Household energy preferences: Research report

Prepared for the Department of Environment, Land, Water and Planning

August 2021

JWS RESEARCH

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Background, objectives and methodology

Background

Historically, natural gas has provided a cheaper, more efficient way to heat homes, provide hot water and to cook. Victoria has the highest penetration of households in Australia with mains connected gas – owing to Victoria's colder climate (relative to most other states) and its proximity to a plentiful supply of gas.

Today, this heavy reliance on gas is at odds with Victoria's push toward net zero emissions. For Victorian households, gas is no longer the cheapest way to heat spaces and water, and modern electric appliances now offer higher efficiency and lower costs.

To achieve its goal of net zero emissions by 2050, the Victorian Government, through its Gas Substitution Roadmap, is examining the potential decarbonisation pathways for Victoria's gas sector.

One way to reduce gas use in Victorian households is through 'electrification' – which involves the replacement of gas appliances with electric appliances. Electrification is likely to see a reduction in emissions as the electricity grid is increasingly supplied from renewable energy sources.

There are potential barriers to this change, including, but not limited to:

- A preference among Victorian householders to continue to use gas, or to continue with familiar appliance stock.
- The need to make a quick decision, e.g. when a hot water system breaks down, consumers are more likely to replace it with what they already have and know.
- A lack of understanding of the characteristics of modern electrical appliances.

The Department of Environment, Land, Water and Planning (DELWP) commissioned JWS Research to undertake research to better understand Victorian households' knowledge and preferences of gas and electric appliances options.

The findings from this research will be used as an input into the development of the Gas Substitution Roadmap.

Research objectives

The key objective of the research was to explore and understand household energy and appliance choices and factors in the consideration of gas and electricity as fuel sources. Specifically, the research was designed to:

- Determine types of cooking, water heating and space heating appliances currently installed in households – and whether these differ in owner-occupied homes compared to rental properties.
- Explore intention to replace key appliances and whether this will result in a change of fuel type.
- Understand relative preferences for gas or electric appliances, and reasons for these – generally, and specifically regarding key appliance types.
- Identify consideration of modern, efficient electric appliances in each key appliance type: induction cooktops, heat pump water heaters and reverse-cycle air-conditioners.
- Determine initial and considered preferences for modern, efficient electric appliances, pre and post exposure to information about efficient electric appliances.
- Understand factors inhibiting consideration of modern, efficient electric appliances, identifying language and messaging that will encourage consideration.
- Determine awareness of rebates to adopt efficient electric appliances, and the degree to which they influence future decision making around appliances.

Target audience

The research was undertaken among Victorian households within the mains connected gas network, including:

- Owner-occupiers (referred to as home owners)
- Likely home owners – i.e. people who are renting their home and who believe is it likely they will own their own home
- Investors – own a residential investment or rental property in Victoria (and therefore are also home owners or renters).

Methodology

QUANTITATIVE ONLINE SURVEY

SAMPLE SIZE

- n=1,500 Victorian home owners who live in areas that have mains connected gas available.
- n=500 likely home owners, i.e. renters who believe it is 'extremely' or 'very likely' that they will own their own home.
- n=458 investors (own a rental property) and are home owners or renters.

REPRESENTATION

- Weighting applied at the analysis stage to actual age / gender / location proportions based on ABS census data.

MARGIN OF ERROR AND CONFIDENCE LEVEL

- The maximum margin of error on the total sample of n=2,000 is +/-2.1% at the 95% confidence level
- Differences of +/-1% for net scores are due to rounding.

TIMING

- Up to 15 minutes in length.
- Conducted from 22nd July to 2nd August 2021.

The research was conducted in compliance with AS-ISO 20252.

Reporting notes: definitions

The table below shows the definitions of sub-sample segments referenced in the report:

Label	Definition
Metro	Household in greater metropolitan Melbourne in an area that has mains connected gas.
Regional	Household in regional Victoria in an area that has mains connected gas.
Home owner	A home owner who lives in an area that has mains connected gas available.
Likely home owner	People who rent a home in an area that has mains connected gas available and are 'extremely' or 'very likely' to own their own home.
Investor	Own a residential investment or rental property in Victoria (and is also a home owner or a likely home owner).
CALD	People from a Culturally and Linguistically Diverse (CALD) background. This comprises people who speak a language other than English at home and/or were born in a non-English speaking country.
Low HHI	Household income before tax of less than $50,000.
Medium HHI	Household income before tax of $50,000 to less than $100,000.
High HHI	Household income before tax of $100,000 or more.

Executive summary

Cooktops

Most Victorians have gas cooktops

Close to four in five home owners (77%) have gas cooktops. Penetration of gas cooktops is also high in rental properties (61%).

Just over one in ten home owners (11%) and rental properties (11%) have induction cooktops.

- This is significantly higher in regional areas (16%).

While Victorians prefer gas, there is an emerging shift towards induction cooktops

A clear majority of home owners and likely home owners (63%) prefer gas cooktops. More than half of home owners (52%) intend to install gas when they replace their cooktop in the next two years.

Despite the tendency to remain with gas, preferences are shifting towards induction cooktops. More than a quarter of home owners (27%) intending to replace a cooktop, plan to install induction (with some evidence of a small shift from gas to induction cooktops).

Knowledge of induction cooktops is limited

51%

Knowledge of induction cooktops is shallow, with half of home owners and likely home owners claiming they know something about them (either ‘a little’ or ‘a lot’).

However, a further third of home owners and likely home owners (33%) ‘have heard of it, but don’t know anything about it’. This gives context to its relative lower preference compared to gas.

Arguments in favour of induction cooktops are more persuasive than those against

The most compelling reasons to consider induction cooktops include:

- Have a flat surface, making them easy to clean (79% consider this a ‘very good’ or a ‘good’ reason to consider an induction cooktop).
- Are safer than traditional electric cooktops because they stay cool to touch (78%).
- Have a safety switch-off point, so if they are on for an extended period without the temperature being altered, they switch off automatically (74%).

Cooktops (cont'd)

Strength of agreement is less pronounced on arguments *against* induction cooktops, including:

- Ceramic and aluminium cookware cannot be used with an induction cooktop, so you may need to buy new cookware (58% consider this a 'very good' or a 'good' reason not to consider an induction cooktop).
- Induction cooktops, or any form of electric cooktop, do not work in a blackout (54%).

Information provides a small but significant increase in likelihood to consider induction cooktops

67% ⬆ Exposure to balanced arguments *significantly* increases the likelihood to consider installing induction cooktops (from 62% to 67% likely).

However, it is not a strong consideration; the proportion who are 'extremely likely' to consider an induction cooktop does not change. The increase comes from those who are 'very' or 'somewhat likely'.

People aged 18 to 34 years and likely home owners (i.e. renters who hope to own their own home), are most open to considering induction cooktops:

- They are most swayed by arguments in favour of induction cooktops.
- Are significantly more likely to be 'positive converters' (post information, move up the rating scale to a higher likelihood to consider induction cooktops).
- Have a higher incidence of being 'always likely' to consider induction cooktops (pre and post messaging).

Heating and cooling

Gas ducted heating and reverse cycle air conditioners are the dominant systems in Victorian homes

Half of home owners mostly use gas ducted heating to heat their homes (50%) – either as a heating only system (40%) or with add-on cooling (10%).

For cooling, half of home owners (51%) use reverse cycle air conditioners (that can both heat and cool).

- There is a higher penetration of using single unit reverse cycle air conditioners (that can both heat and cool) for cooling in regional areas (53%) (compared to 43% in Melbourne).

Thinking toward the future, reverse cycle air conditioners (that can both heat and cool) are preferred by 38% likely home owners to heat their future homes, followed by ducted reverse cycle air conditioners (22%). Only 15% prefer gas ducted heating (heating only or with add-on cooling).

For cooling, most likely home owners (52%) prefer reverse cycle air conditioners that can both heat and cool.

Victorians are more likely to add single split system reverse cycle air conditioners to their homes

Just over one in five home owners (21%) intend to change their heating or cooling systems in the next two years. There is a higher likelihood that this change will involve adding a reverse cycle air conditioner (32%), as opposed to having them replaced (20%) or removed (9%).

Arguments in favour of reverse cycle air conditioners to heat homes are more convincing than those against

The most persuasive reasons to consider reverse cycle air conditioners for heating are:

- A reverse cycle air conditioner can provide both heating and cooling for your home (74% consider this a ‘very good’ or ‘good’ reason to consider reverse cycle air conditioners to heat their home).
- A reverse cycle air conditioner is generally cheaper to run than gas heating (73%).

People aged 18 to 34 years and likely home owners (i.e. renters who hope to own their own home), find these arguments more persuasive.

Heating and cooling (cont'd)

Strength of agreement is less pronounced across all arguments *against* using reverse cycle air conditioners to heat homes, including:

- Larger houses need several split systems to heat the whole house, unlike a ducted system (59% consider this a 'very good' or a 'good' reason not to consider reverse cycle air conditioners for heating).
- The internal units on split systems can only push air so far, meaning they struggle to maintain the same level of heating comfort for large rooms or spaces with interior walls (56%).

Information increases consideration of reverse cycle air conditioners for heating

Exposure to balanced arguments *significantly* increases the likelihood to consider installing both types of reverse cycle air conditioners as the main heater:

- **Split system reverse cycle air conditioners** – from 62% to 66% likely (with a *significant* decrease from 32% to 27% in those who are 'unlikely').
- **Ducted reverse cycle air conditioners** – from 51% to 57% likely (with a *significant* decrease from 41% to 35% in those who are 'unlikely').

Again, consideration is not strong, with the increase coming from those who are 'very' or 'somewhat likely'.

There is a higher incidence of being 'always likely' to consider both types of air conditioners (pre and post messaging) among:

- People aged 18 to 34 years, and likely home owners, people from CALD backgrounds, and those with high household incomes.

In considering **split system reverse cycle air conditioners as the main heater**:

- People aged 55 years and over are significantly more likely to be 'positive converters' (post information, move up the rating scale to a higher likelihood to consider reverse cycle air conditioners for heating).

In considering **ducted reverse cycle air conditioners as the main heater**:

- People in regional areas are significantly more likely to be 'positive converters'.

Hot water systems

Gas is the most prevalent hot water system

Over three in five home owners (63%) have gas (storage or instantaneous) hot water systems. This is significantly higher among those aged 55 years and over (70%).

There is growing intention to move away from gas hot water systems

While the majority of home owners (35%) intend to replace their old hot water system with a gas system, there is a leaning toward other options.

Over a quarter (28%) of home owners intending to replace their system in the next two years are planning to install a solar hot water system.

- People of CALD background are significantly more likely to install solar hot water systems (44%).
- People aged 18 to 34 years (37%) have a significantly higher preference for solar hot water.

More than one in eight home owners are planning to install heat pump water heaters (13%) in the next two years.

Arguments for heat pump water heaters have more traction than those against

The most persuasive arguments in favour of heat pump water heaters include:

- Heat pump water heaters can have lower running costs than gas water heaters and are always lower than running costs for traditional electric water heaters (72% consider this a ‘very good’ or ‘good’ reason to consider heat pump water heaters).
- Heat pump water heaters absorb warmth from the air and transfer it to heat water. This makes them more energy efficient that other hot water systems (70%).

Arguments *against* heat pump water heaters are not as compelling, including:

- Heat pump water heaters are more expensive to buy than gas or electric water heaters (59% consider this a ‘very good’ or a ‘good’ reason not to consider an heat pump water heater).
- A heat pump water heater uses a tank to store hot water, and so it could run out on days when my household uses a lot of hot water (58%).

Hot water systems (cont'd)

Increased knowledge has a mixed impact on consideration of heat pump water heaters

67%

The majority of home owners and likely home owners either have never heard of heat pumps (34%) or don't know anything about them (33%).

Exposure to balanced arguments *shifts* those with an unformed opinion ('can't say') to being either 'likely' or 'unlikely' to consider heat pump water heaters:

- Those who 'can't say' significantly decreases from 22% to 12%.
- There is a significant increase in both those who are 'likely' to consider (from 53% to 57%) and those who are 'unlikely' to consider (from 25% to 31%).

People aged 18 to 34 years, and likely home owners, are more open to considering heat pump water heaters.

- They are more likely to be swayed by arguments in favour of heat pump water heaters.
- They are significantly more likely to be 'positive converters' (post messaging, move up the rating scale to a higher likelihood to consider heat pump water heaters).
- They have a higher incidence of being 'always likely' to consider heat pump water heaters (pre and post messaging).

There is also a higher incidence of people from CALD backgrounds and those with high household incomes being 'always likely' to consider heat pump water heaters.

Some home owners are motivated by a rebate to install a heat pump or solar water heater

Around one third of home owners (31%) claim to be aware of the Victorian Government's Solar Homes program rebates (including 10% who are 'definitely aware).

Among those eligible for the rebate, 48% are likely to install a heat pump or solar water heater (including 11% who say they are 'definitely likely' to do so.

If the rebate were made accessible to the 25% of home owners who do not perceive they are currently eligible, 16% claim they would definitely install a heat pump or solar water heater (a further 48% may do so).

Likely home owners

Likely home owners have a different profile to the general population

Likely home owners skew younger (66% are aged 18 to 34 years, 30% are aged 35 to 54 years and 5% are aged 55 years and over). They are also more likely to be Melbourne based (81% compared to 76% of the population). There is also a higher incidence of people from CALD backgrounds among renters (42% compared to 28% of the population).

A desire to have mains connected gas in future homes

The majority of likely home owners (i.e. renters who hope to own their own home) would like to have mains connected gas in their future home (71%). Only 11% claim they want electricity only. The remainder either have no preference (14%) or are not sure (4%).

Likely home owners are more open to induction cooktops than average

Likely home owners are significantly more likely than average to know 'something' about induction cooktops (68% compared to 61% on average). This translates into a higher consideration of induction cooktops for their future home (77% compared to 62% on average).

Even though they are more open to induction cooktops initially, there is a higher incidence of 'positive converters' among likely home owners (i.e. their likelihood to consider increases). The arguments in favour of induction cooktops resonate among this group.

Preferences for heating systems among likely home owners are divided

When it comes to heating and cooling their future home:

- For **heating**, a mix of systems are nominated. Split system reverse cycle air conditioners (that can both heat and cool) are preferred (38% of likely home owners), followed by ducted reverse cycle air conditioners (22%). Only 15% prefer gas ducted heating (heating only or with add-on cooling).
- For cooling, most likely home owners (52%) prefer reverse cycle air conditioners that can both heat and cool, followed by a ducted reverse cycle air conditioner (20%).

Likely home owners (cont'd)

Likely home owners are more likely than the population on average to consider reverse cycle air conditioners for heating

Likely home owners are significantly more likely than average to consider reverse cycle air conditioners as the main heater in the home.

There is a higher incidence of 'always' being likely to consider reverse cycle air conditioners among this cohort (pre and post arguments). That said, likely home owners are significantly more likely to agree with all of the arguments for reverse cycle air conditioners to heat the home.

Solar hot water is preferred among likely home owners

Likely home owners have a preference for solar hot water (40%) over gas hot water (34%).

There is nevertheless an openness to consider heat pump water heaters

This cohort have greater claimed knowledge of heat pump hot water heaters than the population at large (35% compared to 27%). They also have a significantly higher likelihood to consider a heat pump water heater for their future home.

Likely home owners find all the arguments for heat pump water heaters more compelling than average. There is a higher incidence of 'positive converters' among this group, and they are 'always likely' to consider a heat pump water heat (pre and post arguments).

Investors

Most investors have gas cooktops in their rental property, with around half open to induction

The vast majority (61%) of investors have gas cooktops in their rental properties. One in ten (11%) have induction cooktops installed.

However, there is openness among investors to consider installing an induction cooktop. Close to half of investors (45%) are either ‘extremely’, ‘very likely’ or ‘somewhat likely’ to consider an induction cooktop for their rental property.

- This is lower than the 62% of home owners and likely home owners who would consider an induction cooktop for their home.

Split system reverse cycle air conditioners are frequently used, but investors are divided in opinion on their use for heating

Two in five investors (43%) have reverse cycle air conditioners (heat and cool) in their rental properties.

- This is significantly higher in regional areas (54%).
- Just over one in five investors (23%) have split systems that cool only in their rental property.

A third of investors have gas ducted heating (35%), including those who have gas ducted heating with add-on cooling. A quarter of investors (24%) do not have any whole-of-house heating or cooling systems installed in their rental properties.

Investors lean more toward being ‘likely’ than ‘unlikely’ to consider reverse cycle air conditioners for heating in their rental properties:

51% are ‘likely’ to consider split system reverse cycle air conditioners as the main heater, but 39% are ‘unlikely’.

49% are ‘likely’ to consider ducted reverse cycle air conditioners as the main heater, but 41% are ‘unlikely’.

In both instances, investors are ‘very’ or ‘somewhat likely’ to consider reverse cycle air conditioners for heating, moreso than being ‘extremely likely’ to do so.

Investors (cont'd)

Gas is the prevalent hot water system, with investors polarised in their consideration of heat pump water heaters

Just under half of investors (47%) have gas (storage or instantaneous) hot water systems installed in their rental properties. Only 7% have a heat pump water heater.

Investors are polarised in their likelihood to consider heat pump water heaters for their rental properties. Just over two in five (42%) are 'likely' to do so, with a similar proportion (43%) 'unlikely' to consider these.

Detailed findings

Cooktops

Section summary – Cooktops

There is an emerging shift towards induction cooktops

While just under one in ten home owners have induction cooktops, more than a quarter of those intending to replace a cooktop plan to install induction. Furthermore, two in three households would consider one for their home (either 'somewhat', 'very' or 'extremely likely'). Despite this, gas remains the dominant and preferred cooktop (by the vast majority of households).

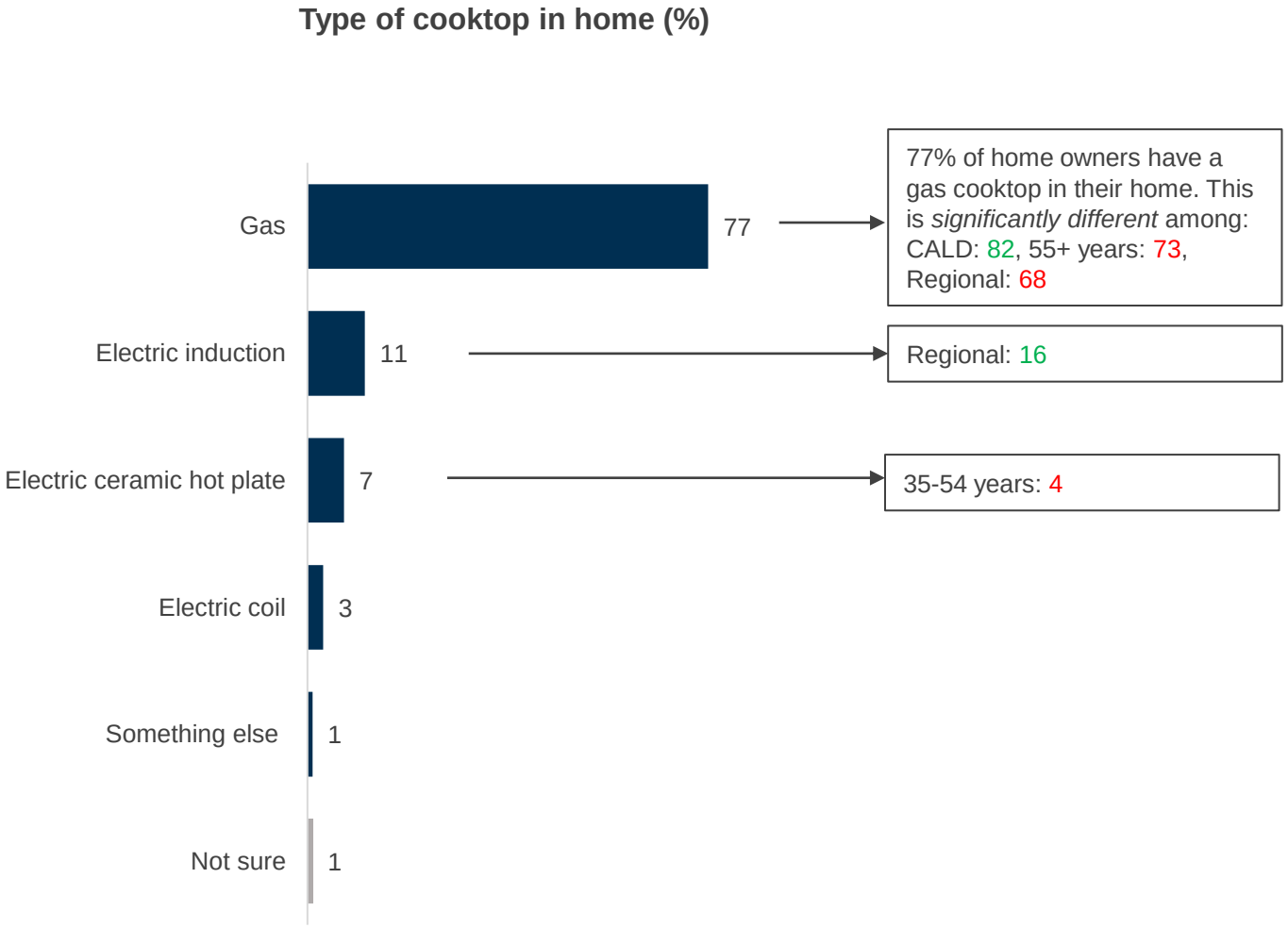
Arguments *for* induction cooktops are more convincing

Despite shallow knowledge of induction cooktops, most home owners and likely home owners find arguments in favour of induction more persuasive than those against. Being easy to clean and improved safety are the most compelling reasons to consider induction. Having to buy new cookware and not working during a blackout are slightly more of a deterrent than added installation and purchase costs.

Messaging has a small impact on consideration of induction cooktops

Intention to consider induction cooktops increases *significantly* following consideration of balanced arguments, noting the proportion who are 'extremely likely' to consider induction cooktops does not change. The increase is in 'very' or 'somewhat likely' to do so. Increased likelihood to consider induction cooktops comes from likely home owners and the 18 to 34 year olds.

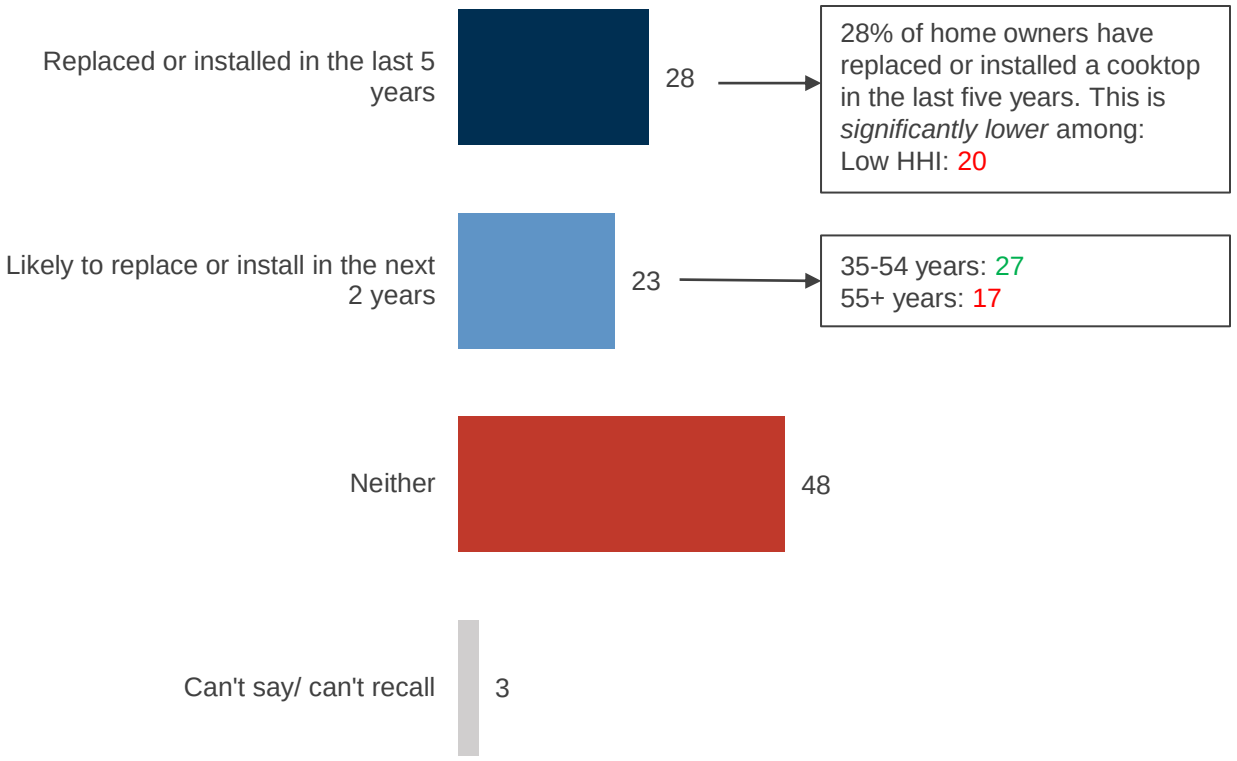
The majority of home owners have gas cooktops in their homes



Significantly higher / lower than the total at the 95% confidence interval.
Q4. What type of cooktop do you currently have in your home, is the cooktop…
Base: Home owners (n=1,500)

Just under a quarter of home owners intend to replace or install a cooktop in the next two years

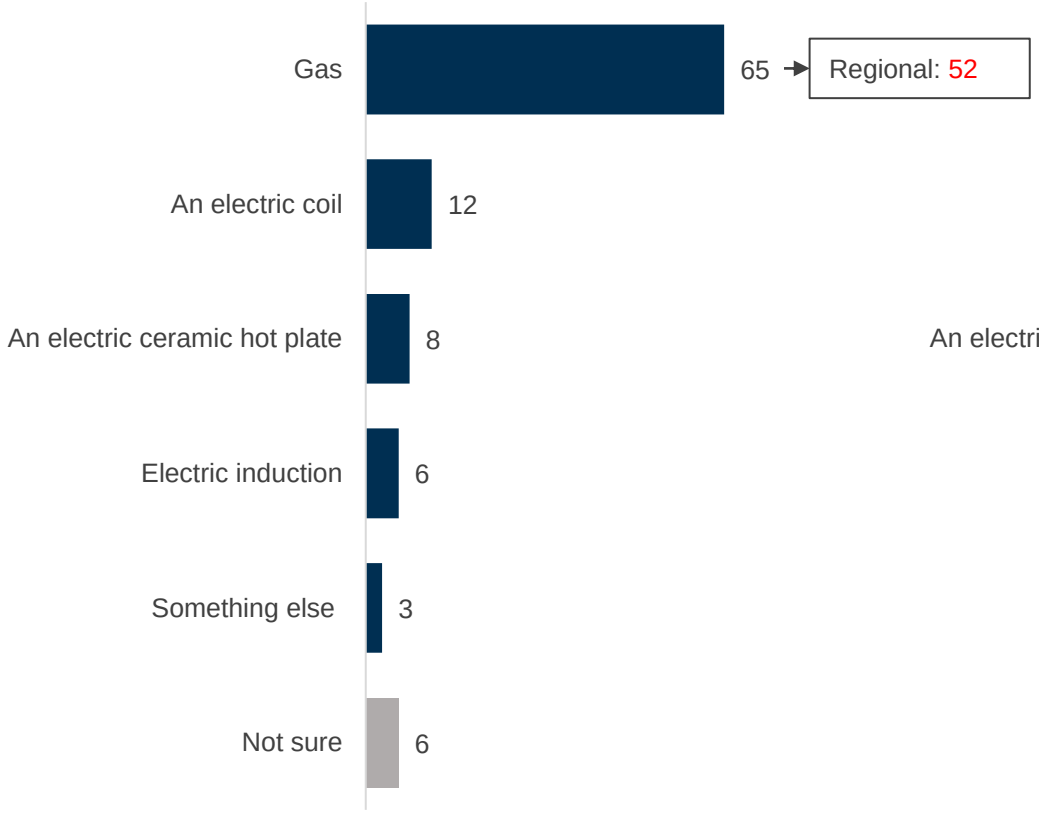
Installation of cooktop (%)
(multiple response)



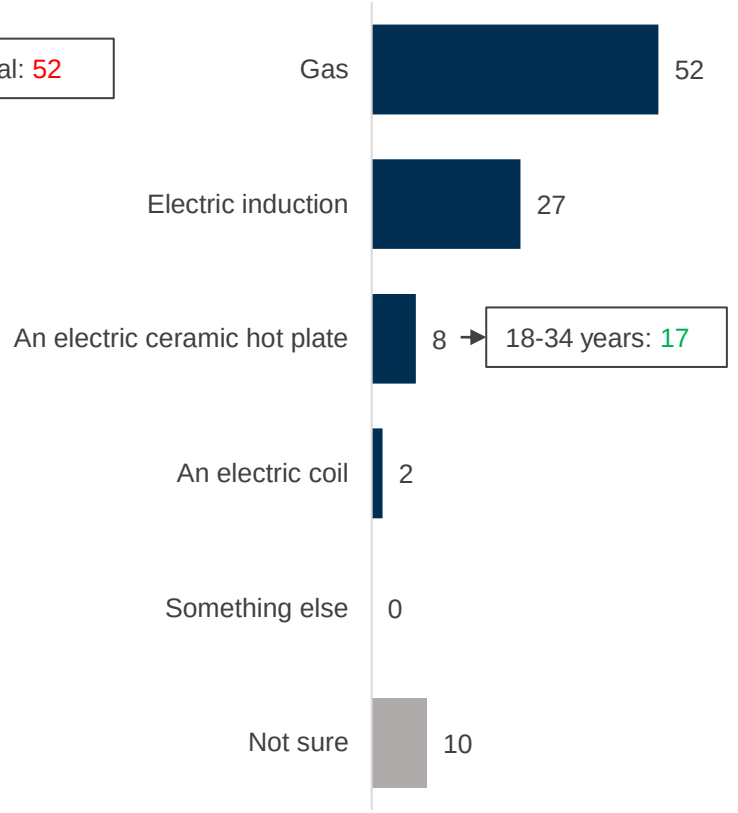
Significantly higher / lower than the total at the 95% confidence interval.
Q3. Which of the following items have you replaced or installed in your current home in the last 5 years, or do you plan to replace or install in the next 2 years? Select all that apply
Base: Home owners (n=1,500)

Gas is the most frequently replaced and installed cooktop among home owners

Type of cooktop replaced in home in the last five years (%)
(among those who replaced a cooktop)



Type of cooktop intending to install in the next two years (%)
(among those intending to replace a cooktop)



Significantly higher / lower than the total at the 95% confidence interval.
Q5a. Was your old cooktop, the one that you replaced most recently in your home… / Q5b. When you replace your cooktop, what type of cooktop do you intend to install in your home…
Base: Home owners who replaced a cooktop in the last five years (n=416); home owners likely to replace a cooktop in the next two years (n=336)

Most home owners tend to switch their cooktops 'like for like'

28% of home owners replaced or installed a cooktop in the last five years

	Type of cooktop replaced			
	Gas (n=271)	Electric induction (n=24)*	An electric coil (n=49)*	An electric ceramic hotplate (n=34)*
% of home owners had this cooktop (among those who have replaced):	73%	18%	3%	6%
Current cooktop				
Gas	87	28	39	28
Electric induction	11	54	25	40
An electric coil	1	7	18	0
An electric ceramic hotplate	1	11	17	32

Of the 28% of home owners that installed a cooktop, 73% had a gas cooktop. Most of these home owners (87%) replaced their gas cooktop like for like. One in 10 (11%) switched from gas to electric induction.

