2009 Oregon Residential Awareness Study

Board Meeting – February 3, 2010

research/into/action inc

EnergyTrust of Oregon

Study Purpose

- Understand our customers' general level of interest in/awareness of:
  - Energy Trust
  - energy efficiency
  - renewable energy
  - climate change
- Help design marketing and implementation of existing/future programs and campaigns
- Compare to last year's results, refine segmentation scheme

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Fielding

- Fielded in late May-June 2009
- Respondents representative of Oregon general population
  - Own vs. rent
  - Single family vs. multifamily
  - Respondent age
  - Region of residence
- 904 respondents
  - 694 (77%) were customers of one of our funding utilities

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Survey questions

- Energy Trust Awareness
  - Participation
- Assessment of their home's energy efficiency
- Attitudes and beliefs about energy
- Use of energy
- Interest in renewable energy
- Demographics

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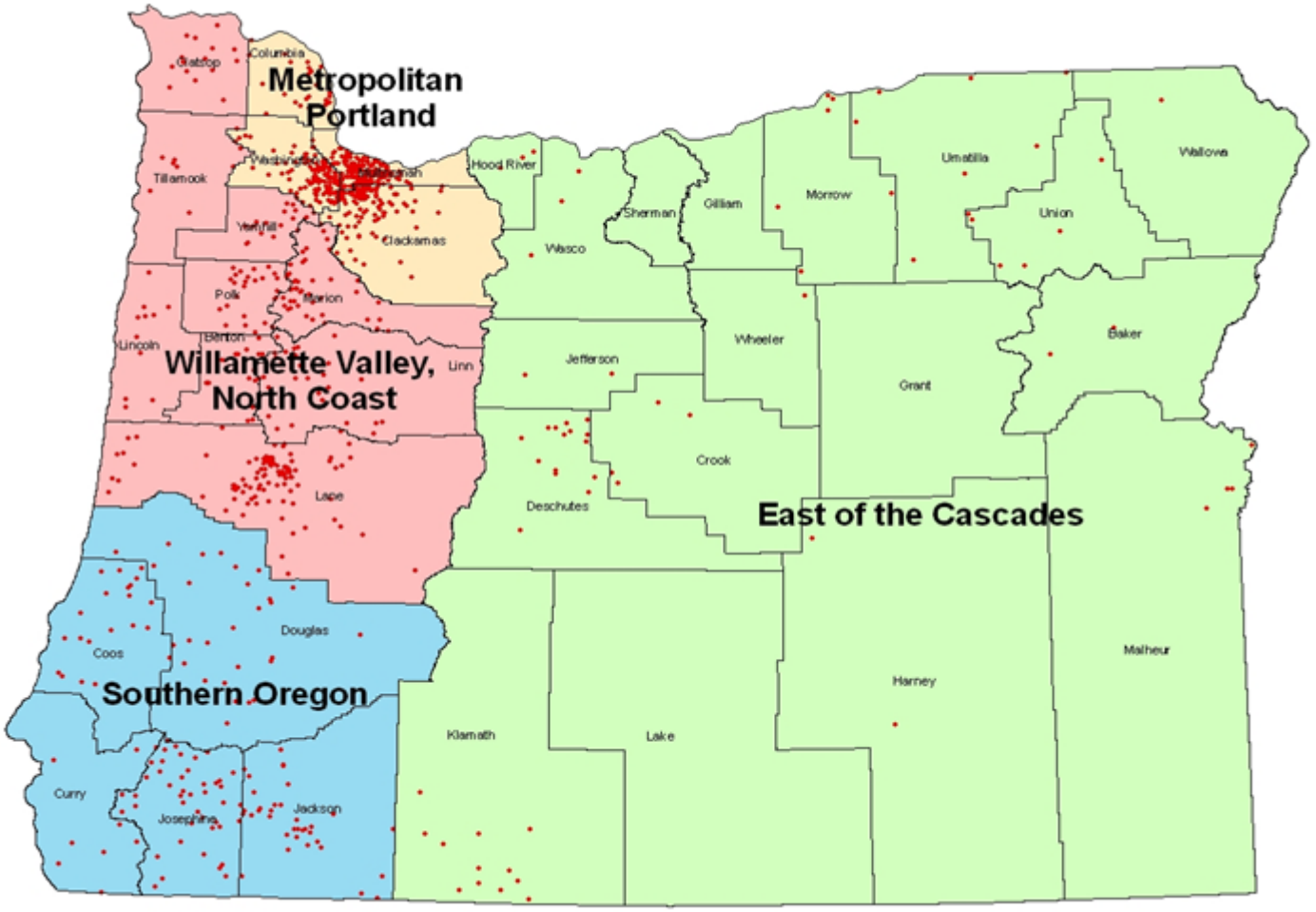
Sampling map



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Awareness of Energy Trust

Awareness has improved since 2008

	2008	2009
All survey respondents	28%	36%
All Energy Trust customers	32%	41%
Homeowners	38%	48%
Single family	39%	50%
Renters	20%	28%
Single family	27%	32%

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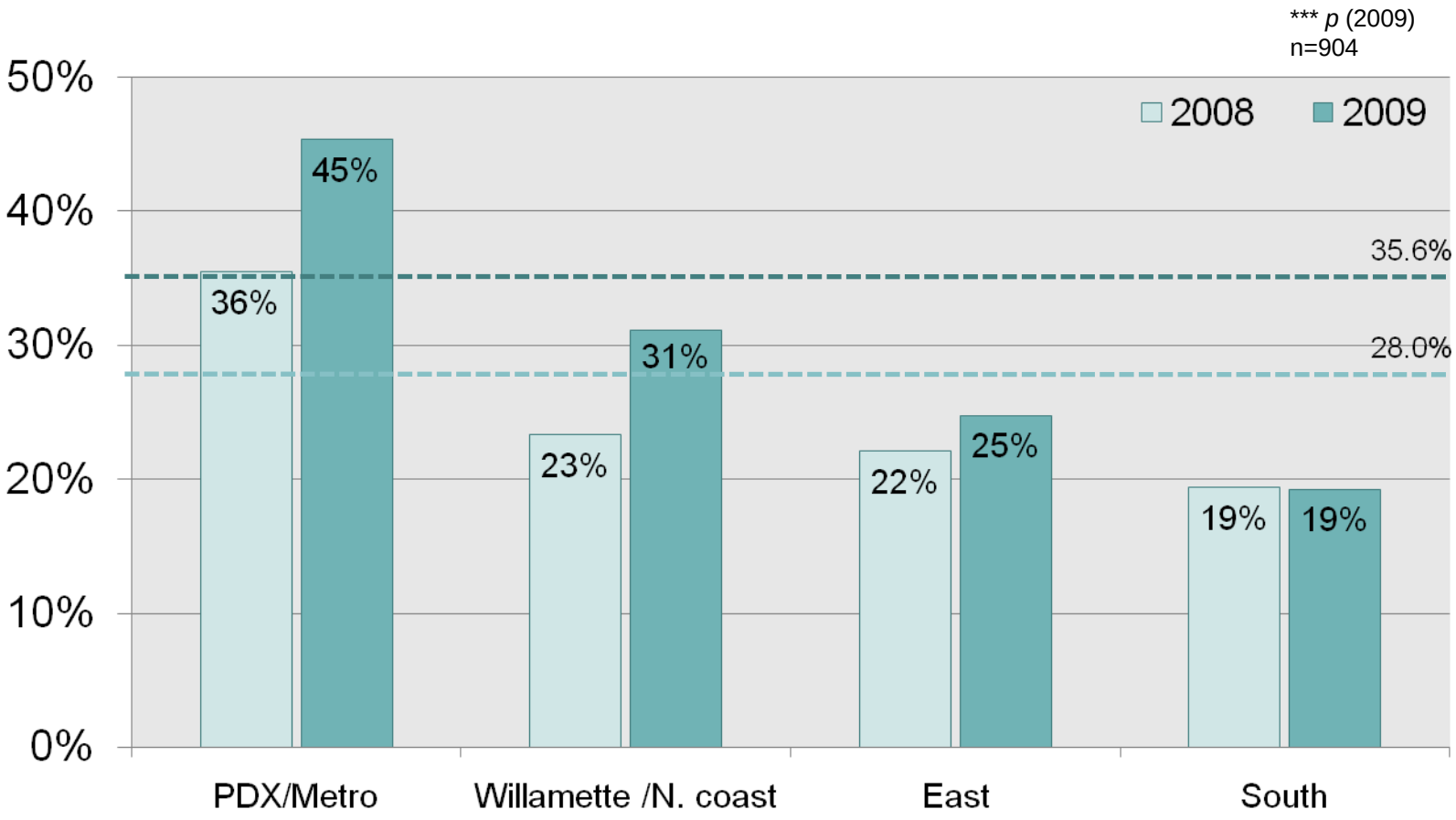
Awareness of Energy Trust



