Noel Williams, Head of Energy Saving Trust
Northern Ireland

Energy Saving Trust Consumer Segmentation

Why segmentation?

- Segmentation = grouping people with similar characteristics
- Enables you to determine best:
  - people to target
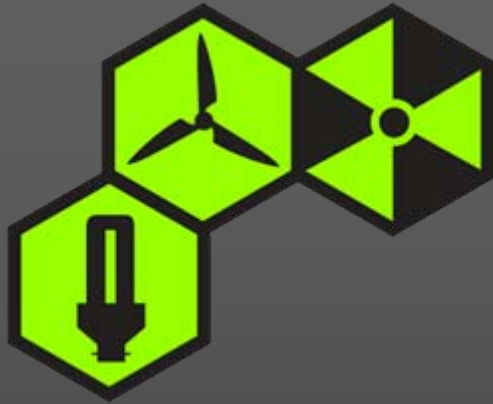 - messages to promote
  - communication channels to use

Mosaic and the Energy Saving Trust Segmentation Model

One of biggest consumer segmentation models

- **61** types based on age, gender, education, income
- EST grouped types into **10** segments based on:

  - home CO2 emissions
  - vehicle CO2 emissions
  - attitude to environment

Constructing the Model

- Model used to identify:
  - People most interested in protecting the environment AND
  - Largest capacity for saving carbon

The 10 Segments

1 Environmentally Mature
High consumers of home and vehicle energy.

2 Educated Advocates
Critical in next few yrs as lifestyle develops to larger homes and more cars

3 Discerning Elders
Energy bills still quite high. Moderate vehicle ownership

4 Comfortable Conservatives
Home and vehicle emissions above average – scope for reducing emissions

5 Little Britain
Home and vehicle emissions not high. Below average attitude towards environment

6 Restful Retirement
Those that are independent will want to save money: potentially interested in saving energy

7 Driving Dependency
Relatively new houses with lowest CO2 emission score

8 Financially Burdened
New large housing. Family demands make energy consumption relatively high

9 Ethnic Tradition
High proportion of extended families resulting in high energy consumption

10 Fixed Horizons
CO2 emissions just below average. Vehicle ownership low

eaga · firmus energy taking natural gas further · Kingspan Kingspan Insulation Ltd · Northern Ireland Electricity · PHOENIX NATURAL GAS · Action Renewables the future of energy, today

National Home Energy Conference 2007
Fuelling the debate – energy efficiency / renewables / nuclear power

HECA

1. Environmentally mature

- Affluent couples
- Large homes
- Well educated
- High consumers of home and vehicle energy

2. Educated Advocates

- Young couple and professionals
- Well educated
- Critical in next few years as lifestyle develops to larger homes and more cars

eaga
firmus energy — taking natural gas further
Kingspan — Kingspan Insulation Ltd
NIE — Northern Ireland Electricity
PHOENIX NATURAL GAS
Action Renewables — the future of energy, today
HECA

3. Discerning Elders

- On cusp of retirement
- Mortgage paid off
- Energy bills still quite high
- Moderate vehicle ownership

4. Comfortable Conservatives

- Professional couples
- Don't like to be pressured into change
- Home and vehicle emissions above average – scope for reducing emissions

5. Little Britain

- A cross section of modern Britain
- Suburban couples
- Home and vehicle emissions not high
- Below average attitude towards environment

6. Restful Retirement

- Elderly couples and widowers
- Low car ownership
- Those that are independent will want to save money; potentially interested in saving energy

7. Driving Dependency

- Young sharers or couples
- Car is a lifeline
- Relatively new houses with lowest CO_2 emission score

eaga   firmus energy   Kingspan   Northern Ireland Electricity   PHOENIX NATURAL GAS   Action Renewables the future of energy, today

National Home Energy Conference 2007
Fuelling the debate – energy efficiency / renewables / nuclear power

HECA

8. Financially Burdened

- Families with high expenditure on everyday living
- New large housing
- Family demands make energy consumption relatively high

9. Ethnic Tradition

- High importance of family

- High proportion of extended families resulting in high energy consumption

10. Fixed Horizons

- Poorer families and elderly couples
- Live in council or ex council property
- CO_2 emissions just below average
- Vehicle ownership low

