

ENERGY CONSUMER BEHAVIOUR SURVEY

Household Topline Results
October 2023

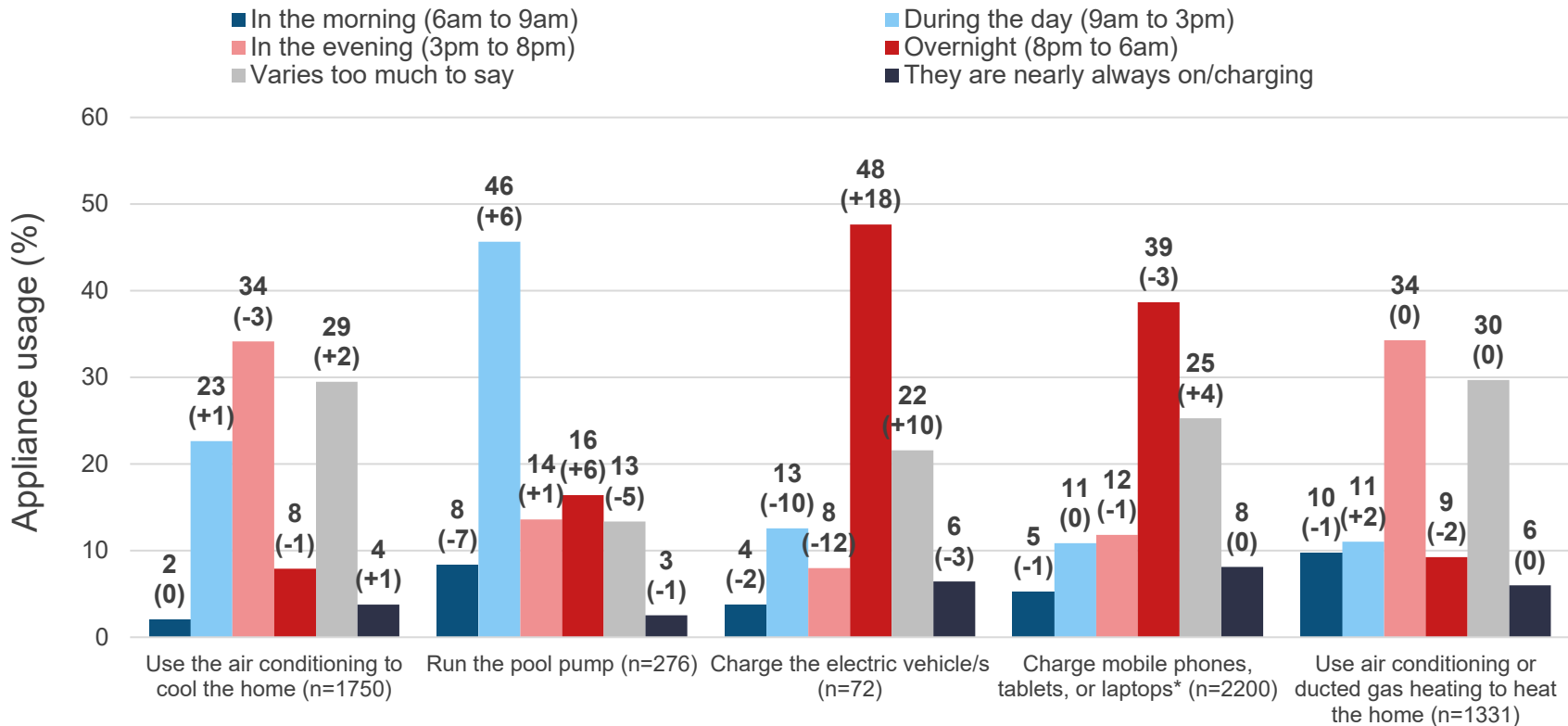


Changing Behaviour

- Households typically use energy during the day to run the washing machine (49% of households with appliance), the pool pump (46%), and the clothes dryer (37%). Air conditioning (for heating and cooling) is mostly turned on in the evening (both 34%). EVs and electrical appliances are typically charged overnight (48% and 39% respectively).
- 31% of households who charge electrical appliances during peak times say it would be very easy to switch their usage to off-peak times. Around one quarter also said it would be very easy to switch usage times for their washing machine, dishwasher and clothes dryer. Air conditioning usage is seen as the most difficult to change, with 36% saying it would be quite or very difficult to switch for cooling and 34% for heating purposes.
- Just 12% of households say they would definitely use smart devices to control energy use in the future. 27% say they probably would and 31% are on the fence.



Electrical appliance use – 1



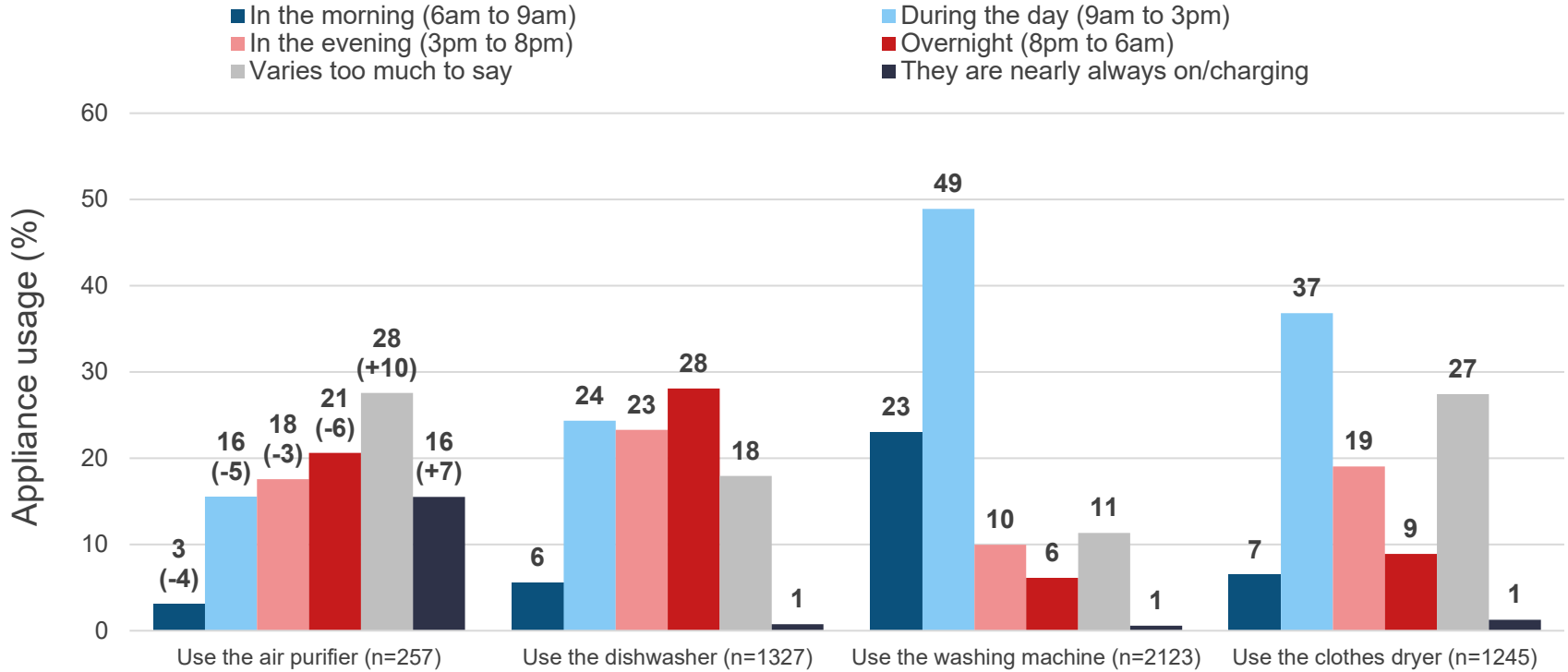
Q: Typically, at what time of the day does your household do these following activities? If the time varies, please tell me when they are done most often.

