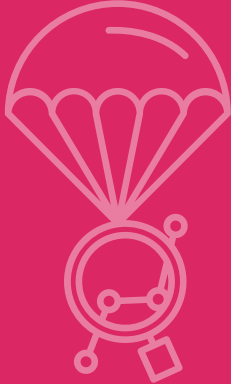


Essential Services Commission Victoria Energy Market Insights

Research Report – July 2021



Background and Research Objectives

The Essential Services Commission has commissioned research to better understand the barriers to engagement with energy market retailers and energy plans.

A large portion of consumers are disengaged with energy, however there is lack of clarity as to why this is and how these engagement barriers can be overcome.

With communications and policy interventions at their disposal, the Essential Services Commission is looking to identify optimal ways to empower consumers to engage with and manage their energy retailing choices.

In order to inform these objectives, the research needs to...



Identify reasons for disengagement

Why are consumers disengaged and not actively managing their choice of energy retailer and energy rate plan?



Identify barriers in the journey

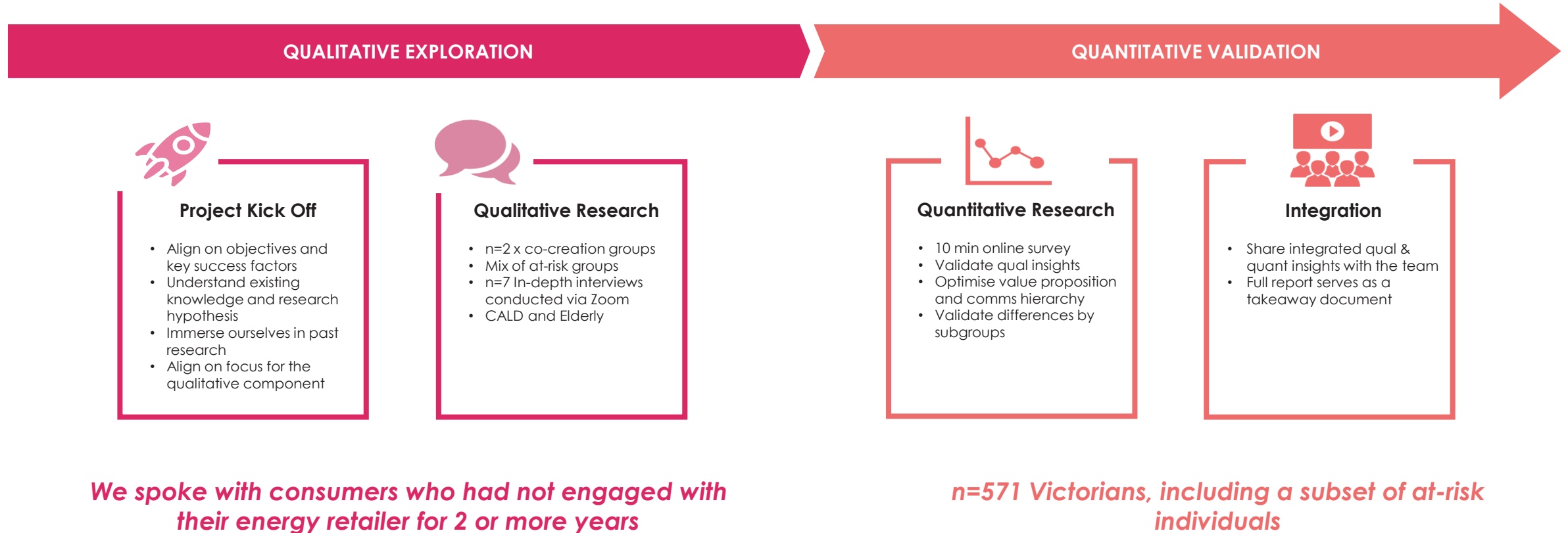
What barriers are preventing consumers from engaging more with their energy retailer and energy rate plan?



Identify communications and / or policy opportunities

How can communications and / or policy be best utilised to encourage and empower engagement?

We used a mixed methodology approach combining qualitative exploration to inform key themes followed by a quantitative survey to validate the findings



Methodology & Sample



Qualitative Research

2 x Co-Creation Groups (5-7 participants per group)

Mix of age, life-stage, occupation, income, tech literacy

7 x 1-hour one-on-one sessions

3 Seniors and 4 CALD

Household energy decision makers who had not reviewed their plan or provider for 2+ years



Quantitative Research

10 Minute Online Survey

n= 571 completed surveys

Representative of Victorian household energy decision makers

Sample boost of 'at risk' groups:

CALD n=30, ESL n=40, Under 30 n=107, Seniors n=154, Financial Hardship n=150, Unemployed n=45, Living alone n=96

Energy Review Journey



There are several opportunities in the review journey for the commission to engage energy consumers:

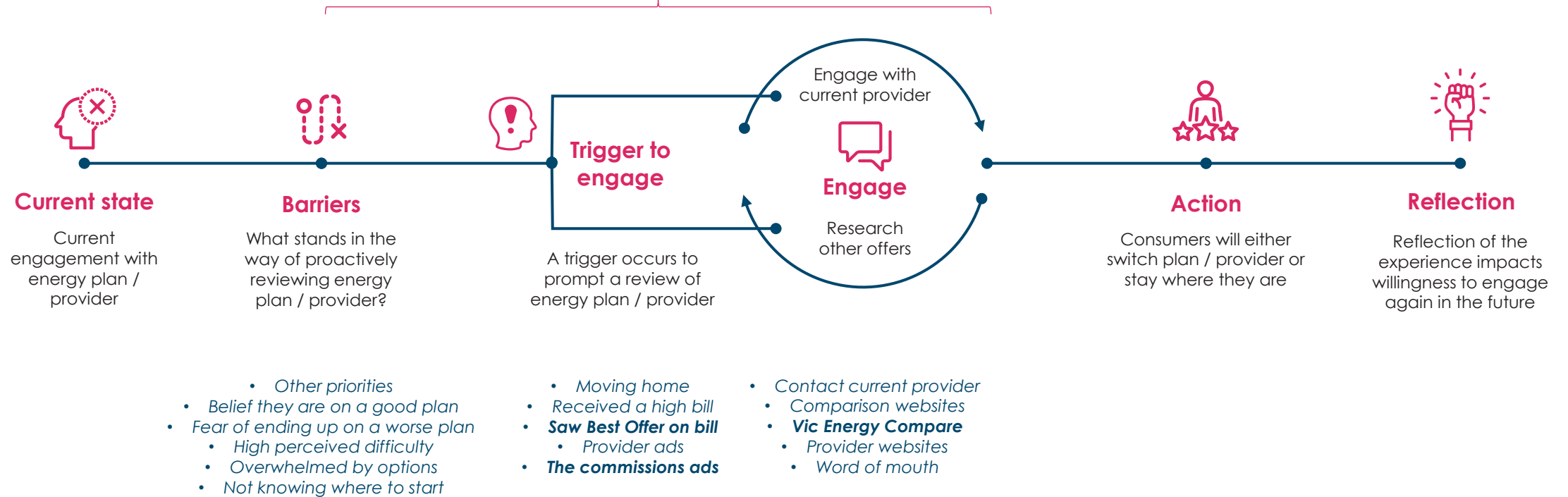
- The key barriers to engagement are belief they are already on a good plan, fear of ending up worse off, high perceived difficulty, being overwhelmed and not knowing where to start. Support in overcoming these barriers is key to motivating engagement.
- The decision to review is primarily reactive, most commonly triggered when moving home, receiving a high bill, seeing the 'best offer' on their bill, energy provider ads or the commissions ads.
- Comparison websites, including Vic Energy Compare are the most common channel used. Provider websites are also reviewed.



The commission has an opportunity to engage consumers at various stages of the Energy Review journey

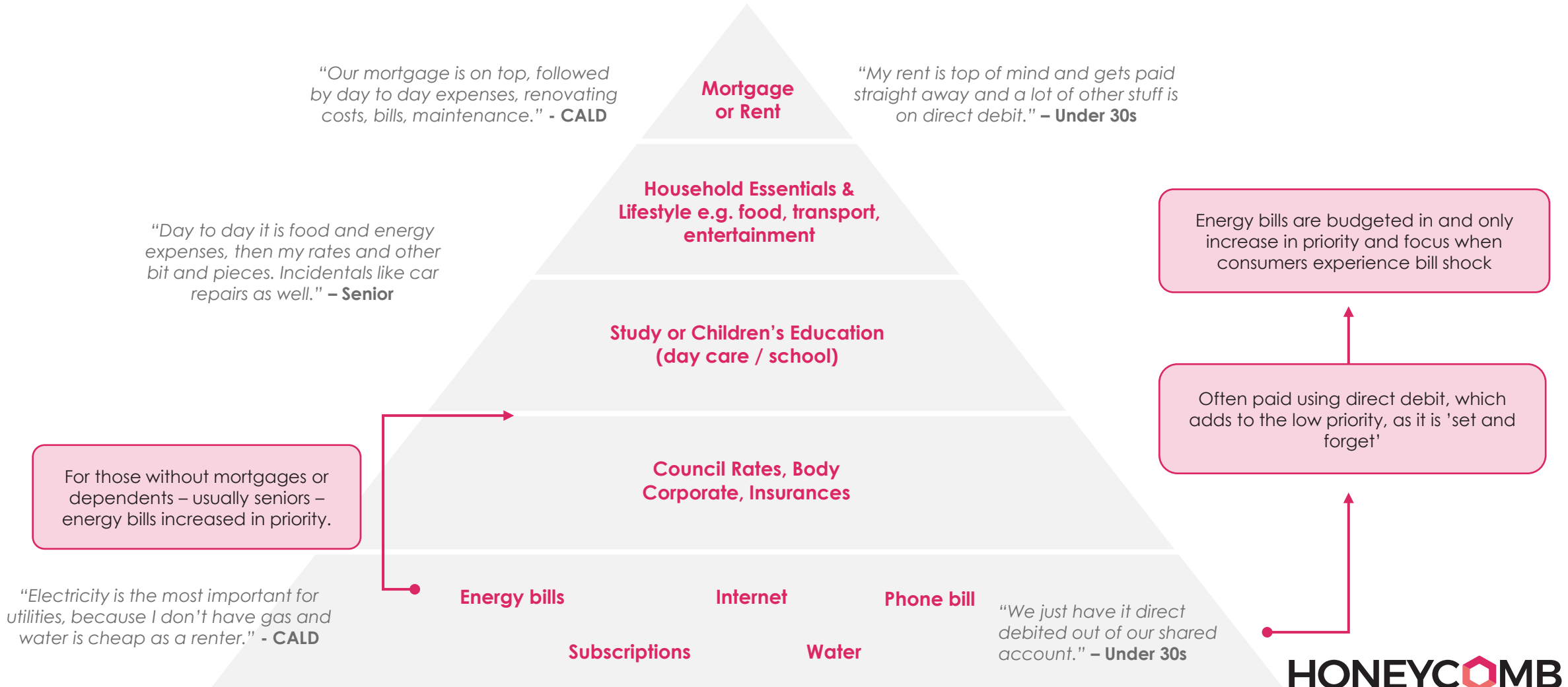
The Energy Review Journey

There are various opportunities to engage consumers throughout the Energy Review journey



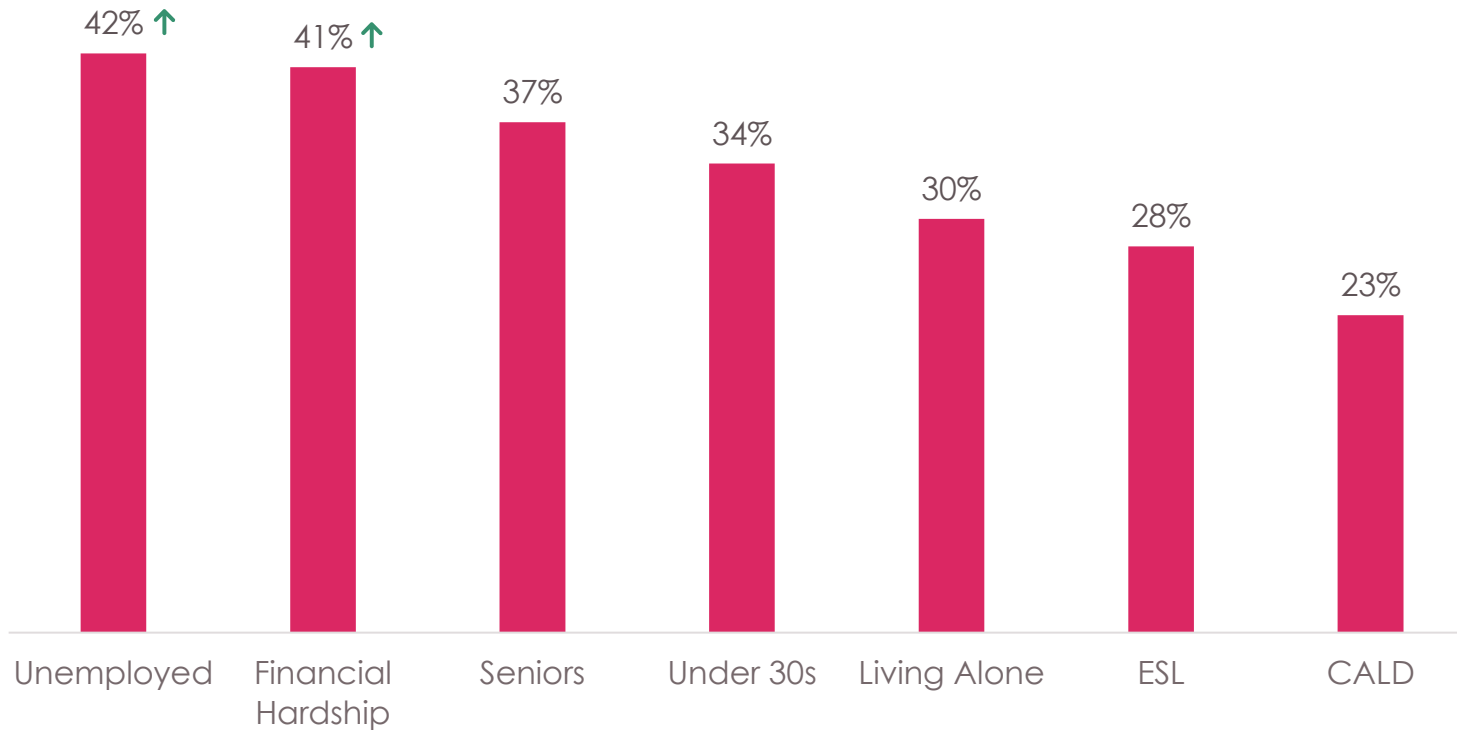
Energy bills are low on the hierarchy of priorities and less of a focus compared with larger, more urgent financial matters

With many other priorities, reviewing the energy relationship is not top of mind or perceived to be of great importance to consumers.



