



Electricity Consumers, Conservers and Citizens

Ontario Energy Association

Toronto | October 7, 2019

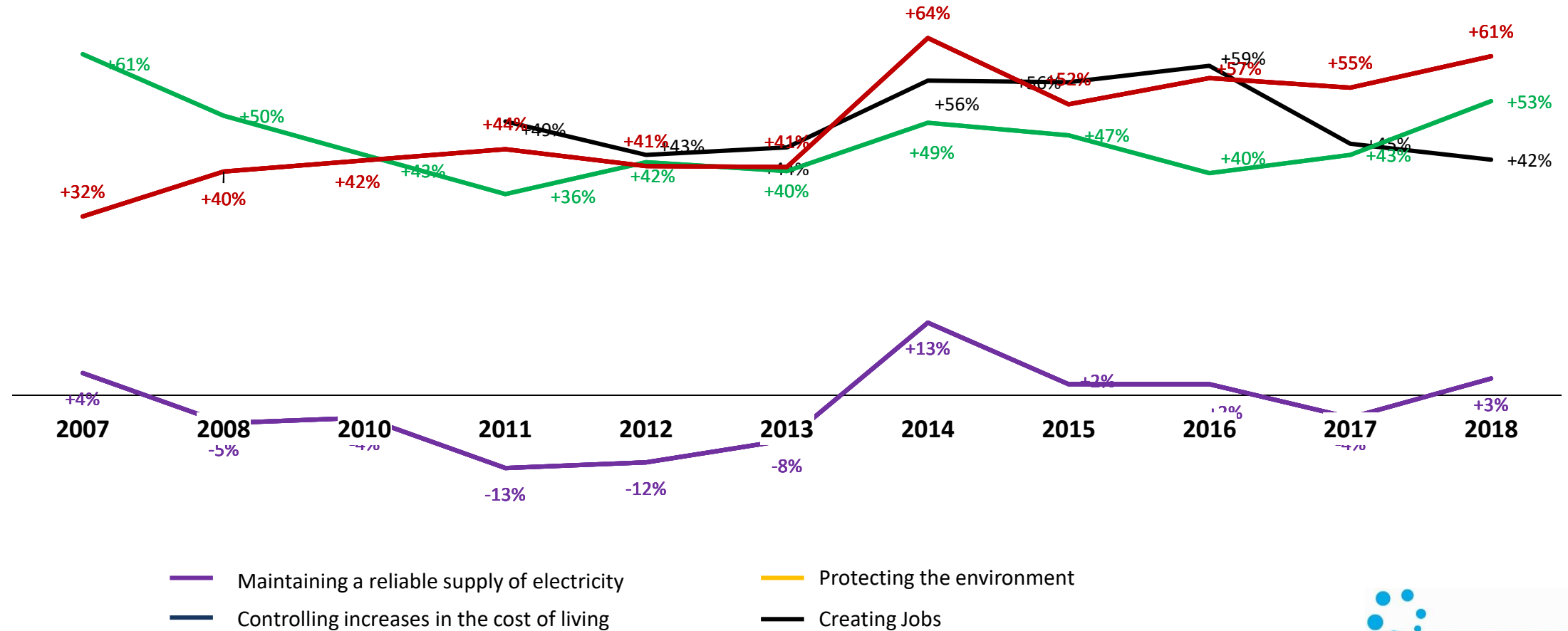
What Problem are you Solving?



