



# 2013 Residential Awareness and Perceptions Study

**BENENSON STRATEGY GROUP**

**October 2013**

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## **Executive Summary**

The Benenson Strategy Group is pleased to present the findings of the sixth annual Energy Trust of Oregon Residential Awareness and Perceptions Study.

### Objectives

- The goals of this study were to:
  - ✓ Understand consumer attitudes around energy efficiency and consumption.
  - ✓ Present a look at Energy Trust's brand image to residential customers.
  - ✓ Provide an assessment of the services that Energy Trust offers to understand whether the organization is meeting the needs of those who have participated in its programs, and identify targets who are most likely to participate in programs in the future.
  - ✓ Identify recommendations to improve awareness of Energy Trust and its programs and drive participation among residential customers.

### Findings

- Oregon residents are committed to reducing the amount of energy they use in their homes and 73% have already taken steps to do so. 68% of residents indicate that they are likely to take action to reduce their use in the coming year.
- Yet while most residents are already taking actions to reduce their home energy use, few have significant concerns about their energy consumption.
  - ✓ Just 18% are very concerned about the amount of energy they use at home.
- When it comes to the energy they use at home, 37% of residents are most focused on saving money.
  - ✓ 26% are most focused on the comfort of their home, while 24% are most focused on not wasting energy
  - ✓ Just 11% are most focused on protecting the environment, yet this group is more motivated to take action than those focused on money.
- Several barriers are standing in the way of further reductions to energy use: the perception that reducing use is difficult, the perception that increasing efficiency is expensive, and the perception, for some, that their home is already energy efficient enough.
- Energy Trust's image is largely undefined, though generally positive.
  - ✓ With only 51% familiar with the organization, there is significant room to grow awareness and to strengthen and shape the brand's image.
    - Note: Last year's study found that 61% of residents were aware of Energy Trust; this year's question measured familiarity (how much they know about the organization) rather than just knowing the name. So while 48% say that they know nothing at all about Energy Trust in this survey, it should not be equated with having never heard of it.

- Among those who are familiar, Energy Trust is well-liked and seen as trustworthy.
  - ✓ Energy Trust has proven itself to those who have participated in the past, as past participants tend to have a strongly positive view.
- Reported participation in an Energy Trust service has held steady since last year, at 21%.
  - ✓ Those who engaged with Energy Trust had overwhelmingly positive experiences, and a majority of past participants (58%) intend to participate again.
- Those who have seen an Energy Trust ad rate the organization higher on brand awareness, favorability and intention to participate in Energy Trust's programs than those who have not seen an ad.
  - ✓ This is particularly true among those who saw ads online.
  - ✓ Residents who have seen or heard online ads are more likely to want to participate (68% likely to participate) than those who saw ads but not online (55% likely to participate).

## Strategic Recommendations

- **Spread the word**
  - ✓ Given the current low level of familiarity with Energy Trust, build a general awareness campaign designed to boost not just familiarity with Energy Trust but also recognition of and connection with its core mission.
  
- **To drive engagement with Energy Trust, messaging should:**
  - ✓ **Keep it personal...**
    - Focus on household-level benefits, like lowering energy costs, reducing waste and increasing the value of one's home.
  
  - ✓ **... and avoid going too broad**
    - Issues like building Oregon's clean energy economy or reducing carbon emissions are less convincing as reasons to participate than saving energy and money, though they may be appropriate for more general awareness efforts.
  
  - ✓ **Tap into the emotional resonance of avoiding waste**
    - Coupled with a money-saving message, this can provide the impetus for action.
  
  - ✓ **Help residents keep the momentum going**
    - Give residents who haven't taken actions easy first steps to get started, and engage those who have already acted by showing them what else they can do.
  
  - ✓ **Emphasize how easy it is**
    - Highlight how easy and convenient it is to participate with Energy Trust and how quickly the cash incentives are disbursed.
  
- **Promote Energy Saver Kits**
  - ✓ Participants who received Energy Saver Kits were more likely to say that they would participate in an Energy Trust program again in the future than those who did not.
  
- **Strengthen partnerships with contractors**
  - ✓ Residents who are reaching out to contractors are serious about taking action, and are the lowest-hanging fruit for participation; maximizing Energy Trust's relationships with contractors – including links or ads on their websites – can help tap into this pool.
  
- **Continue to grow online advertising**
  - ✓ Residents who have seen or heard online ads are more likely to want to participate than those that have not.

## MEMO

**Date:** November 11, 2013  
**To:** Board of Directors  
**From:** Sarah Castor, Evaluation Sr. Project Manager  
Sue Fletcher, Sr. Communications and Customer Service Manager  
Susan Jamison, Residential Marketing Manager  
Shelly Carlton, Strategic Marketing Manager  
**Subject:** Staff Response to the 2013 Oregon Residential Awareness and Perceptions Study

This is the sixth annual Oregon Residential Awareness and Perceptions Study. As in previous years, a primary goal of the survey was to assess Oregonians' awareness of Energy Trust and energy efficiency in general.

We made several changes to the survey and its methodology this year that make it more accurate and relevant, but which also make it difficult to directly compare results to previous surveys. One major change was in the decision to complete 50% of the surveys with customers via cell phone; in previous years 20% of surveys were completed via cell phone. Newer data from the CDC revealed that 38% of households have no landline (cell phone only) and another 14% complete most of their calls via cell phone. Those figures are up substantially since we began conducting the survey in 2008 with a 20% cell phone sample. The larger cell phone sample gives us a more accurate representation of residential customers.

Another significant change was in the way we asked about awareness of Energy Trust. In previous surveys, we asked if respondents had "heard of" Energy Trust prior to the survey, a "yes or no" question. Often, we found that many people had heard of Energy Trust, but fewer had any awareness of Energy Trust's purpose or offerings. This year, we asked a deeper question about how much they knew about Energy Trust; 51% knew something ("a great deal", "some, but not a lot" or "not much"), while 48% knew nothing about Energy Trust. Because of the different way of asking about awareness, this result cannot be directly compared to previous years, but will give us a better framework for gathering awareness in future surveys.

The study results continue to point to the strength of Energy Trust's brand, and the perception of Energy Trust as neutral, trustworthy and credible among past participants and those less familiar with Energy Trust. The study shows that current strategies, such as expanded online advertising, have been effective and should be continued. It also highlights opportunities to make Energy Trust more "top of mind" with potential customers and the challenge of capturing consumers' attention and countering perceptions relating to the difficulty or cost of energy-saving improvements.

The results point to a continuing need for increased awareness of Energy Trust across a broad residential audience. New tactics to raise awareness and deepen potential customers' knowledge of our offerings, across Energy Trust's service territory, are under consideration, including a general awareness campaign. More sophisticated targeted marketing efforts, utilizing CRM capabilities and new data, will also assist in efforts to increase general awareness and

present the right offer to a customer based on their past participation with Energy Trust or other available characteristics. Expanded educational content and tools on the Energy Trust web site will also help customers identify and select energy improvements.

Survey respondents pointed to the cost of energy-efficiency improvements as a concern. This feedback supports our approach of meeting homeowners where they want to engage and guiding them along a path to improvements over time. The survey recommends using messages that highlight the ease and convenience of working with Energy Trust and elimination of energy waste. It also suggests leveraging contractors as a marketing channel. These recommendations, along with others included in the report, will be considered as residential marketing strategies are developed for 2014.

Energy Trust's Program Marketing Manager for the residential sector and staff in the Communications and Customer Service group will utilize these findings to enhance existing and future marketing efforts. These results will be shared with marketing counterparts at each utility to facilitate customer participation in Energy Trust residential offers.

## Methodology

- The Benenson Strategy Group worked with Issues & Answers to conduct a total of 850 telephone interviews with residents of Oregon from July 2-23, 2013.
  - ✓ This included 800 interviews with residents across Energy Trust’s territory, and an oversample of 50 interviews with customers of Cascade Natural Gas.
  - ✓ The oversample was weighted down after fielding so the complete sample reflects the correct proportion of Cascade Natural Gas customers in Energy Trust’s service territory.
- All respondents were screened to ensure that they were:
  - ✓ Age 18+
  - ✓ Customers of at least one of the following utilities:
    - Portland General Electric
    - Pacific Power
    - NW Natural
    - Cascade Natural Gas
  - ✓ Fully or partially responsible for paying their household’s energy bill or buying new appliances
- The margin of error for the full dataset is  $\pm 3.3\%$  at the 95% confidence level.
  - ✓ The margin of error is higher among subgroups.
  - ✓ The unweighted sample sizes and margin of error for utilities are as follows:

Utility	Unweighted Sample Size	Margin of Error
PGE	442	$\pm 4.7\%$
Pacific Power	316	$\pm 5.5\%$
NW Natural	402	$\pm 4.9\%$
Cascade Natural Gas	77	$\pm 11.2\%$

- ✓ Due to rounding, results may not always add to 100%.
- ✓ All data shown in this report is weighted data.
- The survey was fielded by Issues & Answers, using random-digit dialing of landline phones as well as a cell phone sample; half of the interviews in the main sample were completed over landline phones and half over cell phones, a significant change in methodology from previous years. The oversample was conducted over landlines to allow for geo-specific targeting.
  - ✓ According to CDC data from 2011 (the most recent year available), approximately 38% of Oregonians live in a cell phone-only household, and another 15% in cell-mostly households.<sup>1</sup>
  - ✓ To ensure that the cell phones called belong to people actually living in Oregon, we used a listed cell phone sample of known Oregon residents, rather than using a system based

<sup>1</sup> Blumberg, Stephen J., et al. "Wireless Substitution: State-level Estimates from the National Health Interview Survey, 2010-2011." National Health Statistics Reports, Number 61. October, 2013. <http://www.cdc.gov/nchs/data/nhsr/nhsr061.pdf>



solely on area code and telephone exchange. For extra assurance, we also screened everyone who entered the survey to ensure that they were current Oregon residents.

- The methodological approach taken this year differs from previous years, as does the construction of specific questions and question series; year-over-year changes should be viewed as directional and not apples-to-apples comparisons.

**Research Methodology: Year-Over-Year**

	2008	2009	2010	2011	2012	2013
Telephone	1205	904	956	535	586	850
<i>Landline</i>	<i>1205</i>	<i>904</i>	<i>781</i>	<i>484</i>	<i>469</i>	<i>450</i>
<i>Cell</i>	-	-	<i>175</i>	<i>51</i>	<i>117</i>	<i>400</i>
Online	-	-	-	102	261	-
<b>Total Interviews</b>	<b>1205</b>	<b>904</b>	<b>956</b>	<b>637</b>	<b>847</b>	<b>850</b>

- Also, please note that when discussing “participants” throughout this report, we are referring to self-reported participation. A comparison of reported and actual participation is included.

