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Customer Considerations for the Utility of the Future

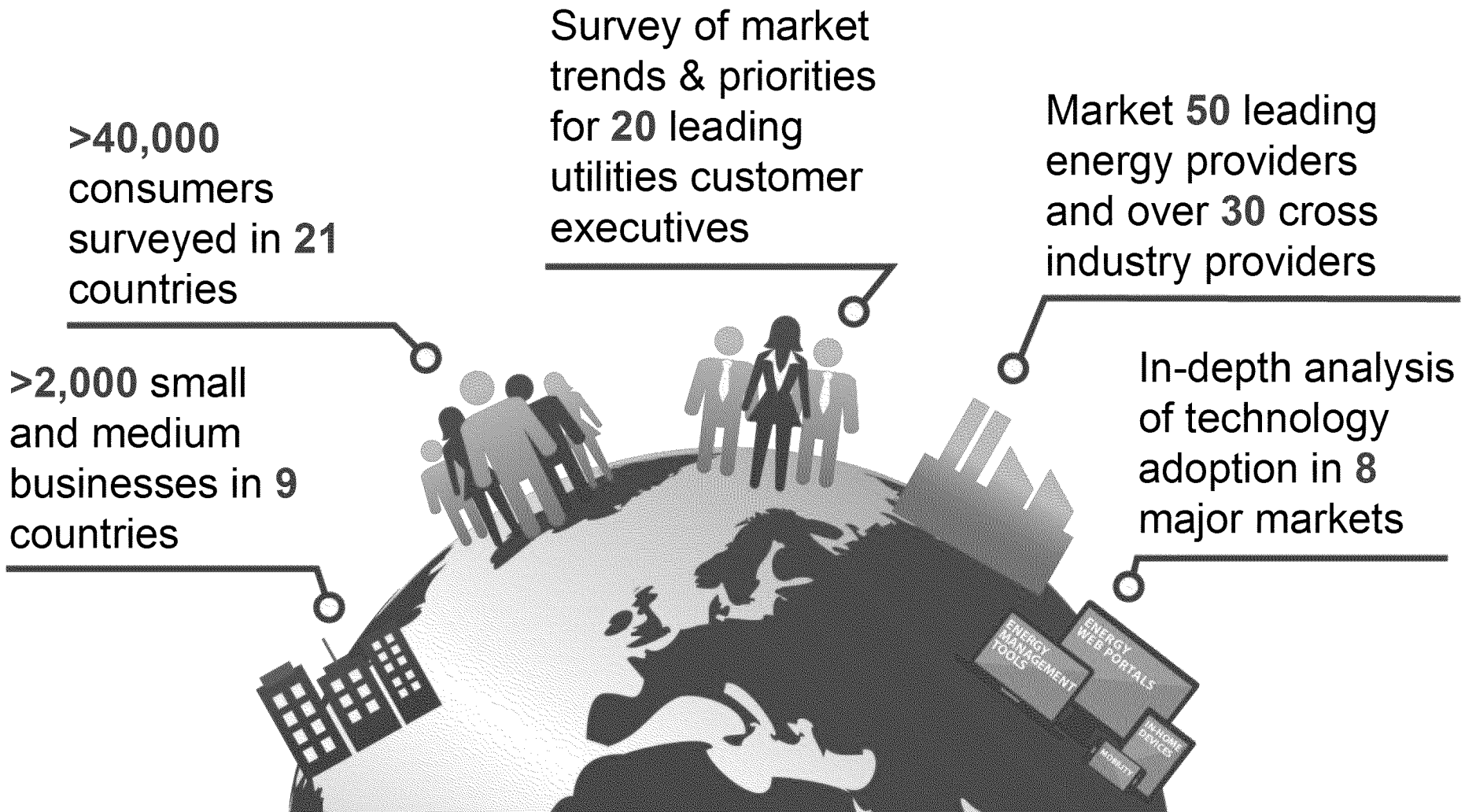
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CPUC en Banc
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Accenture's New Energy Consumer Research Program



Consumers Increasingly Fragmented Needs & Preferences

“I expect my energy provider to give me **simple, easy-to-use choices.**”

“I’d like a simple **‘bundle of services’** that saves me time and money!”

“I prefer the **convenience of self-serve** for nearly all my needs.”

“I would pay more to have my power come from **renewables.**”

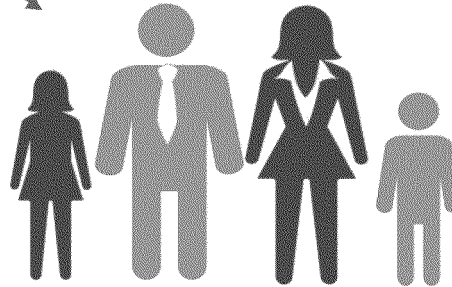
“Why can’t my provider be innovative and offer me **new technologies** for my whole family?”

