

# Using Data to Drive Your Residential Marketing Decisions

## Introducing a New Interface and Sharing Data Insights



**E Source**

**Luke Currin**  
Senior Manager, E Source

**Rachel Cooper**  
Lead Analyst, E Source

# 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](mailto:luke_currin@esource.com)



Rachel Cooper

Lead Analyst, Market Research, E Source

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# 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



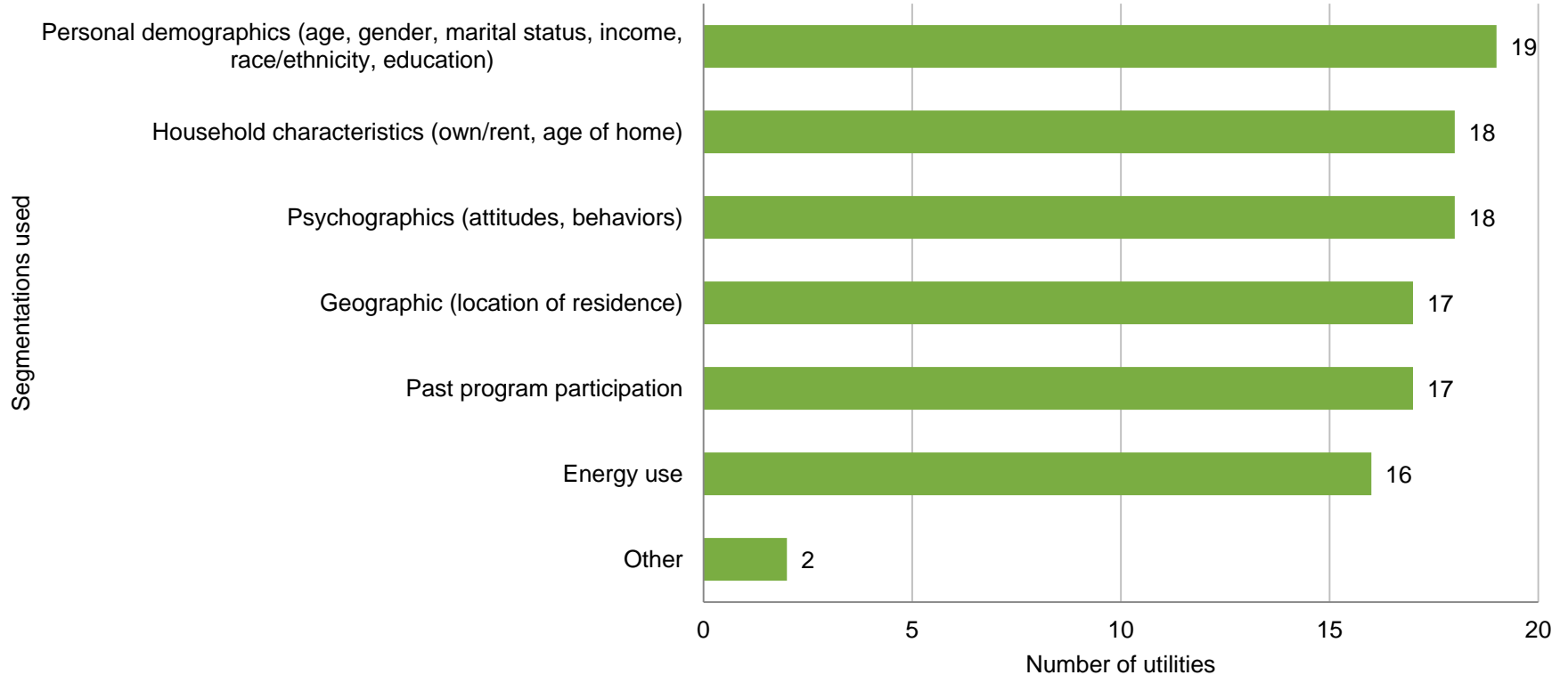


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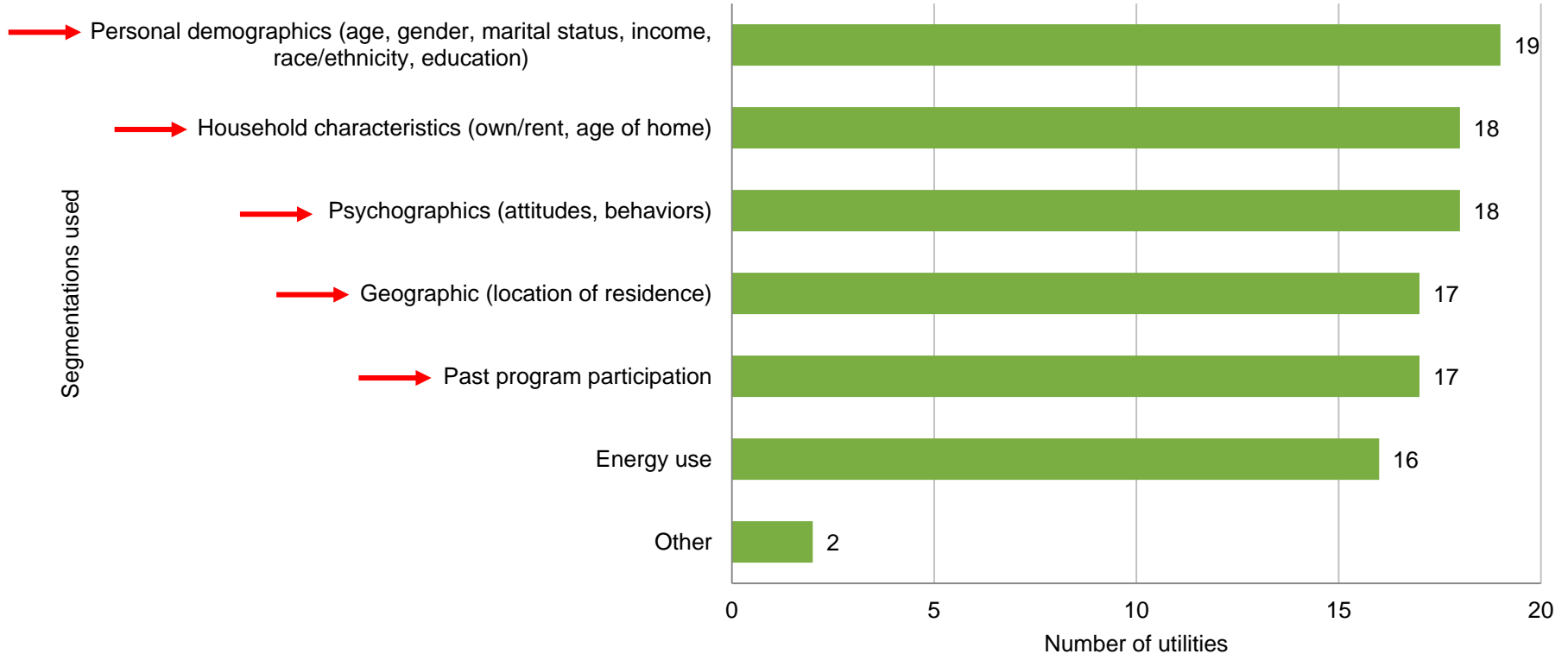
### Residential customer segmentation



**Base:** Participants who segment their residential customer, n = 19. **Question S3\_4b:** How do you segment your residential customers? (Select all that apply.)

© E Source (2018 Utility Marketing Survey)

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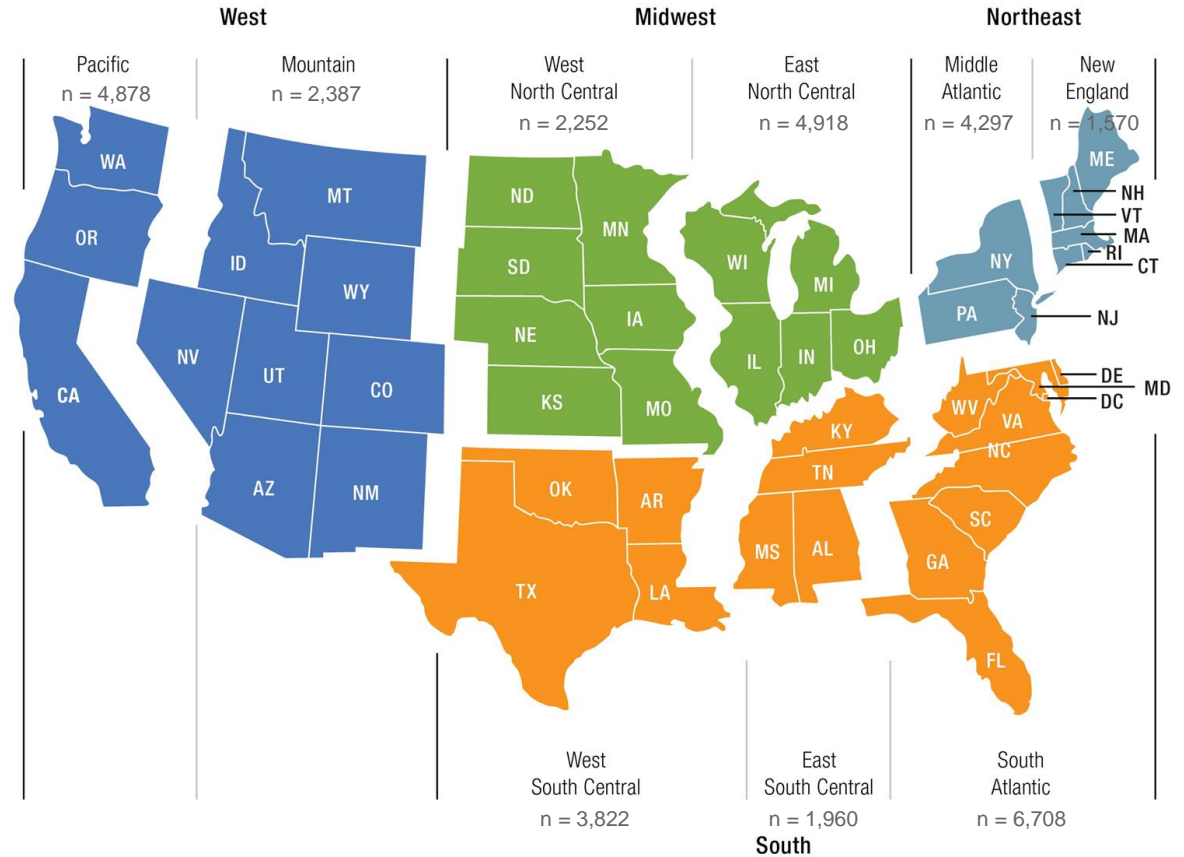
# Survey methodology

