

Understanding our Underserved Majority:

Using end-to-end research to decode the
nuances of the nonparticipant experience

Alongside the rise of utility clean energy mandates, calls for the equitable distribution of energy efficiency services are also growing, underscoring the need to understand nonparticipants who warrant exceptionally thoughtful research to illuminate paths forward for service.



The Challenge

As utilities and program administrators race towards decarbonization, one thing is clear: our industry cannot achieve its ambitious climate goals without greater levels of customer participation. Those who need these programs the most—and often live in less efficient housing—are the least likely to participate. Which begs the question, how do we identify the needs of customers who are not engaging with us?

Undeterred by this challenge ILLUME knocked on more than 500 doors and sat in the lobbies of community organizations waiting for the opportunity to interview customers to help the Massachusetts Program Administrators answer one pressing question: Who are we missing in our programs and services, and why? Below are our findings of what happens when we reject monolithic thinking, and listen to customers' lived experiences to find out what matters most to them.



The Results

ILLUME led what was perhaps the most rigorous customer research study conducted in [Massachusetts](#) to identify non-participants and their reasons for not engaging in energy efficiency offerings. The research specifically targeted renters, moderate-income customers, and households where English proficiency presented a barrier to participation. Through over 1,600 surveys that were enhanced by a host of in-person interviews, we found consistent trends across non-participants, and discovered that many of the barriers to participation were far more nuanced and specific to customers' specific situations. Though it may be time-saving and convenient to think of non-participants in broad strokes, ILLUME uncovered myriad expressions of non-participation. **In this case study we focus on five variations on the non-participant experience.**

Families concerned with more pressing needs

These families were concerned with more pressing basic needs and “energy efficiency”; “home improvements” did not feel pressing to them. These households prioritize day-to-day fundamentals like food, shelter, and childcare over anything else. To this customer segment, signing up for a utility program is a luxury they can’t afford: a luxury of time, headspace, and, in many cases, finances. When compared to their everyday needs, many see energy efficiency as less important, or *even irrelevant*, to their lives.

WHAT WE HEARD:

*“Energy Efficiency?
I have more important
things to worry about.”*

Customers who are aware, but do not understand, MassSave and how it relates to their lives

We found considerable research that showed high awareness in MassSave, but limited evidence of how this awareness translates to participation – or lack thereof. Our research expanded our understanding of this lesser-understood barrier by highlighting that (1) There were many customers for whom the offer was unclear (2) Customers expressed interest, but had little understanding of how the process or program would affect them, and (3) There are customers who believe the energy efficiency, or program offerings are irrelevant for a host of reasons, including assumptions related to qualifications and home efficiency.

WHAT WE HEARD:

“I have no clue how MassSave or energy efficiency are relevant to me.”

Those who lack trust in institutions and outsiders

Some individuals perceived energy efficiency programs as a type of government program. In some cases, this created credibility that could lead to increased participation. In others, this perception created skepticism, particularly for customers who hold negative beliefs about, or experiences with, government agencies. One type of non-participant group, undocumented individuals or people who live in communities with undocumented individuals, expressed fear over providing identifying information. More generally, other customers expressed mistrust due to negative experiences with outsiders, a distrust of people unknown to themselves or their community, and fear of scams or malintent.

WHAT WE HEARD:

“I don’t trust a governmental organization such as my utility.”

Those who lack understanding throughout the process, are afraid of being taken advantage of

While many voiced uncertainty related to the process, residents with limited English proficiency (LEP) especially noted this uncertainty and a fear of being taken advantage due to a lack of understanding of what they’re being asked to sign up for (and how it benefits them). Secondly, the customer journey is not often designed for end-to-end support. Customers expressed feeling intimidated by the idea of navigating a multi-step process feeling unfamiliar with the offerings. For example, a program may offer marketing messages in languages other than English, but residents with LEP may face a need to schedule appointments, speak with contractors, or fill out applications or paperwork to participate—subsequent tasks that often lack options in multiple languages.

