Power2People

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

Reaffirming & advancing the commitments to residential customers to support them in their energy transition journey

Power2People: Survey assesses how residential customers engage in the energy transition

During 2024, Accenture and Eurelectric surveyed energy consumers and suppliers across Europe to gather insights in the current energy market. This study integrates their perspectives.

Consumers: More than 2,000 residential customers in 12 countries shared views on their energy use. Samples are broadly nationally representative.

Suppliers: Over 60 energy suppliers provided input on actions taken since 2021 to support residential customers and the ongoing challenges they face.

Focus of this report

Power2People: 5 commitments to support residential customers in their energy transition

Insights from consumer and energy supplier surveys informed roundtable discussions with key players across the energy ecosystem. These discussions shaped supplier commitments and policy recommendations.

Ecosystem players: More than 60 participants—including regulators, consumer groups, technology providers and grid operators—used survey insights to address barriers to consumer engagement.

Suppliers: Over 70 energy suppliers from various countries participated in the roundtables and formulated new commitments.

This comprehensive lens offers a clear view of progress—and highlights opportunities—to empower residential customers in Europe's clean energy transition..

Read the report here

* 66 energy suppliers from the EU, of which 45% operate in more than one Member State.

Europe's energy landscape has transformed, calling for a renewed focus on customer commitments from energy suppliers

Why have Eurelectric and Accenture conducted this survey?

Since Eurelectric's 15 Pledges to Customers in 2020 and our first residential energy consumer study in 2021, the energy landscape has undergone a profound transformation. The combined impact of the energy crisis, COVID-19, acceleration of renewable integration and electrification has not only reshaped the system but also consumer attitudes, expectations and behaviors.

The energy crisis and COVID-19 brought the energy trilemma into focus:

Supply chain disruptions raised awareness of energy security, soaring prices underscored affordability challenges, and the need for a cleaner system reinforced the focus on sustainability.

Today, consumers are more aware of energy issues—and active in solving them—than ever before.

The rise of renewable supply calls for greater consumer engagement:

As energy systems increasingly rely on intermittent renewable energy sources, maintaining grid balance requires consumers to adopt new consumption patterns.

An engaged consumer is no longer a nice-to-have—it is a must-have to ensure a stable and resilient energy system.

Electrification is central to the EU's decarbonisation and energy resilience strategy:

Electrification is not only the most cost-effective and scalable pathway to reduce emissions—it also enables flexible demand.

But this can succeed only if consumers are part of the equation: electrifying their homes, vehicles and appliances, and embracing new habits and technologies that support the energy shift.

Eurelectric and Accenture have collaborated once more in 2024 to evaluate the changes in consumer behavior, engagement in energy transition and their perception on the progress made by energy suppliers to empower their residential customers in the energy transition.

Contents.





Executive summary

The opportunity: Residential energy consumers are increasingly aware and open to engage in energy transition

Consumers are showing growing awareness and agency in their energy choices.

- Nearly 1 in 2 consumers are aware of their energy supplier's offerings to better manage their energy bill, and 28% feel more in control — primarily thanks to tips and advice from energy suppliers.
- Switching is also on the rise with 31% of consumers changing their energy supplier in the last year (+8pp since 2021), reflecting the competitiveness of retail energy markets.
- Consumers report perceiving a better interaction with their energy suppliers who are addressing their essential needs.
- Adoption of clean technologies such as solar panels and electric vehicles has more than doubled since 2021.
- Importantly, satisfaction is very high among adopters, showing strong potential for scaling positive engagement.

The barriers: Awareness gap and affordability concerns lead to limited action

78% of consumers are not yet actively participating in the energy transition.

- While awareness grew, a clear gap remains. Less than half of consumers are aware, the majority are not — making this a significant barrier to engagement.
- Affordability also continues to hinder progress — both in terms of managing energy bills and investing in new solutions. Upfront costs are the top barrier to adoption across products and services for direct electrification.
- Even environmentally conscious consumers often limit action to low-cost energy-saving habits like LED lighting or reducing usage, due to cost concerns or perceived impact of their actions.

The Call for Engagement: Flexible contracts with tailored tools and inclusive approaches can unlock more consumer engagement in the energy transition

There are three main calls to engagement towards the wider energy ecosystem that can drive meaningful household participation in energy transition:

- First, flexible contracts offer a clear route to cost savings and control, with 2 in 3 consumers interested in switching.
- Second, smart technologies (apps, thermostats, devices) can help manage costs, but adoption requires building trust, especially for the majority who are cautious or tech-resistant.
- Finally, targeted engagement is essential: messages and support must be tailored to generational, digital, financial, and environmental profiles to ensure inclusive and equitable participation.

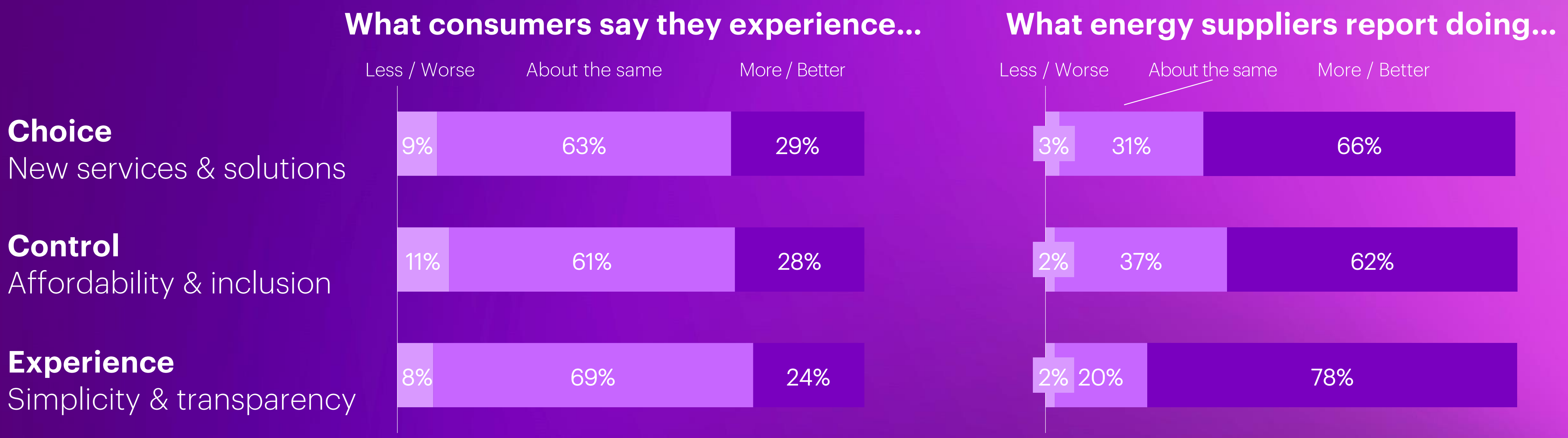
Overall, European energy consumers feel that they have more choice and control over their energy use and a better experience when interacting with their energy supplier than 12 months ago

