



# **MARKETING IN THE ERA OF COVID-19 & OUR NEW "LOW TOUCH" WORLD—AN UPDATE 5 MONTHS IN**

Peter Troast, Founder & CEO, Energy Circle

Energy Circle Webinar Series

*July 22, 2020*



# Brand Building for Solar: A Video Marketing Case Study



By Cory Allyn | July 22, 2020

Learn more about the effect that modular video marketing can have on your business with this in-depth case study from Energy Circle. Using actual data and metrics from an EC client's recent campaign, we show you how video marketing can be used in a smart, cost-effective way.



Our goal was to take this original 90 second video and use it to reach a larger audience within the target area, build interest and awareness for solar products and solutions in general, and improve brand recall and consideration for our client, specifically.

# Upcoming Webinars

Tuesday 7/21, 3PM eastern

*Special Webinar with Pearl Home Certification: **The Art and Science of Selling Fresh Air*** with Kevin Brenner and Elena Chrimat

Wednesday, 7/29, 5PM eastern

**A Fall Season Like No Other is Upon Us. Are You Ready?**

Wednesday, 8/5, 5PM eastern

**IAQ Monitors: What's Out There and What Are Their Features**  
with Joe Medosch, Hayward Score

Wednesday, 8/12, 5PM eastern

**The Role of Facebook in Your Marketing Mix**  
with Josh Kennon, Energy Circle Director of Marketing Operations

Wednesday, 8/19 and 8/26

**Summer Break**

# What We'll Discuss

- 1 LATEST DATA ON THE NEW LOW TOUCH WORLD**
- 2 COVID ERA HOMEOWNER PERSONAS—PROVING TO BE ACCURATE**
- 3 BIG PICTURE TRENDS**
  - Air Purification Explosion Continues
  - Ventilation Finally Getting Its Due?
  - US Advertising Trends
  - Energy Circle Search Data Insights
- 4 CHECKLIST: ACTIONS YOU CAN TAKE NOW**





**LOW TOUCH WORLD:  
YES, IT'S HERE TO STAY**

# Homeowners Forever Changed?

## The New York Times

RIGHT AT HOME

### Telemedicine for Home Repairs?

The coronavirus has made homeowners wary of inviting workers into their homes, but some contractors can make a diagnosis virtually.



May 29, 2020

# Digital/Low Touch Here to Stay

## © Consumer changes to digital and low-touch activities fall into three primary buckets



User growth since COVID-19 <sup>2</sup>	High (>40%)	<p><b>Works for now</b></p> <p>Activities necessitated by COVID-19 that are poor substitutes for in-person counterparts, and consequently have lower intent to continue</p>	<p><b>Accelerated shifts</b></p> <p>Satisfactory digital replacements for in-person activities and connectivity, with growing adoption</p>
	Low (<40%)		<p><b>Potentially here to stay</b></p> <p>New and familiar forms of entertainment and interaction with medium-high intent to continue</p>
		Low (<45%)	Medium-high (>45%)
<p><b>Intent to use after COVID-19<sup>1</sup></b></p> <p><i>Percent of new or increased users who intend to keep doing activity after COVID-19</i></p>			

- **User growth** is defined as the percent of respondents who replied that they are **new users** over the percent of respondents who replied that they were **using this service pre-COVID-19**
- **Intent to continue** is defined as the percent of respondents who replied that, after COVID-19, they will **keep their usage at the same level or will increase usage**

<sup>1</sup> Q: Compared to now, will you do or use the following more, less or not at all, once the coronavirus (COVID-19) situation has subsided? Possible answers: "will stop this"; "will reduce this"; "will keep doing what I am doing now"; "will increase this."

<sup>2</sup> User growth is calculated as % of respondents who replied that they are new users over % of respondents who replied that they were either: increased usage users, same usage users, or reduced usage users.

Source: McKinsey & Company COVID-19 US Consumer Pulse Survey 4/20-4/26/2020, n = 1,052, sampled and weighted to match US general population 18+ years



# McKinsey's Five Big Changes (Mid June)

## COVID-19 has affected consumer behavior in five key ways, many of which will have a lasting impact



### Shift to value and essentials

- More than 50 percent of Americans believe it will take longer than 6+ months for the economy to recover, and that the crisis will continue to impact them for another 4+ months
- This sentiment has made consumers evaluate what they are spending on and where more carefully
- Spending on essentials is the only category with positive intent even as many categories are beginning to rebound since March



### Flight to digital and omnichannel

- Most categories have seen 15–30% growth in consumers shopping online and most of those consumers say they will continue after the crisis
- Many digital and low-contact services (e.g., delivery, self-checkout) have also seen an increase



### Shock to loyalty

- As consumers struggle with limited access, brand loyalties are being challenged, and 75% of consumers have tried different stores, websites, or brands through the crisis
- More than 70% of consumers who made these changes expect to integrate these places to shop and brands in their post-COVID-19 life



### Health and “caring” economy

- Consumers are actively looking for safety measures when deciding where to shop in-store such as enhanced cleaning, masks, and barriers
- Companies' actions in this time (e.g., showing care for employees) will be remembered for a long time and can lead to goodwill



