ENERGY CONSUMERS AUSTRALIA

The Consumer Energy Report Card

HOUSEHOLD RESEARCH REPORT – SPRING 2025

Background and objectives

Energy Consumers Australia (ECA) is the national voice for both household and small business energy consumers. ECA works with consumers to ensure they have their values, expectations and needs met through a modern, flexible and resilient energy system.

SEC Newgate conducted surveys for ECA in Spring 2024 and Autumn 2025. This third wave was fielded in Spring 2025, and aims to understand:

- The priorities and values of Australian energy consumers
- Energy affordability
- Levels of energy literacy
- Engagement with the energy system and the relationship they want to have with it
- Attitudes to the transition to renewables
- Technology utilisation and specific behaviours to minimise energy use
- Consideration and use of different types of passenger vehicles, including hybrid and fully electric vehicles.

The study is repeated every 6 months to provide an ongoing measure of consumer attitudes.

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This report was prepared by Peter Collingridge and Aaron Merhab at SEC Newgate.

Research methodology

Fieldwork dates

3rd – 21st October 2025

Online survey

Participants sourced from a professional ISO-accredited online market research panel.

Representative sample

n = 4,535 residential energy decision makers across Australia

The large total sample size of 4,535 is associated with an overall margin of error of +/- 1.5% at a 95% confidence interval. As detailed in the following slide it provides a robust sample size for each Australian state and territory, as well as for other key consumer segments.

The target of the survey was Australian adults who are responsible for paying energy bills and/or choosing energy products and services for their household.

Data was weighted according to 2021 Census population statistics on age, gender, area, and highest level of education. It was adjusted to take into account that energy decision makers have a slightly different age and gender profile than that of the broader population.

Sample profile

	Total (n)
Total sample	4,535
Gender	
Male	2,214
Female	2,305
Another gender	16
Age	
18-24	290
25-34	838
35-49	1,232
50-64	1,120
65+	1,055

	Total (n)
Area	
Metro	2,769
Regional	1,766
NSW	1,002
VIC	1,006
QLD	805
SA	604
WA	605
TAS	201
ACT	206
NT	106
Financial status	
Doing well / okay	3,111
Having difficulty	1,424

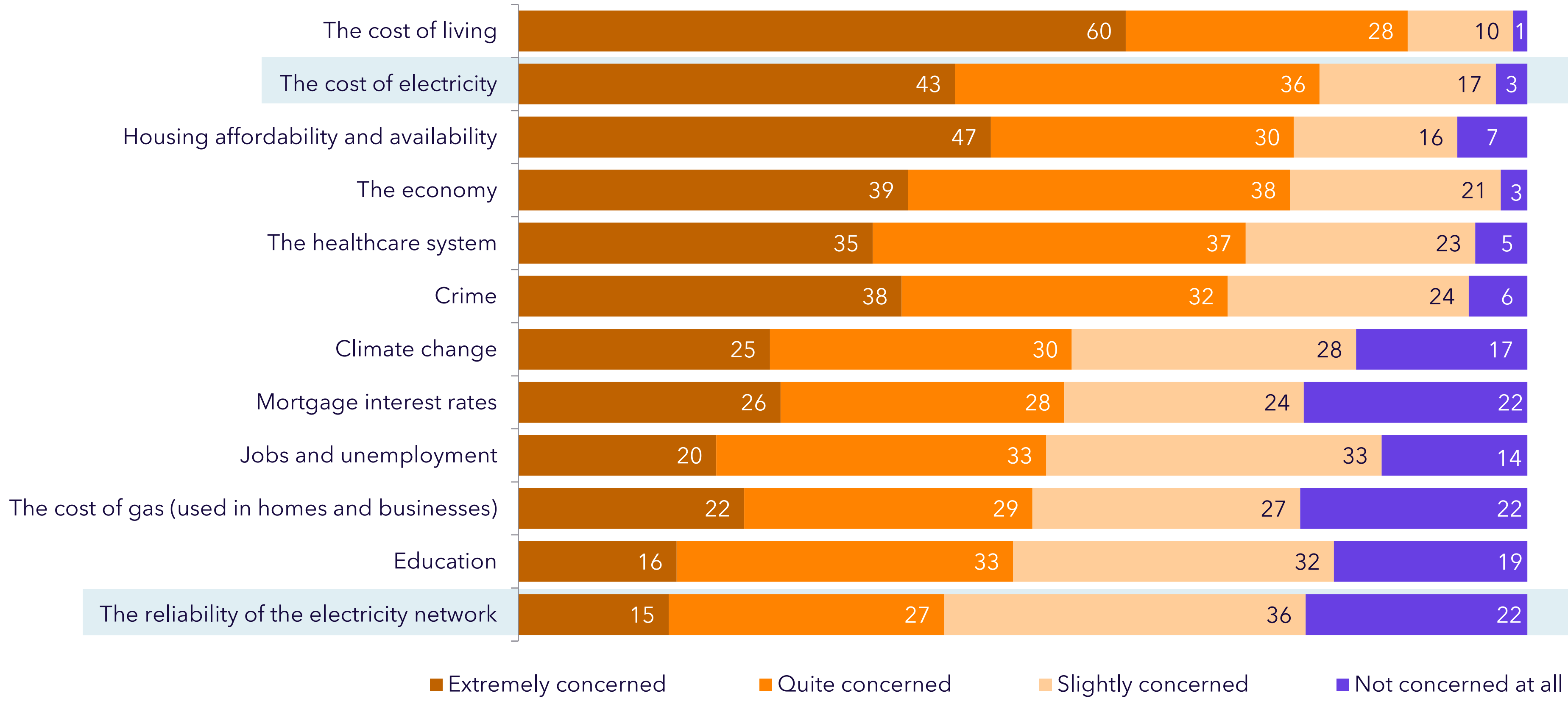
	Total (n)
Housing type	
Freestanding house	3,138
Other	1,397
Home ownership	
Renting	1,428
Own/Mortgage	3,025
Other	82
Rooftop solar	
Yes	1,555
No	2,980
CALD	
Prefer to speak a language other than English at home / with close friends	596

Issues context, attitudes and interest in energy

Contextual issues and concerns

The cost of electricity remains of large concern to most households, with 79% extremely or quite concerned. Only 42% are concerned about the reliability of the electricity network.

