It is evident that today’s consumers, in any sector, have little or nothing in common with the consumers of twenty or twenty-five years ago. This new profile is the result of numerous circumstances, in many cases inherent in the evolution of life and the progress of society, in other cases related to the evolution of the sector itself and all the other sectors that make up the economy.

This “Energy consumer trends” study identifies the main characteristics that define the new consumer and explains the vision of the companies in the sector regarding how global trends affect them.

Companies are focusing on consumers’ expectations for an increasingly more personalised experience. To do so, they have more data from their customers, who are willing to share their personal information and life habits as long as they receive a benefit in return; in other words, companies know them better and provide them with products and services adapted to their needs. This consumer/company relationship evolution is taking shape in aspects such as “digitalised” customer service, self-management by consumers and proactive advice.

It also shows how the arrival of new technologies and digital transformation change the pace of traditional electricity companies. The speed of external changes and standardised internal processes in these companies mean that new ways of working to develop products and services that take full advantage of these new technological capabilities need to be found. The way to approach these new technologies, in many cases, involves opening up work teams and internal processes to third parties.

The extent to which the reality of energy consumers this should continue to be influenced by the expectations imposed from other sectors that can evolve faster and set market standards remains to be seen. Technology and digitalisation as well as social values are generally the most prioritised key aspects in this study, although there is a need to be vigilant to determine whether energy companies effectively focus on these action lines or whether they opt for other initiatives identified that may be differentiating in the sector. In any case, the results of this study show a high level of dynamism among the different energy companies.

Best regards:

Héctor Pinar
everis Energy Partner
This report has been made possible thanks to the participation of the following entities:

Spanish Energy Club
EDP Spain
Endesa
Fené Energía
Gas Natural Fenosa
Holaluz
Lucera
Podo
Unesa Spanish Electrical Industry Association
Viesgo
1. Consumer evolution
   1.1 Energy consumers 25 years ago
   1.2 Energy consumers: the beginning of evolution
   1.3 Energy consumers: today
      1.3.1. New tariffs, products and services
      1.3.2. New recruitment and service channels
      1.3.3. Newcomers
      1.3.4. Open innovation and start-up in the world of energy supply firms
   1.4 The future of energy consumers

2. Study
   2.1 Consumer trends
      2.1.1 Introduction to utility trends
      2.1.2 Trend conceptualisation and evidence
   2.2 Results of the study: traditional companies
   2.3 Results of the study: emerging companies
   2.4 Final conclusions
1. CONSUMER PROFILE EVOLUTION
Electric companies are making numerous efforts to adapt to this new reality. New players that are gaining their own space and identity and providing the system with capacity for innovation and agility have also emerged.
1.3.1
NEW TARIFFS, PRODUCTS AND SERVICES
Energy consumers demand more personalised services. Is there a reference where this fact can be found? Refuse to contract new products or complementary services that are not accompanied by good service. Websites or mobile applications that enable management, access to the best offers based on energy consumption and customisable electronic bills are some examples. However, one of the services most in demand is being able to have information about the electricity tariff in real time in order to achieve greater consumption efficiency.

Today's energy consumers demand a perfect experience. The tendency to change energy supplier if the demanded experience is not obtained is increasingly higher.

Saver consumers

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Try to reduce their consumption as much as possible</td>
<td>83.6%</td>
</tr>
<tr>
<td>Use efficient appliances</td>
<td>76.6%</td>
</tr>
<tr>
<td>Use LED bulbs at home</td>
<td>73.3%</td>
</tr>
<tr>
<td>Have good insulation in their homes</td>
<td>65.3%</td>
</tr>
<tr>
<td>Have reduced the contracted power</td>
<td>31.1%</td>
</tr>
<tr>
<td>Have changed to another tariff that is more economical</td>
<td>40.6%</td>
</tr>
<tr>
<td>Concentrate their consumption in the off-peak hours</td>
<td>38%</td>
</tr>
<tr>
<td>Have changed supplier company</td>
<td>31.8%</td>
</tr>
</tbody>
</table>

Source: IV Online Comparison Study towards Smart Savings. 2017 Rastreator

Digital consumers are more informed and do the work of reviewing their contract to adapt it to their profile. Hence, more than 40.6% have contracted another tariff, 31.8% have changed company and 31.1% have reduced the power contracted after reviewing the terms of their contract.
New tariffs

**TARIFFS BASED ON THE CUSTOMER’S AGE**
- **Tariff for over 65 years** Endesa

**CHARTITY TARIFFS**
- ScottishPower tariffs through which cancer research is supported.

**TARIFAS BASADAS EN LA ESTACIONALIDAD**
- Iberdrola summer plan
- Iberdrola winter plan

**TARIFFS ORIENTED TO CUSTOMERS’ HOBBIES**
- Energie Direct, PSV tariff, which gifts PSV t-shirt to customers who contract this tariff.

**FLAT TARIFF PLANS**
- **Endesa** One Energy tariff
- **Viesgo** 100% online electricity tariff

**DIGITAL TARIFFS**
- **Endesa** Tempo happy

**TARIFAS QUE REGALAN HORAS DE ENERGÍA**
- The customer does not pay at certain times
  - **Endesa** Tempo happy
  - **British Gas** Home Energy Free Time tariffs

**TARIFFS BASED ON THE CUSTOMER’S PLACE OF RESIDENCE**
- **Endesa** City Luce tariff

**TARIFFS BASED ON THE ENERGY SOURCE**
- Eco tariffs, 100% renewable from **Gas Natural**
1.3.1 New tariffs, products and services

**New products/services**

**ScottishPower** offers energy packages that can be “recharged” from the App.

**PowerUp** enables ScottishPower customers to obtain days of energy with one of the most competitive tariffs available in the UK market.

**Payment protection insurance.**

Companies such as Viesgo and Pepeenergy offer this product to their customers. Viesgo payment protection assistant guarantees bill payment in the event of any problem that may arise: unemployment, hospitalisation, temporary, absolute or permanent disability, death, etc.

**Payment Protection Assistant and 24-hour Assistant from Viesgo.**

In Viesgo ya se incluye el asistente protección de pagos de manera gratuita. “Goodbye Surprises” energy tariff, the payment protection assistant is included for free.

**Duke Energy**

It offers a variety of complementary and optional products and services to customers:

- **StrikeStop**, is a lightning rod that is installed inside the meter. It protects electrical appliances and devices if they are damaged by a power surge.
- **Underground Protection** provides maintenance services for underground electrical panels.

**Eprimo moving service**

The German company offers a complete moving service to customers who are moving home.

**NLE**

NLE offers its customers energy and telecommunications services.

Some international utilities incentivise customers with loyalty bonuses.

They offer loyalty bonuses to customers who contract tariffs with permanence of more than one year.

Companies such as Wie Einfach and Vattenfall offer these loyalty bonuses.
THE RISE OF ENERGY TARIFF COMPARISION SITES - WHY ARE THEY APPEARING?

As seen above, consumers are increasingly informed about the services they contract and have a more critical attitude. Online energy tariff Comparison Sites have played a very important role in user training, which could explain the popularity increase of this tool in recent years.

This popularity is reflected in the number of users who use online Comparison Sites, 22% higher than last year. There was also a 17% increase in regular users of this type of platform. (Source Rastreator). This data reflects their consolidation, greater popularity and higher number of users.

The energy sector is a complex market, where users observe a complicated scenario that they seldom understand, with numerous legislative changes and tariff fixing. Online energy tariff Comparison Sites are consolidated as references when it comes to providing confidence to users as they offer clarity and transparency, with comparisons of the different offers in the market identifying the energy supplier that best suits the profile of different consumers.

All in all, the role of these platforms is decisive in providing users with all the information they need to make a final decision about tariffs and contracts, responding to their needs and aligned with the new consumers’ critical attitude toward suppliers.

These platforms have a privileged position since they offer users all the information they demand, with total market transparency, thus facilitating final decision making.
1.3.1 New tariffs, products and services

**What are the most relevant energy Comparison Sites in Spain**

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>Independent website for comparing electricity and gas tariffs.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Selectra</th>
<th>Eligetuenergia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Founded in 2007 in Paris Selectra was launched in Spain in 2013.</td>
<td>Company supported by an entity which is financed and backed up by a group of investors.</td>
</tr>
</tbody>
</table>

In other European countries, energy tariff Comparison Sites are more developed than in Spain.

**Uswitch**

It is one of the best-known Comparison Sites in the United Kingdom. It is presented as a “free, fair and impartial” comparator and is accredited by Ofgem.

**UK Power**

Comparator widely recognised in the United Kingdom. Accredited by Ofgem, it compares the entire market completely impartially and for free. Its website presents more than 600 reviews by users who have used the comparator portal to compare energy tariffs.
1.3.2
NEW CHANNELS
(CONTRACTING AND CUSTOMER SERVICE)
WHY DO NEW CHANNELS EMERGE?

In a sector as complex as the Spanish electricity market, in which it is a challenge for the majority of users to understand the different aspects of energy bills (energy prices, tariffs, social subsidies, final figures that appear on the bill, etc.), it is logical that it is the source of the largest number of queries and complaints received throughout the year (according to the ranking prepared by FACUA-Consumidores en Acción). According to this ranking, in 2014, gas and electricity companies occupied the third position, only behind the telecommunications operators and banking companies, in the number of claims.

