

UNDERSTAND

F J O R D
T R E N D S

2 0 2 1

UTILITIES PERSPECTIVE

REFINE

Accenture Interactive

EVALUATE

EXPLORE

FOR UTILITIES, THE 2021 TRENDS CREATE THE SPACE
TO START A NEW CONVERSATION.

E

verything brands know about customers, their behaviors and values, has fallen away. This shake-up of the status quo means a new opportunity for utilities.

It's the space they have looked for. The space to reposition from commodity provider to innovative collaborator; from transactional biller to engaged contributor to people's lives; and from business to business (B2B) electricity provider to trusted partner in the energy transition.

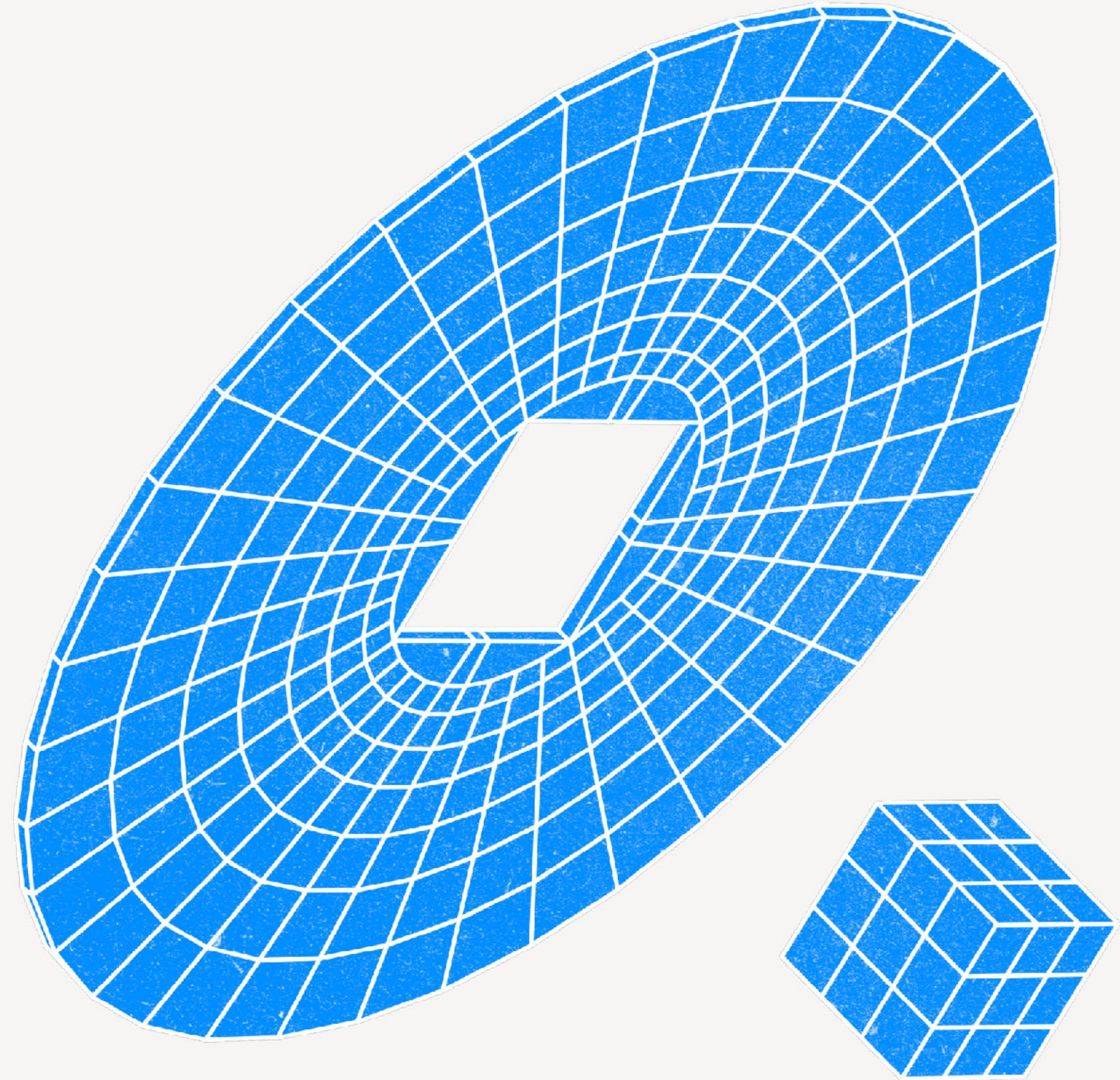
And the conditions may just be right, with customers newly receptive to utilities' innovations as they upgrade their energy lifestyles at home, and utilities poised to redefine how they provide services. Meanwhile, the energy transition is more pressing than ever for businesses everywhere.

It all adds up to a new conversation-starter for utilities and a releveling of the playing field that plays to their strengths.

We think five of the trends are particularly relevant for utilities. Here's why and how utilities can capitalize on them.

