Ethnic Communities
Council of NSW Inc

Experiences of Energy Consumption for Culturally and Linguistically Diverse (CALD) communities

Research Report | April 2016

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This project was funded by Energy Consumers Australia (www.energyconsumersaustralia.com.au) as part of its grants process for consumer advocacy projects and research projects for the benefit of consumers of electricity and natural gas.

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Experiences of Energy Consumption for Culturally and Linguistically Diverse (CALD) communities.

EXECUTIVE SUMMARY

The Ethnic Communities' Council of NSW (ECC) is the peak body for all culturally and linguistically diverse (CALD) communities in NSW with a mission to promote the principles of multiculturalism and work towards the further development of a culturally inclusive society. The ECC has been funded by Energy Consumers Australia (ECA) to provide advocacy for CALD consumers in the National Electricity Market (NEM) and represents the Federation of Ethnic Communities' Council in the role.

In 2011 -12 the ECC conducted research into the experiences and concerns of CALD energy consumers and businesses in NSW. The outcomes of this research indicated that CALD householders and businesses did not understand the changes in the energy retail market.

The ECC received funding from Energy Consumers Australia to repeat the research conducted in 2011-12 in 2015, asking many of the same questions so that the change over the last 4 years could be compared. The research instrument used in 2015 – 2016 was expanded to include questions about new and emerging technologies and services and the survey was administered in Victoria as well as NSW to compare the two States.

Survey data was collected by bilingual energy researchers in their communities, in language. The research was quantitative only.

<u>Households</u>

One hundred and forty-five householders were surveyed in 8 languages in NSW and 6 languages in Victoria. The languages spoken were Greek, Cantonese, Mandarin, Arabic, Arabic (Sudanese), Assyrian, Nepali, Tamil, Vietnamese and Hazaragi.

Knowledge change over time.

Although there has been an increase in knowledge about electricity supply over the 4 years those who are newly arrived know less and are less active in the energy market.

The knowledge for all groups has improved during the years between the implementation of the research in 2011 -2012 and 2015-2016. For example, knowledge of supplier and meter has increased. In the 2015-16 research over 80% knew their supplier compared to 70% in 2011-12. A more significant change is in the knowledge of meter type and how it works, which was 3% and zero respectively in the earlier research. Now an average of 40% know what type of meter they have and an average of 24% know how the meter works. However similar to the earlier research, those with the shortest length of time in Australia were the least knowledgeable about energy supply, particularly in regard to the meter and tariff type.

Knowledge about energy efficiency was similar for all of the language groups although the reason for taking action changed, particularly the numbers reporting the reason for change as 'costs and the environment'. This is a change from the earlier research where 'cost saving' was the main reason reported by 80 – 100% of respondents.

In this research respondents were asked about their knowledge of payment assistance. Many knew about the opportunity for assistance however very few had used it even though CALD people are over represented in the two lowest income groups.

State differences

There are some interesting differences between the two States' energy consumers.

Of the Arabic speaking Sudanese respondents in Victoria, 100% knew their metering type but none of them knew how it worked, whereas in NSW the Sudanese and the other Arabic speaking respondents had no knowledge of their metering type or how it worked. It was surprising that the Arabic speaking Sudanese, Mandarin and Nepali speakers in Victoria were much **less** likely to know their tariff type than their NSW counterparts.

The Arabic speaking Sudanese, Nepali and Mandarin speakers were more likely **not** to choose their energy supplier or **not** to know their supplier in Victoria than in NSW.

Approximately 10% of respondents in NSW had PV and 5.5% of Victorians.

Most Victorian Nepali and all Arabic speaking Sudanese speakers wanted the information to be in their own language whereas in NSW it was the opposite. Of those that wanted information in Mandarin, 70% were Victorian. This was less likely in the Mandarin speakers in NSW.

Comparison with Newgate's research for the AEMC

The AEMC contracts Newgate Research to review competition in the National Energy Market on a regular basis. The research is conducted in survey form by telephone and online. Although the questions are not identical some questions are sufficiently similar to compare the results with this research.

When asked a direct question about changing retailer in the last 12 months very few had made a change except for Tamil speakers where 64% had changed (the Tamil speaking respondents are also the most dissatisfied with their supplier). Newgate's research identified that 25% of energy consumers changed supplier in the last 12 months. Assyrians and Arabic speaking respondents had changed more often than Newgate's respondents with an average of 40% and 30% respectively. The rest of the respondents were well below this percentage average with zero Vietnamese, 6% Mandarin, 9% Arabic speaking Sudanese and 10% Hazaragi speaking consumers changing retailer in the last 12 months.

Of those that changed retailer, more than 50% answered that a cheaper rate was the main reason although often accompanied by other reasons, such as recommendations by friends/relatives or telephone or door-to-door marketing by retailers. 27% cited a change of premises was the reason. Reasons for not changing included *did not understand offer (15%), not a better deal (46%) or loyalty to the company (25%)*. These results are similar to those reported by Newgate with 10% stating *too confusing,* 43% *lack of value in change* and *29% happy with current supplier.* As expected a higher number of CALD consumers did not understand the offer.

<u>Businesses</u>

Eighty-three businesses were surveyed in 6 languages in NSW and 5 languages in Victoria. The languages were Vietnamese, Arabic, Greek, Cantonese, Mandarin, Tamil, Assyrian and Nepali. The types of businesses were restaurants (30% NSW & 24% Vic), takeaways (18% NSW & 12%), convenience stores or small groceries (16% NSW & 41%Vic), bakeries (8% NSW), mechanics (8%), beauty shops (6% & 9% Vic) and other businesses (16% NSW & 11% Vic). Almost all of business respondents owned the business but very few owned the premises except for the mechanic businesses.

Most business owners in both States knew their electricity supplier and more in Victoria than NSW business owners knew their gas supplier. There has not been a great deal of change over time in **choosing** supplier. In the 2011-12 research less than 50% had chosen their electricity supplier however the majority had chosen their gas supplier. In the present research the majority had chosen their electricity and gas supplier. The main reason for their choice in the earlier research was costs or discounts and again this was the main reason in the 2015-16 research except for the Cantonese, who when choosing gas supplier, reported that friends and family were the main reason for their choice.

Almost all of the language groups, 88% knew the costs of energy from their bill except for the Greek businesses in Victoria, where none of them knew. Ninety-three per cent of restaurants in NSW knew their costs and only 38% of restaurants in Victoria. In both States 67% of beauty shops knew their costs. Very few businesses actually knew their consumption in kWh.

In the earlier research the majority did not have a contract for electricity but did have a contract for gas which they had negotiated. In the 2015 -16 research the majority of businesses had an electricity contract and, except for the Greek and Vietnamese businesses, the majority had negotiated the contract. The results are similar for gas, where the majority have a contract that was negotiated.

The number of businesses who had changed supplier when asked a direct question was 19%, which is a similar result to Newgate research and an increase from 16% in the earlier research. However, there were differences between language groups. Although there is a slight increase in the number of businesses visited by retailers to change energy supplier the majority did not change. Newgate found that the most often selected reasons for changing were '*cheaper prices and discounts'* in NSW and Victoria. A similar reason was identified for those that changed in the previous ECC research (2011 – 2012). This more recent research (2015-16) found a similar reason for changing supplier in NSW (about 16%) and significantly less in Victoria.

This research provides a comparison between Victorian businesses owners where smart meters are mandatory and flexible tariffs are offered. When asked about their metering type, 49% of the language groups knew what type of meter they had in comparison to 31% NEM wide respondents who claimed they knew that they had a smart/interval meter. Not surprisingly Newgate found that 74% in Victoria and only 14% in NSW knew their metering type. The ECC research found that about 50% knew the type of meter in both States. When asked if they knew how it worked (not asked in Newgate research) 33% said they knew how it worked. The ECC research showed that 22% of respondents in NSW and 50% in Victoria knew how their meter worked. It would appear that half of ethno-specific businesses in Victoria both know what meter they have and also 50% knew how it worked.

When asked about capacity charge 40% of small business people could not answer this question. Of those that did, only 1 business owner had any knowledge of this charge. In NSW there was limited knowledge of other charges and, where a charge was identified, it was commonly a daily supply charge. In Victoria there was no knowledge of any additional charges.

Many of the business owners (22%) did not know their tariff type. The number who were aware that they were on a flat rate tariff was 24% in both States and those that knew they were on a Time of Use (TOU) tariff were different in each state, 58% in NSW and 48% in Victoria respectively. Those that didn't know their type of tariff were 18% in NSW and 27% in Victoria. (Newgate research found that 39% of interviewees across Australia said they were on TOU tariff, 49% in Victoria and 39% in NSW.)

Most business owners in both States were confident they could identify the appliances that used the most energy. Twenty-nine per cent of the businesses **had received** information (similar to BEST project results where 63% **could not recall receiving** information) about energy efficiency and 88% took action in both States for different reasons.

Although 6% of businesses have been offered PV only 2 businesses own PV panels (1 Cantonese and 1 Vietnamese business) and they have a 20 cent feed in tariff. One third of the Mandarin speakers have been offered PV, one quarter of the Greek speakers have been offered PV alone and PV plus storage and one third of the Greek businesses have been offered a package.

In this research 100% of Vietnamese business owners preferred to have information in their own language as did 67% of Mandarin speakers and 43% of Cantonese speakers. This was in contrast to the Greek and Assyrian business owners where 100% preferred Information in English.

<u>Implications for ECC's future work</u>

The most outstanding feature of this research is the diversity of the respondents between language groups. This result reinforces the need for the guide for engaging consumers who speak a language other than English at home, ***Cultural Connections***, prepared by the ECC for the energy industry and government agencies.

The ECC will respond to this research by:

- Encouraging all levels of government to improve energy literacy of CALD energy consumers
- Work with the energy industry on strategies to facilitate CALD energy consumers' understanding of and participation in the energy market
- Encourage the new energy technology industry to engage with CALD communities and ethno-specific business owners.
- Investigate why CALD energy consumers are not accessing payment assistance when they are over represented in the lowest income groups.

