ZERØ EMISSIONS.
ZERØ COMPROMISE.

December 7, 2016

weber shandwick

FCHEA
Fuel Cell & Hydrogen Energy Association

Today's Agenda

- Research & Insights
- Outreach Objectives
- Strategic Approach

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Research & Insights

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Research Objectives

1. Gauge familiarity and favorability toward alternative fuel vehicles and infrastructure in key markets.

2. Understand opinion leaders' priorities and willingness to support measures to advance this technology as well as perceived benefits and drawbacks.

3. Test refined messages and taglines to understand the most resonant way to communicate on the benefits and importance of this technology.

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Key Research Findings & Insights

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Key Findings
Awareness, Favorability, and Shifts in Opinion

FCV awareness is relatively low

- Though many influencers have heard of fuel cell vehicles, only a small share have more than surface-level knowledge about them. Significantly more influencers have heard of both hybrids and battery electric vehicles. The knowledge gap is even more distinct when influencers rate their *level* of familiarity with each. As expected, Sacramento has a higher FCV awareness than Boston or NYC.
- *Moving forward: Education on details and benefits of FCVs are needed to foster higher awareness.*

FCV favorability is greatest among those already familiar

- Though most opinion influencers don't know enough to have strong opinions on FCVs, those that do know about FCVs hold quite favorable feelings about them.
- *Moving forward: Capitalize on the connection between high familiarity and favorability. Education on details and specifics is also an area of opportunity for influencers to be true advocates (rather than passive supporters).*

Key FCV benefits include innovation, environmental impact, and energy security

- Fostering innovation, curbing negative environmental impact, and increasing energy independence are three broadly understandable and winning themes that can (and should) be tapped early in messaging. On the other hand, most influencers don't see (or understand) an initial connection to job creation, likely because they lack the context to see how this would play out.
- *Moving forward: Focus on benefits that are vehicle-focused rather than economic focused.*

Seeing messaging helps grow greater FCV favorability

- After reading specific messaging related to FCVs, double digit increases are observed in favorability, perceived benefits, and likelihood to take action in support of FCV technology and infrastructure.
- *Moving forward: In communications work across key markets, continue to emphasize the benefits of innovation, environmental impact, and energy security.*

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FCV Benefits and Concerns

#1 benefit: Environmental

- Environmental benefits are by far the most often cited community-level benefit of FCVs. This may be because the association doesn't require greater knowledge of vehicle operation or infrastructure.
- However, the environment may be the most-mentioned benefit simple due to lack of exposure to other possibilities. Influencers are unlikely to know about the operation of the vehicles themselves and may not be confident with the complicated nature of economic impacts of FCV and their development.
- *Moving forward: Simple environmental message is an effective way to pique the interest of influencers.*

#1 concern: Safety

- Though one-third of influencers have no concerns about FCVs and their introduction or expansion, safety is at the top of the list among those who do express concerns. Less prevalent concerns include cost and availability, though these do not come to mind often without prompting.
- *Moving forward: Address concerns of hydrogen safety head-on by demonstrating the ways in which the vehicles and infrastructure are tested and secure.*

Educate on vehicles first and infrastructure second

- When presented with a list of possible drawbacks or concerns about FCVs, influencers pick up most on the lack of station availability. However, this is unlikely to be a major deterrent to support because it does not come up unaided. Influencers aren't thinking about the infrastructure network with the same amount of worry as vehicle safety.
- *Moving forward: When looking to grow support for FCVs and infrastructure, education must exist at the vehicle level first before speaking to the broader details that don't pertain directly to drivers.*

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Messaging and Taglines

Safety and environmental messages are most important to hear

- In line with attitudes surrounding perceived benefits and concerns, FCHEA's messages about safety and the environment are most personally important for influencers. Innovation and economic messages are somewhat less resonant due to their potentially more abstract nature, whereas safety and the environment offer an easier connection to vehicles in general.
- *Moving forward: The environment message is a strong benefit, while the safety message is necessary to assuage concerns.*

Markets are most motivated by different messages

- The story is similar for which messages are most motivating for support, with safety and environment near the top. However, the message on convenience receives a much higher rating for motivation in Sacramento than elsewhere—a slight deviation from other key markets.
- *Moving forward: Keep in mind that that, compared to East coast influencers, Sacramento thinks somewhat more practically about FCVs due to their existing presence in the region.*

