2008

Energy Trust

Trade Ally Survey

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EnergyTrust of Oregon, Inc.

Executive Summary

This report summarizes the results of the 2008 Energy Trust of Oregon Trade Ally Survey. Originally conceived as a feedback tool for the Communications department about various offerings for trade allies it has since expanded. Now in its fourth year, the survey is still focused on feedback but now includes a program/measure specific market research component. The rationale for collecting self-reported data from the trade allies about their specific markets is two-fold. First, any change in the proportion of various efficient technologies that are being installed by trade allies can be analyzed. Second, the Trade Ally survey can be compared to evaluations and program reports to corroborate the results.

The 2008[1] Trade Ally Survey was sent via email to 616 trade allies when it was launched on May 6, 2008. The survey was closed June 7, 2008 with 104 complete surveys yielding a response rate of 17%. Survey respondents accounted for 11% of total incentives paid in 2006. Additionally, respondents accounted for 16% of incentives affiliated with the 616 trade allies who were contacted for the survey.

Key Findings & Recommendations

General Trade Ally Findings

Of those responding, 73 reported themselves as mainly working in the Residential program, 15 in Commercial, 6 in Industrial, 9 in Solar PV and Solar Thermal, and 1 respondent categorized themselves as “other”. Since the respondent who selected “other” was not asked follow-up questions about specific programs and measures, they have been dropped from the analysis. There were no respondents who worked mainly with “wind, hydro, or other renewables”.

Table 2.1 Survey respondents by program

	Count
Residential	73
Commercial	15
Industrial	6
Solar	9

The four programs are analyzed separately.

Specific measures reported on, with number of respondents in parentheses:

Commercial

- Lighting (8)

Residential

- Gas Furnace (24)
- Heat Pump (10)
- Windows (12)
- New Site-Built Homes (11)

General Program Demographics & ODOE tax credits

Seventy percent of trade allies indicated that they have been working with the agency for more than two years. Almost one third (32 percent) received a majority of their revenue from projects involving Energy

[1] To clarify confusion with the nomenclature, the ‘2008 report’ covers the 2007 program year.

Trust incentives. The proportion of work done in Clark County, Washington was low, with 81percent of trade allies drawing less than a quarter of their revenue from that area.

Despite most trade allies working with Energy Trust for several years, a notable portion were not completely familiar with Oregon Department of Energy tax credits. Residential trade allies were the least familiar, with 42 percent only having heard of the tax credits or not knowing how to answer the question. This has been an issue in past trade ally surveys.

Recommendation

- Energy Trust should seek to provide trade allies with training on the tax credits and tools to help them promote the BETC and RETC to customers.

Marketing, networking, rewards, and training feedback

Trade allies were asked to rate their interest in various Communication related questions on a 1 to 5 scale. 1 indicated 'no interest' while a 5 indicated 'very interested'. The following figures represent the percentage of trade allies who responded that they were 'interested' (4) or 'very interested' (5) in various Energy Trust communication offerings.

Marketing:

- Cooperative advertising support……...54%
- Ad calling attention to Energy Trust programs……...48%
- One-on-one marketing consulting provided by Energy Trust.. 37%
- Marketing workshops…… 39%
- Marketing to boost Energy Trust brand recognition…….. 47%

Networking Opportunities:

- Networking within your specialty/trade……...37%
- Networking within your program (across trade)…….. 39%
- Networking within your region……...……..... 40%

Rewards:

- Scholarships to energy conferences…….....40%
- Publicity through press releases……..……51%
- Trade Ally of the month……..... 32%
- Case studies of trade allies…….....32%
- Award ceremonies…….. 20%

Training:

- General training on Energy Trust programs……63%
- Technical training on energy efficiency……42%
- Technical training on program measures and compliance….. 38%
- Small business management…… 15%

Recommendation

- Trade allies were primarily interested in more training on Energy Trust programs. Rather than a comprehensive training that might cover most of the programs and aspects trade allies are already familiar with, Energy Trust might consider having a Question and Answer session, or making such a session part of a trade ally roundtable.

