

ENERGY CONSUMER BEHAVIOUR SURVEY

Household Topline Results
October 2022

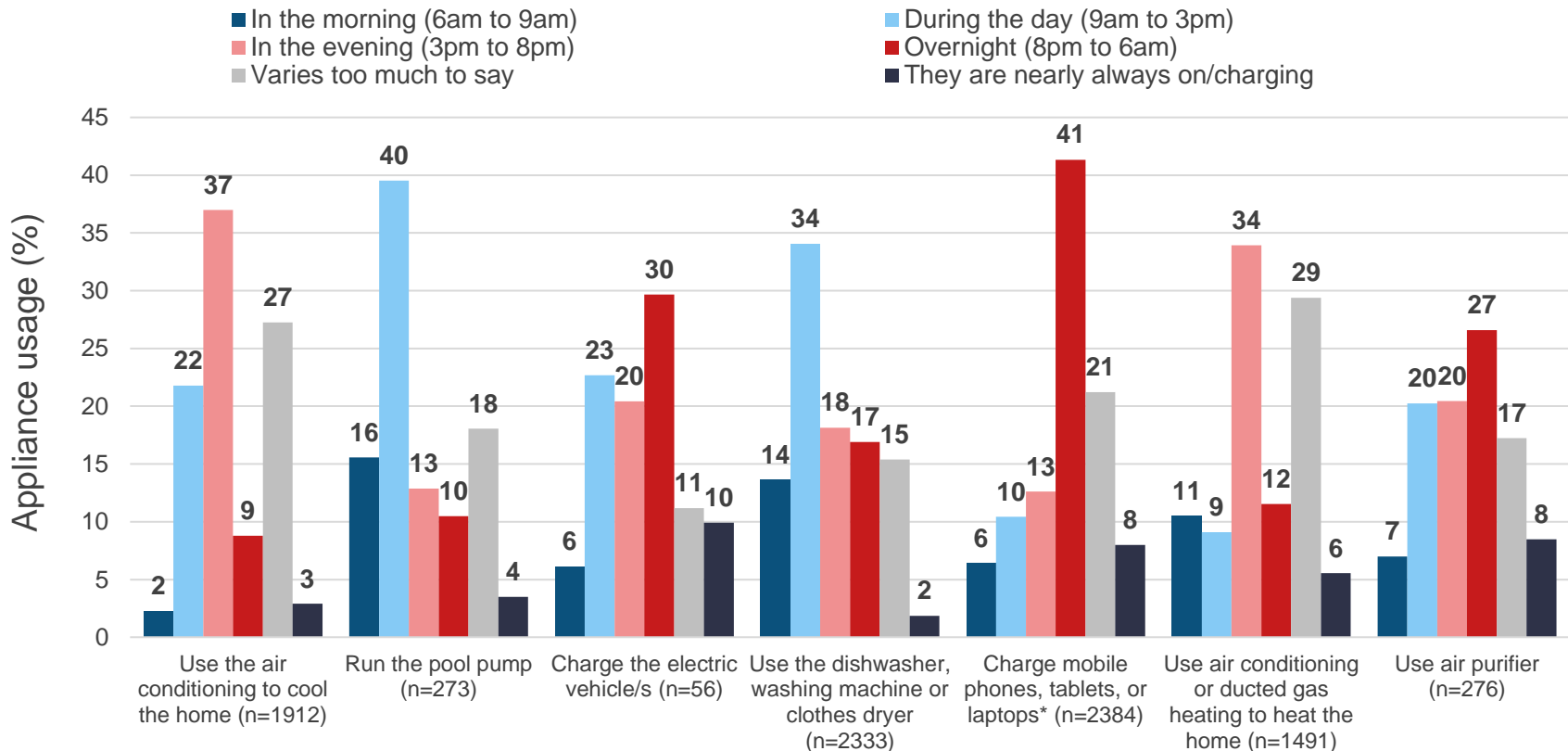


Changing Behaviour

- Households typically use energy during the day to run pool pumps (40% of households with appliance) and use washing machines/dishwashers (34%). Air conditioning (for heating and cooling) is mostly turned on in the evening (37% and 34% respectively), and electrical appliances and EVs are charged overnight (41% and 30% respectively).
- 28% of households who charge appliances during peak times say it would be very easy to switch to off-peak and 22% of those using dishwashers or washing machines say it would be very easy to switch usage times. The most difficult usage changes would be for air conditioning (57% say this would be quite or very difficult to switch when cooling and 60% for heating purposes).
- Just 13% of households say they would definitely use smart devices to control energy use in the future. 29% say they probably would and 30% are on the fence. This behaviour is unchanged from last year.



Electrical appliance use



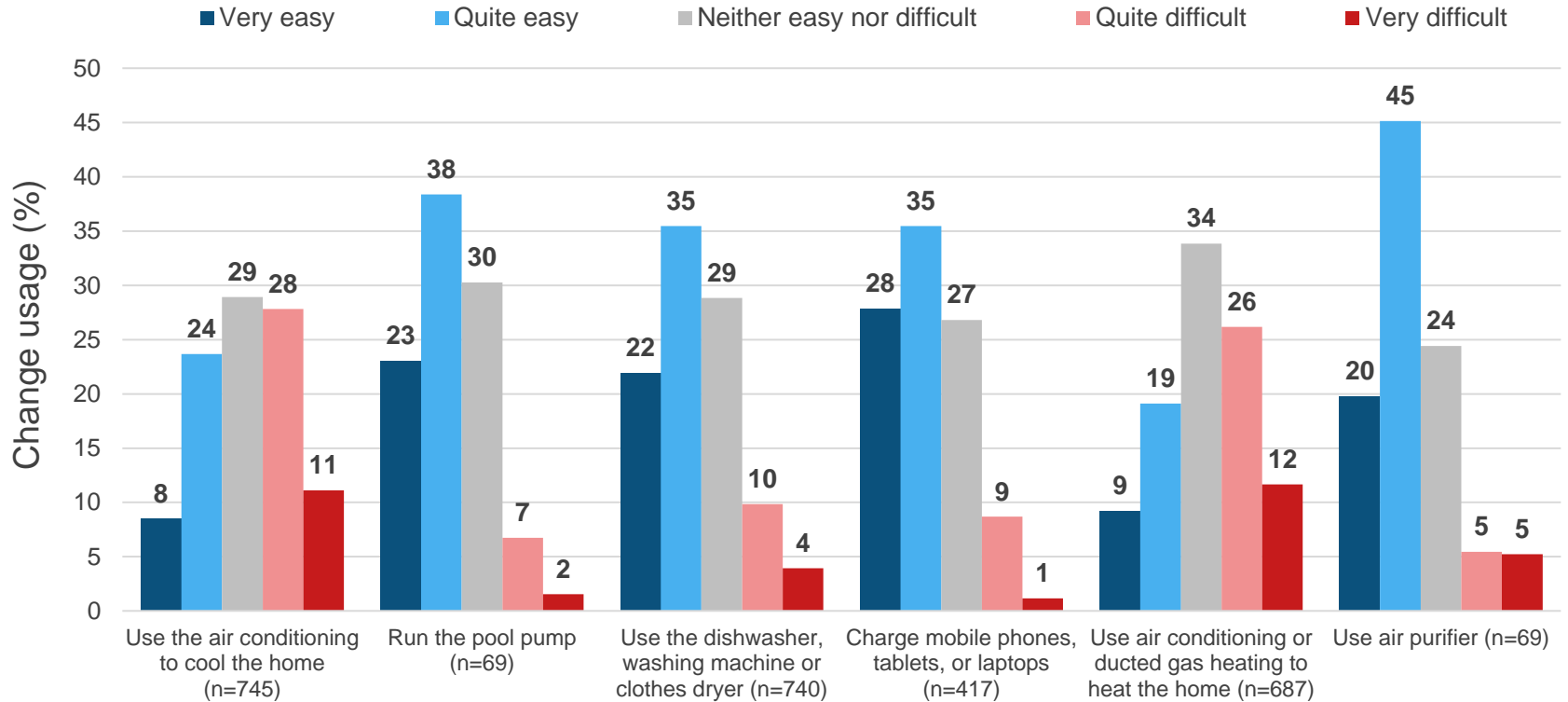
Q: Typically, at what time of the day does your household use the following appliances?

