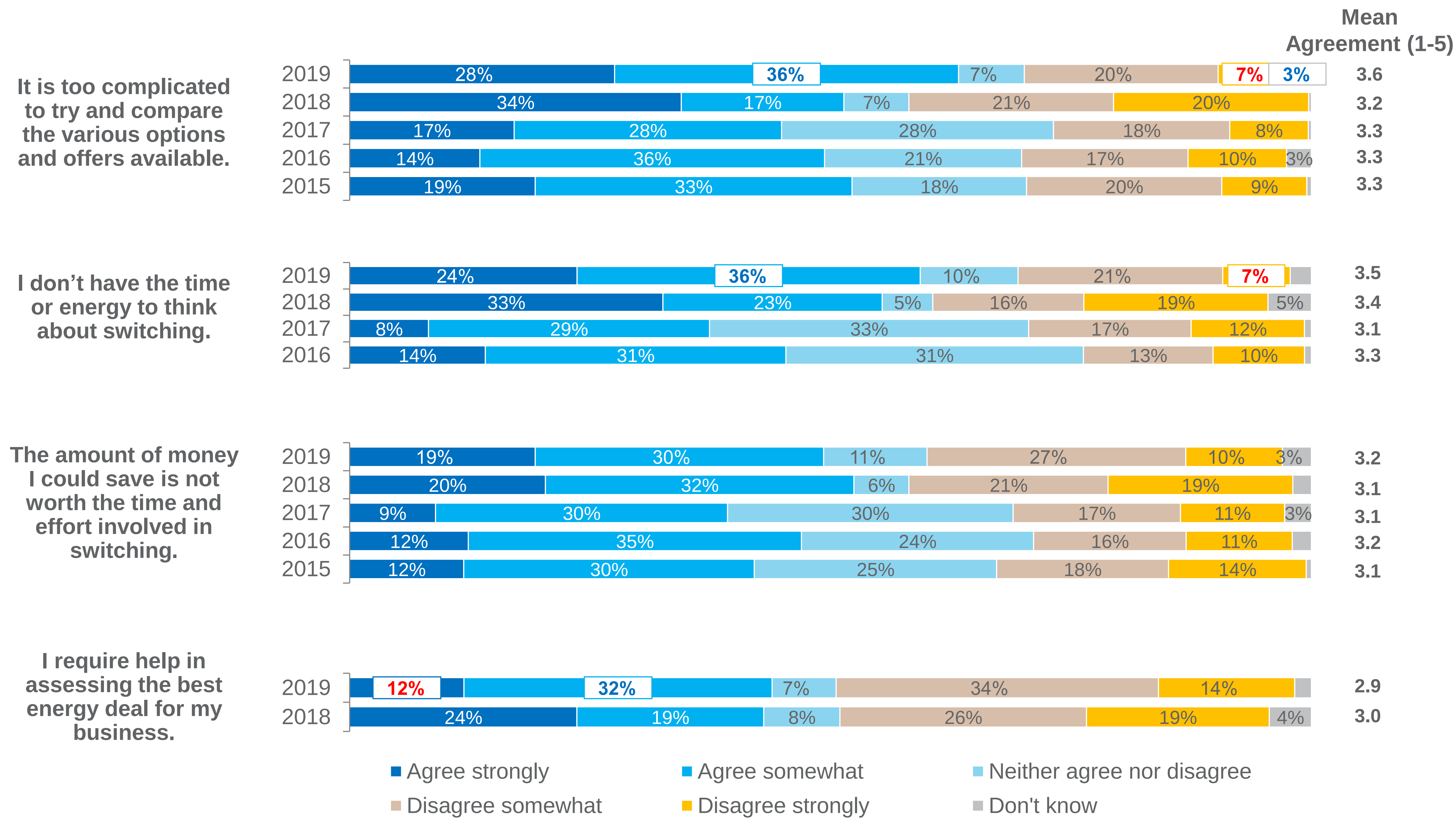
- As in previous waves of the study, business operators were asked a range of questions to explore their attitudes towards switching.
- Compared to 2018, there was a significant decrease in the average agreement with the statement 'I would switch my energy company if I was not satisfied with my current company' (4.3 in 2019, compared to 4.6 in 2018).
- Furthermore, the four statements which recorded the highest mean agreements all saw significant decreases for the response 'strongly agree', this includes:
  - 'I would switch my energy company if I was not satisfied with my current company' (50% strongly agree in 2019, compared to 71% in 2018).
  - 'I generally don't trust energy companies that promise a better deal' (25% strongly agree in 2019, compared to 38% in 2018).
  - 'I'm concerned that if I switch energy company or plan there might be hidden fees and charges' (24% strongly agree in 2019, compared to 36% in 2018).
  - 'I would prefer to try and save energy to reduce my bill than to seek out a better deal.' (20% strongly agree in 2019, compared to 37% in 2018).
- The following significant differences were observed across demographics:
  - The statement 'I would switch my energy company if I was not satisfied with my current company' attracted higher average agreement from metro, SEQ/SA, Rental, Hiring and Real Estate Services industry businesses, and lower average agreement from regional and ROQ/TAS businesses.
  - Non-employing businesses recorded significantly higher average agreement with the statement 'It is too complicated to try and compare the various options and offers available'.
  - Businesses with 20-199 employees recorded significantly lower average agreement with:
    - 'I generally don't trust energy companies that promise a better deal';
    - 'I'm concerned that if I switch energy company or plan there might be hidden fees and charges';
    - 'It is too complicated to try and compare the various options and offers available'; and
    - 'I don't have the time or energy to think about switching.'

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); 2019 (n=800).

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); 2019 (n=800).

Switching behaviours

Rates of switching in the last 5 years

- Switching either a provider or plan in the past 5 years has decreased from 70% in 2018 to 63% in 2019, however this is still well above 2014-2017 results which range from 44% to 53%.
- ACT businesses and those in the Health Care and Social Assistance industry were significantly less likely to switch ‘any’ electricity (company and/or plan) in the last 5 years

	2019	2018	2017	2016	2015	2014
Electricity company	48%	54%	37%	34%	38%	38%
Electricity plan	31%	41%	29%	23%	33%	35%
TOTAL Electricity Company and/or Plan	63%	70%	45%	43%	50%	51%
TOTAL Electricity or Gas Company and/or Plan	63%	70%	47%	44%	51%	53%
Consumers with mains gas	**2019**	**2018**	**2017**	**2016**	**2015**	**2014**
Gas company	41%	47%	32%	10%	14%	46%
Gas plan	24%	31%	29%	6%	14%	48%
TOTAL Gas Company and/or Plan	49%	48%	43%	15%	18%	61%

Q17. In the past 5 years, how many times has your business changed the following?
Base: All participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=325), 2019 (n=645, note ROQ and TAS participants were not asked this question). Gas participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=96); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60); 2019 (n=157).

Rates of switching in the last 5 years by State

- Compared to 2018 results, switching rates (electricity or gas company/plan) for businesses in 2019 increased for those in ACT and SA, but decreased for those in VIC, NSW and SEQ.
- Gas business data for 2018 has not been included for comparison due to small sample sizes.

	NEM*		VIC		NSW		ACT		SA		SEQ	
	2018 (n=325)	2019 (n=645)	2018 (n=74)	2019 (n=146)	2018 (n=76)	2019 (n=150)	2018 (n=37)	2019 (n=68)	2018 (n=69)	2019 (n=146)	2018 (n=69)	2019 (n=135)
Electricity company	54%	48%	60%	60%	59%	46%	23%	36%	43%	46%	50%	31%
Electricity plan	41%	31%	40%	23%	51%	37%	28%	32%	26%	33%	40%	32%
TOTAL Electricity Company and/or Plan	70%	63%	74%	64%	76%	67%	39%	47%	52%	59%	71%	53%
TOTAL Electricity or Gas Company and/or Plan	70%	63%	74%	64%	76%	67%	39%	47%	53%	62%	71%	53%
Consumers with mains gas	NEM*		VIC		NSW		ACT		SA		SEQ	
	2018 (n=60)	2019 (n=157)	2018 (n=26)	2019 (n=60)	2018 (n=14)	2019 (n=30)	2018 (n=4)	2019 (n=23)	2018 (n=14)	2019 (n=30)	2018 (n=2)	2019 (n=14)
Gas company	47%	41%	-	49%	-	33%	-	22%	-	36%	-	5%
Gas plan	31%	24%	-	24%	-	28%	-	22%	-	23%	-	7%
TOTAL Gas Company and/or Plan	48%	49%	-	52%	-	58%	-	33%	-	38%	-	7%

*Note: NEM data for this question excludes businesses in TAS and ROQ.
Q17. In the past 5 years, how many times has your business changed the following?
Base: All participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=325), 2019 (n=645). Gas participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=96); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60); 2019 (n=157).

Rates of switching in the last 12 months

- Around 3 out of 10 businesses in 2019 have switched their company or plan in the last 12 months (29%).
- ACT businesses were significantly less likely to switch ‘any’ electricity (company and/or plan) in the last 12 months.

	2019	2018	2017	2016	2015	2014
Electricity company	18%	19%	11%	11%	18%	0%
Electricity plan	14%	17%	11%	9%	19%	0%
TOTAL Electricity Company and/or Plan	28%	31%	17%	17%	28%	0%
TOTAL Electricity or Gas Company and/or Plan	29%	32%	20%	18%	28%	0%
Consumers with mains gas	**2019**	**2018**	**2017**	**2016**	**2015**	**2014**
Gas company	20%	30%	10%	4%	7%	0%
Gas plan	10%	24%	13%	5%	8%	0%
TOTAL Gas Company and/or Plan	27%	33%	19%	8%	9%	0%

Q17. In the past 12 months, how many times has your business changed the following?
Base: All participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=325), 2019 (n=645). Gas participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=96); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60); 2019 (n=157).

Rates of switching in the last 12 months by State

- SEQ businesses were significantly less likely to have switched company or plan in 2019 (16%, compared to 45% in 2018).
- SA businesses were significantly more likely to have switched their electricity plan in 2019 (18%, compared to 5% in 2018).
- Gas business data for 2018 has not been included for comparison due to small sample sizes.

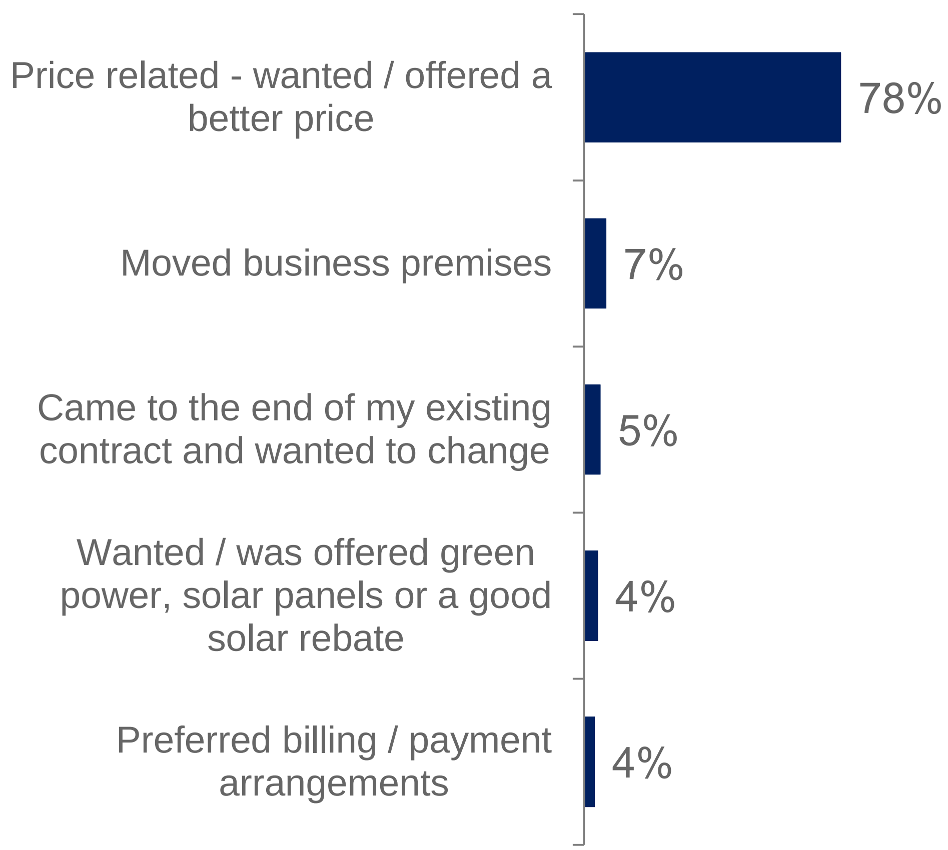
	NEM*		VIC		NSW		ACT		SA		SEQ	
	2018 (n=325)	2019 (n=645)	2018 (n=74)	2019 (n=146)	2018 (n=76)	2019 (n=150)	2018 (n=37)	2019 (n=68)	2018 (n=69)	2019 (n=146)	2018 (n=69)	2019 (n=135)
Electricity company	19%	18%	28%	28%	11%	15%	9%	19%	14%	12%	24%	10%
Electricity plan	17%	14%	16%	13%	19%	17%	5%	9%	5%	**18%**	24%	**8%**
TOTAL Electricity Company and/or Plan	31%	28%	34%	36%	28%	27%	12%	23%	19%	29%	45%	**16%**
TOTAL Electricity or Gas Company and/or Plan	32%	29%	34%	38%	29%	27%	12%	23%	19%	32%	45%	**16%**
Consumers with mains gas	NEM*		VIC		NSW		ACT		SA		SEQ	
	2018 (n=60)	2019 (n=157)	2018 (n=26)	2019 (n=60)	2018 (n=14)	2019 (n=30)	2018 (n=4)	2019 (n=23)	2018 (n=14)	2019 (n=30)	2018 (n=2)	2019 (n=14)
Gas company	30%	20%	-	22%	-	24%	-	0%	-	11%	-	5%
Gas plan	24%	10%	-	12%	-	7%	-	0%	-	10%	-	7%
TOTAL Gas Company and/or Plan	33%	27%	-	29%	-	30%	-	0%	-	21%	-	7%

*Note: NEM data for this question excludes businesses in TAS and ROQ.
Q17. In the past 12 months, how many times has your business changed the following?
Base: All participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=325), 2019 (n=645).
Gas participants in VIC/NSW/ACT/SA/SEQ: 2014 (n=96); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60); 2019 (n=157).

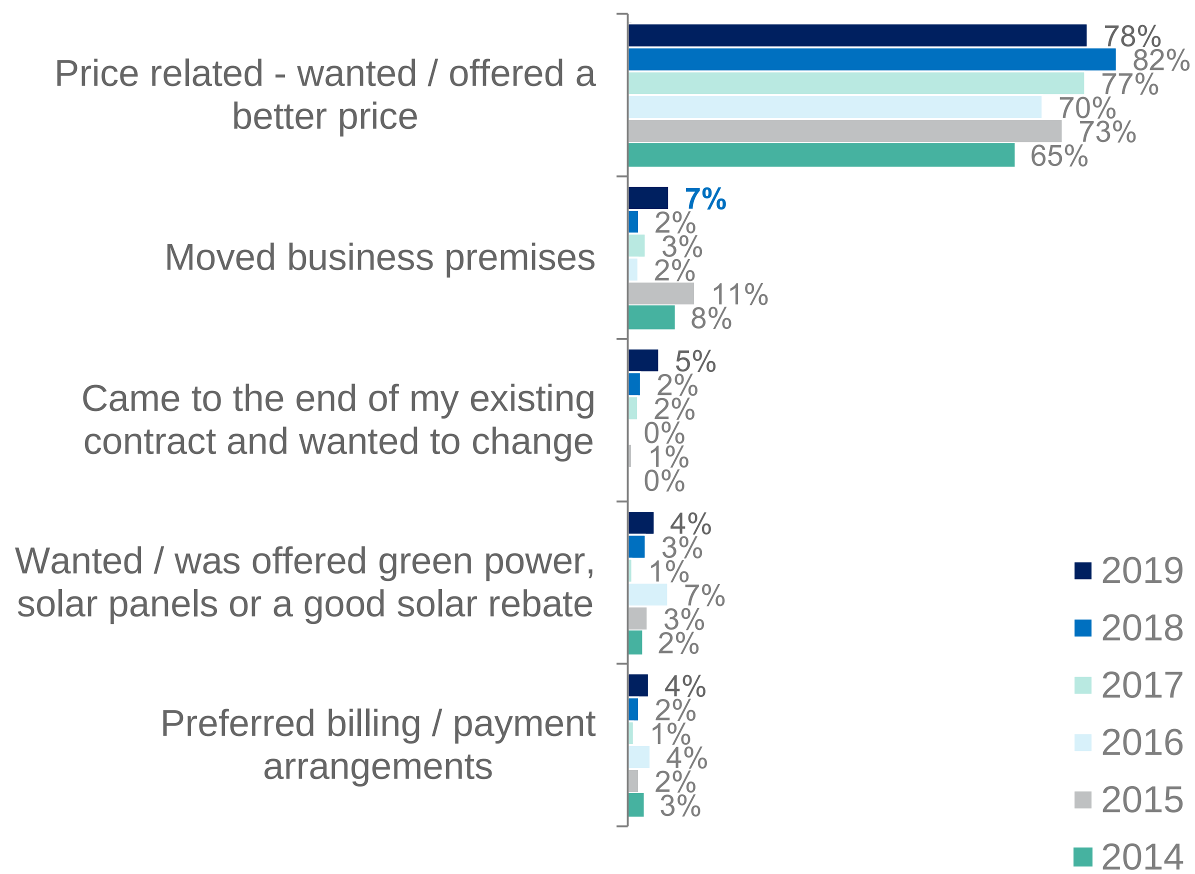
Reasons for switching (unprompted)

- The main reason for switching continued to be motivated by price (either wanting a better price or being offered a better price), with 78% of those who switched in 2019 providing this response.
- Businesses that switched company or plan in 2019 were significantly more likely to cite ‘moved business premises’ as a reason for their switch (7%, compared to 2% in 2018).

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 (excluding ROQ and TAS) 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); 2019 (n=408).

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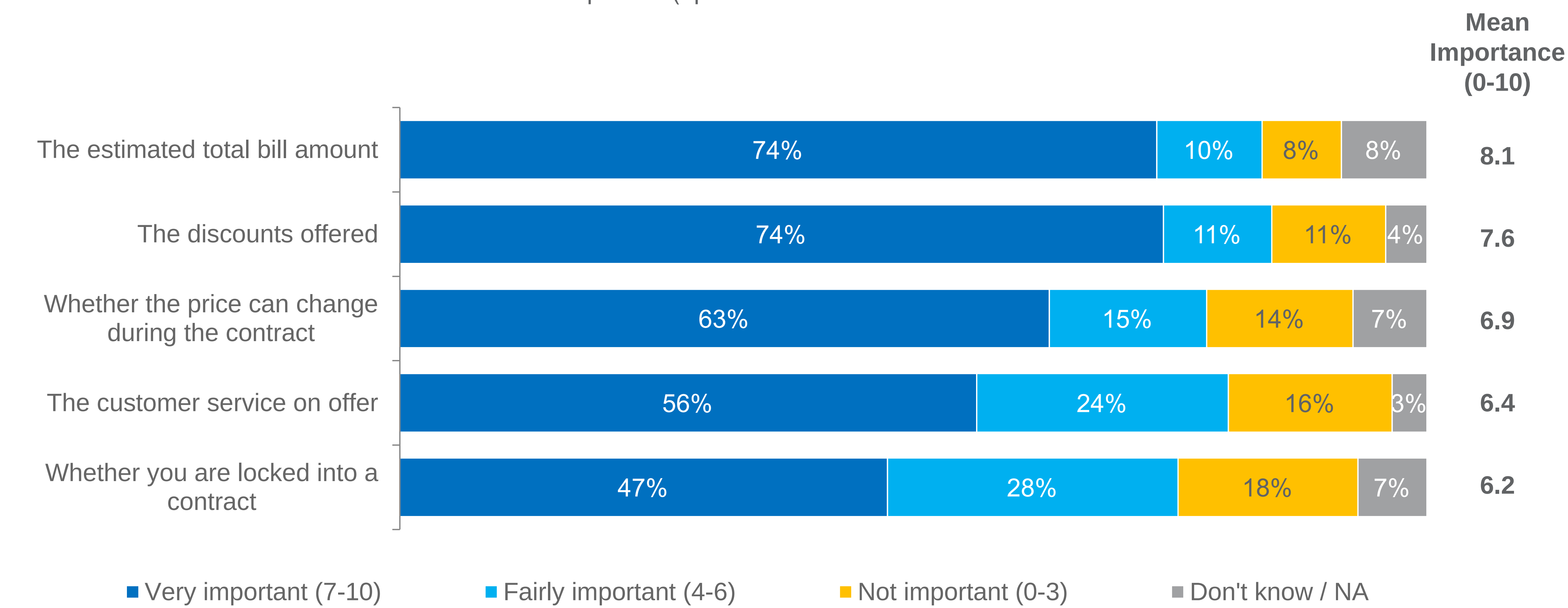
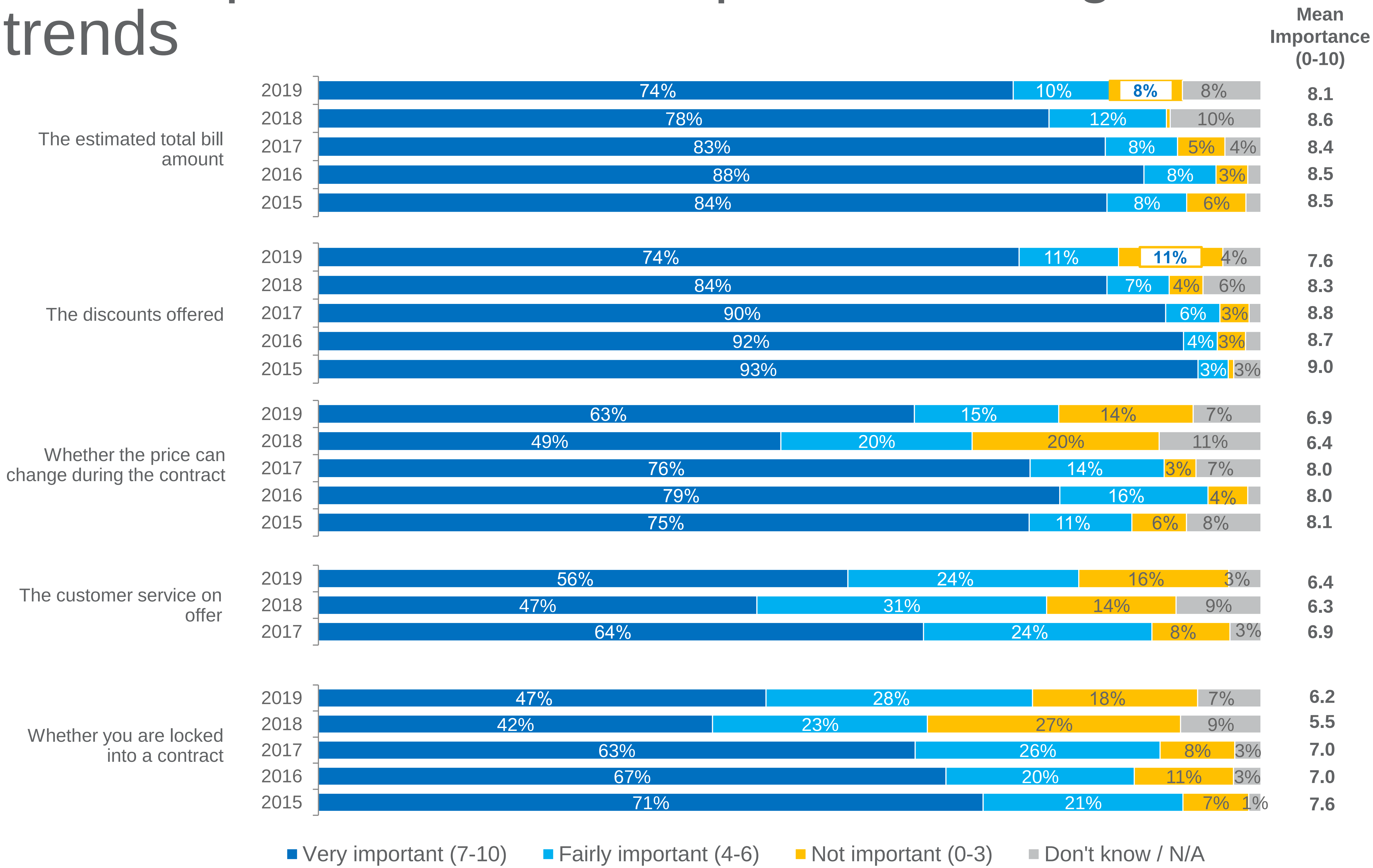
Most important factors in past switching (2019)

- Those that had switched provider or plan were asked to rate the importance of a number of factors in terms of why they switched.
- In general, factors that were rated as the most important in 2018 continued to be in 2019.
- Although 'the estimated total bill amount' and 'the discounts offered' continued to be the two most important factors, the proportion of respondents who answered 'not important' to these factors increased significantly from 2018, specifically:
  - 8% consider 'the estimated total bill amount' as not important (up from 0% in 2018); and
  - 11% consider 'the discounts offered' as not important (up from 4% in 2018.



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 2019 who have switched energy company, plan or deal in the past 5 years (n=408)

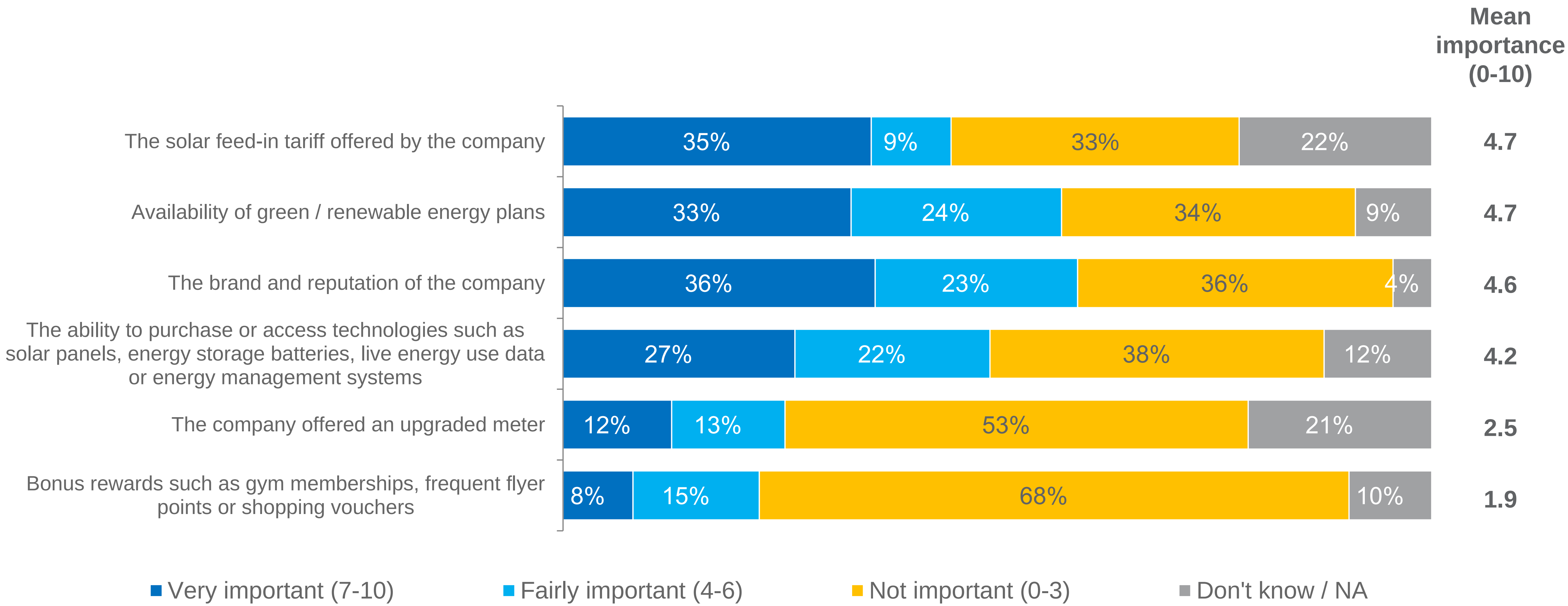
Most important factors in past switching - trends



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); 2019 (n=408).

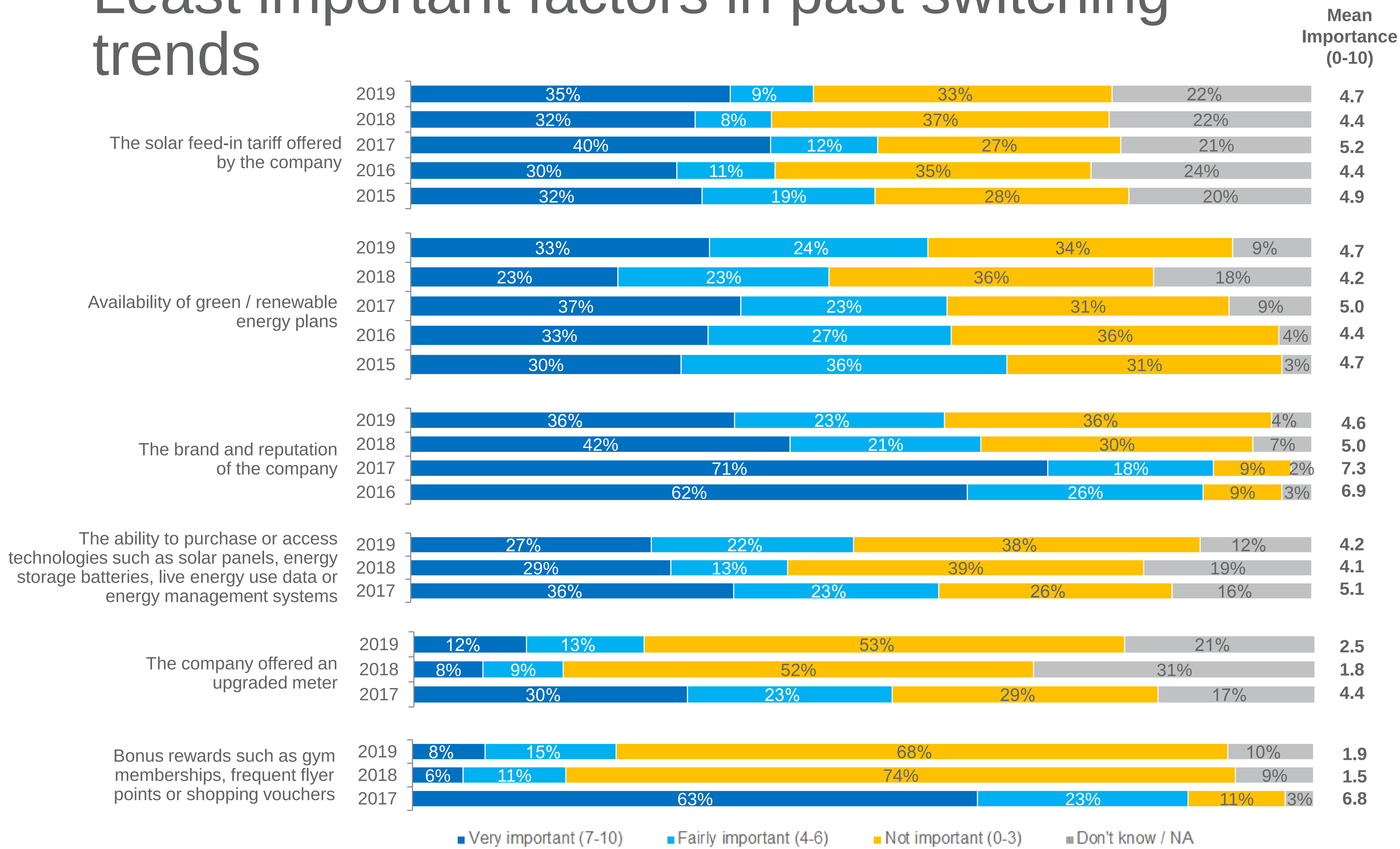
Least important factors in past switching (2018)

- Overall, factors that were considered of less importance in 2018 continued to be in 2019.
- Not surprisingly, those with solar panels were significantly more likely to record a higher mean importance rating for the statements, 'the solar feed-in tariff offered by the company' and 'the ability to purchase or access technologies such as solar panels, energy storage batteries, live energy use data or energy management systems'.



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 2019 who have switched energy company, plan or deal in the past 5 years (n=408)

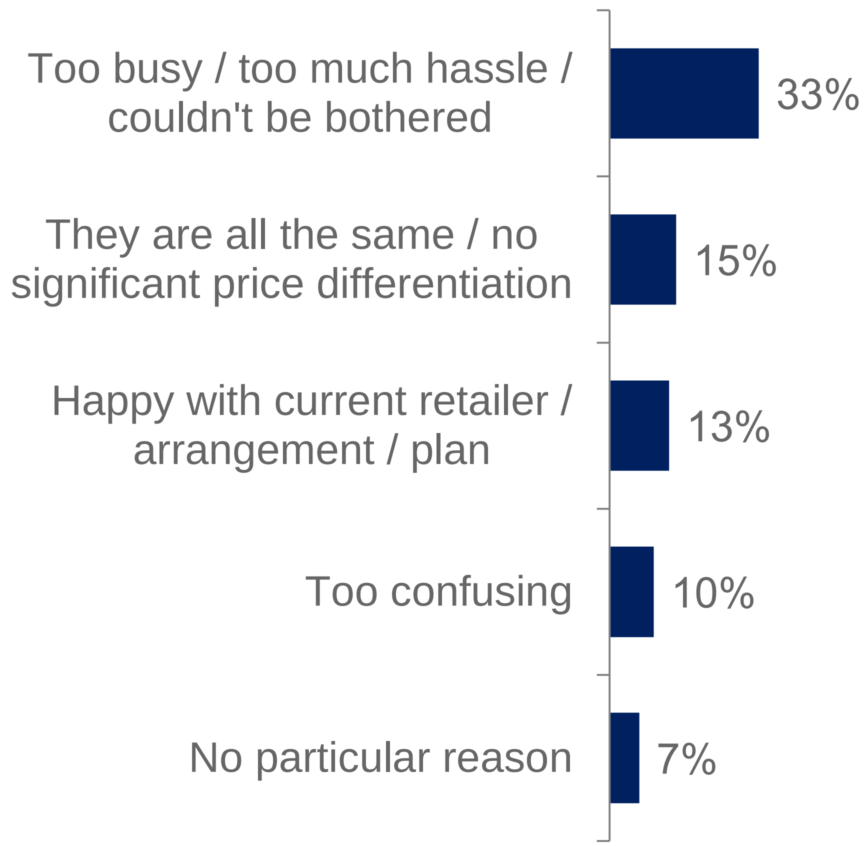
Least important factors in past switching - trends

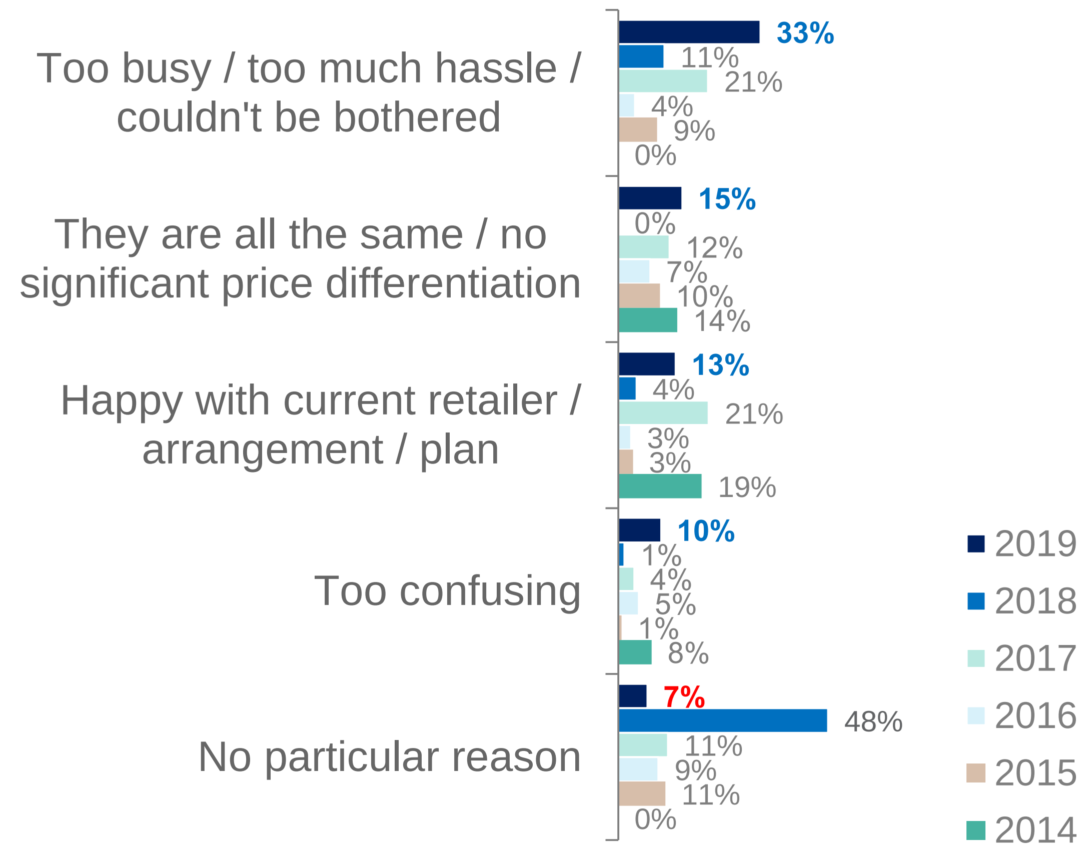


Q49. I am going to read out a range of factors. For each one please rate how important it was in your decision to switch your business's energy company, plan or deal where 0 means not at all and 10 means extremely important?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years: 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210); 2019 (n=408).

Reasons for not switching

- A third of those who have not switched in the past 5 years or investigated options in the past 12 months cited ‘too busy / too much hassle / couldn’t be bothered’ as a reason for not taking any action (33%, a significant increase from 11% in 2018).
- Other common reasons for not taking action included ‘they are all the same / no significant price differentiation’ (15%), ‘happy with current retailer / arrangement / plan’ (13%), and ‘too confusing’ (10%); each of these reasons were significantly more likely to be provided in 2019 compared to 2018 results.





Q33. 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 investigated or switched in the past 5 years in 2015: (n=39); 2016 (n=44); 2017 (n=259); 2018 (n=114); 2019 (n=64, note the full number of NEM participants who did not investigate or switch in the past 5 years in 2019 was n=197, however data was only collected for those who answered ‘0’ for all Q17 questions (e.g. those that answered ‘0’ and ‘don’t know/NA’ for all Q17 questions were not asked Q33).

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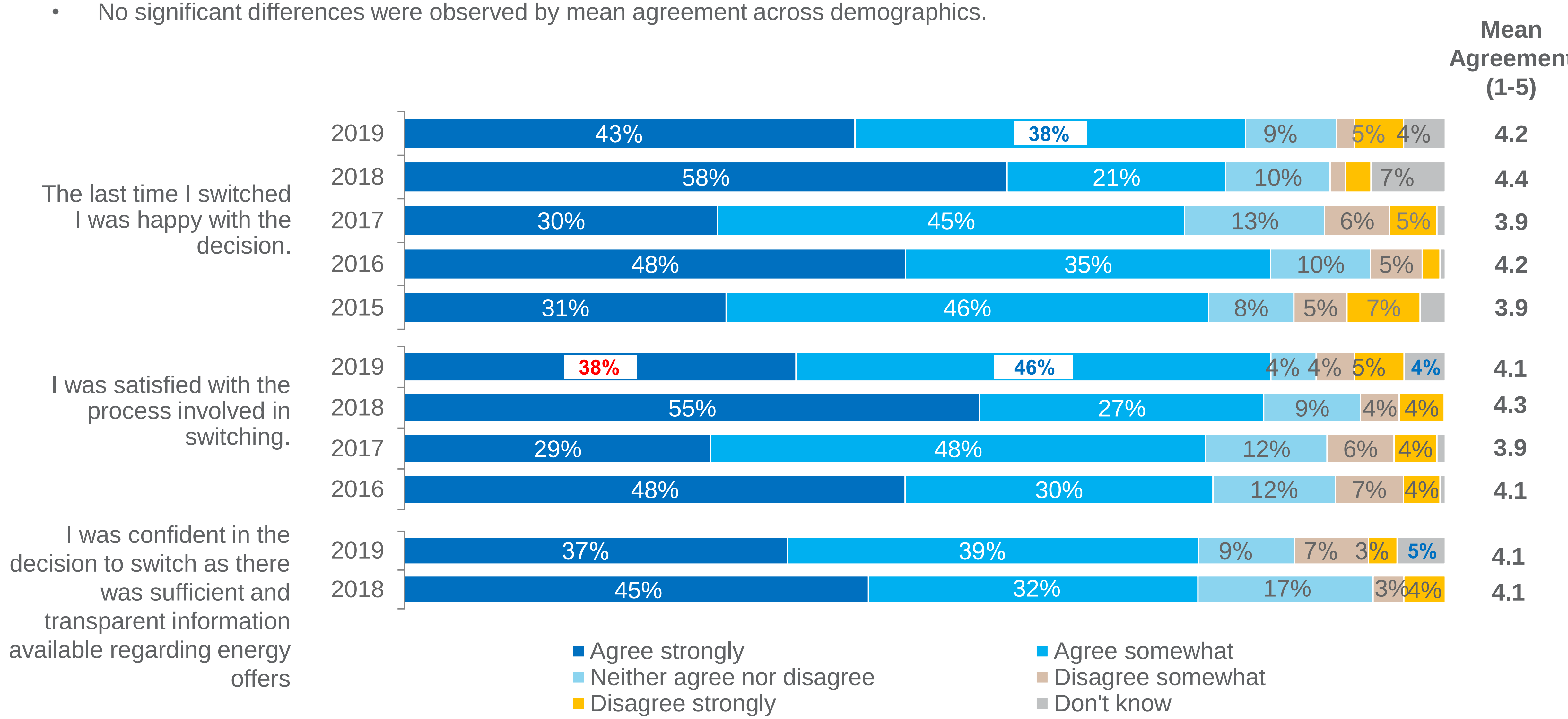
Switching outcomes

Switching outcomes

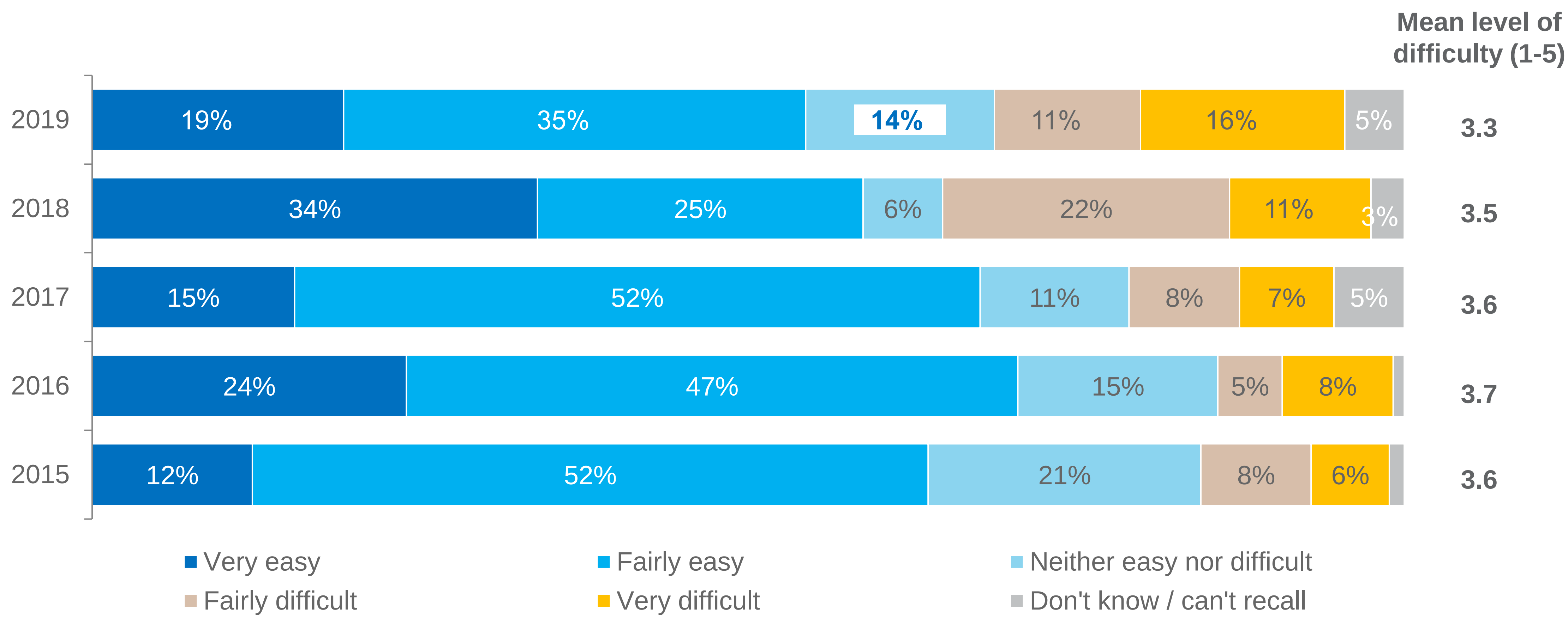
- Overall, those that reported switching provider or plan within the past 5 years continue to be satisfied with the outcome.
- Of some concern, the 2019 results show a shift from answering 'agree strongly' to only 'agreeing somewhat' with two of the positively framed statements about switching outcomes. More specifically, the following significant differences were observed:
  - Businesses in 2019 were more likely to answer 'agree somewhat' to 'the last time I switched I was happy with the decision' (38%, compared to 21% in 2018).
  - Businesses in 2019 were less likely to answer 'agree strongly' to 'I was satisfied with the process involved in switching (38%, compared to 55% in 2018), and more likely to answer 'agree somewhat' (46%, compared to 27% in 2018).
- No significant differences were observed by mean agreement across demographics.



