

THE ESOS SUPPLIER SURVEY REPORT

SUMMARY OF FINDINGS



Agenda

- The ESOS Survey Method and Scope
- The Findings of the Survey
 - Markets and Prospects
 - Business Case and the C-Suite
 - Sales Channels
- 3 Key Questions for Suppliers
- ESOS Support Available From Cambium
- Q&A

THE SURVEY METHOD AND SCOPE



Survey Method

Survey Objective:

To complete the first survey of the UK Energy Efficiency Supply chains attitudes to the ESOS market opportunity

Survey Ground Rules:

- Participants: Open to All, ESTA Members approached via ESTA
- **Respondent Confidentiality A Top Priority**
- Shared analysis at an aggregated level

Survey Structure:

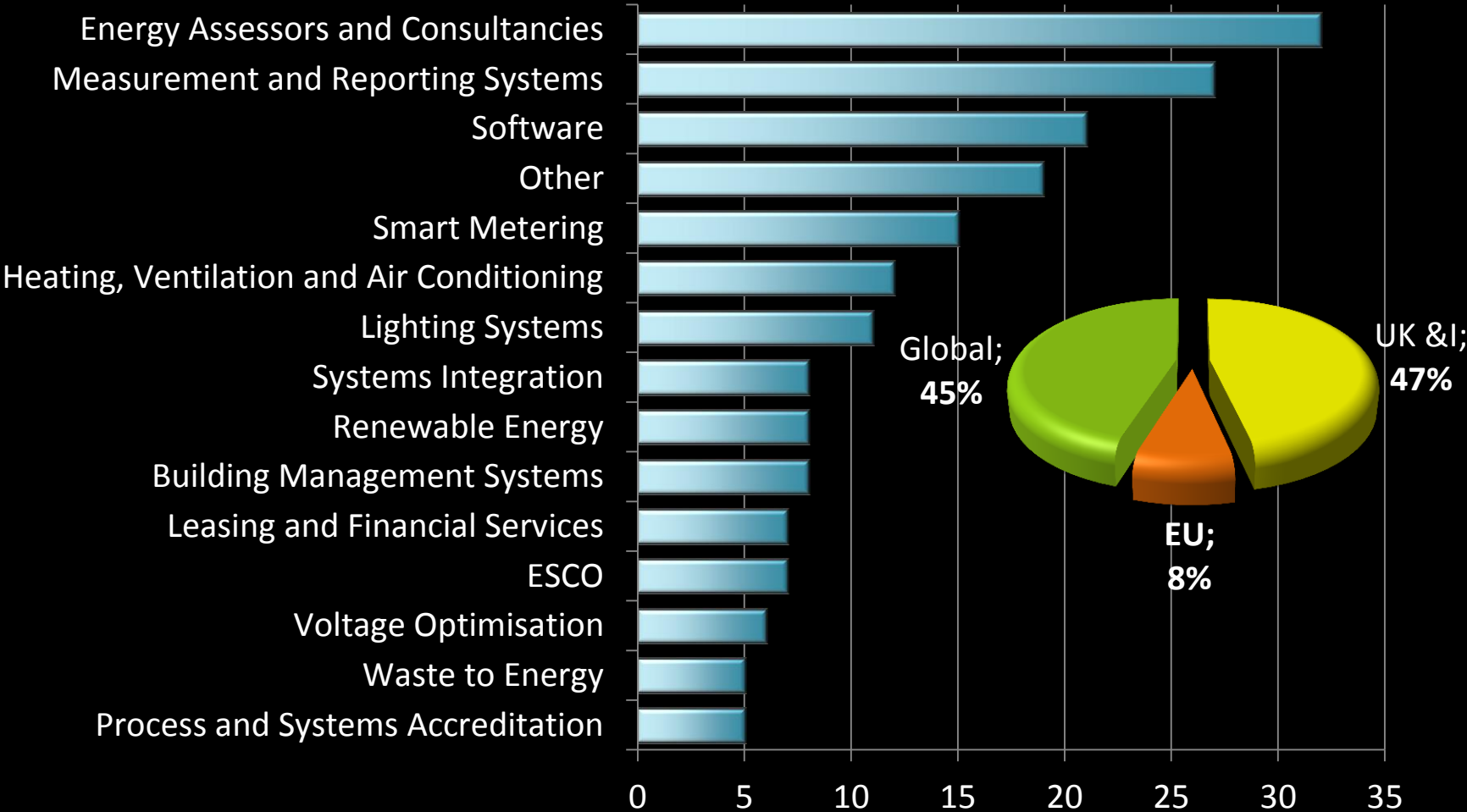
- Survey designed by Cambium, reviewed with ESTA : 30 Questions, 15 mins
- Focus- Attitudes to ESOS Market Opportunity
- Topics: ESOS Dynamics, Policy, Sales & Marketing

Survey Method:

- On-line tool from Cambium website
- 13th October, 2014 to 14th November, 2014



Participants and Mix of Technologies Covered



75 Companies

UK → Global Presence

£250k – Multi-million T/O

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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

Agenda

- ✓ The ESOS Survey Method
- The Findings of the Survey
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 - Business Case and the C-Suite
 - Sales Channels

Key Questions for Suppliers

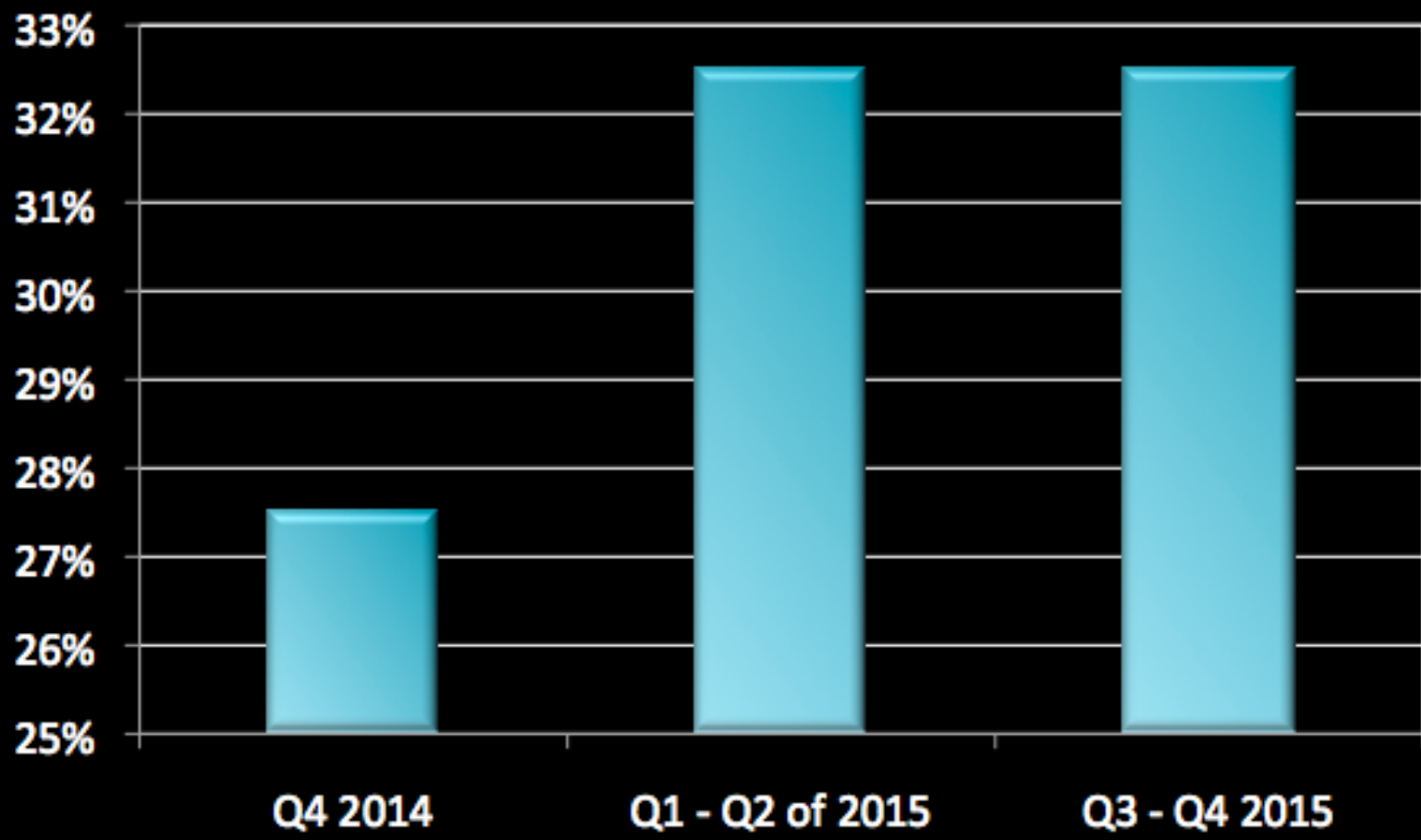
- ESOS Support Available From Cambium
- Q&A

