Household Energy Consumer Information Research

November 2023

Who likes thinking about energy? No one.

We commissioned a representative national survey of 2500 household energy consumers and found that 50% of them haven't even begun looking for information on energy. Those who are looking are finding it hard to get the information they need – and it's not coming from sources they trust.

Here's why that matters.

The AEMO's Integrated System Plan assumes that by 2050 almost all households will have made the switch to an electric vehicle, electric heating, hot water and cooking, and almost two-thirds of detached homes will have rooftop solar and potentially a battery. The energy transition will rely on consumers' energy resources, choices and behaviour. We're asking a lot of consumers – and we're assuming they will somehow know what they need to do and will take action.

This research shows that many consumers do not even have the basic information they need to manage their energy use, and the absence of clear, trusted and practical advice is leaving them lacking the confidence to act and lacking trust in the energy market.

We're also assuming they have the agency to act.

We often forget that only 52% of Australian households are owner-occupied, stand-alone homes while the other half must negotiate home upgrades with other tenants, flatmates and landlords. As our previous research *Stepping Up* found – and this new research backs up – people on low incomes, people who live in apartments, and renters face barriers to reducing their energy use and to making the changes necessary for an all-electric energy efficient home.

That's the bad news. Now for some hope...

ENERGY CONSUMERS AUSTRALIA

Who likes using less energy and saving money? Almost everyone.

Almost all (89%) household energy consumers are interested in learning more about ways to reduce their energy use and costs. Amid cost-of-living pressures and high energy prices most consumers (81%) have taken some steps to reduce their energy usage and costs – but they aren't the steps that offer 'the best bang for buck'.

The research also found there are far more similarities among consumers across Australia than there are differences. Consumers are split by motivation, ability to act, confidence in their agency, and by their levels of concern, not by which state and territory they live in. From these discoveries, we've been able to build an actionable segmentation model.

The answer: right information, at the right time, from the right sources.

The research shows most consumers are at 'first base' on their energy journey. There is a need for simple, clear communications on the easy, high impact steps consumers can take to reduce their energy use and costs.

It also reveals that consumer advocacy organisations such as ECA and CHOICE are the most trusted sources of information about energy and/or ways to reduce energy bills for household consumers. Federal and state governments are second and third most trusted.

We now know where consumers are on the journey – and who they trust to tell them how to get there. So what next?

ENERGY CONSUMERS AUSTRALIA

Consumers will act if they get the right help

We began this project thinking about what would make a successful energy information campaign to help consumers lower their bills. What the research has shown us is more fundamental: many consumers will need significant coordinated help to navigate the energy transition.

Information campaigns are only part of what will be needed to get consumers to the stage that the ISP assumes they will reach in 2050.

We need consumers to be the heroes of Net Zero, and to do that they need us to help them by communicating clearly on ALL the things they need to do to have a smooth journey.

The results show the need for a ‘one-stop-shop’ for energy information and advice for Australian households.

Consumers need certainty and they need support to make the right decisions. And they need a trusted voice to help step them through what they need to do.

THE INSIGHT CENTRE

Household Energy Consumers Communications Research

November 2023

Contents

THE INSIGHT CENTRE

Key findings

This Household Energy Consumer Research is based on a nationally representative survey of 2,500 household energy decision makers.

The research found many energy consumers are struggling to find the information that they need to make informed decisions about their household energy use.

Despite high levels of concern about rising energy bills, half of household energy consumers had not actively searched for information that may assist them.

Those who had searched often found the information was not relevant to their circumstances or was difficult to understand.

While many household energy consumers reported taking steps to reduce their energy use, when prompted with a list of potential actions, even the most frequently undertaken actions were only being done by around 50% of energy decision makers.

Most of those surveyed were only taking a small number of the potential actions open to them – and the actions they were taking were not necessarily the most effective actions for reducing their energy use.

The results suggest many consumers would benefit from learning about, or being reminded, of the easy to do, no cost actions that could help them reduce their energy use and costs.

THE INSIGHT CENTRE

Trusted information sources

Household energy consumers reported that the information about energy they were receiving was often not from organisations or channels that they have high levels of trust in.

Trust was high in consumer advocacy organisations as a source of information about ways to reduce energy use and cost.

Of the consumers that had looked for information on reducing their energy use and bills, many did not find it easy to find the information they were looking for (43%) and for many the information they could find was neither relevant nor easy to understand.

Approximately half didn't recall hearing or seeing any communications or media related to energy and/or ways to reduce energy consumption in the last 12 months. Of those who did, the majority reported seeing it on free to air TV or on the internet.

State/territory analysis

The research found that the information that is of most interest to household energy consumers, and the barriers that need to be overcome, did not differ substantially based on the state/territory where someone lived.

Perceptions that it costs too much to make changes, that there is nothing more that can be done to reduce energy use, or a lack of knowledge about what else could reduce energy use further remain the top barriers irrespective of state/territory.

We have, however, identified within the report where there were differences that indicate a higher level of information need or barrier to act based on a higher likelihood to provide a specific response.

For example, decision makers in NSW indicated a higher level of interest in knowing how to get the most out of their solar system. While in Victoria the impact of buying an electric vehicle on household energy use and how to plan for an all-electric home were seen as more important.

Building the baseline knowledge

The research confirms the importance of ensuring that energy consumers have the basic knowledge from which to build understanding of what they can do now and how they should respond in the future.

At present, it is not clear to many energy consumers where they should focus to obtain the highest impact for the least effort. Many do not have the basic information to manage their energy use and the absence of clear, trusted and practical advice means they lack the confidence to act.

This information is important in building motivation to act.

The level of interest in the topic areas provides a natural sequence to consider in communications. The low barrier actions that deliver a reasonably high pay off will provide baseline level of knowledge to build on.

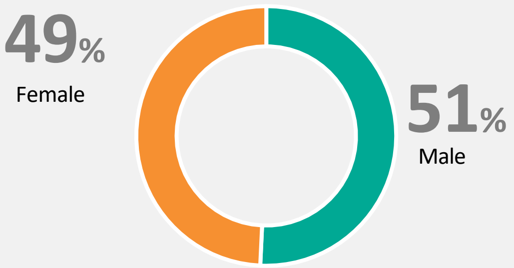
Topics with the highest level of interest were how different energy use patterns and major appliances contribute to their energy bill, saving money by managing electricity use during peak and off-peak hours and the impact on their bill of changes to their heating/cooling temperature settings.

There is a need for simple, clear communications on specific energy saving measures coupled with their impact in reducing energy use and costs.