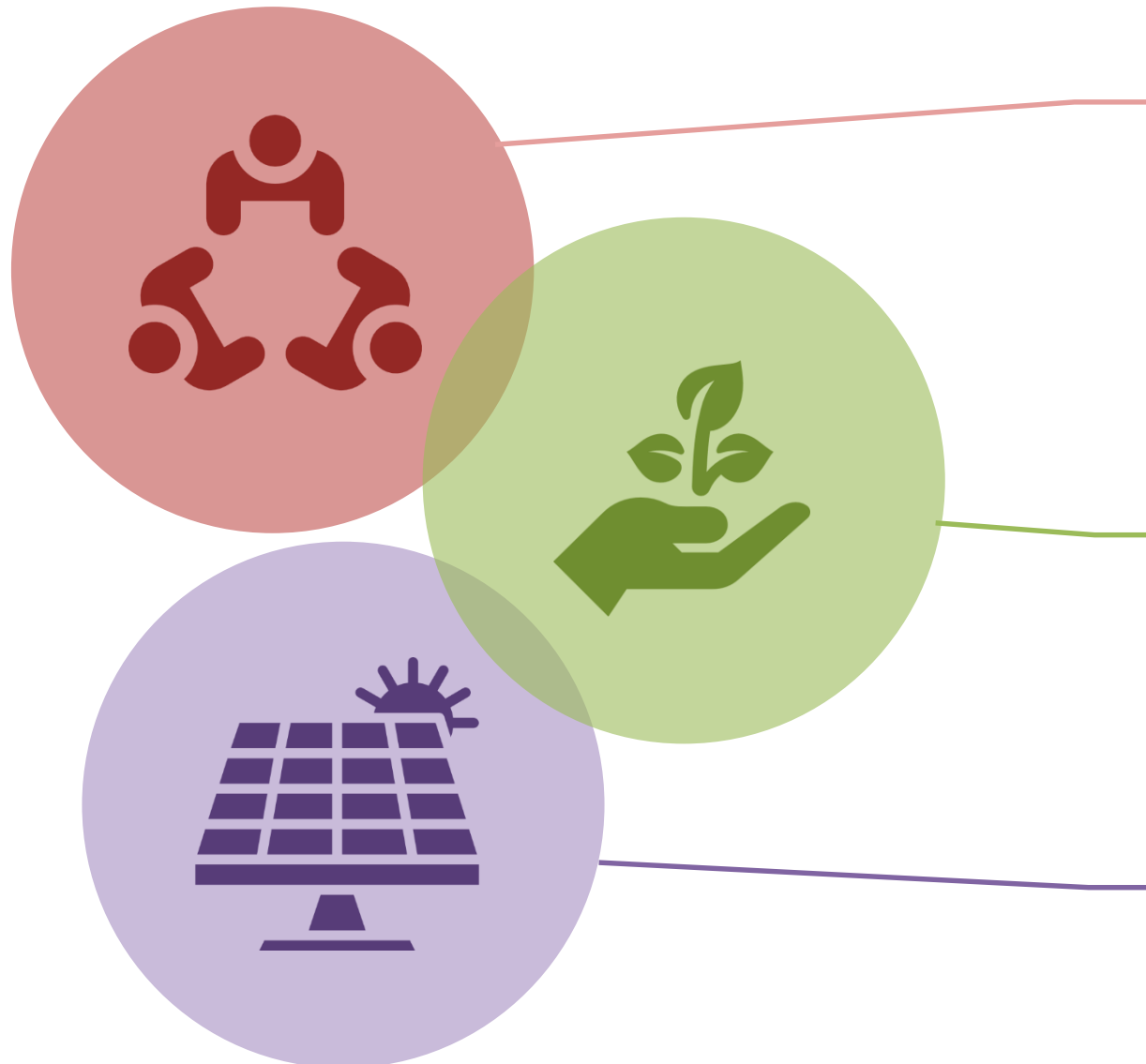
Please tell me how urgent you feel each of the following problems are in your community:

[NET URGENCY = (Critical problem + Significant Problem) – (Not really a problem)]

[asked of all respondents; n=600]



Circles of Engagement: There are three different ways in which consumers are actively engaged in their energy consumption



Community Decision Making

How engaged are consumers in the political landscape around matters relating to energy?

Conservation

How engaged are consumers in energy conservation?

Prosumer Energy Management

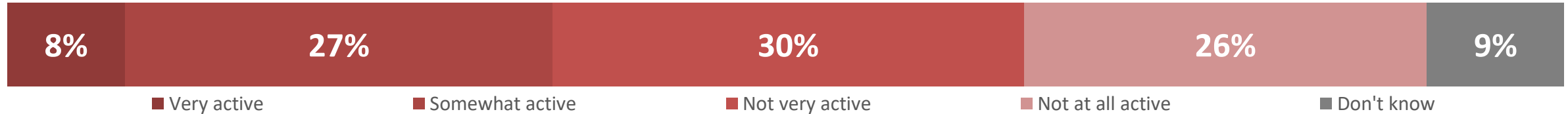
How engaged are consumers in taking their energy consumption into their own hands?

How likely are people to get involved?

Community Decision-Making

How actively involved do you like to be in community decision-making about our energy system?