Base size: All households who have each appliance

Results suppressed for any product with sample size <50

* Asked to all participants

Difficulty to change electrical appliance use

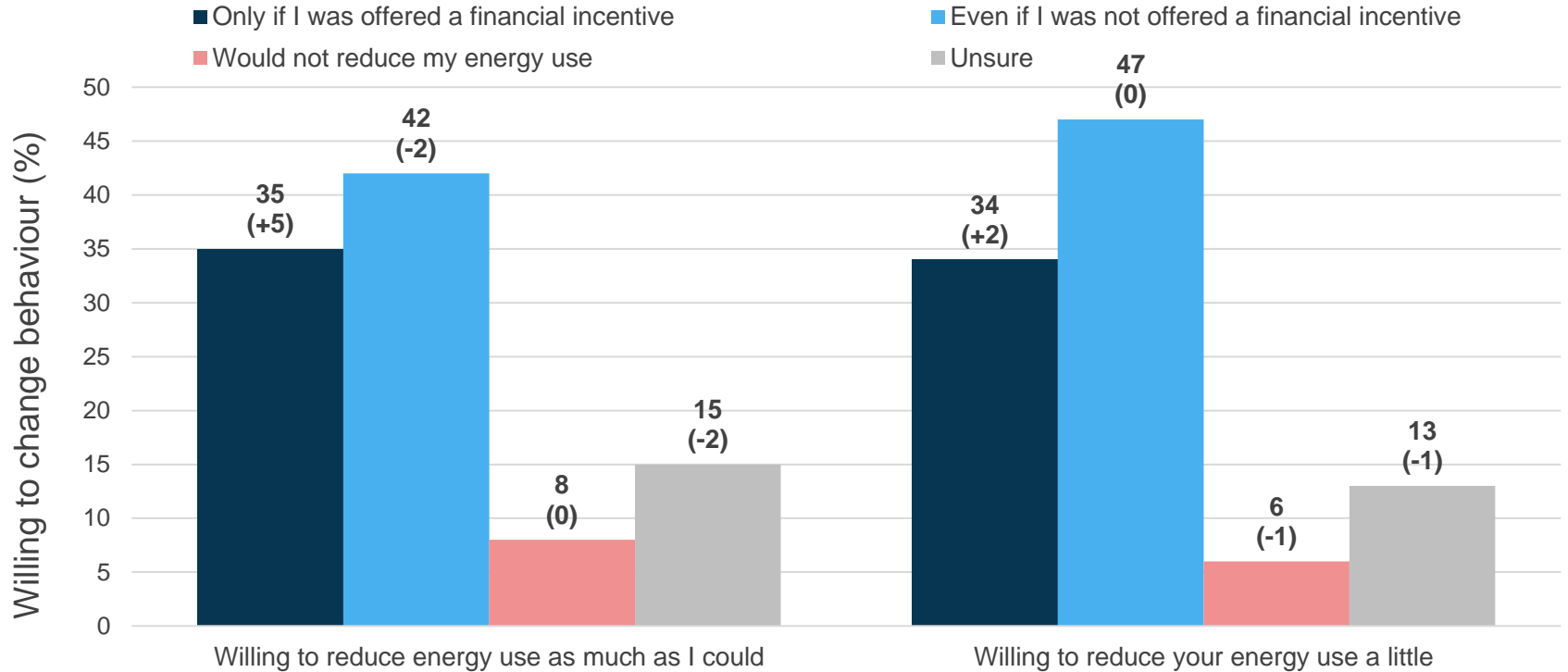


Q: How easy or difficult would it be for your household to change when you do these things to a time when there is less demand for energy (e.g. to the middle of the day or overnight)?

