



MEMORANDUM

To: Nick Warnecke, AIC; Nic Crowder, AIC; Nida Khan, CAMI Energy; Seth Craigo-Snell, SCS Analytics; and Elizabeth Horne, ICC Staff

From: The Opinion Dynamics Evaluation Team

Date: March 5, 2025

Re: Small Business Direct Install Channel Trade Ally Satisfaction Research

INTRODUCTION AND KEY FINDINGS

As part of the 2024 evaluation of the Ameren Illinois Company (AIC) Small Business Direct Install (SBDI) channel, Opinion Dynamics conducted research with participating trade allies to estimate spillover associated with the channel. In addition to this objective, the evaluation team also asked trade allies who participated in the channel to answer a battery of questions to understand their satisfaction with the channel and its elements.

DATA COLLECTION AND SAMPLING METHODOLOGY

The following sections include information on how the evaluation team collected data to understand trade ally satisfaction with the SBDI channel.

Trade Ally Research

The evaluation team conducted a web survey with trade allies who participated in AIC's SBDI channel between January 2023 and June 2024. The channel's tracking data corresponding to the periods previously mentioned included projects associated with 126 unique participating trade ally companies. Of them, 102 companies had one or more contacts associated with them. For the purposes of the survey, the evaluation team worked with a sample frame of 105 unique trade ally contacts with an email address available on file. Following a census sampling approach, the evaluation team created a sample composed of all 105 trade allies with an available email address.

As part of the outreach strategy, the evaluation team sent out an initial email invitation to trade allies in the sample, and two follow-up emails. The survey was fielded throughout July and August of 2024. We received 34 valid responses to the survey, for a 32% response rate.¹ Table 1 shows the percentage of electric energy savings captured in the sample and the survey responses.

¹ We received 35 total responses to the survey; one respondent did not pass the screening criteria to complete the survey.

Table 1. Representation of Savings in the Sample and Survey Completes

Population		Sample		Survey Completed	
n	Total kWh Savings	n	% kWh Savings	n	% kWh Savings
129	84,436,616	105	86%	34	37%

Note: The population values are based on the total of projects with a trade ally company associated with them, regardless of whether an individual trade ally contact was available.

In addition, the evaluation team conducted a brief additional interview with one trade ally who reported significant levels of spillover, to confirm the validity of their responses and to explore the root cause of the spillover.

Satisfaction Research

As part of the survey, the evaluation team asked trade allies to rate their satisfaction on a scale of 0 to 10, where 0 means “Not at all satisfied” and 10 means “Extremely satisfied”, with various program components they may have experienced as part of their participation in the SBDI channel.² The allies were surveyed about the following program components:

- The incentive amounts offered through the SBDI channel
- The process of applying for and receiving incentives through the SBDI channel
- The selection of equipment that was eligible for incentives
- The marketing/promotional tools and materials provided by AIC
- The participation requirements for their company, including data requirements
- The eligibility requirements for the businesses they serve
- The SBDI channel overall

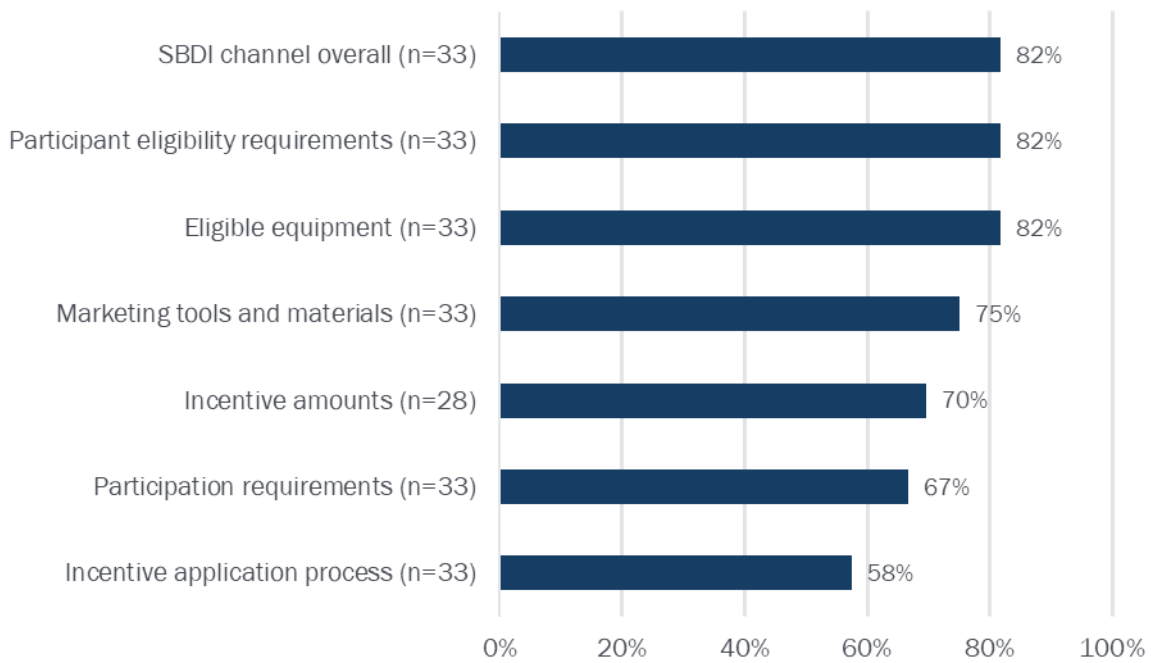
Trade allies who rated their satisfaction with a program component as less than 7 were asked to provide additional information in an open-ended follow-up question about why they were not fully satisfied with that program component.