> 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

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

More than a quarter of consumers reported more choice of services and solutions and felt more in control over energy usage and costs while just over one in five found the experience simpler and more transparent. The group of consumers that have seen a positive change in choice, control and experience is two to three times larger than those that have seen a reduction in these areas.

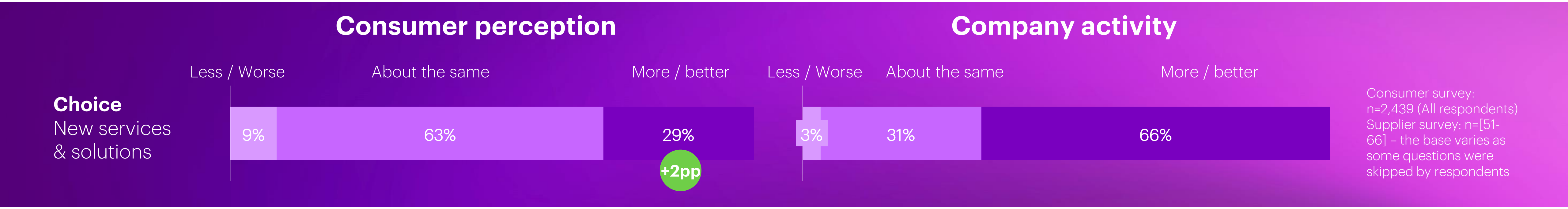
A vast majority of European energy suppliers have ramped up consumer engagement efforts. 78% have invested in improving the user experience, while two-thirds have further expanded their product and service options for new energy services and 62% have worked on improving their customers' ability to control energy usage and cost and make it more affordable.



Choice expands, but awareness remains low, pointing to a clear opportunity to close the knowledge gap

28% of consumers report seeing more choice, and this group is three and a half times bigger compared to those who say they have perceived less choice. However, only 39% of consumers are aware of what their energy supplier provides, pointing to a knowledge gap. Among those who are aware, adoption has increased, and satisfaction remains consistently high compared to 2021.

Energy suppliers have made significant efforts to broaden their offerings for direct electrification, with 66% reporting they now offer more products and services to help consumers generate, store, or electrify their energy use.



39% of consumers are aware of their supplier's offering of new products and solutions that give them more choice in how they meet their home_energy needs

31% – 55% of consumers that are aware of these new & solutions have adopted them (+17pp*)

80% – 91% of consumers that have used these new products & solution are satisfied

76% of suppliers offer products and services for solar (PV) panels, home batteries, home energy management, heat pumps or other equipment to generate and store energy

● increase vs. 2021
(Change shown in percentage points)

* Comparison is made at an aggregated level, based on a basket of services that has slightly evolved since 2021.

Many energy suppliers have expanded their offer to help consumers take more control of their energy bill and consumers are increasingly adopting it with high level of satisfaction but 11% of consumers still feel less in control

The vast majority of consumers feel a similar or improved level of control of their energy bill. Nearly half of consumers are now aware of their energy supplier's offerings to help control energy costs, and many have adopted them, a notable increase compared to 2021. Engaged consumers also report very high satisfaction rates. However, 11% feel less in control of their energy bill.

Nearly two-thirds of energy suppliers have expanded tools to help consumers better manage and reduce their energy bills. The energy crisis has led to an increased focus on affordability by energy suppliers as energy costs remain a major concern.

Consumer perception

Company activity

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

+8pp **47%** of consumers are aware of their suppliers' offering of new products & solutions that help control energy cost

+6pp **49% - 58%** of consumers that are aware of these new products & solutions have adopted them

81% - 92% of consumers that have used these new products & solutions has found them helpful

90% of suppliers offer advice and tips about how retail customers can save costs on their energy bill based on their personal situation

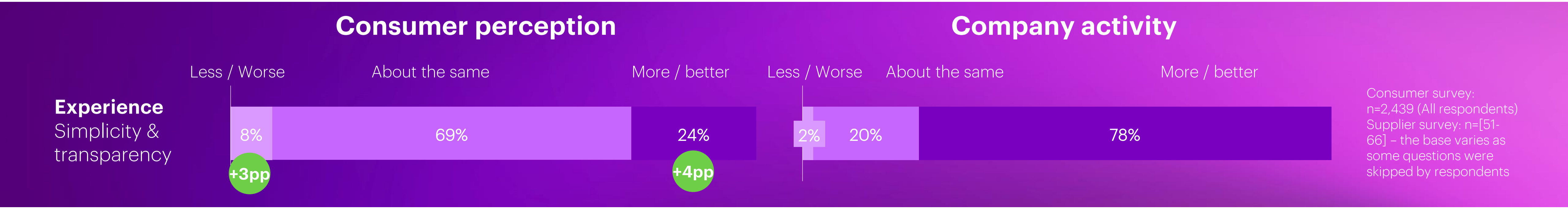
+5pp **44%** of suppliers offer guidance towards relevant support schemes and local actors, in cooperation with governments and social services

increase vs. 2021
(Change shown in percentage points)

Energy suppliers continue to invest in better customer service experience in line with energy consumers’ essential needs for simplicity, predictability and trust

About one in five consumers perceive a better experience when interacting with their energy supplier, whereas nearly 1 in 10 feel their experience has worsened. Consumers are giving major importance to experience drivers that meet their basic needs for more simple, transparent and user-friendly products and services such as predictable bills.

