

# Use microtargeting techniques to achieve your energy-efficiency goals



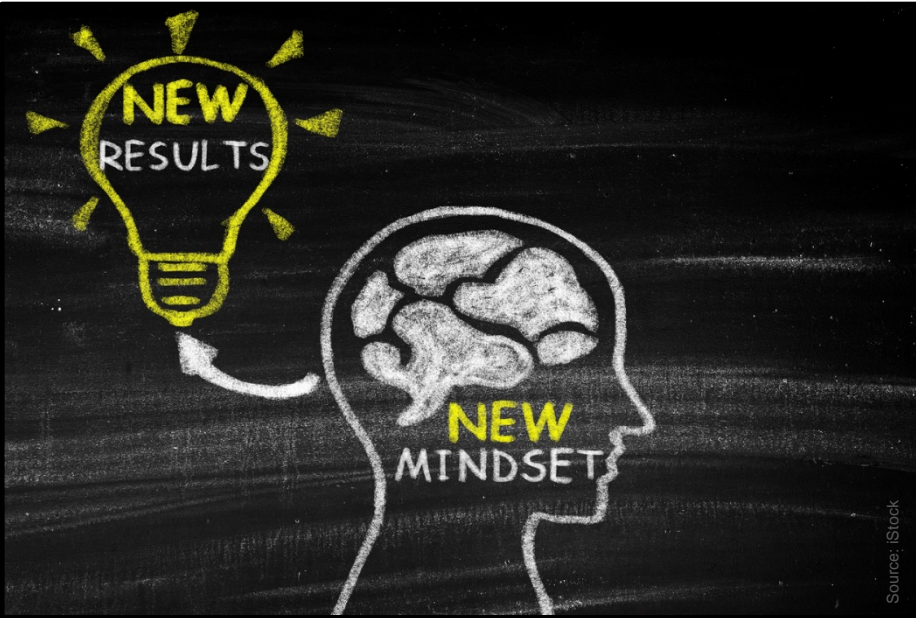
**E Source**

**Cindy Schweitzer**, Vice President,  
Customer Solutions

**Rachel Cooper**, Director,  
Market Research

**Chad Garrett**, Managing Director,  
Consulting and Advisory Services

# Welcome!



- Goals for today's web conference
- Mindset change
- Today's agenda

# Today's presenters



**Cindy Schweitzer**

Vice President, Customer Solutions



**Rachel Cooper**

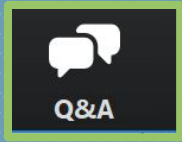
Director, Market Research



**Chad Garrett**

Director, Consulting and Advisory Services

# Submit your questions using Zoom Q&A



Use the Q&A button on the bottom of the screen to send your questions to our team.

*Having technical issues? Email [events@esource.com](mailto:events@esource.com) or call 1-800-ESOURCE*

# We're polling today!

1.

What is your favorite color?



Single Choice



Multiple Choice

a) blue

b) red

c) Green

d) purple



zoom

# COVID-19 expected to lead to lower energy savings

Most utility DSM executives expect a savings reduction of at least 11%

Many expect savings to decline more than 20%



Source: E Source Spring 2020 DSM Executive Council

## Goals are staying the same

78% of utility DSM executives expect savings goals to stay the same



11% expect a lower goal  
(another 11% don't know yet)

Source: E Source Spring 2020 DSM Executive Council

# Poll question #1

Are you on track to meet your 2020 residential and low-income portfolios goals?

- Yes
- Maybe; time will tell in Q3 or Q4
- No



# Interest in virtual audits during COVID-19

Suburban middle class—Claritas “Middleburb” social group

- Virtual audit top target (20% interested during COVID-19)
- Below-average interest in other efficiency approaches during COVID-19, including appliance rebates, weatherization, home automation devices



Source: E Source Residential COVID-19 Impact Survey, May 2020

# Segmenting versus microtargeting

Segmentation is like duct tape ...

