

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**
- All Analysis at an aggregated level

Survey Structure:

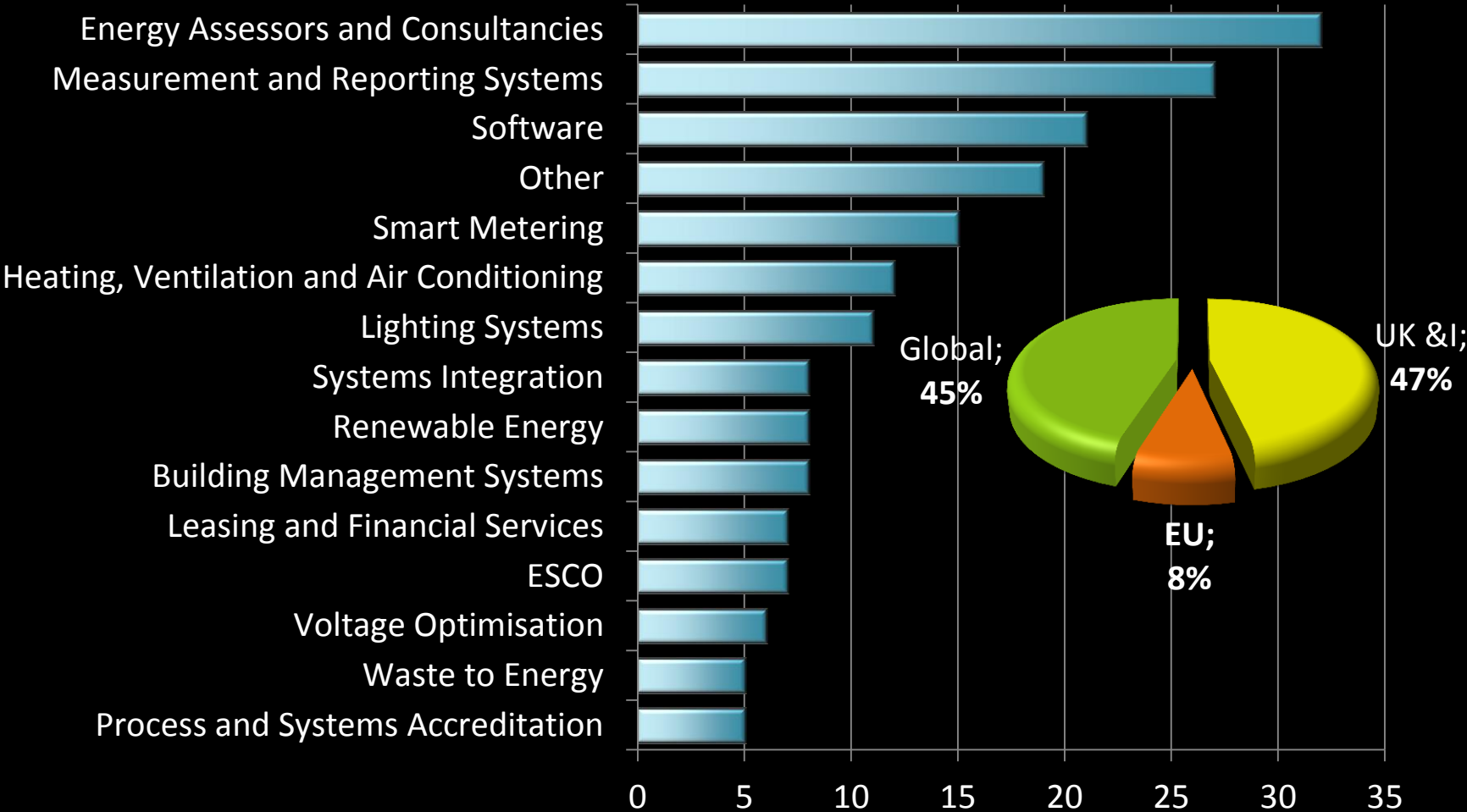
- Survey designed by Cambium, reviewed with ESTA : 30 Questions, 15 mins
- Focus- Attitudes to ESOS Market Opportunity
- Topics: ESOS Dynamics, Policy, Sales & Marketing

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

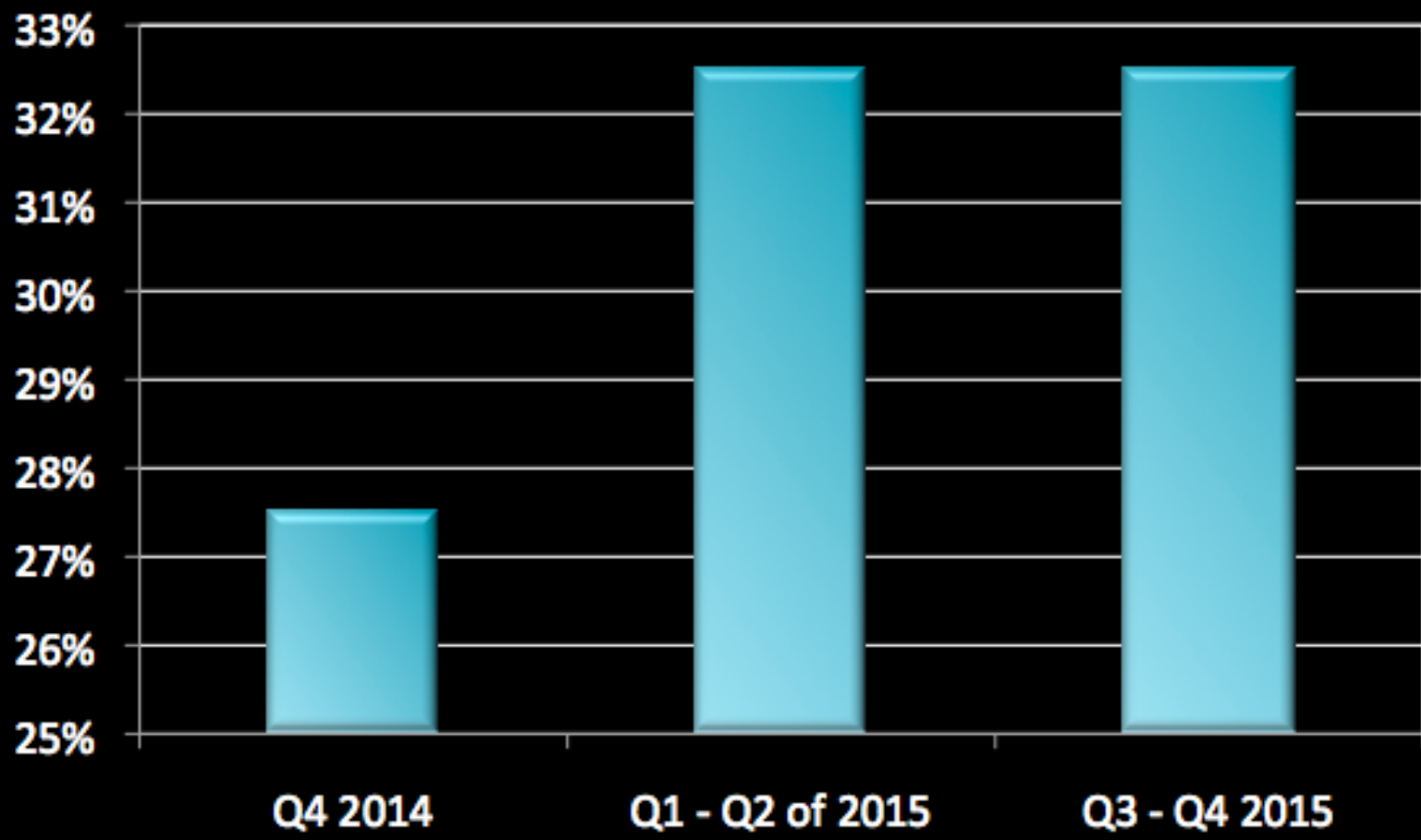
- ESOS Support Available From Cambium
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THE ESOS SUPPLIER SURVEY KEY FINDINGS

MARKETS AND PROSPECTS



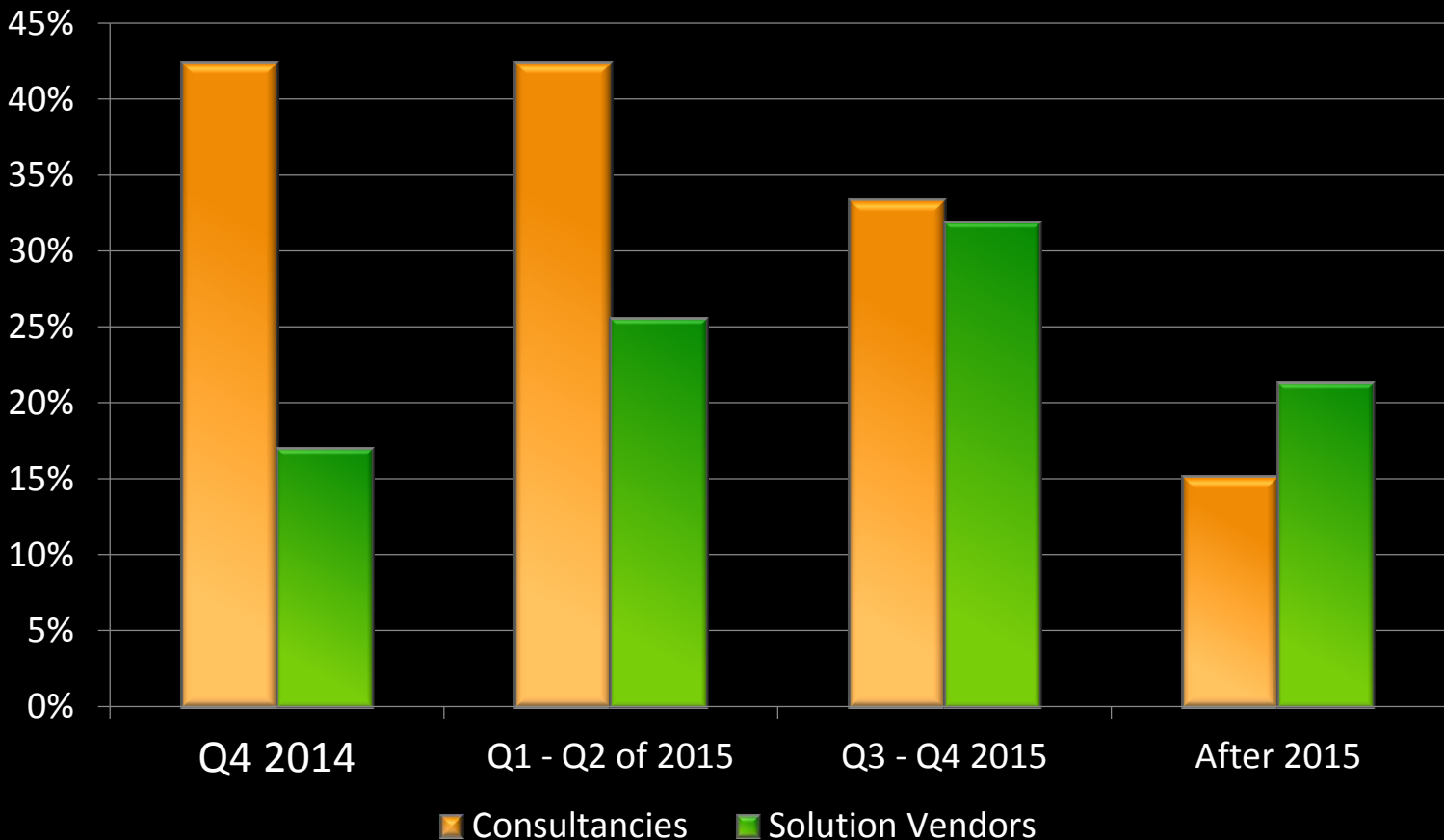
Suppliers Expectation of New Business from ESOS *