Trend 1

**C O L L
E C T I V E
D I S P L A C E
M E N T**

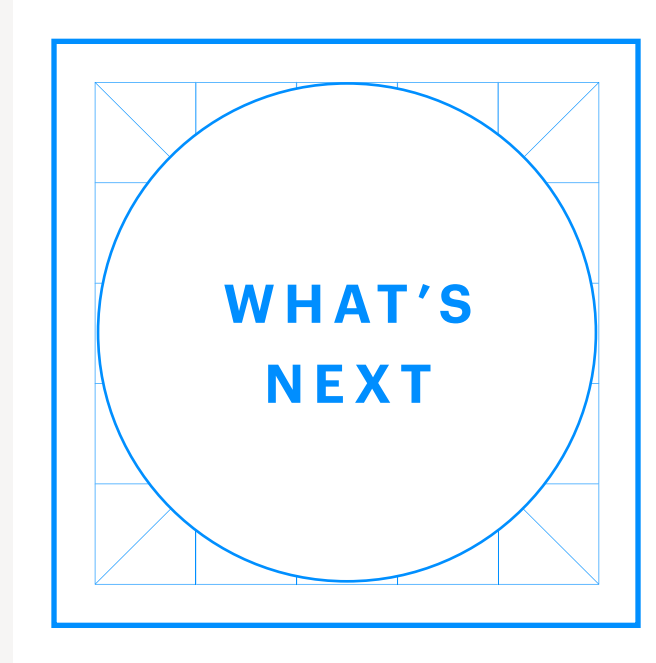




I N T R O D U C T I O N

In 2020, the world moved. Magicians became virtual party hosts, medicine happened over Zoom, and Michelin-starred restaurants started delivering! And home became the new storefront. It's made us collectively rethink everything and move past assumptions and long-held norms about what businesses are, the channels we use and how we communicate. It all adds up to a new openness and space for brands and industries to redefine themselves.





For utilities, it's the space they have looked for: to reinvent how they operate and to design a customer relationship that goes beyond billing. In years past, people just didn't "get" utilities as an engaged partner. Now that the status quo has been shaken up so much, they just might.

Displacement creates a new opportunity for utilities to move: from basic commodity provider to innovative EV charging partner; from transactional biller to engaged contributor to people's lives; and from B2B electricity provider to trusted partner in the energy transition.



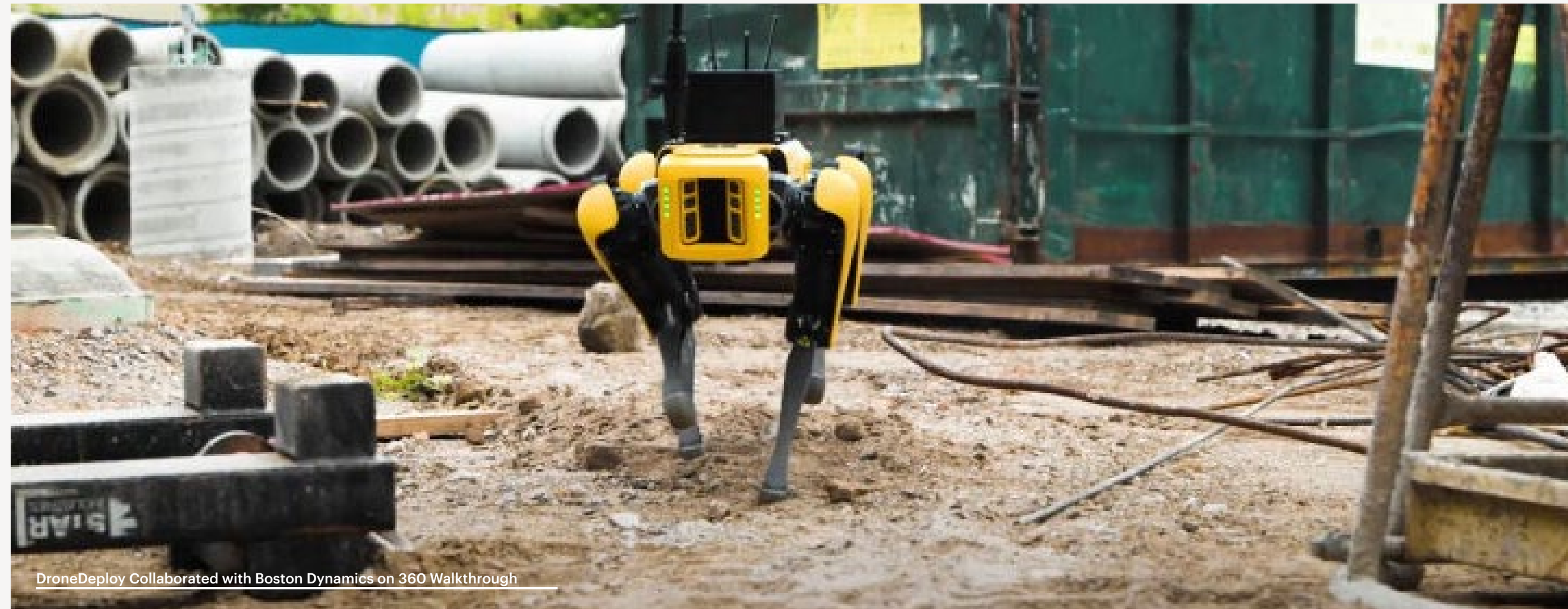
And channels will matter more than ever, with a huge opportunity for utilities to redesign how they interact with customers and businesses, online, by video or in entirely new ways—with customers now more willing to try immersive technologies.

Meanwhile, operational norms will also need to change, with so many of us working and learning from home, residential daytime outages for routine maintenance have increasingly become a thing of the past. Residential consumption patterns will change (with home comfort the new priority) and rates modeled on old lifestyles will have to flex as utilities update their assumptions.



A re-leveling of the playing field for utilities?

Many big brands had (until 2020) relied on people bumping into them as they go about their business—advertising in the street, on buses and in storefronts, for instance. But what happens when foot traffic drops overnight? For utilities, it may relevel the playing field.



DroneDeploy Collaborated with Boston Dynamics on 360 Walkthrough

Why? Because in general, utilities haven't been visible advertisers. And now they're on a par with those high-profile brands whose advertising is not being seen anymore. Who can stand out now?

This disrupted dynamic creates a window for utilities to recast their relationship with customers. Utilities can build brand recognition through strong product and service experiences (think of EV charging ecosystems), instead of following the old paths of traditional advertising. And it may give utilities the upper hand.

