



Opinion **Dynamics**

AMEREN ILLINOIS COMPANY

NON-PARTICIPATING CONTRACTOR STUDY

FINAL
MARCH 31, 2025



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I. EXECUTIVE SUMMARY

Ameren Illinois Company's (AIC) Program Ally network has historically experienced a shortage of qualified contractors in several technical areas, such as experience with weatherization and heat pump water heaters (HPWH), as well as coverage in less populated regions of the territory. AIC commissioned this study to identify ways to strategically expand the Program Ally network to address these gaps and ultimately serve more customers.

We reviewed secondary data, such as Program Ally recruitment materials, and conducted interviews with AIC staff who were knowledgeable about and/or were involved in Program Ally network recruitment or maintenance to identify key priorities and needs for the network. We then surveyed 215 contractors who served customers in the AIC service territory but were not actively participating in the Program Ally network. Our sample frame was based on two groups of non-participating contractors: (1) contractors who were not registered in AIC's Program Ally network and (2) registered Program Allies who had not completed any projects for an AIC program in 2023 or 2024 based on AIC program tracking data. The majority of survey respondents represented smaller companies (10 or fewer employees) located in Central Illinois. More than half of them (56%) self-identified as diverse vendors, as defined by AIC.¹

I.I KEY FINDINGS AND RECOMMENDATIONS

Below, we present our key findings and recommendations for AIC to help expand its Program Ally network.

- **Finding 1:** Most unregistered contractors were unaware of the Program Ally network prior to taking the survey. This indicates that AIC recruitment efforts are not reaching a significant segment of contractors who serve its territory, thus missing opportunities to strengthen the network and its service coverage. Overall, social media was the least common source of network awareness and was also found to be the least influential factor in contractors' decision to enroll.
 - **Recommendation:** Explore data sources that house information for contractors serving the AIC territory (e.g., Illinois Commerce Commission [ICC] Energy Efficiency Installer database) to further build out AIC's Program Ally recruitment lists for email and phone outreach. Look into data sources for contractors located in neighboring states to ensure those who commonly travel into Illinois to serve AIC customers are aware of the network and its benefits.
 - **Recommendation:** Review the time and effort AIC staff invests in social media marketing and determine whether it is worthwhile given its limited impact on contractor awareness.
- **Finding 2:** Contractors find support services closely linked to financial growth, such as incentive offerings and project leads, most attractive. Although highly valuable, project leads were the network benefit contractors were least familiar with, suggesting this support service is not properly emphasized in AIC Program Ally network marketing materials. Co-branded marketing materials were the least attractive perk to registered and unregistered contractors. Nearly one-quarter of respondents registered in the network (23%) were uncertain or unaware of any available support services, indicating a lack of effective communication overall regarding the benefits accessible to Program Allies.
 - **Recommendation:** Emphasize support services uniquely available to Program Allies in network marketing and outreach materials and highlight benefits supporting business growth, such as project leads. Additional project leads could help expand contractors' customer bases and ultimately increase their earnings—advantages that would likely influence their participation in the network. Work with AIC's marketing

¹ Diverse vendors are defined by AIC as businesses or organizations owned by racial or ethnic minorities, women, veterans, and differently abled and LGBTQ+ people.

department to develop language emphasizing the potential financial benefit of participating in the Program Ally network. If made aware of this desirable perk, some contractors may also be more willing to endure challenging aspects of participating, such as burdensome incentive paperwork.

- **Recommendation:** Review the amount of time AIC staff spend developing co-branded marketing materials and assess whether this level of effort makes sense considering the lack of interest expressed by contractors. Examine both the time it takes to develop approved co-branding templates as well as coordinate with Program Allies using the materials (e.g., technical support, review).
- **Finding 3:** The administrative burden was the top barrier preventing contractors from participating (among registered contractors) and enrolling (among unregistered contractors) in the Program Ally network. Registered contractors also expressed concerns about the time commitment associated with participating, while unregistered respondents indicated uncertainty about registration requirements and participation expectations. When asked about additional support services that could encourage network participation, contractors emphasized the need for clearer processes, more training, and additional administrative support.
 - **Recommendation:** Explore ways to simplify network participation for contractors to reduce the administrative burden and overall time commitment. Required administrative tasks are a particularly difficult barrier for smaller firms that are less likely to have designated administrative staff. Investigate ways to streamline steps in the participation process, such as the project handoff, incentive application, or rebate payout, to make the overall experience less time-intensive. Mitigating these issues would not only address the primary barriers preventing contractors from enrolling and participating in the network, but it could also positively affect contractors' word-of-mouth communication about the network and thus further influence network participation.
 - **Recommendation:** Provide more detailed information about the registration requirements and participation process in network marketing and outreach materials, particularly when recruiting new contractors for the Program Ally network. AIC can help alleviate primary enrollment barriers by better informing contractors about the network and ensuring they have realistic expectations, such as the travel required to reach customer sites.
- **Finding 4:** Contractors primarily served the Central Illinois region but were willing to travel further for more lucrative jobs. Contractors are typically more willing to travel longer distances for jobs with a higher earning potential; we found that 12% were willing to travel more than 50 miles for a small-priced job and 68% were willing to travel at least this far for a large-priced job or multiple smaller jobs. Travel requirements were the top barrier to serving customers in less populous, more rural areas of AIC territory, followed by difficulty with sales outreach to customers in these areas.
 - **Recommendation:** Explore how financially feasible it would be to offer travel stipends to Program Allies for projects in certain areas of the service territory to offset travel costs. Alternatively, consider offering Program Allies enhanced incentives for project sites in specific hard-to-reach areas to make the longer travel more financially worthwhile.
 - **Recommendation:** Consider ways to generate larger project opportunities for Program Allies in rural, harder-to-reach areas. Avoid smaller, one-off projects, like a single advanced thermostat installation for the Smart Savers channel, that require contractors to travel more than 25 miles to the customer site.
 - **Recommendation:** Provide additional marketing and outreach support for contractors in less populated regions. This could include partnering with local community-based organizations (CBO) that are better positioned to find and communicate directly with customers and likely have a more trusted reputation in the community. AIC and CBO marketing efforts could help lay the groundwork for program awareness and generate project leads for Program Allies in hard-to-reach areas, thus streamlining the process of serving these customers.

- **Finding 5:** Most registered contractors who served the commercial sector provided HVAC services. Registered respondents also commonly had experience with commercial refrigeration services. Both of these are priority areas for network expansion.
 - **Recommendation:** Leverage existing relationships with registered contractors to promote stronger participation in the Business Program Ally network for HVAC and refrigeration projects. Attempt to streamline the initial participation of these contractors by reaching out to them with project opportunities that are ready to hand off to them to highlight how easy the process can be. Marketing and outreach materials should also emphasize influential network benefits, such as access to incentives and project leads.
- **Finding 6:** Residential plumbing is another priority service area for expansion. Among those who served the residential sector, registered contractors were more likely to provide plumbing services. Despite this, unregistered contractors had considerably more experience working with HPWHs, including systems for single family homes and larger, centralized systems typically used in high-rise multifamily buildings.
 - **Recommendation:** Conduct network outreach to registered and unregistered contractors identified in the survey as having relevant HPWH experience. AIC should also consider offering additional training opportunities for installing HPWHs, particularly larger systems fit for commercial and industrial customers, or monetary support toward HPWH training registration or certification fees. By offsetting this cost, AIC can help contractors advance their knowledge in this area and provide them with relevant projects to demonstrate their new skills. Marketing and outreach materials should emphasize influential network benefits, such as access to incentives and project leads.
 - **Recommendation:** Consider offering a “sign-on” bonus for new contractors who enroll in the Program Ally network who have an up-to-date HPWH certification to encourage participation among contractors who already have this skill set.
- **Finding 7:** The remaining priority services for network expansion are weatherization and health and safety remediation. Weatherization services seem generally lacking in the market, although unregistered contractors across both sectors more commonly held the requisite skill set. On the residential side, unregistered contractors had stronger health and safety remediation skill sets than registered respondents.
 - **Recommendation:** Provide registered contractors with weatherization and health and safety remediation training opportunities to strengthen these skill sets in the network. AIC should also target unregistered contractors who offer weatherization and/or health and safety remediation services with network recruitment efforts, particularly those who indicated they were likely to join the network in the future. If made available to the network, these training opportunities should be highlighted in recruiting materials as they could further incentivize unregistered contractors who typically provide these services to enroll to gain access and expand their knowledge base.
 - **Recommendation:** Consider offering a “sign-on” bonus for new contractors who enroll in the Program Ally network who have an up-to-date BPI Building Analyst certification. This certification is a prerequisite to completing projects for AIC’s Income Qualified Initiative, as it equips contractors with the knowledge and skills needed to provide weatherization services.

2. INTRODUCTION

AIC relies heavily on its Program Ally network to deliver energy-saving measures to customers in its utility service territory. AIC defines a “Program Ally” as a contractor who has participated in all necessary registration and training requirements to provide services incentivized by an AIC energy efficiency program.² The Program Ally network has historically experienced a shortage of qualified contractors in several technical service areas, such as weatherization and HPWHs, as well as coverage in less populated regions of the territory.

The overarching goal of this study was to identify opportunities to grow the Program Ally network supporting AIC’s Residential and Business Programs. We assessed the types of services unregistered contractors (i.e., those not registered as a Program Ally) and “inactive” Program Allies (i.e., Program Allies who have not completed a project in recent years) offer to customers and how those compare with the current needs of AIC’s Program Ally network. We investigated opportunities and barriers to joining the network or increasing participation among inactive Program Allies or contractors.³ In support of other AIC strategic priorities and initiatives related to diverse workforce development, we also assessed ways to increase network participation among diverse contractors.⁴ In addition to this, we explored opportunities to further develop the Program Ally network in underserved geographic areas, such as rural communities in Southern Illinois.

2.1 STUDY OBJECTIVES

Opinion Dynamics sought to help AIC understand how to expand the Program Ally network and reduce barriers to participation for contractors. Specifically, the primary objectives of this study were to complete the following:

- Identify the services contractors offer their customers and the extent to which they align with AIC’s priorities for expanding program services
- Identify the top barriers to joining the Program Ally network (for non-participating contractors) or increased participation (for inactive Program Allies) and whether the barriers differ for diverse contractors or contractors in underserved areas
- Understand the top motivators that led current Program Allies to join the network
- Assess how frequently contractors work in underserved, priority regions and what barriers they face to serving those areas
- Assess the extent to which AIC’s marketing, education, and outreach (ME&O) efforts are reaching contractors
- Determine how influential contractors find the information provided in ME&O materials when deciding whether to join the Program Ally network
- Gauge awareness of specific Program Ally network support services and the extent to which those services motivate contractors to participate⁵

² In AIC’s internal discussions and annual evaluation reports, residential and business offerings are categorized as programs, while individual offers are referred to as initiatives or channels. To remain consistent with the Program Ally terminology, we refer to all AIC offerings as “programs” throughout this report.

³ In some cases, contractors complete AIC energy efficiency projects without being a registered Program Ally.

⁴ Diverse vendors are defined by AIC as businesses or organizations owned by racial or ethnic minorities, women, veterans, and differently abled and LGBTQ+ people.

⁵ Examples of support services include co-branded marketing materials, access to rebates and incentives, and project leads.

3. METHODOLOGY

To assess key priorities and needs for the Program Ally network, we first reviewed secondary data and conducted interviews with AIC staff who were knowledgeable about and/or were involved in network recruitment or maintenance. Our secondary data review included Program Ally recruitment materials and strategies provided by AIC, along with Residential and Business Program Ally network tracking data. Based on the data review and discussions with AIC staff, our team identified specific Residential and Business network priorities, including particular knowledge and skill sets of contractors, as well as regional priorities for network growth and expansion (i.e., areas where customers are typically underserved or network recruitment efforts are most challenging). The network priorities we identified are listed below.

Regional Priorities

- Southern Illinois, which, for the purposes of this study, comprises the area identified in Figure 1.⁶ Throughout this report, we refer to AIC service territory outside this region as “Central Illinois.”
- Low-population counties across AIC service territory, defined for the purposes of this study as those with a population of 20,000 or less.⁷ Using this cutoff, we identified 45 low-population counties, many located in the Southern Illinois region defined above. A full list of the low-population counties can be found in Appendix A.

