SMART ENERGY CONSUMER COLLABORATIVE









2025 ANNUAL REPORT

Amplifying the Voice of the Consumer

Dear members,

As I reflect on the past year, I am proud of the meaningful progress we made together to deepen our understanding of today's consumers and equip members with the insights needed to better serve them. The accomplishments highlighted in this report demonstrate the strength of our community and the shared commitment that drives our mission forward.

With the Research Committee, we produced the latest edition of our long-running segmentation study, *Consumer Pulse and Market Segmentation – Wave 9*, which also yielded the three papers in the Customer Insights Spotlight Series on low-income households, Gen Z and rural consumers.

We also continued the Smart Energy Snapshot Series with three short-form surveys – *Addressing Energy Affordability*, *Warming Up to Winter Demand Response* and *Shining a Light on Solar + Storage* – which helped us gain a greater understanding of consumer needs and wants in these important areas.

Our Education & Outreach Committee also had a productive year, releasing new consumer education materials on electric vehicles and heat pumps and concluding 2025 with the *Your Role in Energy Management* printable brochure, our first-ever resource in both English and Spanish.

We were also fortunate to gather in person three times — at the 2025 Consumer Symposium at DTECH, at the inaugural Summer Summit in Minneapolis and, finally, at Puget Sound Energy for the 2025 Members Meeting & Fall Workshop. These events continue to be essential spaces for collaboration, learning and connection across our membership.

As you review the *2025 Annual Report*, I hope you will see how our collective efforts advanced SECC's mission through impactful research, engaging events and educational resources. Thank you for your continued support – I look forward to building on this momentum together in 2026.



Sincerely,

Nathan Shannon
President & CEO
Smart Energy Consumer Collaborative

Our Mission

The Smart Energy Consumer Collaborative (SECC) is a 501(c)(3) nonprofit organization with a mission to serve as a trusted source of information on consumers' views of grid modernization, energy delivery and usage, and to help consumers understand the benefits of smart energy.

Our Vision

SECC's vision is to empower all consumers to benefit from smart energy.

Our threefold agenda is to...

- Listen to consumers via primary consumer research
- Educate consumers via outreach and messaging toolkits
- Collaborate with stakeholders via hosted events and shared best practices

Collaborative Efforts

Research Committee: Members who are interested in shaping SECC's consumer research participate in the Research Committee to set the research agenda, review detailed findings and discuss the presentation of those findings to members and the industry at large.

Education & Outreach Committee: Members collaborate to improve consumer awareness and understanding of smart energy technologies and related programs and services. The committee produces a wide range of consumer-facing resources, including videos, infographics, fact sheets and more.

Membership Committee: Well-connected industry representatives set benchmark goals for membership, establish a list of prospects and make introductions to support the continuous, balanced growth of SECC's member base.

SECC's Board of Directors

The governing board is made up of members who represent commercial, utility and consumer advocacy organizations along with SECC's legal counsel and president. Started in 2010, SECC's Board of Directors has staggered terms, with approximately half the directors elected each year to a two-year term.

Gomathi Sadhasivan - Chair of the Board
Vice President – Energy Systems, DNV Energy North America

Brad Langley - Treasurer
Chief Marketing Officer, GridX

Mike H. Shanlever - Secretary
Partner, Alston & Bird

Jeff Adams
Senior Vice President, ICF International

Jonathan Coons
Director, Customer Communications & Marketing, National Grid

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Laurence Daniels, Esq.
Assistant People's Counsel, Office of the People's Counsel

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Director of Demand Flexibility, Opinion Dynamics

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Director of Product Management, Opower, Oracle Energy & Water

Kelsey Lawhead
VP, Customer Programs & Strategy, ElectriCities

Seth Little
Director, Market Development, CLEAResult

Norma McCarthy
Customer Engagement Specialist, NB Power

Heather Mulligan
Manager, Customer Clean Energy Solutions, Puget Sound Energy

Vincent Potter
Project Manager, Policy & Markets, NC Clean Energy Technology Center

