



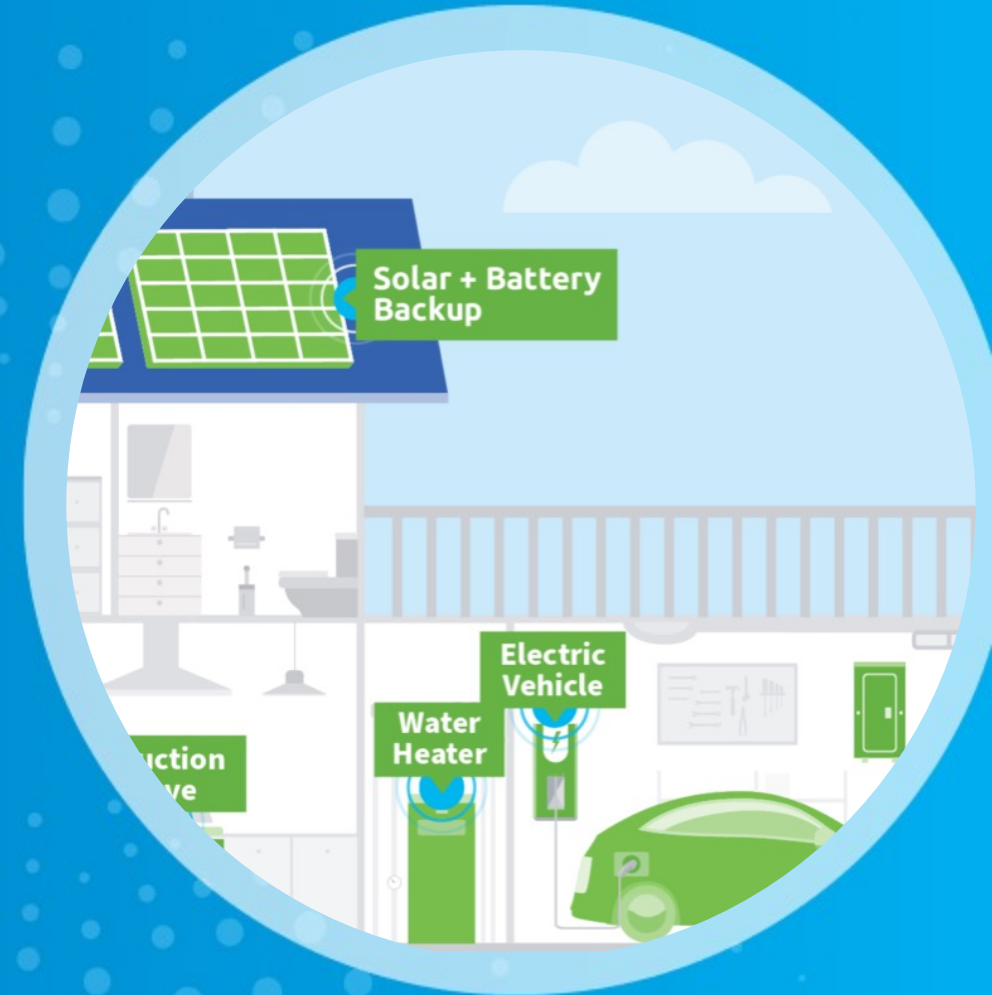
Electrification Messaging Market Research

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Appliance selection factors (examples)

CLIMATE FRIENDLY

- Help me act to protect the environment for future generations
- Have no emissions that contribute to climate change

ALL ELECTRIC/NO METHANE

- Do not use natural gas (also known as methane gas) to operate
- Preserve or move my home toward being an all-electric home

COSTS LESS

- Cost less to run for a typical year
- Use a lower cost power source

HEALTH/SAFETY

- Are safer/ no risk of explosions or leaks
- Do not risk the release of unsafe emissions into my home
- Are healthier / protects my home's indoor air quality

PRIDE/UNIQUE

- I would enjoy showing to my guests
- I might be among the first to own/is a bit unique