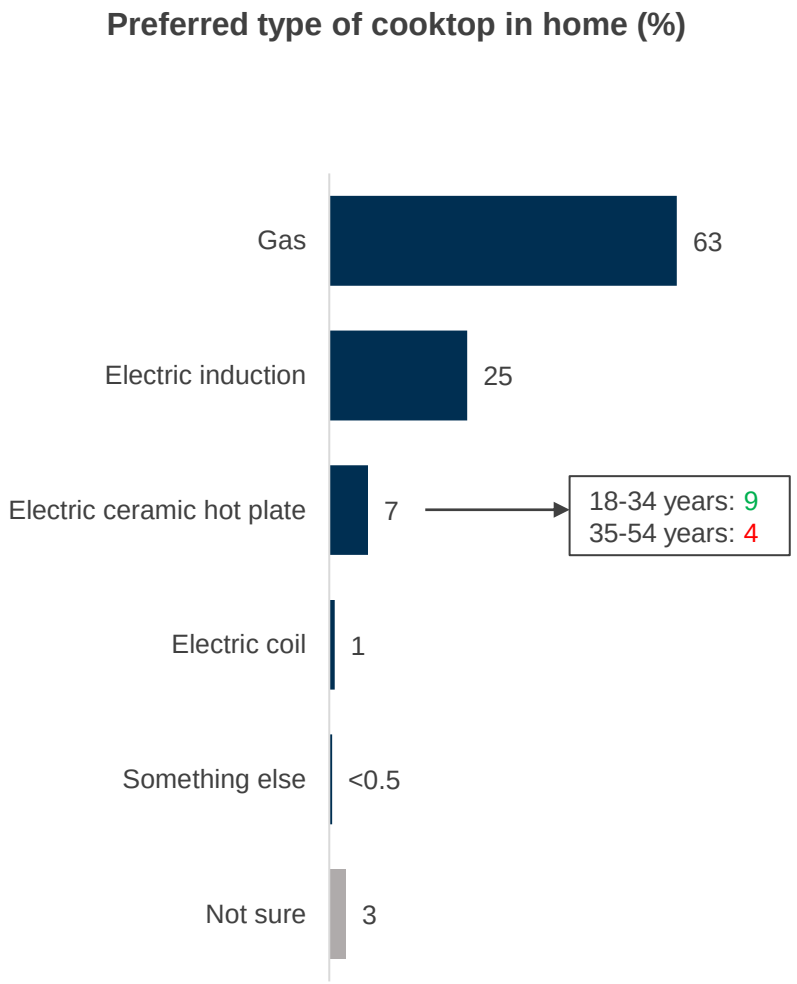
23% of home owners are likely to replace or install a cooktop in the next two years

	Type of cooktop currently in home			
	Gas (n=250)	Electric induction (n=25)*	An electric coil (n=19)*	An electric ceramic hotplate (n=34)*
% of home owners have this cooktop (among those likely to install):	75%	8%	6%	10%
Cooktop likely to install				
Gas	61	14	49	16
Electric induction	22	78	18	40
An electric coil	1	0	10	8
An electric ceramic hotplate	6	7	11	27

Of the 23% of home owners that are planning to replace or install a cooktop, 75% have a gas cooktop. Most of these home owners (61%) expect to replace this like for like. More than one in five (22%) plan to switch from gas to electric induction.

** Caution: Small sample size (n<50).*
Q4. What type of cooktop do you currently have in your home, is the cooktop… / Q5a. Was your old cooktop, the one that you replaced most recently in your home… / Q5b. When you replace your cooktop, what type of cooktop do you intend to install in your home…
Base: Home owners who replaced a cooktop in the last five years (n=416); home owners likely to replace a cooktop in the next two years (n=336)

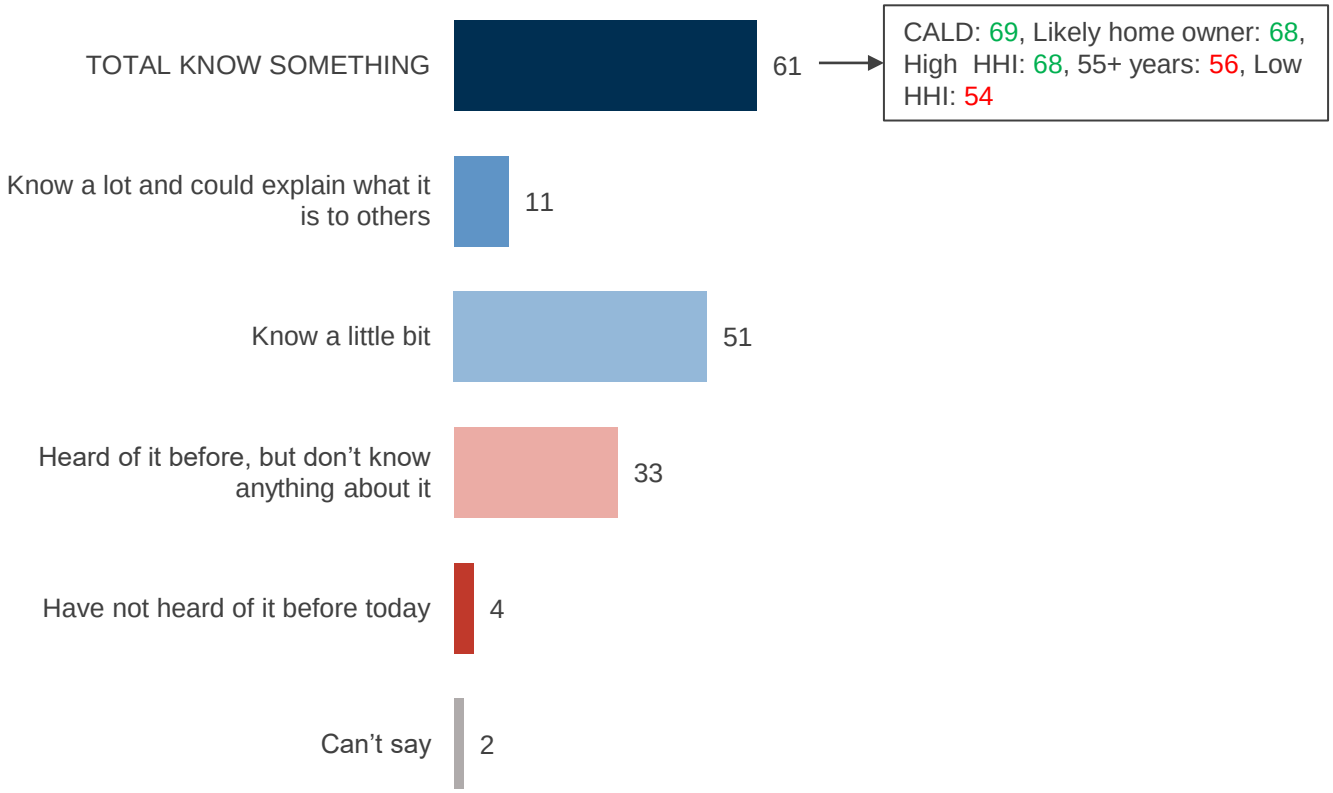
Although a quarter of current and likely home owners prefer electric induction cooktops, the majority want gas



Significantly higher / lower than the total at the 95% confidence interval.
Q6. What type of cooktop would you most prefer to have in your home? Would you say you would prefer a cooktop that is…
Base: All respondents (n=2,000)

Most current and likely home owners have some knowledge of induction cooktops, but do not know a lot

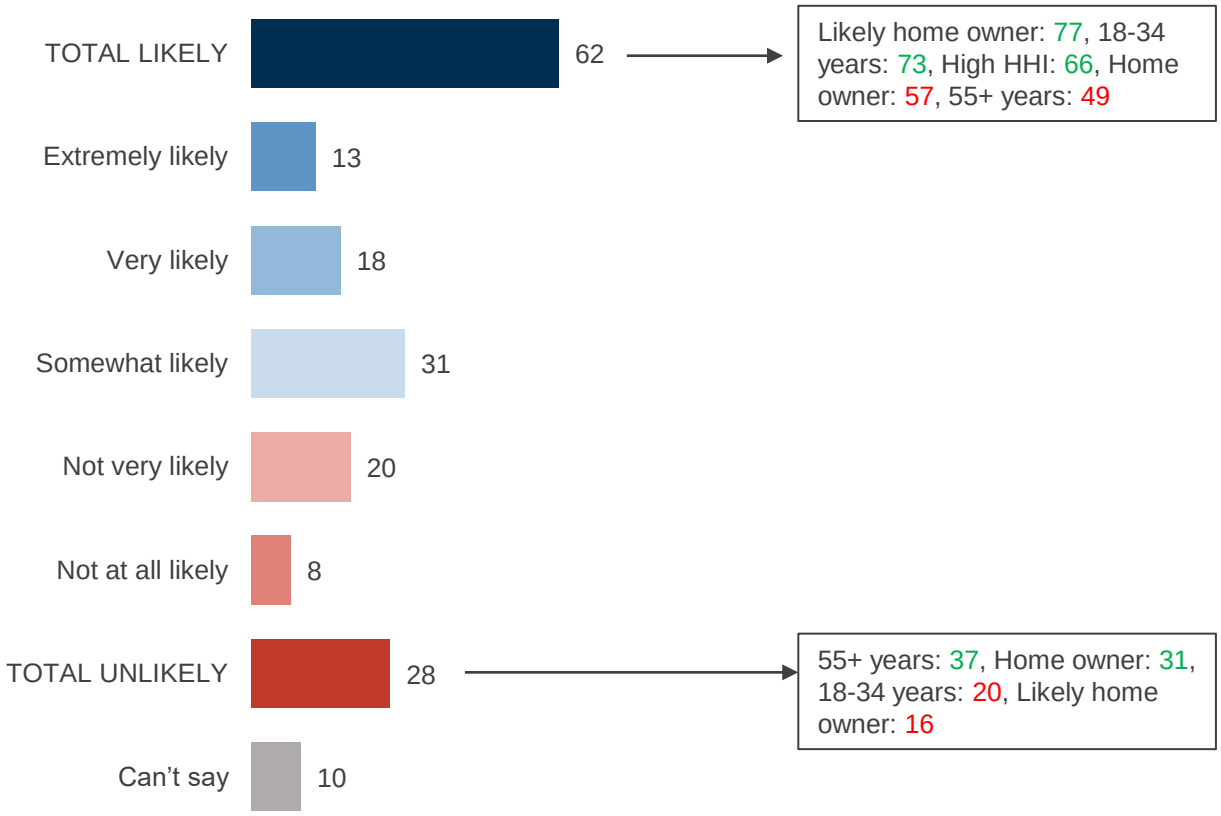
Awareness of induction cooktops (%)



Significantly higher / lower than the total at the 95% confidence interval.
Q7. How much would you say you know about induction cooktops. Would you say you…
Base: All respondents (n=2,000)

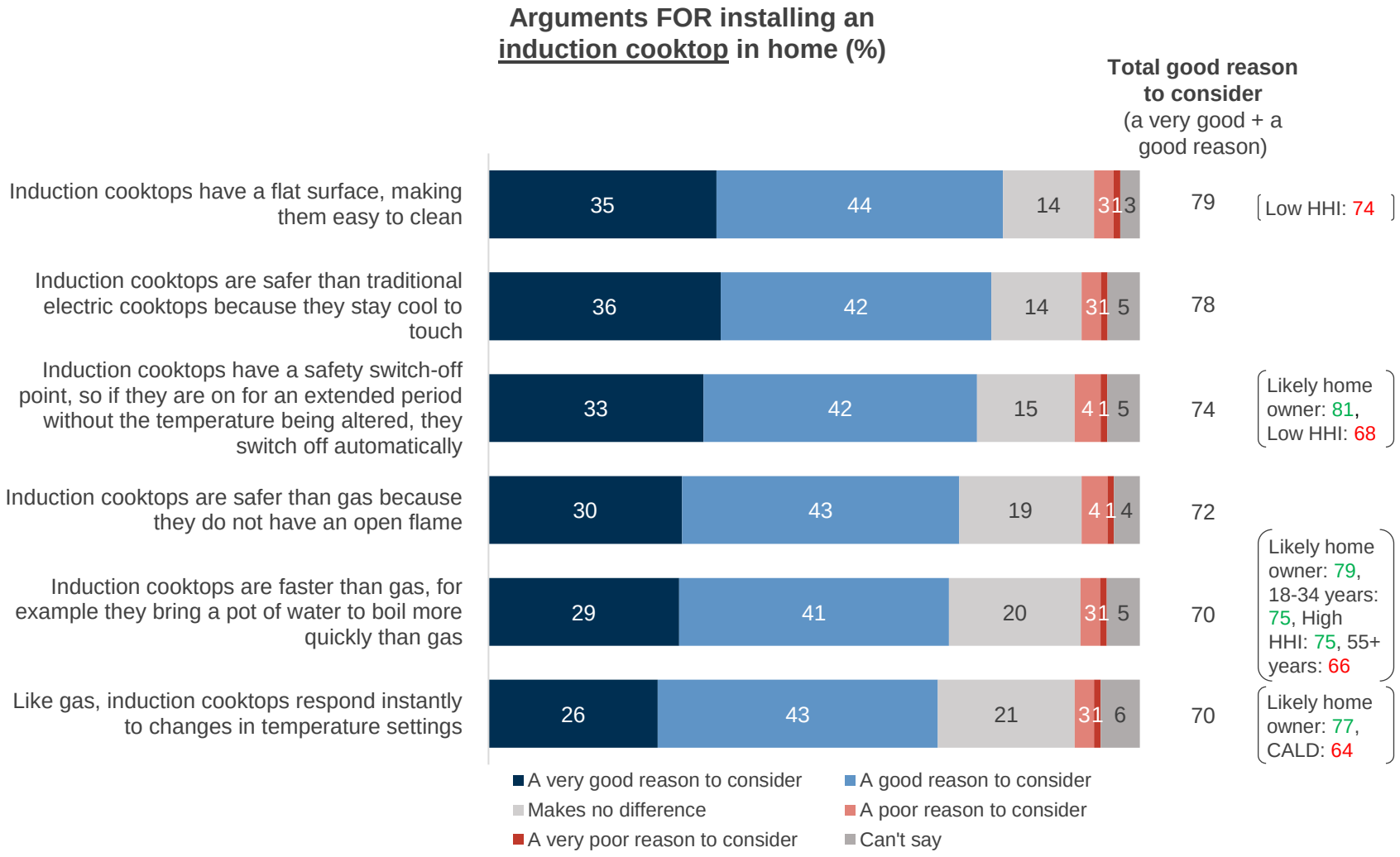
The majority of current and likely home owners are likely to consider an induction cooktop

Likelihood to consider an induction cooktop in home (%)



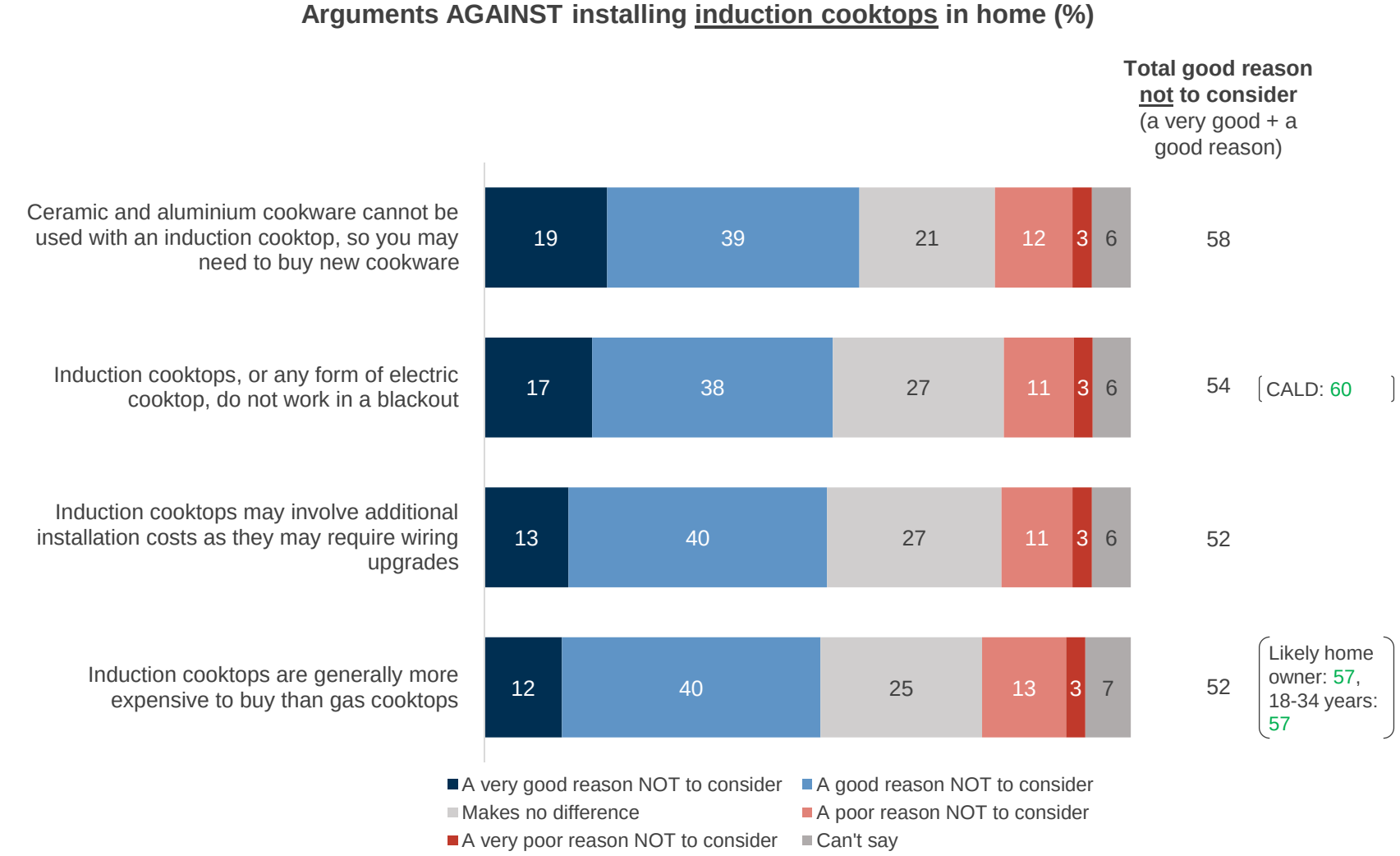
Significantly higher / lower than the total at the 95% confidence interval.
Q8. How likely would you be to consider an induction cooktop for your home? Would you say you are…
Base: All respondents (n=2,000)

Being easy to clean and safer than traditional electric cooktops are arguments that resonate most strongly



Significantly higher / lower than the total at the 95% confidence interval.
*Q9. Below are some arguments in favour of induction cooktops. To what extent do you think each statement is a good or a poor **reason to consider** installing an induction cooktop in your home? If you already have an induction cooktop, please rate the statements on whether it is a good or poor reason to have an induction cooktop.*
Base: All respondents (n=2,000)

The need to buy new cookware is a leading argument against induction cooktops



Significantly higher than the total at the 95% confidence interval.
*Q10. Below are some arguments that have been made against induction cooktops. To what extent do you think each statement is a good or a poor **reason to NOT consider** installing an induction cooktop in your home?*
Base: All respondents (n=2,000)

‘Considered’ views explained

JWS Research’s Campaign Converter™ analysis shows how the likelihood of considering an induction cooktop in the home changes following consideration of balanced messaging about these – namely arguments in support, and arguments against, induction cooktops.

At the start of the section on cooktops in the survey, respondents were asked their likelihood to consider an induction cooktop for their home (likely home owners were asked to think about the home they might own, and people who already have an induction cooktop were asked if they would consider installing one again). This is called the ‘initial likelihood’ to consider an induction cooktop (Q8). The chart overleaf shows that, prior to provision of any information, fewer than a third of respondents (31%) are ‘extremely’ or ‘very likely’ to consider an induction cooktop; a further 31% are ‘somewhat likely’. Less than three in 10 respondents (28%) are unlikely to consider an induction cooktop (with the remaining 10% unsure).

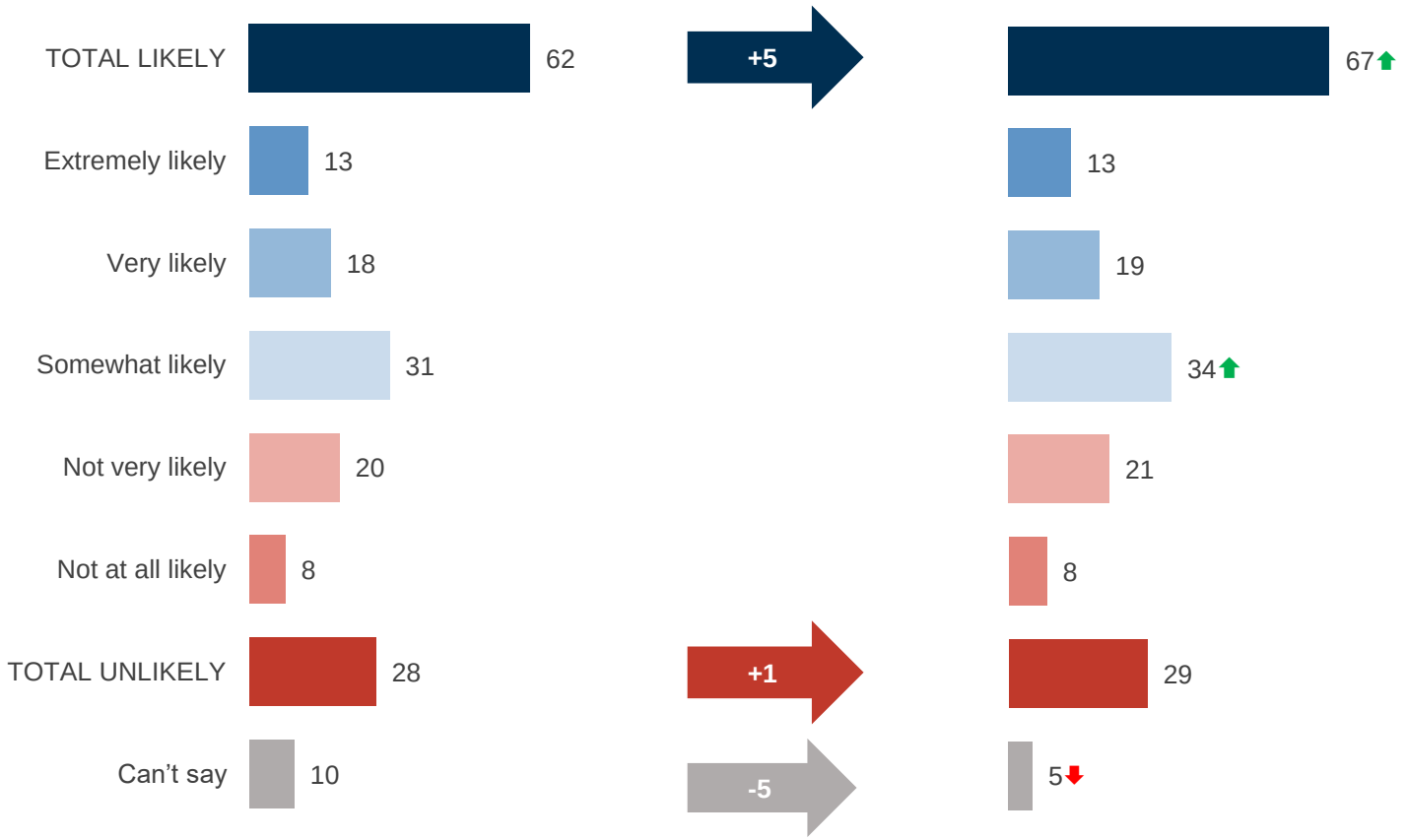
Survey respondents were then provided with balanced messaging about induction cooktops – arguments in favour of induction cooktops, and others against induction cooktops – and asked the extent to which each argument is a ‘good’ or ‘poor’ reason to consider an induction cooktop.

Respondents were then again asked their likelihood to consider an induction cooktop for their home, being their ‘considered likelihood’ (Q11).

What we see is that **the balanced messaging about induction cooktops makes a small positive impact at the total level on likelihood to install an induction cooktop.** A third of respondents (33%) are ‘extremely’ or ‘very likely’ to consider an induction cooktop (up from 31%).

- Taking into account those who are *‘somewhat likely’* to install an induction cooktop, total likelihood increases significantly from 62% to 67%.

Exposure to arguments for and against induction cooktops has a small impact on consideration



Q8. How likely would you be to consider an induction cooktop for your home? Would you say you are… / Q11. On consideration of the information, how likely would you be to consider an induction cooktop for your home? Would you say you are…
Base: All respondents (n=2,000)
Significantly higher ⬆ / lower ⬇ than the initial measure at the 95% confidence interval.

Converter Analysis explained

The previous page demonstrates that at the total level there is an increase in likelihood to consider an induction cooktop in the home following exposure to arguments about these.

Delving into the data at an individual respondent level provides further insight. The chart overleaf places survey respondents into categories to show how perceptions either change or stay the same between their 'initial' and 'considered' likelihood, post review of the arguments provided.

56% of respondents are 'always likely' to consider induction cooktops

The respondents who we classify as 'always likely' to consider induction cooktops initially stated that they are 'extremely', 'very' or 'somewhat likely' to consider an induction cooktop. Following exposure to arguments for and against induction cooktops, they again claim they are either 'extremely', 'very' or 'somewhat likely' to consider an induction cooktop (i.e. their considered likelihood). That is, the arguments both for and against do not change their views (into being 'unlikely' to consider induction cooktops).

There is a significantly higher incidence of being 'always likely' to consider induction cooktops among 18 to 34 year olds and people with a high household income.

21% of respondents are 'positive converters'

These are the people who, irrespective of their likelihood to consider an induction cooktop initially, are more likely to do so after considering the information (i.e. they move up the scale). For example, a respondent might be 'not very likely' to consider an induction cooktop initially, and the arguments gave that person reason to now feel 'somewhat likely' to consider an induction cooktop.