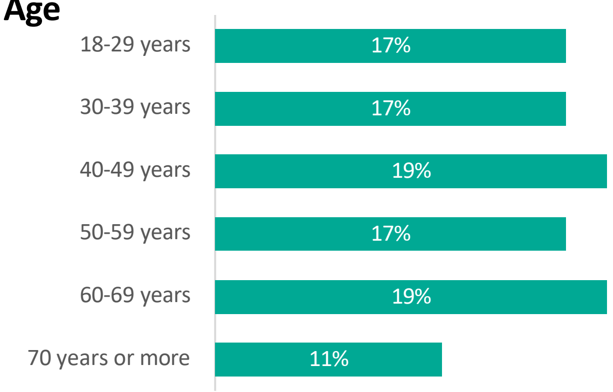
THE INSIGHT CENTRE

Sample

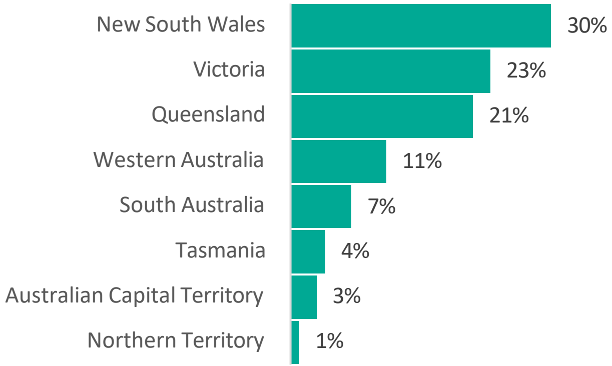
Gender



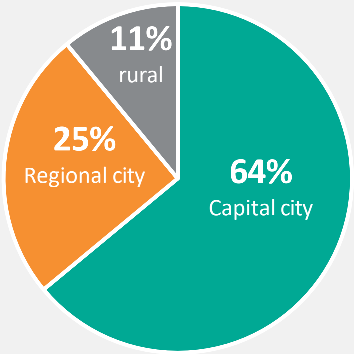
Age



Region

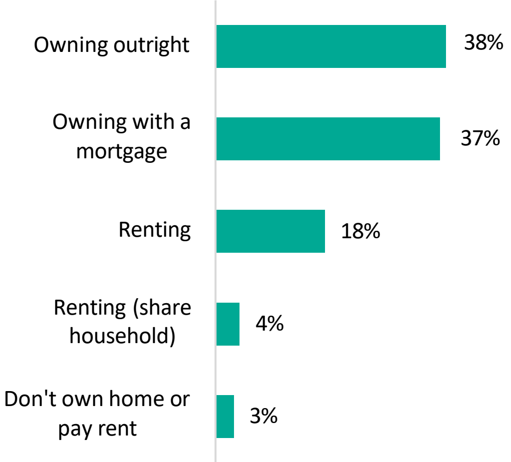


Area

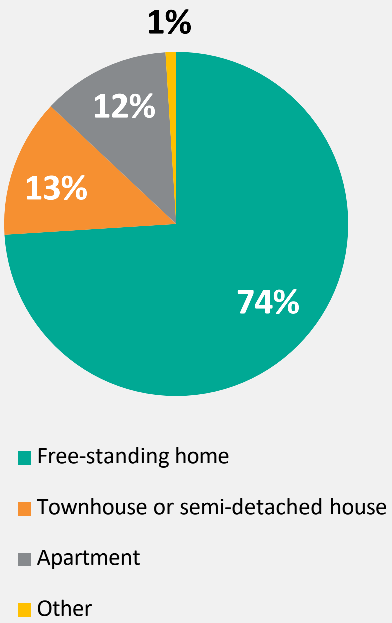


Sample

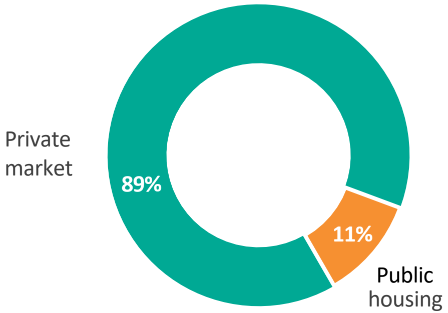
Ownership/rental status



Residence building type

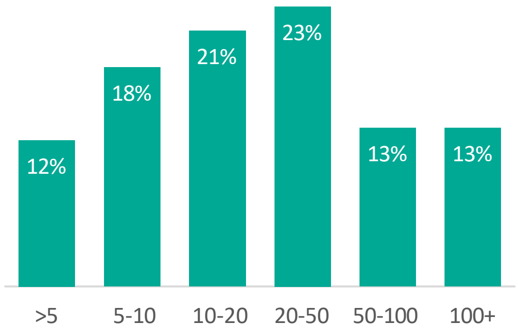


Type of rental



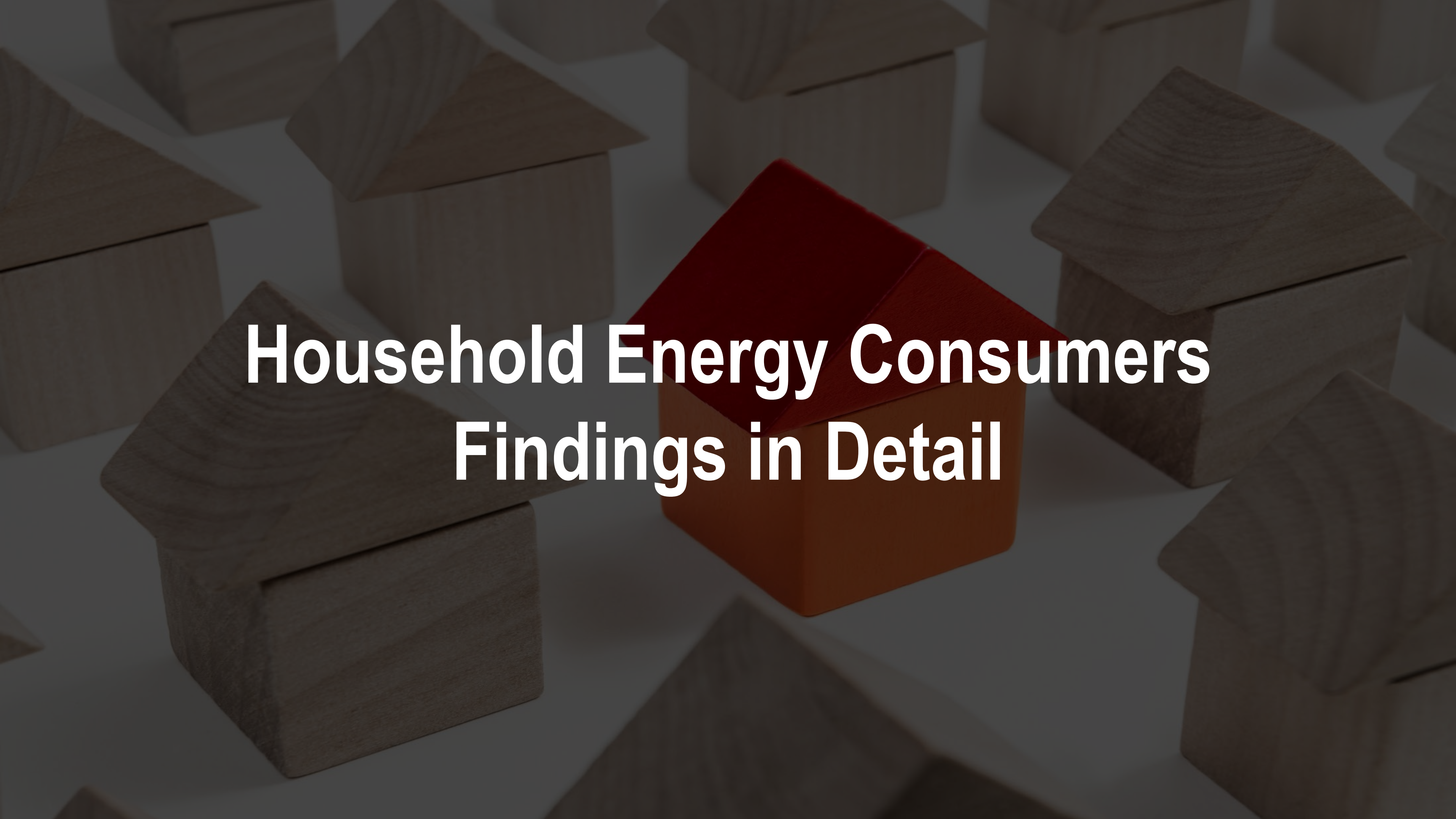
Base: Renters

Apartment complex size



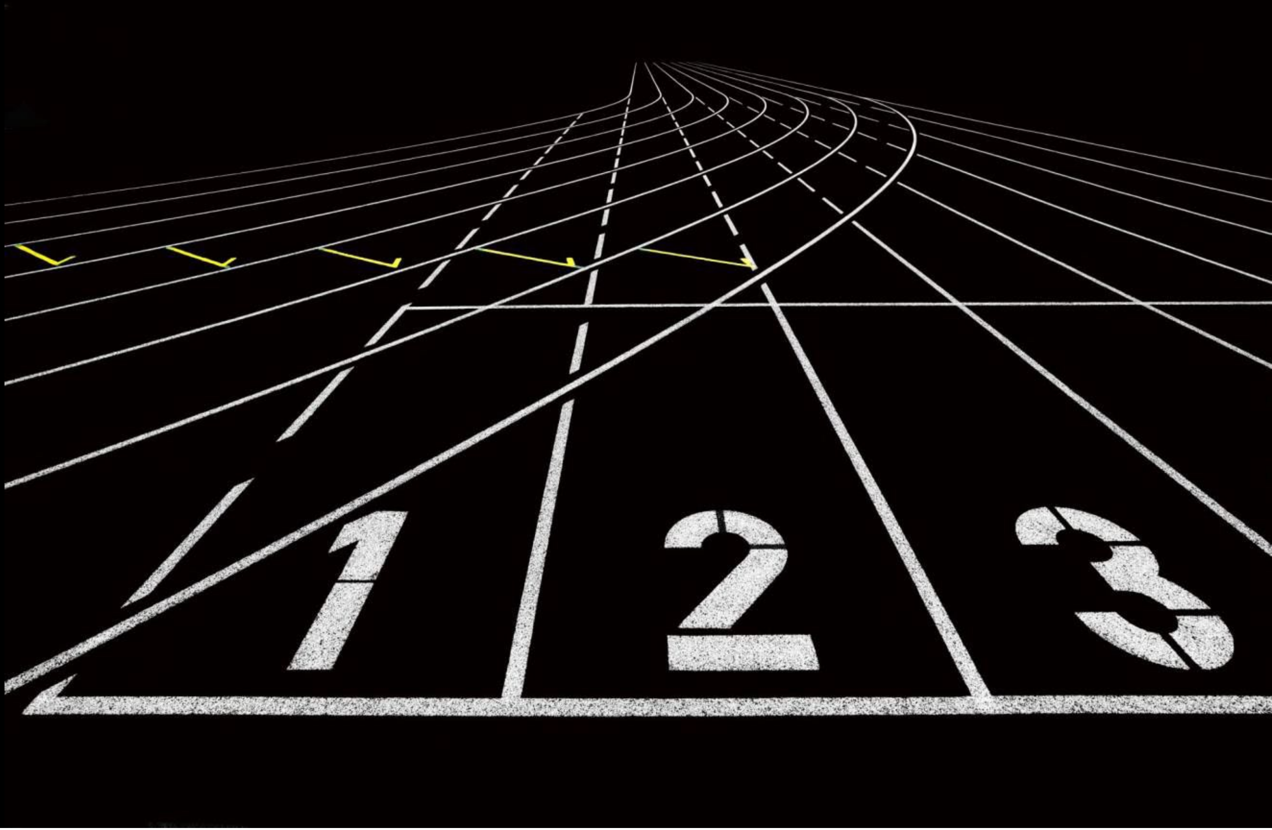
Base: Live in apartment

THE INSIGHT CENTRE



Household Energy Consumers
Findings in Detail

Knowledge gaps, attitudes, current behaviours, barriers to act & information needs



Most household energy decision makers surveyed thought it was important to reduce their energy use to manage costs. However, they were less confident about what they could do and unsure of the potential changes that could be achieved.