Energy suppliers have maintained their investments in offering clear, transparent and consistent information, user-friendly tools and better service.



79% of consumers highlight the importance of their energy supplier providing **responsive, friendly and personal customer service**

79 % of consumers highlight the importance of their energy supplier ensuring their **energy bill is predictable every month**, so they know what to expect

78% of consumers highlight the importance of their energy supplier ensuring that consumers can easily specify how their **personal data may or may not be used**

92% of suppliers provide **clear, transparent and consistent information** on their offers, contracts and bills

69% of suppliers offer **user-friendly products and services** with easy opt-in and opt-out

increase vs. 2021

(Change shown in percentage points)

There are five main drivers of the positive consumer perception of choice, control and experience

#1

Consumers feel increasingly in control of their energy use, primarily thanks to energy suppliers' efforts.

28% of consumers feel more in control of their energy use; among them, 43% say this is primarily thanks to the tips and advice, mainly provided by their energy suppliers.

Nearly 1 in 2 consumers are now aware of their energy supplier's offer to better manage their energy bill

#2

High supplier choice and rising switching rates—driven by cost-conscious consumers—signal a healthy, competitive energy market.

European consumers can choose from an average of 138 nationwide energy suppliers, reflecting the competitiveness of retail energy markets.

Consumers are increasingly engaged—31% switched energy suppliers in the last 2 years mainly driven by cost, an 8-percentage-point increase since 2021—demonstrating growing awareness and proactive behavior.

#3

Consumers experience a better interaction with their energy suppliers who are addressing their essential needs.

Energy suppliers are prioritising customer experience, with 78% reporting increased efforts or investment in this area. Consumers value the basics in their energy experience and suppliers are meeting those expectations. Consumers are emphasising products and services that meet their basic energy needs, centered around autonomy, simplicity, trust, transparency, and affordability.

#4

Clean tech adoption is accelerating, with solar panel and EV uptake rising sharply since 2021.

Adoption of new energy solutions is accelerating, ownership of solar panels (PV) and electric vehicles (EVs) has more than doubled compared to 2021, with 18% of consumers owning PVs and 5% owning or leasing an EV. In addition, 37% of consumers use smart energy devices to better control and manage their energy use at home.

#5

High satisfaction with use of new products and services that energy suppliers provide.

Consumers who adopt new energy products, such as solar panels and water storage heating systems, or services such as installation services or expert advice — report high satisfaction, with 80–92% finding them useful.

#1 Despite energy crisis, consumers feel in control of their energy use

Consumers are feeling more in control of their energy consumption

28% +6pp of consumers are feeling more in control of their energy consumption. This group grew by 6pp since 2021

Advice and tips, mainly coming from energy suppliers, are the main driver of this positive change

What is the main reason that you feel more able to control your energy costs?

43% +11pp Advice, tips and products to reduce my energy bill*

* 43% is a combined total: 27 % for advices and tips coming from supplier and 16% for those proposed by other players.

Consumer survey: n=2,439 (All respondents). Sample size varies for follow-up questions: n=676.

increase vs. 2021
(Change shown in percentage points)

Advice and tips from energy suppliers are the key factor helping consumers feel more in control of their energy bills.

#1 Consumer awareness of energy suppliers' offering of products and services that help control energy cost has grown notably since 2021

Awareness is on the rise

47% +8pp of consumers are aware of their suppliers' offering of new products & solutions that help control energy cost

… and consumers have switched on to adopting solutions that help them control their energy bill, likely accelerated by energy crisis

When consumers are aware, nearly 1 in 2 has adopted these solutions

Have you made use of the services of your energy supplier in these areas over the past 12 months?

	Help me find the right support from government or social services in case I am unable to pay my energy bill	Advice and tips about how to reduce energy bill based on my personal situation	Offer me products and services to reduce energy use and save costs
Consumers	58%	50%	49%
% of suppliers offering the solution	44%	90%	75%

Consumer survey: n=2,439 (All respondents). Sample size varies for follow-up questions: n=[236–567].
Supplier survey: n=[51-66] – the base varies as some questions were skipped by respondents.

increase vs. 2021
(Change shown in percentage points)

#2 Control in Action: More consumers are switching to save

Nearly one in three consumers report having **switched suppliers** in the past two years **mainly to save money** —up 8pp since 2021.
One in four plan to switch in the next year, **driven mainly by cost savings.**

European retail energy consumers can choose from a growing number of energy suppliers…

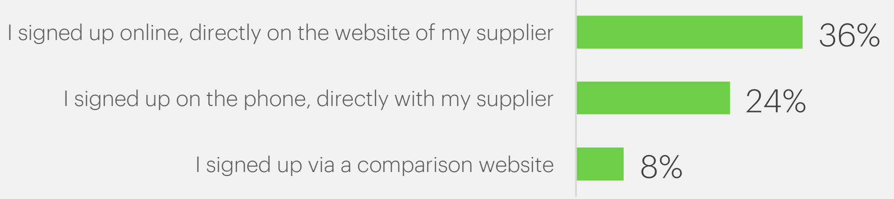
138 The average number of active nationwide energy suppliers in the household electricity market of EU countries in 2022.[1]

…and they are also exercising this choice with increased rates of supplier switching

Switchers typically sign up using digital channels.

31% +8pp
Switched supplier in the past 24 months

How did they sign up to their supplier's offer?



n=2,439 (All respondents)

Reasons to switch are primarily driven by cost.

What was the most important reason for switching electricity supplier?