Introduction

The Ethnic Communities' Council of NSW (ECC) is the peak body for all culturally and linguistically diverse (CALD) communities in NSW with a mission to promote the principles of multiculturalism and work towards the further development of a culturally inclusive society. The ECC has been funded by Energy Consumers Australia (ECA) to provide advocacy for CALD consumers in the National Electricity Market (NEM) and represents the Federation of Ethnic Communities' Councils in the role.

In 2011-12 the ECC conducted research into the experiences and concerns of CALD energy consumers and businesses. The outcomes of this research indicated that the CALD householders and businesses did not understand the changes in the energy retail market.[1]

The results of the 2011 Census reported 30% of the NSW population speak a language other than English at home and they are mainly based in Sydney. A similar percentage of the Victorian population also speak a language other than English at home (23%). Forty per cent of the small to medium sized business owners in NSW are have a CALD background.[2] The ECC received funding from the Australian government to work in both NSW and Victoria with ethno-specific small to medium sized businesses to increase their knowledge of energy efficiency. The project reached 600 businesses in NSW and 300 in Victoria. The evaluation indicated that 15% of these businesses' managers and owners did not read their energy bills and 25% said it was difficult to understand their bills.[3] The finding that: 'There were very few significant differences by business sector in the survey results. The most frequent differences were by language group'[4] has informed this research.

The ECC received funding from Energy Consumers Australia to repeat the research conducted in 2011-12 in 2015-16, asking many of the same questions so that the change over the last 4 years could be compared. The research instrument in 2015-16 was expanded to include questions about new and emerging technologies and services and the survey was administered in the major capital cities which have the greatest diversity in Victoria and NSW to compare the responses in the two States.

Objectives

The overall objectives of the research were to:

- gain an undertanding of the participation of CALD energy consumers in the National Energy Market (NEM)
- provide support to the ECC and FECCA energy advocacy
- to show the depth and breadth of change in domestic and small business consumers' issues and concerns since 2011
- research the knowledge and participation in emerging opportunities for new products and services in the energy market

1 ECCNSW *Experiences of Energy Consumption for Culturally and Linguistically Diverse (CALD) communities*, 2012
2 Quoted in an address by The Hon. John Ajaka MLC, NSW Minister for Multiculturalism, 2015
3 ECC NSW Business Energy Smart Tips (BEST), *Energy Smart Ethnic Small Businesses*, 2015
4 ibid page 1

Methodology

The ECC repeated the research conducted in 2011-12 expanding it to include additional important questions to gain an understanding of the knowledge of the CALD consumers about issues that are or could have a sigificant impact on their energy costs and use, as well as their knowledge and understanding of emerging products and services in the energy sector. This research was also expanded to include Victorian as well as NSW CALD householders and ethno-specific small and medium sized businesses.

Other questions investigated CALD consumers' knowledge, understanding and use of consumer protections (under both NECF and ACL).

The research was quantitative only. Survey data was collected by bilingual energy researchers in their communities. Initially it was proposed to conduct focus groups to gain qualitative data . This was abandoned as the bilingual educators advised that participants in focus groups would not be comfortable sharing their issues and concerns amoung their cultural community. In some cultures a lack of understanding is considered shameful and in others their reticence is due to fear of having experienced different practices in their country of origin. The ECC expanded the implementation of the research by increasing the numbers surveyed. It was conducted in both NSW and Victoria.

The questions in the survey were designed to be able to be compared to a number of the questions asked in the Newgate research that has informed the AEMC Review of Competition. This has provided a comparison with the results of research conducted in language and culturally appropriate with traditional methods of collecting data. The questions asked in the ECC's 2011-12 survey were repeated to assess the change over time.

Some information on small and medium sized businesses was from the evaluation of the ECC business energy efficiency information project, Business Energy Smart Tips (BEST).[5] This project surveyed over 600 ethno-specific businesses in NSW and 200 in Victoria and collected data by a preliminary survey administered by bilingual energy educators on their first visit. This information has been built on by approaching additional businesses with specific questions to expand our knowledge of CALD business owners' energy market understanding and participation in the market.

CALD household energy bill payers were approached by the energy researchers in groups and individually to build up our knowledge of their concerns. One hundred and forty-five were surveyed in 10 languages, 91 in NSW and 54 in Victoria. The languages spoken were Greek, Cantonese, Mandarin, Arabic, Arabic (Sudanese), Assyrian, Nepali, Tamil, Vietnamese and Hazaragi. This compares to Newgate's research numbers of 402 in NSW and 403 in Victoria[6] and 78 in the previous ECC research[7].

Business owners were surveyed by the bilingual researchers visiting the business during the least busy period of their opening times. Eighty-three businesses were surveyed in 6 languages in NSW and 4 languages in Victoria. Thirty small businesses were surveyed in the previous research and Newgate interviewed a hundred from each State. The languages were Vietnamese, Arabic, Greek, Cantonese, Mandarin, Assyrian, Tamil and Nepali. The types of businesses were Restaurants (30%

5 ECC NSW BEST op cit

6 Newgate Research, Australian Energy Market Commission (AEMC), Nationwide Review of Competition in Retail Energy Markets, Research Report June 2015

7 ECC NSW*, Experiences of Energy Consumption for Culturally and Linguistically Diverse (CALD) communities*, 2012

NSW & 24% Vic), Takeaways (18% NSW & 12% Vic), Convenience stores or small groceries (16% NSW & 41% Vic), bakeries (8% NSW), Mechanics (8% NSW), beauty shops (6% NSW & 9% Vic) and other businesses (16% NSW & 11% Vic).

The 2011-12 survey provided the ECC with supporting data for submissions and to present at forums however the survey questions were limited in scope. This research has expanded the range of questions asked to test understanding and knowledge of, and participation in, new and emerging products and services (such as smart metering, pre- and post-meter energy management systems, distributed generation and storage etc), consumer protection, energy efficient appliances, tariff structures and contracts.

In Victoria the ECC approached the Southern Migrant and Refugee Centre (SMRC) in Dandenong as the ECC Victoria were unable to assist. The ECCV had a change in management since the research was proposed and funded by Energy Consumers Australia. The SMRC nominated some members of their communities who were trained by the research team to deliver the relevant surveys. Both the Assyrians and Nepali speakers were surveyed by bilingual educators who have worked with the ECC NSW on other projects.

The householders and businesses were left with information about the *energymadeasy* website to enable them to participate more effectively in the energy market.

Results

1. **Households**

As mentioned above, 145 householders were surveyed in 8 languages in NSW and 6 languages in Victoria.

Household type

The groupings of householders in the 2011-12 Research by the ECC divided the participants in the research into 3 groups. The same groups are apparent in the present research with an additional newly arrived group:

Group	Language spoken at home	Average length of time in Australia (years)
1	Greek	46
2	Vietnamese, Cantonese. Arabic	28
3	Arabic (Sudanese), Mandarin, Assyrian	13.4
4	Tamil, Nepali, Hazaragi	5.5

Some of the results follow the same pattern as the 2011-12 research in that the shorter the time of residence in Australia the higher number of children under 18 years in the household. As expected home ownership increases with the length of time in Australia. Over 70% of Greek, Mandarin, and Cantonese and 100% of Vietnamese own their own homes. In Victoria none of the respondents are in social housing except the Arabic speaking Sudanese who are 100% in social housing whereas in

NSW, 82% of the Arabic speaking Sudanese rent, 27% of them renting from social housing. Except for the Hazaragi speakers, the majority of respondents live in a house rather than an apartment.

The majority of the respondents speak a language other than English at home, that is an average of 93% except for Group 1.

Knowledge

Over 80% of all respondents knew who their supplier was and approximately 45% knew their meter type. The latter is an improvement on the previous research where only 3% knew their meter type.[8] None of the Arabic speaking respondents, including the Arabic speaking Sudanese, knew their meter type and only 10% of Victorian Nepali speakers knew about their meter type. None of them knew how it worked. The majority of the Assyrians in Victoria are well informed, they know (89%) the type of meter and how it works (67%). If the Assyrians are not included, then in both States less than a quarter knew how the meter works (average is 24%) but this is an improvement since the 2011 -12 research (0%).

The Arabic speaking Sudanese in Victoria (100%) knew their metering type but none of them knew how it worked. In NSW the Sudanese and other Arabic speaking respondents had no knowledge of their metering type or how it worked.

Over 80% of Group 1 did not know their tariff type. The majority of newly arrived migrants did not know their tariff type although 90% of Assyrians in Victoria had taken up a flexible tariff. It was surprising that Arabic speaking Sudanese, Mandarin and Nepali speakers in Victoria were much less likely to know their tariff type than their NSW counterparts.

The research included questions about the respondent's knowledge of energy efficiency and the reasons for taking action on energy efficiency. Similar to the previous research the older migrants in Group 1 had taken little action. A wide range of actions were taken by the other language groups with an increase in respondents taking the action for environmental reasons since the last research. There is little difference between Victoria and NSW based respondents in actions taken.

The majority of the older migrants know about payment assistance but report that they have never used it. None of the Vietnamese speaking respondents knew about payment options and so had not used them whereas a third of the Hazaragi speaking respondents knew about the financial help but none had used it. This result is anomalous, as almost 30% of Hazaragi speakers are in the lowest income group[9]. The Salvation Army 'Salvos Assessment Line' had a much lower percentage of CALD people calling their organisation for assistance than would be expected and the numbers were not representative of the percentage of CALD people in the general population.[10] Tamil speakers know about the payment assistance and use it yet only 10% are in the lowest income groups.[11] Except for Tamil speakers, about a third of the respondents knew about the financial help but of that third, very few reported that they had used payment assistance although the CALD population are over

8 ECCNSW 2012 , op cit
9 ABS Census 2011 income and language data
10 Salvation Army 2016, from data collected from their Assessment Line, private communication
11 ABS 2011, op cit

represented in the lowest income groups according to the 2011 census (20% of Arabic speakers and 30% of Assyrians).[12]

Only a small number of respondents knew about Energy Made Easy however there was a high usage by those who knew about the site.