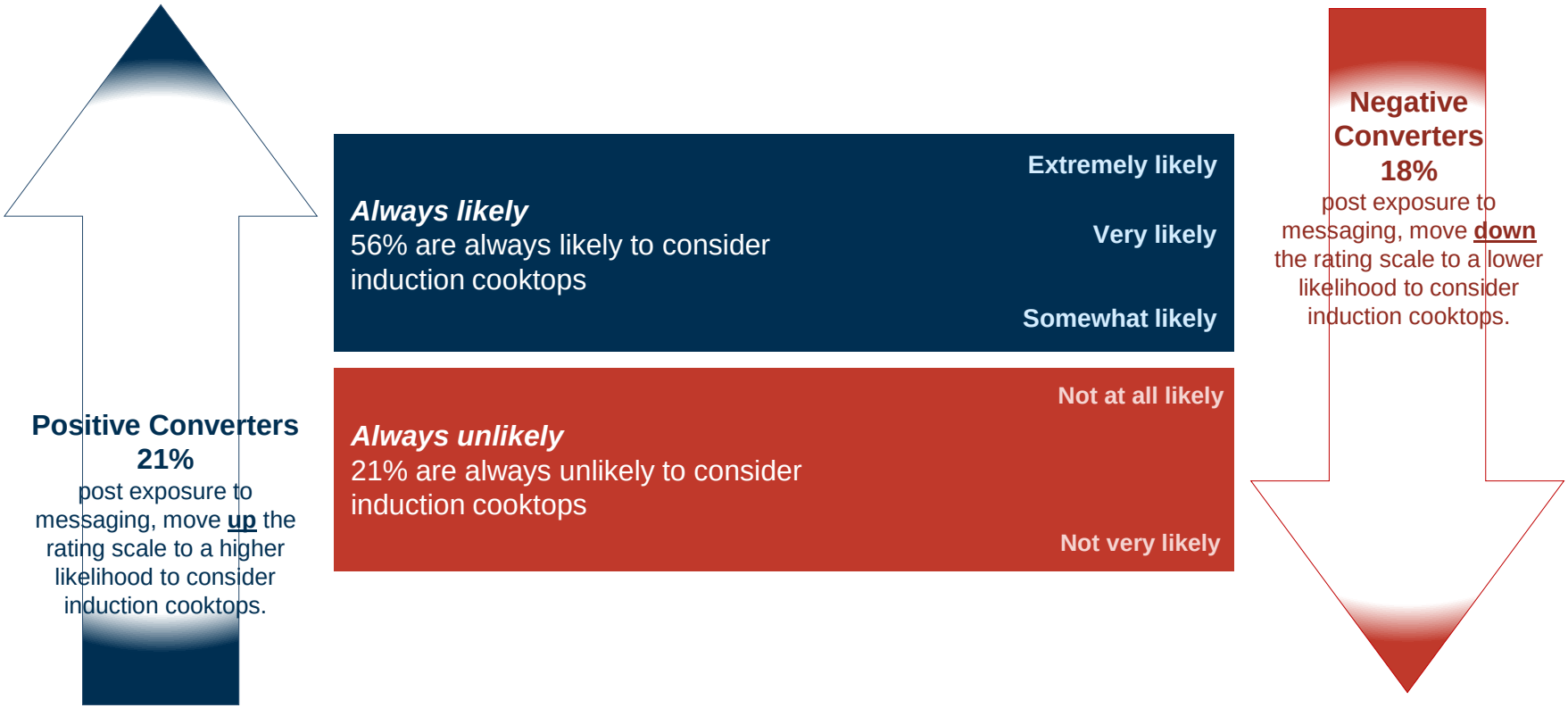
Another respondent may feel 'somewhat likely' to consider an induction cooktop initially, and on consideration of the arguments, now feels 'very likely'. These people are described as positive converters as they have moved up the scale, however they also fall into the 'always likely' category as well. There is a higher incidence of 'positive converters' among 18 to 34 year olds.

18% of respondents are 'negative converters'

'Negative converters' are those who move down the likelihood scale after considering the arguments provided. 'Negative converters' are evenly spread across all cohorts.

Positive converters are balanced out by negative converters after consideration of information

Converter analysis shows the movement in claimed likelihood to consider an induction cooktop following exposure to balanced messaging (i.e. arguments for and against).



Note: Converter analysis categories are not mutually exclusive, therefore the percentages add to more than 100%.

People aged 18 to 34 years are most open to considering induction cooktops and are swayed by the arguments

Positive Converters (21%)

There is **a *higher incidence* of positive converters among people aged 18 to 34 years** (27%).

- And also **among likely home owners** (26%).

Positive converters are convinced by the arguments in favour of induction cooktops. They are:

- **Significantly *more likely* than average to agree with the arguments in favour of induction cooktops**.
- As likely as the population on average to agree with the arguments against induction cooktops.

Negative Converters (18%)

Negative converters are equally represented among all demographic and geographic cohorts.

Negative converters are swayed by the arguments against induction cooktops. They are:

- As likely as the population on average to agree with the arguments in favour of induction cooktops.
- **Significantly *more likely* than average to agree with the arguments against induction cooktops.**

Always likely (56%)

There is **a *higher incidence* of always being likely to consider an induction cooktop among people aged 18 to 34 years** (67%) and people with a **high household income** (62%).

- And **also among likely home owners** (71%).

Those who are 'always likely' are swayed more by the arguments in favour of induction cooktops. They are:

- **Significantly *more likely* than average to agree with the arguments in favour of induction cooktops.**
- Significantly *less likely* than average to agree with the arguments against induction cooktops.

Always unlikely (21%)

There is **a *higher incidence* of always being unlikely to consider an induction cooktop among people aged 55+ years** (20%).

And **also among home owners** (24%) – noting most home owners are aged 55+ years.

Those who are 'always unlikely' are swayed more by the arguments against induction cooktops than the arguments for these. They are:

- Significantly *less likely* than average to agree with the arguments in favour of induction cooktops.
- **Significantly *more likely* than average to agree with the arguments against induction cooktops.**

Heating and cooling

Section summary – Heating and cooling

Reverse cycle air conditioners mainly used for cooling

Home owners most frequently have gas ducted heating (some with cooling add-on) and reverse cycle air conditioners. There is a significantly higher incidence of the latter in regional areas (single room unit systems), and they are more frequently used to cool, rather than heat homes. These units are more likely to be added to homes in the next two years, as opposed to being removed or replaced.

Trade offs in weighing the merits of reverse cycle air conditioners for heating

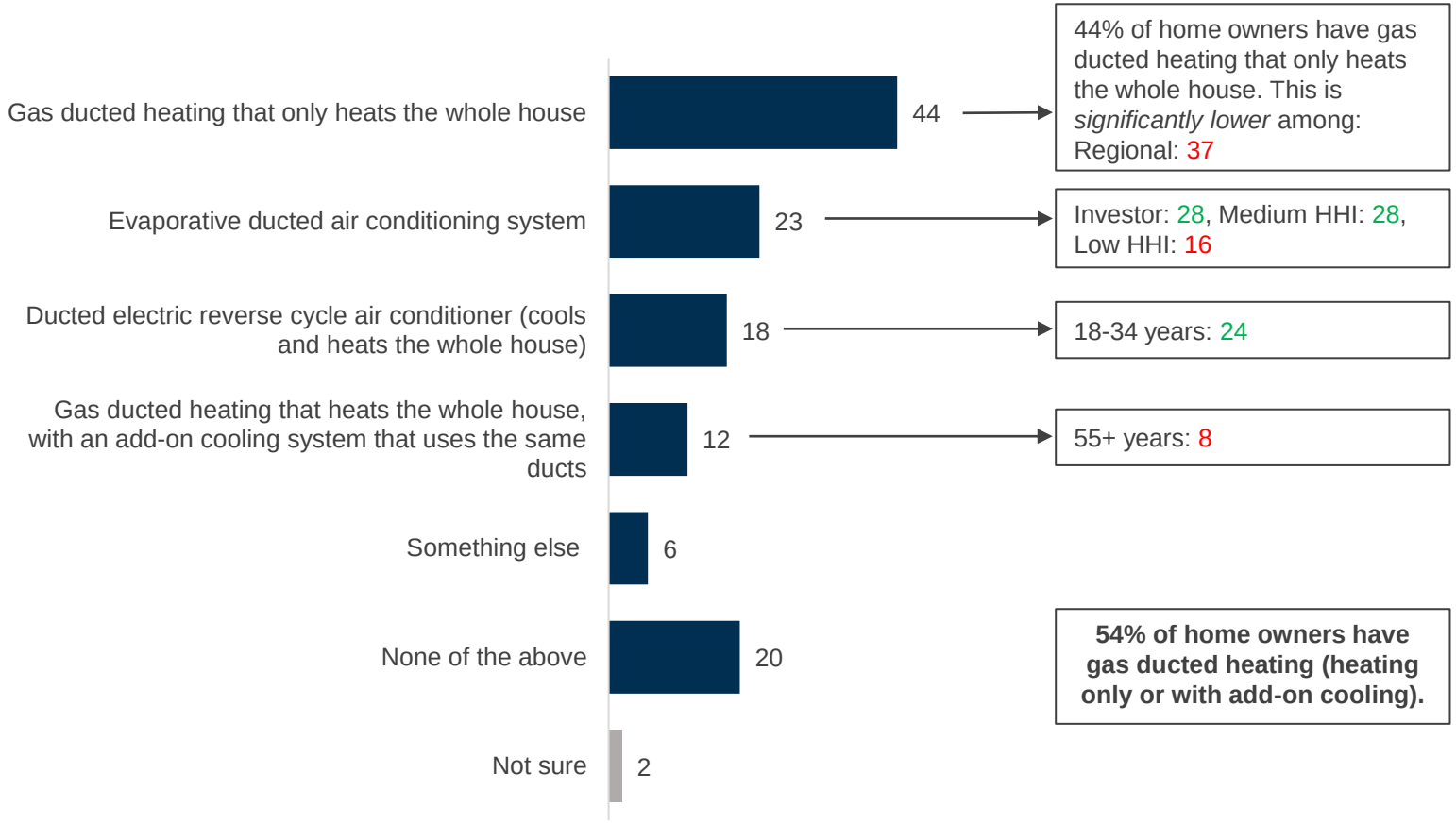
Arguments in favour of reverse cycle air conditioners for heating have more traction than those against, particularly among 18 to 34 year olds, and the likely home owners. Ability to heat and cool and being cheaper than gas heating are the most convincing. In the context of arguments against, the focus is on split systems – the need for several to heat larger houses and their reduced heating comfort.

Messaging has a small positive impact on consideration

Intention to consider both split system and ducted reverse cycle air conditioners as the main heater increases *significantly* upon consideration of balanced arguments. For both, there is a shift from those who are 'unlikely' to those who are 'somewhat likely' to consider these units as their main heater. People aged 55+ years have an increased likelihood to consider a split system unit; those in regional areas increasing will consider ducted systems.

More than half of home owners have gas ducted heating that only heats the whole house (some with add-on cooling)

Heating or cooling systems that work across entire home (%)
(multiple response)

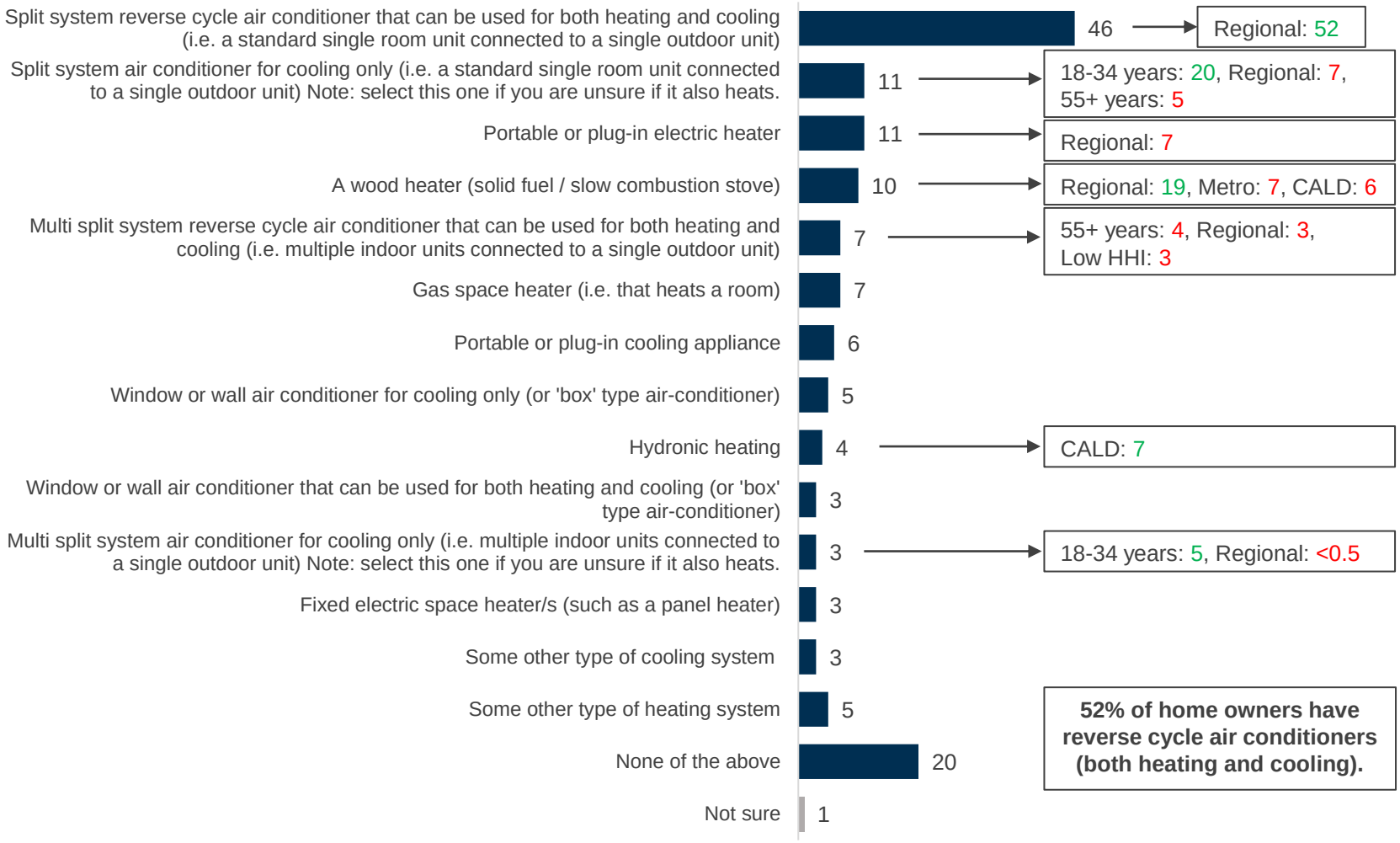


Significantly higher / lower than the total at the 95% confidence interval.
*Q12. Do you have any of the following heating or cooling systems that **work across your entire home**? (In the following questions, we will ask about heating or cooling appliances that work in individual rooms). Please select all that apply.*
Base: Home owners (n=1,500)

Split system reverse cycle air conditioner (heats and cools) is most common in individual rooms

Heating or cooling appliances that heat or cool individual rooms in home (%)

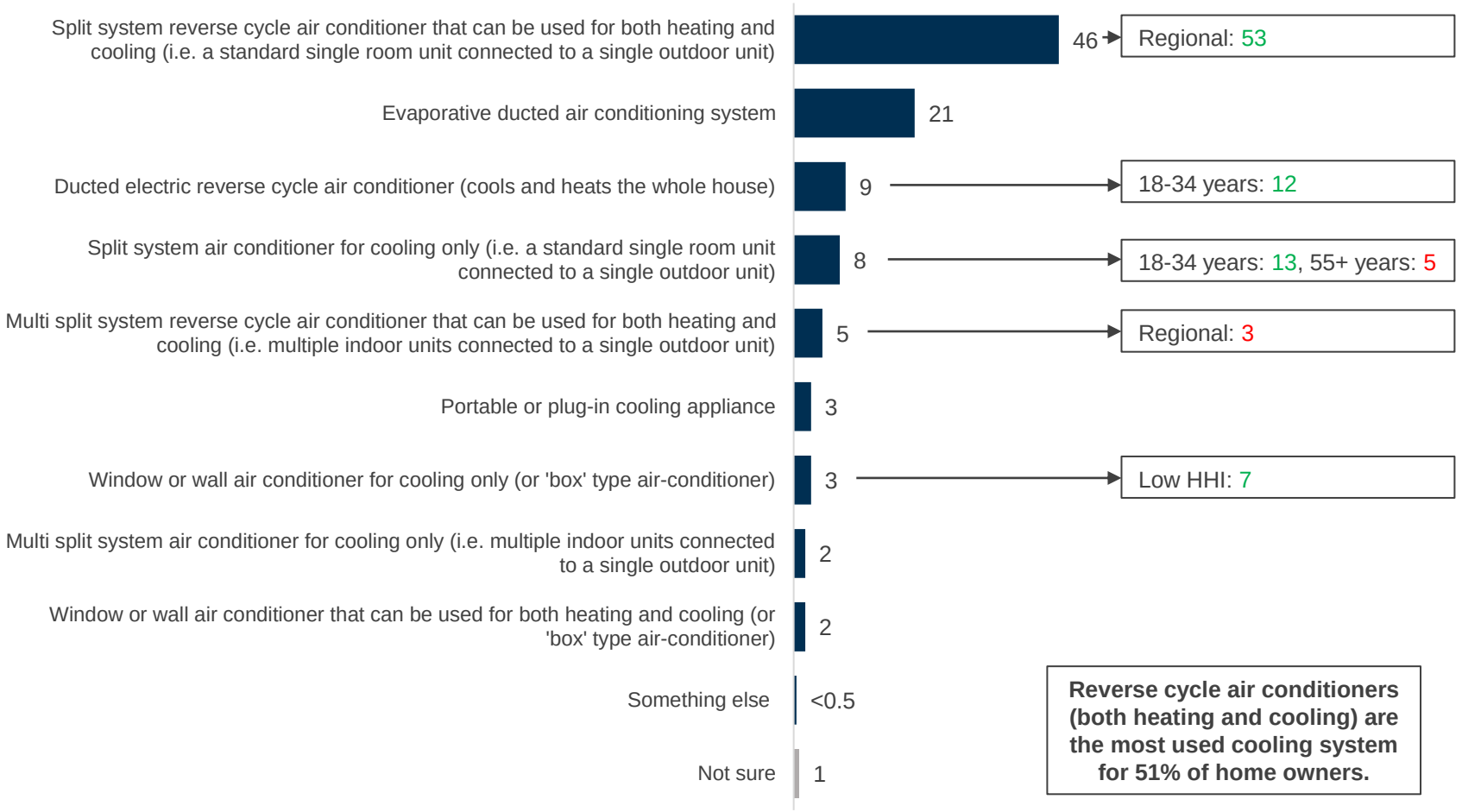
(multiple response)



Significantly higher / lower than the total at the 95% confidence interval.
*Q13. Do you have any of the following heating or cooling appliances that heat or cool **individual rooms** in your home? Please select all that apply.*
Base: Home owners (n=1,500)

Split system reverse cycle air conditioners (heats and cools) are the most commonly used cooling systems

Most used cooling system or air conditioning in home (%)

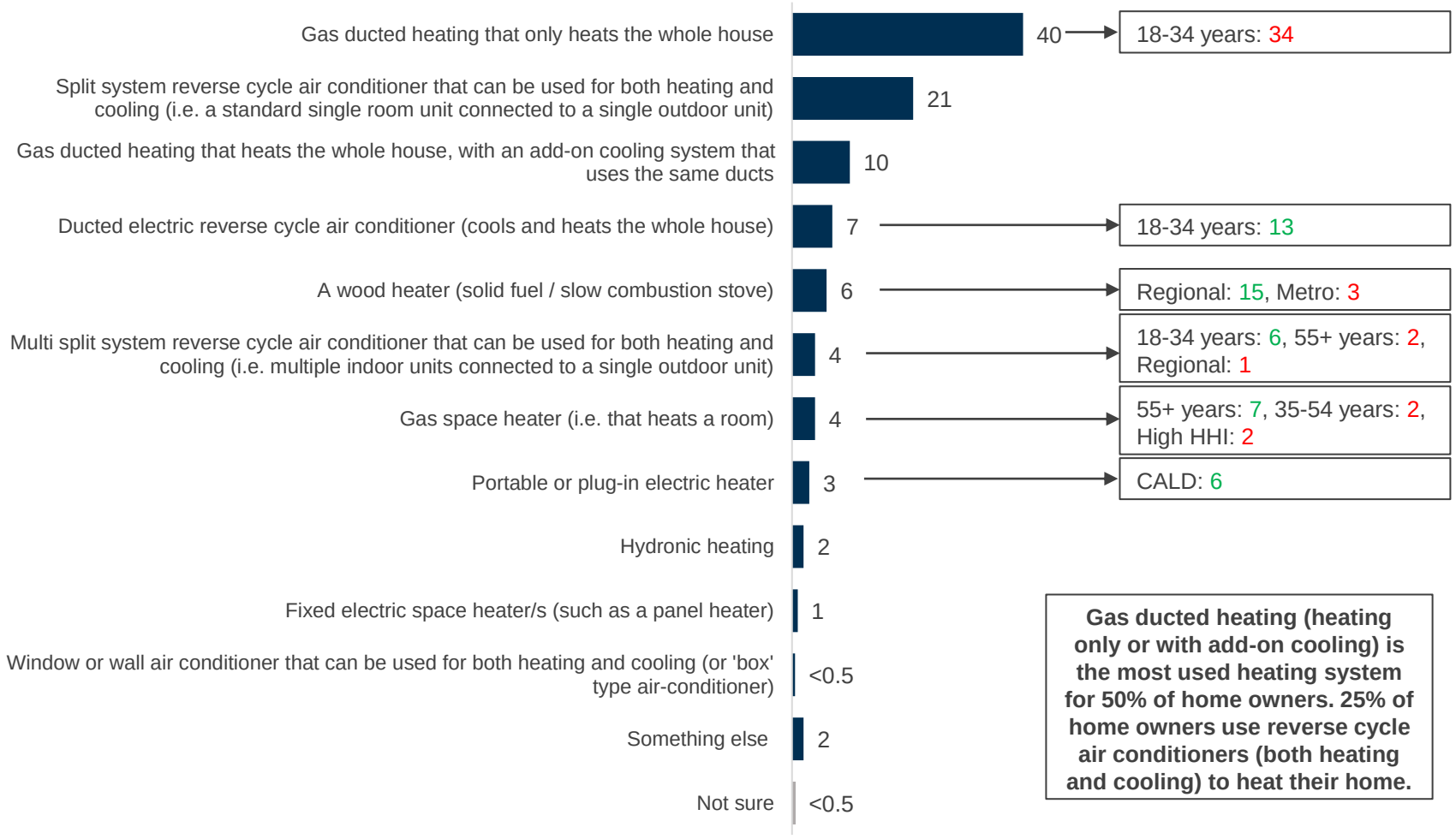


Reverse cycle air conditioners (both heating and cooling) are the most used cooling system for 51% of home owners.

Significantly higher / lower than the total at the 95% confidence interval.
Q15. What type of cooling system or air conditioning do you mostly use to cool your home …
Base: Home owners with more than one type of air conditioning in home (n=1,275)

Gas ducted heating is the most used system to heat the home, followed by reverse cycle air conditioning

Type of heater or heating system most used in home (%)



Gas ducted heating (heating only or with add-on cooling) is the most used heating system for 50% of home owners. 25% of home owners use reverse cycle air conditioners (both heating and cooling) to heat their home.

Significantly higher / lower than the total at the 95% confidence interval.
Q15a. What type of heater or heating system do you mostly use to heat your home …
Base: Home owners with more than one type of heating in home (n=1,405)

Heating or cooling appliances are most frequently in living rooms, followed by bedrooms

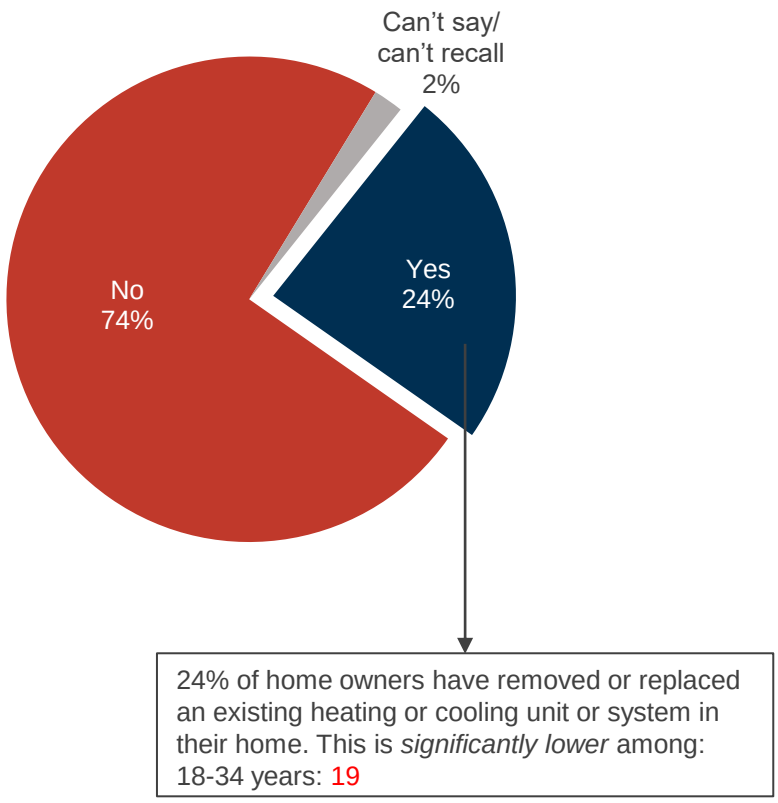
Number of heating or cooling appliances used in individual rooms (%)

	Split system air conditioner for cooling only (i.e. a standard single room unit connected to a single outdoor unit) (n=161)	Split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. a standard single room unit connected to a single outdoor unit) (n=700)	Multi split system air conditioner for cooling only (i.e. multiple indoor units connected to a single outdoor unit) (n=44)*	Multi split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. multiple indoor units connected to a single outdoor unit) (n=101)	Window or wall air conditioner for cooling only (or 'box' type air-conditioner) (n=79)	Window or wall air conditioner that can be used for both heating and cooling only (or 'box' type air-conditioner) (n=41)*	Gas space heater (n=102)	Fixed electric space heater/s (such as a panel heater) (n=51)
% of home owners that have this appliance:	11%	46%	3%	7%	3%	5%	7%	3%
Living room								
One	74	84	58	62	70	71	80	34
Two or more	4	3	21	10	1	0	2	6
Bedrooms								
One	30	24	37	25	21	16	7	28
Two or more	20	13	40	46	4	5	1	21
Other rooms								
One	19	19	49	33	31	32	31	43
Two or more	4	2	14	14	0	3	1	13

** Caution: Small sample size (n<50).*
Q14. For each of the following heating or cooling appliances you have in your home, could you tell us how many of each appliance you have in your home, and in which rooms …
Base: Home owners who have select appliances to heat or cool individual rooms.

A quarter of home owners have removed or replaced their existing heating or cooling unit or system

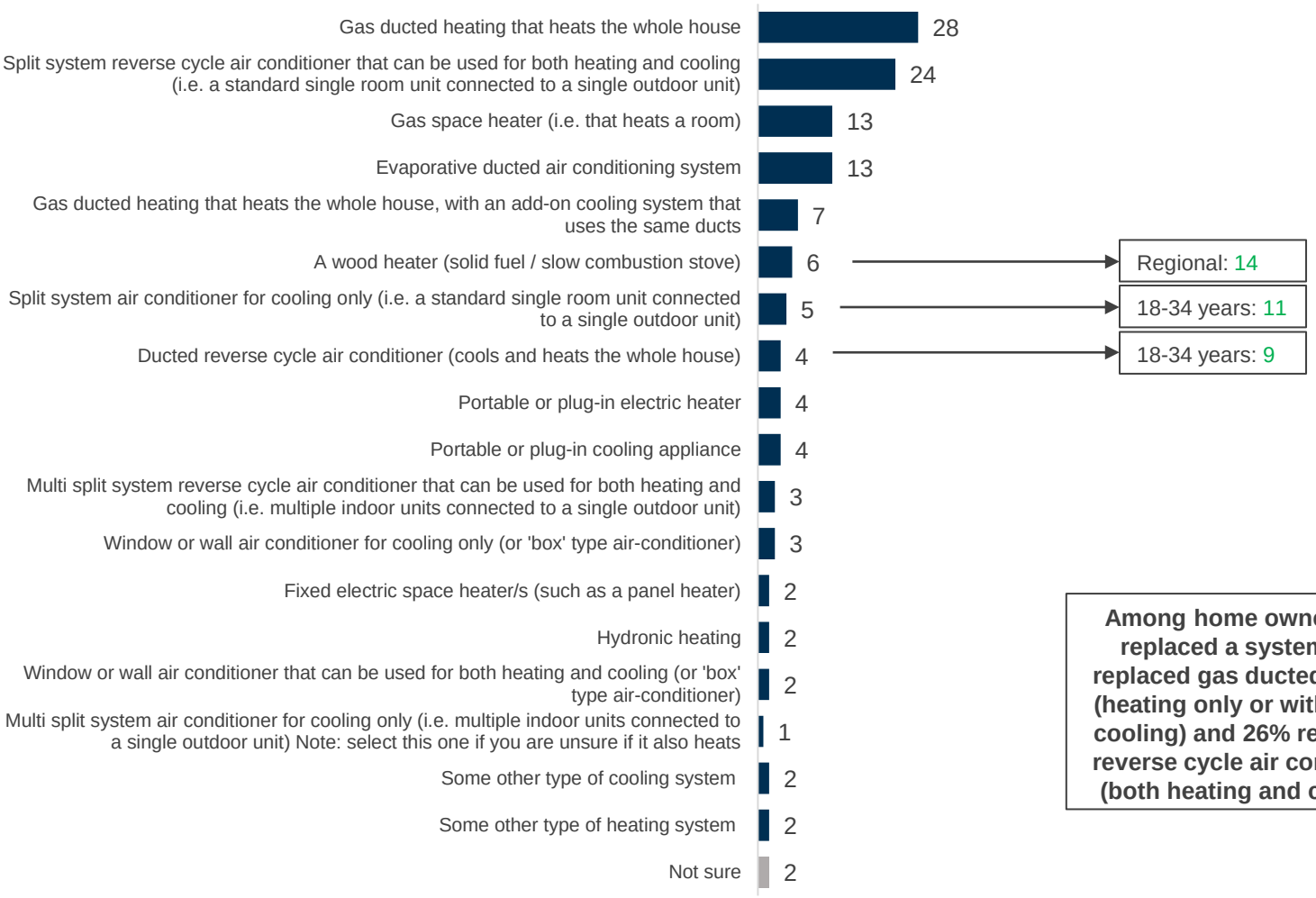
Removed or replaced existing heating or cooling unit or system in home



Significantly lower than the total at the 95% confidence interval.
Q16. In the last five years, have you removed or replaced an existing heating or cooling unit or system (or both) that you had in your home?
Base: Home owners (n=1,500)

A third of home owners have replaced gas ducted heating, a further 13% have replaced a gas space heater

Heating or cooling unit or system replaced (%)
(among those who have replaced a system)



Among home owners who replaced a system, 35% replaced gas ducted heating (heating only or with add-on cooling) and 26% replaced a reverse cycle air conditioner (both heating and cooling).

