



SME Survey Phase 4

Powercor

September 2019

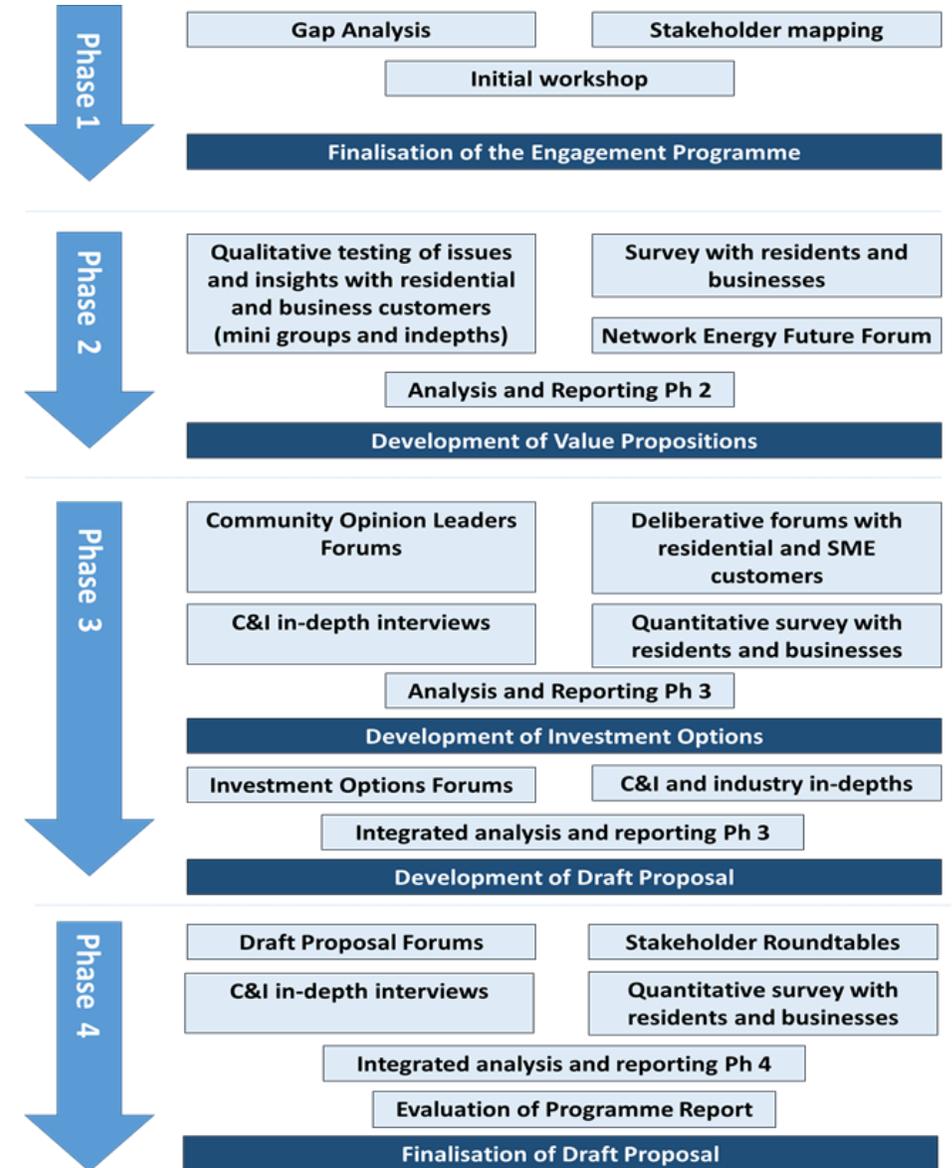


TABLE OF CONTENTS

APPROACH	3
SUMMARY OF FINDINGS	6
DISTRIBUTOR PERCEPTIONS	13
IMPROVING CUSTOMER SERVICE	17
ACCESS TO REAL TIME DATA	24
SOLAR ENABLEMENT	27
DIGITAL & RESILIENT NETWORK	34
AFFORDABLE NETWORK	40
OVERALL PACKAGE FOR 2021-2026	44
DEMOGRAPHICS	48

BACKGROUND AND CONTEXT

- Powercor is required to provide a regulatory proposal to the AER every five years, detailing its predicted expenditure and revenue requirements over the regulatory period.
- Powercor is currently developing its regulatory proposal to the AER for the 2021-2026 regulatory period.
- To help shape this regulatory proposal, Powercor is keen to further understand customer priorities, how they see the future, and to assess the Draft Plan.
- Woolcott Research and Engagement has been commissioned to conduct customer and stakeholder engagement to input into the preparation of the regulatory proposal.
- The business developed the Energised 2021-2026 program which includes four phases of customer and stakeholder engagement. We are currently in Phase 4.
- The aims of this phase are to investigate key issues for the network in more detail and fine tune the proposals for the Draft Plan.



METHODOLOGY

- The objective of the current survey was to test which options customers preferred in the context of the total bill impact. Although respondents were asked for their choices for each question, and then had a chance to change these choices in the context of the whole bill impact, the results shown in this report are their 'final' answers in the context of the bill impact.
- The survey was conducted online and n=200 completes were obtained from SME customers.
- The respondents were sourced through an online SME panel, used solely for research purposes.
- The survey was live from 23/08/2019 to 13/09/2019.
- Data was weighted during the analysis by size of business to reflect the Powercor area.
- Significance testing has been carried out at the 95% confidence interval. Results are shown in **bold green** where significantly higher and **bold red** where significantly lower than the total.

- Note that due to rounding, percentages may not always add to 100

The survey covered the following areas:

- Knowledge and literacy
- Communication and customer service
- Access to real time data
- Solar enablement
- Digital network
- Resilient network
- Overall package
- Affordable network
- Demographics

KEY FINDINGS

Distributor perceptions

- Most SME customers do not know the name of their electricity distributor (71%), with many confusing their retailer and distributor.
- When prompted, nearly two thirds of respondents are aware that the distributor's role is responding to electricity outages and maintaining poles and wires and just over half are aware of the roles of getting electricity to their business, and connecting to new businesses.
- Reliability of supply and maintaining affordability continue to be the two most important values.

Improving customer service

- While most had not contacted their electricity distributor via phone (76%), they think that no change is needed to the speed of answering calls (72%).
- Text messages are preferred to communicate unexpected outages and faults in the area, while email is preferred to communicate planned outages, consultations and other events.
- Satisfaction with current timeliness of communications around planned outages is high, however 15% of businesses that had experienced a planned outage indicate they are dissatisfied with the information provided.
- Continuing to remotely read smart meters is perceived to be important (61%).

KEY FINDINGS

Access to real time data

- There is some interest in using real time data to:
 - Monitor and adapt business behaviours (33%);
 - Checking the bill against the previous years usage (28%) and their last quarterly bill (27%); and,
 - Learning about how to save money (25%).
- While many are happy with current data provided, 41% are willing to pay extra for more timely data.

Solar enablement

- Less than half of respondents with solar installed say that they still would have done so if they could not export (47%). Fewer than one in five respondents who do not currently have solar say they would install solar if they could not export (18%).
- Saving money (86%) and environmental outcomes (52%) are key motivating factors to solar installation.
- 4 in 5 respondents believe that solar customers should be able to export back to the grid.
- Views are split amongst SMEs about who should pay the additional cost to ensure they are able to export. 39% believe that solar customers should pay with most thinking that only those solar customers who export should pay (27%). However, 34% believe all customers should pay.
- Two thirds of those who think the costs should be spread (68%) indicate a preference for improvement, with the majority of these favouring unlimited export.

KEY FINDINGS

Digital and resilient network

- 60% of SME respondents say there should be an investment in technology to improve at least reliability & safety, which is slightly higher amongst larger businesses.
- Powercor SME respondents are willing to pay for an increase in pole replacements of at least 2000 a year (55%), which is slightly higher amongst larger businesses.
- Nearly three quarters (74%) of Powercor SME respondents say they want to see a continuation of the undergrounding of poles, with almost half suggesting this should be speeded up to end in 2030.
- There is a willingness to pay (71%) to improve reliability in areas where REFCLs operate, with the largest proportion (44%) willing to pay for no outages.
- The majority of respondents (65%) are willing to pay \$0.55/year to help improve reliability in worst served areas.

Affordable network

- Only 37% of SME respondents say they are willing to change their electricity usage times with 28% indicating they are not very willing or unable to change.
- It is felt that 'time of use' pricing should be an 'opt in' system (41%), rather than opt out (24%).
- Nearly 2 in 5 of SME respondents (37%) are interested in shifting their usage if they receive a payment, with a further 7% interested dependant on the payment amount.

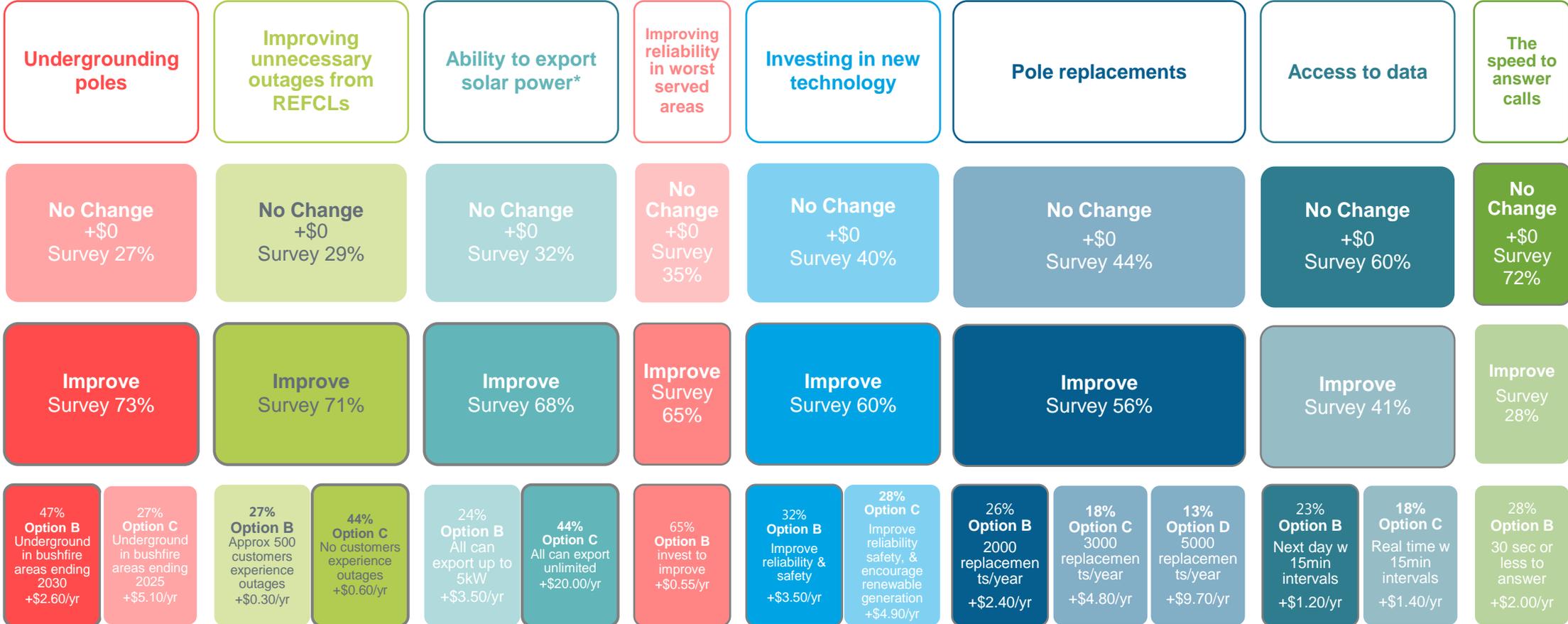
KEY FINDINGS

Overall package for 2021-2026

- When respondents were given the opportunity to look back over their choices in the context of the total bill impact, there were only slight changes made, the tendency being to choose options that involved paying more for improvements.
- Respondents are most willing to pay to see change in undergrounding poles and improving unnecessary outages from REFCLs.
- Overall, 16% of respondents are *not* willing to pay for any changes, with 56% of respondents willing to pay up to \$15.00 extra/year for improvements.
- On average, Powercor SME respondents are willing to pay an additional \$12.02 on their annual bill.

KEY FINDINGS

Payment preferences



* Note that only a sub-set of the sample were asked this question (those who believed that all customers should pay). However, the majority believed that solar customers should pay rather than all customers.

DETAILED FINDINGS



**DISTRIBUTOR
PERCEPTIONS**



ELECTRICITY DISTRIBUTOR | UNPROMPTED

Perceived name of electricity distributor Unprompted	Total 2019 (n=200) %	Sole Trader (n=131) %	1-4 Employees (n=43*) %	5-19 Employees (n=21*) %	20+ Employees (n=5*) %	Total 2018 (n=202) %
Powercor	29	29	30	24	40	45
AGL	3	1	7	10	-	4
Origin	9	8	12	14	-	8
Simply Energy	2	2	2	-	-	2
Energy Australia	5	7	5	-	-	2
United Energy	-	-	-	-	-	1
Lumo	1	-	2	-	-	1
Red Energy	1	1	-	5	-	1
Ausnet	1	2	-	-	-	1
Momentum Energy	-	-	-	-	-	1
None/Off Grid	1	-	2	-	-	1
Other	10	10	10	4	20	1
Don't Know	38	40	30	43	40	32

- Less than a third of SME respondents were aware that Powercor is their distributor.

Q4. Firstly, what is the name of the electricity distributor in your business's area? By distributor, we mean the company responsible for the electricity network not the energy retailer who sends your business the bill.

