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Final Report

2011 Oregon Residential Awareness and Perceptions Study

Funded By:

EnergyTrust of Oregon

Prepared By:

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ES EXECUTIVE SUMMARY

This report provides the results of the *2011 Oregon Residential Awareness and Perceptions Study*. This is the fourth consecutive year Research Into Action, Inc. and our subcontractor, Abt SRBI, Inc., have conducted an *Oregon Residential Awareness and Perceptions Study* for Energy Trust of Oregon (Energy Trust). The goal of this report is to provide findings and recommendations Energy Trust may use in its marketing and residential energy-saving programs.

We performed a mixed-mode sampling approach in this year's survey for the first time to counteract a sampling challenge due to the increasing number of cell-phone-only households and the rising cost of telephone data collection. First, using an Address Based Sample (ABS), we mailed two postcards to a random sample of 4,000 Oregon households that are customers of the four utilities Energy Trust of Oregon serves (Portland General Electric, Pacific Power, NW Natural, and Cascade Natural Gas) to solicit the customers' participation in a web survey. One hundred and two households (2.6% of the sample) completed the web survey. Second, we conducted phone surveys with non-respondents to this web survey whose phone numbers were available in the ABS sample. We used Random Digit Dialing (RDD) to the customers' landlines and cell phone numbers, as well as a targeted sample of multifamily residents to fill our sample quotas. We completed 637 surveys with Oregon households in Energy Trust's service area.

The data suggest that more than half (56%) of the Oregon households within the Energy Trust service territory recognize the name of *Energy Trust of Oregon*. This awareness has grown steadily since our first study in 2008. The participation rate in Energy Trust programs also has increased significantly according to self-reports (31%) and verified participation status (47%). These are large increases since the participation rates we reported in 2010 (17% self-reports and 26% verified). We continue to note significant discrepancies between the levels of urban and rural Oregonians' awareness of Energy Trust and participation in its programs.

As in the past studies, we observe demographic and attitudinal differences between those who reported being participants in Energy Trust programs and those who reported not participating in the programs. Compared to nonparticipating households, participating households are overwhelmingly owner-occupied, larger (in square feet), and heated by natural gas, and the primary household member has a college degree. Participants reported greater concern about their utility bills, and a greater use of newspapers and radio for news information.

We also studied specific home features and energy-using behaviors. Eighty-six percent of the Oregon households we contacted reported having installed at least one CFL in their home and 26% of them reported having installed 11 or more CFLs. These figures have changed little since 2009. Web respondents who saw CFL photos as a part of the question reported a much higher installation rate (94%). Ninety percent of the respondents had a thermostat that controlled the temperature in their home, but half of them had a non-programmable type that allows only on/off

or temperature-only settings. Seventy-five percent of the respondents recognized the ENERGY STAR® label; 91% of the web respondents who saw the ENERGY STAR® label reported being aware of it, as compared to 83% nationwide.

We offer the following conclusions and recommendations:

➡ **Conclusion 1:** Energy Trust continues to increase its market presence in Oregon: it is recognized by a majority of the 637 Oregonians surveyed for this study. Most of the Oregonians who participated in this study have a positive image of Energy Trust as a credible organization that provides energy efficiency services. Both self-reported and verified data indicate a significant increase in program participation since 2010.

➡ **Conclusion 2:** Demographic characteristics and phone status of the web respondents from the ABS sample most closely represented the census among all the sampling sources that we employed for this study. Among these web respondents, there was little evidence of fraudulent or inattentive respondents, and the data quality was superior. Telephone data collection, on the other hand, is increasingly more difficult and costly especially when attempting to reach cell phone RDD numbers.

- **Recommendation:** Develop a sampling design based on an ABS sample. While low response rates to the web survey requests through postcard solicitation was an issue, we have confidence that we can increase web survey participation by adopting additional methods for contacting and encouraging participation, such letters instead of postcards and enclosed incentives, instead of a lottery, etc. An ABS sample approach can also allow us to better estimate the Energy Trust participation rate by enabling us to match addresses with Energy Trust's program databases without asking questions related to respondents' program participation.
- **Recommendation:** Develop an additional set of key evaluative measures that can be investigated as a part of this annual study, such as "importance of energy efficiency," awareness of specific Energy Trust program elements, and inclusion of targeted behavior changes Energy Trust is trying to influence.