SATISFACTION RESULTS

Figure 1 includes information on the percentage of allies that reported they were satisfied with the SBDI program overall, and each of the individual program components. Most program allies are satisfied with the SBDI channel overall (82%), as well as each of the individual program components. The fewest number of allies reported being satisfied with the application process (58%).

² Trade allies were also given the option to respond, “Not applicable”, or “Don’t know” to any of the components.
Opinion Dynamics

Figure 1. Trade Ally Satisfaction with the SBDI Channel and its Elements



Note: The figure includes the proportion of respondents who reported high satisfaction. High satisfaction is defined as providing a 7 or higher on a 10-point scale, where 0 means "not at all satisfied" and 10 means "completely satisfied". The sample sizes next to each component reflect the number of responses included in the percentage. We excluded "not applicable" and "don't know" responses from the analysis.

Two common themes that trade allies reported in their open-ended responses as to why they are not fully satisfied with specific program components were difficulties completing the incentive application (n=17) and suggestions to increase the incentive amounts (n=8). Regarding the application process, the allies noted that the paperwork and photograph requirements had become more burdensome than in previous years, requiring a significant increase in the amount of time submitting applications on behalf of customers. As for the feedback the allies provided on the incentives, some allies referenced the current state of the economy and inflationary pressures on equipment prices and customer budgets, as reasons they felt the incentive levels should be increased. However, some allies also connected the need to increase the incentives back to the challenges they were experiencing with the application process; noting that the labor costs associated with completing the application exceed the resulting incentives.

Notably, this was the experience of an ally who reported a significant level of spillover. In the follow-up interview we completed with this ally, they provided additional context as to why they had completed a significant amount of program-

"I AM FRUSTRATED WITH THE OVERALL COST/BENEFIT TO MY COMPANY OF DOING THE PROJECTS. MY TEAM PROCESSES FAR FEWER PROJECTS THAN THEY EVER HAVE IN THE PAST, DESPITE HAVING BETTER PRODUCTS, INTERNAL PROCESSES, AND PEOPLE WORKING ON DOING THESE SBDI PROJECTS. THERE WILL LIKELY COME A TIME IN THE NEAR FUTURE WHEN I NEED TO SIT DOWN WITH MY TEAM AND MAKE A TOUGH DECISION ABOUT WHETHER WE PULL BACK OUR INVOLVEMENT." – ALLY

"THE LEVEL OF EFFORT AND OVERSIGHT FOR SUBMISSIONS AND REQUESTING PAYMENT IS SO MUCH HARDER THAN IT EVER HAS BEEN BEFORE. MY TEAM IS PARANOID THAT WE WILL MAKE A MISTAKE AND HAVE TONS OF MORE CYCLES TO WORK THROUGH AND MORE PHOTOS TO LOAD, AND INSPECTIONS TO WORRY ABOUT. IF THE PAYMENTS BETTER COMPENSATED FOR ALL OF THIS TIME AND WORRY, IT WOULD BE EASIER FOR MY TEAM TO FOCUS ON THEM..." – ALLY

eligible projects but did not apply for incentives through the program. The ally reported that the snapshot program was too difficult and time-consuming to use, to the extent that the administrative costs to complete the application often offset or exceeded the incentives they received. Due to these circumstances, the ally began to refrain from informing customers with program-eligible projects about the availability of incentives. While other respondents did not report the same level of spillover as this ally (or, in some cases, any spillover at all), frustrations with the level of effort required to fulfill the application requirements is common among many of the allies.