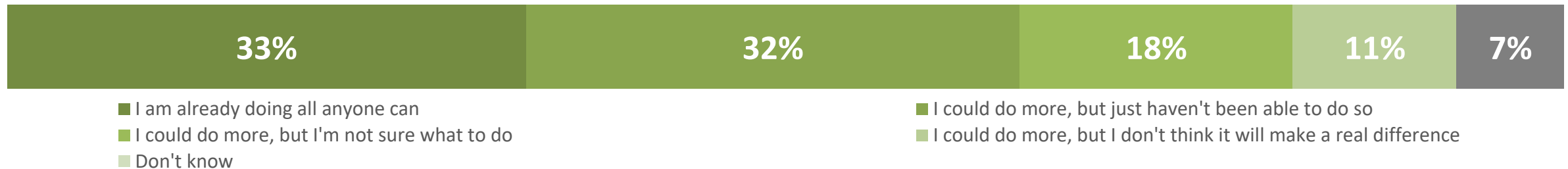
[asked of all respondents; n=800]



Conservation

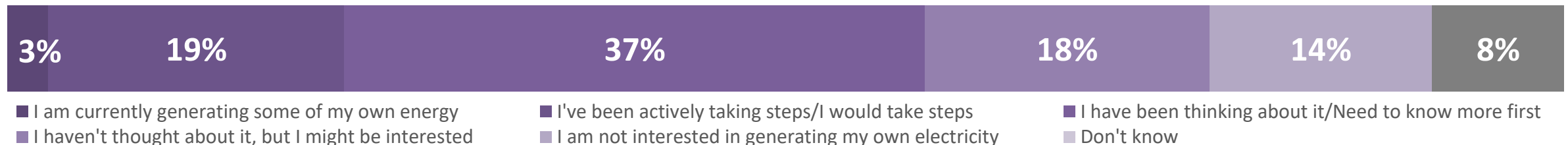
When it comes to electricity conservation, which of the following statements best represents your point of view?

[asked of all respondents; n=800]