Data are drawn from the Claritas Energy Behavior Track survey:

- Annual, online survey with approximately 32,000 residential customers in the US
- Households are chosen from Survey Sampling International and Critical Mix
- Fieldwork quotas are set to ensure that the sample is representative of the national population
- A postfieldwork weighting scheme is applied using geographic and demographic data



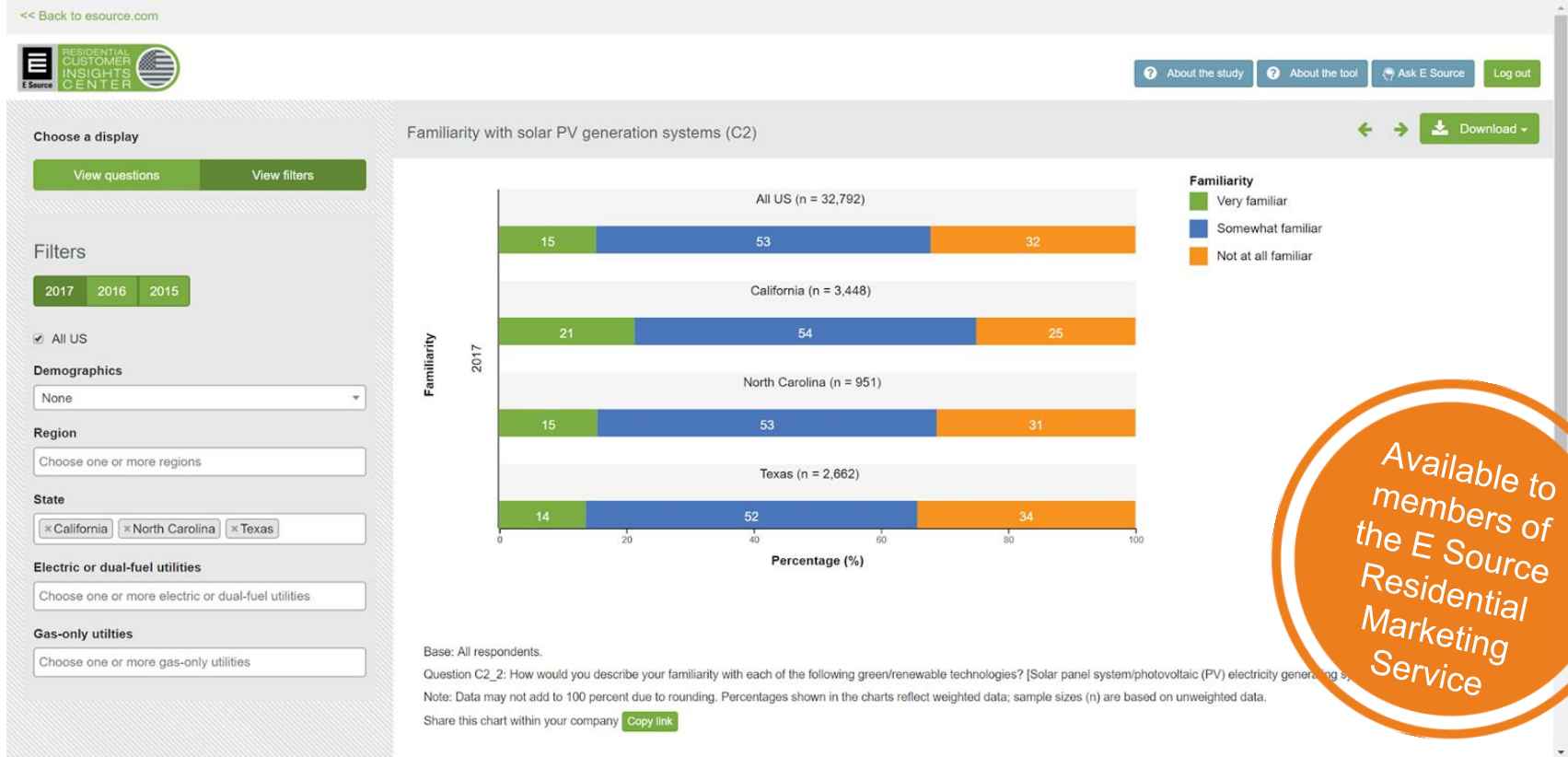
# Sample sizes 2017



Note: The Pacific division includes Alaska and Hawaii, which are not shown here.

