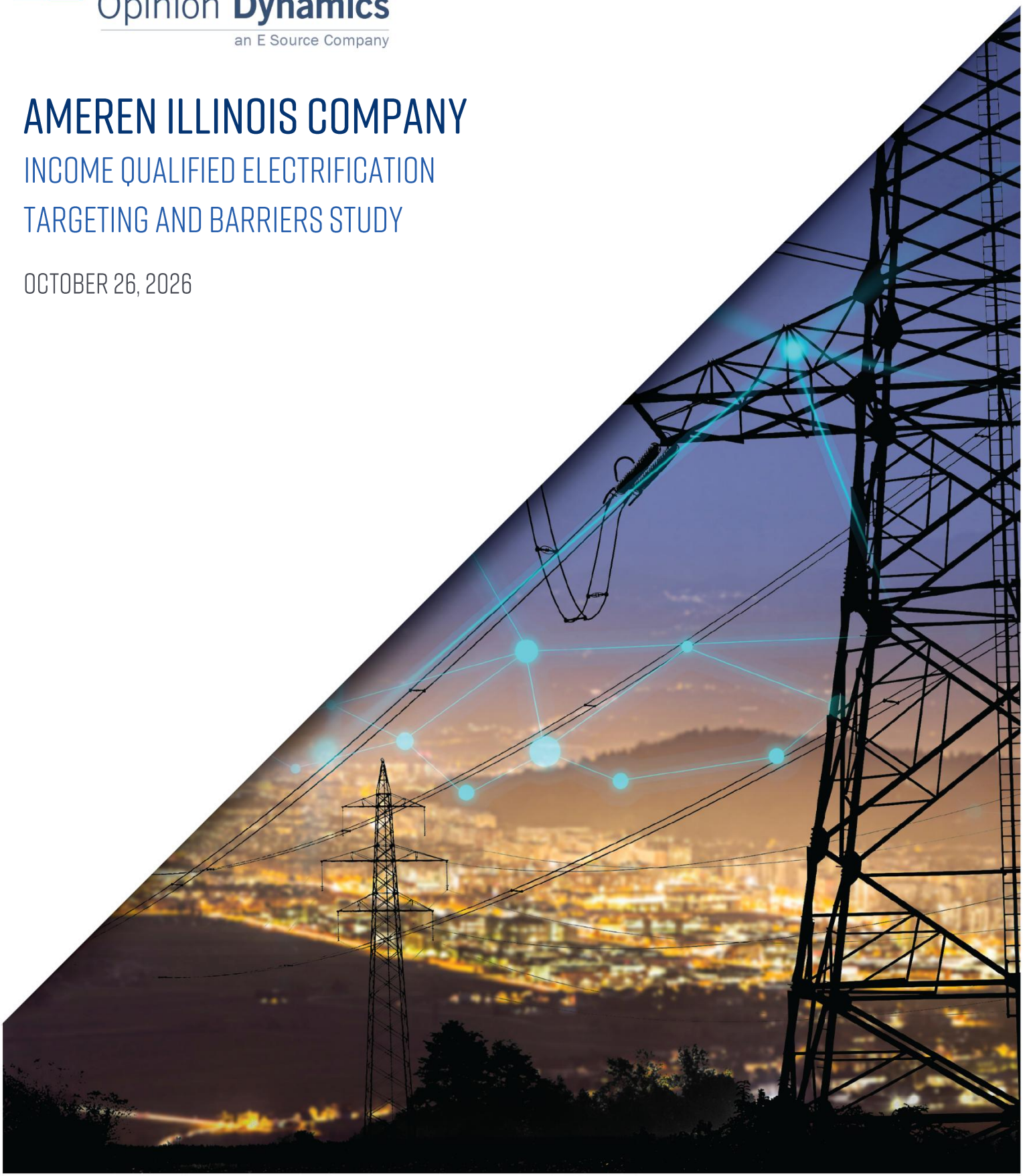
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Opinion Dynamics
an E Source Company

AMEREN ILLINOIS COMPANY

INCOME QUALIFIED ELECTRIFICATION TARGETING AND BARRIERS STUDY

OCTOBER 26, 2026



CONTENTS

1. Executive Summary 4

Methodology Overview 4

Conclusions and Recommendations 5

2. Introduction 8

2.1 Channel Description 8

2.2 Methodology 9

2.2.1 Interviews 10

2.2.2 Document Review 11

2.2.3 Nonparticipant Survey 12

3. Findings 14

3.1 Marketing Materials 14

3.2 Customer Targeting 14

3.2.1 Identification Process 15

3.2.2 Potential Improvements 15

3.3 Customer Awareness and Acceptance 16

3.4 ADDITIONAL Barriers to Electrification 25

3.4.1 Addressing Barriers 27

4. Lessons from Peer Utilities 28

4.1 Marketing 28

4.2 Customer Targeting 28

4.3 Barriers to Electrification 29

5. Conclusions and Recommendations 30

Appendix A. Implementation Team Interview Guide 33

Appendix B. Customer Survey Instrument 36

Introduction/Landing page 36

SCREENING [Ask All] 36

Demographics [ASK ALL] 42

Closing 43

Appendix C. Peer Utility Interview Guide 44

Introduction 44

SCREENING [Ask All] 44
Targeting and identification [ask all] 44
Marketing and outreach [ask all] 45
Awareness and acceptance [ask all] 46
Barriers and addressing barriers [ask all] 46
Closing 47

TABLES & FIGURES

Table 1. Summary of Data Collection and Analysis Activities 10
Table 2 Nonparticipant Survey Population and Sample 12
Table 3. Prominent Barriers and their Relative Importance 25

Figure 1. Self-Reported Familiarity with AIC's Electrification Channel 17
Figure 2. Electrification Topics Recalled from AIC Marketing Outreach (n=80) 18
Figure 3. Eligible Measures Recalled (n=80) 18
Figure 4. Postcard Included in Survey: "Get off Propane" 19
Figure 5 Email Included in Survey: "Switch from Propane" 19
Figure 6. Appeal of Marketing Materials (n=211) 20
Figure 7 Marketing Materials and Interest in Channel (n=211) 21
Figure 8. Anticipated Change in Energy Bills from Electrification (n=206) 24
Figure 9. Extent to which Ameren will keep customers' best interest in mind (n=211) 26

I. EXECUTIVE SUMMARY

The policy and programmatic context for electric energy efficiency in Illinois has shifted substantially in recent years, creating new opportunities, but also implementation challenges for utilities. The passage of the Climate and Equitable Jobs Act (CEJA) in 2021 explicitly enabled utilities to promote electrification of end uses that have traditionally relied on fossil fuels, expanding both the scope and complexity of program offerings. In response, AIC introduced limited electrification activities under their sixth Electric and Gas Energy Efficiency and Demand Response Plan, covering calendar years 2022–2025 (Plan 6), primarily focused on low-income customers who rely on delivered fuels such as propane, a population historically outside the core focus of electric energy efficiency programs. Through the Electrification Channel of their Income Qualified (IQ) Initiative, AIC began engaging income qualified propane customers to offer a suite of electrification measures at no cost to participants. The recently passed Clean and Reliable Grid Affordability Act (CRGA) will likely drive additional electrification efforts by AIC and other utilities.

To support electrification, AIC has invested in direct marketing, community-based outreach, and targeted engagement in select communities and mobile home parks, identifying tens of thousands of potentially eligible electrification customers. Despite sustained outreach and expanded channel offerings, participation has remained below expectations. This gap between effort and uptake underscores the need for a focused evaluation to better understand how current targeting, marketing, and outreach strategies are influencing customer awareness, interest, and enrollment. This study is intended to identify barriers to participation, assess the effectiveness of current approaches, and inform potential channel adjustments to improve performance in an evolving policy landscape.

This evaluation study is designed to examine the design and implementation of AIC's current outreach and targeting strategies and identify opportunities to strengthen channel performance in electrification efforts. Opinion Dynamics, in collaboration with Ameren Illinois, developed three overarching research questions to guide the study:

- How does AIC currently identify potential propane customers, and where are there opportunities to improve this approach?
- To what extent are AIC customers aware of electrification efforts, and what is the current level of customer acceptance of electrification measures?
- What barriers are limiting electrification uptake, and how are these barriers related to awareness and acceptance? To what extent could addressing these barriers increase Channel participation and improve the effectiveness of marketing and outreach efforts?

The evaluation used a mixed-methods approach to examine Channel design, targeting, outreach, and customer decision-making, including document review, an interview with implementation staff, peer utility interviews, and a survey of customers engaged by AIC who have not participated in the Electrification Channel.

In addressing these questions, the evaluation team focused on developing actionable insights and recommendations to improve channel enrollment and support Ameren Illinois in achieving its electrification goals.

METHODOLOGY OVERVIEW

The evaluation team completed the following activities:

- Implementation Staff Interview
  We conducted an in-depth, semi-structured interview with AIC and Leidos staff involved in program implementation early in the evaluation to understand current electrification efforts, including targeting approaches, marketing and

outreach strategies, eligibility requirements, and perceived barriers to participation. Findings from this interview provided foundational context for all research questions and informed survey design and peer program selection.

- **Peer Utility Interviews**
  The team interviewed staff from three peer utility electrification programs serving comparable customer populations. Peer programs were selected based on customer similarity, program maturity, and evidence of successful implementation. Interviews focused on participant targeting strategies, program design, marketing and outreach, customer awareness and acceptance, and common barriers to electrification, with the goal of identifying transferable lessons and best practices.
- **Document Review**
  We reviewed AIC marketing, education, and outreach materials used between 2023 and 2025, including direct mail, digital outreach, and program ally (PA) materials.
- **Nonparticipant Survey**
  Finally, we administered an online survey to nonparticipant customers identified by AIC as likely propane users who received channel marketing but did not enroll. The survey captured customer awareness, perceptions of marketing, attitudes toward electrification, and barriers to participation. We invited all customers who had been targeted for channel marketing to take the survey, resulting in 211 completed surveys from a population of 26,925 customers.

CONCLUSIONS AND RECOMMENDATIONS

Conclusion: Self-reported familiarity with the Electrification Channel remained relatively low, and many customers did not recall specific channel themes or covered measures after receiving targeted outreach.

Conclusion: AIC's marketing materials covered a wide range of themes, spanning financial, practical, and societal considerations, with all materials incorporating at least two of these themes. However, survey results indicated that cost concerns, including equipment affordability, electric rates, and the cost of installing new equipment, were the most salient for this population. Peer utility and AIC staff interviews further reinforced that savings and no-upfront-cost messaging were necessary (but not sufficient) for engaging income-qualified customers.

- Recommendation: While interweaving many themes showcased the breadth of electrification benefits, it risked leaving customers with a diffuse set of impressions. Consider narrowing the themes presented in materials to one to three core themes, centered on affordability and long-term savings. Additional topics, such as technology, safety, or decarbonization, can be moved to the channel website or an FAQ page for customers who want more information.
- Recommendation: Consider framing electrification as a way to avoid the financial burden of large seasonal propane purchases. Messaging could highlight the contrast between paying a large upfront sum to refill a propane tank and spreading smaller payments across the winter with electric heat. Campaigns might use direct questions to build urgency, such as, "Are you preparing for another expensive propane delivery? Switch now and avoid the big bill. Electrification makes heating more affordable and predictable." This approach links channel benefits to the customer's immediate financial situation and provides a timely incentive to act before committing to another propane purchase.

Conclusion: Customer targeting was most effective when data-driven approaches were paired with local, neighborhood-level knowledge. Across peer utility interviews, implementation staff reported data availability challenges, similar to those faced by AIC, particularly in accurately identifying household heating fuel. While peer programs employed a range of targeting methods (using administrative data, mapping tools, participation history, etc.), interviewees consistently

emphasized that neighborhood-level prioritization and trusted local channels were more effective than attempting to pre-screen individual households.

Conclusion: Efficiency and reliability of targeted outreach improved when program design allowed customers to be quickly screened, redirected to a more appropriate program, or provided alternative pathways when full participation was not feasible. This flexibility reduced staff time spent on ineligible leads, preserved customer goodwill, and enabled programs to respond to real-world housing conditions and customer readiness. AIC staff interviews similarly indicated that bottlenecks created by rigid qualification requirements can delay customer engagement and strain staff resources, suggesting that streamlining early screening and identifying appropriate pathways for customers who do not meet all program requirements could improve both targeting efficiency and customer experience.

- Recommendation: AIC should continue to rely on data-driven targeting but consider elevating neighborhood-level prioritization as a major component of its outreach strategy, particularly in areas with limited or unreliable customer-level fuel data. This approach should be supplemented by input from PAs, contractors, and community partners to refine outreach geographies over time. Incorporating local feedback loops, such as tracking which neighborhoods generate the highest assessment-to-install conversion rates, can help iteratively improve targeting accuracy while reducing reliance on imprecise household-level fuel assumptions.
- Recommendation: To address false positives and staff-reported bottlenecks in the qualification process, consider introducing low-burden early screening steps that allow rapid determination of customer fit and pathways to appropriate programs. This could include a short intake survey or pre-screening tool that captures a limited set of high-impact variables, such as primary and secondary heating fuel, housing age or construction type, income qualification status, and known electrical or space constraints. AIC may also consider reducing or deferring certain qualification requirements until later in the process, particularly those that do not materially affect early feasibility. In parallel, the channel could introduce a staggered qualification structure that allows customers to partially qualify for specific measures, assessments, or incentives before meeting full channel requirements. Together, these approaches would enable faster screening, earlier engagement, and more efficient routing of customers while reducing staff burden and preserving customer trust.[1]

Conclusion: Customers reported limited knowledge or recall of available measures and channel details beyond high-level messaging. Many customers have limited familiarity with electrification concepts and persistent knowledge gaps related to these technologies.

Conclusion: Cost concerns reduced customer acceptance and amplified other barriers to pursuing electrification. Survey responses to both closed- and open-ended questions consistently highlighted the central role of cost, particularly related to electric rates, as a key constraint on customer willingness to participate. Customers often believed electric rates would increase and continue to rise over time. Given the central role that financial risk played in respondents' decision-making, improvements in awareness or messaging alone are unlikely to produce substantial gains in participation unless concerns about the cost of electrification are credibly addressed.

- Recommendation: Acknowledge that many customers are experiencing and are concerned about rising electric costs. Build trust by validating customer experience and providing accurate energy cost estimates during channel onboarding. Consider presenting multiple cost scenarios that reflect different electric price change assumptions, while basing eligibility and qualification on estimated bill impacts under current rates to avoid introducing additional bottlenecks into the qualification process.

