Energy Efficient Housing Research

Prepared for Energy Consumers Australia & RENEW | August 2022

Prepared for:

Prepared for:

Kerry Connors
Director, Policy (Energy Inclusion)
E kerry.connors@energyconsumersaustralia.com.au

T 0407 848 572

Prepared by:

Rob McLeod
Sustainable Housing Advocate
E rob.mcleod@renew.org.au

T 0402 318 842

Prepared by:

Heather Jones
Senior Director

E Heather.Jones@secnewgate.com.au

Alexis Polidoras
Associate Director

E Alexis.Polidoras@secnewgate.com.au

David Stolper
Strategic Advisor

E David.Stolper@secnewgate.com.au

T 0422 472 596

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Executive Summary (1)

This report provides detailed findings from a comprehensive program of qualitative and quantitative research conducted between April and July 2022 with Australian adults to explore perceptions of energy efficiency, energy efficiency upgrades and reactions to proposed energy efficiency (EE) reforms.

The research comprised 20 focus groups and a 20-minute online survey with a nationally representative sample of n=2,010 adults.

Energy Efficiency

The benefits of energy efficient homes are sought:

- Participants discussed energy efficient features when describing their ideal place to live - natural light, good airflow and a constant, comfortable living temperature with minimal energy use.
- There is also wide acknowledgement that these features bring a range of benefits for health, wellbeing and power bill savings and the COVID lockdowns have served to bring these considerations to the fore.

But many link energy efficiency to expensive modifications rather than low-cost additions:

- When this topic was explored in the focus groups, participants linked it most readily to expensive purchases and alterations such as solar PV, batteries, energy efficient appliances and to structural modifications.
- These perceptions position energy efficiency as desirable but financially out of reach for many.

Only a minority of participants consider themselves to be living in a highly energy efficient home:

- Fewer than one-third rate the energy efficiency of their home as 8 or higher out of 10. An average rating of 6.0 out of 10 (on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent').
- Tenants and the financially vulnerable rated their homes significantly lower than homeowners and landlords.
- There appears to be an opportunity to take people on the journey in relation to low-cost energy efficiency improvements that deliver bill savings as:
  - The vast majority of participants (82%) say they are very concerned about the rising cost of living, specifically power bills, rent and mortgage rates.
  - Only just over half had installed or were actively considering block-out blinds (58%) or ceiling insulation (56%);
  - Only two-in-five had installed or were actively considering window shading (39%) or draught proofing (38%); and
  - Fewer than one-third had installed or were considering window film (28%).

Executive Summary (2)

Reactions to Reforms

When presented with the idea of government reforms for energy efficiency, the majority of participants are supportive:

- Exploration of this topic in the focus groups revealed perceptions that energy efficiency standards for Australian homes are low and there is desire for government mandated measures to raise them.
- Two-thirds of survey participants said they support the Australian government improving building standards for new homes and renovations (71%) and in rolling out programs to improve the energy efficiency of existing homes (72%). Fewer than one-in-ten are negative.
- Participants consider these reforms will help bring the building industry in-line, reduce sub-standard work and help households save on power bills.
- Landlords and those who have recently undertaken major work showed significantly lower levels of support.

Lack of clarity about what implementation of the reforms might entail raised concerns that it:

- Would be costly for householders to action the changes. Particularly those with older homes; and
- Might increase the regulatory burden and delays for building work and renovations.

Two-thirds of tenants didn't think their landlord would support them in making the changes.

When presented with the six proposals underpinning the reforms, most were supportive:

%	Support	Oppose
1. 7-star thermally efficient new homes	73%	3%
2. Improving EE standards for renovations	70%	5%
3. Improving standards for rental homes	70%	7%
4. Mandatory EE disclosure	66%	8%
5. Social housing retrofits	73%	6%
6. Incentives for homeowners	75%	5%

- The provision of incentives and social housing programs received high levels of support (75% and 73% respectively). A focus on improving standards for new homes was also well supported (73%).

Opinion was slightly more mixed on measures that could potentially backfire on householders:

- Rental home standards (70% in support) raised concerns that tenants would be forced to absorb rental increases.
- Mandating disclosure of EE ratings (66% in support) raised concerns that those unable to afford to make the necessary changes may be penalised through lower sale values or rents.

Sentiment expressed in the groups around the roll out of the reforms indicated a preference for a slower, staged rollout of changes for existing properties and for there to be different requirements for different ages/ types of property.

Landlord attitudes to the reforms were mixed:

Landlords were also mixed in their opinion on whether they would raise rents for their tenants 15% said they definitely would, 34% said they probably would and 32% were unsure.

Several landlords in the groups mentioned the financial and administrative burden of current regulations and fears that the reforms would make it worse. They were reasonably positive of some of the potential support measures tested in the survey:

- A deduction on their tax bill (63%)
- A free energy assessment (60%)
- Low/no interest loans (57%)
- Grants (55%)

Landlords would want to see more information on what was being proposed, to access support and to have an extended timeframe to make changes.

A range of potential sources for information about the Reforms were cited by participants.

Those most commonly mentioned by survey participants were: An independent regulator (29%); CSIRO (28%); Energy Consumers Australia (23%); State (20%) and Federal Government (19%)

Local councils were also mentioned as a potential information channel by some group participants.

Several participants in the groups expressed a desire to see real life case studies and information on the success of social housing rollouts to help them understand what they need to do, how easy it might be and the returns they might get.

Introduction

Background & Objectives

Most existing homes in Australia perform poorly when it comes to energy efficiency, which has significant costs for power bills, carbon emissions and the comfort and wellbeing of residents.

To address the barriers people encounter in improving the energy efficiency of their homes, government policy action to establish and raise minimum standards, incentivise for change and target retrofitting is needed.

This program of research aims to build a robust and nuanced understanding of the knowledge, needs and expectations of Australians in relation to energy efficiency.

Specifically, this research aims to:

- Establish how engaged with and knowledgeable Australians are about the topic of energy efficiency:
  - Whether the energy efficiency of their home or a new build is a consideration for them and whether they talk about it directly or indirectly in the form of issues, experiences and expectations on relevant topics such as temperature and air quality;
  - The impact of the pandemic lockdowns on their experiences, needs and expectations; and
  - Awareness and implementation of energy efficiency measures.
- Understand community attitudes to a broader range of potential policy areas including retrofits, minimal rental standards and disclosure requirements.

NGR2111008 Energy Efficient Housing Report

Approach

A comprehensive, national qualitative and quantitative program of research comprising 20 focus groups and an online survey with a nationally representative sample of n=2,010 residential energy consumers to represent a cross-section of jurisdictions, climate zones and homes in regional and metropolitan areas. This report details all findings from the consumer research.

Moderators: David Stolper, Heather Jones, Alexis Polidoras, Megan Price

Establishment workshop

Background briefing on the reforms by the client team.

Project set up, approach finalisation and materials development.

Part 1 Qualitative Research

14 x 1.75hr focus groups across 4 states/ territories in regional and metro areas.

All participants were sole/joint decision-makers for household finances and energy related matters.

A mix of audience segments across groups. Mix of gender, age, household type, ethnicity and SES within groups.

9 participants recruited to each group with an average of 7 participants per group. Participants incentivised for participation.

Conducted 26th April to 5th May 2022.

Part 2 Qualitative Research

6 x 1.75hr focus groups across 3 states.

All participants were sole/joint decision-makers for household finances and energy related matters.

A mix of audience segments across groups. Mix of gender, age, household type, ethnicity and SES within groups.

9 participants recruited to each group with an average of 7 participants per group. Participants incentivised for participation.

Conducted during w/c 26th May 2022.

Quantitative Research

20-minute online survey with a nationally representative sample of n=2,010 Australian adults comprising:

- n=1,694 nationally representative with quotas set on age, gender and location to represent a cross-section of the Australian adult population; and
- n=316 targeted boost of those planning a new-build/renovation N2Y and/or having undertaken one L5Y.

Data was weighted at the analysis stage to correct for any over or under-sampling.

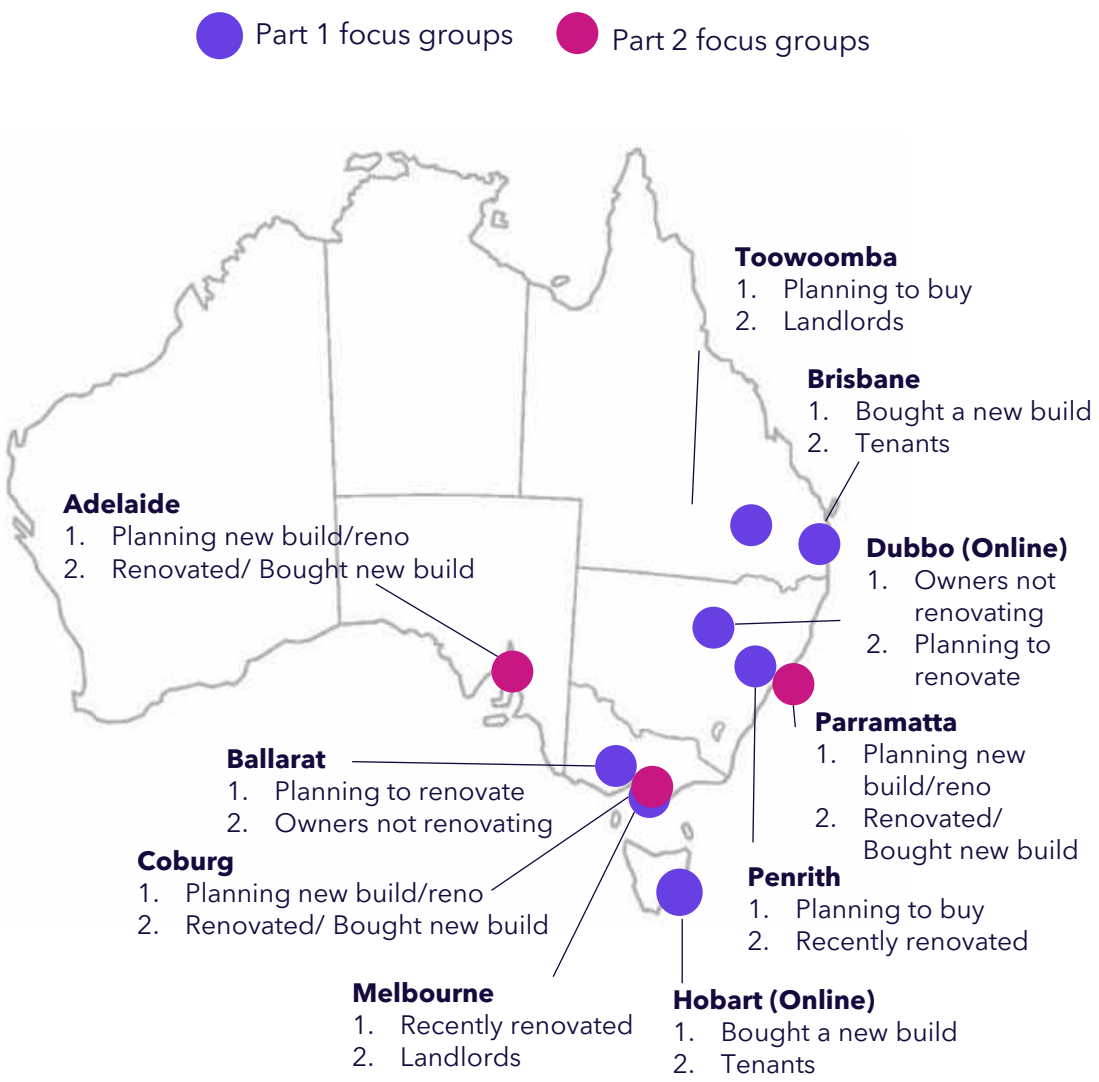
Conducted between 28th June and 11th July 2022.

N2Y = Next 2 Years
L5Y = Last 5 Years

Sample – Qualitative Focus Groups

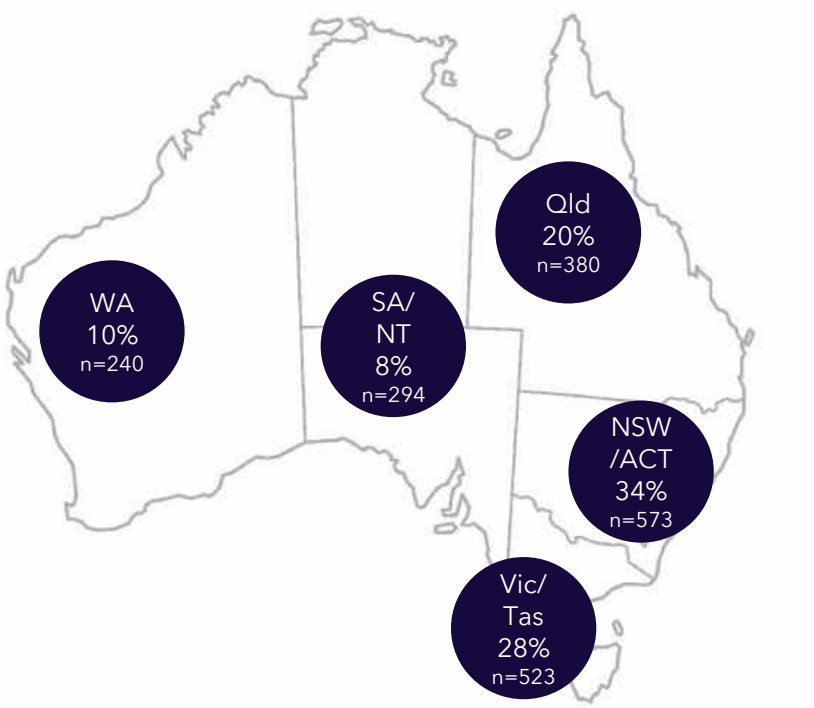
Segment	Description
Planning a new build	Owners/ renters who are actively planning to build a brand-new residential property within the next 2 years
Completed a new build	Owners who have built a brand-new residential property in the last 5 years
Planning a major renovation	Owners who are actively planning a major renovation of a residential property within the next 2 years that will alter the envelope of the property
Completed a major renovation	Owners who completed a major renovation of a residential property within the last 5 years that altered the envelope of the property
Owners <u>not</u> undertaking / planning any work	Owners who have not undertaken nor plan to undertake a major renovation or commission a new build in the timeframes above
Tenants	Those currently renting their home and who are not actively planning to commission a new build within the next 2 years
Residential landlords	Owner and landlord of a residential property they privately lease to tenants

Group Locations



Sample – Quantitative Survey

Attribute	n=	Weighted %
Male	964	49%
Female	1046	51%
Aged 18-34	636	30%
Aged 35-49	546	26%
Aged 50-64	445	24%
Aged 65+	383	20%
Single/Couple only household	942	48%
Children under 18 at home	606	27%
Other living arrangement	462	25%
Identifies as Aboriginal or Torres Strait Islander	131	6%
Speaks a language other than English	334	17%
Lives in a freestanding house	1352	67%
Lives in a semi-detached, terrace or townhouse	299	14%
Lives in an apartment or unit	359	20%
Lived in current property for less than 6 years	1002	48%
Lived in current property for 6 years +	1008	52%
Owns home outright	617	32%
Paying off mortgage	580	27%
Renting	743	38%
Residential Landlord	436	20%
Full time employed/Self-employed	835	40%
Part-time employed/Casual	387	18%
Retired/not working/student/home or carer duties	788	42%



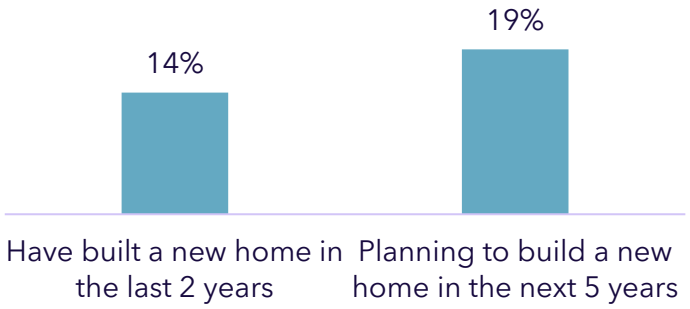
Attribute	n=	Weighted %
Lives in Major City (Inner/Middle Suburbs)	873	47%
Live on Outskirts of Major City	565	29%
Lives in Regional Centre	276	11%
Lives in Regional/Remote area	296	13%

Base: All participants (n=2,010)

Key Segments in the Sample

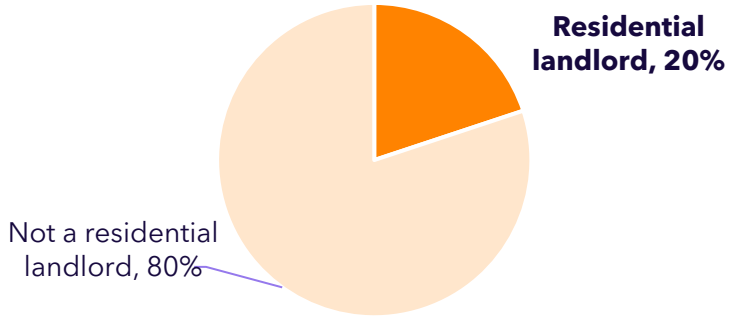
Broadly in line with ABS statistics, one-in-five participants were landlords and one-in-three were tenants, and one-third were undertaking or had completed a new build or major renovation

Builders (27%)



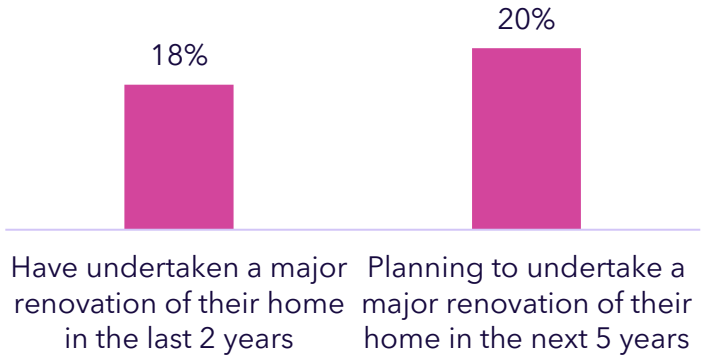
18% of Builders are planning to sell a property within the next 3 years and 19% are planning to buy

Landlords (20%)



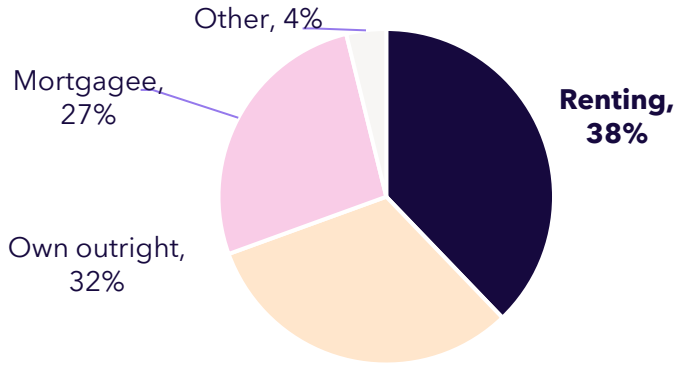
19% of Landlords are planning to sell a property within the next 3 years

Renovators (29%)



18% of Renovators are planning to sell a property within the next 3 years

Tenants (38%)



26% of Tenants are planning to buy a property within the next 3 years

S6. Have you done any of the following things in the last 2 years?
S7. How likely are you to do any of the following things within the next 5 years?
S8. Do you own or rent the home you live in? S9. Are you the landlord of a residential property in Australia that is leased to tenants?
D4. Do any of the following apply to you? Base: All participants (n=2,010).

How People are Currently Living

Self-assessed energy efficiency, comfort and state of repair of people's homes

Features Sought in a Good Place to Live

When explored in the focus groups, participants focused on a comfortable living temperature, passive lighting/heating and airflow and ladder these into compelling benefits for lower power bills, better health and wellbeing. There is also awareness of the importance of insulation and draught proofing to achieve a more constant temperature

	An easily maintained comfortable living temperature	Sunlight/ natural light	Space & a good layout	No damp & mould
Desired feature	Most participants mentioned the importance of having a cosy home that is not too hot in summer, not too cold in winter and which requires minimal heating and cooling.	A light filled property was considered an important feature by most participants.	Most participants desired a space that balanced a sense of privacy with room sizes that were not too big to heat. Some talked about the importance of the layout of the rooms in the property, both to facilitate better air flow and to enforce good behaviours (e.g. a kitchen slightly out of the way to decrease urge to snack).	Some participants considered this to be a major health risk and to be a particular problem for those in cheaper rentals and social housing.
End benefit	Minimising heating bills. In addition, several participants talked about the psychological and health benefits of living life in a constantly comfortable and cosy environment.	Saving on lighting bills Better mental health from receiving light and allowing the outdoors in (several mentioned this). Others felt that a well-lit property could help to eliminate damp and mould, resulting in better health.	Saving on heating and cooling bills In addition, space and layout was felt by many to help optimise air quality for better health and wellbeing.	These participants recognised the health benefits of a dry, mould-free home (i.e. fewer respiratory issues) and could link this to better wellbeing and mental health.
How to attain it	Several participants mentioned the role of insulation, draught-proofing and glazing in helping achieve this.	As well as having more windows and skylights, some commented that an appropriately orientated building could help passive heating and cooling. Those in warmer areas also talked about appropriate use of shading to minimise energy bills.	This was felt by participants to be dependent on the structure and orientation of the home and therefore very expensive to achieve.	Most participants linked good air flow within the property to good air quality and a drier environment. However, several felt that this could only be achieved through structural changes to increase air flow.

