BTM
BEYOND THE METER

DEFG
Customer Insights & Advisory Firm
An E Source Company

Beyond the Meter Consumer Survey

July 28, 2022

What is Beyond The Meter (BTM)?

ELECTRICAL WORLD
NOVEMBER 11, 1922

Meter Readers, Truckmen and Linemen Sell Washers

According to telegraphic advices from Portland, Ore., the Pacific Power & Light Company, with operating headquarters in Portland, conducted a most successful washing-machine sales campaign during October. The company serves about 24,000 residential customers in seventeen smaller communities in Oregon and Washington and, although electrical devices are already well distributed in the community, 355 more washers were sold during the month in this campaign. The best previous month's record on the Pacific company's system was in October last year, when 236 washing machines were sold.

What is Beyond The Meter (BTM)?

Beyond The Meter:

A range of value-added services and products offered through the local utility that increases customer satisfaction and new sources of non-usage revenue for the utility.

Overview of "Beyond The Meter" Working Group

This new working group of the UCRC will bring together utilities and vendors for a full scope of work in 2022.

- ❑ Business case development
- ❑ Program design
- ❑ Performance metrics & benchmarking
- ❑ Voice-of-the-customer surveys and research
- ❑ Case studies of innovation and market success
- ❑ Regulatory considerations
- ❑ Utility-Vendor partnership models
- ❑ Marketing / Messaging Strategies

BTM Working Group Utility Members:

Ameren
American Electric Power
citizens energy group
Austin Energy
Avista
bge — An Exelon Company
comed — An Exelon Company
DTE
DLC — Duquesne Light Co.
Eversource
FirstEnergy
Liberty
LA DWP — Los Angeles Department of Water & Power
MLGW
NiSource
peco — An Exelon Company
PG&E
pepco — An Exelon Company
PSEG
PSEG Long Island
Seattle City Light
SMUD
SRP
TECO — Tampa Electric — An Emera Company
we energies
Xcel Energy

BTM Working Group Vendor Members:

BTM
BEYOND THE METER

ALARM.COM

AMERICAN WATER RESOURCES

AIG

bidgely

COX

enervee

FORTEGRA

greenmarbles
Smarter Connections

HOME·X

QUESTLINE

Overview of BTM Customer Survey

- The BTM Customer Survey includes findings from two surveys.
- The first customer survey was conducted in Q4 2022 as part of the State of the Customer Survey. The slides with those findings are marked with a box in the upper left corner.
- The second survey was conducted in Q2 2022. The second customer survey explored in more detail customer preferences and the role of the utility in the BTM market.

The Narrative of the BTM Survey

- Customer demand for BTM products and services is strong and growing. Limits on the BTM market arise more from supply and infrastructure issues. There is the potential for doubling or tripling this market in 5 years driven by customer demand.
- A significant number of respondents do not fully trust BTM vendors and service providers. There are important distinctions between the industry view and customers on BTM. Industries sell widgets, e.g., solar arrays and batteries, while customers are looking for extensions to their homes and lifestyles. The focus on climate change is peripheral for both.
- Utilities have an important role to play in the BTM market. And customers WANT and EXPECT their utility to support them as a trusted energy advisor.

The Narrative of the BTM Survey (Continued)

- Customers want recommendations from their utilities on BTM products and services. This is especially true for products or services that are directly related to energy, e.g., solar.
- Approximately 50 percent of respondents were “extremely likely” or “very likely” to use a BTM technician or service recommended/ endorsed by their local utility.
- Two-thirds of respondents are interested in paying for BTM products and services on their utility bill.
- Utilities and vendors could work together to increase the visibility and awareness of utility marketplaces as well as what is being offered to customers through the marketplaces.
- The more customers are invested in the BTM market, the more concerned they are about customer service and reliability.

Survey Methodology and Notation

Research Methodology

The Russell Omnibus was conducted via the internet among 1,065 adults 18 years of age or older from June 3-6, 2022. Figures for gender, age, and geography were weighted where necessary to match their actual proportions in the population. The bases shown in this report are the unweighted bases.

An invitation to participate in the study was sent by e-mail to panel members who have agreed to be contacted by Russell Research and interviewed over the Internet.

- Participating respondents were interviewed online at a secure Russell Research URL programmed for this study.
- Sample was provided to Russell Research from a leading sample provider.

All research was carried out in compliance with all relevant legal and ethical requirements within the market and in compliance with ISO 20252:2019.

Statistical Analysis

The statistical significance of a result in this survey is the probability that the observed relationship (e.g., between variables) or a difference (e.g., between means) in a sample occurred by pure chance, and that in the population from which the sample was drawn, no such relationship or differences exist.

Using less technical terms, one could say that the statistical significance of a result tells us something about the degree to which the result is “true.” More technically, the value of the p-value represents a decreasing index of the reliability of a result. The higher the p-value, the less we can believe that the observed relation between variables in the sample is a reliable indicator of the relation between the respective variables in the population.

Specifically, the p-value represents the probability of error that is involved in accepting our observed result as valid, that is, as “representative of the population.” For example, a p-value of 0.05 (i.e., 1/20) indicates that there is a 5% probability that the relation between the variables found in our sample is a “fluke.“

The following statistical notation is used throughout the report:

☐ = Indicates figure is significantly higher than the other/indicated sub-group at a 95% confidence level

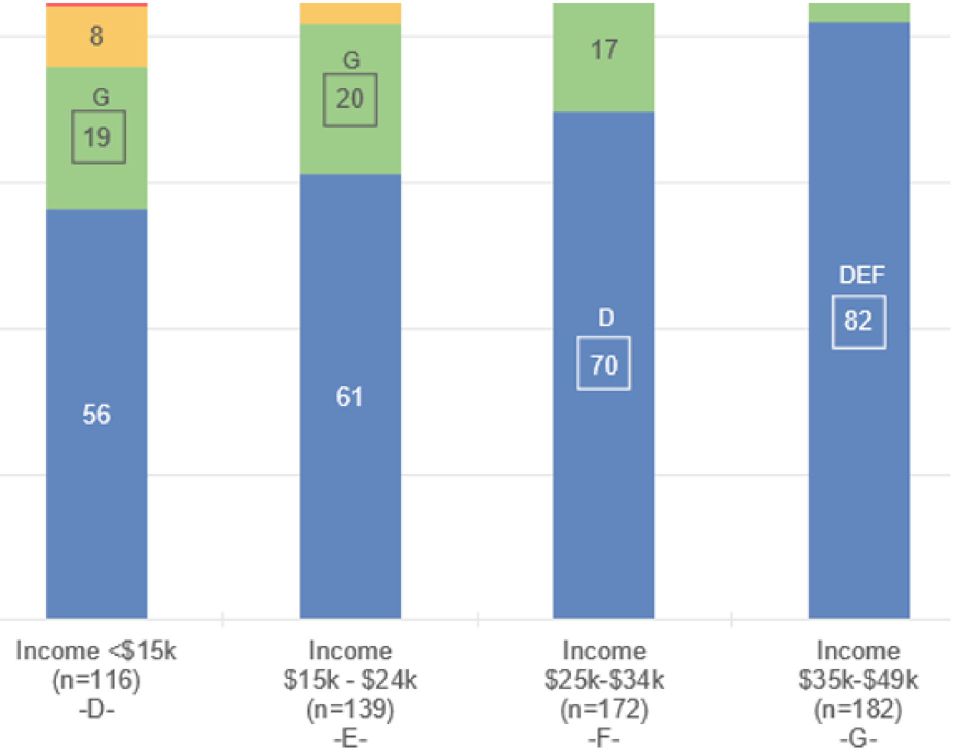
In theory, with probability samples of this size, one could say with 95 percent certainty that the results have a statistical precision of plus or minus 3.0 percentage points of what they would be if the entire adult population had been polled with complete accuracy. Unfortunately, there are several other possible sources of error in all polls or surveys that are probably more serious than theoretical calculations of sampling error. They include refusals to be interviewed (non-response), question wording and question order, and weighting. It is impossible to quantify the errors that may result from these factors. This online survey is not a probability sample.

Statistical Significance

When is a difference between two numbers "statistically significant"?

☐ = This symbol marks figures that are significantly higher than a related data point at the 95% confidence level.* The letter(s) above the box refer to the column(s) containing the data that are lower by a "statistically significant" amount. For example:

- The number "61" (61 percent) in the blue column "E" (without a box) is larger than "56" in column "D." However, that difference (5 percentage points) is not statistically significant. It falls within the range of statistical precision (plus or minus some percentage points).
- In contrast, we can state with 95% confidence that the number "82" in in column "G" is significantly higher than each of the numbers (56, 61, and 70) in the columns marked "D," "E," and "F."



"95% confidence level" means that a claim is expected to be false just once in twenty times

* Depending on the number of respondents, confidence levels may be calculated at the 95% level, the 90% level, or at some other level.

A Note About Racial and Ethnic Terminology

DEFG has asked Russell Research to display racial and ethnic categories. Russell Research uses the words "Caucasian," "African American," and "Hispanic" like the U.S. Census. The wording of Russell's survey questions appears below. ***What words would people prefer?*** In a Gallup poll,* people of different backgrounds were asked what they prefer to be called. ***Opinions varied, but there is no one answer.*** We display the words used by Russell Research.

Black Americans' Preferred Term for Their Racial Subgroup

The terms "Black" and "African American" are both used to refer to this racial subgroup of Americans. Which term do you think should generally be used -- Black, African American, another term, or does it not matter to you either way?

	June 1-July 5, 2021
	%
Black	17
African American	17
Does not matter	58
Another term/Other	6
No opinion	2

GALLUP, JUN 1-JUL 5, 2021

Hispanic Americans' Preferred Term for Their Ethnic Subgroup

The terms "Hispanic," "Latino," and "Latinx" are used to refer to this ethnic subgroup of Americans. Which term do you think should generally be used -- Hispanic, Latino, LatinX, another term, or does it not matter to you either way?

	June 1-July 5, 2021
	%
Hispanic	23
Latino	15
Latinx	4
Does not matter	57
Another term/Other	1
No opinion	0

GALLUP, JUN 1-JUL 5, 2021

Russell Research Questions

Q. Are you of Hispanic origin or descent? (CHECK ONE)

- _ Yes
- _ No
- _ Rather not answer

Q. Do you consider yourself … (CHECK ONE)

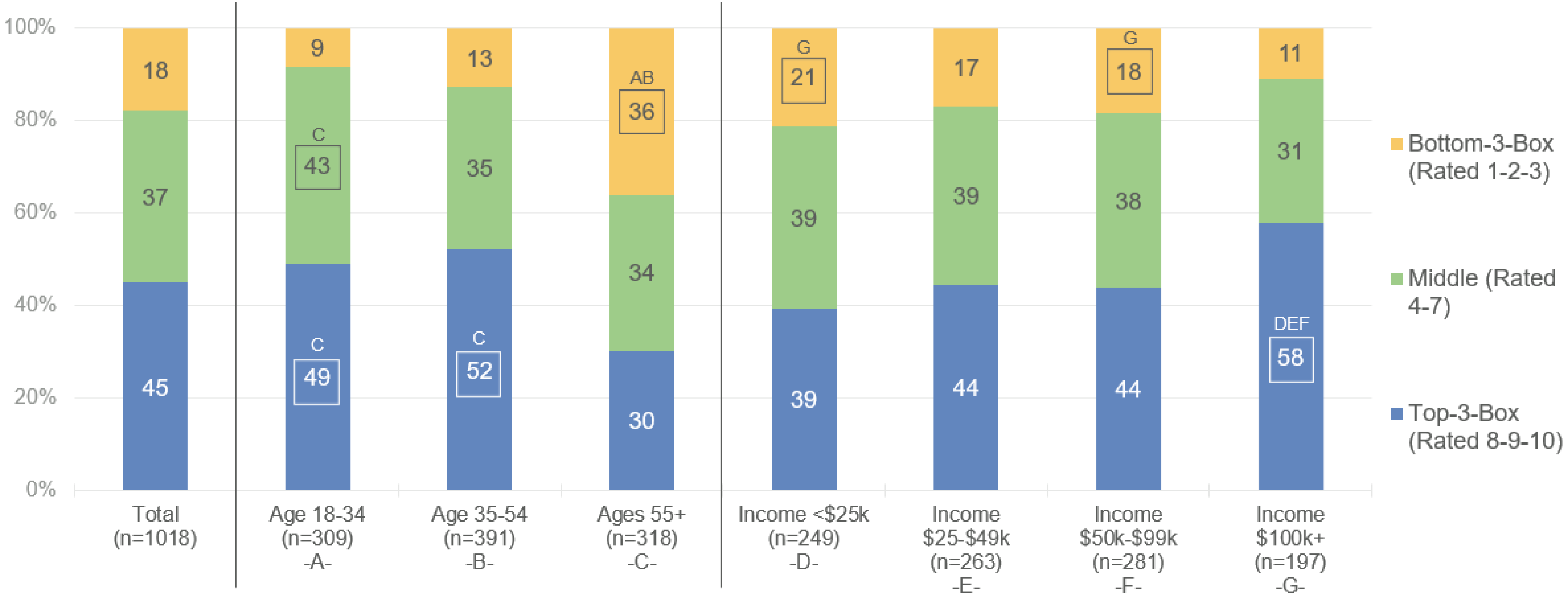
- _ African-American
- _ Asian/Pacific Islander
- _ Caucasian
- _ Native American
- _ Mixed ethnic background
- _ Other (Specify)
- _ Rather not answer