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

Suppliers Expectation – Primary vs. Secondary Wave

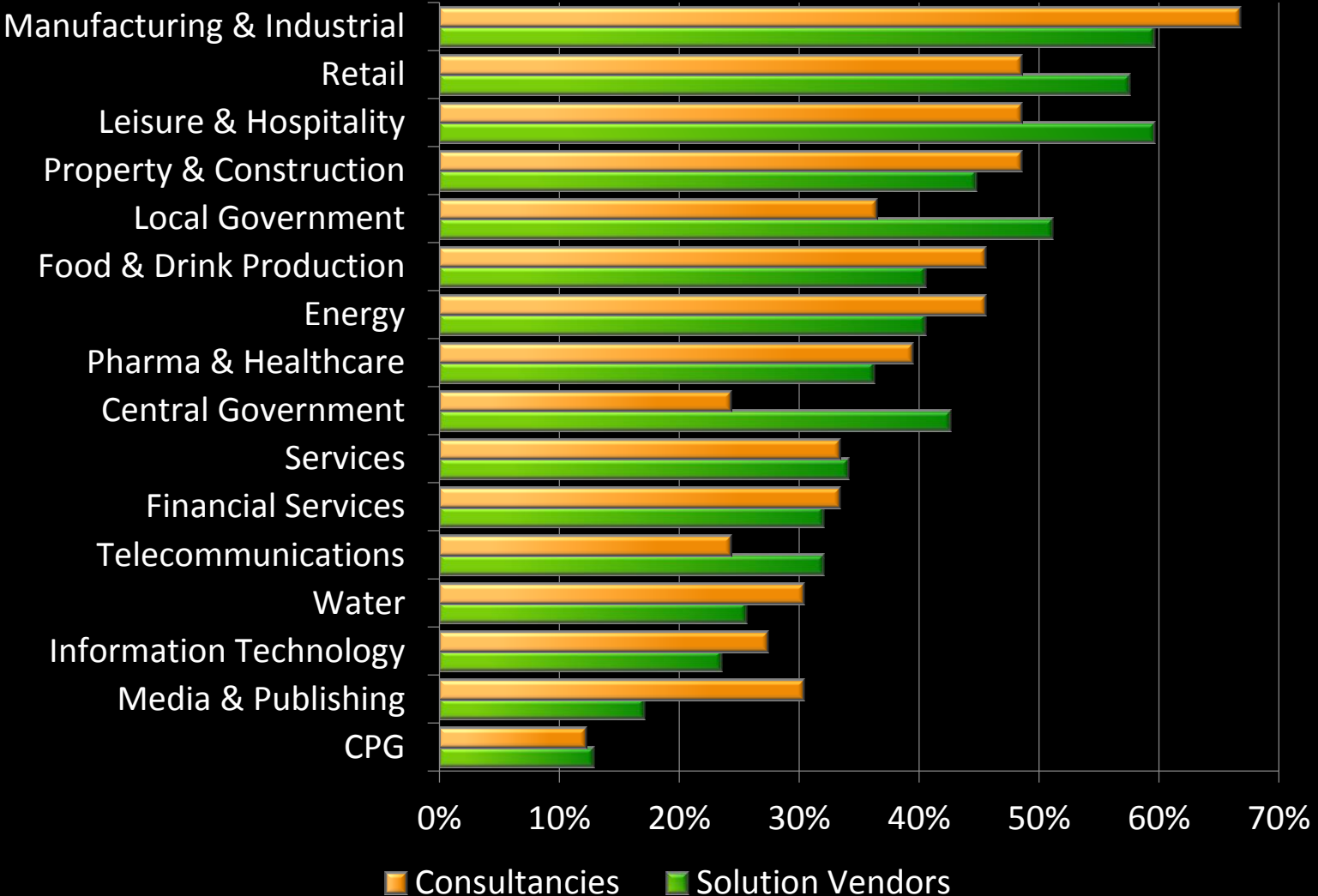


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



Sector Interest – Primary vs. Secondary Wave

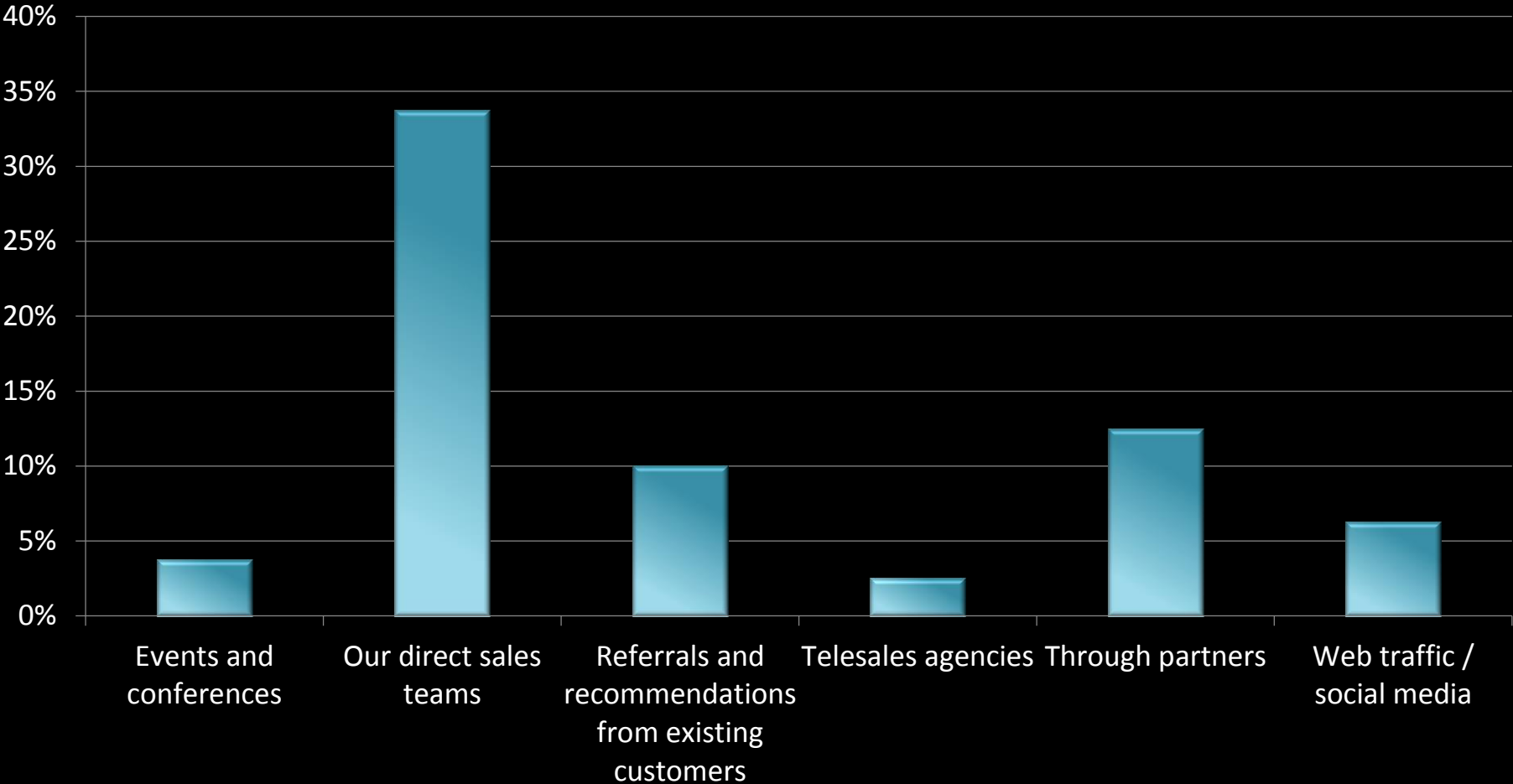


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



How do you get your leads

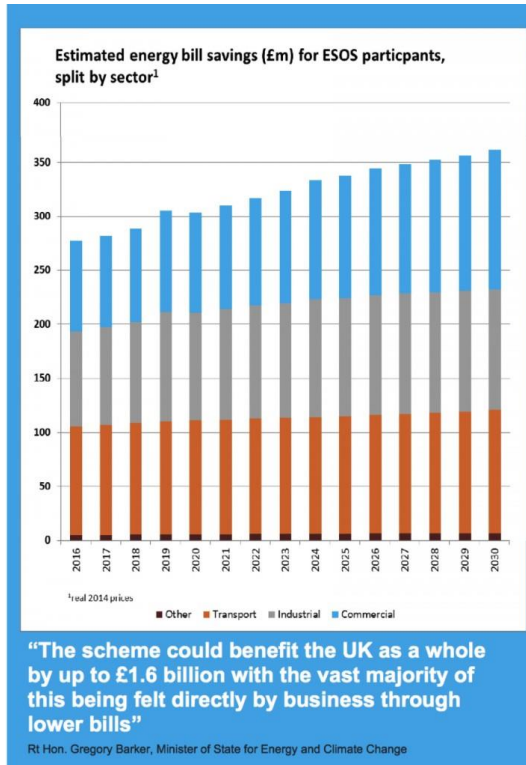


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



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?

