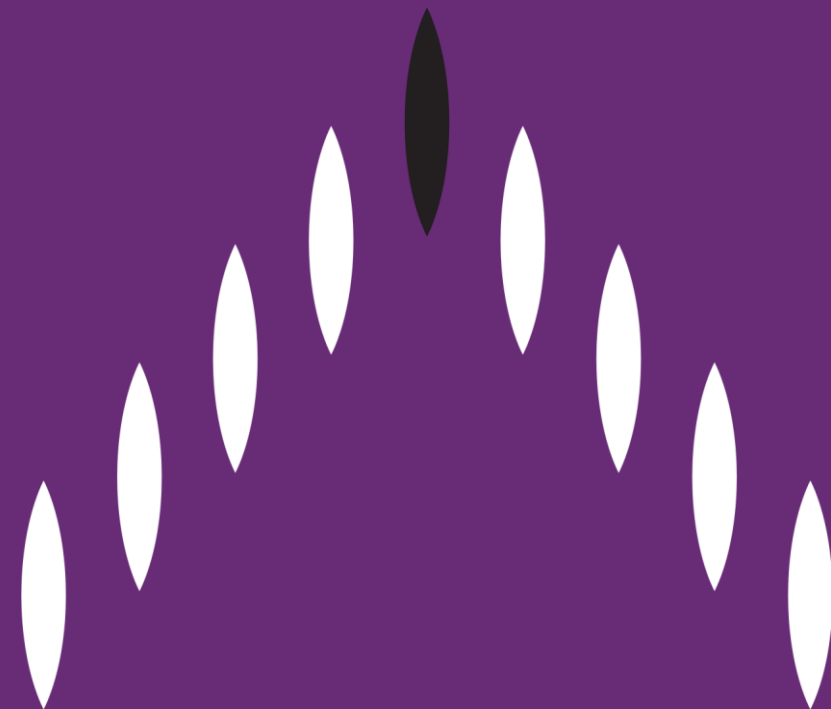


ENERGY CONSUMER BEHAVIOUR SURVEY

Small Business Topline Results
October 2022

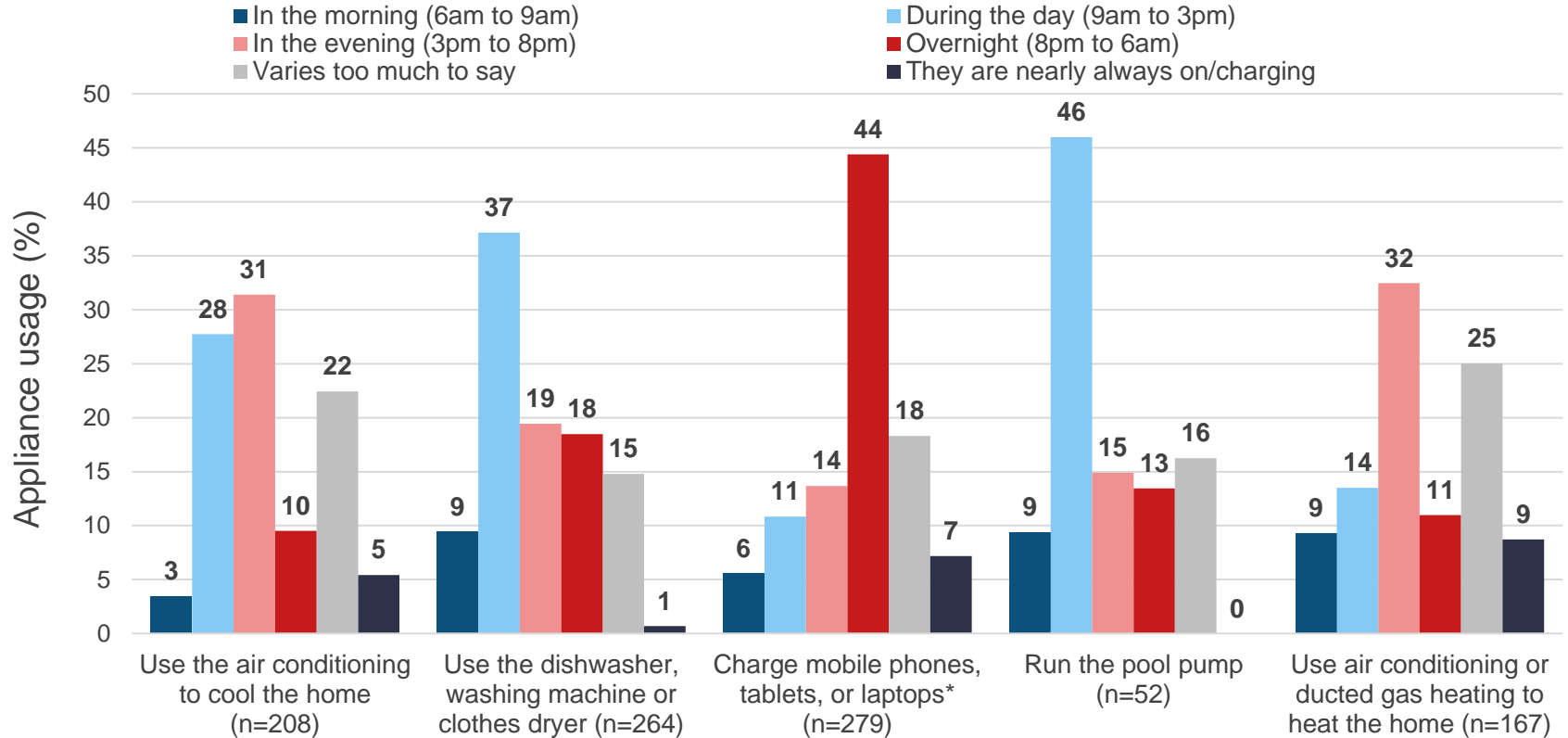


Changing Behaviour

- 37% of businesses (home/mobile locations) use washing appliances during the day. 28% use their air conditioning to cool their home during the day, 14% use this to heat the home during the day. Charging electronic devices is usually done overnight (44%).
- For those businesses (home/mobile) using appliances during peak hours, the majority would find it easy to switch usage to off-peak hours. 30% of those using air conditioning to cool the home during peak hours say it would be quite difficult to change usage times.
- Home/mobile businesses are willing to reduce peak energy use, with around a third willing if offered a financial incentive, and a further half even if no incentive was offered.
- There has been a shift away from smart devices with 17% of businesses (Home/mobile) highly likely to use smart devices (down from 23% in 2021).

