Who Are We
And Why Are We Here?

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ASES Member Survey • Fall 2019

- **Objective:** Assess member satisfaction and retention
- **Objective:** Segment the membership for customized attention
- **Objective:** Support immediate and long-range planning
- **Limitation:** Lack of baseline data on the ASES membership, which would validate whether segments are fully representative
- **Limitation:** Practical limits on length and depth of the survey
- **Limitation:** This presentation only covers 2—out of many—possible types of data filters.
Market Segmentation – Why?

- To clear the fog of “averages”
- To invite more meaningful engagement for impact and growth
- To prioritize staff time and dollars for greatest advantage
- To help map a path forward, addressing emerging member concerns
Averages Deceive

• On average members say they are likely to renew (83%)
• But the oldest segment say they are almost certain to renew (88%)
• And the young professionals subset say they are not so sure (70%)
• Guess which members are least likely to say ASES returns good value for the their money? (Answer: Men, 35-44; 62% Affirmative)
<table>
<thead>
<tr>
<th>Age 65 + (44% of Membership)</th>
<th>Age 18 - 34 (12% of Membership)</th>
</tr>
</thead>
<tbody>
<tr>
<td>14% Women</td>
<td>38% Women</td>
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<tr>
<td>66% Retired</td>
<td>33% Work in Solar-Related Field</td>
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<td></td>
<td>25% Students</td>
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<tr>
<td>25% Active Volunteers</td>
<td>9% Active Volunteers</td>
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<tr>
<td>42% Unaware of CECU</td>
<td>42% Have Used CECU</td>
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<tr>
<td>Most important to ASES Mission (%)</td>
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<tr>
<td>Solar Today (60)</td>
<td>Solar Tours (33)</td>
</tr>
<tr>
<td>Solar Tours (56)</td>
<td>Conference (32)</td>
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<tr>
<td>Conference (56)</td>
<td>CECU (32)</td>
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<tr>
<td>64% purchased PV or related equipment</td>
<td>67% purchased PV or related equipment</td>
</tr>
<tr>
<td>56% purchased home/bldg. improvements</td>
<td>24% bought home/bldg. improvements</td>
</tr>
<tr>
<td>Strikingly little direct engagement. No single product or service was used by &gt;25%, except for Solar Today. All but 4 products and services are unknown to &gt;25% of this group.</td>
<td>Direct engagement by &gt;25% in Solar Today, CECU, Conference. Every product and service is unknown to &gt;25% of this group.</td>
</tr>
<tr>
<td>81% say ASES is a good value</td>
<td>69% say ASES is a good value</td>
</tr>
</tbody>
</table>
Mid- to Late-Career Members
Age 45 to 64 (38%)

- Only 12% are retired; 25% work in solar-related jobs (relatively low).
- 20% are women
- Most important to ASES Mission:
  - Solar Tours (51)
  - Conference (51)
  - Solar Today (50)
- Also frequently listed (30 to 36%): Chapters, Webinars, Solar@Work, Divisions. Note that these are relatively new or revived products and services.
Data Diving

• ASES members under age 44 had a very different view of the ASES Mission than the oldest members. Among the elders more than 30% voted for every possible item on the list, except for one. (Poor little Tiny Watts!)

• New ASES products and services are universally well-liked, including Webinars, Solar@Work, and above all CECU. Job Board? OK Boomer... 39% of the oldest members think it is important to the Mission, but only 8% of those under age 44 agree!

• According to a Pew Research poll in late spring 2020, 71% of adults under 30 said climate change is a major threat; only 54% of those over 50 agreed. Even among young Republicans, climate is a concern for more than half, and support for solar energy nearly matches that of the Democrats polled.
Younger Segments Tend to Be More Diverse

- ASES elders are 14% women; Aged 18-34, 38% are women
- We did not poll for race/ethnicity, but... In 2019, 73% of the solar workforce was white (Solar Foundation/SEIA).
- Solar 2018 included tracks on Broadening Access to Solar; a diverse set of speakers in keynote and special sessions.
- These are voices we need.

League of Conservation Voters 2020 Poll tested likely Democratic voters’ views on climate change. Climate Justice is a driving concern.
• 34% of all those surveyed say they spend 3 or more hours reading the magazine in print. 66% of this subset named *Solar Today* as important to the ASES Mission.

• Yet 46% of this subset say they would spend the same amount of time or more time with each issue, if it were only produced digitally.

• Notably, avid *Solar Today* readers generally report *negligible* direct involvement with other ASES products and services. What can we do to bring them in touch with *activities* they say are important to our Mission. Tours, Conferences, Webinars, Chapters, Divisions—all were ranked as Important to the Mission by more than 45% of them.
Marketing Strategy Could Affect These Sample Placements

Active Member Engagement
With High Growth Potential

Passive Member Engagement
With High Growth Potential

Passive Member Engagement
With Low Growth Potential

Active Member Engagement
With Low Growth Potential

Solar@Work
Webinars

Conference Tours
Awards
Divisions
Chapters
Credit Union/s

Career Info
Journals

Moving Toward Active Engagement >>

Total Market
Size >

Tour

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Conclusions

• General agreement on the value of ASES Media, Conferences, Tours, and the Clean Energy Credit Union.

• Our oldest members are faithful, but disengaged.

• Our younger members comprise a small group that perceives relatively less value in ASES. But they are diverse and committed. Show them why to come and stay.

• Mid- to late-career solar professionals are going elsewhere. Offer them support and an outlet independent of their employers?

• ASES has relatively strong membership from solar proponents with a history of purchasing PV, related products and home or building improvements. Combined with credit union financing, we know how to get local solar done.