Concern about specific issues (%)



TOTAL EXTREMELY / QUITE CONCERNED (%)

	SPRING 2024	AUTUMN 2025	SPRING 2025
The cost of living	90	90	88
The cost of electricity	81	78	79
Housing affordability and availability	79	77	77
The economy	79	82	76
The healthcare system	77	72	72
Crime	70	69	70
Climate change	57	55	55
Mortgage interest rates	62	56	54
Jobs and unemployment	54	51	52
The cost of gas (used in homes and businesses)	60	49	51
Education	50	50	49
The reliability of the electricity network	48	43	42

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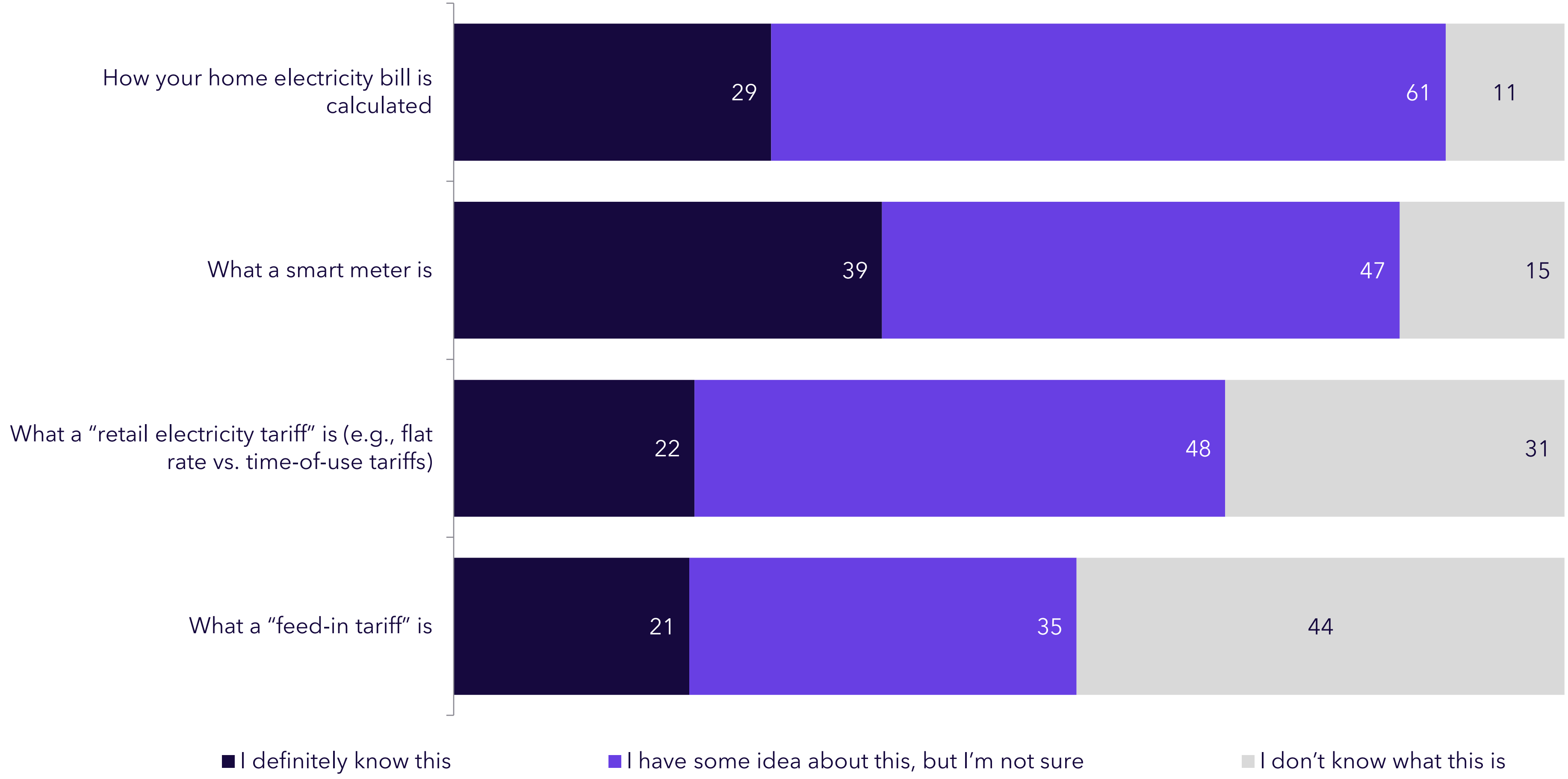
Q11. How concerned, if at all, are you with the following issues?
Base: Total (n=4,535)

Numbers in blue font indicate the result is statistically significantly higher than the result of those in the previous wave. Numbers in red font indicate the result is statistically significantly lower

Electricity literacy

Electricity bill literacy is relatively low overall, with only three in ten saying they 'definitely know' how their electricity bill is calculated. Those experiencing financial difficulty were less likely to have an understanding of electricity terms and billing.

Level of understanding (%)



TOTAL KNOW ABOUT IT (%)

	AUTUMN 2025	SPRING 2025
How your home electricity bill is calculated	88	89
What a smart meter is	86	85
What a "retail electricity tariff" is (e.g., flat rate vs. time-of-use tariffs)	69	69
What a "feed-in tariff" is	56	56

Q14. How much do you know about the following things?
Base: Total (n=4,535)

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Preferred relationship with Australia's electricity system

More households say they want a "basic relationship" (58%) with Australia's energy system.

