

# **2012 Oregon Residential Awareness & Perceptions Study**

## **Final Report**

**Funded by EnergyTrust of Oregon**  
Prepared by OnTarget Consulting & Research

September, 2012

## **Table of Contents**

Introduction & Executive Summary	3- 4
Moving-forward insights and recommendations	5
Sampling methodology	6 - 7
Detailed Findings	8 - 22
Survey tool	23 - 31

## **Introduction & Executive Summary**

This report summarizes the results and key findings from the fifth annual Energy Trust of Oregon Residential Awareness and Perception Study. The purpose of the study was to provide Energy Trust staff with insights into the awareness and perceptions that the residential electric and/or natural gas customers located in its service territory had regarding its actions and marketing efforts, energy efficiency, renewable energy and related topics. Study results will be used to help design and support marketing efforts and implementation of current and future Energy Trust programs and communication efforts.

### **Key Findings/Dominant Themes**

- Overall awareness of Energy Trust has increased vs. previous years in each of the four regions it serves and with all but one of the utilities it serves.
  - 61% of survey respondents reported being aware of Energy Trust in the 2012 survey, up from 56% in 2011 and 48% in 2010.
  - Awareness of Energy Trust in all of the geographical areas it serves was equal or higher in 2012 vs. 2011.
  - Respondents in the Portland Metro area reported the highest awareness of any region, with 66% of Portland Metro respondents reporting being aware of Energy Trust.
  - Customers from all but one of the utilities that Energy Trust serves reported equal or higher awareness of Energy Trust in 2012 vs. 2011. The small decrease in awareness from customers of Cascade Natural was within the statistical margin error, thus it was not a statistically significant decrease in awareness.
  - Customers of NW Natural reported the highest awareness of all utilities, with 72% of NW Natural respondents reporting being aware of Energy Trust.
  
- Oregon residents continue to show strong interest in taking actions that will conserve energy and reduce their energy costs.
  - Over 41% of survey respondents reported being more interested in taking additional actions to conserve energy and reduce energy costs than most people. Over 54% of respondents reported being about average with other people in their desire to take actions to conserve energy and reduce energy costs. Approximately 4% of respondents reported being less interested than others in their desire to take actions to conserve energy and reduce energy costs.
  
- Energy Trust continues to be well respected and trusted by the residents in its service territory. It is especially well respected and trusted by those that have used or received its services in the past.
  - Over 70% of all survey respondents gave Energy Trust a score of 4 or 5 (on a 1 – 5 scale) when asked if Energy Trust was a credible source of information to learn about energy efficiency and renewable energy.
  - Over 90% of survey respondents who had previously used Energy Trust services reported it as a credible source of information to learn about energy efficiency and renewable energy.

- Energy Trust is the preferred source to get information about ways to conserve energy and reduce energy costs.
  - Over 56% of survey respondents reported that Energy Trust would be the first organization they would recommend to others as a source to get information about ways to conserve energy and reduce energy cost, placing it as the most preferred source to get energy conservation information.
- The utilities Energy Trust serves are important and effective partners in driving use of Energy Trust services.
  - More respondents who first heard of Energy Trust from their gas and/or electric utility reported participating in Energy Trust services than from any other information source. Nearly 30% of survey respondents who first heard of Energy Trust through their gas and/or electric utility reported having used Energy Trust services.
- Oregon residents are aware of the types and breadth of service provided by Energy Trust.
  - Nearly 60% of survey respondents reported being aware of one or more of the residential services provided by Energy Trust.
  - The best known products and services include offering cash incentives to have old refrigerators or freezers recycled, offering cash incentives to residents who purchase more energy efficient refrigerators, freezers and clothes washers, and providing energy saver kits.
- Saving energy and money are the main reasons Oregon residents pursue energy-saving or renewable energy projects.
  - “Saving energy and money” was reported as the strongest motivation to take energy conservation actions vs. “enjoying a comfortable and more energy efficient home” and “save energy and the planet”.

## **Moving-Forward Insights & Recommendations**

Research findings indicate that Energy Trust's current marketing efforts are effective in increasing awareness and promoting use of Energy Trust services. The following insights concerning areas of marketing focus, messaging and potential market segmentation were gained from the study.

As previously reported, marketing and promotional messaging should communicate that people can save energy and money by using Energy Trust services. Additionally, providing detailed information about rebates and cash incentives is desired by all residents, regardless of whether they have taken advantage of Energy Trust services in the past.

Residents indicate that they have a slight preference to receive information on Energy Trust services directly from Energy Trust although they also report being comfortable in getting information from either Energy Trust or their local electric and/or gas utility.

A review of findings also identified three potential target audiences where more focused marketing efforts may result in increased awareness and use of Energy Trust services.

### **Target Audience #1 Consumers who are aware of Energy Trust and have used its services**

This segment accounts for 21% of the market and has expressed a willingness and interest in using additional Energy Trust services. Respondents in this segment reported having established relationships with the utilities that serve them and contractors that they have previously used to take advantage Energy Trust services.

It is recommended that Energy Trust continue to develop and strengthen collaboration programs with utilities and contractors to re-introduce Energy Trust services to this segment. It is also suggested that it review current media placement strategies to assure that this segment is effectively being reached. If marketing strategies and budgets allow for specific customer segmentation, the messaging to this segment should focus encouraging past Energy Trust users to consider taking advantage of Energy Trust services again.

### **Target Audience #2 Consumers who are aware of Energy Trust but haven't used Energy Trust Services**

This segment is the largest market segment by size, representing 40% of the market. Many in this segment report interest in taking actions to reduce energy consumption and save money in the next 12 months. It is recommended that Energy Trust work through all communication channels to help this segment understand the breadth and depth of Energy Trust services that they can take advantage of.

### **Target Audience #3 Consumers who are not aware of Energy Trust and not used Energy Trust Services**

This segment accounts for 39% of the market. The primary focus with this segment needs to be increasing the awareness of Energy Trust and inviting people in this segment to take an easy "first step" to reduce energy consumption and save money.