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# The dashboard





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# Online activity

How customers are engaging with you online for:

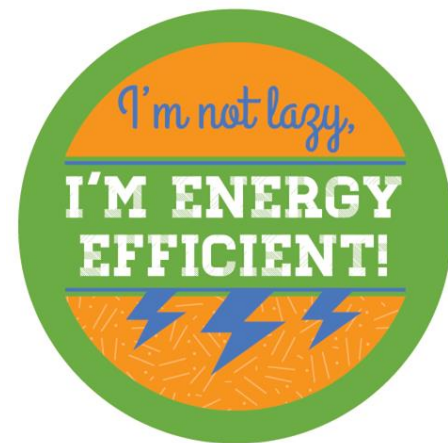
- Establishing service
- Signing up for alerts
- Viewing bill and account status
- Reporting outages and checking status
- Applying for rebates
- Enrolling in energy-efficiency programs
- Searching for and purchasing products or services
- Scheduling and checking the status of service appointments
- Submitting customer service questions and chatting with online reps



# Energy-efficiency and demand-response programs

You'll find customers' participation rates in and their likelihood to recommend demand-response, energy-efficiency, and other green programs such as:

- Appliance rebate
- Carbon offset
- Duct test and repair
- Equipment rebate
- Green energy
- HVAC inspections and maintenance
- Home energy report
- Household appliance recycling
- Lighting rebate
- Online energy audit
- Weatherization service
- Whole-house audit



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

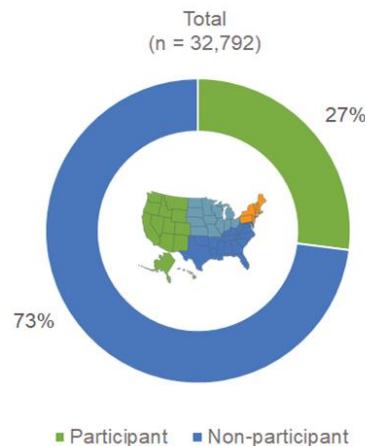
Q: What proportion of US customers have participated in at least one of these programs in the past year?



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

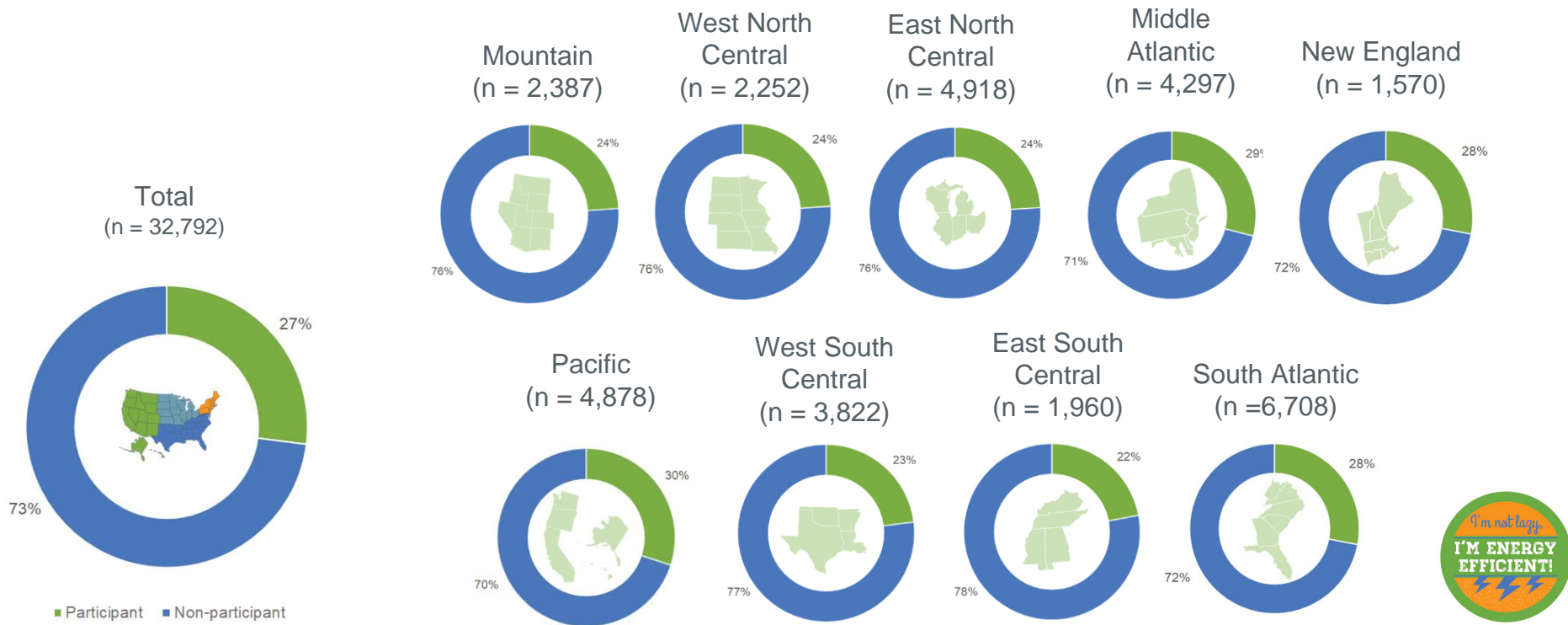
Q: What proportion of US customers have participated in at least one of these programs in the past year?

A: **27%** of US customers tapped into these programs in the last 12 months.



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

Ask E Source



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

Q: We're reviewing our energy-efficiency portfolio and wondering if there are other high Net Promoter Score (NPS) programs we should consider. Which ones typically come out on top?