58%

WANT A BASIC RELATIONSHIP

(+4% VS AUTUMN 2025)

42%

WANT AN ACTIVE RELATIONSHIP

(-4% VS AUTUMN 2025)

For you, electricity is a basic service and all you really want is:

- Getting a good price for electricity you use (or export if you have solar)
- Having a reliable electricity supply
- Having good customer service from your supplier

You want more than just a basic service, and this includes things like:

- Having a choice of different tariffs to choose from (e.g. paying different prices at different times of day depending on when you use energy).
- Being able to monitor your energy use in real time and adjust your usage throughout the day to save money
- If you have solar and batteries, and/or electric vehicles, being able to choose when you store or export your energy to the grid
- Having various clean energy options to choose from (e.g. green power or carbon neutral plans)

TOTAL (%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Want a basic relationship	58	57	58	62	52	58	60	59	57	54	54	55	56	54	50	61
Want an active relationship	42	43	42	38	48	42	40	41	43	46	46	45	44	46	50	39

Q16. And which of the following best characterises the type of relationship that you would like to have with Australia's electricity system?
Base: Total (n=4,535)

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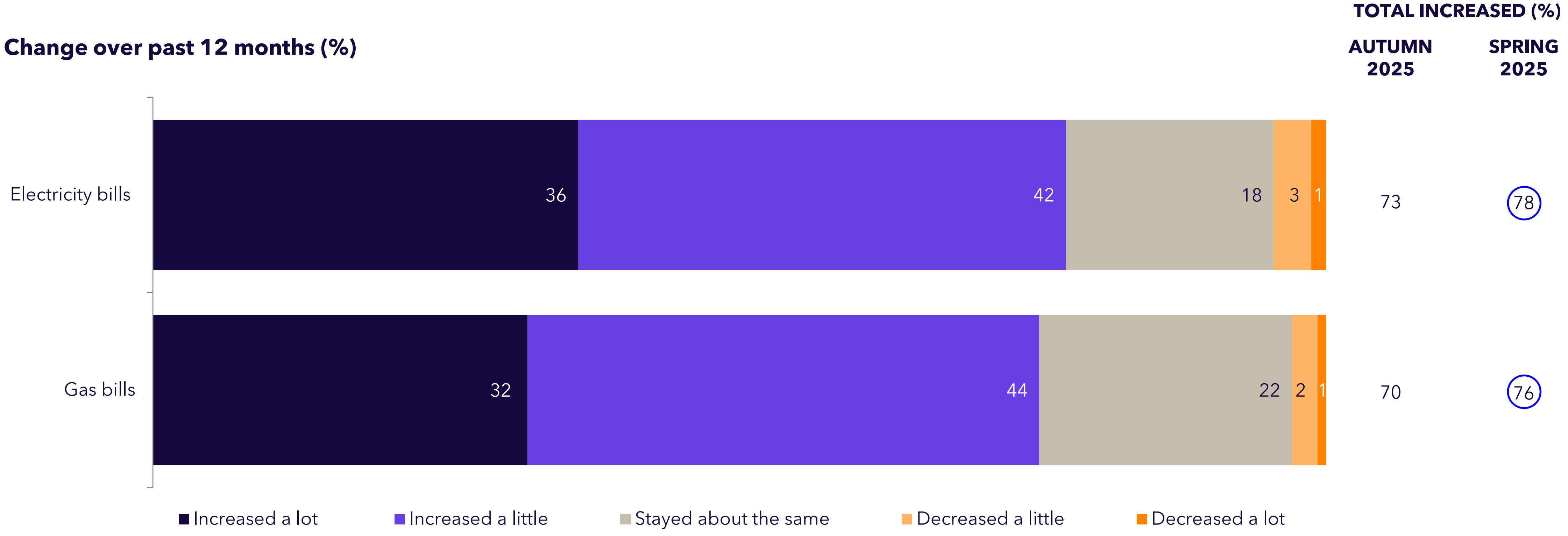
Energy affordability

Change in bill costs over the last 12 months

Almost 8 in 10 believe that their electricity or gas bills have increased over the last 12 months, which is an increase from earlier in the year.



TOTAL INCREASED (%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Electricity bills	78	77	79	74	80	78	78	81	77	80	75	68	73	82	77	78
Gas bills	76	75	76	65	76	81	74	80	71	82	66	61	71	100	77	75

Q31a. Over the past 12 months, did the following bills increase, decrease or stay about the same?
Base: Total (n=4,535), have piped gas (n=2,552)

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Ease or difficulty in affording home electricity and gas bills

About a third of households are finding it difficult to pay their home electricity or gas bills.

Ease or difficulty in paying my electricity and gas bills in the last 6 months (%)

	AUTUMN 2025 TOTAL EASY (%)	AUTUMN 2025 TOTAL DIFFICULT (%)	SPRING 2025 TOTAL EASY (%)	SPRING 2025 TOTAL DIFFICULT (%)
Electricity bill	65	35	64	36
Gas bill	70	30	67	33

TOTAL (%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Electricity bill - easy	64	69	59	65	61	65	61	64	67	60	66	65	76	51	70	61
Electricity bill – difficult	36	31	41	35	39	35	39	36	33	40	34	35	24	49	30	39
Gas bill – easy	67	71	62	69	65	66	67	61	70	64	75	84	75	66	72	64
Gas bill - difficult	33	29	38	31	35	34	33	39	30	36	25	16	25	34	28	36

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Q32. In the last 6 months, how easy or difficult has it been for you to pay each of the following?
Base: Have electricity retailer (n=4,477), Have piped gas (n=2,552)

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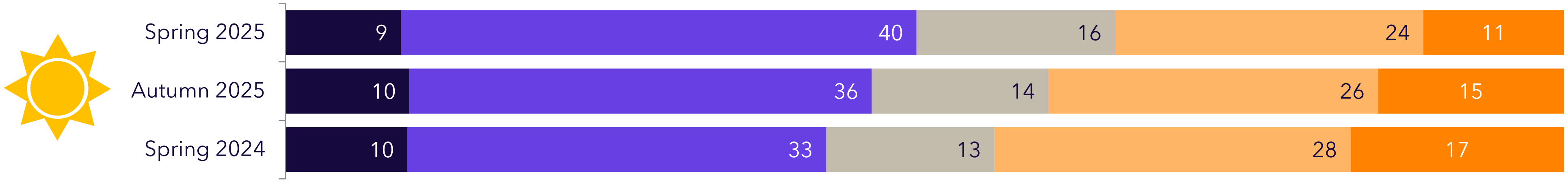
Ease of keeping the home at a comfortable temperature