"Zero Emissions, Zero Compromise" strongest tagline

- Zero Emissions, Zero Compromise is the strongest tagline, both overall and in a head-to-head forced-choice test. Its clear reference to one of the most important and compelling benefits (the environmental factor) and its direct nature place this tagline ahead of the rest.
- *Moving forward: In the chosen tagline, it's useful to convey the benefits while underscoring that drivers don't give up safety or performance.*

Interest in learning more about FCVs is strong

- Regardless of what messages they read and what they prefer, clear majorities in each city are interested in learning more about FCVs. Based on the survey's split-sample exercise, a shorter, more pointed, and more direct message about driver benefits is more likely to pique interest in FCVs than a longer, more high-level discussion of vehicle and infrastructure benefits.
- *Moving forward: Influencers' greatest "need to see" from FCHEA and other advocates of FCVs is information about price and the cost of fueling. They view themselves as consumers first and advocates second.*

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Outreach Objectives

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Outreach Objectives

Campaign goal:

Get government officials and influencers in key markets to champion fuel cell vehicle infrastructure and ask, "What can we do to make these vehicles possible here?"

Focus on high level influencers and key opinion leaders:

- Make the case for infrastructure
- Introduce FCVs and FCV technology to uninformed
- Make sure those who know about FCVs have the right information
- Clarify and substantiate the environmental benefits
- Leverage innovation, economic benefits, diverse vehicle options and "cool factor"
- Bring CA success stories to the Northeast
- Leverage existing strengths of the entire fuel cell industry
- Get them in cars
- Support California efforts

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Audience Insights

Who is our audience?	High level influencers and key opinion leaders in policy, NGOs, media, investment, and business, particularly those interested in energy policy, tech and auto. Geographic targets include the metropolitan areas around Boston, Hartford, NYC, Albany, DC, Detroit, Sacramento and San Francisco. Phase II geographic targets include RI and NJ.
Where do they get information?	Mainstream policy outlets, mainstream media, trusted influentials (NGOs, relevant organizations, key constituents, etc.), some social/ digital channels
Who do they trust?	Experts from established organizations whose voices can be shared and established media organizations

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Strategic Imperatives

We Know	We Must
Influencers have limited knowledge of FCVs, but want to learn more and experience the cars.	Expose influencers to a steady drum beat of messaging and get them in cars so they can serve witness.
The greatest benefits, strongest messages, and most motivating reasons to support FCVs are environmental.	Make the environmental case directly and forcefully to influential audiences.
Limited exposure to, and awareness of, FCVs mean that influencers don't have enough information to take supportive action.	Shore up likely supporters first in controlled settings and build broader and deeper awareness before asking for their support.
Increased awareness leads to increased support.	Create consistent news, opinion coverage and social content to grow awareness and consideration.
Safety of hydrogen is largest concern of FCV expansion and infrastructure development.	Debunk safety concerns with comparison messaging, and showcase benefits of infrastructure development.
If FCVs aren't successful in California, the Northeast is moot.	Support California efforts through Partnership and by showcasing success in the Northeast.

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Core Positioning

Fuel cell vehicles, or FCVs, present a sustainable alternative to today's gasoline powered cars. Driven by innovation and with zero emissions from the tailpipe, fast fill up, and long range travel, FCVs are next generation electric vehicles that provide a choice that is clean without compromise.

Now is the time to join California and support FCVs as alternative energy vehicles by enabling the additional development of hydrogen fueling stations and helping Northeast states meet their environmental goals. With refueling times of just three to five minutes and range of 300 – 400 miles, FCVs are instrumental in driving toward a cleaner future.