Insider Newsletter

Trade allies generally find the newsletter helpful, with a large majority reporting it was 'somewhat' helpful. However, 45 percent of trade allies were not fully aware of the newsletter.

Recommendation

- In the future, more specific survey questions should be employed to elicit feedback about vendor expectations of the newsletter. Open-ended comments suggested more informative articles covering problems trade allies encounter and related solutions, as well as progress updates on Energy Trust program goals.

Energy Trust Website

Most respondents visit the trade ally webpages occasionally, usually to download forms and view incentives. When asked for suggestions for changes to the website, most respondents requested improved navigation to find information more easily. The majority of trade allies were interested in online forms.

Recommendation

- When making website improvements consider giving priority to improving navigation, putting forms on one page, and enabling online form submission.

Efficiency Program Satisfaction

High levels of satisfaction were reported across all categories from trade allies.

Percent expressing 'Satisfied' or 'Very satisfied' responses for:

- Overall satisfaction…….……..... 78%
- Interactions with staff……...…….. 73%
- Response times…….....67%
- Requests for information…….....74%
- Requests for help on forms……... 75%

Renewable Program Satisfaction

Renewable contractors indicated high levels of satisfaction across all categories, with the exception of paperwork approval and responsiveness to inquiries.

Percent expressing 'Satisfied' or 'Very satisfied' responses for:

- Overall satisfaction…….……..... 78%
- Turnaround time for paperwork approval……...66%
- Responsiveness of staff to inquiries 66%
- Quality of Energy Trust inspectors...…….....100%
- Quality of your relationship with inspectors……. 100%

Commercial Trade Ally Findings and Recommendations

Commercial respondents primarily installed lighting (8).

Commercial lighting technology installations (weighted by firm size)

Percent of fixtures installed:

- Premium T8 – 40%
- T5 – 39%
- T8 – 20%

Recommendation

- Apart from occupancy sensors, relatively few projects involved the installation of lighting controls. Energy Trust may want to promote lighting controls more aggressively.

Industrial Trade Ally findings
Only 6 industrial trade allies responded to the survey; they reported a variety of primary measures installed.

Recommendation

- Low response rate among industrial vendors has been a consistent feature of trade ally surveys since 2005. For subsequent surveys, Energy Trust should explore ways to improve the response rate among vendors in this program, as it represents a substantial portion of the agency's overall budget.

Residential Trade Ally Findings and Recommendations
The majority of residential respondents installed gas furnaces (24). This was followed by windows, heat pumps, insulation and site-built homes.

Gas furnace installations in existing homes

- 95% or more efficient – 43%
- 90-94% efficient – 37%
- 80-89% efficient – 20%

Heat pump installations

- HSPF 9.5 or more – 10%
- HSPF 9.0-9.4 – 28%
- HSPF 8.5-8.9 – 47%
- HSPF 8.2-8.4 – 9%
- HSPF code – 6%

Window installations

- 0.30 U value or less – 39%
- 0.31-0.32 U value – 34%
- 0.33-0.34 U value – 20%
- 0.35 U value – 7%

New homes

- ENERGY STAR – 91%
- Earth Advantage – 74%
- ENERGY STAR and Earth Advantage – 66%

Recommendation

- The markets for gas furnaces and heat pumps have been dramatically transformed, and Energy Trust should consider adjusting its incentives for these measures.

Solar Trade Ally Findings and Recommendations
Most responding solar trade allies installed both photovoltaic and water heating systems in 2007. Most of their revenue came from residential, rather than commercial, projects. All firms saw an increase in inquiries about solar electric systems compared to 2006, and were able to pursue almost all qualified leads.

Recommendation

- Among the programs, solar trade allies were the most interested in networking opportunities; Energy Trust should explore opportunities to introduce solar trade allies to other professionals in the field.