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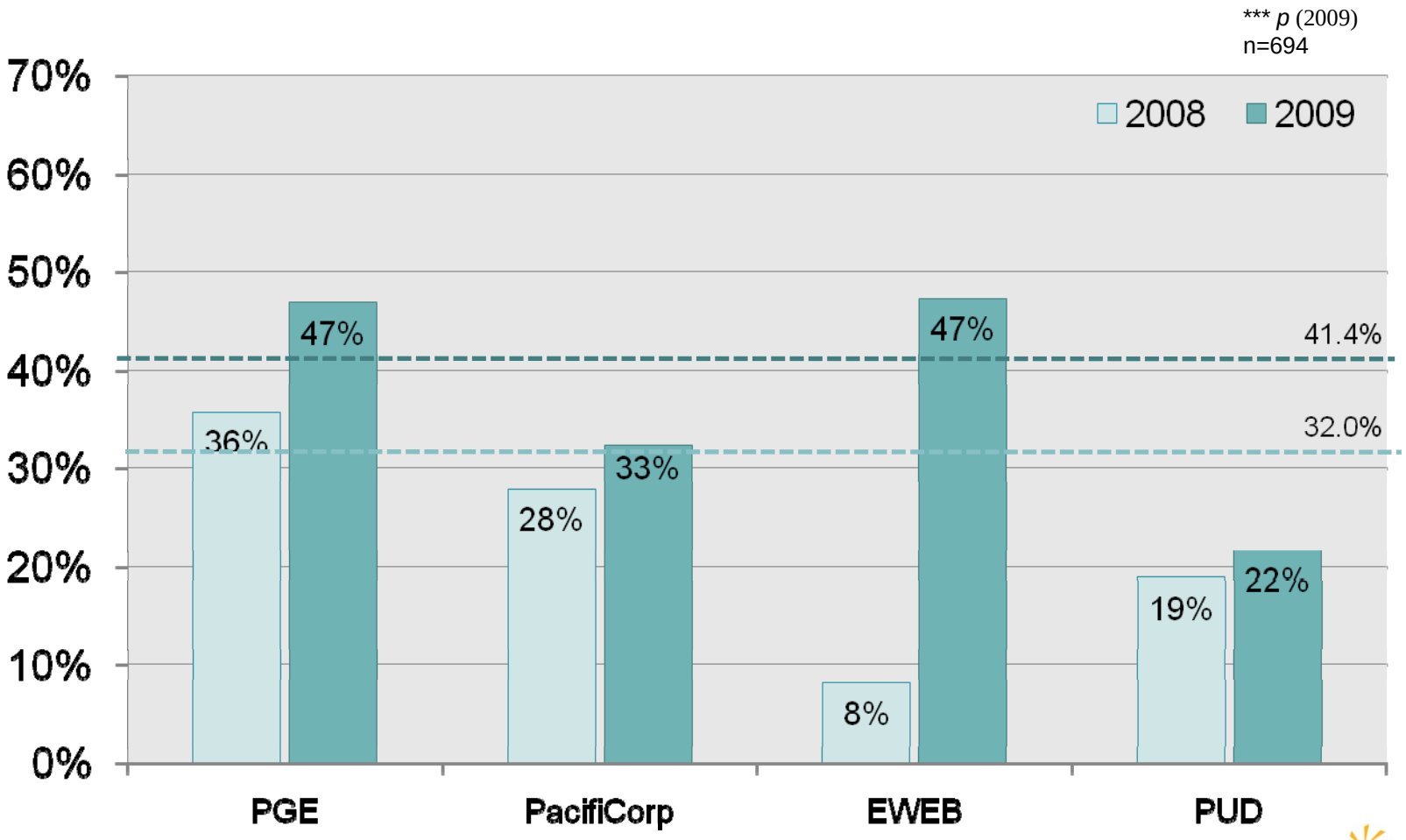
Awareness by electric provider



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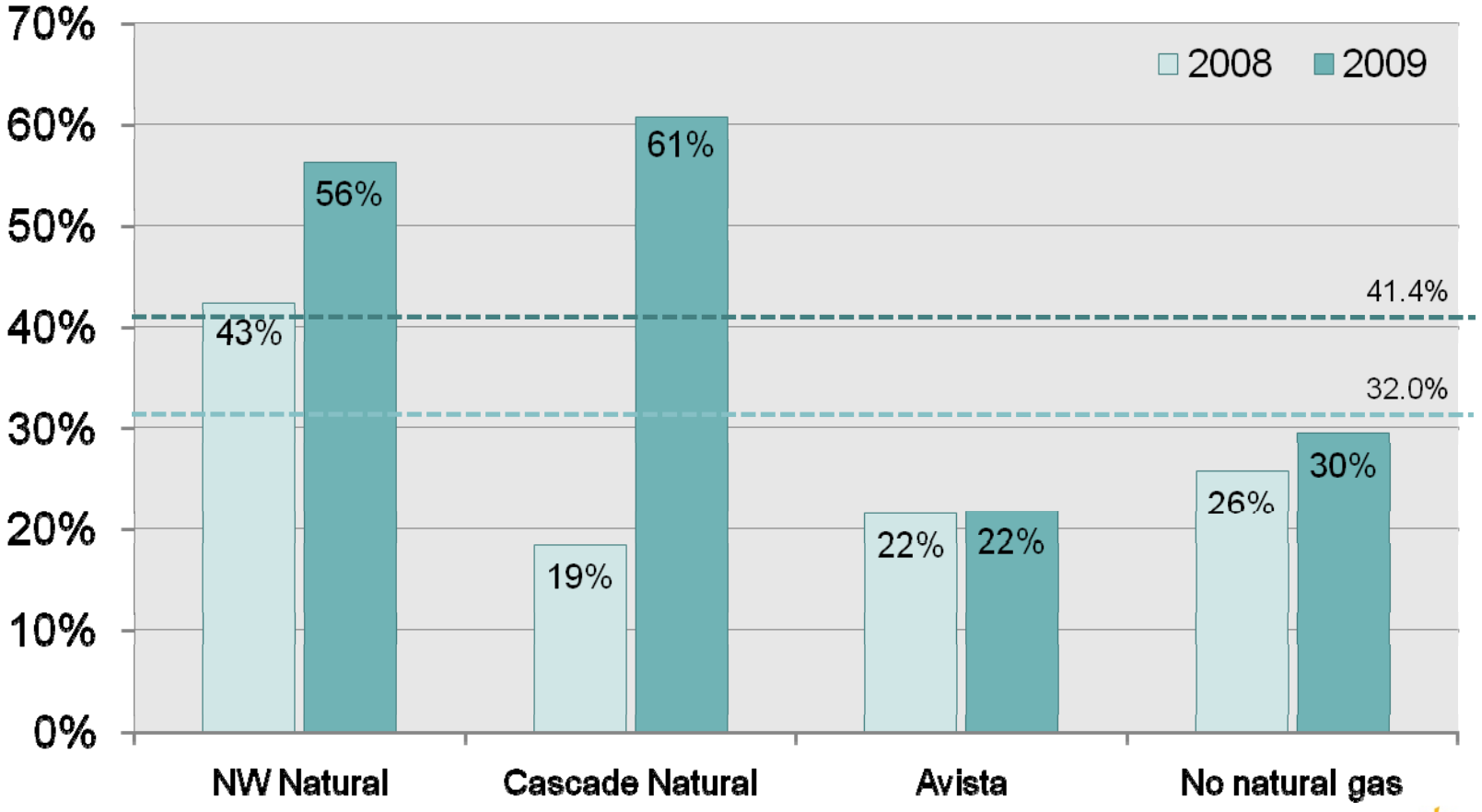
Awareness by natural gas provider