Unprompted feedback from phase 1 focus group participants (n=100)

The Impact of the Pandemic Lockdowns

The pandemic brought the cost of heating and cooling homes into sharp focus with lockdowns and work-from-home leading to rising bills and making people more aware of how much energy they need to use to stay warm/ cool

The lockdowns also:

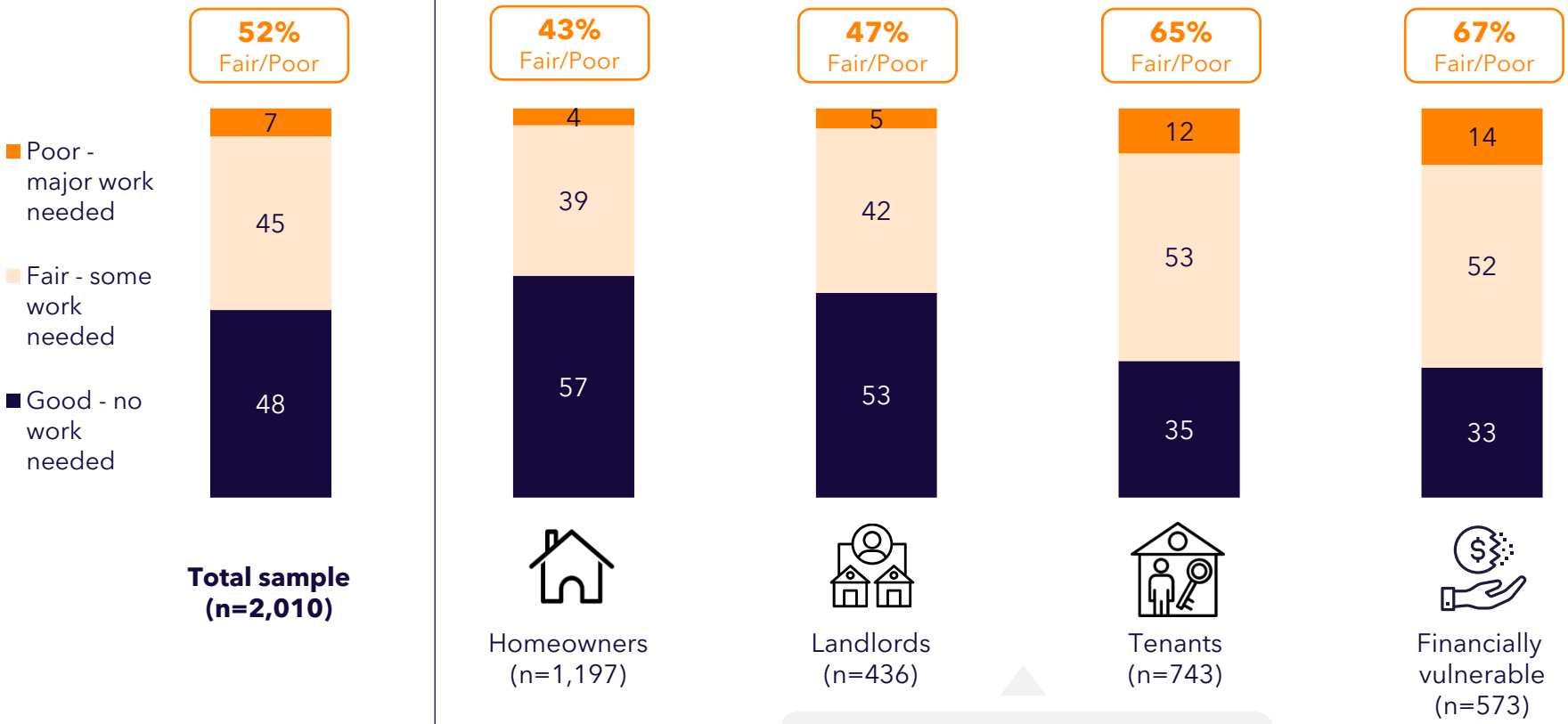
- **Led to people reassessing their living space** and the importance of separate work/study areas and comfortable areas to relax at home. *"You know that room they say is a study, but in reality, you have as a bedroom…well it's a study now."* (Penrith)
- **Raised the importance of managing good air quality and airflow:** Several participants talked about creating cross-ventilation and installing fans and air purifiers to combat airborne pathogens (COVID, mould and toxins) and to deal with respiratory conditions.
- **Reinforced the importance of good outdoor areas to promote health and wellbeing:** Some participants spoke of their joy in growing their own produce, having grassy space for kids to run around and gardens which has brought them closer to nature.

Unprompted feedback from phase 1 focus group participants (n=100)

Perceived Current State of Repair of Own Home

Opinions were mixed, with half considering that some improvements are needed. Tenants and the financially vulnerable participants were significantly more likely than landlords to say their own home was in a fair or poor state of repair

State of repair of home – self-ascribed (%)



Tenants were significantly more likely than **Landlords** to be living in homes in a fair or poor state of repair

D2. Which of these best describes the home you live in?
D5. Which of the following best describes the state of repair of your home?
Base: All participants (n=2,010).

Participant Perceptions of their Home

On average participants rate the energy efficiency of their home as 6 out of 10 (on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent')

However, there is a lot of variability as fewer than one-third of participants rate their home's energy efficiency as excellent (8 or more out of 10). Generally, participants rate the energy efficiency of their *own* home as higher than Australian homes as a whole

THE ENERGY EFFICIENCY OF THEIR HOME

Rated 6.0 out of 10 on average

28% Rating 8+

HOW WELL THEIR HOME MAINTAINS A COMFORTABLE YEAR-ROUND TEMPERATURE

Rated 5.9 out of 10 on average

30% Rating 8+

THE ENERGY EFFICIENCY OF ALL AUSTRALIAN HOMES

Rated 5.6 out of 10 on average

19% Rating 8+

HOW THEIR HOME PERFORMS ON REQUIRING MINIMAL HEATING AND COOLING

Rated 5.9 out of 10 on average

28% Rating 8+

Q6. How would you rate the following? Scale of 0-10, where 0 = Very Poor and 10 = Excellent
Base: All participants (n=2,010). Full data is in the appendix

Participant Perceptions of their Home – by Segment

Builders, renovators and landlords rated their homes and Australian homes in general more highly on energy efficiency aspects than tenants and vulnerable households

Ratings provided on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'

	Total sample		Builders (Planning/ done)		Renovators (Planning/done)		Planning to Build or Renovate		Landlords		Tenants		Financially vulnerable	
Sample size (n=)	2,010		649		694		673		436		743		573	
	Average	Rated 8+	Average	Rated 8+ (%)	Average	Rated 8+	Average	Rated 8+	Average	Rated 8+	Average	Rated 8+	Average	Rated 8+
The energy efficiency of their home	6.0	28%	6.8	43%	6.6	39%	6.6	39%	6.6	39%	5.3	22%	4.7	13%
The energy efficiency of all Australian homes	5.6	19%	6.4	33%	6.2	29%	6.3	30%	6.2	30%	5.3	17%	4.7	9%
How well home maintains a comfortable year-round temperature	5.9	30%	6.7	41%	6.7	41%	6.7	41%	6.6	41%	5.3	22%	4.6	14%
How home performs on requiring minimal heating/ cooling	5.9	28%	6.8	40%	6.7	40%	6.7	39%	6.6	39%	5.2	20%	4.6	12%

Other subgroups more likely to rate the energy efficiency of their homes as 8 or more out of 10: those aged over 65 (37%), living in inner or middle suburbs of a major city (32%), homeowners (33%), families with children under 18 at home (34%) and high-income households (35% of those earning over $130k).

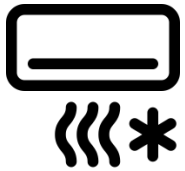
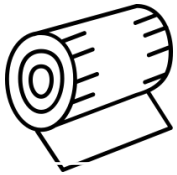
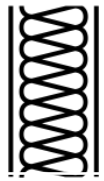
Q6. How would you rate the following? Scale of 0-10, where 0 = Very Poor and 10 = Excellent. Base: All participants (n=2,010). Full data is in the appendix

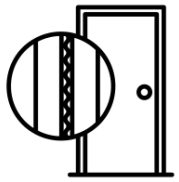
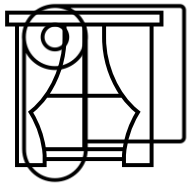
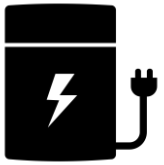
Significantly higher than the other sub-group (i.e. those who are not builders, not tenants etc) @ 95%

Significantly lower than the other sub-group @ 95%

Energy Efficiency Features Installed/Planned

Beyond LED bulbs, A/C, ceiling insulation and block-out blinds, only a minority of participants have installed or are planning to install many of the energy efficiency features tested

	 LED bulbs	 A/C reverse cycle	 Ceiling insulation	 Block-out curtains/blinds	 Wall insulation	 Window shading
Have it	60%	51%	48%	44%	33%	29%
Actively planning to	11%	9%	8%	14%	8%	10%

	 Solar panels	 Draught proofing	 Window film	 Glazing	 Under floor insulation	 Home battery	 Electric Vehicles
Have it	29%	27%	17%	12%	10%	6%	5%
Actively planning to	12%	11%	11%	10%	7%	12%	12%

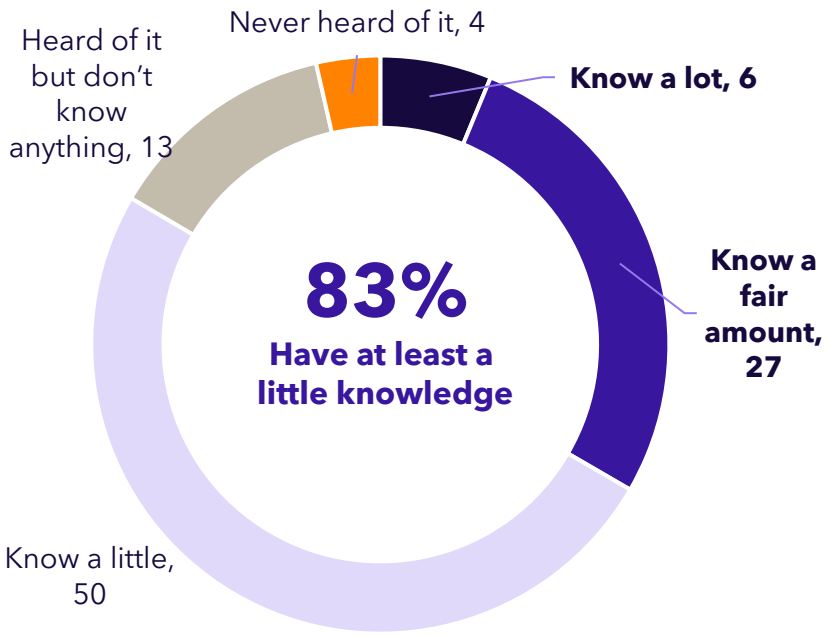
Tenants and **financially vulnerable households** were significantly less likely to already have or be actively planning to install any of these measures, compared to other segments.

Q7. Does the home you live in have the following features fitted or are you considering buying/installing them within the next two years? Full chart in appendix
Base: All participants (n=2,010)

Energy Efficiency – Knowledge & Perceptions

Four-in-five participants are aware of the term Energy Efficiency. However, only one-third claim to have much knowledge of what it means (know a fair amount or a lot). Tenants and vulnerable households had significantly lower levels of knowledge than landlords and homeowners

Rating of knowledge of the term energy efficiency (%)



Most knowledgeable (Fair / a lot of knowledge)	Least knowledgeable (Unaware / aware only)
• **Males** (39% vs. 28% females)	• **Females** (20% vs. 13% males)
• **People living in NSW/ACT** (39% vs. 31% other states/ territories)	• **Tenants** (20% vs. 13% house owners)
• **People living in major city** (39% vs. 28% other locations)	• **Non-landlords** (18% vs. 10% landlords)
• **House owners** (38% vs. 28% tenants)	• **Vulnerable households** (23% vs. 14% vulnerable)
• **Landlords** (56% vs. 28% non-landlords)	
• **Family with kids** (40% vs. 31% households with no kids)	
• **Non-vulnerable households** (38% vs. 21% vulnerable)	
• **Those who have already (57%) or are planning to build / renovate (48%)** vs. 24% among others	

Q5. How much would you say you know about the topic of home energy efficiency? (**Asked prior to seeing a definition of the term**)
Base: All participants (n=2,010) Unprompted feedback from phase 1 & 2 focus group participants (n=150)

An Energy Efficient Home – Knowledge & Perceptions

Most link energy efficiency to lowering energy consumption through use of solar, batteries and energy efficient appliances rather than minimising loss of energy through lower-cost solutions such as insulation/ draught proofing

KEY ASSOCIATIONS (FROM THE FOCUS GROUPS)

The term 'Energy Efficiency' was familiar to most, everyone understood it to some degree and could link it to using less energy.

- Several participants could talk about the potential benefits of an energy efficient home:
  - **Cost saving and bill reduction** which were are also spoken of in the context of the rising cost of living concerns.
  - **Environmental benefits:** These were secondary to bill savings as a priority, but some did speak of their duty to the environment, climate change and the importance of doing their bit for future generations.
- Some participants spoke of their own experiences with energy efficient homes that did not require heating or cooling and this piqued interest among other participants.

Most associated energy efficiency with LED lighting and energy efficient appliances, with several participants mentioning looking at the star-ratings of appliances when deciding what to purchase.

Several participants linked it to more costly solutions like solar power and batteries.

For others, this term connoted a broader range of sustainability initiatives such as green energy, recycling and water saving.

Lower cost solutions such as draught proofing and window fittings were only mentioned by a few participants:

- When discussed, there was a sense from participants that lower-cost solutions may not deliver significant cost savings compared to (expensive) technological and structural modifications.

"It's about light and insulation. Energy efficient means it's built in a way that we don't need to rely on energy that is generated by power e.g. use of solar, rainwater tanks, appliances in the house that are more cost effective." ***(Hobart)***

"It's more important now, there's more discussion on climate change. Fifteen or twenty years ago it wasn't as much, and the only reason we wanted to be efficient was cost." ***(Ballarat)***

"I always think of expense when I hear the term 'energy efficient.'" ***(Toowoomba)***

"It stays cool in summer and warm in winter without additional resources. I think of insulation, solar, batteries, star ratings and low running costs." ***(Melbourne)***

Feedback from phase 1 & 2 focus group participants (n=150)

Is 'A Comfortable Home' a Better Term to Use?

More participants consider their home to be comfortable to live in than rate their home as energy efficient. 'Comfortable' is primarily linked to space, layout, storage and convenience. Some participants linked it to a comfortable temperature year-round

HOW COMFORTABLE THEIR HOME IS TO LIVE IN

6.8	42%
on average	Rating 8+

KEY ASSOCIATIONS (FROM THE FOCUS GROUPS)

While the term was familiar, the immediate associations were with:

- **The functionality of the home,** specifically features such as space and storage, as well as being low maintenance (i.e. easy to clean).
- **Their sense of vitality and peace,** strongly linked to having lots of natural light, windows, fresh air, gardens and a nice view.
- **Some participants talked about a 'cosy' home in this context - one that was warm in winter and cool in summer.** An easily maintained comfortable temperature was desirable, but the relationship to thermal efficiency and energy efficiency was not overt.
    - An insulated and warm home was particularly important in cooler climates such as Hobart and Ballarat although some noted that these places also have hot days as well.
- While desirable, there is a sense from some participants that a comfortable home connotes **luxury** and that this is more of a 'nice to have'.

"Spacious, inviting, relaxing. It's somewhere you can come home and just forget about the day." ***(Toowoomba)***

"It's not cluttered or cramped, there's ample storage space and a nice open plan kitchen area for open communication." ***(Ballarat)***

Q6. How would you rate the following? Scale of 0-10, where 0 = Very Poor and 10 = Excellent
Base: All participants (n=2,010). Full data is in the appendix

Unprompted feedback from phase 1 focus group participants (n=100)

Is 'A Healthy Home' a Better Term to Use?

A greater number of participants rated their home as Healthy than rated it as Comfortable. The idea of a healthy home is linked to air quality, ventilation, mental and physical wellbeing. It is potentially interesting as a supporting message for the benefits of an energy efficient home

HOW HEALTHY THEIR HOME IS TO LIVE IN

6.8	42%
on average	Rating 8+

KEY ASSOCIATIONS (FROM THE FOCUS GROUPS)

A healthy home ladders most strongly into air quality and hygiene – particularly after COVID-19. The concept of a home that maintained a comfortable temperature was mentioned by a few.

Key themes included:

- **Air quality and ventilation**, with a need for fresh air and good airflow throughout the home.
- **Mitigation of health risks** including off-gassing or toxic materials (furnishings, fittings, building materials), asbestos, mould or algae, as well as access to filtered water. Some noted the importance of heating and cooling to maintaining good health.
- **Access to nature**, through greenery, plants, a garden, veggie patch and lots of natural sunlight.
- **There was a strong emphasis on mental health** (positive mood, wellbeing, peace) as well as the physical elements of health (i.e. avoidance of pathogens).

*"There's less worry and less stress knowing you're coming home to a healthy home." (**Brisbane**)*

*"My first home was very damp because it didn't have good heating. Now I'm very critical of that sort of thing. As soon as we put in ducted heating that fixed the problem." (**Ballarat**)*

Q6. How would you rate the following? Scale of 0-10, where 0 = Very Poor and 10 = Excellent
Base: All participants (n=2,010). Full data is in the appendix

Unprompted feedback from phase 1 focus group participants (n=100)

Do People Relate to Thermal Efficiency?

In the focus groups we also explored the term 'thermal efficiency'. While unfamiliar to most, it is understood to link to maintaining a comfortable living temperature with minimal energy input. However, it is associated with a very high upfront investment and is felt by many to require costly structural modifications to attain

KEY ASSOCIATIONS (FROM THE FOCUS GROUPS)

- **Most participants were unaware of the term** and those who were aware tended to have knowledge from their professions (i.e., they were builders, engineers, scientists) or were deeply interested or involved in their home design.
  - A few participants who had architecturally designed homes with exceptionally high thermal efficiency ratings talked about the money they were saving on energy use to heat and cool their home and were familiar with the term.
- While more unfamiliar than "energy efficiency", many participants associated it with **maintaining a constant home temperature and a home being easy to heat.**
- **The term does ladder into highly relevant topics such as maintaining a comfortable temperature and reducing heating bills via good insulation**, glazing, reducing air leaks and capitalising on passive heating and cooling through orientation and windows.
- **However, for several participants the term implies a home that is premium and high tech, requiring structural modifications such as glazing and use of insulating building materials,** and hence is seen as expensive to attain.

"Thermally efficient is more focused on heating – that is kind of a subset of energy efficient. It's more about the construction materials and the glazing." ***(Adelaide)***

"Energy efficiency is about things you can do to any home to reduce your carbon footprint and save money on energy bills, while a thermally efficient home is locked in – it's about the structure of the home and you can't readily change that." ***(Parramatta)***

"We're not familiar with the term but it sounds like we're doing it." ***(Toowoomba)***

"It's just about keeping the heat in. Things like door seals to stop the loss of heat or cold air from coming in, planting a deciduous tree outside your window to have more warmth in the window in winter." ***(Melbourne)***

Unprompted feedback from phase 1 focus group participants (n=100)

There is good awareness of the benefits of energy efficient features on living temperature and quality of life, with the pandemic bringing it into sharp focus. However, there is a disconnect between how people want to live and how they are living, with energy efficient improvements underutilised and often considered expensive to implement.