Conclusion: Survey respondents often expressed distrust for utilities, in part because they associated them with rising electric rates. Lack of trust likely reduced customers' willingness to believe cost projections or assurances of positive

[1] Recent staff interviews have highlighted a new "customer journey pathway" introduced to AIC's website in 2025 that allows customers to better identify which IQ offerings best fit their needs. This tool may already address some of the recommendations made here.

bill impacts. Similarly, peer utilities emphasized the importance of trust in driving participation, noting that skepticism toward savings claims and unfamiliar technologies were major barriers to overcome. In contrast, AIC staff interviews indicate that trust in propane dealers and suppliers tended to be relatively high, as these entities were often embedded within local communities and maintained visibility through non-sales activities, such as sponsoring community events or local organizations.

- Recommendation: Augment partnerships with local trusted messengers such as community-based organizations. Consider embedding their voices into marketing materials and campaigns. For example, including quotes from community organizations, co-branding with trusted local sources, and featuring testimonials from satisfied participants can help normalize electrification. Provide lawn signs to customers who have electrified and are happy with their decision, to signal to local communities that people they know and trust have electrified. Information framed by trusted messengers is often received as more credible than when it comes solely from AIC, and it positions electrification as a familiar, community-supported experience rather than an abstract utility initiative.

Conclusion: As contractors are more informed and inherently invested intermediaries who stand to profit from the channel, they may be an effective pathway for increasing customer understanding and engagement in electrification, as well as partners in simplifying the electrification process. AIC reported that the number of channel eligibility requirements and the scope of work involved can be overwhelming for customers. Peer utility program staff noted that shifting some of the burden of paperwork and technical understanding from customers to contractors (who are often more trusted than utilities), led to increased participation and customer satisfaction with the participation process.

- Recommendation: Develop a contractor support toolkit to reduce complexity and improve delivery capacity. This could include a dedicated contractor support team or enhanced internal resources to assist with complex cases, standardized scripts or talking points to help contractors explain electrification to customers, and curated lists of qualified electricians or project partners. AIC could further support cross-trade coordination by facilitating introductions, providing assurances of partner quality, and clarifying roles and responsibilities across trades.
- Recommendation: Improve contractor participation by addressing profitability and long project timelines. For contractors to actively promote electrification and invest in building the necessary capabilities, projects must be perceived as financially viable despite their inherent complexity and long timelines. Consider providing targeted incentives or participation supports to offset upfront costs, reduce risk, maintain cash flow, or improve contractor profitability. In the near term, augmenting channel delivery with contractors who already possess electrification expertise could help relieve capacity constraints while serving as proof of concept for contractors in areas without established electrification-focused firms.

2. INTRODUCTION

The policy and programmatic context for electric energy efficiency in Illinois has shifted substantially in recent years, creating both new opportunities and new implementation challenges for utilities. In September 2021, Illinois Public Act 102-0662, the Climate and Equitable Jobs Act (CEJA), was signed into law. CEJA introduced significant changes that directly affect the design, delivery, and evaluation of electric energy efficiency programs, particularly by explicitly enabling utilities to promote electrification of end uses that have traditionally relied on fossil fuels.

In response to CEJA, Ameren Illinois Company (AIC) pursued new program strategies under Plan 6 that incorporate limited electrification activities. These efforts have focused in part on low-income customers currently served by delivered fuels such as propane, a population that historically has not been a primary focus of electric energy efficiency programs. AIC expanded program eligibility to allow low-income customers with propane heating systems to transition to fully electric homes through its Income Qualified (IQ) Initiative's Electrification Channel.

The recently passed Clean and Reliable Grid Affordability Act (CRGA) will likely drive additional electrification efforts by AIC and other utilities.

2.1 CHANNEL DESCRIPTION

AIC, through its implementation partner Leidos, offers several measures to income-qualified electric customers who currently use propane as their primary heating fuel via its Electrification Channel. The Electrification Channel supports a complete transition from propane to electric energy use, primarily through the installation of high-efficiency heat pump technologies. While space heating is the main focus, additional electric upgrades may also be included to support full electrification. AIC encourages adoption of electrification measures by segmentation of potential participants, direct marketing campaigns, community-based outreach events, and, more recently, engagement with propane-dependent mobile home parks. Available measures include the following:

- Air source heat pump
- Heat pump water heater
- Electric induction stove
- Heat pump clothes dryer
- Electrical panel upgrades, when necessary to support the new electric equipment

In addition, AIC strongly encourages building envelope improvements, such as insulation or air sealing, to maximize energy savings and system performance, though they are not required for participation. All eligible measures are provided to participants at little to no cost, depending on the project scope and customer eligibility.

To participate in the Electrification Channel, customers must meet the following requirements:

- Be an income qualified Ameren Illinois customer based on household income, size, and location
- Currently use propane as the primary heating fuel
- Agree to a full fuel switch from propane to electricity (propane systems cannot remain in use anywhere in the home and cannot be retained as a backup heating source)
- Receive a positive bill impact to ensure the customer financially benefits from the electrification upgrade

In 2022, AIC identified approximately 32,600 potential single-family propane homes by identifying customers with an electric account but no AIC gas account. In 2023, AIC refined and further segmented this list of potential electrification

participants and conducted direct marketing to approximately 2,500 households identified. That same year, five communities were identified as potentially well-suited for electrification, and 55 outreach events were held within those communities.

In 2024, outreach efforts expanded to an additional 10 communities, with 45 additional outreach events conducted. By the end of 2024, approximately 38,000 customers had been identified and received direct marketing related to electrification opportunities. During this period, the Electrification Channel was also expanded to include low-income mobile home parks, and AIC staff began collaborating with mobile home park owners and operators to identify potential electrification opportunities.

Despite these sustained direct marketing and community engagement efforts, channel participation has remained below expectations. As a result, there is a need to better understand how current marketing, outreach, and targeting strategies are influencing customer awareness, interest, and enrollment, and to identify opportunities to improve channel performance going forward.

2.2 METHODOLOGY

This formative evaluation study is intended to address these priorities by examining the design and execution of outreach and targeting strategies and by identifying opportunities to strengthen channel performance as electrification efforts continue to expand. Opinion Dynamics, in conjunction with Ameren Illinois, developed three overarching research questions to guide the study:

- How does AIC currently identify potential propane customers? In what ways, if any, can this approach be improved?
- Are AIC customers currently aware of electrification efforts? What is the current level of acceptance for electrification measures among customers?
- What are the barriers to electrification efforts? Are the barriers to electrification related to awareness and acceptance? Can addressing these barriers help increase channel participation and optimize marketing and outreach efforts?

While answering these questions, the evaluation team sought to develop actionable recommendations intended to improve channel enrollment and to support AIC in achieving its electrification goals.

This report includes findings from a variety of data collection and analytical methods. Table 1 summarizes the specific data collection activities by research question. Following the table, we describe data collection and analyses.

Table 1. Summary of Data Collection and Analysis Activities

Research Question	Staff Interviews	Document Review	Nonparticipant Survey	Peer Utility Interviews
1. How does AIC currently identify potential propane customers? In what ways, if any, can this approach be improved	✓			✓
2. Are AIC customers currently aware of electrification efforts? What is the current level of acceptance for electrification measures among customers?	✓	✓	✓	
3. What are the barriers to electrification efforts? Are the barriers to electrification related to awareness and acceptance? Can addressing these barriers help increase channel participation and optimize marketing and outreach efforts?	✓	✓	✓	✓

2.2.1 INTERVIEWS

We conducted two types of in-depth, semi-structured interviews. Early in the evaluation, we interviewed AIC and Leidos staff involved in program implementation to understand the current status of AIC's electrification efforts, including targeting approaches, marketing and outreach strategies, and recruitment challenges. In addition, we conducted interviews with implementers and utility staff from peer electrification programs focused on participant targeting strategies, implementation successes, and key challenges, with the goal of identifying common barriers and informing potential future channel changes.

IMPLEMENTATION STAFF INTERVIEW

The staff interview played a foundational role in the evaluation and informed all three research questions. Opinion Dynamics analysts developed and followed a semi-structured interview guide informed by the evaluation plan and research questions. Interview topics included targeting and eligibility approaches, awareness and understanding of electrification, marketing and outreach efforts, channel design and implementation, and perceived barriers to participation, both within specific channel components and more broadly across the target population.

We conducted one in-depth virtual interview with two channel implementation staff members, one from Leidos and one from AIC. AIC identified these individuals as the implementers with the deepest institutional knowledge and the longest tenure working on the Electrification Channel. We asked follow-up clarification questions by email as needed. We conducted the interview in August 2025, at the outset of the evaluation.

After the interview, we conducted a thematic review of the interview notes to identify emergent themes and align them with the evaluation's research questions. The interviews provided critical context on channel design and implementation, clarified how implementers understood the challenges that motivated the evaluation, and offered insight into perceived barriers to participation and their underlying causes. We also used findings from the staff interviews to inform the development of survey instruments and interview protocols, and to select peer utilities for comparative analysis.

PEER UTILITY INTERVIEWS

To identify appropriate peer programs, we searched websites for utilities, industry publications, stakeholder organizations, think tanks, and nonprofit research organizations to develop a broad inventory of electrification programs nationwide. From this universe, we narrowed the list based on two primary criteria. First, we prioritized programs serving

customer bases similar to AIC's, as targeting and uptake barriers are most informative when drawn from comparably situated populations. Second, we considered program maturity and evidence of success, drawing on industry recognition, publications, and awards to identify programs likely to offer transferable best practices. Using publicly available contact information and internal industry networks, we reached out to program implementers and utility staff at six of the peer utilities. Opinion Dynamics analysts interviewed staff from three of the six programs contacted who were available and willing to participate.

As with the staff interviews, the evaluation team developed and used a semi-structured interview guide informed by the evaluation plan, research questions, findings from the AIC staff interviews, and our background research on peer programs. Interview topics included the following:

- Targeting and identification of potential participants
- Program design, implementation, and key features
- Marketing and outreach strategies
- Customer awareness and acceptance of electrification
- Barriers to electrification and strategies used to address them

All interviews lasted approximately one hour. We conducted the interviews virtually, recorded them with participant consent, and documented them through detailed notes and transcripts. We conducted interviews between October and December 2025. After completing data collection, we conducted a thematic analysis across interviews to identify emergent themes within and across programs. We mapped these themes to the evaluation's research objectives and synthesized them to inform findings and develop actionable recommendations. We report findings in aggregate to preserve the confidentiality of participating programs.

2.2.2 DOCUMENT REVIEW

MARKETING, EDUCATION, AND OUTREACH MATERIALS

Another aspect of this evaluation was a review of the marketing, education, and outreach (ME&O) materials used by AIC to recruit, inform, and engage channel participants and PAs. Opinion Dynamics requested all ME&O materials used by the channel since its inception. In response, channel implementers provided 15 ME&O materials used between June 2023 and May 2025, including digital copies of postcards, direct mail, email outreach, and presentations developed for PAs.

Opinion Dynamics analysts conducted a structured qualitative review of the materials provided. First, analysts compiled an inventory of all channel-related marketing and educational materials and documented key descriptive information for each item, including the material title, intended audience, thematic focus, and a brief description of content with attention to alignment with overall channel goals. When multiple versions of an item were available (e.g., AIC sent slightly different postcards over time), analysts examined changes over time to identify common themes, shifts in messaging or design, and opportunities for improvement. We summarized suggested refinements at a high level rather than providing detailed, line-by-line edits.

REVIEW OF TARGETING APPROACH

We also asked AIC and implementation staff to provide any existing documentation describing how they targeted potential propane customers for Electrification Channel marketing. In this context, targeting refers to the process used to identify customers who are likely eligible for the channel, which requires accurately determining whether customers meet income eligibility requirements, are current AIC electric customers, and use propane as their primary heating fuel.

However, AIC indicated that no formal documentation of the targeting strategy existed. In the absence of written documentation, Opinion Dynamics relied on our in-depth staff interview (described in the Implementation Staff Interview section) to understand historical and current targeting practices. This interview provided detailed information on the various approaches AIC has used to identify potential propane customers, how those approaches evolved over time, and how implementers assessed the effectiveness of different targeting strategies. The information provided was comprehensive and detailed enough for evaluators to fully understand the targeting process and to identify potential areas for improvement based on the evaluation findings.

2.2.3 NONPARTICIPANT SURVEY

To better understand participation decision-making, perceived barriers, and preferences among AIC's target population, we administered a survey to customers who did not enroll in the channel despite receiving marketing outreach. The population of interest consisted of AIC electric customers without a gas account who resided in areas not served by an alternative gas utility and were therefore likely propane users, all of whom AIC had sent virtual (e.g., emails) and physical marketing collateral (e.g., mailers). This population included 26,925 customers.

Given historically low response rates for surveys of similar populations, we took a census approach by inviting all identified customers to participate. In total, 211 customers completed the survey, yielding a response rate of 0.8%. Given the low response rate, survey results should not be considered generalizable to all program nonparticipants. We fielded the survey online via Qualtrics between November 24 and December 14, 2025, reaching out to each person in the population three times. We provided each survey respondent a $10 e-gift card to thank them for their participation. Table 2 summarizes the survey population and respondent sample.

Table 2 Nonparticipant Survey Population and Sample

Survey Information	Summary
Population	26,925
Sample Size	211
Response Rate	0.8%
Fielding Period	11/24/2025–12/14/2025
Average time to complete	14 minutes

We designed the survey to capture the perspectives of potential channel participants who were exposed to channel marketing but had not enrolled. Survey content focused on respondents' awareness of the channel, recall and perceptions of marketing outreach, attitudes toward electrification and its perceived benefits, and reactions to channel messaging and materials. After being reminded of key channel features, respondents were also asked to identify barriers to participation specific to this channel. Collectively, these topics provide insight into how AIC's target customers interpret and evaluate channel marketing, how messaging influences decision-making, and what factors may discourage participation, including perceptions of electrification and electric heating relative to propane-based heating systems.

The following section summarizes respondent demographics. The sample skewed heavily toward homeowners, with 94% of respondents owning their home (Table 3).

Table 3. Survey Respondent Homeownership Status (n=211)

Homeownership Status	Number of Respondents	Proportion of Respondents
Own Home	199	94%
Rent	8	4%
Prefer not to answer / Other	4	2%

The survey also requested that respondents identify their home type. Options included single-family detached (a standalone home that does not share walls with other units); single-family attached (a home that shares one or more walls with neighbouring units, e.g., duplex); apartment building or condo with two to four units; mobile, manufactured, or prefabricated home; and other. The distribution remained highly concentrated, with 91% of respondents living in a single-family detached home (Table 4).

Table 4. Survey Respondent Home Type (n=211)

Type of Home	Number of Respondents	Proportion of Respondents
Single-family detached	191	91%
Single-family attached	4	2%
Mobile, manufactured, or prefab home	10	5%
Other	3	1%
Prefer not to Answer	3	1%

Respondents most commonly lived in two-person households, with over half reporting a household size of two. One-, three-, and four-person households were also relatively common responses (Table 5).

