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# Queensland Household Energy Survey 2025

# Foreword

Our commitment is to lead the energy transition towards an affordable, reliable and sustainable future, ensuring that we continue to meet the needs of Queenslanders.

The Queensland Household Energy Survey (QHES) is one tool in the kit that informs how we continue delivering a cost-effective, reliable and safe power system for the future.

Customer choices at home guide our electricity transmission and distribution network development plans.

Understanding how Queenslanders are modifying their energy consumption patterns and integrating new technologies is essential for developing future electricity networks.

The insights shared with us through the QHES help map that future.

We appreciate the trust instilled in us to deliver for our customers. – We exist to serve the more than five million people who call Queensland home.

We are pleased to present the high-level results of this year's Queensland Household Energy Survey.

**Paul Simshauser**

Chief Executive, Powerlink Queensland

**Peter Scott**

Chief Executive Officer, Energy Queensland
(incorporating Energex and Ergon Energy Network)

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# Our Brands

**Ergon Energy Network** and **Energex** are Energy Queensland's poles and wires distribution businesses and deliver electricity across Queensland.

Through our 210,000 kilometres of electricity networks and 33 stand-alone microgrids, we energise the lives of more than five million Queenslanders, supplying electricity directly to 2.35 million residential and business customers, 850,000-plus with rooftop solar, from the Tweed River to Torres Strait and from Brisbane to Birdsville.

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**Powerlink Queensland** is a Government-Owned Corporation that owns, develops, operates and maintains the transmission network in Queensland.

We connect Queenslanders to a world-class energy future, providing electricity to five million Queenslanders and 238,000 businesses via the state's distribution networks. We are also responsible for connecting large-scale renewable energy developments, including wind and solar, and providing electricity to large industrial customers in the rail, mining and LNG sectors.

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# About the Queensland Household Energy Survey 2025

**4105 participants completed in 2025**
3570 from research panel
535 from online communities
(External website, Facebook, media release etc)

**Online survey was active between March 24 and April 22, 2025**

**20-min online survey**
Topics including sentiment, managing bills, energy usage, and appliance ownership

**66% own, or are paying a mortgage**
**74% live in detached house**


Results in this report are most often presented as a total Queensland result because the results are mostly similar for Regional Qld and South-East Qld. While the survey aims to be representative of Queensland households, there is a higher incidence of participants who own solar PV, electric vehicles (EVs) and battery storage compared to other sources.

More detailed location information can be found on the website.

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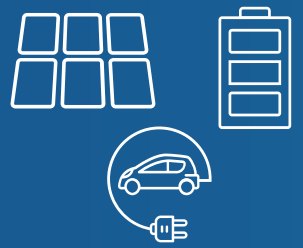
# Index

# 1 Executive Summary

Households' trust in the reliability of their electricity service has strengthened despite a period during which many were affected by power outages.

Increasing electricity bills are becoming more of a concern for households from a cost-of-living perspective, when compared to other expenses. Households are exploring different tariff plans to better manage their bills.



Interest and uptake of energy technologies and solutions has softened as households postpone making significant purchases.

# 2

# Statewide Results

# Electricity Sentiment

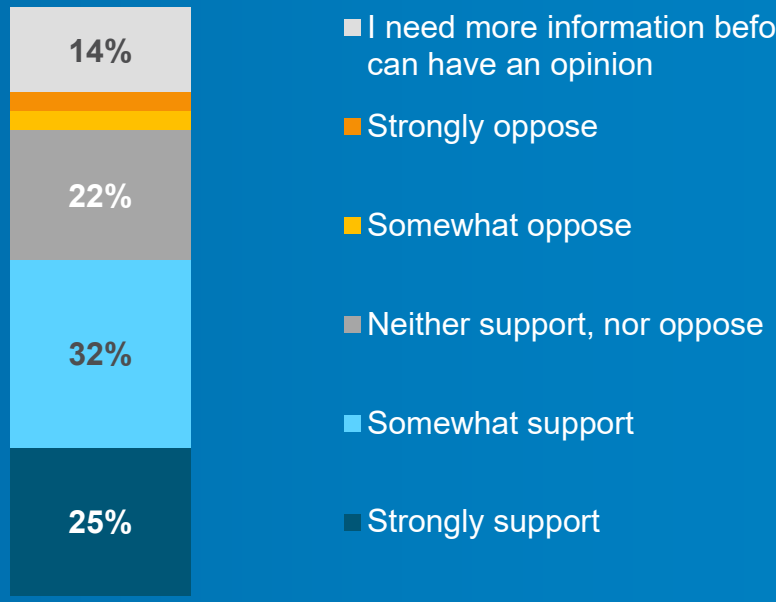
## Households have more positive sentiment around trust and reliability towards their provider* this year

| | 2024 | Agreement (Rated 7-10 out of 10) | 2025 |
|---|---|---|---|
| **Affordability:** These energy suppliers are working to make electricity more affordable | 38% | → | 36% |
| **Trust:** If faced with a problem, I would trust these energy suppliers to do the right thing | 59% | → | 62%▲ |
| **Reliability:** These energy suppliers provide my household with a reliable energy supply | 71% | → | 76%▲ |
| **Security:** These energy suppliers give me a sense of security about my electricity supply | 59% | → | 61% |

*Provider is Powerlink and either Ergon Energy Network or Energex

## While there is majority support for network investment, many are undecided, or want more information about the energy transition

Support for investment in network (%)

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▲▼ Significantly higher/lower than previous year at the 95% confidence level

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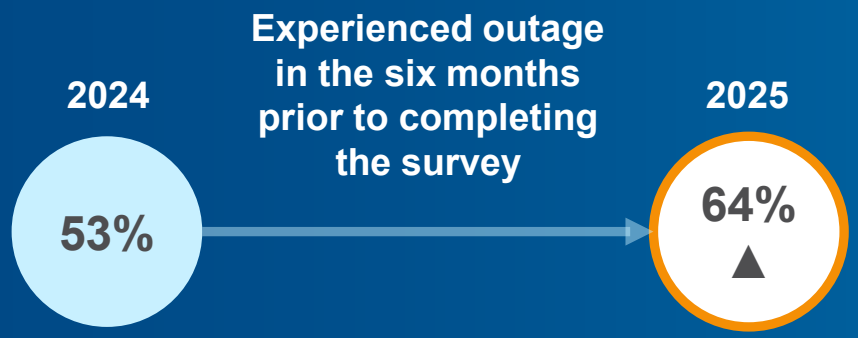
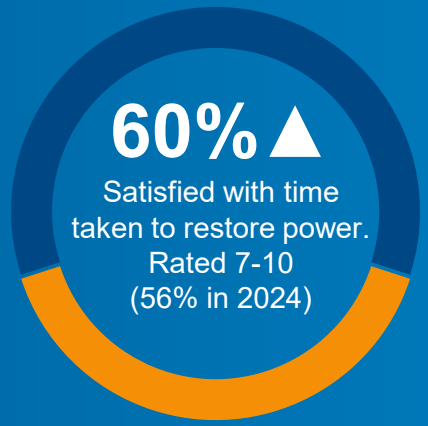
# Electricity Outages

**As a result of unprecedented weather events, almost two-thirds of households have been affected by power outages**

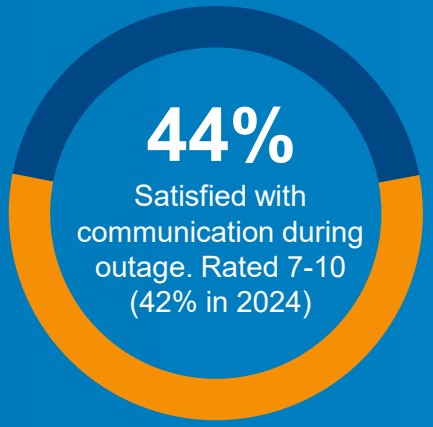



**Despite the higher incidence of outages, there has been increased satisfaction with the performance of Ergon Energy Network and Energex during outages**

## TIME TAKEN TO RESOLVE OUTAGE




## COMMUNICATION DURING OUTAGE




**During 2025, households across Queensland experienced impacts of extreme weather and natural disasters.**

In March, one of the most significant weather events in recent Australian history, Cyclone Alfred, impacted South-East Queensland. Fieldwork for 2025 QHES was delayed to avoid data collection among impacted communities immediately following the cyclone.

Other areas of Northern and Western Queensland experienced heavy rain, storms and flooding between January and April 2025.

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▲▼ Significantly higher/lower than previous year at the 95% confidence level

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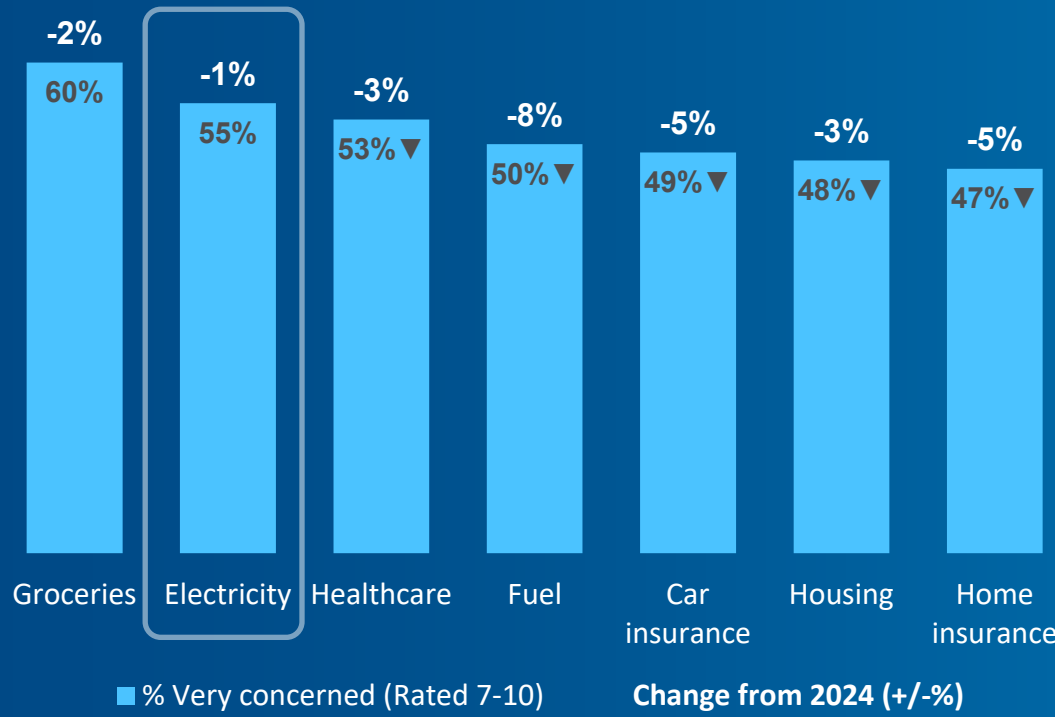
# Managing Household Bills

## Electricity bills remain a concern for households and are now the second most concerning bill, while concern with other household bills have declined

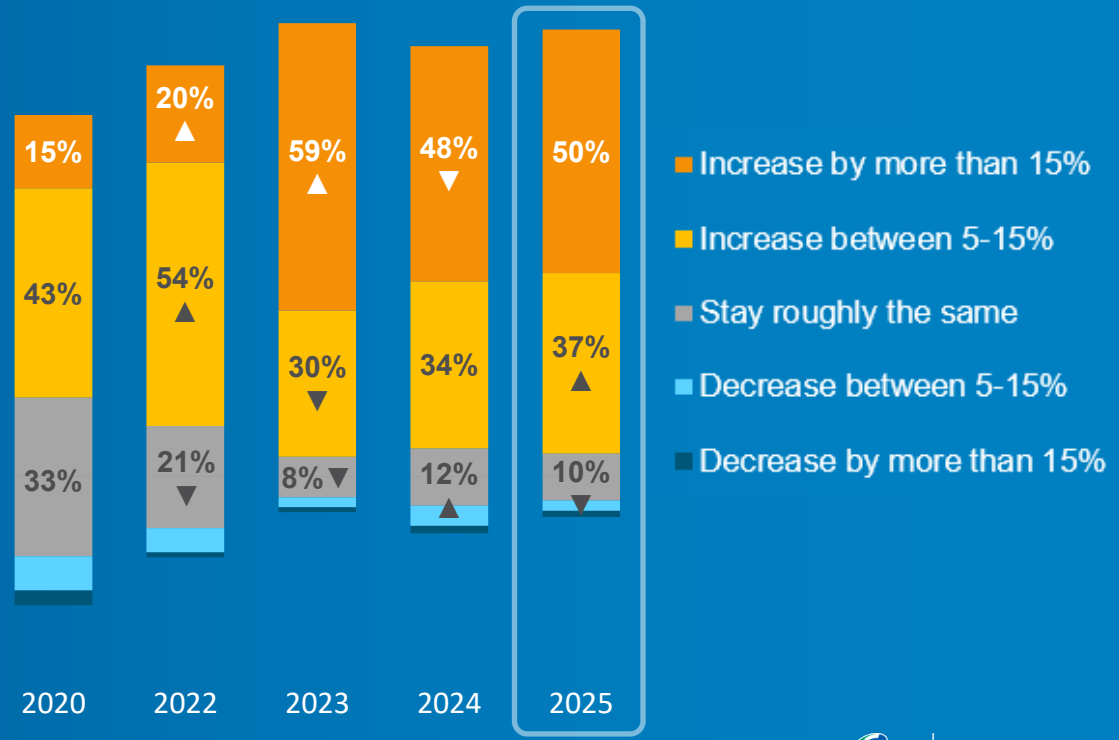
Concern about ongoing ability to pay expenses
(% High concern 7-10)




▲▼ Significantly higher/lower than previous year at the 95% confidence level

## For the third year running, most households are expecting significant price increases in the future

Over the next three years, do you expect the price you pay for electricity to…

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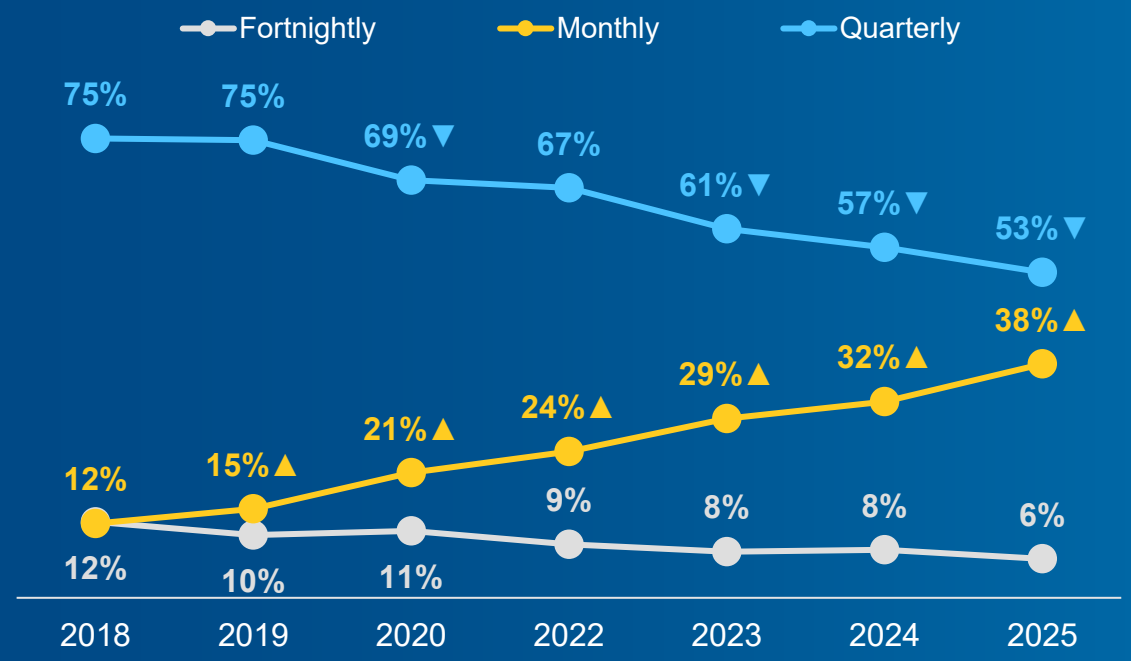
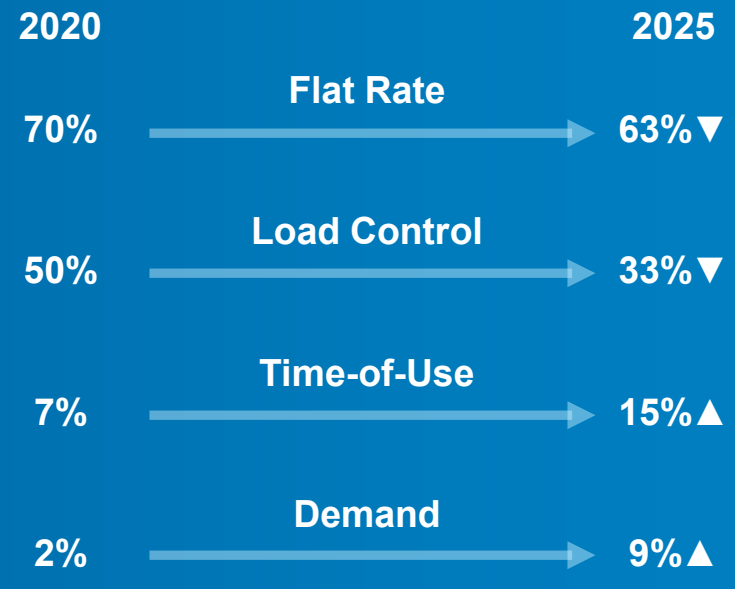
# Managing Household Bills

## Adoption of monthly billing continues to grow, likely due to the rollout of smart meters

Electricity billing frequency (%)




## Similarly, the rollout of smart meters is seeing a continued increase in the mix of electricity tariffs accessed by customers.