It works really well,  
but we expect too  
much from it



Microtargeting is the whole toolkit ...

You get better results when you match  
the right tool to the job

# Partnership



**Who we are together.** A proven and respected energy **customer activation** partner, leveraging proprietary data, unique market research, powerful analytics, and industry experience to help clients:



## Identify

the best customers

## Design

the right customer solutions,  
channels, and messages

## Deliver

the right media and messages

## Optimize

campaigns and solutions  
with measurement

# Benefits of microtargeting

**Increase** cross-promotion opportunities

**Choose** the right creative, messaging, frequency, and channel

**Amplify** your call to action and increase adoption

**Maximize** the impact of marketing and outreach dollars for DSM programs

**Reduce** customer acquisition costs



# Our solution provides you with ...



The ability to better **tailor your outreach** to custom target groups, using customized program segmentation schemas and microtargeting



Data on which communication channels and messages will **resonate with your custom target groups**



**Complete household-level data** appended to your customer data



**Market researchers, data scientists, and consulting team experts** to analyze the data and provide recommendations



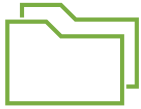
Refined and operationalized **custom target group data** for your marketing agency

# Poll question #2

How have you changed your marketing strategies as a result of COVID-19? (Select all that apply.)

- ☐ Placed greater emphasis on digital advertising and recruiting
- ☐ Increased marketing budget
- ☐ Changed messaging to reflect COVID-19
- ☐ Paused customer acquisition efforts temporarily
- ☐ Further utilized microtargeting and segmentation
- ☐ We haven't made significant changes as a result of COVID-19

# Segmentation and microtargeting enables actionable insights



## Customer/ market data

Build on what you already know about your customers, whether you know a lot or a little



## Unique E Source & Claritas information

Add an in-depth understanding of demographics, technology usage, lifestyles, attitudes, online, mobile, TV, print, radio, restaurant, and shopping preferences



## Deeper view of customers

Utilize a consistent consumer framework across your organization to understand, find, and engage with your best customers and prospects

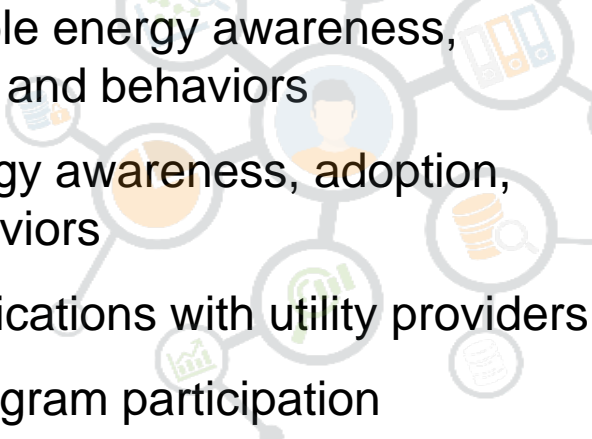


# Virtual audits



# Types of customer information we have

Virtual audits

- 
- Appliances and outdoor equipment in and around the home
  - Energy conservation opinions and actions at home
  - Energy costs and utility billing
  - Heating and cooling systems in the home
  - Online experience with utility providers
  - Opinions of utility providers
  - Renewable energy awareness, attitudes, and behaviors
  - Technology awareness, adoption, and behaviors
  - Communications with utility providers
  - Utility program participation
  - Responses from a recent COVID-19 survey

