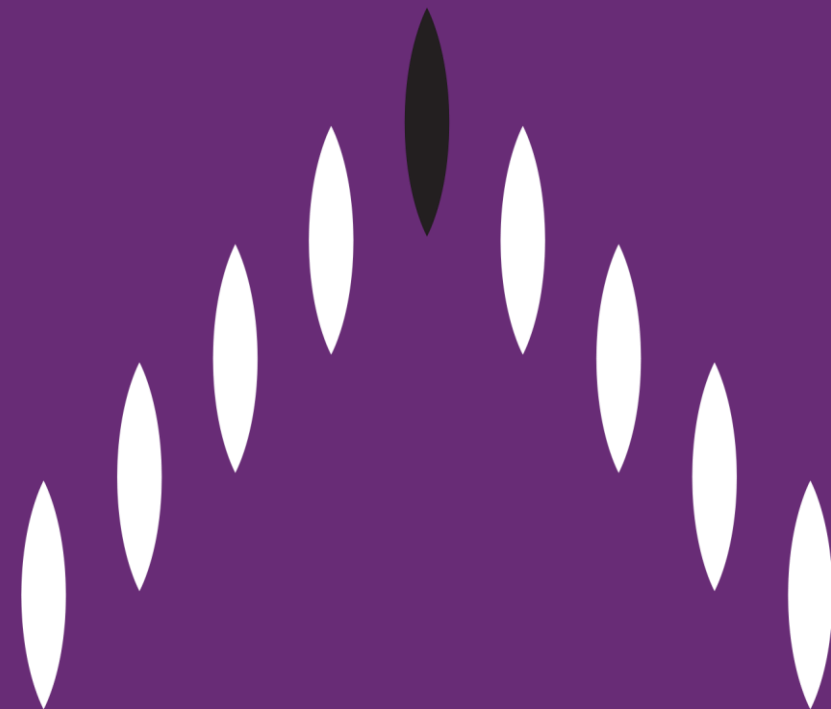


# ENERGY CONSUMER BEHAVIOUR SURVEY

Small Business Topline Results  
October 2021

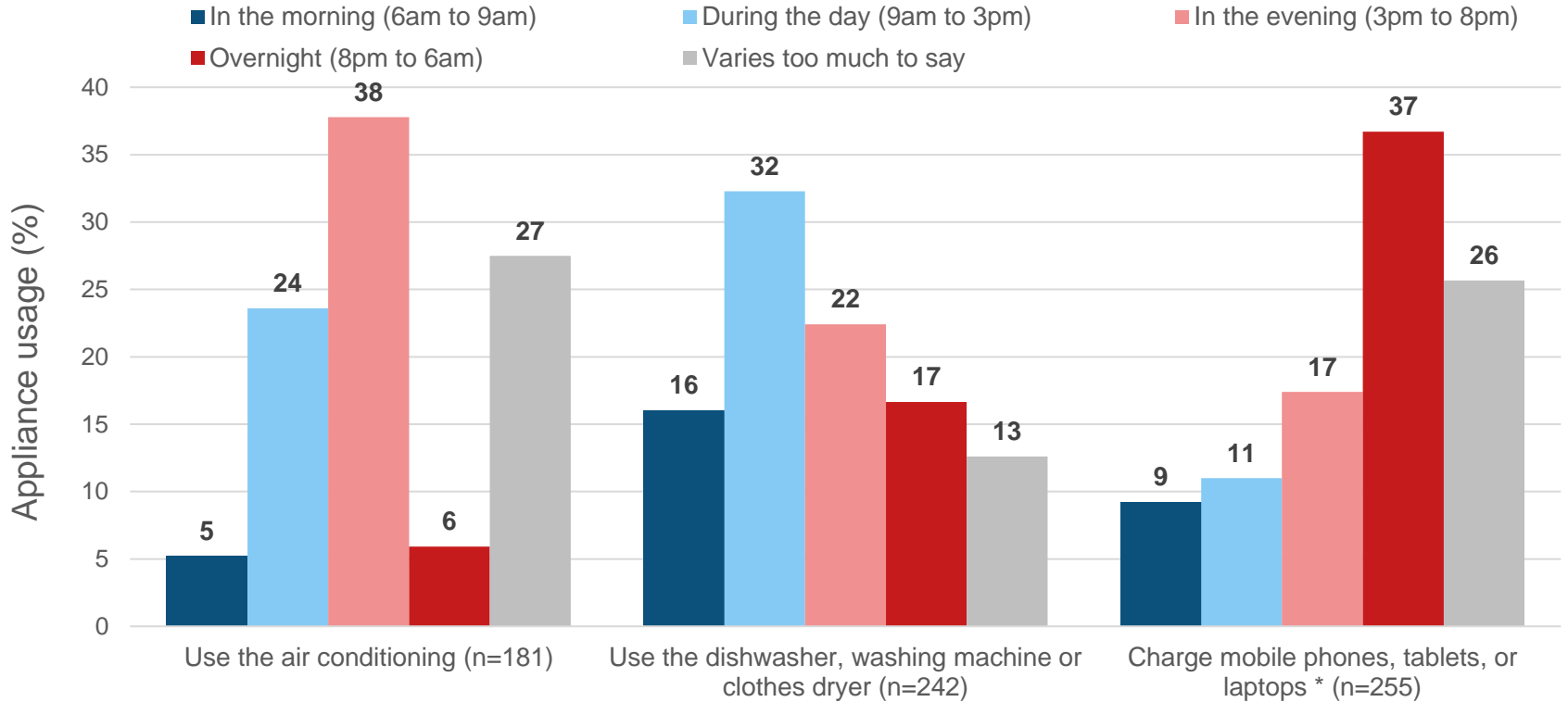


# Changing Behaviour

- 32% of businesses (home/mobile locations) use washing appliances during the day and 37% charge their electronic devices overnight.
- For those using these appliances during peak hours, the majority would find it easy to switch usage to off-peak hours.
- Home/mobile businesses are willing to reduce peak energy use, with around a third willing if offered a financial incentive, and a further half even if no incentive was offered.
- There is an appetite for smart devices, with 23% of home/mobile businesses who would definitely use smart appliances to reduce energy usage.

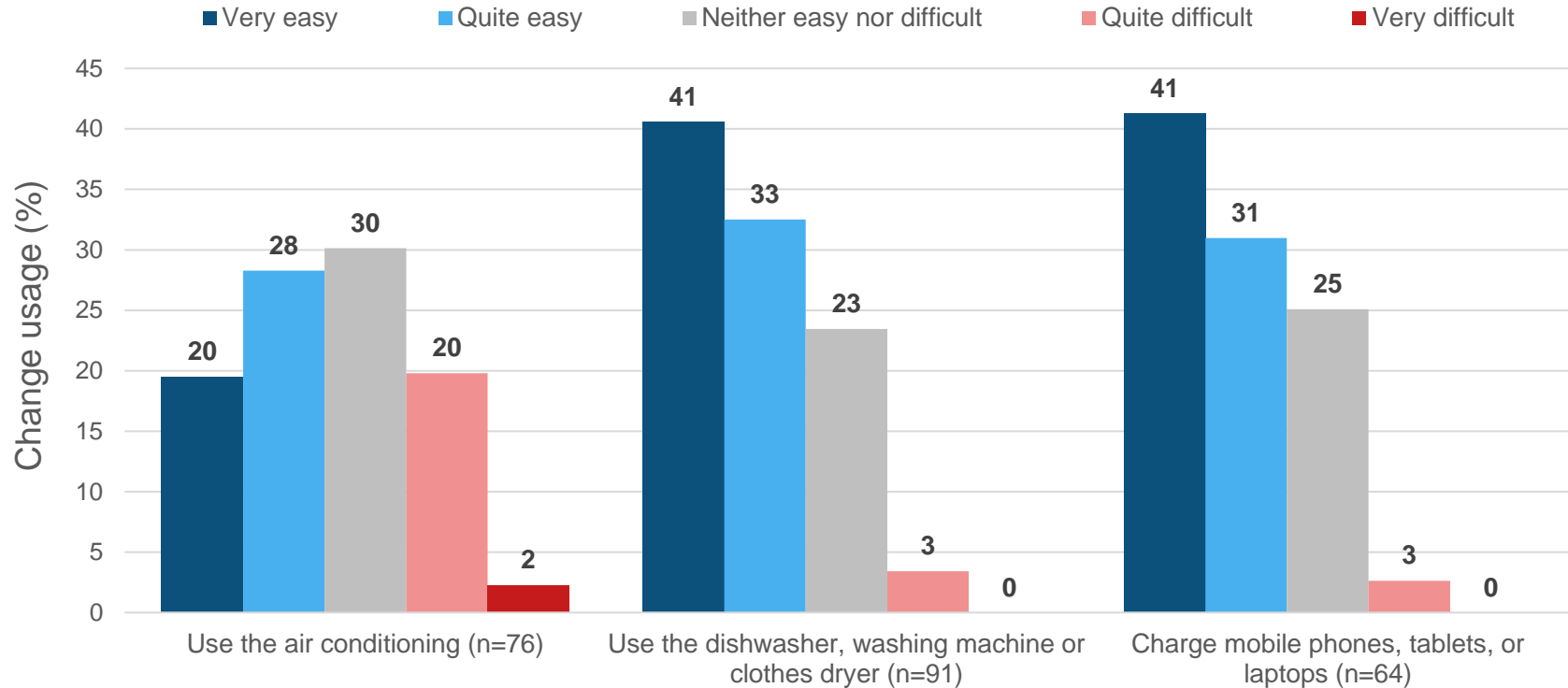


# Electrical appliance use



Q: Typically, at what time of the day does your household use the following appliances?  
 Base size: All businesses operating from home/mobile locations who have each appliance  
 Results suppressed for any product with sample size <50  
 \* Asked to all participants