That is why companies in the sector have a wide range of customer service channels, in addition to commercial offices. Some examples are landline phones, corporate Websites and conventional and electronic mail, among others.

In recent years, companies have been incorporating new and more disruptive customer contact channels, adapting themselves to the platforms which are commonly used by users such as social networks (whose use is increasingly widespread for customer service) and instant messaging thanks to applications such as WhatsApp and Telegram.

Companies in the sector also have a wide margin of improvement by providing 24-hour service. They currently have a specific service schedule on social networks and instant messaging, and receive greater trust from their customers.

More than half of consumers search for information online, asking questions through social networks and forums. This entails the so-called digital empathy; in other words, the weight of the valuations of the environment and shared experiences, more accessible thanks to the digital platforms and new technologies.

### Summary table of channels used by Spanish utilities

<table>
<thead>
<tr>
<th>Company</th>
<th>WEBSITE</th>
<th>APP</th>
<th>SOCIAL MEDIA</th>
<th>EMAIL</th>
<th>TELEPHONE</th>
<th>WHATSAPP</th>
<th>TELEGRAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>ENDESA</td>
<td>✗</td>
<td>✖️</td>
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<td>IBERDROLA</td>
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<td>GAS NATURAL</td>
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<tr>
<td>FENOSA</td>
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<tr>
<td>VIESGO</td>
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<td>HOLALUZ</td>
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<tr>
<td>LUCERA</td>
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<tr>
<td>PEPEENERGY</td>
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<tr>
<td>EDP</td>
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<td>✗️</td>
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<tr>
<td>FENÍE ENERGÍA</td>
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<td>✗️</td>
<td>✗️</td>
<td>✗️</td>
<td></td>
</tr>
</tbody>
</table>

*NOTE: Endesa: chat only for customers; GNF: contact form only for large customers; Viesgo: chat appears in FAQs but is not displayed on the website.*
ENERGY CONSUMER TRENDS

1.3.2 New recruitment and service channels

**TYPES OF CONTACT CHANNELS: CLASSIC VS DISRUPTIVE**

**WEBSITE**

Energy companies’ websites have different alternatives for contacting the company. Virtually all of them have either a contact form or a chat application, through which users can instantly talk to an agent.

**FACEBOOK AND TWITTER**

These have become the main social networks for customer service and are the most used. Both have a high percentage of use although the combined option of both networks achieves much greater acceptance among companies.

**TELEPHONE**

All companies have a fixed customer service number. These numbers tend to be free so that there is no cost to the customer to contact the company. As happens with email addresses, some companies have different phone numbers depending on the query to be made.

**EMAIL**

All companies have an email address so that the customer can contact the company. Many even have different email addresses depending on the query (for customers, for non-customers, for contracting, breakdowns, queries, etc.).
1.3.2 New contracting and service channels

The disruptive channels:

**APP**

It is noteworthy that not all companies have a mobile application through which the customer can carry out their daily tasks (check their bills, contact customer service, etc.).

**OTRAS RRSS**

Through other social networks such as YouTube, Customer service is provided through video-responses which have been recorded by the company’s staff (e.g. Holaluz) where they provide answers to the customer’s FAQs.

**INSTANT MESSAGING (WHATSAPP AND TELEGRAM)**

Some companies have decided to adapt to the platforms most used by customers and potential customers to provide customer service. The benefits of providing customer service this way are immediacy, convenience and ease for the customer when communicating and providing information in text in a tool that the customer always has available.

**CHAT**

The chat apps that appear on the websites of some companies also provide immediate assistance to users who have questions or queries that have to be resolved simply, quickly and in a personalised way.

**OTHERS**

Iberdrola’s ComunicA video interpretation service. This service was created with the aim of answering questions and offering personalised advice to users with hearing disabilities. “Through this service, users can call a Preferential Service Line using the SVisual telephone platform, which allows communication with a video-interpreter (with sign language) and via chat”.

1.3.3 NEWCOMERS
The evolution of consumers and the evolution of their expectations has been constant and has opened a race on how to satisfy them. A new type of company has joined the race with a different vision to traditional companies; these companies ride between the energy and the technology sectors and position themselves as disruptive companies, changing the evolution of the historical customer/company relationship.

Despite the opening of the market, it is still controlled by five major energy groups (Endesa, Iberdrola, Gas Natural Fenosa, EDP and Viesgo), which account for 95% of the domestic market, and 80% and 70% of the SME market and the industrial market, respectively.

The new energy supply firms firmly believe that the electricity sector as it is currently known “has an expiry date”. They emerge through the internet and aim to change the current model of a sector in which there are a large number of consumers who do not have their expectations met, as in other sectors.

The majority of these customers come from the largest companies: “98% of market share in the domestic segment is in the large electric companies; it is such a big market that it is difficult to find someone,” explains Carlota Pi, co-founder of Holaluz.

The new agents have a firm conviction to change the electricity sector model despite not being part of this sector alone. The new electricity companies are also part of two other markets: technology and Smart Homes (smart devices in the home that help control consumption and establish savings guidelines, among others).
NEW BUSINESS MODELS

New players have emerged bringing new business models with them, such as non-profit green energy consumption cooperatives, which produce and market energy from 100% renewable sources.

Other disruptive models consisting of a network of energy consultants have also appeared with the objective of providing a personal service with a high presence throughout Spain.

100% GREEN ENERGY

One of its most important features is to market only renewable energy (solar, hydraulic, wind, biomass and biogas), certifying it through the CNMC. It also strongly supports self-consumption, through photovoltaic panels or electric mills, among others, and believes that any consumer can generate their own energy.

100% DIGITAL COMPANIES

The differential value of these native digital utilities is that they are very technological companies and it is common to find companies that use cloud-based learning, big data solutions and advanced analysis platforms to help accurately predict future consumption patterns and offer consumers fully customised tariffs or tariffs that are more adapted to their consumption requirements.

Also, customers entirely manage their accounts over the internet, where they can clearly see their consumption in detail and have control of it, establish notifications for when maximum consumption is reached, etc.

TRANSPARENCY WITH THE CUSTOMER

Energy consumers’ general dissatisfaction with their supplier lies, among other things, in the distrust of the companies in the sector perceived by the customer.

To change this perception, the new energy supply firms opt for transparency, sincerity and charity. Good examples of this are the conciliatory attitudes among the new energy supply firms, transparency in the information offered (even when it may go against commercial interests) and the appearance of charity contributions.
1.3.4 OPEN INNOVATION AND THE START-UPS IN THE WORLD OF ENERGY MARKETING FIRMS
The arrival of new technologies and digital transformation change the pace of traditional electricity companies. The speed of external changes and traditional internal processes in these companies mean that new ways of working to develop products and services that take full advantage of these new technological capabilities need to be found.

The digital opportunity has two aspects; it enables traditional energy products to be improved and new products or business models are made feasible thanks to these new digital technologies. New services such as energy efficiency based on data analysis, intelligent connected devices such as thermostats and smart load managers, self-consumption solutions and energy storage or recharging electric vehicles inside and outside of the consumer’s facilities.

Technologies that open the doors to utilising the immense amount of data that comes from smart meters, combining it with information about connected equipment thanks to the Internet of Things, direct and multichannel access for consumers using design technologies and experiences that facilitate the use of all that information or exponential technologies such as the Blockchain that enable massive transaction management between individuals without impacting the complexity of subsequent liquidations.

In many cases, the way to approach these new technologies involves opening their work teams and internal processes to third parties. The high-level digital innovation service provider profile does not always correspond to that of traditional providers and this is why energy companies are launching open innovation initiatives where they collaborate with technology companies and research centres with a component of greater risk, often limiting proprietary developments that have traditionally been part of their way of working. This is the new way of integrating specific talent into organisations where this talent could not fit in any other way.

In other markets, the link to start-ups started in the same way, based on specific collaborations, although it has evolved to the point of making significant start-up acquisitions from different maturity stages to then fully integrate them and use them to transform their companies internally or to keep them in parallel and continue to take advantage of the flexibility and agility of a company of these characteristics.
1.4 FUTURE ENERGY CONSUMERS

It is expected that future energy consumers will follow the path of current demand and, increasingly, claim that their experiences in other more advanced sectors are possible in the energy sector.

In addition, deepening in their spirit of curiosity, the search for energy efficiency, electric vehicles, collaborative consumption, connected homes and Smart Cities, among others, are consolidated as major elements to leverage for increasing and capturing their interest. In turn, energy companies need to place the focus on analysing current consumer trends in order to understand their application within the energy sector and whether they fit with their philosophy and strategic roadmap.

All the companies affirmed that adapting to this new customer and satisfactorily fulfilling their needs and demands is a priority issue in their business model. To achieve this, it is important to properly manage customer service channels and analyse and manage the information that customers provide, beyond their consumption.

Traditional companies, as well as the new players that appear in the market that have a greater capacity for adaptation, that offer higher quality in terms of customer experience, whether millennial or not, and can respond to this digital challenge quickly will be able to lead a market that is becoming increasingly competitive and demanding.
2. STUDY
2.1 CONSUMER TRENDS

Based on studies produced by different international observatories on consumer trends and global changes in consumption patterns, everis has developed and adapted a framework of trends to the sector that directly applies to the energy sector in Spain.

