Marketing Energy Efficiency As a Consumer Commodity

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This authors draw upon 16 years of evaluation experience in conducting energy service marketing evaluations and market assessment research in the commercial and small industrial sectors to present real-life experiences and results of marketing efforts for energy services. The paper covers the use of mass and targeted media, community groups, trade allies, social groups and networks, demonstrations, one-on-one appeals and other methods to market energy services. While the paper draws from the experiences of conducting 19 different evaluations involving commercial customers over the last 10 years, most of the information presented is taken from research conducted between 1993 and 1996. The authors present the marketing strategy, the customer's response to the strategy, and in many cases the strategy's influence on program participation.

The programs and marketing strategies referred to in this paper were implemented in the mid-western regions of the United States and were offered by eight different utility companies located in Wisconsin and Michigan.

The paper also includes a brief review of some of the segmentation strategies used in various program marketing efforts and relates their relative success at motivating customer to participation. The paper is structured to provide evaluations of marketing strategies to organizations marketing in a more competitive environment.

INTRODUCTION

As the concepts of retail wheeling and intra/inter-state competition catch the attention of utility investors, utility marketing managers are pondering how to design and market programs in a competitive environment. The pressures to lower costs are significant and utilities are down-sizing, consolidating, restructuring and merging in response. Energy service managers are struggling to design and market new products and services to diversify product offerings, to build customer loyalty, to guard against the erosion of their market, and to gain market share. In some cases, utilities are uncertain about how to segment their markets or how to contact customers with new services or products. Portfolios of product ideas are being put on hold as managers search for the "right" program, product, marketing strategy, or service profit level. Some utilities aggressively field testing new products and marketing strategies on real customers to gain market experience and a competitive edge.

The purpose of this paper is to provide information about how to effectively reach customers with energy services and to help managers think about their marketing strategy for a competitive market. The paper draws upon the authors 16 years of experience conducting market research and marketing evaluations on 19 different programs. However, most information presented in this paper is taken from more recent program evaluations conducted during the 1993-1996 period in Wisconsin and Michigan.

In this paper we have not linked evaluation results with their energy service programs or providers. Where program-specific information is provided, the information is taken from publicly available evaluation results. This approach is taken because confidentiality agreements signed by the authors preclude using program specific information that is not publicly available.

THE CONCEPT OF MARKETING ENERGY EFFICIENCY

An important marketing consideration repeatedly expressed to us by commercial customers is that they do not necessarily value energy efficiency. Customers advise use that energy costs are often a small part of total business expenses; that they are unfamiliar with the equipment and processes that consume energy; that they are not interested in the specifics of energy efficiency; and that they do not have the time to learn. In other works, energy efficiency is, in itself, not thought of as a product or a service but a means to an end.

To sell energy efficiency to commercial customers, program staff must convert the concept of energy efficiency into a product or service valued by the customer. The goal for marketers is to identify the value to the customer, then design, package and deliver the product so that it provides value. When implementors successfully identify something of value to the customer, it can be sold in the form of a product or service.

The value of an energy efficient service can take many forms. In some cases the product may be something the customer does not need. In one such example the utility offered commercial air-conditioner tune-ups. A majority of the site specific tune-up reports documented units that were clean and properly operating. However, because the service being offered was an air conditioner tune-up, the product being purchased by the customer was the minimization of potential problems rather than the tune-up itself. The risks perceived by the customer for not having the tune-up included increased maintenance costs, potential for service disruptions, higher utility bills from poor unit performance, and others. The marketing efforts in this program were successful at servicing the customer's need for risk minimization through a multiple marketing approach.

In another example, a Wisconsin brewery new that if it could reduce production costs by a penny a gallon it could compete with another brewery for distributors in a distant major metropolitan area. The Wisconsin company considered:

- participation in an energy program to optimize brewery process energy,
- investment in better product distribution equipment, and
- investment in a subsidiary with a high rate of return.

While energy efficiency was one of the options considered as a cost reduction technique, the customer's goal was opening a new territory not attaining a more energy efficient brewery process. Energy efficiency was one of at least three paths leading to the desired result. Providers of energy services will want to communicate the range of products and services available through energy efficiency in a way that attracts the attention of the customer. Energy efficiency may be a means to and ends more often than a product on its own.