Residential Network Priorities

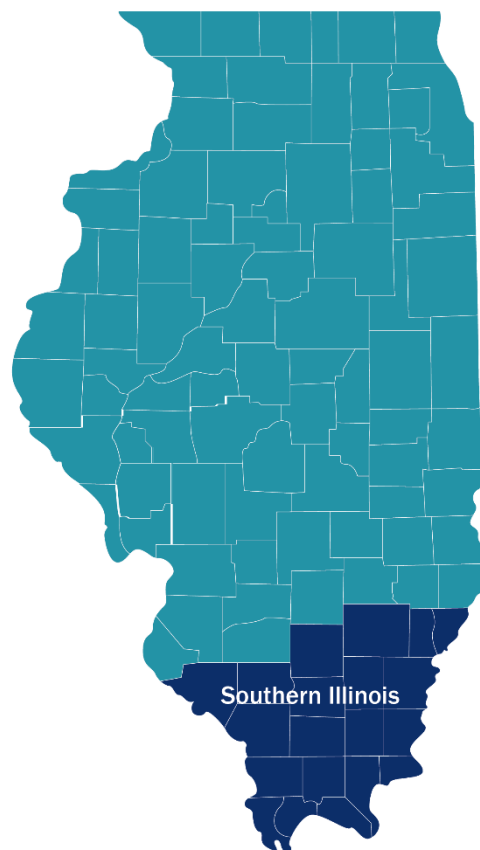
- Plumbers, particularly those with experience installing HPWHs
- Health and safety remediation services (e.g., address issues related to mold or moisture that must be fixed prior to installing other energy efficiency upgrades)
- Weatherization

Business Network Priorities

In general, contractors who provide non-lighting services, most specifically those with expertise in the following areas:

- Commercial refrigeration
- Heating, ventilation, and air conditioning (HVAC)
- Weatherization
- Ability to work on large commercial or industrial projects or have existing close working relationships with large commercial or industrial customers.⁸

Figure 1. Southern Illinois Region



⁶ Findings from the 2021 AIC Empower Communities Study support this regional priority; significant gaps in Program Ally geographic coverage were identified in the Southern Illinois region. Ameren Illinois Company Empower Communities Study Final Report. July 11, 2022. <https://www.ilsag.info/wp-content/uploads/AIC-Empower-Communities-Study-Final-Report-FINAL-2022-07-11.pdf>

⁷ 2022 American Community Survey. <https://www.cubitolanning.com/citations/demographicsby-v2023>

⁸ Administrative tasks for larger commercial projects, such as longer bidding cycles or specific insurance qualifications, require larger Program Ally companies equipped to meet these requirements. The 2022 AIC Multifamily Process Evaluation results also highlighted how staff capacity and

Prior to fielding the survey, our team developed a memo proposing our approach to survey contractors not actively participating in the Program Ally network. This memo was reviewed and approved by AIC staff prior to survey fielding.

3.1 CONTRACTOR SURVEY

We surveyed contractors who serve customers in AIC service territory but were not actively participating in the Program Ally network. Our sample frame was based on two groups of non-participating contractors: (1) contractors who were not registered in AIC’s Program Ally network and (2) registered Program Allies who had not completed any projects for an AIC program in 2023 or 2024 based on program tracking data provided by AIC on October 14, 2024. We utilized non-AIC data sources, including the Dun & Bradstreet Hoover database⁹ and the ICC Certified Energy Efficiency Installers database,¹⁰ to establish our sample frame of contractors *not* registered in the network. We used a census approach to draw our sample of unregistered and registered but *inactive* contractors. Of the 10,857 contractors included in our sample frame, 8,552 were not registered in the network at that time, and 2,305 were registered but inactive (Table 1).

Table 1. Sample Data Sources by Registration Status

Source	Registered	Unregistered	Total
Dun & Bradstreet Hoover	–	6,148	6,148
ICC Certified Energy Efficiency Installers Database	–	2,404	2,404 ^a
Residential Program Ally Tracking Data	372	–	372
Business Program Ally Tracking Data	1,933	–	1,933
Total	2,305	8,552	10,857

^a Utility territory location data was not available in the sample database; therefore, this count may include some contractors who solely serve customers outside of AIC’s service territory.

In January and February 2025, we contacted these non-participating contractors via email or text. Contractors were invited to complete the survey via email when an email address was available (n=5,412) and sent up to four email reminders. When an email address was unavailable, or the email invitation was returned as undeliverable, we sent contractors an invitation via text message. Due to the higher cost and lower response rate observed for text messaging, we limited this outreach to the initial invitation and did not send text reminders. We began by offering contractors a \$30 gift card as a token of appreciation for completing the survey. We increased this amount to \$50 during survey fielding to encourage a stronger response rate.

Of the 10,857 contractors we invited to take the survey, 216 completed it, which yielded a 2.4% response rate.¹¹

The majority of surveyed contractors were not registered in the Program Ally network at the time of fielding (61%). Most respondents served both commercial and residential markets (Table 2); a minority exclusively served residential (6%) or commercial customers (12%). Given the substantial overlap between contractors who served the residential and commercial markets, we did not test for statistically significant differences between these groups.

willingness to take on large projects are critical growth barriers for the Program Ally network. 2022 AIC Multifamily Initiatives Process Evaluation Results. November 1, 2023. <https://www.ilsag.info/wp-content/uploads/2022-AIC-Multifamily-Initiative-Process-Evaluation-Findings-Memo-FINAL-2023-11-01.pdf>

⁹ Dun & Bradstreet is one of the world’s leading suppliers of business information and research. Its global database holds the largest volume of business-credit information in the world.

¹⁰ The ICC database houses company information for all persons or entities that have obtained a certification to perform installations of energy efficiency measures in the state of Illinois.

¹¹ Response rate is calculated using American Association for Public Opinion Research (AAPOR) Response Rate 3.

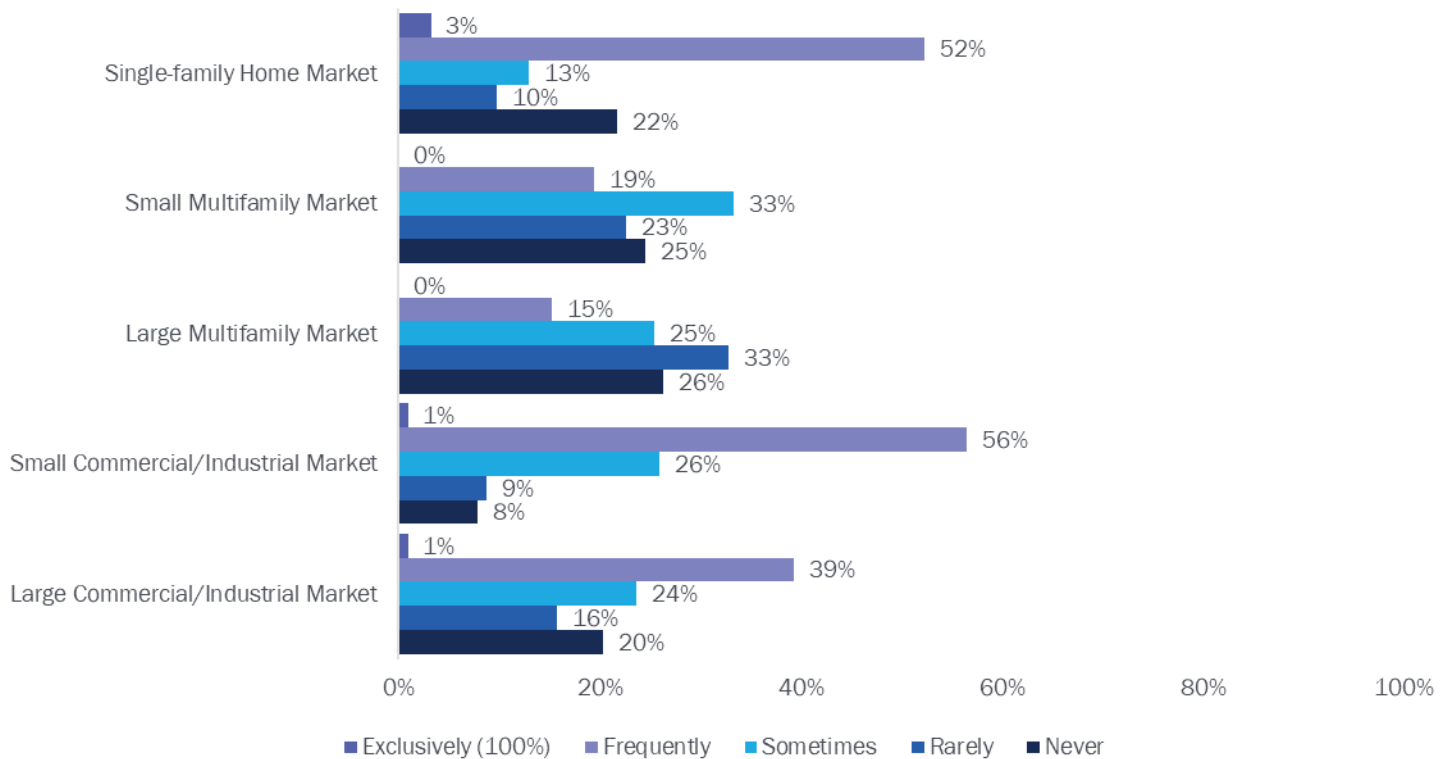
Table 2. Surveyed Contractors' Market(s) Served by Network Registration (n=215)

Registration Status	Residential Only	Commercial Only	Serves Both	Total
Registered	2	15	68	85
Not Registered	11	11	108	130
Total	13	26	176	215

Note: Analysis excludes one unregistered contractor who provided an invalid response.

More granularly, surveyed contractors rarely served one market subsegment exclusively. Respondents most frequently served single family residential and small commercial markets (Figure 2). Most contractors (64%) had considerable experience serving the large commercial market, sharing that they served these larger properties at least “sometimes.” Respondents least commonly served multifamily properties; over half (59%) of contractors reported they “rarely” or “never” served large multifamily properties (i.e., five or more units), and about half (48%) said the same for small multifamily properties.

Figure 2. Frequency of Markets Served (n=216)



Note: Multiple responses allowed.

Most surveyed contractors (65%) worked for smaller firms with 10 or fewer employees. Less than one-fifth (17%) worked for sizeable companies with 26 or more employees, while only 11% of contractors reported their company has more than 50 employees (Table 3).

Table 3. Number of Employees by Survey Respondent (n=215)

Number of Employees	Residential Only (n=13)	Commercial Only (n=26)	Serves Both (n=176)	Total Percent of Respondents
Sole Proprietor	2 (15%)	2 (8%)	13 (7%)	17 (8%)
2-5	9 (69%)	8 (31%)	67 (38%)	84 (39%)
6-10	1 (8%)	1 (4%)	37 (21%)	39 (18%)
11-25	1 (8%)	3 (12%)	34 (19%)	38 (18%)
26-50	0	3 (12%)	10 (6%)	13 (6%)
More than 50	0	9 (35%)	15 (9%)	24 (11%)
Total	13 (100%)	26 (100%)	176 (100%)	215 (100%)

Note: Total count excludes one unregistered contractor who provided an invalid response regarding the sector they serve. This contractor indicated they work for a firm with 2-5 employees.

Survey respondents were asked if they would describe their company as a diverse vendor, which AIC defines as “businesses or organizations owned by racial or ethnic minorities, women, veterans, differently abled, and/or LGBTQ+ individuals.” Notably, over half (56%) of respondents self-identified as diverse vendors.

Survey respondents were also asked to identify where their primary office is located. Most (89%) reported their office was based in the Central Illinois region, while the remaining were located in Southern Illinois or a bordering state (Table 4). Figure 1 in the Methodology section provides a map outlining the region we define as Southern Illinois for the purposes of this study.