## MEMO

**Date:** October 19, 2012  
**To:** Board of Directors  
**From:** Sarah Castor, Evaluation Sr. Project Manager  
Sue Fletcher, Communications and Customer Service Sr. Manager  
Susan Jamison, Homes Marketing Manager  
**Subject:** Staff Response to the 2012 Oregon Residential Awareness and Perceptions Study

This year was our fifth annual Residential Awareness and Perceptions Study. As in previous years, a primary goal of the survey was to assess Oregonian's awareness of Energy Trust and energy efficiency in general to track changes over time. However, whereas previously we had asked many questions on energy use behaviors and attitudes, this year we structured the survey to focus on communication approaches and messages that motivate residential customers.

Awareness of Energy Trust continues to rise: in 2012, 61% of survey respondents had heard of Energy Trust, up from 56% in 2011. Awareness remains highest in the Portland Metro area and among PGE and NW Natural customers. A substantial increase was seen this year in Southern Oregon (58% in 2012 compared to 41% in 2011), where residents are served by Pacific Power. This increase may be the result of advertising by Pacific Power and Energy Trust as well as Energy Trust representatives living and working in that region. East of the Cascades, awareness is at 58%, up from 45% last year.

At least 21% of all respondents reported that they had received an incentive from Energy Trust or used one of our services, such as participating in a Home Energy Review or ordering an Energy Saver Kit.

In addition, opinions about Energy Trust were very favorable among both those that reported previous participation with Energy Trust and those who did not. Energy Trust was also the most commonly named organization that respondents would recommend to others as a source of information on conserving energy and reducing energy costs.

When asked what information respondents would most value receiving from Energy Trust, the majority said detailed information on incentives or general information and suggestions to save energy and money. Respondents indicated they would be interested in getting this information either directly from Energy Trust or through their local utility, reinforcing the benefit of utilizing both communication channels.

As in 2011, this year's survey was fielded using a mixed mode approach of both phone and web-based surveys. Due to the very small response to the postcard invitations to the

2011 web survey, this year a different methodology was used: respondents were invited, via phone rather than postal mail, to take the survey online, and callbacks were made to those who did not respond to the web survey. The web-based survey option was included because of its potential advantages in terms of cost, convenience to the respondent, and the ability to ask questions with visual elements. However, only 31% of 2012 surveys were completed online, with many respondents requesting to take the survey by phone. With the relatively small number of web respondents both this year and last, even with a significant change in survey methodology, the assumed advantages of a web-based survey were not borne out for the most part and Energy Trust may opt to return to a purely phone-based survey next year.

## Sampling Methodology

A total of 847 surveys were completed during the months of May and June, delivering an overall 95% confidence level of +/- 3.5. The target population was adult heads-of-households currently residing in the target geographical areas served by Energy Trust and who were served by one of the four Energy Trust's utility partners. The goal was to get a representative geographical sample from all regions served by Energy Trust. Following is a breakdown of respondents by utility service.

<b>Electric Utility</b>	<b>% of Total Surveys</b>
PGE	48.2%
Pacific Power	35.1%
EWEB	6.0%
Other	6.5%
Don't know/not sure	4.3%

<b>Gas Utility</b>	<b>% of Total Surveys</b>
NW Natural	39.3%
Cascade Natural Gas	3.3%
Avista	5.5%
Don't use natural gas	43.6%
Don't know/not sure	7.7%

A total of 586 surveys were completed via telephone (69.2% of total research sample). A total of 261 surveys were completed through a web survey (30.8% of total research sample). Following is the recruiting methodology utilized to contact, screen and complete all surveys.

1. Individuals were randomly recruited to participate in an online survey through an outbound telephone recruiting campaign which covered both landline (80%) and cell phone (20%) numbers
2. Those individuals who passed a brief telephone screener were asked for their email address and a special invitation was sent to them asking them to complete the online survey. This invitation process ensured that no one completed the survey more than once, meeting CAN-SPAM opt-in email regulations, and better control the quality of survey respondents.
3. If the potential respondents did not complete the online survey through the email invitation they were contacted again via telephone to encourage them to participate.
4. People contacted who did not have an email address, or who preferred to respond by phone, were invited to complete the survey via telephone.
5. To encourage as many as possible to participate, participants completing the survey were entered into a drawing for \$100 (odds of winning - 1/100).



## **Sampling methods for telephone screening and online surveys**

The sampling plan for each of the survey options were as follows:

**Heads-of-Household as the target population:** Heads-of-household were the preferred survey target because they could answer for their household's behavior as well as their own. The target population was defined to include all adult heads-of-household currently residing in the target geographic area and who are customers of at least one of the utilities EnergyTrust serves (Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas).

**Random sampling of landline populations:** Random sampling allowed the extrapolation of survey findings to the target population. Random recruiting of survey participants was conducted using a form of random digit dialing. Residential prefix numbers known to cover households within the targeted geographic area were attached to randomly generated suffix numbers. This provided coverage of both listed and unlisted landline numbers. Interviewers asked for the adult male or female head-of-household with only one person in the household being interviewed. (80% of those called were from this sample population)

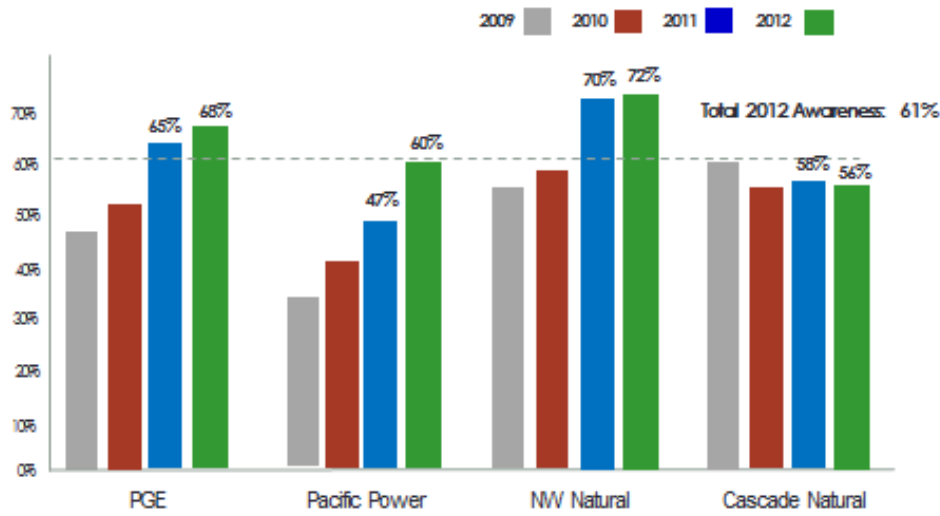
**Cellular Phone Surveying:** Including cellular phone only residents in this survey required us to use a listed sample, from which we randomly recruited participants to provide us with their email addresses so they can participate in the online survey. (20% of those called will be of this sample population)