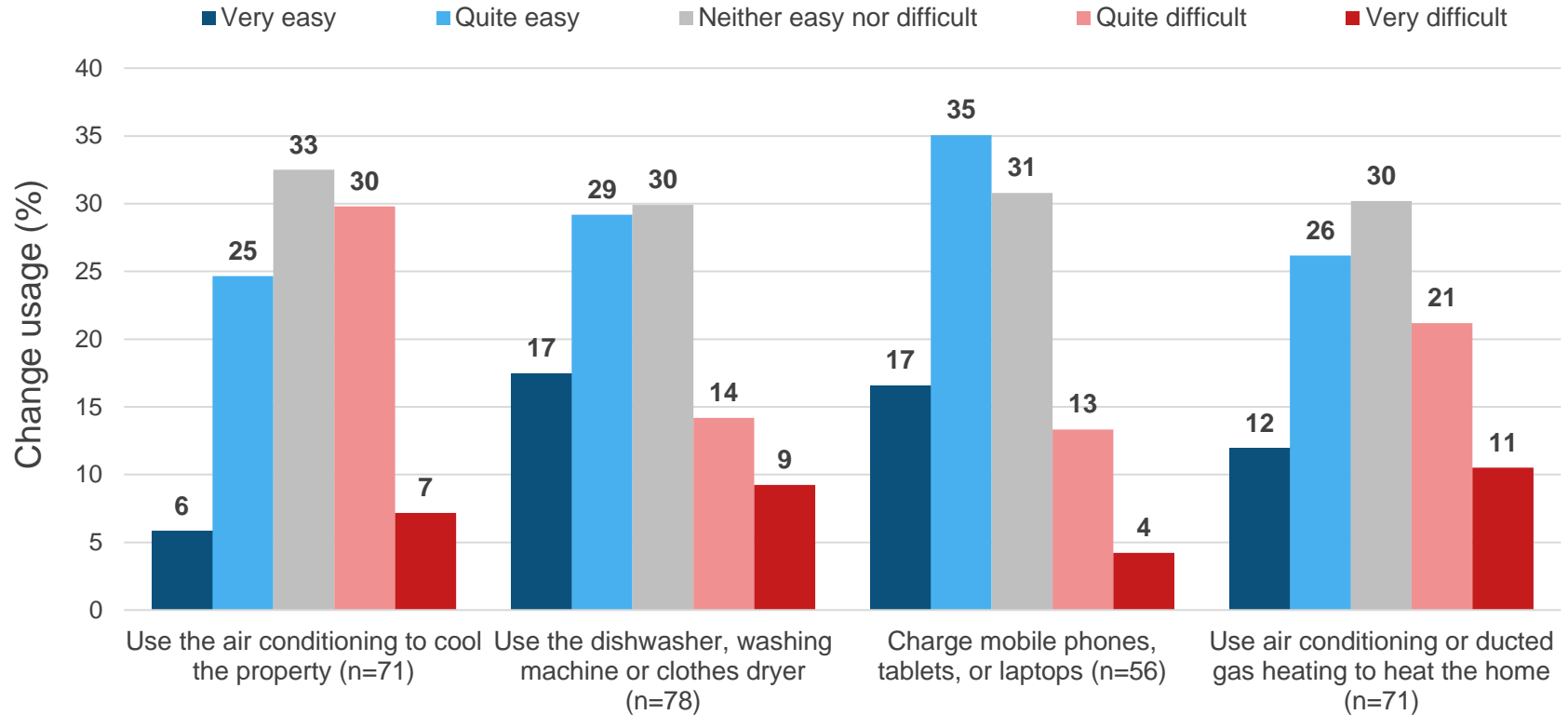


Electrical appliance use



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

Difficulty to change electrical appliance use

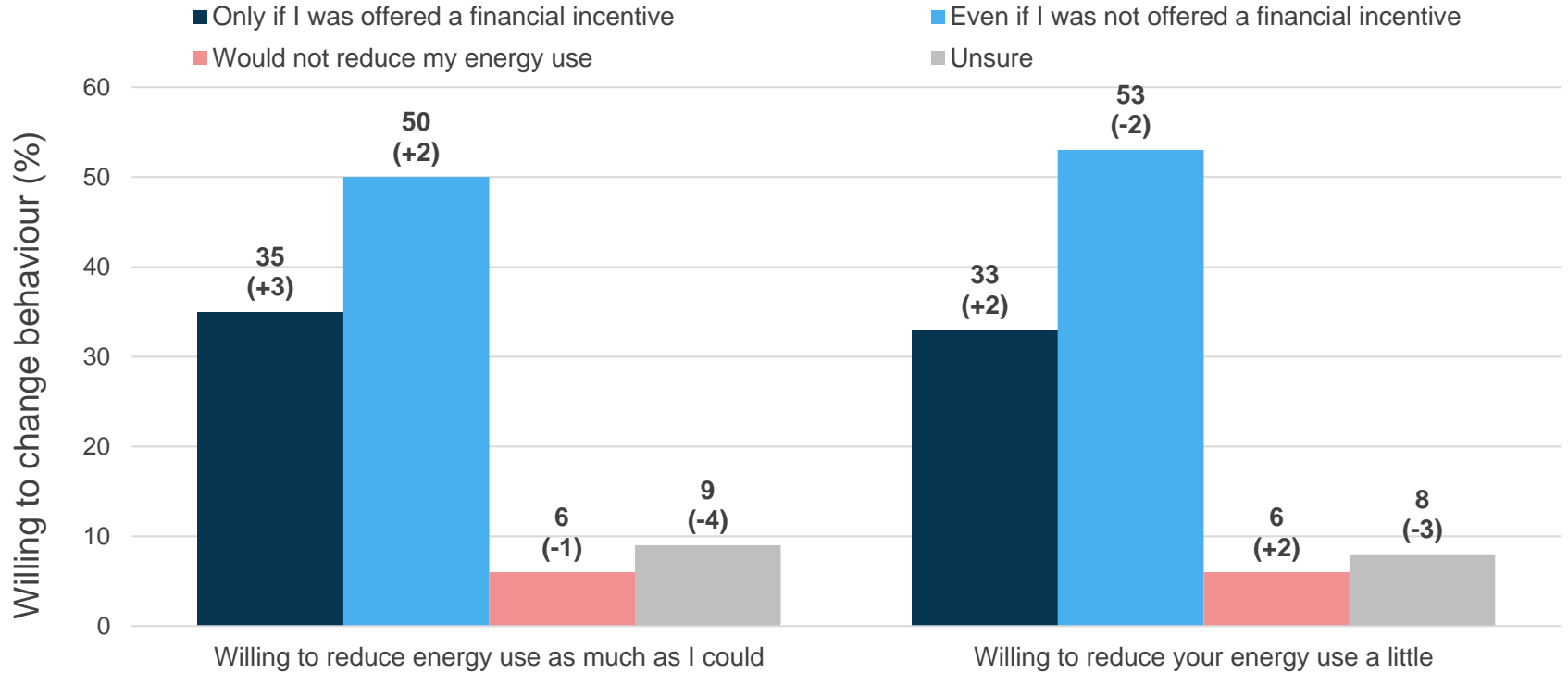


Q: How easy or difficult would it be for your household to change when you do these things to a time when there is less demand for energy (e.g. to the middle of the day or overnight)?

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

Results suppressed for any product with sample size <50

Willingness to change behaviour

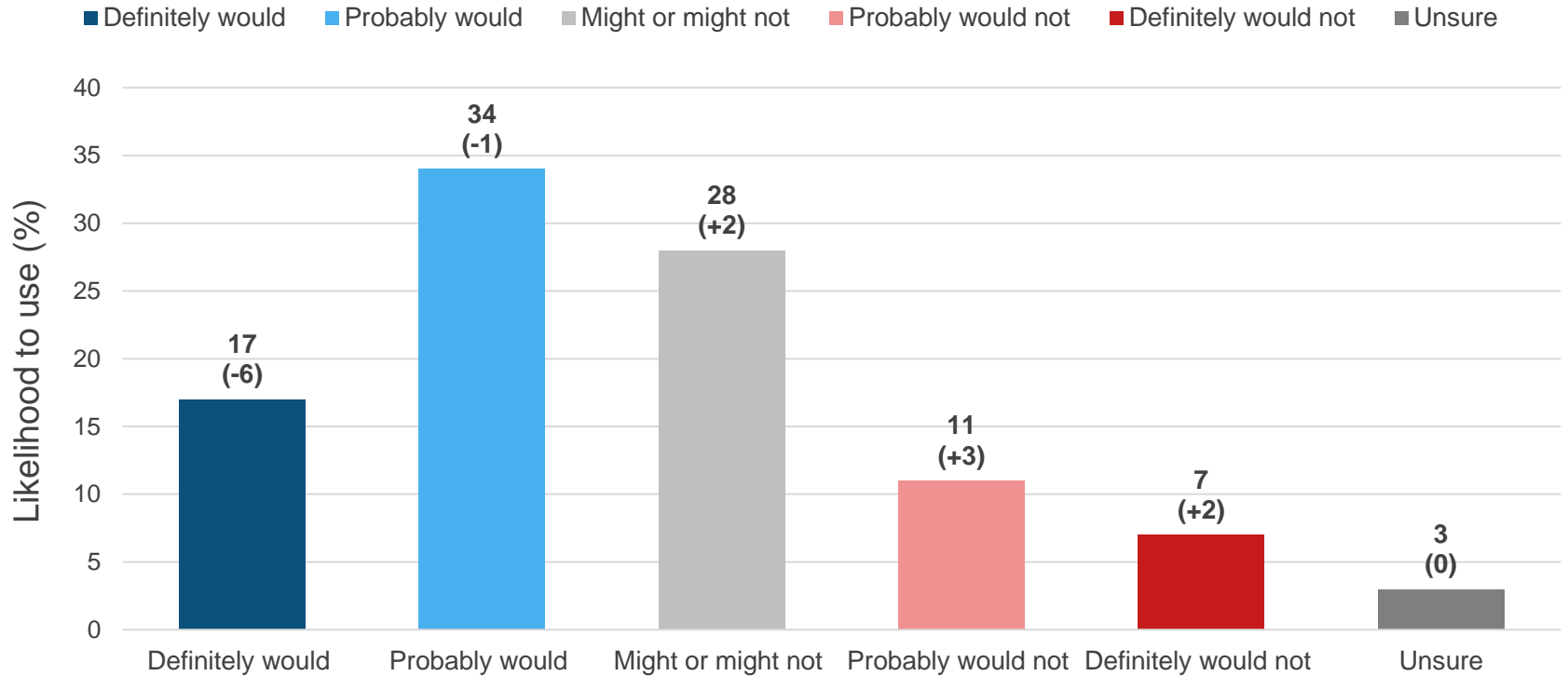


Q: If there was such a campaign asking that people reduce their energy use during a very hot period, would you be willing to reduce your energy use as much as you could for any of the reasons below?

