



saveONenergy Bi-Weekly Update

February 6, 2012





Meet the Presenters



Rouselle Gratela
Training Specialist



Robert Edwards
Business Manager,
Private Sector



Sandra Joy
Manager, Marketing
and Awareness



Erinn Meloche
Research Specialist



Today's Agenda



1. saveONenergy Update
 - Upcoming Webinars Schedule
 - Getting Down to BUSINESS Workshop – Hold the Date!
 - PAB Funding Expense Report
2. 2012 Marketing Strategy
3. Residential Segmentation Update



Upcoming Webinars



Date	Webinar Topics	Duration	Time
Wed. Feb 22	saveONenergy Update <ul style="list-style-type: none">○ Residential Demand Response Research○ DIRECT INSTALL LIGHTING Eligibility Clarification	60 mins	10:00 am – 11:30 am



Getting Down to BUSINESS

Save the Date!



- New date on March 8th
- Will feature:
 - saveONenergy business programs update
 - An all day opportunity to learn about the many issues relating to programs management
 - Understanding the application process
 - Updates from the C&I Working Group
- Venue, itinerary and registration link to be announced shortly
- **We want to hear from you! Tell us your top 3 topics you would like to see covered.**



PAB Expense Report Walkthrough

- LDCs are required to submit a PAB Expense Report by February 28th
- See January 20th LDC E-Blast





2012 Marketing Update

Sandra Joy, Manager, Marketing and Awareness



Agenda

1. Consumer Segmentation Overview
2. 2012 Campaign Strategy
 - Media & Creative Objectives
 - Media Calendar
 - Marketing Standards
3. COUPON EVENT
 - OPA Advertising
 - LDC Local Outreach
4. Business
 - Case Studies
 - Creative Direction
5. **peaksaver PLUS[®]** Strategy
 - OPA Marketing
 - LDC Marketing
 - Customer Experience
 - Toolkit Overview
 - LDC Checklist
 - Upcoming RDR Events
6. Important Reminders
7. Questions

Marketing Strategy

Objective

- To continue to provide the LDCs with guidance and support for the delivery of the 2011 – 2014 CDM Province Wide marketing in accordance with the April 23rd Directive, while facilitating local marketing approaches as per regional conditions

2012 Evolution

- To continue building on the success of the 2011 creative (saveONenergy achieved awareness levels of > 40%) while creating opportunities for optimizations as follows:
 - to offer more flexibility to LDCs
 - to create more differentiation amongst initiatives
 - to work within mediums appropriately to ultimately drive participation and foster a culture of conservation
 - to move customers further along the decision making path to interest to drive increased participation

How will we do this?

- Optimize the effectiveness and efficiency of our marketing investment we will continue to ensure a **consistent brand experience across all marketing and customer touch points**
- Evolve our creative to allow for more customization locally
- Provide a second level of templates similar to the 3 options available to the LDCs for web
- Take OPA conservation messaging to the next level in explaining the “Value of Conservation for Ontario and Ontarians” and create opportunities for LDCs in using this messaging locally

What must we remember?

- The marketing provisions of the Master Agreement remain in place
- We observe the Ministerial Directive of April 23rd 2010 requiring Strategic Co-ordination through :
 1. A common Provincial brand, co-branded with the LDCs marks
 2. Consistent Program messaging

One additional requirement as requested by the LDCs:

3. Campaign coordination (province wide and local)

New for 2012

- 1. Improved customization / “localization” opportunities**
- 2. Optimized customer intelligence**
- 3. Embedded strategic messaging on “value of conservation”**

Who does what?

- The OPA province-wide advertising will focus on continuing to build awareness and context for a foundational understanding of “why” conservation Ontarians.
- The OPA & LDC advertising will focus on program level (FOR HOME and FOR BUSINESS) level messaging
 - Make it easy for people and businesses to learn what to do to change energy use, to *save money, increase comfort, feel good* about their impact on the environment and energy supply
- The LDC local outreach should focus on personalizing the opportunity and managing the customer experience with conservation.

Improved Customization / Localization

- There will be three options of creative customization the LDCs can select from when marketing the saveONenergy programs:
 - **OPTION 1: Basic Templates**
 - Minimal customization with LDC Logo and call to action
 - **OPTION 2: Enhanced Templates**
 - Enhanced opportunity for utilities to customize templates with messaging and branding
 - More flexible templates LDC Logo, Content & Branding
 - All custom inserted photos and content must be relevant, complete and accurate
 - **OPTION 3: Custom Materials**
 - As per section 2.3 b VI of the Master Agreement all LDCs have the option to create materials outside of the Marketing Standards
 - LDCs will incorporate the required creative thread components within the context of their own materials to leverage the province-wide advertising while maintaining their own corporate branding and market positioning

2012 saveONenergy Marketing

- **2011 was a successful year for the newly launched saveONenergy brand by exceeding a 50% public awareness and establishing the saveONenergy programs / initiatives with LDCs and consumers**
- **2012 we will build on this success with continued market presence of the saveONenergy programs AND evolve the discussions with consumers in addressing the “value of conservation / electricity” theme**

2012 saveONenergy Campaign Approach

saveONenergy
Awareness
Campaign (OPA
province wide)

New Messaging
“The WHY”
introduce
**Value of
Conservation /
Electricity**

I. General Awareness Messaging (OPA)

Mass Media, Provincial Website, PR/Social media

*Finalize strategy & media approach;
Awareness campaign to start in April
with existing TV spot “Snapshots”,
prior to the evolved awareness
messaging implementation*

New awareness messaging implementation starting in Q2

Q1

Q2

Q3

Q4

saveONenergy
Initiative-based
Advertising (OPA
province wide &
LDCs locally);

“The HOW / WHAT”

Explains how to
participate in
initiatives and the
immediate benefits
“what’s in it for me”

II. Initiative - level Messaging (OPA & LDCs)

Spring/Fall Event	Spring/Fall Event
Fridge & Freezer Pickup	Fridge & Freezer Pickup
Heating & Cooling Incentive	Heating & Cooling Incentive
peaksaver PLUS*	peaksaver PLUS*

Direct to Customer (LDCs) – bill inserts, flyers, local events

Summary of 2012 Media & Creative Objectives

2012 OBJECTIVES / PROGRAMS	CONSUMER	BUSINESS
MEDIA	<ul style="list-style-type: none"> › Reach – Generate awareness of the various conservation initiatives available to consumers 	<ul style="list-style-type: none"> › Establish awareness about saveoneverygy.ca and the different programs available for each sector.
	<ul style="list-style-type: none"> › Maintain presence – Keep energy savings top of mind throughout the year. 	<ul style="list-style-type: none"> › Develop and increase sector based communications.
	<ul style="list-style-type: none"> › Leverage TV radio, print, outdoor (out of home), online and search engine marketing 	<ul style="list-style-type: none"> › Maintain year round advertising presence to promote programs - February through December › Leverage radio, print and online (search engine marketing)
CREATIVE	<ul style="list-style-type: none"> › Leverage program creative and enhance as required 	<ul style="list-style-type: none"> › Enhance targeted sector approach by leveraging program participant to showcase leadership.
	<ul style="list-style-type: none"> › Improve messaging to educate consumers on the benefits of energy conservation 	
	<ul style="list-style-type: none"> › Develop additional customer engagement tools delivered via the website, and LDCs 	<ul style="list-style-type: none"> › Implement a case study based approach to engage organizations that seek best practices, follow management trends and benchmark against the competition.
	<ul style="list-style-type: none"> › Layer the communication with the addition of the “Why” Conservation awareness messaging 	

2012 Consolidated Media Blocking Chart

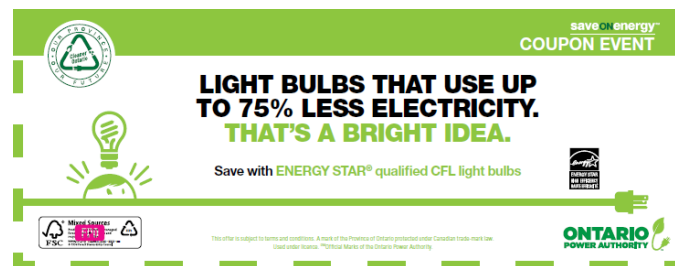
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Marketing Standards

- Currently being updated to reflect the three Options
- Will include ***peaksaver PLUS*** branding
- Will incorporate other feedback from LDCs on usability
- Continue to use existing standards until the revised standards are available

saveONenergy COUPON EVENT

- OPA Advertising
 - The OPA will run two 3 week campaigns, in April and October, in support of the in-store events.
 - The campaigns will include radio (English/French), print, online.
 - The OPA will develop in-store point-of-purchase (POP) materials for retailers.
 - Online coupons saveONenergy website
 - LDCname.saveonenergy.ca/couponevent
 - Central call centre support - **1- 877- 797- 9473**



saveONenergy COUPON EVENT

Item	Purpose	Language
Bill Insert template	For LDC <u>customization</u> and distribution locally. To drive customers to the retailers during the event.	English
Brochure template	For LDC <u>customization</u> and distribution locally at events.	English /French
Product Knowledge Guide	For LDC <u>local training</u> of support staff. who will be at local retail stores during the event.	English

Business Advertising Objectives


- Increase program **awareness** in all sectors
- Increase program **participation**
- Create a **sector based** advertising strategy
- The audience is a diverse group of managers, owners and technical experts. We need to **speak to them**
- Energy efficiency is a “**nice to have**” – not a priority
- We need business people to think these **programs are relevant** and worth looking into.

Business Case Studies

Sector	Program	Business	LDC
Small Business	Power Savings Blitz	RNR Custom Cycle -Motorcycle shop	Horizon
Commercial	DR3	Exhibition Place	Direct Energy
Industrial	ERIP	Airliquide – Air separation plant	Horizon
Industrial	ERIP & DR3	Owens Corning – Glass fibre plant	Guelph Hydro
Industrial	ERIP	Ropak Packaging	Oakville Hydro
Institutional	ERIP	Hotel Dieu	Kingston Hydro
Institutional	ERIP	St. Thomas Hospital	St. Thomas Energy
Institutional	ERIP	University of Guelph	Guelph Hydro
Institutional	ERIP	University of Windsor	Enwin Utilities

Business Case Studies

- OPA continues to provide support to LDCs in developing and writing of case studies
- Send us an email to ldc.support@powerauthority.on.ca – please include “Business Case Study” in the subject line



save energy
FOR BUSINESS



Guelph motorcycle shop reduced electricity costs and improved bottom line

CASE STUDY

RNR Custom Cycle Ltd.

PROJECT STATS

- Lighting retrofit
- Reduced monthly electricity costs by more than 10 per cent, also improved lighting quality in the showroom.
- Incentive: \$1,000



PROJECT
Motorcycle customizer RNR Custom Cycle Ltd. used a \$1,000 Power Savings Blitz grant from the Ontario Power Authority and Guelph Hydro to upgrade its workshop lighting and cut its electricity bill by more than 10 per cent a month.

