

Effectively Reaching and Serving Low-Income Customers

Delivering Value to Customers Who Have
Limited Resources

Jessica Bailis

Analyst, Marketing and Communications,
E Source

E Source Summit for the Tennessee Valley



E Source

Agenda

20 minutes:

- Understanding and empathizing with your customers
- Creating effective messaging, channels, and marketing tactics
- Building trust
- Addressing fears and skepticism

20 minutes: Watch customer testimonials videos and discuss

Understanding and empathizing with customers

Put yourself in their shoes

Table 3: Low income insights summaries

Insight theme	Description	Opportunity implication
Strong mistrust of energy utilities	Low-income consumers tended to have the worst relationships with energy utilities. They want more compassion, leniency, and support from their utilities, but certainly aren't feeling the love today.	How might we build greater trust, rapport, and humanize energy for low-income consumers?
Feeling helpless to improve energy habits	Low-income consumers don't feel in control of their home's efficiency. Their living spaces tend to be older, poorly insulated, and with outdated technology, and since they don't own, they're also hesitant to invest money to improve the situation.	How might we help low income consumers feel more in control over their energy habits and costs?
Energy bill delivers stress not clarity	With limited funds to go around, low-income consumers want to be as prepared as possible for monthly expenses. Sadly the energy bill is often the hardest expense to plan for and the hardest to understand.	How might we rethink how we present bills to low-income customers to meet them where they are?

© E Source

[E Design 2020 Residential Ethnographic Market Research: Summary Report](#)

Empathize with and empower them

- **Empathize:** Listen to their concerns; many people have a strong mistrust of their utility and feel helpless to improve their energy habits.
- **Ensure accuracy:** If someone's bill is high, what's the exact cause? Weather? A new appliance?
- **Empower:** If customers understand why their bill is high, they feel more empowered to reduce it; simplify their bill for them.
- **Offer solutions:** Communicate your solutions in a way that people understand, keeping their experiences and perception of terms in mind.

Effective marketing approaches

SDG&E



"I would highly recommend these assistance programs to anybody."

Bryon

connected to savings

If you're on a limited income, you may be eligible to receive a discount of at least 35% off your monthly energy bill. You could also qualify for free home improvements that can help reduce your energy costs.

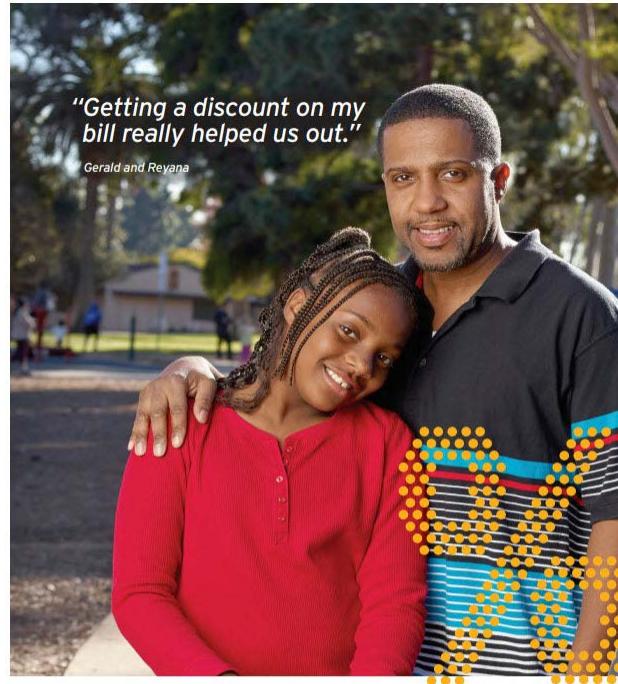
Bryon saved on his bill and you can too. To see if you qualify, **call 1-877-646-5525 or visit sdge.com/care.**

*These programs are funded by California utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission.

©2015 San Diego Gas & Electric Company. Trademarks are the property of their respective owners. All rights reserved.



Source: SDG&E



"Getting a discount on my bill really helped us out."

Gerald and Reyana

connected to what matters

If you're on a limited income, you may be eligible to receive a discount of at least 35% off your monthly energy bill. You could also qualify for free home improvements that can help reduce your energy costs.

Gerald saved on his bill and you can too. To see if you qualify, **call 1-877-646-5525 or visit sdge.com/care.**

*These programs are funded by California utility customers and administered by San Diego Gas & Electric® under the auspices of the California Public Utilities Commission.



Source: SDG&E

SDG&E testimonial: Bryon



Building trust

How to build trust

- **Partnerships** - local community organizations
- **Community outreach** - events and neighborhood sweeps; having community energy champions.
- **Door-to-door** - in person education

Address fears and skepticism

Union Gas

**WE PAY.
YOU SAVE.**

THAT'S THE HOME WEATHERIZATION PROGRAM
FROM UNION GAS.



A Spectra Energy Company

Source: Union Gas

Union Gas direct mail

IF YOUR HOME IS WASTING ENERGY, WE'D LIKE TO FIX IT. AND PICK UP THE BILL.

Is your house cold and drafty in winter? Hard to keep cool in the summer? Are energy costs taking a big chunk out of the household budget? Homes that aren't well insulated place an unfair burden on the person who pays the bills. We can make your home more comfortable and reduce those energy bills by up to 30 per cent. And we can pay for it too.

HOME IMPROVEMENTS THAT SAVE YOU MONEY WITHOUT COSTING YOU ANY.

In support of Ontario's energy conservation efforts, Union Gas is working with partners throughout the province to reduce residential energy use and lower costs. Through our Home Weatherization Program, we're helping income-eligible households install energy-saving upgrades, free of charge.

THE HOME WEATHERIZATION PROGRAM COVERS THE COSTS OF:

- A Home Energy Assessment by a Certified Energy Auditor
- Insulation as needed, in your basement, walls and attic
- Water-saving products to lower your hot-water costs
- A programmable thermostat that adjusts the temperature when you're asleep or away

Ethnographic research customer videos

How would you serve these customers?

- Watch a video from a low-income customer.
- Think of a utility program or service you offer that could benefit this customer.
- Discuss communications or marketing messaging ideas that would help that customer and encourage them to participate in your low-income program.

Video #1



Discussion

- What programs or services would you offer her?
- What type of messaging would you use to encourage her to participate in those programs or services?

Video #2



Discussion

- What programs or services would you offer him?
- What type of messaging would you use to encourage him to participate in those programs or services?

Video #3



Discussion

- What programs or services would you offer her?
- What type of messaging would you use to encourage her to participate in those programs or services?

Key takeaways

- Empathize with and empower your low-income customers by listening, getting down to the real problem, explaining usage and how to manage it, and offering solutions in a compassionate tone.
- Build trust with low-income customers through partnerships, community outreach, and door-to-door efforts.
- Address fears and skepticism by helping low-income customers understand why and how a program is free.

Thank you! Questions?



Jessica Bailis

Analyst, Marketing and Communications, E Source

303-345-9159 jessica_bailis@esource.com

Have a question? Ask E Source!

Submit an inquiry: www.esource.com/question

You're free to share this document in its entirety inside your company. If you'd like to quote or use our material outside of your business, please contact us at customer_service@esource.com or 1-800-ESOURCE (1-800-376-8723).