Terminated Interviews:

- Below is data on terminated interviews and callbacks; up to 3 attempts per telephone number were made to complete the surveys.

	# in Main Sample	# in Oversample
Overall Qualified Response Rate	47%	23%
Number of General Callbacks	123	4
Number of Scheduled Callbacks	127	5
Cell phone while driving	77	0
<b><i>Reason for Termination</i></b>		
Not 18/resident of OR	216	10
Not in service area	74	3
Not responsible for energy decisions	124	10
Employment screener	21	5
Not owner/renter	17	2
Not customer of qualifying utility	229	82

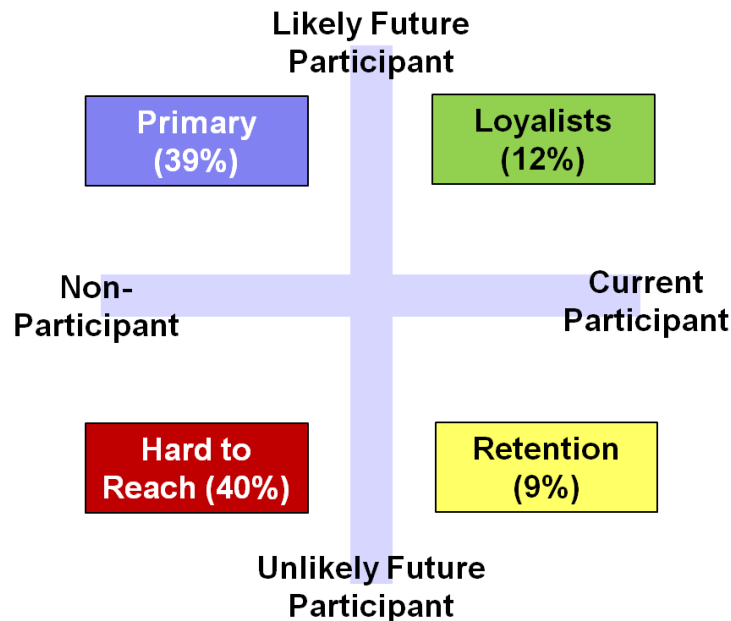
### Demographics of Respondents

- Below are key demographics of survey respondents. For breakdown by all demographics, please see the topline data at the end of this report. This is weighted data.

	Group	Census (Total OR)	2011 Respondents	2012 Respondents	2013 Respondents
Region	Metro PDX	46%	49%	46%	44%
	Willamette Valley/ North Coast	30%	25%	29%	31%
	South	12%	15%	14%	13%
	East	12%	11%	11%	12%
Utility	PGE	-	53%	48%	48%
	Pacific Power	-	41%	35%	39%
	NW Natural	-	43%	40%	47%
	Cascade Natural Gas	-	4%	3%	4%
Age	18-34	29%	19%	10%	18%
	35-49	26%	25%	17%	25%
	50-64	26%	31%	35%	30%
	65+	19%	23%	35%	26%
Race	White	83%	88%	-	83%
	Hispanic	10%	2%	-	6%
	African-American	1%	3%	-	1%
	Other/Refused	6%	7%	-	10%
Home Ownership	Owners	64%	66%	75%	66%
	Renters	36%	34%	25%	34%
Housing Type	Single-family detached	-	67%	68%	68%
	Single-family attached	-	5%	2%	5%
	Duplex, triplex, or fourplex	-	6%	4%	4%
	Apt or condo	-	15%	12%	14%
	Manufactured or mobile home/other	-	7%	14%	7%

## Key Targets

- To better understand the universe of residents and develop targets for messaging and marketing, we divided residents into one of four buckets, based on their past relationship with Energy Trust and their stated likelihood to participate in Energy Trust programs or incentives in the future.



- **Loyalists**: They know and like Energy Trust, and they want to use Energy Trust services and incentives again.
  - ✓ What they need: To be presented with the opportunity to participate.
- **Primary Target**: Half don't know Energy Trust, and the vast majority can't name anything Energy Trust offers – but they are highly motivated to act.
  - ✓ What they need: To be presented with information about Energy Trust and the services it offers.
- **Retention**: They've taken action, and now think they've done enough.
  - ✓ What they need: To be convinced that there's more they can do, and that it's easy.
- **Hard to Reach**: They show much less interest in reducing their energy consumption.
  - ✓ They should not be specifically targeted at this time.

### Snapshot of Groups

	Loyalists	Primary Target	Retention	Hard to Reach
Who They Are	-Used Energy Trust in Past -Likely to Use in Future	-Haven't Used Energy Trust -Likely to Use in Future	-Used Energy Trust in Past -Not Likely to Use in Future	-Haven't Used Energy Trust -Not Likely to Use in Future
% of Residents	12%	39%	9%	40%
Relationship with Energy Trust	High Familiarity, High Favorability	Low Familiarity, Moderate Favorability	High Familiarity, High Favorability	Low Familiarity, Low Favorability
Concern about Home Energy Use	High (76% concerned)	High (73%)	Low (50%)	Low (50%)
Perception of Home's Energy Efficiency	Moderate/High (83% efficient)	Moderate (71%)	Very High (93%)	Moderate (78%)
Likelihood to Reduce Use	High (88% Likely)	High (84%)	Low (46%)	Low/Moderate (52%)
Most Important	1) Saving money 2) Protecting environment	1) Saving money 2) Not wasting	1) Saving money 2) Comfort	1) Saving money 2) Comfort
Key Barrier	Cost	Cost	Difficulty of making further improvements	Lack of Information

### Demographics of Groups

	Loyalists	Primary Target	Retention	Hard to Reach
Own/Rent Home	Owners: 83% Renters: 17%	Owners: 62% Renters: 38%	Owners: 88% Renters: 12%	Owners: 60% Renters: 40%
Size of Home	<1500 sq ft: 27% >1500 sq ft: 67%	<1500 sq ft: 46% >1500 sq ft: 43%	<1500 sq ft: 30% >1500 sq ft: 64%	<1500 sq ft: 46% >1500 sq ft: 44%
Year Home Built	<1970: 38% 1970-1992: 32% 1993-2000: 14% 2001+: 12%	<1970: 35% 1970-1992: 27% 1993-2000: 15% 2001+: 11%	<1970: 29% 1970-1992: 32% 1993-2000: 12% 2001+: 19%	<1970: 32% 1970-1992: 28% 1993-2000: 11% 2001+: 13%
Income	<30K: 8% \$30-\$50K: 13% \$50-\$90K: 30% \$90K+: 19%	<30K: 22% \$30-\$50K: 20% \$50-\$90K: 25% \$90K+: 8%	<30K: 8% \$30-\$50K: 14% \$50-\$90K: 19% \$90K+: 26%	<30K: 22% \$30-\$50K: 19% \$50-\$90K: 19% \$90K+: 10%
Age	18-34: 10% 35-49: 34% 50-64: 35% 65+: 21%	18-34: 22% 35-49: 32% 50-64: 29% 65+: 18%	18-34: 11% 35-49: 15% 50-64: 45% 65+: 29%	18-34: 18% 35-49: 19% 50-64: 27% 65+: 36%
Region	Metro PDX: 59% WV/N. Coast: 19% South: 13% East: 8%	Metro PDX: 41% WV/N. Coast: 29% South: 17% East: 13%	Metro PDX: 48% WV/N. Coast: 28% South: 13% East: 11%	Metro PDX: 41% WV/N. Coast: 36% South: 9% East: 14%

## Detailed Findings

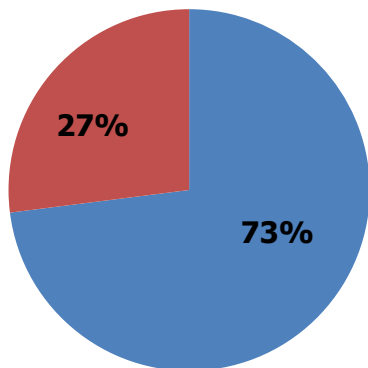
### Energy Efficiency Attitudinal Landscape

#### Attitudes around Energy Use

- Oregon residents are already actively engaged in reducing their home energy use...
  - ✓ 73% say they have taken some kind of steps to reduce the amount of energy they use in their homes in the past year.
    - Higher levels of action are seen among women and those under 35.
    - Lower levels of action are seen among those living east of the Cascades, where just 59% say they've taken steps.
- ...and are motivated to keep the momentum going.
  - ✓ 68% say they are likely to take actions to reduce their energy use in the next year, including 38% who are very likely.

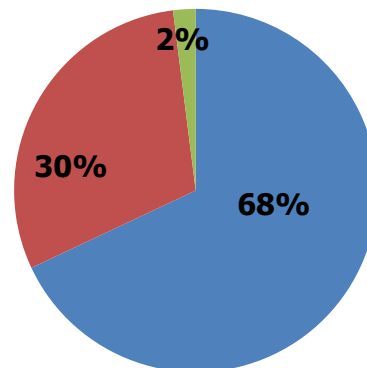
#### Past Year

- Took steps
- Did not take steps



#### Next Year

- Likely to take steps
- Not likely to take steps
- Not sure



- Residents who have taken action to reduce energy use in the past are likely to continue trying to reduce their consumption.
  - ✓ 80% of those who have already taken steps to reduce their energy consumption are likely to continue next year, compared to the 35% of those who did not attempt to reduce their use last year.
- Concern about the amount of energy used in their homes is widespread but not intense.
  - ✓ 62% of residents are concerned with the amount of energy consumed in their home, but just 18% are very concerned.

- Perceptions that their homes are already energy efficient are not hindering action broadly, though they are diminishing the urgency for some.
  - ✓ 77% of residents say their home is already energy efficient; among that group, 69% are likely to take steps to reduce their use in the next year.
  - ✓ The 22% who say their home is “very” energy efficient are divided: 42% are very motivated to take further actions, while 37% are unlikely to take any actions.
    - 70% of this group reported taking steps in the past year to reduce their use; they were more likely than others to have conducted an energy audit (either on their own or with a professional) and to have purchased energy-efficient appliances.
    - They are no more likely than others to use CFLs or LEDs.
- Those with non-efficient homes are drawn in by Energy Trust’s offerings, with 59% saying they are likely to participate in Energy Trust services in the next year, compared with 49% of those whose homes are efficient.