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

Results suppressed for any product with sample size <50

Willingness to change behaviour

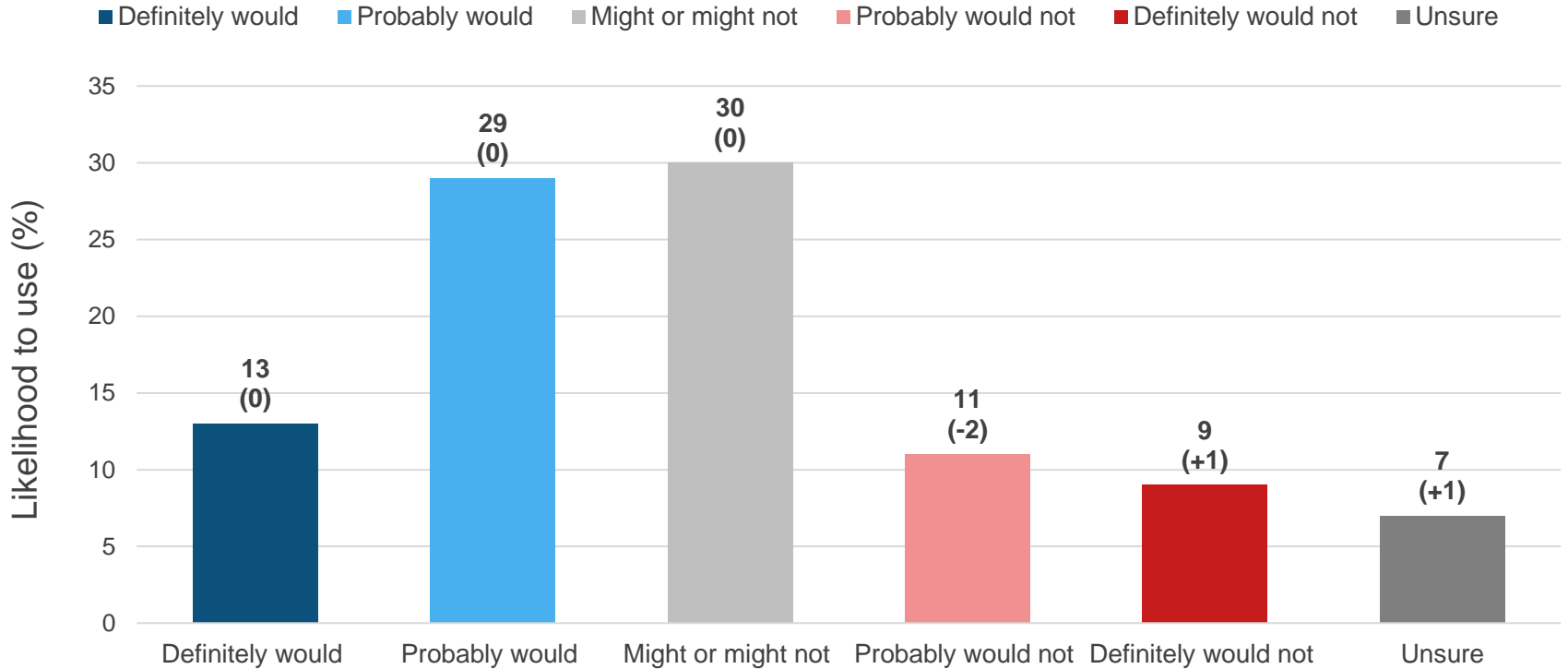


Q: If there was such a campaign asking that people reduce their energy use during a very hot period, would you be willing to reduce your energy use as much as you could for any of the reasons below?

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

Base size: All households (n=2,384)

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?**

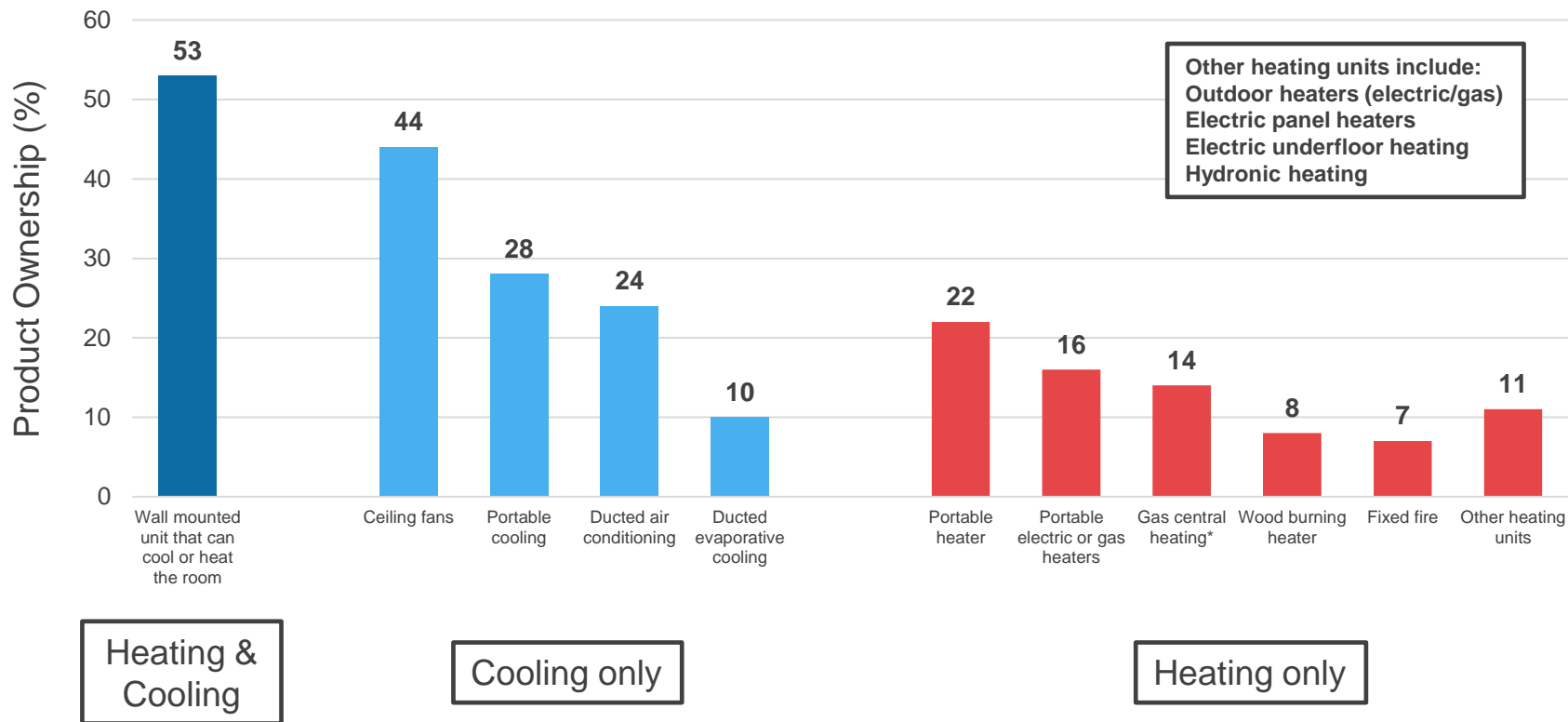
Base size: All households (n=2,277)

Ownership

- Half of all households use wall-mounted conditioning units for heating and/or cooling.
- Ceiling fans are the most common appliance for cooling households (used in 44% of households), while portable heaters are used most by households for heating (22%).
- In households with mains gas, the majority use gas cooking tops/hot plates (81%), but electricity is used by most for ovens and grills (68% and 47%).
- 33% of households say they have solar panels (31% in 2021) and 9% have battery storage at their property (no change from 2021). Uptake of electric cars is at 2%.



