



The human side of the energy transition

Building trust, confidence
and participation

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Foreword

Australia is at a pivotal moment in its energy transition. The shift to renewable energy is no longer a question of *if*, but *how* – and the choices we make now will determine whether this transition creates a future that is fair, inclusive, and built on trust.

As Australia moves towards a renewable energy future, we have a unique opportunity to ensure that this transition is more than just a technological shift. It's a chance to rethink how we can create a more inclusive and resilient energy system, and the way we navigate this transition will determine who benefits: a just, equitable, and ultimately successful transition relies on – as far as possible – no-one being left behind.

Understanding public perceptions is key. Australians broadly support the move to clean energy, but they also have real questions and are uncertain about what the energy transition means for them. Will it lower costs? Will it create local jobs? Will it improve or weaken energy reliability?

At the same time, economic uncertainty is shaping public attitudes and amplifying concerns, as households and businesses navigate cost-of-living pressures and question whether the benefits of this transition will be fairly distributed. If we don't put people at the heart of the energy system and ensure all voices are heard, we risk replicating the flaws of the old system and deepening inequalities, rather than fulfilling the transition's promise of a better future for all.

The shift to renewable energy depends on inclusive decision-making, transparency, and shared value. If we get this right, the energy transition can do more than power homes and businesses. It can strengthen communities, drive innovation, and ensure that all Australians benefit.

This report explores consumer attitudes and perceptions of the energy transition, highlighting how we can collectively put people at the heart. It explores how Australians currently view the energy transition – its potential benefits, key concerns, and opportunities to build trust and participation. By listening to their perspectives, we can shape a transition that is not only cleaner and more resilient but also widely supported. More than just an assessment of progress, this report is a call to action: to prioritise people and ensure that Australia's energy future is fair, inclusive and beneficial for all.



Louise Pogmore
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Executive summary

KPMG conducts annual research into understanding public perceptions and attitudes towards the energy transition. This year, a nationally representative survey of 1,012 people was conducted, with an additional 303 people surveyed who live in areas of existing energy infrastructure and those who live within either potential or declared renewable energy zones.

Our research reveals that while there is a significant year-on-year increase in understanding and awareness, support continues to grow, however at a slower rate. This year's findings highlight a crucial nuance: as awareness and understanding increase, they are not translating into support at the same rate.

With public support more critical than ever, it is essential not only to build awareness and understanding but also to strengthen trust, confidence, and ultimately, support. To harness this momentum, we must address confusion around the transition – its impacts, benefits, and costs – while acknowledging the ongoing pressures of the rising cost of living.

Support is growing, but gaps remain

Awareness of the energy transition is increasing year-on-year and continues to be part of public discourse. Public support is also growing, but at a slower pace. In January 2025, when prompted with a definition of the energy transition, 66% of Australians supported the concept. Additionally, more Australians now believe the transition will have a positive impact on their household during the process (42%), and 57% believe it will have a positive impact once energy targets are met.



66%

of Australians support the concept of the energy transition once informed

However, positive sentiment toward the transition is not increasing at the same rate as awareness and understanding. This suggests emerging challenges in translating knowledge into action and support.

Conflicting and confusing information is limiting progress

Public understanding of the energy transition remains low, with only 27% of people reporting at least some understanding of the term – up from 23% in November 2023. Confusion is a major barrier with 43% of people who had no/basic understanding attribute it to limited access to clear information, while 33% cite too much conflicting information.

Many Australians already take individual actions to reduce their environmental footprint, such as limiting energy use at home (89%) and adopting energy-efficient appliances (79%), but only 30% feel confident they understand how their household can contribute to the broader energy transition.

While people want to play a role in the transition, many don't know where to start or how they can contribute meaningfully.



Cost-of-living concerns at the heart of hesitancy

Consumers are deeply concerned about rising energy costs, with 51 % of Australians struggling to pay their energy bills. With cost-of-living pressures intensifying, many fear the transition will add to financial strain rather than alleviate it.

Without clear communication on affordability and reliability, scepticism will persist.

Balancing benefits with preparedness for impacts

Australians believe it is important that the energy transition delivers benefits, such as lowering electricity costs (82%), increasing energy efficiency (75%), and ensuring energy security (73%). However, they are also bracing for the impacts, with Australians concerned about rising prices (80%), energy reliability (70%), and environmental impacts (72%).

A knowledge gap is undermining confidence

Low consumer knowledge about the complexities of the transition, including its costs, infrastructure needs, and potential benefits will continue to erode trust if expectations are not clearly managed.

How to bridge the gap

Despite growing awareness and understanding for the transition, trust remains fragile. Many Australians are uncertain about what the transition entails for them, especially concerning pricing, affordability, and its impact on their everyday lives.

Public confidence in government and industry remains low, particularly in impacted communities. Many Australians believe it is up to government and energy providers to lead the transition, yet they remain sceptical about whether the transition will deliver affordable and reliable outcomes.

Without greater transparency, ethical leadership and overcoming conflicting and confusing information, trust will continue to erode.

Australia's energy transition is more than an infrastructure challenge – it's a human challenge. This year's research highlights key public concerns, including whether targets will be met, how benefits will materialise, potential impacts, and the broader pressures of the rising cost of living.

For Australia to successfully navigate the transition, trust must not only be built but sustained. Trust isn't earned through promises alone.

Building trust through ability, humanity and integrity

To move beyond raising awareness to driving real action, we must deepen public understanding and foster trust by demonstrating capability (Ability), prioritising people (Humanity) and ensuring ethical leadership (Integrity).¹

The absence of any of these three characteristics of trust will erode confidence and scepticism will continue to grow, making the transition even more challenging.

By prioritising trust, transparency and shared value, we can turn awareness into action, scepticism into confidence and uncertainty into a shared vision for Australia's energy future.

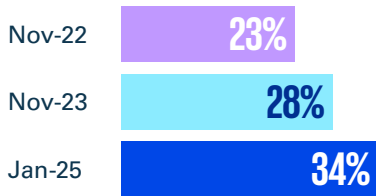
¹ Trustworthy by design: A practical guide to organisational trust, The University of Queensland, November 2019

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Key stats

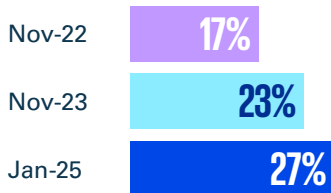
Awareness

of the term 'energy transition'



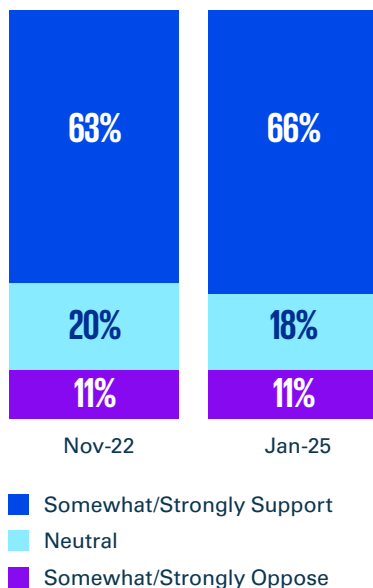
Understanding

of the term 'energy transition'



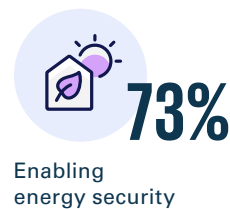
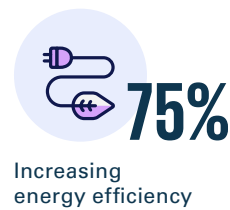
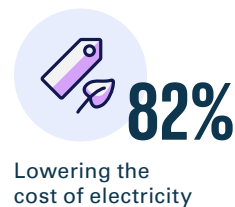
Support

for the 'energy transition'