# Step 1: Create/review custom target audience

Virtual audits



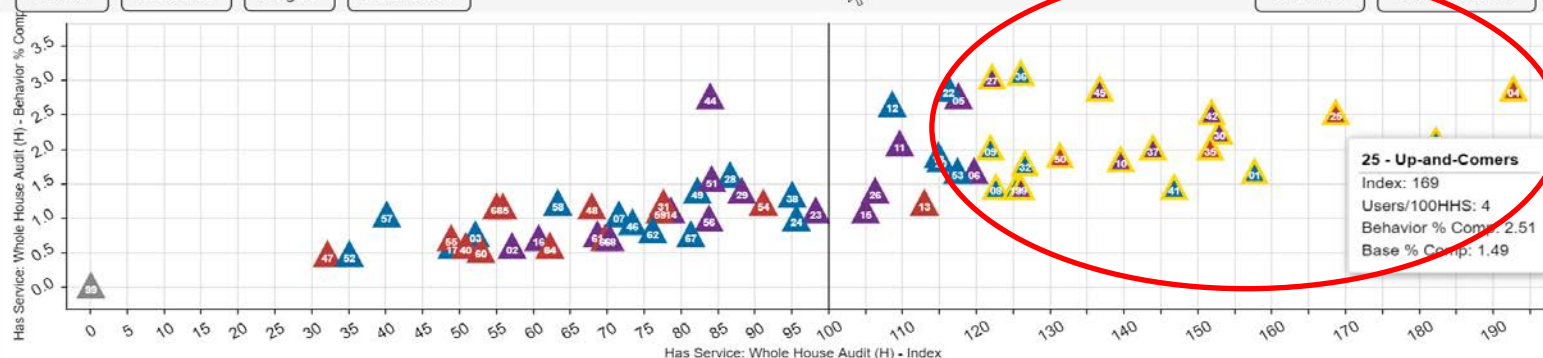
Provide Feedback

Home > Target Group Creator > Select Segmentation System > Chart View



Profiles Measures Origins Axis Values

Grid View Clear Selections



Energy Premium (Claritas), 2019  
Copyright 2017. Claritas, LLC  
Game Plan Grid

Lifestyle Group Themes

Younger Years

Family Life

Mature Years

Target Name Whole Home Audit TG

Target Theme #006699

Create Target

Name the Target Group

Whole Home Audit TG

Description

Create Target Group



## Midscale virtual audit enthusiasts

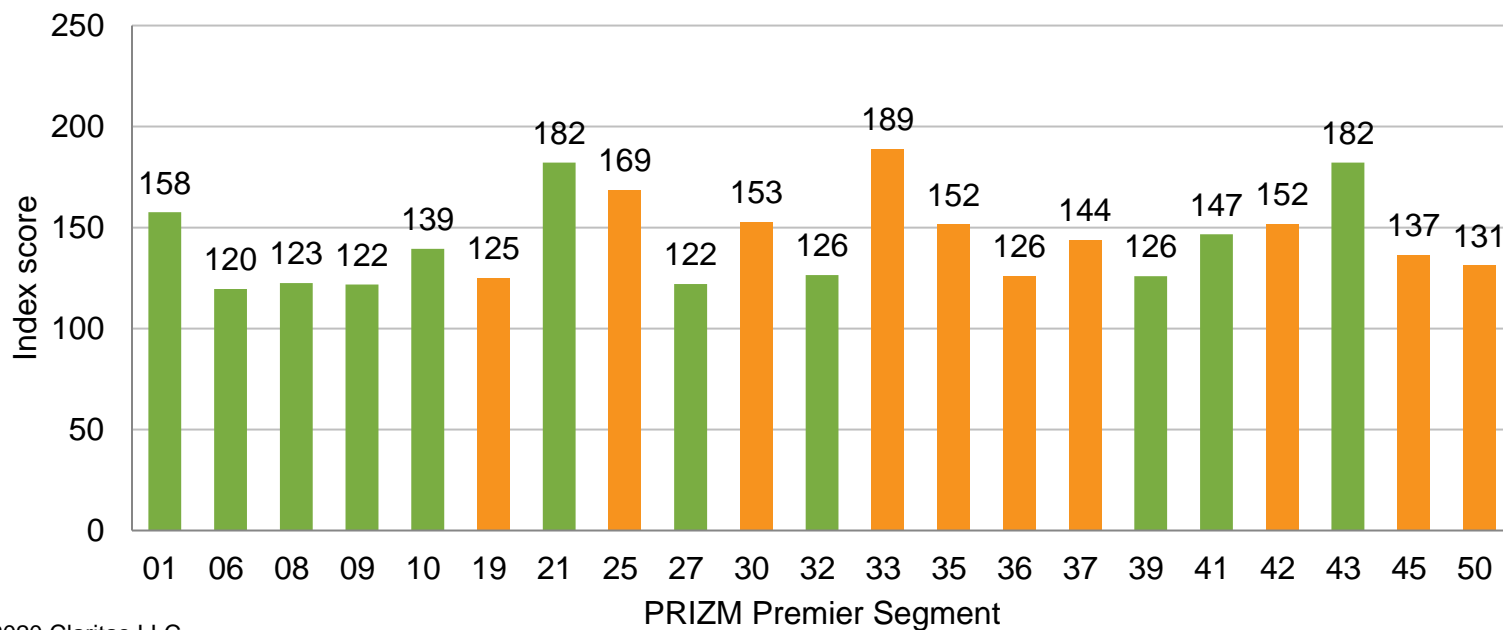
19 American Dreams  
25 Up-and-Comers  
30 Pools & Patios  
33 Second City Startups  
35 Urban Achievers