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▲▼ Significantly higher/lower than previous year at the 95% confidence level

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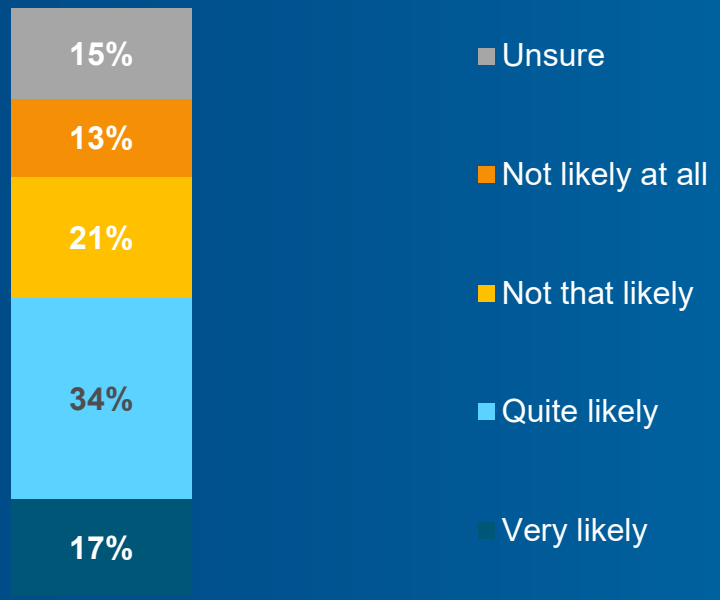
# Household Energy Usage

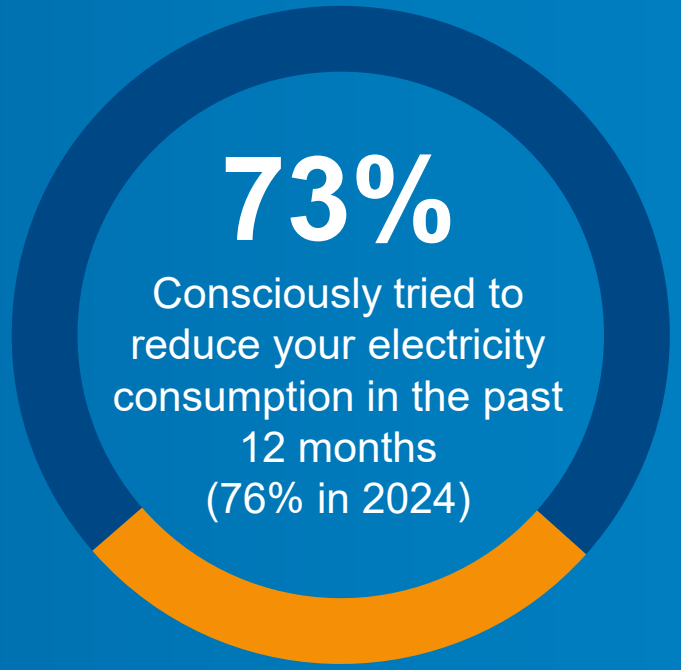
## Half of households* would consider moving to a daytime usage tariff if it offered significantly lower costs

* Among participants not currently on a Time of Use tariff

Interest in daytime usage tariff (%)




## This year, there were fewer households actively trying to reduce their usage

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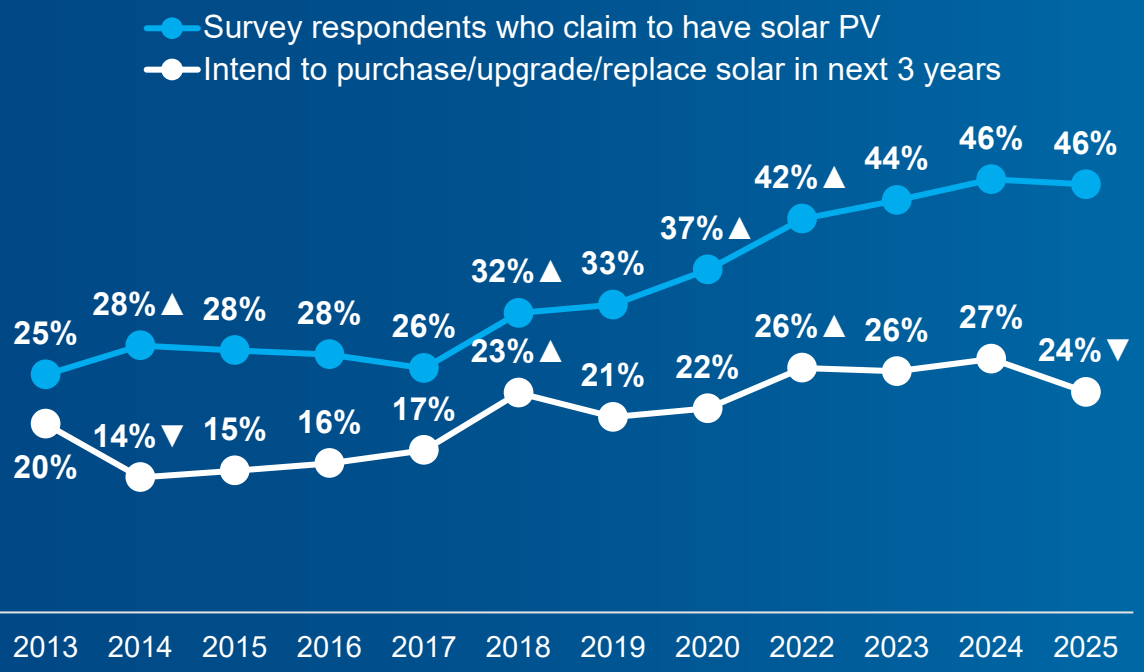
# Solar

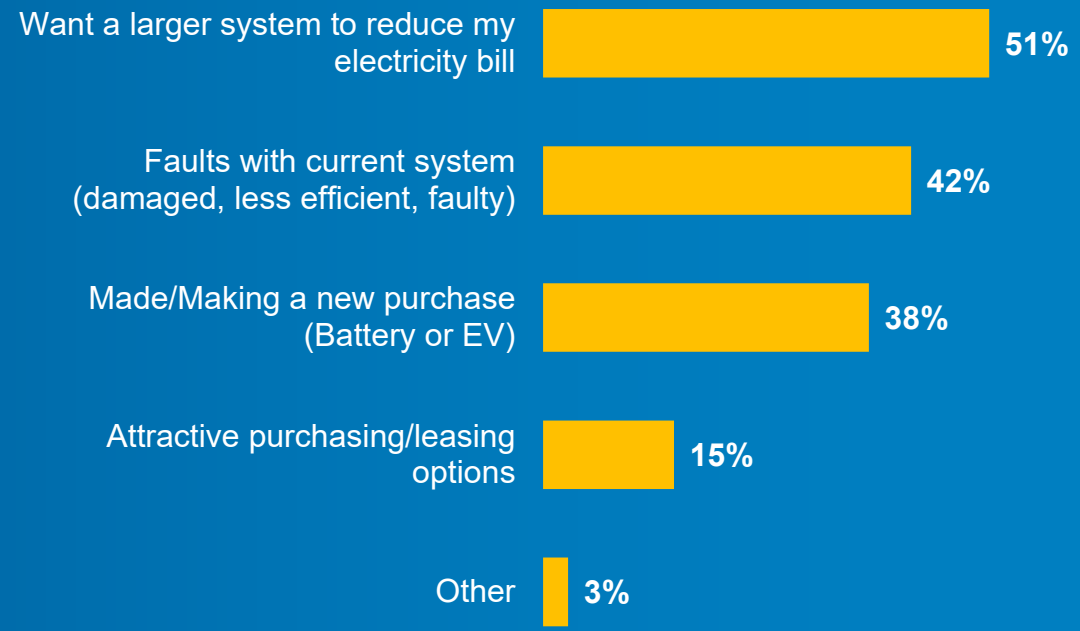
## Solar PV ownership has remained consistent, but intention to purchase or upgrade solar PV has decreased in 2025

Solar PV ownership and intent to purchase (%)*




## Reducing electricity costs continues to be the main motivation behind solar PV system upgrades and replacements

Reasons to upgrade/replace solar PV system (%)

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▲▼ Significantly higher/lower than previous year at the 95% confidence level. * Changes to ownership is based off previous QHES survey data, therefore is not necessarily an indication of actual incidence in the state. This absolute figure may differ to other sources.

Find the full results for this section of the QHES here

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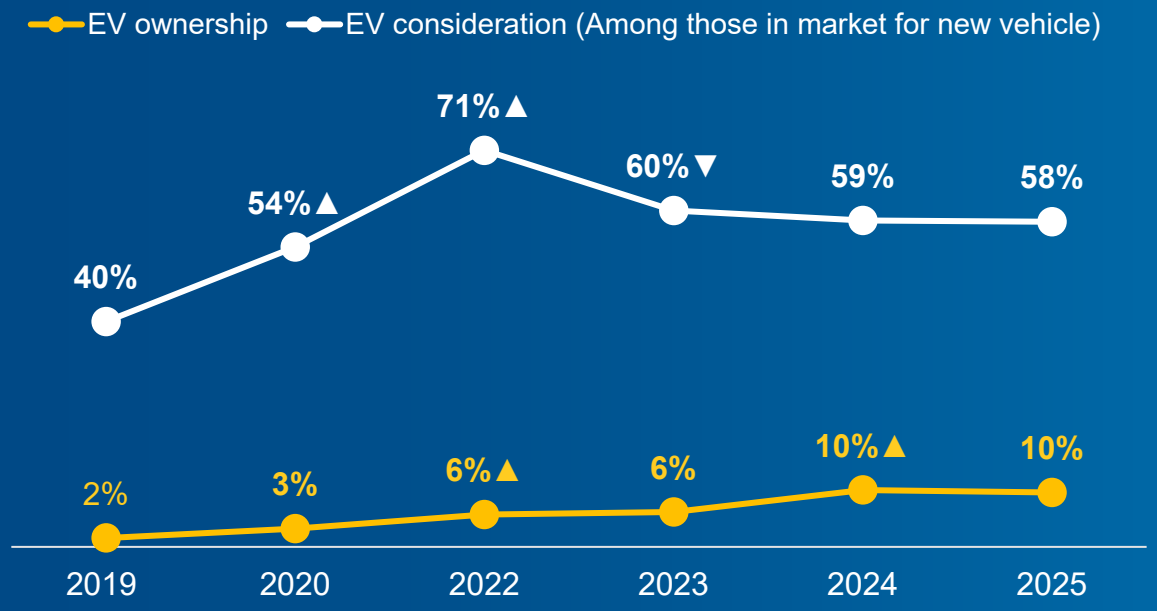
# Electric Vehicles & Battery Storage

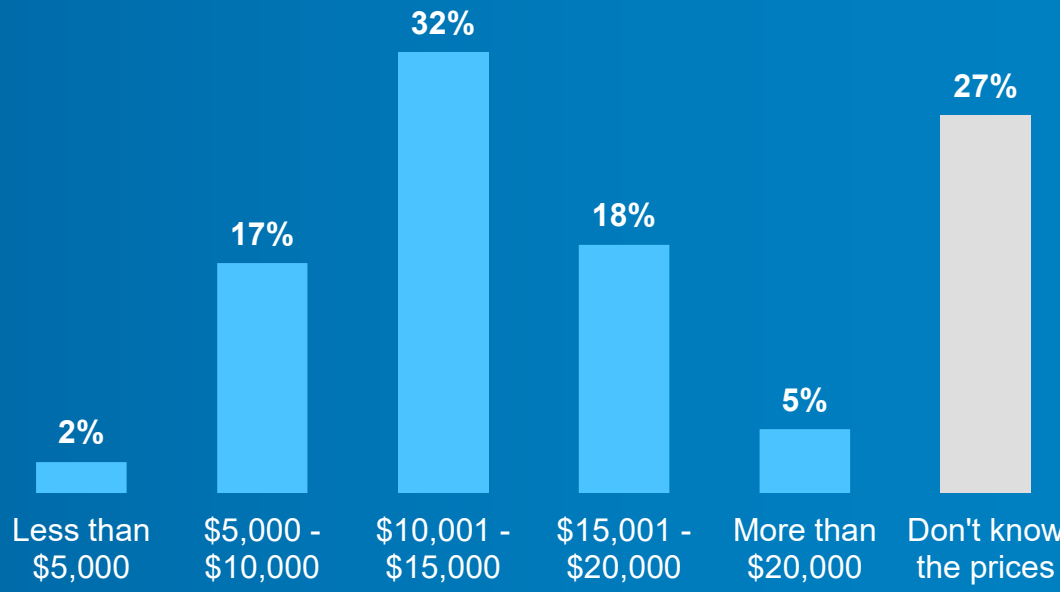
## Electric vehicle (EV) ownership and consideration is consistent with last year

### EV ownership and consideration (% in next 3 years)*




## With more than a quarter of respondents unaware of battery prices, a strong opportunity exists to educate the market and support household purchase decision making

### Expected household battery costs (%)

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▲▼ Significantly higher/lower than previous year at the 95% confidence level. * Changes to ownership is based off previous QHES survey data, therefore is not necessarily an indication of actual incidence in the state. This absolute figure may differ to other sources.

Find the full results for Electric Vehicles here and the Battery Storage here

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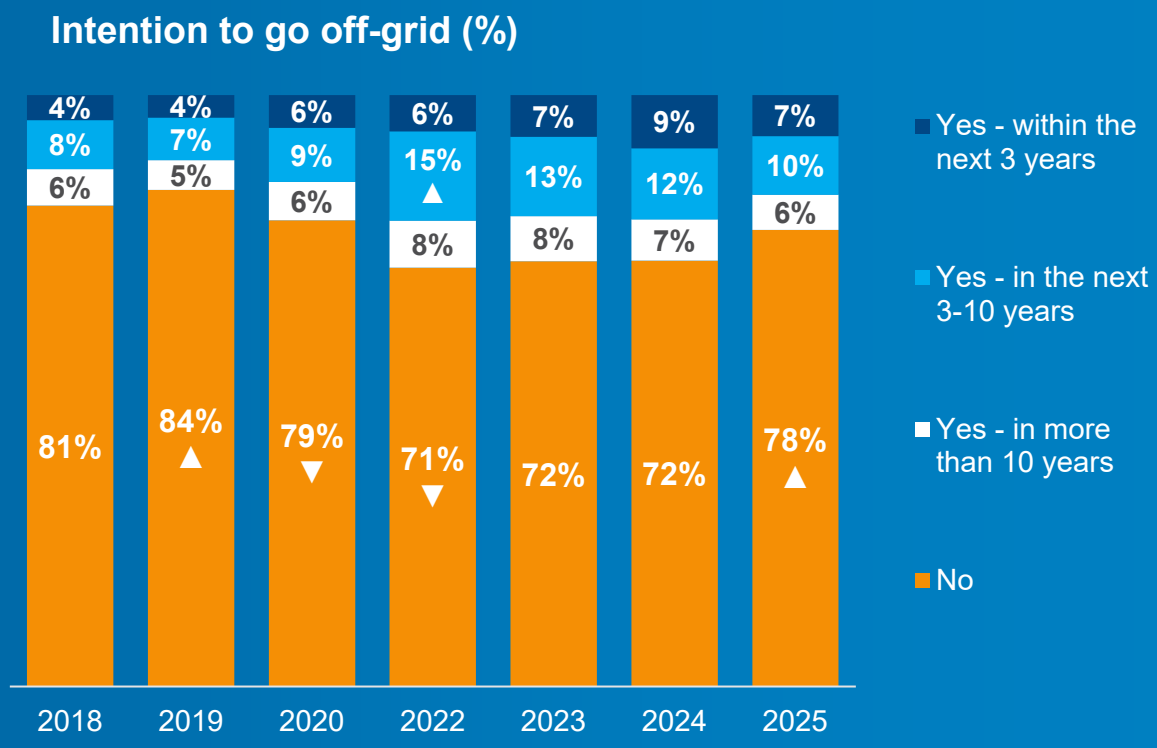
# Energy Management & Going Off-Grid

## This year, households are less interested in third-party management, automatic management and remote control of appliances

| | 2024 | High interest (Rated 7-10 out of 10) | 2025 |
|---|---|---|---|
| Remote control: Electricity | 52% | → | 50% |
| Remote control: Other appliances | 49% | → | 46%▼ |
| Automatic management | 49% | → | 46%▼ |
| Third-party management | 35% | → | 28%▼ |

## Households are less interested in exploring options to go off-grid

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▲▼ Significantly higher/lower than previous year at the 95% confidence level

Find the full results for Energy Management here and Going off-Grid here

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# 3

# Household Profile Snapshots

# **Household profiles:** Summary view

## Eight household profiles were identified and categorised.

Understanding how and why these participants currently use and think about energy, and what could change in the future, will assist Queensland electricity providers to deliver better solutions and customer service. See Section 4 for a full description of each.