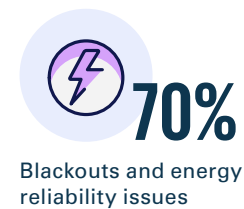
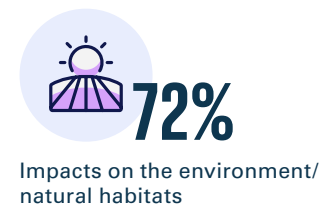
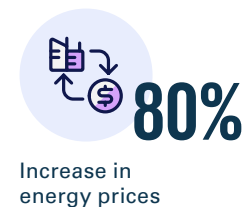
Top 3 benefits

for the transition to deliver
(% Important/Very Important)



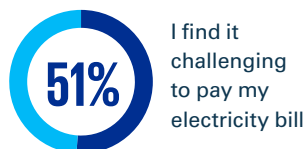
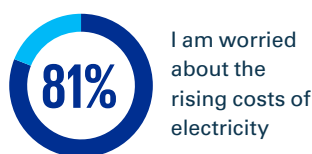
Top 3 issues

of concern (% Moderately/Extremely Concerned)



Concerns

about energy bills
(% Agree/Strongly Agree)



Short-term disruptions

caused by the energy transition
are worth the long-term benefits

Agree/Strongly Agree:



Neither Agree nor Disagree:



Disagree/Strongly Disagree:



Unsure:



Green intentions

45% I pay more for environmentally friendly products



44% Even if they cost more, I choose to purchase brands that have environmentally sustainable practices and/or actively minimise their impact on the environment



35% I use a green energy retailer as my electricity supplier



32% I have changed some, or all, of my personal financial investments to more ethical or sustainability related investment options



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Survey results

Closing the gap on energy transition awareness and understanding

Steady growth in awareness

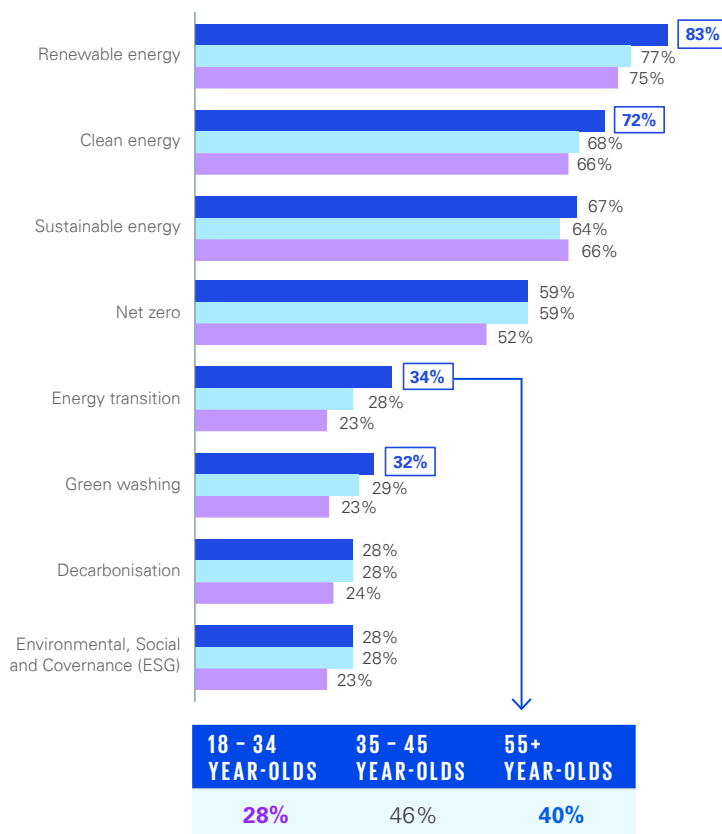
Awareness of the term 'energy transition' is increasing year-on-year. In January 2025 it sits at 34%, which is significantly higher than the November 2023 level of awareness (28%) and the November 2022 level (23%).

Australians are also significantly more likely to be aware of the terms 'renewable energy' (83%) and 'clean energy' (72%) than they have been in previous years.

This shows that the energy transition is becoming an increasingly evident topic of public discourse. Awareness of energy transition has traditionally been strongest amongst the 55+ age group and this has continued with awareness at 40%, compared to 28% in the 18–34 age group. This identifies a gap in younger generations' awareness and familiarity with the term.

Interestingly, those who live in areas with existing energy infrastructure are significantly less likely to have heard of the term 'energy transition' (23%). However, those who live in declared and potential renewable energy zones are just as likely as the rest of Australia to have heard of the term 'renewable energy' (35%).

Here are some terms that may relate to the energy sector. Which of these have you heard of before today?



Moving beyond a basic understanding

Understanding of the term ‘energy transition’ has also significantly improved in January 2025, reaching 27% who say they have at least some understanding of the term (up from 23% in November 2023).

However, understanding of the energy transition still remains critically low, with only 2% having an ‘excellent’ understanding, a further 8% having a ‘good’ understanding, and 19% saying their understanding is ‘basic’.

Understanding of the energy transition also differs by age, with the 55+ age group the most aware of energy transition and having the greatest level of understanding amongst those who are aware.

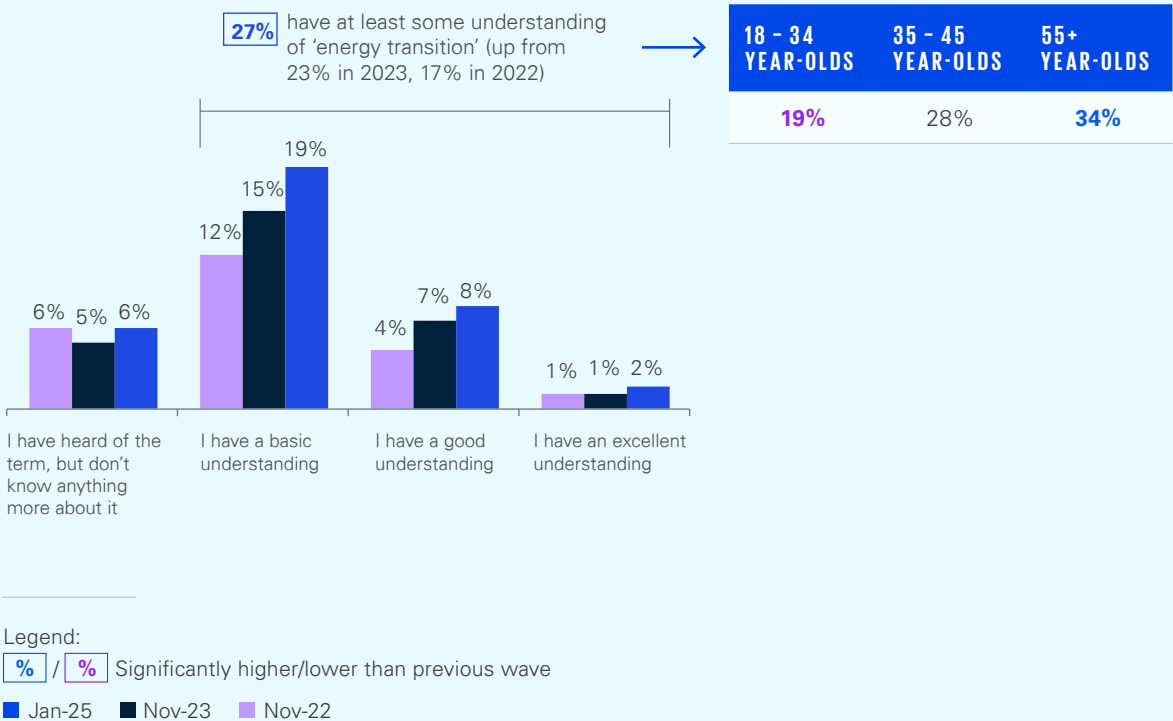
The 18–34 age group trails in understanding, with only one in five (19%) saying they have at least some understanding of the energy transition.