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

Q: We're reviewing our energy-efficiency portfolio and wondering if there are other high Net Promoter Score (NPS) programs we should consider. Which ones typically come out on top?

A: Lighting rebates and appliance recycling top the NPS charts nationally.

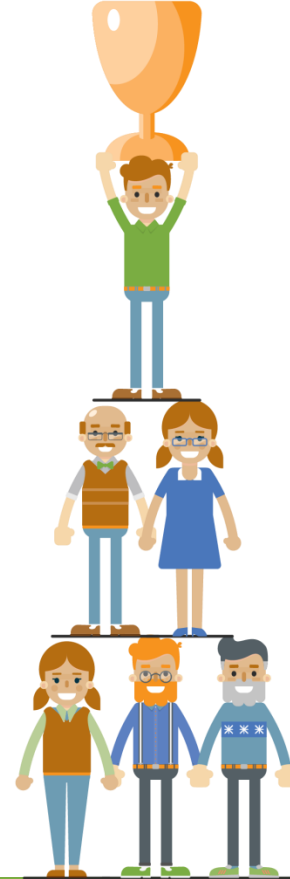
	Average NPS
Lighting rebates	42.3
Appliance recycling	38.7



# Brand health, customer satisfaction and NPS

Customers' overall satisfaction with and views on their utilities:

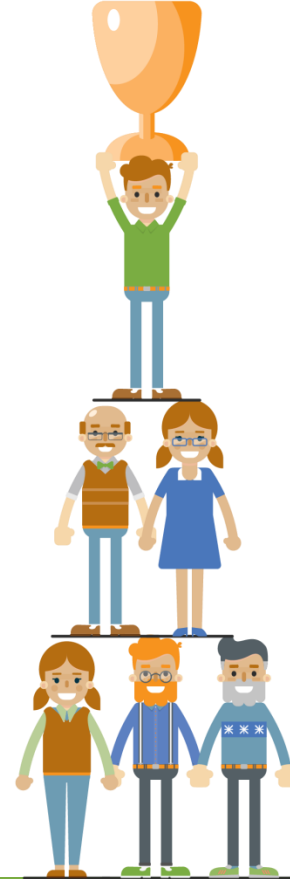
- Trustworthy
- Customer focused
- Community focused
- Environmentally focused
- Quality focused
- Safety focused
- Provides reliable service
- Communicates effectively
- Helps manage energy consumption
- An energy-efficiency expert
- Offers relevant programs and services
- Offers better rates than other electricity/natural gas providers
- Innovative
- Has a positive image



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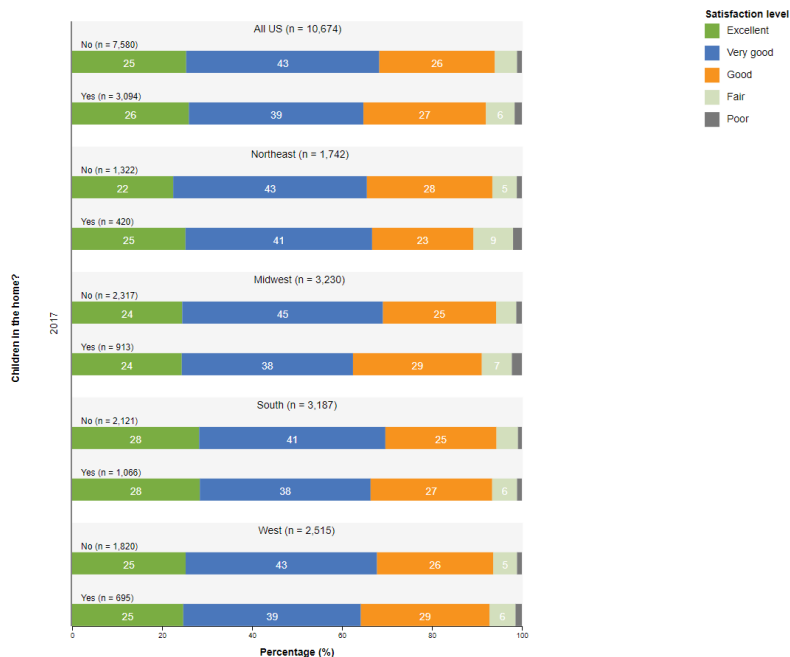
# Brand health, customer satisfaction and NPS (cont.)

Ask E Source

Q: Do customers with children in the home have different satisfaction levels with their natural gas utilities than those without children?



# Brand health, customer satisfaction and NPS (cont.)



Q: Do customers with children in the home have different satisfaction levels with their natural gas utilities than those without children?

A: It depends on where you are, but across the US as a whole, customers with children in the home are more likely to give less-satisfactory ratings than customers without children in the home. This is a great opportunity to dig deeper to understand messaging.