# Difficulty to change electrical appliance use

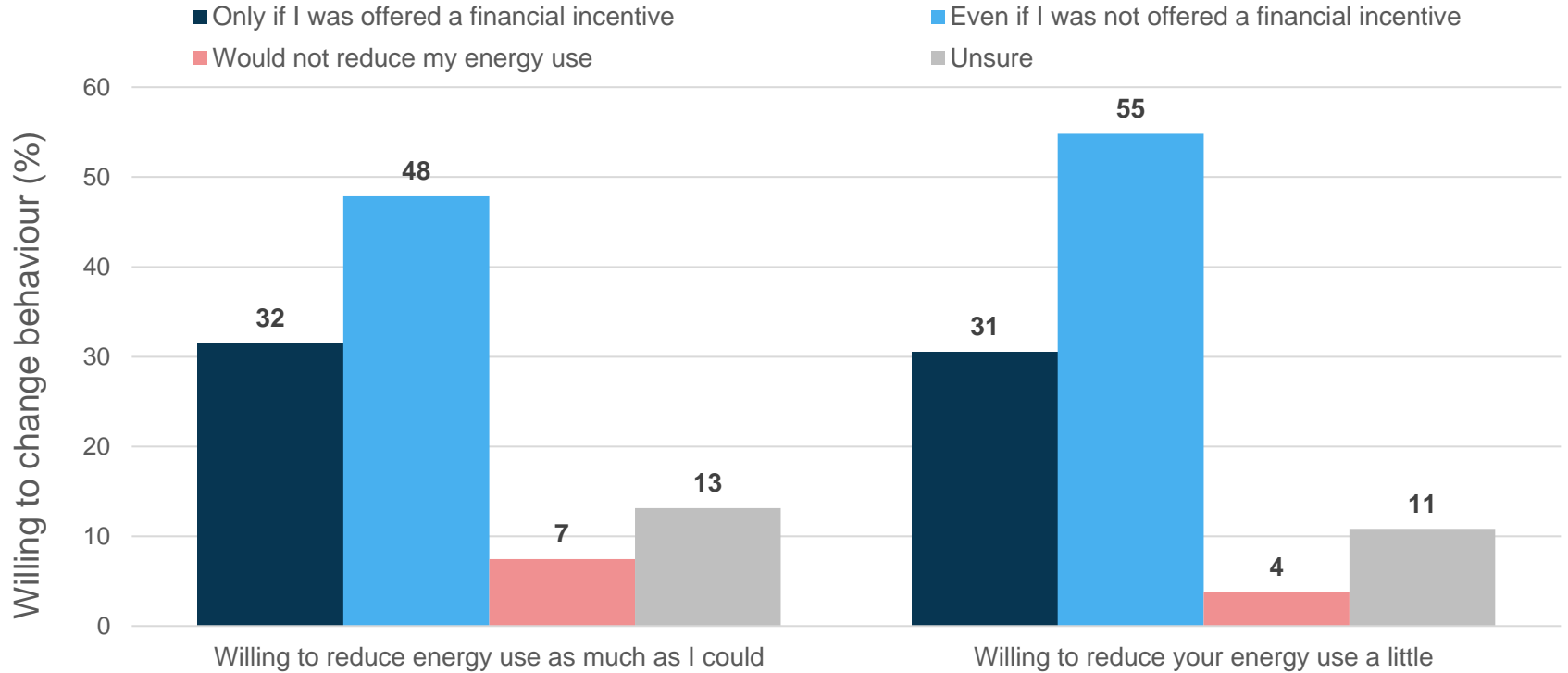


Q: How easy or difficult would it be for your household to change when you do these things to a time when there is less demand for energy (e.g. to the middle of the day or overnight)?

Base size: All businesses operating from home/mobile locations who have each appliance and use at peak times

Results suppressed for any product with sample size <50

# Willingness to change behaviour

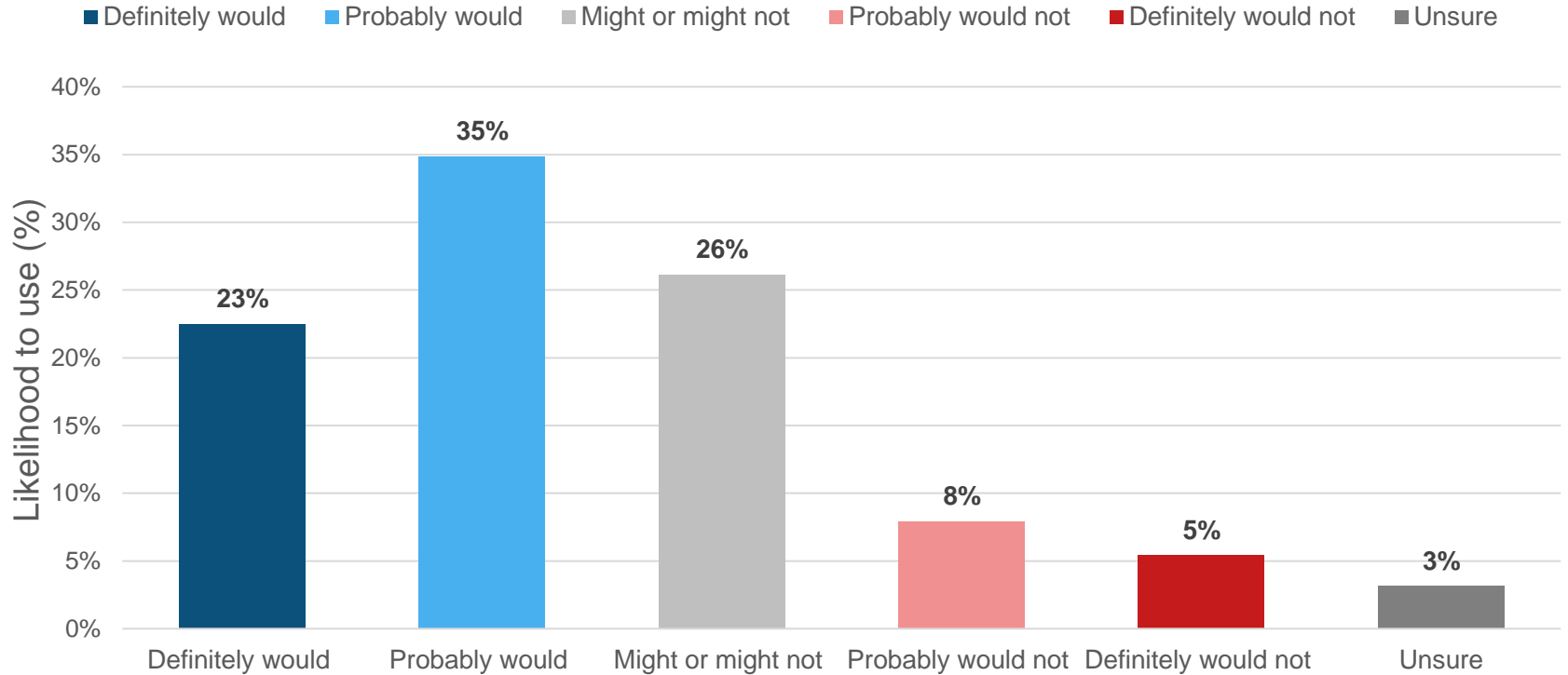


Q: If there was such a campaign asking that people reduce their energy use during a very hot period, would you be willing to reduce your energy use as much as you could for any of the reasons below?

Q: And would you be willing to reduce your energy use a little for any of the reasons below?