**Adjustment for discrepancies between sample and population using weighting:** During field work, we stratified the sample in context to the regional segments to provide accurate awareness comparisons to previous year's studies.

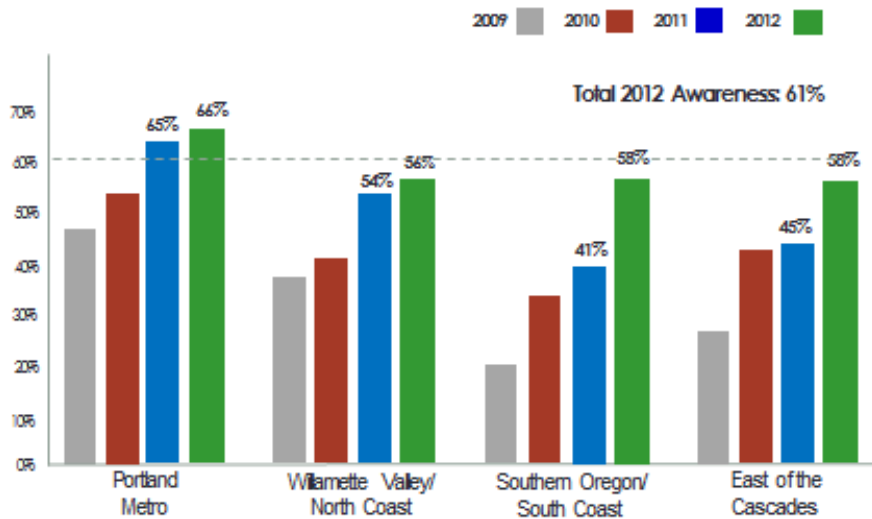
## Detailed Findings

Following are the detailed findings from all survey respondents who participated in the Energy Trust 2012 Residential Awareness and Perceptions Research Study. Please note that findings that are “bolded” reflect significant differences in responses at the 95% confidence level.

### Awareness of Energy Trust by Utility



### Awareness of Energy Trust by Region



**Current Attitudes about energy conservation**

2012 survey respondents reported being average to above average in their interest in taking actions to conserve energy and reduce their energy costs. Respondents who had previously received Energy Trust services reported being more interested in taking energy conservation actions than respondents who had not previously received Energy Trust services.

Current attitudes about conserving energy/reducing energy costs	Total sample	Have used Energy Trust	Have not used Energy Trust
I think I am more interested and take more actions to conserve energy and reduce energy costs than most people	41.9%	<b>55.4%</b>	<b>38.4%</b>
I think I am about average with most people in thinking about and taking actions to conserve the use of energy and reduce energy costs	54.3%	<b>44.6%</b>	<b>56.8%</b>
I think I am less interested in and take fewer actions than most people when it comes to conserving the use of energy and reducing energy costs	3.8%	-	4.8%

**Shifts in interest about conserving energy and reducing energy costs**

Nearly all survey respondents reported that their interest in conserving energy and reducing energy costs had increased or stayed the same over the previous 12 – 18 months, regardless of whether they had previously used Energy Trust services or not.

Shifts in interest in conserving energy/reducing energy cost past 12 – 18 months	Total sample	Have used Energy Trust	Have not used Energy Trust
My interest has <u>increased</u>	42.4%	38.3%	43.5%
My interest has <u>stayed the same</u>	55.0%	60.6%	53.6%
My interest has <u>decreased</u>	2.5%	1.1%	2.8%

### **Awareness of the Energy Trust logo**

Over 50% of all survey respondents completing the web survey reported having seen the Energy Trust logo.

<b>Aided awareness of Energy Trust logo</b>	<b>% of respondents</b>
Yes	52.1%
No	27.6%
Don't know/not sure	20.3%

### **Actions planned to reduce energy use**

Survey respondents reported that installing compact fluorescent light bulbs was the most frequent action they had taken in the past 12 months to reduce home energy use, with over 50% of participants reporting taking this action. It was also the most frequently mentioned action they were planning on taking in the next 12 months to reduce home energy use.

<b>Actions to reduce home energy use</b>	<b>Total survey sample actions taken in past 12 months % and total response</b>	<b>Total survey sample actions planned to take in next 12 months % and total response</b>
Installing compact fluorescent light bulbs	51.9% - 440	13.9% - 118
Replacing a clothes washer	16.5% - 140	9.3% - 79
Replacing refrigerator or freezer	14.4% - 122	11.5% - 97
Replacing a water heater	14.2% - 120	8.4% - 71
Recycling an old or extra refrigerator	13.5% - 114	10.7% - 91
Replacing windows	13.5% - 114	10.6% - 90
Adding insulation	11.0% - 93	11.3% - 96
Replacing a furnace	9.3% - 79	4.8% - 41
Conducting an energy audit	8.5% - 72	13.6% - 115
Adding/improving duct insulation	7.8% - 78	6.5% - 55
Replacing a heat pump	5.1% - 43	2.5% - 21
Adding a solar electric system	2.0% - 17	6.5% - 55
Adding a solar water heating system	0.9% - 8	4.1% - 35
<b>% of respondents with 0 actions</b>	<b>30%</b>	<b>49%</b>
<b>% of respondents with 1 action</b>	<b>30%</b>	<b>22%</b>
<b>% of respondents with 2+ actions</b>	<b>40%</b>	<b>29%</b>

**Actions planned to reduce energy use (continued)**

A comparison in responses from survey respondents who reported previously using Energy Trust services in the past 12 months vs. respondents who had not used Energy Trust services in the past 12 months shows that Energy Trust users installed more compact fluorescent light bulbs and conducted more energy audits than respondents that did not use Energy Trust services.

