

## Marketing, Education and Outreach Program

	Mission	IOU COMMENTS
SW Program: <b>Marketing, Education &amp; Outreach (ME&amp;O)</b>	Increase consumer awareness and participation in demand-side management activities and to encourage behavior changes that save energy, reduce greenhouse gas emissions, and support clean energy solutions.	IOUs suggest minor edits to the mission statement as follows:  Increase consumer awareness, knowledge, and participation in demand-side management activities and to change attitudes and encourage behavior changes that save energy, reduce greenhouse gas emissions, and support clean energy solutions.

<b>CA EESP Goals/Strategies Addressed by SW Sub-program:</b> Create and launch an integrated, statewide Marketing, Education and Outreach effort for Energy Efficiency, including an energy efficiency brand, resulting in high levels of awareness statewide of the value of energy efficiency that leads to strong demand for energy efficient products, homes and services	<b>CA EESP Ref. pp. #</b>
<b>Strategy 1-1:</b> Establish a recognizable and trustworthy brand for California's Energy Efficiency and other DSM consumer products & services <b>2010-2012 Near Term:</b> <ol style="list-style-type: none"> <li>1. Research appropriate look and meaning of a California efficiency/GHG reduction brand: (done)</li> <li>2. Launch integrated efficiency/DSM brand in 2010</li> </ol>	p. 82
<b>Strategy 1-2:</b> Develop an integrated marketing plan for all Californians. <b>2010-2012 Near Term Goals:</b> <ol style="list-style-type: none"> <li>1. Conduct SW segmentation research, on interests, awareness and attitudes/perceptions related to EE and GHG messaging (done);</li> <li>2. Establish objectives and metrics for public campaign;</li> <li>3. Develop targeted and highly relevant EE and DSM marketing messages to incite behavior change/action;</li> <li>4. Create partnerships with private industry and businesses to help motivate consumer and business</li> </ol>	p. 82

sector action; 5. Define deliverables for each strategy.	
<b>Strategy 1-3:</b> Use social marketing techniques to build awareness and change consumer attitudes, and perceptions. <b>2010-2012 Near Term Goals:</b> 1. Develop a roadmap for a social marketing approach including exploration of behavioral science principles.	p. 82
<b>Strategy 1-4:</b> Develop a California energy efficiency web portal with statewide information on GHG reductions, efficiency and DSM awareness and options. (done in Sept. 2010) <b>2010-2012 Near Term Goals:</b> 1. Develop initial web portal for the energy efficiency/DSM industry 2. Begin pilot programs in using web portal	p. 82

Short-term (2010-2012) "SMART" <u>Sub-program Objectives:</u>	Source (SP, AL, DR, PIP, or Staff)*	IOU COMMENTS
<p>1. By 2012, increase awareness and knowledge of Engage360 brand among targeted IOU customers by X and Y percent ( IOUS will submit research regarding what X and Y will be in their 9/29 document).COMMENT: the X and Y will not include any bump the brand might get from any additional programs.</p> <ul style="list-style-type: none"> <li>- these numbers might be impacted by IOU cobranding which is not expected to happen until the end of the cycle, at the earliest.</li> <li>- numbers will be CAVEATED with comparative categories, etc.</li> </ul>	SP, PIP	<p>The PIP does not address how the program will be implemented.</p> <p>The IOUs propose that the objectives require the timing of program implementation. Specific program implementation will occur in a two-stage process wherein the bulk of the 2010-2012 cycle will be dedicated to the first stage, "Grassroots Outreach and Networking." During this first stage, a representative focused group of influencers will be targeted through one-to-one and one-to-many marketing efforts. In the second stage, which is unlikely to begin until earlier than the end of the 2010-2012 cycle, the program will target segments of the general population comprising "high EE propensity" California adults (see the ME&amp;O segmentation study for details) v</p>

		<p>targeted in a broader marketing effort. The 2015 cycle will be dedicated to the second stage of the campaign, and the objectives for that cycle should emphasize the second stage.</p> <p>Given this phased roll-out of the program, we propose the following objective for the 2015 cycle that emphasizes phase one:</p> <p>By 2012, increase awareness and knowledge of the Engage360 brand among those customers targeted by the "Grassroots and Social Networking" program efforts by 10 percent and 5 percent, respectively.</p>
<p>2. By 2012, increase in awareness and knowledge of specific energy efficient actions among targeted IOU customers..</p>	<p>Staff</p>	<p>IOUs would like to modify this as follows:</p> <p>By 2012, increase the number of specific self-reported energy efficiency actions among targeted IOU customer groups specifically targeted by the initial phase of the program.</p>
<p>3. By 2012, increase the number of specific self-reported energy efficiency actions by targeted IOU customers.</p>	<p>SP, PIP</p>	<p>IOUs would like to modify this as follows:</p> <p>By 2012, increase the number of specific self-reported energy efficiency actions among targeted customer groups specifically targeted by the initial phase of the program.</p>

**Discussion regarding objective/PPM 1:** Don: brand awareness is part of the campaign. Why Was the metric removed?

Simon: brand awareness was removed since it was an intermediate step.

