Energy Consumers Australia

Talking to consumers about energy bill reduction

Household Energy Consumers: Qualitative Research & Message Testing

March 2024

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About this research

- Research overview

Research overview

This report was developed for Energy Consumers Australia. It details findings from the qualitative phase - Phase 3 - of a larger research project exploring the best way to communicate with energy consumers about bill reduction and energy saving strategies.

Phase 1 comprised a review of existing audience research, the broader communications landscape, and lessons from international energy-related campaigns.

Phase 2 involved quantitative research with Australian household and small business energy consumers, which informed an audience segmentation, available here.

Phase 3 builds on these findings with qualitative research insights captured in two reports - this report on households, and a separate report on small business consumers.

The Phase 3 qualitative research discussed in this report was designed to:

1) test hypotheses developed from the Phase 1 and 2 results;
2) provide a deeper understanding of the beliefs, attitudes and behaviours of the identified segments;
3) test messaging designed to drive household consumer action on energy saving practices.

The fieldwork was conducted from 8-12 December 2023, with 120 household participants involved in 10 online discussion forums.

All participants were recruited through the Phase 2 survey – a national sample of energy consumers. Participants were selected for qualitative research based on their segment membership (for details, see the Appendix).

Message testing approach

- Messages were tested across all segments, using identical message copy.
- Messages were displayed with diverse and inclusive images. Each segment was shown an image applicable to them.
- Participants were instructed to consider and provide feedback *only* on the content of the message and not the image.

Desktop review (Phase 1)

Review of existing research

Review of existing campaigns and communications

Consumer simulation exercise

Quantitative (Phase 2)

Survey with 2500 households

5 consumer audience segments developed

Qualitative (Phase 3)

Qualitative deep dive with each segment through 10 online discussion forums

Key insights

- Implications for strategy and messaging

Key insights: Implications for strategy & messaging

We tested four messaging concepts (see Appendix) on energy saving with the five household segments identified in the Phase 2 quantitative research. These insights and strategic implications are designed to refine our insights from Phases 1 and 2 and provide guidelines for messaging that will drive consumer action.

	Insights	Strategy and messaging implications
1	**Households want to hear how they can control their costs through reducing their use. But they also want to know what drives their energy costs (i.e. certainty).** Some households believe they are already doing all they can to control their energy use. These households need 'new' information to pay attention to a message.	From a message framing perspective, we recommend combining 'control' and 'certainty': - To provide certainty to the audience, provide clear information about energy cost drivers (e.g., heating/cooling contributes up to 50% to your energy bill). - To provide a sense of 'control' to the audience, offer clear, easy to achieve calls to action that put the consumer in the driver's seat.
2	**Key audience preferences include:** • shorter and more to the point messages. • mentions of reducing environmental impact – although cost remains the main driver for action. • the phrase "a small change can make a big difference", which resonated across all audience groups.	From a messaging perspective: • Use succinct messaging with a clear call to action and a clear benefit. • Communicate both cost reduction benefits and environmental benefits together. • Communicate that small actions matter e.g. "a small change can make a big difference".
3	**The audience needs enough information to feel confident they are taking the correct action and to avoid 'action barriers'.** For example, the message "adjusting your temperature by a couple of degrees is one of the biggest things you can do to save money" requires more information. Households want to know an optimal temperature setting before they take action.	In relation to the call to action: • Anticipate questions consumers might have in relation to the call to action. • Include directions about *how* to take action e.g. how to set or adjust home devices. • To keep directions succinct, consider using a visual device showing how to take action e.g. a split screen image showing how to adjust settings on various devices, and to what level.

THE INSIGHT CENTRE

Key insights & implications for strategy and messaging cont'd

	Insights	Strategy and messaging implications
4	Highlighting the positive impact of consumer action on ”taking pressure off the grid” divides the audience. Many feel institutions, not consumers, should be responsible for reliability.	• Avoid “taking pressure off the grid” or “avoiding outages” as benefits of consumer action. It can alienate a proportion of the audience who don’t want to feel responsible for reliable energy.
5	Consumers **do not have time for research and won’t pay for access** to information.	• Use self-contained outbound communications (e.g. advertisements) that don’t need consumers to go further (e.g. visit a website) for information.
6	**Households trust information sources that appear reliable, relevant and focused on consumer interests.** Consumer organisations are the most trusted and seen as independent, transparent, relevant and focused on the best interests of consumers. Government is also trusted, and seen as reliable, accessible and unbiased. Retailers are the least trusted due to perceived bias and self-interest.	• The voice of the campaign should be a consumer organisation. • If the message is coming from government, consider including an endorsement from a consumer organisation.
7	**Members of households do not always share the same willingness to act.** This creates barriers to implement even small changes to energy usage within the home.	• Develop shareable, succinct and evidence-based resources that can be shared within households.
8	**Some consumers have concerns about being asked to adjust their heating and cooling -** due to disability or weather conditions in their region. Many have already adjusted and are concerned about the health or comfort impacts of doing more.	• Include caveats in messaging about heating and cooling that reassure the audience to only do ‘what they can’. • As per Recommendation 3, show optimal settings that minimise energy use but sustain comfort.