While awareness of the energy transition is increasing among Australians, significant gaps remain, with most of those who are aware of the transition self-describing as having only a ‘basic’ understanding. This indicates a need for enhanced educational efforts and communication strategies to ensure the public fully comprehends the importance and implications of the transition towards renewable energy.

Without understanding of the energy transition – including what it is and why it is needed – it will be very hard to build informed support.

Addressing these gaps is crucial for broader public support and effective implementation of energy policies, especially given the disparities in awareness across different age groups and regions.

Which of the following best describes your understanding of the term ‘energy transition’?

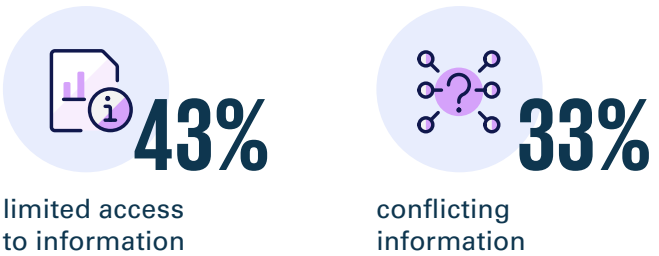


Barriers to public understanding



Grappling with unclear and contradictory information

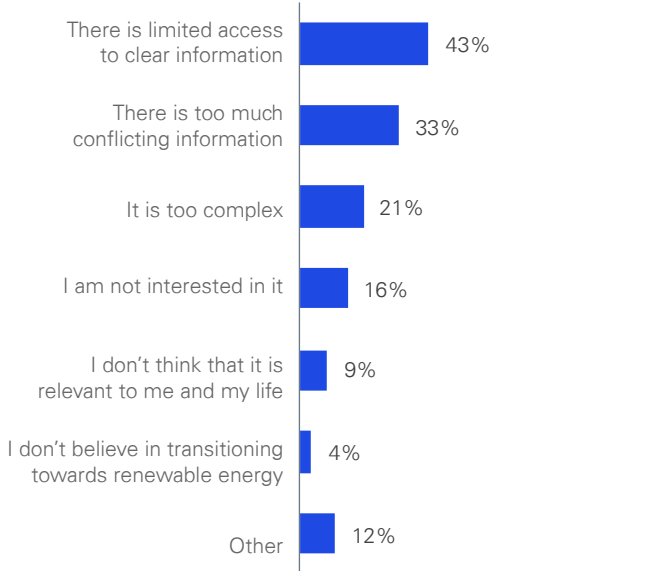
Of those who have only a basic or even no understanding of what the term ‘energy transition’ means, the majority say there is limited access to clear information (43%) or there is conflicting information (33%).



When there is a lack of basic understanding of what the energy transition entails, due to unclear or contradictory information, it becomes very difficult for people to support and participate. It can also undermine trust, as people may feel overwhelmed or mistrustful of the information currently available to them.

To overcome these barriers, it is essential to provide consistent, clear, and accessible information about the energy transition – helping the public understand the broader context, its importance, what is required from them, and how they can participate. This will enable more informed, unified, and effective involvement towards achieving Australia's sustainability goals.

Why do you think you have a basic/no understanding of the energy transition?



Support is edging forward

From awareness and understanding to support – bridging the gap

Once prompted with a definition, two-thirds of Australians are supportive of the transition, with 66% supporting the concept. Similar to the increase in awareness and understanding about the transition, support is also increasing, however at a slower rate. As Australia continues to transition towards renewable energy, it is challenged with building support through the communication of benefits while also increasing understanding and awareness.

Support also differs across age groups, with support the strongest amongst the youngest age group. Almost three-quarters (72%) are supportive of the transition, compared to 59% of the 55+ age group.



72%

of those surveyed
are supportive
of the transition



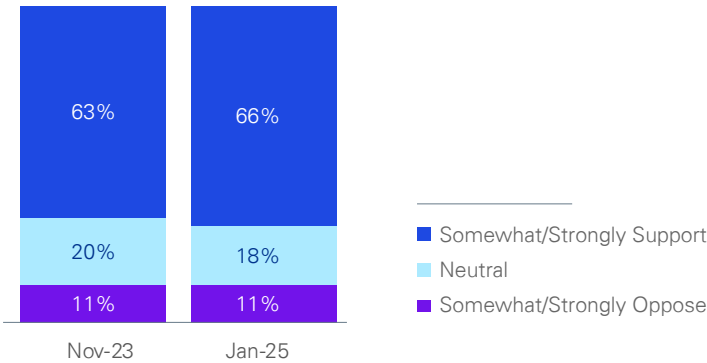
59%

aged 55+
are supportive
of the transition

Those who live in existing energy infrastructure areas are significantly less likely than other Australians to be supportive of the transition, with one in two (53%) saying that they support the transition. These existing energy zones are often those that have relied on traditional forms of energy and have embedded industries reliant on fossil fuels and gas, and lower support in these areas may reflect concerns for the loss of these established industries.

Whilst awareness and understanding are growing, uncertainty remains. It's critical to continue to bridge the gap between awareness and understanding, but information alone won't build trust – demonstrating fairness, realising shared benefits and fostering transparency will help turn the knowledge into confidence and support.

The text below describes the overall concept of ‘energy transition’. How do you feel about ‘energy transition’?



Energy transition is the ongoing process of replacing fossil fuels with zero carbon, or low carbon emitting energy sources. This includes replacing oil, natural gas and coal generation with renewable energy sources like wind and solar, as well as lithium-ion batteries. At its heart is the need to reduce energy-related carbon dioxide emissions to limit climate change.

B4. HOW DO YOU FEEL ABOUT ENERGY TRANSITION?	18 - 34 YEAR-OLDS	35 - 45 YEAR-OLDS	55+ YEAR-OLDS
SOMEWHAT/STRONGLY SUPPORT	72%	65%	59%
NEUTRAL	16%	20%	17%
SOMEWHAT/STRONGLY OPPOSE	7%	10%	18%

