



A NATIONAL SUMMIT ON
**SMART GRID AND
CLIMATE CHANGE**

DECEMBER
2-3 2014
WASHINGTON, DC

Workshop Panel 2

What Varied Customer Perspectives Mean for Communications, Education, Outreach



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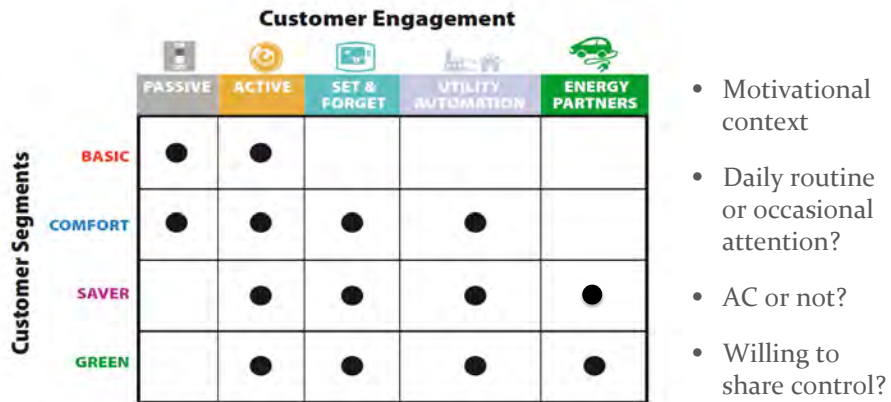
Lifestyle Model



Explored in IEE White Paper on Smart Meter Costs & Benefits, based on idea from SCE
Concepts validated by research from EcoAlign, Accenture and SGCC

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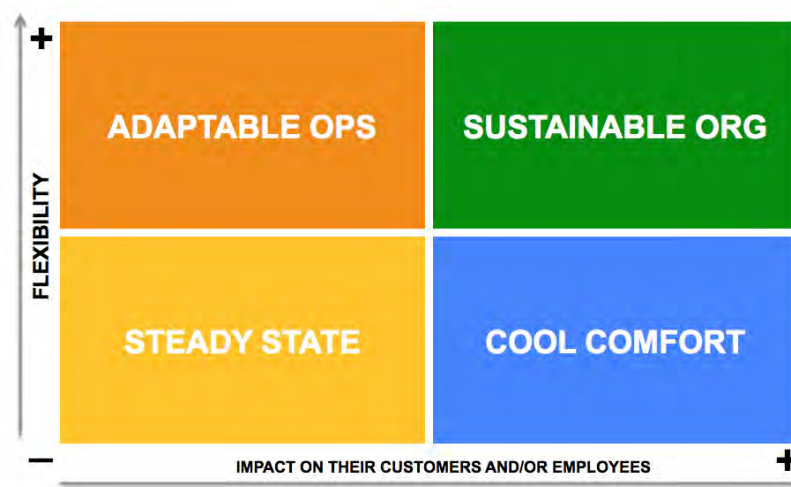
Varied Levels of Commitment



Source: IEE White Paper on Smart Meter Costs & Benefits

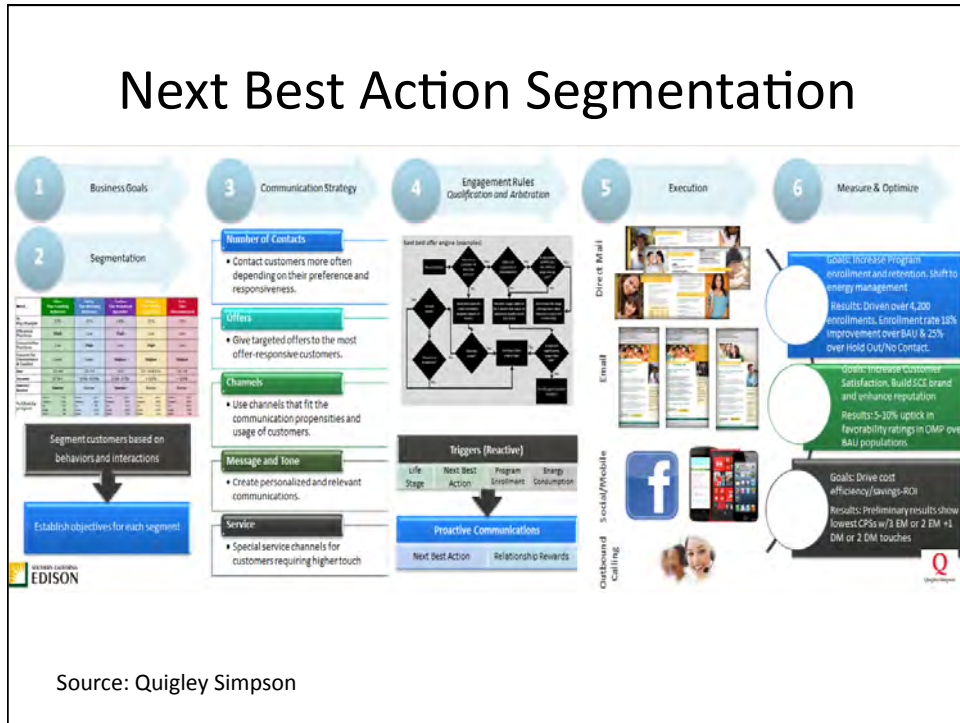
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Commercial & Industrial Segments