Base size: All households who have each appliance

Results suppressed for any product with sample size <50

* Asked to all participants

Electrical appliance use – 2

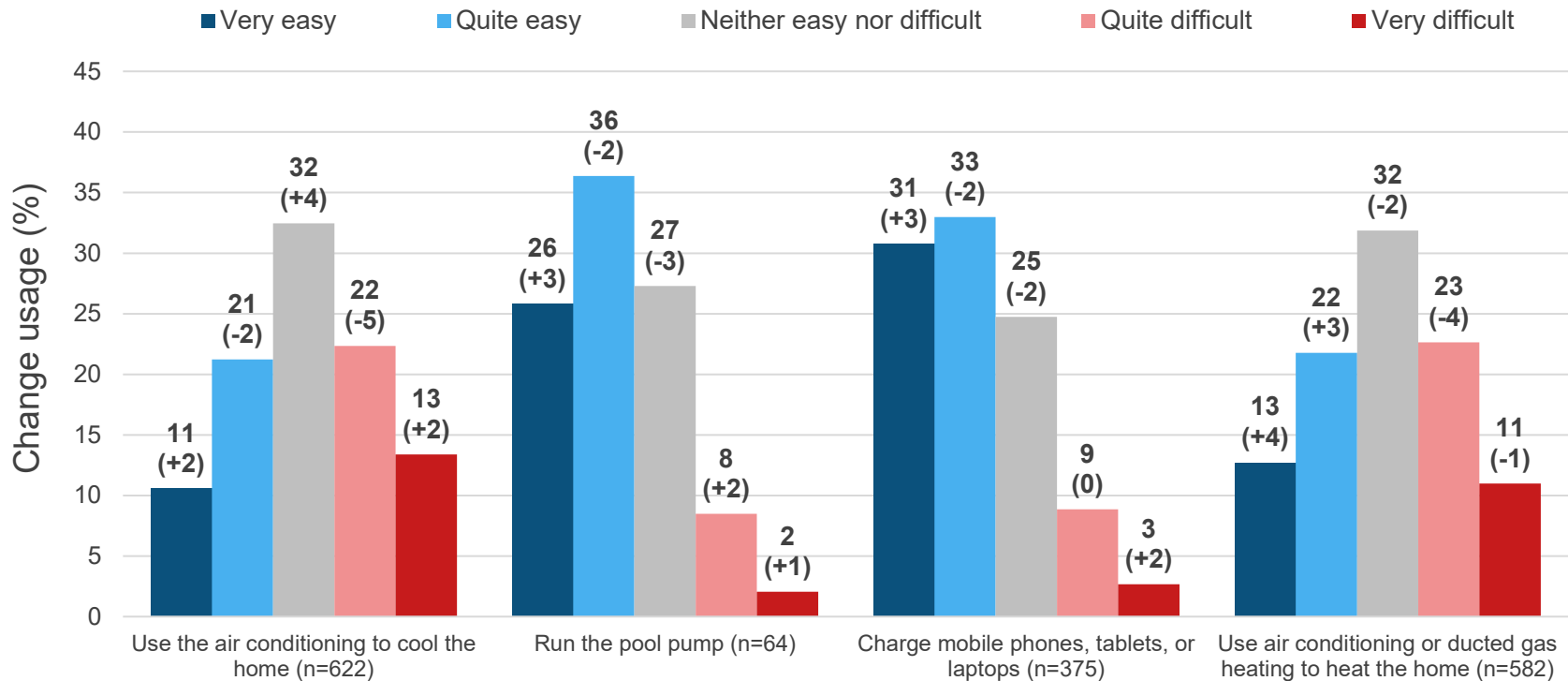


Q: Typically, at what time of the day does your household do these following activities? If the time varies, please tell me when they are done most often.

Base size: All households who have each appliance

Results suppressed for any product with sample size <50.

Difficulty to change electrical appliance use – 1

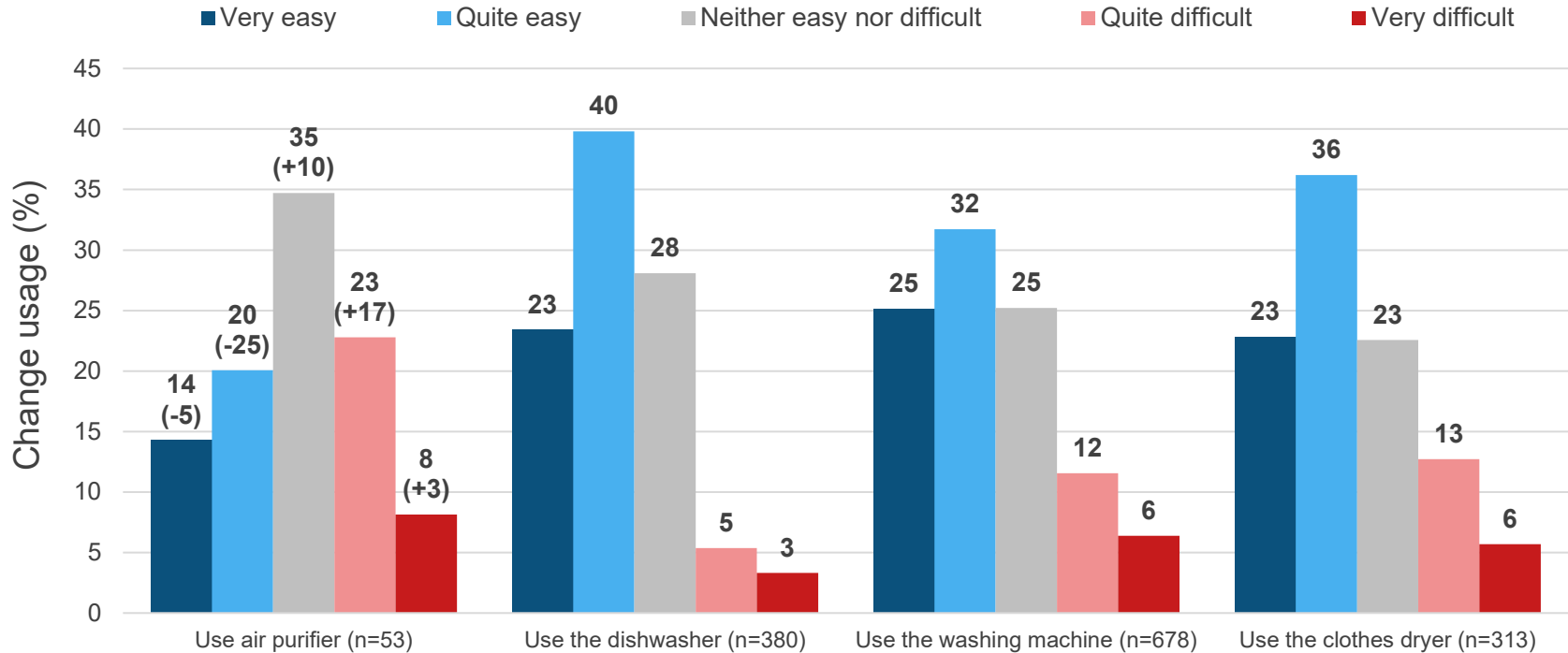


Q: How easy or difficult would it be for your household to change when you do these things to a time when there is less demand for energy (e.g. to the middle of the day or overnight)?