# Brand health, customer satisfaction and NPS (cont.)

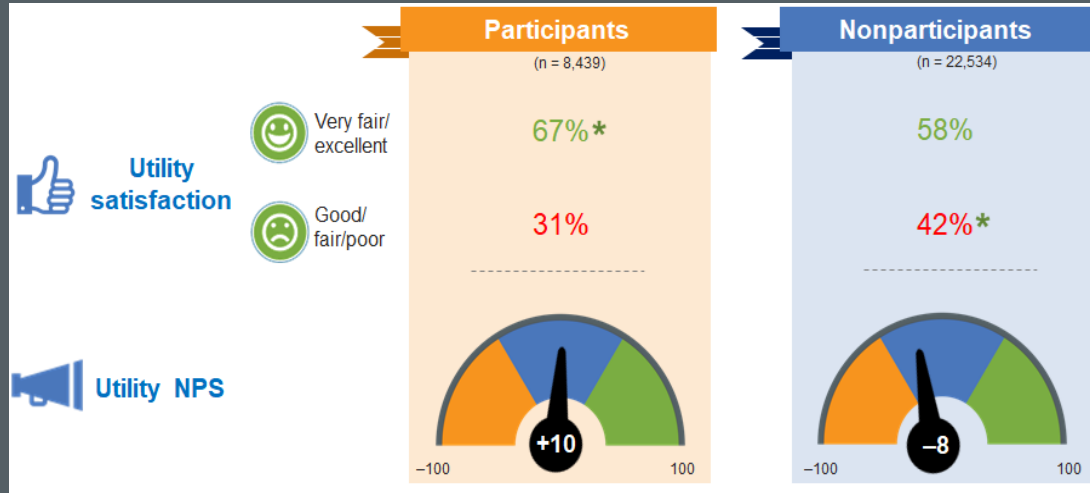
Q: How much does participation in energy-efficiency and other green programs affect customer satisfaction and NPS?



# Brand health, customer satisfaction and NPS (cont.)

Q: How much does participation in energy-efficiency and other green programs affect customer satisfaction and NPS?

A: On average, it's a **9%** customer satisfaction boost and a positive NPS.





# Solar opinions and preferences

Customers' views on solar and general renewable policies, including:

- Familiarity with photovoltaic (PV) systems
- Stage of PV system purchase
- Interest in community solar
- Net metering opinions
- Preferred solar providers
- Barriers to solar panel installation
- Opinions about solar site locations
- Willingness to pay
- Opinions about renewable energy



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# Solar opinions and preferences (cont.)

Q: What proportion of renters in the South are interested in community solar? Is it much different than in other regions?



# Solar opinions and preferences (cont.)

A: **45%** of renters in the South rate their interest in community solar at a **9 or 10** (out of 10).

This is similar to the US renters average of **44%**.

Q: What proportion of renters in the South are interested in community solar? Is it much different than in other regions?



# Solar opinions and preferences (cont.)

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# Solar opinions and preferences (cont.)

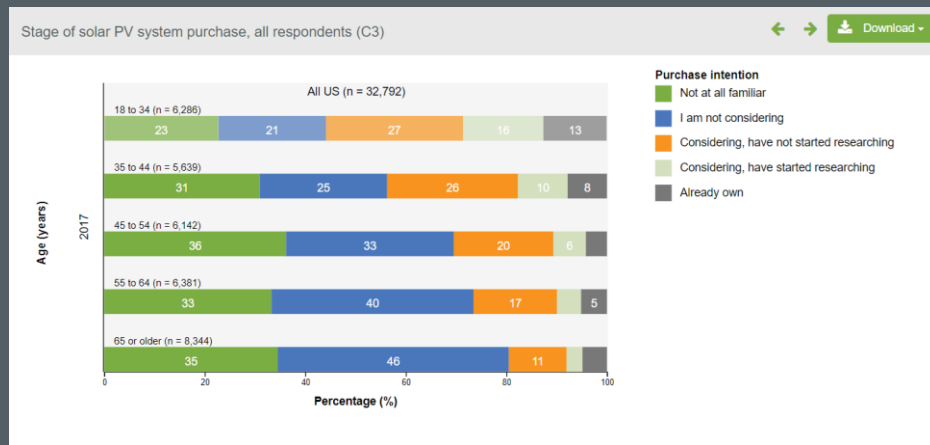
Q: How big of a role does age play in customers' intent to purchase solar?



# Solar opinions and preferences (cont.)

Q: How big of a role does age play in customers' intent to purchase solar?

A: Your earliest solar customers may have been older, but younger customers are headed for a solar future.





# Connected home and technology

Customers' relationships with and interest in emerging technologies, including data points like:

- Home energy management system familiarity and stage of purchase
- Electric vehicle familiarity and stage of purchase
- Battery storage familiarity and stage of purchase
- Thermostat type



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# Connected home and technology (cont.)

Ask E Source

Q: How many customers report having a smart thermostat?

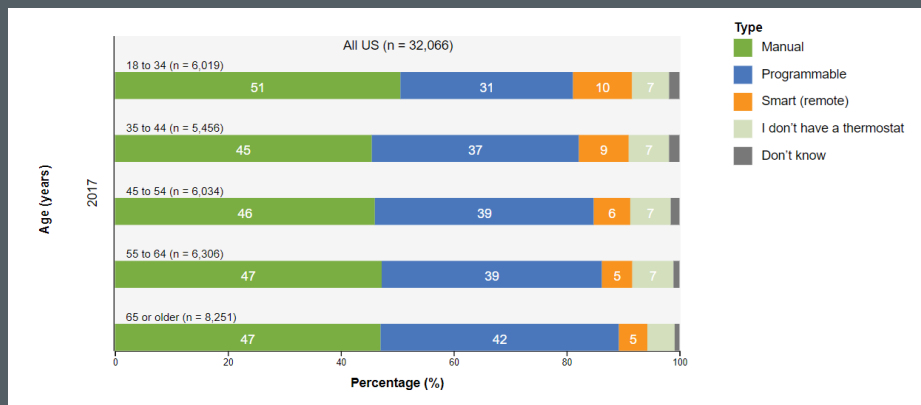


# Connected home and technology (cont.)

Q: How many customers report having a smart thermostat?