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

Base size: All businesses operating from home/mobile locations (n=279)

Likelihood to use smart appliances



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

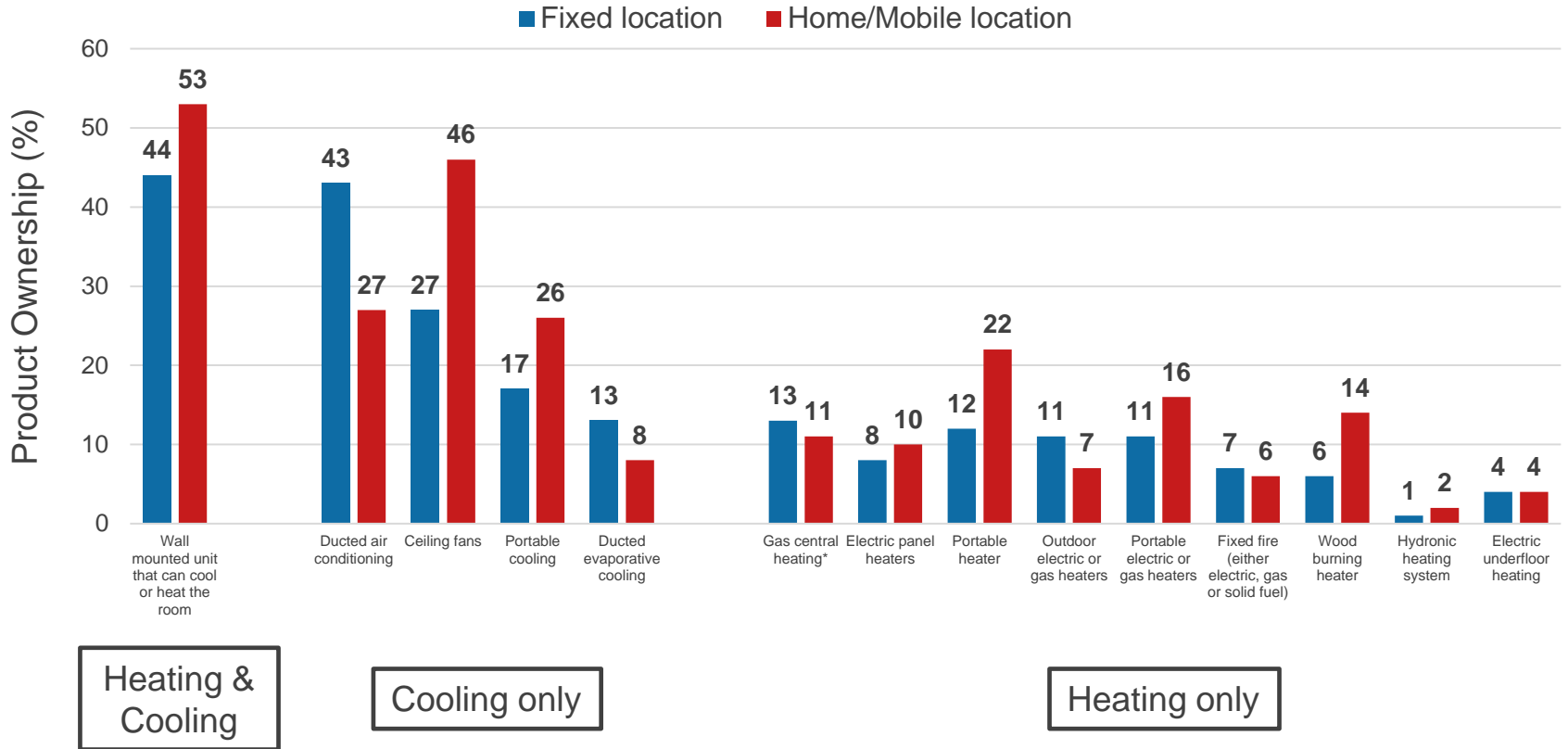
Base size: All businesses operating from home/mobile locations (n=279)

Ownership

- Home/mobile businesses are more likely than businesses operating from fixed locations to use portable heating and cooling devices and ceiling fans. Businesses with fixed location are more likely to use ducted cooling.
- 24% of businesses in fixed locations have an electric battery storage capacity in their premises/building. 8% use electric vehicles.
- Businesses in fixed locations are most likely to use all appliances to monitor and control energy use (digital meter, smart thermostat etc.).



Products Owned: Heating & Cooling

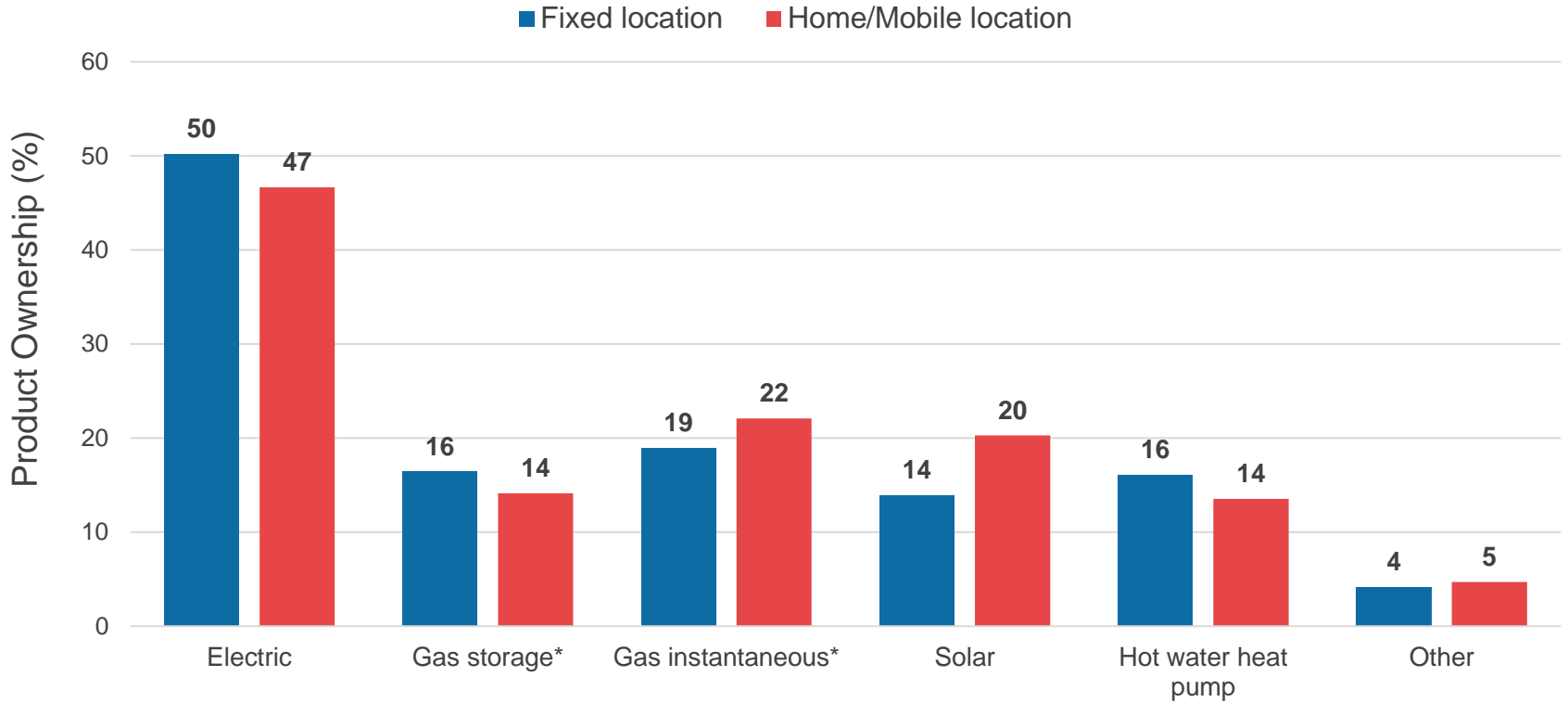


Q: Which of the following do you have for managing the temperature at your place of business/property? MULTIPLE CHOICE

Base size: All businesses in fixed location (n=236), All businesses operating from home/mobile locations (n=279)

