European Commission

FLASH EUROBAROMETER 566

Consumer behaviour in the energy transition

EUROBAROMETER REPORT

JUNE – JULY 2025

flash Eurobarometer 566
Consumer behaviour in the energy transition

Survey conducted by Ipsos European Public Affairs at the request of the European Commission, Directorate-General for Energy

Survey coordinated by the European Commission, Directorate-General for Communication (DG COMM "Public Opinion and Citizens Engagement" Unit)

This document does not represent the point of view of the European Commission. The interpretations and opinions contained in it are solely those of the authors.

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The purpose of this "provisional" document is to enable more people in the European Union to become aware of documents produced by the European Union (and financed by their taxes).

If there are no translations, citizens are excluded from the debate.

This document "Eurobarometer" only existed in English, in a pdf-file. From the initial file, we created a odt-file, prepared by Libre Office software, for machine translation to other languages. The results are now available in all official languages.

It is desirable that the EU administration takes over the translation of important documents. "Important documents" are not only laws and regulations, but also the important information needed to make informed decisions together.

In order to discuss our common future together, and to enable reliable translations, the international language Esperanto would be very useful because of its simplicity, regularity and accuracy.

Contact us :

Kontakto (europokune.eu)

https://e-d-e.org/-Kontakti-EDE

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Introduction

This flash Eurobarometer investigates EU consumers' behaviour in the energy transition. It examines key themes, such as consumer trust in energy markets and providers, evaluation of energy services, and consumer protection measures. The survey explores consumers' understanding of energy bills, their consumption tracking habits, and factors influencing changes in energy use. It also delves into consumer preferences when selecting energy providers, switching behaviour, motivations for changing providers, and potential barriers to switching. Additionally, the study looks at information sources used by consumers when making decisions about energy providers, and areas for improvement in energy markets to better serve consumers.

On behalf of the European Commission, Directorate-General for Energy, Ipsos European Public Affairs interviewed a representative sample of EU citizens, aged 18 and over, in each of the 27 Member States of the European Union.

Between 30 June and 15 July 2025, 18 250 interviews were conducted over the telephone (landline and mobile phones). Survey data are weighted to known population proportions. The EU27 averages are weighted according to the size of the 18+ population of each EU Member State. A technical note on the methods applied to conduct the survey is appended as an annex to this report.

For the purposes of this report, the target group is limited to EU citizens, aged 18 and over, involved in making decisions about energy providers in their household (excluding those who indicate that the price of energy is set because it is included in their rent without the possibility to opt-out) (i.e. DX1_2 equal to 'Yes' and DX2 not equal to 'The price of energy is set because it is included in your rent without the possibility to opt out'). These energy decision-makers are referred to as respondents throughout the report.

Notes

- Due to the specific structure of their energy markets, some questions were not applicable and therefore not asked in Cyprus and Malta.
- It also is important to consider that, in some countries, energy prices remain fully or partly regulated. For instance, switching behaviour in the Netherlands, where the market is liberalised, might differ from Slovakia or Hungary, where household energy prices are regulated. This context is crucial for interpreting the results of this flash Eurobarometer.
- Survey results are subject to sampling tolerances meaning that not all apparent differences between countries and socio-demographic groups may be statistically significant. Thus, only differences that are statistically significant (at the 5% confidence level) – i.e. where it can be reasonably certain that they are unlikely to have occurred by chance – are highlighted in the text.
- The results of this flash Eurobarometer are presented both by country and in terms of socio-demographic characteristics.

  Although a review of various socio-demographics was undertaken, the discussion narrows down to those showing statistically significant differences, which are illustrated in the accompanying tables.
- Percentages may not add up to 100%, as they are rounded to the nearest percent. Response percentages exceed 100% if the question allowed respondents to select multiple responses. Due to rounding, percentages shown in the charts do not always exactly add up to the totals mentioned in the text.
- In this report, countries are referred to by their official abbreviation as indicated below.

BE	Belgium	FR	France	NL	Netherlands
BG	Bulgaria	HR	Croatia	AT	Austria
CZ	Czechia	IT	Italy	PL	Poland
DK	Denmark	CY	Rep. of Cyprus*	PT	Portugal
DE	Germany	LV	Latvia	RO	Romania
EE	Estonia	LT	Lithuania	SI	Slovenia
IE	Ireland	LU	Luxembourg	SK	Slovakia
EL	Greece	HU	Hungary	FI	Finland
ES	Spain	MT	Malta	SE	Sweden

* Cyprus as a whole is one of the 27 EU Member States. For practical reasons, interviews are only carried out in the part of the country controlled by the government of the Republic of Cyprus.

Main findings

Consumer perceptions and market evaluation

- More than a third (35%) of respondents who make decisions related to energy in their household say they do not trust the market in their country to provide fair prices and reliable service. In contrast, 63% trust their country's energy market. In total, 79% of respondents trust their electricity (and gas) provider(s) to provide fair prices and reliable service.
- About one in six respondents (17%) disagree that it is easy to get in contact with their energy provider when they need assistance or information. A higher share (22%) disagree that their energy bills are easy to understand. One in four respondents (25%) disagree that their energy provider provides easy-to-understand information about offers and promotions. About one in five (20%) disagree that their energy provider is investing sufficiently in renewable energy sources.

Consumer protection

- About one in three respondents (32%) disagree with the view that energy consumers in their country are well protected (for instance, against unfair practices or disconnection).
- Just over eight in ten respondents (82%) agree that they would trust an energy provider more if they committed to an officially certified code of practice on consumer rights.
- Nearly four in ten respondents (38%) disagree with the statement that 'if you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance'.
- Respondents were asked about areas that, in their opinion, need improvement to make the energy market in their country work better for consumers. The highest-ranking area for improvement in the energy market, selected by 38% of respondents, is better protection of vulnerable consumers and those in energy poverty. This is closely followed by more clarity and transparency of energy bills (34%), and more prevention of unfair commercial practices (e.g. telemarketing) (34%).

Energy consumption and billing practices

- Asked about the parts of their electricity (and gas) bills they find most difficult to understand, 36% of respondents report a difficulty understanding taxes and charges for maintaining the energy infrastructure. About one in six respondents each cite the cost for each unit of energy they consume (16%), the calculation of the total amount to be paid (16%), and the contract duration, early termination fees, and what happens when the contract period ends (16%).
- Respondents were also asked about the frequency of tracking their energy consumption, both for electricity and gas. Just over half of respondents (52%) report tracking their electricity consumption at least once a month or more frequently. Just under half of respondents (45%) who are connected to the natural gas grid indicate tracking their gas consumption at least once a month or more frequently.
- Respondents were asked about their motivations for changing their energy consumption behaviour at home. The survey proposed three specific behaviour changes: lowering heating or air conditioning use, running appliances like washing machines and dishwashers during off-peak hours, and using smart devices to automatically schedule appliance use during off-peak hours. Among those open to change, only or mainly economic reasons emerge as the primary motivator for all three listed changes, with 59% to 65% of respondents citing these reasons. Nevertheless, a proportion ranging from 20% to 24% cite mainly or only environmental reasons as their motivation across the different behaviours.

Provider selection and switching behaviour

- Respondents were then asked about important factors (beside price) when selecting an energy provider. Quality of service ranks first, selected by over one-third of those who switched (36%) and more than half of those who did not switch (52%). Reputation of the provider follows, selected by at least one-third of respondents in both groups (34% for switchers, 38% for non-switchers).
- Fewer than four in ten (38%) respondents indicate having switched their electricity provider within the last three years, whereas over a third (36%) have not switched for more than a decade, or have never switched at all. One-third of respondents (33%) connected to the natural gas grid indicate having switched gas providers within the last three years, compared to 38% who have not switched for more than a decade, or have never switched at all.
- Respondents who switched energy providers within the last three years were asked about the primary reasons for their most recent decision. More than two-thirds (68%) of respondents indicate they switched because they found an offer with a better price. Other reasons for switching are reported by smaller shares of respondents: moving house (18%); recommendations from family, friends or colleagues (13%); wanting a more environmentally-friendly energy provider (11%); having experienced billing problems (10%); poor customer service (8%); having been contacted by another energy provider (7%); to benefit from extra services another energy provider provides, like offering home insulation or other energy efficiency measures (5%).
- Respondents who did not switch energy providers in the last three years were asked about the main reasons that stopped them from switching. Just over half (52%) of this group indicate they did not because they are satisfied with the reliability, service and price of their current energy provider. About one in four (26%) respondents reply they do not think there is any difference between energy providers to make switching worthwhile.
- Respondents, regardless of whether they had switched energy providers within the last three years, were asked about their main information sources for switching decisions - either decisions already made or potential future choices. For recent switchers, energy providers' websites and price comparison websites are cited as common information sources by 34% of respondents. For non-switchers, in-person recommendations from friends, family, or colleagues emerge as the primary source of information (46% vs 25% of switchers), followed by price comparison websites (34%) and energy providers' websites (33%).

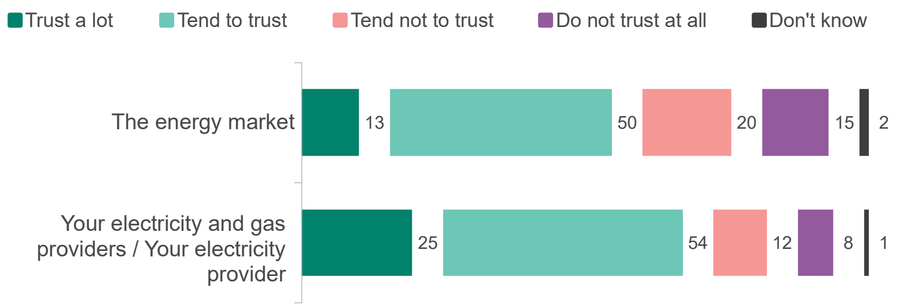
1. Consumer perceptions and market evaluation

1.1. Trust in the energy market and energy providers

More than one third (35%) of respondents who make decisions related to energy in their household do not trust their country's energy market to provide fair prices and reliable service. In contrast, 63% trust their country's energy market.

About eight in ten (79%) energy decision- makers trust their electricity (and gas) provider(s) to provide fair prices and reliable service. On the other hand, two in ten (20%) respondents do not trust their provider(s).

Q1 How much do you trust the following to provide fair prices and reliable service?



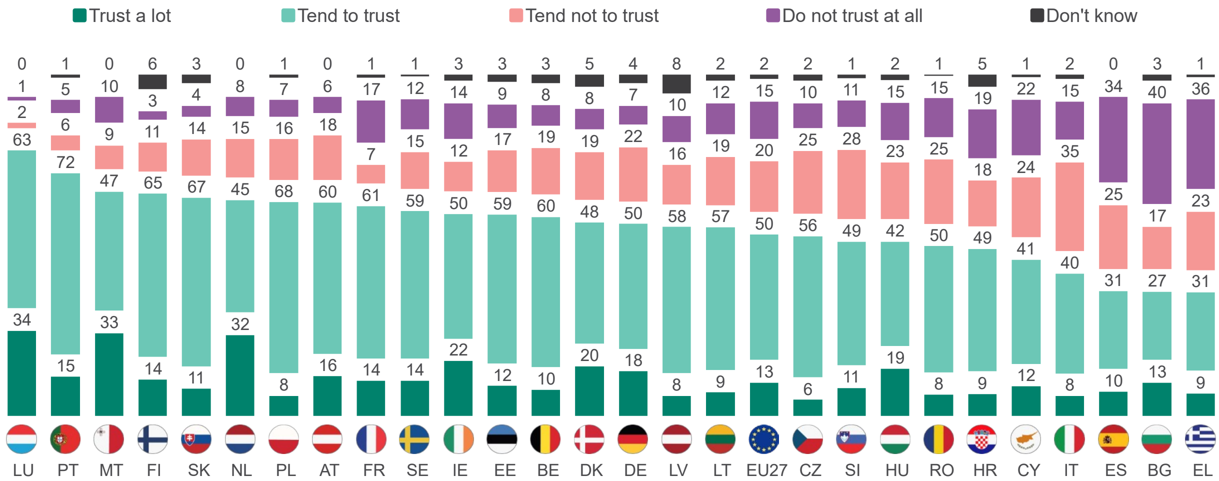
(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Country differences

The individual country results show that, among energy decision-makers, at least half of respondents in almost all Member States trust their country's energy market to provide fair prices and reliable service, the exceptions being Greece (40%), Bulgaria (40%), Spain (41%) and Italy (48%). The highest levels of trust are observed in Portugal (88%) and Luxembourg (97%)[1].

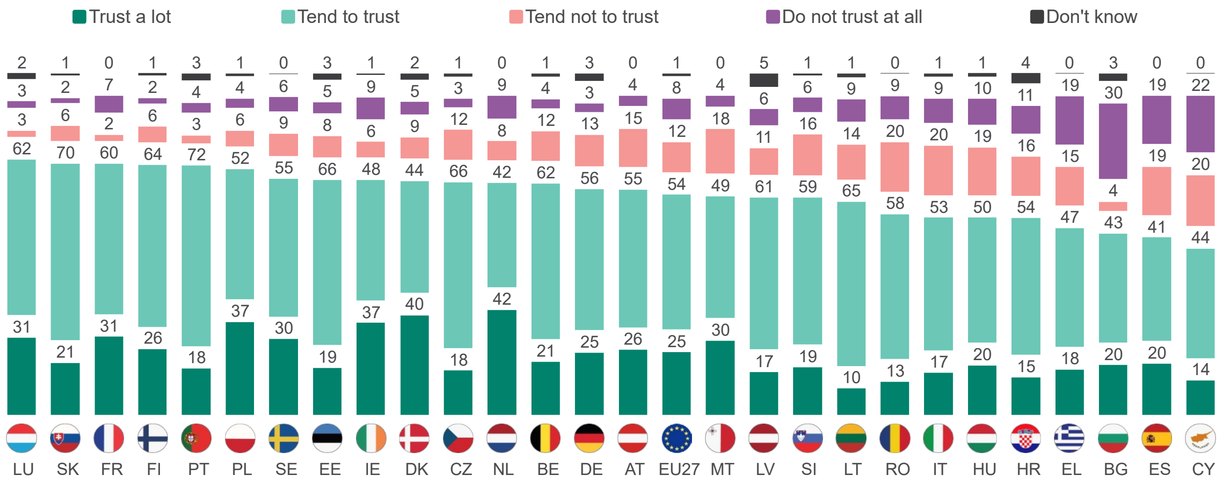
Majorities of respondents in all countries trust their electricity (and gas) provider(s) to provide fair prices and reliable service, though the relative size of this majority varies widely by country. At least nine in ten respondents trust their electricity (and gas) provider(s) in Luxembourg (93%), Slovakia (91%), France (91%), Finland (90%) and Portugal (90%). On the other hand, fewer than two-thirds of respondents share this view in Cyprus (57%), Spain (62%), Bulgaria (63%) and Greece (65%).

Q1₁ How much do you trust the following to provide fair prices and reliable service?
The energy market



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q1_2 How much do you trust the following to provide fair prices and reliable service?
Your electricity and gas providers/Your electricity provider



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

1 Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

Socio-demographic considerations

Respondents aged 18-24 are somewhat more likely than older respondents to trust their country's energy market (69% vs 63% of those aged 40-54 and 62% of those aged 55+).

Self-employed respondents (74%) are less likely than all other occupation groups (79%-84%) to trust their electricity (and gas) provider(s).

Housing status also plays a role in the levels of trust in energy providers. Owners of apartments (76%) are somewhat less likely than those renting an apartment or house (80%-82%) to trust their providers.

Respondents who can always afford paying their energy bills (64%) are more likely than those worrying about being able to pay their energy bills (58%) to trust their country's energy market.

Q1 How much do you trust the following to provide fair prices and reliable service? % Total 'Trust'

	The energy market	Your electricity and gas providers/Your electricity provider
EU27	63	79
Age		
18-24	69	80
25-39	64	79
40-54	63	78
55+	62	79
Employment status		
Self-employed	62	74
Employee	65	79
Manual worker	64	84
Not working	62	79
Housing status		
Renting a single-family home	64	82
Renting an apartment	67	80
Owning a single-family home	64	79
Owing an apartment	60	76
Financial situation		
You can always afford paying your energy bills	64	79
You worry about being able to pay your energy bills but usually manage to do so	58	76
You sometimes cannot pay your energy bills on time	64	78
You often cannot pay your energy bills on time	52	73

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

1.2. Evaluation of energy services

Although over three-quarters (78%) of energy decision-makers, or respondents, agree that it is easy to get in contact with their energy provider when they need assistance or information, about one in six (17%) consider this not easy.

More than two in ten respondents disagree (22%) that their energy bills are easy to understand[2]. Just over three-quarters (77%) agree with this statement.

A quarter of respondents (25%) disagree that their energy provider provides easy-to- understand information about offers and promotions. About seven in ten respondents (71%) agree with this statement.

About one in five respondents (21%) disagree that their energy provider is investing sufficiently in renewable energy sources. In contrast, about two-thirds (66%) agree with this statement. More than one in ten respondents (13%) do not know whether their energy provider is investing sufficiently in renewable energy sources.

Country differences

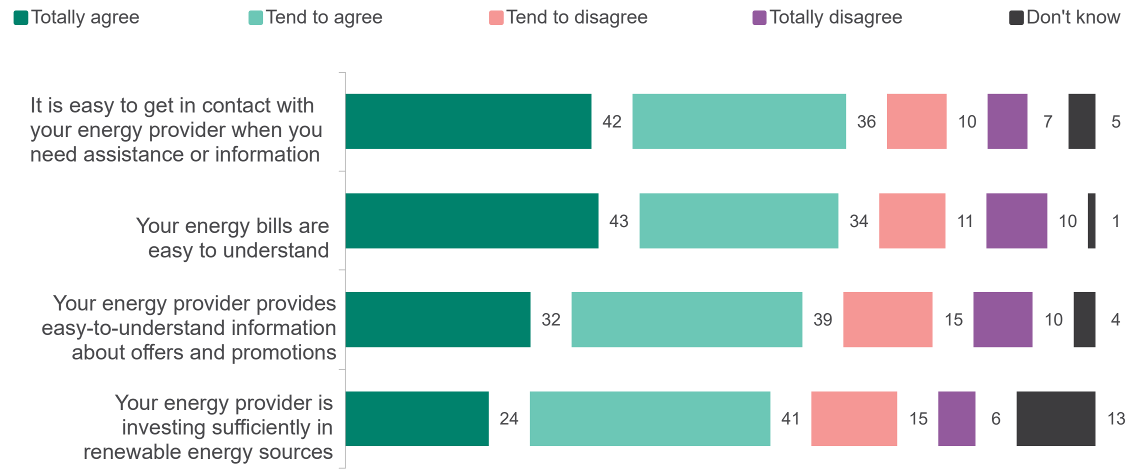
Fewer than two-thirds of respondents in Cyprus (54%), Croatia (62%) and Hungary (63%) agree that it is easy to get in contact with their energy provider when they need assistance or information. On the other hand, about nine in ten respondents in Czechia (89%) and Slovakia (89%) share this view.

No more than six in ten respondents in Cyprus (58%), Poland (59%) and Hungary (60%) agree that their energy bills are easy to understand. In contrast, more than nine in ten respondents in Luxembourg (95%), France (93%) and Finland (91%) agree with this statement.

Respondents in Bulgaria (39%), Cyprus (45%), followed by those in Spain (54%) and Hungary (55%), are the least likely to agree that their energy provider provides easy-to- understand information about offers and promotions. In Luxembourg, on the other hand, nearly nine in ten respondents (88%) agree with the view.

The smallest shares of respondents agreeing that their energy provider is investing sufficiently in renewable energy sources are observed in Cyprus (30%), Hungary (38%), Bulgaria (40%), Croatia (42%) and Latvia (43%). The largest shares, in turn, are again found in Luxembourg (86%) and France (82%).

Q2 How much do you agree or disagree with the following statements about your electricity and gasproviders / your electricity provider?



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

2 Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

Q2 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider? % Total 'Agree'

	It is easy to get in contact with your energy provider when you need assistance or information	Your energy bills are easy to understand	Your energy provider provides easy-to-understand information about offers and promotions	Your energy provider is investing sufficiently in renewable energy sources
EU27	78	77	71	66
BE	76	78	65	64
BG	68	68	39	40
CZ	89	82	81	50
DK	68	72	64	50
DE	82	86	78	65
EE	75	84	65	50
IE	88	87	82	72
EL	79	68	69	56
ES	68	63	54	62
FR	85	93	79	82
HR	62	70	65	42
IT	77	76	68	67
CY	54	58	45	30
LV	79	88	71	43
LT	76	86	77	63
LU	87	95	88	86
HU	63	60	55	38
MT	69	84	62	65
NL	87	76	80	77
AT	85	74	72	79
PL	76	59	66	54
PT	83	83	83	79
RO	69	73	76	61
SI	83	80	74	55
SK	89	86	80	61
FI	82	91	80	74
SE	83	86	79	70

Note: The higher the share agreeing with the statement, the darker green the cell.