Segments 1- 4

- Top 4 segments we believe will return greatest carbon savings
- Higher personal concern and motivation
- More interested in energy saving products and renewable technologies
- More willing and able to save carbon

Segments 7-10

- Less able or willing to make carbon savings
- Lower awareness of Energy Saving Trust
- Fewer energy saving products
- Less concerned about environment

eaga   firmus energy   Kingspan   Northern Ireland Electricity   PHOENIX NATURAL GAS   Action Renewables the future of energy, today

National Home Energy Conference 2007
Fuelling the debate – energy efficiency / renewables / nuclear power

HECA

Applying the Model
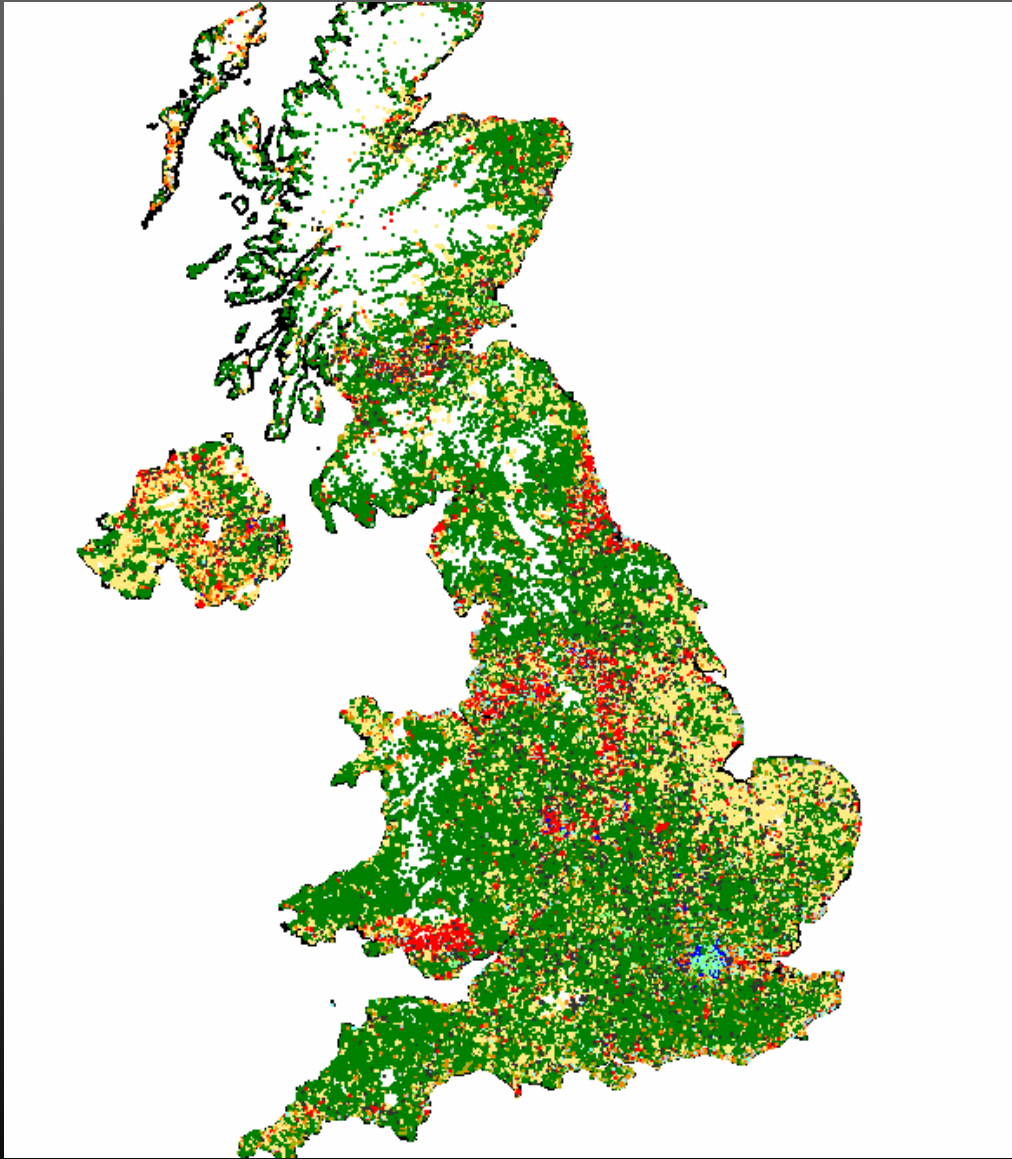
Avoiding 'spray and pray'