Products Owned: Heating & Cooling

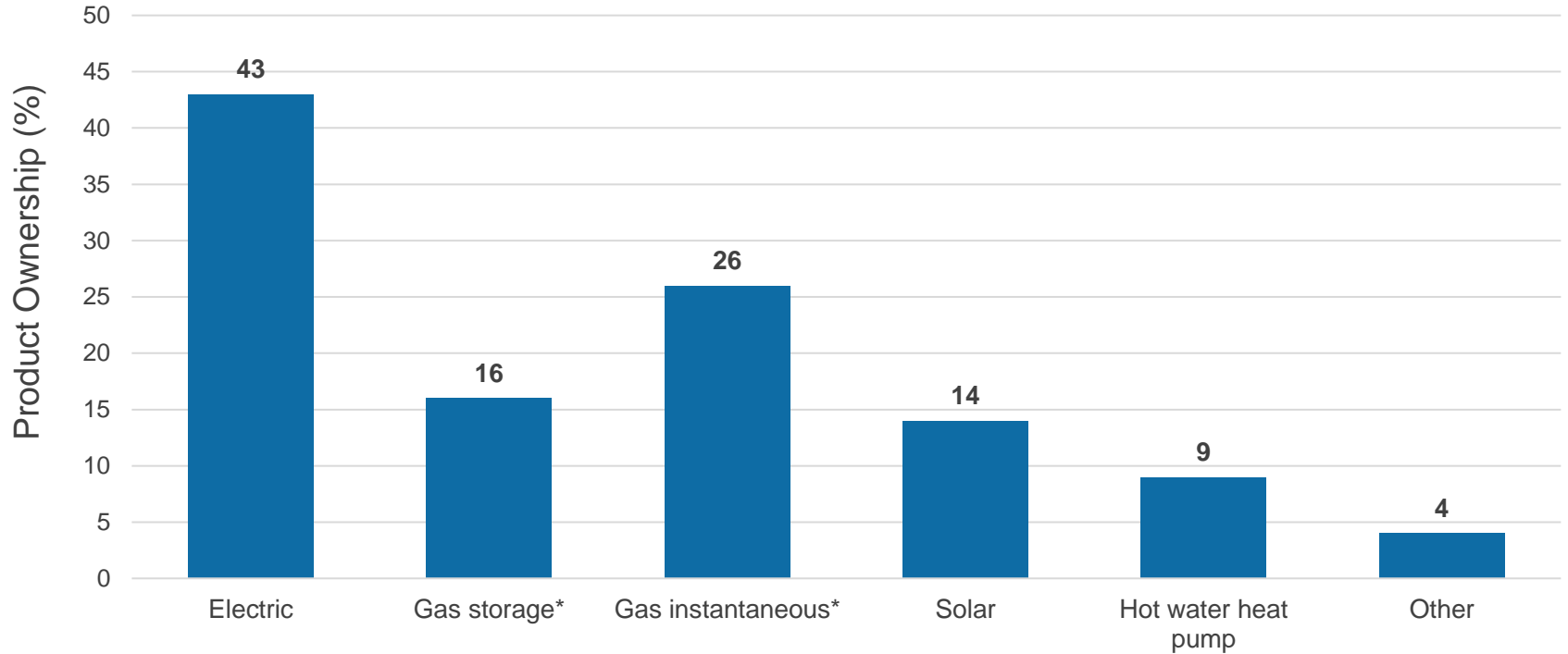


Q: Which of the following do you have for managing the temperature at your property? MULTIPLE CHOICE

Base size: All households (n=2,384)

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

Products Owned: Hot Water Systems

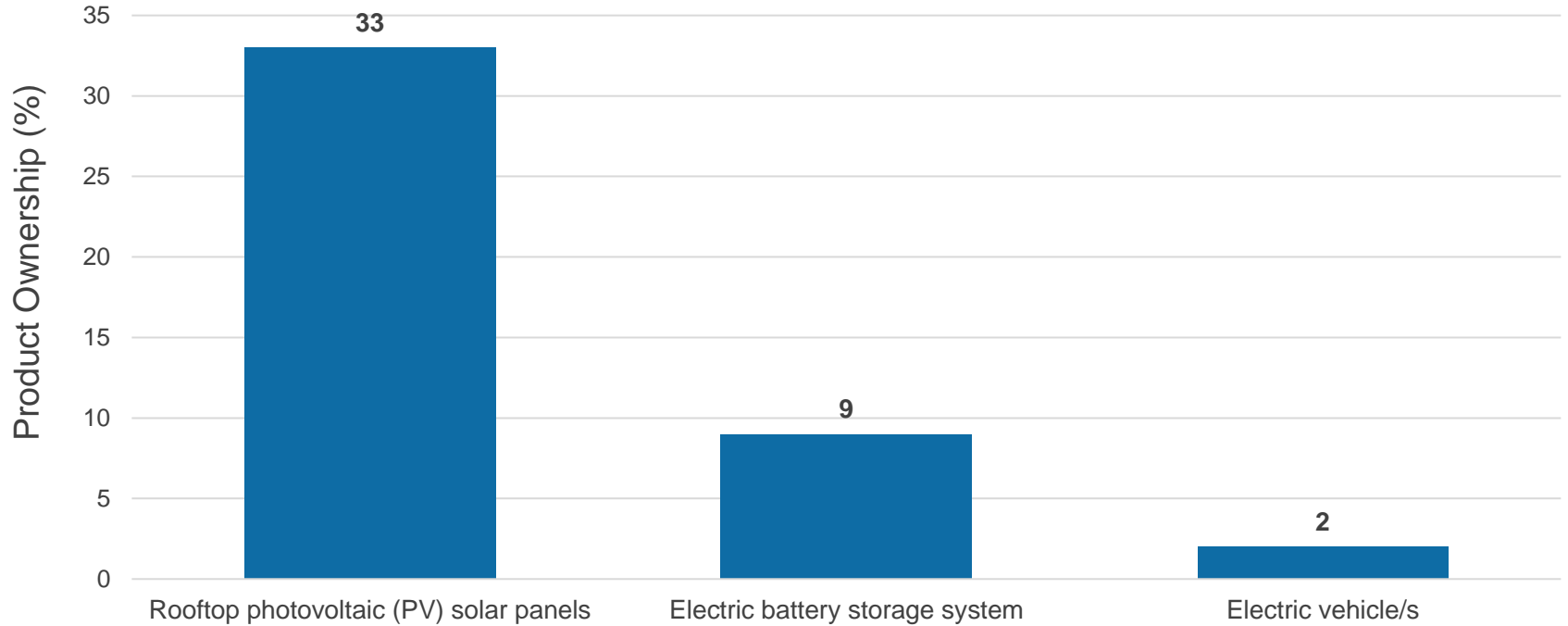


Q: Which hot water systems do you use at your property? MULTIPLE CHOICE

Base size: All households (n=2,384)