THE ESOS SUPPLIER SURVEY KEY FINDINGS

MARKETS AND PROSPECTS

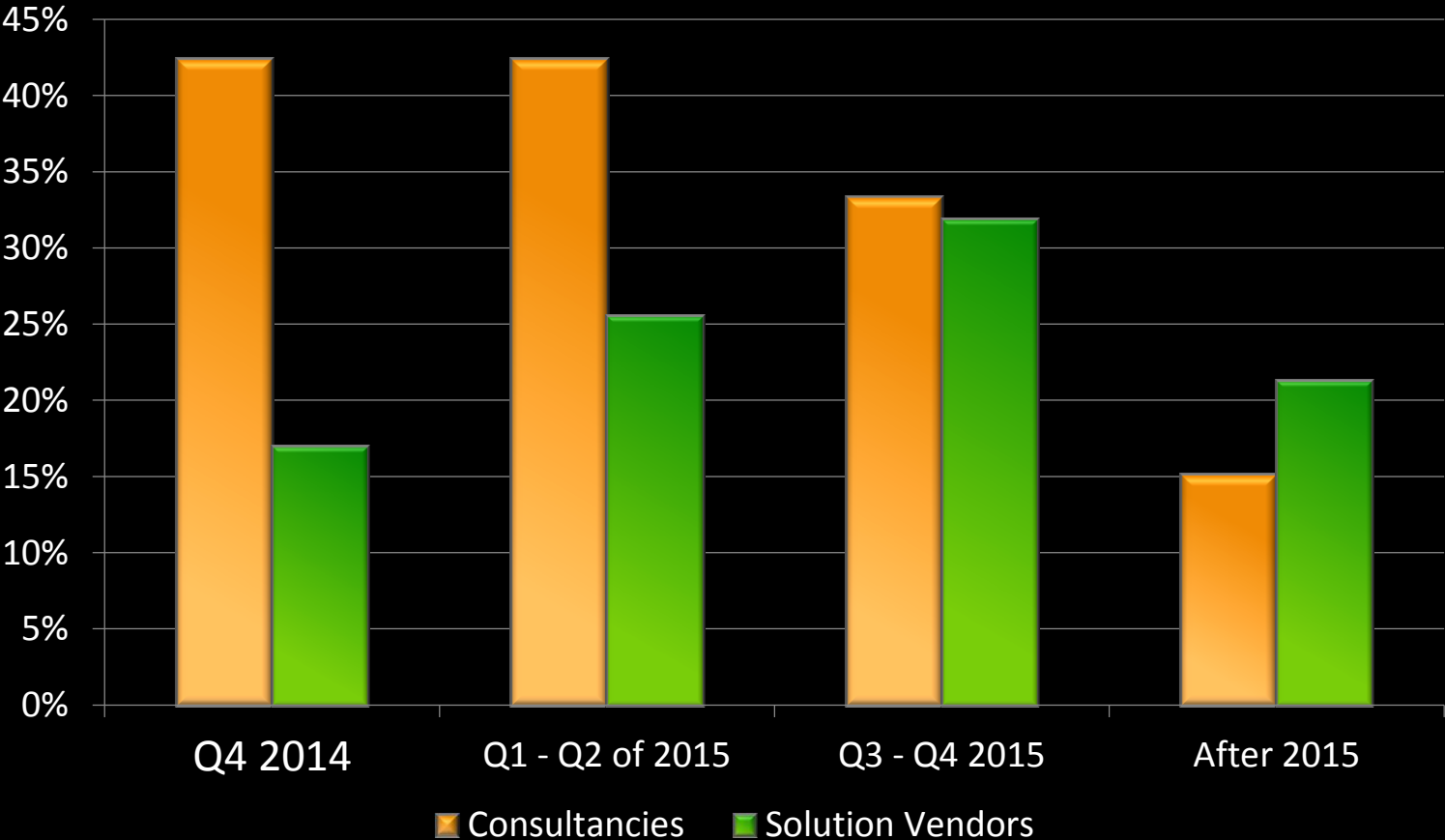


Suppliers Expectation of New Business from ESOS *



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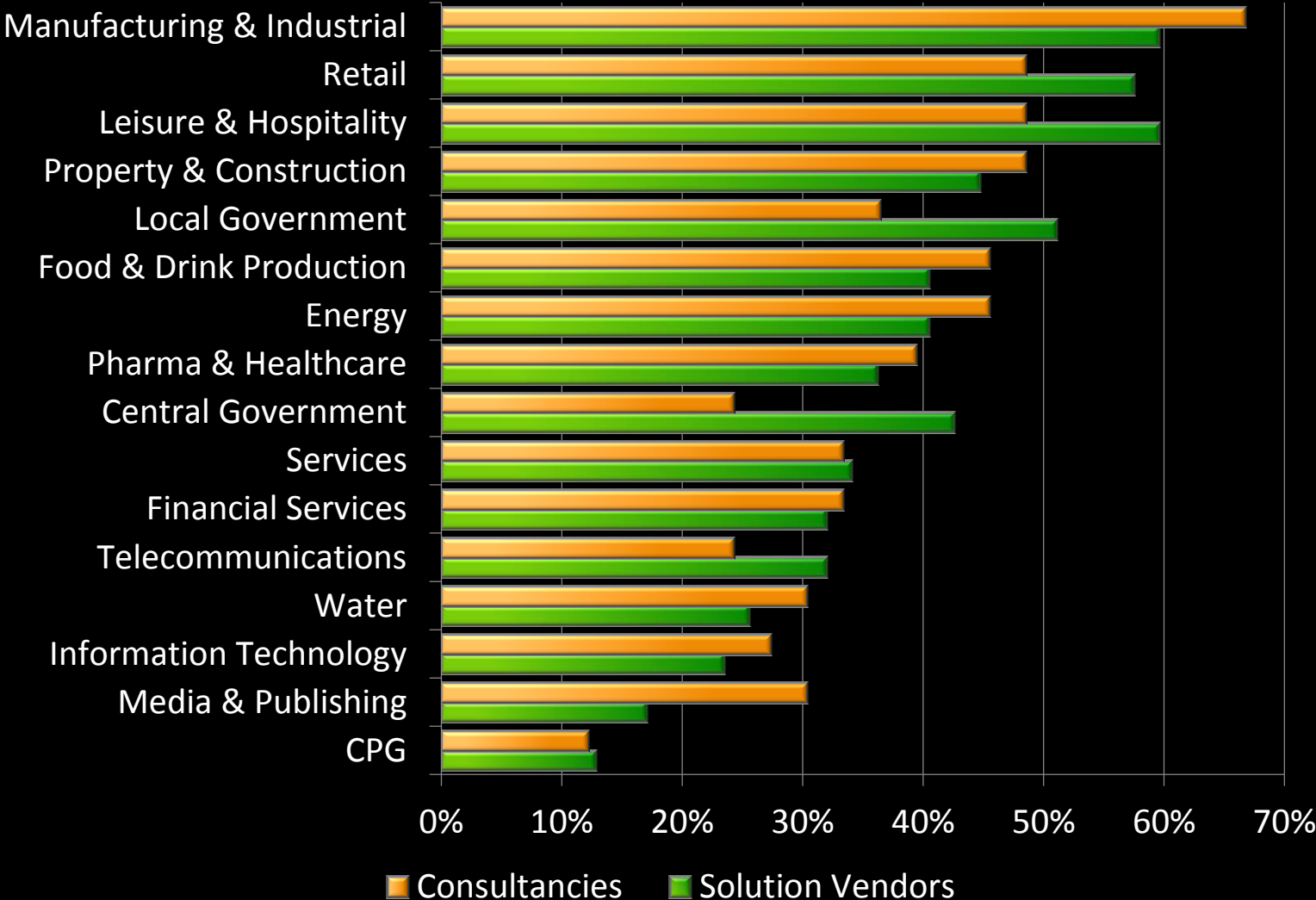
Suppliers Expectation – Primary vs. Secondary Wave



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

Sector Interest – Primary vs. Secondary Wave

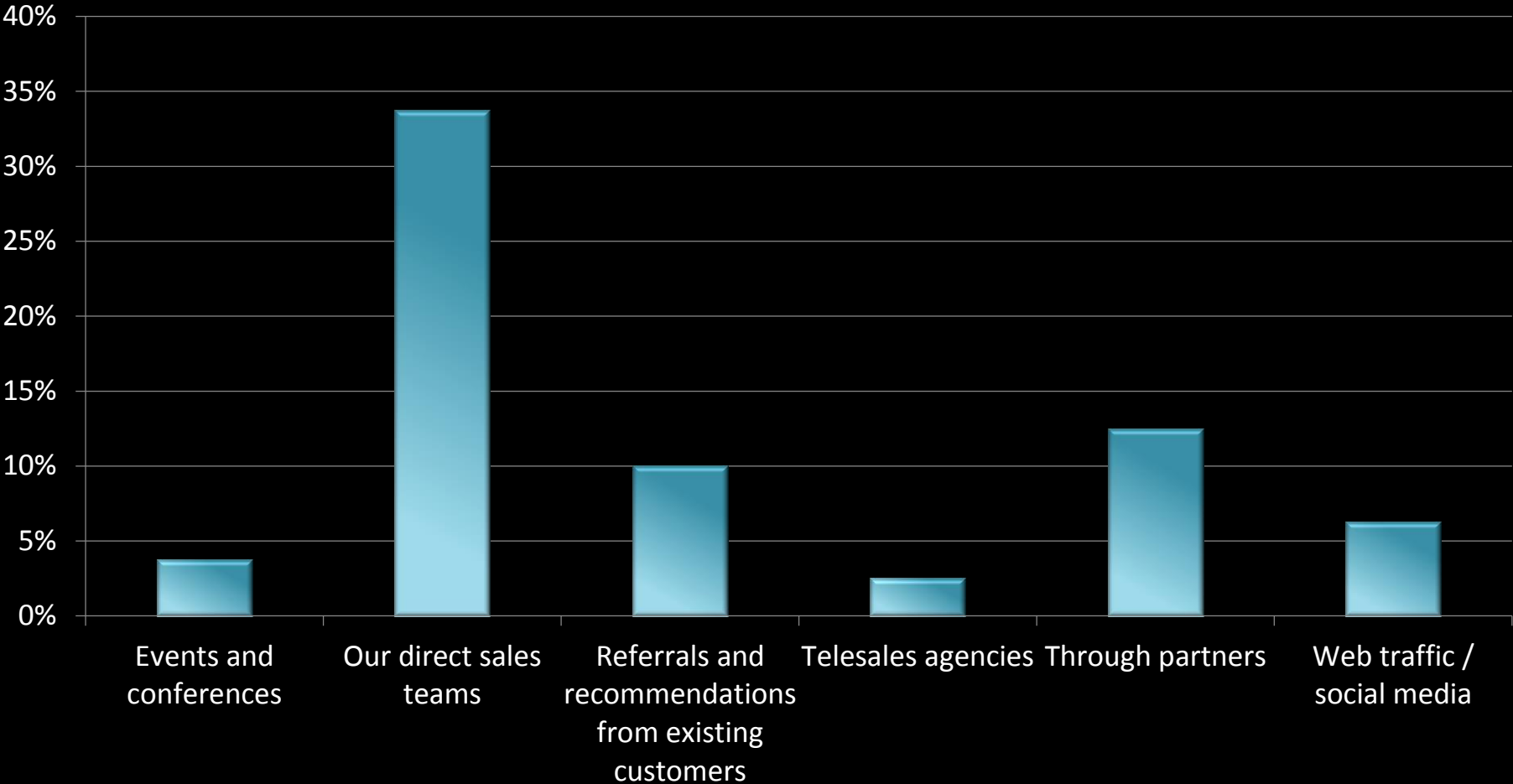


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



How do you get your leads

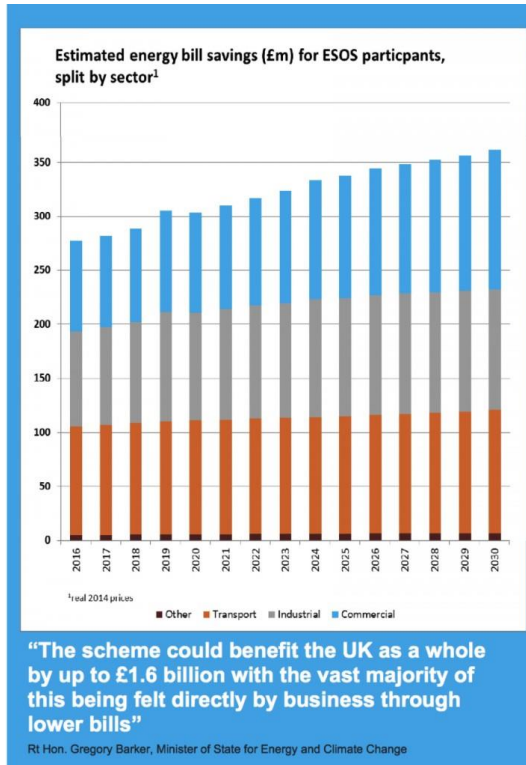


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



How big will the ESOS market be?



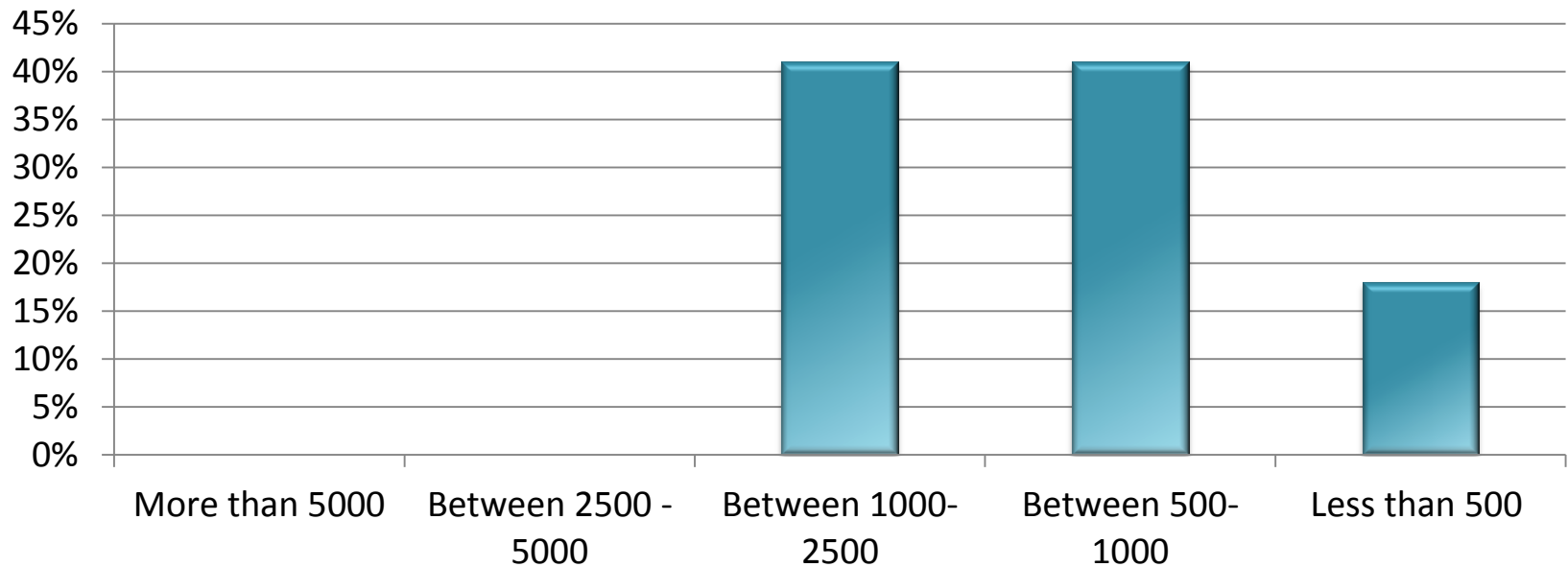
Qualifying the ESOS Opportunity in 10,000 Companies			
% of ESOS Participants taking action	5	10	50
No. of Companies	500	1,000	5,000

How difficult is it to find a good ESOS prospect prepared to invest in Energy Efficiency?

How big will the ESOS market be – Webinar poll



How many ESOS participants will invest in energy saving opportunities within the first 18 months of the scheme?