36 Toolbelt Traditionalists  
37 Bright Lights, Li'l City  
42 Multi-Culti Mosaic  
45 Urban Modern Mix  
50 Metro Grads

Virtual audits

# 15%

US households



© 2020 Claritas LLC

# Step 2: Discover more about the target audience

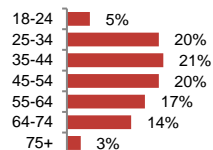
Virtual audits

## PRIZM® PREMIER LIFESTAGE STORYBOARD

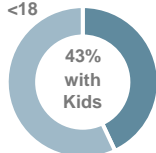


### Demographics

#### Household age



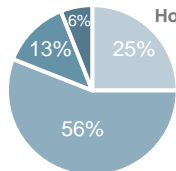
#### Kids <18



71%  
Home Owners



52%  
Married



#### Household income

- < \$40K
- \$40K - \$99K
- \$100K - \$149K
- \$150K+



### Online interactions with energy provider

- Access energy-efficiency information
- Apply for rebates
- Check service consumption
- Check the status of service repair or order
- Enroll in efficiency program
- Establish/transfer service
- Get product and service information
- Online chat with service rep
- Order new products and services
- Schedule appointment
- Setup alerts
- Submit a question
- View outage map
- Prefer digital channels (website, social media, mobile app, text)



### Energy behaviors and attitudes

- Participate in energy-efficiency programs, services, rebates
- Motivated by cost savings and environmental benefits
- Participates in Energy Assistance Program (H)
- Participates in billing options (fixed/flat, prepay, select due date)