Choice

Seventy-five percent of Group 1 respondents chose their supplier of energy in comparison to 53% in the 2011-12 survey. In Group 2, 100% of the Vietnamese and the Arabic speaking respondents had chosen their supplier but only 58% of the Cantonese. In Group 3 more than 73% had chosen their supplier and as expected the newly arrived group, with the Nepali speaking at 70%, the Tamil at 36% and Hazaragi at 20%, were the least likely to have chosen their supplier. The Arabic speaking Sudanese, Nepali and Mandarin speakers were more likely to not choose or not know in Victoria than in NSW.

When asked a direct question about changing retailer in the last 12 months very few had made a change except for Tamil speaking respondents, where 64% had changed (note that the Tamil speaking respondents are also the most dissatisfied with their supplier). Newgate's[13] research identified that 25% of energy consumers changed supplier in the last 12 months. Assyrians and Arabic speaking respondents had changed more often than this with an average of 40% and 30% respectively. The rest of the respondents were well below this percentage average with no Vietnamese, 6% Mandarin, 9% Arabic speaking Sudanese and 10% Hazaragi speaking consumers changing retailer in the last 12 months.

Of those that changed retailer more than 50% gave the main prompted reason for the change as a cheaper rate although this was often accompanied by other reasons such as recommendations by friends/relatives or telephone or door-to-door marketing by retailers. 27% cited a change of premises was the reason. Reasons for **not changing** included *did not understand offer (15%), not a better deal (46%) or loyalty to the company (25%)*. These results are similar to those reported by Newgate[14] where 10% stating *too confusing,* 43% *lack of value in change* and *29% happy with current supplier.* As expected a higher number of CALD consumers did not understand the offer.

In the earlier research by the ECC, overall there was a higher number that were happy with their current supplier so this has dropped over the last four to five years to 25%. When asked whether the price had changed over the year the majority thought it had changed but the Nepali, Mandarin and Cantonese speakers were less certain.

The Vietnamese have the lowest number (0%) changing supplier over the last 12 months, had no contact with their supplier, did not question their bill or discuss contracts and charges, and were the most satisfied with their supplier. Those least satisfied with their supplier, the Tamil speaking and Arabic speaking Sudanese respondents, were less likely to discuss with their retailers their charges and contracts and were quite likely to question the bill.

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12 ibid

13 Newgate Research for AEMC Competition Review 2015

14 op cit

The majority of respondents from Group 1 and 2 (except the Vietnamese) as well as the Mandarin speaking Chinese and Nepalese found their bills easy to understand whereas the rest of the respondents, all more recently arrived, had greater difficulty. The Vietnamese and Tamil respondents were least likely to look at their bills. This result was similar for both States.

Approximately 10% of respondents in NSW and 5.5% of Victorians had solar PV. All those that have PV own their home in both States. It is not surprising that the Vietnamese have the highest number of PV (30%) and all Vietnamese respondents owned their own home. Of the 30% of Vietnamese that have PV only two thirds were offered PV by the industry. Of the Chinese that have PV (11% of Cantonese and 20% 0f Mandarin speakers) only a half received an offer of PV from the industry. Among those that do not have PV many have refused the offer from industry. Home ownership does not mean that the owners will install PV although they may receive more offers. For example, Greek or Assyrian respondents, of whom the majority own their own home, have not installed PV although they have received the highest number of offers. The most recently arrived such as the Hazaragi and Tamil are most likely to rent (Hazaragi 100%), have not installed PV and have not received any offers from industry.

Very few of the respondents (1 Arabic, 1 Assyrian and 2 Mandarin speakers) have received offers for the more advanced technology of storage or packages that include both PV and storage. When asked who they would contact if the technology failed to function very few (20% or less) knew. Except for the Nepali speakers, those longest in Australia were more likely to answer that they would contact the supplier.

Reliability of supply

When questioned about their experiences of an interruption of service there were no differences between States for electricity and no differences of interruptions in gas supply. The Vietnamese in NSW had experienced the highest percentage of disruptions and the Hazara in Victoria. In the previous research [15] it was the migrants who had been in Australia for the longest time that had experienced the most interruptions to supply. Length of time in Australia is no longer significant in whether interruptions to electricity supply are experienced. For the 18% of Arabic speaking Sudanese respondents who experienced an interruption to electricity supply, 50% reported the reason given was non-payment however there were only 2 Arabic speaking Sudanese and 1 Mandarin speaking respondent that gave non-payment as a reason. The most common reason for the interruptions was winds/storm events or accidents by workers in the area.

The actions taken in response to the interruption to supply were varied. Sixty-seven percent of the Group 1 respondents contacted the supplier although only a quarter of the respondents in this group had experienced an interruption. Those that did experience interruptions, the majority of the Vietnamese took no action and the Assyrians that were affected contacted the supplier. Fifty per cent of the Arabic speaking consumers experienced interruptions, and 50% contacted the supplier while 50% took no action. For the small numbers of Arabic speaking Sudanese and Tamil speaking people who experienced an interruption, 75% and 83% respectively contacted the supplier. The

[15] ECCNSW 2012, op cit

migrants that have been in Australia longest have become more active in contacting the supplier in response to an interruption of supply since 2011-12[16].

Very few gas consumers experienced interruptions to supply with half of those affected being due to non-payment of bill and the remainder being a result of work practice or accident.

Preferences

The preference for delivery was predominantly by mail for all groups. Only Mandarin speakers at 42% were above the majority (the next highest being 22%) for delivery electronically. There was very little difference between States in response to either payment method preference or delivery of the bill.

When asked about bill paying, the Post Office was the preferred option for payments however the numbers preferring to pay at the Post Office has decreased since the 2011 survey. [17]

For the Vietnamese (100%) their preferred language of communication is Vietnamese and for the Cantonese speakers (68%) it is Cantonese. Both Assyrians and Arabic speakers preferred English as did the Tamil speakers (55%) and almost half of the Arabic speaking Sudanese, Greek and Hazaragi speakers. Although the other 50% of the Arabic speaking Sudanese, Greek and Hazaragi speakers wanted information to be provided in their own language – none were equivocal.

There were differences by State: Most Victorian Nepali and all Sudanese speakers wanted the information to be in their own language whereas in NSW it was the opposite. Of those that wanted Mandarin (45%) only, 70% were Victorian. This was less likely for the Mandarin speakers in NSW.

2. <u>Businesses</u>

As indicated earlier 83 businesses were surveyed in 5 languages in NSW and 4 languages in Victoria. The languages were Vietnamese, Arabic, Greek, Cantonese, Mandarin, Assyrian, Tamil and Nepali. The types of businesses were restaurants (30% NSW & 24% Vic), takeaways (18% NSW & 12% Vic), convenience stores or small groceries (16% NSW & 41% Vic), bakeries (8% NSW), mechanics (8% NSW), beauty shops (6% NSW & 9% Vic) and other businesses (16% NSW & 11% Vic).

The restaurants were spread across all language groups but were predominantly Cantonese in NSW. Vietnamese dominated the bakeries. Takeaway businesses were mainly Arabic and Cantonese although there were some others languages represented. Otherwise the business types were spread across the languages except beauty shops which were not owned by Vietnamese or Tamil speakers.

The number of years they had been in business ranged between 30 years for restaurants and less than 10 years for all the others. Almost all of business respondents owned the business but very few owned the premises except for the mechanic businesses. For example, although almost all convenience stores/small groceries owned their business, none of them owned their premises.

Fifty-four percent were connected to electricity only and 43% to both gas and electricity. 1% had solar hot water and 2% solar PV. None of the businesses in Victoria had solar hot water or solar PV.

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16 ibid
17 ibid

In NSW 1 of 4 bakeries and 1 of 15 restaurants had solar PV and 1 of the restaurants was the only business that had solar hot water. Seventy-five per cent of NSW businesses interviewed were food related and none of the other business types had PV or solar hot water. In comparison Newgate's research[18] surveyed 100 small to medium sized businesses in each State and found 15% of small to medium sized businesses had PV in NSW and 12% in Victoria. When asked in the current research if they knew who they would contact if these technologies failed to function only the Nepali (100%, although they did not have PV or solar hot water), and the Vietnamese speakers (40%), answered yes.

The number of employees in each business type were very similar in NSW and Victoria except the NSW beauty shops had almost twice the number of employees as the Victorian beauty shops.

The cost of energy differed in the restaurants and the beauty shops across the two States. The type of fuel does not account for the different energy costs in beauty shops and takeaways. Only 33% per cent of beauty shops in Victoria were dual fuel and none in NSW and the cost of energy in the all-electric NSW beauty shops was a third of the energy cost of beauty shops in Victoria even though the staff numbers (or size of business) were twice that of the Victorian beauty shops. Whereas takeaways in Victoria were all dual fuel and only 75% were dual fuel in NSW, the average of costs of fuel were almost the same and the staff numbers were similar. All similar businesses in each State have a similar $ per quarter costs with the exception of 2 bakeries in NSW and one restaurant in Victoria ($9,500/quarter). As this restaurant had only 3 staff it could be interpreted as being mistaken for an annual bill and when converted to a quarterly bill is similar to the other dual fuel restaurants in both NSW and Victoria.

The businesses knew the costs in dollars but not the business energy use in kWh even with access to their bill during the interview.

Choices and knowledge

97% and 96% of businesses knew their electricity supplier in NSW and Victoria respectively and in Victoria, 95% knew their gas supplier. Only 80% of those with a gas connection in NSW knew their gas supplier.

In 2011-12 research less than 50% had chosen their electricity supplier however the majority chose their gas supplier. In the present research the majority had chosen both their electricity and gas supplier. The main reason for their choice in the earlier research was cost or discounts and again this was the main reason in the 2015-16 research except for the Cantonese, who when choosing a gas supplier reported that friends and family recommendations were the main reason for their choice. Another exception is the Greek businesses. The majority had chosen their electricity and gas supplier because of loyalty although gas was also chosen equally because of family and friends' recommendations. The majority of Tamil businesses stayed loyal to their gas supplier.