Actions to reduce home energy use	Respondents who have used Energy Trust services	Respondents who have not used Energy Trust services
Installing compact fluorescent light bulbs	<b>20.6%</b>	<b>12.2%</b>
Replacing a clothes washer	8.0%	9.7%
Replacing refrigerator or freezer	15.4%	10.4%
Replacing a water heater	9.1%	8.2%
Recycling an old or extra refrigerator	13.1%	10.1%
Replacing windows	12.0%	10.3%
Adding insulation	13.7%	10.7%
Replacing a furnace	4.6%	4.9%
Conducting an energy audit*	<b>18.9%</b>	<b>12.2%</b>
Adding/improving duct insulation	7.4%	3.1%
Replacing a heat pump	-	2.5%
Adding a solar electric system	4.6%	4.0%
Adding a solar water heating system	8.6%	6.0%

\*Specific type of audit not identified

### How first learned about Energy Trust

A significant portion of respondents who reported being aware of Energy Trust and had previously received Energy Trust services reported first learning about it from their gas and/or electric utility. A significant portion of respondents who were aware of Energy Trust and had not received Energy Trust services reported first learning of it through news media and advertising.

How first learned of Energy Trust	Total sample aware of Energy Trust	Have used Energy Trust services	Haven't used Energy Trust services
Through news media stories	21.2%	<b>11.4%</b>	<b>26.1%</b>
Through advertising	20.4%	17.1%	22.0%
From my gas and/or electric utility	16.0%	<b>28.6%</b>	<b>9.6%</b>
From a friend or acquaintance	11.0%	8.6%	12.2%
From a contractor or retailer	7.9%	<b>14.9%</b>	<b>4.3%</b>
Through research and investigation	5.25	<b>8.6%</b>	<b>3.5%</b>

### Have received services and incentives from Energy Trust

Over one third of survey respondents who reported being aware of Energy Trust reported receiving incentives from it in the past. Homeowners who reported being aware of Energy Trust were much more likely to have received services or incentives from non-homeowners were.

Have received services or incentives	Total sample aware of Energy Trust	Own home	Don't own home
Yes	33.7%	<b>37.7%</b>	<b>15.4%</b>
No	57.7%	<b>53.8%</b>	<b>74.7%</b>
Don't know/not sure	8.7%	19.4%	20.6%

### Receiving information from Energy Trust

Over 40% of survey respondents aware of Energy Trust reported receiving information from it in the past 12 months. A significantly larger percentage of respondents who had received Energy Trust services in the past 12 months reported receiving information than those who had not received Energy Trust services.

Have received information from Energy Trust in past 12 months	Total sample aware of Energy Trust	Have received Energy Trust services	Have not received Energy Trust services
Yes	42.3%	<b>64.0%</b>	<b>31.3%</b>
No	37.5%	<b>16.6%</b>	<b>48.1%</b>
Don't know/not sure	20.2%	19.4%	20.6%

**Information known about Energy Trust**

Following is a summary of the most frequently given responses by survey respondents to the question “What if anything, do you know about Energy Trust, what it does and how it operates”. This question was asked only of respondents who had reported hearing of Energy Trust.

From people who have received services/incentives	From people who have not received services/incentives
They do energy audits	Don't know very much
They facilitate rebates	I know they are a power company
They offer cash incentives	Recommends ways to conserve energy and save money
Formed in 94/95 and funded by all utilities in Oregon	They help homeowners with energy use
They do something with appliance credits	I have heard them mentioned on TV
Rebates for appliances	I know very little about them
They receive funding from utility companies	I don't know much about them
Concerned about saving energy and money now and in the future	An alternative source of energy
They help reduce energy consumption	Can help with energy incentives
Supported by energy utilities	I have heard about it but don't know how they operate
Rebates on energy compliant appliances	I can't tell you much. They are a non-profit organization

**Most recommended organizations from which to learn about energy conservation & reducing energy costs**

Survey respondents were asked to recommend the “top three” organizations they would recommend to someone who was looking for information on ways to conserve energy and reduce energy costs. Energy Trust was reported as the most preferred source to get information from on ways to conserve energy and reduce energy cost, with over half of respondents reported it as their top choice. *This question was asked very early in the survey to measure top-of-mind awareness of Energy Trust before a series of questions were asked specifically about Energy Trust.*

Recommended organizations	Mean priority 1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> choice	% reporting 1 <sup>st</sup> choice (of those recommending specific organization)
Energy Trust	1.65	56.8%
Pacific Power	1.74	46.2%
PGE	1.82	42.4%
NW Natural	2.03	27.2%
Oregon Dept. of Energy	2.06	28.5%
Avista	2.07	20.3%
Cascade Natural Gas	2.17	20.7%
Clean Energy Works Oregon	2.23	21.9%

**Reasons for recommending Energy Trust**

Following is a summary of the most frequently given responses by survey respondents to the question “What is your main reason for recommending Energy Trust?”. This question was asked only of respondents who had reported hearing of Energy Trust.

From people who have received services/incentives	From people who have not received services/incentives
Previous good experience	It is a reputable organization
Because they have resources to help people save money	I have heard good things about them
They have good information and advice	They are trustworthy
Good information and they offer rebates	They can conserve energy and lower bills
They provided a free energy audit	It is unbiased and they don't try to sell you anything
They are active and involved in conserving energy	They will give good honest advice
They have information on how to save energy	They are knowledgeable
Great information on rebates and tax credit programs	I have seen ads on how to reduce energy use
They are kind of an education operation. They are looking at the financial side of the house.	They seem to be consistent with actively helping you conserve energy.