*Gas central heating asked to those with mains gas. Re-based to all businesses

Products Owned: Hot Water Systems

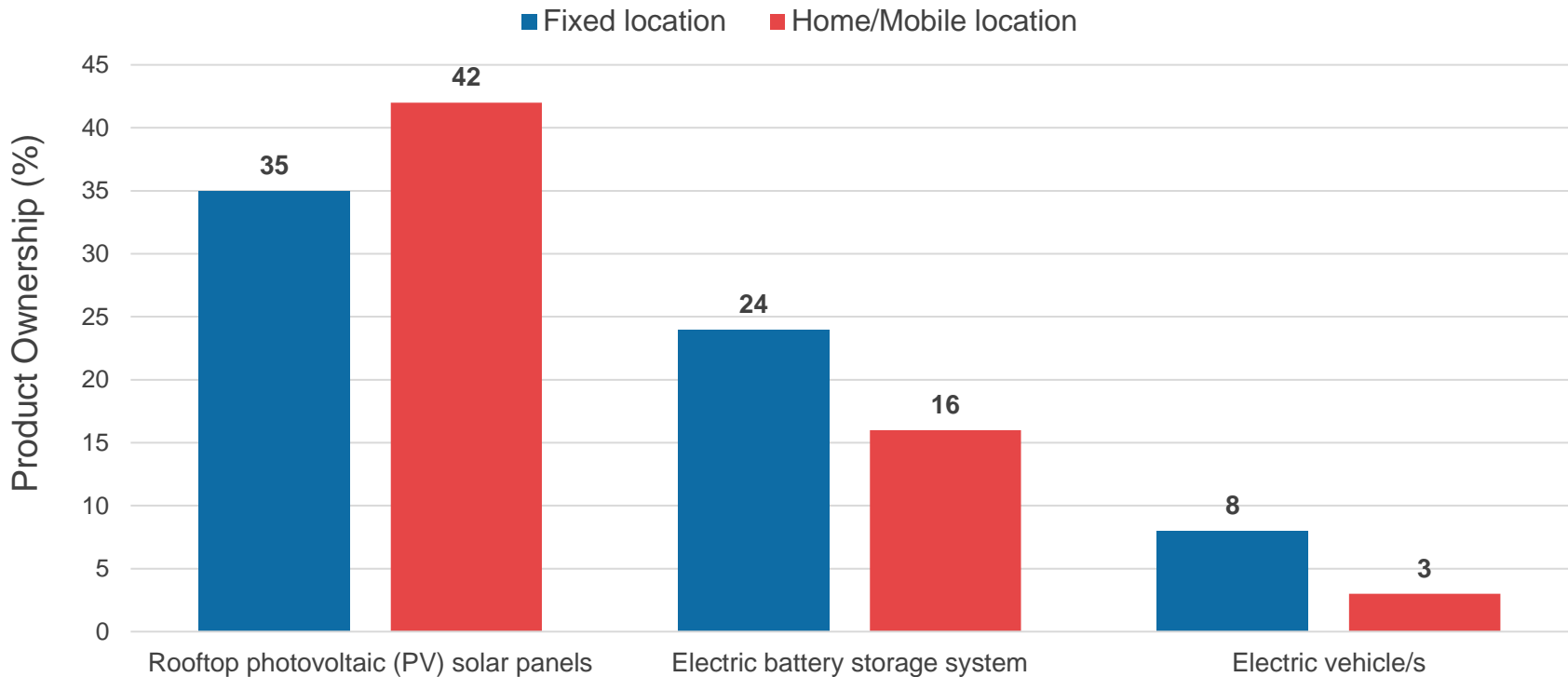


Q: Which hot water systems do you use at your place of business/property? MULTIPLE CHOICE

Base size: All businesses in fixed location (n=236), All businesses operating from home/mobile locations (n=279)

*Gas storage and Gas instantaneous asked to those with mains gas. Re-based to all businesses.

Products Owned: Electricity Generation and Storage

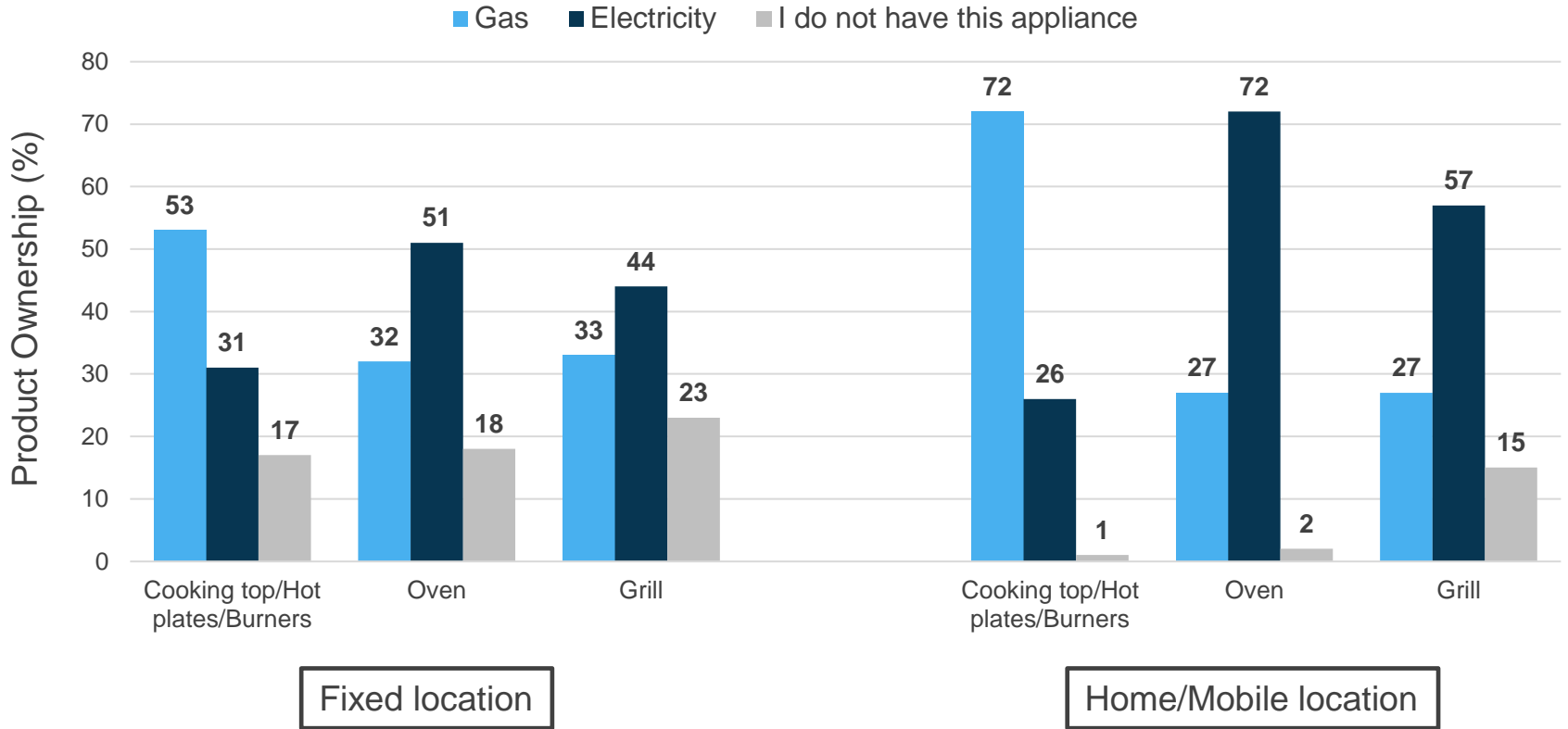


Q: Which of the following electricity generation and storage appliances do you have at your place of business/property? MULTIPLE CHOICE

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

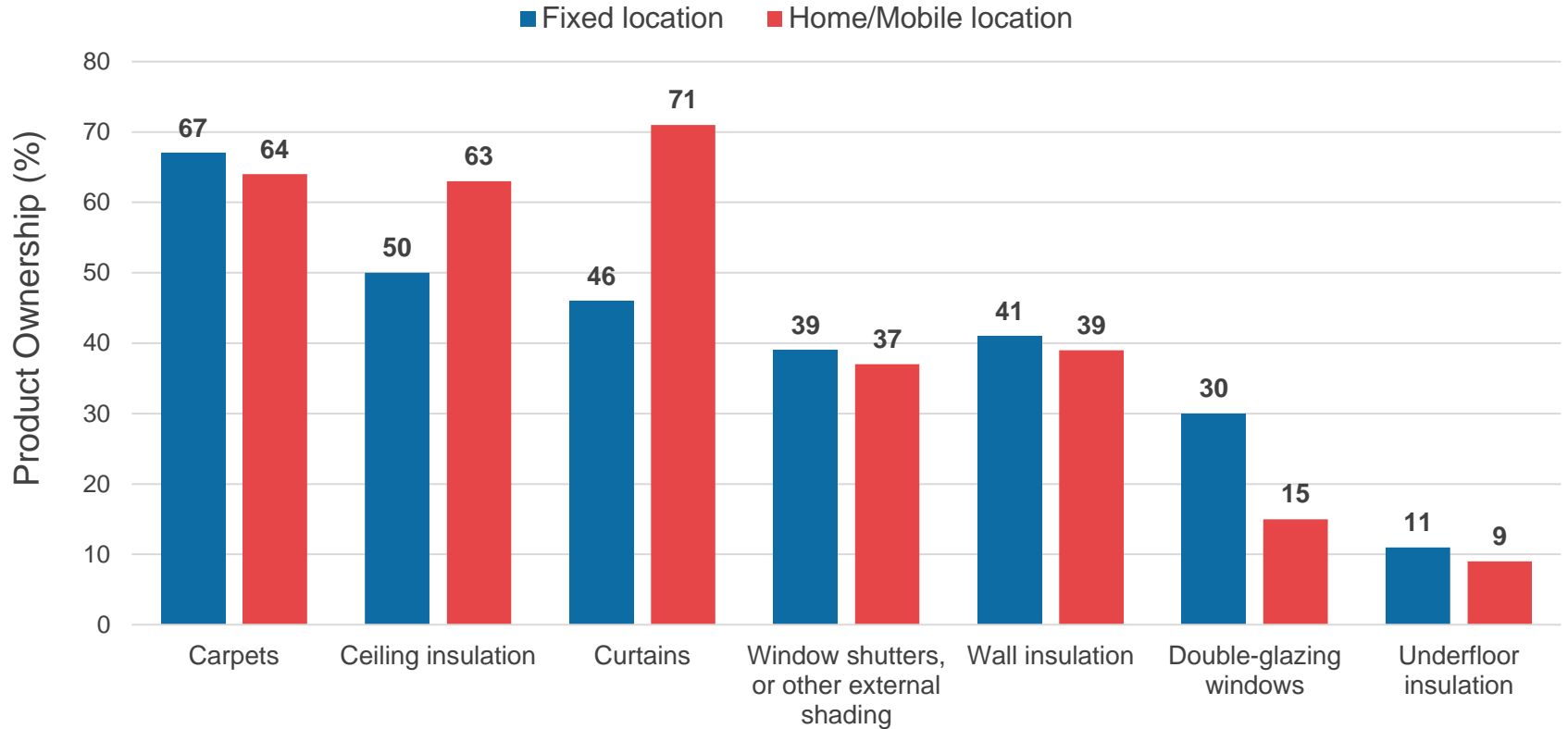
Base size: All businesses in fixed location (n=236), All businesses operating from home/mobile locations (n=279)