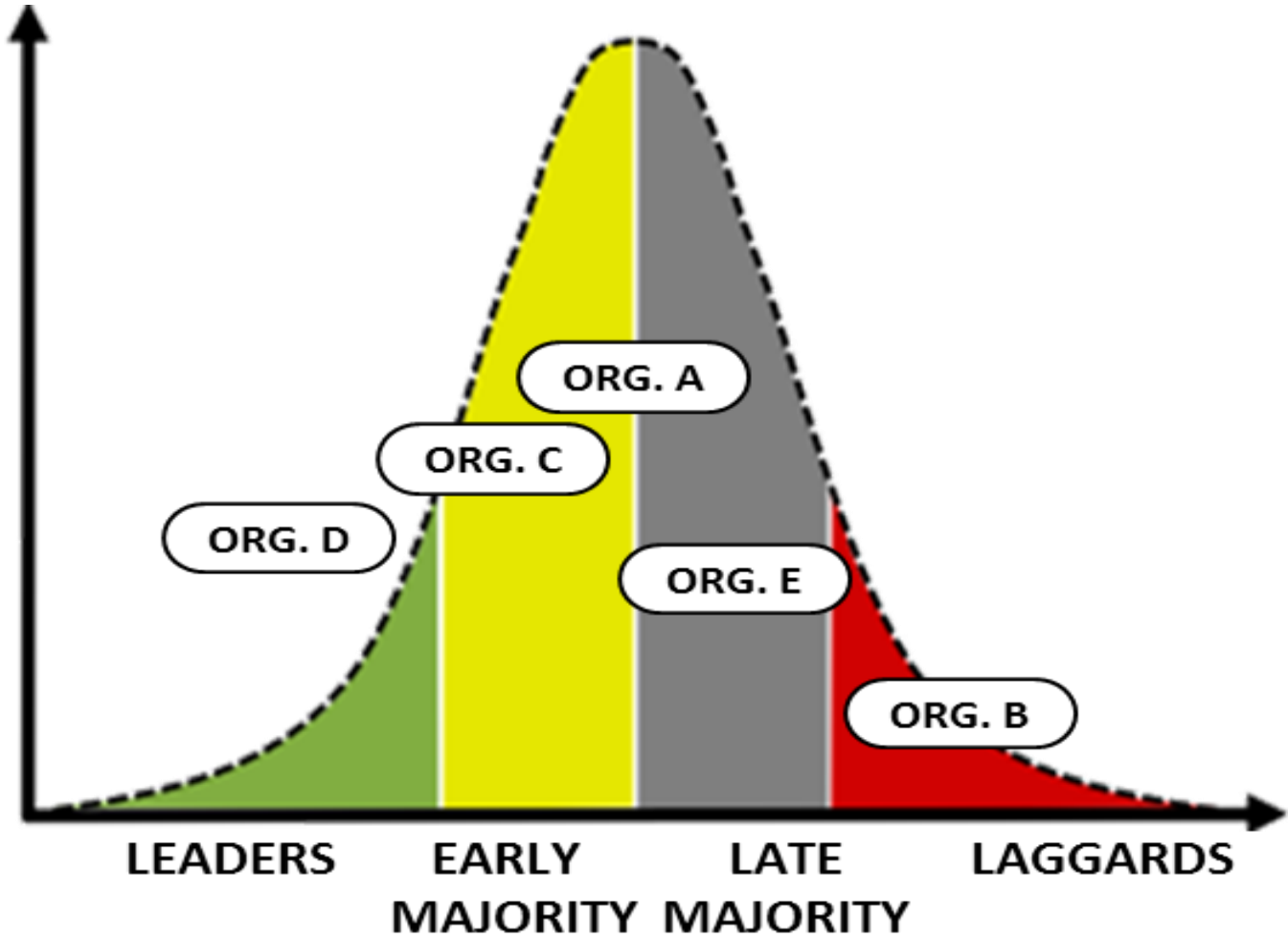
Finding ESOS prospects prepared to invest



Average Home Gate

10,234

Interest and appetite varies by Company



KEY QUESTION FOR SUPPLIERS - No. 1

Which of the 10,000 Companies affected by ESOS will invest in energy efficiency?