Table 1 provides examples of energy products and how they relate to customer goals. The information is taken from actual customers, customer goals, and program services.

As demonstrated in Table 1, the service provided may not have a direct relationship to the needs of the customer. However, the service is used as the vehicle to deliver the customer's needs. In order to market energy efficiency, providers must be free to work with customers to identify the value to the customer that can be delivered by the program.

While commercial and small industrial customers may need considerable help to understand how energy services can help achieve their goals, large industrial customers may already understand energy efficiency. In working with programs in Michigan and Wisconsin we found that larger industrial customers are receptive to appeals that directly market energy efficiency. This was confirmed by 74 trade allies in the upper midwest who provide energy services to commercial and industrial customers. Managers of these firms advised us they are more successful at marketing energy efficiency to larger industrials than to small industrial or commercial customers.

However, as with commercial customers, the industrial customers have specific needs which drive their responses to energy service programs. A large industrial customer is much more likely to make the linkage between the energy service and improved benefits/costs. Such firms often have staff or consultants who analyze and customize their processes and are knowledgeable about the potential for energy improvements. The commercial and small industrial customer often do not have the expertise to identify and implement energy efficient improvements or understand the degree of benefits available from these improvements.

TRADE ALLIES

In coordinating, managing or conducting 11 different evaluations of commercial programs in which trade allies marketed and delivered program services, we have had an opportunity to identify the strengths and weakness of using trade allies to help design, implement and market energy service programs. We have seen where the use of trade allies has worked for and against the interests of both the program and the trade ally. Recently we have noticed a trend to use trade allies to market programs. Some trade allies are beginning to perceive the utility as a competitor and have started to join together to prevent utility intrusion into their markets.

In past years, some trade allies had voiced concern about the program's ability to interfere with their customer relations. Trade allies have worked in a competitive environment for years and are aware that their success is directly tied to customer's satisfaction and loyalty. When participating with the utility, the trade ally did not view the utility a direct competitor. Collaboration with an energy provider was often seen as a marketing advantage or a way to hold on to existing markets. An emerging concern of trade allies is the uncertainty associated with the products or services the energy providers will be offering their customers. The utility, as an energy service provider, may make it more difficult to enlist trade allies as marketing collaborators. Even small trade allies, such as heating and air-conditioning dealers, or appliance retailers are aware that utilities are discussing energy service options that may influence their markets. Consulting and engineering firms are potentially threatened by utilities who want to offer their customers expanded services. This is particularly true when utilities see expanded services as profit centers rather than service centers. Many trade allies feel they will be left out as utilities begin to use their special

Table 1. Products and Valued Results From Marketing Energy Efficiency

Organization	Product	Goal	Results
Retail department store	Relamping	Lower lighting costs Improved lighting Reduced maintenance Improved 5 yr. profit Improved 10 yr. profit	Monthly cost decreased 29% 19% increase in light output 10 Yr. maint. cost down 24% $ 36,000 above 1st yr. costs $ 220,320 above 1st yr. costs
Brewery/distributor	Optimize energy *(motors, heating, refrig, recovery, pumps, storage)*	Lower production costs Open new territory	$.01/gal reduction Goal: 14% of new territory
Small private electric power plant	Motors & controls	Lower operating costs Lower maint. costs	18% on-site elect. savings 32% savings in 5 yr. maint.
Automotive assembly plant	Variable speed motors	More control over opps Less product rejects Lower refab work Satisfied workers	23% less line shut-offs 18% reduction in rejects 26% less refab work Reduction in complaints

relationships with customers to market new products and services.

Product distributors and retailers are beginning to warn suppliers about the consequences of teaming with utilities who want to bypass established market networks. Likewise, manufactures are beginning to protect their distributor networks as utilities approach them with offers of captured markets in return for direct purchase contracts. Utilities considering marketing programs via trade ally relationships will need to address these concerns with strategies that protect the trade ally. Utilities and their energy service subsidiaries may need to address these concerns before the appropriate public service commission or legislature as well.