In the earlier research the majority did not have a contract for electricity but did have a contract for gas which they had negotiated. In 2015 -16 research the majority of businesses had an electricity contract and, except for the Greek and Vietnamese businesses, the majority had negotiated a contract. The results are similar for gas, where the majority had a contract that had been negotiated except for the Vietnamese and Cantonese who did not negotiate a contract. Very few Greek businesses have gas connected.

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[18] Newgate 2015 op cit

Almost all of the language groups (88%) knew the costs of energy from their bill except for the Greek businesses in Victoria where none of them knew. Ninety-three per cent of restaurants in NSW knew their bill and only 38% of restaurants in Victoria. In both States 67% of beauty shops knew their bill. As indicated above very few actually knew their consumption in kWh.

When asked about their metering type, 49% of the language groups knew what type of meter they had in comparison to 31% of the NEM wide respondents who said they knew that they had a smart/interval meter. Not surprisingly Newgate found that 74% in Victoria and only 14% in NSW [19] knew their meter type. The ECC research found that about 50% knew the type of meter in both States. When asked if they knew how it worked (not asked in Newgate research) 33% said they knew how it worked. The ECC research showed that 22% of NSW and 50% of Victorians said they knew how their meter worked. It would appear that half of ethno-specific businesses in Victoria know both what meter they have and also know how it works.

When asked about capacity charges, 40% of small business people could not answer this question. Of those that did only 1 business had any knowledge of this charge. It must be taken into account that the highest kWh for the sample interviewed (only 2 in Victoria answered this question and 10 in NSW) was 24,225 kWh per quarter and the lowest was 700 kWh per quarter. The biggest in NSW was the 24,225 kWh per quarter and the next biggest is 12,620 kWh, both bakeries. In Victoria the highest energy use, which is lower than any NSW business energy use, is a beauty shop which uses 14,000 kWh per quarter.

In NSW there was limited knowledge of other charges and where a charge was identified it was commonly a daily supply charge. In Victoria there was no knowledge of any additional charges.

Many of the businesses (22%) did not know their tariff type and this was highest in convenience stores and small groceries and with the Greek (67%) and Mandarin (50%) speakers. The majority of the Assyrian business owners knew they were on a TOU tariff and none of the Greek speakers knew, both Victorian. The majority of Vietnamese (NSW based) were on a flat tariff (50%) with only 10% that did not know. The ECC's 2014 project BEST found that 51% of ethno-specific businesses did not know their tariff type with the Vietnamese (69%) and Arabic (66%) businesses more likely to not know their tariff type than the other language groups.[20] In this research 24% knew they were on a flat rate in both States and the percentage of those that knew they were on a TOU was different in each State, 59% in NSW and 48% in Victoria. Those that didn't know their tariff type were 18% in NSW and 27% in Victoria. Newgate research found that 39% of interviewees across Australia said they were on TOU tariff, 49% in Victoria and 39% in NSW. [21]

Most business in both States were confident they could identify the appliances that used the most energy. The identified appliance differed over business type. Knowledge of the highest energy using appliances had similar results across languages. Overall 29% of the businesses had received information (similar to BEST results where 63% could **not recall** receiving information[22]) about energy efficiency and 88% took action in both States for different reasons. Forty-nine percent took action to reduce costs, 51% for both cost and environmental reasons and 24% to be more competitive. 100% of Vietnamese and 89% of Arabic businesses took action for both costs and environment and none of the Greek, Assyrian or Tamil businesses took action for these reasons although all of the Greek, Assyrian and 67% of Tamil businesses took action to reduce costs. The

[19] Newgate 2015 op cit page 353

[20] ECCNSW BEST 2015, op cit

[21] Newgate 2015 op cit

[22] ECCNSW BEST 2015 op cit

reason for not taking action included lack of time and resources, coupled with staff training/unwillingness to change and cost/risk although there were only a small number in each State. In Victoria the most common reason was that they were unsure what to do and did not own the premises.

When asked how they got the information the following table shows it came from different sources of information and it is very different for the different language groups. The Assyrians and Greek businesses had not received information and very few of all the businesses had gained information from the electronic media.

Energy productivity information sources				Overall reply 27/84 (32%)	
Group	**Energy supplier or equipment supplier**	**Council visits or workshops**	**Family, friends, community**	**Traditional media (TV, newspapers, radio)**	**Electronic media**
Overall	**41%**	**52%**	**22%**	**22%**	**26%**
Vietnamese	**50%**	**0%**	**50%**	**0%**	**0%**
Tamil	**33%**	**50%**	**17%**	**17%**	**33%**
Nepalese	**20%**	**20%**	**20%**	**20%**	**40%**
Mandarin	**100%**	**100%**	**0%**	**0%**	**0%**
Greek	**NA**	**NA**	**NA**	**NA**	**NA**
Cantonese	**43%**	**43%**	**29%**	**43%**	**43%**
Assyrian	**NA**	**NA**	**NA**	**NA**	**NA**
Arabic	**0%**	**50%**	**0%**	**50%**	**0%**
Most respondents indicated more than one source of information					

Experiences

The number of business owners who had changed supplier when asked a direct question was 19%, which is a similar result to Newgate research and an increase from 16% in the earlier ECC research.[23] However there were differences between language groups. Arabic (38%), Cantonese (30%) and Vietnamese (30%) that had changed were higher and the Tamil, Greek and Assyrian businesses had not changed. When asked if they had been contacted by the electricity supplier regarding a change, 59% reported that they had been contacted (the same number as the previous research). The highest were the Vietnamese businesses where all had been contacted and the lowest were Assyrian where none had been contacted. In the previous research the number of Vietnamese businesses visited was 25% whereas the number of Cantonese visited was 75% in both this and the previous research. Newgate found that 48% in NSW and 71% in Victoria had been contacted to change supplier of electricity in the last 12 months. This ECC research found little difference between States. Very few Assyrian (0%) and Arabic (25%) speakers had been contacted by gas suppliers whereas 56% of the Cantonese, and Mandarin, Greek and Tamil speaking (all 50%) business owners had been contacted.

Newgate [24]found that the most often selected reasons given for changing were '*cheaper prices'* and *'discounts'* in NSW and Victoria. Similar reasons were identified for those that changed in the previous ECC research. The current research (2015-16) also found similar reasons for changing

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[23] Newgate 2015 and ECCNSW 2012, op cit

[24] Newgate 2015 op cit

supplier in NSW (about 16%) and significantly less in Victoria. However, 69% of business owners in NSW and 75% in Victoria indicated that the reason for **not changing** was that *'they didn't think it was a better deal'* and 22% and 14% respectively stated loyalty to suppler as the reason and 9% and 7% said they did not understand the offer. The most common reason given in Newgate research was '*too busy/lack of time*' in both States and a similar number said they did not understand or in Newgate's words it was *'too confusing'*.

A high percentage of business owners did know what sort of tariff they are on, especially convenience stores in both States, restaurants/takeaways in Victoria and beauty shops in NSW. Only a very few of the respondents in both States had changed their tariff type.

When asked if the respondents had contacted the suppliers to question their bill the Assyrian, Nepali, Arabic and Tamil speaking business owners reported that almost 100% had, while none of the Greek, Mandarin and Vietnamese speaking business owners had done so. In comparison, high numbers of Greek and 100% of the Mandarin speaking business owners had discussed contracts and charges with suppliers. The Vietnamese had neither questioned their bill or discussed contracts and charges with suppliers. The differences between the different language business owners was greater than any differences between States. The previous ECC research showed that two thirds of businesses had not contacted their supplier to negotiate a contract.

Satisfaction with the supplier:

Energy supply satisfaction			
Electricity Supplier			**Sample size = 83**
Group	**Very satisfied → somewhat satisfied**	**Neither → somewhat dissatisfied → very dissatisfied**	**Did not know**
Overall	**42%**	**57%**	**2%**
Vietnamese	**30%**	**70%**	**0%**
Tamil	**0%**	**100%**	**0%**
Nepalese	**50%**	**50%**	**1%**
Mandarin	**50%**	**50%**	**0%**
Greek	**50%**	**50%**	**0%**
Cantonese	**33%**	**67%**	**1%**
Assyrian	**100%**	**0%**	**0%**
Arabic	**58%**	**42%**	**0%**
Gas Supplier			**Sample size = 37**
Group	**Very satisfied – somewhat satisfied**	**Neither – somewhat dissatisfied – very dissatisfied**	**Did not know**
Overall	**35%**	**65%**	**0%**
Vietnamese	**0%**	**100%**	**0%**
Tamil	**0%**	**100%**	**0%**
Nepalese	**55%**	**45%**	**0%**
Mandarin	**0%**	**100%**	**0%**
Greek	**25%**	**75%**	**0%**
Cantonese	**33%**	**67%**	**0%**
Assyrian	**NA**	**NA**	**NA**
Arabic	**50%**	**50%**	**0%**

Fifty-four percent said they found the electricity bill easy to understand and, similar to the BEST project[25] results, 28% said it was either a bit or very difficult (26% said it was difficult in BEST pre-project) and 18% were unsure or didn't look at their bill (15% in BEST did not look at bill).

Ninety-six percent of businesses knew who their supplier was and 90% knew their gas supplier. This was the same across the two States and similar to the results of the 2011-12 survey.

The majority of respondents (63%) viewed that the price of electricity was increasing. 100% of Assyrians and Vietnamese thought the prices were increasing and 86% of Tamil businesses. 50% of Mandarin speaking businesses responded that the prices were increasing and 50% that the prices were decreasing. Only an average of 9% thought that the prices were decreasing across language groups. Cantonese were the next highest to Mandarin in responding that the prices were decreasing (23%). In 2011-2012 research 90% thought prices were rising with only Tamil business owners responding that it had stayed the same or decreased.

