

Foresighting Forum 2017

#energyfuture2017

What the research is telling
us about energy consumers
Lynne Gallagher, ECA

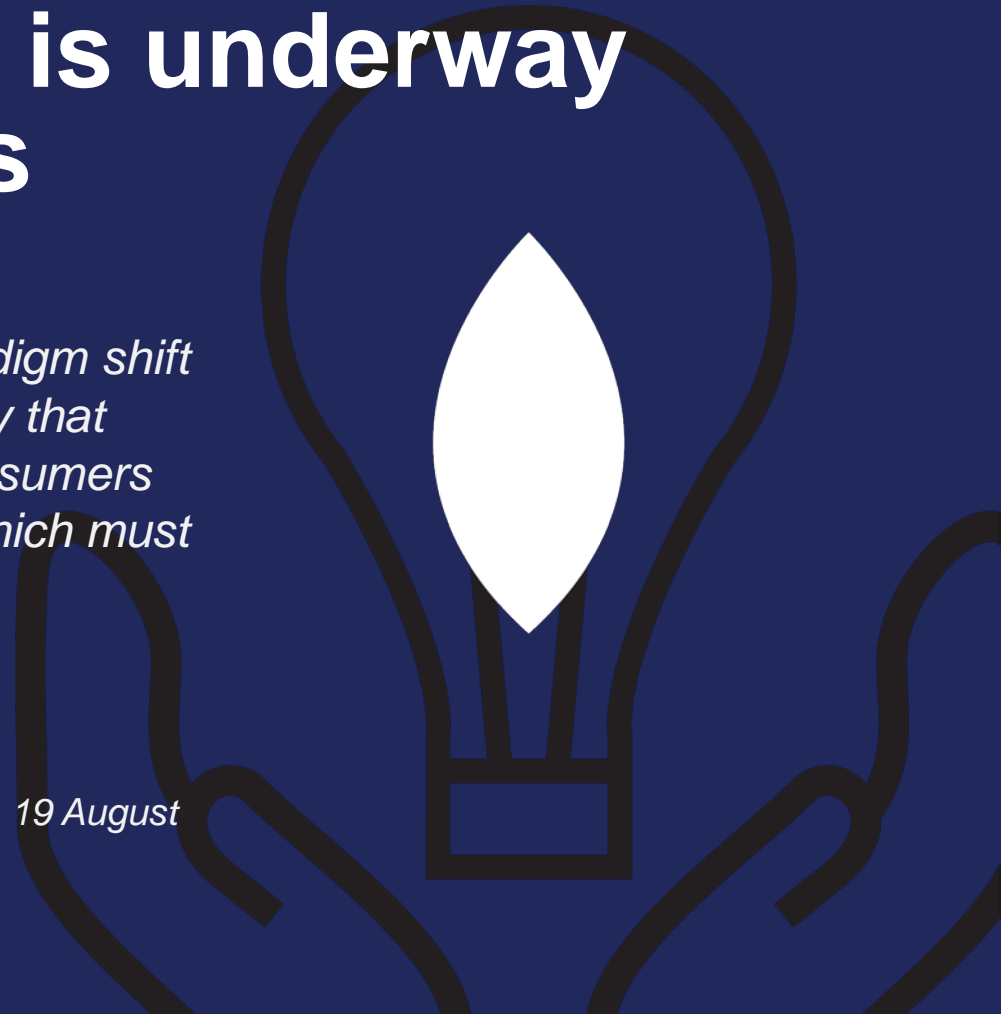


Profound change is underway in energy markets

There is a need to respond to this paradigm shift in energy markets and respond in a way that maintains the confidence of energy consumers and investors in our energy markets, which must be reliable, affordable and sustainable.

Business as usual is not an option.

