

# **How Customer-centered Research Led to a Focus on Products Instead of People**

Marti Frank, Director, Shift Consortium

January 29, 2026

SHIFT CONSORTIUM

# Expanding Access by Increasing Affordability

The Shift Consortium brings together forward-thinking utilities committed to ensuring energy-efficient products are accessible to customers who shop at the lowest price points. Through collaboration and innovation, we're transforming how efficiency programs serve all communities.



# Shift Consortium

## 2026: Activities to

### Increase Affordability



#### **In-Store Instant Rebates**

Point-of-sale discounts that remove barriers at the moment of purchase



#### **Utility-Manufacturer Partnerships**

Strategic collaborations to bring affordable efficient products to market



#### **Customer Research**

Deep ethnographic studies understanding low-price-point buyer behavior



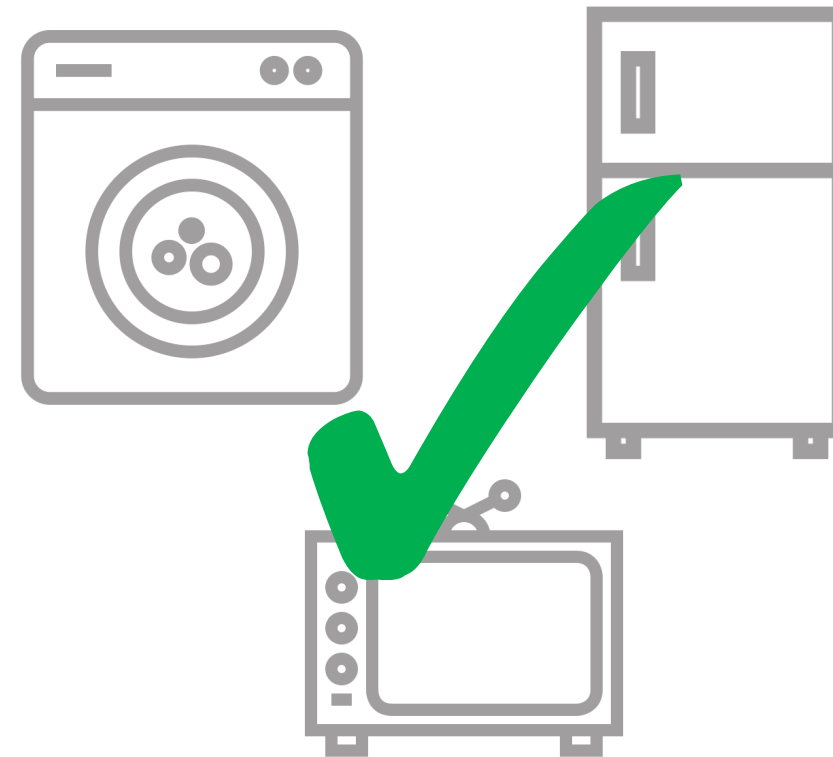
#### **Affordability Rankings & Awards**

