

# **Quantifying a Moving Target: Challenges in Measuring Market Share for Market Transformation Programs**

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## **Introduction**

This poster presents Enbridge Gas Distribution (Enbridge)'s experience in measuring the success of the company's first Demand Side Management (DSM) market transformation program. The program's objective was to increase the market share of ENERGY STAR® windows in the company's franchise area in 2005 and 2006. There were no customer rebates issued or counted for this program, and therefore there was no definitive, internal tracking mechanism to measure window sales or market share changes. Consequently, post program research meant that Enbridge had to rely on the responses of industry manufacturers once again participating in this post-period survey. The poster discusses the marketing activities and market research processes and issues completed over this period pertaining to the ENERGY STAR® windows program.

## **Enbridge's Approach to Promoting ENERGY STAR® Windows**

Enbridge used a multi-faceted marketing strategy to increase market share of ENERGY STAR® over each twelve-month program period. Marketing tactics included introducing and promoting the ENERGY STAR® product to window manufacturers, encouraging certification by these manufacturers, and assisting in the education of manufacturers' customers (both residential homeowners and residential low-rise builders) about the benefits of installing ENERGY STAR® windows. Developing personal relationships with manufacturers and providing benefits to them from the study was critical to obtaining ongoing participation in the yearly surveys.

## **Issues Overview**

Enbridge faced five key challenges in measuring the market share for this program:

First, Enbridge faced the need to start program activities (in January) before the baseline information from the previous year was available. Secondly, Enbridge had to recruit a significant number of manufacturers (including key large manufacturers) in order to have an adequately sized survey population that represented market activity. Thirdly, the company's desire to recruit more survey participants over the period of the study conflicted with the requirement to use the same cohort of manufacturers for the pre and post analysis. Additionally, changes in personnel at the manufacturers can lead to misinterpretation of survey questions between the pre and post surveys hence skewing the results. Finally, another significant challenge Enbridge faced was the time lag in obtaining manufacturers' information from the previous year and the utility's regulatory requirement to submit a results report within a specified time period.