*COAG ENERGY COUNCIL Meeting Communique, 19 August
2016*

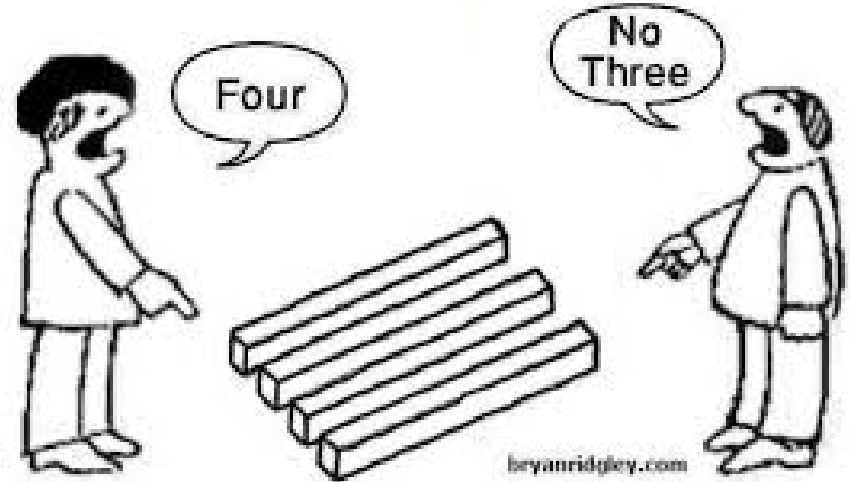


Consumer perspectives on energy markets

The Energy Consumer Sentiment Survey

- tracks changes in sentiment over time (bi-annual),
- detects patterns, and
- informs energy market and policy development,
- in the long term interests of consumers

Reality can be so complex that equally valid observations from differing perspectives can appear to be contradictory.