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); 2019 (n=408).

Ease of comparing offers

- The average level of ease of comparing alternate offers when deciding whether or not to switch dropped to a new low of 3.3 in 2019 (compared to means ranging from 3.5 to 3.7 between 2015 to 2018).
- Businesses in 2019 were significantly more likely to answer ‘neither easy nor difficult’ (14%, compared to 6% in 2018).

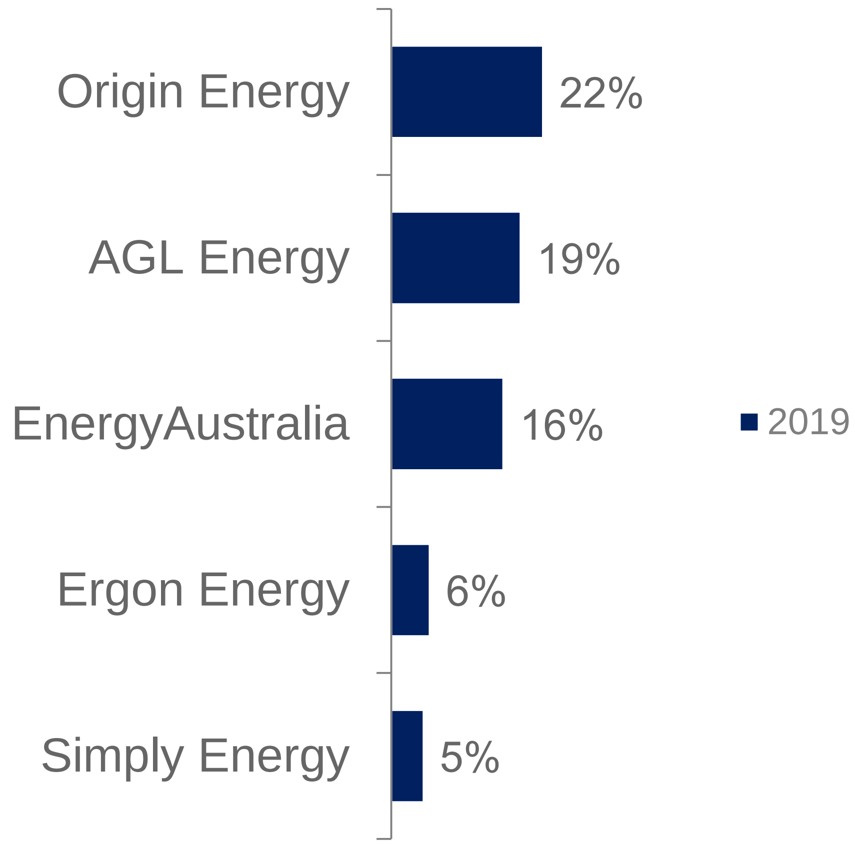


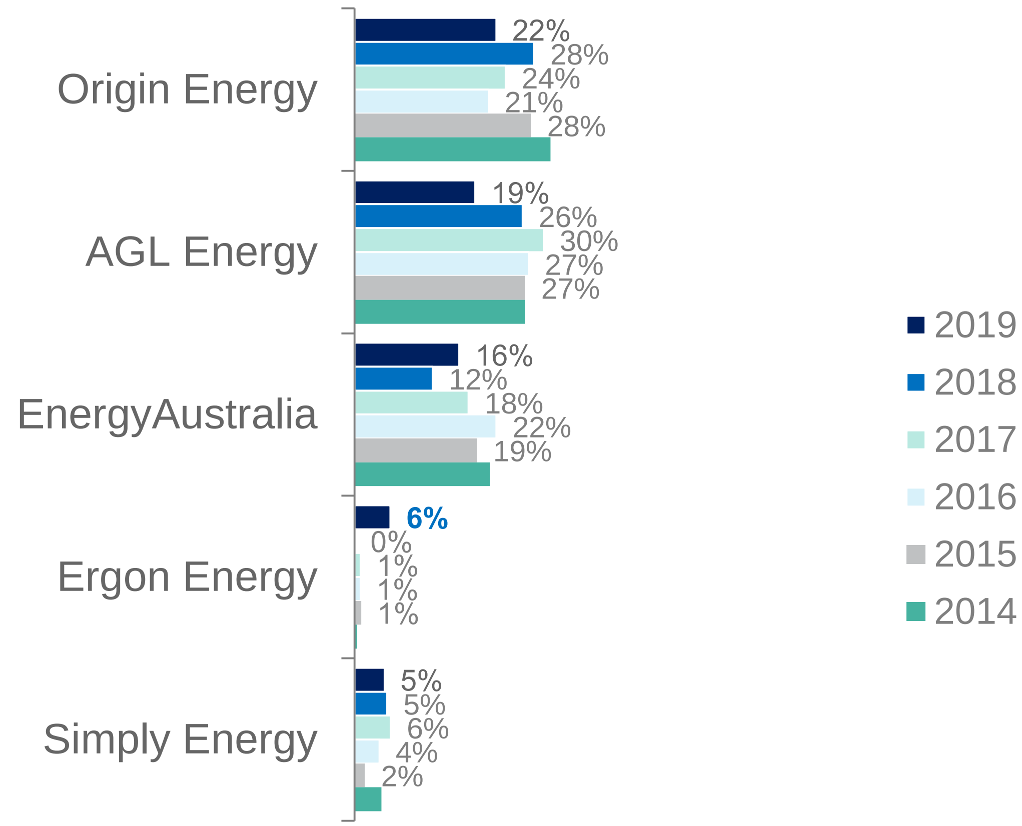
Q51. The last time you switched your business’s energy company, plan or deal, how easy or difficult was it for you to compare the different offers when deciding whether or not to switch?
Base: NEM participants who have switched energy company, plan or deal in the past 5 years: 2015 (n=236); 2016 (n=201); 2017 (n=191); 2018 (n=210); 2019 (n=408).

Current energy contract

Top 5 NEM energy retailers - electricity

- As observed in previous years, the three major energy retailers (Origin Energy, AGL Energy and Energy Australia) continue to be the most commonly used.
- Among the top three, Origin Energy and AGL Energy both recorded having a smaller market share among businesses surveyed in 2019 compared to the 2018 sample.
- Compared to 2018, respondents in 2019 were significantly more likely to mention Ergon Energy (6%, compared to 0% in 2018), Aurora Energy (2%, compared to 0% in 2018); and were significantly less likely to mention ActewAGL (1%, compared to 3% in 2018).
- Demographics that were significantly more likely to use one of the three major energy retailers included: metro businesses, NSW/SEQ/SA businesses, Construction industry.
- Demographics that were significantly more likely to use an energy retailer outside of the major three included: regional businesses, and businesses in the Retail Trade industry.

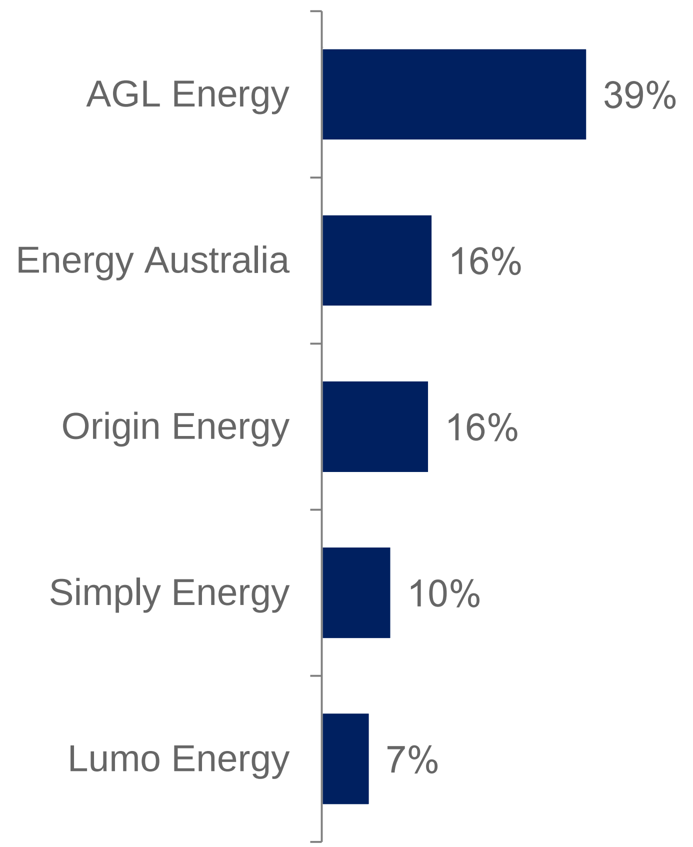


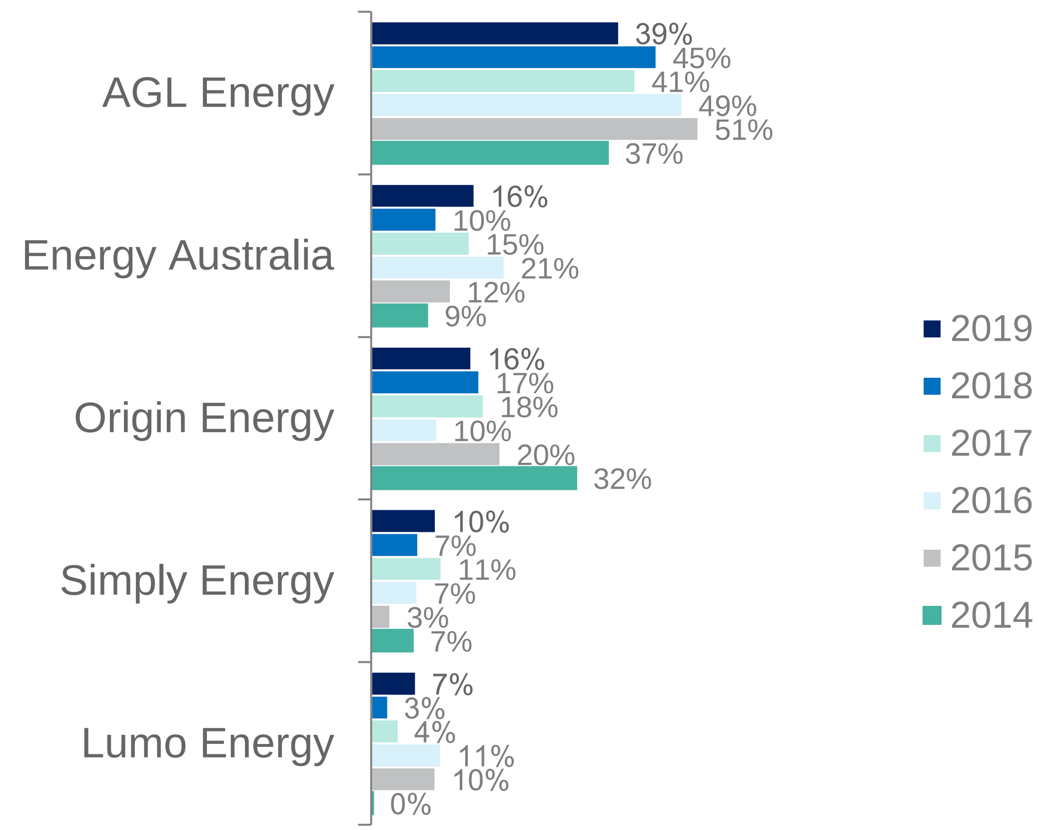


Q1. What is the name of the company that you receive a bill from for your electricity use?
Base: All NEM participants: 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327); 2019 (n=800).

Top 5 ECGM energy retailers - gas

- AGL Energy continues to be the dominant energy retailer for gas usage (39% in 2019), followed by Energy Australia (16%) and Origin Energy (16%).

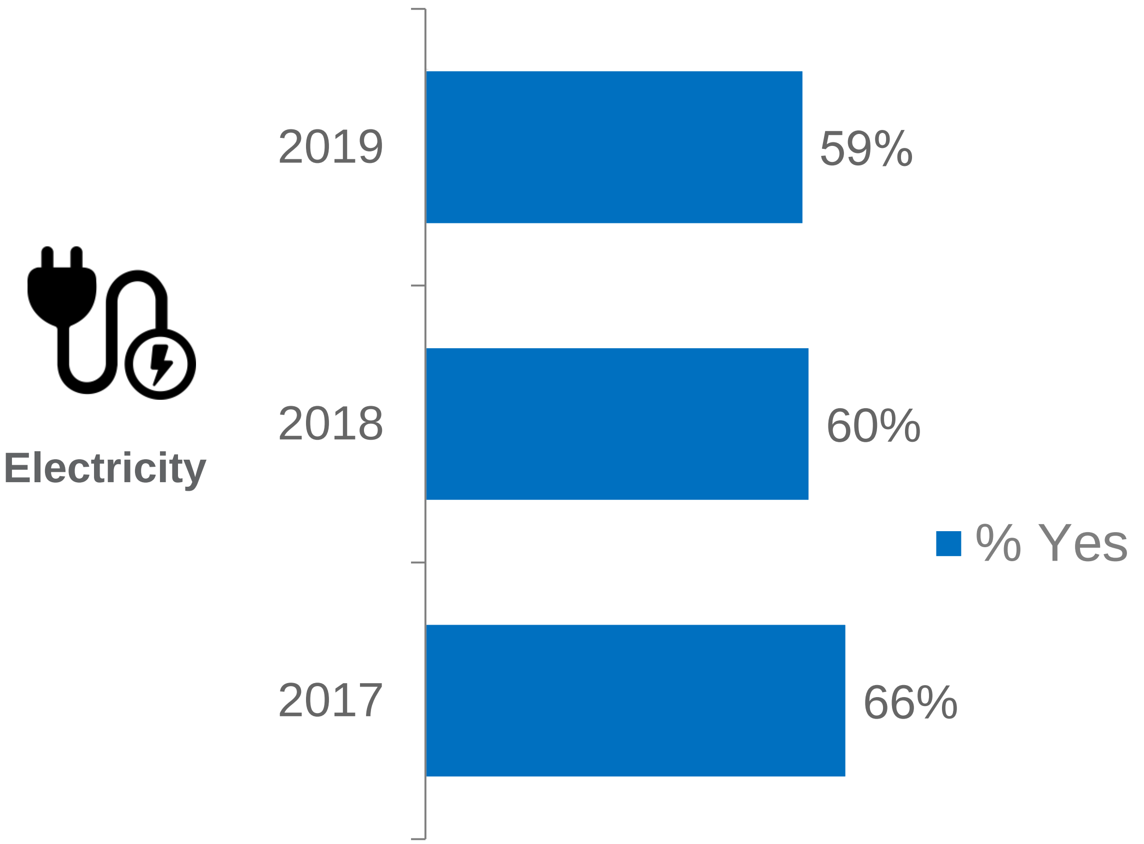


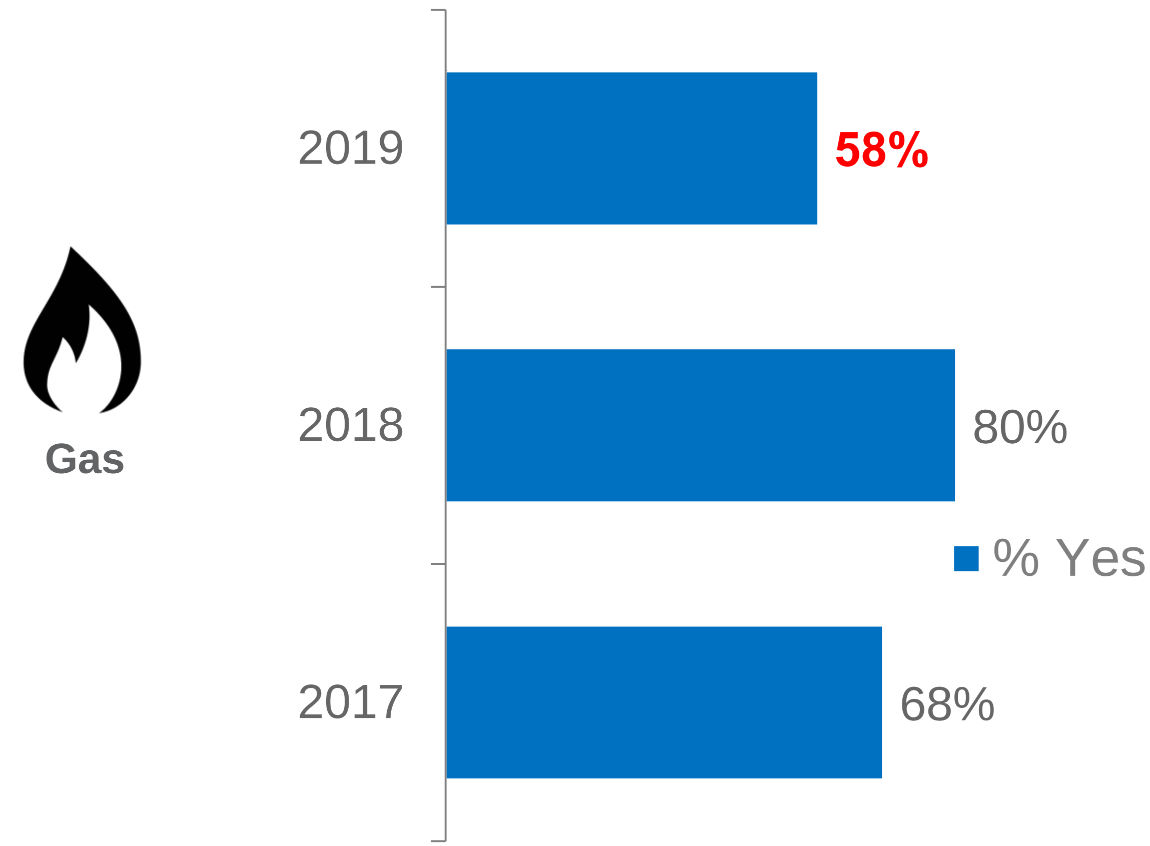


Q6. What is the name of the company you receive a bill from for your mains connected gas use?
Base: ECGM participants: 2014 (n=97); 2015 (n=103); 2016 (n=98); 2017 (n=155); 2018 (n=60); 2019 (n=165).

Rewards or discounts received

- In 2019, 59% of businesses reported that their electricity provider offers rewards or discounts, consistent with the 60% figure observed in 2018.
- Businesses in 2019 were significantly less likely to report that their gas provider offers rewards or discounts (58%, compared to 80% in 2018).
- Demographics that were significantly more likely to report being offered rewards or discounts included: businesses with 1-4 employees, metro businesses, VIC/SEQ/SA businesses, Rental, Hiring and Real Estate Services industry.
- Demographics that were significantly less likely to report being offered rewards or discounts included: businesses with 20-199 employees, regional businesses, ROQ/TAS/ACT businesses, Retail Trade industry, Accommodation and Food Services industry.



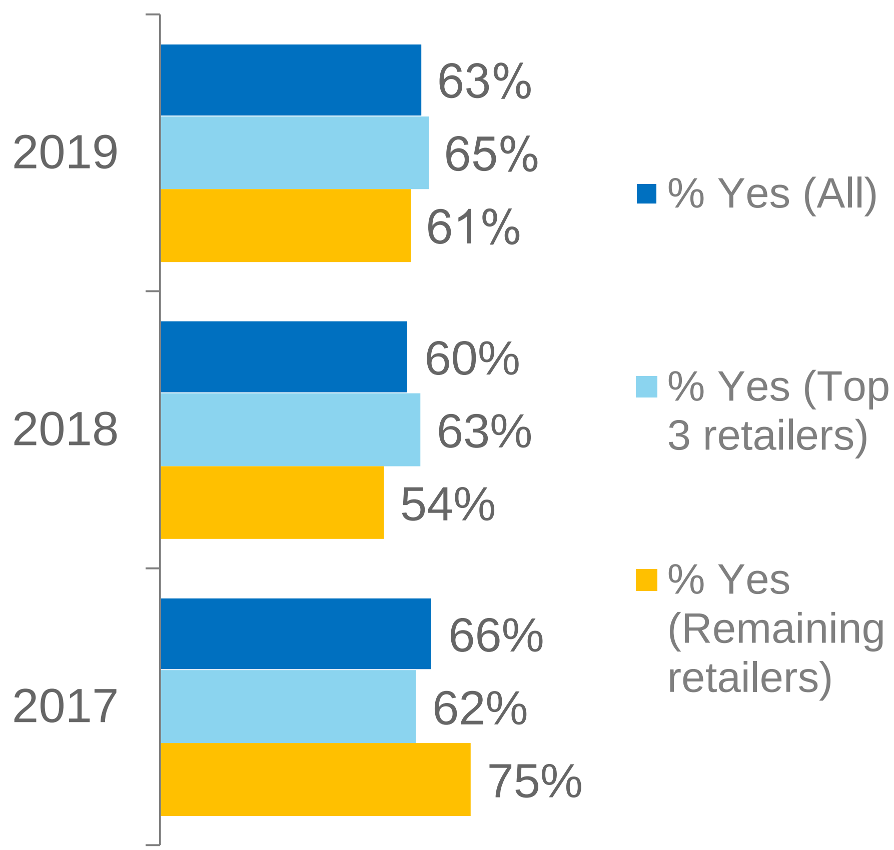


Q70. Does your business' electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit?
Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit?
Base: NEM participants: 2017 (n=432); 2018 (n=327); 2019 (n=800). ECGM participants: 2017 (n=143); 2018 (n=60); 2019 (n=165).

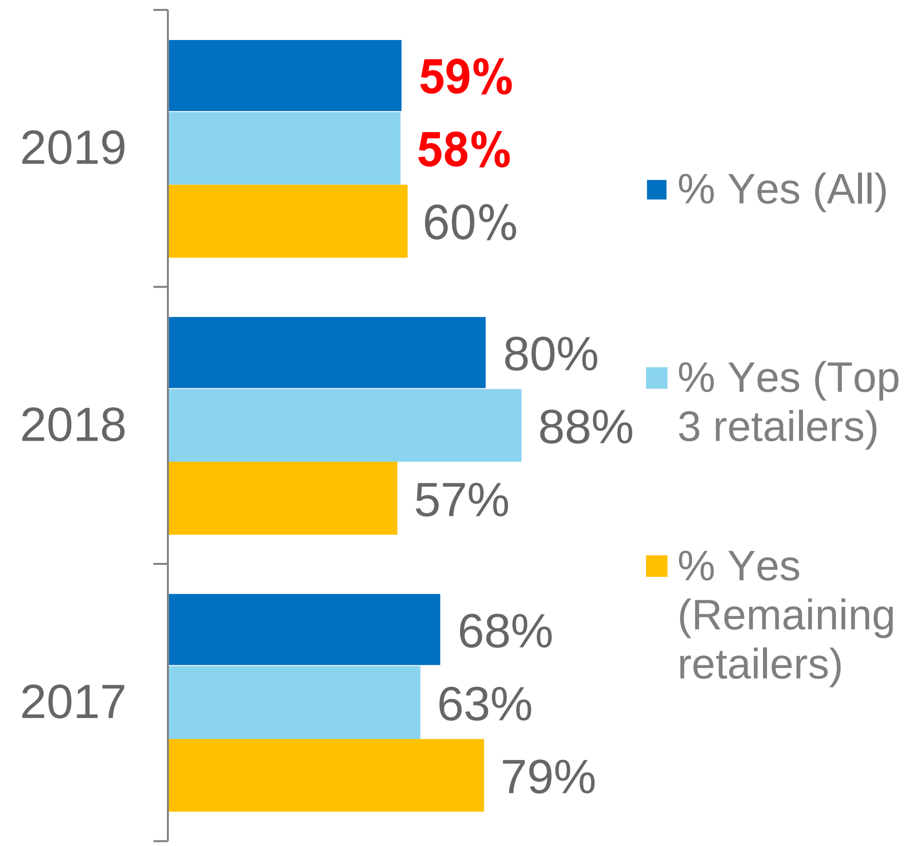
Rewards / discounts received by top 3 retailers

- The top 3 gas retailers (AGL, Origin and Energy Australia) were significantly less likely to offer rewards or discounts to businesses in 2019 (58%, compared to 88% in 2018). However, there was limited change for the remaining businesses who offered rewards or discounts to 60% of businesses in 2019 which was similar to the 57% recorded in 2018.

Electricity



Gas

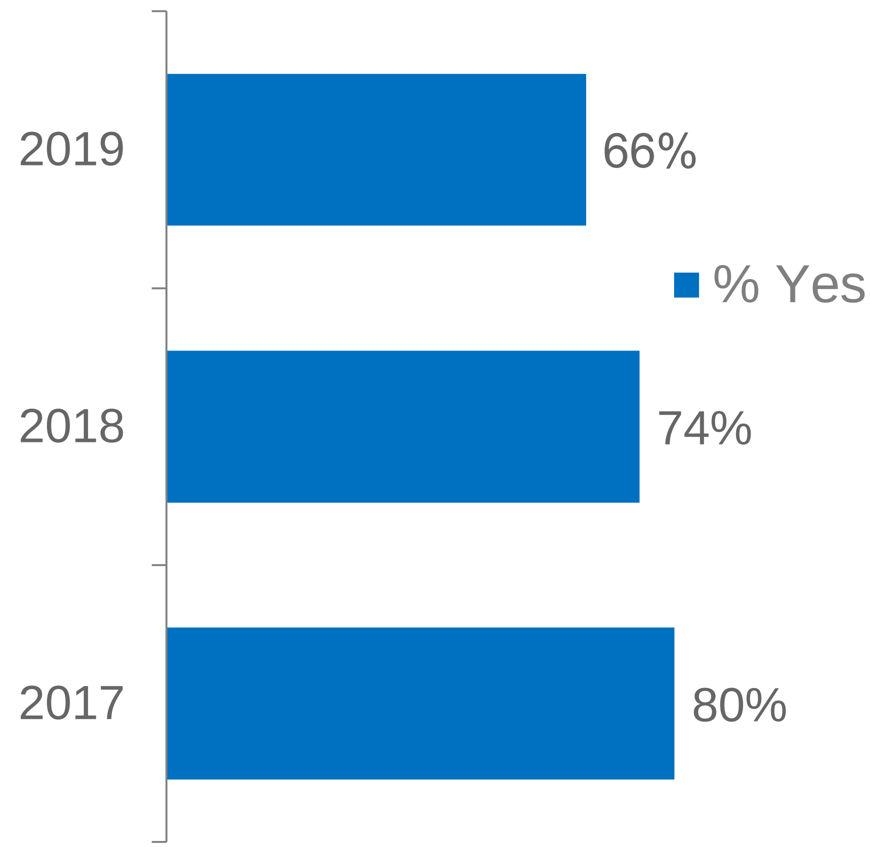


Q70. Does your business' electricity provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? Q76. Does your gas provider give you any specific rewards or discounts if, for example, you pay on time or use direct debit? Base: All NEM participants: 2017 (n=432); 2018 (n=327); 2019 (n=622 excluding Ergon Energy, Aurora Energy and ActewAGL). ECGM participants: 2017 (n=143); 2018 (n=60); 2019 (n=154* excluding Aurora Energy and ActewAGL).

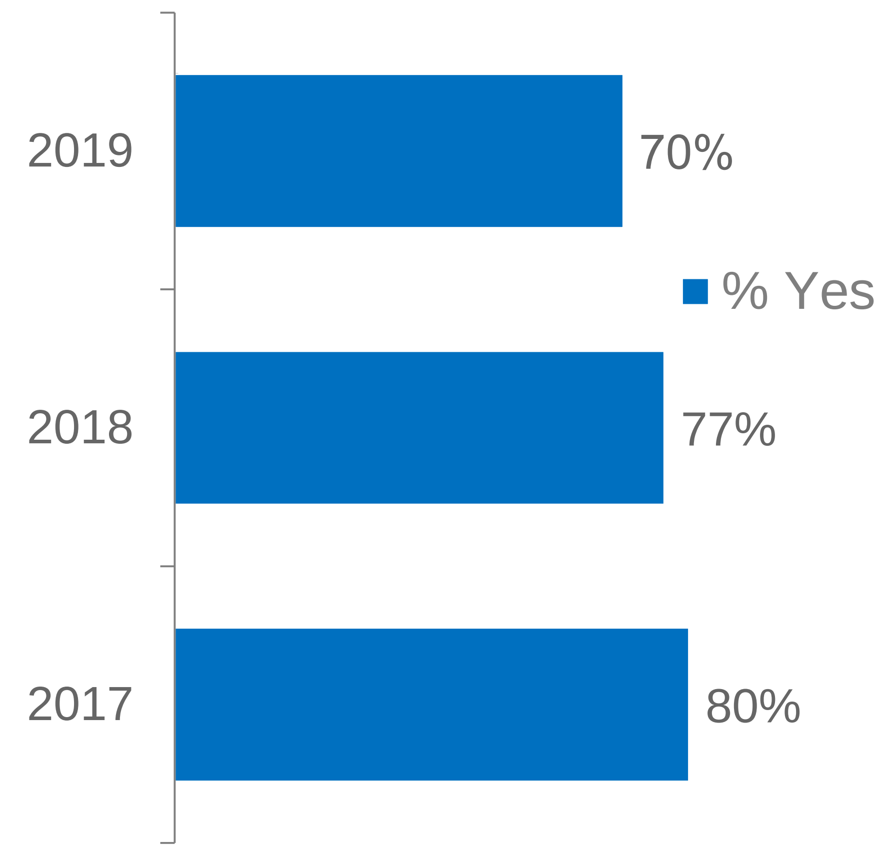
Active choice in current contract

- Two-thirds (66%) of businesses in 2019 had actively chosen to be on their electricity contract or plan, and 70% of those with gas had actively chosen their gas contract or plan.
- Demographics that were significantly more likely to actively choose their particular contract or plan included: metro businesses, NSW/VIC/SA businesses, Rental, Hiring and Real Estate Services industry.
- Demographics that were significantly less likely to actively choose their particular contract or plan included regional businesses and ROQ/TAS businesses.

Electricity



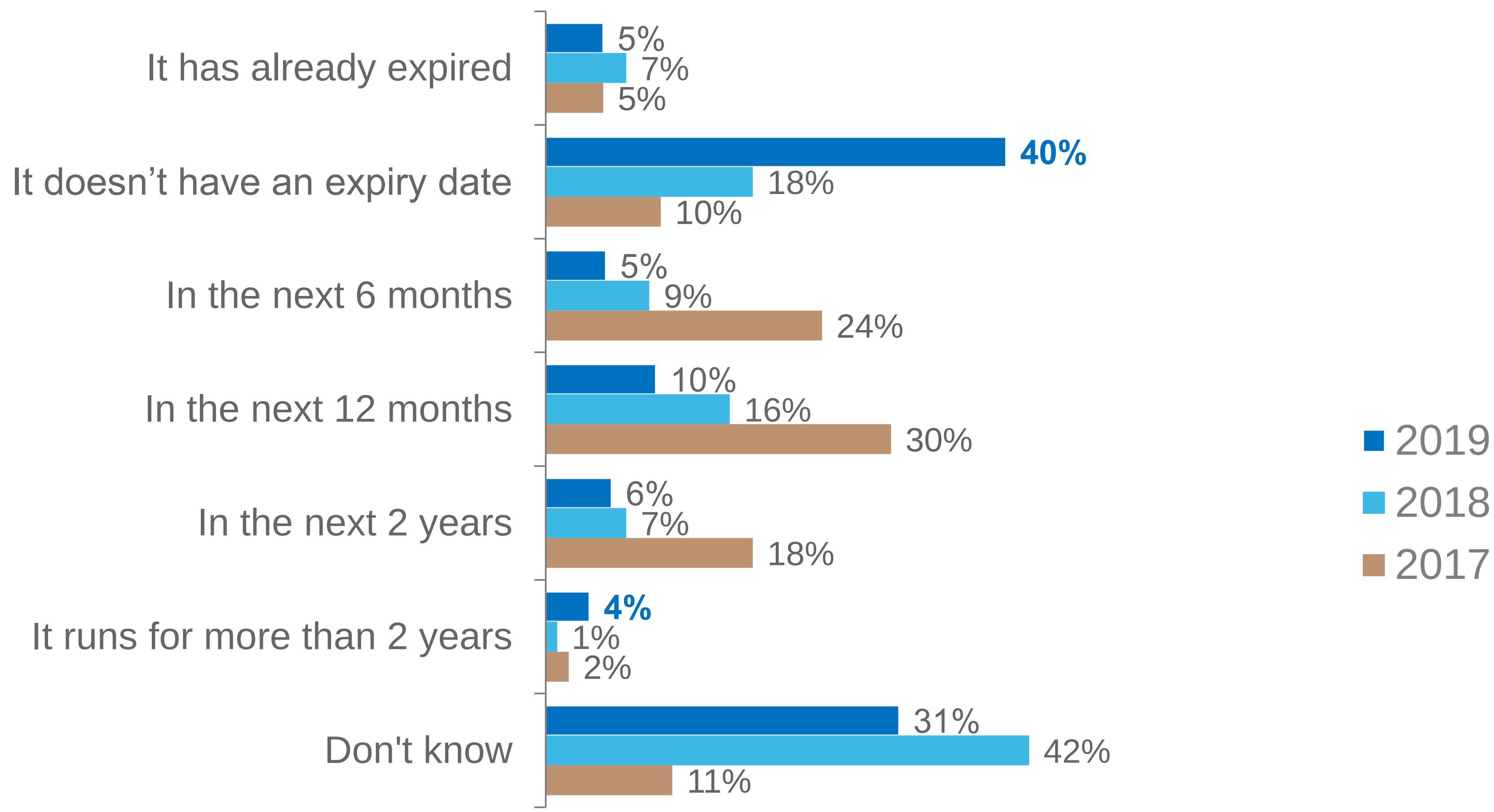
Gas



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); 2019 (n=800). 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); 2019 (n=165).

Expiration of electricity contract

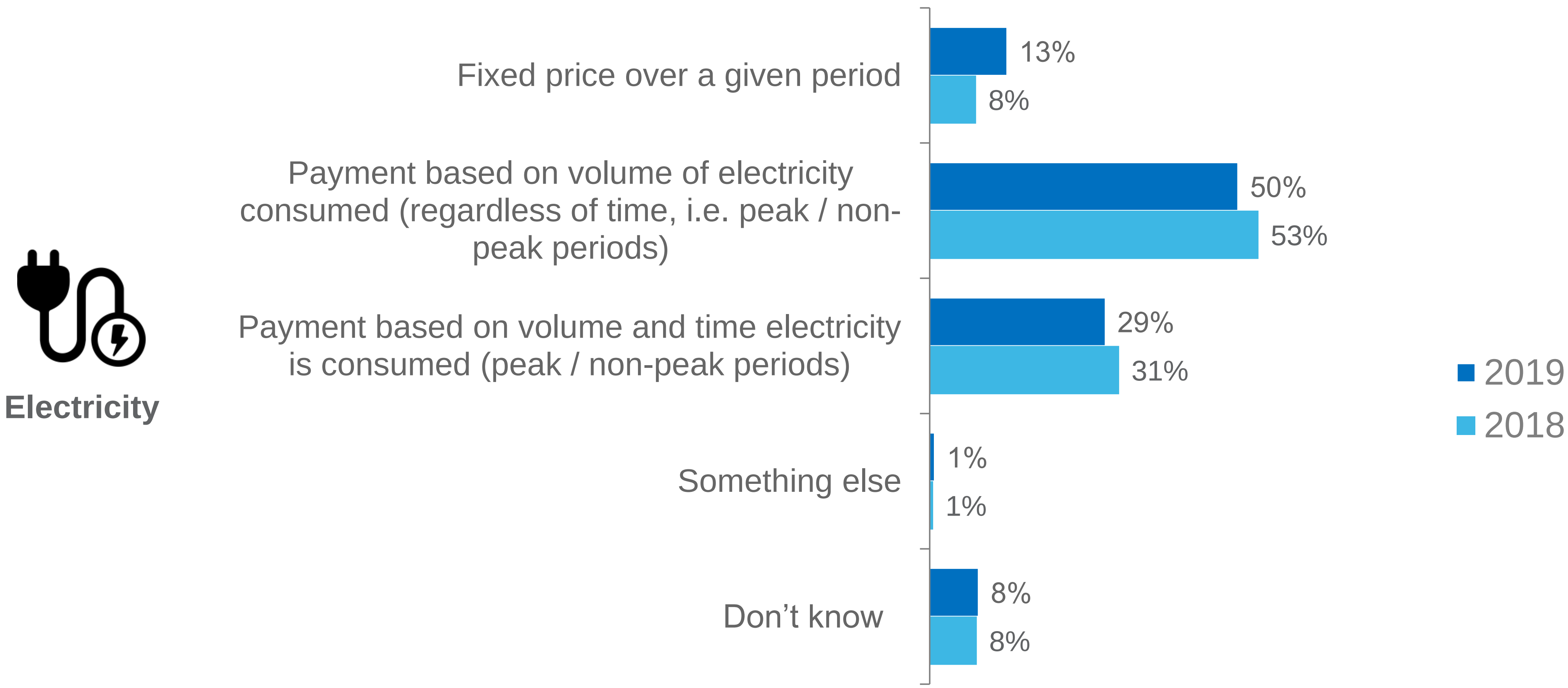
- A large proportion (40%) of businesses in 2019 reported that their electricity contract does not have an expiry date, significantly lower than the 18% observed for this response in 2018.
    - SA businesses in 2019 were significantly less likely to indicate their electricity contract does not have an expiry date.
- There remains a high proportion (31%) who do not know when their electricity contract expires.



Q65. Do you know if or when your electricity contract or plan expires?
Base: All NEM participants: 2017 (n=199); 2018 (n=327); 2019 (n=622 excluding Ergon Energy, Aurora Energy and ActewAGL)

Electricity billing arrangement

- Half (50%) of businesses in 2019 reported that their electricity bill is based on the volume of electricity consumed, and a further 29% indicated that their payment is based on a combination of volume and time (29%).

