Roy Morgan Research

Survey of Business Customers of Electricity and Natural Gas in New South Wales: Effectiveness of Retail Competition

- Prepared for -

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1. EXECUTIVE SUMMARY

The objective of the study was to assist the AEMC in their review of competition in the electricity and gas retail markets for residential customers in New South Wales. Whether retail competition is found to be present or not, it will lead to various courses of action, e.g., further promoting competition if it is found to be absent or weak, or removing regulations/controls if competition is flourishing.

Five hundred and nine representatives of businesses in New South Wales were surveyed online in December 2012 - January 2013 to learn of their attitudes and behaviours regarding their use of electricity and gas and the retail companies that supply the services to the businesses. Mains gas users comprised approximately 20% of the sample and everyone (except for one) stated they were electricity users. Key findings of the study were:

- More than 90% were aware they had a choice of electricity and gas suppliers.
- AGL was the retailer for a majority of gas users (56%). Overall, three companies had a very strong presence in the retail marketplace: AGL, Energy Australia, and Origin. Nevertheless, businesses were able to name alternatives to the companies they use.
- Nearly 70% of the sample said they had been approached by an electricity company offering to sell the service; the rate for gas was only half that. One to five approaches per year was the norm. About 30% of businesses had actively sought out information from electricity retailers compared to approximately 20% for gas.
- Information received as a result of electricity and gas sales encounters was not rated highly. Material was unclear and of limited usefulness for decision making. The information was rated slightly more favourably when businesses sought it out for themselves.
- Pricing issues dominated the reasons why business customers investigated the switching of retail providers and dominated the reasons given for a switch after it has been carried out. Customer service issues, new products/technologies/services were rarely mentioned.
- About half of the participants had switched electricity companies in the last 10 years, and a quarter had switched gas companies that often. Most had switched only once during that time. Switching was generally an unproblematic process and a majority were satisfied with the new company.
- Satisfaction with the current supplier and inertia were the primary reasons mentioned for not switching electricity or gas retailers. Switching was viewed as "too complex"

for electricity more so than for gas. "Lower prices" figured strongly as the incentive that would entice businesses to switch in the future. Twenty percent had plans to switch electricity or gas companies in the next 12 months. Those who did have such plans relied on internet searches and price comparisons sites for information.

- Only 15% of businesses had changed energy arrangements with their present retailer. Satisfaction and inertia were again cited as the reasons for not making such changes.
- Eight in ten business customers reported never experiencing any unethical or unfair practices by their energy retailers. The 20% who had were spread across a variety of categories (e.g., 7% were told things about terms and conditions of contracts that did not prove to be true). Only 11% had ever lodged a complaint about the energy retailer and about 3 in 10 businesses had contacted their energy retailer in the past year.
- Across the issues and topics mentioned some differences were observed on demographic variables such as business location (metro vs. non-metro) or bill amount. For example, metro businesses were more likely to say they had a choice of electricity retailer than in non-metro areas. Metro businesses received more total sales calls from gas retailers than non-metro businesses. Businesses that received higher electricity bills were more likely to make an approach to energy companies to buy electricity.

Overall, the study provides significant support for the presence of energy retail competitiveness for NSW businesses. No significant barriers were identified that blocked switching or impeded comparison of competitor offers. Efforts by retail energy companies to improve the clarity and usefulness of sales literature would likely be appreciated by business customers.

2. INTRODUCTION

2.1 Background and Objectives

Retail competition in the electricity and natural gas markets has been operating in New South Wales for just over a decade. What is the current state of competition as judged by small-scale residential and business energy users? What are their attitudes and actions in regard to these energy supplies and suppliers?

The Australian Energy Market Commission (AEMC) is concerned with these questions. It was established in July 2005 by the Council of Australian Governments, through its Ministerial Council on Energy (MCE). The AEMC is responsible for rules and policy advice covering the National Electricity Market (NEM) and aspects of the natural gas markets.

The AEMC is empowered by the Australian Energy Market Agreement (AEMA) to carry out reviews of retail competition in the energy markets across the country, including the commissioning of consumer research. The first review was conducted in Victoria in 2007. South Australia and the ACT followed in 2008 and 2010 respectively. The current study of NSW is thus the fourth in the series.

According to the AEMA, the aim of the competition reviews is to assess the effectiveness of competition in the electricity and gas retail markets for the purpose of the retention, removal, or reintroduction of retail energy price controls.

Upon review of the data, the AEMC will recommend ways to:

- Phase out price controls if competition is found to be effective; or
- Promote competition where competition is found to be less than effective.

The assessment is required to be conducted on the basis of criteria developed by the MCE in consultation with the AEMC and other stakeholders. The criteria focus on:

- Independent rivalry within the market
- Ability of suppliers to enter the market
- The exercise of market choice by customers
- Differentiated products and services
- Price and profit margins
- Customer switching

2.2 Roy Morgan Research's Role

Roy Morgan Research was commissioned by the AEMC in November 2012 to carry out quantitative and qualitative research with "small customers" of natural gas and/or electricity in New South Wales. Three studies were undertaken:

- Qualitative focus groups with business and residential energy users of electricity and gas.
- A quantitative survey of 1000 residential energy customers across NSW.
- A quantitative survey of 500 business energy customers.

Focus groups reveal attitudes held and behaviours undertaken by people as expressed in their own voice. They explore the reasons and motivations behind energy-related actions and beliefs. The focus groups look in depth at a small number of people. The quantitative method complements the qualitative by examining a larger number of people to learn, broadly speaking, what percentage of the population holds various views and engages in certain actions with respect to the energy market.

This report focuses on only the third item listed, the quantitative phase with businesses using electricity and gas. Separate reports will be issued on the quantitative survey of residential consumers and a qualitative analysis of attitudes drawn from four focus groups held in metro and non-metro New South Wales. Taken together, the reports provide customer input to the AEMC's review of the retail energy marketplace in NSW relating to the established criteria described above.

2.3 Research Considerations

The approach taken to this aspect of the required NSW research was guided by the following considerations:

- There were two target groups of interest: small-scale[1] business users of electricity and small-scale business users of mains natural gas in New South Wales.
- A survey was requested using a "statistically significant" sample size by energy type and network provider.

[1] For purposes of the screening, "small scale" use of electricity and gas by businesses was defined in terms of annual energy expenditure. The electricity amount had to be $40,000 per annum or less ($3,333/m) and the natural gas expenditure had to be $17,000 per annum or less ($1,416/m).

The topics of interest for the survey included:

- Awareness of competition and opportunities to choose and switch energy retailers;
- The extent to which the respondent switches energy retailers or considers switching (and the reasons for that switching behaviour);
- The extent to which small-scale business customers respond to retailer marketing activities;
- The ease of obtaining, understanding and comparing information about energy options;
- Attitudes to products offered by energy retailers;
- Understanding and use of “time of use” pricing;
- Changes of attitudes and behaviour since 2002 when full retail contestability commenced in NSW;
- Demographic questions such as business location (metro vs. regional), age, gender, etc. which may enrich an analysis of perceived competiveness in the electricity and gas markets.

3. METHODOLOGY

3.1 Sample size/methodology

A target was established of 500 completed surveys from businesses in NSW. The method of data collection involved Computer Assisted Web Interviewing (CAWI). The maximum margin of error for such a sample is ±4.4%. An online survey approach was taken for several reasons:

- Privacy- Attitudes toward energy retailers or services which the business respondent may be reluctant to mention when others can listen in on a telephone call are private when answered online;
- Convenience- Business people are often “time poor.” The online survey could be completed when it fitted into the respondent’s schedule, not the telephone interviewer’s schedule.

Sampling quotas were established for business location based on state region. For this, we used the boundaries set in NSW government planning documents[2] that guide development initiatives. The 18 regions are shown in Table 1 next to the most recently available

[2] See http://www.2021.nsw.gov.au/regions

population figures and the business sample quotas. Assignment rules were set up so that the sample represented the state regions proportionately. Area quotas were used in part to ensure that all network providers of energy services in NSW were covered. There were seven metro (M) and 11 non-metro (NM) areas. Survey data have been aggregated across the regions; data on individual network providers have not been collected or reported.

Table 1. Geographical regions used for quotas[3]

NSW 2021 Regions	18+ Pop (Jun-12)	Sample
Central Coast (M)	258,232	**23**
Central West (NM)	156,307	**14**
Eastern/Inner Sydney (M)	804,463	**70**
Far West (NM)	19,797	**2**
Hunter (NM)	518,669	**45**
Illawara (NM)	345,932	**30**
Mid North Coast (NM)	207,626	**18**
Murray/Lower Darling (NM)	91,101	**8**
New England North West (NM)	147,504	**13**
Northern Sydney (M)	485,382	**42**
Northern Beaches Sydney (M)	199,948	**17**
Northern Rivers (NM)	235,101	**21**
Orana (NM)	78,334	**7**
Riverina (NM)	133,264	**12**
South East NSW (NM)	174,124	**15**
South Western Sydney (M)	618,255	**54**
Southern Sydney (M)	377,974	**33**
Western Sydney (M)	875,630	**76**

[3] The simplifying assumption was used that the distribution of businesses across regions is roughly proportional to the distribution of the population.

3.2 Screening qualifications/ sample sourcing

A qualified respondent was someone responsible in full or in part for decisions about the purchase of electricity or natural gas for the business, or was knowledgeable about the available energy options for the business.

The business customer sample was drawn from the Roy Morgan Research Business Panel. We aimed to cover a broad range of industry groups. Business panelists are incentivised with points that are convertible to gift vouchers.

3.3 The questionnaire

The business questionnaire was prepared jointly by Roy Morgan Research and the AEMC project team members. It was programmed and quality tested to ensure proper survey logic. The survey was approximately 15 minutes in length. The residential and business surveys were matched as much as possible to facilitate comparisons across the studies. Many questions simply replaced "you" with "your business."

3.4 Field period

The business survey commenced fieldwork on 12th December 2012 and concluded on the 2nd January 2013. A total of 509 completed surveys were received. There were 508 electricity users and 97 mains natural gas users.

4. MAIN FINDINGS

4.1 A Note on Formatting of Results

Some survey questions allowed for single answers only; others allowed for multiple answers. In the former case, answers may not total to 100% due to rounding. In the latter case, answers will usually well exceed 100%.

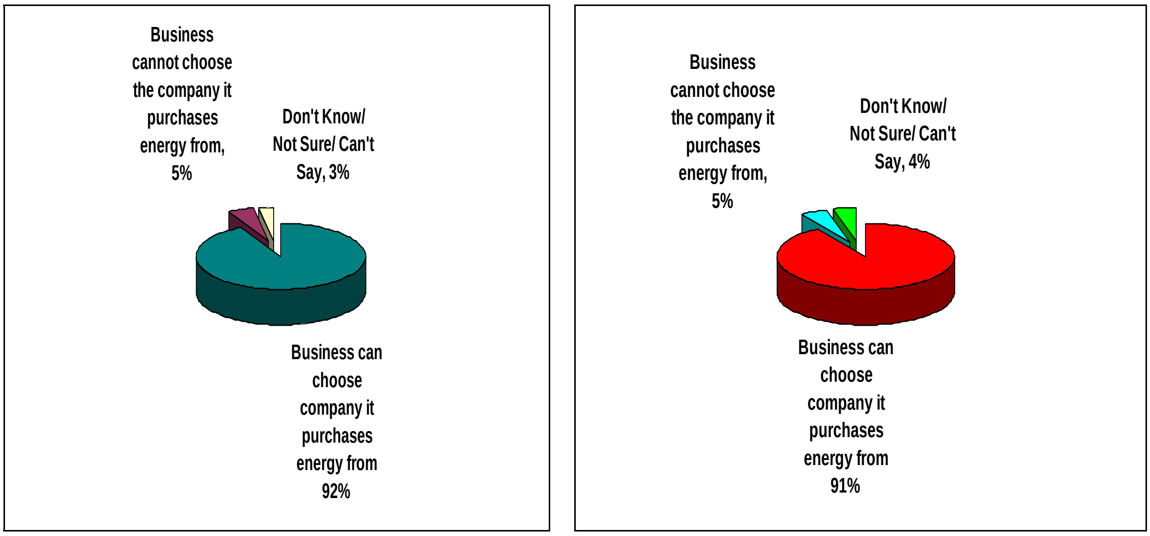
Due to space considerations and clarity, some response options are not shown in the Figures if they received a small response (often set at under 5%). Complete Figures showing all the responses are included in the appendix.

Answers to some survey questions are not shown as tables or figures. They are incorporated into the text of the report. Additional analyses of the responses on some questions were run to determine the effect of geographical location (metro vs. non-metro) and business electricity bill (low: less than $2500/quarter; high: $2500/quarter or more). Where there were significant statistical effects of these variables at the 95% confidence level or beyond, they are discussed in the text.

4.2 Energy Choice and Service Providers

Evidence of energy retail competition was strong among businesses in New South Wales. More than 90% of the businesses indicated they were aware they could select their electricity and gas company (Figure 1). For electricity, neither the metro nor non-metro score differed significantly from the total. For gas, however, the rate for gas was 96% and for non-metro 75%.

Figure 1. Energy[4] Supplier: Ability to Choose
(Left panel: electricity, right panel: gas)



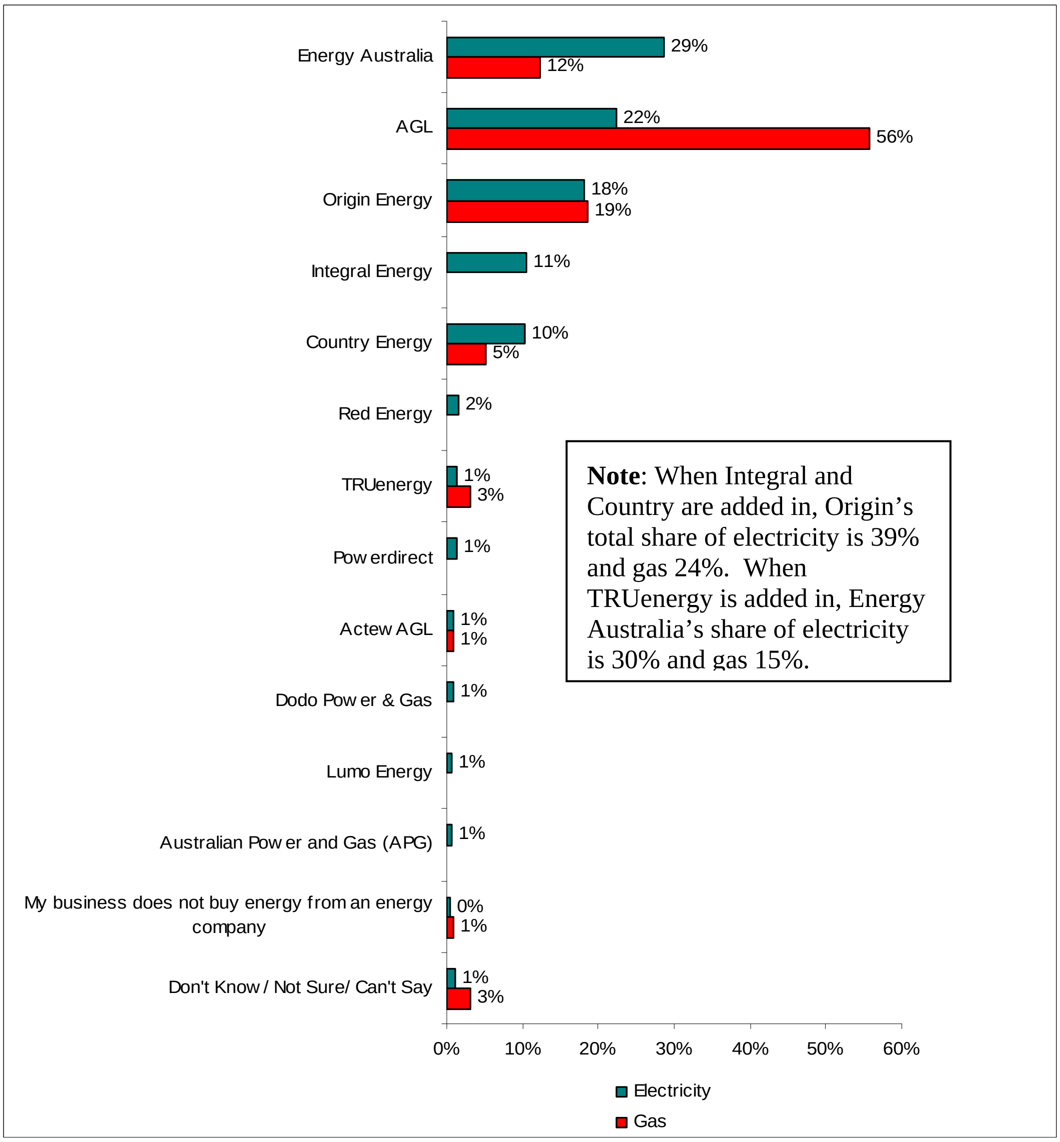
QE4/QG4. As far as you are aware, which of the following applies to your business?

Base: Total electricity users (n=508); total gas users (n=97)

[4] Throughout this report to economise on space and improve readability we use the word "energy" in place of specific references to electricity and/or gas. The survey (see Section 9) shows the question wording actually seen by respondents.

Businesses were asked to select the name of the energy retailer they currently use. Although some of the listed companies have merged (see note in Figure 2), they were presented as independent from each other. Figure 2 illustrates that AGL had a majority position for the supply of gas to businesses (56%) whereas electricity service was divided more evenly among three companies: Energy Australia (29%), AGL (22%), and Origin (18%).

Figure 2. Energy Company Used



QE5/QG5.Which company does your business buy energy from in New South Wales?

Base: Total electricity users (n=508); total gas users (n=97)

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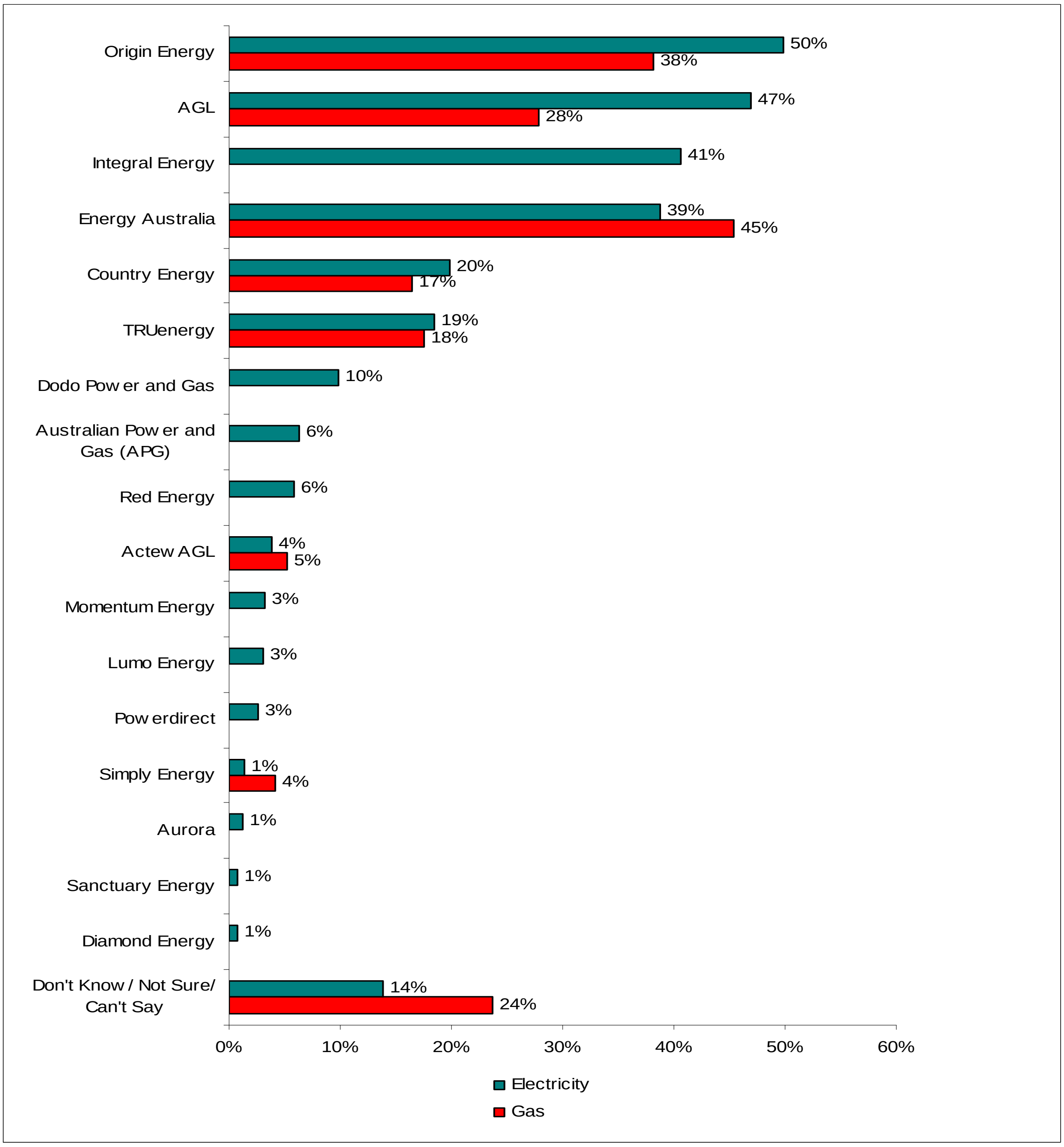
There were geographical differences seen in the Figure 2 data:

- Energy Australia was the electricity company for 36% in metro areas, 15% in non-metro;
- Country Energy, as expected, was a stronger presence in non-metro (27%) vs. 2% metro.
- AGL was used for gas by 63% metro, 33% non-metro;
- Integral was used by 13% in metro, 7% non-metro.

Although a few retailers dominated the list of energy companies currently used, a wider array of companies were mentioned as possible alternatives to the one used by the businesses (Figure 3). Knowledge of these alternatives provided further evidence of an open retail marketplace for energy purchases by businesses in NSW.

Figure 3. Companies You Can Buy Energy From



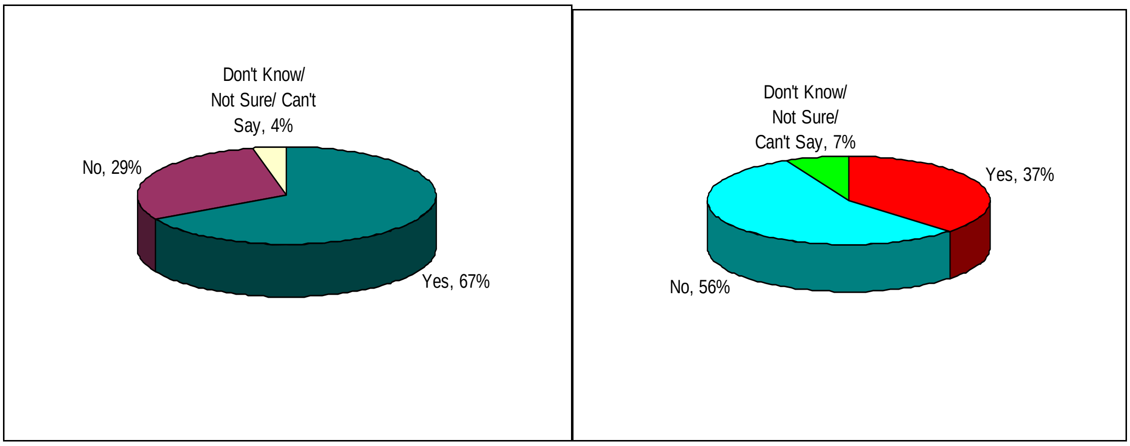
QE5a/QG5a. Which other companies do you think your business could buy energy from in New South Wales?

Base: Total electricity users (n=508); total gas users (n=97)

4.2 The Energy Purchase Process

Retail marketplace competitiveness can also be assessed by looking at the occurrence of sales approaches by energy retailers to the businesses and inquiries by business customers to the energy retailers. Two in three companies had been approached by an electricity company offering to sell electricity (Figure 4). The rate was substantially lower for gas, 37%, which may relate to the smaller number of gas companies in NSW. For gas, the approach level rose to 42% for metro respondents and was 21% for non-metro respondents. It appears that competitiveness as reflected by this measure could be improved for gas.

Figure 4. Sales Approach to Business by Energy Companies (Left panel: electricity, Right panel: gas)

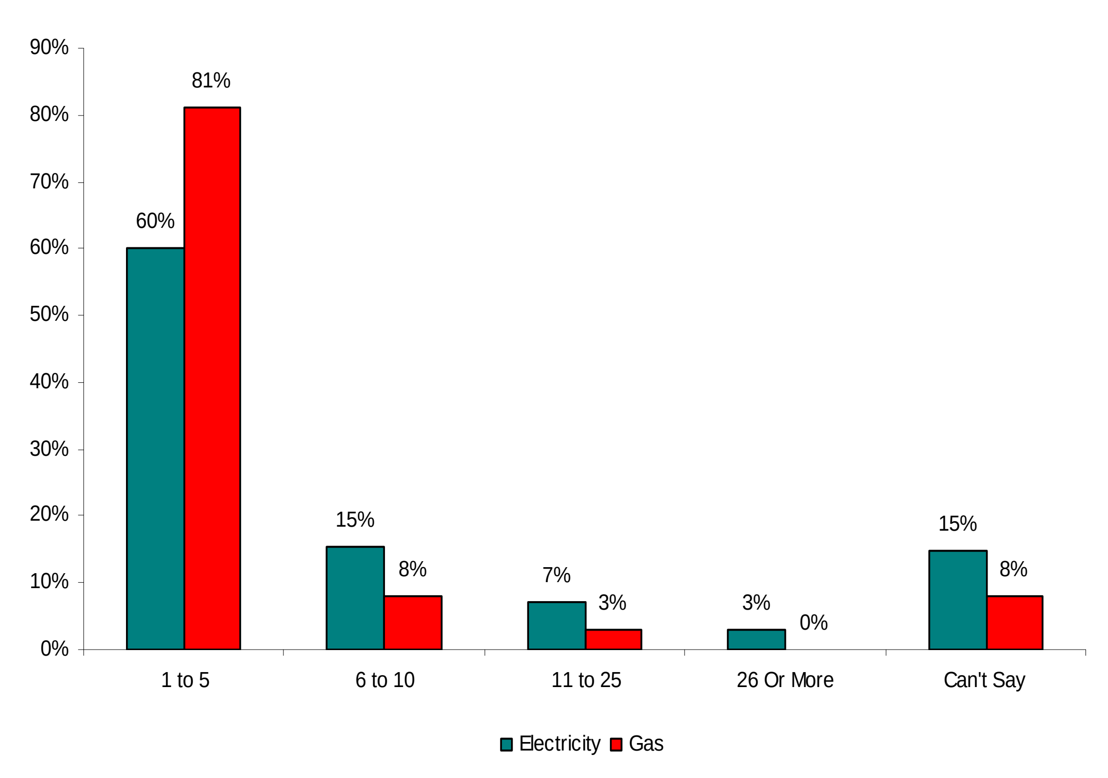


QE6/QG6.Have any energy companies approached your business by any means and offered to sell energy?

Base: Total electricity users (n=508); total gas users (n=97)

For businesses that were approached by energy retailers, one to five sales approaches was most common in the past 12 months (Figure 5). More gas customers were approached this often than electricity customers (81% vs. 60%). For gas, the rate was 77% metro, 100% in non-metro.

Figure 5. Number of Sales Approaches, Past 12 Months

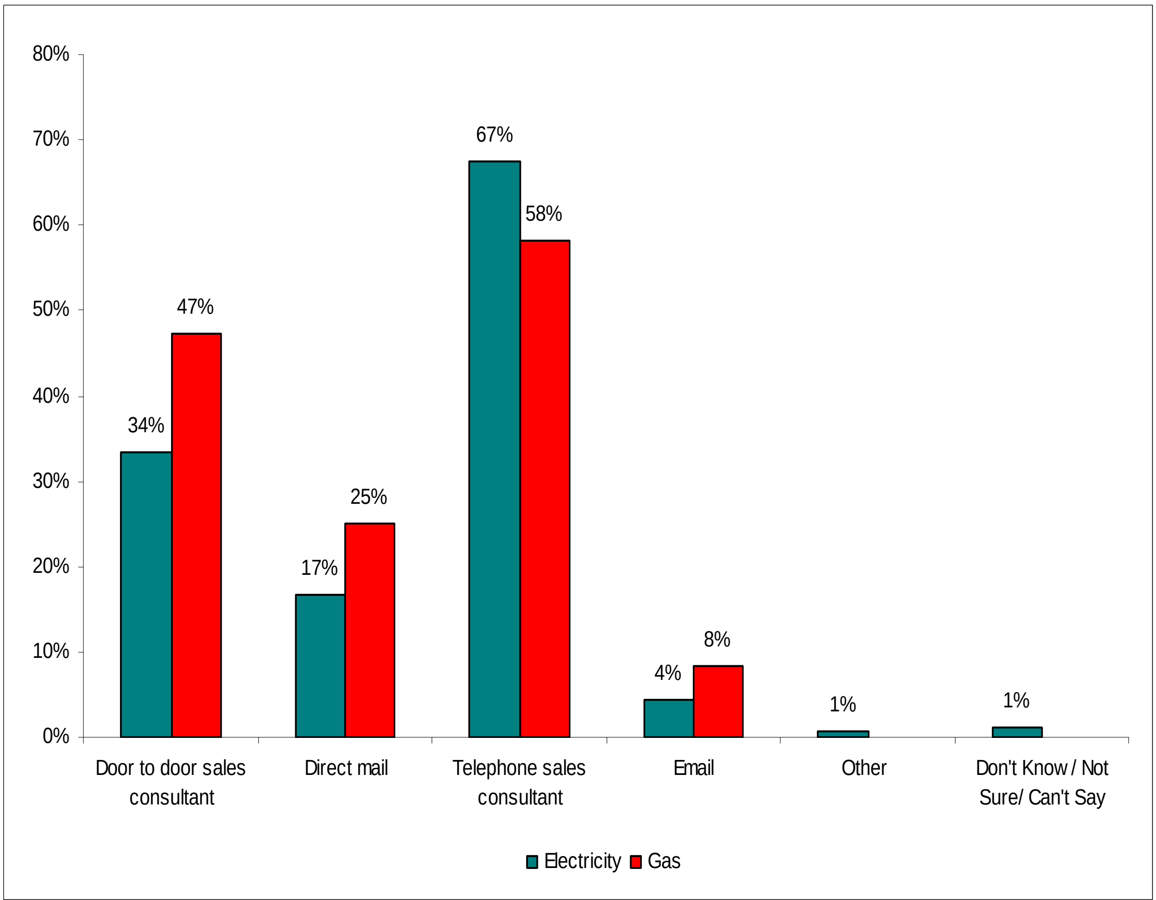


QE6a/QG6a. How many times have you or others in your business been approached in the past 12 months by electricity companies offering to sell electricity?