Drone Deploy is a cloud software company that uses drone technology to help various industries, including agriculture, construction and oil and gas. Drone Deploy has created a new 3D Walkthrough system, which combines both drone images and ground images to create an accurate picture of what a site looks like, with accuracy down to one inch.

Drone Deploy's CEO Mike Winn spoke about the new system. "Our customers are also looking to get data from the interiors, and they're looking for one digital twin, one digital reconstruction of their entire site to understand what's going on to share across their company with the safety team and with executives that this is the status of the job site today."

Source: <https://www.trendhunter.com/trends/360-walkthrough>

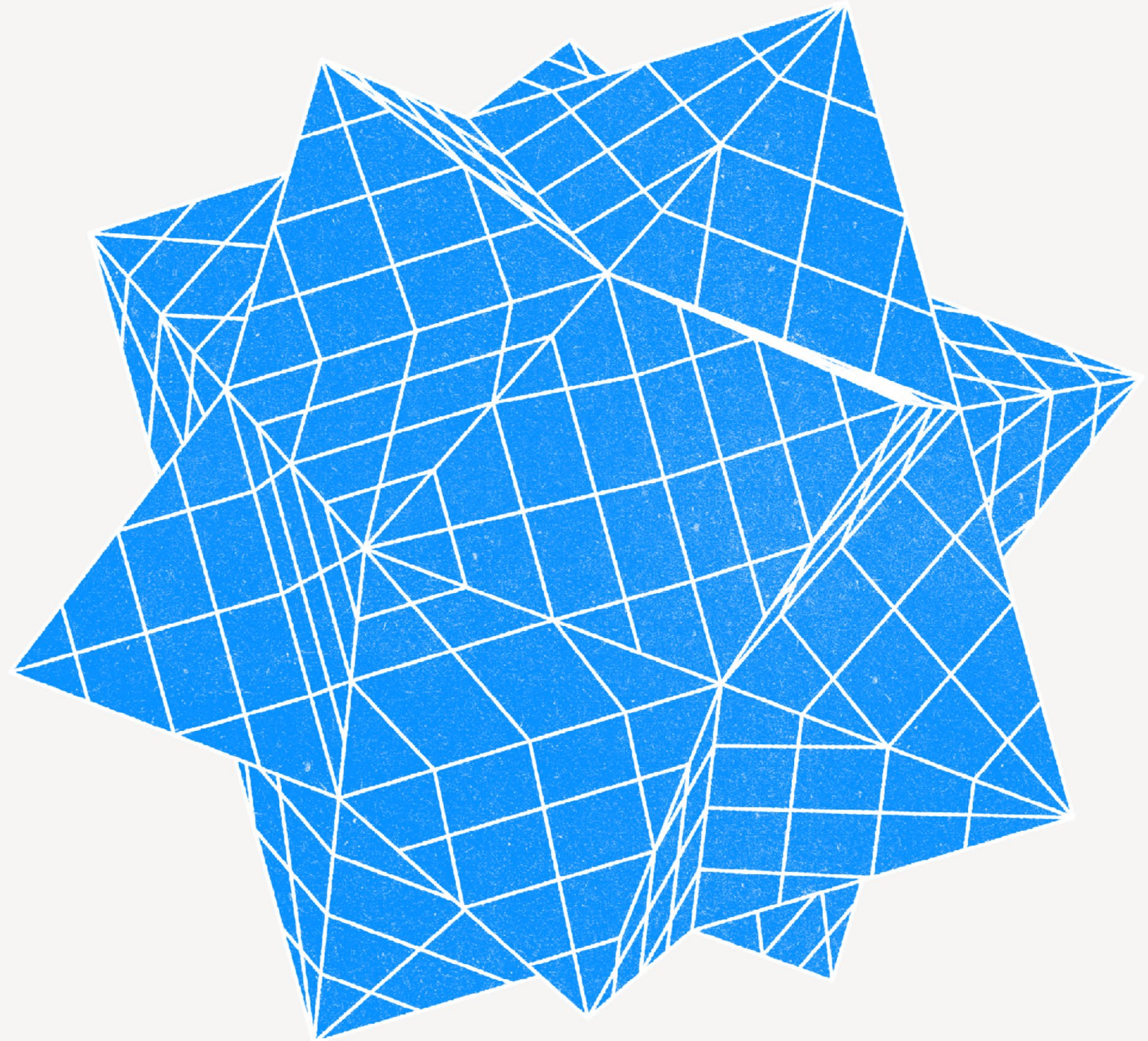
GasBuddy recently added a "deal alerts" feature that will inform users of reduced gas prices. The feature displays prices in a location display so users know what deals are closest to them. The deal alerts feature can also be customized due to the brand's partnerships with fuel companies that may want to reduce prices to increase their customer base. Additionally, Gas Buddy offered a \$5 credit to the first 10,000 users who signed up for the service.

Overall the new features could be popular with price-sensitive consumers who want to be informed about potential gas deals in their area. Additionally offering credits could entice users who may not have otherwise decided to use the GasBuddy platform.

Source: <https://www.trendhunter.com/trends/deal-alerts>

Trend 2

D O I T
YOURSELF
I N N O V A
T I O N





I N T R O D U C T I O N

We're witnessing a surge in lockdown innovation, with homeworking becoming the norm for so many. People are creating offices at the end of their gardens, redefining spaces and re-envisioning the home as the "multiverse" (school, party venue, study, investment management space).





People now have more time to think about installing an EV charger at home, or to think about solar panelling.



WHAT'S NEXT

Utilities are powering this trend, with extension cords electrifying home offices at the end of the garden. Meanwhile, people may now have more time to think about installing an EV charger at home, or to consider solar panelling.