THE INSIGHT CENTRE

Context: Understanding the audiences

- Key audience segment insights
- Energy use & costs
- Actions & barriers
- Technology
- Trusted information sources & needs

Notes on this section:
Quotes are colour-coded by segment membership throughout the report. Segment percentages refer to the audience segmentation conducted in the quantitative study (size of segment).

Key audience segment insights

The quantitative study in Phase 2 of this research - a survey of 2,500 households and 400 small businesses - identified five household consumer audience segments.

Phase 3 used qualitative deep dives with the five audience segments to identify in-depth differences and similarities in motivations, behaviours and messaging preferences.

A communications strategy looking to reach the most consumers with a single message should **focus on the first three most motivated segments**.

Across all segments, **cost saving is the main driver for taking action** and **simple and clear messaging to support cost-reduction actions resonates well.**

What Next (18%)	• Highly motivated to act. • Have already taken a range of actions with low barriers to act. • Open to complex messaging: require detailed and specific information on associated costs vs savings of installation of energy-saving devices, solar or other energy-saving options. • Despite being further along on their energy-saving journey, want to see simple information made available to others. • Cost is a priority – but least cost driven of all segments and more motivated to reduce their impact on the environment. • Least likely to be motivated by messaging on reducing outages.
Make it Easy (20%)	• Medium level of motivation to act. • Have already taken many actions but not sure what else to do. Concerned about ability to influence household behaviour. • More likely to act on simple messaging: want clear information on energy use and costs (inclusive of specific appliance usage), and practical energy-saving tips for daily household chores, energy use, and appliances. • Most likely to be motivated by both cost-saving and environmental messaging. • Less likely to be motivated by messaging on reducing outages.
Don't Leave Us Behind (23%)	• Medium to high motivation to act. • Some concern about ability to influence household behaviour. Unsure what else to do beyond high uptake of smaller-scale actions. • Require easy to follow information on what can be done around the home to cut back on energy use, including for renters who do not have access to large-scale installations like solar. • Most likely to be motivated by cost-saving messaging.
Why Bother (16%)	• Low motivation to act. • Not sure the benefit will be worth the effort, with a high number of perceived barriers to their ability to act. • Uncertainty of where to go for information. Require information on which solutions have the most impact, especially for those on lower incomes. • Higher motivation to act in response to cost-saving messaging, with some motivation to act from outages messaging. • Less likely to be motivated by environmental messaging than other segments.
Not a Problem (23%)	• Low motivation to act, with lowest level of concern. • Highest level of inaction despite high level of ability to act. • More likely to act on simple cost-saving messaging. • Require wealth of information on energy use and costs, as well as solution comparisons.

For in-depth audience segment profiles, please see the Appendix.

Consumer concerns about their energy use

Most participants are concerned about their household's energy use due to increasing costs.

Some express frustration that despite their efforts to minimise energy consumption, energy price increases continue to drive their costs up.

Consumers are concerned about their inability to keep up with price increases - even when implementing energy-saving measures or 'shopping around' providers.

I have always been energy conscious but with costs rising and with the installation of our solar panels, I have become even more conscious by using what we can when the sun is shining and using less at night. Woman, 60-64, Queensland, What Next.

I live in a unit so it can be hard to change the energy use/reduce energy especially when it comes to things like using a dryer. The last year I feel like my bill has increased by at least 40% but trying to consume less energy is hard. Woman, 35-39, Queensland, Make it Easy.

Will I have to choose between putting food on the table, clothes on our backs or keep the lights on? [...]. I try so hard not to let it worry me, but it does. I rent so I cannot install solar, so the price of electricity is one of my main concerns. Woman, 50-54, Queensland, Don't Leave Us Behind.

Our bill has gone up around $150 each quarter which is a huge amount for us. So, cost factor is definitely the biggest concern for me but then if we don't use air-con/appliances etc. day to day our life isn't as organised or peaceful. Woman, 35-29, South Australia, Why Bother.

My biggest concern is cost, and this has been the case since the pandemic when we moved to working from home. Woman, 35-39, Western Australia, Not a Problem.

Barriers to taking action to reduce use

Primary barriers to action are financial constraints and living situation (e.g. renting, apartment dwelling).

Many participants feel they are already 'doing everything they can', although most can think of energy-saving measures they have not yet implemented.