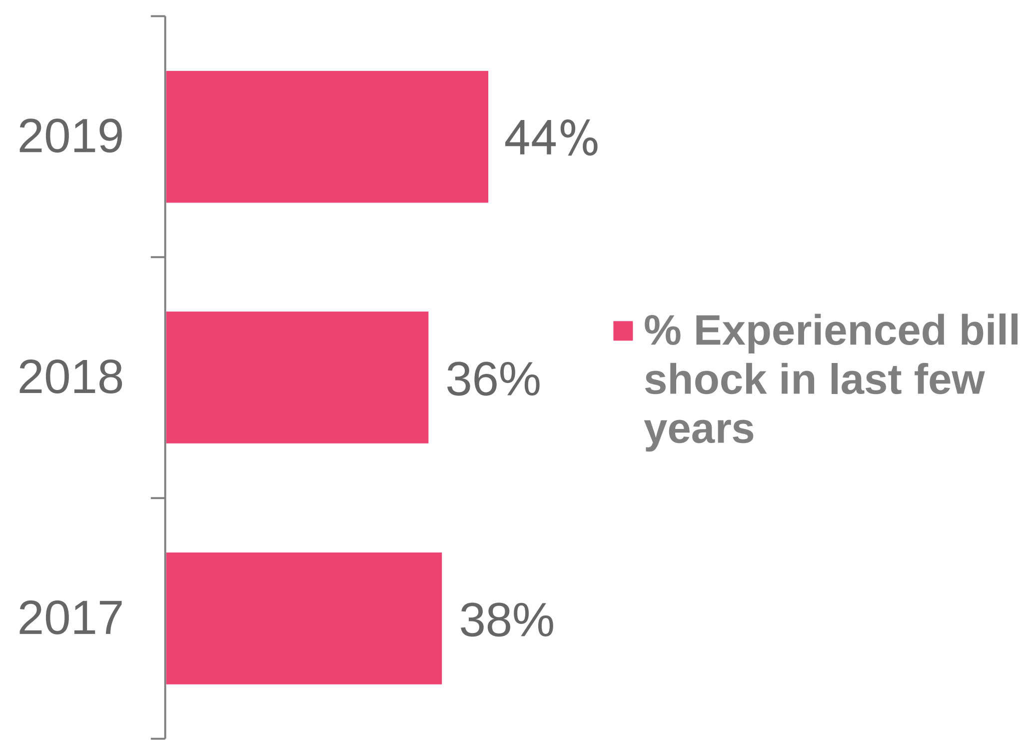


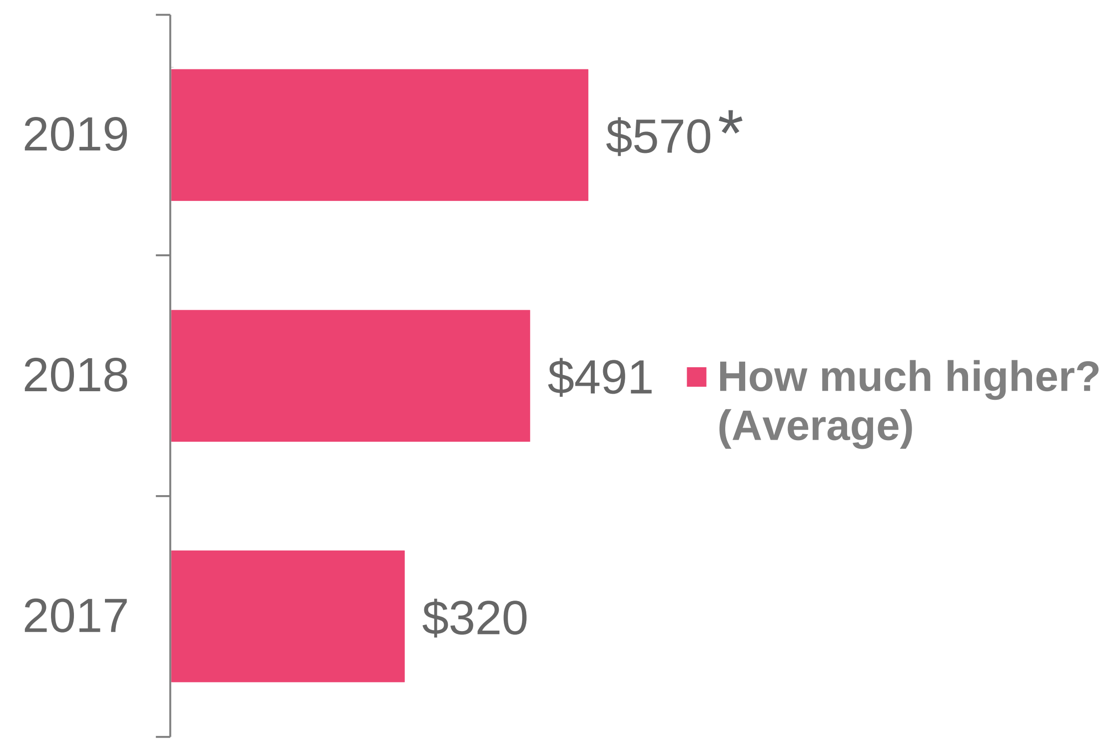
Note: This question was added in 2018.
Q66a. Businesses can often choose to be charged a fixed price for their electricity over a given period; or be charged based on the volume of electricity consumed (and/or the time the electricity is consumed). Which of the following best describes your current billing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

Bill shock and responses

Bill shock

- A higher proportion (44%) of businesses in 2019 experienced bill shock, compared to 36% in 2018 and 38% in 2017.
  - Across demographics, businesses with 20-199 were significantly less likely to experience bill shock, whereas those in the Construction industry were significantly more likely.
- When asked to specify how much higher this dollar amount was from their normal bills, the average amount was $570; this continues an upward pattern beginning from an average of $320 in 2017, and an average of $491 in 2018.
  - Demographics that recorded a significantly higher average amount included businesses with 20-199 employees, regional businesses, and ROQ businesses.
  - Conversely, demographics that recorded a significantly lower average amount included non-employing businesses, metro businesses, SEQ/ACT businesses, and those in the Construction industry.





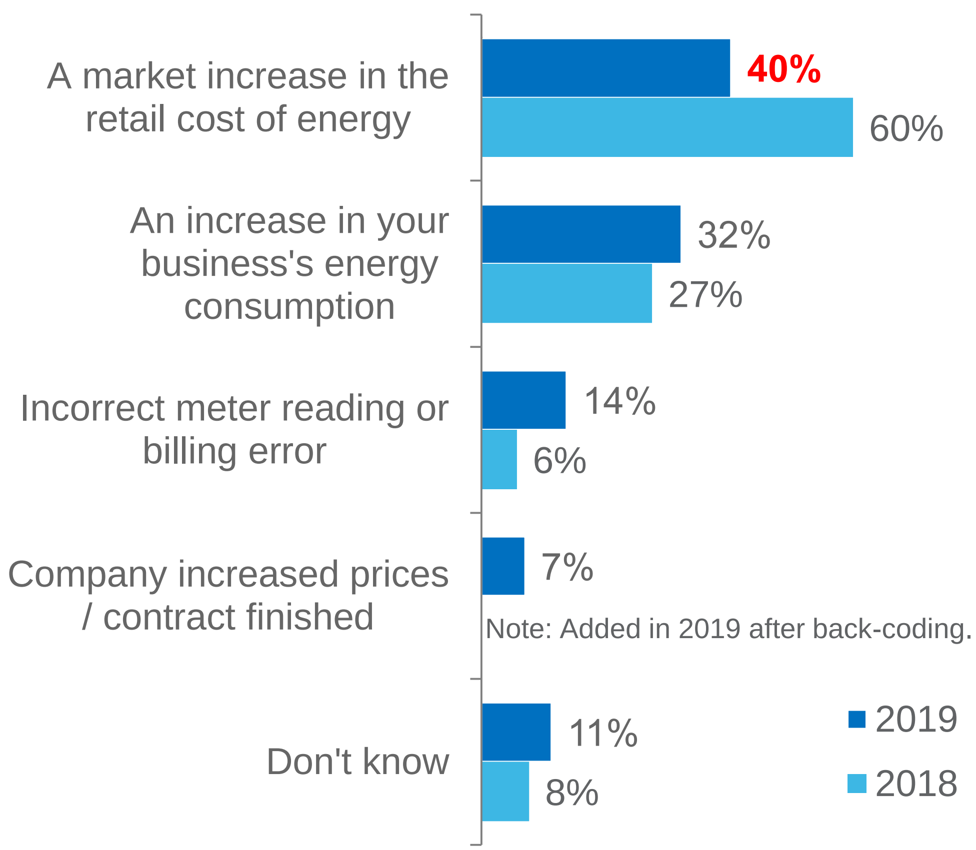
*Note: Based on the highest value from 2018 being $7000 (higher than normal bill), any cases above $7000 in 2019 were treated as outliers to facilitate a more accurate comparison. In total, n=7 cases from the 2019 data were treated as outliers and were removed before calculating this average figure.

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); 2019 (n=800). NEM participants who have experienced higher than normal bill shock : 2017 (n=172); 2018 (n=115); 2019 (n=273*, note n=7 cases removed from original n=280).

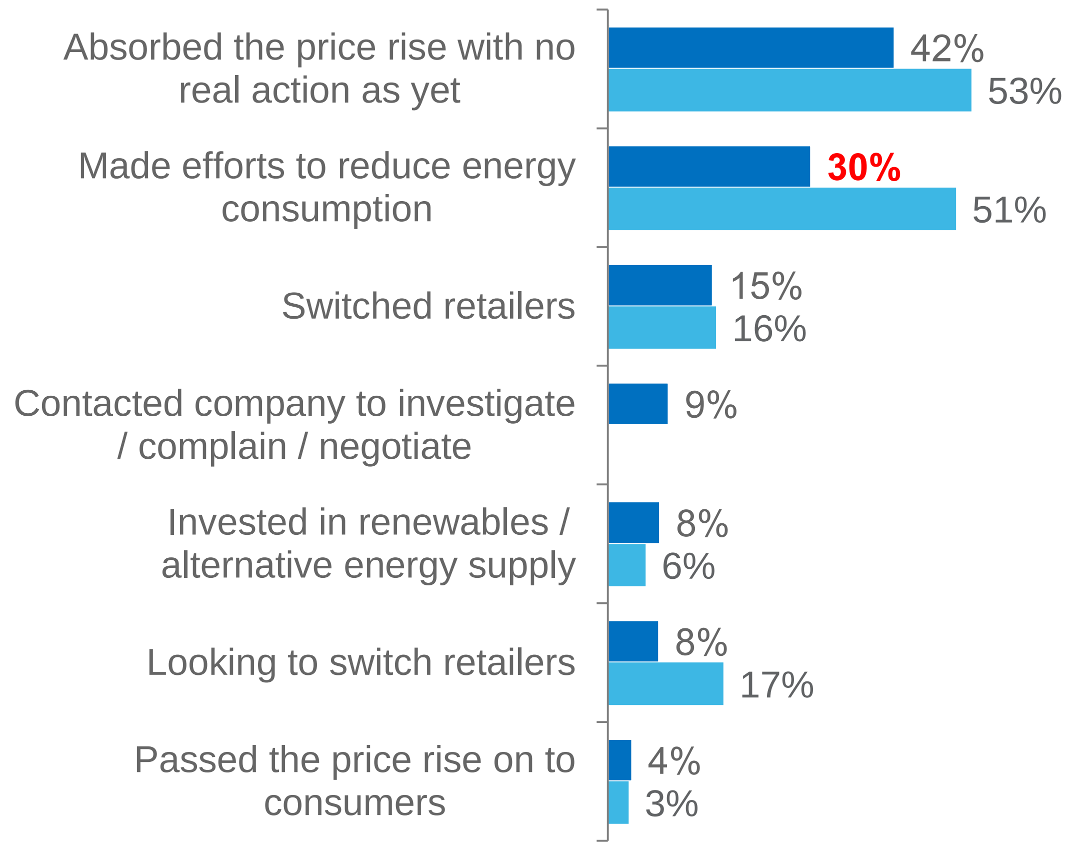
Reasons for bill increase and business responses

- Respondents in 2019 were significantly less likely to indicate 'a market increase in the retail cost of energy' as a reason for their bill increase (40%), compared to those in 2018 (60%).
- In terms of actions taken in response to the surprising bill increase, respondents in 2019 were significantly less likely to have 'made efforts to reduce energy consumption' (30%) compared to those in 2018 (51%).
- VIC businesses and regional businesses were significantly more likely to passed the price rise onto consumers in response to their bill increase, whereas metro businesses were significantly less likely to do this.
- Businesses in the Rental, Hiring and Real Estate Services industry were significantly more likely to switch retailers as a result of the bill increase.
- Businesses with solar panels were significantly more likely to respond to a bill increase by investing in renewables or an alternative energy supply.

Reasons for bill increases



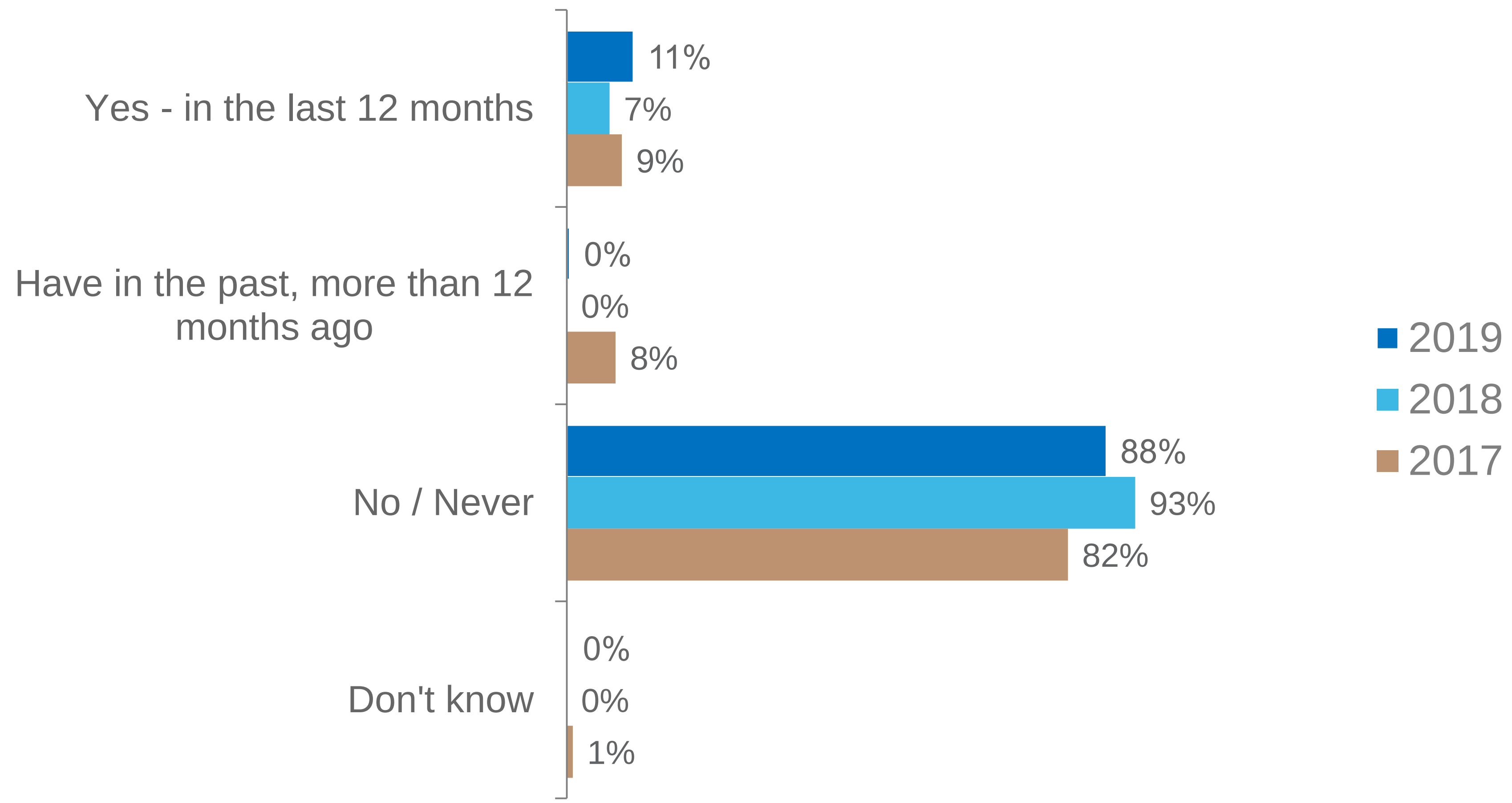
Business responses to bill increases



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 that was higher in the last few years: 2018 (n=111); 2019 (n=293).

Financial difficulty in last 12 months

- Consistent with previous results, the majority of businesses have not experienced financial difficulty in paying energy bills over the past 12 months (88% in 2019).
- Nonetheless, around one in ten businesses in 2019 did report experiencing financial difficulty (11%), representing a slight increase from 7% in 2018.
- Demographics that were significantly more likely to experience financial difficulty in the last 12 months included: regional businesses (metro businesses were significantly less likely) and ROQ businesses.



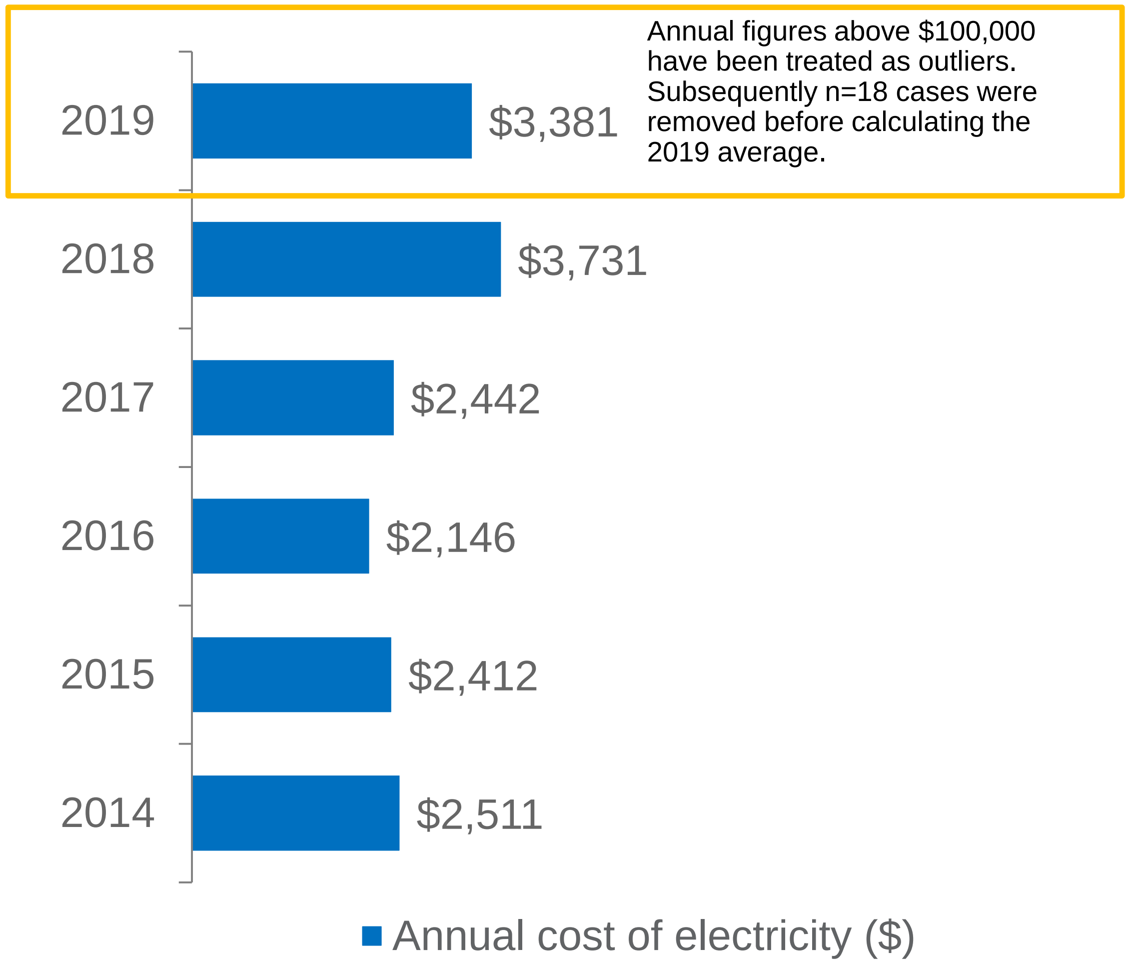
D29. In the last 12 months has your business experienced any financial difficulty in paying energy bills?
Base: All NEM participants: 2017 (n=450); 2018 (n=327); 2019 (n=800).

Savings required to consider switching

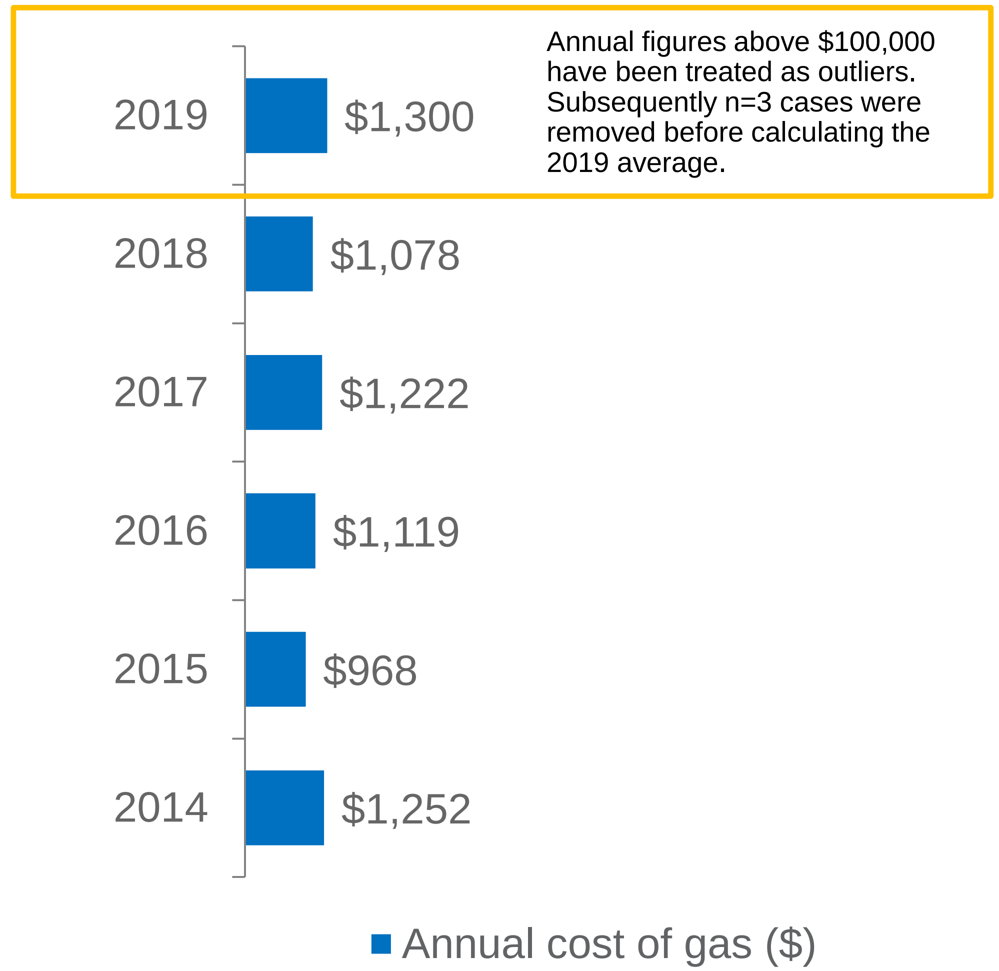
Annual energy costs

- The average annual cost of electricity for all businesses in 2019 was $5,004 – however this figure may be skewed by n=18 businesses providing a six-figure annual cost (compared to 2018 data where no six-figure annual costs were recorded), and so when these businesses are excluded, the annual cost of electricity in 2019, as outlined in the chart below, is $3,381 (similar to the 2018 average).
- The average annual cost of gas for businesses in 2019 was $1,300, representing an increase from $1,078 on average for businesses in 2018.
    - Businesses with 20-199 employees have significantly higher average annual electricity costs
    - Non-employing businesses, businesses with 1-4 employees, Professional, Scientific and Technical Services industry, Financial and Insurance Services industry, have significantly lower average annual electricity costs.

Electricity



Gas

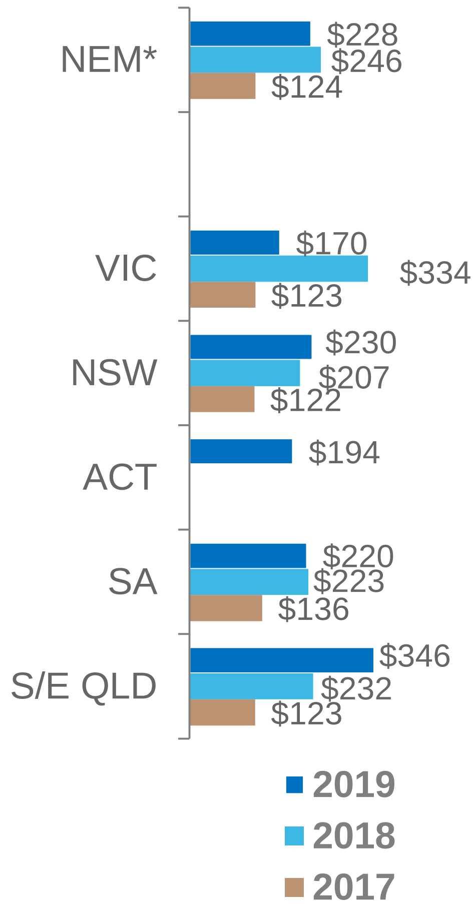


D3. How much was your business' most recent electricity bill? D3a. How often does your business receive your electricity bill? D4. How much was your business's most recent gas bill? D4a. How often does your business receive your gas bill?
Base: NEM participants in 2014 (n=366); 2015 (n=450); 2016 (n=452); 2017 (n=450); 2018 (n=327); 2019 (n=697)
ECGM participants in 2014 (n=123); 2015 (n=124); 2016 (n=106); 2017 (n=156); 2018 (n=50); 2019 (n=140)
For 2019 n=18 cases removed for electricity & n=3 cases removed for gas (annual figures above $100,000 treated as outliers)

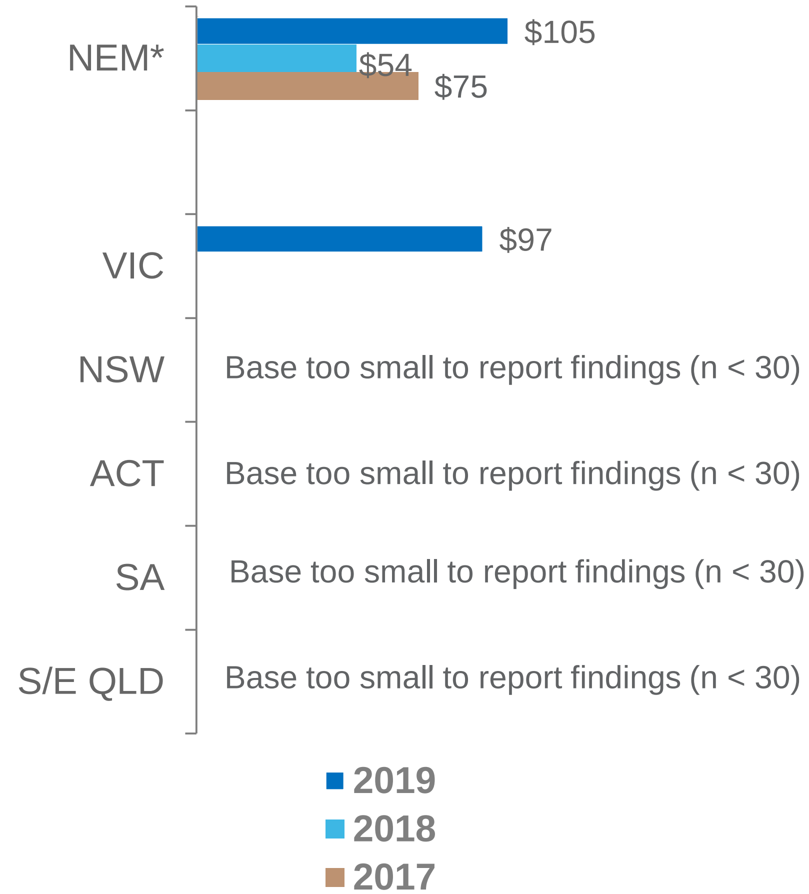
Average quarterly savings required to consider switching

- The average quarterly amount of savings which would be needed to consider switching in 2019 decreased for electricity and increased for gas:
  - for electricity, $228 in savings per quarter would be required (down from $246 per quarter in 2018); and
  - for gas, $105 in savings per quarter would be required (up from $54 per quarter in 2018).
- Those in the electricity, gas, water and waste services, retail trade, administrative and support services and education and training industries recorded significantly lower average quarterly savings amounts for electricity.

Electricity



Gas



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 participants in NSW/VIC/ACT/SA/SEQ – excluding those who have experienced bill shock: 2017 (n=212); 2018 (n=206); 2019 (n=388).
All gas participants in NSW/VIC/ACT/SA/SEQ – excluding those who have experienced bill shock: 2017 ECGM (n=69); 2018 (n=36); 2019 (n=80).
For 2019 n=2 cases removed for electricity & n=1 cases removed for gas (annual figures above $100,000 treated as outliers)

Adoption of new technologies

Use / uptake of solar panels

- One-third (33%) of businesses in 2019 already have solar panels, with this figure significantly higher than the 18% observed in 2018. Among those businesses that already have solar panels, the majority (88%) own it outright.
- There was also a significant decrease in the proportion who answered they definitely won't take up solar panels (30%, compared to 51% in 2018).
- Regional businesses, and those in the Agriculture, Forestry and Fishing industry were significantly more likely to indicate they already have solar panels.
- Metro businesses and those in the Financial and Insurance Services industry were significantly more likely to indicate they definitely won't get solar panels.

	2019	2018	2017
Already have	**33%**	18%	19%
Definitely will	7%	3%	5%
Probably will	9%	7%	13%
Might	11%	10%	22%
Probably won't	11%	12%	19%
Definitely won't	**30%**	51%	22%

Already have solar panels	2019 (n=245)	2018 (n=61)	2017 (n=97)
Own it outright	88%	93%	90%
Own it with a loan purchase	2%	3%	7%
Lease it	4%	4%	1%
Something else	4%	1%	0%
Don't know	**2%**	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); 2019 (n=800).

Use / uptake of solar hot water systems

- Almost half (47%) of businesses in 2019 indicated that they definitely won't take up solar hot water systems. Although this is a sizeable proportion, it also represents a significant decrease from 62% who provided this response in 2018.
- Regional businesses, and those in the Agriculture, Forestry and Fishing industry were significantly more likely to indicate they already have solar hot water systems.
- Metro businesses were significantly more likely to indicate they definitely won't get a solar hot water system.

	2019	2018	2017
Already have	14%	11%	9%
Definitely will	2%	2%	7%
Probably will	5%	3%	10%
Might	**9%**	3%	23%
Probably won't	23%	18%	27%
Definitely won't	**47%**	62%	25%

Already have solar hot water systems	2019 (n=86)	2018 (n=20)	2017 (n=44)
Own it outright	91%	-	91%
Own it with a loan purchase	1%	-	2%
Lease it	6%	-	1%
Something else	1%	-	0%
Don't know	1%	-	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); 2019 (n=800).

Use / uptake of batteries for storing electricity

- There is greater openness to using batteries for storing electricity, with the proportion of businesses who indicated they definitely won't use this equipment decreasing significantly from 56% in 2018 to 39% in 2019.
- Further to this, 18% of businesses in 2019 indicated they might use this equipment (a significant increase from 7% in 2018), and 3% reported already having this equipment (a significant increase from 0% in 2018).
- Those with solar panels were significantly more likely to already have batteries for storing electricity.

	2019	2018	2017
Already have	**3%**	0%	1%
Definitely will	6%	3%	5%
Probably will	13%	17%	17%
Might	**18%**	7%	27%
Probably won't	21%	18%	28%
Definitely won't	**39%**	56%	23%

Already have batteries for storing electricity	2019 (n=18)	2018 (n=4)	2017 (n=6)
Own it outright	94%	-	-
Own it with a loan purchase	0%	-	-
Lease it	0%	-	-
Something else	6%	-	-
Don't know	0%	-	-

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); 2019 (n=800).

Use / uptake of electric vehicles

- Over half (58%) of businesses in 2019 remain closed to using electric vehicles by answering 'definitely won't'.
- Although just 3% of businesses in 2019 definitely will use electric vehicles, this was significantly higher than the 1% who provided this response in 2018.

	2019	2018	2017
Already have	1%	1%	1%
Definitely will	**3%**	1%	2%
Probably will	5%	2%	7%
Might	12%	8%	21%
Probably won't	21%	20%	33%
Definitely won't	58%	67%	36%

Already have uptake of electric vehicles	2019 (n=13)	2018 (n=8)	2017 (n=6)
Own it outright	89%	-	-
Own it with a loan purchase	9%	-	-
Lease it	1%	-	-
Something else	0%	-	-
Don't know	0%	-	-

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); 2019 (n=800).

Use / uptake of smart meters

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

- One in four (25%) businesses in 2019 indicated they definitely won't use smart meters, representing a slight decrease from 32% in 2018.
- There was a significant decrease in the proportion of businesses who answered they might use smart meters (9% in 2019, compared to 18% in 2018).
- VIC businesses were significantly more likely to indicate they already have a smart meter (56%), whereas SA businesses were significantly less likely to provide this response (14%).
- Those with solar panels were significantly more likely to already have a smart meter.

	2019	2018	2017
Already have	38%	28%	31%
Definitely will	2%	3%	4%
Probably will	10%	7%	10%
Might	**9%**	18%	25%
Probably won't	17%	12%	16%
Definitely won't	25%	32%	15%

Already have smart meters	2019 (n=207)	2018 (n=67)	2017 (n=104)
Own it outright	46%	35%	40%
Own it with a loan purchase	3%	0%	4%
Lease it	12%	19%	11%
Something else	16%	7%	9%
Don't know	23%	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), 2019 (n=800).

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

- Just under half (47%) of businesses in 2019 indicated they definitely won't use energy management systems, and a further 29% probably won't.
- Businesses with 20-199 employees, and businesses with solar panels, were significantly more likely to indicate they already have an energy management system.

	2019	2018	2017
Already have	6%	6%	4%
Definitely will	1%	3%	3%
Probably will	8%	4%	9%
Might	9%	6%	27%
Probably won't	29%	25%	36%
Definitely won't	47%	57%	21%

Already have energy management systems	2019 (n=48)	2018 (n=16)	2017 (n=16)
Own it outright	82%	-	-
Own it with a loan purchase	0%	-	-
Lease it	1%	-	-
Something else	10%	-	-
Don't know	6%	-	-

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); 2019 (n=800).

Use / uptake of apps to remotely control appliances

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

- Around three-quarters of businesses in 2019 are closed to the idea of apps to remotely control appliances, with 51% indicating they definitely won't and a further 24% indicating they probably won't.
- Nonetheless, businesses in 2019 were significantly more likely to answer that they definitely will use apps to remotely control appliances (4%, compared to 1% in 2018).

	2019	2018	2017
Already have	4%	1%	2%
Definitely will	**4%**	1%	2%
Probably will	8%	9%	12%
Might	9%	7%	24%
Probably won't	24%	20%	35%
Definitely won't	51%	61%	25%

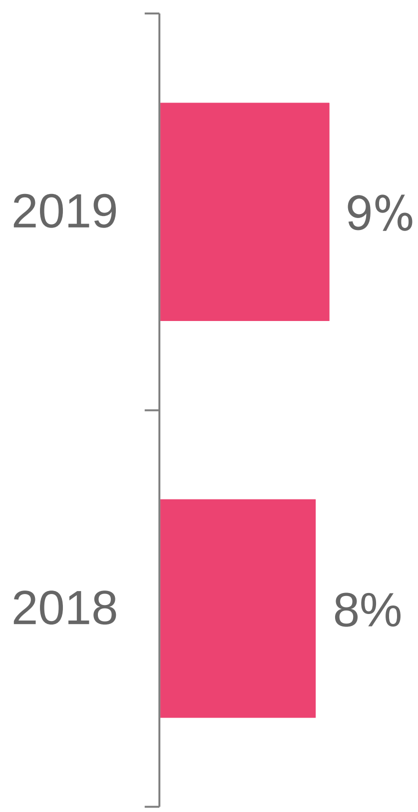
D5e. For each of the following things, please tell me whether your business has them, and if not, how likely you think it is that you will have them within the next two years.
Base: All NEM participants: 2017 (n=450); 2018 (n=327); 2019 (n=800).

Language barriers

Language barriers

- Around one in ten (9%) of business operators speak a language other than English at home.
  - Metro business operators were significantly more likely to speak a language other than English at home, whereas regional business operators were significantly less likely to.
- From this audience, very few had experienced any language barriers; just 1% indicated that language was a barrier in considering an alternate energy company, plan or contract (significantly lower than the 12% observed in 2018).

■ Speak a language other than English at home



Experienced language barriers in terms of…

% Yes	2018 (n=33)	2019 (n=54)
Understanding your energy bill	5%	2%
Considering an alternative energy company, plan or contract	12%	**1%**
Considering investing in energy management or generation technology	0%	1%

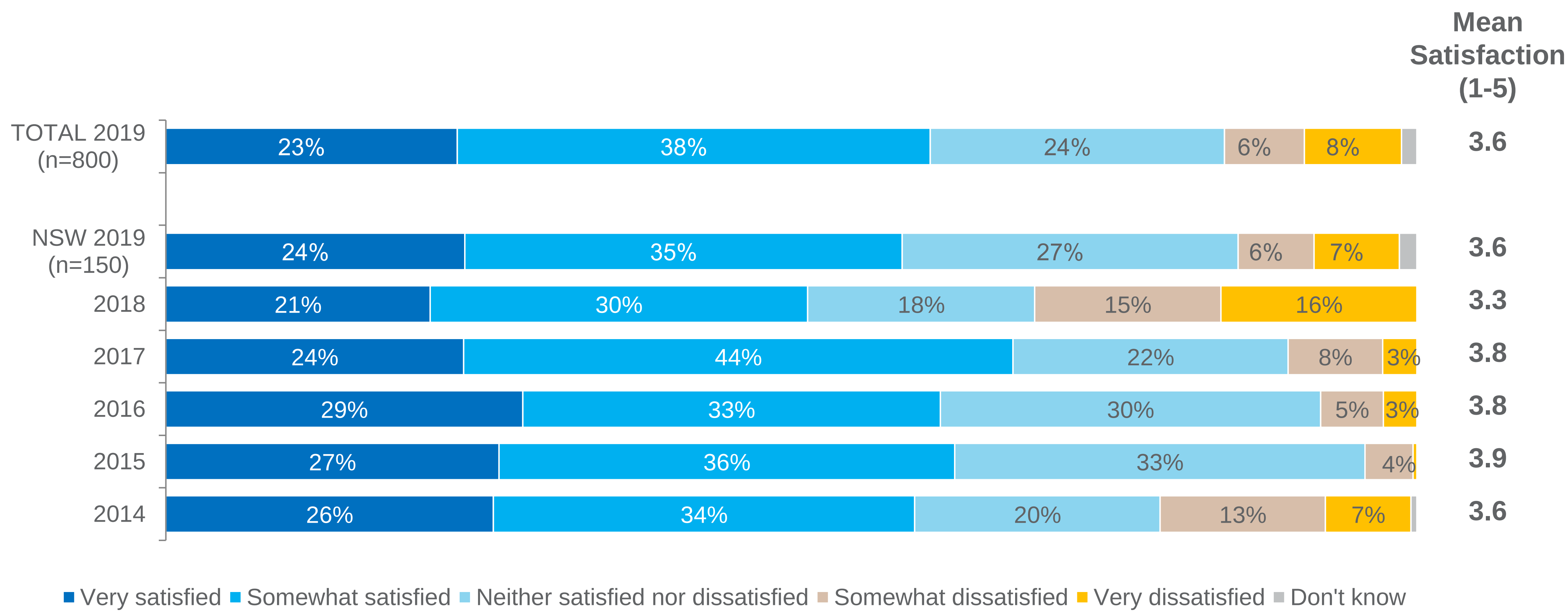
D31. Do you speak a language other than English at home? D33. Have you experienced any language barriers that have negatively impacted on your ability to…
Base: All NEM participants; 2018 (n=327); 2019 (n=800). NEM participants who speak a language other than English at home; 2018 (n=33); 2019 (n=54).

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

New South Wales

Overall satisfaction with current electricity provider

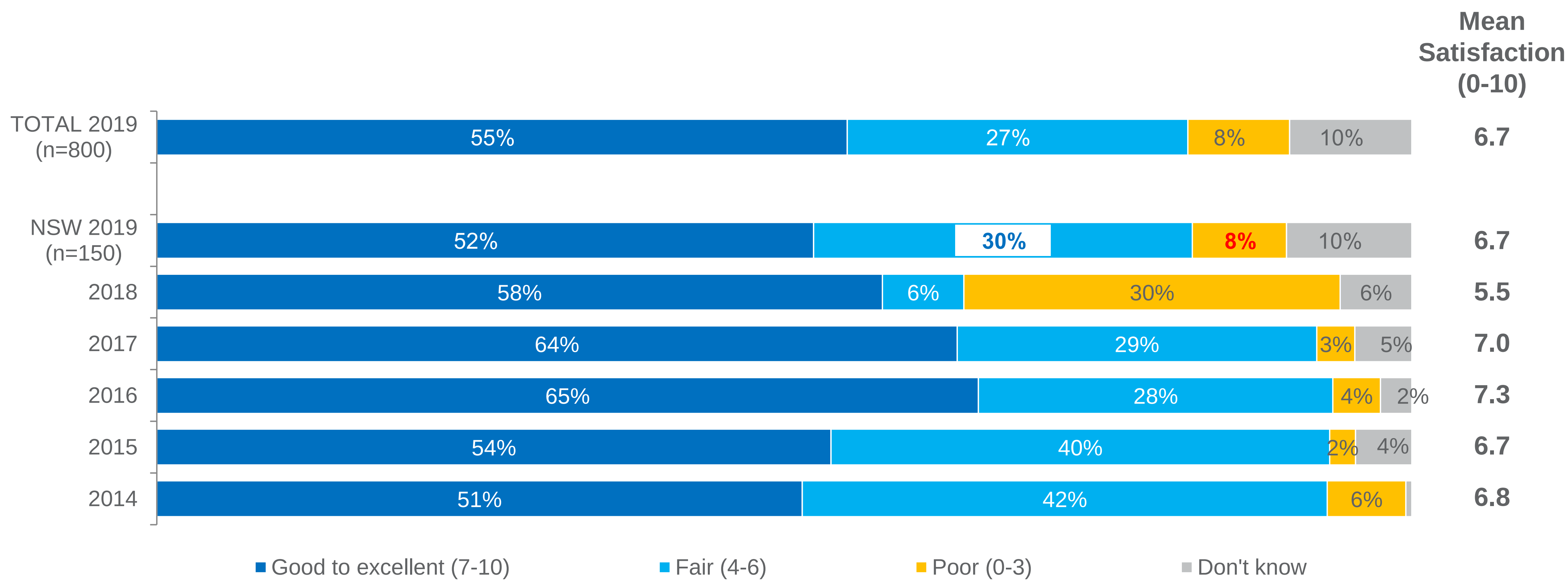
- NSW businesses in 2019 recorded a higher mean satisfaction with their current electricity provider compared to NSW businesses in 2018 (3.3 in 2018, compared to 3.6 in 2019), however this was not a statistically significant difference.