Finding ESOS prospects prepared to invest



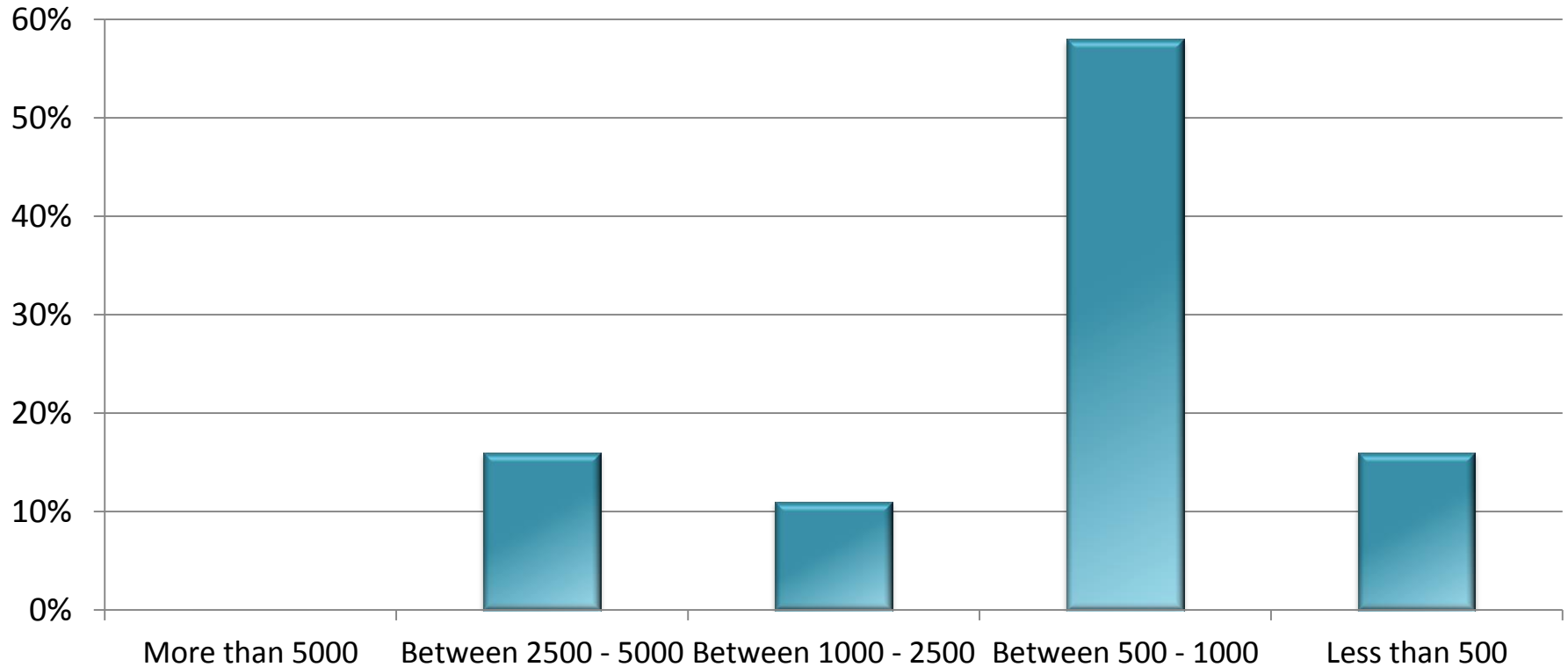
Average Home Gate

10,234

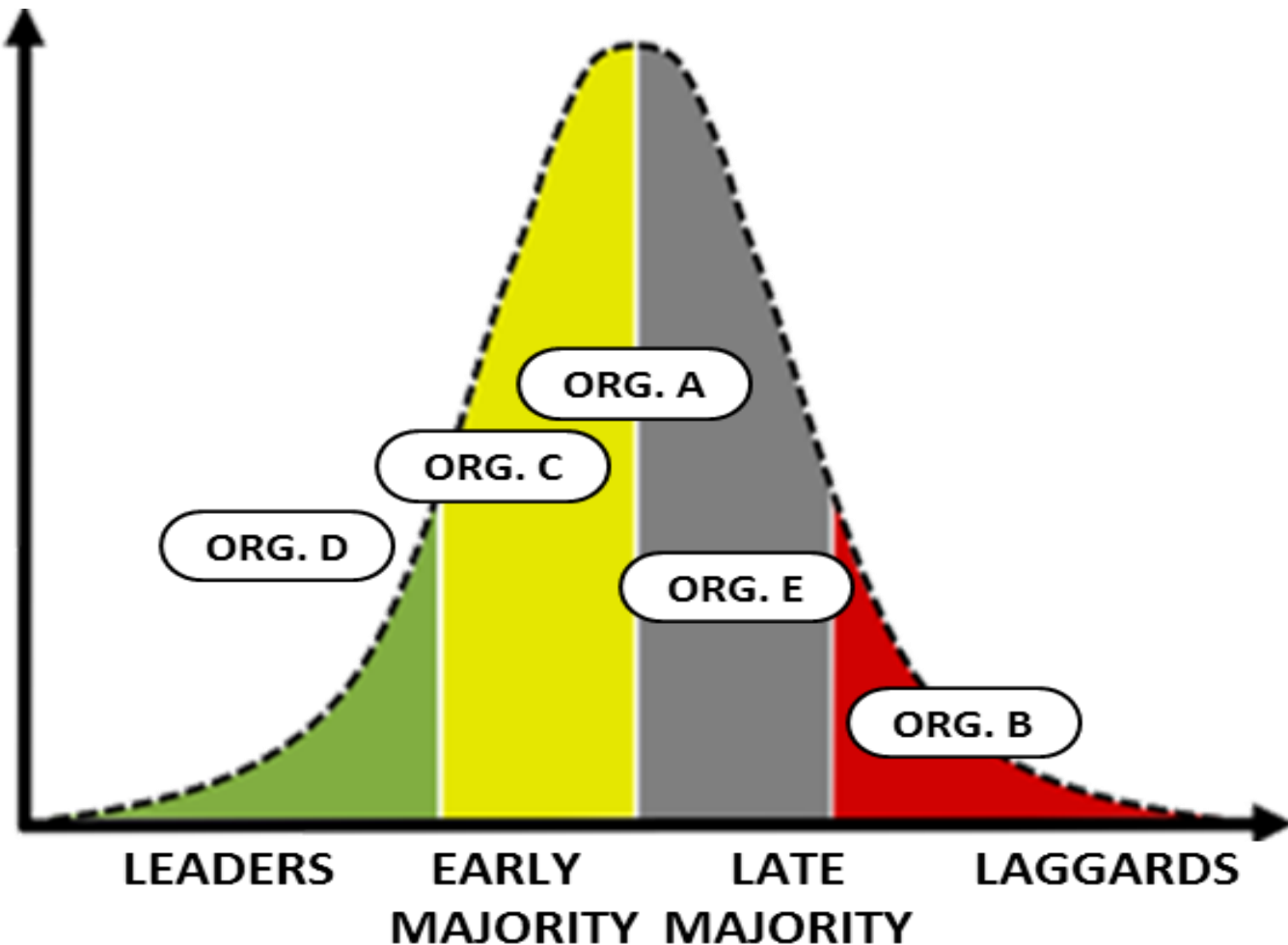
How big will the ESOS market be – Webinar poll



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



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?

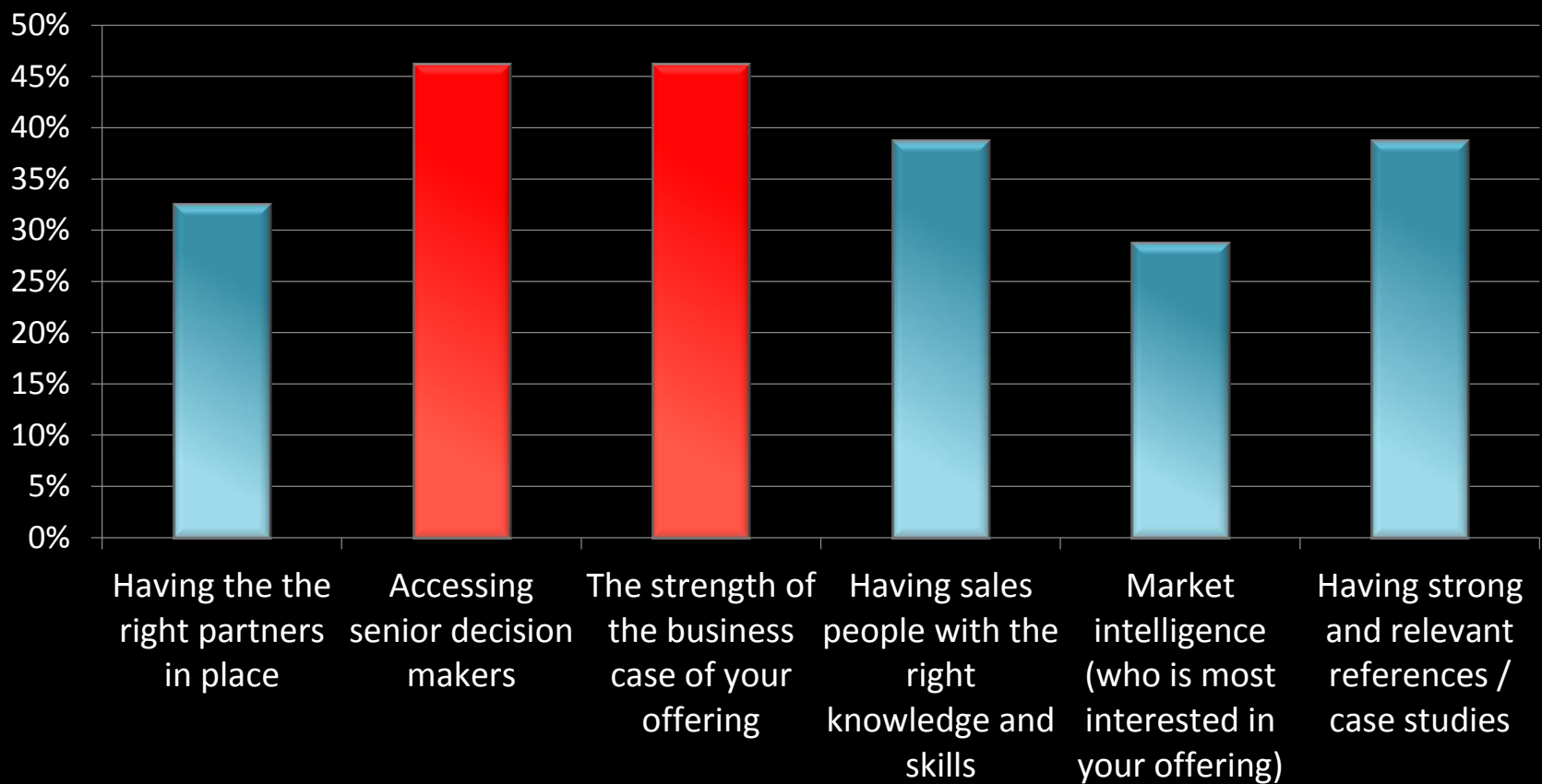


THE ESOS SUPPLIER SURVEY KEY FINDINGS

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 *



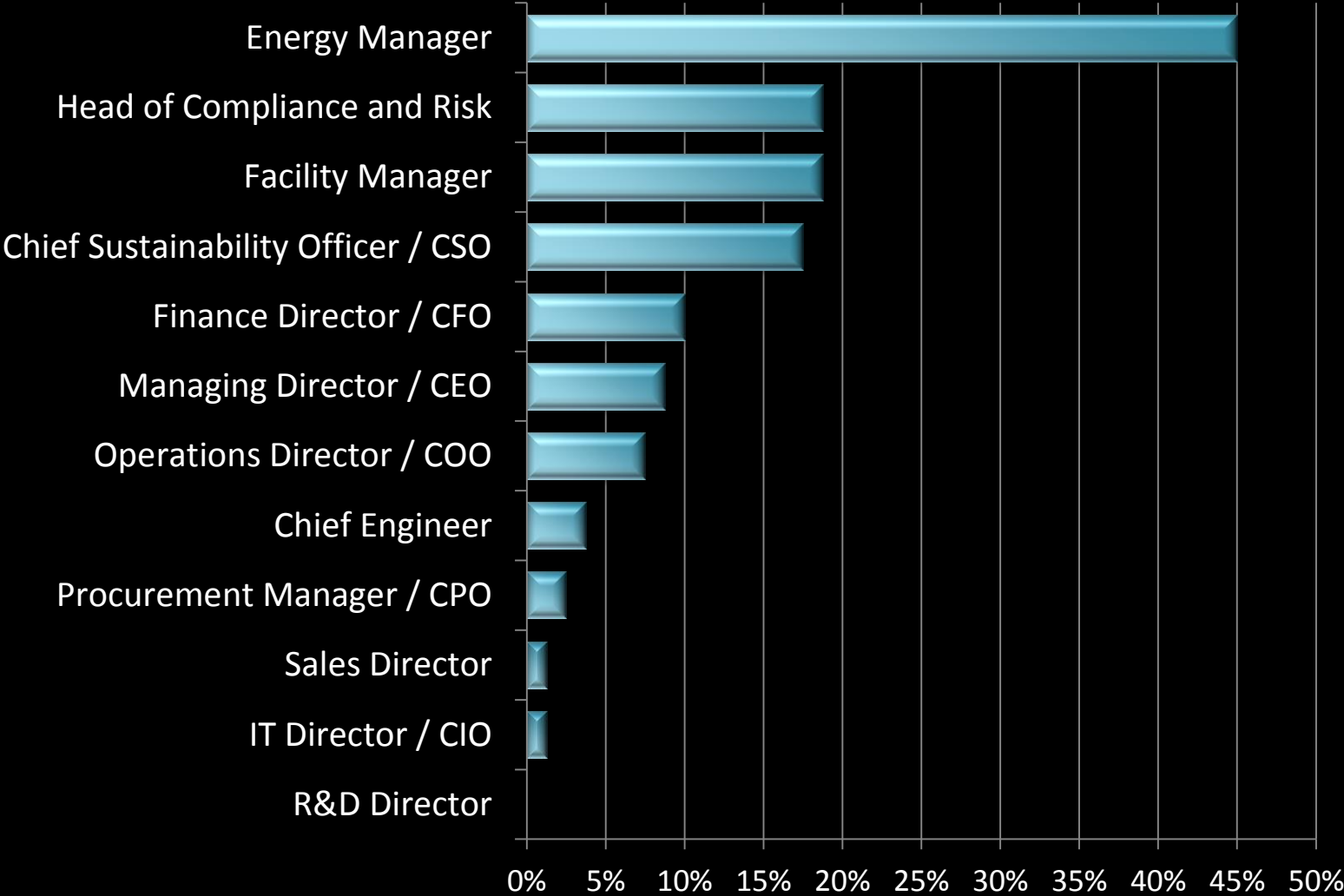
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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