Source: To the Point ©2011

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ENERGY STAR. The simple choice for energy efficiency.

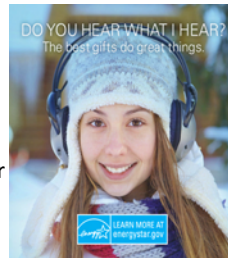
National Mass Marketing of EE:

- Finding creative ways to appeal to all audiences and incite behavioral change
 - “Lowest Common Denominator”
 - Save energy
 - Save money
 - Reduce waste
 - Leverage seasonal hooks
 - Earth Day
 - Cooling / Heating
 - Leverage product-related hooks
 - Ex. Consumer Electronics, Appliances
 - Utilize self selection wherever possible
 - Providing our partners a strong and relevant brand for them to leverage in their own segmentation efforts

The simple choice for energy efficiency

Major Outreach Initiatives for 2015

- Product / Seasonal Integrated Media Promotions
 - Winterization / heating
 - Holiday (consumer electronics)
 - NEW ENERGY STAR certified Dryers
 - Refrigerator early replacement
 - Cooling
 - Water Heater promotion (TBD)
 - Lighting
- ENERGY STAR Most Efficient
 - Additional spot markets
- Back to School / Team ENERGY STAR
 - Boys and Girls Clubs partnership
- My ENERGY STAR consumer promotion
- 2015 ENERGY STAR Change the World Tour



Local Greenies: Northwest America Leads for Super Greenies

San Francisco, Seattle, Portland and San Diego are the Top Local Markets for Super Greenies
(Nationally, Five Percent of U.S. Adults are Super Green)