PROTECT AND ADD VALUE

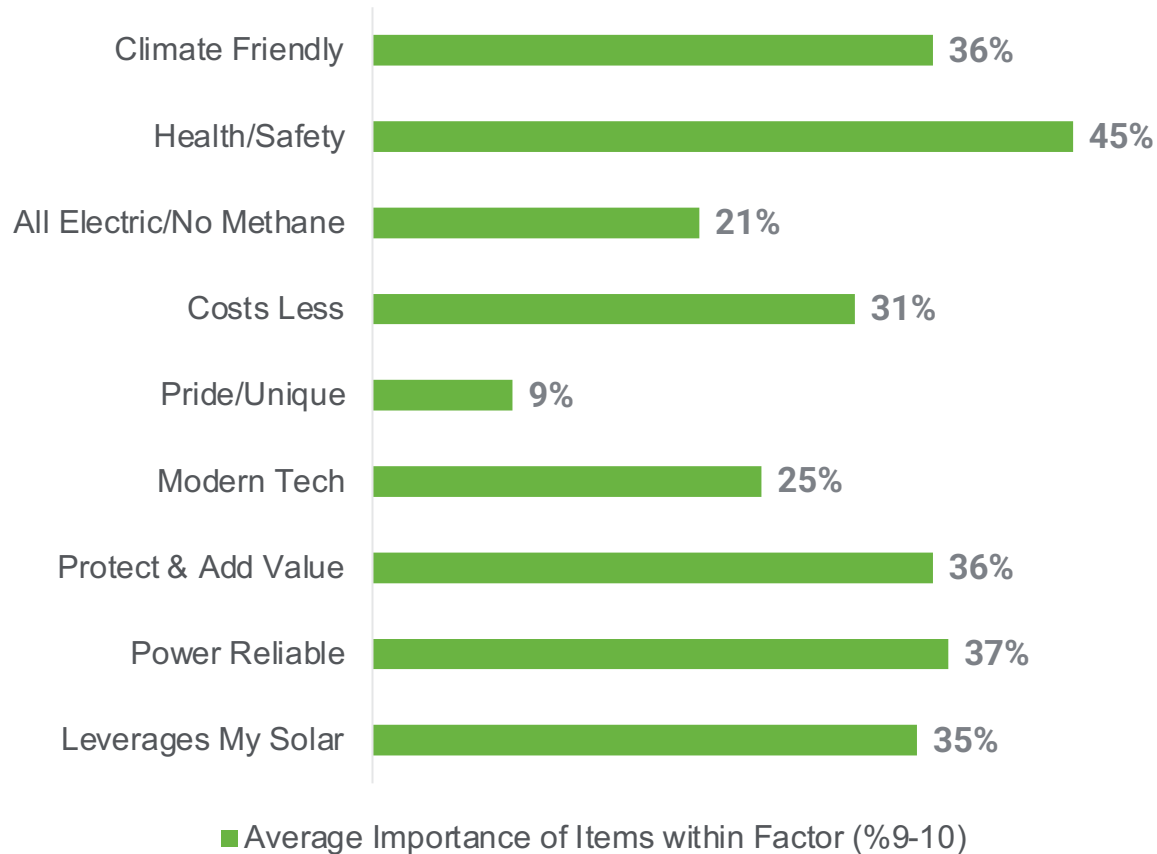
- Protect the value of my home
- Add to the value of my home in the long run

