

Reaching all Energy Trust Customers

*Evolving definitions,
assumptions & research*



Who is Oregon?

- 78% white
- 42% reside in Portland
- 30% have at least a BA or higher



Reaching all Eligible Customers

Are certain groups of customers not participating at the level we would expect?

- What do we know about these customers?
- What can we learn?
- Are there alternative engagement approaches?

Learning Approaches

- Looked at whether residential customers in non-metro areas or in high-minority or high-poverty tracts are participating at the expected level
- Current research is focused on learning more about certain groups of customers and acquiring additional demographic and psychographic characteristics of participants and non-participants
 - May lead us to new engagement approaches

2014 Research

Geographic analysis

- Households in tracts in the Tri-County region received more incentives and savings, and had a higher percentage of participating sites compared to households outside of the Tri-County region



2014 Research Continued

Demographic analysis

- High-poverty tracts had lower participation rates, lower gas savings and higher electric savings as compared to eligible households in those tracts
- High-minority tracts had higher participation rates and higher electric and gas savings as compared to eligible households in those tracts



2015 Research

Geographic analysis 2012-2015

- Electric savings by Energy Trust customers in the non-Tri-County region were 6% higher than would be expected based on share of utility accounts.
- Gas savings by Energy Trust customers in the non-Tri-County region were 9% lower than would be expected based on share of utility accounts.



Ongoing Research

- Compared the composition of our trade ally contractor network against a business demographic database and found our New Building ally network has a greater percentage of minority- and women-owned businesses compared to the general business population

Current Research

Identifying opportunities to engage:

- Location
- Income
- Education
- Ethnicity/Language/Culture
- Small Business

Multiple Approaches

External Data Overlay >>>

Customer Insights Study >>>

Focus Groups >>>



External Data Overlay

Weatherization

- Age differences
- Income differences

Online Home Energy Review

- Age differences
- Income differences

Heat Pump Water Heater

- Income differences

Customer Insights Study

- To learn about differences in awareness, participation, attitudes about energy use and environment, perceived barriers and what they need to know to move forward
- Survey participants and non-participants

Focus Groups

- To learn about awareness among this group of eligible customers, how they make decisions about energy, and specific needs they might have around communications and outreach
- Latino, Asian and rural small business owners and decision makers

Next steps

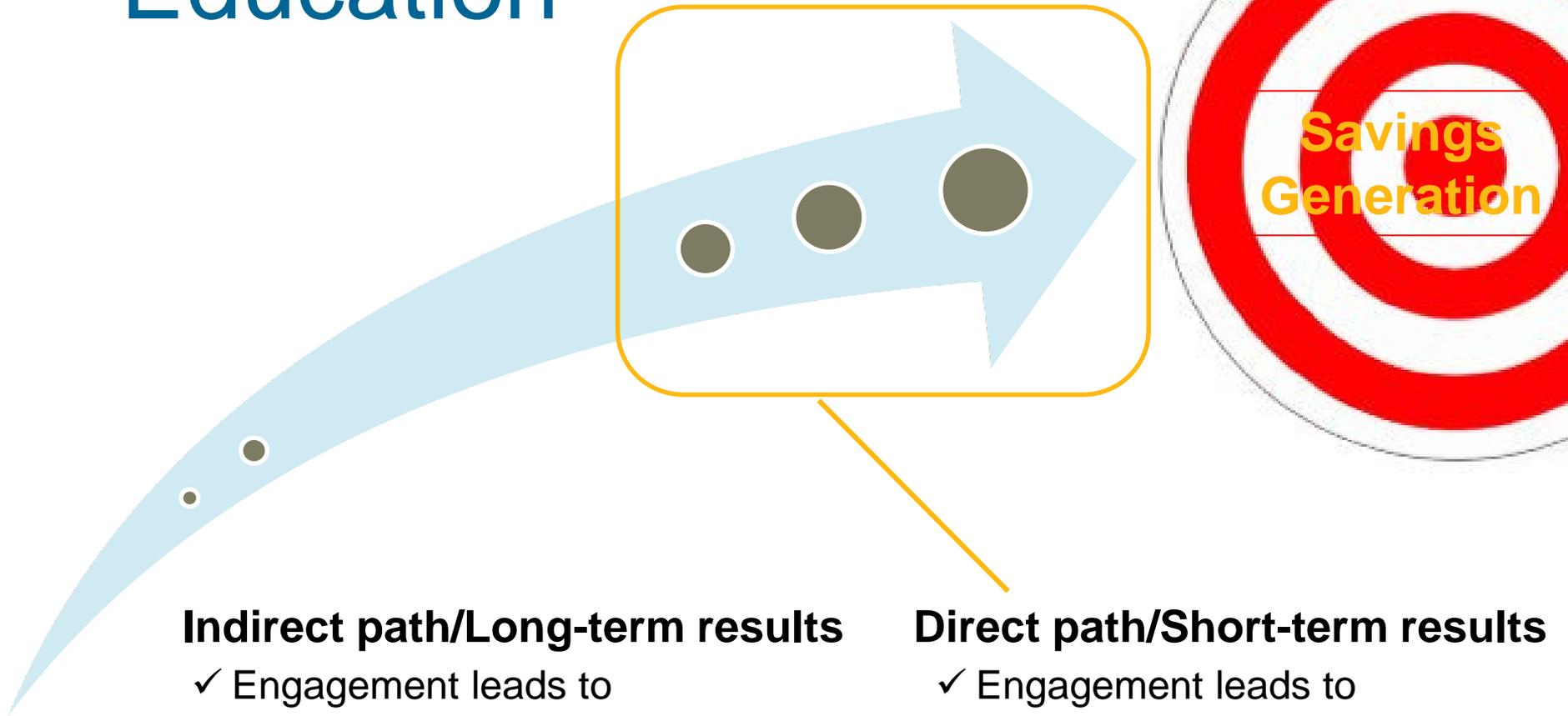
1. Customer insights survey
2. Additional focus groups
3. Ongoing efforts to reach all customers
4. Energy Trust Diversity Initiative