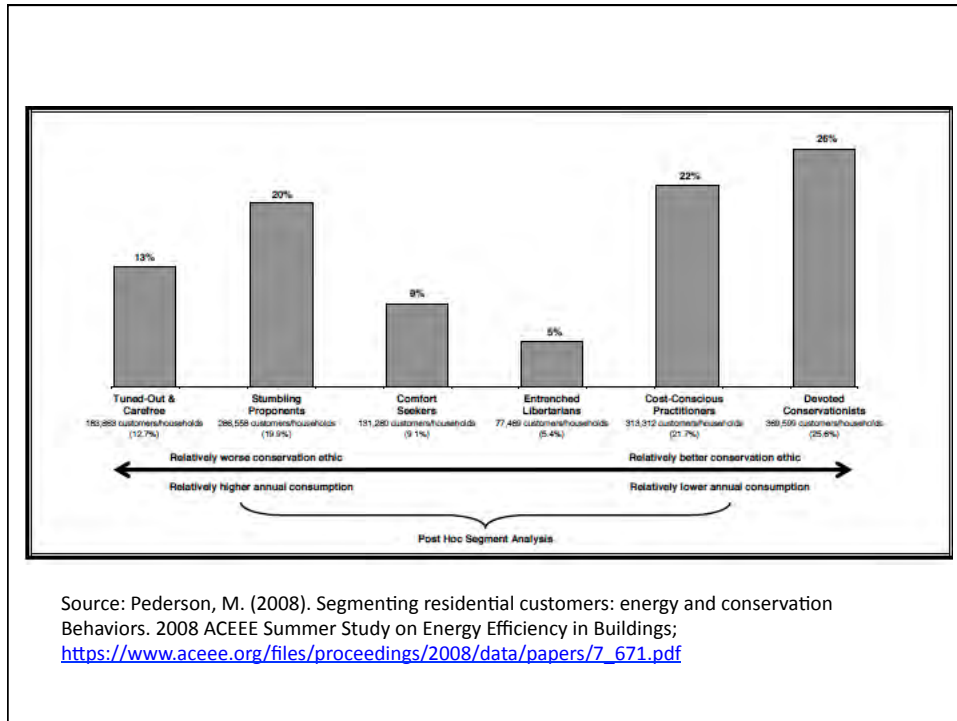
Local Market (DMA)	Super Greenies %	Local Market (DMA)	Super Greenies %	Local Market (DMA)	Super Greenies %
San Francisco, CA	17%	Hartford, CT	8%	Norfolk, VA	4%
Seattle, WA	13%	Greenville, SC	6%	Cleveland, OH	4%
Portland, OR	11%	Chicago, IL	8%	St. Louis, MO	4%
San Diego, CA	11%	West Palm Beach, FL	6%	Mobile, AL/Pensacola, FL	4%
Denver, CO	10%	New York, NY	6%	Atlanta, GA	4%
Austin, TX	10%	Roanoke, VA	6%	Green Bay, WI	4%
Washington D.C.	9%	NATIONAL AVERAGE	5%	Columbus, OH	4%
Spokane, WA	8%	Tucson, AZ	5%	Jacksonville, FL	4%
Honolulu, HI	8%	Detroit, MI	5%	Cincinnati, OH	4%
Minneapolis, MN	8%	Philadelphia, PA	5%	Rochester, NY	3%
Raleigh, NC	8%	Kansas City, MO	5%	Phoenix, AZ	3%
Boston, MA	8%	Dallas/Ft. Worth, TX	5%	Indianapolis, IN	3%
Providence, RI	7%	Richmond, VA	5%	Knoxville, TN	3%
Buffalo, NY	7%	Los Angeles, CA	5%	Louisville, KY	3%
Syracuse, NY	7%	Harrisburg, PA	5%	San Antonio, TX	3%
Albany, NY	7%	Fresno, CA	5%	Chattanooga, TN	3%
Baltimore, MD	7%	Tampa, FL	4%	Miami, FL	3%
Albuquerque, NM	7%	Des Moines, IA	4%	Nashville, TN	3%
Grand Rapids, MI	6%	Flint, MI	4%	Houston, TX	3%
Colorado Springs, CO	6%	Pittsburgh, PA	4%		
Sacramento, CA	6%	Salt Lake City, UT	4%		
Milwaukee, WI	6%	Lexington, KY	4%		
Fort Myers, FL	6%	Toledo, OH	4%		
		Orlando, FL	4%		

The Northwest is more likely to be Super Green. Markets such as San Francisco, Seattle and Portland lead for Super Green consumers.

MARKETING TIP: As you consider local strategy, go deeper than the overall percentage of Super Greenies. How many recyclers, hybrid drivers or energy saving appliance owners are in your neighborhood? Use Scarborough to connect with the Super Green locally.

