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

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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

<table>
<thead>
<tr>
<th>Household size</th>
<th>Gross annual income</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Minimum</td>
</tr>
<tr>
<td>1 resident</td>
<td>$23,340</td>
</tr>
<tr>
<td>2 residents</td>
<td>$31,460</td>
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<tr>
<td>3 residents</td>
<td>$39,580</td>
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<tr>
<td>4 residents</td>
<td>$47,700</td>
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<td>5 residents</td>
<td>$55,820</td>
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<tr>
<td>6 residents</td>
<td>$63,940</td>
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<tr>
<td>7 residents</td>
<td>$72,060</td>
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<tr>
<td>8 residents</td>
<td>$80,180</td>
</tr>
</tbody>
</table>
• 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??
<table>
<thead>
<tr>
<th>Geographic Analysis</th>
<th>Tri-County Tracts</th>
<th>Non-Tri County Tracts</th>
<th>% Difference</th>
</tr>
</thead>
<tbody>
<tr>
<td>Energy Trust Variables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Participating Sites*</td>
<td>36%</td>
<td>20%</td>
<td>80%</td>
</tr>
<tr>
<td>Incentives* (per HH)</td>
<td>$93</td>
<td>$43</td>
<td>116%</td>
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<tr>
<td>Electric Savings* (per HH)</td>
<td>353</td>
<td>178</td>
<td>98%</td>
</tr>
<tr>
<td>Gas Savings* (per HH)</td>
<td>13</td>
<td>5</td>
<td>160%</td>
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<tr>
<td>Census Variables</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>% Rental Units*</td>
<td>33%</td>
<td>24%</td>
<td>38%</td>
</tr>
<tr>
<td>% Multifamily Units*</td>
<td>30%</td>
<td>20%</td>
<td>50%</td>
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</table>

* Denotes statistically significant difference
## Tri-County Tracts in Electric & Gas Territory

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

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# Tri-County Tracts in Electric & Gas Territory

<table>
<thead>
<tr>
<th>Race/Ethnic Minority Analysis</th>
<th>High Minority Tracts</th>
<th>Non High Minority Tracts</th>
<th>% Difference</th>
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</thead>
<tbody>
<tr>
<td>% Participating Sites*</td>
<td>31%</td>
<td>38%</td>
<td>-18%</td>
</tr>
<tr>
<td>Incentives (per HH)</td>
<td>$84</td>
<td>$96</td>
<td>-13%</td>
</tr>
<tr>
<td>Electric Savings (per HH)</td>
<td>382</td>
<td>342</td>
<td>12%</td>
</tr>
<tr>
<td>Gas Savings* (per HH)</td>
<td>10</td>
<td>15</td>
<td>-33%</td>
</tr>
</tbody>
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