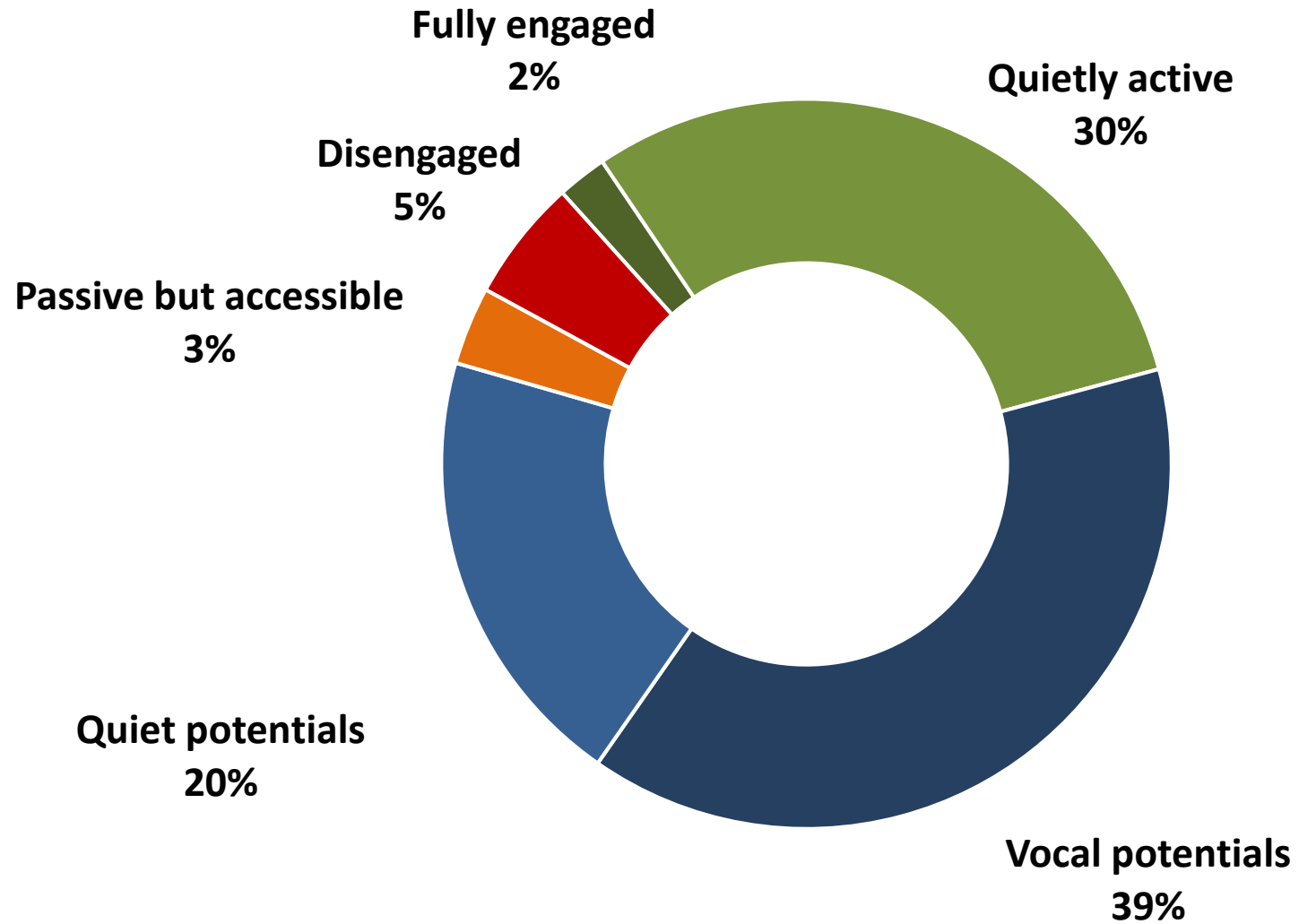


Prosumer Energy Management

How would you describe your interest in generating energy yourself/If, in the future, your housing situation would allow you to do it, how interested would you be in generating energy yourself? [asked of all respondents; n=800]