* Source: https://news.gallup.com/poll/353000/no-preferred-racial-term-among-black-hispanic-adults.aspx

Interest in Energy-Related Home Products/Services

Q4 2021

Interest Level In Owning or Leasing Solar Power In Next Two Years

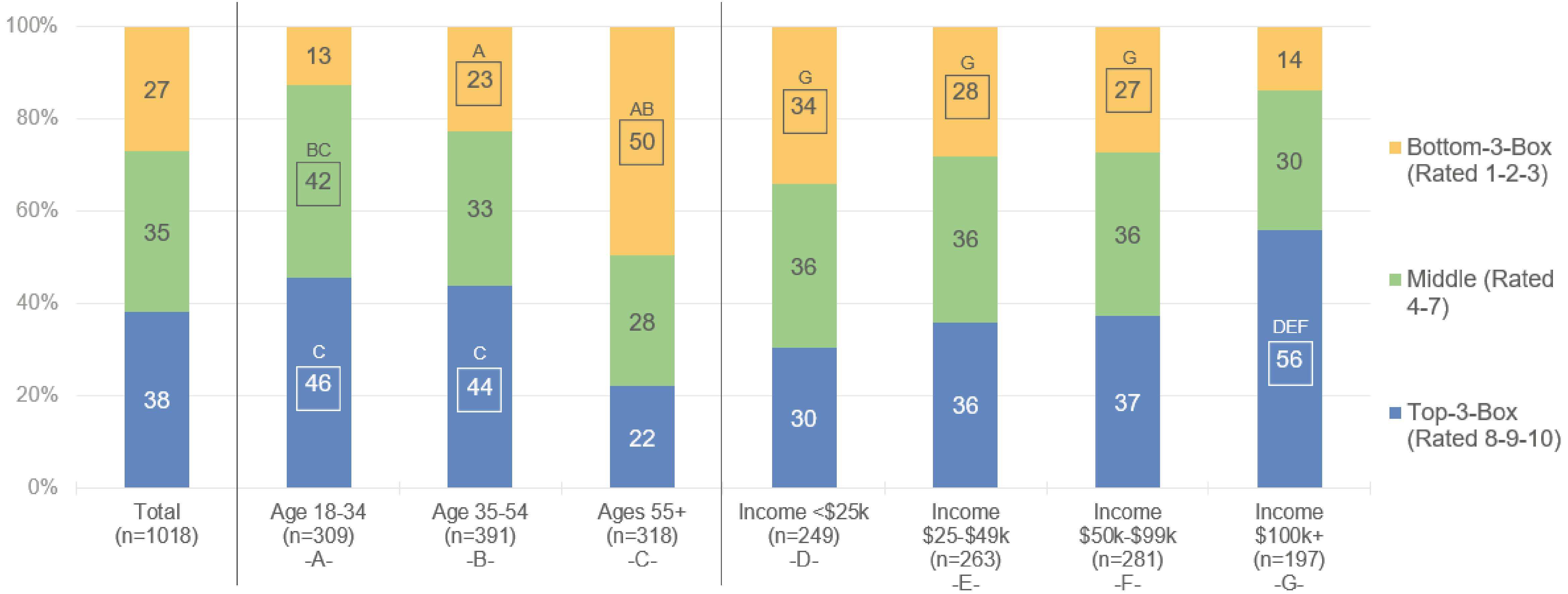


Base: Total Respondents. Q.B19. Putting aside cost, how would you rate your interest in owning or leasing solar power over the next 2 years?

Russell RESEARCH

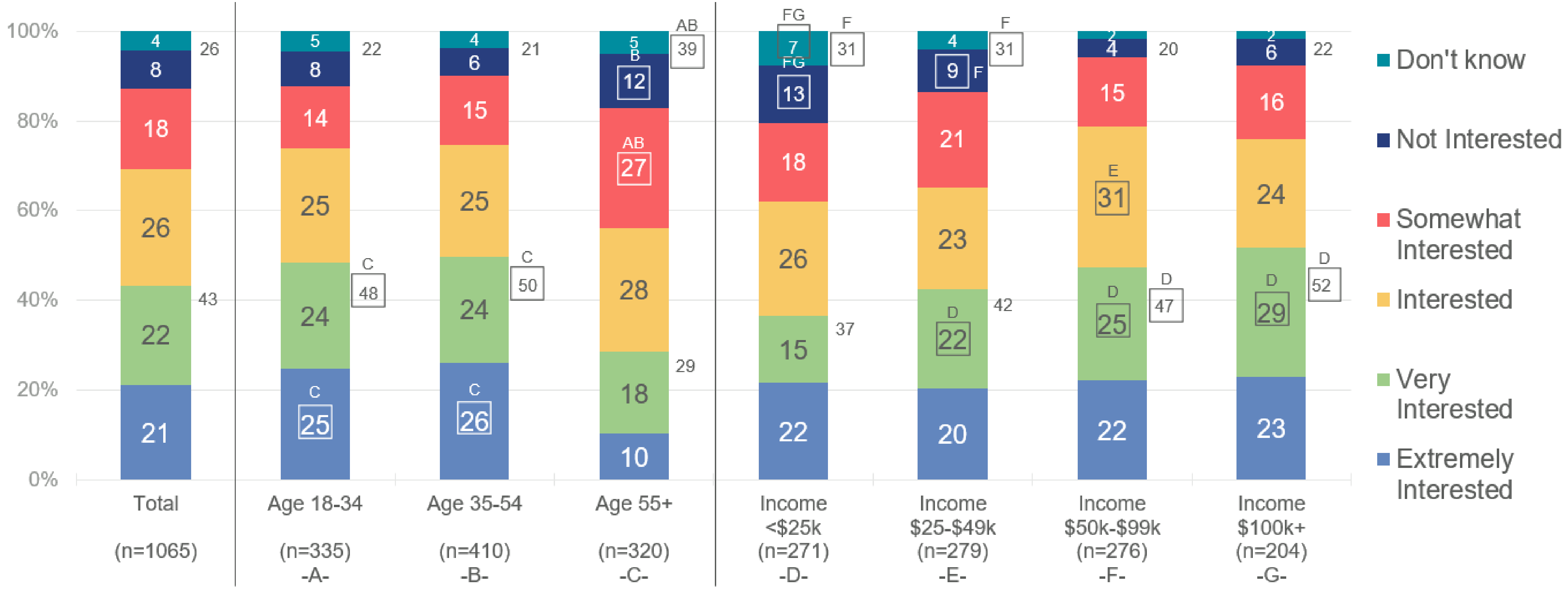
Q4 2021

Interest In Purchasing Electric Vehicle In Next Two Years



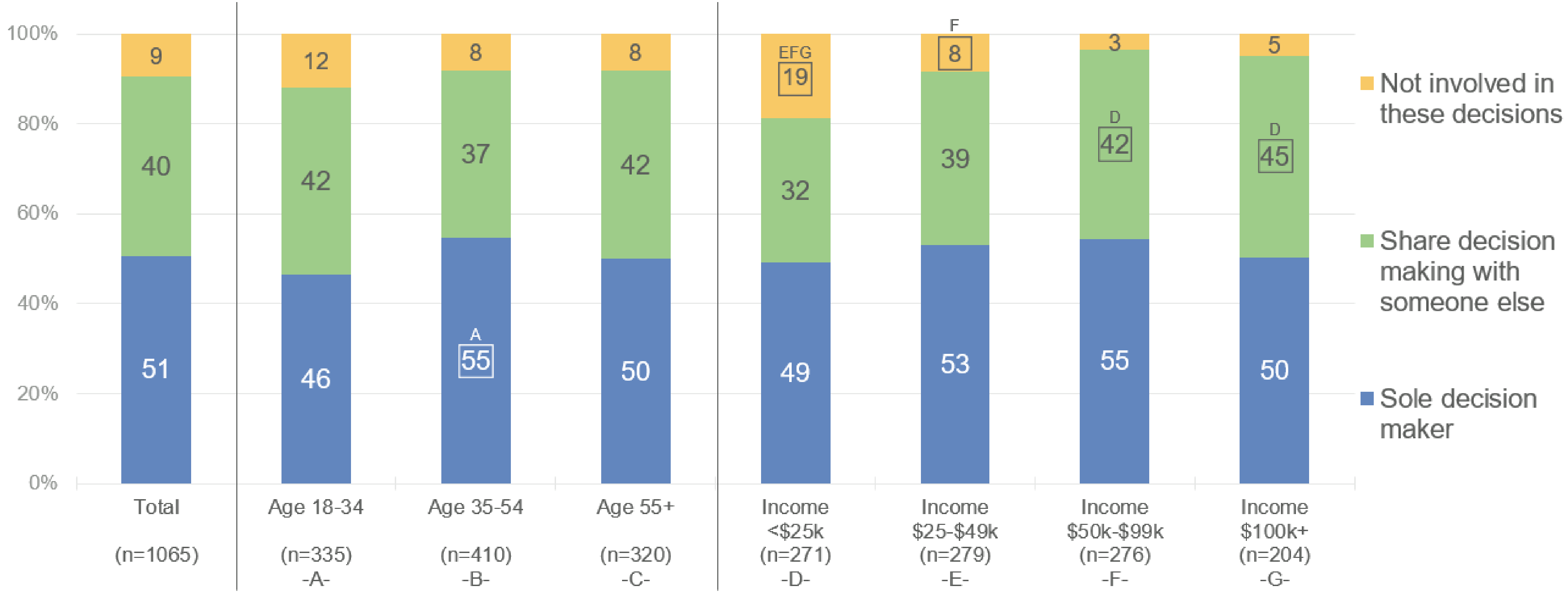
Base: Total Respondents. Q.B21. Putting aside cost, how would you rate your interest in purchasing an electric vehicle over the next two years?

Interest in Energy-Related Home Products and Services is Higher Among Adults Younger Than 55 Years



Base: Total Respondents. M1. How would you rate your general interest in energy-related home products and services, anything from smart thermostats, renewable energy, new lighting, home warranty products, electric vehicles and accessories, etc.?

One Half of Consumers Have Sole Responsibility for Decisions About Energy-Related Home Products and Services



Base: Total Respondents. M12. What is your level of responsibility for the energy-related home products and service decisions for your household?