Participants express a desire to make changes but face various obstacles including: a lack of time to research what to do; an inability to motivate others in their household to make changes; and difficulty prioritising different cost-saving options.

Finding the time to really research what is available and the cost of installing the roller shutter on an upstairs window which is quite large. Woman, 65-69, South Australia, What Next.

We could possibly upgrade some older appliances - but there is always the argument about adding to landfill. Woman, 45-49, Queensland, Make it Easy.

Unable to afford to do it myself and unable to afford to offer the landlord a suggestion of going 50/50 in the cost, especially nowadays, we as tenants, are so unsure if we will still be in the same rental in a year. Woman, 50-54, Queensland, Don't Leave Us Behind.

The cost to purchase the solar panels and the batteries and the fact that they are not portable. Woman, 35-39, Western Australia, Why Bother.

Finding someone reputable to install solar panels and finding information about the best option I can trust have stopped me from moving forward. Woman, 35-39, Western Australia, Not a Problem.

What will help consumers to make changes?

Participants express confusion about implementing energy-saving measures and want easily accessible information.

They want to see **broad-based education campaigns to assist all consumers, and to support household decision making.**

They also want these campaigns to provide **specific information about the simplest, highest value changes and the potential savings on offer.**

Energy consumers also express a **desire for financial incentives and action to lower the cost of higher-value investments in energy-saving changes** (e.g. interest-free loans; government grants for solar panels; and subsidies for insulation, energy-efficient appliances, batteries, double glazing, and other energy-efficient home improvements).

Minimise the confusion in relation to this topic. Simply outline the benefits and costs and explain the environmental and monetary advantages in simple terms. Man, 55-59, Victoria, Make It Easy.

If other people in the household also did the same thing. Man, 18-24, New South Wales, Don't Leave Us Behind.

I could make more changes if I was aware of what those changes might be. Woman, 45-49, South Australia, Why Bother.

A greater understanding of exactly how much I've helped saved. A more distinct schedule for when to turn things on or off. Man, 18-24, Tasmania, Not a Problem.

Government incentives for property owners to install solar panels on rental properties. Man, 55-59, South Australia, What Next.

What do consumers want to know?

Information is needed to support behaviour change, such as how best to use appliances (e.g. temperature settings) and other simple ways to save on energy.

Participants express a need to plan how to reduce their energy costs. They require information that breaks down energy costs, ways they can offset these costs and the associated savings. This includes:

1. return on investment – comparing cost of action against future savings (e.g. solar installation, appliance upgrades).
2. understanding peak/off-peak rates.
3. understanding the main cost drivers and how to monitor high energy appliances.

Consumers seek **transparent information on provider rates, government rebates, and resources that allow them to make a cost-benefit comparison.**

Additionally, there is **demand for technology integration**, like smart meters.

How much it would cost to install against how much money you can save. It would be beneficial to know how long it would take for it to pay for itself. Woman, 45-49, Western Australia, What Next.

All of the available tips and tricks for domestic users, in one place and in plain English. Needs to be a credible source, not from a company trying to entice business. It would be good to know how to compare electricity provider plans and your return on investment for some of the higher cost options. Woman, 55-59, Australian Capital Territory, Don't Leave Us Behind.

A comprehensive list of solutions (maybe as a checklist?) on a sliding scale of "small things you can do now" to "big things you will need to save and plan for". For each solution, I would like information on associated costs, how effective I can expect it to be, broad guidance on how to action it (if complex) and any key things I need to consider/ look out for. Woman, 30-34, Australian Capital Territory, Why Bother.

What technology are consumers interested in?

When discussing **what they or others might want or need to make further energy saving changes**, some participants express interest in **energy monitoring technology,** such as smart meters.

Interest in and desire for energy monitoring technology are most present **in the 'What Next' segment** and often come from **those who are already monitoring their use** in some way.

Real understanding of our energy use. I would need to install a smart meter in the power board to be able to see the actual import/export/usage of solar power and then we could directly adjust our usage based on that. Running direct power monitoring on particular power points to understand the usage there. Man, 40-44 years, Western Australia, Make it Easy.

I'd want a real-time smart meter, so I can understand how much I am spending at any given time. It is hard for me to know how much running the air conditioner actually costs as I don't know how efficient / inefficient it is. Same thing for my refrigerator and washing machine. I need to know how much energy they use per hour and how much that is going to cost me.
Man, 25-29 years, Queensland, Not a Problem.

I think it would also be really nice to know what in the house uses the most electricity. That's kind of why I wanted to use a Smart meter. Woman, 35-39 years, South Australia, What Next.

To know how much energy you're using at what time of day and what each appliance is using. I already get this information with my Powerpal. Man, 70+ years, Tasmania, What Next.