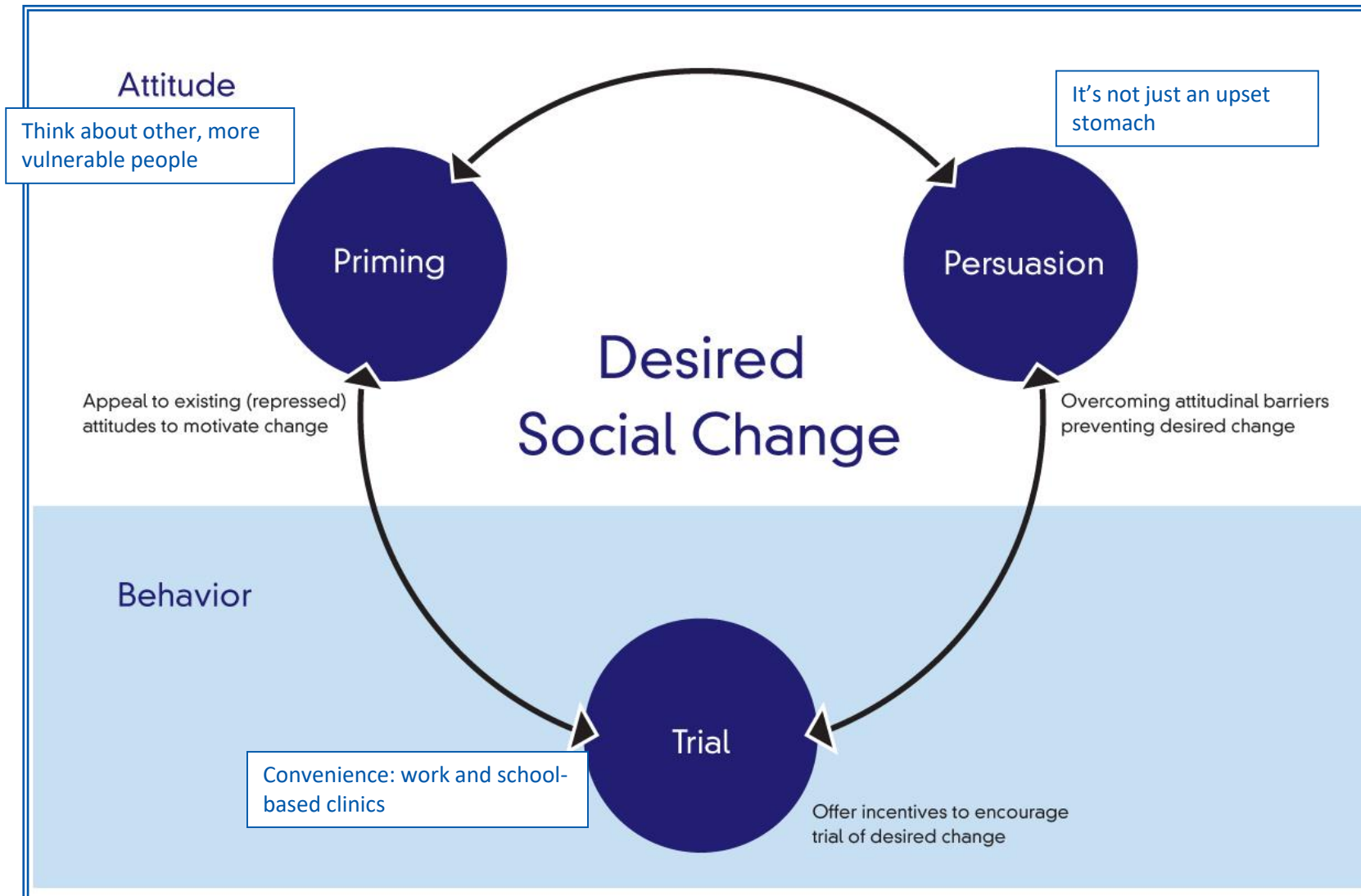
Energy Engagement Segmentation



Changing Behavior

Social Marketing Communication Approaches

Example: Ontario Flu Campaign – *changing social behaviour*



Think, Feel, Do

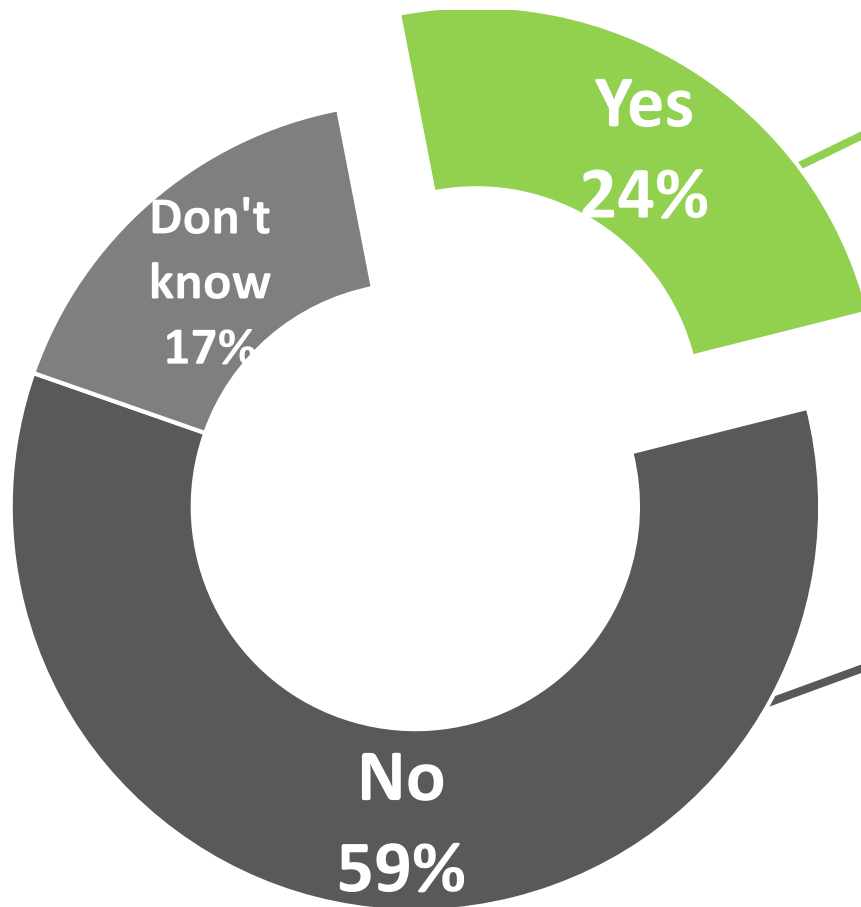
	Know	Feel	Do
Citizenship	There are opportunities for people like me to have input into electricity system decisions.	My input can make a difference.	If I am unhappy with my electricity bill, I will just vote to replace the government.
Conservation	There are tools, strategies and equipment available that will let me conserve more electricity than I do today.	It is easy to conserve more electricity.	How likely is it you will purchase a programmable thermometer before the new year.
Prosumer	There are technologies available now that will let me generate or store electricity in my own home.	I can save money by storing or generating my own electricity.	How likely would you be to install a home solar power system if it resulted in a 10% decrease in your home energy costs?

