Energy Trust of Oregon
2008 Residential Awareness and Perception Study

EnergyTrust of Oregon, Inc.™

Presentation to Conservation Advisory Council

December 3, 2008

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Study Purpose

- Understand ETO customers' general level of interest and awareness regarding energy efficiency, renewable energy, climate change, and etc.;
- Help design ETO's marketing and implementation of existing/future programs and campaign;
- Serve as a benchmark for future tracking surveys.

- Sample of 1,000 from random digit dialing; additional 204 renters from list
- Sample weighted to be representative of Oregon population
- Question Areas:
  - ETO awareness and participation
  - Use of energy
  - Impressions of energy efficient/renewable energy products
  - Global warming beliefs
  - Purchasing plans

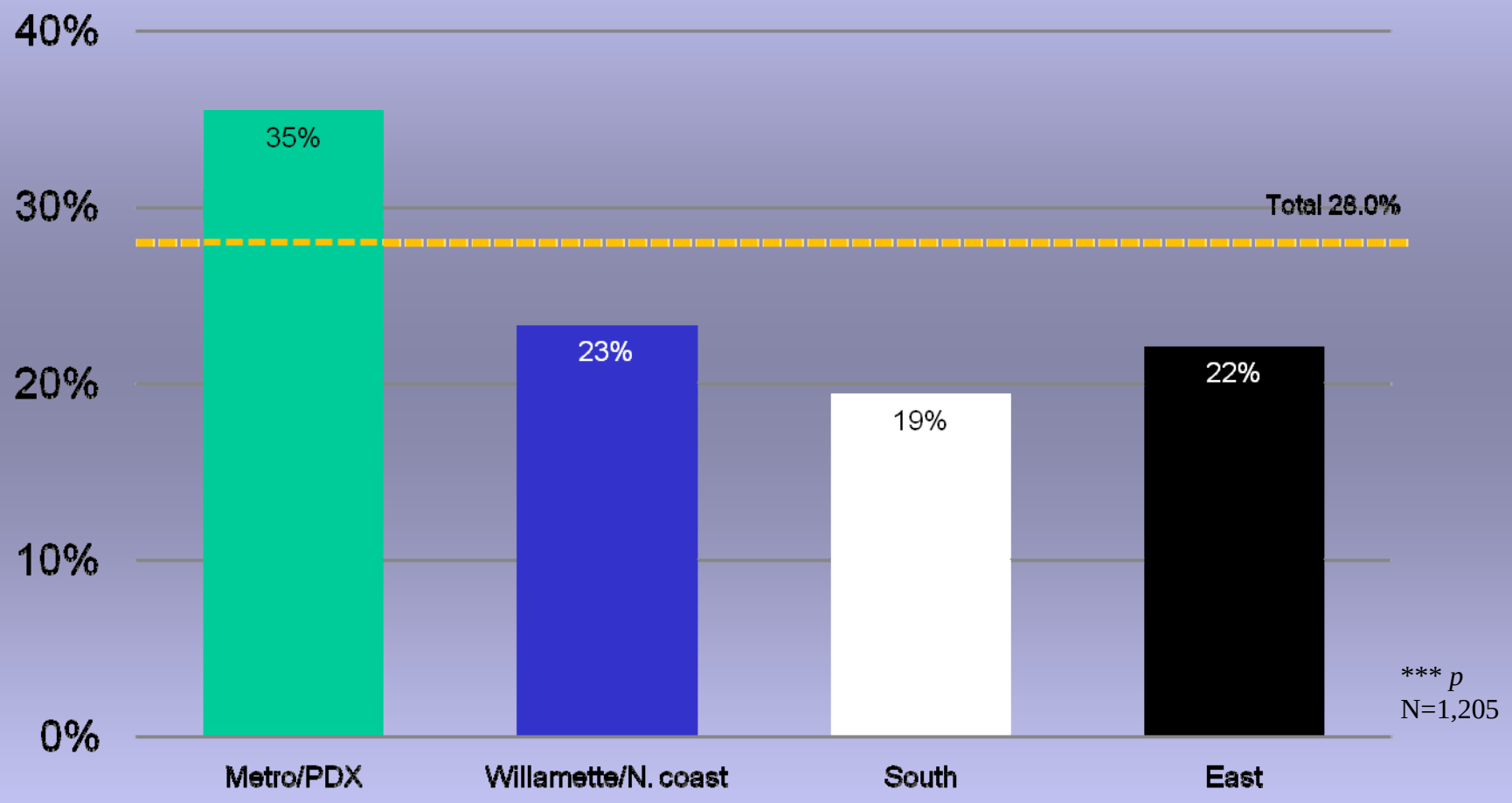
Key Findings

- ETO awareness concentrated in Metro/PDX region, PGE customers.
- Most commonly heard about ETO from utility bill inserts and other direct mails.
- Participants tend to be homeowners in single-family houses, middle aged, have higher education level and household income, and gas space heat.
- Participants have installed efficient measures, but conservation behaviors are not different from nonparticipants.
- Nonparticipants appear to be trying to reduce energy use by conservation measures, not able to employ efficiency measures primarily due to cost barrier.
- Nonparticipants hold slightly more skeptical views toward “energy efficient” products in cost, availability, and comfort.

Key Findings, continued

- More people in Metro and Willamette/Coast regions believe Global Warming is real compared to South and Eastern Oregon.
- No difference in belief of global warming between participants and nonparticipants.
- More than half of nonparticipants' primary news source is TV. Participants rely more on paper media and public radio.
- Half of the participants intend to participate in ETO programs in next 12 months; about a quarter of nonparticipants intend to participate in ETO programs in the next year.
- Very few differences by region.