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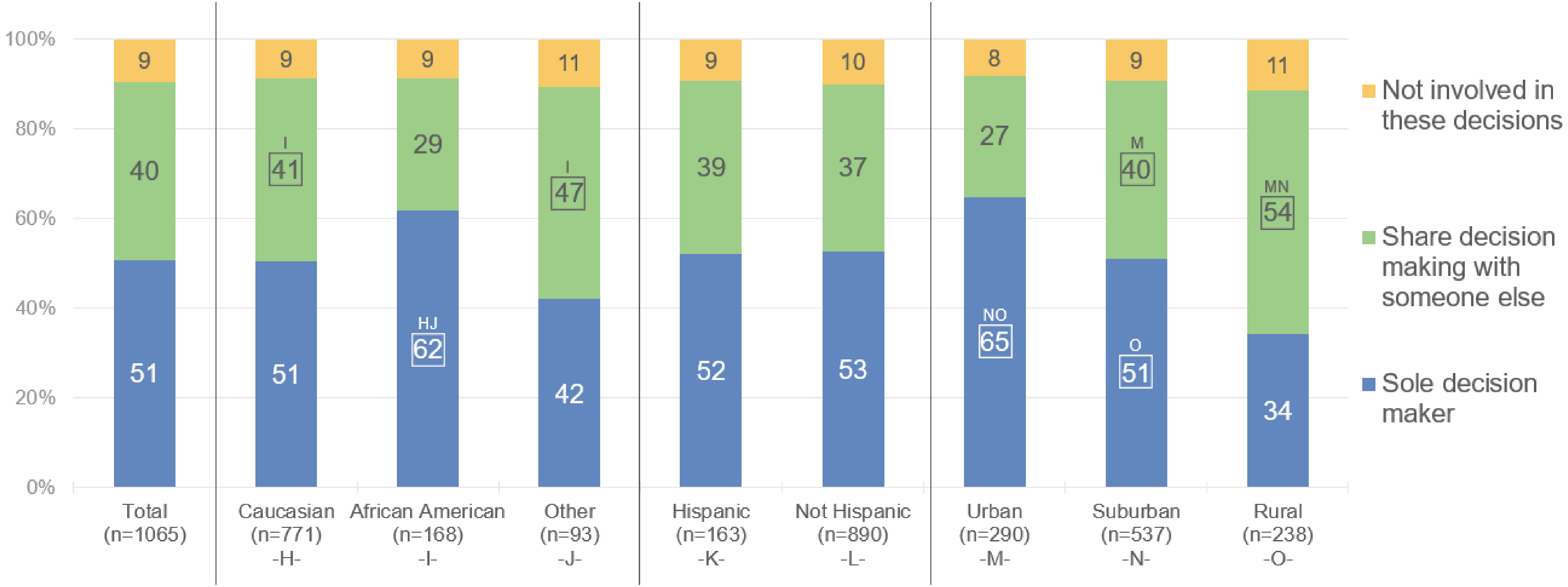
Responsibility for Decisions About Energy-Related Home Products and Services is Higher in African American and Urban Households (continued)



Base: Total Respondents. M12. What is your level of responsibility for the energy-related home products and service decisions for your household?

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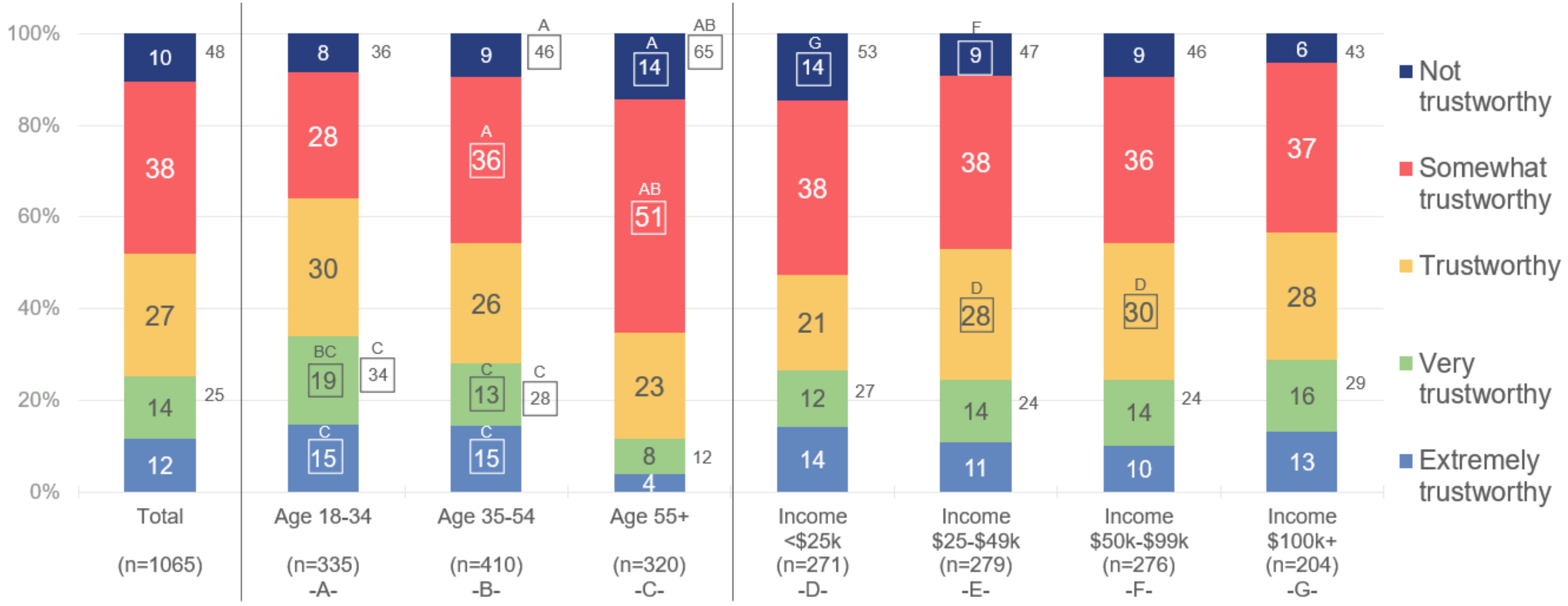
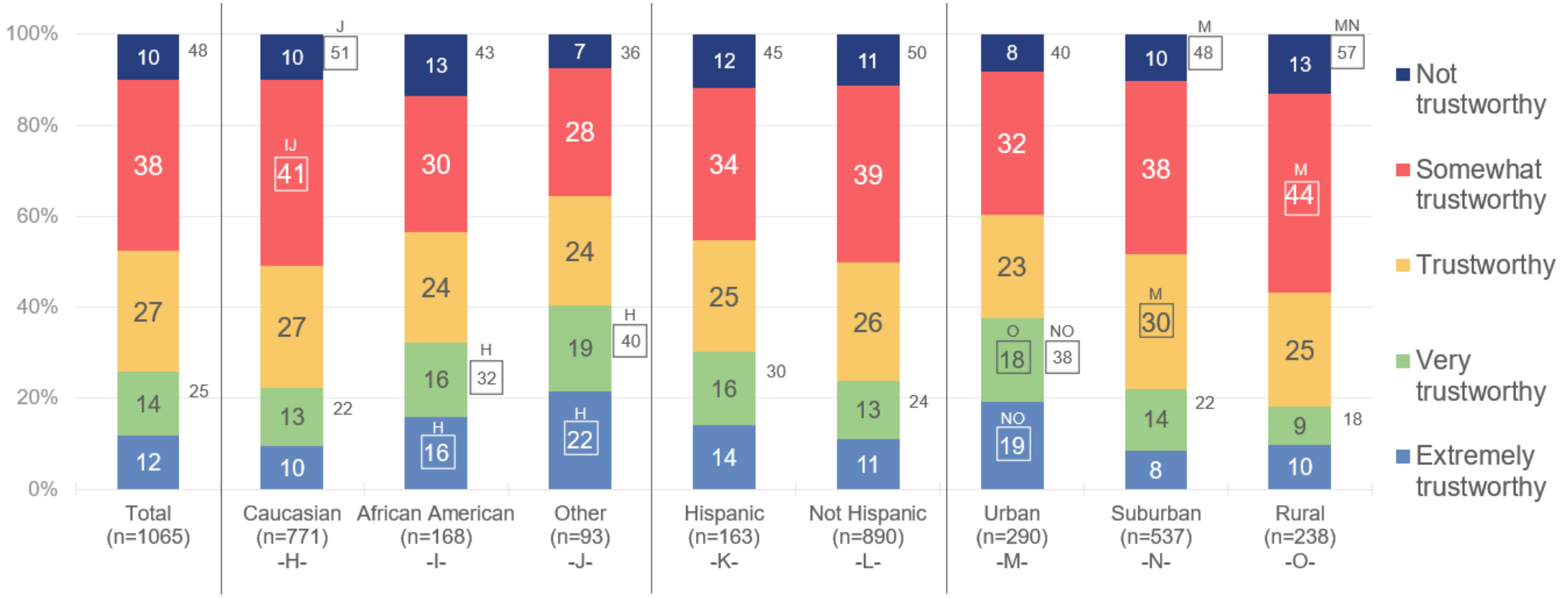
Trust of What They Hear from Companies That Sell Energy-Related Products and Services

Trust of Companies That Sell Energy-Related Products and Services is Higher Among Adults Younger Than 55 Years



Base: Total Respondents. M2. How much do you trust what you hear from companies trying to sell energy-related home products and services to you?

Trust of Companies That Sell Energy-Related Products and Services is Higher in Urban Areas and Among Non-Caucasians (continued)

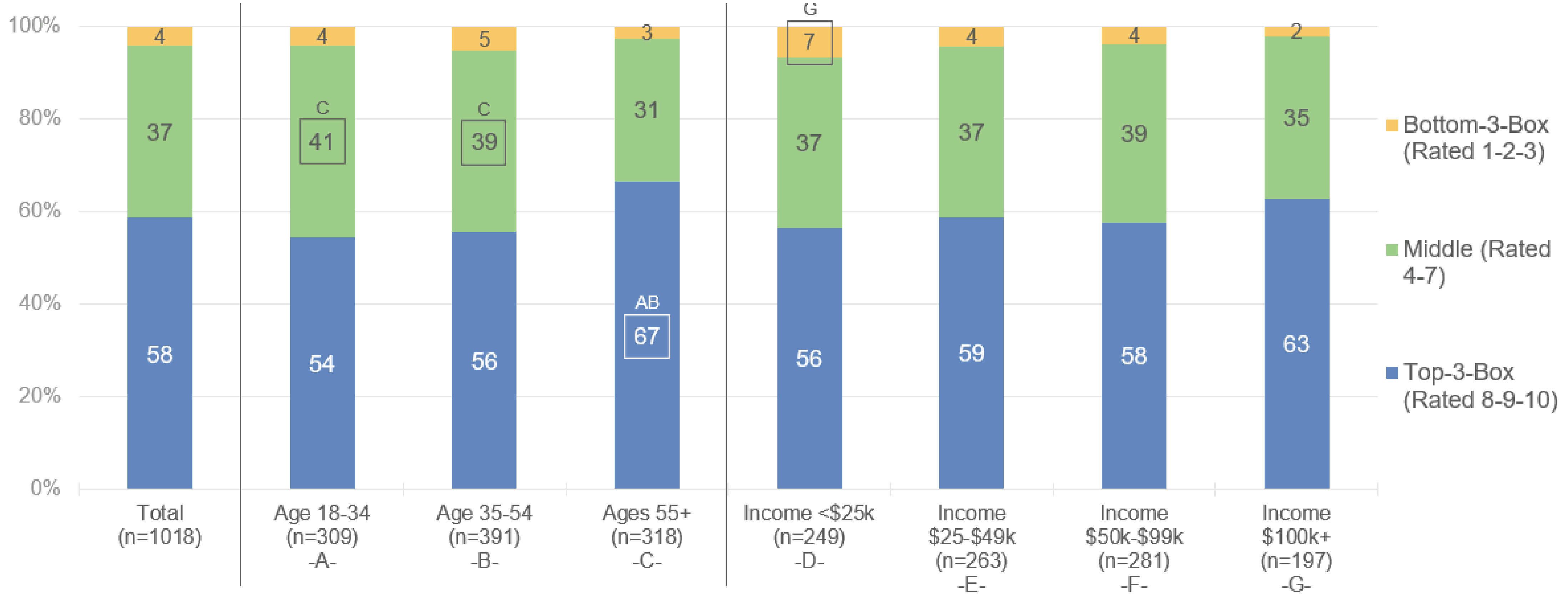


Base: Total Respondents. M2. How much do you trust what you hear from companies trying to sell energy-related home products and services to you?