40% To save money

19% Attractive incentives/discounts offered by new suppliers

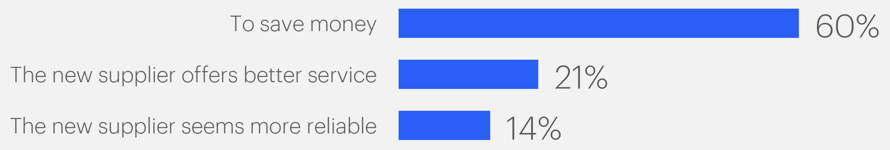
n=754 (All respondents who have switched electricity suppliers)

Future intentions to switch supplier remain strong …still mainly driven by cost, and to some extent by better service

This underscores why empowering consumers with better deals and clearer value is key to boosting engagement across the energy transition.

25% +4pp
Likely to switch supplier in the next 12 months

What are the main reasons why you think you will switch energy suppliers in the next 12 months?



n=600 (All respondents who are likely to switch electricity suppliers in the next 12 months

increase vs. 2021
(Change shown in percentage points)

[1] As of 2022, there were 3,731 active electricity suppliers serving final consumers across the EU-27, resulting in an average of approximately 138.2 suppliers per country. This figure includes all registered suppliers active in household markets, including those operating in more than one national market. Source: Eurostat, Electricity Market Indicators (2024)

#3 Consumers are focusing on meeting their essential needs when it comes to energy use and interactions with their energy supplier

Consumers prioritise five key drivers for positive energy experience:

% Consumers highlighting the importance of their energy supplier in...

79%	Autonomy	Providing responsive, efficient and **personal** customer service and tools to make smart choices
78%	Simplicity	Ensuring my energy bill is **predictable** every month so I know what to expect
79%	Trustworthy	Ensuring the **security** of my personal data (view and specify how my data can/can't be used)
76%	Transparency	Provide **insights** into my energy use
75%	Affordability	Helping me **save** on my energy bill

Consumers value the basics in their energy experience, centered around autonomy, simplicity, trust, transparency and affordability.

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

Energy suppliers prioritise on good customer service that meet consumers' essential needs

Areas where energy suppliers invested most (top3):

Provides responsive, friendly and personal customer service	96%
Provides clear, transparent and consistent information on their offers, contracts and bills	92%
Ensure that consumer data are kept secure and give consumers full control its use	75%

#4 Adoption of clean energy solutions by households is growing

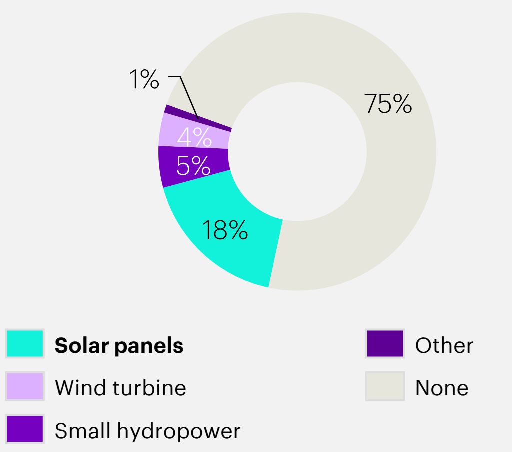
Adoption of new clear energy solutions by households —such as solar panels and Electric Vehicles —is growing, but overall uptake remains limited

Adoption of clean tech energy solutions is growing
(Top 5 - percentage of respondents that own or lease):

18%	17%	14%	9%	5%
x2				x2.5
Solar panels (18% vs 9 % in 2021)	Electric heating system	Water storage heater*	Home battery storage*	Electric vehicle (5% vs 2% in 2021)

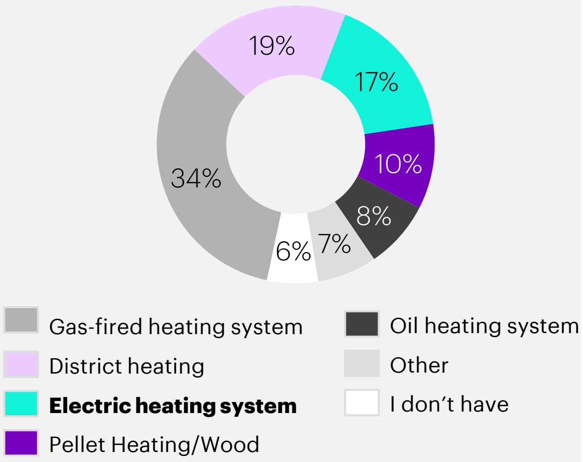
Across categories

Home energy generation



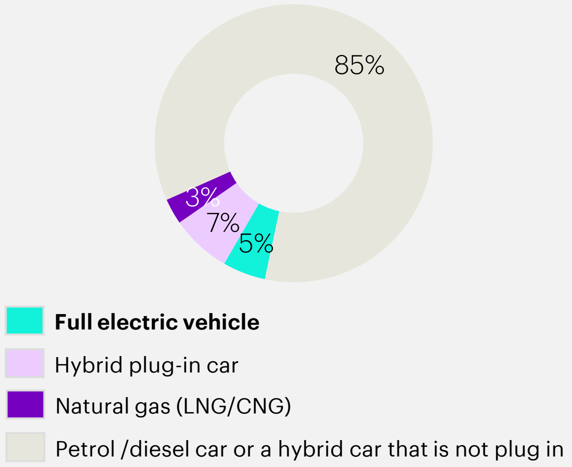
Solar panels now in 18% of homes, but 75% report no generation solution—huge opportunity remains.

