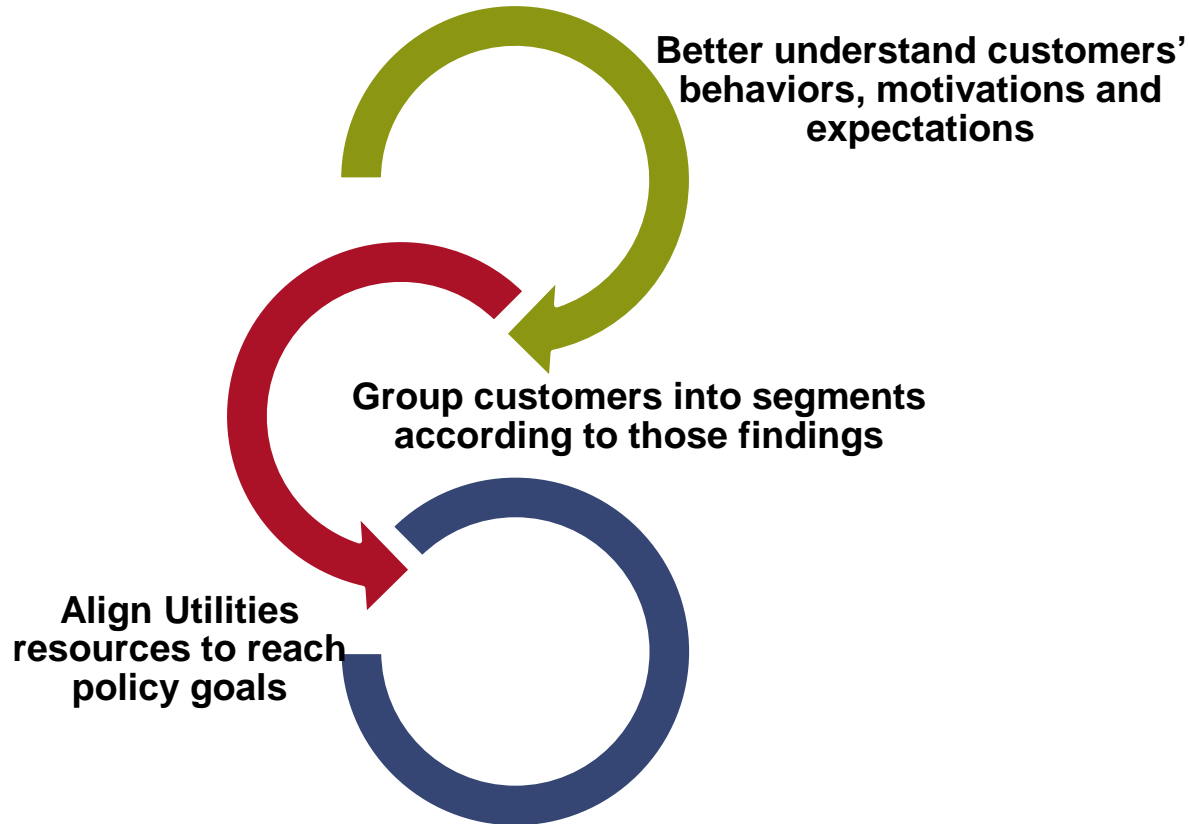




Why Segmentation?