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 respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150)

Satisfaction with customer service among electricity providers

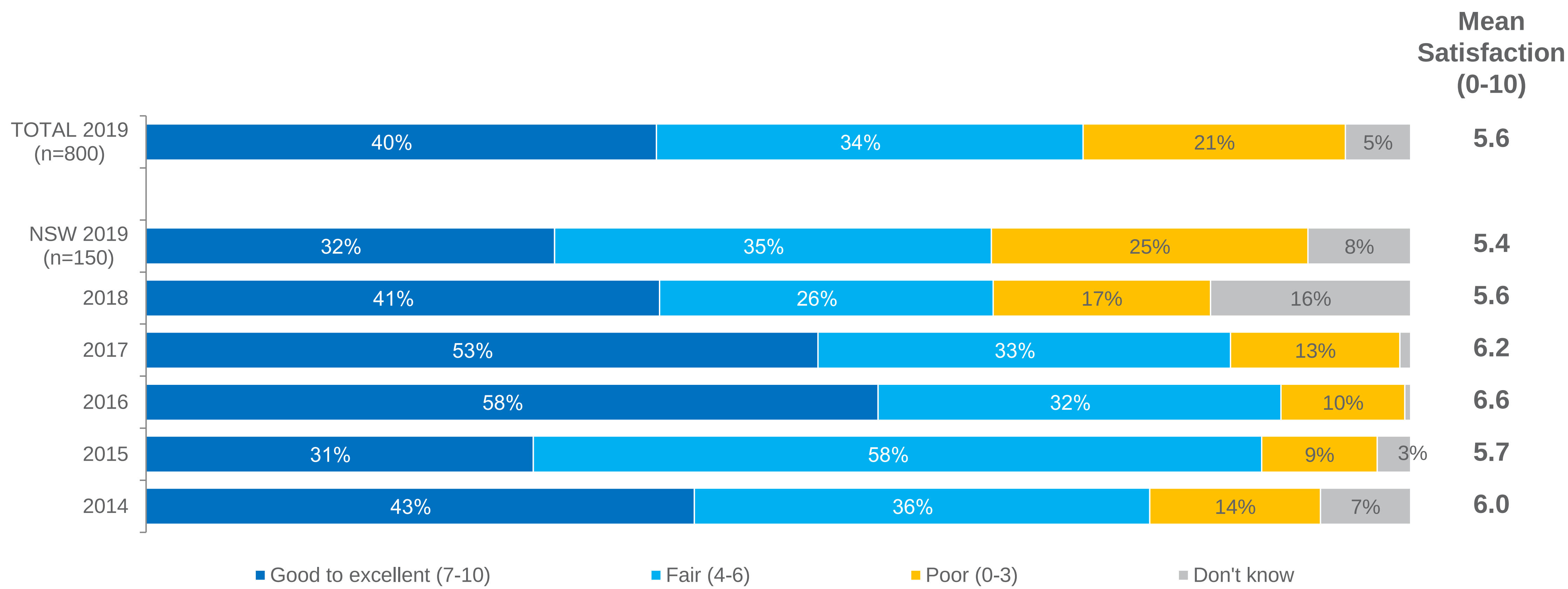
- NSW businesses in 2019 rated the customer service among electricity providers more highly than NSW businesses in 2018 (mean of 5.5 in 2018, compared to 6.7 in 2019).
- Just 8% of NSW businesses in 2019 rated the quality of customer service as poor (8%) which was significantly lower than the 30% of NSW businesses in 2018 who provided this response.



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 respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150).

Value for money among electricity providers

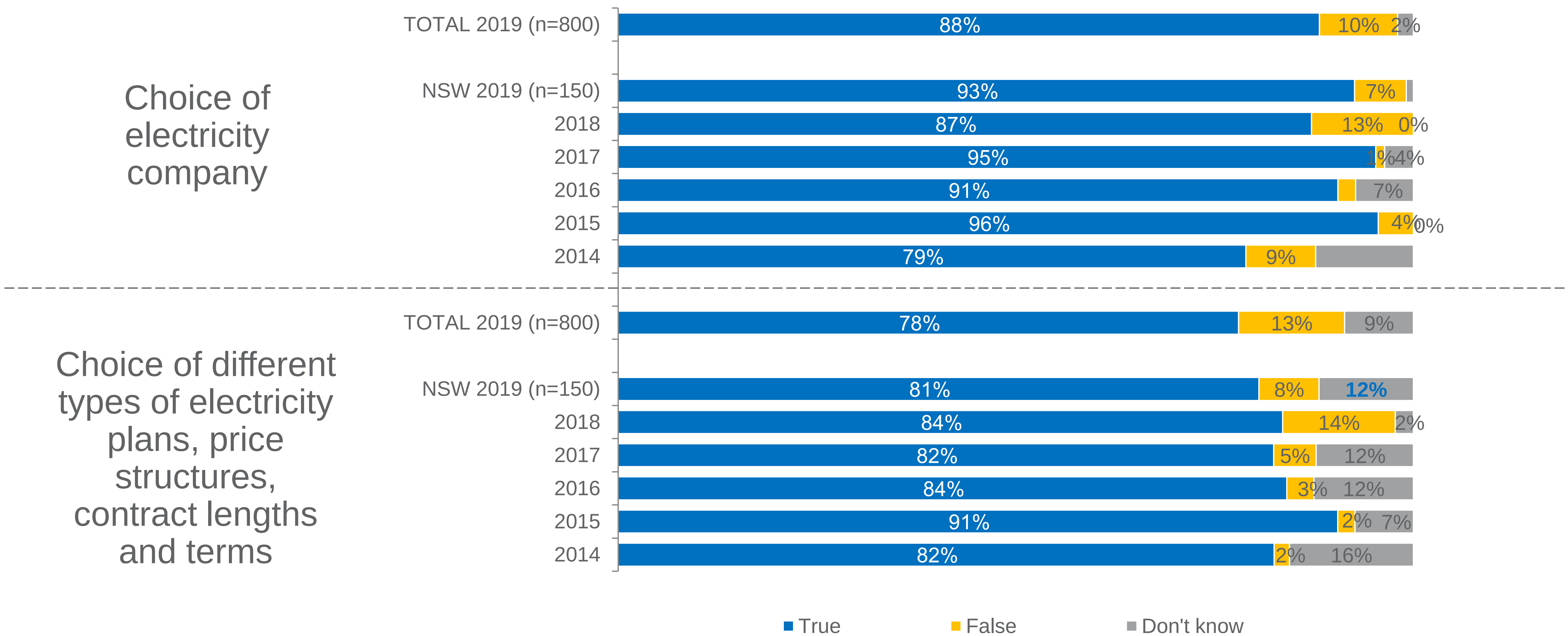
- Perceptions of value for money decreased slightly from a mean of 5.6 in 2018 to 5.4 in 2019.
- Of note, one in four (25%) NSW businesses in 2019 rated the value for money of their energy company's products and services as poor.



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 respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150)

Perceptions of choice – electricity market

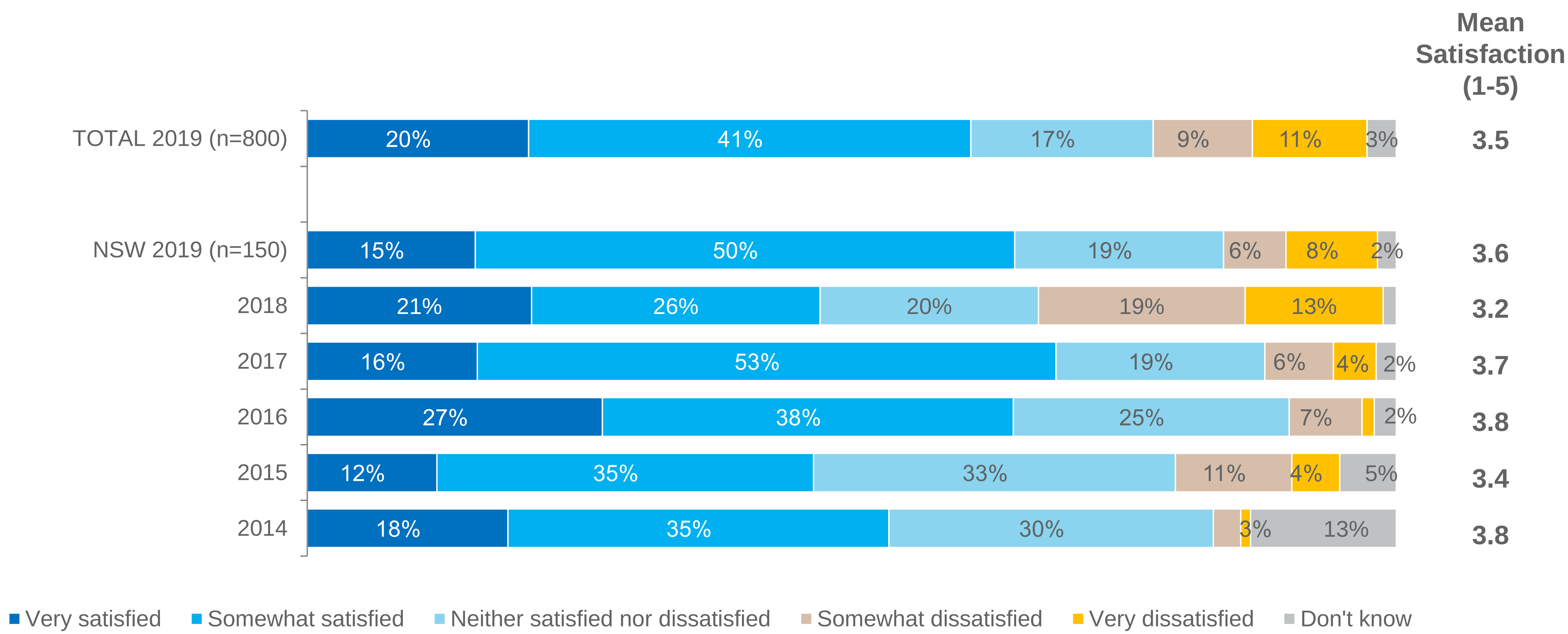
- The overwhelming majority of NSW businesses in 2019 think that businesses can choose their electricity company (93% in 2019, an increase from 87% in 2018).
- NSW businesses in 2019 were significantly more likely to indicate they 'don't know' if they can choose their type of electricity plan (12%, compared to 2% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150).

Satisfaction with choice of energy companies and plans

- Average satisfaction with the choice of energy companies and plans improved from 2018, with a mean of 3.6 recorded in 2019 compared to 3.2 in 2018, however this was not a statistically significant difference.



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 respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150).

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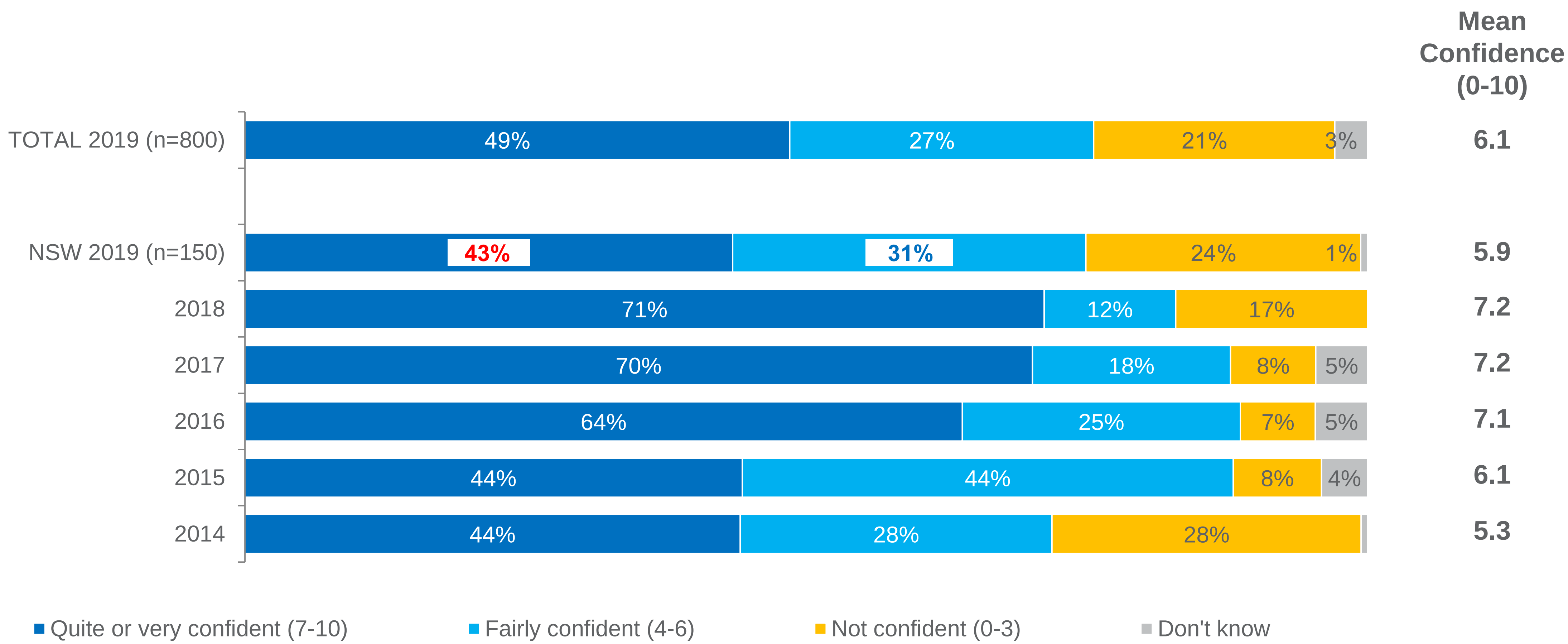
Confidence in finding the right information

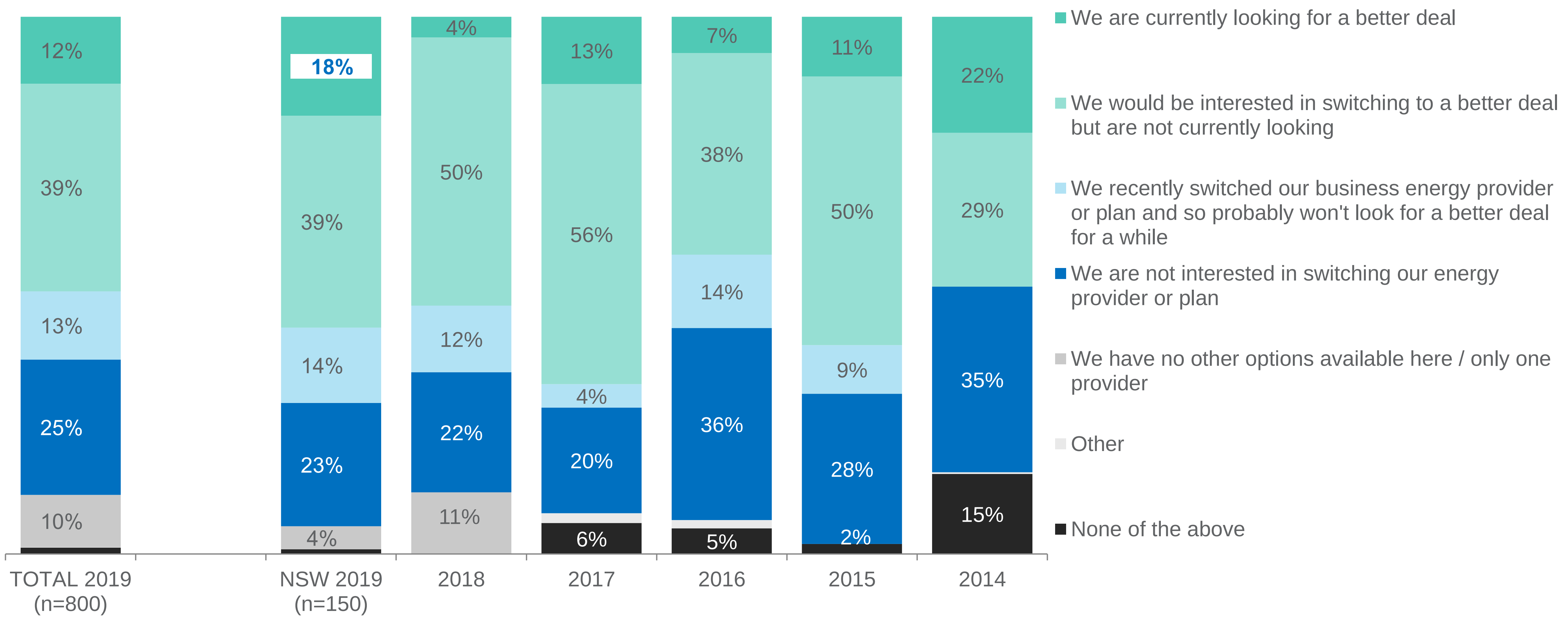
- The average level of confidence among NSW businesses to find the right information for choosing an energy plan decreased from 7.2 in 2018 to 5.9 in 2019.
- This result is due to NSW businesses in 2019 being significantly less likely to feel ‘quite or very confident’ (43% in 2019, compared to 71% in 2018), and instead, being significantly more likely to feel ‘fairly confident’ (31% in 2019, compared to 12% 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 respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150).

Intentions to switch in the future

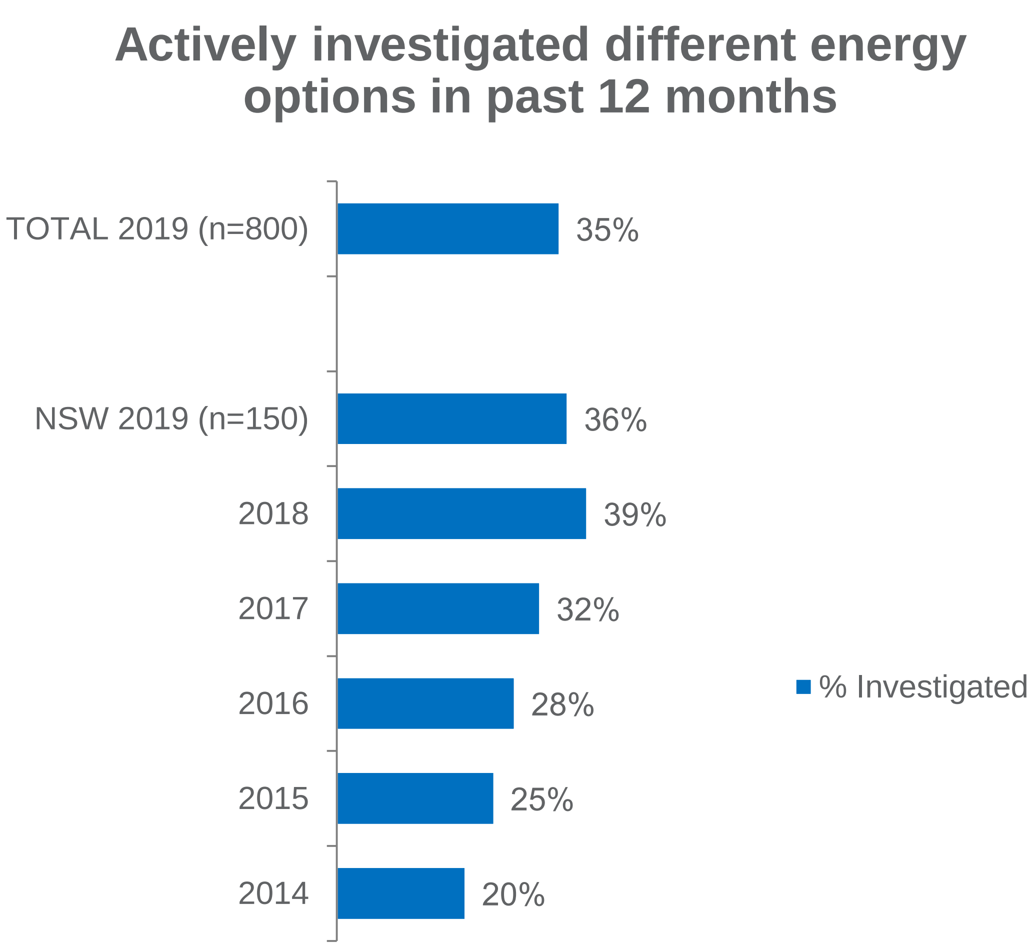
- NSW businesses in 2019 were significantly more likely to indicate they are currently looking for a better deal (18%, compared to 4% in 2018).

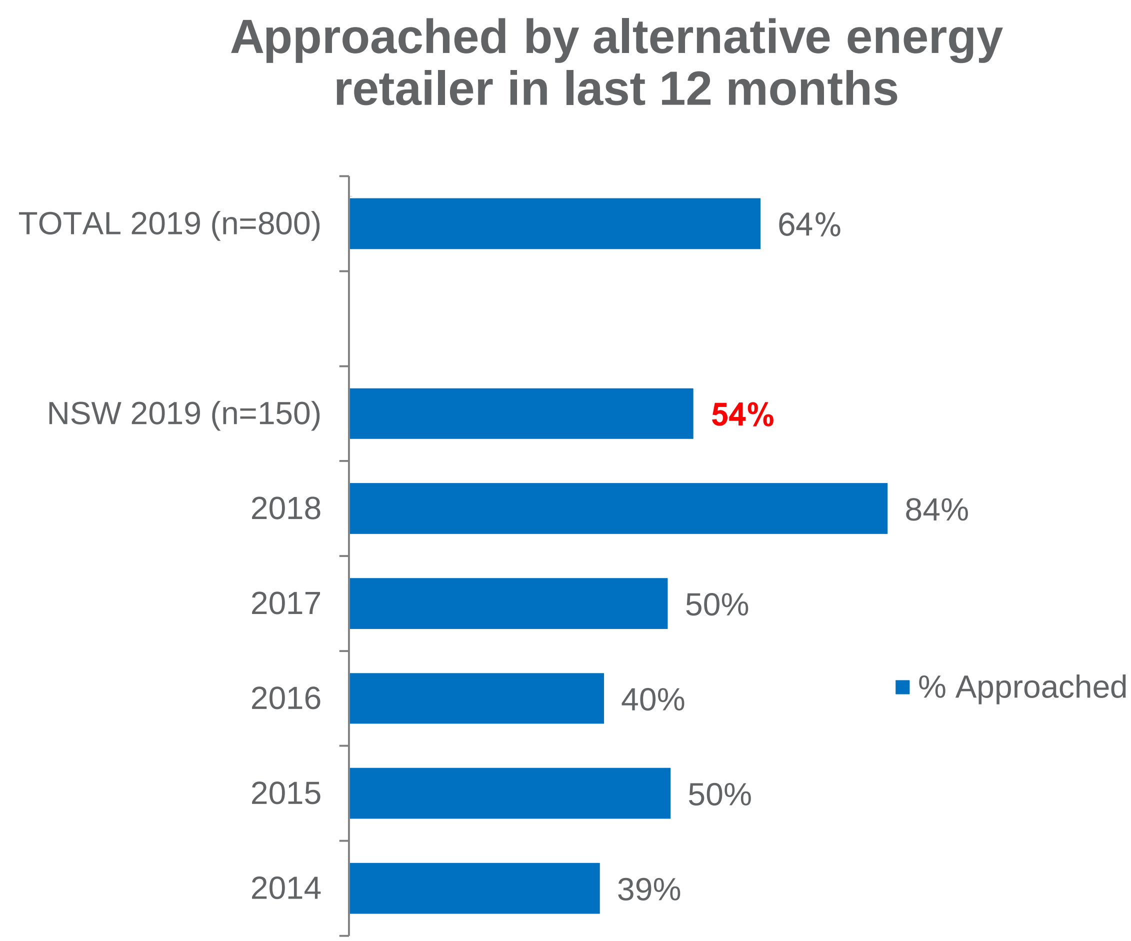


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150).

Interaction with alternative energy options / retailers

- Although the proportion of NSW businesses who have actively investigated energy options in the last 12 months decrease slightly from 2018 (39% in 2018, compared to 36% in 2019), the result in 2019 is still higher than previous results between 2014-2017.
- The proportion of NSW businesses reporting that they have been approached by an alternative energy retailer in the last 12 months decrease significantly to 54% in 2019, from 84% in 2018.

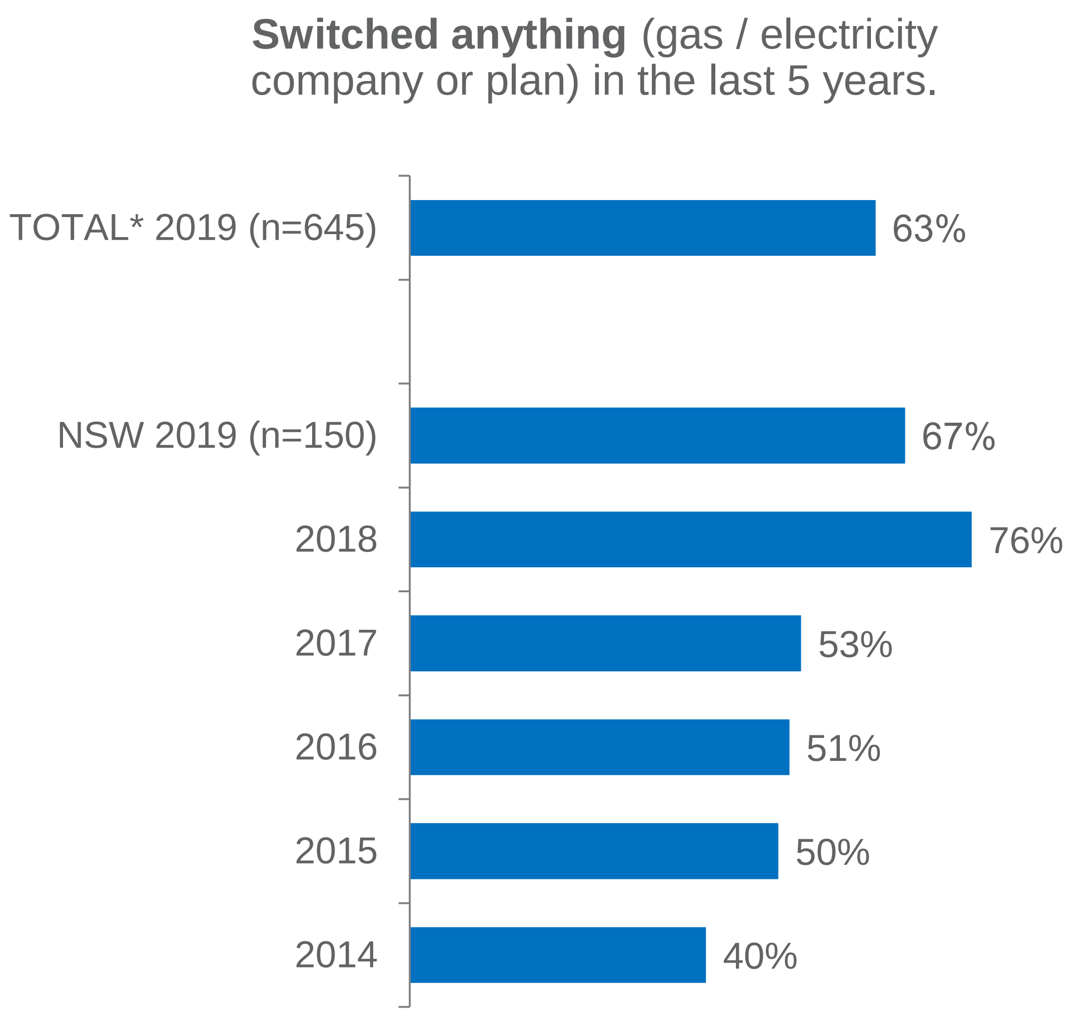




Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All NEM participants: 2018 (n=327). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=77); 2019 (n=150).

Rates of switching in the last 5 years

- Although a smaller proportion of NSW businesses in 2019 reported switching either their electricity/gas provider or plan in the last 5 years compared to NSW businesses in 2018 (76% in 2018, compared to 67% in 2019), the result from 2019 is still considerably higher than past results from 2014-2017 (ranging from 40% to 53%).

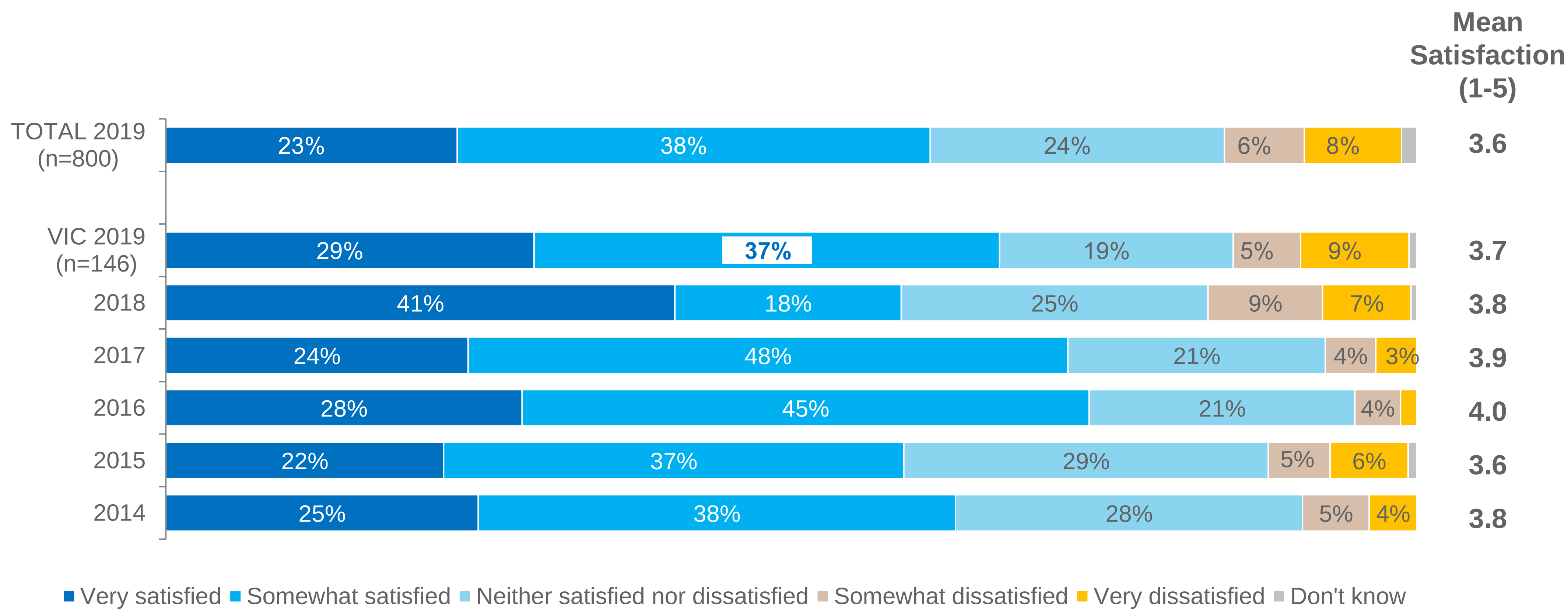


Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). NSW participants: 2014 (n=74); 2015 (n=100); 2016 (n=100); 2017 (n=101); 2018 (n=76); 2019 (n=150).

Victoria

Overall satisfaction with current electricity provider

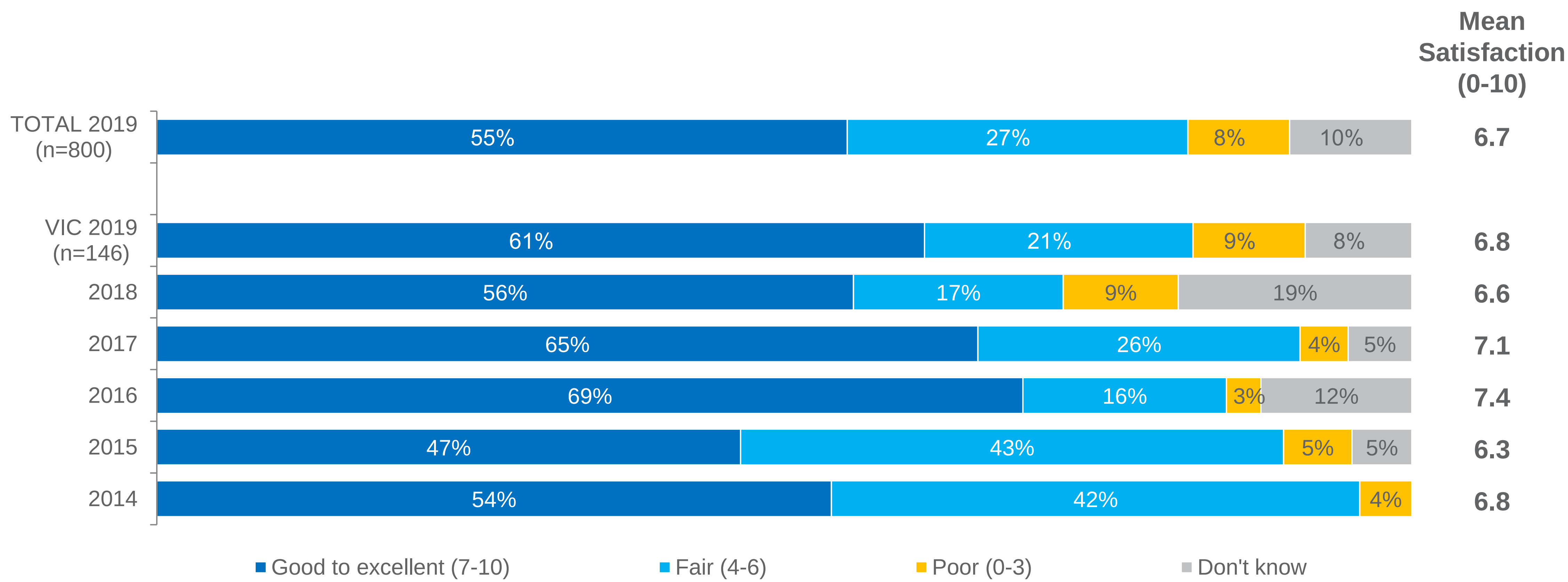
- VIC businesses in 2019 recorded similar levels of average satisfaction to previous years with no significant differences observed.
- Looking across all states and regions, VIC businesses recorded the second highest level of mean satisfaction with their current electricity provider (3.7, behind 3.8 for SA).



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 respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74) ; 2019 (n=146).

Satisfaction with customer service among electricity providers

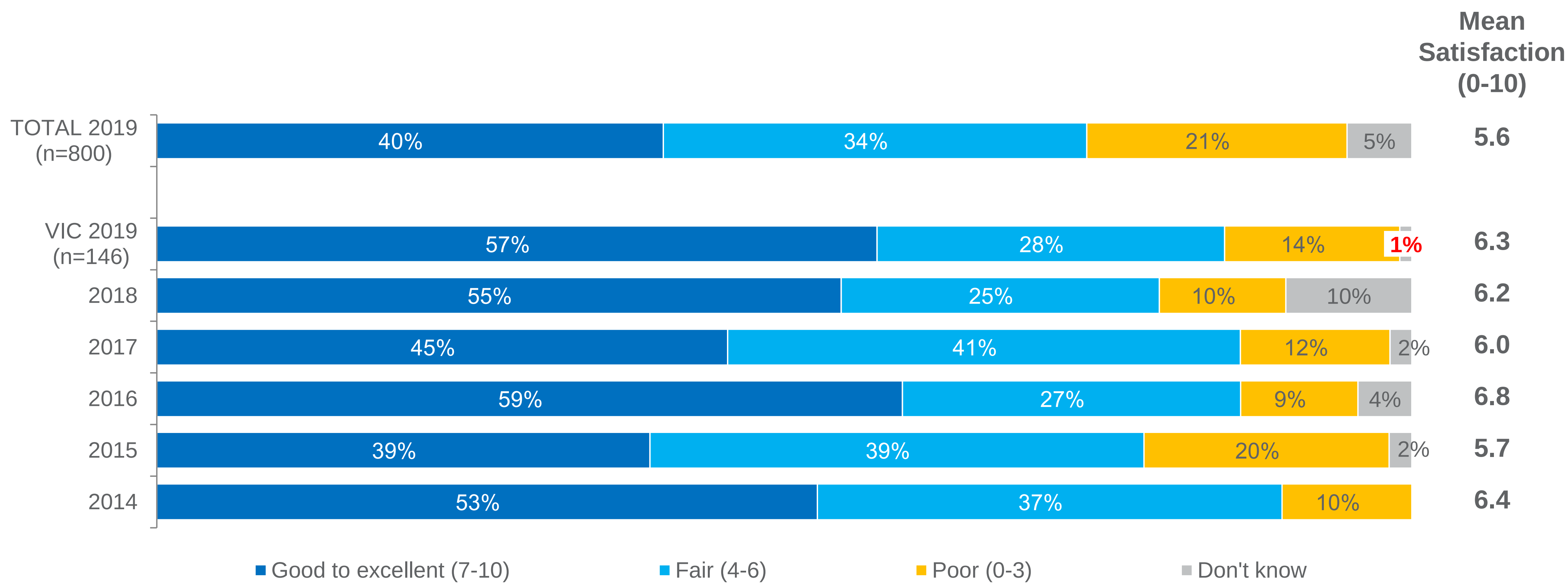
- Among VIC businesses, average satisfaction with the quality of customer service increased slightly from 6.6 in 2018 to 6.8 in 2019, however this was not a statistically significant difference.



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 respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74) ; 2019 (n=146).

Value for money among electricity providers

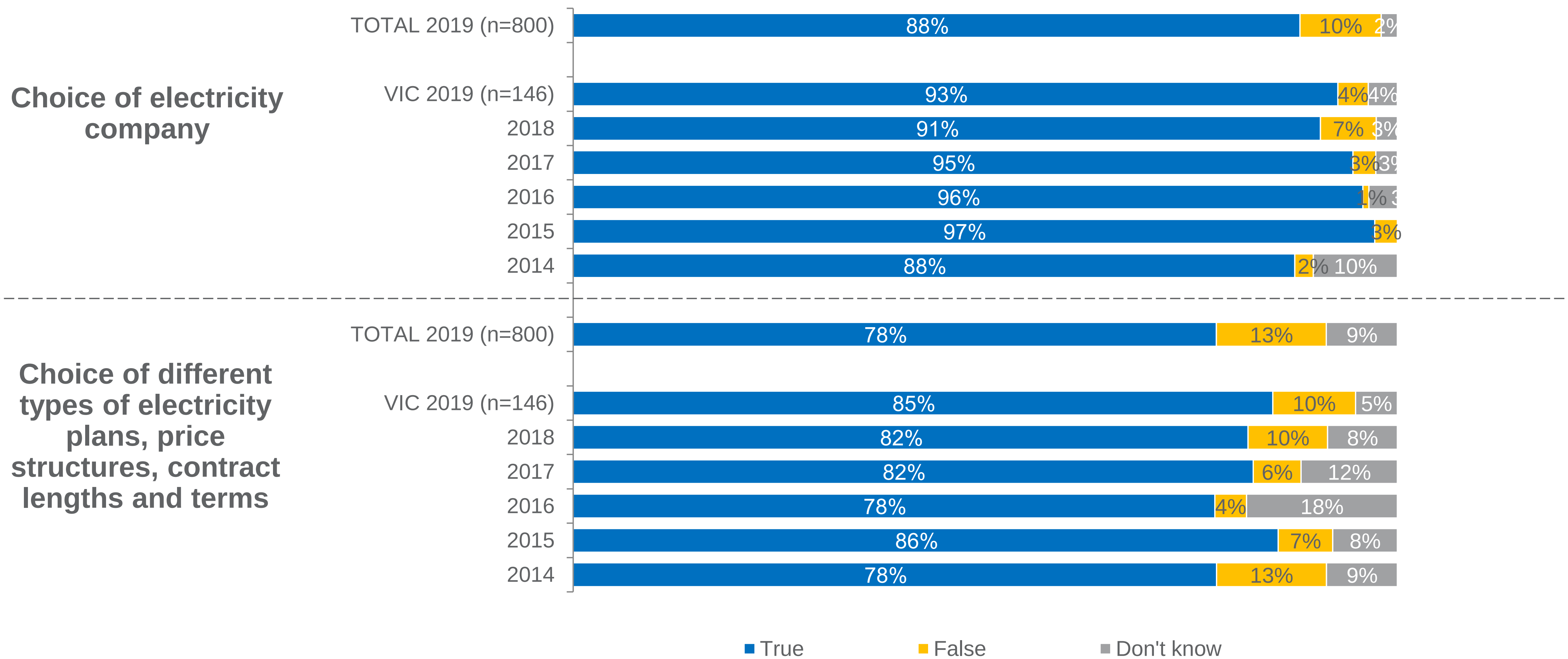
- The perceptions of VIC businesses in 2019 on their electricity provider's value for money was generally consistent with past results (6.3 in 2019, compared to 6.2 in 2018).
- VIC businesses in 2019 were significantly less likely to answer 'don't know' (1%, compared to 10% in 2018).



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 respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74) ; 2019 (n=146).

Perceptions of choice – electricity market

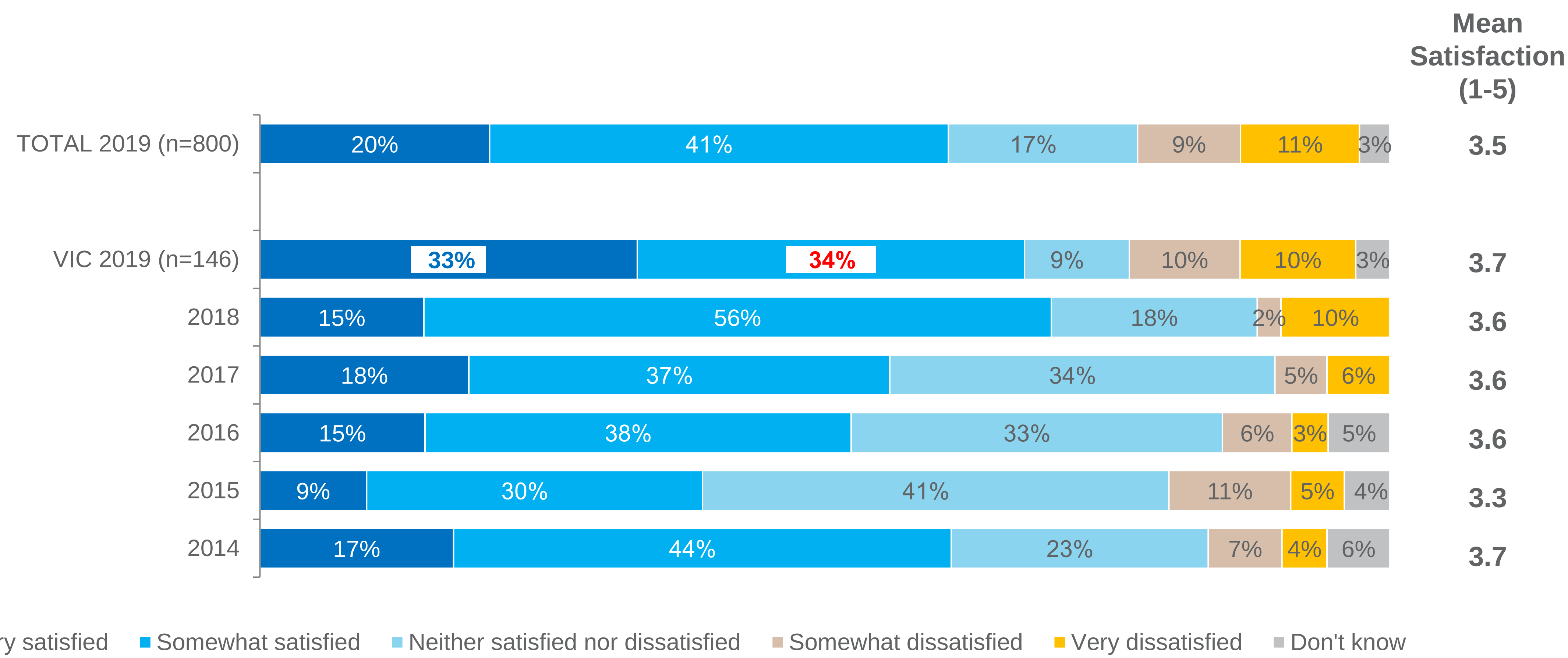
- The overwhelming majority of VIC businesses in 2019 think that they have a choice of electricity company (93%), and just 4% of VIC businesses in 2019 think that they do not have a choice (down from 7% in 2018).
- Further, 85% of VIC businesses in 2019 think they have a choice of electricity plan (85%), representing a slight increase from 82% in 2018.



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74) ; 2019 (n=146).