Monitoring solar output already allows me to use appliances at times when I don't have to draw power from the grid. Having smart meters and being aware of just how much appliances cost to run per hour would be useful. Knowing how much it costs to do a load of laundry at 40 degrees as opposed to 60 and seeing the cost savings would encourage people to make changes. Woman, 55-59 years, Western Australia, What Next.

Trusted information sources

Consumers express the **highest level of trust in consumer-focused organisations** as a source of energy-related information. Government is also seen as a reliable source of information.

Consumer-focused organisations

Perceived as independent, transparent and focused on the best interests of consumers. Other attributes consumers value include lack of bias; expertise and research capacity; consumer advocacy; and practical information.

Participants dislike the fees required to access information from some consumer-focused organisations.

Participants with **high trust in consumer-focused organisations** express **a higher level of scepticism** toward **those that have a potential conflict of interest,** particularly energy retailers (see below).

Independent reviews are better as I don't feel like they are trying to sell you something. They also test and try a large range of products. Man, 40-44, Western Australia, Make It Easy.

These organisations are designed to do exactly this. Research, test and provide consumers with reliable, unbiased information. Woman, 65-69, Queensland, What Next.

[Consumer-focused organisations are unlike] both government sources and energy retailers who have a particular motive to persuade consumers to take some particular action. Woman, 60-64, Victoria, Why Bother.

State or federal government

Government information sources are generally seen as reliable and accessible.

Government information is generally seen as unbiased.

I feel a Govt website should give the most up to date and impartial unbiased information. Woman, 30-34, Victoria, Make it Easy.

I think government websites tend to utilise a lot of plain English and won't push particular discounts or companies. Woman, 35-39, Australian Capital Territory, Don't Leave Us Behind.

Energy retailers

Retailers are less trusted overall than government and consumer organisations. Some participants report positive experiences with their energy retailer, when they feel the retailer has a customer-centric approach.

Most do not think retailers have a financial incentive to help consumers reduce their energy use.

My current energy supplier has been really good and have already made some great savings for me…so I'm sure that they have some other great ideas or information on lowering my usage. Woman, 55-59, Queensland, What Next.

Because they have interest to sell their products, so normally they know about the product. Man, 45-49, Western Australia, Not a Problem.

I do not trust anyone who has a financial incentive in what I choose, when looking for information. Woman, 30-34, Queensland, Not a Problem.

Message framing and priorities

We tested audience priorities around energy-reduction benefits, including:

- Control versus certainty
- Environmental benefit versus cost benefit
- Environmental benefit versus preventing outages
- Cost benefit versus preventing outages

Energy-reduction priorities

We asked research participants **which statement in the following pairs of statements best describe them and why**, to better understand their **priorities around reducing their use**, and to identify **'what matters most'** when it comes to messaging about the benefits of reducing us. **Cost saving is the number one priority**, but effective messaging should **bring together financial and environmental benefits**.

Control vs Certainty

Statement 1: **For me it's about taking control by doing the simple things that can reduce our energy bills**

Statement 2: **For me it's about certainty - I want to better understand what's driving my energy costs and have fewer surprises about energy bills**

Consumers are **evenly split on preference** for taking control on bill reduction versus having certainty through more information. But many who choose Statement 2 do so because they feel they are already doing all they can on simple actions to save.

Costs vs Outages

Statement 1: **For me it's about reducing my bills**

Statement 2: **For me it's about using less energy to reduce the likelihood of outages**

Cost reduction is more important to consumers. Almost all energy consumers prioritise the benefit of bill reduction over reducing the likelihood of outages, with little variance across segments.

Environment vs Costs

Statement 1: **For me it's about reducing my impact on the environment**

Statement 2: **For me it's about reducing my bills**

While many consumers express concern about both energy costs and the environment, **cost reduction is the top priority if forced to choose**.

However, consumers see the impact of reducing energy use on energy bills and the environment as intertwined, with the view that individual actions collectively contribute to a better future for the planet.