### Homebody economy

- Even as many regions reopen, more than 50% of consumers are waiting for milestones beyond lifting restrictions to return to out-of-home activities
- Many consumers have found at-home solutions to regular out-of-home activities and >50 percent intend to continue some habits post-crisis

McKinsey & Company 1

McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15-6/21. n=2006

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Efficiency, Conservation



### Flight to digital and omnichannel

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- Many digital and low-contact services (e.g., delivery, self-checkout) have also seen an increase

Online Interactions



### Shock to loyalty

- As consumers struggle with limited access, brand loyalties are being challenged, and
- More than 70% of consumers who made these changes expect to integrate these pla

Strong Companies Win



### Health and “caring” economy

- Consumers are actively looking for safety measures when deciding
- Companies' actions in this time (e.g., showing care for employees)

Protocols, Employee Safety, Empathy



### Homebody economy

- Even as many regions reopen, more than 50% of consumers are waiting for milestones
- Many consumers have found at-home solutions to regular out-of-home activities and >5

Embracing the Home

McKinsey & Company 1

McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15-6/21. n=2006

# We Can Learn from Shopping Priorities

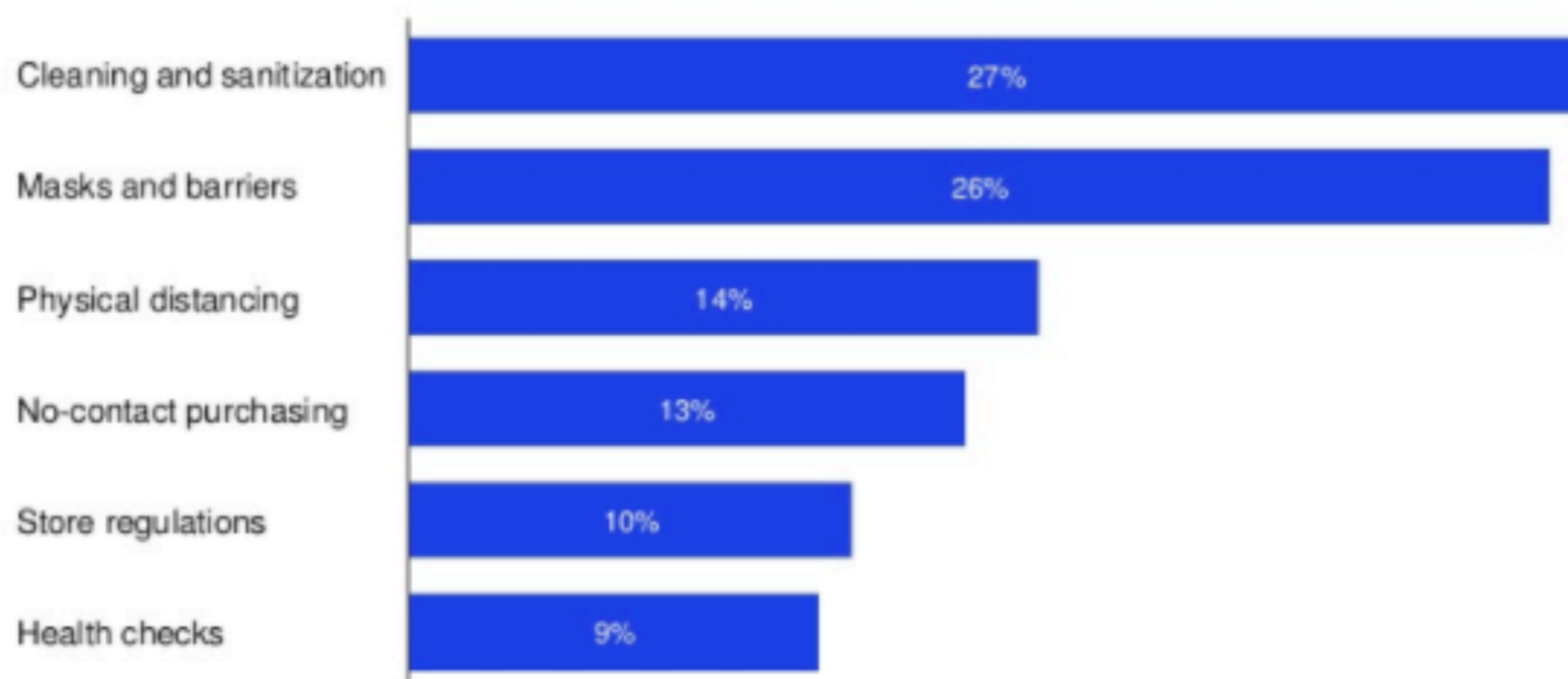
Health and "caring" economy



## Cleaning and the use of masks and physical barriers are most important to consumers as they decide where to shop in-store

### Top priorities when deciding where to shop in-store<sup>1</sup>

% of respondents for whom this criterion is the most important<sup>2</sup>



<sup>1</sup> Q: Once restrictions lift, which of the following factors will be most important to you as you decide which of these places to visit in person? Respondents were asked to select the most important.