Base size: All households who have each appliance and use at peak times

Results suppressed for any product with sample size <50

Difficulty to change electrical appliance use – 2

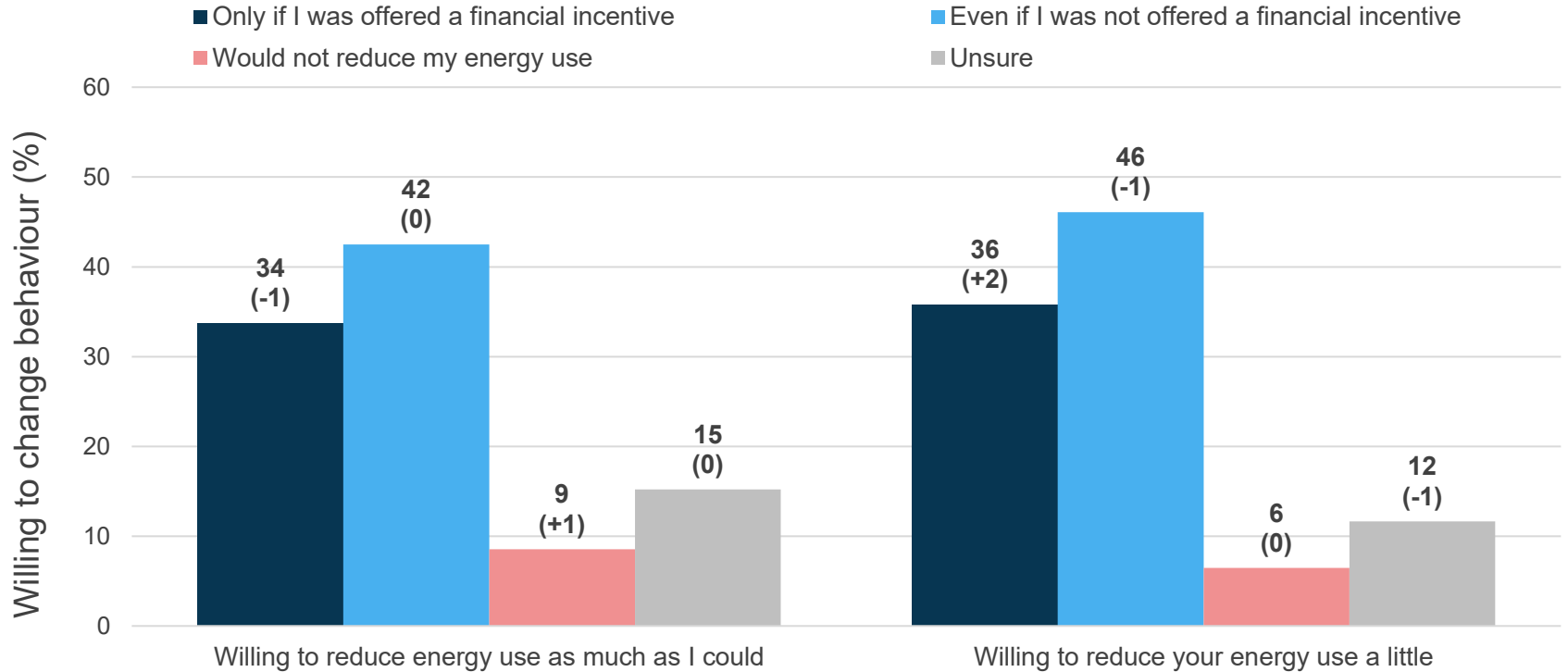


Q: How easy or difficult would it be for your household to change when you do these things to a time when there is less demand for energy (e.g. to the middle of the day or overnight)?

Base size: All households who have each appliance and use at peak times

Results suppressed for any product with sample size <50

Willingness to change behaviour

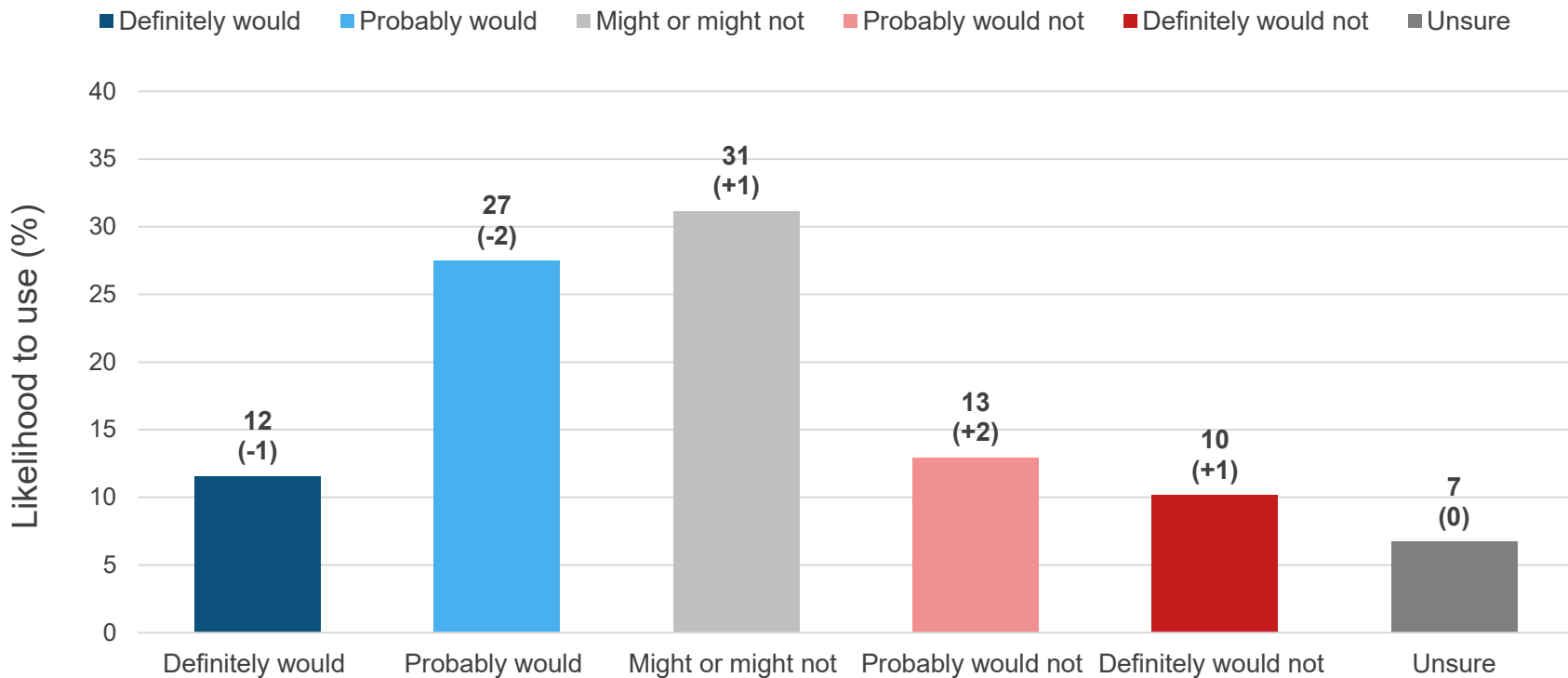


Q: If there was such a campaign asking that people reduce their energy use during a very hot period, would you be willing to reduce your energy use as much as you could for any of the reasons below?

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

Base size: All households (min. n=2,200)