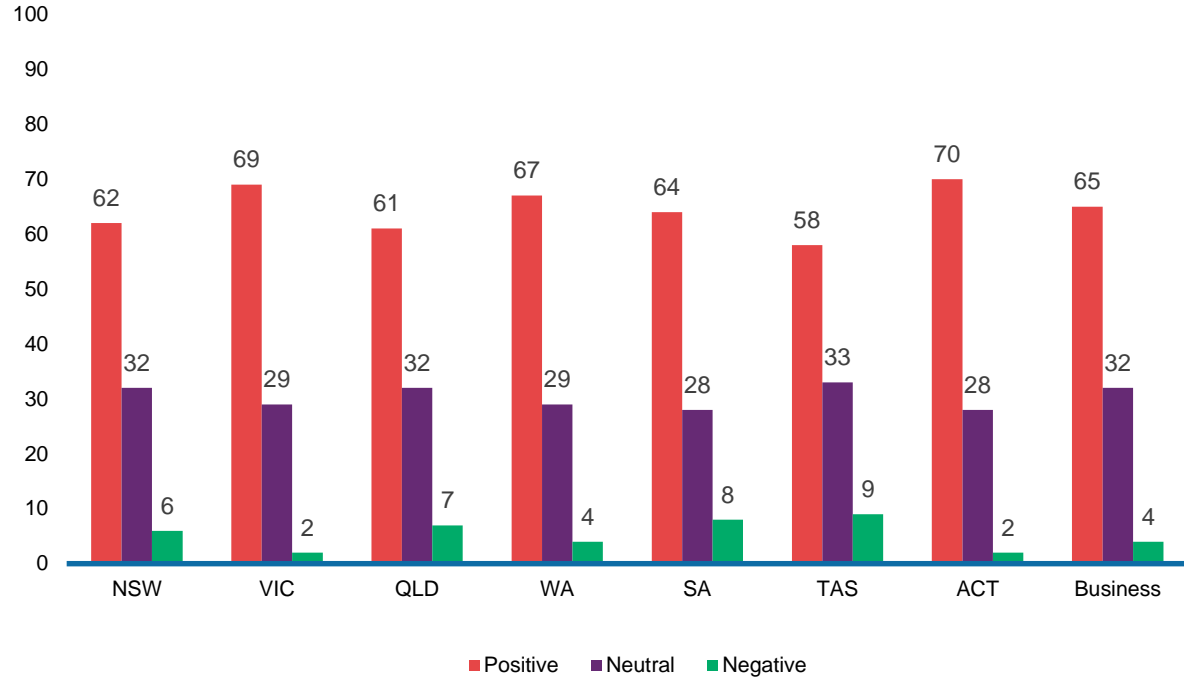


Key results

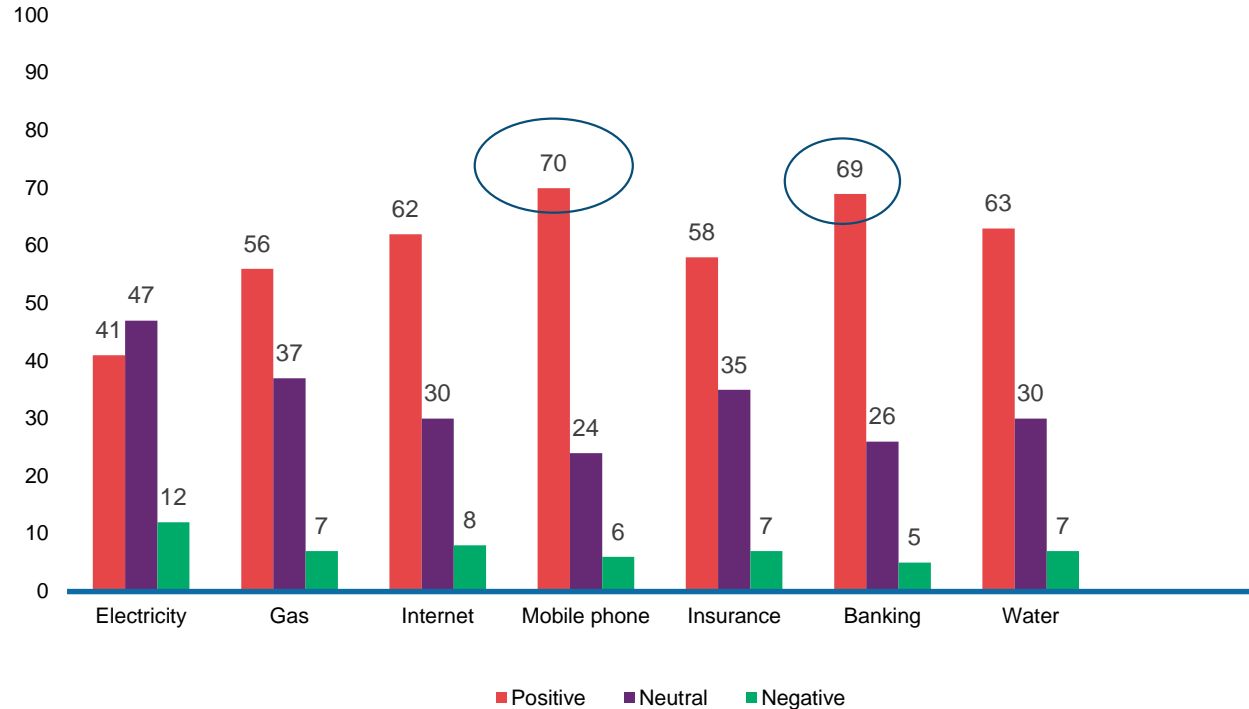


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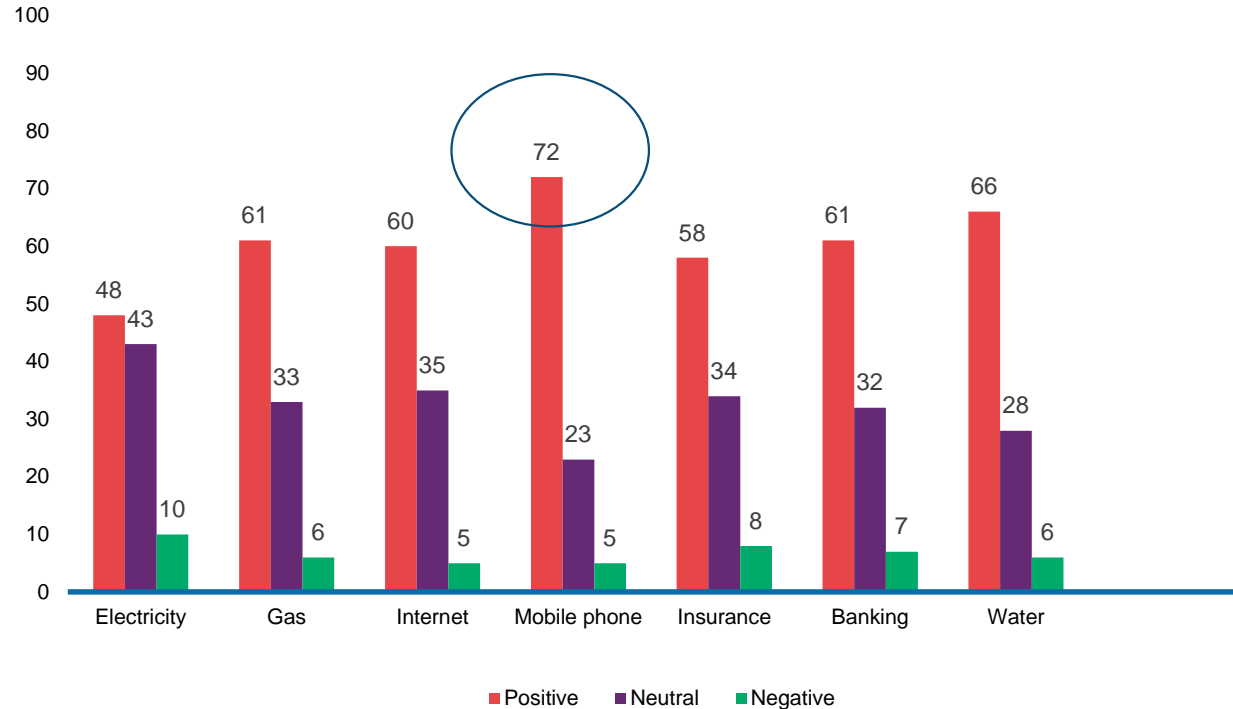
Overall satisfaction