The Current Context

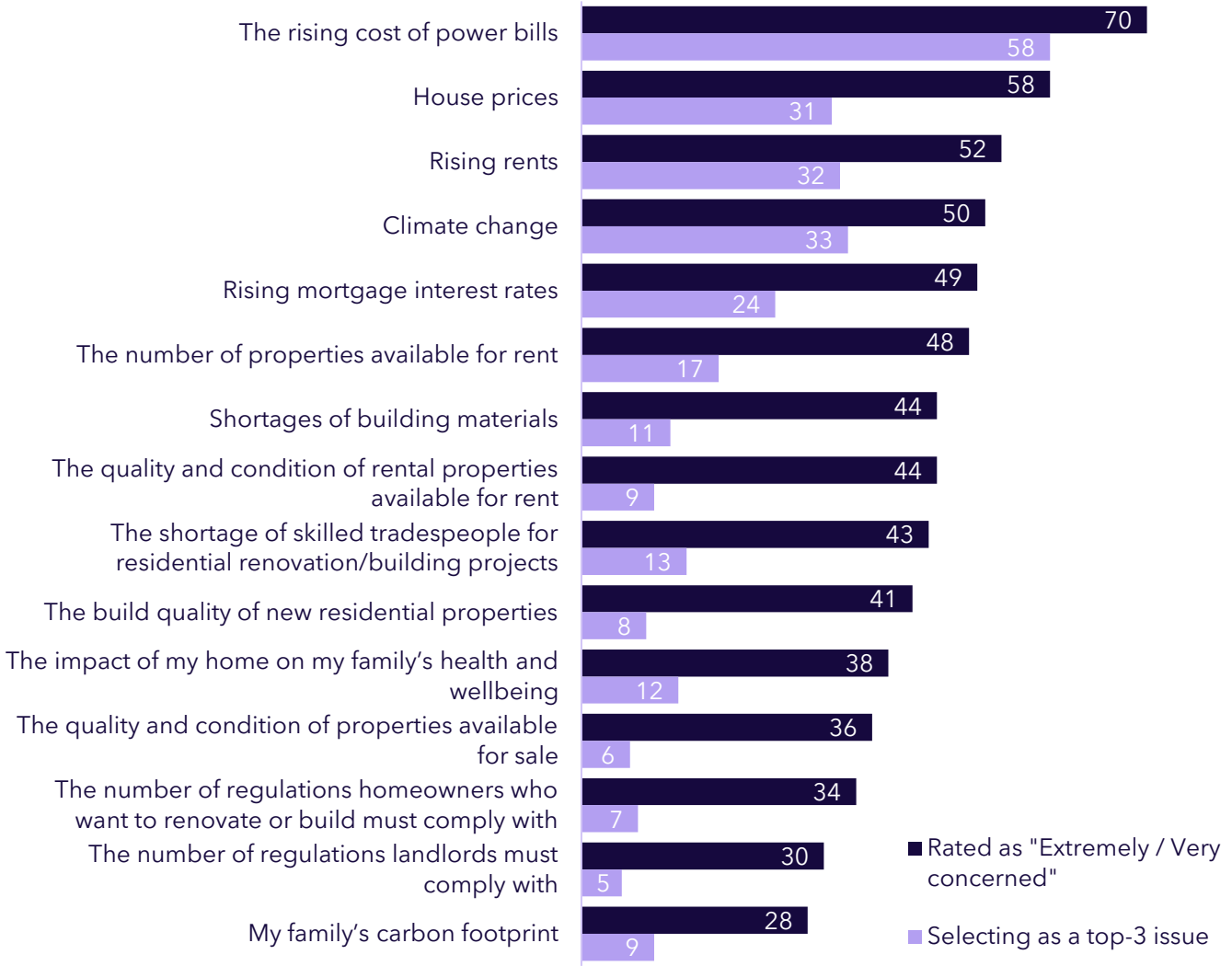
Key issues relating to homes & building

The rising cost of living and climate change are hot button issues. It is essential to recognise these macro factors in positioning the reforms.

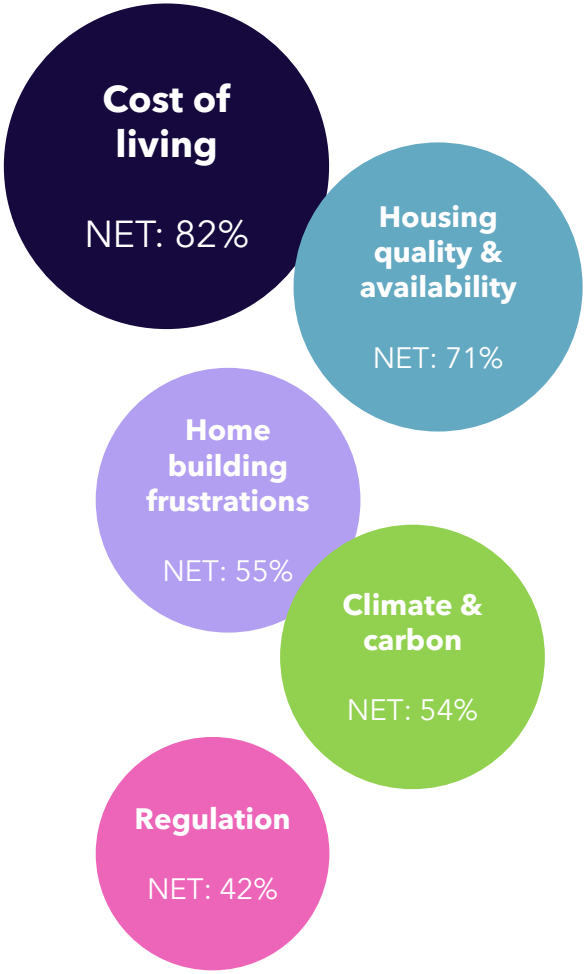
Macro Issues of Most Concern

More than four in five Australians (82%) are concerned with cost-of-living related issues with the rising cost of power bills, house prices and rent of most concern. This is followed by housing quality and availability and climate change

Issues of concern – prompted list (%)



Issues of concern – NET rated as "Extremely or Very concerned"



Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Q2. Please select the 3 issues from the Q1 list that are most important to you at this time
Base: All participants (n=2,010).

Key Macro Issues – The Cost of Living

Cost of living related issues are top of mind and seven in ten (70%) Australians are concerned about rising power bills. They're also feeling the pinch from rising house prices, rents and interest rates. Younger Australians (under 40s), tenants and financially vulnerable households tended to have higher levels of concern about these topics

NET 81% were "Extremely or Very concerned" about cost-of-living related issues:

The Rising Cost of Power Bills

70%

- This was the #1 issue on participants' minds. Every household expenditure was more closely scrutinized and several participants at the focus groups talked of actively seeking ways to lower their energy consumption.
- Survey participants more likely to be concerned:
  - **Older** (73% over 40s vs. 66% of those younger)
  - **Females** (75% females vs. 65% males)
  - **Vulnerable households** (81% vs. 66% non-vulnerable)

how much your electricity bills are going to be. You shouldn't have to go without heating. ***Single mums and pensioners can't afford to buy other things because of electricity bills." (Melbourne)***

House Prices

58%

- Most participants at the focus groups were concerned about rising housing prices which has put the dream of home ownership out of reach for many.
- Survey participants more likely to be concerned:
  - **Younger** (67% under 40 vs. 52% who are older)
  - **Residents in the middle or inner suburbs of a major city** (62% vs. 55% other locations)
  - **Tenants** (66% vs. 52% house owners)
  - **Family with kids** (67% vs. 55% households with no kids)
  - **Vulnerable households** (64% vs. 56% non-vulnerable)

Rising Rents

52%

- Tenants, particularly in regional areas were concerned about rising rents and property availability leading to housing insecurity.
- The situation has been exacerbated by city-dwellers relocating during the pandemic and from the proliferation of holiday rentals.
- Survey participants more likely to be concerned:
  - **Younger** (59% under 40 vs. 48% who are older)
  - **Tenants** (72% vs. 38% house owners)
  - **People living in units** (60% vs. 50% other)
  - **Vulnerable households** (64% vs. 47% non-vulnerable)

Rising Mortgage Interest Rates

49%

- Alongside house price rises, rising mortgage interest rates are stretching household incomes of homeowners still further.
- More likely to be concerned:
  - **Younger** (60% under 40 vs. 42% who are older)
  - **Family with kids** (63% vs. 44% households with no kids)
  - **Higher income households** (59% of those earning more than $130k vs. 43% of households earning under $65k)

"I think we're coming into a really financially scary time for people. ***The interest rates did rise today...*** *I think people are afraid."* ***(Hobart)***

Q1. How concerned, if at all are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010). Full data is in the appendix
Qualitative feedback provided from the phase 1 qualitative research (n=100)

Key Macro Issues – Availability & Quality of Housing

The availability and quality of housing is a top tier issue (71% concerned) and more than a third of participants are concerned by the quality of new builds, the condition of existing homes for sale and impact of their home on health and wellbeing. Again, younger households, those with children, tenants and the vulnerable are most concerned

NET 71% were "Extremely or Very concerned" about availability and quality of housing issues:

The Build Quality of New Homes

41%

- Several participants in the focus groups raised issues about the perceived build quality of new homes. They cited 'inferior' materials such as timber frame construction and brick veneers. A few mentioned issues with black roofs trapping heat and increasing the temperatures inside new homes.
- Others spoke of houses built too close together and being built to the edge of blocks, providing less space for shading foliage and heighted the risk of fire spreading. Some participants, particularly those in parts of NSW that suffered in the recent floods mentioned issues with homes being built on floodplains.
- Survey participants more likely to be concerned:
  - **Residents in metro areas** (43% vs. 36% in regional locations)
  - **Family with kids** (50% vs. 38% households with no kids).

The Impact of Homes on Health & Wellbeing

38%

- Potentially a function of the recent wet weather events, some participants at the focus groups talked about issues with mould and damp and the impacts on respiratory health.
- Some participants living in colder areas (e.g. Hobart and Ballarat) felt that the low temperature exacerbated these issues.
- Survey participants more likely to be concerned:
  - **Younger** (45% under 40 vs. 32% who are older)
  - **People living in units** (44% vs. 36% other)
  - **Tenants** (44% vs. 33% house owners)
  - **Family with kids** (50% vs. 33% households with no kids)
  - **Vulnerable households** (44% vs. 35% non-vulnerable).

The Quality & Condition of Homes for Sale

36%

- This topic was not specifically explored in the focus groups, but several participants made comment about the build quality of new homes (see the first box).
- Survey participants more likely to be concerned:
  - **Younger** (45% under 40 vs. 30% who are older)
  - **Tenants** (41% vs. 32% house owners)
  - **Landlords** (44% vs. 34% non-landlords)
  - **Family with kids** (45% vs. 33% households with no kids).

*"I have hydronic heating because **my husband has asthma**. I didn't want to risk our children having it." **(Melbourne)***

Q1. How concerned, if at all are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010). Full data is in the appendix
Qualitative feedback provided from the phase 1 qualitative research (n=100)

Key Macro Issues – Availability & Quality of Rentals

Nearly half (48%) of Australians are concerned about the number of properties available for rent or the quality and condition of rentals (44%). Not unsurprisingly, tenants and vulnerable households were significantly more concerned about these issues

NET 71% were "Extremely or Very concerned" about availability and quality of housing issues:

The Number of Properties for Rent

48%

- This was touched on in the focus groups but was not specifically explored in detail. Tenants living in regional areas were most likely to raise this issue of low rental availability due to the proliferation of holiday lets and people from the cities buying properties in regional areas.
- Survey participants more likely to be concerned:
  - **Females** (52% females vs. 44% males)
  - **Queenslanders** (56% vs. 46% other states)
  - **Tenants** (63% vs. 37% house owners)
  - **Vulnerable households** (59% vs. 43% non-vulnerable).

"I've been searching for a rental for a friend. One open house that was just a little shabby 2-bedroom thing, ***at least 60 people lined up at the first showing!****" (Hobart)*

"People are moving from the city to the country, putting the house prices through the roof…There are lots of first home buyers, people coming from Melbourne who have a lot of money. ***It's hard for people here to rent." (Ballarat)***

The Quality & Condition of Homes for Rent

44%

- This topic was discussed in the focus groups as a component of the discussion about homes and their impact on the health of occupants, particularly their respiratory health from issues such as toxins and mould.
- The discussion typically focused on the lower quality, lower cost homes available for rent, with stories of homes having no heating or cooling. There was a sense that alongside the high cost of living and the competitive market, tenants are having to settle for properties in poor condition. Several participants felt standards for low-income tenants should be improved.
- Survey participants more likely to be concerned:
  - **Younger** (48% under 40 vs. 40% who are older)
  - **People living in units** (51% vs. 42% other)
  - **Tenants** (59% vs. 33% house owners)
  - **Household includes a person with a disability** (52% vs. 42% of those without)
  - **Vulnerable households** (55% vs. 39% non-vulnerable).

*"****As a minimum a house should have heating and cooling.*** *I've got friends that rent and they have little fan heaters. You just can't heat a house with something like that."* ***(Melbourne)***

Q1. How concerned, if at all are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010). Full data is in the appendix
Qualitative feedback provided from the phase 1 qualitative research (n=100)

Key Macro Issues – Home Building Frustrations

Over half (55%) of participants are concerned about shortages of building materials and access to skilled tradespeople. These issues have been exacerbated by the COVID-19 pandemic's effect on supply chains, a building boom (and bust) and natural disasters such as flooding

NET 55% were "Extremely or Very concerned" about home building frustrations:

Shortages of Building Materials

44%

- Several participants in the focus groups who had recently gone through a home building project spoke of project timelines and costs 'blowing out' due to shortages of building materials.
- Some participants told of builders 'going bust', further hampering project delivery.
- Survey participants more likely to be concerned:
  - **Family with kids** (52% vs. 41% households with no kids).

"Worst experience of my life. I've built three townhouses. ***It was four-year process with all the delays to plans and permits.*** *I would never ever build again."* ***(Melbourne)***

"It's really expensive now and there's a lack of affordable housing. Even the cost of building! I know ***the cost of timber has gone up by 100% in the last 12 months****. People that want to build homes can't afford to build but there's no ready-made homes to go into."* ***(Hobart)***

Shortage of Skilled Tradespeople

43%

- Recent natural disasters and over-stimulation of the building market have made it extremely difficult for many participants planning renovations and new builds to find tradespeople to undertake building and renovation work.
- Survey participants more likely to be concerned:
  - **Household includes a person with a disability** (51% vs. 42% those without).

"I need to replace my front door and back door so our house can be more efficient but ***I can't find a builder to do those little jobs.*** *I'm planning a big extension soon and I if I can't find anybody interested to do that petty job… I don't know how it'll get done"* ***(Ballarat)***

Q1. How concerned, if at all are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010). Full data is in the appendix
Qualitative feedback provided from the phase 1 qualitative research (n=100)

Key Macro Issues – Climate & Carbon

Climate change as an individual issue was ranked highly – 50% of Australians are concerned about it – however, far fewer participants said they were concerned about their household's carbon footprint (28%). Potentially householders are not linking their actions to the bigger climate change picture or not feeling their activities would make a difference

NET 54% were "Extremely or Very concerned" about climate and carbon related issues:

Climate Change

50%

- This is a latent issue around which discussion and emotions can be quickly stimulated.
- When discussing the benefits of having more energy efficient homes that consume less power, several participants in the focus groups talked about their concerns about climate change and the future they would be leaving their children. The idea of everyone 'doing their bit' to mitigate climate change was a compelling one for many.
- Survey participants more likely to be concerned:
  - **Younger** (56% under 40 vs. 46% who are older)
  - **Residents in metro areas** (52% vs. 46% regional locations).

*"**We're effected more in Australia by climate change** - by foods, cyclones and bushfires."**(Brisbane)***

Household's Carbon Footprint

28%

- While many participants at the focus groups could link climate change to carbon emissions, few participants knew how to go about reducing their own household's carbon footprint.
- In addition to this, several participants expressed that they felt that changes individual households could make would make very little difference to climate change overall.
- Survey participants more likely to be concerned:
  - **Younger** (36% under 40 vs. 22% who are older)
  - **Residents in major city** (30% vs. 23% other locations)
  - **Landlords** (37% vs. 26% non-landlords)
  - **Family with kids** (36% vs. 25% households with no kids).

*"I have kids and I want a future full of hope for them **I see a benefit in reducing my carbon footprint** ."**(Penrith)***

Q1. How concerned, if at all are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010). Full data is in the appendix
Qualitative feedback provided from the phase 1 qualitative research (n=100)

Key Macro Issues – Regulatory Burden

Two-in-five participants are concerned about the burden of regulation they face, with a third of participants concerned with the number of regulations placed on builders and renovators and a third concerned about the regulations they have to comply with. Interestingly only 46% of landlords say they are concerned about the regulations they face

NET 42% were "Extremely or Very concerned" about regulatory burden:

The Number of Regulations that those Building a New Home must Comply with

34%

- Several participants at the focus groups who had recently built a new home said they had felt overwhelmed and overburdened by the regulatory red tape they had had to deal with, often due to Councils.
- They mentioned delayed approvals, inconsistent applications of rules and heritage and environmental restrictions which some considered too onerous.
- Survey participants more likely to be concerned:
  - **Landlords** (44% vs. 32% non-landlords)
  - **Family with kids** (41% vs. 32% households with no kids).

"There seems to be considerable delays. I have a friend who is still waiting to build. There's a lot of red tape with the council. ***They still haven't started and it's already 3 years over time when they were thinking they were going to start." (Hobart)***

The Number of Regulations that Landlords must Comply with

30%

- Landlords at the focus groups also spoke about onerous and tough regulations that they had to comply with in order to lease out their property, and the costs associated with this.
- However, other focus groups participants felt that current standards for rental properties, especially those for lower income households were not high currently and that more should be done to improve living conditions for tenants.
- Survey participants more likely to be concerned:
  - **Younger** (35% under 40 vs. 26% who are older)
  - **Residents of an inner suburb of a major city** (38% vs 28% other areas)
  - **Landlords** (46% vs. 26% non-landlords)
  - **Family with kids** (40% vs. 26% households with no kids).

"There are ***ongoing costs of being a landlord,*** *more and more. These checks cost an absolute fortune."* ***(Ballarat)***

*"****It's business at the end of the day.*** *Otherwise you're doing charity work. Someone has to pay."* ***(Melbourne)***

Q1. How concerned, if at all are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010). Full data is in the appendix
Qualitative feedback provided from the phase 1 qualitative research (n=100)

Homes are becoming more expensive and difficult to build, costly to run and the red tape is burdensome. The proposed reforms must be sensitive to these issues and also leverage the concern people feel about climate change and the desire to 'do their bit'.

Reactions to the Proposed Reforms

Focus Group Thoughts on the Need to Raise Standards

Generally, participants felt that the energy efficiency of Australian homes was poor and energy use too high. There is a sense of a need for better standards, particularly for existing properties.

When prompted on the topic of current energy efficiency standards, most felt (or at best, suspected) that the current energy efficient status of most Australian homes is quite poor. Several participants felt that they could be around the 2–3-star mark (out of 10).

Fewer than one-in-five survey participants felt that Australian homes had a good energy efficiency rating (8 or more out of 10, where 10 is excellent).

Discussion often focused on comparisons to other countries like Canada, parts of the United States and Europe. Participants had lived experiences there where houses stayed warm, were built appropriately for the climate and the energy bills were cheaper as a result. Although not stated by name, it was clear these comments were referring to thermal efficiency.

Many participants also commented that something needs to be done to mitigate rising energy prices, address climate change and accommodate the effects of a more unpredictable climate with extreme temperatures and weather events.

When it comes to building standards in relation to energy efficiency, people typically feel that they are likely to be slightly too relaxed or about right, but most didn't really know. Not unsurprisingly, those with experience building or renovating a home had more strongly held opinions on the topic.

Some participants felt that the current building standards overall are quite strict on new builds but not strict enough on renovations. There were also some comments about **current regulations not being enforced strongly enough.**

"We're getting worse in terms of energy consumption and carbon footprint – how many homes have air-conditioning and more than one TV now?" ***(Ballarat)***

"The current standards are not very good but potentially they are getting better with newer builds, but progress is very slow." ***(Brisbane)***

"Just get on with it…we're a long way behind Europe." ***(Coburg)***

"Households need to compromise on convenience and comforts more, not to swap out the water efficient shower heads as soon as the certifier leaves." ***(Brisbane)***

"All new homes need to comply with a 6-star rating, but this can be determined by the appliances, so a builder can use that and achieve a 6-star rating even if everything (the thermal efficiency of the property) is wrong." ***(Melbourne)***

Feedback from phase 1 focus group participants when prompted with the idea (n=100)

Focus Group Thoughts on What Would Drive Action

Government mandates, education, incentivisation and support tools were all mentioned by focus group participants.

Most participants feel that raising standards would need to be driven by Federal and State Government in order to drive widespread action, ensure alignment across states, builders, local authorities and ensure everyone is 'doing their bit' to help Australia reduce its carbon footprint.

However, some participants felt it would not be this simple and that the states would add their own standards on top to take into account their own climatic challenges, which would make things more complicated and expensive.

Others mentioned the current inconsistencies in local council Development Application (DA) approvals and felt these reforms might add further complexity and delays to an already frustrating process.

A few participants did not support government mandates. They didn't want to see government "telling them what to do" and they preferred an educational approach to encourage individuals to see the need for change and to drive action at a grassroots level.

Several participants wanted any new reforms to be accompanied with education for:

- **homeowners** to encourage them to see the value in making the necessary changes – including the provision of case studies and a mobile app to help owners assess their home's current energy efficiency, obtain tips on changes to make and the power bill savings they could make;
- the **building sector**, to create alignment and build competence; and
- **local authorities** to create alignment in relation to what they would approve.

Many would expect to be incentivised to make energy efficiency upgrades: There is a common perception that energy efficiency upgrades (e.g., double glazing and solar) is expensive. Several are looking for the government to play its part to help them make it cost effective, and not burdensome on vulnerable parts of the community.