Now to empower their customers in even more ambitious ways: Think about the utility that can offer new prosumer or private community tools (through Blockchain), enabling people to construct their own personal renewable power prosumer ecosystem.

And utilities' customers will increasingly "do it themselves" with a new menu of tools and technologies from which to choose, then use and shape to fit their purpose. For instance, will we start to see distributed energy resource (DER) and connected energy devices coming to the market?

It all adds up to an opportunity for people to upgrade their energy lifestyle at home, and a conversation-starter for utilities on the innovations they've been developing for years. Consider this: demand for online tutorials and how-to videos has risen dramatically from March 2020, with Google reporting a 65% increase in watch time for "step-by-step" and "for beginners" videos.



Enabling people to construct their own personal renewable power prosumer ecosystem.



The Bluetti AC200 Portable Solar Power Station Charges 17 Devices



The Bluetti AC200 Portable Solar Power Station is an eco-friendly power solution for travelers and adventurers alike that will enable them to enjoy electricity access from virtually anywhere. The unit supports use with solar panels up to 750W, which can fully charge the battery in just 3.5 hours. Aside from solar charging, the unit can be recharged via conventional methods like AC, through an automobile, a generator and more.

The Bluetti AC200 Portable Solar Power Station is outfitted with an electric vehicle-grade battery pack from LG that is rated for more than 2,500 cycle, while the various connectivity ports on the unit allow for 17 devices to be powered at once.

Source: <https://www.trendhunter.com/trends/portable-solar-power-station>

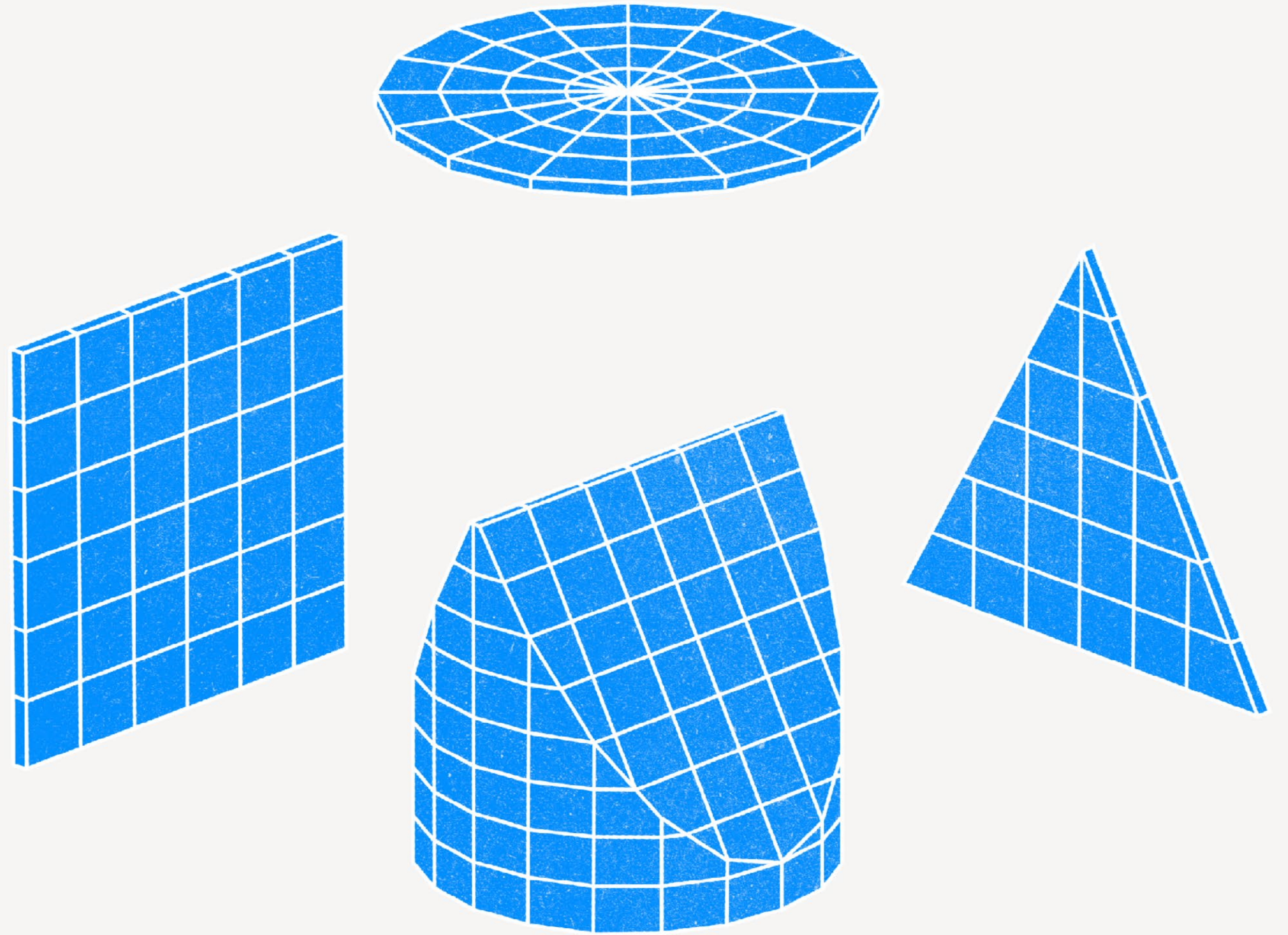
Without refrigeration, it can be a challenge to store perishable items and medicines but Youmma is introducing a solution in the form of a solar fridge that can be used even before an area becomes included in expanded electricity grids. The compact fridge is efficient enough to run on just a single solar panel, and it works alongside a pay-as-you-go system to support families with limited budgets.

Beyond offering obvious benefits, a fridge also has the potential to support people in other ways. According to André Morriesen, product head at Youmma, access to a refrigerator can help support gender equality, as women who ordinarily had to spend hours getting food from markets suddenly have the option to use their time differently.