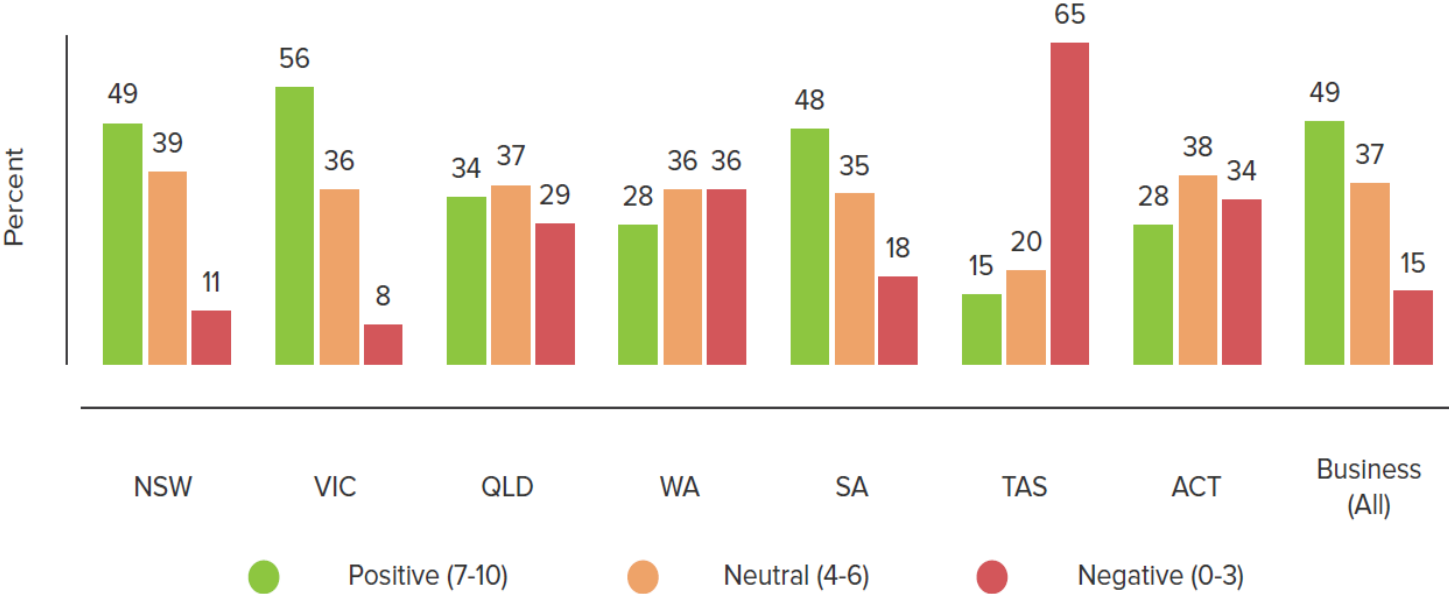
Value for money (residential consumers)



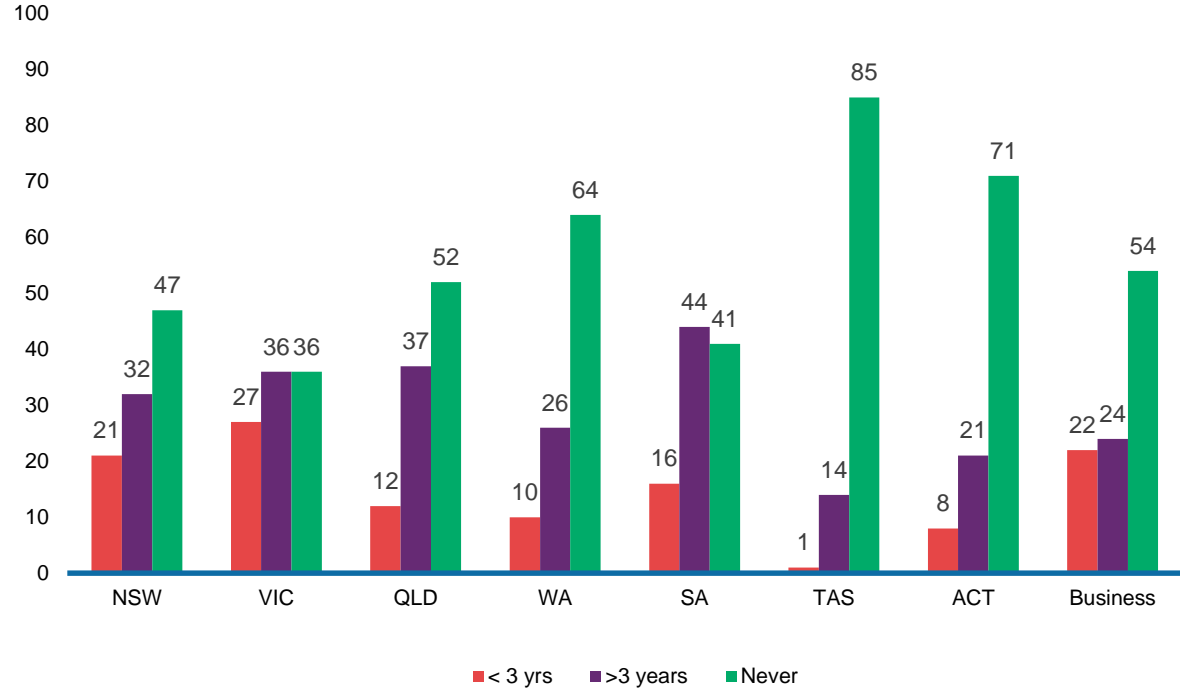
Value for money (small business)



