# *Final Report*

# 2011 Energy Trust Trade Ally Survey

## *Prepared For:*

**Energy Trust of Oregon**

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# EXECUTIVE SUMMARY

This report summarizes the results of the 2011 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 seventh year, the survey is still focused on feedback but also includes a program/measure-specific market research component introduced in 2010. 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 2011[1] Trade Ally Survey was sent via email to 1,404 trade allies when it was launched on April 14, 2011. Links to the survey also were provided on the Energy Trust website and in the *Insider* newsletter. The survey was closed May 2, 2011 with 214 complete surveys by unique respondents – 175 in response to the email and 39 completed through the links to the website and newsletter. The response rate to the email was 12.5%, which fell short of last year's rate of 18%, but exceeded previous years' rates.

About 18% of the completed surveys were submitted via the links to the website and newsletter. It is not known, however, how many of those respondents would have completed the survey in response to the email invitation if they had not done it via web link, and so we cannot determine whether or how much the addition of those channels added to the total volume of completions.

Of the completed surveys, 22 were removed from the data set because of more than one respondent representing the same company, the same respondent completing the survey multiple times, or a respondent had not participated in Energy Trust programs in 2010. The final analysis included 192 responses.

## KEY FINDINGS & RECOMMENDATIONS

### General Trade Ally Findings

Of the 192 respondents representing unique firms, 105 reported themselves as mainly working in the Residential program, 32 in the Commercial, 8 in Industrial, 20 in Solar PV, and 9 in other renewables. 18 respondents categorized themselves as 'Other'.

#### *General Program Demographics*

Nearly half of trade allies indicated that they have been working with Energy Trust for more than five years, 7% for less than one year. Twenty-seven percent of respondents received over half of

[1] To clarify confusion with the nomenclature, the 2011 report covers the 2010 program year.

their revenues from projects involving Energy Trust incentives, and half of respondents expect an increase in the proportion of projects that involve Energy Trust in 2011.

### *Program Interaction*

Ratings of the influence of Energy Trust incentives in moving projects forward differed by sector. Solar PV and commercial sector trade allies reported the highest influence ratings.

Trade allies reported a high level of involvement in customer paperwork. Three-fourths of trade allies reported completing most or all of the paperwork for their customers at least 75% of the time. Top management and administrative staff are most involved in completing the paperwork in most sectors; the most common reason cited for not completing customer paperwork was that the customer preferred to do it.

### *Oregon Tax Credits, Green Streets, and EBIX*

Trade ally awareness of the Oregon Business and Residential Energy Tax Credits is near universal, with only 11% 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. A majority of trade allies (69%) are aware of the program and 18% of all trade allies actively market it.

#### 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. Energy Trust anticipates moving to an in-house tracking system once the new Integrated Solutions Program (ISP) has been implemented in 2011. About three-fifths of trade allies reported having had interactions with EBIX in the past year, of whom just over two-fifths reported some complaint.

### *Energy Trust Support*

Trade allies were asked to rate their interest in various types of Energy Trust support. Trade allies indicated interest in cooperative advertising (72% were "interested" or "very interested") and in furthering their knowledge of energy efficiency products, services, and programs, especially in their own trade, through regular updates, conferences, and workshops (the percentage indicating "interested" or "very interested" ranged from 48% to 59%).

### *Training*

Over two-thirds of responding trade allies reported that they had attended an Energy Trust sponsored training session in 2010 or 2011, and over 60% of these trade allies found the trainings ”valuable” or ”very valuable.”. When asked what specific areas they would most like training in, the most common responses were savings calculation tools, business development, and communicating the value of energy efficiency to customers. Three-fourths of trade allies indicated that they would be “likely” or “extremely likely” to attend webinar training.

#### Recommendation

- ➡ Continue training programs that support trade allies’ efforts to work with the programs and market their services to customers.

### *Roundtable Discussions*

Two-thirds of respondents indicated that they had attended a roundtable discussion (80% in past year) and 48% reported that the events were either “useful” or “very useful.” Seventy percent of trade allies supported trade-specific roundtables.