*** *p* (2009)
n=694



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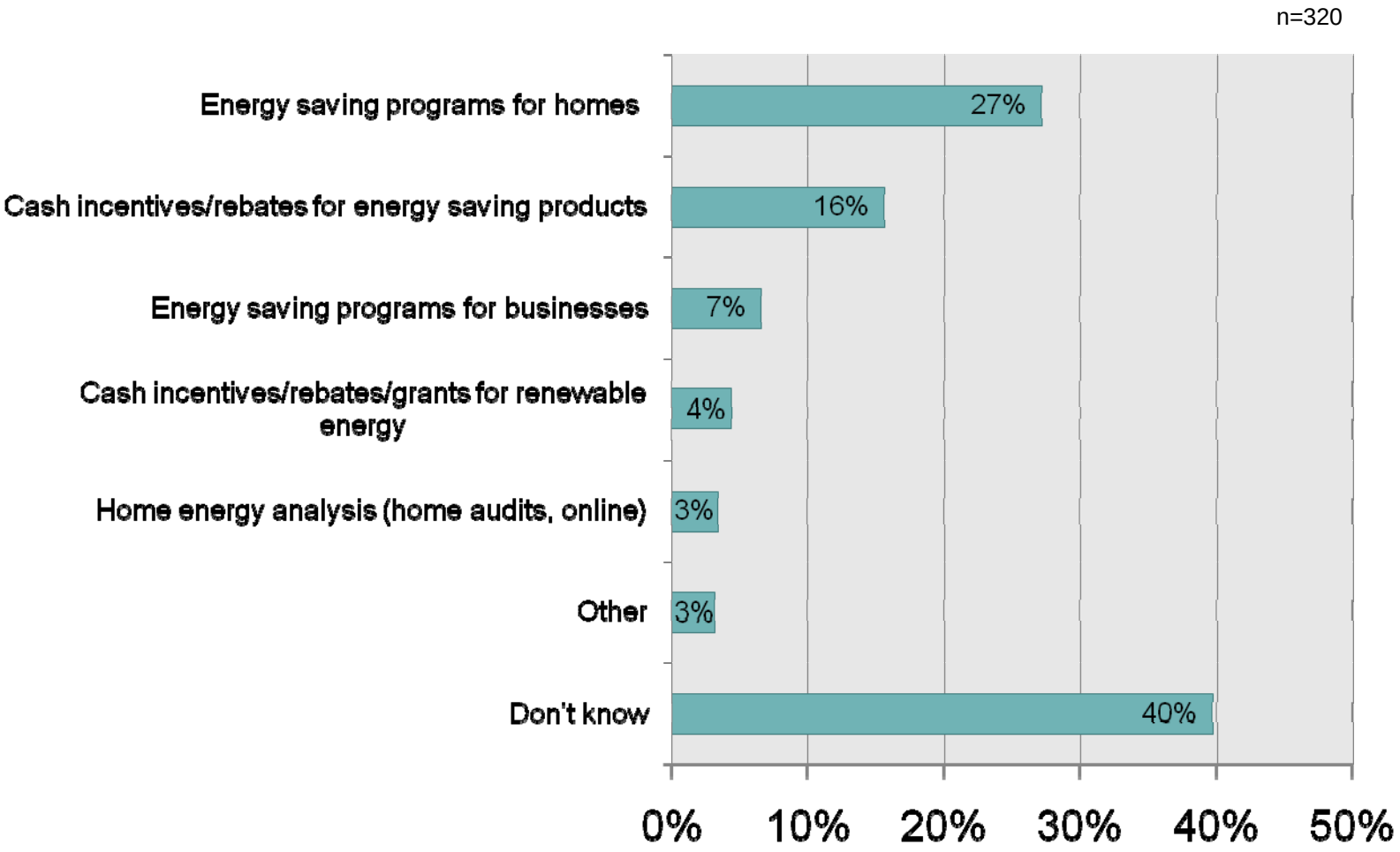
What does Energy Trust offer?



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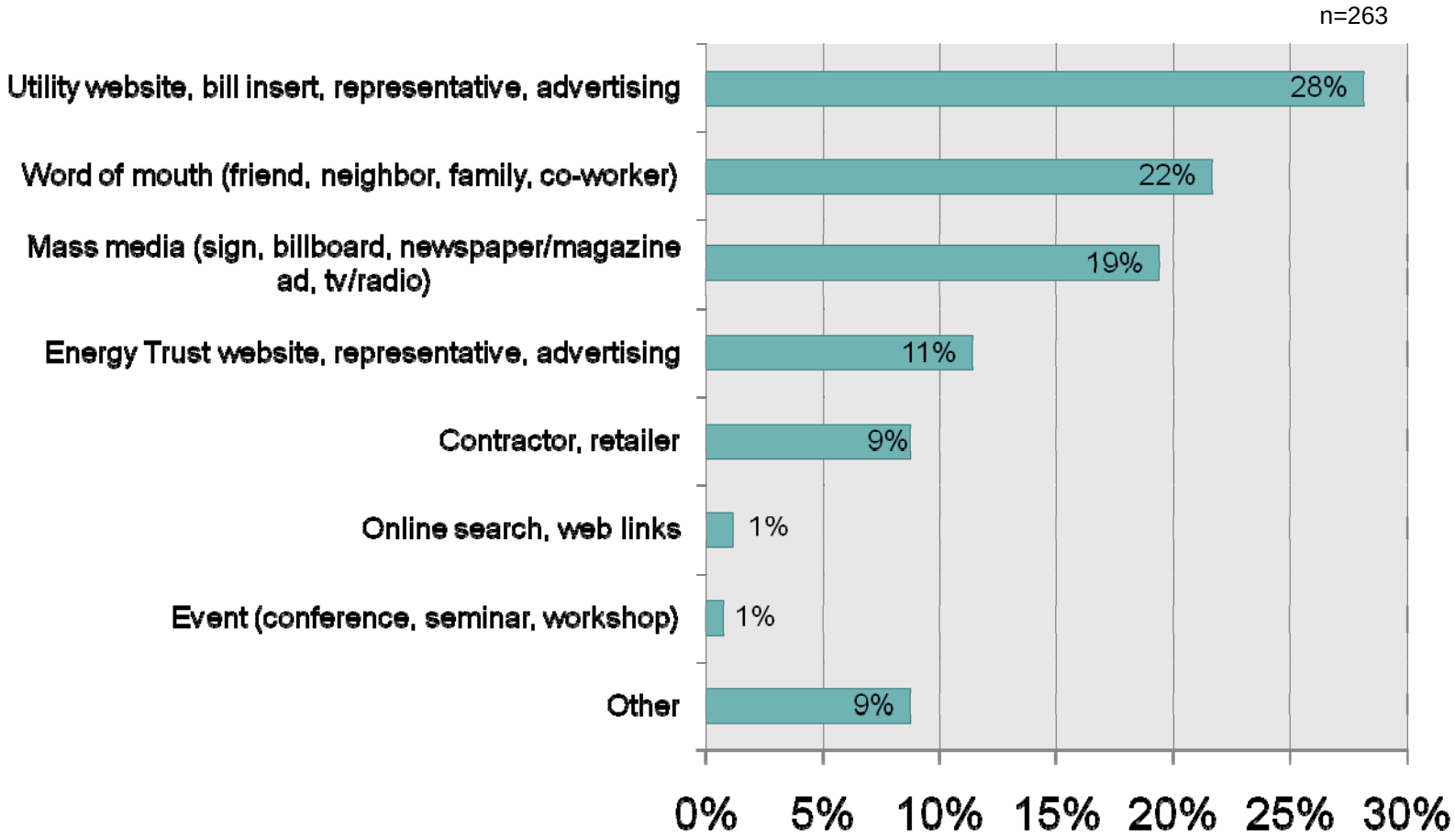
How did you first hear about us?



