

Using Data to Drive Your Business Marketing Decisions

Sharing Data Insights

Luke Currin

Senior Manager, E Source

Rachel Cooper

Lead Analyst, E Source



E Source

Web conference

Today's outline

Introductions

Data basics

Topical insights

New user experience

Next steps and questions



Presenters



Luke Currin

Senior Manager, Marketing and Communications, E Source

303-345-9111 luke_currin@esource.com



Rachel Cooper

Lead Analyst, Market Research, E Source

303-345-9117 rachel_cooper@esource.com

POWERING WHAT'S NEXT



Who we are

A research and consulting firm focused exclusively on utilities and their customers



Clients

We work with over 300 utilities and their partners



Founded

Founded in 1986, we've been in the industry for over 30 years



Headquartered

Boulder, Colorado

What does E Source offer?





**Why should you
use E Source data?**

What does the FUTURE DIRECTION for marketing and communications look like at your utility?

 When poll is active, respond at **PollEv.com/esourcepolls106**  Text **ESOURCEPOLLS106** to **22333** once to join

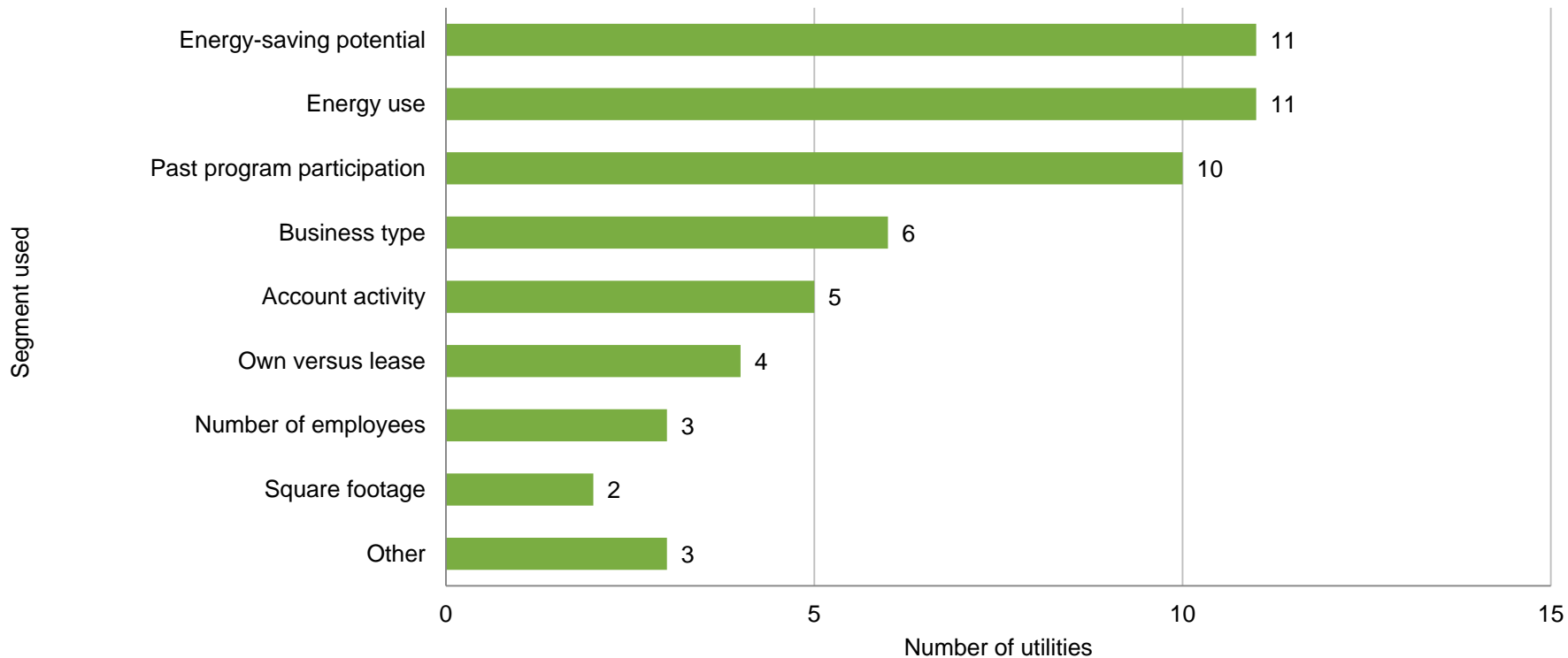


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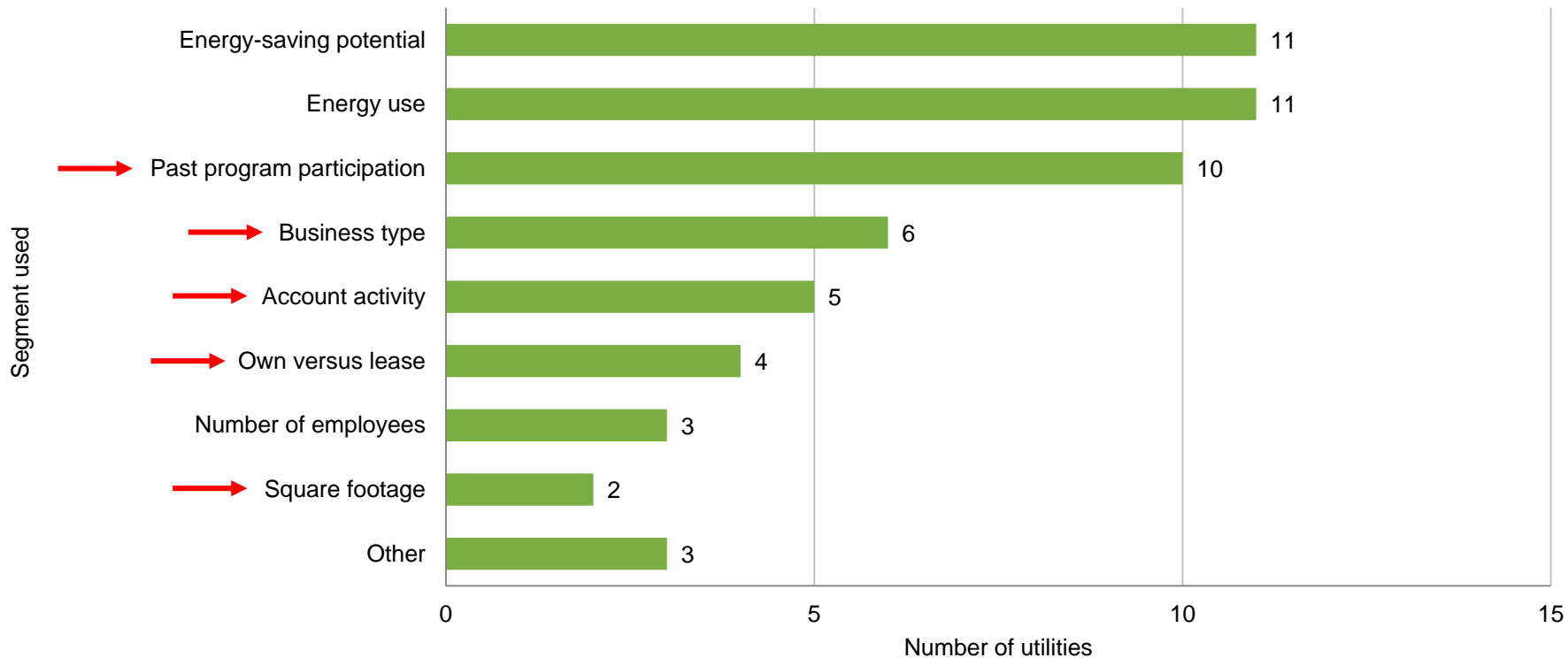
Small and midsize business (SMB) customer segmentation



Base: Participants who segment their business customers, n = 16. **Question S4_4b:**
How do you segment your SMB customers? (select all that apply.)