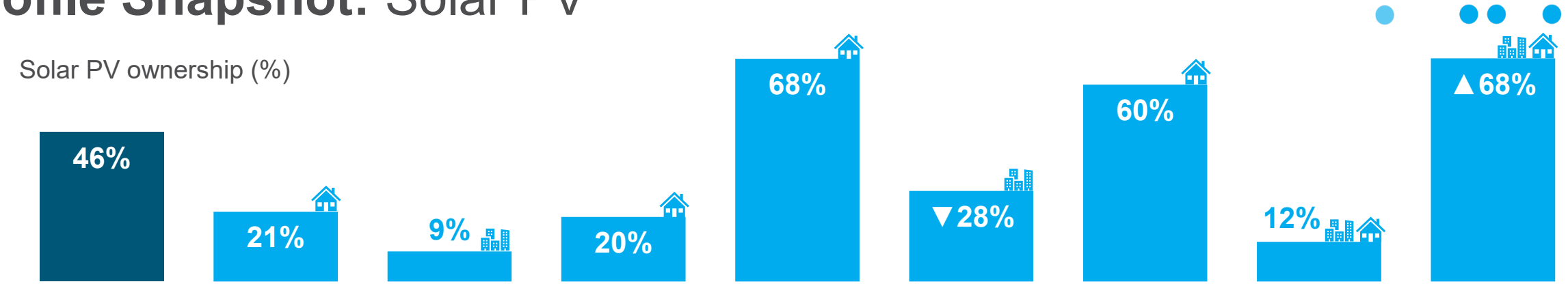



| | Renters in houses | Renters in apartments or townhouses | Family renters in houses | Family homeowners in houses | Homeowners in apartments or townhouses | Homeowners in houses | Retiree renters | Retiree homeowners |
|---|---|---|---|---|---|---|---|---|
| **% 2025 QHES participants by household type** | 7% | 9% | 9% | 23% | 8% | 16% | 5% | 16% |
| **Age*** | Younger | Younger | Young to middle-aged | Middle-aged | Middle-aged | Older | Older | Older |
| **Household*** | Couples without children, or in share houses | Live alone, couples, or in share house | Parents and single parents | Couples and singles with dependent children | Live alone, and couples with children | Couples without children | Couples and singles without children | Couples and singles without children |
| **Location*** | South-East Qld | South-East Qld: Brisbane / Gold Coast | Regional Qld | Regional Qld | South-East Qld: Brisbane / Gold Coast | Regional Qld | South-East Qld | Regional: Sunshine Coast / Wide bay |
| **Household Income*** | Mid | Low / Mid | Low | Highest | Mid / High | High | Lowest | 2nd Lowest |



*Characteristics are representative of the profile, either the majority of participants, or features where this profile is over-represented. Some demographics included in this profile may be outside these aspects. Proportions are based on results from 2025 QHES survey, not ABS populations. These are the most common profiles identified from the QHES survey and do not cover the entire survey sample.

# **Profile Snapshot:** Solar PV



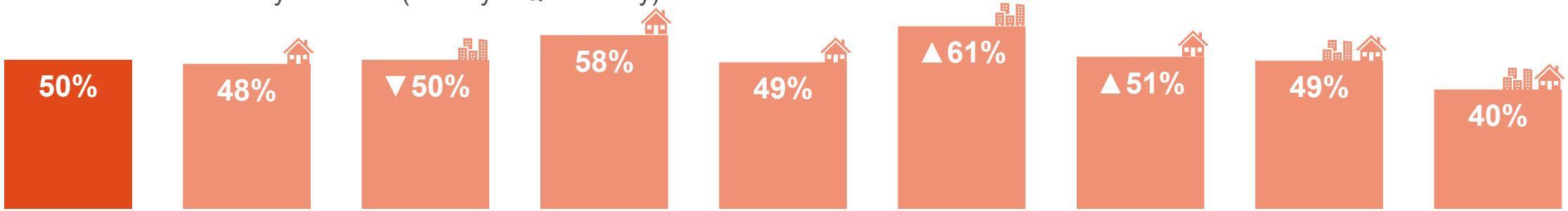

| All households | Renters in houses | Renters in apartments or townhouses | Family renters in houses | Family homeowners in houses | Homeowners in apartments or townhouses | Homeowners in houses | Retiree renters | Retiree homeowners |
|---|---|---|---|---|---|---|---|---|
| Year panels installed – Results of significance (Base: Those with solar PV panels) | 24% UNSURE | - | ▲38% UNSURE | 31% MID-TERM (2020-22) | ▲63% RECENT (2023-25) | 39% LEGACY (PRIOR TO 2019) | - | 54% LEGACY (PRIOR TO 2019) |
| Importance of maximising use of solar-generated electricity (Rated High Importance 7-10 out of 10) | 71% | - | ▼66% | 77% | 86% | 76% | - | 81% |
| Receive $0.44 feed-In tariff Queensland Solar Bonus Scheme | 2% | - | ▲11% | 9% | ▼3% | 15% | - | 25% |
| Reason for NOT having solar PV (Base: Those without solar PV panels) | 78% CURRENTLY RENTING | 64% CURRENTLY RENTING | 78% CURRENTLY RENTING | 25% SAVINGS DON'T JUSTIFY COST | 46% LIVE IN AN APARTMENT | 23% SAVINGS DON'T JUSTIFY COST | 80% CURRENTLY RENTING | 28% SAVINGS DON'T JUSTIFY COST |



▲▼ indicate statistically significant increases and decreases at the 95% confidence level in results in comparison to the previous year.
*Cells containing '-' do not show any results due to small sample sizes (n<50).

# **Profile Snapshot:** Electricity usage and behaviour

Likelihood to shift to a daytime tariff (% Very + Quite likely)



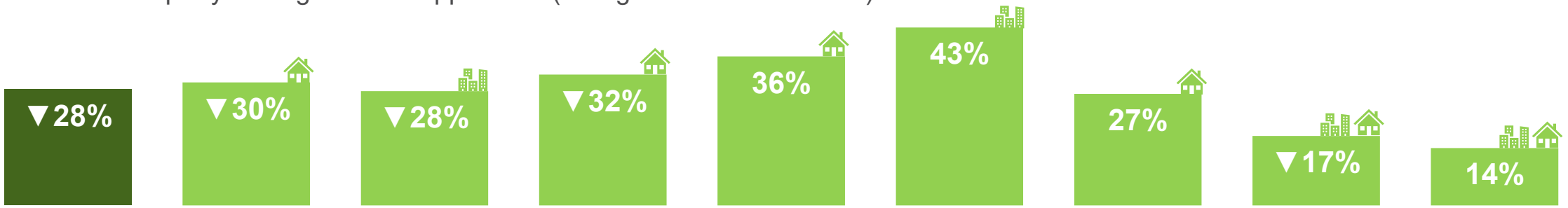

| All households | Renters in houses | Renters in apartments or townhouses | Family renters in houses | Family homeowners in houses | Homeowners in apartments or townhouses | Homeowners in houses | Retiree renters | Retiree homeowners |
|---|---|---|---|---|---|---|---|---|
| Try to reduce usage | 77% | ▼68% | 80% | 74% | 71% | 74% | 74% | 69% |
| Main reason to not switch to a daytime tariff (Base: Those not likely to switch) | DIFFICULTY SHIFTING ELECTRICITY USE AWAY FROM PEAK HOURS | DIFFICULTY SHIFTING ELECTRICITY USE AWAY FROM PEAK HOURS | DIFFICULTY SHIFTING ELECTRICITY USE AWAY FROM PEAK HOURS | DIFFICULTY SHIFTING ELECTRICITY USE AWAY FROM PEAK HOURS | DIFFICULTY SHIFTING ELECTRICITY USE AWAY FROM PEAK HOURS | DIFFICULTY SHIFTING ELECTRICITY USE AWAY FROM PEAK HOURS | DON'T LIKE TO BE CONSTRAINED ABOUT TIME OF USAGE | DON'T LIKE TO BE CONSTRAINED ABOUT TIME OF USAGE |
| Engagement in bills – Cost (% Almost always check) | 57% | 53% | 54% | 56% | 58% | 61% | 63% | 64% |
| Engagement in bills – Usage (% Almost always check) | 48% | 39% | 39% | 48% | 46% | 54% | 52% | 58% |
| Awareness of current tariff | 25% | 22% | ▼24% | 42% | 39% | 43% | 27% | 38% |
| Likelihood to purchase a Home Energy Management System (HEMS) (% Very + Somewhat likely) | 35% | 35% | ▼37% | 44% | 47% | 33% | ▼14% | 16% |



▲▼ indicate statistically significant increases and decreases at the 95% confidence level in results in comparison to the previous year.

# **Profile Snapshot:** Third-party control and remote access

Interest in third-party management of appliances (% High interest rated 7-10)




| All households | Renters in houses | Renters in apartments or townhouses | Family renters in houses | Family homeowners in houses | Homeowners in apartments or townhouses | Homeowners in houses | Retiree renters | Retiree homeowners |
|---|---|---|---|---|---|---|---|---|
| Trust in electricity companies (% Agree rated 7-10) | ▲61% | 59% | 55% | 60% | 65% | ▲63% | 62% | 67% |
| Interest in remote access – Electricity usage (% High interest rated 7-10) | 52% | ▼50% | 57% | 62% | 59% | 50% | 34% | 29% |
| Interest in remote access – Other appliances (% High interest rated 7-10) | 46% | ▼46% | 55% | 58% | 58% | 48% | ▼29% | 27% |
| Provider manages solar PV usage automatically (Base: Those with solar PV) | 22% | - | 17% | 9% | 26% | 6% | - | 1% |
| Electricity retailer is a trusted source of information | 35% | 32% | 30% | 37% | 37% | 37% | 45% | 42% |



▲▼ indicate statistically significant increases and decreases at the 95% confidence level in results in comparison to the previous year.
*Cells containing '-' do not show any results due to small sample sizes (n<50)

# **Profile Snapshot:** Sentiment and bills

Estimated average quarterly bill ($)


| All households | Renters in houses | Renters in apartments or townhouses | Family renters in houses | Family homeowners in houses | Homeowners in apartments or townhouses | Homeowners in houses | Retiree renters | Retiree homeowners |
|---|---|---|---|---|---|---|---|---|
| Percentage change in estimated average quarterly bill from 2024 (%) | +9% | +10% | +9% | +7% | +15% | +9% | -4% | +2% |
| Concern for paying electricity bill (% High concern rated 7-10) | 60% | 62% | 74% | 56% | 49% | 47% | 68% | 39% |
| Most concerning bill | MORTGAGE OR RENT | FOOD AND GROCERIES | FOOD AND GROCERIES | FOOD AND GROCERIES | FOOD AND GROCERIES | HOME INSURANCE | FOOD AND GROCERIES | HOME INSURANCE |
| Expected bill increases (% Increase by more than 15%) | 53% | ▼40% | 59% | ▲53% | 45% | 48% | 51% | 51% |
| Would accept poorer reliability to reduce bills | 16% | 15% | 20% | 12% | 12% | ▼10% | 16% | 7% |



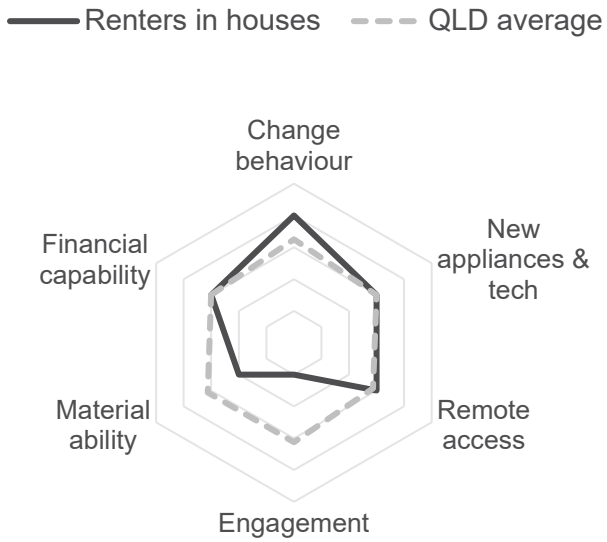
▲▼ indicate statistically significant increases and decreases at the 95% confidence level in results in comparison to the previous year.

# 4

# Household Profiles in Detail

Renters in houses

# Renters in houses




- Do not have dependent children
- Employed/Unemployed/In education/Other
- Rental accommodation
- Live in a house
- 7% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

These are participants who live in rental accommodation – either couples with no dependent children, a shared household of adults, or single with no dependent children. They live in a house and have the lowest average age of all profiles.

Most of them are in employment (with some self-employed). They are more likely than other working-age participants to be a student in formal education.

## CHANGE BEHAVIOUR

Renters in houses are among the highest likelihood to consciously try to reduce electricity usage. Many are also willing to adjust their electricity use behaviour to manage peak and minimum demand.

They have an average likelihood of switching to a daytime tariff to manage bill costs.

## NEW APPLIANCES/TECHNOLOGY

Renters in houses have lower than average incidence of solar PV panel installation and lower than average electric vehicle (EV) ownership compared to other profiles.

Their intention to purchase new technology, such as solar PV, EVs or a Home Energy Management System (HEMS) in the future is about average.

They have above-average interest in community battery schemes.

## REMOTE ACCESS

There is average interest in in participating in third-party control programs and in remote control of their electricity usage and other appliances. They have the lowest trust in electricity suppliers out of all profiles.

For those with solar PV, they have a higher likelihood of allowing their provider to optimise electricity usage.

## ENGAGEMENT

Renters in houses are some of the least engaged when it comes to analysing their bill. They are below average for checking all elements of their bill including overall cost, unit cost, amount used, comparison to last year, tariff earnings and electricity rebates.

These participants also have very low awareness of what tariff the household is using and low awareness of peak and minimum demand issues affecting the network.
They are less likely than others to know if their home has a smart meter.

As a result of these changes, the engagement rating of this profile has decreased this year.

## MATERIAL ABILITY

Renting is a significant barrier to new technology and improving energy efficiency in these homes. Being in a rental accommodation is the key reason for not having a solar PV system or a battery storage system in the property.

## FINANCIAL CAPABILITY

Renters in houses show higher levels of concern for their ongoing ability to pay a range of bills, including electricity and rent.

These participants also have a higher average quarterly bills compared to other profiles and a majority expect the price of electricity to increase over the next three years.

# Renters in houses

## WHAT ARE THE CHANGES IN 2025?

This year, renters in houses show increased trust and positive sentiment toward electricity retailers. They are more likely to think energy suppliers are working to make electricity more affordable (38%, 36% in 2024) and more likely to trust suppliers to do the right thing when faced with a problem (61%, 53% in 2024). They are also more satisfied with the reliability (71%, 62% in 2024) and security (60%, 54% in 2024) of their electricity supply. Additionally, they are more likely to trust their electricity supplier as a source of information (35%, 28% in 2024).