"Government should be responsible – with basic standards set at a federal level and then localised rules set at state or regional level to factor in climatic differences." ***(Toowoomba)***

"Ultimately it should not be a government issue. It should be people's own decisions. If they want a lower energy bill, they can pay for these things. Ultimately it will hurt the consumers, but I voluntarily did these things myself – it was for my comfort." ***(Melbourne)***

"There's going to need to be a pretty good educational system put in place to explain to people why, if they have a white roof, it's going to be a lot cooler." ***(Adelaide)***

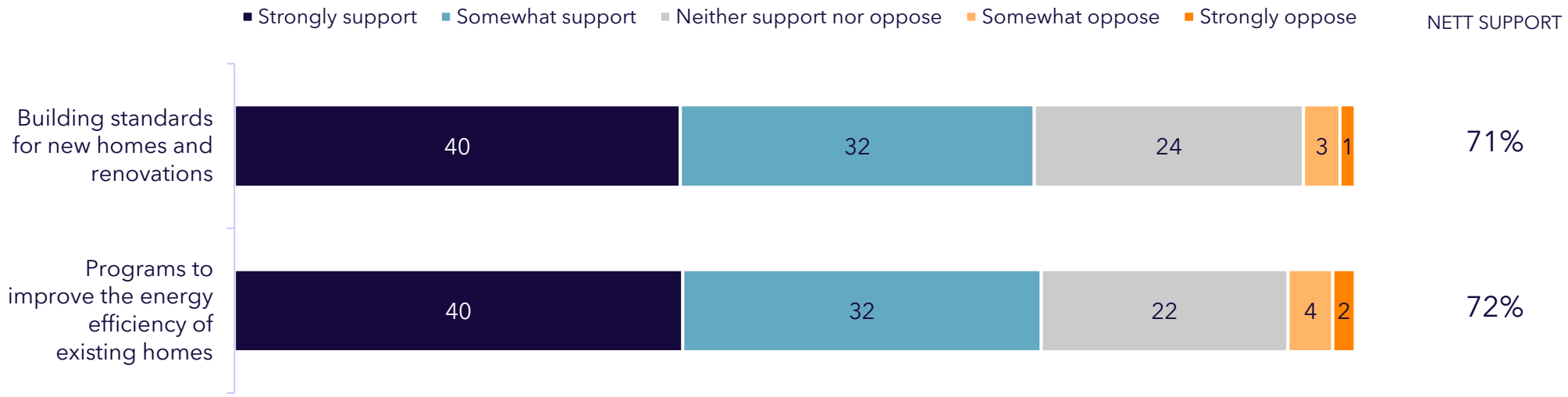
"Usually, when the government introduces any new energy initiatives or any new initiatives, they give a lot of rebates. So for example, when they use the LED lighting, they did switch over from they took away the older bulbs, they made the switch over to the new LED lights free of cost. There is also an initiative where if you have appliances, which are of low energy." ***(Penrith)***

Feedback from phase 1 & 2 focus group participants when prompted with the idea (n=150)

Overall Reactions to Improving EE Standards

When the idea of State and Federal governments improving energy efficiency of Australian homes was introduced in the survey most participants were in support, but this comprised a mix of strong and soft support

Support for the proposed reforms (%)



More likely to support (strongly / somewhat)	More likely to oppose (strongly / somewhat)
Improving building standards for new homes and major renovations • **Older** (81% of those 65+ vs. 69% among those who are younger) • **Those who are not landlords** (74% vs. 60% landlords) • **Those considering a new build / renovation** (76% vs. 69%)	**Improving building standards for new homes and major renovations** • **Younger** (7% among those under 40 vs. 3% among those who are older) • **Those who have recently built / renovated** (9% vs. 3%)
Programs to improve the energy efficiency of existing homes • **Older** (82% of those 65+ vs. 70% among those who are younger) • **Those who are not landlords** (75% vs. 62% of landlords) • **Those considering a new build / renovation** (77% vs. 70%)	**Programs to improve the energy efficiency of existing homes** • **Younger** (8% among those under 40 vs. 4% among those who are older) • **Landlords** (10% vs. 4% among non-landlords) • **Those who have recently built / renovated** (11% vs. 4%)

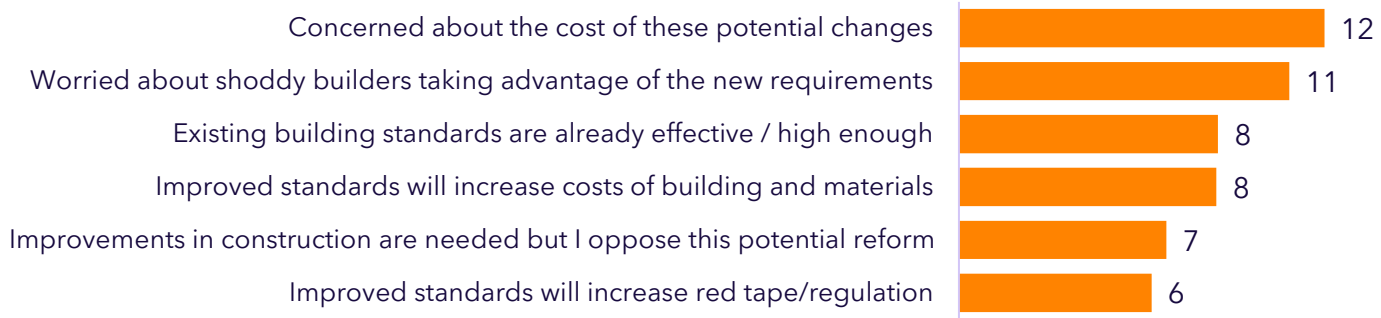
Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this? Profiling in the appendix
Base: All participants (n=2,010)

Reasons for Support/Opposition: New Home Reforms

Four in ten (43%) said it would result in better quality of work and protect homeowners against poor workmanship. Two in ten (20%) cited environmental reasons such as reducing the carbon footprint and climate change. Those opposed to it were concerned about the increased costs, regulatory burden or builders exploiting the system

Reasons for support of the New Build reforms (all mentions >5%)

Reasons for opposition to the New Build reforms (all mentions >5%)

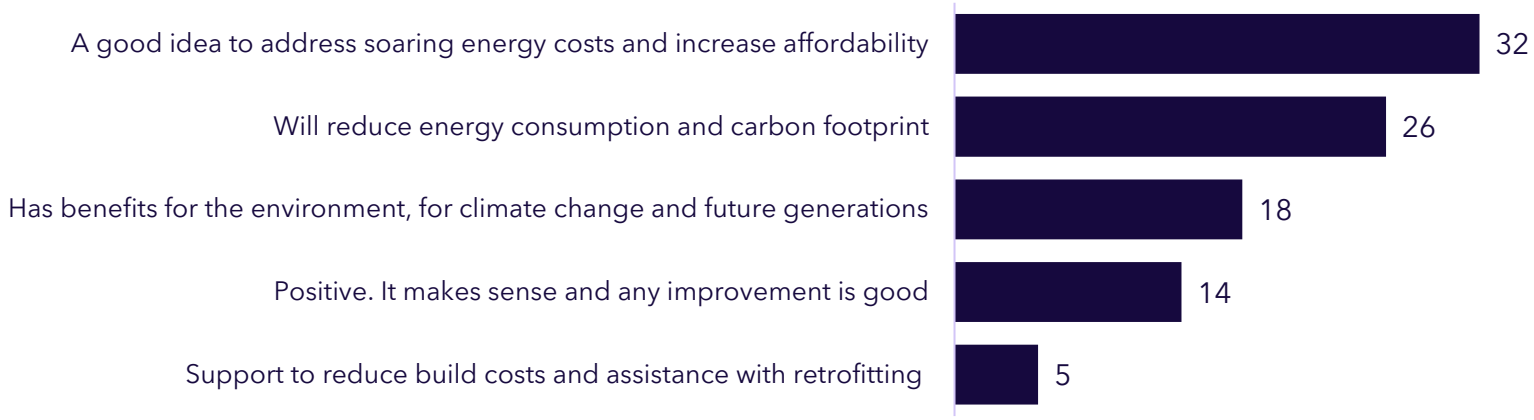


Q4. For what reasons did you say you [SUPPORT/ OPPOSE] this proposed reform?
Base: All in support (n=690), all in opposition (n=81).

Reasons for Support/Opposition: Existing Home Reforms

Participants were able to articulate their reasons for supporting or opposing reforms for existing homes more than for new homes (higher percentages). Addressing soaring energy costs was the number one reason for support (32%), followed by reduced carbon use and to address climate change (38% mentioned these reasons in total). Cost was the number one reason for opposing the reform (29%)

Reasons for support of the Existing Home reforms (all mentions >5%)



Reasons for opposition to the Existing Home reforms (all mentions >5%)

Q4. For what reasons did you say you [SUPPORT/ OPPOSE] this proposed reform?
Base: All in support (n=738), all in opposition (n=41).

Focus Group Reactions to the Overall Idea of EE Reforms

Across the groups a good level of positivity to the overall idea of improving energy efficiency standards for Australian homes.

However, prior to seeing any detailed information on the specific proposals, many participants raised questions about what the reforms might entail, specifically:

- **What the reforms would require** them to do differently and how onerous they might be, particularly in relation to retrofitting into an existing home.
- **How the new requirements would be funded** and **how affordable** they would be.
- **How they would be policed for compliance.** There was a sense from some that many builders only paid lip service to current building standards and that this may not change with the introduction of new measures.
- **How the reforms would be introduced to avoid unintended consequences** such as increasing waste and expense as people comply.

Those who had already built a house or had undertaken a major renovation were more resistant to the idea of the reforms because of the significant investment they had already.

"They shouldn't be over the top to implement and should be practical – not take months to design." ***(Coburg)***

"Who is going to pay? This could be a $30K project! The upgrades need to be affordable for all regardless of income." ***(Parramatta)***

"My concern is if someone is renovating their house, if they want to use their old appliances, will have to spend more and throw away their old appliances, what is the environmental impact of throwing away old appliances that can be used." ***(Coburg)***

Without information, while seen as a good idea with major benefits, many concerns are raised

CONCERNS IDENTIFIED

- **The additional cost** it might entail.
- **Perceived high cost and difficulties for upgrading existing homes** particularly those with heritage character.
- **Perceived trade-offs in desired aesthetic for new builds**.
- **No evidence** for payback through bill savings on any investment made.
- **Increased regulatory burden** particularly in relation to overly rigid regulations.
- **The risk of incorrectly applied standards** for example, cold regions such as Hobart have hot days to consider too.

PERCEIVED BENEFITS

- **Lower power bills**
- **Lower carbon foot print**
- Better living environment - healthier
- A potential reduction in the cost of energy efficient building materials due to increased demand

Feedback from phase 1 & 2 focus group participants when prompted with the idea (n=150)

Information Shown to Participants about the Reforms

The six proposals underpinning the reforms were presented to participants

1. Increasing thermal efficiency building standards for new homes from 6 to 7 stars

Builders would only receive permits if their plans meet a 7-star standard.

This standard is similar to the energy efficiency standards applied to household appliances like TVs and refrigerators, where the higher the rating, the more energy efficient it is. The thermal efficiency standards for buildings go from 0 to 10 stars, where 0 means the building is not energy efficient at all and 10 is the maximum it can be.

It would make new homes 25% more efficient to heat and cool than the current 6-star minimum standard.

Raising the standard to 7-stars typically increases building cost for an apartment by around $500 and for a house by around $1,000-2,000, but it significantly reduces energy bills.

Measures to reach 7-stars are flexible and relevant to the specific climate of a building. They can include property orientation – i.e. having north facing windows in a cool climate, shading, cross-ventilation, window and door seals and insulation.

The amount of energy bill savings varies by location, but – based on current electricity prices and interest rates - can be several hundred dollars a year and higher than the home loan payments needed to meet higher building standards.

Buildings are long-lived, so the impact of energy inefficient buildings lasts a long time. Most buildings are built to minimum standards, which have not changed since 2010.

2. Increasing thermal efficiency standards for major renovations from 6- to 7-stars

Just like with new homes, energy efficiency rules would apply to major renovations (e.g. if the renovation cost was over $50,000 or if over 50% of the home is affected).

There are exceptions such as when the renovations are limited in scope or don't affect energy use.

The change to a 7-star standard (on an energy efficiency scale from 0-10) would reduce the energy use of renovated homes, but may sometimes add costs to renovations.

3. Creating new energy efficiency standards for rental homes

This means that a State or Territory government would specify an energy efficiency standard that a rental property has to meet before it can be rented out.

For example, a rental property might have to have ceiling insulation, an efficient heater, and/or meet a certain star rating.

This proposal intends to make it easier for tenants to understand the energy costs of a home, and incentivise landlords to improve energy performance of their rentals. It also intends to ensure that no rental homes are unsafe or uninhabitable.

Information Shown to Participants About the Reforms (2)

The six proposals underpinning the reforms were presented to participants

4. Mandatory disclosure of a home's energy rating when it is sold or leased

This would mean that a home's star rating must be disclosed when it is sold or leased.

For existing homes without a known star rating, an in-person assessment using a rating system like the Residential Energy Efficiency Scorecard could be required (costing homeowners around $300-400).

The intention of disclosure is to make it clear how much energy your home will use, to make it easier to understand likely energy bills, and to incentivise sellers and landlords to improve energy efficiency.

5. The rollout of government retrofit programs for low-income households, including social housing, rental housing and low-income homeowners

This means more Australians could experience the benefits of an energy efficient home.

Governments would fund or subsidise retrofits for eligible households, including measures such as draught sealing, insulation, and replacing inefficient appliances.

Retrofits would be free or residents could make a co-contribution in line with their income.

This proposal is based on a belief that all Australians should be able to access affordable energy, benefitting future occupants, as well as the people living in that home now.

6. Incentives to make existing homes more energy efficient

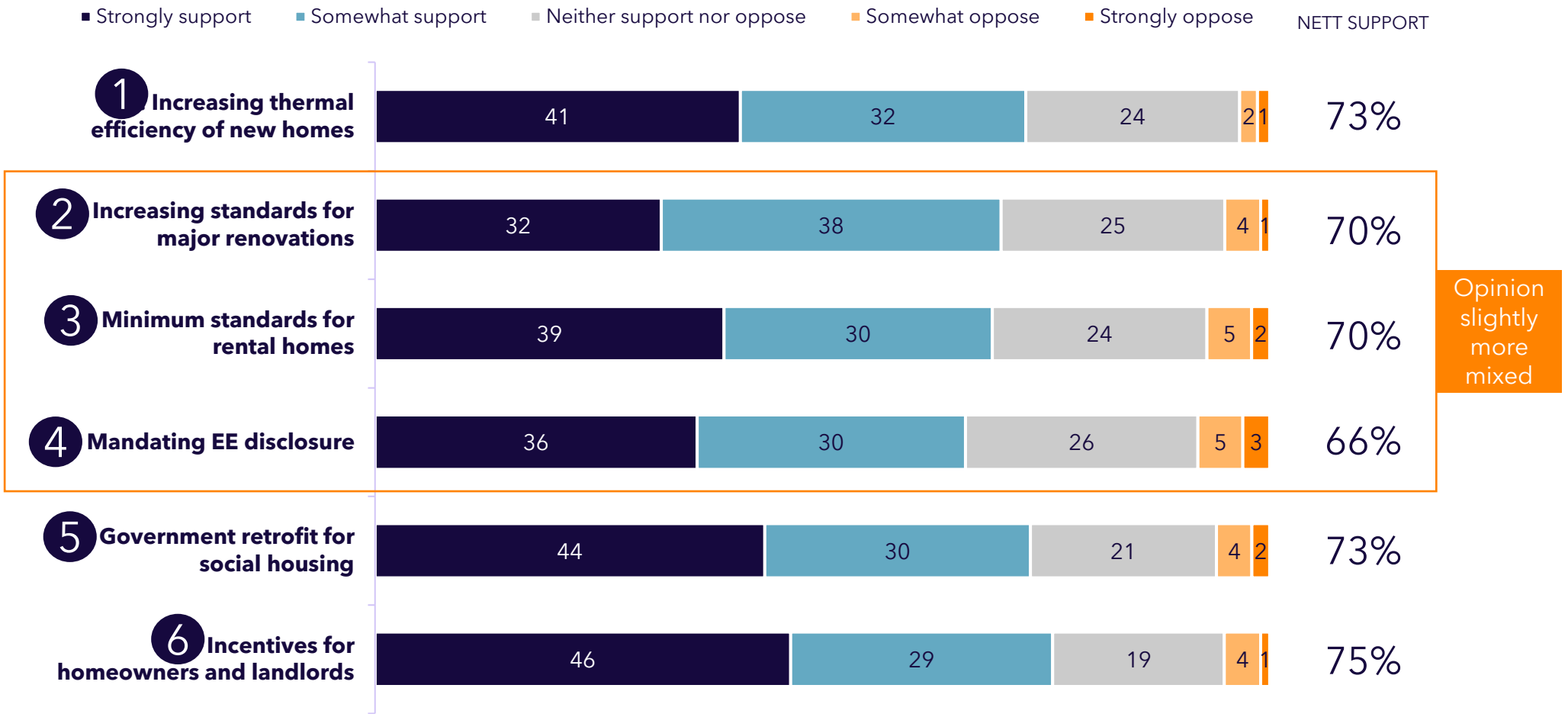
To accelerate upgrades to existing homes, consumer and community groups are encouraging governments to rollout programs to help lessen the financial burden to homeowners and landlords.

Incentives might include rebates to reduce the cost of appliances, tax breaks, low or no interest loans, or a 'green' grant. Information, advice and tools will also be provided to make upgrades easier.

Support for Each Proposal

Most participants were in support of each proposal, with slightly higher levels of support given to incentives for homeowners and landlords (75%), Government retrofit for social housing (73%) and increasing thermal efficiency for new homes (73%)

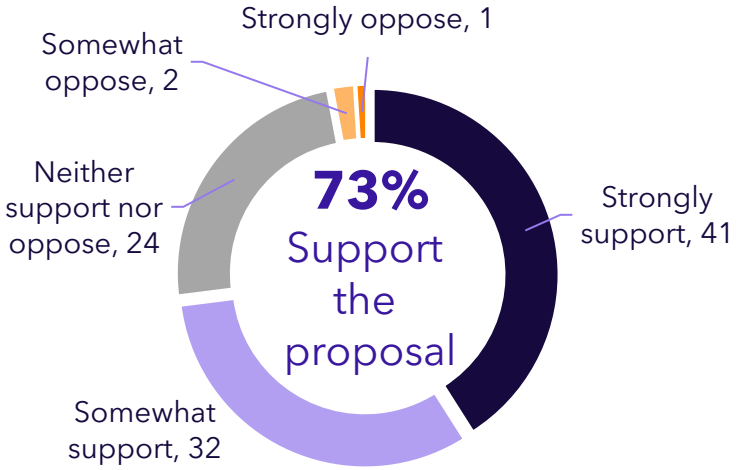
Participant rating of support for each specific proposal (%)



Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix

1 Increasing Thermal Efficiency for New Homes

This proposal was positively regarded, with many participants feeling that it would be easier to apply upgrades to new builds than it would be for existing homes, however, they wanted further information on likely costs and benefits



More likely to support	More likely to oppose
• **Older** (84% of those aged 65+ vs. 71% of those who are younger) • **House owners** (78% vs.66% tenants) • **Non-vulnerable households** (76% vs. 68% vulnerable) • **Higher income households** (81% of those earning more than $130K p.a. vs. 73% among those earning less) • **University+ education level** (79% vs. 69%) • **Those who are considering building or renovating** (81% vs. 70%) • **Builders** (78%) or **renovators** (79%)	• **Those in SA/NT** (65%) vs. 74% of those in other states • **Those who have recently built / renovated** (6% vs. 2%)

Most considered this a positive move, considering this would be relatively easy to implement for new builds - compared to upgrades to existing properties – and many felt this is where the new regulations should start from.

However, the figures presented generated much comment and polarised opinion:

- Several felt the additional cost to make the required changes were reasonable ($2k for a house) **however, others felt that this sounded too low.**
- A minority of participants, particularly those in regional areas considered **the potential cost to make the changes to be unaffordable** and wanted more information on how quickly they would recoup the outlay via bill savings.

Several participants wanted **more information on what these standards would entail** and - particularly those who had just commissioned a new build – how much additional red tape they would generate.

Other participants raised concerns about how the mandates would work with council planning controls, bearing in mind the current inconsistencies with DA approval decision-making.

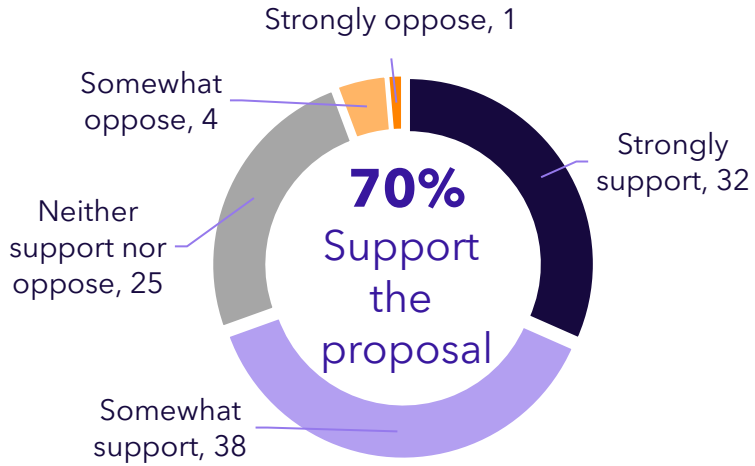
"It won't be $2K, it's going to cost tens of thousands of dollars." ***Ballarat***

"Your assumption that would be like 50 grand or something, but it does read to me that they might only have to tick a couple boxes to get that seven star, as mentioned in the examples, like, you know, doing a bit of sealed door seals and insulation…. I thought it would be a far more dramatic." ***(Adelaide)***

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix
Qualitative feedback from phase 1 & 2 focus group participants (n=150)

2 Increasing Standards for Major Renovations

While most felt that standards for renovations should be raised, some had concerns about how it would be implemented fairly given the variety of possible properties and projects and how the EE rating of the whole home would be calculated



More likely to support	More likely to oppose
• **Older** (76% of those aged 65+ vs. 68% of those who are younger) • **House owners** (74% vs. 64% tenants) • **Those living in metro areas** (71% vs. 65% regional) • **Non-vulnerable households** (71% vs. 65% vulnerable) • **Higher income households** (77% of those earning more than $130K p.a. vs. 69% among those earning less) • **University+ education level** (74% vs. 66%) • **Those who are considering building or renovating** (78% vs. 66%)	• **Those in SA/NT** (60%) vs. 70% of those in other states

Most were positive about this proposal at a headline level with several feeling that standards for renovations are too lax currently.