BACKGROUND
When Guelph's RNR Custom Cycle, which has been customizing motorcycles since 1994, purchased its current building in 2006 its focus was on building a new showroom that would appeal to its customers.
Since some of the company's customers bring their bikes from California, B.C. and Montana, "We wanted the trip to be a special experience," says Francis McNabb, RNR's co-owner. "We installed energy efficient lights to give the showroom a brighter, cleaner look and keep our costs low."
But building the new showroom meant RNR couldn't afford to upgrade the adjoining workshop. "Because we invested in making the showroom the focus for our customers, we had to forgo replacing the old inefficient lights in the workshop," Ms McNabb says.
Customers are not allowed in the workshop for safety reasons so replacing the workshop lighting was not a priority. "Many of the bikes we are working on are worth tens of thousands of dollars, so we can't take any risks," she says.

Creative Direction – Case Study Approach

- Targeted sector based approach featuring case studies of participants

The advertisement is a promotional flyer for the 'save on energy™ FOR BUSINESS' program. It features a green header with the program name and a circular logo on the left that says 'CLEAN & PROGRESSIVE' around a central 'Clean Energy' icon. The main body is divided into three sections: a portrait of a man in a suit in a store aisle, a photo of modern lighting fixtures, and a quote box. The quote box contains the text: "Converting to energy efficient lighting saved Sears Canada \$1 million last year." Below these images is a large green banner with the text "Join over 100,000 businesses saving money by saving energy." and a plug icon. A large, semi-transparent 'DRAFT' watermark is overlaid across the center. At the bottom, there is a paragraph of text explaining the program's benefits, including a 50% off cost of energy-efficient projects through a retrofit program. The footer includes the Ontario Power Authority logo and a small disclaimer.

**save on energy™
FOR BUSINESS**

“Converting to energy efficient lighting saved Sears Canada \$1 million last year.”

Join over **100,000** businesses saving money by saving energy.

A more energy-efficient future is now closer than ever for over 100,000 Ontario businesses. That includes big businesses like yours – because your local electric utility is offering you up to **50% off the cost of energy-efficient projects through a RETROFIT PROGRAM.** We can show you how to adopt newer, more energy-efficient solutions that will not only benefit your business, but all of Ontario.

Contact your local electric utility or visit saveonenergy.ca/business

Subject to additional terms and conditions found at saveonenergy.ca. Subject to change without notice.
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**ONTARIO
POWER AUTHORITY**

peaksaver PLUS®



Marketing Update

***peaksaver* PLUS[®] Description**

- This Initiative builds on the success of the *peaksaver*[®] program
- Includes more types of eligible appliances and the inclusion of a free CID which will provide participants with the ability to monitor their consumption and associated costs in near real time.
- Consumers enrol to have load control devices and customer information displays (CIDs) installed free of charge
- Consumers permit the control of the demand associated with eligible end use appliances – central air conditioners, electric water heaters, electric pool pumps
- By remotely activating eligible appliances, the province can reduce system electricity demand when it is at its highest – often on hot, humid days.

Customer Experience Management

- This is a complex program that will require segmentation and targeting of the offer to existing peaksaver participants and new Initiative participants.
- Customer Experience management will be key and we must take a multi disciplinary strategic approach that enables a consistent messaging experience across all touch points
 - KVPs for new and existing customers
 - CSR, Technicians, must maintain message consistency
 - Ongoing messaging regarding activations and use and programming of IHD to maintain customer engagement

OPA Marketing

- The OPA marketing will focus on creating awareness and context for Res DR and establishing a foundational understanding of the offer with Ontarians
- The OPA will provide LDCs with province-wide air cover support.
 - No broad based promotion of the initiative until Q2 when LDCs across the province are ready to offer the program
- The OPA will include Res DR program details on the Microsite and direct consumers to participating LDCs.
- OPA's advertising will be anchored in the provisions of the revised 2012 **Marketing Standards** document to ensure consistency of core elements between province wide efforts and the LDCs regional outreach.
- The OPA will facilitate the sub-licensing of the *peaksaver* & *peaksaver PLUS* brand
- The OPA will communicate all marketing and communications plan through iCon, including blocking charts, campaign overviews, radio stations and newspaper lists and creative templates for local implementation and alignment

LDC Marketing

- LDCs will manage initiative promotion locally by leveraging OPA provided templates or LDC developed customer materials to new participants.
- LDCs will manage initiative promotion targeted program promotion to existing participants through DM, E-blast etc.
- LDCs will cross promote this initiative with home owners who participated in other conservation initiatives
- LDCs will maximize opportunities to promote the initiative through community engagement and outreach efforts.

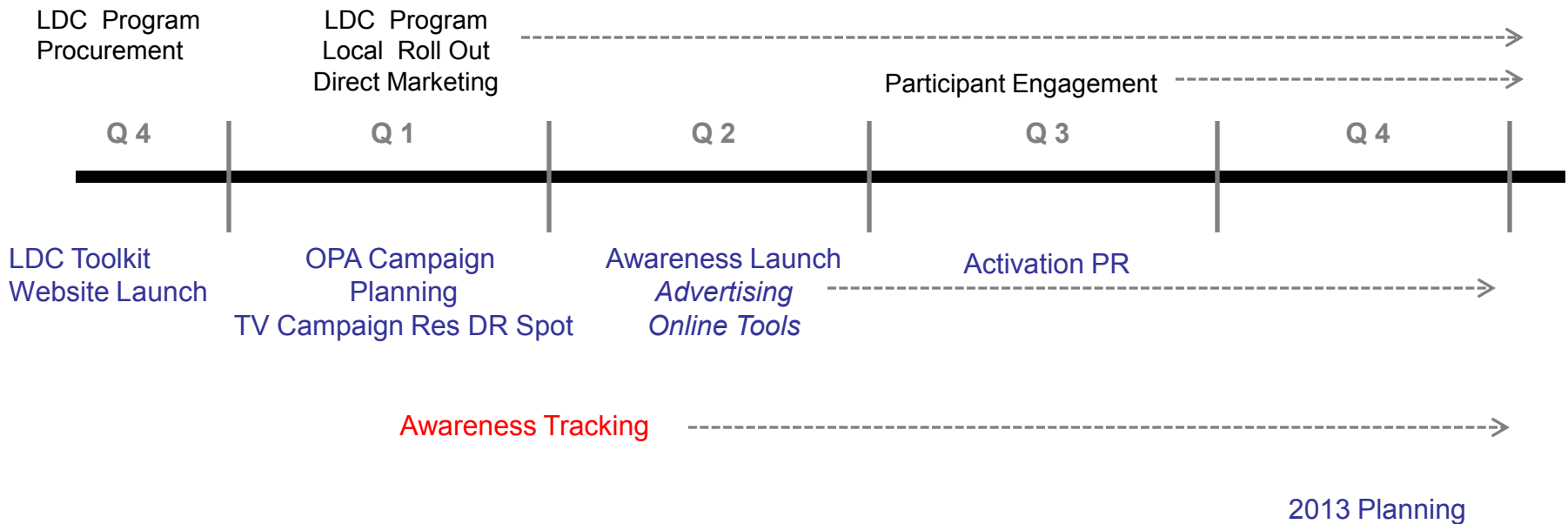
LDC Marketing

- Marketing efforts will vary by LDC depending on the following market characteristics in their jurisdiction
 - maturity of market (experience with or awareness of the *peaksaver* program)
 - prevalence of eligible measures
 - devices (load control & IHD) being rolled out and the resulting customer installation experience
 - PA status – are *peaksaver* participants “Continuing” or “Prior”

Offer & Promotion by Audience

Target	Offer	Promotion
New Participant	-signs new PA & receives Load control Device & IHD	OPA Province wide air cover – Radio, Online, SEM, PR Outreach
		LDC local marketing - Bill inserts, community engagement
Continuing Participant (valid participant agreement & working load control device)	– signs new PA & gets IHD	OPA provided tools to support direct to customer outreach by LDCs
		LDC direct to customer marketing & community outreach
Prior Participant (expired participant agreement & working load control device)	– signs new PA & gets IHD	OPA provided tools to support direct to customer outreach by LDCs
		LDC direct to customer marketing & community outreach

Promotion Timeline



LDC Toolkit Overview

Item	Purpose	Language
Creative Elements	For LDC development of local outreach materials for customers and use on presentations, web, and other materials as required. Will include core required elements.	English/French
Customizable Templates for New and Existing residential participants	For LDC customization and distribution locally. Will include DM, Bill Inserts, Print Ads, Online templates. (Expanded options for customization.)	English/French
Education Materials Templates	For use by LDCs as leave behinds for customers at time of installation. Will include an overview on the program and tips on how to leverage the IHD.	English/French
Updated residential FOR HOME Brochure	For LDC customization and distribution locally will now include a panel on Res DR to complete the FOR HOME offering.	English/French
Updated Marketing Standards	To support development of local materials. Will include Res DR update and reflect 2012 strategy.	English

LDC Toolkit Overview

Item	Purpose	Language
PR Toolkit	For LDC <u>media outreach</u> . Includes News Release, Quotes for LDC Use, Media Fact Sheet, Media Relations FAQ-QA.	English/French
Website Tools	Option 1 – LDC Logo for use with province-wide content. Option 2 - RES DR LDC Co-branding User Guide for updating microsite with local content Option 3 - Copy for LDC use on corporate websites.	English/French
LDC Marketing Strategy Guide for Res DR	For LDC <u>internal use</u> to support local outreach planning.	English
Call Centre Guide	For LDC <u>local training</u> of Call Centre and support staff. Providing a snapshot of Res DR from a Call Centre perspective will include Customer Screening template.	English

NOTE:

Specific materials for training of third party or internal resources responsible for sign-up, installation, ongoing customer interaction, troubleshooting, and maintenance. LDCs can leverage program and marketing materials to inform training of staff and vendors.

Microsite

- The customer will enter the saveONenergy website.
- They will click on the FOR HOME link on the landing page header bar, then PROGRAMS and select the Res DR initiative link on the left hand navigation.
- They will then view the OPA content with the option of entering their postal code and be redirected to the LDC microsite (or direct to the LDC corporate site for Option 3)
- Each LDC can customize the phone number or website that they would like to direct their customers to.
- LDCs can choose to put either their own contact information or that of a third party vendor which is running the initiative on their behalf.
- The customer will then contact the number and/or website provided to book an installation appointment.