ETO Awareness by Region



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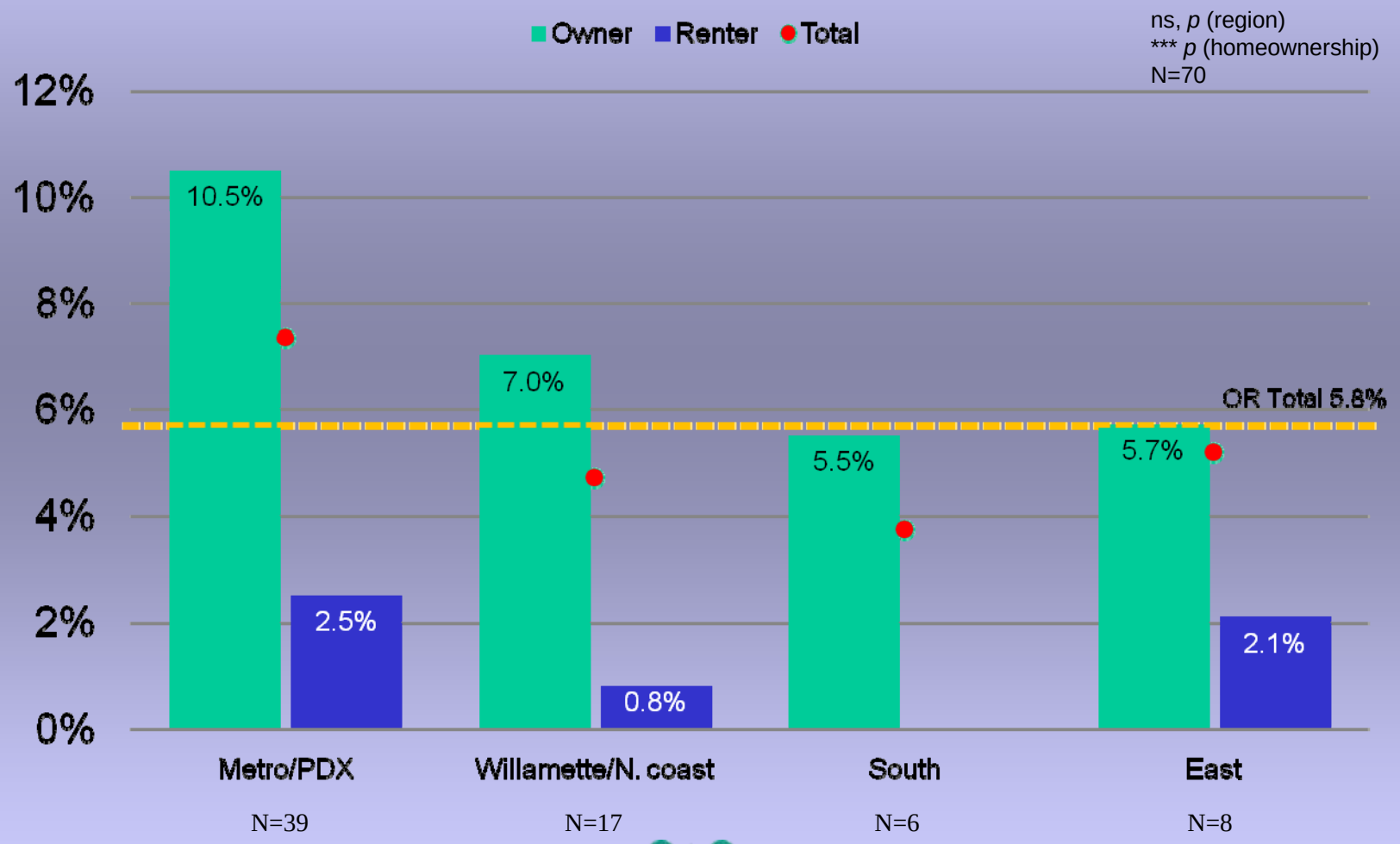
ETO Participation by Region



Note: ns denotes no significant difference observed.

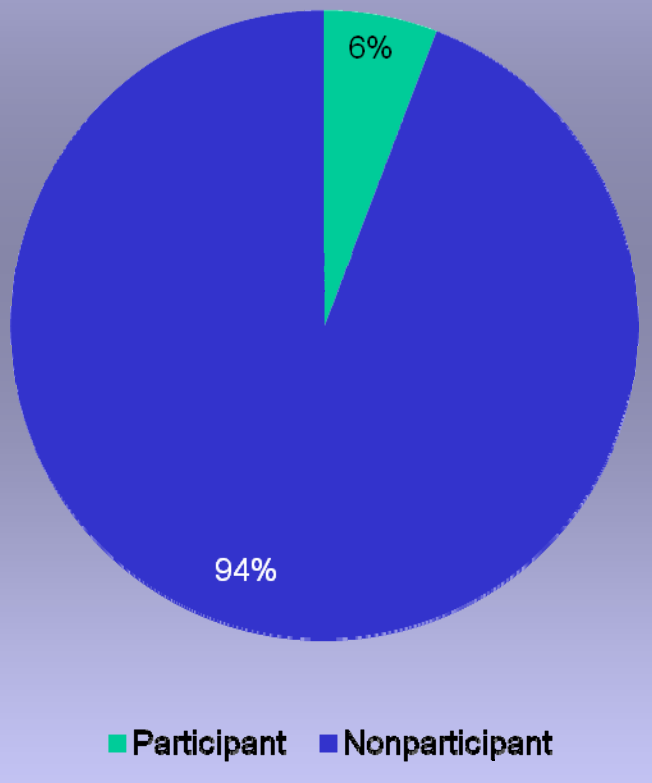
ETO Awareness and Participation

- Of home owners in our service territory, 38% had heard of us, 10% had participated.
  - Of single family home owners in our service territory, the numbers are 39% and 11%.