Table 4. Primary Office Location (n=216)

Region	Percent of Respondents
Central Illinois	89%
Out of State	8%
Southern Illinois	3%

3.1.1 LIMITATIONS

The data and findings from this research are subject to a number of important sources of bias and analysis limitations:

- **Nonresponse bias:** Based on the low response rate we observed, responses may disproportionately represent individuals who are simply more likely to complete surveys.
- **Self-report bias:** There is the potential for respondents to feel pressure to provide what they perceive as socially desirable responses, even if that answer may not truly reflect reality. This may include, for instance, responses related to the region where respondents provide services, the types of services offered or that they have experience with, and interest in participating in AIC’s Program Ally network. We implemented best practices in question design throughout the survey to mitigate the impact of self-report bias as much as possible.
- **Availability and reliability of contact information:** Although access to contact information is a common limitation to survey research, this tends to be especially difficult when trying to reach contractor populations. Many contractors, particularly sole proprietors and those who work for smaller firms, use their mobile phones for business communication and may not have an email listed. In other cases, multiple email addresses, an office phone, and multiple mobile numbers may be listed for the same company, making it difficult to ascertain which is optimal for outreach purposes and costly to attempt all communication types. On top of these considerations, a

large proportion of our data did not have an email address available. Since phone numbers can easily and frequently be changed, the only contact information available for these sample points may have been outdated. These challenges ultimately limited the number of completed surveys.

- **Sector comparisons:** Most contractors we surveyed served both residential and commercial markets. The degree of overlap between the two sectors hindered our ability to make meaningful comparisons between primarily residential-serving and commercial-serving contractors or to formulate conclusions about the differences between these two groups in many areas.
- **Unregistered contractor participation in AIC Initiatives:** Notably, contractors can participate and complete projects through some AIC Initiatives, such as the Retail Products and Midstream Initiatives, without being enrolled in the Program Ally network. Based on this, it is possible that unregistered survey respondents may have previously participated in an AIC Initiative and provided priority services, such as HVAC and water-heating.

4. DETAILED FINDINGS

This section discusses survey findings related to the markets contractors served and the services they offer.

4.1 MARKETS SERVED

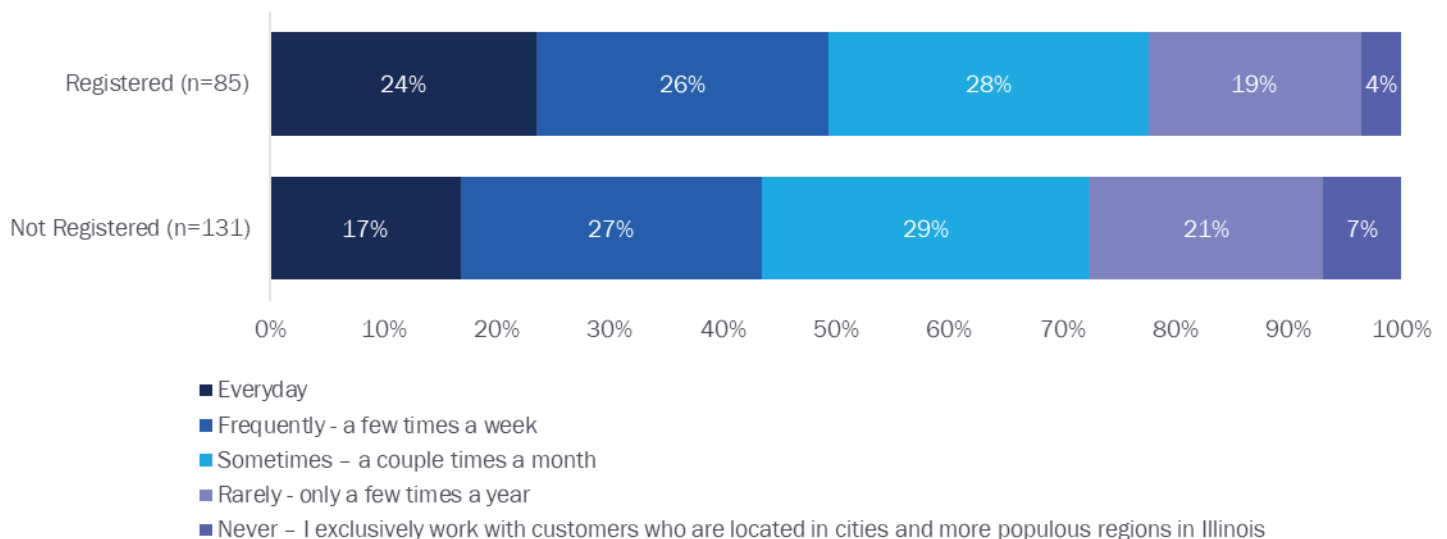
Most (90%) survey respondents primarily served counties in Central Illinois, while 9% of contractors served the Southern Illinois region (Table 5).

Table 5. Regions Served in Illinois (n=216)

Region	Percent of Respondents
Only Central Illinois	90%
Both Central and Southern Illinois	6%
Only Southern Illinois	3%
Not sure	1%

Nearly all contractors serve customers in less populated areas to some extent, with registered contractors serving these communities most frequently (Figure 3). Approximately half of registered and unregistered contractors reported serving less populated areas of AIC service territory at least a few times a week, although registered contractors were more likely to serve these areas daily. Just over one-quarter of respondents said they rarely or never work in less populated regions of AIC territory.

Figure 3. How Often Contractors Serve Less Populated Regions by Registration Status

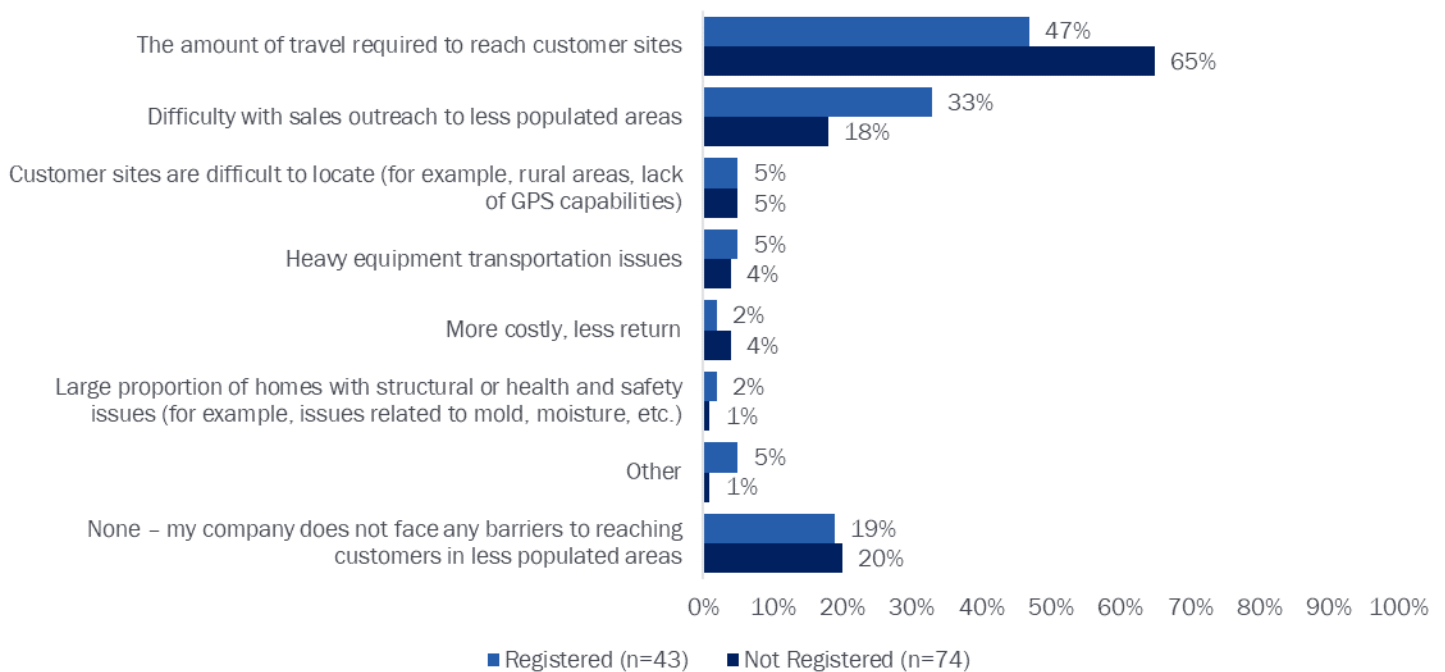


We asked contractors who reported they did *not* serve less populated regions daily what barriers prevented them from serving customers in these areas. **Surveyed contractors most commonly reported the travel required as a barrier to serving less populous regions (Figure 4).** This was identified as a more prominent barrier among unregistered contractors (65%) compared to those registered in the network (47%), a statistically significant difference. Although a distant second, the next most common challenge was difficulty with sales outreach to less populated areas. In contrast,

nearly twice as many registered contractors reported this as a barrier compared to unregistered contractors, indicating another statistically significant difference. These findings highlight how the physical location and limited public resources in rural areas pose significant challenges for contractors in reaching and serving customers.

Notably, about one-fifth of contractors reported no barriers to reaching customers in less populated regions, suggesting they may be more conveniently located and equipped to engage with these customers. As these contractors do not serve this customer segment daily, yet they experience no barriers in doing so, they may lack the desire to increase engagement with customers in these areas. When reviewing barriers, no distinguishable differences were observed between contractors who served Central Illinois versus the Southern Illinois region.

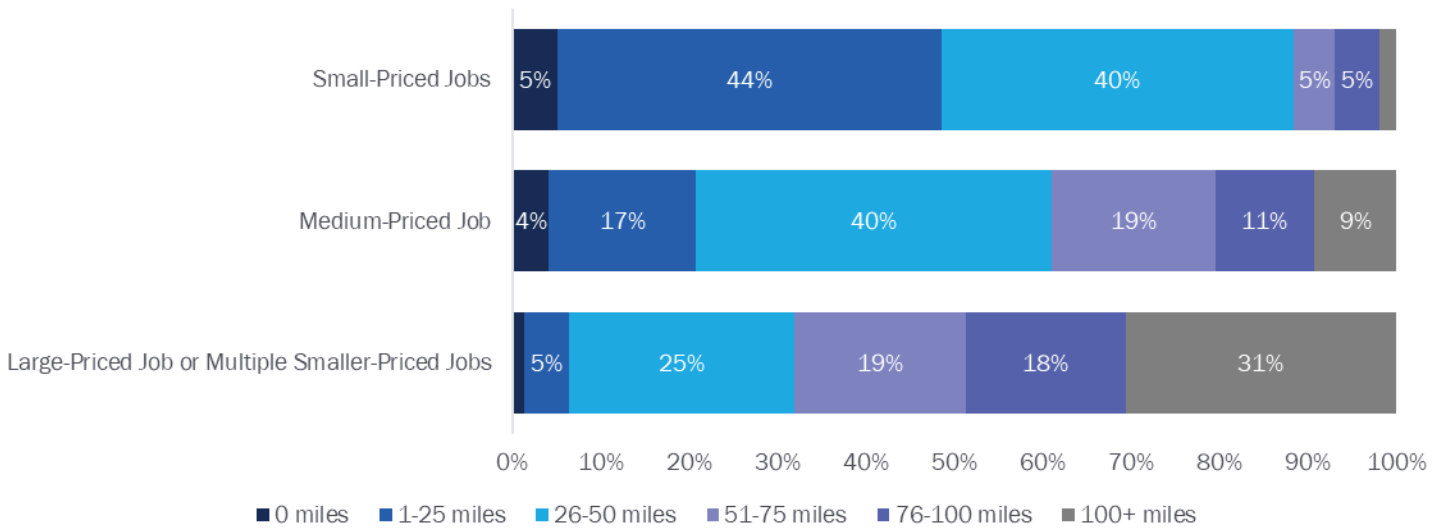
Figure 4. Barriers to Reaching Customers in Less Populous Regions



Note: Multiple responses allowed. Response option “None – my company does not...” is exclusive. “Other” responses included a lack of suitable customers (e.g., lack of industrial customers in these areas) and a focus on closer, more accessible markets that exclude less populated regions.

Contractors were willing to drive longer distances for higher-priced jobs (Figure 5). As the size and quantity of jobs increased, so did contractors’ willingness to travel. Only 12% of contractors were willing to travel more than 50 miles for a small job (e.g., smart thermostat installation), whereas over two-thirds (68%) were willing to travel at least this far for a higher-priced job (e.g., major retrofit or large commercial or industrial project) or multiple lower-priced jobs. This data suggests contractors are typically more willing to travel longer distances for jobs with a higher earning potential. Notably, out-of-state contractors were most likely to travel distances exceeding 100 miles, irrespective of job size.