Recognition programs highlighting accessible efficiency champions

**If You Only Remember  
One Thing from this  
Presentation:**



**If You Only Remember  
One Thing from this  
Presentation:**



2012

CALIFORNIA

EVALUATION

RESEARCH

# The First

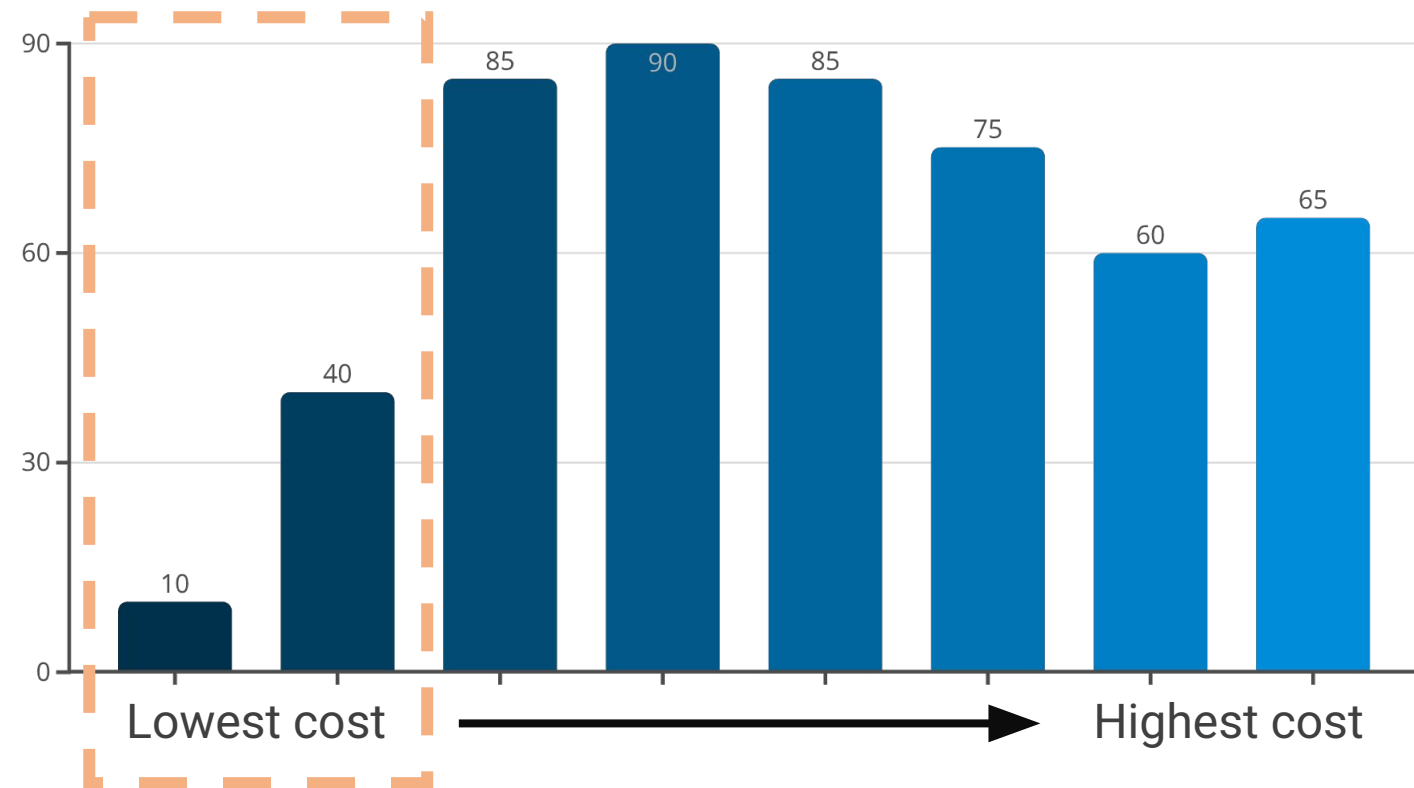
## Discovery:

### A \$1,000 Divide

At the lowest price points where a high volume of sales occurred, ENERGY STAR models were scarce and (relatively) expensive.

**ENERGY STAR incremental cost averaged \$100** (20-25% more) and far exceeded the \$30 rebate.

ENERGY STAR Refrigerator Availability by Price Point (%)