Base size: All businesses operating from home/mobile locations (n=255)

# Likelihood to use smart appliances



Q: In the next few years, smart appliances could become more available. These would help people reduce their energy bills by running at times when electricity is cheaper. Smart appliances such as hot water systems, pool pumps, dishwashers and in the future electric vehicle chargers, could be linked to an external company, such as your energy supplier. The external company would monitor when the cost of energy falls, and with your agreement would remotely send signals to your appliances so they can run at times when electricity costs are lower and reduce usage when electricity costs are higher. Only smart appliances would be controllable, which means that critical appliances such as life support equipment could not be switched off remotely. **How likely would you be to use smart appliances like this to reduce the cost of your household's energy bills?**

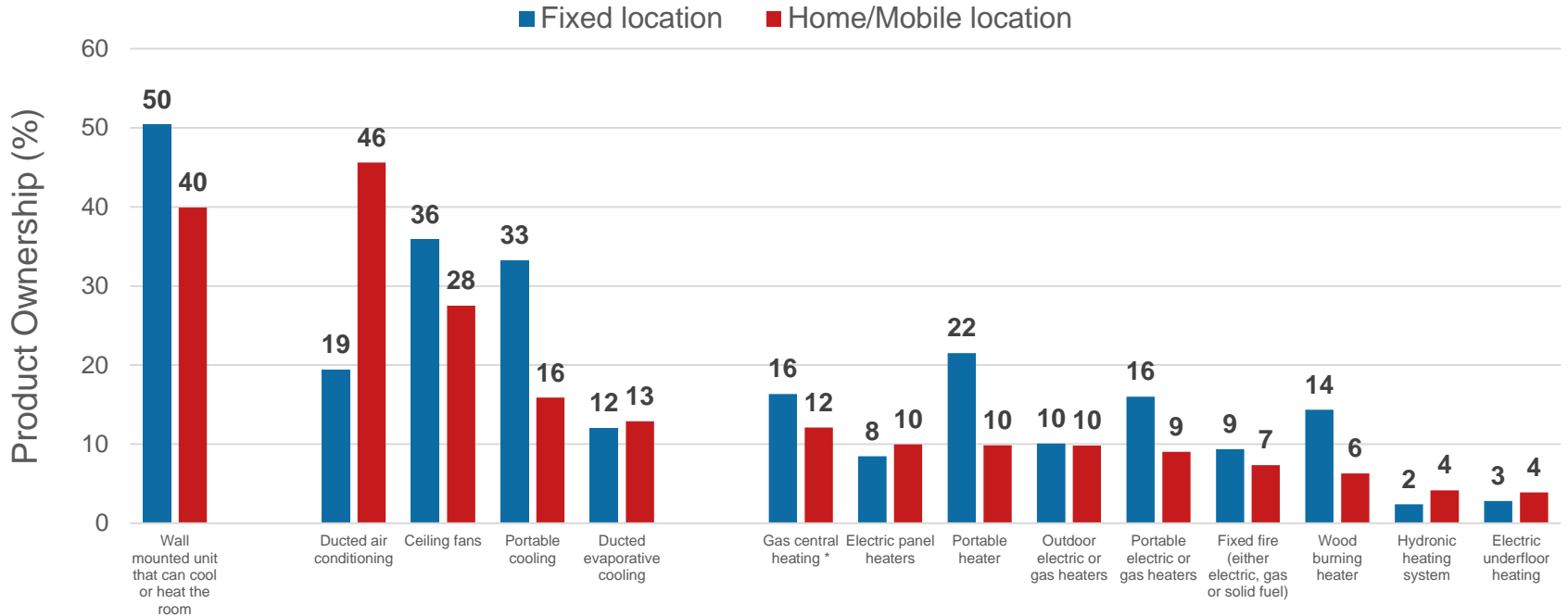
Base size: All businesses operating from home/mobile locations (n=255)

# Ownership

- Businesses operating from fixed locations are more likely than home/mobile businesses to use portable heating and cooling devices. While home/mobile businesses are more likely to have ducted air cooling. Wall-mounted units are the most used heating/cooling appliance.
- 33% of businesses in fixed locations have an electric battery storage capacity in their premises/building.
- Businesses in fixed locations are most likely to use all appliances to monitor and control energy use (digital meter, smart thermostat etc.).



# Products Owned: Heating & Cooling



Heating & Cooling

Cooling only

Heating only

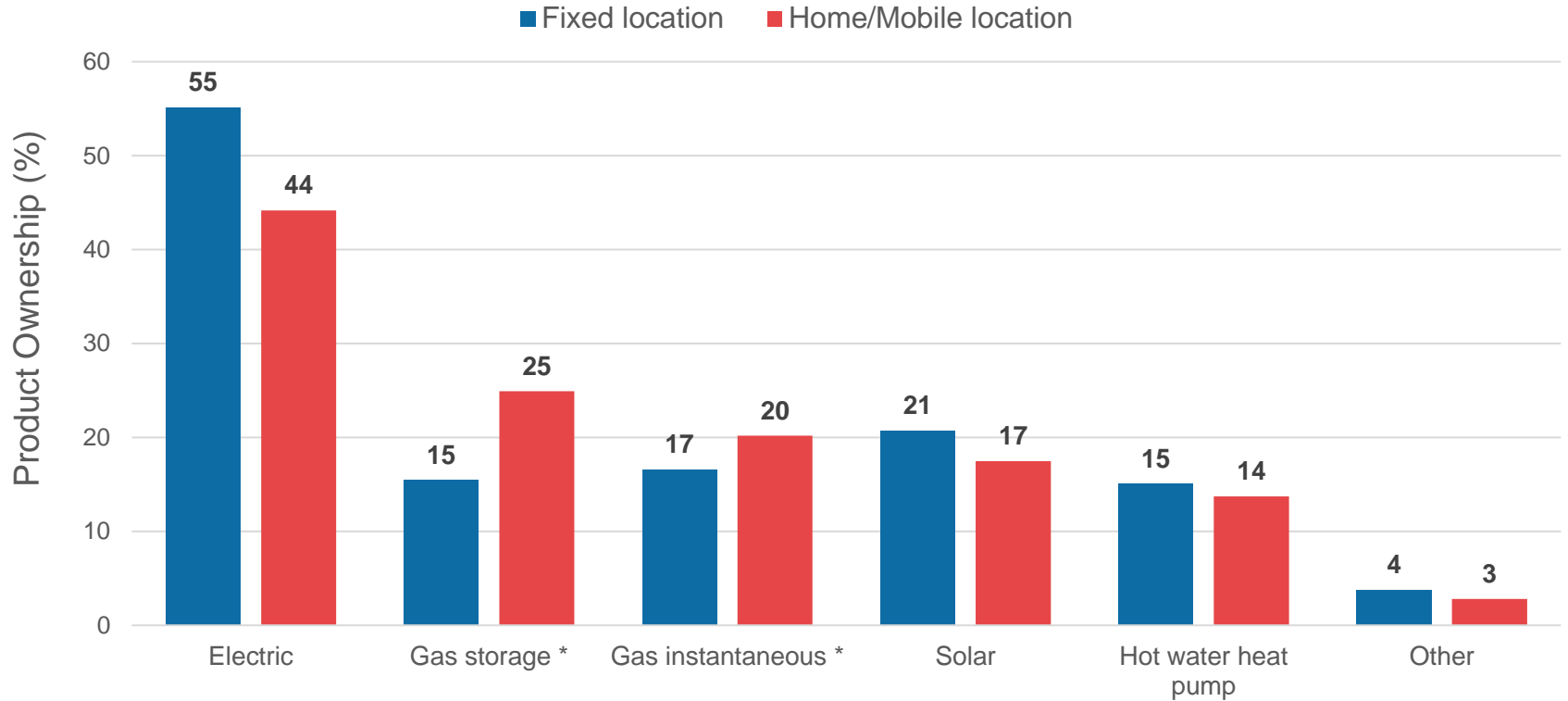
Q: Which of the following do you have for managing the temperature at your place of business/property? MULTIPLE CHOICE

Base size: All businesses in fixed location (n=289), All businesses operating from home/mobile locations (n=255)