Although 6% of businesses have been offered PV only 2 businesses own solar PV panels (1 Cantonese and 1 Vietnamese business) and they have a 20 cent feed in tariff. One third of the Mandarin businesses have been offered solar PV and one quarter of the Greek businesses have been offered PV alone and PV plus storage and one third of the Greek businesses have been offered an energy package.

Very few businesses have experienced an interruption to their gas supply although over 50% of Vietnamese, Mandarin and Cantonese speakers have experienced an interruption to their electricity supply. Not surprisingly, the more recent their arrival in Australia the more likely that they haven't experienced an interruption. This is a similar result to the 2011 – 12 research. Because there were so few interruptions to the gas supply, the reasons and the actions taken were too small to be analysed. The main two reasons for interruptions to electricity were a weather (storm/wind) event or workers. The majority of those that experienced interruptions to supply of electricity contacted the supplier except for the Vietnamese who mainly did nothing about the interruption although they all reported that the reason for the interruption was a weather event.

In this research 100% of Vietnamese business owners preferred to have information in their own language as did 67% of Mandarin speakers and 43% of Cantonese speakers. This was in contrast to the Greek and Assyrian business owners where 100% preferred Information in English. Tamil (17%) and Nepalese (48%) were the only business owners who wanted the information in English and their own language. In the BEST[26] project 82% of Vietnamese businesses preferred their own language. Half stated a preference for just their own language while another 24% were also OK with English. Cantonese (76%) and Mandarin (66%) speakers were more likely to prefer their own language.

The question about the form of the information was not asked in this research but was asked in the BEST evaluation pre-survey. The data showed that 65% of respondents chose written information and 40% face-to-face, email was not commonly mentioned and 74% preferred language specific communications.

[25] ECCNSW BEST 2015 op cit
[26] ibid

CONCLUSIONS

HOUSEHOLDS

There has been a change since the previous research in 2011-12 where the different language groups were divided into three according to their different length of time in Australia. This was based on similarities and differences when analysing the data which was only collected in NSW. The 2015-16 research data was collected in both Victoria and NSW and 4 groupings have been identified, as the newer arrivals have (average 5.5 years) more similarities with each other than those in the third group in the last research.

Group	Language spoken at home	Average length of time in Australia (years)
1	Greek	46
2	Vietnamese, Cantonese. Arabic	28
3	Arabic (Sudanese), Mandarin, Assyrian	13.4
4	Tamil, Nepali, Hazaragi	5.5

Except those who have been longest in Australia, 80% of the respondents knew who their supplier was or their tariff type. The majority of newly arrived migrants and refugees did not know their tariff type either. Similarly, the older migrants had taken little action to improve their energy efficiency.

100% of the Vietnamese and Arabic respondents chose their supplier but only 58% of the Cantonese. In Group 3 more than 73% chose their supplier and as expected in the newly arrived group, the Nepali speaking at 70%, Tamil at 36% and Hazaragi at 20% were the least likely.

Very few of the respondents (1 Arabic, 1 Assyrian and 2 Mandarin speakers) have received offers for the more advanced technology of storage or packages that include both PV and storage. When asked who they would contact if the technology failed to function very few (20% or less) knew. Except for the Nepali speakers, those longest in Australia were more likely to answer that they would contact the supplier.

In this research respondents were asked about their knowledge of payment assistance. Many knew about the opportunity for assistance however very few had used it although CALD people are over represented in the two lowest income groups.

Change over time

In the 2011-12 research the respondents in Group 1 were less likely to be aware of energy use and efficiency. In the present research the knowledge of this group has increased particularly about meters but not tariffs (82% did not know their tariff type). Also 75% of this group chose their supplier of energy in comparison to 53% in the earlier survey. Surprisingly only a third of Group 2 knew about their type of meter and two thirds knew their tariff type. Group 3 had similar result for tariff type and a greater number who knew their meter type. However, similar to the earlier research those with the shortest length of time in Australia were the least knowledgeable about energy supply such as the meter and tariff type. About one third of the 4 groups knew how a meter works.

The knowledge for all groups has improved during the years between the implementation of the research. For example, knowledge of supplier and meter has increased. In 2015-16 research over 80% knew their supplier and in 2011-12 only 70%. A bigger change is in knowledge of meter type and how it works, which was 3% and zero respectively for the earlier research but now an average of 40% know what type of meter they have and an average of 24% know how their meter works.

Knowledge about energy efficiency was similar for all of the language groups although the reason for taking action changed, particularly the numbers reporting the reason for change as 'costs and the environment'. This is a change from the earlier research, where 'cost saving' was the main reason and this ranged from 80 – 100%.

In the earlier ECC research, there was a higher overall number of respondents that were happy with their current supplier so this has dropped over the last four to five years. Another change is the that the length of time in Australia is no longer significant in whether interruptions to electricity supply are experienced. The migrants that have been in Australia longest have become more active in contacting the supplier in response to an interruption of supply since 2015[27].

The preference for bill delivery was predominantly by mail by all groups but the numbers preferring to pay at the Post Office has decreased since the 2011-12 survey.[28]

Differences between States

There are some interesting differences between the two States' energy consumers.

The Arabic speaking Sudanese in Victoria (100%) knew their metering type but none of them knew how it worked and in NSW the all of Arabic speaking respondents had no knowledge of their metering type or how it worked. It was surprising that Arabic speaking Sudanese, Mandarin and Nepali speakers in Victoria were much less likely to know their tariff type than their NSW counterparts.

The Arabic speaking Sudanese, Nepali and Mandarin speakers were more likely **not** to choose their energy supplier or **not** to know their supplier in Victoria than in NSW.

The majority of respondents from Group 1 and 2 (except the Vietnamese) as well as the Mandarin speaking Chinese and Nepalese found their bills easy to understand whereas the rest of the respondents, all more recently arrived, had greater difficulty. The Vietnamese and Tamil respondents were least likely to look at their bills. This result was similar for both States. Also there was very little difference between States in responses to either payment method or delivery of the bill.

Approximately 10% of respondents in NSW and 5.5% of Victorians had solar PV.

When questioned about their experiences of an interruption of service there was no difference between States for electricity and no differences in interruptions in gas supply.

Most Victorian Nepali speakers and all Arabic speaking Sudanese wanted the information to be in their own language whereas in NSW it was the opposite. Of those who wanted information in Mandarin (45%) only, 70% were Victorian. This was less likely in the Mandarin speakers in NSW.

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[27] ECC 2012 op cit

[28] ibid

Comparison with Newgate research

The AEMC contracts Newgate Research [29] to review competition in the National Energy Market on a regular basis. The research is conducted by survey using telephone and online. Although the questions are not identical some questions are sufficiently similar to compare the results with this research.

When asked a direct question about changing retailer in the last 12 months very few respondents had made a change except for Tamil speakers where 64% had changed (note that the Tamil speaking respondents are also the most dissatisfied with their supplier). Newgate's [30] research identified that 25% of energy consumers had changed supplier in the last 12 months. In this research Assyrians and Arabic speaking respondents had changed more often at an average of 40% and 30% respectively. The rest of the respondents were well below this percentage average with no Vietnamese, 6% Mandarin, 9% Sudanese and 10% Hazaragi speaking consumers changing retailer in the last 12 months.

Of those that changed retailer more than 50% gave the main prompted reason for the change as a cheaper rate although this was often accompanied by other reasons such as recommendations by friends/relatives or telephone or door-to-door marketing by retailers. 27% cited a change of premises was the reason. Reasons for not changing included *did not understand offer (15%), not a better deal (46%) or loyalty to the company (25%)*. These results are similar to those reported by Newgate [31] where 10% stating *too confusing,* 43% *lack of value in change* and *29% happy with current supplier.* As expected a higher number of CALD consumers did not understand the offer.

BUSINESSES

Change over time

The research in 2011-12 interviewed 30 small to medium sized ethno-specific businesses in NSW only and this research visited 83 businesses in both NSW and Victoria.

In 2011-12 research less than 50% had chosen their electricity supplier however the majority chose their gas supplier. In the present research the majority had chosen their electricity and gas supplier. The main reason for their choice in the earlier research was costs or discounts and again this was the main reason in the 2015-16 research except for the Cantonese who when choosing gas reported that friends and family were the main reason for their choice.

The earlier research found that about 50% of businesses in NSW had been visited by a retailer about changing and the majority had decided not to change. The 2015-16 research found that when asked if they had contact from the energy supplier regarding a change, 59% they had been contacted about electricity and 33% about changing gas supplier. The highest were the Vietnamese businesses where all had been contacted in contrast to the Assyrian businesses where none had been contacted. The majority did not change supplier. When asked whether respondents had contacted the suppliers to question their bill or discuss contracts there was differences between businesses with almost 50% questioning the bill and only 25% discussing contracts or charges. The previous ECC

[29] Newgate 2015 op cit

[30] ibid

[31] ibid

research showed that two thirds of businesses had not contacted the supplier to negotiate a contract.

Differences between States

As expected there were more businesses in Victoria with dual fuel (56%) than in NSW (34%). None of the businesses in Victoria had solar hot water or solar PV.

The type of fuel does not account for the different energy costs in beauty shops and takeaways in the different States. Only 33% per cent of beauty shops in Victoria were dual fuel and none in NSW and the cost of energy in the all-electric NSW beauty shops was a third of the cost of beauty shops in Victoria even though the staff (or size of business) was twice the size of the Victorian beauty shops. Whereas takeaways in Victoria were all dual fuel and only 75% were dual fuel in NSW, the average of costs of fuel were almost the same and the staff numbers were similar. All similar businesses in both States have a similar $ per quarter costs with the exception of 2 bakeries in NSW and one restaurant in Victoria ($9,500 per quarter). As this restaurant had only 3 staff it could be interpreted as being mistaken for an annual bill and when converted to a quarterly bill is similar to the other dual fuel restaurants in both NSW and Victoria.

