Power2People

A survey assessing engagement of European residential customers in the energy transition

A representative sample of European residential energy consumers and energy suppliers

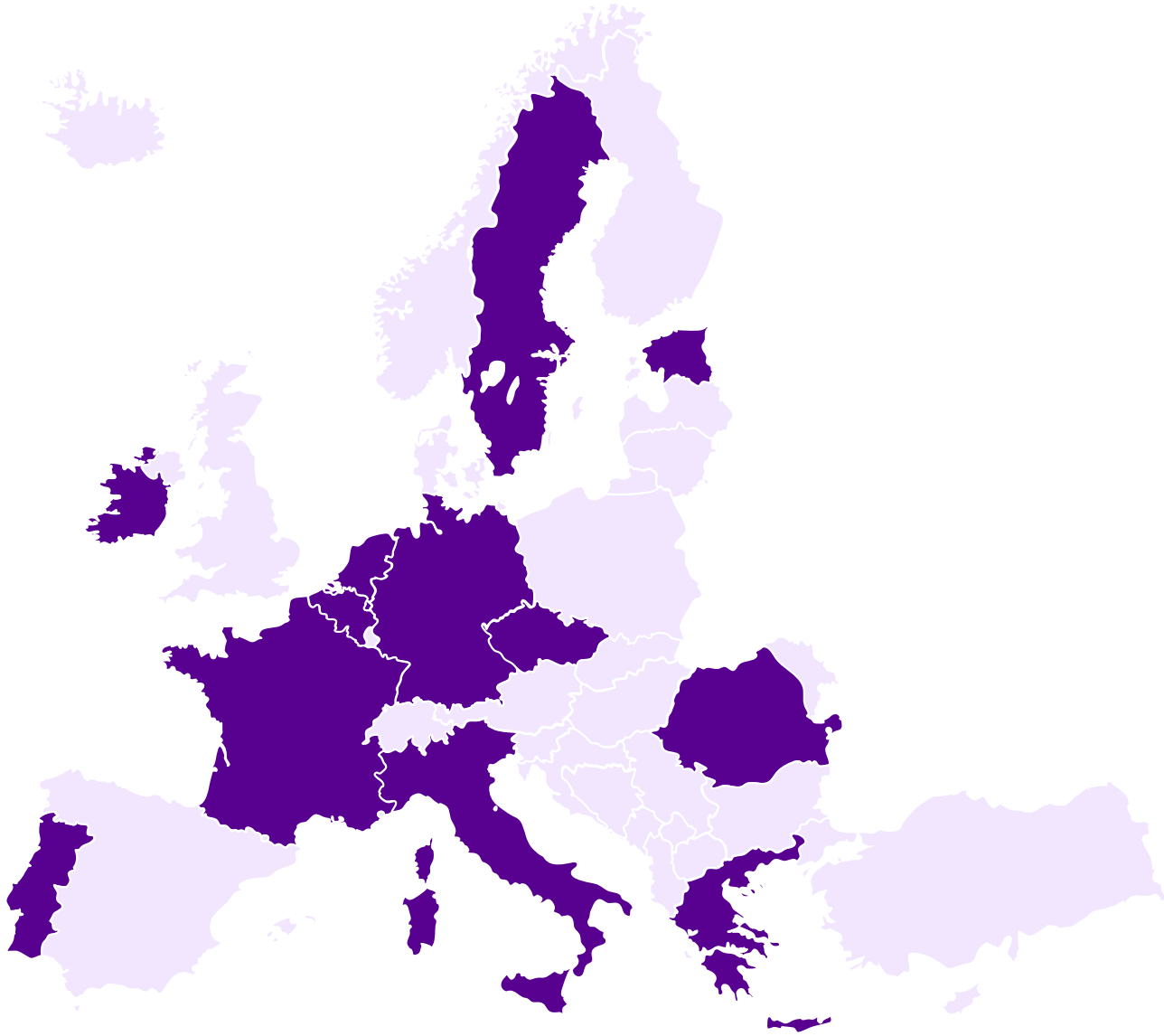
2,5k Consumers

in

12 Countries

and

66 Energy Suppliers



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Overall, European energy consumers feel that they have more choice and control over their energy use and a better experience when interacting with their energy supplier than 12 months ago

> The group of consumers that have seen a positive change in these areas is two to three times larger than those that have seen a reduction

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Energy suppliers have boosted their customer engagement efforts and consumers are taking note

Consumer survey: n=2,439 (All respondents). Supplier survey: n=[51-66] – the base varies as some questions were skipped by respondents