RESIDENTIAL CUSTOMERS

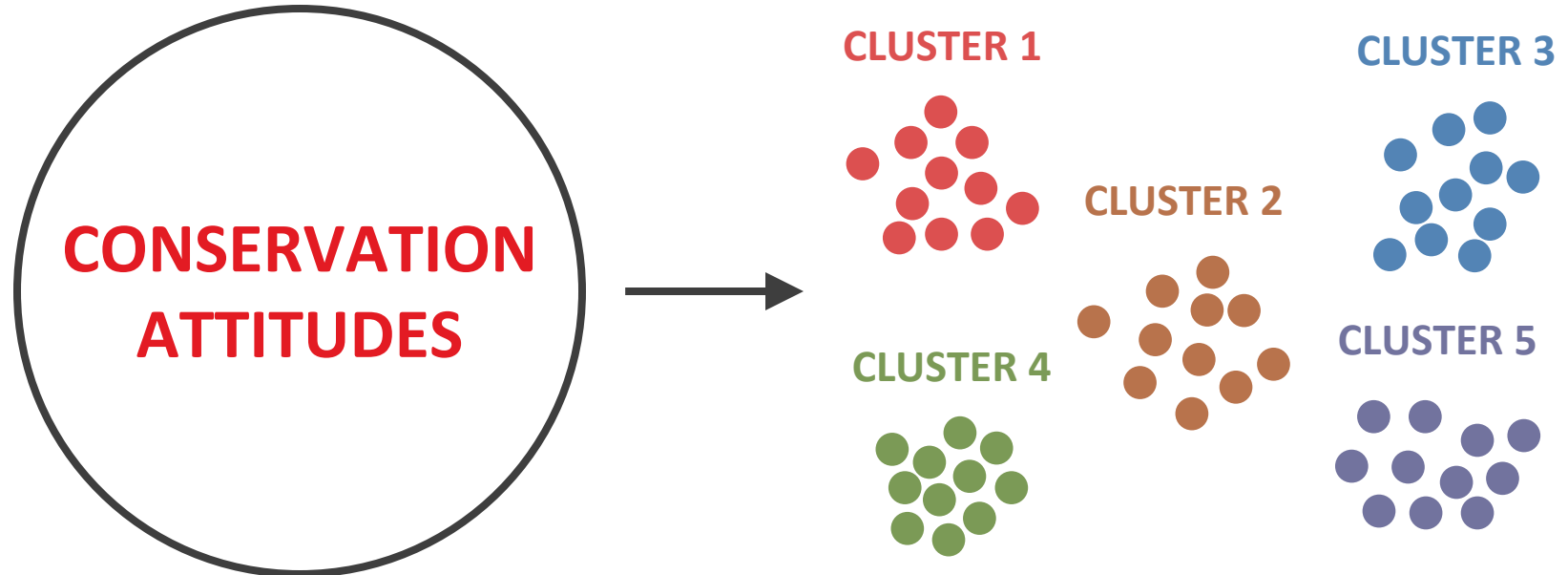
Telephone Survey
n = 1,000

- Satisfaction with Utilities
- Conservation attitudes
- Conservation participation
- Communication preferences
- Demographics

COMMERCIAL CUSTOMERS

**In-depth
Interviews**
n = 46

- Relationship with Utilities
- Utilities attitudes
- Conservation participation
- Conservation motivation
- Communication preferences



FOR EXAMPLE:

- *I consider the environmental impact that my water and electricity use will have on the community.*
- *I am more likely to participate in conservation programs if there are clear cost savings.*
- *The City of Fort Collins' Climate Action Plan goals motivate me to reduce my water and electricity use.*

LAYER IN:

- Usage data
- Satisfaction with Utilities
- Conservation programs
- Demographic characteristics

Enthusiastic Conservationist



- Environmental/economic impacts factor heavily into decision-making
- Supportive of Climate Action Plan

Cost-Driven Users



- Cost, comfort drive usage decisions
- Willing to participate in conservation programs for cost savings

Receptive but Busy



- Environmental/economic impacts important but very time-conscious
- Willing to participate in conservation programs

Neutral Users



- Neutral about conservation
- Neutral toward Climate Action Plan

Unmotivated to Conserve



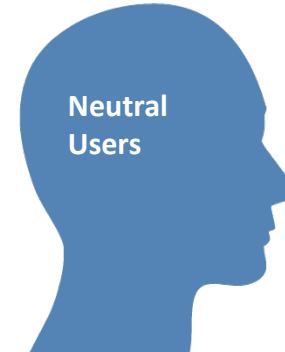
- Cost, comfort, convenience drive usage decisions
- Generally disinterested in conservation programs

Demographic profiles



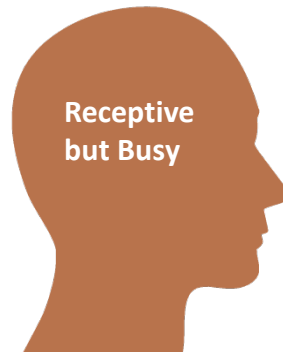
Enthusiastic Conservationists

- Older
- Live in an apartment
- Minorities
- Retired
- Lower incomes



Neutral Users

- Younger
- Live in an apartment
- Do not have children
- Not Republican
- Lower incomes



