

RESEARCH OUTCOME REPORT INSTITUTIONALISING CONSUMER RESEARCH IN THE ENERGY TRANSITION

Thanks to the Gill Owen Scholarship and Energy Consumers Australia, Liz Fletcher met with experts across Europe, England and Australia in 2023 and 2024, exploring how consumer outcomes could be improved by institutionalising consumer research in the energy reform decision-making process.



SNAPSHOT

The global priority of energy system transformation

Transforming our energy system to address the pressing issue of climate change is a global priority but is occurring in an environment of misinformation and disjointed decision making. Europe and England have long led consumer centric energy reforms, as shown by Gill Owen's own work in Australia and England. Consumer advocates, reformers and experts worked together to put consumer outcomes at the forefront of decision making both to protect the vulnerable but to also maintain the sustainability of the economy.

Australia's unique approach to energy reform

Like most things in Australia, our reform process has proven truly Australian in its own unique way. Whilst we've leaped over many countries in the uptake of consumer energy resources, our reform mechanisms must evolve to embrace the increasing voice of consumers in the energy system. Australian consumers are now the owners of the largest energy generator with more than 20GW of rooftop solar installed across homes and businesses. To reach our legislated carbon goals, our energy system will need even more consumer input across significant reforms and a comprehensive suite of complementary measures. In turn, the way in which reformers considers consumers must shift from protecting the vulnerable and maintaining the stability of the economy to considering them as investors.

The challenge of integrating consumer needs

This new role of consumers brings a challenge for reformers - how do they understand and integrate the breadth of needs and wants? Other industries like pharmaceuticals and tech successfully institutionalise consumer research into reform processes to enable scale and bring an evidence based approach to consumer centricity.

The disjointed nature of Australia's reform process

However, our reform decision making process is disjointed - even in comparison to those in Europe and England - meaning navigating and streamlining decision making processes is difficult. This makes the task even harder for the consumer advocates that Gill Owen fought to establish in Australia.

Opportunities for enhancing consumer research in energy reforms

Analysis for this report showed that consumer research is happening - it just needs a level of maturity and governance to make its way to the decision making table. Further detail is provided on the current situation in Australia, opportunities for using consumer research more effectively and four requirements to maximise the benefits to consumers including case studies and some initial opportunities in the disjointed Australian energy ecosystem.

Evolving energy reform for a high CER future by institutionalising consumer research

This report will consider four requirements for better including the needs of consumers in the reform process and associated learnings:

- Continuing the evolution of the reform process
- Allocating dedicated resources
- Building consistent methodologies
- Elevating consumer research

RESEARCH OBJECTIVE

This research project emerged following more than 15 years of experience in and out of Australia's energy reform process. Motivated by the need to balance technical, commercial, and consumer perspectives in the energy transition, the project aims to pave the way for better integration of consumer research in reform decision making, accelerating our progress toward a net-zero economy.

Hypothesis: "That consumer outcomes will be improved by institutionalising consumer research in the energy reform process."

Research methodology and stakeholder engagement

In 2023 and 2024 Liz Fletcher held conversations with Australian experts in consumer research, energy policy and the reform process and reviewed several academic journals and public reports (key documents listed on page 17).

In October and November, Liz then held one-on-one discussions and attended various events across Finland, Denmark, The Netherlands, Germany, England, and France. Stakeholders involved included researchers, peak bodies, government representatives, regulators, consultants, advocates, and technology providers. This approach led to a streamlined summary of the learnings.

The report

This report aims to help reformers, consumer advocates, and innovators deepen their understanding of the role of consumer research in the critical reforms needed for achieving a net-zero economy.



About Liz Fletcher

Liz has spent the last 15 years working across the energy ecosystem. With a background in policy and marketing, Liz was actively involved in many hard conversations about the role of consumers in the transition such as minimum demand, consumer risk frameworks, and wholesale demand response. Liz is driven by the need to balance commercial viability, technical feasibility, and customer-centricity in the energy transition - which inspired this project.



