

California Water Heating Market Study: YouGov Incidence Survey

March 23, 2023

Instrument Information

Table 1 includes key characteristics about the instrument.

Table 1. Overview of Data Collection Activity

Descriptor	This Instrument
Instrument Type	Web survey
Estimated Time to Complete	5-10 minutes
Population Description	California Single Family Homeowners
Contact List Size	1500 Homeowners
Completion Goal(s)	150 Participants
Type of Sampling	Purposive <ul style="list-style-type: none"> • Homeowner in California • Replaced water heater in the last 2 years
Fielding Firm	YouGov

Instrument

Introduction

Thank you for participating in this survey. You will be asked questions about the water heater at your residence. To participate, you will need to take the survey on your mobile device, and you will be asked to take a picture on your device to upload to this survey platform. You will first see a screening section, and then the rest of the questions if you qualify for the survey.

S1. Do you want to participate in this survey?

1. Yes [PROCEED TO S6]
2. No [END SURVEY]

Screening [ASK ALL]

S2. What type of home do you own?

1. Mobile or manufactured home
2. Single family detached home
3. Single family attached home (e.g. row house, duplex)
4. Multifamily with 2-4 units (e.g. townhome, condo, etc.)

5. Multifamily with 5+ units (e.g. apartment, etc.)
6. Boat, RV motorhome, or camper
7. Auxiliar dwelling unit (ADU)
98. Other, please specify: [Open-ended response]
99. Prefer not to say

S3. How many residents live in your home year-round?

1. [NUMERIC DROP DOWN]

S4. What is the highest level of education you have completed?

1. Did not graduate from high school
2. High school graduate
3. Some college, but no degree (yet)
4. 2-year college degree
5. 4-year college degree
6. Postgraduate degree (MA, MBA, MD, JD, PhD, etc.)

S5. Over the last year, what was your family's annual income?

1. Less than \$10,000
2. \$10,000 - \$19,999
3. \$20,000 - \$29,999
4. \$30,000 - \$39,999
5. \$40,000 - \$49,999
6. \$50,000 - \$59,999
7. \$60,000 - \$69,999
8. \$70,000 - \$79,999
9. \$80,000 - \$99,999
10. \$100,000 - \$119,999
11. \$120,000 - \$149,999
12. \$150,000 - \$199,999
13. \$200,000 - \$249,999
14. \$250,000 - \$349,999
15. \$350,000 - \$499,999
16. \$500,000 or more
97. Prefer not to say

S6. Which of these technologies do you currently own?

1. Air Source Heat Pump
2. Ductless Mini-split Heat Pump
3. Ground Source Heat Pump
4. Heat Pump Water Heater
5. Heat Pump Clothes Dryer
6. Heat Pump Pool Heater
7. Solar PV
8. Electric Vehicle

- 98. I don't own any of these devices [MUTUALLY EXCLUSIVE]
- 99. Don't Know [MUTUALLY EXCLUSIVE]

[ASK IF S6 HAS MORE THAN ONE RESPONSE]

S7. Of the technologies you currently own, which one did you purchase first?

[DISPLAY ONLY OPTIONS SELECTED IN S6]

- 1. Air Source Heat Pump
- 2. Ductless Mini-split Heat Pump
- 3. Ground Source Heat Pump
- 4. Heat Pump Water Heater
- 5. Heat Pump Clothes Dryer
- 6. Heat Pump Pool Heater
- 7. Solar PV
- 8. Electric Vehicle
- 99. Don't Know [ALWAYS APPEARS]

[ASK ALL]

S8. Which of the following technologies do you plan to purchase in the next 3 years?

[DISPLAY ALL ANSWERS NOT SELECTED IN S6]

- 1. Air Source Heat Pump
- 2. Ductless Mini-split Heat Pump
- 3. Ground Source Heat Pump
- 4. Heat Pump Water Heater
- 5. Heat Pump Clothes Dryer
- 6. Heat Pump Pool Heater
- 7. Solar PV
- 8. Electric Vehicle
- 98. I do not plan to purchase any of these devices in the next 3 years [ALWAYS APPEARS] [MUTUALLY EXCLUSIVE]
- 99. Don't Know [ALWAYS APPEARS] [MUTUALLY EXCLUSIVE]

[ASK IF S8 HAS MORE THAN 1 RESPONSE]

S9. Of the following technologies you plan to purchase in the next 3 years, which one will be your first purchase?

[PIPE IN SELECTED S3 RESPONSES]

- 1. Air Source Heat Pump
- 2. Ductless Mini-split Heat Pump
- 3. Ground Source Heat Pump
- 4. Heat Pump Water Heater
- 5. Heat Pump Clothes Dryer
- 6. Heat Pump Pool Heater
- 7. Solar PV
- 8. Electric Vehicle

99. Don't Know [ALWAYS APPEARS]

S10. What type of water heating system do you use in your home?