Receptive but Busy

- Homeowners
- Minorities
- College educated
- Have children
- Democrats



Cost-Driven Users

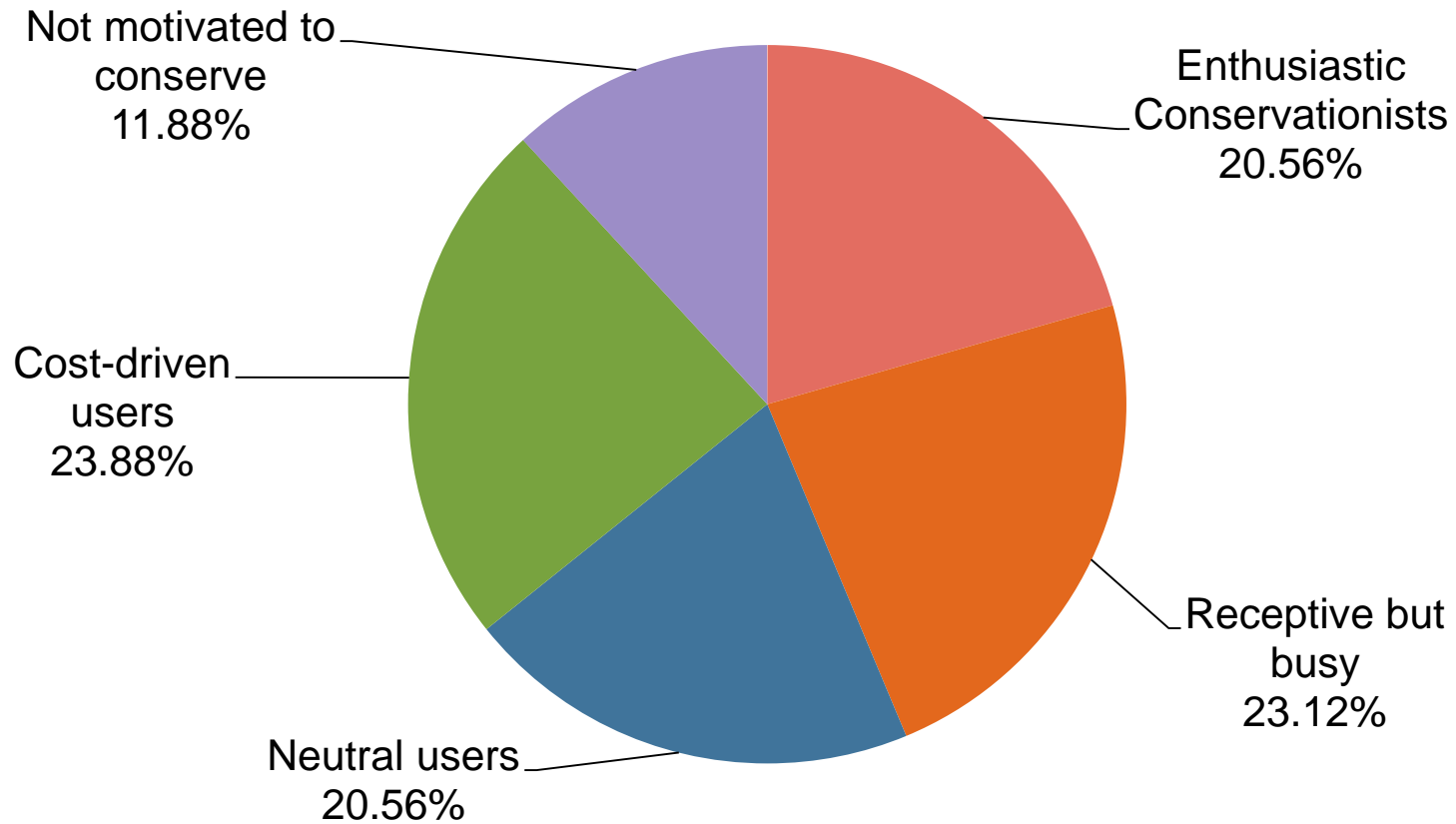
- Younger
- Live in a single-family home
- College educated
- Republican
- Higher incomes



Unmotivated to Conserve

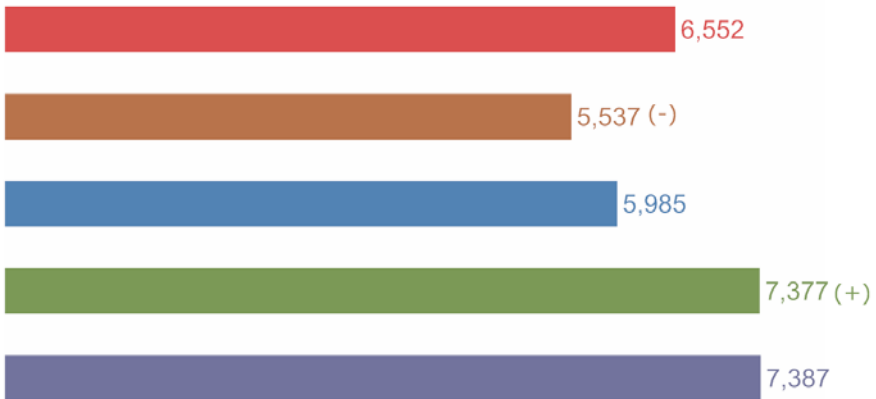
- Homeowners
- Caucasian
- Have children
- Republican
- Higher incomes