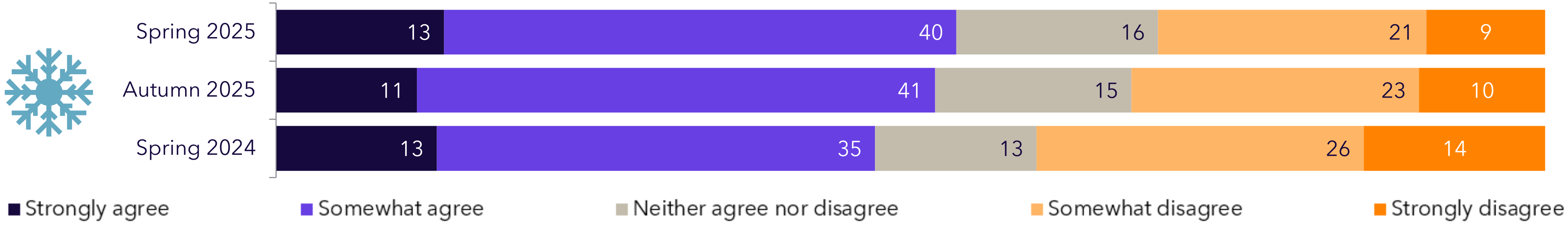
Only 54% agree they can keep their home at a comfortable temperature on cool days without having to use a lot of energy. Slightly fewer (49%) say the same when it comes to hot days.

On hot days you can keep your home at a comfortable temperature without having to use a lot of energy (%)



	TOTAL AGREE (%)	TOTAL DISAGREE (%)
Spring 2025	49	35
Autumn 2025	46	40
Spring 2024	42	45

On cold days you can keep your home at a comfortable temperature without having to use a lot of energy (%)



	TOTAL AGREE (%)	TOTAL DISAGREE (%)
Spring 2025	54	31
Autumn 2025	52	33
Spring 2024	47	40

TOTAL AGREE 2025 (%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Hot days can keep home at comfortable temperature	49	51	47	44	48	53	48	49	49	47	54	62	54	42	55	47
Cold days can keep home at comfortable temperature	54	56	51	55	52	54	52	45	68	54	56	51	45	64	59	51

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Q50. Do you agree or disagree with the following statements?
Base: Total (n=4,535)

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Switching energy providers and plans

Ability to choose electricity supplier

Most households who live in an area with multiple electricity retailers say they have the ability to choose their supplier (89%). Only a small number (8%) say their electricity supplier is chosen by their strata or residential management company, while very few (1%) say their electricity is all generated off-grid.

Ability to choose (%)

(%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Can choose their own electricity supplier	89	88	89	78	89	94	90	87	88	91	-	89	86	-	93	87
Their electricity supplier is chosen by either strata or residential management companies	8	9	8	17	8	4	7	10	9	5	-	5	12	-	4	10
Their electricity is all generated off grid	1	1	1	3	1	1	2	1	1	2	-	2	1	-	2	1

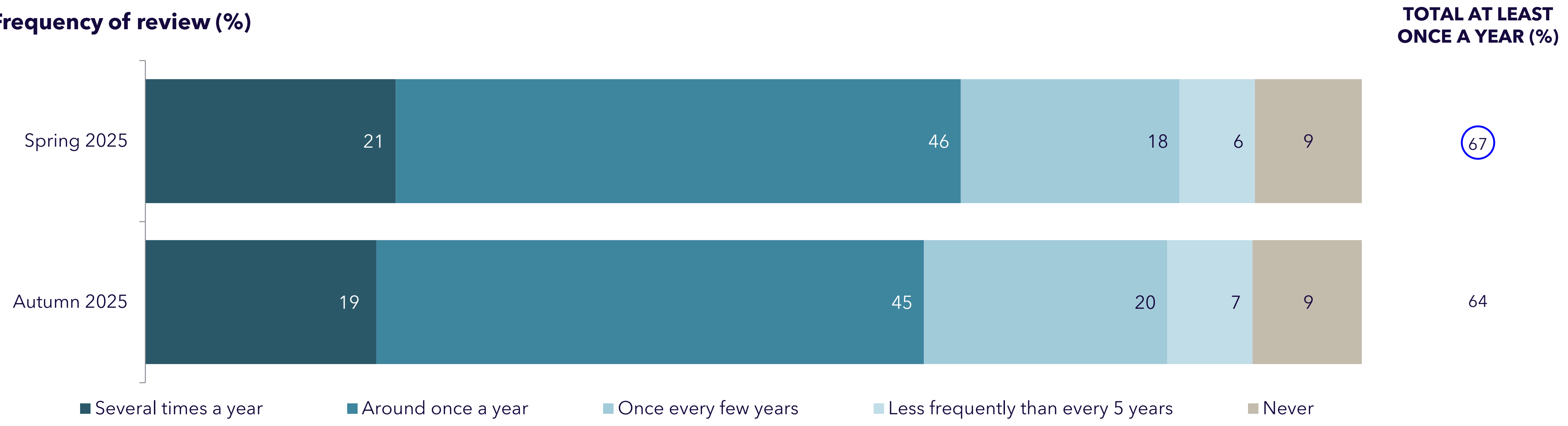
A11. Which of the following best describes your ability to choose your electricity supplier?
Base: Those who live in a competitive retailer area (n=3,553)

Numbers in blue font indicate the result is statistically significantly higher than the result of those not in the group. Numbers in red font indicate the result is statistically significantly lower

Frequency of reviewing household energy plans

Around two thirds of households review their energy plan at least once a year, while around a quarter review it less than once a year. Nearly one in ten households say never review their household's energy plan.