Legend: % / % Significantly higher/lower than total



Australians go green but cost of living comes first

Young people more likely to pay for eco-friendly options

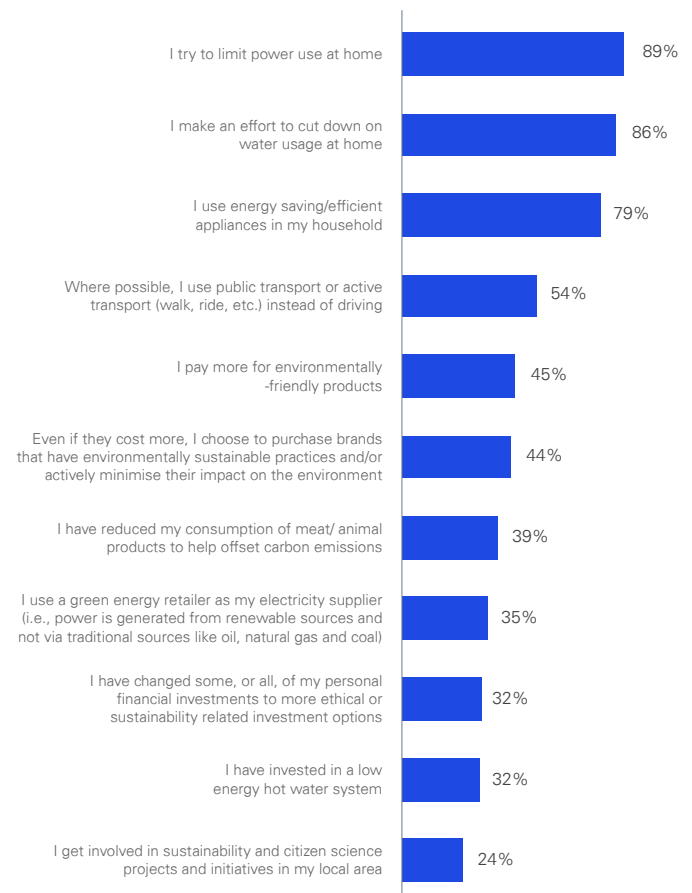
Most Australians consider and participate in behaviours to reduce their environmental impact. The most common ways Australians do this is through limiting power usage at home (89%), making an effort to cut down on water usage (86%) and using energy saving/efficient appliances (79%).

This demonstrates a willingness by Australians to engage in sustainable actions on a personal level. However, fewer Australians say they are likely to change their behaviours if costs are involved, for example: paying more for environmentally friendly products (45%), choosing brands that have environmentally sustainable practices (44%), using a green energy provider (35%) or changing some/all of my investments to more ethical or sustainability related investment options (32%).

The younger generation are more likely to pay more for eco-friendly options. The research showed that significantly more 18 to 34-year-olds say they would pay more for environmentally friendly products (59%), pay more for environmentally friendly brands (53%), use a green retailer (46%) or invest in more ethical or sustainable investment options (47%) than other cohorts.

While Australians think about ways to reduce their environmental impact on a personal scale, the cost of living is having tangible implications on their ability to pay more to facilitate this.

Listed below are some things that you may or may not do. Please select whether or not the statements apply to you.



A1 LISTED BELOW ARE SOME THINGS THAT YOU MAY OR MAY NOT DO. PLEASE SELECT WHETHER OR NOT THE STATEMENTS APPLY TO YOU.	18 - 34 YEAR-OLDS	35 - 45 YEAR-OLDS	55+ YEAR-OLDS
I PAY MORE FOR ENVIRONMENTALLY-FRIENDLY PRODUCTS	59%	46%	28%
EVEN IF THEY COST MORE, I CHOOSE TO PURCHASE BRANDS THAT HAVE ENVIRONMENTALLY SUSTAINABLE PRACTICES AND/OR ACTIVELY MINIMISE THEIR IMPACT ON THE ENVIRONMENT	53%	45%	30%
I USE A GREEN ENERGY RETAILER AS MY ELECTRICITY SUPPLIER (I.E., POWER IS GENERATED FROM RENEWABLE SOURCES AND NOT VIA TRADITIONAL SOURCES LIKE OIL, NATURAL GAS AND COAL)	46%	32%	26%
I HAVE CHANGED SOME, OR ALL, OF MY PERSONAL FINANCIAL INVESTMENTS TO MORE ETHICAL OR SUSTAINABILITY RELATED INVESTMENT OPTIONS	47%	31%	15%

Legend: % / % Significantly higher/lower than total

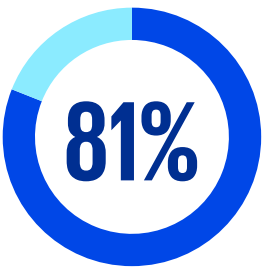
Cost of energy remains a top concern

In the midst of a cost-of-living crisis, cost outweighs environmental considerations, with 81% of Australians confirming they agree/strongly agree that they are worried about the rising costs of electricity. This concern is consistent across age groups. Worryingly, one in two (51%) agree that they find it challenging to pay their electricity bill.

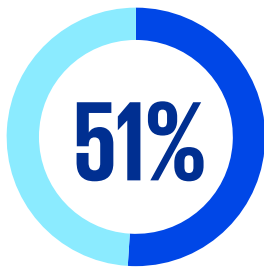
With cost-of-living pressures intensifying, many fear the transition will add to financial strain rather than ease it. Without assurances that affordability and energy security will improve, scepticism will persist. Bridging the gap between knowledge and support requires trust, direct cost savings and visible outcomes.

Now thinking about your energy needs, to what extent do you agree or disagree with the following statements.

% Agree/Strongly Agree



I am worried about the rising costs of electricity



I find it challenging to pay my electricity bill

2030 emissions targets: Can we get there?

Low confidence in achieving current targets

Fewer than 10% believe that Australia will reduce carbon dioxide emissions by 43% by 2030. Australians are more likely to believe the target will be reached by 2040. However, there is still one in five (20%) who believe current efforts aren't enough, or the target is unachievable.

When asked about reaching carbon neutrality, more than a quarter (27%) believe current efforts/plans aren't enough, or that it is unachievable.

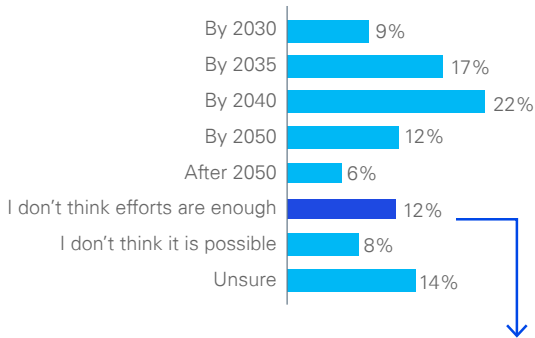
Overall, there is low confidence by the public that Australia is going to reach its targets.

Those who live in energy infrastructure zones are even less confident that enough is being done for Australia to reduce carbon emissions by 43% and they are more likely to think it is not possible to reach carbon neutrality.

The heightened concern among those living in energy infrastructure zones suggests a need to address specific concerns, including demonstrating progress, benefits, transparency, and commitment in order to foster a collective effort and impact towards a sustainable future.

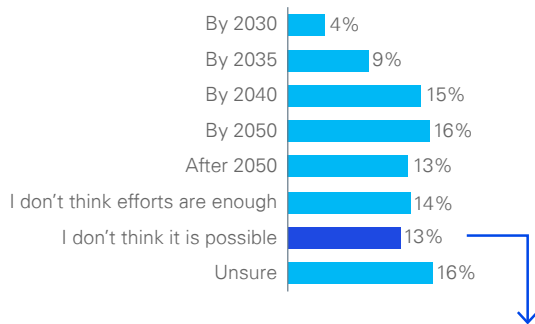
With rising community concerns, it is critical to uplift understanding, including current challenges and the path forward for what the 'energy transition' means for everyone.

How long do you think it will take for Australia to reduce carbon dioxide emissions by 43%, which is the Federal Government's current 2030 target?



EXISTING INFRASTRUCTURE ZONES	DECLARED & POTENTIAL RENEWABLE ZONES
20%	19%

How long do you think it will take for Australia to achieve Carbon Neutrality (or Net Zero)? Carbon Neutrality is an overall balance between greenhouse gas emissions produced and greenhouse gas emissions taken out of the atmosphere.



EXISTING INFRASTRUCTURE ZONES	DECLARED & POTENTIAL RENEWABLE ZONES
20%	20%

Energy transition – how do I help?