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

AWARENESS OF ROLES OF DISTRIBUTOR

Perceived roles	Total 2019 (n=200) %	Sole Trader (n=131) %	1-4 Employees (n=43*) %	5-19 Employees (n=21*) %	20+ Employees (n=5*) %	Total 2018 (n=202) %
Maintaining electricity poles and wires	66	62	72	71	80	73
Responding to electricity outages and interruptions	65	63	77	48	60	73
Getting electricity to your home	56	53	65	48	60	74
Connecting electricity to new businesses	55	53	65	43	20	65
Trimming vegetation around powerlines	48	48	56	29	20	60
Maintaining and operating street lighting	47	48	49	38	40	73
Long term planning to ensure a resilient electricity supply	47	53	42	29	40	52
None of the above	22	28	12	14	20	15

- Around two thirds of SME respondents were aware that the distributor is responsible for maintaining poles and wires, and responding to outages and interruptions.
- More than 1 in 5 were not aware of any distributor roles.

Q5. [insert distributor] is the electricity distributor for your business's area. Which of the following roles were you aware that [insert distributor] did before today?

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

RANKED IMPORTANCE OF BENEFITS/VALUES

	Total ranked 1 st (%)	Sole Trader ranked 1 st (%)	1-4 Employees ranked 1 st (%)*	5-19 Employees ranked 1 st (%)*	20+ Employees ranked 1 st (%)*	Index score
Providing a reliable supply of electricity	72	71	81	52	60	28
Maintaining affordability	16	16	14	19	40	20
Committed to providing a safe environment for customers and workers	3	2	2	19	0	12
Committed to providing a safe network that mitigates bushfire risks	2	2	2	0	0	11
Use electricity when you want or receive savings for reducing use	1	2	0	0	0	8
Keeping your data and our network secure	1	2	0	0	0	6
Making it easier for you to export solar and charge your battery	2	2	0	10	0	5
Making it easier for businesses to connect	0	1	0	0	0	5
Making it easier for your business to use its data to make informed choices	2	3	0	0	0	3

- Providing a reliable supply of electricity was overwhelmingly the most important value, followed by maintaining affordability.

Q6. As an electricity distributor, [insert distributor] ensures the safe and reliable supply of electricity, by maintaining poles and wires. [Insert distributor] is not an electricity retailer – they transport electricity to your business while retailers sell you the electricity. From the list below, please choose the five most important things when it comes to powering your business and rank them from one (1) most important to five (5) least important

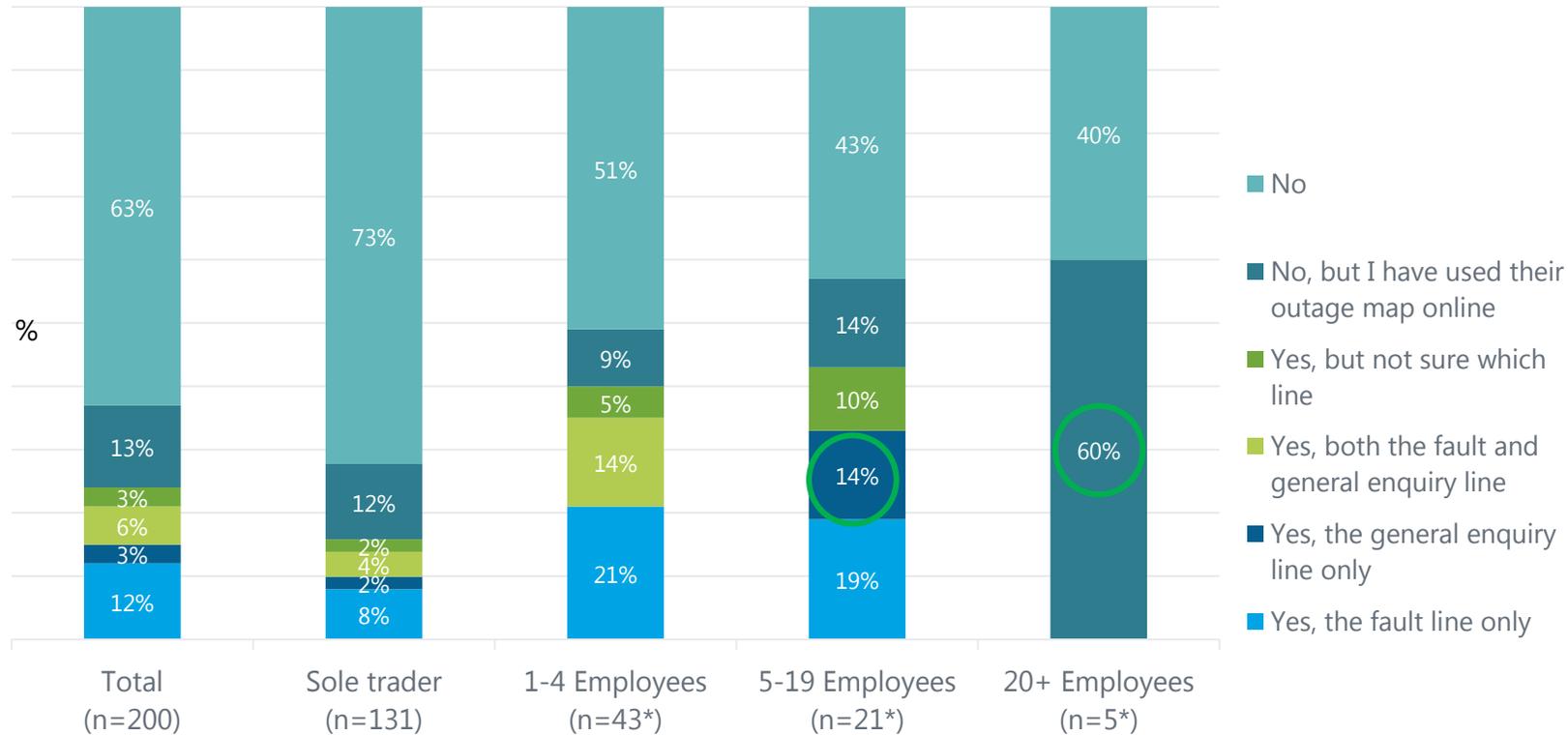
Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

The index score has been calculated by assigning a value of 5 points to the #1 ranking, 4 points to #2, 3 to #3, 2 to #4 and 1 point to #5 and then adding them together. This score was then indexed to be out of 100.

IMPROVING CUSTOMER SERVICE



INCIDENCE OF HAVING CONTACTED DISTRIBUTOR



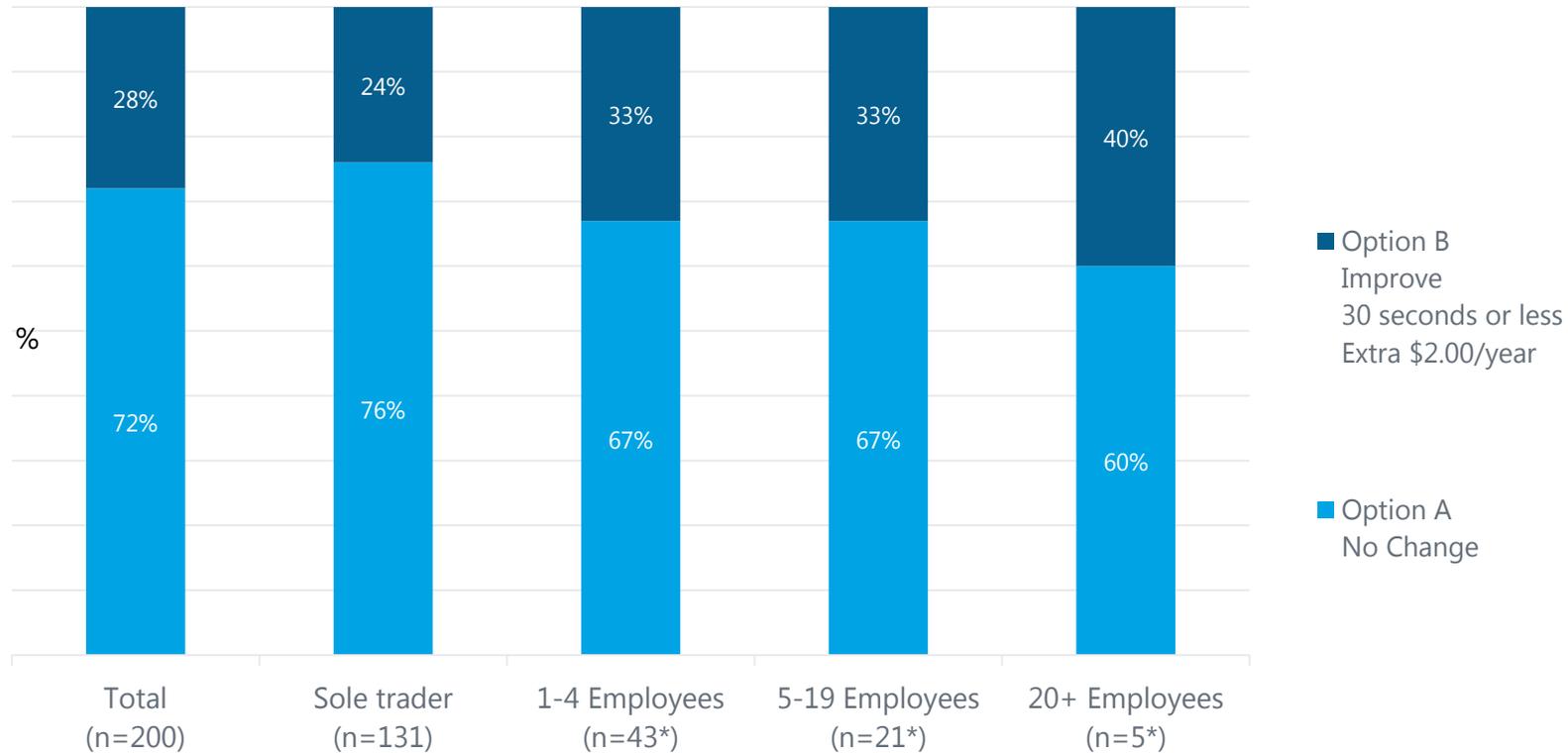
- Just over three quarters of SMEs had not called the distributor. This varied slightly by business size.

Q8. Customer service is very important to [the distributor]. [Distributor] currently provides two manned call lines: a fault line and a general enquiry line. [Distributor] aims to answer calls to **the electricity fault line** within 30 seconds, while there is currently no standard response time for **the general enquiry line**.

Has your business previously called [the distributor's] fault or general enquiry lines?

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

IMPROVING SPEED OF ANSWERING CALLS

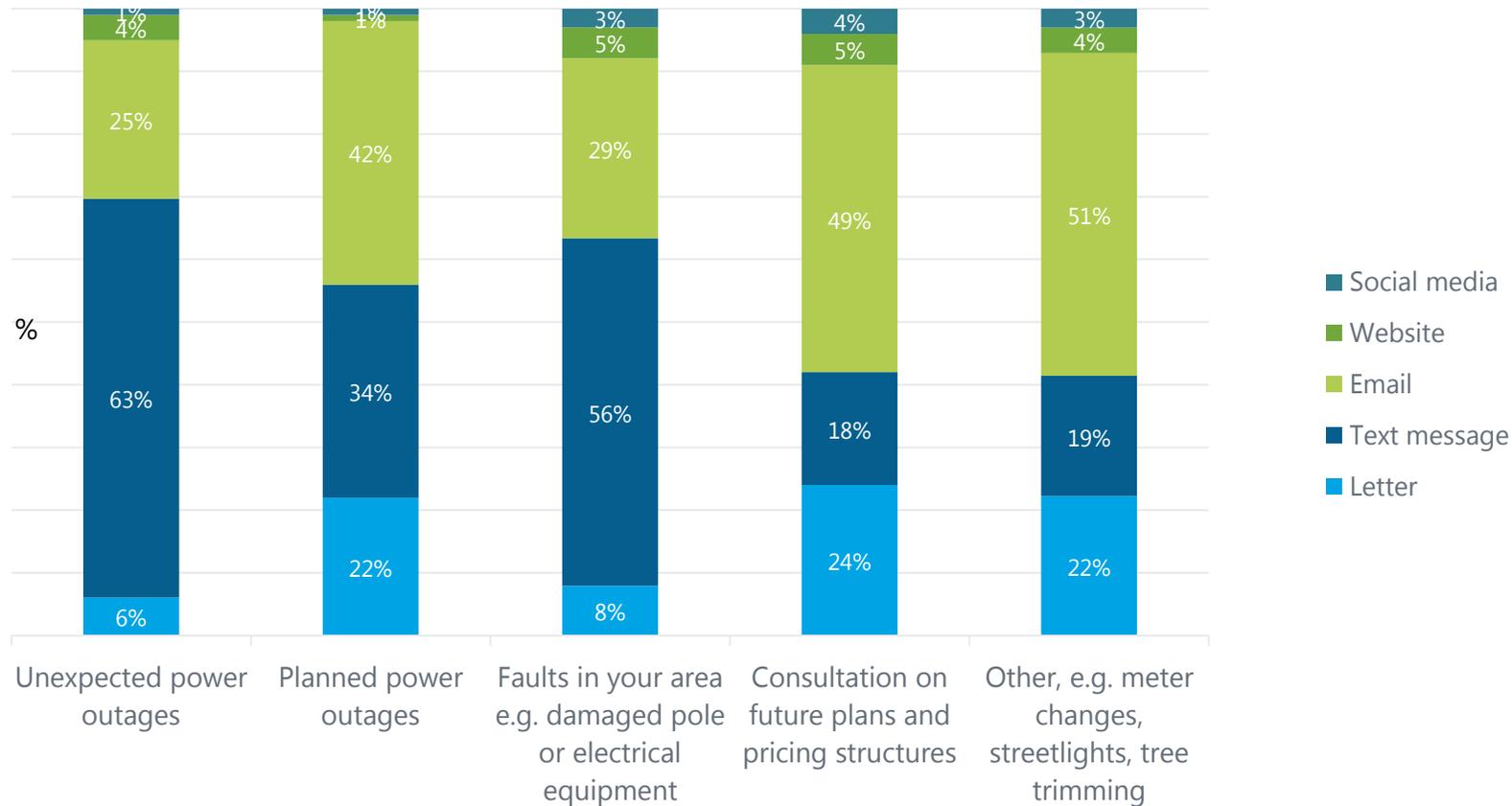


- Almost three quarters of businesses were happy to leave the length of time to answer calls on the general enquiry line at over 30 seconds, instead of paying an additional \$2 a year to improve answering times.