Source: <https://www.trendhunter.com/trends/solar-fridge>

Trend 3

**S W E E T
T E A M S
A R E M A D E
O F T H I S**

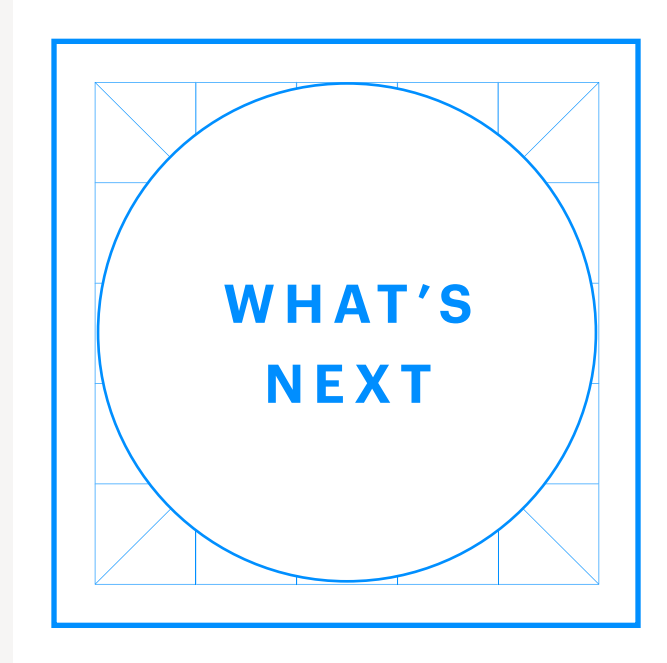




I N T R O D U C T I O N

In 2020, the utilities industry became a virtual workforce overnight, and long-held assumptions about roles and activities, and where and how they could be done, fell away.





But now there's a bigger opportunity for utilities than the virtual, newly-flexible workforce. It's about redefining how utilities provide service. And at the simplest level, it's about operating flexibility. The 9-5 call center may be gone. You can bet on a good percentage of employees putting their hands up for evening or early morning work, or even 24/7.

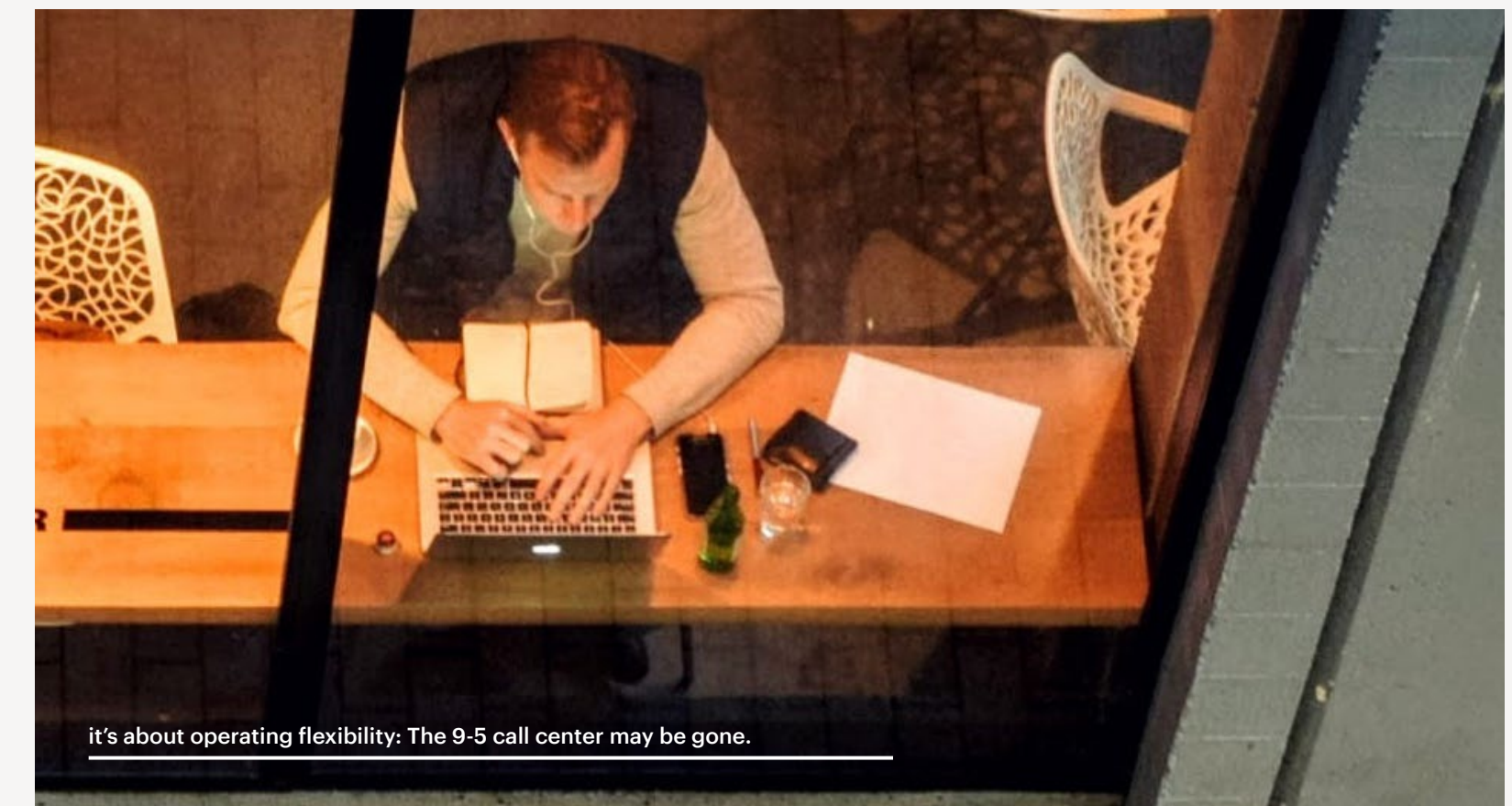
The call center is the tip of the iceberg, with Zoom-ready customers newly open to different ways of communicating with utilities providers. Think virtual boiler diagnostics by video, with the engineer in Scotland and the customer in London,

resulting in faster service, lower GHG emissions and better workforce management. Sounds far-fetched? It's already happening.