It should be noted that this has been a complete exercise of understanding and adaptation to the sector itself, leading to some new trends and discarding others. Finally, 12 is the number of resulting trends, divided into 3 blocks according to their nature or theme.

2.1.1 INTRODUCTION TO UTILITY TRENDS

In Spain it is observed that although these consumer trends are not yet so widespread, there are indications that prove that there are opportunities for companies that know how to get ahead and position themselves as a benchmark in each of them.

The following trends are presented:

- **BLOCK 1: Consumer behaviour**
  - **Better Business**: good business is good business.
  - **Club Generation**: a value proposition that unites and provides status.
  - **Betterment**: individual enjoyment, general improvement.
  - **Local Love**: places with local charm.

- **BLOCK 2: Moment of purchase**
  - **Information Universe**: the customer is the centre of all decisions.
  - **Post-Demographic**: new fashions, new attributes.
  - **Pricing Pandemonium**: different tariff, same experience.
  - **Playsumers**: surprise, entertainment and excitement.
  - **Helpful**: cmulti-utility concept.

- **BLOCK 3: Macro Environment Of The Sector**
  - **Ubitech**: the omnipresence of technology.
  - **Fuzzynomics**: who’s who?
  - **Talent Companies**: attract young talent to a dynamic organisation.
2.1.2 CONCEPTUALISATION AND EVIDENCE OF TRENDS

For a trend to be recognised, there must be evidence or incipient behaviours that guarantee these guidelines.

Below is an analysis of evidence for each trend where different data and projects of energy companies and outside the sector are shown as examples, which guarantee the presence of these trends.

*Good business is good business*

**BETTER BUSINESS**

**VISION OF THE CUSTOMER**

Customers value attributes beyond the product or service and adapt their purchase decision and their expectations.

**WHAT DOES IT INVOLVE?**

A symptom of a mature consumer society; seeking long-term solutions without generating negative impacts on society. Positive externalities are sought, consumed in places and companies that will do something useful for society with the profits that are generated by them.

**WHAT EVIDENCE IS THERE?**

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>SECTOR</th>
<th>ORIGIN</th>
<th>CUSTOMERS</th>
<th>ECONOMIC DATA</th>
</tr>
</thead>
</table>
| Spain   | Utilities| 2010   | Contracts: +55,000  
Partners: +36,000 | Revenue (2016):  
17,4 M |

What is it?
A non-profit green energy consumption cooperative.

What does it offer?

— Commitment to promote a change in the current energy model to obtain a 100% renewable model.

— This is part of the charity economy movement.

— It has no profit motive, its salaries are sustainable and fair, it makes a minimum expenditure on communication in payment methods and makes a clear commitment to social networks and word-of-mouth promotion.
2.1.2 Conceptualisation and evidence of trends

### AUARA

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>SECTOR</th>
<th>ORIGIN</th>
<th>CUSTOMERS</th>
<th>ECONOMIC DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>Power</td>
<td>2014</td>
<td>2.000.000</td>
<td>Initial investment (2015): € 25,000 Social Security Investment (2017): 212.000€</td>
</tr>
</tbody>
</table>

What is it?
A brand of mineral water that invests 100% of its dividends into bringing drinking water to people who do not have it.

What does it offer?
- Initiatives to ensure water supply.
  - This is part of the charity economy movement.
- Its water bottles are made from 100% recycled plastic.
  - R-Pet. Which contributes to reducing environmental impact.

- Customers know that they are not only consuming a service or product, they are also helping with social improvements.

A value proposition that unites and provides status

---

### CLUB GENERATION

#### VISION OF THE CUSTOMER
El cliente aspira a proyectar una imagen y pertenecer a un grupo que se identifica con los valores que proyecta una marca, producto o servicio.

#### WHAT DOES IT INVOLVE?
In a consumer society, people build their social status through products, services and experiences. Luxury and accumulation are just two sources of status. Today, people seek to be generous, consume green and consume ethically. In addition to looking for an image to feel comfortable with, people seek to connect with those who share their tastes and concerns. This results in innovative companies designing “smart” loyalty programmes that promote self-realisation, recognition and the sense of belonging and status.
2.1.2 Conceptualisation and evidence of trends

¿Qué evidencias existen?

Holaluz

<table>
<thead>
<tr>
<th>Country</th>
<th>Sector</th>
<th>Origin</th>
<th>Customers</th>
<th>Economic Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Spain</td>
<td>Utilities</td>
<td>2010</td>
<td>100,000</td>
<td>Revenue (2016): €100 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>310 sign-ups/day on</td>
<td></td>
</tr>
</tbody>
</table>

What is it?

An electricity company where the best advertising is from customers making recommendations to friends, which reflects their pride in belonging to this company.

What does it offer?

- Through “La Luz Amiga”, customers send out invitations to other users, with which the customer and the new user receive 20 euros as a gift.
- Holaluz presents its different teams through posts on its blog. These posts cover various topics related to bills, energy efficiency, etc.
- It is common to see its CEO in everyday scenes through which he explains the situation and news of the company and the tools that are available to customers.

Toyota

<table>
<thead>
<tr>
<th>Country</th>
<th>Sector</th>
<th>Origin</th>
<th>Customers</th>
<th>Economic Data</th>
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<tbody>
<tr>
<td>Spain</td>
<td>Automotive</td>
<td>1997 (Japan)</td>
<td>58,000 units</td>
<td>Global Toyota net profit 2016: $14,763 M</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2000 (worldwide)</td>
<td>25,000 units hybrid 2016</td>
<td></td>
</tr>
</tbody>
</table>

What is it?

The Toyota Prius is a petrol/electric hybrid car that has become representative of environmentally friendly vehicles.

What does it offer?

- The Prius was launched in the Japanese market in 1997 and was the first hybrid vehicle produced in series. In 2000 it was launched in other markets worldwide.
- Today, the Toyota Prius is sold in more than 70 countries and with more than one million units sold has positioned itself as an environmentally friendly icon. Named the most popular hybrid of 2015.

Customers feel like they are more than a customer, they feel that they are part of a life philosophy.
2.1.2 Conceptualisation and evidence of trends

**Individual enjoyment, general improvement**

**BETTERMENT**

**VISION OF THE CUSTOMER**
Customers feel that they are improving physically, spiritually and socially.

**WHAT DOES IT INVOLVE?**
The search for betterment can manifest in many ways; better health, greater knowledge, acquisition of skills, etc. When consuming a new product or service, customers seek to ensure that the experience offered leads to an improvement in their lives.

**WHAT EVIDENCE IS THERE?**

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>SECTOR</th>
<th>ORIGIN</th>
<th>CUSTOMERS</th>
<th>ECONOMIC DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>EEUU</td>
<td>Energía</td>
<td>Gyre9 (2006) Foundation</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

What is it?
The Green Revolution is a sports club established in the USA that bases its value proposition on a connection between health, energy and the environment. This initiative has been developed by Gyre9, an American design and product development firm with experience in industries such as industry and medicine.

What does it offer?
- A system that converts the human effort generated during aerobic activity into clean and renewable energy, which is then usable.
- Gyre9 offers solutions oriented solely towards improving the environment and promoting health through physical fitness.
Places with local charm

LOCAL LOVE

VISION OF THE CUSTOMER

Valuation of “Local” is perceived as positive and necessary to have unique experiences and enjoy them beyond the physical.

WHAT DOES IT INVOLVE?

Despite globalisation and the virtual nature of the world, the local character of places is still important. Consumers prefer knowledge, services and local products that add value and authenticity to the experience. The local world offers that touch of differentiation that globalised services and products cannot offer.
What is it?
LoCo2 is a British energy company that offers information about its different plants with special emphasis on local energy.

What does it offer?
- Detailed information about the origin of the energy.
- They have plants located in the Scottish highlands where the natural power of rain and water is used.

What is it?
McDonald’s seeks differentiation elements in a globalised market.

What does it offer?
- McDonald’s Spain makes all its hamburgers with 100% Spanish beef.
- Spanish chefs Dani García and Ramón Freixa, who together have four Michelin stars, design their own version of the ‘Grand McExtreme’ burger, for which Extremadura beef and Iberian cheese are used, among other ingredients.
- McDonald’s also informs about the origin of its ingredients on its website.

Customers know that in addition to consuming a service or product, they are also helping with social improvements.
The customer is the centre of all decisions.

**INFORMATION UNIVERSE**

**VISION OF THE CUSTOMER**

The customer is the centre of all decisions, provides information and expects companies to make relevant and personal value propositions.

**WHAT DOES IT INVOLVE?**

The desire to intelligently manage and administer useful and relevant information is growing. It is a bidirectional information flow. Companies’ actions become more transparent and they in turn obtain information from users to personalise the experience, providing greater added value.

**WHAT EVIDENCE IS THERE?**

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<thead>
<tr>
<th>COUNTRY</th>
<th>SECTOR</th>
<th>ORIGIN</th>
<th>CUSTOMERS</th>
<th>ECONOMIC DATA</th>
</tr>
</thead>
<tbody>
<tr>
<td>Origin: Canada</td>
<td>Utilities</td>
<td>2012</td>
<td>100 Million</td>
<td>Non-profit corporation</td>
</tr>
</tbody>
</table>

What is it?