Heating



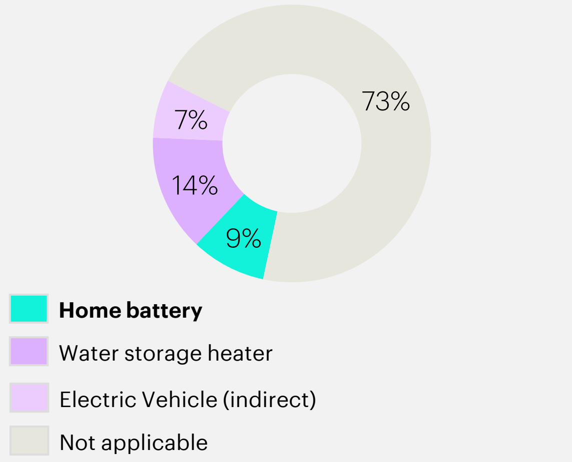
Gas and oil dominate heating; electric systems still under 20% with similar penetration as in 2021 despite growing emphasis on heat pumps

Electric mobility



85% still drive petrol/diesel. Only 5% fully electric—despite 2.5x growth

Energy Storage



Battery adoption lags (9%) despite solar panel growth. Storage remains a weak link.

Consumer survey: n=2,439 (All respondents).
*These solutions were not asked in the 2021 survey.

#5 Consumers are highly satisfied with their energy supplier's products and services after adoption

Home energy generation, management & electric mobility

80-91%

of users found the products & services of their energy supplier useful

Energy saving & access to financial support

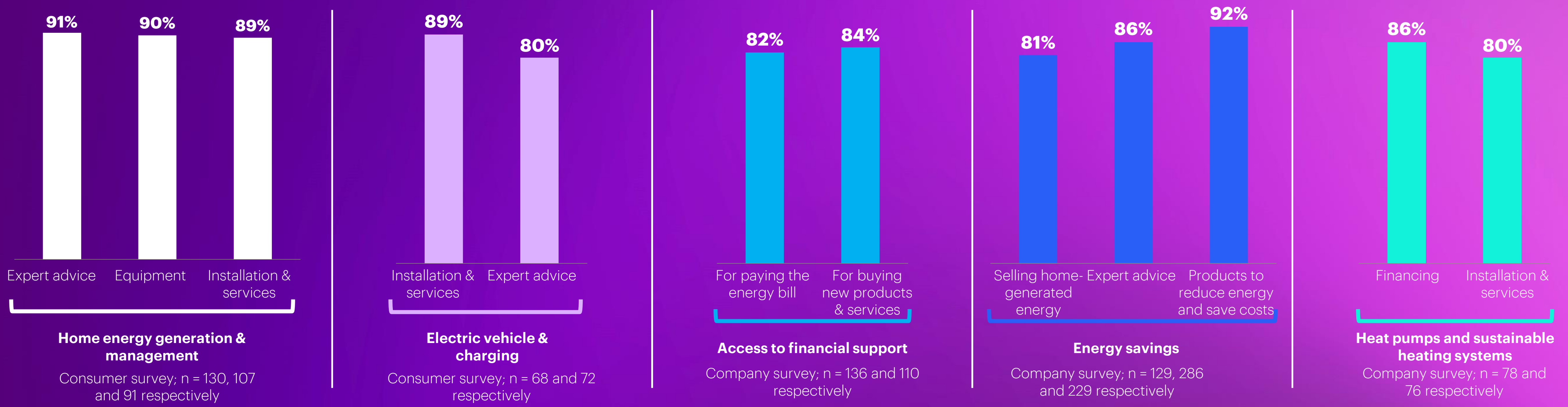
81-92%

of users found the products & services of their energy supplier useful

Heat pumps and sustainable heating systems

80-86%

of users found the products & services of their energy supplier useful



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

Awareness gap and affordability concerns are primary barriers that must be addressed

Awareness and affordability are the primary barriers for residential consumers to engage in energy transition

#1

Consumer do not actively take part in the energy transition, because many of them don't know how

3 out of 4 consumers (78%) are not yet actively taking part in the energy transition.

More than **one in two consumers are not aware** of their energy suppliers' offering of products and services for direct electrification and/or better control of the energy cost.

There is still an important awareness gap which must be addressed.

#2

Affordability remains a top concern, hindering energy consumers to adopt new clean energy solutions for households such as home energy generation or EVs.

When it comes to using energy at home, consumers report a lack of control — **11% feel less in control** of their energy costs than they did 12 months ago. Understanding the drivers behind this perception is essential to closing the gap.

When considering new electric solutions, upfront capital costs remain the primary obstacle. Between 24% and 40% of respondents cite cost as the top barrier to adopting electric solutions such as EVs, water storage heating, home energy generation, or storage.

When trying to take concrete action, many consumers stay within the limits of low-cost measures despite strong environmental awareness (8 in 10 consumers care about their impact on the environment).

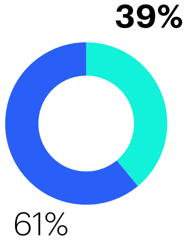
While 68% use energy-efficient lightbulbs, 55% have reduced their overall energy use, and 47% have purchased energy-efficient appliances, deeper engagement is often hindered by affordability concerns.

#1 Awareness is the missing link to widespread adoption

While most energy suppliers now offer a wider range of solutions, awareness remains low—fewer than 1 in 2 consumers are aware of what is available, and for some specific offers, it is as low as 1 in 10

There is a clear awareness gap...

Solutions to generate, store or electrify energy use

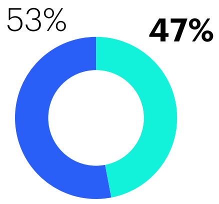


About 2 in 5 consumers are aware of their energy supplier's new offerings—meaning 6 out of 10 remain unaware.

...and even more so when looking at individual offers

Top 3 solutions offered by Energy Suppliers		Energy Suppliers' offering	Customer awareness
#1	**New products** to generate, store or electrify energy use	76%	14%
#2	**Expert advice** about new products	41%	13%
#3	**Installation and financing** of new products	39%	7%

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.

		Energy Suppliers' offering	Customer awareness
#1	**Advice and tips** about how to **reduce energy bill** based on my personal situation	90%	23%
#2	Offer me **products and services to reduce** my energy use and save costs	75%	19%
#3	Help me find the **right support** in case I am unable to pay my energy bill	44%	11%

Aware Unaware

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

#2 Rising energy costs have led to an increased number of consumers that 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…

11% +3pp

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

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

What is the main reason that you feel less able to control your energy costs?