Utilities that are successful at establishing joint marketing efforts with trade allies can benefit from the ally's experience and markets. Specifically, trade allies can benefit the utility's marketing efforts by:

- Taking a role in designing program services to meet customer's needs/values
- Helping to understand the operations of the market
- Helping to understand customer's decision making processes and timing
- Providing marketing advantages through direct customer contact or referral
- Utilizing preexisting markets and product distribution channels
- Providing a front-line for rapidly solving customer satisfaction problems
- Providing a pre-established service implementation and management structure
- Providing valuable feedback on customer acceptance and the need for product modifications

Trade ally relationships are not necessarily a panacea. Marketing energy services have been harmed by trade ally relationships. Usually these situations have resulted from miscommunication, poor trade ally contract, unrealistic expectations, and/or program resources not being linked to the program's, customer's or trade ally's needs.

Examples of situations in which trade ally involvement have "gone sour" include:

- Program resources being cut to unacceptable levels as defined by the trade ally
- The program did not budget customer problem resolution resources
- The trade ally was tied to a specific product and could not alter the service

- The product did not work as promised by the utility or as installed by the trade ally
- The utility over promised what the trade ally would/ could deliver
- The financial condition of the trade ally changed and the utility would not re-negotiate the relationship
- The trade ally did not understand and plan for the "excessive" administrative requirements
- The trade ally did not trust the performance of the selected technologies
- The trade ally signed-on to keep another trade ally from coming into their territory

In most cases trade ally partnerships provide a useful and productive arrangement for marketing energy services as a customer commodity. Two important aspects of successful trade ally relationships are clear communications between the parties such that each party is aware of their commitments and responsibilities, and program resources tied to these responsibilities in a way that allows program performance to be consistent with the customer's expectation and the expectations of the contracting parties. In each case where problems existed in the trade ally relationship, the problem was traced to nonequivalent expectations on the part of the customer, utility or the trade ally. Unfortunately, these problems often manifested themselves in the form of dissatisfied customers.

Most of the commercial programs evaluated by the authors involved some form of trade ally promotion. Results from these efforts ranged from very low levels of marketing effectiveness from hardware and retail trade allies to extremely successful marketing through the use of heating and cooling contractors and equipment distributors. Three of the programs evaluated included heavy trade ally marketing efforts. Two of these programs involved air-conditioner tune-ups and the third was the Wisconsin High Efficiency Motors Program. In each of these programs trade allies provided the major, or a major marketing channel for identifying and obtaining participants. The two air-conditioner tune-up programs used trade allies to obtain 53 and 49 percent of their participants. That is, each of these program obtained about half of their participants through their trade ally relationships. Because the motors program was promoted primarily by trade allies (motor distributors), the trade allies provided almost all of the customer contacts that resulted in the purchase of a high-efficiency motor.

FINANCIAL INCENTIVES

Many energy service programs provide incentives to commercial customers to encourage participation. We have recently worked with 4 programs providing a total of eight different direct financial incentives to commercial customers. Participation rates in these program ranged from 3 to 76 percent of the eligible businesses.[1] However, while these incentives worked to boost participation rates, they were not identified by the participant as primary reasons for participation. From the customers' perspective, the money they save on their monthly utility bill outweighed the influence of the incentive. However, the incentive played an important role in gaining the attention of the commercial customer. Incentives can provide a distinct marketing advantage but may not necessarily close the sale.

The current trend of reducing or eliminating incentives to promote program participation needs to be examined in relationship to other competitive marketing approaches. Service providers will want to examine the structure of the market and the competition to determine the appropriate incentive structure. We have found repeatedly that some commercial customers have cash-flow problems that stand in the way of participation. incentives can be used to ameliorate these. Energy service companies have found a lucrative business in eliminating the cash-flow problem for commercial businesses by giving back a share of the savings in exchange for a long-term contract.

Incentives have become common place in the United States. Almost every other industry, from cereals to automobiles, use incentives to attract customers. The right approach is to fine-tune the incentive consistent with the needs of the individual customer, the service needed, the pricing contract and the competition's offerings. Under increased competition service providers will want to examine the customer's financial position and determine the appropriate mix of financial incentives, shared savings, pricing, and contracting on a per product basis. This means an array of financial options for the customer to pick from to close the deal. The incentive may not be used by the customer, but serve as a marketing advantage during the initial contact and service presentation. Service providers who offer commercial customers a financial incentive will have a marketing advantage over those who do not.