MEMO

Date: October 14, 2011
To: Board of Directors
From: Sarah Castor, Evaluation Sr. Project Manager
Sue Fletcher, Communications and Customer Service Sr. Manager
Subject: 2011 Residential Awareness and Perceptions Study

The 2011 Oregon Residential Awareness and Perceptions Study is our fourth annual awareness survey. The goals of the study, as in previous years, were: 1) to gather information about the level of awareness Oregonians have of Energy Trust; 2) to compare awareness and participation with similar figures from last year's study, 3) to better understand behaviors and perceptions surrounding the topics of energy and climate change and 4) to test messages that will prompt customers to take action.

For 2011, we attempted a mixed mode survey, beginning with a mailed invitation for 4,000 randomly selected residential households that contained a link to a web survey. A web-based survey has significant advantages over a phone survey: the ability to include visuals and different question types, convenience for the respondent, and potentially lower cost. Unfortunately, response to the mailed invitations was much lower than we expected, requiring most of the responses to be completed by phone in order to meet the project timeline. The 102 responses that we received to the web survey, however, confirmed that the method is superior to phone in its ability to reach a representative group of the population and explore complex issues of awareness, behavior and preference. Next year we plan to attempt another web survey, but with a greater number of invitations and a more compelling request for response.

The results of this year's survey were quite pleasing in terms of demonstrating the continued increase in awareness of, and participation with, Energy Trust. Overall awareness is now 56% and reported participation is 31% (up from 48% and 17% in 2010, respectively). Customers of all utilities were more aware of Energy Trust in 2011 than in 2010, and in all regions. Only customers of Pacific Power were less aware of Energy Trust (47%) than the overall 56% average for all four utilities. While raising awareness and program participation in all territories remains a goal of marketing and outreach activities, Energy Trust is collaborating specifically with Pacific Power on marketing communications funded through Pacific Power 838 dollars to raise awareness and participation in Southern and Eastern Oregon Pacific Power territory. Energy Trust will continue to engage with Pacific Power on these marketing efforts and will suggest altering approaches to branding and customer referral in 2012 to reduce potential confusion and streamline the customer's path to Energy Trust information. It is notable that despite lower awareness numbers, residential programs are currently exceeding their savings goals for Pacific Power. As goals increase, lower awareness may be more

of a limiting factor, but it does not appear to be hindering Energy Trust's ability to reach savings goals at this time.

Most of the respondents felt positively about Energy Trust, agreeing with statements that "Energy Trust is a leader in regards to energy efficiency and renewable energy," and "Energy Trust is a credible information source in regards to energy efficiency and renewable energy." The number of respondents agreeing with these statements had increased since the last time these statements were included in the survey.

For the second year in a row, the top source from which respondents initially heard about Energy Trust and its offers was mass media. This was followed closely by utility bill inserts and websites. Both channels remain prominent components of Energy Trust's outreach strategy for 2012 and the survey results confirm the effectiveness of this approach.

In addition to communication channels, the survey also tested the effectiveness of certain messages. As in previous studies the top supported general energy-efficiency message reinforced financial savings. "You can save energy and money" was considered an effective message by 59 percent of respondents. However, unlike previous studies, the second statement that respondents supported referenced the environmental benefits of saving energy. 58 percent of respondents found, "you can save energy and the planet" to be an effective message. Next year's survey will include previously asked questions about the environmental aspects of energy-efficiency to better understand how this message can be used. We will also look for opportunities to test the use of environmental-benefits messaging in 2012.

Survey respondents scored messages about Energy Trust that referenced our nonprofit status and its ten-year track record of delivering services and cash incentives most favorably. These organizational messages were explored as a means of further reinforcing action-oriented messages. Past studies and focus groups have indicated that consumers respond well to advice about energy-efficiency from an independent nonprofit. To that end, we have included messaging about our nonprofit status in consumer-facing materials. This year nearly half of respondents correctly identified Energy Trust as a nonprofit, an increase from previous studies, and an indication that we are successfully getting that message out to consumers. This year the survey tested language about the length of time that Energy Trust has been providing services. Support for the message, "Energy Trust has 10 years of experience helping Oregonians save energy," reinforces the approach we will take in 2012 to develop messaging in association with our 10 year anniversary.

For the first time this year, respondents were asked a question about their awareness of *Solarize. Solarize* was described as a community-based bulk buying program for residential solar. Overall, 19% of the respondents reported they had heard about

Solarize programs and the rate didn't differ significantly across the state. This effort has received a great deal of media attention and local promotion. These survey results are a strong indicator of the traction this effort has gained statewide.