Green Button provides customers with easy and secure access to their energy consumption information.

What does it offer?

This initiative was created in 2012 to provide utility customers with easy and secure access to their energy usage information (electricity, natural gas and water) in a friendly format:

- It enables residential customers to access their usage data and modify consumption at high peaks.
- It enables commercial and institutional customers to manage energy consumption in multiple facilities and campuses. It avoids having to collect data manually.
- It enables new programmes and services to be offered that are designed from the available information, measuring results.
What is it?
Fintonic is an app that enables users to manage the expenses of all accounts in one place.

What does it offer?

- It enables users to identify where the money is going and at what pace, with personalized advice.
- It also alerts if something significant happens with the user’s money, such as duplicate charges, overdrafts or commissions.
- It also enables them to consult their personal accounts - as well as shared accounts - together or separately.

Consumers receive tips for real-time use with the aim of improving different aspects of their everyday lives.

New trends, new attributes

POST-DEMOGRAPHIC

VISION OF THE CUSTOMER

Traditional segmentation variables have changed and segmentation by consumption habits breaks socio-demographic structures.

WHAT DOES IT INVOLVE?

Consumption patterns are no longer applied based on criteria such as age, gender, revenue level, etc. People of all ages in all markets feel more liberated to break old conventions and build their own lifestyles and identities. There are new convergences of preferences, aspirations and expectations.
### What Evidence Is There?

<table>
<thead>
<tr>
<th><strong>Country</strong></th>
<th><strong>Sector</strong></th>
<th><strong>Origin</strong></th>
<th><strong>Customers</strong></th>
<th><strong>Economic Data</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>España</td>
<td>Utilities</td>
<td>2016</td>
<td>1000</td>
<td>Revenue (2016): 12,1 M £</td>
</tr>
</tbody>
</table>

**What is it?**

Podo is the only company that enables users to divide the electricity bill.

**What does it offer?**

- Podo offers a shared billing service for rental apartments: dividing the bill so that it is charged directly to different tenants.
- For self-employed people, Podo enables part of the bill to be deducted and sends it directly to the manager (freelancers).

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<tr>
<th><strong>Country</strong></th>
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<th><strong>Origin</strong></th>
<th><strong>Customers</strong></th>
<th><strong>Economic Data</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>España</td>
<td>Retail</td>
<td>1975 - Foundation 2016 -launch Campaign</td>
<td>+ 8 million/year Spain</td>
<td>Revenue (2015): 13,268 M €</td>
</tr>
</tbody>
</table>

**What is it?**

A new genderless line of clothes launched by Zara.

**What does it offer?**

- Zara has taken over the “genderless” concept by launching Zara Ungerdered, a new genderless line.
- It is a collection of 16 simple garments with neutral colours and with no differences in sizes or patterns for one gender or the other.

---

*The tastes or habits of consumers’ lives are the authentic enhancers of their consumption.*
Different tariff, same experience

PRICING PANDEMONIUM

VISION OF THE CUSTOMER

Setting different tariffs for the same service depending on who the consumers are and the point of the consumption cycle they are in.

WHAT DOES IT INVOLVE?

Responding to this trend, new segments are obtained based on tariff flexibility.

WHAT EVIDENCE IS THERE?

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</thead>
<tbody>
<tr>
<td>Origen: EEUU Internacional</td>
<td>Retail</td>
<td>1969 - Foundation</td>
<td>100,000</td>
<td>Revenue (2017): 15,520,0 M$</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>310 sign-ups/day on average</td>
<td></td>
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</table>

What is it?

GAP defined an innovative and disruptive way to personalise the prices to each customer.

What does it offer?

— Customers can define the price for a particular product through the gapmyprice.com site.

— The process is as follows: users propose a price for a product from among the options that GAP establishes. GAP proposes an offer and the customer can accept the offer or make a counter offer, with GAP having the last word.
Radiohead is a British alternative rock band that decided to launch its seventh album “In Rainbows”, where customers are free to pay the amount they decide to pay.

What does it offer?

— It offers the possibility of acquiring the album with the economic contribution that the customer considers.
— It turned out that most customers paid the list price and many reserved the “discbox edition”.

The product price is defined by the customer, either directly or indirectly.

Surprise, entertainment and excitement

PLAYSUMMERS

VISION OF THE CUSTOMER

Application of the concepts and techniques of games as of capturing customers’ attention, motivating them and making them share in the experience.

WHAT DOES IT INVOLVE?

A novel way to fascinate consumers, usually with reward models and challenges. Products, services and entertaining or unexpected campaigns that make life more pleasant enable brands to capture consumers’ attention.
### Changers

**Country**: Alemania  
**Sector**: Financial  
**Origin**: 2012  
**Customers**: +10,000 download  
**Economic Data**: Investments (2016): 1.5 M$  
M Revenue (2016): 4.4 M$

**What is it?**

Changers is a German company that helps companies improve their health through “gamified” sustainability initiatives.

**What does it offer?**

- The company has developed a new app, CO2Fit, which enables users to track the carbon emissions they have generated on their trips based on the type of transport used.
- It is a “gamified” app with which users can compete against others for prizes.
- For each kilo of CO2 saved, users earn a Recoin, a unit of the company’s virtual currency, which can be used to buy weather certificates through the app.

### Intelen

**Country**: EE.UU.  
**Sector**: Technology and service  
**Origin**: 2011  
**Economic Data**: Investments (2016): 1.5 M$  
M Revenue (2016): 4.4 M$

**What is it?**

It encourages customers to adopt efficient actions and behaviours by applying gamification techniques.

**What does it offer?**

- The DiG Engagement module enables companies to keep their users loyal by applying gamification techniques. This encourages customers to adopt actions and behaviours that they could not adopt through their own devices.
- Motivation is encouraged through competition among users, fostering the sense of achievement and status that every consumer seeks.
- Intelen combines gamification with cross-selling opportunities that help electricity businesses to attract new customers.

*The motivation generated by the company provides a greater customer engagement experience.*
Consumers look for brands that are part of the solution, not the problem. They seek convenience, aiming to become a global partner or provider of consumer services.

Customers’ needs are met 24 hours a day, 7 days a week (24x7). So the customer receives: convenience, immediate satisfaction, emergency coverage. For the company, this means positioning (top-of-mind). It also brings the product closer to the customer, saving costs: personnel, landlines, office space and presenting the brand to non-customers.

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</tr>
</thead>
<tbody>
<tr>
<td>Reino Unido</td>
<td>Utilities</td>
<td>1986</td>
<td>11 million</td>
<td>Pre-tax profit (first half 2017): £81 M</td>
</tr>
</tbody>
</table>

What is it?
British Gas partners with Axa Seguros to expand its service offering.

What does it offer?
A portfolio of products including home insurance.

Why choose Home Insurance from British Gas?
- You can keep your quote for 60 days, even after the offer ends.
- You’ll have an online account to simply manage your policy.
- Our help teams are UK based and we have a 24-hour claims notification line.
- We've partnered with Axa to help protect your home from the unexpected.

> Get a quote
Already a Home Insurance customer? Log in to your account.
Southern Electric is an established UK energy company that offers a greater variety of services in addition to the usual utility services (electricity, gas and maintenance). It includes the possibility of contracting a telephone line and broadband.

- What could be a problem before, becomes a single solution for the customer.

The omnipresence of technology

**UBITECH**

**VISION OF THE CUSTOMER**
The customer is related at all times and through different channels with brands and their products, even if they are not customers.

**WHAT DOES IT INVOLVE?**
Technology – connecting people, consumers, organisation and objects – is modelling key aspects of society. With consumers increasingly submerged in the technological world, talking about off and online worlds is becoming irrelevant. Ultra connected experience through the use of technology throughout the “customer journey”.

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<tr>
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</tr>
</thead>
</table>
What is it?
Eneco is a Dutch utility that offers Toon, a device that shows exactly how much energy is used.

What does it offer?
- Daily, weekly or monthly consumption data is obtained.
- It also enables synchronisation with other smart devices in the house and compares consumption with that of the neighbour.
- Around 15% of Eneco’s customers own a Toon and they are saving an average of 5% in energy.
- Eneco plans to enter the rental market. It is negotiating with housing corporations that want to make their properties sustainable.

What is it?
Home app (from Apple) enables users to control the smart accessories of their home from their iOS devices with one touch, automatically or with Siri.

What does it offer?
- It enables different environments to be created with combinations of accessories that work at the same time with a single order.
- Users can ask by voice to turn a device on or off, or choose one of the different environments, since Siri knows what kind of products for HomeKit users have at home and how they are working.
- If users have an Apple TV, they do not need to be at home to control it.

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Remote control at all times and for any situation in real time.
Who’s who?

**FUZZYNOMICS**

**VISION OF THE CUSTOMER**

Merging the roles of customer and supplier is altering the linearity of transactions.

**WHAT DOES IT INVOLVE?**

Consumers become part of the production process, becoming “prosumers” (producer consumers). The line between producer or service provider and consumer becomes diffuse. The paradigms are changing; collaborative consumption and the open business models are already here.

**WHAT EVIDENCE IS THERE?**

![MOSAIC](image)

<table>
<thead>
<tr>
<th>COUNTRY</th>
<th>SECTOR</th>
<th>ORIGIN</th>
<th>CUSTOMERS</th>
<th>ECONOMIC DATA</th>
</tr>
</thead>
</table>

What is it?