Significantly higher than the total at the 95% confidence interval.
Q16a. We are interested to know what type of heating or cooling unit or system (or both) you removed or replaced, i.e. what was your old heating or cooling appliances or systems that was taken out? Please select all that apply.
Base: Home owners who have replaced heating or cooling unit or system in home (n=367)

Most home owners have replaced heating and cooling systems 'like for like'

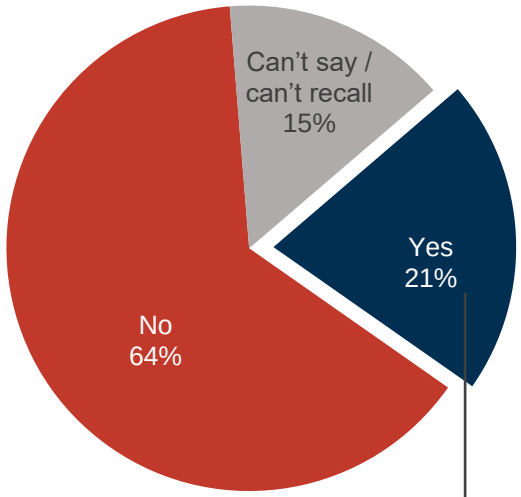
24% of home owners removed or replaced an existing heating or cooling unit or system in the last five years

	Type of heating or cooling system replaced (select units and systems only)					
	NETT gas ducted (n=129)	Gas ducted heating that heats the whole house (n=103)	Gas ducted heating, with an add-on cooling system that uses the same ducts (n=27)*	NETT reverse cycle air conditioning (n=92)	Split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. a standard single room unit) (n=83)	Multi split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. multiple indoor units) (n=9)*
% of home owners had this system (among those who have replaced):	35%	28%	7%	26%	24%	3%
Current heating or cooling system						
NETT gas ducted	**83**	87	66	33	33	36
Gas ducted heating that heats the whole house	65	77	20	28	30	11
Gas ducted heating, with an add-on cooling system that uses the same ducts	19	11	53	8	5	26
NETT reverse cycle air conditioning	50	51	45	**87**	89	64
Split system reverse cycle air conditioner, both heating and cooling (i.e. a standard single room unit)	44	45	40	81	87	24
Multi split system reverse cycle air conditioner, both heating and cooling (i.e. multiple indoor units)	8	8	8	8	3	53

Caution: Small sample size (n<50).
Q.12, Q.13, Q.16a.
Base: Home owners who have replaced heating or cooling unit or system in home (n=367)

One in five home owners are likely to change heating or cooling systems (or both) in next two years

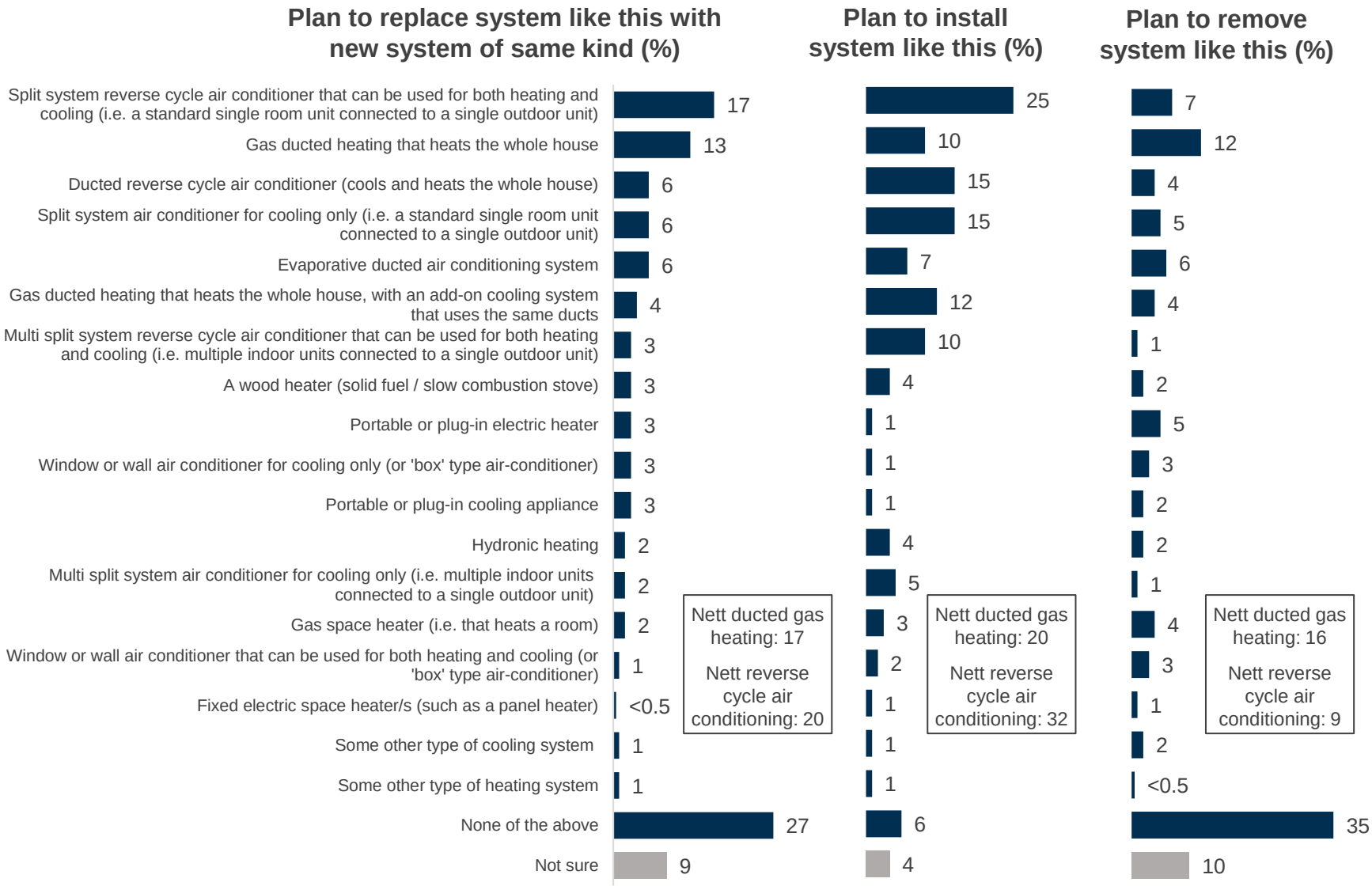
Likelihood of changing heating or cooling units or systems in home



21% of home owners are likely to change the heating or cooling units or systems (or both) in their home in the next two years. This is *significantly different* among: 18-34 years: 29, 35-54 years: 26, 55+ years: 12

Significantly higher / lower than the total at the 95% confidence interval.
Q16b. In the next two years, are you likely to change the heating or cooling units or systems (or both) in your home? This may be to replace an existing unit or system, to remove an unwanted system, or to add some additional heating or cooling appliances or systems to your home.
Base: Home owners (n=1,500)

Higher likelihood that air conditioners will be added to homes, as opposed to being removed or replaced



Q16d. Please tell us how you intend to change the heating or cooling appliances or systems in your home. We are interested in what systems you plan to remove completely, what systems you intend to install (i.e. adding additional heating or cooling options to your home), and what systems you intend to replace with a system of the same kind. Please select all that apply.
Base: Home owners likely to install heating or cooling in the next two years (n=313)

Intended change over of heating and cooling units and systems for select systems (findings are indicative only)

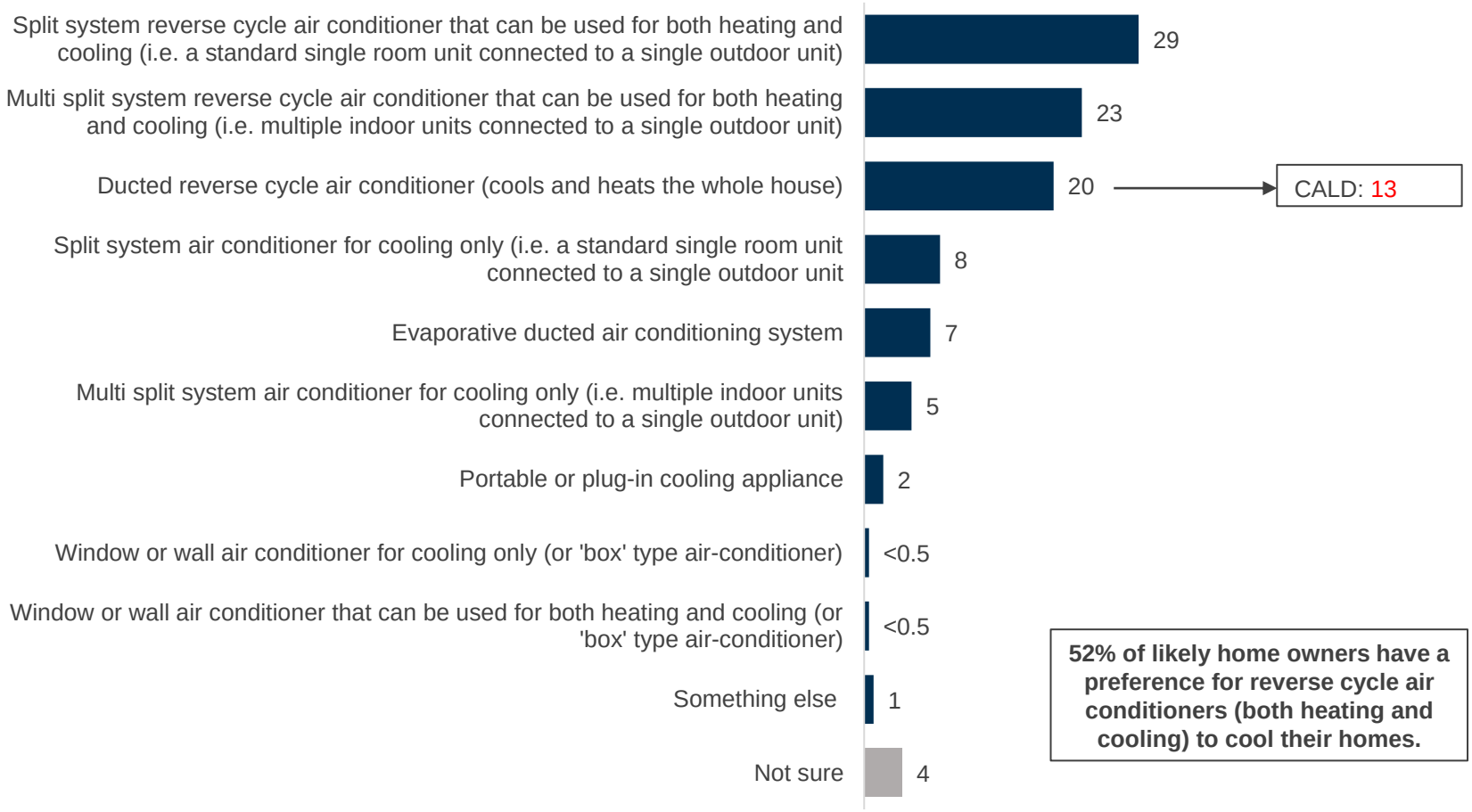
21% of home owners are likely to change a heating or cooling unit or system in the next two years

	Type of heating or cooling system planning to remove (select units and systems only)					
	NETT gas ducted (n=49)*	Gas ducted heating that heats the whole house (n=37)*	Gas ducted heating, with an add-on cooling system that uses the same ducts (n=12)*	NETT reverse cycle air conditioning (n=27)*	Split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. a standard single room unit) (n=23)*	Multi split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. multiple indoor units) (n=4)*
% of home owners planning to remove this system (among those planning to change):	16%	12%	4%	9%	7%	1%
Heating or cooling system planning to install						
NETT gas ducted	**40**	34	55	15	14	21
Gas ducted heating that heats the whole house	20	20	20	0	0	0
Gas ducted heating, with an add-on cooling system that uses the same ducts	27	21	45	15	14	21
NETT reverse cycle air conditioning	18	22	8	**62**	67	37
Split system reverse cycle air conditioner, both heating and cooling (i.e. a standard single room unit)	8	9	8	35	42	0
Multi split system reverse cycle air conditioner, both heating and cooling (i.e. multiple indoor units)	14	19	0	30	28	37

Caution: Small sample size (n<50).
Q.16b / Q.16d.
Base: Home owners who are planning to remove a heating or cooling system in the next two years (n=311)

Half of likely home owners have a preference for reverse cycle air conditioners to cool their homes

Future preference of cooling system or air conditioning for likely home owners (%)

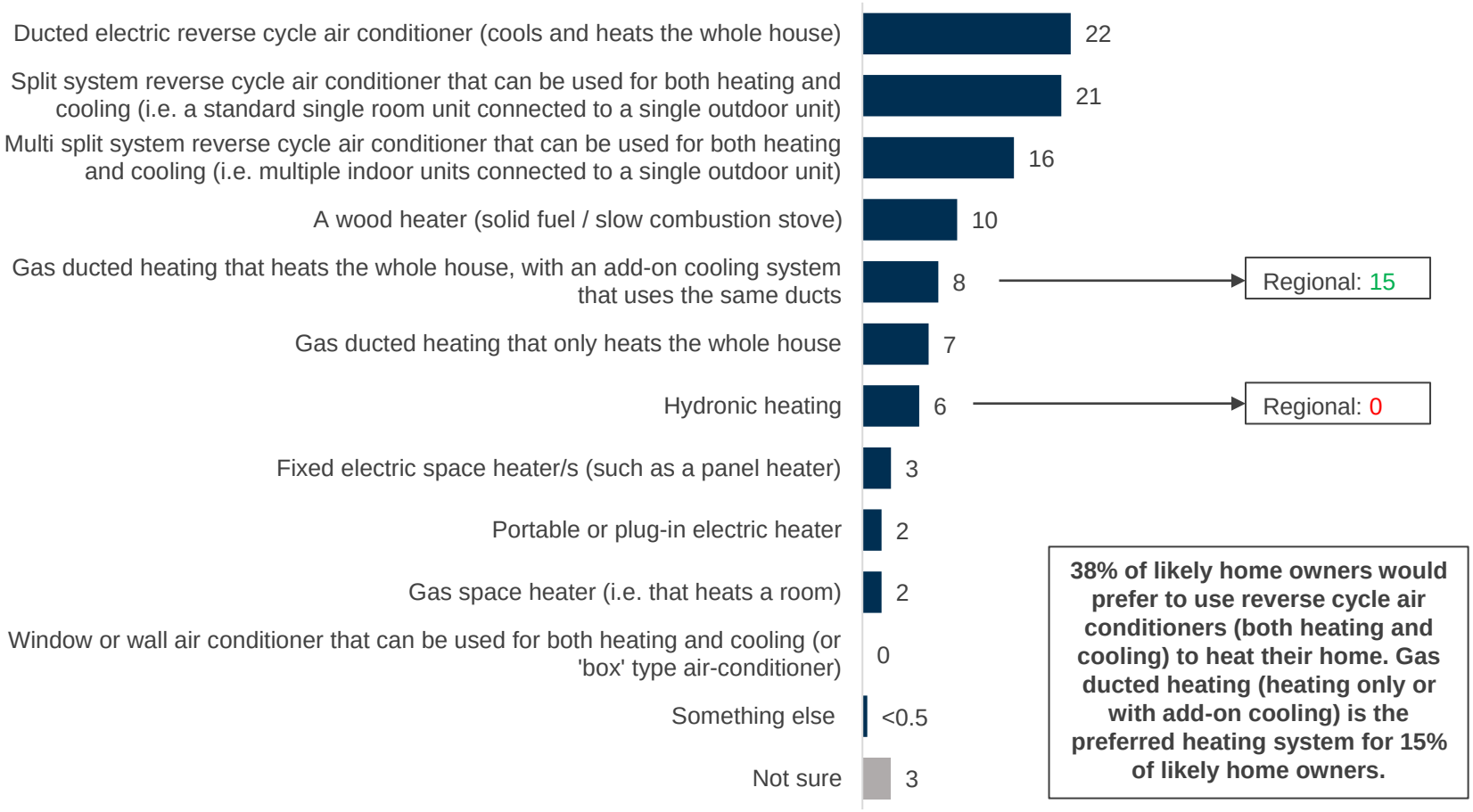


52% of likely home owners have a preference for reverse cycle air conditioners (both heating and cooling) to cool their homes.

Significantly lower than the total at the 95% confidence interval.
Q16e. Thinking about your future home that you might own, what type of cooling system or air conditioning would you prefer to mostly use to cool your home…
Base: Likely home owners (n=500)

Likely homes owners do not have a clear preference for heating, but lean toward reverse cycle air conditioners

Future preference of heater or heating system for likely home owners (%)

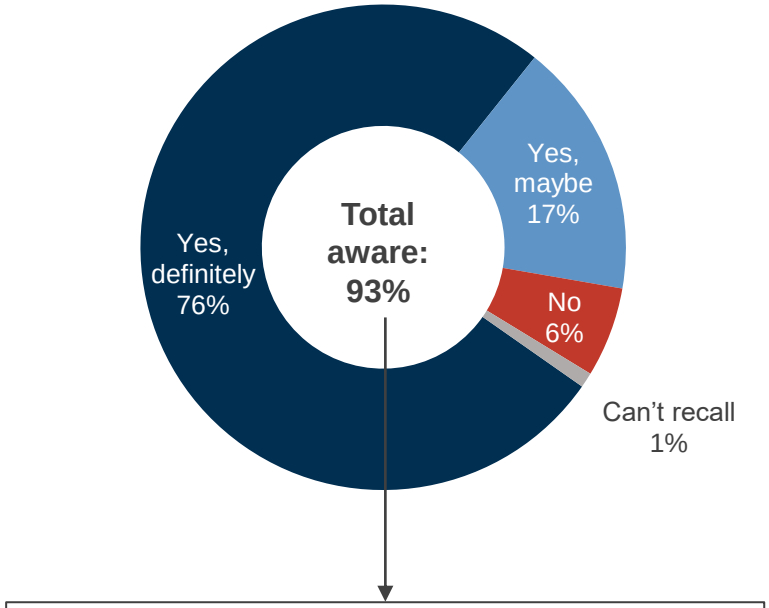


38% of likely home owners would prefer to use reverse cycle air conditioners (both heating and cooling) to heat their home. Gas ducted heating (heating only or with add-on cooling) is the preferred heating system for 15% of likely home owners.

Significantly higher / lower than the total at the 95% confidence interval.
Q16f. Again, thinking about your future home that you might own, what type of heater or heating system would you prefer to mostly use to heat your home…
Base: Likely home owners (n=500)

Nearly all current and likely home owners are aware most split system air conditioners can both heat and cool

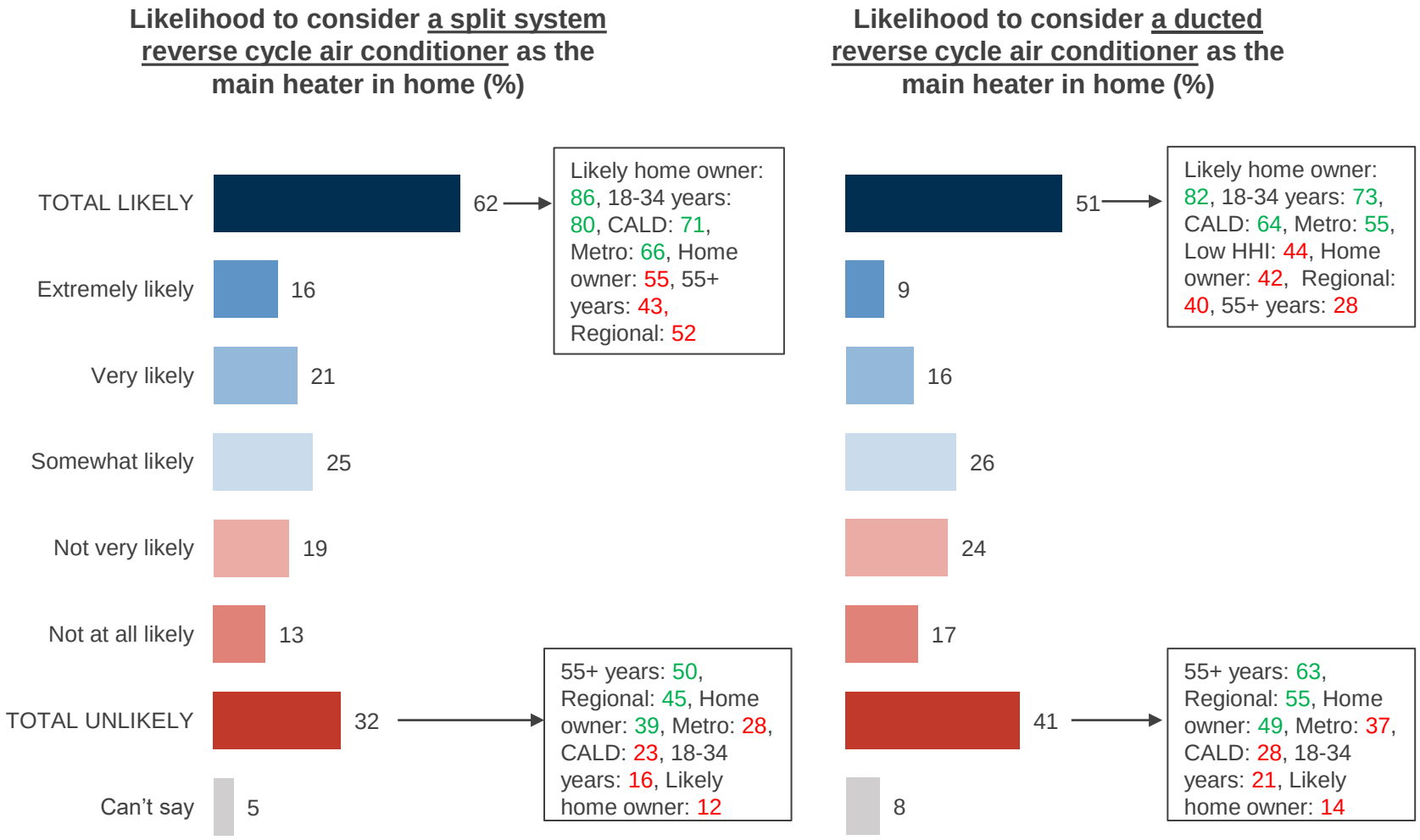
Awareness that most split system air conditioners can provide both heating and cooling for the home



93% of current and likely home owners are aware that most split system air conditioners can provide both heating and cooling for the home. This is *significantly different* among: 55+ years: 98, Regional: 97, 18-34 years: 89

Significantly higher / lower than the total at the 95% confidence interval.
Q17. Before today, were you aware that most split system air conditioners can provide both heating and cooling for the home?
Base: All respondents (n=2,000)

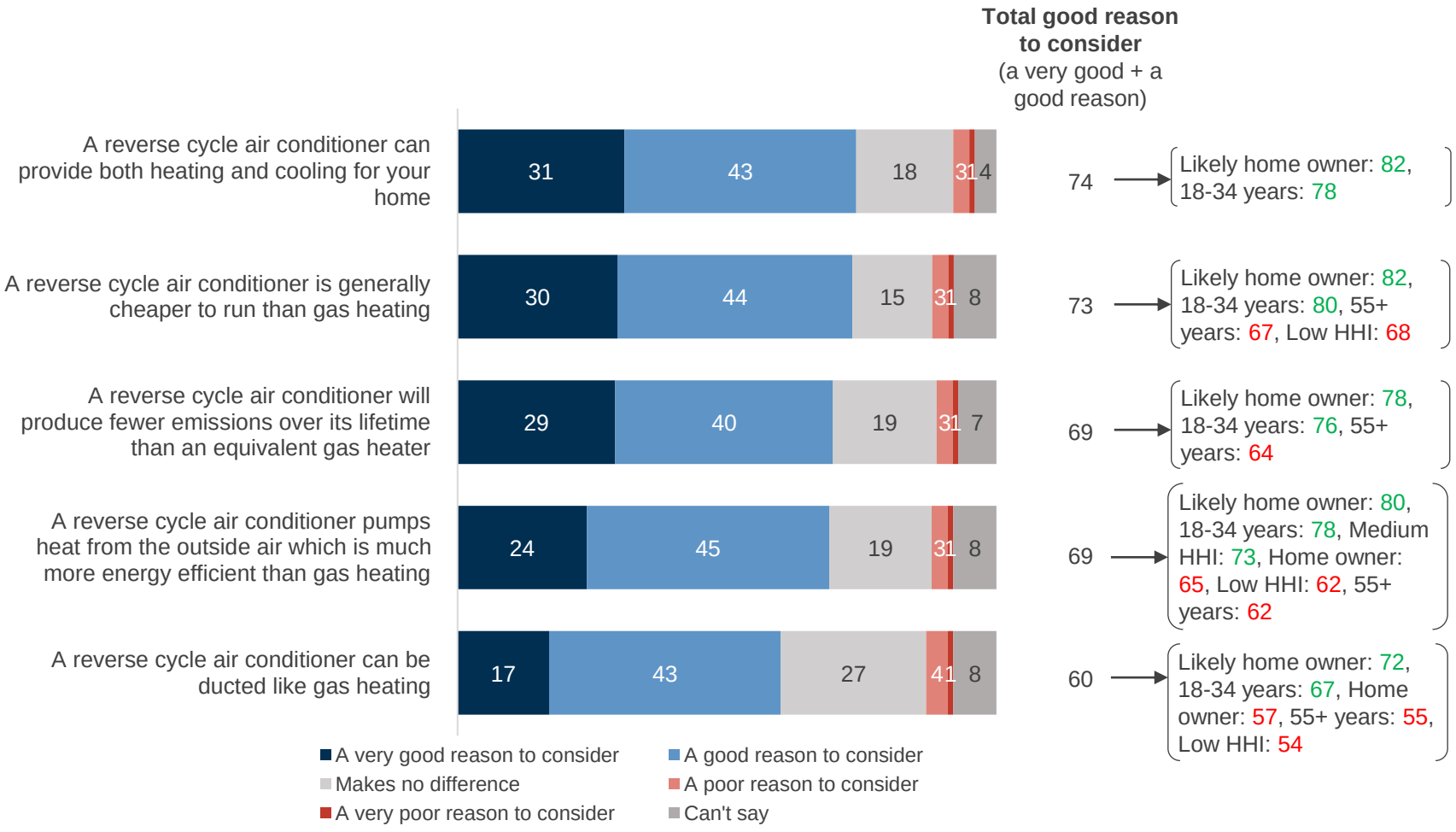
More home owners are likely to consider a split system over a ducted air conditioner as their main heater



Significantly higher / lower than the total at the 95% confidence interval.
Q18. How likely would you be to consider a split system reverse cycle air conditioner or an electric ducted reverse cycle air conditioner as the main heater for your home? Would you say…
Base: All respondents (n=2,000)

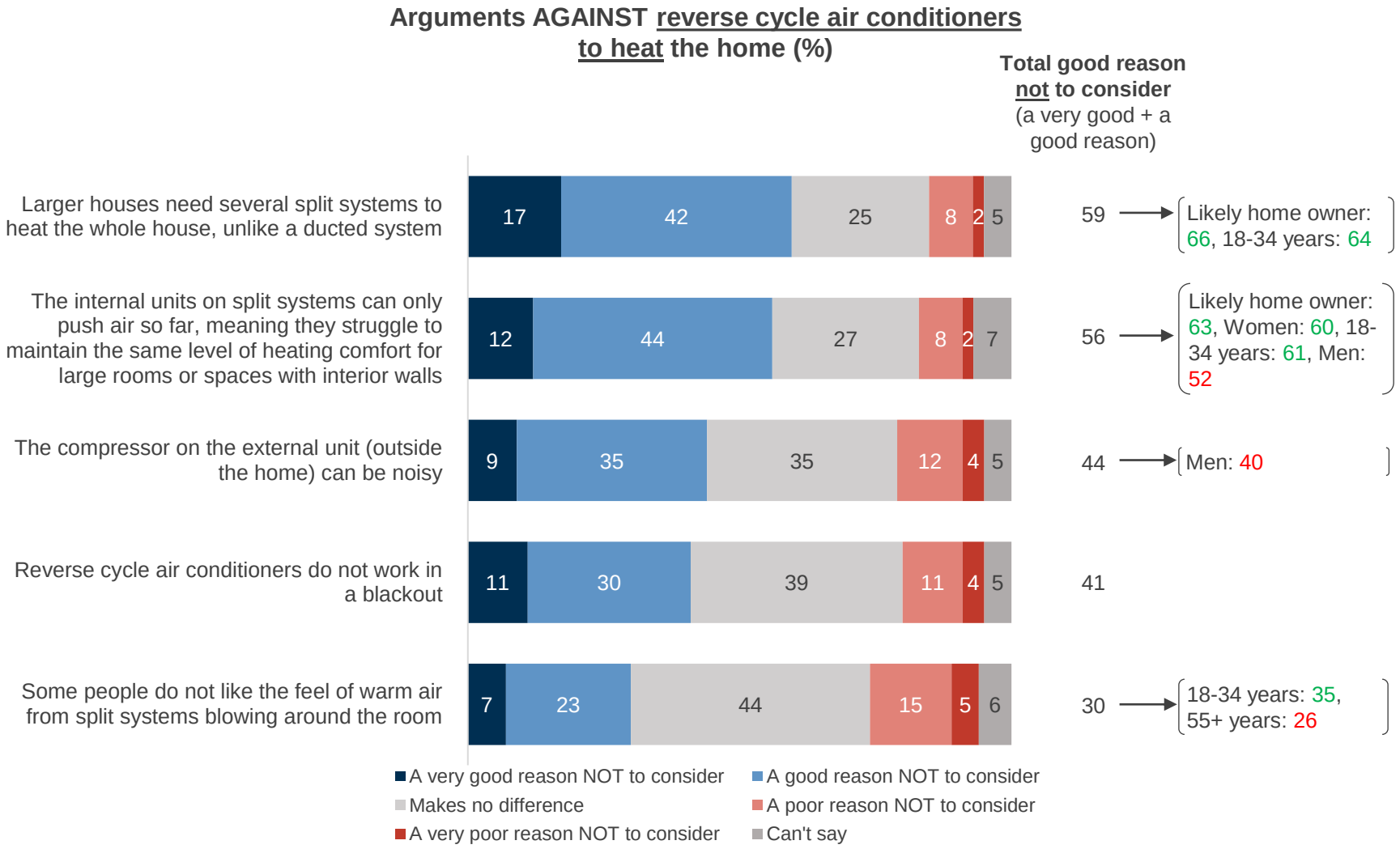
Ability to heat and cool and being cheaper to run are key arguments for reverse cycle air conditioners to heat homes

Arguments FOR reverse cycle air conditioners to heat the home (%)



Significantly higher / lower than the total at the 95% confidence interval.
Q19. Below are some arguments that are in favour of electric reverse cycle air conditioners to heat your home, both split systems and ducted reverse cycle air conditioners. To what extent do you think each statement is a good or a poor reason to consider using reverse cycle air conditioners to heat your home? If you already use a reverse cycle air conditioner for heating, please rate the statements on whether it is a good or poor reason to do so.
Base: All respondents (n=2,000)

Needing several systems and less heating comfort are key reasons against reverse cycle air conditioners for heating



Significantly higher / lower than the total at the 95% confidence interval.
Q20. Below are some arguments that have been made against using electric reverse cycle air conditioners to heat your home, including both split systems and ducted reverse cycle air conditioners. To what extent do you think each statement is a good or a poor reason to NOT consider using split system air conditioners to heat your home?
Base: All respondents (n=2,000)

‘Considered’ views explained

JWS Research’s Campaign Converter™ analysis shows how the likelihood of considering both a split system and (separately) a ducted reverse cycle air conditioner as the main heater in the home changes, following consideration of balanced messaging about these – namely arguments in support, and arguments against using reverse cycle air conditioners to heat the home.