And the virtual control center may gather momentum: enabling home-based employees to join the virtual control center room with their co-workers using extended reality (XR).

It all adds up to this: A once-in-a-generation opportunity to reorganize service delivery "outside in," driven by customer needs (versus "inside out" in terms of what can be provided), and give employees serving them an integrated view across their services and interactions (beyond the silo), enabling product bundling or new tariffs for the smart home worker.

Meanwhile, low CO2 data infrastructure must be front-of-mind, with cloud-based data centers under increased scrutiny for GHG emissions performance, and projects and products to be designed, developed and deployed with sustainability at the fore.



it's about operating flexibility: The 9-5 call center may be gone.





The Satechi Smart Outlet WiFi Plug Allows for Scheduling and More

The Satechi smart outlet WiFi plug is a discreetly designed piece of technology for users seeking out a way to enhance their home connectivity without changing up the look of their space too drastically. The unit plugs into an existing outlet and will immediately go to work providing users with the ability to remotely control power access from anywhere on their smartphone. Users can also create daily schedules to have it automatically turn on and off to save electricity while further enhancing overall convenience.

The Satechi smart outlet WiFi plug will work seamlessly with Apple HomeKit to allow users to control functionality using the Siri voice assistant or via the Home app on an iPhone, iPad or iPod touch.

Source: <https://www.trendhunter.com/trends/smart-outlet-wifi-plug>



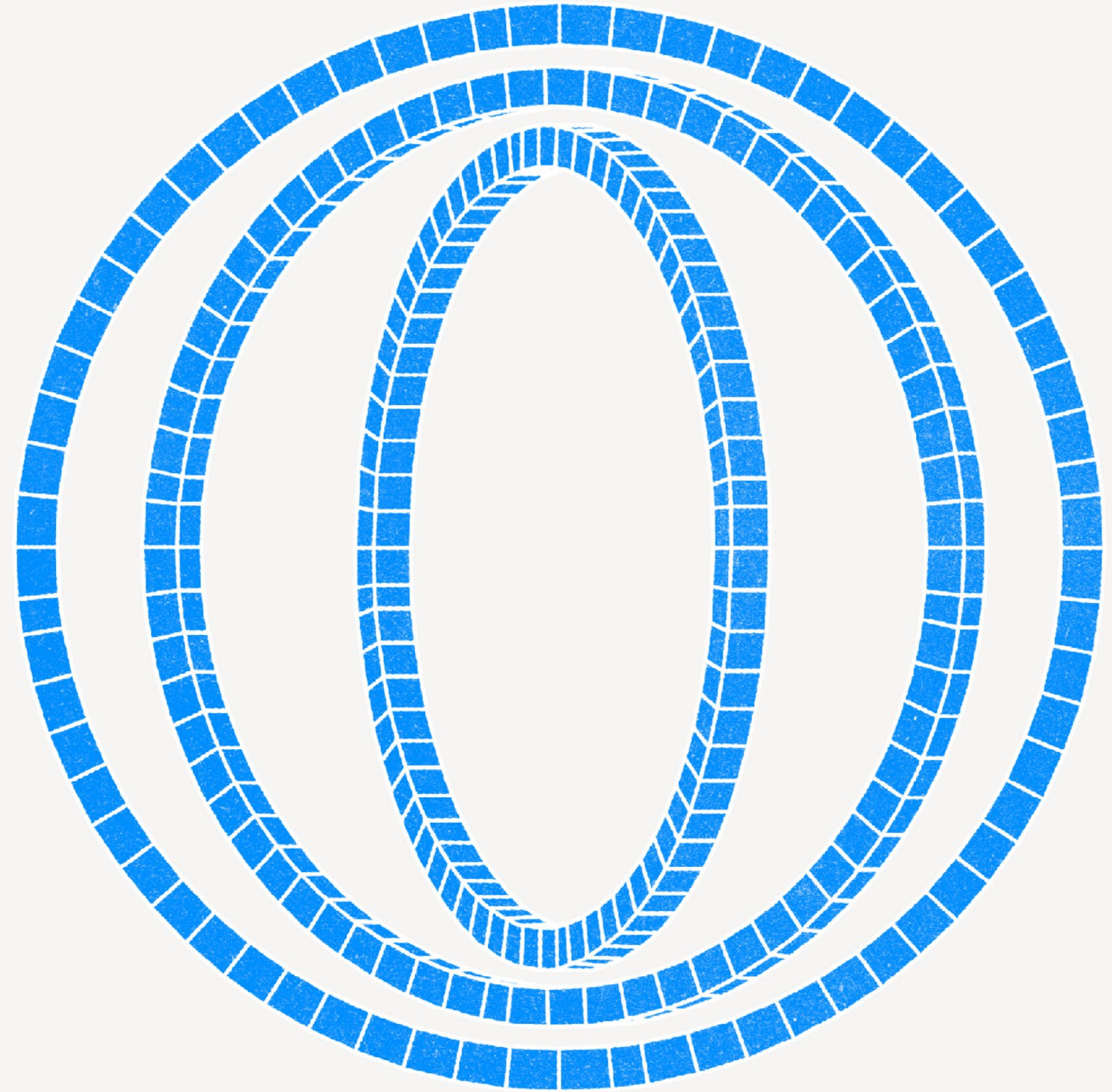
Trend 4

I N T E R

A C T I O N

W A N D E R

L U S T





I N T R O D U C T I O N

Against the backdrop of 2020, big brands are finding connection counts. It's now less about corporates versus individuals, and more about organizations being more human in the way they communicate. Utilities provide a fundamental human need and are operating in a strong space as a result. But how do they strive for humanity, connection and meaningful engagement with customers? People are newly open to different content and learning experiences. It's a call to action for utilities to harness this interaction wanderlust. But how?