© E Source (2018 Utility Marketing Survey)

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Survey methodology

Data are drawn from the E Source Business Gap and Priority Benchmarks:

- Annual, online survey with large businesses and small and midsize businesses in the US
- Participating utilities provide business customer lists for the survey sample
- Business sectors with 30 or more overall respondents are displayed on the dashboard
- Data can be filtered by business size, sector, and survey year



Business sectors

- Agribusiness
- Congregation or house of worship
- Data center
- Education
- Governmental or public administration
- Grocery
- Healthcare
- Industrial and manufacturing
- Laboratory
- Lodging
- Office
- Property management
- Restaurant
- Retail
- Service
- Warehouse
- Water utility





Business Sector Marketing Profiles Resource Center

DECEMBER 21, 2016



Agribusiness

Small agribusiness customers run myriad operations with small staff. They're looking for efficiency programs that offer rebates and solid returns on investment. Learn how to reach these customers, which utility-provided energy-savings programs they're interested in, and who they trust for energy management advice.



Data Centers

Large data center customers are critical customers for utilities. In this report, find out more information about how to reach these customers, which utility-provided energy-savings programs they're interested in, and who they trust for energy management advice.



Grocery and Convenience Store

Managing energy costs is of high importance to groceries and convenience stores. Particularly, this sector is looking to its utilities to provide refrigeration energy-saving programs as well as lighting, HVAC, and on-site energy audit programs.



Healthcare

Small and midsize healthcare businesses look to their utility, similar businesses, government agencies, and business associations for energy-efficiency advice. They're highly interested in HVAC programs, on-site energy audits, lighting programs, and office equipment or plug load programs.

The dashboard



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Filters

Show years

[2016](#) [2014](#)

Business size

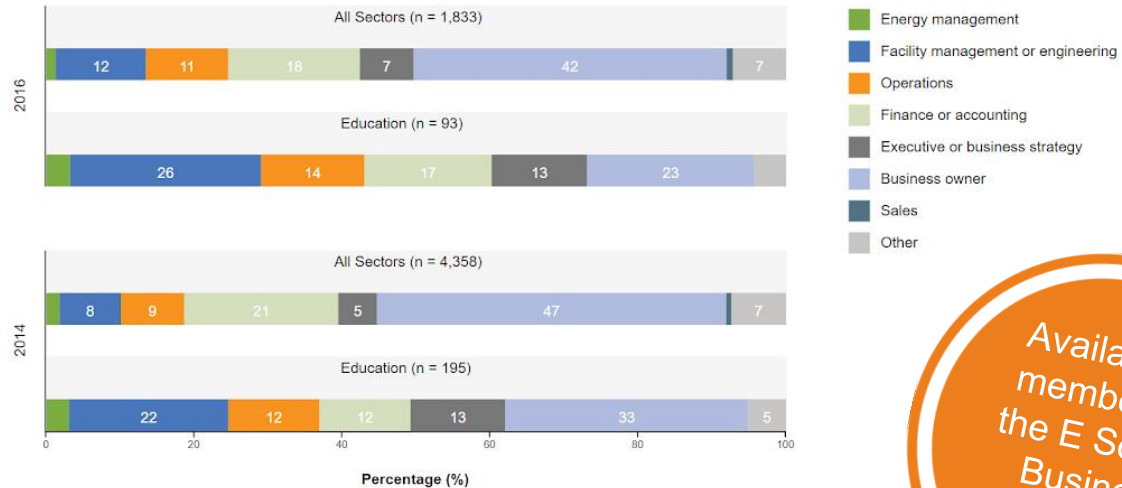
Small business

Sectors

- ☒ All Sectors
- ☐ Agribusiness
- ☐ Congregations or houses of worship
- ☐ Data center
- ☒ Education
- ☐ Governmental or public administration
- ☐ Grocery
- ☐ Healthcare
- ☐ Industrial and manufacturing
- ☐ Lodging
- ☐ Office
- ☐ Property management
- ☐ Restaurant

Primary role or responsibility (Small business)

[PDF this page](#)



Base: All respondents.