Base: Total approached by electricity company (n=340); total approached by gas company (n=36)

Figure 6 shows that telephone contacts were the most common sales mode but door-to-door sales calls were also frequent. Door-to-door approach rates for electricity were 38% for metro businesses and 25% for non-metro businesses. This may reflect the greater ease with which metro businesses can be covered by the door-to-door approach compared to businesses that may be more widely dispersed in the non-metro areas.

Figure 6. Method of Sales Approach Reported

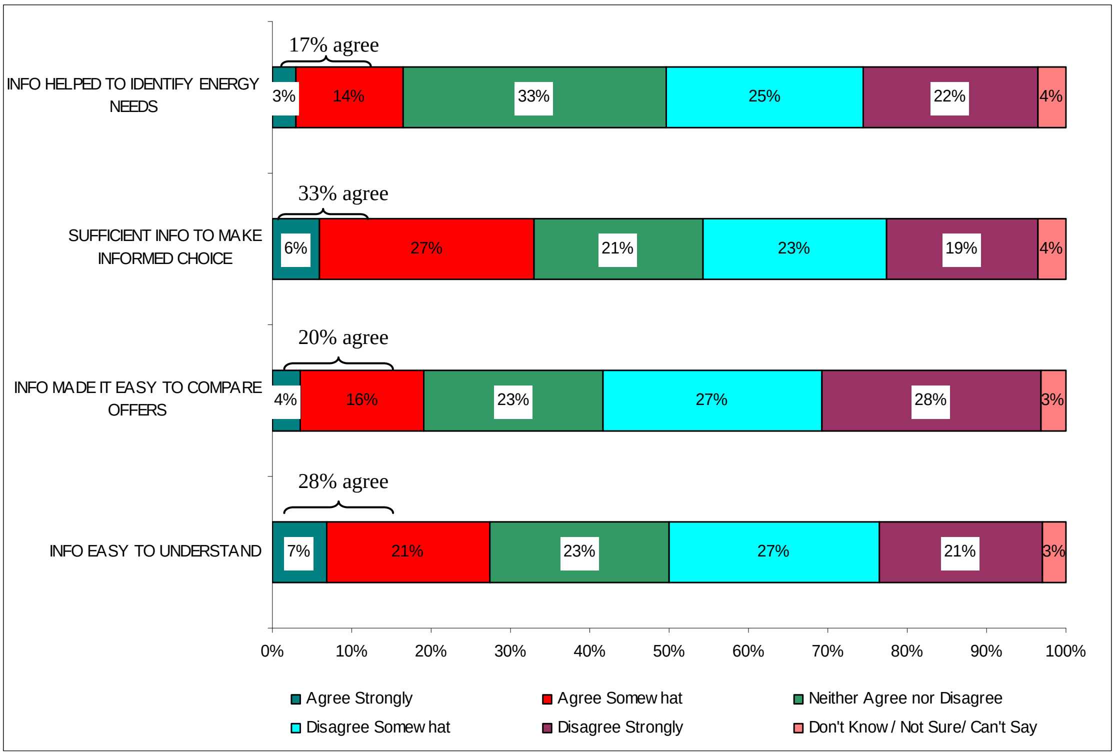


QE7/QG7. Thinking about the last energy company who contacted you, how did they approach you?

Base: Total approached by electricity company (n=340); total approached by gas company (n=36)

The information received during the sales encounters were not viewed very favourably. Positive ratings for electricity information did not exceed 35% for any of the four attributes such as information sufficiency and ease of understanding (Figure 7).

Figure 7. Ratings of Sales Encounters: Electricity Information

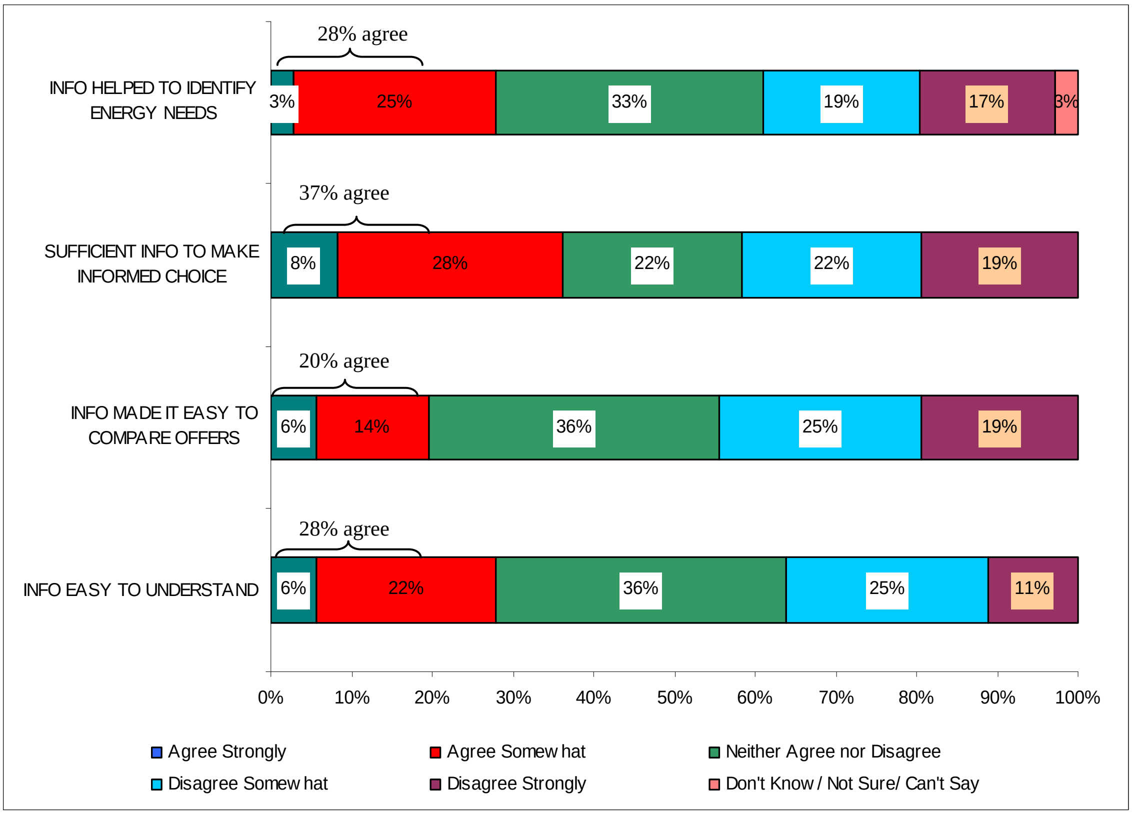


QE8 (a-d) How much do you agree or disagree with the following statements?

Base: Total approached by electricity company (n=340)

Levels of positive ratings for the information about gas were similar to those shown for electricity in Figure 7. Only "sufficient information" exceeded 30% for "agree strongly" or "agree somewhat" (Figure 8). These are potential areas for improvement for the energy retailers and sales force.

Figure 8. Ratings of Sales Encounters: Gas Information



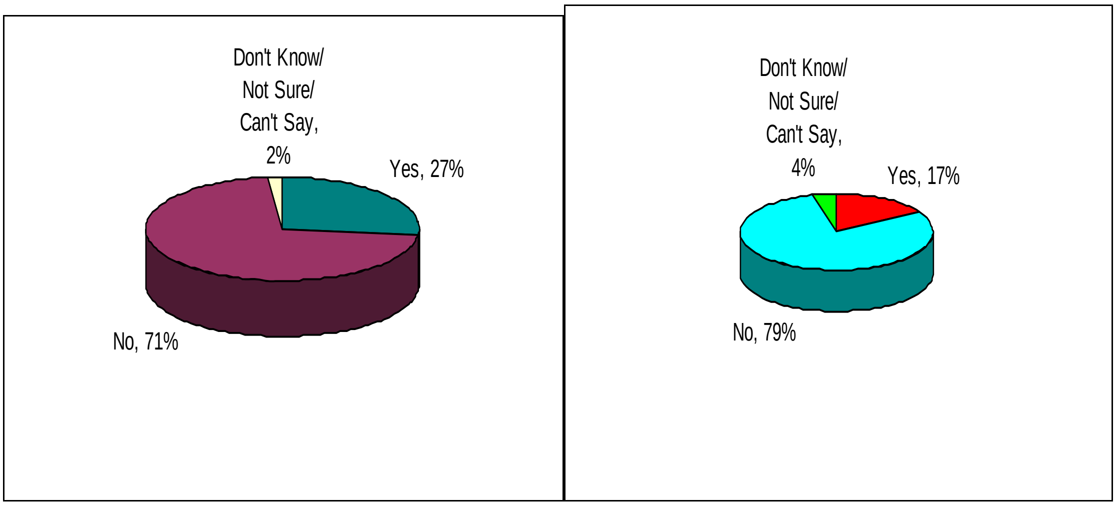
QG8 (a-d) How much do you agree or disagree with the following statements?

Base: Total approached by gas company (n=36)

In addition to energy retailers approaching business customers, the survey examined the reverse possibility—businesses approaching retailers. More than 70% of businesses surveyed did not themselves approach electricity or gas companies about buying the energy services. Approaches were more common for electricity than gas however (27% vs. 17%), as shown in Figure 9. Extra analyses showed that the percentage of customers for electricity making approaches varied by location (24% in metro, 33% non-metro) and size of the electricity bill (24% low bill, 37% high bill). This latter finding is logical in that a higher bill would be expected to provide a greater motivation to seek out information from companies and to examine competitive offers.

Though the rate of business approaches is not great, a question assessing the awareness of the ability to make such approaches would be expected to yield a stronger result. As it stands, Figure 9 on its own does not provide strong support for the presence of retail competition in NSW. Taken together with the data in Figure 8 (retailer approaches to customers), the outlook is better.

Figure 9. Business Approaches to Energy Companies (Left panel: electricity, Right panel: gas)

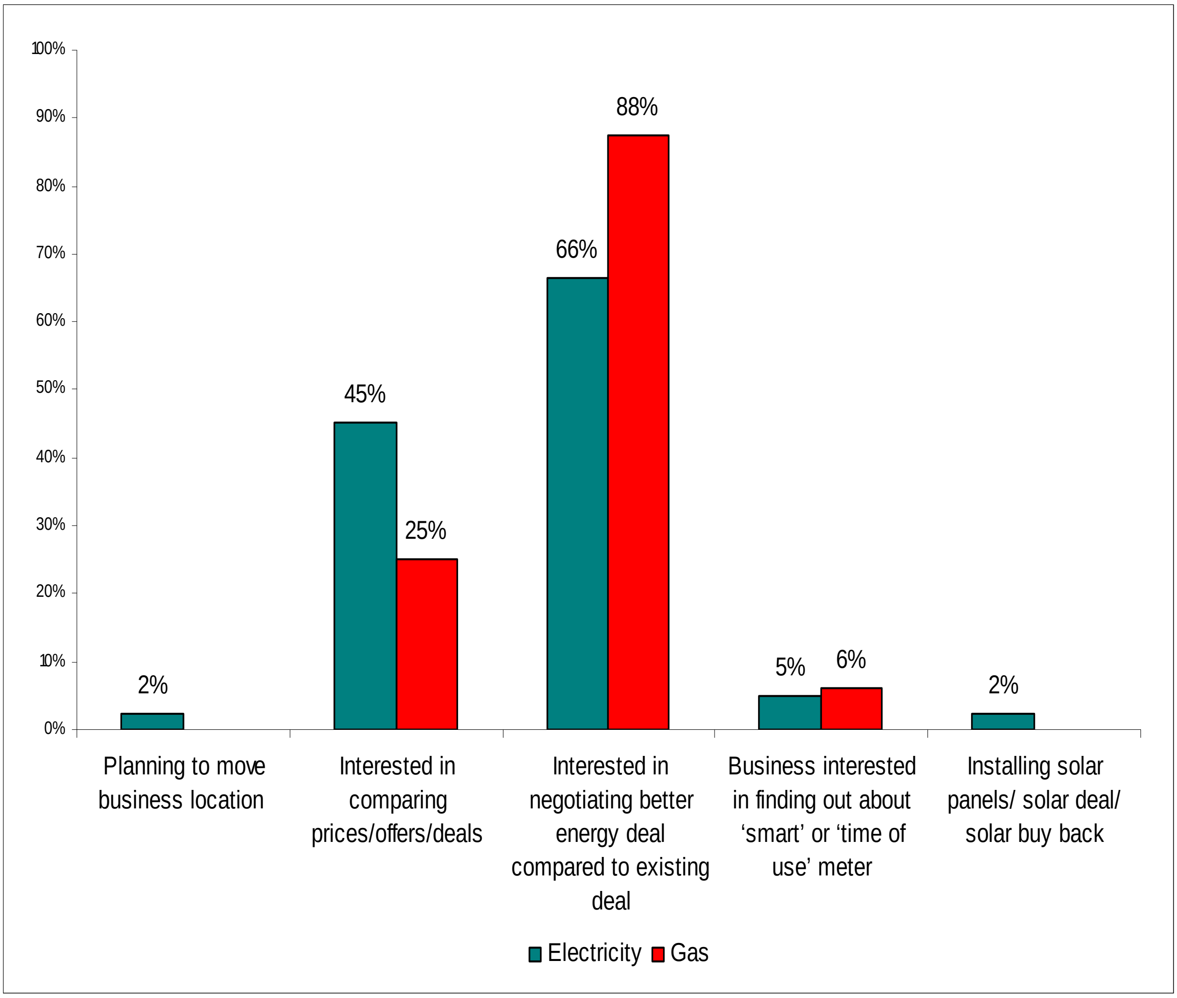


QE9/QG9. Has your business approached an energy company, including the existing energy company, to ask about buying energy from them?

Base: Total electricity users (n=508); total gas users (n=97)

Figure 10 shows the reasons businesses gave for approaching an electricity or gas company. The most common reason related to “negotiating a better deal” (more common for gas) followed by the similar “comparing prices/deals” (more common for electricity).

Figure 10. Reasons for Approaching Energy Company



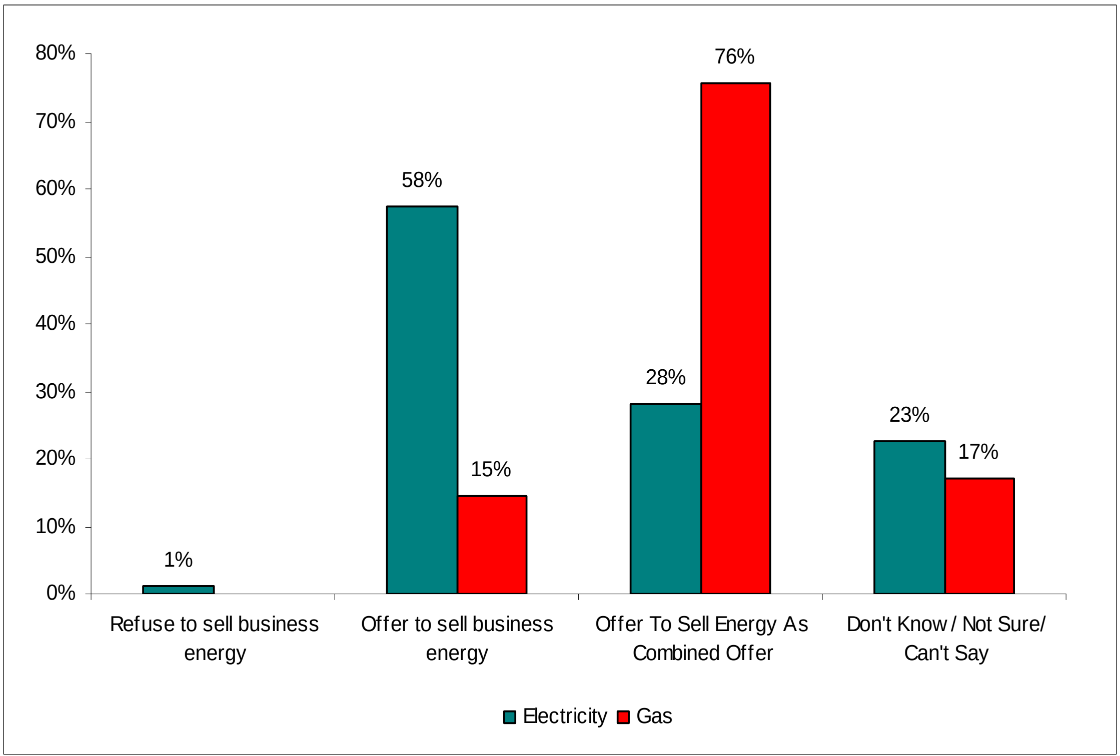
QE10/QG10. Why did your business approach the energy company to ask about buying energy from them?

Base: Total approached electricity companies (n=137); total approached gas companies (n=16)

The telephone was the preferred mode used by businesses to contact energy suppliers, followed by the internet. Eighty five percent of electricity users and 88% of gas users used this method. The second most common method of contacting companies was internet (17% for electricity users and 19% for gas users).

The refusal to sell an energy service to a business was nearly non-existent (Figure 11). Gas retailers were particularly active in offering a bundled service of electricity and gas (76%) when they approached a business or were approached by a business.

Figure 11. Outcome of Sales Encounter (Initiated by Retailer or Business Customer)



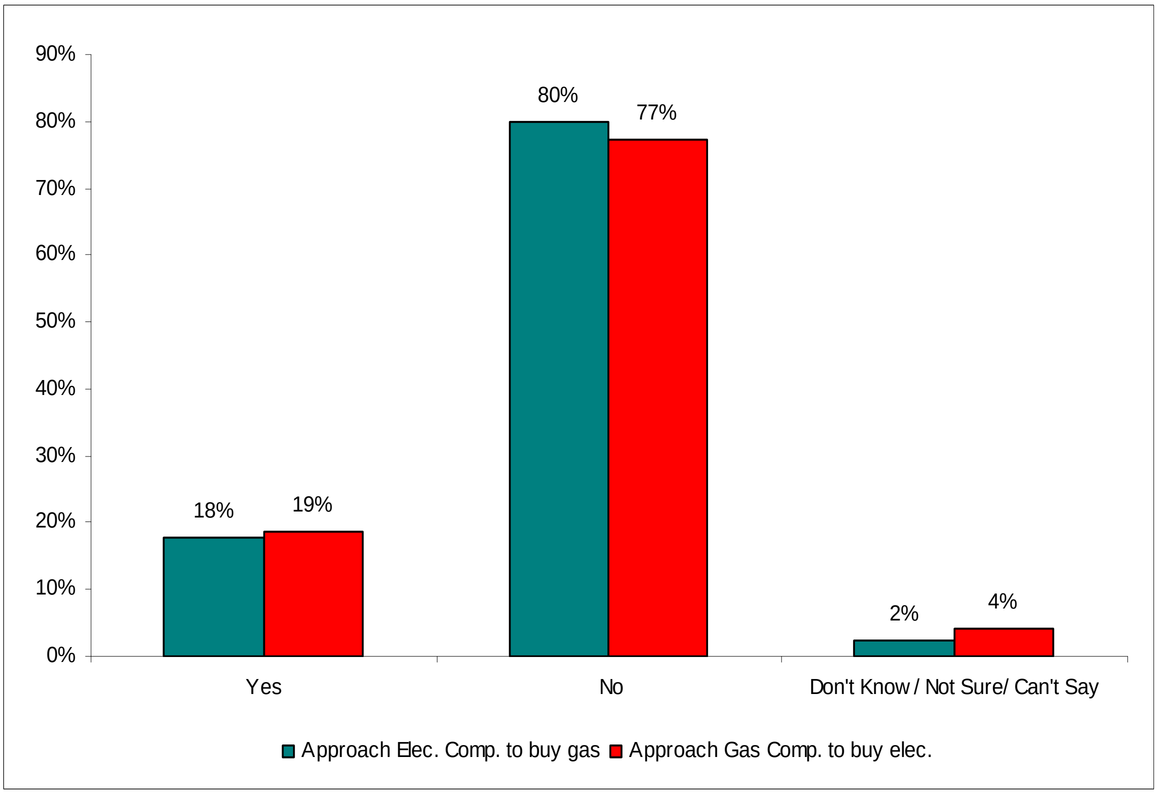
QE12/QG12. Did any of the energy companies that your business approached, or that approached your business...

Base: Total approached by electricity company or approached electricity company (n=372);

Total approached by gas company or approached gas company (n=41)

Because some energy companies offer both electricity and gas services, businesses that were gas customers were asked if they had approached an electricity retailer to buy gas and whether they had approached a gas retailer to buy electricity. Rates for each of these activities were less than 20% (Figure 12).

Figure 12. Approaches to Energy Companies by Business Customers Using Gas



QE13/QG13. Has your business approached any energy company, including the existing energy company, to ask about buying energy from them?

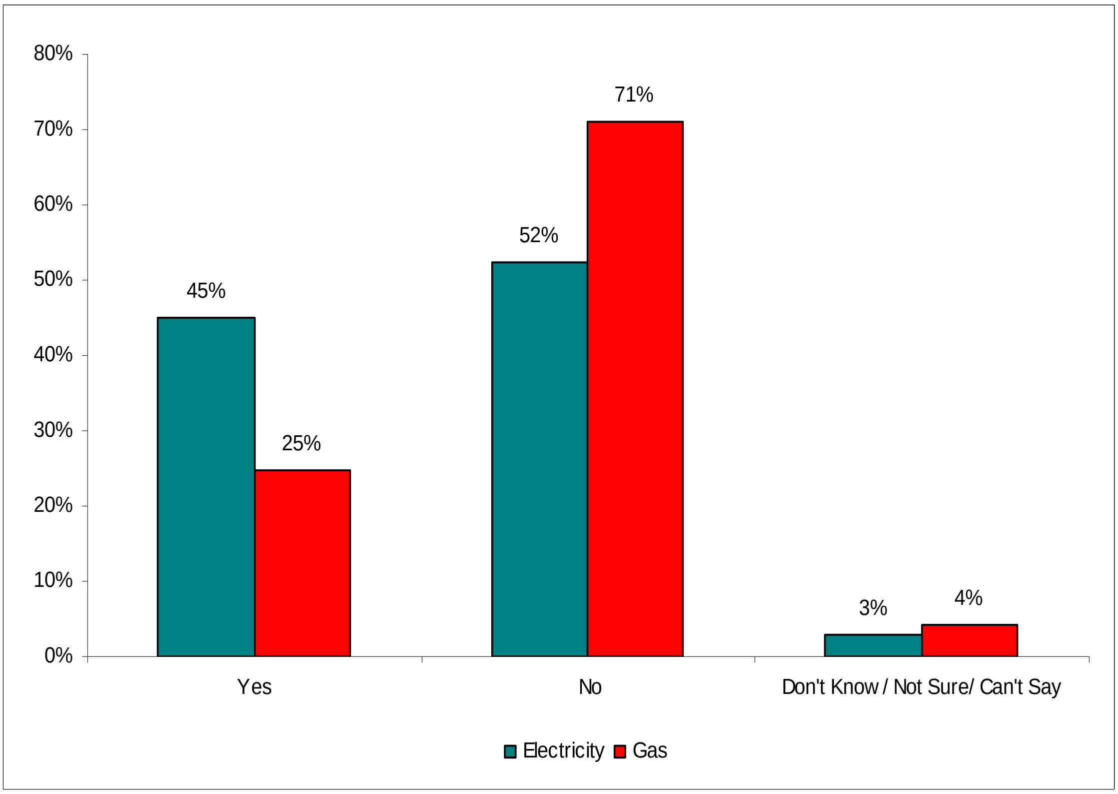
Base: Total use piped natural gas in business or able to connect to piped natural gas (n=164); total use piped natural gas in business (n=97)

4.3 Switching Behaviour

4.3.1 Switching of Suppliers

If businesses are aware of multiple energy companies and they experience sales inquiries, it follows that a certain number of businesses will switch suppliers. The switching of electricity companies since 2002 was markedly more common among businesses than the switching of gas companies (45% vs. 25%), as shown in Figure 13. Switching electricity companies was even higher in non-metro areas (52%) vs. metro (41%). This overall "switching advantage" for electricity may reflect the greater number of electricity companies that businesses are aware of.

Figure 13. Switching Energy Companies

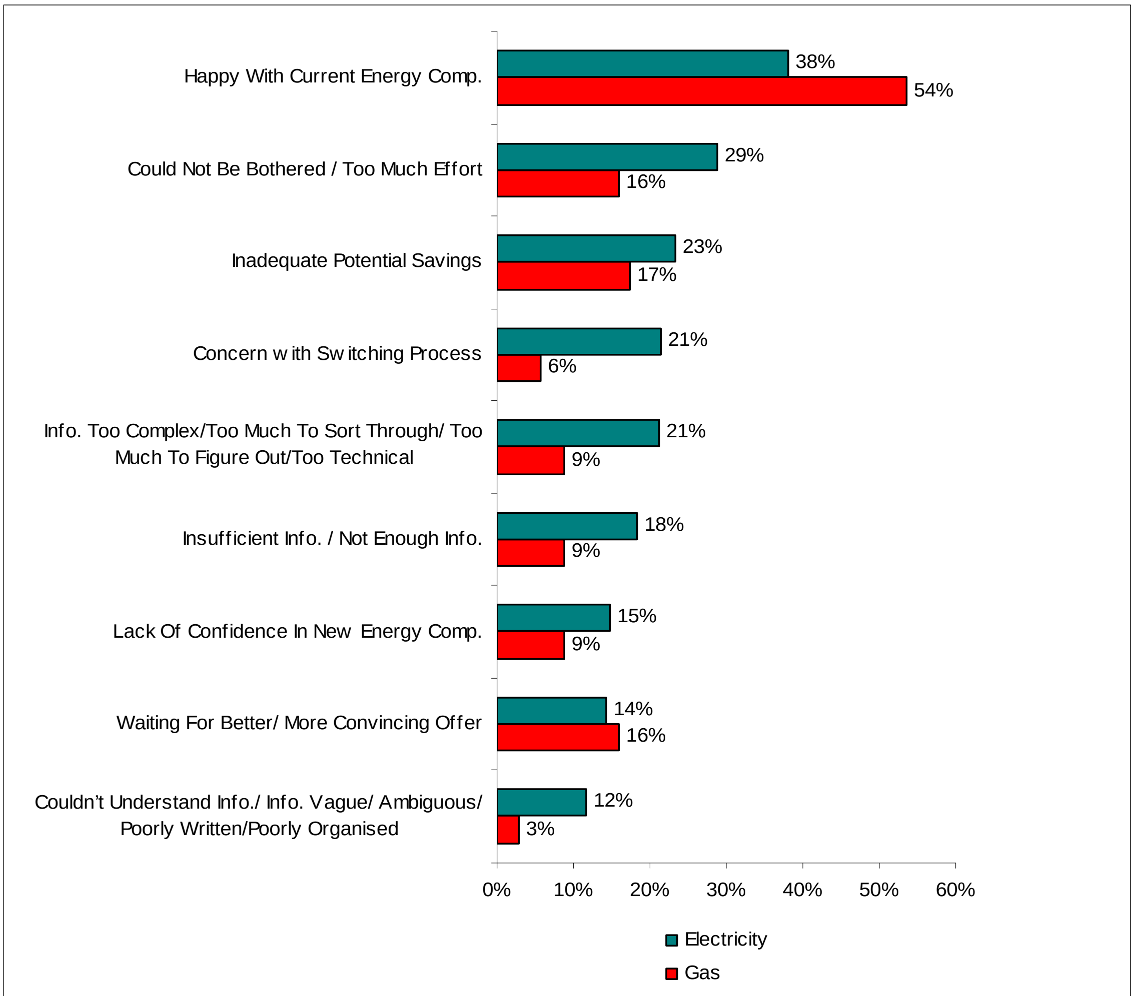


QE14/QG14. Has your business switched energy companies in NSW since January 2002?

Base: Total electricity users (n=508); total gas users (n=97)

Figure 14 shows that most businesses that did not switch providers gave the reasons "satisfied with the company" and "could not be bothered." Many categories of reasons for not switching were more common for electricity (for example, "inadequate potential savings," "information too complex"). Energy companies were not described as placing barriers in the way of switching but mentions of information complexity (and the unimpressive ratings of the information seen in Figures 7-8) suggest this could be an informal barrier because a confused and frustrated customer may be deterred from switching.

Figure 14. Reasons Why Companies Did Not Switch Energy Provider



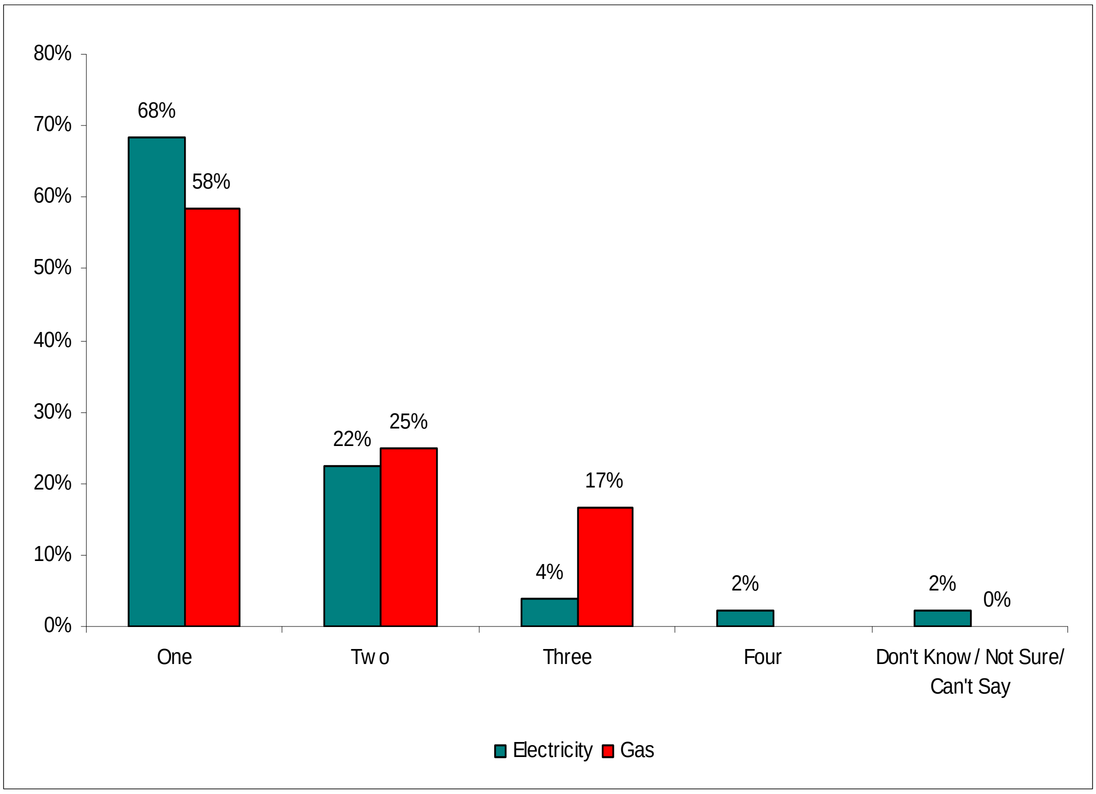
QE25 /QG25. Why hasn't your business changed energy companies?

