# *Executive Summary*

# 2008 Oregon Residential Awareness and Perception Study

***Funded By:***

EnergyTrust of Oregon, Inc.™

***Submitted To:***

Sarah Castor
Philipp Degens, Ph.D.
**Energy Trust of Oregon, Inc.**

***Prepared By:***

research/into/action inc.

Jane S. Peters, Ph.D.
Marjorie McRae, Ph.D.
Jun Suzuki, MPA
Mersiha Spahic
**Research Into Action, Inc.**

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This report provides the results from the analysis of the 2008 Oregon Residential Awareness and Perception Study. In April 2008, Energy Trust of Oregon, Inc. (Energy Trust) commissioned a team of researchers, led by Research Into Action, Inc., to conduct the first residential research to gauge general awareness and perceptions of energy efficiency and renewable energy among Oregon residential households. A total of 1,205 interviews were completed by Research Into Action's subcontractor Abt SRBI, Inc. during July through September 2008. The goal of this report is to provide findings and recommendations useful to improving Energy Trust's marketing activities and energy-saving goals in the residential sector.

## SUMMARY OF FINDINGS

Based on response to the survey, we estimate that about 6% of Oregonians have participated in Energy Trust programs and about 28% of Oregonians are aware of Energy Trust, with 71% aware of the Oregon State Energy Tax Credit program. Participants expressed satisfaction with the program and over 60% have recommended participation to people outside of their household.

A variety of differences were found between participants in Energy Trust programs and those who have yet to participate. The following highlights some of the important findings:

### Energy Trust Awareness and Participation

- Households that are aware of Energy Trust are more highly concentrated in the Portland metropolitan region. Energy Trust awareness was significantly higher among PGE customers and lower among other utility customers, particularly those of EWEB.
- The most frequently cited medium through which households first learned about Energy Trust was from utility inserts and other direct mail.
- Households with electric providers other than PGE have significantly lower participation rates in Energy Trust programs.
- Characteristics associated with homeownership are common among participants: they are more likely to be single-family home dwellers, middle-aged primary householders, more educated, and have higher household income.
- Nonparticipants are more likely to live in non-single family dwellings, have less household income and education, to be either older or younger than average, and to use electricity for heating.
- Households that use natural gas as their primary energy source for heating are more likely to participate in Energy Trust programs.
- Participants seem to be highly satisfied with Energy Trust services.

## Attitudes, Belief, and Behaviors

- Participants are more motivated to reduce their energy bill by installing efficient measures compared with nonparticipants, but their conservation attitudes and behaviors are the same as or worse than nonparticipants'.
- Nonparticipants appear to be trying to reduce energy use by conservation actions, but not able to employ efficiency measures, primarily because of a cost barrier.
- Nonparticipants hold more skeptical views than participants do toward "energy-efficient" products in cost, availability, and comfort.
- More households in the Portland metropolitan and Willamette regions are convinced that Global Climate Change is real, compared to those that reside in the Southern or Eastern parts of the state. Oregon households, on average, hold about the same level of conviction as the national average. There appears to be no difference in the conviction that Global Warming is real between participants and nonparticipants.

## Green Power and Renewable Energy Option Programs

- Participation in Green Power programs ranges from 7% to 17%. Among EWEB customers, awareness of such a program is significantly lower than for other electric utilities.
- Participation and awareness among NW Natural customers of the renewable energy option program is very low.

## Market

- More than half of the nonparticipants' primary news source is television. Participants rely more on paper media and public radio.
- Half of the participants express the intention to participate in Energy Trust programs in the near future by doing more efficiency improvements to their homes, whereas less than a quarter of nonparticipants have the intention to do so.

## Energy Consumption

- Owner-occupied households have significantly more high energy consumers compared with renter-occupied households. Renter-occupied households use considerably less energy and this is consistent regardless of housing type.
- Regional differences in energy consumption of owner-occupied households are significant. The Portland metropolitan area and Willamette/North Coast regions have the highest concentration of high consumption owner-occupied households, and the Southern and Eastern regions have low concentrations of high consumption households.

- ➡ High consumption owner-occupied households are significantly more highly educated, with higher incomes.
- ➡ Very few differences in Energy Trust awareness and participation, energy use attitudes, perceptions, and behaviors were observed between low and high energy consumption households.

## CONCLUSIONS AND RECOMMENDATIONS

The main findings from the analysis suggest that Energy Trust has significant challenges, as well as opportunities for marketing and energy saving. The results suggest that the public is concerned about their energy use and the problem of Global Warming is becoming a more pressing issue to them. This signifies the importance of future efforts to inform the issue of energy efficiency and promote changes in their behaviors. In this light, we offer the following conclusions and recommendations:

***Conclusion 1:* Five distinct market segments have emerged, which may have important implications to Energy Trust marketing strategies.**

- ***Strugglers* (renter-occupied households) – have low to moderate market attractiveness**
- ***Progressive Savers* (low energy consumption lifestyle) – have low to moderate market attractiveness**
- ***Main Street Oregonians* – are one of the most attractive market segments**
- ***Willing and Able* – are one of the most attractive market segments**
- ***Comfortably Established* – are the most attractive market segment**

➡ ***Recommendation 1:* Give the highest priority to reach the *Comfortably Established*, and then *Main Street Oregonians* and *Willing and Able*. If resources allow, provide CFLs particularly to *Strugglers* to enhance knowledge and gain savings.**

***Conclusion 2:* The public is confused by terminologies commonly used in the energy efficiency industry.**

➡ ***Recommendation 2:* Prior to implementing future surveys, efforts should be made to test the terms used in the instruments that consumers use to describe energy efficiency, and energy conservation actions and behaviors. Brainstorm industry assumptions with focus groups to enhance survey effectiveness.**

***Conclusion 3:* The increasing use of cell phones as primary household phone lines challenges obtaining representative samples.**

➡ ***Recommendation 3:* Employ more rigorous sampling techniques by including sample quotas for demographic variables that are available in census data, such as for**

**householder's age and housing structure. Use of other advanced data collection technologies – such as web surveys or purchasing cell phone numbers – that allow for reaching cell phone-only households could be used in conjunction with traditional RDD techniques.**

***Conclusion 4:*** **A short survey is good for respondents, but not necessarily good for addressing every question.**

- ➡ ***Recommendation 4:*** **Continue to use respectful, short surveys, but limit questions on participation and focus on behavior, awareness, decision-making, and market barriers.**