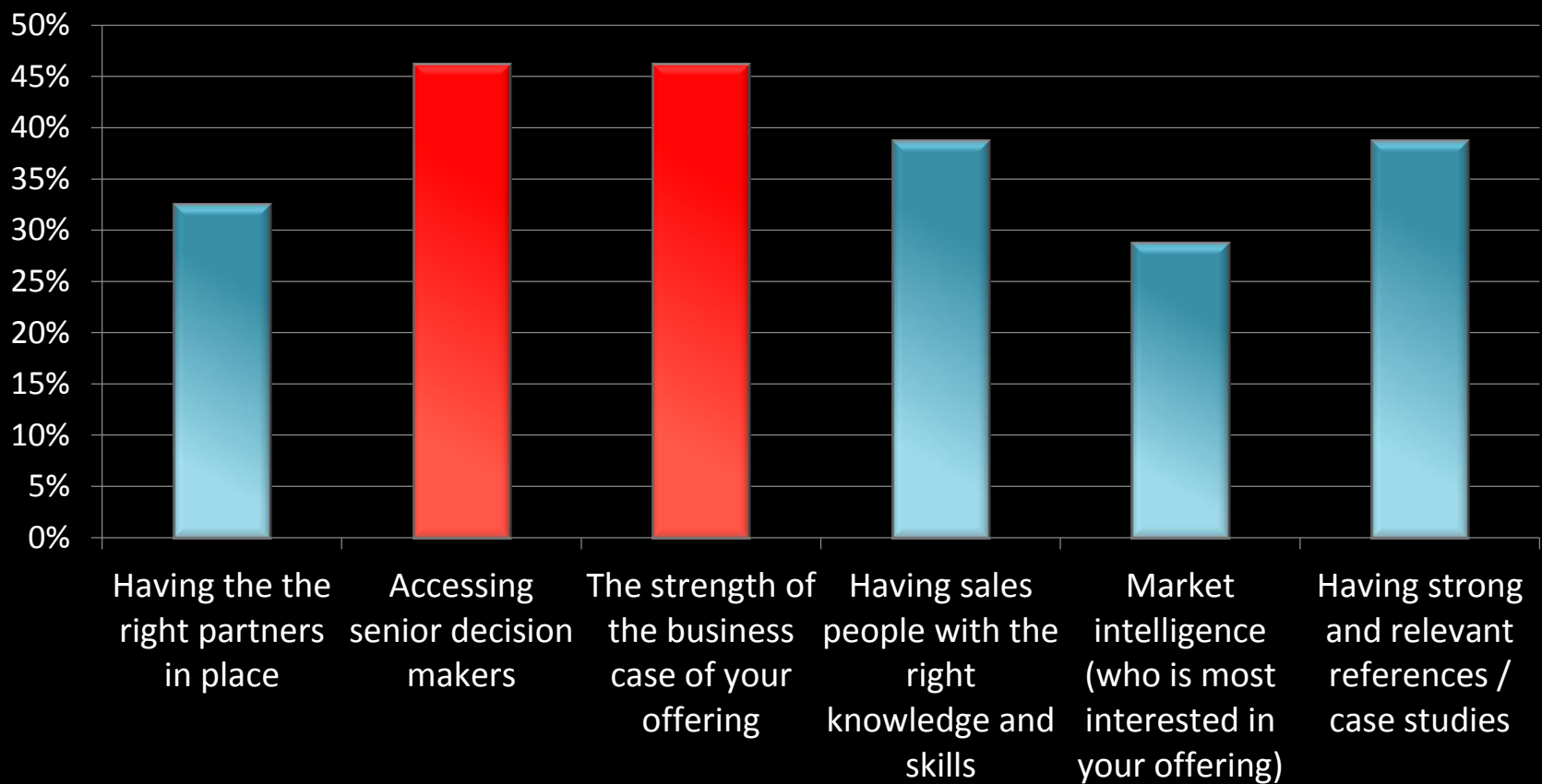


THE ESOS SUPPLIER SURVEY KEY FINDINGS

BUSINESS CASE AND THE C-SUITE



Key Factors for success in the ESOS market *



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

Key Factors for success in the ESOS market *



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

The C-Suite Inside Large Businesses Are Interested in ESOS



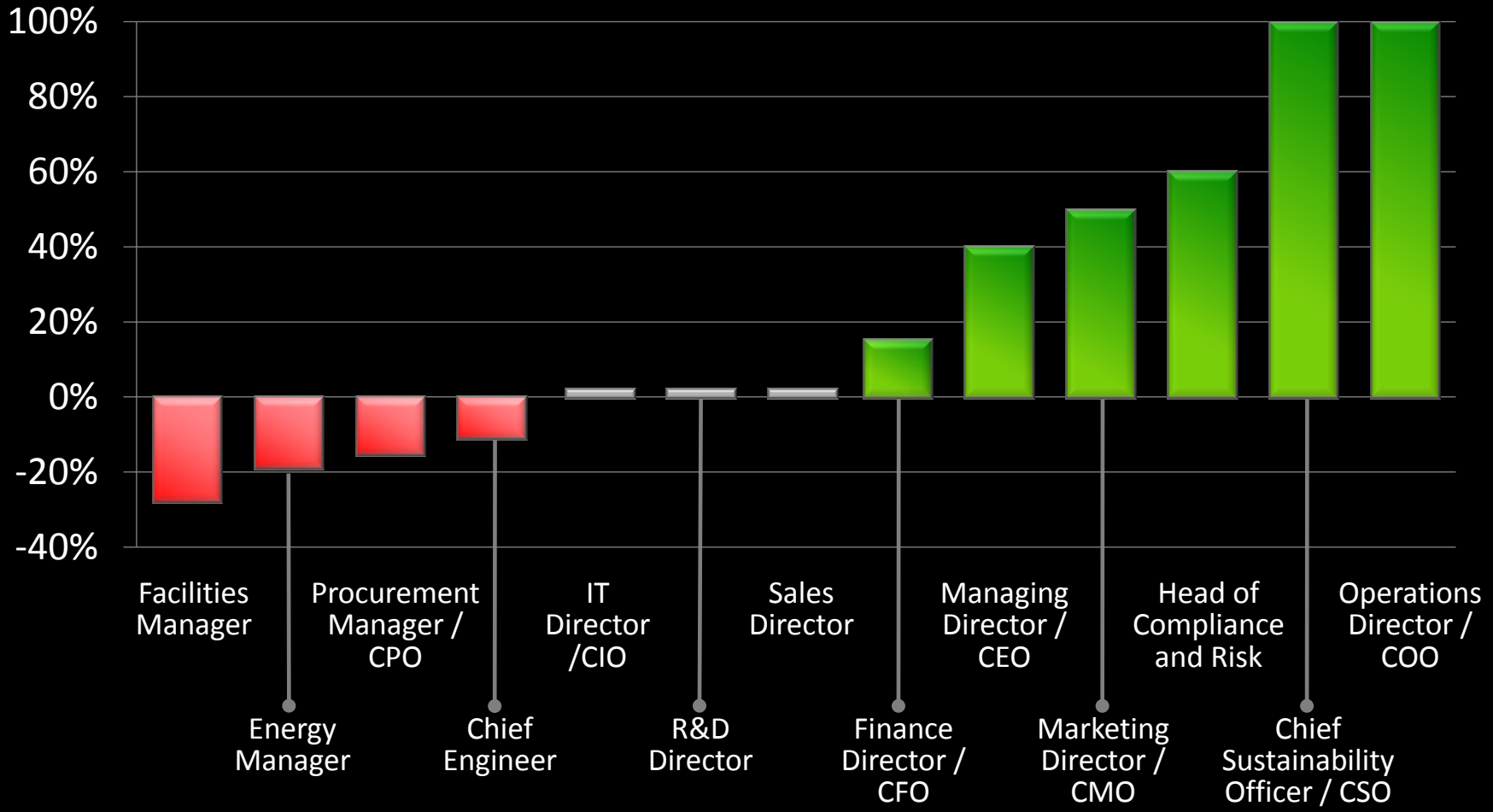
Which Roles are interested in ESOS



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

SHIFT IN WHO WILL BE THE KEY DECISION MAKERS OVER THE NEXT 2 YEARS *

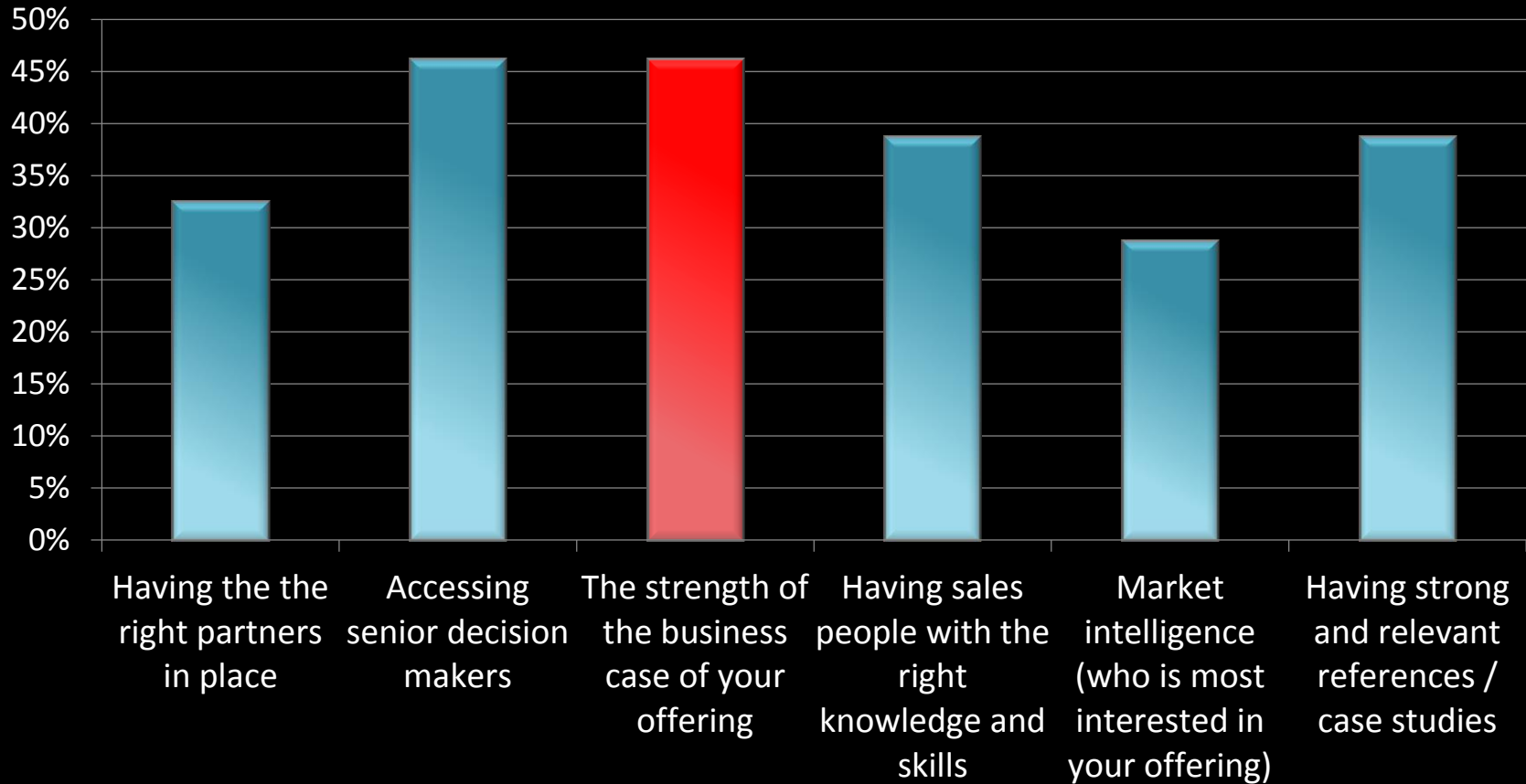


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



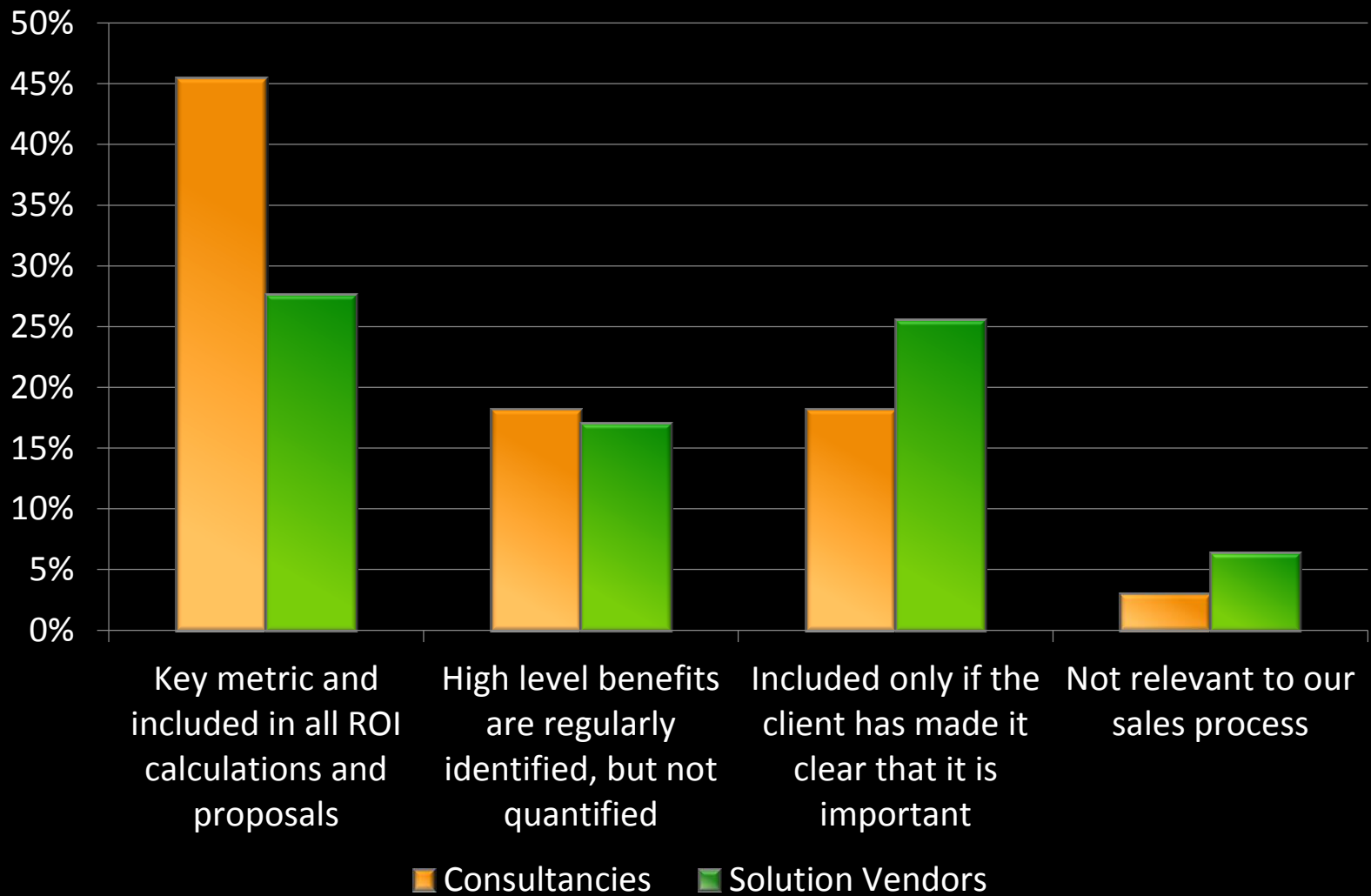
Key Factors for success in the ESOS market *



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

Carbon Abatement and the Business Case



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

The C-Suite Inside Large Businesses Are Interested in ESOS



ESOS will grow into a bigger Sustainability opportunity



Client C-Suite Interest In ESOS



Progress Towards Sustainable Business Goals

Finding good ESOS prospects?

- Energy Security
- Energy Demand and Costs
- Population Growth
- Consumer Demand
- Climate Change
- Investor Pressures
- Millennials Influence
- Political Environment
- Government Policy
- Carbon Price

What's your
client's view
of RISK?



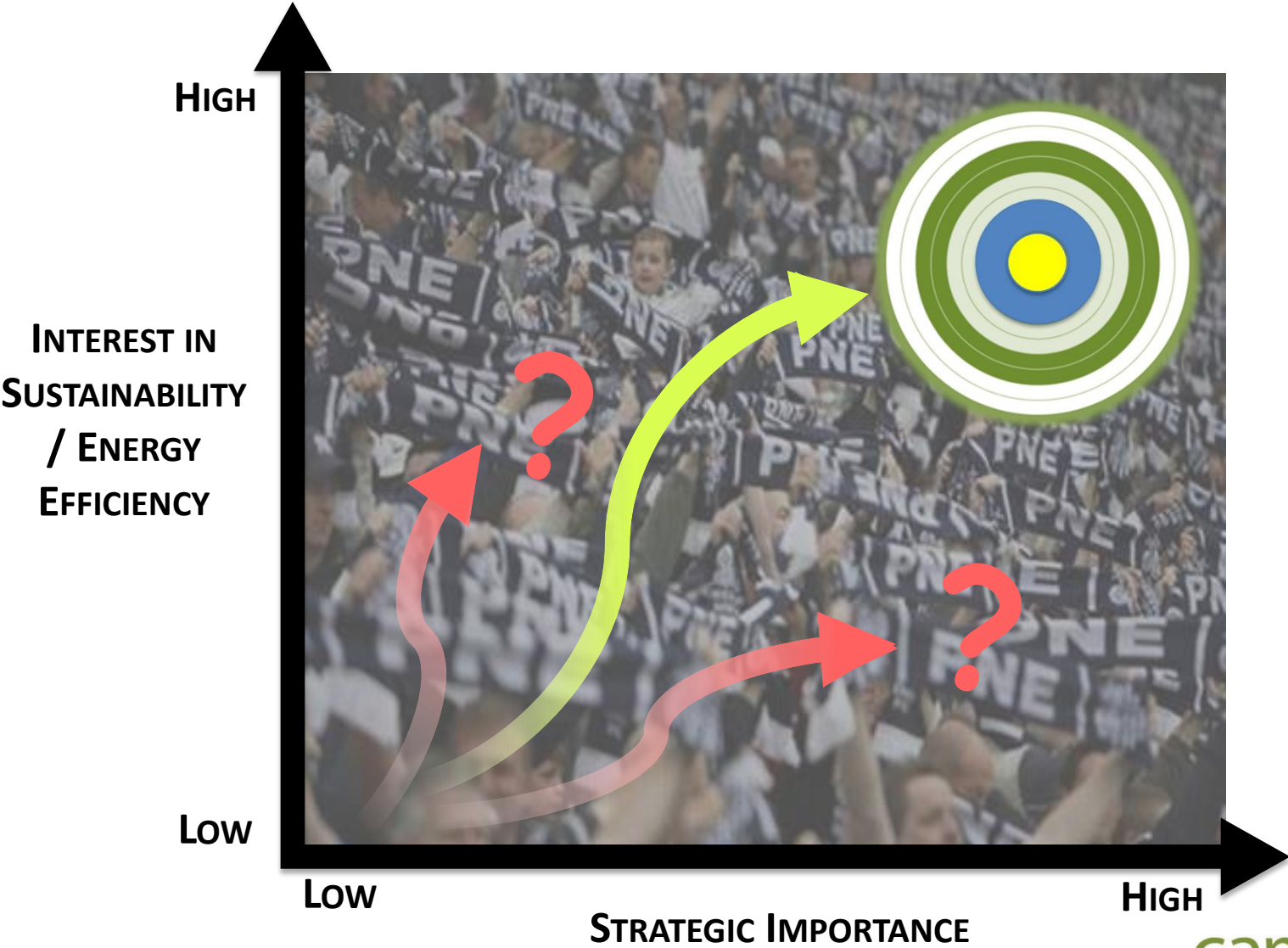
What will happen in next 15 years?

- Energy Security
- Energy Demand and Costs
- Population Growth
- Consumer Demand
- Climate Change
- Investor Pressures
- Millennials Influence
- Political Environment
- Government Policy
- Carbon Price



Rising
Sustainability
Pressures
on
Businesses

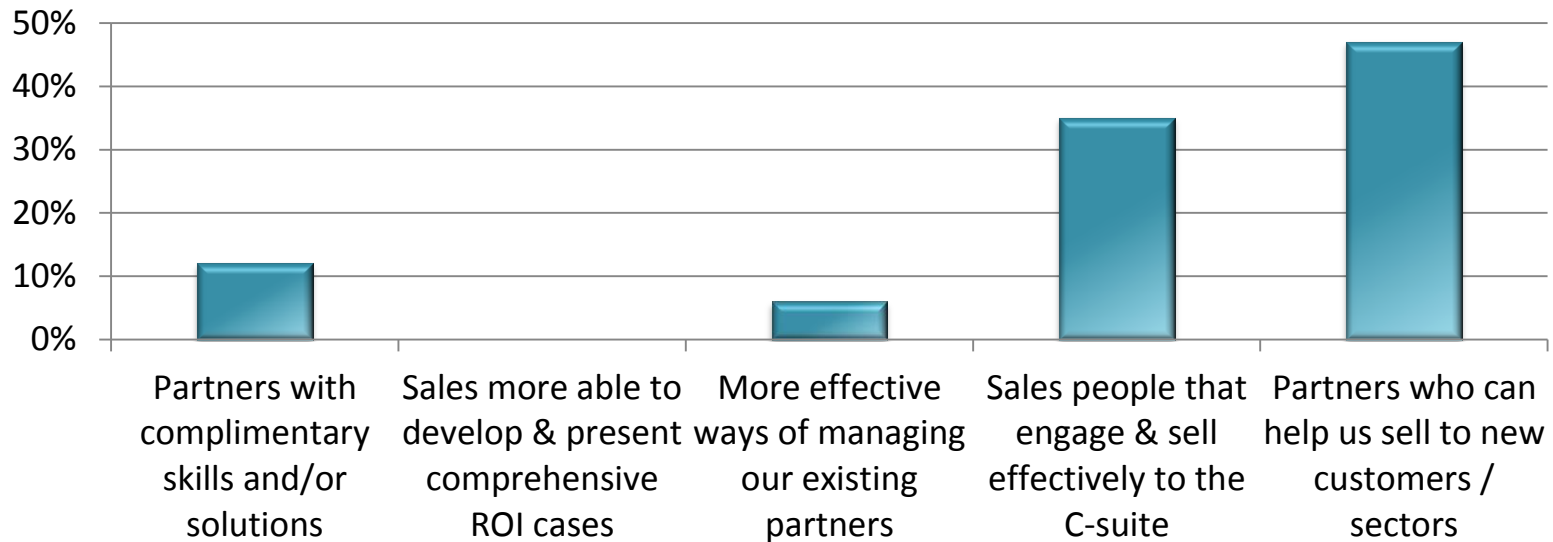
Finding the best prospects In the ESOS Crowd



Partnering Requirements – Webinar poll



What would help you build more effective sales channels (direct or indirect)?



KEY QUESTION FOR SUPPLIERS - No. 2

How will you create a compelling offer supported by a fully quantified business case?