### **Motivations for Action**

- Residents are most motivated to reduce their energy use in order to save money.
  - ✓ 37% say “saving money” is most important when they think about their energy use.
    - Lower income, younger residents, especially younger women, and renters are particularly motivated by saving money.
- But at the same time, many think increasing energy efficiency is expensive.
  - ✓ 57% of residents believe that making their home more energy efficient would be expensive, including 34% who think it would be “too expensive”.
    - Those with the least efficient homes face the biggest barrier when it comes to cost: 47% of those with non-efficient homes say that making their home more efficient would be “too expensive”; comparatively, 31% of those who have efficient homes say it would be “too expensive.”
    - And among those who say it would be “too expensive,” just 31% say they are likely to participate in an Energy Trust service in the next year.
- Not wasting energy and improving the comfort of one’s home fall behind saving money as most important when thinking about their energy use; they are salient motivators for about one in four residents.
  - ✓ When thinking about their energy use, 26% say the comfort of their home is most important, and 24% say not wasting energy is most important.
- Protecting the environment was a distant fourth, with only one in ten residents saying it was most important.
  - ✓ But protecting the environment is very motivating for that slice of residents, who are:
    - More likely to have engaged with Energy Trust in the past: 32% vs. 21% overall.
    - More likely to take actions in the coming year: 50% very likely vs. 38% overall.
    - More likely to engage with Energy Trust in the coming year: 61% likely vs. 51% overall.

- The anti-waste theme does tap into deeply-held values that motivate action on this issue, even though not wasting energy does not rise to the top as most important when pitted head-to-head against saving money.
  - ✓ 90% of consumers said that “I hate wasting anything, including the energy in my home” describes them, including 53% who say it describes them a great deal.
    - Among those who say it describes them a great deal, 81% say they have taken steps to reduce their energy use in the past year, and 51% say they are very likely to take steps in the next year.
- The desire to save money is slightly less tied to action.
  - ✓ 83% said that “When it comes to my energy use, the most important thing is reducing my bill” describes them, including 46% who say it describes them a great deal.
    - Among this group, 78% have taken steps to reduce their consumption in the past year, but just 41% are very likely to take steps in the next year.

### Barriers to Reducing Energy Consumption

- Several barriers stand in the way of reducing home energy use for residents.
- *The Cost of Efficiency*
  - ✓ There is a widespread perception that energy efficiency, and particularly renewable energy, is expensive.
    - 57% say making their home more energy efficient would be expensive, including 34% who say it would be too expensive.
    - 62% say using renewable energy would be expensive, including 36% who say it would be too expensive.
  - ✓ 66% say that “I want to make my home more energy efficient but I just can’t afford it” describes them, including 35% who say the phrase describes them a great deal.
    - Again, those with the least efficient homes are most daunted by the cost: among those who say their home is not efficient, 58% say the statement describes them a great deal.
- *The Difficulty of Reducing Use*
  - ✓ Reducing the amount of energy used at home isn’t easy, according to 58% of residents.
    - Even among those who have taken steps to decrease their use – and among those who have used an Energy Trust program – a majority say it is difficult to reduce the amount of energy they use.
      - However, only 11% of residents say it is very difficult, indicating that this is not an overwhelming barrier for most.
    - Those who have participated in an Energy Trust program in the past but don’t plan to again (the Retention group) find reducing the amount of energy they use to be particularly hard, with 85% saying it is difficult, including 25% who say it is very difficult.



- *Residents Know What to Do...*
  - ✓ Residents say they know what to do to reduce their home energy use.
    - 80% say the phrase “When it comes to reducing my energy consumption, I know exactly what steps I should be taking” describes them, including 37% who say it describes them a great deal.
    - Younger residents are less tuned in to what they should be doing, as just 64% of those under age 35 say the phrase describes them.
  - ✓ Even those who haven’t taken steps to reduce their use in the past year say they know what to do, with 73% saying the statement describes them.
  - ✓ Not surprisingly, knowing what to do drives the intention to act.
    - Among those who say that “When it comes to reducing my energy consumption, I know exactly what steps I should be taking” describes them “a great deal,” 46% say they are very likely to take steps to reduce their use.
    - Among those who say the statement describes them “some but not a lot,” just 32% say they are very likely to act.
- *... But Cynicism Stands in the Way for Some*
  - ✓ While not a mainstream view, there is a slight undercurrent of cynicism around energy-efficient products and the impact of reducing one’s energy use.
    - More than one in three residents say that “reducing the amount of energy I use in my home will make my home less comfortable for me and my family” and that “I think energy-efficient products are just another way for people to make money by charging more.”

### Actions Taken

- Oregonians are taking action in large numbers to reduce the amount of energy they use in their homes.
  - ✓ 73% report that they have taken steps to reduce their use in the past year, while 27% say they have not.
- The majority of those who have acted are taking steps at the everyday level – more than six in ten are routinely turning down the thermostat, unplugging chargers or electronics, and installing CFL bulbs.
  - ✓ In addition, a number of residents have taken larger or more capital-intensive steps for their homes, like purchasing an efficient appliance (42%) or adding insulation (35%).
  - ✓ Among those who took an action eligible for incentives in the past year, 80% indicated that they had received a check from Energy Trust for their action.
    - Of verified participants, 76% of those who took an action eligible for incentives in the past year indicated that they had received a check from Energy Trust.
- Residents are more likely to plan on taking habitual actions in the coming year than to commit to purchase decisions, even for small-dollar items like CFL bulbs.

- More than one in four residents, and one in three Primary group residents, plan to conduct an energy audit themselves in the coming year.
  - ✓ This could provide an opening for Energy Trust to offer assistance and resources as these residents discover the ways in which their home's efficiency could be improved.

**Actions to Reduce the Amount of Energy Used In Home**

Action	Overall		Primary Target Group
	Already taken	Plan to take in next year	Plan to take in next year
Routinely turn down the thermostat	71%	63%	65%
Bought or installed CFL bulbs	63%	45%	47%
Routinely unplug chargers/electronics	61%	63%	63%
Bought or installed LED bulbs	53%	44%	49%
Bought an energy-efficient appliance	42%	31%	35%
Added insulation/sealed leaks/ducts	35%	31%	36%
Replaced a washer, refrigerator, freezer	34%	19%	23%
Installed a programmable thermostat	28%	12%	14%
Replaced windows or installed energy-efficient windows	22%	16%	17%
Recycled an old or extra refrigerator	22%	16%	21%
Installed a furnace, fireplace, heat pump, or water heater	21%	13%	15%
Conducted an energy audit yourself	18%	27%	31%
Had a professional energy audit	10%	11%	13%
Added a solar electric system or solar water heating system	4%	5%	6%
<i>Any action</i>	97%	89%	90%
<i>Actions eligible for incentives</i>	75%	66%	72%
<i>Only actions not eligible for incentives</i>	21%	22%	16%

Already Taken: Among those who report taking actions in past 12 months

Plan to Take: Among those who report being likely to take actions in next 12 months

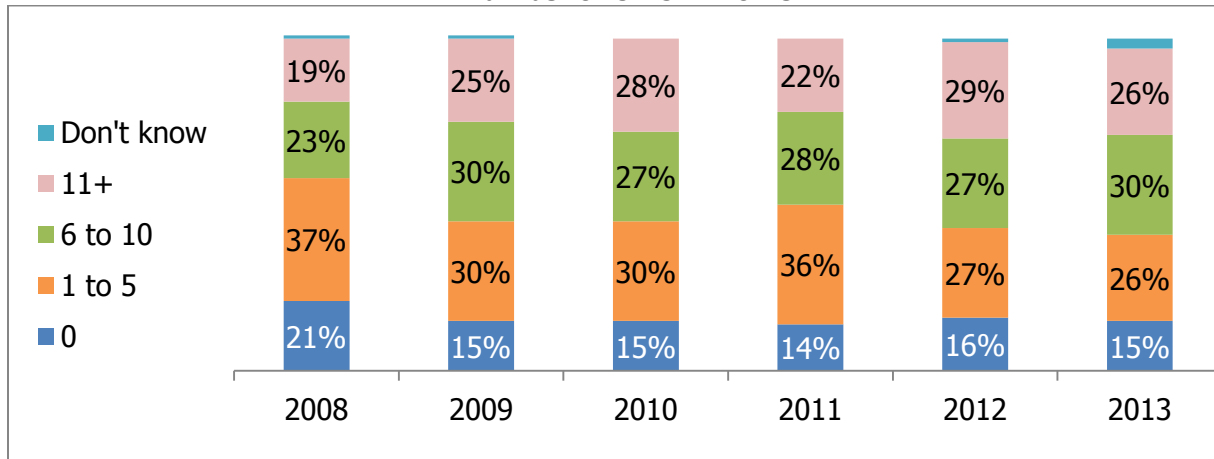
### Actions to Reduce the Amount of Energy Used In Home

Actions Taken	PGE	Pacific Power	NW Natural	CNG*
Routinely turn down the thermostat	72%	71%	73%	82%
Bought or installed CFL bulbs	66%	63%	66%	58%
Routinely unplug chargers/electronics	62%	62%	55%	67%
Bought or installed LED bulbs	54%	52%	54%	44%
Bought an energy-efficient appliance	42%	38%	45%	48%
Added insulation/sealed leaks/ducts	31%	38%	35%	51%
Replaced a washer, refrigerator, freezer	29%	36%	30%	38%
Installed a programmable thermostat	28%	27%	34%	32%
Replaced windows or installed energy-efficient windows	22%	22%	24%	18%
Recycled an old or extra refrigerator	17%	24%	21%	29%
Installed a furnace, fireplace, heat pump, or water heater	21%	20%	25%	25%
Conducted an energy audit yourself	18%	17%	18%	16%
Had a professional energy audit	9%	11%	11%	0%
Added a solar electric system or solar water heating system	7%	2%	5%	5%

*\*Small group size, results directional*

- Usage of CFL bulbs has shown no significant change since last year, while LED use has increased significantly.
  - ✓ Currently, 82% have CFLs in their homes, and 44% have LEDs.
    - In 2012, 84% reported using CFLs and 19% reported using LED bulbs.
    - In 2011, 86% reported using CFLs and 21% reported using LED bulbs.

**Number of CFLs in Home**



## **Energy Trust's Brand Image**

### **Familiarity**

- Just over half of residents (51%) indicate that they are familiar with Energy Trust while 48% say they know nothing at all about it, indicating that there is work to be done to boost awareness.
  - ✓ Just 7% say they know "a great deal" about Energy Trust, and 25% say they know "some but not a lot"
  - ✓ *This data reflects a change in how awareness was measured last year. The 2012 awareness number was calculated from the percent who mentioned Energy Trust as an organization they would recommend for information on saving energy, plus those who indicated they had heard of it (among those who did not mention Energy Trust as an organization they would recommend). In 2013, we asked how much they know about Energy Trust.*
  
- Among the Primary Target group, who have not participated in an Energy Trust service in the past but say they will next year, 49% are familiar with Energy Trust, including 29% who know a great deal or some about it.
  