One third don't have any intent to review their plan in the next year. Those in financial hardship or unemployed are least likely to review

Not Intending to Review Energy Plan / Provider in the next 12 months



34%

of Victorians are not intending to review their energy provider or plan in the next 12 months

B2. When do you plan to next review your energy provider and rate plan? Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; Living alone n=96; ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence



Those who are intending to review are primarily motivated by their current financial situation, finding a better deal and moving house

66%

Of **Victorians** intend to review their energy provider and rate plan in the next 12 months

Financial Situation

"Just to keep on top of what the latest pricing/deals are, as I need to save as much money as I possibly can due to my financial situation."- **Lives alone**

Find a better deal

"I like to know that I am getting the best deal available and therefore I'd like to review my energy provider regularly."- **Under 30**

Financial Situation

"The bills kept coming and I am currently having problems keeping up with them, so I am always looking for how to minimise my expense."- **Senior, Financial Hardship**

Find a better deal

"I prefer to compare my energy costs annually in case I can get a better deal."- **Victorian**

Financial Situation

"To compare the rate plan with other energy companies as I struggle sometimes to get by with money. The best offer at a price I can afford is what is suitable for my current situation with money."- **under 30, Financial hardship**

Moved/ moving house

"I have recently moved, but kept the same energy provider. My recent bills have been a lot lower than my previous address. I'm tempted to check out Amber Electric to see if I can save even more."- **Financial Hardship**

Moved/ moving house

"We might be moving so we will probably review then."- **Victorian**

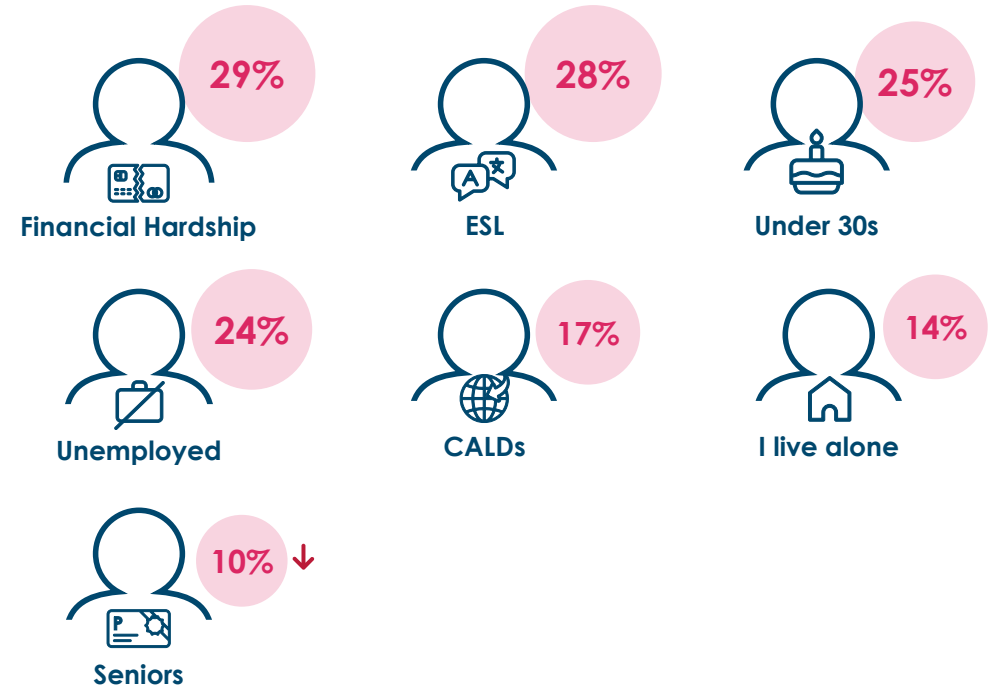
B2. When do you plan to next review your energy provider and rate plan? Total sample n=571
B4. Why do you intend to review your energy provider and rate plan in the next 12 months?

Significantly higher / lower at 95% confidence



The majority of Victorians believe they are on a good deal. CALD, those living alone, and seniors are most unlikely to believe they are paying more than others

Household Bill Comparison



B12. How do you think your energy bills compare with households that are a similar size to yours? Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; Living alone n=96, ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence

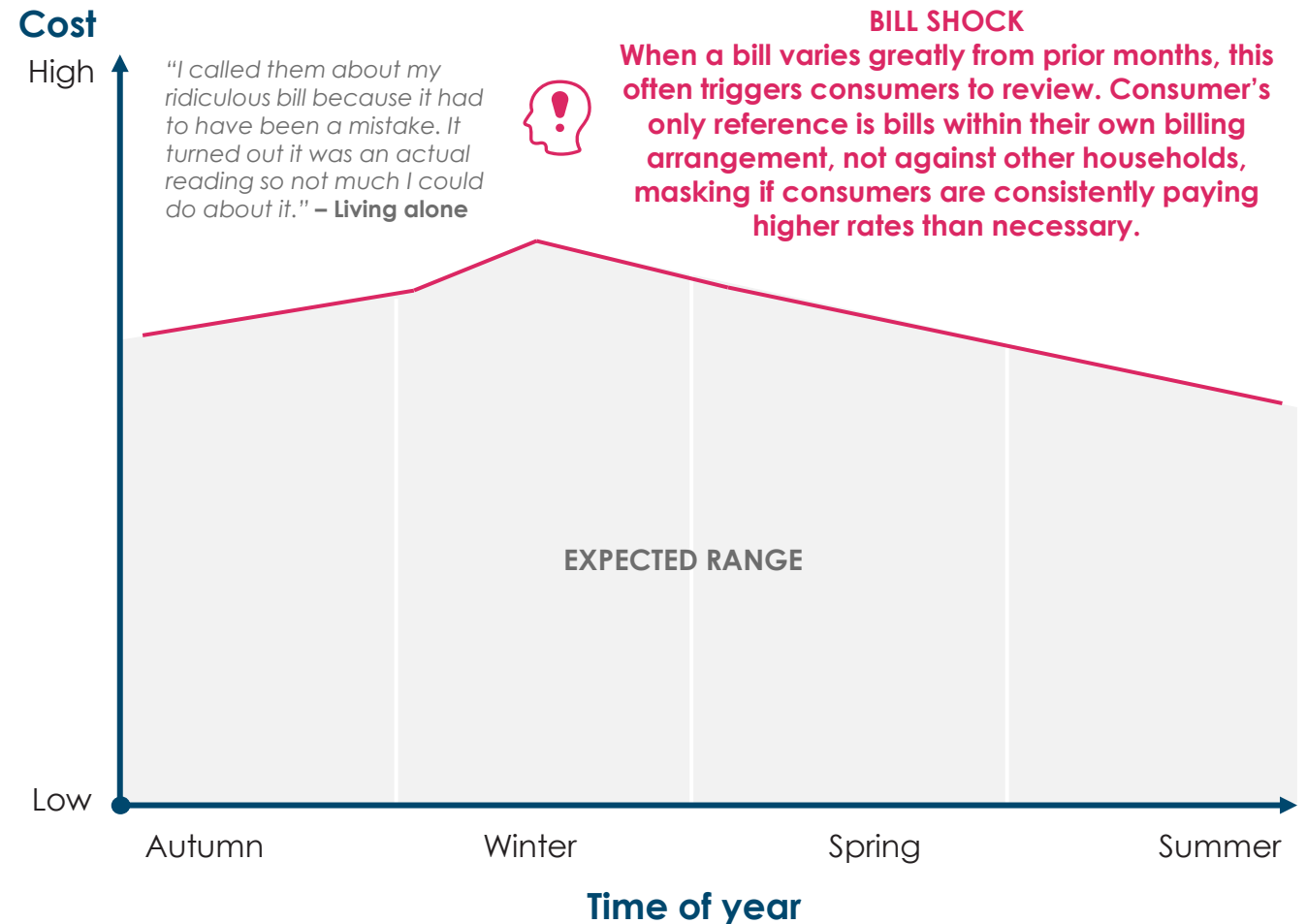


Consumers lack a reference point to identify if they are paying more than necessary, monitoring only *within* their billing arrangement

- The majority of Victorians believe their energy bills are 'about right' if they remain consistent month on month or quarter on quarter, factoring in some seasonality.
- By comparing against their own prior bills, consumers lack an external reference point to identify if they are paying more than they should.
- Indications on the bill of what a 'general household' uses in kw adds a further layer of misunderstanding, as it leads consumers to believe their billed amount is also likely to be in line with other households.

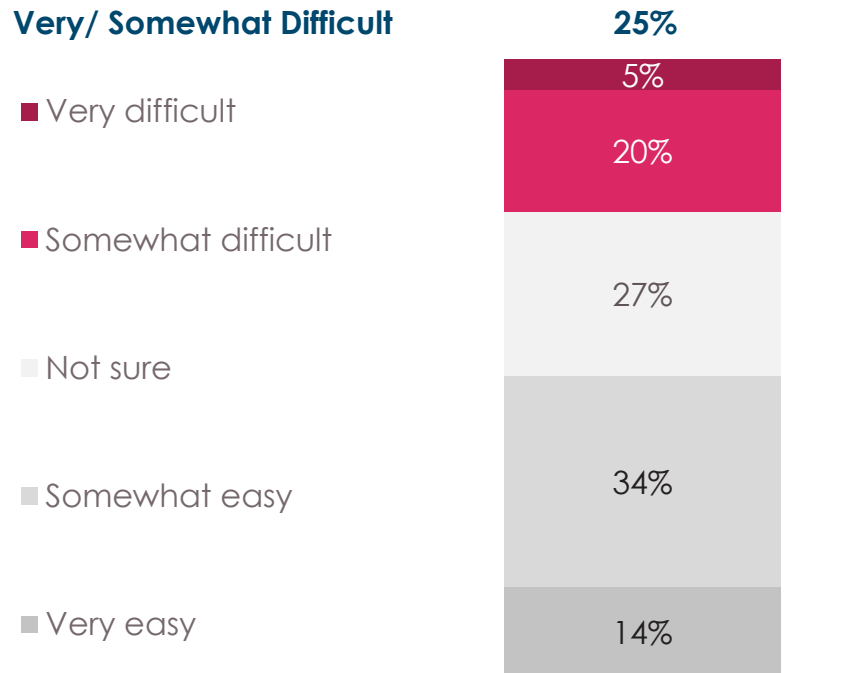
"My plan shows me comparisons that I pay each quarter and I just pay it if it looks ok." – **Victorian**

"We submitted our previous bill and they did a calculation to work out our new bill based on our prior usage." – **Victorian**



1 in 4 perceive the process of reviewing to be difficult, primarily due to the complexity of comparing the energy plans on offer

Difficulty to Review Energy Plan



"Trying to extract all required information from various providers and getting quoted from comparison sights gives different recommendations."- **Senior**

"I find it difficult to go through the process of having to call up and change plans if I decide to do so as sometimes I can feel pressured by the service provider to stick with what I've got."- **Under 30**

"The changeover process is quite simple, once you decide which plan You want; the difficult part is sorting through all of the suppliers and the myriad of plans that are available - You're never comparing apples with apples, so to speak, so the entire comparison process is a nightmare."- **I live alone**

"It is hard to compare the energy providers, it may be low price but higher rate, or some have the peak or non peak rate."- **Victorian**

B7. How difficult do you believe it is to review and change your energy plan or provider? Total sample n=571 B8. What makes it difficult to review and change your energy plan or provider? What are the challenges? Base n=157