Platform for offering loans to homeowners to install solar panels.

What does it offer?

- A system that connects investors who believe in clean energy with homeowners.
- The owners receive loans that enable them to save money, while contributing to improving the environment.
Updating organisational structures and key roles of companies to attract young talent and respond to the market.

Hiring young talent into the corporate world entails the search for innovation and digital development. This is accompanied by updating traditional structures to achieve flexible and dynamic organisations that offer greater ease when it comes to adapting to the constant changes that are taking place.

**EVmatch**

**What is it?**

EVmatch is a peer-to-peer charging network for electric vehicles.

**What does it offer?**

- Its business model can be compared to the Airbnb model.
- It consists of an app where users can search for a charging station with a reservation option and online payment, so that availability is guaranteed.

- Consumers feel supported when producing and consuming energy.  
  It is not considered intrusive in the sector.

**TALENT COMPANIES**

**VISION OF THE CUSTOMER**

Updating organisational structures and key roles of companies to attract young talent and respond to the market.

**WHAT DOES IT INVOLVE?**

Hiring young talent into the corporate world entails the search for innovation and digital development. This is accompanied by updating traditional structures to achieve flexible and dynamic organisations that offer greater ease when it comes to adapting to the constant changes that are taking place.
What is it?
Siemens collaborates directly with the New York start-up, Lo3 Energy, for assembling self-supply microgrids and local consumption in Brooklyn.

What does it offer?
- This solution enables local energy to be marketed based on blockchain between producers and consumers.
- Siemens and Lo3 Energy intend to implement additional projects to test other business models and obtain information about the response of the solutions in other regions of the world.

What is it?
The young executive director of Burger King, aged 33, is who completely remodeled the company.

What does it offer?
- Daniel Schwartz managed a total restructuring of the hamburger chain after 13 months in office at just 33 years old.
- After being surrounded by an equally young management team (including a 28-year CFO) he managed to increase the company’s sales by 2% in the first quarter of 2014, and net profit almost to 60.4 million dollars.
2.2
RESULTS OF THE STUDY
In order to carry out this study, everis has undertaken interviews and work sessions were carried out with executives of the main companies in the electricity sector with current and future visions of the practices with impact on their customers.

In these sessions, each trend was qualitatively analysed individually, and subsequently prioritised according to their importance within the company when it comes to visualising it or addressing it in the short term.

The prioritisation of trends by the companies participating in this study has been heterogeneous, so that if all the answers obtained are consolidated, a clear pattern cannot be identified to identify which are the priority trends in the sector.

However, if the results obtained in two groups are disaggregated, considering traditional companies on the one hand and New comers or emerging companies on the other, significant differences can be appreciated that provide a better vision of the sector.

**Traditional companies:** EDP Spain, Endesa, Gas Natural Fenosa and Viesgo

**Emerging companies:** Fenie Energía, Holaluz, Lucera and Podo

**Once the trends have been quantified, they can be classified into four groups:**

1. **Short-term trends:** this quadrant includes the trends that companies consider they must address in the short term or that are already in progress, because there has been a high consensus in a positive way in giving them high priority.

2. **Differentiating trends:** trends that the vast majority does not consider within their strategic roadmap, and only one of the companies considers them a priority in the short term.

3. **Long-term trends identified:** trends that do not require such immediacy in addressing because companies are in consensus that it is not important to take them into account in the short term, but rather later in time. Most of the participants have prioritised and consider them important, but at a second prioritisation level.

4. **Non-prioritised trends:** those for which there is a general agreement that they are not priority, having low positions or even not being taken into account in the prioritisation.
There are clear peaks in the trends considered the highest most priority. These trends are “Information Universe”, “Better Business” and “Ubitech”.

On the other hand, there are also trends that appear with low priority and even discarded in a generalised manner, such as Playsummers, Pricing Pandemonium and Local Love.

**If the trends are grouped as explained above, the result would be:**

- **SHORT TERM**
  1. Information universe
  2. Better Business
  3. Ubitech

- **DIFFERENTIATORS**
  1. Talent Companies

- **IDENTIFIED LONG-TERM**
  1. Betterment
  2. Fuzzynomics
  3. Helpful
  4. Post-demographic

- **NOT PRIORISED**
  1. Club Generation
  2. Local Love
  3. Playsummers
  4. Pricing pandemonium
It appears as the highest priority trend. The idea behind this trend is that consumers are willing to share personal information about their habits and lifestyle as long as they receive a benefit in return. This trend is also driven by other sectors that are already more advanced in this aspect and where companies seem to know their customers well. Thus, there are very clear examples that show the existence of this reality in other sectors, such as that a person can receive proactive alerts on the mobile phone indicating the time they have to leave and the route they should take depending on traffic to arrive on time for an appointment, simply taking the information registered and shared on their mobile phone (address book and current location).

The benefit obtained by consumers must be tangible and is usually closely related to product and service personalisation that demonstrates that the company really knows them. In the energy sector, there is certain distrust of companies for customers to fully share their data, so work is required beforehand for companies in the sector to gain their confidence. In this sense, products and services are already appearing that seek greater personalisation for consumers with the aim of improving the relationship of trust and ensuring that customers perceive a real benefit in sharing their information. Create tariffs adapted to their needs, facilitate comprehension of their bill, disaggregate consumption by household appliance and show the consumption of their appliances in real time are ideas or actions that are being carried out to eliminate that barrier that customers have with the electricity companies.
BETTER BUSINESS

It appears as the second most priority trend for the group of traditional companies. The original meaning of this trend is that consumers look for companies that they know are going to do something useful for society with the profits that their customers generate. In this sense, all agree that consumers traditionally have a certain distrust of electricity companies, either due to ignorance of how the sector operates or because of its complexity. They are therefore aware that they have to work to generate “positive values that impact the customer”.

Although they all seem to want to convey these types of positive values to society, the level of specifying regarding which values or attributes are those that should be promoted most differs:

1. Some people think that the key is to achieve a much more emotional brand image in general that connects with customers and distinguishes the company as one that does well, generates progress and seeks the good of society. However, the emotional side on which they want to position themselves is not specified.

2. On the other hand, there are companies that specify their vision more and consider that there is a great opportunity to position themselves around clean energy or around energy poverty even having planned or ongoing initiatives such as monetary donations or not cutting off electricity in cases of bankruptcy.

UBITECH

It refers to technology as a means that connects and shapes key aspects of society, where it no longer makes sense to talk about offline and online worlds since the customer is looking for an ultra-connected experience. It is the third trend in terms of priority for traditional companies, since for the majority digitisation is “a mandatory action area”. Also in general it is perceived as a trend closely linked to “Information Universe” since technology is the necessary means that can enable customer data capture in order to offer more personalised products and services.

Within the multiple aspects that technology offers, the three most relevant areas for these companies are:

1. Simplification of customer processes. Digitisation can help make life easier for customers at critical points that have traditionally generated a large volume of claims or complaints for companies. Thus, specific examples such as the photo bill pursue this objective.

2. Multiple channels. The possibility that customers can interact with their company through their preferred channel at any time without there being a break in the process, thus achieving a “seamless experience” throughout their customer journey.

3. Global or market initiatives. The participating companies are also working on aspects more related to the electricity grid in general, for which a regulation needs to be developed in which technology is a key lever, such as smartcities, smartgrids, etc.

It should also be noted that many of these technological initiatives are not developed internally but are carried out in collaboration with specialised technology companies or start-ups that provide a specific technological solution.
This group includes the trends that only one company considers within its top 3 priorities, while the rest have been discarded from their short- or medium-term plans. Therefore, the fact that there is only one company working on a trend as a priority may mean that, if it is developed and implemented well by the company in question, it could be a differentiating factor.

**TALENT COMPANIES**

The objective of this trend is to update the organisational structures and key roles of companies to attract young talent and respond to the market. This new talent often looks for flexible organisations that offer career promise and professional development that is different from traditional standards. Horizontal structures, more open work and collaboration models, agile and dynamic work spaces, etc. are some of the points that can attract this type of profile.

According to this study, this aspect is not a general priority in the traditional electricity company sector. While all companies claim to be working somehow on this trend, the reality is that only one places it in its top 3 of priorities.

Some of the initiatives that are being implemented by these participating companies are:

- Rejuvenating the staff. Some companies have realised that their average age was high and have decided to rejuvenate the workforce with young and multidisciplinary people, going from being a company focused on the engineering point of view to business with people in culture in other areas, or for example with young Managing Directors under 40 years of age.

- New profiles, careers and areas. Other similar companies create employee profiles from scratch or create new areas that bring together young talent and that enable new ideas and visions to be incorporated into the organisation progressively. The objective in these cases is to attract young talent from the beginning of their professional career.

- Profiles of other sectors. Hiring people with relevant experience in other sectors to bring new practices and visions to the energy sector.

These companies argue that the main barrier, in any case, is that not all companies are committed to young and multidisciplinary talent as a strategic axis to differentiate and innovate. In general, many consider it important, but few really consider this type of management to stand out in the sector.