Thank you

Sue Fletcher and Shelly Carlton
sue.fletcher@energytrust.org
shelly.carlton@energytrust.org



Education



Indirect path/Long-term results

- ✓ Engagement leads to knowledge, understanding, skills
- ✓ Action may be in future years
- ✓ Eventual savings & generation not measured

Direct path/Short-term results

- ✓ Engagement leads to savings or generation
- ✓ Action is built-in
- ✓ Expected savings & generation measured

- Insights from External Data overlay

Savings Within Reach moderate-income qualifications ▼

Household size	Gross annual income	
	Minimum	Maximum
1 resident	\$23,340	\$52,530
2 residents	\$31,460	\$60,070
3 residents	\$39,580	\$67,486
4 residents	\$47,700	\$75,025
5 residents	\$55,820	\$81,082
6 residents	\$63,940	\$87,014
7 residents	\$72,060	\$93,071
8 residents	\$80,180	\$99,004

- Insights from Focus Groups

Defining Hard-to-Reach

2016-2017

- Non-participants
- To be examined:
 - Age
 - Barriers
 - Familiarity

2015 Research

Participation within and outside of tri-county region

- Greater electric savings in the non-Tri-County relative to its share of utility customers - this share has grown over time
- Energy Trust has gotten the same proportional level of savings and incentives from the non-Tri-County region as the Tri-County region (30 percent of the savings, 28 percent of the incentives as opposed to expected 39%).



Approaches we've tried

Changed
incentives

Low-cost,
no-cost

Community
efforts

Market
development

Joint work
with utilities

Cost
reduction
strategies

2015 Research

Participation within and outside tri-county region

- Electric savings in the non-Tri-County **are** ~~has~~ ~~garnered greater savings~~ relative to its share of utility customers and this share has grown over time (2012 to 2015 is six percentage points greater).
- In delivering gas savings, Energy Trust has not been deriving the same proportional level of savings and incentives from the non-Tri-County **customers** ~~region~~ as the Tri-County **customers** ~~region~~ (**non-tricounty is 30 percent of the savings, 28 percent of the incentives as opposed to expected 39%). CAN WE MAKE SENSE OF THIS??**

Tri-County Tracts in Electric & Gas Territory

Geographic Analysis		Tri-County Tracts	Non-Tri County Tracts	% Difference
Energy Trust Variables	% Participating Sites*	36%	20%	80%
	Incentives* (per HH)	\$93	\$43	116%
	Electric Savings* (per HH)	353	178	98%
	Gas Savings* (per HH)	13	5	160%
Census Variables	% Rental Units*	33%	24%	38%
	% Multifamily Units*	30%	20%	50%

* Denotes statistically significant difference

Tri-County Tracts in Electric & Gas Territory

Economic Analysis		High Poverty Tracts	Non High Poverty Tracts	% Difference
Energy Trust Variables	% Participating Sites*	22%	37%	-41%
	Incentives (per HH)	\$91	\$93	-2%
	Electric Savings* (per HH)	478	337	42%
	Gas Savings* (per HH)	10	14	-29%
Census Variables	% Rental Units*	68%	35%	94%
	% Multifamily Units*	66%	29%	128%

* Denotes statistically significant difference

Tri-County Tracts in Electric & Gas Territory

Race/Ethnic Minority Analysis		High Minority Tracts	Non High Minority Tracts	% Difference
Energy Trust Variables	% Participating Sites*	31%	38%	-18%
	Incentives (per HH)	\$84	\$96	-13%
	Electric Savings (per HH)	382	342	12%
	Gas Savings* (per HH)	10	15	-33%
Census Variables	% Rental Units*	47%	36%	31%
	% Multifamily Units*	36%	31%	16%

* Denotes statistically significant difference