LDC RDR Readiness

What	Why	When	Complete
<p>peaksaver PLUS Sub-License/ License Agreements</p>	<p>Without a signed agreement., an LDC does not have rights to use this brand in your marketing or on your website. The brand and guidelines will be release to you upon receipt of signed agreement. Note that peaksaver PLUS is not covered by the licensing provisions in the Master Agreement, hence the need for the separate sublicense</p>	<p>A.S.A.P (Due Jan/31/12)</p>	<input data-bbox="1734 411 1837 494" type="checkbox"/>
<p>Review the marketing provision (Section 2.3) of the Master Agreement and the Ownership and Licensing section (Article 5)</p>	<p>The Master Agreement allows LDCs to display the OPA’s and Province’s official marks while advertising or carrying out the CDM Programs or any Initiatives. While only LDCs can actually display the marks, third party service providers can help LDCs <i>design, print and mail out/hand out/broadcast</i> marketing material containing the mark. A third party may not operate a Program or Initiative website.</p>	<p>Before finalizing your contracts with your Third Party provider.</p>	<input data-bbox="1734 758 1837 841" type="checkbox"/>
<p>Review Exhibit C, Section B5 of the “Residential and Small Commercial Demand Response Initiative Schedule – B3”.</p>	<p>The customer information display solution that is deployed in your LDC jurisdiction must ensures that unauthorized access to Participant information is prevented. Compliance with regards to this requirement is critical since Ontario places a high priority on the protection of personal information.</p>	<p>Before finalizing your contracts with your Third Party provider.</p>	<input data-bbox="1734 1155 1837 1238" type="checkbox"/>

Upcoming RES DR Events

February 22 nd	Res DR Research and peaksaver PLUS Creative and Messaging Overview
End of February	peaksaver PLUS website goes live
March	peaksaver PLUS Workshop for LDCs

Important Reminders

- Heating & Cooling
 - Dates must change to reflect 2012 program installation and claim dates please update your materials
 - *Incentives for installations of eligible equipment completed between Jan 1, 2012 and Dec. 31, 2012, must be submitted no later than Feb. 2, 2013
- Coupons
 - 2011 coupons are no longer valid
 - The program name has changed
- Home Assistance Program
 - When you are in market please update your microsite with the appropriate contact information
- Microsite
 - Full list of Vanity URLs available on the Marketing Sharepoint under announcements
- Marketing Standards
 - - Updated at the end of February

Questions?





February Market Research Update
2012 Consumer Segmentation
Erinn Meloche, Research Specialist



The research behind the segments...(summer 2011)

- **An update of the 2007 segmentation was needed**
 - we were observing a much different consumer in recent research; more knowledgeable about energy conservation
- **A qualitative and quantitative approach was taken to update the segmentation**
 - A series of focus groups (in Toronto, GTA and Sudbury)
 - Followed by a robust quantitative survey to create the segments (over 3,000 Ontarians)



The segments were created based on these dimensions...

– Self Empowerment

- The extent to which someone considers managing electricity use to be a personal priority and believes what they are doing is worthwhile

– Personal Benefit

- The belief that I/my family benefits from efforts made by Ontarians to manage electricity use and that there is a financial benefit to reducing electricity use

– Societal Benefit

- The level of concern over environmental impacts of electricity use and the belief that reducing my electricity use helps future generations

– Awareness & Action

- The amount of effort being made to learn about and to manage electricity use, attention paid to programs and rebates and the number of steps taken to reduce electricity use



A snapshot of the segments...

- **Two segments are generally engaged with electricity conservation**
 - Bea Lever
 - Eartha Sustain
- **One segment is supportive, not proactive...yet generates savings**
 - Flo Gowith
- **One not engaged with electricity conservation but may have potential**
 - Simon Sayuz
- **One not engaged overall but shows some very specific potential touch points**
 - Don Wanna



Meet Bea Lever, “Conservation Collaborator”



BEA LEAVER

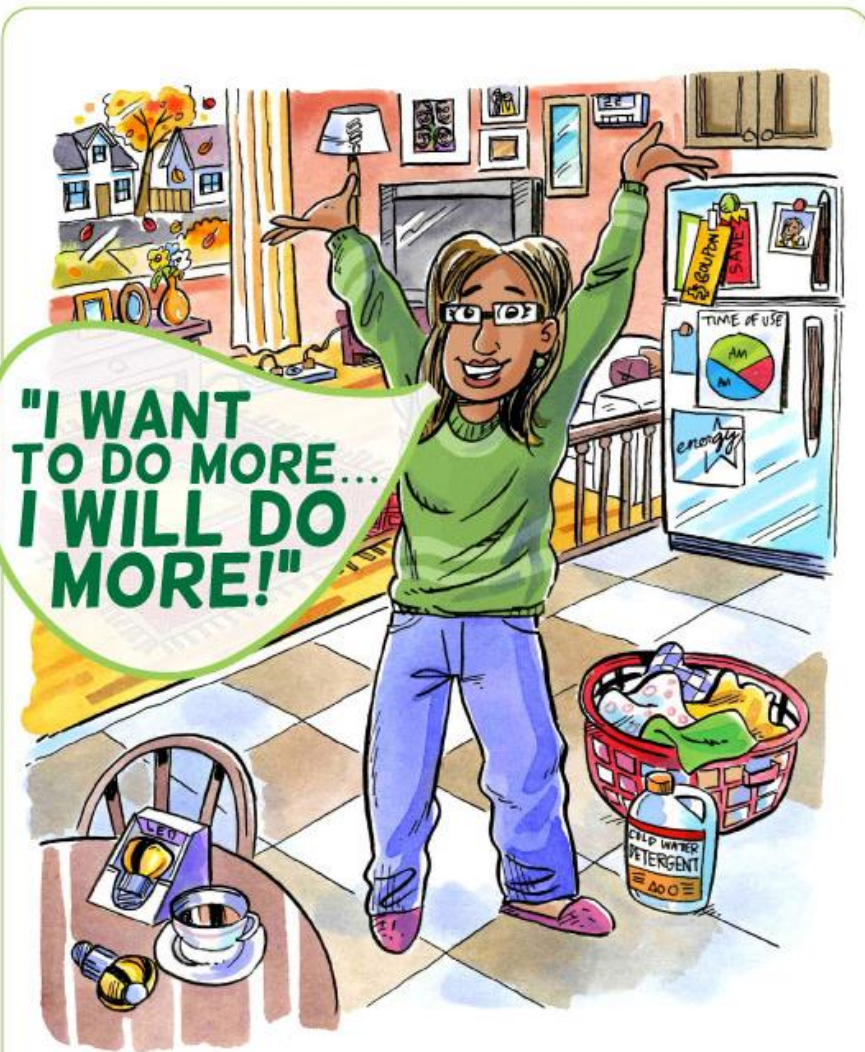
Demographic Profile:

- 💡 Over half are 35-54 yrs
- 💡 Female skew
- 💡 3 in 4 own their home
- 💡 Highest % South Asian
- 💡 2nd lowest HH income

23% of Ontario population



Meet Bea Lever, “Conservation Collaborator”



BEA LEAVER

Personal Views:

- 💡 Early adopters of new technologies
- 💡 Enjoy modern life and the technology that comes with it
- 💡 Shows goodwill toward large corporations, sees their place in this world
- 💡 No deep community involvement – but, shows compassion for others
- 💡 Most likely to say they think less of others who waste energy



Meet Bea Lever, “Conservation Collaborator”



BEA LEAVER

Electricity Conservation Attitudes:

- 💡 High level of natural conservation
- 💡 Personal priority – even a personal challenge – to reduce usage in the home
- 💡 Most likely to feel rewarded for efforts – lowest monthly bill
- 💡 They see the big picture benefits – would use energy wisely without \$ savings



Meet Bea Lever, “Conservation Collaborator”



BEA LEAVER

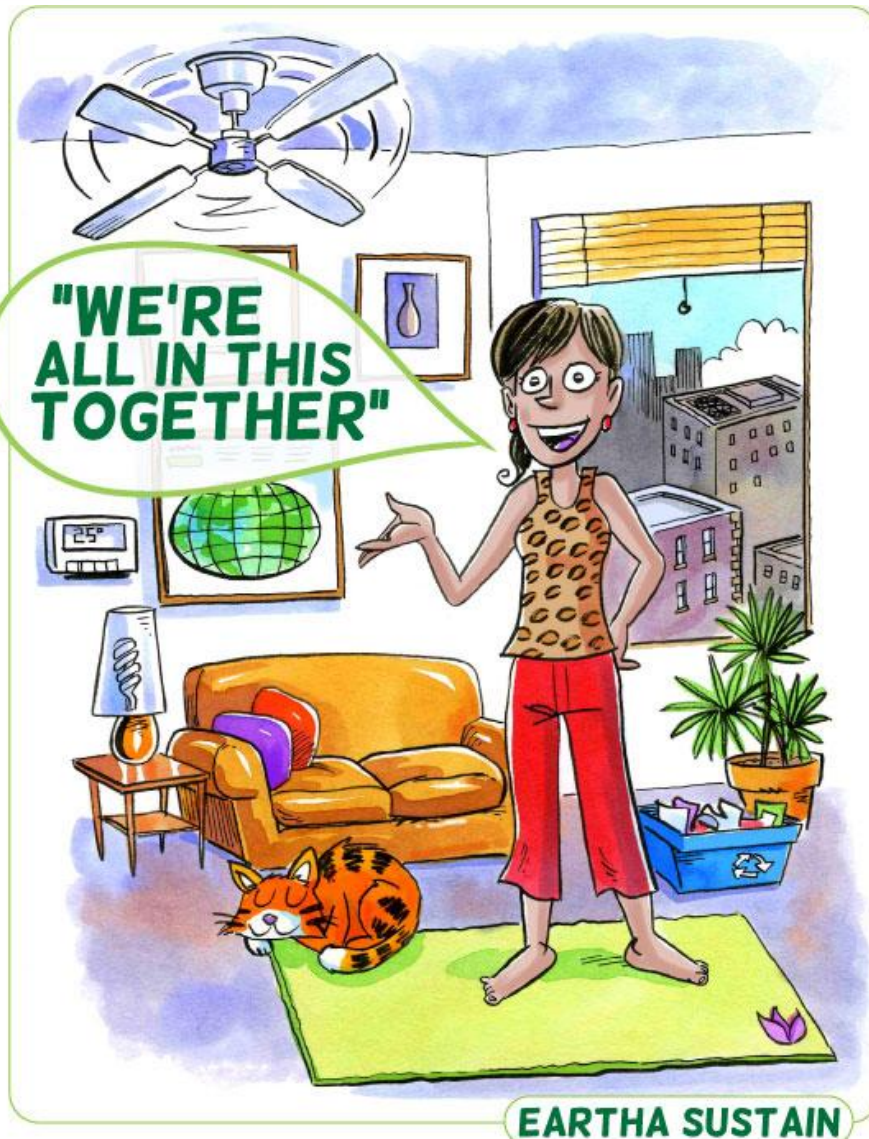
Opportunity:

- 💡 This segment found a way to make conservation a priority on a low budget
- 💡 These people can be used in testimonials as conservation role models
- 💡 Despite being a highly engaged segment; they are still looking for new and innovative ways to save

Challenge: giving them fresh and engaging information



Introducing Eartha Sustain, “Conservation Craver”