Wendy: brand awareness will always be important and we will always monitor it. If awareness drops, we re-evaluate how to get it back in the limelight.

Needs to be persistent.

Don/Wendy: the concept is three-step: awareness, knowledge, consumer behavior modification.

Jennifer: to say the brand is different from driving customers to programs is incorrect?

Wendy: There aren't any programs bundled into SW program. They are at IOU level. The actual consumer action does not happen on SW level. It happens at IOU level/rebate. The brand will not do that.

Carol C.: at program-specific level, we ask where consumers learned about program.

Wendy: we can measure when someone goes from SW brand to a program.

It will be individual IOU staff, not E360, to push people to programs. Should E360 be responsible for customer program sign-up?

Wendy: brand will hit in 2011. program finder is on web portal, but how much should we track in a year's time?

Not possible to track all actions from E360.

Sara: there will be some co-branding (SW/IOU level). Carmen: we were taking the next step from awareness

Don: we feel it's too early to take that step.

Simon: 2010-2012 is just time to build the brand? 2013-2015 would be better time frame, and what we propose here would be better identified as LT metrics (2013-2015)??

Yes.

jennifer: 2013-2015 would measure the drive from "awareness" to programs.

Don:

Brian: We have baseline on SW knowledge, awareness, etc. We don't have similar program-specific

Short-term <u>Sub-program</u> PPMs:	Source (SP, AL, DR, PIP, or Staff)*	Metric Type (2a or 2b)**	Baseline Study Required (Y/N)	IOU COMMENT
1. Awareness and knowledge of the Engage360 brand.	SP, PIP	2a  IOUs suggest this be changed to a 2b metric given the late launch of the campaign	N	The IOU's proposed metric is as follows: Awareness and knowledge of the Engage360 brand among customers specifically targeted in phase one ("Grassroots Social Networking" program). <i>This metric does not have a baseline since the starting point is 0, however tracking will require ongoing tracking.</i>
2. Awareness and knowledge of specific energy efficient actions.				The IOU's proposed metric is as follows: Awareness and knowledge of energy efficient actions by the program audience.

		2b	Y	customer groups specifically targeted in phase one ("Grassroots Social Networking") program. <i>Need baseline for awareness and knowledge of "specific" EE actions.</i>
3. The number of self-reported specific energy efficiency Actions.	SP, PIP	2b	Y	The IOU's proposal includes the following: The number and type of energy efficiency actions self-reported by customer groups specifically targeted in phase one ("Grassroots Social Networking") program. <i>Current baseline assesses specific</i>

\*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

\*\*Metric type: 2a = reported annually, 2b = reported by end of cycle.

Long-Term (2013-2020) "SMART" <u>Sub-program</u> Objectives:	Source (SP, AL, DR, PIP, or Staff)*	IOU COMMENTS
1. By 2020, xx% of Californians will have taken EE/conservation actions	SP, PIP	In order for IOUs to provide substantive suggestions for these percentages, we would require more time to contemplate and to gather input from other key stakeholders.
2. By 2020, xx% of Californians are aware of energy management strategies including EE, E conservation, DR and DG.	Staff	In order for IOUs to provide substantive suggestions for these percentages, we would require more

		time to contemplate and to gather input from other key stakeholders
3. By 2020, the average number of actions taken per household will have increased by xx %.	Staff	In order for IOUs to provide substantive suggestions for these percentages, we would require n time to contemplate and to gather input from other key stakeholders
4. By 2020, the percent of Californians that consider themselves an EE advocate will increase by x%.	Staff	In order for IOUs to provide substantive suggestions for these percentages, we would require n time to contemplate and to gather input from other key stakeholders
5. By 2020 percent reduction in targeted households average energy consumption.	SP, PIP	In order for IOUs to provide substantive suggestions for these percentages, we would require n time to contemplate and to gather input from other key stakeholders
6. By 2020, increase the conversion of targeted customers to a Smart Energy Lifestyle by x%.		In order for IOUs to provide substantive suggestions for these percentages, we would require n time to contemplate and to gather input from other key stakeholders
7. By 2020, the percent of resource program participants channeled via ME&O activities will exceed X%.		In order for IOUs to provide substantive suggestions for these percentages, we would require n time to contemplate and to gather input from other key stakeholders

\*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]

<b>Long-Term Sub-program MT Indicators:</b>	<b>Source (SP, AL, DR, PIP, or Staff)*</b>	<b>Metric Type (3)**</b>	<b>Baseline Study Required (Y/N)</b>	<b>IOU COMMENT</b>
None proposed.				

*\*SP=Strategic Plan, AL=Advice Letter, DR=Data Request Response, PIP=program plans, Staff=ED proposed. [Include page reference when applicable.]*

*\*\*Metric type: 3 = data collection, tracking, and reporting [by IOUs, CPUC staff, and/or other entities] to be determined later.*