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Diagram: breakdown of conversations

STONE OF CONVERSATIONS



Conversations were held across six countries, covering peak bodies, consumer advocates, researchers, energy experts and more.

01. Seize the moment

Shocks like war and price crises drive change and can be leveraged to rethink norms but we need a finger on the pulse of consumers needs to track the known unknowns.

02. Evidence breeds trust

Change is hard but consumer research can build the trust and evidence that the community requires.

03. Testing is more than risk management

Research provides the tools to test how a reform will be received but will also generate new approaches.

04. Australia is unique

Australia's disjointed decision making, market design and significant consumer investment in energy means learnings must be adapted.

05. New things are scary until they aren't

People will always distrust new ways of doing things - particularly in the reform agenda. Accusations of poorly designed research can be overcome by creating consistency.

06. Known unknowns are no longer reasonable

We have the tools to surface the known unknowns of consumer needs. It's on reformers and industry to embrace the insights as they do technical and commercial assessments.



Photo: Solar panels in London

CONSUMERS ARE DRIVING OUR ENERGY TRANSITION

THEN CONSUMERS WERE TAKERS IN THE ENERGY SYSTEM

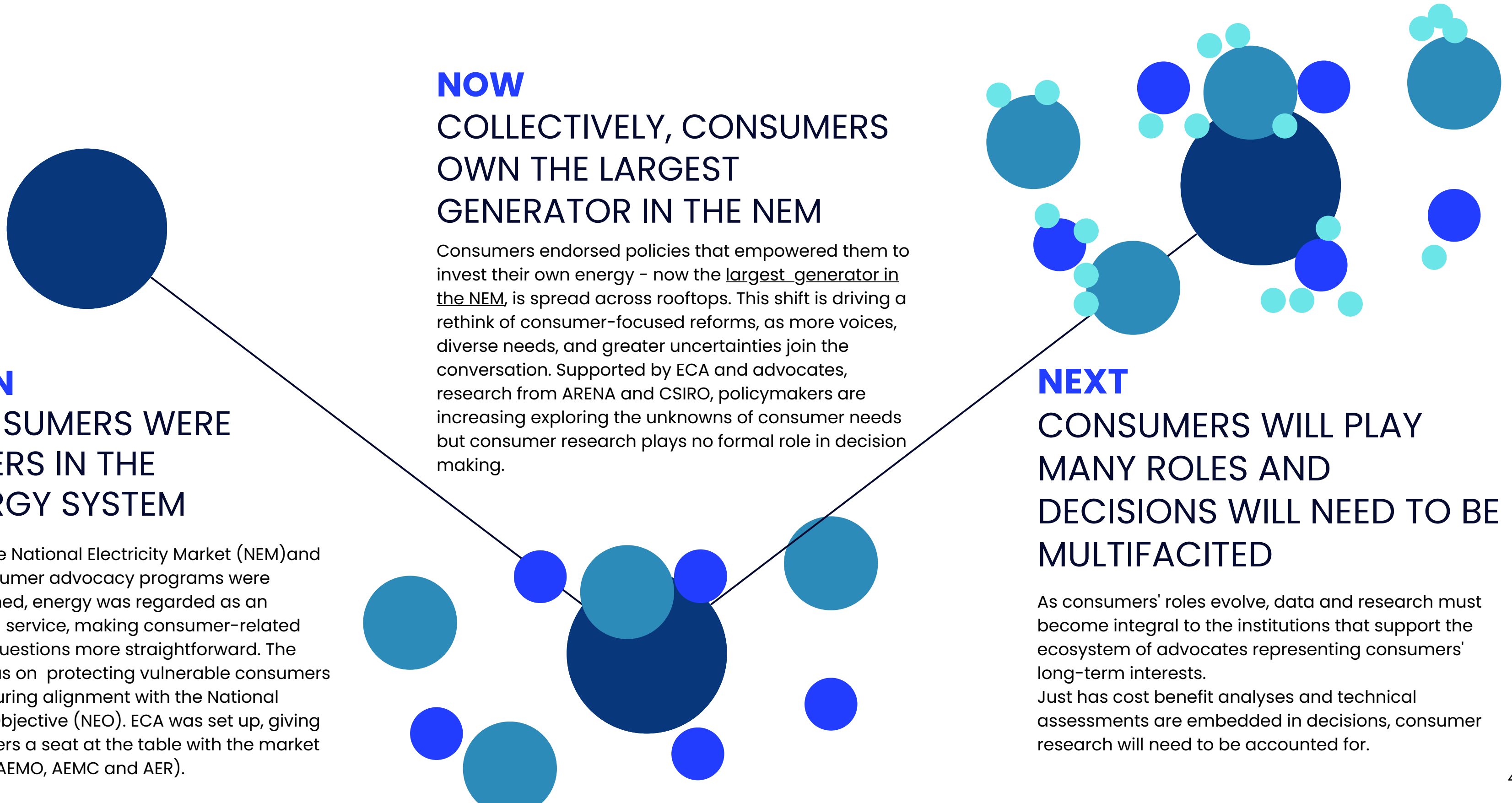
When the National Electricity Market (NEM) and our consumer advocacy programs were established, energy was regarded as an essential service, making consumer-related reform questions more straightforward. The focus was on protecting vulnerable consumers and ensuring alignment with the National Energy Objective (NEO). ECA was set up, giving consumers a seat at the table with the market bodies (AEMO, AEMC and AER).