The C-Suite Inside Large Businesses Are Interested in ESOS



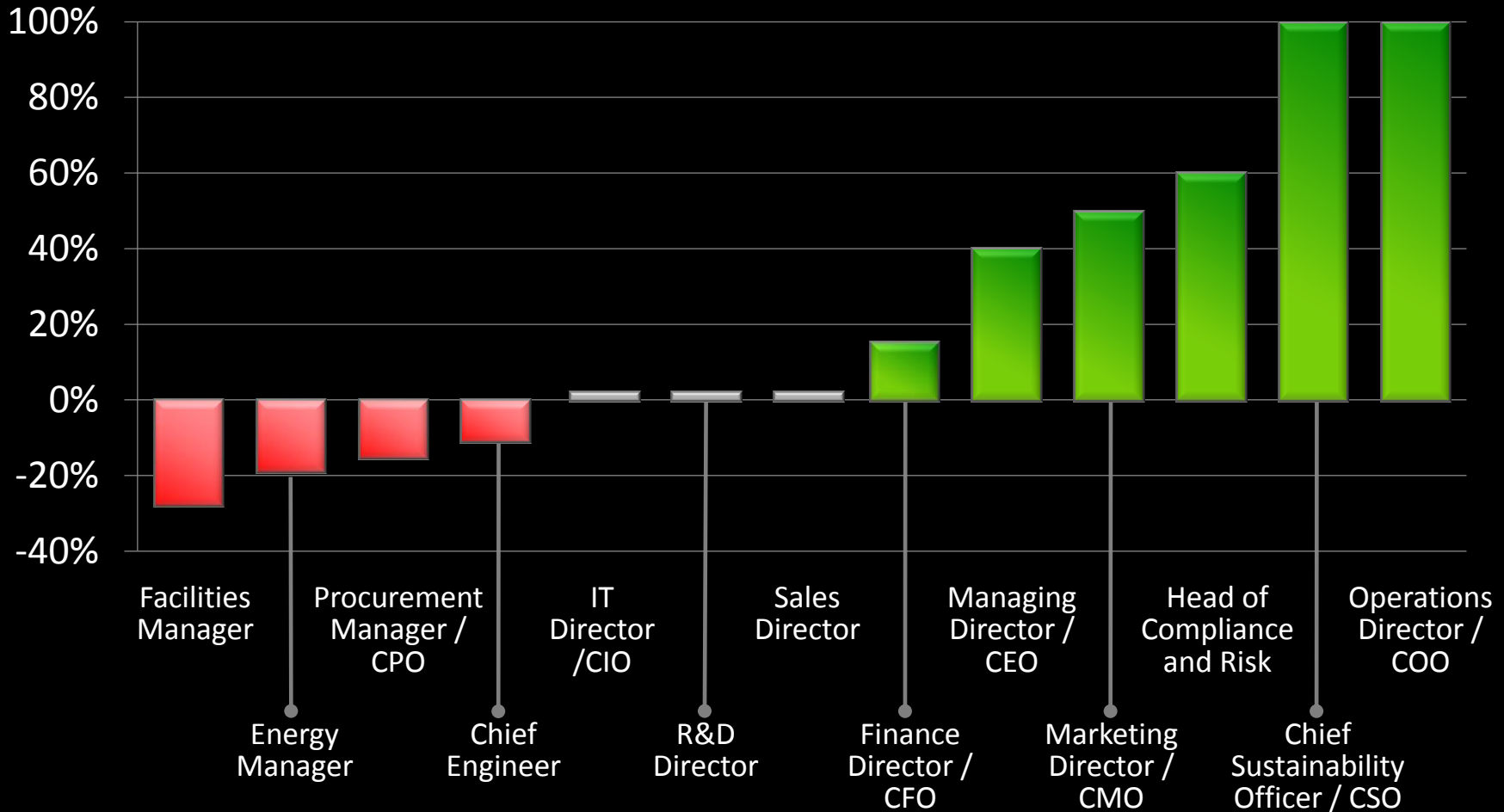
Which Roles are interested in ESOS



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

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

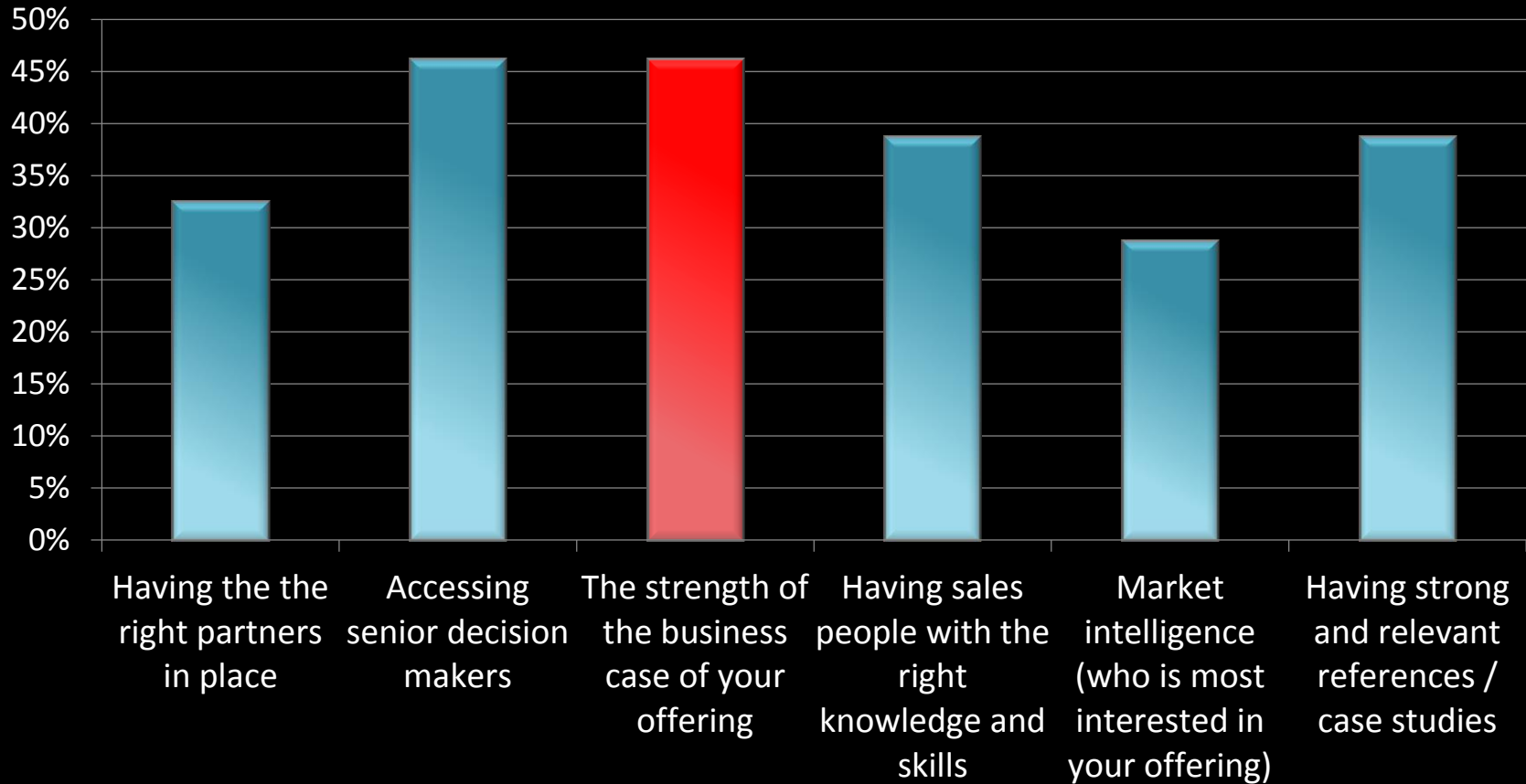


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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)



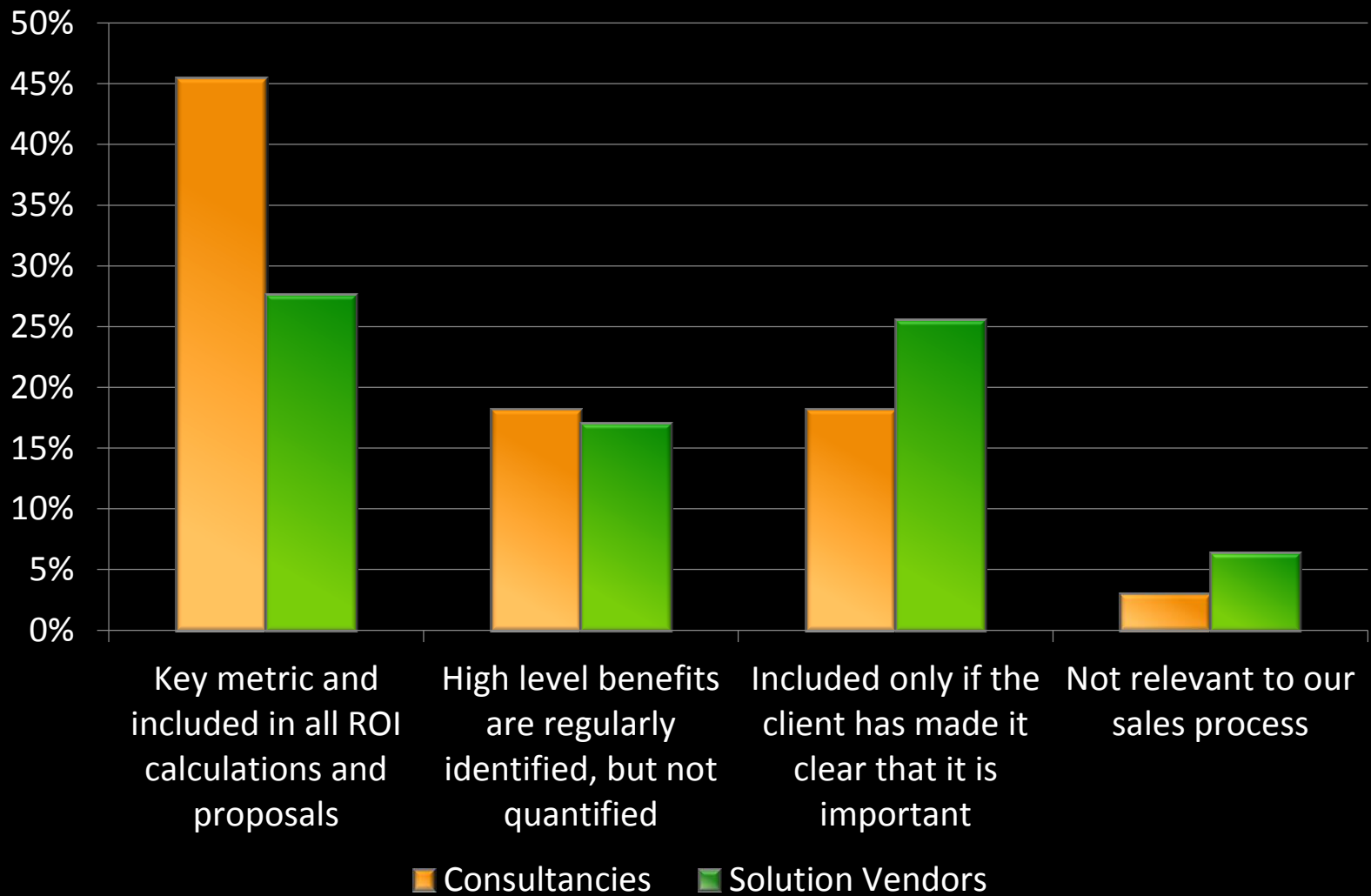
Key Factors for success in the ESOS market *



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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](#)

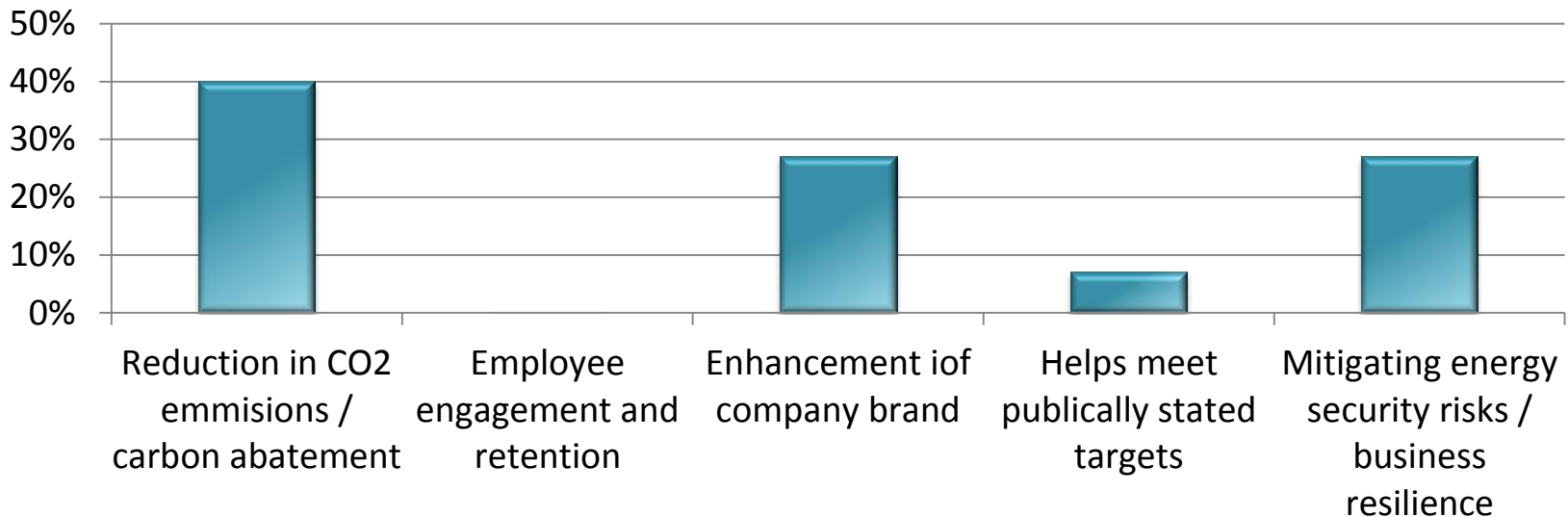
The C-Suite Inside Large Businesses Are Interested in ESOS



Partnering Requirements – Webinar poll



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



ESOS will grow into a bigger Sustainability opportunity



Client C-Suite Interest In ESOS



Progress Towards Sustainable Business Goals

What's your client's view of these RISKS?