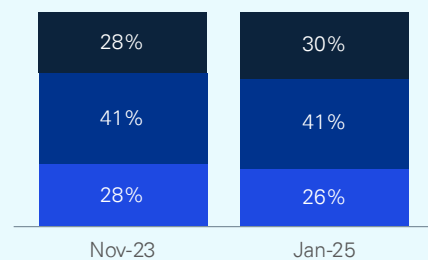
Lack of confidence jeopardises adoption

Only 30% of Australians are confident in their understanding of what their household can do to help with Australia's energy transition.

People want to play a role but don't know where to start. Low confidence around the actions people can take indicates a gap that can impede the widespread adoption of energy-efficient practices and technologies, which are crucial for reducing carbon emissions and transitioning to sustainable energy sources.

By enhancing public confidence and knowledge, households can play a more active role in driving the change towards a greener future.

How confident are you in understanding the things your household can do to help Australia's energy transition?



- Very/extremely confident
- Somewhat confident
- Not at all confident/slightly confident



ONLY
30%

of Australians are confident in their understanding of what their household can do to help with Australia's energy transition.

Hoping for benefits but bracing for impacts



Optimism grows as benefits take shape

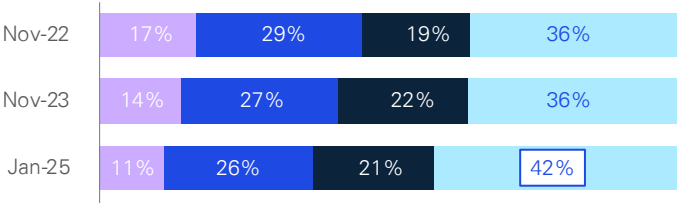
In January 2025, significantly more Australians believe the energy transition will have a positive impact on their household during the transition (42%) and more than half (57%) believe there will be a positive impact on their household after energy targets are achieved. Significantly more of the younger age group (18–34) believe there will be a positive impact during (52%) and after (66%) the transition targets have been achieved.

This further demonstrates positive sentiment towards the transition, and that support for the transition is growing as people are seeing the potential for the benefits of the transition.

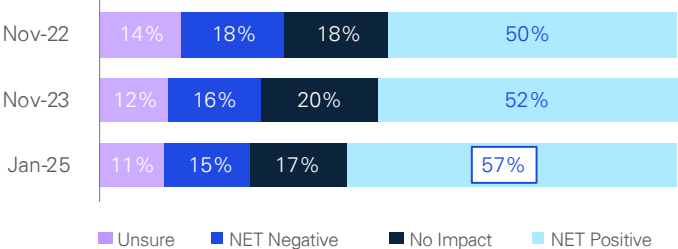
Those who live in existing areas of energy infrastructure are significantly less likely to believe there will be a positive impact on their household during the process of replacing fossil fuels with low/zero carbon energy sources (33%). This may be due to concerns around replacing existing industry with newer industries as Australia decarbonises, and experiences with the development of energy projects.

Overall, how much impact do you feel that the energy transition will have on you and your household...

During the process of replacing fossil fuels with low/zero carbon emitting energy sources



After energy transition targets have been achieved



Legend:

% / % Significantly higher/lower than previous wave

Bracing for challenges

Overall, Australians are having an increasingly positive outlook on the energy transition, with the majority believing it will benefit the country, their communities, and themselves personally once provided with a definition.

69% believe the energy transition will have a significant/moderate benefit for the whole of Australia, with two-thirds believing that the energy transition will benefit their local community (62%), and one in two (55%) expecting to see a personal benefit.

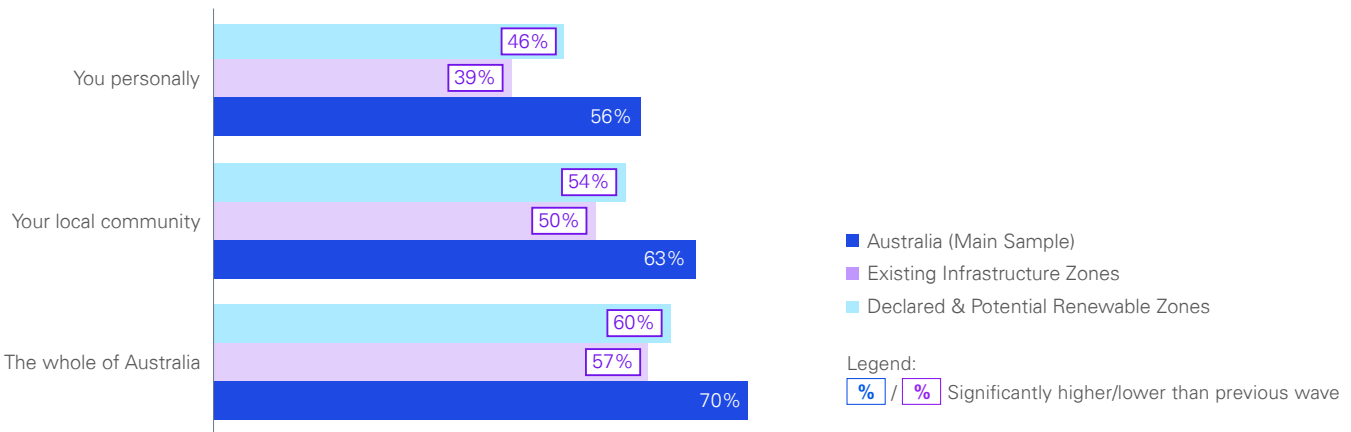
However, there are notable concerns about potential negative impacts, especially within local communities and the broader nation.

Only a small portion (15%) say there will be no negative impact on them personally. One in two Australians (54%) believe that there will be a moderate/significant impact on the local community and 61% believe there will be a moderate/significant impact on wider Australia.

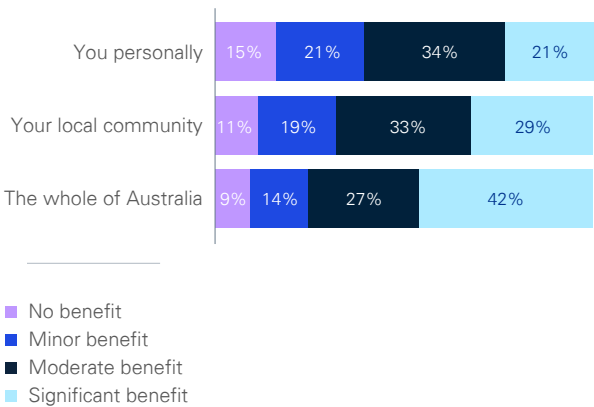
While younger Australians are more likely to see benefits – with the 18–34 age group significantly more likely to say the energy transition will benefit themselves (69%), their local community (75%) and wider Australia (83%) – those who live in energy infrastructure zones (both existing and declared potential renewable zones) are more hesitant, and think they are less likely to see any benefits.

This underscores the need for clear communication and addressing concerns to ensure broader support and a smoother transition, as people believe that while there will be long-term benefits of the transition they are also bracing for negative impacts.