Question: Which of the following best describes your primary role or professional responsibility? (Large Business Gap and Priority Benchmark, S4_3; Small and Medium Business, S5_3.)

Note: Data may not add to 100 percent due to rounding. Because respondents were not required to answer this question, the data is based on those who provided a response.

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Business dynamics

Energy- and stakeholder-related nuances at the business:

- Responsibility for energy management
- Primary role or responsibility
- Responsibility for paying utility bills
- Company method for making energy-related decisions
- Importance of managing energy expenses
- Energy-related business goals
- Stakeholder involvement in energy-related decisions
- Financial thresholds for projects
- Timeline for investments in projects
- Trusted resources for energy advice



Trusted resources

Q: Who do business customers turn to for energy-efficiency advice or information? What resources do they use?



Trusted resources

Q: Who do business customers turn to for energy-efficiency advice or information? What resources do they use?

A: Although **their utility** rose to the top of the list, business customers trust other entities, varying by business size and sector.

SMB customers turn to colleagues at similar businesses next, while **key accounts** turn to consultants next.



Decision-making

Ask E Source

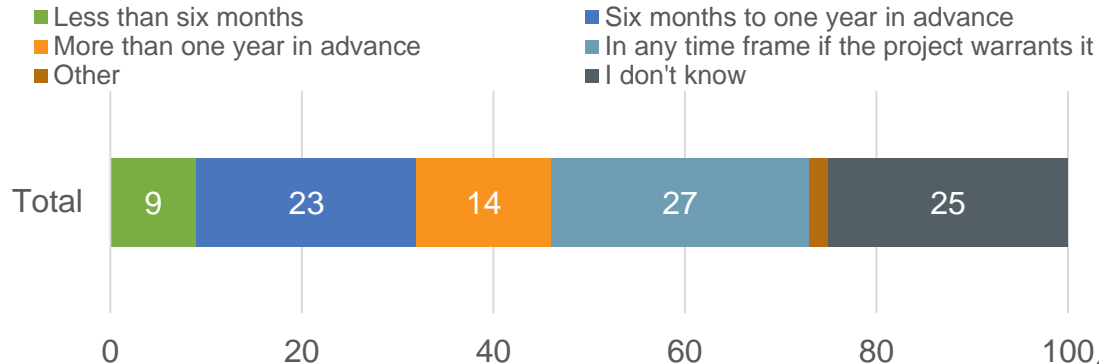
Q: What insight does E Source have on how far in advance businesses plan for participating in energy-efficiency programs?



Decision-making

Q: What insight does E Source have on how far in advance businesses plan for participating in energy-efficiency programs?

A: **32%** of business customers said one year or less when asked how far in advance they plan for participating in energy-efficiency projects.



Interest in energy-efficiency programs

Utility-provided energy-savings programs:

- Behavior programs
- Building shell
- Combined heat and power or cogeneration
- Commissioning
- Compressed air
- Cooking equipment
- Demand response
- Industrial processes
- IT infrastructure
- Lighting
- Office equipment
- On-site renewable energy systems
- Pumps and motors
- Refrigeration
- Space cooling
- Space heating
- Water heating



Energy-efficiency and demand-response programs

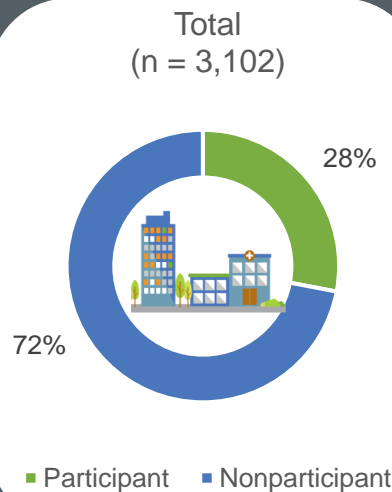
Q: What proportion of business customers have participated in an energy-efficiency program in the past year?