Around one quarter of decision makers reported that there was nothing they could do to reduce their energy bill.

While many households reported taking steps to reduce their energy use in the past 12 months, approximately 1 in 5 had not.

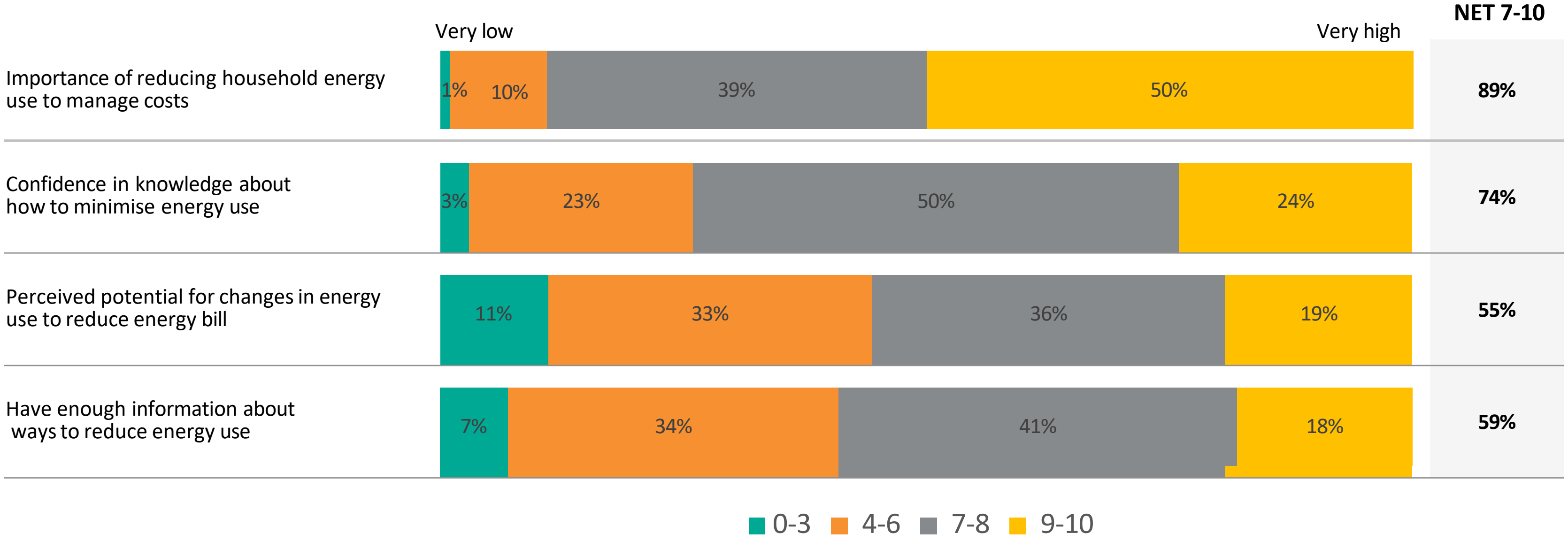
Households were most likely to implement energy reduction strategies that were low-cost and required little effort. They were unlikely to have undertaken many of the actions presented in the survey and on average, had only taken 4.3 of the 17 potential actions they could be taking.

Over 50% of households hadn’t undertaken the easiest to implement and/or lowest-cost energy saving activities.

There was a high level of interest in learning more about ways to reduce energy use and costs.

Communications context

While household decision makers saw the importance of reducing their energy use to manage their energy bill, they were less confident they knew how to do that and were unsure of the potential for changes to reduce their energy bill. Many didn't believe they had sufficient information about ways to reduce their energy use.



Respondents rated the extent to which a range of statements applied to them using a scale from 0 to 10 where 10 indicated the highest level of agreement and 0 the lowest. The ratings have been grouped 0-3; 4-6; 7-8; 9-10 and a Net 7-10 for analysis.

THE INSIGHT CENTRE

Attitudes

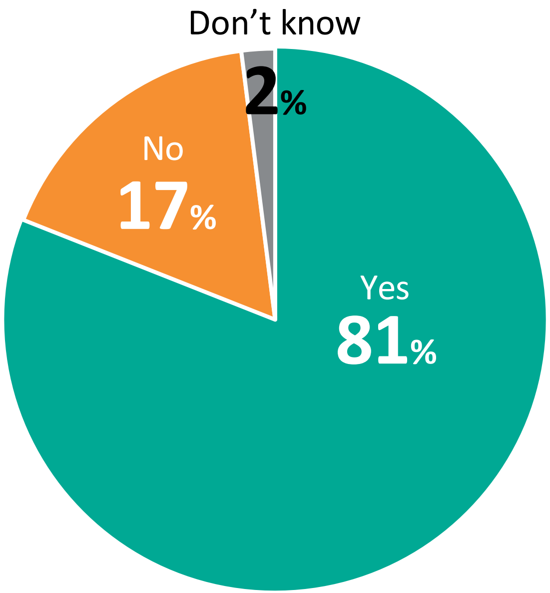
When asked to consider a range of attitudinal statements and how applicable these were to them, there was strong agreement amongst household energy decision makers on many of these statements.

		NET 7-10
High applicability	I am very concerned about increasing energy costs	84%
	It's important for households to use no more energy than they need	79%
	If we don't act now to try and reduce our energy use, energy will cost us much more in the future	71%
	If the government provided more financial incentives I would do more to reduce my energy use	71%
	I'm confident about my ability to reduce my energy use	63%
	I get the sense that lots of people are making changes to reduce their energy consumption	60%
Lower applicability	My living circumstances reduce my ability to make changes to my energy use	47%
	It's hard to work out what to do to reduce energy consumption	43%
	I can't control how other people in my household use energy	41%
	It's easy to reduce my energy bills	39%
	Taking personal action to reduce energy use is a waste of my time as it won't make a difference to my energy bill	32%

Q: Please indicate how much you feel each statement applies to you, using a scale from 0 to 10, where 0 means that it doesn't apply to you at all, and 10 means that it applies to you completely; sample size = 2500