Base: Total not switched NSW electricity companies since Jan 2002 (n=266);

total not switched NSW gas companies since Jan 2002 (n=69)

Most businesses that switched had done so only once in the past 10 years. About a quarter have switched twice (Figure 15).

Figure 15. Number of Times Switched Energy Companies Since 2002

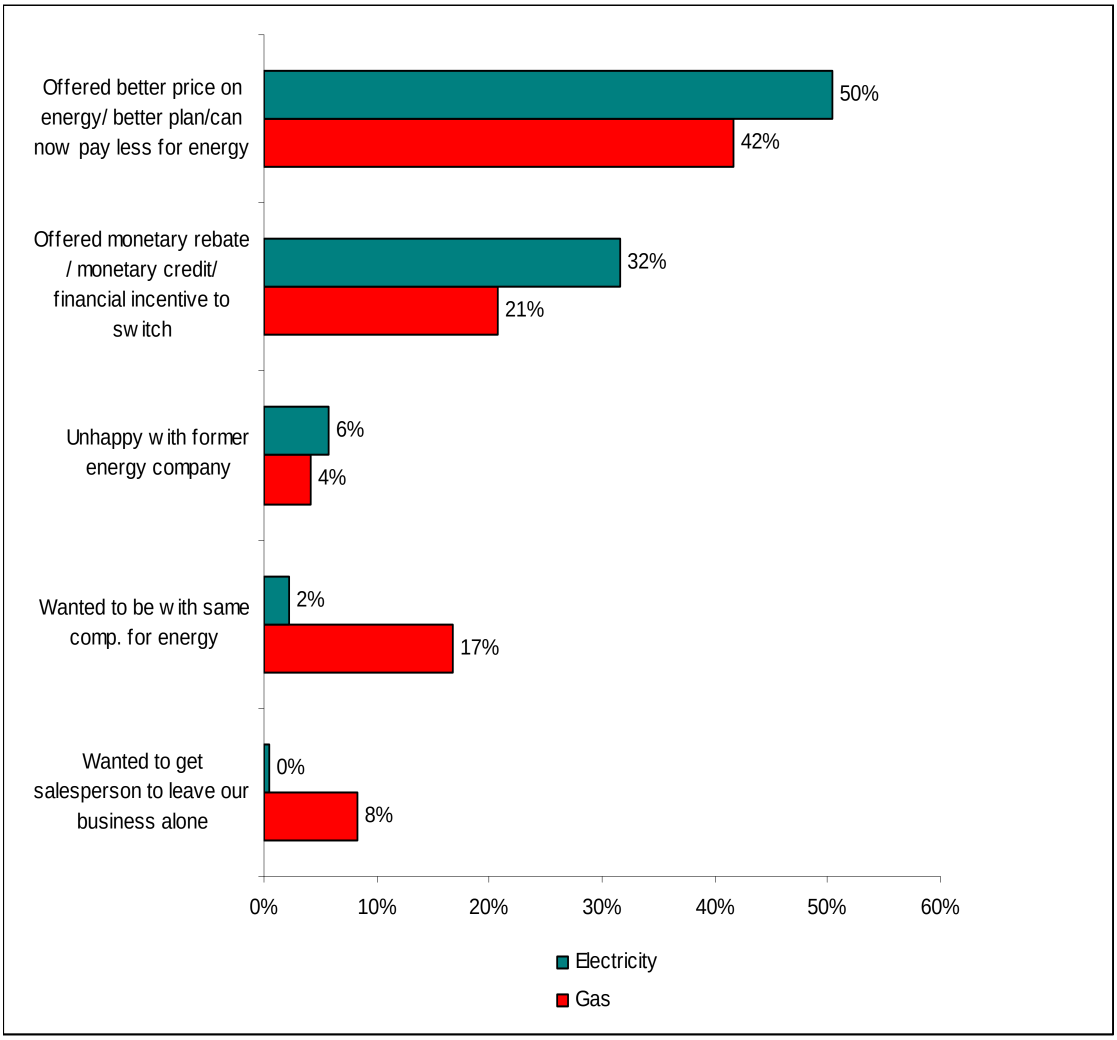


QE14a/QG14a. How many times has your business switched energy companies in New South Wales since January 2002?

Base: Total switched electricity companies (n=228); total switched gas companies (n=24)

Not surprisingly, monetary reasons were the most common driver of switching. Comments about price or rate comprised the top two categories (Figure 16). Bundling was more commonly cited for gas customers than electricity customers.

Figure 16. Reasons for Switching Energy Companies



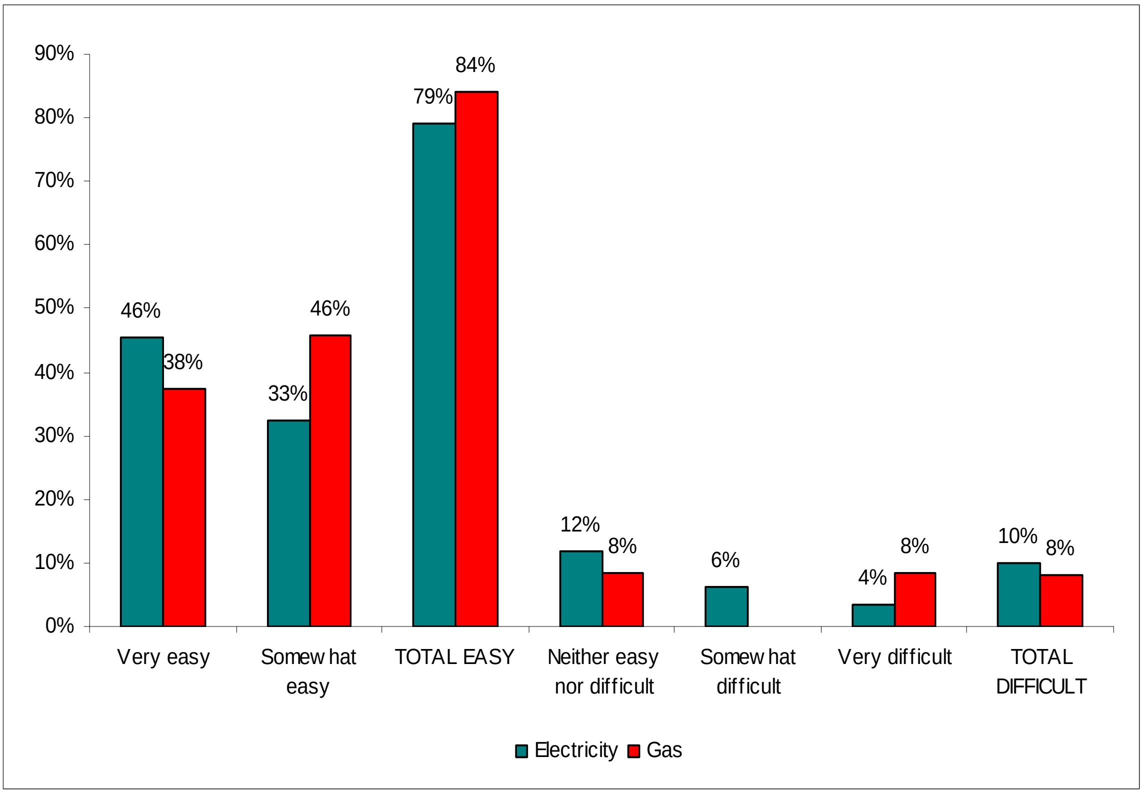
QE20/QG20. The last time your business switched energy companies,

what was the one most important reason for decision?

Base: Total switched electricity companies (n=228); total switched gas companies (n=24)

Figure 17 shows that businesses rated the ease of switching quite high. "Very" + "somewhat" easy (termed Total Easy) was 79% for electricity and 84% for gas. The metro businesses were even more positive to the switching experience. The Total Easy rating was 85% for metro businesses compared to 68% non-metro. Businesses with lower electricity bills also rated the switch "very easy" at a higher rate (49%) than businesses with a higher electricity bill (33%).

Figure 17. Ease of Switching

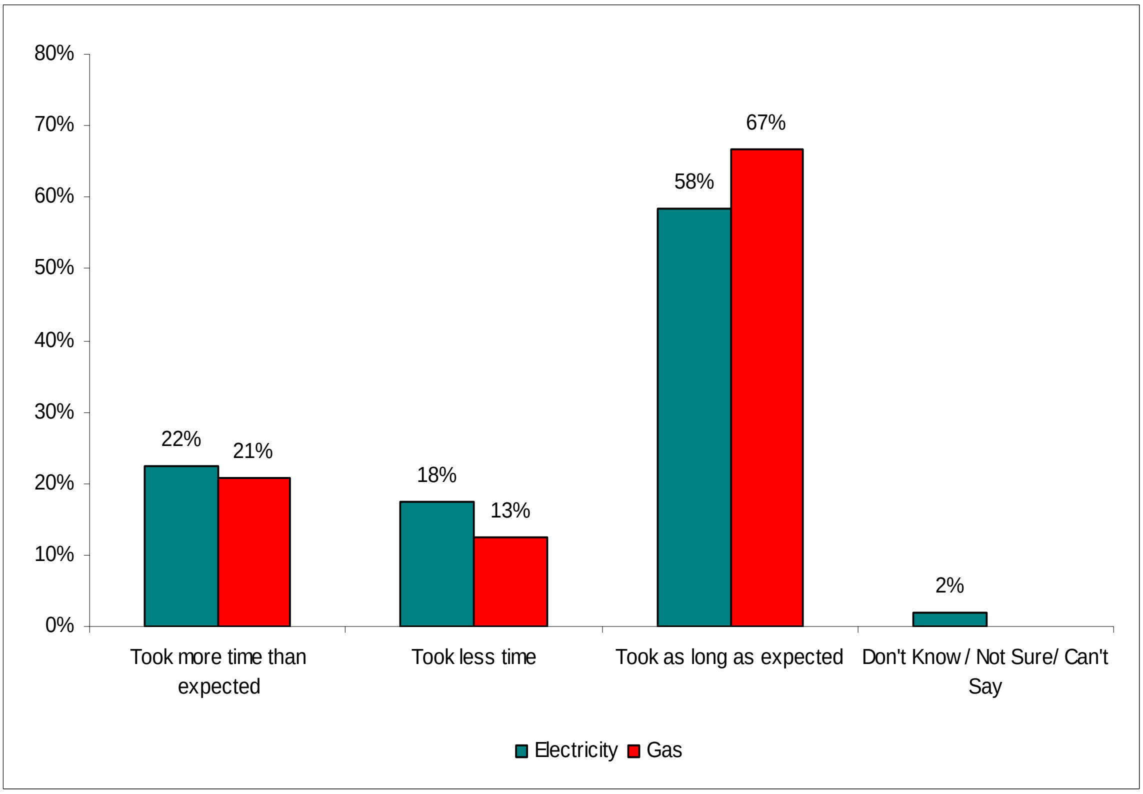


QE15/QG15. The last time your business switched its energy company, how easy was the switching process?

Base: Total switched electricity companies (n=228); total switched gas companies (n=24)

For businesses that switched, the time it took was judged "about as long as expected" by two in three who engaged a new gas company and by about 60% for electricity (Figure 18). About one in five thought the process took longer than it should.

Figure 18. Time Taken to Switch vs. Expectation



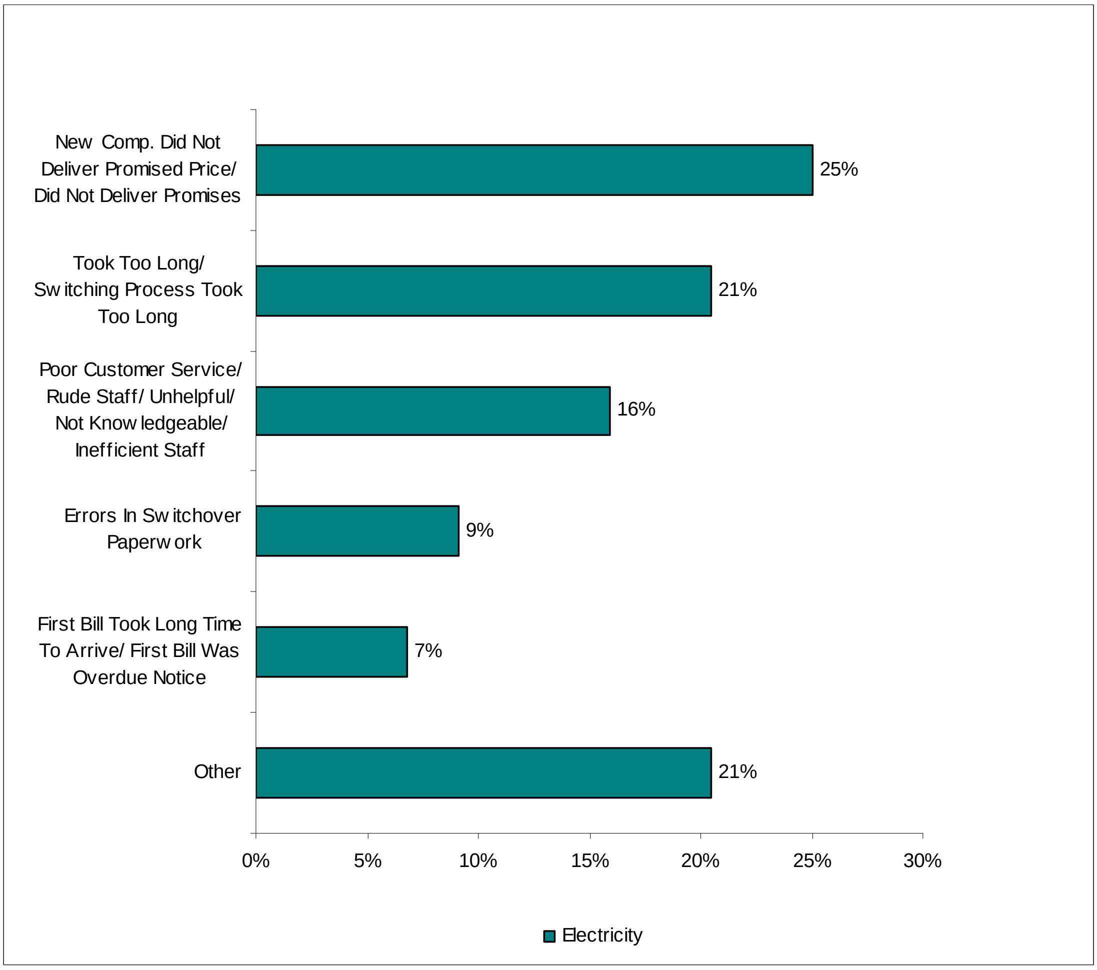
QE16/QG16. Would you say the switching process for your business...?

Base: Total switched electricity companies (n=228); total switched gas companies (n=24)

About three in four businesses thought the switching process went about as smoothly as expected. For the 15% or so who did not think the process was smooth, the reasons are shown in Figure 19 for electricity only. There were only 3 people captured by this question for gas, not enough to report.

Primary reasons for the process not going smoothly centered on not companies not delivering what was promised (for example, price) or the length of the process.

Figure 19. Why Electricity Switching Process Was Not Smooth



QE19/QG19. Why did the switching process not go smoothly?

Base: Total did not have a smooth switching process for electricity (n=44); total did not have a smooth switching process for gas (n=3)

The level of satisfaction with the new energy company is shown in Table 2. A majority were very or somewhat satisfied. Dissatisfaction rates were 11% for electricity and 16% for gas.

Table 2: Degree of Satisfaction with New Energy Company

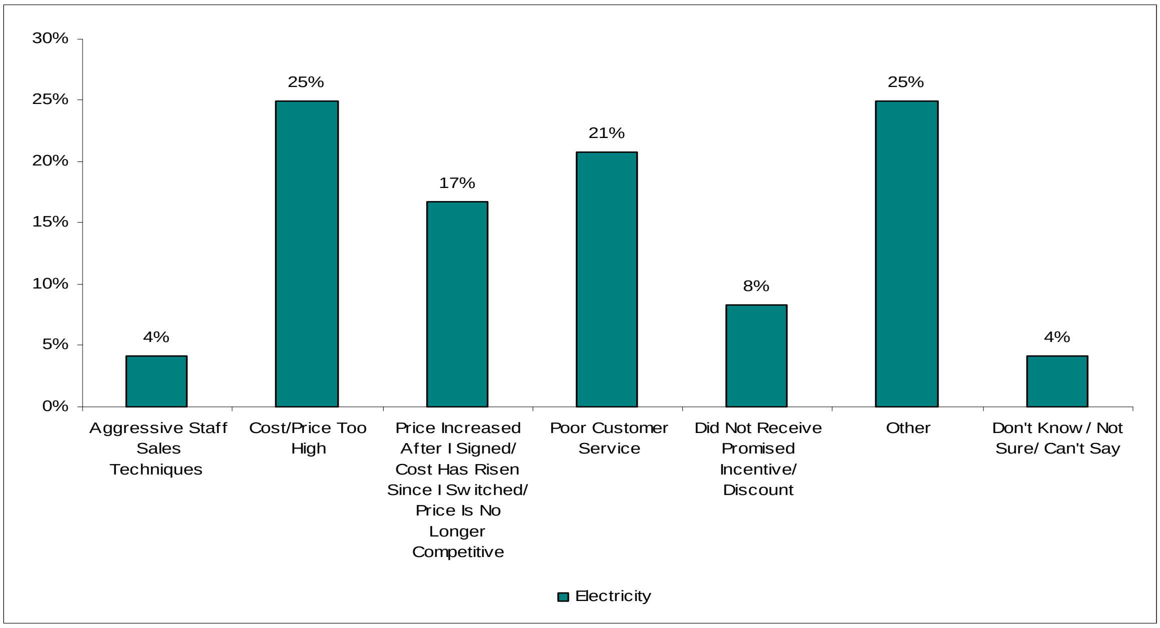
	Electricity	Gas
Very satisfied	21%	17%
Somewhat satisfied	35%	38%
TOTAL Satisfied	56%	55%
Neither satisfied nor dissatisfied	31%	21%
Somewhat dissatisfied	8%	8%
Very dissatisfied	3%	8%
TOTAL Dissatisfied	11%	16%
Don't Know/ Not Sure/ Can't Say	3%	8%

QE22/QG22. Overall, how satisfied or dissatisfied are you with your business's new energy company?

Base: Total switched electricity companies (n=228); total switched gas companies (n=24)

The reasons given for the dissatisfaction with electricity switches were collected. Reasons centered on prices (25%) and customer service (21%), as seen in Figure 20. Information for dissatisfied gas switchers was based on only 3 people and is not shown.

Figure 20. Reasons for Dissatisfaction with New Energy Company

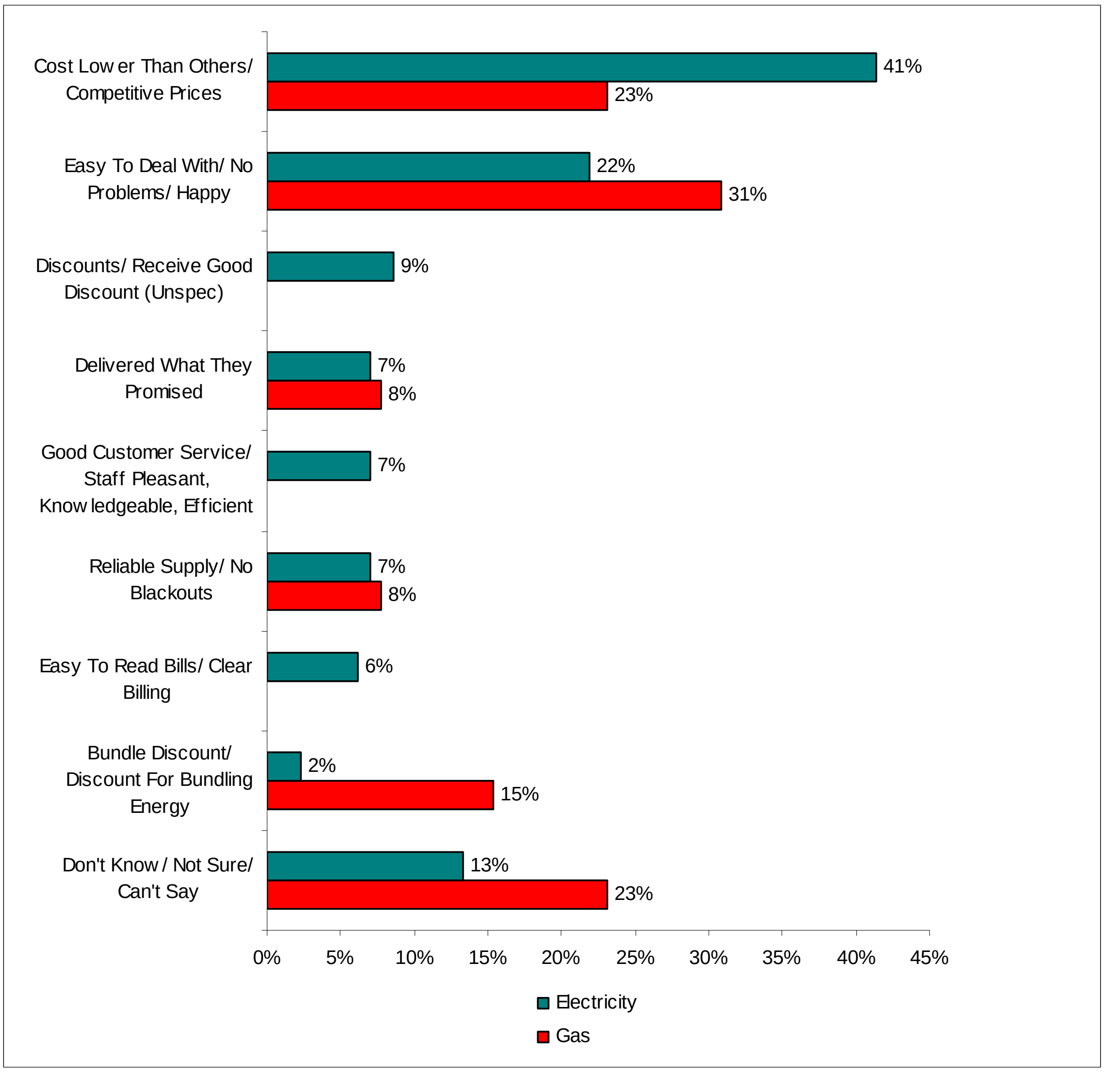


QE23/QG23. Why are you dissatisfied with your business's new electricity company?

Base: Total somewhat dissatisfied or very dissatisfied with electricity switch (n=24)

Reasons for being satisfied with the switch focused on "cost" for electricity more so than for gas (Figure 21). Customer service ("easier to deal with") was the second most common answer.

Figure 21. Reasons for Satisfaction with New Energy Company



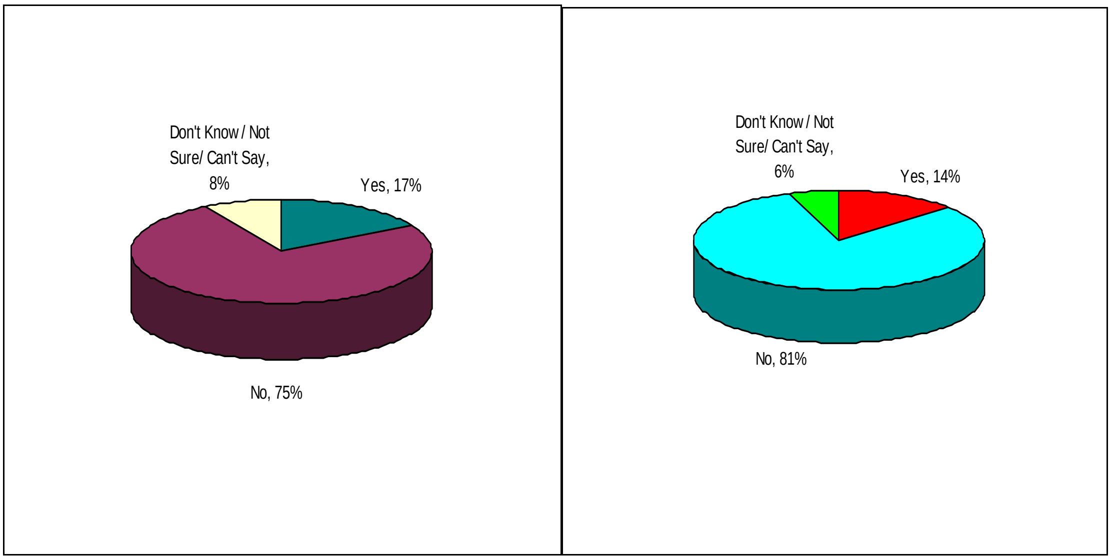
QE24/QG24. Why are you satisfied with your business's new energy company?

Base: Total very satisfied or somewhat satisfied (n=128 for electricity ; n=13 for gas)

4.3.2 Changing Energy Arrangements

Businesses that did not switch suppliers for electricity or gas were asked if they changed "the way the company sells the service." That is, within their own service supplier had they changed a service plan or some other arrangement? Figure 22 shows that this behaviour was fairly rare. Fewer than 1 in 5 businesses had made changes to their arrangements for gas or electricity.

Figure 22. Incidence of Changing Energy Arrangements (with Same Provider) (Left panel: electricity, Right panel: gas)

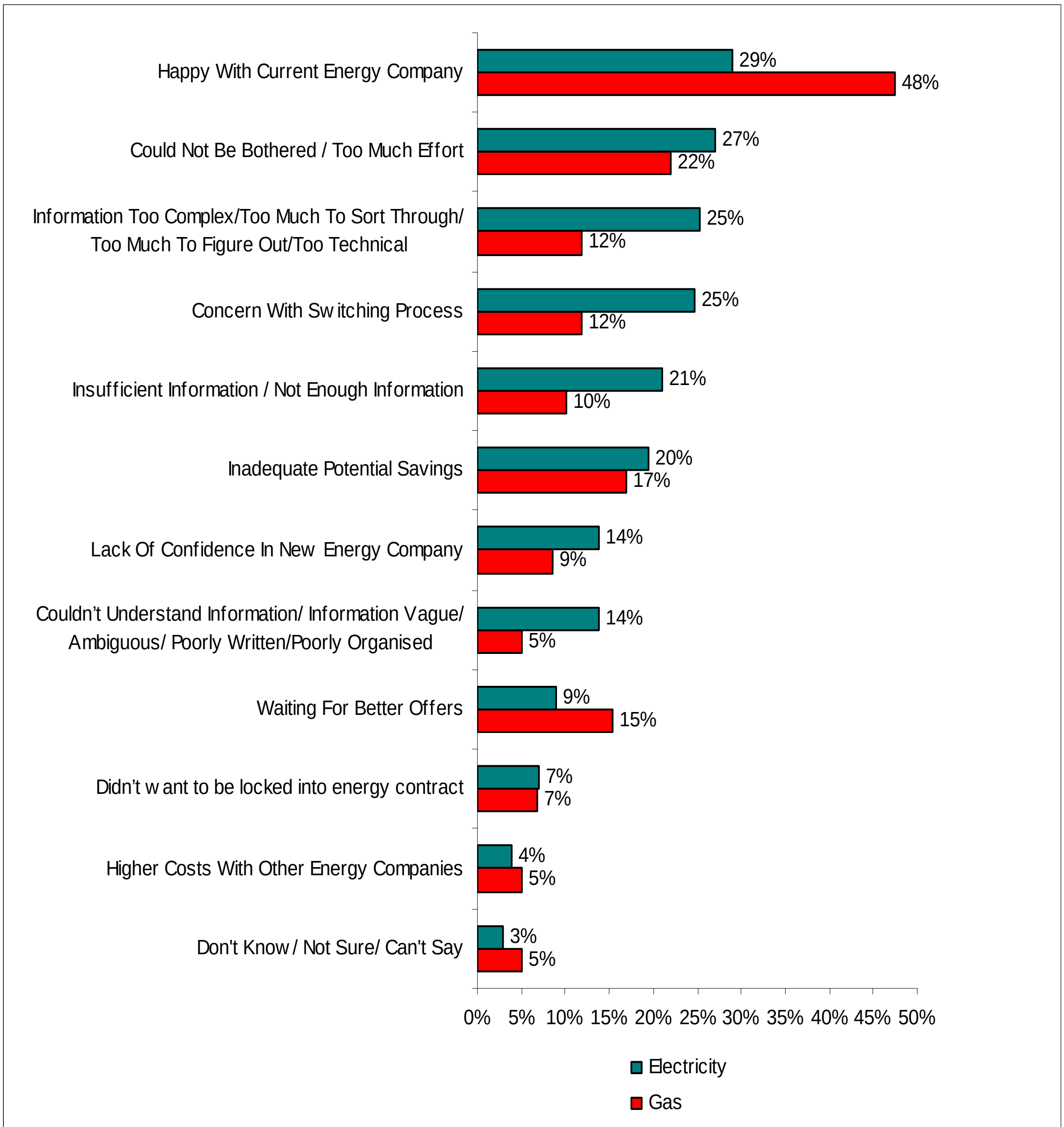


QE26/QG26. Have you changed anything about the way your current energy company sells energy the business?

Base: Total not switched NSW electricity companies since Jan 2002 or don't know (n=280); total not switched NSW gas companies since Jan 2002 or don't know (n=73)

Reasons that businesses gave for not changing the arrangements are shown in Figure 23. Similar to the reasons given for not switching energy companies, businesses cited "happy with current company" and "couldn't be bothered" as the leading reasons. Information complexity was cited by one in four for electricity. Mentions of "lack of confidence in the new energy company" were more frequent for businesses with a lower electricity bill (16%) than a higher bill (3%).