Satisfaction with competition



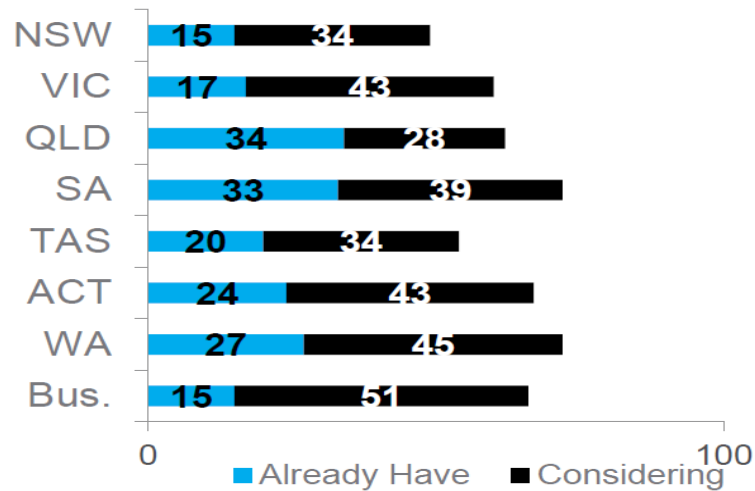
Switching providers or plans



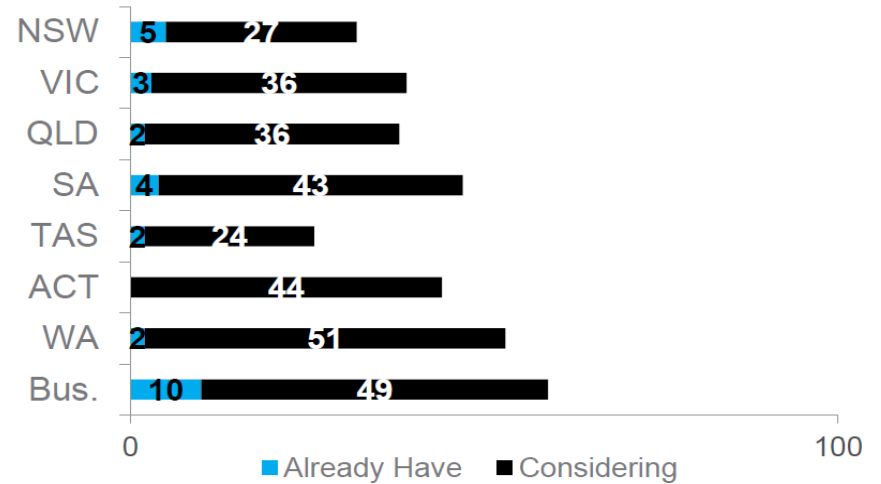
Cost and control



Rooftop Solar Panels



Electricity Battery Storage



Satisfaction

- Overall
- Level of competition
- Value for money
- Quality of Customer service
- Billing and account options
- Reliability
- Net Promoter Score

Activity

- Switching
- Investment in technology

Confidence

- Ability
- Availability of information
- Availability of tools
- Trust that the market is working in consumer interests
- Better outcomes in 5 years time

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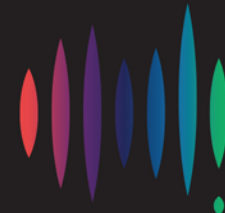
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