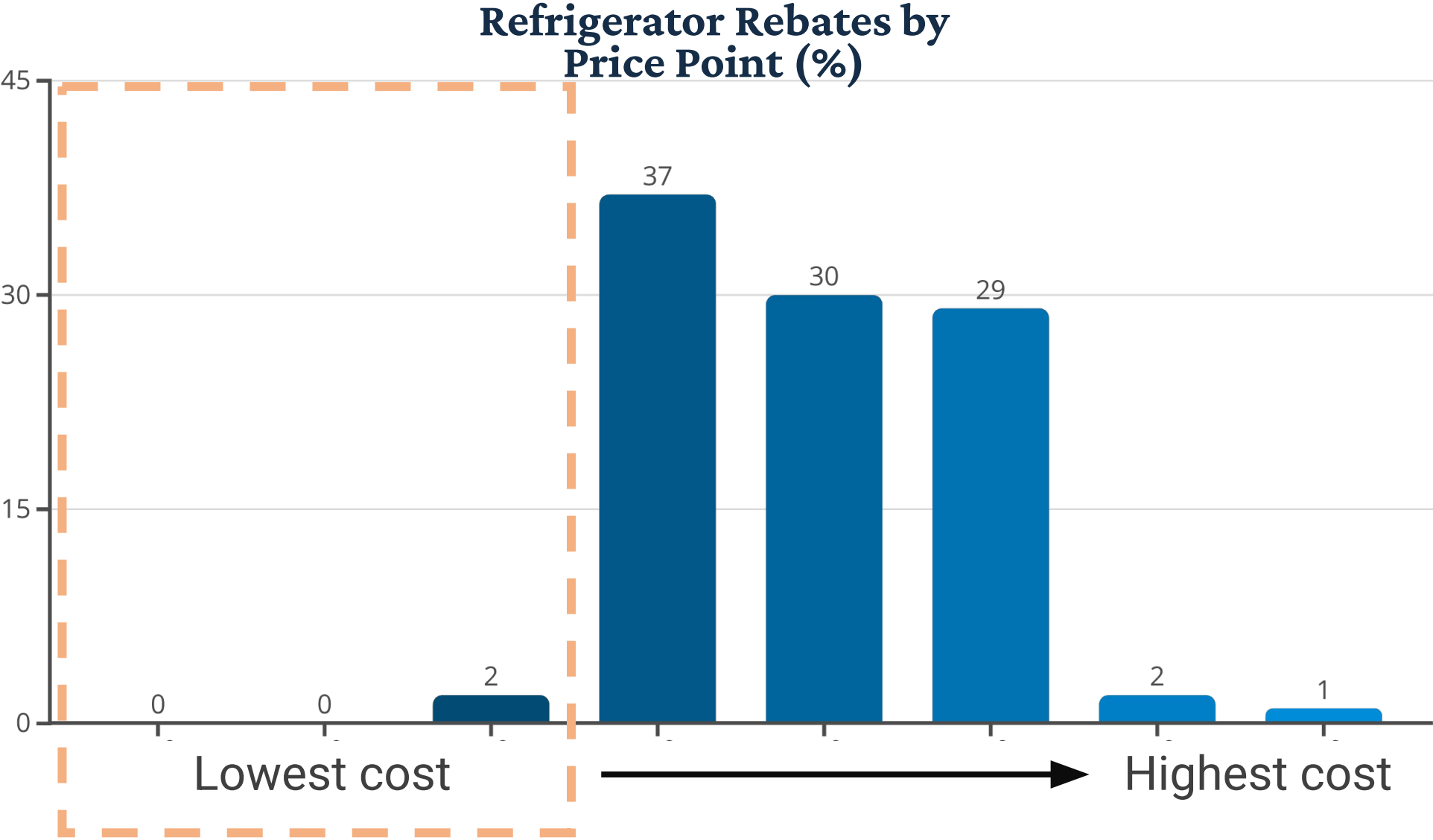


Source: Frank, Marti, Jane Peters, and Dave Canny. 2012. "A Systematic Approach to Evidence-Based Appliance Program Design." ACEEE Summer Study on Energy Efficiency in Buildings.