Environment vs Outages

Statement 1: **For me it's about reducing my impact on the environment**

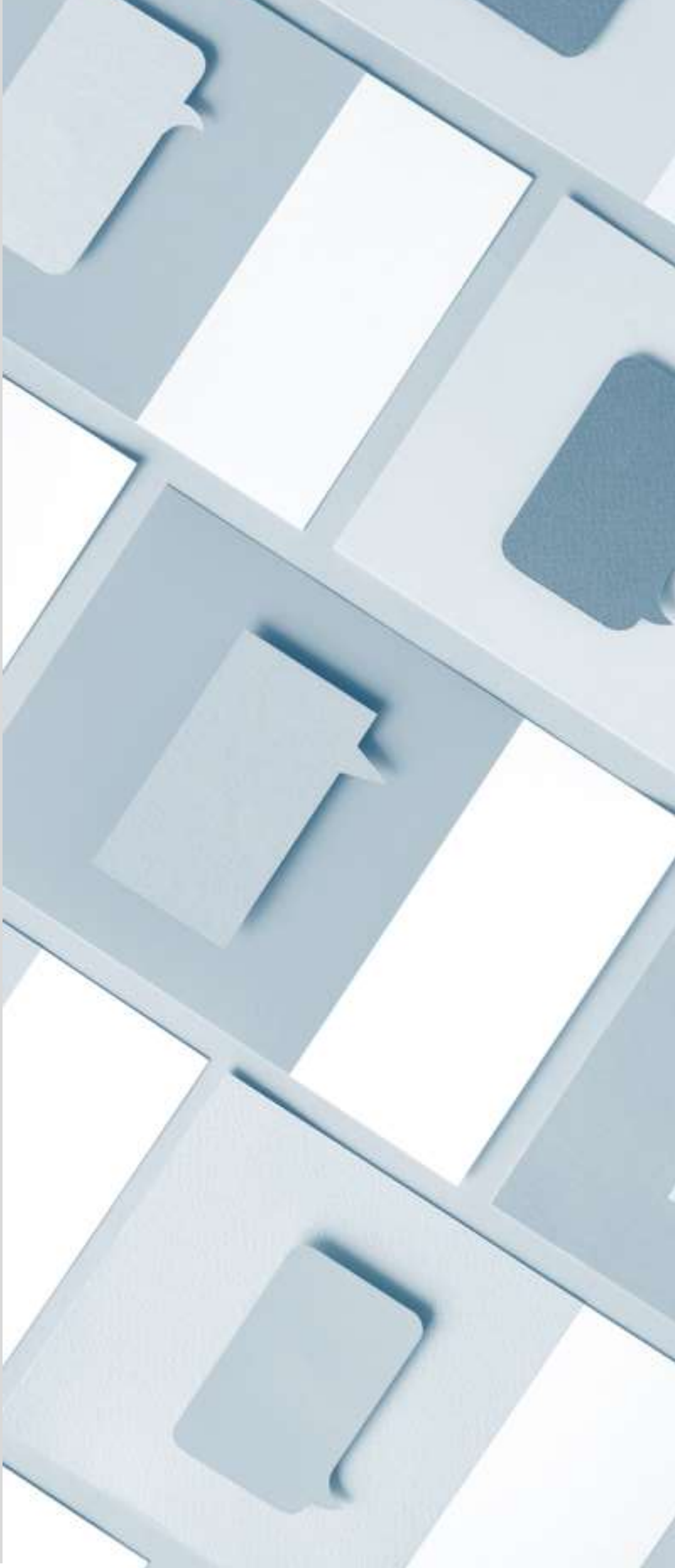
Statement 2: **For me it's about using less energy to reduce the likelihood of outages**

Consumers **almost equally prioritise** benefits to the environment and reducing the likelihood of outages.

Participants view the two issues as interrelated and believe reducing their energy use will reduce the likelihood of outages and be beneficial for the environment. However, consumers also view grid reliability as the responsibility of energy companies and government, not individuals.

Message testing

- Mocked-up adverts were used to test message appeal across audience segments.
- Concept 1 is the original message concept developed based on findings from Phase 1 of the research.
- Variations to this message were tested in Concepts 2 and 3. Variations are underlined in the following pages.
- Concept 4 provided a simplified version of the message.
- See the Appendix for the full list of concept mock-ups tested with each audience segment.



Concept 1

Resonance: Some express surprise at the potential impact of a small temperature change, while others are already aware. There is a need for clarity, such as the ideal temperature setting and potential saving. While participants tend to focus on the call to action in this message, it is noteworthy that several use the language of "one small change can make a big difference" (or a variation) in their comments, demonstrating its resonance with the audience.

Likelihood to take action: Over half would take action. Most of those unlikely to act have already adjusted their temperature settings; are renters whose bills are included in the rent; or say they need to prioritise comfort. Several express the need for clarity on optimal temperature settings and associated savings before taking action.

Positive Responses

Yes they are useful. It reminds us that a small change of a degree or two will make a difference to the power used as well as lowering bills. Woman, 55-59, Western Australia, What Next.

Yes definitely these messages are helpful to the whole family. Woman, 35-39, Queensland, Make it Easy.

That's interesting that such a small change can make such a big difference. Woman, 45-59, Western Australia, What Next.

Neutral/Negative Responses

It would be good to see an example with the numbers and impact on the bill. Man, 30-34, Western Australia, Not a Problem

Wow... how preachy and out of touch with me as a person with disability who has trouble controlling my body's temperature. Woman, 35-39, Western Australia, Not a Problem.