Residential Customer Segments

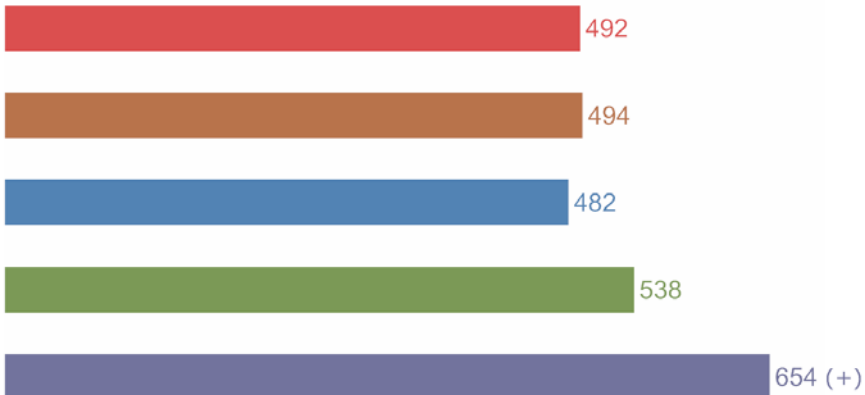


Electric and water usage

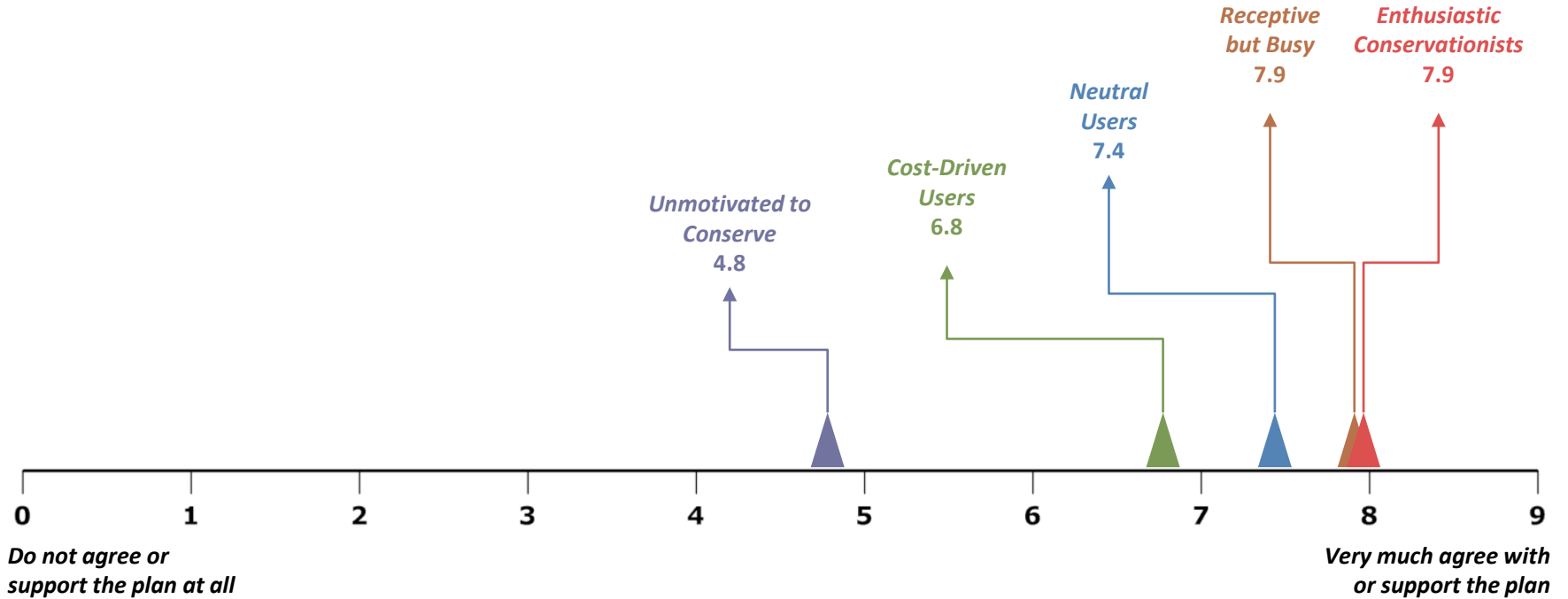
Average Water Usage (gallons)