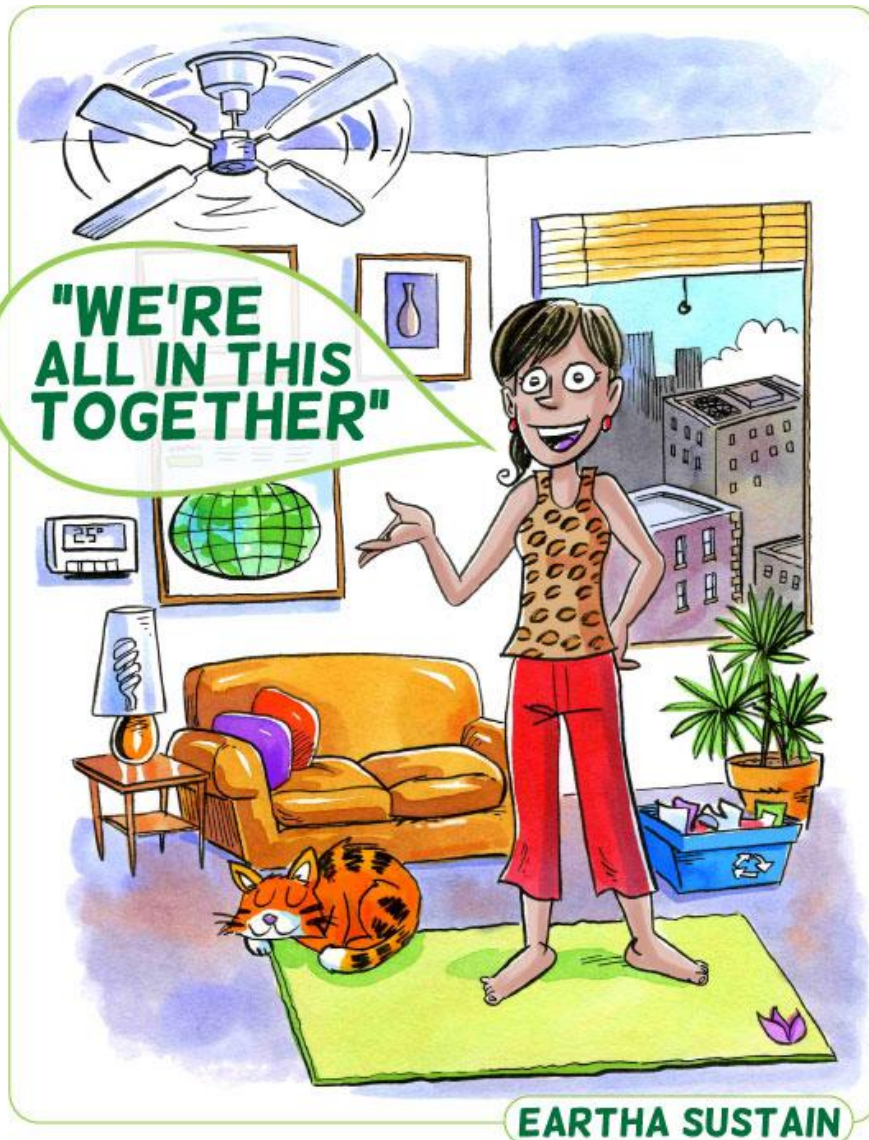
Demographic Profile:

- 💡 Female decision-makers
- 💡 Highest % born outside Canada (1 in 3)
 - More newcomers (1-10yrs in Canada)
- 💡 Highest mix of renters
 - 1 in 5 no A/C
- 💡 Lowest HH income




20% of Ontario population



Introducing Eartha Sustain, “Conservation Craver”

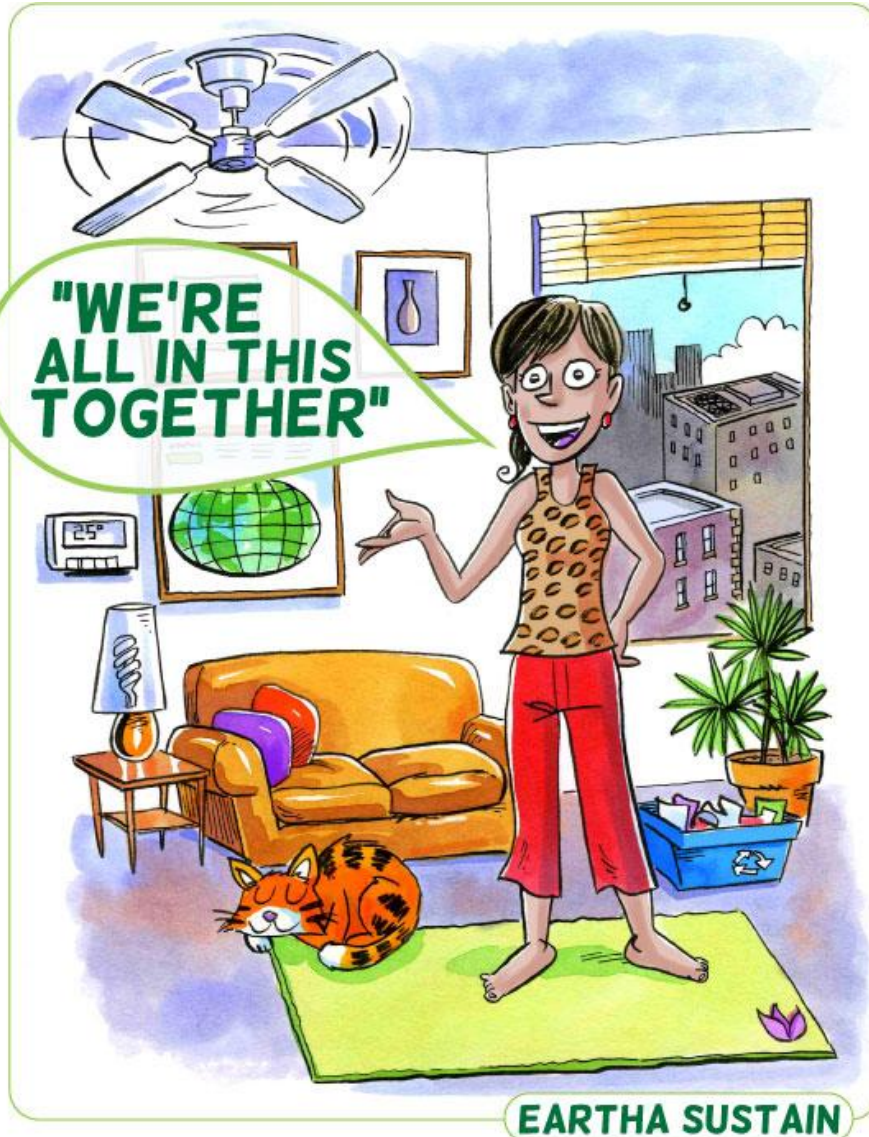


Personal Views:




-  Sustainability is a personal priority
-  Post-consumerist, values simplicity, cultural exploration
-  Leads a “slower” lifestyle; not drawn to new technologies
-  Optimism – they feel that their community is equally committed to conservation without needing any evidence



Introducing Eartha Sustain, “Conservation Craver”

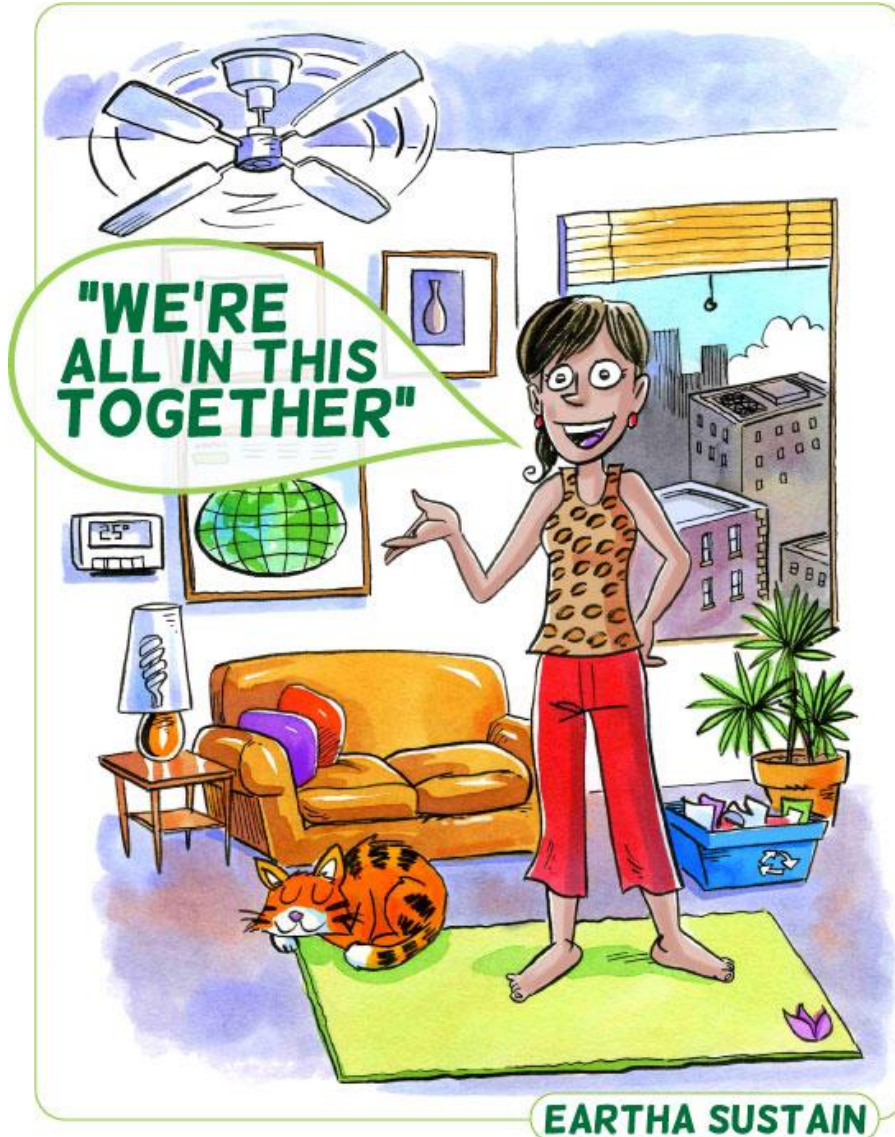


Electricity Conservation Attitudes:




-  1/3 are doing a lot to conserve; the rest agree they could be doing more
-  Main concern – impact of energy conservation on the environment; they want to see evidence of the payoff of efforts
-  They see value in the long-term payoff rather than being attracted to instant savings; also see quality of life as a payoff



Introducing Eartha Sustain, “Conservation Craver”



