MEMO

Date: August 29, 2012
To: Board of Directors
From: Sarah Castor, Evaluation Sr. Project Manager,
Tom Beverly, Trade Ally Network Manager
Subject: Staff Response to the 2012 Trade Ally Survey

The 2012 Trade Ally survey was the eighth annual such survey Energy Trust has conducted. Initially a short survey to gather feedback about communications and incentive offerings in 2005, the survey has grown to include questions on tax credits, trade ally roundtables, the Energy Trust website, sector specific technologies, and other subjects of interest. The web-based survey was distributed to Energy Trust trade allies (with the exception of real estate allies) via email in late March 2012, and a link to the survey was also made available on the Trade Ally web pages.

In general, results from the 2012 survey were very similar to those in 2011. Over 190 unique firms were represented in the responses, offering energy efficiency and renewable energy services and serving all market sectors.

Trade ally satisfaction with Energy Trust is up about five percentage points over last year, to 82 percent giving a rating of “satisfied” or “very satisfied” with their overall experience with Energy Trust (on a 5 point scale). Most notably, satisfaction with response times to requests for information or assistance is up 20 percentage points, from 57 percent in 2011 to 77 percent in 2012. Trade ally interest in training opportunities and support remain at about the same level as 2011.

For future surveys, the evaluation contractor recommended that questions about specific measures or technologies be removed from this survey. The recommendation has several factors behind it, including the small sample sizes and unscientific nature of the survey, and the length that measure specific questions add to the survey overall. We agree with this recommendation, and for future surveys we plan to significantly shorten and simplify the survey, so that it yields more new and actionable findings for communications staff, and takes less time for respondents.

Trade ally staff use the general feedback and specific comments to plan trade ally training and events, improve communications, and aid in goal setting each year. Based on recommendations from the survey, trade ally staff will focus on:

- Providing more communications via email directly from program staff
- Further refining roundtable content, scheduling and locations to provide more value to attendees

- Providing continuing education credits for program or technical training
- Offering more question and answer sessions about Energy Trust programs and processes
- Developing webinars to expand the frequency and types of trainings offered to trade allies
- Continuing to migrate forms to an online format
- Reviewing customer feedback about residential contractor star-ratings and refining the rating system if necessary

Since the measure-specific questions are still of interest for tracking markets and planning programs, but a more scientific sample is desired, Energy Trust will contract with an evaluator to gather this information as a separate effort. This will likely involve phone surveys with a representative sample of trade allies for technologies of interest.

research/into/action inc

Final Report

2012
Energy Trust of Oregon
Trade Allies Survey

Funded by:

EnergyTrust of Oregon

Prepared by:

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E EXECUTIVE SUMMARY

This report provides the results of the eighth annual Energy Trust of Oregon (Energy Trust) Trade Ally Survey. The main goal of this study is to characterize trade allies and contractors working with Energy Trust and to gather feedback of various offerings trade allies receive from Energy Trust.

The web-based survey was distributed to over 1,400 trade allies through email invitations, banner ads on Energy Trust's website, and advertisements in other channels. A monetary incentive was offered. After a five-week fielding period, 194 unique trade ally firms responded (13.6% response rate). Although the survey was offered to the entire population of trade allies, the low response rate suggests the possibility of self-selection bias, and in fact, large firms were somewhat over-represented in the sample. We applied weights based on firm size to survey items that investigated market penetration of specific energy-efficient technologies to develop more realistic estimates of penetration.

The following are the highlighted findings, conclusions, and recommendations:

Economic Impact of Energy Trust Programs on Business

- A large majority of the trade ally firms (90%) said that Energy Trust programs had positive economic impacts on their business in 2011. Renewable trade allies reported experiencing slightly higher positive impacts than those in the residential and commercial and industrial (C&I) sectors.
- Half of the trade ally firms (50%) expect that Energy Trust projects will account for a greater proportion of their total project volume in 2012.

Paperwork

- Most of the trade ally firms (80%) reported completing Energy Trust paperwork for a majority of their customers. This finding was highest among trade allies in the renewable and C&I sectors; 68% and 50% of the trade allies in these sectors said they always complete all of their customers' paperwork.