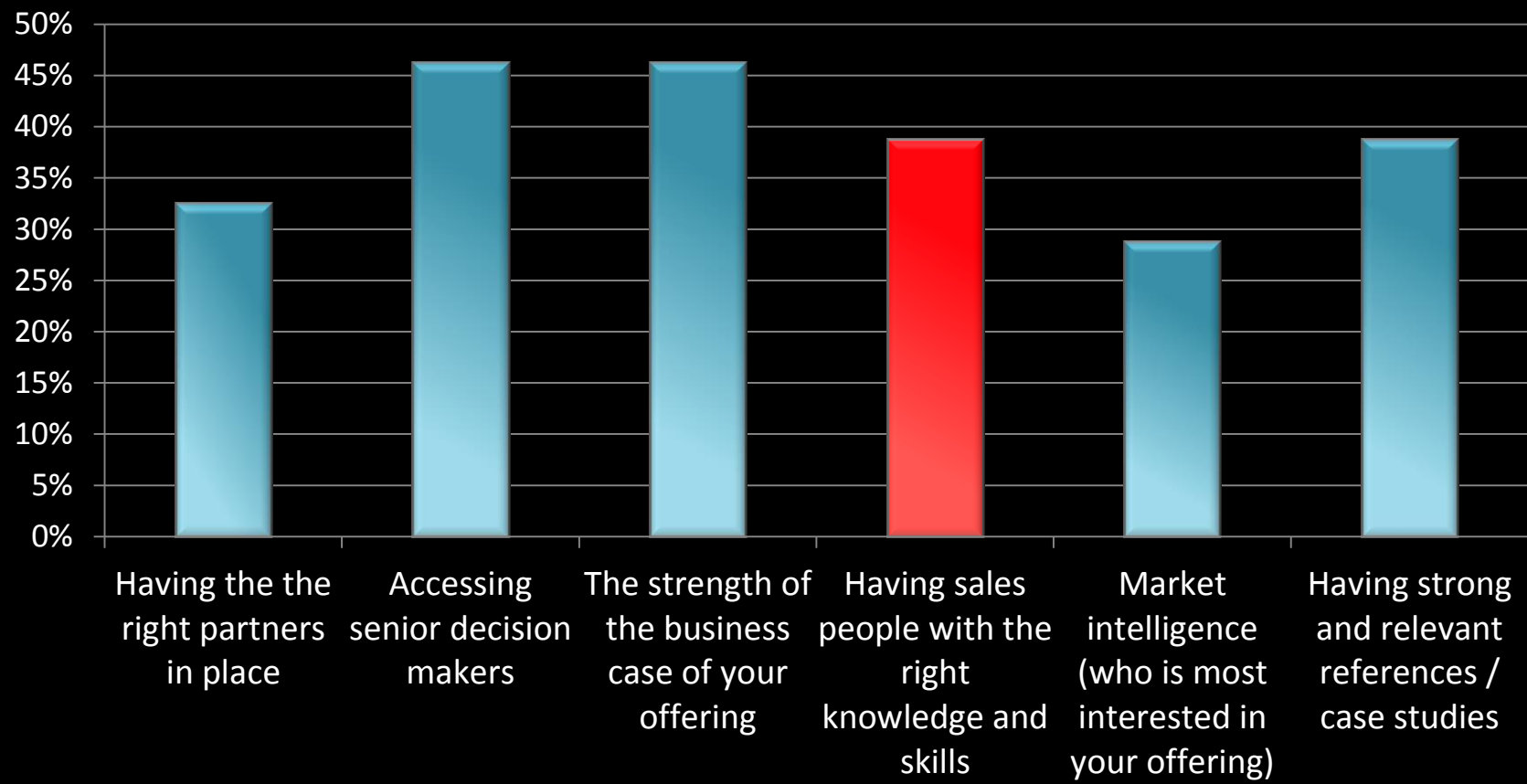


THE ESOS SUPPLIER SURVEY KEY FINDINGS

SALES CHANNELS



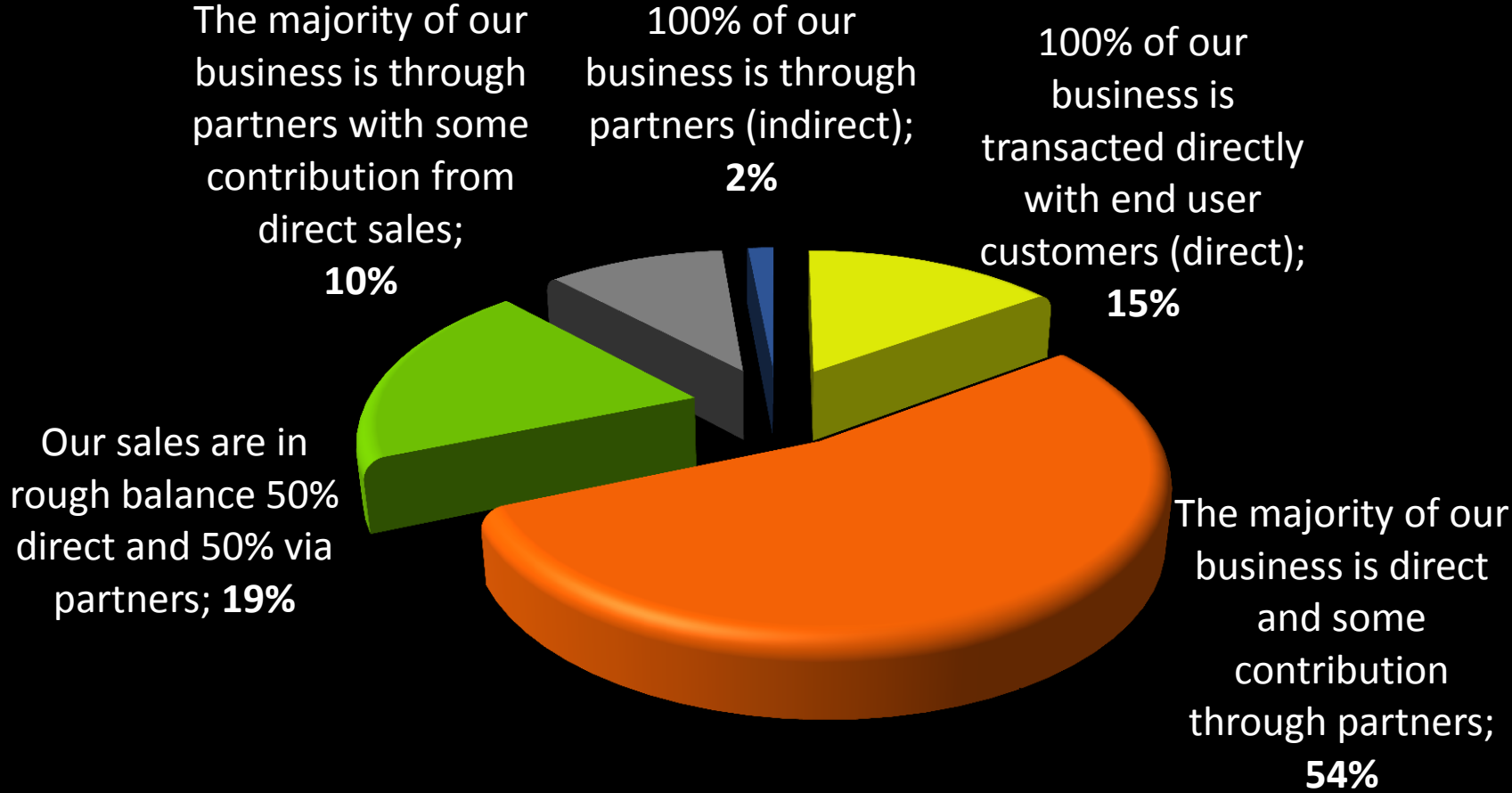
Key Factors for success in the ESOS market *



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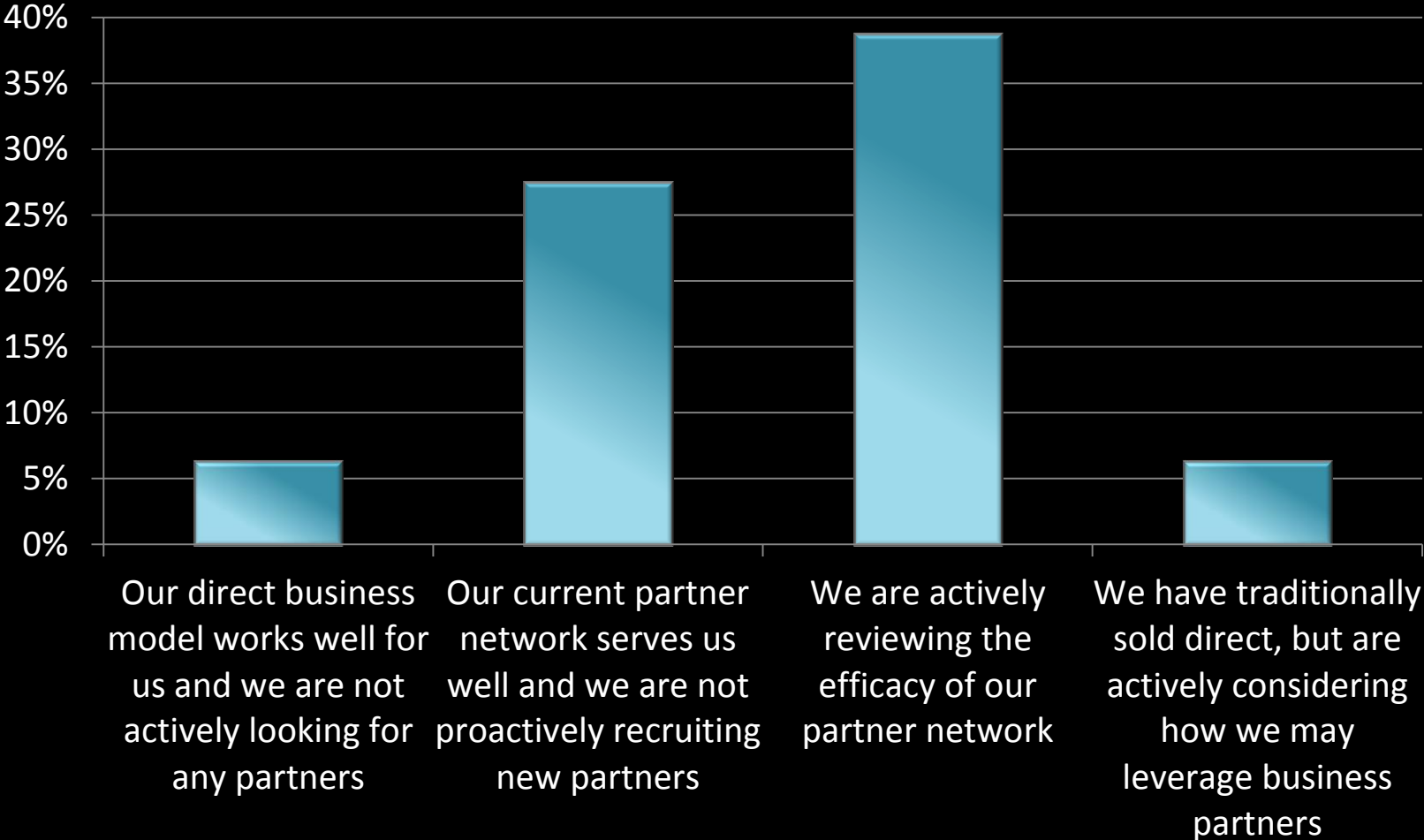
Breakdown of Partnering Activities



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

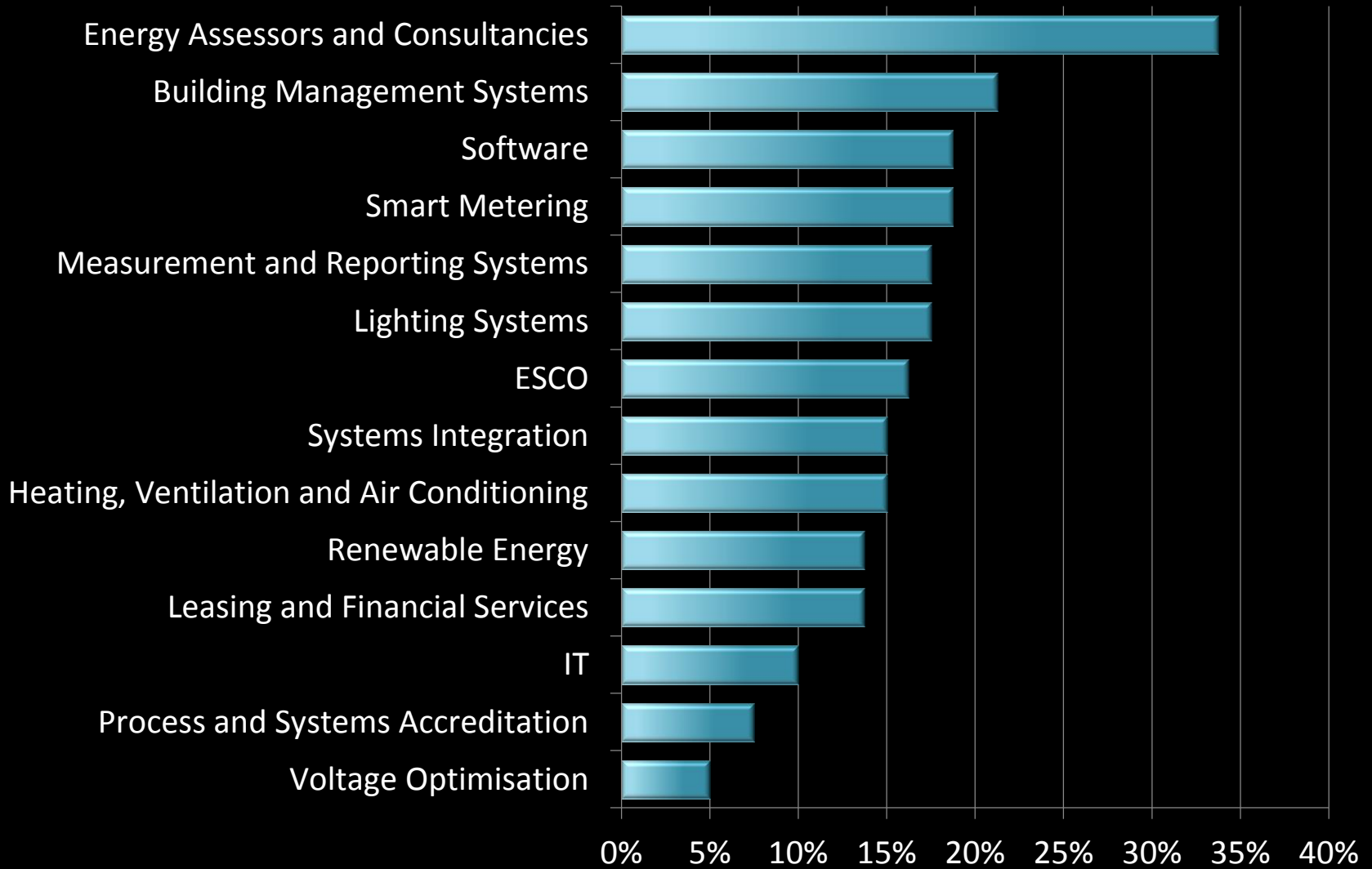
Partner Readiness



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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