The chart following shows that, prior to provision of any information, fewer than two in five respondents (37%) are ‘extremely’ or ‘very likely’ to consider a split system reverse cycle air conditioner as their main heater. A further 25% are ‘somewhat likely’, and just under a third (32%) are unlikely to consider a split system reverse cycle air conditioner as their main heater.

The results also show that a quarter of respondents (25%) are ‘extremely’ or ‘very likely’ to consider a ducted reverse cycle air conditioner as their main heater, and a similar proportion (26%) are ‘somewhat likely’ to do so. Just over two in five respondents (41%) are unlikely to consider a ducted reverse cycle air conditioner as their main heater.

Survey respondents were then provided arguments in favour, and others against, using reverse cycle air conditioners to heat homes.

What we see is that **the balanced messaging has a positive impact on likelihood to install a reverse cycle air conditioner as the main heater.**

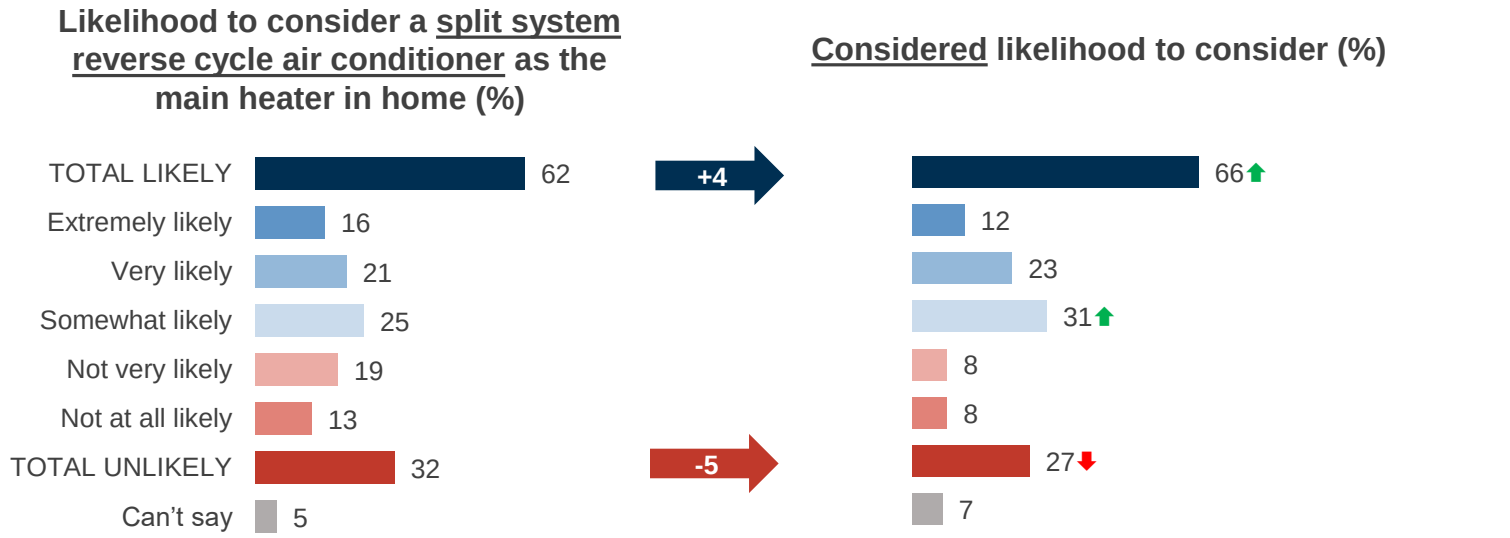
For **split system reverse cycle air conditioners**:

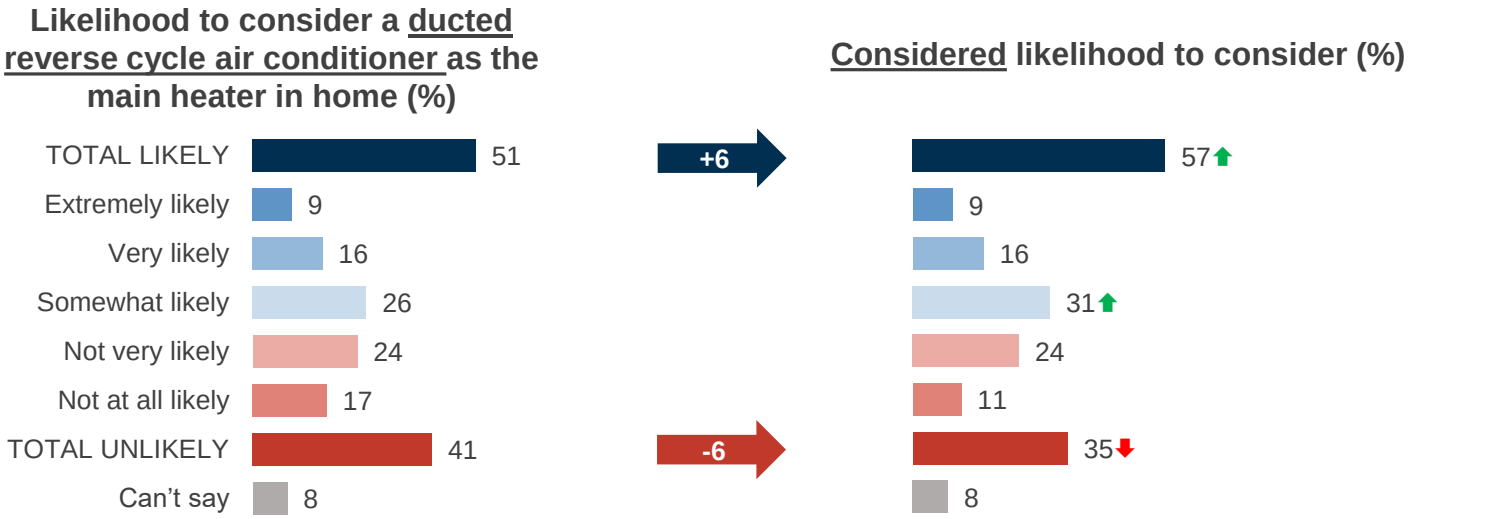
- More than a third of respondents (36%) are ‘extremely’ or ‘very likely’ to consider a split system reverse cycle air conditioner as their main heater (down from 37%). However, taking into account those who are *‘somewhat likely’*, total likelihood *increases significantly* from 62% to 66%.
- Further, just over a quarter of respondents (27%) are ‘not at all’ or ‘not very likely’ to consider a split system reverse cycle air conditioner as their main heater (a *significant decrease* from 32% initially).

For **ducted reverse cycle air conditioners**:

- A quarter of respondents (26%) are ‘extremely’ or ‘very likely’ to consider a ducted reverse cycle air conditioner as their main heater (up from 25%). Total likelihood (including ‘somewhat likely’) *increases significantly* from 51% to 57%.
- Further just over a third of respondents (35%) are unlikely to consider a ducted reverse cycle air conditioner as their main heater (a *significant decrease* from 41% initially).

Exposure to arguments has a small impact on consideration of reverse cycle air conditioners for heating





Q18. How likely would you be to consider a split system reverse cycle air conditioner or an electric ducted reverse cycle air conditioner as the main heater for your home? Would you say… / Q21. On consideration of the information, and thinking again about split system reverse cycle air conditioners and electric ducted reverse cycle air conditioning, how likely would you be to consider one of these as the main heating source for your home? Would you say…
Base: All respondents (n=2,000)
Significantly higher ⬆ / lower ⬇ than the initial measure at the 95% confidence interval.

Converter Analysis explained

The previous page demonstrates that at the total level there is an increase in likelihood to consider reverse cycle air conditioners as the main heater, following exposure to arguments about these.

Delving into the data at an individual respondent level provides further insight. The charts overleaf place survey respondents into categories to show how perceptions either change or stay the same between their 'initial' and 'considered' likelihood, post review of the arguments provided.

54% of respondents are 'always likely' to consider split system reverse cycle air conditioners as their main heater

44% of respondents are 'always likely' to consider a ducted reverse cycle air conditioner as their main heater

These respondents initially stated that they are 'extremely', 'very' or 'somewhat likely' to consider these types of air conditioners as their main heater. Then, following exposure to arguments for and against using reverse cycle air conditioners for heating, again are either 'extremely', 'very' or 'somewhat likely' to consider these types of air conditioners as their main heater (i.e. their considered likelihood).

There is a significantly higher incidence of being 'always likely' to consider reverse cycle air conditioners as the main heater among 18 to 34 year olds, people from CALD backgrounds and those with a high household income.

For split system reverse cycle air conditioners, 25% of respondents are 'positive converters'

For ducted reverse cycle air conditioners, 28% of respondents are 'positive converters'

These are the people who, irrespective of their likelihood to consider these types of air conditioners as their main heater, are more likely to do so after considering the information (i.e. they move up the scale). For example, a respondent might be 'not very likely' to consider these types of air conditioners as their main heater initially, and the arguments gave that person reason to now feel 'somewhat likely' to consider them as their main heater.

Another respondent may feel 'somewhat likely' to consider these types of air conditioners as their main heater initially, and on consideration of the arguments, now feels 'very likely'. These people are described as positive converters as they have moved up the scale, however they also fall into the 'always likely' category as well.

Converter Analysis explained (cont'd)

For split system reverse cycle air conditioners, there is a higher incidence of 'positive converters' among people aged 55+ years.

For ducted reverse cycle air conditioners, there is a higher incidence of 'positive converters' among people in regional areas.

For split system reverse cycle air conditioners, 21% of respondents are 'negative converters'

For ducted reverse cycle air conditioners, 19% are 'negative converters'

'Negative converters' are those who move down the likelihood scale after considering the arguments provided. There is a higher incidence of 'negative converters' among home owners and people aged 55+ years.

For split system reverse cycle air conditioners, there is also a higher incidence of 'negative converters' among those in regional areas.

For ducted reverse cycle air conditioners, there is also a higher incidence of 'negative converters' among those with low household incomes.

Positive converters are balanced out by negative converters after consideration of information

Converter analysis shows the movement in claimed likelihood to consider **a split system reverse cycle air conditioner** as the main heater following exposure to balanced messaging (i.e. arguments for and against).

Positive Converters 25%
post exposure to messaging, move **up** the rating scale to a higher likelihood to consider a split system reverse cycle air conditioner as the main heater.

Always likely
54% are always likely to consider a split system reverse cycle air conditioner as the main heater

Extremely likely
Very likely
Somewhat likely

Always unlikely
20% are always unlikely to consider a split system reverse cycle air conditioner as the main heater

Not at all likely
Not very likely

Negative Converters 21%
post exposure to messaging, move **down** the rating scale to a lower likelihood to consider a split system reverse cycle air conditioner as the main heater.

Note: Converter analysis categories are not mutually exclusive, therefore the percentages add to more than 100%.

There are more positive converters than negative converters after consideration of balanced information

Converter analysis shows the movement in claimed likelihood to consider **a ducted reverse cycle air conditioner** as the main heater following exposure to balanced messaging (i.e. arguments for and against).

Positive Converters 28%
post exposure to messaging, move **up** the rating scale to a higher likelihood to consider a ducted reverse cycle air conditioner as the main heater.

Always likely
44% are always likely to consider a ducted reverse cycle air conditioner as the main heater

Extremely likely
Very likely
Somewhat likely

Always unlikely
28% are always unlikely to consider a ducted reverse cycle air conditioner as the main heater

Not at all likely
Not very likely

Negative Converters 19%
post exposure to messaging, move **down** the rating scale to a lower likelihood to consider a ducted reverse cycle air conditioner as the main heater.

Note: Converter analysis categories are not mutually exclusive, therefore the percentages add to more than 100%.

A higher incidence of positive conversion among those aged 55+ years and those in regional locations

Positive Converters:

Split system (25%)
Ducted (28%)

In relation to considering a **split system reverse cycle air conditioner as the main heater**, there is:

- **A *higher incidence* of positive converters among people aged 55+ years** (29%).

In relation to considering a **ducted reverse cycle air conditioner as the main heater**, there is:

- **A *higher incidence* of positive converters among people living in regional areas** (34%).

For **both air conditioner types**, they are as likely as the population on average to agree with arguments both in favour and against using reverse cycle air conditioners to heat homes.

Always likely:

Split system (54%)
Ducted (44%)

There is **a *higher incidence* of always being likely to consider a split system reverse cycle air conditioner as the main heater** among:

- **Likely home owners** (77%), **18 to 34 year olds** (73%), people from **CALD backgrounds** (66%), and those with **high household incomes** (59%).

There is **a *higher incidence* among the same cohorts of always being likely to consider a ducted reverse cycle air conditioner as the main heater**:

- **Likely home owners** (73%), **18 to 34 year olds** (66%), people from **CALD backgrounds** (57%), and those with **high household incomes** (50%).

For both air conditioner types, those who are 'always likely' are swayed more by the arguments in favour of using reverse cycle air conditioners to heat homes. They are:

- **Significantly *more likely* than average to agree with the arguments in favour of using reverse cycle air conditioners to heat homes.**
- Significantly *less likely* than average to agree with the argument that 'larger houses need several split systems to heat the whole house, unlike a ducted system' is a reason not to consider these.

A quarter of home owners are not swayed by the arguments and remain 'unlikely' to consider

Negative Converters: Split system (21%) Ducted (19%)

There is **a *higher incidence* of negative converters among likely home owners** for both air conditioner types:

- Split system reverse cycle air conditioner (26%)
- Ducted reverse cycle air conditioner (24%).

Negative converters are more likely than average to already have ducted reverse cycle air conditioner (cools and heats the whole house).

For **both air conditioner types**, negative converters do not differ significantly in their view from the population on average in regard to the arguments for and against reverse cycle air conditioners to heat homes.

Always unlikely: Split system (20%) Ducted (28%)

There is **a *higher incidence* of always being unlikely to consider a split system reverse cycle air conditioner as the main heater** among:

- **Home owners** (24%), **people aged 55+ years** (34%) and those in **regional areas** (29%).

There is **a higher incidence of always being unlikely to consider a ducted reverse cycle air conditioner as the main heater** among:

- **Home owners** (35%), **people aged 55+ years** (48%), those in **regional areas** (38%) and those with **low household incomes** (36%).

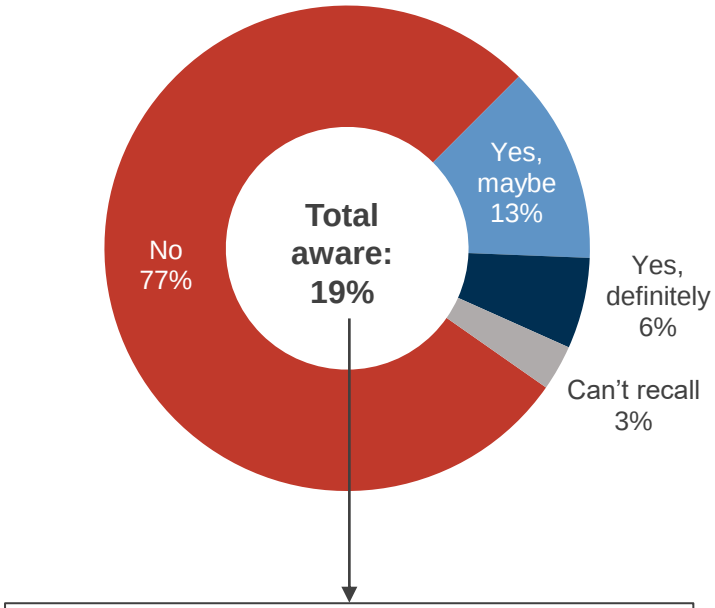
Those who are 'always unlikely' are more convinced by arguments against using reverse cycle air conditioners to heat homes.

For **both air conditioner types**, they are:

- **Significantly *more likely* than average to agree with arguments against using reverse cycle air conditioners to heat homes.**
- Significantly *less likely* than average to agree with the arguments in favour of using reverse cycle air conditioners to heat homes.

Vast majority of home owners are not aware of the Home Heating and Cooling Upgrades Program

Awareness of the Victorian Government's Home Heating and Cooling Upgrades Program

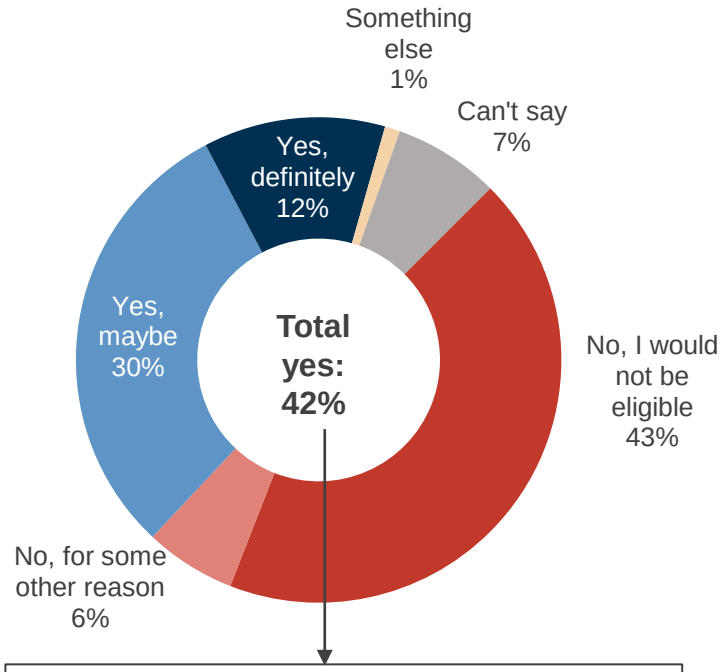


19% of home owners are aware of the Victorian Government's Home Heating and Cooling Upgrades Program. This is *significantly different* among:
18-34 years: 26, Men: 24, Women: 15, 55+ years: 15

Significantly higher / lower than the total at the 95% confidence interval.
Q22. The Victorian Government's Home Heating and Cooling Upgrades Program offers rebates to eligible households to replace gas or wood heaters with a split system reverse cycle air conditioner. Before today, were you aware of this program?
Base: Home owners (n=1,500)

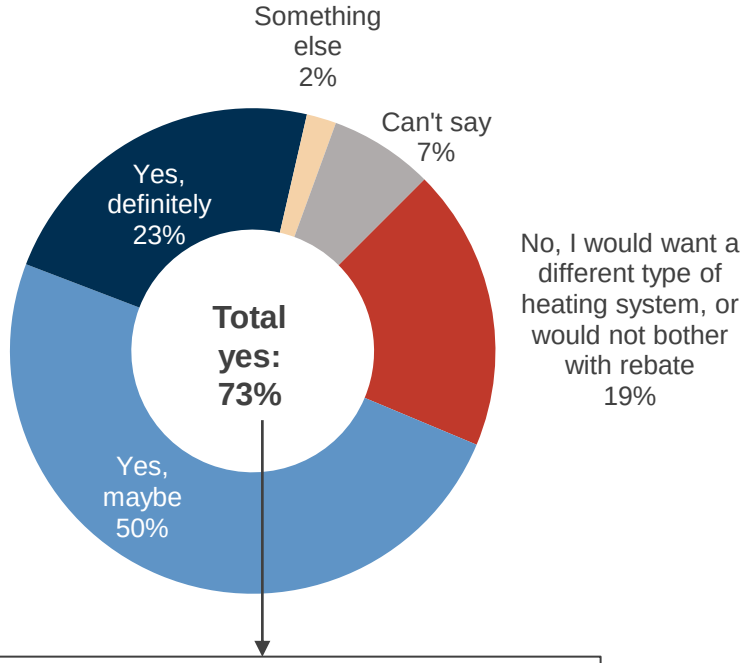
Removal of rebate eligibility criteria increases likelihood of installing a split system air conditioner

Likelihood to install a split system air conditioner if rebate available (%)
(among those with inefficient heating)



42% of home owners who have inefficient heating are likely to install a split system air conditioner for heating their home after hearing about the rebate.
This is *significantly different* among:
55+ years: 54, 35-54 years: 29, High HHI: 16

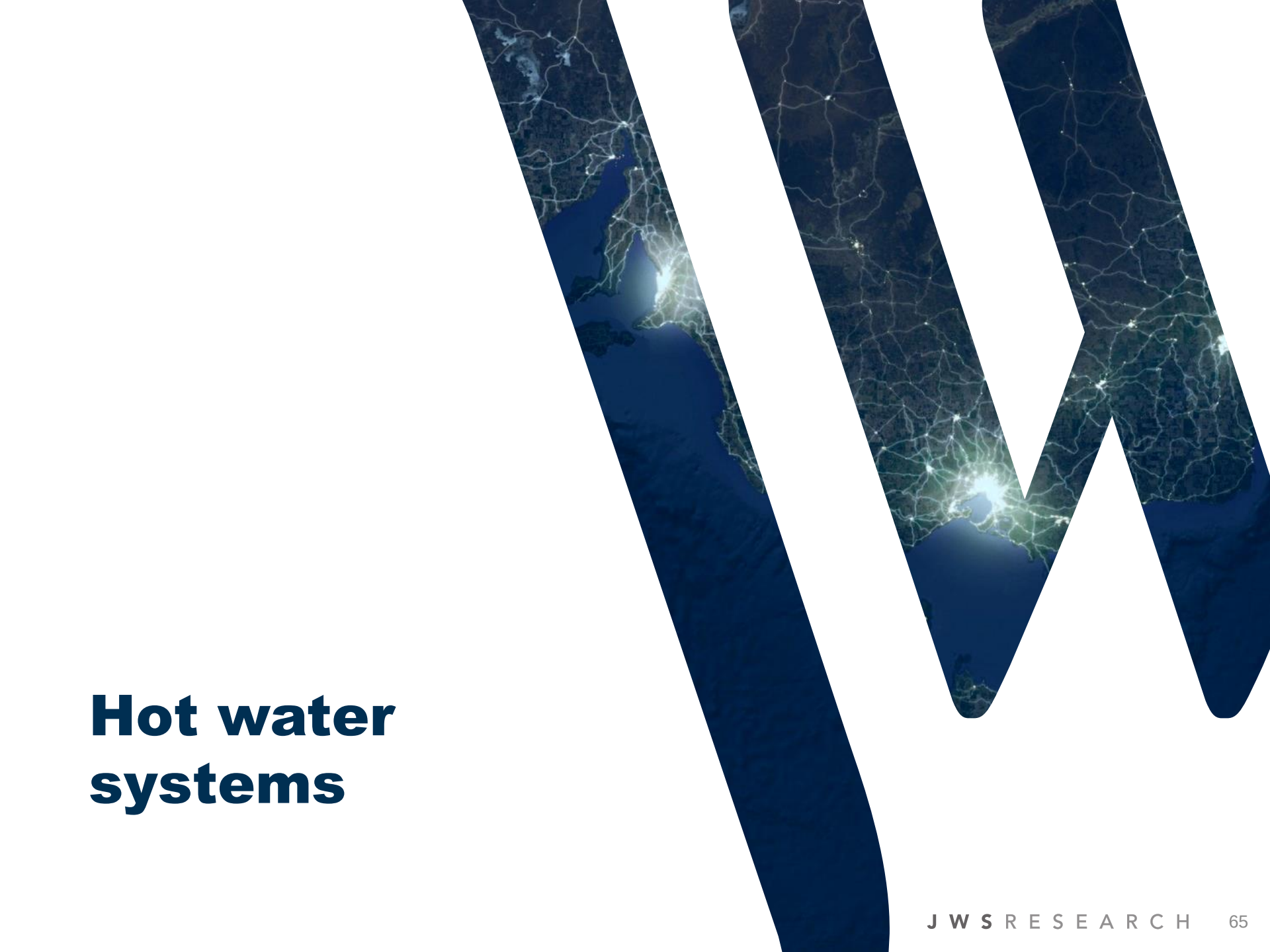
Likelihood to install a split system air conditioner if rebate eligibility criteria for rebate removed (%)
(among those not eligible)



73% of home owners not eligible for the rebate are likely to install a split system air conditioner to heat their home if a rebate was made available to them.
This is *significantly different* among:
18-34 years: 86, 55+ years: 60

Significantly higher / lower than the total at the 95% confidence interval.
Q23. To be eligible for the Home Heating and Cooling Upgrades Program, households must either: Have a concession card or have a household income of less than $90,000. Does the availability of this rebate make you more likely to install a split system air conditioner to heat your home if you were to replace your heating system? / Q23a. If the eligibility criteria were removed, would the availability of a rebate make you more likely to install a split system reverse cycle air conditioner if you were to replace your heating system?
Base: Home owners who have gas heating, wood heaters or inefficient electric heaters (n=911); home owners not eligible for rebate (n=392)

Hot water systems



Section summary – Hot water systems

Despite prevalence of gas hot water systems, alternatives are being considered

More than three in five home owners have gas (storage or instantaneous) hot water systems. The incidence of electric storage and solar is markedly lower, and near-negligible for heat pumps. However, there is evidence of a shift away from gas, with over a quarter of home owners intending to install solar hot water in the next two years, and over one in ten intending to install a heat pump water heater.

Arguments *for* heat pump water heaters are more persuasive

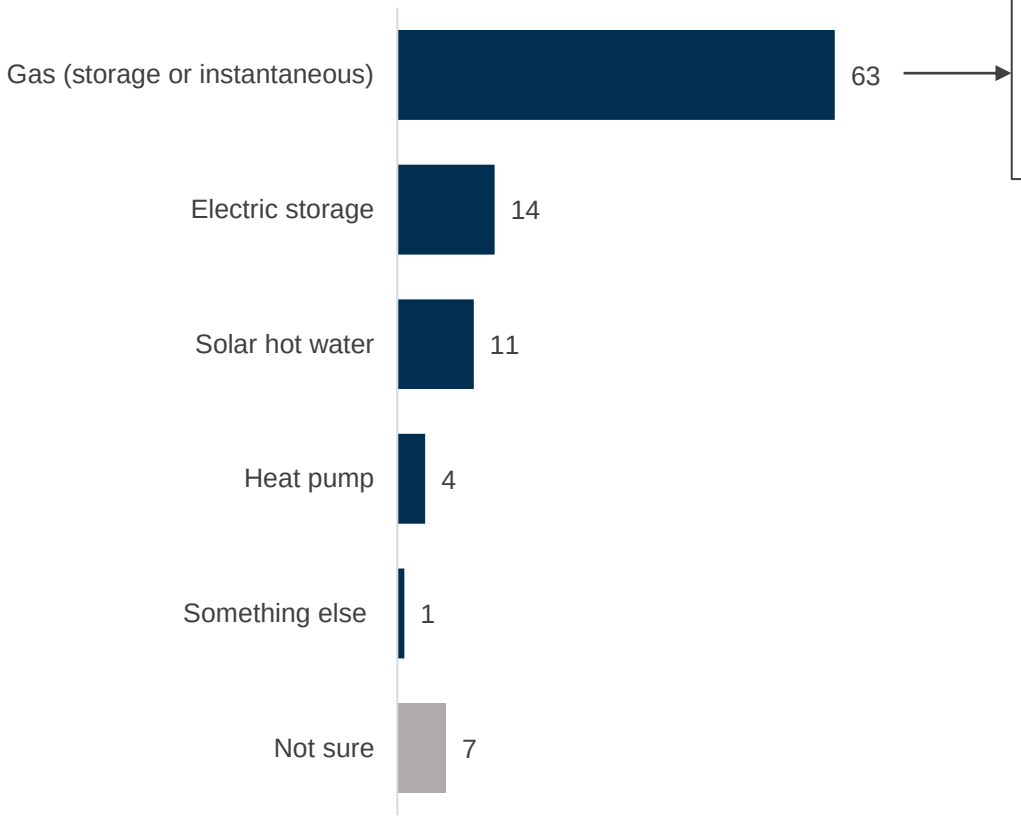
Most people know little, if anything, about heat pump water heaters. Arguments for heat pump water heaters have greater resonance than those against. Likely home owners and those on higher household incomes are significantly more likely than average to find the arguments convincing. Lower running costs and improved energy efficiency are arguments with stronger traction.