NOW COLLECTIVELY, CONSUMERS OWN THE LARGEST GENERATOR IN THE NEM

Consumers endorsed policies that empowered them to invest their own energy - now the largest generator in the NEM, is spread across rooftops. This shift is driving a rethink of consumer-focused reforms, as more voices, diverse needs, and greater uncertainties join the conversation. Supported by ECA and advocates, research from ARENA and CSIRO, policymakers are increasingly exploring the unknowns of consumer needs but consumer research plays no formal role in decision making.

NEXT CONSUMERS WILL PLAY MANY ROLES AND DECISIONS WILL NEED TO BE MULTIFACETED

As consumers' roles evolve, data and research must become integral to the institutions that support the ecosystem of advocates representing consumers' long-term interests. Just as cost benefit analyses and technical assessments are embedded in decisions, consumer research will need to be accounted for.



CONSUMER RESEARCH IN AUSTRALIA'S ENERGY REFORM

Conducting research is increasing in prevalence in the Australian energy reform process. as reformers need to test decisions against the NEO and other risk frameworks, ensuring the long-term interests of consumers are protected. In parts of the sector, there are risks of over engagement and waste, increasing the need for formal institutionalisation of consumer research in the reform process. Here are some of the ways research is already included in the energy transition.

Knowledge sharing and innovation in energy research

- ARENA and other funders have their own versions of '[knowledge sharing reports](#)' and each reward novel approaches to research to push the innovation curve faster.

Government mandates for consumer research

- State and Commonwealth Governments are mandated to conduct consumer research when spending money on [advertising](#) to ensure maximum return on tax payer's investment.
- The expectation for engagement on transmission projects and network revenue proposals has grown to include [research](#) to build social licence.

Early stage policy research and sector-wide application

- Policy makers will often conduct [research](#) during the early stages of policy making to test ideas and understand the volume of need. This will sit alongside technical and commercial regulatory impact statements.
- Many parts of the sector (such as [retailers](#) and even [reformers](#)) use consumer research to argue their case.

Bringing international models and academic contributions

- CSIRO and the Commonwealth are bringing the UK's Energy Systems Catapult [Living Lab](#) to Australia.
- [Academics](#) work with industry to build an evidence base for change.

"We have endless insights on our customers. The challenge is having the right channels to pass it through to reformers."

- Australian energy retailer

"Research gives us raw data on what is actually happening on the ground - because sometimes we can't actually ask those questions in person."