97 - 96% of businesses knew their electricity supplier in NSW and Victoria whereas in Victoria 95% knew their gas supplier. Only 80% of those with a gas connection in NSW knew their gas supplier. The ECC 2015-16 research found that about 50% knew the type of meter in both States. When asked if they knew how the meter worked (not asked in Newgate research) 33% said they knew how it worked. The ECC research showed that 22% of NSW and 50% of Victorian businesses knew how the meter worked. It would appear that half of ethno-specific businesses in Victoria both know what meter they have and also 50% know how it works.

In NSW there was limited knowledge of other charges and where a charge was identified it was commonly a daily supply charge. In Victoria there was no knowledge of any additional charges.

Many of the businesses (22%) did not know their tariff type and this was highest in convenience stores and small groceries and with the Greek (67%) and Mandarin (50%) speakers. The majority of the Assyrians knew they were on a TOU tariff and neither of the Greek speakers knew, both Victorian. The majority of Vietnamese (NSW based) were on a flat tariff (50%) with only 10% that did not know. Those who knew they were on a flat rate were 24% in both States and those that knew they were on a TOU were different in each state, 58% in NSW and 48% in Victoria. Those that didn't know were 18% in NSW and 27% in Victoria.

Most business in both States were confident they could identify the appliances that used the most energy and 88% in both States took action for different reasons. The reason for not taking action included lack of time and resources, coupled with staff training/unwillingness to change and cost/risk although there were only a small number in each State. In Victoria the most common reason was that they were unsure what to do and did not own the premises.

This research found that the reasons for changing supplier in NSW (about 16%) and significantly less in Victoria were cheaper prices and discounts. The reasons for not changing supplier (69% in NSW and 75% in Victoria) were that '*they didn't think it was a better deal*' and 22% and 14% stated '*loyalty to supplier*' as the reason, 9% and 7% said they '*did not understand the offer*'.

When asked if the respondents had contacted the suppliers to question their bill almost 100% of the Assyrian, Nepali, Arabic and Tamil speaking businesses reported that they had, but none of the Greek, Mandarin and Vietnamese speaking businesses had done so. In comparison high numbers of

Greek and 100% of the Mandarin speaking businesses had discussed contracts and charges with suppliers. The Vietnamese had neither questioned their bill or discussed contracts and charges with suppliers. The differences between the different language businesses was greater than any differences between States.

Not surprisingly, the more recent their arrival in Australia the more likely that they haven't experienced an interruption. This is a similar result to the 2011 – 12 research.

Comparison with Newgate research

Newgate's research [32] surveyed 100 businesses in each State and found 15% of small to medium sized businesses had PV in NSW and 12% in Victoria. This research found the numbers considerably lower.

When asked about their metering type, 49% of the language groups knew what type of meter they had in comparison to 31% NEM wide respondents who said they knew that they had a smart/interval meter. Not surprising Newgate found that percentage to be 74% in Victoria and only 14% in NSW.[33]

This research found that 54% of businesses stated that they had a time of use (TOU) tariff. In NSW it was 59% and 48% in Victoria. Newgate research found that 39% of interviewees across Australia said they were on TOU tariff, 39% in NSW and 49% in Victoria. [34]

The number of businesses who had changed supplier when asked a direct question was 19%, a similar result to Newgate research. However, there were differences between language groups.

Newgate found that 48% in NSW and 71% in Victoria had been contacted to change supplier of electricity in the last 12 months. The ECC found little difference between States. Newgate found that the most often selected reasons given for changing were '*cheaper prices and discounts'* in NSW and Victoria. This research found similar reasons for changing supplier in NSW (about 16%) and significantly less in Victoria. The most common reason given for not changing in Newgate research was '*too busy/lack of time'* in both States and a similar number said they did not understand or in Newgate's words it was *'too confusing'*. Only a very few of the respondents in both States had changed their tariff type.

BEST similarities and differences

This research found that 22% of businesses did not know their tariff type The ECC's 2014-5 BEST project found that 51% of ethno-specific businesses did not know their tariff type.

Overall 29% of the businesses had received information (similar to BEST results where 63% could not recall receiving information [35] about energy efficiency and 88% took action in both States for different reasons.

Fifty-four percent said they found the electricity bill easy to understand (similar to the BEST project[36] results and 28% said it was either a bit or very difficult (26% said it was difficult in BEST pre-project) and 18% were unsure or didn't look at their bill (15% in BEST did not look at bill).

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[32] Newgate 2015 op cit

[33] ibid page 353

[34] ibid

[35] ECCNSW BEST 2015 op cit

In this research 100% of the Vietnamese business owners preferred to have information in their own language as did 67% of Mandarin speakers and 43% of Cantonese speakers. This was in contrast to the Greek and Assyrian business owners where 100% preferred Information in English. Tamil (17%) and Nepalese (48%) were the only business owners who wanted the information in English and their own language. In the BEST[37] project 82% of Vietnamese businesses preferred their own language. Half of the business owners stated a preference for just their own language while another 24% were also OK with English. Cantonese (76%) and Mandarin (66%) speakers were more likely to prefer their own language.

The question about the form of the information was not asked in this research but was asked in the BEST evaluation pre-survey. The data showed that 65% of respondents chose written information and 40% face-to-face, email was not commonly mentioned and 74% preferred language specific communications.

IMPLICATIONS

The most outstanding feature of this research is the diversity of the respondents between language groups. This result reinforces the need for the guide for engaging consumers who speak a language other than English at home, ***Cultural Connections***, [38] prepared by the ECC for the energy industry and government agencies.

To participate the ECC needs to work with government agencies including energy departments in both the State and Federal governments to ensure that the energy literacy of CALD consumers, householders and business owners, and particularly the newly arrived, is improved. The majority of respondents knew their meter type but not how it works or what tariff type they have. The business owners knew the cost of energy for their business but very few of them knew their energy use in kWh. For example, the AER needs to promote the use of their comparator site, energymadeeasy as the respondents who knew about the site used it but the majority did know about the site.

The participation rates of the different language groups are diverse but a number of results point to a lack of engagement in negotiating contracts by householders. Their general understanding of the offers made by the industry is lower than that found by Newgate among energy consumers generally. Behavioural economics would argue that the complexity of information reduces the ability of consumers to make choices in their best interest. With CALD consumers the complexity is exponentially greater because of language difficulties in this specialist area of an essential service. That CALD consumers experience difficulties is reinforced by the results of this research. The majority of the respondents did not contact the retailers to negotiate a contract and their trust of energy suppliers has decreased over the 4 years between the two sets of research. The future work of the ECC will include working with the industry on strategies to overcome the identified issues.

What is interesting is that CALD consumers have not been widely approached by the new energy technology industry. For example, the Arabic speaking communities have not been approached with offers of PV or other packages. As a result, the number of CALD energy consumers with PV is lower in NSW and Victoria than that found in the Newgate research. Average domestic NSW and Victorian

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[36] ibid

[37] ibid

[38] ECCNSW, 2015, *Cultural Connections: Engaging CALD energy consumers*

ownership of solar PV is approximately 14%. [39] By comparison, the ECC research found 10% of CALD domestic consumers in NSW and 5.5% in Victoria had solar PV. A similar deficit in PV and solar hot water was identified in CALD business energy consumers where 2.4% had solar PV and 1 had solar hot water compared to the Newgate research which found 15% of the businesses interviewed had PV in NSW and 12% in Victoria.

Many CALD respondents knew about the options for payment assistance provided by different States but very few had used it. Our bilingual workers and other organisations' case workers have indicated that admitting to needing payment assistance is considered shameful by many of their clients. The ECC would like to do some additional research to ascertain the extent of this issue. This would be accomplished by interviewing case workers and settlement service workers to gain an understanding of the reality of what is happening in the communities. The Salvation Army LGERF statistics [40] indicate that in NSW 0.79% of the general population approached the service for payment assistance but only 0.09% of CALD consumers (ie only about 11% of what you might expect given CALD population statistics in NSW). The Census 2011 indicates that the CALD communities that were surveyed in this research are over represented in the lowest two income levels yet very few sought payment assistance for their energy bills.

[39] Australian PV Institute data, see http://pv-map.apvi.org.au/historical#11/-33.9451/151.0572

[40] Salvation Army 2016 op cit

Appendix A

Experiences of energy consumption for CALD communities (households)

Survey 2015

Code number _______

Type of energy used

1. Which type of energy do you use in your home? (Tick all that apply).

   Electricity ☐

   Gas ☐

   Solar hot water ☐

   Solar panels (PV) ☐

Choice of supplier

2A. Do you know who your electricity supplier is? Yes ☐ No ☐

If yes what is the name of your supplier ____________________

2B. Did you choose your electricity supplier? Yes ☐ No ☐ Don't know ☐

2C. If No, who chose your electricity supplier? ______________________________

2D. How satisfied are you with your electricity supplier on a scale 1 – 5 with

1 = very satisfied and 5 = not satisfied?

1 2 3 4 5

2E. Do you know who your gas supplier is? Yes ☐ No ☐

If yes what is the name of your supplier _________________

2F. Did you choose your gas supplier? Yes ☐ No ☐ Don't know ☐

2G. If No, who chose your gas supplier? ______________________________

2H. How satisfied are you with your supplier on a scale 1 – 5 with

1 = very satisfied and 5 = not satisfied?