Table 5. Survey Respondent Household Size (n=211)

Household Size	Number of Respondents	Proportion of Respondents
1	22	10%
2	110	52%
3	30	14%
4	30	14%
5	6	3%
6+	11	5%

Finally, respondents reported on the primary language spoken at home. English was the only language explicitly reported, accounting for 97% of the sample (205 respondents). The remaining respondents preferred not to answer (6 respondents). Overall, the sample consisted of English-speaking homeowners living in single-family detached homes, with household sizes generally ranging from one to four people.

3. FINDINGS

This section summarizes the data, findings, and outcomes that emerged from the evaluation activities described in the previous section. We completed activities between July and December 2025. This section organizes findings by key topic areas.

3.1 MARKETING MATERIALS

As a preparatory step for the study, the Opinion Dynamics team reviewed AIC's marketing collateral used to engage likely propane users about the Electrification Channel. See Figure 4 and Figure 5 below for examples of typical marketing collateral sent to recruit customers for electrification. Our review of these materials found 10 themes, which fell into three categories:

Table 6. Marketing Themes by Category

Theme
Category: Financial
Little to no cost
Saving money and affordability
Energy Efficiency
Category Practical
Convenience
Reliability and dependability
Advanced Technology
Category: Societal
Safety
Fuel Switching
Decarbonization
Collaboration

Marketing materials incorporated messages from two to six of these themes. Furthermore, the materials often explained why customers might consider electrifying and how to get started with the channel, such as by using a QR code or a link to sign up or check channel eligibility. Mailers included letters and postcards.

Over time, themes emphasized in the materials shifted. Earlier materials often touted affordability and reliability, while later materials noted dependability and advanced technology. Safety and convenience remained prominent themes across the entire timespan. In general, the evaluation team found that the materials clearly communicated the information and were well-designed with appealing images and a clear layout. Images were somewhat repetitive (e.g., a photo of the same home appeared in multiple mailers), which could catch less customer attention than novel images and design elements.

3.2 CUSTOMER TARGETING

This section addresses the research questions: "How does AIC currently identify potential propane customers? In what ways, if any, can this approach be improved?"

3.2.1 IDENTIFICATION PROCESS

As noted above, AIC's channel team did not maintain or provide a formal description of its approach to identifying eligible customers for outreach. During the staff interview, we learned AIC does not possess data that directly and definitively identifies customers who use propane. Instead, to target their marketing efforts, AIC has inferred which customers likely use propane using internal data queries. Specifically, staff generated a list of ~35,000 households meeting the following proxy criteria:

- Current AIC electric customer,
- No AIC gas account,
- Not in ZIP codes served by other gas utilities, and
- Income qualified (where possible).

AIC excludes multifamily addresses and certain rate codes. AIC segmented the proxy-based list by county and prioritized marketing in areas where PAs were most active. AIC then used this household list to prioritize recipients of ME&O materials.

Although this approach was logical given the data constraints, it was also inevitably imprecise since no AIC system directly identified heating fuel type. AIC interviewees explained that many households flagged as "likely propane" used **wood, mixed fuel systems, or were fully electric**. Some areas thought to lack gas actually had service from a municipal gas utility or a co-op unknown to AIC's implementers. Other areas were home to wealthy farming families far outside income guidelines, while some "propane pockets" included older, generational homes with complex construction that made retrofits costly or impossible. According to the interviewed staff, these issues significantly diluted marketing effectiveness and strained staff resources during in-home assessments.

Another critical targeting issue was **mistiming**: outreach often reached households shortly after they had refilled their propane tanks, precisely when customers were least receptive to switching fuels. This timing mismatch reduced response rates even among accurate propane leads.

3.2.2 POTENTIAL IMPROVEMENTS

Opinion Dynamics reviewed the current targeting methodology and consulted with internal data specialists and energy-industry experts to identify opportunities to strengthen the accuracy, efficiency, and scalability of propane customer identification. We pinpointed the following opportunities to augment AIC's targeting approach over time, as AIC resources allow:

1. **Apply Advanced Metering Infrastructure (AMI) data to reduce false positives**
   As documented in the 2026–2029 Energy Efficiency Plan, AIC already uses AMI consumption patterns to identify propane-heated homes and has successfully applied this approach to market and install heat pumps. This existing AMI-based methodology can be used as the primary first-level screen to distinguish electric-resistance heating from homes likely heated by non-electric fuels, immediately reducing false positives and shrinking the initial target population through an automated classification step.
2. **Incorporate American Community Survey (ACS) heating fuel data to refine geographic targeting**
   Use tract-level data to identify areas with higher propane prevalence and down-weight all-electric areas. This adds statistical priors instead of relying on raw assumptions.

3. **Improve income-targeting through layered datasets**
   Combine ACS poverty data, internal income qualification flags, and low-income channel enrollment histories to reduce outreach to affluent farming households and focus efforts where both IQ and propane likelihood overlap.
4. **Identify structural and retrofit-complexity risks**
   Use ACS housing age and construction proxies to flag "generational homes" likely to have mixed systems or retrofit barriers, guiding allies and staff before resource-intensive site visits.
5. **Rank households for the likelihood of propane use**
   Develop a Propane Likelihood Index integrating multiple data signals that will allow AIC to rank households as high, medium, or low likelihood, and use this to differentiate engagement:
   a. AMI-derived heating type predictions
   b. ACS propane prevalence
   c. Rurality and housing age
   d. Internal IQ indicators
   e. Prior customer participation in heating-related programs
6. **Build a validated statistical model using confirmed propane households**
   Once enough verified propane participants exist, train a logistic regression or combined household and neighborhood model capable of predicting propane usage with greater accuracy.
7. **Pursue county assessor data where available**
   Assessor datasets often include heating type, building age, square footage, and other structural indicators that could greatly improve precision relative to using proxy data only. Consider using county assessor data when available, even if it does not cover AIC's entire service area.
8. **Build a "go/no-go" geographic targeting map**
   Systematically record which communities have unsuitable homes, affluent propane users, or mixed-fuel households, refining targeting over time.

3.3 CUSTOMER AWARENESS AND ACCEPTANCE

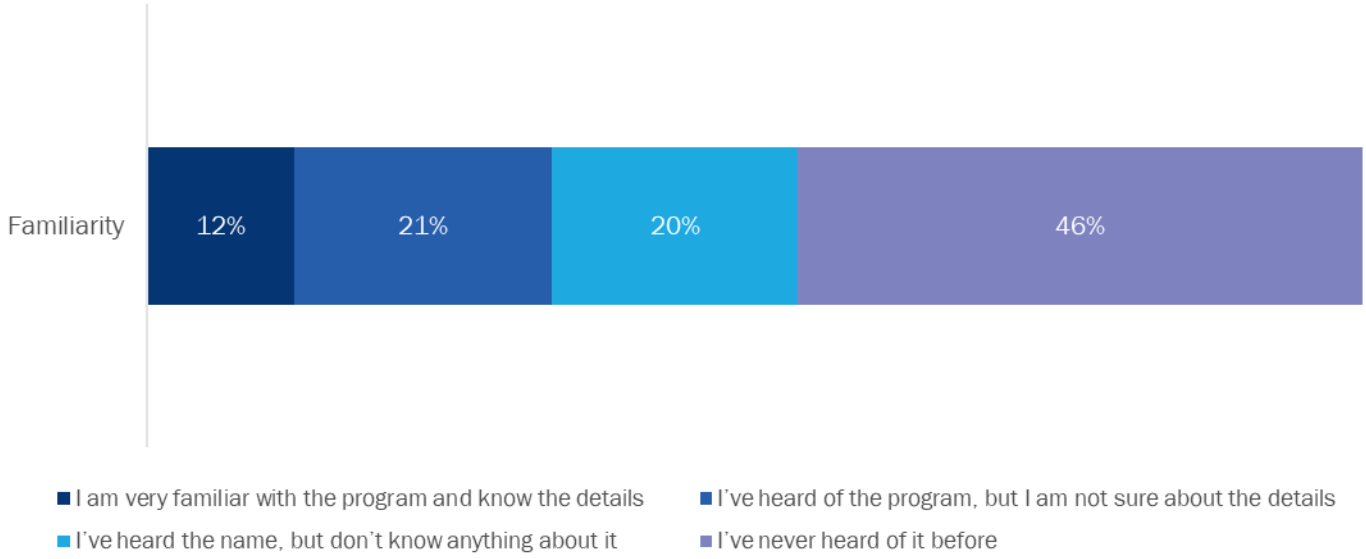
In this section, we answer the questions, "Are AIC customers currently aware of electrification efforts? What is the current level of acceptance for electrification measures among customers?"

To answer these questions, we drew upon two data sources. First, we relied on interviews with channel staff who directly interacted with participants and the broader population of interest. Second, we used the nonparticipant survey data to estimate overall levels of channel awareness and acceptance of electrification measures.

Channel staff consistently reported that channel awareness is low, even among individuals who were directly targeted through marketing efforts. Although the channel may have some name recognition, staff interactions with customers suggest that many remain unaware of the channel's details and scope. Our survey findings reinforce this qualitative evidence. Importantly, the survey population was specifically targeted by the channel for direct marketing and therefore represents the group most likely to have some familiarity with the channel. As an initial measure of awareness, we asked respondents whether they had heard of the channel prior to taking the survey. Approximately two-thirds of respondents reported they had never heard of the channel prior to taking the survey or could recall only the channel name (Figure 1). An additional 21% indicated they had heard of the channel but were not familiar with its details. Taken together, these results suggest nearly the entire sample has little to no substantive knowledge of the channel. Of those familiar with the program, 60% had received information via email. The website (16%), friends and family (14%), social

media (11%), and mail or bill inserts (10%) were the next most common ways that respondents had encountered information about the IQ Electrification Channel.

Figure 1. Self-Reported Familiarity with AIC's Electrification Channel

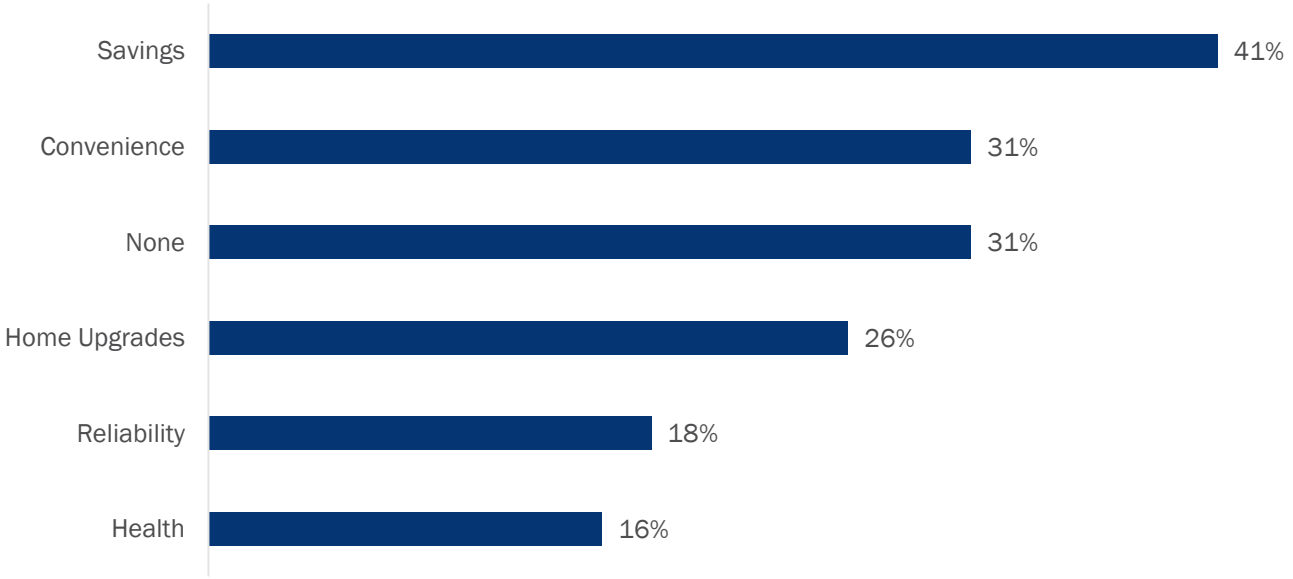


This conclusion is further supported by responses to questions about marketing exposure. Despite having been targeted for channel marketing for a year or more, 63% of respondents reported not recalling any interactions with marketing materials. Further, AIC hosted multiple in-person events to inform customers of electrification efforts. In our sample, only three people indicated they had attended an event.

Importantly, these measures of awareness represent a relatively low bar and may overstate the level of knowledge required for individuals to seriously consider participation. To probe deeper levels of awareness, we asked two follow-up questions focused on channel details. We asked these questions only of the 80 respondents who indicated they were very familiar with the channel and knew its details, or who recalled receiving marketing materials, as these respondents were most likely to retain such information.

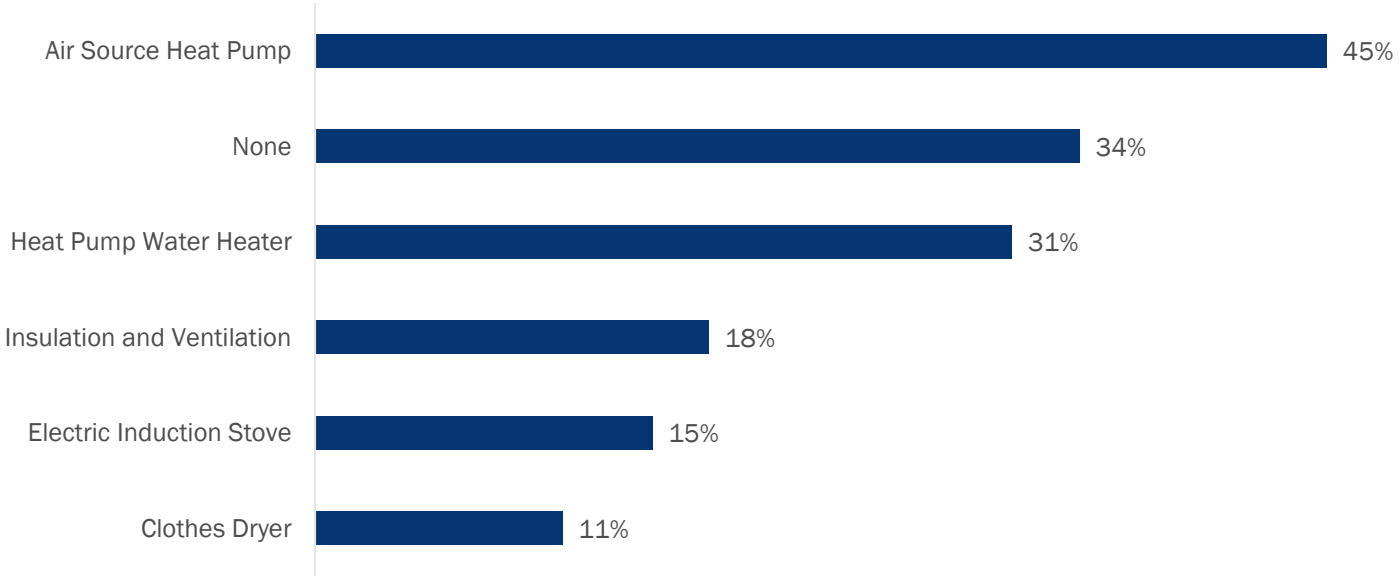
First, we asked respondents to indicate any topics they remember as being emphasized in the marketing materials, such as "Electricity is more convenient than propane" and "Switching to electricity will save you money." Next, we asked them to select any home upgrades identified as eligible under the channel. Even among this highly aware group, recall was limited. Savings were the most frequently remembered topic, yet only 41% of respondents identified it as a key benefit of electrification (Figure 2). Two topics tied for the second-most recalled: "the convenience of electricity compared to propane heating" and "none," each with 31% of respondents.