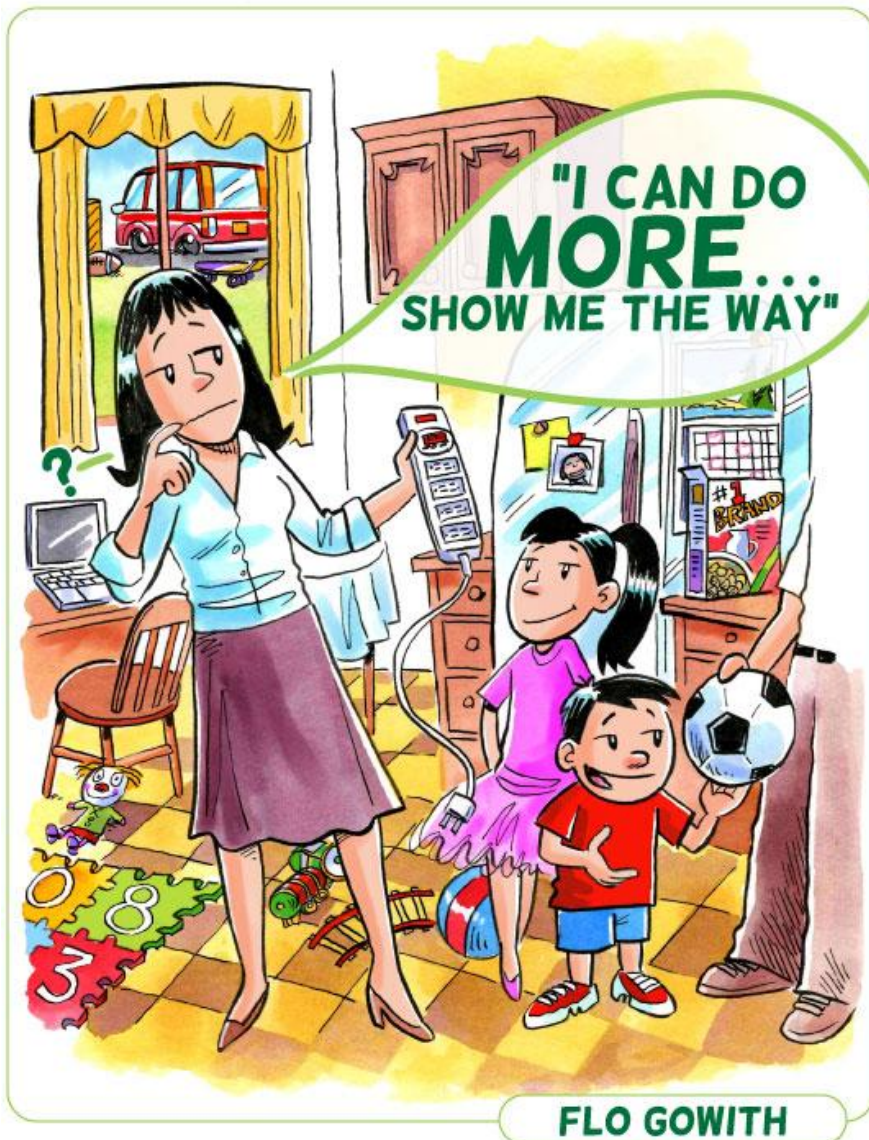
Opportunity:

-  Messaging around “fitting in” with the rest of the conserving community
-  And, Ontarians should be appreciative of the availability of such a reliable source of energy.
-  Make them champions of the **culture** of conservation.

Challenge: Not in control of many energy-using decisions; renters



Here is Flo Gowith, “Fence Sitter”



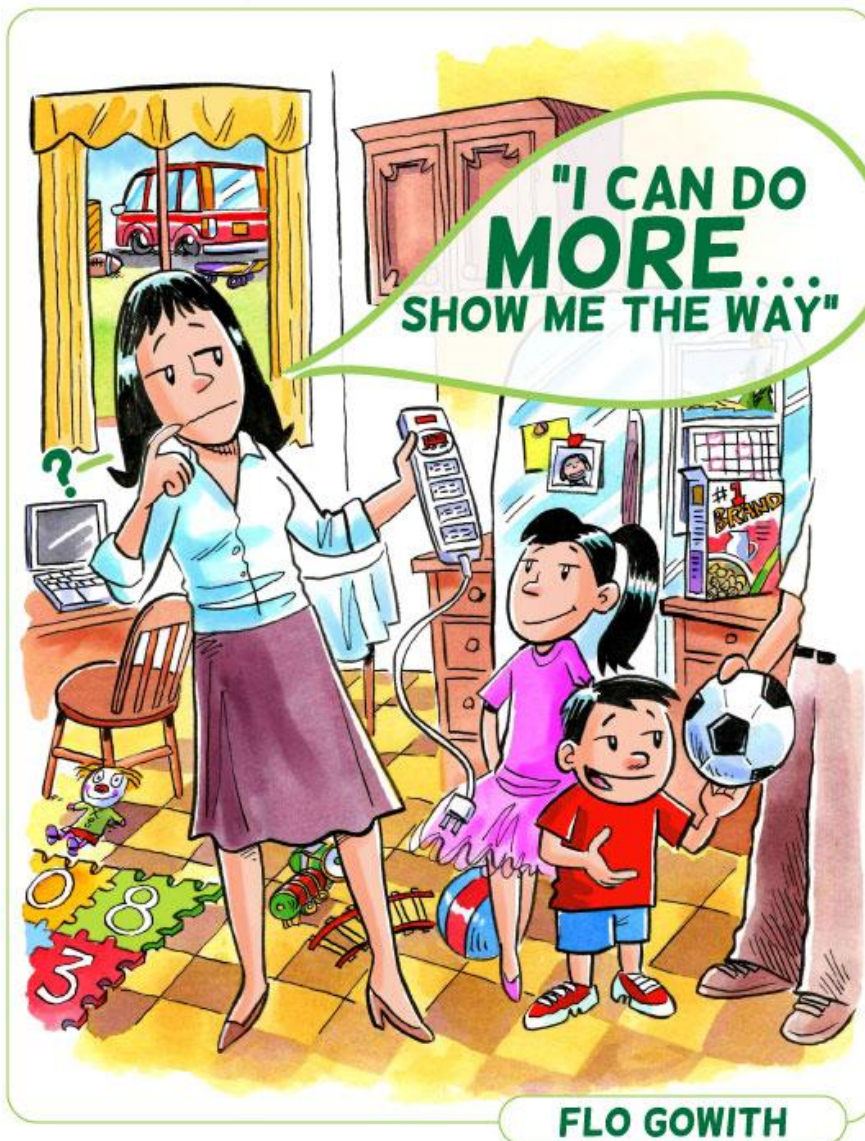
Demographic Profile:

- 💡 Female-shared decision-making
- 💡 Highest % employed
- 💡 Largest families (3.2 ppl/HH)
- 💡 Highest % Chinese
- 💡 1 in 3 under the age of 35
- 💡 Above average HH income






22% of Ontario population



Here is Flo Gowith, “Fence Sitter”

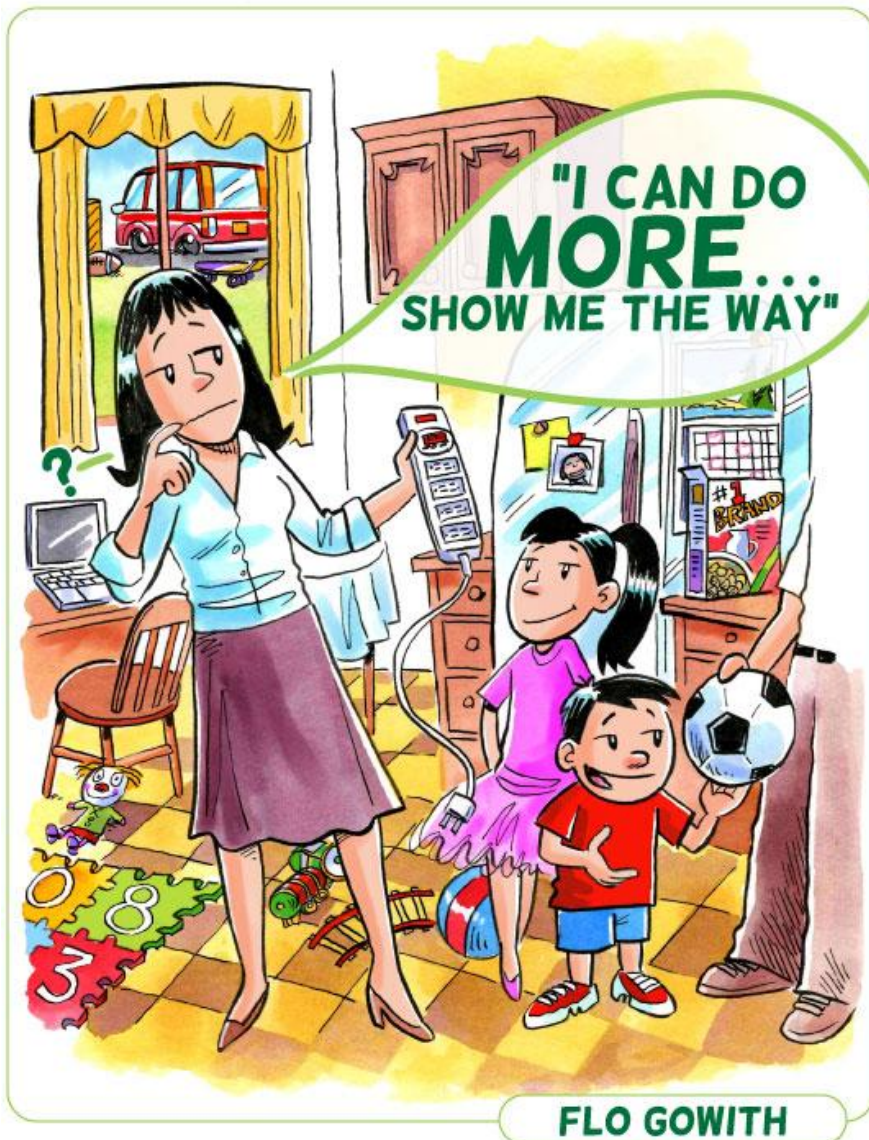


Personal Views:





-  Follower rather than leader; more comfortable being part of the crowd
-  Wants to be appreciated and respected
-  A long TO-DO list; very busy with her family and other commitments
-  She is a saver on principle to ensure that she always has a safety net for her family
-  Focus on family's quality of life



Here is Flo Gowith, “Fence Sitter”