With utilities weaning their programs from general, program-wide financial incentives, the marketing advantage that strategic financial incentives provide will play a part in identifying new customers and keeping current customers. Over the longer-haul, financial incentives will continue to play a role as utilities compete against each other for the same customers and as high volume customers learn they

can obtain financial incentives by demanding the incentive from their current provider in exchange for supply contracts.

COMMUNITY SUPPORT INCENTIVES

Two of the commercial programs we recently evaluated used community support incentives to promote their energy programs[2]. The incentives took the form of financial contributions from the program (utility) to organizations within the community. This method of promotion is based on the theory that a portion of potential participants will take part in the program at least in part because it will support a community need. This marketing method is similar to other financial incentives in that it involves payments in return for the installation and use of energy efficient technologies, but is different than direct financial incentives in that it links participation to a community good. The incentive is paid to someone or something other than the participant. This marketing strategy is similar to those used by retailers who donate a portion of their sales to a community cause.

In one community, the utility made an energy-savings based financial contribution to a local recreational building fund. The recreational building was generally supported by the community and community perception of the new building was generally positive. In this case it was theorized that support for the building would translate into increased interest in program, which would, in turn, translate into increased participation by commercial customers. In the second case, a financial contribution was made to the community. In this case, the program established expected savings levels linked to installed actions. The incentive was paid directly to the community organization in exchange for the estimated number of kilowatt-hours saved by the program.

In both cases the financial incentives proved ineffective. Neither of the community incentives produced significant responses from commercial businesses and were not mentioned during follow-up surveys with participants as a reason for participation or as providing a marketing advantage to the program. In one case residents generally supported the program but business owners were concerned about the tax consequences of a public structure. The use of community incentives, as reflected in these two cases, were not successful for marketing to commercial businesses. However, in both of these cases there was an absence of a direct relationship between the participating commercial business and the community incentive.

MASS MEDIA

Most of the programs we evaluated have used some form of mass media to promote their program and to boost participation. These have each had different levels of success ranging from participation rates greater than 70 percent to a low of less than 5 percent. As a result, it is not possible to conclude that the use of mass media, in itself, has a profound effect on program participation. In the mid 1980s, we concluded that mass media was important for informing customers about the general nature of an energy service, but commercial customers generally do not decide to participate as a result of exposure to the media. This continues to be true. In the 11 commercial programs we evaluated in the last 3 years, participants continued to advise us that they were exposed to the mass media, that they recalled the promotional material, and that in many cases the material was their first exposure to the program. However, few participants indicated mass media provided the information they used to decide to participate.

The mass media did provide program legitimacy and a method by which additional information could be obtained. It often provided the first exposure to the program, provided information that the program existed, opened the door for additional information and established the product or service concept in the customer's eyes. In most cases it was additional information not included in the mass media but in more targeted marketing approaches that lead to the customer's participation. The value of the mass media is that it provided the marketing foundation from which other marketing appeals could be staged. The media used in these programs included newspaper advertisements, stories and announcements, and radio promotion. Few programs used television, although some were covered by television during the community announcements or during local news stories.

We conclude that the use of mass media can be an important tool for spreading the word, but it should not be relied upon as the promotional method to engage commercial participants unless it is linked to other more direct or targeted promotional materials or events.

DIRECT MAIL

Direct mail was successfully used in several programs to both inform commercial customers about the program and to boost participation. Targeted direct mail, promoting specific technologies, in general, worked better than mass mailings or mail presenting multiple program elements that did not specifically apply to a business. In several programs, participants informed us that they both recalled the mailing and were influenced by the material. This was especially true in a large program implemented across a service territory. In this program, the targeted mailing presented relamping information that was mailed to commercial businesses identified through billing account classifications. The program was actually limited because of over enrollment.

In another program, brochures were sent to targeted business with a high potential of having a specific type of air conditioning equipment. In this program the brochure was the second most effective method of presenting the program, next to direct contact from a trade ally [5]. However, we suspect that if free-riders could be eliminated, direct mail would have been as effective as trade ally contacts. In each of these cases program staff members were available to address customer's inquires about the program and to help the customers through the enrollment process and implementation phase. Also, trade allies supported the program enrollment by assisting interested customers reached by direct mailings.