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Strategic Approach

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Strategic Elements

California Support

Meetings with Influencers and Decision makers

Earned Media

Digital Content & Paid Promotion

Participation in Industry Events

Measurement through KPIs

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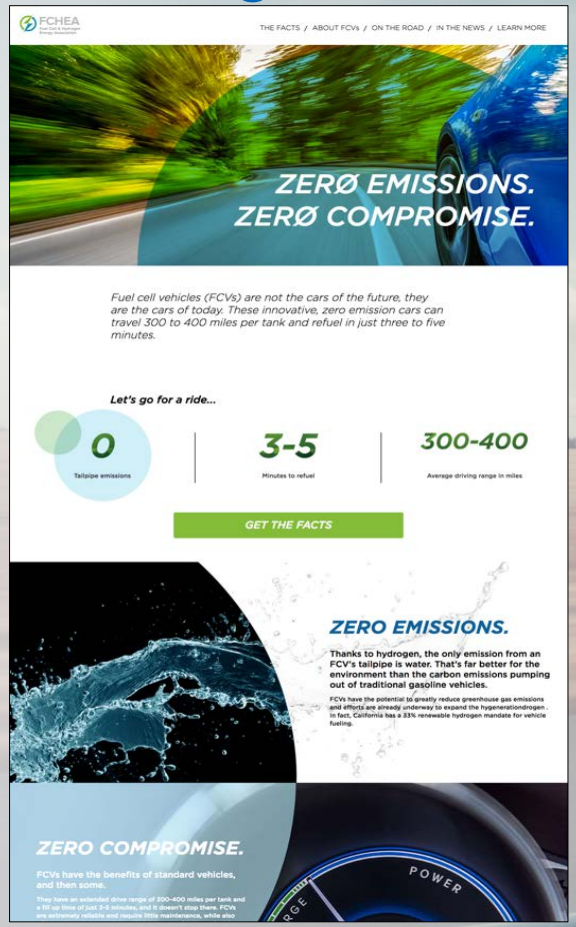
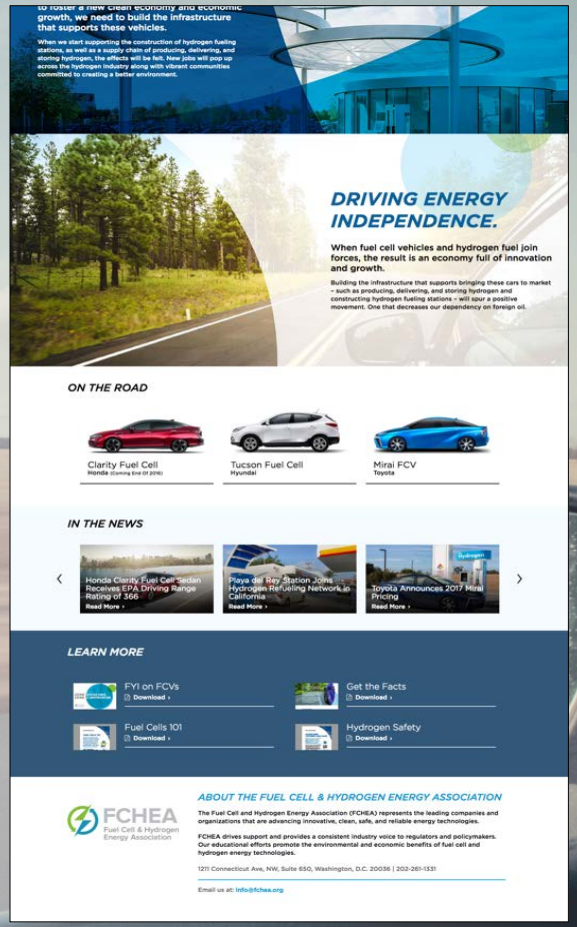
ZeroEmissions.org





Zero Emissions. Zero Compromise. Content

Make the best case re: environment, safety, technology and innovation

- + Brochure
- + Infographic
- + Fact sheet with key data points

Meetings with Influencers and Decision makers

Visit each target city meeting influencers and engaging in more public media opportunities.

PHASE 1 Introduction	PHASE 2 Build the Momentum	PHASE 3 Advocacy & Support
Hold 1:1 meetings with NGOs, policymakers and reporter desk sides	Align with car company to schedule “drive days” in target markets to let audiences see, ride in and experience cars	Reinforce messages with stakeholders and ask for specific support

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A Focus on California

- Work with the existing CA resources and organizations
- California's early success is critical to garnering support in the Northeast U.S.
- Attended several events in 2016
  - Los Angeles Auto Show – Met with West Coast editors of automotive trade press
  - Society of Environmental Journalists – Annual Meeting held in Sacramento
  - National Association for County Officials - Annual meeting held in Long Beach
  - International Partnership for Hydrogen and Fuel Cells in the Economy – Stakeholder Engagement Meeting held in Berkeley

Digital Strategy

- Our digital strategy focuses on reaching key audiences at the right time and in the right place

- Multi-channel approach focusing on social media, display advertising, and opportunistic media

Summary

Stakeholder Engagement:

- Briefings in state capitals and key markets with focus on influencers in transportation and environment
- Consistently engage with key business groups

Media:

- Continued bylined pieces in trades and sustainability outlets
- Expand earned media engagement
- Media briefings and 1:1 interviews

Events/ Visibility:

- Be seen as part of the business community and network at events with key groups
- Create owned events with relevant business or environmental partner in key markets

Digital:

- Search Campaign
- Ongoing paid around key moments

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Discussion

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