Frequency of review (%)



TOTAL (%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Several times a year	21	23	18	17	20	23	23	21	19	16	-	16	14	-	26	18
Around once a year	46	46	47	45	47	47	46	47	45	50	-	29	49	-	47	46
Less than once a year	24	22	26	27	25	23	22	25	25	24	-	33	29	-	21	26
Never	9	8	9	11	8	8	9	6	10	10	-	22	8	-	5	10

Q70. Approximately how often do you review your current household energy plan and investigate whether there are better options for you? Base: Those living in a competitive retailer area (n=3,553)

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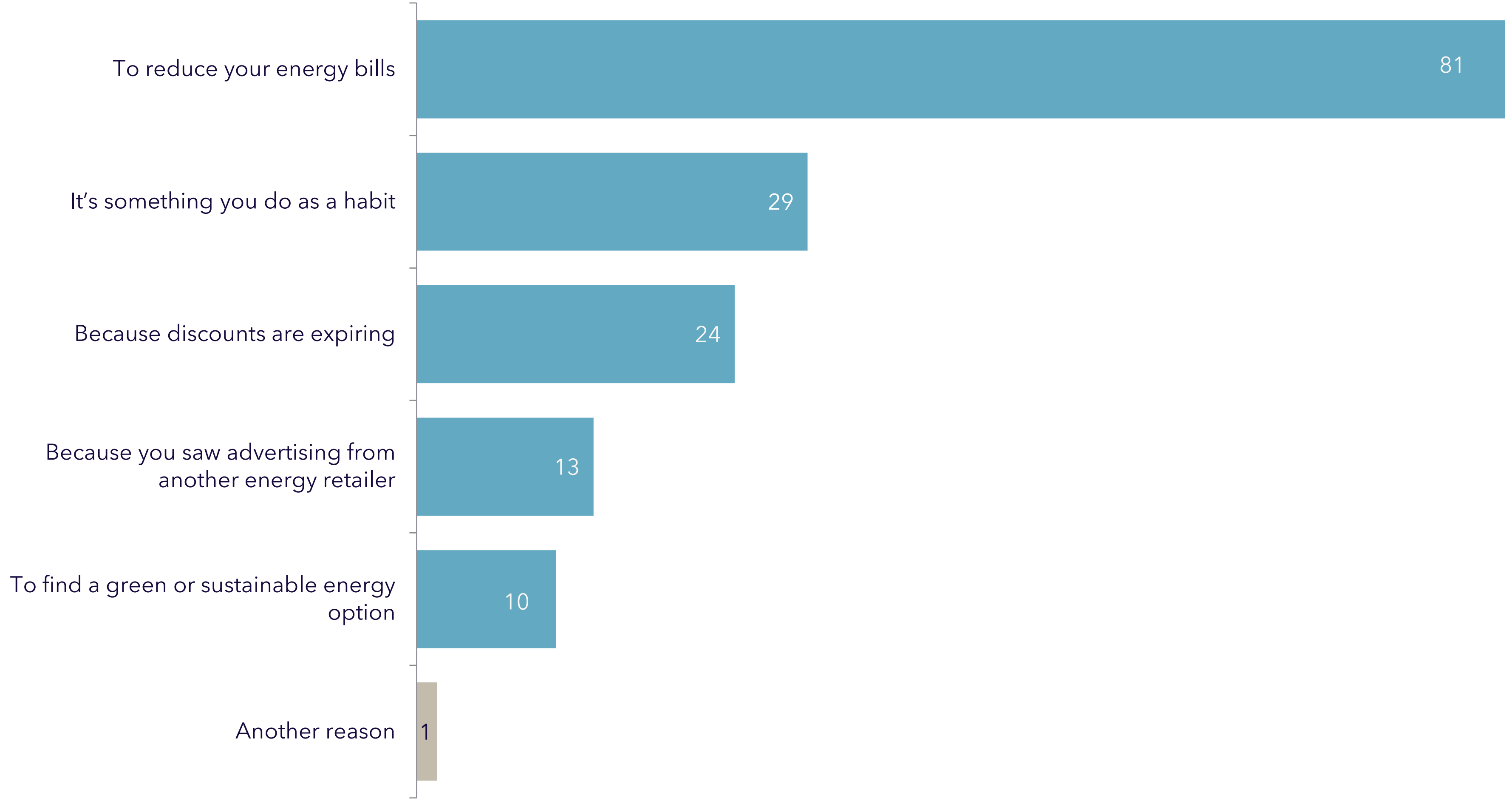
Reasons for frequently reviewing energy plans

The most common reason by far for regularly reviewing energy plans was reducing energy bills (81%). This was followed by it being a habit (29%) and due to expiring discounts (24%).

Reasons for regularly reviewing energy plan (% choosing each reason)