Q9. [the distributor] can ensure that calls to the general enquiry line are answered within 30 seconds as well, but this would cost a bit more. Which option would you prefer for the time taken for [insert distributor] to answer general enquiries (i.e. non-urgent calls)? *Answers provided after seeing full bill impact*

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

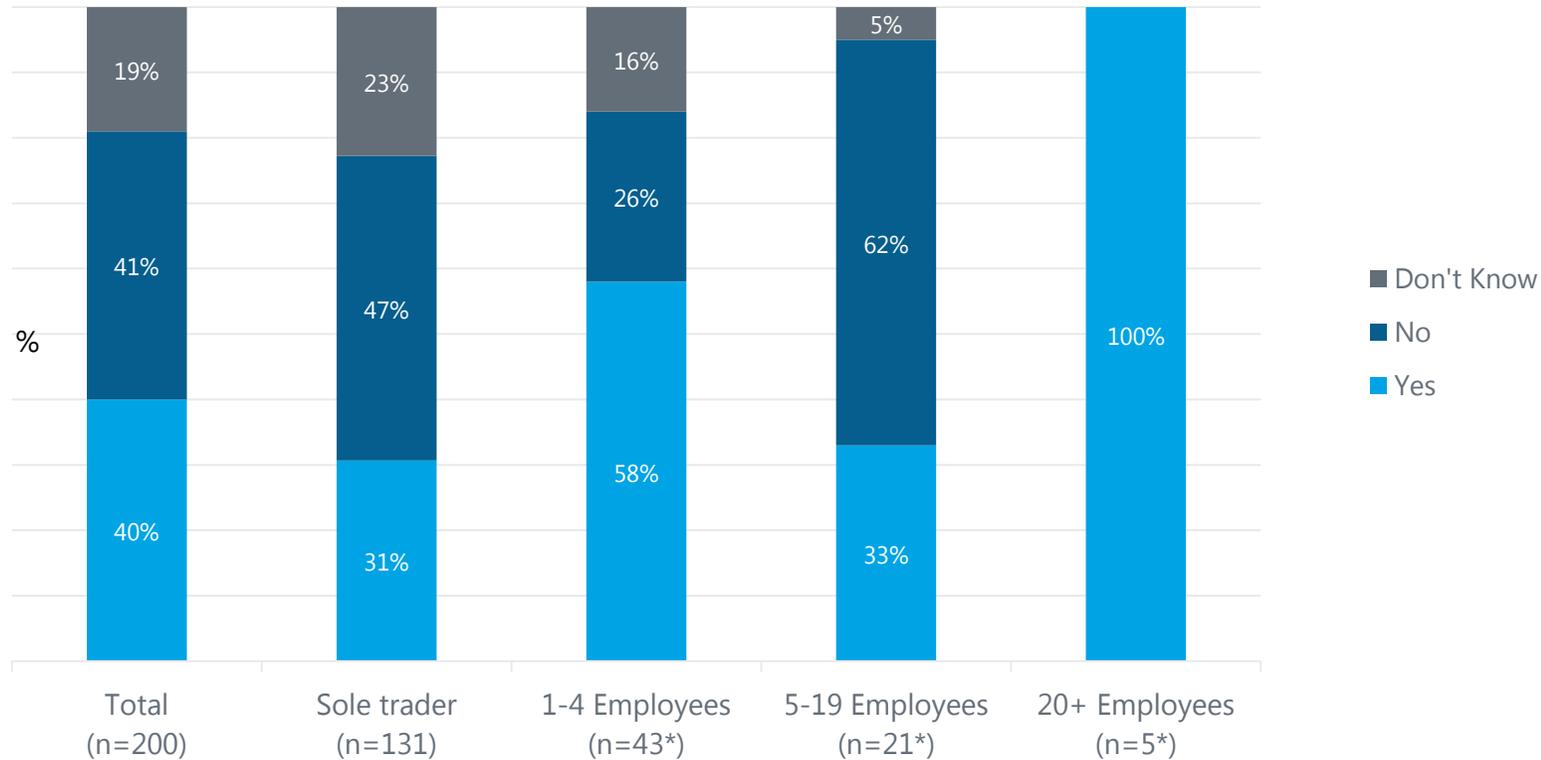
PREFERRED METHOD OF COMMUNICATION



- Text messages were preferred to communicate unexpected outages and faults in the area, while email was preferred to communicate planned outages, consultations and other events.

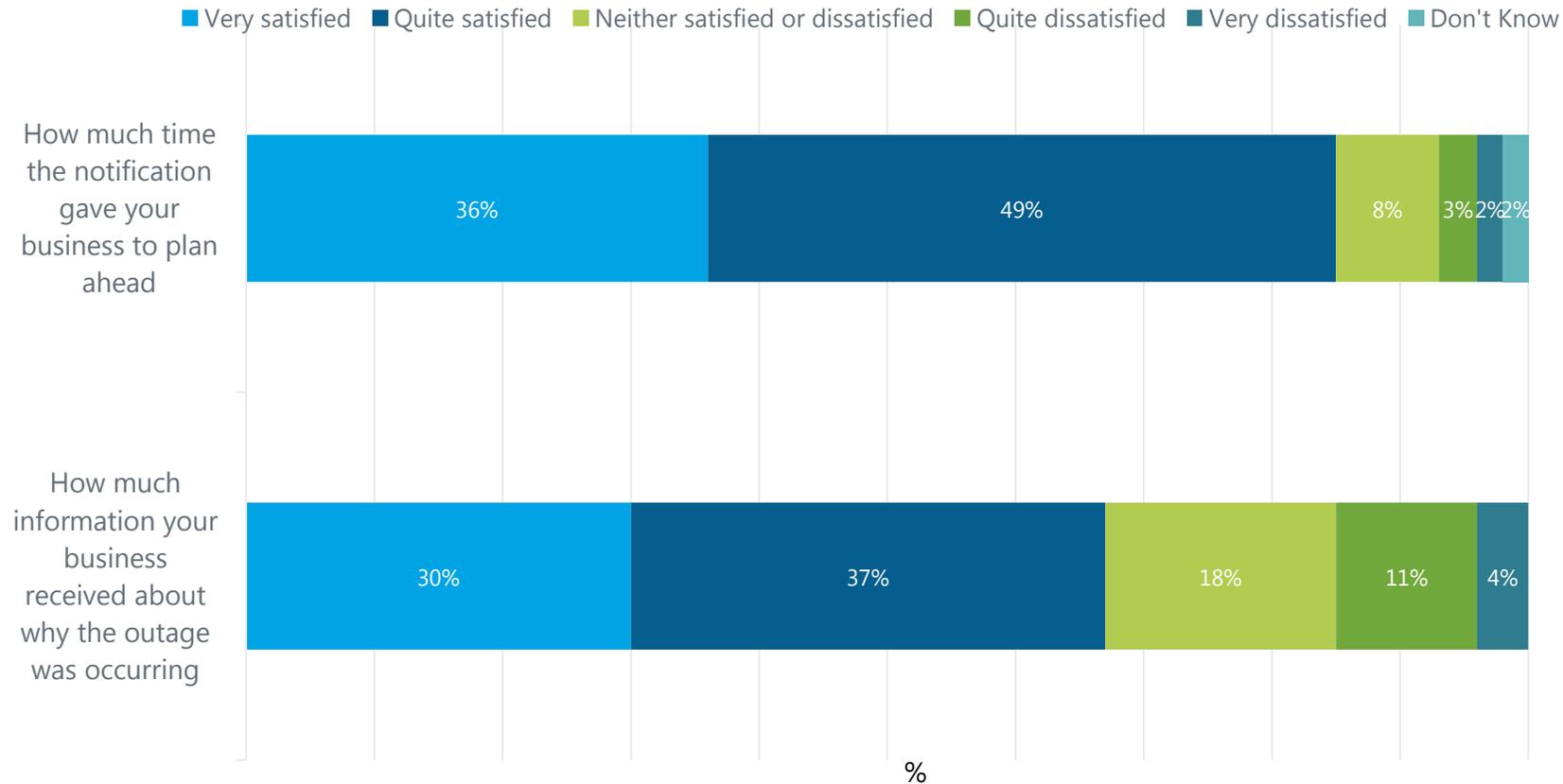
Q10. Which method of communication would you prefer [insert distributor] to use to communicate with you about the following
 Base: All respondents (n=200)

INCIDENCE OF NOTIFICATION OF A PLANNED OUTAGE



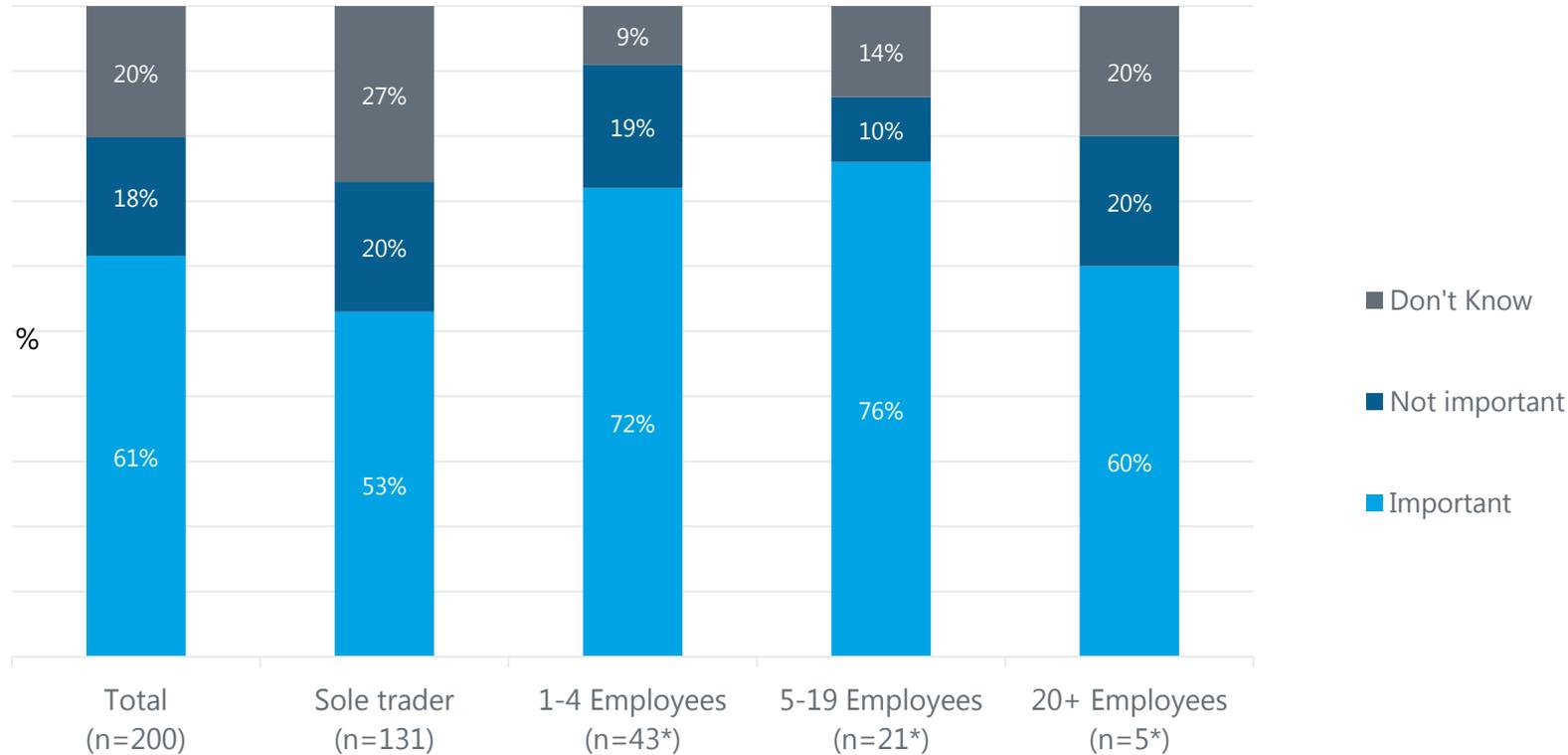
- There was mixed incidence across SMEs of having experienced a notification of a planned outage.

SATISFACTION WITH PLANNED OUTAGE COMMUNICATION



- Satisfaction with time given was high however there is some slight room to improve how much information the business receives (11% dissatisfied and 18% neither).

PERCEIVED IMPORTANCE OF REMOTELY READING SMART METERS



- 3 in 5 respondents indicated that it was important for Powercor to continue reading meters remotely.