John Smith
Dir. of Product Mgmt. and Partnerships, Energy Transition Solutions, Vistra

Greg Stevenson
Prin. Customer Experience Strategist for Electric Distribution, Consumers Energy

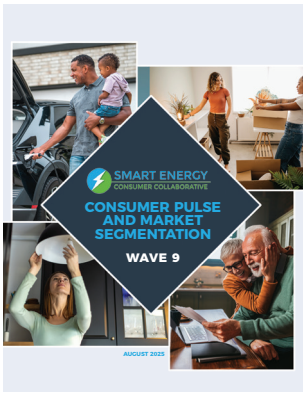
Paul Wezner
Chief Product & Customer Officer, Powerley

Research Highlights



2025 State of the Consumer Report – *March 2025*

This annual report is a meta-analysis of our 2024 research studies and Smart Energy Snapshot Surveys that provides a big-picture look at the energy-related needs and wants of today's residential and small-and-medium business (SMB) customers. The report begins with an overview of the key findings and takeaways from our 2024 studies on energy messaging and SMB customers and four Smart Energy Snapshot Surveys. The second half of the report shares three key themes on today's consumers.



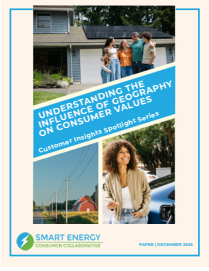
Consumer Pulse and Market Segmentation – Wave 9 – *August 2025*

The *Consumer Pulse and Market Segmentation – Wave 9* report updated our consumer segmentation based on consumers' attitudes around technology, their interests and concerns around electricity, and what they believe electricity providers should prioritize – both for customers and the grid. The research resulted in four new segments: Turnkey Comfort (13% of the general population), Tech-Cautious Savers (25%), Curious and Capable (28%) and Informed and Engaged (34%).

Customer Insights Spotlight Series







Using the survey data from the Consumer Pulse and Market Segmentation – Wave 9 report, we published three demographic deep dives in the fall of 2025:

Building Awareness and Trust with Gen Z Paper

This research sought to understand Gen Z's personal priorities when it comes to electricity and what they want their electricity providers to prioritize. The paper revealed that Gen Z is more tech-friendly than older generations; however, they often aren't sure which steps to take around energy.

Meeting the Needs of Low-Income Households Paper

The second publication in the series explored the electricity attitudes, priorities and concerns of low-income consumers and the barriers that prevent them from engaging in energy programs and services. According to the paper, nearly half of low-income consumers are struggling to pay their electric bills.

Understanding the Influence of Geography Paper

This paper investigated the differences in the energy-related behaviors, values and interests of consumers in rural, suburban and urban areas. The research revealed that American consumers tend to have more in common regardless of where they live.

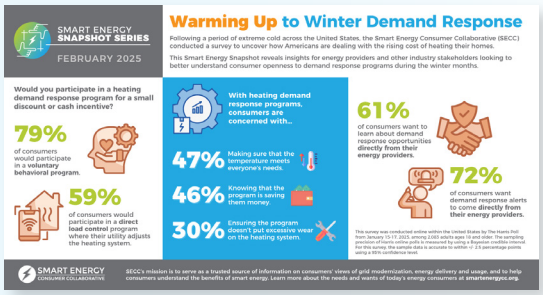
Smart Energy Snapshot Surveys

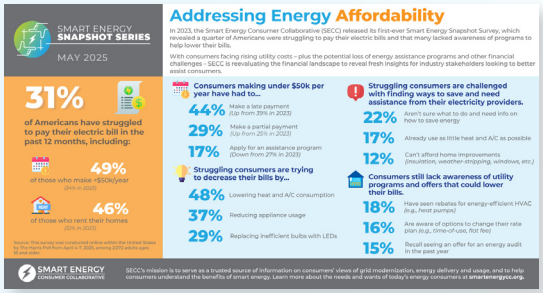
Introduced in the summer of 2023, this research series is designed to quickly capture Americans' thoughts on timely energy-related topics via brief, nationally representative surveys. In 2025, we completed three Snapshot Surveys:

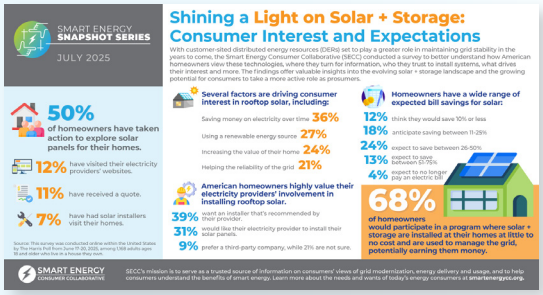
Warming Up to Winter Demand Response – The first Smart Energy Snapshot Survey of the year found that 79% of consumers would likely participate in a program where they voluntarily adjust their heating system for a small financial incentive during the winter.

Addressing Energy Affordability – Fielded to a nationally representative sample of 2,072 consumers, the *Addressing Energy Affordability* survey found that about a third of all Americans – and nearly half of renters and lower-income Americans – are now struggling to pay their electric bills.

Shining a Light on Solar + Storage – *The Shining a Light on Solar + Storage* survey found that about two-thirds of U.S. homeowners would participate in a solar + storage program where the technologies are installed at little to no cost and are used to manage the grid.







Case Study Highlights

Dominion Energy – *April 2025*

In early 2021, building on a legacy SMB program, Dominion Energy introduced the Small Business Improvement Enhanced program (SBIE). From June 2021 to June 2024, over 2,550 small businesses in North Carolina and Virginia participated in the SBIE program, saving approximately 8,476 MWh.

Evergy – *August 2025*

When the Missouri Public Service Commission ordered Evergy to transition every residential customer to a time-of-use (TOU) rate by the end of 2023, Evergy had just six months to develop, test and implement a technical, complex and multi-channel digital education initiative and only ten months to begin transitioning customers to the new rates.

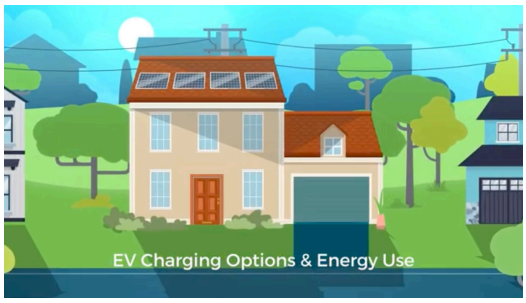
Oncor – *October 2025*

To address a high volume of questions from customers on important topics, like storm restoration and energy efficiency, Oncor developed the Ask branded traveling exhibit. This engaging program partners with community events to educate customers on Oncor and their role in the Texas electric market.

Education and Outreach Highlights

Driving the Electric Vehicle Conversation Video – *March 2025*

In this brief educational video, we walked consumers through the basic types of electric vehicle (EV) chargers for home use and explained why adjusting when they charge can help save them money with an EV-specific time-of-use (TOU) rate plan.



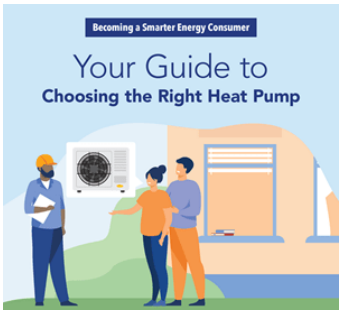
Questions to Ask: Electric Vehicles Fact Sheet – *March 2025*

This fact sheet in the Questions to Ask to Become a Smarter Energy Consumer series provides consumers with a set of questions that they can ask when looking to purchase an EV, including "What should I ask my energy provider about owning an EV?" and "How can I optimize my EV charging?"