\* Gas central heating asked to those with mains gas. Rebased to all businesses



# Products Owned: Hot Water Systems

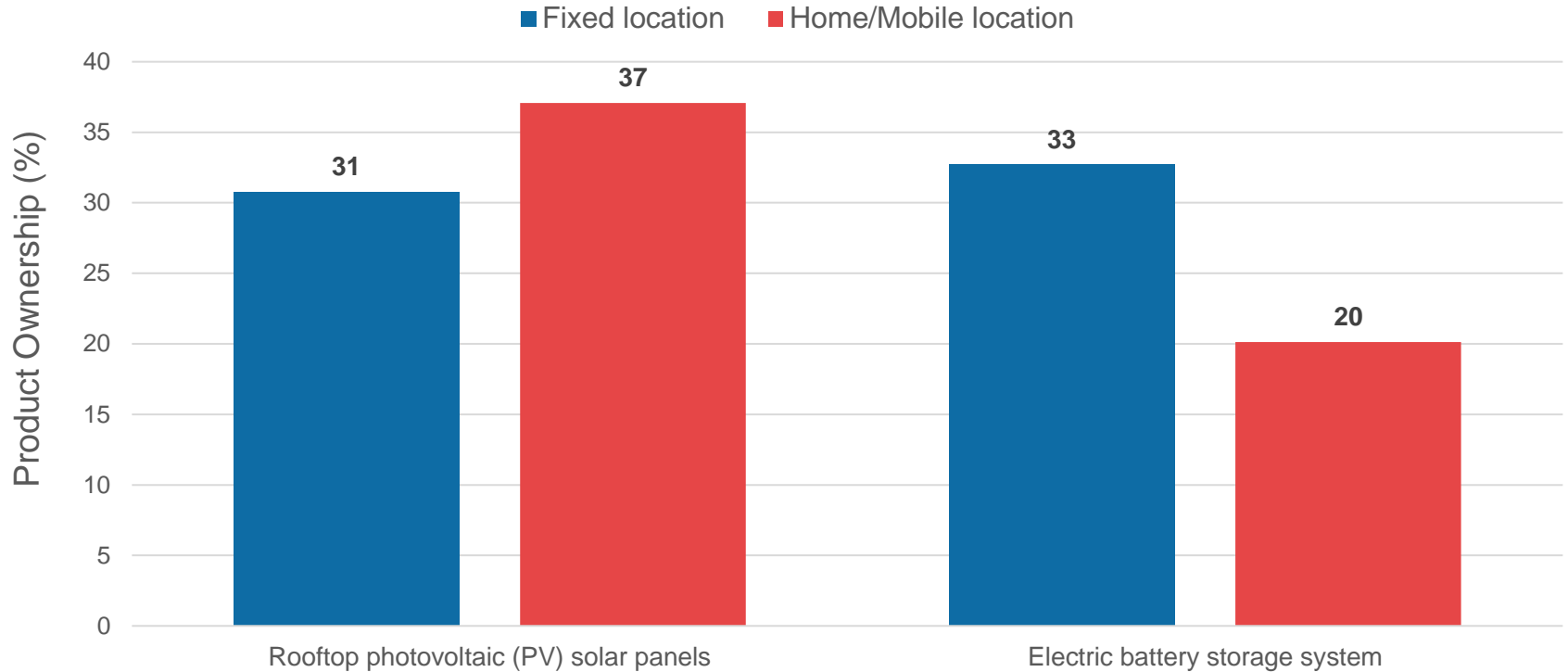


Q: Which hot water systems do you use at your place of business/property? MULTIPLE CHOICE

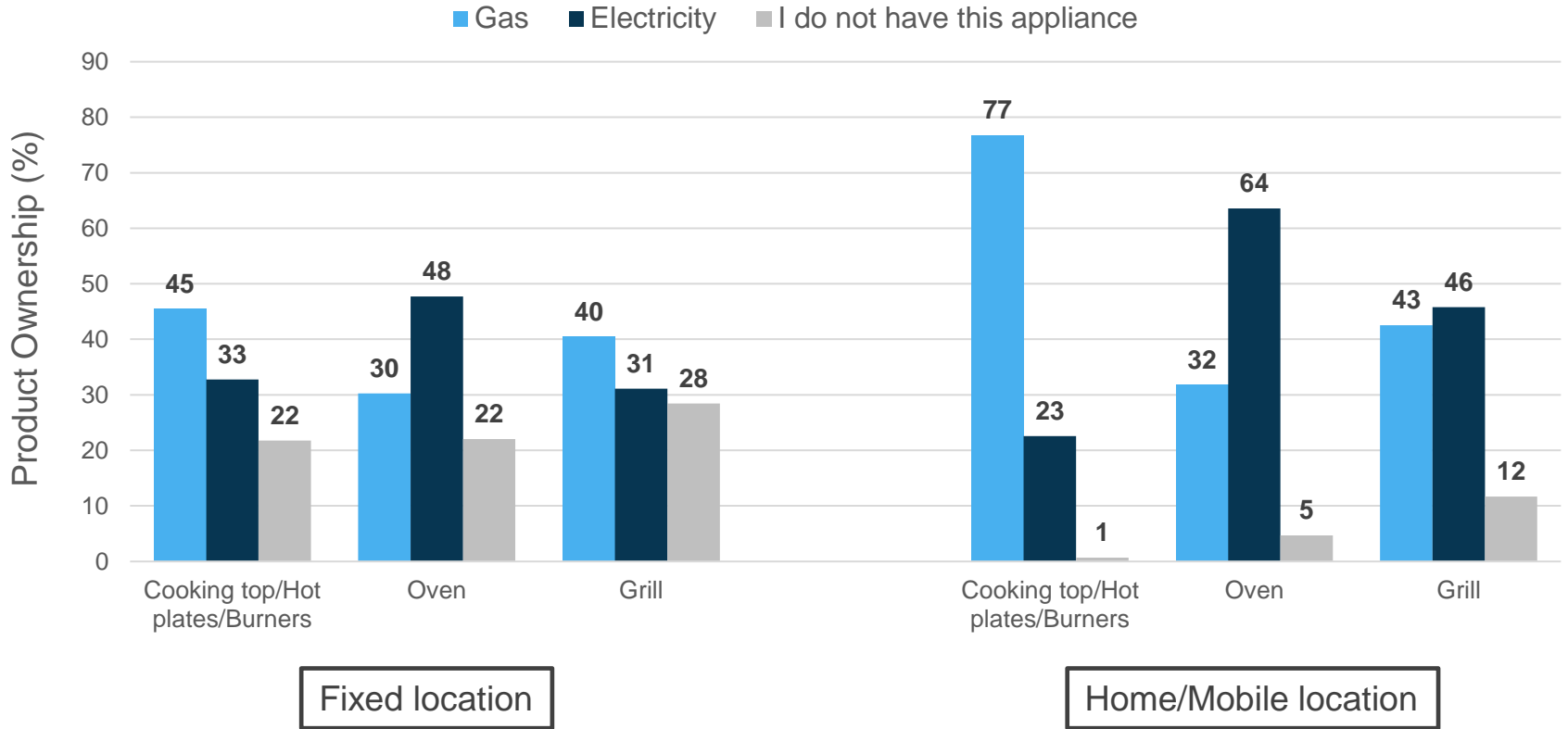
Base size: All businesses in fixed location (n=289), All businesses operating from home/mobile locations (n=255)

\* Gas storage and Gas instantaneous asked to those with mains gas. Rebased to all businesses.