Satisfaction with choice of energy companies and plans

- Although the average level of satisfaction with the choice of energy companies has remained relatively consistent between 2018 (3.6) and 2019 (3.7), there has been a more positive shift towards feeling very satisfied rather than feeling somewhat satisfied.
- More specifically, VIC businesses in 2019 were significantly more likely to feel very satisfied (33%, compared to 15% in 2018), and significantly less likely to feel somewhat satisfied (34%, compared to 56% in 2018).

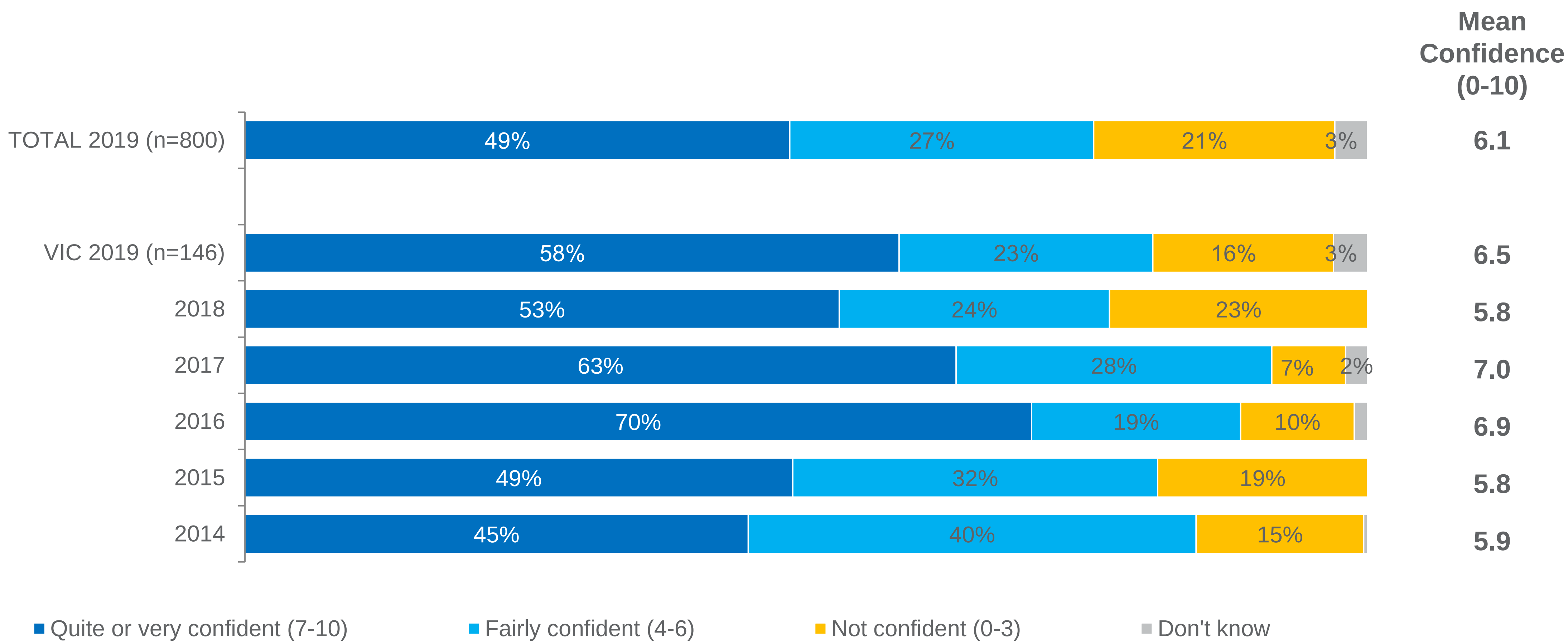


Q16. When it comes to energy companies and plans, how satisfied are you with the level of choice available to consumers in your state or territory?

Base: All respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74) ; 2019 (n=146).

Confidence in finding the right information

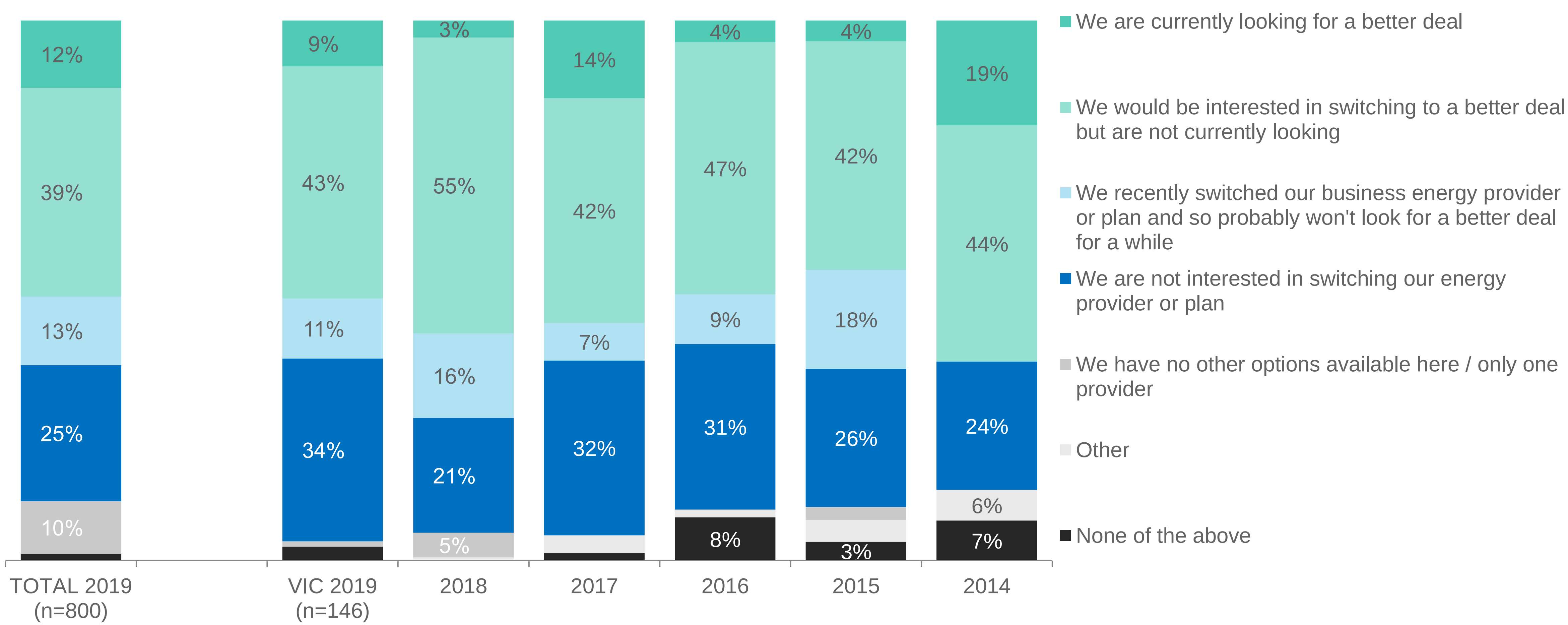
- Among VIC businesses, average self-rated confidence in finding the right information to help choose a suitable energy plan increased from 5.8 in 2018 to 6.5 in 2019, however this was not a statistically significant difference.



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 respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74) ; 2019 (n=146).

Intentions to switch in the future

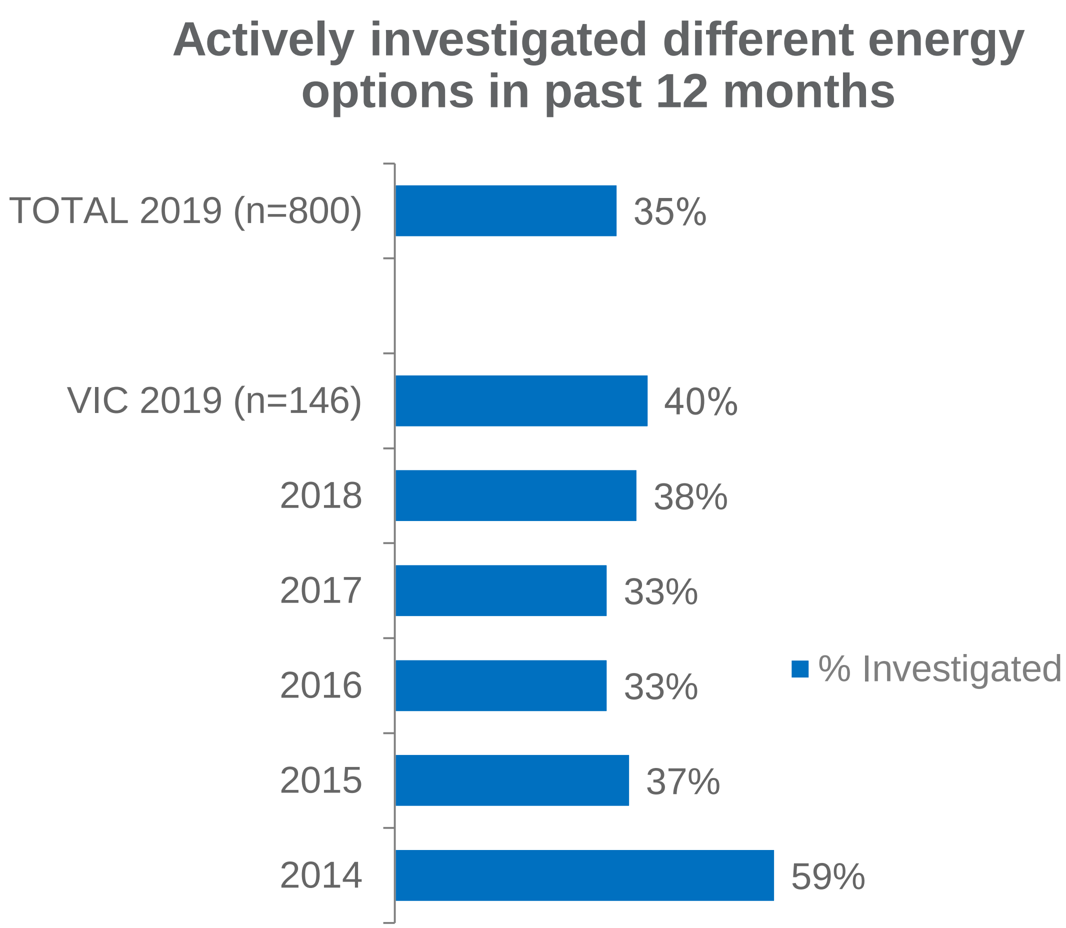
- Just over a third of VIC businesses in 2019 are not interested in switching their energy provider or plan; although this is higher than 21% in 2018, it is more aligned with 2017 (32%) and 2016 (31%) results.
- Almost one in ten VIC businesses in 2019 are currently looking for a better deal (9%, compared to 3% in 2018).

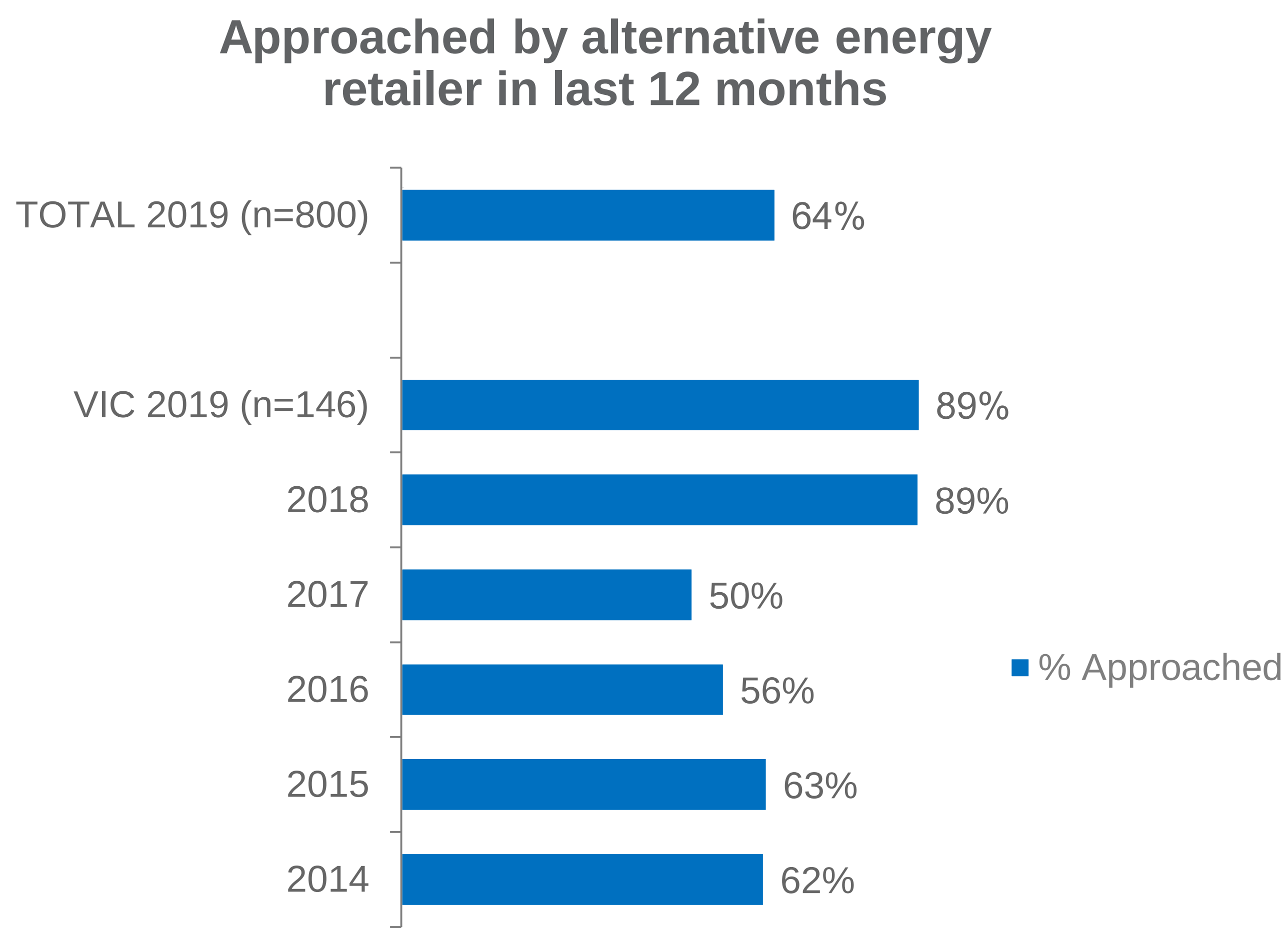


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74); 2019 (n=146).

Interaction with alternative energy options / retailers

- The proportion of VIC businesses actively investigating different energy options in the past 12 months continued to increased from 33% in 2017, to 38% in 2018, to 40% in 2019.
- A high proportion (89%) of VIC businesses in 2019 reported being approached by an alternative energy retailer in the last 12 months, consistent with the result from 2018 (also 89%).



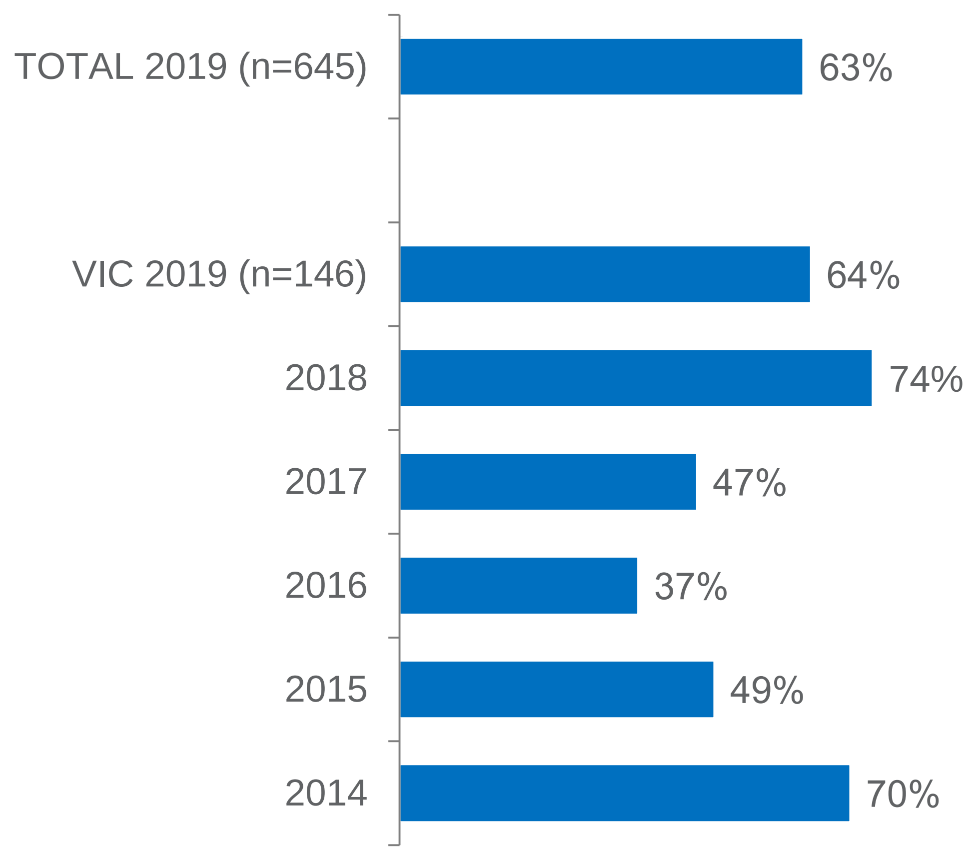


Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All respondents 2019 (n=800). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74); 2019 (n=146).

Rates of switching in the last 5 years

- Almost two-thirds (64%) of VIC businesses in 2019 reported that they have switched either their electricity/gas provider or plan in the past 5 years; this result is lower than 2018 where 74% of VIC businesses reported switching ‘anything’ in the past 5 years.

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

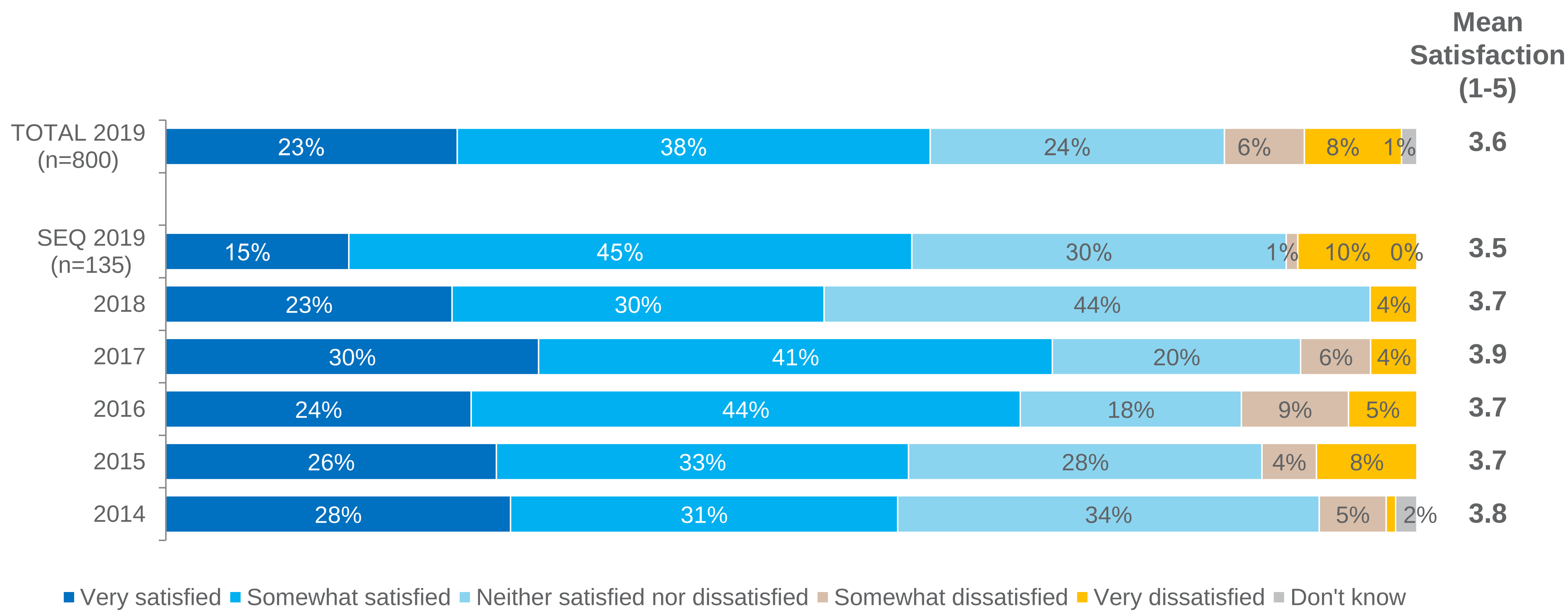


Q17. In the past 5 years, how many times has your business changed the following?
Base: All respondents in 2019 (excluding TAS & ROQ) (n=645). VIC participants: 2014 (n=73); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=74); 2019 (n=146)

South East Queensland

Overall satisfaction with current electricity provider

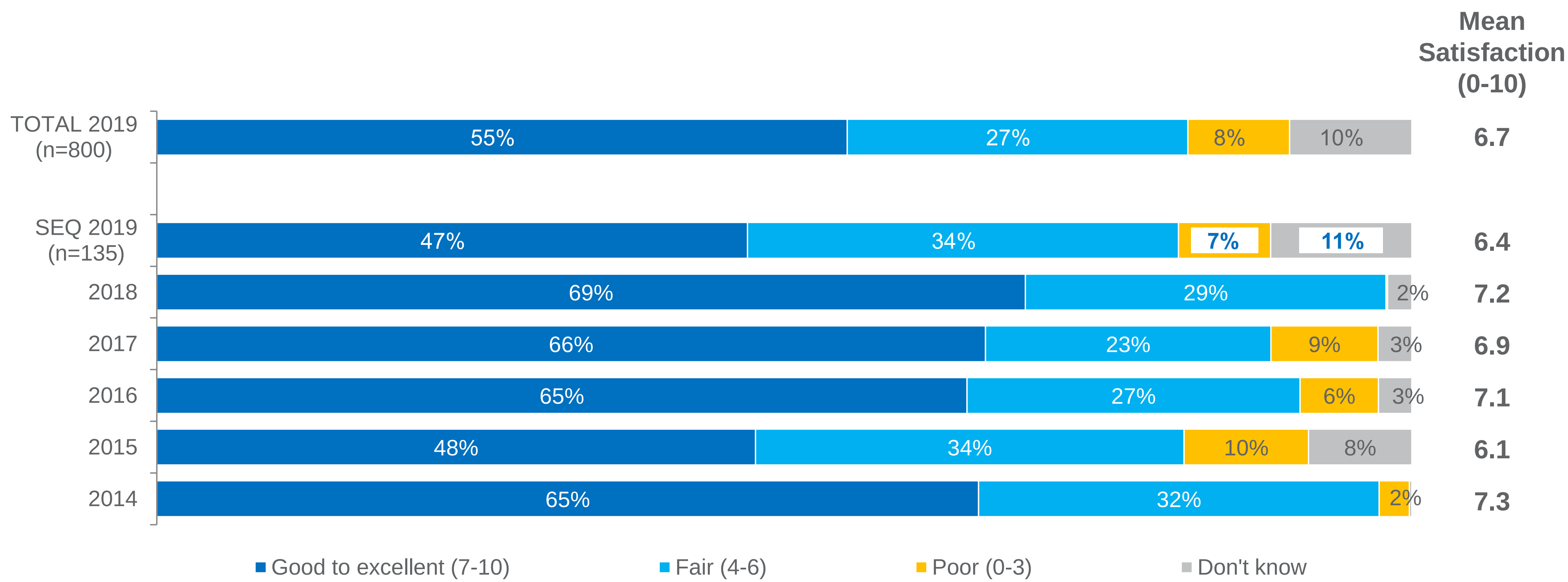
- SEQ businesses in 2019 recorded its lowest level of satisfaction on average with their current electricity provider compared to previous years (3.5 in 2019, compared to a mean range of 3.7-3.9 across 2014-2018).



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 respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Satisfaction with customer service among electricity providers

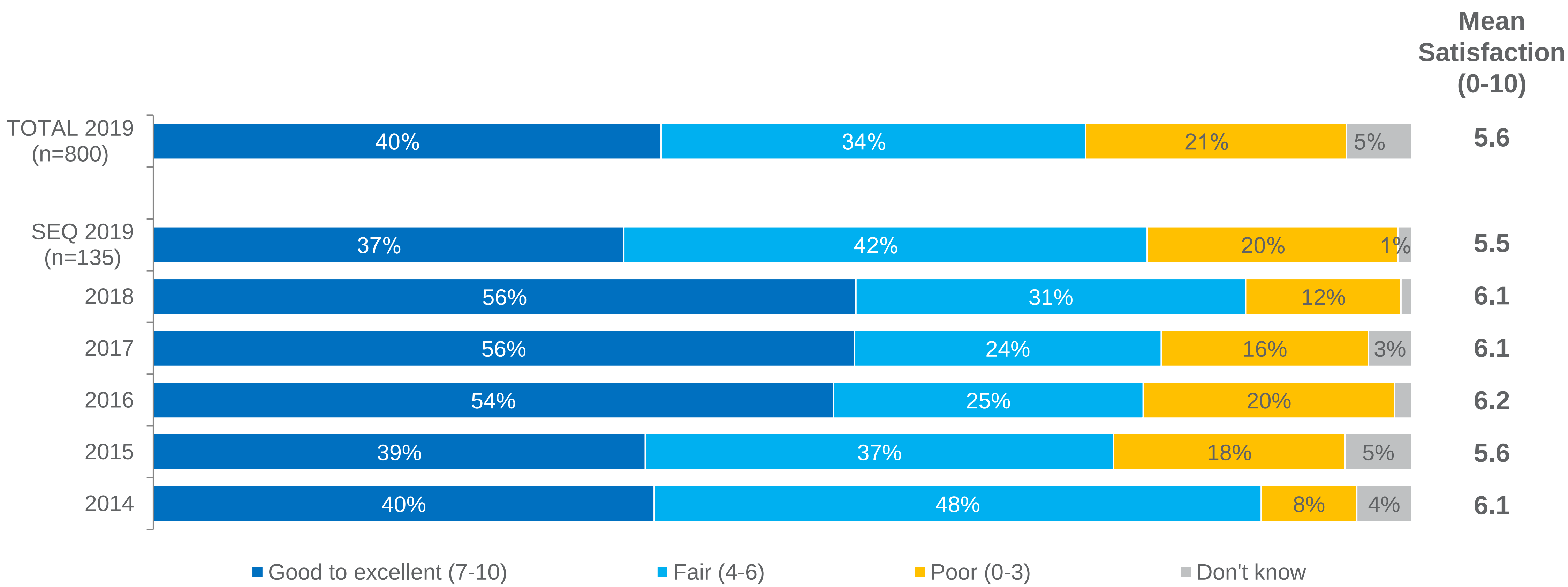
- SEQ business's satisfaction with the quality of customer service from their electricity providers decreased in 2019 (6.3, down from 7.2 in 2018).
- There was a significant increase in the proportion who rated the quality of customer service as 'poor' (7%, compared to 0% in 2018), as well as a significant increase for the response 'don't know' (11%, compared to 2% 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 respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Value for money among electricity providers

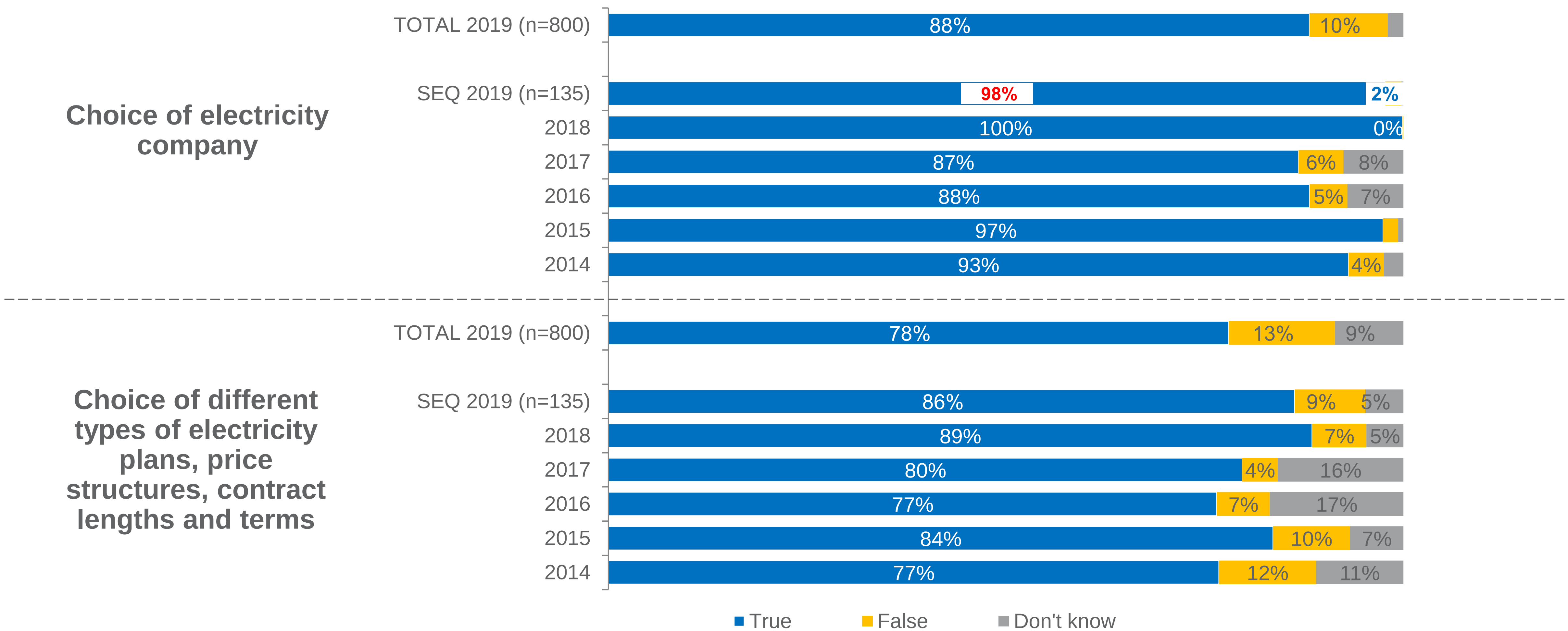
- Among SEQ businesses, perceptions of the value for money of energy retailers decreased from 6.1 in 2018, to a new low of 5.5 in 2019.



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 respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Perceptions of choice – electricity market

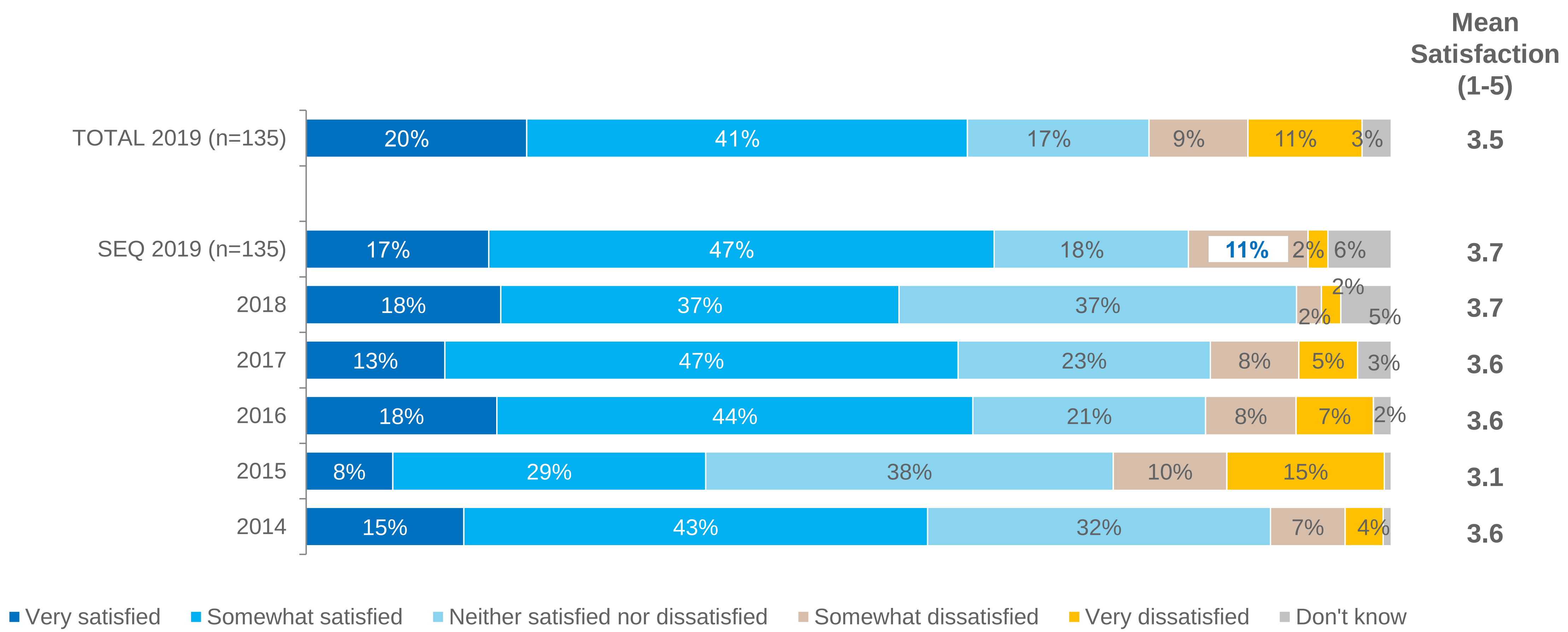
- Almost all SEQ businesses in 2019 answered that they have a choice of electricity company (98%), and a high proportion also felt they have a choice of electricity plans (86%).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Satisfaction with choice of energy companies and plans

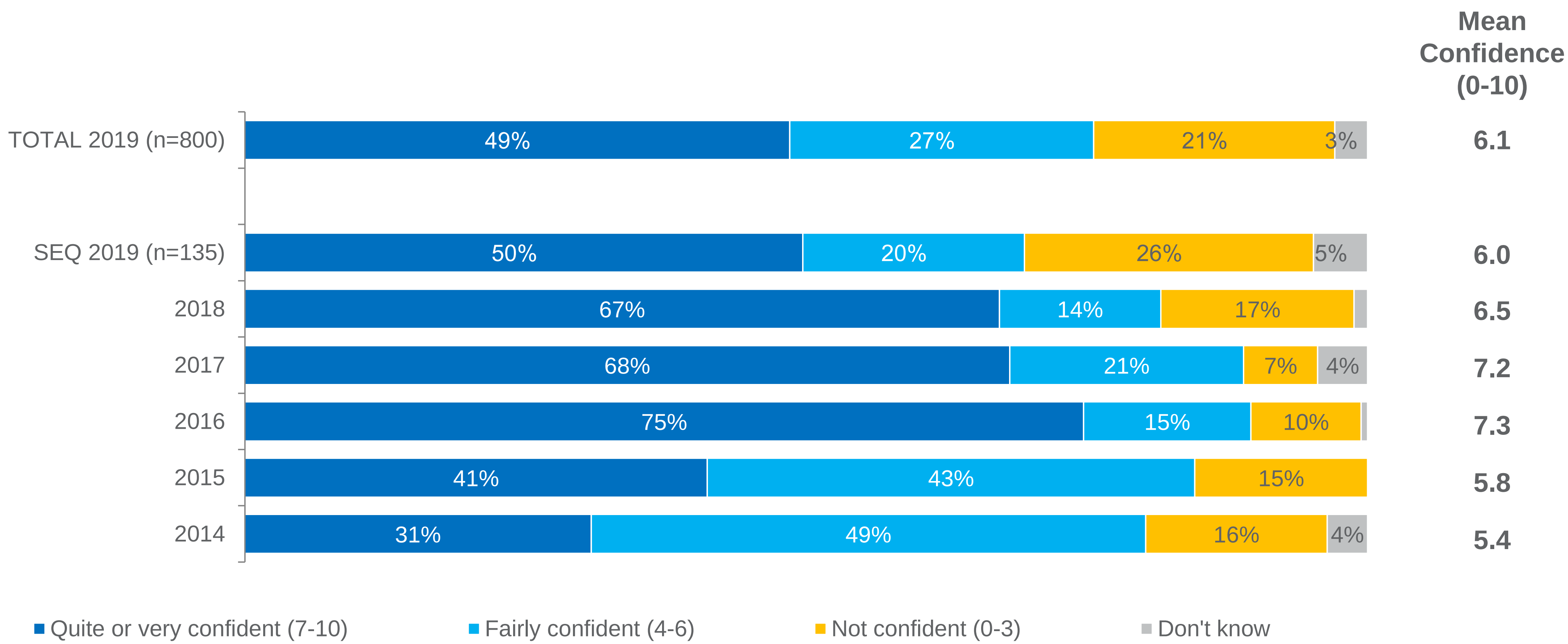
- Average satisfaction with the choice of energy companies and plans remained consistent with previous years, (3.7 in both 2018 and 2019).
- Of note, SEQ businesses in 2019 were significantly more likely to indicate they were somewhat dissatisfied with their choice of energy companies and plans (11%, compared to 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 respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Confidence in finding the right information

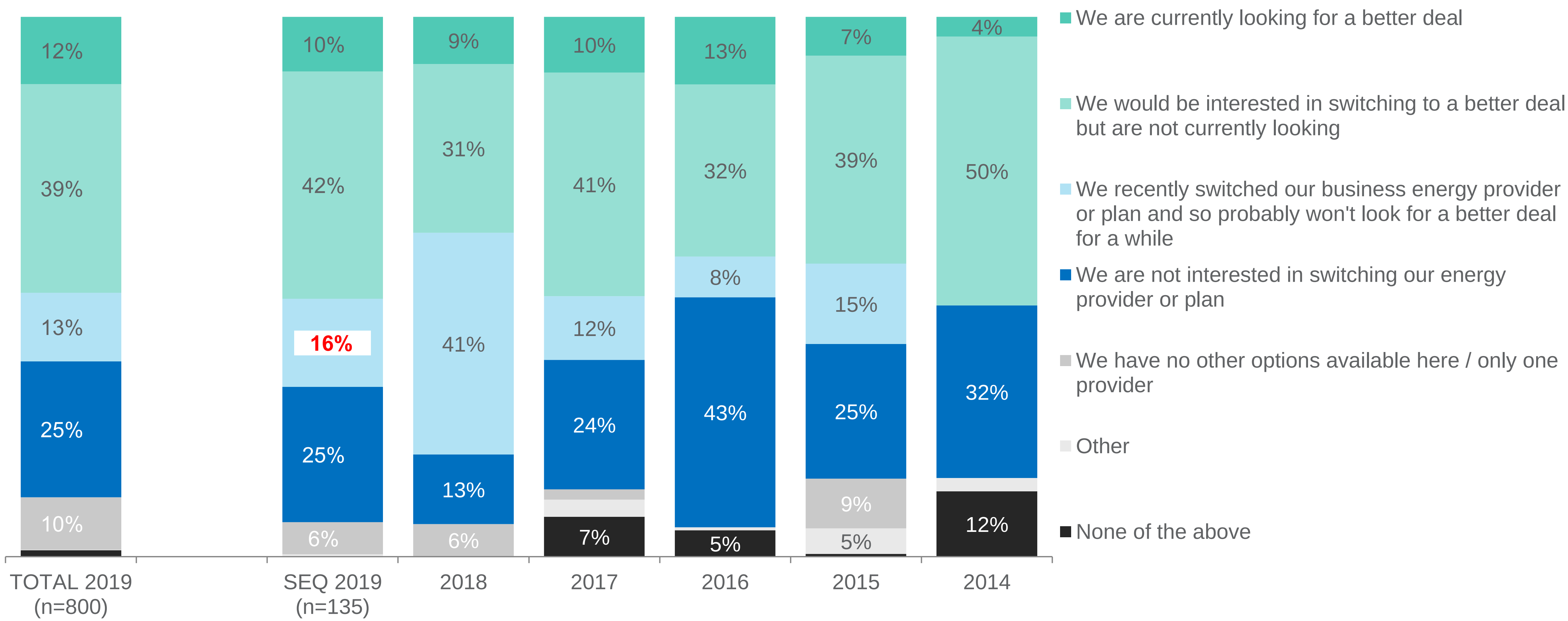
- There was a decrease in 2019 amongst SEQ businesses who feel confident in finding the right information to help them choose an energy plan (6.0 in 2019, down from 6.5 in 2018).



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 respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Intentions to switch in the future

- SEQ businesses in 2019 were significantly less likely to answer ‘we recently switched our business energy provider or plan and so probably won’t look for a better deal for a while’ (16%, compared to 41% in 2018).