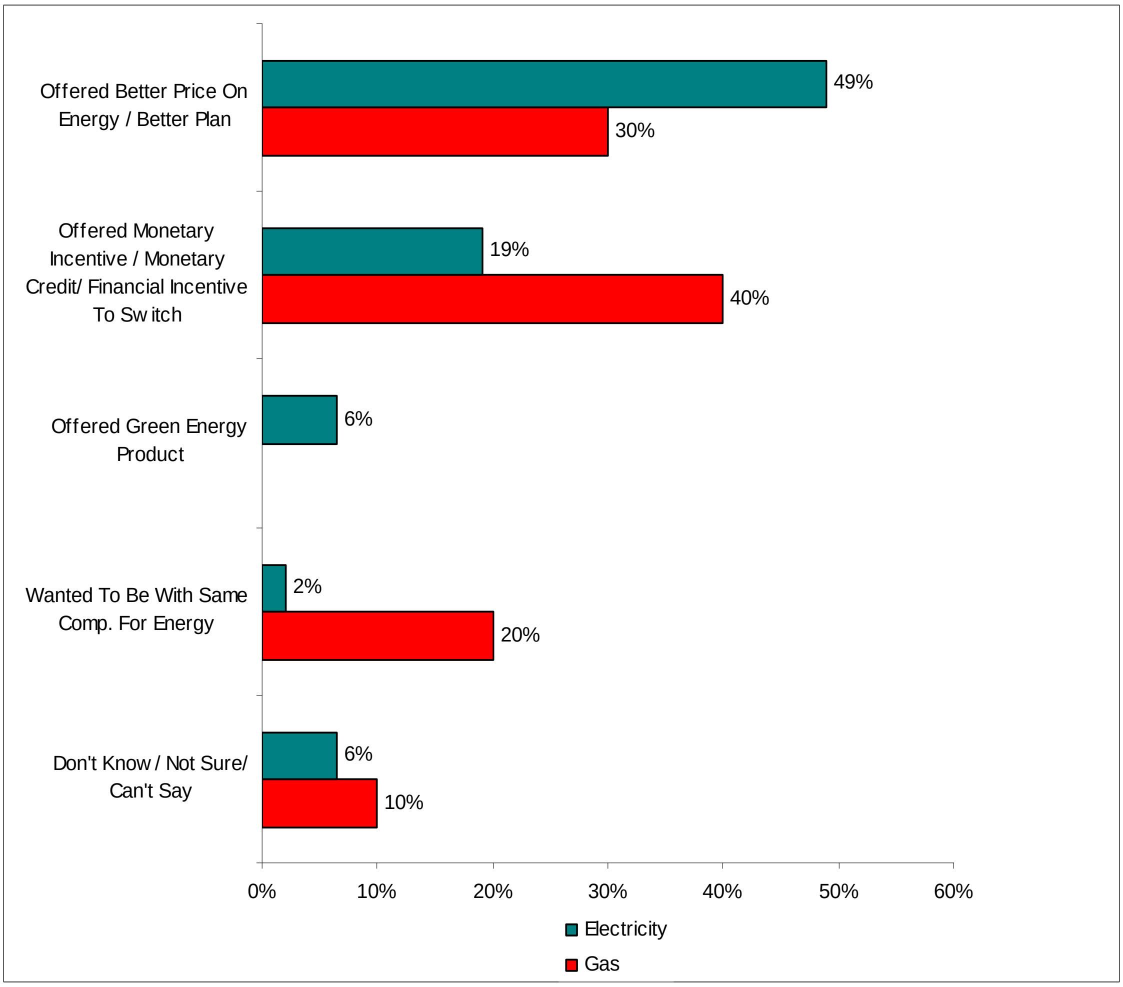
Figure 23. Reasons Why Arrangements With Energy Not Changed



QE34/QG34. Why haven't you made any changes to the way your business buys energy? Base: Total not changed any arrangements (n=210); total not changed any arrangements (n=59).

Businesses that made a change in plans/arrangements with their current supplier mentioned better prices or monetary incentives most often as the main reason (Figure 24). Bundling was mentioned by 20% of the gas customers compared to 2% of electricity customers. It may be that the financial incentives for bringing electricity into the fold is greater than bringing in gas but other explanations cannot be ruled. Whereas all businesses using gas had electricity, the reverse was not true so not many businesses with electricity could have mentioned bundling of gas services.

Figure 24. One Main Reason for Changing Energy Arrangements

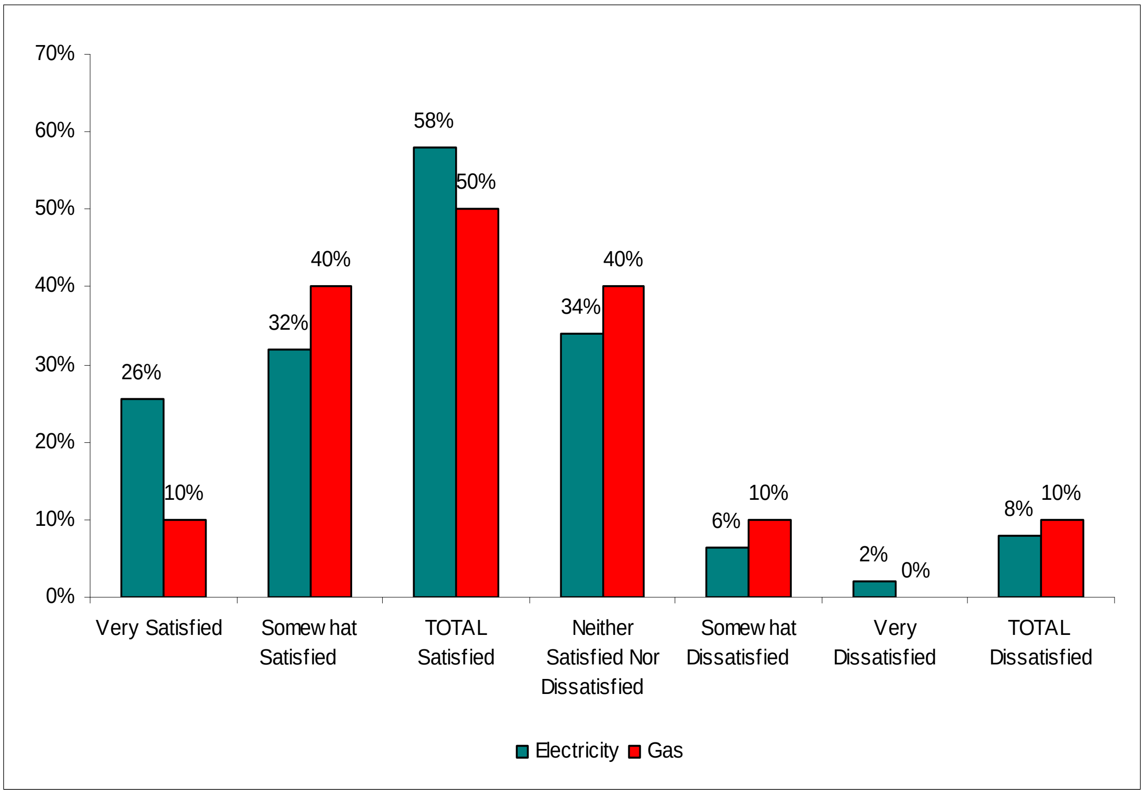


QE27/G27. Thinking about the last time you changed energy supply arrangements with your current company, what was the one main reason?

Base: changed electricity arrangement (n= 47); changed gas arrangement (n=10)

Overall (Total) satisfaction with the new arrangements was achieved for 58% of electricity customers and 50% for gas customers. Many were neutral about the change (Figure 25) so dissatisfaction rates were quite low.

Figure 25. Satisfaction with the New Energy Arrangements

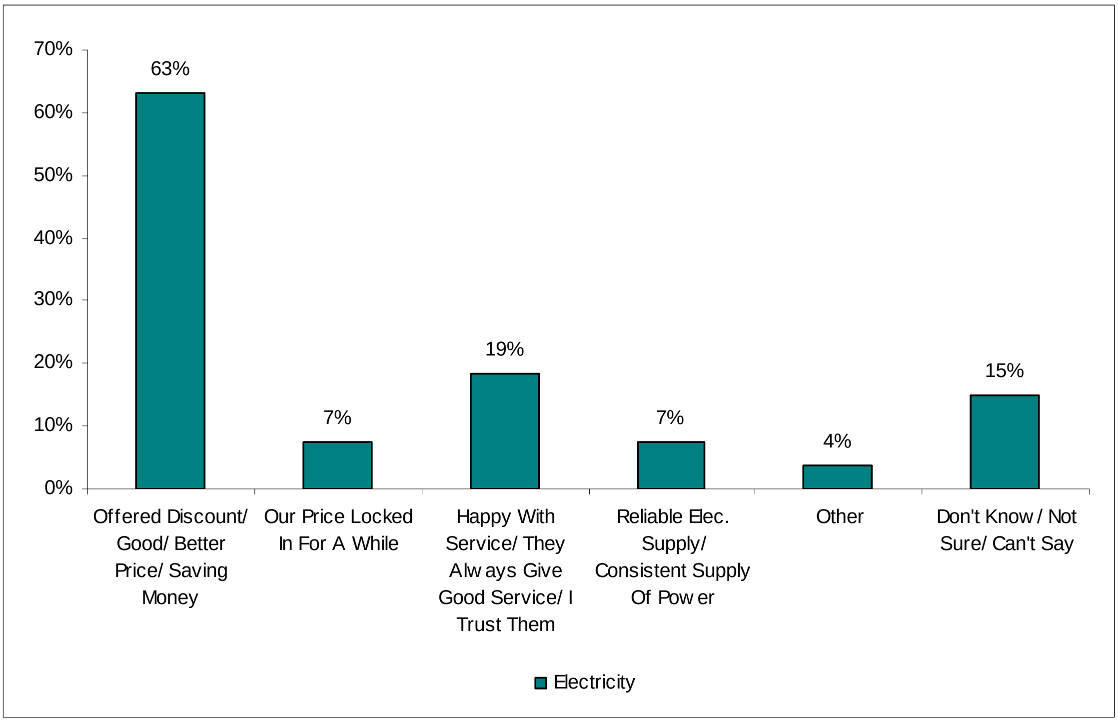


QE29/QG29. How satisfied or dissatisfied are you with your business's new energy supply arrangements?

Base: Total changed any elec. arrangements (n=47); total changed any gas arrangements (n=10)

Reasons for satisfaction are shown in Figure 26 for electricity only; gas was too a small a sub-sample to show (n=5). The most prominent answer category mentioned was discounts.

Figure 26. Reasons for Satisfaction with New Electricity Arrangements

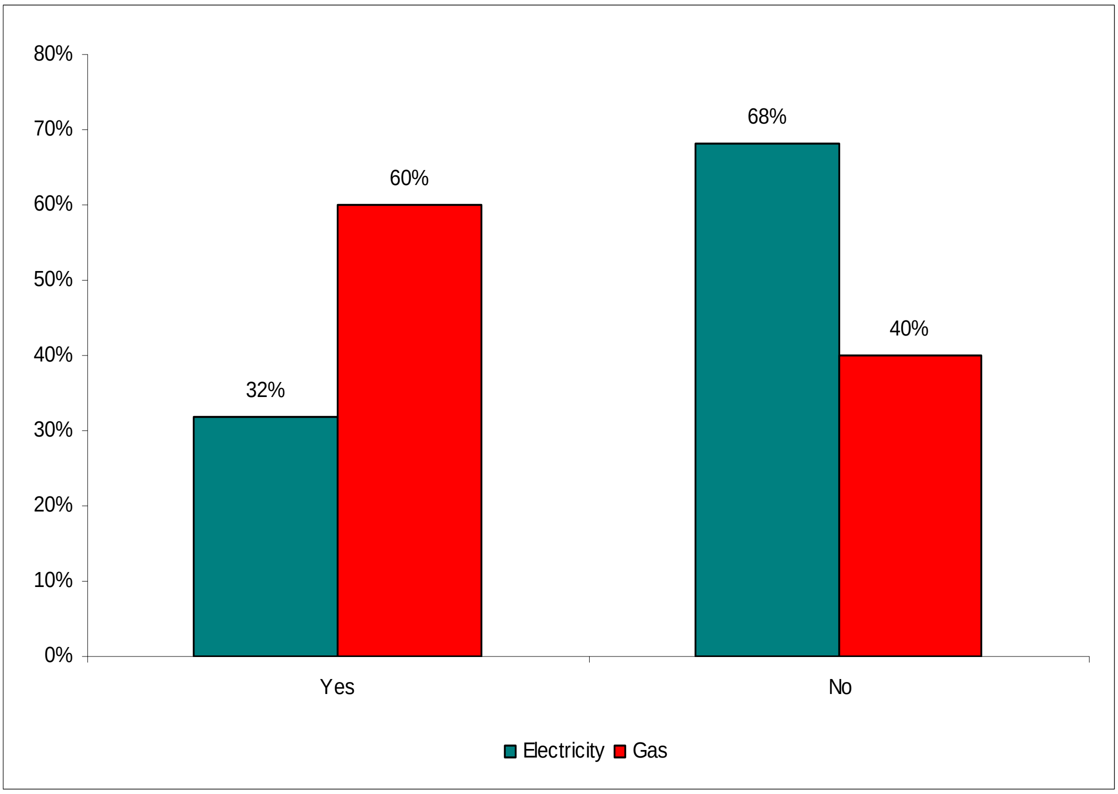


QE31/QG31. Why was your business satisfied?

Base: Total very satisfied or somewhat satisfied (n=27);

Businesses that changed arrangements tended to have checked the competitive pricing of their supplier vs. other suppliers more for gas than electricity, since they last changed (Figure 27). This is somewhat counterintuitive because price issues featured more prominently for electricity than gas. The result may owe to the very small sub-sample size for gas (n=10) which can lead to unusual results.

Figure 27. Checking of Competitive Pricing / Tariffs

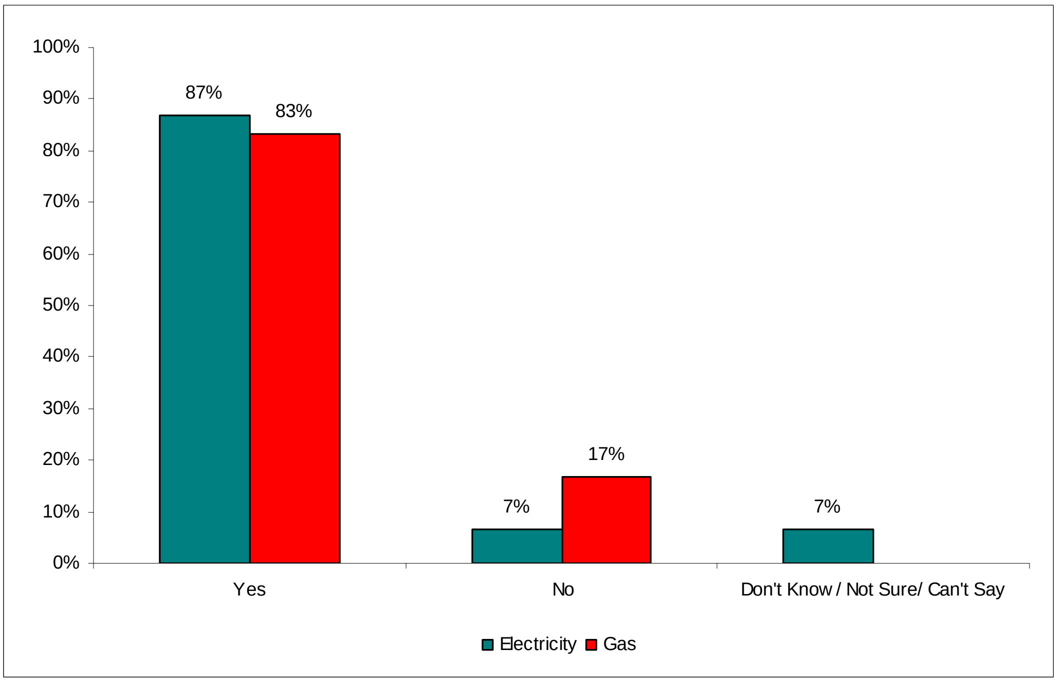


QE32/QG32. In the time since your business last changed energy supply arrangements with the retailer, have you checked whether your current energy price (or tariff) is competitive relative to other energy offers?

Base: Total changed any elec. arrangements (n=47); total changed any gas arrangements (n=10)

Most businesses that did such checking on competitiveness judged their provider to be offering a competitively priced service (Figure 28). However, note that this is based on small sub-samples.

Figure 28. Competitiveness of Pricing

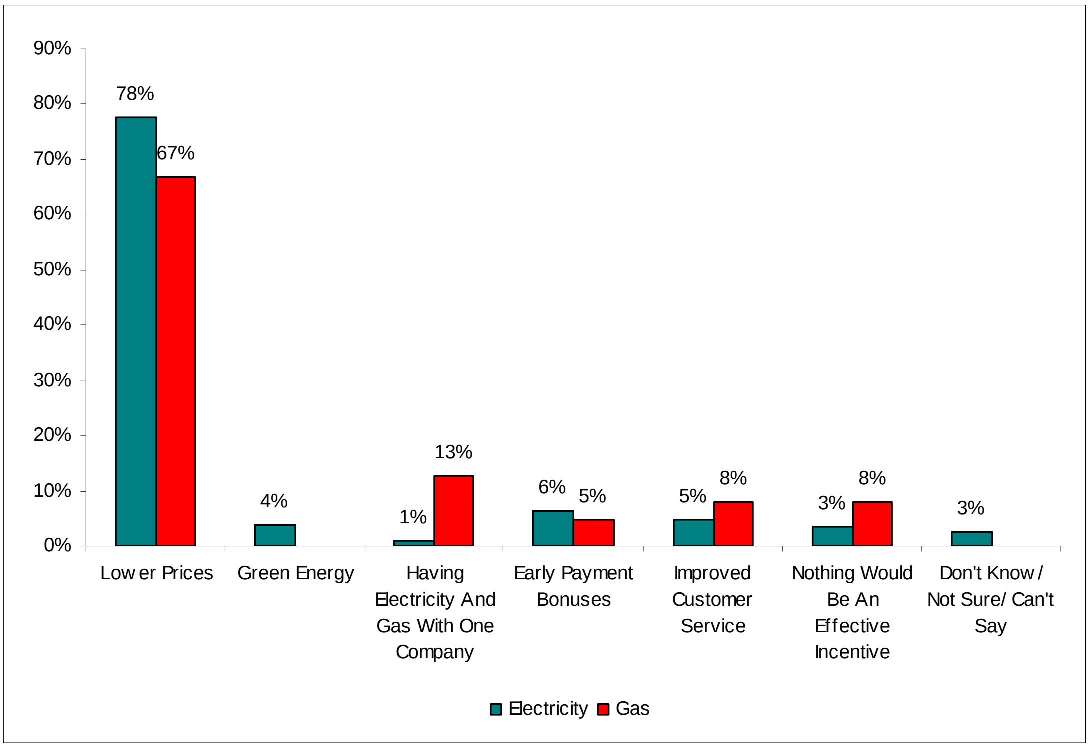


QE33/QG33. Was your business's current energy price (or tariff) competitive relative to other energy offers?

Base: Total checked current energy price or tariff is competitive (n=15); total checked current energy price or tariff is competitive (n=6)

Looking at the businesses that did not switch energy retailers or change arrangements with their current retailer, a question was posed to understand what would be the most effective incentive to encourage changes. Figure 29 illustrates that lower pricing was the clear answer.

Figure 29. Incentives that Encourage Switching or Changing Arrangements



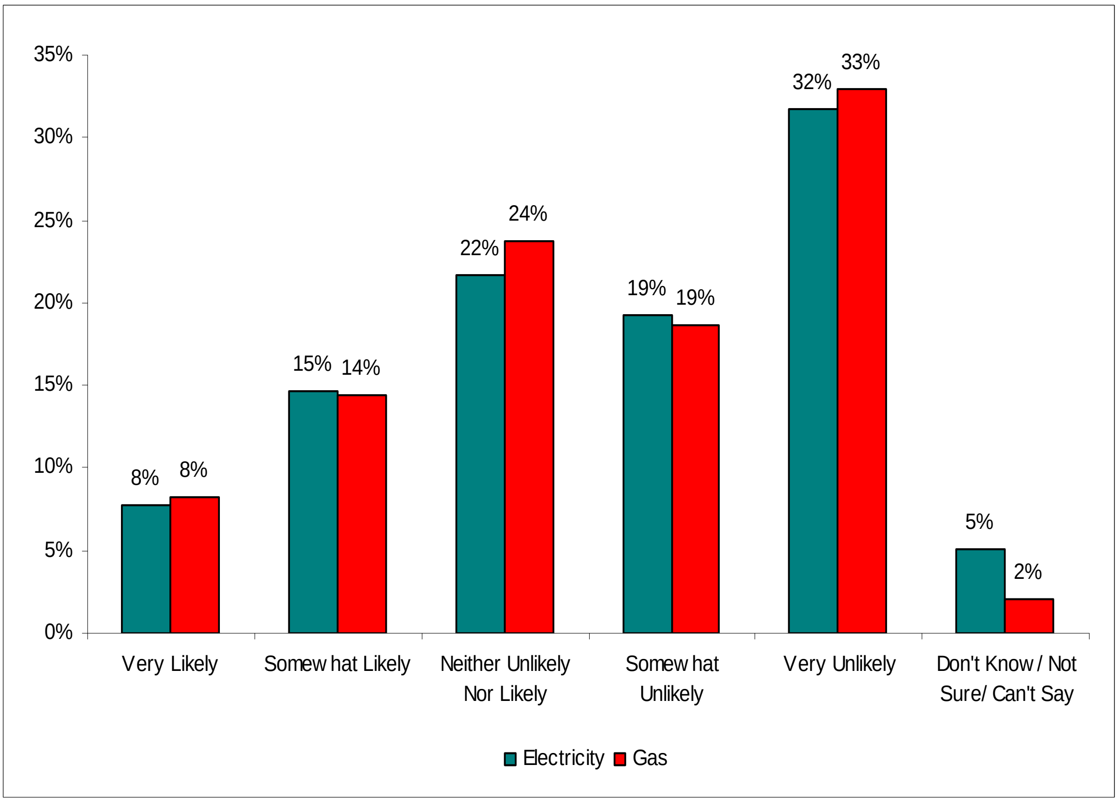
QE35/QG35. Which of the following would be the one most effective incentive to encourage your business to change energy companies or change the way your business buys energy?

Base: Total not changed any arrangements or don't know (n=233); total not changed any arrangements or don't know (n=63)

4.4 Plans/expectation and Information Searches

All businesses were asked if they had plans in the next year to change energy arrangements or look for information pertaining to such a decision. Figure 30 shows that about 1 in 4 did have the plans to change but a majority overall did not. That majority derives more from the non-metro businesses for whom 58% said "somewhat" or "very" unlikely to change compared to 47% for metro.

Figure 30. Plans to Change Energy Arrangements, Next 12 Months

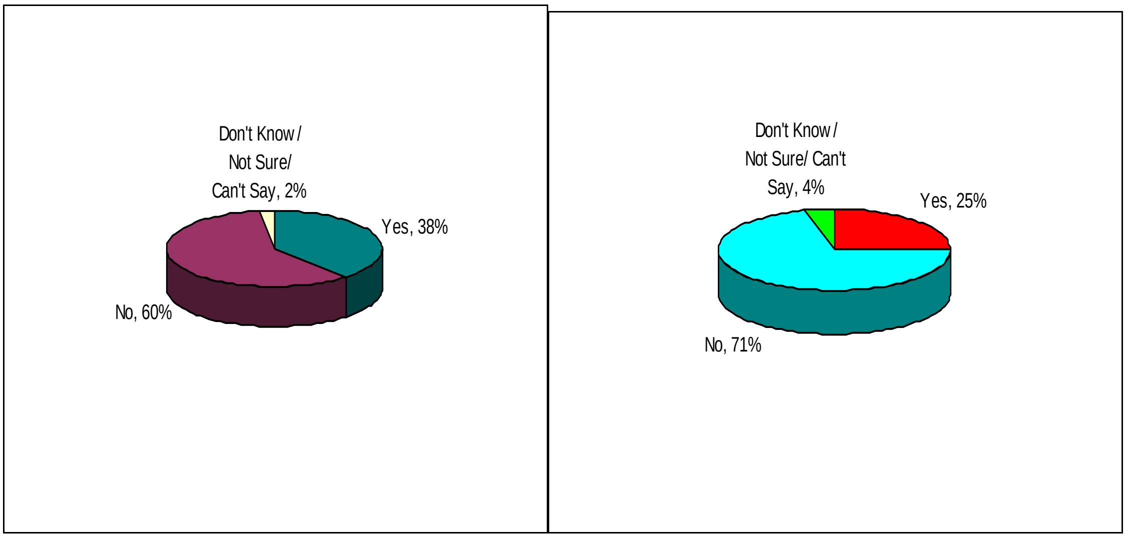


QE37/QG37. In the next 12 months, how likely or unlikely is it that you will change the business's energy supply arrangements with the current energy company?

Base: Total electricity users (n=508); total gas users (n=97)

Figure 31 shows that nearly 40% have at least looked for electricity information in the past 12 months relating to changing energy arrangements. Twenty-five percent have looked for gas-related information.

Figure 31. Looking for Information Related to Changing Companies or Changing Arrangements, Last 12 Months

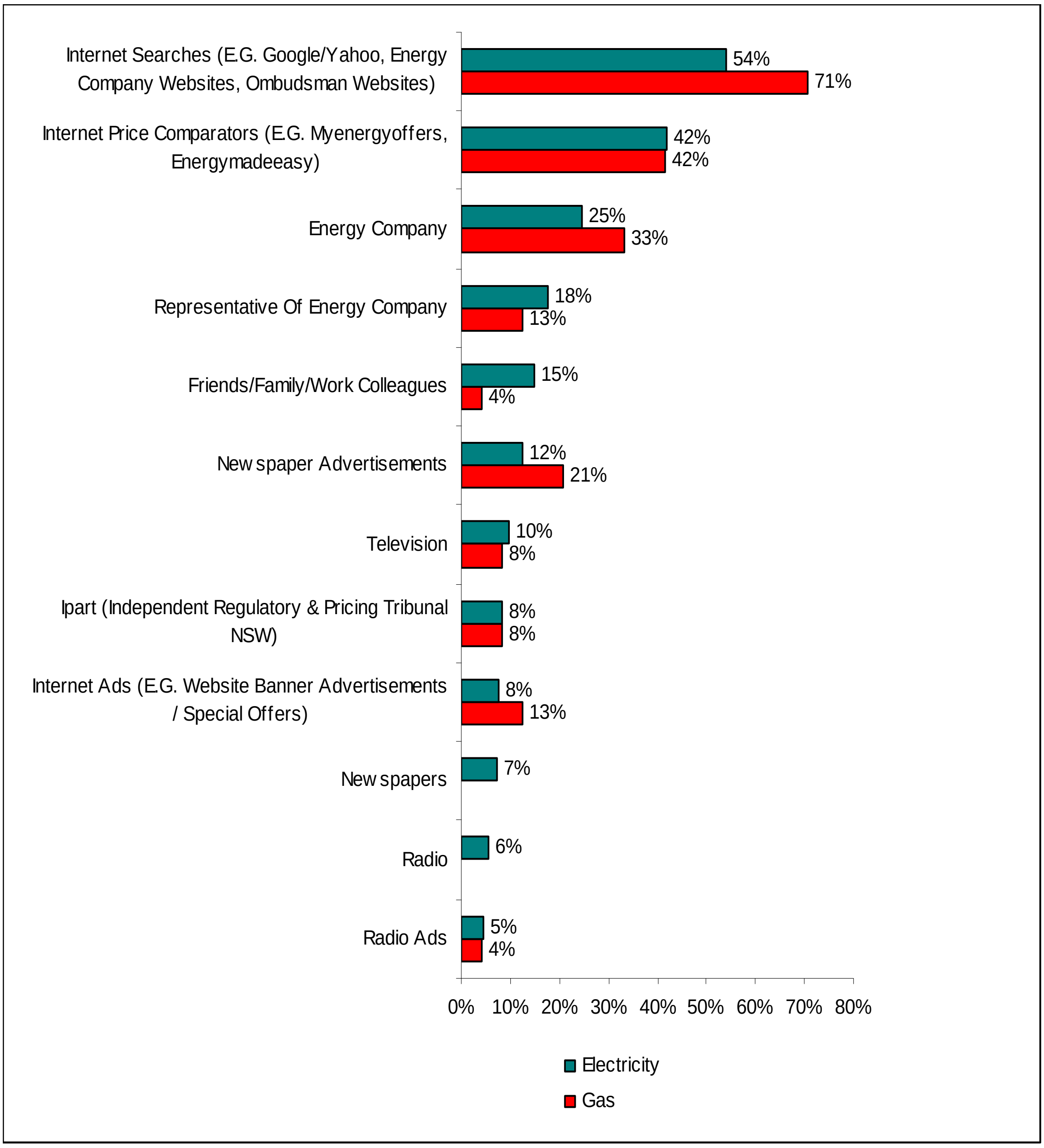


QE38/QG38. Have you looked for any information in the last 12 months to assist you in making a decision about changing your business's energy supply arrangements with an energy supplier, whether the business has taken out a contract or not?

Base: Total electricity users (n=508); total gas users (n=97)

The most common source of the information was the internet (e.g., web searches, price comparisons sites), as seen in Figure 32. After that, energy companies were used as sources, more by gas customers than electricity customers (33% vs. 25%). This may be because businesses using gas were going to their electricity retailer to get a gas deal.

Figure 32. Information Sources used when Looking into Changing



QE39/QG39. What were the sources of the information?

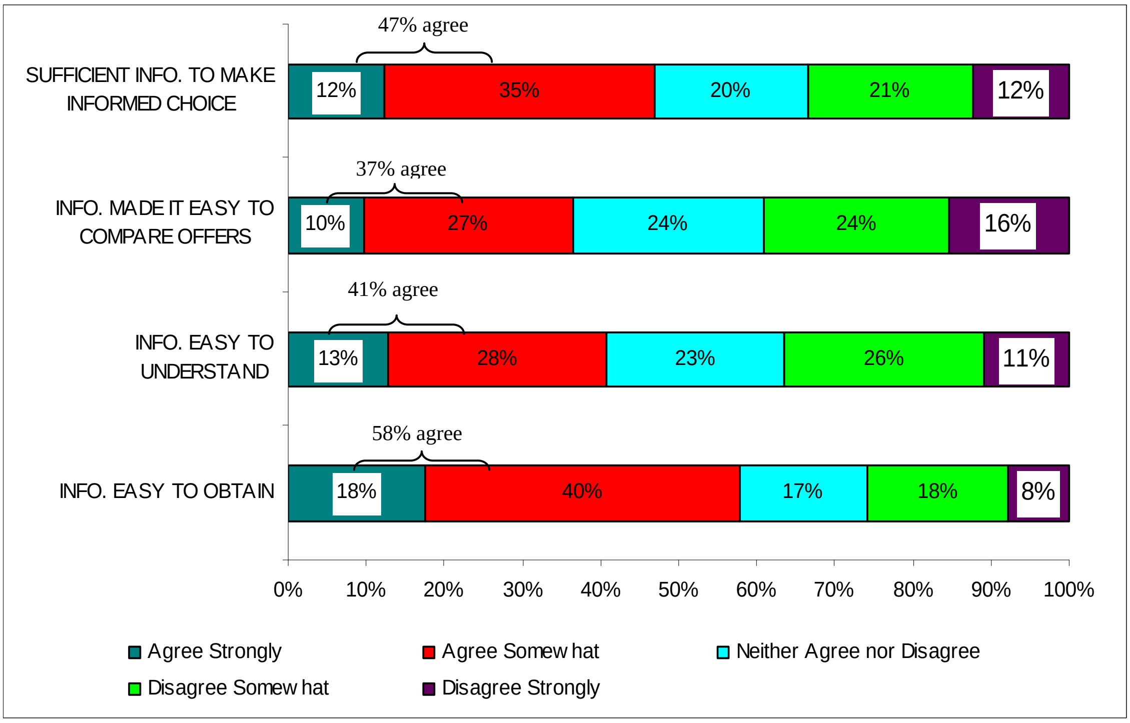
Base: Total looked for elec. info in last 12 months (n=194); total looked for gas info in last 12 months (n=24)

Figure 33-34 show the ratings of the information received/seen/encountered by businesses looking for information for the purpose of changing arrangements. Only "information was easy to obtain" received agreement from a majority of the businesses for electricity. None reached that level for gas. This is a recommended area of attention for the energy companies.