Figure 5. Miles Willing to Drive for Job by Job Size (n=216)

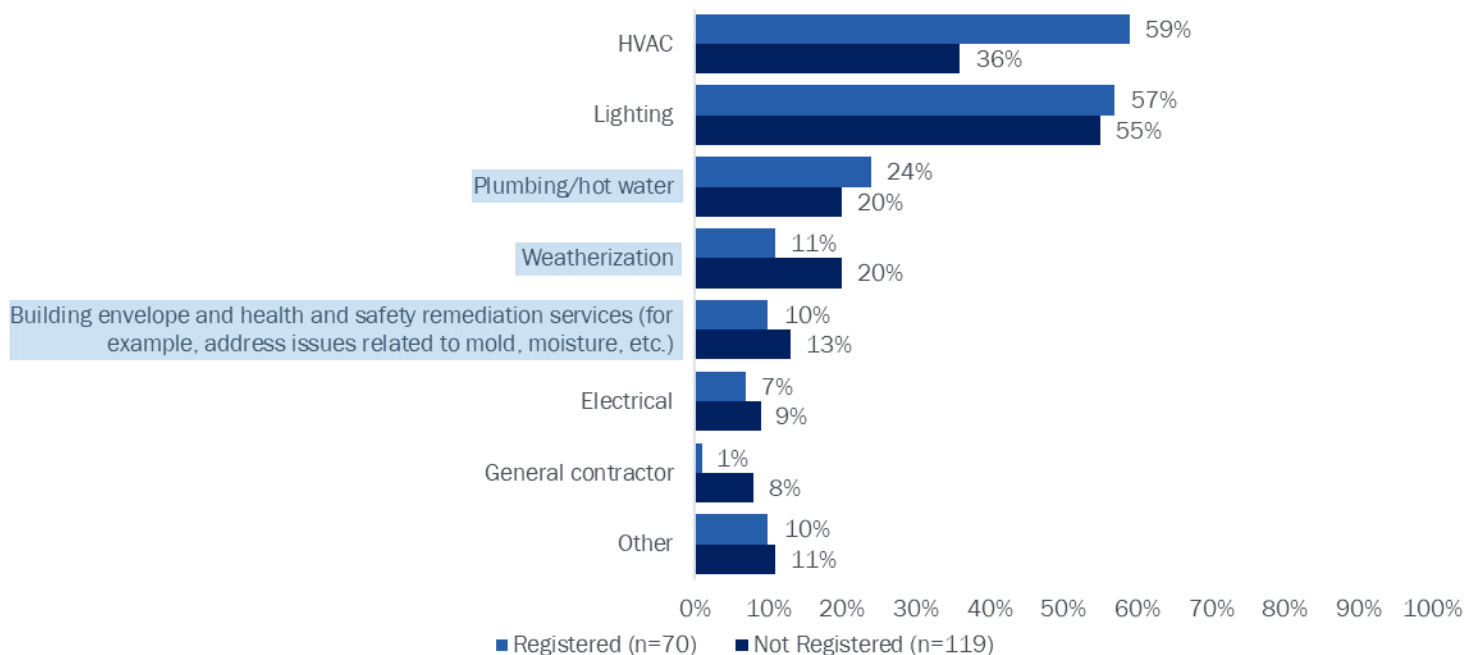


Note: Actual mileage may vary based on location, traffic conditions, and driving habits. Small-priced jobs referred to services such as a smart thermostat installation, medium-priced jobs included examples like weatherization or a furnace replacement, while a large-priced job referred to a major retrofit, work done on a multifamily property, or a large commercial or industrial project.

4.2 SERVICES PROVIDED

Residential contractors most commonly provided HVAC and lighting services, indicating a lack of coverage in priority service areas (Figure 6). Unregistered contractors were more likely to offer priority services like weatherization and health and safety remediation than their registered counterparts, while registered contractors were more likely to offer plumbing services.

Figure 6. Residential Services Provided by Registration Status

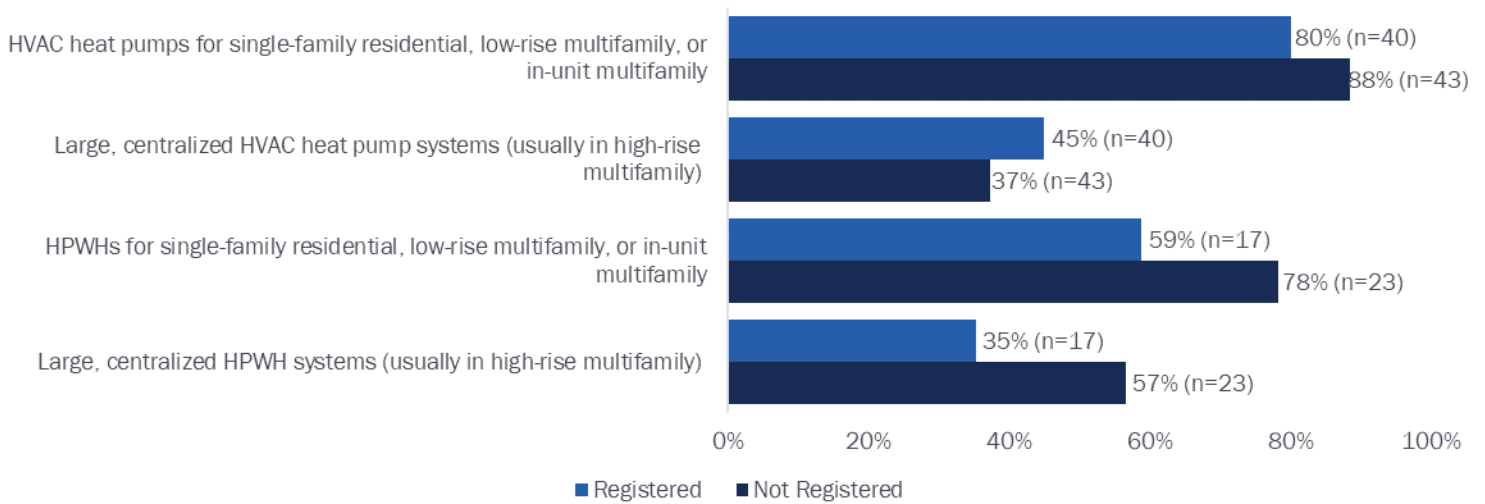


Note: Multiple responses allowed. Only asked of those that serve residential customers. Priority services identified for the residential network are highlighted in blue. “Other” responses included plowing, painting, solar, fencing, signage, roofing, and interior design

Respondents had the most experience installing heat pumps in single family or small multifamily properties (Figure 7). The majority of registered and unregistered contractors who offered residential HVAC services had experience installing HVAC heat pumps in smaller residential properties. Of those who provided residential plumbing services, unregistered contractors were more likely to have experience installing HPWHs, regardless of building type.¹²

¹² In some cases, contractors complete AIC energy efficiency projects without being a registered Program Ally. Due to this, it is possible that some unregistered contractors who reportedly had experience installing HVAC and water-heating heat pump equipment have installed this type of equipment through an AIC Initiative, such as the Retail Products or Midstream Initiatives.

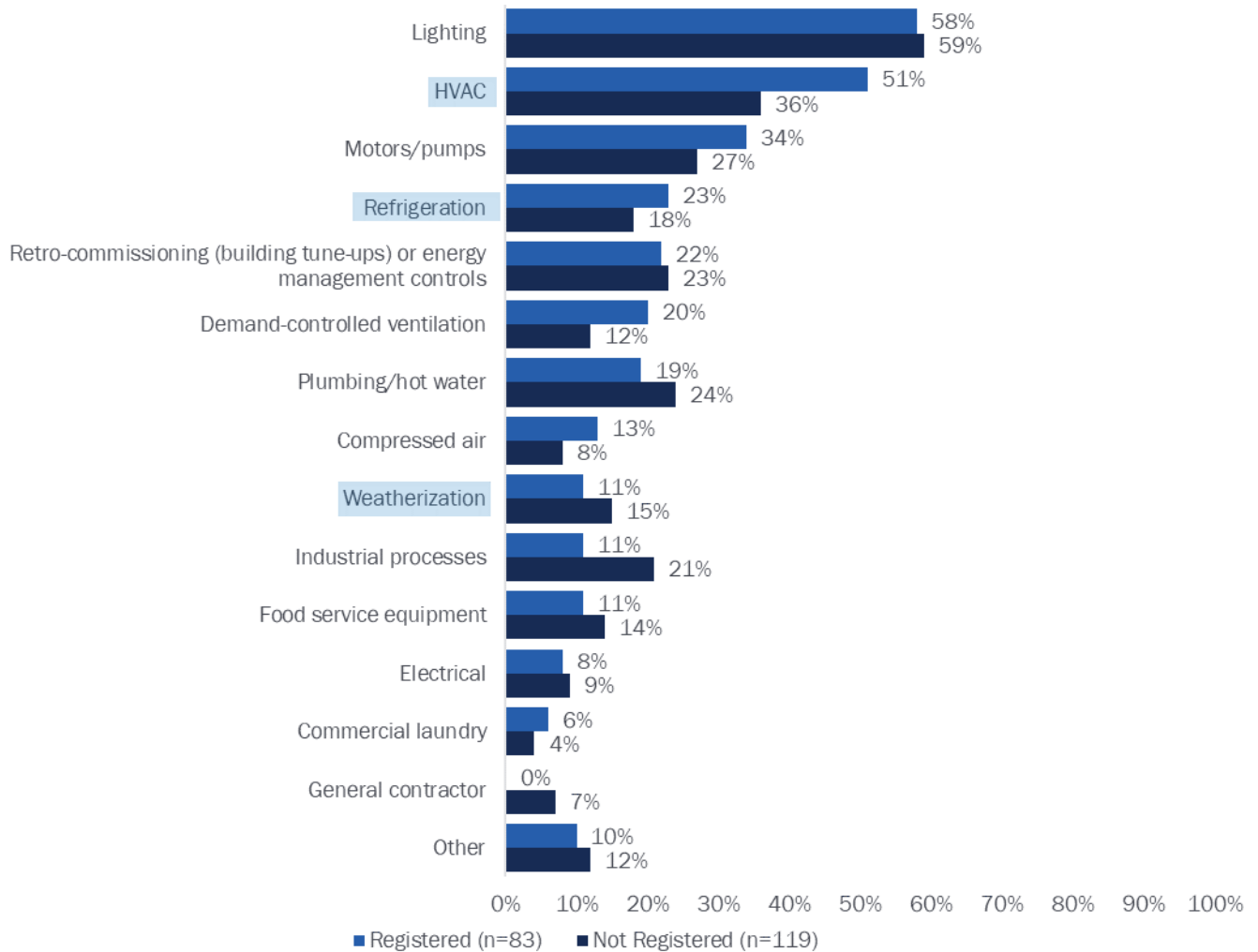
Figure 7. Experience Installing Heat Pump Equipment



Note: Only asked of residential contractors who reported offering HVAC (i.e., received HVAC heat pump questions) or plumbing services (i.e., received HPWH questions).

Commercial contractors commonly provided lighting and HVAC services, similar to what we observed with residential contractors (Figure 8). The proportion of registered and unregistered contractors who provided various services was fairly similar overall, although registered contractors were statistically more likely to offer HVAC services to customers. Although not statistically significant, registered contractors were also more likely to offer refrigeration, another priority service. Relatively few contractors offer weatherization services.