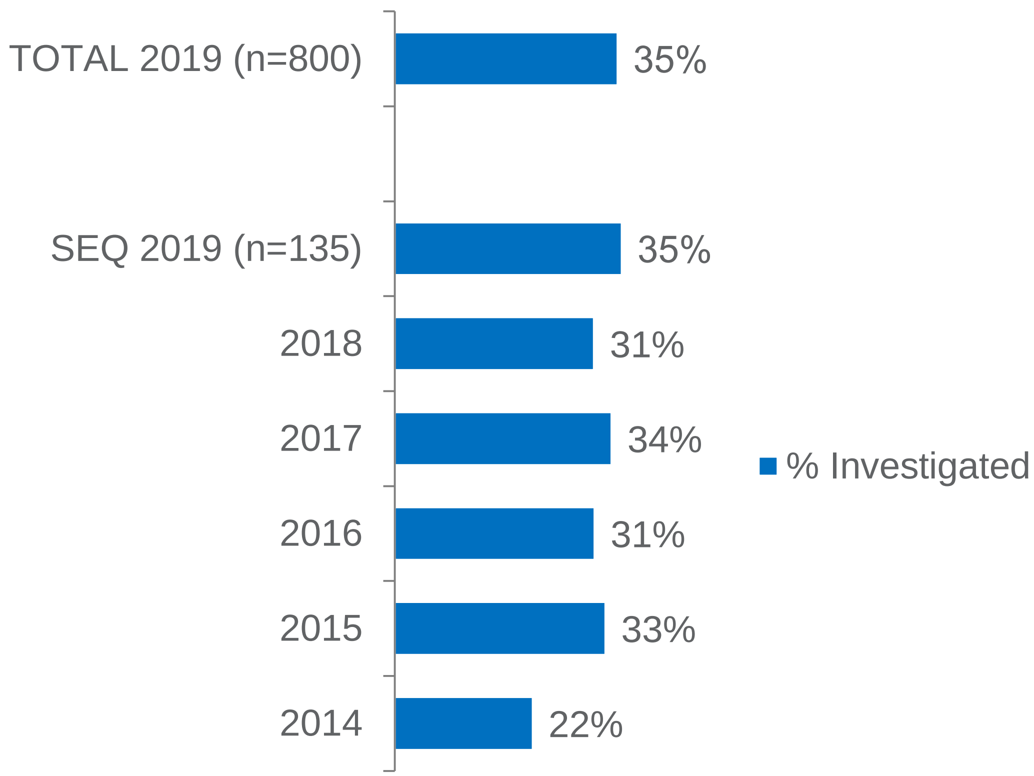


Q34. When it comes to your business’s energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

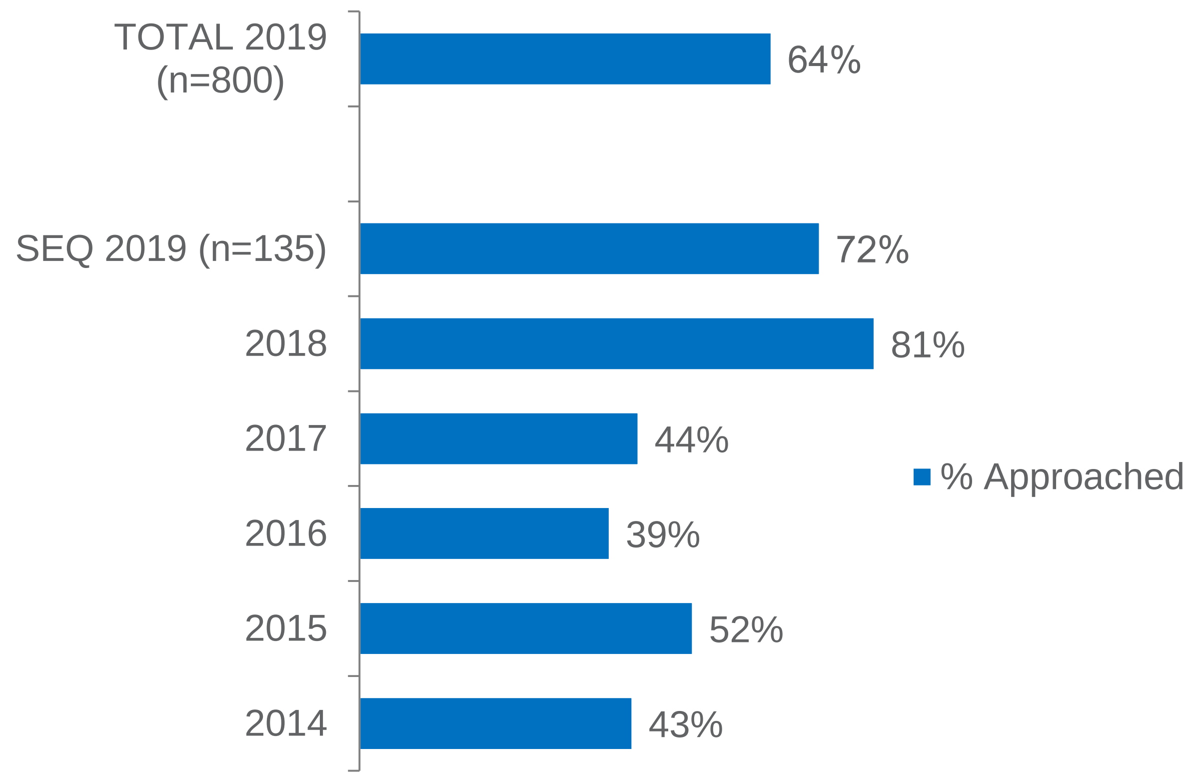
Interaction with alternative energy options / retailers

- Around a third (35%) of SEQ businesses in 2019 actively investigated different energy options in the past 12 months, slightly higher than the result in 2018 (31%).
- Almost three-quarters (72%) of SEQ businesses in 2019 reported that they have been approached by an alternative energy retailer in the past 12 months, representing a decrease from 81% in 2018 (but still well above previous results from 2014-2017 which range from 39% to 52%).

Actively investigated different energy options in past 12 months



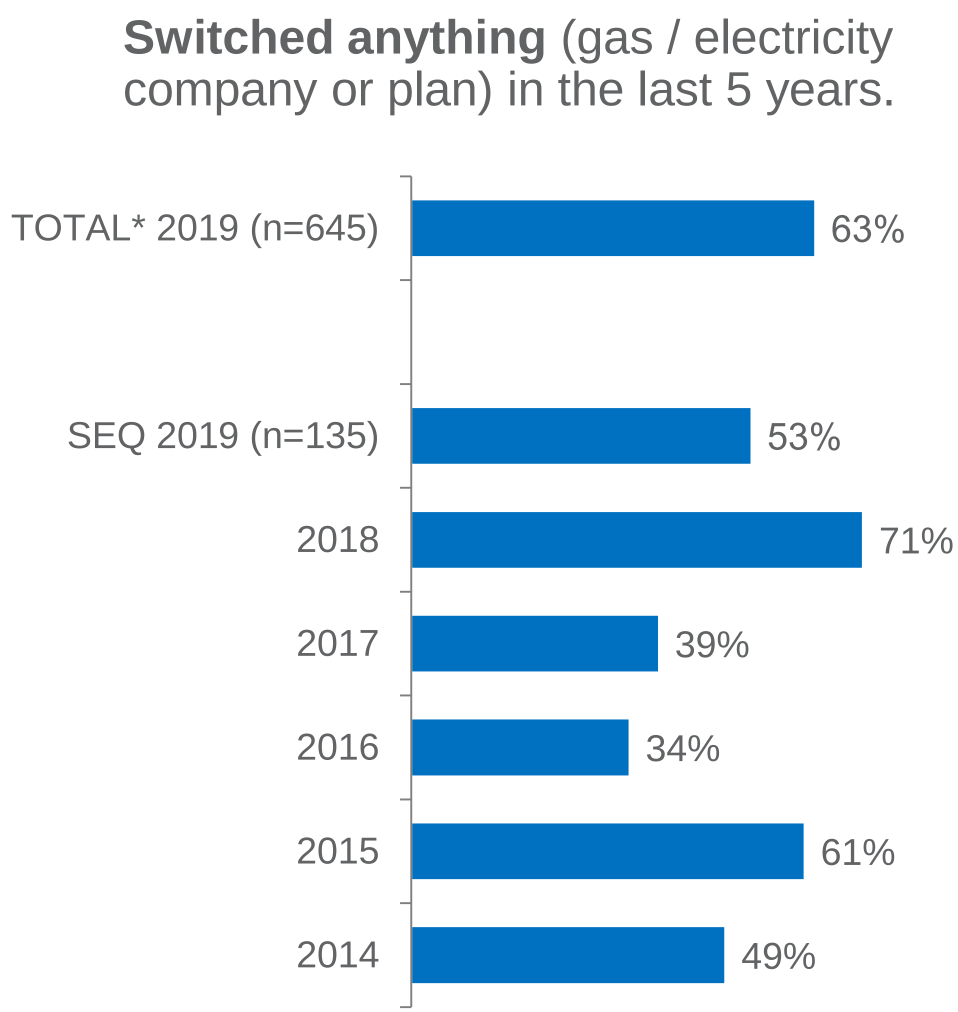
Approached by alternative energy retailer in last 12 months



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 respondents 2019 (n=800). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

Rates of switching in the last 5 years

- Just over half (53%) of SEQ businesses in 2019 reported switching either their electricity/gas provider or plan in the past 5 years, however this did represent a decrease from 71% in 2018.

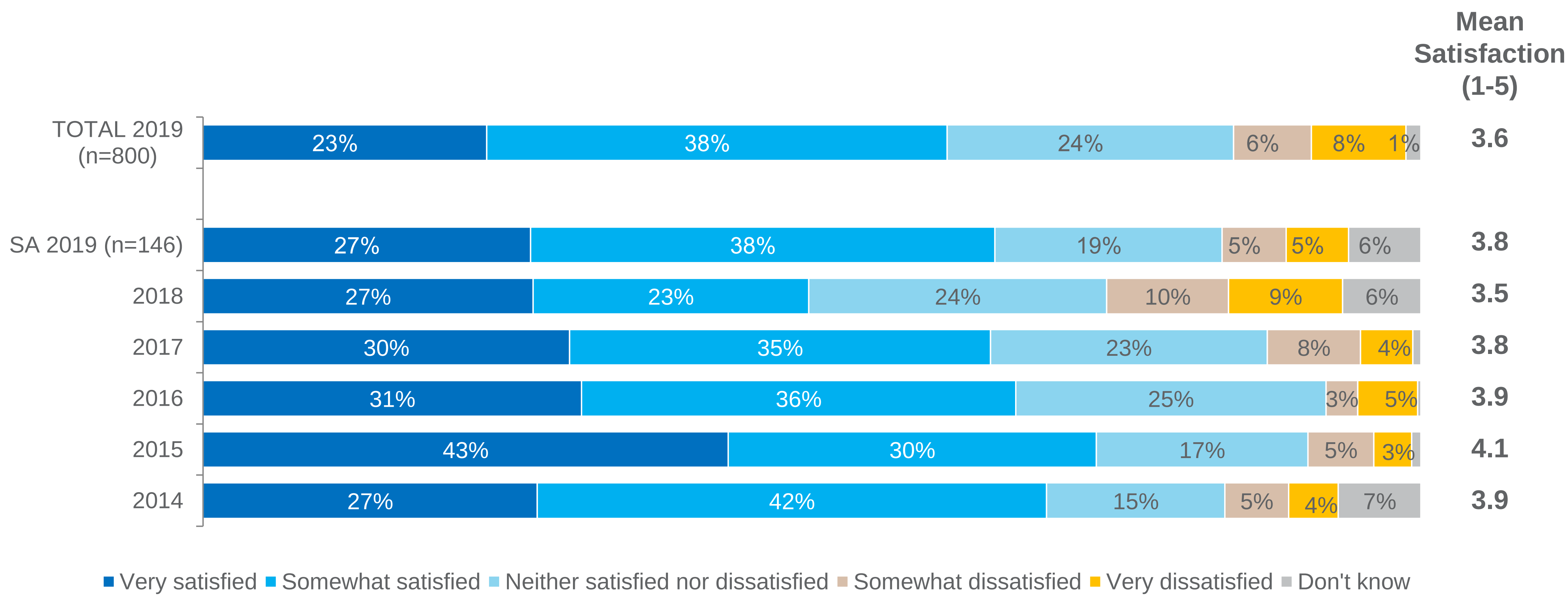


Q17. In the past 5 years, how many times has your business changed the following?
Base: All NEM participants 2018 (n=325). SEQ participants: 2014 (n=96); 2015 (n=100); 2016 (n=100); 2017 (n=100); 2018 (n=69); 2019 (n=135).

South Australia

Overall satisfaction with current electricity provider

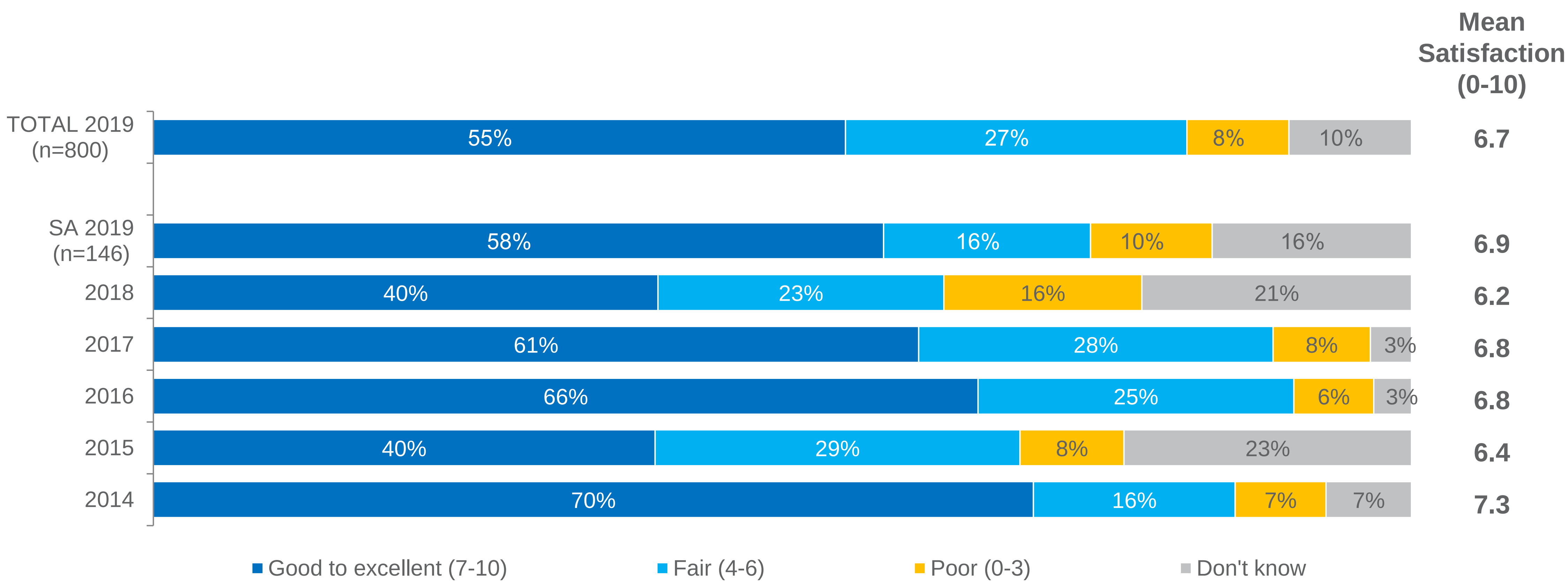
- Average satisfaction with the current electricity provider increased in 2019 among SA businesses (3.5 in 2018 to 3.8 in 2019), however this was not a statistically significant difference.
- Compared to other states and regions, SA recorded the highest mean level of satisfaction with their current electricity provider.



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 respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

Satisfaction with customer service among electricity providers

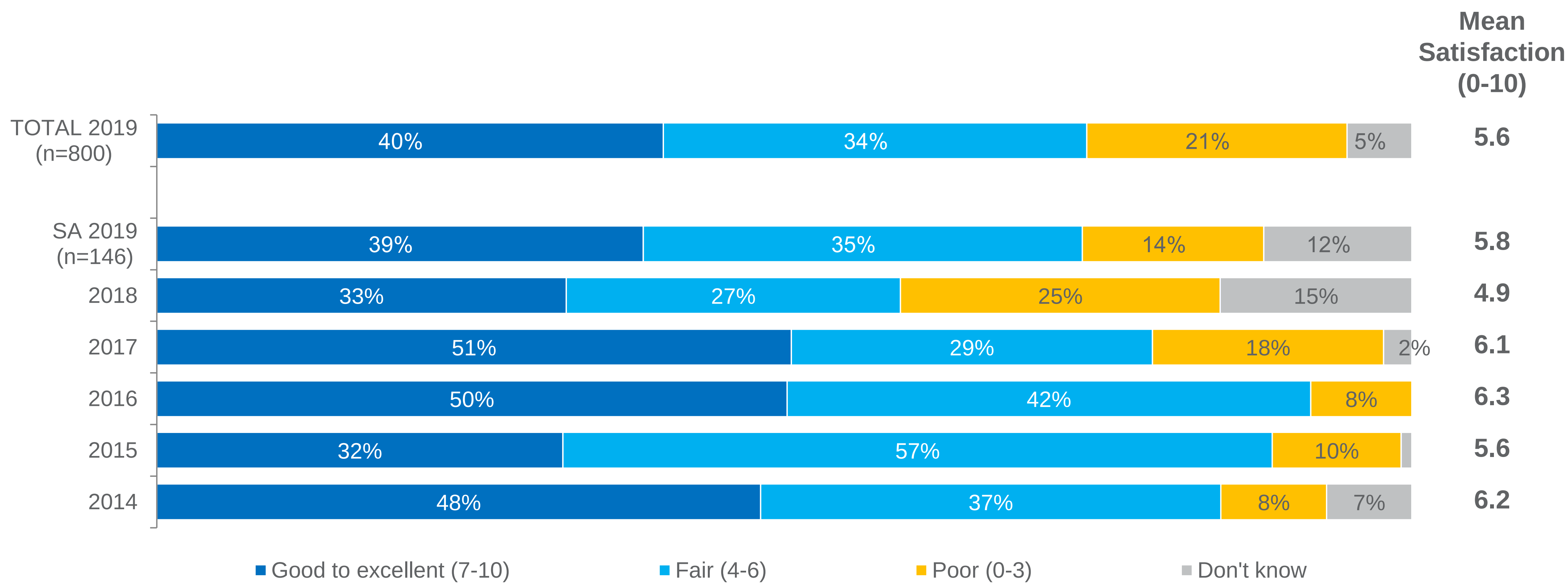
- SA businesses in 2019 recorded a higher mean satisfaction with their electricity provider's customer service compared to 2018 results (6.2 in 2018, compared to 6.9 in 2019), however this was not a statistically significant difference.



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 respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

Value for money among electricity providers

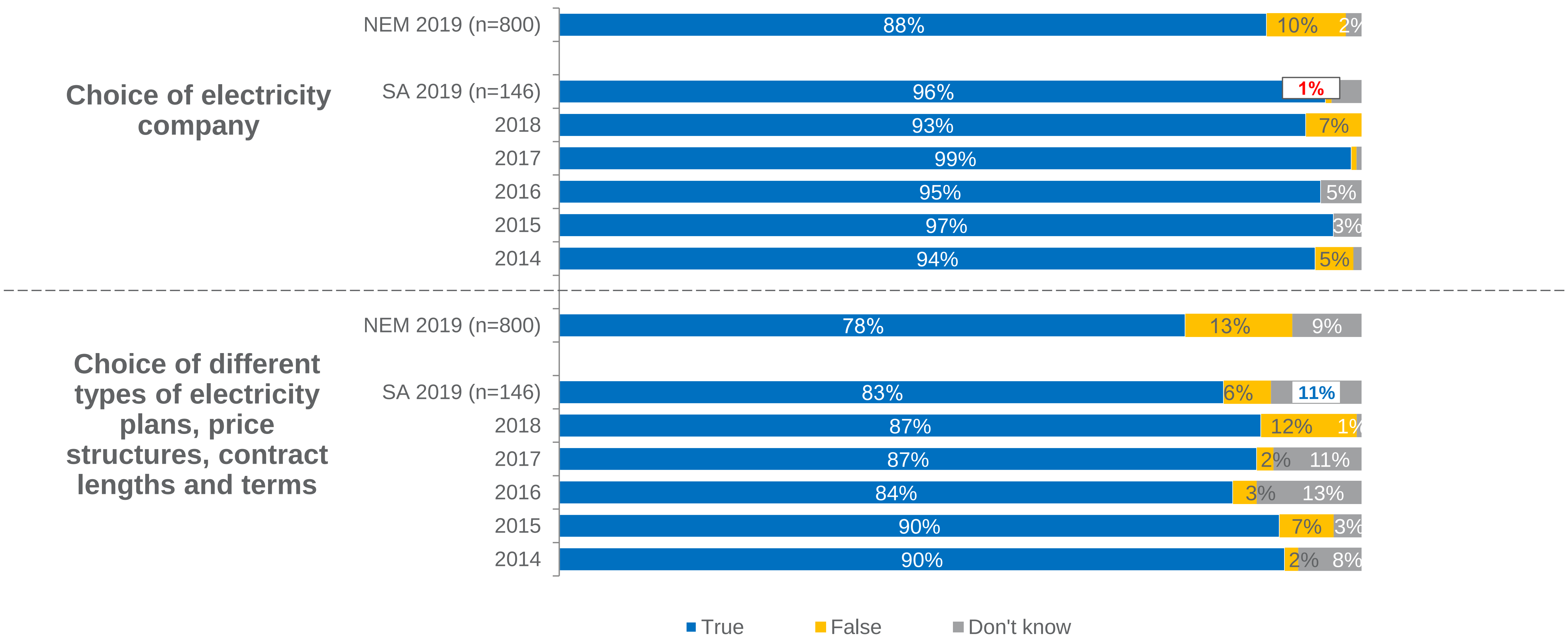
- SA businesses recorded a higher mean satisfaction in 2019 for rating the value for money of electricity retailers compared to the previous year (4.9 in 2018, compared to 5.8 in 2019).



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 respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

Perceptions of choice – electricity market

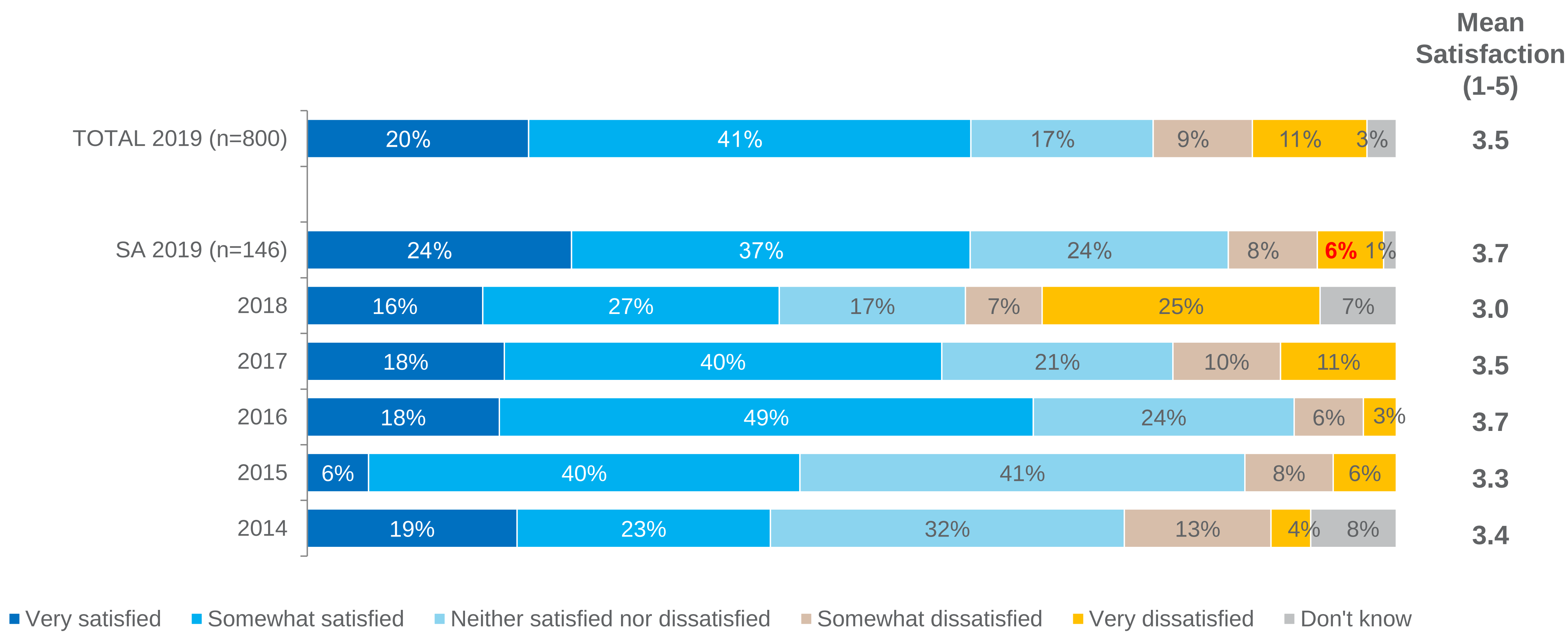
- SA businesses in 2019 were significantly less likely to answer 'false' in regards to whether they think they have a choice of electricity company (1%, compared to 7% in 2018).
- In terms of have a choice between different types of electricity plans, SA businesses were more likely to answer 'don't know' (11%, compared to 1% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

Satisfaction with choice of energy companies and plans

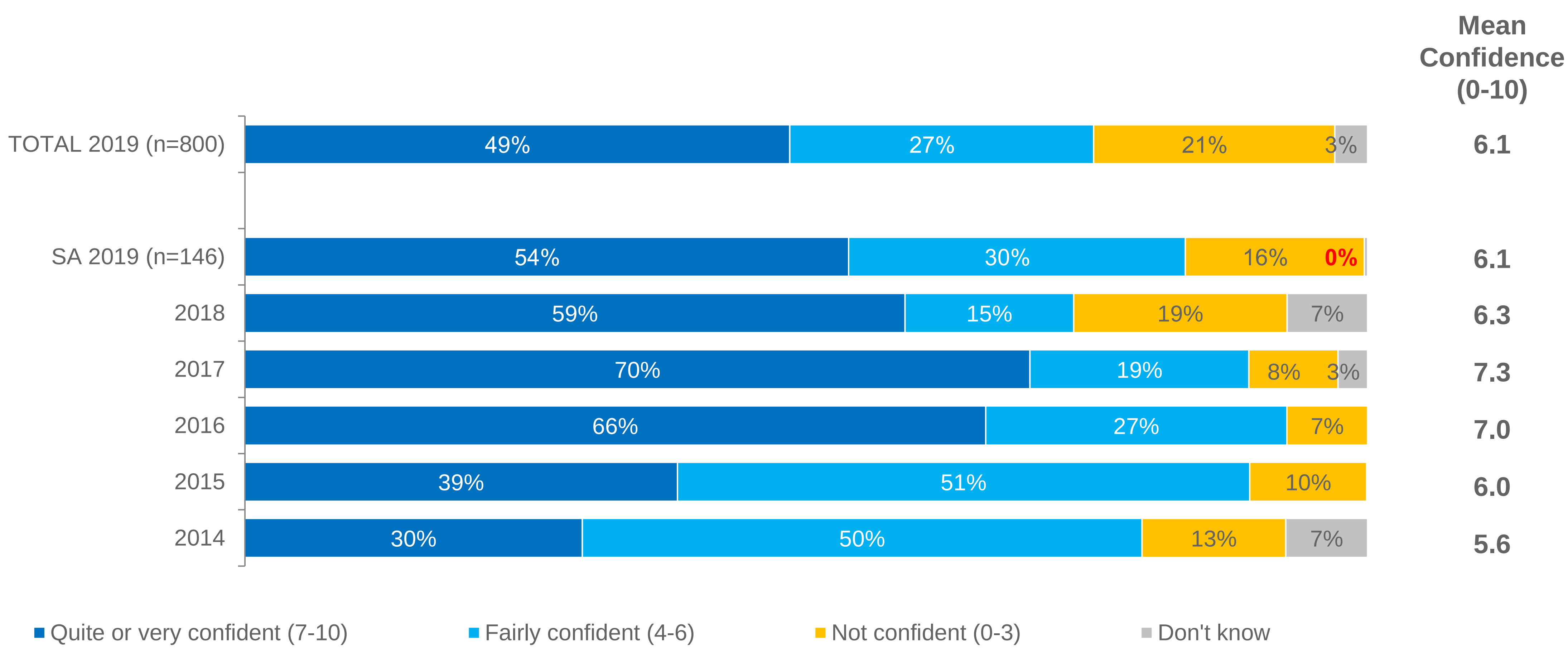
- The level of satisfaction with regards to choice of energy companies and plans increased in 2019 among SA businesses (from 3.0 in 2018 to 3.7 in 2019).
- This was driven by a significant decrease in the proportion of SA businesses who answered that they are very dissatisfied (6% in 2019, compared to 25% 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 respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

Confidence in finding the right information

- The level of confidence among SA businesses to find the right information to help them choose an energy plan fell slightly from 6.3 in 2018, to 6.1 in 2019.
- SA businesses in 2019 were significantly less likely to answer 'don't know' (0%, compared to 7% overall).



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 respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

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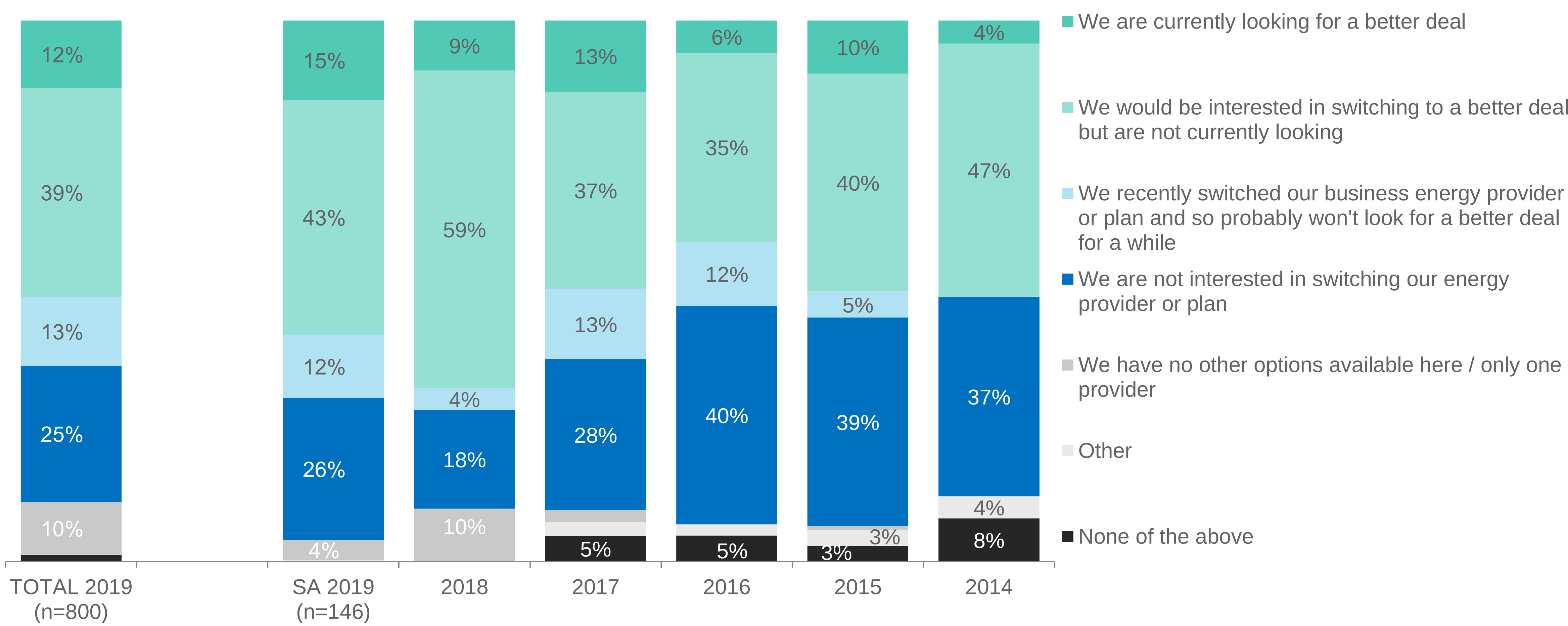
Intentions to switch in the future

- Although there was a higher proportion of SA businesses who indicated that they are current looking for a better deal (15%, compared to 9% in 2018), this 'propensity to switch' was offset by a lower proportion who would be interested in switching but are not currently looking (43%, compared to 59% in 2018).

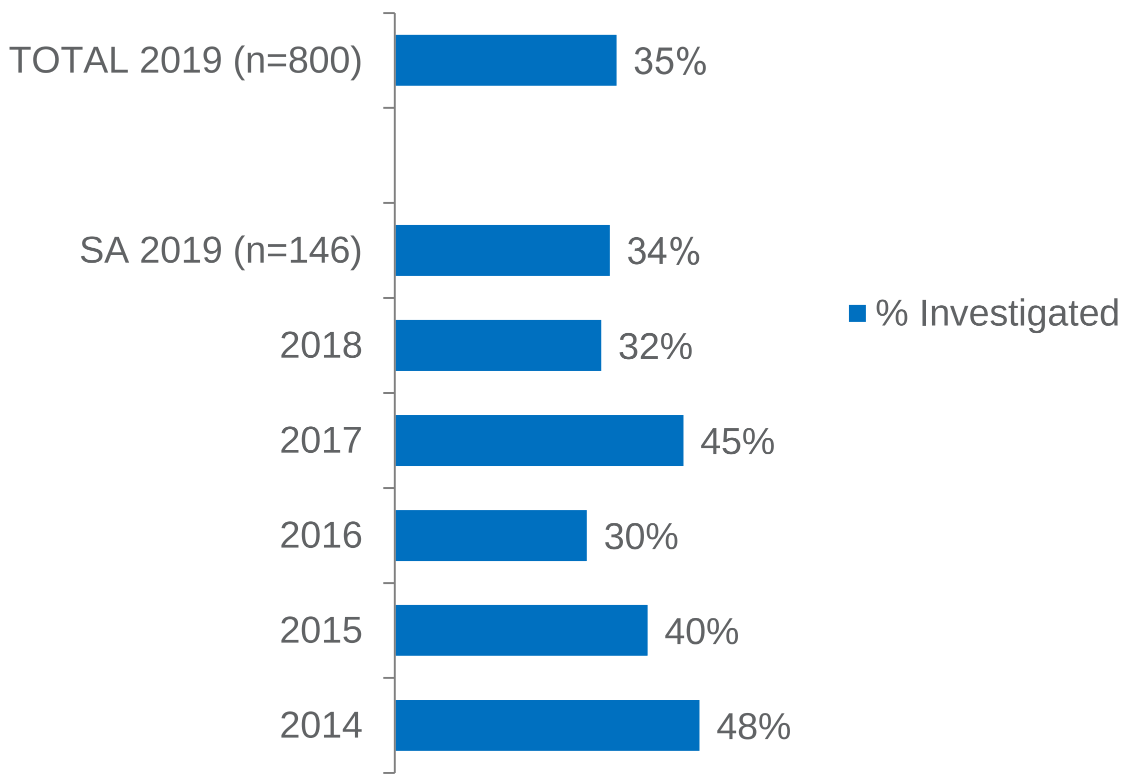


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

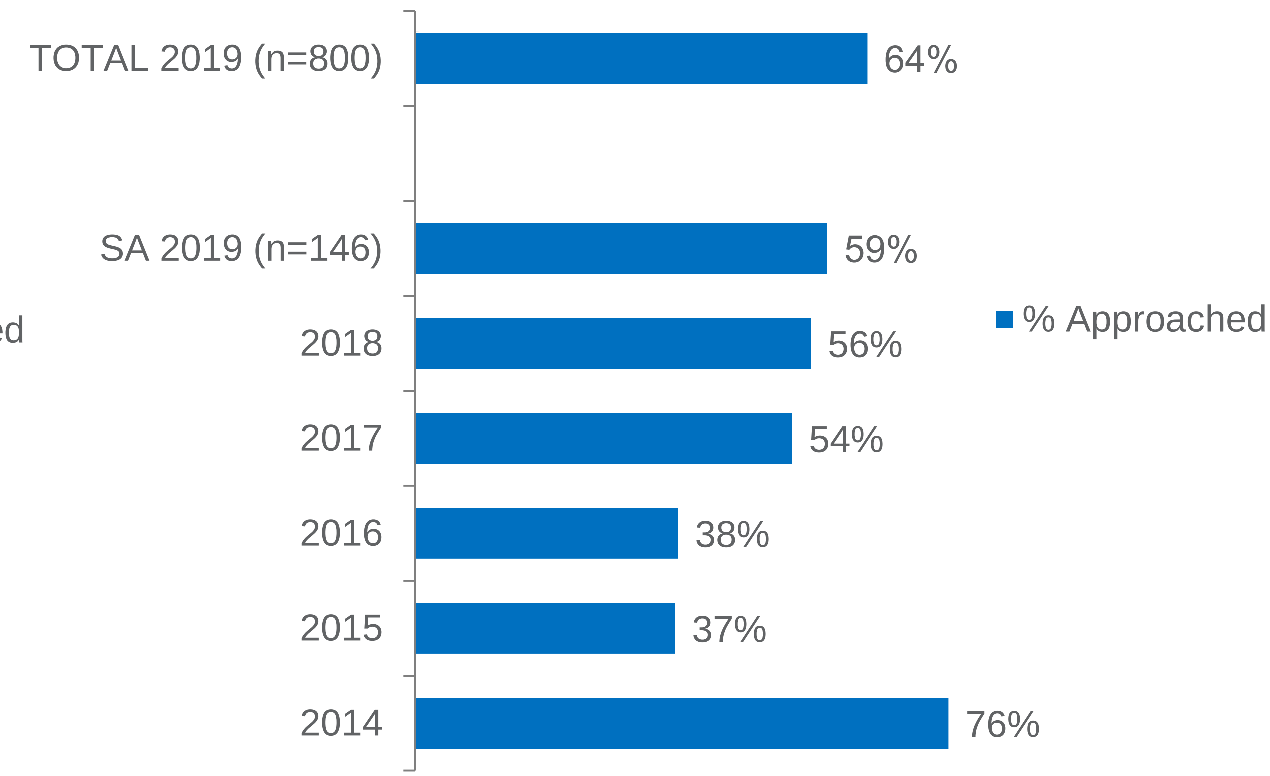
Interaction with alternative energy options / retailers

- Just over a third of SA businesses (34%) in 2019 reported that they have actively investigated different energy options in the past 12 months, representing a small increase from 32% in 2018.
- More than half of SA businesses (59%) in 2019 reported that they were approached by an alternative energy retailer in the last 12 months, slightly higher than the result for 2018 (56%).

Actively investigated different energy options in past 12 months



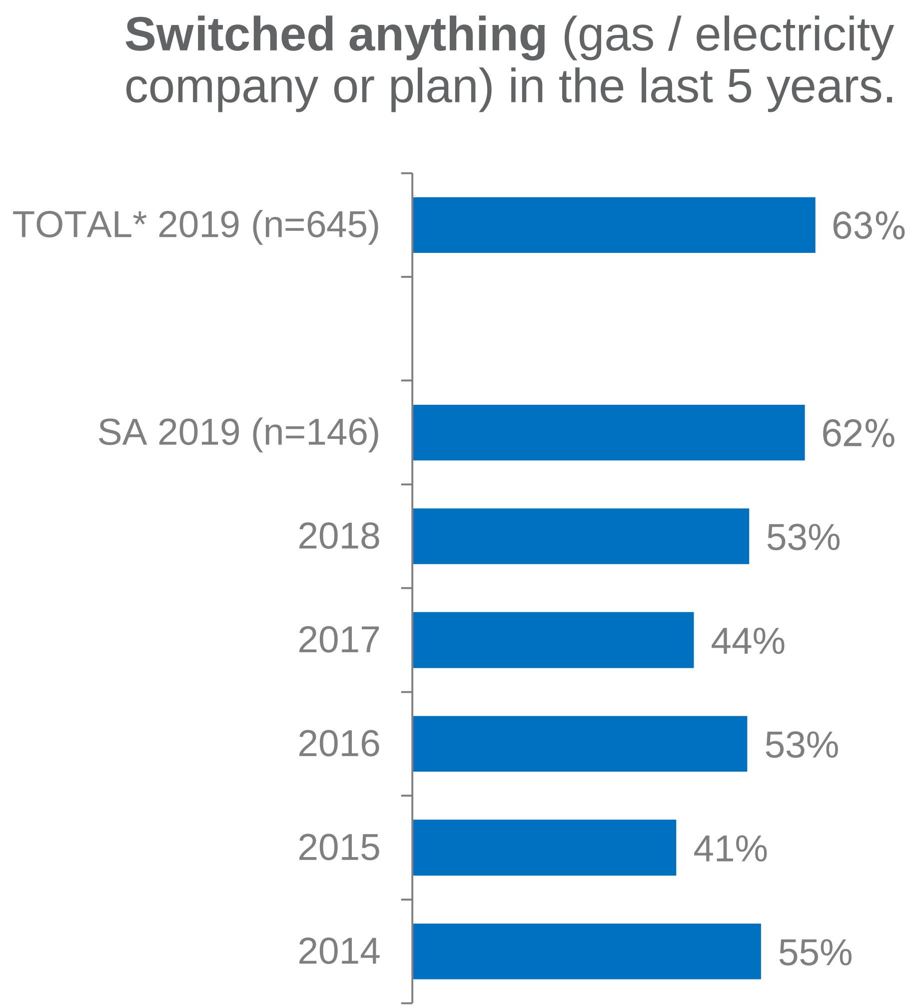
Approached by alternative energy retailer in last 12 months



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 respondents 2019 (n=800). SA participants: 2014 (n=78); 2015 (n=100); 2016 (n=101); 2017 (n=100); 2018 (n=70); 2019 (n=146).

Rates of switching in the last 5 years

- The majority (62%) of SA businesses in 2019 reported switching either their electricity/gas company or plan in the past 5 years; this is the highest figure recorded since the study commenced in 2014.



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); 2019 (n=146).