POWER RELIABLE

- Can continue to operate during a power outage

Appliance selection factors – importance

Appliance Selection Factors – Total Sample



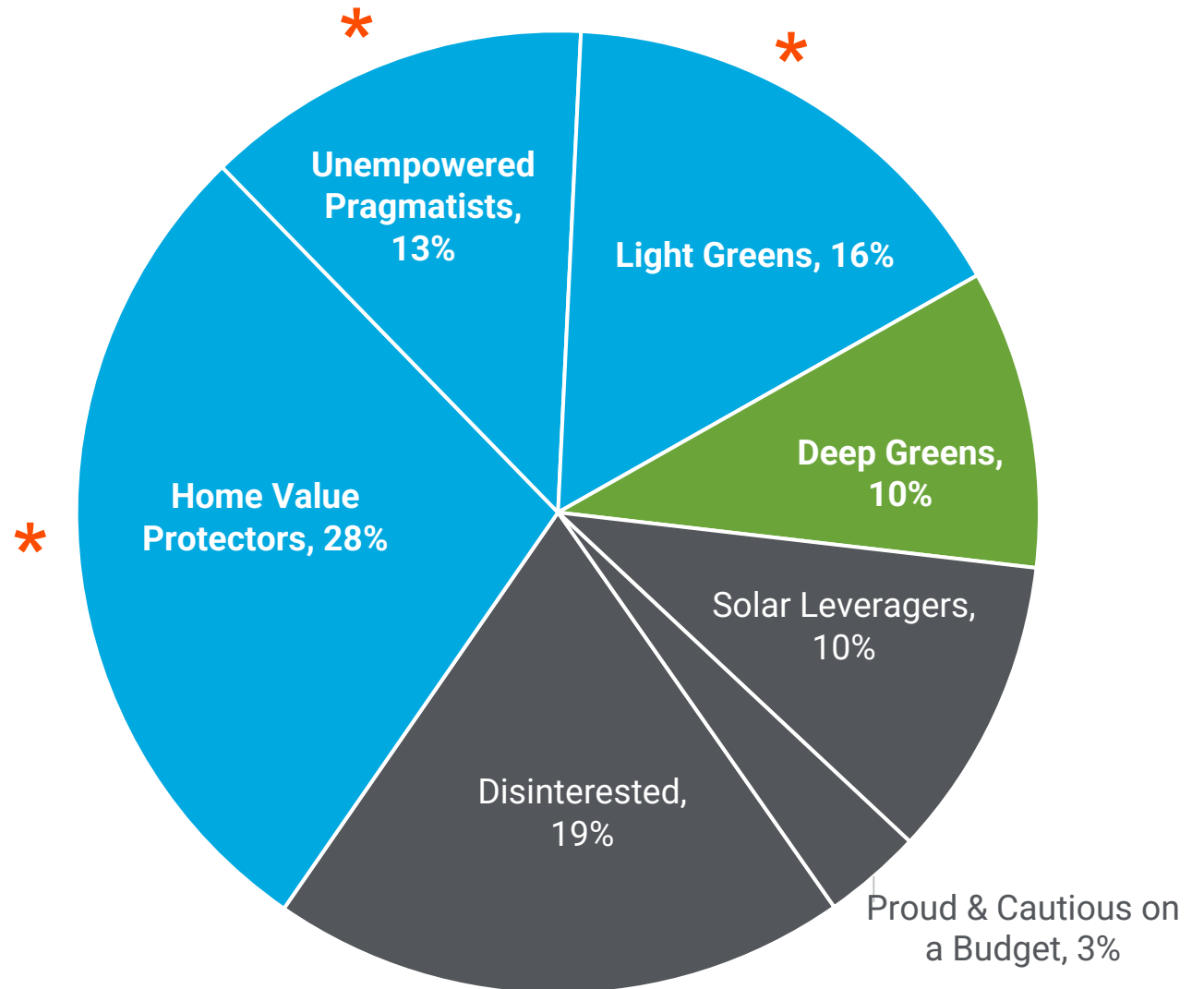
- Depicts importance ratings across total sample
- Different segments have distinctive patterns of importance ratings

Segments

For broad-based messaging, we grouped target segments (*) based on:

- Sufficient commonality of perceived benefits
- Persuadable segments
- Combined size (57% of market)