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Participation in Energy Trust Programs

Participation in 2008 & 2009

	2008	2009
All survey respondents	6%	7%
All Energy Trust customers	7%	9%
Homeowners	10%	13%
Single family	11%	14%
Renters	2%	1%
Single family	5%	0%

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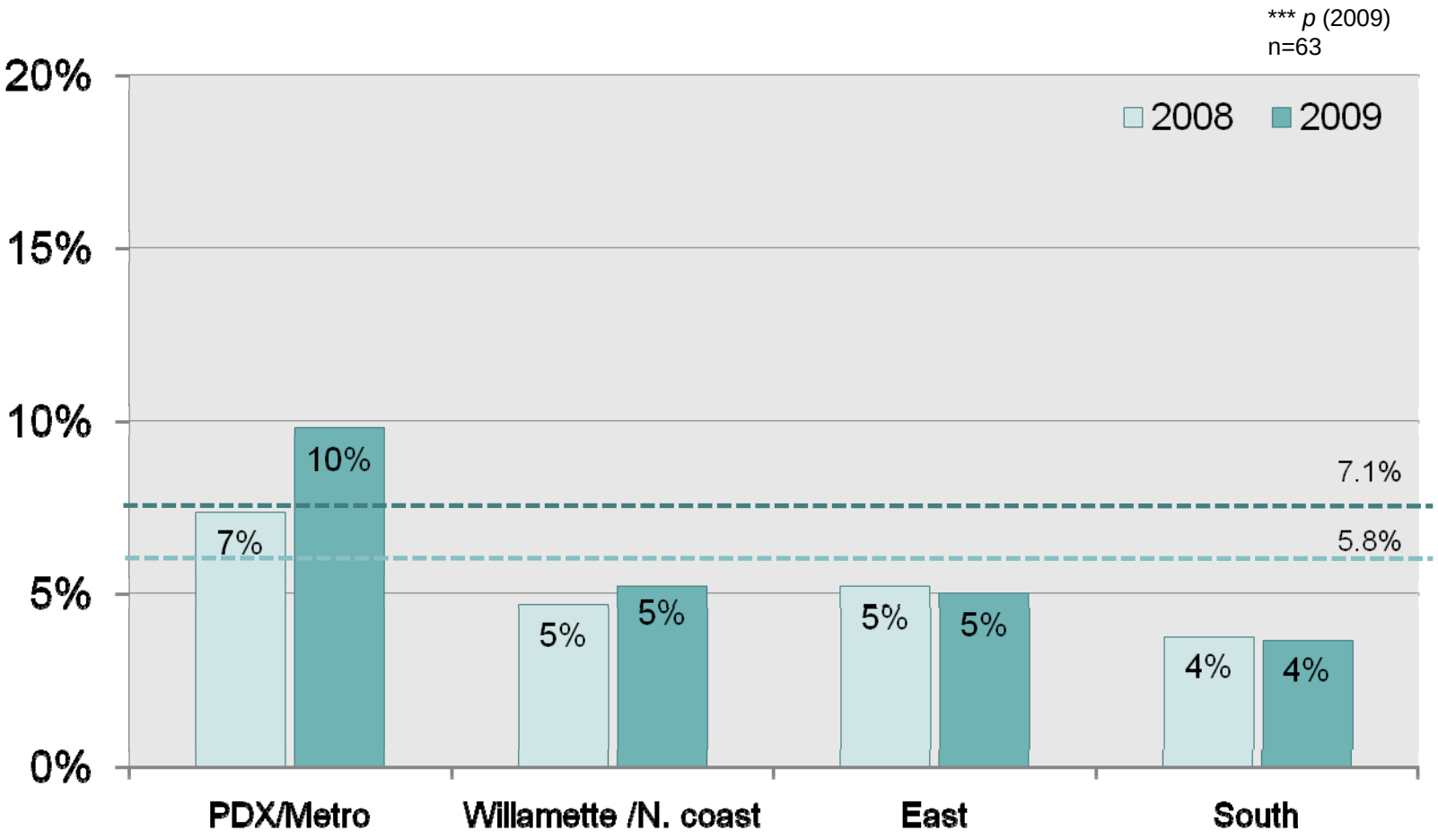
Participation by region