- Improves return on investment by targeting the best:
  - homes to mailshot
  - areas to hold events
  - partners to work with
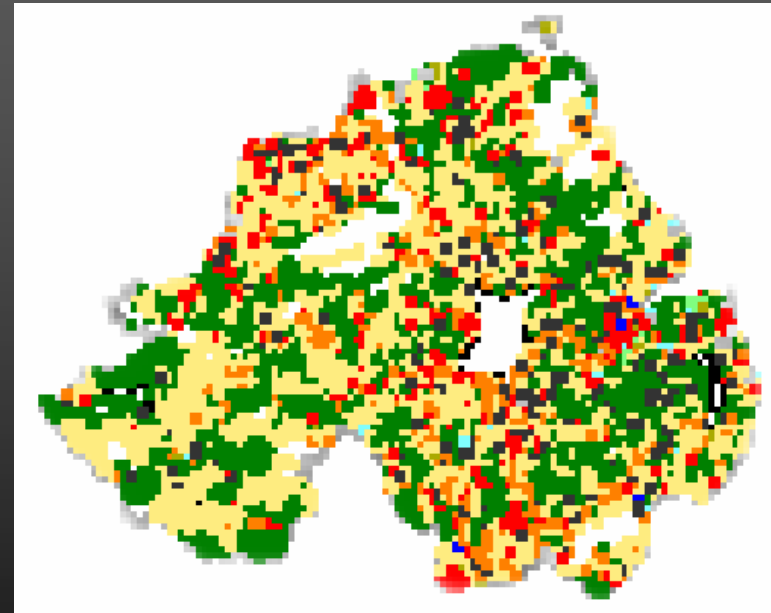 - media for advertising and PR

Segment spread

- 01 Environmentally Mature
- 02 Educated Advocates
- 03 Discerning Elders
- 04 Comfortable Conservatives
- 05 Little Britain
- 06 Restful Retirement
- 07 Driving Dependency
- 08 Financially Burdened
- 09 Ethnic Tradition
- 10 Fixed Horizons

eaga • firmus energy taking natural gas further • Kingspan Kingspan Insulation Ltd • Northern Ireland Electricity • PHOENIX NATURAL GAS • Action Renewables the future of energy, today

National Home Energy Conference 2007
Fuelling the debate – energy efficiency / renewables / nuclear power