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Socio-demographic considerations

The youngest respondents (aged 18-24) are more likely than older groups to agree with some of the statements on energy services: namely, that their energy provider provides easy-to- understand information about offers and promotions (76%, in total, agree vs 70%-71% of older groups) and that their energy provider is investing sufficiently in renewable energy sources (71% vs 64% of those aged 25-39 or aged 40-54).

Self-employed respondents are less likely than employees to agree that their energy provider provides easy-to-understand information about offers and promotions (67% vs 73%).

Respondents who rent their housing accommodation or their appartement (81%) are more likely than those owning an apartment (73%) or a single-family home (77%) to agree that their energy bills are easy to understand.

Financial situation also plays a role in the evaluation of energy services. Those respondents who are sometimes (70%) or often (65%) unable to pay their energy bills are less likely than those who can always or usually pay their bills (75%-78%) to agree that their energy bills are easy to understand. These groups (58% and 51% respectively) are also less likely than those in a better financial situation (66%) to agree that their energy provider is investing sufficiently in renewable energy sources.

Q2 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?
% Total 'Agree'

	It is easy to get in contact with your energy provider when you need assistance or information	Your energy bills are easy to understand	Your energy provider provides easy-to-understand information about offers and promotions	Your energy provider is investing sufficiently in renewable energy sources
EU27	78	77	71	66
Age				
18-24	76	79	76	71
25-39	78	77	70	64
40-54	78	77	71	64
55+	79	77	71	66
Employment status				
Self-employed	77	76	67	63
Employee	79	78	73	66
Manual worker	77	78	71	66
Not working	79	77	70	66
Housing status				
Renting a single-family home	77	81	72	71
Renting an apartment	81	81	73	67
Owning a single-family home	78	77	72	65
Owing an apartment	78	73	69	64
Financial situation				
You can always afford paying your energy bills	79	78	72	66
You worry about being able to pay your energy bills but usually manage to do so	76	75	69	66
You sometimes cannot pay your energy bills on time	78	70	63	58
You often cannot pay your energy bills on time	78	65	73	51

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

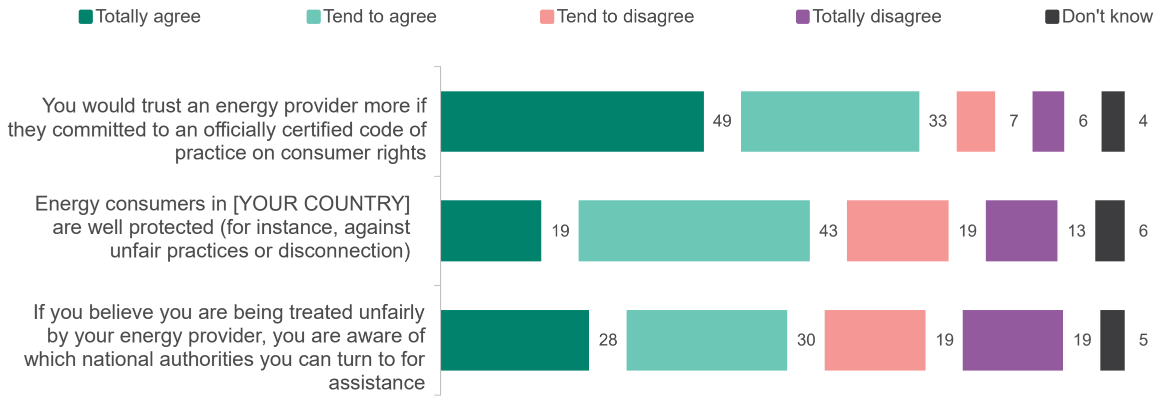
1.3. Consumer protection in the energy sector

About one-third (32%) of energy decision-makers, or respondents, disagree with the view that energy consumers in their country are well protected (for instance, against unfair practices or disconnection). Just over six in ten (62%) respondents agree with the statement.

Nearly four in ten respondents (38%) disagree with the statement that 'if you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance'. Just under six in ten (58%) respondents, on the other hand, agree with this statement.

Just over eight in ten (82%) respondents agree that they would trust an energy provider more if they committed to an officially certified code of practice on consumer rights. Over one in ten respondents (13%) disagree with this view.

Q3 How much do you agree or disagree with the following statements about your electricity and gasproviders / your electricity provider?



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

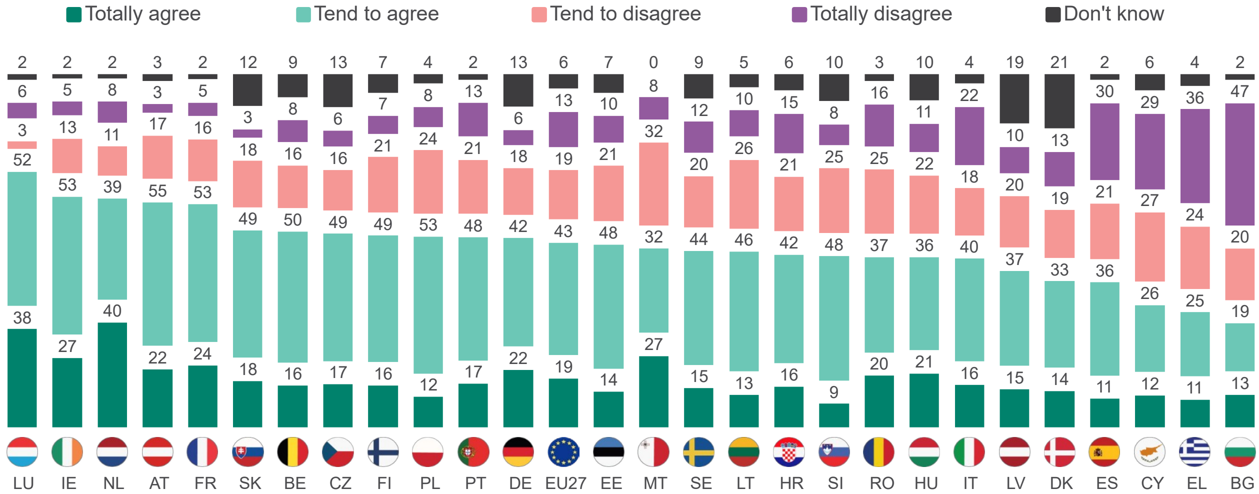
Country differences

Across the Member States, wide variation is observed in the proportion of respondents agreeing that energy consumers in their country are well protected (for instance, against unfair practices or disconnection).

Fewer than four in ten respondents agree with this statement in Bulgaria (31%), Greece (35%) and Cyprus (38%). On the other hand, about nine in ten respondents in Luxembourg agree with this view. Other countries with a high level of agreement include Ireland (80%), the Netherlands (79%), Austria (78%) and France (77%). [3]

Q3_1 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

Energy consumers in [YOUR COUNTRY] are well protected (for instance, against unfair practices or disconnection)



	LU	IE	NL	AT	FR	SK	BE	CZ	FI	PL	PT	DE	EU27	EE	MT	SE	LT	HR	SI	RO	HU	IT	LV	DK	ES	CY	EL	BG
Don't know	2	2	2	3	2	12	9	13	7	4	2	13	6	7	0	9	5	6	10	3	10	4	19	21	2	6	4	2
Totally disagree	6	5	8	3	5	3	8	6	7	8	13	6	13	10	8	12	10	15	8	16	11	22	10	13	30	29	36	47
Tend to disagree	3	13	11	17	16	18	16	16	21	24	21	18	19	21	32	20	26	21	25	25	22	18	20	19	21	27	24	20
Tend to agree	52	53	39	55	53	49	50	49	49	53	48	42	43	48	32	44	46	42	48	37	36	40	37	33	36	26	25	19
Totally agree	38	27	40	22	24	18	16	17	16	12	17	22	19	14	27	15	13	16	9	20	21	16	15	14	11	12	11	13

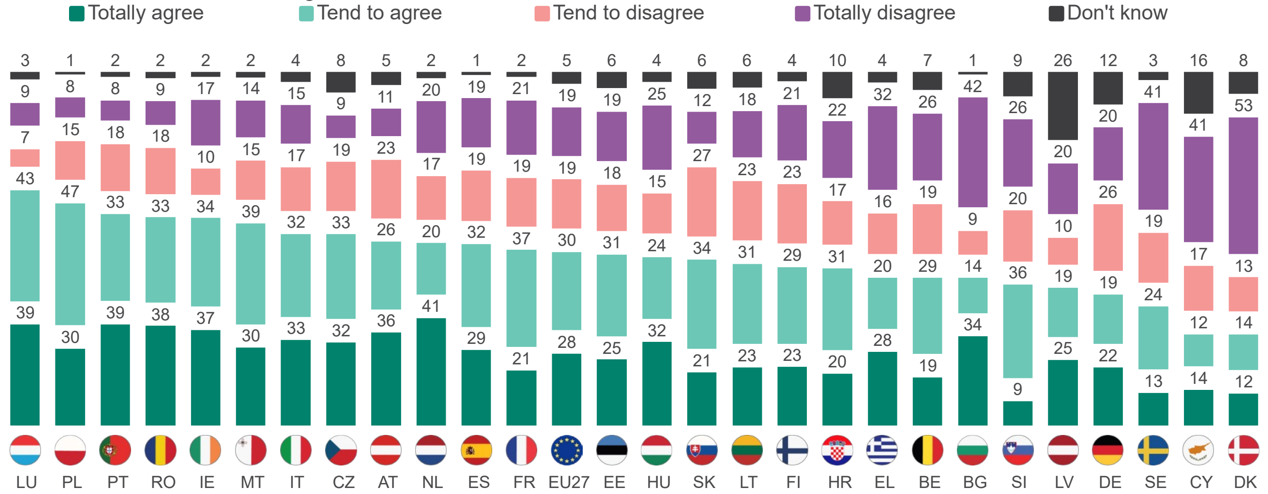
(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

3 Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

In Denmark (26%) and Cyprus (26%), just over one in four respondents agree that ‘if you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance’. In contrast, just over eight in ten (82%) respondents in Luxembourg share this view. The share agreeing with this statement is also high in Poland (76%), followed by Portugal (72%), Romania (71%) and Ireland (71%).

Q3_2 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

If you believe you are being treated unfairly by your energy provider,you are aware of which national authorities you can turn to for assistance

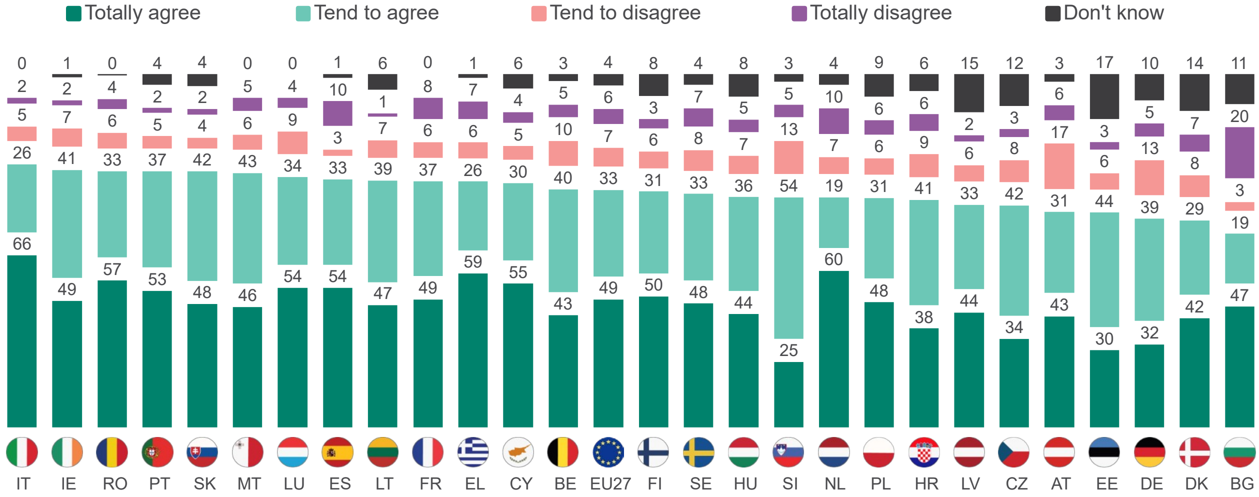


(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

At least two-thirds of respondents in all Member States agree that they would trust an energy provider more if they committed to an officially certified code of practice on consumer rights. The smallest shares agreeing with this statement are found in Bulgaria (66%), Denmark (71%) and Germany (72%), whereas the largest share is observed in Italy (92%).

Q3_3 How much do you agree or disagree with the following statements about your electricity and gas providers / your electricity provider?

You would trust an energy provider more if they committed to an officially certified code of practice on consumer rights



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Socio-demographic considerations

Respondents aged 18-24 (67%) are more likely than those aged 40-54 (61%) or aged 55+ (62%) to agree that energy consumers in their country are well protected (for instance, against unfair practices or disconnection).

Housing status also influences perceptions of consumer protection in the energy sector. Owners of apartments are more likely than those renting to agree with the following statements: ‘if you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance’ (61% vs 54%-55% of those renting) and ‘you would trust an energy provider more if they committed to an officially certified code of practice on consumer right’ (85% vs 80% of those renting a single-family home). Owners of apartments are, in contrast, the least likely to agree that energy consumers in their country are well protected (for instance, against unfair practices or disconnection) (59% vs 62%-69% of other groups).

Relating to respondents’ financial situation, those who can always afford paying energy bills are more likely to agree that consumers in the country are well protected, compared to those who worry about their ability to pay bills but usually manage to do so (64% vs 55%). Additionally, those who worry but usually manage to pay (53%) are less likely than those who can always afford paying energy bills (58%) and those who sometimes cannot pay (65%) to agree with the statement ‘if you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance’.

Q3 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider? % Total 'Agree'

	You would trust an energy provider more if they committed to an officially certified code of practice on consumer rights	Energy consumers in [YOUR COUNTRY] are well protected (for instance, against unfair practices or disconnection)	If you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance
EU27	82	62	58
Age			
18-24	86	67	62
25-39	82	63	56
40-54	82	61	58
55+	82	62	57
Housing status			
Renting a single-family home	80	69	54
Renting an apartment	83	63	55
Owning a single-family home	82	62	58
Owing an apartment	85	59	61
Financial situation			
You can always afford paying your energy bills	82	64	58
You worry about being able to pay your energy bills but usually manage to do so	85	55	53
You sometimes cannot pay your energy bills on time	80	60	65
You often cannot pay your energy bills on time	83	59	61

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

1.4. Areas for improvement in the energy market

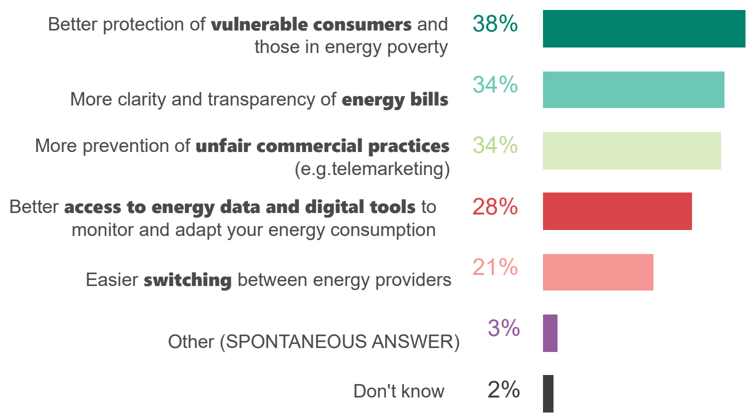
Energy decision-makers were asked about areas that, in their opinion, need improvement to make the energy market in their country work better for consumers. They were asked to provide up to two responses. Note that the option 'easier switching between energy providers' was not included for Cyprus and Malta due to the specific structure of their energy markets.

The highest-ranking area for improvement in the energy market, selected by 38% of respondents, is better protection of vulnerable consumers and those in energy poverty. This is closely followed by more clarity and transparency of energy bills (34%), and more prevention of unfair commercial practices (e.g. telemarketing) (34%), each selected by about one-third of respondents.

Just under three in ten respondents (28%) indicate better access to energy data and digital tools to monitor and adapt their energy consumption as an area most in need of improvement.

About two in ten (21%) respondents report that easier switching between energy providers is one of the areas most in need of improvement to make their country's energy market work better for consumers.

Q4 To make the energy market in [YOUR COUNTRY] work better for consumers, which of the following areas most need improvement? You can give up to two responses. [MULTIPLE ANSWERS]



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Country differences

Across the Member States, there is wide variation in the most frequently mentioned area for improvement in the energy market.

In 15 Member States, better protection of vulnerable consumers and those in energy poverty ranks first as area for improvement. The largest share of respondents selecting this area are found in Cyprus (71%), followed (at a distance) by Romania (55%), Finland (52%), Greece (51%) and the Netherlands (50%). In contrast, about one in four respondents share this view in Lithuania (24%).

In six Member States, more clarity and transparency of energy bills is the top- ranking area for improvement in the energy market: Portugal (45%), Hungary (43%), Germany (41%), Poland (39%), Denmark (39%) and Austria (37%). More than four in ten respondents also mention this area in Cyprus (49%), Romania (48%), Greece (46%) and Belgium (41%). About two in ten respondents, on the other hand, select this response in Latvia (19%), Finland (20%) and France (21%).

In Slovenia (40%), Lithuania (39%), France (38%) and Bulgaria (36%), more prevention of unfair commercial practices (e.g. telemarketing) ranks first in the list of areas for improvement in the energy market. This area is also commonly mentioned in Greece (44%), Belgium (42%) and Slovakia (42%). By comparison, one in six (17%) respondents indicate this in Luxembourg.

Malta (48%) is the only Member State where respondents most commonly report that better access to energy data and digital tools to monitor and adapt their energy consumption would need to be prioritised to make their country’s energy market work better for consumers. In contrast, fewer than one in ten respondents in Bulgaria (7%) and the Netherlands (8%) share this view.

Easier switching between energy providers is found to be most commonly mentioned in Ireland (36%). At least three in ten respondents also select this area in Lithuania (35%) and Luxembourg (30%). In Denmark, on the other hand, one in ten (10%) respondents point to this area.

Q4 To make the energy market in [YOUR COUNTRY] work better for consumers, which of the following areas most need improvement? You can give up to two responses. [MULTIPLE ANSWERS]

	Better protection of vulnerable consumers and those in energy poverty	More clarity and transparency of energy bills	More prevention of unfair commercial practices (e.g. telemarketing)	Better access to energy data and digital tools to monitor and adapt your energy consumption	Easier switching between energy providers	Other (SPONTANEOUS ANSWER)	Don’t know
EU27	38	34	34	28	21	3	2
BE	48	41	42	29	21	2	2
BG	27	24	36	7	22	9	2
CZ	47	30	37	28	19	5	4
DK	33	39	37	27	10	4	6
DE	27	41	25	35	22	6	5
EE	42	30	21	18	28	8	8
IE	27	26	22	32	36	2	3
EL	51	46	44	24	12	3	0
ES	42	32	37	33	15	2	0
FR	36	21	38	30	25	2	2
HR	43	30	29	28	19	3	5
IT	44	35	38	21	20	2	1
CY	71	49	24	41	-	0	0
LV	37	19	28	26	17	4	8
LT	24	23	39	34	35	1	4
LU	38	27	17	32	30	2	0
HU	38	43	30	25	21	3	5
MT	38	36	25	48	-	4	1
NL	50	34	38	8	16	1	0
AT	35	37	24	26	19	7	3
PL	27	39	29	29	24	1	0
PT	39	45	22	35	14	1	2
RO	55	48	27	31	25	1	0
SI	34	27	40	30	19	2	3
SK	49	26	42	35	21	2	2
FI	52	20	34	21	25	3	5
SE	37	26	33	32	24	4	3

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each country is shown in dark green and white font.

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Socio-demographic considerations

Respondents aged 18-24 (32%) or aged 25-39 (31%) are more likely than older ones (26%- 28%) to report that better access to energy data and digital tools to monitor and adapt their energy consumption would need to be prioritised to make their country's energy market work better for consumers.

Owners of apartments (36%) are more likely than those renting apartments (31%) to report that more prevention of unfair commercial practices (e.g. telemarketing) is an area most in need of improvement.