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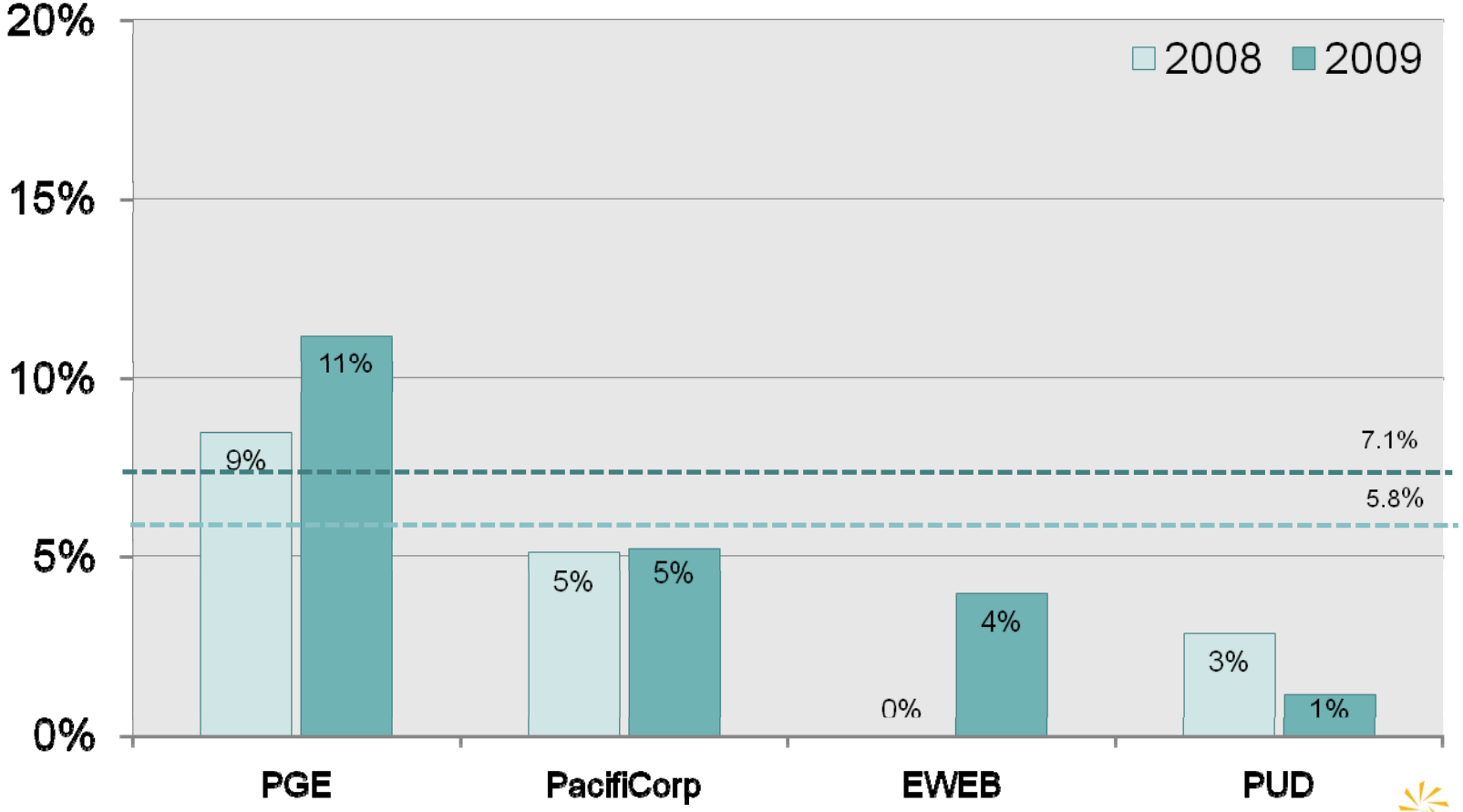
Participation by electric provider

*** *p* (2009)
n=60



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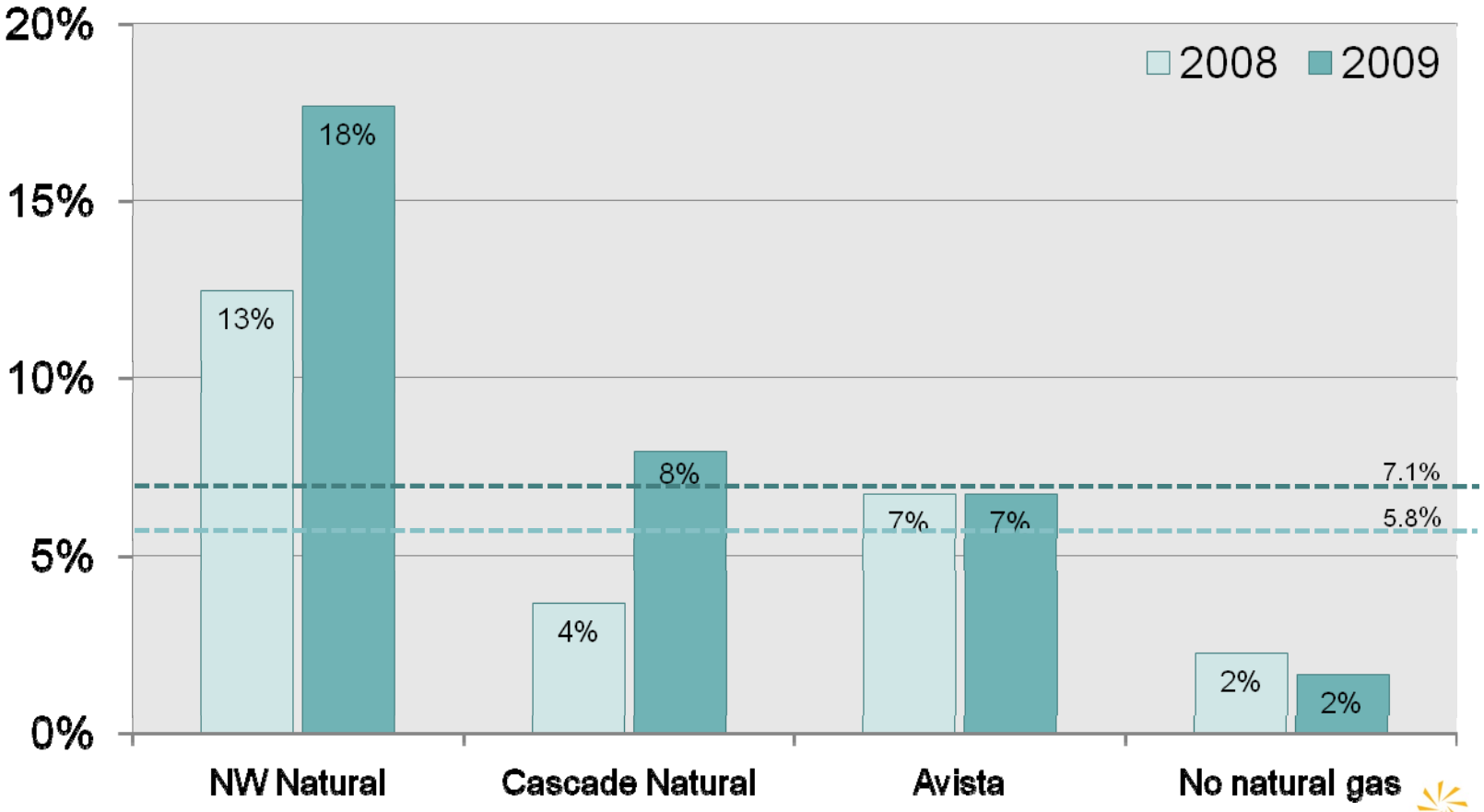
Participation by natural gas provider