**Client View
of
Business
Risk**



Energy Security



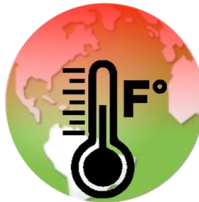
Energy Demand & Costs



Population Growth



Consumer Demand



Climate Change



Investor Pressures



Millennials Influence



Government Policy



Carbon Price

**Rising
Sustainability
Pressures
on
Businesses**

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



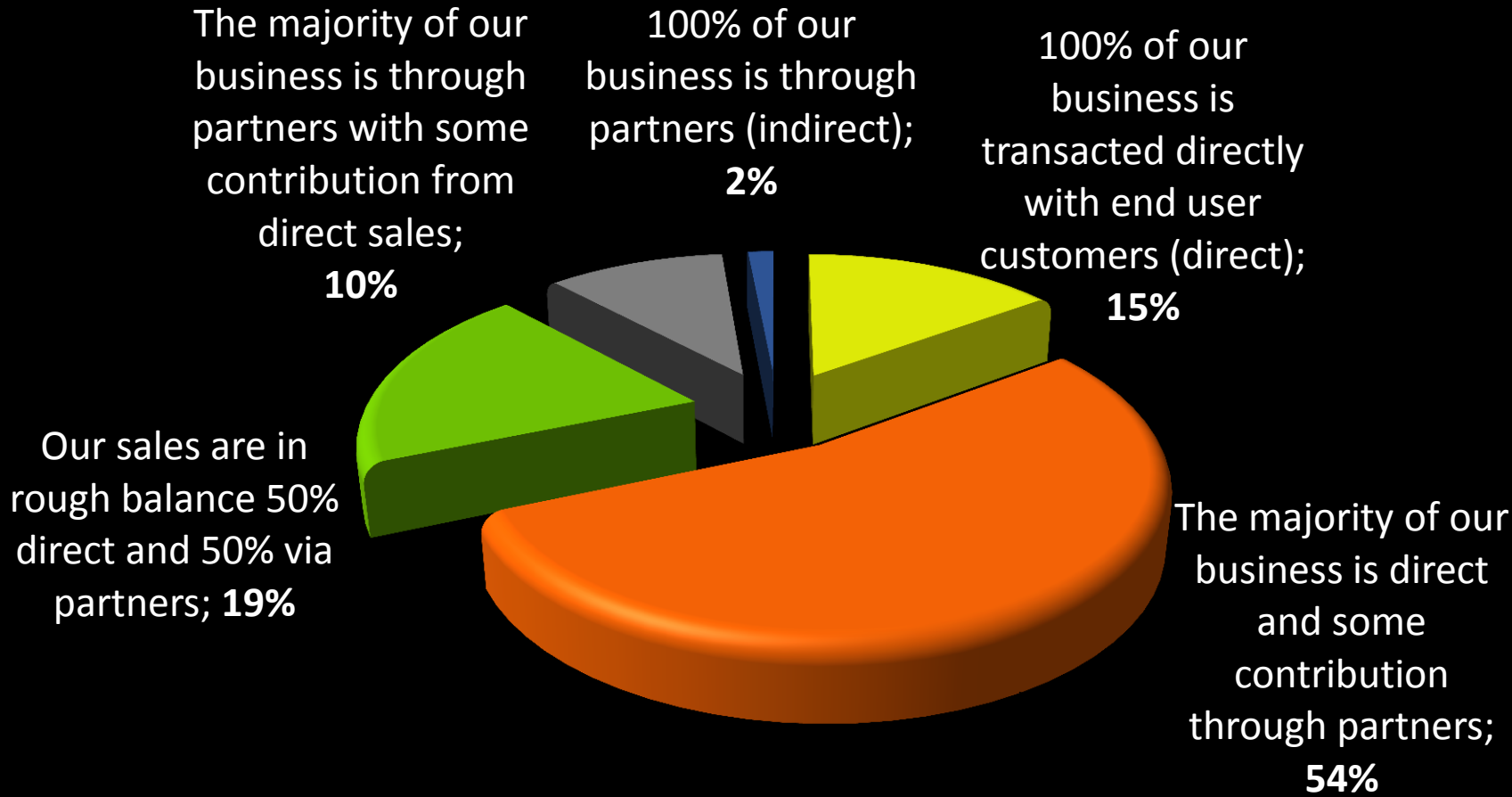
Key Factors for success in the ESOS market *