The main barrier to making current structures flexible is the complexity of the sector and the need for deep technical and business knowledge. Therefore, most companies believe that these aspects should be incorporated little-by-little into the sector.
A second level of priority includes trends that have been identified generally by participating companies as important to be taken into account in the long term but perhaps not in the short term. However, there are important nuances between participants so it is worthwhile to deepen them individually.

BETTERMENT

This trend understands that the search for betterment can manifest in many ways; better health, greater knowledge, acquisition of skills, etc. When consuming a new product or service, customers look for the way that the experience offered translates into an improvement in the life of those who consume it.

For most participants, it is an important trend to be taken into account, but not enough to make it a short-term priority, even being discarded by one of the participants.

Unlike in other sectors, where this trend is associated with improving well-being through individual challenges or objectives such as “SportWatch”, almost all agree to associate this trend with energy savings.

Through apps. Monitoring real-time consumption and direct communication with customers where personalised advice is offered to promote savings are some initiatives and ideas that companies put on the table to break with the image of the traditional electricity company.

The main barrier encountered by the sector is the distrust that customers have with companies, so everyone agrees that earning their trust is one of their primary objectives.

FUZZYNOMICS

Esta tendencia explica que los consumidores pasan a formar parte del proceso de producción, convirtiendo This trend explains that consumers become part of the production process, becoming “prosumers” (consumer producers). The line between producer or service provider and consumer becomes diffuse.

Like Betterment, the consensus of this trend is not homogeneous, some companies consider that it is not a priority, while the others consider it a priority in the short or medium term.

There is generalised knowledge about self-consumption or self-generation, they all agree that it will arrive and they will have to face it. Those who consider this trend a priority say that “you have to look for the opportunity, far from seeing it as an inconvenience”, so you have to offer amenities to customers to be producers or have renewable solutions in their home.

One with an opposing view believes that, although self-generation will come, it may not be as cheap as the customer thinks.
HELPFUL

This trend makes consumers look for brands that provide solutions. Convenience is sought, aiming to become a global partner or provider of consumer services.

There is no clear consensus on this trend: some companies clearly see that it is not a priority, while the others consider it a priority in the short or medium term.

Most companies associate this trend with the “Multi-utility” concept, where they can create a greater variety of services that provide an overall solution for the customer.

The companies identify two ways to develop this trend:

- Internally. Where specific areas are created corresponding to the development and implementation of services in different sectors in order to be a global provider.
- Partnership. Create alliances with other companies in other service sectors that can meet the needs of their customers.

Another point of view identified by another part of the sector is the generation of different services but always linked to energy, such as solar panels or other sources of energy with maintenance, solar energy, energy audits or sustainable mobility.

One of the negative aspects that make this trend a non-priority is the rigidity of the new Spanish Personal Data Protection Act, where express customer consent is needed in order to sell other services and which is not currently in the contracts.

POST-DEMOGRAPHIC

This trend refers to the change in the variables that are used to segment customers, from traditional socio-demographic aspects (age, marital status, address, etc.) to other types of variables that take consumers’ consumption habits and lifestyle into account. In fact, behind the same consumption there may be different realities of households that have different needs.

There is no clear consensus by the participating companies regarding this trend, with some that do prioritise it while others do not have it in their short-term strategy.

Companies that prioritise this trend argue that today they have very little information from their customers and that they could complete it with other information (life habits, expectations, aspirations, etc.) in order to create personalised tariffs or other products and services. These companies argue that consumption is not the only useful variable to get to know their customers well.

On the other hand, other companies that do not consider this trend as a priority explain that with the information that is already available, it is already possible to create differentiated and customised products and services for each customer based on their needs. In fact, “socio-demography explains electricity consumption in the vast majority of cases,” not contemplating other types of more qualitative information at the moment.
Finally, there are the trends that are not prioritised or directly discarded by traditional companies.

**CLUB GENERATION**

In this trend, the customer aspires to project an image and belong to a group that identifies with the values that a brand, product or service projects. Except for one traditional company, this trend is not important enough to be prioritised either in the short or in the long term.

Some participants who have not prioritised this trend affirm that, “small companies are an incentive for large companies; they have made them think” because they consider that customers share a common feeling of rejection towards traditional companies.

This rejection is generated by the new aspirations or needs that most customers are experiencing. A greener commitment, values that create brand belonging and differential products or services and aligned with sustainability are factors that influence when opting for one type of electricity company or another.

Those who are most in favour of this trend see it as important to be disruptive within the sector. The reality is that customers feel different to be part of a different company and that the rest of their neighbours know.

**LOCAL LOVE**

This trend reveals the local area as positive and necessary to have unique experiences and enjoy them beyond the physical. The sector understands this trend as giving added value to the origin of the energy or to the sites of the supplying companies.

Despite being a trend that no participant has prioritised, there are positive aspects, or topics to be discussed, that could change their minds in the future.

Local differentiation is the main argument they identify to provide value to the customer. With this, they aim to identify themselves with the values of the area where they are present and differentiate at the communication level according to the different geographical areas.

The main argument of those who most reject this trend is that “the origin of the electrons of concrete generators does not bring any value to the customer”, so their efforts with the customer are focused on other trends.
PLAYSUMMERS

This trend shows the application of game concepts and techniques as a way to capture customers’ attention, motivate them and make them share in the experience.

There is a lot of consensus for this trend when it comes to de-prioritising it. There is a well-formed overall opinion about the low value of gamification in the utilities sector for improving engagement.

The main factor is that it has not triumphed in other sectors, and this being one of the sectors with the worst NPS of all, there is no motivation or conviction to take tactical or strategic actions based on this trend.

It should be noted that some have organised something similar at exhibitions and conferences or on corporate websites, although not achieving any remarkable success.

PRICING PANDEMONIUM

Fixing different tariffs for the same service depending on who the consumers are and the point of the consumption cycle they are in is the basis of this trend.

Like Playsumers, this trend is de-prioritised by all companies.

The main function they consider of this trend is to design different types of tariffs or tariffs according to groups of customers or segments, thus being able to help in the energy poverty fight.

The main problem is again the harsh restrictions of the new Spanish Personal Data Protection Act that enters into force in 2018, where automatic decisions about customers are prohibited.
During the personal interviews, the participants analysed each trend and shared the negative and positive points they saw in each of them.

Once all the information from all the participants was compiled, it was grouped and synthesised in a homogeneous and ordered manner from most relevant to least relevant for each trend.

<table>
<thead>
<tr>
<th>Trends</th>
<th>Positive aspects</th>
<th>Negative aspects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Better Business</td>
<td>*Generating values that impact the customer&lt;br&gt;*Developing differentiating products beyond those of the sector&lt;br&gt;*Acquiring brand notoriety</td>
<td>*Possibility of generating common values in the sector that are not differentiators</td>
</tr>
<tr>
<td>Betterment</td>
<td>*Initiatives to promote consumption and savings optimisation&lt;br&gt;*Initiatives to achieve customer objectives related to their well-being&lt;br&gt;*Creating a new concept that breaks with the idea of the traditional electricity company</td>
<td>*Customers’ distrust of the sector&lt;br&gt;“Customers think: An electricity company that wants me to spend less? I don’t think so”</td>
</tr>
<tr>
<td>Local love</td>
<td>*Differentiation through identifying values, products and local presence&lt;br&gt;*Differentiation at the communication level&lt;br&gt;*Generating a sense of brand belonging</td>
<td>*Irrelevance of the origin of energy</td>
</tr>
<tr>
<td>Club Generation</td>
<td>*Offering customers various options that differentiate&lt;br&gt;*Conveying an image of the company to the customer that differentiates it from the rest&lt;br&gt;*Creating company/customer links&lt;br&gt;“Customers want to feel cool”</td>
<td></td>
</tr>
<tr>
<td>Information Universe</td>
<td>*Creating a business with greater customer focus and customer orientation&lt;br&gt;*Greater concern for the customer&lt;br&gt;“One of the customer’s barriers is the bill, and if it is a problem, we want it to go unnoticed”</td>
<td>*Growing customer demand</td>
</tr>
<tr>
<td>Post-Demographic</td>
<td>*Segmentation of customers by variables different from traditional&lt;br&gt;*Obtaining relevant customer information</td>
<td>*Justification of electricity consumption by socio-demographics that can explain the vast majority of cases</td>
</tr>
</tbody>
</table>
### 2.2 Study results: traditional companies

<table>
<thead>
<tr>
<th>Trends</th>
<th>Positive aspects</th>
<th>Negative aspects</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pricing Pandemonium</td>
<td>*Segmenting customers according to the collective in order to design the pricing</td>
<td>*Entry into force of the Spanish Personal Data Protection Act in 2018, which is very restrictive</td>
</tr>
<tr>
<td></td>
<td>*Creating a specific pricing team for the design</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Promoting actions aimed at the fight against energy poverty</td>
<td></td>
</tr>
<tr>
<td>Playsummers</td>
<td>*Initiatives that offer a good customer participation experience</td>
<td>*Low degree of engagement with customers</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>“The average NPS of the sector is the worst of all sectors”</strong></td>
</tr>
<tr>
<td>Helpful</td>
<td>*Creating a new service area because the customer demands it</td>
<td>*Distrust of the customer, who is less permissive with large companies</td>
</tr>
<tr>
<td></td>
<td>*Creating synergies with third parties</td>
<td>*Entry into force of the Spanish Personal Data Protection Act in 2018, which is very restrictive</td>
</tr>
<tr>
<td>Ubitech</td>
<td>*Progression of the trend towards digitalisation, which is key in the sector. Many companies have important initiatives such as smartcities or electronic billing among others</td>
<td>*Demand for personalised customer service from the customer in different circumstances</td>
</tr>
<tr>
<td></td>
<td>*Generating increased trust among customers</td>
<td></td>
</tr>
<tr>
<td>Fuzzynomics</td>
<td>*Offer facilities and solutions to the customer for self-production and self-consumption at home</td>
<td></td>
</tr>
<tr>
<td></td>
<td>*Adopting the idea of self-consumption as an opportunity, not a threat</td>
<td></td>
</tr>
<tr>
<td>Talent Companies</td>
<td>*Hire young and multidisciplinary talent</td>
<td>*Imposing restrictive budgets</td>
</tr>
<tr>
<td></td>
<td>*Hire new people to create culture and specific profiles</td>
<td>*Search, usually, of profiles with experience in the sector</td>
</tr>
<tr>
<td></td>
<td>*Creating new areas such as Digital, Analytics or BI</td>
<td></td>
</tr>
</tbody>
</table>
There are clear peaks in the trends that have been considered to be the highest priority. These trends are “Talent Companies”, “Helpful”, “Information Universe” and “Better Business”.