However, several participants raised concerns after further detail was provided, causing them to provide a lower rating:

- **Some felt the $50K threshold for the measures to be too low.**
- Others felt that the current **criteria and caveats provided were too vague and confusing** and would be taken advantage of.

Several participants expressed **confusion about how the overall thermal efficiency of an existing property would be calculated** if only part of it had been renovated.

This proposal generated a lot of discussion for the sheer breadth of the type of work and properties it would cover and the **difficulty (and cost) it could potentially incur for people trying to renovate older properties**.

Some participants would prefer to see guidelines rather than mandates here that would take into account the age and condition of the home (i.e. different levels of upgrade).

"Ballarat has 150-year-old houses – as draughty as hell – we've got a large proportion of houses that will cost a bomb to get them up to a level that is going to be sustainable." ***Ballarat***

"$50K is not that much for a reno - it's a bathroom." ***(Parramatta)***

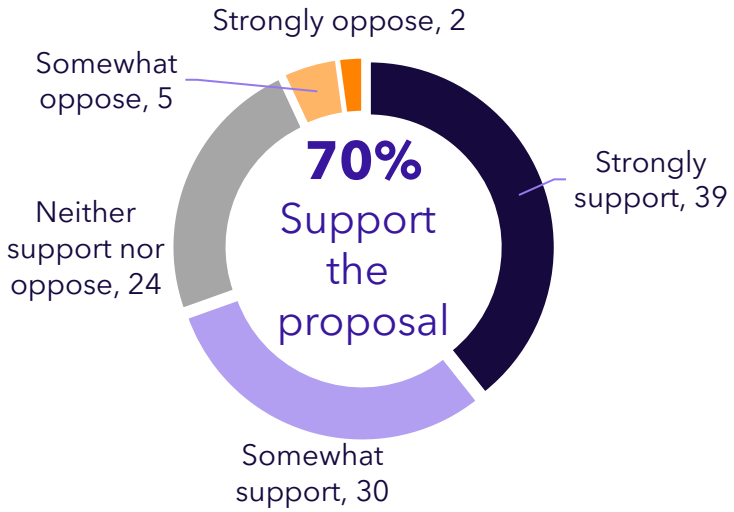
"You're very limited in what you can do with a renovation." ***(Coburg)***

"It's still a good idea in principle, especially if we're taking something that's average and making it better, but what happens to the existing home? What's the new overall rating if you're checking out the stars on the new bit but not the old bit? And who's arbitrating? What your new overall energy efficiency rating?" ***(Adelaide)***

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix
Qualitative feedback from phase 1 & 2 focus group participants (n=150)

3 Minimum Standards for Rental Homes

This proposal was somewhat polarising, with landlords concerned about additional costs and red tape and widespread concern about impact on rents and rental availability for tenants



This proposal created the most polarisation of all.

Several participants had concerns that costs of upgrades would be passed on to tenants, potentially making the rental crisis worse.

Others expressed concerns about landlords being **forced into upgrading a property that they may end up demolishing** in a relatively short timeframe, 'wasting' money.

Landlords were most negative about this proposal perceiving it to entail more regulation, paperwork and box ticking for potentially little financial gain. Some also felt it would lead to landlords selling their properties, reducing the number of properties available and potentially pushing up rents.

Some participants were positive towards it feeling that landlords had an obligation to their tenants and could write off the changes against their tax bill. Discussion in Parramatta focused on the need to **improve public health outcomes for tenants** – with participants talking about the need to upgrade cold, mouldy properties.

Most agreed there should be a mechanism in place to stop landlords passing on the costs to tenants and participants were in broad agreement that a **carrot rather than stick approach** (i.e. tax breaks) would work best.

Some participants said that **the rollout of this reform should be slow** to allow landlords time to make the required upgrades. **And a few participants felt that the proposal should be a guideline rather than mandated** and that tenants would vote with their feet if a property didn't measure up in terms of what they were prepared – or could afford - to pay.

"What if in 20- 30 years it's going to be bulldozed anyway? … the amount of energy and materials that go into creating this benefit isn't going to actually deliver an environmental benefit if the home gets demolished anyway?" ***(Adelaide)***

"If you have a rental property and you're making improvements to it, you can claim it as a deduction, especially if you have a higher salary." ***(Adelaide)***

"We need to be fair to tenants." ***(Melbourne)***

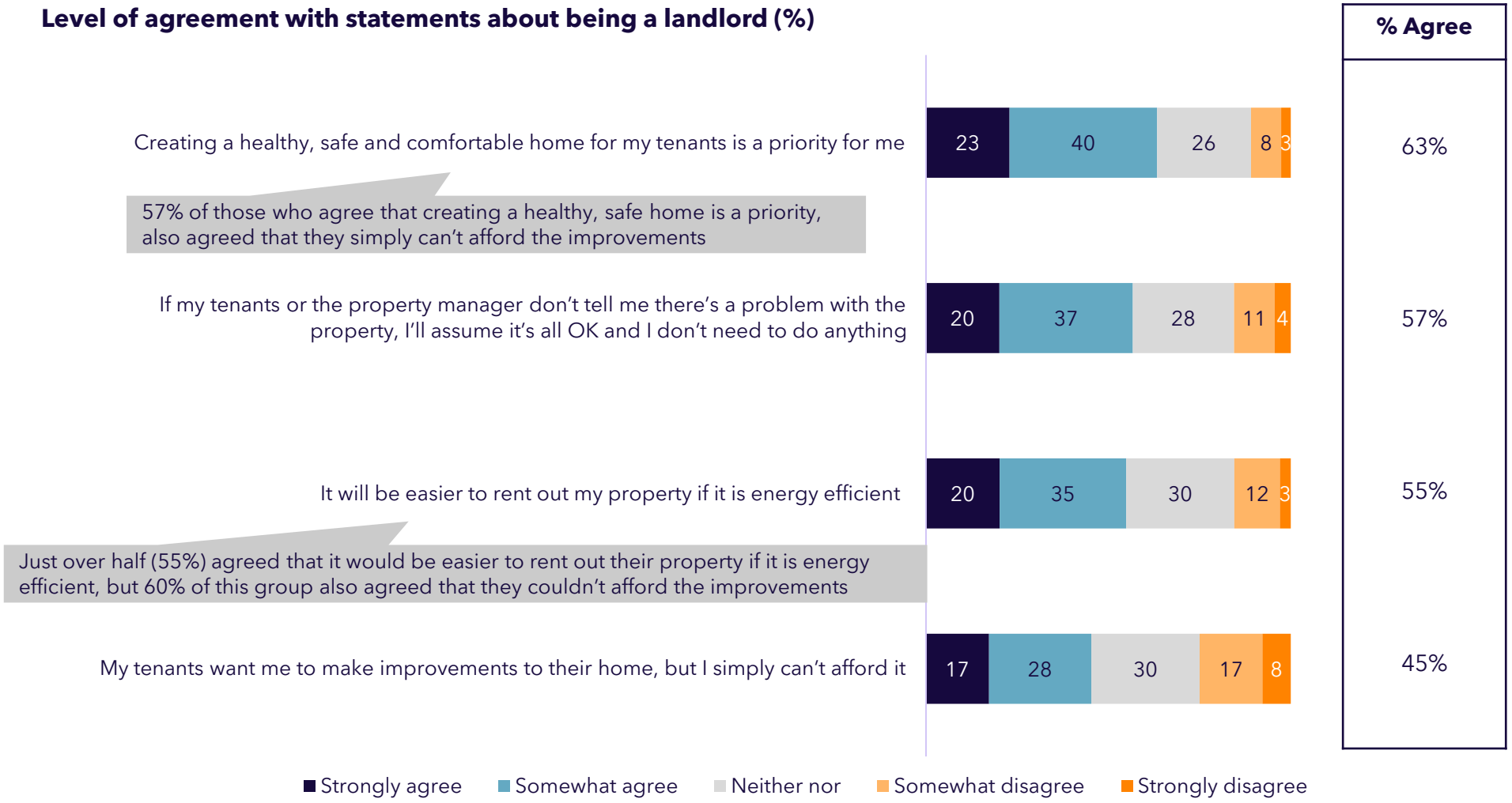
"I support it but should be a phased thing. Having a knee-jerk reaction would be quite painful and not every landlord is a rich investor" ***(Coburg)***

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix
Qualitative feedback from phase 1 & 2 focus group participants (n=150)

Landlord Mindset

The majority of landlords (63%) agreed that creating a healthy, safe and comfortable home for their tenants is a priority and half agree that an energy efficient property would be easier to rent out, but affordability and inertia are key barriers to making the desired changes

Level of agreement with statements about being a landlord (%)

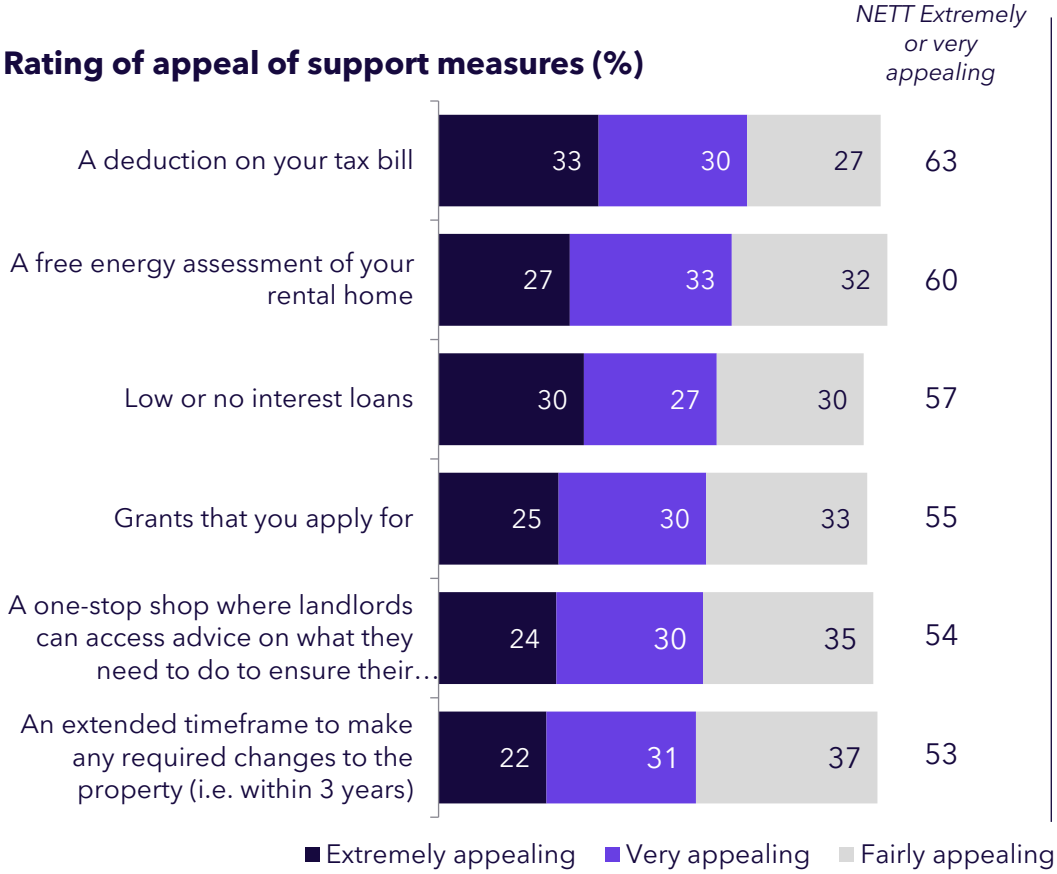


Q15. How much do you agree or disagree with the following statements about being a landlord? Base: All landlords (n=436)

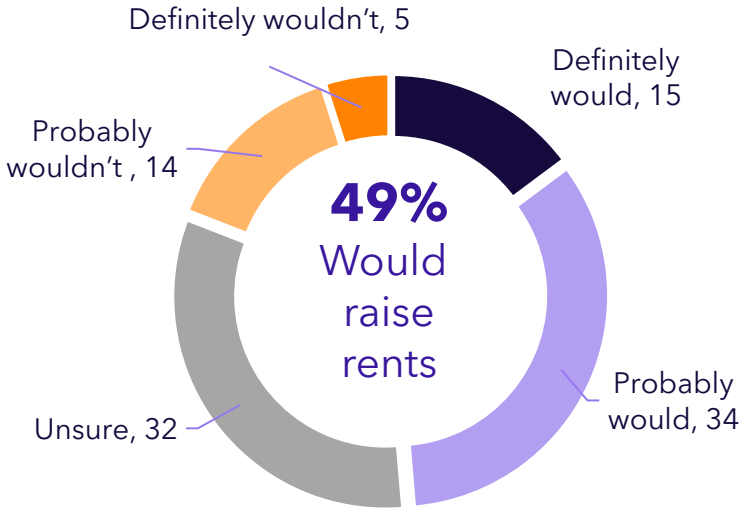
Landlord Views on Potential Support Measures

The most appealing support measures were a deduction on their tax bill (63%) and a free energy assessment of the rental home (60%). Regardless of support measures offered, around half of landlords (49%) said they would raise rents and a further one in three (32%) were unsure whether they would or not

Rating of appeal of support measures (%)



Would raise rents even with support (%)



Other support suggestions:

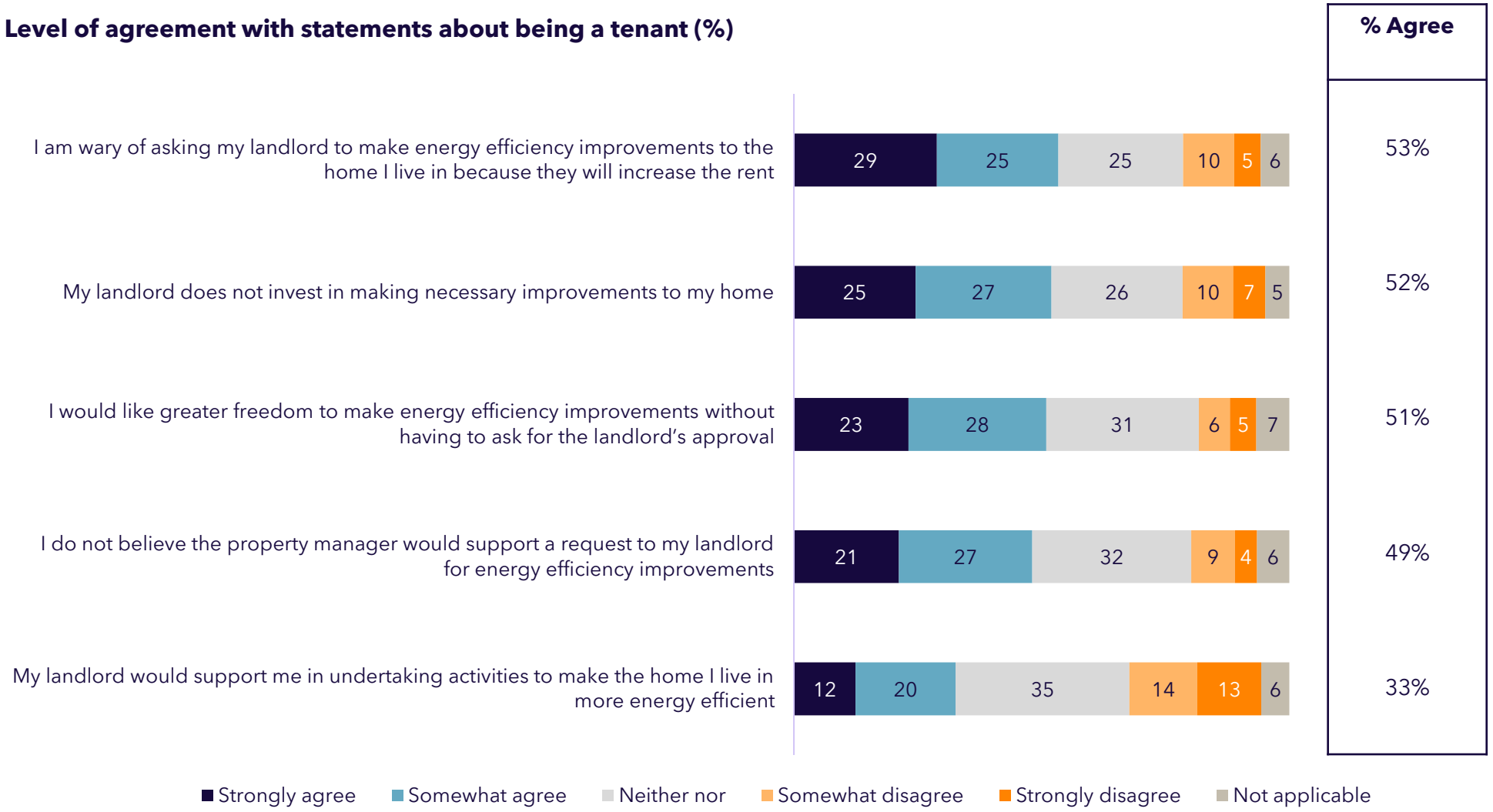
- A money grant to support a battery storage for solar energy
- Financial support to complete upgrades
- Free solar assessor like LED and installation discounts on the spot
- Give assistance to tenants should they wish to save energy
- Good quality product and service
- Improve solar heating and solar power equipment installation
- Provide readily accessible information on all this
- Rebate on energy efficient appliances or renovations

Q10. Please rate each to indicate the appeal of each measure if it was in place?
Q10a. Other support measures requested. Q10b. Assuming you have the government support measures you need in place how likely do you think you would be to pass on the cost of any required upgrades to your tenants in the form of rental increases?
Base: All landlords (n=436)

Tenant Mindsets

A perceived reluctance from landlords was a key barrier to tenants obtaining energy efficient homes (52%) and half of tenants were wary of asking for improvements due to a fear landlords would increase the rent (53%). Just 33% agreed that their landlord would support them in making their home more energy efficient

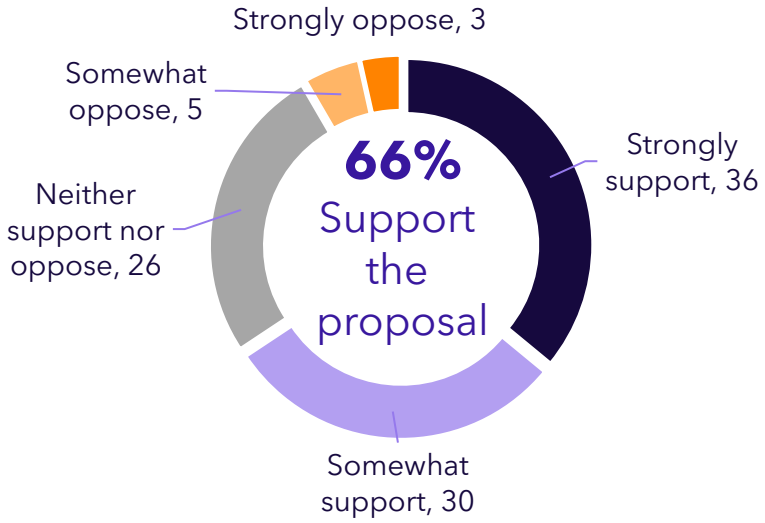
Level of agreement with statements about being a tenant (%)



Q16. How much do you agree or disagree with the following statements about being a tenant? Base: All tenants (n=743)

4 Mandating EE Disclosure When Home Sold or Leased

While some participants felt it would help embed energy efficiency as a consideration and give purchasers and tenants more information others were concerned that people unable to make the Energy Efficiency (EE) upgrades might be penalised in terms of lower resale value or rent



More likely to support	More likely to oppose
• **Higher income households** (76% of those earning more than $130K p.a. vs. 64% among those earning less) • **Those who are considering building or renovating** (73% vs. 63%)	• **Those in rural/remote areas** (12% vs. 6%)

Several participants praised this proposal as a vehicle for bringing the value of energy efficiency to the fore with improvements converting to a higher sale value or rental return.

They would value this information to aid informed decision-making about any property they might want to rent or buy and also considered it to be a **good way to educate the public about the types of improvements they could make**.

However, some participants raised concerns about these measures

- **Landlords were concerned about potential loss of rental income** if other properties in the area had a higher rating, as well as potentially having to pay for certification each time the property is rented out.
- A few (older) participants who had recently build or renovated a property were also negative about this proposal – **fearing that owners would not achieve the sale price they wanted to if they were unable to afford to make the necessary upgrades.**

Other participants would like to know how the system would be policed to stop people over-rating their properties.

Opinions around the scorecard cost were polarising: While deemed reasonable by several homeowners, landlords had concerns about the fee, particularly if it were to be payable every time they changed tenants. They required more information about how long the certificate would be valid for.