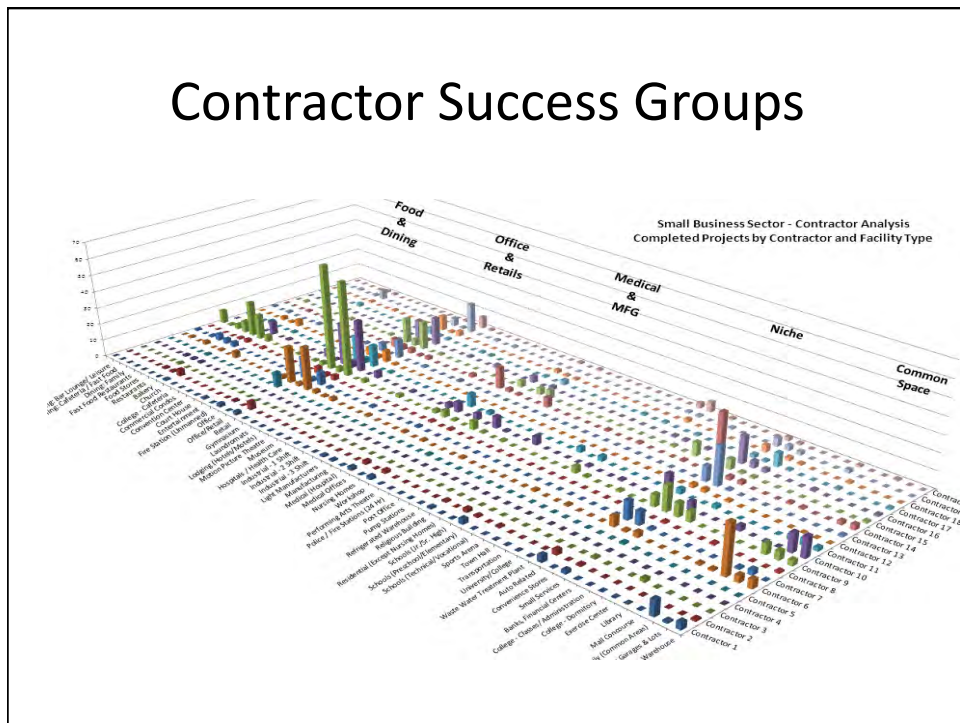
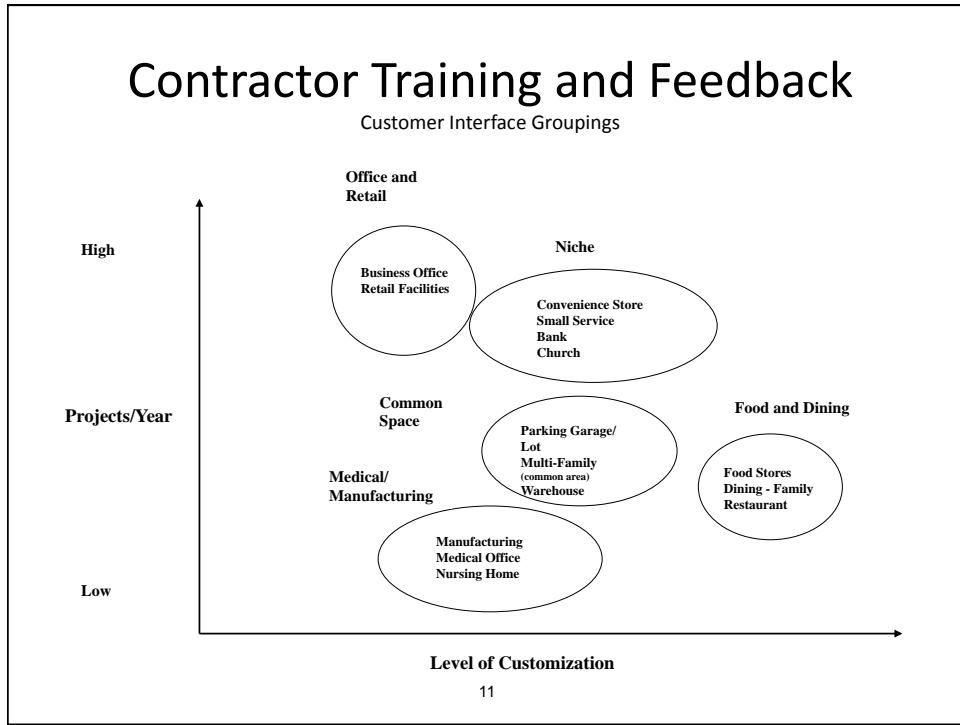