- Of renters in our service territory, 20% have heard of us, 2% had participated.
  - Of single family renters in our service territory, the numbers are 27% and 5%.

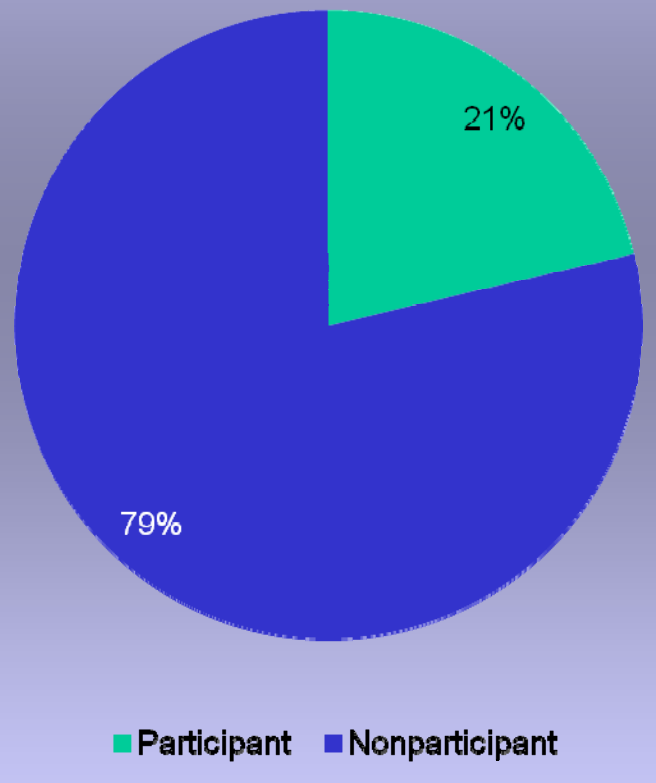
ETO Participation Rate

Of all the respondents



N=1,195

Of those aware of ETO



N=328

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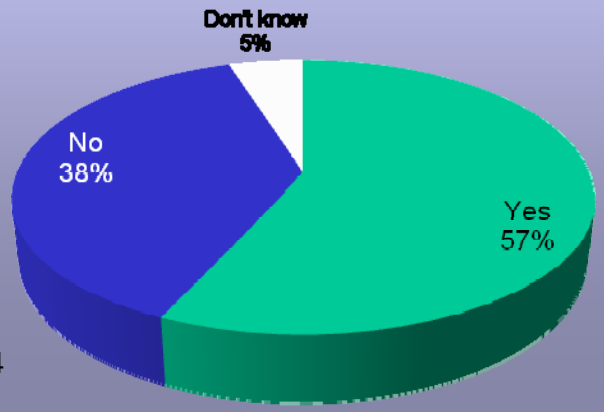
Note: Those respondents who said have participated in ETO only before 2004 (5 years or more ago) were not counted as ETO participant.

Use of Energy

	Participant	Nonparticipant	Sig. (*p*)
How concerned about your home's energy bill? (10-point)	**8.2**	6.8	***
% of time you turn the lights off when leaving a room?	79.9%	**85.2%**	*
% of time you do laundry with washer fully loaded?	83.6%	**86.2%**	ns
% of time you leave your computer on/sleep mode?	49.4%	**37.9%**	*
% of time you try to buy energy efficient appliances/electronics?	**87.8%**	74.8%	**
Ever had a home energy audit/review? (yes)	**34.3%**	13.7%	***
Has filter for heating system been changed since January? (yes)	**69.6%**	54%	**
Have a plasma TV larger than 42 inches? (yes)	13%	**3.2%**	***
Have CFL or twisty/swirly bulbs in your home? (yes)	**91.3%**	78.6%	**

CFL Ownership

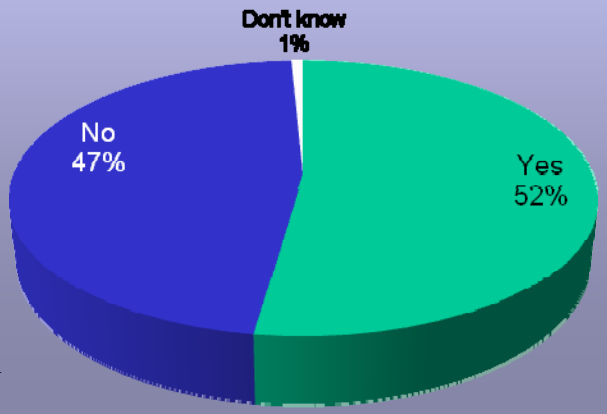
Do you have CFL in your home?



N=1,204

+

Do you have twisty/swirly-type bulbs?

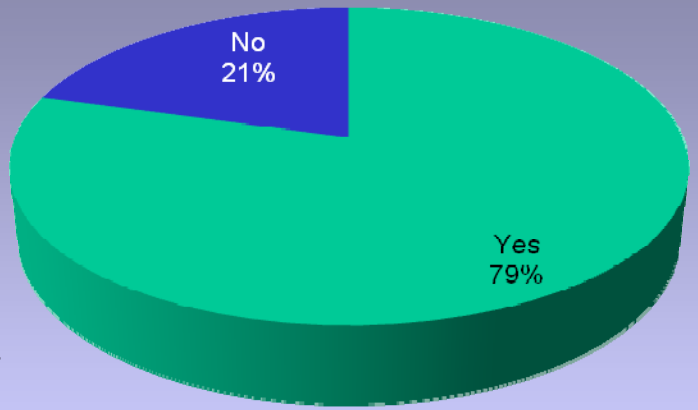


N=521

* Asked if they said no/don't know to CFL possession.