1. Gas conventional storage tank water heater
2. Electric conventional storage tank water heater
3. Propane conventional storage tank water heater
4. Gas whole house tankless system
5. Electric whole house tankless system
6. Electric heat pump water heater
97. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

S11. What is the size of your main electric panel service? Your main electric service panel will typically be located on an exterior wall and will be close to the location of the electric meter from your utility company. The main circuit breaker will typically have a number on the actual switch itself which represents the service amps provided by the panel. The numbers are usually 100, 150, or 200, though they could be smaller or larger in some situations. The main service panel is typically a gray metal box mounted on the wall and it can be found on either the interior or exterior wall surface near your utility meter. Within your electric service panel, you will typically see two rows of circuit breakers side by side within the panel. The main circuit breaker, the breaker that powers the entire panel on or off, is usually located at the top or bottom of the individual circuit breakers located in your panel. The picture below shows an example of where you can locate your panel's service amps.



1. 100 amps
2. 150 amps
3. 200 amps
4. Other (please specify)

S12. Which of the following best describes you?

1. I am a homeowner
2. I am a renter

S13. [IF S1212=1] Have you replaced a water heater in your home in the past two years?

1. Yes
2. No
3. I don't know

S14. [IF S13=1] Do you know who replaced your water heater?

1. Yes
2. No

S15. What is the zip code of your home?

1. [5 digit numeric response]

[IF AND S12= 2, S13= 2/3, OR S15 IS NOT A CALIFORNIA ZIP CODE] "Thank you for your interest in this survey. Unfortunately, you do not currently qualify for participation. You will now be redirected." [END SURVEY]

[IF AND S12= 1,S1313=1, AND S1515 IS A CALIFORNIA ZIP CODE] Congratulations – you qualify for this survey! You will now be asked questions about your water heater replacement. Please answer each question to the best of your knowledge. If you are not sure about an answer, you can check information on your receipt or invoice from the replacement, correspondence with the installer, or the water heater itself. [PROCEED TO NEXT SECTION]

Homeowner Survey

Q1. What was the main reason you had this new water heater equipment installed? [Single RESPONSE]

1. Didn't have equipment at the time
2. Existing equipment failed completely
3. Existing equipment did not function well
4. Desire for the latest technology
5. It made financial sense
6. Desire to be more sustainable
7. Availability of discounts/rebates on equipment/appliances
8. A contractor recommended upgrading
97. Other, please specify: [OPEN END]

Q2. To the best of your knowledge, what type of water heater was your *old* water heater that you replaced? [SINGLE RESPONSE]

1. Gas conventional storage tank water heater
2. Electric conventional storage tank water heater
3. Propane conventional storage tank water heater
4. Gas whole house tankless system
5. Electric whole house tankless system
6. Electric heat pump water heater
97. Other, please specify: [OPEN-ENDED RESPONSE]

98. Don't know [MUTUALLY EXCLUSIVE]

Q3. To the best of your knowledge, which type of water heater is your *new* water heater? [SINGLE RESPONSE]

1. Gas conventional storage tank water heater
2. Electric conventional storage tank water heater
3. Propane conventional storage tank water heater
4. Gas whole house tankless system
5. Electric whole house tankless system
6. Electric heat pump water heater
97. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

Q4. Approximately how much did your water heater replacement cost including parts and labor? [EXCLUSIVE RESPONSE]

1. Less than \$1,000
2. \$1,000-\$1,999
3. \$2,000-\$2,999
4. \$3,000-\$3,999
5. More than \$4,000
6. I can't recall

Q5. Who installed the new water heating equipment? [EXCLUSIVE RESPONSE]

1. A professional
2. A handyman
3. I installed it myself
4. A friend of a family member
97. Other, please specify: [OPEN-ENDED RESPONSE]
98. Don't know

[IF Q5=3, SKIP TO CLOSING]

Q5A. What was the name of the installer?

1. [Open-ended response]

Q5B. How did you find the installer?

1. Prior experience with the contractor or their company
2. Through a utility website
3. Through The Switch is On find a contractor tool
4. Recommendation from friend, family, neighbor, etc.
5. General web-search, Google, Yelp
6. From a retailer (Costco, Home Depot, etc.)
97. Other, please specify: [TEXT]

Q5C. Please provide your installer's contact information.

1. [Open-ended response]

Q5D. Your hot water heater should have sticker that has your installer's information. Please take a picture of your hot water heater that shows this sticker. Please make sure that the picture is clear, and the sticker is readable. Here is an example of a good picture:



1. [TAKE PICTURE/UPLOAD FROM DEVICE]

Closing [ASK ALL]

Thank you for taking the time to complete our survey. We appreciate your input!

[WEB SURVEYS: REDIRECT TO URL]