Trust Increases When Information is Received from the Local Utility

Q4 2021

High Satisfaction with Local Electric Utility



(Rating of Past Year Electric Utility Customer Service) Base: Total Respondents. Q.B1. Overall, how would you rate the customer service you have received from your local electric utility in the past year?

Q4 2021

Positive Customer Sentiments to Describe Electric Utility Service

Base: Total Respondents (n=1018). Q.B2. What one word would you use to describe the customer service that you receive from your local electric utility?

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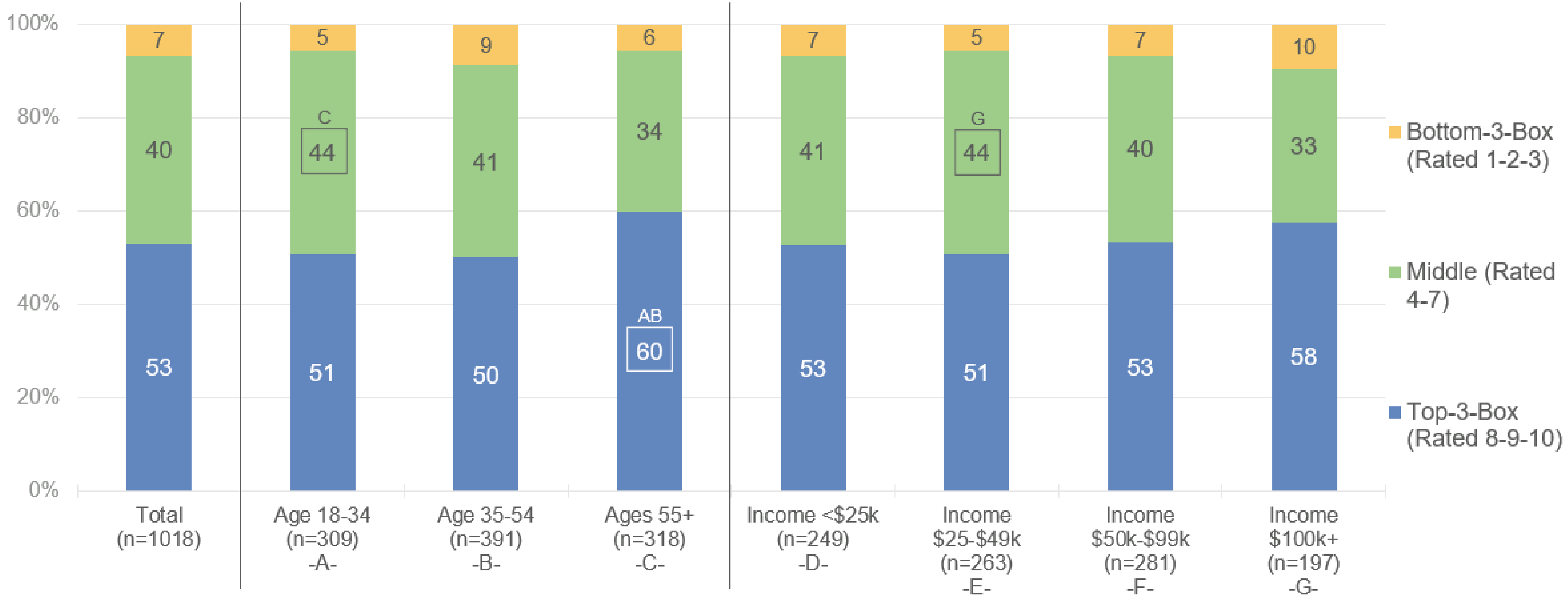
Q4 2021

Majority of Customers View Electric Utility as a Trusted Energy Advisor



Base: Total Respondents. Q.B3. How would you rate your electric utility as a trusted energy advisor?

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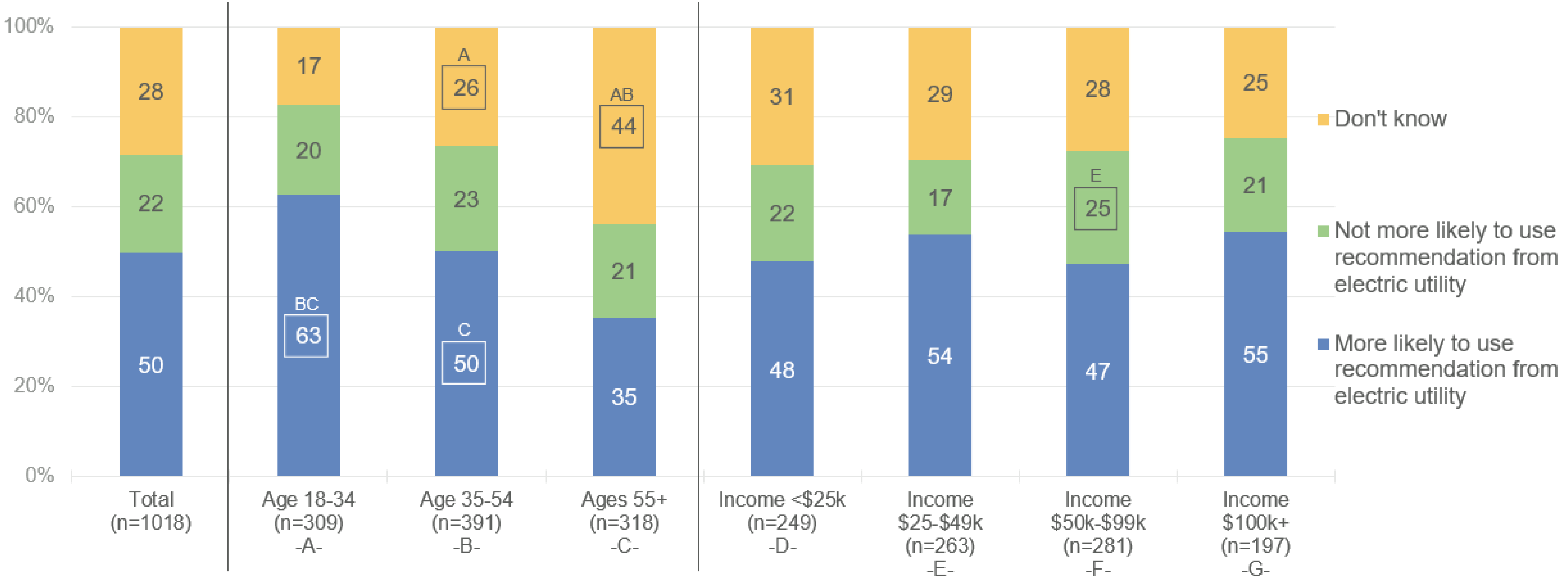
Q4 2021

Utilities Have Influence Over Customer Choices Relating to Home Services



(Use of Utility Service Recommended Home Service/Repair) Base: Total Respondents. Q.B4b. If you needed home services or repairs, would you be more likely to use a service that was recommended by your electric utility?

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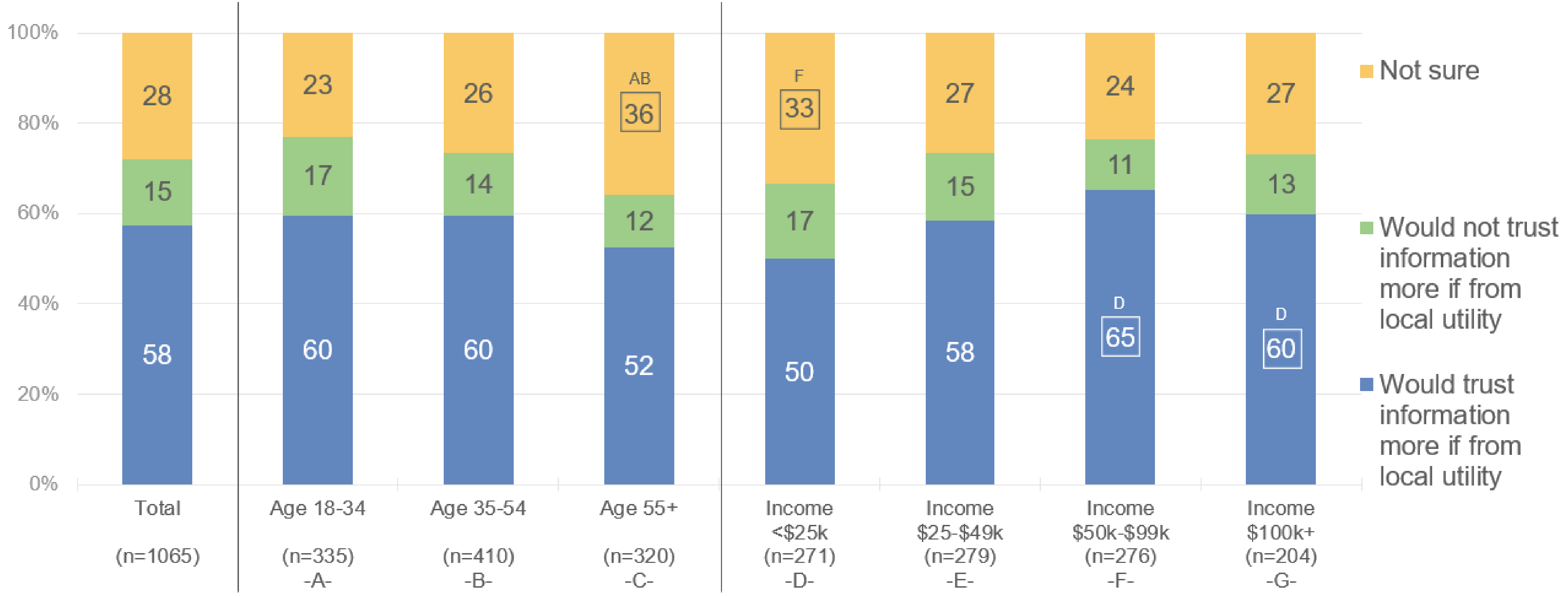
Trust Increases When Information is Received from the Local Utility

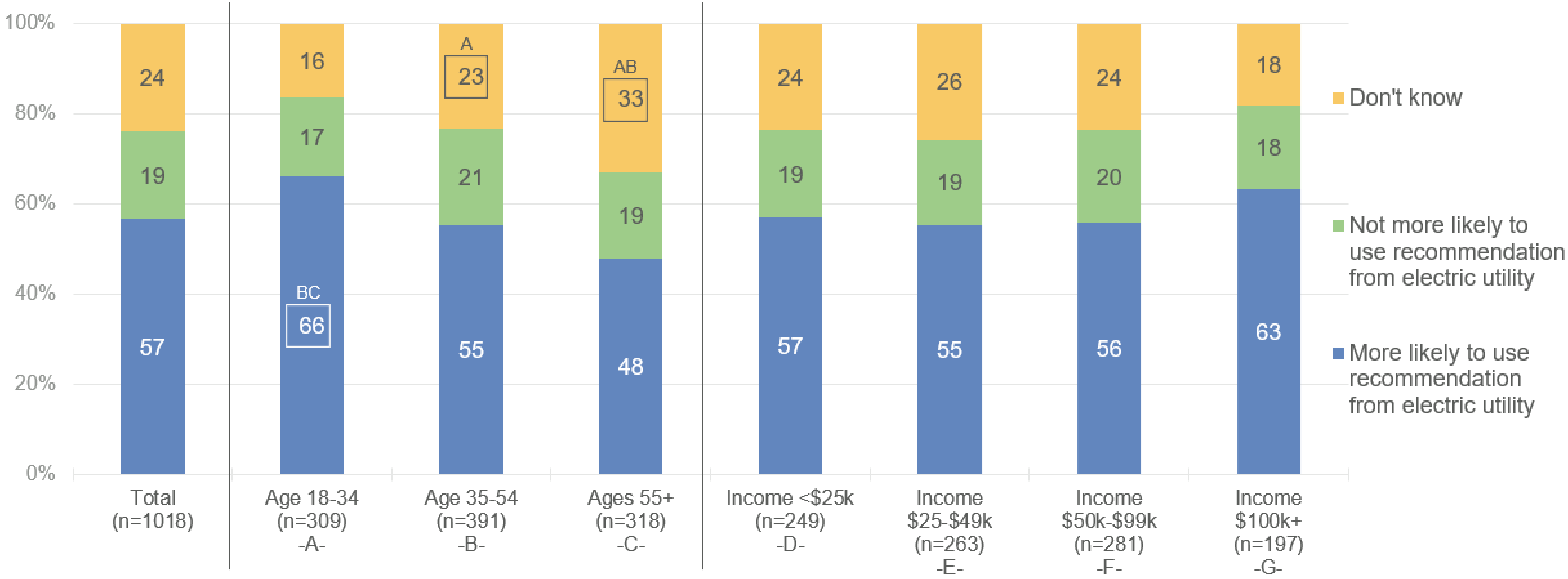


Base: Total Respondents. M3. Would you trust the information on energy-related home products and services more if you received it from your local utility?