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

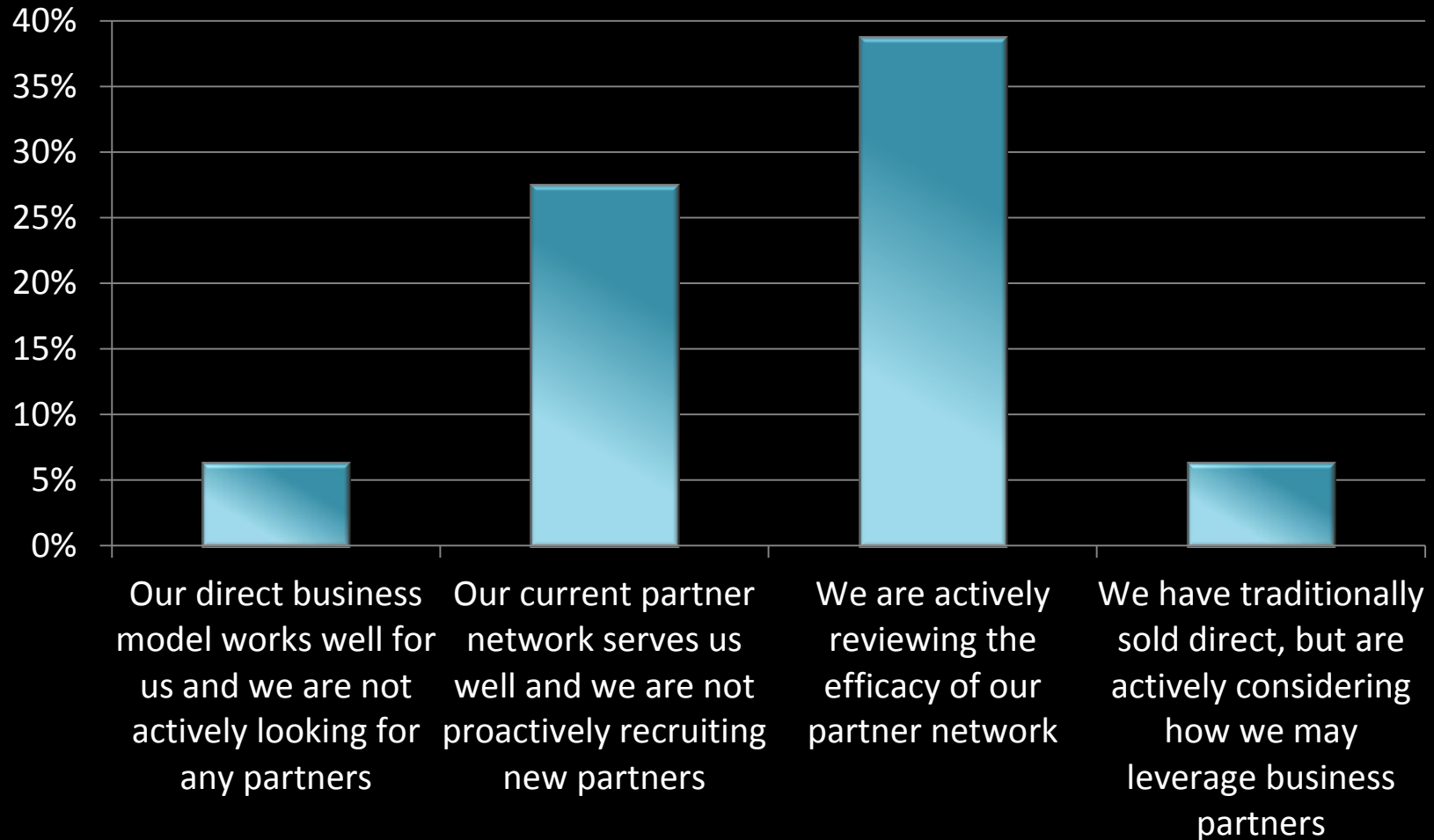
Breakdown of Partnering Activities



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

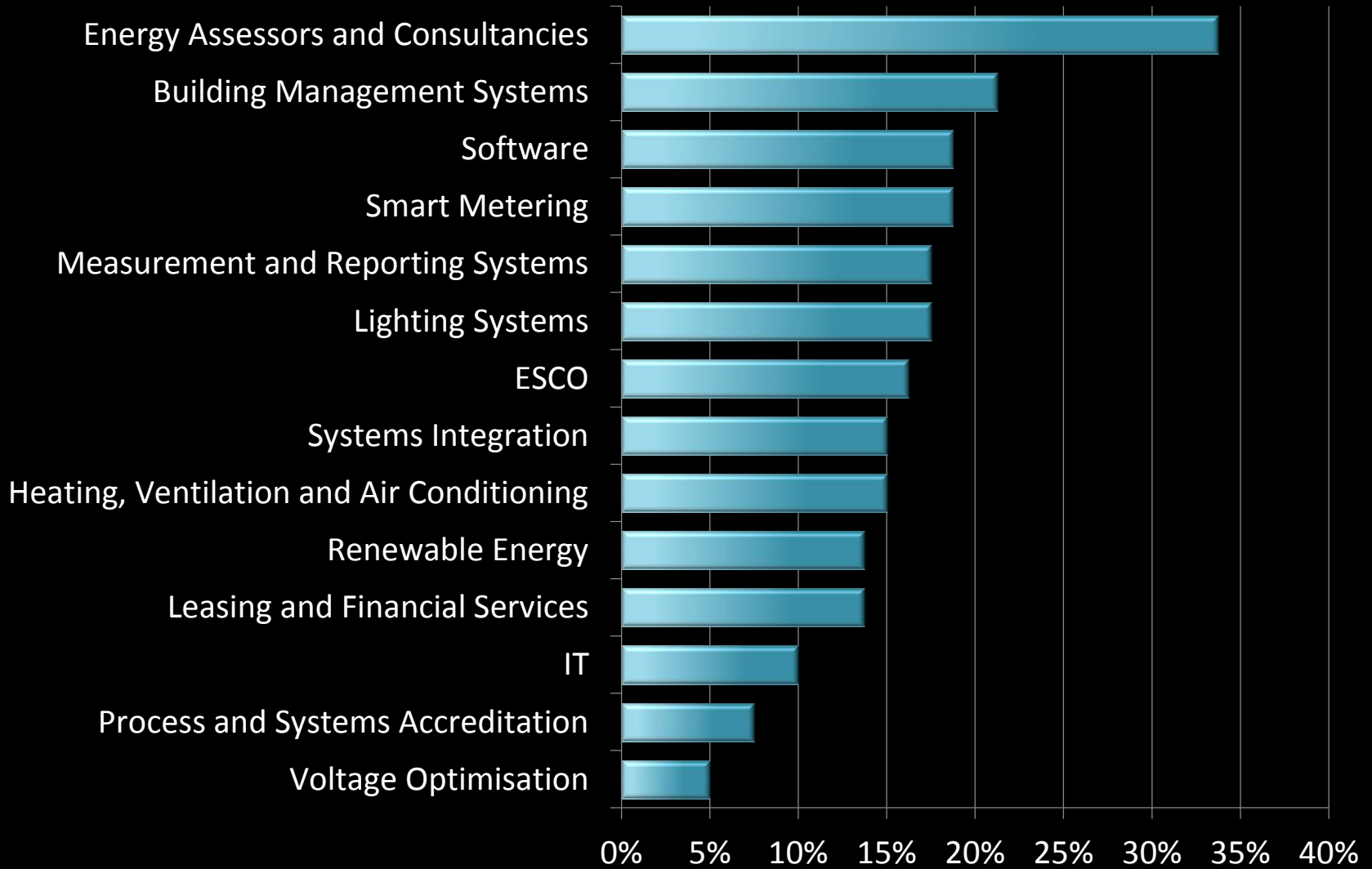
Partner Readiness



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

Partnering Activity – who is looking for who



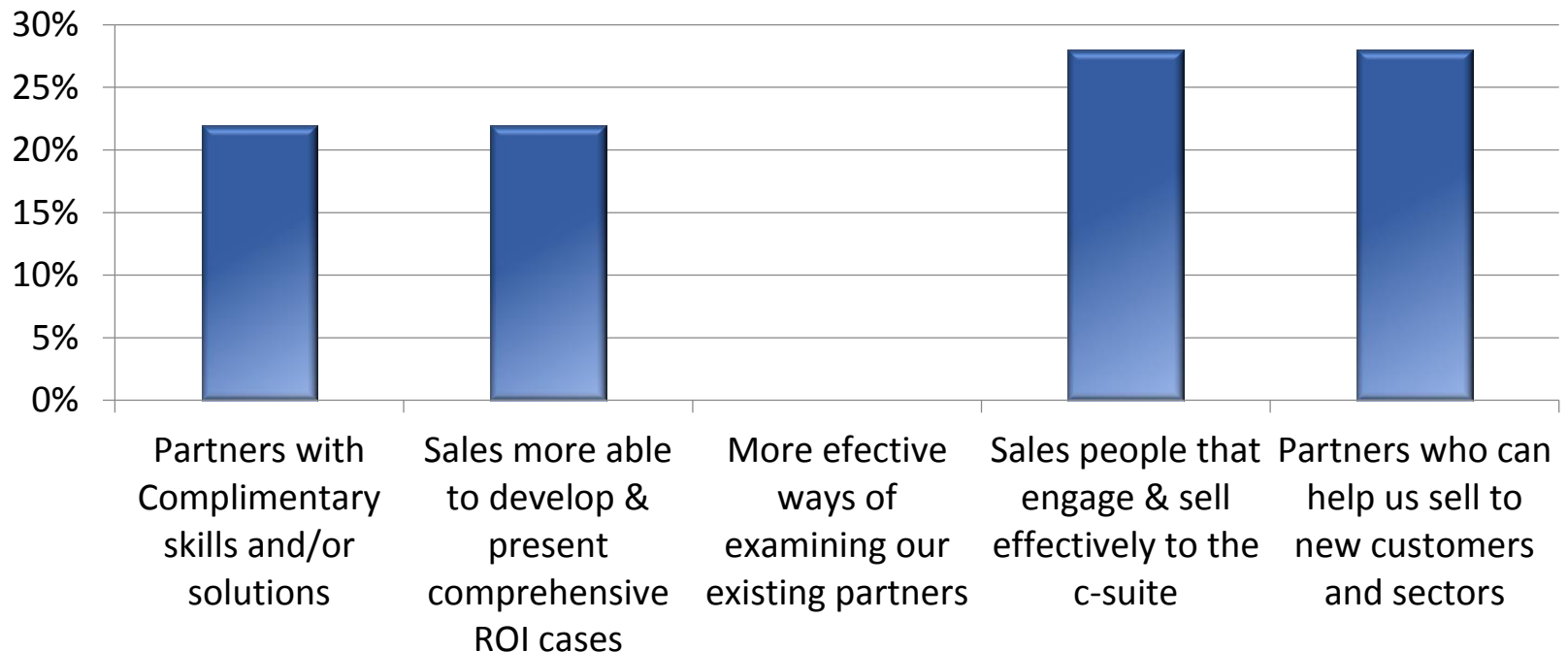
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SOURCE – [CAMBIUM ESOS MARKET RESEARCH 2014](#)

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?**
 1. How will you create a compelling offer supported by a fully quantified business case?
 2. How effective are your sales channels to capitalise on the ESOS Opportunity



What's your client's view of RISK?