Behaviours

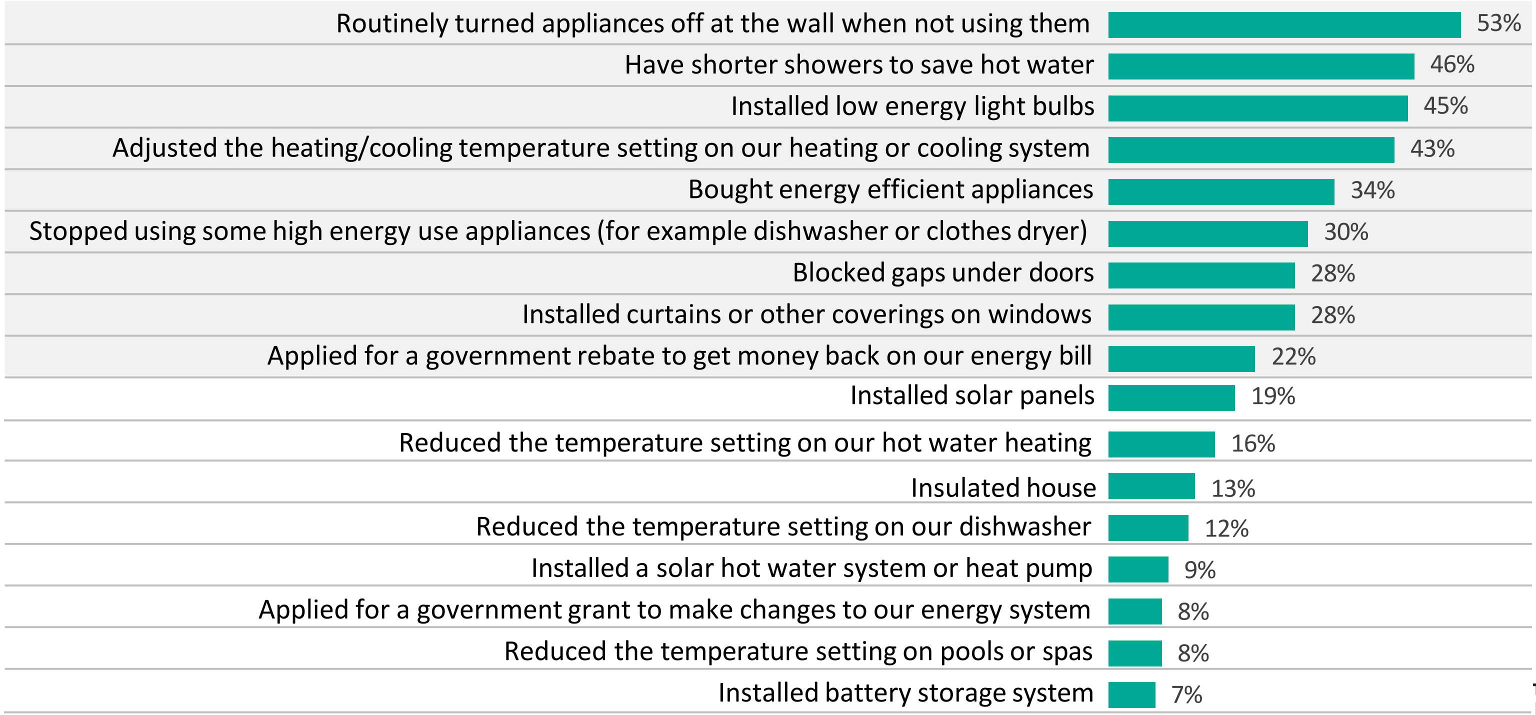
The majority of household decision makers indicated they had taken steps to reduce their energy use in the past 12 months, 2 in 10 people had done nothing/did not know.



Q: In the last 12 months, have you taken any steps to reduce your energy use? ; sample size = 2500

Behaviours

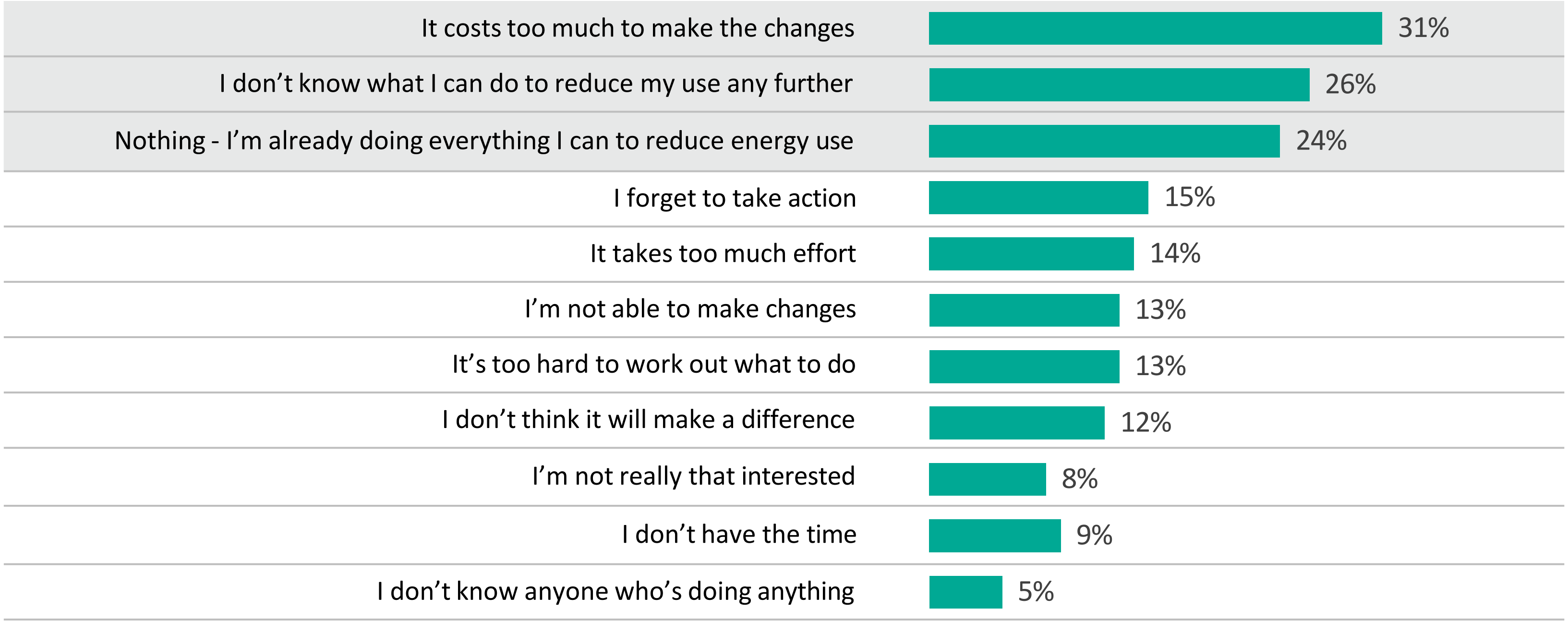
When prompted with a potential list of things they could do to reduce energy use or lower energy bills, on average, household energy consumers said they had undertaken 4 of the 17 measures presented.



Q: Which of the following ways of reducing energy use or lowering your energy bill have you done?; sample size = 2500

Barriers

Costs were the main barrier to reducing energy use, with 1 in 4 participants thinking they were already doing everything they could. Not knowing what else they could do to reduce their energy use further (26%) was among the top things preventing people from doing more.



Q: What stops you (if anything) from doing more in terms of reducing your energy use? (multi-response); sample size = 2500

THE INSIGHT CENTRE

Most household energy decision makers were very interested in receiving information about a broad range of energy saving strategies.

Topics with the highest level of interest were:

- The way different energy use patterns and major appliances contribute to their energy bill;
- How to save money by managing electricity use during peak and off-peak hours; and
- The impact on their bill of changes to their heating/cooling temperature settings.

Information needs

When asked about the importance of knowing more about a range of key information areas, household energy decision makers were interested in a broad range of topic areas.

	NET 7-10
A breakdown of how different energy uses/major appliances in my home contribute to my bill	**78%**
How to save money by managing my electricity use during peak and off-peak hours	**73%**
The impact on my bill of changes to the temperature settings on my heating and/or cooling systems	69%
The costs and benefits of replacing the appliances in my home with more energy efficient ones (such as buying a higher star rating clothes dryer or replacing light globes with more energy efficient ones)	69%
How to minimise temperature loss (such as by covering windows or minimising gaps under doors)	69%
How technology (such as smart metres or home energy management systems) can help me make savings to our energy bill	66%
The impact on my bill of changes to the hot water heating settings (such as the hot water temperature for clothes washing, dishwashing or heating pools or spas)	65%
How to get the most cost-efficient use of a solar system	65%
How to plan the switch to an all-electric home	53%
The impact of buying an Electric Vehicle on our household energy use	52%

Q: How important is it for you to know more about the following?; sample size = 2500

THE INSIGHT CENTRE

Active search behaviour, awareness of communications & information sources

THE INSIGHT CENTRE

Many household decision makers were not actively searching for information (only 49% had).

Of those decision makers that had searched, many did not find it easy to find the information they were looking for (43%) and for many the information they could find was neither relevant nor easy to understand.

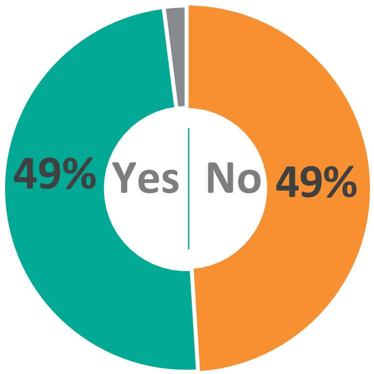
Approximately half didn't recall hearing or seeing any communications or media related to energy and/or ways to reduce energy consumption in the last 12 months. Of those who did, the majority reported seeing it on free to air TV or on the internet.

Consumer advocacy organisations were the most trusted sources of information about energy and/or ways to reduce energy bills.