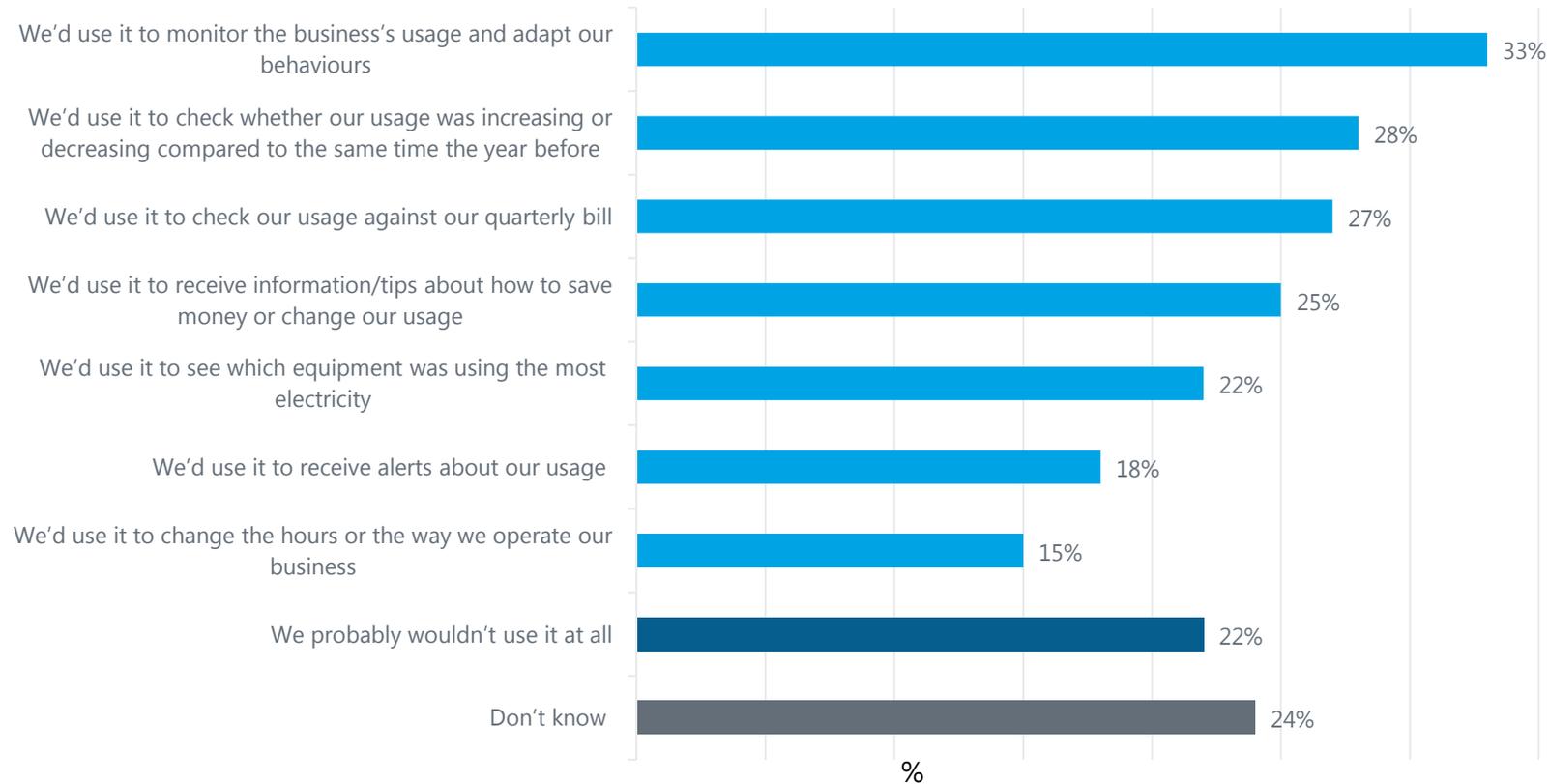
Q13. Almost all Victorian households have a smart meter installed. Smart meters allow [insert distributor] to remotely read your meter, or remotely turn-on and turn-off electricity at your business when you move. This means [the distributor] doesn't have to send someone to the property, making the process quicker and cheaper. How important is it to you that they continue to remotely read your meter and remotely turn your power on and off when you move?

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

ACCESS TO REAL TIME DATA



INTEREST IN ACCESS TO USAGE DATA



- Businesses were less likely than residents to say they would use their usage data.
- A third of businesses indicated they have an interest in using real time data to monitor and adapt the behaviours.
- There is also interest to check against previous years and quarterly bills, especially amongst businesses with 1-4 employees.
- Almost a quarter stated that they probably wouldn't use it at all.

Q14. [insert distributor] is considering giving customers access to their electricity usage data in near real-time (every 15-minutes) which would mean you could make on-the-spot decisions about your usage. It would also allow customers to more effectively participate in programs such as demand response where they can reduce their usage during certain times for a financial reward.

If your business had easy access to your usage data on a mobile phone app for example, how do you think your business would use it?

Base: All respondents (n=200)

PREFERENCE FOR ACCESS TO DATA



- 3 in 5 respondents wanted no change to their bills with provision of data the next day without 15 minute intervals.

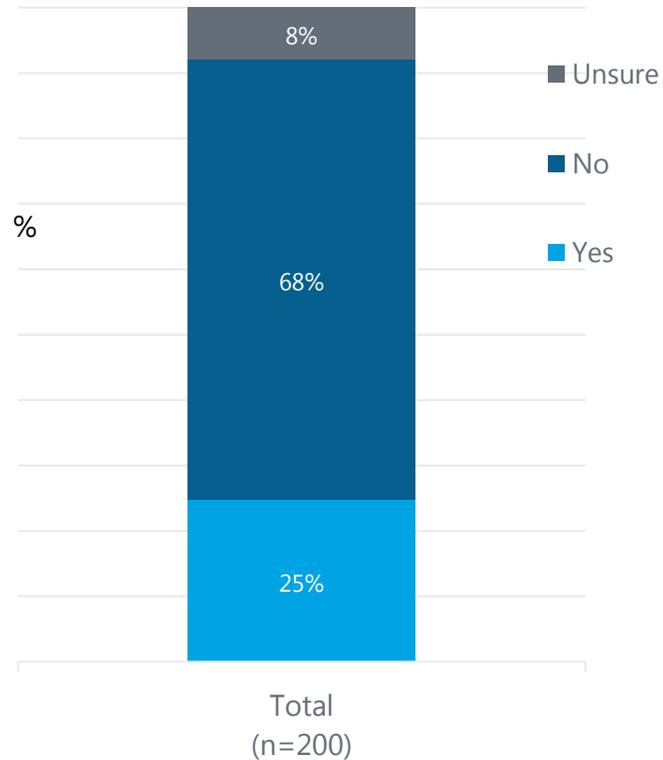
Q15. In terms of providing the data on your business's usage, which option would you prefer? *Answers provided after seeing full bill impact*
 Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

**SOLAR
ENABLEMENT**

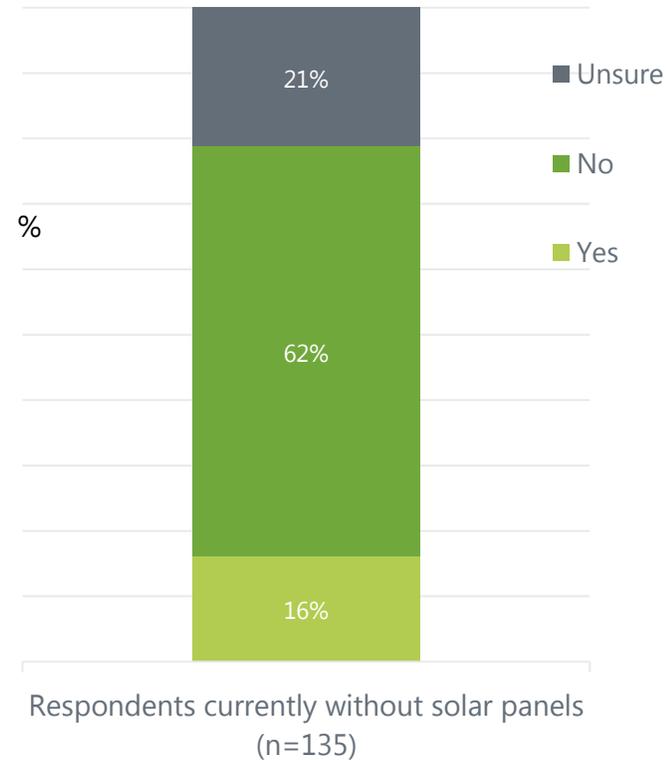


INCIDENCE OF & INTENTION TO GET SOLAR PANELS

Incidence of Solar Panels



Intention to install Solar Panels



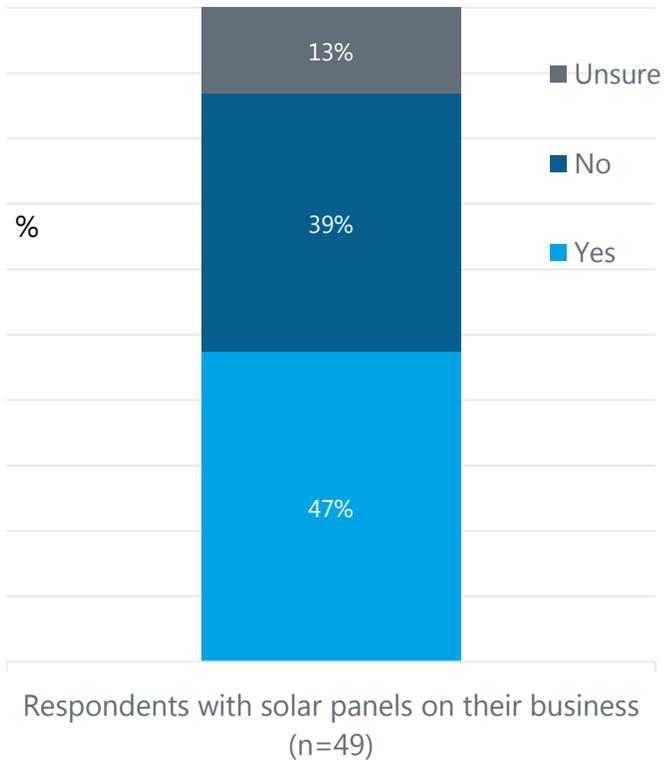
- Only a quarter of surveyed SMEs had solar panels, with a further 16% intending to install them in the next 2-5 years.

Q16. Does your business have solar panels?
Base: All respondents (n=200)

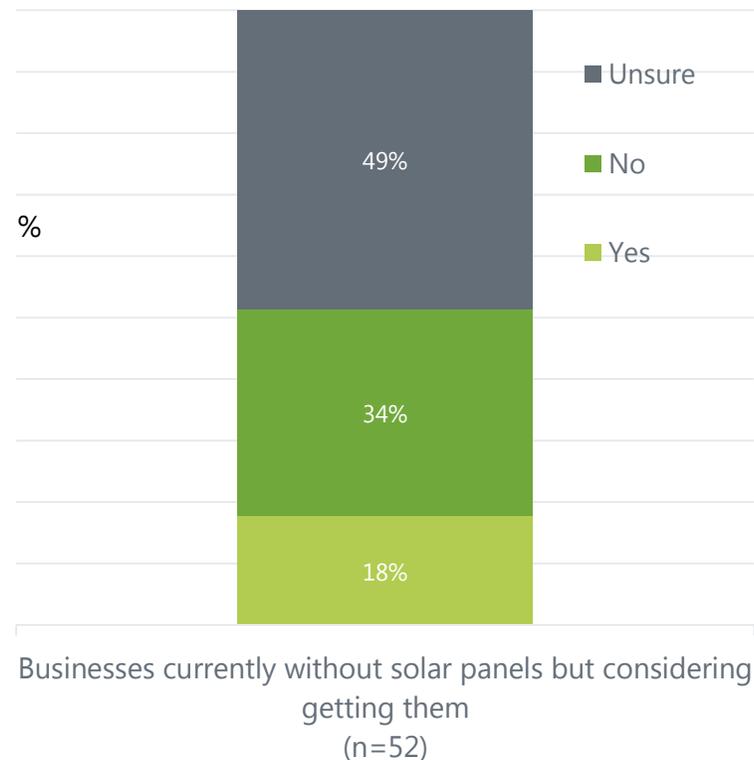
Q17. Is your business considering installing solar panels in the next 2-5 years?
Base: Respondents currently without solar panels (n=135)