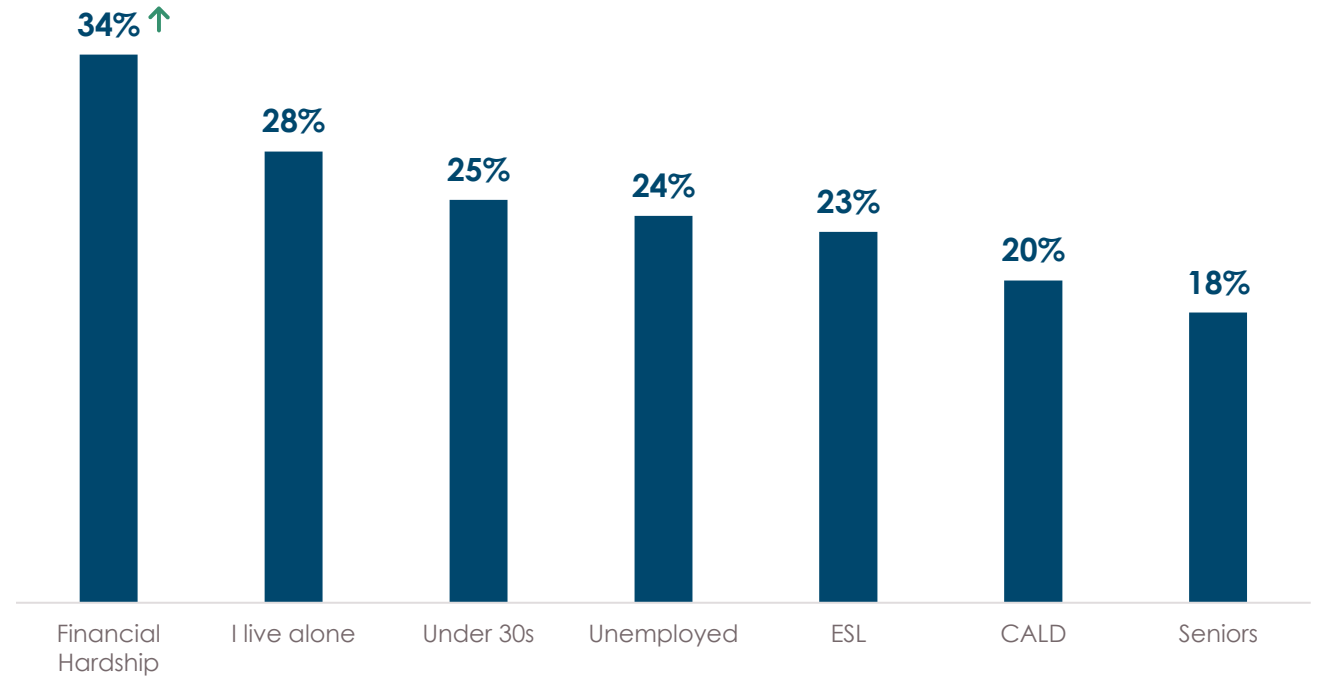
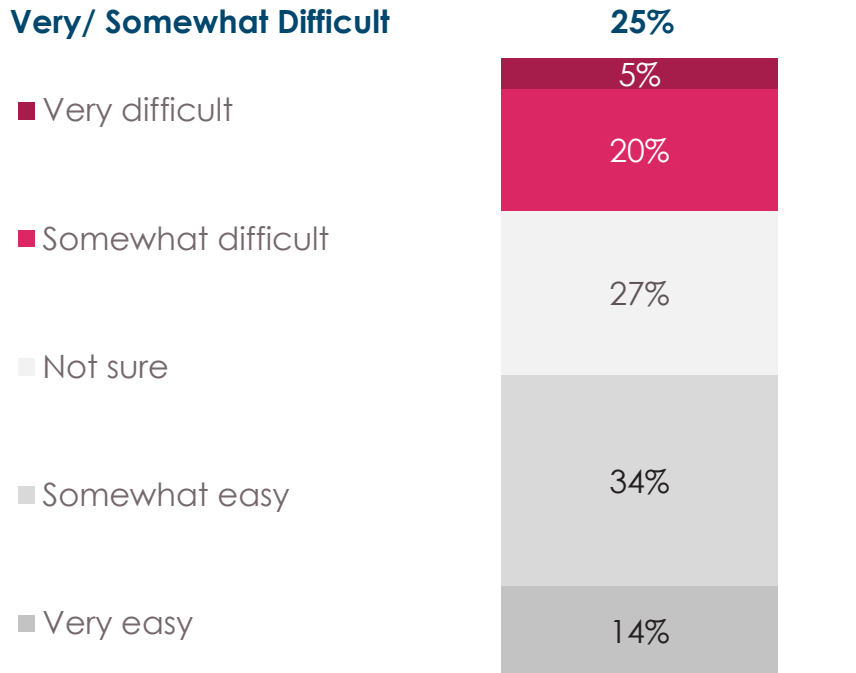
Significantly higher / lower at 95% confidence



Those in financial hardship are most likely to perceive reviewing their energy plan to be a difficult task

Difficulty to Review Energy Plan

Very / Somewhat Difficult to Review



B7. How difficult do you believe it is to review and change your energy plan or provider? Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence



Perceived complexity is driven by lack of understanding, overwhelmed by the number of options and not knowing where to start



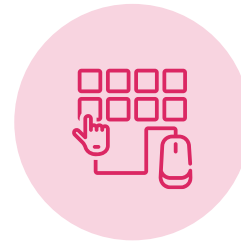
Lack of Understanding

There is a perception by many that retailers intentionally make it difficult to understand and compare plans (through varying ways of reporting kwh and on/off peak rates) in an attempt to limit the consumers ability to make an informed decision.

Many don't understand the basic constructs of energy pricing and therefore feel overwhelmed by the options presented.

"They throw all these words at your, kilowatt and I don't know what a fair price is and what is not."

- Senior



Overwhelm of Options

While having choice is considered a positive, the extent of offers in the market is overwhelming.

Many feel it will take considerable time to work through the options available in market as they 'want to do it right', therefore putting off the task.

"There is too much choice and it has an impact on my ability to make an informed decision. It makes me confused and a bit overwhelmed."

- CALD



Not Knowing Where to Start

Consumers will often put off reviewing their energy plan or provider as they don't know how or where to start. The overwhelming number of plans and providers in market has consumers confused about where to start to get credible advice or information.

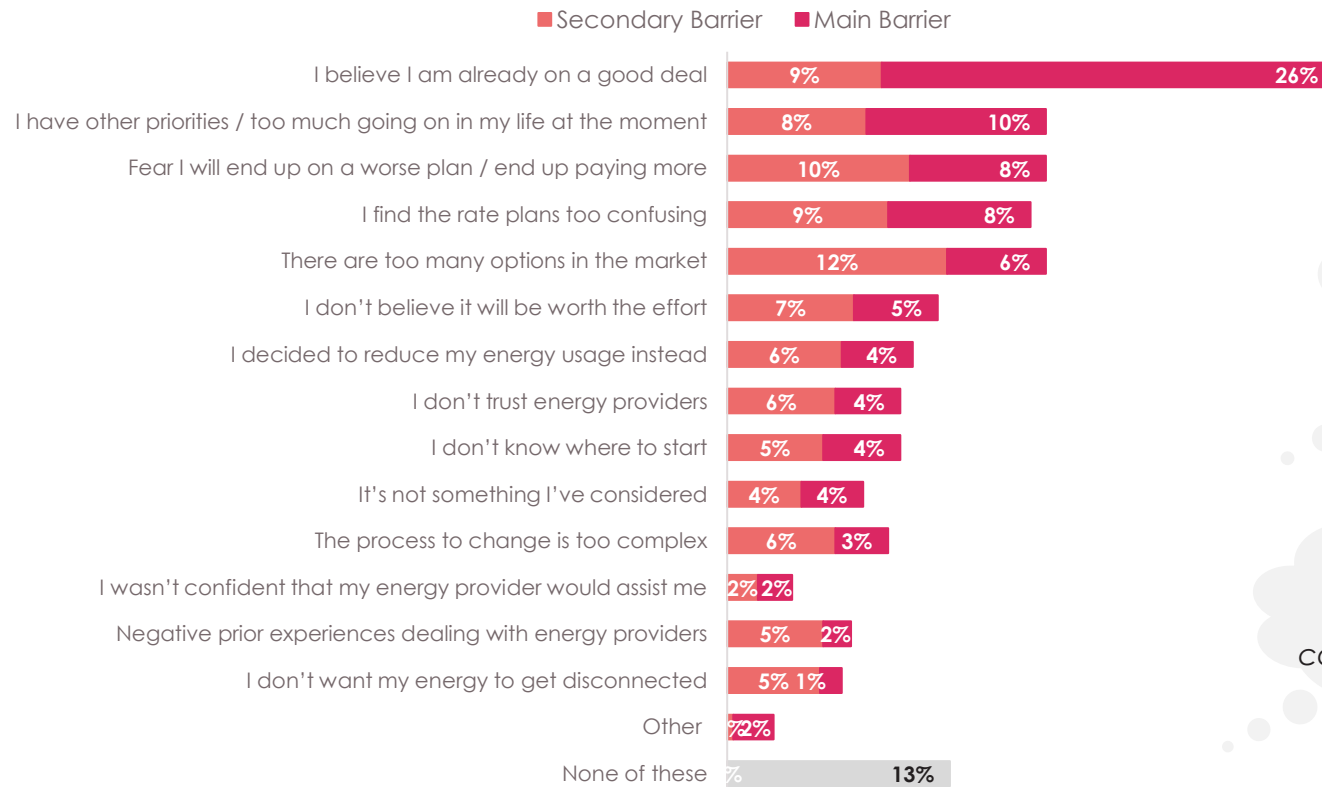
Positively, once aware of the Vic Compare website, this provides an effective starting point for consumers.

"It's too hard to understand the rates, I don't have the knowledge to overcome it. It's a tactic to make it so complex. I find it intimidating and I don't even know who to lean on for the best advice, it's easier to do nothing sometimes."

- Under 30s

Concerns about ending up on a worse plan, conflicting priorities and confusion stands in the way of Victorians reviewing more frequently

Barriers to Reviewing Energy Provider



"Not a priority for our household." - **Victorian**

"I am quite happy with the current supplier and do not believe that there are any better options." - **Victorian**

"Too busy, constantly slipping my mind." - **I live alone**

"Just can't be bothered, time consuming." - **Victorian**

"I believe that currently I am on the cheapest energy plans - I have recently reviewed my plans and don't intend to renew them in the next 12 months." - **Victorian**

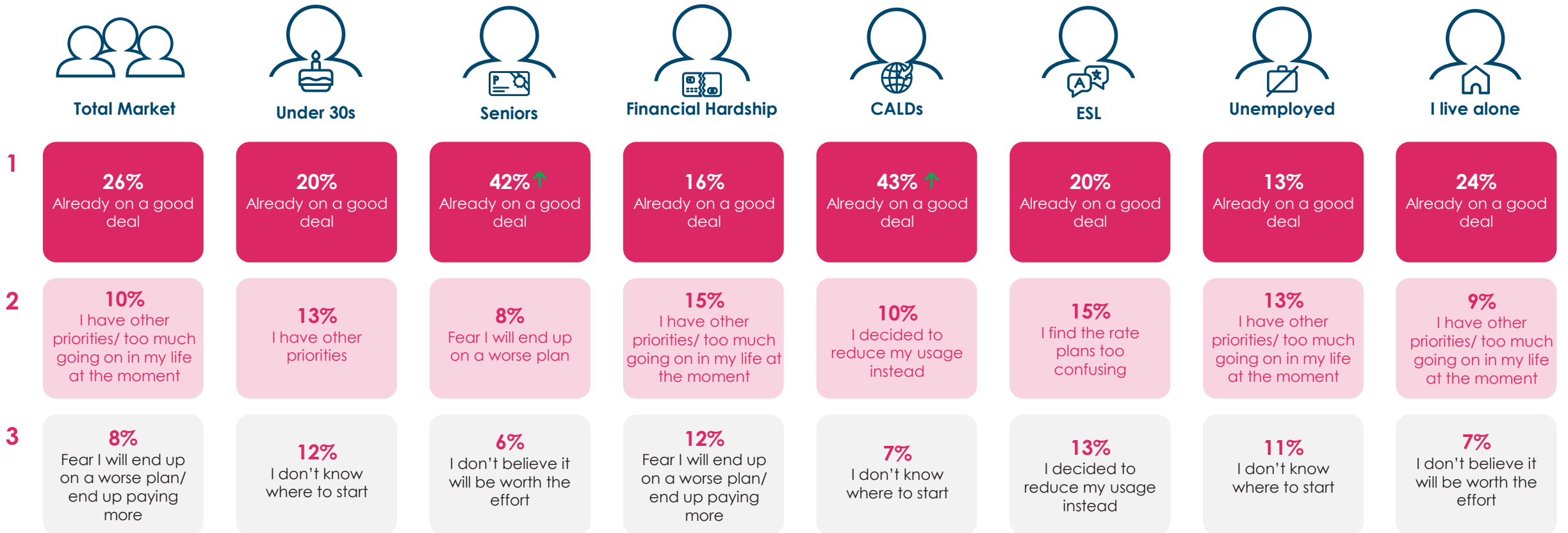
B5. Are any of the following preventing you from reviewing your energy provider and rate plan more often? Please select all that apply. B6. Which of these is the biggest barrier preventing you from reviewing your energy provider and rate plan more often? - Selected Choice. Total sample n=571 B3. Why don't you intend to review your energy provider and rate plan in the next 12 months?

Significantly higher / lower at 95% confidence



At-risk groups such as Seniors and CALDs are more likely to believe that they are already on a good deal, thereby not reviewing their plan

Top 3 Barriers to Review x At-Risk Group



B6. Which of these is the biggest barrier preventing you from reviewing your energy provider and rate plan more often? - Selected Choice. Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence



The risk to benefit ratio has consumers opting to stay where they are, believing there to only be small incremental savings to be made

To motivate consumers to proactively review their energy plan, the risk to benefit ratio needs to improve. To do this, either the risk (or challenge) of switching needs to be reduced, or the extent of benefits need to be better communicated.