Figure 8. Commercial Services Provided by Registration Status

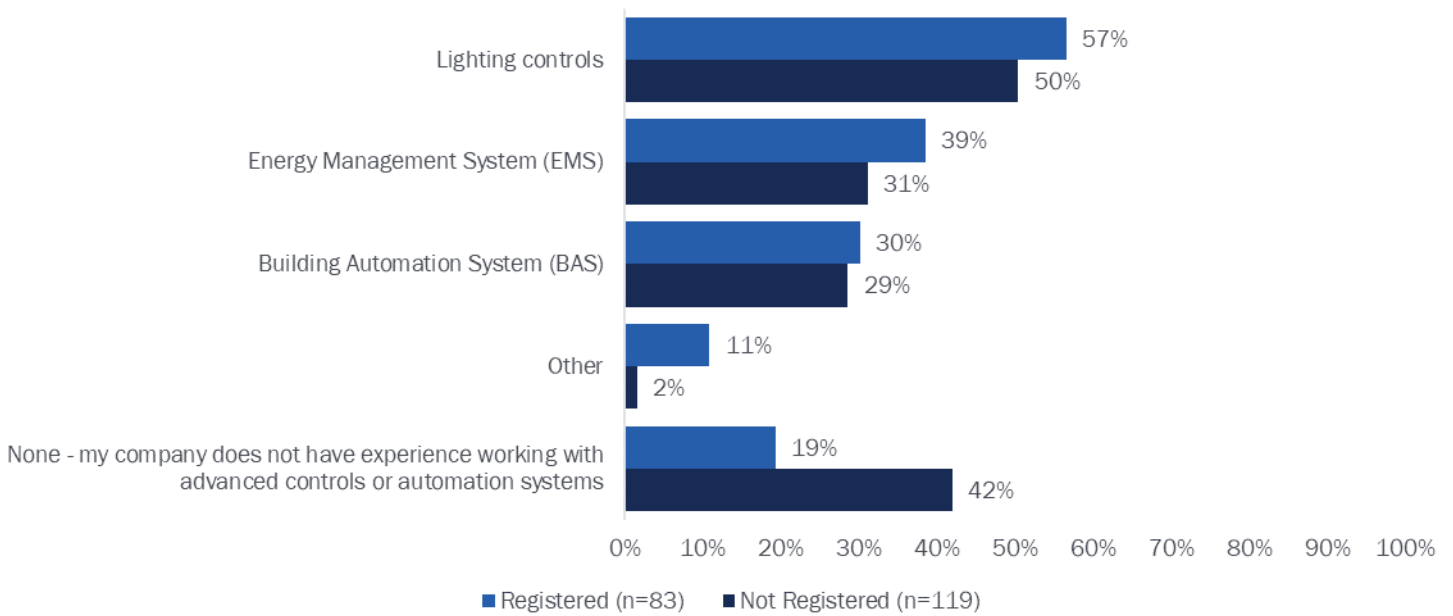


Note: Multiple responses allowed. Only asked of those that serve commercial customers. Priority services identified for the commercial network are highlighted in blue. “Other” responses included solar, painting, roofing, interior design, and concrete work.

Registered contractors were most likely to have experience working with advanced controls and systems (Figure 9). Lighting controls were the most common type of advanced control or system with which contractors had experience. Half (50%) of unregistered contractors also possessed this experience. Unregistered contractors were twice as likely to report having no experience working with advanced controls and systems compared to registered respondents, a statistically significant difference.

Notably, contractors who served the Southern Illinois region were statistically less likely to have experience with advanced controls or systems than those who served the rest of AIC’s service territory.

Figure 9. Experience Working with Advanced Controls and/or Systems



Note: Multiple responses allowed. Response option “None – my company does not...” is exclusive. Only asked of those that serve commercial or industrial properties. “Other” responses included Building Management Systems (BMS), surveillance and Audio Visual (AV), Biogas Combined Heat and Power (CHP), Supervisory Control and Data Acquisition (SCADA), retro-commissioning, directional boring, and automation on drying systems.

4.3 NETWORK PARTICIPATION AND BARRIERS

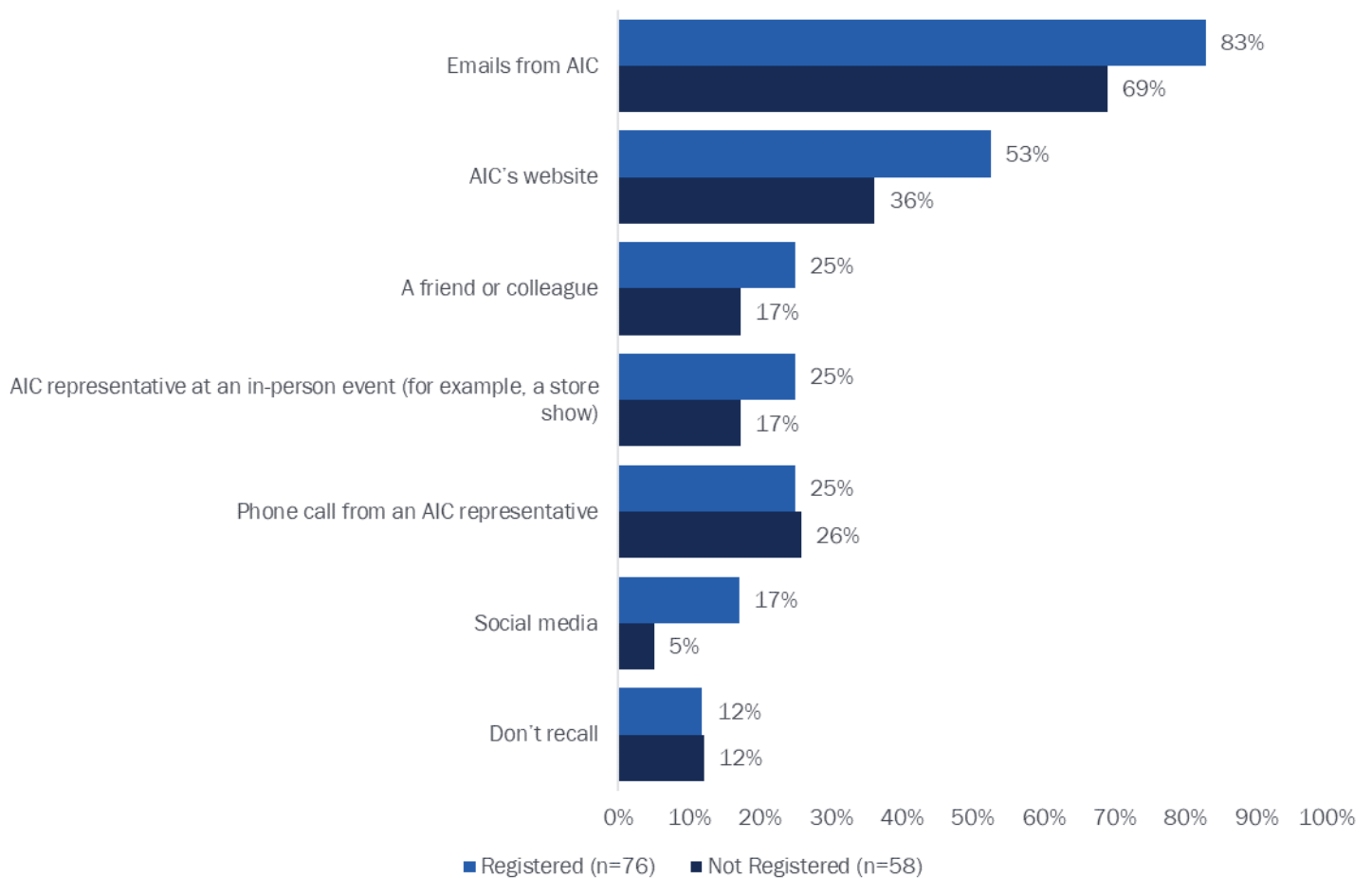
This section discusses survey findings related to contractors’ network awareness and barriers to network participation.

4.3.1 NETWORK AWARENESS

More than half (51%) of unregistered contractors had not heard of AIC’s Program Ally network prior to completing the survey, highlighting a substantial segment that AIC’s outreach efforts have not yet reached.

Registered and unregistered contractors who indicated they were aware of the Program Ally Network were asked to report the avenues through which they received information about the network. **Emails from AIC were by far the most common way contractors received information about the Program Ally network (Figure 10).** Registered contractors were more likely to have received information through most channels, including AIC emails and the AIC website. Based on their registration status, this is unsurprising, as established Program Allies are likely included in AIC email lists and visit the utility website more frequently. Furthermore, non-diverse contractors were statistically more likely to receive information through AIC’s website than diverse vendors.

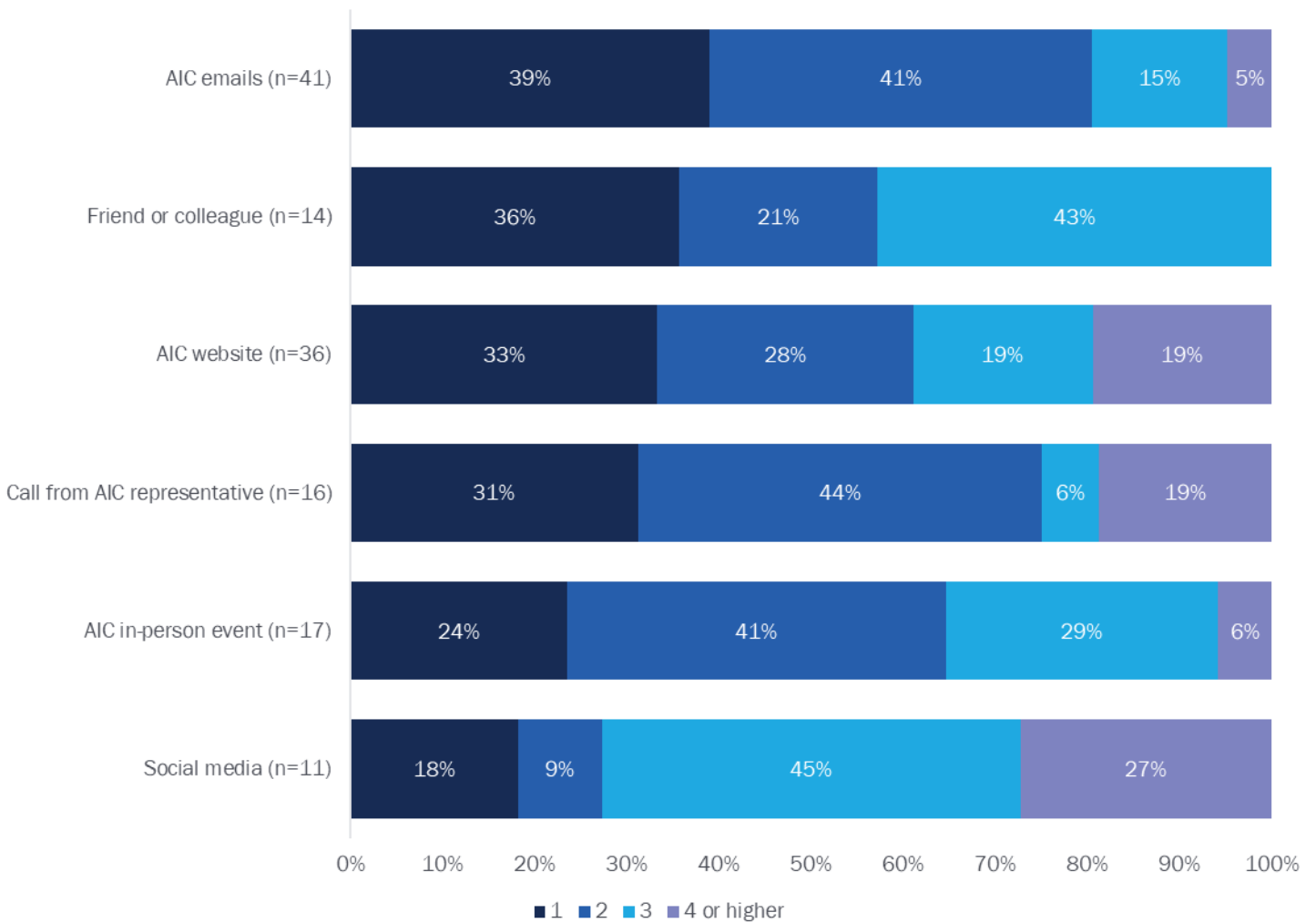
Figure 10. How Surveyed Contractors Received Information About Program Ally Network



Note: Multiple responses allowed. Response option “Don’t recall” is exclusive. Only asked of (1) registered contractors and (2) unregistered contractors who were aware of the Program Ally Network.

Contractors who recalled where they had received information about the Program Ally network were asked to rank each of these sources in order of the level of influence it played in their decision to enroll in the network. Contractors rated up to seven sources with ‘1’ indicating the source they felt was most influential (Figure 10). **Direct communications from AIC were highly influential in contractors’ decision to enroll in the Program Ally network (Figure 11).** At least 75% of respondents ranked both emails and phone calls from AIC among their top two most influential sources. Contractors who received information about the network through a friend or colleague found these personal connections highly influential in their decision to register as Program Ally.

Figure 11. Influence of Sources in Decision to Enroll in Program Ally Network



Note: A rating of '1' indicates the source that was the most influential.