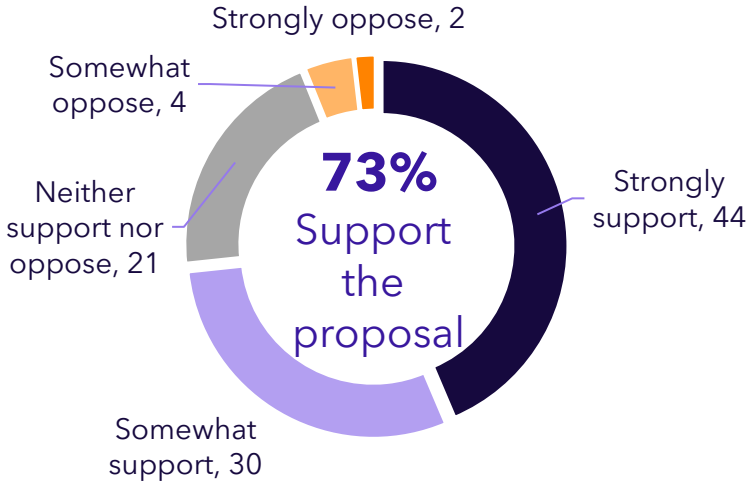
"I need more information about the scorecard cost and how long it is valid for – if its only valid for 90-days, then that would not be good if I have to get a new one every time the property is rented out." ***(Toowoomba)***

"I've heard about this in the ACT – it's a good thing, really raises the importance of energy efficiency and what you are potentially taking on with a new home." ***(Penrith)***

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix
Qualitative feedback from phase 1 & 2 focus group participants (n=150)

5 Government Retrofit Programs for Social Housing

Almost all participants in the focus groups understood the need for 'no home to be left behind' and felt that largescale rollouts would help bring down prices of materials. Older females were most supportive of this proposal



More likely to support	More likely to oppose
• **Females** (77% vs. 70% males) • **Older** (83% of those aged 65+ vs. 71% of those who are younger) **Those who are not landlords** (75% vs. 67% of landlords)	• **Males** (9% vs. 4% females)

At a base level most understood the need for social housing and low-income housing programs.

- **The ethos of 'no home left behind' resonated** with several participants, particularly if considered in the larger context of Australia meeting its Net Zero goals.
- However, some participants wanted to see how this would be rolled out and **how households would be means tested** to avoid abuse of the system.

Several participants thought that **largescale social housing rollouts could help build case studies** to educate the wider population.

Others felt that large-scale programs would potentially serve to **bring down the costs of materials** and **boost the pool of skilled tradespeople** able to undertake the work.

A few participants also mentioned that these measures would ultimately save tax payers money in that the tenants would be spending less on energy bills.

Some (older) participants wanted to see evidence that the approach **does not overservice those in social housing at the expense of supporting homeowners**.

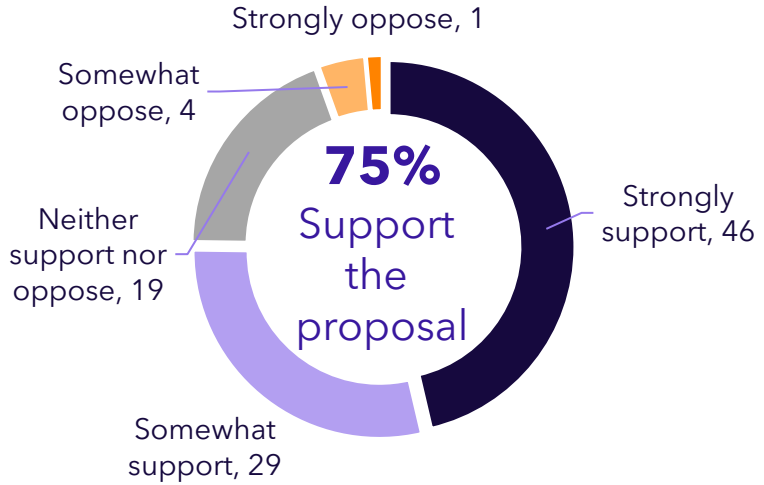
"It will help people in social housing save money, as long as it is done correctly not like insulation where it has to be a really regulated government body to make sure jobs are being rolled out correctly." ***(Coburg)***

"This should be the priority of that entire list. If we're building 6-star energy rated new houses, given the current issues with the building industry, maybe we should be happy with that for a bit longer and focus on helping people who are living in low energy efficient houses who are struggling in those circumstances because everything is more expensive." ***(Hobart)***

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix
Qualitative feedback from phase 1 & 2 focus group participants (n=150)

6 EE Incentives for Homeowners and Landlords

People were in strong support of homeowners being incentivised to undertake this work – helping ensure everyone was 'doing their bit' to address climate change. However, they sought reassurances it would be closed to potential abuse



More likely to support	More likely to oppose
• **Older** (85% of those aged 65+ vs. 73% of those who are younger) • **People living in a detached house** (78% vs. 70% other house types) • **Homeowners** (77% vs. 72% of renters) • **Higher income households (**81% of those earning more than $130K p.a. vs. 75% among those earning less) • **Those who are considering building or renovating** (80% vs. 73%)	• **People living in semi detached / terrace** (10% vs. other house types) • **Those who have recently built / renovated** (9% vs. 4%)

This proposal was well-received by the majority of participants across all groups, with the belief that incentives are necessary to drive change.

Several commented on **the need to balance pay-back to homeowners with preventing abuse of the system.** Several participants mentioned that the 'Pink Batt' scheme had been widely abused by scammers and rorters – putting lives at risk - and that they would not like to see that happen again.

Suggestions for incentives included:

- Tax deductions; and
- Grants / 0% interest loans that people apply for.

Some participants - mainly those who have been burned by poor returns on solar investment - would like to see this in the form of 'cash in hand now'.

In addition to incentives several participants would also like to receive support and guidance on how to go about making the upgrades. Several participants in the Parramatta groups mentioned the provision of **online calculators to help homeowners decide what modifications they should focus on** for their home and location and how much they would save on bills by doing so.

"If they don't put the incentive in people just won't do it. With the cost of living so high, people will just pay a little bit extra on the power bill over time rather than incur a huge upfront cost", which they can't afford." ***(Coburg)***

"I'd like to have somewhere you can call if you have a question." ***(Parramatta)***

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010). Profiling in appendix
Qualitative feedback from phase 1 & 2 focus group participants (n=150)

Overall Opinions on the Reform Rollout

Participants in some of the focus groups were asked about their preferences for the the rollout of the reforms. Most would like to see the reforms rolled out in stages, with new homes the first to be implemented, and landlords and homeowners given a longer time to make the changes

1st Roll out reforms for new builds

2nd Roll out for social housing programs

3rd Roll out guidelines for renovations

4th Roll out guidelines for existing properties & rentals

"Start with new homes immediately. It would be much easier to make changes to a new home than it would an existing property." ***(Parramatta)***

"Social housing programs will help bring the prices of sustainable building materials down and would provide great case studies and examples to show to homeowners." ***(Parramatta)***

"Staged. Try it on a small scale and see how it works. Roll out one program, see how it works, get feedback, do an audit." ***(Coburg)***

"Trying a carrot first then the stick. Encourage people to do it then have a cut-off by when it has to happen." ***(Coburg)***

Feedback from phase 2 focus group participants (n=50)

Most people support the proposed reforms. However, specific information on how they would be implemented is needed to offset concerns.

Appendix 1:
Full Sample Profile

Sample Profile: Total sample n=2,010

Attribute	n=	Wt'd %
Male	953	48%
Female	1,041	51%
Other gender	16	1%
Aged 18-24	234	12%
Aged 25-34	402	19%
Aged 35-49	546	26%
Aged 50-64	445	24%
Aged 65+	383	20%
NSW resident	549	32%
Vic resident	460	25%
Qld resident	380	20%
WA resident	240	10%
SA resident	281	8%
Resident in other location	100	5%
Identifies as Aboriginal or Torres Strait Islander	131	6%
Speaks a language other than English	334	17%
Lives in a freestanding house on a large plot	774	38%
Lives in a freestanding house on a small plot	578	29%
Lives in a semi-detached house, terrace or townhouse	299	14%
Lives in an apartment or unit	334	18%
Lives somewhere else	25	1%
Lived in current property for less than 6 years	1,002	48%
Lived in current property for 6 years or more	1,008	52%

Attribute	n=	Wt'd %
Lives in Major City (Inner/Middle Suburbs)	873	47%
Live on Outskirts of Major City	565	29%
Lives in Regional Centre	276	11%
Lives in Small town or village/Remote area	296	13%
Owns home outright	617	32%
Paying off mortgage	580	27%
Renting	743	38%
Residential Landlord	436	20%
Single person household	416	23%
Couple only household	526	26%
Family household	872	42%
Other household type	196	10%
University educated	849	43%
Left education prior to university	1,161	57%
Full time employed/Self-employed	835	40%
Part-time employed/Casual	387	18%
Retired	422	23%
Unemployed / full time student / full time home or carer duties	366	19%
Financially doing well or doing OK	1,437	71%
Financially having difficulty making ends meet	573	29%
Self/family member works in energy	140	7%
Self/family member works in construction	261	12%
Has a Centrelink card, pension or other benefit/allowance from government	858	43%

How People are Currently Living – Home Type & Age

In line with ABS statistics, most participants were living in freestanding houses.

% of participants living in each house type

D2. Which of these best describes the home you live in?
D3. Approximately how old is the home you live in?
Base: All participants (n=2,010).

How People are Currently Living – Property profile

	Total sample	Builders	Renovators	Planning to build or renovate	Landlords	Tenants	Financially vulnerable
Sample size (n=)	2,010	649	694	673	436	743	573
I intend to sell the property I currently live in within the next three years	10	18	19	17	19	0	7
I intend to demolish the property I currently live in within the next three years	2	7	7	6	8	0	0
The property I currently live in is managed by a body corporate or is under a strata arrangement	17	21	19	20	22	22	16
The property I currently live in is heritage listed	4	9	9	7	13	5	3
I am actively looking to buy a property within the next three years	10	19	13	18	10	26	11
None of the above	60	33	42	40	37	52	65

D4 Do any of the following apply to you?
Base: All participants (n=2,010).

Significantly higher than the other sub-group (i.e. those who are not builders, not tenants etc) @ 95%

Significantly lower than the other sub-group @ 95%

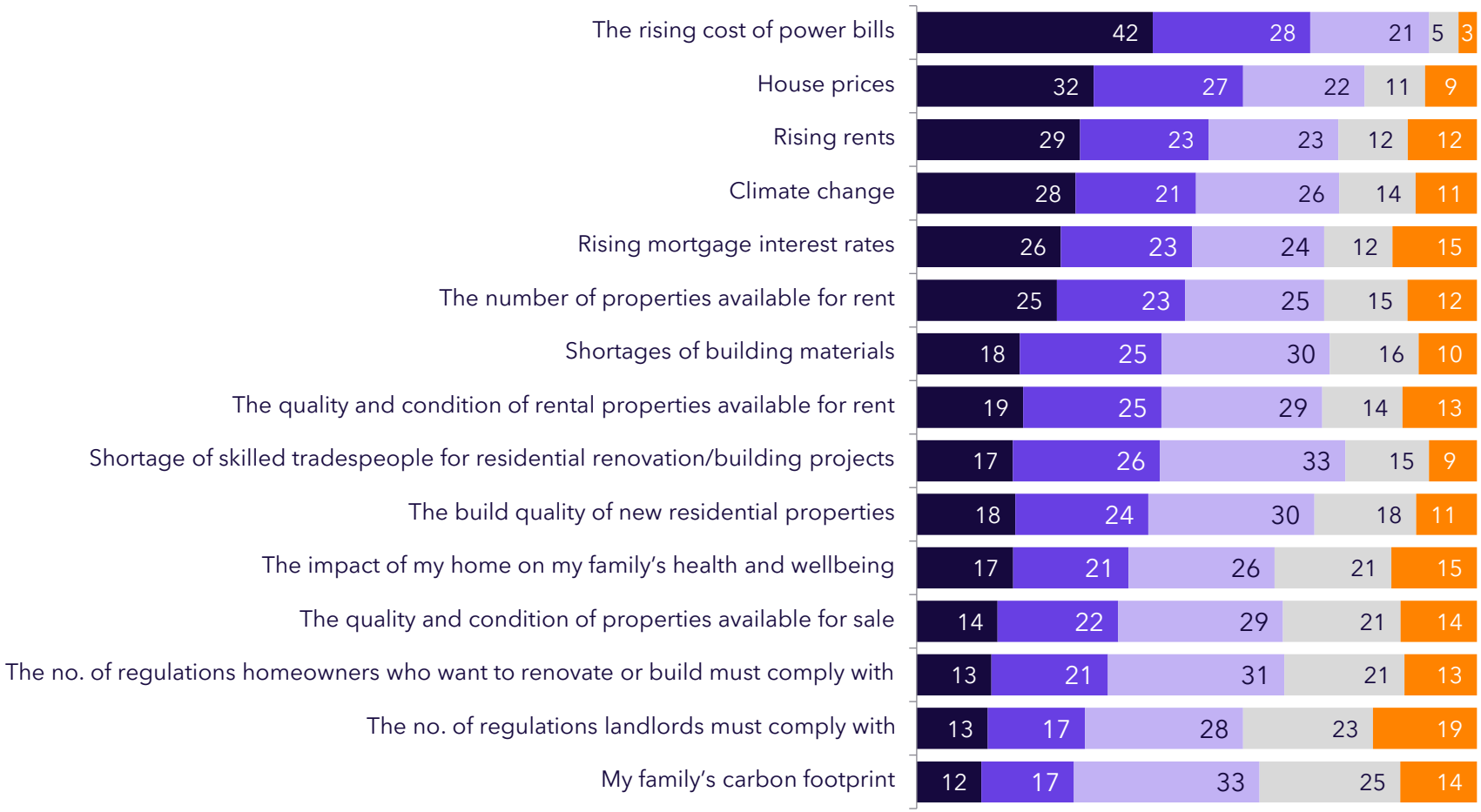
Appendix 2:
Charting & Profiling of Key Questions

Contents:

Key Issues of Concern

The rising cost of living dominated concerns with climate change and rental availability close behind

Key issues of concern (%)



	NETT CONCERNED	% SELECTING INTO TOP 3
The rising cost of power bills	70	58
House prices	58	31
Rising rents	52	32
Climate change	50	33
Rising mortgage interest rates	49	24
The number of properties available for rent	48	17
Shortages of building materials	44	11
The quality and condition of rental properties available for rent	44	9
Shortage of skilled tradespeople for residential renovation/building projects	43	13
The build quality of new residential properties	41	8
The impact of my home on my family's health and wellbeing	38	12
The quality and condition of properties available for sale	36	6
The no. of regulations homeowners who want to renovate or build must comply with	34	7
The no. of regulations landlords must comply with	30	5
My family's carbon footprint	28	9

Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010)

Key Issues of Concern – By Key Demographics (1)

Those aged under 40 had the highest levels of concern about a broad range of topics

% rating as very / extremely concerned		Gender		Age			State/territory				
	Total	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=	2,010	964	1,046	868	759	383	573	523	380	240	294
The rising cost of power bills	70%	65%	75%	66%	73%	74%	73%	68%	71%	67%	73%
House prices	58%	56%	60%	67%	56%	45%	62%	56%	57%	56%	55%
Rising rents	52%	50%	55%	59%	52%	40%	53%	50%	57%	49%	47%
Climate change	50%	47%	52%	56%	46%	45%	50%	48%	52%	54%	45%
Rising mortgage interest rates	49%	47%	52%	60%	46%	34%	50%	49%	50%	46%	49%
The number of properties available for rent	48%	44%	52%	51%	48%	41%	51%	39%	56%	45%	50%
Shortages of building materials	44%	42%	45%	46%	42%	43%	43%	44%	44%	49%	39%
The quality and condition of rental properties for rent	44%	41%	47%	48%	45%	33%	46%	41%	47%	41%	39%
The shortage of skilled tradespeople for residential renovation/building projects	43%	42%	45%	42%	42%	48%	45%	41%	43%	46%	41%
The build quality of new residential properties	41%	41%	42%	44%	41%	36%	43%	43%	39%	43%	34%
The impact of my home on my family's health and wellbeing	38%	36%	40%	45%	38%	22%	40%	36%	41%	36%	31%
The quality and condition of properties for sale	36%	36%	36%	45%	33%	23%	38%	35%	34%	39%	33%
The number of regulations homeowners who want to renovate or build must comply with	34%	36%	33%	37%	34%	28%	37%	34%	34%	32%	26%
The number of regulations landlords must comply with	30%	31%	29%	35%	30%	20%	32%	30%	29%	28%	24%
My family's carbon footprint	28%	26%	30%	36%	25%	17%	30%	29%	26%	29%	22%

Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Key Issues of Concern – By Key Demographics (2)

A metro-regional divide is observed, with those in major cities most concerned about rising house prices, the build quality of new homes, the quality of properties for sale, climate change and carbon footprint

% rating as very / extremely concerned		Metro/Regional		Location				House type		
	Total	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace/town house	Unit / other
n=	2,010	1,438	572	873	565	276	296	1,352	299	359
The rising cost of power bills	70%	70%	72%	70%	70%	72%	72%	72%	63%	70%
House prices	58%	59%	57%	62%	54%	55%	58%	59%	54%	59%
Rising rents	52%	52%	53%	54%	48%	52%	54%	50%	49%	60%
Climate change	50%	52%	43%	54%	49%	51%	35%	51%	47%	50%
Rising mortgage interest rates	49%	50%	45%	51%	50%	45%	46%	50%	50%	47%
The number of properties available for rent	48%	47%	52%	48%	44%	52%	53%	47%	44%	54%
Shortages of building materials	44%	44%	42%	47%	41%	39%	45%	46%	40%	39%
The quality and condition of rental properties for rent	44%	44%	43%	47%	39%	42%	44%	42%	41%	51%
The shortage of skilled tradespeople for residential renovation/building projects	43%	43%	46%	45%	40%	42%	49%	45%	38%	41%
The build quality of new residential properties	41%	43%	36%	46%	39%	35%	36%	41%	39%	45%
The impact of my home on my family's health and wellbeing	38%	39%	35%	41%	36%	37%	33%	36%	37%	44%
The quality and condition of properties for sale	36%	36%	35%	39%	31%	35%	35%	35%	36%	40%
The number of regulations homeowners who want to renovate or build must comply with	34%	35%	33%	36%	32%	29%	37%	34%	35%	36%
The number of regulations landlords must comply with	30%	31%	27%	33%	28%	25%	28%	28%	35%	33%
My family's carbon footprint	28%	30%	23%	32%	26%	25%	21%	27%	34%	28%

Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Key Issues of Concern – By Key Demographics (3)

Those who are financial decision-makers, tenants and those with children at home are more likely to have a higher level of concern about a number of issues

% rating as very /extremely concerned		Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
	Total	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=	2,010	1,865	145	1,197	743	436	1,574	325	1,685	1,404	606
The rising cost of power bills	70%	72%	50%	69%	72%	57%	74%	74%	70%	70%	72%
House prices	58%	59%	47%	52%	66%	57%	59%	60%	58%	55%	67%
Rising rents	52%	53%	41%	38%	72%	42%	55%	58%	51%	51%	55%
Climate change	50%	50%	44%	49%	50%	46%	51%	50%	50%	48%	54%
Rising mortgage interest rates	49%	50%	41%	49%	47%	52%	49%	45%	50%	44%	63%
The number of properties available for rent	48%	49%	35%	37%	63%	43%	49%	53%	47%	46%	52%
Shortages of building materials	44%	45%	33%	46%	40%	49%	43%	49%	43%	41%	52%
The quality & condition of rental properties for rent	44%	44%	37%	33%	59%	40%	45%	52%	42%	42%	48%
Shortage of skilled tradespeople for residential renovation/building projects	43%	45%	30%	46%	40%	47%	42%	51%	42%	42%	47%
The build quality of new residential properties	41%	43%	27%	42%	41%	45%	40%	47%	40%	38%	50%
The impact of my home on my family's health and wellbeing	38%	39%	29%	33%	44%	40%	37%	44%	37%	33%	50%
The quality and condition of properties for sale	36%	37%	30%	32%	41%	44%	34%	38%	36%	33%	45%
The number of regulations homeowners who want to renovate or build must comply with	34%	35%	24%	35%	33%	44%	32%	37%	34%	32%	41%
The number of regulations landlords must comply with	30%	31%	23%	29%	31%	46%	26%	32%	30%	26%	40%
My family's carbon footprint	28%	29%	22%	28%	28%	37%	26%	32%	27%	25%	36%

Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010)
*Sole or shared decision-maker

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Key Issues of Concern – By Key Demographics (4)

Those who are working have the highest levels of concern about a broad range of topics, the financially vulnerable are most concerned about rising prices, rental availability and health, and those who are university educated are most concerned about climate change and carbon footprint