On the other hand, there are also trends that appear with low priority and are even generally discarded, such as Playsumers, Pricing Pandemonium and Post-Demographic.

Si se agrupan las tendencias en los grupos explicados previamente, el resultado sería el siguiente:
TALENT COMPANIES

All emerging companies agree that this trend is one of their priorities, always placing it in their Top 3. More than a priority, it is a basic pillar that supports their development and success. “The foundations of a company are the sum of its talent” is one of the many statements that give reason to their philosophy and their way of viewing the way people and businesses are managed.

Algunos de los puntos de vista en esta nueva gestión son:

- New way of thinking. Different people, where age does not matter, who know how to see beyond what the sector offers and that provide differential value are the qualities that these companies seek to lead their different areas.

- The office is not just an office. Making sure that people who go to work can balance their personal and professional lives, or that there is a range of services that provide a differential value, are premises that are intrinsic in the DNA of these companies. Benefits for employees such as childcare, yoga, crossfit, etc. or flexible hours are initiatives that are currently taking place.

- New organisation model. New ways of creating a governance model based on suppliers as responsible for products, services or areas where hierarchies are diluted and a diffusion of roles appears.

Some participants affirm that “the lack of talent in most cases is due to ignorance of the market itself”, since in many cases companies do not know what profiles they need or how they can obtain them.

HELPFUL

Most companies agree to prioritise this trend in their Top 3 since their short-term vision is “to be the link between the customer and the rest of the market”, although there are different points of view:

- Problem solver. Most customers do not know how kWh works or do not know who is really responsible for their problems. The tactical actions of this aspect of this trend are to postulate the customer as a problem solver and to be the link between distributor and company so that the customer can obtain a quick and concrete solution.

- Overall service provider. Viewing households as a single customer with different segmentations and needs, just like any other customer may be the case since “Home is a subject with needs”. Not only the electricity sector, also plumbing, telephony, etc. and other services provided and managed by a single provider. Benefits such as unification of bills or single customer management are some that have been identified.

Although it is customer distrust in the sector and the de-positioning of some services compared with others that are more mature that causes this new model of business not to advance as fast as desired.

On the other hand, there are participants who discard this trend directly since they were not created to be a service provider, but to “offer green energy”.

2.3 Study results: Emerging Companies

TALENT COMPANIES

HELPFUL
INFORMATION UNIVERSE

Not as prioritised as those mentioned above, only once in the Top 3, and the rest in the second level. However, it is very important for all of them, since they share the same premise: “make life easier for the customer”.

They all agree on the importance of having well-identified customers, and to achieve this, a large amount of data that revolves around them needs to be managed.

Two ways to achieve this are identified:

- **Product/service personalisation.** Consumers are an inexhaustible source of information, either directly or indirectly. Directly, sharing their data and needs to find the best solution that suits their lives. And indirectly through digital tracking and/or consumption habits. In one way or another and/or combining both sources, companies can create customised consumption packages and/or savings for different types of consumers.

- **Providing differential value.** It is useless to have an immense amount of data or customer information if it is not used to provide value. “If it doesn’t improve the lives of customers, we don’t do it”, is one affirmation of one of the participating companies. Giving smart advice about electricity uses or helping with the contracting process by offering safe tariffs are initiatives that the customer feels are different.

BETTER BUSINESS

As with the Information Universe trend, it is only prioritised once in the Top 3, and the rest in the second level. However, all agree that it is one of the most important trends today, they know that “The social debate about the world of energy exists”. All share the same vision when facing this trend, and it is to provide a differential value with the type of energy they supply, “to make a better world”.

But in addition to this common factor, it has been detected that there are different lines of action required to achieve this goal:

- **If it’s good for the customer, it’s good for us.** Due to the type of energy that is supplied, the customer as well as the company and society benefit. Another initiative is making sure that the customer saves. In this way, the company also saves as it generates less costs.

- **Positioning in social values.** Electricity is a commoditised product for consumers, so the focus must be placed on positioning in social aid. For example, redesigning the Social Subsidy to solve energy poverty so that those who need it most can enjoy it.

- **Energy supplied.** Providing 100% renewable or clean energy makes these companies look for different positioning than other companies tend to look for. “We create a company to make the world better”.
CLUB GENERATION

As in the case of traditional companies, only one trend is identified as a differentiator, although in this case it is Club Generation.

In the group of trends considered as differentiators, Club Generation has a very positive reception among all participants. They are all very aligned in the vision they have with the trend and in how they would address it in their companies, but only one of them dares to position it as a Top 3 priority when it comes to addressing it in a short period of time.

Two aspects that companies would consider when approaching this trend can be highlighted.

- Having differential values. Having a disruptive way of thinking to other traditional companies in the sector and offering different products and services such as clean energy. “Being different and doing things differently than the rest” is how participants summarise this concept.

- Feeling of belonging to a Brand. The design of a branding strategy to create a strong brand perception, together with the differential values explained above, are actions that can make customers feel part of the brand.

The main drawback or difficulty that the sector sees in this trend when it comes to addressing it is the little “engagement” that consumers have with the sector. They consider that customers see energy as something basic in their homes and this makes it very difficult to provide that differential value so that they feel the brand is their own.

The group of trends identified as important to address in the long term include:

UBITECH

Everyone has this trend in mind as a background and in a transversal manner. Everyone knows that they have to be up-to-date in technology and connectivity because it is a need they have to cover in the near future. In fact, they are defined as digital companies with digital customers.

But here there are two quite different points when it comes to understanding digitalisation and conceiving technology. That is why there is no homogeneous consensus when prioritising this trend that has even been discarded in some cases.
Technology is the basis of everything. The customer is connected almost 100% of their day to day and that is why companies need to provide a quality service according to their digital needs. Starting from a powerful website, apps and tracking devices are some initiatives that the market offers to consumers.

Technology is not the end, it is the means. Others think that technology should be for the use of people and therefore must use all their strength in developing usability well with technology as a background.

The reason why it is not a trend to develop in the short term is because in most cases it is a philosophy that is in its values and even in its raison d’être.

LOCAL LOVE

Unlike Ubitech, participating companies have a more heterogeneous vision for this trend. Some participants think that it could be a differential factor when it comes to adding value to their customers, while others think that although it is interesting, “it would only influence a small percentage of the population, not the majority”.

It can be considered that there are two different visions when addressing this trend:

Focused on the local customer. Consumer behaviour is different by province, so the approach and the way to impact them must be different. It is important to create publicity actions, communication, loyalty, etc. customised by geographical areas.

Focused on energy. Some companies do not believe in the origin of the source; that is, the origin of their energy does not add value to their customers; although they do focus on the type of energy they supply, on the “what”.

“In 10 years, customers will be energy producers.” Under this premise, some companies are aware that electricity self-consumption is a reality that they have to face, so they know that sooner or later they have to adapt their business model to this situation. There is one company which in fact is already working on developing this business model or even claiming that “it is part of its DNA”.

Others, despite knowing this reality, are not going to focus their business model towards this trend. They prefer to devote all their efforts to focusing on other trends.

Finally, in the group of discarded trends, there are those that the great majority, or all, have decided not to take into account or not to address them:

**BETTERMENT**

This trend has been de-prioritised by all participants, except for one, which prioritises it on a second level.

There are different points of view on this trend, taking into account the value provided to the customer and the target to which it could be addressed, it can be classified into three different aspects.

- Private customer. One way to improve customers’ day-to-day lives is to help them to manage their consumption, so that they perceive that they can save. “It is a way of showing that the company is improving with them since they are the customer” would be one of the premises that one of the companies identifies for this trend.

- Company. “People are not aware of what a kWh is, they do not understand it, and so it’s difficult to show them that they can save.” In this way, this participant focuses on this trend towards savings in companies, where there is more margin for optimising consumption and greater savings can be perceived, being able to adjust their power to real use.