=

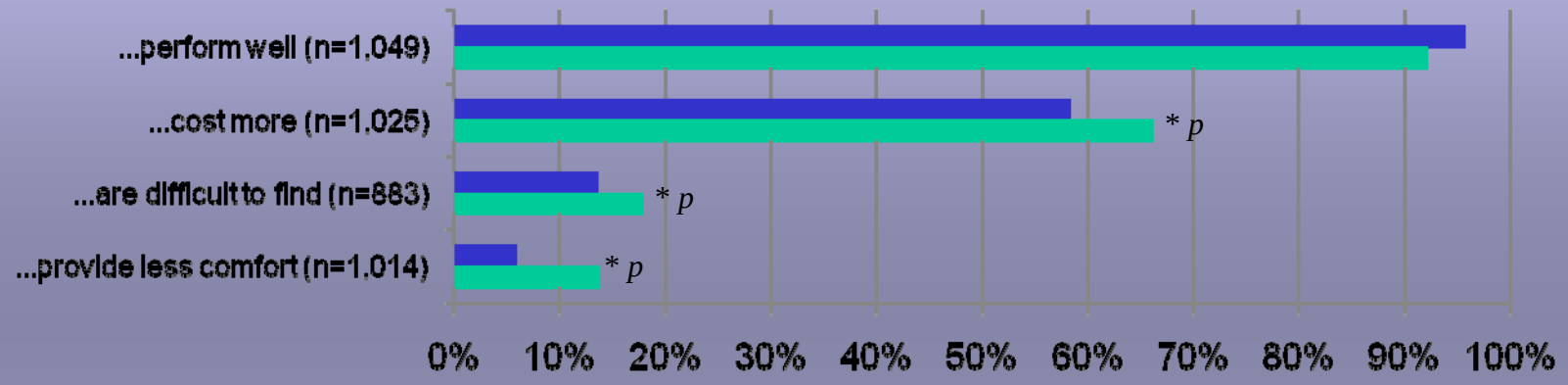
Total CFL owned



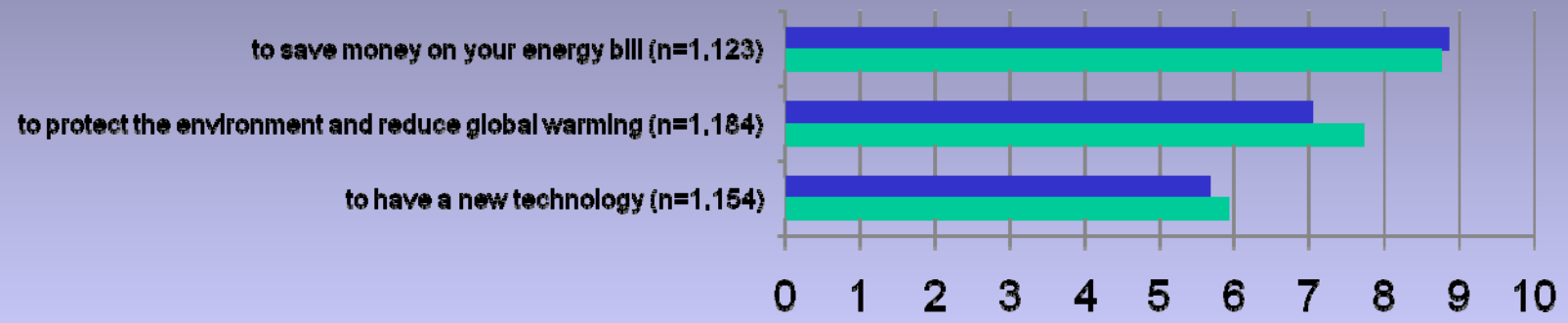
N=1,204

Energy Efficiency/Renewable Impression

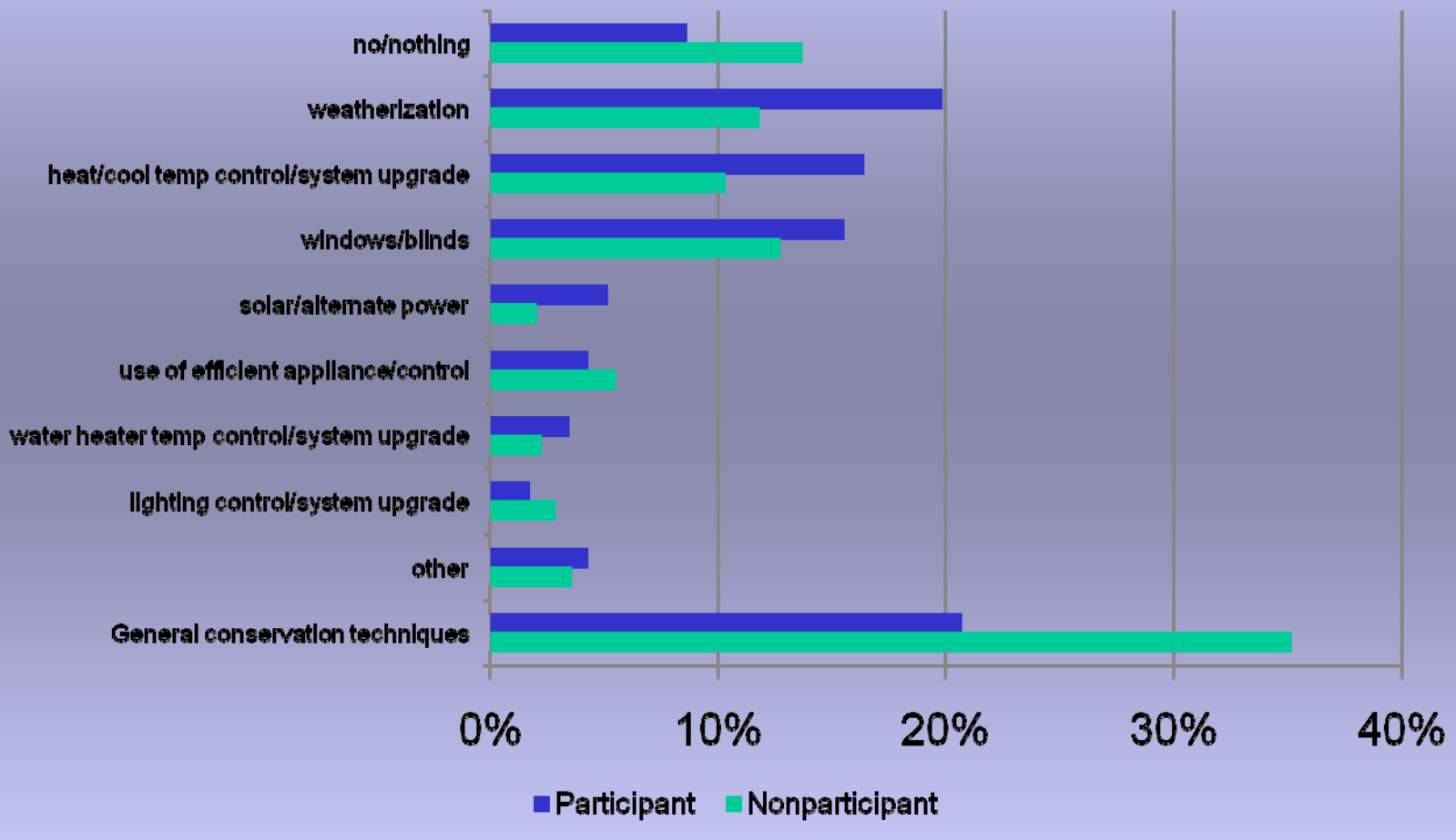
Energy efficient products, compared with standard products,...