Likelihood of Using a Service or a Technician Recommended and Endorsed by the Local Utility

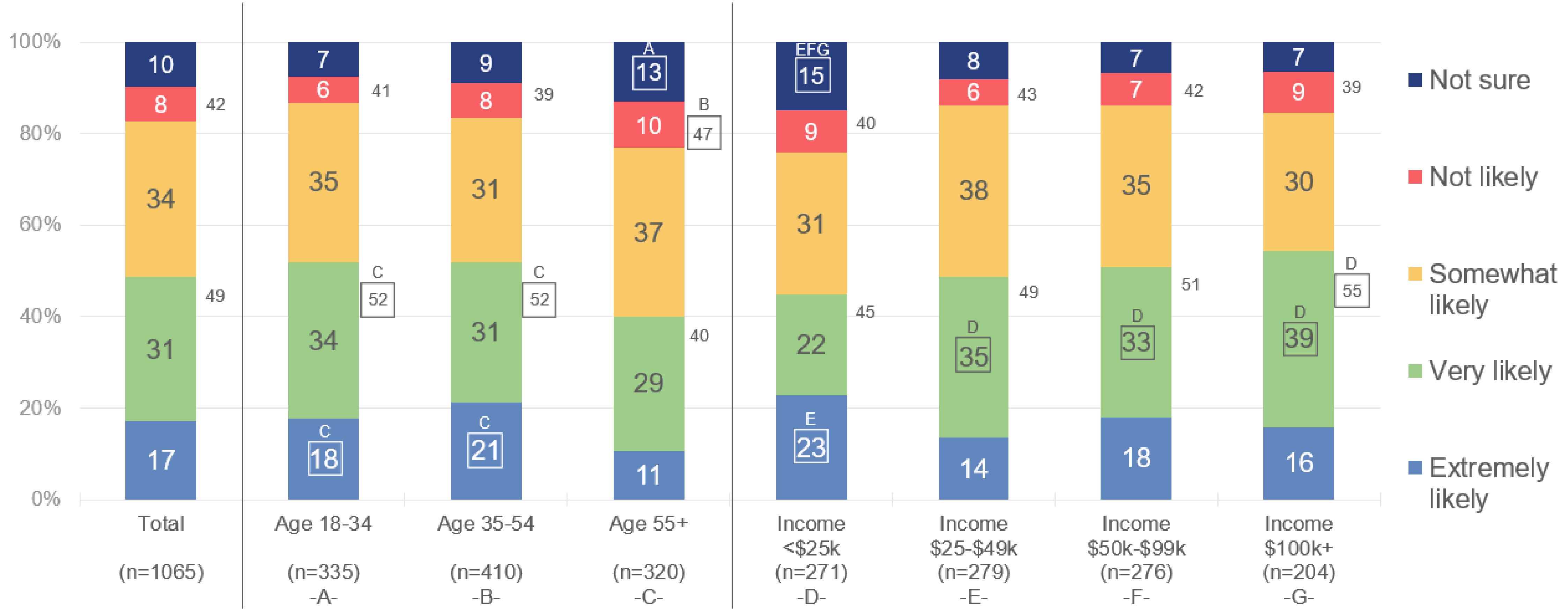
Q4 2021

Utility Leverage Increases for Customer Choices Relating to Solar/Clean Energy Recommendations



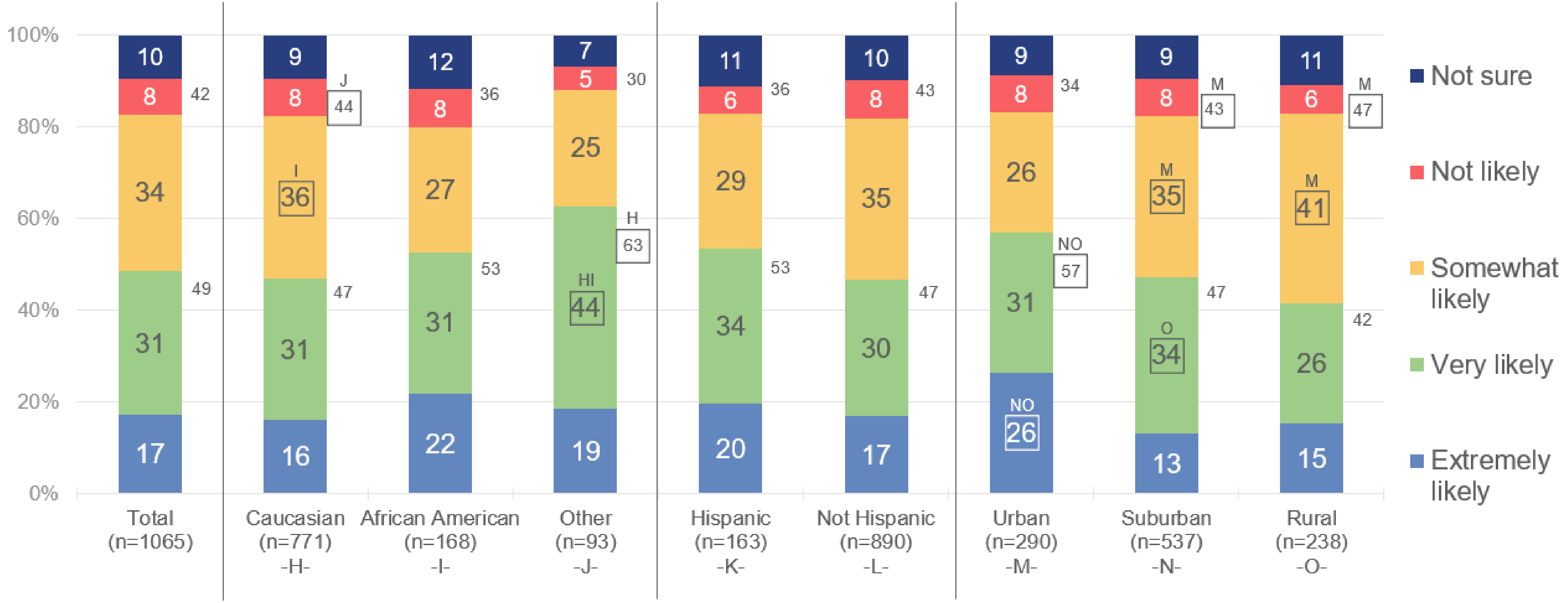
(Use of Utility Service Recommended Solar/Clean Energy Installer) Base Total Respondents. Q.B4c. If you were interested in solar energy or other clean energy options, would you be more likely to use a solar energy installer recommended by your electric utility?

Likelihood of Using a Service or a Technician Recommended and Endorsed by the Local Utility Higher Among Those Under 55 Years



Base: Total Respondents. M4. If you needed maintenance performed on your home how likely would you be to use a service or technician that was recommended and endorsed by your utility service provider?

Likelihood of Using a Service or a Technician Recommended and Endorsed by the Local Utility is Higher in Urban Areas and Among Non-Caucasian/Non-African Americans (continued)



	Total (n=1065)	Caucasian (n=771) -H-	African American (n=168) -I-	Other (n=93) -J-	Hispanic (n=163) -K-	Not Hispanic (n=890) -L-	Urban (n=290) -M-	Suburban (n=537) -N-	Rural (n=238) -O-
Not sure	10	9	12	7	11	10	9	9	11
Not likely	8	8	8	5	6	8	8	8	6
Somewhat likely	34	36 (I)	27	25	29	35	26	35 (M)	41 (M)
Very likely	31	31	31	44 (HI)	34	30	31	34 (O)	26
Extremely likely	17	16	22	19	20	17	26 (NO)	13	15
Not likely + Somewhat likely	42	44 (J)	36	30	36	43	34	43 (M)	47 (M)
Very + Extremely likely	49	47	53	63 (H)	53	47	57 (NO)	47	42

Base: Total Respondents. M4. If you needed maintenance performed on your home how likely would you be to use a service or technician that was recommended and endorsed by your utility service provider?

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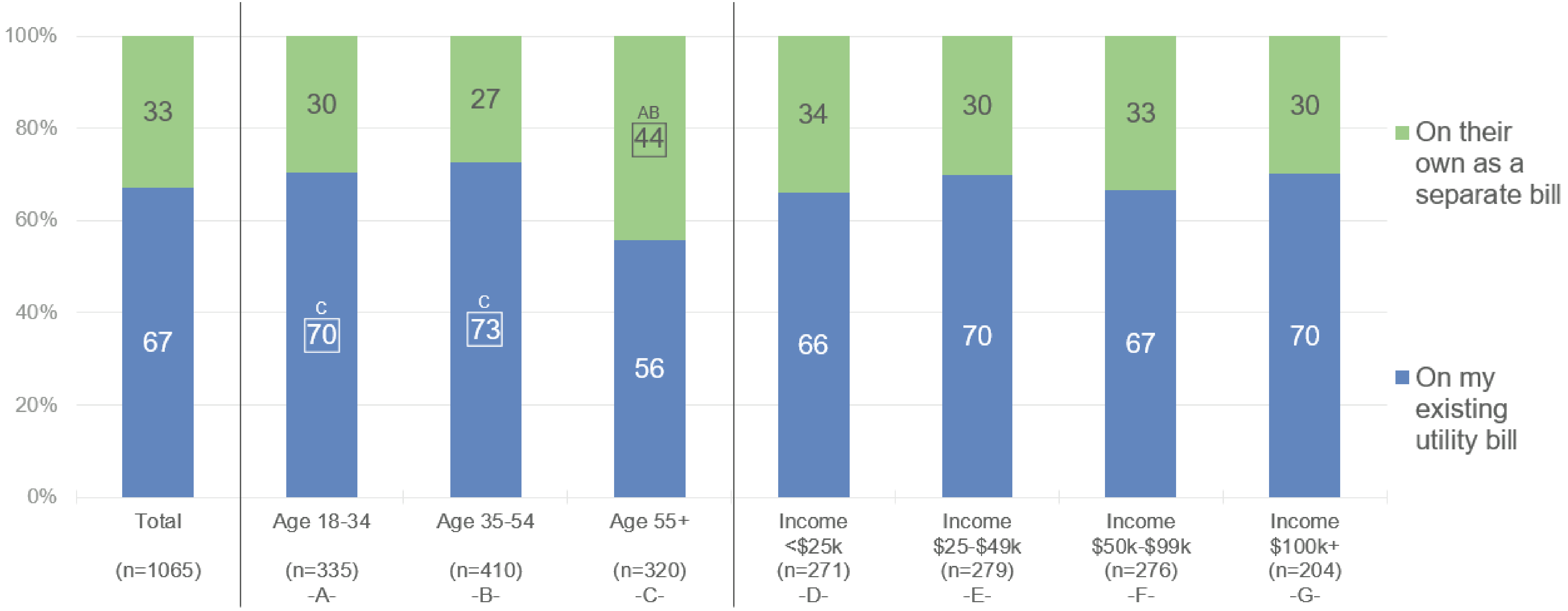
Payment Preferences for Additional Energy-related Home Products and Services

People Prefer to Pay for Additional Energy-related Home Products and Services on Existing Utility Bills



Base: Total Respondents. M8. If you were to pay for additional energy-related home products or services, would you prefer to pay for these as part of your existing utility bill or on their own as a separate bill?