<sup>2</sup> The following categories are included in each bucket: Cleaning and sanitization—increased cleaning, improved air filtration, availability of sanitizing supplies throughout the store; Health checks—customer wellness check (e.g., temperature) on entry, employees' wellness check (e.g., temperature) on entry; Masks and barriers—customers and employees wear masks, customers and employees provided masks and gloves, plastic barrier with cashier; No-contact purchasing—curbside pick-up, cashier-less checkout, no contact delivery, buy online for pickup in store; Physical distancing—customer number limit, distancing in customer line, reduced employee activity during shopping hours; Store regulations—no customer product testing, one-way store aisles, special hours for high-risk shoppers.

Source: McKinsey & Company COVID-19 the US Consumer Pulse Survey 6/15-6/21/2020, n = 2,006, sampled and weighted to match the US general population 18+ years

McKinsey & Company 19

McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15-6/21. n=2006



# The Health and “Caring” Economy

Health and “caring” economy



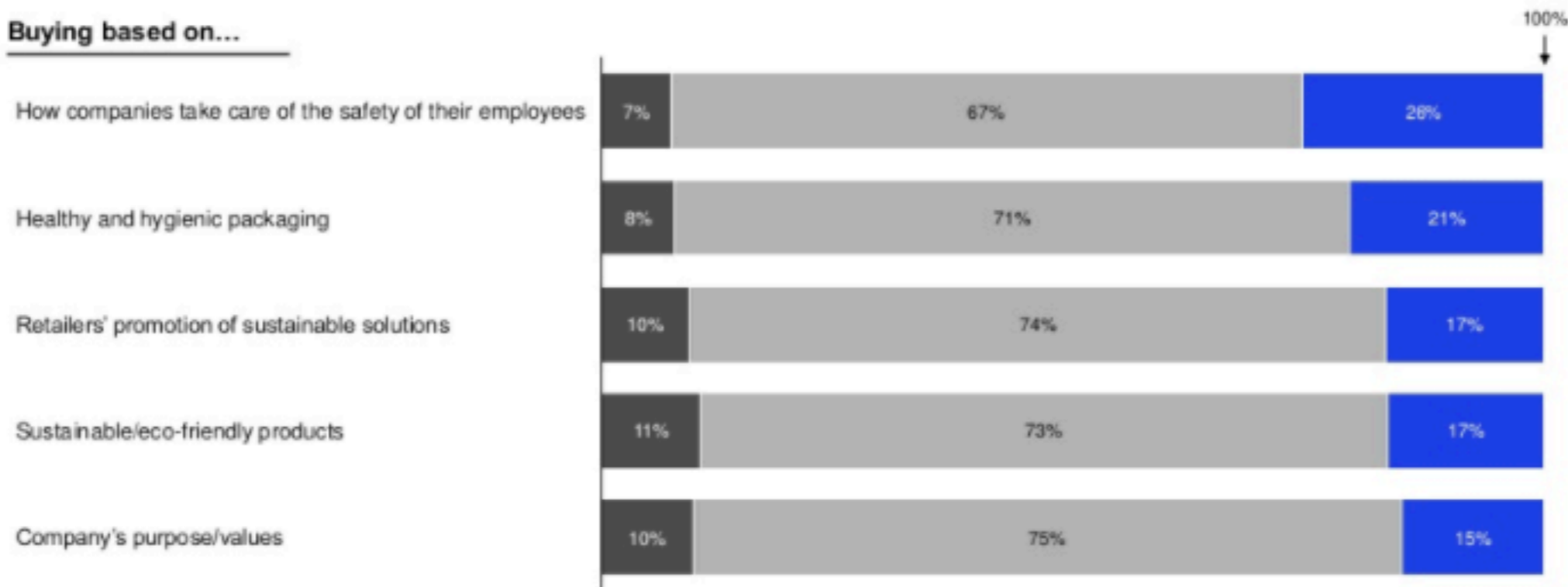
## Consumers are paying increased attention to how a company treats its employees

Which best describes how often you are doing each of the following items<sup>1</sup>

■ Doing less ■ Doing about the same ■ Doing more

% of respondents

### Buying based on...



<sup>1</sup> Q: Which best describes how often you are doing each of the following items? Possible answers: "doing less since coronavirus started"; "doing about the same since coronavirus started"; "doing more since coronavirus started." Figures may not sum to 100% because of rounding.

Source: McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15–6/21/2020, n = 2,006, sampled and weighted to match the US general population 18+ years