Several other programs used direct mail approaches to other marketing appeals. In two almost identical programs offered by two different utilities, the company using direct mail marketing was almost twice as effective in providing the "most important information source in the form of a program brochure" as the utility that used program brochures but did not directly mail them to potential participants. The second utility relied on customer call-ins and trade allies to distribute their brochures.

One key to the success of direct mail promotion is segmenting the customers so direct that mail material is targeted to customers with a high probability of needing/wanting the program (or of being convinced that they need the program). In one case, trade allies were helpful in identifying customer segments that were appropriate for targeted mailings. In another, SIC codes and commercial account data were merged to identify a specific segment of the retail market that had a high potential of being receptive to the program. In each of these cases the key to the success of the targeted mailing was the segmentation process.

In two customer surveys managed by the authors, commercial customers were asked which marketing methods would be the most effective at gaining their attention. The majority of customers responded that direct mail would be from four to ten times more effective than other marketing methods including bill stuffers, trade allies, personal contact by program representatives, newspaper adds, and mass media, among others.

TELEMARKETING

Several programs we evaluated used telemarketing to market the program and to identify potential participants. In all cases, calls were linked with mail appeals either prior to the call or as a follow-up to customers indicating an interest. Telemarketing served to determine customer interest and to schedule a follow-up mailing. In one program, a follow-up visit was scheduled with the customer if the efficiency improvement looked attractive enough to the service provider.

In another program telemarketing follow-up calls were linked with targeted direct mail. If after receiving the direct mail and the follow-up phone call the customer indicated an interest in the program, a program folder containing detailed participation information and an application form was mailed to the customer. This three contact approach (mail, call, mail) proved so effective that program marketing had to be slowed to guard against over subscription. However, it should be noted that the utility was able to identify a large group of commercial customers with a pre-existing interest in the program from the utility's 800 energy information hot-line. The 800 number served as a method of segmenting the market for the mail-linked telemarketing appeal.

COMMUNITY GROUPS AND COMMUNITY ALLIES

In several programs evaluated by the authors as part of the Wisconsin Demand Side Demonstrations, community groups were used to both plan and promote programs to the commercial businesses located within their respective communities. Results of these efforts were not clear. A couple of the community groups were very successful at influencing participation.[2] In one community the fire department promoted the installation of energy efficient exit lights with a high level of success. In another community, the official community group formed to assist the program was not successful at boosting participation. However, an informal group of business owners in this community helped to achieve a program participation rate of 76 percent of the commercial businesses in a relamping program.

Other programs using community groups had mixed results falling between the two extremes presented here. These results suggest that community groups can play an important role in marketing energy services if the group is established and is already an effective part of the local business community's structure. However, it remains unclear if the enhanced program enrollment in these communities were a result of the community groups involvement or because the community groups existed in some of the communities. It may be that marketing to a community with a strong business network is more effective than enrolling community groups in the planning and implementation process.

DEMONSTRATIONS AND CASE STUDIES

Marketing energy services through demonstrations and case studies is a widely used approach. It is often assumed that

demonstrations provide a visual confirmation of the application or technology in which customers will place their trust. It is thought that demonstrations help to educate the customer and move the customer's concept of the technology through the promotional phase to a concept of performance in "a business like theirs."

Demonstrations are popular with customers and do provide educational benefits but there is an absence of data to demonstrate their impact on the market. It is unclear whether individuals attending the demonstrations are the same people who benefit from the technology. In several demonstrations for which we have examined visitation records or conducted interviews with the demonstration managers, we have found that the majority of the demonstration attendees had little need for the technology. In others demonstrations were visited by individuals that were directly involved in business activities that directly speed penetration of the demonstrated technology. The lesson seems to be that the methods for promoting the demonstration are more important than "conducting a demonstration". A demonstration of a new technology or application technique that is visited by retired seniors or grade school tours may have less of an marketing impact than a demonstration that is conducted via strategically targeted invitations with follow-up contacts.

During discussions and surveys with hotel/motel owners and managers, we were advised that demonstrations and case studies can go a long way in convincing them that energy efficiency technologies provided reliable, cost-effective performance relative to their current practice. They also told us they wanted to see the recommended technologies installed and operating in several hotels, over several years, with data and testimonies supporting the recommended technology. While a single demonstration project would be informative and would act as an information diffusion mechanism, the owners and managers wanted to see the practice in actual hotel/motel installations with enough operational and maintenance data to guarantee a cost effective conversion. While the demonstration is important to these customers, supportive case studies and perhaps testimonials may be important for closing the sale.