4.3.2 BARRIER FOR REGISTERED ALLIES

Registered contractors were asked to confirm whether they had completed projects through an AIC program since 2023. Of the 82 registered contractors we spoke to as part of this study, 72 confirmed they had not completed any projects during this timeframe.

Those who confirmed that they had completed few or no projects through an AIC program since 2023 were asked to identify the barriers they encountered in completing additional projects. **Administrative burdens and the time commitment to participate arose as the largest barriers to completing more projects for registered contractors (Figure 12).** Respondents most commonly identified administrative tasks, such as incentive application paperwork, as a participation barrier; however, 18% pointed out that the participation process itself is a challenge due to its complexity, making it feel not worth the effort. Overall, contractors tend to struggle with the time constraints of participating in the network. As they frequently dedicate their efforts to fieldwork, they often find managing extensive paperwork and doing

other extraneous tasks outside of their normal day-to-day routine challenging. Barriers identified by diverse vendors were statistically similar to those identified by non-diverse contractors.

A minority of contractors (14%) found the Building Performance Institute (BPI) or ICC certification requirement to be a barrier to completing more projects as a Program Ally. This suggests these requirements have a fairly low impact on overall participation. Additionally, a small percentage (8%) indicated that their company does not provide the services needed to participate.

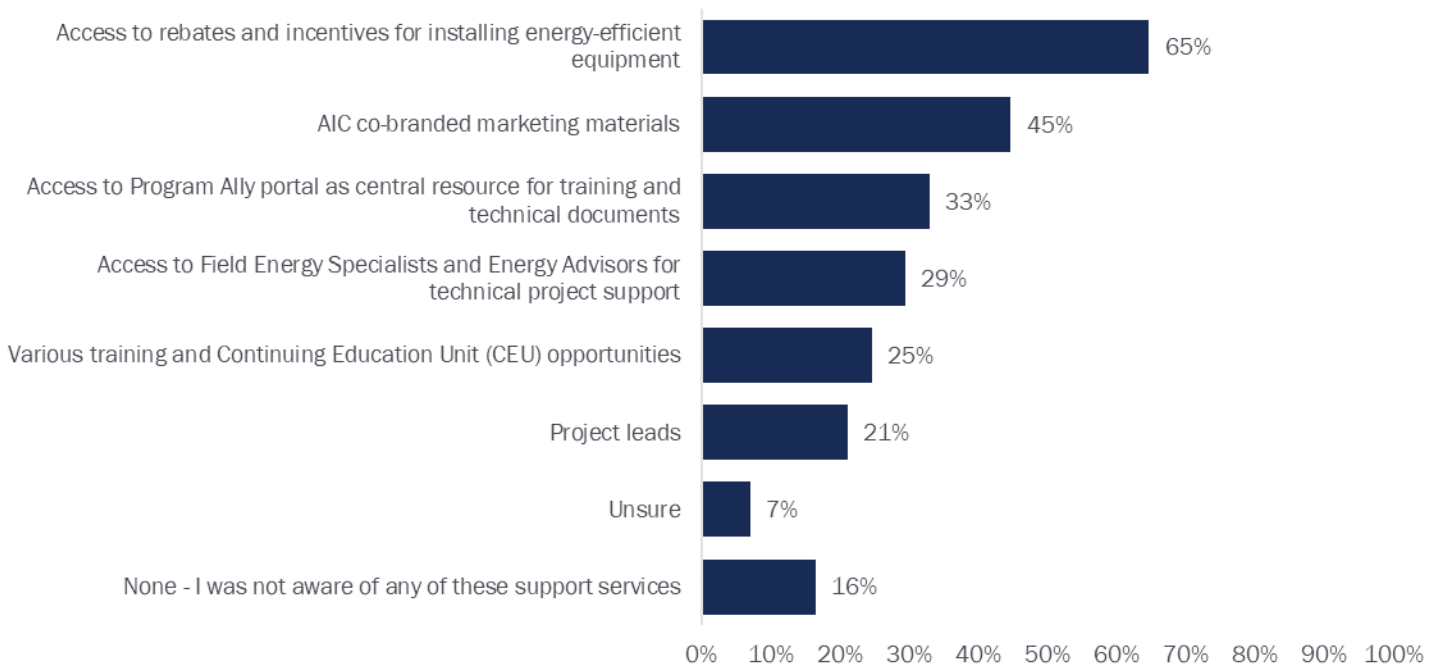
Figure 12. Barriers to Completing More Projects Through an AIC Program (n=72)



Note: Multiple responses allowed. “Another reason” responses included not having many leads in AIC territory, staff availability, or lack of marketing in AIC territory.

Registered contractors were asked to identify which Program Ally support services they were aware of prior to taking the survey. **Contractors were most familiar with the rebates and incentives they could earn for installing energy-efficient equipment, distantly followed by co-branded marketing materials.** Interestingly, contractors were least likely to be aware of project leads they could gain as a perk for participating in the network. Additional project leads could help expand contractors’ customer bases and ultimately increase their earnings—advantages that would likely entice contractors and influence their participation in the network. Notably, almost one-quarter (23%) of respondents were uncertain or unaware of any available support services, indicating a lack of effective communication regarding the support services accessible to Program Allies (Figure 13).

Figure 13. Awareness of Program Ally Support Services (n=85)



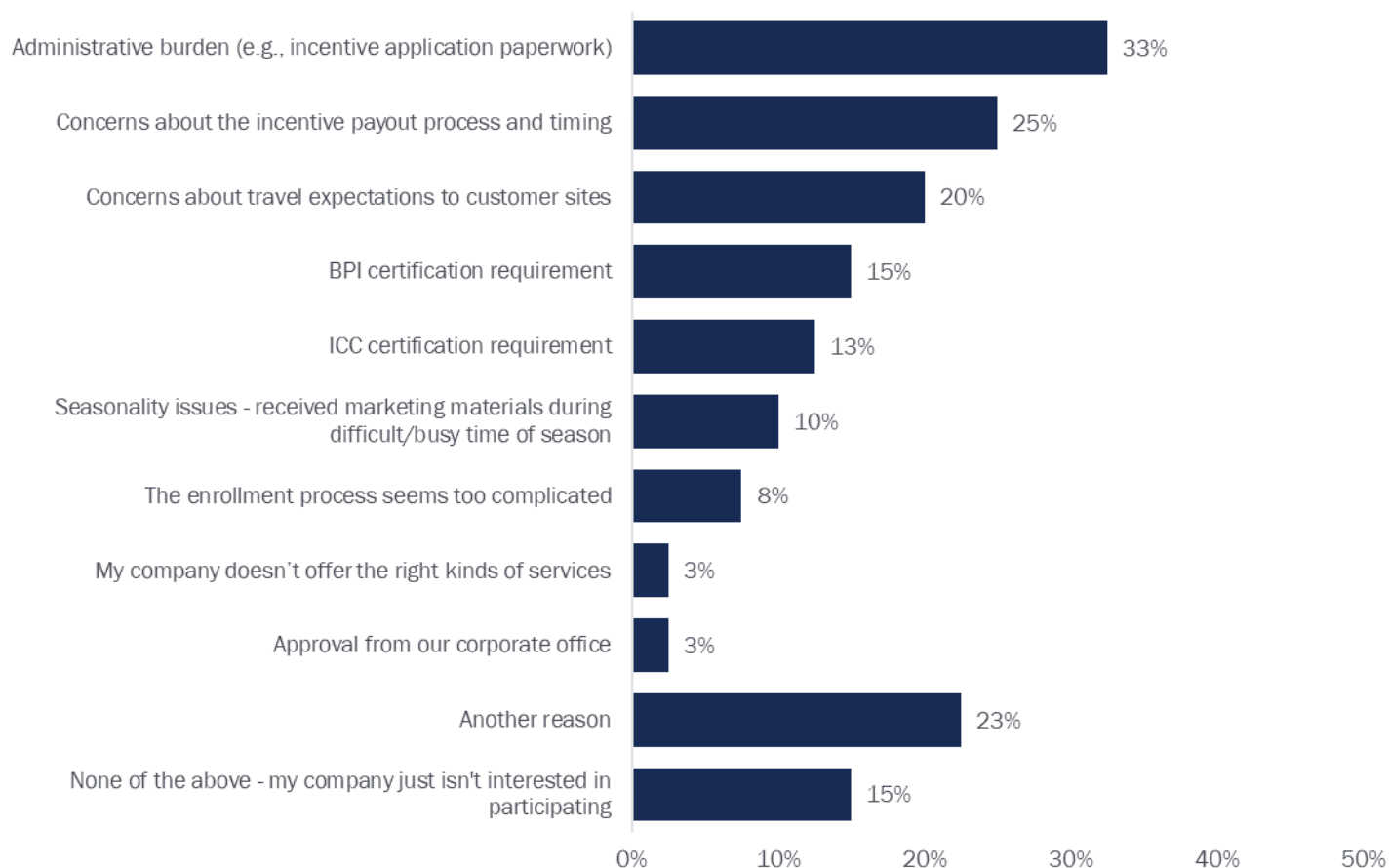
Note: Multiple responses allowed. Response options “None – I was not aware...” and “Unsure” are exclusive.

4.3.3 BARRIERS FOR UNREGISTERED CONTRACTORS

While awareness is the top barrier to enrolling in the Program Ally network for contractors, among those who were aware, the administrative burden and uncertainty about the incentive payout process arose as key barriers (Figure 14). Like registered contractors, unregistered respondents reported administrative burden as the primary barrier to enrolling and participating in the network. Although top barriers were similar between registered and unregistered contractors, those not registered were more likely to express concerns with the incentive payout process, including how long it takes to receive incentives for completed projects and certification requirements to join the network. As unregistered contractors, these respondents may be concerned because they are unfamiliar with the incentive payout process and what these certifications entail. Additionally, of the five who reported the ICC certification as a barrier, three respondents indicated this is due to uncertainty about the steps they need to take to become certified. AIC could help alleviate these enrollment barriers by better informing contractors about the network and ensuring they have realistic expectations about registration requirements and the participation process.

Other reasons contractors shared for not enrolling in the network included uncertainty about whether they are already enrolled, insufficient incentive amounts, and general mentions about participation being too time-consuming. Only 15% of contractors said their company is not interested in enrolling in the Program Ally network. Unregistered contractors who identified as diverse vendors did not display notable differences in barriers to completing more projects.

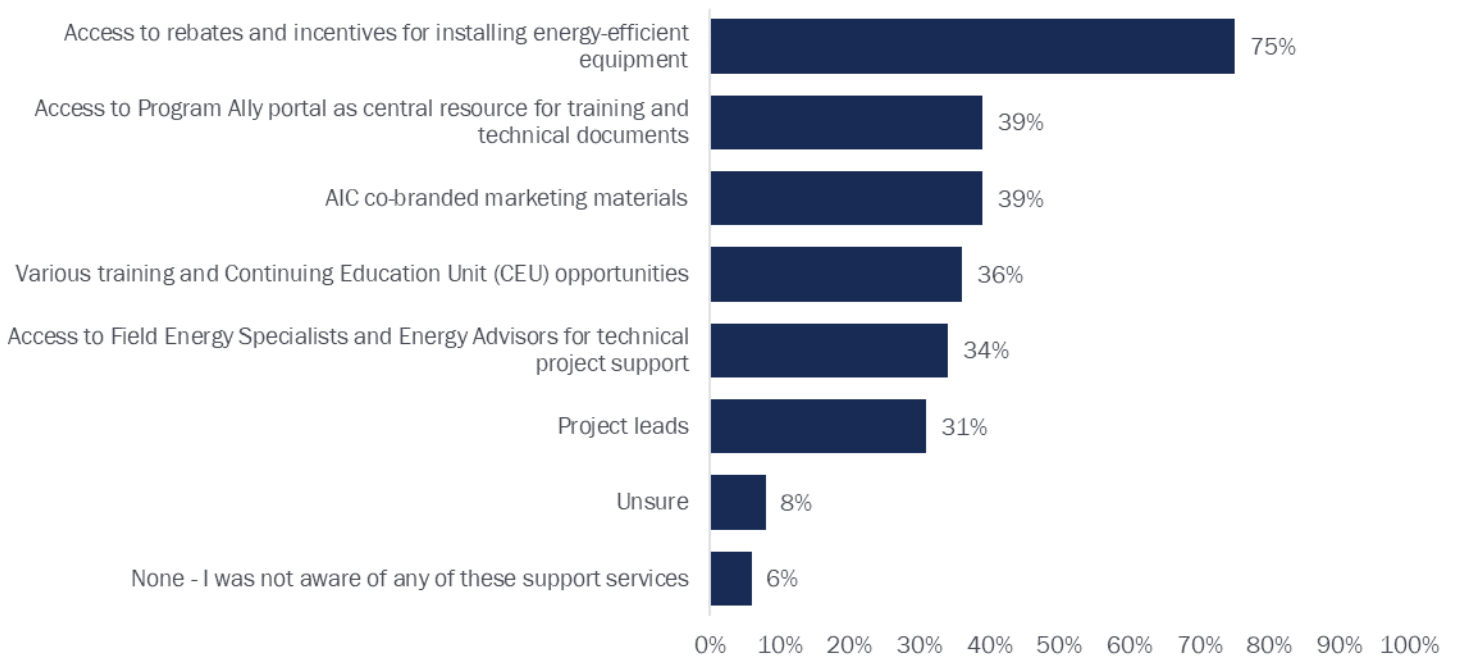
Figure 14. Barriers to Enrolling in the Program Ally Network (n=40)



Note: Multiple responses are allowed. Response option “None – my company just isn’t...” is exclusive. Only asked of unregistered contractors who were aware of the Program Ally network. Excludes 21 respondents who self-reported that they are already registered as a Program Ally (none of which were identified in the Program Ally tracking data). “Another reason” responses included incentives being too low, a perceived high investment to enroll, or because respondents mainly worked outside of AIC territory.