McKinsey & Company 20

McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15-6/21. n=2006

# Bottom Line Positive?

## **Lower Touch**

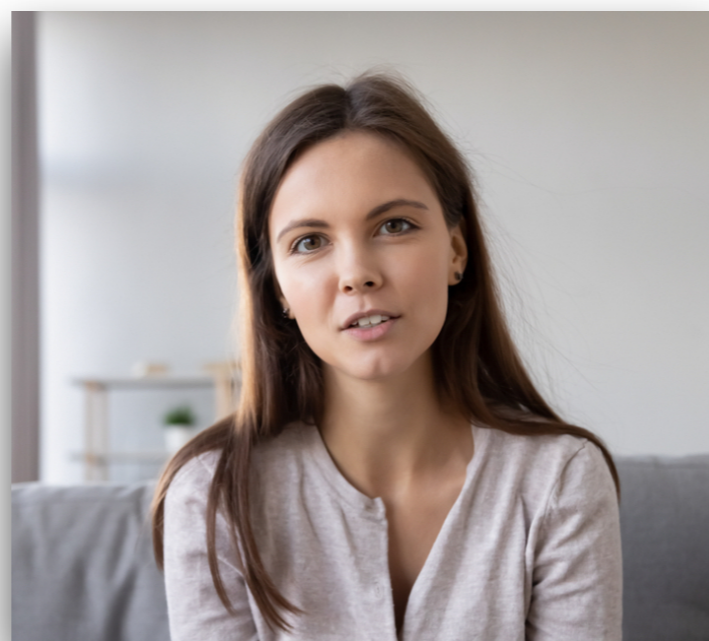
## **Lower Cost**

# The New COVID-era Homeowner Personas



## C'mon in Jim

Unperturbed  
No outward signs of concern



## Cautious Kristina

Expects new protocols  
Respects overcommunication  
Will put you to the test



## Hell No Helen

Nothing is important enough to let you in my house



# **OTHER BIG PICTURE TRENDS**

# 2020 Year to Date

● covid cleaning  
Search term

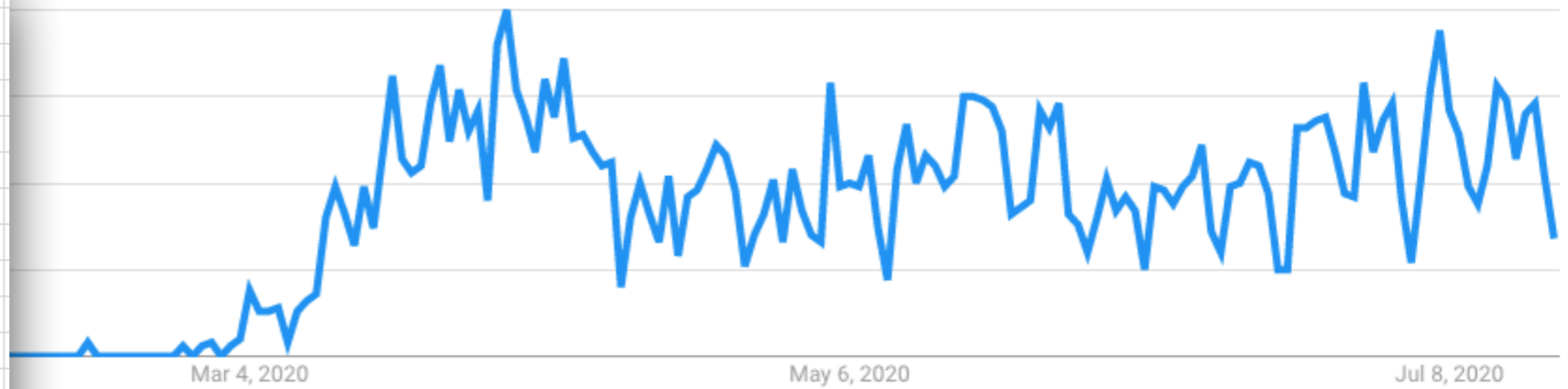
+ Compare

United States 1/1/20 - 7/21/20 All categories Web Search

Interest over time ?



<b>RISING</b>	
covid 19	Breakout
covid 19 cleaning	Breakout
cleaning for covid	Breakout
cdc	Breakout
cdc cleaning covid	Breakout
covid cleaning services	Breakout
cdc covid 19	Breakout
cdc covid 19 cleaning	Breakout
covid 19 cleaning products	Breakout
covid 19 cleaning services	Breakout
cleaning groceries covid	Breakout
clorox wipes	Breakout
airbnb covid cleaning	Breakout
dental cleaning during covid	Breakout
covid 19 cleaning checklist	Breakout
covid cleaning certification	Breakout
cleaning groceries covid 19	Breakout
covid cleaning services near me	Breakout
cleaning groceries during covid 19	Breakout