In energy efficient product purchase decision, how important each of the following reasons be? (10-point scale)



Other Activities to Reduce Energy Use



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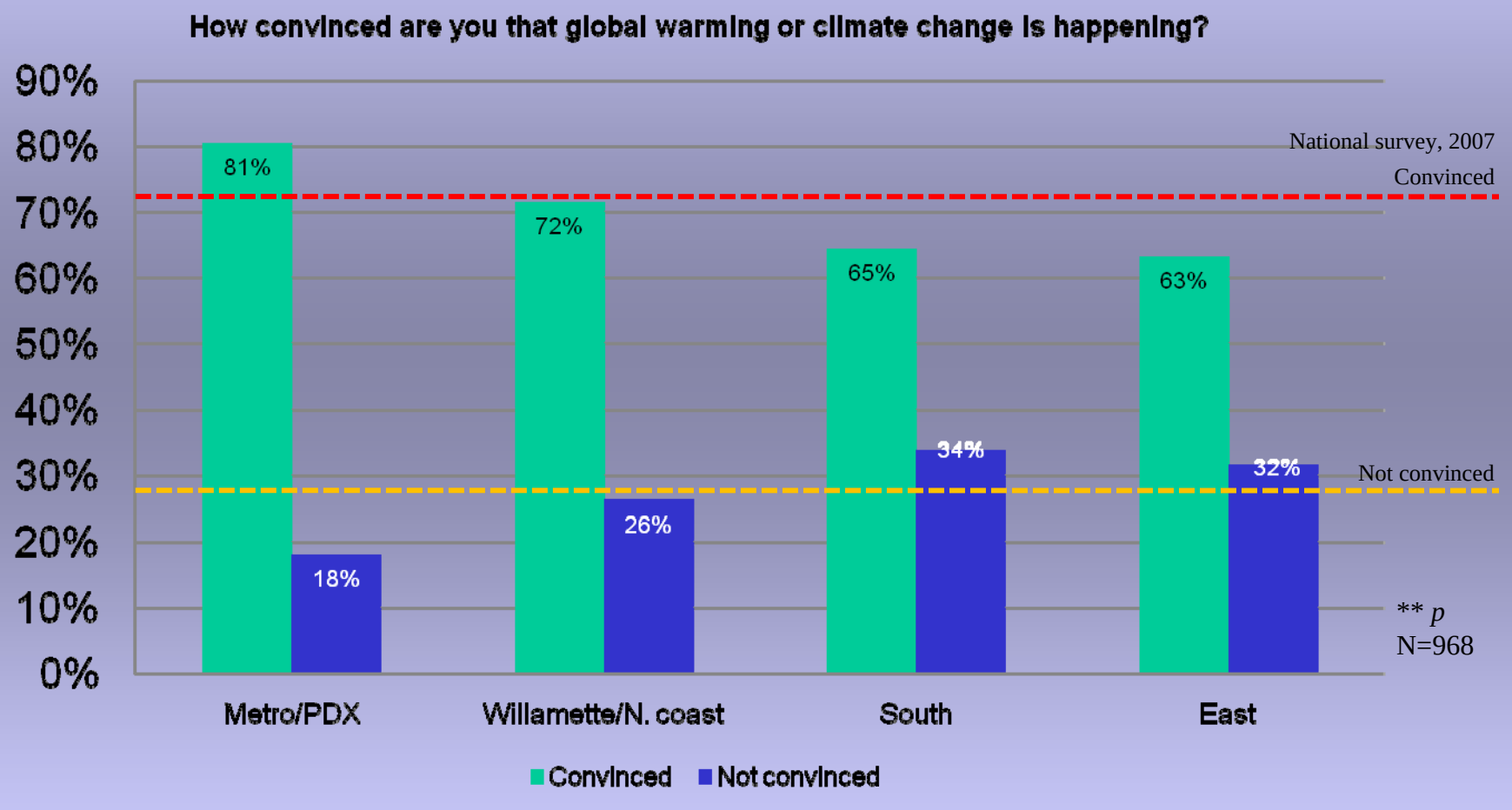
Note: The total number of responses (not number of respondents) were used for denominator. Total number of responses=1,616.