When asked about Program Ally network support services, unregistered contractors were predominantly familiar with the incentive and rebate offerings (Figure 15). As observed for registered contractors, project leads were the benefit with which unregistered contractors were least familiar. This finding again emphasizes AIC’s opportunity to promote this benefit better when recruiting contractors to join the Program Ally network and encouraging stronger participation in AIC programs, as it can directly impact the growth and success of contractors’ businesses. Contractors had similar awareness of other support services available to Program Allies. Only 6% said they were unaware of any of the listed services; interestingly, this was 10% less than observed for registered contractors, who we would expect to be more familiar with due to their registration status. Among unregistered contractors, diverse vendors were statistically more likely to be aware of the incentive offerings and co-branded marketing materials available to the Program Ally network.

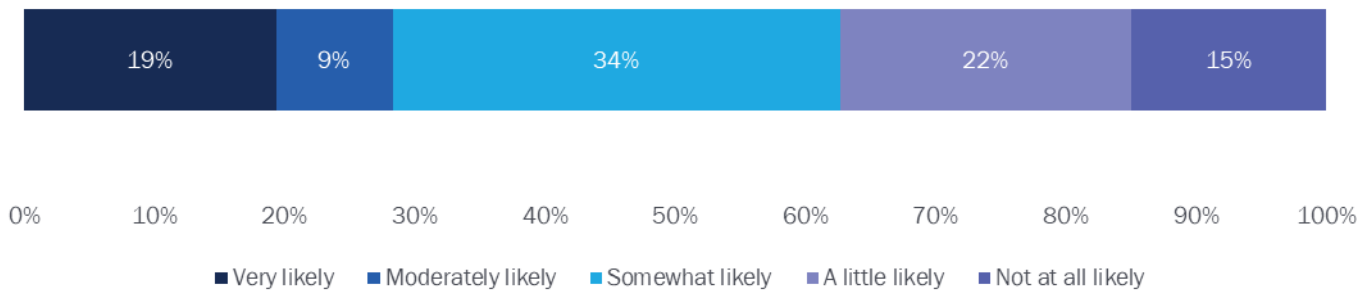
Figure 15. Awareness of Program Ally Support Services (n=64)



Note: Multiple responses allowed. Response options “None – I was not aware...” and “Unsure” are exclusive. Only asked of those who were aware of the Program Ally network.

We asked unregistered contractors who were unaware of the network prior to the survey to indicate their likelihood of enrolling in the future. **Most (62%) were at least somewhat likely to enroll in the Program Ally network moving forward, although a minority (15%) indicated they were not at all likely to do so** (Figure 16). Contractors who identified as diverse vendors were more likely to enroll in the network compared to non-diverse contractors, with a statistically larger proportion reporting they are “very likely” to enroll in the future.

Figure 16. Likelihood to Enroll in Program Ally Network (n=67)



Note: Only asked of those unaware of the Program Ally network.

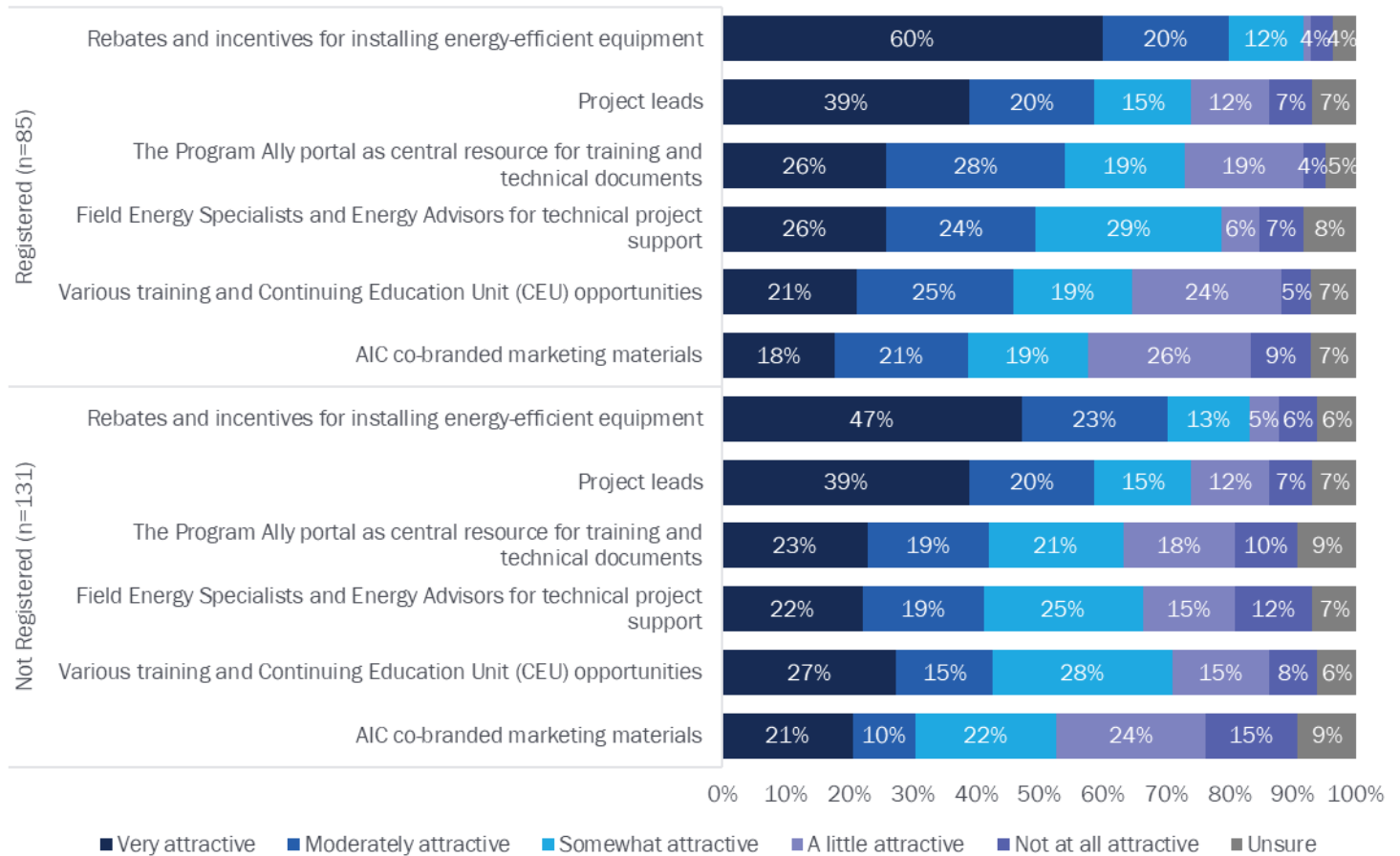
4.4 NETWORK PARTICIPATION DRIVERS

Overall, contractors find support services closely tied to financial growth to be the most attractive (Figure 17). When asked about the appeal of various network support services, most registered and unregistered contractors reported the

incentive offerings and project leads to be at least moderately attractive to them and their businesses. This finding further supports AIC’s opportunity to highlight project leads as a perk for participating in the Program Ally network, as contractors have limited awareness of this benefit yet consider it highly desirable. Contractors found co-branded marketing materials to be the least attractive network benefit.

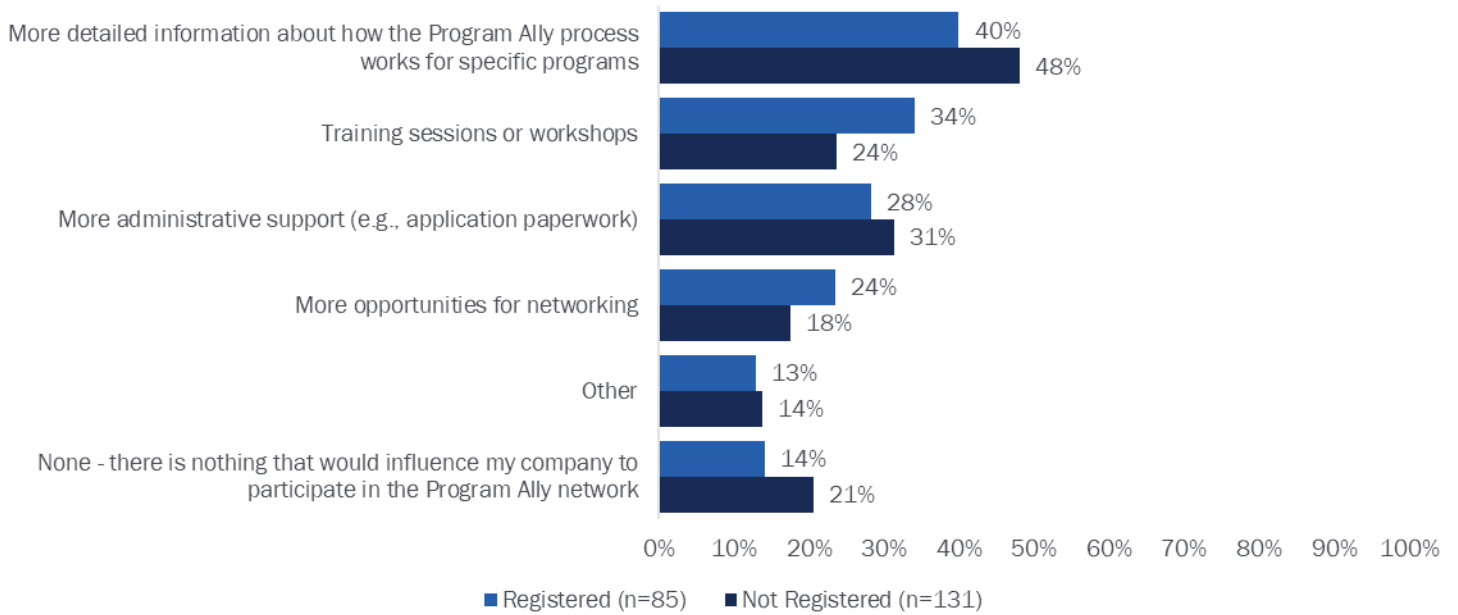
Although most contractors overall did not find co-branded marketing materials, access to Field Energy Specialists and Advisors, and the Program Ally portal highly attractive, diverse vendors were statistically more likely to rate all three of these support services as “very attractive” compared to non-diverse contractors.

Figure 17. Attractiveness of Support Services



Contractors emphasized the need for clearer processes, more training, and additional administrative support to encourage stronger network participation (Figure 18). Both registered, and unregistered contractors mentioned that receiving more detailed information about the Program Ally participation process and how it works across different programs would motivate their company to participate in the network. Registered contractors were more likely to find training sessions or workshops influential, while administrative support was more desirable among unregistered contractors. Diverse vendor contractors were statistically more likely than non-diverse contractors to report that training sessions and additional networking opportunities would encourage them to participate in the Program Ally network. Overall, 18% of contractors (12 registered; 27 unregistered) said there is nothing that could influence their company to participate in the network.