32% +10pp 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)

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

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

	Home energy generation	Heating	Electric mobility	Energy Storage
#1	-5pp 28% Too expensive	+5pp 29% Too expensive	+4pp 40% Too expensive	24% Too expensive
#2	-5pp 28% Not allowed to do that	-11pp 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

Q: What is the main barrier holding you back ?

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

increase vs. 2021 decrease vs. 2021
(Change shown in percentage points)

#2 Consumers are on board with sustainability, just not at any cost

8 in 10 consumers care about their impact on the environment—but cost concerns and the feeling that "my actions don't matter" still hold many back from doing more.

European consumers show a widespread environmental awareness...

81%
Of consumers consistently express concern about their impact on the planet

- **25%** **actively try to limit and reduce the impacts** of their activities on the environment
- **56%** **try** to avoid doing things that damage the environment **if it doesn't cause inconvenience**

...but their actions tend to focus on simple, cost-effective measures - mainly behavioral changes or energy efficiency solutions – with limited impact.

68%
Use LED lightbulbs in the home

55%
Have reduced their energy consumption

47%
Have bought energy efficient appliances

A subset of consumers maintains limited interest in further reducing their environmental impact...

19%
Of consumers express little to no concern about their impact on the planet

- **14%** think about the impact of their activities on the environment at times, but **don't let that limit them** in what they do
- **5%** **have no/very limited interest** in the impacts of their activities on the environment

Many of those who don't act say it is because of cost, lack of support, or not knowing what to do.

51%
Cite financial constraints

30%
Say it is not a priority

26%
Consider their effort not to be sufficient to contribute to the energy transition

Consumer survey: n=2,439 (All respondents). Sample size varies for follow-up questions, top reasons for limited interest in environmental impact : n=464

Consumers look to all actors in the new energy ecosystem to help them in their personal energy transition journey

Through solutions such as flexible energy contracts, smart tools to better manage energy usage and tailored engagement strategies, more consumers will be able to actively take part in the energy transition

There are 3 main calls for engagement to the wider energy ecosystem to address key barriers for residential consumers' participation in energy transition

Energy system & regulation ecosystem

Aggregators

Energy Suppliers

Energy services companies

New energy solution ecosystem

Consumer organisations

Governments & local authorities

TSOs & DSOs

Regulators

Technology manufacturers

Automotive companies

Installers

Financial institutions

#1 Flexible contracts offer a clear path for consumers to lower energy costs and gain greater control

With the abundance of clean and affordable electricity, flexible energy contracts are a key opportunity to further support consumers in managing energy costs.

2 in 3 consumers expressed interest in switching to a flexible contract.

#2 Smart energy tech can be an effective way to further support consumers in managing energy costs

Smart apps, thermostats, and connected devices are effective tools to help consumers better manage their energy costs.

While nearly 1 in 3 consumers have adopted such technologies, broader engagement remains a challenge.

With only 21% identifying as tech-savvy, expanding adoption will require building trust and simplifying the user experience for the 40% who are cautious and the 34% who are resistant to new technologies.

#3 Effective engagement with a targeted approach can bring everyone on board

Engaging consumers in complex offerings like flexible contracts or new electric solutions requires a nuanced approach.

It is essential to account for generational differences, varying levels of digital literacy, environmental attitudes, and vulnerability to energy poverty.

Tailoring communication, support, and incentives to these diverse needs will be key to ensuring inclusive adoption and maximising impact across all consumer segments.

Energy Consumer

#1 Flexible contracts offer a clear path for residential consumers to lower energy costs and gain greater control

Consumers are interested in switching to some sort of flexible contract:

2 in 3 energy consumers are interested in switching to some sort of flexible contract to reduce energy bills

Time of Use offers are most popular, overall, as a way to reduce electricity bills. Critical peak pricing is much less appealing:

- **29%** An offer with generally lower/higher prices and occasionally higher/lower prices
- **27%** A time of use offer
- **16%** An offer based on spot prices
- **15%** A critical peak pricing

Q: In order to reduce your electricity bill, which of the following, if any, would you be ready to switch to? Please select all that apply.

2x For majority of those interested in peak pricing, the peak price would need to be up to twice as high as the off-peak price to encourage energy saving behaviors (57% of respondents who are interested in peak pricing)

Abundance of clean energy & rising number of hours with negative prices offer great potential for demand-side flexibility

2x Hours with negative electricity prices

The number of hours when at least one EU27 country had a negative price doubled in 2024 and reached 18% of total hours, compared to 9% in 2023. [2]

Most negative price hours occur at times of peak solar power generation

This underscores the need for system flexibility and electrification and well-designed support schemes amidst increasing renewable energy integration.

Consumer survey: n=2,439 (All respondents). For consumers interested in peak princing: n= 906

[2] Source: Eurelectric. (2024). Power Barometer 2024 – Tracking Europe's progress on electrification

#2 Smart energy technologies offer strong potential to help consumers manage costs, yet adoption is limited by lack of interest, awareness, and perceived relevance

Adoption of smart energy tools:

Today, more than 1 in 3 consumers use smart thermostats, apps, or connected devices to monitor and reduce their energy bills—showing clear early traction.

Smart app linked to the consumer's consumption

- **19%** provided by their energy supplier
- **10%** provided by a company that is not their energy supplier

Smart thermostat for HVAC control

- **11%** Smart thermostat (e.g., Hive, Ecobee, Wyze)

Barriers to wider adoption:

The main reasons consumers hesitate are lack of interest, limited awareness of the benefits, and competing priorities—highlighting a need for clearer value communication.

Smart meter rollout as an enabler:

With smart meters now installed in a growing number of homes, they provide the critical foundation for unlocking benefits like flexible energy contracts and real-time consumption insights.