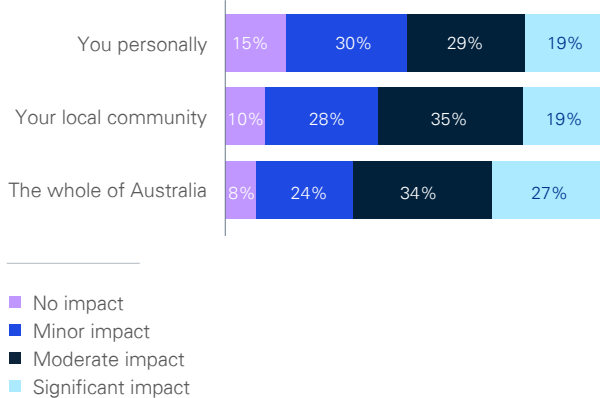
% Moderate/Significant Benefit



How much of a benefit do you think the energy transition will have on you personally, your local community and the whole of Australia generally?



How much of a negative impact do you think the energy transition will have on you personally, your local community and the whole of Australia generally?



Transition trade-off: weighing the benefits



Short-term disruptions are worth the long-term benefits

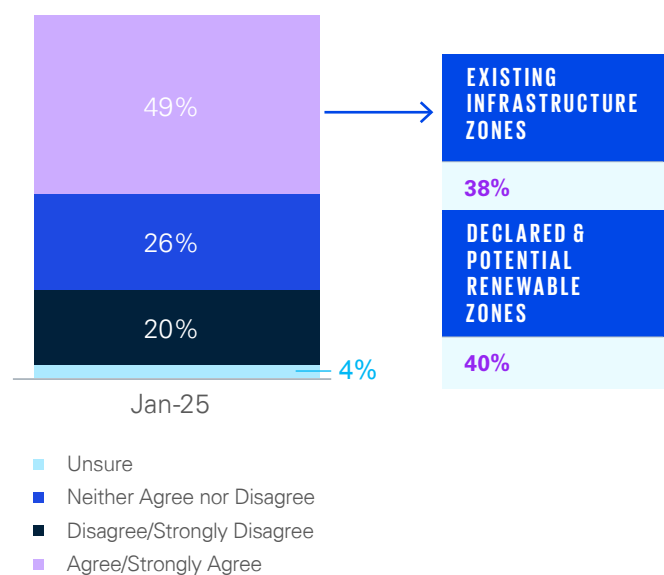
One in two Australians (49%) agree that the short-term disruptions of the energy transition are worth the long-term benefits. A further 26% neither agree nor disagree – further engagement on benefits with this group could improve long-term support.

With more awareness of and concern about the potential issues of the energy transition, those who live in energy infrastructure zones are less likely to agree that short-term disruptions caused by the energy transition are worth the long-term benefits (existing energy infrastructure areas 38% agree; declared and potential renewable energy zones 40% agree).

As we transition towards renewable energy, those areas that are most impacted are feeling underprepared to support the level of infrastructure required.

While some believe the transition is necessary, many remain on the fence, unsure if the benefits outweigh the impacts. Proactive policies, tangible benefits and inclusive engagement will be needed to shift the neutrals to active supporters.

Please rate the extent to which you agree with the following statement: Potential short-term disruptions caused by the energy transition are worth the long-term benefits.



Transition tension: better bills, no blackouts

Lowering the cost of energy is top of the list

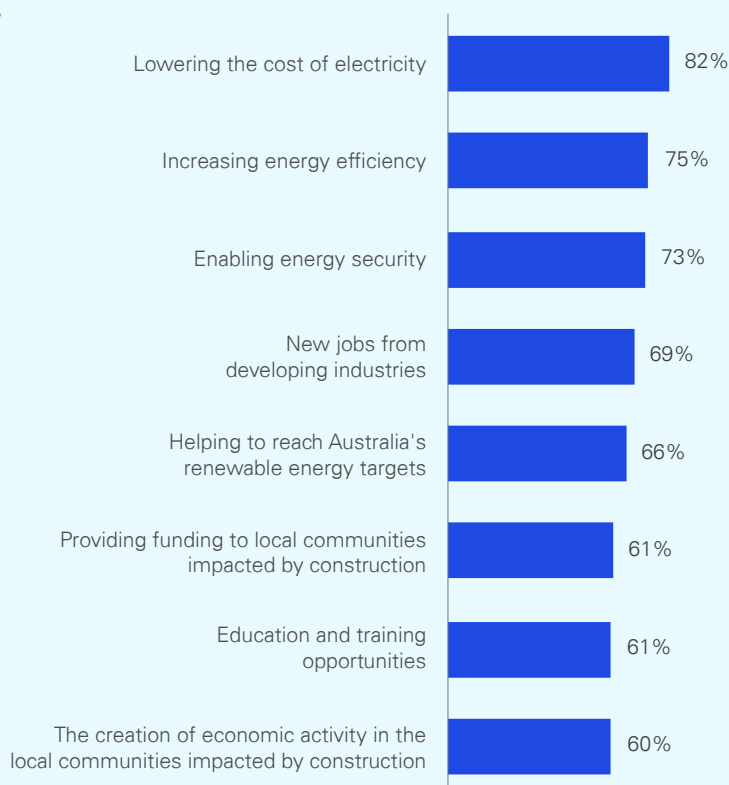
Australians believe it is most important for the energy transition to deliver on *Lowering the cost of energy* (82% Important/Very Important), *Increasing energy efficiency* (75% Important/Very Important), and *Enabling energy security* (73% Important/Very Important). This shows that the rising cost of living, and concerns around being able to pay energy bills remains front of mind for Australians.



of Australians believe it is most important for the energy transition to deliver on lowering the cost of energy

Below are some potential benefits of the energy transition to Australia. Please rate how important it is to you that the transition delivers:

(% Important/Very Important)



Concerns about the environment and energy reliability

Increased energy prices cause the most concern amongst Australians, with 80% saying they are extremely/moderately concerned. Following that, almost three-quarters (72%) are moderately/extremely concerned about impacts on the environment/natural habitats.

Those who live in energy infrastructure zones, both existing energy zones and declared potential renewable zones have a higher level of concern for regional communities being under-supported to host infrastructure and issues with infrastructure development (such as transmission lines).

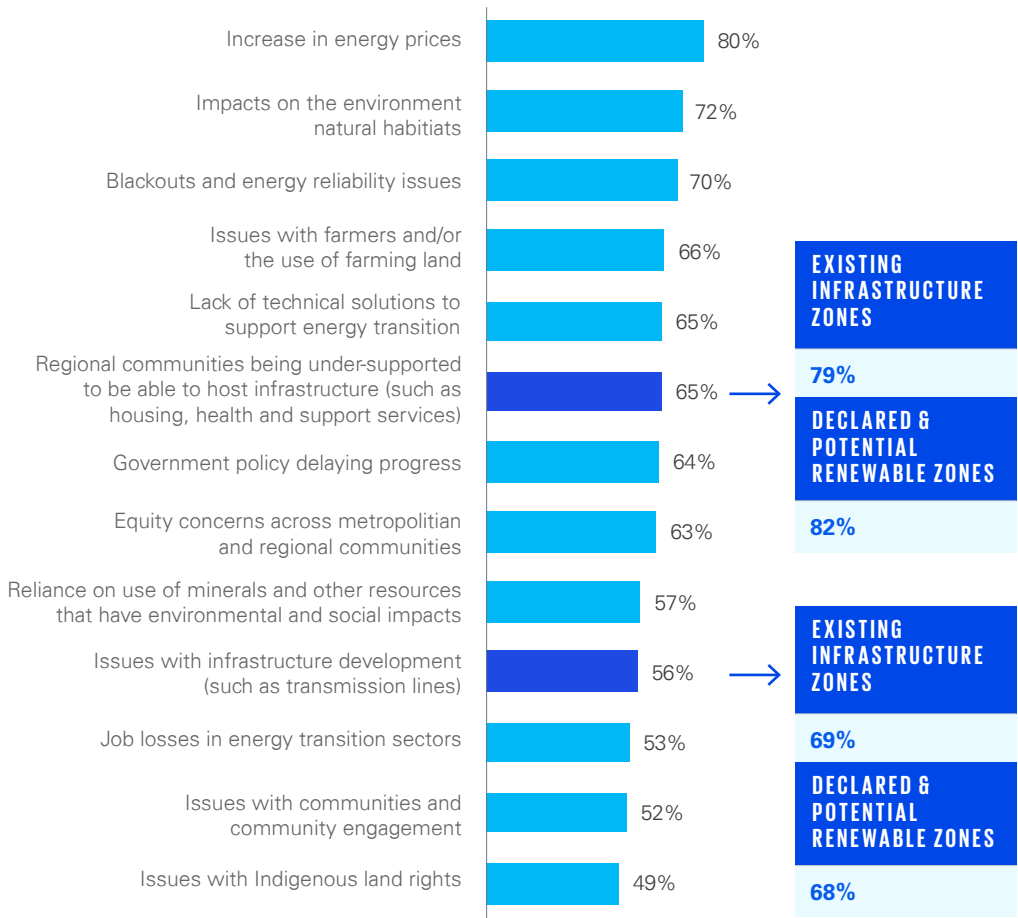
Interestingly, lowering the cost of energy is the primary benefit identified by Australians that the transition will deliver (82%), but increasing energy prices is also the primary issue people are aware of in relation to the transition (80%). This demonstrates the confusion and conflicting messaging to Australians around the transition.