There were a few geographical differences. Thirteen percent of metro businesses said "agree strongly" to "information made it easy to compare offers" vs. only 3% for non-metro. On the other hand, 15% of metro businesses said "disagree strongly" to "sufficient information to make informed choice" compared to 6% for non-metro.

It is interesting to note that although the ratings of the information shown here were not altogether impressive, they were better than the ratings of the information received when the companies approached the business (compare to Figures 7-8). This is perhaps to be expected as here the business itself is "in charge" of selecting the information gathered.

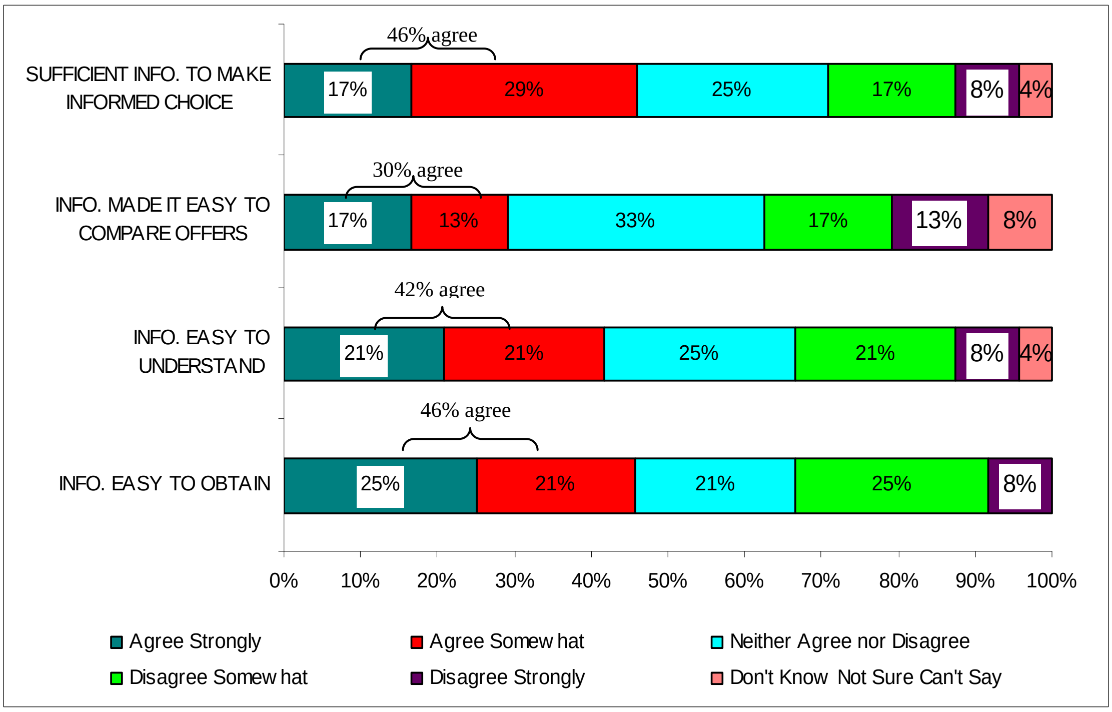
Figure 33. Ratings of Information Obtained about Changing Arrangements with Electricity Company



QE40 (a-d) To what extent do you agree with the following statements?

Base: Total looked for elec. info in last 12 months (n=194)

Figure 34. Ratings of Information Obtained about Changing Arrangements with Gas Company



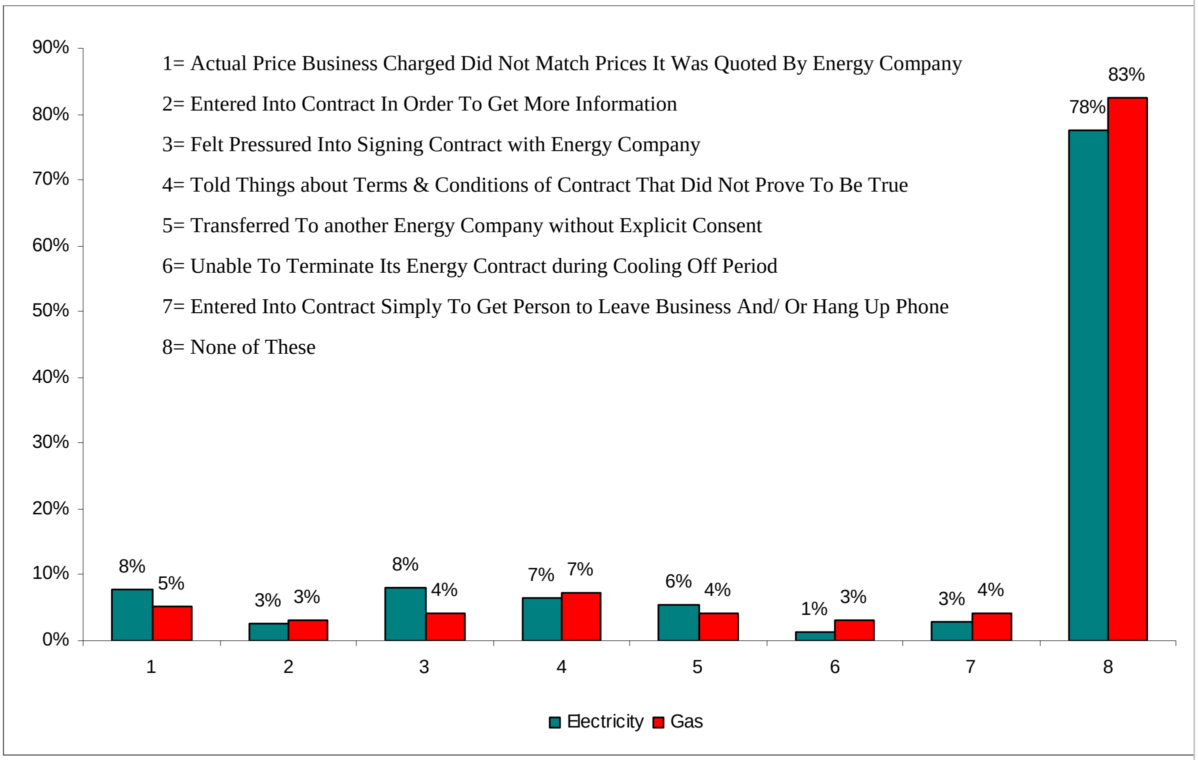
QG40 (a-d) To what extent do you agree with the following statements?

Base: Total looked for info in last 12 months (n=24)

4.5 Other Experiences/Encounters with Energy Retailers

Businesses were asked if they had experienced any of a variety of situations with their energy companies. Examples were pressure to sign or enter into a contract or pricing that did not match promises. Figure 35 shows that about 80% had not experienced any such situation which conversely means that about 20% had. However, no specific example of the category exceeded 10%.

Figure 35. Experiences with Energy Companies

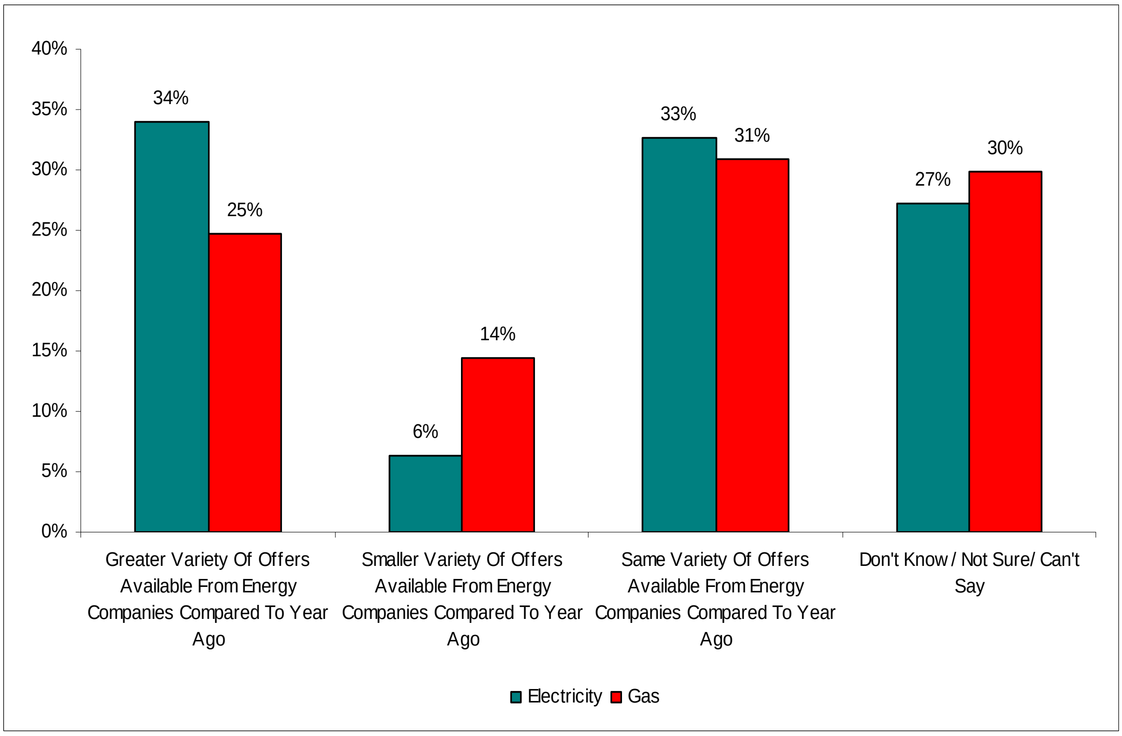


QE42/QG42. Has your business experienced any of the following?

Base: Total electricity users (n=508); total gas users (n=97)

A question about the variety of energy offers available compared to a year ago showed that about 1 in 3 businesses believed that the array of offers available from the energy companies increased in the past 12 months but the same percentage believes the variety had stayed the same (Figure 36). Uncertainty reached 30%. This implies a degree of disengagement from the process and perhaps suggests energy companies could be doing more to publicise their offers and points of differentiation from each other.

Figure 36. Variety of Energy Offers Available Compared to Year Ago



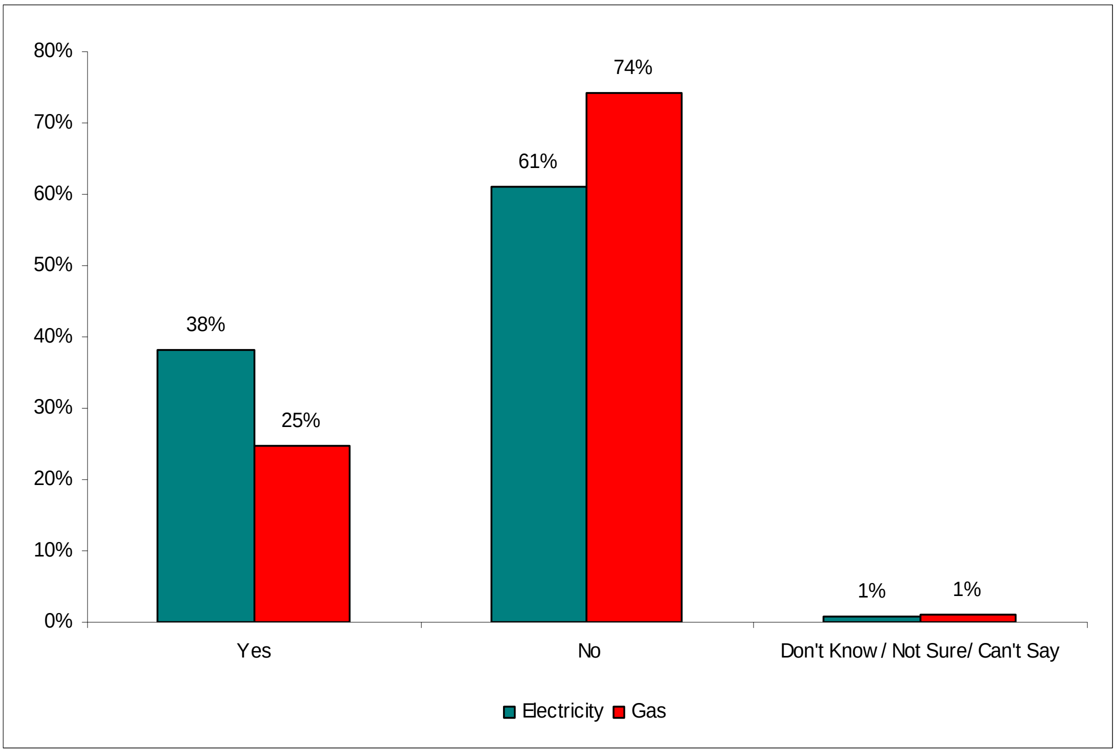
QE46/QG46. Would you say there is….

Base: Total electricity users (n=508); total gas users (n=97)

4.6 Customer Service and Company Contact

Most businesses reported no contact with their suppliers in the past year. The rate of contact though was higher for electricity than gas (38% vs. 25%), as seen in Figure 37. This implies a high level of satisfaction with current retailers. The survey did not ask what the topic of the contact was when it occurred. It may be inferred from the higher rate for electricity that most contacts are about pricing.

Figure 37. Contact with Energy Retailer, Past 12 Months



QE47/QG47. Have you contacted your business's electricity company in the past 12 months?

Base: Total electricity users (n=508); total gas users (n=97)

A majority of those who had such contact with the electricity company reported satisfaction with the timeliness of the response (Table 3). The composition of this satisfaction varied by region. Non-metro businesses were more strongly satisfied (32% "very," vs. 17% for metro) whereas metro businesses favoured the weaker "somewhat satisfied" category 42% compared to 23% for non-metro). Perhaps with fewer customers in non-metro areas retailer are able to achieve faster, more satisfying response times to enquiries from customers.

Satisfaction with the "assistance provided" followed the same pattern as with timeliness. Metro businesses were more likely to be somewhat satisfied (21% "very," 39% "somewhat") compared to non-metro businesses (36% "very," 19% "somewhat").

For gas, satisfaction with timeliness and assistance provided were lower than for electricity.

Table 3. Satisfaction with Response Timeliness and Assistance from Energy Retailer

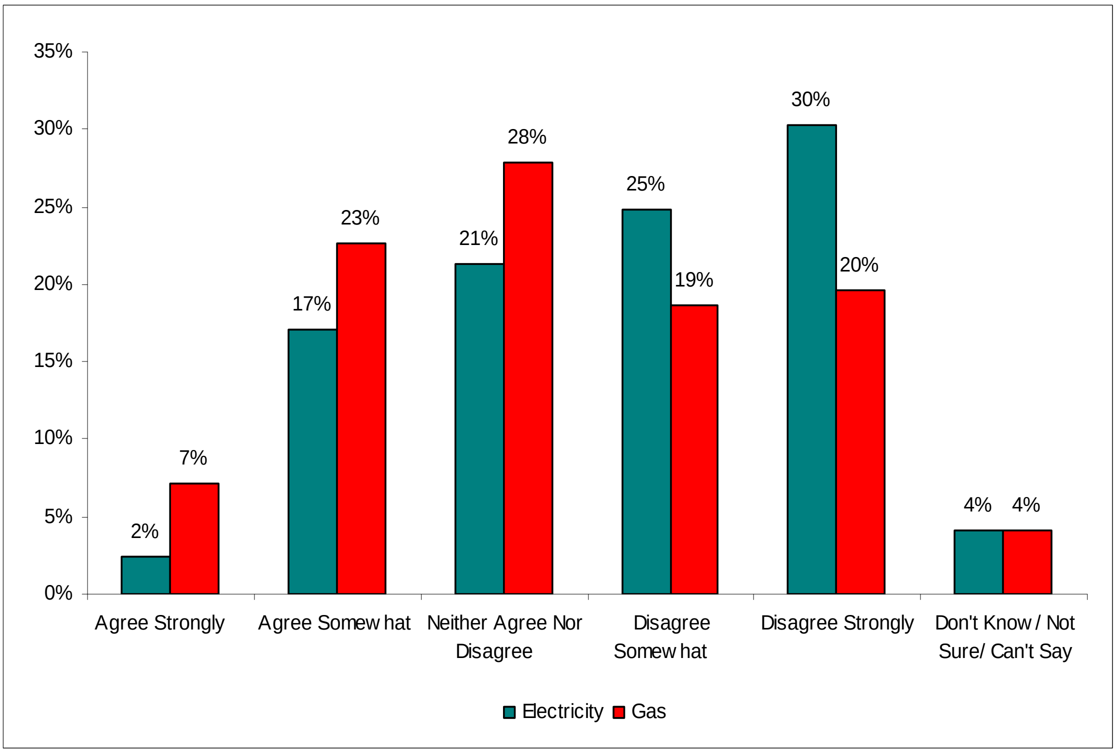
Electricity							
	Very Satisfied	Somewhat Satisfied	**Total Satisfied**	Neither	Somewhat Dissatisfied	Very Dissatisfied	**Total Dissatisfied**
Satisfaction with timeliness of response	23%	35%	58%	20%	14%	8%	22%
Satisfaction with assistance provided.	27%	31%	58%	20%	11%	10%	21%
Gas							
Satisfaction with timeliness of response	8%	25%	33%	38%	8%	21%	29%
Satisfaction with assistance provided.	8%	21%	29%	38%	13%	21%	34%

QE48a-b/QG48a-b. How satisfied were you with…

Base: Total contacted electricity company last 12 months (n=194); total contacted gas company last 12 months (n=24)

About 20% of businesses agreed that their electricity supplier was a useful source of information about new energy appliances; the rate was 30% for gas companies (Figure 38). This mirrors the information seen in Figure 32 concerning sources of information used when looking into changing plan arrangements.

Figure 38. Usefulness of Energy Retailer for Energy Appliance Advice

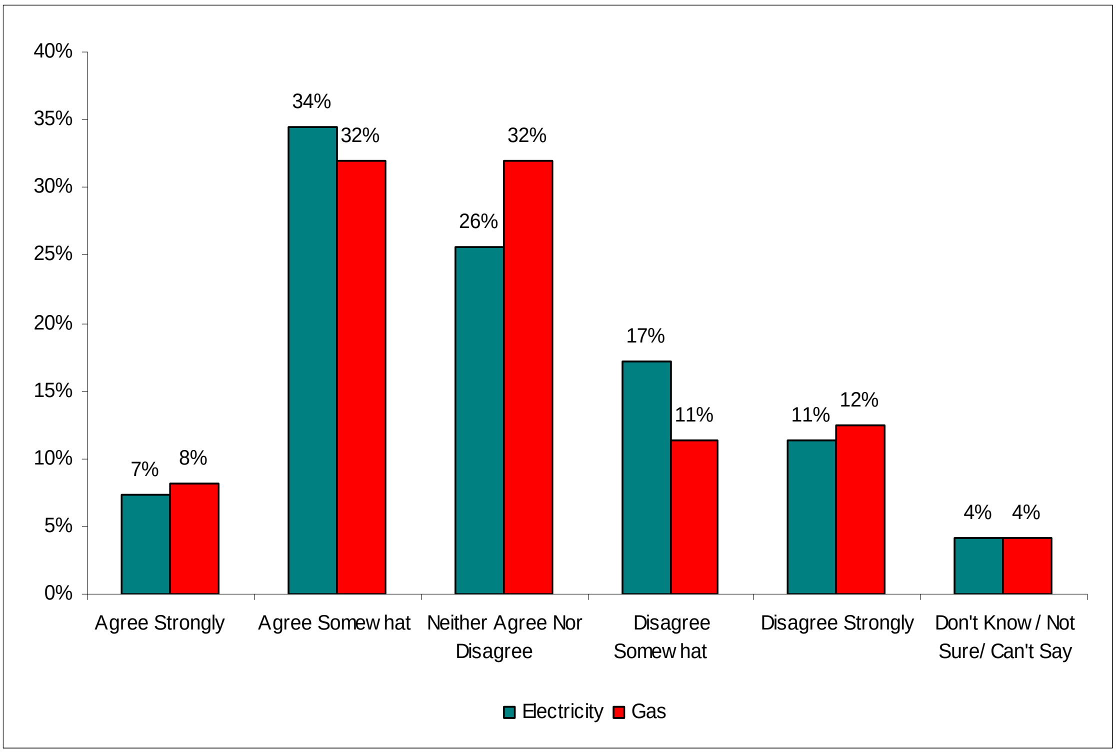


QE49a/QG49a. My business would go to its energy company for advice on purchasing a new energy appliance

Base: Total electricity users (n=508); total gas users (n=97)

Businesses viewed the energy retailers a little more favourably as a source of information on energy efficiency, that is, information not connected specifically to devices/appliances. Agreement rates were nearly 40% for gas and electricity suppliers (Figure 39).

Figure 39. Usefulness of Energy Retailer for Energy Saving Advice

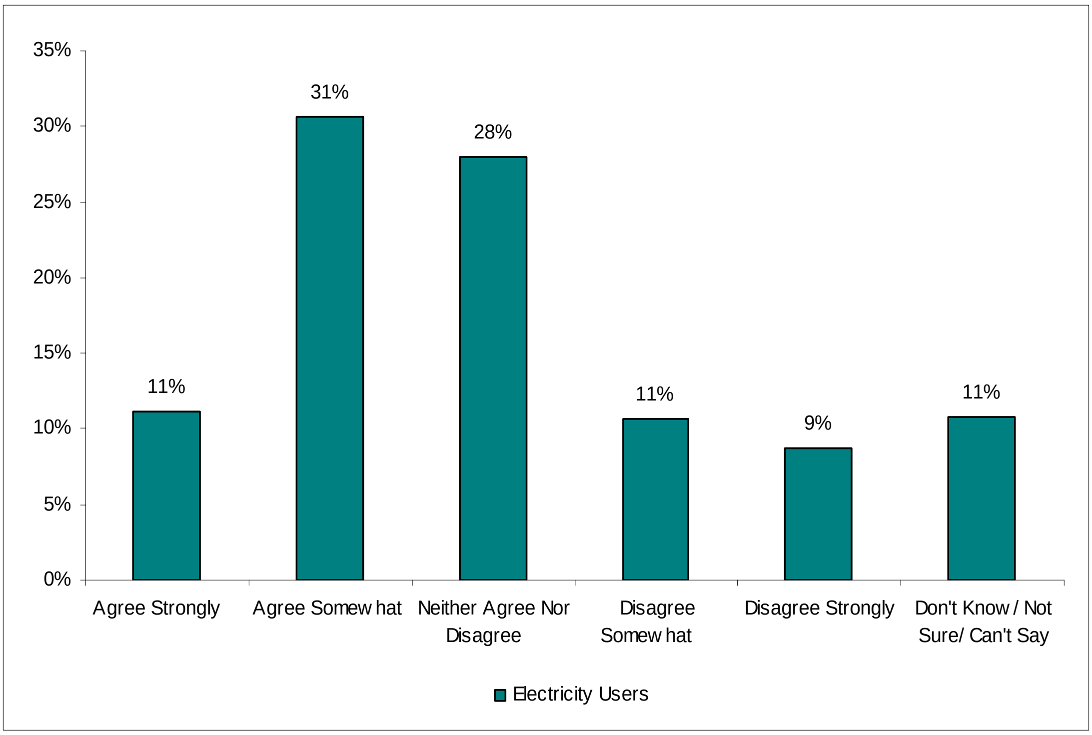


QE49b/QG49b. My business would go to its energy company for advice on improving its energy efficiency and decreasing its energy use

Base: Total electricity users (n=508); total gas users (n=97)

Forty-two percent of businesses felt they could rely on the electricity company for advice on feed-in tariffs (Figure 40). Nearly 30% were neutral.

Figure 40. Advice from Electricity Company on Feed-in Tariff



QE49c.My business would go to its electricity company for advice on feed-in tariffs

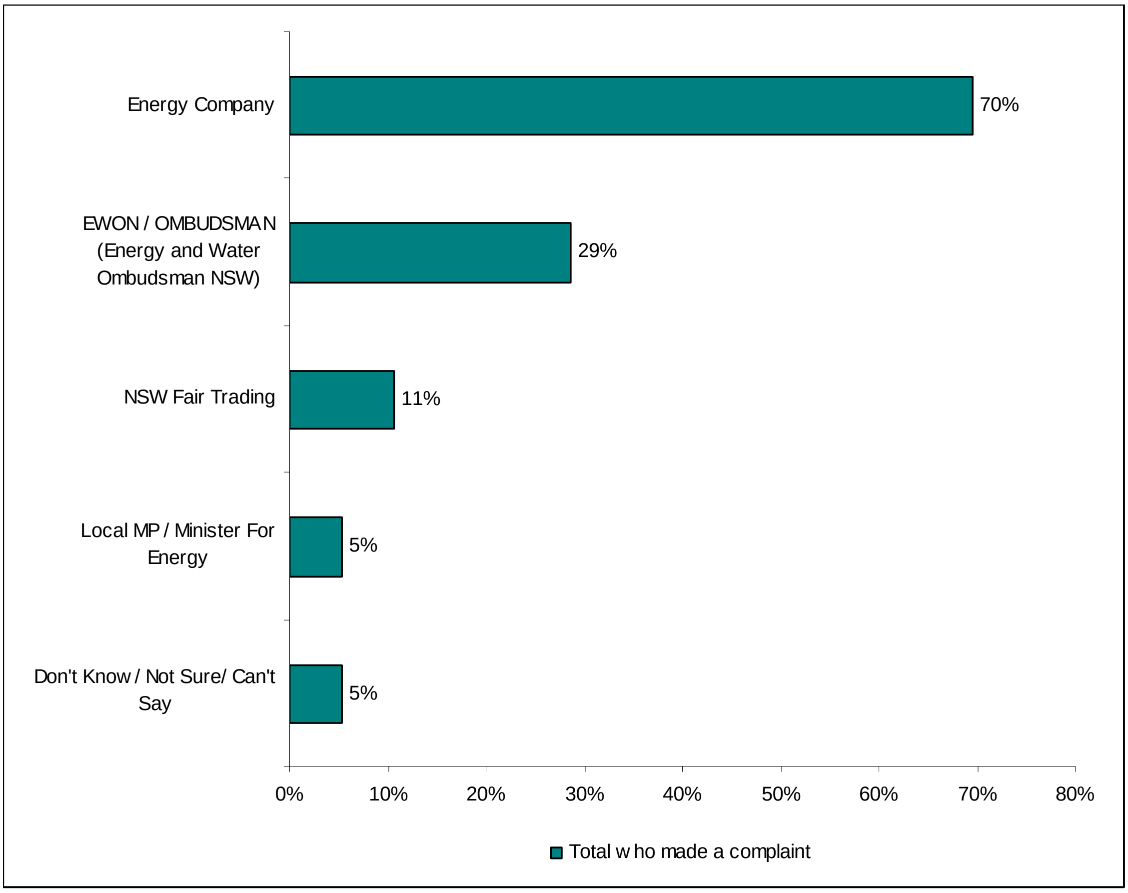
Base: Total electricity users (n=508)

Very few businesses (only 10%) entered into the process of taking out a contract and then used to cooling-off period for the purpose of cancelling the contract.

The incidence of complaints about energy companies was also low. Only 11% reported ever making a complaint about the electricity or gas company.

Seventy percent of the businesses that did complain indicated they complained directly to their energy company (Figure 41). For businesses that had not ever lodged a complaint, the energy company and the Ombudsman/EWON were the two leading choices for who any future complaint might be directed to. Both received mentions by about 40% (Figure 42).

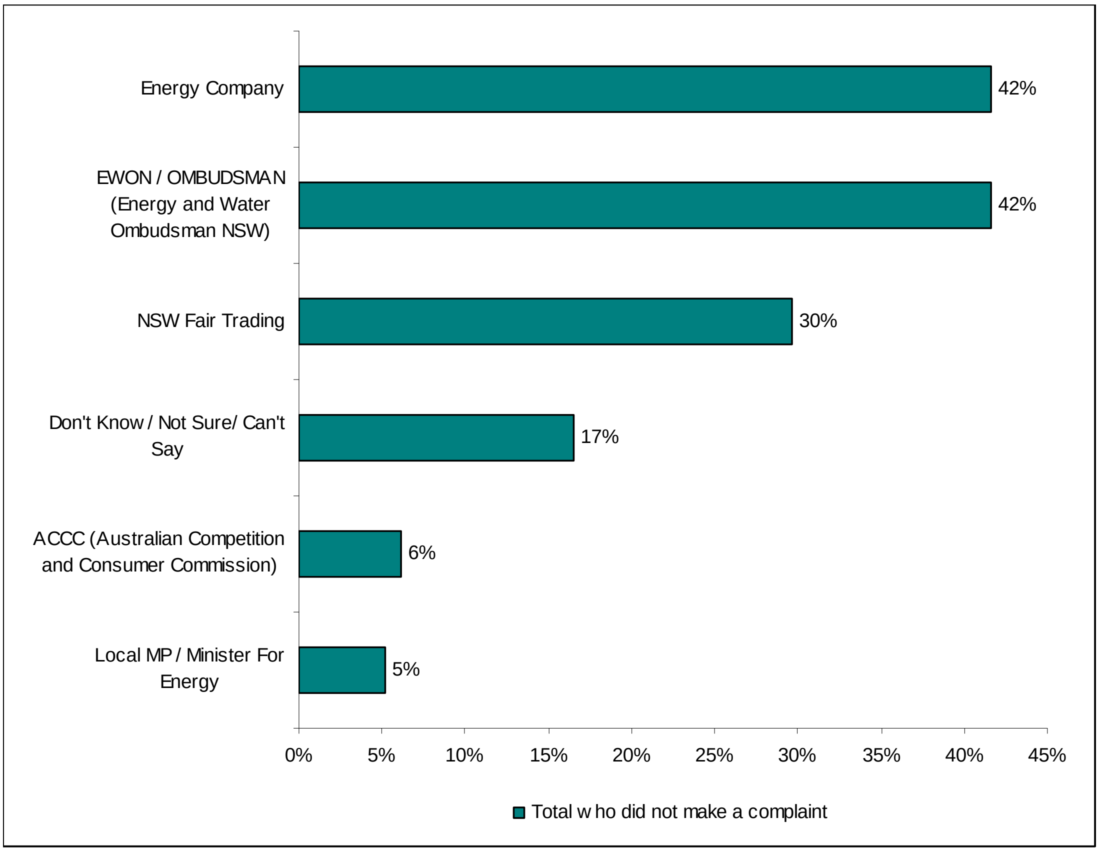
Figure 41. Who Did Business Make Complaint to?