Messaging has a mixed impact on consideration of heat pump water heaters

Following consideration of balanced arguments, those who had an unformed opinion ('can't say') are divided in their shift toward to being 'likely' and 'unlikely' to consider heat pump water heaters. Despite this, there is a *significant* increase in the proportion who are likely to consider heat pump water heaters. Increased likelihood to consider comes from likely home owners and the 18 to 34 year olds.

Most home owners have gas hot water systems in their homes

Type of water system in home (%)

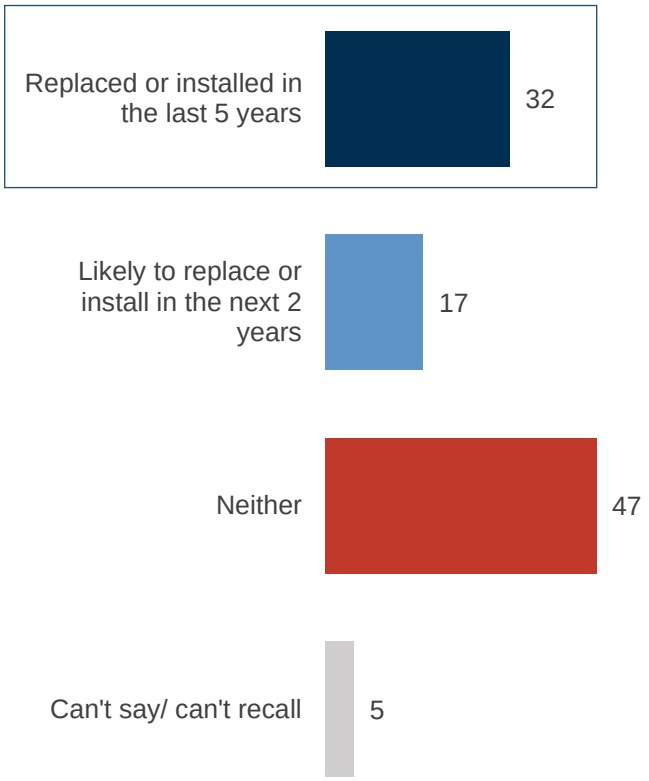


63% of home owners have a gas (storage or instantaneous) hot water system in their home. This is *significantly different* among:
55+ years: 70, 18-34 years: 47

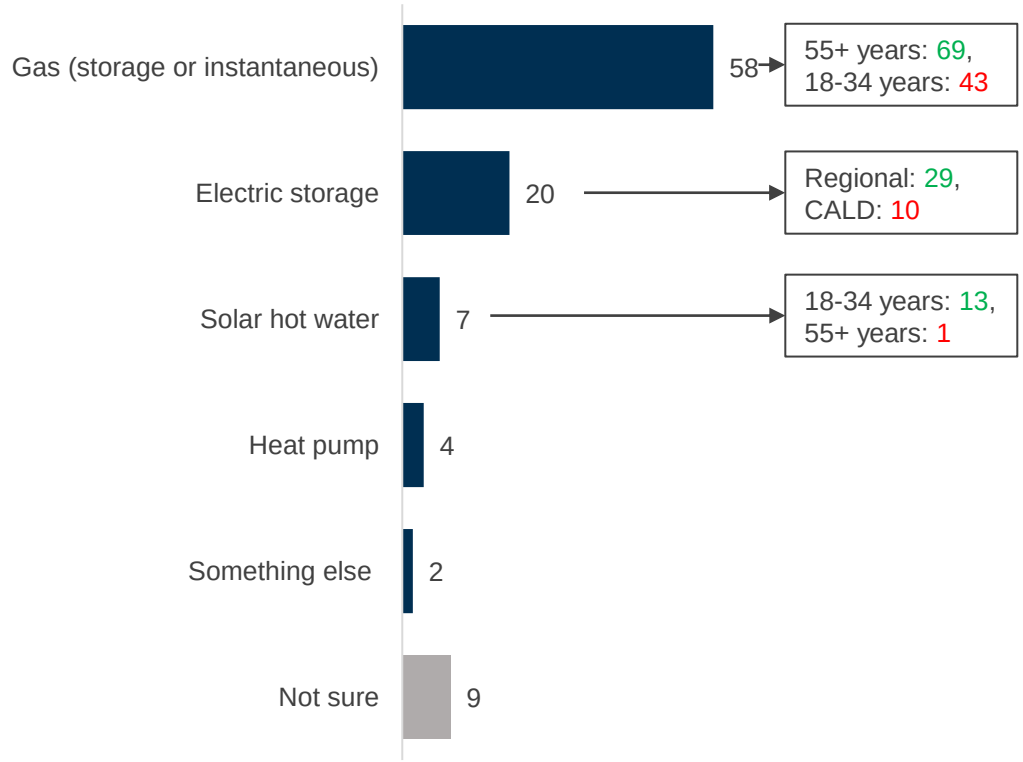
Significantly higher / lower than the total at the 95% confidence interval.
Q24. What type of hot water system do you have in your home …
Base: Home owners (n=1,500)

Gas hot water systems have most frequently been replaced

Installation of hot water system (%)
(multiple response)



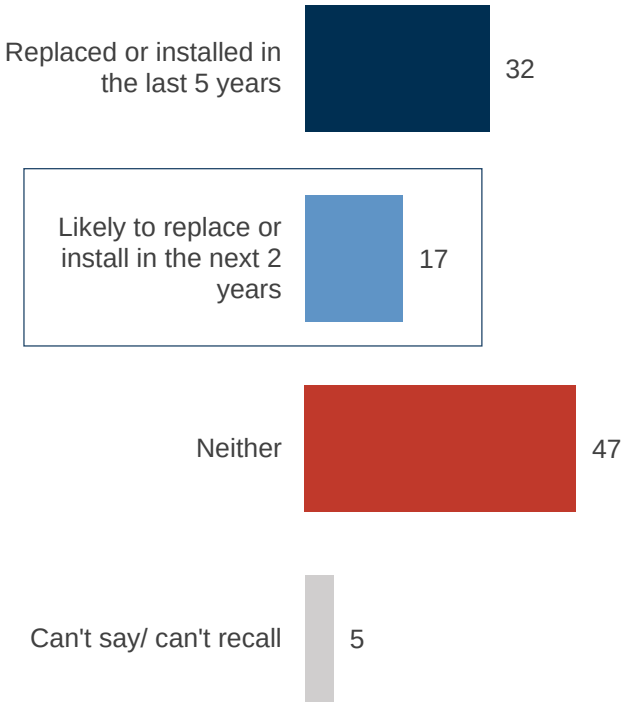
Type of hot water system replaced in home in the last five years (%)
(among those who replaced a hot water system)



Significantly higher / lower than the total at the 95% confidence interval.
Q3. Which of the following items have you replaced or installed in your current home in the last 5 years, or do you plan to replace or install in the next 2 years? Select all that apply / Q25. Was your old hot water system, the one that you replaced most recently in your home…
Base: Home owners (n=1,500); home owners who had a hot water system replaced in the last five years (n=475)

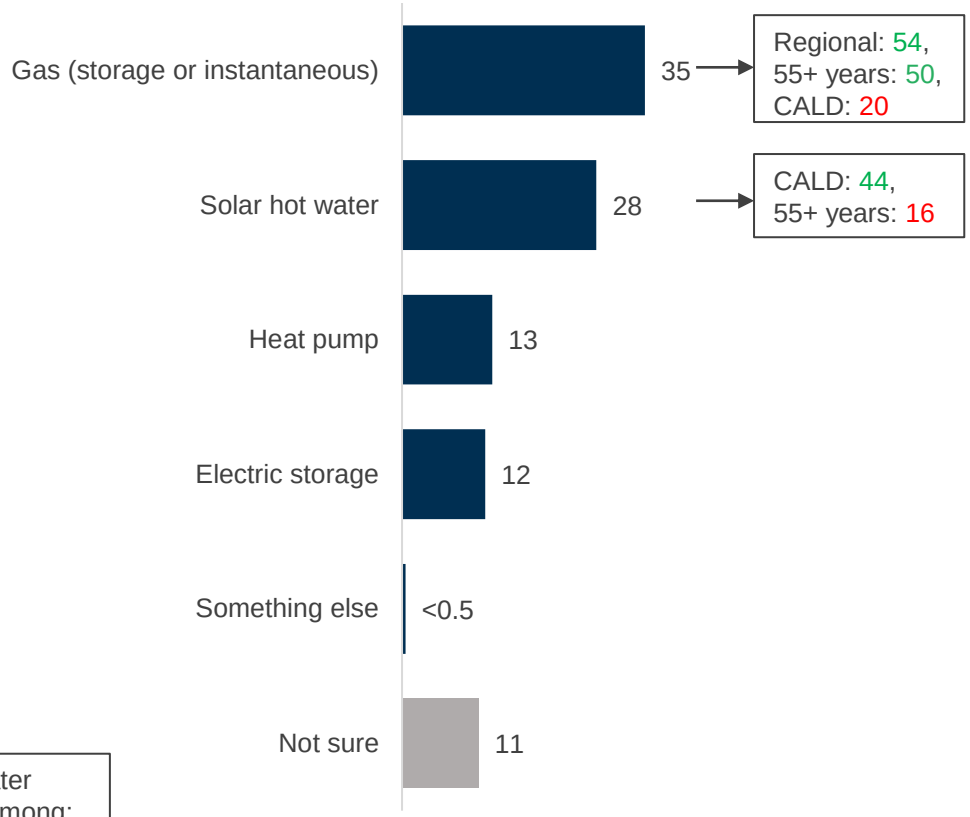
There is some intention to move away from gas hot water systems when these are replaced

Installation of hot water system (%)
(multiple response)



17% of home owners are likely to replace or install a hot water system in the next two years. This is *significantly different* among: 18-34 years: 22, 35-54 years: 21, High HHI: 21, 55+ years: 11

Type of new hot water system intending to install in the next two years (%)
(among those intending to replace a hot water system)



Significantly higher / lower than the total at the 95% confidence interval.
Q3. Which of the following items have you replaced or installed in your current home in the last 5 years, or do you plan to replace or install in the next 2 years? Select all that apply / Q26. When you replace your hot water system, what type of hot water system do you intend to install in your home…
Base: Home owners (n=1,500); home owners likely to replace hot water system in the next two years (n=252)

Most home owners tend to switch their hot water systems 'like for like'

32% of home owners replaced or installed a hot water system in the last five years

	Type of hot water system replaced			
	Gas (n=275)	Electric storage (n=91)	Solar hot water (n=35)	Heat pump (n=17)
% of home owners <u>had</u> this hot water system (among those who had replaced):	58%	20%	7%	4%
Current hot water system				
Gas	89	26	27	27
Electric storage	2	57	18	24
Solar hot water	4	9	52	5
Heat pump	2	7	3	44

Of the 32% of home owners that installed a hot water system, 58% had a gas hot water system. Most of these home owners (89%) replaced their gas cooktop like for like with an even spread across solar hot water (4%), electric storage (2%) and heat pump hot water systems (2%).

17% of home owners are likely to replace or install a hot water system in the next two years

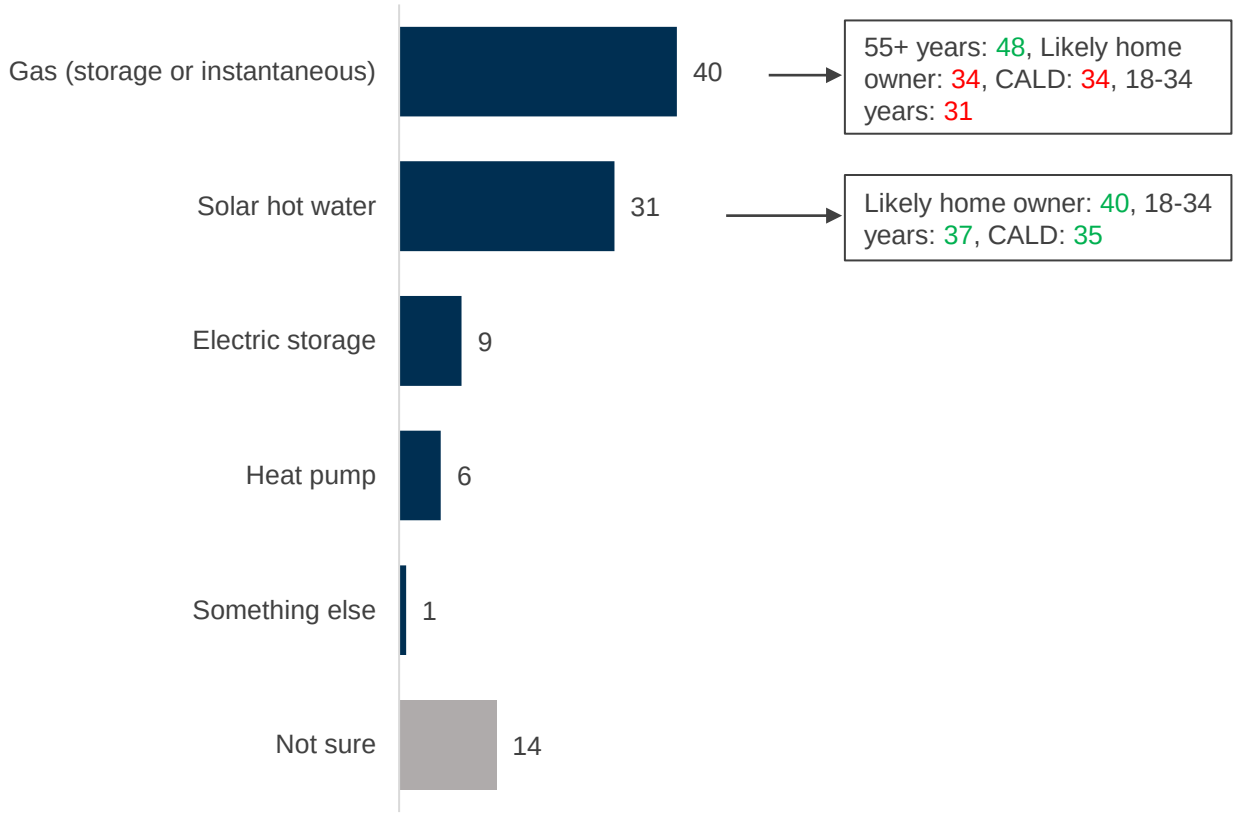
	Type of hot water system in home			
	Gas (n=136)	Electric storage (n=52)	Solar hot water (n=30)	Heat pump (n=18)
% of home owners <u>have</u> this hot water system (among those likely to install):	55%	21%	11%	7%
Hot water system likely to install				
Gas	50	17	17	19
Electric storage	5	28	20	16
Solar hot water	25	27	45	30
Heat pump	9	21	15	31

Of the 17% of home owners that are planning to replace or install a hot water system, 55% have a gas hot water system. Half of these home owners (50%) expect to replace this like for like. One in four (25%) are likely to install a solar hot water system to replace their gas hot water system.

Q3. Which of the following items have you replaced or installed in your current home in the last 5 years, or do you plan to replace or install in the next 2 years? Select all that apply / Q24. What type of hot water system do you have in your home … / Q25. Was your old hot water system, the one that you replaced most recently in your home… / Q26. When you replace your hot water system, what type of hot water system do you intend to install in your home…
Base: home owners who had a hot water system replaced in the last five years (n=475); home owners likely to replace hot water system in the next two years (n=252)

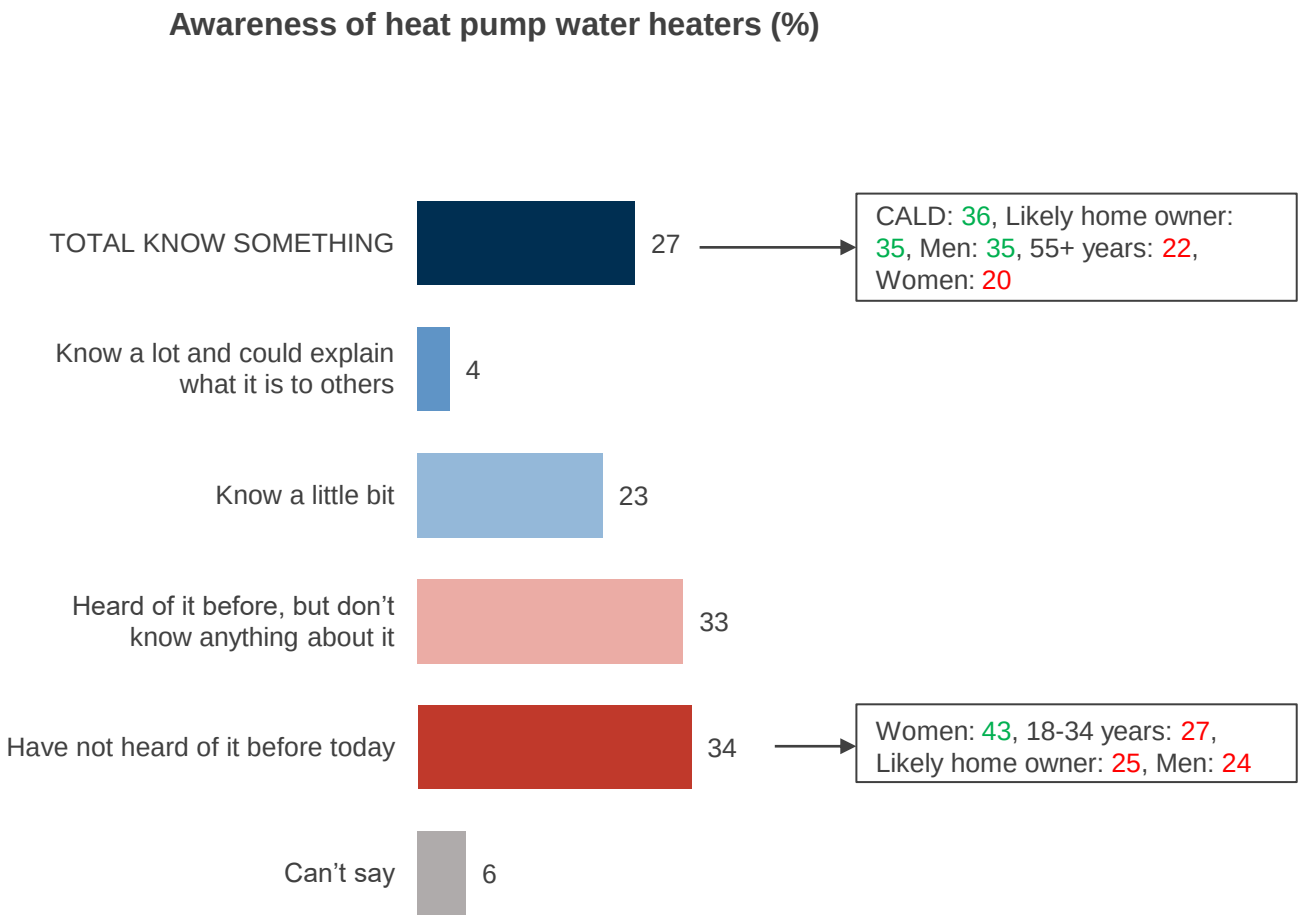
Preferences are divided between gas and solar hot water systems, with a leaning for gas evident

Preferred type of hot water system (%)



Significantly higher / lower than the total at the 95% confidence interval.
Q27. What type of hot water system would you most prefer to have in your home, would it be a…
Base: All respondents (n=2,000)

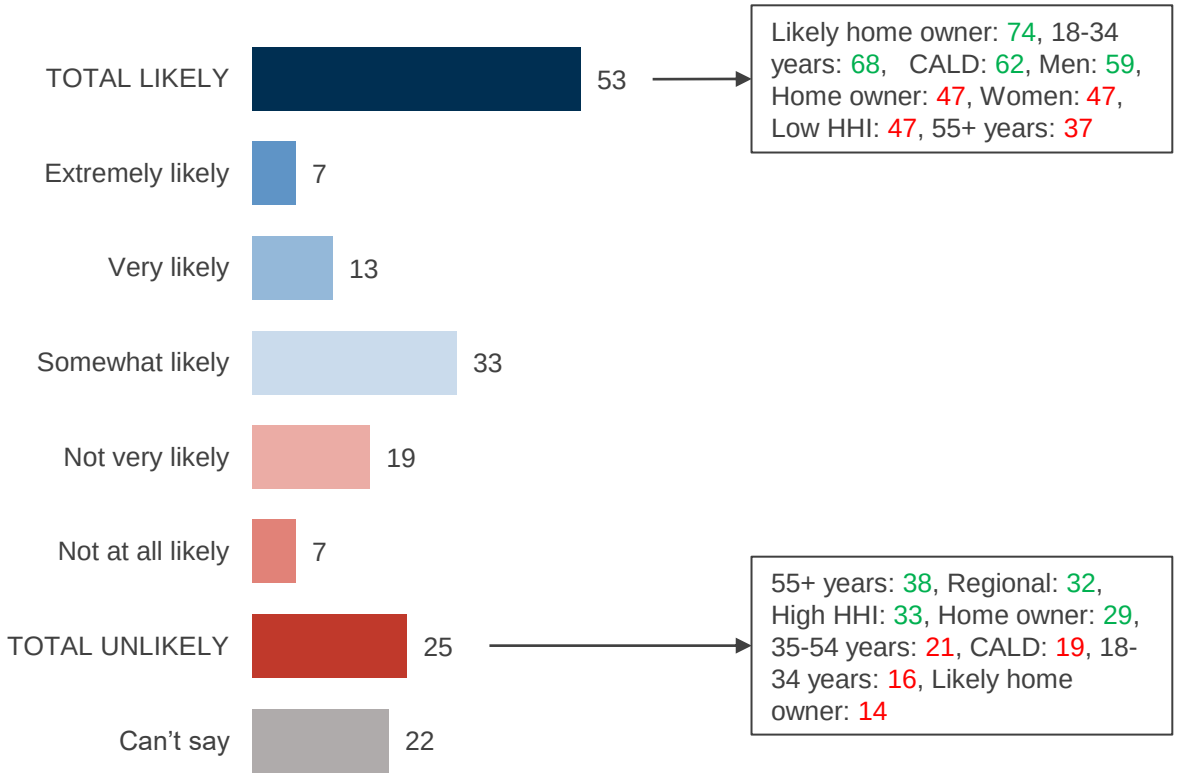
Most current and likely home owners do not know much, if anything, about heat pump water heaters



Significantly higher / lower than the total at the 95% confidence interval.
Q28. How much would you say you know about heat pump water heaters. Would you say you…
Base: All respondents (n=2,000)

More than half of home owners and likely home owners are likely to consider heat pump water heaters

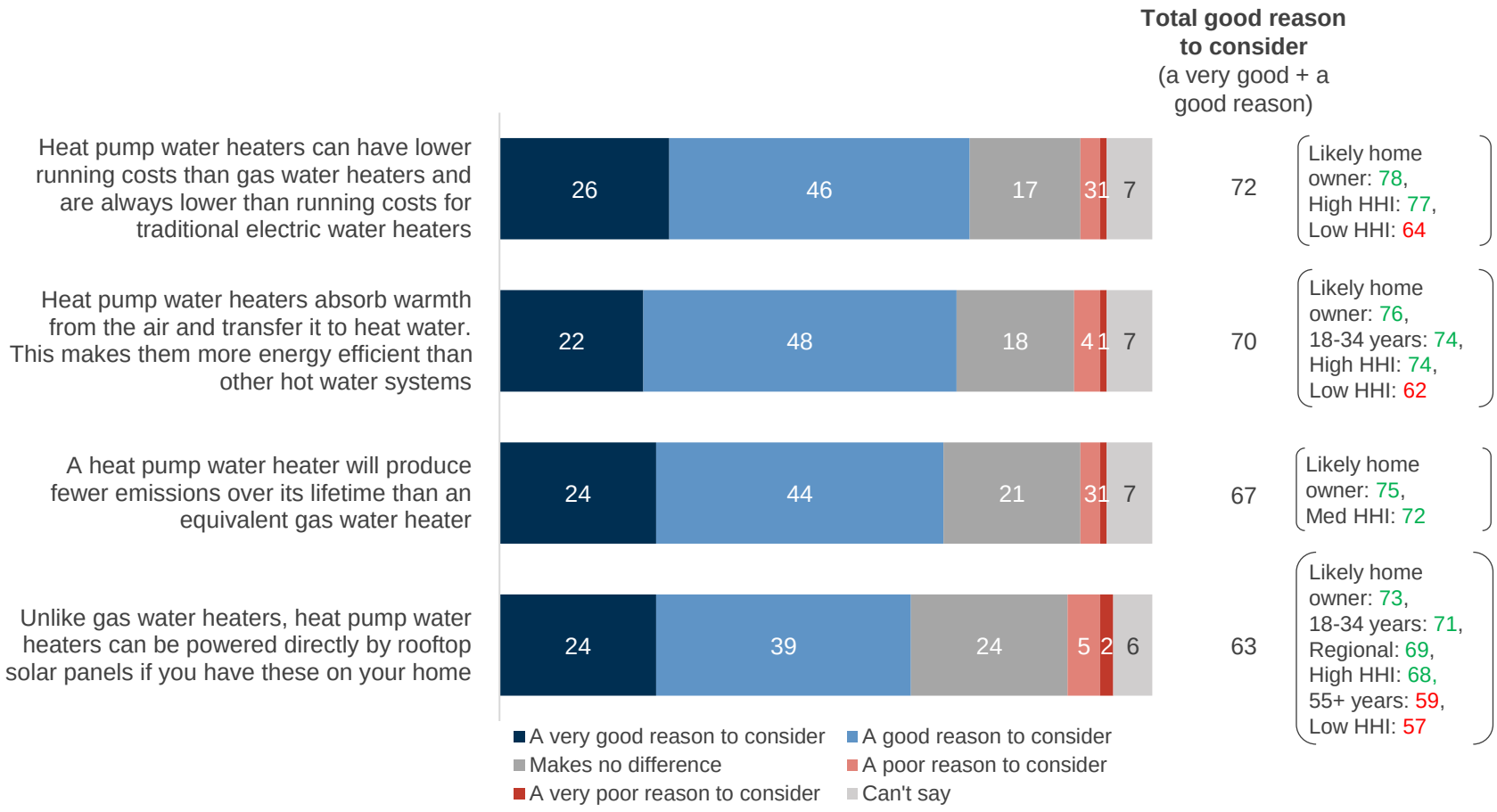
Likelihood to consider heat pump water heater if replacing hot water system (%)



Significantly higher / lower than the total at the 95% confidence interval.
Q29. If you were to replace your hot water system, how likely would you be to consider a heat pump water heater for your home?
Base: All respondents (n=2,000)

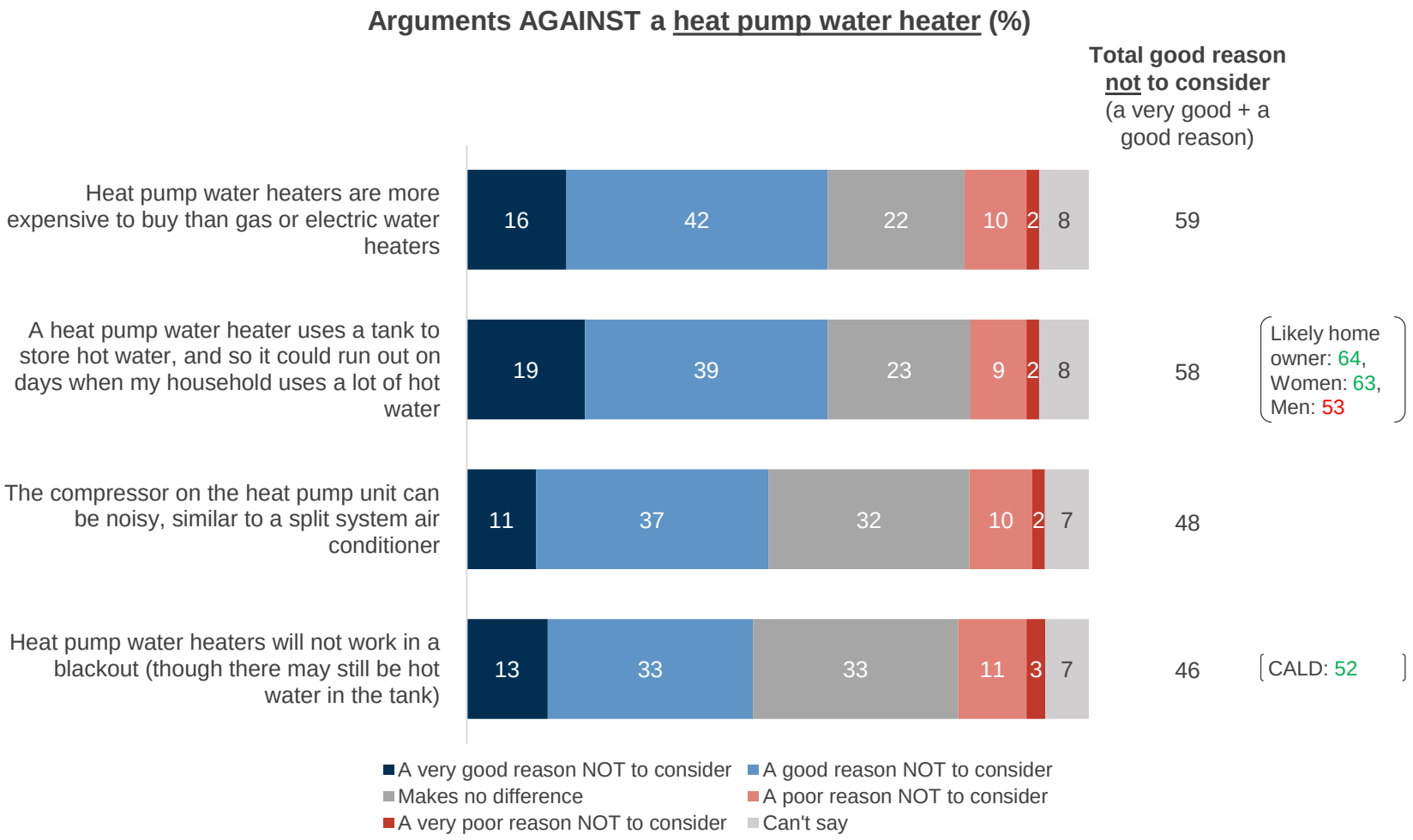
Arguments for heat pumps are more persuasive to likely home owners and those on higher household incomes

Arguments FOR a heat pump water heater (%)



Significantly higher / lower than the total at the 95% confidence interval.
Q30. Below are some arguments that are in favour of heat pump water heaters. In the next question, we will show you some arguments against heat pump water heaters. To what extent do you think each statement is a good or a poor reason to consider installing a heat pump water heater in your home? If you already have a heat pump water heater, please rate the statements on whether it is a good or poor reason to have a heat pump water heater.
Base: All respondents (n=2,000)

There are some concerns evident about purchase costs and running out of hot water



Significantly higher / lower than the total at the 95% confidence interval.
Q31. Below are some arguments that have been made against heat pump water heaters. In the next question, we will show you some arguments in favour of heat pump water heaters. To what extent do you think each statement is a good or a poor reason to NOT consider installing a heat pump water heater in your home? If you already have a heat pump water heater, please rate the statements on whether it is a good or poor reason NOT to have a heat pump water heater.
Base: All respondents (n=2,000)

‘Considered’ views explained

JWS Research’s Campaign Converter™ analysis shows how the likelihood of considering a heat pump water heater in the home changes following consideration of balanced messaging about these – namely arguments in support, and arguments against, heat pump water heaters.