*** *p* (2009)
n=60



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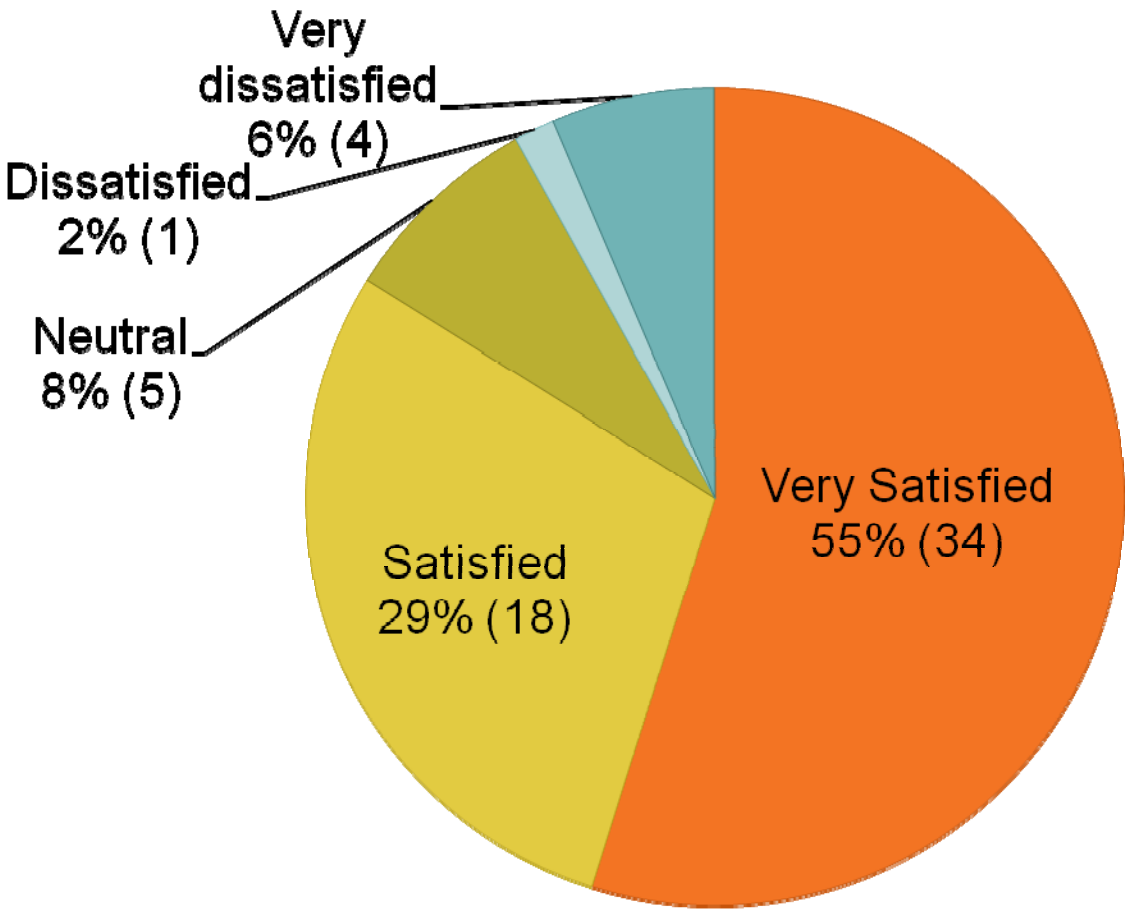
Satisfaction with program participation



n=62

Number of respondents in parentheses.

Respondent Characteristics

Participants vs. Nonparticipants

PARTICIPANTS

- Homeowners (98%)
- Single family homes (84%)
- More likely to be 45-54
- College degree or more (65%)
- Higher income (79% >$50K)
- Gas space and water heat

GENERAL POPULATION

- Mix of owners and renters (64%/36%)
- Mix of single and multifamily
- More likely to be <35 or over 75
- Mix of education levels
- Low/moderate income (57% <$50K)
- Electric space and water heat

NO DIFFERENCE IN:

- Home age
- Primary source of news and information

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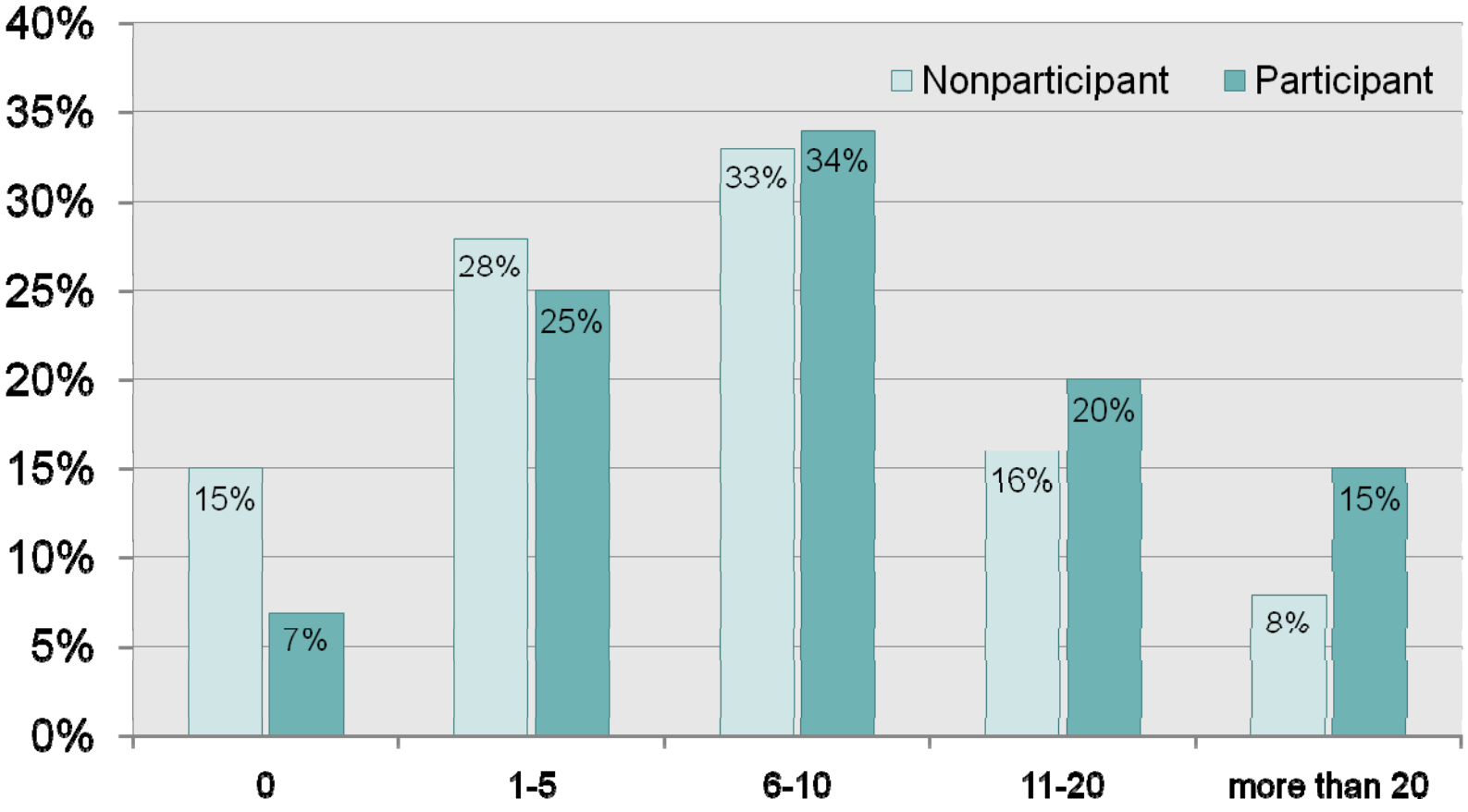
Use of CFLs