**Increasing
Business
Risk**



Energy Security



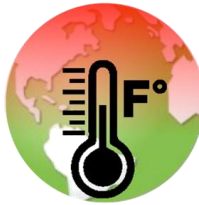
Energy Demand & Costs



Population Growth



Consumer Demand



Climate Change



Investor Pressures



Millennials Influence



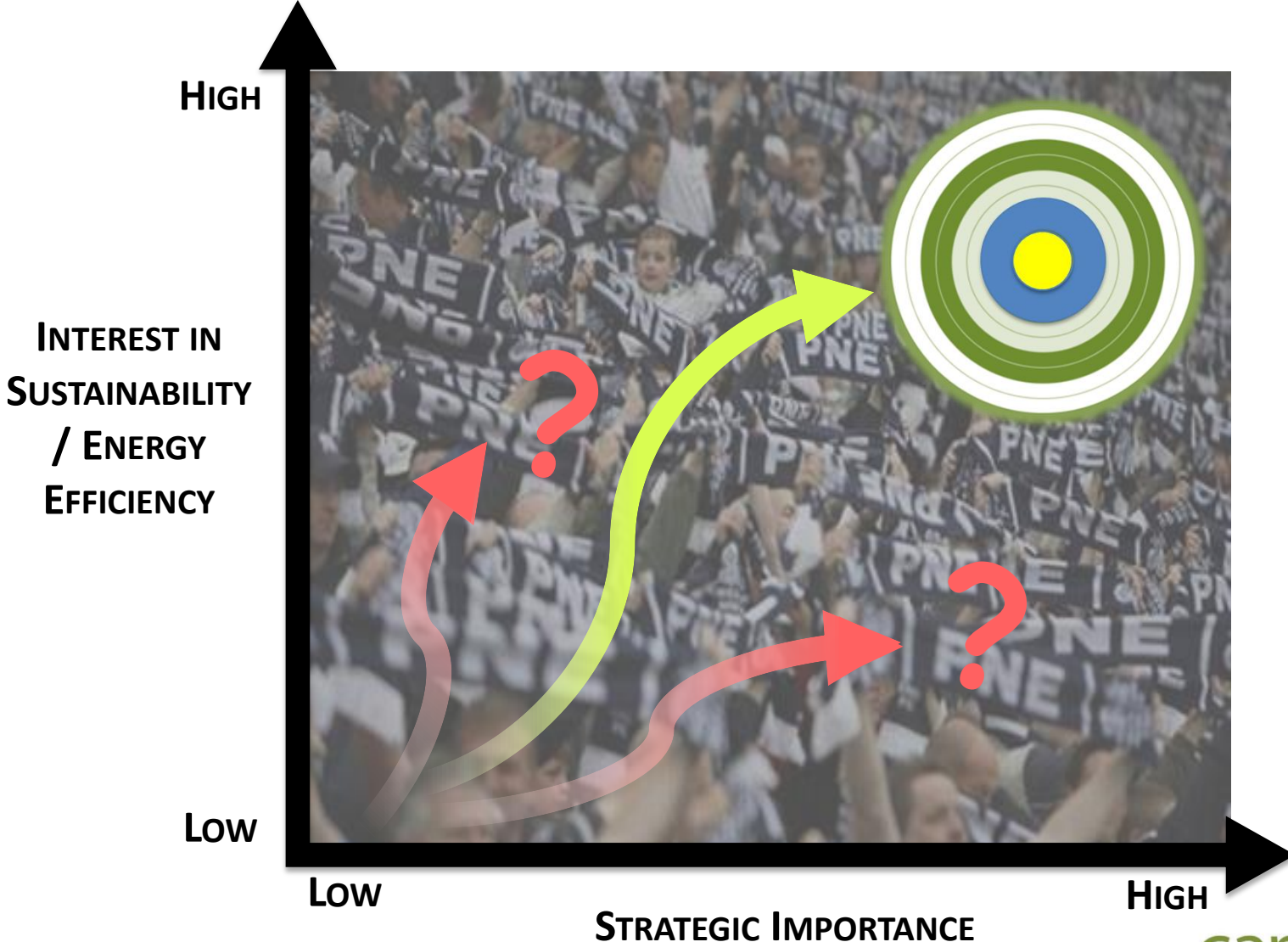
Government Policy



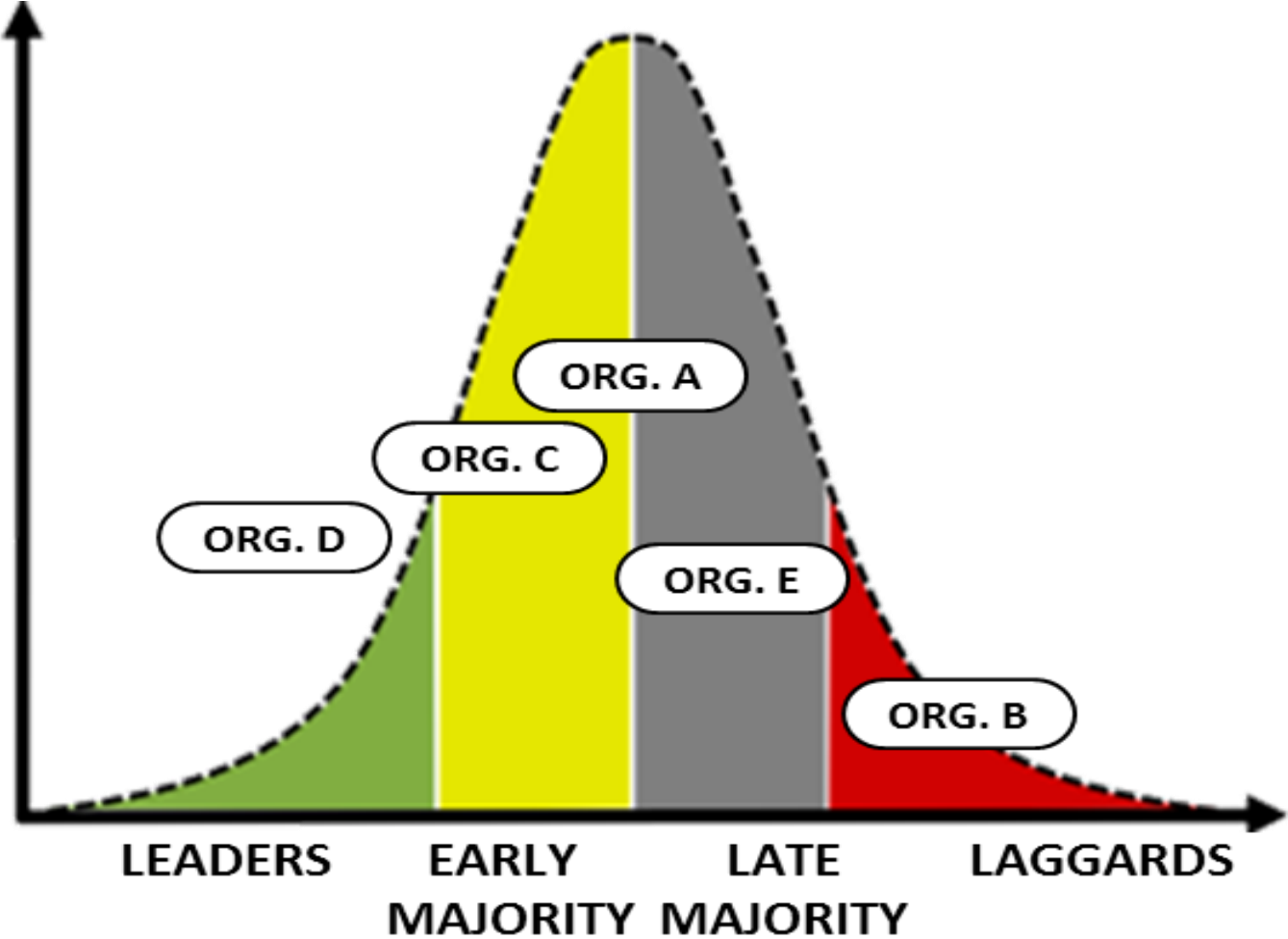
Carbon Price

**Rising
Sustainability
Pressures
on
Businesses**

Finding the best prospects In the ESOS Crowd

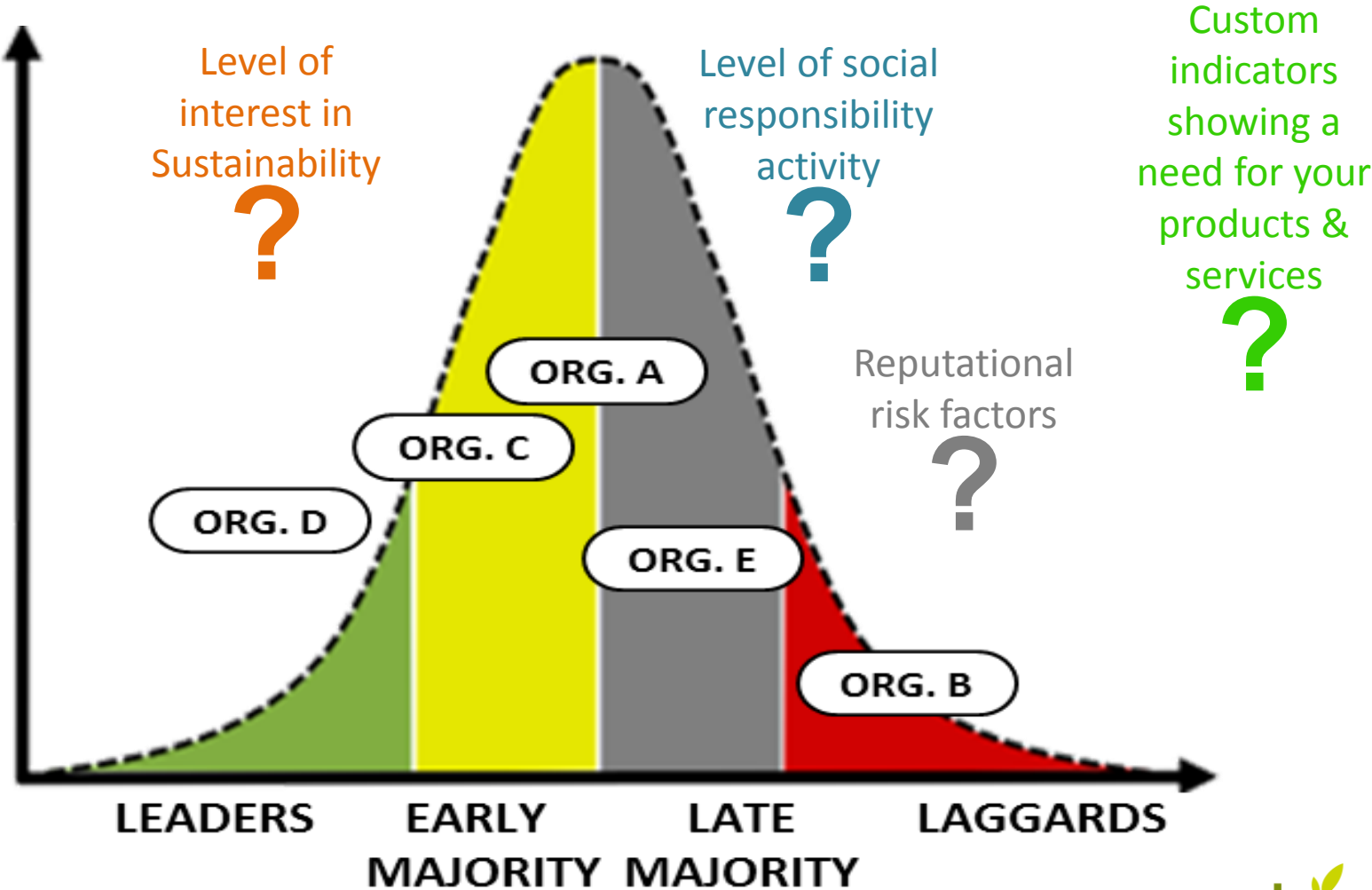


Interest and appetite for action varies by Company



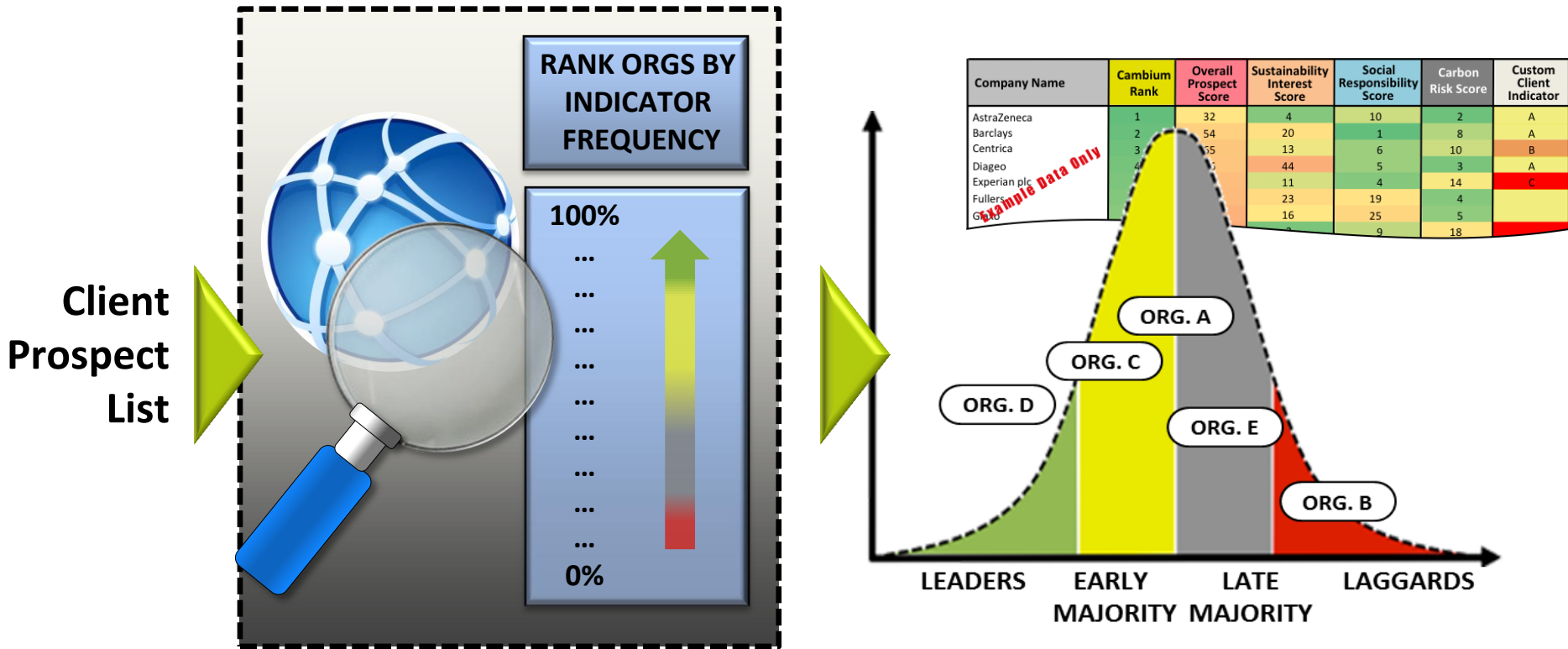
Interest in Sustainability varies by Company

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



How it works

Sustainability Prospector™

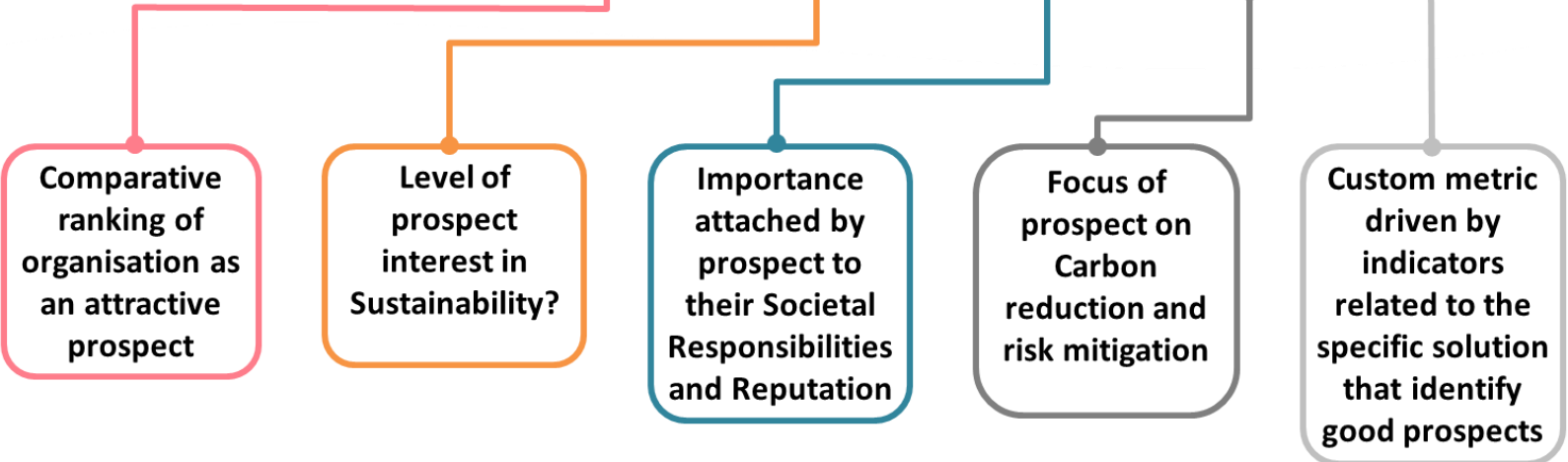


Organisations are categorised in terms of their likelihood to invest in products & services relevant to YOUR OFFERINGS

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	
				9	18	

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?**

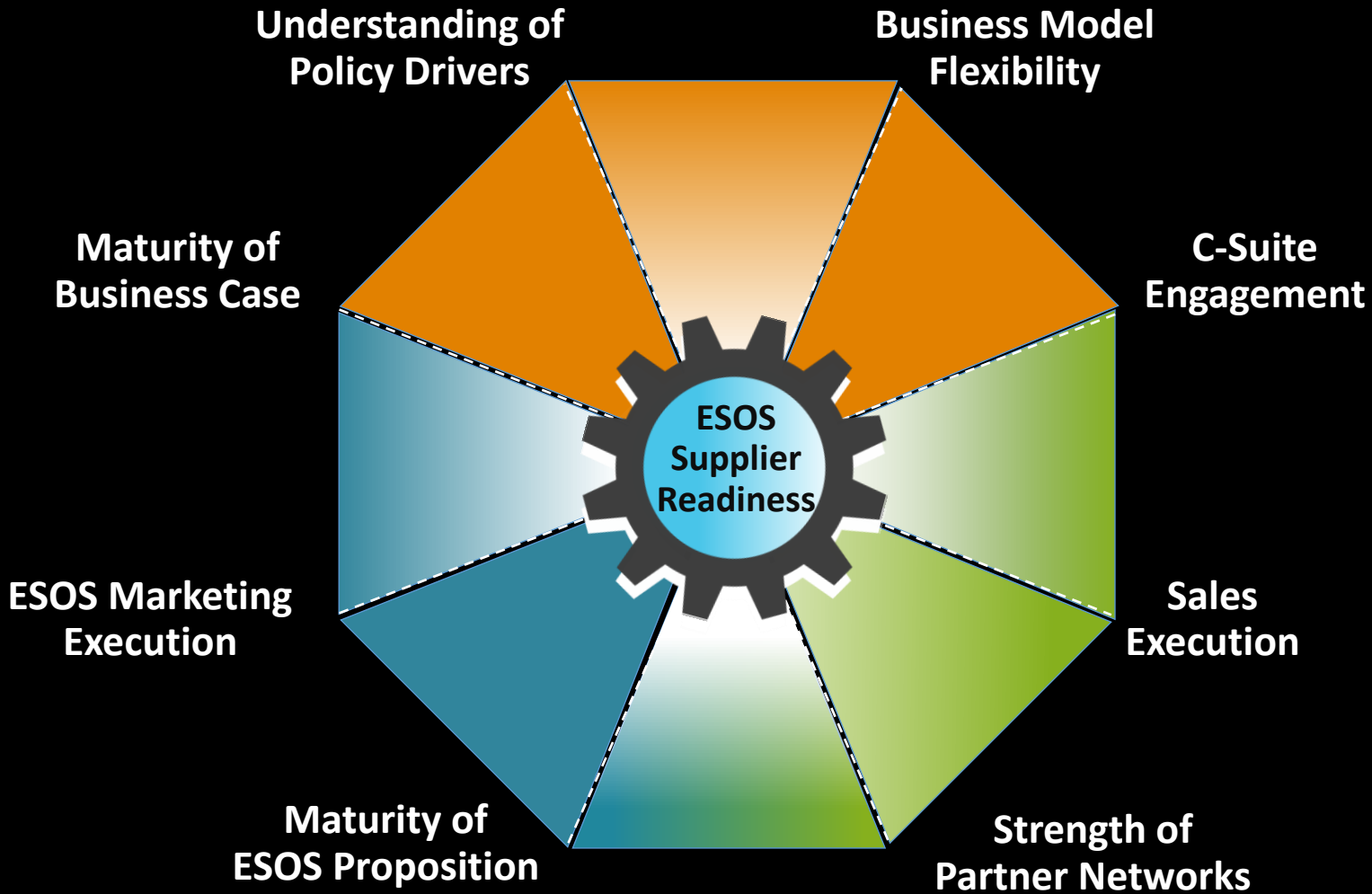
3. How effective are your sales channels to capitalise on the ESOS Opportunity