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5 main drivers of the positive consumer perception of choice, control and experience

#1

Awareness is on the rise

47% aware of their supplier's offerings to help control energy cost; of which 50% have also adopted them

#2

High supplier choice and rising switching rates

31% switched energy suppliers in the past 2 years

#3

Better interaction with energy suppliers

78% of suppliers increased efforts in customer experience

#4

Expanding adoption of clean energy tech

18% PV owners, 5% EV owners, 37% use smart energy devices

#5

High satisfaction with new energy solutions

+80% satisfaction

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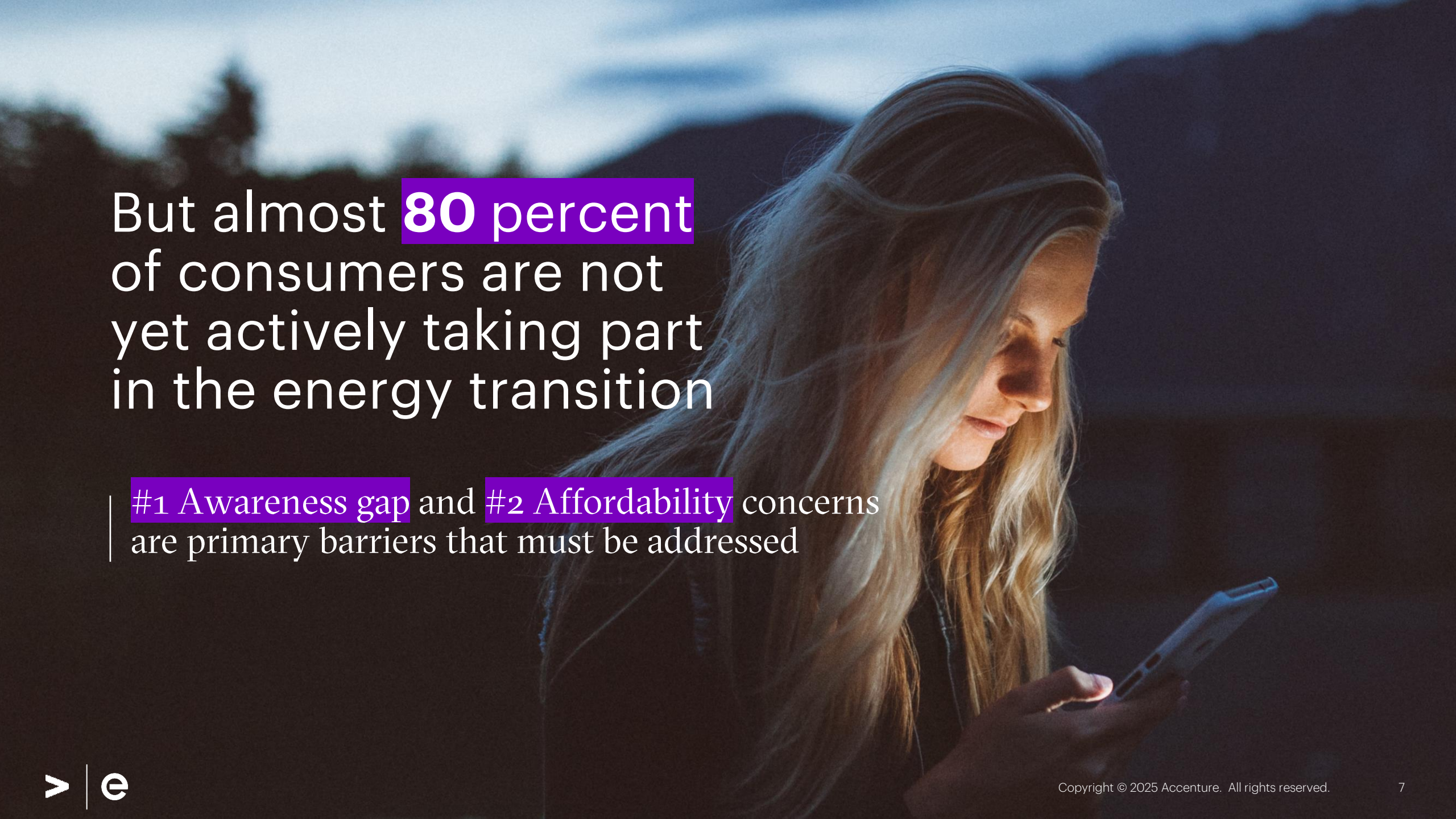