ns, *p*
n=687



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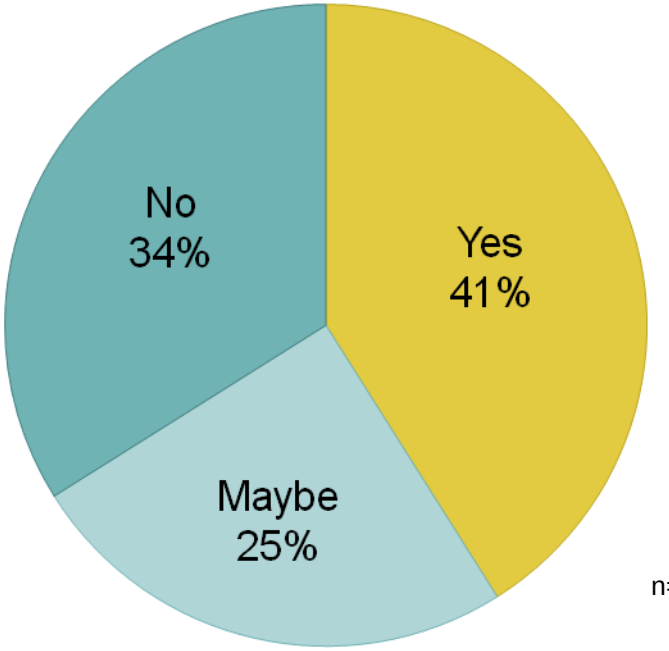
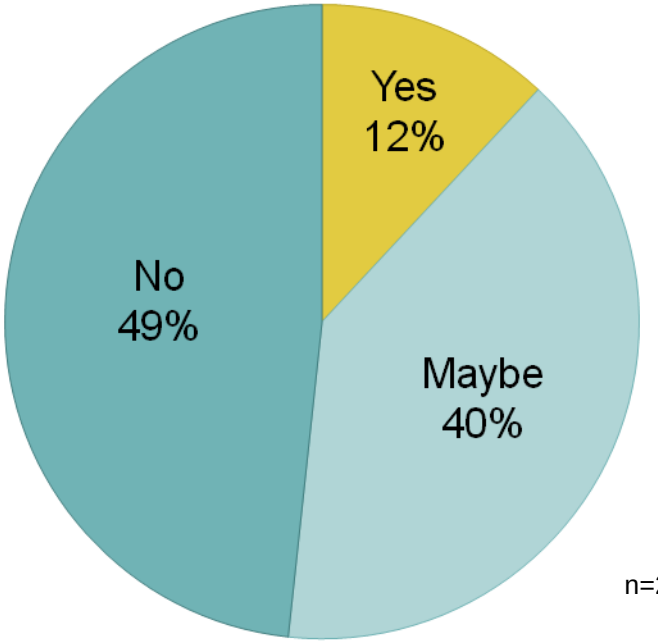
Intention to participation in next year

Participants



** p*
n=59

Nonparticipants



n=210

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Segmentation

What's different this year?

- Different survey questions, particularly attitudes and beliefs
- Different algorithm for segments, not just plugging respondents into old formula
- Better renters sample than 2008

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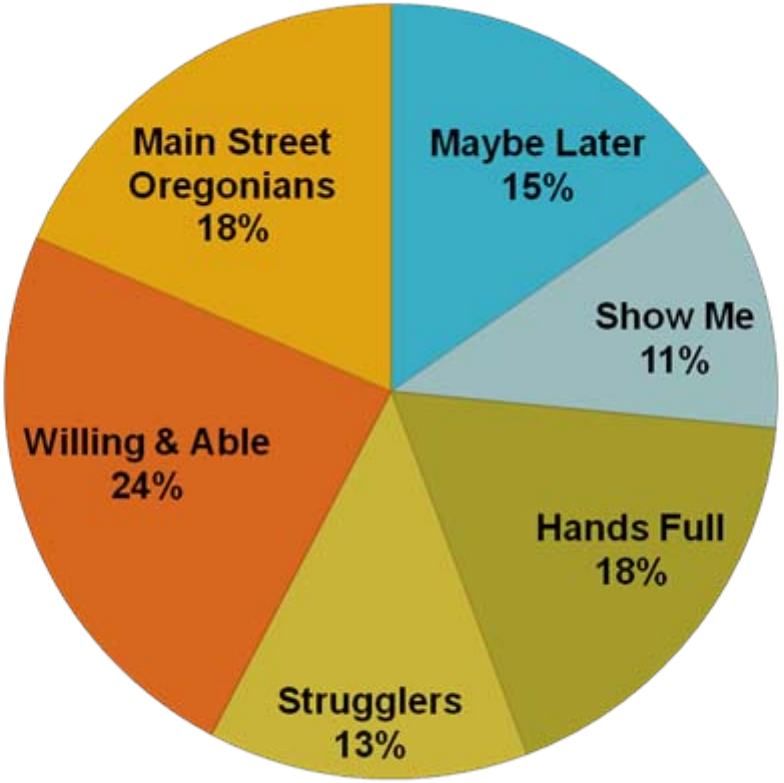
2009 Segmentation



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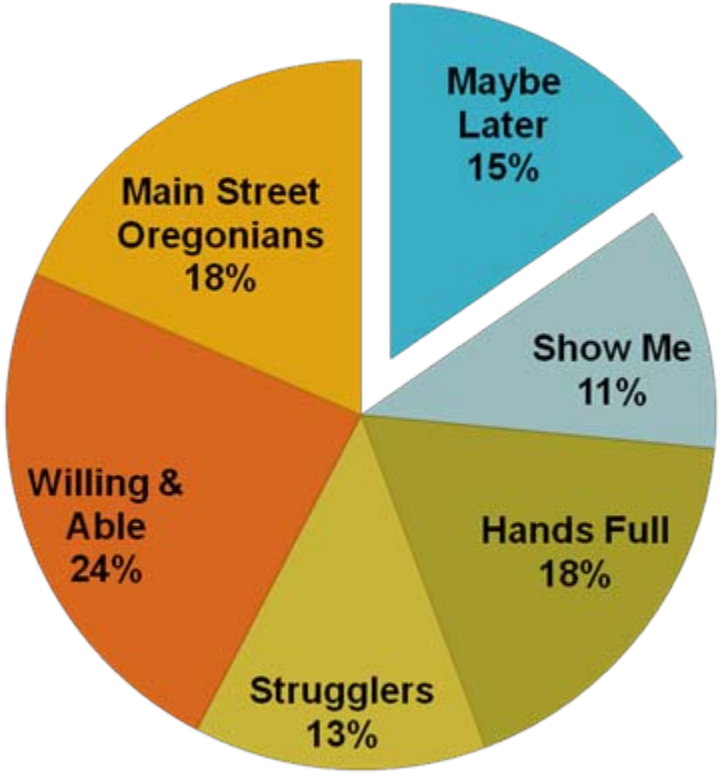
Maybe Later



- Young renters
- Multifamily dwellings
- Low incomes
- Concerned about energy resource issues, have “green” attitudes
- As their incomes increase and they buy homes, may become participants

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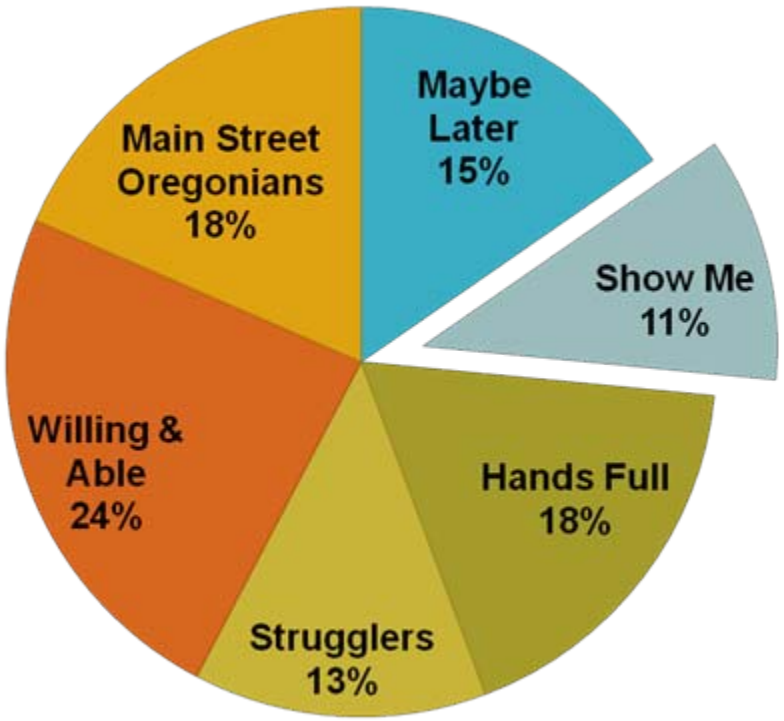
Show Me