Energy-efficiency and demand-response programs

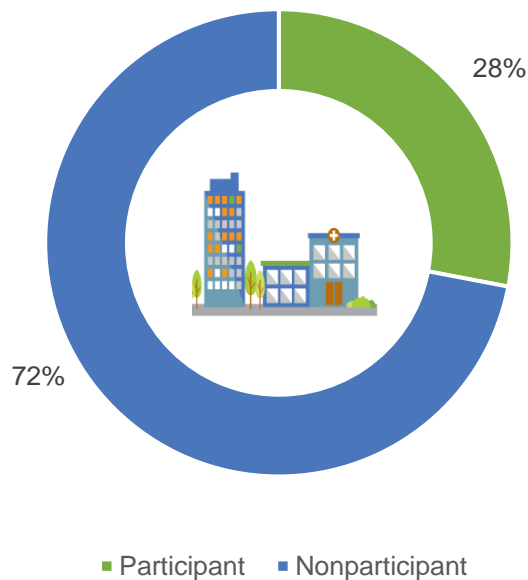
Q: What proportion of business customers have participated in an energy-efficiency program in the past year?

A: **28%** of business customers tapped into utility energy-efficiency programs in the past 12 months.

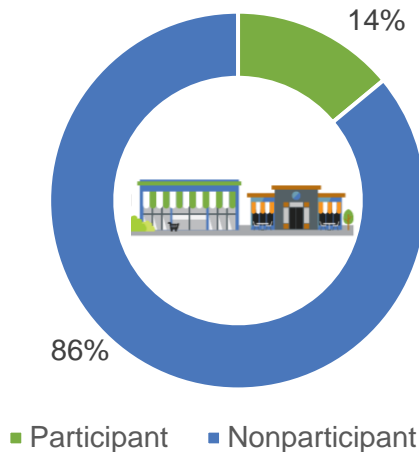


Energy-efficiency and demand-response programs (cont.)

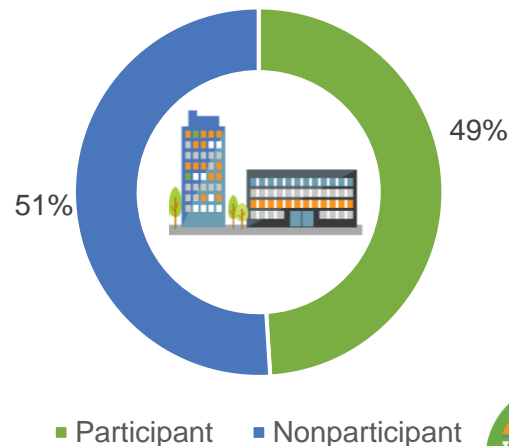
Total
(n = 3,102)



SMB
(n = 1,862)



Large
business
(n = 1,240)



Energy-efficiency and demand-response programs (cont.)

Q: What are reasons business customers participate in programs, and what do they consider barriers?



Energy-efficiency and demand-response programs (cont.)

Q: What are reasons business customers participate in programs, and what do they consider barriers?

A: Top reasons for and barriers to participation:

Motivations:

- Rebates or financing
- Return on investment or payback
- Reduce maintenance

Barriers:

- No budget
- Up-front costs too high
- Incentives not robust enough



Communication preferences

Preferred channels for communicating with their utilities on topics like:

- Analyzing energy consumption and usage
- Asking a customer service question
- Checking the status of an outage or disruption
- Enrolling in a program or service
- Learning about programs and services
- Learning about rate changes
- Paying a utility bill
- Reporting an outage or disruption
- Viewing account status and bill



Ask E Source

Communication preferences (cont.)

Q: How should we communicate upcoming rate changes to our business customers?

