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EnergyTrust of Oregon

# *MEMO*

**Date:** January 22, 2009
**To:** Board of Directors
**From:** Sarah Castor, Market Research and Evaluation Analyst
Brooke Graham, Residential Marketing Manager
**Subject:** Staff Response to the 2008 Oregon Residential Awareness and Perceptions Study

The 2008 Oregon Residential Awareness and Perceptions Study was a joint effort between Energy Trust's Marketing and Communications group and our Evaluation group. The purpose of the study was two-fold: 1) to gather information about the level of awareness Oregonians have of Energy Trust and 2) to better understand attitudes and behaviors surrounding the topics of energy efficiency, renewable energy and climate change. In the past, staff has attempted to some of this information through the survey portion of the Home Energy Solutions (HES) program evaluations and through an online Web site survey on our main residential page. However, these surveys were limited in that they were less comprehensive, only accommodated limited questions, and were not fully representative of the general population.

The 2008 Oregon Residential Awareness and Perceptions Study provides results based on a representative sample of both homeowners and renters from Energy Trust service territories throughout the state. We plan to repeat the survey on an annual basis to track changes in responses over time.

Of the population surveyed (approximately 1200), 28% were aware of Energy Trust and about 6% have participated in one of our programs. These figures are a few percentage points higher when the sample is limited to homeowners in our service territory. The highest awareness is concentrated mostly in the Portland Metro area, particularly among PGE customers. Awareness of Oregon Department of Energy Tax Credits, which have been in existence for approximately 30 years, was more than double the awareness of Energy Trust in our roughly 7 years.

From survey results, it is clear that Oregonians are concerned about their home's energy bills and believe that global warming is real. However, it does not appear that consumers currently associate energy efficiency as a high priority action to be taken in response to global warming. Energy Trust's challenge is to leverage concerns expressed about global warming and link them to awareness of energy efficiency and renewable energy as ways of reducing carbon emissions. Such connections in messaging could help leverage increased program participation among certain consumers.

To further focus on different consumer types, the survey responses identified five customer segments, three of which were recommended for targeting. Energy Trust marketing staff will develop marketing messages for the target segments and test them through focus groups or an additional survey. As part of the current survey, respondents were asked about willingness to participate in future surveys or focus groups and contact information was collected from those who were willing. This information has been paired with each respondent's customer type, enabling Energy Trust to quickly put together an interview or sample survey group.

The study also revealed that many Oregonians are unfamiliar with the term "CFL", even when they had installed such light bulbs in their home. This was equally true for all customer

segments. Through the same focus groups or an additional focus group, staff would like to further explore consumers' knowledge and use of energy terminology. This information would aid future survey development as well as communications with customers.

In the next survey, we plan to reduce the number of questions on past Energy Trust participation and develop more questions about factors which influence customer decision making about home upgrades and purchases. This will assist us in understanding and potentially helping remove barriers toward taking action.