# Products Owned: Electricity Generation and Storage

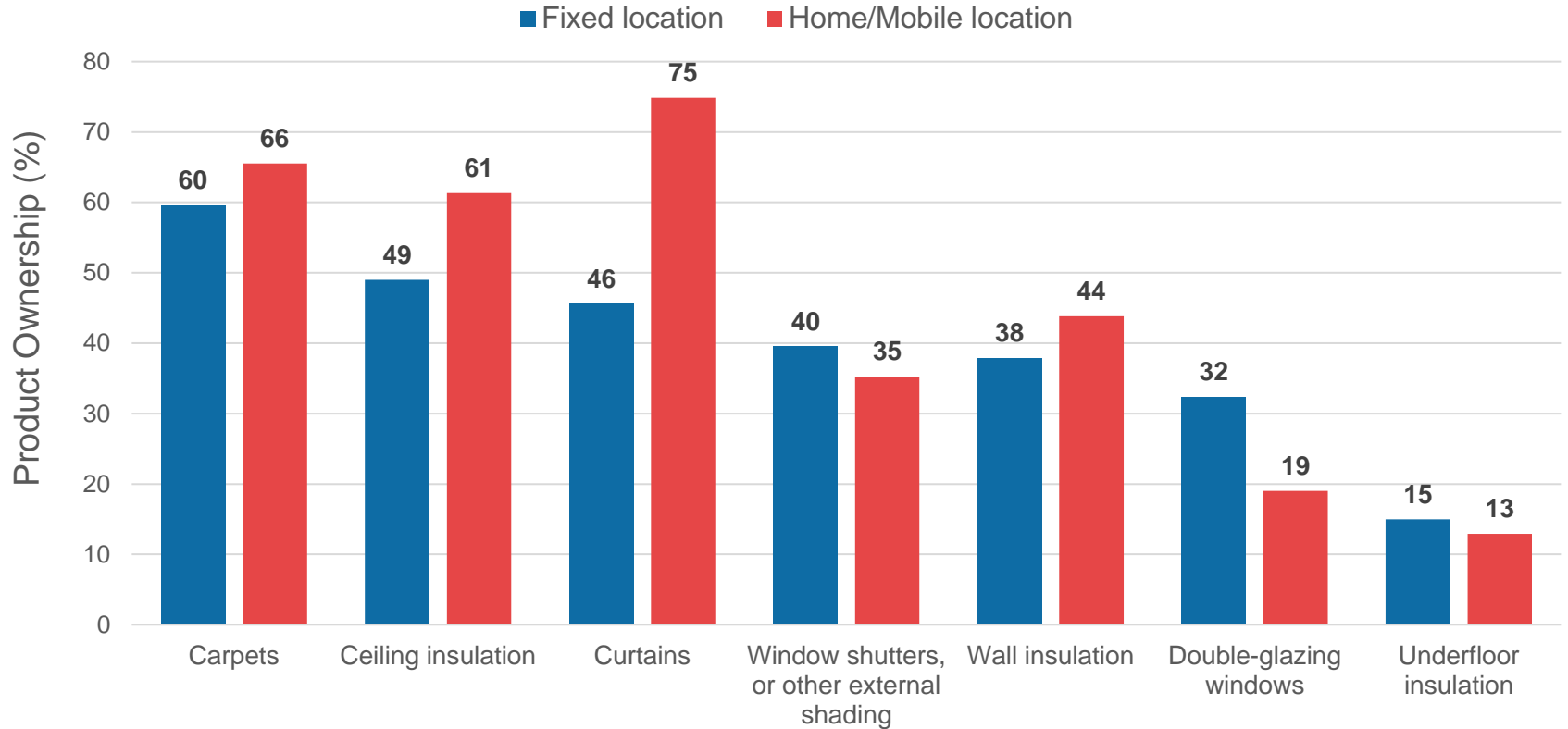


# Products Owned: Cooking



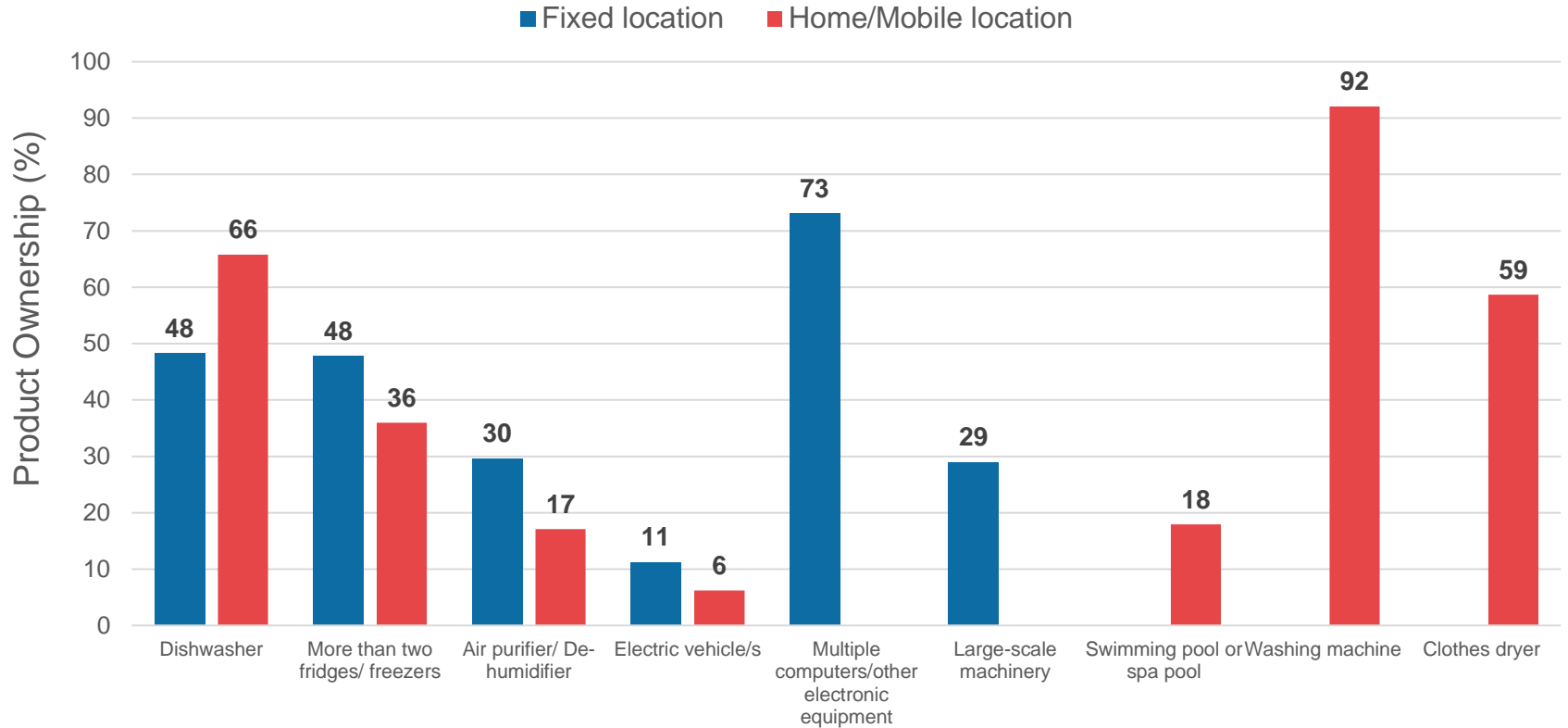
Q: Which energy source do the following cooking appliances use at your place of business/property?  
 Base size: All businesses in fixed location with mains gas (n=156), All businesses operating from home/mobile locations with mains gas (n=170)

# Products Owned: Insulation



Q: Does your place of business/property have any of the following insulation features? MULTIPLE CHOICE  
 Base size: All businesses in fixed location (n=289), All businesses operating from home/mobile locations (n=255)

# Products Owned: Appliances

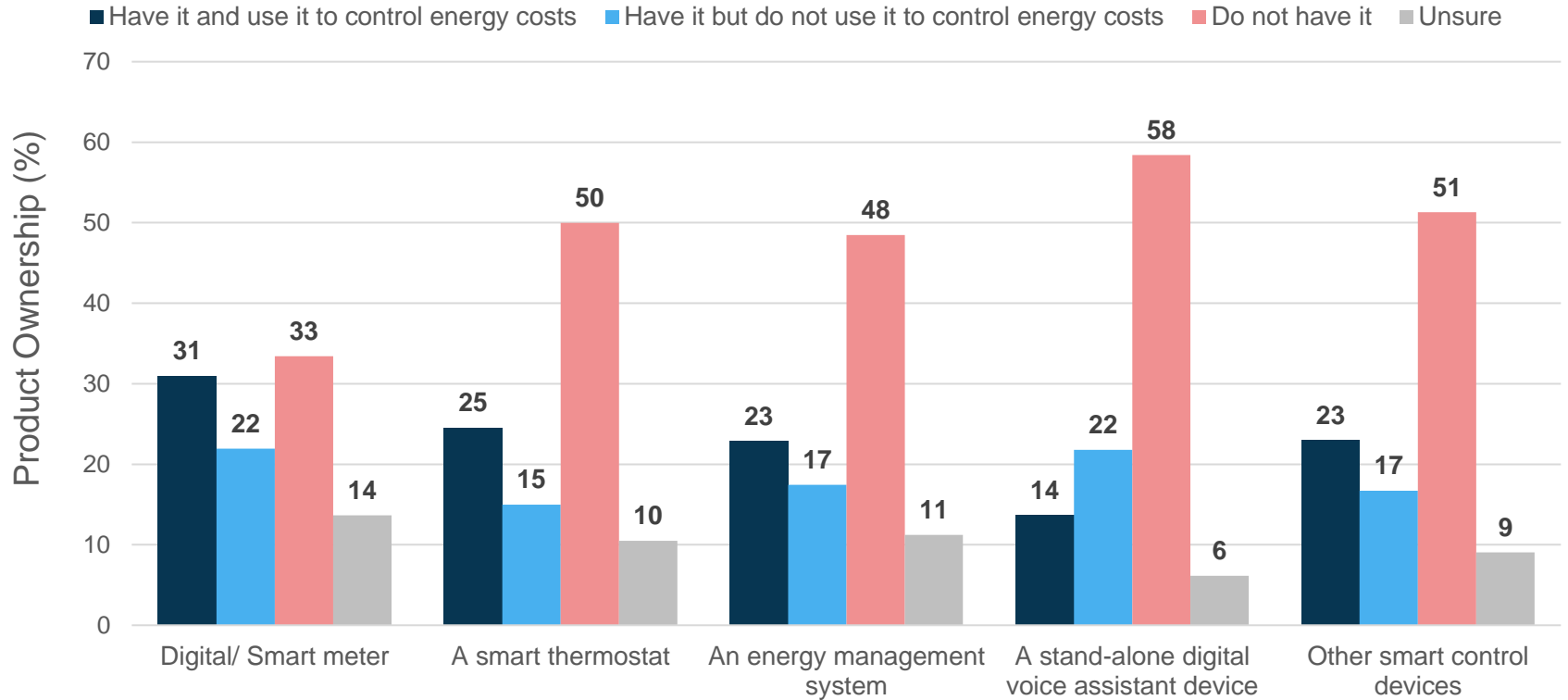


Q: Which of the following electrical appliances do you have at your place of business/property? MULTIPLE CHOICE