Share of the Market



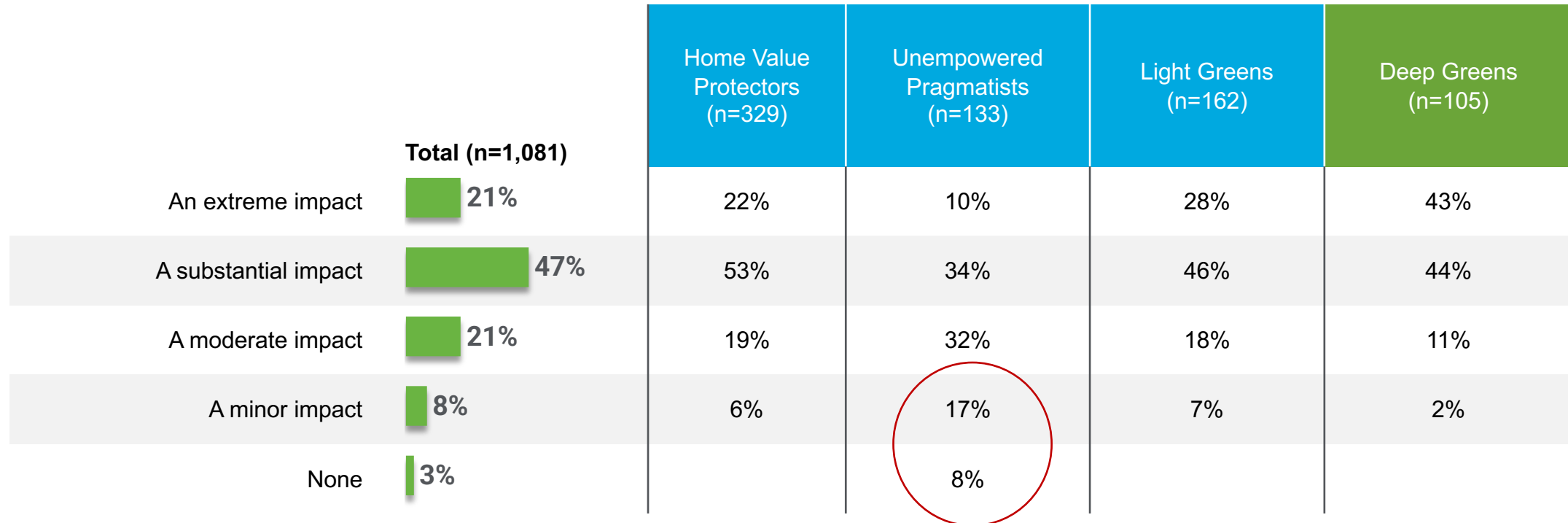
Appliance selection factors ratings, target segments

		Home Value Protectors	Unempowered Pragmatists	Light Greens	Deep Greens
	Share of Market	28%	13%	16%	10%
	Appliance selection factors	-----% rating top 2 on scale of 1-10-----			
Health/Safety	Are safer/ no risk of explosions or leaks	75%	69%	72%	72%
	Do not risk the release of unsafe emissions into my home	71%	62%	70%	82%
	Are healthier / protects my home's indoor air quality	67%	50%	67%	84%
Cost	Cost less to run for a typical year	63%	46%	56%	36%
	Protect the value of my home	60%	39%	48%	37%
	Use a lower cost power source	59%	47%	51%	35%
Protect / Add Value	Add to the value of my home in the long run	56%	28%	36%	31%
Climate	Help me act to protect the environment for future generations	51%	11%	53%	94%
	Have no emissions that contribute to climate change	51%	11%	46%	90%

Q8. If you were in the market for a new appliance for your home, such as those mentioned previously, how important would the following factors be to you?

Environmental attitudes of target segments

Q11 - Based on current trends, how much impact will climate change have on the everyday lifestyle of the next generation of San Mateo County residents?



Environmental attitudes of target segments

Home Value Protectors (n=329)	Unempowered Pragmatists (n=133)	Light Greens (n=162)	Deep Greens (n=105)
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Agree with...

The actions I take in my home can have a meaningful impact on climate change	60%	24%	56%	75%
I am willing to pay up to 10% more to purchase products that mitigate climate	44%	15%	51%	84%
I am willing to replace my vehicle and/or appliances before the end of their useful life to help mitigate my impacts on climate change	42%	10%	32%	67%
I am not willing to pay anything more to purchase products that mitigate climate change	11%	41%	10%	6%

Demographics of target segments

	Home Value Protectors	Unempowered Pragmatists	Light Greens	Deep Greens
Rent	30%	20%	25%	15%
Own	70%	80%	75%	85%
Age	(45.8)	(46.0)	(47.9)	(54.1)
44 or less	32%	39%	25%	21%
45-64	38%	30%	40%	34%
65+	27%	28%	33%	42%
Income				
\$75k or less	14%	12%	16%	10%
\$75k to \$150k	32%	22%	21%	18%
\$150k+	37%	35%	42%	57%
Ethnicity				
White	42%	44%	54%	74%
Asian/Pac Islander	36%	26%	20%	8%
Prefer not to say	8%	18%	12%	4%