Active search

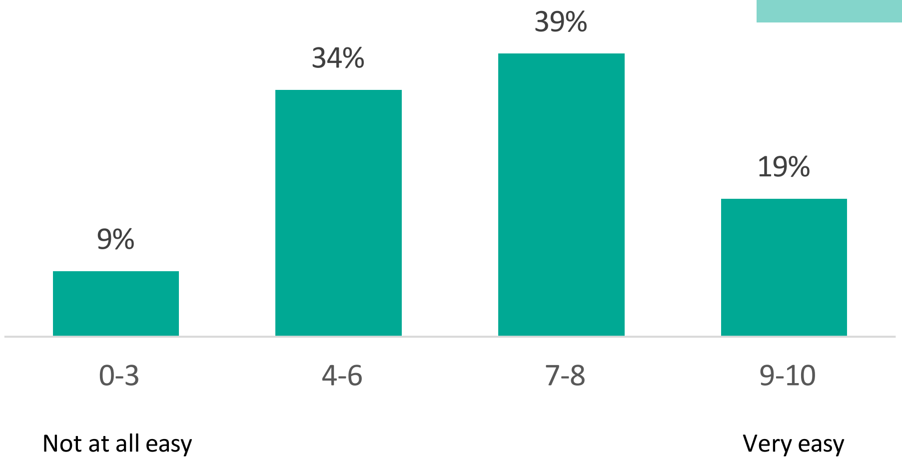
Many household decision makers have not searched for information on how to reduce their energy use. Of those who have looked, 4 in 10 found it hard to find the right information.

Searched for information on reducing energy use



Ease of finding the right information

NET 7-10
58%

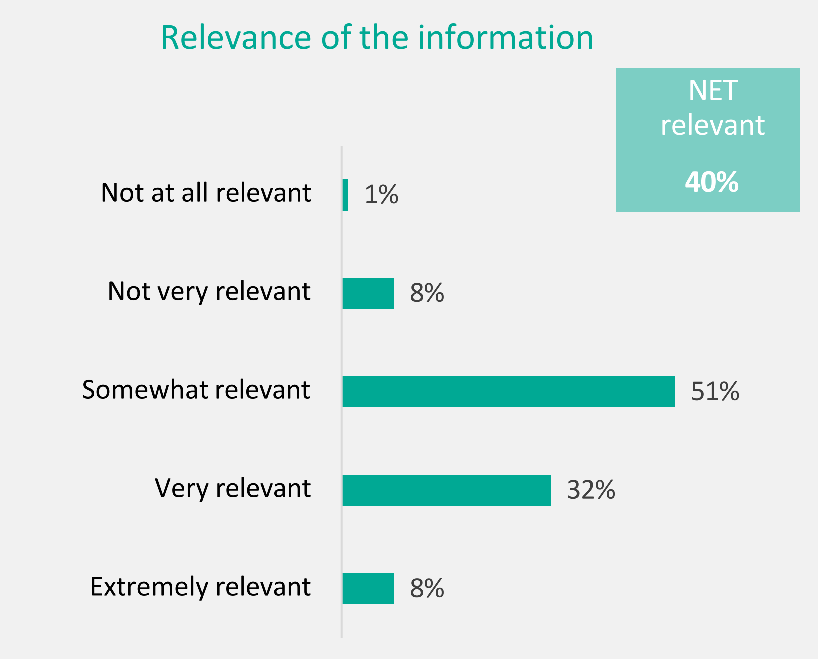


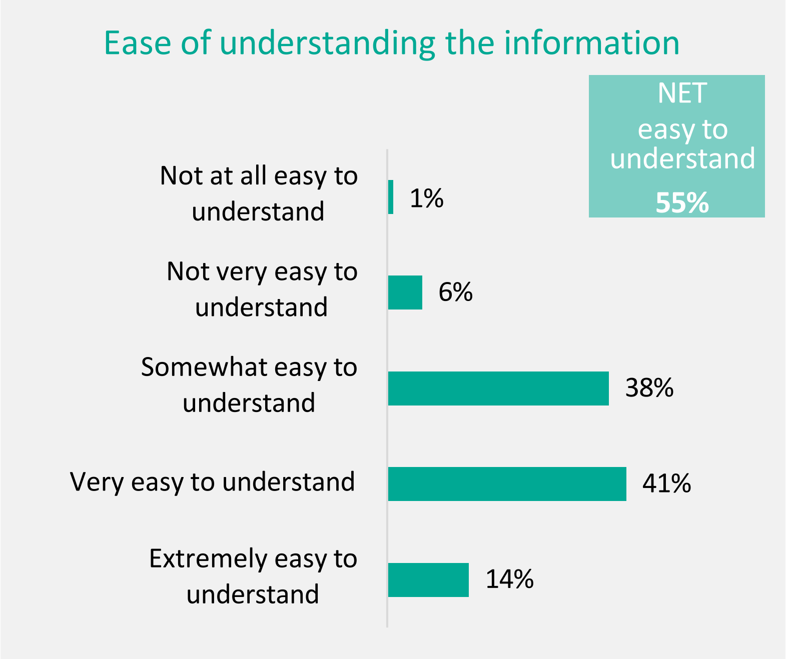
Q: Have you searched for information about ways to reduce your energy use or save money on your energy bills?; sample size = 2500
Q: On a scale of 0-10 how easy was it to find the right information for you and your circumstances?; sample size = 1233

THE INSIGHT CENTRE

Active search

Of the decision makers that had searched for information, most only found it "somewhat relevant" and it was not necessarily easy to understand.





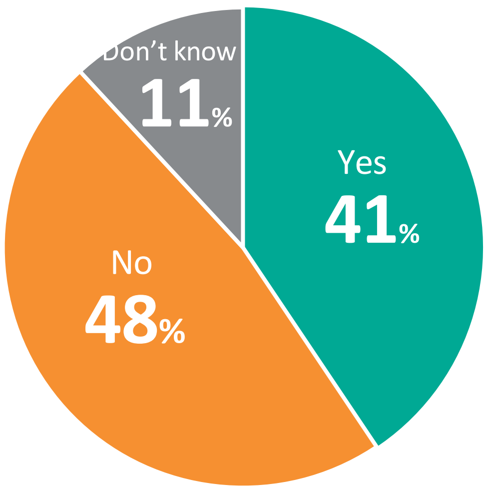
Q: Thinking about the information you found, how relevant was it to your circumstances?; sample size = 1233
Q: Thinking about the information you found, how easy was it for you to understand?; sample size = 1233

THE INSIGHT CENTRE

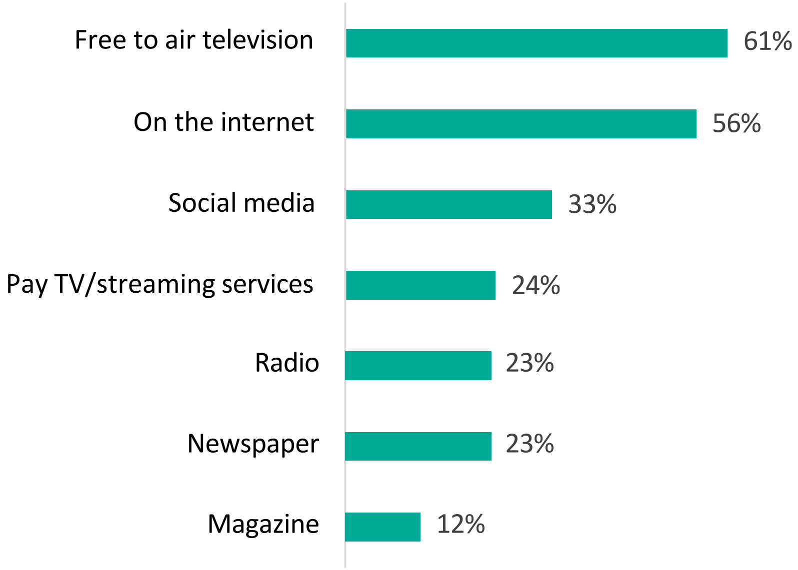
Energy communications awareness

Approximately, half the decision makers didn't recall hearing or seeing any communications or media related to energy and/or ways to reduce energy consumption in the last 12 months. Of those who did, the majority reported seeing it on free to air TV or on the internet.