Q4 To make the energy market in [YOUR COUNTRY] work better for consumers, which of the following areas most need improvement? You can give up to two responses. [MULTIPLE ANSWERS]

	Better protection of vulnerable consumers and those in energy poverty	More clarity and transparency of energy bills	More prevention of unfair commercial practices (e.g. telemarketing)	Better access to energy data and digital tools to monitor and adapt your energy consumption	Easier switching between energy providers	Other (SPONTANEOUS ANSWER)	Don't know
EU27	38	34	34	28	21	3	2
Age							
18-24	41	30	33	32	20	3	1
25-39	41	35	33	31	22	2	1
40-54	38	35	34	28	21	3	2
55+	36	34	34	26	20	3	3
Housing status							
Renting a single-family home	37	33	33	29	21	2	3
Renting an apartment	40	31	31	29	21	4	2
Owning a single-family home	37	35	33	28	20	3	2
Owing an apartment	40	35	36	27	21	2	1

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

2. Energy consumption and billing practices

2.1. Understanding energy bills

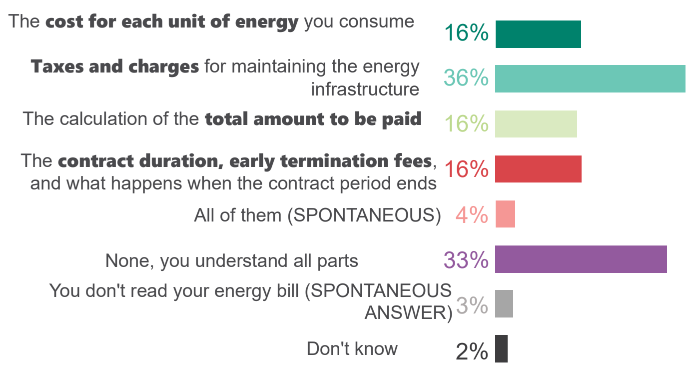
Asked about the parts of their electricity (and gas) bills they find most difficult to understand, over one-third (36%) of energy decision-makers, or respondents, report a difficulty in understanding taxes and charges for maintaining the energy infrastructure.

Three aspects of energy bills are each cited as most difficult to understand by one in six respondents. These are: the cost for each unit of energy they consume (16%), the calculation of the total amount to be paid (16%) and the contract duration, early termination fees, and what happens when the contract period ends (16%).

Four percent spontaneously mention all of these parts and 3% that they do not read their energy bills.

One-third of respondents (33%) indicate that they understand all parts of their energy bills.

Q6 Which parts of your electricity and gas bills/your electricity bills, if any, do you find most difficult to understand? You can give up to two responses. [MULTIPLE ANSWERS]



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Country differences

Across all but three Member States, taxes and charges for maintaining the energy infrastructure rank first in difficulty when respondents are asked about the parts of their electricity (and gas) bills they find most difficult to understand. The largest shares of respondents indicating this are found in Italy (50%), Cyprus (46%) and Greece (46%). The smallest shares are observed in Malta (12%), Ireland (16%) and Bulgaria (17%).

In Malta (24%), respondents most frequently mention the cost for each unit of energy consumed (jointly with the calculation of the total amount to be paid). About one in four respondents also report this in Belgium (26%), Cyprus (25%) and Romania (25%). Fewer than one in ten respondents, on the other hand, share this view in Bulgaria (6%), Latvia (6%), Finland (6%), Estonia (9%) and Lithuania (9%).

The calculation of the total amount to be paid ranks first as of one of the most difficult parts of energy bills to understand in Romania (43%). In contrast, 5% of respondents in Latvia and 7% in Finland struggle with this. The contract duration, early termination fees, and what happens when the contract period ends rank first in difficulty in Ireland (21%). More than one in five respondents also report to be struggling to understand this part of energy bills in Romania (21%), Belgium (22%), Spain (26%) and Italy (27%). Four percent of respondents in Latvia, on the other hand, share this view.

Bulgaria (17%) stands out as the only country where the response option ‘all of them’ ranks first (jointly with taxes and charges for maintaining the energy infrastructure), when asked about which parts of energy bills are most difficult to understand. This response is also given by 12% of respondents in Poland.

In two Member States, Finland (58%) and Latvia (54%), a majority of respondents indicate they find none of these parts of bills difficult to understand, and that they understand all parts. In contrast, fewer than two in ten (18%) respondents in Italy hold this opinion.

A proportion of respondents ranging from 0% in Luxembourg to 11% in Poland report they do not read their energy bills.

Q6 Which parts of your electricity and gas bills/ your electricity bills, if any, do you find most difficult to understand? You can give up to two responses. [MULTIPLE ANSWERS]

	The cost for each unit of energy you consume	Taxes and charges for maintaining the energy infrastructure	The calculation of the total amount to be paid	The contract duration, early termination fees, and what happens when the contract period ends	All of them (SPONTANEOUS ANSWER)	None, you understand all parts	You don't read your energy bill (SPONTANEOUS ANSWER)	Don’t know
EU27	16	36	16	16	4	33	3	2
BE	26	40	18	22	2	27	3	1
BG	6	17	16	7	17	35	10	0
CZ	17	36	16	15	2	37	2	2
DK	15	34	19	10	4	30	7	2
DE	19	30	16	13	3	37	2	5
EE	9	37	11	11	3	41	4	3
IE	12	16	16	21	5	41	6	4
EL	19	46	18	14	2	30	1	0
ES	15	31	16	26	4	32	1	3
FR	11	37	10	12	2	42	4	3
HR	15	30	18	9	3	38	4	3
IT	19	50	12	27	2	18	2	1
CY	25	46	21	10	3	28	5	1
LV	6	23	5	4	1	54	8	2
LT	9	25	16	16	1	48	2	2
LU	11	22	18	14	1	43	0	3
HU	18	38	21	5	5	34	4	1
MT	24	12	24	13	2	40	2	1
NL	10	34	20	15	2	37	2	2
AT	13	29	18	19	3	37	3	5
PL	18	38	10	9	12	28	11	0
PT	18	41	19	13	2	30	5	0
RO	25	41	43	21	1	26	1	1
SI	15	35	11	9	2	38	7	1
SK	22	30	23	12	0	40	4	1
FI	6	22	7	12	2	58	2	2
SE	14	41	10	16	1	39	1	1

Note: The higher the share of respondents selecting a response, the darker green/red the cell. The highest-ranking response for each country is shown in dark green and white font.

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Socio-demographic considerations

Respondents who are renting a single-family home are more likely than owners of a house or apartment to struggle understanding the cost for each unit of energy consumed (21% vs 16% of other groups). On the other hand, those who own an apartment are most likely to have difficulties with taxes and charges for maintaining the energy infrastructure (42% vs 34% of other groups) and least likely to report they understand all parts (28% vs 33%-36% of other groups).

Financial situation also affects the perceived difficulty of understanding energy bills.

Respondents who can always afford paying their energy bills are more likely than those who usually manage to pay, or those who sometimes cannot pay their energy bills on time to mention they understand all parts of energy bills (34% vs 29% and 25% respectively).

Q6 Which parts of your electricity and gas bills/ your electricity bills, if any, do you find most difficult to understand? You can give up to two responses. [MULTIPLE ANSWERS]

	The cost for each unit of energy you consume	Taxes and charges for maintaining the energy infrastructure	The calculation of the total amount to be paid	The contract duration, early termination fees, and what happens when the contract period ends	All of them (SPONTANEOUS ANSWER)	None, you understand all parts	You don't read your energy bill (SPONTANEOUS ANSWER)	Don't know
EU27	16	36	16	16	33	4	3	2
Housing status								
Renting a single-family home	21	34	13	15	33	3	3	4
Renting an apartment	16	34	14	16	34	3	3	3
Owning a single-family home	16	34	16	15	36	4	3	2
Owing an apartment	16	42	16	19	28	4	4	1
Financial situation								
You can always afford paying your energy bills	15	36	15	16	34	3	3	2
You worry about being able to pay your energy bills but usually manage to do so	19	39	16	18	29	4	3	1
You sometimes cannot pay your energy bills on time	22	38	15	15	25	6	8	2
You often cannot pay your energy bills on time	27	49	25	18	27	2	1	0

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

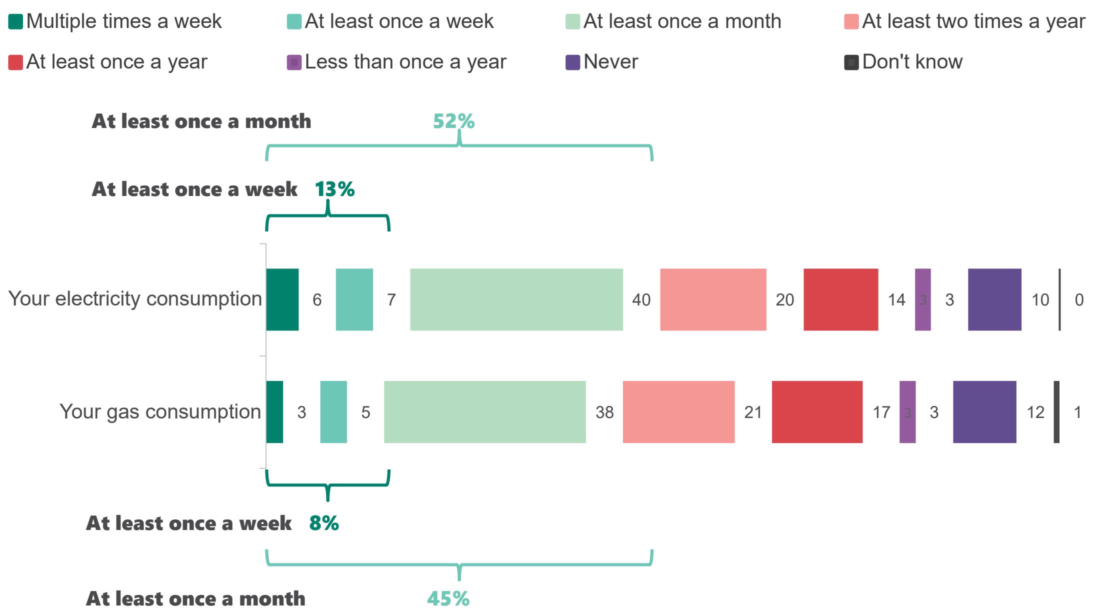
2.2. Tracking energy consumption

Energy decision-makers were also asked about the frequency of tracking their energy consumption, both for electricity and gas.

Just over half of respondents (52%) report tracking their electricity consumption at least once a month or more frequently. One- third of respondents mention tracking their electricity consumption ‘at least two times a year’ (20%) or ‘at least once a year’ (14%). Just over one in ten respondents indicate tracking their electricity consumption ‘less than once a year’ (3%) or ‘never’ (10%).

Just under half of respondents (45%) who are connected to the natural gas grid indicate tracking their gas consumption at least once a month or more frequently.[4] More than one-third of respondents track their gas consumption ‘at least two times a year’ (21%) or ‘at least once a year’ (17%). On the other hand, about one in seven respondents mention to be tracking this ‘less than once a year’ (3%) or ‘never’ (12%).

Q5 How often do you track your energy consumption? Specifically…



(%) Base:n=18 250 - Respondents involved in energy decisions in their household (electricity) & Base:n=7 720 – Respondents with a connection to the natural gas grid and involved in energy decisions in their household (gas)

4 Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

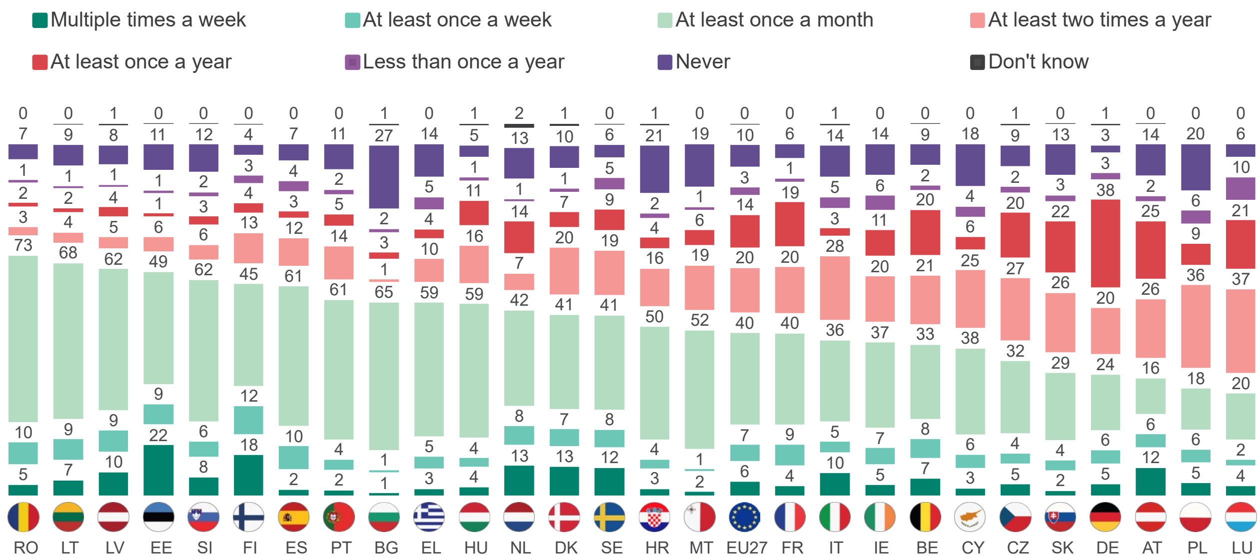
Country differences

The frequency of tracking electricity consumption varies widely across EU Member States. At least half of respondents in 18 Member States monitor their electricity consumption at least monthly, with Romania (87%), Lithuania (84%) and Latvia (81%) leading the way. In contrast, Luxembourg (27%) and Poland (29%) show the lowest frequency of monthly tracking.

Germany (58%), Luxembourg (58%) and Austria (51%) stand out for predominantly annual or biennial tracking, while this frequency is least common in Romania (5%), Lithuania (6%) and Estonia (8%).

The proportion of those tracking electricity consumption less often than annually or never ranges from 6% in Germany and Hungary, to 29% in Bulgaria.

Q5_1 How often do you track your energy consumption? Specifically… **your electricity consumption**



(%) Base:n=18 250 - Respondents involved in energy decisions in their household

Gas consumption tracking patterns reveal even greater disparities across the EU. In 13 Member States, at least half of respondents connected to the natural gas grid indicate tracking their gas consumption at least monthly. Romania leads with 82%, followed closely by Lithuania (77%) and Latvia (76%). In contrast, Sweden (14%), Austria (17%) and Finland (19%) show the lowest shares of respondents indicating a monthly tracking frequency.

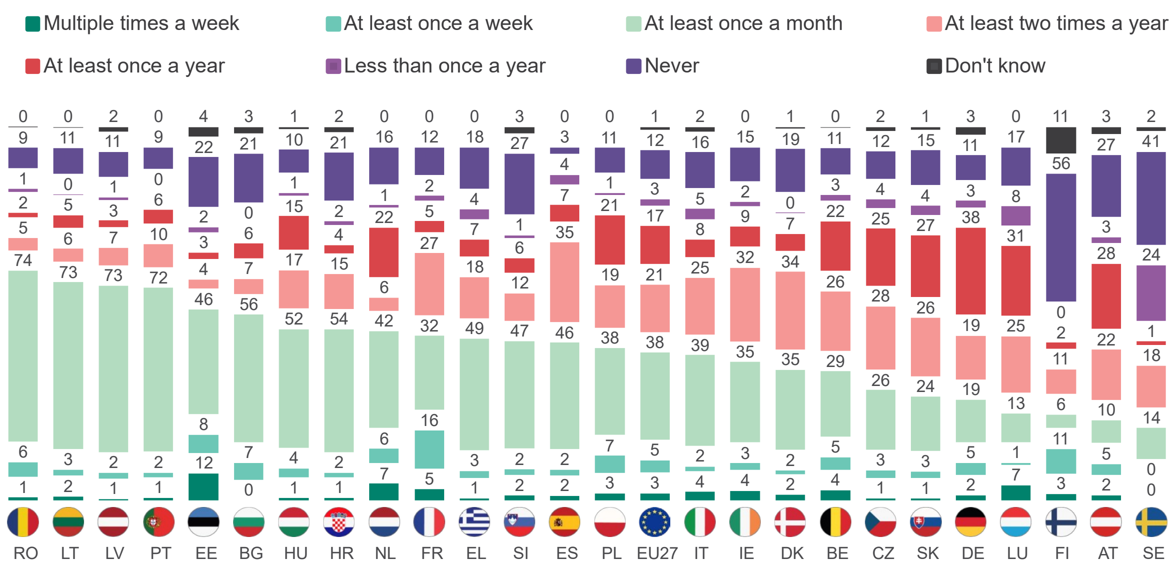
Annual or biennial tracking of gas consumption is most common in Germany (57%), Luxembourg (55%), Czechia (52%), Slovakia (52%) and Austria (50%). Conversely, 7% in both Estonia and Romania report this frequency.

Notably, majorities in Sweden (65%) and Finland (56%) track their gas consumption less often than annually or never, contrasting sharply with Spain (7%) and Portugal (9%).

Socio-demographic considerations

The frequency of energy consumption tracking shows little variation across different socio-demographic groups. Respondents who own their house or apartment are more likely than those renting it to track at least on a monthly basis their electricity consumption (55% vs 48%) and their gas consumption (48% vs 42%).

Q5_2 How often do you track your energy consumption? Specifically… **your gas consumption**



(%) Base:n=7 720 – Respondents with a connection to the natural gas grid and involved in energy decisions in their household

Note: question not asked in MT/CY

2.3. Factors influencing changes in energy consumption behaviour

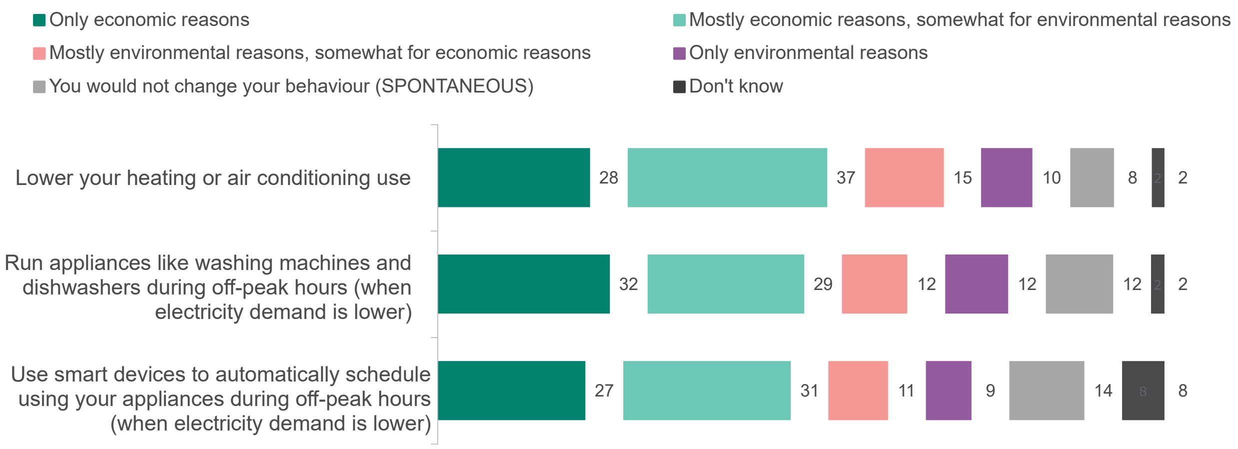
Energy decision-makers were also asked about their motivations for changing their energy consumption behaviour at home. The survey proposed three specific behaviour changes: lowering heating or air conditioning use, running appliances like washing machines and dishwashers during off-peak hours, and using smart devices to automatically schedule appliance use during off-peak hours.

For each of the three proposed energy consumption behaviour changes, small shares of respondents (ranging from 8% to 14%) report an unwillingness to change their habits at all. Among those open to change, only or mostly economic reasons emerge as the primary motivator for all three listed changes, with 59% to 65% of respondents citing economic reasons.[5]

Nevertheless, a proportion of respondents varying between 20% and 24% cite mainly or only environmental reasons as their motivation for the different behaviours.

Regarding the motivation to lower heating or air conditioning use, economic factors predominate. About two-thirds (65%) of respondents cite only or mainly economic reasons (28% 'only economic reasons' and 37% 'mostly economic reasons, somewhat for environmental reasons'). Environmental considerations are the primary motivator for nearly one-fourth of respondents (15% 'mostly environmental reasons, somewhat for economic reasons' and 10% 'only environmental reasons'). Fewer than one in ten (8%) respondents, on the other hand, indicate they would not change their behaviour in this regard.

Q11 What would motivate you to change your energy consumption behaviour at home in the following ways ?



(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

5 Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

When considering running appliances like washing machines and dishwashers during off-peak hours (when electricity demand is lower), economic motivations again lead. About six in ten (61%) respondents report only or mostly economic reasons for this potential change (32% ‘only economic reasons’ and 29% ‘mostly economic reasons, somewhat for environmental reasons’). Environmental factors are the main driver for 24% of respondents (12% ‘mostly environmental reasons, somewhat for economic reasons’ and 12% ‘only environmental reasons’). Just over one in ten (12%), in contrast, state they would not alter their behaviour in this way.