I believe I am already on a good deal

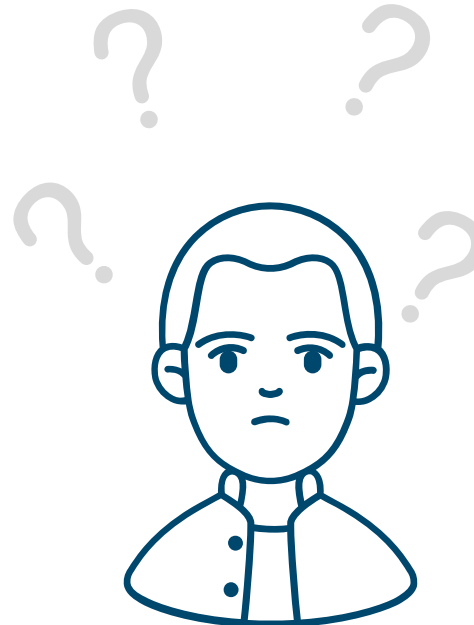
Many consumers mistakenly believe that because they were on a good plan when they first signed up, they remain on a good plan. This 'set and forget' mindset has consumers believing it unnecessary to review, as they have no awareness of the potential benefits.

"I wouldn't have a clue what would make me review. I don't think anything out there is as good as what I am on now, so why would I?" – Senior

Fear I will end up on a worse plan / end up paying more

Due to the perceived complexity of energy plans, there is a fear that consumers will find themselves on a worse plan than before. This mindset prevents consumers from looking for a better deal, as the risk is viewed as greater than the potential reward. (Further validated in CSIRO research).

"Fear of choosing the wrong one and getting ripped off from a strange unknown brand that I have never heard of before." - Living alone



I have other priorities / too much going on in my life at the moment

There are many larger household expenses that are seen as more important to actively manage than energy bills. With limited perceived savings to be had and high perceived complexity, consumers mention they would rather spend the time doing activities they enjoy.

"Doing the comparison means that I have to take time away from things I loved doing like spending time with my friends and family or doing other activities." – CALD

I don't believe it will be worth the effort

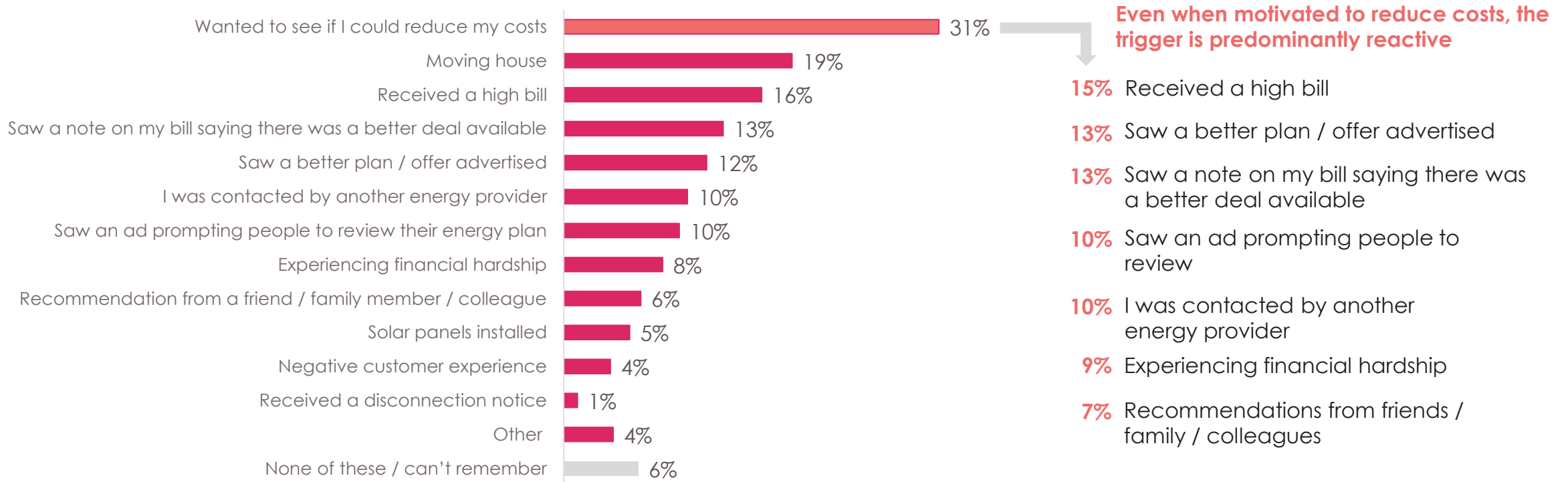
Most consumers did not feel the effort to take action would result in a high enough dollar value to make the review process worthwhile. Most assume there are minimal savings to be gained, rather than hundreds of dollars per year.

"It's not going to be an enjoyable experience and for the \$10 I may save I prefer to get a glass of wine." - Living alone

"There is a mental block, so much effort to save say \$50 over 3 months I don't think it is worth it." – CALD

Victorians are largely reactive, prompted to review when moving, after receiving a high bill, seeing an ad or a better offer on their bill

Reasons to Review- Reviewed within the last 2 years



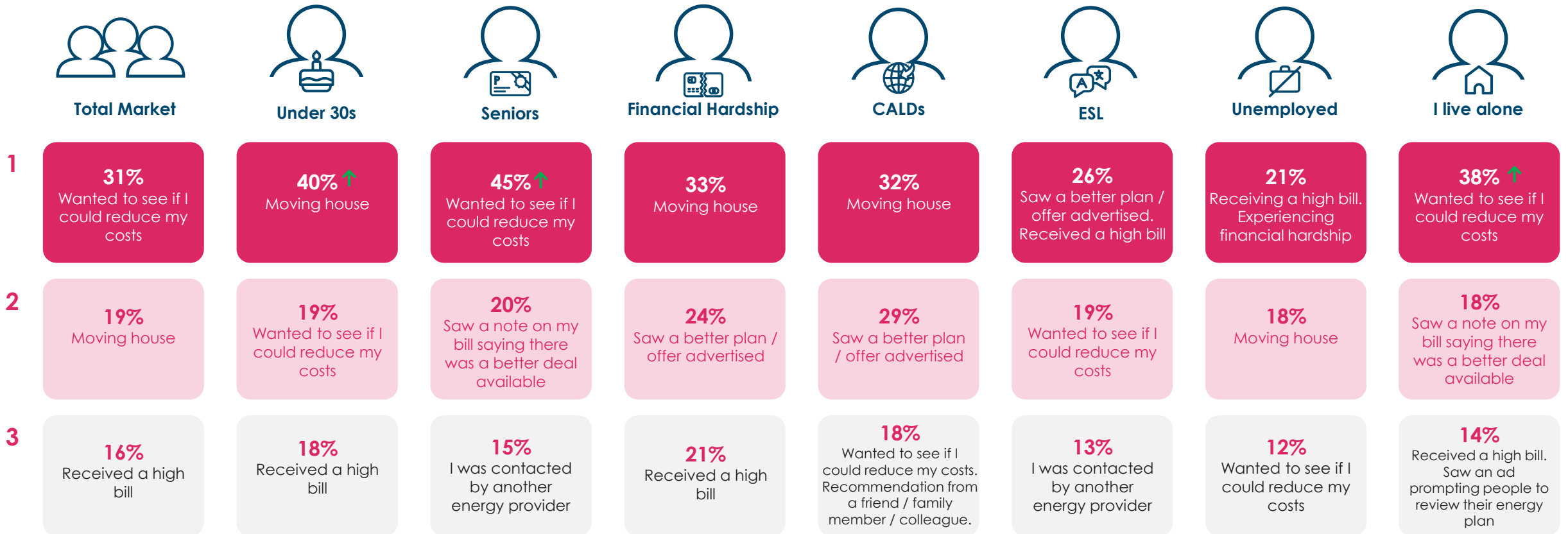
B13. You mentioned you last reviewed your energy provider [TIME PERIOD]. On this occasion, what made you decide to review? Please select any that apply. B1. When did you last review your energy provider and rate plan? Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence



Under 30's are more likely to review after moving house, whereas Seniors and Living Alone want to see if they can reduce their rates

Top 3 Reasons to review in the last 2 years x At Risk Group



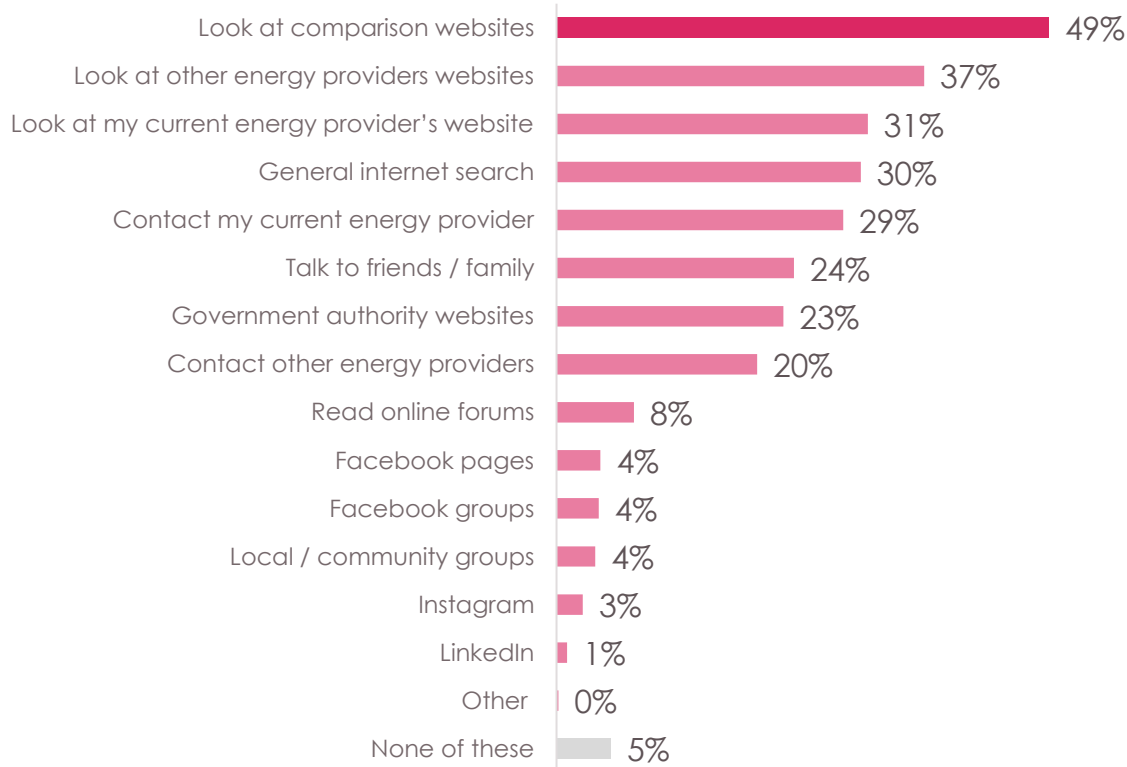
B13. You mentioned you last reviewed your energy provider [TIME PERIOD]. On this occasion, what made you decide to review? Please select any that apply. B1. When did you last review your energy provider and rate plan? Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence

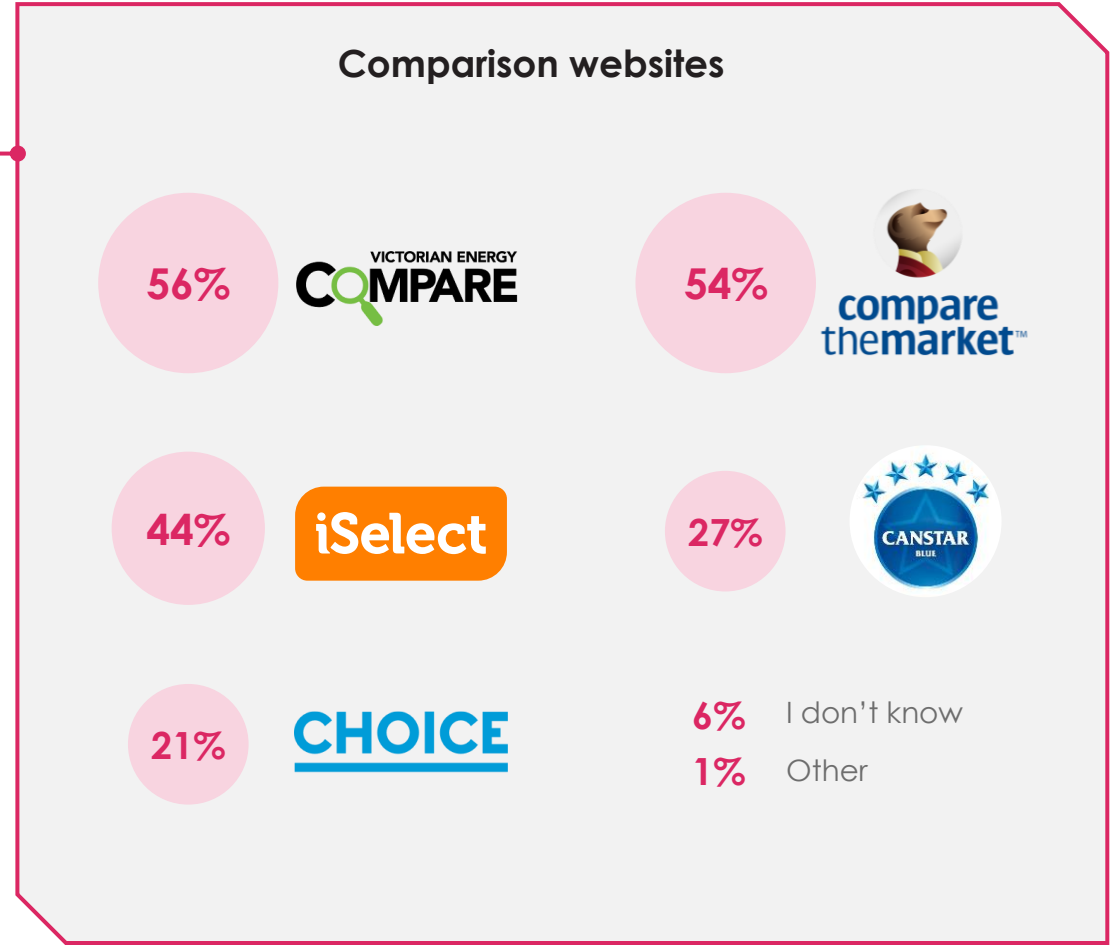


Comparison websites are a key source of information, with many already looking to the Victoria Energy Compare website