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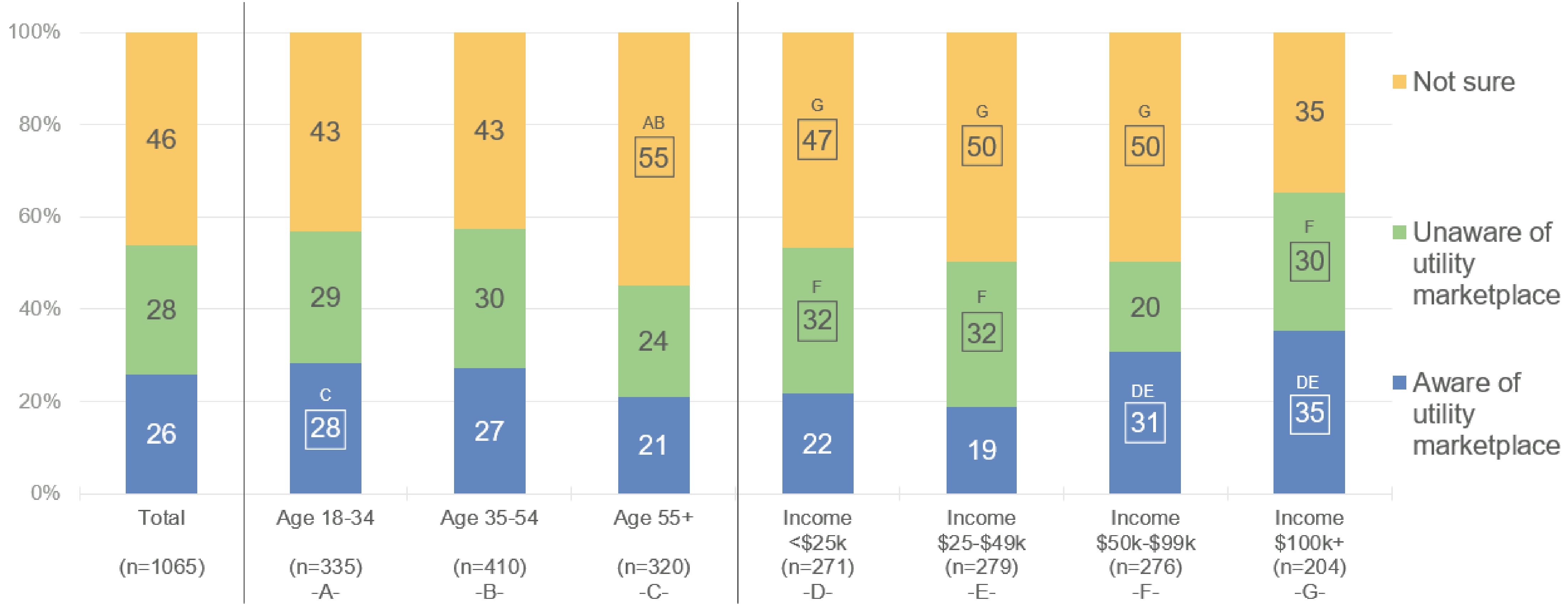
Awareness of Local Utility Marketplace for Energy-related Products and Services

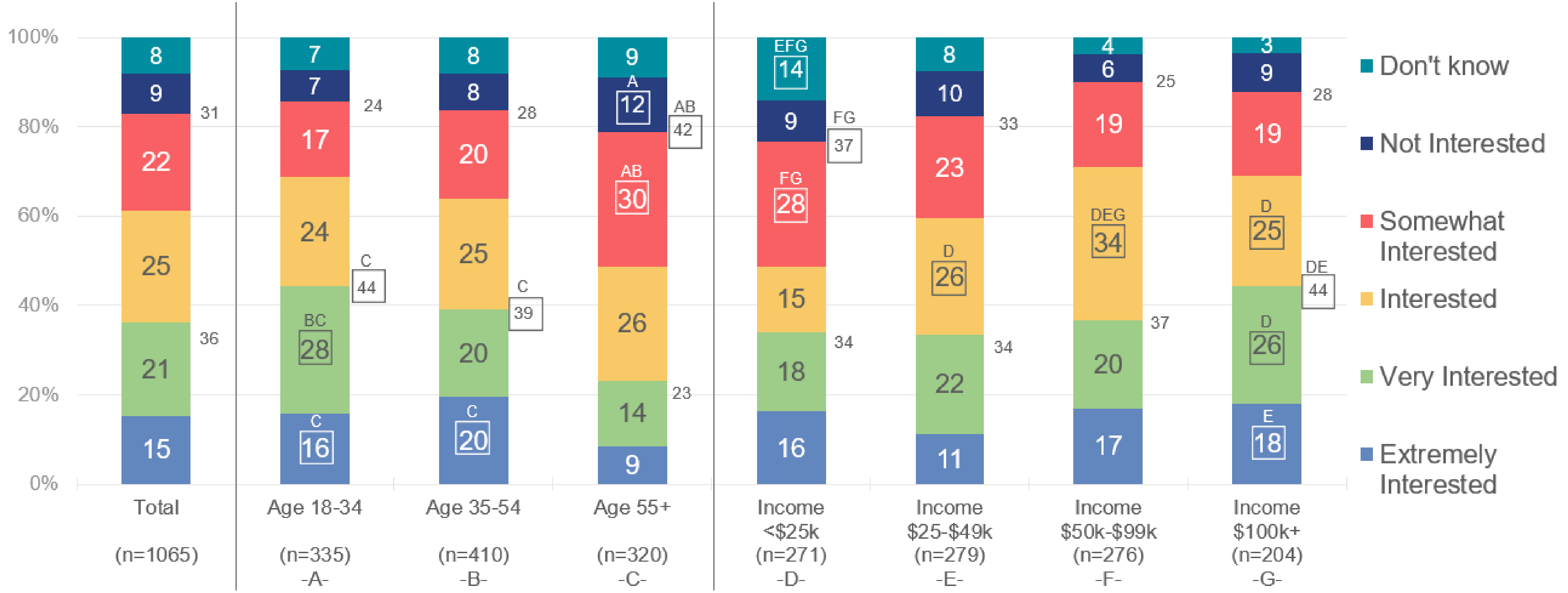
Awareness About Existence of Utility Marketplace for Energy-related Products and Services is Quite Low



Base: Total Respondents. M5. Many utilities have begun offering marketplaces for their customers to easily access and purchase energy-related home products and services. Do you know if your utility has a marketplace?

Interest in Checking Utility Marketplace for Offers About Energy-related Products and Services

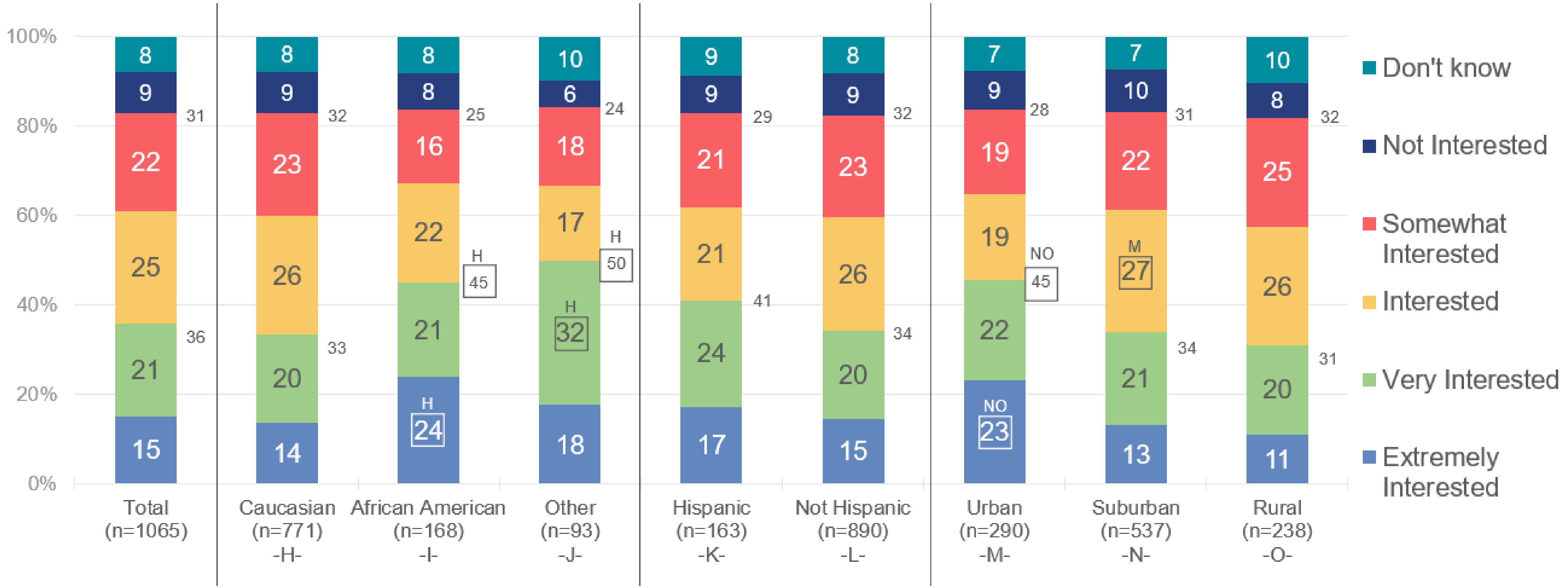
Interest in Checking Utility Marketplace for Offers About Energy-related Products and Services is Higher Among Adults Younger Than 55 Years



	Total (n=1065)	Age 18-34 (n=335) -A-	Age 35-54 (n=410) -B-	Age 55+ (n=320) -C-	Income <$25k (n=271) -D-	Income $25-$49k (n=279) -E-	Income $50k-$99k (n=276) -F-	Income $100k+ (n=204) -G-
Don't know	8	7	8	9	14 EFG	8	4	3
Not Interested	9	7	8	12 A	9	10	6	9
Somewhat Interested	22	17	20	30 AB	28 FG	23	19	19
Interested	25	24	25	26	15	26 D	34 DEG	25 D
Very Interested	21	28 BC	20	14	18	22	20	26 D
Extremely Interested	15	16 C	20 C	9	16	11	17	18 E
Not/Somewhat Interested (net)	31	24	28	42 AB	37 FG	33	25	28
Extremely/Very Interested (net)	36	44 C	39 C	23	34	34	37	44 DE

Base: Total Respondents. M6. If you heard that your local utility does have a marketplace for energy-related home products and services, how interested would you be to check out what is on offer?

Interest in Checking Utility Marketplace for Offers About Energy-related Products and Services is Higher in Urban Areas and Among Non-Caucasians (continued)



	Total (n=1065)	Caucasian (n=771) -H-	African American (n=168) -I-	Other (n=93) -J-	Hispanic (n=163) -K-	Not Hispanic (n=890) -L-	Urban (n=290) -M-	Suburban (n=537) -N-	Rural (n=238) -O-
Don't know	8	8	8	10	9	8	7	7	10
Not Interested	9	9	8	6	9	9	9	10	8
Somewhat Interested	22	23	16	18	21	23	19	22	25
Interested	25	26	22	17	21	26	19	M 27	26
Very Interested	21	20	21	H 32	24	20	22	21	20
Extremely Interested	15	14	H 24	18	17	15	NO 23	13	11
Not/Somewhat	31	32	25	24	29	32	28	31	32
Extremely/Very	36	33	H 45	H 50	41	34	NO 45	34	31

Base: Total Respondents. M6. If you heard that your local utility does have a marketplace for energy-related home products and services, how interested would you be to check out what is on offer?