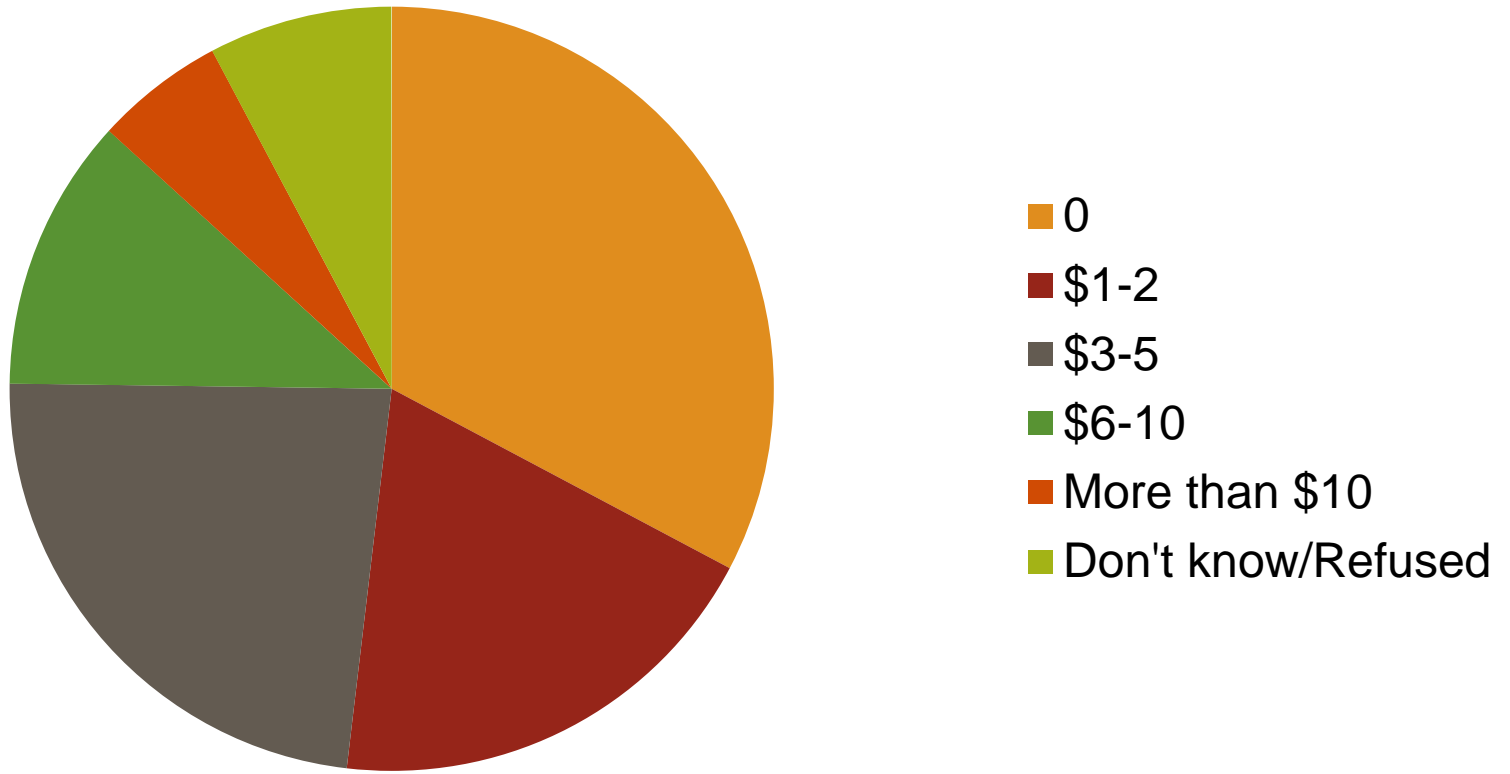
Average Electricity Usage (kWh)



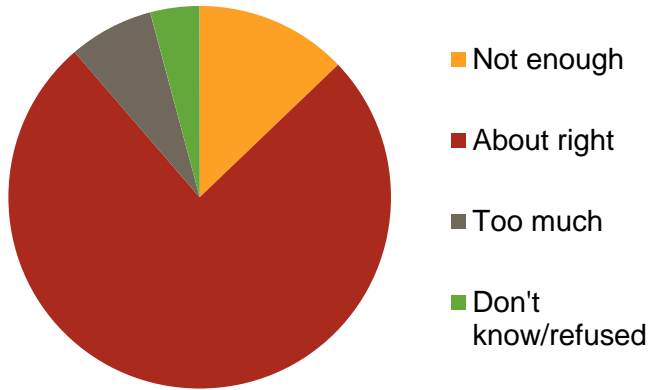
Support for Climate Action Plan



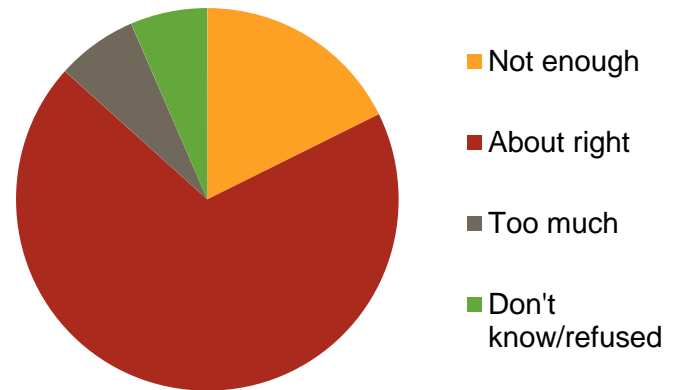
Amount customers are willing to pay additionally per month to support CAP