A: **7%** of US customers report having a smart thermostat.

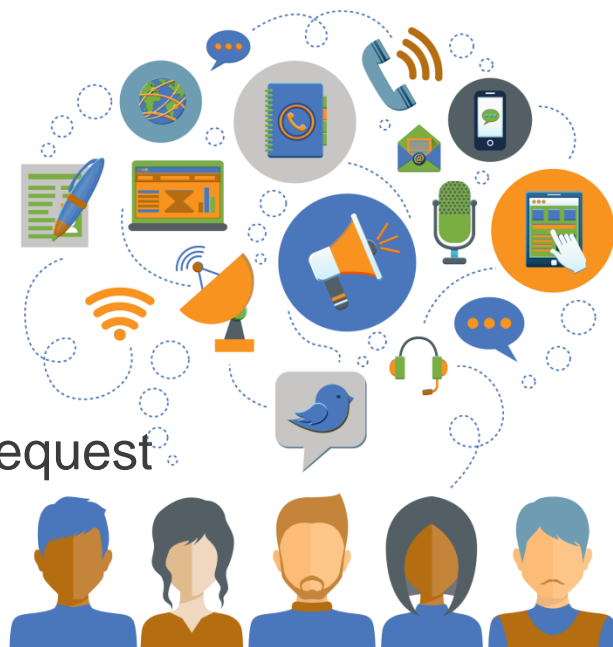
Adoption differs by age.



# Communication preferences

Preferred channels for communicating with their utilities on topics like:

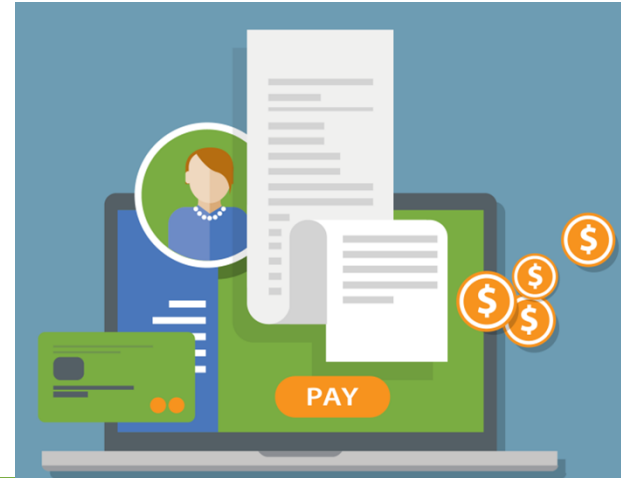
- Learning about new products and services
- Reporting an outage
- Newsletters
- Establishing service
- Bill alerts
- Scheduling and checking status of a service request
- Energy-efficiency information
- Ordering new products



# Billing, payment, and energy costs

Views into customers' billing, payment, and energy cost experiences and preferences such as:

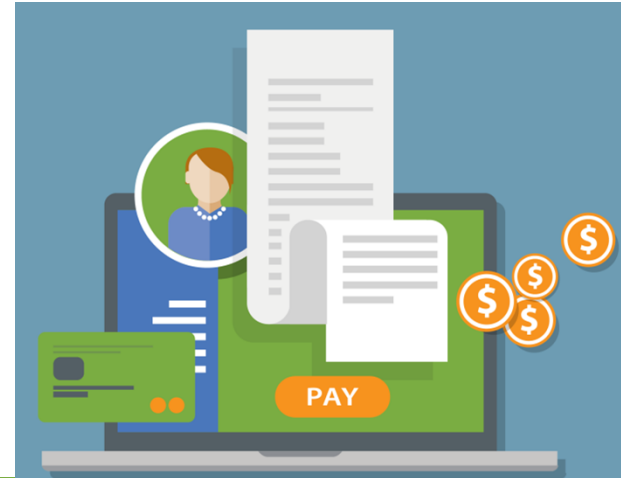
- Past bill payment channels they've used
- Preferred bill payment channels
- Self-reported monthly summer and winter bills
- Online bill alert sign-ups
- Preferred bill alert channels
- Current rates they're signed up for
- Email bill delivery sign-ups
- Online bill/account status viewing
- Learning about billing changes



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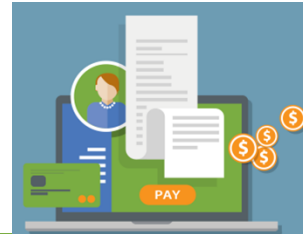


# Billing, payment, and energy costs

## (cont.)

Ask E Source

Q: How interested are millennial customers in paying their bill through a mobile app or other digital channels?