Awareness of energy communications



Channels of energy communications

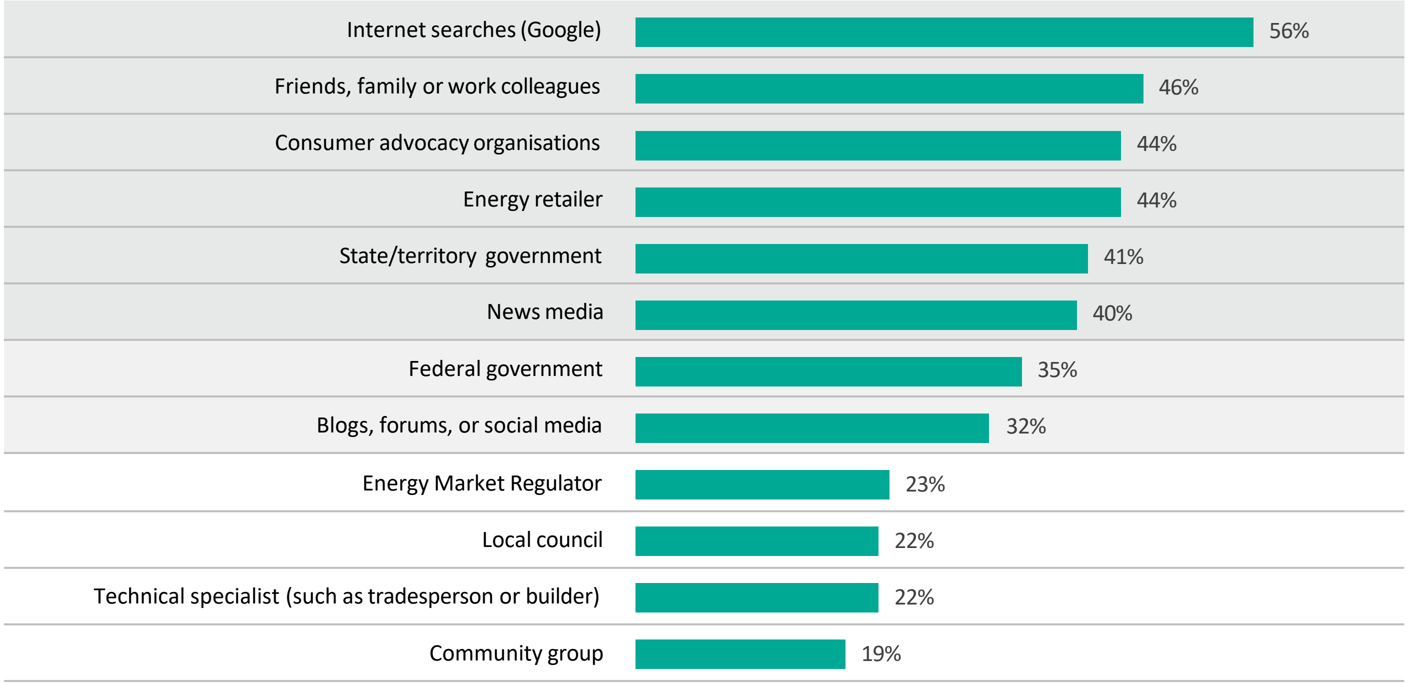


Q: Do you recall seeing or hearing anything related to ways to reduce energy costs and/or ways to reduce your energy use in the last 12 months in the media or online?; ss = 2500
Q: Where did you see or hear that?; sample size = 1016

THE INSIGHT CENTRE

Main information sources

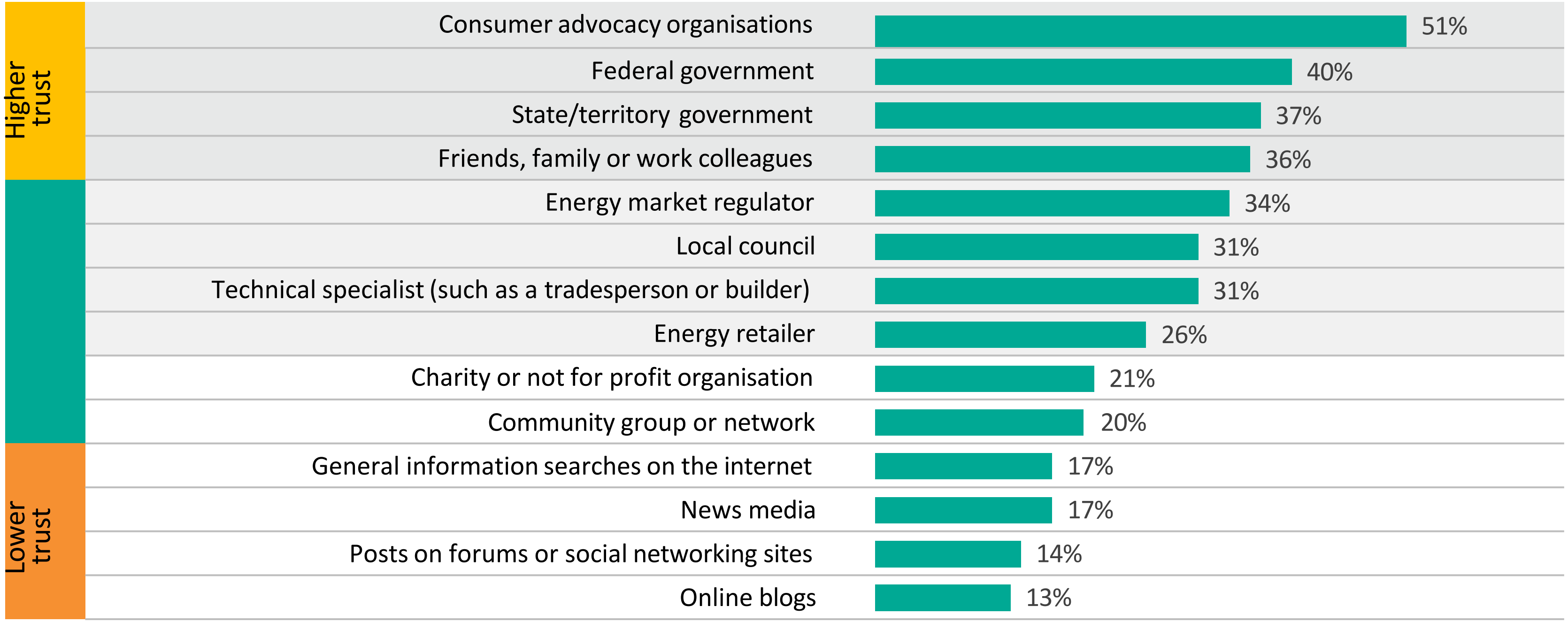
General internet searches, conversations with friends, family or work colleagues, information provided by consumer advocacy organisations, energy retailers, state/territory government or news media were the most frequently cited sources of information.



Q: Which of these information sources (if any) have you used to find out more about energy and/or ways to reduce your energy bills in the last 12 months?; sample size = 2500

Trusted information sources

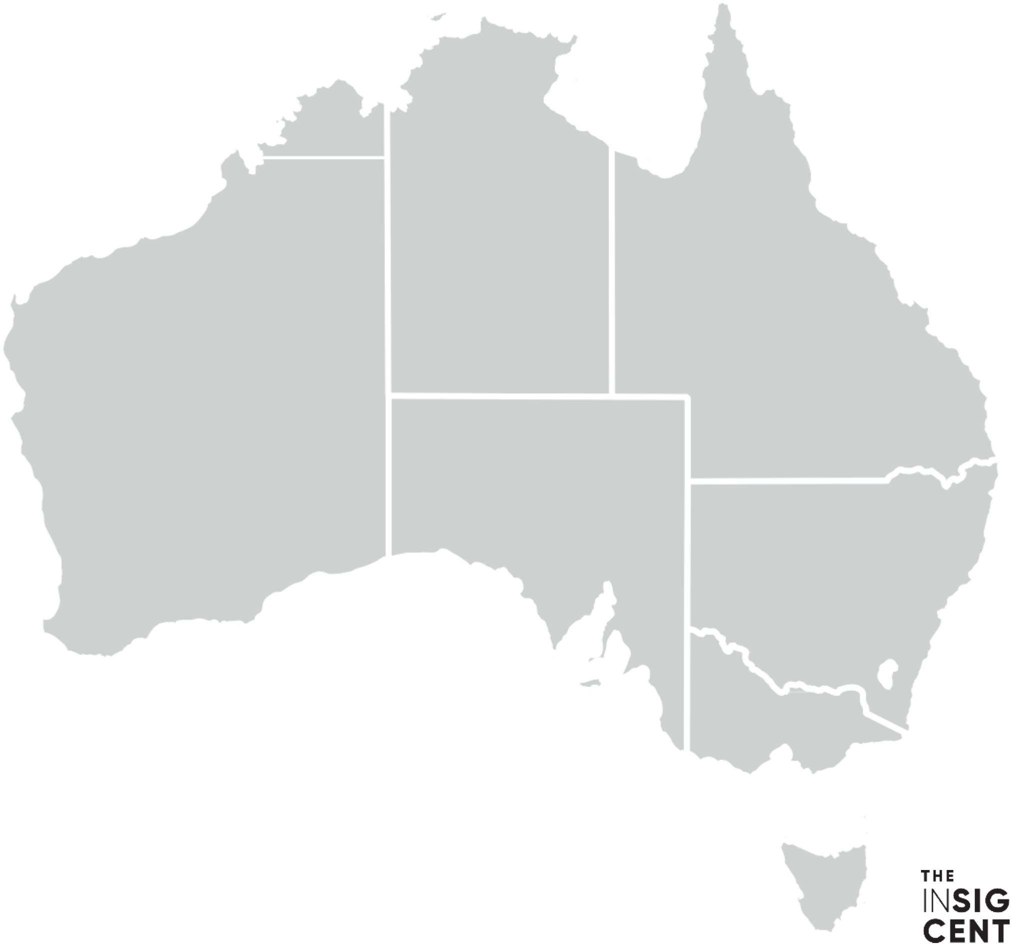
Consumer advocacy organisations, federal and state/territory governments were the most trusted sources of information about energy and/or ways to reduce energy bills.