Regarding the use of smart devices to automatically schedule appliances during off-peak hours, the pattern remains similar. Economic reasons remain the primary factor influencing a behaviour change, cited by a majority of respondents (27% ‘only economic reasons’ and 31% ‘mostly economic reasons, somewhat for environmental reasons’). Environmental considerations are the main factor for one in five (20%) respondents (of which 11% say ‘mostly environmental reasons, somewhat for economic reasons’ and 9% ‘only environmental reasons’). A slightly larger group (14%) indicate they would not adopt this behaviour change.

Country differences

With the exception of Germany (44%), majorities in all Member States cite only or mostly economic reasons as their primary motivation to lower heating or air conditioning use. Poland leads with the highest percentage at 87%, followed by Cyprus (82%). While economic factors predominate across all Member States, environmental motivations play a significant role in Germany (39%) and Malta (38%). In Latvia, notably, more than two in ten respondents (22%) would not change their behaviour.

Regarding the motivation to run appliances like washing machines and dishwashers during off-peak hours, economic considerations remain the primary driver across most of the Member States. Only Germany (38%), Hungary (45%) and the Netherlands (46%) are exceptions, where fewer than half of respondents cite only or mostly economic reasons. Among countries with majorities prioritising economic reasons, Cyprus (80%) again leads, followed closely by France (76%) and Ireland (76%). Mainly or only environmental reasons, while secondary overall, again play an important role in motivating respondents in Malta (37%) and Germany (36%). Latvia is once again the country where the largest proportion of respondents (35%) would not change their behaviour.

Economic considerations are also the primary motivator for using smart devices to schedule using appliances during off-peak hours (when electricity demand is lower) in most Member States. Cyprus (78%) and France (75%) again lead with the largest shares of respondents citing only or mainly economic reasons. In contrast, Germany (37%), the Netherlands (41%), Hungary (43%), Latvia (47%) and Austria (47%) stand out as exceptions where fewer than half of respondents prioritise economic reasons. In Malta (34%), the Netherlands (34%) and Germany (30%), at least three in ten respondents indicate being motivated in changing this behaviour by only or mostly environmental reasons. Estonia (35%) and Latvia (37%) stand out as the countries where more than three in ten respondents would not change their behaviour.

Q11 What would motivate you to change your energy consumption behaviour at home in the following ways?

	Lower your heating or air conditioning use		Run appliances like washing machines and dishwashers during off-peak hours (when electricity demand is lower)		Use smart devices to automatically schedule using your appliances during off-peak hours (when electricity demand is lower)	
	Only or mostly economic reasons	Only or mostly environmental reasons	Only or mostly economic reasons	Only or mostly environmental reasons	Only or mostly economic reasons	Only or mostly environmental reasons
EU27	65	24	61	24	59	20
BE	64	27	67	22	61	20
BG	66	23	59	17	58	21
CZ	71	18	72	14	66	12
DK	62	28	63	21	54	19
DE	44	39	38	36	37	30
EE	78	8	70	6	50	6
IE	62	31	76	18	56	20
EL	76	19	71	21	68	20
ES	74	21	68	20	68	14
FR	69	14	76	19	75	10
HR	58	24	62	16	54	18
IT	63	30	63	27	61	25
CY	82	10	80	11	78	10
LV	62	11	53	7	47	7
LT	65	23	67	16	71	15
LU	60	34	68	28	65	26
HU	61	30	45	33	43	28
MT	57	38	56	37	57	34
NL	60	28	46	34	41	34
AT	55	32	54	22	47	19
PL	87	10	63	15	60	9
PT	73	19	66	21	65	20
RO	74	20	69	24	71	22
SI	58	24	62	15	56	13
SK	71	20	67	17	64	18
FI	69	18	65	12	53	11
SE	62	30	61	26	58	24

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Socio-demographic considerations

Respondents aged 25-39 (26%) are more likely to cite (only or mainly) environmental reasons for lowering heating or air conditioning use compared to those aged 18-24 or 40-54 (21% and 22% respectively). Conversely, respondents aged 18-24 are more likely to be economically motivated to use appliances during off-peak hours compared to those aged 25-39 and 55+ (67% vs 59% and 60% respectively).

Manual workers (71%) show a higher tendency to be economically motivated to reduce heating or air conditioning use compared to the self-employed (64%).

Apartment owners (70%) are more likely than those in other housing situations (62%-64%) to cite economic reasons for reducing heating or air conditioning use. They also show a higher propensity than other groups to be economically motivated to use smart devices for scheduling appliances during off-peak hours (62% vs 55%-58%).

Respondents who worry about their ability to pay bills are more likely than those who can always afford bill payments to be economically motivated for two energy-saving behaviours: running appliances during off-peak hours (70% vs 60%) and using smart devices for scheduling off-peak use of appliances (66% vs 58%).

Q11 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

	Lower your heating or air conditioning use		Run appliances like washing machines and dishwashers during off-peak hours (when electricity demand is lower)		Use smart devices to automatically schedule using your appliances during off-peak hours (when electricity demand is lower)	
	Only or mostly economic reasons	Only or mostly environmental reasons	Only or mostly economic reasons	Only or mostly environmental reasons	Only or mostly economic reasons	Only or mostly environmental reasons
EU27	65	24	61	24	59	20
Age						
18-24	68	21	67	24	61	21
25-39	65	26	59	27	60	21
40-54	68	22	63	22	60	19
55+	63	25	60	24	56	19
Employment status						
Self-employed	64	25	59	25	57	22
Employee	66	26	61	25	59	20
Manual worker	71	19	58	26	61	18
Not working	65	23	63	22	59	18
Housing status						
Renting a single-family home	62	23	62	21	56	20
Renting an apartment	64	25	60	26	55	23
Owning a single-family home	64	25	60	24	58	20
Owing an apartment	70	23	63	22	62	17
Financial situation						
You can always afford paying your energy bills	64	25	60	25	58	20
You worry about being able to pay your energy bills but usually manage to do so	71	20	70	19	66	15
You sometimes cannot pay your energy bills on time	77	14	66	16	61	15
You often cannot pay your energy bills on time	73	19	68	21	59	21

(%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

3. Provider selection and switching behaviour

3.1. Important factors in selecting an energy provider

Energy decision-makers were then asked about important factors (beside price) when selecting an energy provider. This section distinguishes between respondents who switched providers within the last three years and those who did not switch in this timeframe. (See Section 3.2 for a discussion about switching rates.)

Notably, the ranking of factors is consistent across both those who switched and those who did not switch energy providers within the last three years.

Quality of service ranks first, selected by over one-third of those who switched (36%) and more than half of those who did not switch (52%).

Reputation of the provider follows, selected by at least one-third of respondents in both groups (34% for switchers, 38% for non- switchers).

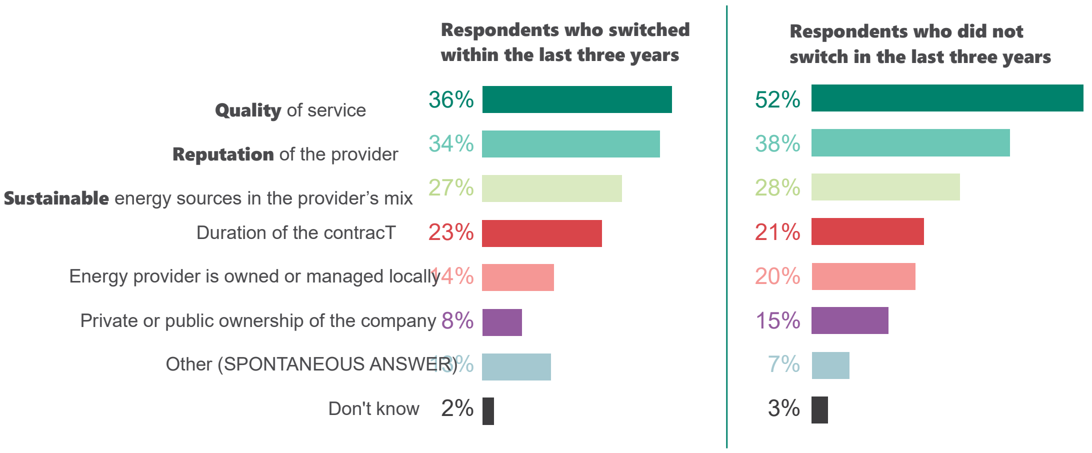
Sustainable energy sources in the provider's mix are important to fewer than three in ten respondents of both groups (27% for switchers and 28% for non-switchers).

Duration of the contract is indicated as an important factor by more than one-fifth of respondents in both groups (23% and 21% respectively).

Smaller shares of both groups point to the importance of the energy provider being owned or managed locally (14% and 20% respectively of switchers and non-switchers); the private or public ownership of the company (8% and 15% respectively); or any other factor (13% and 7% respectively).

Q10 When you most recently switched energy providers,which factors,beside price,were most important in your choice?

If you were to switch energy provider,aside from price,what factor would be most important in your decision?
You can give up to three responses. [MULTIPLE ANSWERS]



(%) Base: n=6 703 – Respondents who switched within the last three years / n=11 547 – Respondents who did not switch in the last three years

Country differences

In almost every Member State, among respondents who did not switch energy providers in the past three years, quality of service is indicated as an important factor (beside price) when selecting an energy provider by the largest share of respondents. This factor is cited by between 39% of non-switchers in Denmark and 78% in Malta. Quality of service is also an important factor for respondents who switched providers in the past three years ranking first in 14 Member States. The highest proportions of switchers selecting this factor can be observed in Romania (58%), Portugal (55%), Slovakia (55%) and Czechia (54%).

In five Member States, among switchers, the highest-ranking factor is reputation of the provider; this applies to Czechia (55%), the Netherlands (53%), Bulgaria (43%), Denmark (34%) and Latvia (28%). This reason, however, is also an important one for switchers in Romania (54%) and Slovakia (49%). Among non-switchers, this is the highest-ranking factor in Poland (54%) and the Netherlands (48%, jointly with the quality of service).

Sustainable energy sources in the provider’s mix are mentioned as an important factor by 46% of switchers in Belgium, 37% in Sweden and 35% in Austria – in these Member States, this factor is the most cited one. Among non-switchers, those in Sweden (50%) and Denmark (41%) predominantly cite this factor.

Q10a When you most recently switched energy providers, which factors, beside price, were most important in your choice? You can give up to three responses. [MULTIPLE ANSWERS]

	Quality of service	Reputation of the provider	Sustainable energy sources in the provider's mix	Duration of the contract	Energy provider is owned or managed locally	Private or public ownership of the company	Other (SPONTANEOUS ANSWER)	Don't know
EU27	36	34	27	23	14	8	13	2
BE	44	42	46	27	12	7	12	6
BG	28	43	15	30	10	0	20	0
CZ	54	55	14	31	12	5	9	3
DK	28	34	23	9	8	5	30	7
DE	40	28	33	35	21	13	7	4
EE	29	28	13	23	7	11	21	10
IE	33	28	21	31	13	6	14	2
EL	37	33	16	18	4	14	16	8
ES	37	33	14	12	14	6	13	0
FR	31	28	25	21	7	15	34	0
HR	33	14	10	9	20	7	29	8
IT	35	34	27	16	13	1	16	3
CY	-	-	-	-	-	-	-	-
LV	27	28	13	22	5	4	22	3
LT	36	35	20	36	6	19	9	6
LU	35	33	21	12	23	17	0	0
HU	25	8	25	13	7	15	34	10
MT	-	-	-	-	-	-	-	-
NL	23	53	35	35	14	2	0	0
AT	16	30	35	20	21	5	17	1
PL	48	41	32	24	6	3	2	1
PT	55	24	33	24	13	8	0	2
RO	58	54	25	30	20	27	7	2
SI	40	20	18	11	8	5	19	8
SK	55	49	26	19	7	10	11	2
FI	19	26	30	32	15	5	11	7
SE	22	23	37	21	16	4	18	3

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each country is shown in dark green and white font.

(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

Q10b If you were to switch energy provider, aside from price, what factor would be most important in your decision? You can give up to three responses. [MULTIPLE ANSWERS]

	Quality of service	Reputation of the provider	Sustainable energy sources in the provider's mix	Duration of the contract	Energy provider is owned or managed locally	Private or public ownership of the company	Other (SPONTANEOUS ANSWER)	Don't know
EU27	52	38	28	21	20	15	7	3
BE	70	53	47	33	20	10	3	5
BG	60	34	5	9	12	7	4	2
CZ	60	53	20	27	9	12	5	5
DK	39	38	41	11	16	11	11	5
DE	48	28	32	27	34	15	9	6
EE	55	37	16	19	15	12	8	8
IE	46	34	15	20	19	13	6	3
EL	47	29	20	13	12	27	5	7
ES	52	42	25	23	9	30	0	0
FR	44	36	27	19	26	12	16	0
HR	55	20	31	10	12	8	6	9
IT	54	36	37	19	20	13	4	4
CY	71	38	44	25	20	23	4	1
LV	40	34	14	20	6	14	9	10
LT	51	44	18	25	8	23	6	1
LU	52	51	30	9	42	24	0	2
HU	62	17	28	12	14	25	6	6
MT	78	37	45	8	30	16	1	0
NL	48	48	27	3	11	15	0	1
AT	45	30	35	21	29	13	4	2
PL	50	54	19	29	12	7	8	0
PT	65	13	38	15	6	14	4	1
RO	74	48	31	36	22	17	3	2
SI	57	16	22	15	10	6	11	6
SK	71	52	39	21	16	17	5	3
FI	40	37	31	19	33	8	4	4
SE	42	27	50	18	29	8	5	2

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each country is shown in dark green and white font.

(%) Base: n= n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Socio-demographic considerations

Among respondents who switched energy providers within the last three years, women (39%) are more likely than men (33%) to prioritise quality of service in their decision- making process.

Q10a When you most recently switched energy providers, which factors, beside price, were most important in your choice? You can give up to three responses. [MULTIPLE ANSWERS]

	Quality of service	Reputation of the provider	Sustainable energy sources in the provider's mix	Duration of the contract	Energy provider is owned or managed locally	Private or public ownership of the company	Other (SPONTANEOUS ANSWER)	Don't know
EU27	36	34	27	23	14	8	13	2
Gender								
Male	33	34	27	22	13	9	13	2
Female	39	34	26	24	15	6	13	2

(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

For those who have not switched providers recently, respondents aged 55+ (49%) are less likely to emphasise the importance of quality of service compared to those aged 25-54 (55%-56%). On the other hand, younger non-switchers aged 18-24 (33%) place more importance on sustainable energy sources in the provider's mix compared to those aged 55+ (27%). Additionally, non-switchers aged 25-39 (26%) are more likely than other age groups (16%-21%) to consider the duration of the contract an important factor.

Among non-switchers, those not working (25%) are less likely than employees or self-employed respondents (31% for both) to prioritise sustainable energy sources in the provider's mix when considering a potential switch.

Q10b If you were to switch energy provider, aside from price, what factor would be most important in your decision? You can give up to three responses. [MULTIPLE ANSWERS]

	Quality of service	Reputation of the provider	Sustainable energy sources in the provider’s mix	Duration of the contract	Energy provider is owned or managed locally	Private or public ownership of the company	Other (SPONTANEOUS ANSWER)	Don’t know
EU27	52	38	28	21	20	15	7	3
Age								
18-24	53	44	33	16	16	13	9	1
25-39	56	39	29	26	20	14	6	1
40-54	55	39	30	21	19	15	6	2
55+	49	36	27	21	21	15	8	3
Employment status								
Self-employed	50	35	31	20	20	15	6	3
Employee	54	38	31	22	22	15	7	2
Manual worker	52	39	30	23	21	14	6	2
Not working	51	39	25	22	18	15	8	3

(%) Base: n= n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

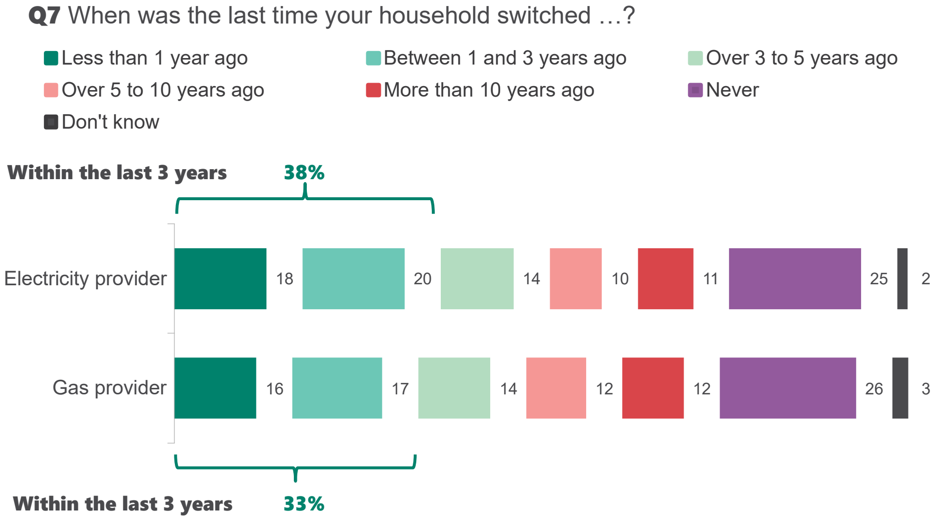
3.2. Consumer switching behaviour

Energy decision-makers were asked about their history of switching electricity and gas providers, though this question was not posed in Cyprus and Malta due to the specific structure of their energy markets.

Fewer than four in ten (38%) respondents

indicate having switched electricity providers within the last three years. About one-fourth of respondents (24%) report having switched their electricity provider between three and ten years ago. About one in ten (11%) respondents mention having done so more than ten years ago, and one-fourth (25%) of respondents have never switched their electricity provider.

Respondents connected to the natural gas grid were also asked about their gas provider switching behaviour. One-third (33%) of this group indicate having switched within the last three years. About one-fourth (26%) of this group mention having switched their gas provider between three and ten years ago. Just over one in ten (12%) respondents indicate having switched it more than ten years ago. Similar to electricity provider switching behaviour, about one-fourth (26%) of respondents report never having switched gas providers.



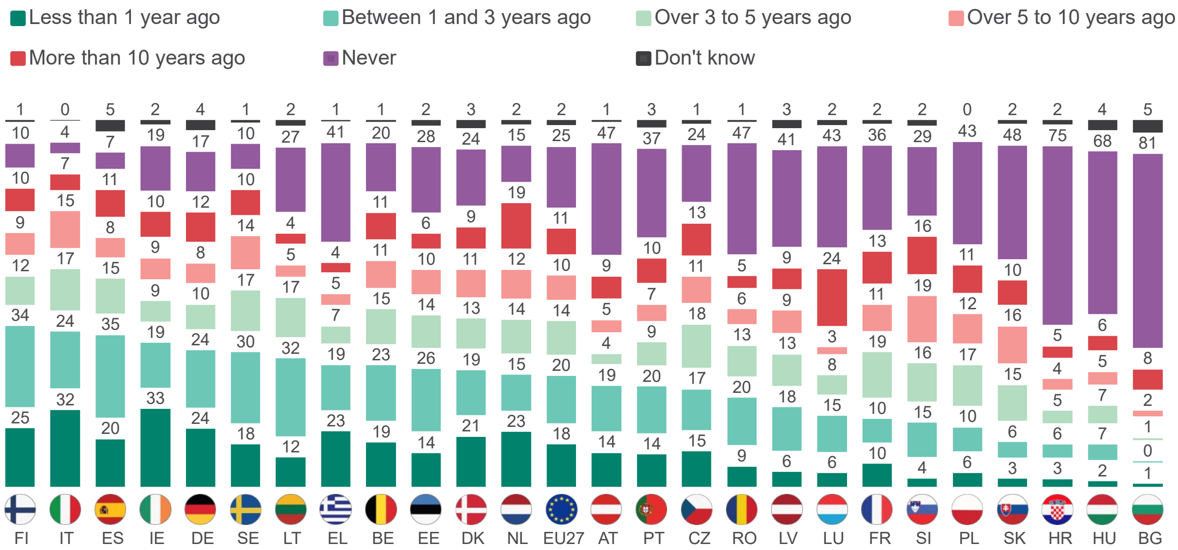
(%) Base:n=18 250 - Respondents involved in energy decisions in their household (electricity) & Base:n=7 720 – Respondents with a connection to the natural gas grid and involved in energy decisions in their household (gas)

Country differences

The proportion of respondents indicating they have switched their electricity provider within the last three years ranges from 2% in Bulgaria to 59% in Finland. [6] Besides Finland, there are three more Member States where more than half of the respondents have switched their electricity provider in the past three years: Italy (56%), Spain (55%) and Ireland (52%).