Recently a member of our team visited seven energy efficient technology demonstration centers across the United States. The focus of the visit was to determine if the demonstrations were effective at convincing their target audiences to adopt the recommended technologies. The majority of the attendees at these technology centers did not belong to the targeted markets they were designed to influence and none of the centers had conducted evaluations to determine if the demonstrations changed the behaviors of the target segments. In addition, few of these centers provided information on case studies supporting the demonstrations.

In a daylighting demonstration implemented by the State of Wisconsin as part of the Wisconsin Demand Side Demonstrations an office building fitted with daylighting controls was examined by the authors. The building houses the engineers and architects that establish building and lighting standards for the State of Wisconsin. During the two years following the study state architects and engineers located in the building provided demonstrations and walk-through tours of the project to visiting architects and engineers. Because this project was implemented in an office building receiving routine visits from practicing architects and engineers, the educational benefits of this demonstration may be significant. However, as with other demonstrations, there is an absence of information pertaining to who has visited the facility and the degree to which visitors used the information demonstrated in their building designs.

While we have found limited data on the impacts of demonstrations on customer purchase decisions, we suspect they are excellent educational tools because of their popularity with visitors. However, for them to be effective marketing tools they may need to be supported with case studies from customers who have purchased and installed the technology and can provide testimonials of cost effective performance. In addition, in order to be able to measure the effectiveness of demonstrations and case studies, the organizations providing the demonstrations must keep records on the people exposed to the demonstrations so that they can be contacted to measure the influence the demonstration had on their purchase decisions.

BILL STUFFERS (enclosures)

Bill stuffers promoted two recent commercial programs evaluated by the authors. Both of these programs provided incentives in the form of rebates to encourage the installation of efficiency measures. One program provided incentives based on the installation of each covered technology, while the other based the incentive on the package of measures installed. In both cases the bill stuffers supplemented other methods. From 10 to 15 percent of participants indicated the bill stuffer provided information leading to their participation. However, the majority of both participants and non-participants did not recall the stuffers which were included in multiple mailings. Bill stuffers may be cost effective, but they should not be relied upon as a primary marketing method.

WHAT COMMERCIAL CUSTOMERS TELL US

In an effort to identify the marketing methods that commercial customers advise us work best for them, the authors planned and directed two marketing surveys with 300 com-

mercial customers. Two hundred of these customers took part in one of two different utility programs. That is, the surveys included 100 participants in each of two different utility service territories, covering two different programs targeted to their commercial customers. An additional 100 non-participating commercial customers were also surveyed (50 in each territory) to use as a control group. The results fit very well with other marketing results presented in this paper and are combined and presented in Table 2. As indicated in Table 2, commercial customers identified direct mail approaches as the two most effective marketing methods. This is followed by bill enclosures, trade ally contacts, utility contacts and other marketing approaches.

Table 2. *Marketing Approaches Identified As Most Effective By Commercial Customers*[5] *(Percent of customers responding)*

Marketing Approach	Percent of Participants	Percent of Non-participants
Direct mail brochures	55	52
Personalized letters	22	18
Bill enclosures	19	17
Trade allies	15	4
Utility telephone contact	14	18
Personal contact by utility reps	9	6
Messages on bills	7	7
Workshops, seminars, presentations	4	3
Newspaper	4	2
Television	1	4
Contact with other businesses	2	-
Other methods	9	-
(n)	200	100

SUMMARY

Most strategies for marketing energy efficiency programs, or services work to some degree. However, marketing strategies that rely on proven techniques for their primary marketing methods, (direct mail, telemarketing, follow-up mailings, trade ally contacts and referrals, follow-up contacts and personal visits) may be enhanced by the addition of other marketing methods that are minimally effective on their own (newspaper, radio, TV, bill stuffers, mass mailings, messages on bills, etc.). Regardless of the marketing strategies, however, the ability of the service provider to design products and services that offer the customer real value is essential to any successful marketing campaign. This is especially true for marketing programs fielded in a competitive environment.

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