#### Tech usage

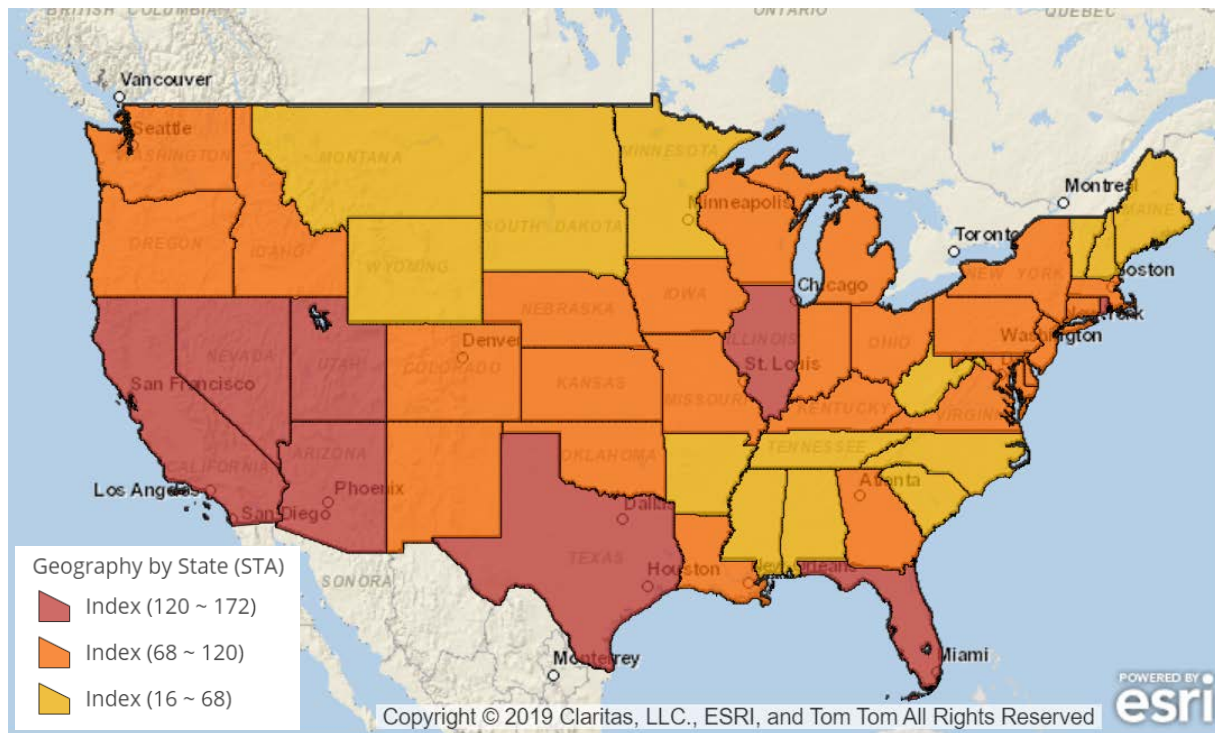


© 2020 Claritas LLC

# Step 3: Locate your target audience

Virtual audits

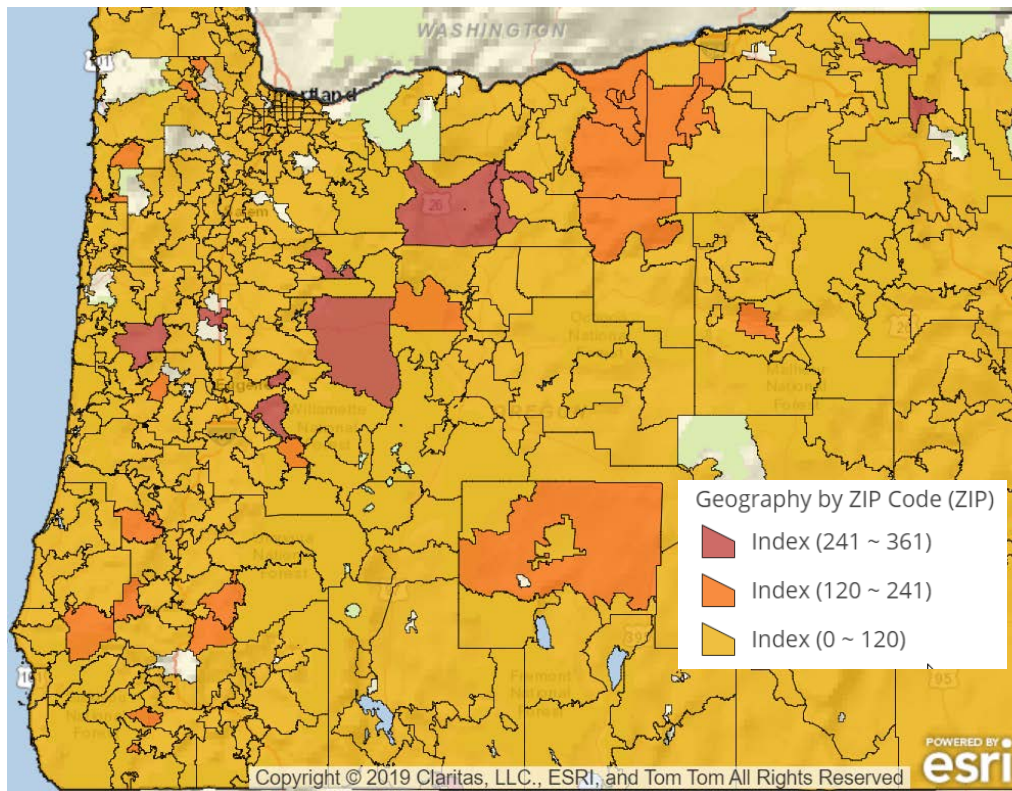
US by state



# Step 3: Locate your target audience

Virtual audits

Oregon by zip code

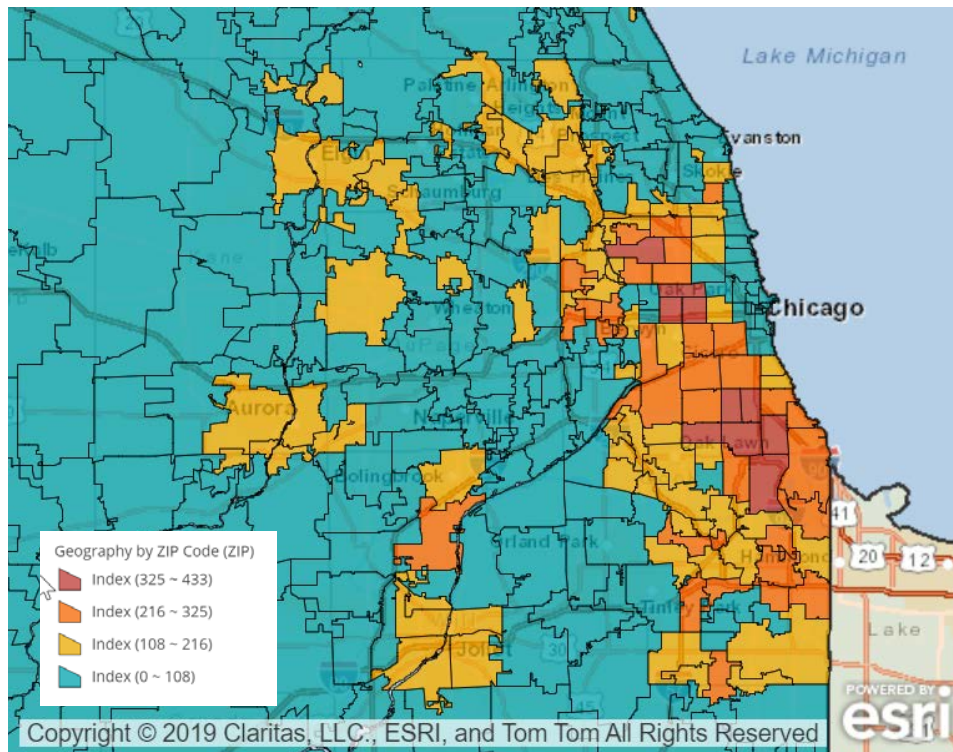




# Step 3: Locate your target audience

Virtual audits

Illinois by zip code



# Next step: Reach your target audience

Virtual audits

Once we know the key PRIZM Premier segments, we can:

## Append

Add codes to your customer or prospect database

## Behavioral insights

Identify consumer segments more likely or less likely to engage in a behavior

## Distributions

Quantify compositions for any geography (i.e., trade areas, markets, regions, etc.)