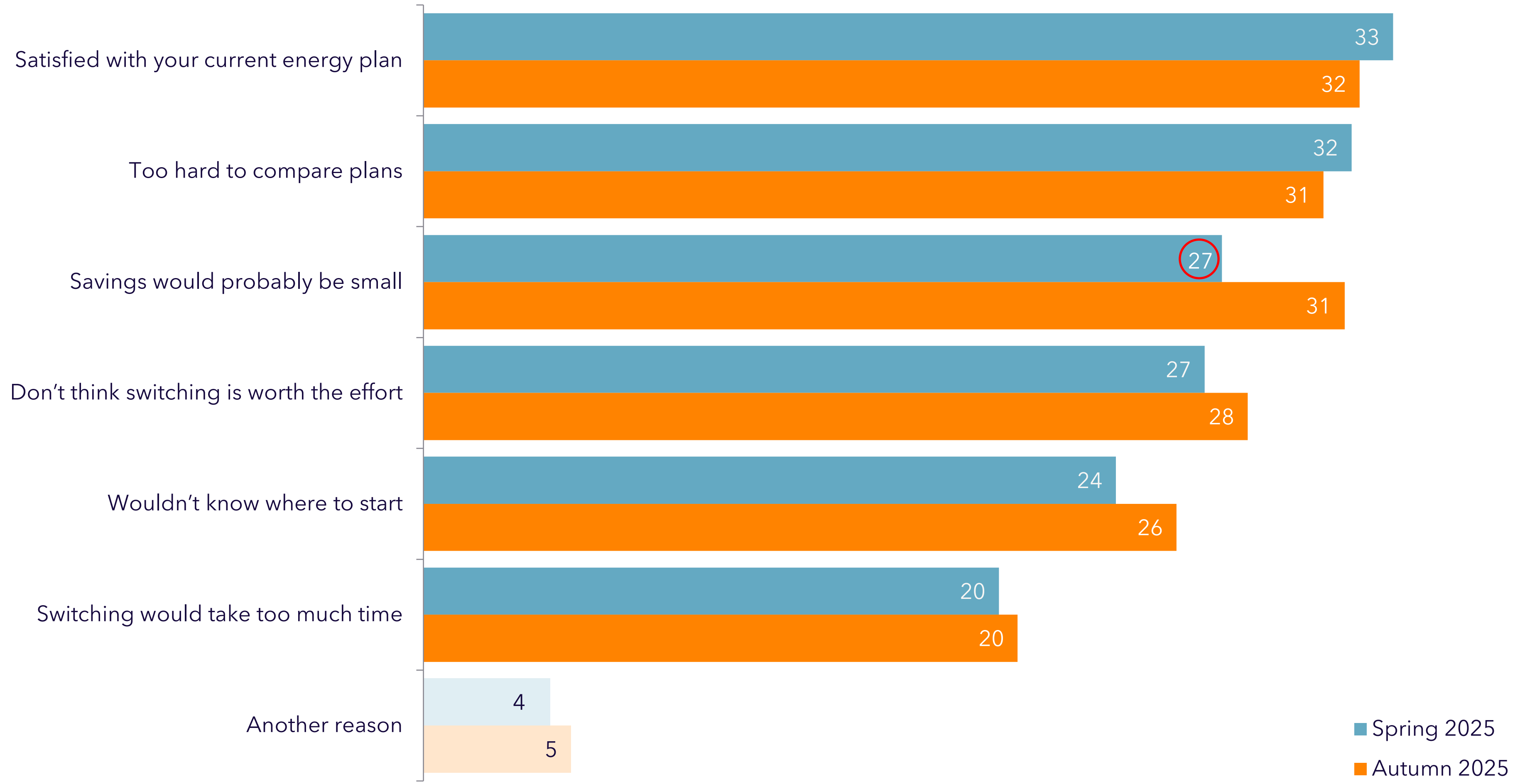


Q73b. Which of the following, if any, are reasons why you regularly review your energy plan?
Base: Review energy at least once a year (n=2,177)

Reasons for not regularly reviewing energy plans

Only one in three households say they do not review their electricity plans regularly because they are satisfied with their current plan.

Reasons for not regularly reviewing energy plan (% choosing each reason)



Q73a. Which of the following, if any, are reasons why you don't regularly review your energy plan?
Base: Review energy plan less than once a year (n=964)

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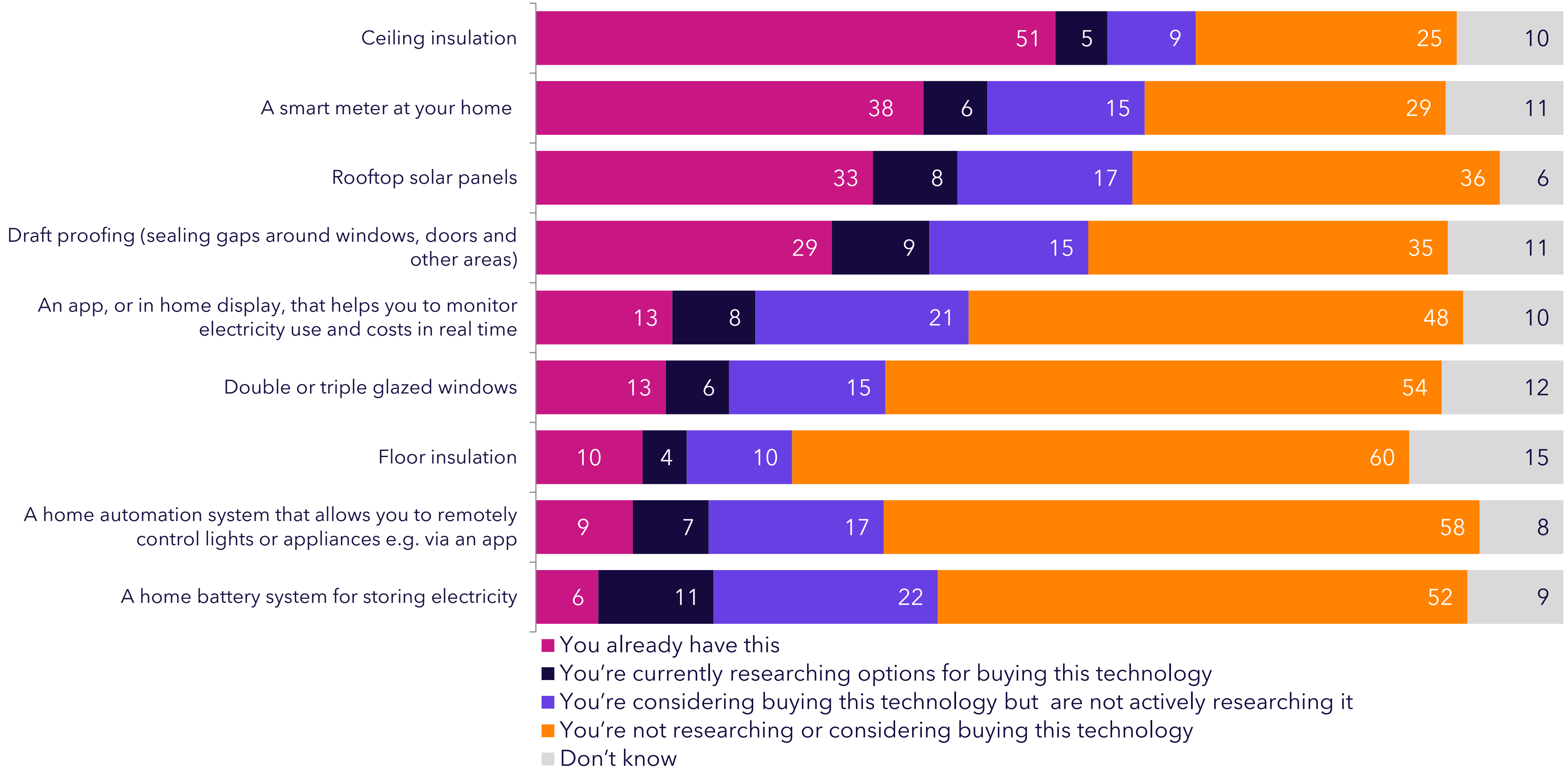
Household technologies and appliances