Concept 2

Resonance: When including a call to action based on reducing pressure on the power system, the advert resonates more with one third of participants. For participants that do not connect with the change, they tend to have significant objections, saying grid reliability should not be their problem.

Likelihood to take action: The new statement divides the audience, however the overall effect is to reduce the proportion of consumers that would take action.

Increases Likelihood to Act

Because it is not just about individual households, it is about the benefit to the community. Woman, 55-59, Australian Capital Territory, Don't Leave Us Behind.

Adds more reasons why I should be considering changing the temperature by a few degrees. Woman, 25-29, New South Wales, Why Bother.

Decreases Likelihood to Act

Well our government should have an energy system in place that is good enough for everyone already and not have to rely on us all to take pressure off it! Woman, 50-54, South Australia, What Next.

The underlined part makes me kinda angry I care about my comfort my household and my bill I don't not have a hot shower because I want to take pressure off the energy system seriously we are paying too much for the privilege anyway... Woman, 40-44, Victoria, Why Bother.

Gives me the creeps relating to the COVID-19 scares of 2020/21. I've grown to associate such language as generally being used for shaming or guilt tripping. Man, 18-24, Tasmania, Not a Problem.

Makes No Difference

I don't think it is the foremost thought to the consumer, relieving the energy system. Woman, 45-49, New South Wales, Make it Easy.

Concept 3

Resonance: Adjusting Concept 1 to include a message about the environment increases message resonance with about half of all consumers, while for about a third it makes no difference.

Likelihood to take action: A greater proportion of consumers now feel compelled to act – with a clear majority in the target segments likely to act.

Increases Likelihood to Act

The emphasis is on the benefit to me by doing one thing that also benefits the environment. Woman, 60-64, New South Wales, Make it Easy.

We all have a responsibility to look after the environment. It carries over to everything in life. Woman, 35-39, Queensland, What Next.

Saving money is always good, but if I can save money and at the same time reduce my impact on the environment, it is even better. Woman, 30-34, Queensland, What Next.

Decreases Likelihood to Act

It feels a little wishy-washy. There's so much stuff now that tells people how to "have an impact on the environment" but doesn't specify how and what the impact actually is. Woman, 60-64, South Australia, Don't Leave Us Behind.

The main thing people want is to reduce their bill, so anything that comes after 'save money' doesn't really have any impact. Woman, 70+, Queensland, Why Bother.

Makes No Difference

Again, doing 'a good deed', without really getting any personal benefit does not resonate with most people. We need to be getting something out of it ourselves before we'll be motivated to act. Man, 40-44, Victoria, Make it Easy.

I think most people already are trying to do their bit for the environment so we don't need it shoved in our faces. Woman, 50-54, South Australia, What Next.

Concept 4

Resonance: Concept 4 is a simplified and less content heavy version of Concept 1. This message resonates more with almost half of all consumers, while for two-in-five it makes no difference.

Likelihood to take action: A majority of consumers report being more likely to act while about a third are less likely to change their behaviour.

Increases Likelihood to Act

Less writing makes it easier to take in the information. Woman, 25-29, South Australia, Make it Easy.

Like this one…no guilt trips or anything to do with making people feel bad for trying to keep cool or warm. Man, 50-54, Tasmania, Why Bother.

It is more straightforward and quicker to read. More likely to keep attention. Woman, 35-39, Queensland, What Next.

Decreases Likelihood to Act

It's like saying the other thing only in reverse, but strangely resonates less. Man, 30-34, Western Australia, Not a Problem.

In regional locations, heating and cooling are not our main source of energy usage[…] Overall it's the running costs of the fridge/freezers, light, outdoor pumps, tools that people forget about. Man, 55-59, South Australia, Don't Leave Us Behind.

I preferred the more informative version. Man, 60-64, Australian Capital Territory, What Next.

Makes No Difference

The initial message is still conveyed, maybe just with less emphasis points to help sell it. Man, 35-39, Queensland, What Next.

It still isn't enough information for me about how much of an impact it will have on my electricity bill. Woman, 60-64, Queensland, Make it Easy.

Appendix

- Message concepts by segment
- In-depth audience segment profiles
- Discussion boards overview

Message concepts by audience segment

<table>
<tr><th></th><th>Concept 1</th><th>Concept 2</th><th>Concept 3</th><th>Concept 4</th></tr>
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1. What next? (18%)

Characteristics

- **Lowest number of barriers.**
- High level of trust in government.
- More likely to be homeowners and live in a freestanding home.
- Higher likelihood of government support and in a low-income band (retirees).
- Most likely to be over 60 and a mature single or couple.

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 want to know what else we can do.