- No value contributed. Others, however, think that really monitoring consumption is something ephemeral in the life of consumers. The use of apps or tools that help save electricity tend to stop being used when other priorities appear in consumers’ personal lives. In addition, they say that “saving energy should not go against the comfort of customers”; that is, it should not cause a change in their habits and routines.
ENERGY CONSUMER TRENDS

In favour of segmentation. In addition to segmenting the population with socio-demographic variables, this part of the sector is in favour of using more qualitative data from customers, which combined with these traditional variables, can create customer profiles more associated with their lifestyle or consumption habits. Some of these variables are browsing patterns, types of devices, operating systems of the devices themselves or web domains that are accessed, among others.

No segmentation. “In this sector there is no segmentation”, this part of the sector considers that currently it is not segmented, and if it is, it does not add value since the products or services are offered to all customers regardless of the segment they belong to.

Another way identified to classify customers is through the overall interactions that they have with the company during their life cycle; to achieve this, customer management tools that enable information storage are needed.

POST-DEMOGRAPHIC

This trend is in the same situation as Betterment. It has also been de-prioritised by all participants, except for one, which prioritises it on a second level.

There are two visions for this trend: on the one hand, a part of the sector does believe that it must be segmented beyond traditional or socio-demographic values; however, on the other hand, it believes that there is hardly any segmentation, or if it exists, it is not differential in the business model.

Pricing Pandemonium

This trend has been de-prioritised by all participants because it is difficult to assimilate within the sector.

The complexity and limitation of designing the product or service tariff is the main reason why companies do not end up prioritising this trend.

PLAYSUMMERS

This trend, like Pricing Pandemonium, has also been de-prioritised by all companies. They do not believe that it is a strategic line to prioritise. They say that it is more important to make things simpler, more usable and fun to get “your customer service.”

Some ideas included are ranking of efficiency and energy consumption in neighbourhoods.
During the personal interviews, the participants analysed each trend and shared the negative and positive points they saw in each of them.

Once all the information from all the participants was compiled, it was grouped and synthesised in a homogeneous and ordered manner from most relevant to least relevant for each trend.

<table>
<thead>
<tr>
<th>Trends</th>
<th>Positive aspects</th>
<th>Negative aspects</th>
</tr>
</thead>
</table>
| **Better Business** | *Generating benefits for the customer and for society*  
*Producing clean and sustainable energies*  
*Managing the company based on honesty and transparency*  
"It’s a very commoditised product, where you have to be able to make the leap to do something for others" | *Lack of positioning in strategies based on social values* |
| **Betterment** | *Initiatives that contribute value to the customer, improving their habits and their day-to-day lives.*  
*Encourage energy savings and sustainability*  
"If you only communicate with the customer when sending bills, you are just another company". | *The concept of saving is not contrary to comfort* |
| **Local love** | *Differentiation through strategies of impacting the customer based on geographical areas* | *Impacting a small percentage of the population*  
*Little conviction of the origin of energy as a differential factor* |
| **Club Generation** | *Generating differential values that break with the sector*  
*Generating the perception of belonging to the brand* | *Little engagement between customer and sector* |
| **Information Universe** | *Utilising customer information to offer products, services and more personalised communications*  
*Greater perception of added value by the customer*  
"If it doesn’t improve the lives of customers, we don’t do it" | |
<p>| <strong>Post-Demographic</strong> | <em>Designing customer segmentations based on utilising behavioural variables together with traditional variables</em> | |</p>
<table>
<thead>
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</tr>
</thead>
<tbody>
<tr>
<td>Pricing Pandemonium</td>
<td>*Offering personalised tariffs where the customer has decision-making capacity.</td>
<td>*Complexity and limitation when designing the tariff *Little conviction that the personalised tariff provides added value</td>
</tr>
<tr>
<td>Playsummers</td>
<td>*Generating engagement and trust *Gamification proposals with usable and fun functionalities “Make a world in which you are inundated with information fun”</td>
<td></td>
</tr>
<tr>
<td>Helpful</td>
<td>*To be the reference service provider that acts as a link with the rest of the market *Be a problem solver for the customer *Creating unique customer management “The home is a subject with needs”</td>
<td></td>
</tr>
<tr>
<td>Ubitech</td>
<td>*Generating more agile processes thanks to digitalisation *Promote digitisation among customers</td>
<td>*Greater focus on improving usability, not so much on technology. “Technology is not the end, it is the means”</td>
</tr>
<tr>
<td>Fuzzynomics</td>
<td>*Posicionamiento del cliente en el proceso productivo generando sentimiento de pertenencia.</td>
<td></td>
</tr>
<tr>
<td>Talent Companies</td>
<td>*Incorporación de nuevas formas de pensar para generar un nuevo modelo de negocio *Nuevos conceptos de oficinas y filosofías de trabajo *Nuevos modelos de organización “Los cimientos de una compañía es el talento que hay dentro”</td>
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2.4 FINAL CONCLUSIONS

From the overall analysis of results, considering both traditional and emerging companies, the common importance of the “Information Universe” trend stands out. This general consensus is explained by consumers’ expectations that they have to be the centre of the companies’ customer service and, consequently, by the effort they are making to provide value with customised products and services adapted to their needs. This expectation is also aligned with the requirement of transparency in the customer/company relationship, very characteristic of the customer in the energy sector. In the sense that if companies have detailed information, whether primary or their consumption data, they expect a value proposal and an increasingly personalised experience. However, both the expectation of the customer/consumer and the response from the companies/suppliers are evolving. And this evolution is being projected in the future based on the sophistication of energy consumption and its products and services (“digitised” customer service, management capacity and proactive advice), which translates as trends already “in progress” such as Ubitech and Helpful.

Also in common with the two classification groups, traditional companies and emerging companies, the Better Business trend can be highlighted. It has different interpretations in the practical translation of doing something useful for society with the profits that its customers generate. Beyond the Corporate Social Responsibility, it turns out that the need to meet the positioning demanded by consumers is a common thread in all the companies participating in this study.

Focusing on the notable trends that are prioritised by some companies and not by others, the Talent Company trend is common in emerging companies, which is also observed as a differentiator between the group of traditional companies. This seems to be one of the keys in the strategy when it comes to attacking the market, with a specific way of understanding the customer’s expectations and needs through new governance models and developing a broader service offering than that of an electricity company. The same objective is observed with the Club Generation trend, which marks a search for differentiation and stands out in the positioning within the group of emerging companies.

It remains to be seen how the future vision of energy consumers will be fulfilled and how its reality will continue to be influenced by the expectations imposed or answered from other sectors. How technology and digitalisation, in addition to social values, will continue to be the most prioritised key aspects, or to what extent companies will look for other lines that are not prioritised in this study. The truth is that the energy sector presents a significant level of dynamism as it stands out from the results.
APPENDIX
1. METHODOLOGY

It consists of three parts; filtering and grouping trends according to their subject, in three different blocks, personal interviews where the trends are the centre of the conversation and a prioritisation exercise.

2. FILTRATION AND GROUPING

These trends have been divided into three major blocks according to their nature and theme: consumer behaviour, time of purchase and macro environment of the sector.

Block 1- Consumer behaviour: habits, thoughts, lifestyle and consumption that mark or influence the customer in selecting a service or product. The trends within this block are: Better Business, Betterment, Local Love, Club Generation.

Block 2- Moment of pursache: external and internal factors of the company that influence or affect the contracting or purchase of a product or service. The trends within this block are Information Universe, Playsumers, Helpful, Post-Demographic, Pricing Pandemonium.

Block 3-Macro Environment of the sector: the situation the utilities sector is in that affects the time to understand the business by companies and by customers, in some cases more indirectly. The trends within this block are: Talent Companies, Fuzzynomics, Ubitech.

3. PERSONAL INTERVIEWS

everis conducted personal interviews with the following executives of the participating companies:

- EDP Spain - Ramón Bobes. Studies Director.
- Feníe Energía - Isabel Reija. CEO.
- Gas Natural Fenosa - Carlos Escolíes. Residential Market Director.
- Holaluz - Carlota Pl. CMO and Founder.
- Lucera - Emilio Bravo. CEO and Founder.
- Podo - Jorge Capilla. General Manager.
- Viesgo - Douglas Medrisch. Retail Director.

4. COMPARATIVE AND PRIORITISATION SYSTEM

A system of prioritising trends according to their importance within the company in the short term has been made. To do this, within each block and independently, each participant prioritised the trends from highest to lowest importance within their company.

Next, the two most important trends of each Block were taken and of the six trends obtained, they were prioritised from lower to higher importance, thus giving two levels. The first level formed by the three most prioritised trends, the so-called Top 3, and a second level of prioritisation including those from position 4 to 6.

The rest of the trends would be relegated to a third level, considering non-prioritised trends.
Report written and coordinated by the everis Utilities team:

**Héctor Pinar**  
Partner for Utilities & Energy

**Ricardo Santos**  
Business Consulting Partner for Utilities & Energy

**Ignacio Madrid**  
Digital Lead for Utilities & Energy

**Carmen Velasco**  
Business Consulting Director for Utilities & Energy

**Javier Conde**  
Senior Manager for Customer practice  
at Business Consulting

**María Eugenia Barrantes**  
Business Leader for Utilities & Energy

**Jorge Fernández**  
Consultant for Customer practice

**Carolina Román**  
Business Analyst for Utilities & Energy
attitude makes the difference

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