Base size: All businesses in fixed location (n=289), All businesses operating from home/mobile locations (n=255)

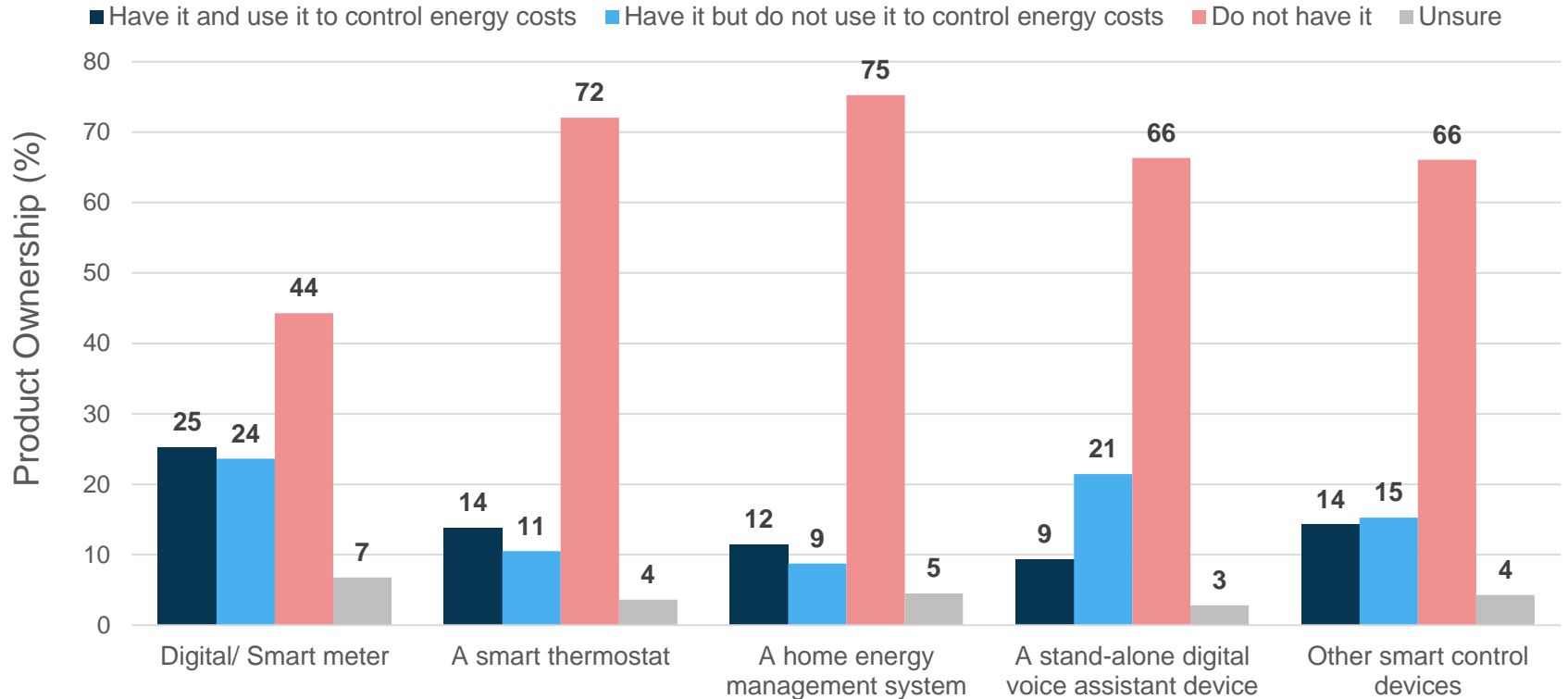
Some products only asked to fixed or home/mobile businesses

# Products Owned: Smart Devices



Q: Which of the following technology do you have in your place of business, and which do you use to help control your energy costs?  
 Base size: All businesses in fixed location (n=289)

# Products Owned: Smart Devices



Q: Which of the following technology do you have in your household, and which do you use to help control your energy costs?  
 Base size: All businesses operating from home/mobile locations (n=255)

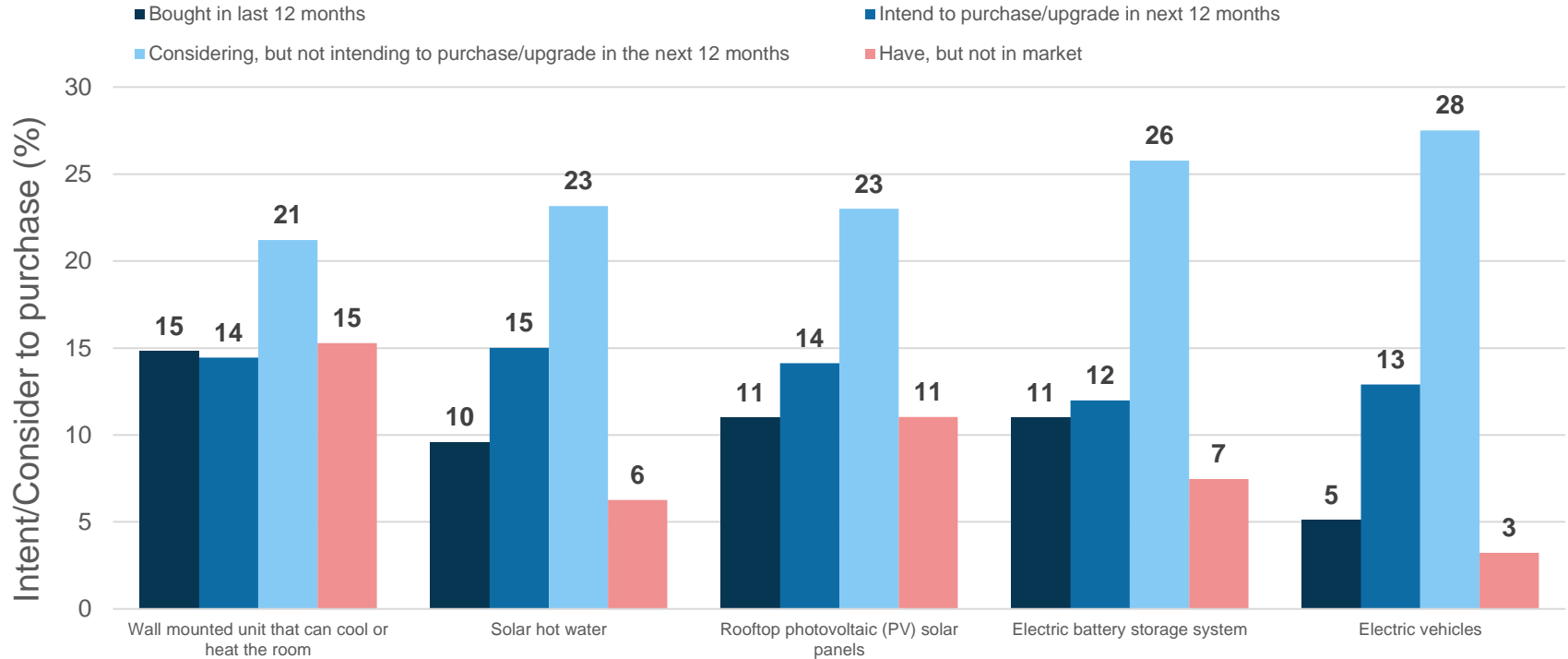
# Upgrade & Intention to purchase

- For fixed location businesses, appliances most likely to be purchased in the next 12 months are solar hot water (15%), solar panels (14%) and wall mounted air conditioning (14%). 11% of businesses operating from home/mobile locations are considering purchasing solar hot water in the next 12 months.
- Electric vehicles are a less immediate purchase, with 13% of fixed location businesses looking to purchase in the next 12 months, but 28% interested somewhere in the future. Among businesses operating from home/mobile locations, 6% are interested in next 12 months and 22% in the future.





# Upgrade & Intention to purchase: Heating and efficiency appliances



Q: Did you purchase or have this appliance or system installed in the last 12 months?