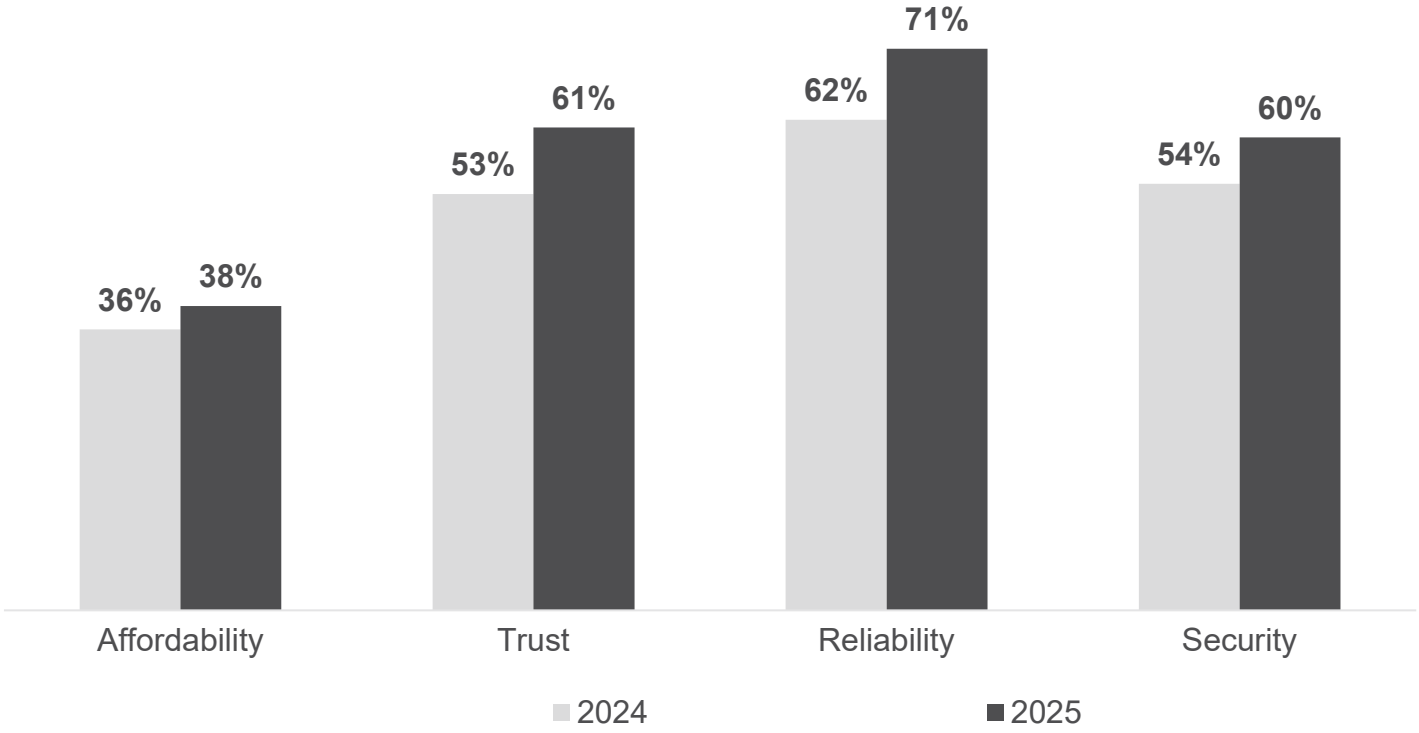
Renters in houses continue to see increases in their electricity bills ($490, up from $448 in 2024). Despite this increase, these households are no more concerned about their ongoing ability to pay their electricity bill (60%, 63% in 2024).

Renters in houses are more engaged with their bills. They are now more likely to almost always check the overall cost (57%, up from 54% in 2024), unit cost (30%, up from 25%), usage amount (48%, up from 41%), and whether any rebates have been applied to their bill (46%, up from 38%). In line with this, they are also more active in looking for other options - they are more likely to have looked into prices from other electricity companies (40%, up from 30% in 2024) and around a fifth have changed providers (21%).

As with other household profiles, renters in houses are more likely to have experienced power outages in the previous six months (64%, up from 53% in 2024). Despite this, those who experienced outages are more satisfied with the time taken to restore electricity (62% up from 48% in 2024) and the communication from their provider during the outage (48%, up from 37% in 2024).

Smart meter installation has grown among this segment, with 48% who now have one installed (up from 37% in 2024). These participants believe the most valuable aspect of a smart meter is the ability to have accurate meter readings (70%).

### Agreement with energy sentiment statements (% Agreement 7-10)



# Renters in houses

## ENERGY CHALLENGES AND OPPORTUNITIES

Renters in houses (either singles, couples, or shared houses) are showing more engagement with electricity companies and more trust in providers to deliver affordable or reliable services. Despite this, they are still facing some extreme bill pressures, but don't feel supported and are less likely than other profiles to use providers or government sources for support or advice.

They are doing everything they can to reduce usage and are the second most likely of all household profiles to have consciously tried to reduce their electricity consumption (77%). Bill pressures are front of mind, particularly housing costs (68% are concerned with their ability to meet rent payments).

## SHORT-TERM IMPACT

Renters in houses are less familiar with the details of their accounts and the issues facing providers. Despite being more engaged with most aspects of their bill this year, they still have low awareness of their current tariff (25% know what tariff structure they use, compared to 34% overall). They are also less likely to have heard of issues about peak (66%, 73% overall) and minimum demand (42%, 52% overall) facing the industry.

Just under half (48%) of these participants say they would be likely to shift to a daytime tariff as a means to reduce bills. However, the main barrier to making the switch is that most of their electricity usage happens during evening peak periods.

## LONG-TERM IMPACT

This group is mainly composed of couples without dependent children (42%) and those living in a shared home (41%). This high incidence of shared households means managing bills, usage, and behaviour can be more difficult than in nuclear families. Furthermore, living in rental accommodation creates a lack of agency to make upgrades and changes to the property to improve energy efficiency and reduce usage.

Participants in this profile are not likely to have the use of solar PV (21%, 46% overall), as renting is the principal barrier to this group (78%).

Around half of renters in houses support upfront investment in the energy system now for long-term benefits in the future (52% strongly/somewhat support). These participants are more likely than other household profiles to see environmental benefits for future generations (46% very important) and reducing carbon emissions (46%) as important long-term benefits of the energy system.

**77%** Consciously tried to reduce your electricity consumption in the past 12 months

**48%** Almost always check their bill for the amount of electricity used

**78%** Of those without solar PV say renting is the main reason they don't have panels

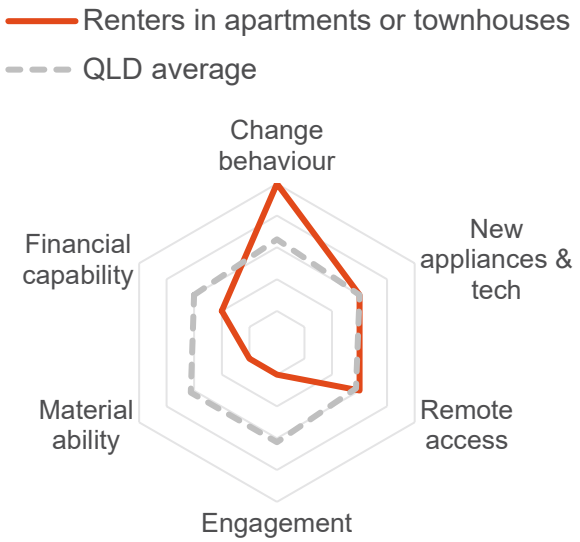
Return to the Household Profile Snapshots

# 4

# Household Profiles in Detail

Renters in apartments or townhouses

# Renters in apartments or townhouses




Do not have dependent children

Employed/Unemployed/In education/Other

Rental accommodation

Live in an apartment

9% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

This profile has a younger average age, living in rental accommodation which is a multi-dwelling building (unit/flat/apartment/townhouse/duplex). Most of them live in South-East Queensland's major metropolitan areas such as Brisbane or the Gold Coast.

They are more likely than other profiles to be living alone or in a share house of adults. While the majority are in full-time employment, they are also more likely than other working-age participants to be unemployed, or a student in formal education.

## CHANGE BEHAVIOUR

Renters in apartments or townhouses are the most likely of any profile to consider switching to a daytime tariff to reduce electricity bills, with many of them confident they could switch their electricity usage from the evening to the daytime.

They are one of the profiles that was most likely to have switched providers in the previous 12 months. They also show willingness to change how they use electricity to manage peak and minimum demand.

## NEW APPLIANCES/TECHNOLOGY

Renters in apartments or townhouses have the lowest incidence of solar PV panels installed among all profiles and have low intention to purchase them in the future.

Despite this, EV ownership among this group is growing and renters in apartments or townhouses report among the highest interest to purchase an EV. They show middling interest in purchasing a Home Energy Management System (HEMS) in the next three years, but above-average interest in community battery schemes.

## REMOTE ACCESS

This group has average interest in permitting third-party management of certain appliances. However, there is potential for growth, as they are more likely to be neutral to this technology rather than uninterested.

## ENGAGEMENT

This profile shows low engagement for a range of measures. Renters in apartments or townhouses have lower-than-average likelihood of checking some elements of their bill, including amount of electricity used, comparison to last year, and electricity rebates.

They also have the lowest awareness of their current tariff of any profile and are among the lowest awareness of peak and minimum demand issues.

## MATERIAL ABILITY

Renters in apartments or townhouses have very low material ability due to their household situation. Being in a rental accommodation and living in an apartment are the key reasons for not having a solar PV system or battery storage system in their property.

## FINANCIAL CAPABILITY

Renters in apartments or townhouses show some of the highest concern about their ability to pay electricity bills in the future. They also show higher-than-average concern for bills including rent, groceries, and internet services.

# Renters in apartments or townhouses

## WHAT ARE THE CHANGES IN 2025?

There are several areas in which renters in apartments or townhouses are showing less engagement with the energy usage and behaviours.

From an understanding perspective, fewer households in this segment report knowing when peak demand occurs (60%, down from 64%) and awareness of their current electricity tariff has declined from 28% to 22%. Despite these drops in energy literacy, trust in government sources of information has risen significantly, from 33% last year to 45% - now the most credible source of information (ahead of comparison sites, 41%).

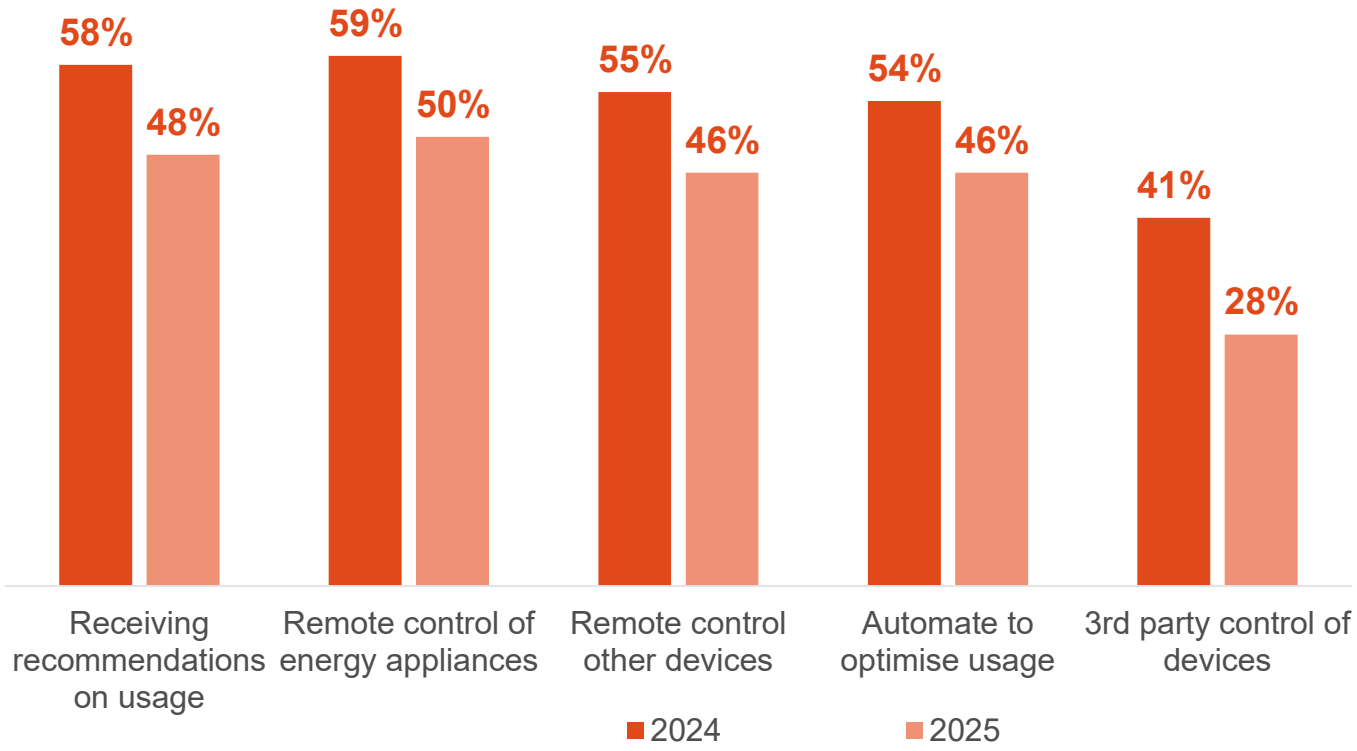
Households have also reduced their actions to monitor and reduce electricity usage – they are less likely to have taken steps to reduce electricity consumption (68%, down from 77%), or use supplier app to monitor usage (46%, down from 58%).

Looking forward, there is less interest in switching to a daytime tariff (50%, down from 58%) and less interest in purchasing a Home Energy Management System (HEMS) (35%, down from 40%).

Interest in the opportunities and benefits of remote access and automation of devices has decreased, with fewer households interested in receiving recommendations to save (48%, down from 58%), remote control of energy appliances (50%, down from 59%), remote control other electrical devices (46%, down from 55%), automation to optimise usage and bills (46%, down from 54%) and allowing third-party control of appliances (28%, down from 41%).

While the estimated average quarterly bill among renters in apartments or townhouses has increased 10% from $361 to $398, their concern with paying this bill has decreased to 62% (from 66%) and expectations of a 15% increase next year has also decreased (40%, down from 48%). Concern with paying other utilities bills have also decreased this year – including fuel, insurance and connectivity.

**Interest in energy management solutions (% Interested 7-10)**



# Renters in apartments or townhouses

## ENERGY CHALLENGES AND OPPORTUNITIES

Renters in apartments or townhouses have among the lowest household incomes in comparison to other non-retired profiles (37% have a yearly household income below $71k). This is likely because this group has higher-than-average proportions of students, people with caring responsibilities (i.e. caring for their children, or other family/friends) and unemployed persons (17%). Full-time employment in this segment has increased to 56% in 2025 (48% last year) and fewer participants are in part-time work (17%, down from 26%).

The age profile (being the youngest segment) and likely short-term tenancy in their properties makes it less likely that this segment would be interested in making strategic upgrades to their property; although this also drives the high levels of switching behaviour within this segment.

New technology provides an opportunity, with 63% of those in the market for a new car reporting that they would consider an electric vehicle. Community batteries are another example, with 42% of this segment having high interest in this option.

## SHORT-TERM IMPACT

Overall, results this year indicate a segment that feels less pressure around energy bills and is consequently stepping back from active participation in managing their electricity usage or engaging with energy-saving technologies.

They have low engagement in energy issues, including regularly checking aspects of their bill and awareness of peak and minimum demand, and this year have lower likelihood to monitor and reduce electricity usage or use supplier tools.

Renters in apartments or townhouses have backed away from issues of third-party control and remote access in 2025.

## LONG-TERM IMPACT

Renters in apartments or townhouses have the lowest incidence of solar PV of all profiles (12%) and intent to purchase solar PV has declined to 13% (down from 22% last year).

A lack of rooftop access in apartment complexes makes it difficult for individual solar PV systems to be installed. Being in rental accommodation also provides its difficulties, as any major changes to the property need the consent of the landlord and landlords may not be willing to pay for the installation of solar PV systems. Rental contracts are often short term, which means the tenants may not receive the full benefit if they invest in solar themselves.