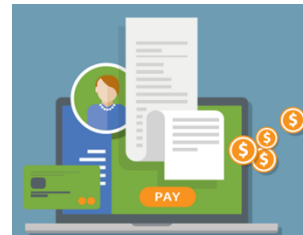
# Billing, payment, and energy costs

## (cont.)

Q: How interested are millennial customers in paying their bill through a mobile app or other digital channels?

A: Although only **5%** of customers age 18 to 34 have paid their utility bill through a **mobile app** in the past year, **15%** would prefer to.

Also, **16%** would prefer to pay via **text** and **5%** through **social media**.



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# Online data dashboard



# Online data dashboard (cont.)

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Boulder, Colorado




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Andrea Salazar  
May 3, 2018

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#### Using Journey Analytics to Create Utility-wide Efficiencies

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Submit your ads by May 18, 2018.


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# Online data dashboard (cont.)

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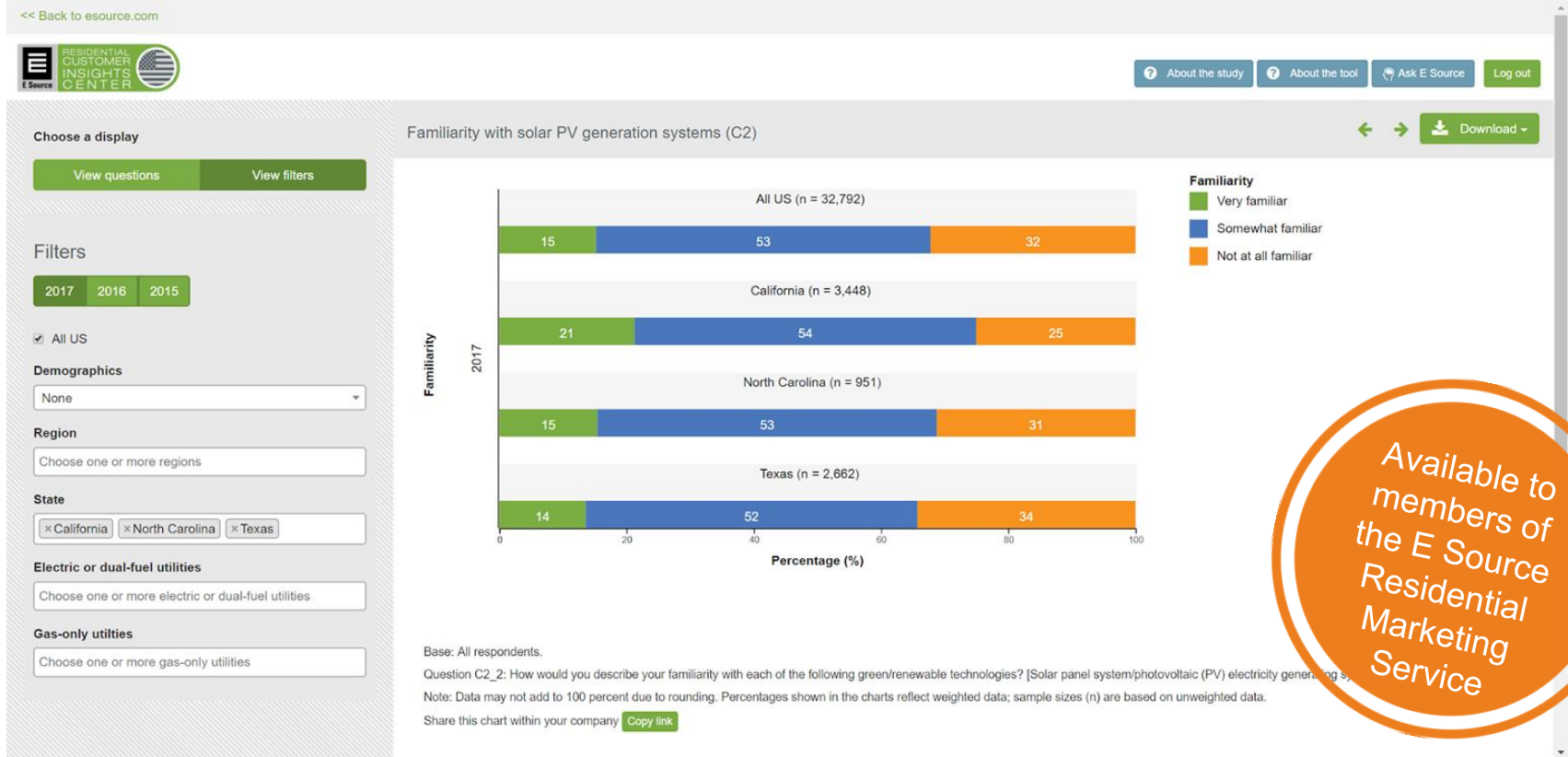
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Available to  
members of  
the E Source  
Residential  
Marketing  
Service



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## Choose Your Topics

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  
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- ☒ E Source Conferences  
*(Periodic emails about upcoming E Source conferences)*
- ☒ E Source Offerings  
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Ask your question now

See if we've answered this question

## 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

# For more information



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**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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September 25–28

Sheraton Denver  
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[www.esource.com/forum2018](http://www.esource.com/forum2018)

# Questions?

