

QUICK TAKES: BEHAVIOR AND DATA

Moderators: Tim Guiterman, EnergySavvy and Michael Li, U.S. Dept. of Energy

PAPERS (*in order of appearance*):

Exploring Deep Savings: A Toolkit for Assessing Behavior-Based Energy Interventions

Beth Karlin, University of California, Irvine

Rebecca Ford, University of Otago

Cynthia McPherson Frantz, Oberlin College

Timing, Longevity, Depth: Investigating Customer Engagement in Residential Behavior Programs

Shannon Kahl, Illume Advising, LLC

Eileen Hannigan, Illume Advising, LLC

Jan Cook, Accelerated Innovations

Moving the Needle: Measuring the Performance of an Energy Program Promotional Campaign

Paul Schwarz, Research Into Action Inc.

Mersiha McLaren, Research Into Action Inc.

Benjamin L. Messer, Research Into Action Inc.

Humphrey Tse, Independent Electricity System Operator, Toronto, ON

Phil Bosco, Independent Electricity System Operator, Toronto, ON

Engaging Hard to Reach Program Participants: A Data-Based Comparison Across Recruitment Techniques

Josh Levig, ADM Associates

Taylor Moseley, ADM Associates

Barbara Seliutina, ADM Associates

Hank Will, ADM Associates

SESSION SUMMARY:

This session provides fresh insights into the tools to assess behavioral interventions, using data to better understand what drives customer engagement, measuring the performance of program marketing activities, and recruitment techniques for hard-to-reach customers.

This panel begins by diving deep into the field of assessing effectiveness of behavior-based programs. As utilities and regulatory agencies focus more attention on behavior-based energy interventions, it becomes critical to ensure that evaluations of such programs are rigorous and accurate. While the metric used to measure *whether* these various programs work (kWh) is fairly standard and easy to compare between studies, the metrics used to measure *how* and *for whom* they work have been left to individual researchers and evaluators. Standardization of assessment methods is common in related fields such as education and psychology, but has yet to take hold in energy program evaluation. Our first panelist argues for a more systematic and comprehensive approach to the evaluation of behavior-based energy interventions, and describes a preliminary toolkit that is currently being developed and validated.

Our second panelist acknowledges the dramatic rise in both the volume of behavior-based programs as well as the diversity of program offerings, and seeks to explore how customer engagement in program features varies by customer or how it impacts energy savings. Drawing on longitudinal data from over four years of energy use and participation in an opt-in behavioral program, this speaker explores savings by varying levels of engagement and energy usage. Specifically, they will report findings from an

in-depth examination of customer engagement in the program in three key areas: timing, longevity, and depth.

The third panelist tackles one of the key issues facing all DSM programs, which is how to encourage customers to opt-in and participate. Specifically, this speaker shares the lessons from an effort to measure the performance of marketing and outreach activities aimed at increasing participation in three consumer programs. The panelist will explain how they estimated the incremental program participation or “lift”. Specifically, they will discuss 1) how to assess the performance of promotional campaigns using a quasi-experimental lift study; 2) key assumptions to consider when designing a lift study; and 3) challenges associated with rapidly assessing the effects of a promotion.

Last but not least, our final panelist compares the effectiveness of various recruitment methods for programs with hard to reach customers. The speaker will present the findings from a study in which four methods were used to recruit customers for in-home monitoring to determine LED hours of use, and will provide a data-based comparison of the recruitment rates across each method. Based upon the findings, the panelist will discuss barriers, procedures, results, and suggestions for future evaluations that may benefit from each of the assessed recruitment strategies.