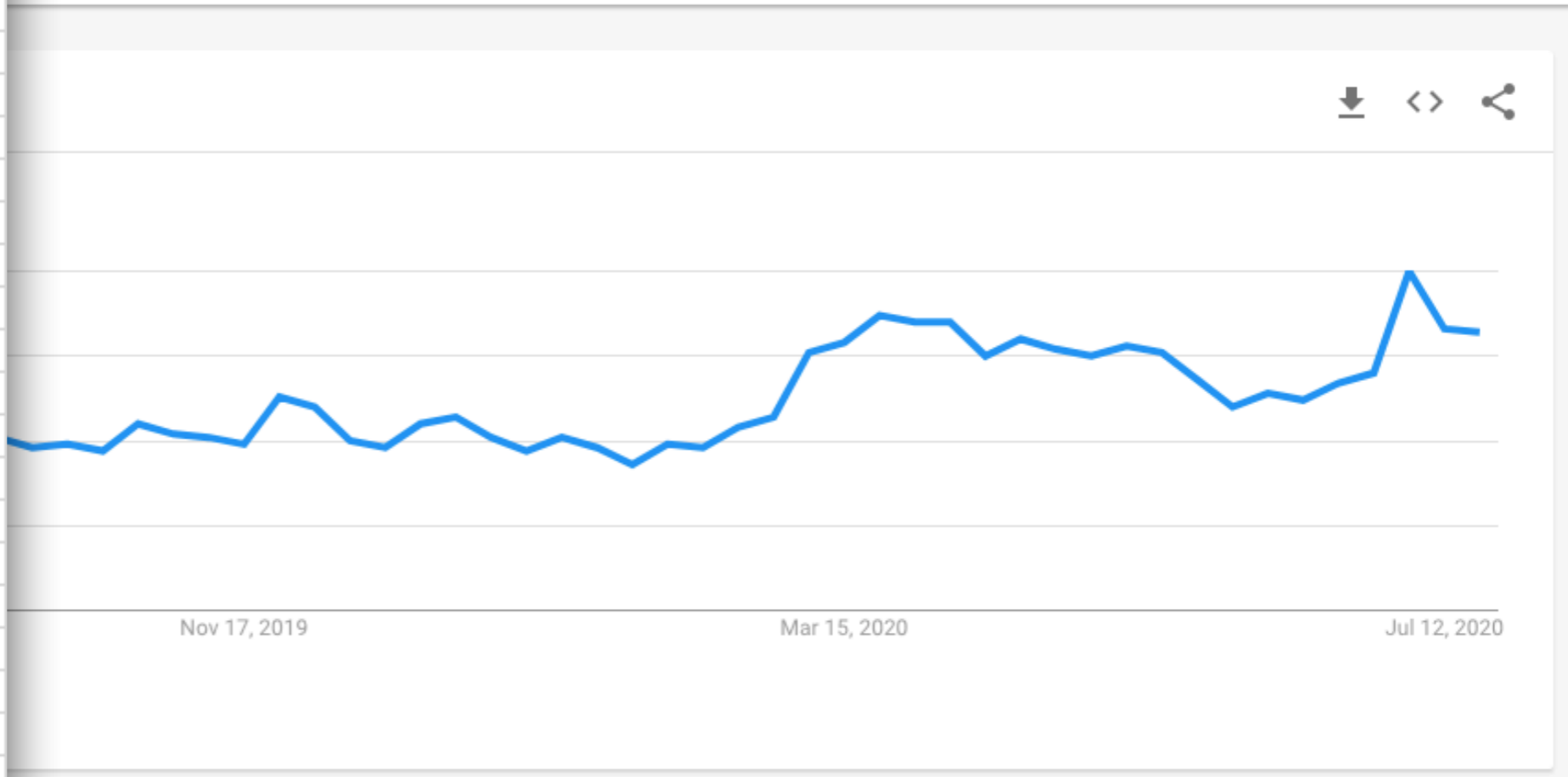
# Last 12 Months

● air purifier  
Search term

+ Compare

RISING	
air purifier coronavirus	Breakout
air purifier covid	Breakout
air purifier covid 19	Breakout
air purifier for covid	Breakout
air purifier for coronavirus	Breakout
clarifion air purifier	Breakout
air genie air purifier	Breakout
air genie	Breakout
vremi air purifier	Breakout
ultraviolet air purifier	Breakout
claritin air purifier	Breakout
angel air purifier	Breakout
airgenie air purifier	Breakout
dyson bp01 pure cool me air	4450%
iwave-r air purifier	4200%
clarifion air purifier reviews	4200%
best air purifier 2020	2800%
lg puricare 360-degree air pur	2000%
air purifier necklace	900%
air purifier for viruses	750%
nuwave oxypure air purifier	750%
oxypure air purifier	700%
uv light air purifier	600%
honeywell humidifier	400%
nuwave air purifier	350%

12 months ▾ All categories ▾ Web Search ▾



**Google Trends, Last 12 Months  
July 21, 2020**



## ***Airborne Coronavirus: What You Should Do Now***

How to protect yourself from a virus that may be floating indoors? Better ventilation, for starters. And keep wearing those masks.

## **Quality of indoor air plummeted in some homes during COVID-19 shutdown**

### **WGBH NEWS**

LOCAL

## **Growing Understanding Of Airborne Coronavirus Puts Focus On Air Conditioning**

## **FiveThirtyEight**

Politics Sports **Science** Podcasts Video

JUL. 20, 2020, AT 6:00 AM

## **How To Make Indoor Air Safer**

## **How spending more time at home might affect your health**

Author Emily Anthes thinks of 'homes as ecosystems'

By Justine Calma | @justcalma | Jul 15, 2020, 1:16pm EDT

## **COVID-19: Will air purifiers protect you from viruses?**

Experts weigh in on the practical value of air cleaners to address viruses, irritants and other pollutants.