% rating as very /extremely concerned		Education level		Financially vulnerable		Working		Household Income		
	Total	University	School/ College	Yes**	No	Yes	No	Under $65,000	$65,000- $129,999	$130,000 +
n=	2,010	849	1,148	573	1,437	1,222	788	852	618	413
The rising cost of power bills	70%	69%	72%	81%	66%	70%	71%	73%	71%	67%
House prices	58%	62%	56%	64%	56%	64%	50%	55%	61%	59%
Rising rents	52%	53%	52%	64%	47%	56%	47%	54%	54%	45%
Climate change	50%	56%	46%	47%	51%	53%	46%	47%	52%	55%
Rising mortgage interest rates	49%	55%	45%	50%	49%	57%	38%	42%	53%	59%
The number of properties available for rent	48%	46%	50%	59%	43%	49%	46%	52%	46%	45%
Shortages of building materials	44%	46%	42%	42%	44%	47%	39%	41%	43%	50%
The quality and condition of rental properties for rent	44%	44%	43%	55%	39%	45%	41%	45%	45%	41%
The shortage of skilled tradespeople for residential renovation/building projects	43%	43%	44%	41%	44%	45%	41%	42%	46%	46%
The build quality of new residential properties	41%	45%	39%	42%	41%	44%	37%	39%	43%	48%
The impact of my home on my family's health and wellbeing	38%	43%	34%	44%	35%	43%	30%	36%	38%	43%
The quality and condition of properties for sale	36%	40%	33%	34%	37%	41%	29%	32%	39%	40%
The number of regulations homeowners who want to renovate or build must comply with	34%	36%	33%	32%	35%	37%	30%	32%	36%	40%
The number of regulations landlords must comply with	30%	32%	29%	28%	31%	34%	24%	27%	31%	37%
My family's carbon footprint	28%	33%	24%	25%	29%	32%	22%	26%	30%	31%

Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010)
**Having some/a lot of difficulty making ends meet

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Key Issues of Concern – By Key Demographics (5)

Those who had recently built a new home or renovated their home and those who were considering doing so are more likely to have a higher level of concern about a number of issues, particularly to do with housing and building issues

% rating as very /extremely concerned		Recently built a new home / renovated L2Y		Considering building new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
	Total	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
The rising cost of power bills	70%	62%	73%	72%	70%	67%	72%	66%	72%
House prices	58%	60%	58%	71%	53%	68%	55%	62%	57%
Rising rents	52%	46%	54%	56%	51%	58%	50%	49%	53%
Climate change	50%	50%	50%	58%	47%	56%	47%	54%	48%
Rising mortgage interest rates	49%	56%	47%	65%	43%	62%	44%	61%	44%
The number of properties available for rent	48%	45%	49%	52%	46%	52%	46%	49%	48%
Shortages of building materials	44%	54%	40%	57%	38%	56%	39%	55%	39%
The quality and condition of rental properties for rent	44%	44%	44%	45%	43%	49%	42%	44%	43%
The shortage of skilled tradespeople for residential renovation/building projects	43%	52%	41%	52%	40%	54%	40%	51%	40%
The build quality of new residential properties	41%	50%	39%	53%	36%	54%	37%	51%	37%
The impact of my home on my family's health and wellbeing	38%	44%	36%	50%	33%	51%	33%	47%	34%
The quality and condition of properties for sale	36%	46%	33%	47%	31%	51%	30%	44%	33%
The number of regulations homeowners who want to renovate or build must comply with	34%	48%	30%	47%	29%	49%	29%	47%	29%
The number of regulations landlords must comply with	30%	43%	26%	45%	24%	45%	25%	44%	25%
My family's carbon footprint	28%	38%	25%	37%	24%	39%	24%	38%	24%

Q1. How concerned, if at all, are you about the following issues related to housing and energy in Australia?
Base: All participants (n=2,010)

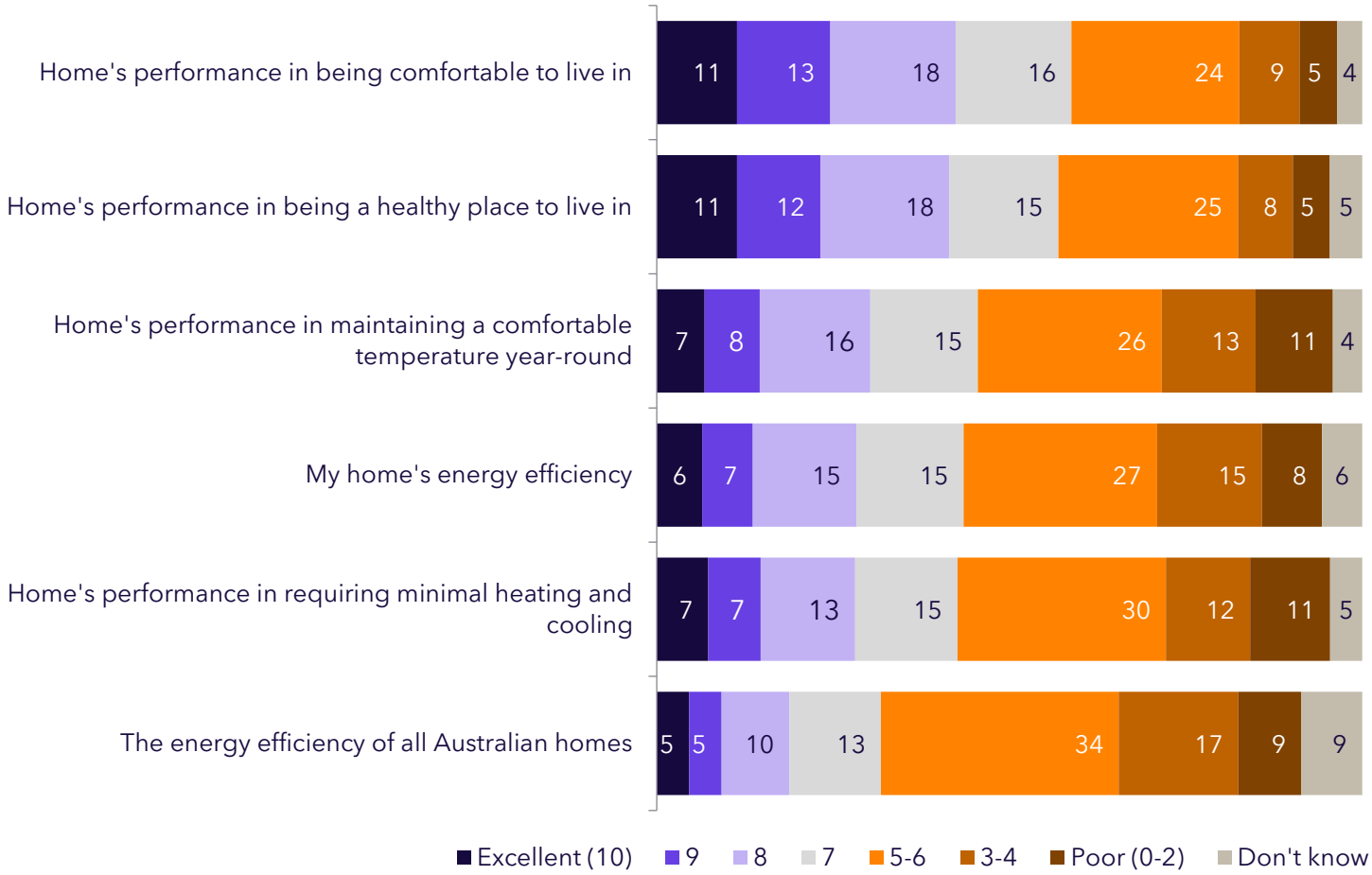
Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Rating of Home Energy Efficiency, Comfort, Health

Participants are mixed in their opinions of their home as being energy efficient and its ability to maintain a comfortable temperature with minimal heating and cooling, but they are rating the energy efficiency of their own home higher than Australian homes overall. Participants are more likely to rate their home as healthy and comfortable than to be energy efficient

Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'

Rating of Perceptions (%)



	NETT GOOD (8+)	NETT POOR (6 or lower)	AVERAGE RATING
Home's performance in being comfortable to live in	42	38	6.8
Home's performance in being a healthy place to live in	42	38	6.8
Home's performance in maintaining a comfortable temperature year-round	30	50	5.9
My home's energy efficiency	28	51	6.0
Home's performance in requiring minimal heating and cooling	28	53	5.9
The energy efficiency of all Australian homes	19	60	5.6

Q6. How would you rate the following?
Base: All participants (n=2,010). Average ratings exclude 'don't know'

Home Energy Efficiency – By Key Demographics (1)

Few significant differences are seen in the ratings provided by different sample cohorts. Older participants and those in major cities appear to be rating their home's energy efficiency as higher than other participants

% rating		Gender		Age			State/territory				
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=	2,010	964	1,046	868	759	383	573	523	380	240	294
Low (0-3)	15%	14%	17%	13%	18%	13%	14%	18%	12%	14%	18%
Medium (4-6)	36%	36%	35%	38%	37%	29%	33%	39%	38%	29%	35%
High (7-8)	30%	32%	27%	28%	28%	36%	30%	27%	30%	36%	29%
Very high (9-10)	14%	13%	14%	15%	11%	17%	16%	11%	14%	15%	10%
Average rating	6.0	6.1	5.9	6.1	5.6	6.4	6.2	5.7	6.1	6.2	5.7

% rating		Metro/Regional		Location				House type		
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace	Unit
n=	2,010	1,438	572	873	565	276	296	1,352	299	359
Low (0-3)	15%	15%	16%	15%	15%	14%	17%	15%	16%	16%
Medium (4-6)	36%	34%	39%	34%	35%	40%	38%	36%	34%	35%
High (7-8)	30%	31%	25%	30%	34%	25%	24%	32%	28%	25%
Very high (9-10)	14%	14%	14%	16%	9%	14%	14%	13%	14%	16%
Average rating	6.0	6.0	5.8	6.1	5.9	5.9	5.8	6.0	6.0	5.8

Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Home Energy Efficiency – By Key Demographics (2)

Home owners, landlords, those with children in home and those who are not financially vulnerable are rating their homes as more energy efficient than other participants

% rating		Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=	2,010	1,865	145	1,197	743	436	1,574	325	1,685	1,404	606
Low (0-3)	15%	15%	19%	10%	23%	11%	16%	23%	14%	16%	12%
Medium (4-6)	36%	36%	34%	34%	36%	35%	36%	34%	36%	35%	37%
High (7-8)	30%	30%	26%	35%	23%	30%	30%	23%	31%	30%	29%
Very high (9-10)	14%	14%	6%	16%	10%	21%	12%	16%	13%	12%	19%
Average rating	6.0	6.0	5.6	6.4	5.3	6.6	5.8	5.6	6.0	5.8	6.3

% rating		Education level		Financially vulnerable		Working		Household Income		
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	University	School/ College	Yes**	No	Yes	No	Under $65,000	$65,000- $129,999	$130,000 +
n=	2,010	849	1,148	573	1,437	1,222	788	852	618	413
Low (0-3)	15%	15%	16%	29%	10%	13%	19%	18%	13%	10%
Medium (4-6)	36%	33%	37%	37%	35%	38%	33%	34%	35%	36%
High (7-8)	30%	33%	28%	19%	34%	30%	29%	27%	35%	32%
Very high (9-10)	14%	16%	12%	5%	17%	15%	12%	13%	13%	18%
Average rating	6.0	6.2	5.8	4.7	6.5	6.2	5.7	5.7	6.2	6.5

Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)
*Sole or shared decision-maker **Having some/a lot of difficulty making ends meet

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Home Energy Efficiency – By Key Demographics (3)

Recent renovators / builders and those considering a new build or renovation were more likely to rate their homes as more energy efficient than other participants

% rating		Recently built a new home / renovated L2Y		Considering building new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
Low (0-3)	15%	11%	17%	9%	18%	10%	17%	10%	17%
Medium (4-6)	36%	30%	37%	34%	36%	29%	38%	35%	36%
High (7-8)	30%	36%	28%	34%	28%	36%	28%	33%	29%
Very high (9-10)	14%	22%	11%	20%	11%	23%	10%	20%	11%
Average rating	6.0	6.7	5.7	6.6	5.7	6.8	5.7	6.6	5.7

Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Average Ratings – By Key Demographics (1)

Older and male participants are more likely to rate the various aspects of their home more highly than other cohorts

Average rating		Gender		Age			State/territory				
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=	2,010	964	1,046	868	759	383	573	523	380	240	294
The energy efficiency of their home	6.0	6.1	5.9	6.1	5.6	6.4	6.2	5.7	6.1	6.2	5.7
The energy efficiency of all Australian homes	5.6	5.7	5.4	5.9	5.3	5.4	5.8	5.5	5.5	5.6	5.3
How well home maintains a comfortable year-round temperature	5.9	6.2	5.7	6.1	5.5	6.5	6.0	5.7	6.1	6.1	5.8
How home performs on requiring minimal heating/ cooling	5.9	6.1	5.8	6.0	5.6	6.2	5.9	5.8	6.2	5.9	5.8
How healthy their home is	6.8	6.9	6.6	6.7	6.4	7.5	6.8	6.4	7.1	6.9	6.8
How comfortable their home is	6.8	7.0	6.6	6.7	6.5	7.4	6.8	6.6	7.1	6.9	6.8

Q6. How would you rate the following?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Average Ratings – By Key Demographics (2)

Those in major cities are more likely to consider their home to be better at maintaining a comfortable year-round temperature with the minimum of heating and cooling

Average rating		Metro/Regional		Location				House type		
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace	Unit
n=	2,010	1,438	572	873	565	276	296	1,352	299	359
The energy efficiency of their home	6.0	6.0	5.8	6.1	5.9	5.9	5.8	6.0	6.0	5.8
The energy efficiency of all Australian homes	5.6	5.6	5.4	5.8	5.4	5.5	5.3	5.5	5.8	5.7
How well home maintains a comfortable year-round temperature	5.9	6.0	5.8	6.1	5.8	6.0	5.7	6.0	5.8	5.9
How home performs on requiring minimal heating/ cooling	5.9	6.0	5.8	6.2	5.6	5.9	5.7	5.9	5.9	6.0
How healthy their home is	6.8	6.7	6.8	6.8	6.7	6.8	6.8	6.9	6.5	6.6
How comfortable their home is	6.8	6.8	6.8	6.8	6.7	6.8	6.9	6.9	6.4	6.7

Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Average Ratings – By Key Demographics (3)

Homeowners and landlords are more likely than other participants to rate their home higher than other participants

Average rating		Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=	2,010	1,865	145	1,197	743	436	1,574	325	1,685	1,404	606
The energy efficiency of their home	6.0	6.0	5.6	6.4	5.3	6.6	5.8	5.6	6.0	5.8	6.3
The energy efficiency of all Australian homes	5.6	5.6	5.0	5.7	5.3	6.2	5.4	5.5	5.6	5.4	6.0
How well home maintains a comfortable year-round temperature	5.9	5.9	5.9	6.4	5.3	6.6	5.8	5.5	6.0	5.9	6.1
How home performs on requiring minimal heating/ cooling	5.9	5.9	5.6	6.4	5.2	6.6	5.7	5.6	6.0	5.8	6.1
How healthy their home is	6.8	6.8	6.4	7.2	6.0	7.0	6.7	6.3	6.8	6.8	6.7
How comfortable their home is	6.8	6.8	6.6	7.2	6.0	7.0	6.7	6.3	6.9	6.8	6.9

Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)
*Sole or shared decision-maker

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Average Ratings – By Key Demographics (4)

Those who are not financially vulnerable, higher income earners and those who are working provide higher ratings than other participants

Average rating		Education level		Financially vulnerable		Working		Household Income		
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	University	School/ College	Yes**	No	Yes	No	Under $65,000	$65,000- $129,999	$130,000 +
n=	2,010	849	1,148	573	1,437	1,222	788	852	618	413
The energy efficiency of their home	6.0	6.2	5.8	4.7	6.5	6.2	5.7	5.7	6.2	6.5
The energy efficiency of all Australian homes	5.6	5.8	5.4	4.7	5.9	5.8	5.2	5.4	5.8	5.8
How well home maintains a comfortable year-round temperature	5.9	6.2	5.8	4.6	6.5	6.1	5.7	5.6	6.2	6.5
How home performs on requiring minimal heating/ cooling	5.9	6.1	5.7	4.6	6.4	6.1	5.6	5.6	6.1	6.5
How healthy their home is	6.8	6.9	6.6	5.8	7.1	6.8	6.7	6.5	7.0	7.1
How comfortable their home is	6.8	6.9	6.7	5.8	7.2	6.9	6.6	6.6	6.9	7.2

Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)
**Having some/a lot of difficulty making ends meet

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Average Ratings – By Key Demographics (5)

Recent renovators / builders and those considering a new build or renovation gave higher ratings than other participants

Average rating		Recently built a new home / renovated L2Y		Considering buying new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
Ratings are based on a scale of 0-10 where 0 is 'very poor' and 10 is 'excellent'	**Total**	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
The energy efficiency of their home	6.0	6.7	5.7	6.6	5.7	6.8	5.7	6.6	5.7
The energy efficiency of all Australian homes	5.6	6.3	5.3	6.3	5.2	6.4	5.2	6.2	5.3
How well home maintains a comfortable year-round temperature	5.9	6.8	5.7	6.7	5.6	6.7	5.7	6.7	5.6
How home performs on requiring minimal heating/ cooling	5.9	6.8	5.6	6.7	5.6	6.8	5.6	6.7	5.6
How healthy their home is	6.8	7.2	6.6	7.2	6.6	7.2	6.6	7.1	6.6
How comfortable their home is	6.8	7.2	6.7	7.2	6.6	7.2	6.6	7.2	6.6

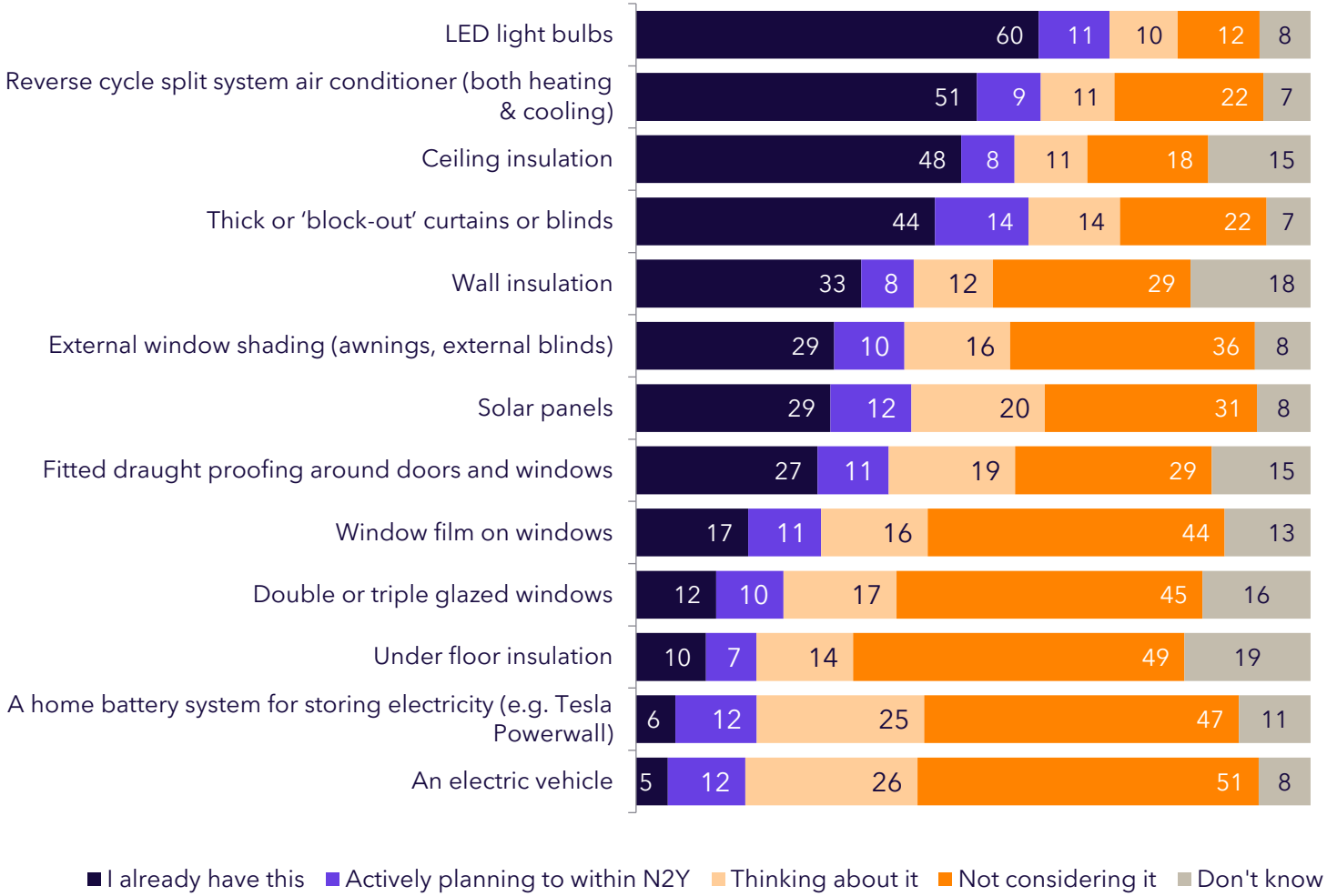
Q6. How would you rate the following [the energy efficiency of the home you live in]?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Energy Efficiency Features – Already Fitted/ Planning to

The majority of participants have LED light bulbs and A/C but the situation is more mixed around other energy efficiency measures, even relatively low-cost features such as block-out blinds, draught proofing and window film

Energy Efficiency Features Currently Have Fitted or Considering (%)



NETT HAVE IT/ ACTIVELY PLANNING TO		
ALL	HOMEOWNERS	RENTERS
70	78	59
60	71	45
56	70	35
58	66	47
41	50	27
40	48	27
41	54	21
37	46	26
27	34	19
22	27	15
18	20	14
18	23	11
16	21	10