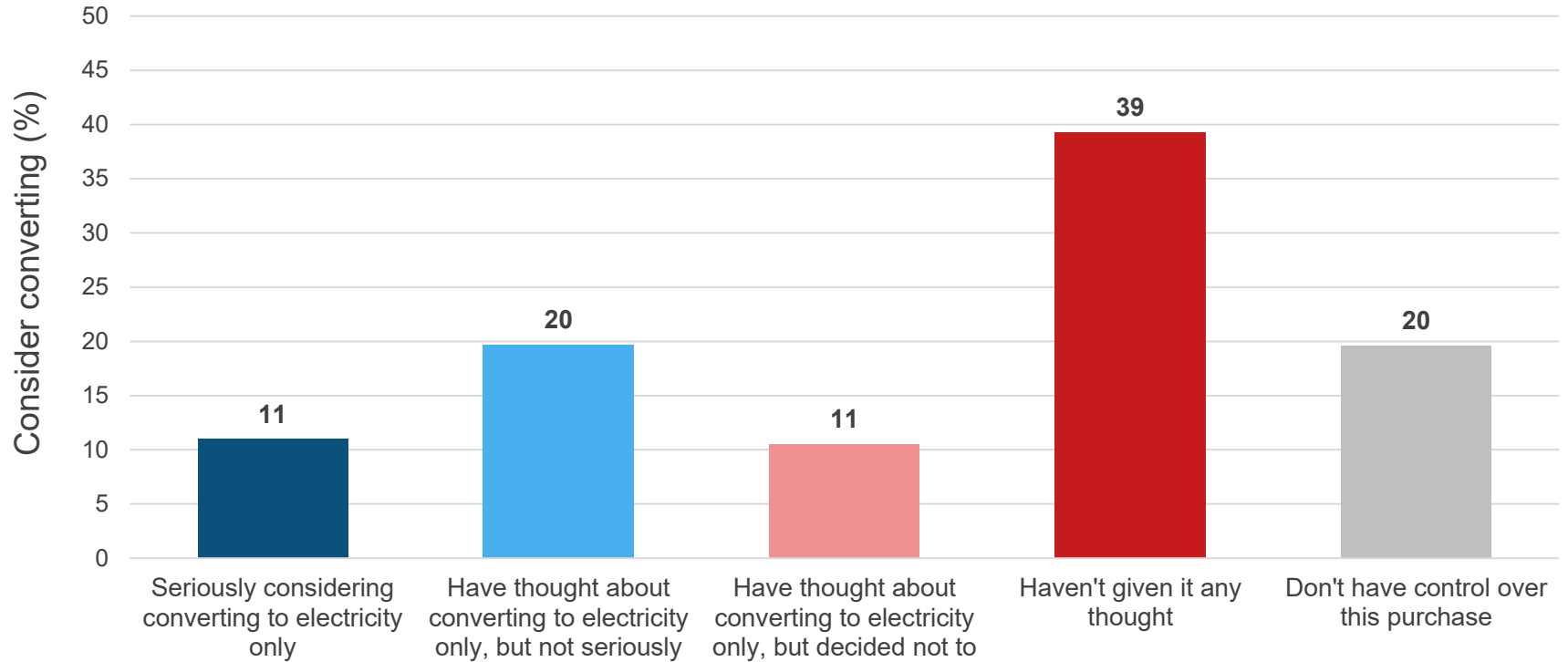
Likelihood to use smart appliances



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

Base size: All households (min. n=2,200)

Removing mains gas supply



Q: Some Australian households have recently been cancelling their gas supply and converting their home to running on electricity only. Which of the following best describes you?

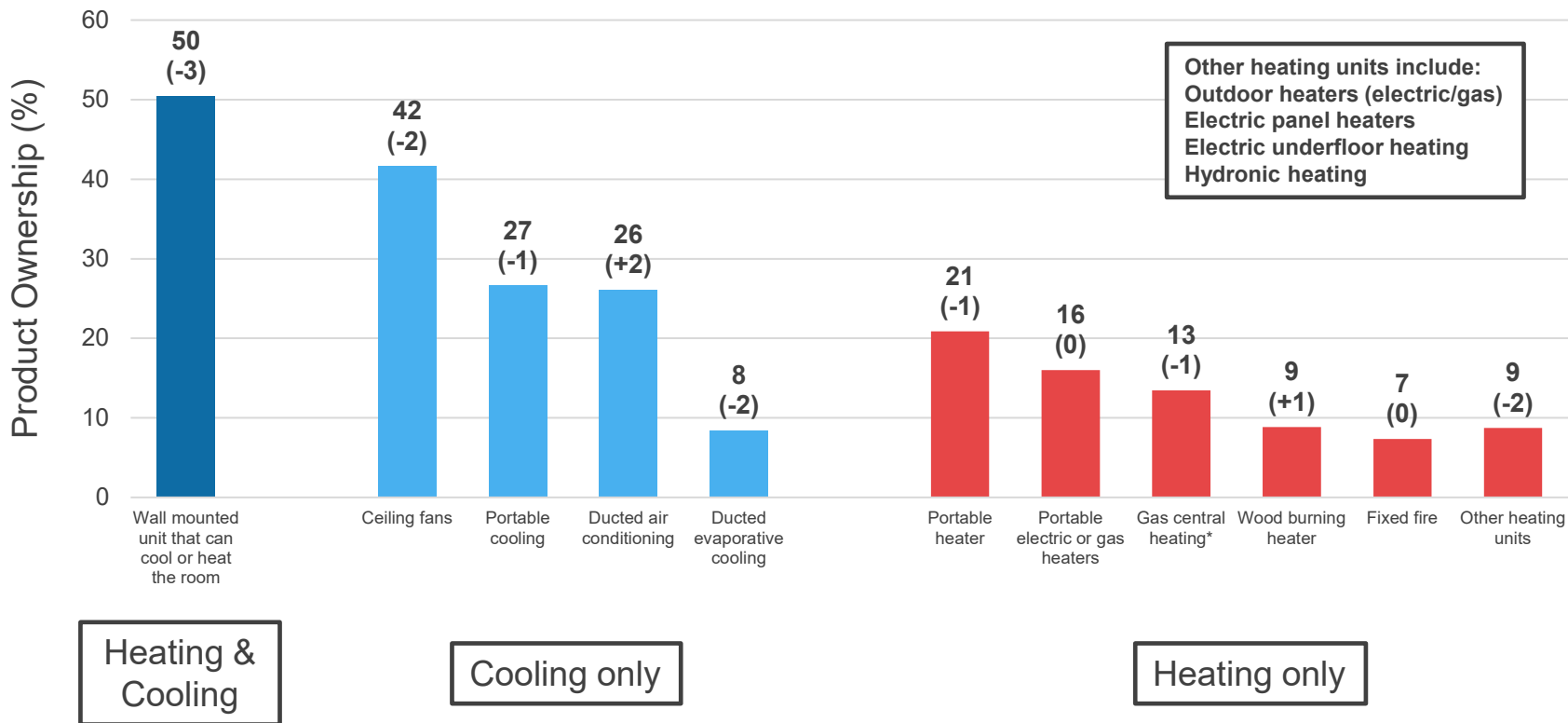
Base size: All households with mains gas (n=1,120)

Ownership

- Half of all households (50%) use wall-mounted air conditioning units for heating and/or cooling.
- Ceiling fans are the most common appliance for cooling households (used in 42% of households), while portable heaters are used most by households for heating (21%).
- In households with mains gas, the majority use gas cooking tops/hot plates (78%), but electricity is used by most for ovens and grills (70% and 52%).
- 35% of households say they have solar panels (33% in 2022) and 7% have battery storage (9% in 2022). Uptake of electric cars is at 4% (2% in 2022).
- 40% of households say they own a smart meter, with 19% using it to help control energy costs.