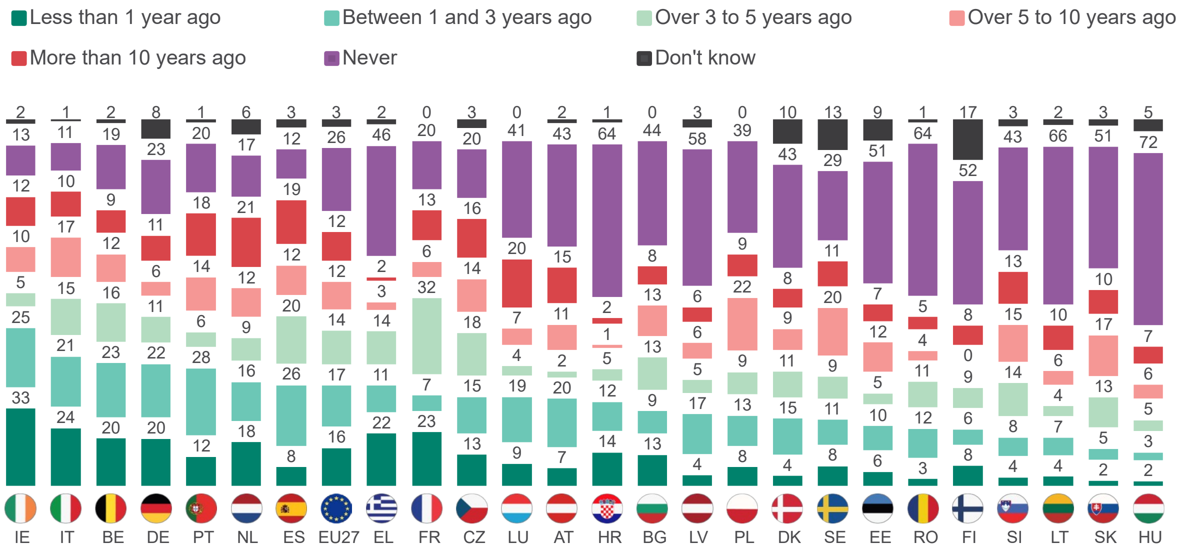
Similarly, there is a significant variation among the Member States in the proportion of respondents (connected to the gas grid) who have switched their gas provider in the past three years – from 5% in Hungary to 58% in Ireland.

Q7_1 When was the last time your household switched …? **Electricity provider**



(%) Base:n=18 250 - Respondents involved in energy decisions in their household

Q7_2 When was the last time your household switched …? **Gas provider**



(%) Base:n=7 720 – Respondents with a connection to the natural gas grid and involved in energy decisions in their household

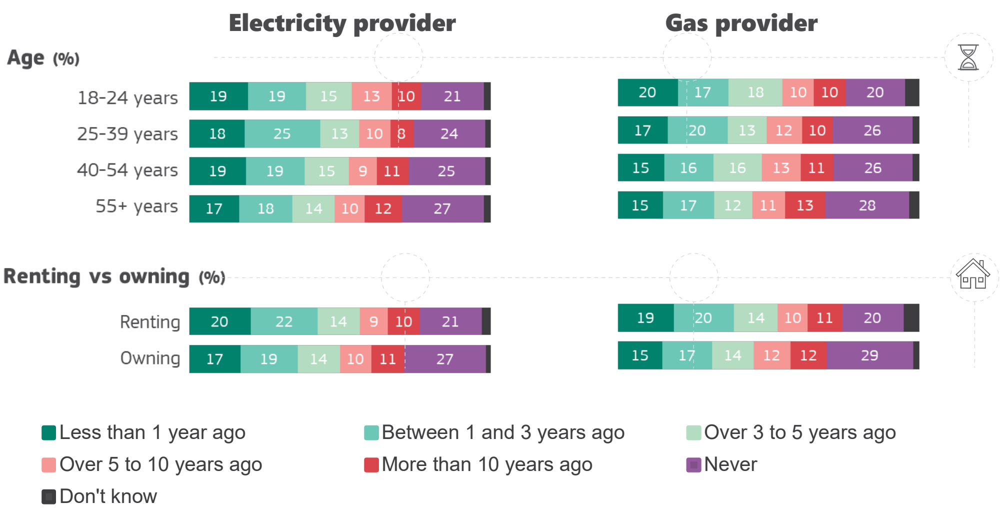
6 Due to rounding, percentages for separate response options shown in the charts do not always exactly add up to the totals mentioned in the text.

Socio-demographic considerations

Respondents aged 55 and above (27%) are more likely to report never having switched electricity providers compared to younger age groups (21% of 18-24 and 24% of 25-39 year-olds). A similar pattern is observed for gas providers, with the 55+ age group more likely than 18-24 year-olds to report never having changed providers (28% vs 20%). This older group (34%) is also less likely to have switched electricity providers within the last three years compared to those aged 25-39 (43%) and 40-54 (38%).

Housing status also plays a role, with renters showing a higher propensity to having recently switched providers. They are more likely than owners to have switched electricity providers (43% vs 36%) and gas providers (39% vs 31%) within the last three years.

Q7 When was the last time your household switched …?



(%) Base:n=18 250 - Respondents involved in energy decisions in their household (electricity) & Base:n=7 720 – Respondents with a connection to the natural gas grid and involved in energy decisions in their household (gas)

3.3. Reasons for switching

Energy decision-makers who switched energy providers within the last three years were asked about the primary reasons for their most recent decision.

About two-thirds (68%) of respondents in this group indicate they switched because they found an offer with a better price.

Other reasons for switching are reported by smaller shares of respondents: moving house (18%); recommendations from family, friends or colleagues (13%); wanting a more environmentally-friendly energy provider (11%); having experienced billing problems (10%); poor customer service (8%); having been contacted by another energy provider (7%); to benefit from extra services another energy provider provides, like offering home insulation or other energy efficiency measures (5%).

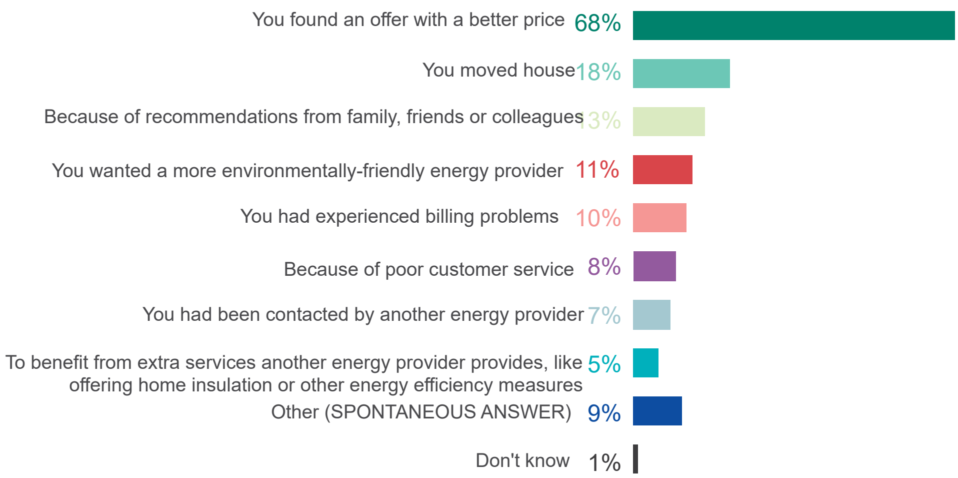
About one in ten (9%) respondents mention any ‘other’ reasons.

Country differences

Across all but two Member States, the largest share of switchers have done so because they found an offer with a better price. Moreover, in 23 Member States, this reason is cited by at least half of respondents (from 50% in Slovakia to 85% in Portugal).

In Hungary, the largest share of respondents (43%) have switched energy providers after moving house[7]. In Croatia, ‘other’ reasons rank first and are cited by 29% of respondents.

Q9a What were the primary reasons for your most recent decision to switch energy providers? You can give up to three responses. [MULTIPLE ANSWERS]



(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

Q9a What were the primary reasons for your most recent decision to switch energy providers? You can give up to three responses. [MULTIPLE ANSWERS]

	You found an offer with a better price	You moved house	Because of recommendations from family, friends or colleagues	You wanted a more environmentally-friendly energy provider	You had experienced billing problems	Because of poor customer service	You had been contacted by another energy provider	To benefit from extra services another energy provider provides, like offering home insulation or other energy	Other (SPONTANEOUS ANSWER)
EU27	68	18	13	11	10	8	7	5	9
BE	72	25	14	32	14	14	11	7	6
BG	69	14	10	4	26	3	4	20	0
CZ	68	17	14	5	5	9	16	6	13
DK	41	26	9	8	6	13	5	11	18
DE	64	15	8	22	4	7	4	7	9
EE	66	20	10	6	2	3	7	4	12
IE	83	6	14	16	7	8	8	9	0
EL	67	14	18	3	27	20	19	3	2
ES	72	15	12	6	15	4	8	2	0
FR	75	14	10	4	11	7	2	4	19
HR	26	18	15	7	5	6	15	3	29
IT	63	17	17	5	11	5	6	2	15
CY	-	-	-	-	-	-	-	-	-
LV	67	18	7	4	2	1	12	5	8
LT	59	14	21	14	5	6	8	6	11
LU	55	16	11	21	4	5	14	1	10
HU	9	43	13	1	2	3	21	1	20
MT	-	-	-	-	-	-	-	-	-
NL	69	28	14	12	6	17	4	12	12
AT	75	12	10	22	8	6	2	4	9
PL	77	25	12	11	13	9	5	1	2
PT	85	30	24	7	5	11	12	8	0
RO	69	22	34	16	23	20	21	8	7
SI	62	10	25	9	0	4	6	10	11
SK	50	27	9	20	13	9	13	11	10
FI	72	23	3	13	2	5	8	4	8
SE	55	26	10	17	4	4	10	7	9

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each country is shown in dark green and white font.

(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

7 Caution should be exercised when interpreting this figure due to small base size (<100 respondents).

Socio-demographic considerations

The likelihood of citing a better price offer as the main reason for switching increases with age, from 57% of 18-24 year-olds to 70% of those aged 40 and over. Conversely, moving house as a reason decreases with age, from 26% of 18- 24 year-olds to 13% of those 55+. The youngest age group (18-24) is also most likely to cite billing problems as a main reason for switching (15% vs 9%-10% of other age groups).

Compared to respondents in other occupation groups, manual workers are less likely to mention finding a better price offer as their main reason for switching (58% vs 68%-69% of other occupation groups).

Housing status also plays a role, with homeowners being more likely than renters to switch due to better price offers (70% vs 62%) and less likely to switch due to moving houses (16% vs 24%).

Q9a What were the primary reasons for your most recent decision to switch energy providers? You can give up to three responses. [MUL ANSWERS]

	You found an offer with a better price	You moved house	Because of recommendations from family, friends or colleagues	You wanted a more environmentall y-friendly energy provider	You had experienced billing problems	Because of poor customer service	You had been contact ed by another energy provider	To benefit from extra services another energy provider provides, like offering home insulation or other energy efficiency measures	Other (SPONTANEOUS ANSWER)
EU27	68	18	13	11	10	8	7	5	
Age									
18-24	57	26	15	5	15	9	4	5	
25-39	65	23	15	14	9	9	6	6	
40-54	70	18	13	10	9	8	6	4	
55+	70	13	12	12	10	7	8	4	
Occupation									
Self-employed	69	17	12	14	10	10	8	3	
Employee	68	19	14	12	9	8	7	6	
Manual worker	58	25	13	7	18	4	10	2	
Not working	69	16	14	10	10	7	7	4	
Housing Status									
Renting	62	24	13	12	10	9	4	5	
Owning	70	16	13	11	10	7	8	5	

(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

3.4. Reasons not to switch

Energy decision-makers who did not switch energy providers in the last three years were asked about the main reasons that stopped them from switching energy providers in this timeframe. This question was not posed in Cyprus and Malta due to the specific structure of their energy markets.

Just over half (52%) of respondents in this group indicate they did not switch because they are satisfied with the reliability, service and price of their current energy provider.

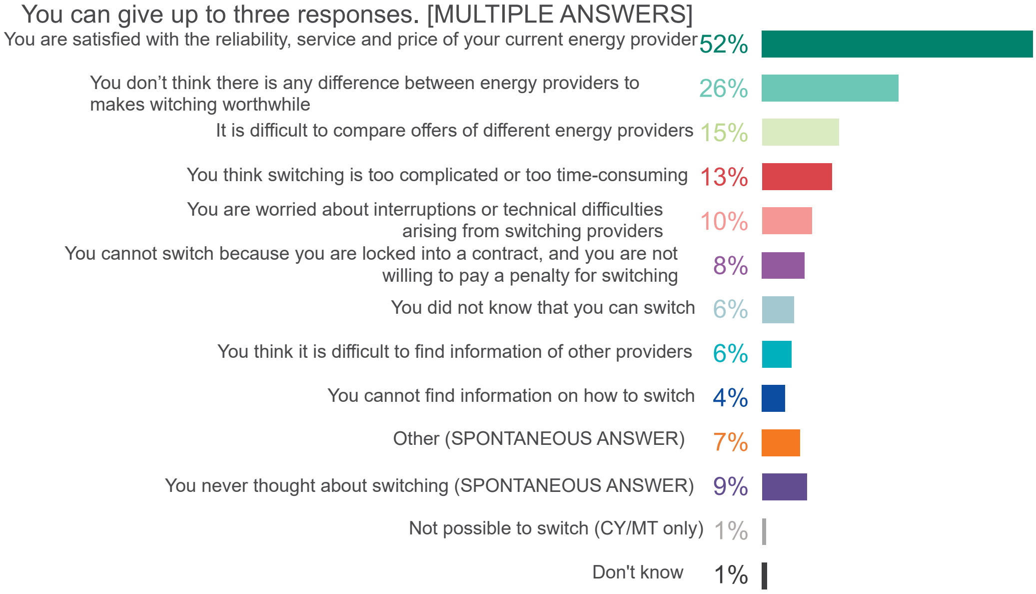
About one in four (26%) respondents reply they do not think there is any difference between energy providers to make switching worthwhile.

The next three reasons are each mentioned by at least one in ten respondents: difficulty comparing offers from different energy providers (15%); the perception that switching is too complicated or too time- consuming (13%) and concerns about interruptions or technical difficulties arising from switching providers (10%).

Smaller shares (below 10%) mention other barriers to switching, namely: being locked into a contract with an unwillingness to pay a penalty for switching (8%); a lack of awareness about the possibility to switch (6%); the perceived difficulty finding information about other providers (6%); the inability to find information on how to switch (4%), or other reasons (7%).

About one in ten (9%) respondents report never having thought about switching.

Q9b What are the main reasons that stopped you from switching energy provider in the past three years?
You can give up to three responses. [MULTIPLE ANSWERS]



(%) Base: n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Country differences

In almost every Member State, the largest share of respondents who did not switch energy providers in the past three years did not switch because they are satisfied with the reliability, service and price of their current energy provider. This reason is cited by 74% of respondents in Czechia, 73% in Sweden and 71% in Belgium. In contrast, in Poland, just 19% of non-switchers cite this reason, while 31% say that they did not switch because they do not think there is any difference between energy providers to make switching worthwhile. The latter reason is also the most cited reason in Romania (selected by 50%). Other Member States where this reason is cited by more than four in ten respondents are Lithuania (50%), Estonia (45%), Greece (45%) and Italy (42%).

Q9b What are the main reasons that stopped you from switching energy provider in the past three years? You can give up to three respo
ANSWERS]

	You are satisfied with the reliability, service and price of your current energy provider	You don't think there is any difference between energy providers to make switching worthwhile	It is difficult to compare offers of different energy providers	You think switching is too complicated or too time-consuming	You are worried about interruptions or technical difficulties arising from switching providers	You cannot switch because you are locked into a contract, and you are not willing to pay a penalty for switching	You did not know that you can switch	You think it is difficult to find information of other providers	You cannot find information on how to switch	Other (SPONTANEOUS ANSWER)
EU27	52	26	15	13	10	8	6	6	4	7
BE	71	29	30	23	13	6	2	8	6	3
BG	25	13	1	6	2	4	17	1	11	20
CZ	74	35	15	15	3	15	3	5	1	3
DK	61	16	9	12	2	2	1	5	1	8
DE	62	11	8	10	4	3	7	2	3	10
EE	58	45	6	6	1	9	2	3	3	7
IE	45	22	20	10	5	26	4	6	2	7
EL	46	45	13	14	12	6	0	5	2	5
ES	50	31	10	10	8	8	5	3	3	9
FR	63	16	15	11	13	6	7	4	6	11
HR	34	31	8	14	13	4	6	10	4	8
IT	57	42	26	6	13	4	7	4	4	6
CY	-	-	-	-	-	-	-	-	-	-
LV	55	28	8	5	2	4	0	2	1	5
LT	55	50	16	11	9	10	1	2	3	2
LU	45	13	7	16	7	6	4	6	16	13
HU	33	22	10	13	7	5	21	9	7	12
MT	-	-	-	-	-	-	-	-	-	-
NL	60	26	6	18	0	3	2	4	2	6
AT	48	31	10	19	13	11	3	8	5	1
PL	19	31	25	19	13	18	6	10	2	2
PT	56	20	1	13	7	5	5	2	13	6
RO	47	50	21	28	21	17	4	19	10	3
SI	63	29	10	8	6	4	1	5	2	3
SK	69	38	14	16	14	5	2	6	4	3
FI	68	34	9	11	4	9	1	5	1	4
SE	73	31	16	19	3	7	2	3	1	3

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each count
dark green and white font.

(%) Base: n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Socio-demographic considerations

Homeowners are more inclined to believe there is no significant difference between energy providers to make switching worthwhile (28% vs 22% of renters). They are also more likely to perceive the switching process as too complicated or time-consuming (15% vs 10% of renters).

Q9b What are the main reasons that stopped you from switching energy provider in the past three years? You can give up to three responses. [MULTIPLE ANSWERS]

	You are satisfied with the reliability, service and price of your current energy provider	You don’t think there is any difference between energy providers to make switching worthwhile	It is difficult to compare offers of different energy providers	You think switching is too complicated or too time-consuming	You are worried about interruptions or technical difficulties arising from switching providers	You cannot switch because you are locked into a contract, and you are not willing to pay a penalty for switching	You did not know that you can switch	You think it is difficult to find information of other providers	You cannot find information on how to switch	Other (SPONTANEOUS ANSWER)	You never thought about switching (SPONTANEOUS ANSWER)	Don’t know
EU27	52	26	15	13	10	8	6	6	4	7	9	1
Housing status												
Renting	54	22	13	10	11	8	7	4	4	8	9	2
Owning	51	28	16	15	9	8	6	6	4	7	8	1

(%) Base: n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

3.5. Information sources for switching decisions

Energy decision-makers, regardless of whether they had switched energy providers within the last three years, were asked about their main information sources for switching decisions - either decisions already made or potential future choices.

For recent switchers, energy providers' websites and price comparison websites are each cited as a common information source by 34% of respondents. For non-switchers, in- person recommendations from friends, family or colleagues emerge as the primary source of information (mentioned by 46% compared to 25% of switchers), followed by price comparison websites (34%) and energy providers' websites (33%).

Non-switchers also show a higher propensity to consult official information or campaigns from public authorities (18% vs 9% for switchers) and reviews from consumer organisations (17% vs 12% for switchers).

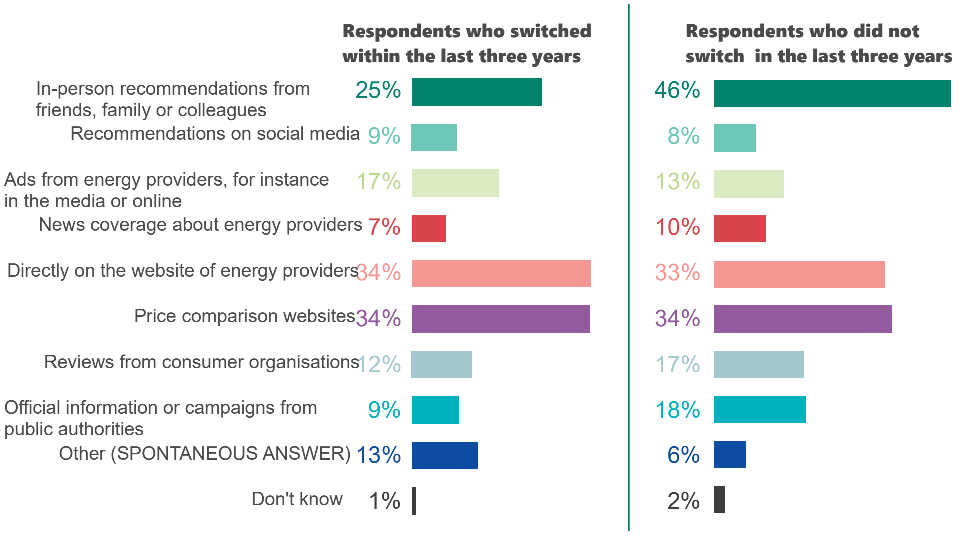
Advertisements from energy providers (such as in the media or online) are more influential for recent switchers (17%) compared to non-switchers (13%).