Q7. Does the home you live in have the following features fitted or are you considering buying/installing them within the next two years?
Base: All participants (n=2,010)
N2Y = Next 2 years

Energy Efficiency Features – Already Fitted/ Planning to – By Key Demographics

% rating		Recently built a new home / renovated L2Y		Considering buying new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
	Total	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
LED light bulbs	70%	71%	70%	74%	69%	72%	70%	74%	69%
Reverse cycle split system air conditioner (both heating & cooling)	60%	64%	59%	64%	58%	61%	60%	65%	58%
Ceiling insulation	56%	63%	54%	60%	55%	58%	56%	63%	53%
Thick or 'block-out' curtains or blinds	58%	63%	57%	66%	55%	64%	56%	65%	56%
Wall insulation	41%	58%	36%	54%	36%	55%	36%	57%	35%
External window shading (awnings, external blinds)	40%	53%	36%	53%	35%	50%	36%	54%	34%
Solar panels	41%	59%	35%	53%	36%	53%	36%	56%	35%
Fitted draught proofing around doors and windows	37%	51%	33%	44%	35%	45%	35%	48%	33%
Window film on windows	27%	47%	21%	41%	22%	41%	23%	46%	20%
Double or triple glazed windows	22%	44%	15%	34%	17%	38%	16%	39%	15%
Under floor insulation	18%	38%	12%	29%	13%	31%	13%	35%	11%
A home battery system for storing electricity (e.g. Tesla Powerwall)	18%	39%	11%	31%	12%	36%	11%	35%	11%
An electric vehicle	16%	38%	9%	31%	10%	33%	10%	35%	9%

Q7. Does the home you live in have the following features fitted or are you considering buying/installing them within the next two years?
Base: All participants (n=2,010)
N2Y = Next 2 years

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Rating of Home Energy Efficiency (EE) by What is Installed

Analysis of energy efficiency ratings by the features people have installed reveals some observable skews. Those with wall and floor insulation, draught proofing and solar panels provided slightly higher ratings

% rating EE of their home	NET – has at least one of these installed	Ceiling insulation installed	Wall insulation installed	Under floor insulation installed	Draught proofing installed	Glazing/ film installed	Reverse cycle A/C installed	Window shading installed	Block-out curtains or blinds installed
n=	1,452	994	700	227	550	480	1,014	603	905
Low (0-3)	14	11	8	8	8	10	13	10	12
Medium (4-6)	35	**35**	**34**	24	29	26	**35**	31	**35**
High (7-8)	31	35	35	36	**38**	**38**	33	34	31
Very high (9-10)	16	17	21	**31**	23	23	15	21	18
Average rating	6.1	6.4	**6.7**	**7.1**	**6.8**	**6.8**	6.2	6.6	6.3

Q6. How would you rate the following [the energy efficiency of the home you live in)?
Q7. Does the home you live in have the following features fitted?
Base: All participants (n=2,010)

Energy Efficiency Knowledge – By Key Demographics (1)

Males, those in NSW/ACT, in metro areas and major cities claim to have more knowledge about energy efficiency

% rating		Gender		Age			State/territory				
	Total	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=	2,010	964	1,046	868	759	383	573	523	380	240	294
Unaware	4	2	5	4	4	1	3	4	2	4	6
Aware only	13	10	16	13	14	11	14	11	14	12	15
Some knowledge	50	48	52	47	50	56	44	54	56	49	49
Fair/a lot of knowledge	33	39	28	36	31	31	39	31	28	35	29

% rating		Metro/Regional		Location				House type		
	Total	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace	Unit
n=	2,010	1,438	572	873	565	276	296	1,352	299	359
Unaware	4	4	2	4	4	1	2	4	4	4
Aware only	13	12	15	11	15	14	15	12	14	14
Some knowledge	50	48	55	46	53	59	52	50	51	50
Fair/a lot of knowledge	33	35	28	39	28	26	31	34	31	32

Q5. How much would you say you know about the topic of home energy efficiency? (Shown prior to seeing a definition of the term)
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Energy Efficiency Knowledge – By Key Demographics (2)

Financial decision-makers, homeowners, landlords and those with a university education are more likely to claim they have a lot of knowledge about Energy Efficiency

% rating		Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
	Total	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=	2,010	1,865	145	1,197	743	436	1,574	325	1,685	1,404	606
Unaware	4	2	18	2	5	2	4	2	4	4	2
Aware only	13	12	28	11	15	8	14	13	13	14	11
Some knowledge	50	51	43	49	53	34	54	53	50	51	47
Fair/a lot of knowledge	33	35	11	38	28	56	28	32	34	31	40

% rating		Education level		Financially vulnerable		Working		Household Income		
	Total	University	School/ College	Yes**	No	Yes	No	Under $65,000	$65,000- $129,999	$130,000 +
n=	2,010	849	1,148	573	1,437	1,222	788	852	618	413
Unaware	4	2	4	4	3	3	4	5	2	2
Aware only	13	10	16	19	11	12	15	15	10	8
Some knowledge	50	47	52	55	48	48	53	52	52	43
Fair/a lot of knowledge	33	41	27	21	38	38	27	28	37	47

Q5. How much would you say you know about the topic of home energy efficiency? (Shown prior to seeing a definition of the term)
Base: All participants (n=2,010)
*Sole or shared decision-maker **Having some/a lot of difficulty making ends meet

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Energy Efficiency Knowledge – By Key Demographics (3)

Recent renovators / builders and those considering a new build or renovation felt much more knowledgeable about energy efficiency

% rating		Recently built a new home / renovated L2Y		Considering buying new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
	Total	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
Unaware	4	1	4	3	4	3	4	1	4
Aware only	13	5	15	8	15	6	15	7	16
Some knowledge	50	37	54	41	54	41	54	38	55
Fair/a lot of knowledge	33	57	26	48	27	50	27	54	25

Q5. How much would you say you know about the topic of home energy efficiency? (Shown prior to seeing a definition of the term)
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (1)

Improving building standards for new homes and major renovations: Those under 40 are less likely to be in support

% rating		Gender		Age			State/territory				
	Total	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=	2,010	964	1,046	868	759	383	573	523	380	240	294
Strongly support	40%	37%	42%	34%	40%	51%	43%	38%	39%	43%	34%
Somewhat support	32%	33%	30%	31%	33%	30%	29%	34%	35%	28%	31%
Neither	24%	25%	23%	28%	24%	16%	23%	25%	23%	23%	30%
Somewhat oppose	3%	4%	2%	5%	2%	2%	4%	3%	2%	6%	3%
Strongly oppose	1%	1%	2%	2%	1%	1%	2%	1%	1%	0%	2%
NET support	71%	70%	73%	65%	74%	81%	72%	72%	73%	71%	65%
NET oppose	5%	5%	4%	7%	3%	3%	6%	3%	4%	6%	5%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (2)

Improving building standards for new homes and major renovations: Those in remote areas were less likely to support

% rating		Metro/Regional		Location				House type		
	Total	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace	Unit
n=	2,010	1,438	572	873	565	276	296	1,352	299	359
Strongly support	40%	41%	36%	43%	38%	40%	32%	40%	32%	45%
Somewhat support	32%	32%	31%	31%	33%	31%	31%	32%	29%	33%
Neither	24%	22%	29%	21%	24%	26%	32%	24%	33%	20%
Somewhat oppose	3%	4%	2%	4%	3%	3%	2%	3%	6%	2%
Strongly oppose	1%	1%	1%	1%	1%	0%	2%	1%	1%	2%
NET support	71%	73%	67%	74%	71%	71%	63%	72%	61%	77%
NET oppose	5%	5%	4%	5%	4%	3%	5%	5%	6%	3%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (4)

Improving building standards for new homes and major renovations: Landlords are less likely to be in support

% rating		Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
	Total	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=	2,010	1,865	145	1,197	743	436	1,574	325	1,685	1,404	606
Strongly support	40%	41%	29%	41%	37%	33%	42%	44%	39%	41%	37%
Somewhat support	32%	33%	19%	32%	32%	28%	32%	28%	32%	31%	32%
Neither	24%	22%	44%	23%	26%	32%	22%	23%	24%	23%	26%
Somewhat oppose	3%	3%	5%	3%	3%	6%	3%	4%	3%	3%	3%
Strongly oppose	1%	1%	4%	1%	2%	1%	1%	2%	1%	1%	2%
NET support	71%	73%	48%	73%	69%	60%	74%	71%	71%	72%	69%
NET oppose	5%	4%	9%	5%	5%	7%	4%	6%	4%	4%	5%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this? Base: All participants (n=2,010)
*Sole or shared decision-maker

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (5)

Improving building standards for new homes and major renovations: Recent builders/renovators were much less likely to support whereas those considering a new build or renovation were more likely to support

% rating		Recently built a new home / renovated L2Y		Considering buying new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
	Total	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
Strongly support	40%	33%	42%	43%	38%	40%	40%	37%	41%
Somewhat support	32%	30%	32%	33%	31%	29%	33%	32%	31%
Neither	24%	28%	23%	17%	27%	23%	24%	23%	24%
Somewhat oppose	3%	8%	2%	6%	2%	6%	2%	6%	2%
Strongly oppose	1%	2%	1%	1%	2%	1%	1%	1%	1%
NET support	71%	63%	74%	76%	69%	69%	72%	69%	72%
NET oppose	5%	9%	3%	7%	4%	8%	4%	8%	3%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this? Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (1)

Programs to improve the EE of existing homes including rental properties: Those under 40 are less likely to be in support

% rating		Gender		Age			State/territory				
	Total	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=	2,010	964	1,046	868	759	383	573	523	380	240	294
Strongly support	40%	36%	44%	35%	42%	50%	42%	38%	43%	39%	38%
Somewhat support	32%	33%	30%	31%	32%	32%	30%	32%	34%	33%	31%
Neither	22%	24%	20%	26%	22%	14%	21%	24%	20%	24%	26%
Somewhat oppose	4%	4%	3%	6%	2%	2%	5%	4%	2%	3%	2%
Strongly oppose	2%	2%	2%	2%	2%	2%	3%	1%	1%	1%	3%
NET support	72%	70%	74%	66%	74%	82%	72%	70%	77%	72%	69%
NET oppose	6%	6%	5%	8%	4%	4%	7%	5%	3%	5%	6%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (2)

Programs to improve the EE of existing homes including rental properties: Those in a semi-detached home or terrace are less likely to support

% rating		Metro/Regional		Location				House type		
	Total	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace	Unit
n=	2,010	1,438	572	873	565	276	296	1,352	299	359
Strongly support	40%	41%	38%	41%	42%	41%	35%	40%	32%	49%
Somewhat support	32%	32%	32%	32%	30%	33%	31%	33%	29%	29%
Neither	22%	21%	26%	20%	23%	26%	26%	21%	32%	20%
Somewhat oppose	4%	4%	1%	5%	3%	0%	3%	4%	6%	2%
Strongly oppose	2%	2%	2%	2%	2%	1%	4%	3%	1%	1%
NET support	72%	73%	70%	73%	72%	73%	67%	73%	61%	77%
NET oppose	6%	6%	4%	7%	5%	1%	7%	6%	7%	3%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this?
Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (3)

Programs to improve the EE of existing homes including rental properties: Landlords and those not responsible for financial decisions in the home are less likely to be in support

% rating		Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
	Total	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=	2,010	1,865	145	1,197	743	436	1574	325	1,685	1,404	606
Strongly support	40%	41%	36%	38%	42%	30%	43%	43%	40%	42%	36%
Somewhat support	32%	33%	22%	34%	29%	32%	32%	26%	33%	31%	34%
Neither	22%	21%	32%	21%	24%	27%	21%	23%	22%	22%	23%
Somewhat oppose	4%	4%	3%	4%	2%	8%	3%	5%	3%	3%	6%
Strongly oppose	2%	2%	7%	2%	2%	2%	2%	3%	2%	2%	1%
NET support	72%	73%	57%	72%	72%	62%	75%	69%	73%	73%	69%
NET oppose	6%	5%	10%	7%	4%	10%	4%	8%	5%	5%	7%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this? Base: All participants (n=2,010)
*Sole or shared decision-make

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (4)

Programs to improve the EE of existing homes including rental properties: results were fairly comparable among these segments

% rating		Education level		Financially vulnerable		Working		Household Income		
	Total	University	School/ College	Yes**	No	Yes	No	Under $65,000	$65,000- $129,999	$130,000 +
n=	2,010	849	1,148	573	1,437	1,222	788	852	618	413
Strongly support	40%	43%	39%	45%	39%	37%	45%	44%	36%	42%
Somewhat support	32%	32%	32%	26%	34%	35%	28%	27%	37%	36%
Neither	22%	19%	24%	24%	22%	23%	21%	23%	21%	18%
Somewhat oppose	4%	4%	3%	2%	4%	4%	3%	3%	5%	3%
Strongly oppose	2%	2%	2%	3%	2%	2%	2%	2%	2%	1%
NET support	72%	75%	71%	71%	73%	72%	73%	71%	73%	78%
NET oppose	6%	6%	5%	5%	6%	6%	6%	5%	7%	4%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this? Base: All participants (n=2,010)
***Having some/a lot of difficulty making ends meet

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Initial Reactions to Reforms – By Key Demographics (5)

Programs to improve the EE of existing homes including rental properties: Recent builders/renovators were much less likely to support whereas those considering a new build or renovation were more likely to support

% rating		Recently built a new home / renovated L2Y		Considering buying new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
	Total	Yes	No	Yes	No	Yes	No	Yes	No
n=	2,010	581	1429	673	1337	649	1361	694	1316
Strongly support	40%	29%	44%	41%	40%	37%	42%	34%	43%
Somewhat support	32%	35%	31%	36%	30%	33%	31%	35%	30%
Neither	22%	25%	21%	18%	24%	21%	23%	23%	22%
Somewhat oppose	4%	9%	2%	4%	3%	7%	2%	6%	3%
Strongly oppose	2%	2%	2%	1%	2%	2%	2%	2%	2%
NET support	72%	63%	75%	77%	70%	70%	73%	69%	73%
NET oppose	6%	11%	4%	5%	6%	9%	4%	8%	5%

Q3. Australian State and Federal Governments are considering how to improve the energy efficiency of all Australian homes. Overall, how much do you support or oppose the following ways to do this? Base: All participants (n=2,010)

Significantly higher than other sub-groups @ 95%
Significantly lower than other sub-groups @ 95%

Level of Support – By Key Demographics (1)

Older participants are more likely to be in support of most of the proposals

% rating			Gender		Age			State/territory				
		Total	Male	Female	Under 40	40-64	65+	NSW/ ACT	Vic/ Tas	Qld	WA	SA/ NT
n=		2,010	964	1,046	868	759	383	573	523	380	240	294
1. Increasing thermal efficiency of new homes	% support	73	73	73	69	72	84	72	73	78	76	65
	% oppose	3	4	2	4	3	2	4	4	2	2	6
2. Increasing standards for major renovations	% support	70	70	69	66	69	76	72	68	73	67	60
	% oppose	6	7	5	8	5	4	6	5	5	4	7
3. Minimum standards for rental homes	% support	70	69	70	67	70	74	70	69	73	68	65
	% oppose	7	8	6	8	7	5	8	7	6	7	7
4. Mandating EE disclosure	% support	66	67	65	65	66	67	66	64	67	69	65
	% oppose	8	9	8	6	9	12	9	11	6	5	7
5. Government retrofit for social housing	% support	73	70	77	68	74	83	77	69	76	71	70
	% oppose	6	9	4	7	5	5	6	8	5	6	4
6. Incentives for homeowners and landlords	% support	75	76	75	69	77	85	75	73	79	75	72
	% oppose	6	7	5	7	5	3	6	7	5	5	3

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010)

Level of Support – By Key Demographics (2)

Those in detached houses are more likely to be supportive of proposals to incentivise homeowners and landlords

% rating			Metro/Regional		Location				House type		
		Total	Metro	Regional	Major City	Outskirts of Major City	Regional Centre	Regional/ Remote area	Detached house	Semi/ terrace	Unit
n=		2,010	1,438	572	873	565	276	296	1,352	299	359
1. Increasing thermal efficiency of new homes	% support	73	74	72	75	71	76	69	74	67	75
	% oppose	3	3	3	3	4	2	4	3	5	2
2. Increasing standards for major renovations	% support	70	71	65	73	68	70	61	70	64	71
	% oppose	6	6	6	5	7	4	7	6	7	4
3. Minimum standards for rental homes	% support	70	71	66	73	67	71	63	70	64	73
	% oppose	7	7	7	6	8	6	7	7	7	5
4. Mandating EE disclosure	% support	66	67	62	68	65	69	56	66	60	70
	% oppose	8	8	9	7	10	6	12	9	11	5
5. Government retrofit for social housing	% support	73	74	71	74	73	74	69	74	65	78
	% oppose	6	6	6	6	7	5	7	6	8	4
6. Incentives for homeowners and landlords	% support	75	76	72	77	76	73	71	78	62	76
	% oppose	6	5	7	5	4	8	6	5	10	5

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010)

Level of Support – By Key Demographics (3)

Financial decision-makers are more likely to be in support of most of the proposals

% rating			Financial decision maker for home		Home tenure type		Landlord		Disability		Family status	
		Total	Yes*	No	Owner/ mortgagee	Tenant	Yes	No	Yes	No	No kids at home	Kids at home
n=		2,010	1,865	145	1,197	743	436	1,574	325	1,685	1,404	606
1. Increasing thermal efficiency of new homes	% support	73	75	50	78	66	73	73	72	73	73	74
	% oppose	3	3	5	3	4	5	3	4	3	3	2
2. Increasing standards for major renovations	% support	70	71	48	74	64	72	69	67	70	69	71
	% oppose	6	6	7	5	6	7	5	7	5	6	6
3. Minimum standards for rental homes	% support	70	72	48	69	71	66	70	73	69	69	72
	% oppose	7	7	6	7	6	9	6	8	7	7	7
4. Mandating EE disclosure	% support	66	67	50	64	67	65	66	64	66	65	69
	% oppose	8	9	6	10	6	10	8	11	8	9	6
5. Government retrofit for social housing	% support	73	75	53	73	74	67	75	74	73	74	71
	% oppose	6	6	9	6	5	8	6	7	6	6	7
6. Incentives for homeowners and landlords	% support	75	77	60	77	72	70	77	76	75	76	73
	% oppose	6	6	5	5	6	8	5	6	5	5	6

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010)
*Sole or shared decision-maker

Level of Support – By Key Demographics (4)

Higher income, university educated participants are more likely to be in support of the proposals

% rating			Education level		Financially vulnerable		Working		Household Income		
		Total	University	School/ College	Yes**	No	Yes	No	Under $65,000	$65,000- $129,999	$130,000 +
n=		2,010	849	1,148	573	1437	1,222	788	852	618	413
1. Increasing thermal efficiency of new homes	% support	73	79	69	68	76	73	74	72	74	81
	% oppose	3	3	3	4	3	4	2	3	4	2
2. Increasing standards for major renovations	% support	70	74	66	65	71	70	68	67	71	77
	% oppose	6	6	6	5	6	6	5	5	6	6
3. Minimum standards for rental homes	% support	70	70	70	67	71	71	68	70	71	75
	% oppose	7	8	6	7	7	8	6	6	7	7
4. Mandating EE disclosure	% support	66	70	63	63	67	68	62	63	66	76
	% oppose	8	7	9	11	8	7	11	10	8	5
5. Government retrofit for social housing	% support	73	76	72	74	73	72	75	73	76	78
	% oppose	6	5	6	5	7	7	5	4	6	8
6. Incentives for homeowners and landlords	% support	75	79	73	73	76	75	75	73	77	81
	% oppose	6	5	6	5	6	6	4	5	5	5

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010)
**Having some/a lot of difficulty making ends meet

Level of Support – By Key Demographics (5)

Those considering a new build or renovation were most likely to support the various aspects of the reforms

% rating			Recently built a new home / renovated L2Y		Considering building new home / renovating N5Y		Builders (having built/ planning a new build)		Renovators (having done/ planning a renovation)	
		Total	Yes	No	Yes	No	Yes	No	Yes	No
n=		2,010	581	1429	673	1337	649	1361	694	1316
1. Increasing thermal efficiency of new homes	% support	73	76	72	81	70	78	72	79	71
	% oppose	3	6	2	5	3	5	2	5	3
2. Increasing standards for major renovations	% support	70	71	69	78	66	75	68	75	67
	% oppose	6	8	5	6	6	7	5	6	6
3. Minimum standards for rental homes	% support	70	70	69	74	68	72	69	71	69
	% oppose	7	10	6	7	7	9	6	8	7
4. Mandating EE disclosure	% support	66	68	65	73	63	68	65	71	64
	% oppose	8	6	9	7	9	7	9	6	9
5. Government retrofit for social housing	% support	73	72	74	78	71	74	73	74	73
	% oppose	6	7	6	6	6	6	6	7	6
6. Incentives for homeowners and landlords	% support	75	73	76	80	73	75	75	75	75
	% oppose	6	9	4	5	6	7	5	6	5

Q8. How strongly do you support or oppose each of the following proposals?
Base: All participants (n=2,010)

Contact

SEC Newgate Australia Pty Ltd ABN 38 162 366 056
Level 15, 167 Macquarie Street
Sydney NSW 2000
T +61 2 9232 9500

E: sydney@secnewgate.com.au
W: secnewgate.com.au