- Australian policy maker

"Even if we received all the data from industry, we wouldn't have the skills to analyse it."

- Australian reformer

Photo: Solar panels in the Netherlands



BRIDGING THE GAP: INTEGRATING CONSUMER ADVOCACY INTO ENERGY REFORM DECISION-MAKING

In the complex landscape of energy reform, incorporating consumer research into decision making is crucial for achieving long-term, sustainable outcomes.

However, despite the importance of understanding consumer needs, this research often remains isolated within advocacy and social science circles, rather than being fully integrated into the core of reform processes.

As Australia faces mounting challenges from rising living costs, climate change, and political uncertainty, it is essential to bridge this gap and ensure that consumer insights are as central to reform decisions as technical and commercial data.

The legacy of Gill Owen's advocacy

Gill Owen's own efforts in integrating [consumer advocacy](#) into Australian and the UK's energy reform were a significant step in helping reformers understand consumer needs in the energy sector.

However advocates still shoulder the task of 'representing consumer perspectives' when [real data is readily available](#) and advances in data management provide new use cases for reducing assumptions and uncertainty and increasing the chance of success in transition to a net-zero economy.

Case study: Queensland REZ framework

As part of the design of the Renewable Energy Zone Framework, the [Queensland Government](#) surveyed and interviewed more than 1,500 people about their thoughts on the energy transition.

Consumer outcome: Insights from research meant the framework was designed with enough flexibility to reflect varying preferences across the State. Modifications were made to the policy and the legislation that passed parliament in 2024.

Photo: Pop up solar store in London



THE NEXT STEP IN ACCELERATING REFORM

Reformers need to move faster, smarter and harder to continue to deliver the energy transition and support consumers' increasingly active role. Research conducted under this scholarship showed that key to reaching this goal is taking consumer research from a haphazard disjointed approach to a institutionalised approach that embeds research in the same way as commercial and technical insights are.

Benefits of institutionalised consumer research

To navigate change: In [2023](#), Harvard Business Review found the world's biggest organisations integrated data to better make decisions during periods of crises. Those who pro-actively embraced new data points 'outperformed their peers' in operational efficiency, revenue, employee satisfaction and a range of other metrics. Outstanding results were seen by those who 'institutionalised' data about their customers in the same way that financial, market and other insights fed decision making.

To bring people together: [Dr. Johan Schot](#) of Utrecht University, a key figure in much of our existing policy design theory, has analysed major global transitions and demonstrated that consumer research is crucial for building trust during periods of significant change. Dr. Schot and his colleagues have examined reform programs across multiple countries, finding that incorporating research fosters unity and leads to a more harmonious reform process.

To improve consumer outcomes: In 2014, Dr. Christa Wood from the University of Wollongong found [positive correlations](#) between the outcomes from reformers and increasing visibility of consumer needs. Christa's work focused on the importance of our reform organisations having a consumer service orientation to ensure reformers have the right motivations and morale.

*"We use data in every decision we make in our product development and even our advocacy."
- German energy technology company*

*"Evidence and engagement builds trust as communities transition through change."
- Dutch researcher*

*"We saw how heavily regulated sectors like pharmaceuticals could fast track decision making during the pandemic... we now have an opportunity to bring that systematic approach into our processes to mitigate climate change."
- English researcher*

Case study: Finland's uptake of Heat Pumps

Finland has been outpacing the UK in uptake of heat pumps in domestic heating systems - 1m units sold across just over 3m households since 2000 vs. only 160-200k units being sold to the more than 26m homes in the UK. Researchers retrospectively [analysed](#) the policy frameworks of the two countries finding that Finland's success came from the deep user experience research included in the policy design process.

Consumer outcome: Electrification of heating systems brings down costs and carbon impact. Careful user experience design and testing removed hurdles and delivered a more successful policy.