This group is less enthusiastic about the beneficial role of the energy network, being less likely than other segments to rate reliability, employment, resilience and international competitiveness as very important aspects.

**62%** Have high concern in ability to pay upcoming electricity bills

**45%** Trust government resources for information about electricity

**26%** Switched electricity supplier in the past 12 months

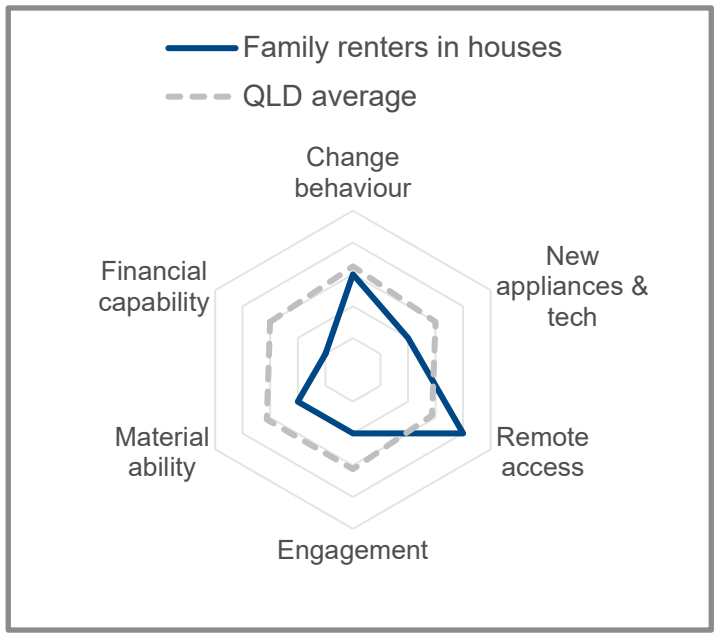
Return to the Household Profile Snapshots

# 4

# Household Profiles in Detail

Family renters in houses

# Family renters in houses




- Have dependent children
- Employed/Unemployed/In education/Other
- Rental accommodation
- Live in a house
- 9% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

This group of participants live in rental accommodation, either as a couple or as a single parent, with dependent children. Their residence is a house, and they are not retired (employed, self-employed, in education or not in paid employment).

They are more likely than other family profiles to be on a lower household income, be a single-parent family, and be unemployed or engaging in caring responsibilities.

## CHANGE BEHAVIOUR

Family renters in houses are more likely than average to consciously reduce their electricity consumption and have a higher-than-average likelihood to have changed electricity provider.

They are among the most likely to consider a daytime tariff to reduce bills. Those uninterested in a daytime tariff report higher concern that it would be hard to shift usage from peak hours.

## NEW APPLIANCES/TECHNOLOGY

These families have among the lowest incidence of having solar PV panels installed, and lower intention to make a purchase (either new, or to replace an existing system) in the future than other profiles. Few are in the market to purchase battery storage in the future.

Technology with a lower upfront cost is more appealing, and these families are more interested in purchasing a Home Energy Management System (HEMS) in the future than others.

## REMOTE ACCESS

While these families have an about-average level of interest in participating in a program of third-party control, they are more likely than other profiles to be interested in controlling their household devices remotely.

They have lower trust that electricity suppliers do the right thing for customers, which could become a barrier to working with suppliers in the future to manage usage.

## ENGAGEMENT

Engagement among this group has increased as they are more conscious of elements of their bills and have greater awareness of their tariff; however, this is still lower than several other groups. For wider electricity and network challenges, they are less likely to be aware of peak and minimum demand issues, and of community batteries.

As a result of these changes, the engagement rating of this profile has increased this year.

## MATERIAL ABILITY

Living in rental accommodation poses many barriers to improving energy efficiency or making purchases to better manage electricity usage. Firstly, the installation often requires making modifications to the property, which requires the consent of landlords. Secondly landlords may not be willing to pay for these upgrades without being able to recoup the outlay through higher rent. Finally, rental contracts are often short-term (usually 12 months), meaning the renter will not recover any value of the purchase while in the property if they invest themselves.

Being in rental accommodation is the key reason for not having solar PV system or battery storage in their property.

## FINANCIAL CAPABILITY

Families in rental properties receive a lower-than-average household income and one of the highest average quarterly electricity bills.

They are much more likely than average to be very concerned with their ability to pay electricity bills in the future and would be interested in ways to reduce their bill; even by accepting lower reliability.

# Family renters in houses

## WHAT ARE THE CHANGES IN 2025?

Family renters living in houses are feeling the strain of rising energy costs in 2025, with declining confidence in the affordability of their electricity bills and a decline in engagement with energy information, technology, and management tools.

Agreement that suppliers are making bills affordable has fallen to 32% (down from 38% in 2024), returning to levels last seen in 2023. This comes alongside a sharp rise in average quarterly bills, from $565 to $617.

Many in this segment do not see a reprieve in price rises, with an increase in the proportion expecting a 15% or higher bill increase in the coming year, now at 59% (up from 54%). Despite these pressures, high concern about bills has remained stable at 74% (75% last year).

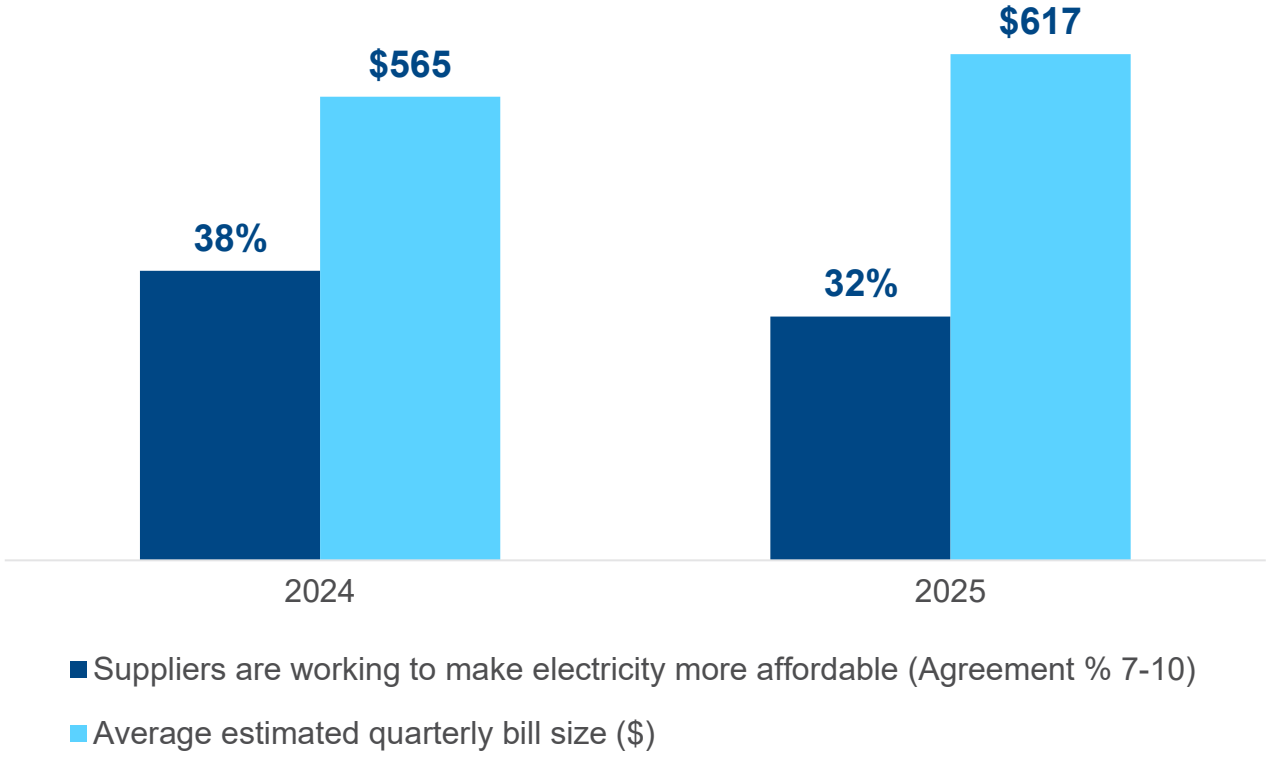
Anxiety regarding other household expenses has eased, with lower concern about ability to pay for bills such as fuel (64%, from 69%), home insurance (333%, from 48%), internet (42%, from 51%), mobile phone bills (41%, from 50%), and childcare (44%, from 54%).

Bundling options are also less common, with bundling of internet services falling from 13% to 8%, and mobile from 11% to 7%. Overall, bundling is now at 17%, down from 31%.

There has also been a sharp drop in those comparing electricity prices across suppliers. down to 34% from 46%, again returning to 2023 levels.

There is a broader drop in interest across most aspects of energy management: interest in receiving usage recommendations has declined (55%, from 60%), as has interest in remote control of non-appliance devices (55%, from 60%) and automation to optimise usage and bills (49%, from 54%). Fewer are open to third-party control of energy systems (32%, down from 40%), and interest in Home Energy Management Systems (HEMS) has also decreased to 37% (from 48%).

### Average estimated quarterly electricity bill and ‘Affordability’ agreement



# Family renters in houses

## ENERGY CHALLENGES AND OPPORTUNITIES

This group are seriously struggling with cost-of-living pressures and have among the highest and fastest-growing estimated electricity bills.

Bill pressure is such an issue for this segment that it is undermining their trust and confidence in the market. This segment has among the lowest levels of agreement for Affordability, Trust, Reliability and Security.

Family renters in houses are least likely to trust information from retailers or network service providers.

This group has the lowest support for investment in the energy system now for long-term future benefits (46%, 57% overall) and less likely to rate reliability, employment and recovery as very important long-term benefits.

## SHORT-TERM IMPACT

These households are looking for ways to reduce their bills by any means possible. They are more likely than others to change their provider, be consciously trying to reduce electricity usage, or be interested in a time-of-day tariff structure. Despite year-on-year declines, this segment are still more likely than average to be interested in remotely controlling devices and appliances in their household to manage bills.

Knowledge and energy literacy are challenges, with few households in this segment regularly checking aspects of their usage and bill, knowing what tariff they are using, or are reporting awareness of peak and minimum demand.

## LONG-TERM IMPACT

This is a segment that risks being left behind during the transition, and faces inequity on a range of measures. Family renters in houses often have little control over their housing and appliances, making it harder to access energy-efficient upgrades or rooftop solar, while still bearing the brunt of rising energy costs.

Rental houses have a very low incidence of appliances such as solar PV (21%, 68% among houses that are owned) and cost-of-living pressures means low intention to make big purchases such as solar PV (16%) or storage batteries (7% in the next three years).

**74%** Have high concern in ability to pay upcoming electricity bills

**33%** Expect a 25%+ increase to electricity bills in the next year

**20%** Have rooftop solar PV

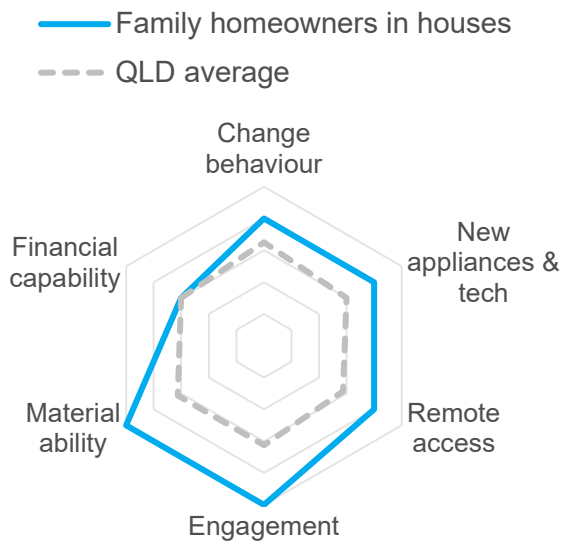
Return to the Household Profile Snapshots

# 4

# Household Profiles in Detail

Family homeowners in houses

# Family homeowners in houses




- Have dependent children
- Employed/Unemployed/In education/Other
- Own property
- Live in a house
- 23% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

These are families with dependent children (either couple or single parent) who own the house in which they are living. They are mostly aged 30 to 49 and are the largest cohort of all the profiles in this analysis.

Out of all the profiles, family homeowners in houses are the most likely to be in full-time employment. They also have the highest household income due to the high incidence of two working adults.

This profile represents the largest number of participants in the survey (23%), and as such has a more diverse range of attitudes and circumstances, which should be considered when thinking about this group.

## CHANGE BEHAVIOUR

This group is above the average for comparing electricity prices to other retailers in the past and switching providers.

They show average interest in switching to a daytime tariff. Those who are uninterested cite a higher concern it would be hard to shift usage from peak hours, particularly the evening peak.

Those with solar place the most importance on maximising consumption of electricity when their solar PV system is generating it. Those mains gas supply are more likely than average to have seriously considered converting to electricity.

## NEW APPLIANCES/TECHNOLOGY

Family homeowners in houses have one of the highest incidence of solar PV and among the highest intention to buy, replace or upgrade in the future. They also have a higher-than-average likelihood of owning a battery storage system and being interested in purchasing one in the future.

There is a high incidence of electric vehicle (EV) ownership.

These families also show one of highest interest in purchasing a Home Energy Management System (HEMS) in the future as well as high interest in participating in community battery schemes.

## REMOTE ACCESS

Family homeowners in houses have higher than average interest in third-party management and remote control of their appliances. They have average trust in electricity suppliers than other groups. The majority of those with an EV are open to vehicle charging being managed by a third party.

## ENGAGEMENT

They have above-average knowledge of what tariff their household is using. They also report among the highest awareness of peak and minimum demand issues. These families show average engagement when it comes to their bill analysis.

They are most likely to know if their home has a smart meter installed and they place a high value on the features this device can offer.

## MATERIAL ABILITY

These participants face significantly fewer barriers to invest in appliances and energy saving devices and technology. They own their property, so have licence to make changes and upgrades. Living in houses means their properties are more likely to have rooftops suited to installing solar PV systems, and higher likelihood of having off-street charging locations (either garage or carport) for EVs.

## FINANCIAL CAPABILITY

These families show average levels of concern for their ability to pay electricity bills. However, they do show higher-than-average concern for their ability to pay home insurance and school fees.

# Family homeowners in houses

## WHAT ARE THE CHANGES IN 2025?

Family homeowners in houses continue to experience rising electricity bills and are increasingly expecting further price hikes. However, concern about energy costs has not increased; likely offset by easing pressure from other household expenses such as fuel, car insurance, and mortgages.

The estimated quarterly electricity bill is now $419, a 9% increase from 2024. This has driven expectations of further electricity bill increases in the next 12 months, with 53% anticipating a 15% or greater rise (up from 48% in 2024). Despite this, high concern about electricity bills remains steady at 56% (59% last year), suggesting that cost pressures may feel less urgent in the context of declining concern around other bills.

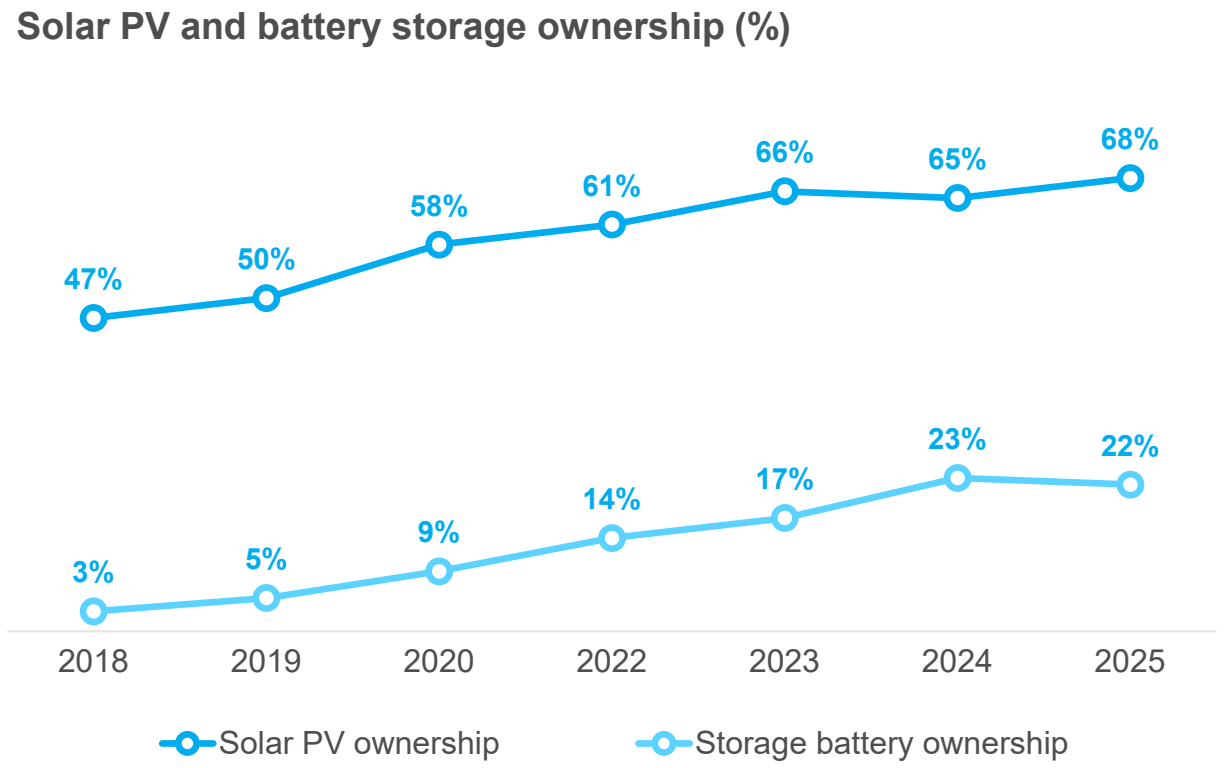
Monthly billing preference continues to grow, now at 45% (up from 39% in 2024), reflecting a shift toward more regular and manageable payment cycles among these households.

