

Proposed Consumer Survey in India

Proposal by Grey Worldwide
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The Brand BEE has to appropriate
real benefit values for the
consumers

Our journey so far

#1

- We have created the energy efficiency stars. Durable companies have started to use
- The consumers now have an anchor for choosing the more energy efficient appliance

#2.

- We have created a mass media campaign that is sensitizing the consumers towards responsive energy consumption

#3.

- The campaign has been extended to include buildings and institutions. This has been received well by the market

What do we need to do now?

- Strengthen our relationship with the consumers
- Take the entire energy efficiency attitude beyond just appliances for the consumers. Make it a way of life
- Make the buildings and institutional market seek us out

How do we do it?

#1. Create a rallying cry

Consumers must own the cause and
make it a part of their lives

#2. Make efficient use of energy a way of life

Not an occasion driven attitude, but
an every day part of life

#3. Drive it deeper

Involve the whole country

If the Pulse Polio campaign can
do it, so can we

What do we need to do to
further our journey?

#1: Understanding the operating ground

- Our focus is on demand side management. The large institutional consumers are aware and are proactively making their consumption efficient
- What we need to do is understand the consumer attitude deeper

Who are the stake holders?

- Priority 1 consumers
 - Domestic consumers
 - Large buildings
 - Municipal corporations and utility providers
 - Small scale industries
 - Estate management companies
- Priority 2 consumers
 - Large builders
 - Architects/town planners/
 - Policy makers, opinion leaders
 - Media and journalists

What do we need to find?

- What are the current attitude to energy efficiency
- What will make our consumers proactively seek us out
- What are the barriers to adoption of efficient means
- What will motivate the market to adopt
- What are the various audience groups seeking from the brand BEE
- How can the brand BEE become a part of their lives
- How open are they towards spending more money to buy efficient appliances?
- Why will they seek efficient solutions, in which areas, and how do they intend to adopt them

How will this be done?

- Analyzing the existing researches and arriving at the base knowledge base
- Mounting primary research among both the priority consumers to understand them deeper
 - This will involve both qualitative and quantitative methods

Role of research

- Key objective of this research is to help assess consumer attitude with respect to energy efficiency in depth

Scope of research

- To get an in-depth understanding of consumer w.r.t energy efficiency, the dimensions below will be covered
 1. Attitude w.r.t to energy efficiency
 2. Knowledge of energy efficiency means
 3. Attitude towards adoptions of energy efficiency means
 4. Actual adoption of energy efficiency means
 5. Readiness to get audits done for energy consumption
 6. Awareness & perceptions of BEE
- Details of information areas with each of these are listed herewith:

Attitude w.r.t energy efficiency

- This section will aim to get answers to these questions
 - Does the consumer realize the need for energy efficiency - How many do / do not and why / why not?
 - Does the consumer feel that as individuals/ corporations / industries etc we can make any significant contribution towards energy efficiency - why / why not?
 - Does the consumer feel that as individuals/ corporations / industries etc, it is our responsibility to contribute towards saving energy - why / why not?
 - Does the consumer believe that as an individuals/ corporations / industries etc, he / she is contributing their lot towards energy savings
 - This will be assessed in all segments

Knowledge of energy efficiency means

- This section will aim to get answers to these questions
 - Spontaneously, without any aiding, what are the things which they can do as individuals to save energy
 - They will be exposed a list given and asked which of these do they know of as energy saving means
 - As an example, the list for domestic users is given below
 - Turn out lights in rooms you do not use
 - Use energy saving bulbs / tube lights
 - Switch off equipment rather than keeping on stand by
 - Switching off AC / geysers when not required
 - Take a shower instead of bath
 - Take public transport instead of own transport
 - Buy star rated durables
 - There will be similar lists for other segments
 - This will be assessed in all segments

Attitude towards adoption of energy efficiency means

- This section will aim to get answers to these questions
 - What is their disposition towards adopting each of these
 - Which of these in the list do they do these – never, sometimes, often, always
 - As an example, the list for domestic users is given below
 - Turn out lights in rooms you do not use
 - Use energy saving bulbs / tube lights
 - Switch off equipment rather than keeping on stand by
 - Switching off AC / geysers when not required
 - Take a shower instead of bath
 - Take public transport instead of own transport
 - Buy star rated durables
 - There will be similar lists for other segments
 - This will be assessed in all segments

Actual adoption of energy efficiency means → Household audit

- This section will aim to get answers to these questions
 - What is the actual adoption of energy efficiency means
 - This will involve household audit to actually check the following
 - Lights / fans are off in rooms not being used
 - There are energy saving bulbs / tube lights
 - Switch off equipment rather than on stand by
 - Switching off AC / geysers when not required
 - There are star rated durables in the household
 - In case there are any vehicles in the household, information will be collected on modes of transport taken on various purposes, fuel used in the vehicle and total fuel expenses in a month
 - Etc ...
 - This will be done only in domestic users segment

Awareness & perceptions of BEE

- This section will aim to get answers to these questions
 - What is the salience of BEE
 - What is the salience of star rating program – what is the comprehension of star labeling program
 - What is the salience of recent BEE advertising
 - What is comprehension & appeal of recent BEE advertising
 - What is the perception of BEE amongst the target audience
 - This will be assessed in all segments

Research Design

Research design & methodology

- Module 1 – Exploratory (to help understand nuances of energy efficiency w.r.t to each segment). This will be done as interviews with energy experts / consultants etc to help freeze on information required from each segment and to develop instruments
- Module 2 – this will be the main module. This will be done as a mix of qualitative and quantitative methodologies. Details of methodology and sample size for each segment are detailed herewith

Target segments

- Energy experts / consultants
- Domestic consumers – representing all town classes, SEC segments, genders, zonal geography
- Large buildings: Building facility managers
- Municipal corporations
- Utility providers (electricity corporations / water corporations)
- Small scale industries
- Estate management companies
- Large builders
- Architects/town planners
- Media / journalists

Sampling methodology

- Domestic consumers – random sampling to represent all segments
 - For this, in the sampling design, centres will be selected such that all towns and town classes are represented
 - Around each centre, sample size will be split across urban and rural
 - Random sampling methodology will be used for household selection
 - Within each selected household, kish grid will be used for selecting an adult member in the household
- For all other segments, purposive sampling will be used

Sample sizes

	Methodology	Sample size
Energy experts / consultants	DI	5
Domestic consumers	SI	3000
Municipal corporations	DI	10
Utility Providers	DI	10
Small scale industries	SSI	30
Estate management companies	SSI	30
Large builders	SSI	20
Architects	SSI	20
Policy makers	DI	10
Media / journalists	DI	10

SI – Structure Interview

SSI – Semi Structured Interview

DI – Depth Interview

What will this research help us achieve

- Together with the earlier research this will help us in arriving at the consumer context in great depth
- This consumer understanding will be distilled down to arrive at issues and possible approaches to solve the issues

Overall

- We need to create the branding roadmap
- This will need the following
 1. Identifying the key audiences
 2. Understanding their barriers and motivators
 3. Learning from how others have done
 4. Creating possible appeals
 5. Pretest the appeals and assess their impact
 6. Create the branding artworks
 7. Plan the roll out, it will have to be multipronged where the industry needs to be roped in to be our partners
 8. Track and course correct

Thank you