JUL. 20, 2020, AT 6:00 AM

# How To Make Indoor Air Safer

By Kaleigh Rogers

Filed under Coronavirus

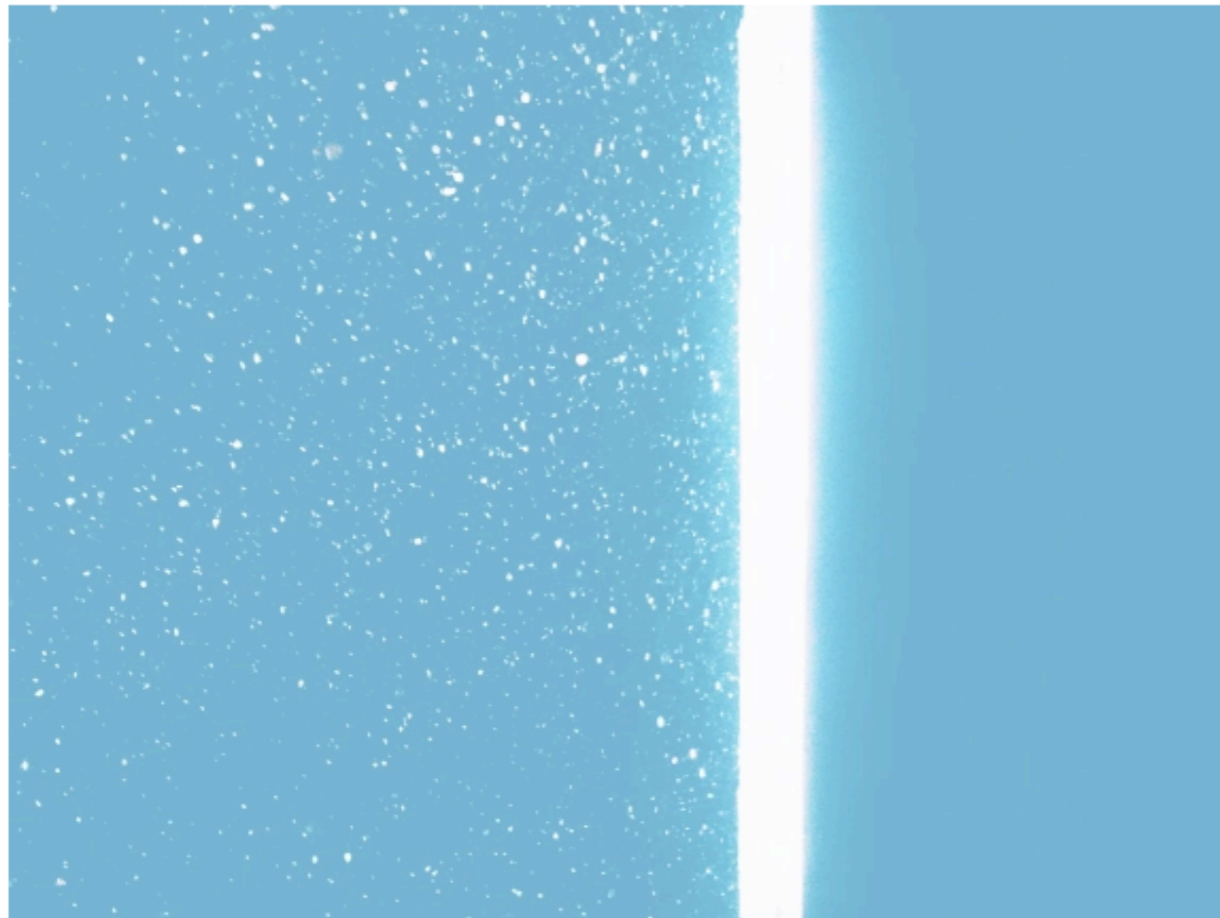


PHOTO ILLUSTRATION BY FIVETHIRTYEIGHT / GETTY IMAGES

If you're waiting for a break from bad news about COVID, don't hold your breath — or, actually, *do* hold your breath.

RECOMMENDED

**Every Decision Is A Risk. Every Risk Is A Decision.**

**How Can A Senator Vote With Trump Most Of The Time And Still Be A Moderate?**

**America Is Testing For COVID-19 More Than Ever — And It Still Isn't Enough**

# The New York Times

The Coronavirus Outbreak >

LIVE

Latest Updates

Maps and Cases

Who's Wearing a Mask?

Possible Treatments

Economy

## *The Coronavirus Can Be Airborne Indoors, W.H.O. Says*

The agency also explained more directly that people without symptoms may spread the virus. The acknowledgments should have come sooner, some experts said.



A restaurant in São Paulo, Brazil, on July 6. The coronavirus may linger in the air indoors and infect people, the W.H.O. acknowledged. Sebastiao Moreira/EPA, via Shutterstock

**July 9, 2020**

## 3 Current Mega-Narratives (IMHO)

- **It's Airborne and Lingers Indoors**
- **Air Conditioning (& Heating in the Fall) May Spread it Around the House**
- **Confusion About Purification Technologies**

~~Proper Ventilation is the Solution~~

# HVAC

(finally getting its due?)