Utilities may understand net zero targets, renewables, the GHG emissions impacts of moving to an EV...but do consumers?

WHAT'S NEXT

Democratize customer communication. Consumer behaviors are key to the energy transition, but do they—and do we—understand how? Utilities may understand net zero targets, renewables, the GHG emissions impacts of moving to an EV, but do consumers? Example: your energy bill was huge in 2020 because you were working from home. So your costs are up. But your GHG emissions were much lower than before, because you were on a green tariff. Does your bill tell you that story, or just ask for the money?



Connect the dots: Tell consumers and businesses a story that connects products and services and showcases the breadth of what you can do for them. Case in point: the EV. If you go for a test drive, it doesn't feel that different (apart from the silence!). But if you wrap that experience into a practical articulation of how to charge that vehicle, and the effect on emissions, cost and convenience, it becomes real. And utilities can increasingly offer that end-to-end service (think of EDF Energy with EV leasing, tariffs, charging). It's selling, serving and upskilling in one.

Personalize the conversation: Nothing is more likely to turn off a customer than misdirected information. If you live in an apartment, do

you want to hear about solar panels? Maybe, but only if it's handled the right way. You want a panel but don't have your own roof? No problem. Choose it from the solar farm and rent it. Nice.

Bring it into the classroom. Get in on education, like water companies in Australia, who bring learning about the water cycle into classrooms and engage with children (who educate their families). And the idea goes broader: if you want to start a conversation with consumers about home energy usage and energy efficiency, for instance, get in front of new audiences, with new content, delivered in compelling ways.



Tell a story: wrap that experience into a practical articulation of how to charge that vehicle, and the effect on emissions, cost and convenience, it becomes real. A story connects.



The HoloLens enables the technicians to receive remote technical assistance while performing challenging tasks, thereby improving efficiency.



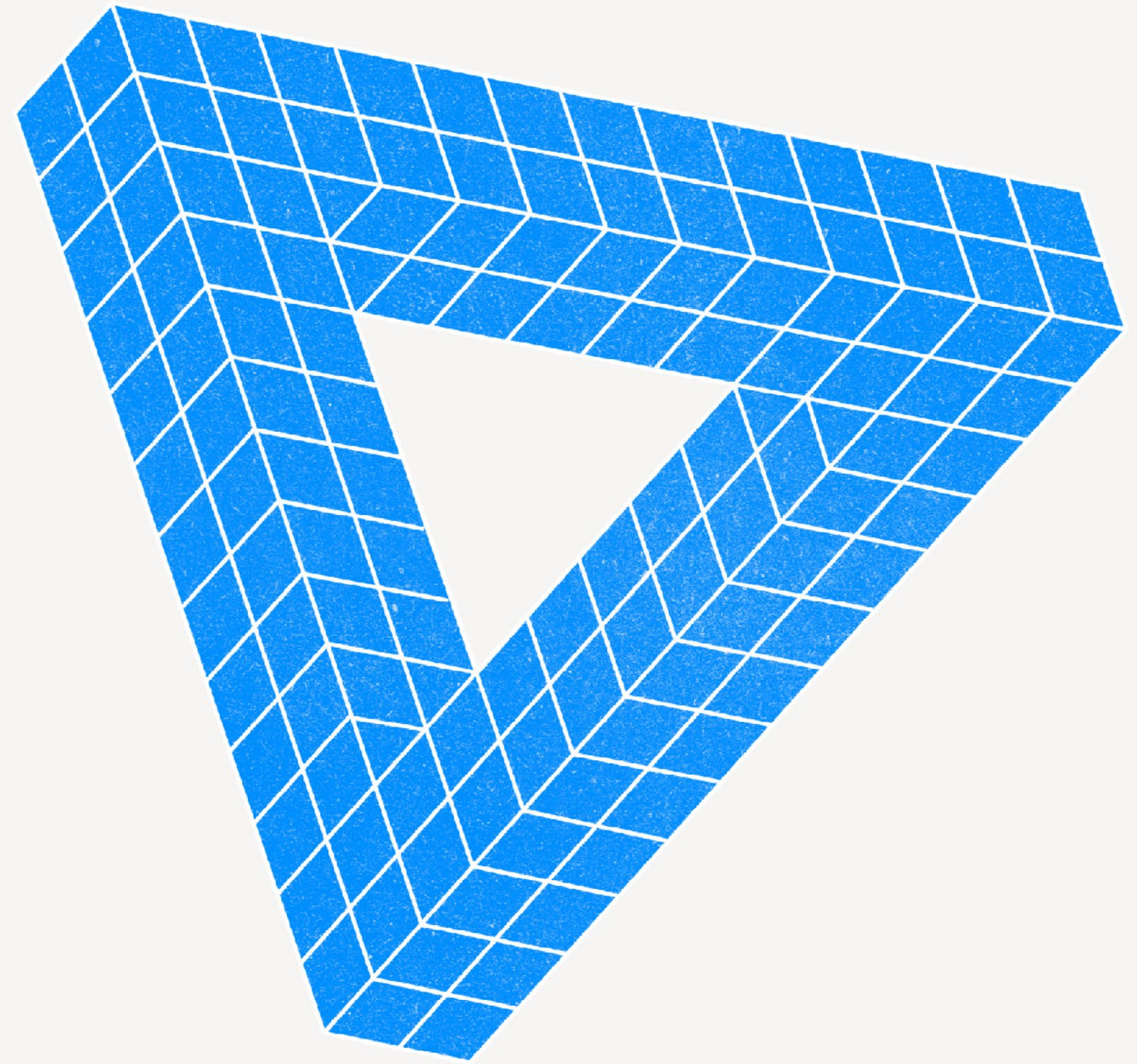
The Amazon Alexa “Pay for Gas” skill is one of the latest capabilities of the voice assistant technology that will help drivers to fill up their tank and get back on the road faster than ever. The new skill has been announced through a partnership with ExxonMobil and Fiserv that will allow drivers to simply ask Alexa to pay for gas when they arrive at the pump. The voice assistant will confirm details including location and pump number before charging drivers through their Amazon Pay account.