Products and Services of Most Interest in a Utility Marketplace

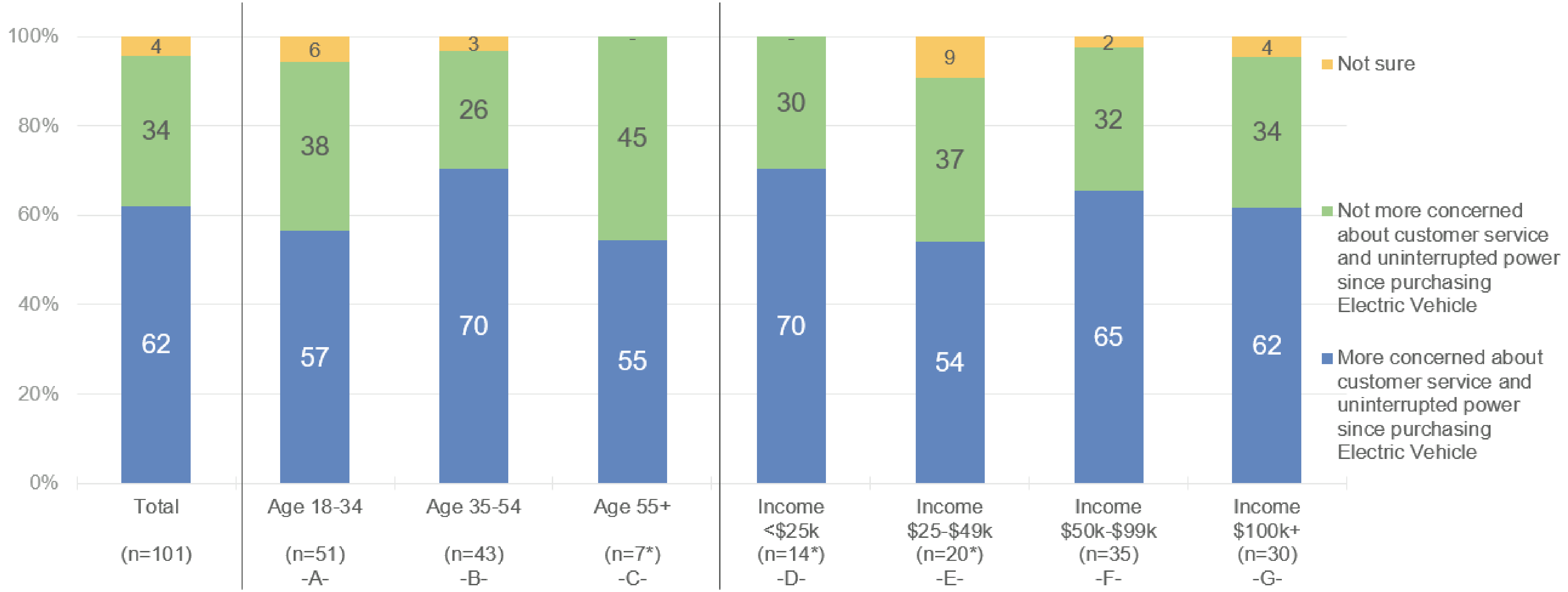
Solar Energy, Lighting Products, and Energy-Efficient Appliances Were Most Selected Among Eight Products and Services

		Age			Household Income			
	Total	18-34 -A-	35-54 -B-	55+ -C-	Under $25k -D-	$25k - $49k -E-	$50k - $99k -F-	$100k+ -G-
Total Respondents	(1065)	(335)	(410)	(320)	(271)	(279)	(276)	(204)
	%	%	%	%	%	%	%	%
Solar/renewable energy	40	42 C	44 C	31	36	42	42	38
LEDs or lighting products	35	36	34	37	38	35	33	34
Energy efficient appliances	35	36	37	32	34	37	37	34
Smart thermostats	28	28	24	32 B	23	26	33 D	30
Power surge protection	22	14	20	33 AB	28 FG	22	17	20
Battery storage	17	22 C	18 C	11	19	16	16	20
Home Warranties program	12	8	13 A	13	11	11	12	12
Electric vehicle charging units	11	14	10	10	9	12	11	12

M7. What products or services offered on a utility marketplace would be of most interest to you? Please select your top 2.

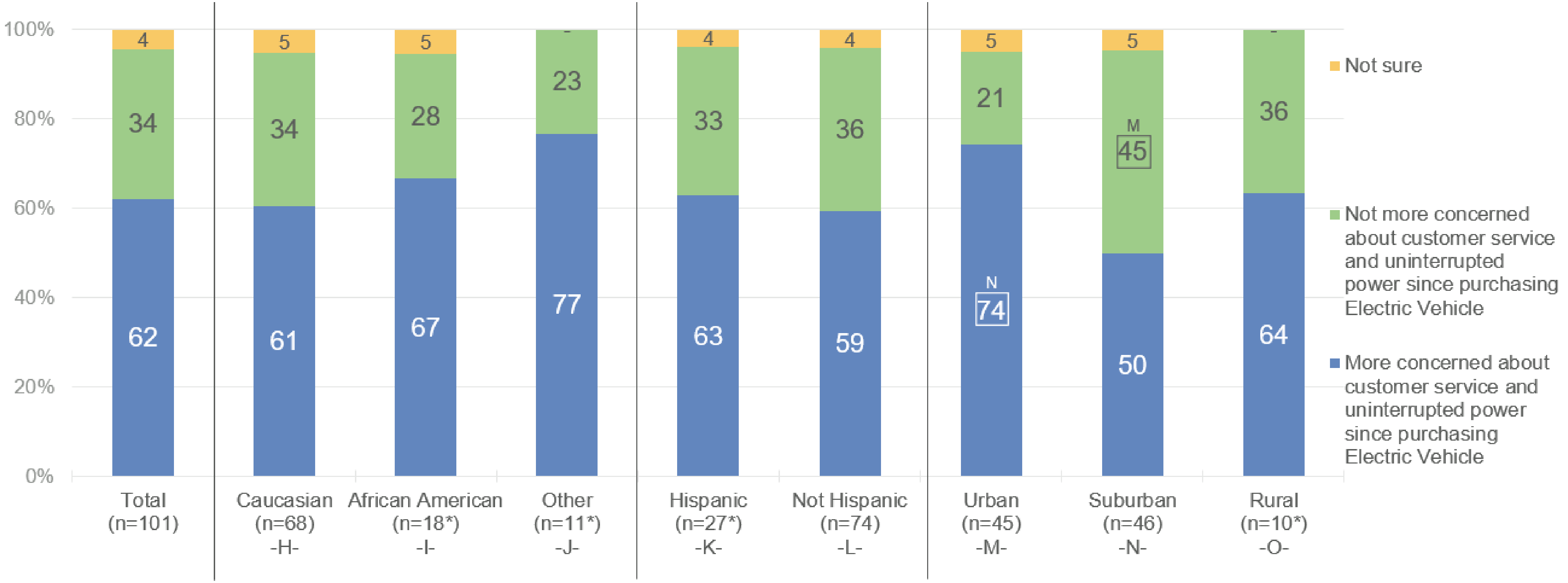
Level of Concern About Customer Service and Uninterrupted Power Since They Purchased Electric Vehicle

Six in Ten Are More Concerned About Customer Service and Uninterrupted Power Since Purchasing Electric Vehicle



Base: Total Purchased An Electric Vehicle. M10. Are you more concerned now about your electric utility’s customer service and ability to provide uninterrupted power than before you bought your electric vehicle?

People in Urban Areas Are Significantly More Concerned About Customer Service and Uninterrupted Power Since Purchasing Electric Vehicle (continued)

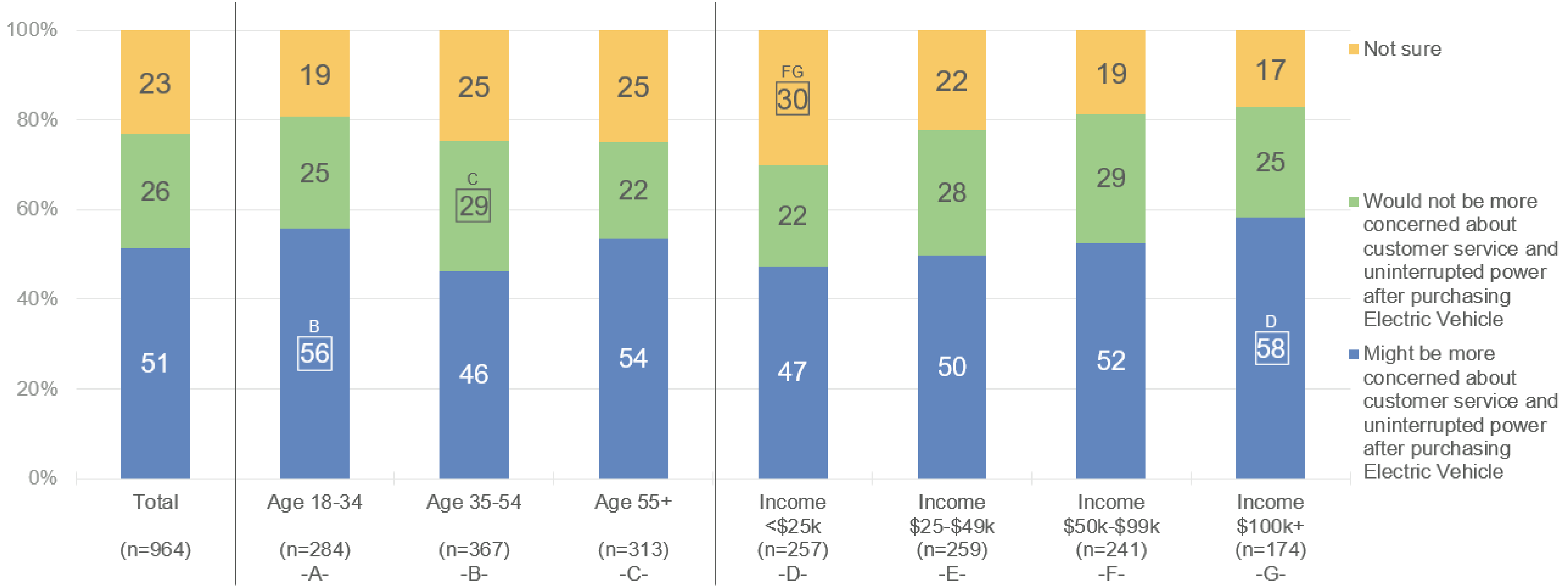


Base: Total Purchased An Electric Vehicle. M10. Are you more concerned now about your electric utility's customer service and ability to provide uninterrupted power than before you bought your electric vehicle?

Russell RESEARCH

Level of Concern About Customer Service and Uninterrupted Power Since Among Those Who May Purchase an Electric Vehicle in the Future

About Half of Those Who May Purchase an Electric Vehicle in the Future Level Might Be More Concerned About Customer Service and Uninterrupted Power



Base: Total Have Not Purchased An Electric Vehicle. M11. If you were to purchase an electric vehicle do you think you would be more concerned about your electric utility's customer service and ability to provide uninterrupted power than before you purchased an electric vehicle?

Concluding Remarks and Recommendations

- The BTM market represents a huge market opportunity for utilities and vendors. But to be successful, utilities and BTM vendors need to work together to provide a seamless CX and customer service model.
- To date, the market players have viewed the BTM market through their own lens. There is a strong rationale to view the BTM market through the customer's requirements and preferences. Otherwise, there are going to be gaps in the customer journey and the high potential for customer complaints.
- The finding of strong customer preference for on-bill financing and payment is indicative of how BTM is going to challenge the traditional customer service model and operations. The transactional aspects of BTM, e.g., payment and pricing, are an area where there absolutely needs to be cooperation and integration between the parties. BTM customers represent a different class of customer.