Sources of Information – Channels



Comparison websites



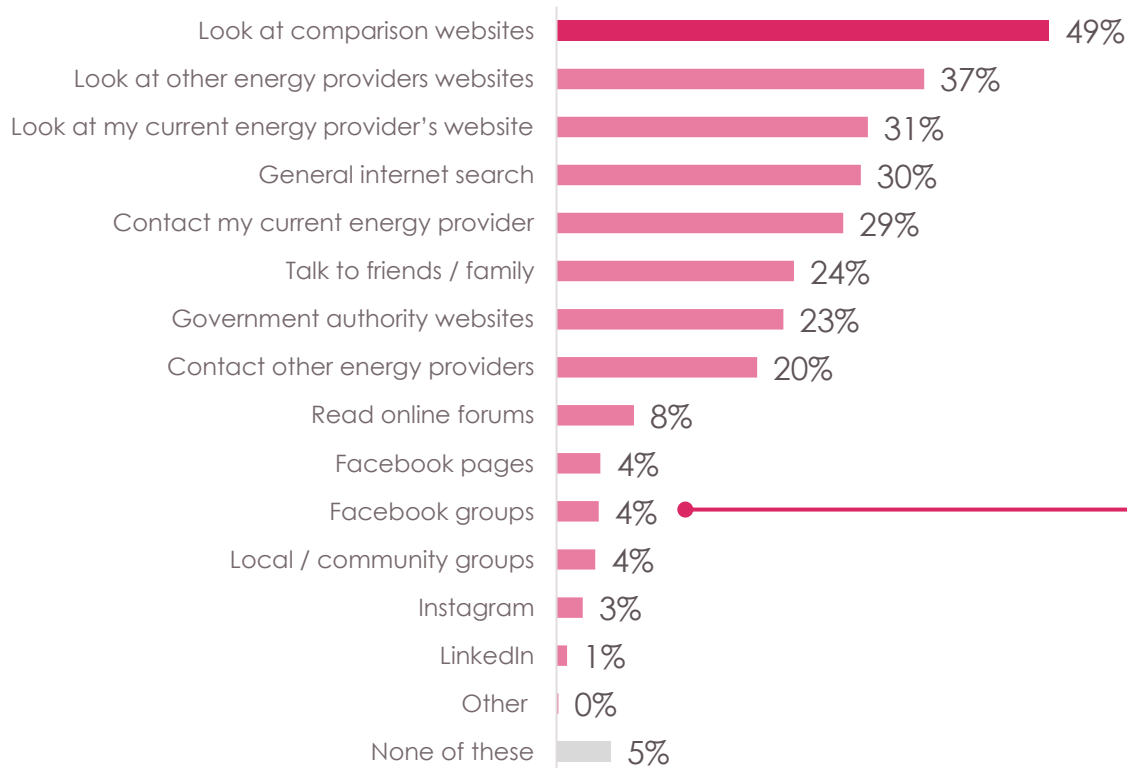
B9. If you were going to review your energy provider or rate plan, which of these would you go to for information? Please select all that apply. Total sample n=571 B11. You mentioned you would look at comparison websites as a source of information. Which comparison websites would you go to? Please select from the list below. Base n=280

Significantly higher / lower at 95% confidence



Although Facebook groups and community groups are less frequented channels, they are often a trusted source of information amongst members

Sources of Information – Channels



"Compare websites have ads in between which can be confusing. I get info from local community groups (buy, swap, sell) and through Facebook news." - **under 30s**

"I am a member of a few local community groups, including the Coburg History Society. It would be a good place to promote energy deals, as people like me would pay attention." - **Senior**

Facebook Groups

- 'Centrelink Living'
- 'AGL'
- 'Energy Plan Review Group'
- 'Buy Swap and Sell'
- 'Local area groups'
- 'Barefoot Page'
- Mum groups e.g. 'Melbourne mums'
- 'Melbourne/ Ballarat Gal Pals'
- 'Gal Problems Group' and other 'friend' groups

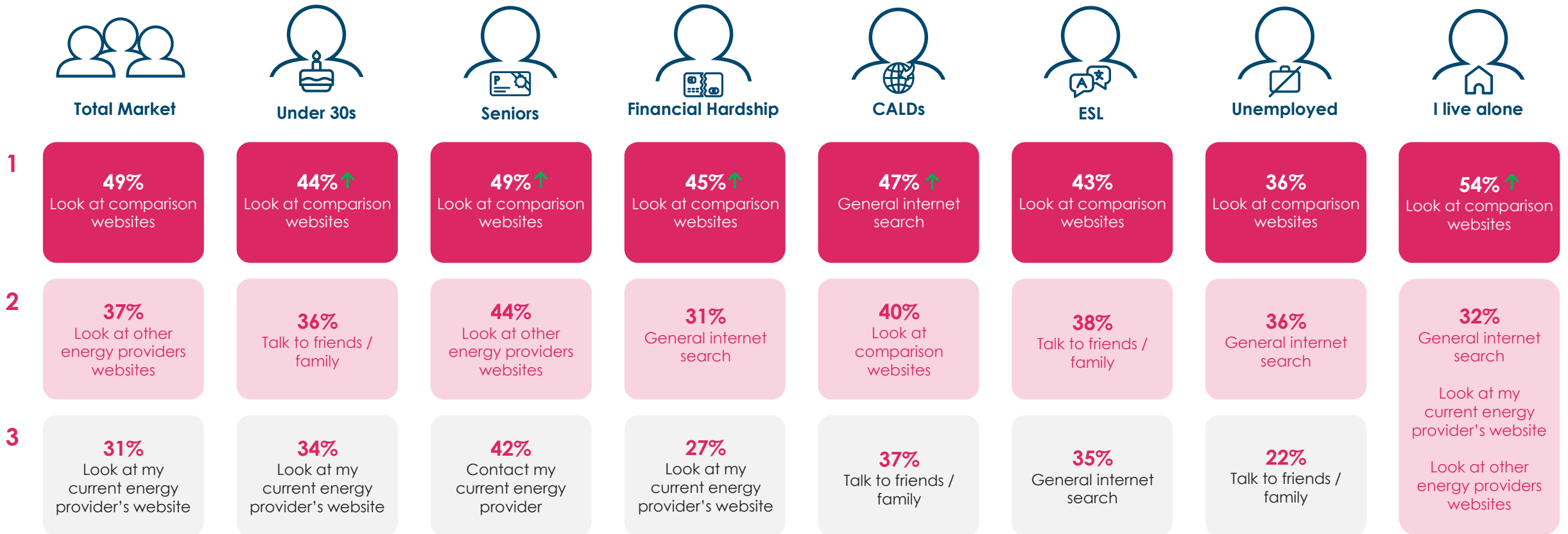
B9. If you were going to review your energy provider or rate plan, which of these would you go to for information? Please select all that apply. Total sample n=571 B10. You mentioned you would turn to Facebook Groups as a source of information. Which groups would you turn to? Please type in any that apply. Base n=26

Significantly higher / lower at 95% confidence



Comparison sites are the most used source across at-risk groups. CALD are also likely to turn to general online search

Top 3 Sources of Information



B9. If you were going to review your energy provider or rate plan, which of these would you go to for information? Please select all that apply. Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significantly higher / lower at 95% confidence

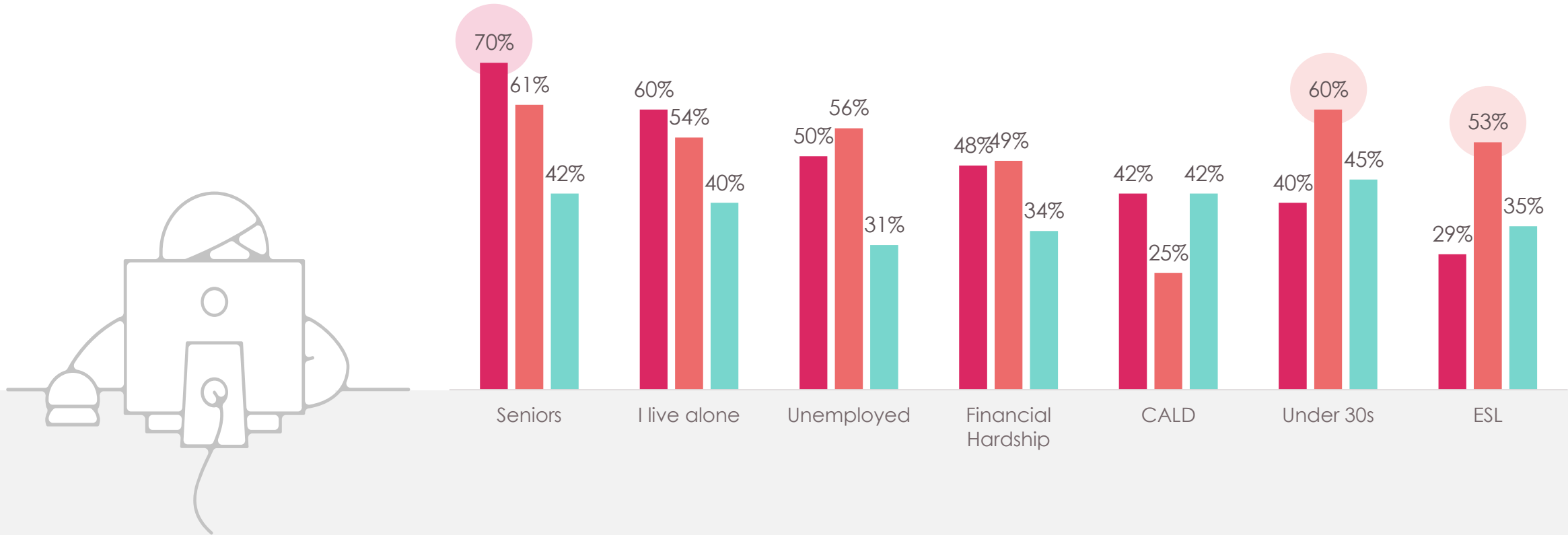


OFFICIAL

Seniors are the most likely to use Vic Energy Compare. Under 30s and ESL are more likely to turn to commercial comparison websites

Top 3 Comparison Websites X At Risk Groups

■ Victoria Energy Compare ■ Compare the Market ■ iSelect



B11. You mentioned you would look at comparison websites as a source of information. Which comparison websites would you go to? Please select from the list below. Base n=280; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significant difference at 95% confidence

HONEYCOMB

Consumer Rights



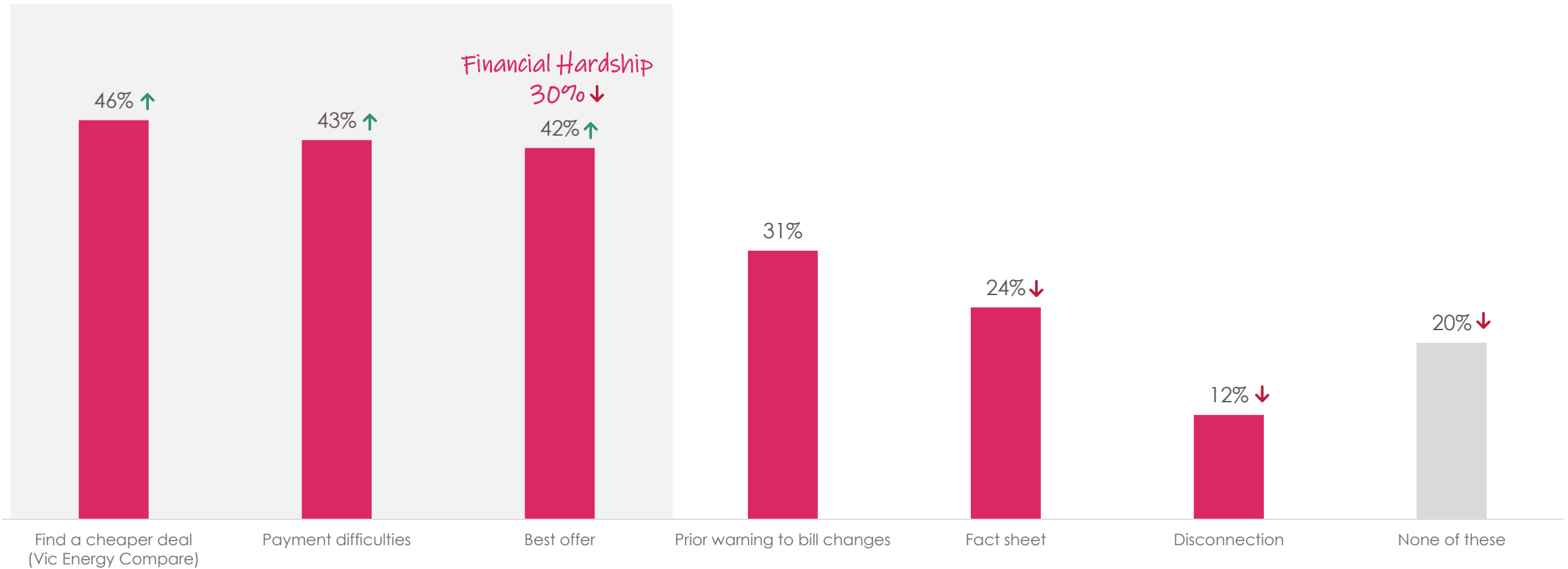
Vic Energy Compare, Payment Difficulties and Best offer have the highest awareness, however many have still not heard of these rights