Smart meter

- **26%** Use it to manage energy use
- **17%** Use it, but not to manage energy use

Consumer survey: n=2,439 (All respondents), For device adoption barriers : n= 1,549

#3 A targeted engagement approach to bring everyone on board

We have identified different consumer groups having different motivations, needs and concerns, requiring tailored communication, support, and incentives to drive meaningful engagement in the energy transition.

Engaged

This segment includes young and established adults who are **willing and motivated** to engage with the energy transition. They often use smart meters, dynamic contracts, or energy management systems, and some are active prosumers. While eager to act, some might need financial support, making clear incentives or support crucial to converting interest into action.

Undecided

Mostly established adults who prioritise **practicality and reliability** in their decision-making. While they are environmentally aware, they tend to **question the personal impact of their actions** and are **cautious about adopting new technologies**. With busy lives and competing priorities, they are most responsive to solutions that are convenient, time-saving, and already proven in the market.

Disengaged

Unaware of or indifferent to available energy transition options. Often resistant to change and skeptical about environmental impact or new technologies, they may have the financial means but lack the understanding or motivation to act. Clear communication, trust-building, and reassurance are essential to move them toward engagement.

Constrained

Unable or struggling to participate in the energy transition due to limiting personal or external factors, such as financial hardship, unstable housing, or low digital literacy. Often vulnerable or energy-poor, they face structural barriers that prevent independent decision-making and require targeted support to be included.

Environmental concern

25% Eco-Warriors

Highly concerned and actively trying to minimise environmental impact.

56% Convenience seekers

Concerned and trying to minimise environmental impact when convenient.

5% Environmental skeptics

Express no or very limited interest in the impact of their actions on the environment

Constraints

31% Change-resisters

These consumers see the value in new energy solutions—like solar, EVs, or smart devices—but cannot afford the upfront costs.

Attitude towards technology

21% Tech-Savvy

Proactively on the lookout for new technology devices, as soon as they enter the market.

40% Cautious tech adopters

Cautious about new technologies and purchasing only once they've been on the market for a while and have proven their value.

34% Change-resisters

Delay adoption of new technologies until absolutely necessary. Often distrustful or overwhelmed by new products.

22% Infrastructure-limited

This group faces structural barriers beyond their control: they may be renters, live in shared buildings, or simply not have the authority or technical capacity to install new solutions.

Power2People: 5 commitments from energy suppliers to support residential customers in the energy transition

Building on the insights of over 2,000 consumers, 70+ energy suppliers, and 60+ ecosystem stakeholders across Europe, five key commitments have been defined by energy suppliers to help residential customers actively participate in the energy transition.

These commitments reflect the ambition of energy suppliers to remove barriers, offer inclusive solutions, and empower every consumer to play their part in Europe's clean energy future.

Each of the five commitments is grounded in the insights gathered through the consumer and supplier surveys. For each commitment, the Eurelectric document outlines:

- Concrete actions and options that suppliers and stakeholders can take to deliver on the commitment,
- Policy recommendations to support implementation, and
- Real-world examples from energy suppliers to inspire and mobilise further action.

Read the report here

01 Communication for Consumer Empowerment

Energy suppliers commit to improving targeted communication to different customer groups, using digital tools and channels to create more opportunities and support for consumers to engage in the energy transition.

02 Engagement & Inclusion for All Consumers

Energy suppliers commit to raising consumer awareness about the long-term financial and energy savings from electrification solutions such as heat pumps, EVs, and rooftop solar, integrated with tailored products and services. They also support initiatives that assist vulnerable or constrained consumers, particularly where national social policies may fall short.

03 Energy Efficiency Measures

Energy suppliers commit to delivering clear guidance on the benefits of energy efficiency and behavioral changes that result in savings. This includes offering products, services, and smart applications that help customers monitor, compare, and optimise their energy use.

04 Products & Services

Energy suppliers commit to leveraging innovation and digital technologies to design simpler, more automated solutions that promote electrification and give consumers greater control over their electricity use.

05 Demand Flexibility

There is a shared ambition to enable behavioral shifts toward more flexible electricity consumption. Energy suppliers will promote and support flexible use opportunities, while taking consumer protection into account, recognizing the potential for financial savings and broader system benefits.

Methodology

Between 24 May and 5 June 2024, we asked thousands of consumers across 12 European countries whether they have seen a change in their level of choice, control and experience in meeting their energy needs. In parallel, we gathered input from energy suppliers across Europe about their activities and plans for empowering their customers in the energy transition in times of energy crisis.