Products Owned: Heating & Cooling

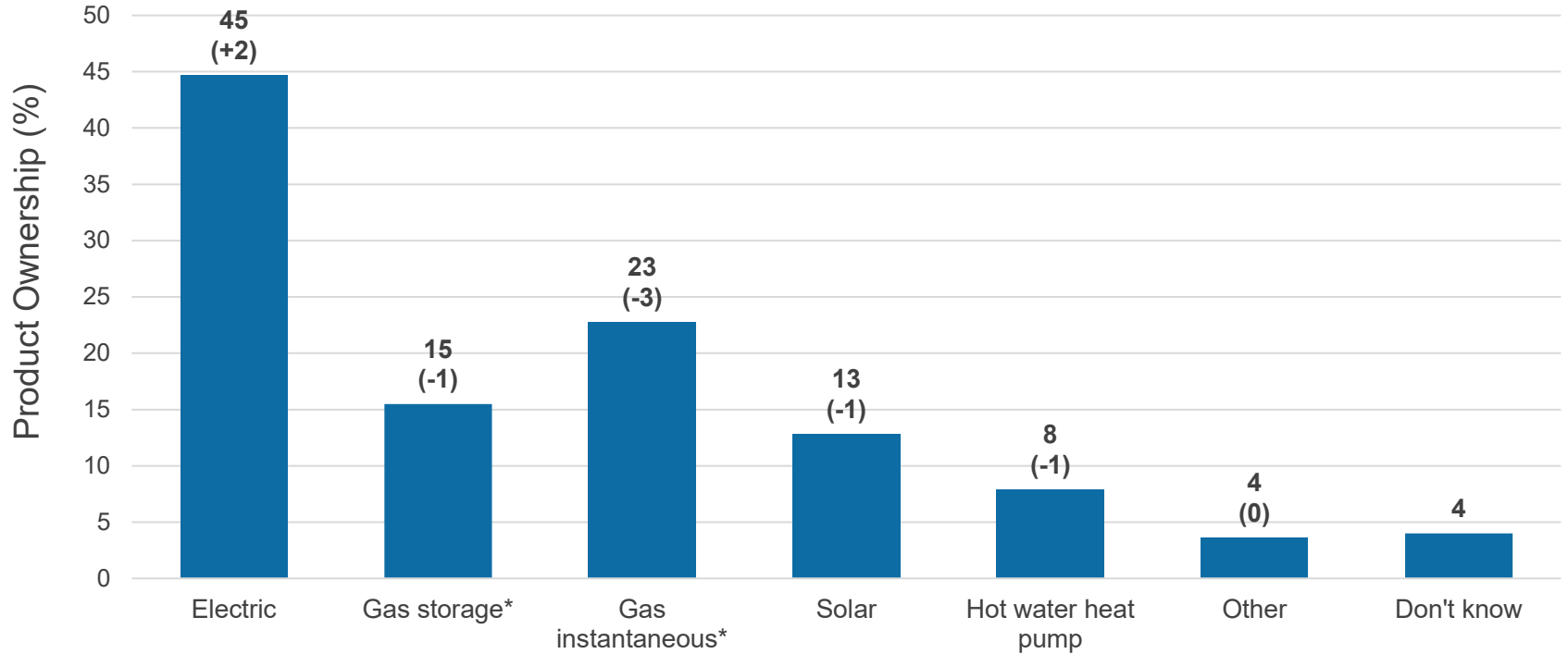


Q: Which of the following do you have for managing the temperature at your property? MULTIPLE CHOICE

Base size: All households (min. n=2,200)

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

Products Owned: Hot Water Systems

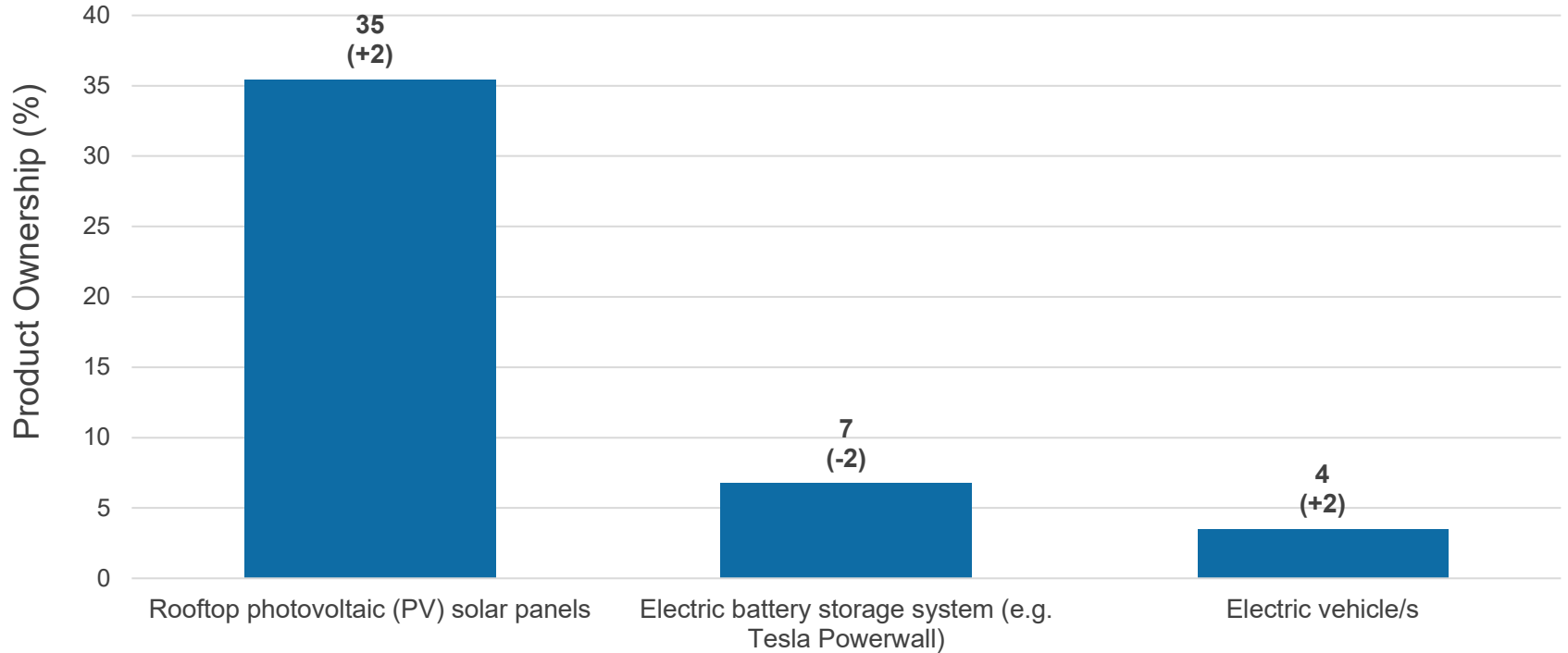


Q: Which hot water systems do you use at your property? MULTIPLE CHOICE

Base size: All households (min. n=2,200)