At the start of the section on hot water systems in the survey, respondents were asked their likelihood to consider a heat pump water heater for their home (likely home owners were asked to think about the home they might own, and people who already have a heat pump water heater were asked if they would consider installing one again). This is called the ‘initial likelihood’ to consider a heat pump water heater (Q29). The chart overleaf shows that, prior to provision of any information, one in five respondents (20%) are ‘extremely’ or ‘very likely’ to consider a heat pump water heater; a further 33% are ‘somewhat likely’. A quarter of respondents (25%) are unlikely to consider a heat pump water heater (with the remaining 22% unsure).

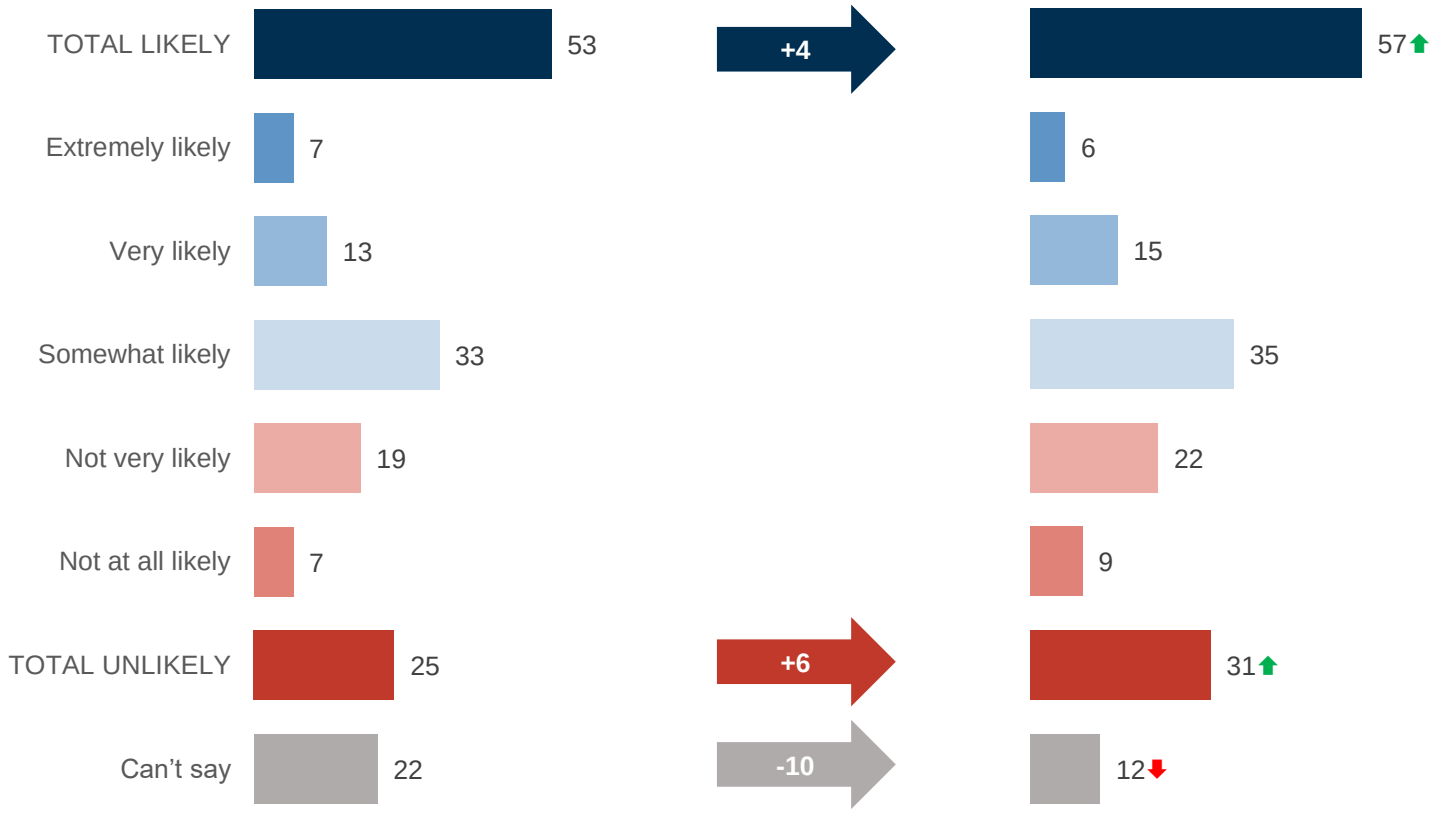
Survey respondents were then provided with balanced messaging about heat pump water heaters – arguments in favour of heat pump water heaters, and others against heat pump water heaters – and asked the extent to which each argument is a ‘good’ or ‘poor’ reason to consider a heat pump water heater.

Respondents were then again asked their likelihood to consider a heat pump water heater for their home, being their ‘considered likelihood’ (Q32).

What we see is that **the balanced messaging about heat pump water heaters does not significantly impact likelihood to consider heat pump water heaters at the total level.**

- **Rather, there is a shift from having an unformed opinion** (‘can’t say’) **into being ‘unlikely’ to consider heat pump water heaters.** Just over three in 10 respondents (31%) are ‘not at all’ or ‘not very likely’ to consider a heat pump water heater (a *significant increase* from 25% initially).

Exposure to arguments has a mixed impact on consideration of heat pump water heaters



Q29. If you were to replace your hot water system, how likely would you be to consider a heat pump water heater for your home?
Q32. On consideration of the information, and thinking again about if you were to replace your hot water system, how likely would you be to consider a heat pump water heater for your home? Would you say you…
Base: All respondents (n=2,000)
Significantly higher ⬆ / lower ⬇ than the initial measure at the 95% confidence interval.

Converter Analysis explained

The previous page demonstrates that at the total level there is a small increase in likelihood to consider a heat pump water heater in the home following exposure to arguments about these.

Delving into the data at an individual respondent level provides further insight. The chart overleaf places survey respondents into categories to show how perceptions either change or stay the same between their 'initial' and 'considered' likelihood, post review of the arguments provided.

45% of respondents are 'always likely' to consider heat pump water heaters

These respondents initially stated that they are 'extremely', 'very' or 'somewhat likely' to consider a heat pump water heater. Then, following exposure to arguments for and against heat pump water heaters, again are either 'extremely', 'very' or 'somewhat likely' to consider a heat pump water heater (i.e. their considered likelihood).

There is a significantly higher incidence of being 'always likely' to consider heat pump water heaters among 18 to 34 year olds, people from CALD backgrounds and people with a high household income.

22% of respondents are 'positive converters'

These are the people who, irrespective of their likelihood to consider a heat pump water heater initially, are more likely to do so after considering the information (i.e. they move up the scale). For example, a respondent might be 'not very likely' to consider a heat pump water heater initially, and the arguments gave that person reason to now feel 'somewhat likely' to consider a heat pump water heater.

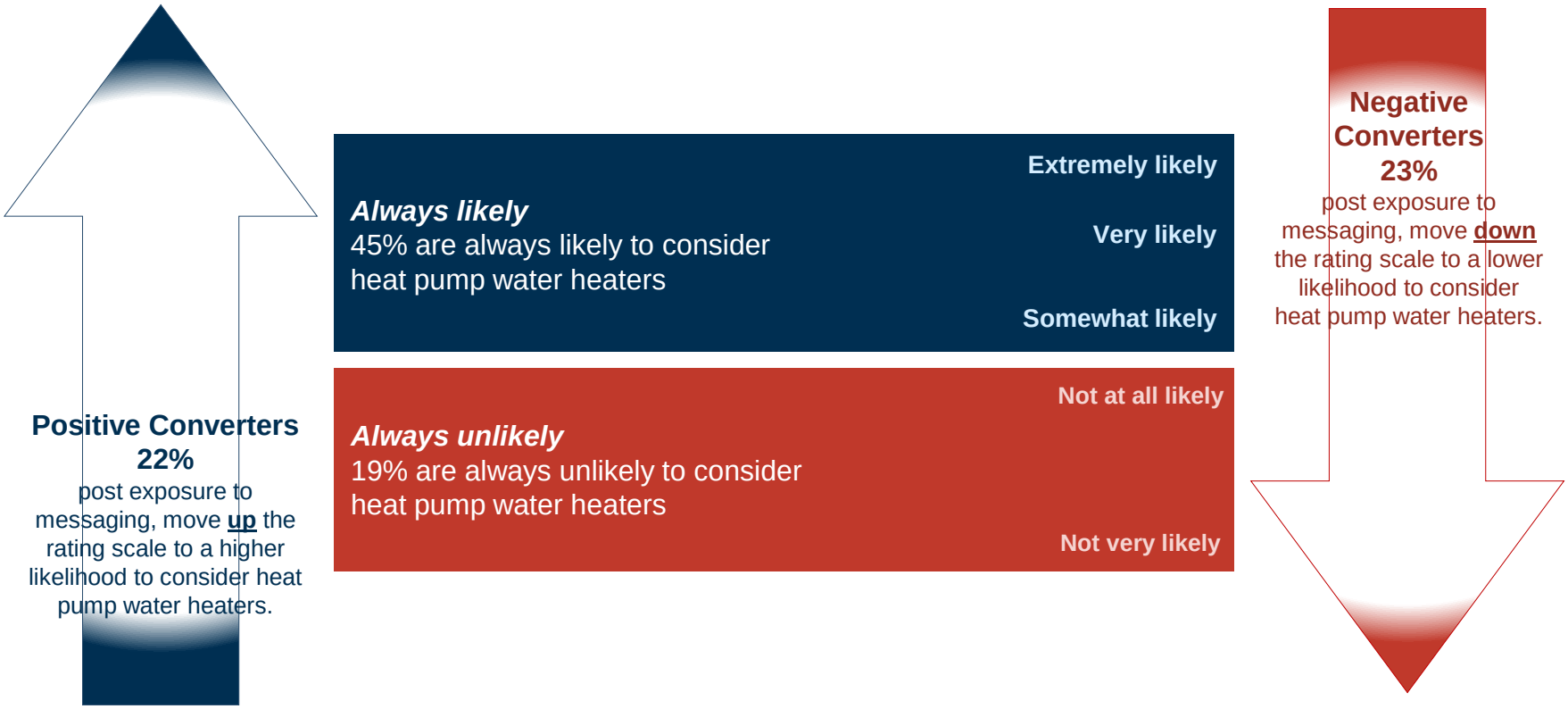
Another respondent may feel 'somewhat likely' to consider a heat pump water heater initially, and on consideration of the arguments, now feels 'very likely'. These people are described as positive converters as they have moved up the scale, however they also fall into the 'always likely' category as well. There is a higher incidence of 'positive converters' among 18 to 34 year olds.

23% of respondents are 'negative converters'

'Negative converters' are those who move down the likelihood scale after considering the arguments provided. 'Negative converters' are evenly spread across all cohorts.

Positive converters are balanced out by negative converters after consideration of information

Converter analysis shows the movement in claimed likelihood to consider a heat pump water heater following exposure to balanced messaging (i.e. arguments for and against).



Note: Converter analysis categories are not mutually exclusive, therefore the percentages add to more than 100%.

18 to 34 year olds are most open to considering heat pump water heaters and are swayed by the arguments

Positive Converters (22%)

There is **a *higher incidence* of positive converters among people aged 18 to 34 years** (27%).

- And also **among likely home owners** (28%).

Positive converters are convinced by the arguments in favour of heat pump water heaters. They are:

- **Significantly *more likely* than average to agree with the arguments in favour of heat pump water heaters**.
- As likely as the population on average to agree with the arguments against heat pump water heaters.

Always likely (45%)

There is **a *higher incidence* of always being likely to consider a heat pump water heater among people aged 18 to 34 years** (60%), people from **CALD backgrounds** (53%) and those with a **high household income** (51%).

- And **also among likely home owners** (66%).

Those who are 'always likely' are swayed more by the arguments in favour of heat pump water heaters. They are:

- **Significantly *more likely* than average to agree with the arguments in favour of heat pump water heaters.**
- Significantly *less likely* than average to agree that heat pump water heaters are 'more expensive' and 'do not work in a blackout' are good arguments against these.

Negative Converters (23%)

Negative converters are equally represented among all demographic and geographic cohorts.

Negative converters are swayed by most arguments against heat pump water heaters. They are:

- As likely as the population on average to agree with the arguments in favour of heat pump water heaters. The exception is that they can 'be solar panel-powered' – negative converters are significantly *less likely* to agree.
- **Significantly *more likely* than average to agree with arguments against heat pump water heaters. The exception is that 'heat pumps can be noisy'** – negative converters are as likely as the population to agree.

Always unlikely (19%)

There is **a *higher incidence* of always being unlikely to consider a heat pump water heater among people aged 55+ years** (31%), **regional residents** (26%) and those with a **low household income** (27%).

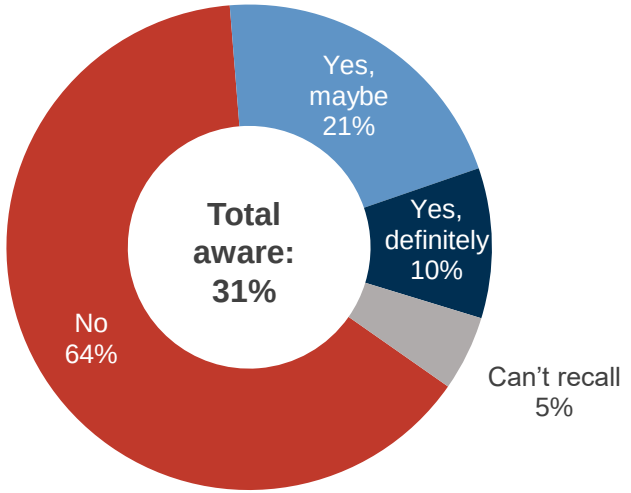
- And **also among home owners** (23%).

Those who are 'always unlikely' are swayed by arguments against heat pump water heaters. They are:

- Significantly *less likely* than average to agree with the arguments in favour of heat pump water heaters.
- **Significantly *more likely* than average to agree with the arguments against heat pump water heaters.**

Close to a third of home owners claim they are aware of the Solar Homes program

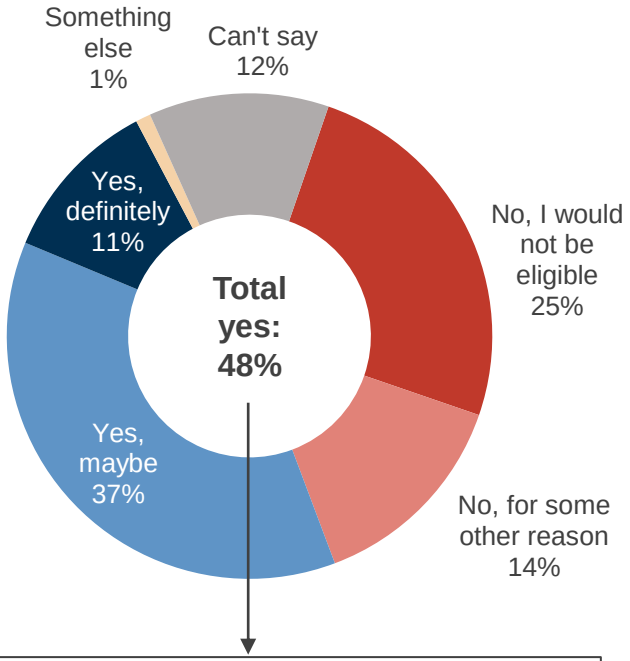
Awareness of the Victorian Government's Solar Homes program (%)



Q33. The Victorian Government's Solar Homes program offers rebates of up to $1,000 to eligible households to support the installation of heat pump or solar water heaters. Before today, were you aware that a rebate like this was available?
Base: Home owners (n=1,500)

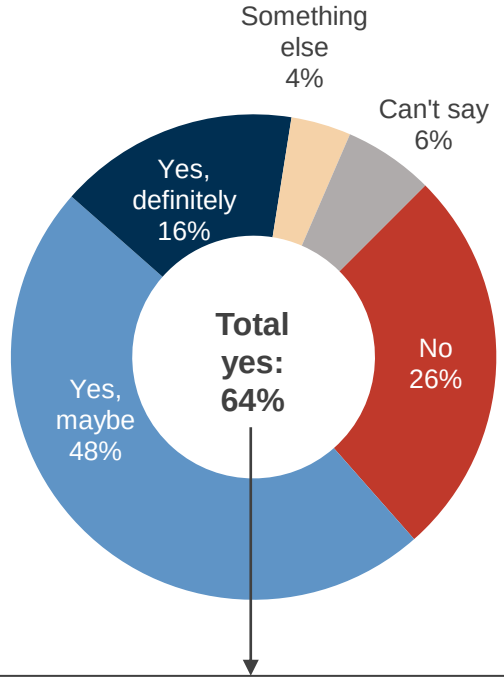
Close to half of home owners express interest in heat pumps or solar water heaters under provision of a rebate

Likelihood to install a heat pump or solar water heater if rebate available (%)



48% of home owners are likely (either 'definitely' or 'maybe') to install a heat pump or solar water heater given the availability of a rebate. This is *significantly different* among:
18-34 years: 60, Med HHI: 55, 55+ years: 41

Likelihood to install a heat pump or solar water heater if eligibility criteria for rebate removed (%) *(among those not eligible)*



64% of home owners not eligible for a rebate are likely to install a heat pump or solar water heater if a rebate were made available to them. This is *significantly different* among:
High HHI: 75, 55+ years: 55, Low HHI: 49

Significantly higher / lower than the total at the 95% confidence interval.
Q34.To be eligible for the rebate of up to $1,000 to support the installation of heat pump or solar water heaters, households must: Replace a hot water system that is more than three years old. Not have received a solar panel rebate from Solar Victoria. Have a household income of less than $180,000. Live in a house worth less than $3 million. Does the availability of this rebate make you more likely to install a heat pump or solar water heater if you were to replace your hot water system? / Q34a. If the eligibility criteria were removed, would the availability of this rebate of up to $1,000 make you more likely to install a heat pump or solar water heater if you were to replace your hot water system?
Base: Home owners (n=1,500); home owners not eligible for a rebate (n=370)

Investors

Section summary – Investors

Some investors are open to considering induction cooktops for their rental properties

More than three in five investors have gas cooktops in their rental properties, compared to just one in ten who have electric induction. Reflecting a broader shift toward induction, close to half of investors are willing to consider induction cooktops for their rental properties – noting this is lower than the two in three people who would consider it for their own home.

Willingness to consider reverse cycle air conditioners for heating

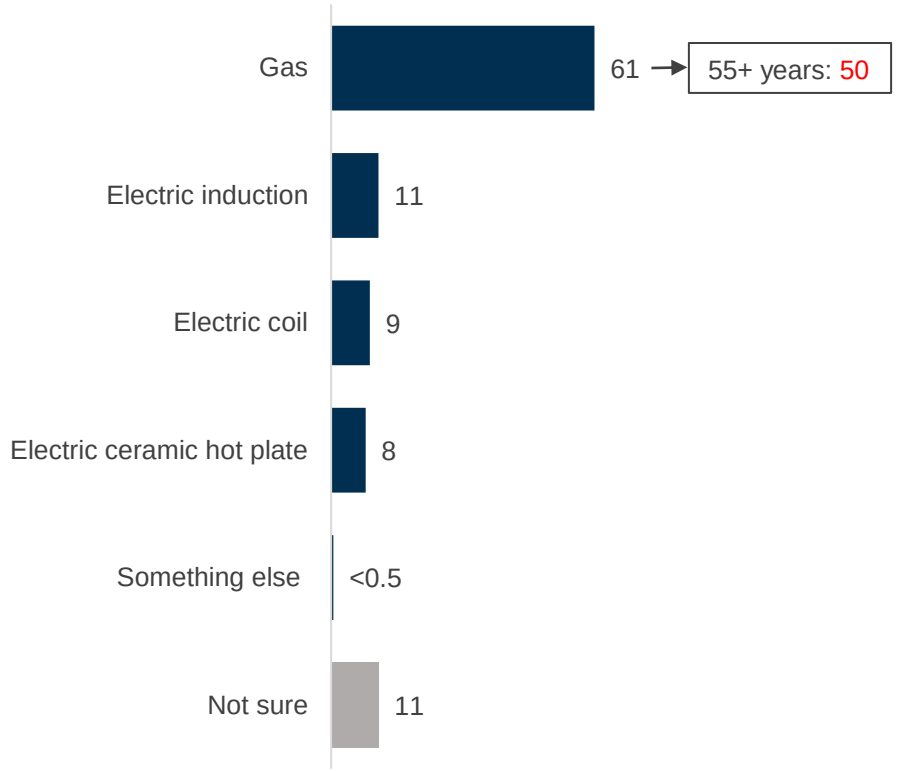
More than 40% of investors have reverse cycle air conditioners in their rental properties and more than a third have gas ducted heating (some with cooling add-on). Consideration of reverse cycle air conditioners for heating is mixed. Around half of investors are likely to consider both split system and ducted reverse cycle air conditioners as the main heater in their rental properties, but around two in five are 'unlikely'.

Investors are divided in their consideration of heat pump water heaters

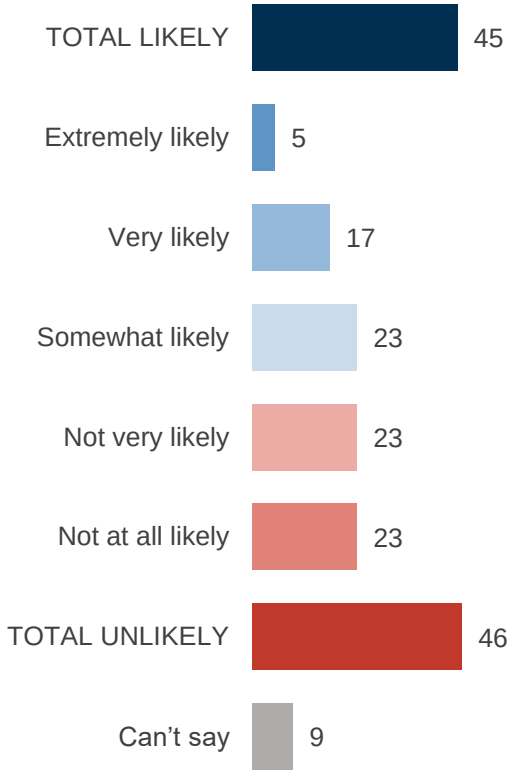
Gas is also the most common hot water system investors have in their rental properties, with less than one in ten each having solar or heat pump water heaters. Investors are polarised in their likelihood to consider heat pump water heaters for their rental properties, with equal proportions being either 'likely' ('extremely', 'very' or 'somewhat') or 'unlikely'.