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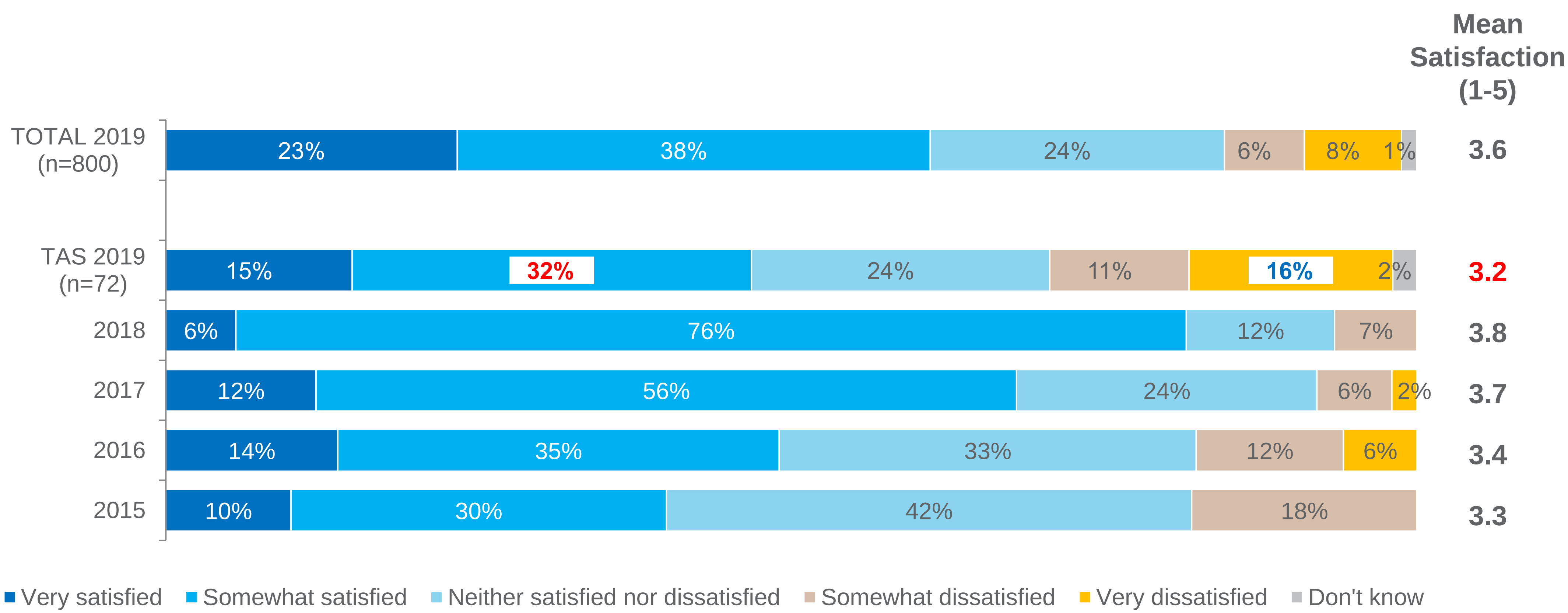
Tasmania

Overall satisfaction with current electricity provider

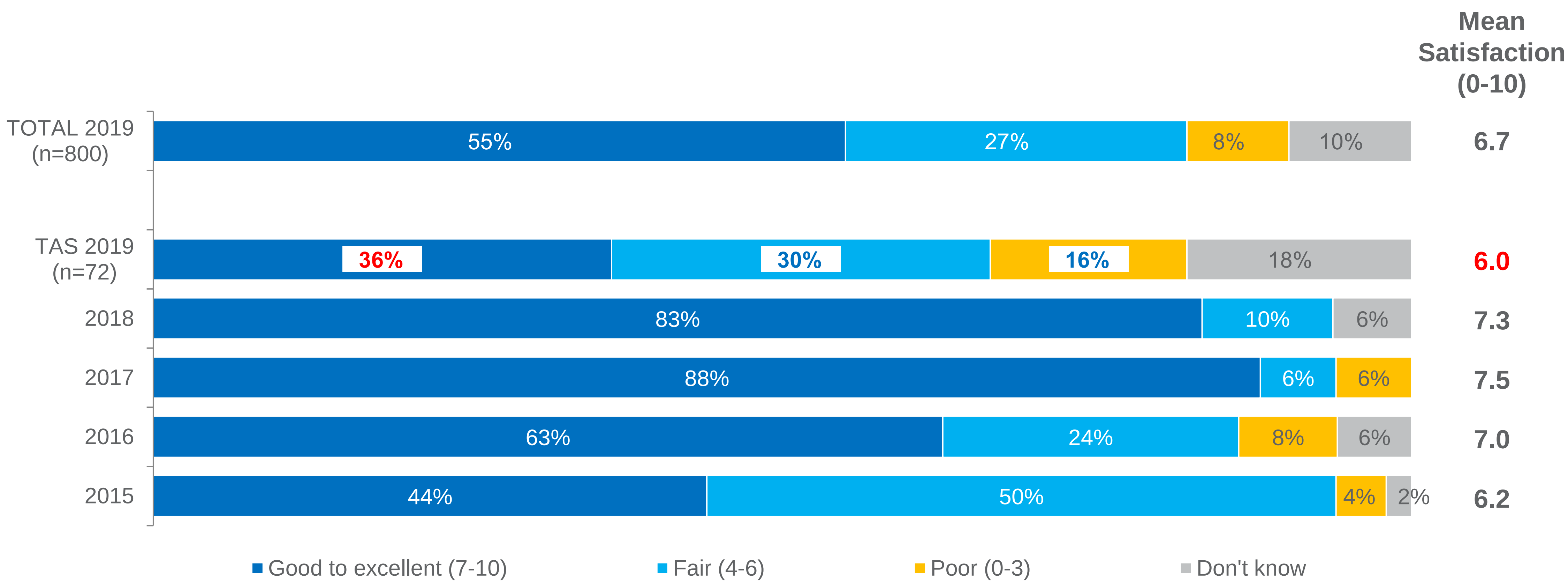
- The average level of satisfaction among TAS businesses with their current electricity provider decrease significantly from 3.8 in 2018 to 3.2 in 2019.
- Further to this, TAS businesses in 2019 were significantly less likely to answer 'somewhat satisfied' (32%, compared to 76% in 2018), and significantly more likely to answer 'very dissatisfied' (16%, compared to 0% 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 respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37); 2019 (n=72).

Satisfaction with customer service among electricity providers

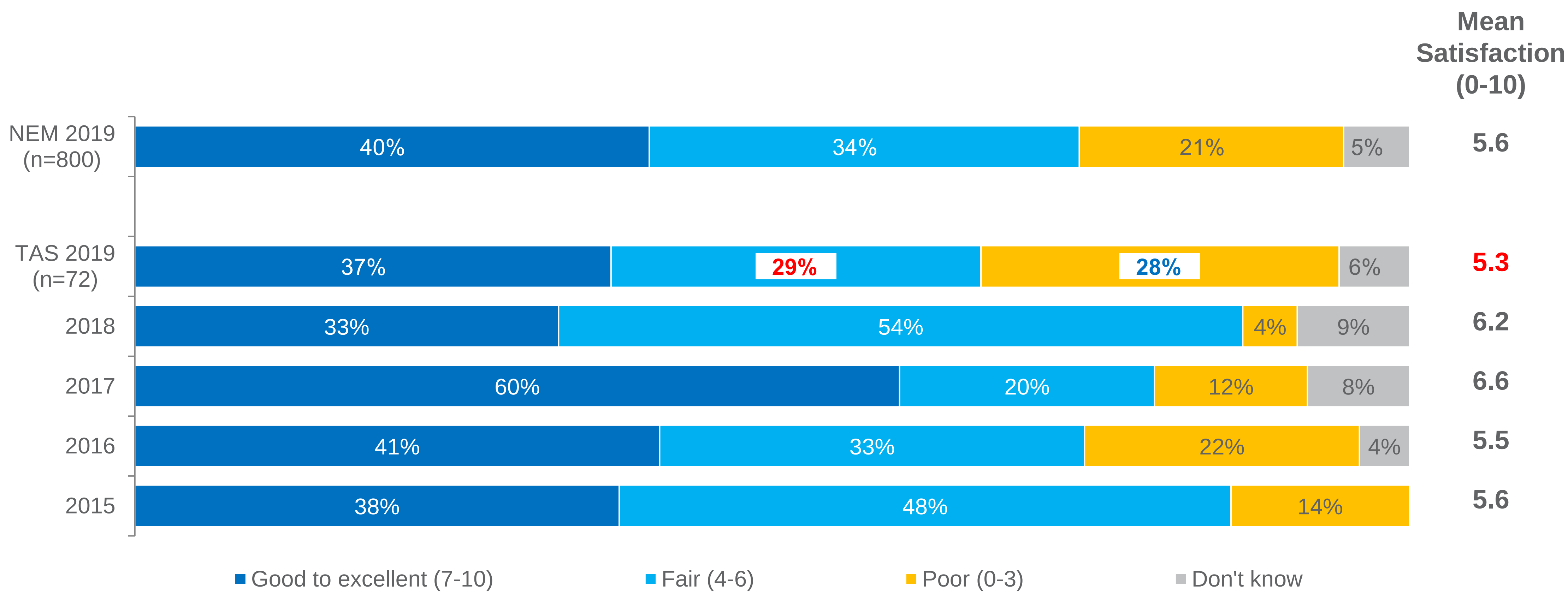
- Average satisfaction with the customer service provided by electricity retailers also decreased significantly from 7.3 in 2018 to 6.0 in 2019.
- TAS businesses in 2019 were significantly less likely to rate the customer service as 'good to excellent' (36%, compared to 83% in 2018), and instead, were significantly more likely to rate it as either 'fair' (30%, compared to 10% in 2018) or 'poor' (16%, compared to 0% 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 respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37) ; 2019 (n=72).

Value for money among electricity providers

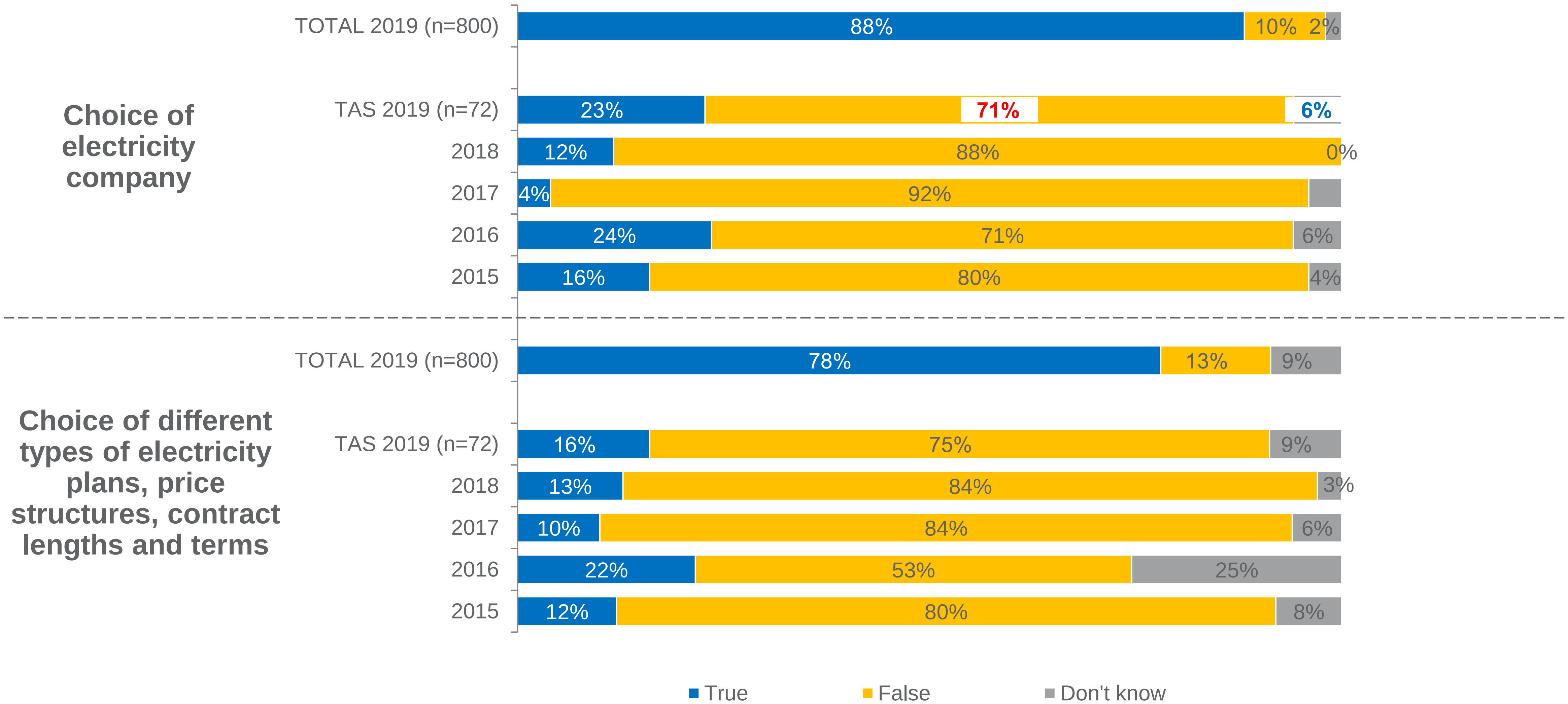
- TAS businesses in 2019 rated the value for money of electricity retailers significantly lower on average in 2019 (5.3) compared to the previous year (6.2 in 2018).
- This was driven by TAS businesses in 2019 being significantly less likely to rate the value for money as ‘fair’ (29%, compared to 54% in 2018), and being significantly more likely to rate it as ‘poor’ (28%, compared to 4% 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 respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37) ; 2019 (n=72).

Perceptions of choice – electricity market

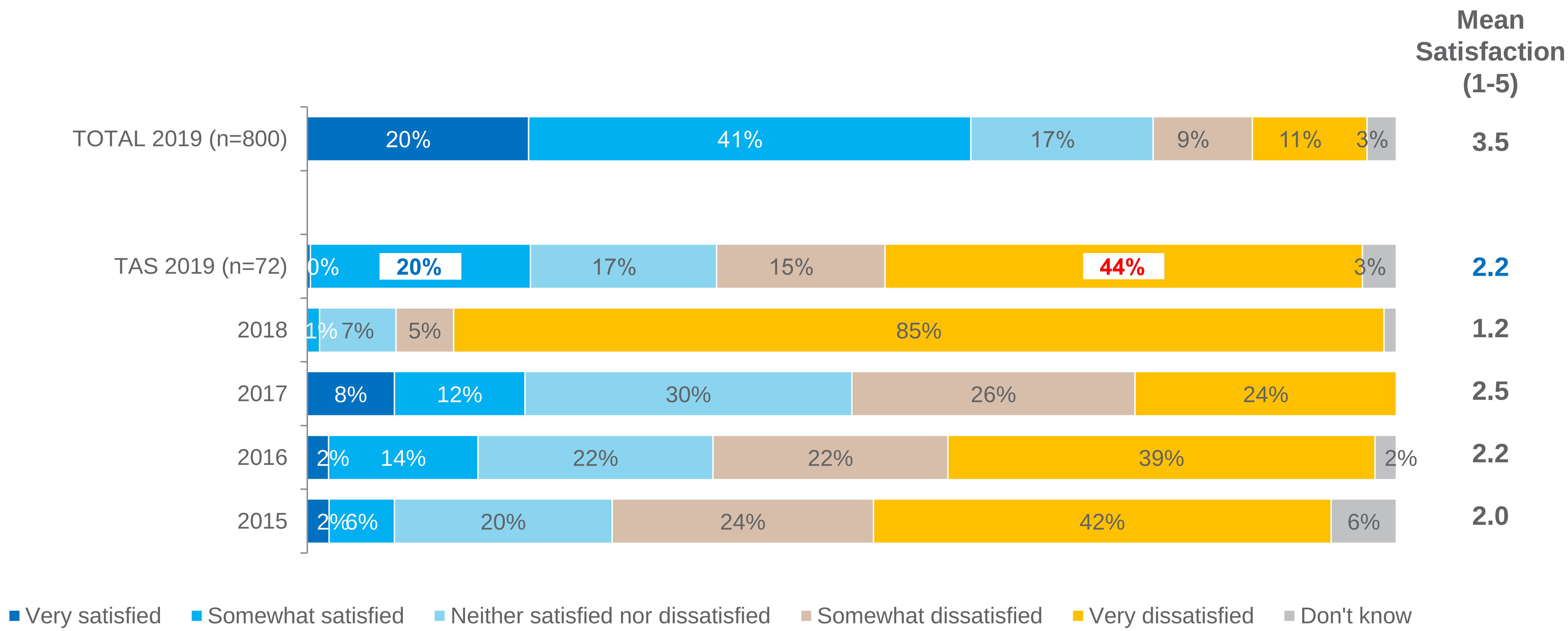
- Almost one in four TAS businesses in 2019 believe they have a choice of electricity company.
- Compared to 2018, TAS businesses in 2019 were significantly less likely to think they do not have a choice of electricity company (71%, compared to 88% in 2018), but were significantly more likely to answer 'don't know' (6%, compared to 0% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37) ; 2019 (n=72).

Satisfaction with choice of energy companies and plans

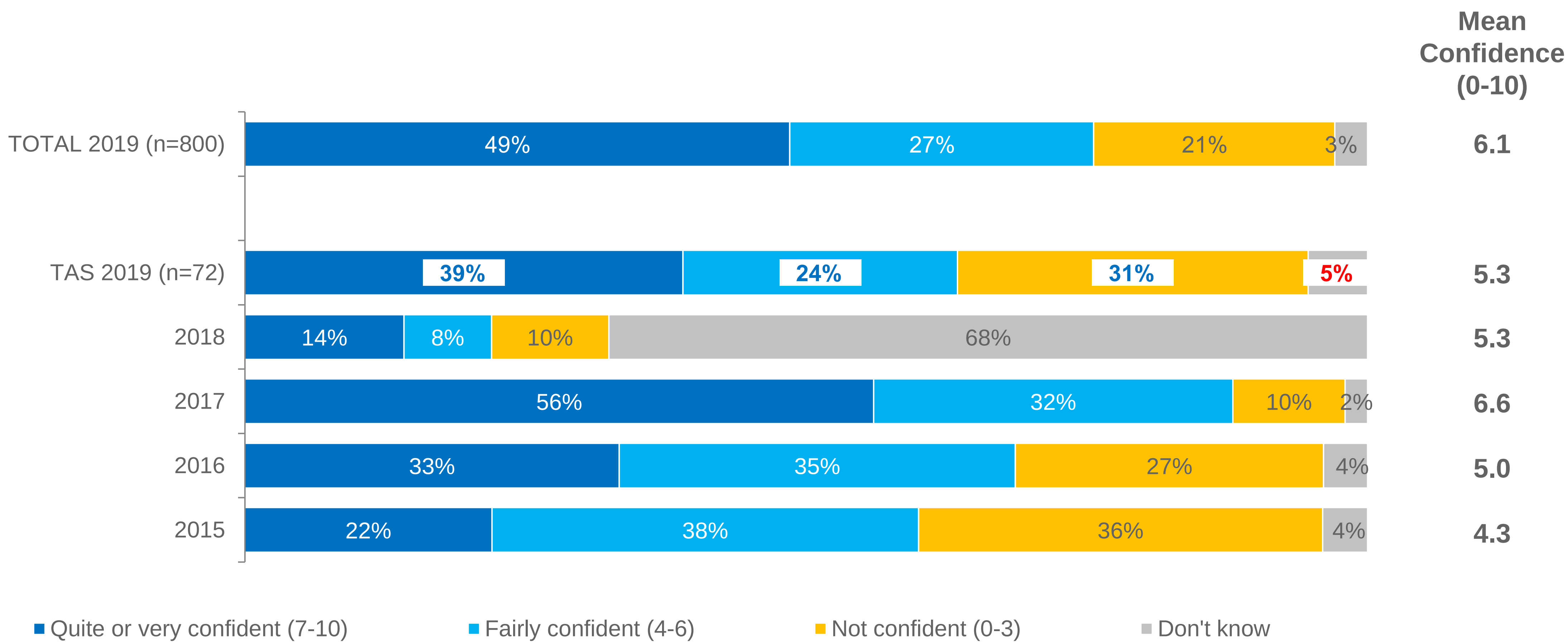
- Despite TAS businesses in 2019 recording a significantly higher mean satisfaction with their choice of energy companies and plans (2.2, compared to 1.2 in 2018), the mean score of 2.2 still remains comparatively lower compared to the total mean satisfaction of all states and regions (3.5).
- Encouragingly though, TAS businesses in 2019 were significantly more likely to be 'somewhat satisfied' (20%, compared to 1% in 2018), and significantly less likely to be 'very dissatisfied' (44%, compared to 85% 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 respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37) ; 2019 (n=72).

Confidence in finding the right information

- There is scope to improve the confidence of TAS businesses in being able to find the right information to help them choose an energy plan, with almost a third (31%) indicating they are not confident and approximately a quarter (24%) are fairly confident.
- The results from 2019 are significantly different to the previous year, however this is skewed by the large proportion of businesses in 2018 who answered ‘don’t know’ (68%).



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 respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37) ; 2019 (n=72).

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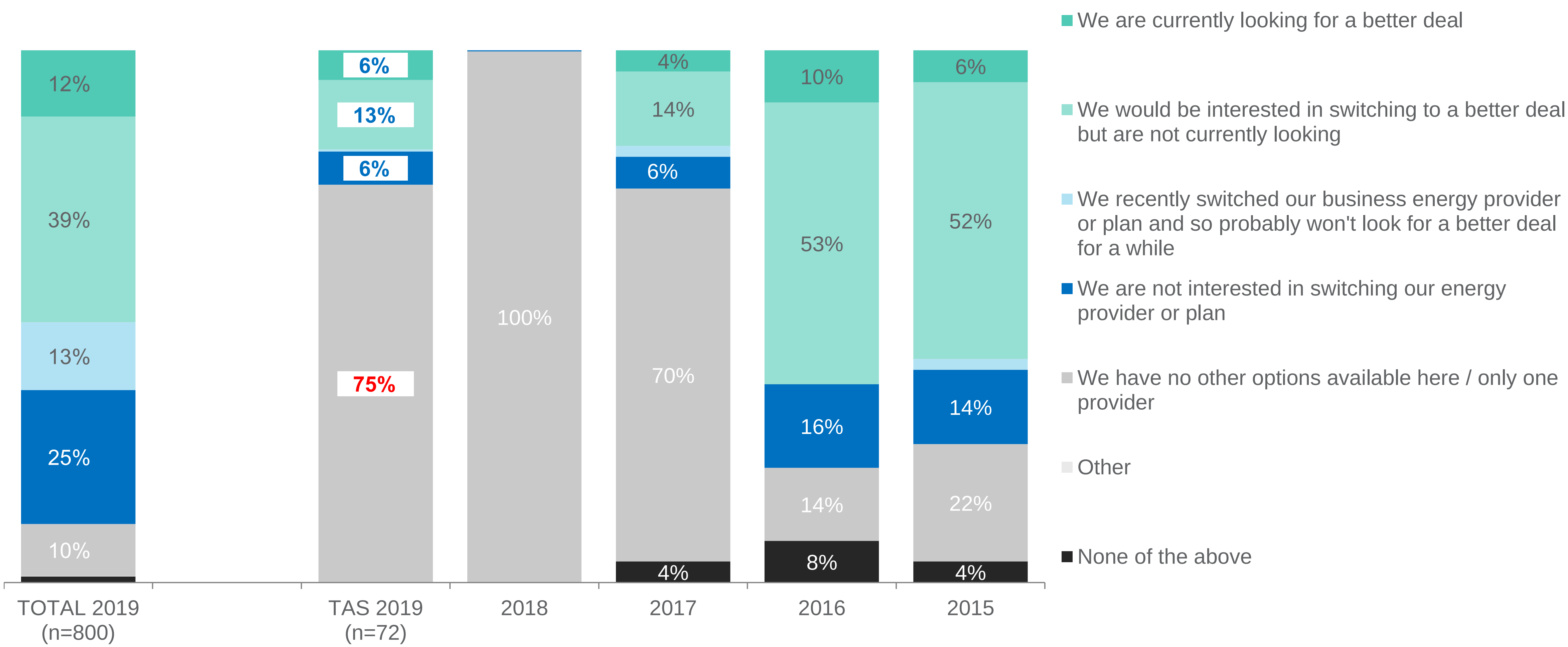
Intentions to switch in the future

- The results from 2019 are significantly different to 2018 results given that almost all TAS businesses in 2018 reported having no other options available or only provider.
- Of note, the 2019 results are very similar to 2017 results.

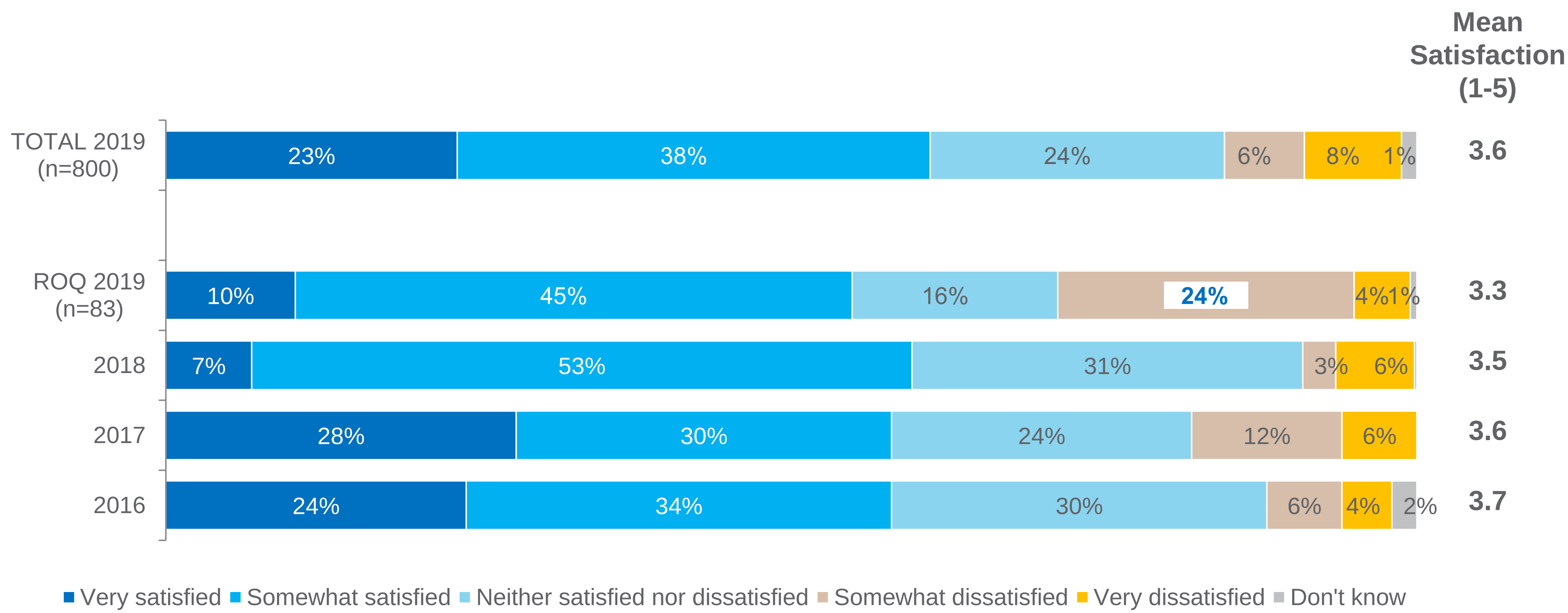


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). TAS participants: 2015 (n=50); 2016 (n=51); 2017 (n=50); 2018 (n=37) ; 2019 (n=72).

Rest of Queensland

Overall satisfaction with current electricity provider

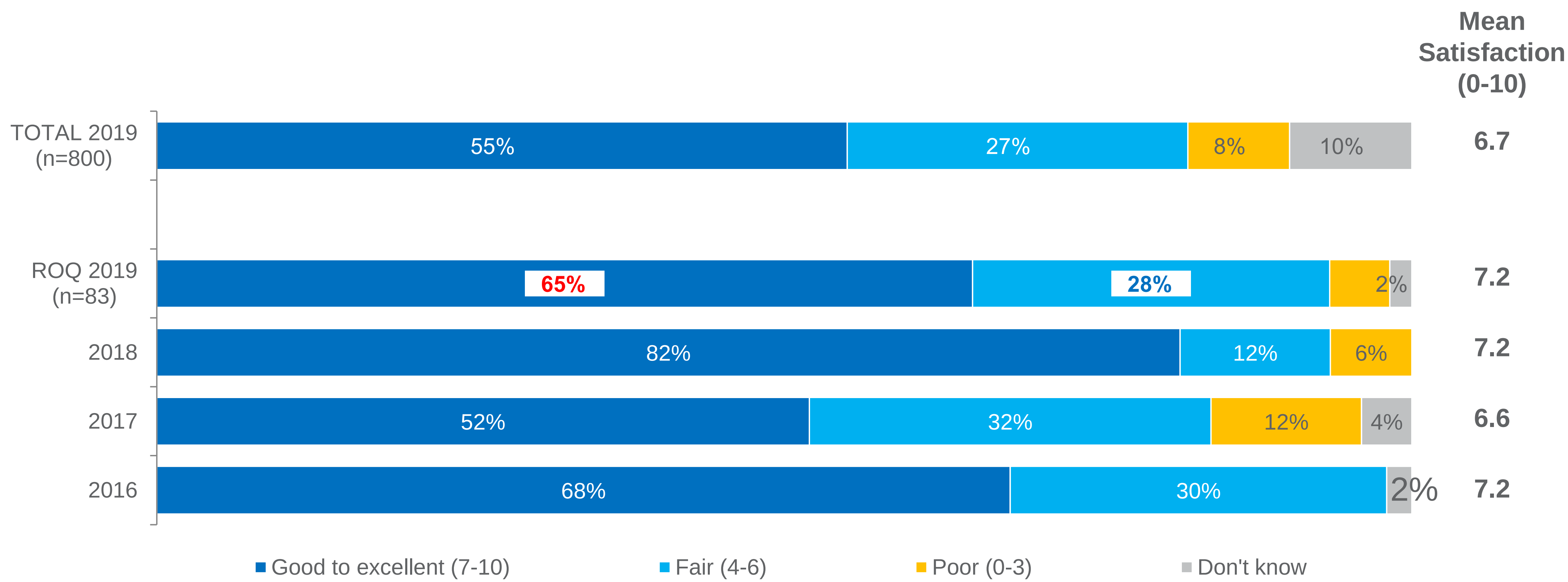
- The average level of satisfaction among ROQ businesses with their current electricity provider has continued to decrease to a new low of 3.3.
- This was driven by a significant increase among ROQ businesses in 2019 who answered that they are 'somewhat dissatisfied' (24%, compared to 3% in 2018).



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 respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Satisfaction with customer service among electricity providers

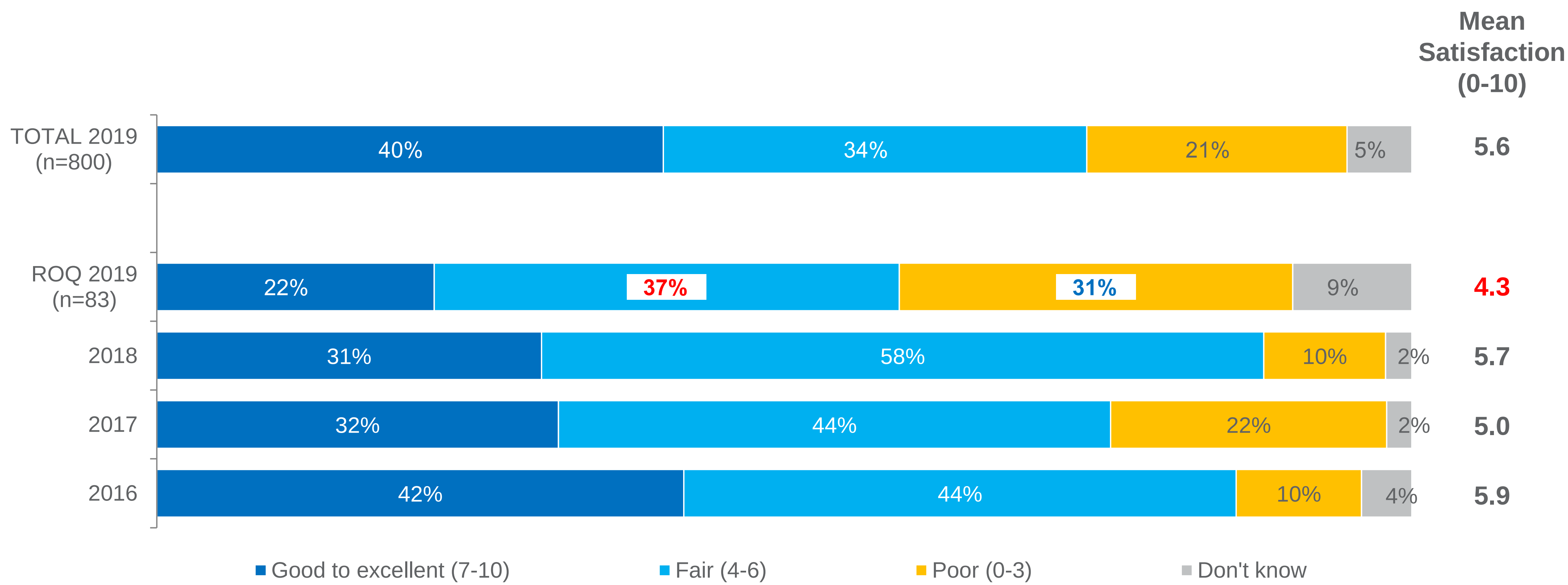
- The average level of satisfaction with the customer service of electricity providers remained consistent in 2019 (7.2 in both 2018 and 2019).
- However there was a shift from rating the customer service as 'good to excellent' to 'fair'; ROQ businesses in 2019 were significantly less likely to rate it as 'good to excellent' (65%, compared to 82% in 2018) and instead, were significantly more likely to rate it as 'fair' (28%, compared to 12% overall).



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 respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Value for money among electricity providers

- ROQ businesses in 2019 rated the value for money of electricity retailers significantly lower on average in 2019 (4.3) compared to the previous year (5.7 in 2018).
- More specifically, ROQ businesses in 2019 were significantly less likely to rate the value for money as ‘fair’ (37%, compared to 58% in 2018) and were significantly more likely to rate it as ‘poor’ (31%, compared to 10% in 2018).

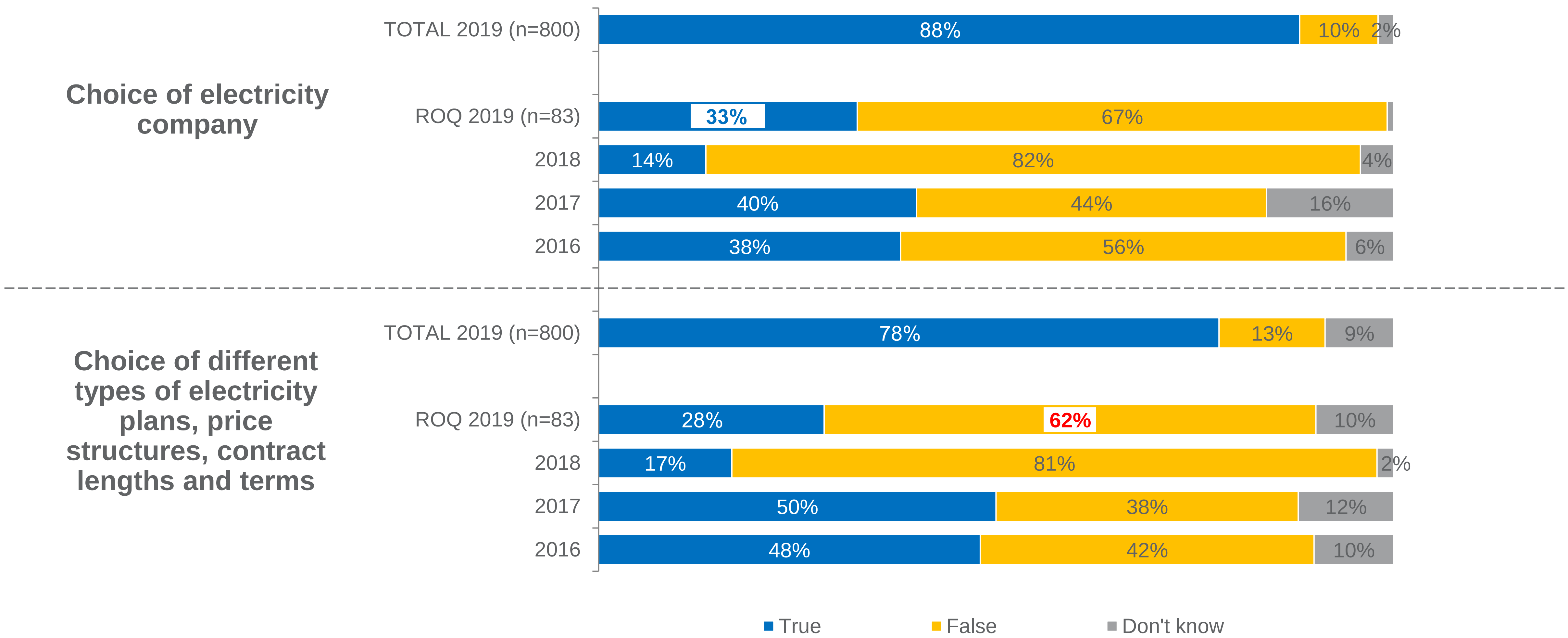


Q4. And using that same scale again, how would you rate the overall <u>value for money</u> of the products and services provided by your business’s [electricity / energy] company?

Base: All respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Perceptions of choice – electricity market

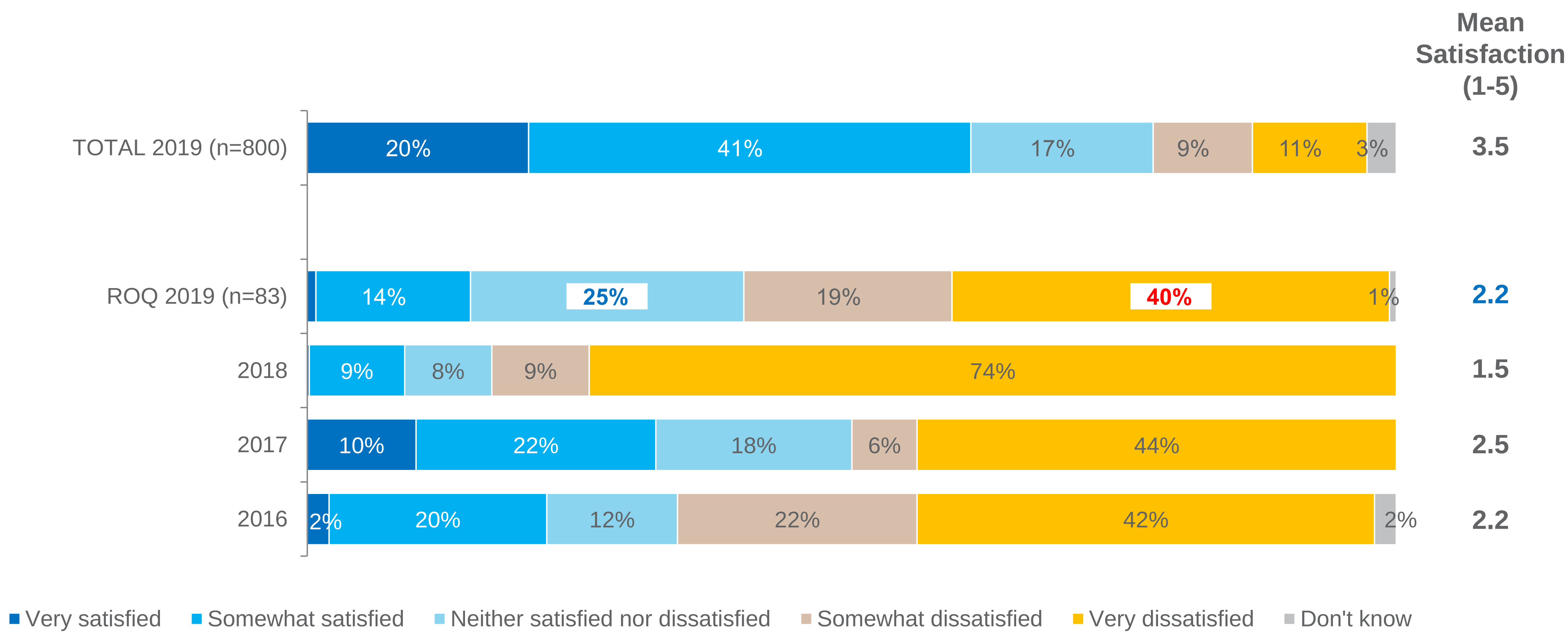
- A third (33%) of ROQ businesses in 2019 believe they do have a choice of electricity company, significantly higher than 14% in 2018.
- ROQ businesses in 2019 were also significantly less likely to think they do not have a choice of electricity plans (62%, compared to 81% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Satisfaction with choice of energy companies and plans

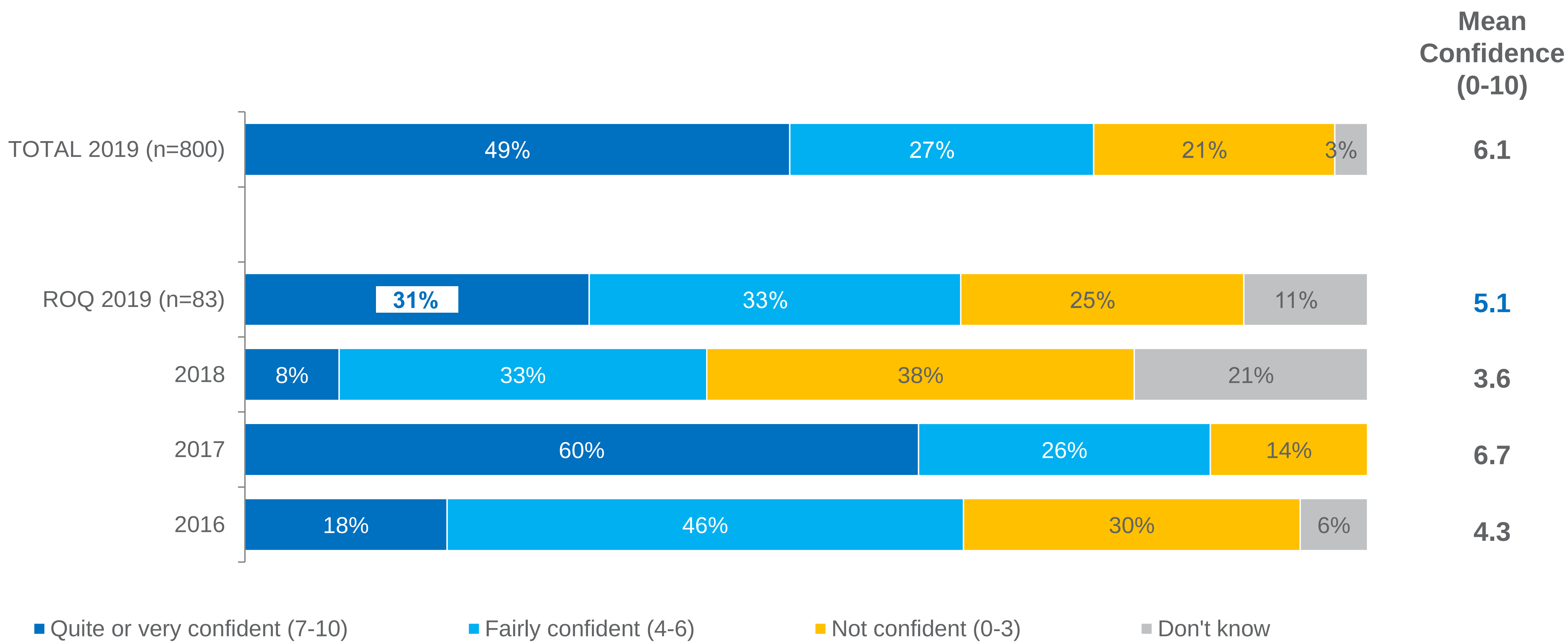
- Although ROQ businesses in 2019 recorded a significantly higher mean satisfaction with their choice of energy companies and plans (2.2, compared to 1.5 in 2018), the mean score of 2.2 still remains relatively lower compared to the total mean satisfaction of all states and regions (3.5).
- ROQ businesses in 2019 were significantly more likely to answer ‘neither satisfied nor dissatisfied’ (25%, compared to 8% overall), and were significantly less likely to answer ‘very dissatisfied’ (40%, compared to 74% overall).