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

Products Owned: Electricity Generation and Storage

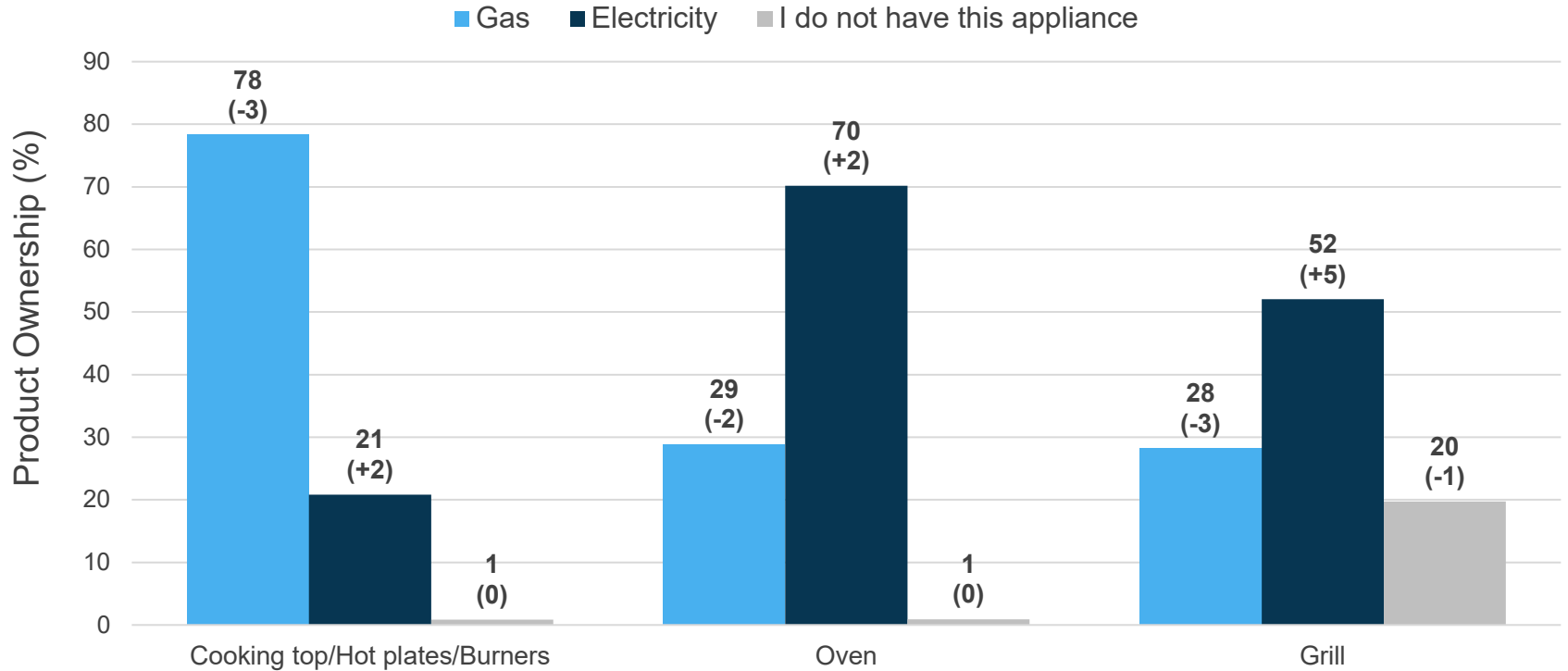


Q: Which of the following electricity generation and storage appliances do you have at your property? MULTIPLE CHOICE

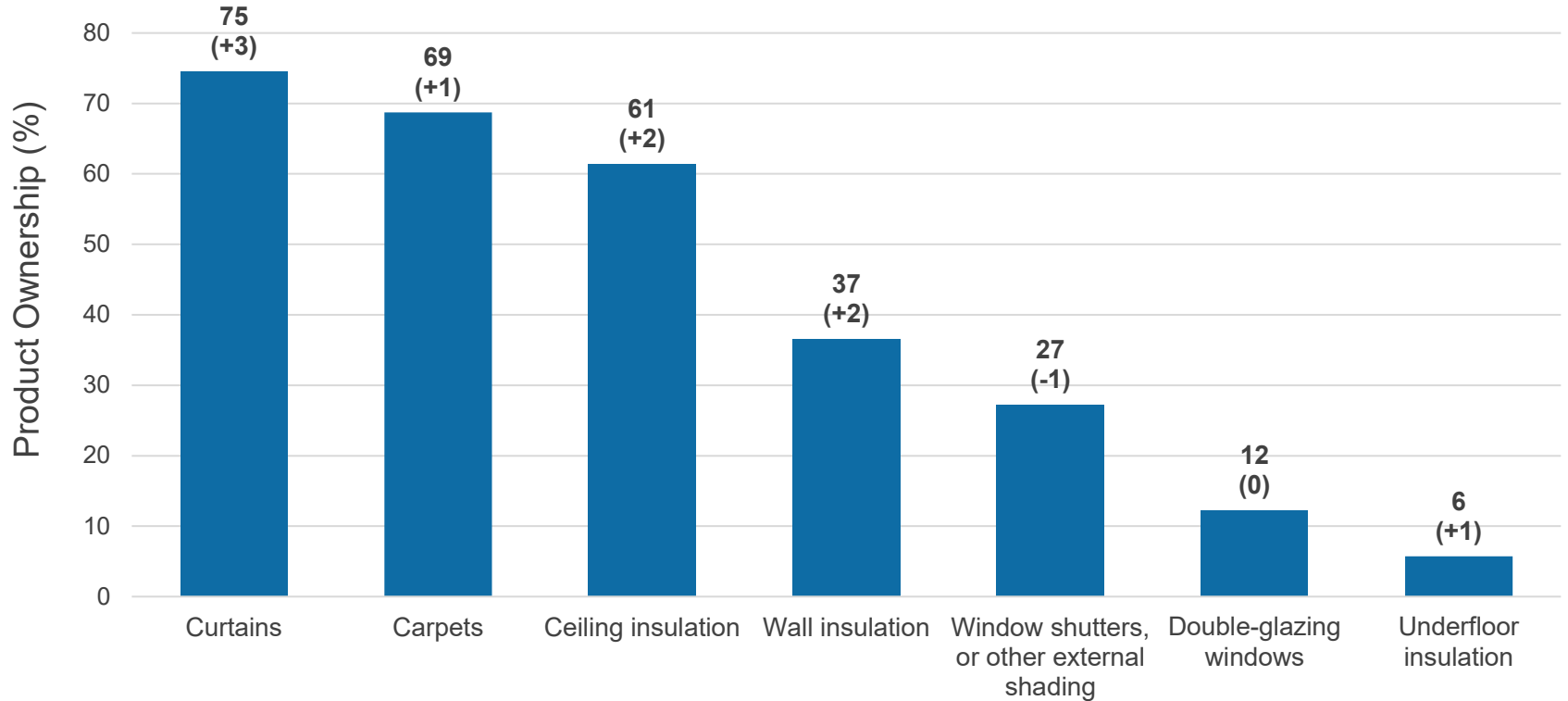
Q: Which of the following electrical appliances do you have at your property? MULTIPLE CHOICE

Base size: All households (min. n=2,200)