Use and consideration of household appliances and technologies

Around four in ten have smart meters (38%), or rooftop solar (33%), with a further quarter considering or researching solar. Use of other technologies is lower although there is reasonable consideration of in-home energy monitoring apps and home battery systems. At the same time, consideration of in-home energy monitoring apps has fallen 3% from Autumn this year.

Currently have or are considering (%)



CHANGE SINCE AUTUMN 2025

	HAVE THIS	RESEARCHING/ CONSIDERING
Ceiling insulation	+2	-1
A smart meter at your home	+4	-1
Rooftop solar panels	0	-1
Draft proofing (sealing gaps around windows, doors and other areas)	0	+2
An app, or in home display, that helps you to monitor electricity use and costs in real time	+1	-3
Double or triple glazed windows	+1	+1
Floor insulation	-1	+1
A home automation system that allows you to remotely control lights or appliances e.g. via an app	+1	0
A home battery system for storing electricity	+1	+1

Q51a. Does your home have, or are you considering, any of the following technologies?
Base: Total (n=4,535)

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Vehicles owned

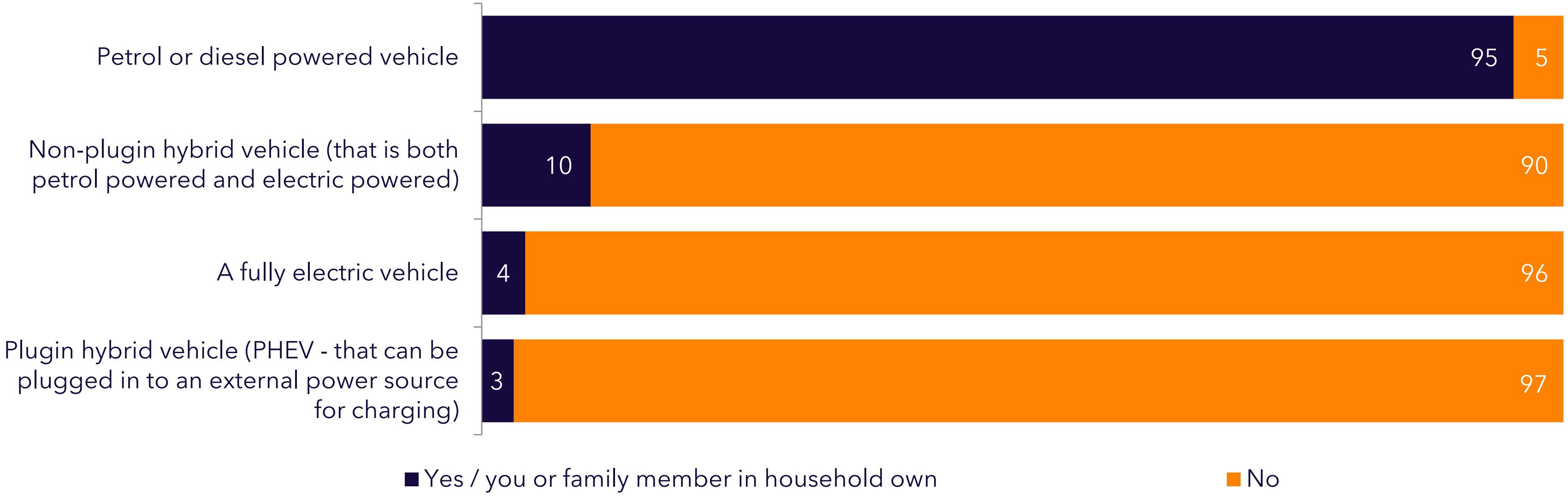
1.7 vehicles are owned per household on average, with a strong majority of these being petrol or diesel powered vehicles, ahead of standard hybrids (10%), fully electric (4%) or PHEV (3%) vehicles.

ON AVERAGE

1.7

vehicles owned per household

Vehicle type owned (% among those with 1 or more vehicle)



TOTAL (%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Petrol or diesel powered vehicle	95	95	96	95	95	96	95	95	95	95	96	95	98	99	95	95
Non-plugin hybrid vehicle	10	12	8	15	10	8	11	11	8	8	9	9	16	7	10	10
A fully electric vehicle	4	5	3	8	4	2	5	4	4	3	3	3	3	4	6	3
Plugin hybrid vehicle	3	4	2	6	3	1	4	3	1	2	3	4	9	3	3	3

Q200. In total, how many cars or passenger vehicles cars are owned by you or a family member in your household?
Base: total (n=4,535)
Q201. Which of the following do you or a family member in your household have?
Base: Those with 1 or more vehicle in household (n=4,292)

Numbers in blue font indicate the result is statistically significantly higher than the result of those not in the group. Numbers in red font indicate the result is statistically significantly lower