- Eastern Oregon homeowners
- Moderate incomes, education
- Most have low energy use
- Least concerned about energy resource issues
- Low opinion of EE for preventing climate change

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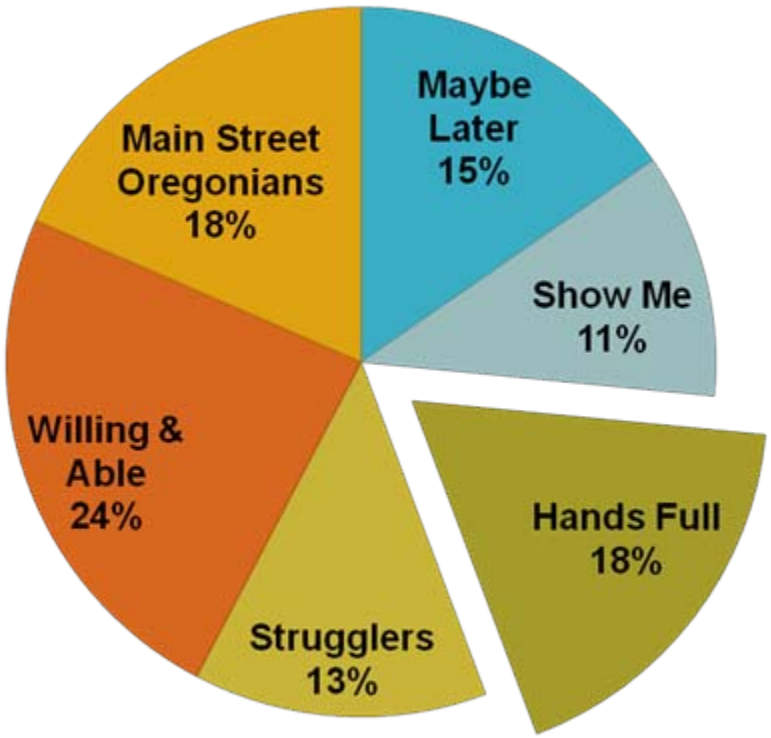
Hands Full



- Middle-aged homeowners
- Larger families (not necessarily kids), lower incomes
- Electric/non-gas heating
- Some concerned about energy resource issues
- Low opinion of EE for preventing climate change

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Strugglers

- Young/middle-aged renters of MF units
- Lowest incomes
- Electric heating, low-medium energy use
- Some concerned about energy resource issues
- Low opinion of EE for preventing climate change

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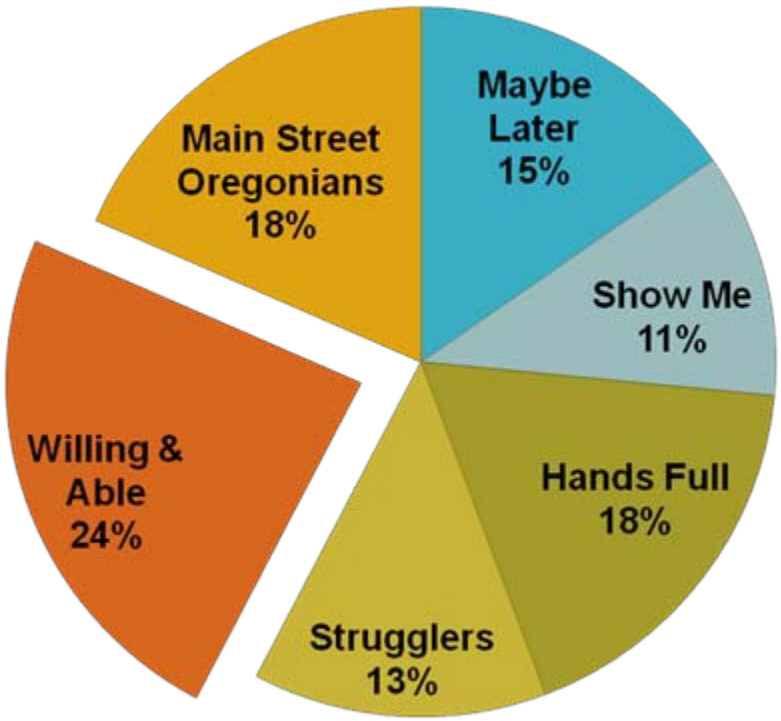
Willing & Able



- Middle-aged homeowners
- Highest incomes, educ.
- Natural gas heating
- Highest energy use of all segments
- Energy Trust participation high
- High opinion of EE for preventing climate change

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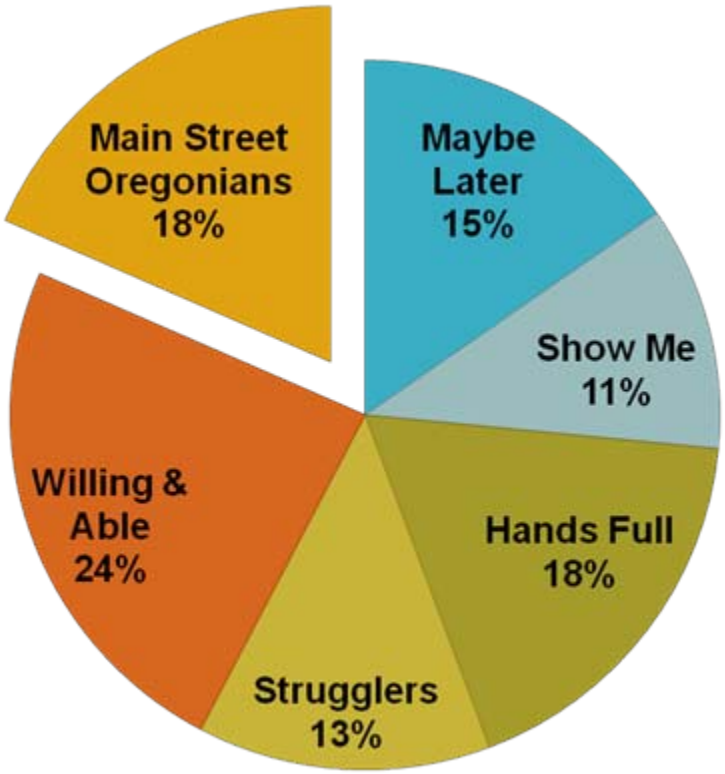
Main Street Oregonians



- Older homeowners
- Non-urban, lower incomes
- Electric heating
- Varied energy use
- Not concerned about energy resource issues
- Low opinion of EE for preventing climate change

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What's next?

- We will repeat the survey in late spring 2010, but with fewer questions
  - Not planning to repeat segmentation
- Raise awareness and participation outside Portland Metro region
- Leverage customer relationship with utilities to increase awareness and participation

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What's next?

- Changes to advertising strategy
- Targeted messaging
  - Target low-cost, no-cost solutions to 'Show Me' and 'Maybe Later' segments
  - Design programs and marketing to engage 'Willing & Able' and 'Main Street Oregonians'
  - Primary messaging should always link saving energy and saving money

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