There is more interest in shopping around this year, with 44% of the segment having compared prices between suppliers (40% in 2024). However, switching behaviour remains unchanged at 19% (20% in 2024), highlighting a gap between comparison and action.

This group leads solar uptake, with 68% of households now having panels installed (up from 65% in 2024).

Motivations to buy, upgrade or replace solar systems are increasingly cost-driven: 60% cited the need for a larger system to reduce bills (up from 52%), while household battery purchases are stable at 37% (36% in 2024), and recent EV purchases have risen to 22% (from 18%).

Despite this, overall battery ownership remains flat at 22% (23% in 2024), pointing to barriers in broader battery adoption even as interest in related technologies increases.



# Family homeowners in houses

## ENERGY CHALLENGES AND OPPORTUNITIES

This segment has the most potential to benefit from the transition and use technology solutions to help them understand and manage their electricity bills.

They are energy literate, have relatively few financial barriers, and appreciate the challenges facing providers and the network. They are open to using new appliances or services, including third-party management, to become more efficient and reduce bills.

This group has moderate sentiment towards energy suppliers and are more likely to trust price comparison sites for energy information, news and pricing (41%) ahead of government sources or retailers (37%).

They are among the most supportive of upfront investment in the energy system now for long-term benefits in the future (61%, 57% overall) and believe the biggest benefits of investment will be affordable bills (68% very important) and a resilient network to recover quickly after natural disasters (64%).

## SHORT-TERM IMPACT

Family homeowners in houses are engaged with most aspects of electricity issues. A large proportion are aware of their tariff structure (42%, higher than average) and they are more aware of peak and minimum demand issues than other profiles.

There is high incidence of ownership or uptake of technologies or appliances such as smart meters, smart Home Energy Management System (HEMS) and converting gas appliances to electric.

Interest in time-of-use tariffs is limited by lifestyle restrictions with many in full-time employment and most active in the evening peak. They are less interested in daytime tariff than other profiles, with the main barrier being the ability to shift away from 4pm to 9pm (60%).

## LONG-TERM IMPACT

This household profile has the highest uptake of solar PV panels (65%) and 39% intend to purchase, upgrade or replace a system in the next three years. Battery storage is increasingly of interest to this group, but cost is a limiting factor, with 66% of those not intending to purchase a battery because batteries are currently too expensive and 30% because there are no government rebates when purchasing. Among this segment, 15% own an EV or plug-in hybrid.

**61%** Support upfront investment in the energy system

**44%** Likely to purchase HEMS in next three years

**26%** Have downloaded and use supplier app

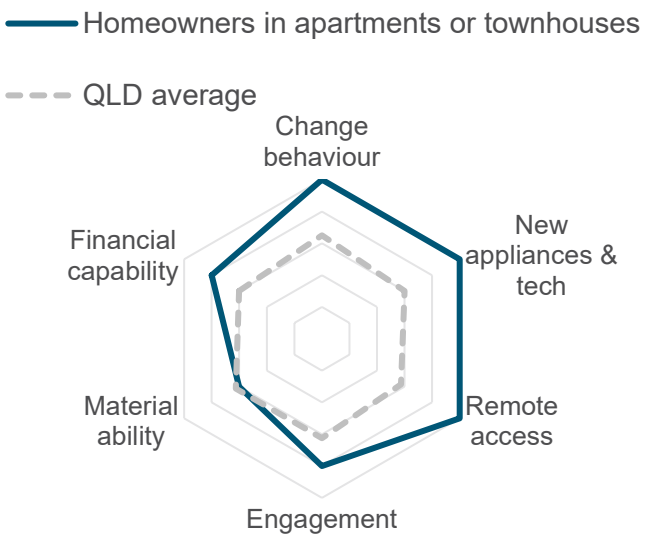
Return to the Household Profile Snapshots

# 4

# Household Profiles in Detail

Homeowners in apartments or townhouses

# Homeowners in apartments or townhouses




Some with children, some without

Employed/Unemployed/In education/Other

Own property

Live in an apartment

8% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

These participants own the home in which they are living reside in multi-dwelling buildings (unit/flat/apartment/townhouse/duplex). They are middle-aged and mostly live in cities such as Brisbane or Gold Coast.

The majority are employed full-time and earning mid-to-high household incomes. There is a mix of households, with just one or two occupants. and those with dependent children.

## CHANGE BEHAVIOUR

Homeowners in apartments are among the most likely to have switched electricity providers in previous 12 months. They are also the most likely to have compared electricity prices to other retailers.

There is higher interest in switching to using a daytime tariff than in other profiles. For those uninterested in a daytime tariff, there is higher concern it would be hard to shift usage from peak hours.

The majority with a mains gas supply have considered converting to electricity.

## NEW APPLIANCES/TECHNOLOGY

Homeowners in apartments have the highest incidence of electric vehicle (EV) ownership and highest consideration of purchasing in the future. They are also more interested in purchasing a Home Energy Management System (HEMS) in the future than others.

Despite having lower than average incidence of solar PV, there is higher than average interest in purchasing a system in the future. They are also the most likely to have downloaded an app to manage electricity usage. This group is driving the uptake of battery storage.

## REMOTE ACCESS

These participants have among the highest interest in permitting third-party management of certain appliances. They also have high interest in remotely controlling their electricity and other appliances.

## ENGAGEMENT

Homeowners in apartments have average levels of engagement when it comes to their bill analysis. They also have higher-than-average awareness of which tariff their household is on, and of peak and minimum demand issues.

## MATERIAL ABILITY

Living in multi-dwelling buildings is the main barrier impacting the material ability of these participants. Lack of rooftop access in apartment complexes is the primary reason for not being able to purchase rooftop solar PV systems and charging options for EVs may be scarce.

## FINANCIAL CAPABILITY

Homeowners in apartments have among the lowest concern for their ongoing ability to pay electricity bills in the future. They have average levels of concern for other bills such as mortgage, groceries and fuel.

They have around-average quarterly bills and are less likely to think that electricity prices will increase significantly over the next three years compared to other groups.

# Homeowners in apartments or townhouses

## WHAT ARE THE CHANGES IN 2025?

Homeowners in apartments or townhouses have again experienced significant increases in their electricity bills; however, their cost-of-living concerns have decreased across a range of expenses. They continue to explore technology and behaviour changes to manage their electricity bills.

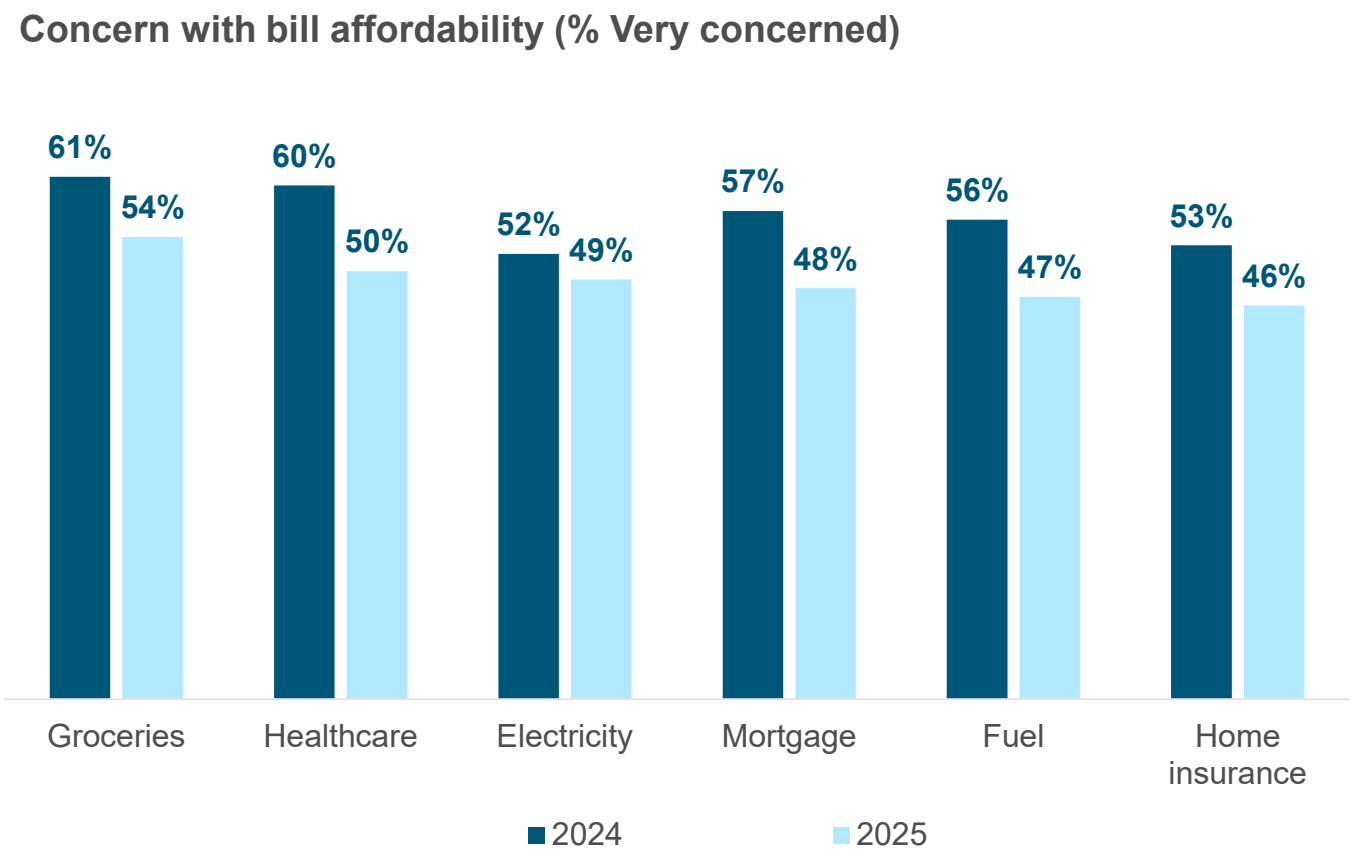
Estimated quarterly electricity bills increased 15% this year (the most of any segment) from $361 to $416.

Cost-of-living concerns among this segment have eased somewhat this year: there is lower concern with ability to afford expenses including groceries, fuel and mortgage. Concern regarding ability to meet electricity bills is at 49% (53% in 2024) and relatively, this is now one of the most concerning expenses for this segment.

Homeowners in apartments or townhouses are looking to manage bills by shifting to monthly billing (42%, up from 33% in 2024) and using bundling discounts: 35% now bundle their electricity bill with another utility/service (up from 31% last year). This is the most of any segment.

This group is increasingly open to shifting to a daytime tariff, with 61% reporting interest in this option (up from 52%). This is driven by more households saying they already engage in this behaviour (30% of those interested in switching, up from 23%).

There are indications of lower engagement with bills and communications from electricity retailer this year, with fewer households almost always checking the unit cost of electricity (29%, down from 35%), the amount of electricity used by the household (46%, down from 52%), and making year-on-year comparisons (49%, down from 53%).



# Homeowners in apartments or townhouses

## ENERGY CHALLENGES AND OPPORTUNITIES

Homeowners in apartments or townhouses are one of the most capable profiles, able to change their usage behaviour and invest in technology. The majority are in employment: 70% work full-time, 16% work part-time and 5% are self-employed, with an above average household income (36% have an annual household income of over $151k).

As well as being financially capable, they are interested in investing in a range of new technologies and this segment drives uptake of HEMS, EVs and interest in community batteries.

This year, trust in information from network service suppliers (Energex) has increased to 24% (14% last year) which is the most of any segment.

The biggest challenge for these households in multi-occupancy buildings will be accessing the necessary infrastructure and facilities to engage with the transition; for instance, access to solar, batteries, and EV charging.

## SHORT-TERM IMPACT

Homeowners in apartments or townhouses are willing to changing their behaviour when it comes to electricity usage and tariffs. They are the most likely of all profiles to consider changing tariff options if time-of-use tariffs were available (61%, 57% last year). Furthermore, 25% of those with mains gas would seriously consider converting from gas to electricity-only, among the highest of any profile.

This group also shows keen interest in third-party management and remote access, with 43% having high interest (rated 7-10) in third-party management of certain appliances. They also report high levels of interest in remote control of their appliances to manage electricity (59% high interest rated 7-10) and for other appliances (58%).

## LONG-TERM IMPACT

This group has lower than average incidence of solar (28%, down from 36% last year) in comparison to other profiles. Lack of rooftop access in apartment complexes makes it difficult for individual solar PV systems to be installed. Just under half (46%) said living in an apartment was the main barrier to purchasing solar.

While there has been a drop in intention to purchase solar this year (34%, down from 44% in 2024), there is more interest to purchase a storage battery in the next three years (8%, up from 3%).

More than two-thirds support upfront investment in the energy system now for future long-term benefits (68%). The most important long-term benefits are a network that is resilient to natural disasters (61% very important), and affordable (60%). They are more likely than other segments to regard an energy system that supports Queensland's international competitiveness (38%) as an important long-term benefit.

**8%** Intend to purchase storage battery in the next three years

**43%** Interest in participating in programs where an organisation can manage appliances

**25%** Gas customers have given serious consideration to converting to electric

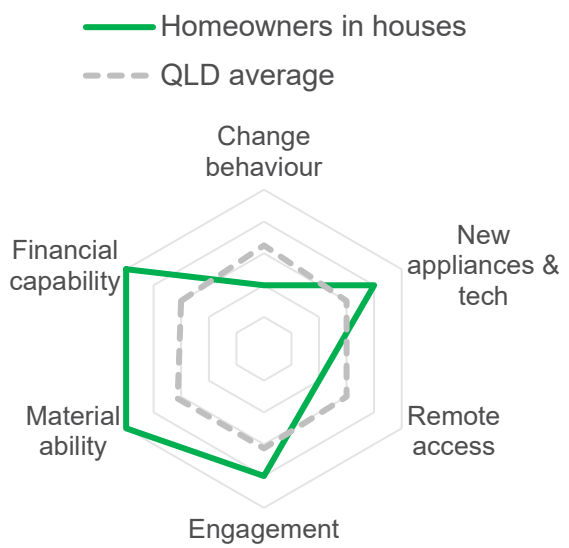
Return to the Household Profile Snapshots

# 4

# Household Profiles in Detail

Homeowners in houses

# Homeowners in houses




- Do not have dependent children
- Employed/Unemployed/In education/Other
- Own property
- Live in a house
- 16% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

These tend to be older participants (aged 50 to 69) without any dependent children, who own the house they live in. They are mainly single or couples, with some shared household of adults.

They are not yet retired, so are still either employed, self-employed, in education, or not in paid employment. They also have higher household incomes due to the high incidence of two working adults.

## CHANGE BEHAVIOUR

Homeowners in houses show lower interest in shifting to a daytime tariff. Those not likely to switch to a daytime tariff report they would find it difficult to shift their electricity usage away from peak time and they do not want to be constrained about time of usage.

These participants are also less likely to have switched their electricity provider in the previous year. A high electricity bill is the main thing that would encourage them to investigate new tariff options.