But almost **80** percent of consumers are not yet actively taking part in the energy transition

> #1 Awareness gap and #2 Affordability concerns are primary barriers that must be addressed

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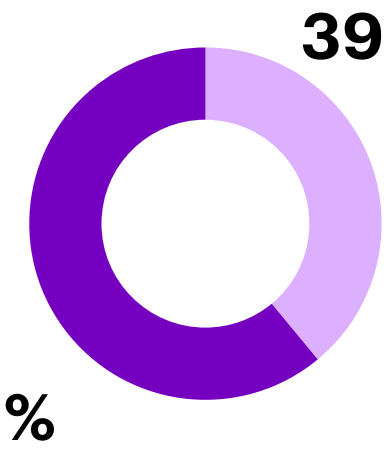
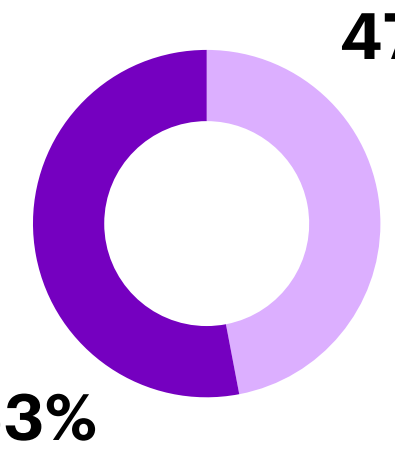
#1 Knowledge gap hinders participation

Solutions to generate, store or electrify energy use



About 2 in 5 consumers are aware of supplier's new offerings to generate, store or electrify energy use - meaning 6 in 10 remain unaware

Solutions to better control and save on energy bills



Just under 1 in 2 consumers know about solutions to help manage energy costs—leaving roughly half still in the dark

Aware Unaware

Consumer survey: n=2,439 (All respondents).

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#2 Rising energy costs have led to more consumers who feel less in control over their energy bills

More than 1 in 10 consumers reported feeling less in control of their energy costs, a sharp increase since 2021…

… And the top one reason for this is the rising energy costs

+3pp

11% Number of consumers who reported **feeling less in control** of their energy costs than 12 months ago

+10pp

32% My energy costs have increased

13% My financial situation has worsened

11% I am not an owner and can't take cost control measures

Consumer survey: n = 2,439 (all respondents). Sample size varies for follow-up questions — e.g., "Reasons for feeling less able to control your energy costs," n = 270.

increase vs. 2021
(Change shown in percentage points)

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#2 Concerns that electric solutions are too expensive are the top barrier mentioned across all categories

81% care about their impact on the environment, but typically engage through simple actions*

Top 3 reasons holding consumers back from switching to electric product and services

	Home energy generation	Heating	Electric mobility	Energy Storage
#1	**28%** Too expensive	**29%** Too expensive	**40%** Too expensive	**24%** Too expensive
#2	**28%** Not allowed to do that	**23%** Happy with current system	**13%** Not interested	**17%** Installation does not allow it
#3	**8%** Not considered	**12%** Installation does not allow it	**9%** Not a priority	**10%** Not interested

The sample size of the consumer survey varies by follow-up question: Home energy generation: n= 1,761; Heating: n=1,519; Electric mobility: n=1,772; Energy storage: n=1,783
* Examples: 68% use energy-efficient bulbs, 55% reduce usage, 47% buy efficient appliances

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We must recognize the diversity of consumer landscape to drive meaningful engagement in the energy transition

Engaged	Undecided	Disengaged	Constrained
Environmental concern			Constraints
25% **Eco-Warriors**	**56%** **Convenience seekers**	**5%** **Environmental skeptics**	**31%** **Cost-constrained**
Attitude towards technology			
21% **Tech-Savvy**	**40%** **Cautious tech adopters**	**34%** **Change-resisters**	**22%** **Infrastructure-limited**

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Three calls for engagement to the wider ecosystem for empowering European households in the energy transition

Energy Suppliers

Aggregators

Energy services companies

Energy system & regulation ecosystem

Consumer organisations

Governments & local authorities

TSOs & DSOs

Regulators

New energy solution ecosystem

Technology manufacturers

Automotive companies

Installers

Financial institutions

#1

Flexible contracts offer a clear path for consumers to lower energy bill and gain greater control

#2

Smart energy tech can be an effective way to assist consumers in managing energy costs

#3

A **targeted engagement and support** can bring everyone on board

Energy Consumer

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Thank you

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