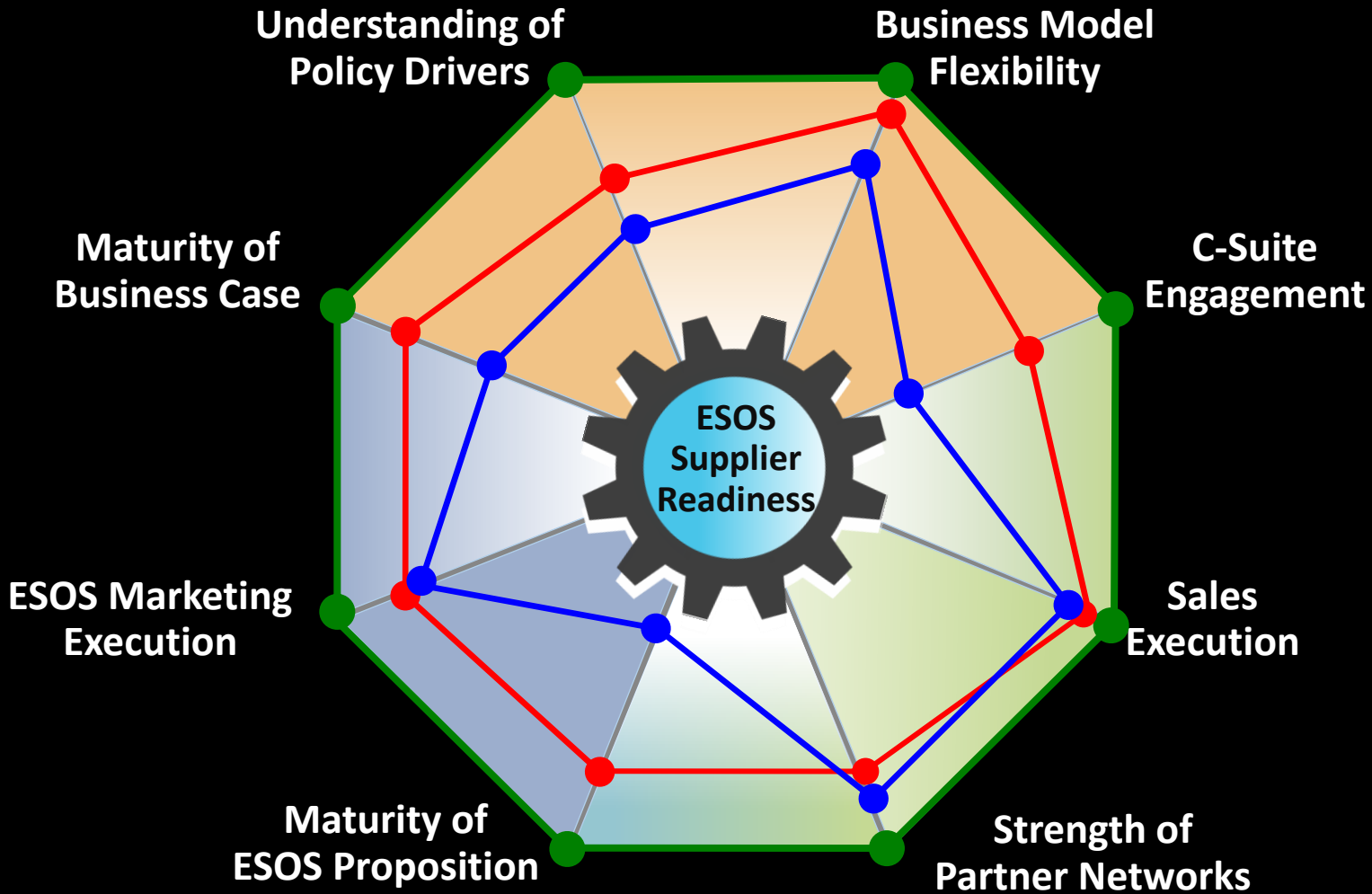
Survey Scope



Survey Scope



Information Available



 **IDEAL PROFILE**

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

 **YOUR PROFILE**

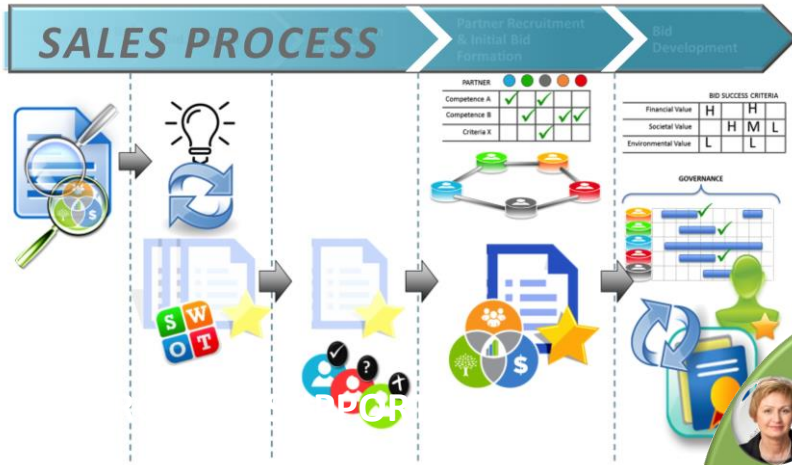


THREE KEY QUESTIONS FOR SUPPLIERS

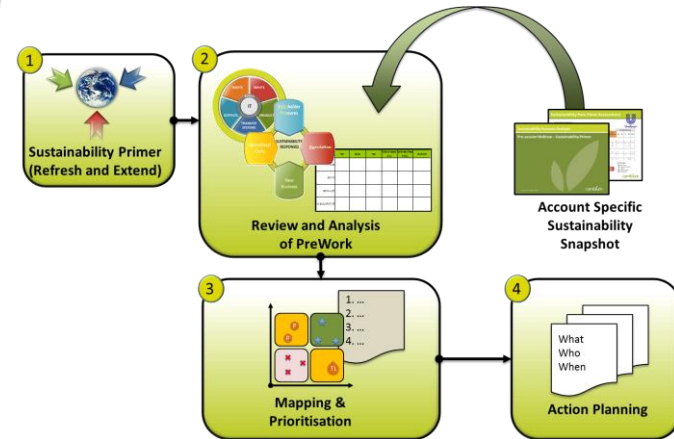
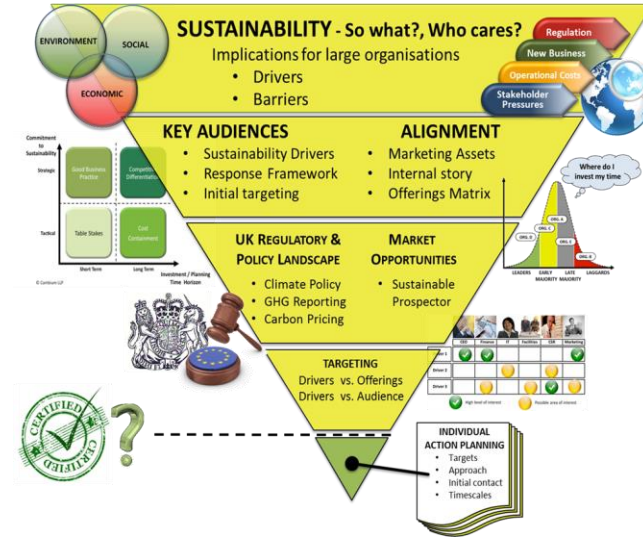
1. Which of the 10,000 Companies affected by ESOS will invest in energy efficiency?
 2. How will you create a compelling offer supported by a fully quantified business case?
- **How effective are your sales channels to capitalise on the ESOS Opportunity**



Direct Sales – Enablement and Planning



SALES ENABLEMENT



KEY CUSTOMER PLANNING



[Find Out More](#)

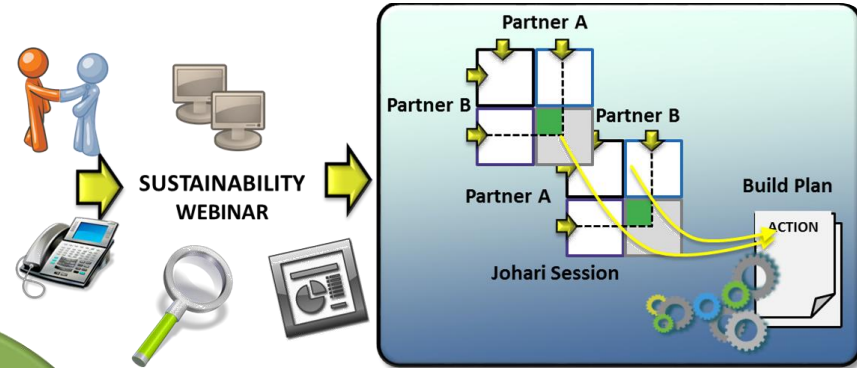
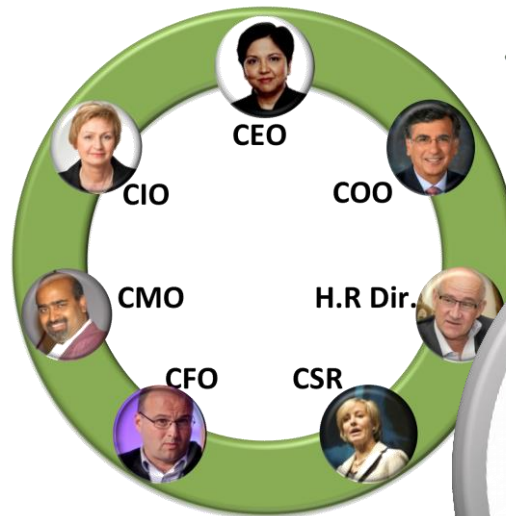
Channels and Partners – Strategy & Development



PARTNER RESEARCH



PARTNER STRATEGY



PARTNER ACCELERATION



[Find Out More](#)

Q. What is This?



A. Titan Arum

Only blooms once every four years

Just like

ESOS

And with it a chance to engage the
C-Suite in your clients

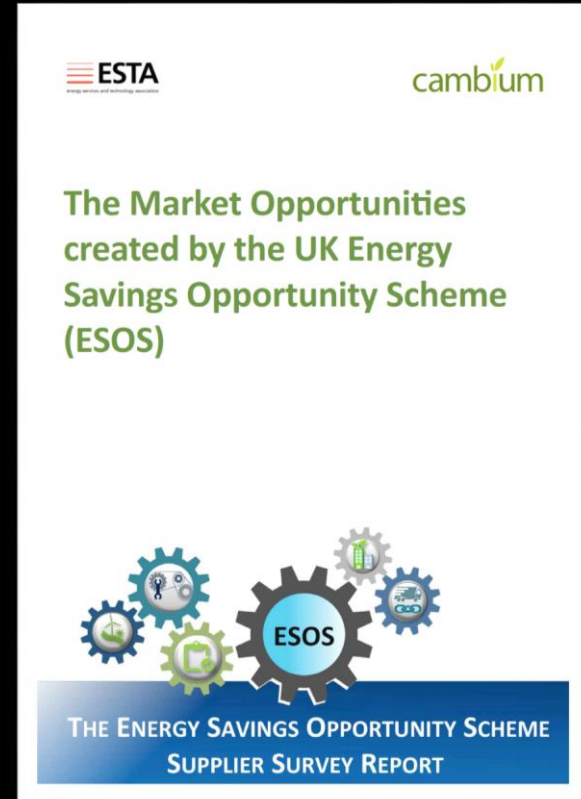
cambium

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](#)

Get In touch for an exploratory discussion



[@cambiumllp](https://twitter.com/cambiumllp)

cambium

info@cambiumllp.com

www.cambiumllp.com