- Familiarity with Energy Trust varies significantly by region as well as housing characteristics.
  - ✓ Customers of Cascade Natural Gas are significantly less familiar with Energy Trust than others, as are renters and those under age 35.

**Percent Familiar with Energy Trust, by Group**

	<b>Group</b>	<b>Percent Familiar with Energy Trust</b>
	Total	51%
Region	Metro PDX	59%
	Willamette V./North Coast	46%
	South	48%
	East	41%
Utility	PGE	57%
	Pacific Power	48%
	NW Natural	60%
	Cascade Natural Gas	38%
Age	18-34	35%
	35-64	59%
	65+	46%
Home Ownership	Owners	60%
	Renters	33%
Key Groups	Loyalists	89%
	Primary	49%
	Retention	87%
	Hard to Reach	34%

- Residents are quite familiar with their energy utilities through their routine monthly relationship.
  - ✓ PGE in particular has forged a close relationship with its customers, as 46% of its customers say they know a great deal about it.
  - ✓ The link between other utilities in the area and their customers tends to be somewhat less formed.
    - Pacific Power: 34% of its customers say they know a great deal about it.
    - NW Natural: 34% of its customers say they know a great deal.
    - Cascade Natural Gas: 30% of its customers say they know a great deal.
- Meanwhile, the relationship with Energy Trust is formed more through circumstances that cause one to be in the market for energy efficiency solutions.
  - ✓ Among those who have never participated in an Energy Trust solution, 40% are familiar and just 3% say they know a great deal.
- Among residents across the region, there is little top-of-mind awareness of Energy Trust as an organization that offers incentives to save energy or use renewable energy.
  - ✓ This represents a change from the way the question was asked in 2012. In that study, participants were prompted with names of organizations; in 2013, the question was open-ended with no prompts.
- On an open-ended basis, just 9% identify Energy Trust as an organization in their area that offers incentives to help them save energy or use renewable energy at home.
  - ✓ 33% don't believe any organizations offer such incentives, and another 17% are unable to name any.
    - 41% of renters don't think there are any organizations that offer such incentives, whereas only 28% of homeowners don't think there are any.
- Even among those familiar with Energy Trust or those who have used its services in the past, the organization is not sticking in their minds as a source of incentives.
  - ✓ Among those familiar with Energy Trust, 16% recalled it on an open-ended basis.
  - ✓ Among verified participants, recall was the same as among nonparticipants (8%).
  - ✓ Among those who have used Energy Trust resources in the past, 19% cited it.
  - ✓ And among homeowners, 11% cited Energy Trust, compared with 5% of renters.
- Echoing this, 36% of those who are familiar with Energy Trust were unable to name any specific services or incentives Energy Trust offers top of mind, even in broad terms.
  - ✓ 22% know it offers incentives and rebates for energy efficiency.
  - ✓ 13% know it teaches people how to be more energy efficient or save energy.
  - ✓ 5% know it does home energy audits.
  - ✓ 5% know it helps trade in old appliances.
- Once prompted with specific options, more than half of those familiar recalled that Energy Trust offers incentives for energy-efficient appliances, heating systems and appliance recycling, as well as offering home energy audits.

- ✓ Among the Primary Target group, a slim majority of those familiar know that Energy Trust offers incentives for purchasing energy-efficient appliances; fewer than half could name any other programs or incentives.

**Percent That Believe Energy Trust Offers Service/Incentive  
(among those familiar with Energy Trust)**

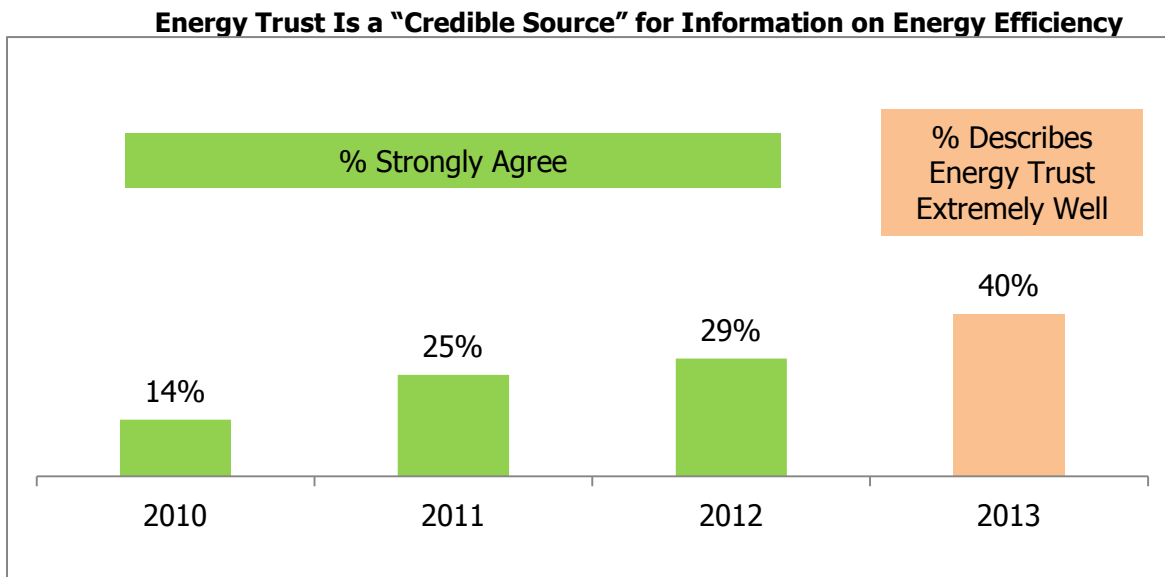
<i><u>Energy Trust Offers:</u></i>	<u>Overall</u>	<u>Primary Target Group</u>
Cash incentives for purchasing efficient appliances	57%	52%
Cash incentives for installing efficient heating systems or hot water heaters	57%	43%
Home energy audits	53%	42%
Cash incentives for refrigerator recycling	52%	40%
Energy saver kits	51%	43%
Cash incentives to insulate/seal leaks	47%	39%
Cash incentives for solar installation	42%	38%

*Favorability*

- Among those who know Energy Trust, the brand is well-liked and respected.
  - ✓ 65% of those familiar have a favorable view of Energy Trust, including 33% who have a very favorable view.
    - 30% are unable to offer an opinion.
- Residents who have participated in an Energy Trust program are particularly positive, as 83% have a favorable view, including 55% who are very favorable.
- Tracking the trend in familiarity, customers of PGE and NW Natural are more favorable to Energy Trust than customers of Pacific Power. There were too few Cascade Natural Gas customers familiar with the organization to get an accurate read on its favorability.
  - ✓ PGE customers: 39% very favorable view of Energy Trust.
  - ✓ NW Natural customers: 37% very favorable.
  - ✓ Pacific Power: 28% very favorable.
- Those who are familiar with Energy Trust and recall having seen its advertisements have a more positive image of the organization than those who did not recall seeing an ad.
  - ✓ Among those who saw an ad: 73% favorable, including 37% very favorable.
  - ✓ Among those who did not see an ad: 60% favorable, including 30% very favorable.

## Brand Attributes

- Energy Trust is widely respected by those who know it.
  - ✓ *Is a credible information source for Oregon residents to learn about energy efficiency and renewable energy.* 59% of those familiar say this describes Energy Trust well, including 40% who say it describes it very well.
    - In previous years, respondents were asked how strongly they agreed or disagreed with the statement on a 5 point scale. Tracking data is shown in the chart below.
  - ✓ *Is an organization you trust.* 52% say this describes Energy Trust well, including 32% who say the statement describes it very well.



- Yet while Energy Trust is seen as a credible source of information, it is not necessarily seen as the *best* source, particularly among the Primary Target group Energy Trust wants to engage.
  - ✓ 31% say “is the best source” describes Energy Trust well overall; only 24% of the Primary Target group says the statement describes Energy Trust well.
- And while those familiar understand the positive role Energy Trust plays, they are less sure of the specific benefits, rating the more specific attributes lower than the bigger-picture attributes.

**Percent Saying Statement Describes Energy Trust Well (4 or 5 on 5-point scale)  
Among those Familiar with Energy Trust**

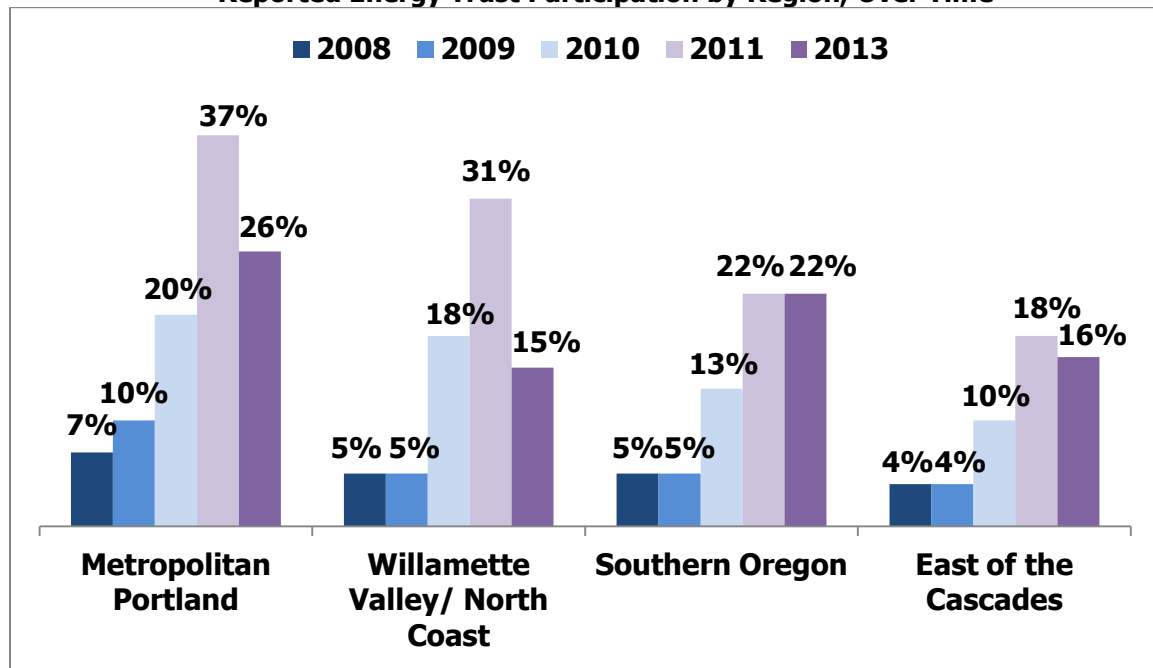
<i>Statement</i>	<b>Overall</b>	<b>Primary Target Group</b>
Is a <u>credible</u> information source for Oregon residents to learn about energy efficiency and renewable energy	59%	57%
Is an organization you trust	52%	45%
Makes it easier for you to make your home more energy efficient	47%	40%
Provides services and offers that are relevant to you	46%	47%
Serves the residents of Oregon well in their efforts to increase energy efficiency and reduce energy consumption	45%	34%
Understands the obstacles people face in trying to make their home more energy efficient	44%	40%
Makes energy efficiency more affordable for you	43%	41%
Saves you money and energy	39%	29%
Makes it more affordable for you to make your home more energy efficient	38%	27%
Is the <u>best</u> source for information on energy efficiency and renewable energy	31%	24%

**Energy Trust Service Assessment**

- Self-reported participation in Energy Trust services or incentives among all residents has held steady from last year, at 21%.
  - ✓ The reported participation rate among those who are aware of the organization is also about the same as last year, at 36%; in 2012, 34% reported participating.
- Residents from the Metropolitan Portland region have the highest reported participation rate, followed by those in the southern region.
- Self-reported participation in the Metropolitan Portland Region and the Willamette Valley has dropped relative to the 2011 study, but follows the pattern of growth from the 2008 to 2010 surveys.
  - ✓ Methodological differences in the surveys may have played a role in the differences seen below.