BTM 2022 Schedule:

Month	Event
January – March	• Member Onboarding and Interviews
March	• 2022 Official Kickoff Webinar (March 2nd)
April	• (April 21st) BTM Roundtable Discussion (Utility Only) • (April 20th) BTM Roundtable Discussion (Vendor Only)
May	• BTM Market Landscape Analysis & Review
June	• BTM Vendor Panel (Public Facing)
July	• Next Gen – Customer Requirements w/ Futurist Amber Mac (July 20th @ 2:00 EDT) • BTM Customer Survey Findings Released (July 28th @ 2:00 EDT)
August	• Quarterly Member & Vendor Roundtable Discussion (Aug 10th@ 3:00 EDT) • Future Utility Revenue Model Framework & Analysis
Ongoing	• Regulatory White Paper, Panel Discussions, Roundtables & Utility Presentation
Annual Conference	• December 8th – 9th in Tysons Corner, VA

Appendices

Questions, Survey Conducted June 3-6, 2022

M1. How would you rate your general interest in energy-related home products and services, anything from smart thermostats, renewable energy, new lighting, home warranty products, electric vehicles and accessories, etc.? (ALLOW ONE ANSWER)

- Extremely Interested
- Very Interested
- Interested
- Somewhat Interested
- Not Interested
- Don’t know

M2. How much do you trust what you hear from companies trying to sell energy-related home products and services to you? (ALLOW ONE ANSWER)

- Extremely Trustworthy
- Very Trustworthy
- Trustworthy
- Somewhat Trustworthy
- Not Trustworthy

M3. Would you trust the information on energy-related home products and services more if you received it from your local utility? (ALLOW ONE ANSWER)

- Yes {Would trust information more if from local utility}
- No {Would not trust information more if from local utility}
- Not sure

M4. If you needed maintenance performed on your home how likely would you be to use a service or technician that was recommended and endorsed by your utility service provider? (ALLOW ONE ANSWER)

- Extremely Likely
- Very Likely
- Somewhat Likely
- Not Likely
- Not sure

M5. Many utilities have begun offering marketplaces for their customers to easily access and purchase energy-related home products and services. Do you know if your utility has a marketplace? (ALLOW ONE ANSWER)

- Yes {Aware of utility marketplace}
- No {Unaware of utility marketplace}
- Not sure

Questions (continued)

M6. If you heard that your local utility does have a marketplace for energy-related home products and services, how interested would you be to check out what is on offer? (ALLOW ONE ANSWER)

- Extremely Interested
- Very Interested
- Interested
- Somewhat Interested
- Not Interested
- Don't know

M7. What products or services offered on a utility marketplace would be of most interest to you? Please select your top 2. (RANDOMIZE & ALLOW UP TO 2 ANSWERS)

- LEDs or lighting products
- Smart thermostats
- Energy efficient appliances
- Battery storage
- Electric vehicle charging units
- Solar/renewable energy
- Home Warranties program
- Power surge protection

M8. If you were to pay for additional energy-related home products or services, would you prefer to pay for these as part of your existing utility bill or on their own as a separate bill? (ALLOW ONE ANSWER)

- On my existing utility bill
- On their own as a separate bill

M9. Have you bought an electric vehicle? (ALLOW ONE ANSWER)

- Yes {Purchased an electric vehicle}
- No {Have not purchased an electric vehicle}

IF "YES" IN Q.M9, ASK Q.M10, OTHERWISE SKIP TO Q.M11.

M10. Are you more concerned now about your electric utility's customer service and ability to provide uninterrupted power than before you bought your electric vehicle? (ALLOW ONE ANSWER)

- Yes {More concerned about customer service and uninterrupted power since purchasing Electric Vehicle}
- No {Not more concerned about customer service and uninterrupted power since purchasing Electric Vehicle}
- Not sure

Questions (continued)

M11. If you were to purchase an electric vehicle do you think you would be more concerned about your electric utility's customer service and ability to provide uninterrupted power than before you purchased an electric vehicle? (ALLOW ONE ANSWER)

- Yes {Might be more concerned about customer service and uninterrupted power after purchasing Electric Vehicle}
- No {Would not be more concerned about customer service and uninterrupted power after purchasing Electric Vehicle}
- Not sure

M12. What is your level of responsibility for the energy-related home products and service decisions for your household? (ALLOW ONE ANSWER)

- I am the sole decision maker
- I share decision making with someone else
- I am not involved in these decisions

Demographics (1 of 6)

		Age			Household Income			
	Total	18-34 -A-	35-54 -B-	55+ -C-	Under $25k -D-	$25k - $49k -E-	$50k - $99k -F-	$100k+ -G-
Total Respondents	(1065)	(335)	(410)	(320)	(271)	(279)	(276)	(204)
	%	%	%	%	%	%	%	%
Gender								
Male	49	48	49	49	35	47 D	52 D	62 DEF
Female	50	50	51	51	62 EFG	52 G	48 G	37
Non-Binary	1	2	1	0	2	1	0	0
Mean Age	44.2	26.7	43.1 A	66.0 AB	41.8	43.3	45.5 D	46.2 D
Marital Status								
Married	48	27	55 A	61 A	23	39 D	60 DE	73 DEF
Not Married	52	71 BC	45	38	76 EFG	61 FG	40 G	27
Refused	1	1	0	1	1	1	-	-
Mean Household Size	2.9	3.3 C	3.2 C	2.1	2.7	2.9	2.9	3.2 DEF
Presence of Children								
Children Present	38	48 C	51 C	8	33	35	40	46 DE
No Children Present	62	52	49	92 AB	67 G	65 G	60	54
Parent Of Children In Household								
Parent	33	39 C	47 AC	5	26	30	36 D	42 DE
Not the Parent	67	61 B	53	95 AB	74 FG	70 G	64	58

Demographics (2 of 6)

		Racial Subgroups			Ethnic Subgroups		Type of Community		
	Total	**Caucasian** -H-	**African American** -I-	**Other** -J-	**Hispanic** -K-	**Not Hispanic** -L-	**Urban** -M-	**Suburban** -N-	**Rural** -O-
Total Respondents	(1065)	(771)	(168)	(93)	(163)	(890)	(290)	(537)	(238)
	%	%	%	%	%	%	%	%	%
Gender									
Male	49	48	49	54	29	53 K	50 O	54 O	36
Female	50	52	51	42	69 L	47	49	45	63 MN
Non-Binary	1	1	1	4 H	1	1	1	1	1
Mean Age	44.2	46.7 IJ	37.3	37.6	38.3	46.1 K	40.1	45.8 M	45.4 M
Marital Status									
Married	48	52 I	33	42	43	41	43	47	55 MN
Not Married	52	47	67 H	58	56	58	57 O	52 O	44
Refused	1	0	-	-	1	0	0	1	1
Mean Household Size	2.9	2.9	2.8	3.2 I	3.3 L	2.8	3.0	2.8	3.0
Presence of Children									
Children Present	38	36	43	44	47 L	33	44 N	35	38
No Children Present	62	64	57	56	53	67 K	56	65 M	62
Parent Of Children In Household									
Parent	33	31	39	35	40 L	29	39 N	30	32
Not the Parent	67	69	61	65	60	71 K	61	70 M	68

Demographics (3 of 6)

		Age			Household Income			
	Total	18-34 -A-	35-54 -B-	55+ -C-	Under $25k -D-	$25k - $49k -E-	$50k - $99k -F-	$100k+ -G-
Total Respondents	(1065)	(335)	(410)	(320)	(271)	(279)	(276)	(204)
	%	%	%	%	%	%	%	%
Education								
No College	33	38 C	32	27	56 EFG	43 FG	18 G	9
College	67	60	68 A	73 A	43	57 D	82 DE	91 DEF
Employment								
Employed	58	64 C	70 C	33	37	58 D	67 DE	74 DE
Not Employed	41	34	30	67 AB	61 EFG	41 FG	33	26
Household Income								
Mean (In thousands)	64.8	56.9	67.3 A	70.1 A	14.3	37.0 D	72.3 DE	150.8 DEF
Median (In thousands)	48.3	41.6	50.8	55.8	13.8	36.5	70.5	138.3
Home Ownership								
Rent	40	52 BC	42 C	23	62 FG	54 FG	30 G	12
Own	53	37	50 A	74 AB	24	39 D	66 DE	85 DEF
Other	7	10 C	8 C	3	14 EFG	7 FG	3	2
Type Of Community								
Urban	26	33 C	29 C	15	30	28	23	26
Suburban	50	46	48	58 AB	40	49 D	53 D	56 D
Rural	24	22	23	27	30 G	22	24	18

Demographics (4 of 6)

		Racial Subgroups			Ethnic Subgroups		Type of Community		
	Total	Caucasian -H-	African American -I-	Other -J-	Hispanic -K-	Not Hispanic -L-	Urban -M-	Suburban -N-	Rural -O-
Total Respondents	(1065)	(771)	(168)	(93)	(163)	(890)	(290)	(537)	(238)
	%	%	%	%	%	%	%	%	%
Education									
No College	33	31	27	45 HI	36	32	31	28	45 MN
College	67	69 J	72 J	55	63	68	68 O	72 O	55
Employment									
Employed	58	56	76 HJ	52	57	57	66 O	59 O	45
Not Employed	41	43 I	24	47 I	42	42	34	39	54 MN
Household Income									
Mean (In thousands)	64.8	66.9 I	57.5	63.3	64.8	62.5	64.5 O	69.5 O	55.1
Median (In thousands)	48.3	50.8	42.0	44.6 I	47.1	46.6	44.6	54.5	43.6
Home Ownership									
Rent	40	36	60 HJ	44	46	40	50 NO	38	33
Own	53	58 I	33	50 I	47	52	44	55 M	56 M
Other	7	7	7	6	7	8	6	6	10
Type Of Community									
Urban	26	22	44 H	35 H	46 L	24	100	-	-
Suburban	50	51	46	49	38	53 K	-	100	-
Rural	24	27 IJ	11	16	16	23 K	-	-	100

Demographics (5 of 6)

		Age			Household Income			
	Total	18-34 -A-	35-54 -B-	55+ -C-	Under $25k -D-	$25k - $49k -E-	$50k - $99k -F-	$100k+ -G-
Total Respondents	(1065)	(335)	(410)	(320)	(271)	(279)	(276)	(204)
	%	%	%	%	%	%	%	%
Hispanic Origin Or Descent								
Hispanic	15	22 BC	14 C	8	13	16	15	17
Not Hispanic	84	77	85 A	90 AB	85	83	85	83
Ethnic Background								
Caucasian	74	60	74 A	89 AB	70	72	75	82 DE
African-American	14	20 C	17 C	4	18 G	13	16 G	9
Asian/Pacific Islander	4	5	4	3	4	3	5	4
Native American	3	5 C	3	1	2	5 FG	2	2
Mixed ethnic background	1	3 B	0	1	2	1	0	3 F
Other	1	2 C	1	-	1	1	1	-
Refused	3	5 BC	2	2	3	4 G	2	1
Political Affiliation								
Democrat	35	31	40 A	33	30	35	38 D	37
Independent	25	29 C	24	22	26	25	24	25
Republican	28	23	24	38 AB	21	28	29 D	34 D
Other political party	2	3 C	2	1	4 G	2	2	1
Not registered to vote	10	14 C	11	6	19 EFG	9 G	7	3
Census Region								
Northeast	20	19	20	20	16	18	23	20
South	36	36	35	36	41	35	34	33
Midwest	23	23	23	23	23	25	21	24
West	22	23	22	20	20	22	23	23

Demographics (6 of 6)

		Racial Subgroups			Ethnic Subgroups		Type of Community		
	Total	Caucasian -H-	African American -I-	Other -J-	Hispanic -K-	Not Hispanic -L-	Urban -M-	Suburban -N-	Rural -O-
Total Respondents	(1065)	(771)	(168)	(93)	(163)	(890)	(290)	(537)	(238)
	%	%	%	%	%	%	%	%	%
Hispanic Origin Or Descent									
Hispanic	15	11	14	30 HI	100	-	26 NO	12	10
Not Hispanic	84	88 J	84 J	69	-	100	73	87 M	89 M
Ethnic Background									
Caucasian	74	100	-	-	55	76 K	61	75 M	84 MN
African-American	14	-	100	-	15	16	23 NO	13 O	6
Asian/Pacific Islander	4	-	-	44	4	4	4	6 O	1
Native American	3	-	-	30	6 L	2	3	2	3
Mixed ethnic background	1	-	-	16	4 L	1	4 NO	1	1
Other	1	-	-	10	4 L	0	1	0	2
Refused	3	-	-	-	13 L	1	3	3	4
Political Affiliation									
Democrat	35	31	62 HJ	30	37	35	42 O	37 O	23
Independent	25	24	26	30	33 L	23	27	25	22
Republican	28	33 IJ	5	22 I	17	29 K	19	26	40 MN
Other political party	2	2	2	7 H	4	2	2	2	3
Not registered to vote	10	10 I	4	12 I	9	11	9	10	12
Census Region									
Northeast	20	20 I	13	26 I	21	21	21	18	20
South	36	34 J	56 HJ	21	48 L	34	38	36	33
Midwest	23	24	23	19	5	26 K	19	22	29 MN
West	22	22 I	9	34 HI	26	20	22	24	18

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DEFG is a customer insights and advisory firm in the utility space. Through collaborative research, data analysis and peer-to-peer networking, we help our clients achieve ways to better serve their customers.