IMPACT OF SELLING SOLAR ELECTRICITY

Impact amongst those with Solar Panels



Consideration amongst those without Solar Panels

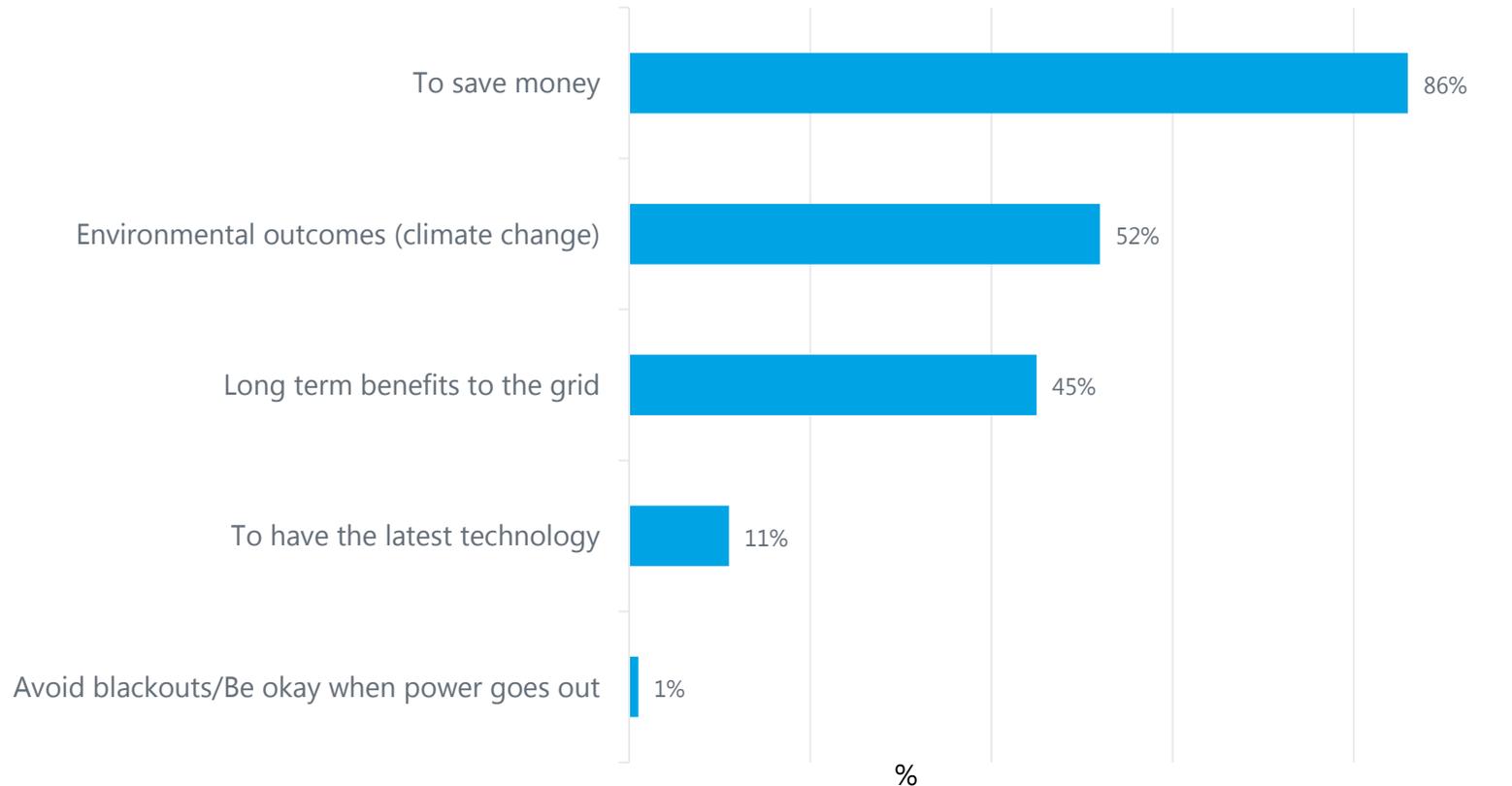


- Less than half of respondents with solar installed reported that they still would have done so if they could not export (47%).
- Only less than one in five respondents who do not currently have solar said they would install solar if they could not export (18%).

Q18. Would your business have decided to install solar panels if it could not export excess solar at all? *If the premises already had solar when you moved in then please answer as if your business had decided to install it.*
 Base: Respondents with solar panels installed on their business (n=49)

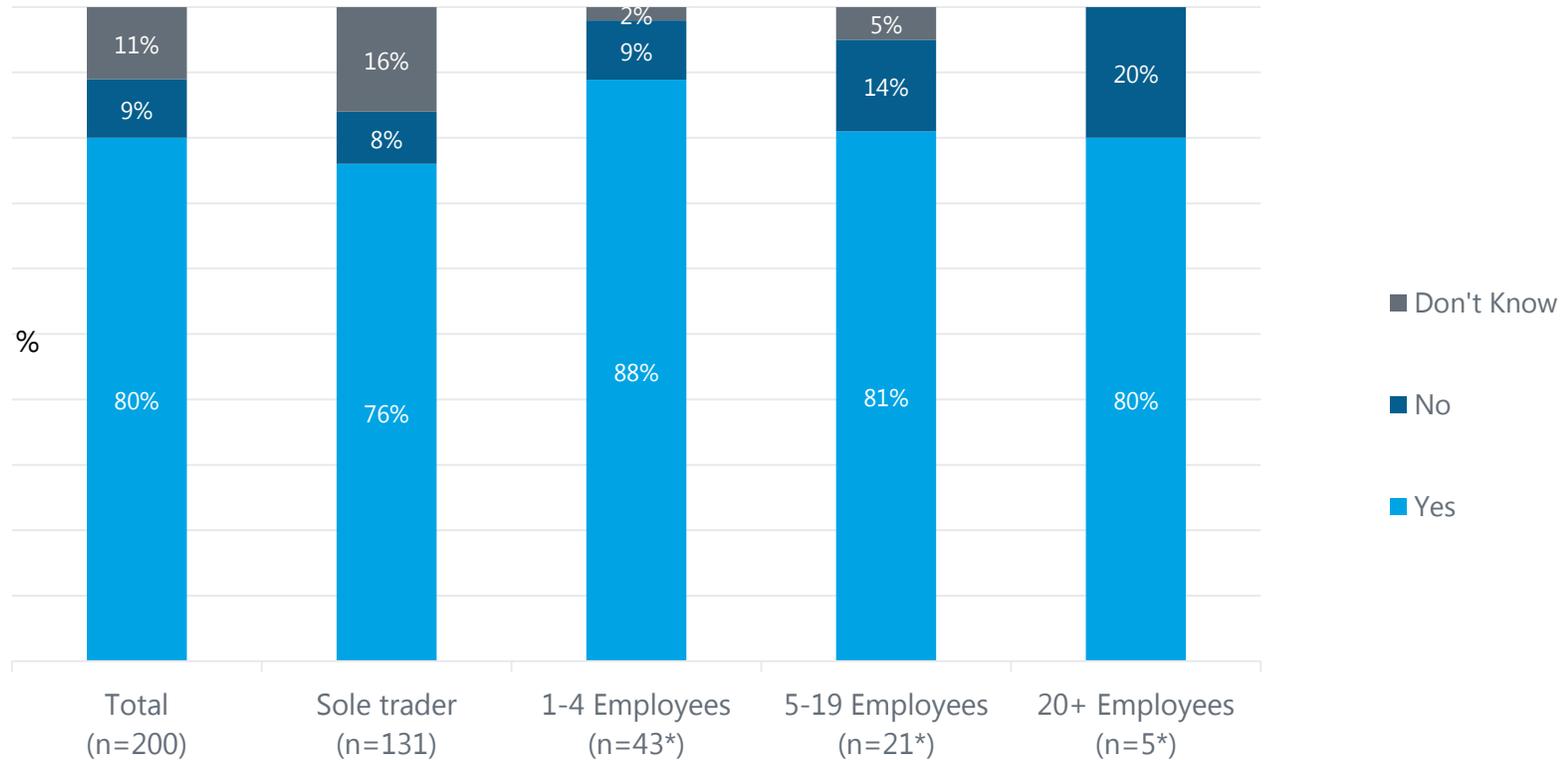
Q19. Would your business install solar panels if it could **not** sell spare electricity from the solar on to the network?
 Base: Respondents considering installing solar panels (n=52)

KEY MOTIVATORS TO INSTALL SOLAR PANELS



- The main motivator to install solar amongst SMEs is to save money.
- Around half of SMEs with or considering getting solar also indicated the environment and long term grid benefits as a motivating factor.

ABILITY TO EXPORT BACK TO THE GRID



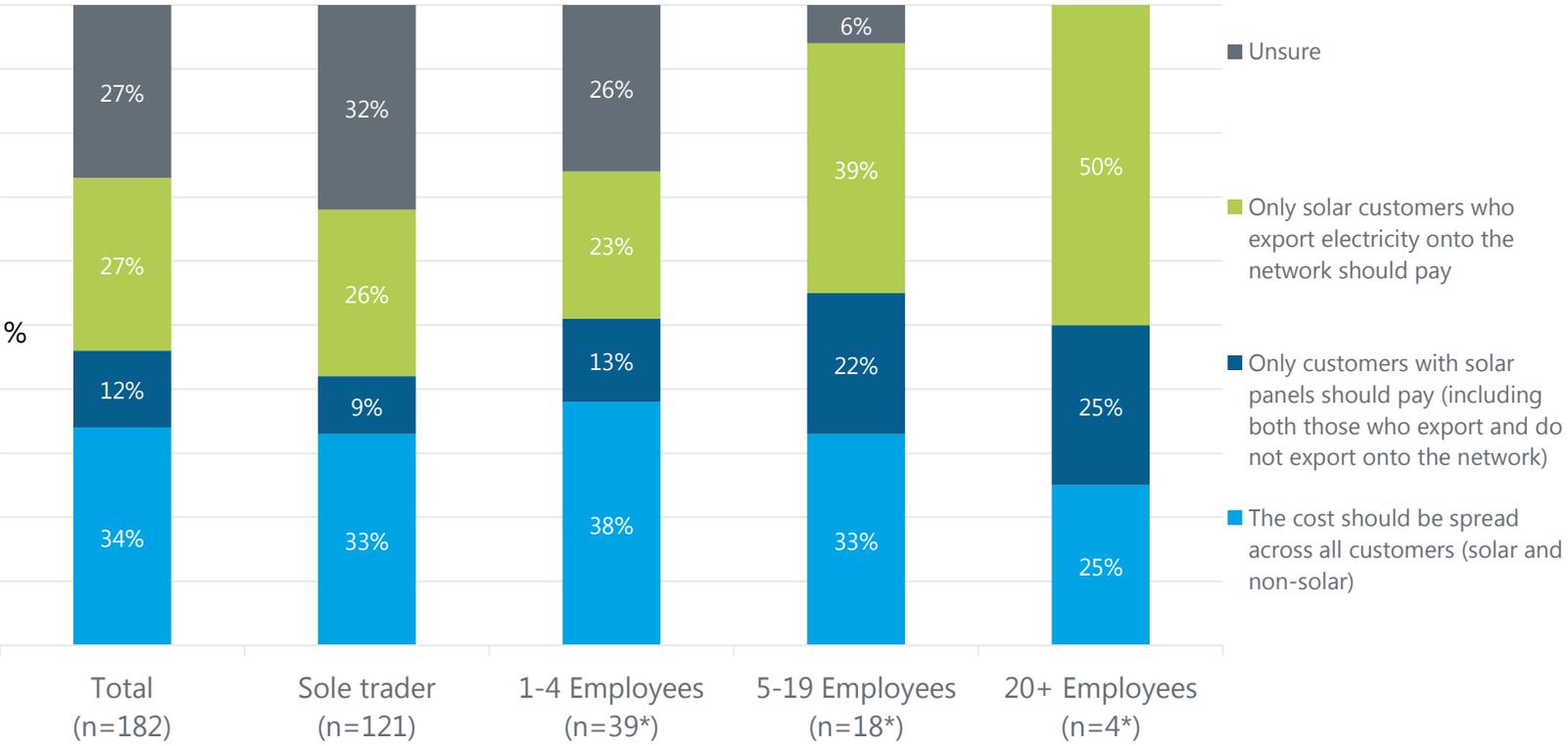
- 4 in 5 SME respondents indicated that solar customers should be able to export back to the grid.

Q21. Currently many customers with solar panels are not able to export their spare electricity onto the network. This is because the network was not originally built to enable a two way flow of electricity and when there is too much electricity exported into the network it causes problems. Investment will need to be made to enable more customers with solar panels to export. In the long term the increase of solar and batteries on the network could benefit all customers by bringing down electricity prices for everyone (including those without solar).

Should solar customers be able to export spare electricity back onto the grid if they want to?

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

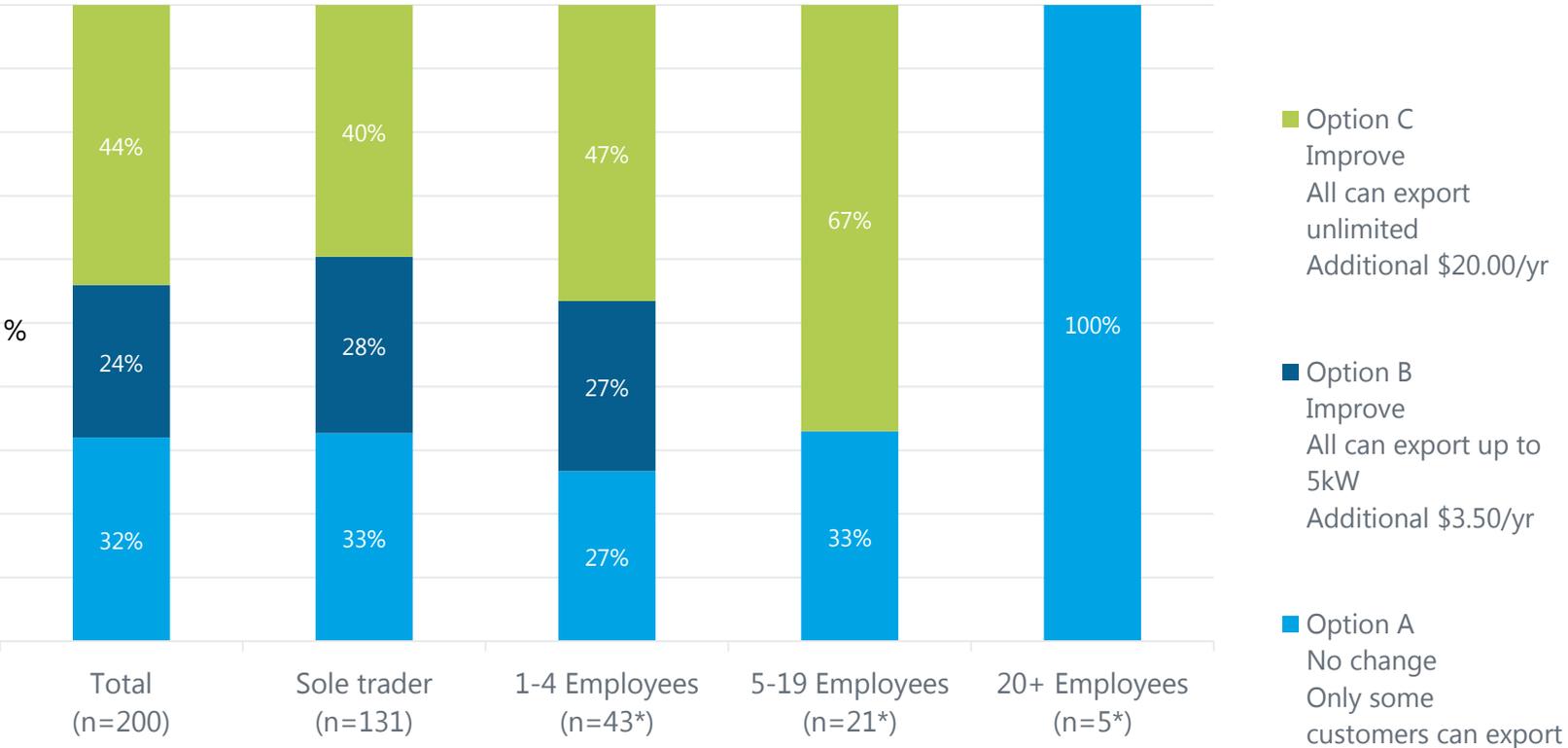
COST FOR EXPORTING BACK TO THE GRID



- Views were split amongst SMEs about who should pay the additional cost to ensure customers with solar panels are able to export.
- 39% believed that solar customers should pay, with most thinking that only those solar customers who export should pay (27%).
- However, 34% believed all customers should pay (61% of those with solar).