Products Owned: Cooking



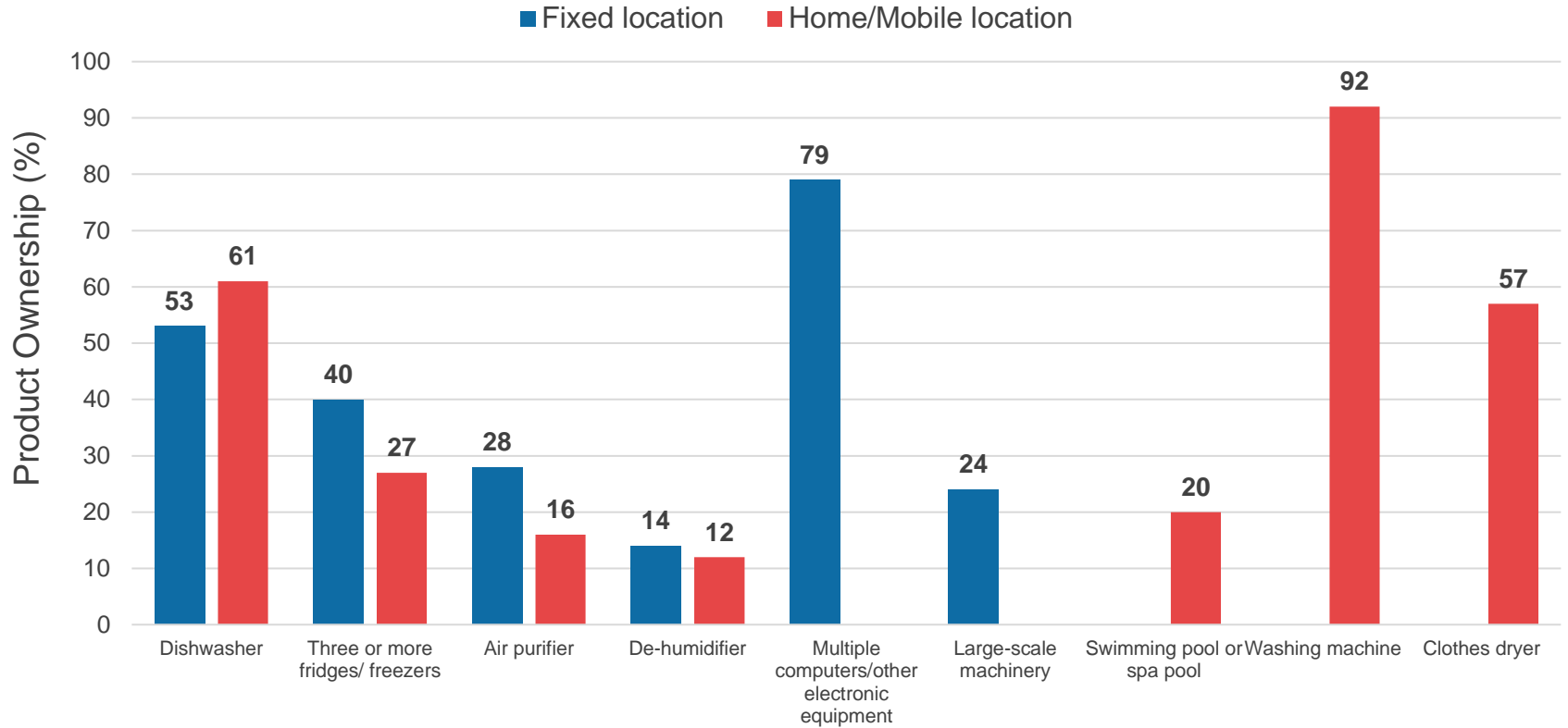
Q: Which energy source do the following cooking appliances use at your place of business/property?
 Base size: All businesses in fixed location with mains gas (n=152), All businesses operating from home/mobile locations with mains gas (n=153)

Products Owned: Insulation



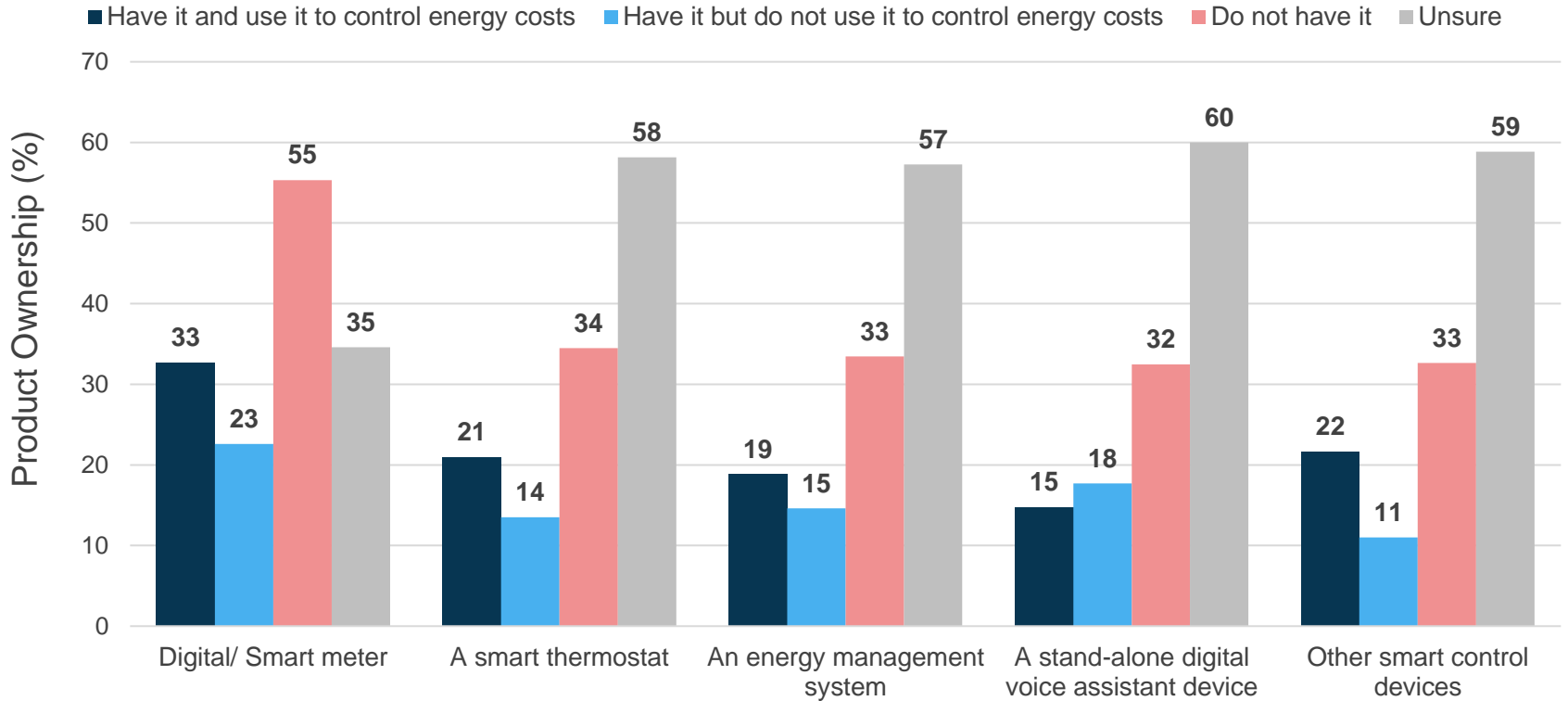
Q: Does your place of business/property have any of the following insulation features? MULTIPLE CHOICE
 Base size: All businesses in fixed location (n=236), All businesses operating from home/mobile locations (n=279)

