

# Nonparticipant Market Barriers Study (RI-21-RX-NPStudy)

## EXECUTIVE SUMMARY

For over 30 years, National Grid has helped customers in Rhode Island save energy and lower utility bills and has generated non-energy environmental, health, and other benefits for customers and society through a portfolio of energy efficiency programs. In fact, between 2016 and 2020, National Grid served almost 95,000 electric and 30,000 natural gas customers through its residential programs.

### Why Study Nonparticipation?

While these programs have successfully reached many customers, National Grid would like to provide equitable access to its energy efficiency programs to all customers. To better understand how to reach more difficult to serve customers' segments, particularly those that have not historically participated in energy efficiency programs, National Grid sponsored this study to characterize the customer segments that have historically participated less in National Grid's Rhode Island residential programs, assess barriers to their participation, and identify opportunities to engage them.

### Key Findings

#### Barriers to Participating

- **Awareness** – Nearly 40% of survey respondents did not know that National Grid offers energy efficiency programs.
- **Lack of Understanding** – Many customers did not understand who the programs are for, why National Grid offers them, how to participate, or what benefits to expect.
- **Insufficient Trust** – While customers trust National Grid as a source of information, they may not trust that the programs and associated benefits are legitimate.
- **Competing Priorities** – Customers have different living situations, home conditions, and other priorities that prevent them from prioritizing energy efficiency.
- **Program Requirements** – Actual or perceived program requirements can prevent customers from participating.
- **Language, communication, culture, and experience** – These all affect someone's ability to participate.
- **Being a renter or landlord** – In general, being a renter or landlord is a deterrent to participating.

#### Ways to Overcome Barriers

- **Include information on how National Grid programs are funded by customers** in program materials to help explain why National Grid has energy saving programs and how they benefit from customers saving energy.
- **Use testimonials to illustrate** who programs are for and how they work. Testimonials could also help to make energy savings more tangible.
- **Educate community organizations that serve key groups of interest** on National Grid's energy efficiency offerings. They can, in turn, recommend them to their clients to address high bills, comfort, or other issues their clients are experiencing that can be addressed through energy efficiency improvements.
- **Diversify language, content, and channel of messaging** to ensure messaging is accessible, culturally relevant, and available on the channels that community members are using.
- **Tie program services to everyday needs and value** to customers.
- **Continue to promote financial savings** associated with making improvements.



# Executive Summary

For over 30 years, Rhode Island Energy (RIE, formerly National Grid) has helped customers in Rhode Island save energy and lower utility bills and has generated non-energy environmental, health, and other benefits for customers and society through a portfolio of energy efficiency programs. In fact, between 2016 and 2020, RIE served almost 95,000 electric and 30,000 natural gas customers through its residential programs.

## Why Study Nonparticipation?

While these programs have successfully reached many customers, RIE would like to provide equitable access to its energy efficiency programs to all customers. To better understand how to reach more difficult to serve customers' segments, particularly those that have not historically participated in energy efficiency programs, RIE sponsored this study to characterize the customer segments that have historically participated less in RIE's Rhode Island residential programs, assess barriers to their participation, and identify opportunities to engage them.

## Key Findings

### Barriers to Participating

- **Awareness** – Nearly 40% of survey respondents did not know that RIE offers energy efficiency programs.
- **Lack of Understanding** – Many customers did not understand who the programs are for, why RIE offers them, how to participate, or what benefits to expect.
- **Insufficient Trust** – While customers trust RIE as a source of information, they may not trust that the programs and associated benefits are legitimate.
- **Competing Priorities** – Customers have different living situations, home conditions, and other priorities that prevent them from prioritizing energy efficiency.
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**1,462** Surveys with customers

**24** Interviews with customers

**18** Interviews with community organizations

**11** Interviews/surveys of landlords and property managers

**8** Interviews with RIE implementation and marketing teams