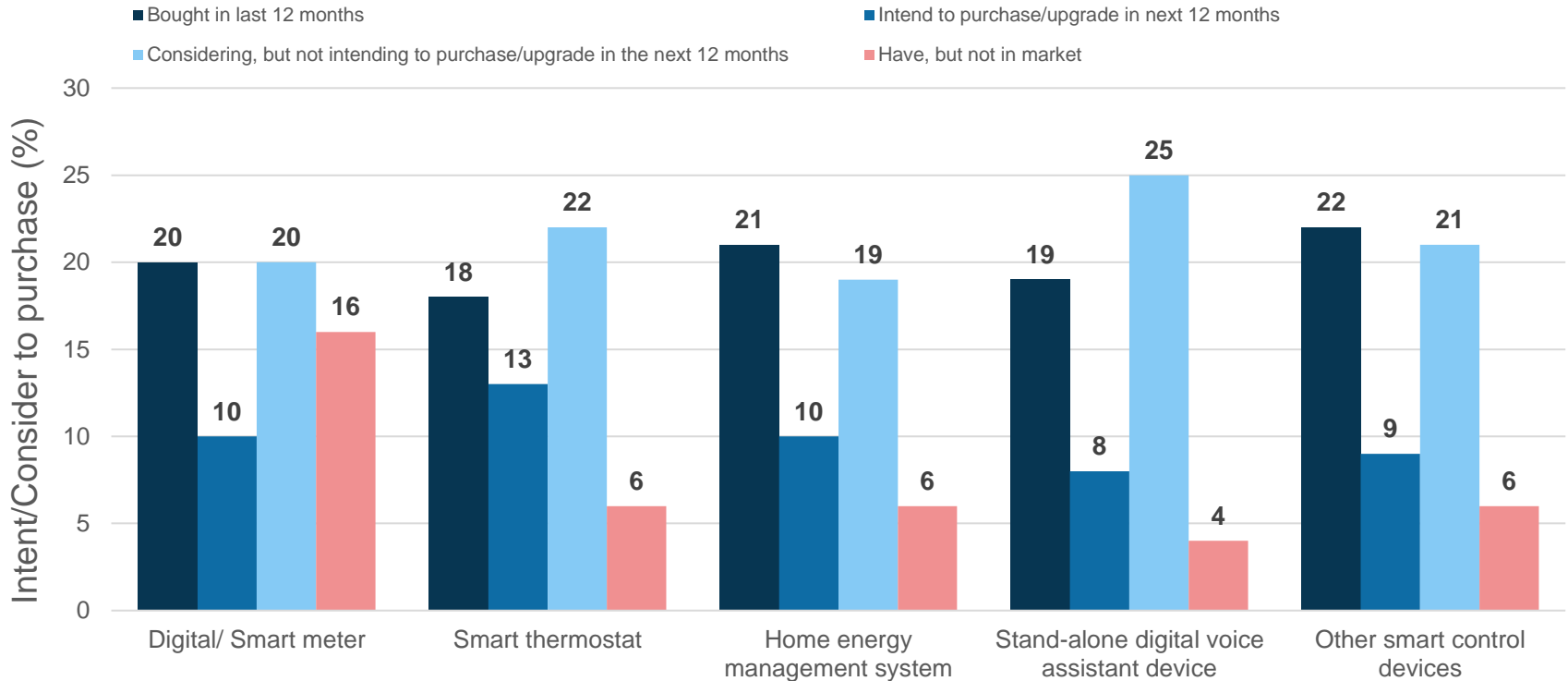
Q: Which of the following are you intending to replace or upgrade in your place of business?

Q: Which of the following are you intending to purchase for your place of business?

Base size: Base size: All businesses in fixed location (n=289)

All questions rebased to all participants. Results for those without product and not in market are excluded from chart.

# Upgrade & Intention to purchase: Smart Devices



Q: Did you purchase or have this appliance or system installed in the last 12 months?

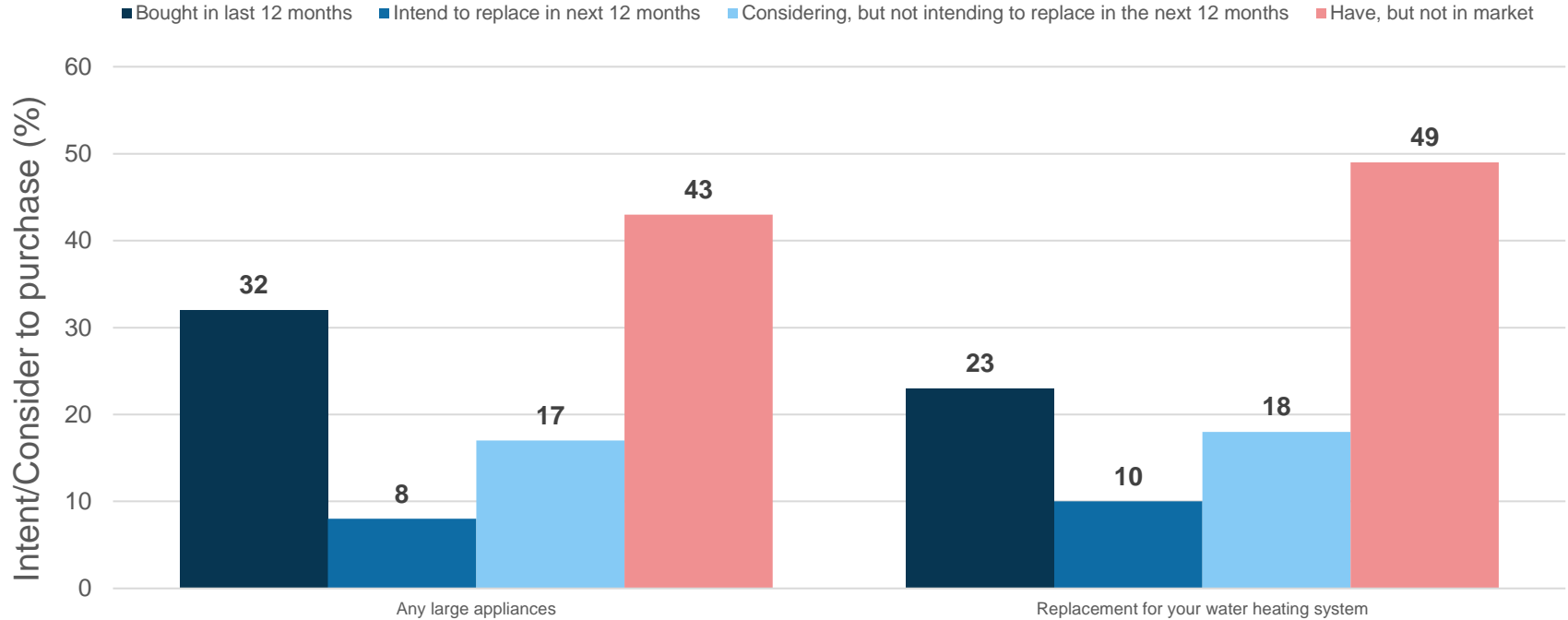
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Q: Which of the following are you intending to purchase for your place of business?

Base size: Base size: All businesses in fixed location (n=289)

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# Upgrade & Intention to purchase: Replacements



Q: Did you purchase or have this appliance or system installed in the last 12 months?

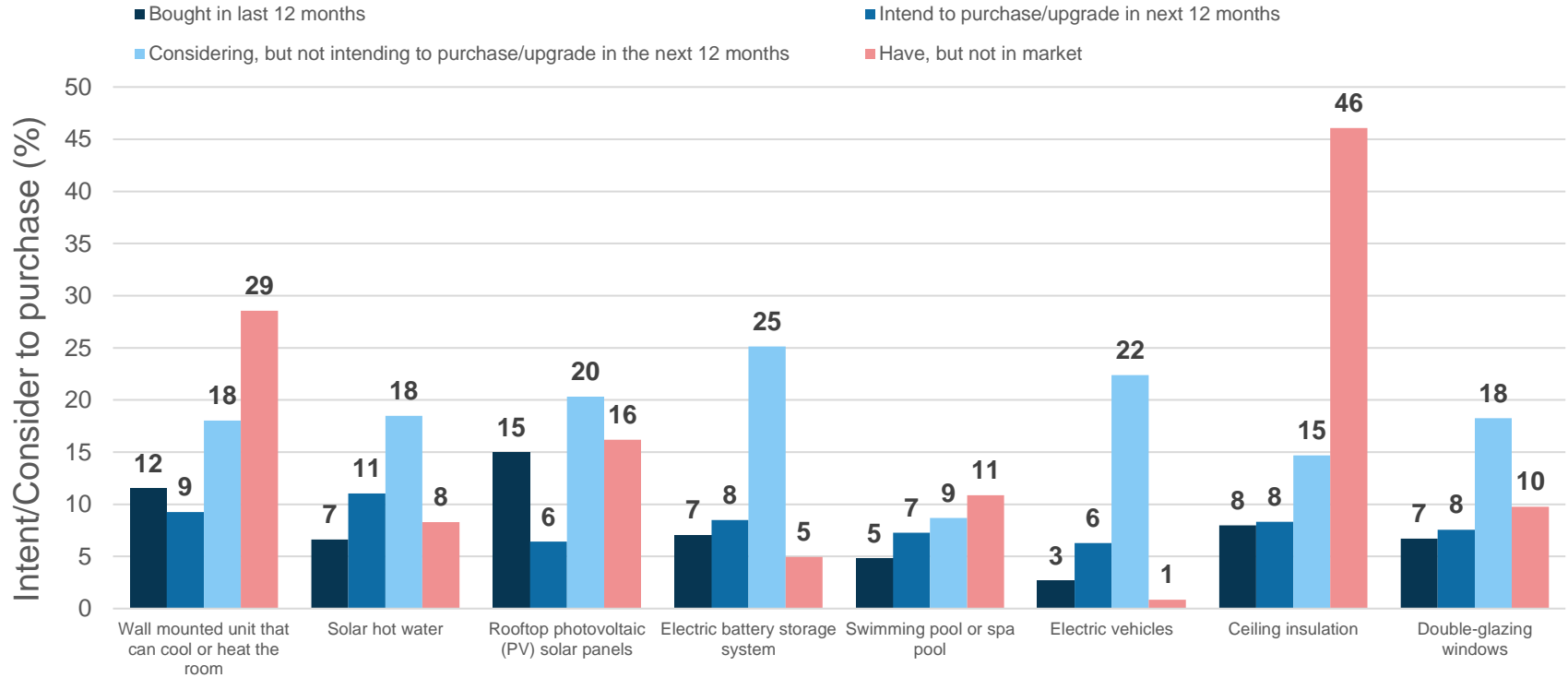
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Q: Which of the following are you intending to purchase for your place of business?