Cooling Consumer Concerns on Heat Pumps Infographic – *June 2025*

This infographic continued our educational series on heat pumps by providing information for consumers to consider during the process of purchasing a heat pump, such as calculating the right heat pump size and estimating the cost of installation.



Shaping the Future: Consumers and the Energy Movement Paper – *June 2025*

This paper highlights utility programs, services and strategies for residential customers and SMBs organized around the three themes explored in the *2025 State of the Consumer* report.

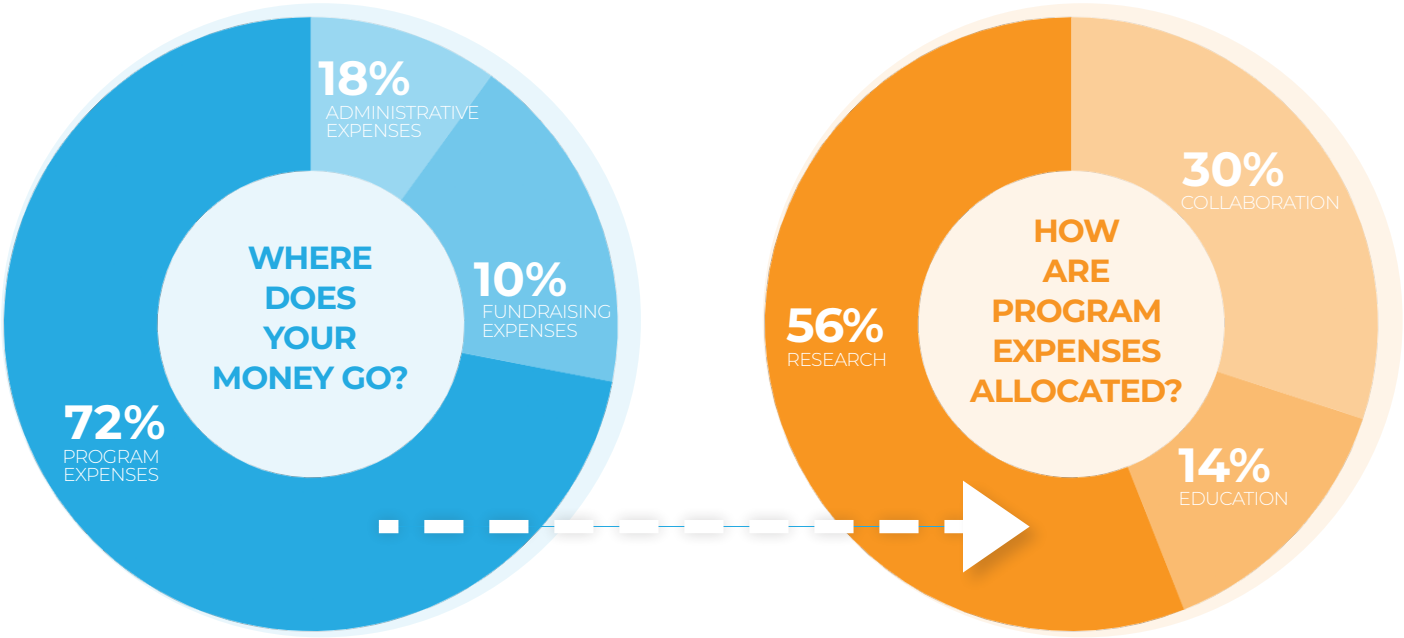


Your Role in Energy Management Brochure – *November 2025*

This printable trifold brochure – available in both English and Spanish – breaks down complex topics like rate plans, renewables, electrification and energy efficiency so consumers can better manage their usage and become smarter energy consumers.



By the Numbers



2025 Best Practices Awards

The recipients of the eighth annual Best Practices Awards were recognized at the 2025 Consumer Symposium at DTECH in Dallas. The six winners were selected by an independent advisory panel.