SIX USE CASES FOR RESEARCH IN ENERGY REFORMS

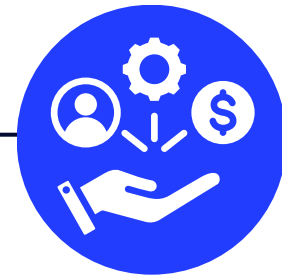


REQUIREMENTS FOR EMBEDDING RESEARCH IN ENERGY REFORM



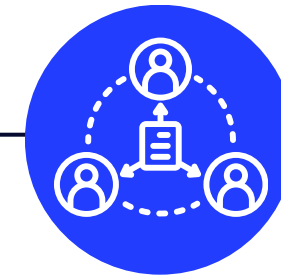
CONTINUING THE EVOLUTION OF REFORM MAKING

Integrate research into the daily operations of our systems to ensure that they remain aligned with the changing role of consumers



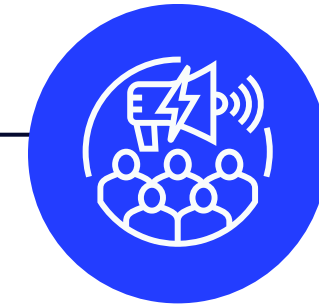
ALLOCATING DEDICATED RESOURCES

Incorporate research into the decision-making process, with dedicated resources allocated to support it.



BUILDING CONSISTENT METHODOLOGIES

Streamline operations to minimise the burden and cost on consumers while maximising the impact of research.



ELEVATING CONSUMER RESEARCH

Highlight and value research as a tool to combat misinformation, and build trust to encourage its continued use in the reformers' toolkit

CONTINUING THE EVOLUTION OF REFORM MAKING

With the role of energy consumers changing, the reform process is evolving. The latest [Integrated System Plan](#) underscores the potential for orchestrated batteries to offset the need for \$4.1b in additional grid-scale investment, making them essential to achieving our carbon goals.

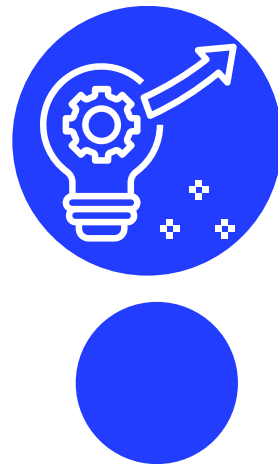
Embracing evidence-based decision making

Evidence-based decision-making is becoming the standard approach to reform across various sectors. To accelerate the evolution of reform, the Commonwealth has established a '[Policy Projects and Taskforce Office](#)', similar to an initiative in the Finnish Government. Additionally, the NSW Government has created a dedicated [Behavioural Insights Unit](#) to enhance processes and expand opportunities for stakeholder engagement.

There remain ongoing opportunities for other aspects of the energy reform process to advance alongside consumer advocates. However, during this project, some scepticism toward consumer research emerged. Upon further investigation, it became apparent that this scepticism often arose when the research was either novel, perceived as a opaque, or conducted by an organisation with a vested interest.

Institutionalising consumer research in Australia

Australia's fragmented decision making process may offer unique opportunities to institutionalise research. With fewer stakeholders involved compared to international contexts, it could be easier to align consistent consumer research across key decision-making points.



Opportunity

Coordinating Network Service Provider (NSP) Consumer Engagement

NSPs already undertake extensive consumer engagement and research during revenue resets. By aligning their efforts on segmentation, research questions, and data storage, these organisations could provide more cohesive insights to the Regulator and Consumer Challenge Panel, enhancing their understanding of proposals and local consumer needs. Standardising this process would not only lower costs but also enable the Regulator to repurpose the research more effectively.

Key points:

- Consumers are no longer a monolith
- Data is needed to unpack what reformers are yet to understand
- Research can rebuild trust in the reform process

"How do we know that they've got the research right?" - English policy consultant

Case study: Centralised policy impact assessments in Finland

The Finnish Government conducted deep policy impact assessments across the economy as part of [Carbon Neutral Finland 2030](#). Funded by the Office of the President, a series of alternative narratives and quantitative scenario assessments were constructed to research climate targets and were delivered by [academic institution, VTT](#). Each scenario was tested for technological, commercial and consumer feasibility. Under Finnish law, all policies must have a policy impact assessment. The level of detail depends on resources.