Products Owned: Appliances



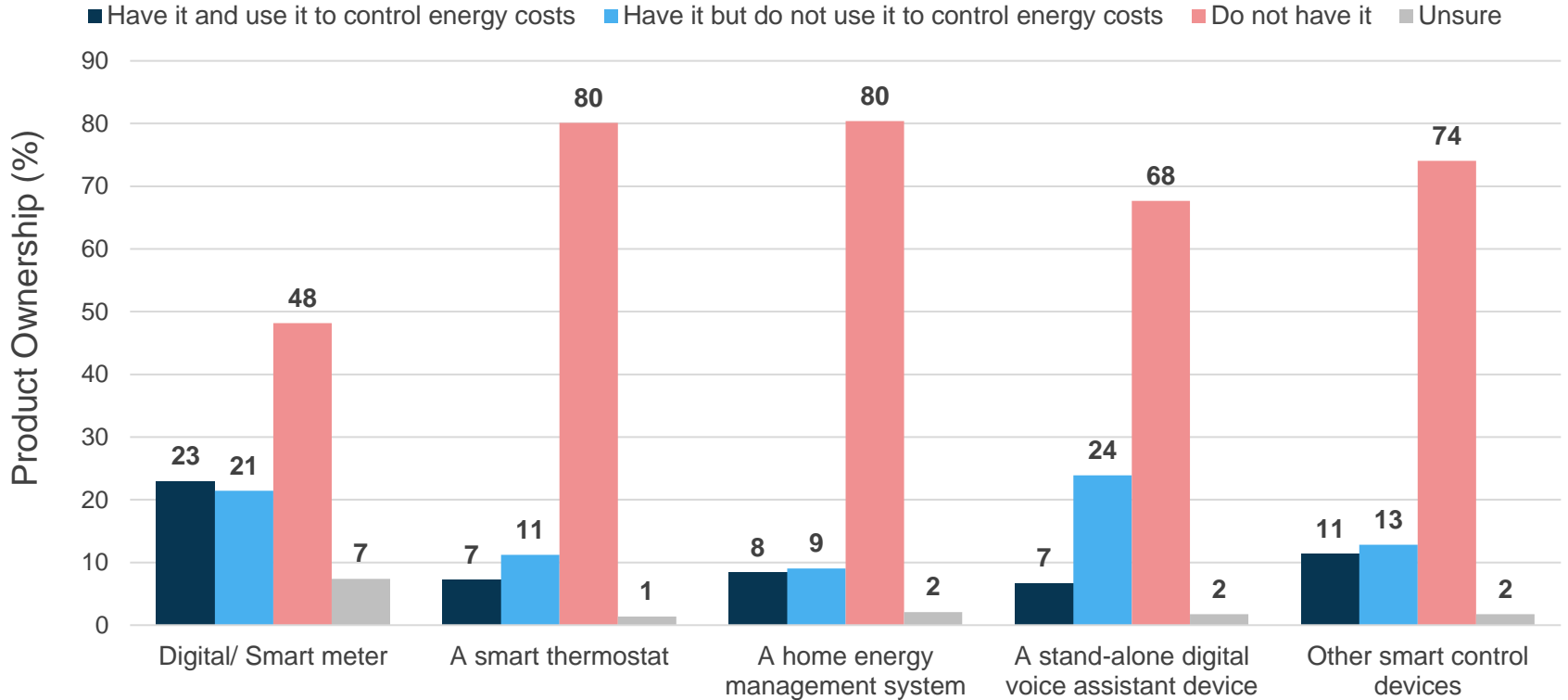
Q: Which of the following electrical appliances do you have at your place of business/property? MULTIPLE CHOICE
 Base size: All businesses in fixed location (n=236), All businesses operating from home/mobile locations (n=279)
 Some products only asked to fixed or home/mobile businesses

Products Owned: Smart Devices



Q: Which of the following technology do you have in your place of business, and which do you use to help control your energy costs?
 Base size: All businesses in fixed location (n=236)

Products Owned: Smart Devices



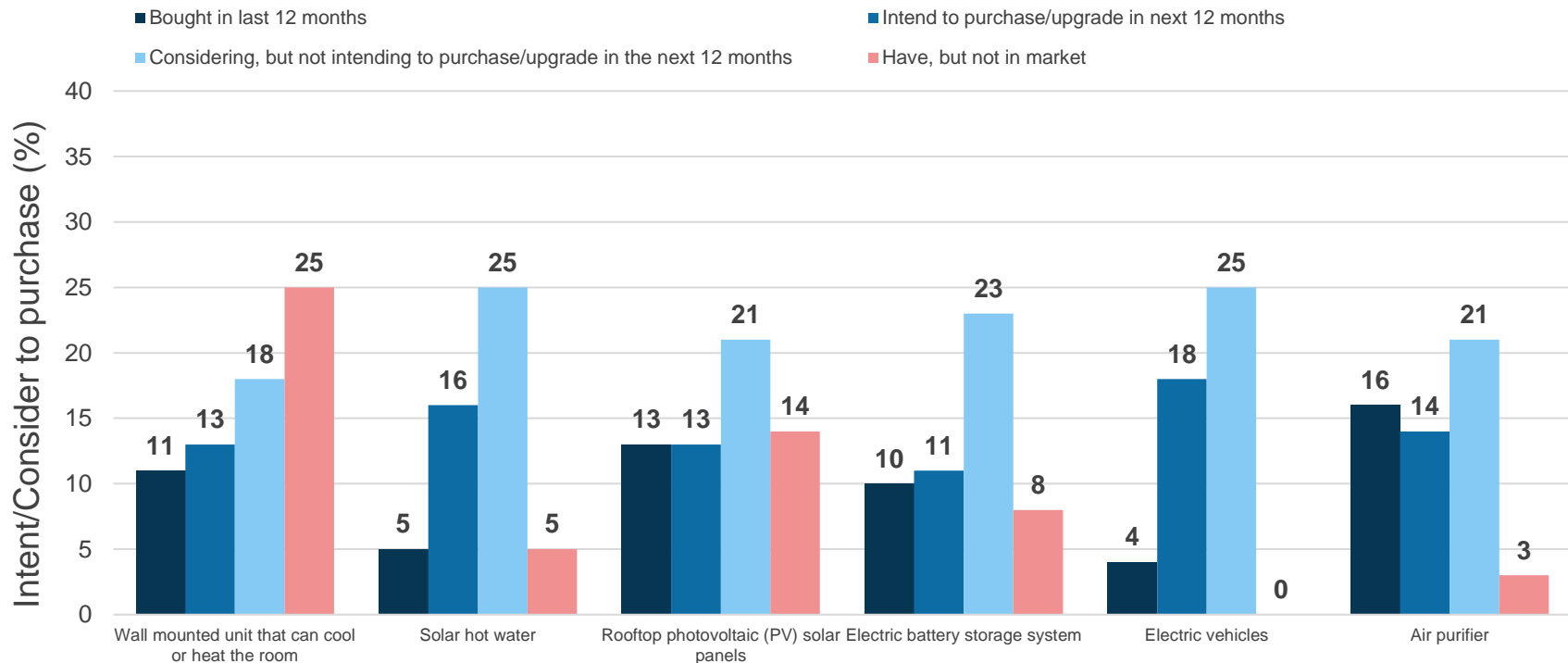
Q: Which of the following technology do you have in your household, and which do you use to help control your energy costs?
 Base size: All businesses operating from home/mobile locations (n=279)

Upgrade & Intention to purchase

- For fixed location businesses, appliances most likely to be purchased in the next 12 months are electric vehicles (18%) and solar hot water (16%).
- 9% of businesses operating from home/mobile locations are considering purchasing solar panels in the next 12 months.
- 11% of fixed location businesses are intending to purchase a battery storage system in the next 12 months, with a further 23% considering this option in the future. Battery storage is less of a priority for businesses operation from home/mobile locations, with 7% intending to purchase in the next year.