Q: Which of these information sources (if any) do you trust to provide information about energy and/or ways to reduce your energy bills?; sample size = 2500

THE INSIGHT CENTRE

Analysis of state & territory differences



About this analysis

The research indicates that on many of the measures, the results by state / territory are more similar than different.

The information that is of most interest to consumers and the barriers that need to be overcome did not differ substantially based on the state/territory where someone lived.

Perceptions that it costs too much to make changes, that there is nothing more that can be done to reduce energy use, or a lack of knowledge about what else could reduce energy use further are among the top barriers irrespective of state/territory.

We have, however, identified within the report where there were differences that indicate a higher level of information need or barrier to act based on a higher likelihood to provide a specific response.

For example, decision makers in NSW indicated a higher level of interest in knowing how to get the most out of their solar system. While in Victoria the impact of buying an electric vehicle on household energy use and how to plan for an all-electric home were seen as more important.

It is these nuances that have been identified on the following slides.

The 3 top barriers to reducing energy use

NSW	Victoria	Queensland	Western Australia	South Australia	Tasmania	ACT	Northern Territory
It costs too much	It costs too much	It costs too much	It costs too much	Nothing - I'm already doing everything I can	It costs too much	It costs too much	It costs too much
I don't know what I can do	I don't know what I can do	I don't know what I can do	Nothing - I'm already doing everything I can	It costs too much	Nothing - I'm already doing everything I can	I don't know what I can do	I don't know what I can do
Nothing - I'm already doing everything I can	Nothing - I'm already doing everything I can	Nothing - I'm already doing everything I can	I forget to take action	I don't know what I can do	I don't know what I can do	It takes too much effort	Nothing - I'm already doing everything I can

THE INSIGHT CENTRE

The 3 top information areas of interest

NSW	Victoria	Queensland	Western Australia	South Australia	Tasmania	ACT	Northern Territory
The impact on my bill of changes to the temperature settings on my heating and/or cooling systems	The impact of buying an Electric Vehicle on our household energy use	A breakdown of how different energy uses/major appliances in my home contribute to my bill	A breakdown of how different energy uses/major appliances in my home contribute to my bill	A breakdown of how different energy uses/major appliances in my home contribute to my bill	A breakdown of how different energy uses/major appliances in my home contribute to my bill	A breakdown of how different energy uses/major appliances in my home contribute to my bill	A breakdown of how different energy uses/major appliances in my home contribute to my bill
How to get the most cost-efficient use of a solar system	How to plan the switch to an all-electric home	The costs and benefits of replacing the appliances in my home with more energy efficient ones	How to save money by managing my electricity use during peak and off-peak hours	The impact on my bill of changes to the temperature settings on my heating and/or cooling systems	The costs and benefits of replacing the appliances in my home with more energy efficient ones	How to save money by managing my electricity use during peak and off-peak hours	The impact on my bill of changes to the temperature settings on my heating and/or cooling systems
The costs and benefits of replacing the appliances in my home with more energy efficient ones	A breakdown of how different energy uses/major appliances in my home contribute to my bill	How to minimise temperature loss (such as by covering windows or minimising gaps under doors)	The costs and benefits of replacing the appliances in my home with more energy efficient ones	How technology (such as smart metres or home energy management systems) can help me making savings to our energy bill	How to save money by managing my electricity use during peak and off-peak hours	How to minimise temperature loss (such as by covering windows or minimising gaps under doors)	How to save money by managing my electricity use during peak and off-peak hours

THE INSIGHT CENTRE

Household energy consumer segments

THE INSIGHT CENTRE

About this analysis

Cluster analysis was used to group household decision makers based on the characteristics they possess. The analysis is designed to ensure there is as much likeness within the group and as much difference outside the group as possible.

The analysis used respondents' answers to a range of survey questions including:

- Confidence in knowing what to do;
- Perceived likely impact on their energy bill;
- Perceived ability to make changes to their energy use; and
- The extent to which they felt there were a range of things preventing them from making changes to the way they used energy.

The analysis can identify the target segments for the campaign based on a combination of factors including segment size, engagement with the topic, key messages likely to resonate and propensity to be impacted by a communications campaign.

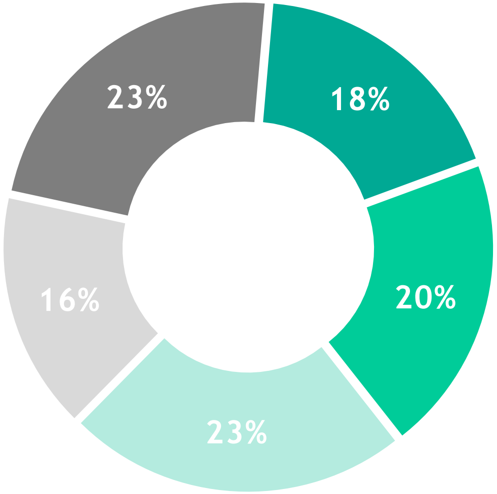
THE INSIGHT CENTRE

Not a problem | 23%

Low level of confidence in ability to reduce energy use. Strong belief that taking personal action will be a waste of time and not make a difference.
Less likely to have taken any actions to reduce energy use or power bill, despite less likely to be impacted by barriers stopping them from doing more. Low likelihood of looking for information and low level of interest in knowing more. Profile: Slightly skewed to young singles.
LOW MOTIVATION.
LOW PRIORITY SEGMENT.

Why bother | 16%

Most likely to believe that taking personal action to reduce energy use is a waste of their time and wouldn't make a difference to their energy bill.
More likely to forget what to do and believe it takes too much effort. Concerned about ability to manage other members of their household's energy use. Profile: Younger singles and couples. Shared households. Renting Living arrangements sometimes reduce their opportunity to make changes.
CONVINCE ME THE BENEFIT IS WORTH THE EFFORT.
TELL ME WHAT TO DO AND SHOW ME IT CAN MAKE A DIFFERENCE.



Don't leave us behind | 23%

Relatively high level of concern about impact of rising energy costs. More likely to say it costs too much to make the changes. Have made some changes particularly those things that don't require financial investment. Profile: Low opportunity to make changes – high levels of renting, apartment and high rise living. Coupled with limited funds to invest. Seeking financial support from government.
TELL ME WHAT I CAN DO WITHOUT NEEDING TO INVEST MONEY AND WHERE I CAN GET ASSISTANCE.

What next | 18%

Highest confidence in ability to reduce energy use. Strong belief that it is easy to make an impact on their energy bill and few barriers to making changes. Highest number of existing actions taken to reduce energy use or bill. Least likely to believe that taking personal action to reduce energy is a waste of time. Have actively searched for information in the past and want to know more about ways they can reduce their energy use. Profile: High motivation and ability to act. Most likely to own home and be retired.
REINFORCE AND REMIND ME WHAT TO DO.
TELL ME WHAT TO DO NEXT.

Make it easy | 20%

Lowest confidence in ability to reduce energy use coupled with a strong belief that it's hard to work out what to do and isn't easy to make a difference to their energy bill. Concerned about their ability to manage other members of their household's energy use. Strong interest in knowing more. Will need to overcome perception that there are too many barriers stopping them from doing more. Strong belief that Government financial incentives would allow them to do more. Profile: Time poor families with mortgages.
MAKE IT EASY FOR ME. TELL ME WHAT TO DO TO HAVE THE BIGGEST IMPACT ON MY ENERGY BILL.

THE INSIGHT CENTRE

How the segments differ

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Level of concern about increasing energy costs	Highest level of concern	High level of concern	High level of concern	Low level of concern	Lowest level of concern
Confidence in ability to reduce energy use	Highest level of confidence	Lowest level of confidence			
Belief in capacity of action to make a difference to energy bill	Strong belief in capacity to make a difference to energy bill			Lowest level of belief in capacity to make a difference to energy bill	Low level of belief in capacity to make a difference to energy bill
Degree of difficulty working out what to do to reduce energy consumption	Strongest belief that can work out what to do to reduce energy consumption	Highest level of difficulty working out what to do		High level of difficulty	
Degree of motivation to act now	Strongest level of motivation to act now				Lowest level of motivation to act now
Level of interest in knowing more	Highest interest in knowing more	High interest	High interest	Mid-level interest	Lowest interest in knowing more

THE INSIGHT CENTRE

Actions to reduce energy use or power bill

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Number of actions	Highest number of actions	High number of actions	Low number of actions	Lowest number of actions	Lowest number of actions
Actions to reduce energy use or power bill	Most likely to have engaged in a range of behaviours to reduce use (such as turning off appliances when not in use, taking shorter showers). Most likely to have made investments in their home (insulation, solar panels, battery storage). Most likely to have applied for a government rebate	Likely to have made changes to their energy use to reduce consumption but mostly those things that do not require investment.	Have made some changes particularly turning off appliances when not in use, shorter showers and installing energy efficient light globes.	Less likely to have taken energy saving actions.	Less likely to have taken energy saving actions.