## To reach your target audiences everywhere



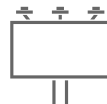
TV



Print



In-Office



Out of home



Direct mail



Desktop



Mobile



CRM

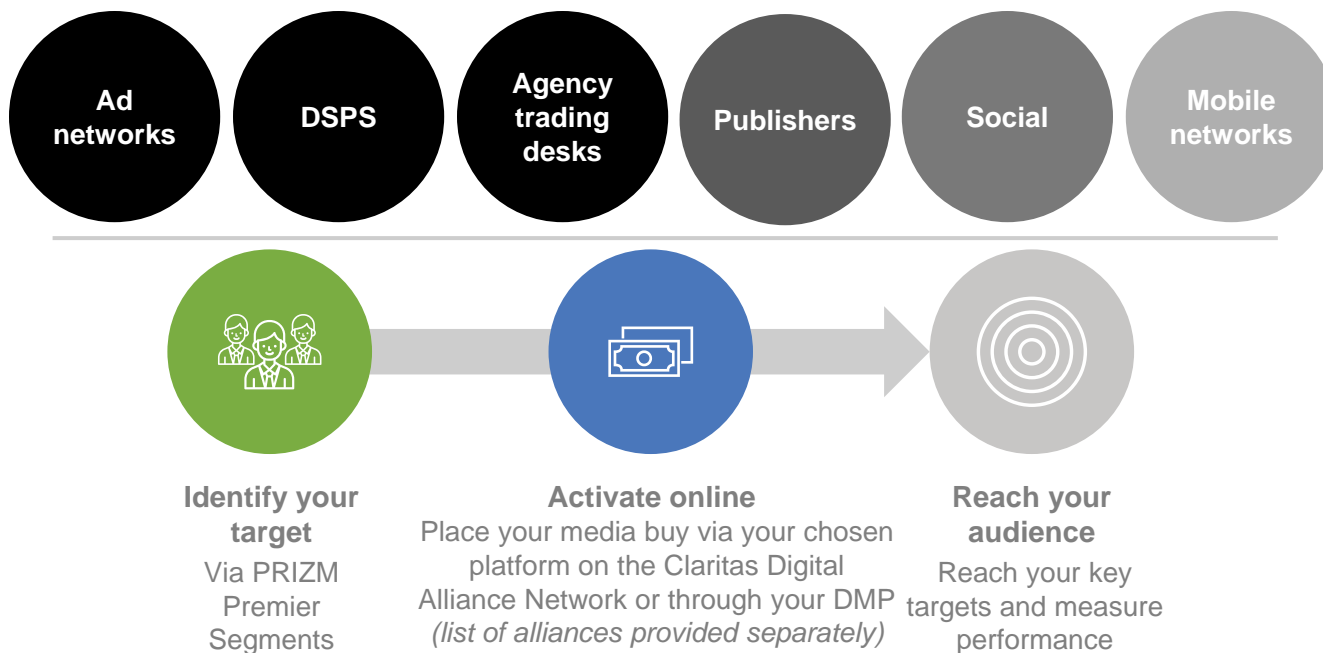
Sources: Claritas Household Demographics 2018, Claritas Consumer Profiles 2018, Claritas GfK MRI Behavior Profiles 2018, Nielsen Online Behavior Profiles 2017, Nielsen Television Behavior Profiles 2017.