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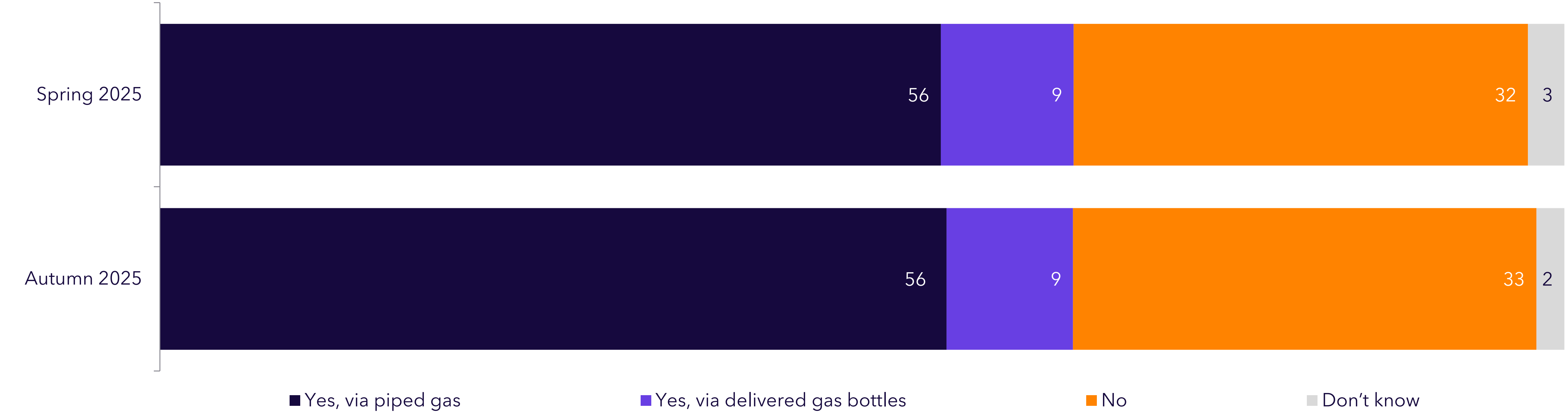
Gas & electrification trends

Gas use in the home

A little over half (56%) have piped gas at home, while a further 9% have gas bottles delivered. Piped gas is most prevalent in Victoria, Western Australia, ACT and South Australia, while bottled gas is more common in Queensland and the Northern Territory.

Home gas connection (%)



(%)	TOTAL	MEN	WOMEN	18-34	35-49	50+	NSW	VIC	QLD	SA	WA	TAS	ACT	NT	HAVE SOLAR	NO SOLAR
Yes, via piped gas	56	56	55	57	59	53	53	83	15	63	78	15	66	8	53	57
Yes, via delivered gas bottles	9	9	10	9	9	10	8	3	21	8	9	14	2	33	14	7
No	32	33	32	26	30	37	35	13	61	27	12	70	30	55	32	32

A12. Is your home currently connected to gas?
Base: Total (n=4,535)

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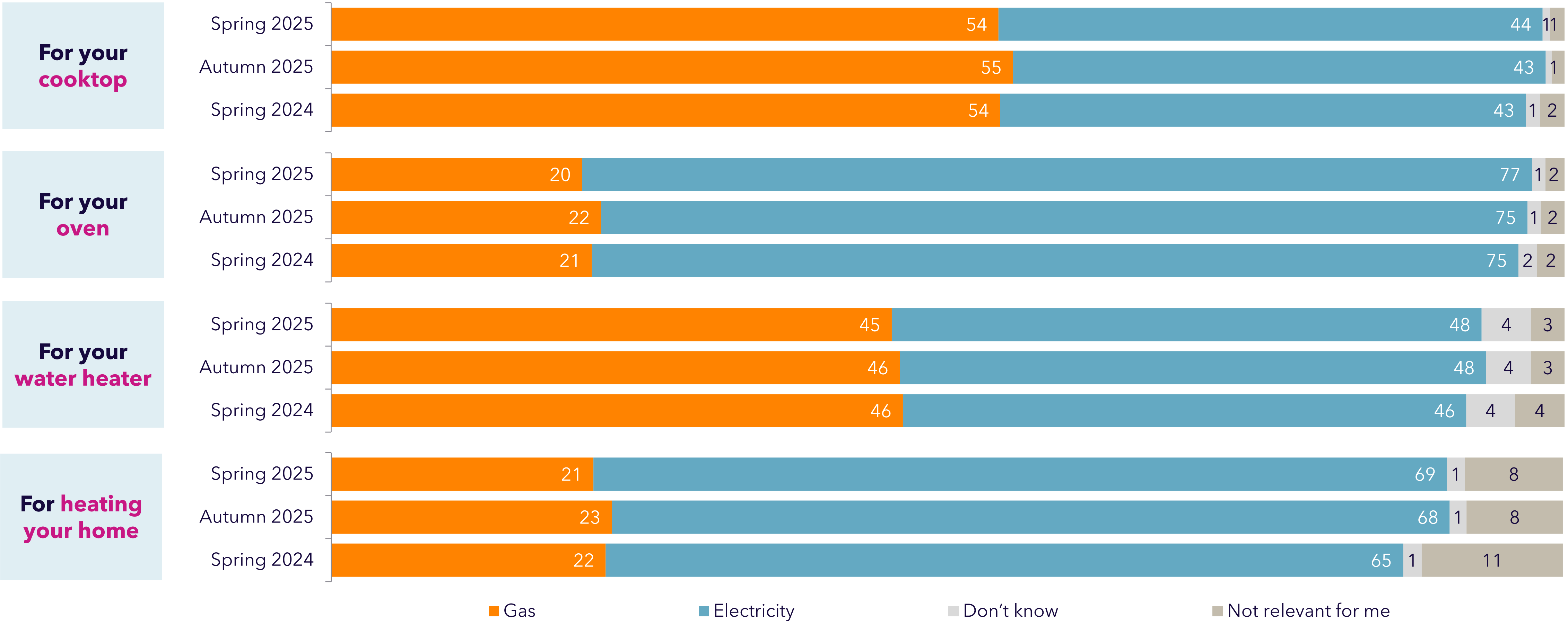
Energy sources used at home

Cooktops are most likely to be gas powered (54%). Water heaters are evenly split between gas (45%) and electricity (48%), while electricity is the most common energy source for ovens (77%) and heating (69%).

Energy source used at home for the following things (%)



A13. Do you currently use gas or electricity for the following things at your home?
Base: Total (n=4,535)

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