Base size: Base size: All businesses in fixed location (n=289)

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# Upgrade & Intention to purchase: Heating and efficiency appliances



Q: Did you purchase or have this appliance or system installed in the last 12 months?

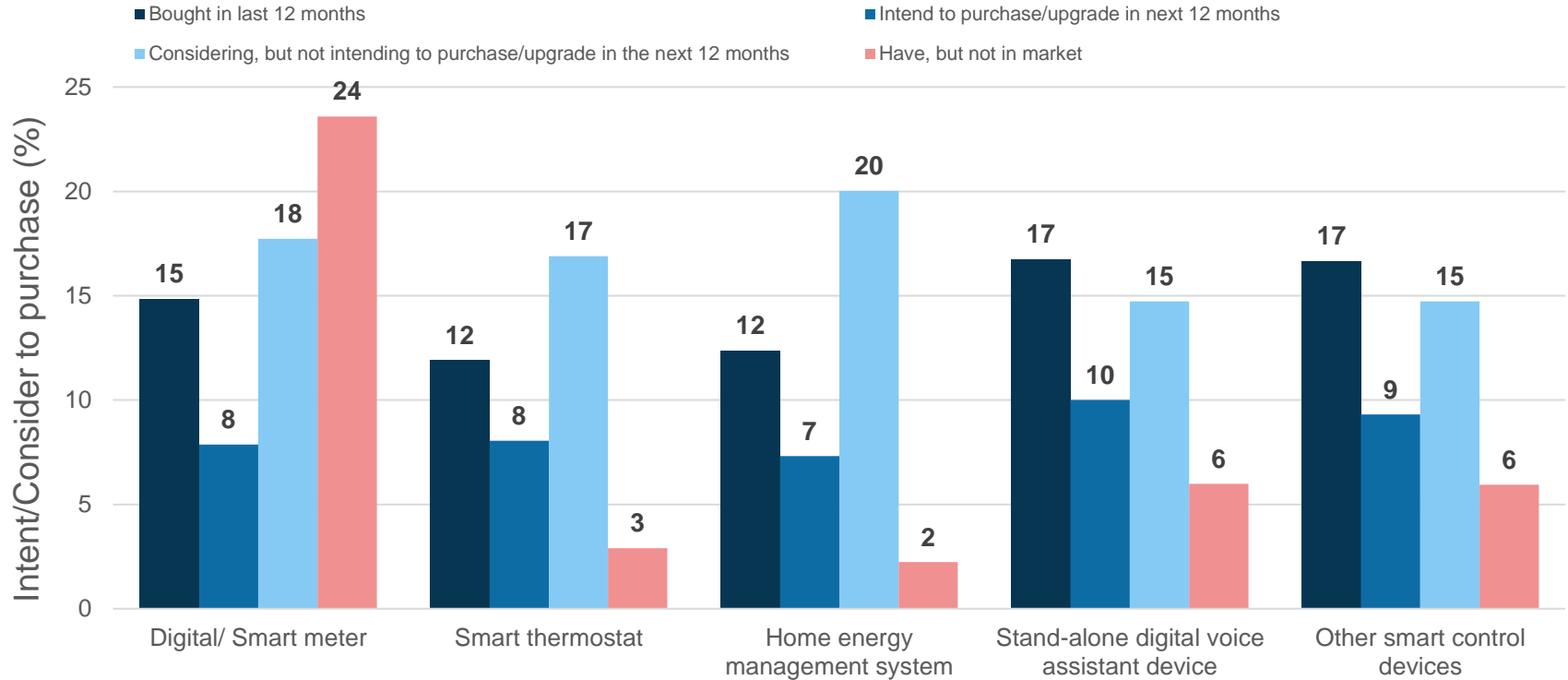
Q: Which of the following are you intending to replace or upgrade in your property?

Q: Which of the following are you intending to purchase for your property?

Base size: All businesses operating from home/mobile locations (n=255)

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# Upgrade & Intention to purchase: Smart Devices



Q: Did you purchase or have this appliance or system installed in the last 12 months?

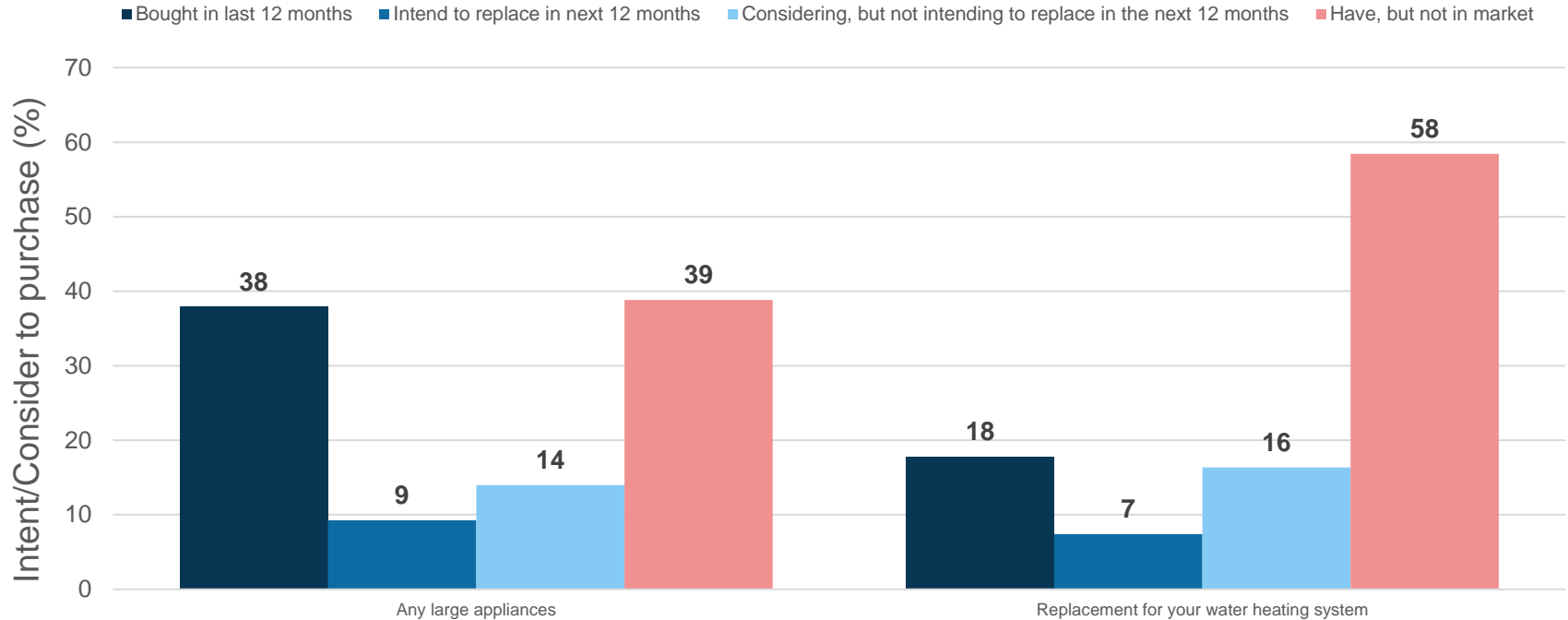
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# Upgrade & Intention to purchase: Replacements



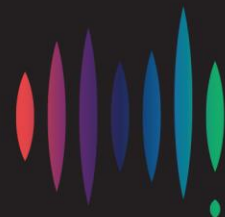
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AUSTRALIA**