Figure 2. Electrification Topics Recalled from AIC Marketing Outreach (n=80)



A similar pattern emerged for recall of eligible measures (Figure 3). While 45% of respondents correctly identified heat pumps as eligible under the channel, more than one-third of respondents did not recall any measures included in the channel. These findings indicate that even among those aware of the channel, awareness is limited to channel name recognition and association with perhaps a single benefit or measure.

Figure 3. Eligible Measures Recalled (n=80)

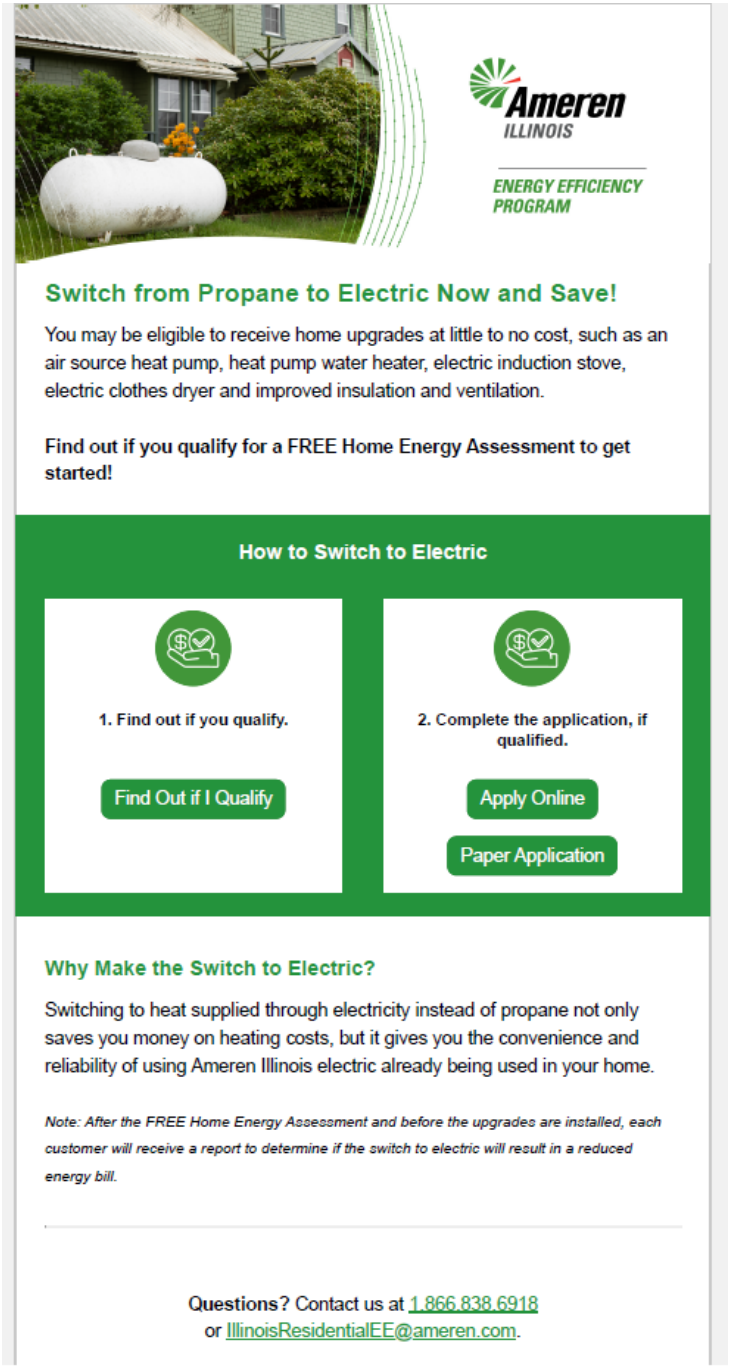


We also prompted respondent recall of channel marketing materials by including images of two such items in the survey, a digital copy of a postcard sent to customer homes (Figure 4) and a digital copy of an email message (Figure 5). Thirty percent of respondents recalled receiving the postcard, and 12% recalled receiving the email.

Figure 4. Postcard Included in Survey: "Get off Propane"



Figure 5. Email Included in Survey: "Switch from Propane"

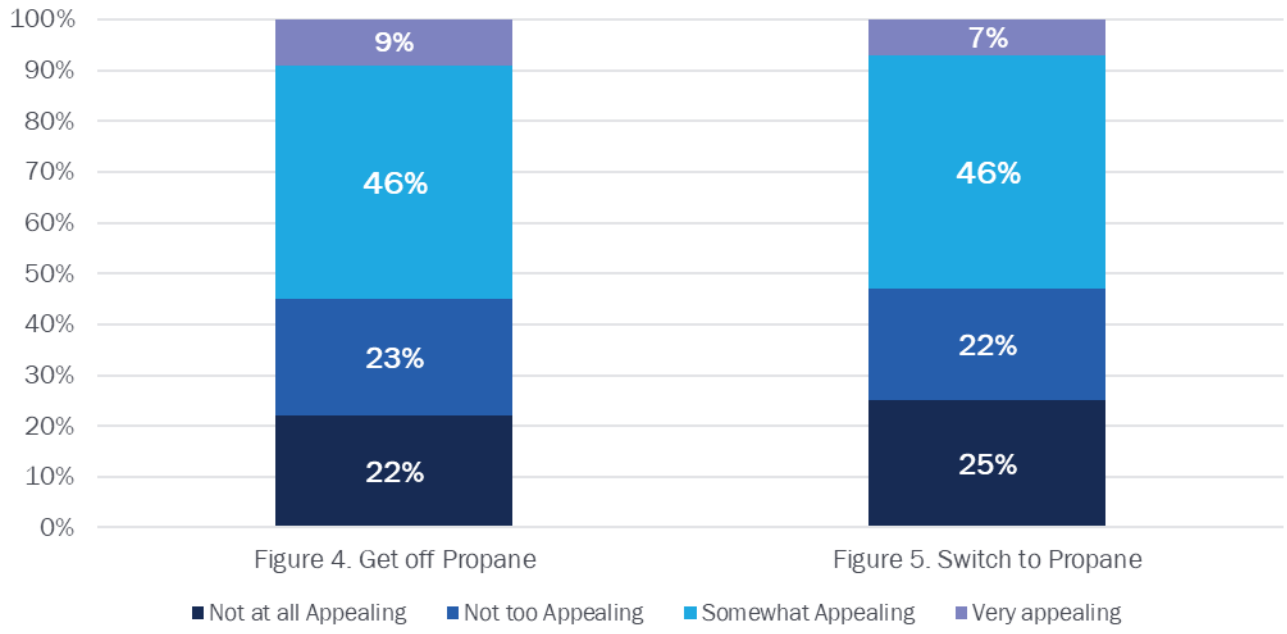


While awareness is a necessary precondition for participation, it is not sufficient; we therefore examine levels of acceptance of the channel among the target population. We define acceptance as the extent to which respondents respond positively to the channel and view electrification as a desirable option after becoming aware of it. Interviews with channel staff indicate that acceptance represents a substantial barrier for implementation. Even among customers who express initial interest, high volatility in electric rates generated skepticism toward bill analyses and projected savings. Staff also reported a range of customer concerns related to electrification technologies. Prominent examples included questions about the reliability of heat pumps during winter, limited familiarity with how new technologies work or how to use them, and a preference for cooking with gas rather than electric cooktops. In addition, staff noted that the time required to complete electrification upgrades was a major barrier for many interested customers. As a result, even if awareness improved, acceptance of both electrification and the channel remained a significant challenge.

Once again, these qualitative findings are reinforced by survey evidence. We measured acceptance through reactions to marketing materials in terms of their appeal, interest, understandability, and the extent to which respondents felt prepared to engage, followed by broader questions assessing beliefs about whether electrification would be cost-saving, convenient, and safe.

Overall, responses to the marketing materials were mixed. When asked how appealing the materials were and how prepared they felt to engage with the channel, respondents were nearly evenly split. Slightly more than half of respondents reported finding each of the example marketing materials appealing (Figure 6). Additionally, 50% and 51% said they felt prepared to follow the links provided to learn more.

Figure 6. Appeal of Marketing Materials (n=211)



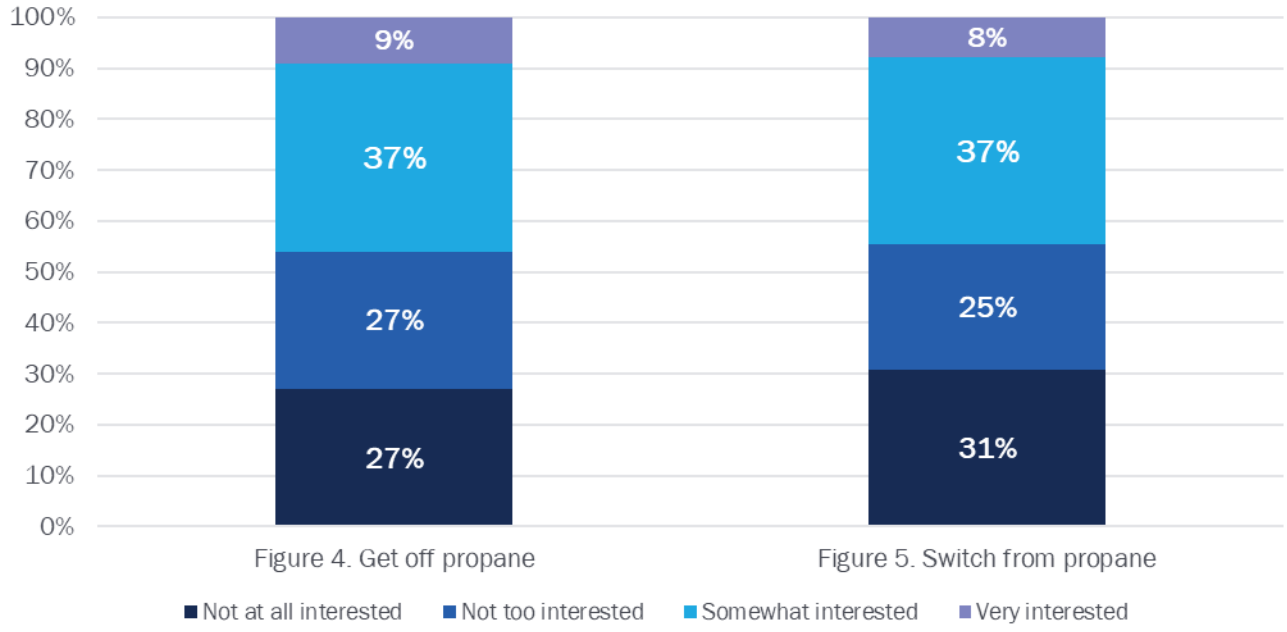
Survey Question: How appealing is the material to you?

To assess how personal and relevant the marketing materials felt, we asked respondents whether the materials seemed designed for people like them. Across both materials presented, just over 70% of respondents indicated that the message was at least somewhat designed for people like them (56% “somewhat” and 16% “very”). However, relatively few perceived strong personalization, and nearly 30% did not feel the materials were designed for them (16% “not too” and 14% “not at all”). Overall, this suggests that respondents generally viewed the materials as broadly applicable but not highly personalized, with a meaningful share not perceiving them as relevant.

Importantly, the limited appeal and interest generated by the marketing materials does not appear to stem from confusion or lack of credibility. For both pieces of marketing, more than 60% of respondents found the marketing materials believable, and an overwhelming majority (85% for Figure 4 and 93% for Figure 5) found the information in both pieces of marketing easy to understand. While a notable minority (40% for Figure 4 and 38% for Figure 5) expressed at least some skepticism about the marketing content, credibility, and clarity do not appear to be the primary constraints on channel acceptance.

Nonetheless, interest in the channel was relatively low: over half of respondents reported that they were not interested in the channel after reviewing the materials (54% for Figure 4 and 56% for Figure 5).

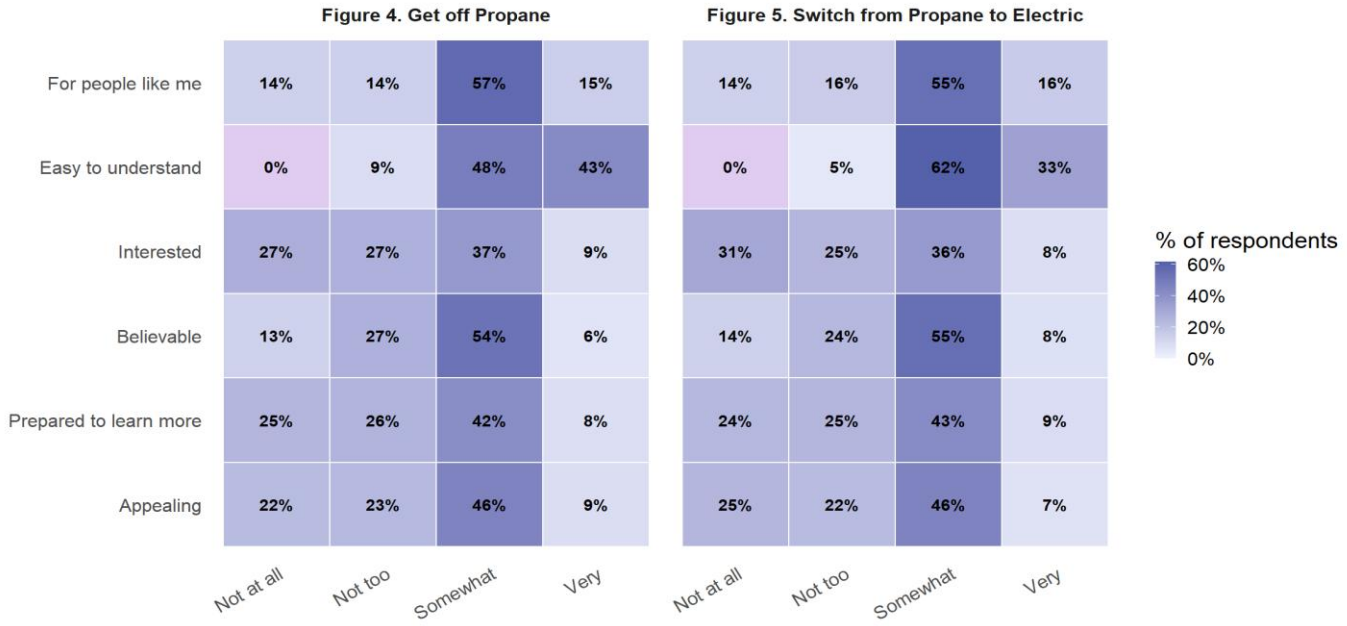
Figure 7. Marketing Materials and Interest in Channel (n=211)



Survey Question: How interested does this message make you in Ameren Illinois' electrification program?