Consumer outcome: Due to strong consumer testing the Finnish Carbon Neutral Policy landed with success. Messaging and impact was measurable over time meaning that implementation plans were in line with consumer expectations and easily comprehended.

ALLOCATING DEDICATED RESOURCES

Dispersing reform decision-making across Australia's energy system makes it challenging to establish a cohesive, consumer-centric view of ongoing changes. Additionally, coordinating and resourcing consumer advocacy becomes increasingly complex to amplify the consumer perspective.

Ofgem's centralised approach in the UK

In contrast, Ofgem holds the pen on many of the tasks spread across AEMO, AER and AEMC in the the UK. Ofgem funds a dedicated research team. The team sits in the strategy function, allowing the team to deliver research that supports better decision making. Taking ownership of the function has allowed Ofgem to build a culture of research. Staying n the UK, the Energy Systems Catapult drives collaboration between policy makers and innovators by having research at its core. While it is not part of the Government per se, it is part of the institutionalised governance process to ensure regular communication back into the relevant departments.

Australia's view

Returning to Australia, ECA is pivotal in representing the interests of consumers as well as supporting the growth of advocacy. The organisation has adapted to and will continue to bring a wholistic consumer centric view to relevant reforms. Call this a *top down view*. Australia supports innovators through the Clean Energy Finance Corporation and Australian Renewable Energy Agency. These organisations have access to the innovators and insights that can be passed back through to our decision makers - call this a *bottom up view*. as has been done through the regulatory sandboxes in the EU and the UK. Having the first initiative through the sandbox, the AER does note that new regulations are rarely needed in Australia thanks to our risk based regulatory approach.

Debates on responsibility for consumer research

Throughout discussions with sector stakeholders, there was debate about who should be responsible for consumer research in the Australian energy system. The conclusion was that responsibility depends on the specific decision and timeframe. However, there was unanimous agreement that consumer research is essential, and the sector should move forward with implementing it and praise for work already underway by CSIRO and ECA.



Opportunity

Cement top down holistic consumer view with research being done by CSIRO and ECA

Securing funding for this research will provide decision-makers with a continuous understanding of consumer needs, ensuring more informed and responsive decision-making. This approach will solidify a consumer-centric focus and foster an adaptive environment where policies evolve with consumer expectations.

Key points:

- Responsibility for research needs to be purposeful and clear
- A top down view of consumer outcomes can come through research

“Under the previous government, there was a dedicated fund for research across all policy areas that sat within the Department of Prime Minister.”

- Finnish researcher

Case study: UK Regulator leveraging research for urgent reforms

Consumers in the UK and Europe have experienced significant price increases, moving more people into the vulnerable category. In October 2023, Ofgem, the regulator, shifted requirements of how retailers communicate with vulnerable customers from voluntary to mandatory following fit for purpose testing with vulnerable customers and collaboration with [Oxford](#) researchers. Ofgem released the research alongside the updated regulation.

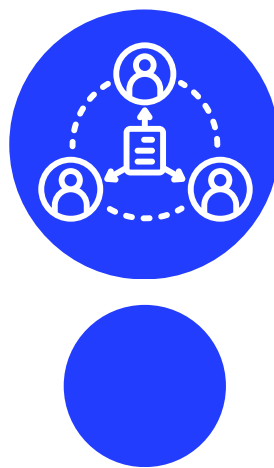
Consumer outcome: Ofgem having an existing skilled resource in their organisation allowed them to respond at pace to the consumer need. Internal experts collaborated with reformers to design a research program that would be fit for purpose.