THE INSIGHT CENTRE

Barriers impacting ability

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Number of barriers	Lowest number of barriers	Highest number of reported barriers		Highest number of reported barriers	Low barriers
Barriers reducing ability to do more	Most likely to say that they don't have any barriers and are already doing everything they can to reduce energy use. Less likely to say that cost to make changes is a barrier.	Most likely to say it costs too much to make the changes. Most likely to not know what else they can do reduce energy use. High likelihood to forget to take action, believe it takes too effort and that its hard to work about what to do next. Not having time and not believing it will make a difference are also high.	More likely to say it costs too much to make the changes. Less likely to forget or believe it takes too much effort.	Less likely to cite costs as a barrier. More likely to forget to do things that could reduce energy use and believe it takes too much effort. More likely to say "I'm not really that interested".	Cost not a barrier. Perceived effort and not making a difference anyway. More likely to say "I'm not really that interested.

THE INSIGHT CENTRE

Difficulty, search & trust

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Degree of difficulty working out what to do		More likely to believe it is harder to work out what to do		More likely to believe it is harder to work out what to do	
Active search for information	Most likely to have searched for specific information – driven by higher level of interest.			More likely to do general searches on the internet – driven by higher level of internet use.	Least likely to have searched for information.
Level of trust in organisations to provide information about energy and/or ways to reduce energy bills.	High level of trust in Government.		Low level of trust in online blogs or posts on forums or social networking sites.	Highest level of trust in online blogs or posts on forums or social networking sites.	Lower level of trust in levels of government and energy market regulator. Low level of trust in online blogs or posts on forums or social networking sites.

THE INSIGHT CENTRE

Living circumstances

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Living circumstances impacting ability to make changes to energy use	Lowest level of impact	High level of impact	High level of impact	Highest level of impact	
Role of government financial incentives		High level of impact	High level of impact		
Living circumstances	Highest home ownership	Highest level of home loan or mortgage	Highest level of renting	Highest level of home loan or mortgage	
Type of accommodation	Most likely to live in a freestanding home	Most likely to live in a freestanding home			
Financial circumstances	High level of government support payment or benefit		High level of government support payment or benefit		

THE INSIGHT CENTRE

What demographics define the segments

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Age	Highest number of people aged 60 year and over			Highest number of people aged 18-39 years	
Education		Highest level of under- and post- graduate qualifications	Least likely to have a degree		
Income	Lower income band	Higher income band			
Language other than English spoken at home		Highest likelihood of Language other than English spoken at home			
Government support payment or other benefit	Higher likelihood		Higher likelihood		
Household type	Most likely to be mature single or couple	Most likely to be families with children		More likely to be young singles or couples or in shared living arrangements	More likely to be young singles

THE INSIGHT CENTRE

Motivation, ability & opportunity

	What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Motivation	High level of motivation.	Medium level of motivation.	Medium level of motivation.	Low motivation to act. Not sure the benefit will be worth the effort.	Low motivation to act. Lowest level of concern.
Ability	Have already taken a range of action. Low barriers to act.	Have already taken many actions but not sure know what else to do. Concerned about ability to influence household behaviour.	Some concern about ability to influence household behaviour	High number of barriers perceived to impact ability to act.	Highest level of inaction despite high level of ability to act.
Opportunity	High opportunity to act. Most likely to own home and live in a freestanding home. Likely to have access to funds to invest in energy saving appliances and systems.	High proportion of families. High numbers with mortgage or loan. Limited funds to invest in energy saving systems. Seeking government support to help them make substantial changes.	Highest level of renting. Highest level of apartment and high rise living. High level of government support payment or benefit. Limited funds to invest. Seeking government support to help them make changes.	Renting and living circumstances can limit ability to influence household behaviour within share household arrangements. Some concern about financial capacity.	Medium opportunity to act.

THE INSIGHT CENTRE

Bringing the segments to life

The data from the segmentation analysis has been used to develop a persona for each segment that aims to bring them to life.

These personas are based on the key characteristics that differentiate the segments and are designed to depict some of the defining features of the energy consumers within the segment.

The purpose of these personas is to provide a picture of what we might find if we met someone from the segment.

Analysis of the media habits and online platforms used for each of the segments are included as this information will help develop channel strategies.

Bringing the segments to life

What next | 18%

We have always been careful with our energy use. It's important for everyone to try and do what they can to only use what they need.

We don't have the kind of income we used to have and with costs rising we have been making changes to how we use energy.

We've done most of the simple things and invested in solar panels but are wanting to know what else we can do to reduce our costs.

Bringing the segments to life

Make it easy | 20%

Everything is becoming more expensive and to make matters worse our mortgage payments have increased a lot. We just don't have much left from our incomes after all the bills are paid.

Life is so busy with the kids that we really don't have time to work out what to do.

We want to make sure we are using only what we need to and that we are taking advantage of any government rebates or financial support to help us with the energy transition.

THE INSIGHT CENTRE

Bringing the segments to life

Don't leave us behind | 23%

It's hard to make ends meet these days.

We'd like to buy new energy efficient appliances but that's just a dream when we struggle to afford the basics.

It's all well and good for those who can put solar panels on their house, but we live in an apartment and it's not as simple. We don't have that kind of money anyway.

The government really needs to help people like us.

Bringing the segments to life

Why bother | 16%

It’s one of the things we argue about in my share house.
Why is the energy bill so high and who’s been using the most?

But we don’t really have time to work out what to do.
We rent so it’s not up to us to invest in the property.

Is there a list of things we could do that will make the biggest difference?

THE INSIGHT CENTRE

Bringing the segments to life

Not a problem | 23%

It’s not something I can be bothered thinking about to be honest.

Energy bills are getting more expensive but so is just about everything.

I’m not concerned about how we use energy. It is what it is.

THE INSIGHT CENTRE

Targeting

Media use (ranked by frequency of use)

What next	Make it easy	Don’t leave us behind	Why bother	Not a problem
Free to air TV	Pay TV or streaming services	Free to air TV	Free to air TV	Free to air TV
Radio	Free to air TV	Pay TV or streaming services	Internet (not including email)	Pay TV or streaming services
Pay TV or streaming services	Social media	Internet (not including email)	Pay TV or streaming services	Internet (not including email)
Internet (not including email)	Internet (not including email)	Social media	Social media	Social media
Social media	Radio	Radio	Radio	Radio
Newspaper	Blogs or forums	Blogs or forums	Blogs or forums	Blogs or forums
Blogs or forums	Newspaper	Newspaper	Newspaper	Newspaper
Magazines	Magazines	Magazines	Magazines	Magazines

Targeting

Internet platforms (ranked by frequency of use)

What next	Make it easy	Don't leave us behind	Why bother	Not a problem
Facebook	Facebook	Facebook	Facebook	Facebook
News sites	YouTube	YouTube	YouTube	YouTube
YouTube	Instagram	News sites	Instagram	Instagram
Instagram	News sites	Instagram	News sites	News sites
Forums/message boards	TikTok	TikTok	TikTok	TikTok
LinkedIn	LinkedIn	LinkedIn	LinkedIn	LinkedIn
TikTok	Forums/message boards	Forums/message boards	Forums/message boards	None of these
X (Twitter)	X (Twitter)	X (Twitter)	X (Twitter)	X (Twitter)
None of these	Blogs	None of these	Blogs	Forums/message boards
Blogs	None of these	Blogs	None of these	Blogs

THE INSIGHT CENTRE

Appendices

THE INSIGHT CENTRE

Methodology

Household Survey

- Australians aged 18+; main or joint decision makers regarding household energy.
- Sample size = 2,500
- Quotas for age, gender and location (state/territory and metro/regional/rural).
- Sample accessed via consumer research panel.
- 20-minute online survey.

Survey Themes

Screening for Quotas	Awareness, Knowledge & Behaviours	Communications Framework		Information Search and Media usage	Profiling
Household: • Age • Gender • Location	• Importance of reducing energy use to manage costs • Confidence in knowledge about how to reduce energy use • Actions taken to reduce energy use • Barriers to change	• Current information sources • Ease of accessing information • Relevance of available information • Response to series of attitudinal statements	• Perceived need for information about reducing energy use • Perceptions re potential for changes to reduce energy bill • Response to key information areas and identification of priority areas	• Awareness of information sources and communications on ways to reduce energy use or lower energy bills • Use of state/territory/ federal government websites • Media usage patterns	**Household:** • Life-stage • Income • Education • Work status • Cultural background • Home status (owner/renting) • Living situation • Premise type

20 minutes

Note: While there was consistency in terms of the major themes covered, survey questions were refined to ensure relevance for the household consumer circumstances.