## NEW APPLIANCES/TECHNOLOGY

Homeowners in houses have among the highest ownership of solar PV systems. Those without solar are more interested in purchasing a solar PV system in the future than other profiles. There is high intention to purchase battery storage in the future.

There is lower incidence of electric vehicle ownership in this group (EV). However, those in the market for a new car are more likely than other profiles to consider purchasing an EV for their next vehicle.

## REMOTE ACCESS

Homeowners in houses are less likely than most other profiles to be interested in a program to permit third-party control of appliances. They also show below-average levels of interest in remote control of their electricity and other appliances.

## ENGAGEMENT

Homeowners in houses have higher levels of engagement with most aspects of their bill, including, overall cost, unit cost, electricity usage, year-on-year comparisons and feed-in tariffs.

They have above-average knowledge of what tariff their household is currently using and also have higher awareness of peak and minimum demand issues.

## MATERIAL ABILITY

There are significantly fewer barriers to invest in appliances and electricity saving devices and technology for these participants. They own their property, so they have licence to make changes and upgrades.

Being in a house they are more likely to have rooftops appropriate for installing solar PV systems, and higher likelihood of having off-street charging locations (either garage or carport) for EVs. The main barriers stopping the purchase of solar are the financial viability and affordability concerns.

## FINANCIAL CAPABILITY

Homeowners in houses have average quarterly bills compared to other profiles. Despite this, they have low concern about their ability to pay electricity bills in the future. They also have below-average levels of concern for their ability to pay for groceries, mortgage, gas, internet, phone and childcare.

# Homeowners in houses

## WHAT ARE THE CHANGES IN 2025?

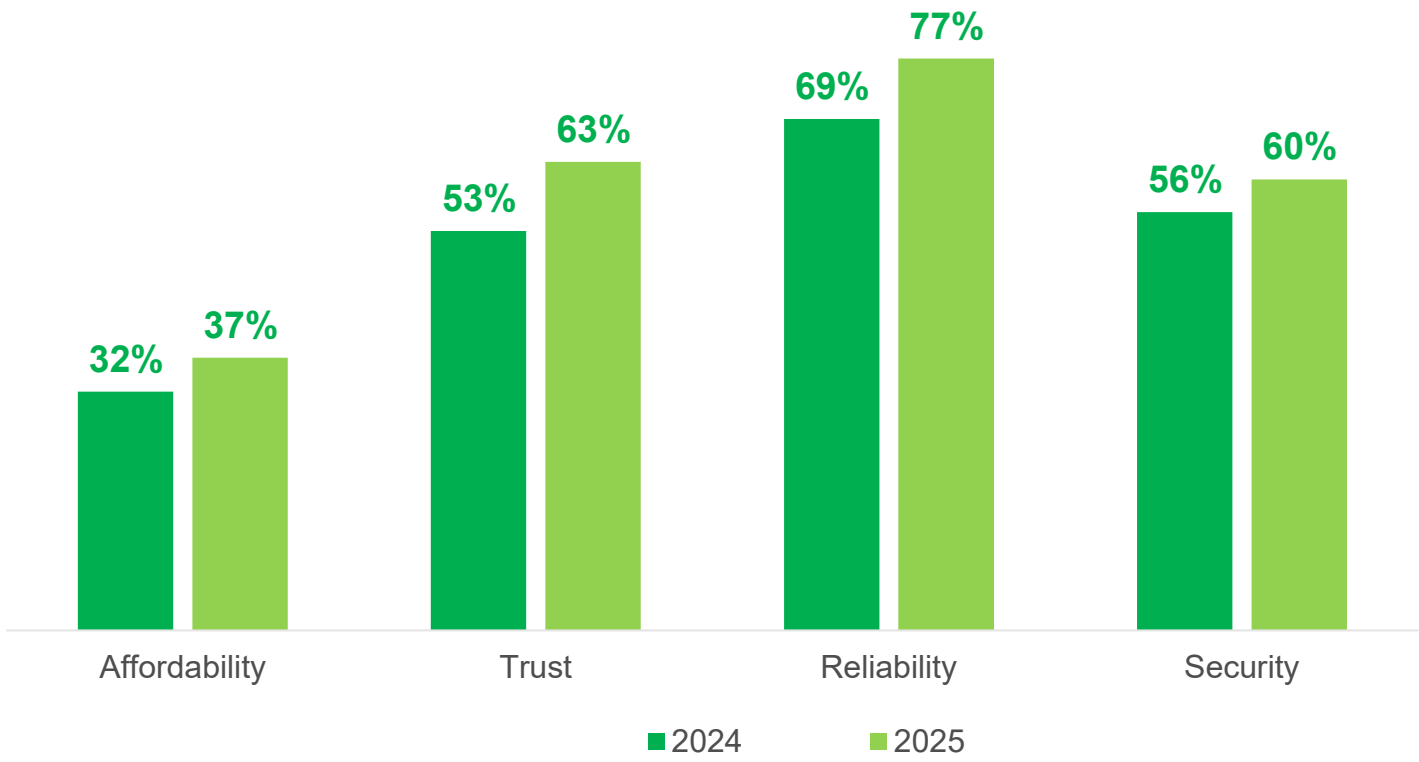
General sentiment towards electricity providers has increased for all measures. These households are more likely to think energy suppliers are working to make electricity more affordable (37%, 32% in 2024) and more likely to trust suppliers to do the right thing when faced with a problem (63%, 53% in 2024). They are also more satisfied with the reliability (77%, 69% in 2024) and security (60%, 56% in 2024) of their electricity supply. These participants are also more trusting of their electricity supplier as a source of information (37%, 35% in 2024).

These participants have experienced a 9% increase in their average quarterly bill over the past year ($419, $383 in 2024). Despite this increase, they report no increase in concern about their ongoing ability to pay their electricity bills (47%, same as last year).

Homeowners in houses are more likely to have experienced power outages in the previous six months (69%, up from 59% in 2024). Despite this, those who experienced outages are more satisfied with the time taken to restore electricity (60% up from 50% in 2024) and the communication from their provider during the outage (45%, up from 36% in 2024).

Homeowners in houses continue to have among the highest incidence of solar PV ownership (60%, 62% in 2024). Many (39%) have a solar PV system that is more than six years old (installed in 2019 or prior). This is causing many to look to upgrade or replace their system because their current one is faulty, damaged, or becoming less efficient (41%, up from 39% in 2024). Among those who have solar, battery storage ownership is now at 18% (16% in 2024). Interest in battery storage continues to grow, with one-fifth (20%) intending to purchase this in the next three years.

### Agreement with energy sentiment statements (% Agreement 7-10)



# Homeowners in houses

## ENERGY CHALLENGES AND OPPORTUNITIES

This is a highly engaged audience with the means and capability to participate in the electricity market in a number of ways, including technology and new products. They have the physical and financial means to access a range of solutions to maximise their generation and storage capabilities.

These participants embrace solar PV and storage batteries and are starting to show more interest in electric vehicles (EVs) and third-party management. They also report increasing interest in Home Energy Management Systems (HEMS) and smart appliances. Many would change tariffs when looking to purchase solar, battery storage, or an EV.

Due to the increasing uptake and high intention to purchase battery storage in the next few years, this is a potential way to encourage behaviour change to manage peak and minimum demand. Cost is the main barrier to greater uptake of battery storage.

## SHORT-TERM IMPACT

These participants are highly engaged with their electricity communication and are more likely compared to other household profiles to almost always check their electricity bills for overall cost (61%), unit cost (33%), amount of electricity used (54%), year-on-year comparisons (55%), and feed-in tariff earnings (60%).

In line with this, they also have high awareness of their current tariff (43%) and have high awareness of peak (76%) and minimum demand (59%) issues. They are more likely than other profiles to change the timing of their electricity use to manage peak and minimum demand issues and are increasingly likely to shift to a time-of-use tariff (51% likely, up from 45% in 2024).

## LONG-TERM IMPACT

The majority already have solar PV systems (60%), and 31% intend to purchase or replace/upgrade their solar PV system in the next three years.

Storage batteries are of great interest to homeowners in houses, and they are conscious of the benefits and barriers of this technology. Almost half (46%) of these households with solar intend to purchase battery storage in the next 10 years. The main motivations for getting batteries are to store excess solar generation (59%), to reduce electricity bills (58%), and to become more self-sufficient (45%).

Homeowners in houses are more likely than other household profiles to support upfront investment in the energy system now for long-term benefits in the future (59% strongly/somewhat support). The most important long-term benefits to these households are a network that is resilient to natural disasters (69% very important), affordable (68%), and reliable (63%).

**60%** Have solar PV panels

**20%** Intend to purchase battery storage in next three years

**59%** Support upfront investment in the energy system now for long-term benefits

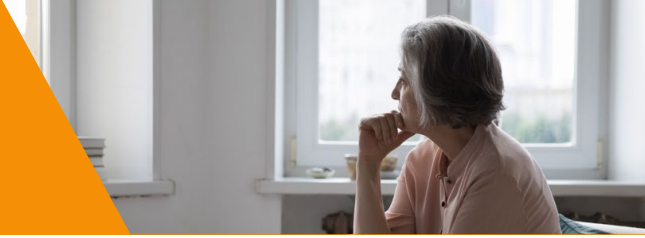
Return to the Household Profile Snapshots

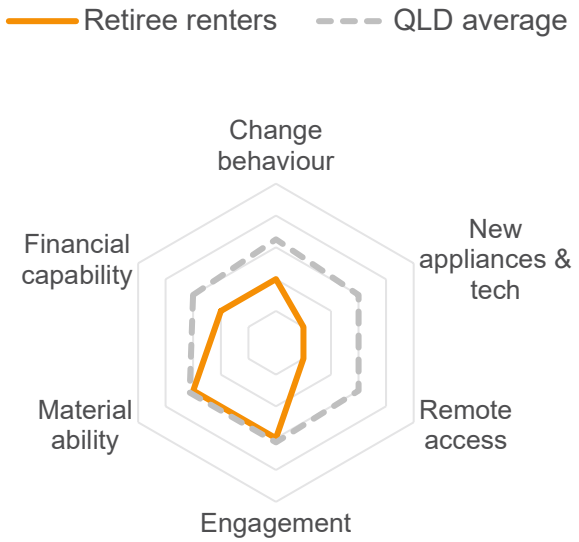
# 4

# Household Profiles in Detail

Retiree renters

# Retiree renters






- Do not have dependent children
- Retired
- Rental accommodation
- Live in a house or apartment
- 5% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

These are older participants who live in rental accommodation; either in a house or in a multi-dwelling building, such as a unit, flat, apartment, townhouse or duplex.

They are retired or on a disability pension, and report the lowest household income of all profiles in this survey. They are also the most likely to be living alone.

## CHANGE BEHAVIOUR

Retiree renters are less likely than average to change the timing of their electricity usage to help manage peak and minimum demand issues.

These participants show average levels of interest in switching to a daytime tariff. For those not interested in switching, their main reason is that they don't want to be constrained about when they can use their electricity.

They are also less likely to have switched electricity providers in the previous year, or to have considered changing from gas to electricity only.

## NEW APPLIANCES/TECHNOLOGY

There is little enthusiasm for purchasing new technology and appliances. They have the lowest incidence of solar PV system installation, and the lowest intention to purchase a system among all of the profiles. They also have very low ownership and consideration of electric vehicles (EVs).

They also have low likelihood of purchasing a Home Energy Management System (HEMS) in the next three years and are among the lowest likelihood of bundling any packages with their electricity service.

## REMOTE ACCESS

Retiree renters have lower interest in permitting third-party management of certain appliances. They also show lower levels of interest in remotely controlling their electricity and other appliances themselves.

## ENGAGEMENT

Retiree renters have average levels of engagement across all aspects of their bill except for rebates, which they check more regularly compared to others.

They have low awareness of what tariff their house is on and of peak demand and minimum demand issues.

## MATERIAL ABILITY

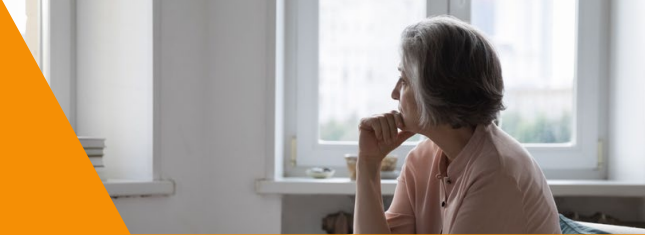
For these participants, renting is a significant barrier to new technology and improving energy efficiency in their homes. Being in a rental accommodation is the key reason for not having a solar PV system or battery storage system in their home.

## FINANCIAL CAPABILITY

Despite having lower-than-average bill size, retiree renters have higher-than-average concern for their ongoing ability to pay electricity bills. They also have above-average concern about their capacity to pay for groceries, rent, internet and mobile.

As with the other profiles, the majority of households in this group expect electricity prices to increase in the next three years.

# Retiree renters



## WHAT ARE THE CHANGES IN 2025

Retiree renters have seen a slight decrease in their estimated average quarterly bill in the last year ($355, up from $368 in 2024). Despite this, they are now more concerned about their ongoing ability to pay their electricity bills (68% high concern rated 7-10, up from 65% in 2024). These participants are also more likely to expect prices to significantly increase in the next three years (51% expect prices to increase by 15% or more, 48% in 2024).

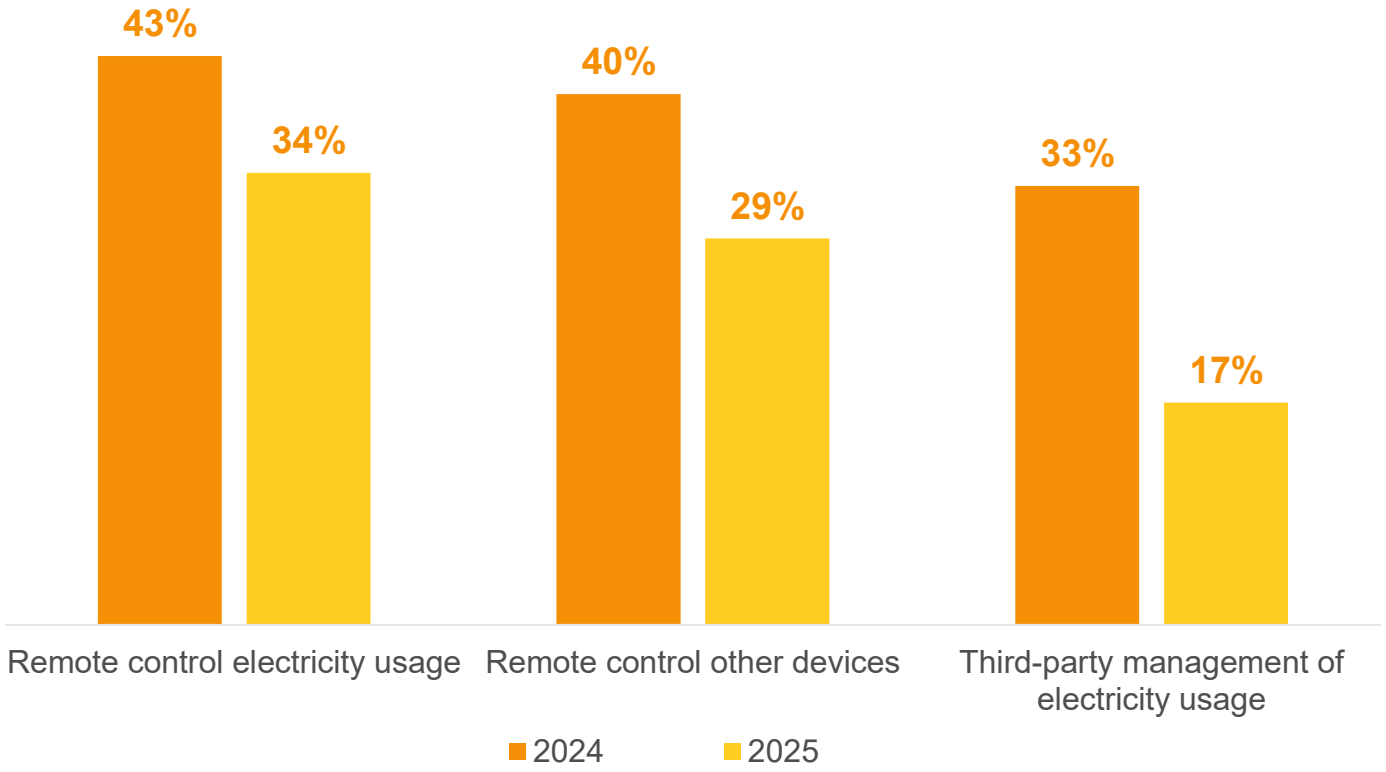
Retiree renters still show high levels of engagement with their bills. A majority of retiree renters still almost always check the overall cost (63%), the amount of electricity used (52%), year-on-year usage comparisons (54%) and whether electricity rebates have been applied to their bill (66%). Most retiree renters are also still making a conscious effort to reduce their electricity consumption (74%, 78% in 2024).