- Once aware, these rights deliver a sense of empowerment, increasing likelihood to engage
- Awareness of these rights make consumers most likely to check their bill to see if they are on the best plan, and to visit Vic Energy Compare
- Communications about the extent of real savings and clarity on where to go to get help (Vic Energy Compare) are the most compelling messages
- Further support in understanding energy jargon, proactively communicating who is offering the best rates and continuous reminders are suggested by consumers as further support opportunities



Vic Energy Compare, Payment Difficulty and Best Offer have the highest awareness, however many have still not heard of these rights

Awareness of Individual Rights



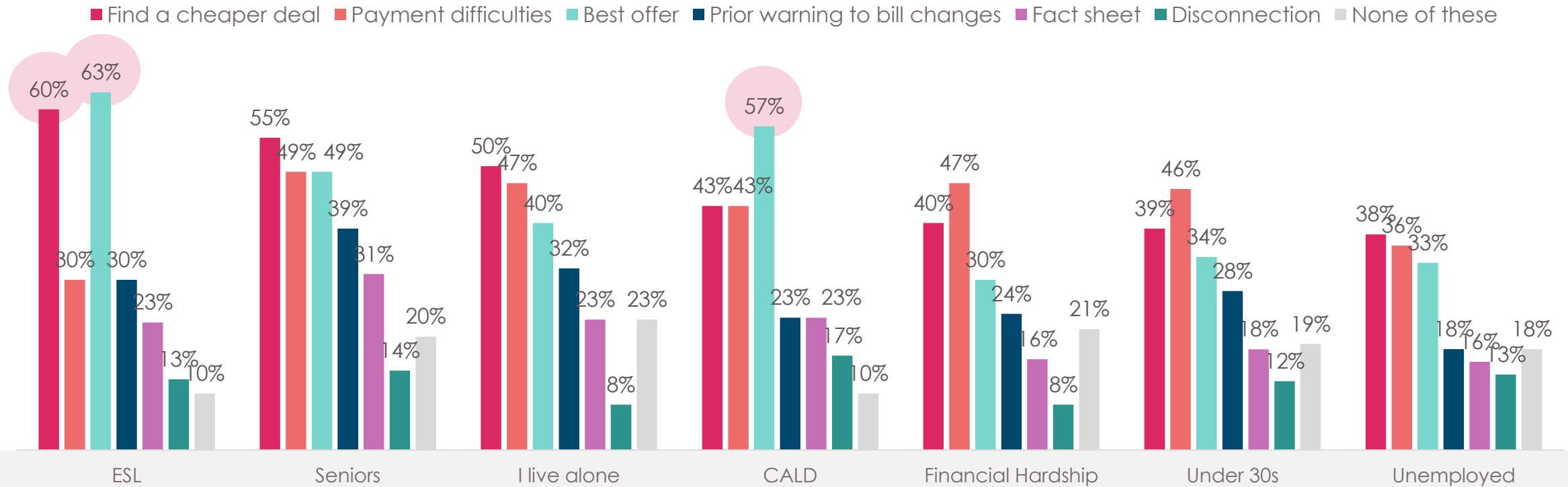
C2. Below are a list of rights and protections that the Victorian Government has put in place to support energy customers. Which of the following have you heard of before? Please select all that apply. Total sample n=571

Significantly higher / lower at 95% confidence



Awareness of rights vary significantly across At-risk groups. 'Prior warning', 'fact sheet' and 'disconnection' are low across all groups

Awareness of Individual Rights x At Risk Groups



C2. Below are a list of rights and protections that the Victorian Government has put in place to support energy customers. Which of the following have you heard of before? Please select all that apply. Total sample n=571; Unemployed n=45; Financial Hardship n=150; Seniors n=154; Under 30 n=107; ESL n=40; CALD n=30

Significant difference at 95% confidence

Low consumer awareness of energy rights is contributing to the low overall engagement with energy providers

Having increased awareness of consumer rights is the first step towards creating action and helps reduce the perceived risks

BEST OFFER

The reason for this lack of awareness is due to consumers missing the comms on their bills. This is partly due to not being aware of their rights and partly due to the location of the messaging (usually in fine print on the back of consumer's bill). Once they are informed about the Best Offer, consumers find the information to be both helpful and desirable knowledge to have.

PRIOR WARNING

There is no awareness of prior warning to bill changes, but there is consensus that five days warning is inadequate, a more reasonable time period being one month.

FACT SHEET:

There is no awareness of the fact sheet but having an easy way to compare against rates and plans is considered extremely useful for consumers.

PAYMENT DIFFICULTIES:

There is some awareness of payment difficulties as a portion of consumers have utilised these service in the past, but it is not at the forefront of consumer's minds until it became relevant. Awareness spiked during COVID-19 due to increased comms from energy provider as a general courtesy.

"We have to ask for the best offer? They should automatically put you on best offer, not make you have to find it." – Victorian

"I didn't know about this. I was offered a better offer by Energy Australia thinking they were being nice but clearly they had to do it by law." – Under 30

"I knew there was payment plans but not of the law behind it." – Under 30

Victorians feel that knowing their rights is essential to ensuring they are on the best deal as it provides them with a sense of empowerment

When Victorians realise their rights, they become very passionate, eliciting surprise, relief, happiness and in some cases, disappointment for not having had this knowledge sooner.

It is evident that after being shown their rights consumer's energy levels increased and, for the first time many of them feel someone has their best interests at heart and are helping them navigate through the complexity. This level of passion illustrates just how important awareness of these rights are and the impact they have on the likelihood for Victorians to check their energy bills or speak with their retailer.

Upon reflection Victorians hold similar sentiments as to who is ultimately responsible for ensuring they are on the best energy deal.

What roles does each party play?

1.) The individual – Almost all consumers consider themselves to be accountable for making sure they are on the best plan and seeking out information.

2.) Government bodies - play a vital role in enforcing and mandating regulations and ensuring consumers are not taken advantage of.

3.) The retailer - needs to play a role in ensuring they are honest and transparent. However, it is understood that they are a private business in a very competitive market.

"It must be in such small print; they must do it so small so you cannot see it." OMG, here it is here [looks at her bill] I have never seen that, I just put it in the draw once I've paid it. It has the government website! I should use this site. You have been very helpful to me." – Senior

"It makes me feel hopeful and feels like maybe the government is stepping in and making them pick up their game. Making things more transparent." – Works part-time

The qualitative sessions provide an insight into how effective awareness of their rights can be on influencing consumer's behaviour

Prior to becoming aware of their rights, the risk to benefit ratio resulted in participants opting to remain disengaged. Once made aware of their rights, the risks to act are greatly reduced.

The likelihood for participants to take further action was based on a combination of:

- 1.) Participating in the qualitative research;
- 2.) Becoming aware of consumer energy rights; and
- 3.) Reviewing the Victorian Energy Compare website.

These three factors provided participants with a sense of empowerment and enough motivation to review their current energy provider or do further research.

The compare website and 'It's your energy' both received positive remarks and in making these sources and information more readily available to participants, especially the 'at-risk' segment, it would provide a positive trigger to reengage with their energy retailer and the sector more broadly.

Most participants requested to be sent the link to the Vic Energy compare website at the close of the research in order to commence the process.

"30 minutes into this discussion I felt like I should go and review my provider. Now that I know there is a government website where I can go and compare these things I would go and do it. I would be really thankful if you could send me these websites." – CALD

"I would now have a look at it and see how my plan is stacking up against the rest, most definitely! You have peaked my interest now." – Senior

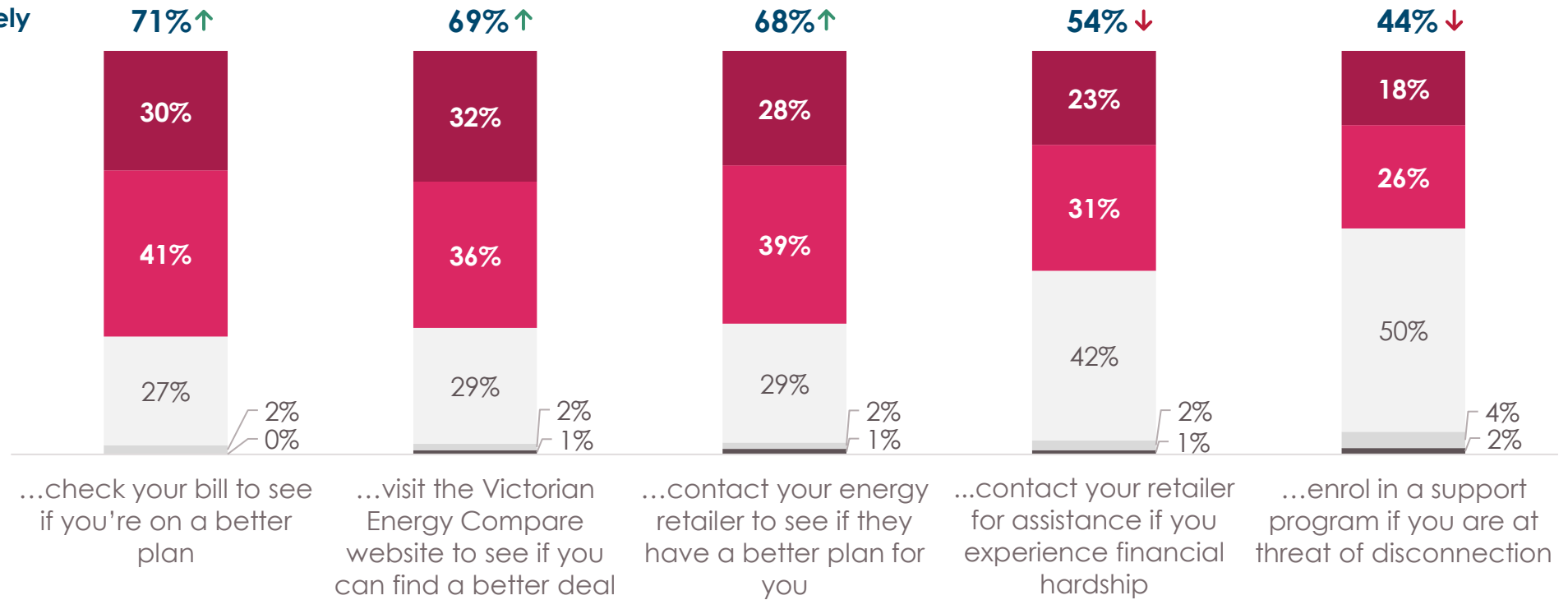
"The best part about the website is that it has .gov, this gives me a lot of trust and gives me confidence. I know that I won't be getting ripped off." – CALD

Once aware of their rights, they are highly effective in motivating Victorians to check their bills and speak to their retailer

Impact of Awareness of Rights on Likelihood to...

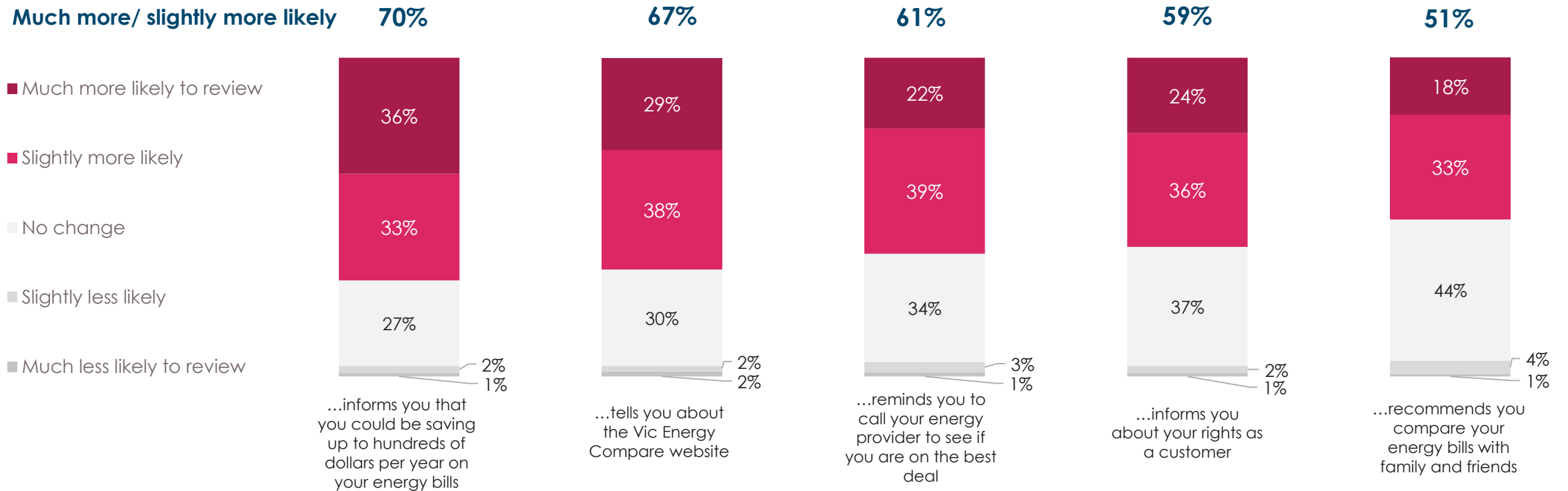
Much more/ slightly more likely

- Much more likely
- Slightly more likely
- No change
- Slightly less likely
- Much less likely



Victorians are most likely to pay attention to communication regarding real savings and the Victorian Energy Compare website

Key Advertising Messages to Prompt Review An advertising campaign that...