1 2 3 4 5

Changing supplier

3. Have you been visited by or contacted by an energy retailer to change supplier?

Yes ☐ No ☐

Electricity

3A. Have you changed your electricity supplier in the last year? Yes ☐ No ☐

(if No, go to 3D)

3B. If yes, **why** did you change supplier? (*You can tick more than one box)*

a. Wanted a cheaper rate ☐

b. Was offered a discount or better price ☐

c. Was offered a good incentive ☐

d. Was approached by a door-to-door sales person ☐

e. Was approached over the phone ☐

f. Got a high energy bill and wanted to change ☐

g. Had a bad experience with the previous company ☐

h. Came to the end of my existing contract and wanted to change ☐

i. Moved house ☐

j. Moved out of home ☐

k. Unhappy with customer service ☐

l. Recommendation from a consumer organization ☐

m. Recommendation from family / friend ☐

n. Wanted to have gas and electricity with the same company ☐

o. Heard of a good comparison website ☐

p. Got a smart meter so moved to a time of use tariff (TOU) ☐

q. Got solar panels (solar PV) ☐

r. Got a solar hot water system ☐

s. Was transferred / switched without my consent ☐

t. Wanted Green Power ☐

u. My company was taken over or sold ☐

v. Received a series of higher than expected bills ☐

w. Dissatisfied with previous company (general) ☐

x. Was offered a good solar rebate ☐

y. Preferred their billing arrangements ☐

z. Other (specify) _______________________ ☐

Don't know ☐

3C. If you changed supplier did your energy costs decrease?

Yes ☐ No ☐ Don't know ☐

3D. If you didn't change supplier, why not?

a. Didn't understand the offer ☐

b. Didn't appear to be a better deal than we already had ☐

c. Loyal to my company ☐

d. Other____

____

Gas

4A. Have you got gas connected? Yes ☐ No ☐

(If No go to Question 5)

4B. Have you changed your gas supplier in the last year? Yes ☐ No ☐

(if No, go to 4G)

4C. If yes, **why** did you change supplier?

a. Wanted a cheaper rate ☐

b. Was offered a discount or better price ☐

c. Was offered a good incentive ☐

d. Was approached by a door-to-door sales person ☐

e. Was approached over the phone ☐

f. Got a high energy bill and wanted to change ☐

g. Had a bad experience with the previous company ☐

h. Came to the end of my existing contract and wanted to change ☐

i. Moved house ☐

j. Moved out of home ☐

k. Unhappy with customer service ☐

l. Recommendation from a consumer organization ☐

m. Recommendation from family / friend ☐

n. Wanted to have gas and electricity with the same company ☐

o. Heard of a good comparison website ☐

p. Got a solar hot water system ☐

q. Was transferred / switched without my consent ☐

r. My company was taken over of sold ☐

s. Received a series of higher than expected bills ☐

t. Dissatisfied with previous company (general) ☐

u. Preferred billing arrangements ☐

v. Other (specify) _______________________ ☐

w. Don't know ☐

4D. If you changed supplier did you negotiate a cheaper price? Yes ☐ No ☐

4E. Did you know you can negotiate a lower price? Yes ☐ No ☐

4F. If you changed supplier did your gas costs decrease? Yes ☐ No ☐ Don't know ☐

4G. If you didn't change supplier, why not?

a. Didn't understand the offer ☐

b. Didn't appear to be a better deal than we already had ☐

c. Loyal to my company ☐

d. Other____

____

Paying for energy

5. How do you pay your electricity /gas bills? (Tick all that apply)

a. By cheque ☐

b. Online ☐

c. By Credit Card ☐

d. By direct debit ☐

e. At the post office ☐

f. Payment made by Centrelink ☐

g. Other (Please state)____ ☐

Financial assistance

6. Are you aware that you can get financial help if you are having difficulties paying your bill?

Yes ☐ No ☐

6A. Have you ever used any of these or any other payment options? Yes ☐ No ☐

6B. If Yes, can you tell me what other payment options you have used? Yes ☐ No ☐

Payment option:____

Reliability of supply

7. Have you ever had problems (such as blackouts, interruption, disconnection) with your electricity supply ? Yes ☐ No ☐

7A. If yes, what caused the problem?

a. Storm/wind ☐

b. Fire ☐

c. Nonpayment of bill ☐

d. Work being done by electricity company ☐

e. Accidently by workmen ☐

7B. If you've had a problem, did you:

a. do nothing ☐

b. contact the supplier ☐

c. other (please state) ____ ☐

7C. Have you ever had problems (such as low pressure or flow, disconnection) with your gas supply? Yes ☐ No ☐

7D. If yes, what caused the problem?

a. Fire ☐

b. Non payment of bill ☐

c. Work being done by electricity company ☐

d. Accidently by workmen ☐

7E. If you've had a problem, did you:

a. do nothing ☐

b. contact the energy supplier ☐

c. other (please state) ____ ☐

Energy saving

8. Do you do anything at home to reduce or avoid using energy ? Yes ☐ No ☐

8A. If yes, what are your reasons?

Reduce cost ☐

Better for the environment? ☐

Other ____ ☐

8B. If Yes, what do you do? (*You can tick more than one box)*

a. Use energy efficient light globes ☐

b. Turn off appliances at the power point ☐

c. Turn off lights/appliances when not used ☐

d. Use fans, not air conditioner (summer) ☐

e. Don't use the dryer ☐

f. Switch off hot water at night ☐

g. Wear more/warmer clothes (winter) ☐

h. Shorter showers ☐

i. Buy appliances with more stars ☐

j. Install insulation ☐

k. Install solar panel ☐

l. Other____ ☐

8C. If No, why not?

Don't know what to do ☐

Don't really care ☐

Don't think it makes much difference ☐

Other____ ☐

8D. Do you have solar panels? Yes ☐ No ☐

If No, go to 8E

If Yes

a. Do you own your panels? Yes ☐ No ☐

b. Do you lease the panels? Yes ☐ No ☐

c. How much is your feed in tariff? *(circle the number closest to the cents per kilowatt what you receive)*

0 cents 5 cents 20 cents 40 cents 60 cents

8E. Have you been offered

a. Solar panels (PV) Yes ☐ No ☐

b. Storage (batteries) by an energy company Yes ☐ No ☐

c. A package to manage your energy supply that includes different technologies?

Yes ☐ No ☐

8F. Do you know who you would contact if these services or products failed to function or did not meet the promises made by the supplier? Yes ☐ No ☐

If yes, who would you contact?____

8G. Do you have a smart/advanced meter? Yes ☐ No ☐

8H. If yes, do you understand how a smart/advanced/interval meter works? Yes ☐ No ☐

Energy Costs and bills

9. Did you know about the Australian Government free website, Energy Made Easy designed to help energy consumers compare energy offers to get the right plan for you?

Yes ☐ No ☐

9A. If Yes have you used it? Yes ☐ No ☐

9B. How do you get your bills?

a. In the mail ☐

b. By email or online ☐

c. From a real estate agent ☐

d. From the owner of your property ☐

e. Other___________________________________ ☐

9C. Can you understand your electricity bill? For example: knowing how much electricity you have used, what the different charges are in the bill are, and the increases in rates charged. Is it….?

a. Very easy to understand ☐

b. OK to understand ☐

c. A bit difficult to understand ☐

d. Very difficult to understand ☐

e. Not sure ☐

f. I don't look at the bill ☐

Comments______________________________________

9D. Can you tell me if your electricity is charged at a flat rate or at different rates for different times of the day?

a. Flat rate ☐

b. Different rates for different times of the day ☐

c. Don't know/Unsure ☐

9E. In dealing with your electricity company, have you ever done any of these things?

a. Questioned the bill ☐

b. Changed the way your electricity is charged (e.g. between flat rate and time of day) ☐

c. Changed electricity company ☐

d. Discussed the extra charges in the contract (apart from actual use) ☐

e. Discussed the conditions of the contract ☐

If Yes go to Question 9G

9F. If you haven't done any of these things, was that because you…?

a. Haven't wanted or needed to do these things ☐

b. Have thought about it but haven't done it ☐

c. Didn't know you could ☐

d. Don't know how to do this ☐

e. Other reason____ ☐

9G. If you compare this year's energy bills with last year's bills, overall, are your yearly energy costs:

a. Rising ☐

b. Staying the same ☐

c. Going down ☐

d. Don't know ☐

9H. Why do you think this is?

a. Household has grown ☐

b. Have had airconditioning installed ☐

c. Prices have gone up ☐

d. Negotiated a better deal ☐

e. People are at home more often or longer ☐

f. Other reason______________________________________ ☐

____

Demographic details

10. Postcode ______________

11. Gender Male ☐ Female ☐

12. Age range 18-25/ 26-35/ 36-45/ 46-55/ 56-65/ 66-75/ over 76

13. Country born ___________________________

14. Year arrived in Australia _________________

15. Main language(s) spoken at home _________________

16. In what language would you prefer to receive information about energy costs and savings?

    ☐ English

    ☐ Other please state____

17. Type of dwelling

    ☐House ☐Flat/apartment ☐Townhouse ☐Other

18. Do you rent ☐ or own ☐ your property?

    If renting, is it from

    a. Real estate agent ☐
    b. Private ☐
    c. Social/public housing ☐

19. How many adult people live in your household? ____________________

20. How many children under 18 years live in your household? ___________

21. Is there anything else you'd like to add/or tell the ECC?

____

____

____

Appendix B

Experiences of energy consumption for CALD communities (businesses)

Survey 2015

Code number _______

Business type

1. What type of business is this?
   a. Restaurant ☐
   b. Butcher ☐
   c. Convenience store and small grocer ☐
   d. Bakery ☐
   e. Take away food outlet ☐
   f. Mechanic workshop ☐
   g. Beauty shop ☐
   h. Other____ ☐

1A. Do you own the business? Yes ☐ No ☐

1B. Do you manage the business? Yes ☐ No ☐

1C. Do you own the premises? Yes ☐ No ☐

1D. Do you lease the premises? Yes ☐ No ☐

1E. How long have you had this business? ____________________________________

Type of energy used

2. What type of energy do you use? (Tick all that apply)

   a. Electricity ☐
   b. Gas ☐
   c. Solar Hot Water ☐
   d. Solar panels (PV) ☐

Cost of energy

3. Do you know what is the cost ($) of your energy each quarter? Yes ☐ No ☐

3A. If Yes, what is the cost per quarter? $___________

3B. Do you know how many kWh do you use per quarter? Yes ☐ No ☐

3C. If Yes, how many KWh do you use per quarter? _________kWh

3C. Do you know if you pay a ‘capacity’ charge? Yes ☐ No ☐

Choice of supplier

Electricity

4. Do you know who your **electricity** supplier is? Yes ☐ No ☐

If Yes what is the name of your supplier ____________________

4A. Did you choose your electricity supplier? Yes ☐ No ☐

4B. If yes, why did you choose that supplier?

a. Cheaper ☐

b. Was offered a discount ☐

c. Was offered a good incentive ☐

d. Was approached by a door-to-door sales person ☐

e. Was approached over the phone ☐

f. Recommended by a consumer organization ☐

g. Recommended by family / friend/another business ☐

h. Wanted to have gas and electricity with the same company ☐

i. Heard of a good comparison website ☐

j. Got a smart meter so moved to a time of use tariff ☐

k. Got solar panels (solar PV) ☐

l. Got a solar hot water system ☐

m. Wanted Green Power ☐

4C. How satisfied are you with your electricity supplier on a scale 1 – 5 with

1 = very satisfied and 5 = not satisfied?

