

**Stage 1**

# **Geelong Sustainability Electric Homes Participant Survey report**

**October 2024**





# 2023 Participant Survey Report

## Electric Homes Program

*This public version of the report has had some sections redacted due to commercial sensitivities.*



Approved by	Status	Document usage
Dan Cowdell, CEO	Approved <input type="button" value="v"/> 10 October 2024	<b>Public Document</b> Redacted report for public distribution



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## Introduction

The 2023 Electric Homes Program, a collaborative initiative led by Geelong Sustainability in partnership with RACV Solar, Reclaim Energy, Jeztek Plumbing, and various community organisations, aimed to facilitate the transition of residents across the G21 region towards efficient, all-electric homes powered by renewable energy sources. This report offers an in-depth analysis of survey data collected from 189 respondents, providing valuable insights into awareness levels, participation rates, preferences, barriers, and overall satisfaction with the program.

## Outcomes of the program:

### Throughout the Electric Homes Program 2023 we saw:

- 1,500 attendees.
- 18 information sessions run around the region in person and online.
- 927 unique enquiries.
- 318 installed systems.
- The program stimulated \$2,053,185 of capital investment.
- A total of \$81,328 saved annually on energy bills.
- Over 25 years, this equates to \$2,033,200 worth of savings.
- 770 tons of Co2 of emissions reduced over a one year period.
- 18,328 tons of Co2 of emission reduction over the lifetime of the products, 25 years.
- Community donations with 3 x 6.6kW solar systems and six hot water heat pump systems will be donated to Wathaurong Aboriginal Cooperative and Norlane Community Initiatives.

Independent economic analysis from the City of Greater Geelong Economic Development department found that the program:

- Increased revenue in the regional economy by \$4.7 million (\$2.1m direct output and \$2.6m indirect output due to the flow on supply-chain and consumption impacts).
- Supported 12 regional jobs and \$902,000 in wages and salaries (5 direct jobs and 7 indirect jobs).
- Increased Gross Regional Product by \$1.7 million.

The breakdown of the systems installed include 158 heat pump hot water systems also saw commendable uptake, 72 split system heating and cooling, 84 solar and battery and 1 EV system.

As an organisation we were pleased with the outcomes of the program however we also see many opportunities for learning, growth and change. We were delighted to be able to survey some of the participants involved in various aspects of the program to gather a greater understanding of what some of the strengths and weaknesses were of this program and how we might address them moving forward.

Geelong Sustainability extends its gratitude to the G21 council partners for their support of this program. Special recognition goes to the City of Greater Geelong, our major supporter, and the Borough of Queenscliffe, Golden Plains Shire, Colac Otway Shire, and Surf Coast Shire for their collaboration in promoting and engaging their communities.

## Program Partners

Led by:



Delivered by:



Major supporter:



Research partner:



Supported by local councils:



Community partners:



# Executive Summary



## Summary

In total, the program survey received 189 responses with 130 of them submitting an expression of interest (71%). The survey was first sent to a small test sample of 180 customers (74) and attendees (106) on 18th April 2024 to check the survey functionality was operating correctly. It was then sent to the remaining full list of 1,215 contacts which included customers (108) and attendees (1,109) on 22 April. The survey was conducted over a month period with one reminder email sent on 13 May and closed on Monday 20th May 2024. This report gives a snapshot of the results received from the 189 respondents during this time.

*“I think the programme has been fantastic. Well done to all.”*

## Highlights

**For the respondents of the survey for the Electric Homes Program, here are some of the highlights of the survey:**

- **Overall:** 189 survey responses with 130 of them putting in an expression of interest (EOI) with 70 of those going through to installation.
- **Lead interest:** Heat pumps were the leading interest for the EOIs
- **Lead generator:** Geelong Sustainability was the major lead generator for the Electric Homes Program EOI and 65% of the survey respondents went to an information session.
- **Drivers of interest:** The major drivers influencing people's decisions to go all electric were reducing emissions and saving on energy bills.
- **Barriers:** Financial and the high cost of the systems were noted as the most common barrier for people moving ahead with conversion.
- **Future Initiatives:** The leading interests for future initiatives were being part of a local energy sharing network, being part of a neighbourhood battery initiative and switching to a community owned energy retailer.
- **Overall satisfaction:** Satisfaction of the program was relatively good with 72% satisfied with the communications from the program and 68% satisfied with the community outcomes of the program. 66% stated the Electric Homes Program met their expectations and 74% said they would recommend the program to a friend or family member.

*“Knowing that the Electric Homes Program had vetted the products and installers was a key factor for us, it gave peace of mind in going ahead with the relatively new technology (heat pump hot water) and also saved us a lot of time. We will definitely participate in any further initiatives where possible.”*

## Recommendations for future programs

Based on the survey findings, several key areas have been identified for enhancing the Electric Homes Program. These recommendations aim to improve community engagement, customer satisfaction, and accessibility, ensuring a more effective and inclusive approach in the next program iteration. The focus areas include increasing awareness of community donations, improving the customer journey, tailoring information sessions to better meet customer needs, addressing barriers to access, and promoting financially achievable offerings. Implementing these strategies will hopefully help maximise the program's impact and support a smoother transition for participants toward sustainable living.