BUILDING CONSISTENT METHODOLOGIES

Conversations both in Australia and internationally revealed strong support for incorporating consumer research into the reform process, but many highlighted challenges related to practical implementation. Concerns were raised about the consistency, efficiency, and timeliness of insights, which also reflected scepticism around the design of the research. Some policy experts even suggested that research is often about "asking the right questions just to get the answer you want."

These challenges are not new. Similar hurdles were encountered when standardising other forms of policy impact assessments. The solution lies in establishing norms and common methodologies to address these challenges effectively.

- **Streamlining research:** Many reported timeliness and cost as the major hurdles in conducting research. Both can be reduced by having a standard processes agreed up front as seen in the Horizon 2020 Nudge Project (see case study)
- **Independence and transparency of research:** Organisations like Citizen's Advice (UK) and Concito (Denmark) frequently produce reports to support policy positions. This research is tailored to advocate for specific stakeholder groups.
- **Defining research needs:** For those without a research background, the term "research" can be interpreted in various ways. Organising research into a straightforward toolbox (see page 8) helps different stakeholders understand the purpose and methods of research in supporting the reform process.
- **Collaboration between academia, reformers and advocates:** Establishing a common language around research can help bridge gaps between different expertise, aligning interests towards achieving positive consumer outcomes and reducing tensions related to scope and timeframes.
- **Maximising engagement:** With so much reform occurring, numerous areas within the fragmented decision-making ecosystem require consumer insights. Implementing common methodologies could enable the re-use of insights across projects, departments, and regulators.



Opportunity

Develop a bottom up consumer perspective by linking funding to research

ARENA and other funding bodies already require recipients to engage in 'knowledge sharing activities.' Standardised questions could be integrated into all funded projects, with the results shared with decision-makers to align with the funding objectives. Additionally, consider reducing incentives for projects that pursue novel approaches to measuring consumer outcomes.

Key points:

- A common language will fast track decision making
- Funding needs to incentivise consistency

"We don't have the scale or budget to truly understand stakeholder needs... and if we did, that would lead to over engagement." – North American transmission service operator

'Research done for a single purpose can't be used for the next piece of work. That is why we are building statistically sound testing ground for providers to test in' – British researcher

Case study: EU Horizon 2020 Nudge Project

The [Nudge project](#) ran across five countries under Horizon 2020 to test varying behavioural nudges for energy efficiency. The project had strong investment, academic rigour and sample size. A survey provided a benchmark for comparing the various interventions. Researchers observed that a significant portion of project time and funding was allocated to developing research methodologies, as projects are incentivised to adopt novel approaches.

Consumer outcomes: The project showed how common methodologies across projects could increase the impact of results and focus resources on maximising reach.

ELEVATING CONSUMER RESEARCH

During this project, it was clear that consumer research is rarely gets the kudos it deserves for its role in the reform process, even though it brings much-needed objectivity to an area that's becoming more and more politicised—just like technical and commercial information does. This lack of recognition happens because consumer research isn't fully integrated into the institutions that make reform decisions. Plus, it's not often taught (as mentioned in the Australian Policy Handbook), so even when reformers have the resources and responsibility to ask consumers what they need, they may not know how to properly plan, conduct, analyse, or present research.

There was also a perception that consumer research could be mistaken for 'polling.' Researchers noted that transparency of results is crucial in maintaining the integrity of decision-making. In fact, publishing research alongside decisions could actively combat misinformation and enhance trust.

The connection between research credibility and consumer advocacy

The credibility of consumer research is closely linked to the work of consumer advocates. Advocates can lend their credibility to research efforts and, in turn, rely on data to strengthen their arguments. For example, Energy Consumers Australia consistently uses real data to support its advocacy with reformers. When reformers release consumer research alongside commercial modelling, they amplify the voices of diverse consumer perspectives across their jurisdiction. A noteworthy example of collaboration in consumer research can be seen in the work done by Ofgem and the University of Oxford on vulnerable customers, as discussed in the case study on page 11.