Arizona Public Service (APS) was honored with the **Smart Energy Innovation Award** for developing a virtual power plant that is helping maintain grid reliability and resiliency during extreme weather.

Alaska Village Electric Cooperative (AVEC) was recognized with the **Culture Transformation Award** for upgrading its payment operations to a digital-forward system.

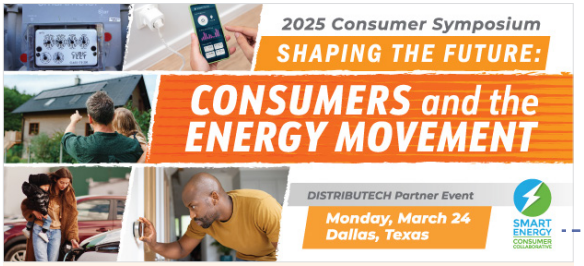
Cobb EMC was given the **Consumer Engagement Award** for reimagining customer communications in a manner that boosted program enrollment for paperless billing, energy efficiency incentives and more.

American Electric Power (AEP) was recognized with the **Energy Equity Award** for harnessing the power of predictive analytics and behavioral science to ease the energy burden for lower-income customers.

Evergy was honored with the **Consumer Education Award** for developing and launching a multi-channel and multi-tool education campaign that eased the transition to time-of-use rates.

Dominion Energy South Carolina was given the **SMB Engagement Award** for creating an energy efficiency program that provides financial assistance, educates business owners and ensures high-quality implementation.

SECC Events



2025 Consumer Symposium

We partnered with DTECH to present the 2025 Consumer Symposium in Dallas. The one-day event saw speakers from Itron, Con Edison, DNV, Consumers Energy and many more.



2025 Members Meeting

Hosted at Puget Sound Energy's headquarters in Bellevue, Washington, the two-day 2025 Members Meeting & Fall Workshop featured a keynote address from PSE's Aaron August.

2025

CONFERENCE APPEARANCES

To further awareness of SECC's consumer research and educational materials, we presented at more than 15 industry events in 2025, including:

- JANUARY
- FEBRUARY — EV Charging Infrastructure Summit
- MARCH — DTECH
- APRIL — Smart Energy Summit
- MAY — Landis+Gyr Exchange
- JUNE — Uplight Customer Connect
- JULY — DTECH Midwest
- JULY — SECC's Summer Summit
- AUGUST — AESP Flex Connect
- SEPTEMBER — EmPOWER AI Annual Conference
- OCTOBER — Itron Inspire
- NOVEMBER — WE3 Summit
- DECEMBER — Mid-West Electric Consumers Association 68th Annual Meeting

Webinar Highlights

In 2025, we produced eight webinars on our research reports and Smart Energy Snapshot Surveys. The November session on the *Meeting the Needs of Low-Income Households* paper was the most popular webinar of the year, with more than 160 registrants.

Speakers on our 2025 webinars included many member organizations, including Opinion Dynamics, CPS Energy, Touchstone Energy, NC Clean Energy Technology Center, ICF, Powerley, Vistra, Elevate and the Citizens Utility Board of Minnesota.