Q22. Who should pay for the additional cost of ensuring people with solar panels are able to export their spare electricity onto the network?
 Base: Respondents who believe solar power should be able to be exported to the grid (n=182) * **WARNING: SMALL BASE SIZES**

PREFERENCE FOR EXPORTING SOLAR POWER



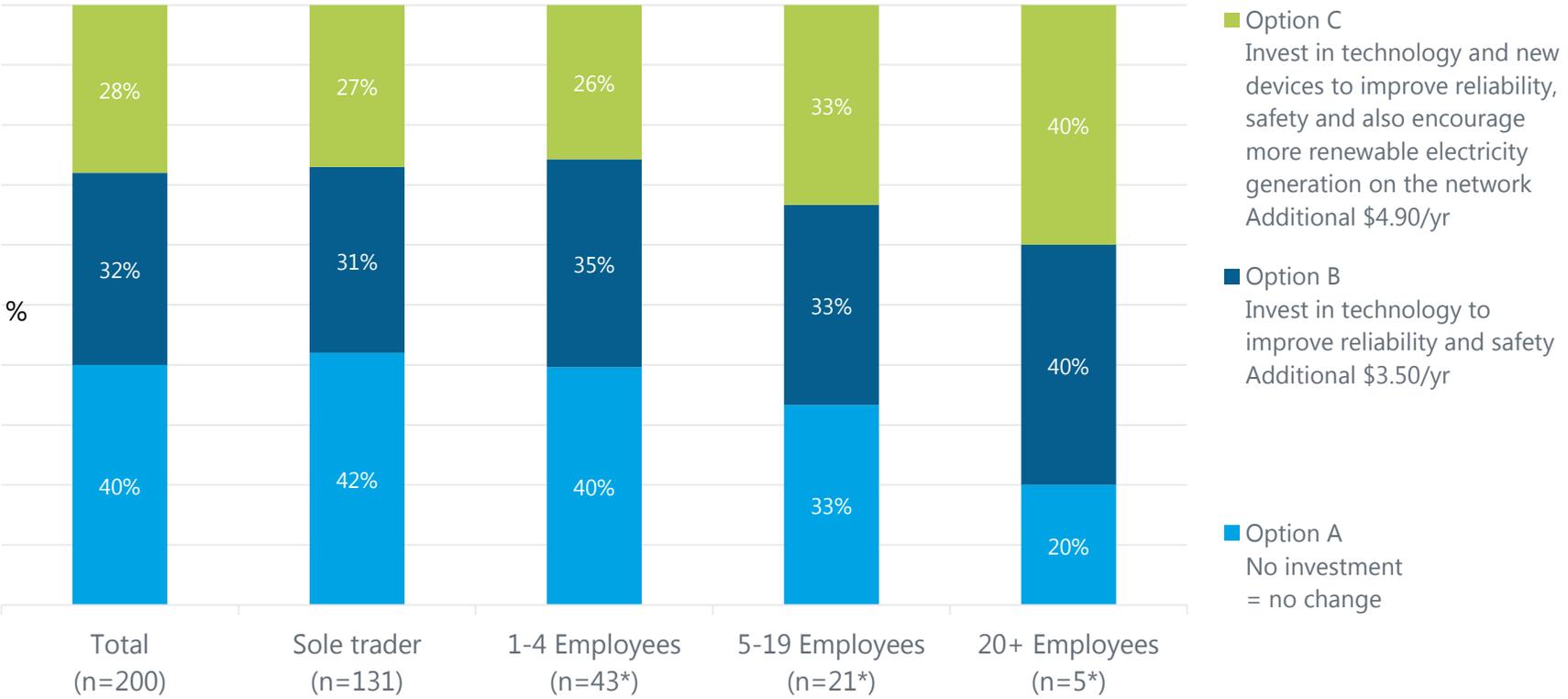
- Two thirds of those who thought the costs should be spread (68%) indicated a preference for improvement, with the majority of these favouring unlimited export.

Q23. And which option would you prefer? *Answers provided after seeing full bill impact*
 Base: Respondents who think the cost should be spread across all customers (n=62) * **WARNING: SMALL BASE SIZES**

**DIGITAL &
RESILIENT
NETWORK**



PREFERENCE FOR INVESTING IN TECHNOLOGY



- 60% of SME respondents indicated there should be an investment in technology to improve at least reliability & safety, which was slightly higher amongst larger businesses.

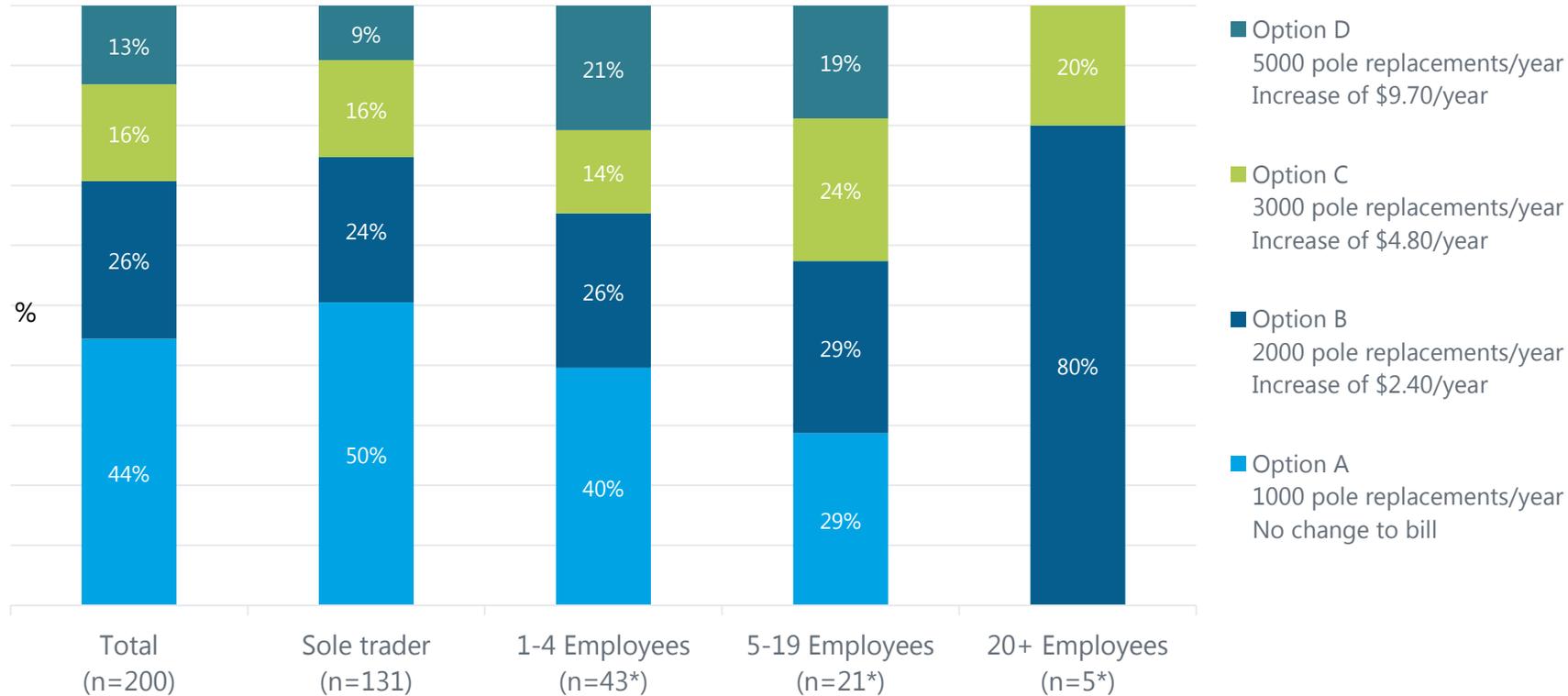
[The distributor] is looking at ways to use new technology to operate more efficiently and effectively. Although there would be a cost initially, in the longer term introducing this technology would reduce the costs of running the network and result in lower customer bills. The technology could be used in a number of programs, such as:

- developing better network pricing and demand management programs for customers,
- detecting electricity theft,
- managing the impact of Electric Vehicles on the network and
- helping to shift energy usage away from peak times to avoid the need for investment.

Q24a. Which option would you prefer? *Answers provided after seeing full bill impact*

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

PREFERENCE FOR POLE REPLACEMENTS



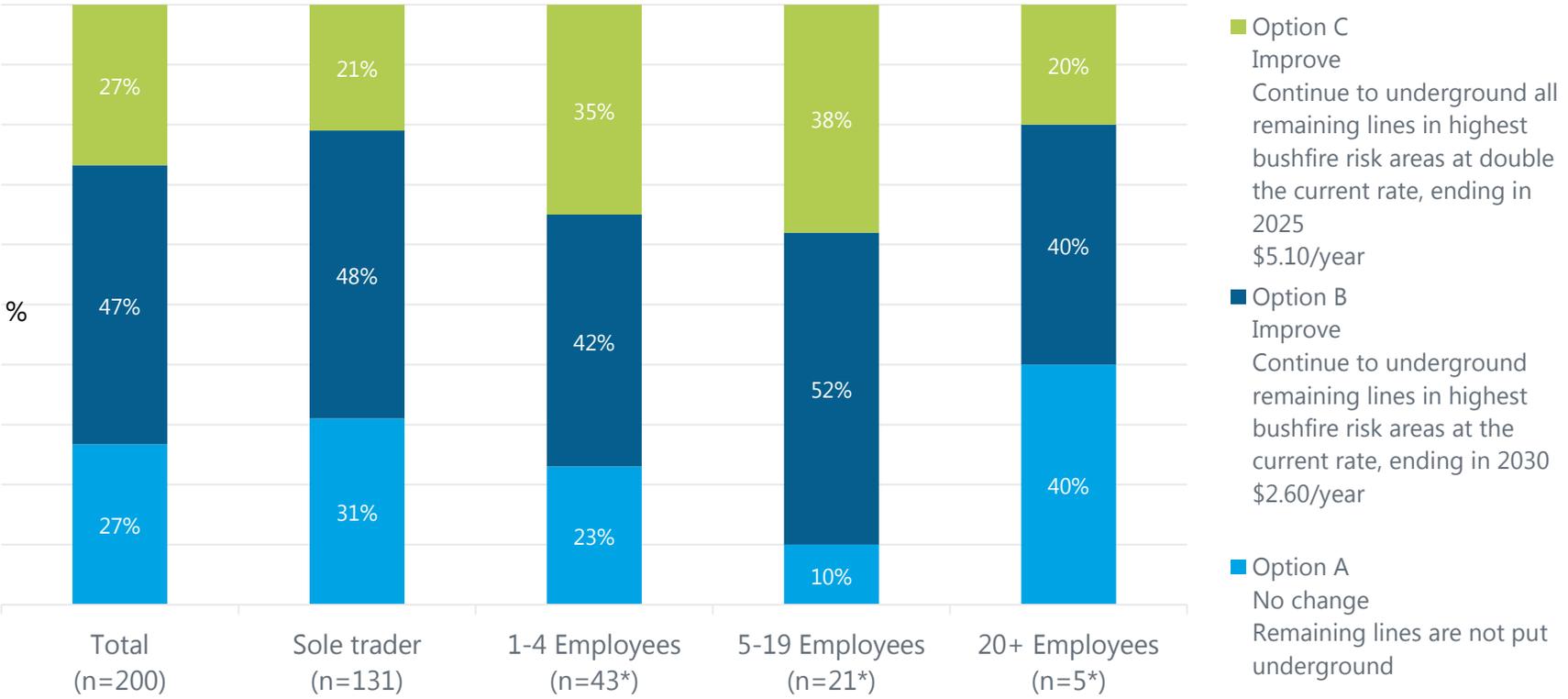
- Powercor SME respondents were willing to pay for an increase in pole replacements of at least 2000 a year (55%), which is slightly higher amongst larger businesses.

[POWERCOR] In bushfire prone areas, faulty poles and broken wires can cause bushfires. If the older poles and wires are replaced with newer ones it reduces the risk of a bushfire being started through a fault. However, this results in higher costs to Powercor and higher electricity bills for customers. At the moment Powercor replaces 1,000 poles per year to strike a balance between cost and safety risk. There are four options for the future replacement of poles and wires provided below: the current option and three others that increase safety but also increase costs.