Q44. Who did your business complain to?

Base: Total who made a complaint (n=56)

Figure 42. Who Would you Complain to?



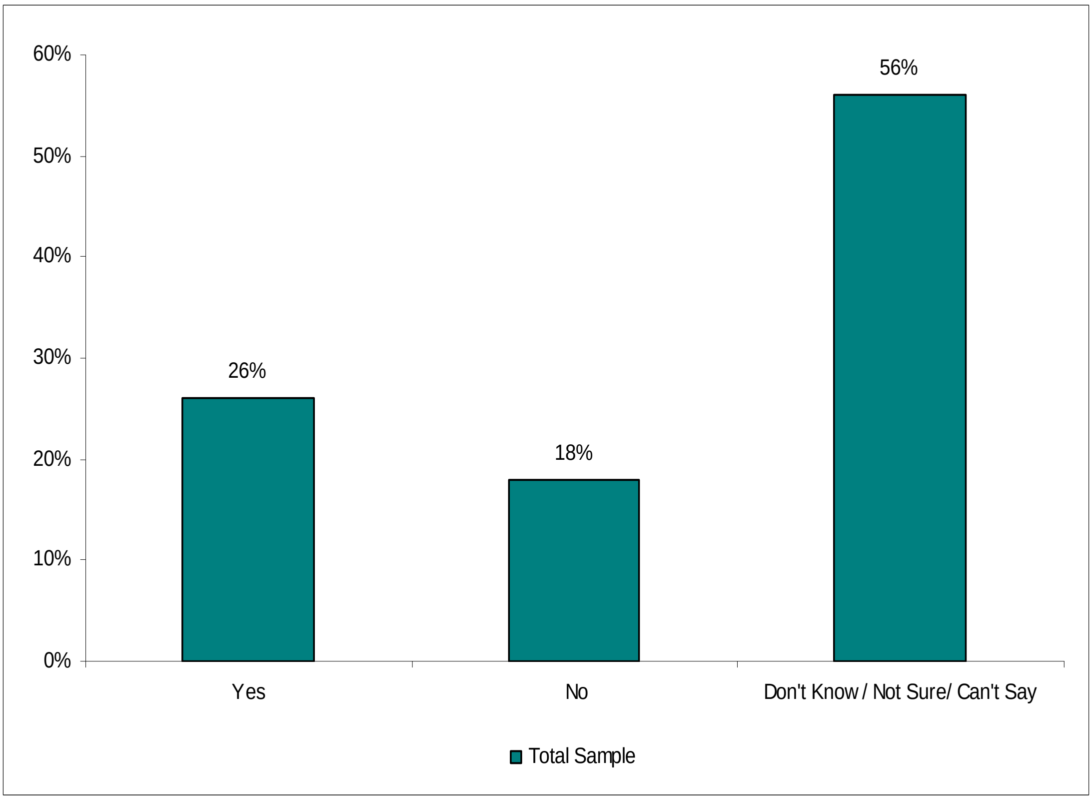
Q45. If your business ever did need to complain about an energy company, who would you go to?

Base: Total who did not make a complaint (n=442)

Note: AEMO (Australian Energy Market Operator) and Friends/ Family/ Colleagues received insufficient responses for charting

A majority of businesses did not know whether they utilized a market or regulated price. Only one in four claimed to know this. This is a concept that needs further promotion/clarification especially if it has practical consequences for business energy costs (Figure 43).

Figure 43. Awareness of Regulated vs. Market Price

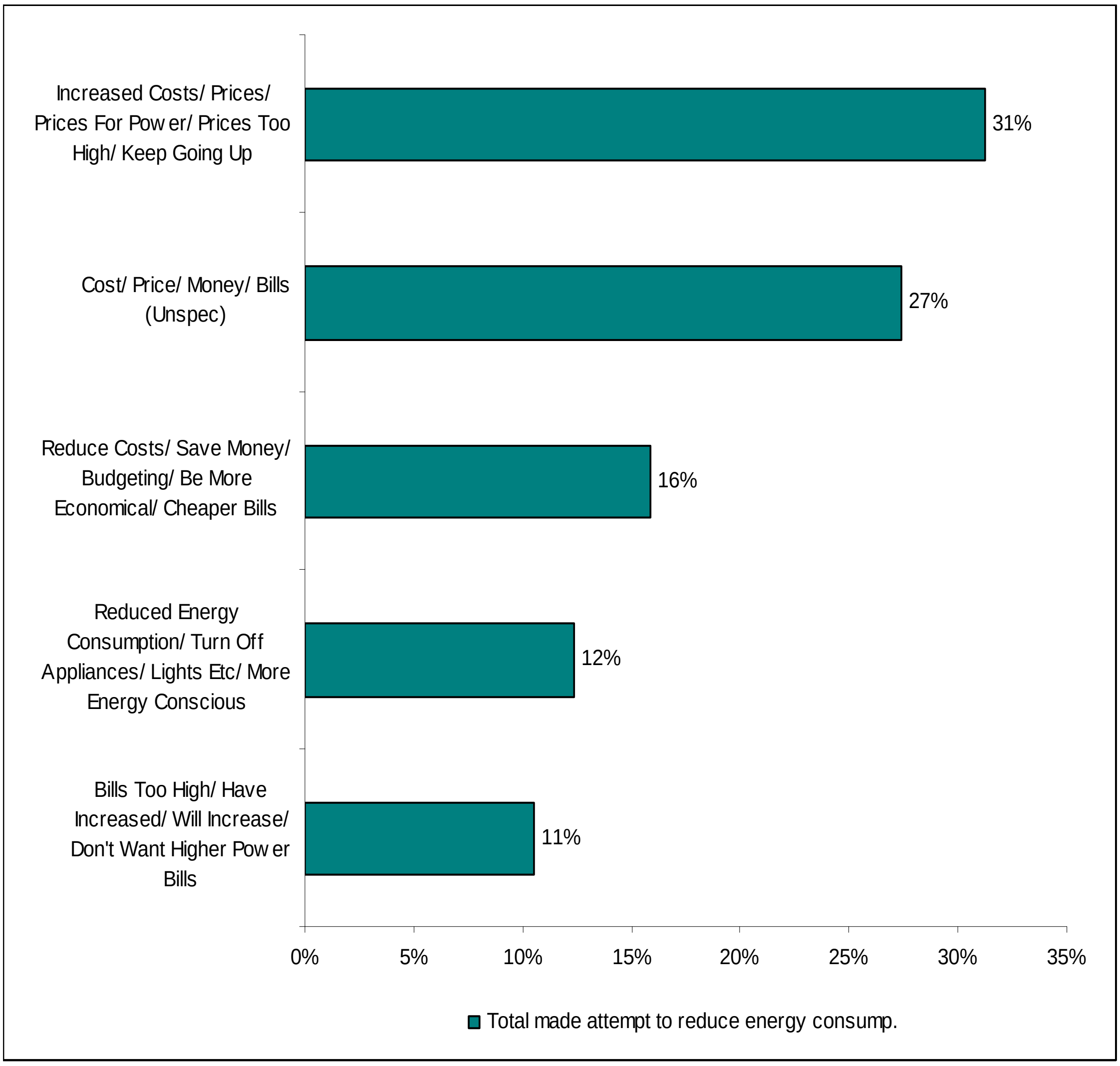


Q49. In terms of the actual unit price (or tariff) at which your business consumes energy, do you know whether this price is a regulated price or a market price?

Base: Total AEMC Business sample (n=509)

Most businesses (73%) made some attempt to conserve energy in the past 12 months but one in four had not. This indicates that interest in saving money through energy conservation is strong because the top three reasons driving the actions relate to monetary savings. These were followed by "energy conservation" (Figure 44). The leading category was mentioned more by non-metro businesses than metro businesses (38% vs. 27%).

Figure 44. Main Factor Causing Energy Saving Actions

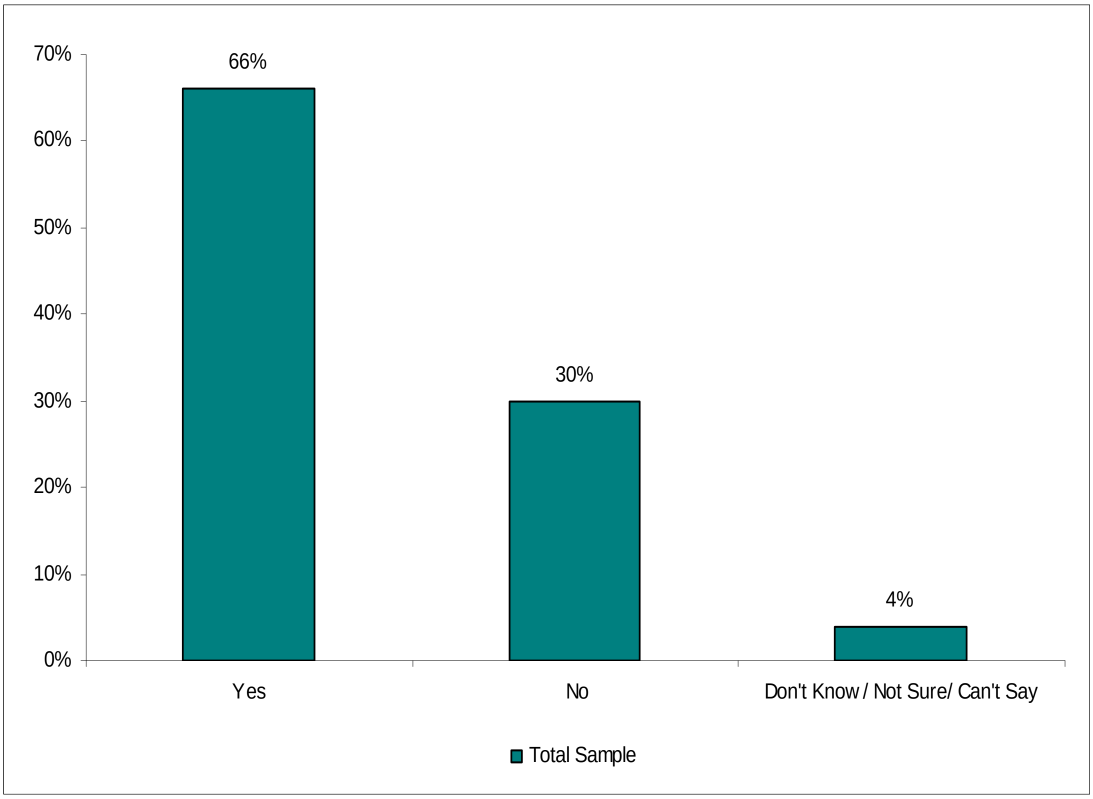


Q51. What was the main factor that influenced your decision to attempt to reduce your business's energy consumption in the last 12 months?

Base: Total made attempt to reduce business's energy consumption (n=372)

Two in three businesses were aware of time-of-day pricing (Figure 45) but only 1 in 4 thought they could take advantage of it (Figure 46). The rate was higher when the business bill was higher (31%) and lower when the bill was lower (20%), suggesting the action is more of an incentive when the saving payoff is larger. Fully 40% are not aware whether they can use it or not. This is a concept that may benefit from better and more information dissemination to businesses.

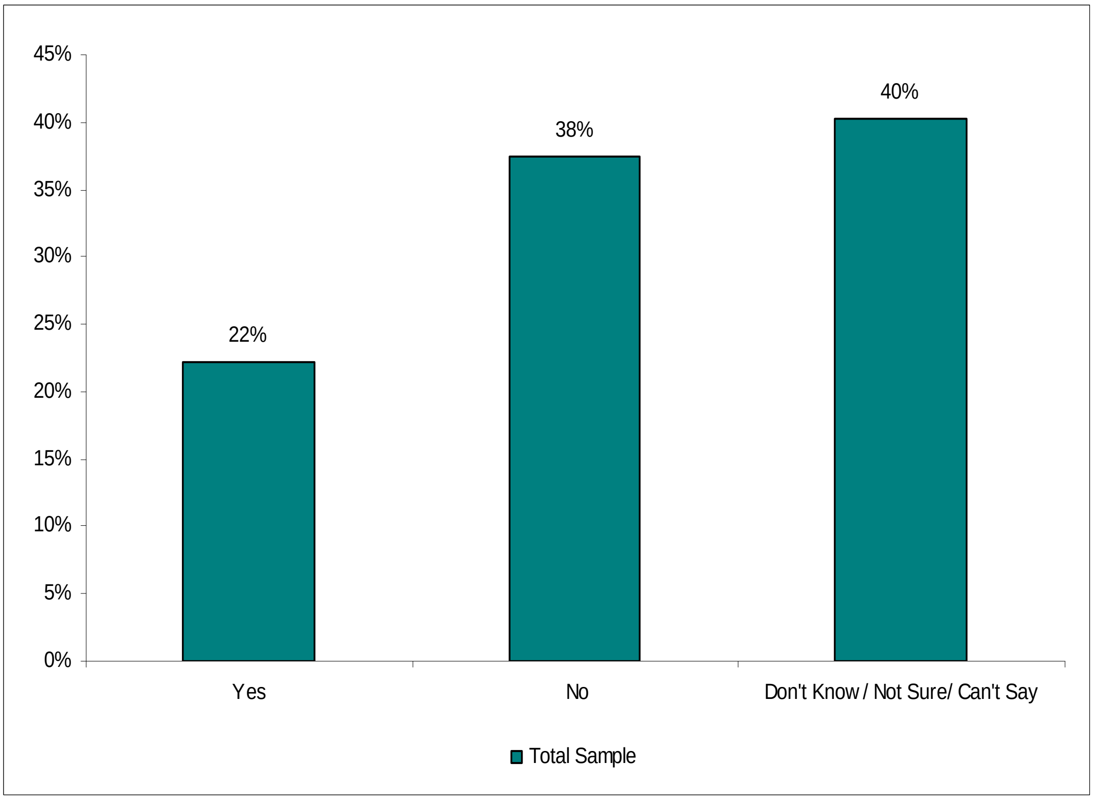
Figure 45. Awareness of Time-of-Day Pricing



Q52. Is your business aware of ‘time of use” pricing – that is, an electricity supply arrangement whereby the price charged by an electricity company varies throughout the day, with the price of electricity being highest in the peak period?

Base: Total AEMC Business sample (n=509)

Figure 46. Can Time-of-Day Pricing be Used by the Business?

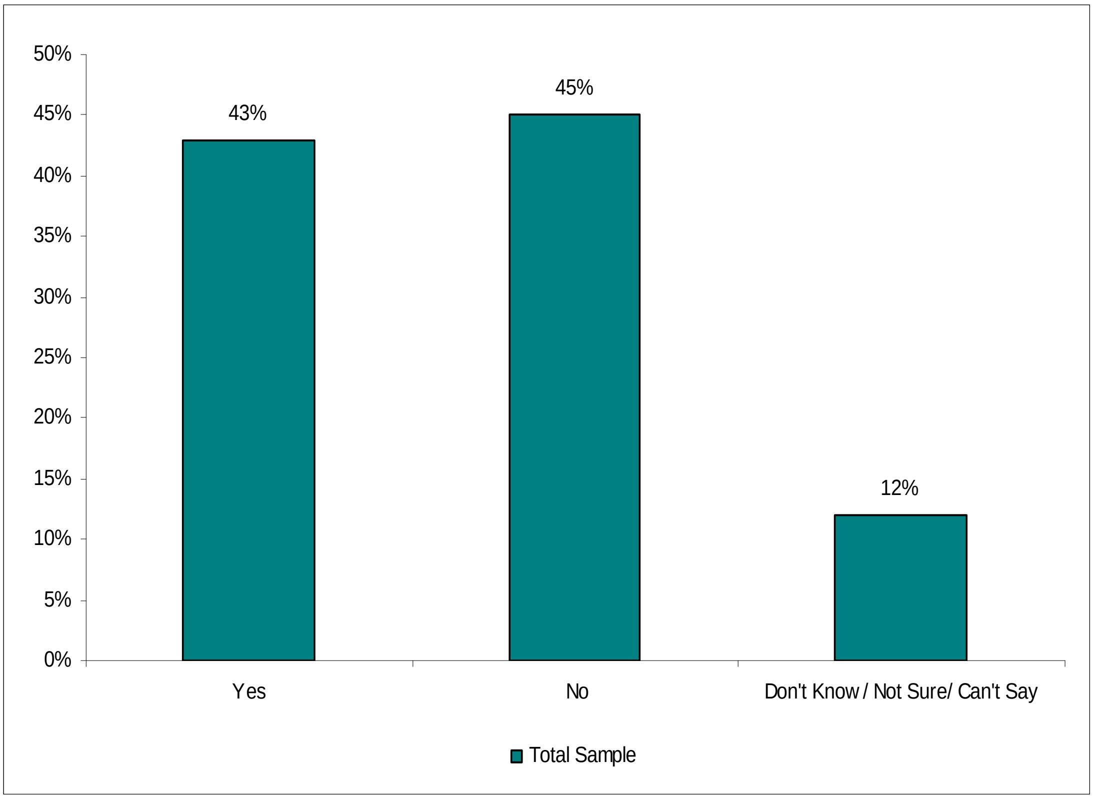


Q53. Does the electricity supply arrangement that your business currently has in place with its electricity company allow for 'time of use' pricing?

Base: Total AEMC Business sample (n=509)

More than 40% of the businesses surveyed indicated they were not aware of any sources of information to assist them on energy pricing comparisons (Figure 47) and 70% were not aware of specific price comparison websites such as MyEnergyOffers (Figure 48). It would be interesting to know how much the rate of supplier switching or plan changing would be altered if information on energy price comparisons were better known or more available.

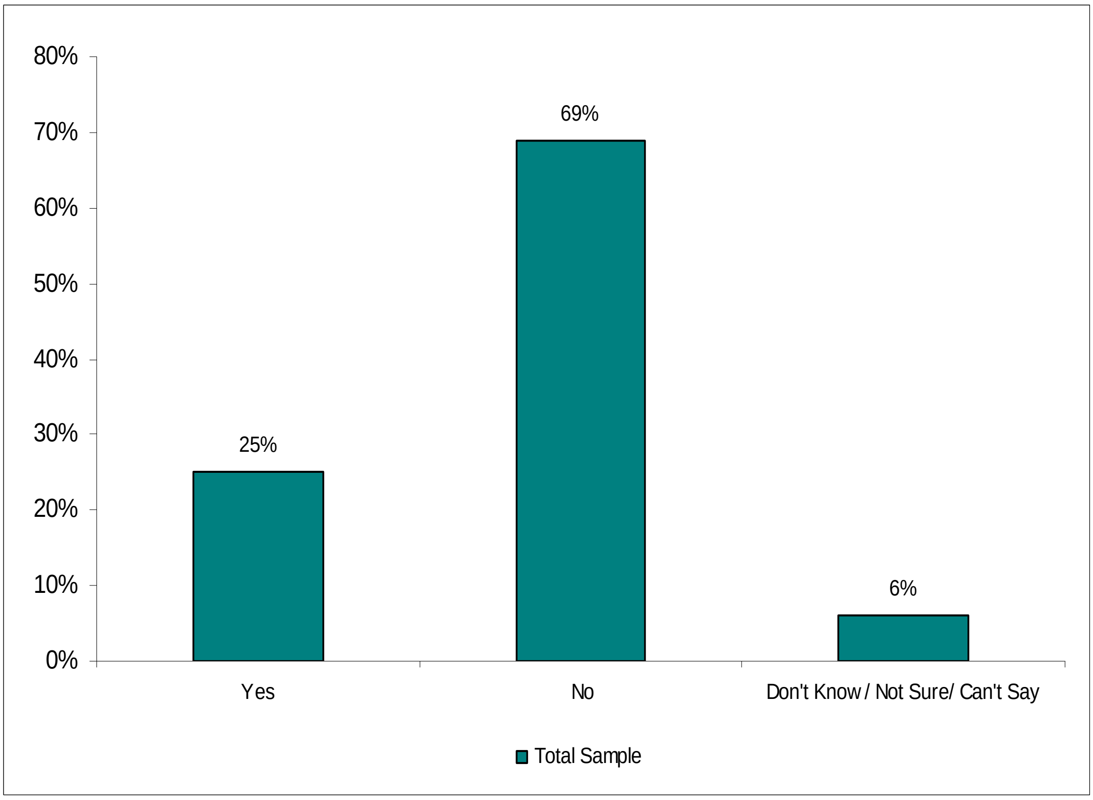
Figure 47. Availability of Assistance on Energy Pricing



Q55. Is your business aware of the availability of any assistance to help in comparing energy prices between retailers and making energy decisions, such as price comparator websites or other energy brokers?

Base: Total AEMC Business sample (n=509)

Figure 48. Price Comparison Websites



Q56. Is your business aware of the availability of the NSW price comparator website, MyEnergyOffers, which is independent, free and may help your business to compare energy prices between retailers?

Base: Total AEMC Business sample (n=509)

5. ADDITIONAL ANALYSES: RE-ASSIGNMENT OF REGIONS

After the report was issued, an alternative regional assignment scheme was suggested placing the Hunter and Illawarra regions in the Metro grouping rather than in the Non-Metro grouping. This reassignment of regions was suggested in light of the PIAC report *Choice? What Choice?*[5] which suggested that customers in Sydney and surrounding areas (including these areas) were exposed to higher levels of competition than customers in regional centres.

Data from several of the business survey questions were re-analysed with Hunter/Illawarra region respondents assigned to the Metro category and removed from Non-Metro category.

The questions examined were:

- awareness of choice of energy supplier – electricity
- approached by electricity company selling electricity
- method of last electricity sales approach
- switched electricity company since 2002
- changed electricity arrangements with current supplier
- awareness of choice of energy supplier- gas
- approached by gas company selling gas
- method of last gas sales approach
- switched gas company since 2002
- changed gas arrangements with current supplier

In five comparisons, shifting Hunter / Illawarra made no difference. The five where it mattered were:

- Last sales approach was door to door - electricity: metro/non-metro was significantly different from the total in the original but was not when changed
- Switched companies since 2002 - electricity: significantly different in the original but not when changed
- Changed arrangement - electricity: not significant in the original but significant when changed
- Can choose company - gas: significant in the original but not when changed
- Was approached by gas comp selling gas: significant in the original but not when changed

[5] PIAC, *Choice? What Choice?*, June 2011

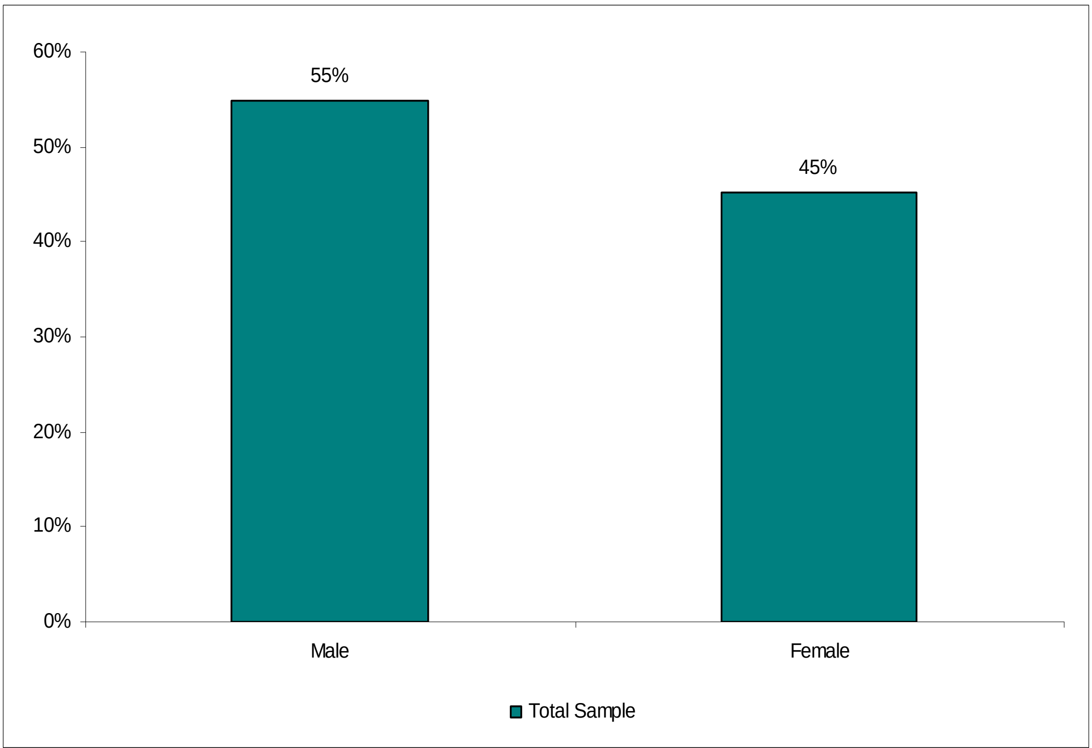
A detailed table comparing the findings prior to and after the reassignment of the two regions can be found in Appendix 1.

6. SAMPLE PROFILE

A few demographic questions were asked of the business respondents. Data are shown in this section.

Figure 49 shows that the sample was well-balanced for male and females.

Figure 49. Respondent Sex

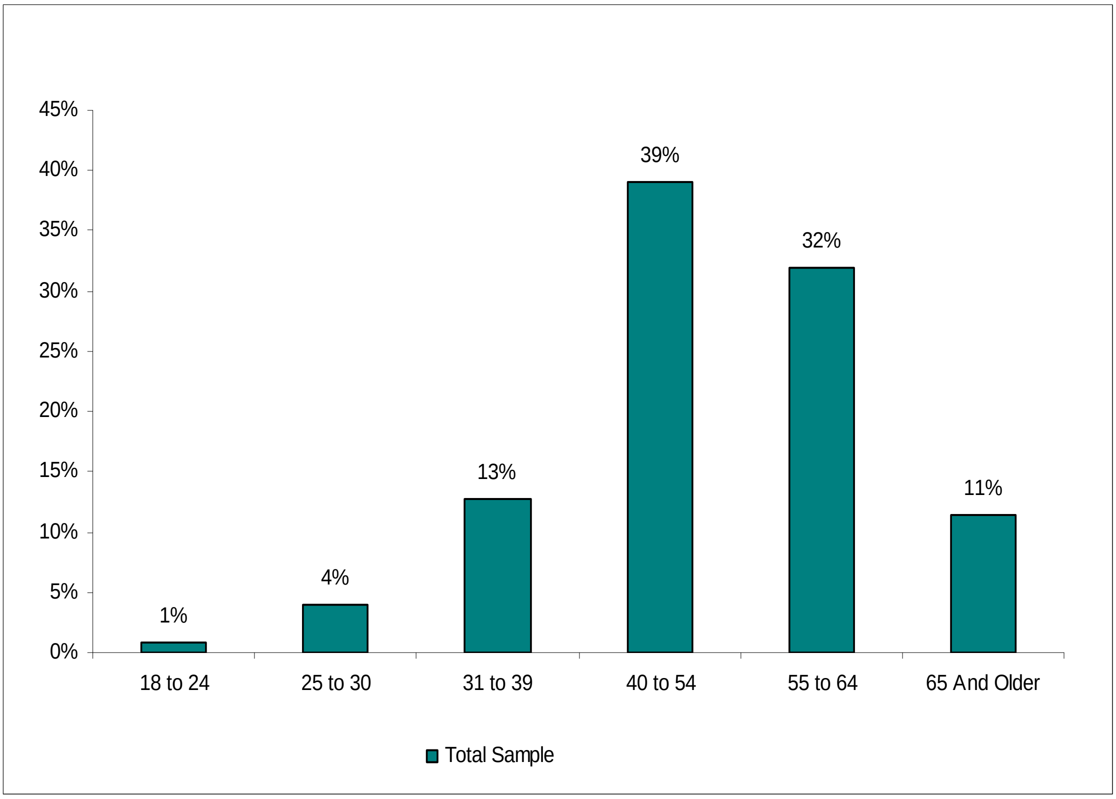


QSEX. Please indicate your sex

Base: Total AEMC Business sample (n=509)

About 70% of the sample fell into the 40-64 year age range (Figure 50).