Global Warming/Ecological Belief



No significant difference between participants and nonparticipants.

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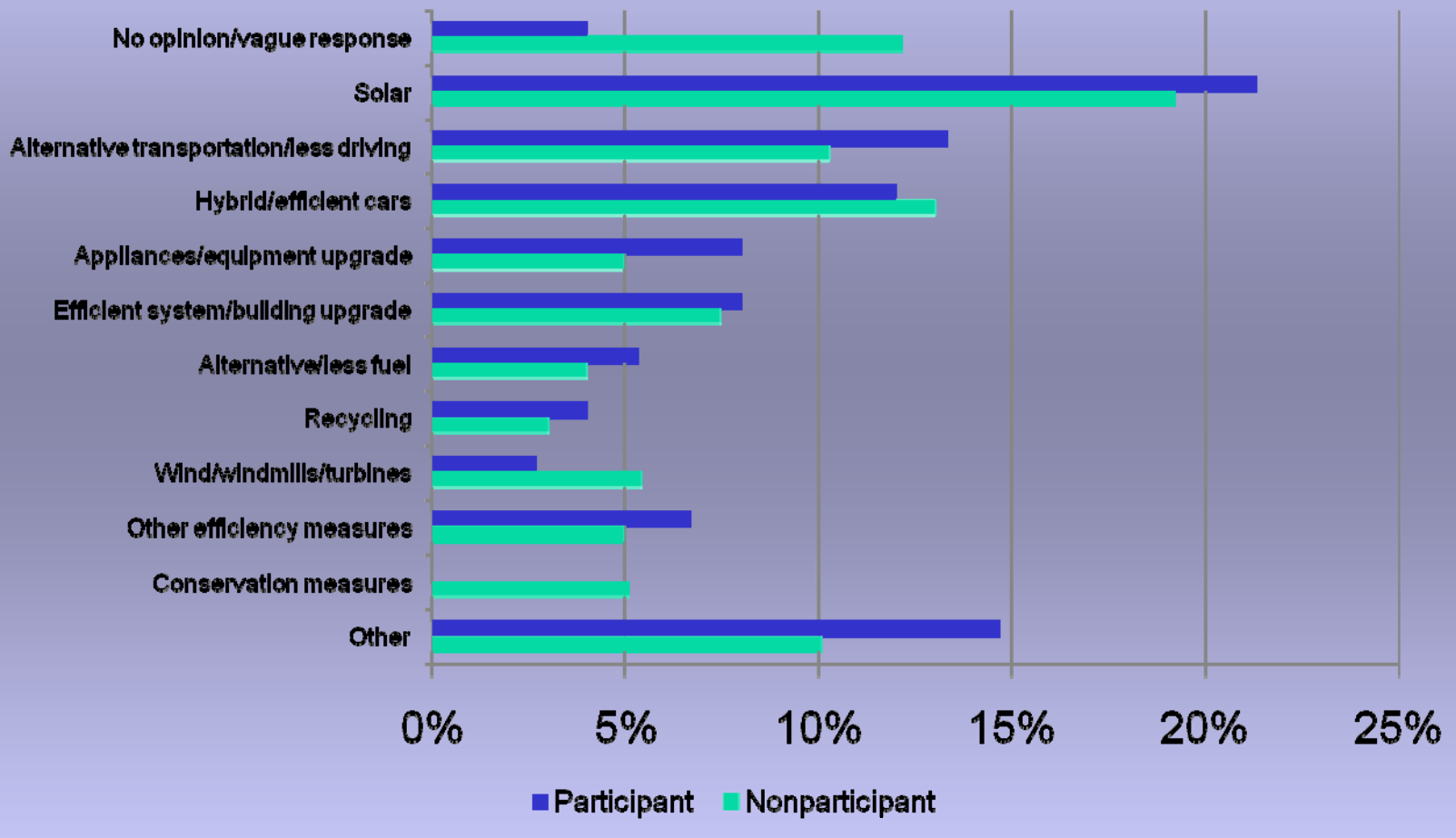
Note: In order to rescale this survey data to the scale used in the national survey, "somewhat convinced" (middle point) in this survey was treated as missing (n=235). 'Completely convinced' and 'Mostly convinced' were combined in "convinced" bins, and 'Not so convinced' and 'not at all convinced' were combined in "not convinced" bins. American Opinions on Global Warming, http://www.populationmedia.org/wp-content/uploads/2008/01/americansglobalwarmingreport.pdf

Advice you would give to reduce contribution to global warming



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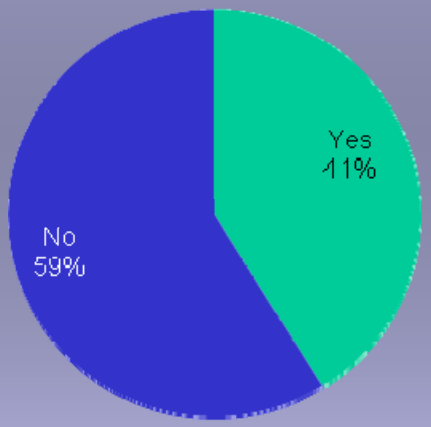
Note: The total number of responses (not number of respondents) were used for denominator. Total number of responses=995.

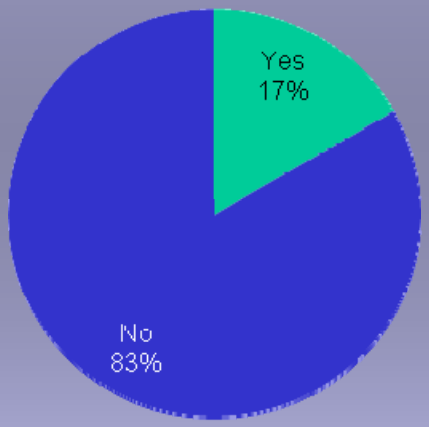
Purchasing

Do you ask about energy bill/saving features, when you consider a new home/condo?