Self-Generation: On the launch pad?



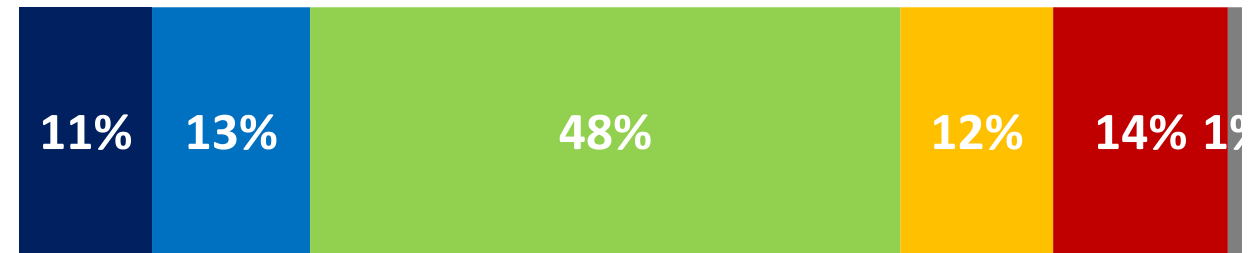
Does your current housing situation allow you to invest in technology to self-generate electricity?

[asked of all respondents; n=800]

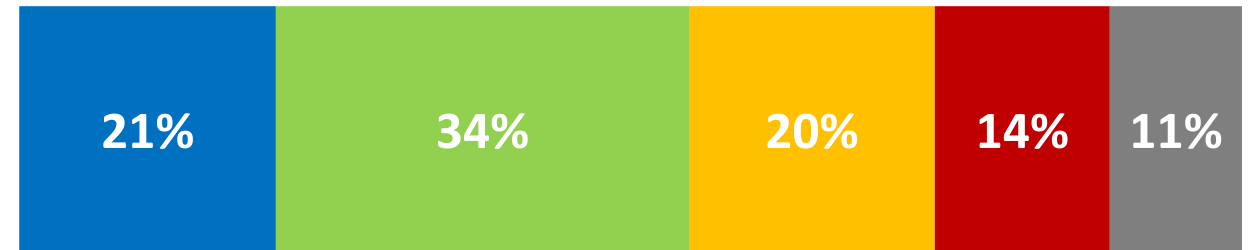


How would you describe your interest in generating energy yourself?

[Yes; n=193]



[No/DK; n=607]



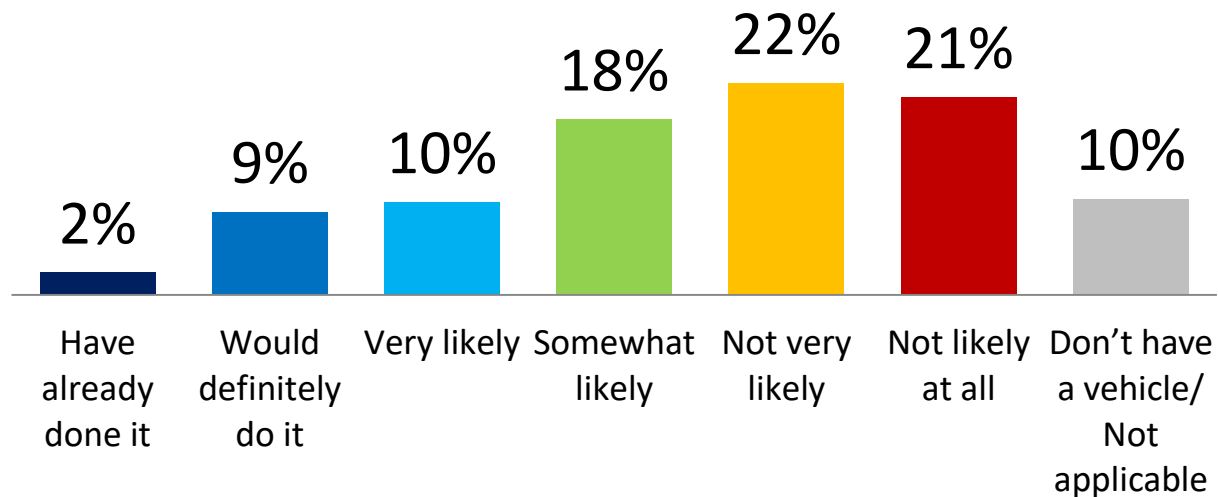
- I am currently generating some of my own energy
- I've been actively taking steps/I would be very interested to become an energy producer
- I have been thinking about it/I would be very interested, but I need to know a bit more first
- I haven't thought about it, but I might be interested
- I am not interested in generating my own electricity
- Don't know