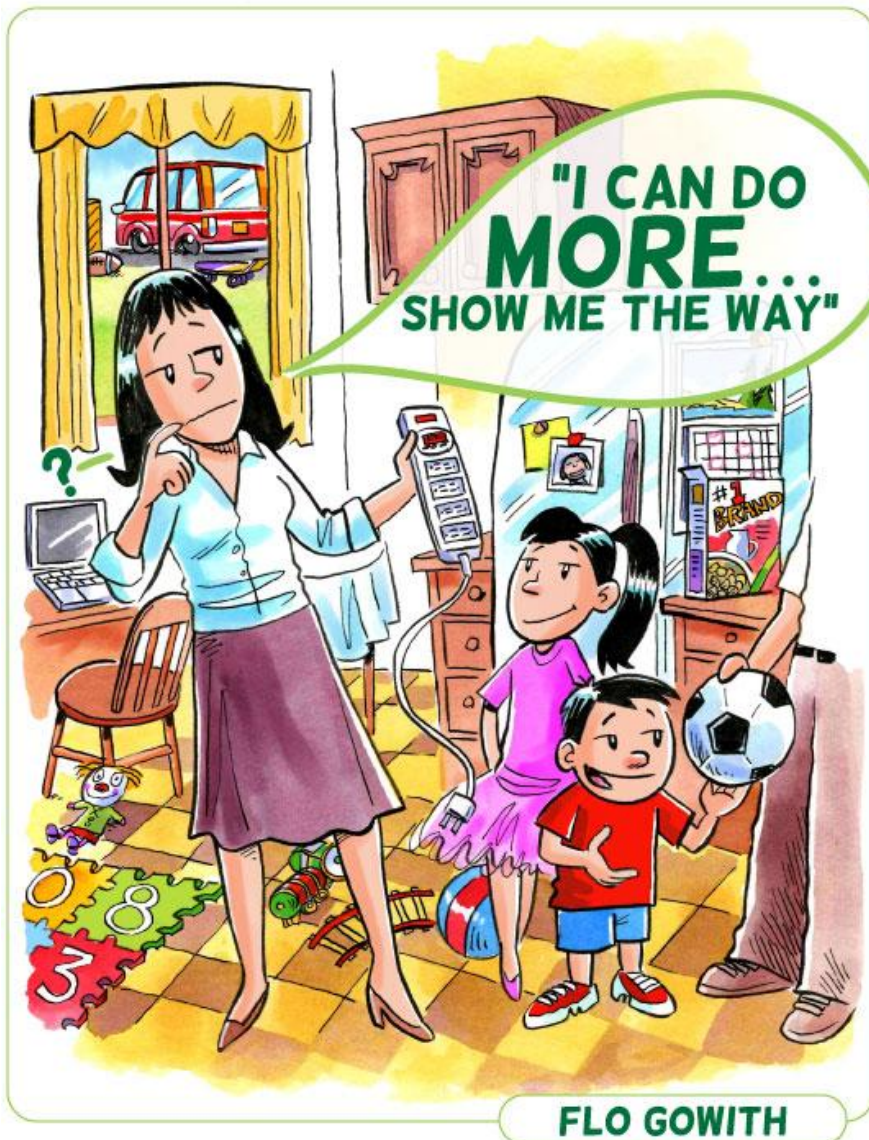


Electricity Conservation Attitudes:

-  Conserving is somewhat of a priority for this group; they are willing but need a push
-  They do claim to be doing several conservation behaviours but feel they could do a lot more
-  They also feel guilty for not doing more to conserve
-  They need to see more payoff; right now it's just a way to keep their bill from increasing



Here is Flo Gowith, “Fence Sitter”



Opportunity:

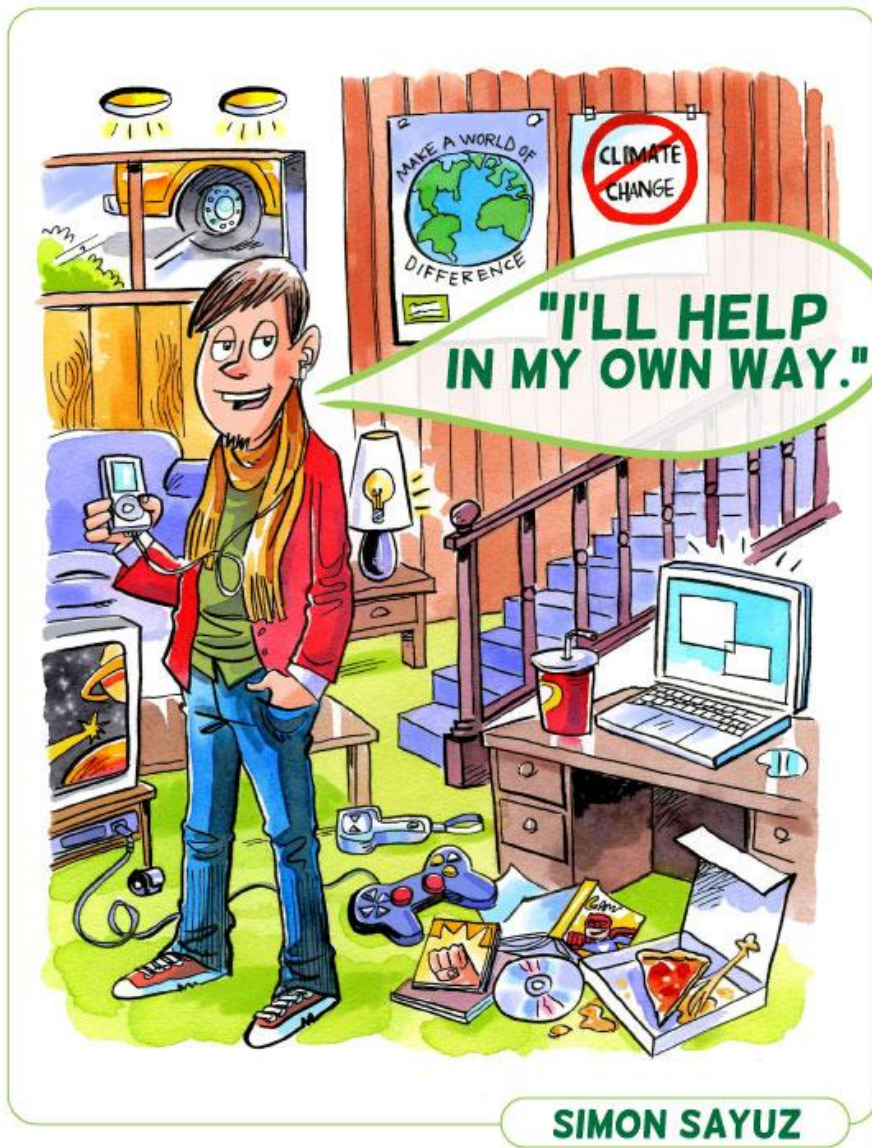
- 💡 They are aware that they can do more and have the financial resources to do so
- 💡 They feel guilty for not being more engaged so should be relatively easy to sway this group

Challenge:

- 💡 **Must target both decision makers in the household**
- 💡 **Busy lifestyle, hard to get their attention; benefits must be up front and obvious**



And, Simon Sayuz, “Conservation-Challenged”



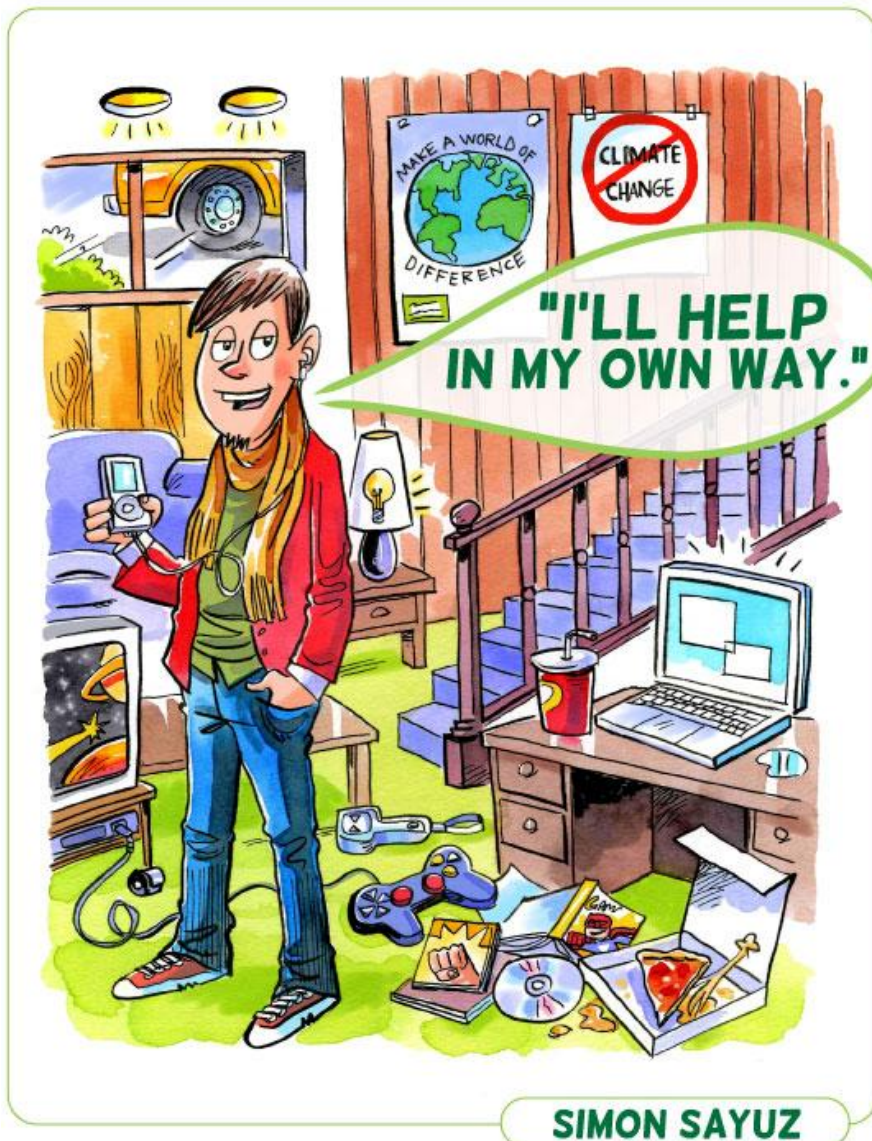
Demographic Profile:

- 💡 Slight male skew
- 💡 Youngest segment (1/2 under 35 yrs)
- 💡 Most highly educated
-1/3 out of/looking for work
- 💡 1 in 3 unaware of elec. bill
- 💡 Live at home/rent with roommates (3 ppl HH)
- 💡 Almost completely urban

19% of Ontario population



And, Simon Sayuz, “Conservation-Challenged”