Q24b. Which option would you prefer? Answers provided after seeing full bill impact

Base: All respondents (n=200) * WARNING: SMALL BASE SIZES

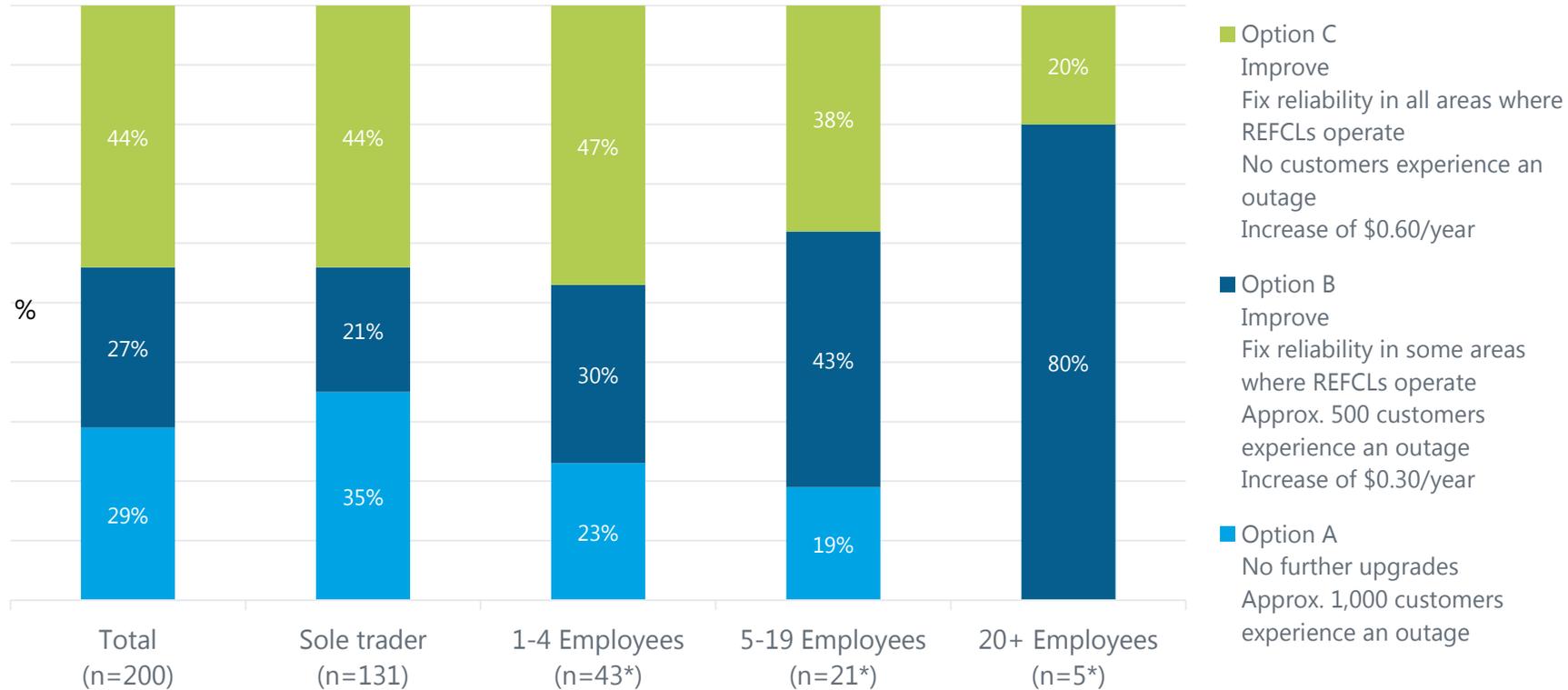
PREFERENCE FOR UNDERGROUNDING POLES



- Nearly three quarters wanted so see Powercor continue to underground poles in bushfire risk areas.
- Half of SME respondents indicated a preference for continuing to underground poles ending in 2030.

Undergrounding powerlines decrease the risk of bushfires. Powercor is considering undergrounding all remaining powerlines in the highest risk bushfire areas either by 2025 or 2030. (Note that 250km of lines are already underground but 450km of lines remain above ground).
 Q25. Which option would you prefer? *Answers provided after seeing full bill impact*
 Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

PREFERENCE FOR IMPROVING UNNECESSARY OUTAGES FROM REFCLs



- Three quarters of SME respondents were willing to pay at least 30c to fix reliability in REFCL areas
- More than 2 in 5 respondents indicated they were willing to pay 60c so that no customers experience an outage.

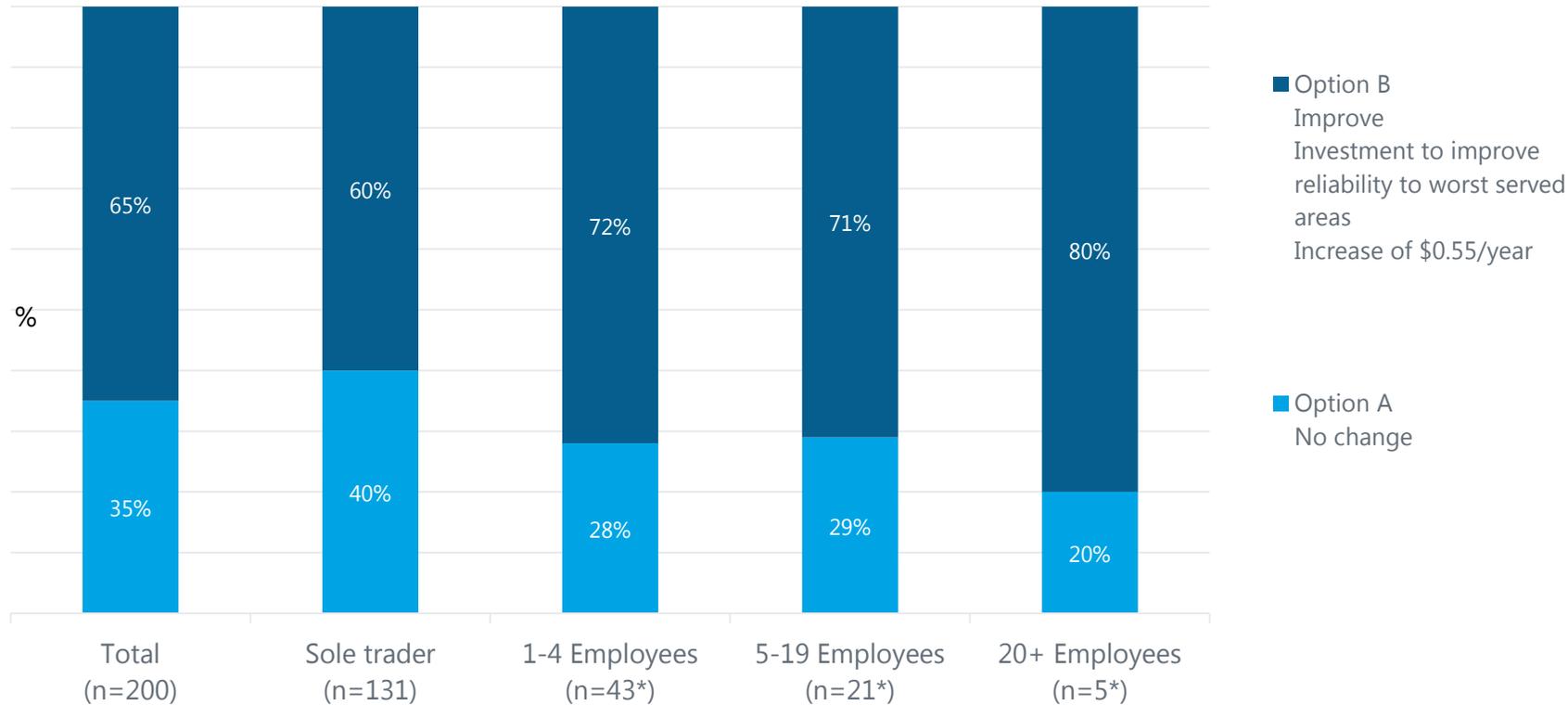
Rapid Earth Fault Current Limiters (REFCLs) work like large safety switches on the network, reducing the risk of fires starting from powerline faults. They detect when one line out of a three-phase powerline has fallen to the ground and almost instantly reduce the voltage on the fallen line. At the same time, they boost the voltage on the two remaining lines in service. This means Powercor can maintain power to homes and businesses while substantially reducing the fire risk. Here is a short video to explain further if you would like more information: https://youtu.be/9yFiX8_ceM8

In the rare occurrence when REFCLs operate during a fault on the network, they can sometimes impact reliability and cause electricity supply to stop to some customers unnecessarily. Powercor is considering whether to invest to fix reliability when REFCLs operate.

Q26. Which of the following options would you prefer? *Answers provided after seeing full bill impact*

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

PREFERENCE FOR IMPROVING RELIABILITY



- Nearly two-thirds of SME respondents wanted to see improvements in reliability for worst served areas. This was slightly higher amongst larger businesses.

Many customers have said they would like to see an improvement in the reliability of electricity supply in worst served areas of the Powercor network. Some of these areas include farming communities that require electricity for their operations and food production. Powercor is considering upgrading the power lines to three phase power in these areas. This means a more reliable supply for those people who are at the end of the lines and may currently experience more outages, and for longer, than everyone else. The cost of this would be spread across all customers and would be 55c a year.

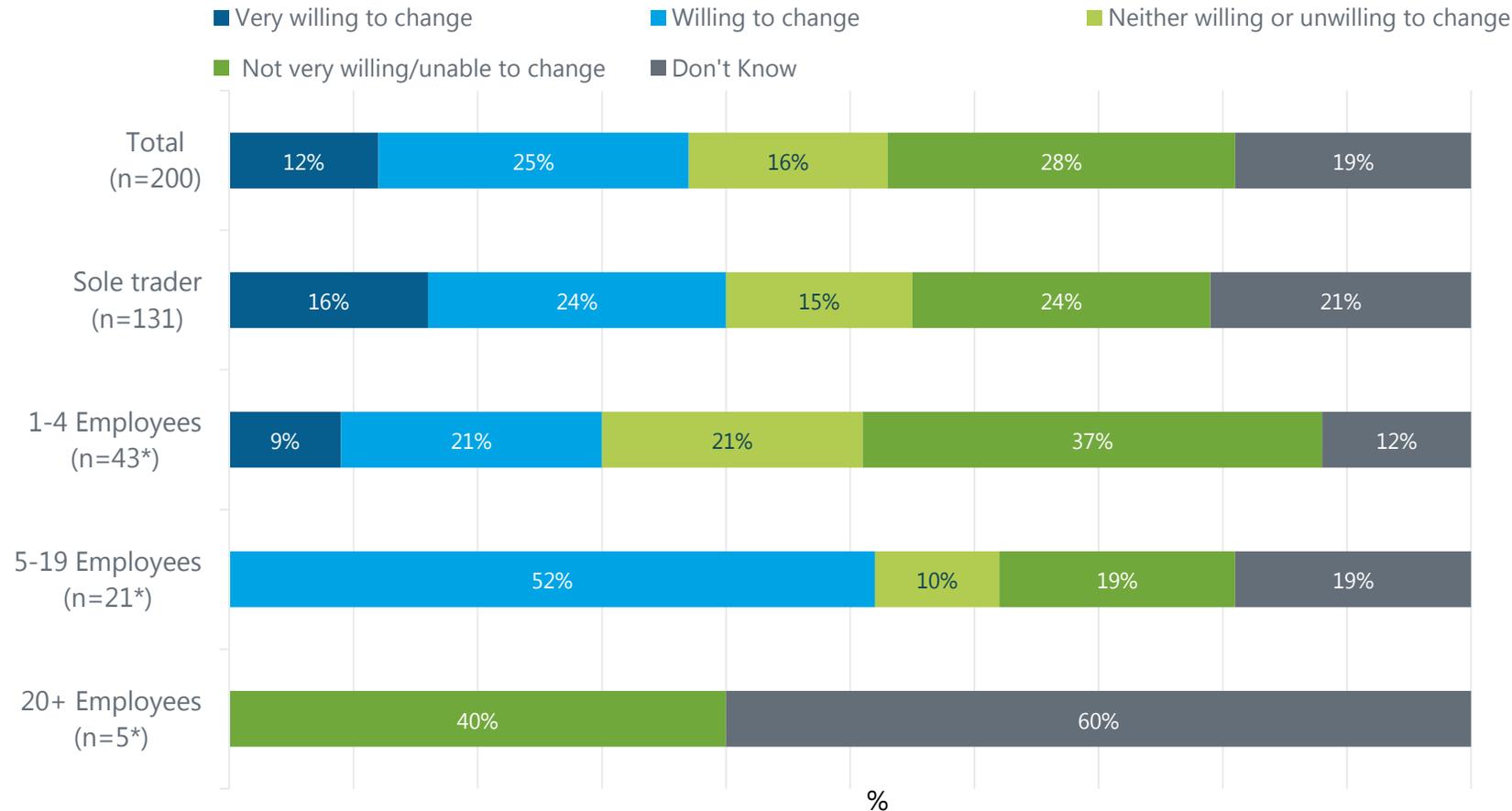
Q27. Which option do you prefer? *Answers provided after seeing full bill impact*