The environment is very important to us, alongside affordability. To encourage us to change our behaviour, we want detailed information to convince us and tangible steps we can take for bill-saving.

Motivation	Ability	Opportunity
• High level of motivation.	• Have already taken a range of actions. • Low barriers to act.	• High opportunity to act. • Likely to have access to funds to invest.

Energy Use & Costs	Actions & Barriers	Information Needs & Sources
• Concerned about rising energy costs due to low income. • High energy users due to entertainment devices, appliance use, and cooling and heating despite trying to be careful. • Implement energy saving strategies, but worried not much can be done to offset cost increases. • Concerned about knock-on effect of rising energy costs to businesses which increase costs to consumers.	• Energy conscious and able to take steps to reduce consumption. • Communicate saving strategies to family members (e.g. children in household). • Motivated to act due to rising costs and financial stress, as well as climate impact. • Barriers include costs; feeling that they are already doing all that they can; and lack of buy-in from other household members.	• Want to know about costs vs savings for energy saving appliances, solar, other investments. • Want to know about the energy system transition and capability of network renewable energy. • Search for information primarily begins with Google search, followed by comparison and government sites. • After reliable information and open to learning from others (community forums, and word-of-mouth). • See government and comparison sites as reliable and accurate. Retailers are trusted source as selling a service or product.

2. Make it easy (20%)

Characteristics

- Most likely to be families with children.
- **Highest number of reported barriers.**
- Higher income band.
- Highest level of university graduate qualifications.
- Highest level of home loan / mortgage.
- Highest likelihood of language other than English spoken at home.

Everything is becoming more expensive and to make matters worse our mortgage payments have increased a lot. We just don't have much left 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 change our energy usage if it makes a financial difference to us. We care about the environment but have to prioritise costs. We need information on energy-saving. Simple, straight forward messages are most effective as we don't have time to do research.

Motivation	Ability	Opportunity
• Medium level of motivation.	• Have already taken many actions but not sure what else to do. • Concerned about ability to influence household behaviour.	• High proportion of families. High numbers with a mortgage, with limited funds for energy saving investments. • Seeking government support to help make substantial changes.

Energy Use & Costs	Actions & Barriers	Information Needs & Sources
• Rising costs front of mind with salaries not keeping up with rate increases. • Feel use reduction is difficult in hot climates and/or when living in units (e.g. solar inaccessible). • Solar panels have alleviated financial pressures for some. • Conscious of energy use in the home (including work from home or hybrid work), and overall environmental impact. • Do not know best ways to cut down on energy use, or how to get buy-in from other members of household.	• Most actions involve cheap and easy steps to saving energy, with a minority installing solar panels. • Cost saving is a priority,, followed by environmental impact. • Barriers to change are upfront costs for large-scale measures and new appliances; lack of time and information gaps (e.g. information about rebates have caused confusion about best time to invest in solar). • Renting and living in remote locations are further barriers for cost-saving measures like solar and appliance upgrades. • Environmental impact (e.g. waste and landfill) is a concern when considering appliance upgrades.	• Want detailed information on energy use and costs, and practical energy-saving tips for daily household chores. • Information searches begin with Google, followed by word-of-mouth (social media) and provider (for energy use breakdown). • Require detailed information relevant to them. • Want sources to be current and unbiased. • In high need of information and support - open to all sources, including consumer organisations, government, and energy retailers.

3. Don't leave us behind (23%)

Characteristics

- High level of renting.
- High level of apartment and high-rise living.
- High level of receiving government support payments or benefits.
- High interest in knowing more about bill-reduction strategies.

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.

Rising energy prices concern us a lot and we want to reduce our energy usage if it makes a difference to our bill. We are already taking the easy steps to save, but we're being outpaced by increasing rates. The environment is not top of mind when we're just trying to make ends meet. Having a reliable and cost-effective power supplier is important to us.

Motivation	Ability	Opportunity
• Medium to high level of motivation.	• Some concern about ability to influence household behaviour. • Unsure what else to do beyond low/no cost actions.	• Limited opportunity due to living circumstances. • Limited funds to invest. Seeking government support to help make changes.

Energy Use & Costs	Actions & Barriers	Information Needs & Sources
• Rising cost of living and increasing energy costs are primary concerns. • Environmental concerns less of a priority due to cost-of-living pressures. • Highly concerned about reducing use but feel outpaced by increasing retailer rates. • Limited financial capacity to invest in solar. Some who have capacity are not seeing anticipated return. • Using high-energy appliances, such as air-conditioning or heating, are now viewed as luxuries.	• Will attempt major reductions even at the expense of comfort. • Areas of focus include: changing appliance use behaviours (off-peak times); shorter showers; minimising use of laundry appliances and air-conditioning. • Barriers include lack of funds to invest in energy-saving measures; renting; and buy-in from household members. • Many believe they are doing all that they can to cut back.	• Require easy to understand (e.g. step-by-step guides) and low or no-cost actions to reduce use. • Prefer easy to access information available in one place. • Want energy provider cost comparisons and costs associated with appliances and time of use (peak versus off-peak). • Use of a range of information sources, including government sites, comparison sites and online forums. • Open to information from all reliable and easy to follow sources for best solutions.