**Reported Energy Trust Participation by Region, Over Time**



- Participants were mostly homeowners living in single-family residences, with larger homes (>1,500 square feet) and gas heat (for both space and water heating).
  - ✓ They also had higher incomes and more education than residents at large.
- To gain an informed read on likely future participation, all respondents heard a short statement about Energy Trust and the services it provides.

*Energy Trust of Oregon provides cash incentives, information, and services to help customers of Portland General Electric, Pacific Power, NW Natural, and Cascade Natural Gas save energy and manage costs in homes and businesses, as well as take advantage of renewable energy options. Some examples include energy audits, cash incentives for home weatherization and purchasing energy-efficient appliances, and free energy saver kits that include light bulbs and other energy saving devices.*

- After hearing this description, 51% of residents said they are likely to participate in an Energy Trust program in the next year.
  - ✓ However, just 16% say they are “very likely,” indicating that many of those who would consider participating may need more information or a push to participate.
  - ✓ Those who engaged with Energy Trust in the past want to participate again; 58% say they are likely to do so, including 23% who say they are very likely.

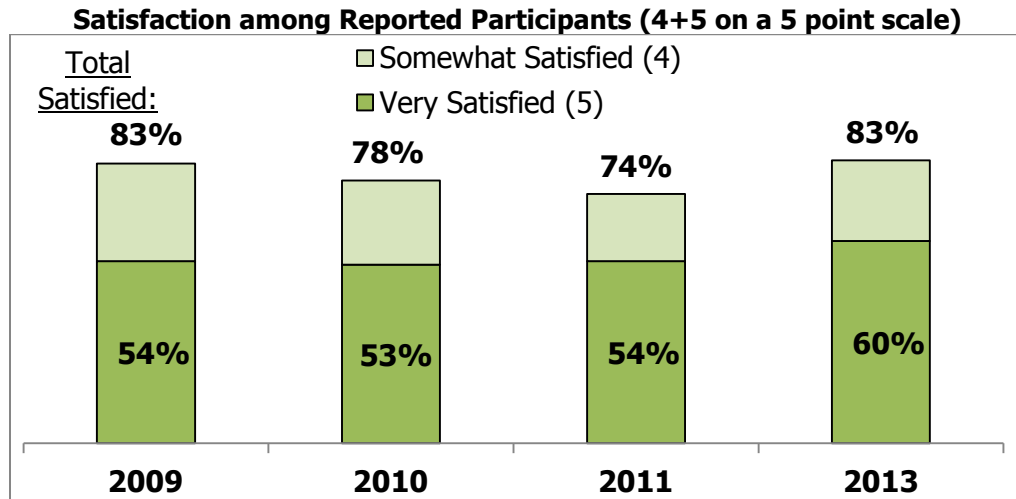
### Energy Trust Services

- The majority of those who participated with Energy Trust in the past year did so for a cash incentive or rebate after purchasing an efficient appliance.
  - ✓ 74% of participants received a cash incentive or rebate
- Many participants received more than one service or incentive; 43% received only one, while 25% received two and 21% received three or more. The remaining 11% of participants were unsure of the service they received, or said they received a service other than those listed in the survey.
  - ✓ Energy Saver Kits usually accompanied another service or incentive; only 8% of those receiving services received an Energy Saver Kit alone.
- Those who received an Energy Saver Kit want to continue to participate in Energy Trust programs, with 69% saying they would participate again in the future, compared with 50% of participants who received incentives other than Energy Saver Kits.
  - ✓ The Retention group, while receiving rebates at nearly the same rate as those in the Loyalist group, was much less likely to have received an Energy Saver Kit.

#### **Energy Trust Services or Incentives Used**

Received from Energy Trust:	Overall	Loyalist Group	Retention Group
A check after purchasing an efficient appliance such as a clothes washer, refrigerator, or freezer	55%	58%	52%
An energy saver kit that contains light bulbs, a shower head, and other water saving devices	37%	44%	27%
A check after recycling an old refrigerator or freezer	24%	25%	22%
A check after installing an efficient heating system or water heater	19%	21%	17%
A home energy audit or home energy review	17%	18%	14%
A check after installing insulation or sealing air leaks	10%	11%	10%
A check after installing a solar electric system or solar hot water system	5%	4%	6%

- Those who participated in an Energy Trust program were extremely satisfied with their experience.
  - ✓ 83% were satisfied (4+5 on a 5 point scale) and just 3% were unsatisfied
    - 60% were very satisfied, a boost in positive intensity since previous studies.



- Nearly 40% of participants indicated they are not likely to participate again; however, with satisfaction rates near 80%, it appears that their reluctance to participate again is not a reflection of dissatisfaction with the experience.

**Satisfaction with Energy Trust Experience**

	Loyalist Group	Retention Group
<b>Satisfied (4+5)</b>	87%	79%
<b>Neutral (3)</b>	10%	16%
<b>Not satisfied (1+2)</b>	3%	4%

- Satisfaction is largely driven by the timeliness of the incentives, and the convenience and reliability of the programs overall.
  - ✓ 24% of participants said that the main reason they were satisfied was because their incentive arrived quickly.
  - ✓ 16% reported the main reason they were satisfied was because Energy Trust had an easy and convenient process.
  - ✓ 16% reported the main reason they were satisfied was due to Energy Trust’s follow-through on its services.
  - ✓ 14% reported the main reason they were satisfied was because they saved money.

### Reported vs. Verified Participation

- In order to compare reported and actual participation rates, survey participants were asked for their street address; 47% of survey respondents gave an address that was complete enough to be matched.
- Among those who gave their address, 39% were verified as participants in an Energy Trust program, and 61% were verified as non-participants.
- There is some discrepancy between those who self-reported their participation, and those Energy Trust verified as participants.
  - ✓ Among those who reported participating, two-thirds were verified as actual participants.
  - ✓ And on the flip side, among those who said they did not participate, one-third were marked as participants.

**Reported vs. Actual Participation**

<i>Read Across</i>	<b>Verified as Participants</b>	<b>Verified as Non-Participants</b>
<b>Among those who reported participating...</b>	67%	33%
<b>Among those who reported not participating...</b>	33%	67%

- There were no major differences in demographics and housing type between those who self-reported participating in these programs and those who were verified.
  - ✓ Residents in the Metropolitan Portland region and customers of PGE tended to slightly over-report their participation in Energy Trust services.
- Nearly half of verified participants live in the Metropolitan Portland region, and they tend to be more middle-aged, with two-thirds between the ages of 35 and 64.
- 73% of verified participants own their homes, compared to 85% of reported participants who say they own their homes.
  - ✓ Three-quarters of verified participants live in single-family, detached homes.
  - ✓ 40% of verified participants live in homes smaller than 1500 square feet.

**Demographics of Reported vs. Verified Participants**

<i>Groups: Read Down</i>		Total Survey Respondents	Reported Participants	Verified Participants
Region	Metro PDX	44%	55%	47%
	Willamette Valley/ North Coast	31%	23%	33%
	South	13%	13%	10%
	East	12%	9%	9%
Utility	PGE	48%	58%	53%
	Pacific Power	39%	37%	40%
	NW Natural	47%	60%	57%
	Cascade Natural Gas	4%	2%	3%
Own/Rent	Owners	66%	85%	73%
	Renters	34%	15%	27%
Housing Type	Single-Family Detached	68%	85%	75%
	Single-Family Attached	5%	3%	4%
	Apt. or Condo	18%	6%	14%
	Manuf. or Mobile	6%	5%	7%
Size of Home	<1500 square feet	42%	28%	40%
	1500+ square feet	48%	66%	58%
Year Home Built	Before 1970	33%	34%	37%
	1970-1992	28%	32%	34%
	1993-2000	13%	13%	14%
	2001+	12%	15%	13%
Age	18-34	18%	10%	11%
	35-49	25%	26%	37%
	50-64	30%	39%	30%
	65+	26%	24%	22%

- Comparing the Energy Trust services verified participants said they received with those they actually received shows little difference in services or incentives used.

**Services and Incentives among Verified Participants**

Received from Energy Trust among Verified Participants:	What Participants Reported Receiving	What Participants Actually Received
A check after purchasing an efficient appliance such as a clothes washer, refrigerator, or freezer, or after recycling an old refrigerator or freezer	63%	65%
An energy saver kit that contains light bulbs, a shower head, and other water saving devices	45%	49%
A check after installing an efficient heating system or water heater	24%	24%
A home energy audit or home energy review	23%	24%
A check after installing insulation or sealing air leaks	13%	13%
A check after installing a solar electric system or solar hot water system	6%	8%



- Verified participants were extremely pleased with their experience, with 89% saying they were satisfied, including 65% who said they were very satisfied.
  - ✓ *Please note that the number of verified participants answering this question was small, and the data should be used for directional purposes only.*

Communication Channels

- Despite low familiarity overall, once they hear information about the organization and are prompted with specific communication channels, 63% of residents recall hearing about Energy Trust in the past year.
  - ✓ The Primary Target group recalls Energy Trust’s communications at the same rate as the population at large, and through the same channels.