Figure 50. Respondent Age

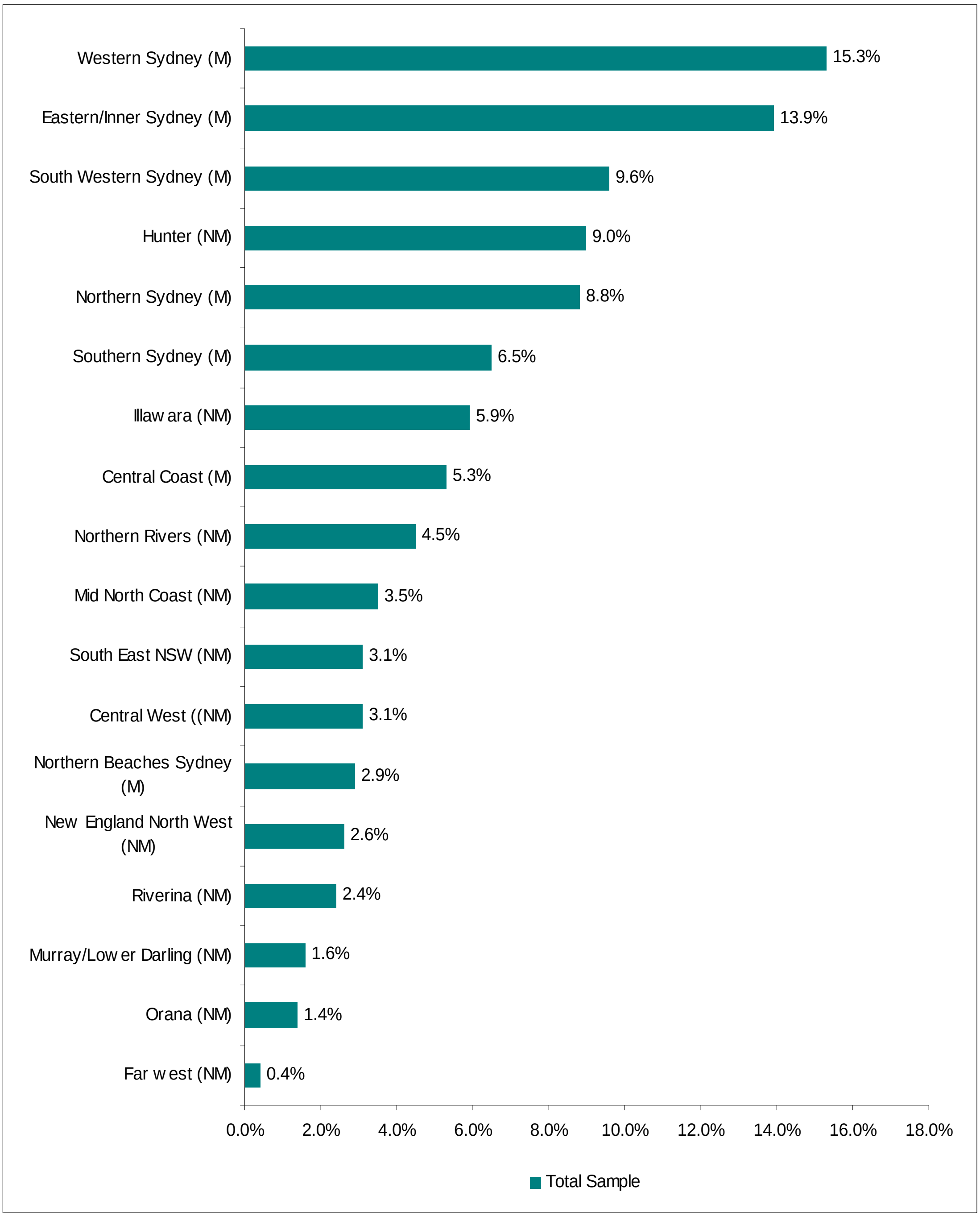


QX5. Please indicate your age

Base: Total AEMC Business sample (n=509)

Figure 51 shows the location of the businesses. This was set up as a quota to reflect state population figures.

Figure 51. Business Location by State Region (M=Metro, NM=Non-metro)

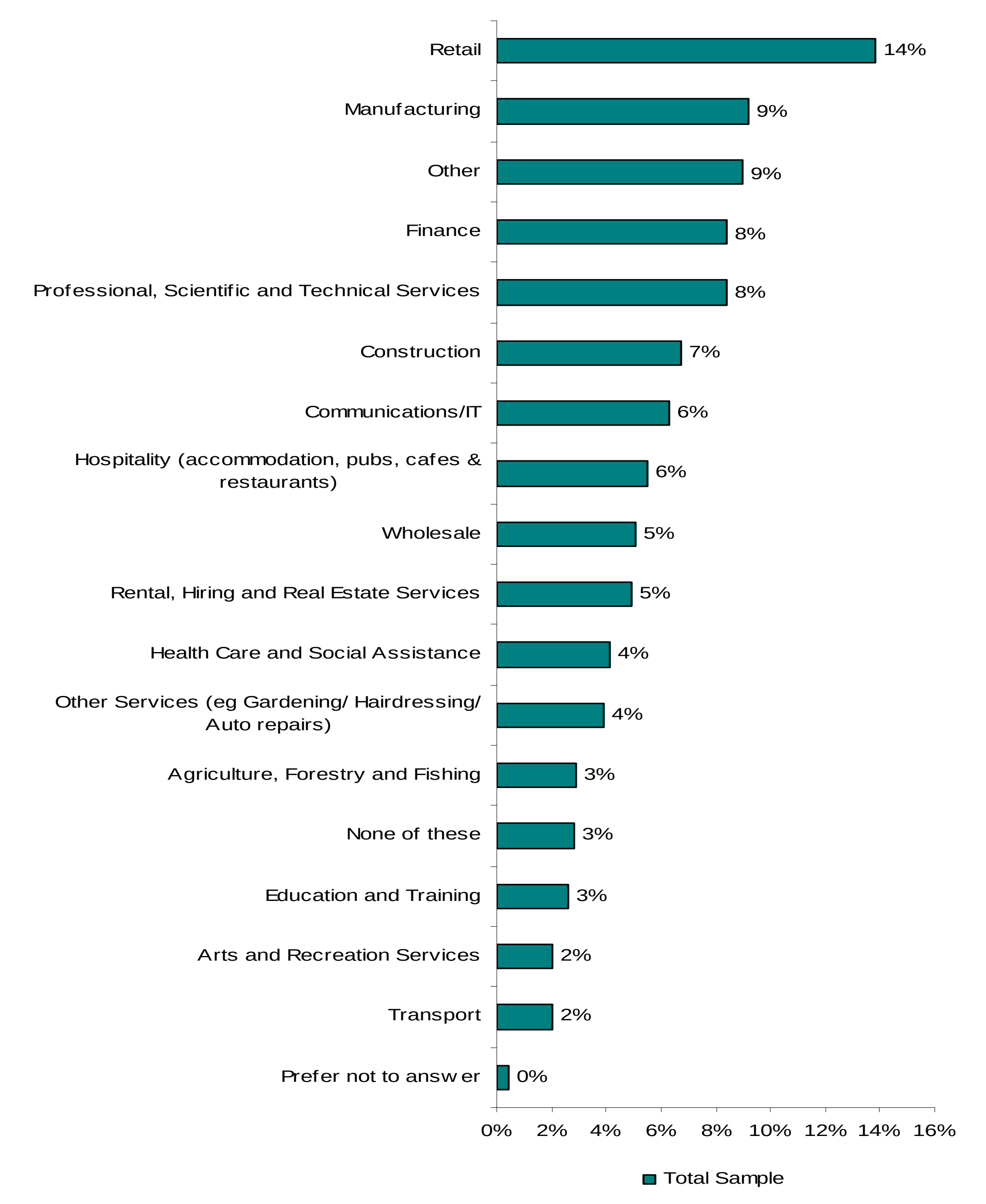


QX8. Please indicate your postcode

Base: Total AEMC Business sample (n=509)

The industry groups represented by the sample are shown in Figure 52. Retail was the leading response.

Figure 52. Industry Category of Business

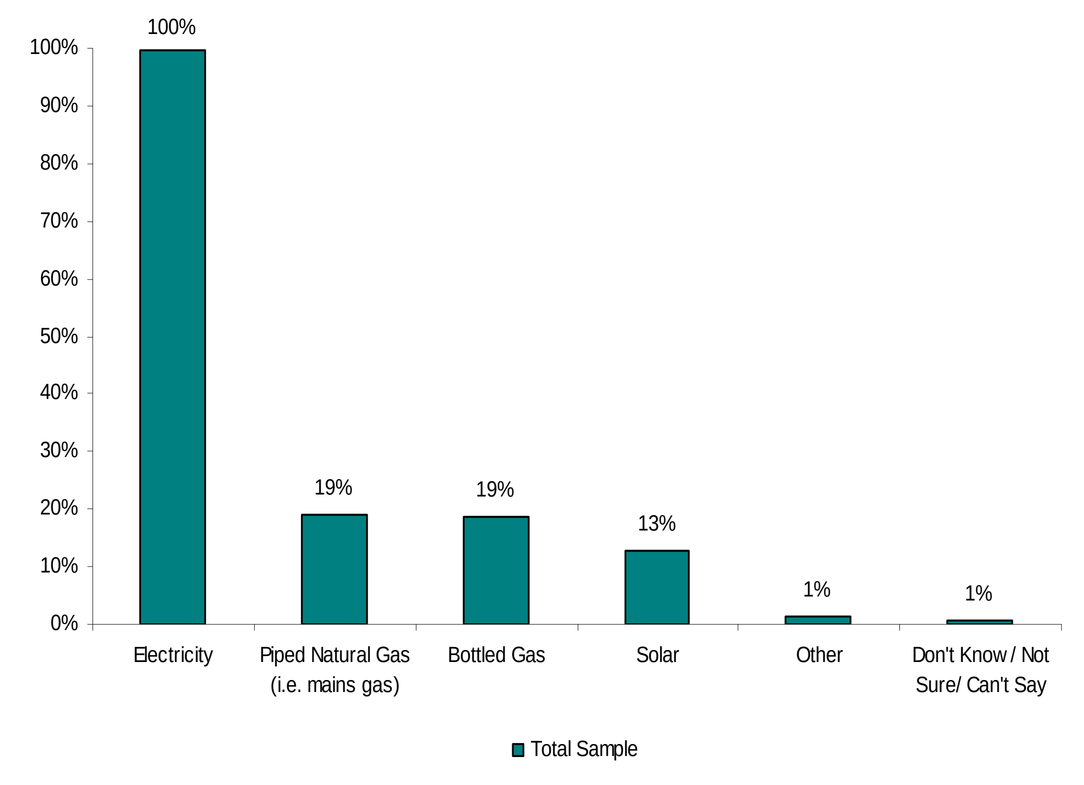


QS1. Please indicate what type of business you are in

Base: Total AEMC Business sample (n=509)

Figure 53 shows the energy sources used by the businesses. One business claimed not to use electricity but due to rounding 100% is shown here. They qualified for the study because they used gas.

Figure 53. Energy Sources Used

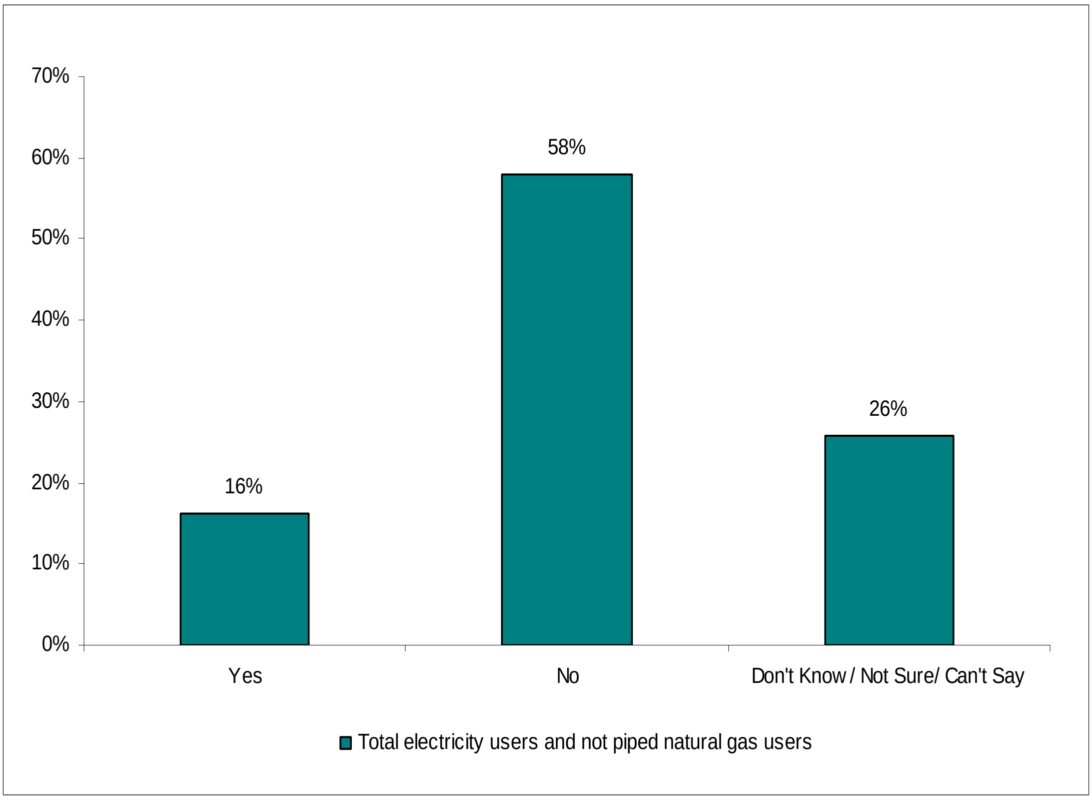


QS2. What types of energy does your business use?

Base: Total AEMC Business sample (n=509)

Businesses not using gas were asked if they knew whether they could connect to gas. Only 16% indicated that they could (Figure 54).

Figure 54. Ability to Connect to Gas

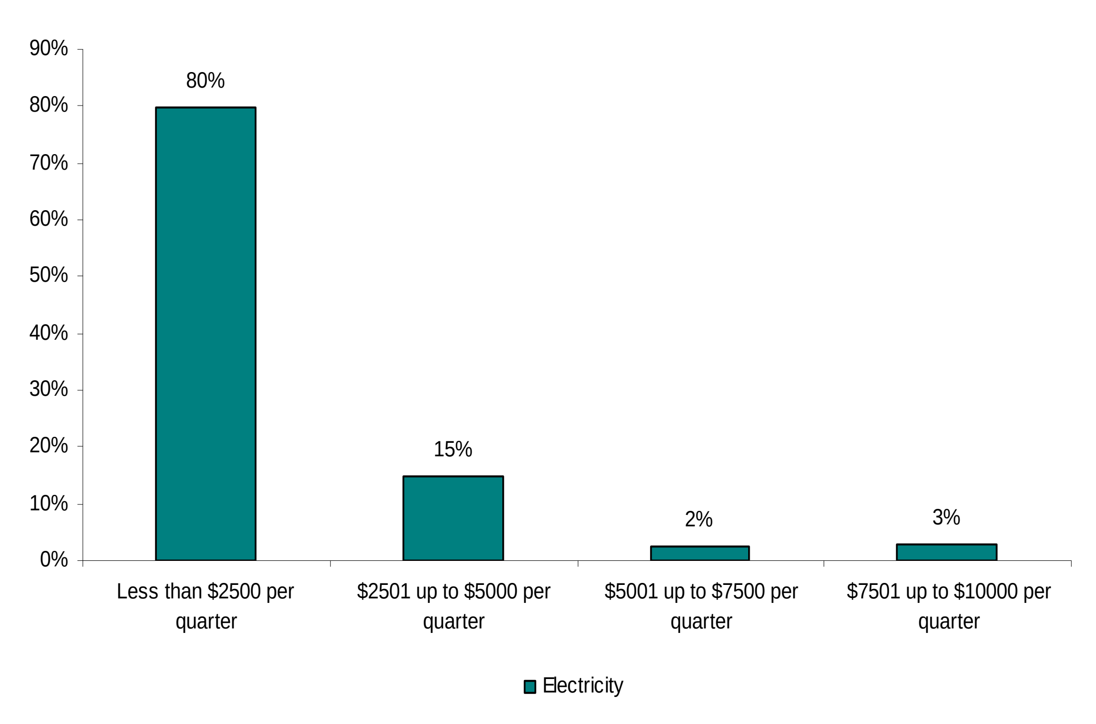


QS2a. Are you able to connect to piped natural gas at your current business?

Base: Total electricity users and not piped natural gas users (n=412)

As part of the screening criteria, businesses were asked how much their most recent electricity and gas bills were. Amounts over $10,000 per quarter for electricity and $4,250 per quarter for gas disqualified the business as these were the cut-offs for consideration as a "small user" of energy (Figure 55-56). Eight in ten businesses surveyed had an electricity bill under $2,500 per quarter and a gas bill less than $1,250 per quarter.

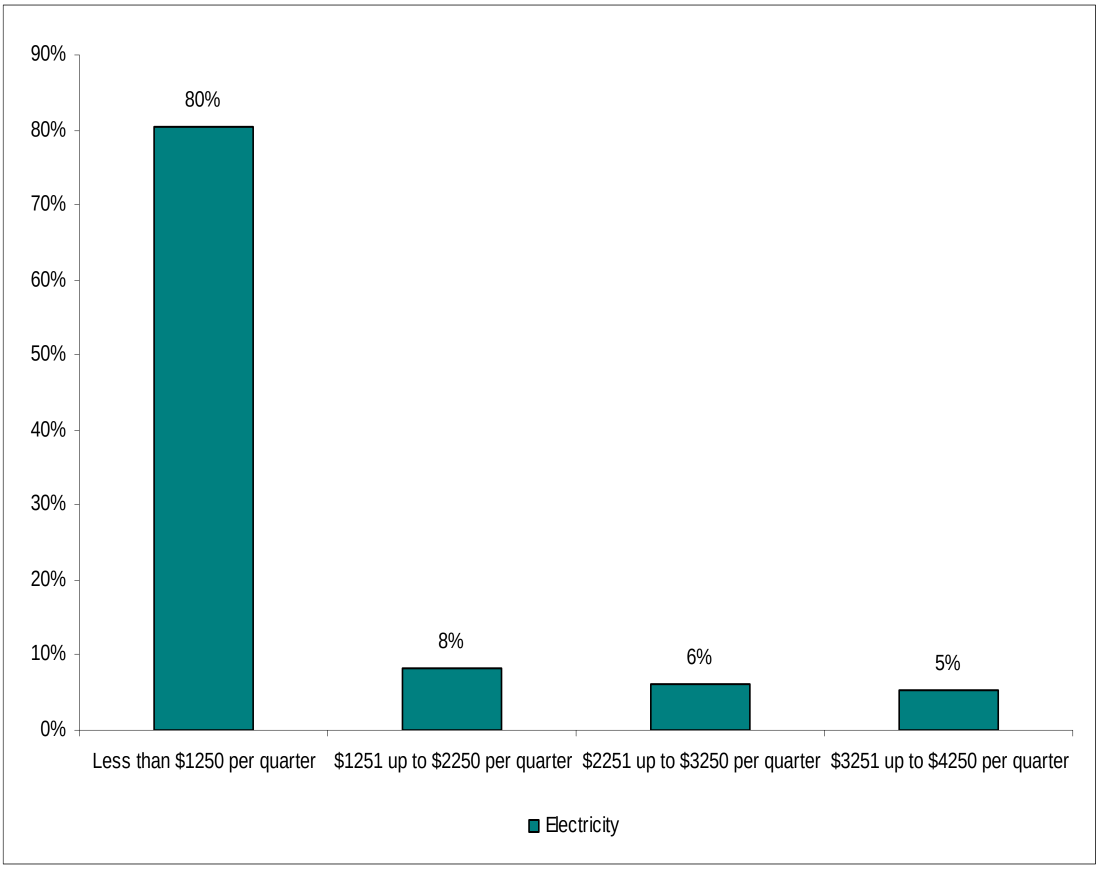
Figure 55. Amount of Recent Electricity Bill



QE2.How much was your business's most recent electricity bill?

Base: Total electricity users (n=508)

Figure 56. Amount of Recent Gas Bill



QG2. How much was your business's most recent gas bill?

Base: Total gas users (n=97)

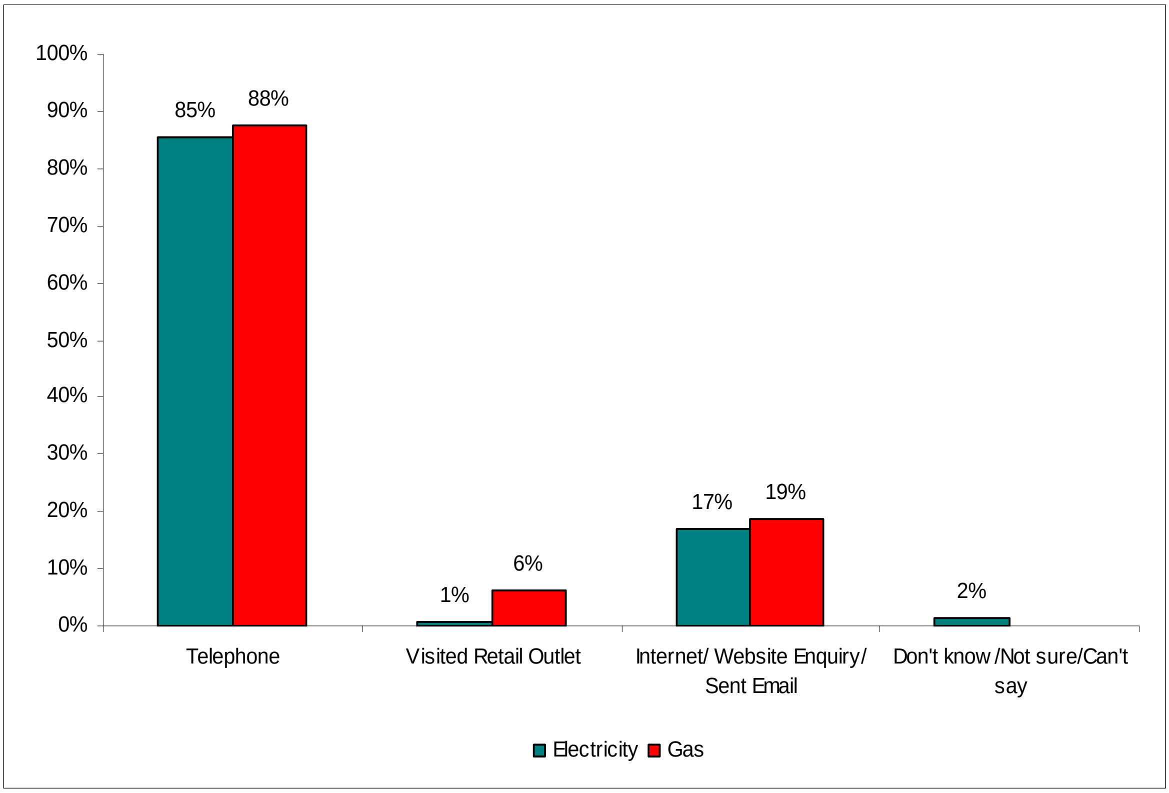
7. DATA WEIGHTING

The business survey data was weighted by the Data Analytics Dept. of Roy Morgan Research. The weighting factor was state region. Any departures from the regional sampling targets (see Table 1) in the final sample were adjusted by weighting to reflect those target percentages. Bases listed under each Figure show the unweighted counts.

8. EXPANDED/ADDITIONAL DATA CHARTS

As mentioned in the report, some data charts were edited due to space considerations. Answers given by smaller percentages of respondents were deleted; in some cases, results were conveyed in text rather than visually. This section shows expanded figures or those that were only described in text.

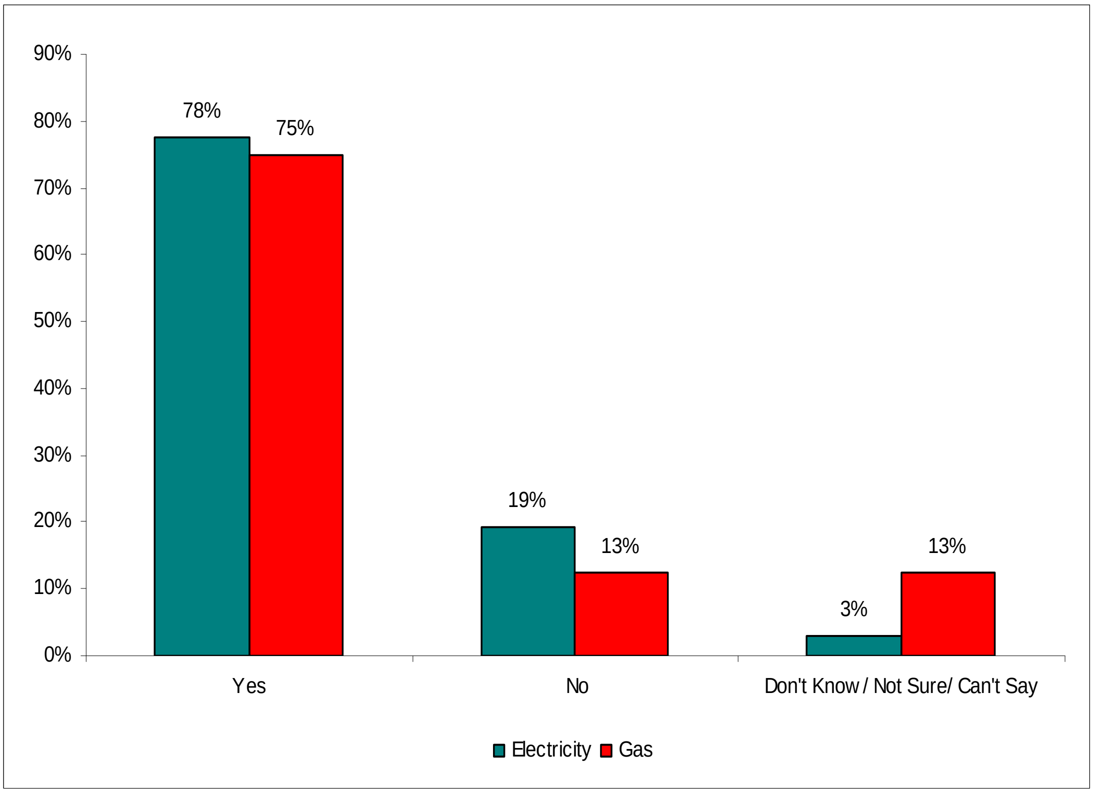
Method of Business Contacting Energy Company (mentioned in text, page 20)



QE11/QG11.Thinking about the last energy comp. that your business approached, how did you do this?

Base: Total approached electricity companies (n=137); total approached gas companies (n=16)

Smoothness of Switching Process (mentioned in text page 28)



QE18/QG18. Did the switching process go as smoothly as expected?

Base: Total switched electricity companies (n=228); total switched gas companies (n=24)

9. SURVEY

Thank you for agreeing to take part in this survey. Most people take about 15 minutes to complete it. Your answers will be used for research purposes only and are kept strictly confidential.

We are interested in your attitudes toward the utility services and types of energy you use in your business or at your place of employment. The survey is being conducted on behalf of the Australian Energy Market Commission. We assure you that no sales calls will eventuate from this survey.

Click NEXT to begin the survey.

qs0 Thinking about your business or your role as an employee, are you a person at your place of employment who is the decision maker or shares in the decision making about the purchase of utility services (electricity or gas)?

- ❍ Yes
- ❍ No
- ❍ Don’t Know/ Not Sure/ Can’t Say (98)

> **Screened** –
>
> *Thank you for your time and assistance, but unfortunately you do not qualify for the survey this time around.*
>
> *This market research is carried out in compliance with the Privacy Act, and the information you provided will be used only for research purposes.*
>
> *If you would like any more information about this project or Roy Morgan Research, you can phone us on 1800 337 332*

qs1 Please indicate what type of business you are in

- ❍ Retail (1)
- ❍ Manufacturing (2)
- ❍ Wholesale (3)
- ❍ Finance (4)
- ❍ Hospitality (accommodation, pubs, cafes & restaurants) (5)
- ❍ Transport (6)
- ❍ Communications/IT (7)
- ❍ Other(please specify) (97)____________
- ❍ None of these (98)
- ❍ Prefer not to answer (99)

qx8 Please indicate the NSW postcode of your business's location. If your business has more than one postcode in NSW, enter the one you are most familiar with.

THE POSTCODE IS IMPORTANT TO OUR SURVEY AS ENERGY PRICES AND PRODUCTS MAY VARY BETWEEN LOCATIONS/NETWORKS AND WE WOULD LIKE TO UNDERSTAND THE EXPERIENCE OF BUSINESS'S IN DIFFERENT LOCATIONS/NETWORKS.

area - quota

❍ Central Coast (1)
❍ Central West (2)
❍ Eastern/Inner (3)
❍ Far west (4)
❍ Hunter (5)
❍ Illawara (6)
❍ Mid North Coast (7)
❍ Murray/Lower Darling (8)
❍ New England North West (9)
❍ Northern (10)
❍ Northern Beaches (11)
❍ Northern Rivers (12)
❍ Orana (13)
❍ Riverina (14)
❍ South East NSW (15)
❍ South Western (16)
❍ Southern (17)
❍ Western (18)

qs2 What types of energy does your business use?

❑ Electricity (1)
❑ Piped Natural Gas (i.e. mains gas) (2)
❑ Bottled Gas (3)
❑ Solar (4)
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)
❍ Prefer not to say (99)

qs2a Are you able to connect to piped natural gas at your current business?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qe2 How much was your business's most recent electricity bill?

Provide your best estimation of the cost.

❍ Less than $2500 per quarter
❍ $2501 up to $5000 per quarter
❍ $5001 up to $7500 per quarter
❍ $7501 up to $10000 per quarter
❍ More than $10000 per quarter
❍ Don't Know/ Not Sure/ Can't Say (98)
❍ Prefer not to say (99)

qg2

How much was your business's most recent gas bill?

Provide your best estimation

- ❍ Less than $1250 per quarter
- ❍ $1251 up to $2250 per quarter
- ❍ $2251 up to $3250 per quarter
- ❍ $3251 up to $4250 per quarter
- ❍ More than $4250 per quarter
- ❍ Don't Know/ Not Sure/ Can't Say (98)
- ❍ Prefer not to say (99)

qe4 As far as you are aware, which of the following applies to your business?

- ❍ My business can choose the company it purchases electricity from (1)
- ❍ My business cannot choose the company it purchases electricity from (2)
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe5 Which company does your business buy electricity from in New South Wales?

Some electricity bills list the name of more than company. If this is true for your business, just select one of the companies.

- ❍ ActewAGL
- ❍ AGL
- ❍ Aurora
- ❍ Australian Power and Gas (APG)
- ❍ Country Energy
- ❍ Diamond Energy
- ❍ Dodo Power and Gas
- ❍ Energy Australia
- ❍ Integral Energy
- ❍ Lumo Energy
- ❍ Momentum Energy
- ❍ Origin Energy
- ❍ Powerdirect
- ❍ Red Energy
- ❍ Sanctuary Energy
- ❍ Simply Energy
- ❍ TRUenergy
- ❍ Other (please specify) (97)____________
- ❍ My business does not buy energy from an energy company (98)
- ❍ Don't Know/ Not Sure/ Can't Say (99)

qe5a

Which other companies do you think your business could buy electricity from in New South Wales?

- ❑ ActewAGL
- ❑ AGL
- ❑ Aurora
- ❑ Australian Power and Gas (APG)
- ❑ Country Energy
- ❑ Diamond Energy
- ❑ Dodo Power and Gas
- ❑ Energy Australia
- ❑ Integral Energy
- ❑ Lumo Energy
- ❑ Momentum Energy
- ❑ Origin Energy
- ❑ Powerdirect
- ❑ Red Energy
- ❑ Sanctuary Energy
- ❑ Simply Energy
- ❑ TRUenergy
- ❑ Other (please specify) (97)____________
- ❍ My business does not buy energy from an energy company (98)
- ❍ Don’t Know/ Not Sure/ Can’t Say (99)

qg5 Which company does your business buy gas from in New South Wales?

Some gas bills list the name of more than company. If this is true for your business, just select one of the companies.