Upgrade & Intention to purchase: Heating and efficiency appliances



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

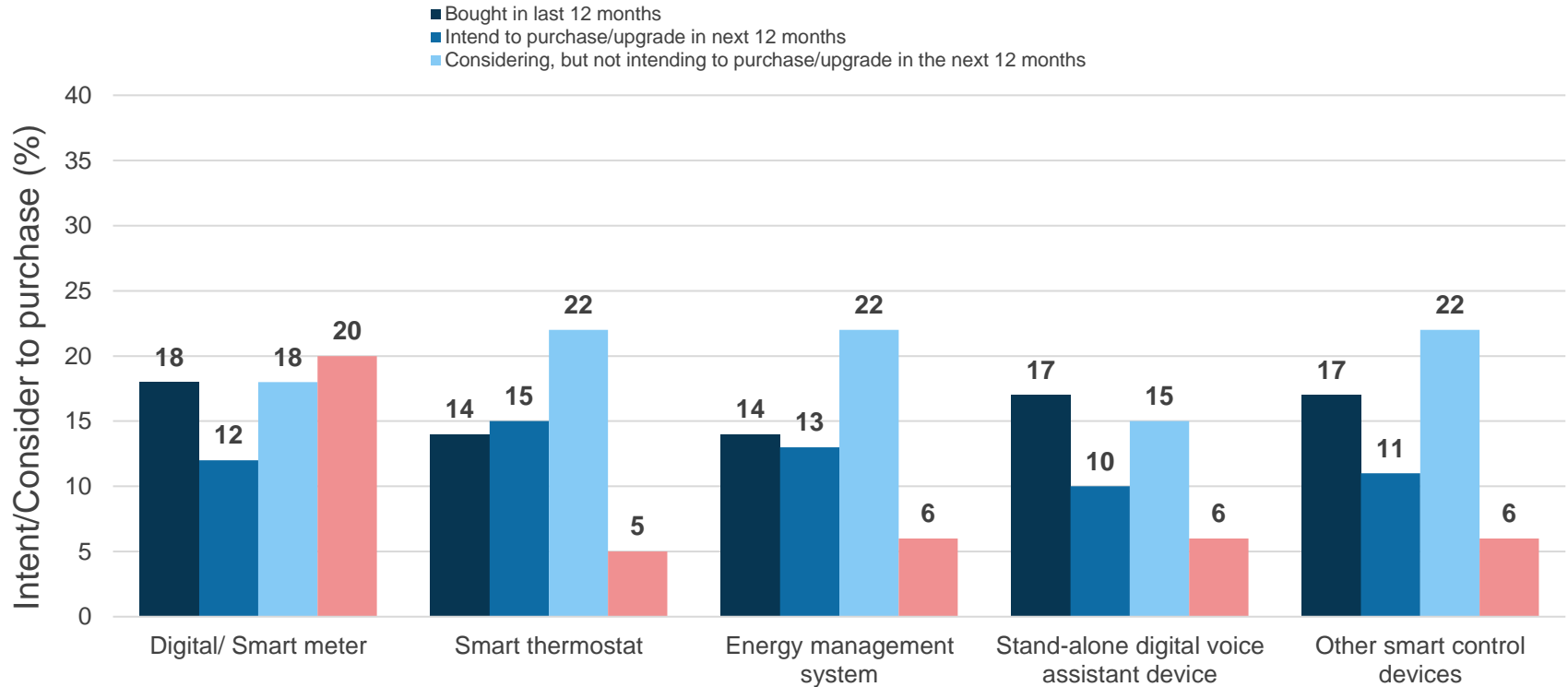
Q: Which of the following are you intending to replace or upgrade in your place of business?

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

Base size: All businesses in fixed location (n=236)

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

Upgrade & Intention to purchase: Smart Devices



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

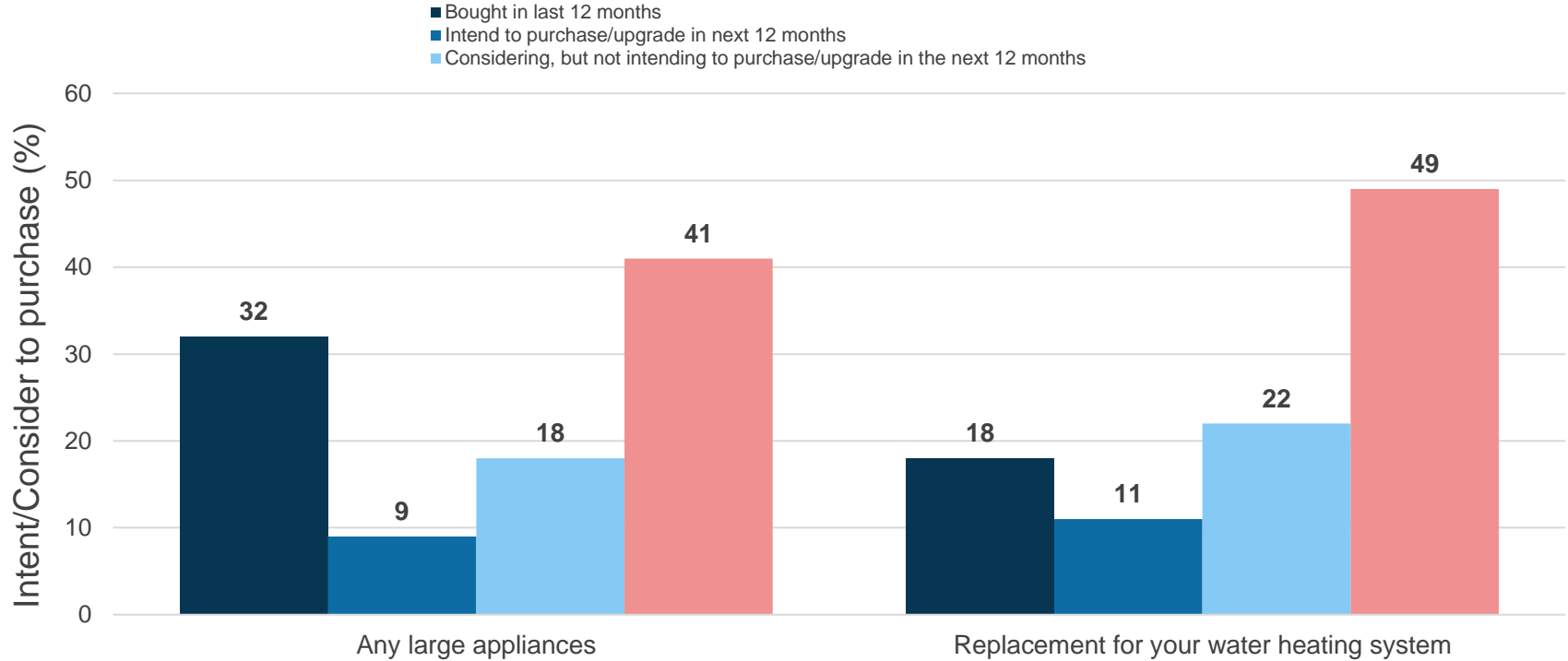
Q: Which of the following are you intending to replace or upgrade in your place of business?

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

Base size: All businesses in fixed location (n=236)

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

Upgrade & Intention to purchase: Replacements



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

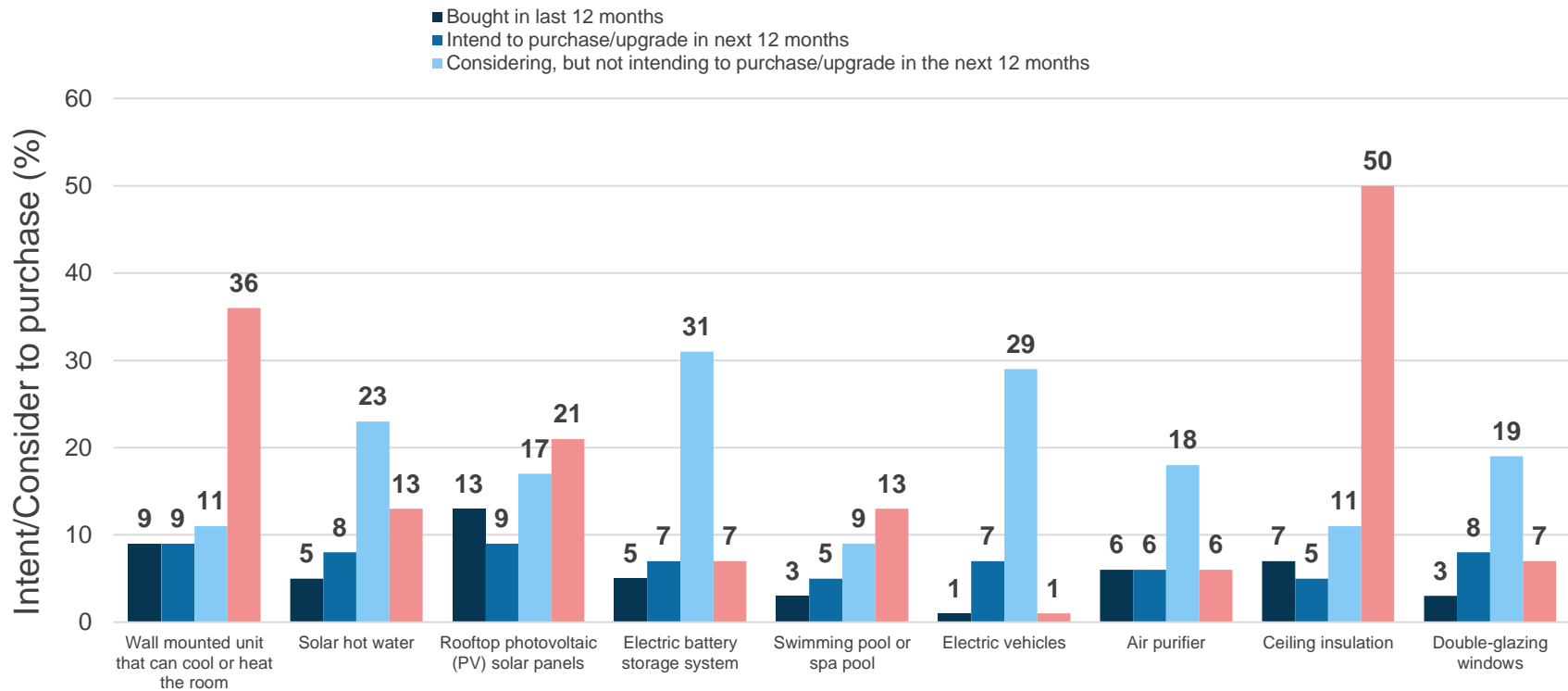
Q: Which of the following are you intending to replace or upgrade in your place of business?