**Ways Seen/Heard About Energy Trust in Past 12 Months**

	<u>Overall</u>	<u>Loyalist Group</u>	<u>Primary Target Group</u>	<u>Retention Group</u>
Bill Inserts	39%	66%	36%	66%
Word of Mouth	23%	38%	21%	34%
Traditional Media Ads (net)	40%	67%	38%	50%
<i>TV</i>	27%	37%	28%	31%
<i>Radio</i>	20%	37%	18%	29%
<i>Newspaper/Magazine</i>	16%	34%	15%	21%
Online (net)	27%	52%	28%	35%
<i>Online ads</i>	10%	21%	10%	8%
<i>Utility’s email newsletters</i>	13%	25%	12%	14%
<i>Social media</i>	4%	5%	4%	4%
<i>Utility’s website</i>	11%	19%	11%	18%
<i>Contractor’s website</i>	6%	18%	5%	8%
Haven’t Seen/Heard About Energy Trust in the Past Year	31%	3%	33%	7%

- While those who recall any Energy Trust communication have a higher desire to participate, it is particularly strong among those who recall seeing or hearing an ad online.
- In particular, residents who have encountered Energy Trust through a contractor’s website have the highest intention of participating.
  - ✓ While this is likely driven by a serious intent to act that brought them to the contractor’s website in the first place, it does strongly suggest that continuing to build and publicize relationships with contractors will reach the residents who are ready to participate.

**Participation Intent by Communication Channel**

Among those who heard about Energy Trust through...	Percent Likely to Participate in Energy Trust Program
Bill Inserts	57%
Word of Mouth	57%
Traditional Media Ads (net)	58%
Online (net)	64%
<i>Contractor's website</i>	<i>72%*</i>
Haven't Heard about Energy Trust in Past Year	43%

*\*Small group size, results directional*

- For the one in ten residents who reported hearing or seeing an online ad, 20% remember seeing it on their utility's website, and 11% recall it from a contractor's website.
  - ✓ 19% saw ads on a social media site, including 12% who reported seeing ads on Facebook.
  - ✓ 15% saw banner ads on a website.
  - ✓ 8% heard ads on Pandora.
  - ✓ 32% of those who said they saw an ad online could not remember where they saw it.
  
- These online ads are driving broad interest in learning more about Energy Trust, as 58% say the ad made them more interested in learning more about Energy Trust.
  - ✓ Yet that interest lacks significant intensity, as just 14% say it made them much more interested.
  
- Energy Trust's ads have been generally effective in their main message and takeaways.
  - ✓ Yet 22% of those who saw an Energy Trust ad were unable to cite the main message of the ad they saw.

**Main Message in Ads Seen (Open-End)**

	Total	Online	TV	Radio	Print
<b>How to be more energy efficient</b>	22%	27%	23%	23%	33%
<b>How to save money on energy use</b>	16%	26%	14%	21%	17%
<b>Incentives for/recycling old appliances</b>	18%	16%	22%	19%	13%

- Respondents would most prefer to receive information from Energy Trust via inserts in their utility bills or by postal mail.
  - ✓ One in three would prefer to engage with Energy Trust online, via email or seeking information from the Energy Trust website on their own.
    - There is very little interest in engaging over social media.

### Top Two Preferred Methods of Engaging with Energy Trust

	<u>Loyalist Group</u>	<u>Primary Target Group</u>	<u>Retention Group</u>	<u>Hard to Reach Group</u>
<b>Bill Insert</b>	62%	56%	61%	48%
<b>Postal Mail from Energy Trust</b>	47%	50%	44%	46%
<b>Email from Energy Trust</b>	31%	35%	20%	22%
<b>Energy Trust Website</b>	33%	26%	17%	19%
<b>Social Media</b>	5%	7%	5%	5%
<b>Don't Want Info</b>	7%	9%	19%	25%

### Messaging Nuances

- Residents respond best to the tangible, everyday benefits Energy Trust can provide; messages that focus too broadly on benefits outside the realm of day-to-day life just don't resonate as strongly for most residents.
- The prospect of cash incentives and keeping energy costs low is the most convincing reason for residents to participate in the next year; they work particularly well with the Primary Target group.
- The bigger-picture reasons to participate – like creating a clean energy economy or reducing carbon emissions – are less convincing as reasons to participate.

### Reasons to Participate in Energy Trust Services or Incentives

Percent saying each statement is a convincing reason to participate in an Energy Trust program (% very convincing/% total convincing)	Overall	Primary Target Group
Energy Trust's <b>cash incentives</b> help residential customers <b>lower their energy costs</b> , increase comfort, and improve the value of their home	41/78	45/90
By participating in an Energy Trust service, you are not only <b>saving money</b> , but also helping to reduce energy waste and <b>keep energy costs lower</b> for everyone	36/78	42/87
Energy Trust's information, services, and cash incentives have <b>saved participating customers more than \$1.3 billion</b> on their energy bills over the past decade	33/72	40/75
Energy Trust offers <b>low and no-cost ways</b> to reduce the amount of energy you use in your home, helping both homeowners and renters use less energy	31/75	33/85
Energy Trust works for the greater good of all Oregonians by <b>reducing energy waste</b> and helping <b>keep energy costs as low</b> as possible	31/72	40/81
Energy Trust's services and incentives help <b>reduce carbon emissions</b> in the region, creating a more <b>sustainable energy future</b> for Oregon	29/66	35/78
Energy Trust's investments help create jobs and wages, and build Oregon's <b>clean energy economy</b>	27/70	32/78
Energy Trust only supports proven energy-saving solutions and has <b>a network of qualified contractors you can trust</b>	23/64	27/69





## Conclusions

### **Attitudes around Energy Efficiency and Energy Consumption**

- Oregon residents are committed to reducing the amount of energy they use in their homes, with 73% saying they have taken some actions in the past year to reduce their consumption, and 68% saying they are likely to take action over the next year.
- Once set on the path toward reducing their energy use, residents gain momentum for further actions.
  - ✓ Among those who took steps in the past year to reduce their energy use, 80% are likely to take further action next year, including 47% who are very likely.
- Driving action on this issue is a desire to save money, followed by improving the comfort of their home and a desire to stop wasting energy.
  - ✓ While protecting the environment is not a widespread incentive for action, it is highly motivating for a small slice (11%) of Oregonians.
    - Those most motivated by the environment are more likely to take actions in the next year, and have a stronger history of past participation with Energy Trust than others.
- Residents show a strong desire to avoid wasting anything, including energy. Highlighting this advantage of improved energy efficiency has the potential to drive action to a higher degree than saving money on its own.
  - ✓ 53% say that “I hate wasting anything, including the energy in my home” describes them a great deal; among that group, 51% say they are very likely to take steps to reduce their energy use.
  - ✓ 46% say that “When it comes to my energy use, the most important thing is reducing my bill” describes them a great deal; but among that group, just 41% are very likely to take steps.
- Concern about the amount of energy residents use in their homes is widespread but not intense.
  - ✓ 62% say they are concerned, yet just 18% are very concerned about it.
- Coupled with this low level of concern are several barriers standing in the way of taking action:
  - ✓ The belief that reducing energy use is difficult.
  - ✓ The belief that increasing energy efficiency is expensive.
  - ✓ The belief that their home is already very energy efficient.
- Energy Trust can leverage the desire to save money and reduce waste to overcome these obstacles.
  - ✓ The messages that were most convincing as reasons to use Energy Trust addressed both saving money and reducing energy waste.
    - These household-level messages resonated more strongly than broader-scale messages, such as those that talked about building a clean energy economy.

## **Energy Trust Brand Image**

- Familiarity with Energy Trust is moderate, with about half of residents saying they know something about the organization, and those who know the organization have a very positive view of it.
- With nearly half of Oregon residents unfamiliar with Energy Trust, there is significant room for Energy Trust to strengthen awareness of its brand.
  - ✓ 51% of residents are familiar with the organization (people who say they know a great deal, some, or not very much about Energy Trust); 48% say they know nothing at all.
    - Just 7% say they know “a great deal” about the organization.
- Energy Trust is not currently top-of-mind when residents think of resources available to help them reduce their home’s energy use.
  - ✓ Half of residents were unable to name any organizations that offer incentives to help residents save energy at home; among those who could, many named their utility providers.
  - ✓ In the 2012 study, respondents were asked to identify organizations they would recommend for information on ways to conserve energy and reduce costs, and prompted respondents with organization names. The question in the current 2013 study was open-ended with no prompts.
- Energy Trust is well-liked and trusted by those who are familiar with it, though even among that group, its image is relatively soft.
  - ✓ 65% of those familiar have a favorable view of the organization, including 33% very favorable; just 5% are unfavorable and 30% are unable to rate.
  - ✓ Personal experience solidifies that positive view: among those who report using an Energy Trust service, 83% are favorable, including 55% who are very favorable.
- Residents who are familiar with the organization have confidence in Energy Trust, even though they are not very well versed in the specific benefits of what Energy Trust offers.
  - ✓ 59% say that Energy Trust is “a credible information source for Oregon residents to learn about energy efficiency and renewable energy” (4 or 5 on 5-point scale)
  - ✓ 52% say that Energy Trust is “an organization [they] trust.”
  - ✓ But just 38% say that Energy Trust “makes it more affordable for you to make your home more energy efficient,” and 31% say Energy Trust “is the best source for information on energy efficiency and renewable energy.”
  - ✓ Between 16% and 22% of residents were unsure how to rate Energy Trust on attributes.

## **Energy Trust Service Assessment**

- One in five residents reports participating in an Energy Trust service, rebate or incentive; this matches the reported participation rate in the 2012 study.
- A slim majority (51%) of residents say they are likely to participate in an Energy Trust service or incentive in the next year.
  - ✓ But with just 16% saying they are very likely to do so, boosting participation will take some persuasion – that they can and should take steps to improve their home’s energy efficiency, and that they should take advantage of Energy Trust to do so.
    - An increase in engagement with customers at key decision-making points could increase intensity on this measure as well.
- Those who have participated in an Energy Trust service or rebate have been extremely satisfied with their experience, with 60% saying they were very satisfied and 58% likely to participate again.
- Energy Trust’s current advertisements are penetrating and boosting its image.
  - ✓ More than four in ten residents have seen or heard advertising for Energy Trust.
  - ✓ Of those who have seen an ad, 73% are favorable to Energy Trust, compared to 60% favorable among those who have not seen or heard an ad.
  - ✓ The main message of the advertising is sinking in: how to be more energy efficient, how to save money, and how to receive rebates.
- Though only 10% indicated they had seen or heard an online advertisement, these ads are driving interest in Energy Trust, with 58% saying the ads made them more interested in learning more about the organization.

## Energy Trust of Oregon 2013 Residential Awareness and Perceptions Study Topline Data



July 2-23, 2013

850 adults in Energy Trust of Oregon's service area, who have at least some responsibility for making decisions about utilities in their house and paying the electric bill, and are customers of PGE, Pacific Power, NW Natural, or Cascade Natural Gas including an oversample of 50 interviews with Cascade Natural Gas customers who meet the previous criteria. The following represents weighted data.

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Q1. Are you 18 years of age or older and a current resident of Oregon?