News coverage about energy providers is cited by 10% of non-switchers and 7% of switchers.

Recommendations on social media are the least utilised source for both groups (9% for switchers, 8% for non-switchers).

Other sources (spontaneously mentioned) are indicated by 13% of switchers and 6% of non-switchers.

Q8 How did you inform yourself when choosing your current energy providers / energy provider?
How would you inform yourself if you were choosing an energy provider?
You can give up to three responses. [MULTIPLE ANSWERS]



(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household) / n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Country differences

Recent switchers in 17 out of 27 Member States are most likely to indicate energy providers' websites or price comparison websites as primary information source. The largest shares of recent switchers selecting the energy providers' websites are observed in Bulgaria (53%) and Poland (49%), and the smallest ones in Slovenia (12%) and Hungary (14%). Conversely, price comparison websites are top information sources for over half of recent switchers in Belgium (63%), Finland (55%), Germany (54%), Ireland (53%) and Austria (52%). In Croatia, on the other hand, 10% of respondents share this view.

In-person recommendations from friends, family and colleagues are the primary information source for recent switchers in Slovenia (51%), Romania (50%), Greece (37%), Slovakia (36%), Croatia (32%), Latvia (25%) and Hungary (24%). In contrast, 8% of recent switchers in Poland rely on such personal recommendations.

The share of recent switchers citing ads from energy providers as their information source varies between 5% in Bulgaria and 27% in Lithuania.

Denmark stands out with 33% of recent switchers mentioning 'other' as their most frequent response. In contrast, no respondents in the Netherlands (0%) indicate this.

Three in ten (30%) recent switchers in the Netherlands report informing themselves with reviews from consumer organisations. In contrast, only 1% of this group in Latvia holds the same opinion.

A proportion of respondents ranging from 3% (in Latvia, Estonia and Ireland) to 27% (in Romania) mention they inform themselves with official information or campaigns from public authorities when choosing their energy provider.

All other information sources are mentioned by fewer than 25% of respondents across all Member States.

Q8a How did you inform yourself when choosing your current energy providers/energy provider? You can give up to three responses.
[MULTIPLE ANSWERS]

	In-person recommendations from friends, family or colleagues	Recommendations on social media	Ads from energy providers, for instance in the media or online	News coverage about energy providers	Directly on the website of energy providers	Price comparison websites	Reviews from consumer organisations	Official information or campaigns from public authorities	Other (SPONTANEOUS ANSWER)
EU27	25	9	17	7	34	34	12	9	13
BE	19	5	12	13	33	63	19	18	
BG	49	5	5	9	53	27	14	6	
CZ	32	2	15	7	39	35	9	8	19
DK	23	7	15	2	24	21	9	4	33
DE	21	20	20	5	29	54	8	4	
EE	35	6	14	4	41	46	2	3	
IE	15	5	13	2	35	53	12	3	
EL	37	10	23	6	24	19	5	6	20
ES	27	3	18	4	39	21	7	11	16
FR	20	6	24	4	38	21	24	8	
HR	32	8	16	13	17	10	8	17	19
IT	30	5	11	10	31	20	8	13	20
CY	-	-	-	-	-	-	-	-	
LV	25	8	21	3	23	24	1	3	14
LT	38	16	27	10	33	42	8	14	
LU	21	23	8	8	42	28	11	17	
HU	24	12	11	6	14	14	3	15	22
MT	-	-	-	-	-	-	-	-	
NL	16	18	17	12	42	50	30	6	
AT	22	10	26	5	18	52	5	13	14
PL	8	2	11	1	49	36	21	4	14
PT	36	4	17	7	28	45	5	9	11
RO	50	15	21	20	38	35	12	27	
SI	51	14	21	2	12	19	6	7	
SK	36	13	21	2	35	31	11	13	15
FI	23	6	14	3	45	55	2	4	
SE	25	4	12	2	30	44	8	5	17

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each count shown in dark green and white font.

(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

In all but five Member States, non-switchers most commonly mention in-person recommendations from friends, family or colleagues as a preferred potential source. This preference peaks in Austria, where 62% of non- switchers cite this information source. In contrast, about three in ten (29%) non-switchers in Finland share this preference.

Price comparison websites emerge as the preferred potential information source in Belgium (54%), Sweden (47%) and Denmark (44%) for non-switchers considering a future switch.

Energy providers' websites top the list of preferred information sources in Finland and Estonia, both at 47%.

Luxembourg stands out with 39% of non-switchers indicating a preference for official information or campaigns from public authorities as their go-to source if they were to choose an energy provider in the future. This contrasts with Spain (7%), Finland (8%), Ireland (8%) and Estonia (9%), where fewer than one in ten non-switchers share this preference.

The largest shares of non-switchers valuing reviews from consumer organisations as information sources are found in Luxembourg (37%), Slovakia (34%) and the Netherlands (34%). The smallest share reporting this is, in turn, observed in Estonia (4%).

All other potential information sources are mentioned by no more than three in ten respondents across all Member States.

Q8b How would you inform yourself if you were choosing an energy provider? You can give up to three responses. [MULTIPLE ANSWERS]

	In-person recommendations from friends, family or colleagues	Recommendations on social media	Ads from energy providers, for instance in the media or online	News coverage about energy providers	Directly on the website of energy providers	Price comparison websites	Reviews from consumer organisations	Official information or campaigns from public authorities	Other (SPONTANEOUS ANSWER)	Don't know
EU27	46	8	13	10	33	34	17	18	6	2
BE	44	5	12	22	38	54	28	28	2	3
BG	46	11	9	3	26	26	7	14	3	2
CZ	54	8	10	11	44	34	21	17	5	1
DK	40	7	6	8	31	44	28	12	5	4
DE	45	19	24	9	28	35	14	13	3	4
EE	43	7	13	10	47	46	4	9	5	4
IE	56	9	19	13	15	24	6	8	4	3
EL	47	11	14	4	33	23	20	23	4	5
ES	53	5	7	7	48	44	25	7	0	0
FR	43	3	11	16	30	25	12	14	16	2
HR	54	12	12	6	21	15	18	15	6	6
IT	52	1	13	10	43	35	22	19	8	0
CY	57	27	27	20	35	30	23	29	2	0
LV	39	16	16	5	22	31	5	11	5	4
LT	46	18	17	8	35	41	7	20	2	0
LU	45	1	5	5	18	23	37	39	8	0
HU	43	16	15	9	32	35	14	18	4	2
MT	44	26	17	10	27	28	24	25	6	3
NL	36	3	18	3	32	29	34	12	0	2
AT	62	12	9	2	24	36	26	19	0	3
PL	38	2	8	5	25	36	6	25	7	0
PT	40	9	11	8	17	35	26	22	9	4
RO	51	16	20	18	37	37	20	37	3	1
SI	55	10	15	4	29	32	20	18	2	1
SK	56	12	11	8	47	40	34	21	3	2
FI	29	6	11	11	47	44	7	8	4	6
SE	43	4	10	7	43	47	28	17	1	0

Note: The higher the share of respondents selecting a response, the darker green the cell. The highest-ranking response for each country is shown in dark green and white font.

(%) n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Socio-demographic considerations

The socio-demographic analysis reveals some differences in information seeking behaviour among both recent switchers and non-switchers.

Among recent switchers, men (37%) are more likely than women (32%) to consult price comparison websites. Among non-switchers, women (48%) are more likely than men (44%) to cite in-person recommendations from friends, family or colleagues.

Age also influences preferences of information sources among both switchers and non-switchers. Recent switchers aged 55+ (29%) are less inclined to use price comparison websites compared to those aged 40-54 (37%) or 25-39 (40%). The same difference is seen among non-switchers (31% of 55+ non-switchers vs 37% and 38% respectively). Among non-switchers, those aged 25-39 are more likely than older groups to mention being informed by in-person recommendations (49% vs 44% of older groups). On the other hand, non-switchers aged 55+ (31%) are less likely than those aged 40-54 (36%) to indicate using energy providers' websites.

Relating to occupation, recent switchers who are employees (41%) or self-employed (34%) are more likely to use price comparison websites than those not currently working (28%). The same is true among non-switchers (36% and 37% vs 31%).

Q8a How did you inform yourself when choosing your current energy providers/energy provider? You can give up to three responses. [MULTIPLE ANSWERS]

	In-person recommendations from friends, family or colleagues	Recommendations on social media	Ads from energy providers, for instance in the media or online	News coverage about energy providers	Directly on the website of energy providers	Price comparison websites	Reviews from consumer organisations	Official information or campaigns from public authorities	Other (SPONTANEOUS ANSWER)	Don't know
EU27	25	9	17	7	34	34	12	9	13	1
Gender										
Male	23	9	17	6	35	37	11	10	11	1
Female	27	9	16	7	34	32	12	9	14	1
Age										
18-24	28	9	16	8	34	33	13	6	14	1
25-39	28	10	14	6	37	40	12	8	12	0
40-54	23	8	18	7	35	37	11	9	11	1
55+	24	9	18	6	33	29	11	10	14	1
Occupation										
Self-employed	22	6	18	5	38	34	11	8	9	1
Employee	23	10	15	8	34	41	12	9	11	0
Manual worker	22	5	17	4	28	32	9	9	16	2
Not working	28	9	18	6	34	28	11	10	15	1

(%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

Q8b What were the primary reasons for your most recent decision to switch energy providers? You can give up to three responses. [M
ANSWERS

	In-person recommendations from friends, family or colleagues	Recommendations on social media	Ads from energy providers, for instance in the media or online	News coverage about energy providers	Directly on the website of energy providers	Price comparison websites	Reviews from consumer organisations	Official information or campaigns from public authorities	(SPONT/
EU27	46	8	13	10	33	34	17	18	
Gender									
Male	44	8	14	11	34	35	19	18	
Female	48	8	13	9	32	33	16	17	
Age									
18-24	47	6	11	11	30	33	18	13	
25-39	49	7	13	8	35	38	18	17	
40-54	44	9	14	11	36	37	18	18	
55+	44	8	14	10	31	31	16	18	
Occupation									
Self-employed	44	7	10	8	31	37	18	17	
Employee	46	9	14	10	36	36	19	18	
Manual worker	51	5	10	12	32	40	15	19	
Not working	45	8	14	10	31	31	16	18	

(%) n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Comments

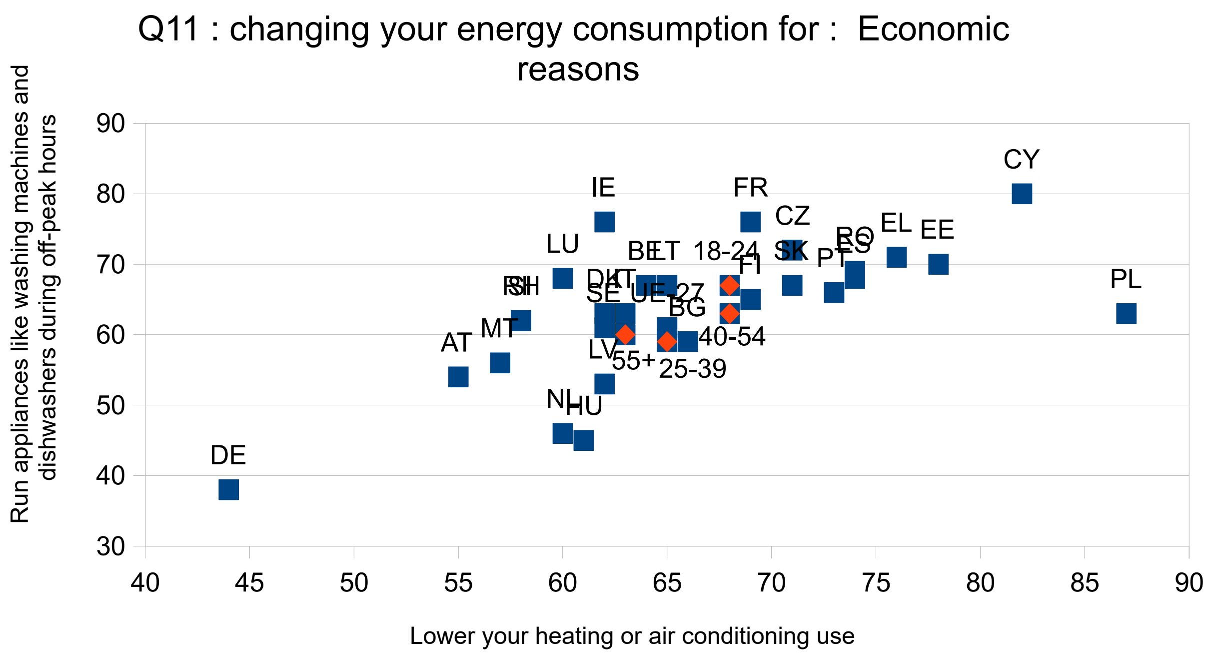
(Pierre Dieumegard)

There is very little socio-demographic data: gender for some questions, age for others, or the type of dwelling or difficulties in paying bills. It is regrettable that the tables in the report are not more complete and consistent. It is even more regrettable that the raw data tables in xlsx format are not available.

Question Q11 asks people why they might change their behaviour to achieve a better energy transition. The vast majority replied: ‘for economic reasons, not for ecological reasons’. (But well done to the Germans, who seem to be more morally motivated than other Europeans to make an energy transition).

The graph below shows people's willingness to change their energy consumption behaviour for economic rather than ecological reasons. The various countries are represented by blue squares. Age groups are shown in red.

There are far fewer differences between age groups than between countries.



Each country lives in its own information bubble, and national opinions differ from one another. To develop a European policy, information needs to circulate between countries. **We need a common language to debate our common future together. The best common language would be Esperanto**.

As the governments of all the countries are in debt, here's a proposal to encourage their populations to behave virtuously: **increase taxes on energy, and in particular on fossil fuels**. States will be less indebted, and individuals will change their behaviour, since they need economic reasons to change.

Technical specifications

Between 30 June and 15 July 2025, Ipsos European Public affairs carried out flash Eurobarometer 566 at the request of the European Commission, Directorate-General for Energy. It is a general public survey coordinated by the Directorate-General for Communication, 'Public Opinion and Citizens Engagement' unit. flash Eurobarometer 566 covers the population of EU citizens, residents in one of the 27 Member States of the European Union, and aged 18 years and over.

For the purposes of this report, the target group is limited to EU citizens, aged 18 and over, involved in making decisions about energy providers in their households (excluding those who indicate that the price of energy is set because it is included in their rent without the possibility to opt-out).

All interviews were carried via computer-assisted telephone interviewing (CATI). In each country, respondents were called both on landlines and mobile phones. The telephone numbers sampled and contacted were generated via Random Digit Dialling (RDD) methods. The basic sample design applied in all countries is a random (probability) design. In households contacted via a landline phone, the respondent was drawn at random from all household members (aged 18 years and over) following the "most recent birthday rule".

Statistical margins due to sampling tolerances

(at the 95 % level of confidence)

various sample sizes are in rows — various observed results are in columns

	5 %	10 %	25 %	50 %	75 %	90 %	95 %
n=50	±6.0	±8.3	±12.0	±13.9	±12.0	±8.3	±6.0
n=100	±4.3	±5.9	±8.5	±9.8	±8.5	±5.9	±4.3
n=200	±3.0	±4.2	±6.0	±6.9	±6.0	±4.2	±3.0
n=500	±1.9	±2.6	±3.8	±4.4	±3.8	±2.6	±1.9
n=1000	±1.4	±1.9	±2.7	±3.1	±2.7	±1.9	±1.4
n=1500	±1.1	±1.5	±2.2	±2.5	±2.2	±1.5	±1.1
n=2000	±1.0	±1.3	±1.9	±2.2	±1.9	±1.3	±1.0

flash Eurobarometer 566
Consumer behaviour in the energy transition

	Fieldwork dates	Number of interviews EU citizens, aged 18+	Number of interviews EU citizens, aged 18+, involved in making decisions about energy providers in their household
EU27	30.06.25-15.07.25	25704	18250
BE	30.06.25-15.07.25	1000	810
BG	30.06.25-05.07.25	1008	560
CZ	30.06.25-08.07.25	1001	730
DK	30.06.25-09.07.25	1007	759
DE	30.06.25-10.07.25	1011	623
EE	30.06.25-09.07.25	1003	727
IE	30.06.25-05.07.25	1011	821
EL	30.06.25-09.07.25	1000	795
ES	30.06.25-05.07.25	1009	739
FR	30.06.25-05.07.25	1006	687
HR	30.06.25-10.07.25	1005	742
IT	30.06.25-05.07.25	1006	672
CY	30.06.25-07.07.25	505	386
LV	30.06.25-09.07.25	1008	614
LT	30.06.25-10.07.25	1015	670
LU	30.06.25-05.07.25	506	327
HU	30.06.25-09.07.25	1004	746
MT	30.06.25-05.07.25	505	383
NL	30.06.25-05.07.25	1014	907
AT	30.06.25-05.07.25	1009	667
PL	30.06.25-05.07.25	1010	763
PT	30.06.25-07.07.25	1009	545
RO	30.06.25-10.07.25	1013	798
SI	30.06.25-09.07.25	1005	671
SK	30.06.25-08.07.25	1000	667
FI	30.06.25-07.07.25	1024	695
SE	30.06.25-09.07.25	1010	746

Questionnaire

ASK ALL

DX1 For each of the following statements, please tell me whether it applies or not.

(READ OUT; ONE ANSWER PER LINE)

DX1_1 DO NOT ASK in CY and MT: Your household is connected to the natural gas grid

DX1_2 You are involved in making decisions about energy providers in your household

(RESPONSE SCALE)

Yes 1

No 2

ASK ALL

DX2 Which type of pricing best describes your household’s electricity contract?

(READ OUT; ONE ANSWER ONLY) (DO NOT ASK in CY and MT)

Fixed price for the entire contract duration 1

Price changes at certain times during the contract period (e.g. per month, 3 months, 6 months or others) 2

Price changes (hourly or more) based on the wholesale market developments (i.e. spot price) 3

Price set by public authorities 4

The price of energy is set because it is included in your rent without the possibility to opt out 5

Another type of contract (SPONTANEOUS) 6

Don't know (DO NOT READ OUT) 98

ASK ALL

DX3

What is your current housing situation? Please choose the option that best describes your status.

(READ OUT; ONE ANSWER ONLY)

Renting a single-family home 1

Renting an apartment 2

Owning a single-family home 3

Owning an apartment 4

Other 5

Don't know (DO NOT READ OUT) 98

ASK ALL

Q1 How much do you trust the following to provide fair prices and reliable service?

(READ OUT; ONE ANSWER PER LINE)

Q1_1 The energy market of [YOUR COUNTRY]

Q1_2 IF DX1_1=1: Your electricity and gas providers; ELSE: Your electricity provider

(RESPONSE SCALE)

Trust a lot 1

Tend to trust 2

Tend not to trust 3

Do not trust at all 4

Don't know (DO NOT READ OUT) 98

ASK ALL

Q2 How much do you agree or disagree with the following statements about IF DX1_1=1: your electricity and gas providers; ELSE: your electricity provider?

(READ OUT; ONE ANSWER PER LINE)

(RANDOMISE)

Q2_1 It is easy to get in contact with your energy provider when you need assistance or information

Q2_2 Your energy bills are easy to understand

Q2_3 Your energy provider provides easy-to-understand information about offers and promotions

Q2_4 Your energy provider is investing sufficiently in renewable energy sources

(RESPONSE SCALE)

Totally agree 1

Tend to agree 2

Tend to disagree 3

Totally disagree 4

Don't know (DO NOT READ OUT) 98

ASK ALL

Q3 How much do you agree or disagree with the following statements about IF DX1_1=1: your electricity and gas providers; ELSE: your electricity provider?

(READ OUT; ONE ANSWER PER LINE)

Q3_1 Energy consumers in [YOUR COUNTRY] are well protected (for instance, against unfair practices or disconnection)

Q3_2 If you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance

Q3_3 You would trust an energy provider more if they committed to an officially certified code of practice on consumer rights

(RESPONSE SCALE)

Totally agree 1

Tend to agree 2

Tend to disagree 3

Totally disagree 4

Don't know (DO NOT READ OUT) 98

ASK ALL

Q4 To make the energy market in [YOUR COUNTRY] work better for consumers, which of the following areas most need improvement?

You can give up to two responses.

(READ OUT; MAX 2 ANSWERS) (EXCLUDE ITEM 3 in CY and MT)

(RANDOMISE ITEMS 1-5)

More clarity and transparency of energy bills 1

More prevention of unfair commercial practices (e.g. telemarketing) 2

Easier switching between energy providers 3

Better access to energy data and digital tools to monitor and adapt your energy consumption 4

Better protection of vulnerable consumers and those in energy poverty 5

Other (SPONTANEOUS) 6

Don't know (DO NOT READ OUT) 98

ASK ALL

Q5 How often do you track your energy consumption? Specifically…

(READ OUT; ONE ANSWER PER LINE)

Q5_1 Your electricity consumption

Q5_2 IF DX1_1=1: Your gas consumption

(RESPONSE SCALE)

Multiple times a week 1

At least once a week 2

At least once a month 3

At least two times a year 4

At least once a year 5

Less than once a year 6

Never 7

Don't know (DO NOT READ OUT) 98

ASK ALL

Q6 Which parts of IF DX1_1=1 your electricity and gas bills; ELSE: your electricity bills, if any, do you find most difficult to understand?