### Recommendations

1. **Improve Customer Journey:** Address issues related to timely contact and response to enhance the customer experience. Implement better tracking and follow-up mechanisms to ensure efficient communication.
2. **Tailored Information Sessions:** Develop more tailored and comprehensive information sessions to better meet customer needs with more question and answer time available during the sessions. It is recommended that alongside the general information sessions that there are sessions that can deep dive into each speciality area for those who want to learn more of the technical side of each appliance and technology.
3. **Address Barriers to Access:** Focus on reducing the high cost barrier by creating more financially achievable offerings, increasing finance options, and providing clear guidance for those exploring household electrification while maintaining program quality and integrity.
4. **Enhance Community Donation Awareness:** Integrate the community donation aspect more prominently in promotional materials, communications and customer journey to increase awareness of the community donation element of the program.

## Survey Results

### Awareness of the Electric Homes program

The program had a large focus on advertising and promotion to make sure the community were aware of the great opportunity to participate in the Electric Homes Program. We used a variety of advertising means to connect with potential customers.

In terms of awareness, the survey revealed that the majority of respondents (71%) learned about the Electric Homes Program through Geelong Sustainability, indicating the effectiveness of our organisation's promotional campaign. Social media emerged as the second most common channel, with 16% of respondents citing it as their source of information. Community groups, council communications, and newspaper ads/articles each contributed to awareness to varying degrees, with 8-10% of respondents mentioning these channels. Additionally, a small percentage of respondents were informed through other sources, such as RACV Solar, email, and word of mouth.

### Community Information Events

70% of survey respondents indicated attending information sessions or a webinar for the Electric Homes Program.

Feedback from attendees was fairly positive, with a significant proportion (84%) strongly agreeing or agreeing the presentation met their expectations.

Specifically, 117 out of 127 (92%) respondents found the sessions ran on time and were of a good length, while 114 (90%) attendees found the content easy to follow. The presenters were also well-received, with 112 (88%) participants considering them knowledgeable and engaging.



However, there were some concerns raised regarding the Q&A segment, suggesting areas for improvement in the time allowed for addressing questions during the information sessions. Only 86 (69%) people said the sessions improved their understanding of electric homes, another area that could be improved. Interestingly people attending an information session did not increase the conversion rate to installation. Those who attended an information session had a 38% conversion rate to install compared to the 40% who did not attend an information session. After reading some of the comments and feedback, there appeared to be a desire for people to have specific tailored sessions earlier on in the program.

***“I appreciated knowledgeable people in the industry making themselves available to explain the benefits to transition away from gas and how to go about it and what rebates are available to retrofit our homes.”***



## Electrification Drivers

The major drivers influencing people's decisions to go all electric were reducing emissions and savings on energy bills. Of the survey participants the following indicated that it was extremely important or very important in their decision to invest in a new system/s:

- 161 (85%) participants rated reducing emissions
- 150 (79%) participants rated saving on energy bills
- 145 (77%) participants rated better livability
- 135 (71%) participants rated wanting to transition off gas
- 125 (66%) participants rated comfort level
- 115 (61%) participants rated health benefits of transitioning off gas
- 66 (35%) participants rated increasing property value

## Expressions of Interest

We received 927 unique enquiries to speak with suppliers or to receive quotes through for the Electric Homes Program and amongst the survey respondents 130 of them put in an expression of interest as follows.

For the survey participants who submitted an Expression of Interest (130 respondents) the most popular system type was the heat pump hot water system, with 72% (93) expressing interest, followed by solar panel systems at 37% (48), and reverse cycle split systems at 32% (41). Interest in solar and battery systems was 27% (35), battery-only systems 15% (19), and electric vehicle chargers were the least popular at 10% (13).

## Barriers for people not proceeding

We wanted to understand the barriers from people that did not proceed through the program. Out of the 189 respondents 112 (59%) did not proceed with installations through the program. Of those that did not proceed through the program 32% went with other providers whilst the program has helped to spur these residents on to install a system it should be noted this is still contributing to Geelong Sustainability's overall goal of net-zero emissions for our region, it does however demonstrate a lost opportunity for the program. Several barriers to participation were identified among respondents who chose not to proceed with the Electric Homes Program. The most common barrier cited were as follows:

- **Financial:** The high cost of the systems emerged as the most common barrier, with 35% (39 respondents) citing it as a significant obstacle.
- **Information Gathering:** A considerable portion, 32% (36 respondents), were in the initial stages of gathering information about electric homes.
- **Other Unspecified Reasons:** Similarly, 32% (36 respondents) mentioned other unspecified reasons for not proceeding. These included personal circumstances, preferences, customer journey or factors not captured by the survey.

## Community Donation

The program had an extra 'give back' feature as part of the social dividend, our delivery partners agreed to donate solar panel systems and hot water heat pumps to families through Wathaurong Aboriginal Co-operative. Due to the strong community support, 4 x 6.6kW solar systems and six hot water heat pump systems will be donated.