In summary, respondents rated two pieces of marketing material on dimensions related to acceptance of electrification. While responses were generally positive, with "somewhat" as the modal response across measures, willingness to take next steps (e.g., learning more or expressing interest in electrification) skewed negatively, reflecting a gap between favorable perceptions of the materials and actual interest in pursuing electrification (Figure 8).

Figure 8. Heatmap for Evaluation of Marketing Materials (n=211)



To better understand the gap between generally positive evaluations of and belief in the marketing materials, and respondents' willingness to learn more about or engage in electrification, we asked respondents to identify any remaining concerns after reviewing the materials. Several themes emerged, ordered below from most to least prevalent. Note, we retained respondents' original capitalization and punctuation.

- **Cost and Affordability of Electrification**. Respondents frequently expressed concern about the costs of electrification and uncertainty about whether long-term savings would outweigh the expense of making the switch.

"My brother in law is all electric and has an outrageous bill."

"What is the real savings and the costs to make the change?"

- **Electric Rate Volatility Concerns**. Many respondents cited rising and unpredictable electric rates, noting difficulty planning for future costs and fear that electrification could further increase already high utility bills.

"Electric bill is already tripled in the last few years, can't hardly pay it now."

"NOT INTERESTED. YOUR ELECTRICAL RATES ARE TOO UNPREDICTABLE FOR PLANNING FOR THE NEXT 20 YEARS."

- **Reliability and Outages**. Concerns about electric system reliability were common, particularly among rural respondents, who worried about extended power outages and the loss of essential services during them.

"I'm also concerned in my rural environment about extended power outages."

"What happens when the power goes out?"

- **Propane Preference**. Some respondents expressed a strong preference for propane based on long-term familiarity, perceived convenience, and beliefs that propane is more economical for their households.

"No questions, we've had propane for over 35 years so it's what we know."

"Propane is convenient and economical to me."

- **Eligibility and Program Skepticism**. Respondents questioned whether they would truly qualify for channel benefits and expressed confusion or doubt about what "little to no cost" means in practice.

"I can't believe that someone might be eligible for all the items listed."

"Eligibility requirements and what does 'little to no cost' actually mean for me?"

- **Utility Skepticism**. A subset of respondents expressed distrust toward the utility, describing it as profit-driven and expressing concern that the channel primarily benefits the utility rather than customers.

"Ameren is a monopoly and don't care whether I have power or not. Raising prices and not thinking about large families on super fixed income."

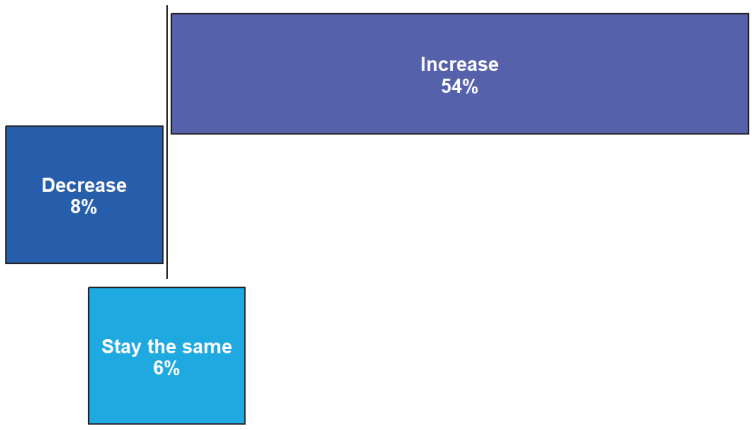
"Just another way for Ameren to get into the pockets of customers."

These concerns help explain why materials that are understandable and generally believable nevertheless fail to generate interest or acceptance. While the marketing materials communicate channel information and highlight potential benefits of electrification, they are less effective at addressing underlying financial concerns, distrust of AIC's intentions, and fears of rising electric rates.

We also asked nonparticipants whether, since 2023, they had independently installed any upgrades that are eligible for coverage under the channel. This allows us to assess acceptance of the measures in general. Overall, adoption and thus by inference, acceptance, was low: 74% of respondents reported completing none of the eligible upgrades on their own. The most commonly reported upgrade was insulation improvements (12%). Installation rates for heat pumps, and improved ventilation were each below 5%.

Finally, we asked respondents to directly compare electric and propane heating along dimensions emphasized in channel messaging. This comparison tests the value proposition for electrification: whether respondents perceived electrification as offering benefits that outweigh the costs of switching. On the most salient dimensioncost savings, the results are clear: respondents largely did not believe that electrification would save them money. Over one-third (34%) of respondents expected electrification to significantly increase their bills, and an additional 20% believed their bills would increase somewhat (Figure 9). Six percent expected their bill to stay the same after electrification, 7% believed their bills would decrease somewhat, and only 1% of respondents believed their bills would decrease significantly after electrifying their heating. Not shown in the Figure 9 are 32% of respondents who were unsure of the impact electrification would have on their electric bill. In total, 92% of respondents rejected the claim that electrification would reduce heating costs, despite direct exposure to marketing materials and widespread perceptions that those materials were understandable and otherwise believable.

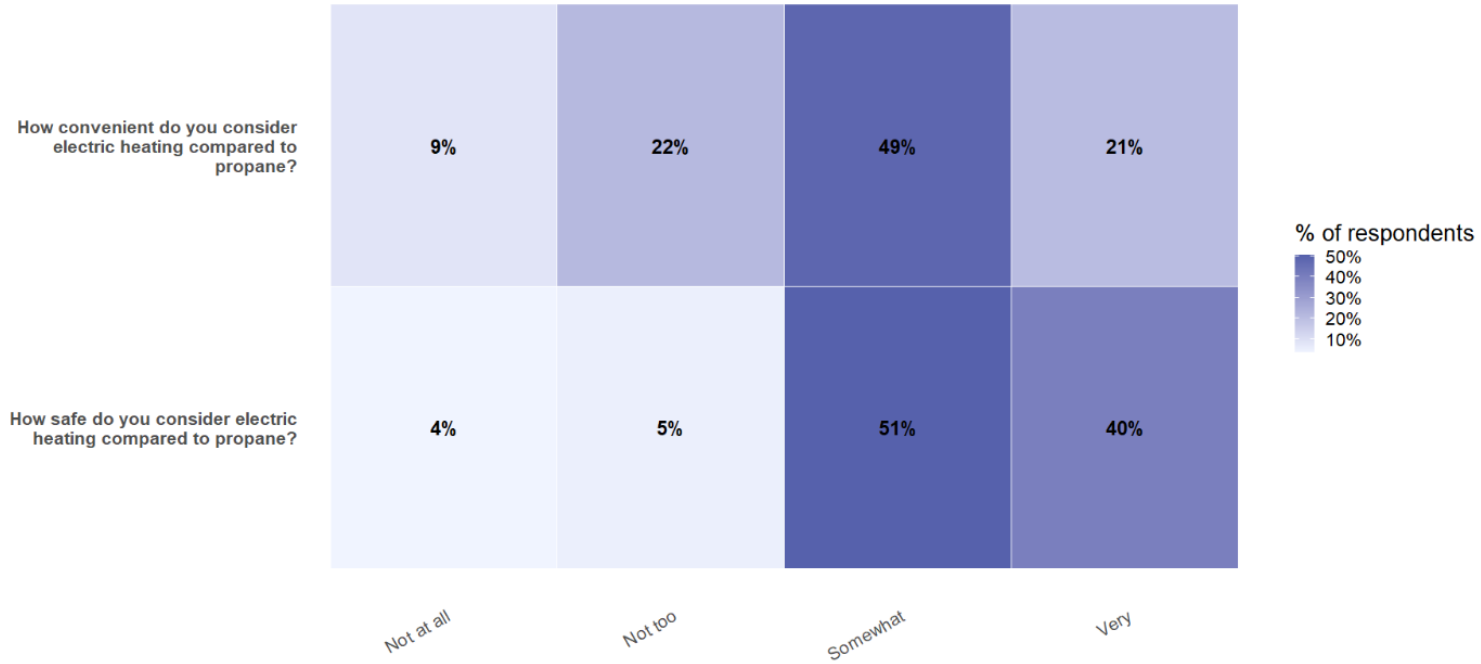
Figure 9. Anticipated Change in Energy Bills from Electrification (n=206)



Survey Question: Imagine switching your propane heater for an electric heat pump, so you pay for electricity instead of propane to heat your home. How do you think the monthly cost to heat your home would change?
Note: Proportion does not sum to 100% in figure. 32% of respondents were unsure of the effect of electrification on their bill.

Perceptions of other benefits were more favorable. Approximately 70% of respondents believed electrification would be more convenient (49% somewhat more and 21% very much more), and over 90% believed electric heating is safer than propane (51% somewhat safe and 40% very safe). Nevertheless, the lack of confidence in cost savings appears to be a critical barrier to acceptance and, ultimately, participation.

Figure 10. Comparison of Electric and Propane Heating Safety and Convenience (n=211)



3.4 ADDITIONAL BARRIERS TO ELECTRIFICATION

The final research question of this study is, "What are the barriers to electrification? Are the barriers to electrification related to awareness and acceptance? Can addressing these barriers help increase channel participation and optimize marketing and outreach efforts?" While the previous section established that limited awareness and acceptance are barriers to participation, this section identifies and ranks all key barriers to electrification. In doing so, this analysis provides additional clarity on the relative roles of awareness and acceptance compared to other commonly cited challenges.

We asked survey respondents to select all applicable barriers to electrification from a list of common challenges (Table 7). For those respondents who selected more than one barrier, we also asked them to identify the single most important barrier.

Table 7. Barriers and Their Relative Importance (n=211)

Barrier	Proportion Indicating This Was a Barrier	Proportion Indicating This Is the Largest Barrier
The cost of electricity keeps going up	73%	32%
I do not believe electrification will save me money	56%	20%
Installation costs will be too high	47%	9%
My house would require costly upgrades to electrify	45%	9%
I prefer cooking with gas	39%	5%
I do not know enough about the program	33%	3%
I trust the person/business I purchase propane from	26%	1%
Getting new appliances installed would be inconvenient	24%	2%
Ameren Illinois' incentives are too low	22%	1%
I do not believe heat pumps work well	20%	4%
Electrification would not benefit my family	15%	1%
I do not want a stranger in my home	10%	0%
I do not have time to participate	8%	3%
Someone I know had a bad experience switching from propane	2%	0%
Other	11%	7%
No barriers	2%	2%

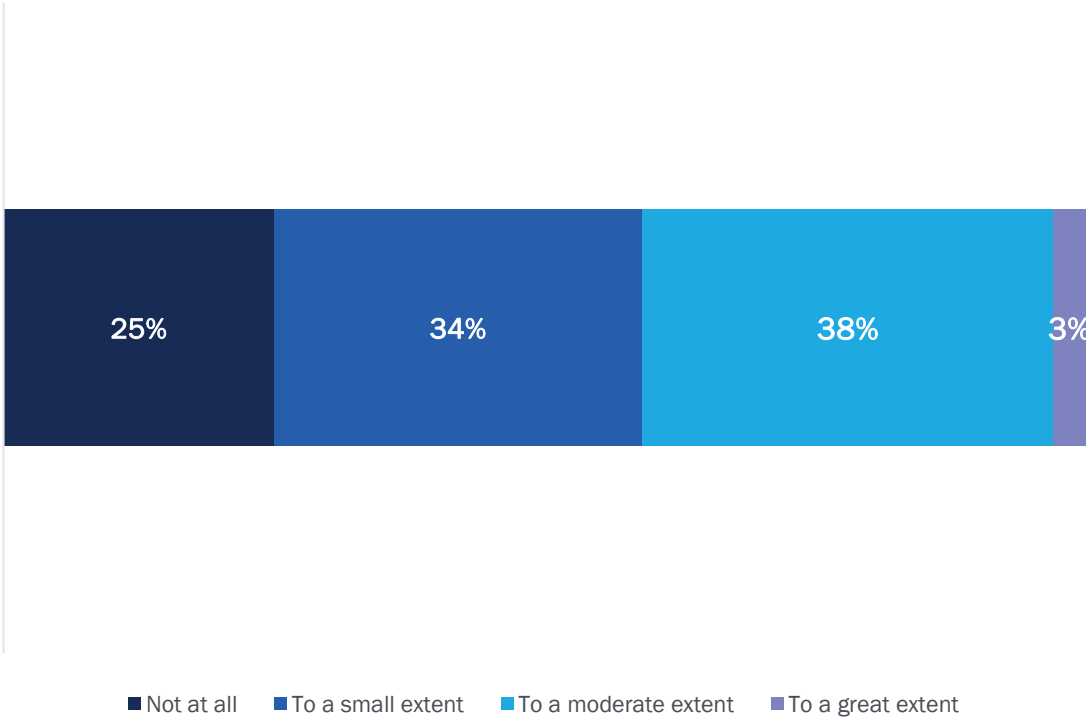
Note: Shaded rows indicate financial concerns

As indicated by the shaded rows, cost concerns dominate all other obstacles to electrification, with concerns about electric rate volatility and savings far outweighing informational, logistical, or attitudinal barriers. Seventy-three percent of respondents indicated that electric bill inflation is a concern, and 32% indicated this is the largest barrier, significantly more than any other option. The second most common barrier was a disbelief in savings, which is likely also fueled by a belief in future inflation in electric costs. The "other" category contained barriers such as concerns about power outages, service reliability, and eligibility.