The importance of elevating and normalising research

Celebrating and normalising research as a critical tool in the reform process will help counter misinformation and unify perspectives on consumer issues. The Deep Transition Network's analysis of transitions across economies has shown that data from research plays a vital role in building trust during transitions. Repeatedly demonstrating that decisions are based on credible research has supported strong policy-making.

In Australia, work is already underway by the CSIRO and Commonwealth Department of Climate Change, Energy, the Environment, and Water to enhance how policymakers can access insights as part of regulatory impact statements and ongoing decision-making.



Opportunity

Build a training course for research in reform

Expand the University of Melbourne's 'Foundations of the Energy Systems' course to include consumer research, making it accessible to reformers, experienced advocates, and innovators. This would help reinforce the common methodologies being developed within the system.

Key points:

- Consumer research should be elevated as evidence alongside technical and commercial
- There needs to be an increase in consumer research understanding among reformers

"I can't translate the results into something that will cut through" – Australian policy maker

"They should just tell us what format they need the research in" – British researcher

"Policy makers come to us too early or too late in the process" – Danish researcher

Case study: [UK Energy Systems Catapult](#)

To spark R&D growth in decarbonisation, the UK Government established the Energy Systems Catapult. Now with a broad ecosystem of services that bring innovators together with regulators to test consumer outcomes, technical parameters and commercial viability, the Catapult has repeatedly facilitated research centric alignment.

Consumer outcomes: When reformers, researchers and innovators are able to work together, each can deliver their piece of the reform agenda faster. A faster policy turn around means that they can be adapted to changing consumer needs just as done in other sectors.

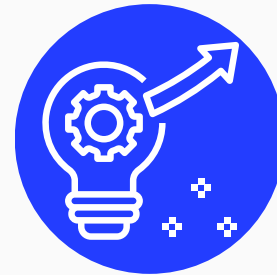
CONCLUSION AND RECOMMENDATIONS

The transformation of our energy systems, driven by consumer empowerment and technological advances, demands a new approach to reform. Institutionalizing consumer research is essential, ensuring decisions reflect the needs of those driving the transition. By embedding consumer insights into policy-making, we can create a more resilient and inclusive energy system. This report outlines four key requirements for advancing consumer-centric reform:

- 1. Continuing the evolution of reform:** As consumers take on more active roles, reform processes must adapt to their diverse demands by integrating consumer research with technical and commercial assessments.
- 2. Building consistent methodologies:** Establishing common methodologies for consumer research will improve decision-making and the quality of insights.
- 3. Allocating dedicated resources:** Adequate funding and dedicated teams are crucial for integrating consumer research into every stage of reform.
- 4. Elevating research:** Enhancing relationships between researchers, policymakers, and advocates ensures consumer research remains central to reform efforts.

Incorporating consumer voices into energy reform not only meets carbon targets but ensures the journey toward net zero is equitable. With organizations like ECA, ARENA, and CSIRO leading the way, now is the time to institutionalize consumer research to build trust, reduce uncertainty, and drive meaningful change. It is crucial for reformers, advocates, and innovators to work together to ensure consumers continue to drive the energy transition, leading to a sustainable, consumer-focused future.

The opportunities



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Develop a bottom up consumer perspective by linking funding to research

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Build a training course for consumer research in reform

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Thank you to ECA, David Green and the many other experts who gave up their time to share their knowledge.

I wish Australia's consumer advocates, researchers and reformers all the best in the energy transition.

You truly are changing the world every day.

KEY REFERENCES USED IN THIS PROJECT

Links are provided throughout this document to sources and references. Below are some of the pivotal reports and documents referenced as part of the research

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Terms used in this report

Consumer research: data driven insights about how energy users (big and small) want and need to interact with energy.

Institutionalising: describes a scenario where consumer research is embedded in the reform decision making process. Noting the disparate decisions being made across the sector, this may take many forms but key is that consumer research sits along the technical and economic assessments used to assess options.

Policy Window: when a problem is well understood by government, experts and the broader community; a solution is available and feasible and the political will is forthcoming.