### Awareness of Energy Trust services

Survey respondents who reported being both aware of Energy Trust and having received Energy Trust services were significantly more aware of Energy Trust services when presented to them than those respondents who were aware of Energy Trust but had never received any of its services.

Energy Trust services aware of	Total sample aware of Energy Trust (% and total response)	Have used Energy Trust Services (% and total response)	Haven't used Energy Trust Services (% and total response)
Offers cash incentives to have old refrigerators or freezers recycled	60.4% - 314	<b>77.7% - 136</b>	<b>51.6% - 178</b>
Offers cash incentives to residents who purchase more energy efficient refrigerators, freezers and clothes washers	60.2% - 313	<b>87.4% - 153</b>	<b>46.4% - 160</b>
Provides energy saver kits that contain light bulbs, a shower head and other water saving devices.	59.2% - 303	<b>81.1% - 142</b>	<b>48.1% - 166</b>
Provides home energy audits	58.7% - 305	<b>80.0% - 140</b>	<b>47.8% - 165</b>
Offers cash incentives to residents who install more energy efficient heating and cooling systems	58.5% - 304	<b>84.0% - 147</b>	<b>45.5% - 157</b>
Offers cash incentives to residents who install insulation or seal air leaks	49.0% - 255	<b>71.4% - 125</b>	<b>37.7% - 130</b>
Offers cash incentives to residents who install solar electric systems or solar hot water systems	46.0% - 239	<b>64.0% - 112</b>	<b>36.8% - 127</b>

### Use of Energy Trust services

Survey respondents reported that receiving an Energy Saver Kit and purchasing an efficient appliance from Energy Trust were the top two services received from Energy Trust.

Services received from Energy Trust	Total sample aware of Energy Trust
Received an Energy Saver kits that contains light bulbs, a shower head and other water saving devices	34.6%
Purchased an efficient appliance and received a check from Energy Trust	23.1%
Recycled an old refrigerator or freezer and received a check from Energy Trust	16.3%
Received a home energy audit from Energy Trust	13.8%
Installed an efficient heating or cooling system or water heater and received a check from Energy Trust	11.5%
Installed insulation or sealed air leaks and received a check from Energy Trust	6.7%
Installed a solar electric system or solar hot water system and received a check from Energy Trust	1.5%

### **Response to Energy Trust attributes**

Survey respondents were asked to respond to the following three statements and report how strongly they agreed with the statements on a 1 – 5 scale, where one meant strongly disagree and 5 meant strongly agree with the statement. All respondents aware of Energy Trust reported strong agreement to all three Energy Trust attributes presented to them. Respondents who had received Energy Trust services in the past reported significantly higher scores than the total sample of respondents aware of Energy Trust.

<b>Energy Trust Attributes</b>	<b>Total sample aware of Energy Trust mean score (1 – 5)</b>	<b>Received Energy Trust services mean score (1 – 5)</b>	<b>Total sample aware of Energy Trust Service (% 4 &amp; 5)</b>	<b>Total sample used Energy Trust services (% 4 &amp; 5)</b>
Energy Trust is a credible information source for Oregon residents to learn about energy efficiency and renewable energy	<b>4.14</b>	<b>4.57</b>	<b>70.6%</b>	<b>92.6%</b>
Energy Trust serves the residents of Oregon well in their efforts to increase energy efficiency and reduce energy consumption	<b>3.97</b>	<b>4.64</b>	<b>63.3%</b>	<b>88.6%</b>
Energy Trust is a leader in energy efficiency and renewable energy	<b>3.85</b>	<b>4.20</b>	<b>56.4%</b>	<b>77.2%</b>

### **Messaging to motivate energy conservation actions**

Survey respondents were asked to rate each of the following three statements on how effective each was in convincing them to pursue an energy-saving or renewable project in the future on a 1 – 5 scale, where 1 meant being very ineffective and 5 being very effective. “You can save energy and money” was identified as the most preferred statement with nearly 80% of respondents giving it a score of 4 or 5.

<b>Messaging options</b>	<b>Total sample mean score (1 – 5)</b>	<b>Total sample (% 4 &amp; 5)</b>
You can save energy and money	4.24	79.3%
Enjoy a comfortable and more energy efficient home	4.00	69.0%
Save energy and the planet	3.96	56.4%

**Desired information to help determine how to use less energy (past Energy Trust users)**

Survey respondents who had already received Energy Trust services reported that receiving rebate/cash incentive information and/or general and specific information on possible “next actions to take” were the most preferred ways Energy Trust could help them identify additional energy-savings actions.

Information that Energy Trust could provide to help residents determine how to use even less energy	Respondents who received Energy Trust services
Provide detailed information about rebates and cash incentives I might qualify for	26.3%
Provide general information and suggestions to me on ways to reduce home energy use and save money	17.1%
Recommend a specific “next step” I might take to reduce home energy use and save money	15.4%
Provide an on-line questionnaire that I could complete to help me understand how energy efficient my home currently is	11.4%
Provide information about how to finance my energy efficiency improvement	7.4%
Provide referrals to contractors who are skilled in completing energy efficiency projects	6.9%
Energy audit	1.7%

**Desired information to help determine how to use less energy (non-Energy Trust users)**

Survey respondents who reported that they had not received Energy Trust services in the past indicated that receiving rebate and cash incentive information as well as general information on ways to reduce home energy use were the types of information they would like to receive from Energy Trust.

Information that Energy Trust could provide to help residents determine how to use even less energy	Respondents who had not received Energy Trust services
Provide detailed information about rebates and cash incentives I might qualify for	25.7%
Provide general information and suggestions to me on ways to reduce home energy use and save money	25.1%
Provide an on-line questionnaire that I could complete to help me understand how energy efficient my home currently is	14.9%
Recommend a specific “next step” I might take to reduce home energy use and save money	14.3%
Provide information about how to finance my energy efficiency improvement	6.0%
Provide referrals to contractors who are skilled in completing energy efficiency projects	4.2%
Information for renters	1.5%

**Interest in getting information from Energy Trust on ways to conserve energy (non-Energy Trust Users)**

Approximately 50% of survey respondents who reported not being Energy Trust users reported being interested in getting information on ways Energy Trust could help them conserve energy and reduce energy costs. Respondents that did not own their own home reported being statistically more interested in getting energy conservation information than homeowners.