Concerns about cost are closely intertwined with trust in the utility. When asked the extent to which AIC will keep customers' best interests in mind, a majority of respondents (59%) expressed low confidence. Thirty-four percent

indicated that AIC would do so to a small extent, 25% indicated not at all, while only 3% reported a great extent of trust. This pattern is consistent with the open-ended responses discussed in the previous section, in which skepticism toward the utility emerged as a prominent theme. This lack of trust likely amplifies concerns about rising electricity costs and undermines confidence in projected savings, helping explain why respondents reject cost-saving claims despite finding marketing materials understandable and generally believable.

Figure 11. Extent to Which AIC Will Keep Customers' Best Interest in Mind (n=211)



Survey Question: To what extent do you believe Ameren Illinois will keep customers' best interests in mind when implementing the electrification program?

Table 7 helps clarify whether limited awareness and acceptance represent meaningful barriers to participation. While 33% of respondents indicated that not knowing enough about electrification is a barrier, only 3% identified it as the most important barrier. In contrast, cost-related concerns dominated respondents' assessments, suggesting that limited awareness is present but rarely the binding constraint on participation.

Acceptance of electrification also emerges as an issue, but primarily through beliefs about cost rather than skepticism of the technology or its non-financial benefits. Although 20% of respondents expressed concern that heat pumps do not work well, only 4% identified this as their most important barrier to participation. This aligns with earlier findings showing that respondents generally viewed electric heating as safer and more convenient than propane. Together, these results indicate that respondents largely accept the non-cost-related benefits of electrification.

However, acceptance breaks down sharply when respondents consider financial outcomes. Concerns about rising electricity costs and the belief that electrification will not save money are both widely cited and most frequently identified as the largest barriers to participation. The previous section also showed that the vast majority of respondents do not believe that electrifying their home would lower their electric bill. This pattern persists despite many respondents finding the channel's marketing materials understandable and generally believable. As a result, while respondents may accept the channel's messaging and the broader case for electrification, this acceptance is not sufficient to overcome skepticism about electricity rates and ongoing cost uncertainty.

3.4.1 ADDRESSING BARRIERS

Finally, we asked respondents directly what AIC could do to make them consider switching from propane to electric home heating. Responses indicate that willingness to consider electrification is highly conditional and driven primarily by concerns about financial risk. Across open-ended responses, the most common themes were lower electricity rates, guaranteed or clearly demonstrated cost savings, and long-term price stability.

These responses reveal a persistent disconnect between channel design, marketing, and customer perceptions. The marketing materials shown earlier explicitly highlighted that participants would receive installation and appliances at little or no upfront cost, and the channel requires a positive projected bill impact based on a cost projection tool. Nevertheless, respondents continued to cite installation costs, equipment costs, and uncertainty about future electricity bills as primary barriers. This suggests that while customers may understand the stated channel features, they remain unconvinced that projected savings and cost protections will materialize in practice, particularly given recent electricity rate increases.

A substantial share of respondents indicated that nothing would cause them to consider electrification under current conditions, citing distrust of the utility, concerns about reliability, or satisfaction with existing propane systems. Others noted that they might consider electrification only at natural replacement points, such as when existing equipment reaches the end of life, underscoring the importance of timing in outreach efforts. One possible avenue for building trust and adoption is word-of-mouth recommendations from trusted sources. However, most respondents (88%) indicated that they do not know anyone who has electrified their home. Only 11% of respondents indicated they know at least one household who has electrified. Without recommendations from trusted sources, it may be difficult for AIC to overcome trust issues that hamper electrification uptake among this population.

Table 8. Respondent Knowledge of Electrified Households (n=211)

Number of Households Known to Have Electrified	Number of Respondents	Proportion of Respondents
0	186	88%
1–2	22	10%
3–5	2	1%
6+	1	<1%

Taken together, these findings suggest that increasing participation will likely require more than additional information about channel benefits or upfront cost coverage. Even when low upfront costs are clearly communicated, skepticism about long-term affordability and electricity rate stability appears to limit acceptance and willingness to engage.

4. LESSONS FROM PEER UTILITIES

In contrast to the preceding section, this section highlights information gleaned from interviews with peer utilities that run similar programs. The evaluation sought to learn from peer utilities' experiences and document how they have resolved issues similar to those faced by AIC's Electrification Channel. Findings from peer utilities aligned with the survey results and highlighted important details for AIC channel administrators that may provide insight into how to address barriers that impact their electrification efforts. We break this section into subsections covering the same topics addressed above.

4.1 MARKETING

Across peer utilities, awareness of electrification remained low and uneven, particularly among income-qualified customers and rural households. Interviewees consistently reported that awareness rarely developed through broad marketing campaigns. Instead, it grows incrementally through repeated exposure, trusted messengers, and visible examples of electrification within a community. Customers often first learned about electrification through contractors, neighbors, or engagement in other utility programs, rather than through direct outreach.

Interviewees noted that single-touch communications, such as mailers or email, may generate name recognition but typically do not produce meaningful understanding. Peer utilities reported that awareness increased when programs maintained a visible presence over time, and when early participants created tangible proof that the program is real, feasible, and worth considering.

Furthermore, peer utilities consistently reported that customers were rarely motivated solely by environmental benefits or new technology. Instead, acceptance hinged on whether electrification was perceived as reliable, comfortable, and appropriate for the home. Programs that led with comfort, reliability, and home improvement benefits reported stronger customer receptivity than programs centered on environmental framing or innovation. Interviewees suggested that cost messaging could be potentially effective but emphasized it must be deployed carefully to avoid overpromising and subsequent dissatisfaction.

Peer programs also described skepticism toward the utility of highly subsidized upgrades as a recurring barrier. Customers often questioned why the program exists, how it is funded, and whether there are hidden costs or future obligations. Interviewees explained that acceptance improved when programs proactively explained the purpose of the program, the funding and regulatory rationale, and the protections in place for customers. Peer utilities indicated that building legitimacy early was especially important in communities with lower baseline trust and limited prior exposure to utility-sponsored home upgrades.

4.2 CUSTOMER TARGETING

Peer utility interviews revealed that other utilities identify potential propane-to-electric conversion candidates using a mix of administrative data, mapping tools, and participation history in other utility programs. Common inputs included income qualification, prior program participation, and housing age. However, interviews consistently indicated that customer-level data on fuel type and electrification readiness were often incomplete or inaccurate, particularly in rural areas and older housing stock. As a result, identification efforts frequently relied on priority neighborhoods rather than attempting to pre-screen individual homes with high confidence.

Peer utilities also emphasized that contractors, neighbors, and local institutions were often the most effective channels for identifying eligible customers. Contractors, in particular, served as the program's "face" and the primary source of customer referrals. Word-of-mouth and community validation helped normalize electrification and reduced skepticism,

especially in areas where customers had limited familiarity with heat pumps or whole-home electrification. In practice, interviewees claimed these relational channels often outperformed broad marketing for identifying customers who are not actively seeking electrification but may consider it when approached by trusted messengers.

Peer utilities reported that targeting was more effective when program designs enabled early determination of customer fit. Interviewees described simplified early decision points, such as feasibility validation, as a way to reduce time spent on false positives produced by data-driven targeting. They also described flexibility as particularly important in older or rural housing, where electrical upgrades, housing conditions, or other constraints may prevent a full conversion.

4.3 BARRIERS TO ELECTRIFICATION

Peer utility interviewees noted that successful targeting alone does not translate into completed projects when contractor capacity, grid readiness, permitting, or cross-team coordination become bottlenecks. Electrification projects require alignment among program staff, contractors, grid teams, and inspectors, and delays or unclear ownership across these functions can increase dropout. Peer utilities therefore emphasized investments in contractor development, clear internal roles, and streamlined handoffs as critical to improving follow-through once customers were identified.

Additionally, peer utilities consistently identified the time and disruption required to participate as major reasons for hesitation and dropout. Whole-home conversions can involve multiple system replacements, electrical upgrades, repeated visits, and customer coordination across trades. Even motivated customers may disengage if the process feels overwhelming or too demanding. Programs that introduced customer-managed scheduling, permitting, and paperwork, and that oriented customers early to the full scope and timeline of work, reported subsequent increases in within-program completion rates and decreases in attrition.

Peer utilities described a common pattern in which limited awareness constrained initial reach, but improving awareness alone did not ensure participation. Acceptance tended to follow familiarity, social proof, and repeated contact rather than initial exposure. Even when customers understood the program offerings, interviewees said that skepticism about the utility's motives and concerns about bills prevented them from converting from interest to participation.

Finally, across interviews, bill anxiety and distrust repeatedly emerged as cross-cutting barriers that overrode perceived benefits. Customers may accept the non-cost benefits of electrification, such as comfort, health, or safety, while still declining to participate due to concerns about electricity rates or doubts that savings claims will hold in practice. Peer utilities therefore emphasized pairing outreach and education with clear explanations of customer protections, transparent bill impact modeling, and community validation to build credibility over time.

5. CONCLUSIONS AND RECOMMENDATIONS

Conclusion: Self-reported familiarity with the Electrification Channel remained relatively low, and many customers did not recall specific channel themes or covered measures after receiving targeted outreach.

Conclusion: AIC's marketing materials covered a wide range of themes, spanning financial, practical, and societal considerations, with all materials incorporating at least two of these themes. However, survey results indicated that cost concerns, including equipment affordability, electric rates, and the cost of installing new equipment, were the most salient for this population. Peer utility and AIC staff interviews further reinforced that savings and no-upfront-cost messaging were necessary (but not sufficient) for engaging income-qualified customers.

- Recommendation: While interweaving many themes showcased the breadth of electrification benefits, it risked leaving customers with a diffuse set of impressions. Consider narrowing the themes presented in materials to one to three core themes, centered on affordability and long-term savings. Additional topics, such as technology, safety, or decarbonization, can be moved to the channel website or an FAQ page for customers who want more information.
- Recommendation: Consider framing electrification as a way to avoid the financial burden of large seasonal propane purchases. Messaging could highlight the contrast between paying a large upfront sum to refill a propane tank and spreading smaller payments across the winter with electric heat. Campaigns might use direct questions to build urgency, such as, "Are you preparing for another expensive propane delivery? Switch now and avoid the big bill. Electrification makes heating more affordable and predictable." This approach links channel benefits to the customer's immediate financial situation and provides a timely incentive to act before committing to another propane purchase.

Conclusion: Customer targeting was most effective when data-driven approaches were paired with local, neighborhood-level knowledge. Across peer utility interviews, implementation staff reported data availability challenges, similar to those faced by AIC, particularly in accurately identifying household heating fuel. While peer programs employed a range of targeting methods (using administrative data, mapping tools, participation history, etc.), interviewees consistently emphasized that neighborhood-level prioritization and trusted local channels were more effective than attempting to pre-screen individual households.

Conclusion: Efficiency and reliability of targeted outreach improved when program design allowed customers to be quickly screened, redirected to a more appropriate program, or offered partial participation rather than being fully excluded. This flexibility reduced staff time spent on ineligible leads, preserved customer goodwill, and enabled programs to respond to real-world housing conditions and customer readiness. AIC staff interviews similarly indicated that bottlenecks created by rigid qualification requirements can delay customer engagement and strain staff resources, suggesting that streamlining early screening and enabling flexible pathways to participation could improve both targeting efficiency and customer experience.

- Recommendation: AIC should continue to rely on data-driven targeting but consider elevating neighborhood-level prioritization as a major component of its outreach strategy, particularly in areas with limited or unreliable customer-level fuel data. This approach should be supplemented by input from PAs, contractors, and community partners to refine outreach geographies over time. Incorporating local feedback loops, such as tracking which neighborhoods generate the highest assessment-to-install conversion rates, can help iteratively improve targeting accuracy while reducing reliance on imprecise household-level fuel assumptions.
- Recommendation: To address false positives and staff-reported bottlenecks in the qualification process, consider introducing low-burden early screening steps that allow rapid determination of customer fit and pathways to appropriate programs. This could include a short intake survey or pre-screening tool that captures a limited set of

high-impact variables, such as primary and secondary heating fuel, housing age or construction type, income qualification status, and known electrical or space constraints. AIC may also consider reducing or deferring certain qualification requirements until later in the process, particularly those that do not materially affect early feasibility. In parallel, the channel could introduce a staggered qualification structure that allows customers to partially qualify for specific measures, assessments, or incentives before meeting full channel requirements. Together, these approaches would enable faster screening, earlier engagement, and more efficient routing of customers while reducing staff burden and preserving customer trust.[2]

Conclusion: Customers reported limited knowledge or recall of available measures and channel details beyond high-level messaging. Many customers have limited familiarity with electrification concepts and persistent knowledge gaps related to these technologies.

Conclusion: Cost concerns reduced customer acceptance and amplified other barriers to pursuing electrification. Survey responses to both closed- and open-ended questions consistently highlighted the central role of cost, particularly related to electric rates, as a key constraint on customer willingness to participate. Customers often believed electric rates would increase and continue to rise over time. Given the central role that financial risk played in respondents' decision-making, improvements in awareness or messaging alone are unlikely to produce substantial gains in participation unless concerns about the cost of electrification are credibly addressed.

- Recommendation: Acknowledge that many customers are experiencing and are concerned about rising electric costs. Build trust by validating customer experience and providing accurate energy cost estimates during channel onboarding. Consider presenting multiple cost scenarios that reflect different electric price change assumptions, while basing eligibility and qualification on estimated bill impacts under current rates to avoid introducing additional bottlenecks into the qualification process.

Conclusion: Survey respondents often expressed distrust for utilities, in part because they associated them with rising electric rates. Lack of trust likely reduced customers' willingness to believe cost projections or assurances of positive bill impacts. Similarly, peer utilities emphasized the importance of trust in driving participation, noting that skepticism toward savings claims and unfamiliar technologies were major barriers to overcome. In contrast, AIC staff interviews indicate that trust in propane dealers and suppliers tended to be relatively high, as these entities were often embedded within local communities and maintained visibility through non-sales activities, such as sponsoring community events or local organizations.

- Recommendation: Augment partnerships with local trusted messengers such as community-based organizations. Consider embedding their voices into marketing materials and campaigns. For example, including quotes from community organizations, co-branding with trusted local sources, and featuring testimonials from satisfied participants can help normalize electrification. Provide lawn signs to customers who have electrified and are happy with their decision, to signal to local communities that people they know and trust have electrified. Information framed by trusted messengers is often received as more credible than when it comes solely from AIC, and it positions electrification as a familiar, community-supported experience rather than an abstract utility initiative.