- ❍ ActewAGL
- ❍ AGL
- ❍ Energy Australia
- ❍ Country Energy
- ❍ Origin Energy
- ❍ Simply Energy
- ❍ TRUenergy
- ❍ Other (please specify) (97)____________
- ❍ My business does not buy energy from an energy company (98)
- ❍ Don’t Know/ Not Sure/ Can’t Say (99)

qg5a Which other companies do you think your business could buy gas from in New South Wales?

- ❑ ActewAGL
- ❑ AGL
- ❑ Energy Australia
- ❑ Country Energy
- ❑ Origin Energy
- ❑ Simply Energy
- ❑ TRUenergy
- ❑ Other (please specify) (97)____________
- ❍ My business does not buy energy from an energy company (98)
- ❍ Don’t Know/ Not Sure/ Can’t Say (99)

qe6 Have any electricity companies approached your business by any means and offered to sell electricity?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe6a How many times have you or others in your business been approached in the past 12 months by electricity companies offering to sell electricity?

Enter 101 for "Not Sure/Can't Say"

qe7 Thinking about the last electricity company that contacted your business, how did they approach you?

- ❑ Door to door sales consultant
- ❑ Direct mail
- ❑ Telephone sales consultant
- ❑ Email
- ❑ Social media (e.g. Facebook offer/invitation, or Twitter offer/comment)
- ❑ Other (please specify) (97)_____________
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe8 Think about the information given to your business by an electricity company. For each row, indicate how much you agree or disagree with the statements.

	Agree Strongly	Agree Somewhat	Neither Agree nor Disagree	Disagree Somewhat	Disagree Strongly	Don't Know/ Not Sure/ Can't Say
The information was easy to understand	❍	❍	❍	❍	❍	❍
The information made it easy to compare offers between different retailers	❍	❍	❍	❍	❍	❍
There was sufficient information for my business to make an informed choice about whether the offer met its needs	❍	❍	❍	❍	❍	❍
The information helped my business to identify its energy needs	❍	❍	❍	❍	❍	❍

qg6 Have any gas companies approached your business by any means and offered to sell gas?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg6a

How many times have you or others in your business been approached in the past 12 months by gas companies offering to sell gas?

Enter 101 for "Not Sure/Can't Say"

qg7 Thinking about the last gas company that contacted your business, how did they approach you?

- ❑ Door to door sales consultant
- ❑ Direct mail
- ❑ Telephone sales consultant
- ❑ Email
- ❑ Social media (e.g. Facebook offer/invitation, or Twitter offer/comment)
- ❑ Other (please specify) (97)____________
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg8 Think about the information given to your business by a gas company. For each row, indicate how much you agree or disagree with the statements.

	Agree Strongly	Agree Somewhat	Neither Agree nor Disagree	Disagree Somewhat	Disagree Strongly	Don't Know/ Not Sure/ Can't Say
The information was easy to understand	❍	❍	❍	❍	❍	❍
The information made it easy to compare offers between different retailers	❍	❍	❍	❍	❍	❍
There was sufficient information for my business to make an informed choice about whether the offer met its needs	❍	❍	❍	❍	❍	❍
The information helped my business to identify its energy needs	❍	❍	❍	❍	❍	❍

qe9 Has your business approached an electricity company, including the existing electricity company, to ask about buying electricity from them?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe10 Why did your business approach the electricity company to ask about buying electricity from them?

❑ Planning to move the location of the business (1)
❑ Interested in comparing rates/offers/deals (2)
❑ Interested in negotiating a better energy deal compared to our existing deal (3)
❑ My business was interested in finding out about a ‘smart’ meter or ‘time of use’ meter (4)
❑ Other (please specify) (97)____________
❍ Don’t Know/ Not Sure/ Can’t Say (98)

qe11 Thinking about the last electricity company that your business approached, how did you do this?

❑ Telephone (1)
❑ Visited a retail outlet (2)
❑ Internet/ website enquiry / sent an email (3)
❑ Social media (e.g. Facebook, Twitter) (4)
❑ Other (please specify) (97)____________
❍ Don’t Know/ Not Sure/ Can’t Say (98)

qe12 Did any of the electricity companies that your business approached, or that approached your business...

❑ Refuse to sell your business electricity
❑ Offer to sell your business electricity
❑ Offer to sell your business electricity and gas as a combined offer
❍ Don’t Know/ Not Sure/ Can’t Say

qe12a Why did the company refuse to sell your business electricity?

❑ (97)____________
❍ Don’t Know/ Not Sure/ Can’t Say (98)

qe13 Has your business approached any electricity company, including the existing electricity company, to ask about buying gas from them?

❍ Yes
❍ No
❍ Don’t Know/ Not Sure/ Can’t Say (98)

qg9 Has your business approached any gas company including the existing gas company, to ask about buying gas from them?

❍ Yes
❍ No
❍ Don’t Know/ Not Sure/ Can’t Say (98)

qg10 Why did your business approach the gas company (to ask about buying gas from them)?

❑ Planning to move location of the business (1)
❑ Was interested in comparing rates/offers/deals (2)
❑ Was interested in negotiating a better energy deal compared to our existing deal (3)
❑ My business was interested in finding out about a ‘smart’ or ‘time of use’ meter (4)
❑ Other (please specify) (97)____________
❍ Don’t Know/ Not Sure/ Can’t Say (98)

qg11 Thinking about the last gas company that your business approached, how did you do this?

- ❑ Telephone (1)
- ❑ Visited a retail outlet (2)
- ❑ Internet/ website enquiry / sent an email (3)
- ❑ Social media (e.g. Facebook, Twitter) (4)
- ❑ Other (please specify) (97)____________
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg12 Did any of the gas companies that your business approached, or that approached your business...

- ❑ Refuse to sell your business gas
- ❑ Offer to sell your business gas
- ❑ Offer to sell your business electricity and gas as a combined offer
- ❍ Don't Know/ Not Sure/ Can't Say

qg12a Why did the company refuse to sell your business gas?

- ❑ (97)____________
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg13 Has your business approached any gas company including the existing gas company, to ask about buying electricity from them?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe14 Has your business switched electricity companies in New South Wales since January 2002?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe14a How many times has your business switched electricity companies in New South Wales since January 2002?

- ❍ One
- ❍ Two
- ❍ Three
- ❍ Four
- ❍ Five
- ❍ More than five times
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe15 The last time your business switched its electricity company, how easy was the switching process?

- ❍ Very easy (1)
- ❍ Somewhat easy (2)
- ❍ Neither easy nor difficult (3)
- ❍ Somewhat difficult (4)
- ❍ Very difficult (5)
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe16 Would you say the switching process for your business...?

- Took more time than expected
- Took less time than expected
- Took about as long as expected
- Don't Know/ Not Sure/ Can't Say (98)

qe18 Did the switching process go as smoothly as expected?

- Yes
- No
- Don't Know/ Not Sure/ Can't Say (98)

qe19 Why did the switching process not go smoothly?

- (97)____________
- Don't Know/ Not Sure/ Can't Say (98)

qe20 The last time your business switched its electricity company, what was the one most important reason for the decision?

- The business was offered a monetary rebate / monetary credit/ financial incentive to switch
- The business wanted to be with the same company for electricity and gas
- The business wanted to take advantage of service bundling (for example, getting electricity and TV services from the same company)
- The business was unhappy with the former electricity company
- The business wanted to get the salesperson to leave our business alone
- The business was offered a green energy product
- The business was offered a better rate on the electricity / a better plan / can now pay less for electricity
- The business was offered a free gift (or prize or subscription)
- The business trusted them more
- The business was moving locations
- Other (please specify) (97)____________
- Don't Know/ Not Sure/ Can't Say (98)

qe22 Overall, how satisfied or dissatisfied are you with your business's new electricity company?

- Very satisfied (1)
- Somewhat satisfied (2)
- Neither satisfied nor dissatisfied (3)
- Somewhat dissatisfied (4)
- Very dissatisfied (5)
- Don't Know/ Not Sure/ Can't Say (98)

qe23 Why are you dissatisfied with your business's new electricity company?

- (97)____________
- Don't Know/ Not Sure/ Can't Say (98)

qe24 Why are you satisfied with your business's new electricity company?

- (97)____________
- Don't Know/ Not Sure/ Can't Say (98)

qe25 Why hasnʹt your business changed electricity companies?

❑ Concern with the switching process
❑ Could not be bothered / too much effort
❑ The information is too complex/there's too much to sort through/ too much to figure out/too technical
❑ Happy with current electricity company
❑ Higher costs with other electricity companies
❑ Inadequate potential savings
❑ Insufficient information / not enough information
❑ My business didn't know where to look
❑ My business didn't know how to switch
❑ Couldn't understand the information/ information is vague/ ambiguous/ poorly written/poorly organised
❑ Lack of confidence in the new electricity company
❑ Waiting for better offer / waiting for more convincing offer
❑ Didn't know the business could switch
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qe26 Have you changed anything about the way your current electricity company sells electricity to the business?

THAT IS, HAS YOUR BUSINESS AGREED TO PAY DIFFERENT RATES, BUY A DIFFERENT TYPE OF ELECTRICITY PRODUCT (SUCH AS GREEN ENERGY), BEEN GIVEN A GIFT OR INCENTIVE TO AGREE TO A DIFFERENT TYPE OF SUPPLY ARRANGEMENT/ CONTRACT?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qe27 Thinking about the last time your business changed electricity supply arrangements with its electricity company, what was the one main reason for the decision?

❍ The business was offered a monetary incentive / monetary credit/ financial incentive to switch
❍ The business wanted to be with the same company for electricity and gas
❍ The business wanted to take advantage of service bundling (for example, getting electricity and TV services from the same company)
❍ The business was unhappy with our former electricity company
❍ The business wanted to get the salesperson to leave us alone
❍ The business was offered a green energy product
❍ The business was offered a better rate on the electricity / a better plan
❍ The business was offered a free gift (or prize or subscription)
❍ The business trusted them more
❍ The business had to change (e.g. a new energy meter was being installed)
❍ My business was moving locations
❍ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qe29 How satisfied or dissatisfied are you with your business's new electricity supply arrangements?

❍ Very satisfied (1)
❍ Somewhat satisfied (2)
❍ Neither satisfied nor dissatisfied (3)
❍ Somewhat dissatisfied (4)
❍ Very dissatisfied (5)
❍ Don't Know/ Not Sure/ Can't Say (98)

qe30 Why was your business dissatisfied?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qe31 Why was your business satisfied?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qe32 In the time since your business last changed electricity supply arrangements with the retailer, have you checked whether your current energy price (or tariff) is competitive relative to other energy offers?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qe33 Was your business's current energy price (or tariff) competitive relative to other energy offers?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qe34 Why haven't you made any changes to the way your business buys electricity?

- ❑ Concern with the switching process
- ❑ Could not be bothered / too much effort
- ❑ The information is too complex/there's too much to sort through/ too much to figure out/too technical
- ❑ Happy with current electricity company
- ❑ Higher costs with other electricity companies
- ❑ Inadequate potential savings
- ❑ Insufficient information / not enough information
- ❑ My business didn't know where to look
- ❑ My business didn't know how to switch
- ❑ Couldn't understand the information/ information is vague/ ambiguous/ poorly written/poorly organised
- ❑ Lack of confidence in the new electricity company
- ❑ Waiting for better offers
- ❑ Didn't know my business could switch
- ❑ My business didn't want to be locked into an energy contract
- ❑ Other (please specify) (97)____________
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qe35 Which of the following would be the one most effective incentive to encourage your business to change electricity companies or change the way your business buys electricity?

- ❍ Lower prices (1)
- ❍ Free gifts (2)
- ❍ Green energy (3)
- ❍ Having electricity and gas with one company (4)
- ❍ Early payment bonuses (5)
- ❍ Improved customer service (6)
- ❍ Nothing would be an effective incentive (7)
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg14 Has your business switched gas companies in New South Wales since January 2002?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg14a How many times has your business switched gas companies in New South Wales since January 2002?

- ❍ One
- ❍ Two
- ❍ Three
- ❍ Four
- ❍ Five
- ❍ More than five times
- ❍ Don't Know/ Not Sure/ Can't Say (98)

qg15 The last time your business switched gas companies, how easy was the switching process?

❍ Very easy (1)
❍ Somewhat easy (2)
❍ Neither easy nor difficult (3)
❍ Somewhat difficult (4)
❍ Very difficult (5)
❍ Don't Know/ Not Sure/ Can't Say (98)

qg16 Would you say the switching process for your business...?

❍ Took more time than expected
❍ Took less time than expected
❍ Took about as long as expected
❍ Don't Know/ Not Sure/ Can't Say (98)

qg18 Did the switching process go as smoothly as expected?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qg19 Why did the switching process not go smoothly?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg20 The last time your business switched gas companies, what was the one most important reason for decision?

❍ The business was offered a monetary rebate / monetary credit/ financial incentive to switch
❍ The business wanted to be with the same company for electricity and gas
❍ The business wanted to take advantage of service bundling (for example, getting gas and TV services from the same company)
❍ The business was unhappy with the former gas company
❍ The business wanted to get the salesperson to leave us alone
❍ The business was offered a green energy product
❍ The business was offered a better rate on the gas / a better plan / can now pay less for gas
❍ The business was offered a free gift (or prize or subscription)
❍ The business trusted them more
❍ The business was moving locations
❍ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg22 Overall, how satisfied or dissatisfied are you with the business's new gas company?

❍ Very satisfied (1)
❍ Somewhat satisfied (2)
❍ Neither satisfied nor dissatisfied (3)
❍ Somewhat dissatisfied (4)
❍ Very dissatisfied (5)
❍ Don't Know/ Not Sure/ Can't Say (98)

qg23 Why are you dissatisfied with your business's new gas company?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg24 Why are you satisfied with your business's new gas company?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg25 Why hasn't your business changed gas companies?

❑ Concern with the switching process
❑ Could not be bothered / too much effort
❑ The information is too complex/there's too much to sort through/ too much to figure out/too technical
❑ Happy with current gas company
❑ Higher costs with other gas companies
❑ Inadequate potential savings
❑ Insufficient information / not enough information
❑ The business didn't know where to look
❑ The business didn't know how to switch
❑ Couldn't understand the information/ information is vague/ ambiguous/ poorly written/poorly organised
❑ Lack of confidence in the new gas company
❑ Waiting for better offer / waiting for more convincing offer
❑ Didn't know the business could switch
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg26 Have you changed anything about the way your current gas company sells gas to the business?

THAT IS, HAS YOUR BUSINESS AGREED TO PAY DIFFERENT RATES, BEEN GIVEN A GIFT OR INCENTIVE TO AGREE TO A DIFFERENT TYPE OF SUPPLY ARRANGEMENT/ CONTRACT.

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qg27 Thinking about the last time your business changed gas supply arrangements with the gas company, what was the one main reason for the decision?

❍ The business was offered a monetary incentive / monetary credit/ financial incentive to switch
❍ The business wanted to be with the same company for electricity and gas
❍ The business wanted to take advantage of service bundling (for example, getting gas and TV services from the same company)
❍ The business was unhappy with the former gas company
❍ The business wanted to get the salesperson to leave us alone
❍ The business was offered a green energy product
❍ The business was offered a better rate on the gas / a better plan
❍ The business was offered a free gift (or prize or subscription)
❍ The business trusted them more
❍ The business had to change (e.g. a new energy meter was being installed)
❍ My business was moving locations
❍ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg29 How satisfied or dissatisfied are you with your business's new gas supply arrangements?

❍ Very satisfied (1)
❍ Somewhat satisfied (2)
❍ Neither satisfied nor dissatisfied (3)
❍ Somewhat dissatisfied (4)
❍ Very dissatisfied (5)
❍ Don't Know/ Not Sure/ Can't Say (98)

qg30 Why was your business dissatisfied?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg31 Why was your business satisfied?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg32 In the time since your business last changed gas supply arrangements with the retailer, have you checked whether your business's current energy price (or tariff) is competitive relative to other energy offers?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qg33 Was your business's current energy price (or tariff) competitive relative to other energy offers?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qg34 Why haven't you made any changes to the way your business buys gas?

❑ Concern with the switching process
❑ Could not be bothered / too much effort
❑ The information is too complex/there's too much to sort through/ too much to figure out/too technical
❑ Happy with current gas company
❑ Higher costs with other gas companies
❑ Inadequate potential savings
❑ Insufficient information / not enough information
❑ My business didn't know where to look
❑ My business didn't know how to switch
❑ Couldn't understand the information/ information is vague/ ambiguous/ poorly written/poorly organised
❑ Lack of confidence in the new gas company
❑ Waiting for better offers
❑ Didn't know my business could switch
❑ My business didn't want to be locked into an energy contract
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg35 Which of following would be the one most effective incentive to encourage your business to change gas companies or change the way your business buys gas?

❍ Lower prices (1)
❍ Free gifts (2)
❍ Green energy (3)
❍ Having electricity and gas with one company (4)
❍ Early payment bonuses (5)
❍ Improved customer service (6)
❍ Nothing would be an effective incentive (7)
❍ Don't Know/ Not Sure/ Can't Say (98)

q36 Has your business, at any stage, entered into an energy contract and used the cooling off period to cancel the contract?

❍ Yes (1)
❍ No (2)
❍ Not heard of a cooling off period (3)
❍ Don't Know/ Not Sure/ Can't Say (98)

qe37 In the next 12 months, how likely or unlikely is it that you will change the business's electricity supply arrangements with the current electricity company?

❍ Very likely (1)
❍ Somewhat likely (2)
❍ Neither unlikely nor likely (3)
❍ Somewhat unlikely (4)
❍ Very unlikely (5)
❍ Don't Know/ Not Sure/ Can't Say (98)

qe38 Have you looked for any information in the last 12 months to assist you in making a decision about changing your business's electricity supply arrangements with an electricity supplier, whether the business has taken out a contract or not?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qe39 What were the sources of the information?

❑ Newspaper advertisements
❑ Radio ads
❑ Magazine ads
❑ Outdoor ads (bus shelters, billboards, etc.)
❑ IPART (Independent Regulatory and Pricing Tribunal NSW)
❑ Friends/family/work colleagues
❑ Internet searches (e.g. Google/Yahoo, energy company websites, ombudsman websites)
❑ Internet price comparators (e.g. MyEnergyOffers, EnergyMadeEasy)
❑ Internet ads (e.g. website banner advertisements / special offers)
❑ Newspapers
❑ Radio
❑ Representative of the electricity company
❑ The electricity company
❑ Television
❑ Social media (e.g. Facebook, Twitter)
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qe40 Think about the information your business obtained. For each row, indicate how much you agree or disagree with the statements

	Agree Strongly (1)	Agree Somewhat (2)	Neither Agree nor Disagree (3)	Disagree Somewhat (4)	Disagree Strongly (5)	Don't Know Not Sure Can't Say (6)
The information was easy to obtain (1)	❍	❍	❍	❍	❍	❍
The information was easy to understand (2)	❍	❍	❍	❍	❍	❍
The information made it easy to compare offers (3)	❍	❍	❍	❍	❍	❍
There was sufficient information for the business to make an informed choice about whether the offer met its needs (4)	❍	❍	❍	❍	❍	❍

qg37 In the next 12 months, how likely or unlikely is it that you will change the business's gas supply arrangements with the current gas company?

❍ Very likely (1)
❍ Somewhat likely (2)
❍ Neither unlikely nor likely (3)
❍ Somewhat unlikely (4)
❍ Very unlikely (5)
❍ Don't know/not sure/can't say (98)

qg38 Have you looked for any information in the last 12 months to assist you in making a decision about changing your business's gas supply arrangements with a gas supplier, whether the business has taken out a contract or not?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qg39 What were the sources of the information?

❑ Newspaper advertisements
❑ Radio ads
❑ Magazine ads
❑ Outdoor ads (bus shelters, billboards, etc.)
❑ IPART (Independent Regulatory and Pricing Tribunal NSW)
❑ Friends/family/work colleagues
❑ Internet searches (e.g. Google/Yahoo, energy company websites, ombudsman websites)
❑ Internet price comparators (e.g. MyEnergyOffers, EnergyMadeEasy)
❑ Internet ads (e.g. website banner advertisements / special offers)
❑ Newspapers
❑ Radio
❑ Representative of the gas company
❑ The gas company
❑ Television
❑ Social media (e.g. Facebook, Twitter)
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qg40 Think about the information your business obtained. For each row, indicate how much you agree or disagree with the statements.

	Agree Strongly (1)	Agree Somewhat (2)	Neither Agree nor Disagree (3)	Disagree Somewhat (4)	Disagree Strongly (5)	Don't Know/ Not Sure/ Can't Say (6)
The information was easy to obtain (1)	❍	❍	❍	❍	❍	❍
The information was easy to understand (2)	❍	❍	❍	❍	❍	❍
The information made it easy to compare offers (3)	❍	❍	❍	❍	❍	❍
There was sufficient information for the business to make an informed choice about whether the offer met its needs (4)	❍	❍	❍	❍	❍	❍

qe42 Has your business experienced any of the following?

❑ The actual price your business was charged did not match the prices it was quoted by the electricity company (1)
❑ The business entered into a contract in order to get more information (2)
❑ The business felt pressured into signing a contract with an electricity company (3)
❑ The business was told things about the terms and conditions of the contract that did not prove to be true (4)
❑ The business was transferred to another electricity company without explicit consent (5)
❑ The business was unable to terminate its electricity contract during the cooling off period (6)
❑ The business entered into a contract simply to get the person to leave the business and/ or hang up the phone (7)
❍ None of these (8)

q43 Has your business ever made a complaint about an electricity or gas company?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

q44 Who did your business complain to?

❑ EWON / OMBUDSMAN (Energy and Water Ombudsman NSW)
❑ IPART (Independent Pricing and Regulatory Tribunal NSW)
❑ AER (Australian Energy Regulator)
❑ AEMO (Australian Energy Market Operator)
❑ AEMC (Australian Energy Market Commission)
❑ ACCC (Australian Competition and Consumer Commission)
❑ DTIRIS (NSW Department of Trade & Investment, Regional Infrastructure & Services / NSW Energy Minister's Department)
❑ LOCAL MP / MINISTER FOR ENERGY
❑ NSW FAIR TRADING
❑ THE ENERGY (ELECTRICITY or GAS) COMPANY
❑ MEDIA (e.g. television, radio, newspaper)
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

q45 If your business ever did need to complain about an electricity or gas company, who would you go to?

❑ EWON / OMBUDSMAN (Energy and Water Ombudsman NSW)
❑ IPART (Independent Pricing and Regulatory Tribunal NSW)
❑ AER (Australian Energy Regulator)
❑ AEMO (Australian Energy Market Operator)
❑ AEMC (Australian Energy Market Commission)
❑ ACCC (Australian Competition and Consumer Commission)
❑ DTIRIS (NSW Department of Trade & Investment, Regional Infrastructure & Services / NSW Energy Minister's Department)
❑ LOCAL MP / MINISTER FOR ENERGY
❑ NSW FAIR TRADING
❑ THE ENERGY (ELECTRICITY or GAS) COMPANY
❑ MEDIA (e.g. television, radio, newspaper)
❑ Other (please specify) (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

qe46 Would you say your business has...

❍ a greater variety of offers available from electricity companies compared to a year ago (1)
❍ a smaller variety of offers available from electricity companies compared to a year ago (2)
❍ the same variety of offers available from electricity companies compared to a year ago (3)
❍ Don't know/not sure/can't say (98)

qe47 Have you contacted your business's electricity company in the past 12 months?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qe48 When your business contacted the electricity company in the past 12 months, how satisfied were you with the following? For each row, indicate how satisfied or dissatisfied you are with the statements.

	Very satisfied (1)	Somewhat satisfied (2)	Neither satisfied nor dissatisfied (3)	Somewhat dissatisfied (4)	Very dissatisfied (5)	Don't Know/ Not Sure/ Can't Say (98)
The timeliness of the response (1)	❍	❍	❍	❍	❍	❍
The assistance provided (2)	❍	❍	❍	❍	❍	❍

qe49 For each row, indicate how much you agree or disagree with the statements

Note: A feed-in tariff is the premium paid by an energy company to its consumers for any excess electricity generated by their solar, wind, or alternative energy system. feed-in tariffs are used by governments as an incentive for consumers to adopt newer, cleaner, renewable energy sources.

	Agree Strongly	Agree Somewhat	Neither Agree nor Disagree	Disagree Somewhat	Disagree Strongly	Don't Know/ Not Sure/ Can't Say
My business would go to its electricity company for advice on purchasing a new energy appliance. (1)	❍	❍	❍	❍	❍	❍
My business would go to its electricity company for advice on improving its energy efficiency and decreasing its energy use. (2)	❍	❍	❍	❍	❍	❍
My business would go to its electricity company for advice on feed-in tariffs. (3)	❍	❍	❍	❍	❍	❍

qg42 Has your business experienced any of the following?

❑ The actual price your business was charged did not match the prices it was quoted by the gas company (1)
❑ Your business entered into a contract in order to get more information (2)
❑ Your business felt pressured into signing a contract with an gas company (3)
❑ Your business was told things about the terms and conditions of the contract that did not prove to be true (4)
❑ Your business was transferred to another gas company without its explicit consent (5)
❑ Your business was unable to terminate its gas contract during the cooling off period (6)
❑ Your business entered into a contract simply to get the person to leave the business and/ or hang up the phone (7)
❍ None of these (8)

qg46 Would you say your business has...

❍ a greater variety of offers available from gas companies compared to a year ago (1)
❍ a smaller variety of offers available from gas companies compared to a year ago (2)
❍ The same variety of offers available from gas companies compared to a year ago (3)
❍ Don't know/not sure/can't say (98)

qg47 Have you contacted your business's gas company in the past 12 months?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

qg48 When your business contacted its gas company in the past 12 months, how satisfied were you with the following? For each row, indicate how satisfied or dissatisfied you are with the statements.

	Very satisfied (1)	Somewhat satisfied (2)	Neither satisfied nor dissatisfied (3)	Somewhat dissatisfied (4)	Very dissatisfied (5)	Don't Know/ Not Sure/ Can't Say (98)
The timeliness of the response (1)	❍	❍	❍	❍	❍	❍
The assistance provided (2)	❍	❍	❍	❍	❍	❍

qg49 For each row, indicate how much you agree or disagree with the statements

	Agree Strongly	Agree Somewhat	Neither Agree nor Disagree	Disagree Somewhat	Disagree Strongly	Don't Know/ Not Sure/ Can't Say
My business would go to its gas company for advice on purchasing a new energy appliance. (1)	❍	❍	❍	❍	❍	❍
My business would go to its gas company for advice on improving its energy efficiency and decreasing its energy use. (2)	❍	❍	❍	❍	❍	❍

q49 In terms of the actual unit price (or tariff) at which your business consumes energy, do you know whether this price is a regulated price or a market price?

NOTE: A "REGULATED PRICE" PRICE MEANS THE PRICE THAT IS SET BY THE NSW REGULATOR, IPART.

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

q50 Have you made any attempt to reduce your business's energy consumption in the last 12 months?

❍ Yes
❍ No
❍ Don't Know/ Not Sure/ Can't Say (98)

q51 What was the main factor that influenced your decision to attempt to reduce your business's energy consumption in the last 12 months?

❑ (97)____________
❍ Don't Know/ Not Sure/ Can't Say (98)

q52 Is your business aware of 'time of use" pricing – that is, an electricity supply arrangement whereby the price charged by an electricity company varies throughout the day, with the price of electricity being highest in the peak period?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

q53 Does the electricity supply arrangement that your business currently has in place with its electricity company allow for 'time of use' pricing?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

q55 Is your business aware of the availability of any assistance to help in comparing energy prices between retailers and making energy decisions, such as price comparator websites or other energy brokers?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

q56 Is your business aware of the availability of the NSW price comparator website, MyEnergyOffers, which is independent, free and may help your business to compare energy prices between retailers?

- ❍ Yes
- ❍ No
- ❍ Don't Know/ Not Sure/ Can't Say (98)

Now, a few questions just for classification purposes.

qx5 Please indicate your age.

- ❍ 18 to 24 (1)
- ❍ 25 to 30 (2)
- ❍ 31 to 39 (3)
- ❍ 40 to 54 (4)
- ❍ 55 to 64 (5)
- ❍ 65+ (6)
- ❍ Prefer not to say (98)

qsex

PLEASE indicate your SEX

- ❍ Male (1)
- ❍ Female (2)
- ❍ Prefer not to say (98)

That's the final question. Thank you for your time and assistance. This market research is carried out in compliance with the Privacy Act, and the information you have provided will be used only for research purposes. We are conducting this survey on behalf of the Australian Energy Market Commission.

If you would like any more information about this project or Roy Morgan Research, you can phone us on 1800 337 332.

10. APPENDIX 1: RE-ASSIGNMENT OF REGIONS

See Section 5 for more information.

	TOTAL	METRO (excluding Hunter and Illawara)	METRO (including Hunter and Illawara)	EFFECT ON METRO	NON-METRO (including Hunter and Illawara)	NON-METRO (excluding Hunter and Illawara)	EFFECT ON NON METRO	EFFECT OF CHANGING DEFINITION OF METRO/ NON-METRO
Business electricity								
I can choose the company I purchase electricity from	92%	93%	93%	0%	91%	90%	-1%	metro vs. non-metro was not significantly different both ways
Was approached by an electricity company selling electricity	67%	67%	67%	0%	66%	65%	-1%	metro vs. non-metro was not significantly different both ways
Last approach was a Door To Door Sales Consultant	34%	38%	35%	-3%	25%	28%	3%	metro vs. non-metro significantly different in original but **not** significantly different when revised
Switched electricity company since 2002	45%	41%	43%	2%	52%	50%	-2%	metro vs. non-metro significantly different in original but not significantly different when revised
Changed arrangements with current provider	17%	17%	19%	2%	16%	9%	-7%	metro vs. non-metro **not** significantly different in original but significantly different when revised

	TOTAL	METRO (excluding Hunter and Illawara)*	METRO (including Hunter and Illawara)	EFFECT ON METRO	NON-METRO (including Hunter and Illawara)*	NON-METRO (excluding Hunter and Illawara)	EFFECT ON NON METRO	
Business gas								
I can choose the company I purchase gas from	91%	96%	93%	-3%	75%	80%	5%	metro vs. non-metro significantly different in original but not significantly different when revised
Was approached by an gas company selling gas	37%	42%	39%	-3%	21%	27%	6%	metro vs. non-metro significantly different in original but not significantly different when revised
Last approach was a Door To Door Sales Consultant	47%	48%	50%	2%	40%	25%	-15%	metro vs. non-metro was not significantly different both ways
Switched gas company since 2002	25%	27%	29%	2%	17%	0%	-17%	metro vs. non-metro was not significantly different both ways
Changed arrangements with current provider	14%	11%	10%	-1%	20%	27%	7%	metro vs. non-metro was not significantly different both ways