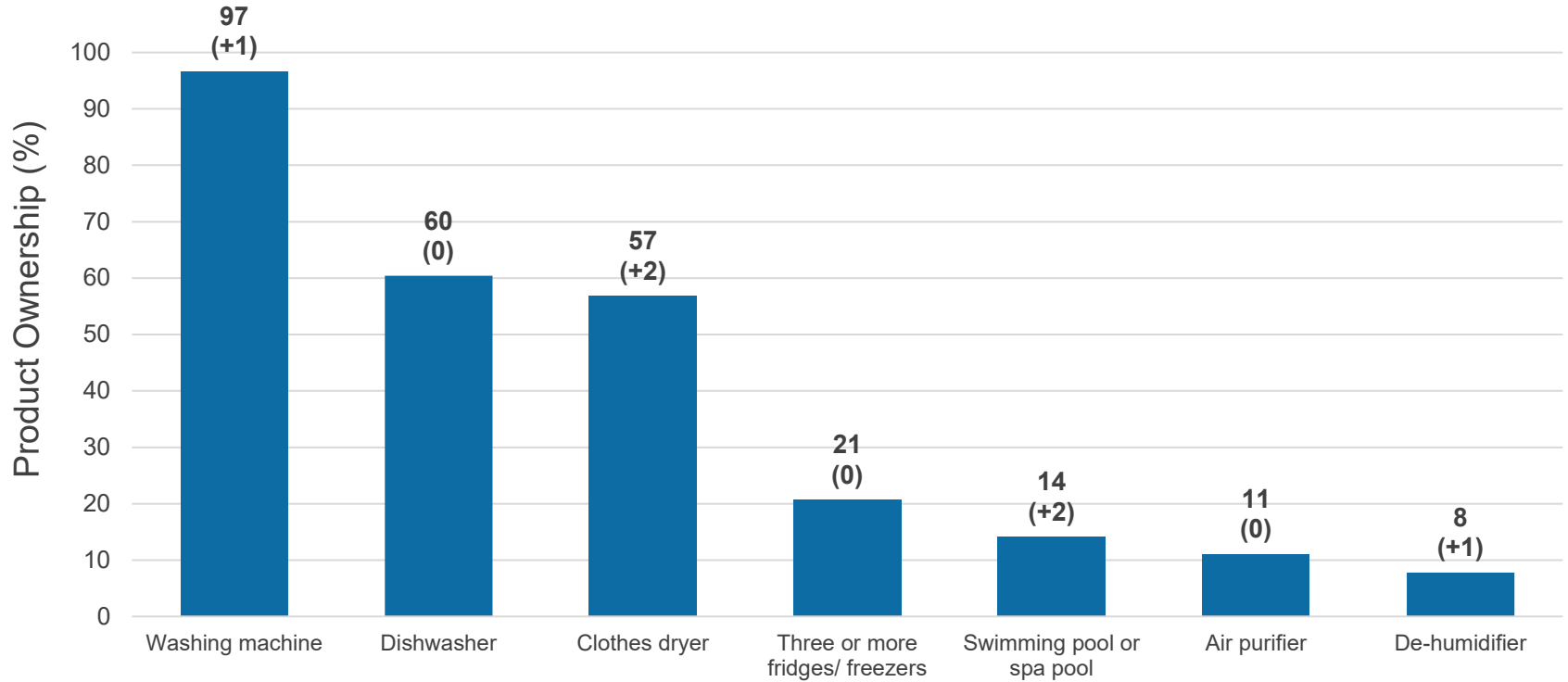
Products Owned: Cooking



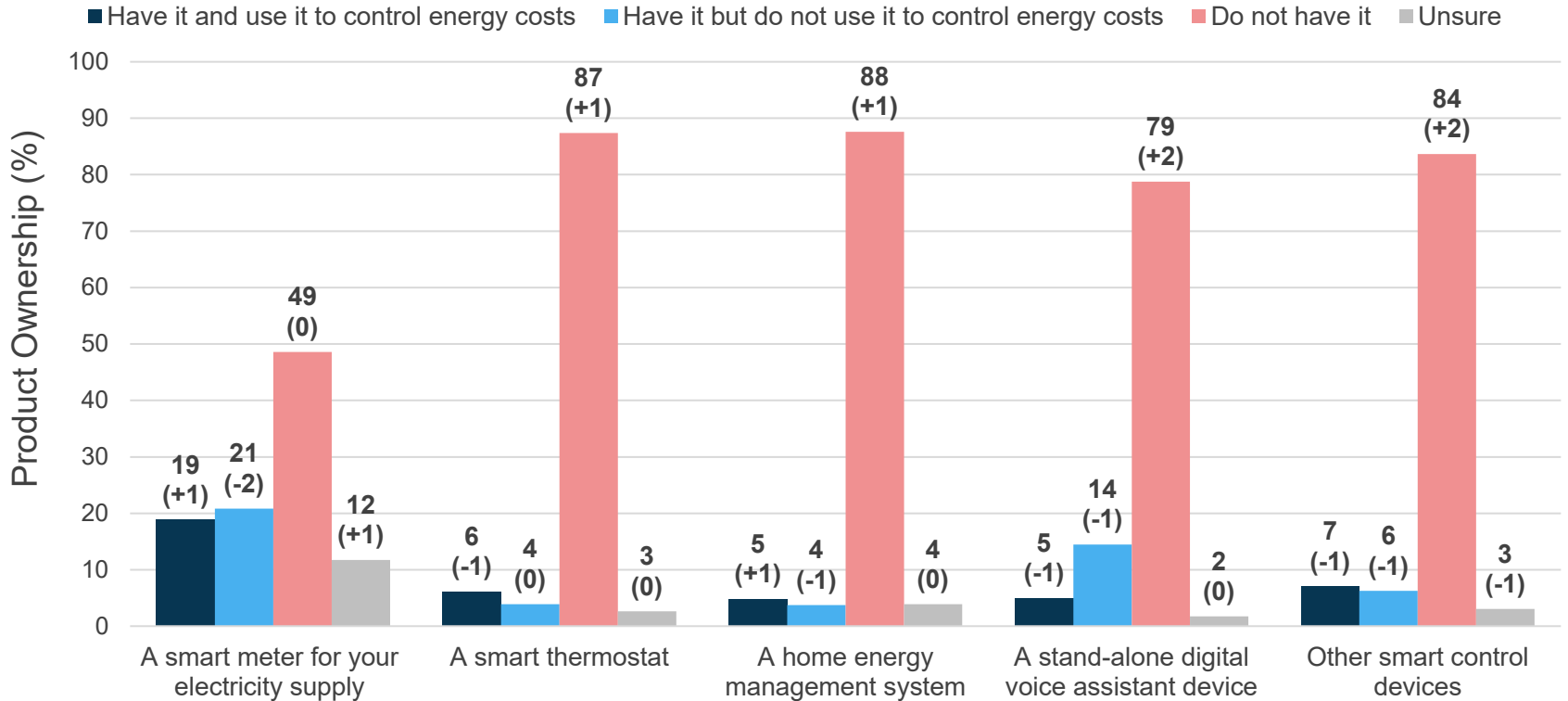
Products Owned: Insulation



Products Owned: Appliances



Products Owned: Smart Devices

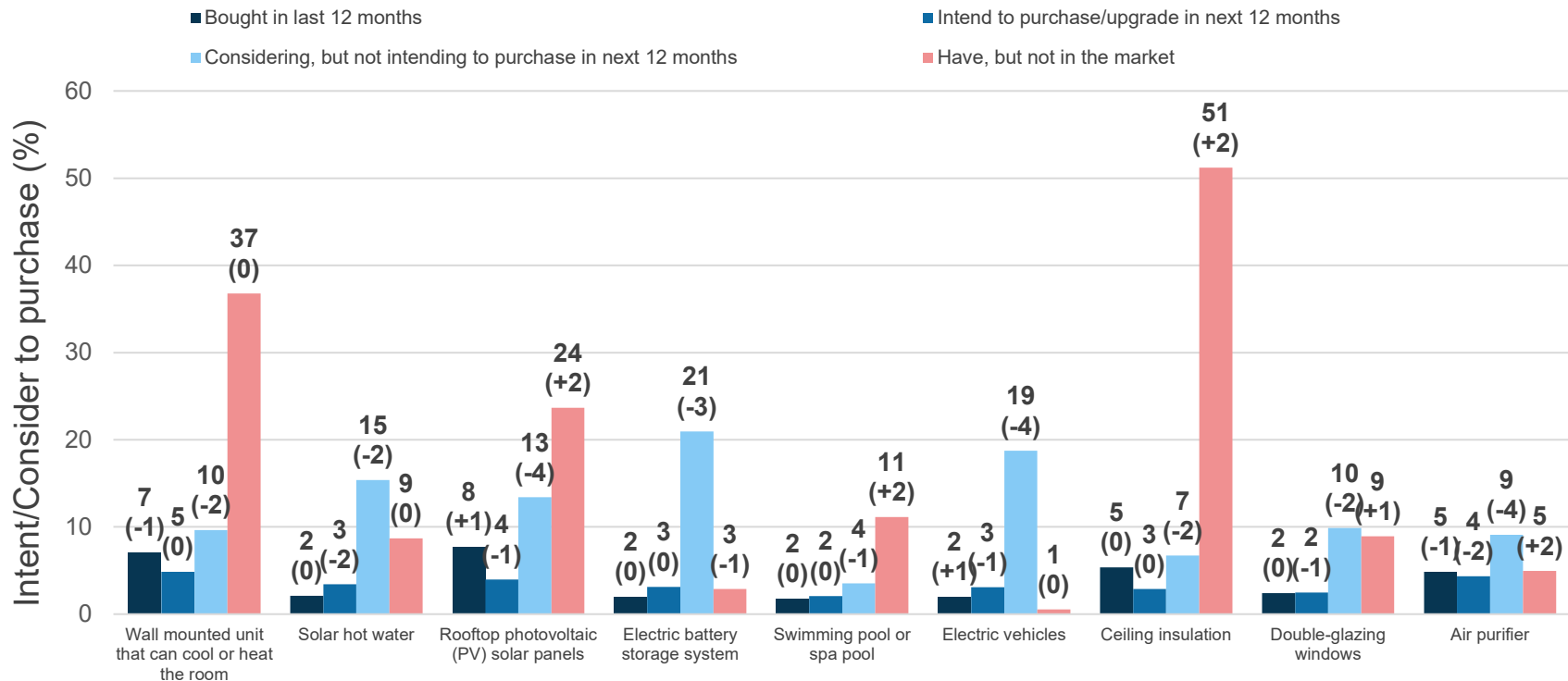


Upgrade & Intention to purchase

- Air conditioning units, solar panels and air purifiers are products most likely to be bought in the next 12 months (5%, 4% and 4% of households are expecting to make this purchase respectively).
- Less households are considering purchasing battery storage, electric vehicles and solar panels in the future, with 21% of households considering battery storage (24% in 2022), 19% considering electric vehicles (23% in 2022) and 13% considering solar panels (17% in 2022).
- 8% of households have upgraded their hot water system in the last 12 month and a further 5% intend to do so in the next year.