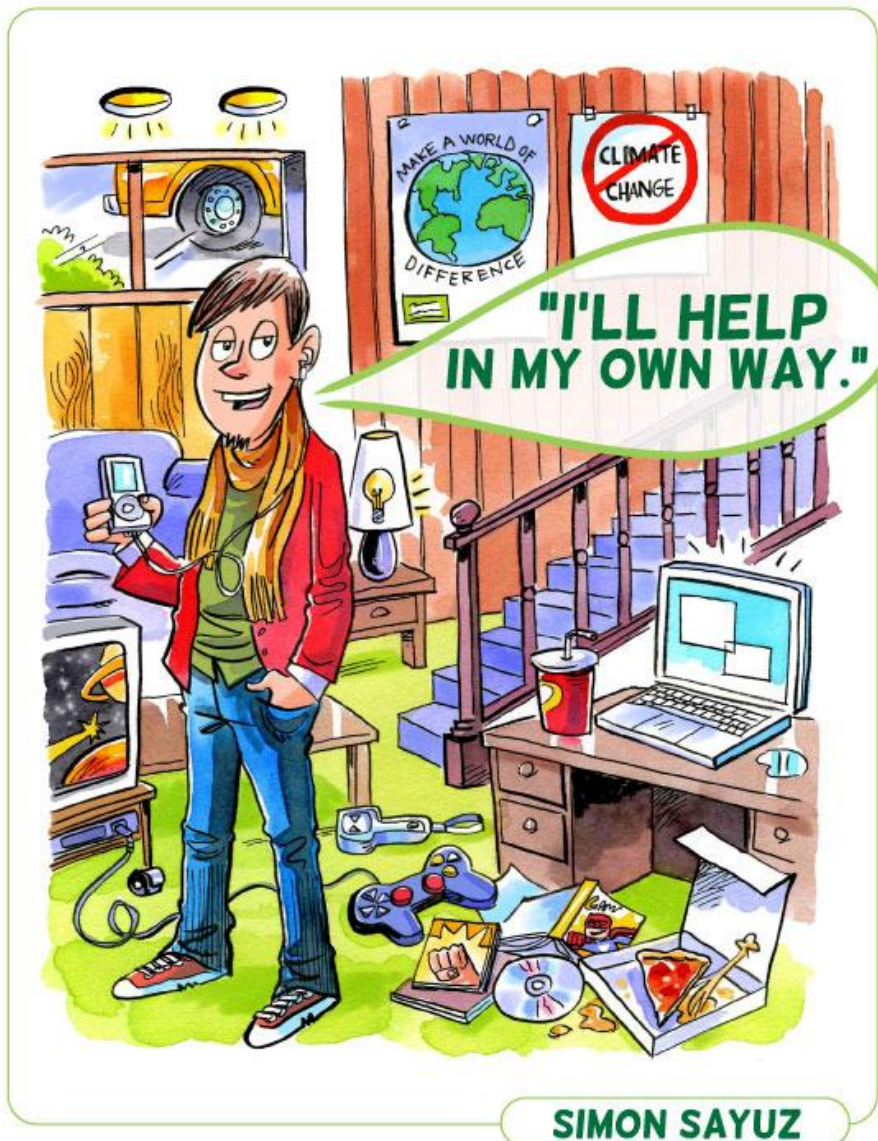
SIMON SAYUZ

Personal Views:

- 💡 Feeling of belonging to their community and sense of social responsibility
- 💡 Their community is primarily an online one – social media
- 💡 Rejection of authority and institutions
- 💡 Desire to be informed, consulted and involved in decisions that affect their lives
- 💡 However, not necessarily proactive enough to take part in movements/take up causes



And, Simon Sayuz, “Conservation-Challenged”

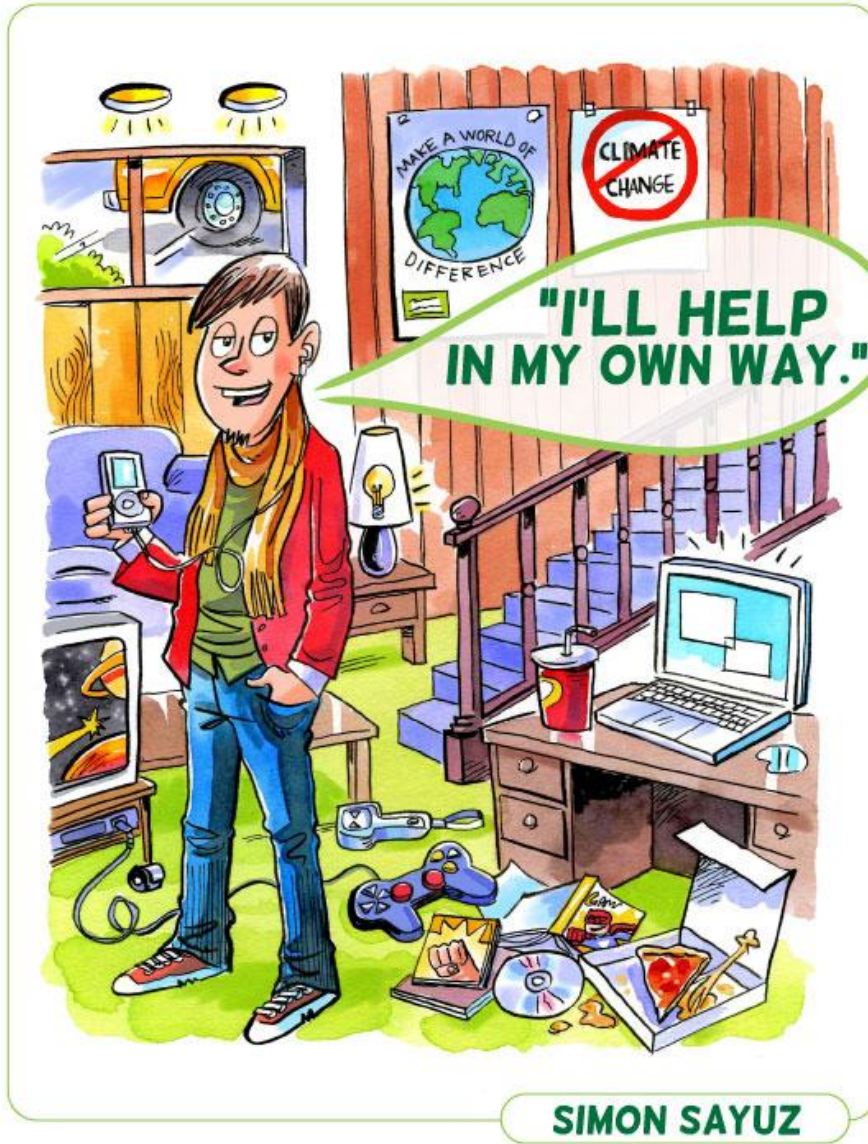


Electricity Conservation Attitudes:

- 💡 They do little to conserve right now but realize they could do a lot more
- 💡 They don't believe others in the province are committed to conservation either
- 💡 Most likely to agree that high electricity prices will keep usage in check; level playing field
- 💡 Energy conservation is not on their radar; not a priority in their lives right now



And, Simon Sayuz, “Conservation-Challenged”



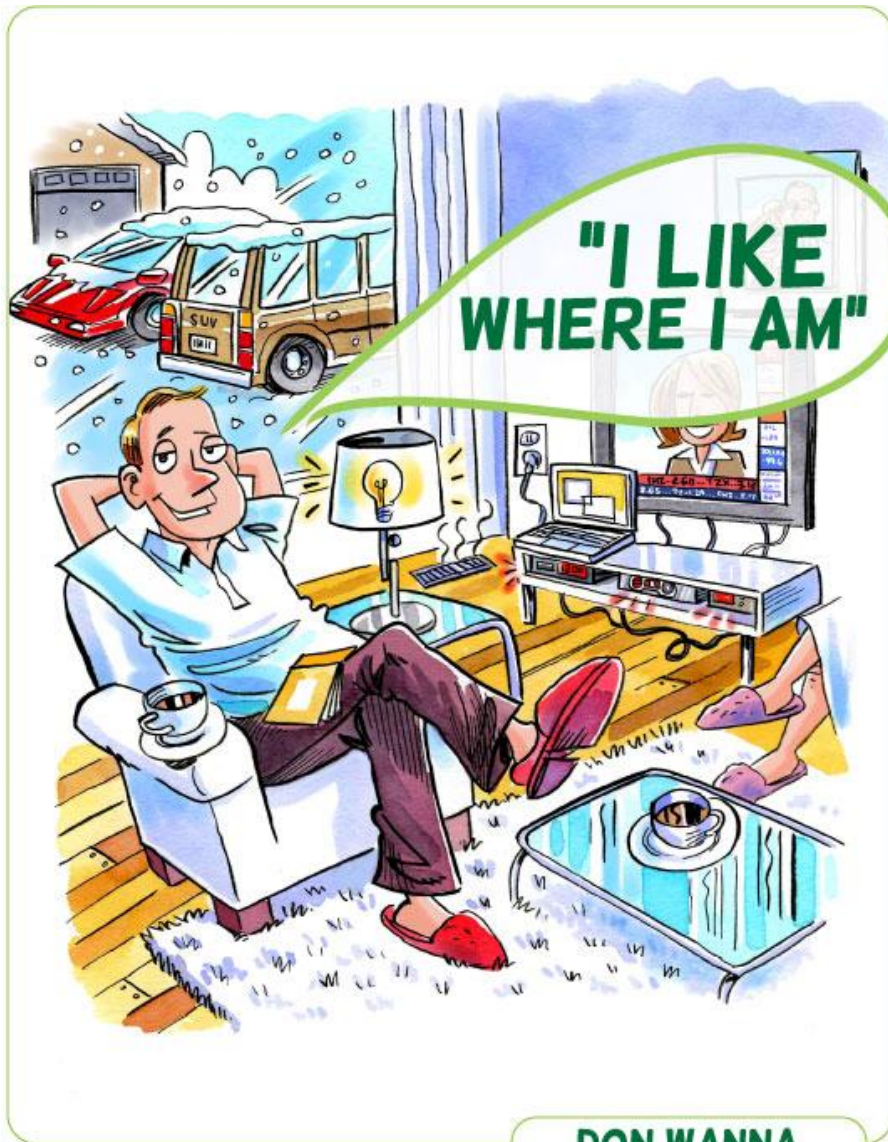
Opportunity:

- 💡 Understanding of policies and issues; they know why conservation is important and understand why TOU is in place
- 💡 But, not to the point where they will act on that knowledge (cognitive dissonance)
- 💡 This disconnect may ultimately cause them to act; or at least blog about it
- 💡 The impact on future generations may also get their attention