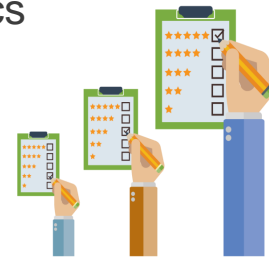
A: At least **half** of business customers want an email, but this differs by size and sector. A sizeable proportion of customers want to discuss rate changes **in person**.



Interest in non-energy-efficiency offerings

Interest in purchasing or participating in the following utility-provided products or services:

- Battery storage system
- Building surge protection insurance
- Carbon offsets
- Combined heat and power or cogeneration
- Diesel backup generator
- Electric commercial cooking
- Electric forklift
- Electric vehicle charging station
- Energy-management consulting
- Energy-management control systems
- Energy-management portal
- Fault detection and diagnostics
- Green power
- HVAC system
- Major business appliance insurance
- Microgrid
- Outdoor lighting installation or maintenance
- Power monitoring
- Preventive maintenance diagnostics
- Rooftop solar
- Wiring protection insurance





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Online data dashboard




Online data dashboard (cont.)


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An E Source Technology Assessment Service Offering

Andrea Salazar
May 3, 2018

Trying to ensure you have the right measures in your portfolio? Brainstorming new measures or emerging technologies? Working on an R&D project or roadmap? Our past experience helping utilities with these efforts, and our national perspective, ensures you use best practices to meet your goals.



Using Journey Analytics to Create Utility-wide Efficiencies

Jay Harbers

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Online data dashboard (cont.)

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Business size

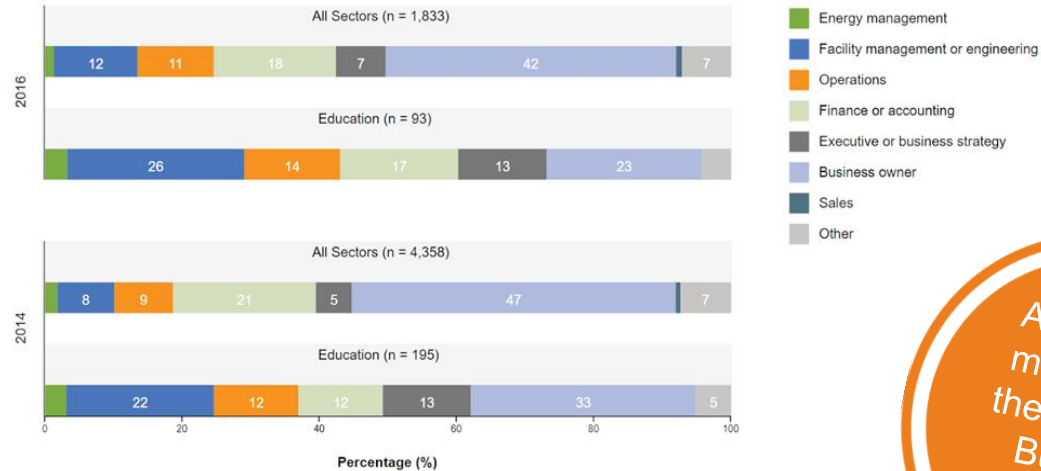
Small business

Sectors

- ☒ All Sectors
- ☐ Agribusiness
- ☐ Congregations or houses of worship
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- ☐ Governmental or public administration
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Primary role or responsibility (Small business)

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Available to members of the E Source Business Marketing Service

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Every Friday, we'll send an email alert if we've published new content that matches the topics you've selected.