Upgrade & Intention to purchase: Heating and efficiency appliances



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

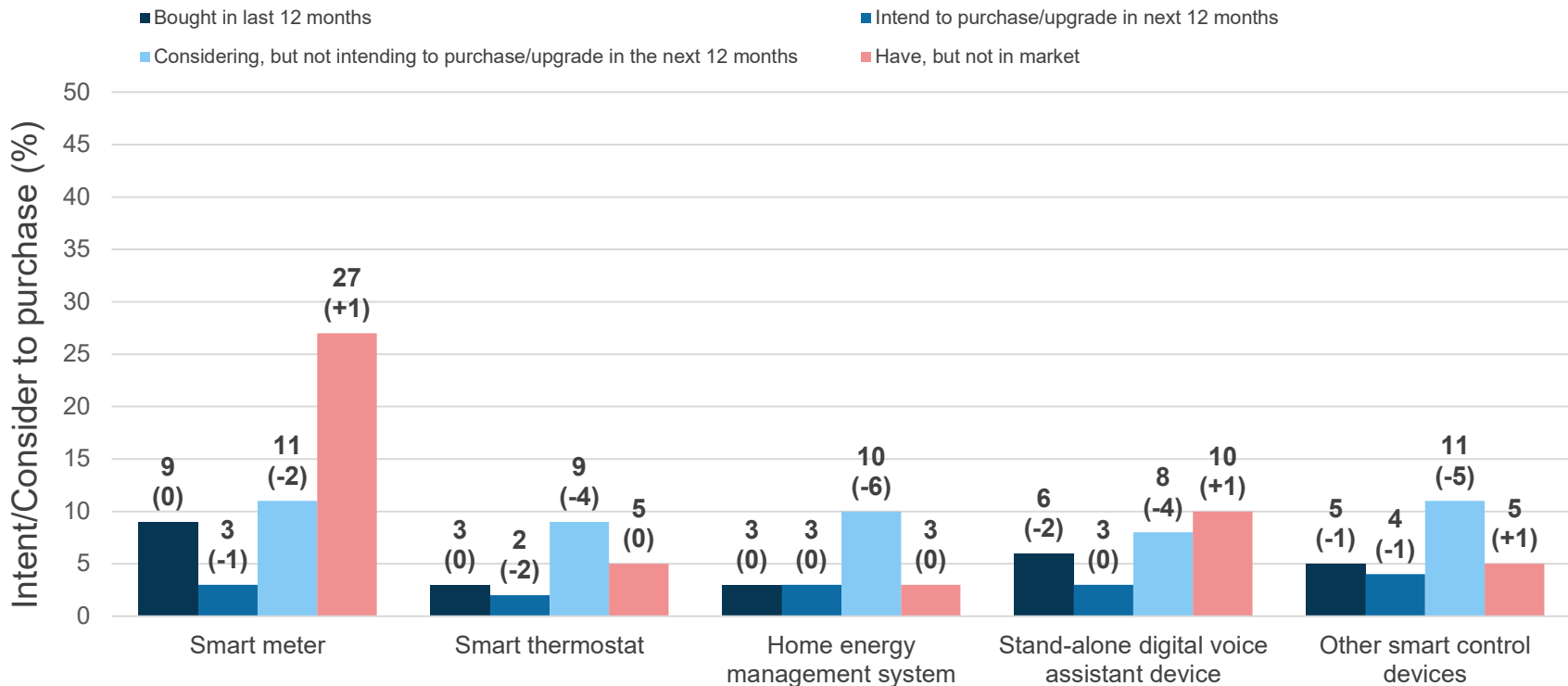
Q: Which of the following are you intending to replace or upgrade in your property?

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

Base size: All households (min. n=2,200)

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

Upgrade & Intention to purchase: Smart Devices



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

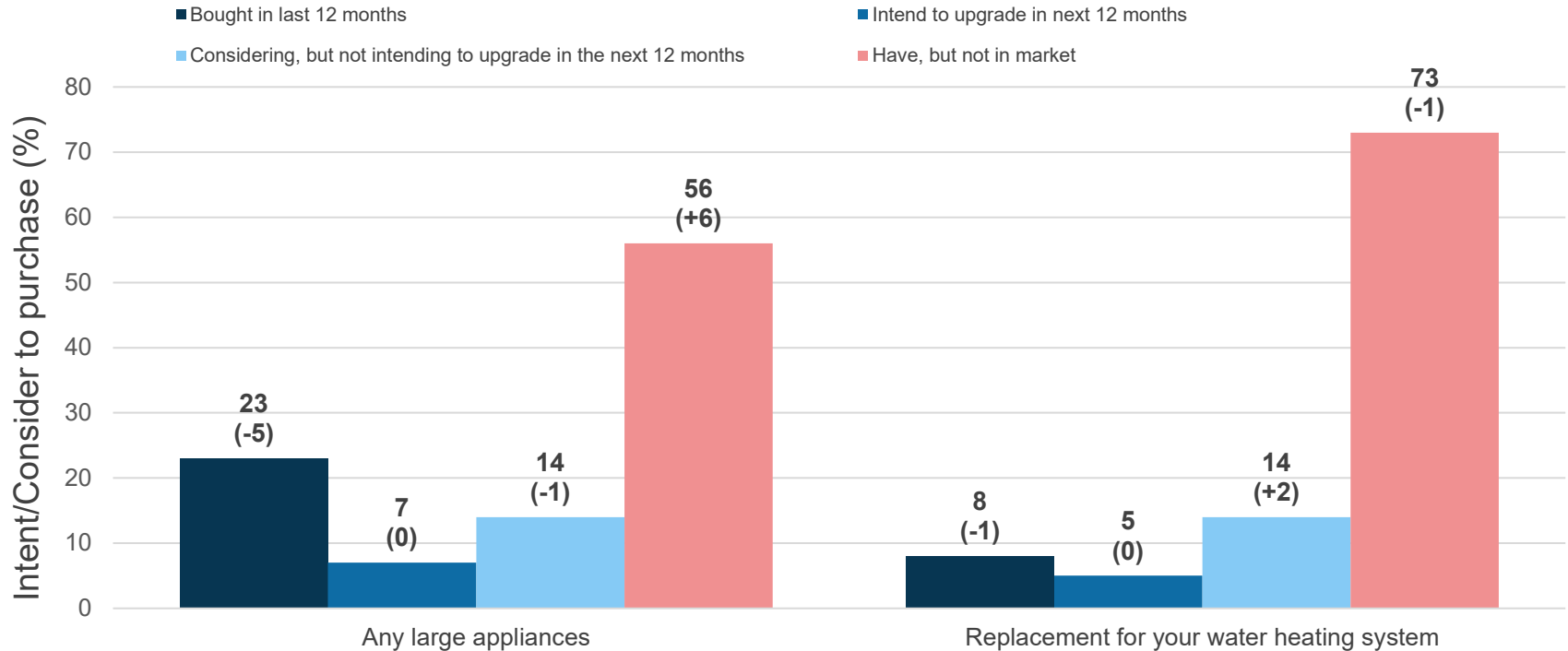
Q: Which of the following are you intending to replace or upgrade in your property?

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

Base size: All households (min. n=2,200)

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

Upgrade & Intention to purchase: Replacements



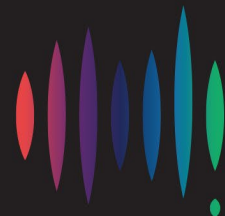
Q: Did you purchase or have this appliance or system installed in the last 12 months?

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

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

Base size: All households (min. n=2,200)

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



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