Barriers: skepticism, cynicism, no financial consequences



Finally...Don Wanna, a “Hard Target” Segment



DON WANNA

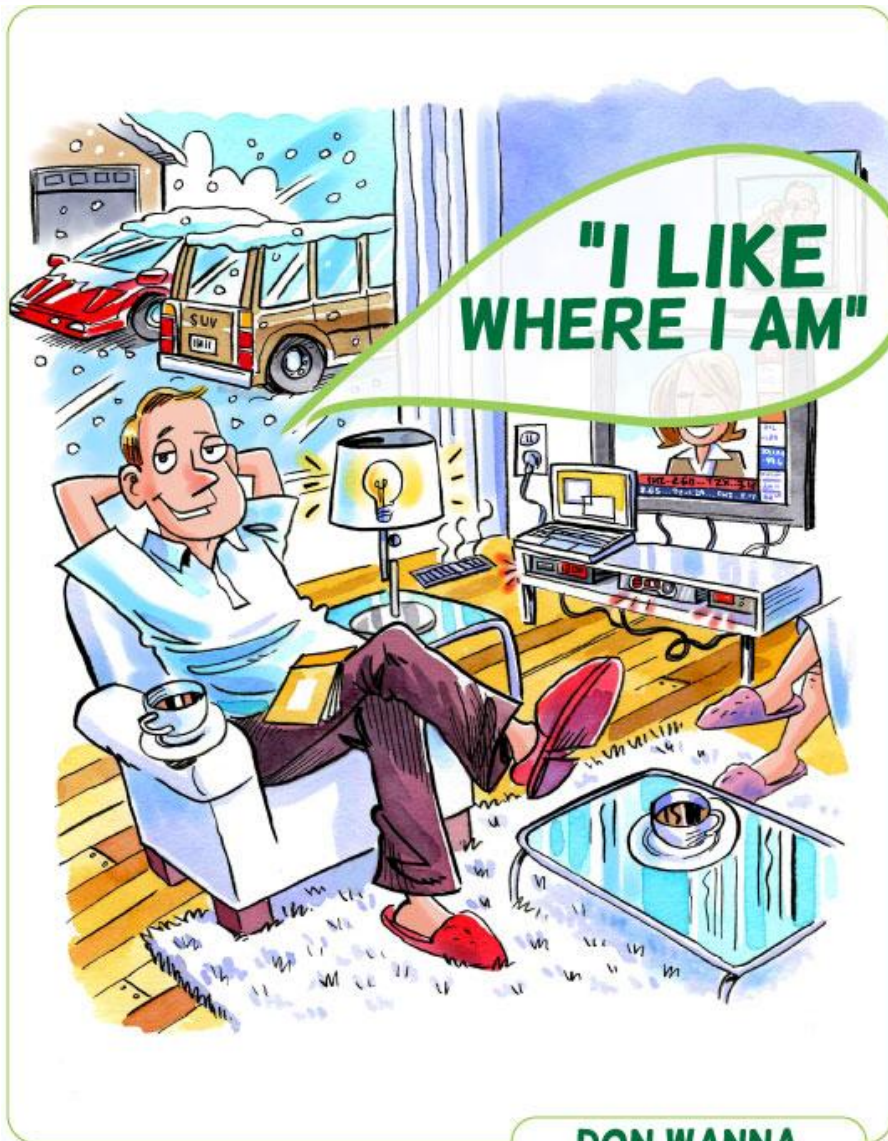
Demographic Profile:

- 💡 Male skew- sole bill payer
- 💡 80% born in Canada;
Caucasian English-speakers
- 💡 1 in 3 HH size of 2 ppl
(empty nesters)

16% of Ontario population



Finally...Don Wanna, a “Hard Target” Segment



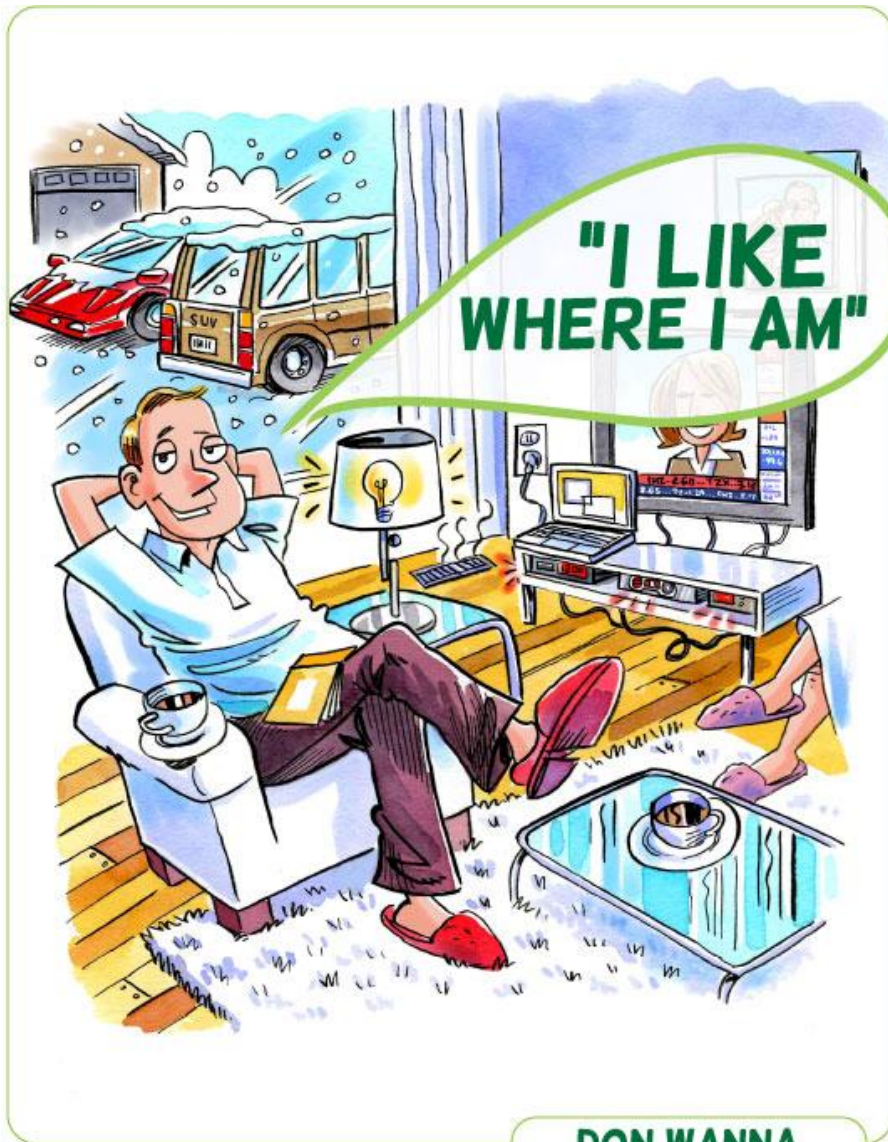
DON WANNA

Personal Views:

- 💡 Resistant to change and being told what to do
- 💡 Want to lead a simple life; they are set in their ways
- 💡 Feeling of belonging to his (carefully chosen) social circle
- 💡 Skeptical of big business but believes government fulfills a beneficial function



Finally...Don Wanna, a “Hard Target” Segment



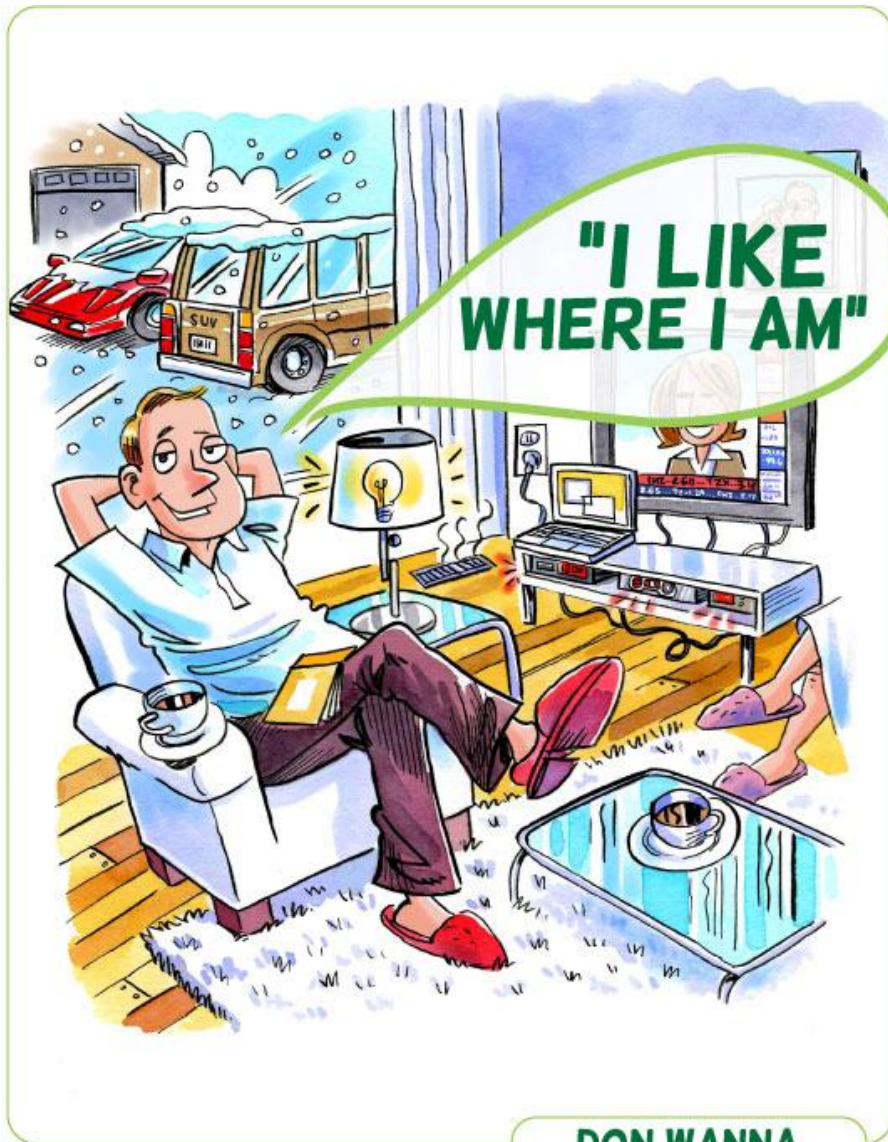
DON WANNA

Electricity Conservation Attitudes:

- 💡 They are not conserving; do not believe they should be doing more; not interested in setting an example for others
- 💡 Don't see a payoff. They feel if they were to do more to conserve electricity, it would have little impact on their bill
- 💡 When it comes to conservation they feel they are being told what to do rather than given a choice
- 💡 Ironically, they are most likely to say they conserve unconsciously, likely because these are automatic actions that are not an imposition.



Finally...Don Wanna, a “Hard Target” Segment



DON WANNA

Opportunity:

- 💡 Supportive of public policy and the public sector
- 💡 An educational campaign around home comfort might get the attention of some people in this segment; as long as the actions will not be a personal imposition

Challenge:

- 💡 Low level of interest; satisfied with life the way it is
- 💡 Don't see personal rewards associated with behaviour change



What each LDC will receive...

- **Ready for download on SharePoint beginning Feb. 15th**
 - An updated residential profile that will include the breakdown of segments in their territory
 - For example, while Ontario-wide “Fence Sitters” make up 22% of the population, in Hydro Ottawa’s territory they make up 28%
- **You will also receive a copy of this PowerPoint deck**
- **Future research: Consumption Potential by Segment**



How are the segments informing the 2012 messaging strategy?

- **Segmentation** – dividing the marketing into distinct groups
- **Targeting** – deciding which of these groups to communicate with, and how to talk to them
- **Positioning** – how the program or brand should be perceived by the target groups
- **Messaging** - delivering a specific message in order to influence the target groups



THANK YOU!