Would like information from Energy Trust	Total survey sample Non-Energy Trust users	Own home	Don't own home
Yes	49.9%	46.6%	56.8%
No	42.1%	45.2%	35.3%
Don't know/not sure	8.0%	8.2%	7.9%

**Desired way to receive additional energy savings information**

Survey respondents who had already received Energy Trust services reported a slight preference to receive additional energy savings information directly from Energy Trust, although the majority of respondents reported being comfortable in getting information from either Energy Trust or their local electric and/or gas utility.

Desired way to receive additional suggestions on ways to reduce energy use ENERGY TRUST USERS	Have used Energy Trust
From my local electric and/or gas utility or Energy Trust	55.4%
Directly from Energy Trust	28.6%
From my local electric and/or gas utility	9.1%
Other	1.1%
Don't know/not sure	5.7%

Survey respondents who had never received Energy Trust services also reported a slight preference to receive energy saving information directly from Energy Trust but reported being comfortable in getting information from either Energy Trust or their local electric and/or gas utility.

Desired way to receive additional suggestions on ways to reduce energy use NON-ENERGY TRUST USERS	Non-Energy Trust users
Directly from Energy Trust	26.3%
From my local electric and/or gas utility	14.9%

Either source would be fine

55.5%

### **Use of compact fluorescent light bulbs**

Over 80% of all survey respondents reported having compact fluorescent light bulbs (CFLs) in their home. The majority of respondents reported having multiple compact fluorescent light bulbs.

Have CFLs or “twisty bulbs” in home	Total survey sample	Have received Energy Trust services	Have not received Energy Trust services
Yes	84.1%	94.9%	81.3%
No	13.7%	4.6%	16.1%
Don't know/not sure	2.2%	0.6%	2.7%

Number of “twisty bulbs” in home	Total survey sample	Have received Energy Trust services	Have not received Energy Trust services
Have 1 – 5 bulbs	32.0%	21.1%	35.3%
Have 6 – 10 bulbs	32.6%	28.9%	33.7%
Have 11 – 20 bulbs	25.3%	34.3%	22.5%
Have more than 20 bulbs	9.4%	14.5%	7.9%

### **Use of LED light bulbs**

Approximately 20% of all survey respondents reported replacing any incandescent light bulbs or CFLs with LED light bulbs.

Have installed LED light bulbs	Total survey sample	Have received Energy Trust services	Have not received Energy Trust services
Yes	19.1%	21.7%	18.5%
No	75.0%	74.9%	75.0%
Don't know/not sure	5.9%	3.4%	6.5%

## **Survey Participation Information**

Following is a summary of demographic and home ownership information obtained from survey respondents.

<b>Respondent Age</b>	<b>% of Total</b>
18 – 34	9.6%
35 – 54	27.9%
55 and older	59.4%
Refused	3.2%

<b>Home Status</b>	<b>% of Total</b>
Own home	75.1%
Rent home	24.1%
Don't know/refused	.8%

<b>Year home built</b>	<b>% of Total</b>
Before 1970	36.0%
1970 - 1979	17.5%
1980 – 1986	5.5%
1987 - 1992	7.6%
1993 - 2000	11.0%
After 2000	10.6%
Don't know/ not sure	11.8%

<b>Type of home</b>	<b>% of Total</b>
Single-Family Detached	67.8%
Apartment/Condo with 5+ units	12.2%
Manufactured/Mobile Home	10.9%
Duplex, Triplex, Fourplex	4.3%
Single-Family Attached	2.1%
Other	2.7%

Primary source of energy for <u>space heating</u>	% of Total	Energy Trust users	Non-Energy Trust users
Natural Gas	42.4%	60.6%	37.6%
Electricity	42.0%	27.4%	45.8%
Wood	9.7%	6.9%	10.4%
Other	5.9%	4.0%	6.2%

Primary source of energy for <u>water heating</u>	% of Total	Energy Trust users	Non-Energy Trust users
Electricity	58.6%	46.3%	61.8%
Natural Gas	36.5%	50.3%	32.9%
Other	4.9%	4.0%	6.2%

Living space square footage	% of Total
Fewer than 500 Sq. Ft.	4.3%
500 – 999 Sq. Ft.	15.2%
1,000 – 1,499 Sq. Ft.	23.5%
1,500 – 1,999 Sq. Ft.	24.2%
2,000 – 2,499 Sq. Ft.	11.3%
2,500 – 2,999 Sq. Ft.	6.5%
More than 3,000 Sq. Ft.	6.9%

Length of time in current residence	% of Total
Less than a year	6.5%
1 – 2 years	11.5%
3 – 5 years	16.8%
6 – 10 years	17.7%
More than 10 years	46.8%
Don't know/not sure	0.8%

Annual Household Income	% of Total
Less than \$10,000	9.3%
\$10,000 - \$29,000	16.8%
\$30,000 – \$49,000	19.7%
\$50,000 - \$69,000	13.1%
\$70,000 - \$89,000	7.8%
\$90,000 - \$109,000	8.4%
\$110,000 - \$149,000	4.7%
\$150,000 - \$199,000	3.1%
\$200,000 or more	1.4%



## **2012 Oregon Residential Awareness & Perceptions Study Survey Questionnaire**

### **INTRODUCTION**

Thank you for your willingness to participate in the 2012 Oregon Awareness and Perceptions of Home Energy Use Study. Your insights will be very helpful to Oregon's energy suppliers in designing and delivering programs that help maintain affordable energy costs.

Please be assured that your responses will be 100% confidential and released only as summaries in which answers are anonymous.

Upon your completion of the survey, you will be entered into a drawing to win \$100....