# Price Point Analysis Revealed

## the Rest of the Story

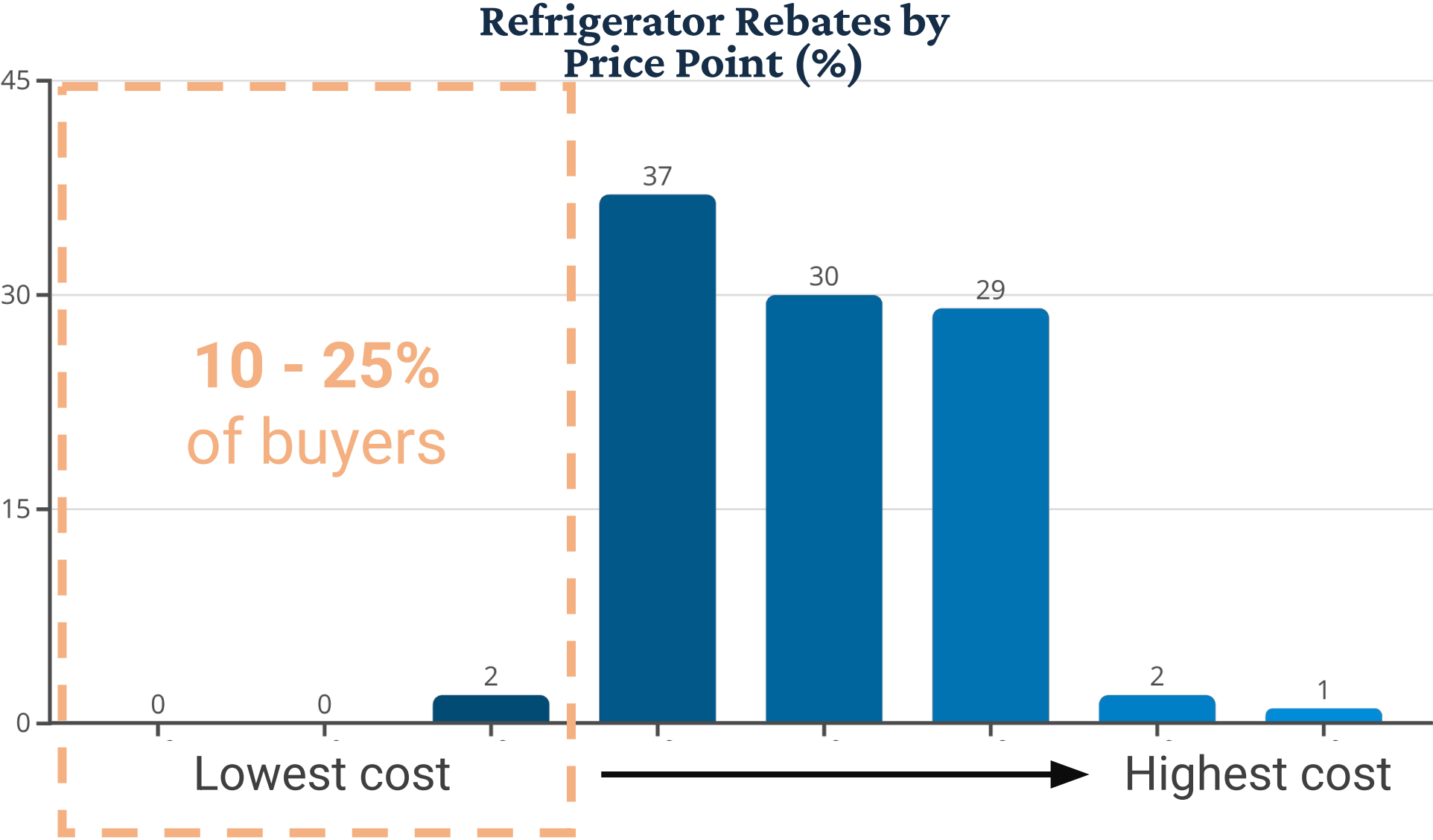
When we mapped rebate distribution against MSRP, the inequity became undeniable. The program was **systematically missing** an entire segment of the market—and the people shopping in it.