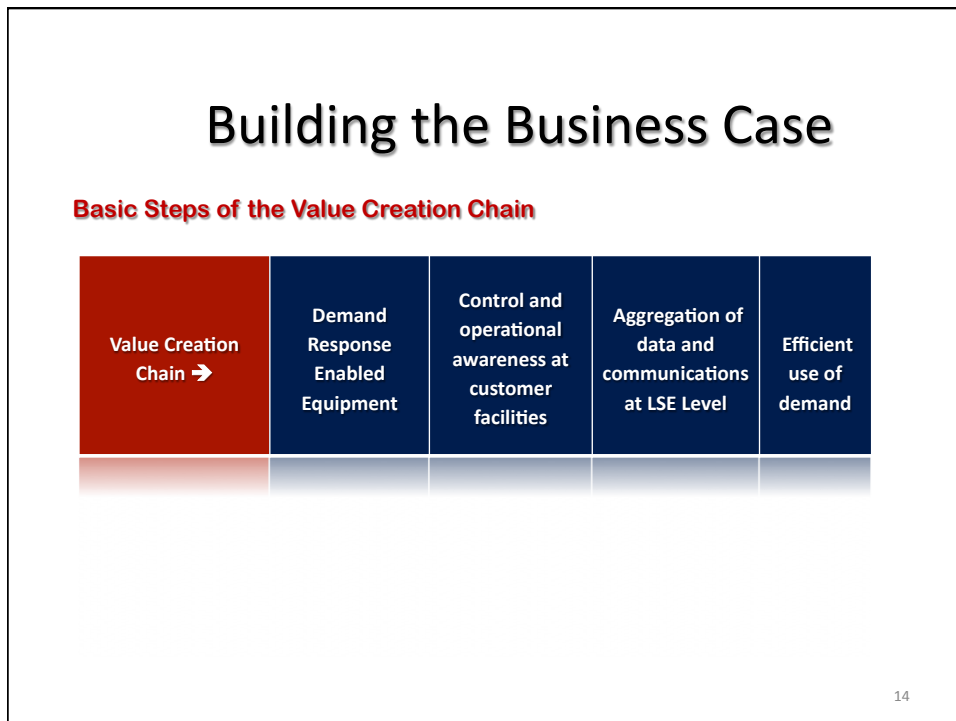
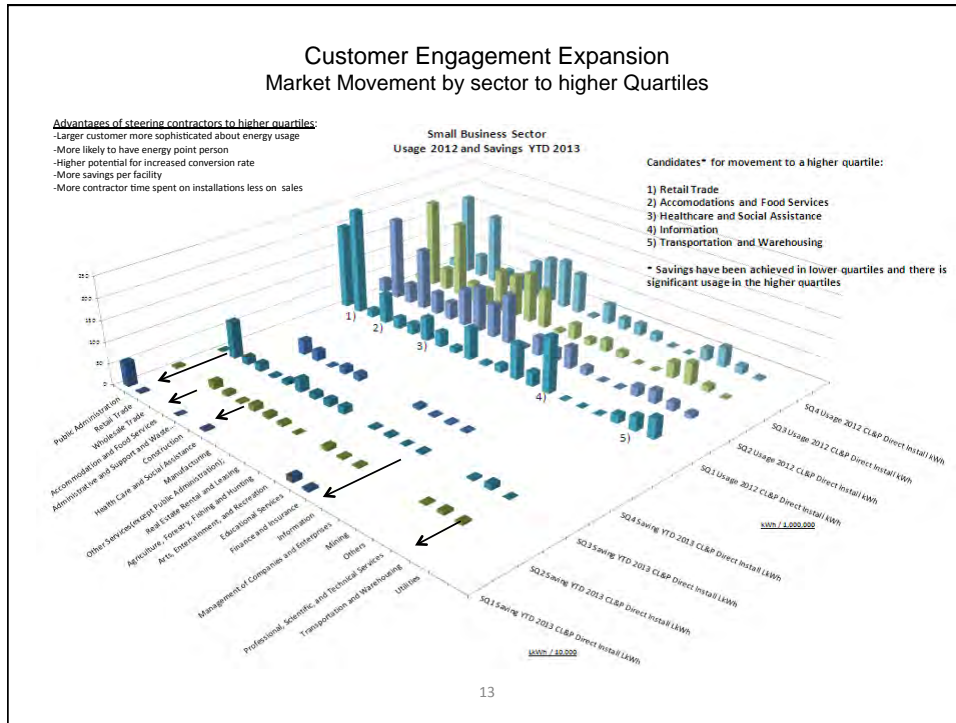
All markets listed contained a sufficient level of Super Greenie respondents. Don't see your market? Email us at info@scarborough.com for more information.



Energy Bike







Building the Business Case

Market Entities - Role

Value Creation Chain →	Demand Response Enabled Equipment	Control and operational awareness at customer facilities	Aggregation of data and communications at LSE Level	Efficient use of demand
Feature	Digital signal control	Load control and end-user facility awareness	Data transfer and information management	Reduced costs
Market Entity	Equipment provider	Demand Response provider	Communications and control providers	End users and LSE
Action	Sales, installation and compatibility	Provides load reduction availability and executes reduction commands	Facilitate data communications and situational awareness	Efficient use of demand
Customer interface or LSE interface	Customer	Customer	LSE	Customer and LSE

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