### **SCREENING QUESTIONS**

- S1. Are you one of the persons who are responsible for making decisions about energy use in your household such as paying your utility bill or buying new appliances?
- a. Yes (continue with screener)
  - b. No (ask to talk to decision maker or end survey)
- S2. Are you or anyone else in your household, an employee of an electric or gas utility?
- a. Yes (end survey)
  - b. No (continue survey)
- S3. What is the name of your electric utility?
- a. PGE (Portland General Electric)
  - b. Pacific Power (Pacific Power, PP&L, PacificCorp)
  - c. EWEB (Eugene Water & Electric Board)
  - d. Other (SPECIFY) \_\_\_\_\_
  - e. Don't know
- S4. What is the name of your gas utility?
- a. NW Natural
  - b. Cascade Natural Gas
  - c. Avista
  - d. DO NOT USE NATURAL GAS
  - e. Don't know
- S5. Do you rent or own your home?
- a. Own
  - b. Rent?
  - c. Don't know

S6. What year were you born?

**QUESTIONNAIRE**

Q1. Generally speaking, which of the following statements would best describe your current attitude about conserving energy and reducing energy costs in your home?

- a. I think I am more interested and take more actions to conserve energy and reduce energy costs than most people.
- b. I think I am about average with most people in thinking about and taking actions to conserve the use of energy and reduce energy costs.
- c. I think I am less interested in and take fewer actions than most people when it comes to conserving the use of energy and reducing energy costs.

Q2. Which of the following statements best describes how your interest in conserving energy and reducing energy costs has changed over the last 12 – 18 months?

- a. My interest has decreased
- b. My interest has stayed the same
- c. My interest has increased

Q3. Suppose that a friend asked you to recommend an organization that could give them information about ways to conserve energy and reduce energy costs. Please select up to three organizations from the following list that you would recommend that they contact. **(ROTATE LIST, HAVE THEM SELECT 1<sup>ST</sup> CHOICE, 2<sup>ND</sup> CHOICE AND 3<sup>RD</sup> CHOICE)**

- a. NW Natural
- b. Cascade Natural Gas
- c. Avista
- d. PGE, Portland General Electric
- e. Pacific Power (Pacific Power, PP&L, PacificCorp)
- f. Energy Trust of Oregon
- g. Clean Energy Works Oregon
- h. Oregon Department of Energy
- i. Other (specify) \_\_\_\_\_

**Continue to Q4 if they selected Energy Trust in Q3**

**Continue to Q5 if they did not select Energy Trust in Q3**

Q4. What is your main reason for recommending that they contact Energy Trust? **(OPEN END)**

**Continue to Q6**

Q5. Have you heard of Energy Trust of Oregon?

- a. Yes
- b. No

- c. Don't know/not sure
- Q6. Have you seen this logo prior to today?

**ENERGY TRUST LOGO SHOWN**

- a. Yes
- b. No
- c. Don't know/not sure

**Continue to Q7 if they have heard of Energy Trust in Q5**

**Continue to Q14 if they have not heard of Energy Trust in Q5**

- Q7. What, if anything, do you know about Energy Trust, what it does and how it operates? **(OPEN END)**

- Q8. How did you first hear about Energy Trust? **(ROTATE LIST)**

- a. From friend of acquaintance
- b. From a contractor or retailer
- c. From my gas and/or electric utility
- d. Through advertising
- e. Through news media/stories
- f. Through my research and investigation
- g. Other (specify) \_\_\_\_\_

- Q9. Have you ever received any services or incentives from Energy Trust?

- a. Yes
- b. No
- c. Don't know/not sure

- Q10. Which of the following services are you aware that Energy Trust provides to Oregon residents?

**(Yes, No, Don't know/not sure)**

**(ROTATE LIST)**

- a. Provides home energy audits (also known as "home energy reviews")
- b. Offers cash incentives to residents who purchase more energy efficient refrigerators, freezers and clothes washers
- c. Offers cash incentives to residents who install more energy efficient heating and cooling systems
- d. Offers cash incentives to residents who install insulation or seal air leaks
- e. Offers cash incentives to residents who install solar electric systems or solar hot water systems
- f. Offers cash incentives to have old refrigerators or freezers recycled
- g. Provides energy saver kits that contain light bulbs, a shower head and other water saving devices

Q11. Have you ever.... **(ROTATE LIST)**

**(Yes, No, Don't know not sure)**

- a. Received a home energy audit from Energy Trust (also called a "home energy review")?
- b. Purchased an efficient appliance such as a clothes washer or refrigerator and received a check from Energy Trust?
- c. Installed an efficient heating or cooling system or a water heater and received a check from Energy Trust?
- d. Installed insulation or sealed air leaks and received a check from Energy Trust?
- e. Installed a solar electric system or solar hot water system and received a check from Energy Trust?
- f. Recycled an old refrigerator or freezer and received a check from Energy Trust?
- g. Received an energy saver kit from Energy Trust that contains light bulbs, a shower head and other water saving devices?

Q12. Please let us know how strongly you agree or disagree with each of the following statements on a scale of one to five, where one means strongly disagree and five means strongly agree?

**(ROTATE LIST)**

- a. Energy Trust is a leader in energy efficiency and renewable energy
- b. Energy Trust is a credible information source for Oregon residents to learn about energy efficiency and renewable energy
- c. Energy Trust serves the residents of Oregon well in their efforts to increase energy efficiency and reduce energy consumption

Q13. Have you received any information or communication about Energy Trust in the past 12 months, either from Energy Trust directly or from your local electricity and/or gas utility?

- a. Yes
- b. No
- c. Don't know/not sure

**ACTIONS/ATTITUDES CONCERNING HOME ENERGY CONSERVATION**

Q14. We are very interested in understanding what actions you have taken and/or are planning to take to reduce home energy use. For each of the following please check all that apply

	<b>We have completed in the last 12 months</b>	<b>We are planning on completing in the next 12 months</b>
Conducting an energy audit		
Replacing a furnace		
Replacing a heat pump		
Adding insulation		
Replacing windows		
Replacing a water heater		
Adding/improving duct insulation		
Replacing a clothes washer		
Replacing a refrigerator or freezer		
Recycling an old or extra refrigerator		
Adding a solar electric system		
Adding a solar water heating system		
Installing compact fluorescent light bulbs		
Other (please specify)		

Q15. Do you have any types of compact fluorescents light bulbs also called “twisty bulbs” like these in your home?