N=1,173

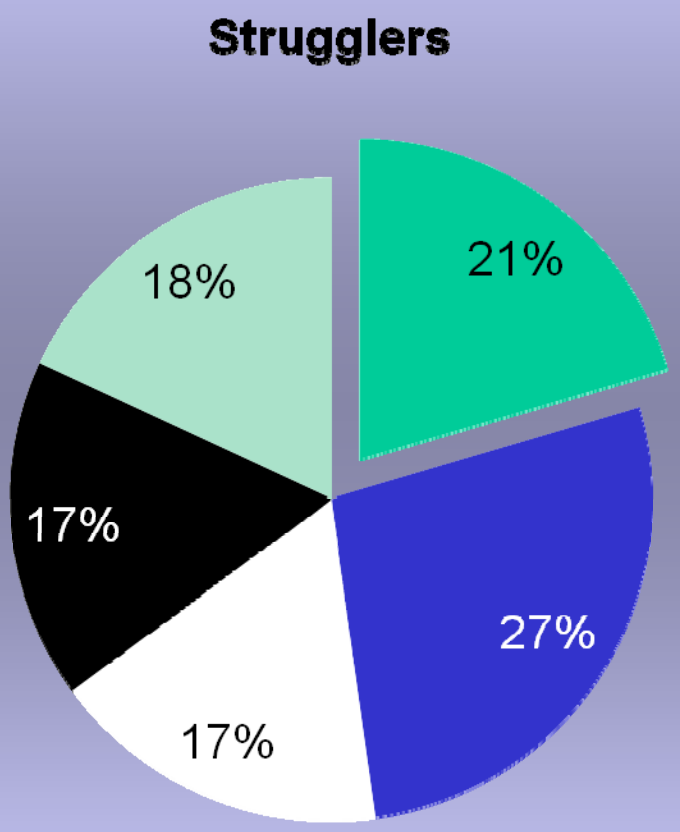
Planning to replace any major appliances in the next 12 months?



N=1,192

Note: Responses other than “yes” or “no” were treated missing.

Struggler Profile



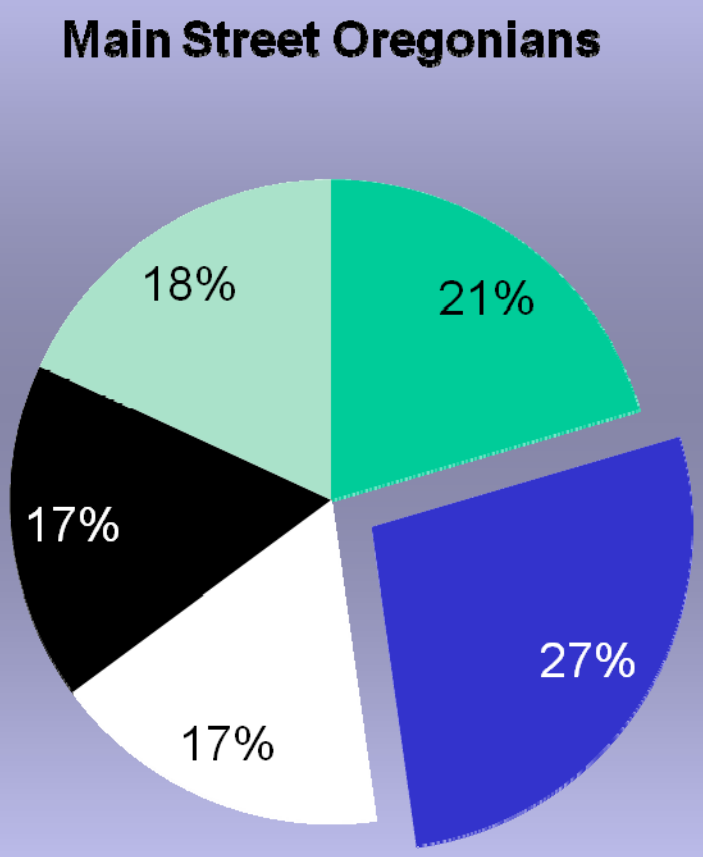
Behavioral variables

- Low energy consumption
- No participation in ETO programs
- Least informed about general energy efficiency issues
- Need more CFLs

Demographic variables

- Renters
- Electricity for heating
- Low income
- Less educated
- Older householders
- Scattered across the state

Main Street Oregonian Profile



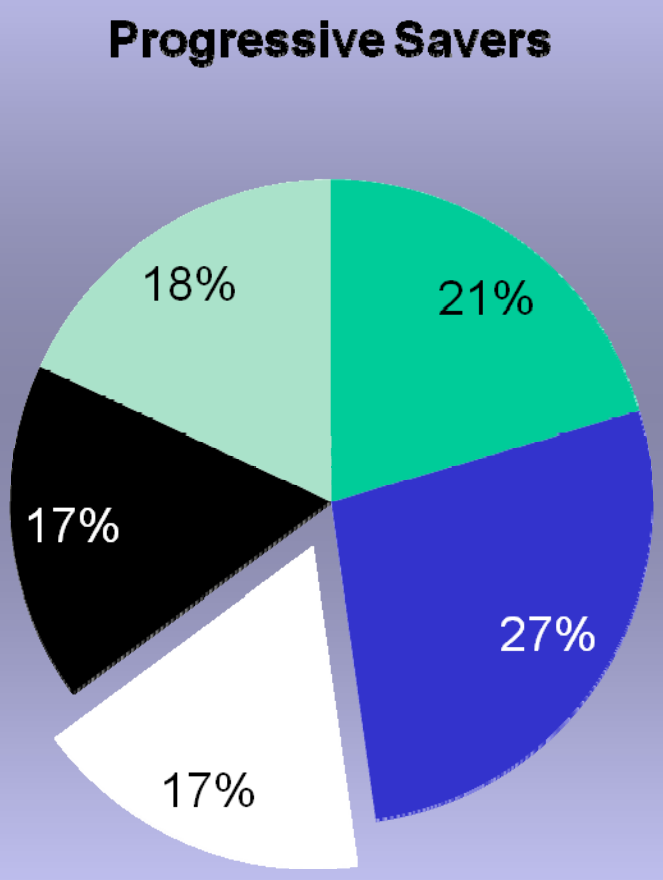
Behavioral variables

- Both low and high energy consumption
- Average information awareness level
- Some participation in ETO programs