4. Why bother (16%)

Characteristics

- More likely to be young singles or couples or in shared living arrangements.
- Highest number of people aged 18-39 years.
- Highest level of home loan or mortgage.
- Highest level of trust in online blogs or posts on forums or social network sites.

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?

We want to have control of our energy use through simple and manageable actions but are not sure where to find information on what to do.

Motivation	Ability	Opportunity
• Low motivation to act. • Not sure the benefit will be worth the effort.	• High number of perceived barriers to act.	• Renting and share households limit ability to influence household behaviour. • Some concern about financial capacity to implement changes.

Energy Use & Costs	Actions & Barriers	Information Needs & Sources
• Concerned about rising energy costs and monopoly by providers driving price increases. • Concerned about the impact of energy generation on the environment and climate. • Despite concerns, unlikely to implement or invest in strategies to reduce use or increase efficiency.	• Difficult to get buy-in from others in household to become more energy efficient. • No-cost and easy-to-do efficient behaviours are primary strategies (e.g. turning off lights and devices, using cooling less frequently – though undermined by hotter days). • Main barriers are costs, time to research and implement solutions, and comfort – do not want to ‘live without’. • Believe not much can be done and/or unsure what to do - open to clear and easy-to-follow information on cheap and accessible solutions.	• Uncertainty about where to go for information. • Require information on easy-to-implement solutions and which solutions have the most savings, especially those on lower incomes. • Need ‘how to’ and cost-benefit detail e.g. comparative provider costs, best time of day to use appliances, breakdown of appliance use costs, and - for some - solar ROI. • Need information to enable buy-in from other household members. • Information searches begin with Google, as well as with provider and government sites. • Most trusting of consumer-focused organisations and energy retailers, but open to all sources that appear unbiased.

5. Not a problem (23%)

Characteristics

- More likely to be a young single.
- Lower level of trust in government and energy market regulators.
- Least likely to have searched for information on bill reduction strategies.
- Lowest level of concern about rising energy costs.

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'll install something new – like solar or a new appliance – only if I have to, like if the old one breaks.

We're not overly concerned about how we use energy as comfort is important, but rising energy costs are a worry. It is what it is.

Motivation	Ability	Opportunity
• Low motivation to act. Lowest level of concern.	• Highest level of inaction despite high level of ability to act.	• Medium opportunity to act.

Energy Use & Costs	Actions & Barriers	Information Needs & Sources
• Express some desire to use energy wisely to keep the bills down and not waste resources. • However, place high level of importance on comfort. • See energy cost increases as part of a broader range of cost-of-living increases.	• Some have implemented cheap cost-saving solutions such as using appliances during off-peak times and decreasing air conditioner use. • Higher cost adaptions are less likely to be an 'active' choice (e.g. solar installation for new build, new energy efficient whitegoods when older appliances breakdown). • Need to be convinced that the effort is worth the time or the financial investment.	• Not a priority target. • Some will still benefit from information on energy use and costs, as well as cost benefit analysis. • Information on technology resources (e.g. real-time smart meters) is useful. • Searches for information primarily begin with Google, followed by government and retailer sites. • Some scepticism across all information sources. Need trusted information before taking the leap on large-scale changes.

Discussion board overview

Segment Name/Cluster	N Boards	Demographics by Board		
What Next (18%)	2	**Board 1** Under 60	**Board 2** 60 and over	
Make it Easy (20%)	3	**Board 3** Freestanding home Family: Oldest child under 6; Oldest child 6 – 15 Culturally and Linguistically Diverse: minimum 2 participants	**Board 4** Freestanding home Family: Oldest child over 15 Culturally and Linguistically Diverse: minimum 2 participants	**Board 5** Apartment or townhouse Family: Oldest child under 6; Oldest child 6 – 15; Oldest child over 15 Culturally and Linguistically Diverse: minimum 2 participants
Don't Leave Us Behind (23%)	2	**Board 6** Private rental market Aboriginal and/or Torres Strait Islander: minimum 2 participants	**Board 7** Renting public housing Aboriginal and/or Torres Strait Islander: minimum 2 participants	
Why Bother (16%)	2	**Board 8** Young single or couple	**Board 9** Living with friends (share household)	
Not a Problem (23%)	1	**Board 10** Any classification		

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Any questions about this report?

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