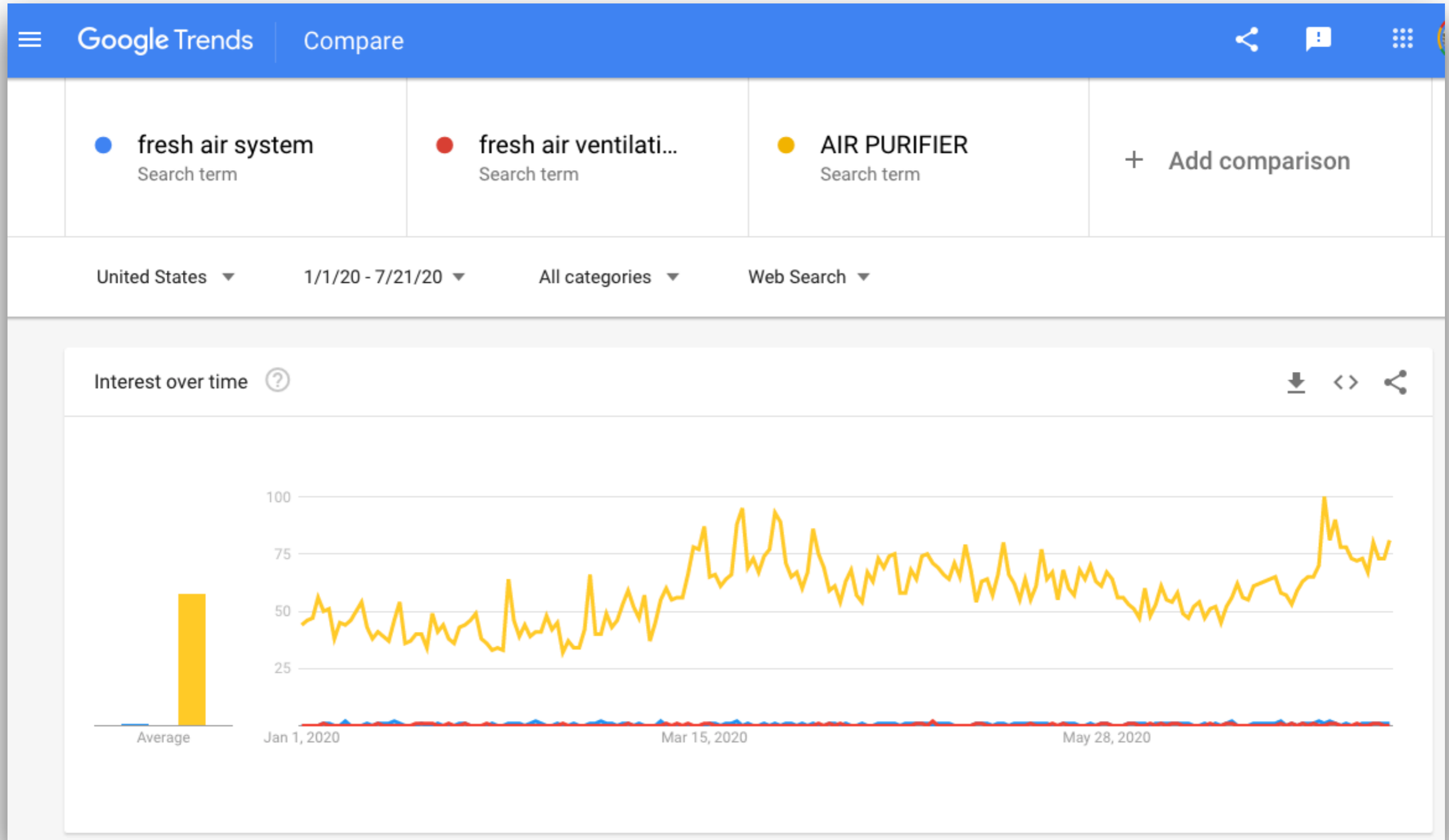


## Building America Building Science Translator

<b>Building Science Measure</b>	<b>New Building Science Terminology</b>
Indoor Environment System (cont.)	
Dilution - Whole- House Ventilation	Fresh Air System
Supply-Only Ventilation	Fresh Air Supply System
Exhaust-Only Ventilation	Fresh Air Exhaust System
Balanced Ventilation	Fresh Air Balanced System
Properly Installed Whole-House Ventilation	Professionally- Installed Fresh Air System