C6. How likely would each of the following be to prompt you to review and compare your energy bill? Total n=571

Significantly higher / lower at 95% confidence

Campaigns to bring awareness to rights and demystify the process can prompt consumers to review and compare their bills

"I know it would be open to bias (to the large providers) but perhaps an **ad campaign giving the current best deals and who is best at the moment so it takes the work out** of all the previous suggestions especially for those like me who are very busy with work and its such an after thought, that when the bills do come I barely look at them and just pay, let alone take time to review."- **Lives alone**

"...I think **reminders to compare rates and contact the provider to ensure you are on the best deal for you would be great** for peoples financial situations to get a better and cheaper offer that suits."- **Under 30, Financial Hardship**

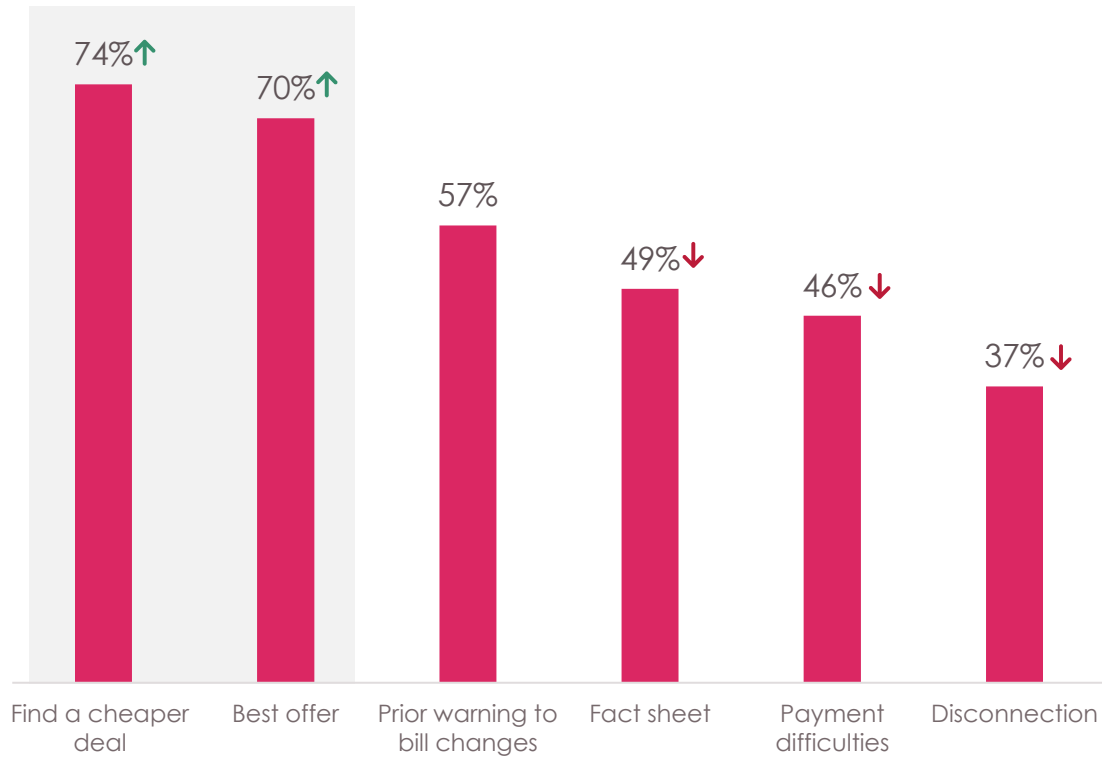
"Must **simplify the explanation about the graphs or usage illustrations** on the billings to understand the calculation of the usage."- **Victorian**

"Some **government sponsored website to provide education/tutorial on understanding the jargons** used in energy plans."- **Senior**

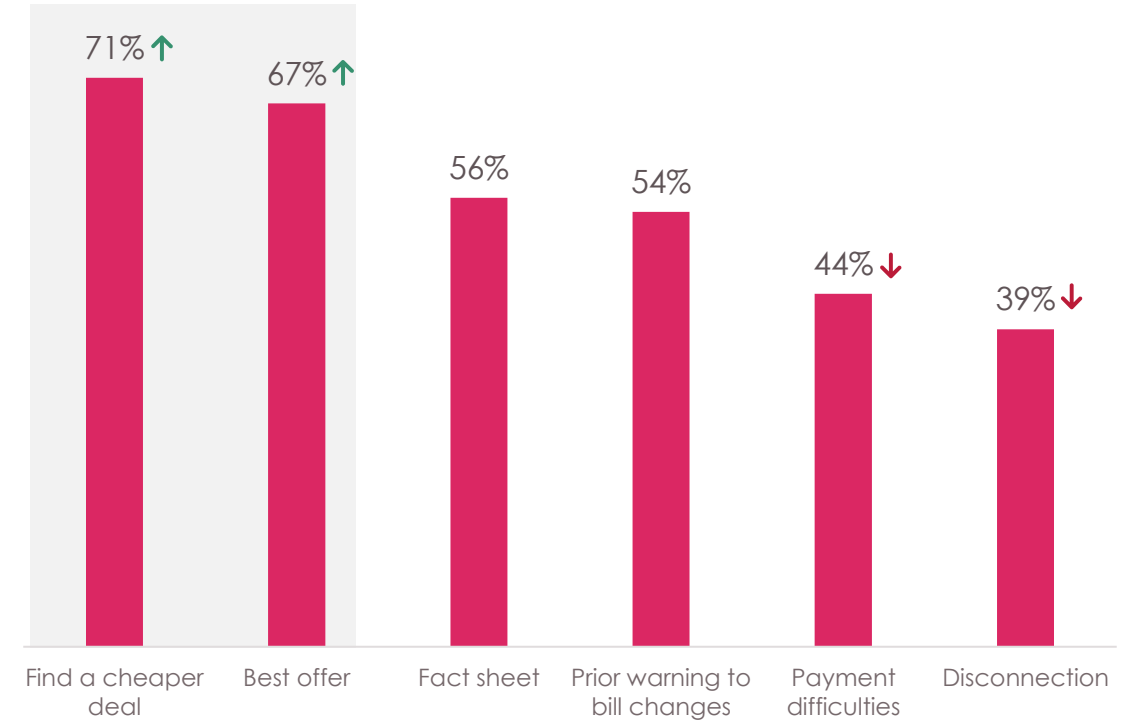
"Being **generally aware that you can be given a comparison or that you do have the opportunity to discuss rates without feeling like you are being outed** makes me feel much more confident."- **CALD**

The Vic Energy Compare website and Best Offer are the most motivating and empowering of the messages

Impact on Likelihood to Review



Impact on Confidence



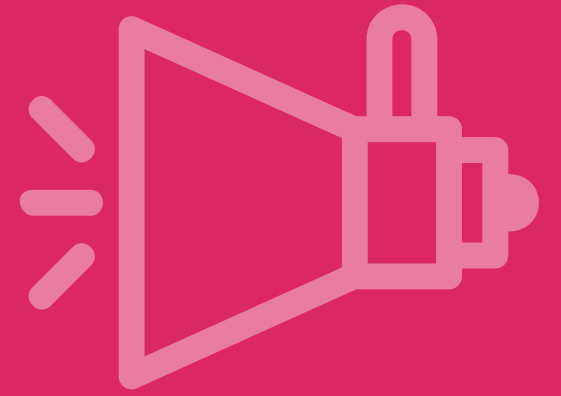
The top 3 remain consistent across all at risk groups

C3. What impact do each of these have on your likelihood to review your current energy plan? C4. What impact do each of these have on your confidence that you would be able to find the best energy deal for you? Total n=571

Significantly higher / lower at 95% confidence

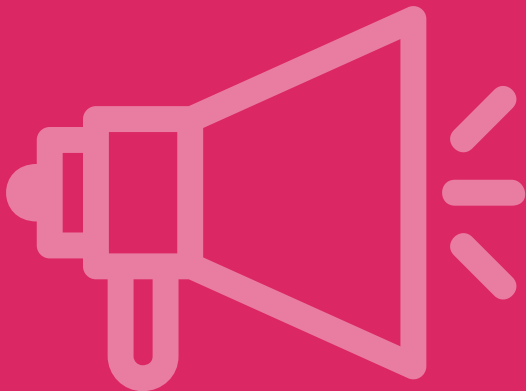


Campaign Effectiveness

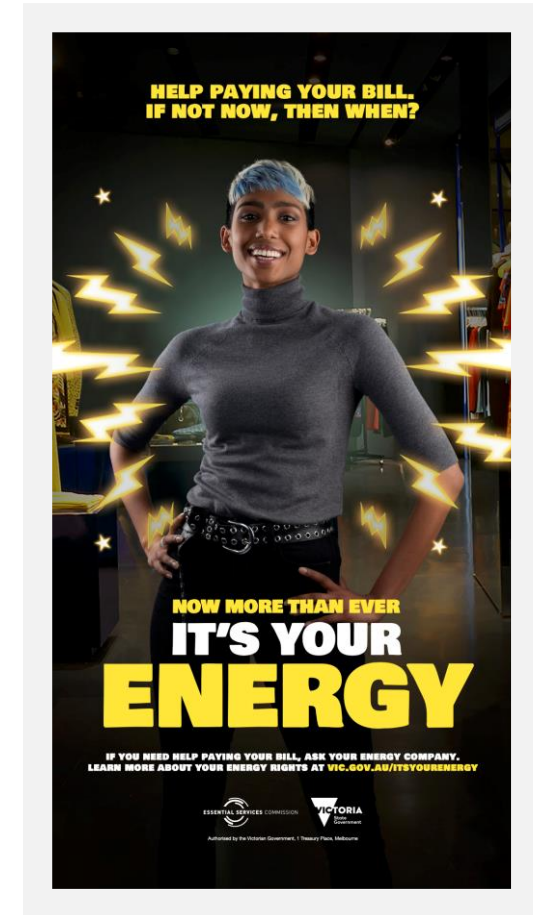
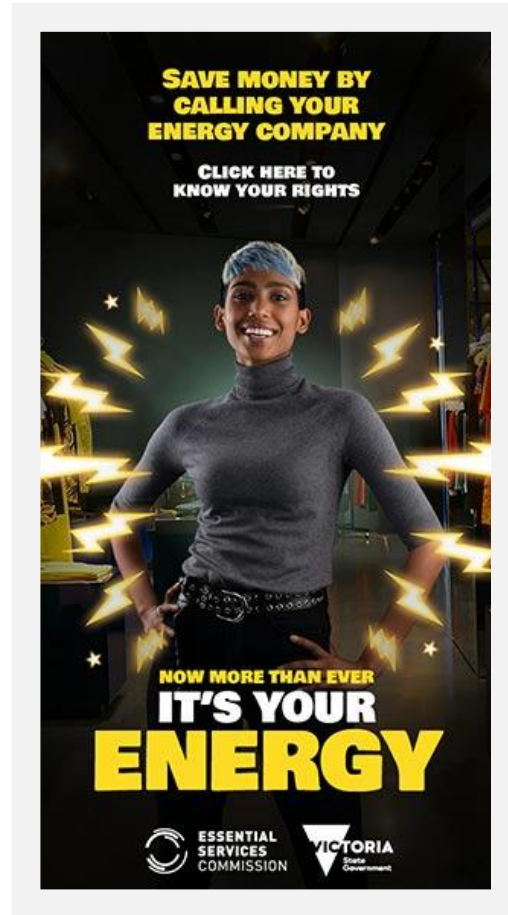


The positive and empowering messaging in the ads is liked, however they require a clear call to action

- The 'save money by calling your energy company' ad resonates best with consumers, providing the greatest clarity on what step to take next. The imagery however is polarising, with many consumers unsure of its relevance.
- The 'a better deal' and 'help paying your bill' messages lack a clear call to action, therefore resonating less strongly with consumers.
- Further optimising these ads to assist in overcoming engagement barriers and provide greater guidance on steps to take is recommended.

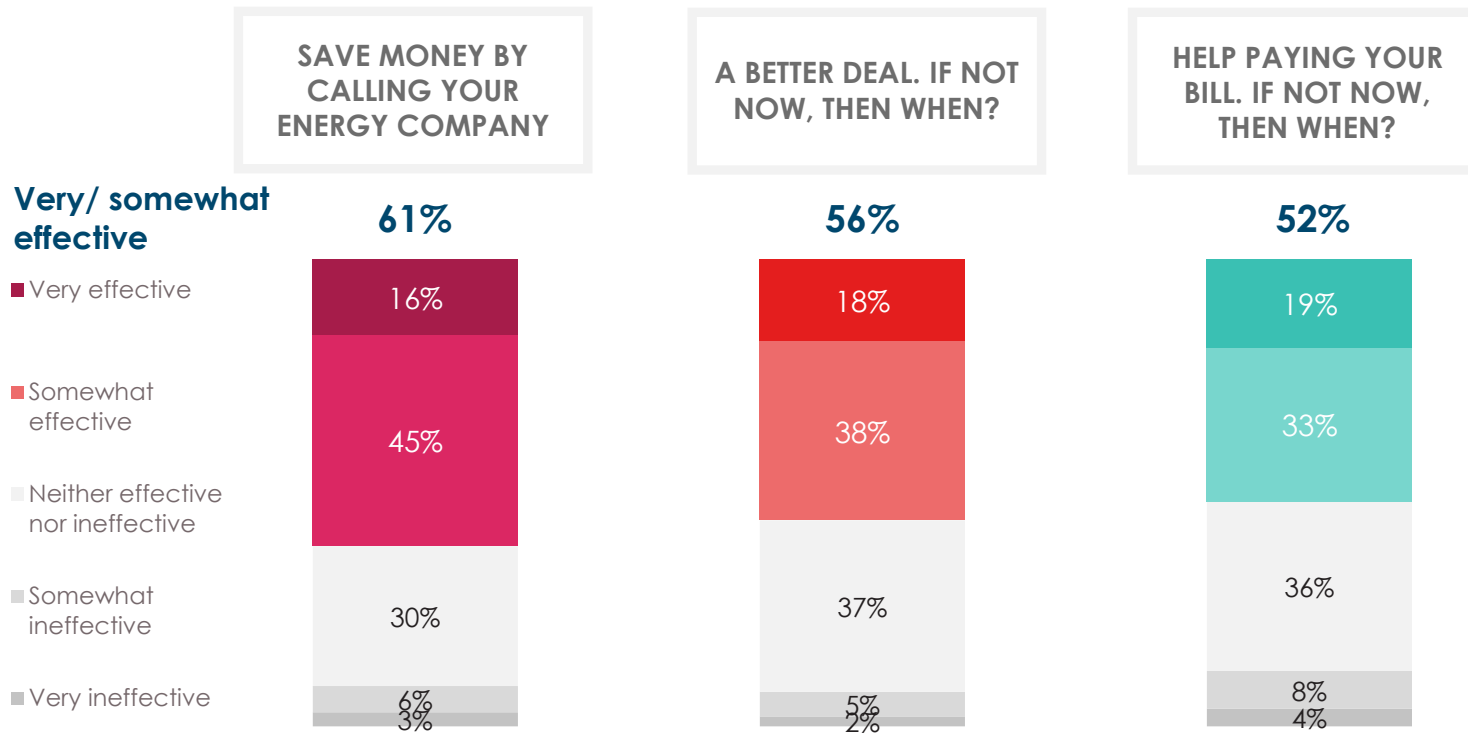


Each respondent was randomly allocated one of three ads



'Save money by calling your energy company' is the most effective of the ads in conveying rights as a Victorian Energy consumer