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2016

CALIFORNIA

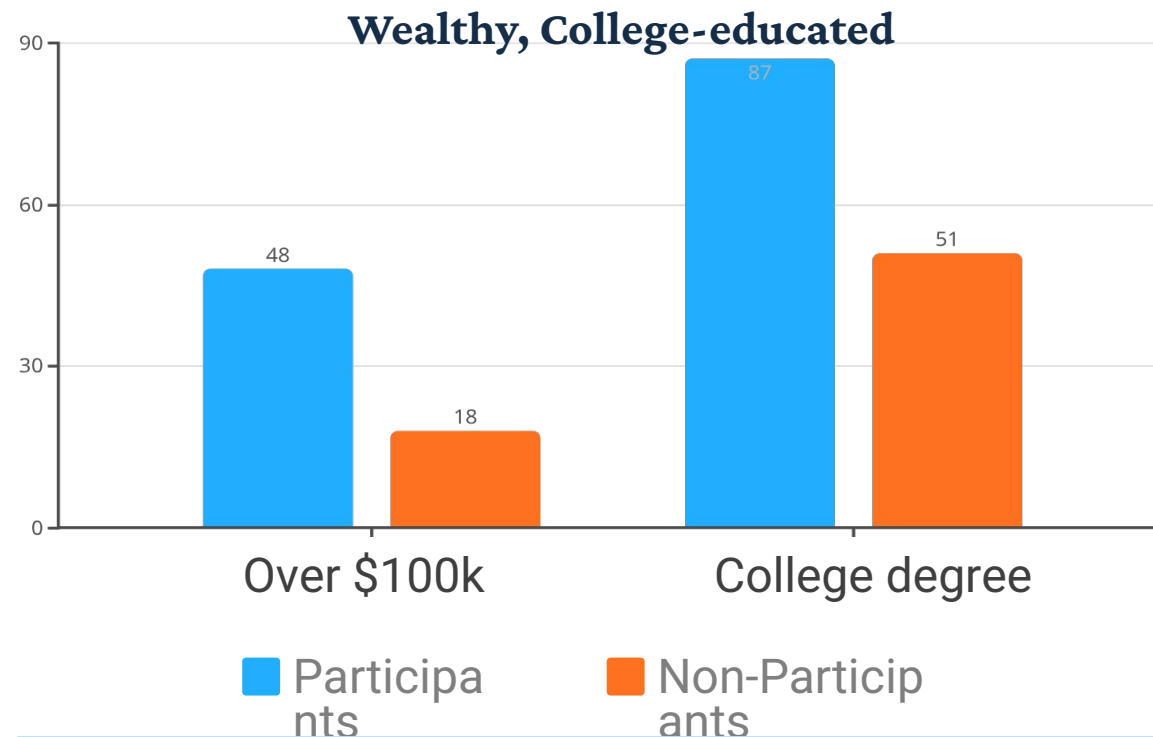
DEMOGRAPHICS

META-STUDY

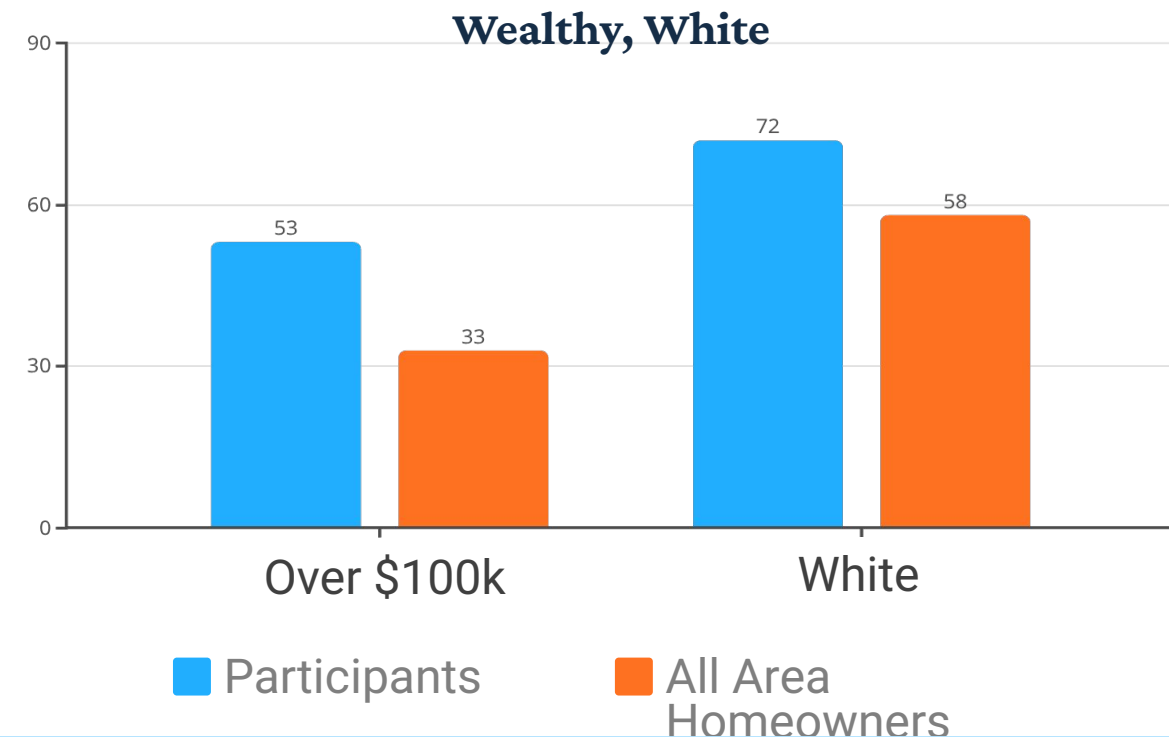
# The Second Discovery: Who We Left Behind

Our 2016 California study was one of the first to focus on the comparative demographics of participants vs. non-participants in general population programs. The findings were striking—and revealed an industry blind spot.

**Appliance Participants:**



**Home Retrofit Participants:**



Source: Frank, Marti and Seth Nowak. 2016. "Who's Participating and Who's Not? The Unintended Consequences of Untargeted Programs." ACEEE Summer Study on Energy Efficiency in Buildings.

2025, 2023, 2020

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CUSTOMER

INSIGHT

STUDIES

# Low-priced buyers' demographics aren't changing

Our 2020, 2023, and 2025 customer studies are consistent with the original 2016 research, and show buyers of low-priced products have lower incomes and are more financially fragile than people who pay more. They also include a large proportion of renters, people of color, and people without college degrees.

**61%** are below median income for their area

**30%** say they live "paycheck to paycheck"

**28%** qualify for SNAP benefits

**15%** used a high-interest loan (like an auto loan)

**9%** received a disconnection notice and/or energy assistance

2025, 2023, 2020

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**30%** renters