Conclusion: As contractors are more informed and inherently invested intermediaries who stand to profit from the channel, they may be an effective pathway for increasing customer understanding and engagement in electrification, as well as partners in simplifying the electrification process. AIC reported that the number of channel eligibility requirements and the scope of work involved can be overwhelming for customers. Peer utility program staff noted that shifting some of the burden of paperwork and technical understanding from customers to contractors (who are often more trusted than utilities), led to increased participation and customer satisfaction with the participation process.

[2] Recent staff interviews have highlighted a new "customer journey pathway" introduced to AIC's website in 2025 that allows customers to better identify which IQ offerings best fit their needs. This tool may already address some of the recommendations made here.

- Recommendation: Develop a contractor support toolkit to reduce complexity and improve delivery capacity. This could include a dedicated contractor support team or enhanced internal resources to assist with complex cases, standardized scripts or talking points to help contractors explain electrification to customers, and curated lists of qualified electricians or project partners. AIC could further support cross-trade coordination by facilitating introductions, providing assurances of partner quality, and clarifying roles and responsibilities across trades.
- Recommendation: Improve contractor participation by addressing profitability and long project timelines. For contractors to actively promote electrification and invest in building the necessary capabilities, projects must be perceived as financially viable despite their inherent complexity and long timelines. Consider providing targeted incentives or participation supports to offset upfront costs, reduce risk, maintain cash flow, or improve contractor profitability. In the near term, augmenting channel delivery with contractors who already possess electrification expertise could help relieve capacity constraints while serving as proof of concept for contractors in areas without established electrification-focused firms.

APPENDIX A. IMPLEMENTATION TEAM INTERVIEW GUIDE

INTRODUCTION

Thank you for taking the time to chat with me today. As you may recall, I'm working with Ameren Illinois to evaluate their income-qualified Electrification channel. I want to understand how the channel works, how potential participants join the program, and any suggestions you may have for the channel in the future. In addition to interviews with staff, we will also review channel marketing, education, and outreach materials, survey potential new customers who have not yet participated in the channel, and interview AIC's peer utilities to understand their approaches. We will utilize all of this information to make recommendations for changes to the channel in the future. All your answers are confidential, and we de-identify all responses such that your answers cannot be traced back to you. You can skip any questions you are unsure about, and you can decide to end your participation at any time.

Any questions before we begin?

I'll be taking notes as we talk, but I'd like to record the conversation to help with my notetaking. Is that okay with you?

BACKGROUND INFO [ASK ALL]

Please describe your title and role at your company.

Q1. Describe the work you've done related to Income Qualified Electrification channel at AIC.

GENERAL CHANNEL INFORMATION [ASK ALL]

Q2. Could you please describe the Income Qualified Electrification Channels' goals or objectives?
[Probe for Target Population]

Q3. Can you walk me through how the channel is organized and situated within AIC? How does it relate to other channels/programs?
[Probe For IQ SF and Mobile Home Channels]

Q4. Can you walk me through the customer journey, or what a customer would go through to participate in this program from beginning to electrification, being sure to also describe important steps from the implementation side?
1. How does the program keep track of customers and measure their participation?

Q5. What incentives do customers receive to participate?

TARGETING QUESTIONS [ASK ALL]

Let's start with the earlier stages of the channel, specifically, how income-qualified propane customers are identified for recruitment.

Q6. How are potential participants identified for this channel?
1. What data, metrics, or tools are used to support that identification?

2. Who are the key decision-makers or stakeholders involved in setting or guiding the targeting criteria? How do the CBOs and Program Allies fit into targeting?

3. What are the differences between the Single Family and Mobile Home Program, in terms of the electrification program's involvement?

[Follow Up if Not Mentioned]

How did the channel identify propane customers?

How did the channel identify income-qualified consumers?

In your experience, how effective is this approach at identifying customers who are a good fit for the channel, specifically for both propane and IQ customers?

If you could change how potential participants are identified and targeted, what would you suggest?

MARKETING AND OUTREACH QUESTIONS [ASK ALL]

Now we'd like to hear about what happens after potential participants are identified — specifically, how AIC reaches out and informs them about the channel.

Q7. Can you describe any overarching strategies or goals that drive your marketing/awareness efforts?

Q8. What types of marketing efforts and materials are used to make propane users aware of the channel?

1. We've heard that events may be part of this channel – can you describe what those look like?

[Follow-Up if Not Mentioned]

In what ways are marketing materials delivered to potential participants? [If Needed Prime: Remind them of common channels for marketing: email, mailers, phone calls, or partnerships with community organizations]

Q9. Can you describe how successful outreach has been for this channel in making sure the right people are getting the materials? [If needed, refer to any outreach materials mentioned above,]

1. What data, indicators or metrics are used to assess how well the outreach is working?

Q10. How would you assess the strengths and areas for improvement of the marketing materials in terms of raising customer awareness and interest in the electrification channel?

Q11. How would you change the outreach process, if at all? That is, the ability to get persuasive materials in front of the right people and/or increase attendance at events?

BARRIERS QUESTIONS [ASK ALL]

Now, considering the channel overall, we've heard from AIC that participation hasn't met expectations. We'd like your take on what might explain that.

Q12. From your perspective, why do you think customers might not choose to participate that we have not already discussed?

[Follow-Up if Not Mentioned]

Have you received customer feedback about the program? If so, what is the nature of this feedback?

Have you received any feedback from CBOs or other stakeholders about the program? If so, what is the nature of the feedback you have received?

Do you think there are any behavioral reasons or consumer preferences keeping potential customers from electrifying (i.e., they like cooking with gas, they make certain foods that require an open flame)?

Do you think trust issues may be a barrier, where consumers do not believe they could save money, generally distrust utilities, and/or do not want a stranger in their home?

Q13. Any other barriers you can think of that we haven't discussed?

Q14. What changes would you suggest to reduce barriers and increase participation that we haven't already discussed?

CLOSING

That's all the questions I have for now — thank you so much for taking the time to speak with me and share your perspective.

Before we wrap up, is there anything we didn't cover that you think is important to mention?

And finally, if anything else comes to mind after this conversation, feel free to reach out or pass it along through your team — we really appreciate your input as we continue learning more about the Electrification Channel. In addition, would it be okay if we reach back out to you if any further questions come up?

APPENDIX B. CUSTOMER SURVEY INSTRUMENT

INTRODUCTION/LANDING PAGE

Thank you for participating in our survey. Ameren Illinois will use the survey results to better serve its customers and meet their energy needs. Your responses will only be used for these purposes and will remain strictly confidential.

If you exit the survey before completing it, you can pick up where you left off by clicking on the link from your email.

Opinion Dynamics, an independent research firm, is conducting this survey on behalf of Ameren Illinois. If you have any questions or technical difficulties with the survey, you may contact Taylor Williams at twilliams@opiniondynamics.com.

Please click the button below to get started.

[INCLUDE ON EVERY PAGE OF SURVEY AS FOOTER: If you experience any technical issues with this survey, please contact Taylor Williams at taylor.williams@opiniondynamics.com.]

SCREENING [ASK ALL]

[PROGRAMMING NOTE: ALL QUESTIONS FORCED RESPONSE UNLESS NOTED]

S1. Our records indicate that you are an Ameren Illinois customer living at or receiving mail at <ADDRESS>. Is this still correct? [SINGLE RESPONSE; FORCED RESPONSE]
1. Yes, I currently have an Ameren account at that address
2. No, I no longer have an account with Ameren Illinois at that address [TERMINATE]
3. No, I never had an account with Ameren Illinois at that address [TERMINATE]

[SHOW IF S1 =2 or 3: Thank you for your time. This survey is for the current Ameren account holder at <ADDRESS>]

S2. Does your home at <ADDRESS> using propane as a primary heating source? [SINGLE RESPONSE; FORCED RESPONSE]
1. Yes
2. No [TERMINATE]
3. I don't know [TERMINATE]

[SHOW IF S2 =2 or 3. Thank you for your time, this survey is for those who use propane as a primary heating source]

PROGRAM AWARENESS AND RECALL OF MARKETING EFFORTS [ASK ALL]

Q2. Ameren Illinois has a program to help customers switch from propane heating to electric heating, sometimes called electrification. How familiar are you with this program? [SINGLE RESPONSE; FORCED RESPONSE]
1. I am very familiar with the program and know the details
2. I've heard of the program, but I am not sure about the details
3. I've heard the name, but don't know anything about it
4. I've never heard of it before

Q3. Between 2023 and today, do you remember seeing, hearing, or reading anything about switching from propane to electric heating or about electrification, such as in emails, bill inserts, in-person events, or any other outreach efforts by Ameren Illinois? [SINGLE RESPONSE; FORCED RESPONSE]
1. Yes
2. No

Q4. [ASK IF Q1 or Q3=1] How did you receive information about the program? Select all that apply. [MULTIPLE RESPONSE; RANDOMIZE 1-7; FORCED RESPONSE]

1. Phone calls from Ameren Illinois
2. An email from Ameren Illinois
3. Ameren Illinois in-person event
4. Friends, family, or a colleague
5. Social Media (i.e., Facebook, X/Twitter or Instagram)
6. Ameren Illinois website
7. Local community group. Please specify [Open Ended Response]
0. Other, Please Specify [Open Ended Response]

[IF Q4=3 or 7]

You indicated that you attended an event about electrification or switching from propane to electric. For the next questions we would like to know more about your experiences there.

Q5. How useful was the information provided by Ameren Illinois at the event you attended? [OPEN TEXT RESPONSE]

1. Very useful
2. Somewhat useful
3. Not too useful
4. Not at all useful

[IF Q4=3 or 7]

Q6. How much of the information provided by Ameren Illinois about switching from propane to electric or electrification was new to you?

1. None
2. Very little
3. Some
4. Most
5. All

[IF Q4=3 or 7]

Q7. What additional information do you wish had been shared or explained more clearly during the event? Please write a few sentences. [OPEN ENDED RESPONSE]

[SHOW IF Q2=1 or Q3=1]

Q8. Thinking about any materials you received from Ameren Illinois about switching from propane or electrification, which of the following topics, if any, do you recall were mentioned about the program? *Select all that apply.* [MULTIPLE RESPONSE; FORCED RESPONSE; RANDOMIZE 1-5]

1. Electricity is more convenient than propane
2. Switching to electricity will save you money
3. Switching to electricity is more reliable than propane
4. Switching to electricity is healthier for you than propane
5. You can get home upgrades or new appliances for little or no cost
6. None of the above [EXCLUSIVE]

[SHOW IF Q2=1 or Q3=1]

Q9. Which of the following home upgrades, if any, do you recall were mentioned about the program? [MULTIPLE RESPONSE; FORCED RESPONSE; RANDOMIZE 1-5]

1. Air source heat pump
2. Heat pump water heater
3. Electric induction stove
4. Electric clothes dryer
5. Improved insulation and ventilation
6. None of the above [EXCLUSIVE]

ACCEPTANCE [ASK ALL]

Q10. Next, please look at this image carefully:



Q11. Do you recall receiving this from Ameren Illinois in the mail or via email in 2025? [SINGLE RESPONSE; FORCED RESPONSE]

1. Yes
2. No
98. Not sure

Q12. Please answer the following questions based on this image <Pipe in Email Image> [SHOW FOR Q13,Q14,Q15,0,Q17,Q18,Q19 RANDOMIZE ORDER BUT ANCHOR Q19]

Q13. How appealing is the material to you? [SINGLE RESPONSE]

1. Not at all appealing
2. Not too appealing
3. Somewhat Appealing
4. Very Appealing

Q14. After reading the material, how prepared do you feel to follow the link provided and learn more?

1. Not at all prepared
2. Not too prepared
3. Somewhat prepared
4. Very prepared

Q15. How believable is the information provided in the material about the benefits of switching from propane to electric?

1. Not at all believable
2. Not too believable
3. Somewhat believable
4. Very believable

Q16. How interested does this message make you in Ameren Illinois' electrification program?

1. Not at all interested
2. Not too interested
3. Somewhat interested

4. Very interested

Q17. How easy is the information in this message to understand?
1. Not easy at all
2. Not too easy
3. Somewhat easy
4. Very easy

Q18. To what degree would you say this message was designed for people like you?
1. Not at all
2. Not too much
3. Somewhat
4. Very much

Q19. What questions or concerns do you have about the information in the image? [OPEN TEXT BOX]

Q20. Since 2023, which of the following home improvements have you made? Select all that apply. [MULTIPLE SELECTION;FORCE RESPONSE; RANDOMIZE 1-5]
1. Installed an air source heat pump
2. Installed a heat pump water heater
3. Installed an electric induction stove
4. Installed an electric clothes dryer
5. Improved insulation
6. Improved ventilation
7. None of the above [EXCLUSIVE]

Home electrification means replacing appliances and systems that run on fossil fuels (like propane and oil) with electric alternatives. For example, installing a heat pump for heating and cooling instead of a propane furnace.