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

Products Owned: Electricity Generation and Storage

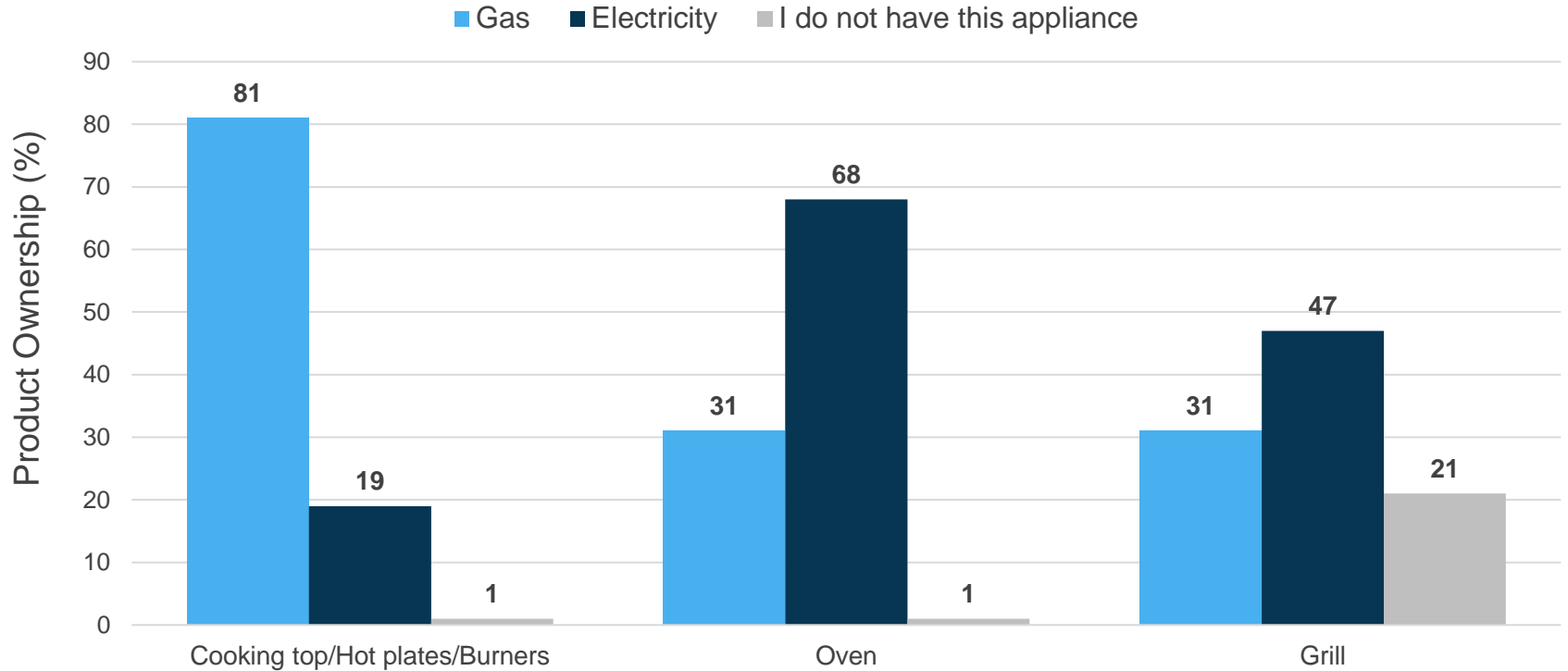


Q: Which of the following electricity generation and storage appliances do you have at your property? MULTIPLE CHOICE

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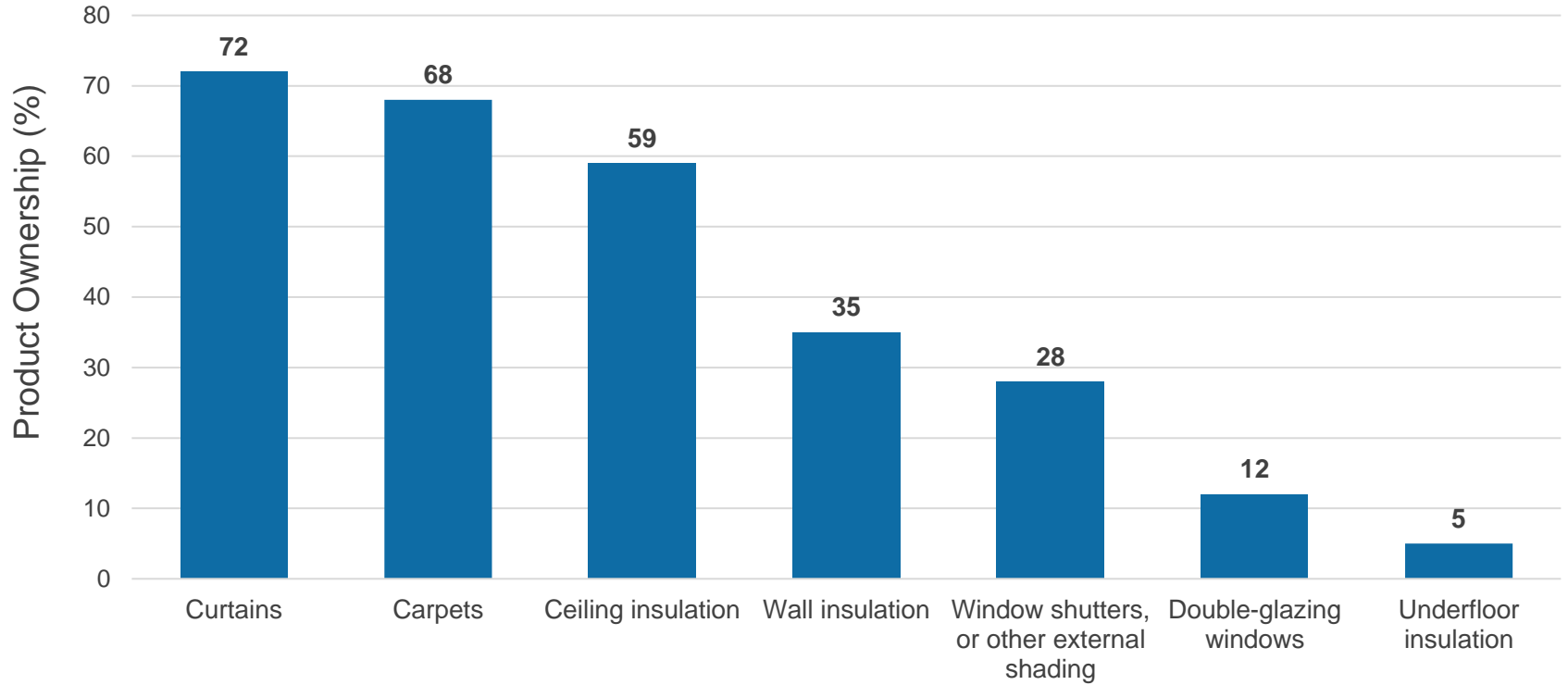
Base size: All households (n=2,277)