Adoption of Electric Cars: While they are making in-roads, there is no sense of urgency to buy an electric car; cost is the biggest barrier

Q

How likely would you say you are to buy an electric car when it's time to replace your current one?

[asked of all respondents; n=800]

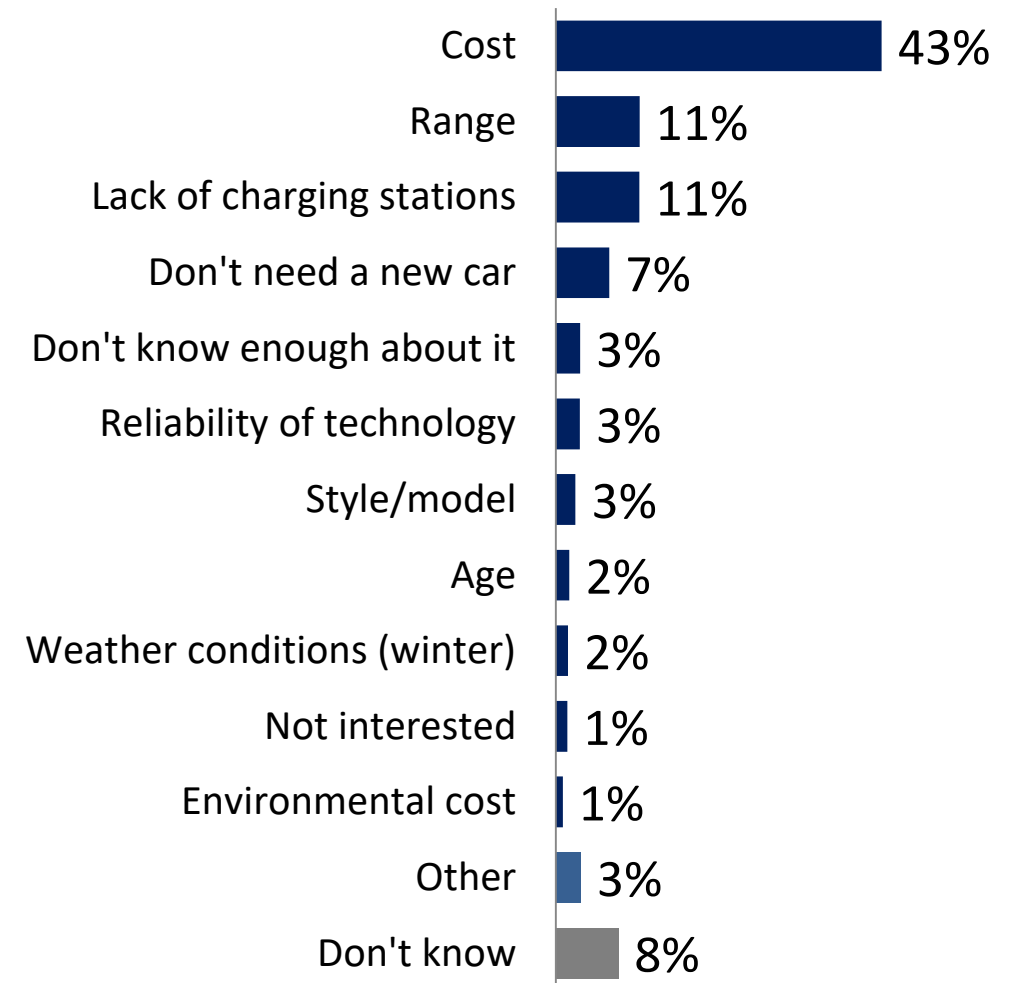


NOTE: "Don't know" (8%) not shown

Q

What, if anything, is holding you back?