Partnering Activity – who is looking for who



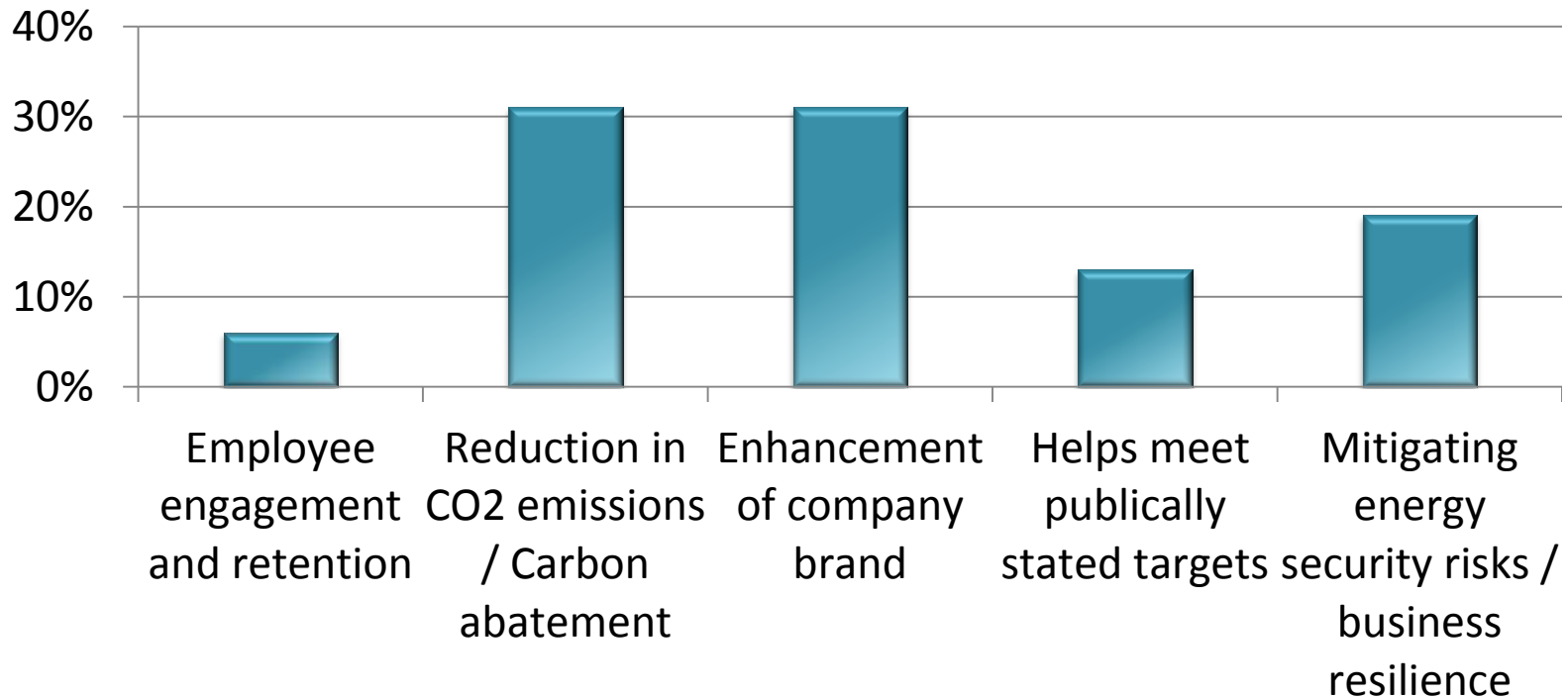
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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

Business Case Factors – Webinar poll



Other than financial, what elements would you typically include in the business case?



KEY QUESTION FOR SUPPLIERS - No. 3

How effective are your sales channels to capitalise on the ESOS Opportunity?



THREE KEY QUESTIONS FOR SUPPLIERS

1. Which of the 10,000 Companies affected by ESOS will invest in energy efficiency?
2. How will you create a compelling offer supported by a fully quantified business case?
3. How effective are your sales channels to capitalise on the ESOS Opportunity

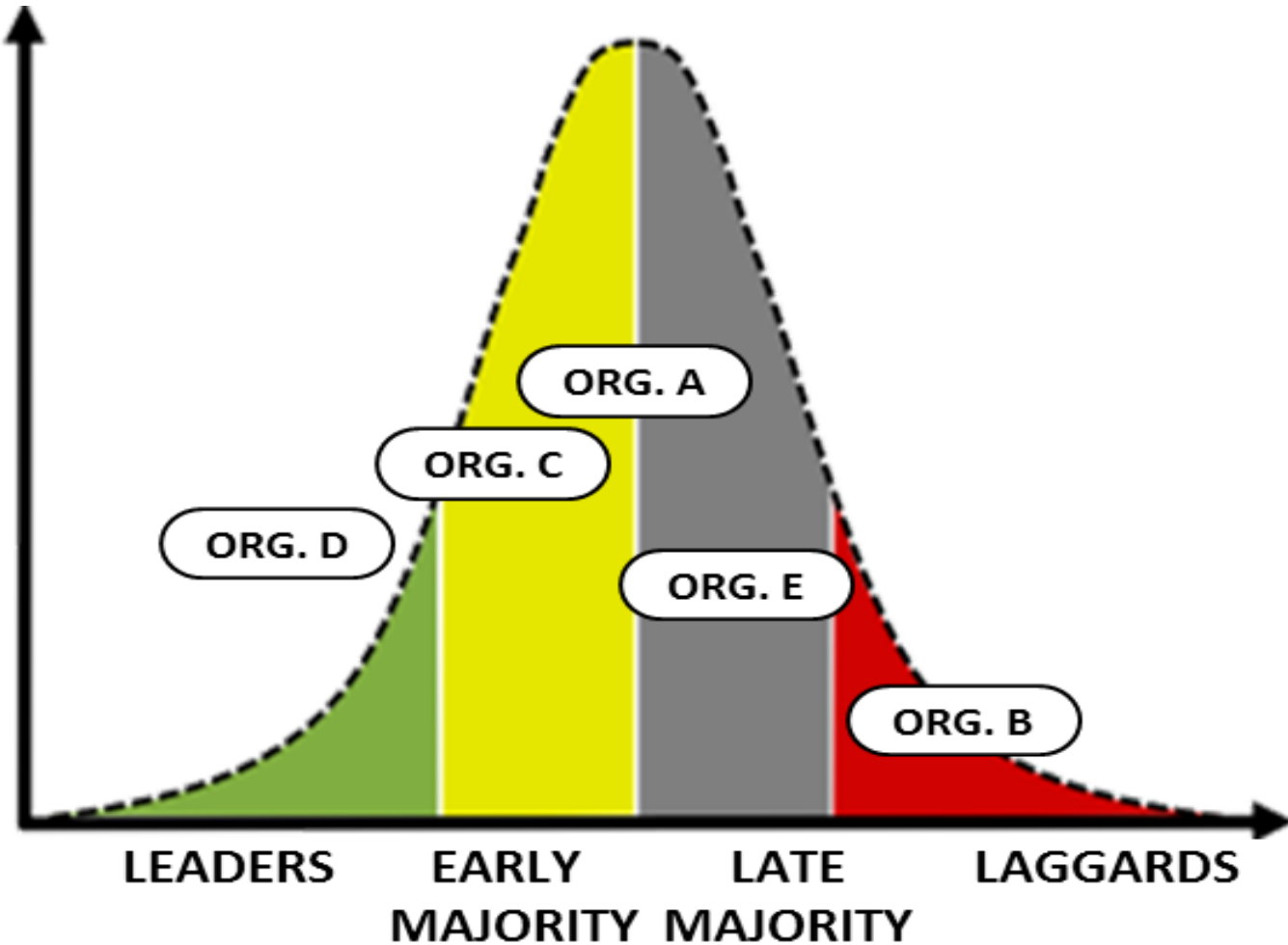


THREE KEY QUESTIONS FOR SUPPLIERS

- **Which of the 10,000 Companies affected by ESOS will invest in energy efficiency?**
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 2. How effective are your sales channels to capitalise on the ESOS Opportunity