Yes	100%
No	0%
Don't know/refused	0%

Q2. What county do you live in? (*Open End – Showing NET Regions*)

Portland Metro	44%
Willamette Valley/North Coast	31%
Southern Oregon	13%
East of the Cascades	12%

Q3. How much responsibility do you have for paying your household's energy bills or buying new appliances?

All of the responsibility	65%
Some of the responsibility	35%
None of the responsibility	0%
Don't receive energy bills	0%
Don't know	0%

Q4. Are you, or is anyone in your household, employed by an electric or gas utility company?

Yes	0%
No	100%
Don't know	0%

Q5. Do you own or rent your home?

Own	66%
Rent	34%
Neither	0%
Don't know	0%

Q6. What is the name of your electric utility?

P.G.E., or Portland General Electric	48%
Pacific Power	39%
EWEB, or Eugene Water & Electric Board	5%
Other	8%
Don't know	0%

Q7. What is the name of your gas utility?

Northwest Natural	47%
Cascade Natural Gas	4%
Avista	5%
Don't use natural gas	38%
Other	2%
Don't know	3%

## **Key Metrics and Awareness**

Q8. As far as you know, do any organizations in your area offer incentives to help you save energy or use renewable energy at home? (*Open End*)

No	33%
Energy Trust of Oregon	9%
P.G.E., or Portland General Electric	22%
Pacific Power	13%
Northwest Natural	12%
EWEB, or Eugene Water & Electric Board	4%
Energy Star	3%
Avista	2%
Federal government	2%
Oregon state government, or Oregon Department of Energy	2%
Local government/my town	2%
Cascade Natural Gas	1%
Clean Energy Works Oregon, or C.E.W.O.	1%
Other	2%
Don't know	17%



Now, I am going to read you the names of some organizations, companies, and programs involved in energy and energy efficiency. For each one, please tell me whether you know a great deal about them, some but not a lot, not very much, or nothing at all.

*Respondents were only asked their familiarity with Energy Trust of Oregon, Energy Star, and their own gas and electric utilities*

	Great Deal	Some, Not A Lot	Not Very Much	Nothing At All	Don't Know	Great Deal+ Some	Not Much + Nothing
Q11. P.G.E., or Portland General Electric	46%	44%	7%	3%	0%	89%	10%
Q12. Pacific Power	34%	46%	14%	5%	1%	80%	20%
Q13. Northwest Natural	34%	48%	12%	5%	0%	82%	17%
Q14. Cascade Natural Gas	30%	51%	14%	5%	0%	81%	19%
Q10. Energy Star	8%	36%	14%	41%	1%	44%	55%
Q9. Energy Trust of Oregon	7%	25%	19%	48%	1%	33%	66%

Now you will hear some of the same names, and this time, please tell me if you have a favorable or unfavorable view of them.

Do you have a very favorable view of it, somewhat favorable, somewhat unfavorable, or very unfavorable view of it?

*Asked of those who said they were aware of Energy Star or Energy Trust of Oregon in Q9 or Q10*

	Very Fav	Smwt Fav	Smwt Unfav	Very Unfav	Never Heard Of	Heard Of/ No Opinion	Don't Know	Total Fav	Total Unfav	Total DK
Q16. Energy Star	33%	45%	2%	1%	15%	1%	3%	78%	3%	19%
Q15. Energy Trust of Oregon	33%	32%	4%	2%	19%	4%	7%	65%	5%	30%



Q17. Would you say that currently, your home is:

Very energy efficient	22%
Somewhat energy efficient	55%
Not very energy efficient	14%
Not energy efficient at all	8%
Don't know	1%
ENERGY EFFICIENT	77%
NOT ENERGY EFFICIENT	22%

Q18. Some people take steps to reduce the amount of energy they use in their homes, and others do not. How about you? Have you taken any steps in the past 12 months to reduce the amount of energy you use in your home?

Yes	73%
No	27%
Don't know	0%

Q19. How likely are you to take steps to reduce your household's energy consumption in the next 12 months? Are you:

Very likely	38%
Somewhat likely	31%
Not very likely	18%
Not at all likely	12%
Don't know	2%
LIKELY	68%
NOT LIKELY	30%



Q20. Thinking about the total amount of energy consumed in your home, would you say you are:

Very concerned	18%
Somewhat concerned	44%
Not very concerned	28%
Not concerned at all	10%
Don't know	0%
CONCERNED	62%
NOT CONCERNED	38%

Q21. Would reducing the amount of energy you use in your home be:

Very easy	6%
Somewhat easy	34%
Somewhat difficult	47%
Very difficult	11%
Don't know	2%
EASY	40%
DIFFICULT	58%

Q22. Would making your home more energy efficient be:

Too expensive	34%
Expensive, but worth it	23%
Affordable	21%
Inexpensive	3%
Don't know	19%
EXPENSIVE	57%
AFFORDABLE/INEXPENSIVE	24%

Q23. Would using renewable energy in your home be:

Too expensive	36%
Expensive, but worth it	26%
Affordable	13%
Inexpensive	3%
Don't know	21%
EXPENSIVE	62%
AFFORDABLE/INEXPENSIVE	17%

Q24. When it comes to the energy you use in your home, which of the following is most important to you?

Not wasting energy	24%
Saving money	37%
Protecting the environment	11%
The comfort of your home	26%
Don't know	2%

## **Dynamics of the Energy Efficiency Landscape**

Next, I'm going to read you some statements people might make about the energy they use in their homes. Please tell me how well each statement describes you personally.

Does this describe you a great deal, some but not a lot, not very much, or not at all.

	<b>Great Deal</b>	<b>Some, Not A Lot</b>	<b>Not Very Much</b>	<b>Not At All</b>	<b>Don't Know</b>	<b>Great Deal+ Some</b>	<b>Not Much + Not At All</b>
Q25. I hate wasting anything, including the energy in my home.	53%	37%	6%	3%	1%	90%	9%
Q26. When it comes to my energy use, the most important thing is reducing my bill.	46%	37%	12%	4%	1%	83%	16%
Q27. It's important to me that we reduce dependence on fossil fuels.	46%	29%	6%	17%	1%	76%	23%
Q29. When it comes to reducing my energy consumption, I know exactly what steps I should be taking.	37%	43%	11%	8%	1%	80%	19%
Q28. I want to make my home more energy efficient but I just can't afford it.	35%	31%	13%	19%	2%	66%	32%
Q32. I think new energy efficient products like L.E.D. lights aren't any better than C.F.L.'s and aren't worth the upfront cost.	19%	20%	12%	42%	6%	39%	55%
Q30. Reducing the amount of energy I use in my home will make my home less comfortable for me and my family.	12%	23%	26%	38%	1%	35%	64%
Q31. I think energy efficient products are just another way for people to make money by charging more.	9%	26%	22%	41%	3%	35%	63%



## **Energy Trust: Brand Image**

Now, I'd like to ask you a few questions about Energy Trust of Oregon.

Q33. To the best of your knowledge, what does Energy Trust offer? (*Open End*)

Incentives they offer for energy efficiency	6%
They teach people how to be more energy efficient	5%
Rebates they offer for energy efficiency	4%
They do a home energy review/audit	3%
Trade in old appliances	2%
They help people save energy	2%
Home energy savings	2%
Rebates on energy efficient appliances	2%
They offer tax credits/tax incentives	2%
They install energy efficient light bulbs in your home	1%
How to use solar power	1%
How to weatherize your home	1%
Incentives to use wind energy	1%
They offer energy efficient appliances	1%
Other	4%
Don't know/refused	64%

Q34. Now I am going to read you a list of incentives or services that an organization could offer to help residents use less energy in their homes. For each one I read, please tell me whether you believe that Energy Trust provides that incentive or service to Oregon residents.

Provides home energy audits (also known as "home energy reviews" or "home energy profiles")	35%
Offers cash incentives to residents who purchase more energy efficient refrigerators, freezers, and clothes washers	39%
Offers cash incentives to residents who install more energy efficient heating systems or water heaters	40%
Offers cash incentives to residents who install insulation or seal air leaks	34%
Offers cash incentives to residents who install solar electric systems or solar hot water systems	28%
Offers cash incentives to have old refrigerators or freezers recycled	37%
Provides energy saver kits that contain light bulbs, a shower head and other water saving devices	40%
None of the above	12%
Don't know	29%

Asked of those who said they were aware of Energy Trust of Oregon in Q9

Now I'm going to read you a list of statements people might make about an organization. For each one, please tell me how well you think it describes Energy Trust of Oregon.

	1 – Does Not Describe At All	2	3	4	5 – Describes Extremely Well	Don't Know	NET 1-2	NET 4-5
Q41. Is a credible information source for Oregon residents to learn about energy efficiency and renewable energy	3%	6%	16%	18%	40%	17%	9%	59%
Q35. Is an organization you trust	5%	5%	19%	20%	32%	19%	9%	52%
Q43. Makes it easier for you to make your home more energy efficient	4%	4%	26%	23%	24%	18%	8%	47%
Q39. Provides services and offers that are relevant to you	5%	11%	23%	23%	23%	16%	15%	46%
Q36. Serves the residents of Oregon well in their efforts to increase energy efficiency and reduce energy consumption	7%	3%	27%	25%	20%	18%	10%	45%
Q38. Saves you money and energy	6%	9%	30%	19%	20%	17%	15%	39%
Q37. Makes energy efficiency more affordable for you	6%	9%	24%	23%	19%	18%	15%	43%
Q44. Makes it more affordable for you to make your home more energy efficient	4%	11%	31%	19%	19%	16%	15%	38%
Q42. Understands the obstacles people face in trying to make their home more energy efficient	4%	8%	25%	26%	18%	19%	12%	44%
Q40. Is the best source for information on energy efficiency and renewable energy	6%	11%	31%	18%	13%	22%	17%	31%

## **Energy Efficiency Behaviors**

*Asked of those who said they have taken steps to reduce the amount of energy they use in their homes in the past year in Q18*

Q45. You mentioned that you have taken steps to reduce the amount of energy you use in your home. Which of the following actions have you taken in the past 12 months to reduce the amount of energy you use in your home?

Conducted a home energy audit yourself	18%
Had a professional conduct a home energy audit	10%
Installed a furnace, fireplace, heat pump, or water heater	21%
Added insulation or sealed leaks or ducts	35%
Replaced windows or installed energy efficient windows	22%
Replaced a clothes washer, refrigerator, or freezer	34%
Recycled an old or extra refrigerator	22%
Added a solar electric system or solar water heating system	4%
Bought or installed compact fluorescent light, or C.F.L., bulbs	63%
Bought or installed L.E.D. bulbs	53%
Bought an energy efficient or Energy Star appliance	42%
Routinely unplugged chargers or electronics	61%
Installed a programmable thermostat	28%
Routinely turned down the thermostat	71%
None	2%
Other	2%
Don't know	1%



*Asked of those who said they are likely to take steps to reduce their household's energy consumption in the next year in Q19*

Q46. You mentioned that you plan to take steps in the next 12 months to reduce the amount of energy you use in your home. Now I am going to read a list of actions that people could take to reduce the amount of energy that they use in their homes. For each one, please tell me whether you plan to take that action in the next 12 months. You may tell me all that apply.