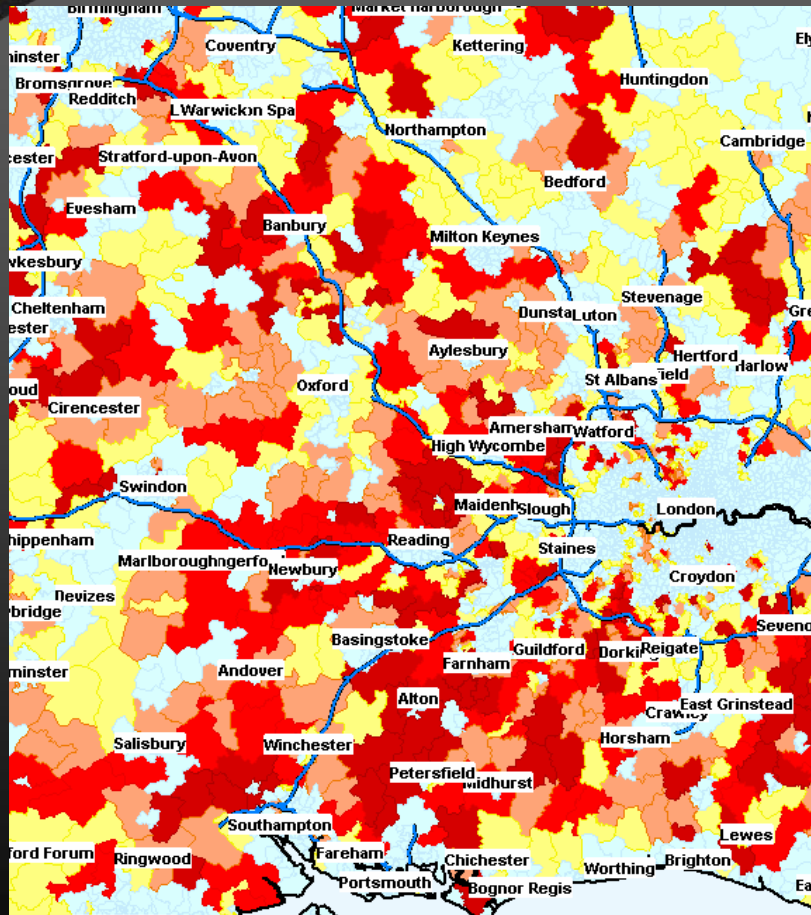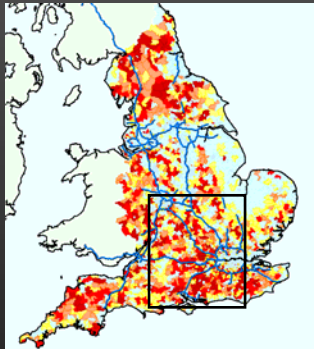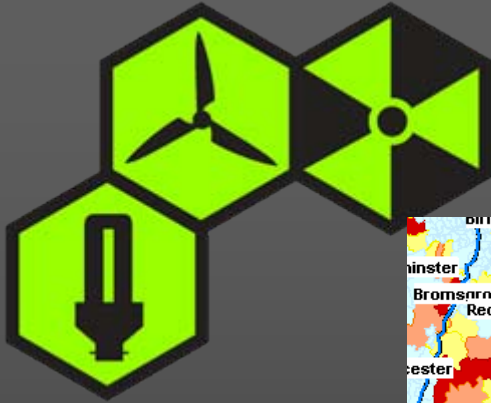HECA

Snapshot of Northern Ireland

Legend:

- 01 Environmentally Mature
- 02 Educated Advocates
- 03 Discerning Elders
- 04 Comfortable Conservatives
- 05 Little Britain
- 06 Restful Retirement
- 07 Driving Dependency
- 08 Financially Burdened
- 09 Ethnic Tradition
- 10 Fixed Horizons

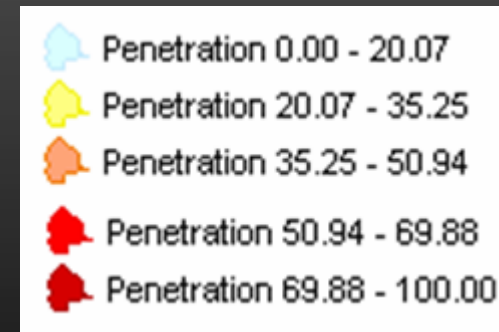## 43% of households in Northern Ireland are Fixed Horizons

eaga   firmus energy — taking natural gas further   Kingspan — Kingspan Insulation Ltd   Northern Ireland Electricity   PHOENIX NATURAL GAS   Action Renewables — the future of energy, today   HECA

Identifying Hotspots

Hotspots of Seg 1 Environmentally Mature households in England (penetration %)

Penetration 0.00 - 20.07
Penetration 20.07 - 35.25
Penetration 35.25 - 50.94
Penetration 50.94 - 69.88
Penetration 69.88 - 100.00

Example Activities

- Nationally:
  - Advertising in media consumed by segments
  - Direct mail campaign
  - Segment research informing most motivating messages
- Advice Centres using:
  - With HEED to target homes on specific measures e.g. CWI, renewables
  - Reaping greater carbon savings

Opportunities for HECA Network

- Energy Saving Trust advice centres have access to segmentation data
- Contact local centre to discuss opportunities
- Share your findings!

eaga · firmus energy · Kingspan Insulation Ltd · Northern Ireland Electricity · PHOENIX NATURAL GAS · Action Renewables the future of energy, today

National Home Energy Conference 2007
Fuelling the debate – energy efficiency / renewables / nuclear power

HECA