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

Base size: All businesses in fixed location (n=236)

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

Upgrade & Intention to purchase: Heating and efficiency appliances



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

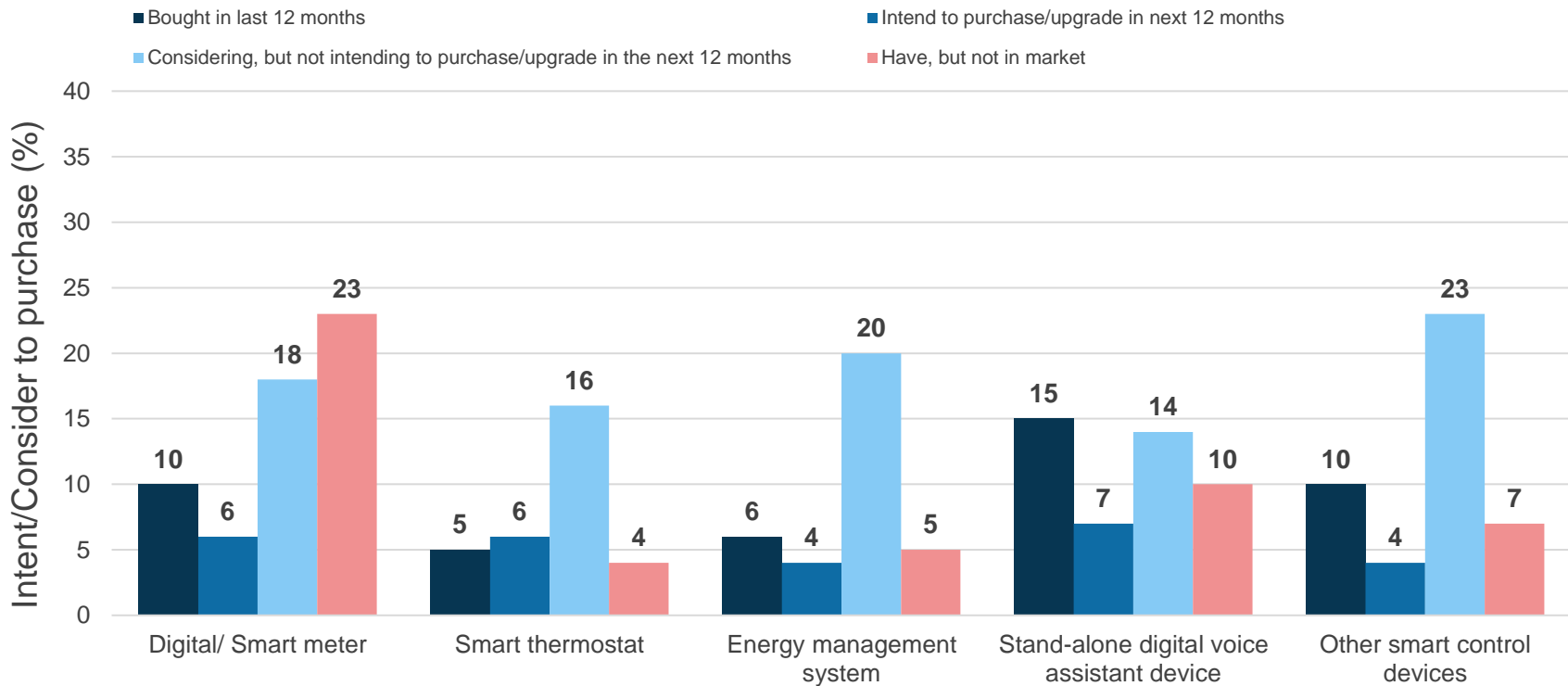
Q: Which of the following are you intending to replace or upgrade in your property?

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

Base size: All businesses operating from home/mobile locations (n=279)

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

Upgrade & Intention to purchase: Smart Devices



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

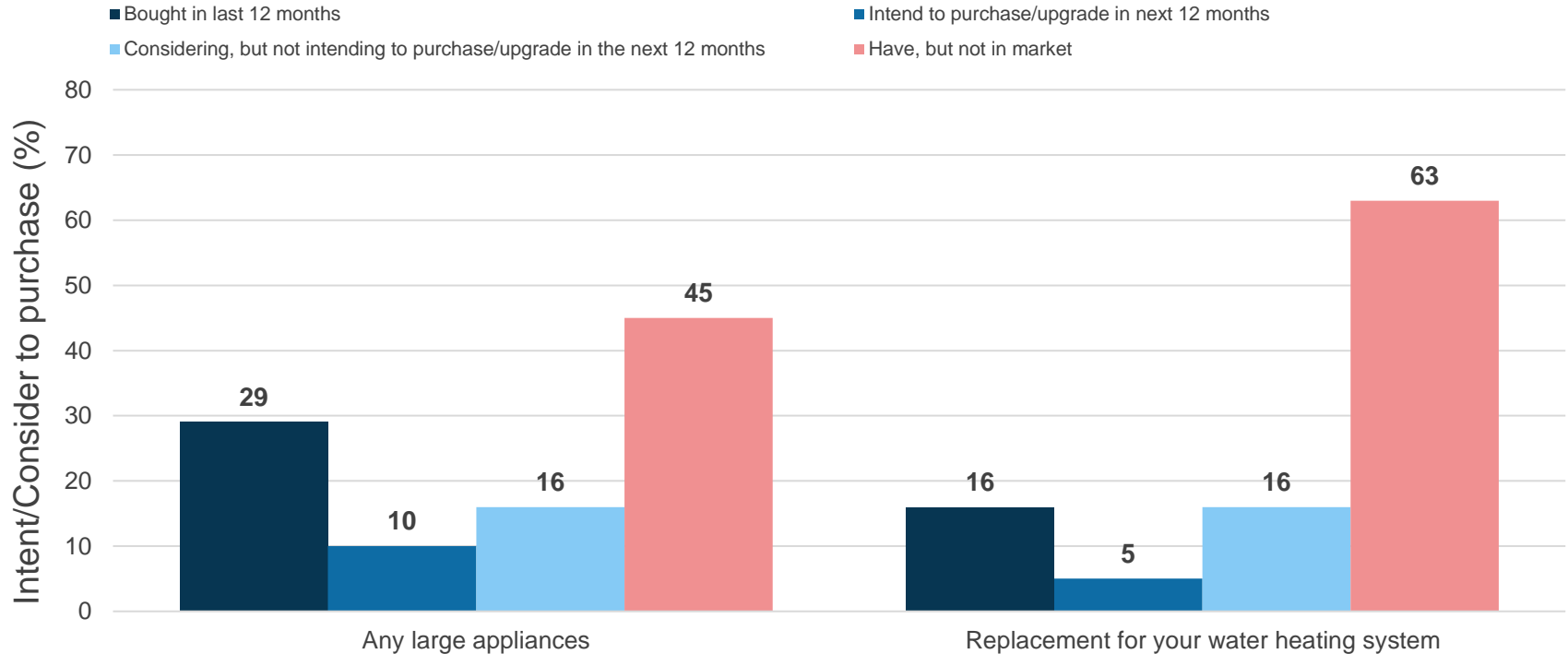
Q: Which of the following are you intending to replace or upgrade in your property?

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

Base size: All businesses operating from home/mobile locations (n=279)

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Upgrade & Intention to purchase: Replacements



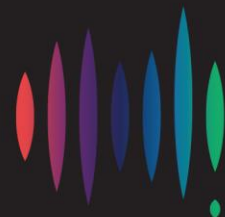
Q: Did you purchase or have this appliance or system installed in the last 12 months?

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

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

Base size: All businesses operating from home/mobile locations (n=279)

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



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