Figure 18. Other Resources/Support AIC Could Offer to Encourage Network Participation



Note: Multiple responses allowed. Response option “None” is exclusive. “Other” responses included a need for more leads, higher incentives, an easier application process, and ending or modifying the need for BPI certification.

5. CONCLUSIONS AND RECOMMENDATIONS

AIC's Program Ally network has historically experienced a shortage of qualified contractors in several technical areas, such as experience with weatherization and HPWHs, as well as coverage in less populated regions of the territory. AIC commissioned this study to identify ways to strategically expand the Program Ally network to address these gaps and ultimately serve more customers.

This research revealed that awareness of the network is by far the largest barrier to expanding the network. Then, once contractors are aware and enrolled, AIC must still make a compelling case that there are tangible financial benefits for their businesses for completing projects through AIC's Energy Efficiency Programs. Contractors must feel confident that these benefits supersede the additional administrative burden, additional time, and potential risk they would incur by participating, especially when asked to travel to less populated areas. AIC has created a Program Ally network that seems well-positioned to encourage contractors to participate, as many of the network's support services and benefits we explored in the survey are sufficiently attractive to contractors. However, the contractors in this survey were often unaware of them. As such, we identified several opportunities to adjust marketing and outreach tactics to contractor drive awareness and interest in actively participating in the network.

This study also demonstrated that several of the priority services AIC seeks to expand in its network (residential plumbing, weatherization, HPWHs, health and safety measures) are generally lacking in the broader market. This highlights the importance of workforce training and AIC's potential role in it, which could be a compelling motivator for contractors to join the network or become more engaged with it. Commercial HVAC and refrigeration were also priority services for expansion. This study found a significant contingent of registered Program Allies that offer these services but are not participating. While more training may still be helpful, this finding suggests that AIC should focus more on re-engaging directly with these contractors to get them more interested in completing AIC projects.

We also specifically examined whether there were key differences in survey responses among diverse contractors or those serving Southern Illinois. More than half of respondents self-identified as diverse, although we found few notable differences in responses between diverse and non-diverse vendors across the topics we explored. This suggests that the same awareness and business case barriers are present for most contractors regardless of background. However, it is well established in the industry that diverse people and businesses may need more support to be ready to participate in utility programs, and AIC's Market Development Initiative (e.g., the Diverse Program Ally Incubator) was designed, in part, to address those barriers.¹³ Further, while we were able to identify specific barriers to serving low-population regions in general, there were too few respondents who specifically served Southern Illinois to confidently draw distinct conclusions about the region.

Below, we present our key findings and recommendations for AIC to help expand their Program Ally network.

- **Finding 1:** Most unregistered contractors were unaware of the Program Ally network prior to taking the survey. This indicates that AIC recruitment efforts are not reaching a significant segment of contractors who serve its territory, thus missing opportunities to strengthen the network and its service coverage. Overall, social media was the least common source of network awareness and was also found to be the least influential factor in contractors' decision to enroll.
- **Recommendation:** Explore data sources that house information for contractors serving the AIC territory (e.g., ICC Energy Efficiency Installer database) to further build out AIC's Program Ally recruitment lists for email and phone outreach. Look into data sources for contractors located in neighboring states to ensure those who commonly travel into Illinois to serve AIC customers are aware of the network and its benefits.

¹³ <https://amerenillinoissavings.com/incubator/>

- **Recommendation:** Review the time and effort AIC staff invests in social media marketing and determine whether it is worthwhile given its limited impact on contractor awareness.
- **Finding 2:** Contractors find support services closely linked to financial growth, such as incentive offerings and project leads, most attractive. Although highly valuable, project leads were the network benefit contractors were least familiar with, suggesting this support service is not properly emphasized in AIC Program Ally network marketing materials. Co-branded marketing materials were the least attractive perk to registered and unregistered contractors. Nearly one-quarter of respondents registered in the network (23%) were uncertain or unaware of any available support services, indicating a lack of effective communication overall regarding the benefits accessible to Program Allies.
 - **Recommendation:** Emphasize support services uniquely available to Program Allies in network marketing and outreach materials and highlight benefits supporting business growth, such as project leads. Additional project leads could help expand contractors' customer bases and ultimately increase their earnings—advantages that would likely influence their participation in the network. Work with AIC's marketing department to develop language emphasizing the potential financial benefit of participating in the Program Ally network. If made aware of this desirable perk, some contractors may also be more willing to endure challenging aspects of participating, such as burdensome incentive paperwork.
 - **Recommendation:** Review the amount of time AIC staff spend developing co-branded marketing materials and assess whether this level of effort makes sense considering the lack of interest expressed by contractors. Examine both the time it takes to develop approved co-branding templates as well as coordinate with Program Allies using the materials (e.g., technical support, review).
- **Finding 3:** The administrative burden was the top barrier preventing contractors from participating (among registered contractors) and enrolling (among unregistered contractors) in the Program Ally network. Registered contractors also expressed concerns about the time commitment associated with participating, while unregistered respondents indicated uncertainty about registration requirements and participation expectations. When asked about additional support services that could encourage network participation, contractors emphasized the need for clearer processes, more training, and additional administrative support.
 - **Recommendation:** Explore ways to simplify network participation for contractors to reduce the administrative burden and overall time commitment. Required administrative tasks are a particularly difficult barrier for smaller firms that are less likely to have designated administrative staff. Investigate ways to streamline steps in the participation process, such as the project handoff, incentive application, or rebate payout, to make the overall experience less time-intensive. Mitigating these issues would not only address the primary barriers preventing contractors from enrolling and participating in the network, but it could also positively affect contractors' word-of-mouth communication about the network and thus further influence network participation.
 - **Recommendation:** Provide more detailed information about the registration requirements and participation process in network marketing and outreach materials, particularly when recruiting new contractors for the Program Ally network. AIC can help alleviate primary enrollment barriers by better informing contractors about the network and ensuring they have realistic expectations, such as the travel required to reach customer sites.
- **Finding 4:** Contractors primarily served the Central Illinois region but were willing to travel further for more lucrative jobs. Contractors are typically more willing to travel longer distances for jobs with a higher earning potential; we found that 12% were willing to travel more than 50 miles for a small-priced job and 68% were willing to travel at least this far for a large-priced job or multiple smaller jobs. Travel requirements were the top barrier to serving customers in less populous, more rural areas of AIC territory, followed by difficulty with sales outreach to customers in these areas.

- **Recommendation:** Explore how financially feasible it would be to offer travel stipends to Program Allies for projects in certain areas of the service territory to offset travel costs. Alternatively, consider offering Program Allies enhanced incentives for project sites in specific hard-to-reach areas to make the longer travel more financially worthwhile.
- **Recommendation:** Consider ways to generate larger project opportunities for Program Allies in rural, harder-to-reach areas. Avoid smaller, one-off projects, like a single advanced thermostat installation for the Smart Savers channel, that require contractors to travel more than 25 miles to the customer site.
- **Recommendation:** Provide additional marketing and outreach support for contractors in less populated regions. This could include partnering with local CBOs that are better positioned to find and communicate directly with customers and likely have a more trusted reputation in the community. AIC and CBO marketing efforts could help lay the groundwork for program awareness and generate project leads for Program Allies in hard-to-reach areas, thus streamlining the process of serving these customers.
- **Finding 5:** Most registered contractors who served the commercial sector provided HVAC services, while just over one-fifth (23%) had experience with commercial refrigeration services. Both of these are priority areas for network expansion.
 - **Recommendation:** Leverage existing relationships with registered contractors to promote stronger participation in the Business Program Ally network for HVAC and refrigeration projects. Attempt to streamline the initial participation of these contractors by reaching out to them with project opportunities that are ready to hand off to them to highlight how easy the process can be. Marketing and outreach materials should also emphasize influential network benefits, such as access to incentives and project leads.
- **Finding 6:** Residential plumbing is another priority service area for expansion. Among those who served the residential sector, registered contractors were more likely to provide plumbing services. Despite this, unregistered contractors had considerably more experience working with HPWHs, including systems for single family homes and larger, centralized systems typically used in high-rise multifamily buildings.¹⁴
 - **Recommendation:** Conduct network outreach to registered and unregistered contractors identified in the survey as having relevant HPWH experience. AIC should also consider offering additional training opportunities for installing HPWHs, particularly larger systems fit for commercial and industrial customers, or monetary support toward HPWH training registration or certification fees. By offsetting this cost, AIC can help contractors advance their knowledge in this area and provide them with relevant projects to demonstrate their new skills. Marketing and outreach materials should emphasize influential network benefits, such as access to incentives and project leads.
 - **Recommendation:** Consider offering a “sign-on” bonus for new contractors who enroll in the Program Ally network who have an up-to-date HPWH certification to encourage participation among contractors who already have this skill set.
- **Finding 7:** The remaining priority services for network expansion are weatherization and health and safety remediation. Weatherization services seem generally lacking in the market, although unregistered contractors across both sectors more commonly held the requisite skill set. On the residential side, unregistered contractors had stronger health and safety remediation skill sets than registered respondents.
 - **Recommendation:** Provide registered contractors with weatherization and health and safety remediation training opportunities to strengthen these skill sets in the network. AIC should also target unregistered contractors who offer weatherization and/or health and safety remediation services with network recruitment

¹⁴ In some cases, contractors complete AIC energy efficiency projects without being a registered Program Ally. It is possible that unregistered contractors who reportedly had experience installing HPWH equipment have installed this type of equipment through an AIC Initiative, such as the Retail Products or Midstream Initiatives, and could continue to do so without enrolling in the Program Ally network.

efforts, particularly those who indicated they were likely to join the network in the future. If made available to the network, these training opportunities should be highlighted in recruiting materials as they could further incentivize unregistered contractors who typically provide these services to enroll to gain access and expand their knowledge base.

- **Recommendation:** Consider offering a “sign-on” bonus for new contractors who enroll in the Program Ally network who have an up-to-date BPI Building Analyst certification. This certification is a prerequisite to completing projects for AIC’s Income Qualified Initiative, as it equips contractors with the knowledge and skills needed to provide weatherization services.

APPENDIX A. PRIORITY COUNTIES

Table 6. Priority Counties in AIC Service Territory

County Name	Population	Low Population	Southern
Hardin County	3,569	✓	✓
Pope County	3,707	✓	✓
Calhoun County	4,317	✓	
Gallatin County	4,670	✓	✓
Alexander County	4,695	✓	✓
Scott County	4,710	✓	
Pulaski County	4,911	✓	✓
Stark County	5,218	✓	
Putnam County	5,561	✓	
Edwards County	5,968	✓	✓
Henderson County	6,088	✓	
Brown County	6,294	✓	
Schuyler County	6,733	✓	
Hamilton County	7,911	✓	✓
Jasper County	9,144	✓	
Cumberland County	10,261	✓	
Wabash County	10,942	✓	✓
Greene County	11,543	✓	
Marshall County	11,683	✓	
Menard County	11,954	✓	
Mason County	12,523	✓	
Cass County	12,596	✓	
Clay County	12,999	✓	
Ford County	13,250	✓	
Johnson County	13,326	✓	✓
White County	13,401	✓	✓
Washington County	13,536	✓	
Massac County	13,661	✓	✓
Moultrie County	14,342	✓	
Pike County	14,342	✓	
Lawrence County	14,813	✓	
Clark County	15,088	✓	
De Witt County	15,365	✓	
Mercer County	15,487	✓	
Richland County	15,488	✓	

County Name	Population	Low Population	Southern
Wayne County	15,761	✓	✓
Warren County	16,185	✓	
Edgar County	16,334	✓	
Bond County	16,450	✓	
Union County	16,667	✓	✓
Piatt County	16,714	✓	
Hancock County	17,186	✓	
Crawford County	18,300	✓	
Douglas County	19,629	✓	
Perry County	20,503		✓
Saline County	22,873		✓
Randolph County	29,873		✓
Jefferson County	36,320		✓
Franklin County	37,138		✓
Jackson County	52,141		✓
Williamson County	66,706		✓



Opinion **Dynamics**

CONTACT:

Alan Elliott
Director
aelliott@opiniondynamics.com

Allyson Dillehay
Managing Consultant
adillehay@opiniondynamics.com



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