Products Owned: Cooking



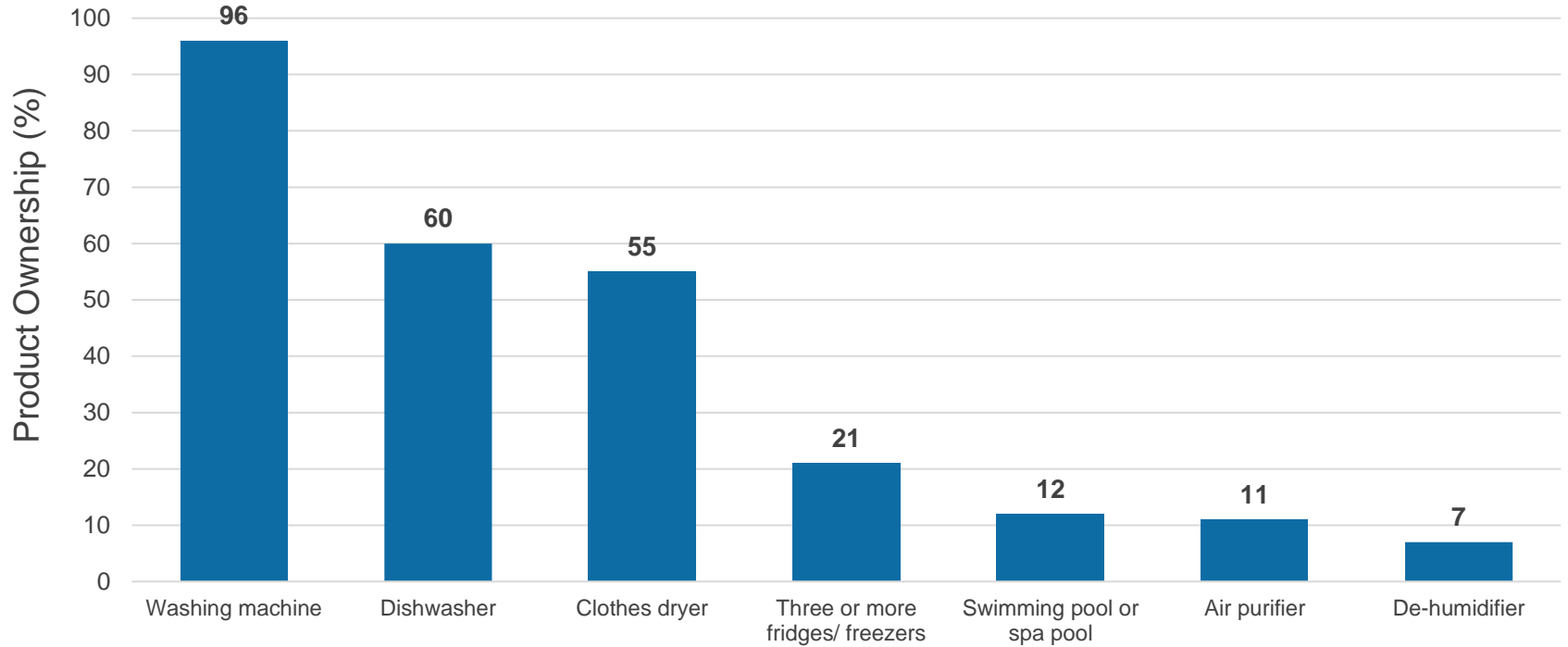
Q: Which energy source do the following cooking appliances use at your property?
 Base size: All households with mains gas (n=1,292)

Products Owned: Insulation



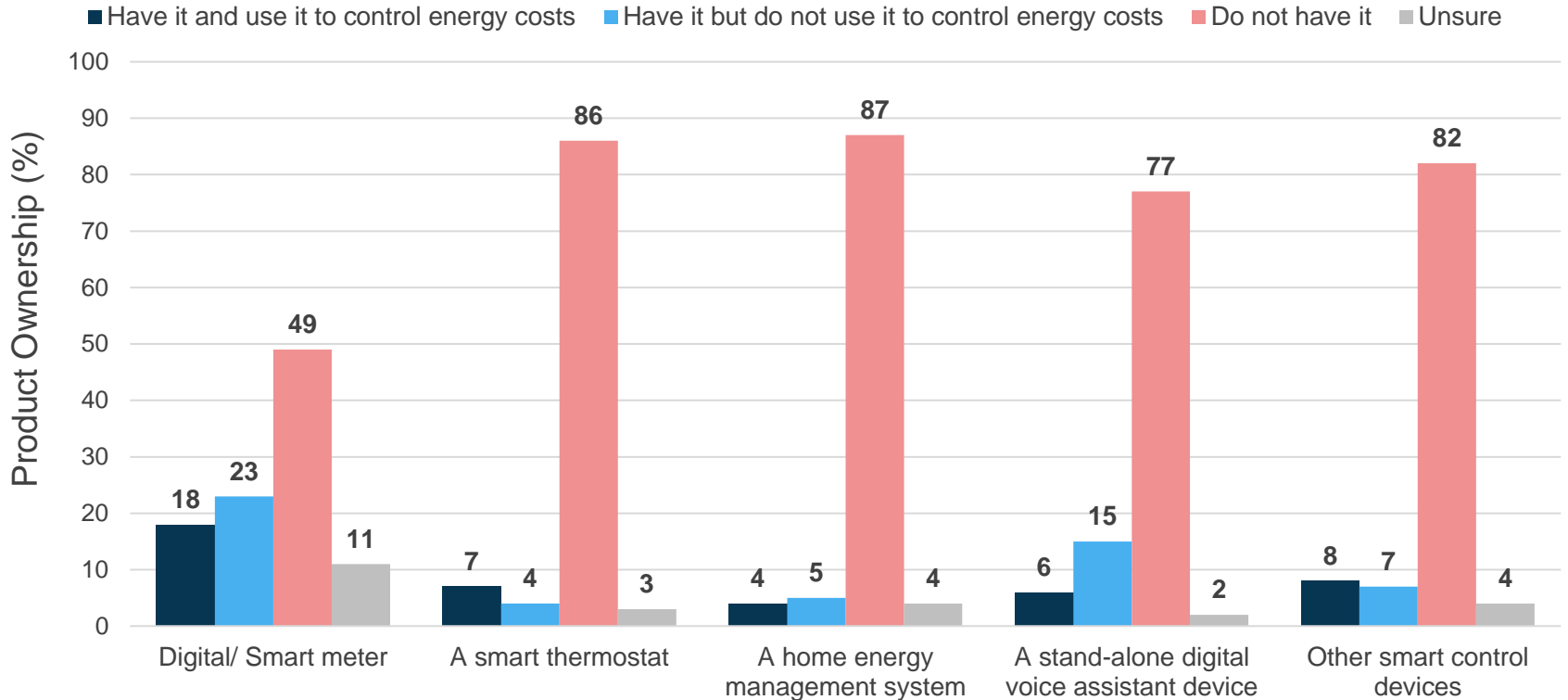
Q: Does your property have any of the following insulation features? MULTIPLE CHOICE
 Base size: All households (n=2,384)