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 respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Confidence in finding the right information

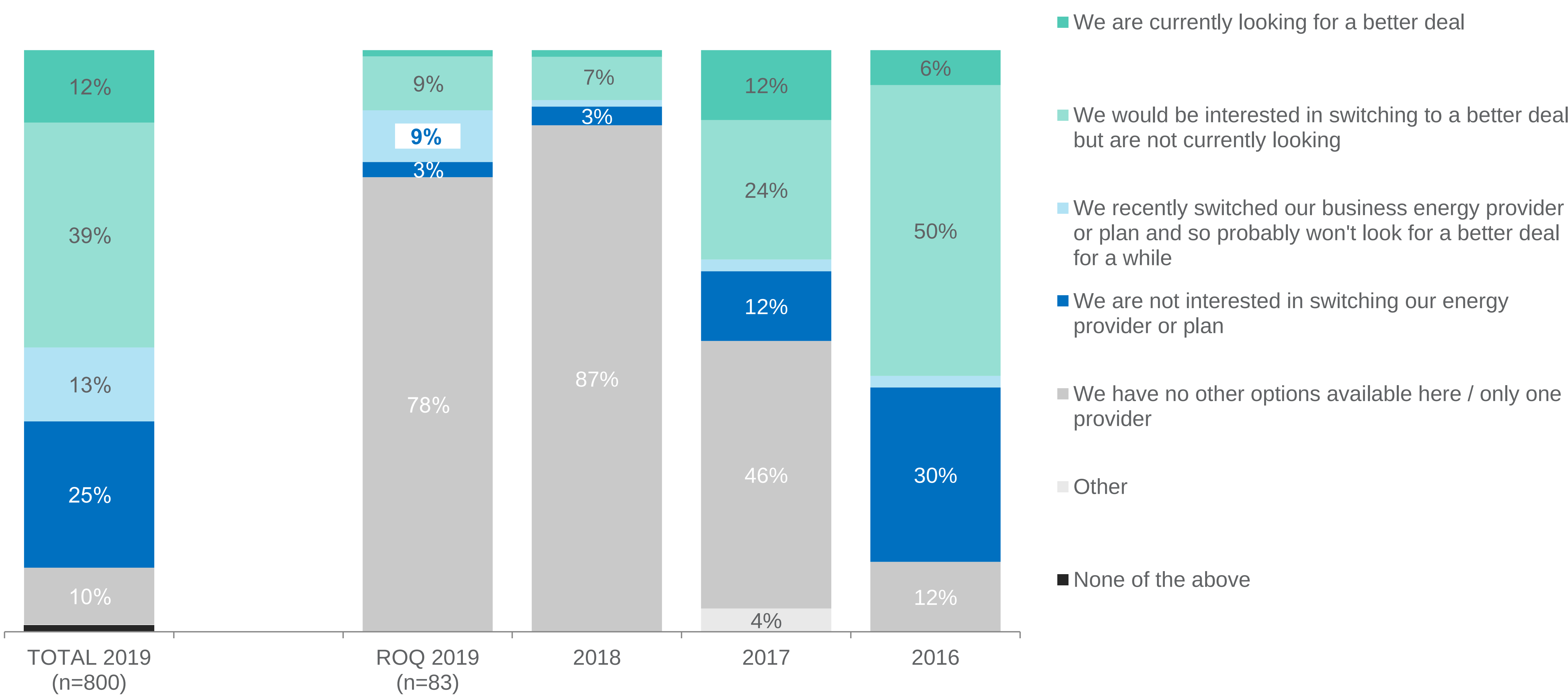
- Almost a third of ROQ businesses in 2019 were quite or very confident in being able to find the right information to choose an energy plan, significantly higher than the 8% recorded for this answer in 2018.
- This positive change is also reflected by the mean level of confidence increasingly significantly from 3.6 in 2018 to 5.1 in 2019.



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 respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Intentions to switch in the future

- ROQ businesses in 2019 were significantly more likely to answer 'we recently switched our business energy provider or plan and so probably won't look for a better deal for a while' (9%, compared to 1% in 2018).
- Similarly to 2018 though, there remains a large proportion (78%) of ROQ businesses who reported having no other options available or only one provider.

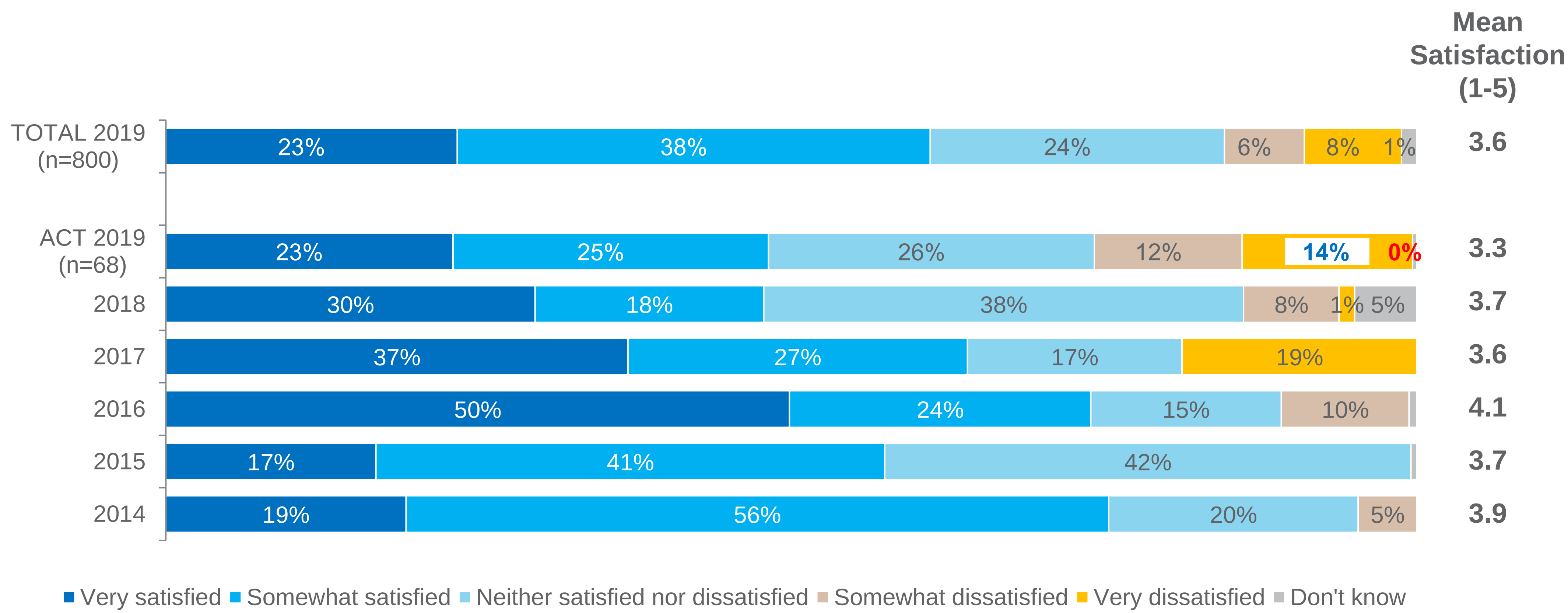


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). ROQ participants: 2016 (n=50); 2017 (n=50); 2018 (n=36); 2019 (n=83).

Australian Capital Territory

Overall satisfaction with current electricity provider

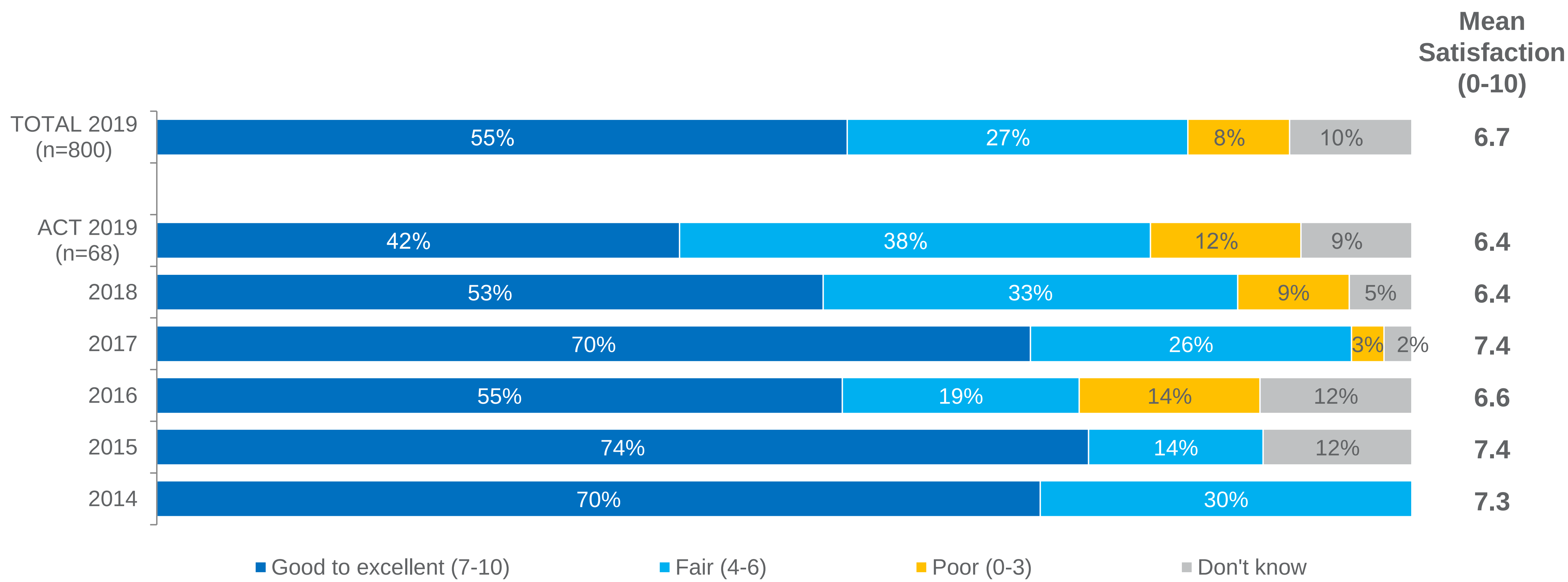
- Among ACT businesses, the average satisfaction with current electricity provider decreased from 3.7 in 2018 to 3.3 in 2019.
- ACT businesses in 2019 were significantly more likely to indicate they are very dissatisfied (14%, compared to 1% in 2018).



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 respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37); 2019 (n=68).

Satisfaction with customer service among electricity providers

- Average satisfaction with customer service remained comparatively low with a mean of 6.4 in 2019; this matches the lowest mean score of 6.4 set 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 respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

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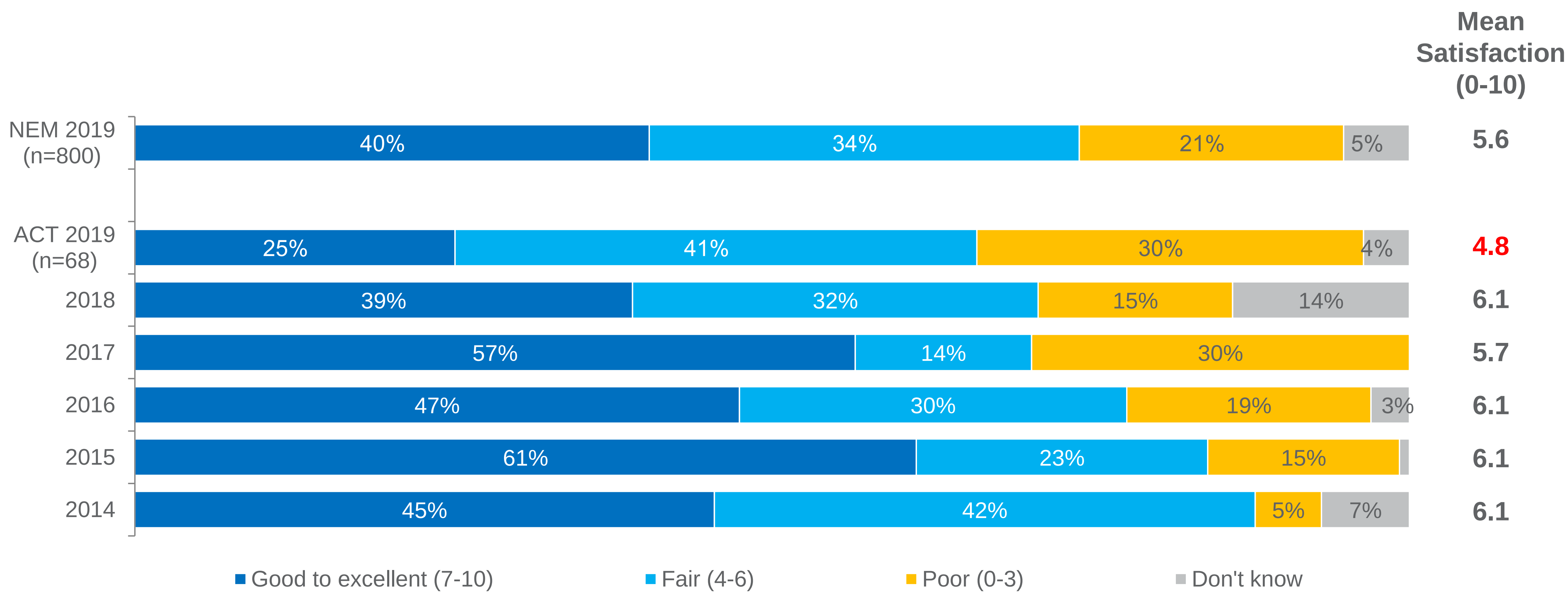
Value for money among electricity providers

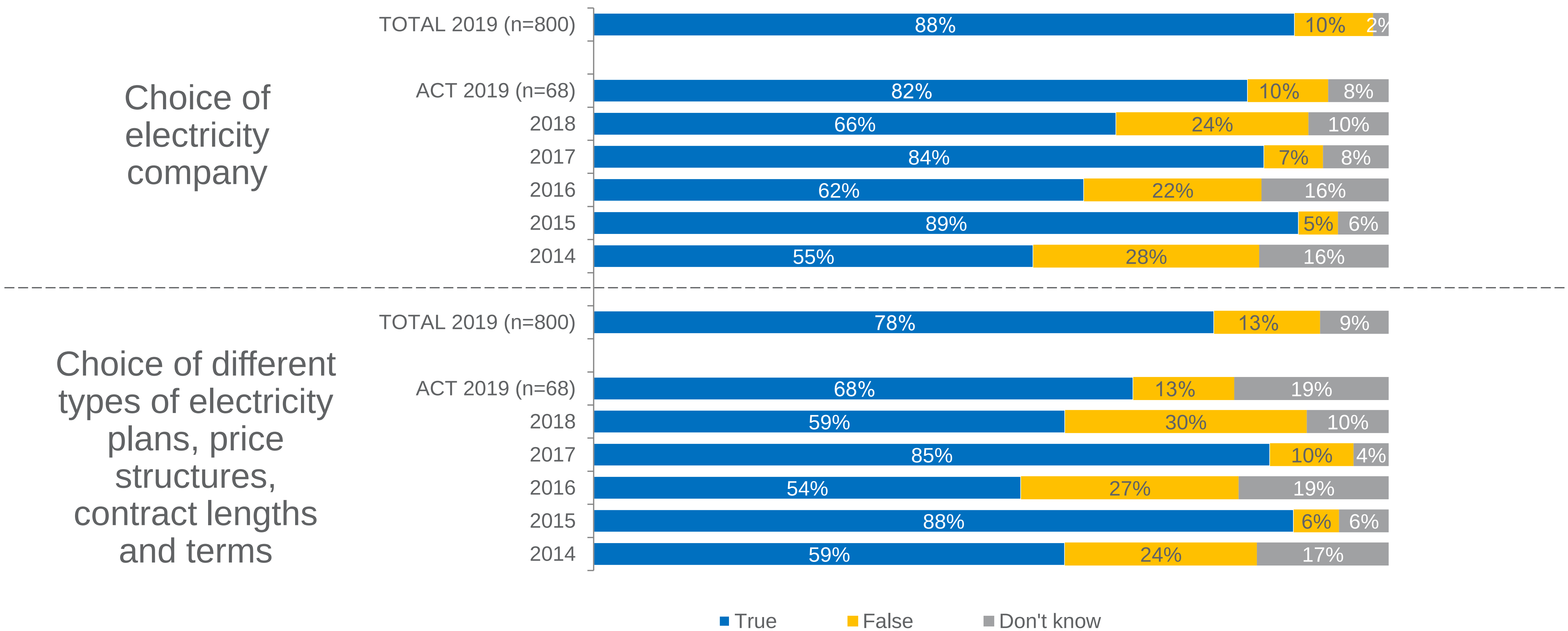
- The perception of electricity providers offering value for money for ACT businesses decreased significantly from 6.1 in 2018 to a new low of 4.8 in 2019.



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 respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

Perceptions of choice – electricity market

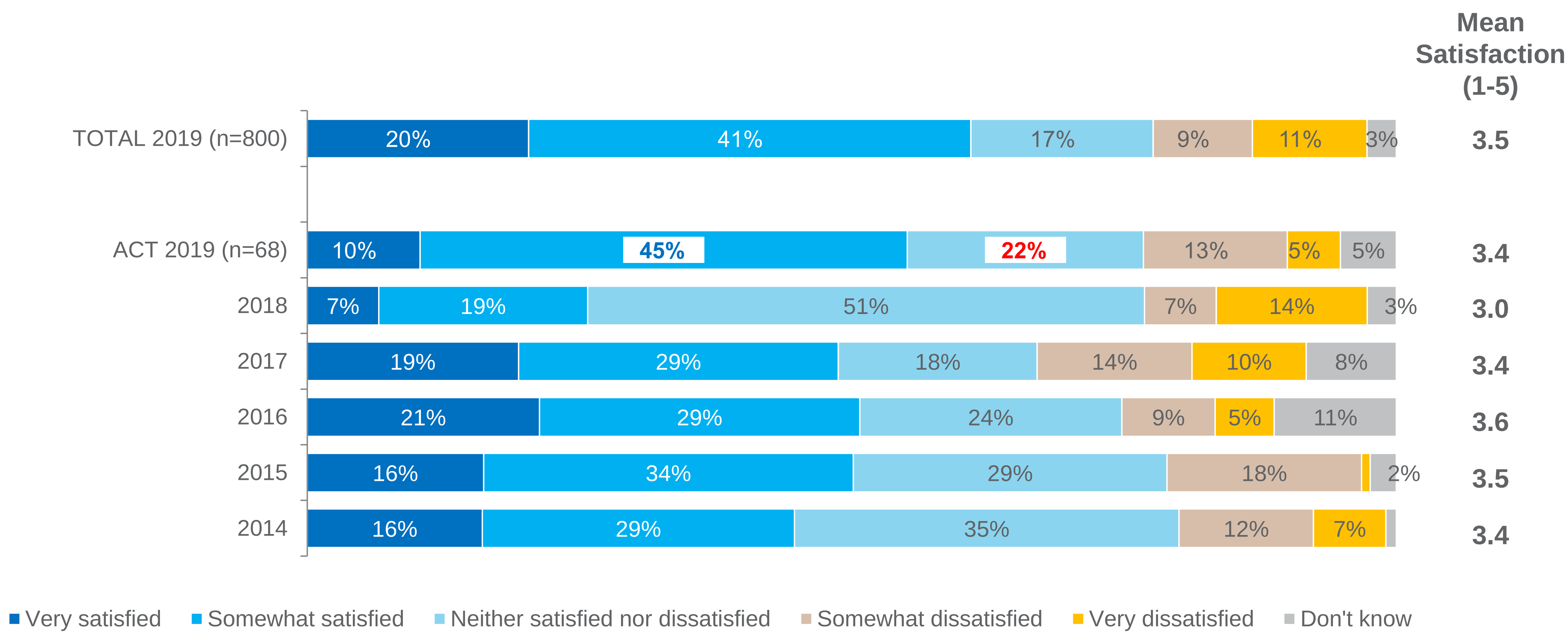
- The majority (82%) of ACT businesses in 2019 believe they have a choice of electricity company, up from 66% in 2018.
- There was also an increase from 2018 in the proportion of ACT businesses who believe they have a choice of electricity plans (68% in 2019, compared to 59% in 2018).



Q13. Please indicate whether you believe each of the following statements to be True or False.
Base: All respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

Satisfaction with choice of energy companies and plans

- On average, ACT businesses in 2019 were more satisfied with the choice of energy companies and plans available to them with a mean of 3.4 (up from 3.0 in 2018).
- More specifically, ACT businesses were significantly more likely to be ‘somewhat satisfied’ (45%, compared to 19% in 2018), and significantly less likely to be ‘neither satisfied nor dissatisfied’ (22%, compared to 51% overall).



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 respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

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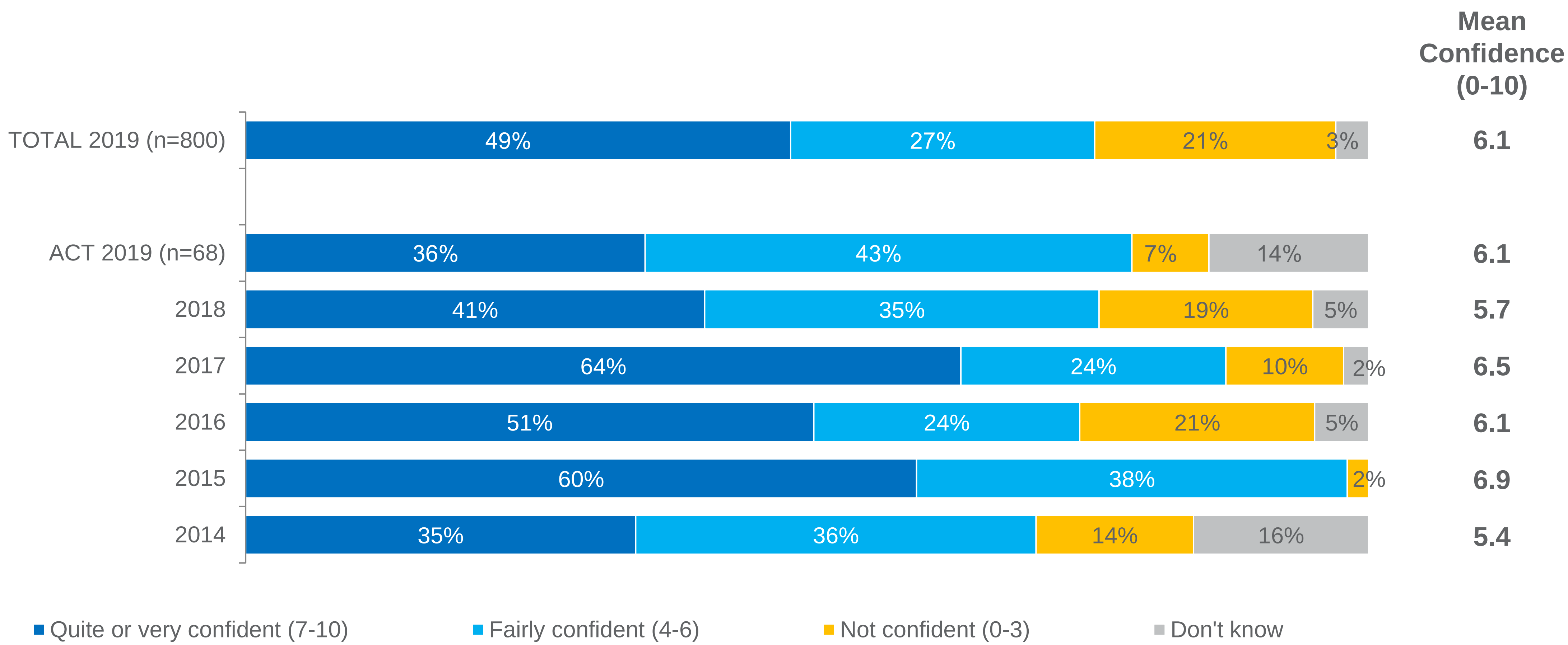
Confidence in finding the right information

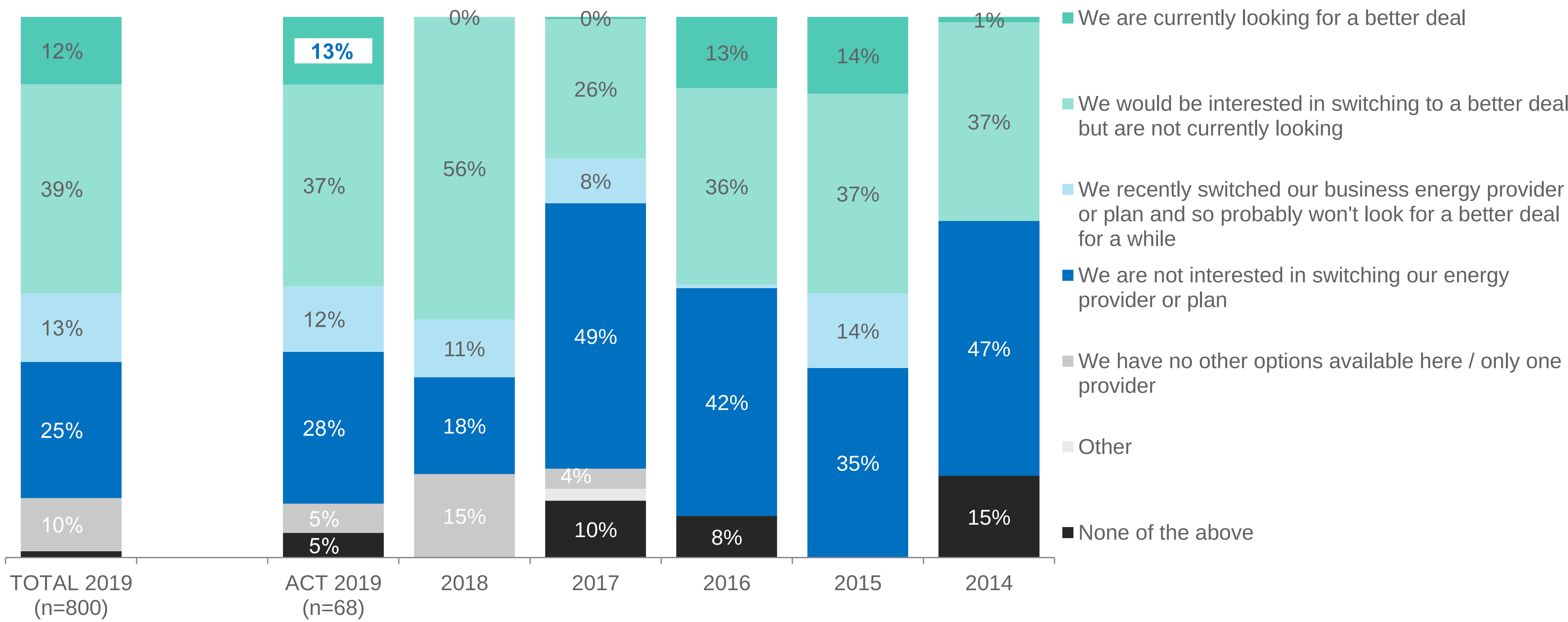
- ACT businesses in 2019 recorded a mean confidence of 6.1 when it comes to finding the right information to help choose an energy plan, representing an increase from 5.7 in 2018.



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 respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

Intentions to switch in the future

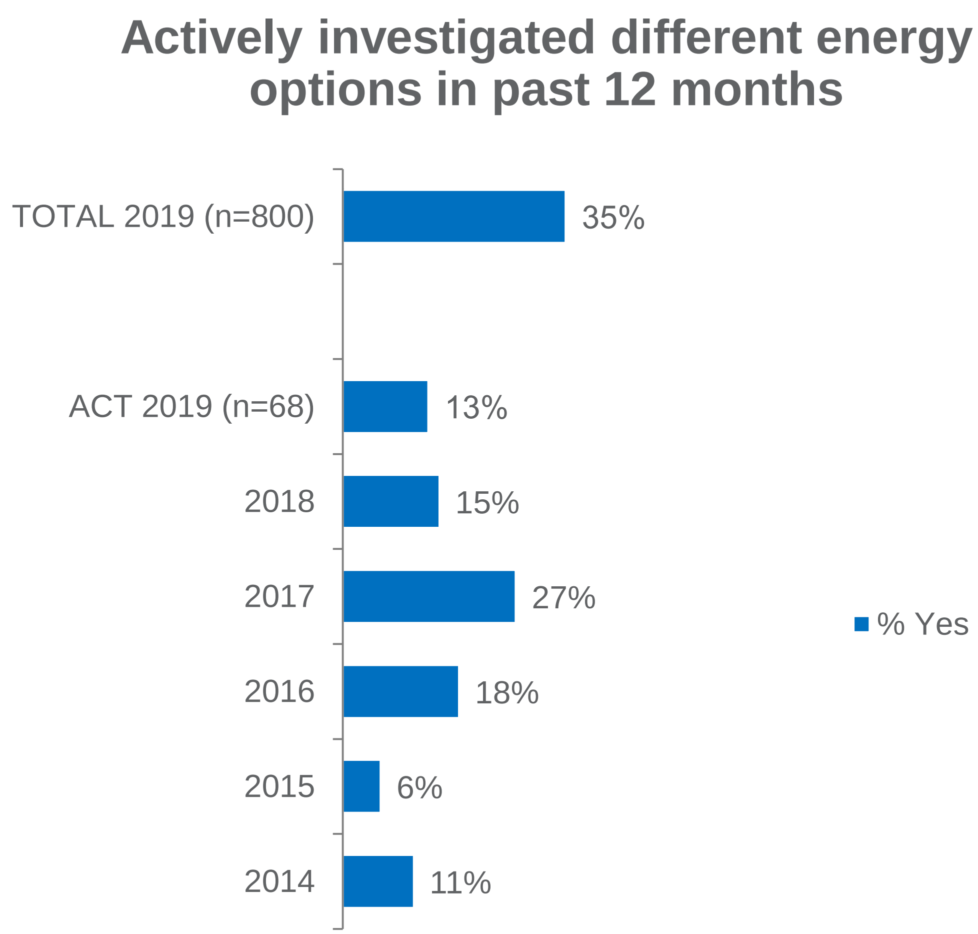
- ACT businesses in 2019 were significantly more likely to report that they are currently looking for a better deal (13%, compared to 0% in 2018).
- However, notably fewer answered that they would be interested in switching to a better deal but are not currently looking (37%, compared to 56% in 2018) – however this was not a statistically significant difference.

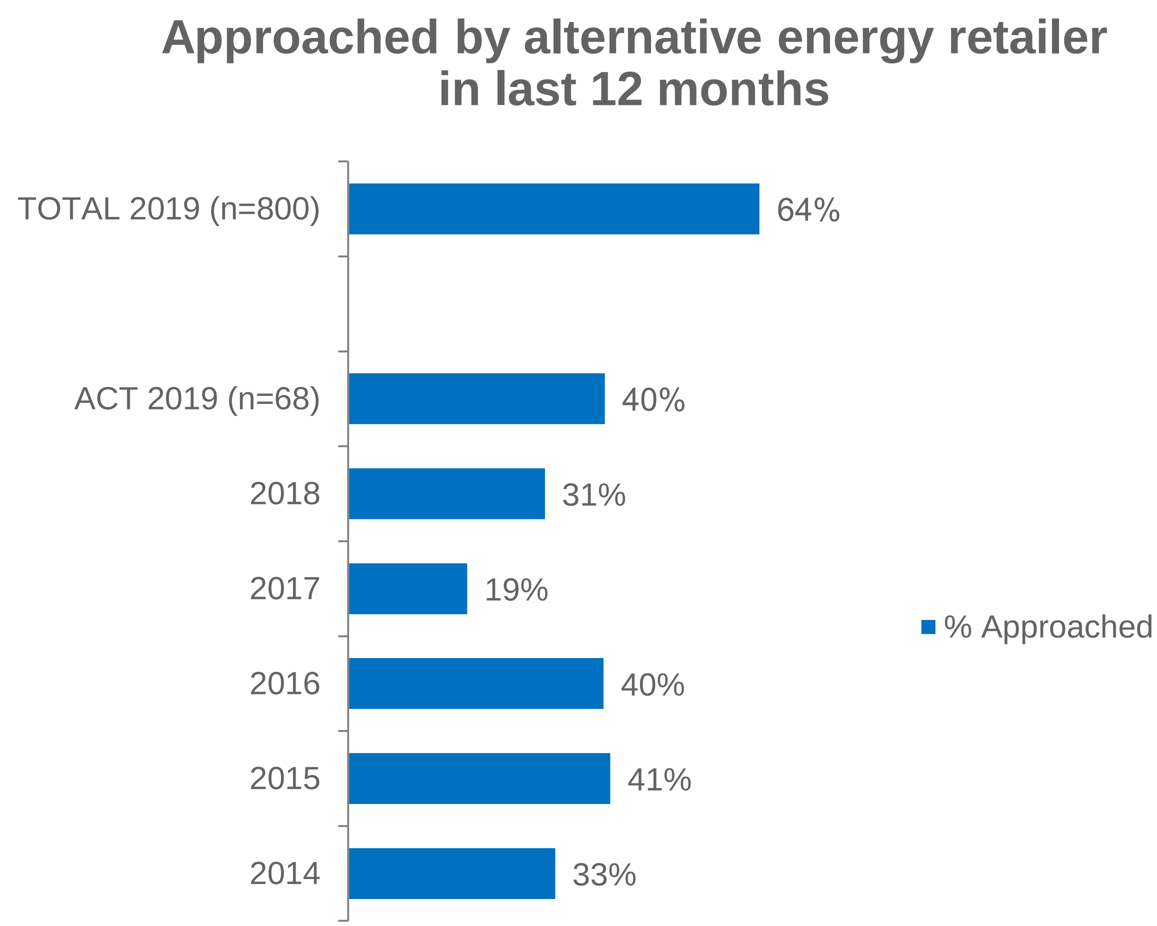


Q34. When it comes to your business's energy company, which one of the following statements is most applicable to your business?
Base: All respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

Interaction with alternative energy options / retailers

- A minority (13%) of ACT businesses in 2019 had actively investigated different energy options, similar to the 2018 figure of 15%.
- 40% of ACT businesses in 2019 reported that they have been approached by an alternative energy retailer in the last 12 months, representing an increase from 31% in 2018.

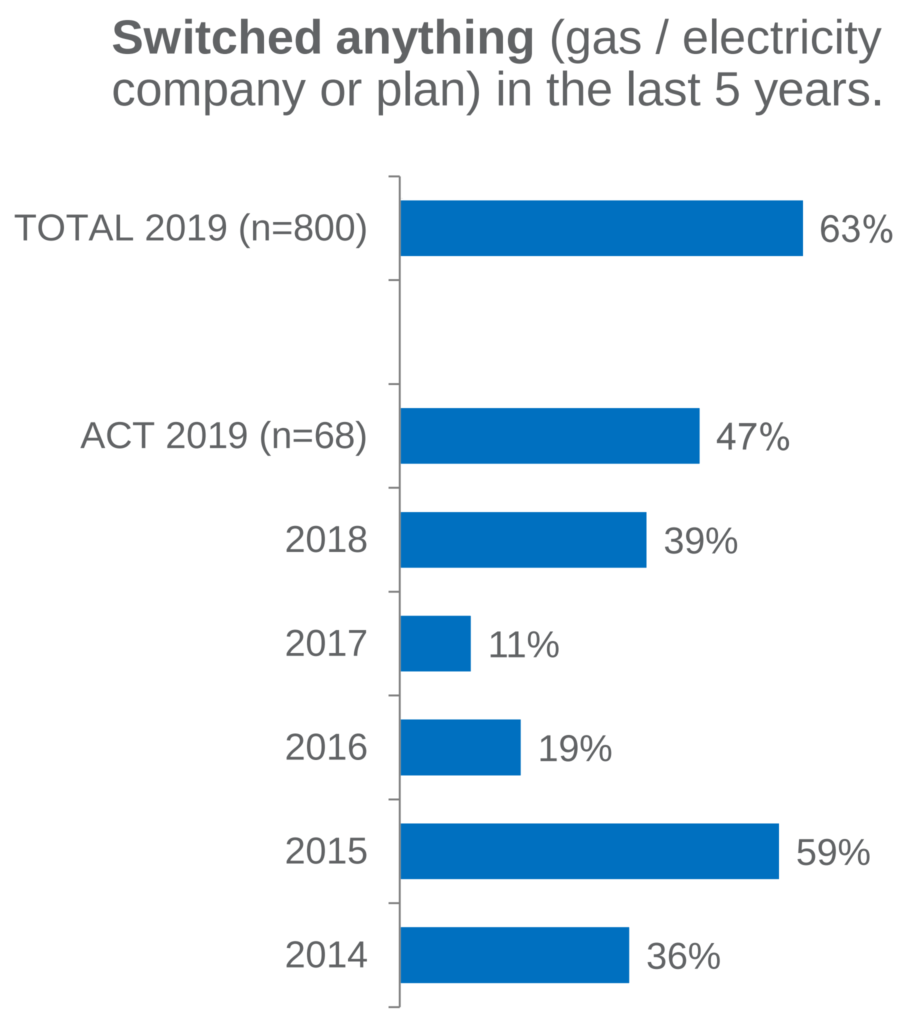




Q20. In the past 12 months, have you actively investigated different energy offers or options that you could potentially switch to?
Q18. In the past 12 months, has your business been approached by an energy company offering to sell you electricity or gas?
Base: All respondents 2019 (n=800). ACT participants: 2014 (n=45); 2015 (n=50); 2016 (n=50); 2017 (n=49); 2018 (n=37) ; 2019 (n=68).

Rates of switching in the last 5 years

- Almost half (47%) of ACT businesses in 2019 have switched either their electricity/gas provider or plan in the past 5 years.
- This switching rate is at its highest since 2015 (59% switched anything).



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); 2019 (n=68).

Appendix A – Data Weighting

Distribution of final CATI sample by business size and location

	Non-employing	1-4 employees	5-19 employees	20-199 employees
Sydney	10% 13	13% 34	9% 26	13% 17
Other NSW	8% 10	10% 27	6% 17	5% 6
ACT	10% 13	5% 12	10% 28	12% 15
Melbourne	13% 17	12% 32	14% 39	14% 18
Other VIC	6% 8	8% 20	3% 7	4% 5
Brisbane	8% 10	13% 35	14% 38	12% 16
Other South East Queensland	5% 7	5% 14	4% 10	4% 5
Rest of Queensland	8% 10	12% 32	11% 31	8% 10
Adelaide	13% 17	10% 26	19% 51	14% 18
Other SA	4% 5	6% 17	4% 10	2% 2
Hobart	10% 13	4% 10	3% 8	8% 10
Other TAS	5% 7	2% 6	4% 10	6% 8
Total	**100% 130**	**100% 265**	**100% 275**	**100% 130**

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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%	-	**-**

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 to 2019 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	14.11%	1.63%	**8.68**	6.93%	4.25%	**1.63**	1.74%	3.25%	**0.53**	0.48%	2.13%	**0.23**
Other NSW	8.48%	1.25%	**6.78**	4.41%	3.38%	**1.31**	1.40%	2.13%	**0.66**	0.28%	0.75%	**0.37**
ACT	0.82%	1.63%	**0.50**	0.40%	1.50%	**0.27**	0.13%	3.50%	**0.04**	0.04%	1.88%	**0.02**
Melbourne	13.09%	2.13%	**6.16**	5.23%	4.00%	**1.31**	1.56%	4.88%	**0.32**	0.44%	2.25%	**0.19**
Other VIC	5.98%	1.00%	**5.98**	2.69%	2.50%	**1.08**	0.78%	0.88%	**0.90**	0.15%	0.63%	**0.25**
Brisbane	6.09%	1.25%	**4.87**	2.62%	4.38%	**0.60**	0.86%	4.75%	**0.18**	0.23%	2.00%	**0.11**
Other SE QLD	3.35%	0.88%	**3.82**	1.40%	1.75%	**0.80**	0.43%	1.25%	**0.34**	0.09%	0.63%	**0.15**
Rest of QLD	4.16%	1.25%	**3.33**	1.73%	4.00%	**0.43**	0.65%	3.88%	**0.17**	0.15%	1.25%	**0.12**
Adelaide	3.49%	2.13%	**1.64**	1.12%	3.25%	**0.34**	0.43%	6.38%	**0.07**	0.11%	2.25%	**0.05**
Other SA	1.32%	0.63%	**2.11**	0.56%	2.13%	**0.26**	0.21%	1.25%	**0.16**	0.04%	0.25%	**0.15**
Hobart	0.47%	1.63%	**0.29**	0.19%	1.25%	**0.16**	0.08%	1.00%	**0.08**	0.02%	1.25%	**0.02**
Other TAS	0.66%	0.88%	**0.75**	0.29%	0.75%	**0.38**	0.12%	1.25%	**0.10**	0.03%	1.00%	**0.03**

Appendix B – Questionnaire

QMS ONLINE QUESTIONNAIRE
Australian Energy Market Commission
SME Survey

Project No: AEMCCC0098	**Project Name**: Small business (SME) survey
Main Client Service Contacts: Corey Fisher	
Other Client Service Team Members: Edward McCarthy	
Issue Date: 25/02/19	

Introduction

Good morning / afternoon / evening, my name is [**SAY NAME**] and I'm calling on behalf of Action Market 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 call the Australian Energy Market Commission to verify this research you can call (02) 8296 7800 and ask to speak to James Hyatt.

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)

NEW QUESTIONS

QD13. Is this business operated from a residential home? **SINGLE RESPONSE, READ OUT**	1. Yes 2. No 3. Don't know

IF QD13=YES, CONTINUE TO QD14 BELOW. OTHERWISE SKIP TO D2a below.

QD14. Is this business currently on a residential plan for your electricity usage, or a business plan? **SINGLE RESPONSE, READ OUT**	1. Residential plan 2. Business plan 3. Don't know

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

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 quality of customer service provided by your business's electricity company? 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 energy company? 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

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 gas company? 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 can choose their electricity company	1	2	3
b. **IF HAS GAS (Q5=1)** Businesses in your state or territory can choose their gas company	1	2	3
c. Businesses in your state or territory 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 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**	

Q46. **QUESTION REMOVED IN 2017**	

ASK ALL

Q65. Do you know if or when your current 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

ASK IF HAVE MAINS GAS (Q5=1)

Q74. Do you know if or when your current 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

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? **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 was it different 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

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. 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** Q17.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** **<u>DO NOT</u> RANDOMISE 1-4**	1. Your electricity <u>company</u> _ _ 2. From one <u>electricity plan</u> or deal to another offered by the same electricity company _ _ 3. **IF HAS GAS (Q5=1)** Your gas <u>company</u> _ _ 4. **IF HAS GAS (Q5=1)** From <u>one gas plan</u> 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 important 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

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 energy 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?	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
DO NOT READ OUT, RECORD BEST FIT **MULTIPLE RESPONSE OK**	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**	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)_______ 23. Don't know
Q33. **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** **MULTIPLE RESPONSE OK**	24. No particular reason 25. Too busy / too much hassle / couldn't be bothered 26. **[MERGED WITH 2 IN 2018]** 27. Too confusing 28. Lack of information on best deals available 29. They are all the same / no significant price differentiation 30. **CODE REMOVED IN 2017** 31. **CODE REMOVED IN 2017** 32. No other options / alternatives available 33. I am on a contract 34. **CODE REMOVED IN 2017** 35. **CODE REMOVED IN 2017** 36. **[MERGED WITH 6 IN 2018]** 37. My existing company matched the offer / gave me a better offer so I stayed with them 38. Happy with current retailer / arrangement / plan **39. CODE REMOVED IN 2017** **40. CODE REMOVED IN 2017** 41. I don't trust what the energy companies say **42. CODE REMOVED IN 2017** **43. 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]** **44. CODE REMOVED IN 2017** 29. Did not want to pay reconnection fees 45. Other (specify)_______ 46. Don't know

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

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? **DO NOT READ OUT, RECORD BEST FIT**	1. I wouldn't look for information 2. Brochures, pamphlets 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.

MULTIPLE RESPONSE OK, RECORD FIRST MENTION	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 47. 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	1. Already have 2. Definitely will 3. Probably will 4. Might 5. Probably won't 6. Definitely won't

SINGLE RESPONSE FOR EACH, REPEAT SCALE AS NEEDED	

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

Closing

That is all of my questions. Just to remind you, my name is **[INSERT INTERVIEWER NAME]** from XXX. 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 **[INSERT PHONE NUMBER]**. Thank you again for your time.