#### Recommendations

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

### *Communication & the* Insider *Newsletter*

A majority of responding trade allies prefer to be notified about program updates via email from program staff at least once a month. Seventy-nine percent of responding Trade Allies reported they receive the *Insider* newsletter, and a majority (70%) found it to be at least ”somewhat useful.” Over half of respondents who receive the *Insider* report reading complete feature articles and following links at least half the time. The topics rated most useful include Energy Trust program updates and common problems and solutions. A majority of trade allies (66%) who reported receiving the *Insider* said that its advance notice of program changes was sufficient.

#### Recommendations

- ➡ Continue offering the Insider as an electronic publication.

- Continue to utilize email and other electronic communication avenues to communicate with trade allies.

### *Website*

Nearly all respondents (92%) reported they visit Energy Trust's website at least once a month, most often visiting the program forms and incentives pages. Ratings of the ease of navigation continue to be low, with less than half (38%) of respondents rating it "easy" or "very easy." Roughly two-thirds of respondents were aware of the trade ally portal and the "for allies" link on the website. Over half of respondents said they would "probably" or "definitely" use an Energy Trust laptop or Smartphone app.

#### Recommendations

- Attempts should be made to increase awareness of trade ally-specific resources on the website, and to increase their ease of navigation.
- In further efforts to upgrade the website a priority should be given to the forms and program incentives pages.

## PROGRAM SATISFACTION

Overall satisfaction levels of respondents reported by trade allies remained relatively stable in both the efficiency and renewable energy sectors.

**Table 1: Trade Ally Satisfaction with Energy Trust**

| ELEMENT | SATISFACTION RATING OF '4' OR '5' ON FIVE-POINT SCALE | | | |
|---|---|---|---|---|
| | ENERGY EFFICIENCY | | RENEWABLES | |
| | 2011 (n = 145) | 2010 (n = 217) | 2011 (n = 27) | 2010 (n = 38) |
| **Overall satisfaction with Energy Trust** | 74% | 73% | 78% | 79% |
| **Knowledge of Energy Trust programs and procedures** | 80% | 80% | 85% | 84% |
| **Interactions with Energy Trust staff** | 77% | 77% | 81% | 87% |
| **Quality assurance/quality control process** | 68% | na | na | na |
| **Quality of responses to your requests** | 68% | 74% | 81% | 86% |
| **Response times to requests for information** | 66% | na | 70% | 72% |
| **Response times to requests for assistance on forms** | 57% | 73% | na | na |
| **Turnaround time for incentive application/approval of paperwork** | 56% | 61% | 67% | 55% |
| **Incentive payment processing time** | 53% | 59% | 48% | 53% |

| ELEMENT | SATISFACTION RATING OF '4' OR '5' ON FIVE-POINT SCALE | | | |
|---|---|---|---|---|
| | ENERGY EFFICIENCY | | RENEWABLES | |
| | 2011 (n = 145) | 2010 (n = 217) | 2011 (n = 27) | 2010 (n = 38) |
| **Quality of your relationship with Energy Trust inspectors** | na | na | 63% | 75% |
| **Scheduling of Energy Trust inspections** | na | na | 62% | na |
| **Quality of Energy Trust inspections** | na | na | 58% | 66% |

Note: "na" indicates "not asked."

In the area of payment processing and program paperwork, approval ratings remain relatively low, especially in comparison with overall approval ratings. Energy Trust continues to examine way to improve processing ease. Specific forms that typically have longer processing times are being examined to determine how the paperwork can be simplified. Finally, Energy Trust is planning on developing metrics, once the new ISP is implemented in 2011, to track processing times better. Energy Trust is attempting to elicit more detailed and specific trade ally feedback on program paperwork to assist it in address this issue.

## RESIDENTIAL AND COMMERCIAL PRODUCT FINDINGS

In the residential market trade allies' responses have indicated that some markets are continuing to change. In the heat pump market, the majority (72%) of heat pumps being installed are ≥9.0 Heating Seasonal Performance Factor (HSPF), up from 38% in 2008. The windows market is also continuing to shift, with a vast majority of windows installed having a U factor of 0.30 or better. The reported availability and contractor knowledge of highly efficient windows (U < 0.26) has also increased.

In the commercial and industrial markets, 26 lighting trade allies indicated that high performance T8s, T5s and CFLs made up the majority of their installations. Additionally, LED fixtures are continuing to become more prevalent in the market. Room for improvement continues to exist in the area of controls: many trade allies report installing occupancy sensors in some of their projects, but far fewer report regularly installing other types of lighting controls.