Campaign Effectiveness



“

“Very clear and vibrant and tells the customers what they need to know.”- **Senior (Save money by calling your energy company)**

“Grabs your attention and makes you aware what is available to check.”- **Lives alone (Save money by calling your energy company)**

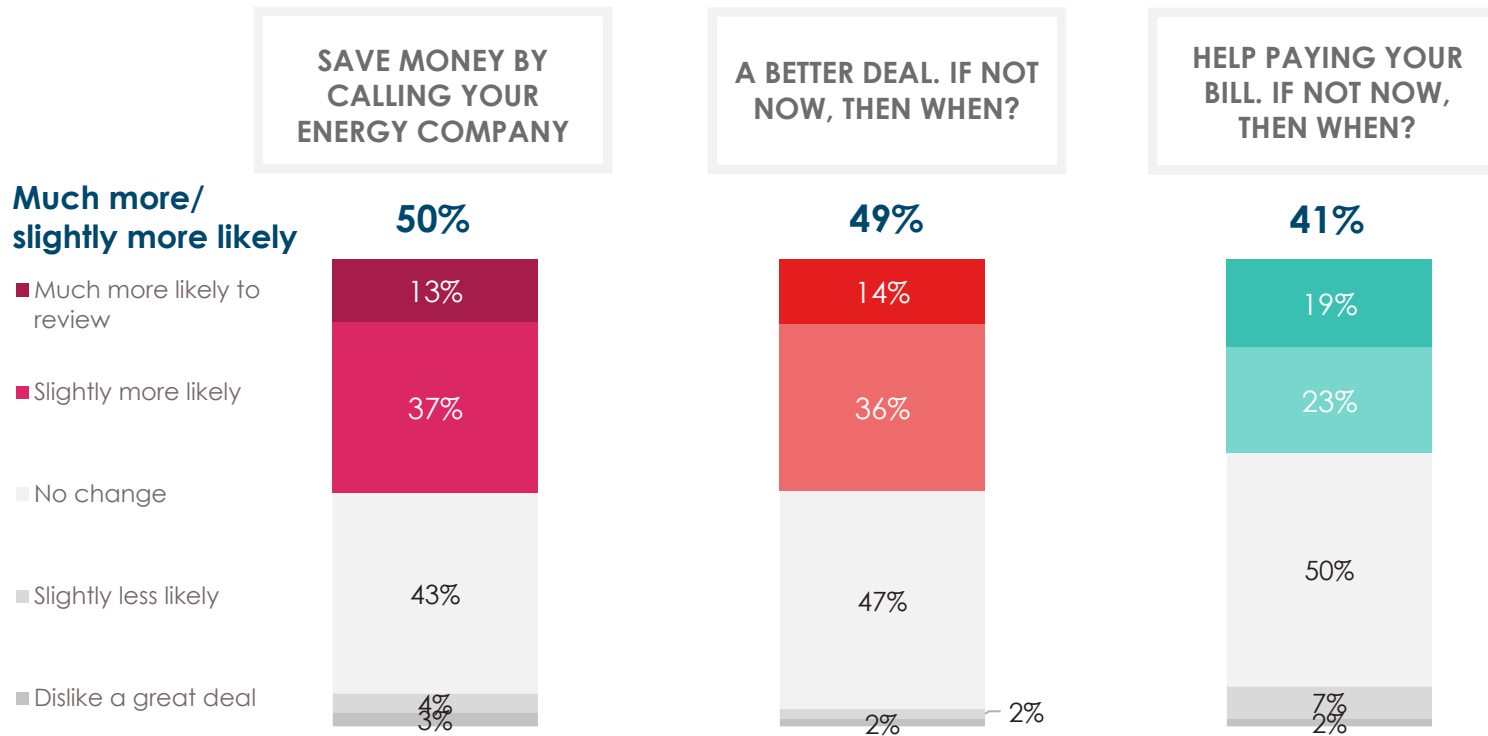
D2. How effective is this ad in helping you to better understand your rights as a Victorian energy consumer? Total sample n=571 Campaign 1. base n=197 Campaign 2. base n=186 Campaign 3. base n=188

Significantly higher / lower at 95% confidence



The Campaign 'Save money by calling your energy company' is also the most likely to motivate action

Likelihood to Take Action



“

“It is a reminder that consumers should not become complacent and just blindly accept energy bills without any process of investigation.” - Senior (Save money by calling your energy company)



The 'save money' messaging is effective in reminding consumers that reviewing their energy can save them money, however it lacks a clear call to action

Motivating

"It's just another reminder to check that You're getting the best deal - the ad does look great, though, which is what it should look like if it's to have any positive effect."- **Lives alone**

Engaging

"It's eye catching and makes you think about what you might just always pay."- **Victorian**

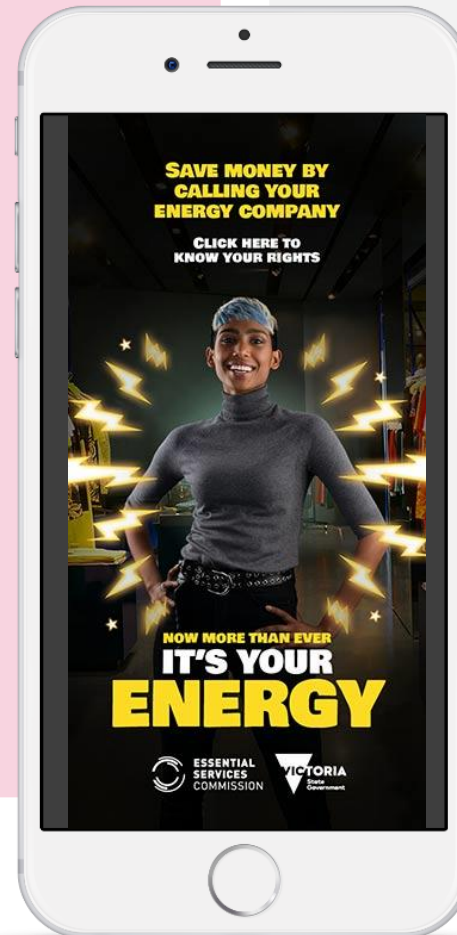
"it stands out well and grabs you with easy instructions."- **Victorian**

Credible

"Because this message comes from a government authority."- **Senior**

"It's backed by the Victorian government."- **Senior**

"It is a government run plan. There are no commercial planners involved." **Senior, lives alone**



Lacks meaningful information

"The whole ad is just a picture of someone. It doesn't give much information on what it's for and is too much like a commercial for a power provider. Just an ad with a reminder to check your energy plan with a number and web address would suffice."- **Lives alone, Financial Hardship**

"Because it doesn't tell me enough information to prompt me to want to do it."- **Financial Hardship**

Lacks relevance

"In actual fact this advert makes no impact or sense that is relevant to the message they are trying to get across..."- **Victorian**

"Total disconnect" – **Lives alone**

The 'better deal' ad clearly delivers a clear reminder to review, feeling most relevant to a younger audience

Motivating

"It is very clear and simple to understand that people need to take action now to compare their energy prices / bills."- **Lives alone**

"Because it is short and sweet. It reminds me that I always put off reviewing my plan, this campaign is the push I need to just do it (now!)."- **Financial Hardship**

"It just reminds me that I should not put off doing something as I will never actually get around to doing it."- **Victorian**

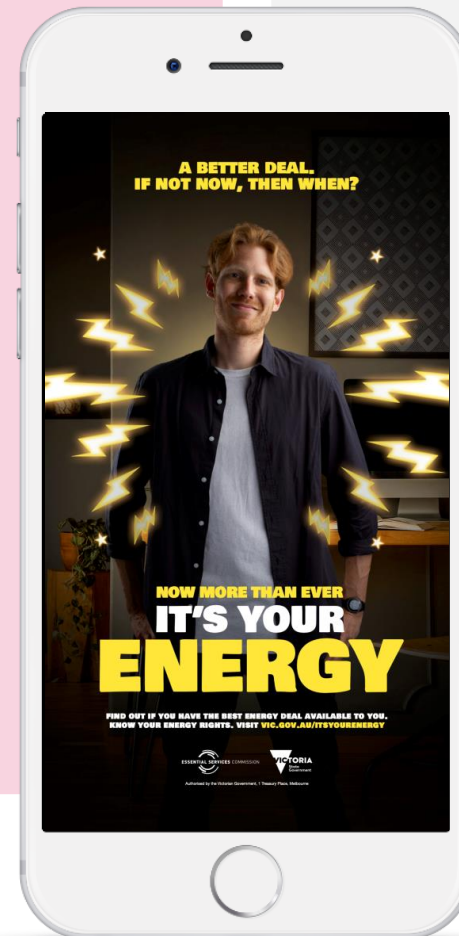
"Cause my plan is same so I never think about changes. but after this ad I think I can find better deal if I review."- **Under 30, CALD**

"It makes you question if you really are on a good plan."- **Victorian**

Engaging

"Vibrant and attractive to a young crowd."- **Under 30, Financial Hardship**

"Good effects, strong wording and persuasive text."- **Under 30**



Not appealing to all customers

"That means only young ones and new technology customers can find new deals, nothing towards elderly and non tech people to better their deals."- **Senior, Lives alone, Financial Hardship, Unemployed**

Consumers like feeling in control and the positivity of the ad but lack clear direction on what steps to take. The imagery is also polarising

Empowering

"Because it gives the feel that it puts the power back on us and that we are able to be under control."- **Under 30, Financial Hardship**

"Because I have more control of my account."- **Victorian**

"It gave me a good feeling that I can save."- **Victorian**

Positive

"It's inviting and catches your attention to read the ad." - **Financial Hardship**

"It's a positive advertisement and I would consider it."- **Victorian**

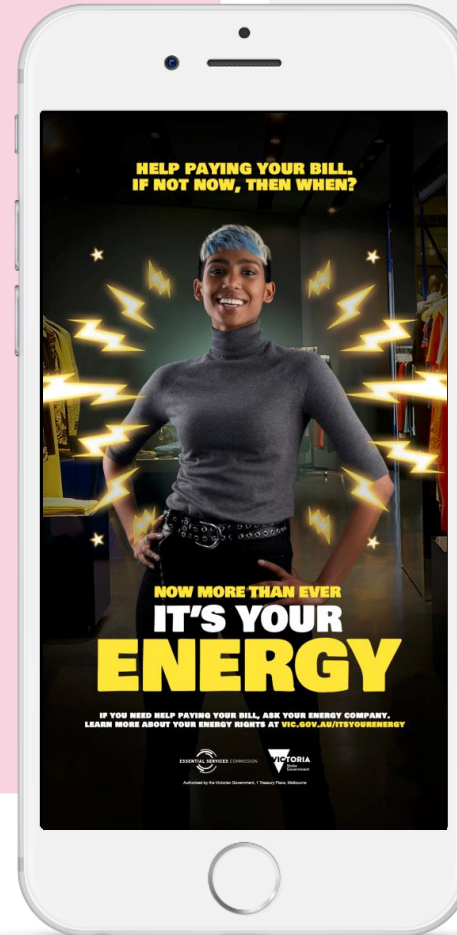
"It seems a genuine ad that wants to alert you to find the best energy provider."- **Senior**

Motivating

"Because it draws attention to the ability to gain assistance."- **Financial Hardship, Unemployed**

"Because it states that payment can be assisted or facilitated by reviewing the energy plan that is currently used."- **CALD**

"It has that positivity that really gives you support to review your energy plan."- **Financial Hardship**



Lacks clear call to action

"It tells you nothing; where to go to review and what all the different companies and plans are costing you is not shown." - **Senior**

"It didn't really give me any information."- **Victorian**

Disconnect between image and message

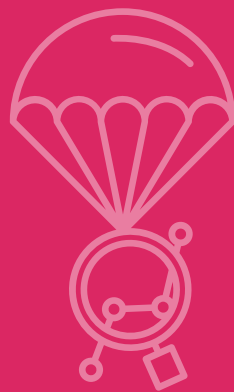
"I didn't understand the message, was more so looking at the image."- **CALD**

"It's just weird, wouldn't even think of an energy plan."- **CALD**

"Electrical shock isn't funny"- **Financial Hardship**

Thank You

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