[asked of those who haven't already bought an electric car but think it is applicable to them; n=483]

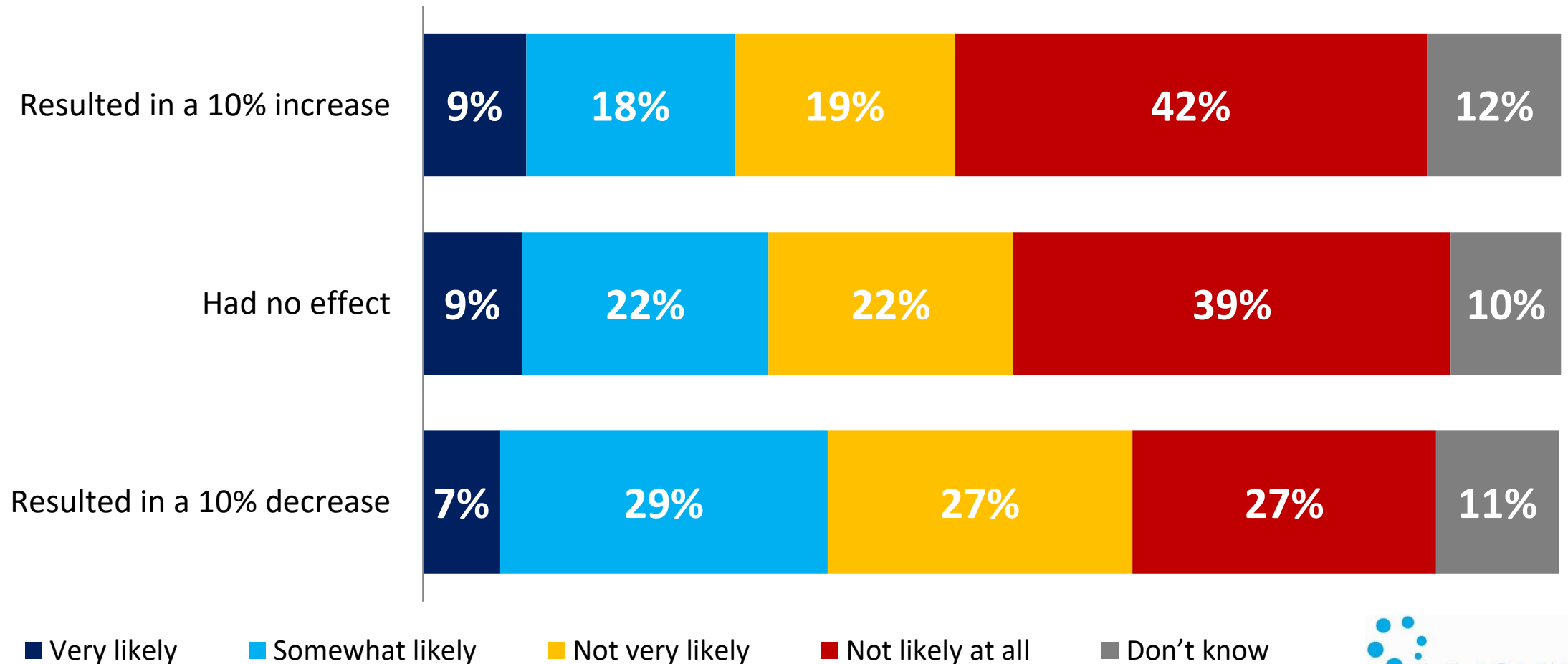


Note: Question not asked in 2019. Showing June 2018 results. "None" (1%) and "Refused" (1%) not shown.

Bill Impact is Not the Only Driver



And how likely would you be to install a solar power system if it _____ on your monthly electricity bill?
[asked of all respondents; n=600 [sample split 3 ways]]



Key Takeaways

1. Consumers are just not that into you. Make it about them.

2. Few consumers are fully engaged as citizens, consumers and conservers but most are engaged to some degree.

3. Costs and savings are key drivers, but not the only drivers of action.



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