Australians see the potential positives of the transition (lower costs and energy security) but also fear rising prices and blackouts.

Both households and impacted communities will be able to realise the benefits of the transition but believe they may still be vulnerable to negative consequences.

It is important that as we transition, trust is built between industry, government and communities to be able to effectively manage and mitigate impacts. This includes clear and consistent information around the transition, its benefits and impacts so that communities are better able to engage in discussions about the transition and have their concerns heard.

How concerned are you about these issues?
% Moderately/Extremely Concerned



Government and industry to light the way

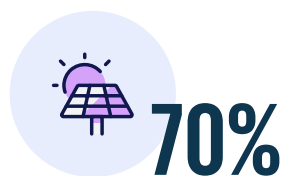
Keeping energy affordable, reliable and transparent

Australians continue to believe energy change is the responsibility of government organisations and the energy industry.

There is also an expectation that energy retailers should bear the cost of sustainable solutions (70% Agree/Strongly Agree).

Australians themselves are not willing to pay more to support the transition, with only a third of Australians (35%) saying they would pay more to go with an energy provider that is transitioning to better renewable sources – although this increases to 45% amongst the 18–34 cohort.

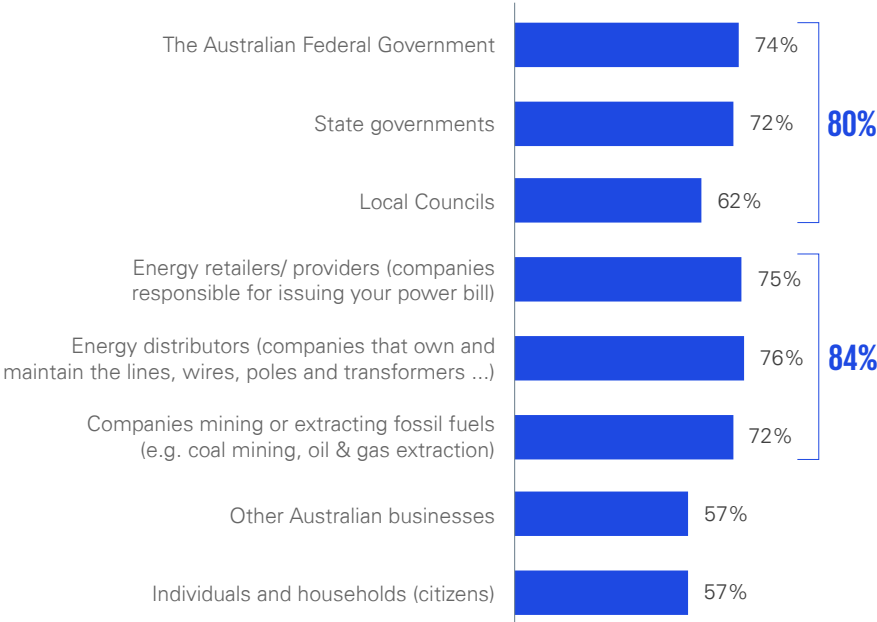
Australians look to government and industry to guide the transition, especially as cost-of-living pressures intensify. To maintain public confidence, leaders must focus on practical solutions that keep energy affordable, ensure reliability and provide clear and transparent communication about how the transition benefits all Australians.



of Australians expect their energy retailer to invest in solutions to protect the environment without passing on the costs to their customers

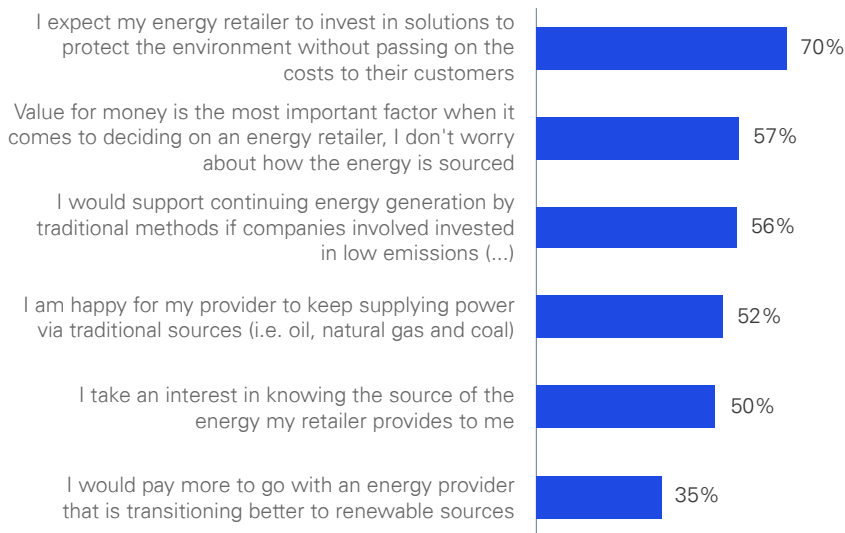
In your opinion, how important is it for the following groups within Australia to actively make changes to support the ‘energy transition’?

% Very Important/Absolutely Essential



Now thinking about your energy needs, to what extent do you agree or disagree with the following statements.

% Agree/Strongly Agree



04

Conclusion

Conclusion

This year's research shows that support, awareness and understanding for the energy transition are increasing. However, overall understanding remains low – highlighting a gap in public knowledge about the transition and why it is necessary. Additionally, while awareness and understanding continue to grow year-on-year, they are not translating into support at the same rate – indicating early signs of a potentially critical gap. With the Australian public's acceptance of the transition more critical than ever, it is important to not only build awareness, it is critical to also build understanding of the transition, strengthen trust, confidence and ultimately, support.

How can we build a people-centred transition built on trust, confidence and active participation?

Australia's energy transition is more than an infrastructure challenge – it's a human challenge. While awareness is rising, trust remains fragile, and many Australians are unsure what the transition means for them, particularly in terms of pricing, affordability and impact of the transition on their daily lives.