**SHOW PICTURE OF LIGHT BULBS**

- a. Yes
- b. No
- c. Don't know/not sure

**CONTINUE TO Q16 IF ANSWER IS YES**

**CONTINUE TO Q17 IF ANSWER IS NO**

Q16. Approximately how many of these bulbs do you have installed in your home?

- a. 1 – 5
- b. 6 – 10
- c. 11 – 20
- d. More than 20
- e. Don't know/not sure

Q17. Have you replaced any incandescent light bulbs or CFLs with LED light bulbs like these?

**SHOW PICTURE OF LIGHT BULBS**

- a. Yes
- b. No
- c. Don't know/not sure

Q18. Please rate the following statements on how effective each is in convincing you to pursue an energy-saving or renewable project such as adding insulation or purchasing energy efficient appliances. Please rate each on a 1 – 5 scale with 1 being very ineffective and 5 being very effective?

**(ROTATE LIST)**

- a. Enjoy a comfortable and more energy efficient home
- b. Save energy and the planet
- c. You can save energy and money

**Energy Trust of Oregon is an independent nonprofit organization dedicated to helping utility customers benefit from saving energy and generating renewable energy. Its services, cash incentives and solutions have helped participating customers of Portland General Electric, Pacific Power, NW Natural and Cascade Natural Gas save \$1 billion dollars on their energy bills. Its work helps keep energy costs as low as possible, create jobs and build a sustainable energy future.**

Q19. You have indicated that you have received services from Energy Trust in the past. Energy Trust is interested in continuing to help residents like you further conserve energy and reduce energy costs. What is the most valuable information that Energy Trust could provide to help you determine how to use even less energy?

**(SELECT ONE) (ROTATE)**

- a. Provide general information and suggestions to me on ways to reduce home energy use and save money
- b. Provide an on-line questionnaire that I could complete to help me understand how energy efficient my home currently is
- c. Provide referrals to contractors that are skilled in completing energy efficiency projects
- d. Provide information about how to finance my energy efficiency improvement
- e. Provide detailed information about rebates and cash incentives I might qualify for
- f. Recommend a specific "next step" I might take to reduce home energy use and save money
- g. Other (Specify)
- h. None of the above

Q20. How would you like to get this information?

- a. Directly from Energy Trust
- b. From my local electricity and/or gas utility
- c. Either source would be fine
- d. Other
- e. Don't know/not sure

**CONTINUE TO Q24**

Q21. Based on the description of Energy Trust, would you be interested in learning more about how it can help you conserve energy and reduce energy costs?

- a. Yes
- b. No
- c. Don't know/not sure

**Continue to Q22 if they answered yes to Q21**

**Continue to Q24 if they answered no to Q21**

Q22. Energy Trust is interested in helping residents like you conserve energy and reduce energy costs. What is the most valuable information that Energy Trust could provide to help you determine how to use less energy?

**(SELECT ONE)**

- a. Provide general information and suggestions to me on ways to reduce home energy use and save money
- b. Provide an on-line questionnaire that I could complete to help me understand how energy efficient my home currently is
- c. Provide referrals to contractors that are skilled in completing energy efficiency projects
- d. Provide detailed information about rebates and cash incentives I might qualify for
- e. Provide information about how to finance my energy efficiency improvement
- f. Recommend a specific "next step" I might take to reduce home energy use and save money
- g. Other (Specify)
- h. None of the above

Q23. How would you like to get this information?

- a. Directly from Energy Trust
- b. From my local electricity and/or gas utility
- c. Either source would be fine
- d. Don't know/not sure

## Housing and Demographic Information

- Q24. What year was your home built?
- Before 1970
  - 1970 – 1979
  - 1980 – 1986
  - 1987 – 1992
  - 1993 – 2000
  - After 2000
  - Don't know/not sure
- Q25. What is your home's primary source of energy for space heating?
- Electricity
  - Natural gas
  - Liquid propane gas (LPG)
  - Fuel oil (kerosene)
  - Solar
  - Wood
  - Other \_\_\_\_\_
  - Don't know/not sure
- Q26. What is your home's primary source of energy for water heating?
- Electricity
  - Natural gas
  - Liquid propane gas (LPG)
  - Fuel oil (kerosene)
  - Solar
  - Wood
  - Other \_\_\_\_\_
  - Don't know/not sure
- Q27. What type of home do you live in?
- Single-family detached house
  - Single-family attached house (such as a townhouse)
  - Duplex, triplex or fourplex
  - Apartment or Condominium with 5 units or more
  - Manufactured or Mobile home
  - Other
  - Don't know/not sure
- Q28. Which of the following best describes the square footage of the living area (heated area) of your home?
- Fewer than 500 square feet
  - 500 to less than 1,000 square feet
  - 1,000 to less than 1,500 square feet



- d. 1,500 to less than 2,000 square feet
- e. 2,000 to less than 2,500 square feet
- f. 2,500 to less than 3,000 square feet
- g. More than 3,000 square feet
- h. Don't know/not sure

Q29. How long have you lived in your current home?

- a. Less than a year
- b. 1 – 2 years
- c. 3 – 5 years
- d. 6 – 10 years
- e. More than 10 years
- f. Don't know/not sure

Q30. What is your household's total annual income before taxes?

- a. Less than \$10,000
- b. \$10,000 - \$29,000
- c. \$30,000 – \$49,000
- d. \$50,000 – \$69,000
- e. \$70,000 - \$89,000
- f. \$90,000 – 109,000
- g. \$110,000 - \$149,000
- h. \$150,000 - \$199,000
- i. \$200,000 or more
- j. Don't know/not sure