# 2020 Year to Date



# Shifts in Advertising Channels

Shock to loyalty

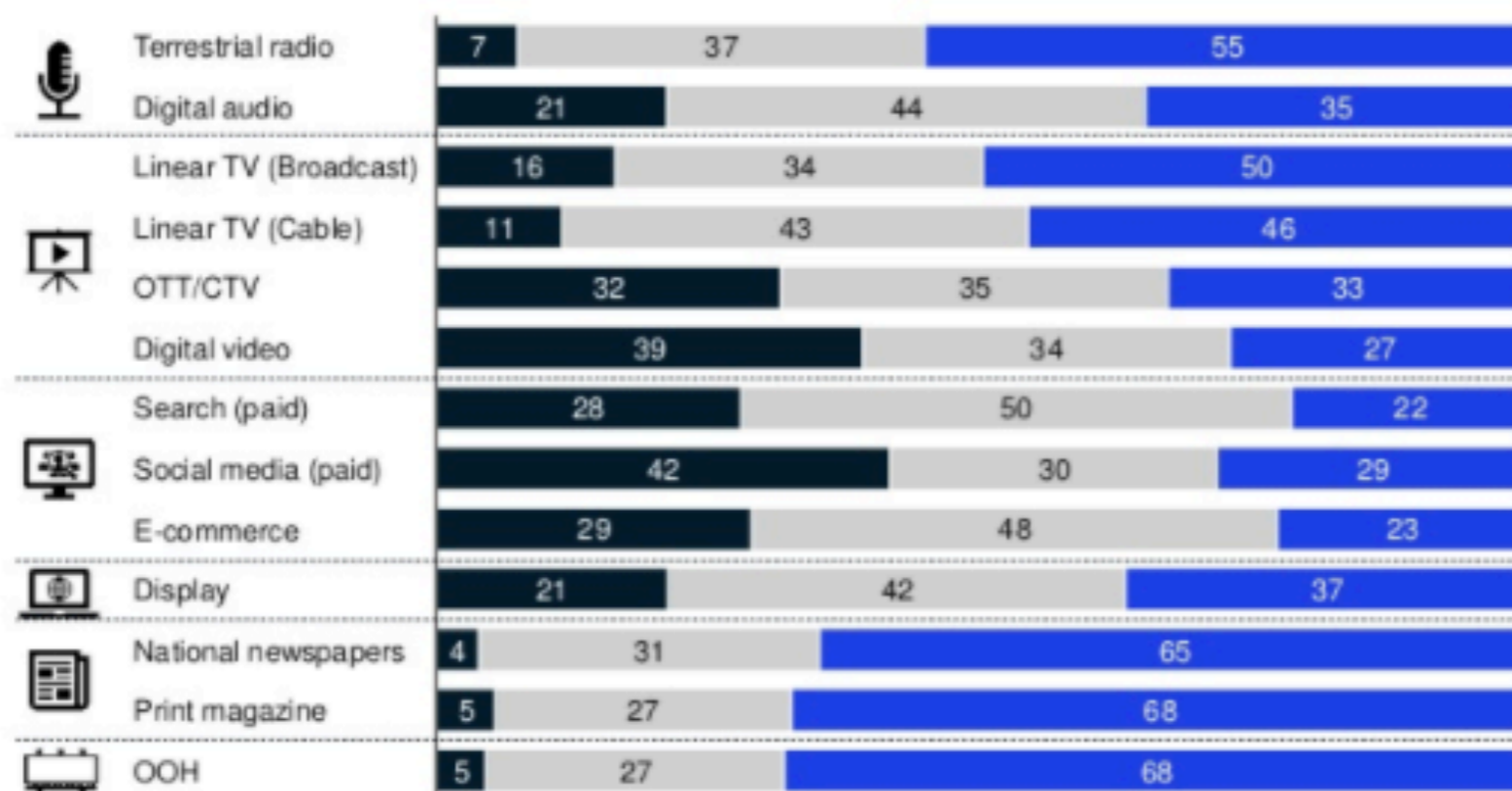


## With shifts in media usage and ad effectiveness, advertisers are shifting budgets toward digital channels

### 2020 ad spend vs 2019 by media type<sup>1</sup>

% of total respondents

■ Increase ■ Stay the same ■ Decrease



As consumers focus their attention on digital media while at home, advertisers report that video and search/social/e-commerce provide the highest ROI<sup>2</sup>

<sup>1</sup> Q: Do you expect your 2020 advertising spend with each of the following media types will increase, stay the same or decrease compared to 2019?

<sup>2</sup> Q: Which 3 media types are providing the best ROI during the coronavirus (COVID-19) outbreak?

Source: McKinsey Advertiser Perceptions Coronavirus Effect on Advertising Report, n=151, May 8, 2020

McKinsey & Company 17

McKinsey & Company COVID-19 US Consumer Pulse Survey 6/15-6/21. n=2006

# Energy Circle Search Marketing Dataset

- **Solar & Storage**

Volume has weakened in Covid hot spots  
Storage/battery is up. Emergency season?

- **HVAC**

Seasonal volume remains strong in most places  
Some slowing in newer hot spots  
Whole house fans way up—recognition of ventilation value?

- **Home Performance**

Strong comebacks by most companies post-shutdown  
Heat pumps remain strong

- **Healthy Home/Indoor Air Quality/Purification/Filtration**

Testing terms down vs specific services & ventilation— jump to solution?  
More volume, more competition, rising CPC's

# Wrap Up & Questions

- **Embrace the Digital/Virtual Transformation**

Zoom, Google Meet, Etc. Get set up properly

Virtual sales are different—lower appointment %, harder/longer closes

Fill the gaps: online proposal software, dispatch, CRM, etc.

- **Assess Your Marketing Mix/Shift Priorities**

How much previously dependent on in person tactics?

- **Healthier Homes Focus**

All in on Fresh Air Systems?

- **Get Ready for a Fall Like No Other**

Drumbeat of scary news

What's it mean for traditional readying for Winter market?

[peter@energycircle.com](mailto:peter@energycircle.com)



**END**