Demographic variables

- Homeowners
- Electricity for heating
- Higher concentration in non-urban area, South in particular
- Middle income
- Varied education level
- Older householders

Progressive Saver Profile



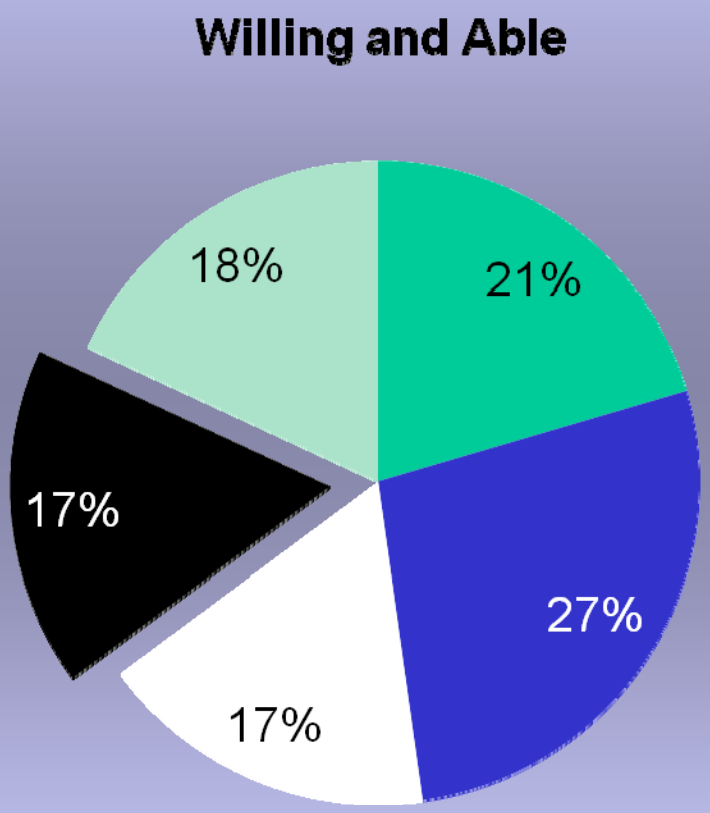
Behavioral variables

- Low energy consumption
- Most informed about general energy efficiency issues
- Low participation in ETO programs

Demographic variables

- Homeowners
- Natural gas for heating
- Middle income
- Varied level of education
- Younger householders

Willing and Able Profile



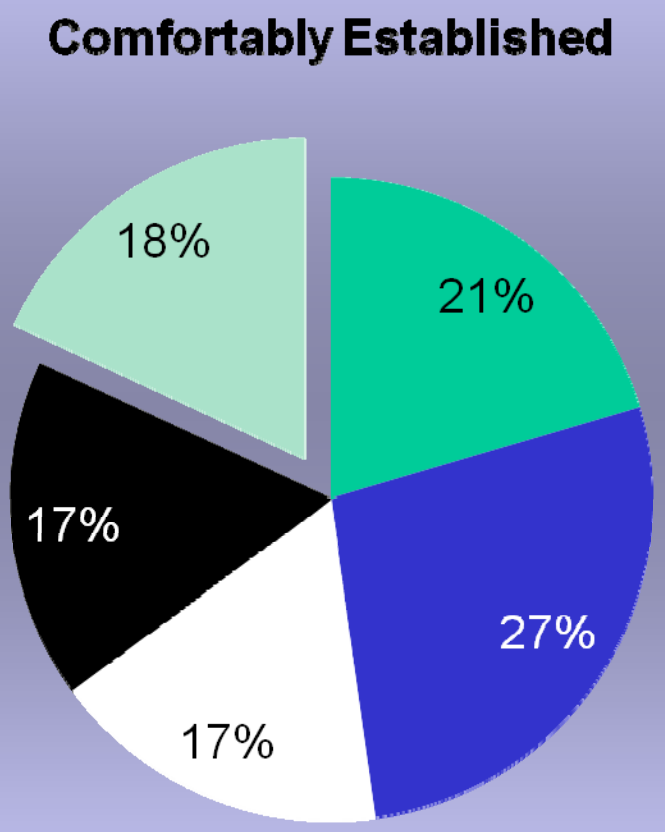
Behavioral variables

- Both low and high energy consumption
- Most informed about general energy efficiency issues
- High information awareness level

Demographic variables

- Mix of owners and renters
- Natural gas for heating
- Higher income
- Varied level of education
- Younger householders

Comfortably Established Profile



Behavioral variables

- Very high energy consumption
- Average information awareness level
- High participation in ETO programs

Demographic variables

- Mix of owners and renters
- Electricity for heating
- High income
- Well educated
- Older householders

Target Segment Selection

	Attractiveness	Targeting Implementation
Strugglers	Low	No, but send CFLs
Main Street Oregonians	High	Yes
Progressive Savers	Moderate	They will come
Willing and Able	High	Yes
Comfortably Established	High	Yes, hit hard!

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