Products Owned: Appliances



Q: Which of the following electrical appliances do you have at your property? MULTIPLE CHOICE
 Base size: All households (n=2,277)

Products Owned: Smart Devices



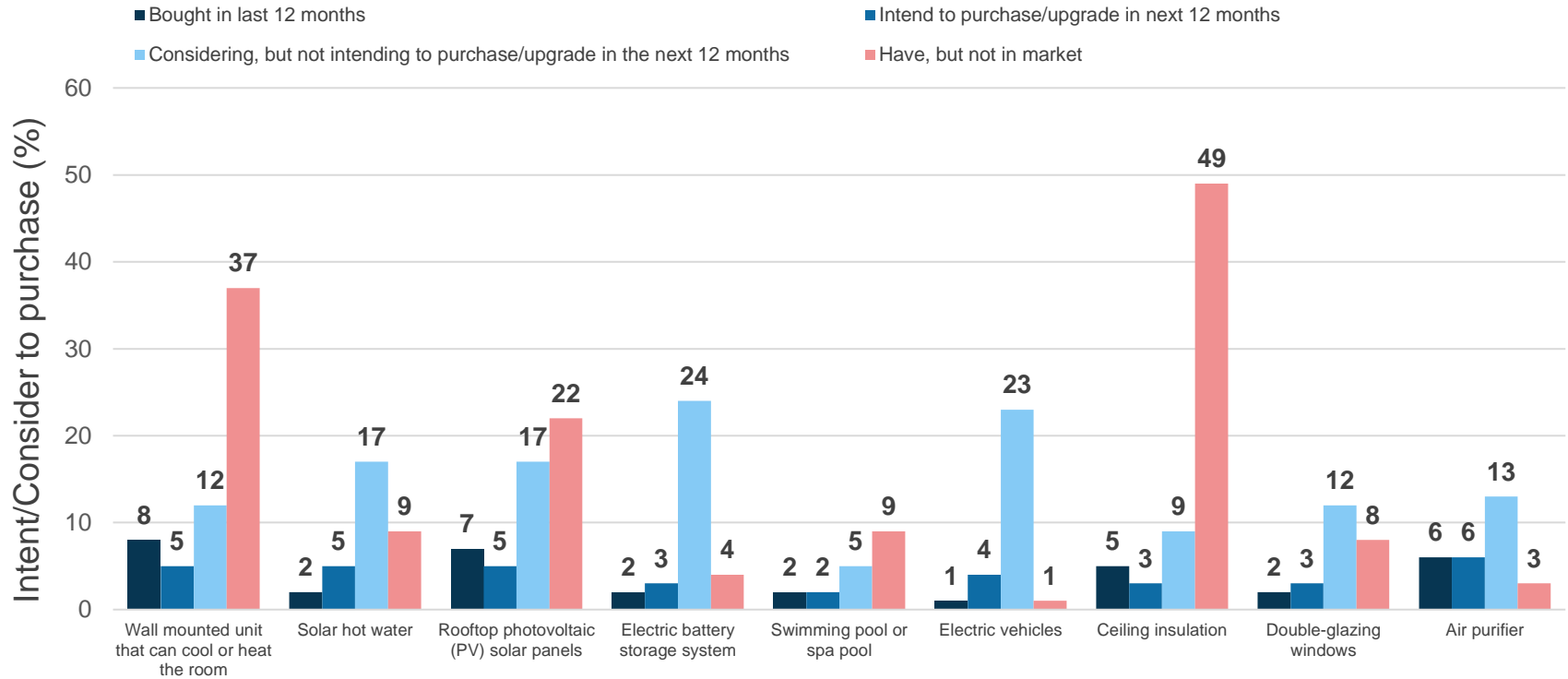
Q: Which of the following technology do you have in your household, and which do you use to help control your energy costs?
 Base size: All households (n=2,384)

Upgrade & Intention to purchase

- Air condition units, solar hot water and solar panels are products most likely to be bought in the next 12 months (5% of households expecting to make purchase).
- Interest in battery storage and electric vehicles is further in the future, with 24% of households considering battery storage in the future and 23% considering electric vehicles.
- 9% 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?

