

Who Are We And Why Are We Here?

June 25, 2020



AMERICAN
SOLAR
ENERGY SOCIETY

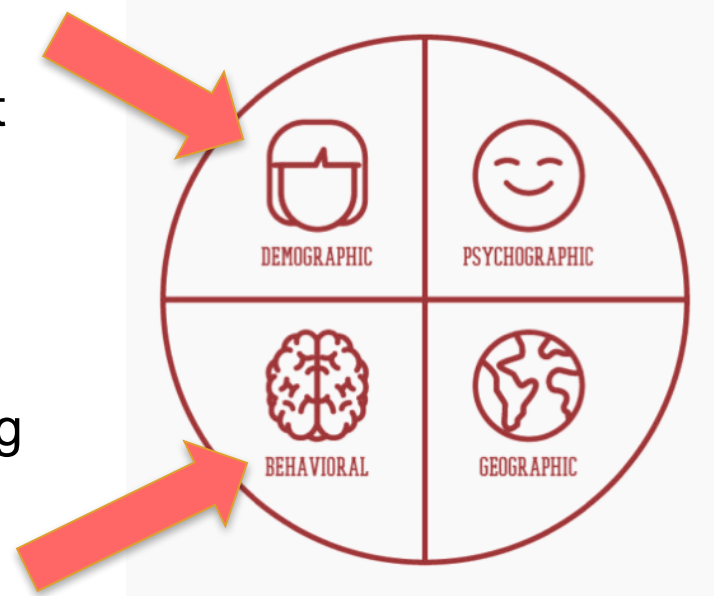
Jill K. Cliburn
jkcliburn@cliburnenergy.com

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?

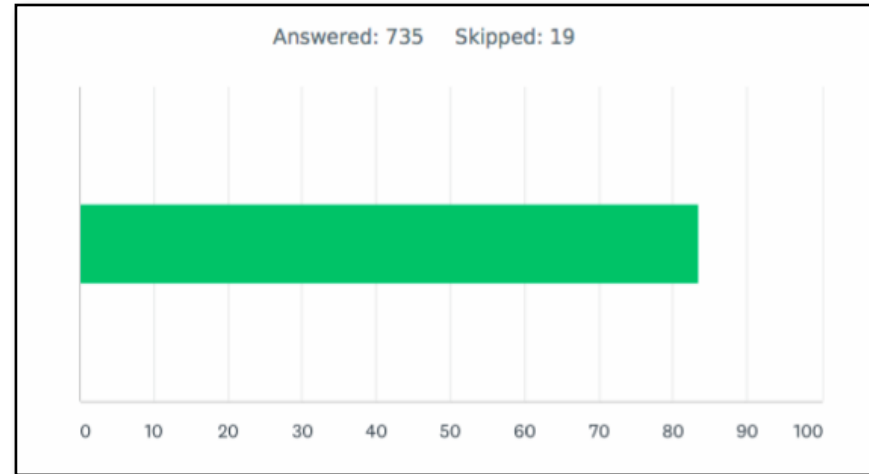
- To clear the fog of “averages”
- To invite more meaningful engagement for impact and growth
- To prioritize staff time and dollars for greatest advantage
- To help map a path forward, addressing emerging member concerns



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)

How Likely Are You to Renew? (Average)