You can give up to two responses.

(READ OUT; MAX 2 ANSWERS)

The cost for each unit of energy you consume 1

Taxes and charges for maintaining the energy infrastructure 2

The calculation of the total amount to be paid 3

The contract duration, early termination fees, and what happens when the contract period ends 4

None, you understand all parts 5

All of them (SPONTANEOUS) 6

You don't read your energy bill (SPONTANEOUS) 7

Don’t know (DO NOT READ OUT) 98

ASK ALL, IN ALL COUNTRIES EXCEPT MT AND CY

Q7 When was the last time your household switched …?

(READ OUT; ONE ANSWER PER LINE)

Q7_1 Electricity provider

Q7_2 IF DX1_1=1: Gas provider

(RESPONSE SCALE)

Less than 1 year ago 1

Between 1 and 3 years ago 2

Over 3 to 5 years ago 3

Over 5 to 10 years ago 4

More than 10 years ago 5

Never 6

Don't know (DO NOT READ OUT) 98

IF Q7_1 or Q7_2 =1 or 2 (Switched energy provider in the past three years)

Q8a How did you inform yourself when choosing your current IF DX1_1=1 energy providers; ELSE: energy provider?

You can give up to three responses.

(READ OUT; MAX 3 ANSWERS)

In-person recommendations from friends, family or colleagues 1

Recommendations on social media 2

Ads from energy providers, for instance in the media or online 3

News coverage about energy providers 4

Directly on the website of energy providers 5

Price comparison websites 6

Reviews from consumer organisations 7

Official information or campaigns from public authorities 8

Other (SPONTANEOUS) 9

Don’t know (DO NOT READ OUT) 98

IF DX1_1=1 and (Q7_1 AND Q7_2 > 2)

IF DX1_1<>1 and Q7_1> 2 (Did not switch energy provider in the past three years)

Q8b IF CY AND MT, ASK: Suppose that the electricity market opens up and you can choose between multiple electricity providers. How would you inform yourself if you were choosing an energy provider? You can give up to three responses.

IF ANY OTHER COUNTRY, ASK: How would you inform yourself if you were choosing an energy provider? You can give up to three responses.

(READ OUT; MAX 3 ANSWERS)

In-person recommendations from friends, family or colleagues 1

Recommendations on social media 2

Ads from energy providers, for instance in the media or online 3

News coverage about energy providers 4

Directly on the website of energy providers 5

Price comparison websites 6

Reviews from consumer organisations 7

Official information or campaigns from public authorities 8

Other (SPONTANEOUS) 9

Don’t know (DO NOT READ OUT) 98

IF Q7_1 or Q7_2 =1 or 2 (Switched energy provider in the past three years)

Q9a What were the primary reasons for your most recent decision to switch energy providers?

You can give up to three responses.

(READ OUT; MAX 3 ANSWERS)

(RANDOMISE ITEMS 1-8)

You found an offer with a better price 1

You moved house 2

You wanted a more environmentally-friendly energy provider 3

Because of poor customer service 4

You had experienced billing problems 5

Because of recommendations from family, friends or colleagues 6

You had been contacted by another energy provider 7

To benefit from extra services another energy provider provides, like offering home insulation or other energy efficiency measures 8

Other (SPONTANEOUS) 9

Don’t know (DO NOT READ OUT) 98

IF DX1_1=1 and (Q7_1 AND Q7_2 > 2)

IF DX1_1<>1 and Q7_1> 2 (Did not switch energy provider in the past three years)

DO NOT ASK IN CY AND MT

Q9b What are the main reasons that stopped you from switching energy provider in the past three years?

You can give up to three responses.

(READ OUT; MAX 3 ANSWERS)

(RANDOMISE ITEMS 1-9)

You think it is difficult to find information of other providers 1

You think switching is too complicated or too time-consuming 2

You are worried about interruptions or technical difficulties arising from switching providers 3

You cannot switch because you are locked into a contract, and you are not willing to pay a penalty for switching 4

You don’t think there is any difference between energy providers to make switching worthwhile 5

It is difficult to compare offers of different energy providers 6

You did not know that you can switch 7

You cannot find information on how to switch 8

You are satisfied with the reliability, service and price of your current energy provider 9

Other (SPONTANEOUS) 10

You never thought about switching (SPONTANEOUS) 11

Don’t know (DO NOT READ OUT) 98

IF Q7_1 or Q7_2 =1 or 2 (Switched energy provider in the past three years)

Q10a When you most recently switched energy providers, which factors, beside price, were most important in your choice?

You can give up to three responses.

(READ OUT; MAX 3 ANSWERS)

(RANDOMISE ITEMS 1-6)

Reputation of the provider 1

Quality of service 2

Duration of the contract 3

Energy provider is owned or managed locally 4

Private or public ownership of the company 5

Sustainable energy sources in the provider’s mix 6

Other (SPONTANEOUS) 7

Don’t know (DO NOT READ OUT) 98

IF DX1_1=1 and (Q7_1 AND Q7_2 > 2)

IF DX1_1<>1 and Q7_1> 2 (Did not switch energy provider in the past three years)

Q10b IF CY AND MT, ASK: If you could switch energy provider, aside from price, what factor would be most important in your decision? You can give up to three responses. IF ANY OTHER COUNTRY, ASK: If you were to switch energy provider, aside from price, what factor would be most important in your decision?

You can give up to three responses.

(READ OUT; MAX 3 ANSWERS)

(RANDOMISE ITEMS 1-6)

Reputation of the provider 1

Quality of service 2

Duration of the contract 3

Energy provider is owned or managed locally 4

Private or public ownership of the company 5

Sustainable energy sources in the provider’s mix 6

Other (SPONTANEOUS) 7

Don’t know (DO NOT READ OUT) 98

ASK ALL

Q11 What would motivate you to change your energy consumption behaviour at home in the following ways?

(READ OUT; ONE ANSWER PER LINE)

Q11_1 Lower your heating or air conditioning use

Q11_2 Run appliances like washing machines and dishwashers during off-peak hours (when electricity demand is lower)

Q11_3 Use smart devices to automatically schedule using your appliances during off-peak hours (when electricity demand is lower)

(RESPONSE SCALE)

Only economic reasons 1

Mostly economic reasons, somewhat for environmental reasons 2

Mostly environmental reasons, somewhat for economic reasons 3

Only environmental reasons 4

You would not change your behaviour (SPONTANEOUS) 5

Don't know (DO NOT READ OUT) 98

ASK ALL

DX4 Which of the following situations applies to you?

(READ OUT; ONE ANSWER ONLY)

You can always afford paying your energy bills 1

You worry about being able to pay your energy bills but usually manage to do so 2

You sometimes cannot pay your energy bills on time 3

You often cannot pay your energy bills on time 4

Don't know / Refused (DO NOT READ OUT) 98

Data annex

Q1_1 How much do you trust the following to provide fair prices and reliable service?
The energy market

	Trust a lot	Tend to trust	Tend not to trust	Do not trust at all	Don't know
EU27	13	50	20	15	2
BE	10	60	19	8	3
BG	13	27	17	40	3
CZ	6	56	25	10	2
DK	20	48	19	8	5
DE	18	50	22	7	4
EE	12	59	17	9	3
IE	22	50	12	14	3
EL	9	31	23	36	1
ES	10	31	25	34	0
FR	14	61	7	17	1
HR	9	49	18	19	5
IT	8	40	35	15	2
CY	12	41	24	22	1
LV	8	58	16	10	8
LT	9	57	19	12	2
LU	34	63	2	1	0
HU	19	42	23	15	2
MT	33	47	9	10	0
NL	32	45	15	8	0
AT	16	60	18	6	0
PL	8	68	16	7	1
PT	15	72	6	5	1
RO	8	50	25	15	1
SI	11	49	28	11	1
SK	11	67	14	4	3
FI	14	65	11	3	6
SE	14	59	15	12	1

flash Eurobarometer 566 - Consumer behaviour in the energy transition
Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q1_2 How much do you trust the following to provide fair prices and reliable service?

Your electricity and gas providers/Your electricity provider

	Trust a lot	Tend to trust	Tend not to trust	Do not trust at all	Don't know
EU27	25	54	12	8	1
BE	21	62	12	4	1
BG	20	43	4	30	3
CZ	18	66	12	3	1
DK	40	44	9	5	2
DE	25	56	13	3	3
EE	19	66	8	5	3
IE	37	48	6	9	1
EL	18	47	15	19	0
ES	20	41	19	19	0
FR	31	60	2	7	0
HR	15	54	16	11	4
IT	17	53	20	9	1
CY	14	44	20	22	0
LV	17	61	11	6	5
LT	10	65	14	9	1
LU	31	62	3	3	2
HU	20	50	19	10	1
MT	30	49	18	4	0
NL	42	42	8	9	0
AT	26	55	15	4	0
PL	37	52	6	4	1
PT	18	72	3	4	3
RO	13	58	20	9	0
SI	19	59	16	6	1
SK	21	70	6	2	1
FI	26	64	6	2	1
SE	30	55	9	6	0

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their householdsehold

Q2_1 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

It is easy to get in contact with your energy provider when you need assistance or information

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	42	36	10	7	5
BE	34	42	12	6	6
BG	50	18	8	19	6
CZ	53	36	5	3	4
DK	43	25	6	6	19
DE	46	36	8	5	5
EE	41	34	10	4	11
IE	45	43	8	2	2
EL	48	31	11	7	3
ES	27	40	18	12	3
FR	53	32	6	3	5
HR	20	42	18	15	4
IT	49	28	10	9	5
CY	31	23	22	19	4
LV	46	33	8	3	10
LT	40	36	11	7	7
LU	58	29	5	4	5
HU	29	34	21	13	3
MT	29	40	23	8	0
NL	64	22	6	2	5
AT	48	37	4	7	4
PL	13	63	12	8	4
PT	41	42	7	8	3
RO	36	33	21	9	1
SI	29	54	7	3	6
SK	50	40	8	2	1
FI	48	34	7	2	9
SE	53	30	4	4	9

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q2_2 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

Your energy bills are easy to understand

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	43	34	11	10	1
BE	39	39	13	8	1
BG	40	28	8	23	1
CZ	42	39	11	6	1
DK	43	29	11	12	5
DE	50	36	8	4	2
EE	50	34	9	5	2
IE	52	35	7	5	1
EL	39	29	17	14	1
ES	27	35	16	20	1
FR	51	43	5	2	0
HR	27	44	17	11	2
IT	35	41	12	12	1
CY	31	27	23	19	0
LV	57	31	7	2	2
LT	59	27	8	5	1
LU	51	44	2	3	0
HU	35	25	20	19	1
MT	53	31	8	9	0
NL	71	5	11	11	2
AT	41	33	18	8	1
PL	35	23	17	23	2
PT	53	30	4	11	3
RO	38	35	16	10	0
SI	23	57	13	6	1
SK	46	40	11	3	1
FI	69	22	5	2	1
SE	55	31	8	6	1

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q2_3 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

Your energy provider provides easy-to-understand information about offers and promotions

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	32	39	15	10	4
BE	25	39	21	10	4
BG	30	10	12	45	4
CZ	35	46	12	4	3
DK	33	31	10	10	17
DE	37	41	14	4	5
EE	29	36	17	8	10
IE	35	47	9	8	1
EL	28	41	19	9	3
ES	19	35	22	19	4
FR	35	44	11	7	3
HR	17	48	19	9	6
IT	31	36	17	12	4
CY	16	29	23	22	11
LV	36	35	11	6	11
LT	38	40	13	7	3
LU	46	42	7	3	2
HU	24	31	20	16	8
MT	22	39	18	19	1
NL	57	23	7	10	3
AT	32	41	19	8	1
PL	21	45	20	12	2
PT	38	45	6	9	2
RO	33	43	16	8	0
SI	18	57	13	6	6
SK	30	50	14	4	3
FI	37	43	13	4	3
SE	35	44	10	8	3

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q2_4 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

Your energy provider is investing sufficiently in renewable energy sources

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	24	41	15	6	13
BE	21	42	12	5	20
BG	23	18	16	35	9
CZ	15	35	8	2	40
DK	21	29	6	3	42
DE	29	36	10	3	22
EE	14	36	7	4	39
IE	28	44	15	6	7
EL	21	36	16	6	22
ES	18	44	23	12	3
FR	31	50	9	6	4
HR	8	34	23	11	24
IT	25	42	17	5	11
CY	11	18	24	31	15
LV	15	28	8	3	46
LT	21	42	11	6	20
LU	39	47	8	1	5
HU	13	25	20	11	31
MT	23	42	13	19	2
NL	53	25	6	8	9
AT	39	39	7	2	11
PL	7	48	29	6	10
PT	34	45	6	5	11
RO	15	46	20	6	12
SI	11	45	14	7	24
SK	15	46	13	3	23
FI	33	41	7	1	18
SE	27	42	9	4	18

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q3_1 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

Energy consumers in [YOUR COUNTRY] are well protected (for instance, against unfair practices or disconnection

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	19	43	19	13	6
BE	16	50	16	8	9
BG	13	19	20	47	2
CZ	17	49	16	6	13
DK	14	33	19	13	21
DE	22	42	18	6	13
EE	14	48	21	10	7
IE	27	53	13	5	2
EL	11	25	24	36	4
ES	11	36	21	30	2
FR	24	53	16	5	2
HR	16	42	21	15	6
IT	16	40	18	22	4
CY	12	26	27	29	6
LV	15	37	20	10	19
LT	13	46	26	10	5
LU	38	52	3	6	2
HU	21	36	22	11	10
MT	27	32	32	8	0
NL	40	39	11	8	2
AT	22	55	17	3	3
PL	12	53	24	8	4
PT	17	48	21	13	2
RO	20	37	25	16	3
SI	9	48	25	8	10
SK	18	49	18	3	12
FI	16	49	21	7	7
SE	15	44	20	12	9

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household)

Q3_2 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

If you believe you are being treated unfairly by your energy provider, you are aware of which national authorities you can turn to for assistance

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	28	30	19	19	5
BE	19	29	19	26	7
BG	34	14	9	42	1
CZ	32	33	19	9	8
DK	12	14	13	53	8
DE	22	19	26	20	12
EE	25	31	18	19	6
IE	37	34	10	17	2
EL	28	20	16	32	4
ES	29	32	19	19	1
FR	21	37	19	21	2
HR	20	31	17	22	10
IT	33	32	17	15	4
CY	14	12	17	41	16
LV	25	19	10	20	26
LT	23	31	23	18	6
LU	39	43	7	9	3
HU	32	24	15	25	4
MT	30	39	15	14	2
NL	41	20	17	20	2
AT	36	26	23	11	5
PL	30	47	15	8	1
PT	39	33	18	8	2
RO	38	33	18	9	2
SI	9	36	20	26	9
SK	21	34	27	12	6
FI	23	29	23	21	4
SE	13	24	19	41	3

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q3_3 How much do you agree or disagree with the following statements about your electricity and gas providers/your electricity provider?

You would trust an energy provider more if they committed to an officially certified code of practice on consumer rights

	Totally agree	Tend to agree	Tend to disagree	Totally disagree	Don't know
EU27	49	33	7	6	4
BE	43	40	10	5	3
BG	47	19	3	20	11
CZ	34	42	8	3	12
DK	42	29	8	7	14
DE	32	39	13	5	10
EE	30	44	6	3	17
IE	49	41	7	2	1
EL	59	26	6	7	1
ES	54	33	3	10	1
FR	49	37	6	8	0
HR	38	41	9	6	6
IT	66	26	5	2	0
CY	55	30	5	4	6
LV	44	33	6	2	15
LT	47	39	7	1	6
LU	54	34	9	4	0
HU	44	36	7	5	8
MT	46	43	6	5	0
NL	60	19	7	10	4
AT	43	31	17	6	3
PL	48	31	6	6	9
PT	53	37	5	2	4
RO	57	33	6	4	0
SI	25	54	13	5	3
SK	48	42	4	2	4
FI	50	31	6	3	8
SE	48	33	8	7	4

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q4 To make the energy market in [YOUR COUNTRY] work better for consumers, which of the following areas most need improvement? You can give up to two responses. [MULTIPLE ANSWERS]

	Better protection of vulnerable consumers and those in energy poverty	More clarity and transparency of energy bills	More prevention of unfair commercial practices (e.g. telemarketing)	Better access to energy data and digital tools to monitor and adapt your energy consumption	Easier switching between energy providers	Other (spontaneous)	Don’t know
EU27	38	34	34	28	21	3	2
BE	48	41	42	29	21	2	2
BG	27	24	36	7	22	9	2
CZ	47	30	37	28	19	5	4
DK	33	39	37	27	10	4	6
DE	27	41	25	35	22	6	5
EE	42	30	21	18	28	8	8
IE	27	26	22	32	36	2	3
EL	51	46	44	24	12	3	0
ES	42	32	37	33	15	2	0
FR	36	21	38	30	25	2	2
HR	43	30	29	28	19	3	5
IT	44	35	38	21	20	2	1
CY	71	49	24	41	-	0	0
LV	37	19	28	26	17	4	8
LT	24	23	39	34	35	1	4
LU	38	27	17	32	30	2	0
HU	38	43	30	25	21	3	5
MT	38	36	25	48	-	4	1
NL	50	34	38	8	16	1	0
AT	35	37	24	26	19	7	3
PL	27	39	29	29	24	1	0
PT	39	45	22	35	14	1	2
RO	55	48	27	31	25	1	0
SI	34	27	40	30	19	2	3
SK	49	26	42	35	21	2	2
FI	52	20	34	21	25	3	5
SE	37	26	33	32	24	4	3

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q5_1 How often do you track your energy consumption? Specifically… your electricity consumption

	Multiple times a week	At least once a week	At least once a month	At least two times a year	At least once a year	Less than once a year	Never	Don't know
EU27	6	7	40	20	14	3	10	0
BE	7	8	33	21	20	2	9	0
BG	1	1	65	1	3	2	27	1
CZ	5	4	32	27	20	2	9	1
DK	13	7	41	20	7	1	10	1
DE	5	6	24	20	38	3	3	1
EE	22	9	49	6	1	1	11	0
IE	5	7	37	20	11	6	14	0
EL	3	5	59	10	4	5	14	0
ES	2	10	61	12	3	4	7	0
FR	4	9	40	20	19	1	6	0
HR	3	4	50	16	4	2	21	1
IT	10	5	36	28	3	5	14	1
CY	3	6	38	25	6	4	18	0
LV	10	9	62	5	4	1	8	1
LT	7	9	68	4	2	1	9	0
LU	4	2	20	37	21	10	6	0
HU	4	4	59	16	11	1	5	1
MT	2	1	52	19	6	1	19	0
NL	13	8	42	7	14	1	13	2
AT	12	6	16	26	25	2	14	0
PL	5	6	18	36	9	6	20	0
PT	2	4	61	14	5	2	11	0
RO	5	10	73	3	2	1	7	0
SI	8	6	62	6	3	2	12	0
SK	2	4	29	26	22	3	13	0
FI	18	12	45	13	4	3	4	0
SE	12	8	41	19	9	5	6	0

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q5_2 How often do you track your energy consumption? Specifically… your gas consumption

	Multiple times a week	At least once a week	At least once a month	At least two times a year	At least once a year	Less than once a year	Never	Don't know
EU27	3	5	38	21	17	3	12	1
BE	4	5	29	26	22	3	11	0
BG	0	7	56	7	6	0	21	3
CZ	1	3	26	28	25	4	12	2
DK	2	2	35	34	7	0	19	1
DE	2	5	19	19	38	3	11	3
EE	12	8	46	4	3	2	22	4
IE	4	3	35	32	9	2	15	0
EL	1	3	49	18	7	4	18	0
ES	2	2	46	35	7	4	3	0
FR	5	16	32	27	5	2	12	0
HR	1	2	54	15	4	2	21	2
IT	4	2	39	25	8	5	16	2
CY	-	-	-	-	-	-	-	-
LV	1	2	73	7	3	1	11	2
LT	2	3	73	6	5	0	11	0
LU	7	1	13	25	31	8	17	0
HU	1	4	52	17	15	1	10	1
MT	-	-	-	-	-	-	-	-
NL	7	6	42	6	22	1	16	0
AT	2	5	10	22	28	3	27	3
PL	3	7	38	19	21	1	11	0
PT	1	2	72	10	6	0	9	0
RO	1	6	74	5	2	1	9	0
SI	2	2	47	12	6	1	27	3
SK	1	3	24	26	27	4	15	1
FI	3	11	6	11	2	0	56	11
SE	0	0	14	18	1	24	41	2