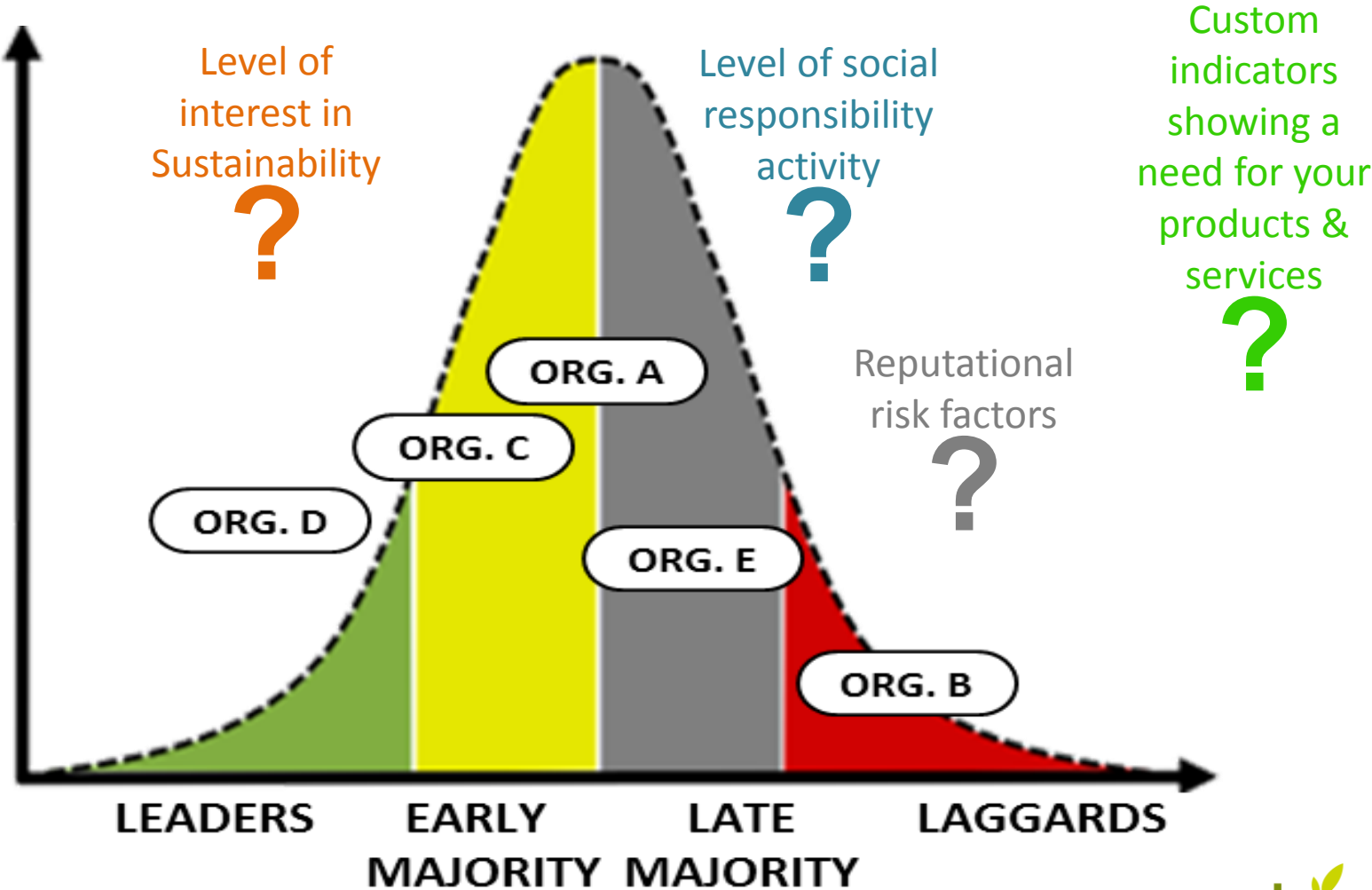


Interest and appetite for action varies by Company



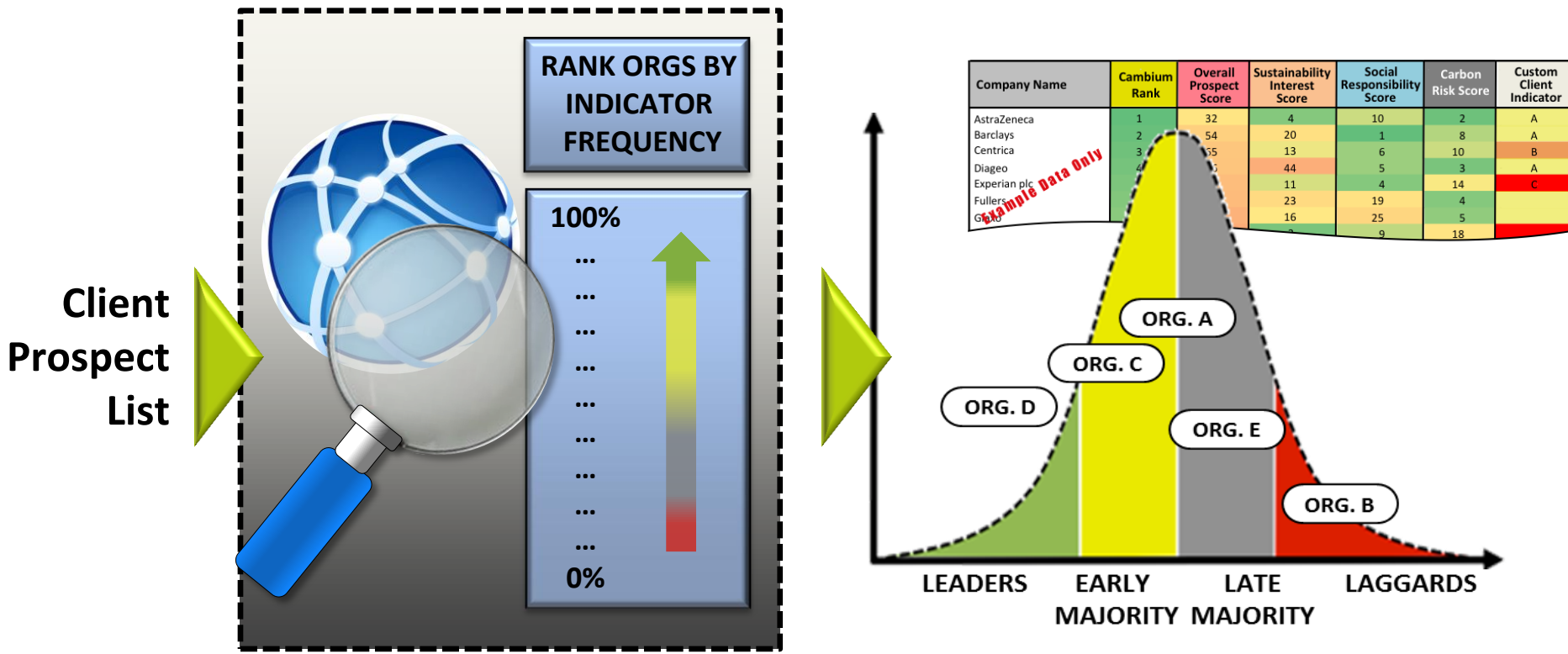
Interest in Sustainability varies by Company

[Find out more on how to identify and rank your best prospects here](#)



How it works

Sustainability Prospector™

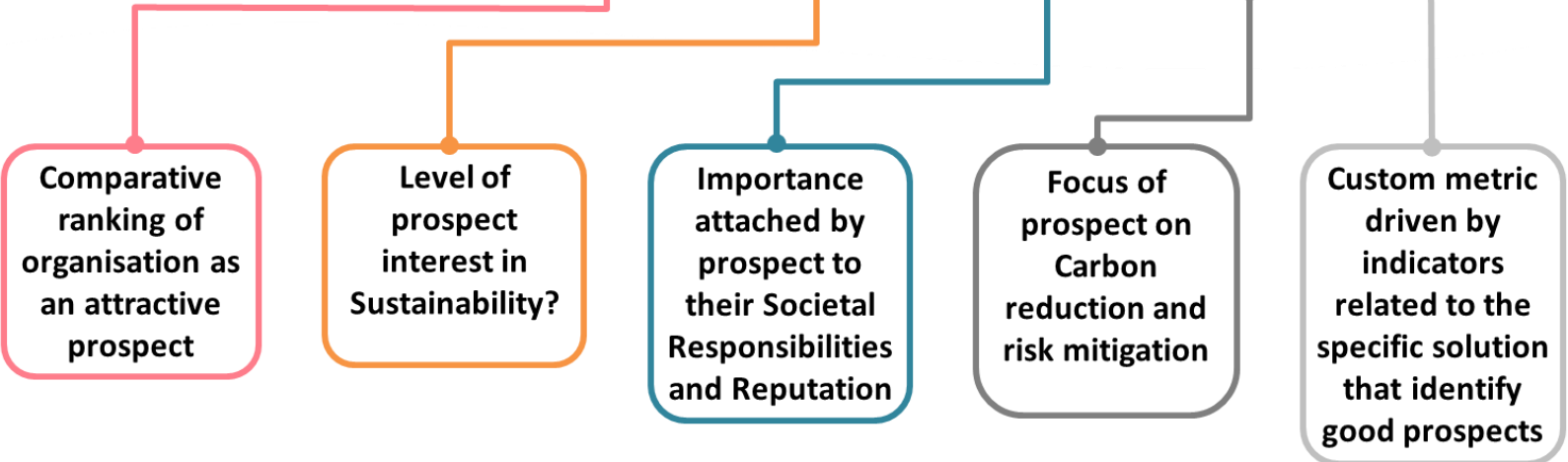


Organisations are categorised in terms of their likelihood to invest in products & services relevant to YOUR OFFERINGS

Sustainability Prospector™ Sample Database

Company Name	Cambium Rank	Overall Prospect Score	Sustainability Interest Score	Social Responsibility Score	Carbon Risk Score	Custom Client Indicator
AstraZeneca	1	32	4	10	2	A
Barclays	2	54	20	1	8	A
Centrica	3	65	13	6	10	B
Diageo	4	66	44	5	3	A
Experian plc	5	75	11	4	14	C
Fullers	6	77	23	19	4	
Glaxo	7	86	16	25	5	

Example Data Only



This process can be applied to any list of named prospects

THREE KEY QUESTIONS FOR SUPPLIERS

1. Which of the 10,000 Companies affected by ESOS will invest in energy efficiency?

➤ **How will you create a compelling offer supported by a fully quantified business case?**

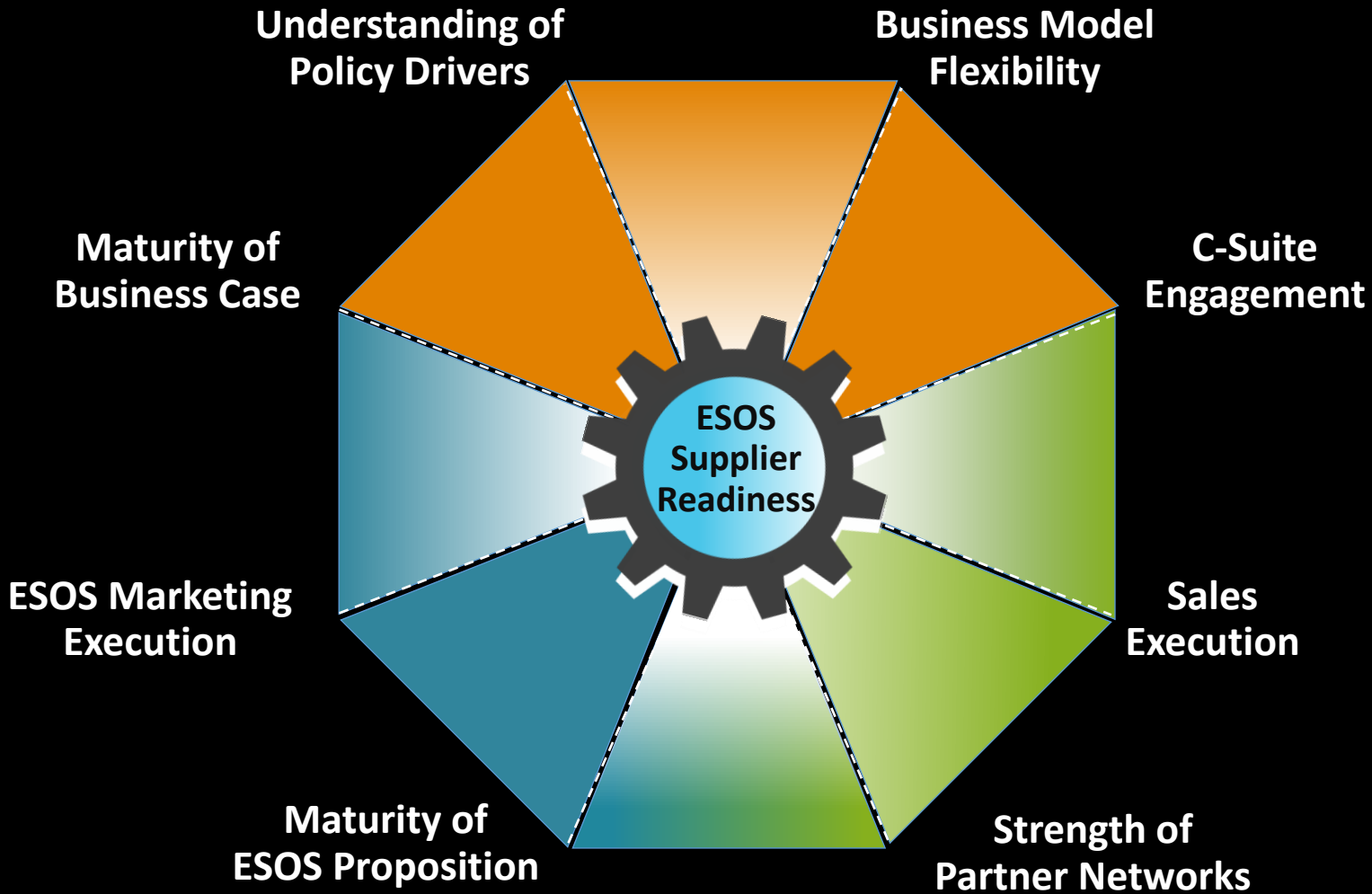
3. How effective are your sales channels to capitalise on the ESOS Opportunity