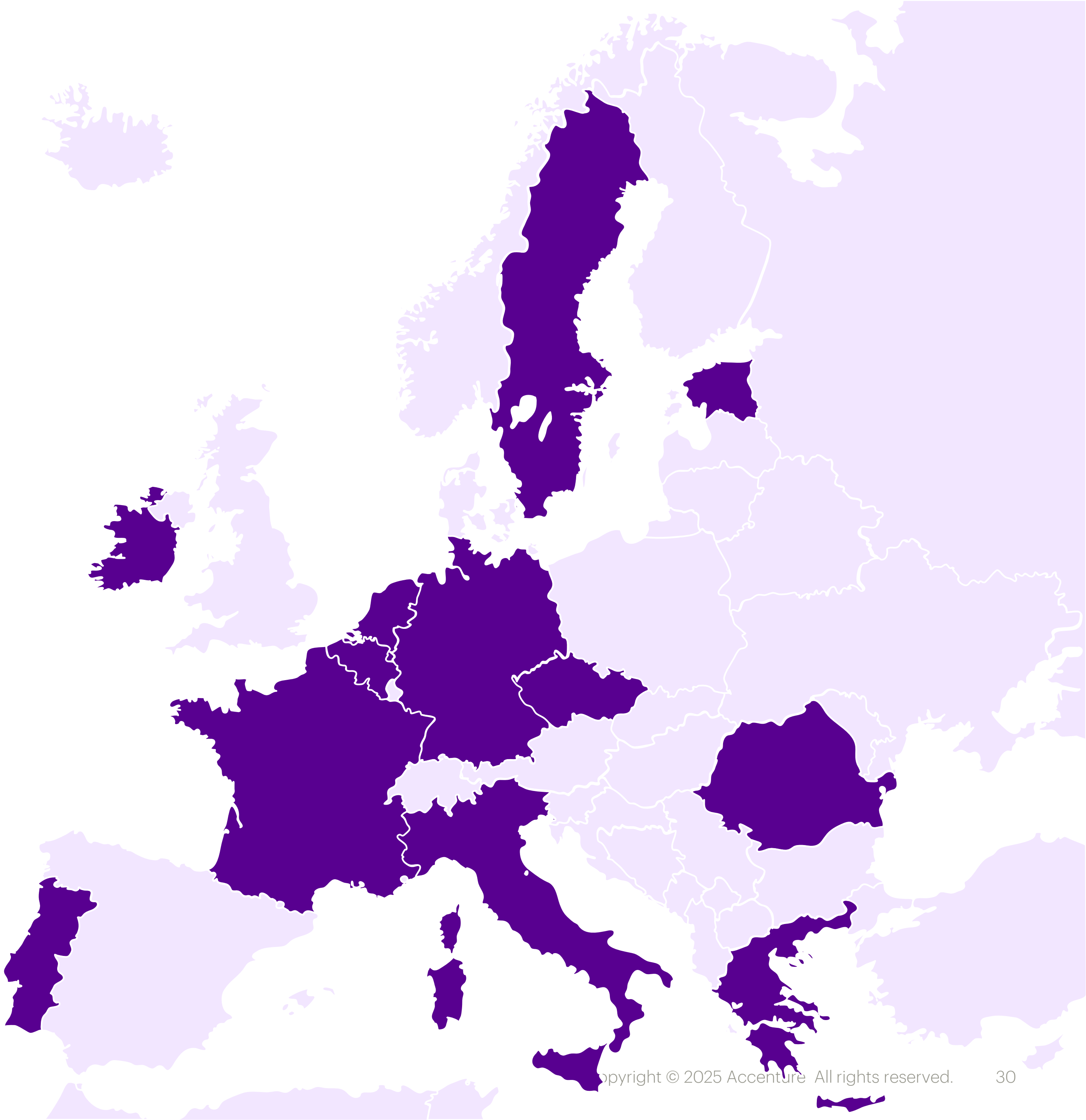
Consumer survey

- Eurelectric and Accenture commissioned YouGov to conduct a general population survey in **12** European countries.
- All samples are broadly nationally representative of adults aged 18+ who are either solely or jointly responsible for dealing with energy suppliers in each country.
- In total, **2,439** respondents were interviewed online:

  Country-level sample sizes: Belgium (204), Czechia (201), Estonia (202), France (200), Romania (200), Greece (202), Czechia (201), Italy (200), Netherlands (200), Portugal (208), Romania (200) and Sweden (200).

Company survey and interviews

- In total, 66 energy suppliers from various EU countries responded to an online survey and shared insights on actions taken since 2024 to support their residential customers with their energy use and persisting challenges.



Contributors

Tim Vogt
Advisor, Retail Markets
Eurelectric

Sanda Tuzlic
Managing Director, Energy Transition Services
Accenture

Pauline Steinbach
Advisor, Energy Transition Services
Accenture

Saad Tazi
Research Specialist
Accenture

About Accenture

Accenture is a leading global professional services company that helps the world's leading businesses, governments and other organizations build their digital core, optimize their operations, accelerate revenue growth and enhance citizen services—creating tangible value at speed and scale. We are a talent- and innovation-led company with approximately 801,000 people serving clients in more than 120 countries. Technology is at the core of change today, and we are one of the world's leaders in helping drive that change, with strong ecosystem relationships. We combine our strength in technology and leadership in cloud, data and AI with unmatched industry experience, functional expertise and global delivery capability. Our broad range of services, solutions and assets across Strategy & Consulting, Technology, Operations, Industry X and Song, together with our culture of shared success and commitment to creating 360° value, enable us to help our clients reinvent and build trusted, lasting relationships. We measure our success by the 360° value we create for our clients, each other, our shareholders, partners and communities. Visit us at www.accenture.com.

About Accenture Research

Accenture Research creates thought leadership about the most pressing business issues organizations face. Combining innovative research techniques, such as data-science-led analysis, with a deep understanding of industry and technology, our team of 300+ researchers in 20 countries publish hundreds of reports, articles and points of view every year. Our thought-provoking research developed with world-leading organizations helps our clients embrace change, create value and deliver on the power of technology and human ingenuity. Visit us at accenture.com/research.

About Eurelectric

Eurelectric is the federation for the European electricity industry. We represent the power sector in over 32 European countries, speaking for more than 3,500 companies in power generation, distribution and supply. We contribute to the competitiveness of our industry, provide effective representation in public affairs and promote the role of electricity in addressing the challenges of sustainable development. We draw on more than 1000 industry experts to ensure that our policy positions and opinions reflect the most recent developments in the sector. This structure of expertise ensures that Eurelectric's publications are based on high-quality input with up-to-date information. We currently have over 34 full members, representing the electricity industry in 32 European countries. Visit us at www.eurelectric.org

Disclaimer

The material in this document reflects information available at the point in time at which this document was prepared as indicated by the date provided on the front page, however the global situation is rapidly evolving and the position may change. This content is provided for general information purposes only, does not take into account the reader's specific circumstances and is not intended to be used in place of consultation with professional advisors. Accenture disclaims, to the fullest extent permitted by applicable law, any and all liability for the accuracy and completeness of the information in this document and for any acts or omissions made based on such information. Accenture does not provide legal, regulatory, audit or tax advice. Readers are responsible for obtaining such advice from their own legal counsel or other licensed professionals. This document refers to marks owned by third parties. All such third-party marks are the property of their respective owners. No sponsorship, endorsement or approval of this content by the owners of such marks is intended, expressed or implied.