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

AFFORDABLE NETWORK



WILLINGNESS TO CHANGE ELECTRICITY USAGE TIMES

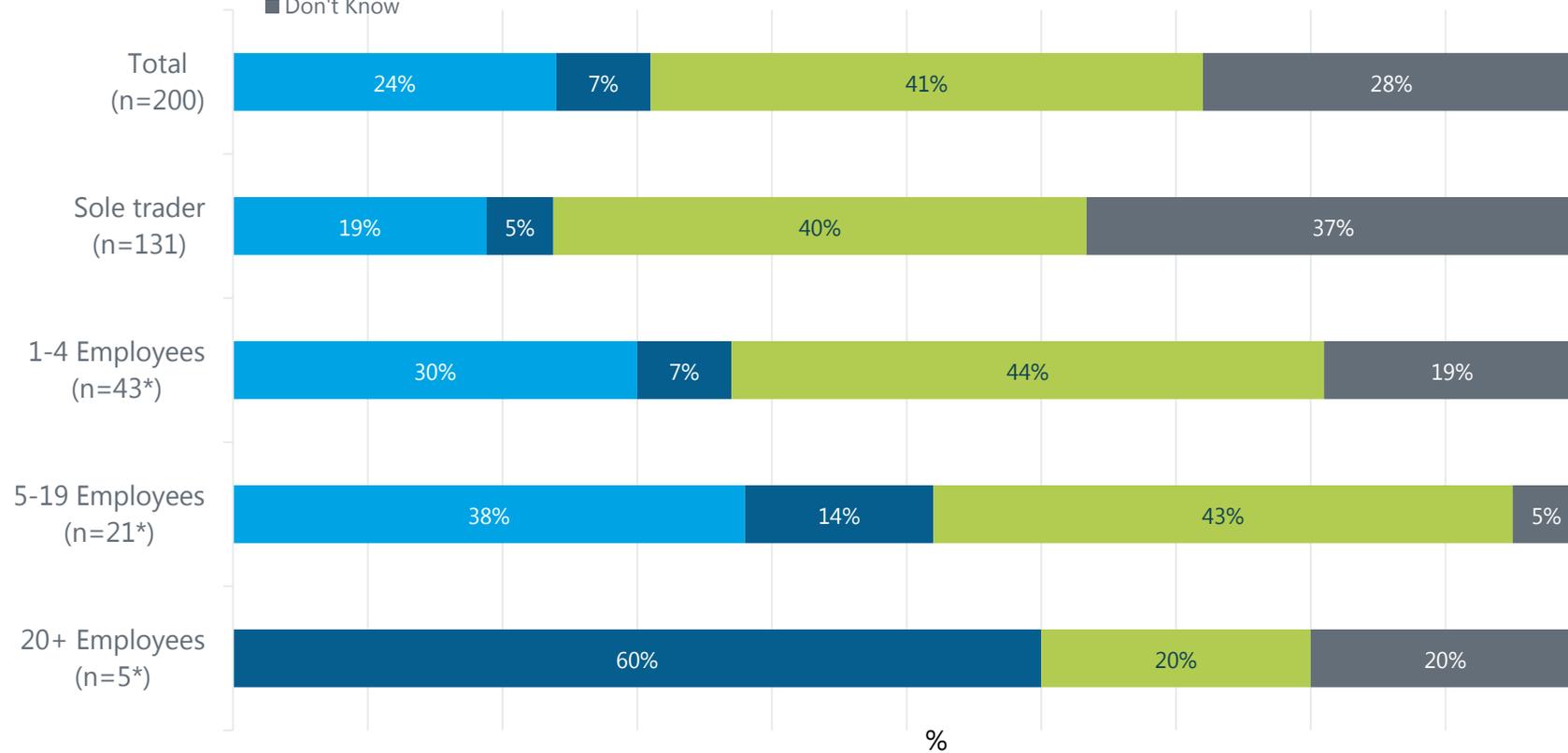


- 37% of SMEs indicated that they are willing to change their electricity usage times in order to save money.
- 28% of SMEs are not very willing or unable to change.

[The distributor] is considering changing the way customers pay for electricity – charging more at certain times of the day and less at others to encourage customers to shift their electricity usage to times when electricity is cheaper. This new approach to billing is called 'Time of Use'. Q28. How willing and able would you be to change the times your business uses electricity if you could save money in doing so? Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

TRANSITIONING TO 'TIME OF USE' PRICING

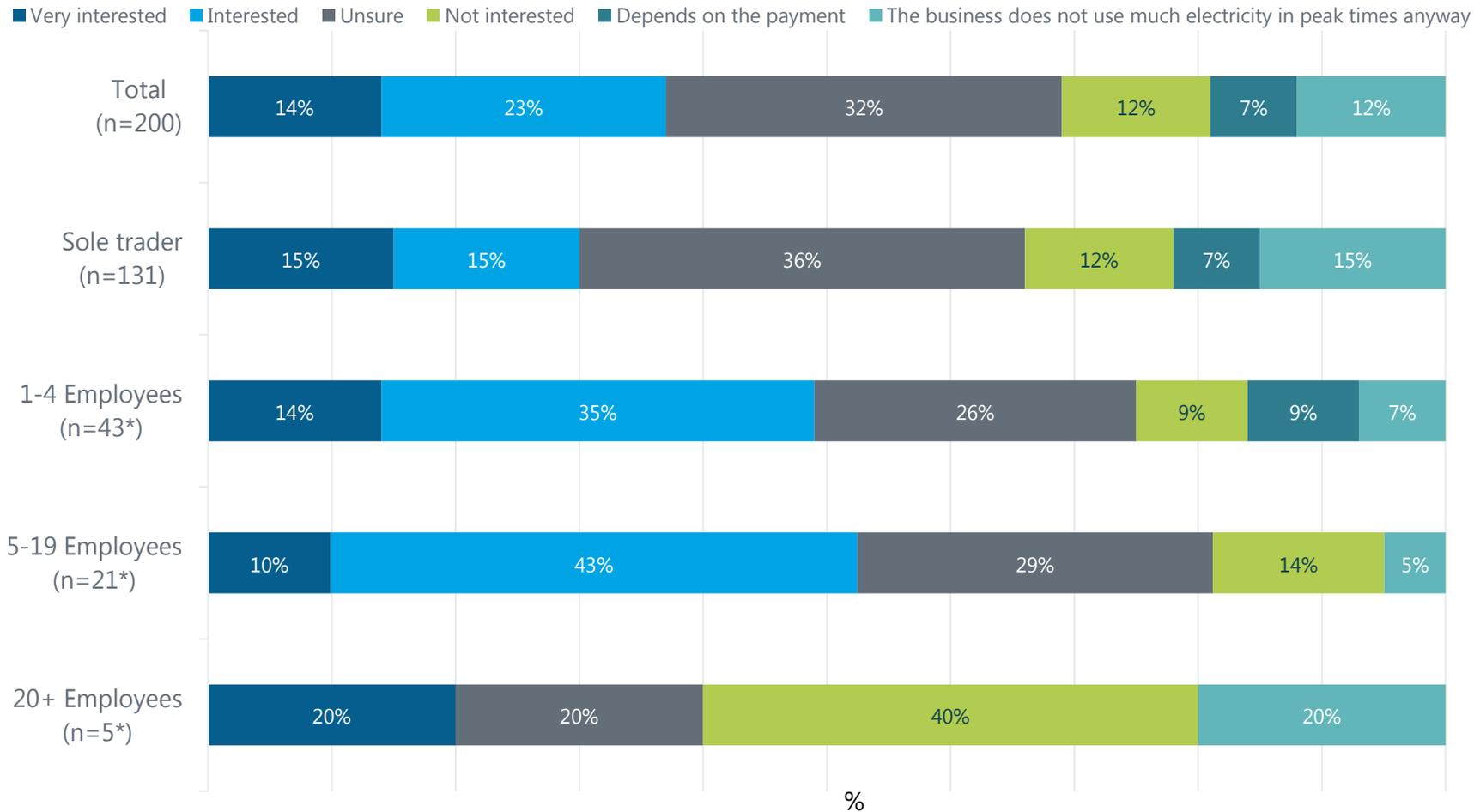
- All businesses should be put on it straightaway (unless they 'opt out') so everyone can start to use electricity at times when it is cheaper
- New premises, businesses with solar and electric vehicle charging should be put on it straightaway
- Businesses should be able to 'opt in' to the new system (choose whether they want the new tariff and savings proposed or they want to stay with the current flat rate)
- Don't Know



- There is a preference amongst SME respondents for 'time of use' pricing to be an opt in transition process (41%).

Q29. If this Time of Use system were to be introduced, how do you think business customers should be moved onto it?
 Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

MONETARY INCENTIVE FOR SHIFTING USAGE



- More than a third of SME respondents were interested in shifting their usage if they were to receive a monetary incentive (37%), with a further 7% saying it would depend on the payment amount.

Q30. [Distributor name] can offer payments directly to customers to ask them to reduce some of their electricity usage from 'peak usage times' (normally the late afternoon and evening). Would you be interested in receiving a payment for shifting your business's electricity usage?
 Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

**OVERALL
PACKAGE FOR
2021-2026**



ALTERATIONS IN WILLINGNESS TO PAY FOR CHANGES

Option	Initial choice for NO CHANGE %	Final choice for NO CHANGE %
Undergrounding poles Base: All respondents (n=200)	30	27
Improving unnecessary outages from REFCLs Base: All respondents (n=200)	32	29
Ability to export excess solar power Base: Respondents who think the cost should be spread across all customers (n=62)	32	32
Improving reliability in worse served areas Base: All respondents (n=200)	36	35
Investing in technology for reliability, safety & encourage renewable energy Base: All respondents (n=200)	42	40
Pole replacements per year Base: All respondents (n=200)	47	44
Access to data Base: All respondents (n=200)	63	60
The speed to answer calls Base: All respondents (n=200)	73	72

- After seeing the final impact on their bill, business customers were slightly more willing to pay for improvements across most aspects.

Now we want to confirm the overall package of options you'd prefer in [the distributor's] proposals for 2021-26. In the next question, we will show you the overall impact on your bill from your chosen options (answers given to previous questions). You will be able to change your choices if you wish.

Base: All respondents (n=200) or as shown

SUMMARY OF PREFERENCES

Undergrounding poles		Improving unnecessary outages from REFCLs		Ability to export solar power*		Improving reliability in worst served areas		Investing in new technology		Access to data		Pole replacements			The speed to answer calls
No Change +\$0 Survey 27%		No Change +\$0 Survey 29%		No Change +\$0 Survey 32%		No Change +\$0 Survey 35%		No Change +\$0 Survey 40%		No Change +\$0 Survey 44%		No Change +\$0 Survey 44%			No Change +\$0 Survey 72%
Improve Survey 73%		Improve Survey 71%		Improve Survey 68%		Improve Survey 65%		Improve Survey 60%		Improve Survey 56%		Improve Survey 56%			Improve Survey 28%
47% Option B Underground in bushfire areas ending 2030 +\$2.60/yr	27% Option C Underground in bushfire areas ending 2025 +\$5.10/yr	27% Option B Approx 500 customers experience outages +\$0.30/yr	44% Option C No customers experience outages +\$0.60/yr	24% Option B All can export up to 5kW +\$3.50/yr	44% Option C All can export unlimited +\$20.00/yr	65% Option B invest to improve +\$0.55/yr	32% Option B Improve reliability & safety +\$3.50/yr	28% Option C Improve reliability safety, & encourage renewable generation +\$4.90/yr	23% Option B Next day w 15min intervals +\$1.20/yr	18% Option C Real time w 15min intervals +\$1.40/yr	26% Option B 2000 replacements/year +\$2.40/yr	18% Option C 3000 replacements/year +\$4.80/yr	13% Option D 5000 replacements/year +\$9.70/yr	28% Option B 30 sec or less to answer +\$2.00/yr	

* Note that only a sub-set of the sample were asked this question (those who believed that all customers should pay). However, the majority believed that solar customers should pay rather than all customers.

TOTAL AMOUNTS WILLING TO PAY FOR CHANGES

Option	Total (n=200) %	Sole Trader (n=131) %	1-4 Employees (n=43*) %	5-19 Employees (n=21*) %	20+ Employees (n=5*)
\$0 → not willing to pay for any changes	16	23	9	-	-
\$0.01 – \$5.00	17	16	16	24	-
\$5.01 – \$10.00	19	15	28	14	60
\$10.01 – \$15.00	20	20	16	33	-
\$15.01 – \$20.00	9	11	7	5	20
\$20.01 – \$25.00	5	4	7	5	-
\$25.01 – \$30.00	2	1	5	-	-
\$30.01 or more	12	11	12	19	20
Average	\$12.02	\$10.92	\$12.87	\$15.70	\$14.70

- 16% of SME respondents indicated they were not willing to pay for any changes.
- 56% of SMEs indicated they were willing to pay up to \$15 extra in their annual bills for changes.

Now we want to confirm the overall package of options you'd prefer in [the distributor's] proposals for 2021-26. In the next question, we will show you the overall impact on your bill from your chosen options (answers given to previous questions). You will be able to change your choices if you wish.

Base: All respondents (n=200) * **WARNING: SMALL BASE SIZES**

DEMOGRAPHICS



DEMOGRAPHICS

	All respondents %
No. of employees	
Sole trader	60
1-4 employees	28
5-10	5
11-19	5
20-199	2
Position	
Owner/proprietor	57
Senior management	7
Other employee	37

	All respondents %
Length of business operation	
Less than 1 year	18
1-2 years	7
3-5 years	15
6-10 years	11
More than 10 years	48
Business premises	
Own	45
Rent/Lease	31
Other	5
NA (run business form home)	20

Q2. How many employees do you have in your business, by employees I mean full time equivalents other than the proprietor

Q7. Do you speak a language other than English at home/with family?

Q31. What is your position or title within your organisation

Q32. How many years has your business been operating?

Q33. Does your business own or rent/lease its business premises?

Base: All respondents (n=200)

DEMOGRAPHICS

	All respondents %
Usage	
Low (under 2000)	48
Medium (2001 - 7999)	40
High (8000+)	12

	All respondents %
Industry	
Agriculture, forestry, fishing and hunting	7
Manufacturing	2
Electricity, Gas and Water supply	1
Construction	3
Retail trade	10
Accommodation, cafes and restaurants	6
Transport and storage	3
Communication services	2
Finance and insurance	6
Property and business services	4
Education	2
Health and community services	8
Cultural and recreational services	1
Personal services	5
Other	41

Q3. And what industry does your business operate within?
Q8. Usage.

Base: All respondents (n=200)

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