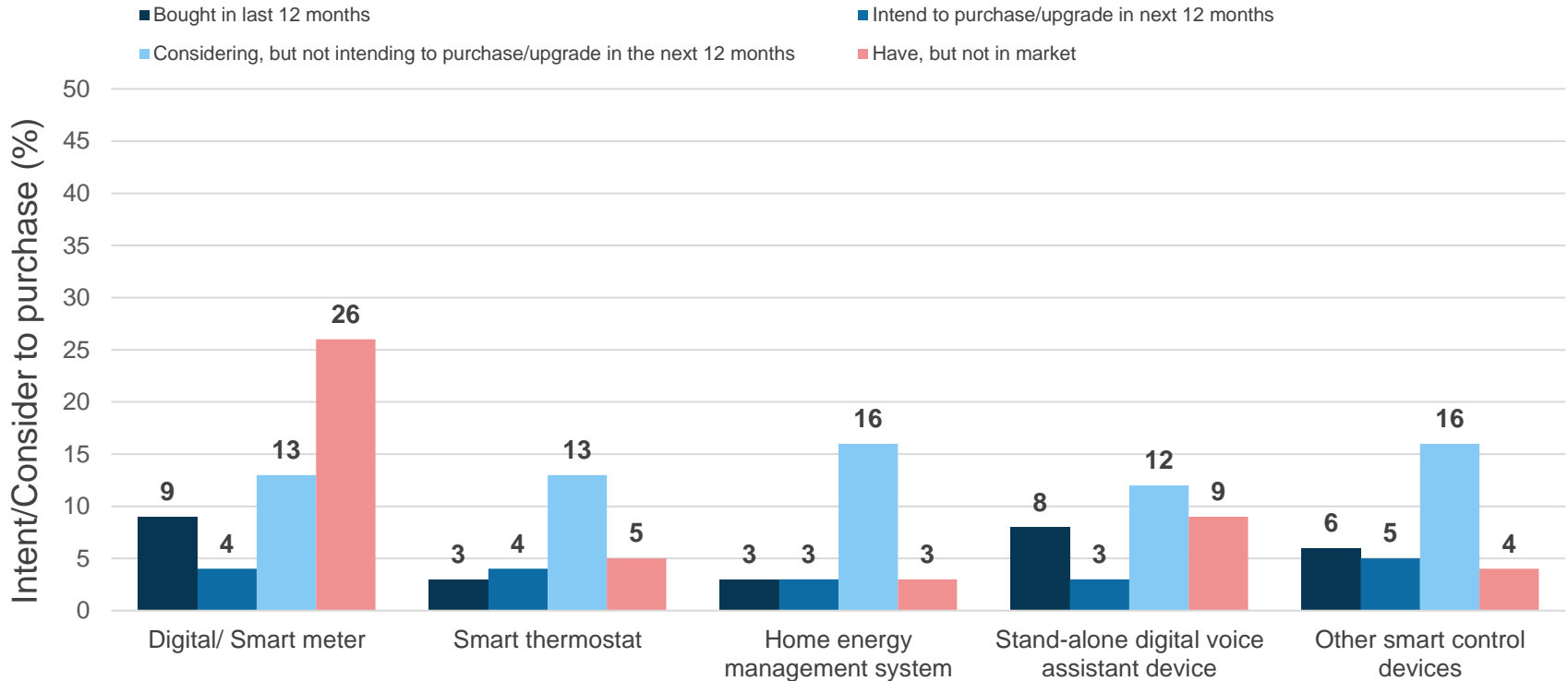
Q: Which of the following are you intending to replace or upgrade in your property?

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

Base size: All households (n=2,384)

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?

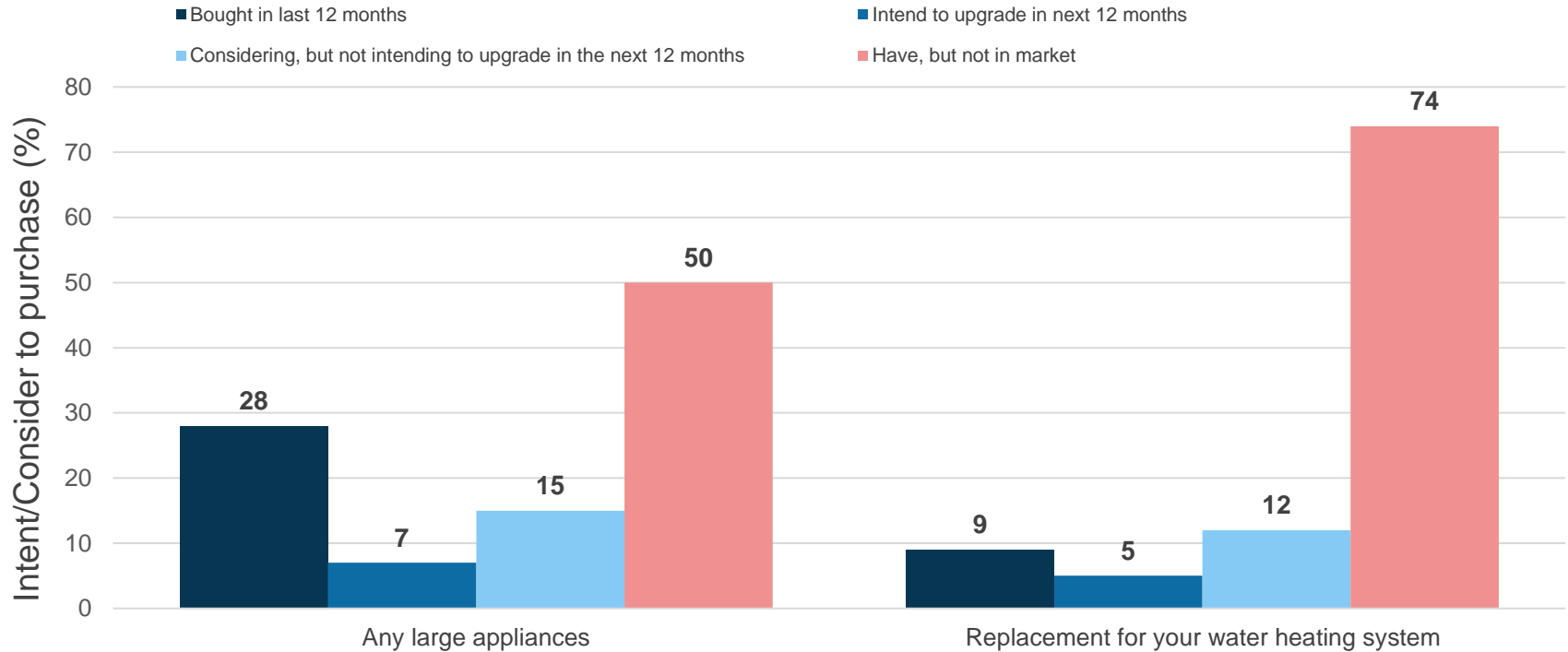
Q: Which of the following are you intending to replace or upgrade in your property?

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

Base size: All households (n=2,384)

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



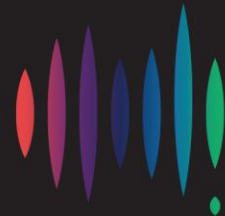
Q: Did you purchase or have this appliance or system installed in the last 12 months?

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 (n=2,384)

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



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