Tax Credits

- Twelve percent of the residential trade allies and 8% of those in the C&I sector reported they were not aware of the Residential Energy Tax Credit (RETC) or Business Energy Tax Credit (BETC).

- More than half of the respondents were aware of some recent changes to the BETC, but 44% did not know specifics of the changes. Almost half of the trade allies in the C&I or renewable sectors who were aware of the change (47% and 45% respectively) said those changes had had a moderate to significant effect on their business.
- About three-quarters of the trade allies across all sectors reported that they "often" or "always" mention the tax credits to their customers. Only half of the C&I sector trade allies said they mention tax credits "often" or "always."

Financing

- Three-quarters of trade allies (73%) were aware of the financing programs, including Green Street, but a majority of them do not actively promote them.

Serving SW Washington

- Almost one-quarter of the trade allies (23%) indicated they actively offer Energy Trust services to customers in Southwest Washington, which is a slight increase from last year (19%). They identified two main barriers to increased participation in that area: their customers' lack of awareness of Energy Trust and the limited number of Energy Trust incentives available in Washington.

Relationship with Energy Trust

- Trade allies' overall satisfaction with Energy Trust has increased, from 77% last year to 82% this year. Their satisfaction with the time it takes Energy Trust to respond to requests for assistance increased more significantly, from 57% in 2011 to 77% in 2012.

Training and Support

- Trade allies rated cooperative advertising and measure-specific technical training as the support they most need from Energy Trust.
- In the area of training, trade allies expressed the greatest interest in savings calculation tools and energy modeling. A large percentage of residential trade allies (61%) reported they would like to receive training in savings calculation tools. C&I and renewable trade allies were most interested in energy modeling (54% and 67% respectively). One-half (50%) of renewable trade allies said that they would benefit from training about how to calculate customer incentives.

Roundtables

- Sixty-seven percent of the trade allies reported they participated in the roundtables in 2011. C&I trade allies' attendance was the highest (75%), while renewable trade allies'

attendance was the lowest (52%). More than half of the roundtable attendees rated the value of the roundtables as at least "somewhat useful."

Insider Newsletter

- More than three-fourths of trade allies (84%) receive the *Insider* newsletter. Most trade allies reported reading at least one article and following links to training information and areas of personal interest at least half the time. The majority of trade allies reading this publication find it at least "somewhat useful."

Website

- Almost all trade allies (91%) use the Energy Trust website at least monthly. Most of them are visiting pages that have program forms, information about program incentives, and general program information. Generally, trade allies are satisfied with the usefulness of the website.
- Three-quarters of trade allies indicated that they use a Smartphone (76%). A large proportion of them were interested in an Energy Trust app, particularly one that provides program information or requirements, or savings calculations tools.

Star Rating

- Three-quarters of all of the trade allies (74%) were aware of the Energy Trust Star rating system. Renewable trade allies were least aware of the rating system (50%).
- Opinions about the fairness of the Star rating are mixed: 63% said it is fair, while 37% said it is unfair. The most common suggestion for improvement was to base the rating on job quality, not quantity.

CONCLUSIONS AND RECOMMENDATIONS

Conclusion 1:

A majority of the trade allies reported positive experiences working with Energy Trust, and that Energy Trust programs had positive economic impacts on their business. In addition, most of these trade ally firms expected that Energy Trust programs would continue to act as a reliable source of project leads. The Star rating system continues to be a concern, since many perceive that it does not properly incentivize high-quality work. It is important for Energy Trust to continue exploring better rating systems that can best leverage trade allies.

Conclusion 2:

It is important that Energy Trust tailor the types of support it provides to meet the unique needs of each trade ally sector. Trade allies in all sectors exhibited a need for training on Oregon's RETC and BETC tax credits. These tax credits make projects more affordable and it is important that trade allies actively promote them along with Energy Trust incentives.

Conclusion 3:

It is difficult to draw meaningful conclusions regarding the measure-specific market research component because an extremely low percentage of surveyed trade allies had installed many of the study's target equipment. Our attempt to reduce survey burden by reducing the number of questions per respondent limits our ability to increase these percentages. In addition, even with equipment types with higher incidences, possible self-selection bias may reduce the ability to generalize results accurately to a larger population.

Recommendation

Narrow the scope of this study by including questions that are applicable to most trade allies only and omitting the measure-specific market research component.