8 Live Webinars



700+ Registrations



15+ Guest Speakers

Membership Update

257 Co.
4Liberty
ABB
ACEEE
Advanced Energy
AES Ohio
Allconnect
Alliance to Save Energy
Alston & Bird
Ameren
American Municipal Power
American Water Homeowner Services
Arizona Public Service Company
Arkansas Public Service Commission
Austin Energy
Beneficial Electrification League
Bidgely
BlastPoint
Brookhaven National Laboratory
California Energy Commission
California Public Utilities Commission
Central Alabama Electric Cooperative
Chugach Electric Association
Citizens Utility Board of Minnesota
Citizens Utility Board of Ohio
Citizens' Utility Board of Oregon
CLEAResult
Cobb EMC
Colorado Public Utilities Commission
Colorado Springs Utilities
ComEd
Con Edison
Consumers Energy
CPS Energy
DNV
Duke Energy
Duquesne Light Company
Electric Power Research Institute
ElectriCities NC
Electrum
Elevate
EnergyHub
EnergySage
Enervee
Entergy
Eversource Energy
Environmental Defense Fund
Eugene Water & Electric Board
Fayetteville Public Works Commission
FirstEnergy Corporation
Future of Privacy Forum
Georgia Institute for Technology
Georgia Power
Georgia Watch
Great River Energy
Green Button Alliance
Greenlining Institute
Grid Forward
GridWise Alliance
GridX
Hawai'i Energy
Hydro-Québec
ICF
Illinois Citizens Utility Board
Itron
Jackson EMC
Landis+Gyr
Lawrence Berkeley National Laboratory
Leviton
Liberty
Massachusetts Department of Public Utilities
Michigan Public Service Commission
Middle Tennessee EMC
Midwest Energy Efficiency Alliance
Milepost Consulting
Minnesota Power
Minnesota Public Utilities Commission
Mississippi Power
Missouri River Energy Services
National Energy Technology Laboratory
National Grid
National Institute of Standards and Technology
National Laboratory of the Rockies
Natural Resources Defense Council
NC Clean Energy Technology Center
NC Sustainable Energy Association
New Brunswick Power Corporation
New Hampshire Office of the Consumer Advocate
North Carolina Association of Electric Cooperatives
North Carolina Utilities Commission Public Staff
NRG Energy
NTC Corporate
Office of the Ohio Consumers' Counsel
Office of People's Counsel (DC)
Ohm Analytics
Old Dominion Electric Cooperative (ODEC)
Omaha Public Power District
Oncor
Opinion Dynamics
Optiwatt
Oracle Utilities
Pacific Northwest National Laboratory
Peak Load Management Alliance
Pearl
Pecan Street Inc.
Peninsula Clean Energy
POWERCONNECT.AI
Powerley – A Convey Company
Public Service Enterprise Group
Public Utilities Commission of Hawaii
Public Utilities Commission of Ohio
Public Utility Commission of Texas
Puget Sound Energy
Purdue University
Questline Digital – DynaTouch
Rappahannock Electric Cooperative
Reading Municipal Light Department
Recurve
RUNWITHIT Synthetics
Sacramento Municipal Utility District
Saint John Energy
Salesforce
Salt River Project
Shrewsbury Electric and Cable Operations
Siemens
Smart Electric Power Alliance
Smart Energy Water
Southeast Energy Efficiency Alliance
Southern California Edison
Southern Minnesota Municipal Power Agency
Southface Institute
State of Connecticut Office of Consumer Counsel
State of Hawaii Division of Consumer Advocacy
Tacoma Public Utilities
Tennessee Valley Authority
Texas Energy Poverty Research Institute
Texas Office of Public Utility Counsel
Texas Renewable Energy Industries Alliance
The Harris Poll
The Nature Conservancy
Touchstone Energy Cooperatives
Trico Electric Cooperative
Tri-County Electric Cooperative (Oklahoma)
Tucson Electric Power
University of California, Davis (Energy and Efficiency Institute)
University of Southern California
Uplight
Utility Consumers' Action Network
Virtual Peaker
Vistra Corp.
Xcel Energy

As of 2/23/26

Not a member? Consider joining SECC and get access to this full report and the complete library of research we have conducted in the smart energy space.

Contact **secc@smartenergycc.org** for more information.

SMART ENERGY CONSUMER COLLABORATIVE

Working for consumer-friendly, consumer-safe smart energy

SECC's mission is to serve as a trusted source of information on consumers' views of grid modernization, energy delivery and usage, and to help consumers understand the benefits of smart energy.

Join @ www.smartenergycc.org