The clear majority of investors have a gas cooktop installed in their rental property

Type of cooktop in rental property (%)



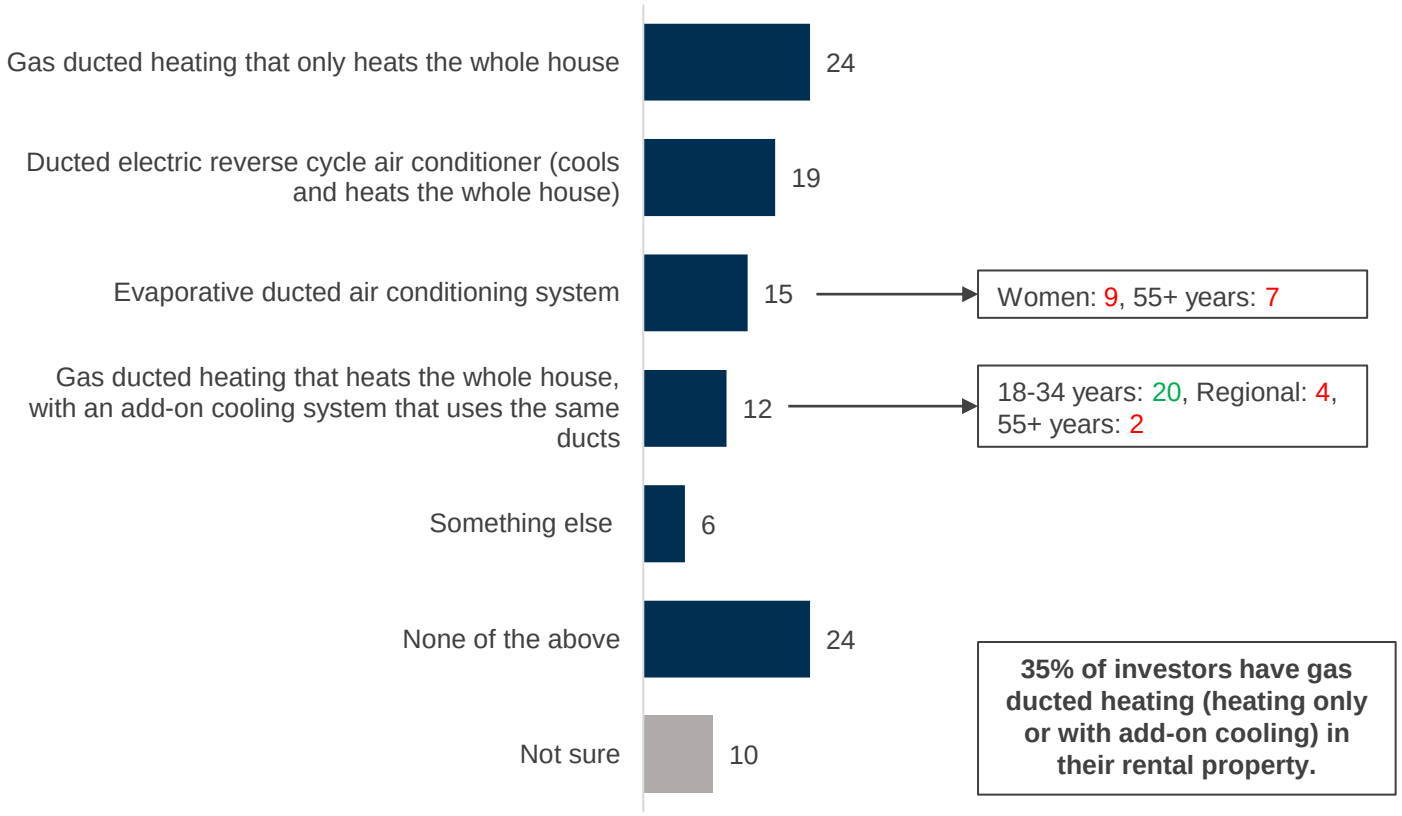
Likelihood to consider an induction cooktop for rental property (%)



Significantly lower than the total at the 95% confidence interval.
I7. What type of cooktop does your rental property have (the one you most recently purchased that is in Victoria). Is the cooktop… / I8. How likely would you be to consider an induction cooktop for your rental property? Would you say you are…
Base: Investors (n=472); investors who don't have an electric induction cooktop in their rental property (n=421)

A third of investors have gas ducted heating in their rental property (some with cooling add-on)

Heating and cooling systems that work across entire house in rental property (%)
(multiple response)

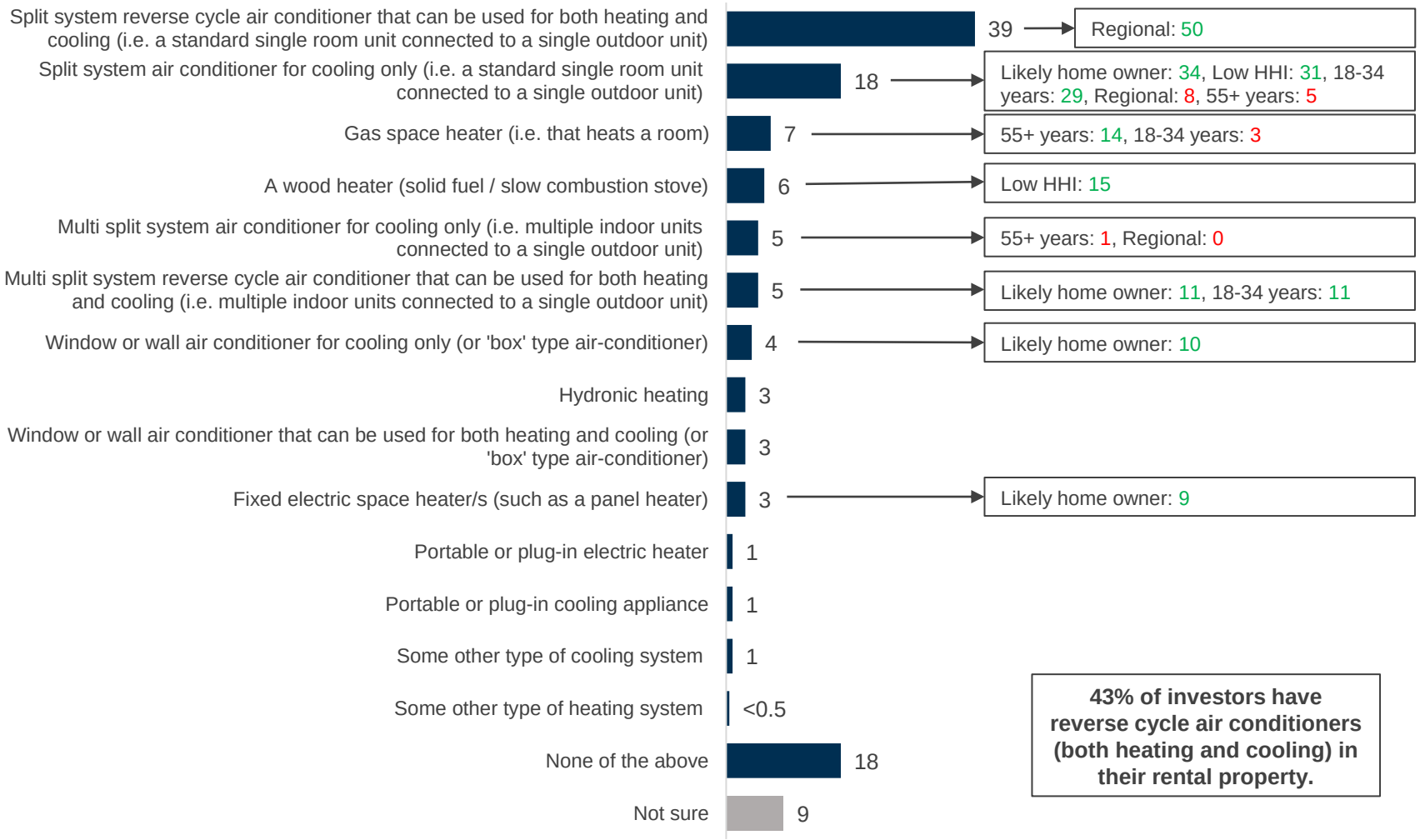


Significantly higher / lower than the total at the 95% confidence interval.
*I9. Do you have any of the following heating or cooling systems that work across the entire house **in your rental property**? (In the following questions, we will ask about heating or cooling appliances that work in individual rooms). Please select all that apply.*
Base: Investors (n=472)

Two in five investors have reverse cycle air conditioners in their rental property (that can be used to heat and cool)

Heating or cooling appliances that heat or cool individual rooms in rental property (%)

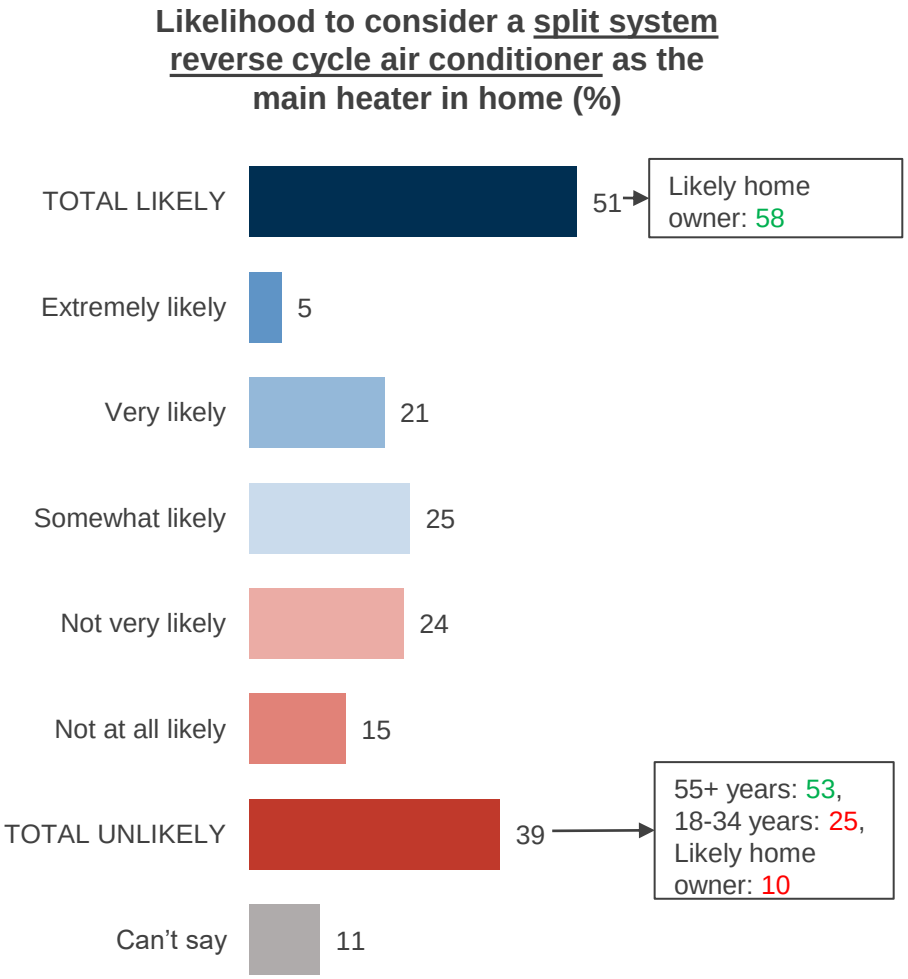
(multiple response)

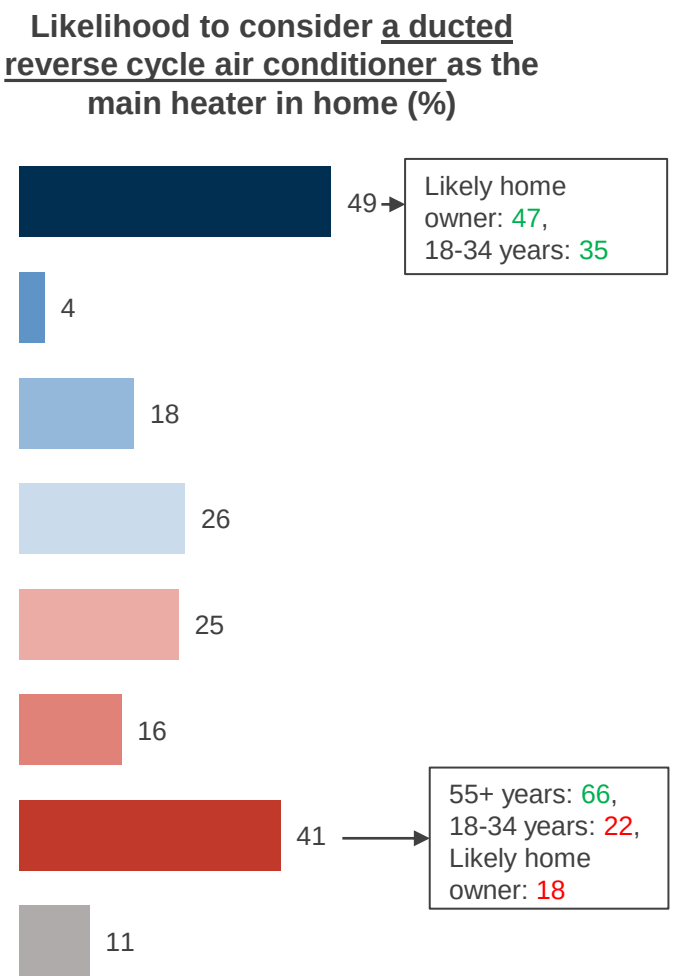


43% of investors have reverse cycle air conditioners (both heating and cooling) in their rental property.

Significantly higher / lower than the total at the 95% confidence interval.
*I10. Do you have any of the following heating or cooling appliances that heat or cool individual rooms **in your rental property**? Please select all that apply.*
Base: Investors (n=472)

A quarter of investors are 'extremely' or 'very likely' to consider reverse cycle air conditioners for heating

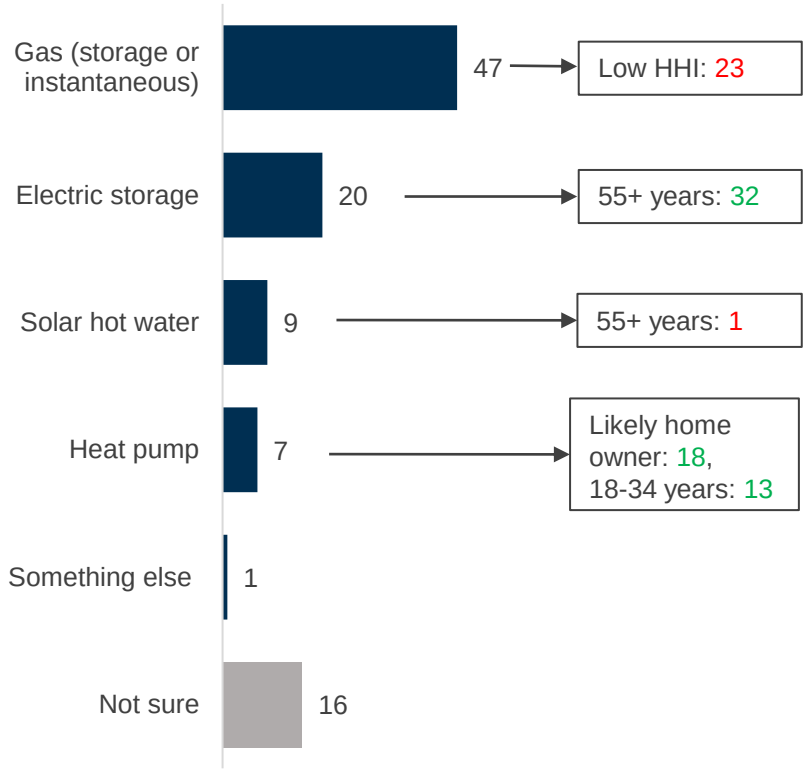




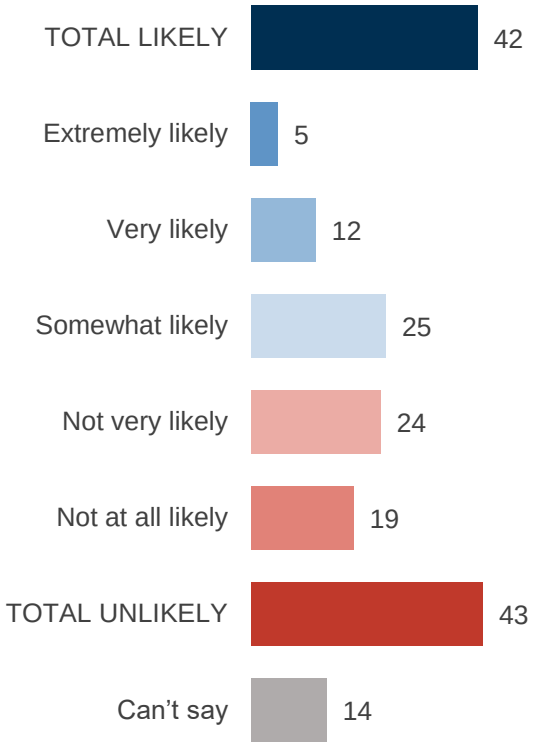
Significantly higher / lower than the total at the 95% confidence interval.
I11. How likely would you be to consider split system reverse cycle air conditioners and electric ducted reverse cycle air conditioning as the main heating for your rental property? Would you say…
Base: Investors who do not have split system air conditioning for heating in rental property (n=259)

Close to half of investors have a gas hot water system installed in their rental property

Type of hot water system in rental property (%)



Likelihood to consider a heat pump water heater for rental property (%)



Significantly higher / lower than the total at the 95% confidence interval.
I12. What type of hot water system do you have in your rental property … / I13. How likely would you be to consider a heat pump water heater for your rental property? Just to remind you, heat pump water heaters are the same technology as reverse cycle air conditioners. They draw energy in the form of heat from the air outside the home to heat water. Electricity is used to run the fan and the compressor. Would you say you are…
Base: Investors (n=472); investors who do not have a heat pump in rental property (n=438)

Appendices

Appendix A: Demographics

Demographic profile of respondents

Gender	%
Male	48
Female	52

Area	%
Metro	76
Regional	24

Age	%
18-24 years	10
25-34 years	22
35-44 years	20
45-54 years	14
55-64 years	14
65+ years	21

Ownership of residential investment or rental properties	%
Yes, one rental property only	18
Yes, more than one rental property	6
No	75
Prefer not to say	1

Annual household income	%
Less than $25,000	4
$25,000 to less than $50,000	14
$50,000 to less than $75,000	14
$75,000 to less than $100,000	16
$100,000 to less than $150,000	18
$150,000 to less than $200,000	11
$200,000 plus	9
Can't say / Prefer not to say	14

Ownership status	Total	Age %		
	%	18-34 years	35-54 years	55+ years
Own home (either outright or with a mortgage)	76	51	79	97
Rent	24	49	21	3

Significantly higher / lower than the total at the 95% confidence interval.
S1. Please indicate your gender: / S2. How old are you? / S3a. And what is your postcode? / S4. Do you own or rent the home you live in? / S9. Do you currently own any residential investment or rental properties in Victoria (i.e. homes that you own but do not live in)? / S15. Finally, which of the following best describes your annual household income before tax?
Base: All respondents (n=2,014)

Type of home

Type of home	%
Separate house	78
Semi-detached, row or terrace house, townhouse	10
Flat, unit or apartment	12
Something else	<0.5
Can't say / Prefer not to say	<0.5

Property built	%
Before 1980	30
Between 1980 and 1994	19
Between 1995 and 2004	15
Between 2005 and 2014	18
2015 or later	15
Can't say	2

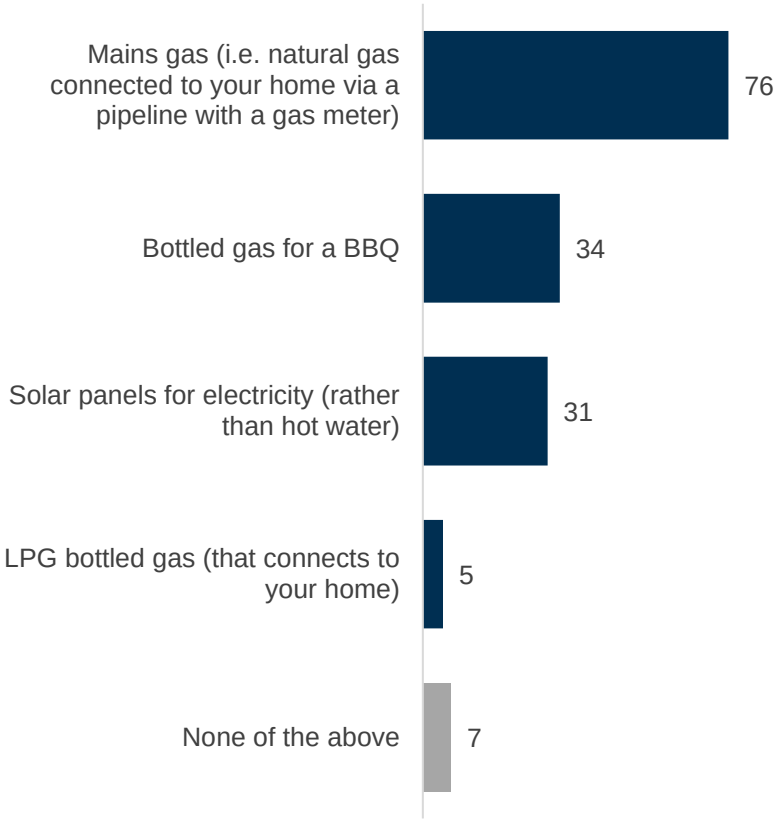
Home features (%)

	Bedrooms	Bathrooms	Storeys
One	3	29	73
Two	15	57	20
Three or more	78	10	3
Prefer not to say	4	4	4

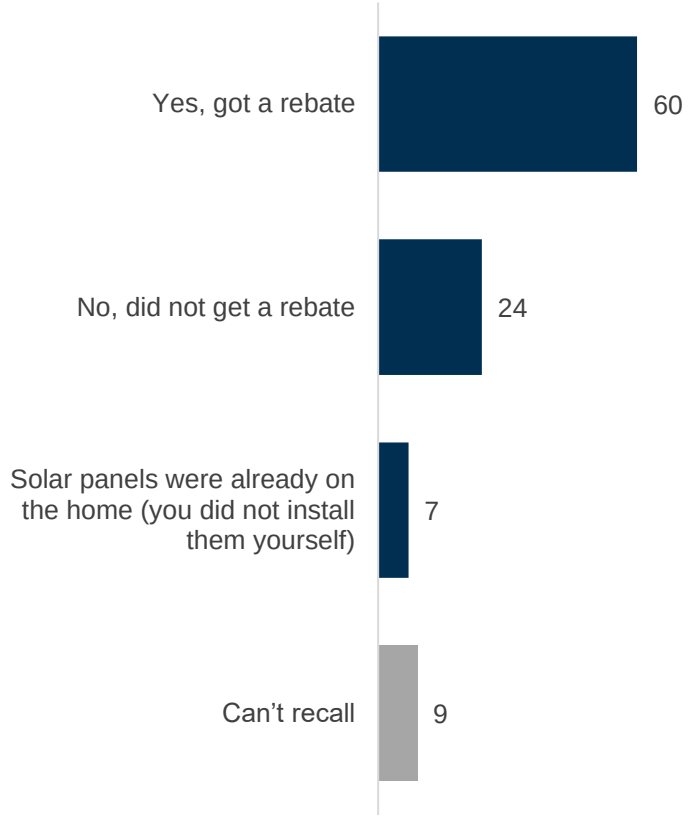
S5. Is your home a… / S6. Was your home built… / S10. How many of each of the following does your home have?
Base: Home owners (n=1,500)

Fuel types in the home

Energy sources in the home (%)
(multiple response)



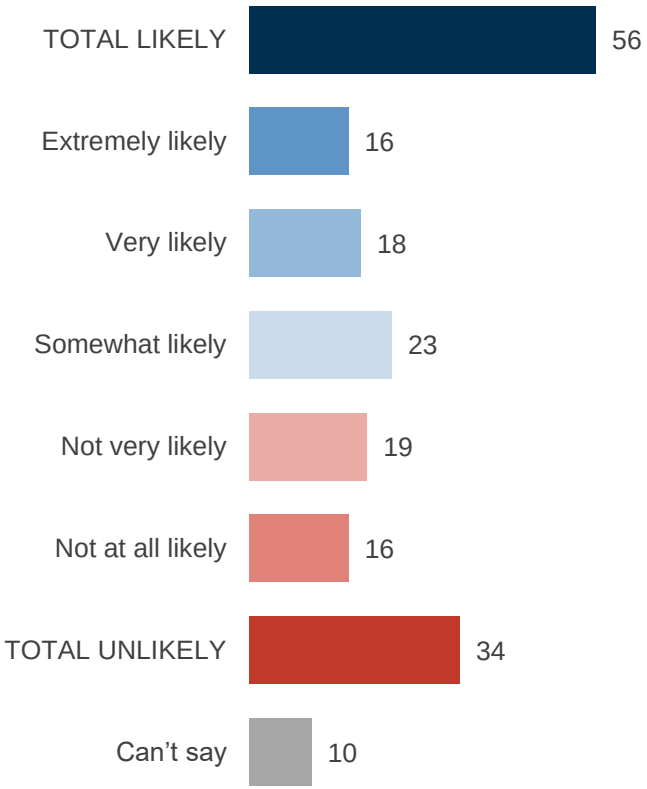
Solar Homes program rebate (%)
(among home owners with solar panels for electricity)



S12. Do you have any of the following in the home you live in? / S13. Did you get a rebate from the Victorian Government when you installed the solar panels on your home? This rebate is called the Solar Homes program.
Base: Home owners (n=1,500); home owners with solar panels for electricity (n=464).

Likelihood to install solar panels

Likelihood to install solar panels for electricity within the next five years (%)
(among home owners who do not have solar panels and likely home owners)



S14. How likely are you to install solar panels for electricity on your [IF HOMEOWNER SAY: home within the next five years?] / [IF RENTER SAY: future home?]
Base: Home owners who do not have solar panels for electricity and renters (n=1,536).

Profile of the future homes of likely home owners

Type of future home	%
Separate house	70
Flat, unit or apartment	18
Semi-detached, row or terrace house, townhouse	10
Something else	1
Can't say / Prefer not to say	1

Gas mains in future home	%
Yes, I would want mains connected gas	71
No, I only want electricity in my home	11
Have no preference	14
Not sure	4

Q1. Thinking about the type of home you might own in the future, do you think you will be most likely to buy a…
Q2. Would you want your new home to have mains gas (i.e. natural gas connected to your home via a pipeline with a gas meter)?
Base: Likely home owners (n=500)

Profile of investment properties

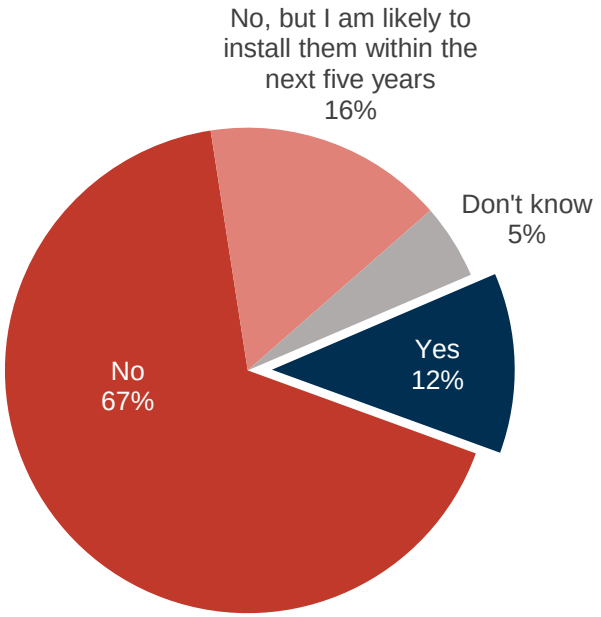
Type of rental property	%
Separate house	48
Semi-detached, row or terrace house, townhouse	14
Flat, unit or apartment	37
Something else	<0.5
Can't say / Prefer not to say	<0.5

Rental property built	%
Before 1980	25
Between 1980 and 2004	32
2005 or later	39
Can’t say	3

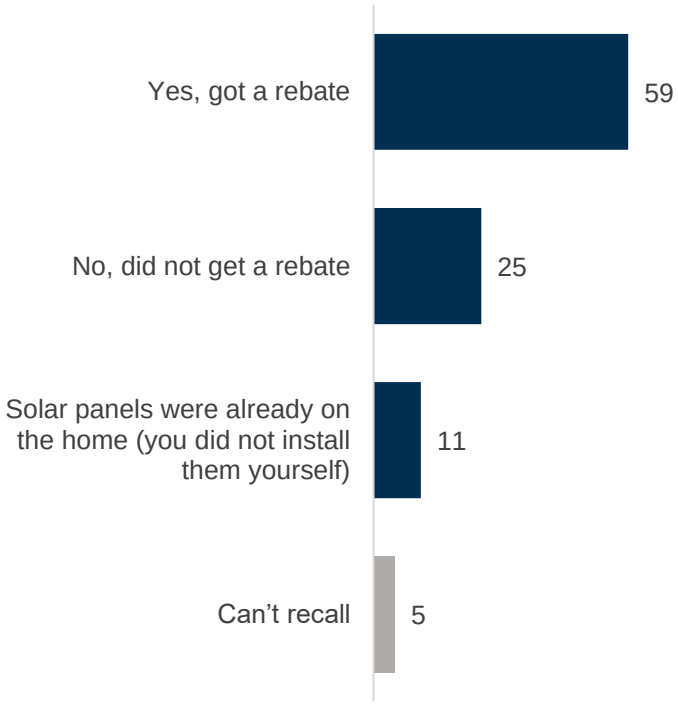
I3. Is this rental property (the one you purchased most recently) a… / I4. And when was this rental property built…
Base: Investors (n=472)

Solar panels on the rental property

Solar panels for electricity (%)



Solar Homes program rebate (%)
(among those with solar panels)

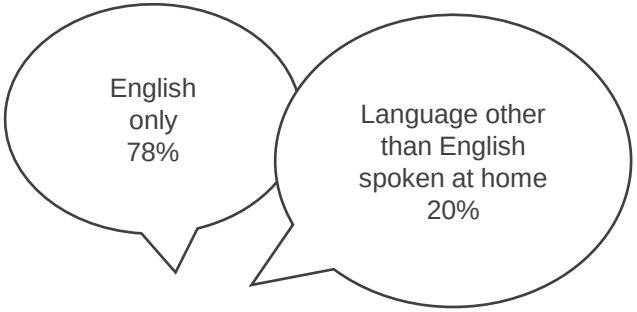


I5. Does your rental property have solar panels for electricity (rather than for hot water only)? / I6. Did you get a rebate from the Victorian Government when you installed the solar panels on your rental property? This rebate is called the Solar Homes program.
Base: Investors (n=472); investors whose rental property have solar panels for electricity (n=62)

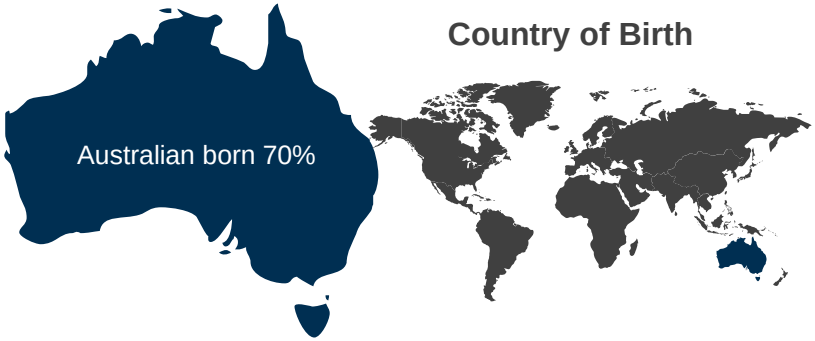
Demographics: Culturally and linguistically diverse (CALD)

CALD: 28%

Language spoken at home*



Country of Birth



Born in a country other than Australia 30%

• Other	6%
• United Kingdom	5%
• India	5%
• Other Asian	4%
• New Zealand	2%
• Other European	1%
• Italy	1%
• Vietnam	1%
• China	1%

Other countries mentioned by less than 1% of respondents include: Canada, United States, Greece, Germany, Korea, Japan.

Note: this is not an exhaustive list of countries mentioned.

S16. Do you speak a language other than English at home? / S17. In which country were you born?
Base: All respondents (n=2,014)
**2% of respondents chose the 'Prefer not to say' response.*

Appendix B: Stimulus material

Stimulus material: Images used in questionnaire

Cooktops

Gas	Electric ceramic hot plate	Electric coil	Electric induction
			

Stimulus material: Images used in questionnaire (cont'd)

Heating and cooling

Split system air conditioner for cooling only (i.e. a standard single room unit connected to a single outdoor unit)	Split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. a standard single room unit connected to a single outdoor unit)	Multi split system air conditioner for cooling only (i.e. multiple indoor units connected to a single outdoor unit)	Multi split system reverse cycle air conditioner that can be used for both heating and cooling (i.e. multiple indoor units connected to a single outdoor unit)	Window or wall air conditioner for cooling only (or 'box' type air-conditioner)	Window or wall air conditioner that can be used for both heating and cooling (or 'box' type air-conditioner)
					
Gas space heater (i.e. that heats a room)	**Fixed electric space heater/s (such as a panel heater)**	**Portable or plug-in cooling appliance**	**Portable or plug-in electric heater**	**A wood heater (solid fuel / slow combustion stove)**	**Hydronic heating**
					

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