1 2 3 4 5

4E. Do you have a contract with your electricity supplier? Yes ☐ No ☐

4F. If yes, did you negotiate your contract? Yes ☐ No ☐

Gas

5. Do you know who your **gas** supplier is? Yes ☐ No ☐

If yes what is the name of your supplier _________________

5A. Did you choose your gas supplier? Yes ☐ No ☐

5B. If yes, why did you choose that supplier?

a. Cheaper ☐
b. Was offered a discount ☐
c. Was offered a good incentive ☐
d. Was approached by a door-to-door sales person ☐
e. Was approached over the phone ☐
f. Recommended by a consumer organization ☐
g. Recommended by family / friend/another business ☐
h. Wanted to have gas and electricity with the same company ☐
i. Heard of a good comparison website ☐
j. Got a solar hot water system ☐

5C. How satisfied are you with your supplier on a scale 1 – 5 with

1 = very satisfied and 5 = not satisfied?

1 2 3 4 5

5D. Do you have a contract with your supplier? Yes ☐ No ☐

5E. If yes, did you negotiate your contract? Yes ☐ No ☐

Changing supplier

6. Have you been visited by or contacted by an energy supplier to change supplier?

6A. Electricity Yes ☐ No ☐

6B. Gas Yes ☐ No ☐

6C. Did you change supplier Yes ☐ No ☐

6D. If Yes, why? (tick as many as apply)

x. Wanted a cheaper rate ☐

y. Was offered a discount or better price ☐

z. Was offered a good incentive ☐

aa. Was approached by a door-to-door sales person ☐

bb. Was approached over the phone ☐

cc. Got a high energy bill and wanted to change ☐

dd. Had a bad experience with the previous company ☐

ee. Came to the end of my existing contract and wanted to change ☐

ff. Moved business ☐

gg. Unhappy with customer service ☐

hh. Recommendation from a consumer organization ☐

ii. Recommendation from family / friend ☐

jj. Wanted to have gas and electricity with the same company ☐

kk. Heard of a good comparison website ☐

ll. Got a solar hot water system ☐

mm. Was transferred / switched without my consent ☐

nn. My company was taken over of sold ☐

oo. Received a series of higher than expected bills ☐

pp. Dissatisfied with previous company (general) ☐

qq. Preferred billing arrangements ☐

rr. Other (specify) ______________________ ☐

ss. Don't know ☐

6E. If No, why not?

e. Didn't understand the offer ☐

f. Didn't appear to be a better deal than we already had ☐

g. Loyal to my company ☐

h. Other____ ☐

6F. If you changed supplier did you negotiate a cheaper price? Yes ☐ No ☐

6G. Did you know you can negotiate a lower price? Yes ☐ No ☐

Appliance type and energy use

7. Which of your appliances/plant/equipment do you think uses the most energy?

a. Stoves ☐

b. Ovens ☐

c. Refrigerators ☐

d. Freezers ☐

e. Lighting ☐

f. Air-conditioning ☐

g. Hot water ☐

h. Boiler ☐

i. Other_____________________________

Energy saving

8. Have you ever been given **information** about how you can reduce your energy use in your business? Yes ☐ No ☐

8A. Where did this information come from?

- a. Local Council education session/workshop ☐
- b. Visit by Local Council officer ☐
- c. An Energy Audit or government program ☐
- d. Energy companies ☐
- e. Other businesses ☐
- f. Newspapers ☐
- g. Websites ☐
- h. Twitter ☐
- i. Facebook ☐
- j. Television ☐
- k. Radio ☐
- l. Face to face networking (friends, family, neighbours) ☐
- m. Equipment suppliers ☐
- n. Industry associations ☐
- o. Not sure/Don't remember ☐
- p. Other ____ ☐

8B. If Yes, how did this information help you?

- a. Made me aware of electricity costs in my business ☐
- b. Told me where my business used most electricity ☐
- c. Told me exactly what I could do to save electricity ☐
- d. Gave me information on the right suppliers/places to get equipment ☐
- e. Helped me work with my staff to do things differently to save electricity ☐
- f. Other____

8C. Do you do anything in your business to reduce your energy use? Yes ☐ No ☐

8D. If yes, why?

a. To save $$$ ☐

b. To save the environment ☐

c. To reduce climate change ☐

d. To make business more competitive ☐

8E. If yes, what do you do?

a. Buy energy efficient equipment ☐

b. Make changes to building such as insulation ☐

c. Switch off lights ☐

d. Switch of equipment when not in use ☐

e. Change temperature on refrigeration equipment ☐

f. Change temperature on air-conditioner ☐

g. Other _______________________________

8F. If no, why not?

a. Not sure what to do ☐

b. Lack of information and/or advice relevant to my business ☐

c. Lack of time/staff resources ☐

d. Lack of expertise in the business ☐

e. Cost up front ☐

f. Too difficult to get staff to make changes ☐

g. Risks involved with changes (e.g. interfering with product/service quality) ☐

h. Not sure about benefits ☐

i. Would make our business uncompetitive ☐

j. Don’t own our premises/landlord won’t make changes ☐

k. Other ____ ☐

8G. Do you have solar panels or other equipment to generate electricity on site?

Yes ☐ No ☐

8H. If you have solar panels

a. Do you own your panels? Yes ☐ No ☐

b. Do you lease the panels? Yes ☐ No ☐

c. How much is your feed in tariff? *(circle the number closest to the cents per kilowatt what you receive)*

0 cents 5 cents 20 cents 40 cents 60 cents

8I. Have you been offered:

a. Solar panels (PV) Yes ☐ No ☐

b. Storage (batteries) by an energy company Yes ☐ No ☐

c. A package to manage your energy supply that includes different technologies?

Yes ☐ No ☐

8I. Do you know who you would contact if these services or products failed to function or did not meet the promises made by the supplier? Yes ☐ No ☐

If yes, who would you contact?

____

8J. Do you have a smart/advanced/interval meter? Yes ☐ No ☐

8K. If yes, do you understand how a smart/advanced/interval meter works? Yes ☐ No ☐

Reliability of supply

9. Have you ever had problems (such as blackouts, disconnection, interruption) with your electricity supply ? Yes ☐ No ☐

9A. If yes, what was the problem?

a. Storm/wind ☐
b. Fire ☐
c. Nonpayment of bill ☐
d. Work being done by electricity company ☐
e. Accidently by workmen ☐

9B. If you've had a problem, what did you do?

a. do nothing ☐
b. contact the supplier ☐
c. other (please state)_____________________________________ ☐

9C. Have you ever had problems (such as low pressure or flow, disconnection) with your gas supply? Yes ☐ No ☐

9D. If yes, what caused the problem?

a. Fire ☐
b. Nonpayment of bill ☐
c. Work being done by electricity company ☐
d. Accidently by workmen ☐

9E. If you've had a problem, did you:

a. do nothing ☐
b. contact the supplier ☐
c. other (please state)___________________________ ___________ ☐

Energy costs

10. Can you understand your electricity bill? For example: knowing how much electricity you have used, what the different charges are in the bill are, and the increases in rates charged. Is it….?

a. Very easy to understand ☐

b. OK to understand ☐

c. A bit difficult to understand ☐

d. Very difficult to understand ☐

e. Not sure ☐

f. I don't look at the bill ☐

Comments_______________________________________

10A. Can you tell me if your electricity is charged at a flat rate or at different rates for different times of the day?

a. Flat rate ☐

b. Different rates for different times of the day ☐

c. Don't know/Unsure ☐

10B. Are you aware of any other charges that you pay on your bill? Yes ☐ No ☐

10C. Can you tell me what they are? ____________________________________

____

10D. In dealing with your electricity company, have you ever done any of these things?

a. Questioned the bill ☐

b. Changed the way your electricity is charged (e.g. between flat rate and time of day) ☐

c. Changed electricity company ☐

d. Discussed the extra charges in the contract (apart from actual use) ☐

e. Discussed the conditions of the contract ☐

10E. If you haven’t done any of these things, was that because you…?

a. Haven’t wanted or needed to do these things ☐

b. Have thought about it but haven’t done it ☐

c. Didn’t know you could ☐

d. Don’t know how to do this ☐

e. Other reason__________________________________ ☐

____

10F. If you compare this year’s energy bills with last year’s bills for your business, overall, are your yearly energy costs:

a. Rising ☐

b. Staying the same ☐

c. Going down ☐

10G. Why do you think this is?

____

____

____

10H. If energy costs are rising, what impact is this having on your business?

____

____

Demographic details

11. Postcode _______________

12. Gender Male ☐ Female☐

13. Age range 18-25/ 26-35/36-45/46-55/56-65/66-75/over 76

14. Country born _____________________________

15. Year arrived in Australia __________________

16. Main language(s) spoken at home __________________

17. In what language would you prefer to receive information about energy costs and savings?

    a. English ☐

    b. Other please state____ ☐

18. How many people do you employ? _____________________

19. Is there anything else you'd like to add/or tell the ECC?

____

____

____