Fort Collins Utilities emphasizes the importance of ENERGY efficiency and conservation at a level that is:

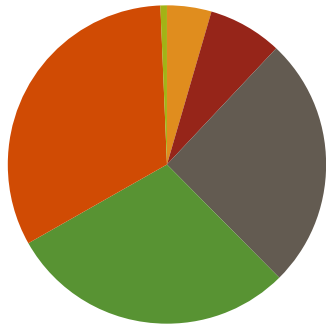


Fort Collins Utilities emphasizes the importance of WATER efficiency and conservation at a level that is:



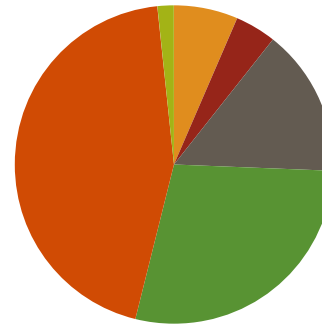
Utilities Customer Survey Results- Residential

I take the time to learn more about conservation in an effort to make better energy and/or water use decisions



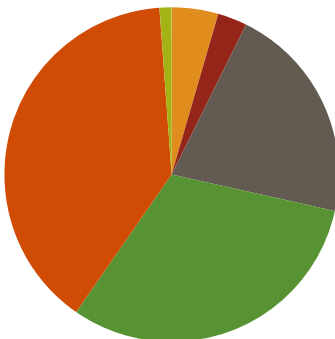
- Strongly Disagree
- Disagree
- Neither
- Agree
- Strongly Agree
- Don't know/Refused

I am interested in using new energy efficiency devices such as programmable thermostats and energy use displays



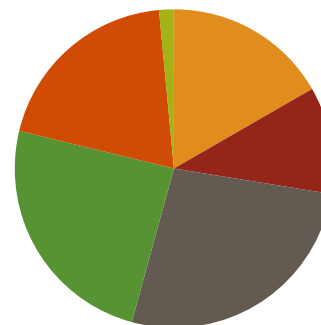
- Strongly Disagree
- Disagree
- Neither
- Agree
- Strongly Agree
- Don't know/Refused

I expect the City of Fort Collins to lead the way to a clean energy future through investment in or support of community based solutions



- Strongly Disagree
- Disagree
- Neither
- Agree
- Strongly Agree
- Don't know/Refused

I support charging more for energy used during peak periods of the day when it costs more to generate energy



- Strongly Disagree
- Disagree
- Neither
- Agree
- Strongly Agree
- Don't know/Refused

Commercial Customer Segments

Environmentally-Conscious



- Engaged, proactive, and enthusiastic about conservation
- Motivated by the communal good (and cost savings)

Environmentally-Flexible



- Environmentally-conscious to some degree
- Motivated most by cost savings and company image