WHAT WE HEARD:

“What does the process look like for me?...How do I know I can trust that process?”



Renters looking to their landlords to take care of their own buildings

These households—often renters moving from place to place—do not make upgrades because they do not own their home and do not believe it is their responsibility to improve their home. Many renters expressed reluctance or discomfort asking their landlords for improvements, they distrusted their landlords, or conveyed cynicism, saying it was unlikely their landlords would do anything beyond making the minimum repairs to their properties. Though, to put things in perspective, small and mid-size property owners cited the decision to participate in an energy efficiency program was more about a return on investment. And none of property managers in this research indicated that they were the primary decision-maker on energy efficiency program participation at the properties they manage.

WHAT WE HEARD:

“Don’t ask me about home improvements, that’s not my responsibility.”

The Takeaway

Understanding the hard-to-reach takes a focused and intentional research approach to meet customers where they are at, even if it means knocking on more than 500 doors. Here are some of the findings we uncovered when we checked monolithic thinking at the door.

Embrace nuance. To successfully serve your customers challenge your organization to move away from the segment-based approach of characterizing customers by demographics. Recognize all their shades of gray and color.

Be thoughtful when reaching nonparticipants. Intentionality, along with creative planning and resources is key to ensure benefits reach disadvantaged communities and serve traditionally harder-to-reach customers.

Gain greater resolution with ethnographic research. To really dive into survey themes, employ qualitative ethnographic research to hear and see insights that may not fit in our box of common understanding.

Be aware of context. Deep, community-based research is needed to investigate customer barriers of non-participation.

Customize your research. There is no such thing as an off-the-shelf study that will answer the right questions. Research focused on understanding the nonparticipant experience needs to be customized and focused on where the work can provide the greatest insight.

As our industry pursues a more equitable distribution of energy efficiency services it is tempting to over rely on one aspect of customer identity—socioeconomic status, race, language, age—as a convenient lever to turning nonparticipants into energy efficiency users. Acknowledging that the experiences of the hard-to-reach are unique, nuanced, and diverse, utilities and program administrators can look to ILLUME’s work in Massachusetts for ideas on how intentional research can shed light on the lives of customers who may yet want an opportunity to participate in our clean energy future.

How We Did It

Establishing trust with community leaders was key to embarking on this deep and broad multi-method project that included community interviews as an essential component of the research. Below are some of the touchpoints and engagement strategies we used to support the Massachusetts Program Administrators to reach non-participants, from first point of contact to the customer front door:

Web survey: ILLUME invited sampled households to participate in a web survey through email (where email was available) and sent advanced letters to all sampled respondents. A week-and-a-half after the web survey was open, second reminder invitations were sent to non-responders. The web survey remained open for the entire field period.

Telephone survey: The research firm attempted to reach nonresponding households via telephone. Given the importance of nonparticipants, the team focused attention on nonresponding nonparticipants.

Abbreviated mail survey: A mail survey was sent to households that did not respond to the web or telephone effort. To maximize response, this mail survey became an abbreviated version of the web/telephone survey, asking the most critical demographic and awareness questions, and included \$5 as a pre-incentive.

In-person, door-to-door survey: ILLUME selected nonresponding nonparticipants from the eight lowest-responding (and participating) census tracts for door-to-door visits. Postcards were left at homes when target respondents did not answer the door, or were not home, letting them know the evaluation team was there and offering a telephone number to contact to complete the survey.

In-person intercept interviews: We conducted more than two dozen door-to-door interviews with household respondents who let us into their homes to discuss perceptions, understanding, and participation in Mass Save programs.

Follow-up telephone interviews: In order to dig deeper and understand the stories behind customer barriers, ILLUME completed a series of follow-up, in-depth phone interviews.

Community organization interviews: We conducted a series of intercept interview with customers at two community organizations in the Boston area. Questions focused on Mass Save awareness, household needs, and learning about customers' trusted resources.

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