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=7 720 – Respondents with a connection to the natural gas grid (and involved in energy decisions in their household)

Note: question not asked in CY/MT

Q6 Which parts of your electricity and gas bills/ your electricity bills, if any, do you find most difficult to understand? You can give up to two responses. [MULTIPLE ANSWERS]

	The cost for each unit of energy you consume	Taxes and charges for maintaining the energy infrastructure	The calculation of the total amount to be paid	The contract duration early termination fees, and what happens when the contract period ends	None, you understand all parts	All of them (spontaneous)	You don't read your energy bill (spontaneous)	Don’t know
EU27	16	36	16	16	33	4	3	2
BE	26	40	18	22	27	2	3	1
BG	6	17	16	7	35	17	10	0
CZ	17	36	16	15	37	2	2	2
DK	15	34	19	10	30	4	7	2
DE	19	30	16	13	37	3	2	5
EE	9	37	11	11	41	3	4	3
IE	12	16	16	21	41	5	6	4
EL	19	46	18	14	30	2	1	0
ES	15	31	16	26	32	4	1	3
FR	11	37	10	12	42	2	4	3
HR	15	30	18	9	38	3	4	3
IT	19	50	12	27	18	2	2	1
CY	25	46	21	10	28	3	5	1
LV	6	23	5	4	54	1	8	2
LT	9	25	16	16	48	1	2	2
LU	11	22	18	14	43	1	0	3
HU	18	38	21	5	34	5	4	1
MT	24	12	24	13	40	2	2	1
NL	10	34	20	15	37	2	2	2
AT	13	29	18	19	37	3	3	5
PL	18	38	10	9	28	12	11	0
PT	18	41	19	13	30	2	5	0
RO	25	41	43	21	26	1	1	1
SI	15	35	11	9	38	2	7	1
SK	22	30	23	12	40	0	4	1
FI	6	22	7	12	58	2	2	2
SE	14	41	10	16	39	1	1	1

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q7_1 When was the last time your household switched …? Electricity provider

	Less than 1 year ago	Between 1 and 3 years ago	Over 3 to 5 years ago	Over 5 to 10 years ago	More than 10 years ago	Never	Don't know
EU27	18	20	14	10	11	25	2
BE	19	23	15	11	11	20	1
BG	1	0	1	2	8	81	5
CZ	15	17	18	11	13	24	1
DK	21	19	13	11	9	24	3
DE	24	24	10	8	12	17	4
EE	14	26	14	10	6	28	2
IE	33	19	9	9	10	19	2
EL	23	19	7	5	4	41	1
ES	20	35	15	8	11	7	5
FR	10	10	19	11	13	36	2
HR	3	6	5	4	5	75	2
IT	32	24	17	15	7	4	0
CY	-	-	-	-	-	-	-
LV	6	18	13	9	9	41	3
LT	12	32	17	5	4	27	2
LU	6	15	8	3	24	43	2
HU	2	7	7	5	6	68	4
MT	-	-	-	-	-	-	-
NL	23	15	14	12	19	15	2
AT	14	19	4	5	9	47	1
PL	6	10	17	12	11	43	0
PT	14	20	9	7	10	37	3
RO	9	20	13	6	5	47	1
SI	4	15	16	19	16	29	2
SK	3	6	15	16	10	48	2
FI	25	34	12	9	10	10	1
SE	18	30	17	14	10	10	1

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Note: question not asked in CY/MT (as switching is not possible)

Q7_2 When was the last time your household switched …? Gas provider

	Less than 1 year ago	Between 1 and 3 years ago	Over 3 to 5 years ago	Over 5 to 10 years ago	More than 10 years ago	Never	Don't know
EU27	16	17	14	12	12	26	3
BE	20	23	16	12	9	19	2
BG	13	9	13	13	8	44	0
CZ	13	15	18	14	16	20	3
DK	4	15	11	9	8	43	10
DE	20	22	11	6	11	23	8
EE	6	10	5	12	7	51	9
IE	33	25	5	10	12	13	2
EL	22	11	14	3	2	46	2
ES	8	26	20	12	19	12	3
FR	23	7	32	6	13	20	0
HR	14	12	5	1	2	64	1
IT	24	21	15	17	10	11	1
CY	-	-	-	-	-	-	-
LV	4	17	5	6	6	58	3
LT	4	7	4	6	10	66	2
LU	9	19	4	7	20	41	0
HU	2	3	5	6	7	72	5
MT	-	-	-	-	-	-	-
NL	18	16	9	12	21	17	6
AT	7	20	2	11	15	43	2
PL	8	13	9	22	9	39	0
PT	12	28	6	14	18	20	1
RO	3	12	11	4	5	64	1
SI	4	8	14	15	13	43	3
SK	2	5	13	17	10	51	3
FI	8	6	9	0	8	52	17
SE	8	11	9	20	11	29	13

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=7 720 – Respondents with a connection to the natural gas grid (and involved in energy decisions in their household)

Note: question not asked in CY/MT

Q8a How did you inform yourself when choosing your current energy providers/energy provider? You can give up to three responses. [MULTIPLE ANSWERS]

	In-person recommendations from friends, family or colleagues	Recommendations on social media	Ads from energy providers, for instance in the media or online	News coverage about energy providers	Directly on the website of energy providers	Price comparison websites	Reviews from consumer organisations	Official information or campaigns from public authorities	Other (spontaneous)	Don't know
EU27	25	9	17	7	34	34	12	9	13	1
BE	19	5	12	13	33	63	19	18	9	1
BG	49	5	5	9	53	27	14	6	3	0
CZ	32	2	15	7	39	35	9	8	19	1
DK	23	7	15	2	24	21	9	4	33	1
DE	21	20	20	5	29	54	8	4	9	0
EE	35	6	14	4	41	46	2	3	9	2
IE	15	5	13	2	35	53	12	3	8	0
EL	37	10	23	6	24	19	5	6	20	0
ES	27	3	18	4	39	21	7	11	16	0
FR	20	6	24	4	38	21	24	8	6	0
HR	32	8	16	13	17	10	8	17	19	4
IT	30	5	11	10	31	20	8	13	20	2
CY	-	-	-	-	-	-	-	-	-	-
LV	25	8	21	3	23	24	1	3	14	0
LT	38	16	27	10	33	42	8	14	3	0
LU	21	23	8	8	42	28	11	17	3	0
HU	24	12	11	6	14	14	3	15	22	12
MT	-	-	-	-	-	-	-	-	-	-
NL	16	18	17	12	42	50	30	6	0	0
AT	22	10	26	5	18	52	5	13	14	2
PL	8	2	11	1	49	36	21	4	14	0
PT	36	4	17	7	28	45	5	9	11	0
RO	50	15	21	20	38	35	12	27	3	2
SI	51	14	21	2	12	19	6	7	8	3
SK	36	13	21	2	35	31	11	13	15	1
FI	23	6	14	3	45	55	2	4	7	1
SE	25	4	12	2	30	44	8	5	17	2

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

Note: question not asked in CY/MT

Q8b How would you inform yourself if you were choosing an energy provider? You can give up to three responses. [MULTIPLE ANSWERS]

	In-person recommendations from friends, family or colleagues	Recommendations on social media	Ads from energy providers, for instance in the media or online	News coverage about energy providers	Directly on the website of energy providers	Price comparison websites	Reviews from consumer organisations	Official information or campaigns from public authorities	Other (spontaneous)	Don't know
EU27	46	8	13	10	33	34	17	18	6	2
BE	44	5	12	22	38	54	28	28	2	3
BG	46	11	9	3	26	26	7	14	3	2
CZ	54	8	10	11	44	34	21	17	5	1
DK	40	7	6	8	31	44	28	12	5	4
DE	45	19	24	9	28	35	14	13	3	4
EE	43	7	13	10	47	46	4	9	5	4
IE	56	9	19	13	15	24	6	8	4	3
EL	47	11	14	4	33	23	20	23	4	5
ES	53	5	7	7	48	44	25	7	0	0
FR	43	3	11	16	30	25	12	14	16	2
HR	54	12	12	6	21	15	18	15	6	6
IT	52	1	13	10	43	35	22	19	8	0
CY	57	27	27	20	35	30	23	29	2	0
LV	39	16	16	5	22	31	5	11	5	4
LT	46	18	17	8	35	41	7	20	2	0
LU	45	1	5	5	18	23	37	39	8	0
HU	43	16	15	9	32	35	14	18	4	2
MT	44	26	17	10	27	28	24	25	6	3
NL	36	3	18	3	32	29	34	12	0	2
AT	62	12	9	2	24	36	26	19	0	3
PL	38	2	8	5	25	36	6	25	7	0
PT	40	9	11	8	17	35	26	22	9	4
RO	51	16	20	18	37	37	20	37	3	1
SI	55	10	15	4	29	32	20	18	2	1
SK	56	12	11	8	47	40	34	21	3	2
FI	29	6	11	11	47	44	7	8	4	6
SE	43	4	10	7	43	47	28	17	1	0

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Q9a What were the primary reasons for your most recent decision to switch energy providers? You can give up to three responses. [MULTIPLE ANSWERS]

	You found an offer with a better price	You moved house	Because of recommendations from family, friends or colleagues	You wanted a more environmentally-friendly energy provider	You had experienced billing problems	Because of poor customer service	You had been contacted by another energy provider	To benefit from extra services another energy provider provides, like offering home insulation or other energy efficiency measures	Other (spontaneous)	Don't know
EU27	68	18	13	11	10	8	7	5	9	1
BE	72	25	14	32	14	14	11	7	6	1
BG	69	14	10	4	26	3	4	20	0	0
CZ	68	17	14	5	5	9	16	6	13	0
DK	41	26	9	8	6	13	5	11	18	1
DE	64	15	8	22	4	7	4	7	9	3
EE	66	20	10	6	2	3	7	4	12	2
IE	83	6	14	16	7	8	8	9	0	0
EL	67	14	18	3	27	20	19	3	2	0
ES	72	15	12	6	15	4	8	2	0	0
FR	75	14	10	4	11	7	2	4	19	0
HR	26	18	15	7	5	6	15	3	29	3
IT	63	17	17	5	11	5	6	2	15	0
CY	-	-	-	-	-	-	-	-	-	-
LV	67	18	7	4	2	1	12	5	8	0
LT	59	14	21	14	5	6	8	6	11	1
LU	55	16	11	21	4	5	14	1	10	0
HU	9	43	13	1	2	3	21	1	20	1
MT	-	-	-	-	-	-	-	-	-	-
NL	69	28	14	12	6	17	4	12	12	0
AT	75	12	10	22	8	6	2	4	9	4
PL	77	25	12	11	13	9	5	1	2	0
PT	85	30	24	7	5	11	12	8	0	0
RO	69	22	34	16	23	20	21	8	7	0
SI	62	10	25	9	0	4	6	10	11	1
SK	50	27	9	20	13	9	13	11	10	0
FI	72	23	3	13	2	5	8	4	8	1
SE	55	26	10	17	4	4	10	7	9	0

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

Note: question not asked in CY/MT

Q9b What are the main reasons that stopped you from switching energy provider in the past three years? You can give up to three responses. [MULTIPLE ANSWERS]

	You found an offer with a better price	You moved house	Because of recommendations from family, friends or colleagues	You wanted a more environmentally-friendly energy provider	You had experienced billing problems	Because of poor customer service	You had been contacted by another energy provider	To benefit from extra services another energy provider provides, like offering home insulation or other energy efficiency measures	Other (spontaneous)	Don't know
EU27	52	26	15	13	10	8	6	6	4	7
BE	71	29	30	23	13	6	2	8	6	3
BG	25	13	1	6	2	4	17	1	11	20
CZ	74	35	15	15	3	15	3	5	1	3
DK	61	16	9	12	2	2	1	5	1	8
DE	62	11	8	10	4	3	7	2	3	10
EE	58	45	6	6	1	9	2	3	3	7
IE	45	22	20	10	5	26	4	6	2	7
EL	46	45	13	14	12	6	0	5	2	5
ES	50	31	10	10	8	8	5	3	3	9
FR	63	16	15	11	13	6	7	4	6	11
HR	34	31	8	14	13	4	6	10	4	8
IT	57	42	26	6	13	4	7	4	4	6
CY	-	-	-	-	-	-	-	-	-	-
LV	55	28	8	5	2	4	0	2	1	5
LT	55	50	16	11	9	10	1	2	3	2
LU	45	13	7	16	7	6	4	6	16	13
HU	33	22	10	13	7	5	21	9	7	12
MT	-	-	-	-	-	-	-	-	-	-
NL	60	26	6	18	0	3	2	4	2	6
AT	48	31	10	19	13	11	3	8	5	1
PL	19	31	25	19	13	18	6	10	2	2
PT	56	20	1	13	7	5	5	2	13	6
RO	47	50	21	28	21	17	4	19	10	3
SI	63	29	10	8	6	4	1	5	2	3
SK	69	38	14	16	14	5	2	6	4	3
FI	68	34	9	11	4	9	1	5	1	4
SE	73	31	16	19	3	7	2	3	1	3

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Note: question not asked in CY/MT

Q10a When you most recently switched energy providers, which factors, beside price, were most important in your choice? You can give up to three responses. [MULTIPLE ANSWERS]

	Quality of service	Reputation of the provider	Sustainable energy sources in the provider's mix	Duration of the contract	Energy provider is owned or managed	Private or public ownership of the company	Other (spontaneous)	Don't know
EU27	36	34	27	23	14	8	13	2
BE	44	42	46	27	12	7	12	6
BG	28	43	15	30	10	0	20	0
CZ	54	55	14	31	12	5	9	3
DK	28	34	23	9	8	5	30	7
DE	40	28	33	35	21	13	7	4
EE	29	28	13	23	7	11	21	10
IE	33	28	21	31	13	6	14	2
EL	37	33	16	18	4	14	16	8
ES	37	33	14	12	14	6	13	0
FR	31	28	25	21	7	15	34	0
HR	33	14	10	9	20	7	29	8
IT	35	34	27	16	13	1	16	3
CY	-	-	-	-	-	-	-	-
LV	27	28	13	22	5	4	22	3
LT	36	35	20	36	6	19	9	6
LU	35	33	21	12	23	17	0	0
HU	25	8	25	13	7	15	34	10
MT	-	-	-	-	-	-	-	-
NL	23	53	35	35	14	2	0	0
AT	16	30	35	20	21	5	17	1
PL	48	41	32	24	6	3	2	1
PT	55	24	33	24	13	8	0	2
RO	58	54	25	30	20	27	7	2
SI	40	20	18	11	8	5	19	8
SK	55	49	26	19	7	10	11	2
FI	19	26	30	32	15	5	11	7
SE	22	23	37	21	16	4	18	3

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=6 703 – Respondents who switched within the last three years (involved in energy decisions in their household)

Note: question not asked in CY/MT

Q10b If you were to switch energy provider, aside from price, what factor would be most important in your decision? You can give up to three responses. [MULTIPLE ANSWERS]

	Quality of service	Reputation of the provider	Sustainable energy sources in the provider's mix	Duration of the contract	Energy provider is owned or managed	Private or public ownership of the company	Other (spontaneous)	Don't know
EU27	52	38	28	21	20	15	7	3
BE	70	53	47	33	20	10	3	5
BG	60	34	5	9	12	7	4	2
CZ	60	53	20	27	9	12	5	5
DK	39	38	41	11	16	11	11	5
DE	48	28	32	27	34	15	9	6
EE	55	37	16	19	15	12	8	8
IE	46	34	15	20	19	13	6	3
EL	47	29	20	13	12	27	5	7
ES	52	42	25	23	9	30	0	0
FR	44	36	27	19	26	12	16	0
HR	55	20	31	10	12	8	6	9
IT	54	36	37	19	20	13	4	4
CY	71	38	44	25	20	23	4	1
LV	40	34	14	20	6	14	9	10
LT	51	44	18	25	8	23	6	1
LU	52	51	30	9	42	24	0	2
HU	62	17	28	12	14	25	6	6
MT	78	37	45	8	30	16	1	0
NL	48	48	27	3	11	15	0	1
AT	45	30	35	21	29	13	4	2
PL	50	54	19	29	12	7	8	0
PT	65	13	38	15	6	14	4	1
RO	74	48	31	36	22	17	3	2
SI	57	16	22	15	10	6	11	6
SK	71	52	39	21	16	17	5	3
FI	40	37	31	19	33	8	4	4
SE	42	27	50	18	29	8	5	2

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=11 547 – Respondents who did not switch in the last three years (involved in energy decisions in their household)

Q11_1 What would motivate you to change your energy consumption behaviour at home in the following ways?

Lower your heating or air conditioning use

	Only economic reasons	Mostly economic reasons, somewhat for environmental reasons	Mostly environmental reasons, somewhat for economic reasons	Only environmental reasons	You would not change your behaviour (spontaneous)	Don’t know
EU27	28	37	15	10	8	2
BE	27	37	19	8	8	2
BG	37	29	11	12	9	1
CZ	35	37	10	7	8	3
DK	20	42	22	6	10	1
DE	19	25	17	21	12	5
EE	54	24	5	3	13	2
IE	21	41	15	16	4	3
EL	30	46	15	4	5	1
ES	32	41	14	7	5	0
FR	26	43	6	7	13	4
HR	28	30	16	8	14	3
IT	25	39	25	5	4	2
CY	36	46	8	2	8	0
LV	42	20	6	5	22	5
LT	34	31	12	11	8	4
LU	8	52	26	8	5	1
HU	23	38	23	8	8	1
MT	18	38	23	15	1	4
NL	31	29	19	9	10	2
AT	29	26	16	16	12	0
PL	37	50	5	5	1	2
PT	40	33	10	9	6	1
RO	40	34	11	9	4	2
SI	25	33	14	10	17	1
SK	33	38	14	6	8	2
FI	33	36	12	5	13	1
SE	23	39	19	11	8	1

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q11_2 What would motivate you to change your energy consumption behaviour at home in the following ways? Run appliances like washing machines and dishwashers during off-peak hours (when electricity demand is lower)

	Only economic reasons	Mostly economic reasons, somewhat for environmental reasons	Mostly environmental reasons, somewhat for economic reasons	Only environmental reasons	You would not change your behaviour (spontaneous)	Don’t know
EU27	32	29	12	12	12	2
BE	40	27	15	6	9	2
BG	32	27	6	11	22	2
CZ	45	27	8	6	10	4
DK	31	32	15	6	15	2
DE	17	21	15	21	19	7
EE	54	16	4	2	23	1
IE	37	39	11	6	5	2
EL	31	40	15	6	8	1
ES	45	23	11	9	11	1
FR	34	42	6	13	5	0
HR	38	24	10	7	18	4
IT	29	35	19	8	8	1
CY	34	46	8	3	8	1
LV	39	14	4	3	35	5
LT	44	23	10	6	14	4
LU	14	54	22	6	3	0
HU	18	27	21	11	19	4
MT	39	17	21	16	5	2
NL	21	25	17	17	15	5
AT	32	22	7	14	22	2
PL	41	22	4	11	22	0
PT	31	35	10	11	8	4
RO	37	32	14	11	5	1
SI	34	29	10	5	22	1
SK	38	29	12	5	14	3
FI	40	25	8	5	20	3
SE	30	31	16	11	10	2

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household

Q11_3 What would motivate you to change your energy consumption behaviour at home in the following ways? Use smart devices to automatically schedule using your appliances during off-peak hours (when electricity demand is lower)

	Only economic reasons	Mostly economic reasons, somewhat for environmental reasons	Mostly environmental reasons, somewhat for economic reasons	Only environmental reasons	You would not change your behaviour (spontaneous)	Don’t know
EU27	27	31	11	9	14	8
BE	33	28	13	7	13	6
BG	33	25	9	12	11	9
CZ	38	28	8	4	11	11
DK	25	30	13	6	22	5
DE	17	19	13	17	19	15
EE	37	12	4	2	35	10
IE	24	32	10	11	12	12
EL	29	38	16	4	10	3
ES	38	30	6	8	15	3
FR	42	32	4	6	8	7
HR	30	24	11	7	20	9
IT	20	40	20	6	9	5
CY	30	49	8	2	8	4
LV	34	13	4	3	37	9
LT	45	26	10	5	9	5
LU	13	52	15	11	7	3
HU	15	29	18	10	22	6
MT	32	25	23	11	7	1
NL	17	24	20	14	13	12
AT	21	26	7	12	25	8
PL	15	45	5	3	20	11
PT	39	26	13	7	10	5
RO	32	38	13	9	4	3
SI	29	27	8	5	24	7
SK	31	33	13	5	15	4
FI	32	21	8	4	30	6
SE	28	31	16	8	13	5

flash Eurobarometer 566 - Consumer behaviour in the energy transition

Fieldwork: 30.6-15.7.2025 / (%) Base: n=18 250 - Respondents involved in making decisions about energy providers in their household