Thinking about **electrifying your home heating system**, please answer the following questions

[SKIP IF Q20=1]

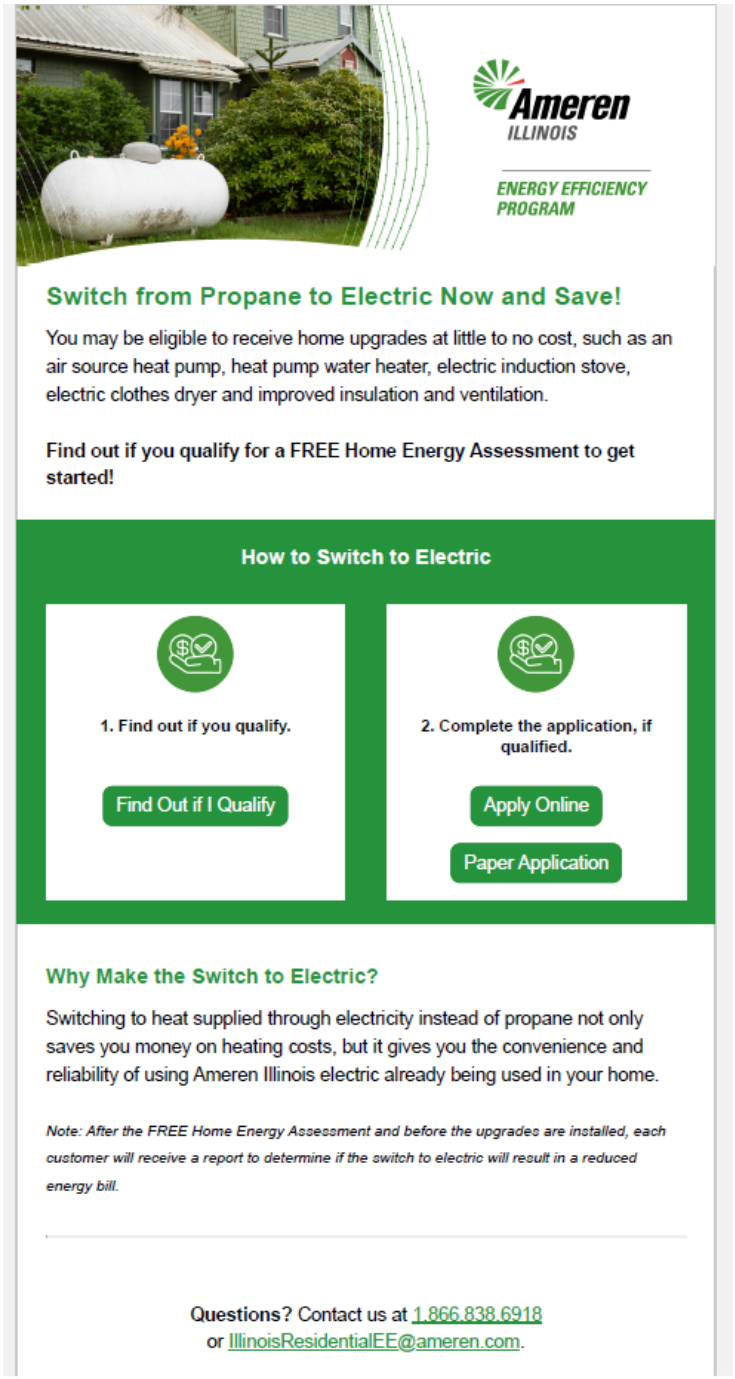
Q21. Imagine switching your propane heater for an electric heat pump, so you pay for electricity instead of propane to heat your home. How do you think the monthly cost to heat your home would change?
1. The cost would decrease significantly
2. The cost would decrease somewhat
3. The cost would stay the same
4. The cost would increase somewhat
5. The cost would increase significantly
98. Not sure

Q22. How safe do you consider electric heating compared to propane heating? Electric heating is… [SINGLE RESPONSE; FORCED RESPONSE]
1. Not at all safe
2. Not too safe
3. Somewhat safe
4. Very safe

Q23. How convenient do you consider electric heating compared to propane heating? Electric heating is… [SINGLE RESPONSE; FORCED RESPONSE]
1. Not at all convenient
2. Not too convenient
3. Somewhat convenient
4. Very convenient

Q24. Please take a moment to look at this email Ameren Illinois may have sent you about the program. Did you receive the email? <Pipe in Email Image> [SINGLE RESPONSE; FORCED RESPONSE]

1. Yes
2. No
98. Not sure



Please answer the following questions based on this image <Pipe in Email Image> [SHOW FOR Q25; 0,Q26,Q27,Q28,Q29 RANDOMIZE ORDER]

Q25. How appealing is the material to you? [SINGLE RESPONSE]

1. Not at all appealing
2. Not too appealing
3. Somewhat Appealing
4. Very Appealing

After reading the material, how prepared do you feel to follow the link provided and learn more?

5. Not at all prepared
6. Not too prepared
7. Somewhat prepared
8. Very prepared

Q26. How believable is the information provided in the material about the benefits of switching from propane to electric?

1. Not at all believable
2. Not too believable
3. Somewhat believable
4. Very believable

Q27. How interested does this message make you in Ameren Illinois electrification program?

1. Not at all interested
2. Not too interested
3. Somewhat interested
4. Very interested

Q28. How easy is the information in this message to understand?

1. Not easy at all
2. Not too easy
3. Somewhat easy
4. Very easy

Q29. To what degree would you say this message was designed for people like you?

1. Not at all
2. Not too much
3. Somewhat
4. Very much

Q30. In the future, who would you like to hear from about the electrification program? Select all that apply [FORCED RESPONSE; MULTIPLE RESPONSE; RANDOMIZE 1-6]

1. Ameren Illinois
2. Community Action Agency
3. Local nonprofit organizations
4. Local media
5. Community based organizations (e.g. churches, libraries, senior centers)
6. Other community members (e.g., neighbors, friends, or family)
0. Other [OPEN TEXT ENRY]

Q31. In the future, how would you prefer to hear about Ameren Illinois's electrification program? Select all that apply. [MULTIPLE RESPONSE, FORCED RESPONSE, RANDOMIZE 1-7]

1. Email
2. Mail
3. Phone
4. Text message
5. Television commercials
6. Social media
7. Local community-based organizations
0. Other, please specify [OPEN TEXT]

BARRIERS TO PARTICIPATION [ASK ALL]

Thank you for your answers so far. This next section will ask a few questions about how Ameren Illinois customers decide to electrify their home.

Q32. What concerns do you have about participating in Ameren Illinois' program to switch from propane to electric? Select all that apply. [MULTIPLE RESPONSE; FORCE RESPONSE; RANDOMIZE 1-14]

1. I do not have time to participate
2. I do not know enough about the program
3. I do not want a stranger in my home to perform the home assessment
4. I do not believe electrification will save me money
5. I do not believe electric heat pumps work well
6. Getting new appliances installed would be inconvenient
7. Installation costs would be too high
8. Ameren Illinois' incentives are too low
9. Electrification would not benefit my family
10. I prefer cooking with gas
11. I trust the person/business I purchase propane from
12. I know someone who had a bad experience switching from propane
13. My house would require costly upgrades to electrify
14. The cost of electricity keeps going up
0. Other Please Specify [OPEN END]
97. I have no concerns [EXCLUSIVE]

Q33. [ASK IF Q32 has more than one response] You indicated that you have the following concerns about participating in Ameren Illinois' program. Please select the concern that is the MOST important to you and your household. [SINGLE RESPONSE; FORCED RESPONSE]

1. <Pipe in Selections from Q32 >

Q34. What, if anything, would make you consider switching from propane to electric home heating? [OPEN ENDED RESPONSE]

Q35. To what extent do you believe Ameren Illinois will keep customers' best interests in mind when implementing the electrification program? [SINGLE RESPONSE FORCE RESPONSE]

1. Not at all
2. To a small extent
3. To a moderate extent
4. To a great extent

Q36. How many households do you know that have switched their home heating from propane to electric? [SINGLE RESPONSE FORCE RESPONSE]

1. 0
2. 1-2
3. 3-5
4. 6 or more

DEMOGRAPHICS [ASK ALL]

We are nearly done! The final section will ask a few questions about you and your household.

Q37. Do you own or rent your home? [SINGLE RESPONSE; FORCED RESPONSE]

1. Own
2. Rent
3. Other, specify [OPEN TEXT]
99. Prefer not to answer

Q38. What type of home do you live in?

1. Single-family detached – a standalone home that does not share walls with other units
2. Single-family attached – a home that shares one or more walls with neighboring units (like townhouses or duplexes)
3. Apartment building or condo with 2-4 units
4. Apartment building with 5 or more units
5. Mobile, manufactured, or prefab home
0. Other, please specify [OPEN END]
99. Prefer not to answer

Q39. Including yourself, how many people live in your household year-round? [NUMERIC; 1-20; FORCED RESPONSE]
99. Prefer not to answer

Q40. What is the main language spoken at home? If multiple languages are spoken at home, select the one that is used most often.[SINGLE RESPONSE; FORCED RESPONSE]

1. English
2. Spanish
3. Mandarin
4. Cantonese
5. Vietnamese
6. Hindi
7. Polish
0. Other language, please provide: _____
99. Prefer not to answer
    1. [OPEN ENDED RESPONSE]

CLOSING

Q41. Thank you for completing the survey. To thank you for your time and feedback, we would like to send you a $10 electronic gift card. Please provide your email address below. You should receive your gift card in one to two weeks.

0. Email: [OPEN END]
99. Prefer not to receive a gift card

Q42. On behalf of Ameren Illinois, thank you for taking the time to complete our survey. We really appreciate your feedback.

Please click the arrow to submit your response. Your survey will not be recorded as complete unless you click through the next screen. Once complete, you will be redirected to AIC's website.

[WEB SURVEYS: REDIRECT TO https://amerenillinoissavings.com/residential/energy-efficiency-home-upgrades/switch-from-propane-to-electric/]

APPENDIX C. PEER UTILITY INTERVIEW GUIDE

INTRODUCTION

Thank you for taking the time to chat with me today. My name is [interviewer name] and I am working with Ameren Illinois to evaluate their Income-Qualified Electrification channel. As part of this evaluation, we are speaking with managers of similar programs at other utilities to understand how they implement these programs.

We are particularly interested in how your program targets potential participants and which marketing and outreach efforts you have found to be effective. Please rest assured that all your answers will be kept confidential, and we will de-identify all responses to ensure that they cannot be traced back to you or your company.

You are welcome to skip any questions you are unsure about, and you can choose to end your participation at any time. If you have no questions or comments, we can go ahead and begin the interview. If possible, I'd like to record the interview to ensure my notes are accurate. Is it OK if I record? If not, I will still take written notes.

SCREENING [ASK ALL]

To begin, we would like to gather some general information about you and your program. Following that, we will explore targeting and identifying IQ customers for electrification, and then we will focus on marketing and outreach strategies. Finally, we hope to discuss issues related to awareness, accessibility, and barriers to participation. Let's start with some introductory questions:

Q15. Please describe your title and role in the program.
1. Have you done other work specifically regarding IQ electrification?

[TERMINATE IF NO WORK IS RELATED TO IQ ELECTRIFICATION] Thank you for your time. We were hoping to speak with the person in your organization who have worked directly with IQ electrification programs. Would you be able to provide us with their name or contact info?]

TARGETING AND IDENTIFICATION [ASK ALL]

Thanks for providing us with general information about your electrification program. Now let's discuss your program's targeting and identification efforts.

Q16. Could you provide a high-level summary of the program, including its goals, and the strategies used to achieve them?

[Probe For]

1. What specific services does your program provide?

2. How does this program/channel relate to other programs offered by your company, and other organizations, including Community Action Agencies?
   a. Community relationships
   b. Cross program support (e.g. financial support programs at the company)
   c. Other utilities/energy organizations

Q17. Could you walk me through the ideal customer journey through the program?
[Probe For Differences by customer type or for referred customers]

Q18. Could you explain the target audience for your electrification program? Who would be the ideal participant from your perspective?

Q19. How does your electrification program identify <targeted fossil fuel> IQ customers for your IQ electrification program?

1. Has this always been the case? If the targeting for this program changed, for what reasons do the program make the change?

2. How successful has this identification strategy been in finding IQ and <target fossil fuel> customers? Please describe any notable successes and challenges.

3. What types of participants have been easiest and hardest to reach? Why?

4. What data, metrics, or tools does the program use to support identification?

MARKETING AND OUTREACH [ASK ALL]

Great, now we are interested in what happens after <targeted fossil fuel> IQ customers are identified. These next few questions are related to marketing, outreach, and awareness/acceptance among potential participants.

Q20. What are the major marketing strategies that this program utilizes to inform potential participants about electrification, and what is the rationale for these strategies? [*Interviewer: be sure to assess targeted v. general population marketing*]

1. What type of marketing materials are you using?

2. Through which "channels" is the marketing material delivered?

3. How are potential participants selected to receive specific channel and material combinations (e.g., email A vs. letter X)

4. To what extent is content tailored to different customer groups? Has this been effective? Why or why not?

Q21. What benefits of your electrification program do you highlight to potential participants to get them interested in electrification?

1. Which of these benefits seem to be the most persuasive for customers?

2. Have any other possible selling points for the program proved unpersuasive or unmotivating for potential participants?

Q22. From your perspective, which marketing effort has been the most effective at informing or persuading potential participants about electrification?

1. What data indicators or metrics are you using to make this evaluation?

Q23. What changes, if any, would you suggest for the current marketing strategies or materials, and what motivates those suggestions?

AWARENESS AND ACCEPTANCE [ASK ALL]

Q24. Prior to program participation, how aware would you say the targeted population is of the benefits of electrification?

1. How would you say awareness of electrification among customers targeted for the electrification program has changed since starting the program?

Q25. After you inform potential participants about the program, how accepting are they of the benefits of electrification? Do potential participants tend to accept that electrification will benefit them or their household?

1. Are there any concerns that potential participants consistently raise when learning about the benefits of electrification?

BARRIERS AND ADDRESSING BARRIERS [ASK ALL]

We are coming to the final section of our interview. Thank you for your responses so far. We'd like to have a general discussion about any barriers you've encountered while implementing the program, beyond what we have already discussed, and how you or your team have addressed them, or think they could be addressed.

Q26. What would you say are the most significant barriers to awareness of electrification within the population?
1. How could (or does) the program address them?

Q27. In our assessment of various income-qualified programs, we frequently observe that the types of measures and services offered can pose a considerable challenge to participation, particularly when customers need upgrades beyond the program's scope to fully benefit. Have you found this to be a significant barrier for participants in your program?

1. Are participants who need health and safety upgrades at greater risk of becoming ineligible due to program H&S spending limits, or other relevant incentive structures?

Q28. Another potential barrier to participation in programs such as these can be the application and income qualification processes. Who handles this paperwork?

[Probe For]
1. Program staff, CAAs, customers, or other

2. Has validating income requirements proved challenging in any way for customers or staff? If so, can you describe any challenges and how they are addressed?

Q29. Beyond general awareness and acceptance, what are some of the barriers you and your team have encountered when trying to implement the program that we haven't already discussed? What are some of the reasons a customer may not participate even if they qualify?

1. Have you received customer feedback about the program? If so, what is the nature of that feedback?

2. Have you received any feedback from CAAs/CBOs or other stakeholders about the program?

3. Do you think there are any behavioral reasons or consumer preferences keeping potential customers from electrifying?

4. Have trust issues been a significant barrier? Do customers generally believe they can save money; or do they distrust utilities, or do not want to have a stranger in their home?

5. Are there any other significant barriers that we have not discussed yet?

[Follow Up]

1. We just discussed a few barriers that your program has encountered. Have any program activities been particularly effective or ineffective at addressing some barriers *[Prime some of the barriers they mentioned if they struggle*]?

2. How would you change your approach to addressing barriers, if at all?

Q30. What additional successes and challenges have you and your team encountered in this program that we haven't yet discussed?

1. In terms of targeting and marketing strategies, what key successes and challenges have emerged that were not previously covered?

Q31. What changes would you suggest, if any, to reduce barriers and increase participation that we haven't already discussed?

CLOSING

That's all the questions I have for now – thank you for taking the time to speak with me and share your perspective.

Before we wrap up, is there anything we didn't cover that you think is important to mention?

And finally, if anything else comes to mind after this conversation, feel free to reach out or pass it along through your team — we really appreciate your input as we continue learning more about electrification programs. In addition, would it be okay if we reach back out to you if any further questions come up?

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