At the core of trust is the willingness to be vulnerable to the actions of another party based on positive expectations of their intentions or actions. This year's research highlights key concerns including whether targets will be met, benefits will be realised, potential impacts and broader pressures of the rising cost of living.

For Australia to successfully navigate the transition, trust must not only be built but sustained. Trust isn't earned through promises alone – turning support into action requires more than just raising awareness.

We must deepen public understanding and foster trust by demonstrating capability (Ability), prioritising people (Humanity) and ensuring ethical leadership (Integrity).²

Ability

I can rely on you to be competent

Humanity

I believe you care about your stakeholders

Integrity

I trust you will do the right thing for the right cause

The absence of any of these three characteristics of trust, confidence will erode and scepticism will grow, making the transition even more challenging.

Demonstrate Ability: making the transition tangible and delivering on promises

Why demonstrating Ability is critical for a human-centred transition

Without a clear and consistent narrative about why the energy transition is needed and how Australia will transition, there is a risk that the gap between awareness, understanding and support will continue to widen. A lack of clarity and consistency undermines public confidence and impacts overall support.

Many Australians doubt that we will achieve our energy transition goals. This scepticism is higher in impacted communities and those within existing energy infrastructure areas, which are needed to support the transition and where key skills and reskilling of the workforce is critical.

What can we do to demonstrate Ability?

- **Articulate the why and the complexities of the how.** To continue to grow understanding of the transition and enable support to be built at the same pace, collectively we must clearly communicate both its purpose and the complex challenges it presents. A transparent discussion of the energy trilemma is essential – balancing security, affordability and reliability – to help navigate the complexities of the transition with clarity and confidence.
- **Clarify roles, responsibilities, and costs.** Clearly define the roles of government, industry, communities and individuals. Providing transparency on how the cost of the transition will be shared among industry, government, and consumers, and ensuring there is clear guidance and support for reskilling programs to equip the workforce for the transition.
- **Build confidence in delivery.** Increasing transparency around targets, reporting and Australia's progress in the transition. Providing regular, accessible updates on milestones to demonstrate tangible progress.

² Trustworthy by design: A practical guide to organisational trust, The University of Queensland, November 2019

Emphasise Humanity: a transition that puts people first

Why Humanity is critical for a human-centred transition

As Australians are facing increasing cost-of-living pressures, it is essential to consider how these challenges influence public support. If the financial impacts of the transition are not addressed clearly and proactively, scepticism about its benefits will likely grow. Additionally, low public awareness of the transition's complexities – including cost implications, infrastructure needs, and also any potential benefits – may further erode trust if community expectations are not met.

What can we do to demonstrate Humanity?

- **Continue to support Australians facing cost-of-living pressures.** There is a need to ensure that all Australians, especially the most vulnerable, receive support throughout the energy transition. Ensuring targeted assistance to mitigate financial strain and ensure energy affordability remains a priority.
- **Shape solutions and benefits with people.** It is critical to understand what benefits people want delivered by the transition – taking a place-based approach to further understand the needs of specific communities, so gaps can be identified and solutions tailored to their specific needs.
- **Provide support to those communities who are facing cumulative impacts.** Some communities will be disproportionately affected by the transition, whether through increased infrastructure demands, changing industries or job losses. It is critical to support these

communities through skills and capacity building, as well as investments in local infrastructure and services to support long-term resilience and ensure they are not left behind.

- **Provide clarity around the complexities of the energy transition.** Clearly communicate the cost impacts, infrastructure needs and potential benefits in the short, medium and long term. Ensuring information is clear, accessible and transparent, addressing concerns and setting realistic expectations will help to ensure fair and equitable outcomes built on shared value.

Uphold Integrity: do what you say you will do

Why Integrity is critical for a human-centred transition

Trust erodes when commitments are not met – or even when there is a perception that they have not, or will not, be delivered. Given the scale and complexity of the energy transition, changes and new challenges will inevitably arise. This makes transparency even more critical. To maintain trust, commitments must be followed through, and any changes must be clearly communicated as they arise. Misinformation about the transition – its impacts, costs, and benefits – must be actively corrected to prevent scepticism from growing.

What can we do to demonstrate Integrity?

- **Follow through on commitments, particularly benefits.** Clearly define what is negotiable and non-negotiable prior to engaging with communities and ensure that promises made – especially those regarding community benefits – are realistic and achievable

- **Communicate openly when things change.** Be transparent about shifts in plans, challenges, or delays. Close the feedback loop – explain why changes are happening and what steps are being taken to address them.
- **Ensure all voices are heard.** Recognise that different communities will experience the transition in different ways – some more significantly than others. Engage a diverse range of voices, ensuring that all perspectives are considered and impacts fully understood.
- **Commitment to long-term community engagement.** Ensure that the energy transition delivers tangible, long-term benefits aligned with regional needs and expectations. Prioritise inclusion of Traditional Owners and First Nations communities, respecting their perspectives and ensuring their voices contribute to shaping the transition.

By prioritising Ability, Humanity and Integrity, we can build trust, foster transparency and create shared value – turning awareness into action, scepticism into confidence and uncertainty into a shared vision for Australia's energy future.

KPMG is committed to supporting government, industry and communities in navigating this transition – providing the insights, strategies and collaboration needed to turn support into action.

A full-page background image showing two construction workers in yellow shirts and red overalls, wearing hard hats, carrying a large solar panel across a roof covered in corrugated metal sheets. The scene is set against a bright, hazy sky, suggesting a sunrise or sunset. The workers are positioned in the center-right of the frame, moving towards the left. The solar panel is held horizontally between them. The roof's corrugated metal is in the foreground, creating a sense of depth.

05

Research methodology

Methodology

A robust, 10-minute, nationally representative online survey has been conducted across three years to measure awareness and perceptions of the energy transition among everyday Australians.

The inaugural survey was conducted in November 2022, and repeated in November 2023 and January 2025, to track changes to community awareness and understanding of energy transition in Australia.

The survey covers:

- household energy use and perceptions of the environment
- awareness of, and support for the energy transition
- perceptions of how energy transition can/should happen

- confidence that the energy transition targets will be achieved
- benefits and potential impacts of the energy transition.

Each year, the survey has been conducted with a nationally representative sample of Australians aged 18+ years old. Research recruitment was conducted via an accredited market research panel provider to survey adults in line with proportions that represent the Australian population by age, gender, state and urbanisation, aligned with

the Australian Bureau of Statistics 2021 Population Census (survey sample demographics provided below).

The 2025 research also included an additional sample of residents who live in areas with existing energy infrastructure, and those who live in potential or declared renewable energy zones.

MAIN SAMPLE DETAILS:		NOV 2022 N=597	NOV 2023 N=1,009	JAN 2025 N=1,012
AGE	18-34	29%	30%	32%
	35-54	38%	41%	40%
	55+	33%	29%	28%
GENDER	Male	50%	52%	49%
	Female	50%	48%	51%
STATE	Australian Capital Territory	2%	1%	2%
	New South Wales	30%	33%	33%
	Victoria	26%	26%	26%
	Queensland	18%	20%	20%
	Western Australia	11%	10%	10%
	South Australia	9%	7%	7%
	Tasmania	3%	2%	2%
	Northern Territory	<1%	1%	1%
REGION	Regional	72%	68%	67%
	Metro	28%	32%	33%
ENERGY INFRASTRUCTURE ZONES		NOV 2022	NOV 2023	JAN 2025
EXISTING ENERGY INFRASTRUCTURE AREAS		n/a	n/a	n=152
POTENTIAL OR DECLARED RENEWABLE ENERGY ZONES		n/a	n/a	n=151

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