“Why can’t my provider **proactively** tell me about **specific opportunities** to reduce my bill?”

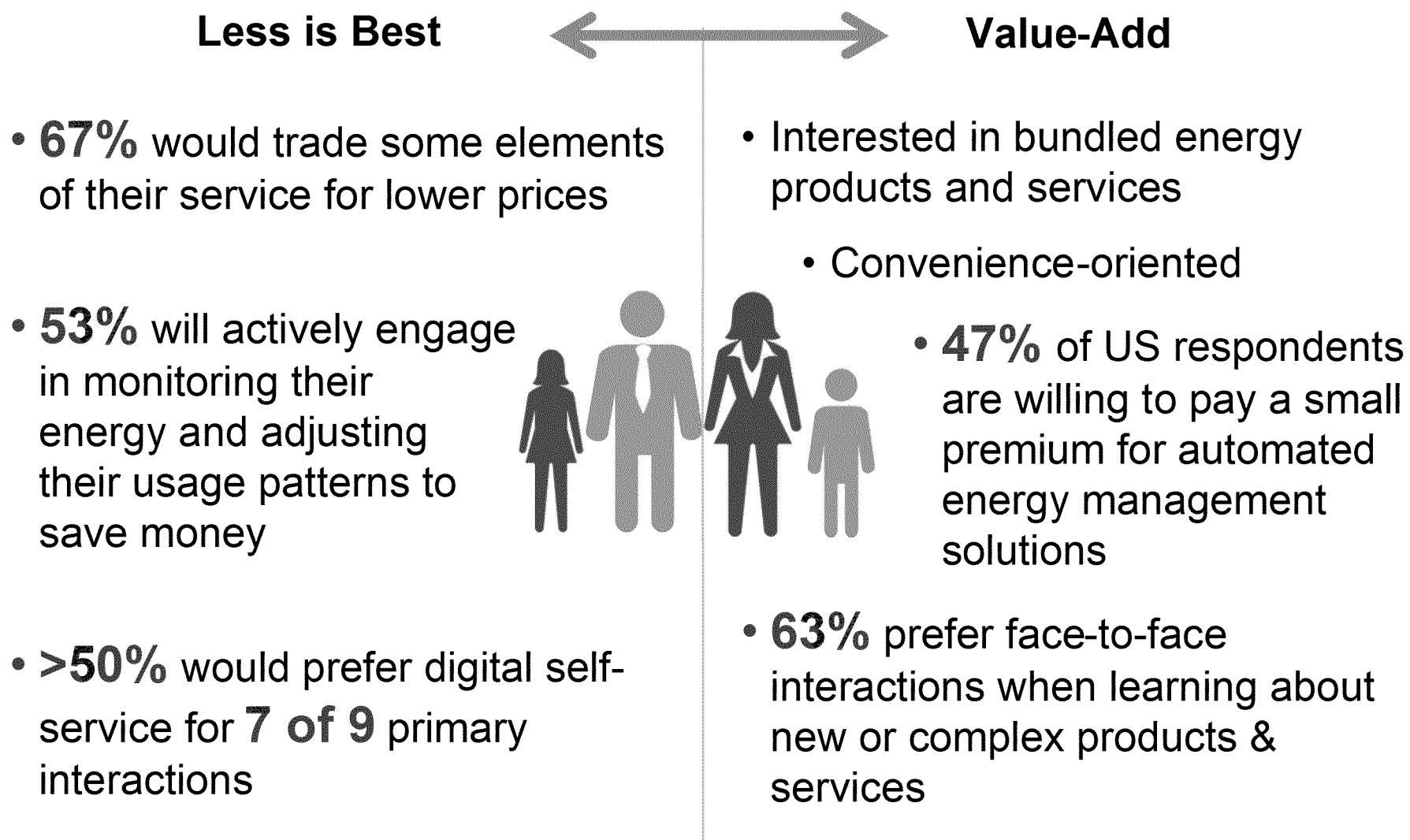
“I would like my provider to offer me **bundled Home Energy Solutions**”

“I want my provider to offer **seamless solar options.**”

“I rarely talk to my provider and would prefer **web only service** if I could get a discount.”



Wide Spectrum of Consumer Needs and Preferences



Key Considerations

1

Simplify for Market Agility

Elimination of layers of historical complexities will reduce the ‘Economics of Dissatisfaction’ and benefit both the consumer and the energy provider alike.

2

Embrace Short-Cycle Innovation

New technologies and digital interactions will require quick and iterative development to continuously adapt to shifting consumer preferences.

3

Encourage Broader Market Participation

To engage and attract the broadest group of consumers to ‘bundled’ energy services, more flexible models for both new entrants –and- incumbent utilities should be considered.