Cost-Oriented



- Largely indifferent toward conservation
- Motivated largely by cost-savings

Environmentally-Conscious



Environmentally-Flexible



Cost-Oriented



ACCOUNT SIZE

More likely to be Key Accounts

More likely to be small accounts

Account size varies

TENANTS

Majority do not have tenants

Majority do not have tenants

Most likely to have tenants

RENT/OWN

All own their properties

Most likely to rent

More likely to own

% of BUSINESSES

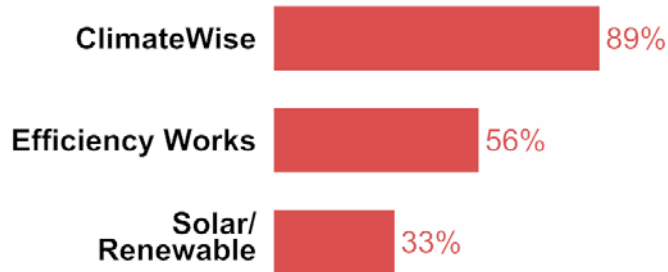
20%

48%

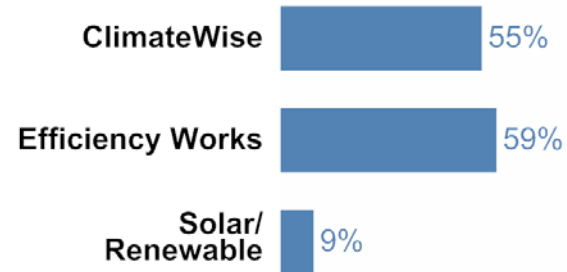
33%

Participation in Conservation

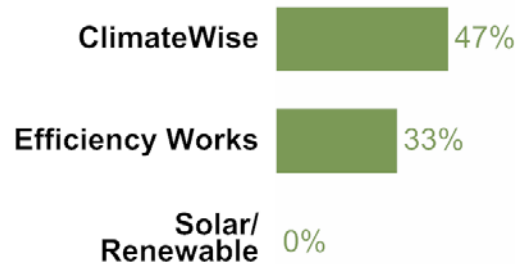
Environmentally Conscious



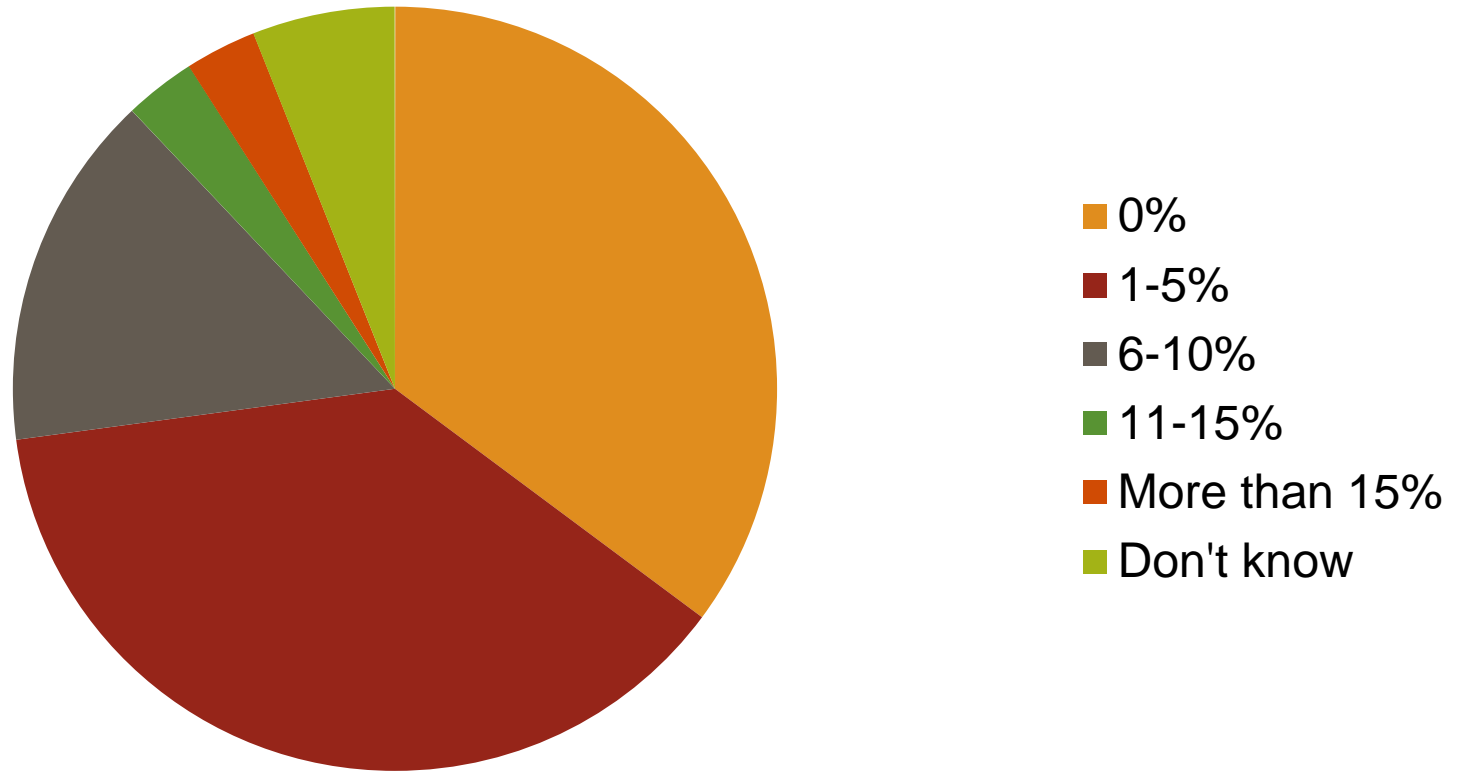
Environmentally Flexible



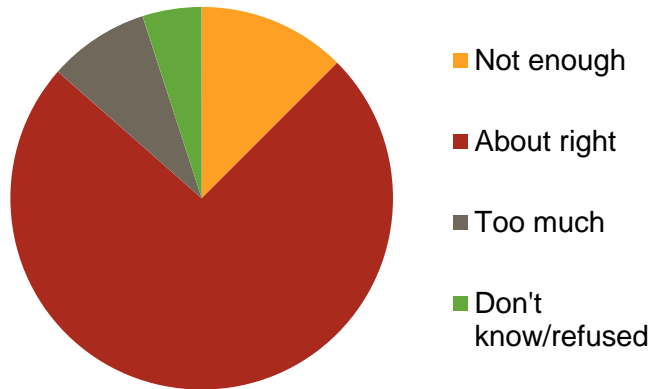
Cost-Oriented



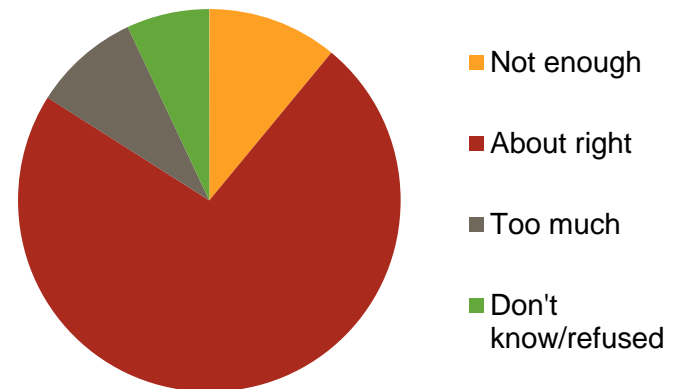
**Amount customers are willing to pay additionally
per month to support CAP**



Fort Collins Utilities emphasizes the importance of ENERGY efficiency and conservation at a level that is:

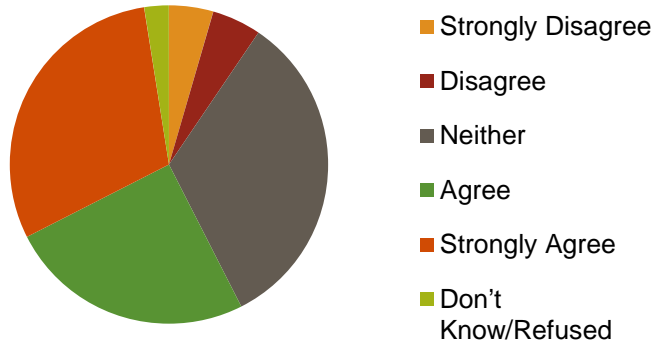


Fort Collins Utilities emphasizes the importance of WATER efficiency and conservation at a level that is:

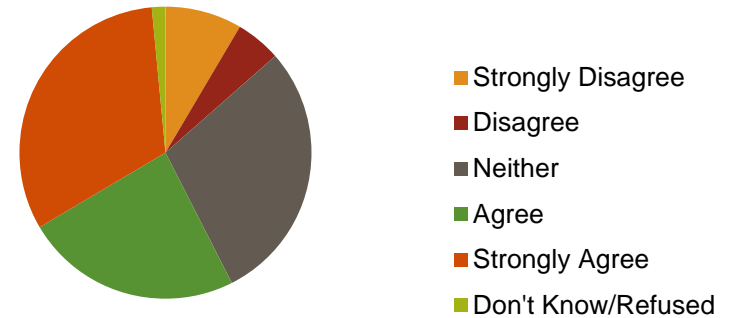


Utilities Customer Survey Results – Small/Medium Commercial

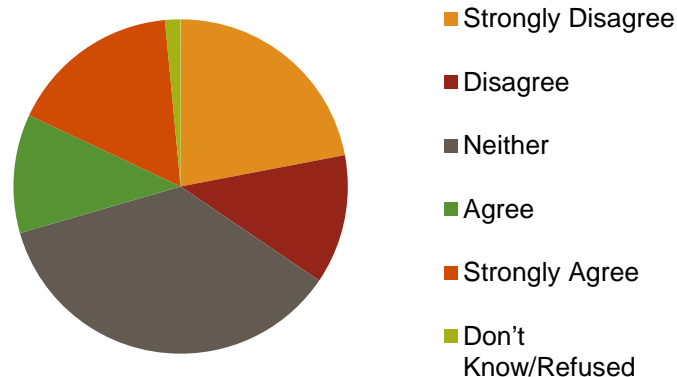
My organization takes the time to learn more about conservation in an effort to make better energy and/or water use decisions.



My organization expects the City of Fort Collins to lead the way to a clean energy future through investment in or support of community based solutions such as solar gardens, on-bill financing for efficiency upgrades, and contractor certification.



My organization supports charging more for energy used during peak periods of the day when it costs more to generate energy.



Next Steps for Fort Collins Utilities

Update engagement plan

- *Re-evaluate techniques*
- *Major segments and Key Accounts*

Program planning

- *Disseminate segmentation and customer preferences*
- *Develop programs based on strategies*

Marketing strategies

- *Identify segments, neighborhoods, and groups of likely participants*
- *Match key messages to customer preferences*

Thanks!

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970-224-6123