Highlight indicates notable difference vs. other segments

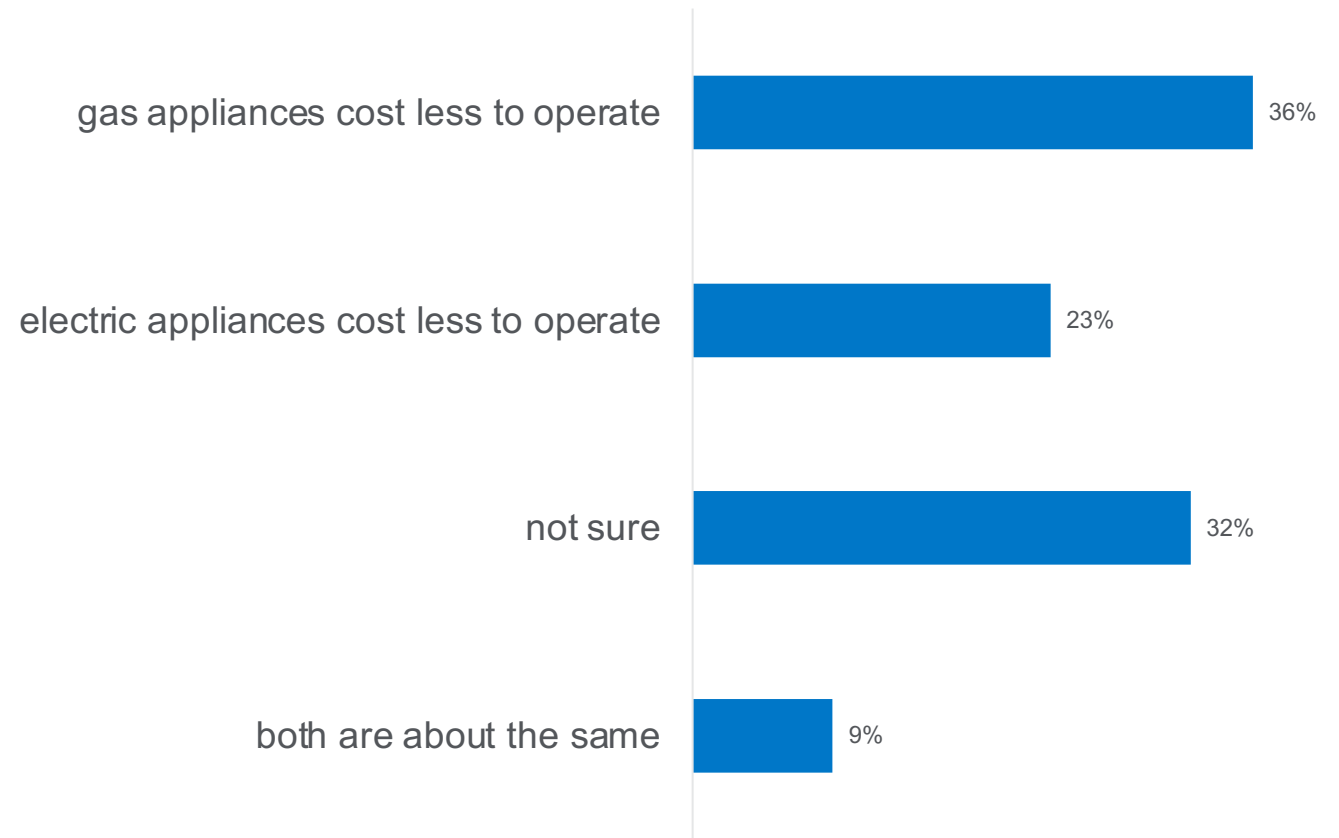
Message development

- Health and safety benefit must be emphasized
- Cost issue must be addressed but a claim of cost savings (existing buildings) is not as straightforward as it is with EVs.
- Climate friendly messaging resonates for our target segments, except for the Unempowered Pragmatists

Challenges for message development

- General energy literacy is likely quite low
- Low awareness of effects of methane gas
- Need to increase favorable perception and consideration of electric appliances
- Perception of gas vs. electricity cost does not favor electricity

Cost to operate gas vs. electric appliance*



* Based on 2020 Awareness/Perception Monitoring study (N=2261)

Next Steps

- Testing response to four different campaign slogans (in 3 languages)
 - A healthy climate starts at home
 - Healthy homes run electric
 - Clear the air. Go electric.
 - Clean living is electric
- Start fast, flexible and low cost
- Collaborate with partners
- Expanded campaign investment