The Amazon Alexa “Pay for Gas” skill launched in 2020 and is available at over 11,500 Exxon and Mobil gas stations. While drivers still have to get out of their vehicle to pump gas, the new voice assistant skill is helping to further streamline the payment process by eliminating the need for physical cards or cash.

Source: <https://www.exxon.com/en/amazon-alex-pay-for-gas>

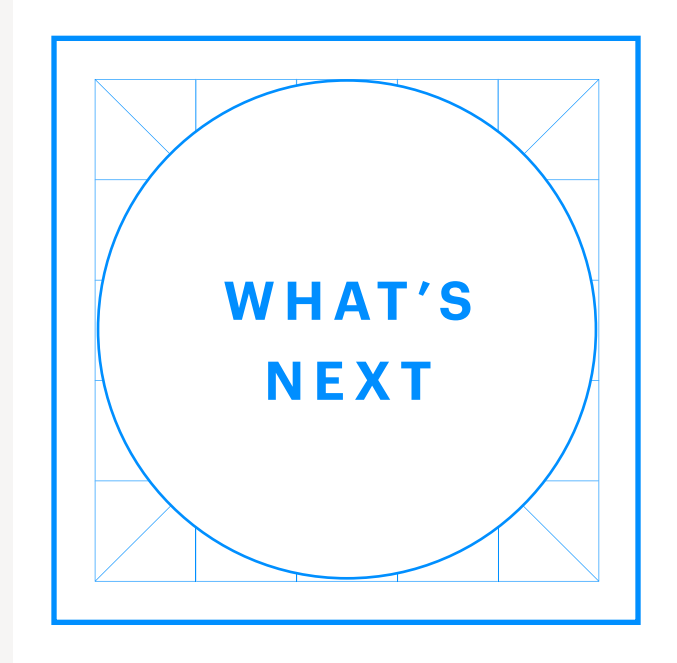
Trend 5

**L I Q U I D
I N F R A
S T R U C T U R E**



I N T R O D U C T I O N

Infrastructure and supply chains have come into stark focus in 2020, with organizations needing to build agile and resilient supply chains. Meanwhile, with online ordering surging, delivery has become the point of human connection and the face of the customer experience. It transforms the conversation from last mile delivery to “last few feet” delivery as a differentiator and a way to engage. Now think about the role utilities play, with their field forces in the thick of the community.



T Think of the utility engineer as the lifeline, not just the trouble-shooter: The utility engineer is among the most trusted people in the community. A lifeline. This uniquely positions them to check on vulnerable customers, help people save money on their bills with services or technologies (scouting for the right location for an EV charging point, for instance), and connect them to other organizations if they need help.

Extend humanity to the contact center. The human connection goes beyond the field force. Why should the customer need to speak to a new person every time they call a contact center? With the right routing infrastructure, the customer can be connected back to

someone who has dealt with them before (even if that means a call-back, with agents working flexible hours at home). It's about making the personal connection.

Look to other industries for what's working. Case in point: Stitch Fix, giving a personal shopping experience at scale. They give you a personal stylist (whom you can keep or switch over time), tailored outfits, shipping, returns, messaging for the stylist when they (or the algorithm!) miss the mark—it's this kind of humanity and ease customers now want across platforms.



Stitch Fix, giving a personal shopping experience at scale. It's the humanity and ease customers now want across platforms.



Solar panels are quickly showing up on a variety of different homes and vehicles but are characterized by their blacked-out design that needs to be placed on empty space. Researchers are investigating transparent solar panels to help transform the industry.



These Solar Panels Could Capture Energy on Any Building

These solar panels are being developed by New Mexico-based UbiQD and consist of glass that is integrated with Quantum Dots that are capable of manipulating the light to harness energy. This could transform construction by allowing builders to use window-like solar panels across skyscrapers and even conventional consumer homes for enhanced sustainability.

The transparent solar panels with Quantum Dots from UbiQD demonstrate how our electricity infrastructure can be transformed with a design-friendly, visually unobtrusive solution.

Source: <https://www.trendhunter.com/trends/transparent-solar-panel>

Autoclaves are devices used to sterilize medical tools in hospitals and clinics, relying on heat (about 125 degrees Celsius) to remove pathogens. This heat is usually achieved by using electrical or fuel-powered appliances, but in many parts of the world (especially in rural areas) those power sources are limited or expensive.

To solve this challenge, a team of researchers from the Massachusetts Institute of Technology (MIT) and the Indian Institute of Technology have come together to develop a new sustainable autoclave. The new autoclave uses sunlight as its power source, eliminating the need for unavailable or expensive energy sources such as electricity or fuel, although a small clinic will still need to use a 2m² sun collector to make it work. Additionally, a prototype was successfully tested in Mumbai, India.

Source: <https://www.trendhunter.com/trends/autoclave>

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