**22%** live in apartments

**45%** identify as a person of color

**33%** do not have a college degree



# Benefits of Product-focused

## Design

**Implementation** Identify products by price, size, configuration, etc.

- **No Barriers to Access**  
We don't ask intrusive questions before offering discounts
- **Inclusive by Design**  
We don't screen out landlords. We don't exclude people who have money but choose not to spend it on appliances.
- **Evidence-Based Approach to Serving Diverse Populations**  
Our firm targeting low-priced products reaches a more diverse population who are missed by typical rebate programs.

# Focus on Low-cost Products Guides Strategy and Action

## Offer Rebates Everywhere - No Geographic Targeting

Sales data show *every store* sells a high volume of low-priced products—geographic targeting wouldn't serve our mission

1

## Go to the Source of the Problem

Develop partnerships with manufacturers to share SimplyEfficient specification and customer research, bring products to market that fill the low-price/high-efficiency gap

2

3

4

## See the Market from the Buyer's Perspective

Ethnographic research with buyers shows their unique characteristics: brands, features, shopping and research habits

Product research distinguishes variations by brand, configuration, size;

## Next Steps

**Aggregate demand** to reduce manufacturer risk and encourage production of high-efficiency, low-cost models  
**Honor industry leaders** to raise visibility of affordability issue

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