In line with overall results, retiree renters are more likely to have experienced power outages in the previous six months (51%, up from 45% in 2024). Despite this, those who experienced outages are more satisfied with the time taken to restore electricity (60% up from 55% in 2024).

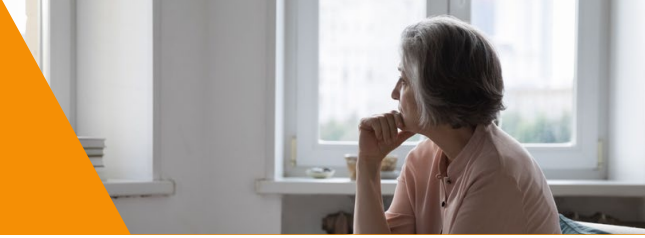
This year, retiree renters are less interested in services to remotely manage their electricity and other appliances (remote management of electricity: 34% high interest, down from 43% in 2024, other appliances: 29%, down from 40% in 2024). Interest in third-party management of certain appliances has also reached an all-time low (17%, down from 33% in 2024). They are also less likely to purchase a HEMS (14%, down from 22% in 2024).

Retiree renters have had a drop-off in interest in making major energy purchases, including solar PV (3%, down from 7% in 2024), battery storage (5%, down from 14% in 2024) and electric vehicles (10%, down from 13% in 2024). Renting continues to be the main barrier to purchasing solar (80%, 77% in 2024).

### Interest in energy management services (% High interest rated 7-10)



# Retiree renters



## ENERGY CHALLENGES AND OPPORTUNITIES

Retiree renters make up the smallest profile (5% of participants in the survey) and are potentially the most vulnerable. Around two-fifths (37%) of these households have only one resident, the highest of any profile. Over a third (36%) are on a disability pension, the highest of any group and much higher than retiree homeowners (4%). They also have the lowest household income of all profiles, with 60% earning an annual household income of less than $51k.

While these participants face many challenges, they do have opportunities to reduce their bills and become more energy efficient. The majority (82%) are in the house between 8am to 5pm every weekday, a dynamic that lends itself well to using a daytime tariff. However, only half (49%) of retiree renters would be interested in shifting to a daytime tariff. The main barrier for those unlikely to switch is that they don't want to be constrained around when they can use electricity (54%).

## SHORT-TERM IMPACT

Retiree renters are still unlikely to switch suppliers or investigate tariff options. Only 15% have changed their electricity provider in the past year, and just 26% have looked into prices from other electricity companies. The main motivators driving the investigation of tariff options would be receiving a high electricity bill (62%) and a promotion from their electricity retailer (33%).

This group now has higher awareness of peak demand (73%, up from 64% in 2024) and minimum demand issues (39%, up from 30% in 2024). However, these levels of awareness are still low compared to other household profiles.

## LONG-TERM IMPACT

Retiree renters face significant barriers to investing in new technology, which may have adverse consequences in the long term. Retiree renters have the second-lowest incidence of solar PV of all profiles (12%) and the lowest intention to purchase (3%). Renting is the main barrier to installing solar PV (80%). They also have the lowest incidence of electric vehicle ownership (1%) and the lowest likelihood of purchasing a Home Energy Management System (HEMS) (14% very/somewhat likely). With limited ability to invest in new energy-efficient technology, there is a need to support these households to identify behavioural changes that reduce bills and increase energy efficiency.

Retiree renters are less likely than other household profiles to support upfront investment in the energy system now for long-term benefits in the future (50% strongly/somewhat support). Their most important long-term benefits are a network that is resilient to natural disasters (74% very important), affordable (74%), and reliable (65%).

**36%** Are on a disability pension

**26%** Have looked into prices from other electricity companies

**80%** Say the main reason for not having solar is that they are currently renting

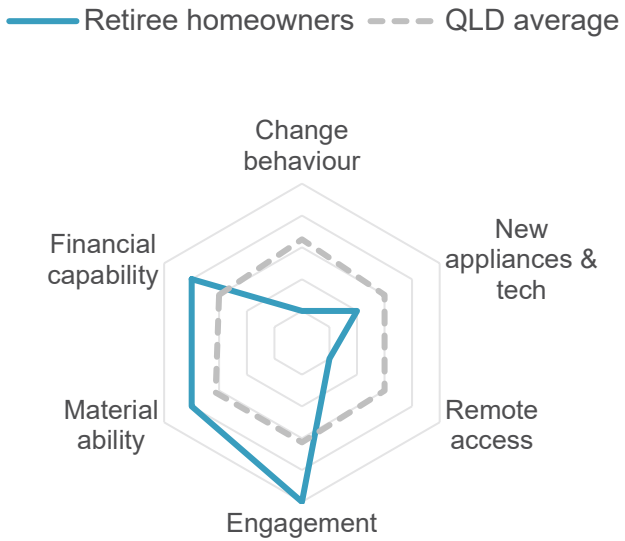
Return to the Household Profile Snapshots

# 4

# Household Profiles in Detail

Retiree homeowners

# Retiree homeowners




- Do not have dependent children
- Retired
- Own property
- Live in a house or apartment
- 16% of Queensland households

## WHO ARE THESE HOUSEHOLDS?

These are older participants who are retired and own the home they live in. They are either a couple with no dependent children, or single. They live in a house or multi-dwelling building, which is likely to be an older property (more than 20 years old).

## CHANGE BEHAVIOUR

Retiree homeowners show little interest in changing their behaviour. They are the least likely to have switched providers in the previous 12 months and the least likely to have reduced their electricity usage.

This group are the most likely to have older PV systems and have the highest incidence of receiving the Queensland Solar Bonus Scheme feed-in tariff of $0.44/kWh. Many would not change their electricity usage to maximise solar generation because they prefer to receive the feed-in tariff. Many who receive the Queensland Solar Bonus Scheme are also reluctant to purchase a battery in case it risks their eligibility for the scheme.

In line with this, they are the least likely to consider a daytime tariff to reduce bills. The main reason for not being interested in a daytime tariff is unwillingness to be constrained about when to use electricity.

They are also less likely to have considered changing their appliances from gas to electricity.

## NEW APPLIANCES/TECHNOLOGY

These participants have among the highest incidence of solar PV systems, but lower-than-average intention to buy or replace a system in the future. Among solar owners, they have the lowest incidence of battery storage systems and lower interest in purchasing a system in the future.

Despite the high incidence of solar, there is among the lowest incidence of EV ownership. They also show little enthusiasm in purchasing a Home Energy Management System (HEMS) in the next three years.

## REMOTE ACCESS

Retiree homeowners have the lowest interest in third-party management of certain appliances of all profiles. They also show the least interest in remote control of their electricity usage and other appliances compared to other profiles. Despite this, they have high levels of trust in electricity suppliers to do the right thing if a problem arose.

## ENGAGEMENT

Retiree homeowners are the most engaged of all profiles. They are the most likely to always check elements of their electricity bill, including unit cost, usage, comparisons, feed-in tariff income and application of rebates. Compared to other profiles, they have higher awareness of their current tariff, the highest awareness of peak demand issues, and high awareness of minimum demand.

## MATERIAL ABILITY

This group faces significantly fewer barriers to investing in appliances and energy-saving devices and technology. They own their property and have licence to make changes and upgrades. With most of them living in a house, they are more likely to have appropriate rooftops to install solar PV systems. The main barrier to the purchase of solar is financial viabiity.

## FINANCIAL CAPABILITY

Retiree homeowners have the lowest concern about their ongoing ability to pay their electricity bills of all profiles. They also have low concern for paying bills including groceries, fuel, mortgage. Their most concerning bill is home insurance.

This group has the lowest average quarterly bill of all profiles. For those with solar PV systems, most say they receive a credit on their electricity usage, rather than having to pay a bill.

# Retiree homeowners

## WHAT ARE THE CHANGES IN 2025?

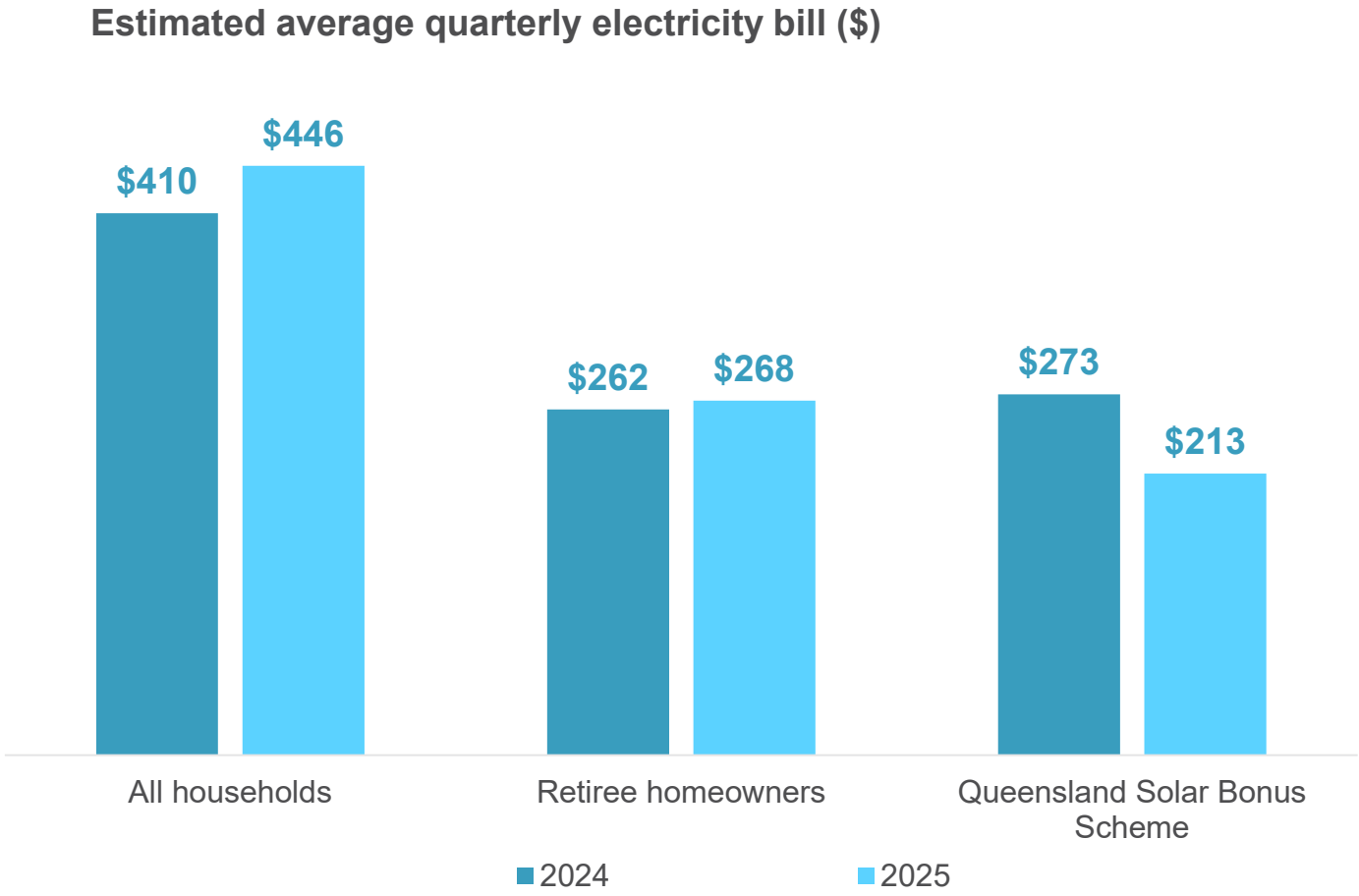
Retiree homeowners continue to report the lowest estimated average quarterly bill of all profiles ($268), and their bills are consistent with last year ($262 in 2024). They have among the highest incidence of solar PV ownership (68% have a solar PV system installed in their property) and are able to take advantage of high feed-in tariff (FIT) rates to reduce their bills. One quarter (25%) of retiree homeowners with solar PV still receive the $0.44 per kWh feed-in tariff as part of the Queensland Solar Bonus Scheme (QSBS) (down from 29% in 2024). Retiree homeowners receiving this tariff have seen a reduction in their bills ($213 down from $273), and 46% receive a credit on their electricity bills (45% in 2024).

In line with their bill changes, retiree homeowners show consistent levels of concern for their ongoing ability to pay their electricity bills (39% high concern rated 7-10, 39% in 2024); however, those on the QSBS now report less concern (30% down from 34% in 2024). Despite this, retiree homeowners are now more likely to expect prices to significantly increase in the future (51% expect prices to increase by 15% or more, up from 46% in 2024).

As with overall results, retiree homeowners are more likely to have experienced power outages in the previous six months (60%, up from 48% in 2024). Despite this, those who experienced outages are more satisfied with the time taken to restore electricity (62% up from 57% in 2024) and the communication from their provider during the outage (42%, up from 36% in 2024).

These participants have not shown any further interest in the uptake of new technologies. There have been no changes in the intention to purchase or upgrade solar (13%, same as last year) and the intention to purchase battery storage (15%, 13% in 2024). Those in the market for a new car report no change in their likelihood of considering purchasing an EV (51%, 49% in 2024).

This group shows similar levels of interest in remote control of their electricity and other appliances (electricity: 29% high interest, 31% in 2024, other: 27%, 29% in 2024). However, their interest in third-party management of appliances has reached a new low of 14% (down from 17% in 2024).



# Retiree homeowners

## ENERGY CHALLENGES AND OPPORTUNITIES

The high incidence of solar PV systems (68%) provides both an opportunity and a challenge for this group. Many have had their solar PV systems since before 2017 (36%), and a quarter (25%) also still receive the Queensland Solar Bonus Scheme (QSBS), which makes many of them unwilling to change their behaviour due to receiving low or no bills.

Retiree homeowners are less likely to upgrade or replace their solar PV system (13%) than other homeowners. However, wanting to reduce electricity bills is the main driver for those wanting to replace or upgrade their system. Those receiving the QSBS are reluctant to make upgrades to their system, which could cause them to lose their feed-in tariff rate.

They are the least likely of all profiles to switch to a daytime tariff that offers cheaper electricity during the day (40% very/quite likely). Their main reason for not switching to a daytime tariff is not wanting to be constrained around when they use electricity (45%). Those who are likely to switch would do so because they already use more electricity during the day (45%).

## SHORT-TERM IMPACT

Retiree homeowners have high engagement with their bills and usage. They have the highest likelihood of always checking the following aspects of their bill: overall cost (64% almost always check), unit cost (39%), electricity usage (58%), previous usage (62%), feed-in tariff earnings (70%) and electricity rebates (73%).

Despite high engagement, they are not likely to switch suppliers or investigate tariff options. Only 10% of retiree homeowners have changed their electricity provider in the past year, and only 32% have investigated prices from other providers. The main driver for investigating tariff options would be receiving a high electricity bill (54%) or a promotion from their retailer (37%).

## LONG-TERM IMPACT

The primary long-term impact is still the cessation of the QSBS in 2028. Once they are no longer receiving the high feed-in tariff rates, electricity bills will significantly increase for many in this segment. Retiree homeowners currently show very low interest in new technologies such as battery storage (15% of those with solar intend to purchase in the next three years), electric vehicles (16% would consider buying an electric car), and Household Energy Management Systems (16% very/somewhat likely to purchase). They are also less likely to have consciously tried to reduce their electricity consumption (69%). By 2028, these participants will need to have invested in new technologies or adapt their behaviour to avoid significant bill increases.

A majority (58%) of retiree homeowners support upfront investment in the energy system now for long-term benefits in the future. The most important long-term benefits are a network that is resilient to natural disasters (80% very important), reliable (77%), and affordable (72%). They are less likely than other segments to say that environmental benefits (42%) and reducing carbon emissions (36%) are important long-term benefits.

**68%** Have a solar PV system installed at their property

**46%** Of those receiving the Queensland Solar Bonus Scheme receive a credit for their electricity bill

**58%** Support upfront investment in the energy system now for long-term benefits

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For more information contact:

**John Remington**

0411 407 151

john.remington@essentialmedia.com.au