Younger than 18

18 to 24

25 to 34

35 to 44

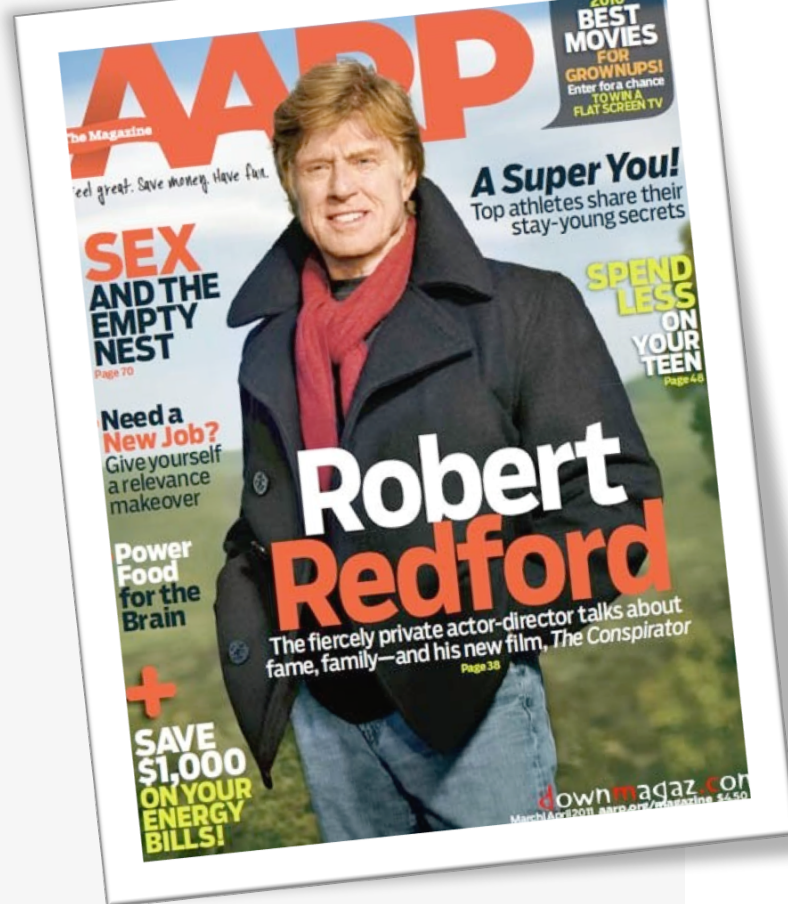
45 to 54

55 to 64

65 to 74

75 or older

0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%



www.suddenlysenior.com/advertising-to-seniors

Age 65 + (44% of Membership)	Age 18 – 34 (12% of Membership)
14% Women	38% Women
66% Retired	33% Work in Solar-Related Field 25% Students
25% Active Volunteers	9% Active Volunteers
42% Unaware of CECU	42% Have Used CECU
Most important to ASES Mission (%) Solar Today (60) Solar Tours (56) Conference (56)	Most important to ASES Mission (%) Solar Tours (33) Conference (32) CECU (32)
64% purchased PV or related equipment 56% purchased home/bldg. improvements	67% purchased PV or related equipment 24% bought home/bldg. improvements
Strikingly little direct engagement. No single product or service was used by >25%, except for Solar Today. All but 4 products and services are unknown to >25% of this group.	Direct engagement by >25% in Solar Today, CECU, Conference. Every product and service is unknown to >25% of this group.
81% say ASES is a good value	69% say ASES is a good value

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.

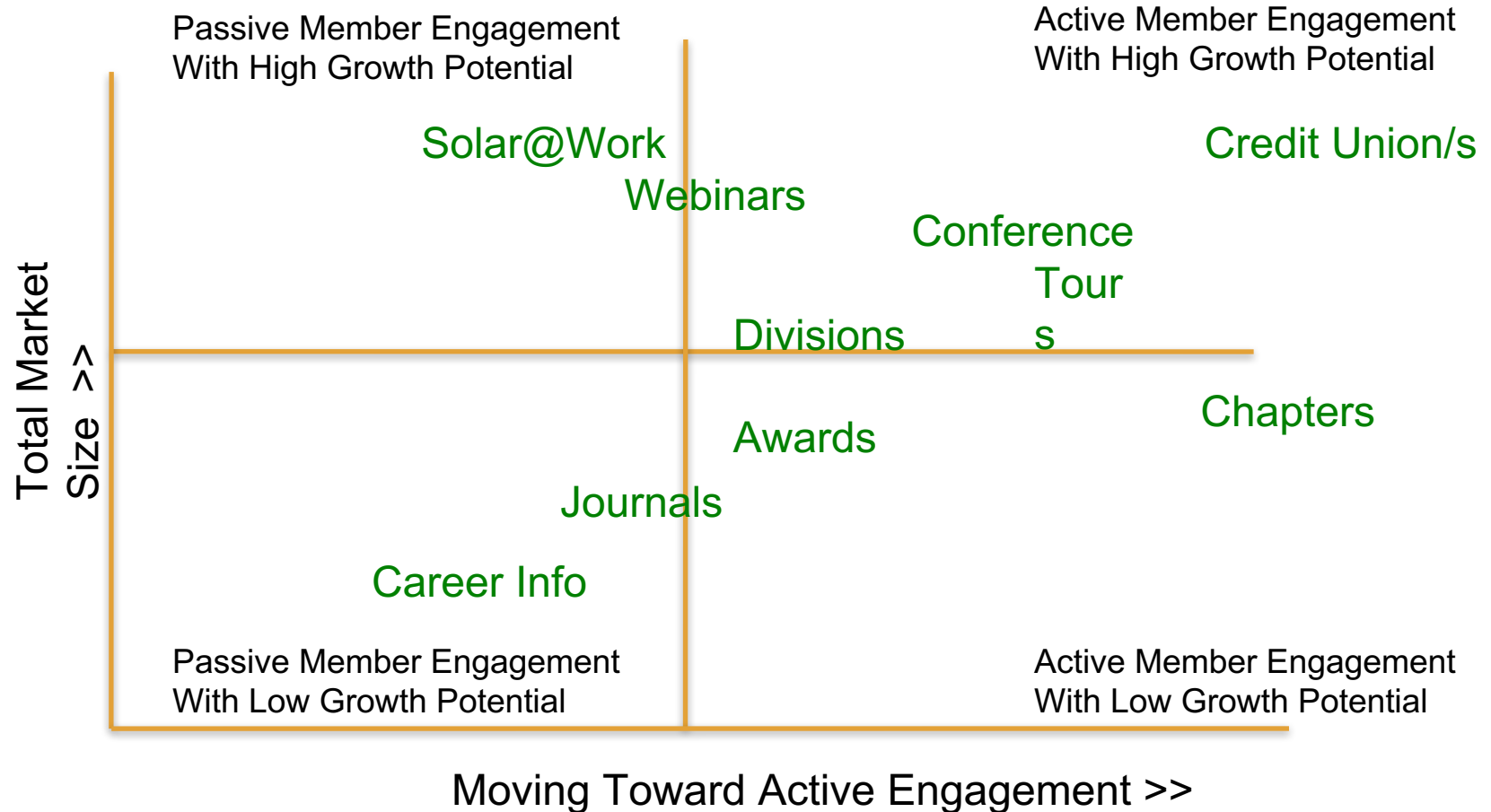
*League of Conservation Voters
2020 Poll tested likely Democratic
voters' views on climate change.
Climate Justice is a driving concern.*

	Already feeling	Not yet/ worry	Doubts/not a concern
Whites	46%	46%	8%
African Americans	49%	36%	15%
Hispanics	54%	35%	11%
AAPI	56%	30%	14%



- 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



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.***