Over half the respondents (58%) were previously aware that community donations formed part of the program, indicating that although there is a level of awareness and understanding of the program's broader social impact it could have been better. However, responses regarding the influence of community donations on participation varied, with 34% agreeing or strongly agreeing, 50% remaining neutral, and 16% disagreeing or strongly disagreeing. This suggests that while some participants were positively influenced by the community donations, others may have been less affected or unaffected by this aspect in their decision-making process.

## Behaviour Change

Through the program we aimed to also impact behaviour change through the education elements of the program and sharing energy efficiency literacy with our community. We found that 70% of the respondents who got a system installed through the program agreed or strongly agreed that they have changed their energy use to rely more on their own clean energy.

*'I have changed my patterns of energy use to rely more on my own clean energy.'*

*'We changed the times we heated water / dishwasher / clothes washing and some home heating and cooling to optimise use of solar and minimise use of grid'*

*'We use more hot water now that energy is almost zero cost compared with expensive, polluting gas.'*

*'We have been delighted to discover just how much power is available to use from the sun and batteries.'*

*'I now use appliances such as dishwasher, washing machine, cooler, heater etc, hot water heat pump to coincide with solar generation'*

## Overall experience of the program

Overall there was a positive experience of the Electric Homes Program with the participants agreeing and strongly agreeing with the following:

- 72% were satisfied with the communications from the program
- 68% were satisfied with the community outcomes of the program
- 66% stated the Electric Homes Program met their expectations
- 75% said they would recommend the program to a friend or family member.

## Further Interest Areas

We asked the survey participants what future interest in emissions reductions initiatives to be plan and support our community into the future, below is a summary from highest to lowest interest:

1. **Being part of a local energy sharing network:** 134 interested, 35 not interested.
2. **Being part of a neighbourhood battery initiative:** 132 interested, 32 not interested.
3. **Switching to a community owned energy retailer:** 128 interested, 37 not interested.
4. **Investing in community-owned solar project:** 106 interested, 52 not interested.
5. **Adding battery storage to your solar system:** 102 interested, 24 not interested.
6. **Energy efficiency assessment:** 101 interested, 48 not interested.
7. **Upgrading insulation or draught proofing:** 94 interested, 29 not interested.
8. **Adding more solar panels:** 71 interested, 40 not interested.
9. **Installing a heat pump hot water system:** 67 interested, 12 not interested.
10. **Installing solar on rental property/business:** 23 interested, 26 not interested.

## Age of respondents

- 25-34 year olds: 2%
- 35-44 year olds: 11%
- 45-54 year olds: 15%
- 55-64 year olds: 26%
- 65 & over: 44%

## Income bracket

- 0-\$31,199 per year: 7%
- \$31,200- \$51,999: 14%
- \$52,000- \$103,999: 26%
- \$104,000- \$156,599- 16%
- \$156,600 and over- 14%
- Prefer not to say: 24%

## Further Questions

We asked the survey participants if they had further capacity to answer a few additional questions for us to gather further data and insights, 133 responded, 70% of overall survey respondents.

### Previous upgrades or renovations:

- 76% of them have installed upgrades or renovated their home before, a large percentage of them doing this within the past 5 years indicating the impact of the transition and education in this area.
- 67% of them included system/s that electrify your home in upgrades or renovations.
- 78% of them organised it themselves, with 22% of them went through a program



### **Finances insights:**

- Most of the survey participants financed their upgrade through savings (or mortgage offset) 91%, personal or green loans 6%, finance provided through project partner 2%, and 6% other.
- 36% agreed and 34% said 'Maybe' that the inclusion of low cost financing options would have increased the number of measures they would consider for electrifying their home.

### **Influencing factors:**

We were wanting to gain insights into the social norms of what would influence people to get a new or additional system/s installed, what we found was:

- People's personal values and principles was the biggest driver with 91% strongly agreeing or agreeing it would drive their decisions.
- Followed by 53% indicated that they would be influenced by feeling personally obligated to install a new system to electrify their home.
- 38% stated that if people who are important to them thought they should install a new system to electrify my home it would influence their decisions.
- Only 29% said what people think who influence their decisions would influence them to install a new system to electrify my home.

This indicates that personal values and principals are the leading drivers for people making decisions around upgrading or electrifying their home, followed by the feeling that there is some sort of obligation for them to do so.

### **Prevented them from going ahead with measures initially considered:**

We asked participants what prevented them going through with some of the measures they initially considered. Once again it was reflected that finances and cost were the biggest barrier for people moving forwards with 36% indicating this. Whereas 26% noted other reasons and 21% indicated they may undertake these measures in the future.

## **Conclusion**

As an organisation it is important to continually reflect on our work and understand how we can improve the way we serve our community and get the most out of the programs we run.

There were many positives of the program including the high percentage of people who went through to installation and some of the positive experience that people had with the information sessions and the installation.

There are also some areas that need attention and improvement for the second instalment of the Electric Homes Program planned for mid 2024. Through this survey we have gathered invaluable insights that will help guide us into the future and into offering more impactful electrification programs to our community. We extend our gratitude to all our partners and also to everyone who participated in this survey.