2010 Energy Trust Trade Ally Survey

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October 3, 2010

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1. Executive Summary

This report summarizes the results of the 2010 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 sixth 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 2010[1] Trade Ally Survey was sent via email to 1,851 trade allies when it was launched on March 5, 2010. The survey was closed March 31, 2010 with 331 unique complete surveys, yielding a response rate of 18%. Of the completed surveys 273 were used in the final analysis due to the fact that some respondents represented the same company and that others were real estate agents and not traditional trade allies that install equipment or provide energy efficiency services. The number of respondents far exceeded expectations as past surveys typically had just over 100 trade allies completing the survey.

1.1 Key Findings & Recommendations

General Trade Ally Findings

Of the 273 respondents representing unique firms, 154 reported themselves as mainly working in the Residential program, 60 in the Commercial, 38 in Solar PV and Solar Thermal, 9 in Industrial, and 5 in renewables. Seven respondents categorized themselves as 'Other'.

General program demographics

Nearly 60%t of trade allies indicated that they have been working with Energy Trust for more than three years, 15% for less than one year. Twenty-eight percent of respondents received over half of their revenues from projects involving Energy Trust incentives, and 58% of respondents intend to increase the proportion of projects that involve Energy Trust in 2011.

Oregon Tax Credits, Green Streets and EBIX

Trade ally awareness of the Oregon Business and Residential Energy Tax Credits is near universal with only 13%of responding trade allies being unaware of the tax credits. Energy Trust's ongoing training in regards to the BETC/RETC appears to have had an impact.

Energy Trust works with Umpqua Bank to offer financing to residential and commercial customers through the Green Street lending program. Most of the trade allies are aware of the program (75%) and 15% actively market if (25% of the solar trade allies).

Recommendation

- As a large number of trade allies are familiar with this program and many actively offer it, it is recommended that Energy Trust allow these services to continue.

EBIX is a service that Energy Trust uses to track trade ally insurance status. This service received very low satisfaction ratings with less than half (44%) being satisfied with this service. Energy Trust is aware of many of these issues and has worked with EBIX to address them. It is anticipated that the insurance tracking function will be taken in-house once Energy Trust new Integrated Solutions Program (ISP) has been implemented in 2011.

[1] To clarify confusion with the nomenclature, the 2010 report covers the 2009 program year.

Energy Trust Support

Trade allies were asked to rate their interest in various types of Energy Trust support. Trade allies seem to be quite interested in cooperative advertising and in furthering their knowledge (via conferences, trainings, and regularly updated information) of energy efficiency, especially in their own trade.

Training

Sixty-four percent of responding trade allies reported that they had attended an Energy Trust sponsored training session in 2009 (or later); Over 60% of attending trade allies found the trainings 'valuable' or 'very valuable'. When asked what specific areas they would most like to be trained in, the most common responses were ODOE tax credits and savings calculation tools and program paperwork.

Recommendation

- Continue training programs that support trade allies' efforts to work with the program and take advantage of state and federal tax credits.

Roundtable Discussions

Almost half of respondents indicated that they had attended a roundtable discussion (80%attendied in past year) and 42% reported that the events were either 'useful' or 'very useful'. As in previous years, the location of the roundtable discussions are an important issue that create a major barrier to trade ally attendance.

Recommendations:

- Energy Trust should continue to hold roundtable throughout the state on a regular basis. Regular meetings with clear agendas with a timely notification should provide trade allies sufficient information to schedule the meeting.
- Clearly delineate sessions by program and specific topics to allow trade allies to attend those portions relevant to their business
- Continue to develop and expand web-based roundtables

Communication & the Insider Newsletter

The majority of responding trade allies prefer to be notified about program updates via email from program staff at least once a month. More than 3/4 of responding Trade Allies read the Insider newsletter occasionally and the majority find it to be at least 'somewhat useful'.

Recommendation

- Continue offering the Insider as an electronic publication.
- Continue to utilize email and other electronic communication avenues to communicate with trade allies.

Website

The majority of trade allies (84%) respondents visit Energy Trust's website at least once a month with program forms and program incentives the two most frequented web pages. The majority felt that the newly redesigned website was as good (22%), if not better (52%), to navigate than the old site. However the site could probably still be improved as the majority still does not believe that the site is very easy to navigate. Only a quarter of the respondents felt that a blog would be useful.

Recommendation

- In further efforts to upgrade the website a priority should be given to the forms and program incentives pages.

Energy Efficiency Program Satisfaction

Overall satisfaction levels of respondents reported by trade allies are higher on most counts. With solar trade allies year to year comparisons are hard to make due to the small number of respondents in 2009.

Percent *energy efficiency* trade allies expressing 'Satisfied' or 'Very satisfied' responses for:

	2010	2009
• Overall	73%	67%
• Incentive payment processing time	59%	57%
• Turnaround time for paperwork	61%	61%
• Interactions with staff	77%	69%
• Response times to requests for information	73%	66%
• Response times to requests for help on forms	73%	65%
• Quality of responses to your requests	74%	-
• Knowledge of ETO programs and procedures.	80%	-
• Firms responding	217	86

Percent *solar trade* allies expressing 'Satisfied' or 'Very satisfied' responses for:

	2010	2009
• Knowledge of Energy Trust programs and procedures	84%	-
• Incentive payment processing time	53%	72%
• Turnaround time for incentive app./approval of paperwork	55%	72%
• Interaction with Energy Trust program staff.	87%	75%
• Response times to requests for information.	72%	51%
• Response times to requests for assistance on forms	82%	66%
• Quality of responses to your requests	86%	-
• Quality of Energy Trust inspections	66%	71%
• Quality of your relationship with Energy Trust inspectors	75%	71%
• Overall satisfaction with Energy Trust staff	79%	63%
• Firms responding	38	8

In the area of payment processing and program paperwork approval ratings remain relatively low especially in comparison with overall approval ratings. Energy Trust is addressing these issues in multiple ways:

- Energy Trust is looking at specific forms that are associated with longer processing times to determine how the paperwork can be simplified
- Energy Trust is planning on developing metrics once the new ISP is implemented in 2011 to track processing times better
- Some programs are considering piloting immediate payment processes in certain programs

Residential and Commercial Product Findings

In the residential market trade allies' responses have indicated that some markets are changing. In the gas furnace market the majority of reported installations (90%) are condensing furnaces and over 80% of the total are >95% efficient furnaces. A similar trend in heat pumps was seen with the majority of heat pumps being installed were ≥9.0 HSPF (60%). With windows the market has also shifted with the majority of windows installed being U 0.30 or better. The reported availability of even more efficient windows has also increased.

In the commercial market 32 lighting trade allies responded indicating that high performance T8's T5s and CFLs made up the majority of their installations. However LED fixtures are becoming more prevalent (7%) in the market. Improvements could be made in the area of controls as many systems appear not to be installed with controls. Almost half of the systems are reported to have some form of occupancy sensor and a smaller number (10%) have dimming controls.