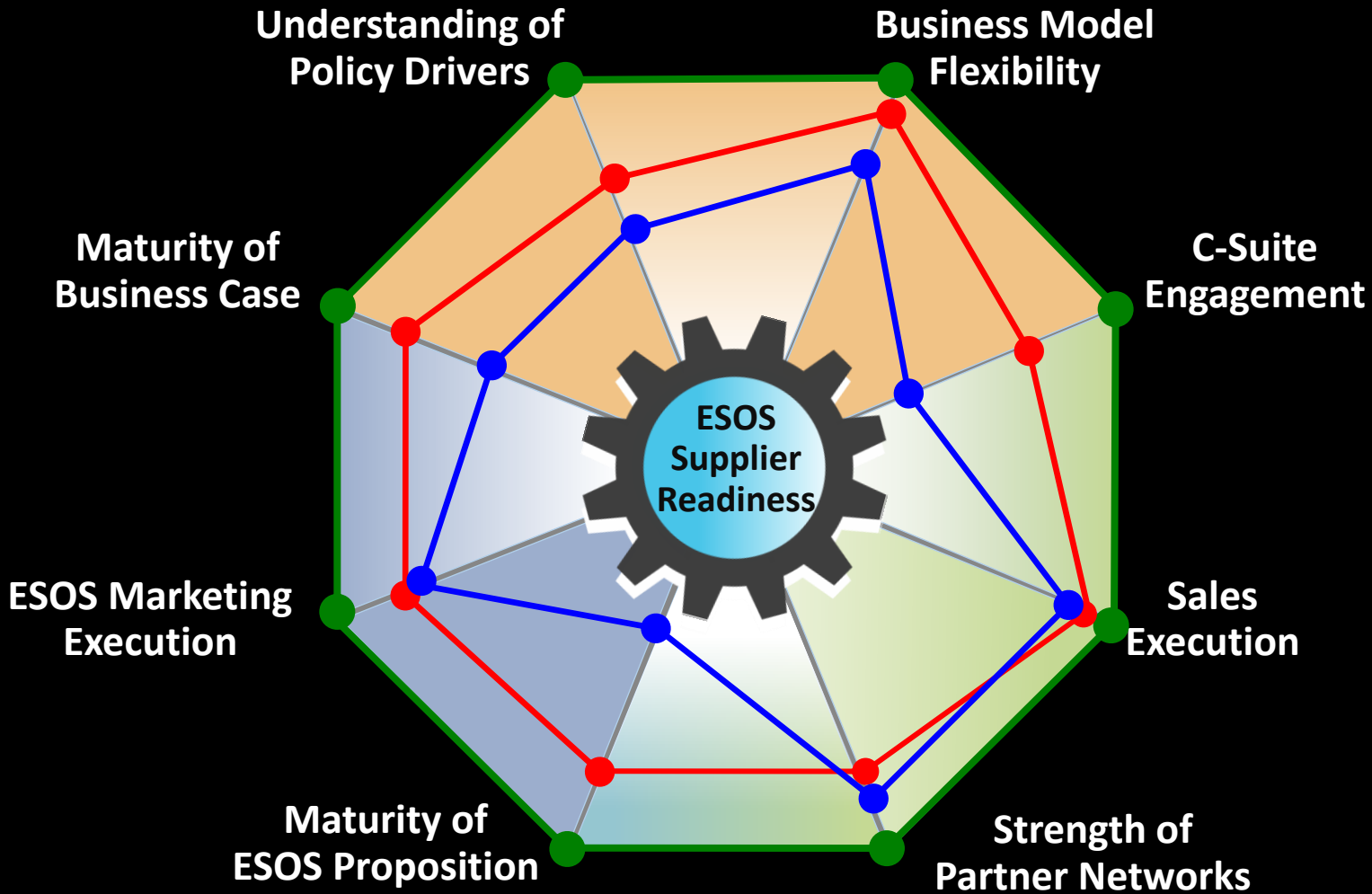
Survey Scope



Survey Scope



Information Available



 **IDEAL PROFILE**

 **TECHNOLOGY CATEGORY PROFILE (E.g BMS)**

 **YOUR PROFILE**

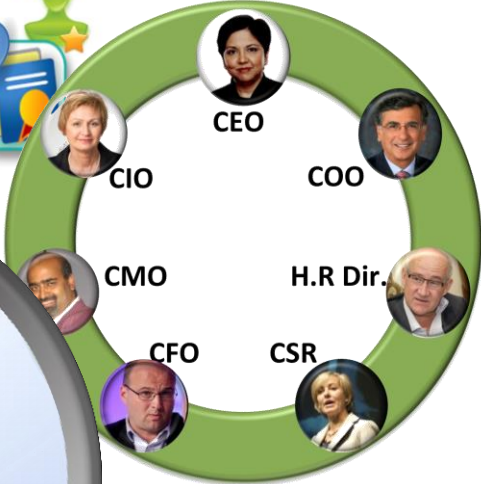
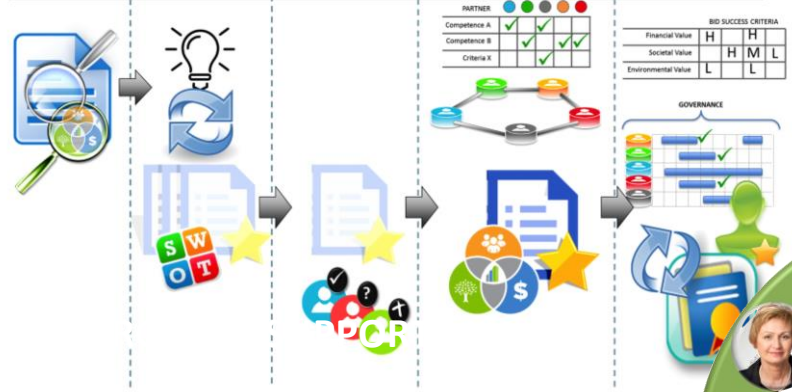
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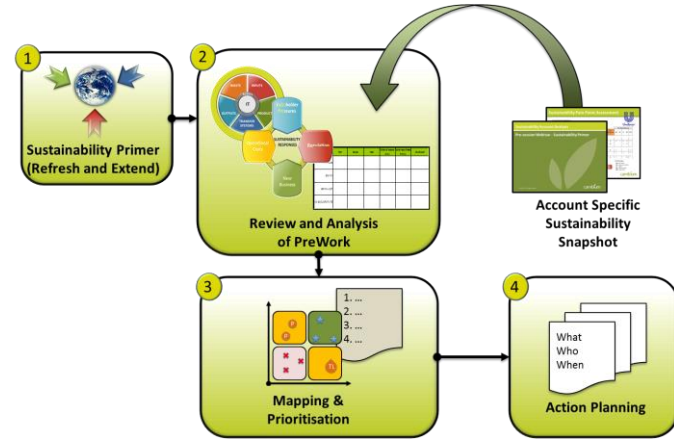
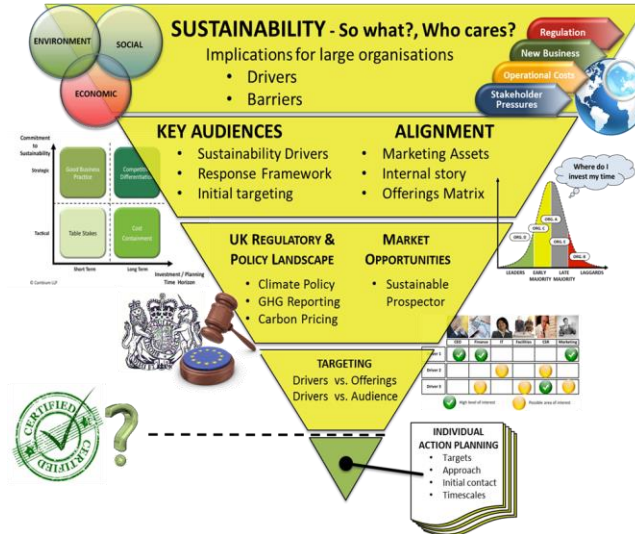


Direct Sales – Enablement and Planning

SALES PROCESS



SALES ENABLEMENT



KEY CUSTOMER PLANNING



[Find Out More](#)

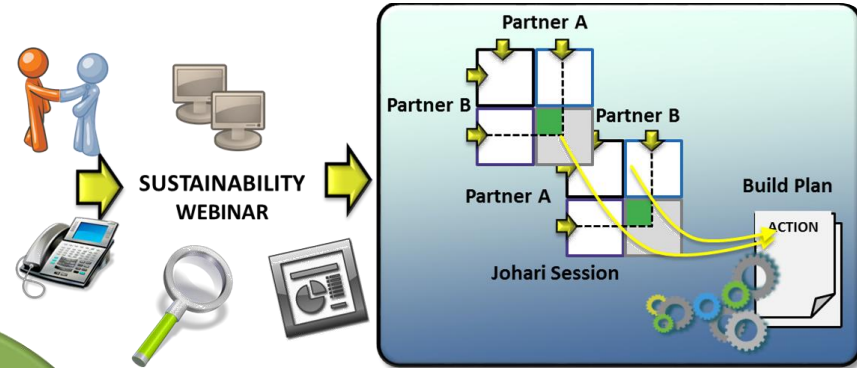
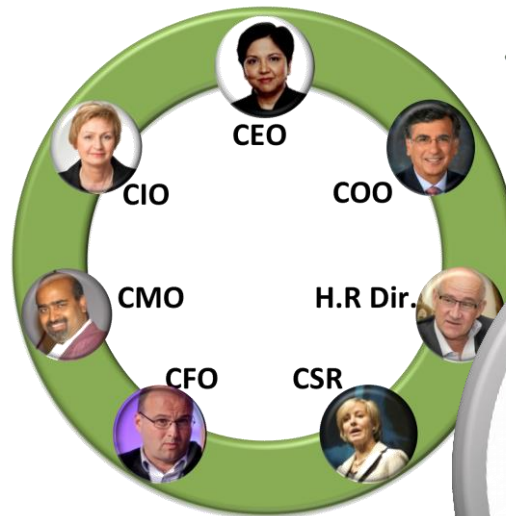
Channels and Partners – Strategy & Development



PARTNER RESEARCH



PARTNER STRATEGY



PARTNER ACCELERATION



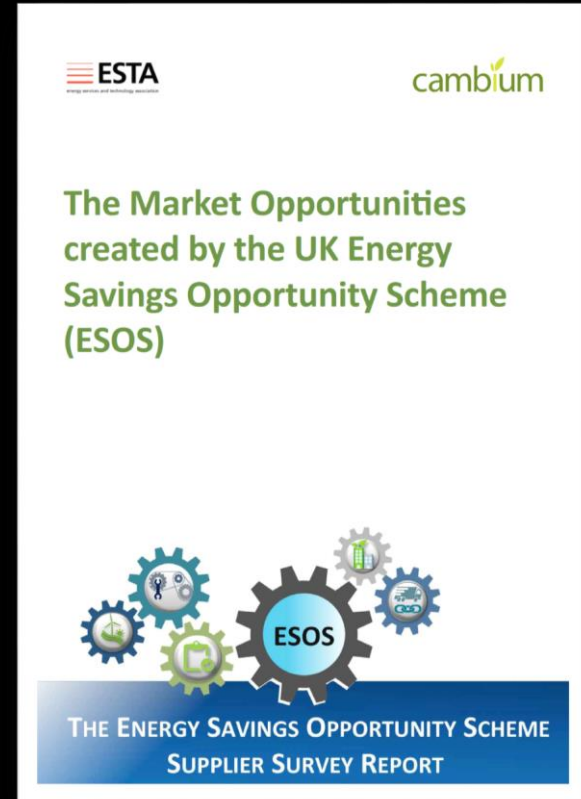
[Find Out More](#)

Summary of Survey Findings

- Find the Companies most likely to invest
- Identify the best C-Suite audiences to target
- Bring a Compelling value proposition and business case
Include quantification of benefits:
 - Economic
 - Environmental
 - Societal
- Discover the right partners to work with



Make the Most of Your **ESOS** Opportunity in 2015



Learn more about what Suppliers think about **ESOS**

[Download this Free 60 page research report](#)

Our Services

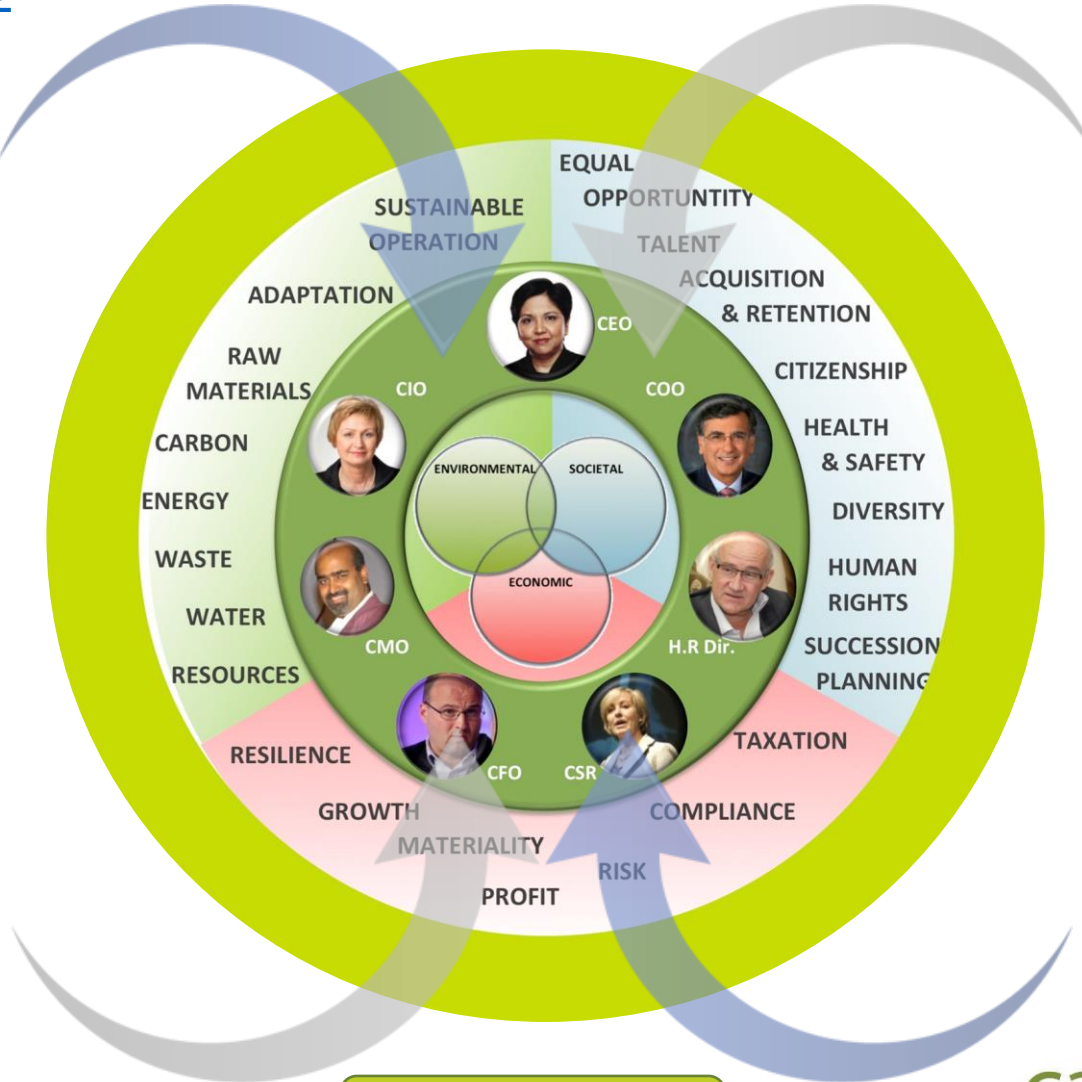
MARKETING



LEGISLATION



SALES



CHANNELS & PARTNERS



Get In touch for an exploratory discussion



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