# Next step: Reach your target audience

Virtual audits

**Digital alliances:** Claritas data is available through over **125 digital media alliances**



# Next step: Reach your target audience

Virtual audits

Target or onboard audiences wherever you're marketing



Plus hundreds of media platforms, DMP, mobile, TV, and publishers:

All accessible via LiveRamp,  
Nielsen Marketing Cloud, and Oracle BlueKai

# Next step: Reach your target audience

Virtual audits

Be in front of the right customers at the right time with the right message

## E Source and Claritas Prizm Premier + Claritas Identity Graph



## Omnichannel execution



### Email



Select and reach prospects with pinpoint accuracy and industry-leading scalability



### Social

Engage across the key social media platforms that your audiences prefer



### Display

Activate audiences across display platforms, reaching consumers in non-logged-in environments



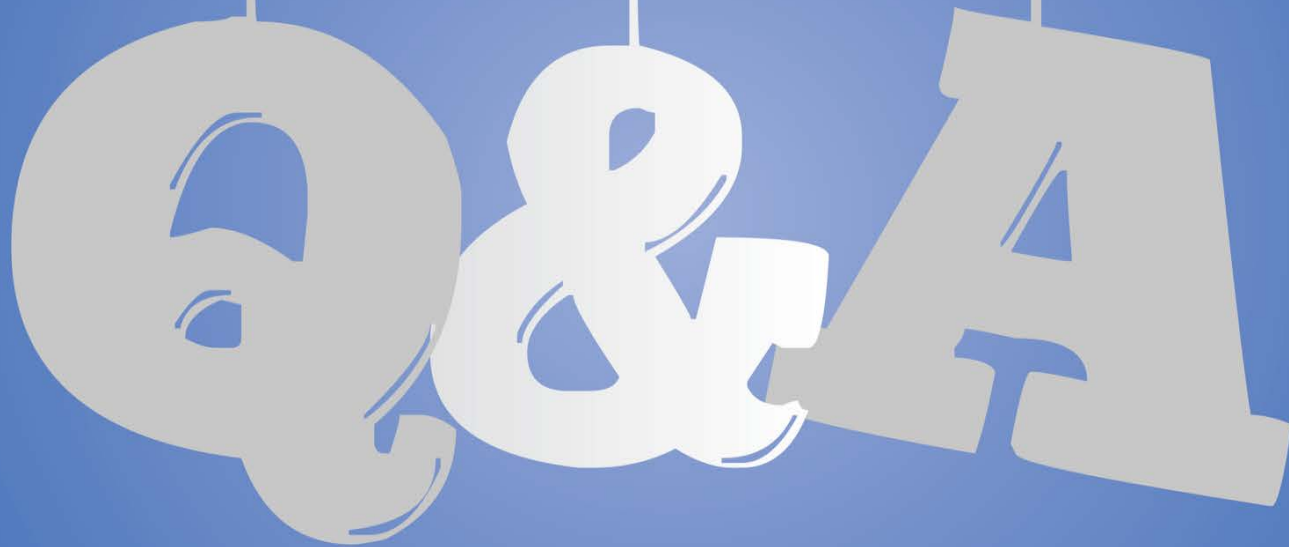
Create ideal audiences, determine the best channels, and decide where and when to engage

# What you'll get

Virtual audits

## Home/Virtual Audits

- Identify goals and success factors of campaign and number of customers
- Review and analyze customer data: zip code +4/6, past program participation, other utility data
- Excel workbook of customer target groups
- PRIZM Premier appended to customer data
- Target concentration maps and propensity storyboards
- Review of data, analysis, and recommendations
- Test sample
- Monthly appendages of data, if applicable



# Thank you!



## **Cindy Schweitzer**

Vice President, Customer Solutions

E Source

608-574-4685

[cindy\\_schweitzer@esource.com](mailto:cindy_schweitzer@esource.com)



## **Rachel Cooper**

Director, Market Research

E Source

303-345-9117

[rachel\\_cooper@esource.com](mailto:rachel_cooper@esource.com)



## **Chad Garrett**

Director, Consulting and  
Advisory Services

E Source

303-345-9151

[chad\\_garrett@esource.com](mailto:chad_garrett@esource.com)

You're free to share this document in its entirety inside your company. If you'd like to quote or use our material outside of your business, please contact us at [customer\\_service@esource.com](mailto:customer_service@esource.com) or 1-800-ESOURCE (1-800-376-8723).