Business Account Management

Select all ☐

- ☐ Account management
- ☐ Advisory panels

Customer Care

Select all ☐

- ☐ Billing
- ☐ Contact center
- ☐ Credit & collections
- ☐ Customer information systems
- ☐ IVR

CX Strategy

Select all ☐

- ☐ Customer experience
- ☐ Customer journey mapping
- ☐ Customer satisfaction
- ☐ Voice of the customer

DSM Programs

Select all ☐

- ☒ Behavioral
- ☐ Commercial

Marketing & Communications

Select all ☒

- ☒ Brand & reputation
- ☒ Communications
- ☒ Event outreach
- ☒ Marketing
- ☒ Segmentation
- ☒ Social media

Technology

Select all ☒

- ☒ Building controls
- ☒ C&I equipment
- ☒ Electric vehicles
- ☒ Emerging technology
- ☒ Home energy management
- ☒ HVAC & refrigeration
- ☒ Lighting
- ☒ Load management
- ☒ Metering & monitoring
- ☒ Plug loads
- ☒ Solar

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- ☒ Business Customer News
- ☒ DSM News
- ☒ Events Newsletter
- ☐ JourneyHub News
- ☒ Residential Marketing News
- ☐ Solar Strategy News
- ☒ Tech News

Other Periodic Communication

- ☒ E News
(Monthly newsletter for utilities, with insights, observations, and information about the energy industry)
- ☒ E Source Conferences
(Periodic emails about upcoming E Source conferences)
- ☒ E Source Offerings
(Periodic emails about E Source products and services)
- ☒ Market Research Insights
(Monthly newsletter featuring recent E Source market research results and upcoming studies)



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Through our Ask E Source service, you can ask our experts questions related to any of the subject areas your organization has access to. Our research can help you when you're making recommendations to senior leadership, building a presentation, or simply needing industry insight and analysis. We provide up to two hours of research for each inquiry. Still have questions? See our [FAQ page](#), or you can call us at 1-800-ESOURCE or [send us an email](#).

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Your Answers

- ✔ Segments considering purchasing an EV
- ✔ Communication channel preferences - Community solar
- ✔ Community solar customer acquisition costs
- ✔ Green community program
- ✔ Similar-sized utilities, new program opp
- ✔ AMI roll-out communications
- ✔ Green pricing program landscape scan
- ✔ Community solar segmentation and channels
- ✔ EV workplace charging

Business marketing research

(Please note that some links are only available with certain E Source memberships.)

Recent research:

- [SMB Marketing and Engagement](#), Travis Provin, Kim Burke, Katie Ruiz, E Source (2017)
- [Trade Ally Engagement: An Actionable Plan](#), Jordan Whiddon, Katie Ruiz, Kim Burke, E Source (2018)
- [Reaching Customers Who Operate Indoor Agriculture Facilities](#), Bryan Jungers, E Source (2018)
- [Are You Making the Most of Your Email Newsletter?](#) Jessica Bailis, E Source (2018)

Upcoming research:

- Business Customer Interest in Products and Services (June 2018)
- Driving Home the Demand for Electric Vehicles at Multifamily Residences (June 2018)
- 2018 Utility Business Marketing Survey (July 2018)
- Marketing Strategies for Commercial Programs Beyond Lighting (August 2018)

Upcoming online networking and events

Networking



(Please note that some links are only available with certain E Source memberships.)

Teach Your Marketing Department to Work Smarter, Not Harder: Peer Sharing Call

July 17, 2018 | 2:00 p.m. ET

Innovative SMB Marketing Strategies: Peer Sharing Call
August 14, 2018 | 2:00 p.m. ET



Upcoming in-person networking and events

Networking



E Source MarCom Boot Camp

June 26 to 28, 2018 | Boulder, Colorado

Fall 2018 E Source Utility MarCom Executive Council

September 24 to 25, 2018 | Denver, Colorado

E Source Forum 2018

September 25 to 28, 2018 | Denver, Colorado



For more information



Luke Currin

Senior Manager, Marketing and Communications, E Source

303-345-9111 luke_currin@esource.com



Rachel Cooper

Lead Analyst, Market Research, E Source

303-345-9117 rachel_cooper@esource.com

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Focus on Marketing:
June 26–28, 2018
October 23–25, 2018

Focus on DSM:
May 15–17, 2018
June 19–21, 2018
July 17–19, 2018

Focus on CX:
June 12–14, 2018



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Questions?