Conduct a home energy audit yourself	27%
Have a professional conduct a home energy audit	11%
Install a furnace, fireplace, heat pump, or water heater	13%
Add insulation or seal leaks or ducts	31%
Replace windows or install energy efficient windows	16%
Replace a clothes washer, refrigerator, or freezer	19%
Recycle an old or extra refrigerator	16%
Add a solar electric system or solar water heating system	5%
Buy or install compact fluorescent light, C.F.L., bulbs	45%
Buy or install L.E.D. bulbs	44%
Buy an energy efficient or Energy Star appliance	31%
Routinely unplug chargers or electronics	63%
Install a programmable thermostat	12%
Routinely turn down the thermostat	63%
None	7%
Other	3%
Don't know	3%



Number of Bulbs	0	1-5	6-10	11-20	20+	Don't know	Net 1-10	Net 10+
Q47. Do you have any types of <u>compact fluorescent light bulbs</u> , sometimes called twisty bulbs, in your home?	15%	26%	30%	18%	8%	3%	55%	26%
IF YES: Approximately how many of these bulbs do you have installed in your home?								
Q48. Are you using any <u>LED light bulbs</u> in your home? Please think about regular size light bulbs, not night lights, Christmas lights or other decorative bulbs.	51%	29%	10%	4%	1%	4%	39%	6%
IF YES: Approximately how many of these bulbs do you have installed in your home?								

## **Engagement With Energy Trust**

Q49. Have you ever received any services, rebates, or incentives from Energy Trust?

Yes	21%
No	74%
Don't know	5%

*Asked of those who said they have received services, rebates, or incentives from Energy Trust in Q49*

Q50. Which of the following types of services or incentives have you received from Energy Trust?  
Please tell me all that apply.

A home energy audit or home energy review	17%
A check from Energy Trust after purchasing an efficient appliance such as a clothes washer, refrigerator, or freezer	58%
A check from Energy Trust after installing an efficient heating system or water heater	20%
A check from Energy Trust after installing insulation or sealing air leaks	11%
A check from Energy Trust after installing a solar electric system or solar hot water system	5%
A check from Energy Trust after recycling an old refrigerator or freezer	25%
An energy saver kit from Energy Trust that contains light bulbs, a shower head, and other water saving devices	39%
Other	10%
Don't know	0%



*Asked of those who said they have received services, rebates, or incentives in Q50*

Q51. How satisfied were you with your experience with Energy Trust? Please use a scale of 1 to 5, where 5 means you were very satisfied with your experience with Energy Trust, and 1 means you were not at all satisfied with your experience. You may use any number from 1 to 5.

1 Not at all satisfied	1%
2	2%
3	13%
4	24%
5 Very satisfied	60%
Don't know	1%
NET 1-2	3%
NET 4-5	83%

*Asked of those who were satisfied with their experience with Energy Trust (4 or 5 in Q51)*

Q52. What was the main reason you were satisfied with the service or incentive you received from Energy Trust? Please be as specific as possible. *(Open End)*

Rebate arrived quickly	24%
Easy/convenient process	16%
They did a good job/did what they promised to do	16%
They saved me money	14%
They were polite/good communication	9%
They provided good information	4%
They take away old appliances	4%
Helped us to be more energy efficient	3%
They replace old light bulbs	3%
They did an energy audit on my home	2%
Other	6%
Don't know/refused	0%



Asked of those who were not satisfied with their experience with Energy Trust (1 or 2 in Q51)

Q53. What was the main reason you were not satisfied with the service or incentive you received from Energy Trust? Please be as specific as possible. (Open End)

They didn't show up when they were supposed to	37%
They didn't do what they said they would	33%
It ended up costing me more	11%
Didn't get my rebate when promised	10%
Other	0%
Don't know/refused	10%

Q54. Now I am going to read you a little more about Energy Trust of Oregon, and get your opinion.

Energy Trust of Oregon provides cash incentives, information, and services to help customers of Portland General Electric, Pacific Power, Northwest Natural, and Cascade Natural Gas save energy and manage costs in homes and businesses, as well as take advantage of renewable energy options. Some examples include energy audits, cash incentives for home weatherization and purchasing energy efficient appliances, and free energy saver kits that include light bulbs and other energy saving devices.

In the next 12 months, how likely are you to participate in Energy Trust services or incentives like the ones I just mentioned? Are you:

Very likely	16%
Somewhat likely	36%
Not very likely	23%
Not at all likely	19%
Don't know	6%
LIKELY	51%
NOT LIKELY	43%

Now I am going to read you a little bit more about Energy Trust. For each statement I read, please tell me how convincing a reason it is for you to participate in Energy Trust services or incentives in the next 12 months.

Is this a very convincing reason for you to participate in Energy Trust services or incentives in the next 12 months, somewhat convincing, not very convincing, or not convincing at all?

	Very Conv	Smwt Conv	Not Very Conv	Not At All Conv	Don't Know	TOTAL CONV	TOTAL NOT CONV
Q57. Energy Trust's cash incentives help residential customers lower their energy costs, increase comfort, and improve the value of their home	41%	37%	9%	8%	5%	78%	17%
Q59. By participating in an Energy Trust service, you are not only saving money, but also helping to reduce energy waste and keep energy costs lower for everyone	36%	41%	9%	9%	4%	78%	19%
Q55. Energy Trust's information, services, and cash incentives have saved participating customers more than 1.3 billion dollars on their energy bills over the past decade	33%	39%	11%	11%	6%	72%	21%
Q56. Energy Trust offers low and no-cost ways to reduce the amount of energy you use in your home, helping both homeowners and renters use less energy	31%	44%	7%	9%	8%	75%	17%
Q60. Energy Trust works for the greater good of all Oregonians by reducing energy waste and helping keep energy costs as low as possible	31%	41%	9%	11%	7%	72%	20%
Q58. Energy Trust's services and incentives help reduce carbon emissions in the region, creating a more sustainable energy future for Oregon	29%	37%	12%	13%	9%	66%	25%
Q61. Energy Trust's investments help create jobs and wages, and build Oregon's clean energy economy	27%	43%	14%	11%	6%	70%	24%
Q62. Energy Trust only supports proven energy saving solutions and has a network of qualified contractors you can trust	23%	41%	12%	12%	12%	64%	24%



Q63. Now I am going to read you some ways people could hear about Energy Trust. For each one I read, please tell me whether you have seen or heard about Energy Trust in that way in the past 12 months.

Through word of mouth	23%
On social media like Facebook or Twitter	4%
Email newsletters from your utility company	13%
Inserts in your electric or gas utility bill	39%
Advertisements you saw or heard online	10%
Advertisements you saw on T.V.	27%
Advertisements you heard on the radio	20%
Advertisements you saw in a magazine or newspaper	16%
On a contractor's website	6%
On your utility company's website	11%
Have not heard about them in past 12 months	31%
Other	2%
Don't know	6%
ONLINE	27%
ADS	42%

Asked of those who said they heard about Energy Trust from an advertisement in Q63

Q64. What was the main message of the advertisements you saw for Energy Trust? (Open End)

How to be more energy efficient	22%
How to save money on energy use	16%
Recycling appliances	6%
Rebates for old appliances	12%
Ways to reduce my carbon footprint	2%
Ways to use renewable energy sources	2%
How to get/use energy saving appliances	3%
They audit your home for energy efficiency	3%
How to weatherize/insulate for winter	1%
Information in my energy bill	1%
How they help people	1%
Who they are/name of the company	2%
Other	6%
Don't know/refused	22%

*Asked of those who said they heard about Energy Trust from an online advertisement in Q63*

Q65. Where did you see or hear an online ad or referral for Energy Trust? Please tell me all the places that you have seen or heard an ad or referral for Energy Trust online. *(Open End)*

PROBE: Anywhere else?

On an online radio station, like Pandora	8%
On the side, top, or bottom of a webpage	15%
On Facebook	12%
On Twitter	5%
On another social media site	8%
On a contractor's website	11%
On a utility's website	20%
On a mobile app	0%
On another website	6%
Other	7%
Google	7%
Energy bill insert	3%
Newspaper	1%
Don't know	32%

*Asked of those who said they heard about Energy Trust from an online advertisement in Q63*

Q66. And when you saw or heard that online ad for Energy Trust, did it make you:

Much more interested in learning more about Energy Trust	14%
Somewhat more interested	44%
Somewhat less interested	9%
Much less interested in learning more about Energy Trust	8%
Don't know	25%
MORE INTERESTED	58%
LESS INTERESTED	17%





Q67. There are many ways Energy Trust could communicate with Oregon residents like you. For you personally, how would you MOST prefer to receive information from Energy Trust?

Receive an email from Energy Trust	14%
Receive postal mail from Energy Trust	26%
Receive an insert in your electric or gas bill	33%
Follow them on Facebook, Twitter or other social media	2%
Visit Energy Trust's website	11%
Don't want to receive information	9%
Other	3%
Don't know	2%

*Asked of those willing to receive information from Energy Trust*

Q68. And after that, how would you next prefer to receive information from Energy Trust?

Receive an email from Energy Trust	17%
Receive postal mail from Energy Trust	24%
Receive an insert in your electric or gas bill	23%
Follow them on Facebook, Twitter or other social media	4%
Visit Energy Trust's website	14%
Don't want to receive information	7%
Other	4%
Don't know	6%



Q69. Now I am going to read you a list of some local organizations that Energy Trust could partner with to offer information or services to residents like you. Which of the following would you be interested in hearing from about information or services that Energy Trust offers? Please tell me all that apply.

Local community colleges or universities	25%
Businesses in your area	36%
Your place of worship	11%
Your local library	32%
Schools in your area	24%
Your local government	27%
Chamber of commerce	22%
Your local water utility	44%
Other	2%
None of the above	20%
Don't know	7%

## **Demographics**

Thank you for your time and participation so far. We're nearly done. I have just a few final questions for statistical purposes only.

Q70. Age (*Based on open end question: What year were you born?*)

18-24	4%
25-34	14%
35-44	17%
45-54	21%
55-64	20%
65-74	14%
75+	10%

Q71. What type of home do you live in?

Single-family detached house	68%
Single-family attached house (such as a townhouse)	5%
Duplex, triplex, or fourplex	4%
Apartment or condominium with 5 units or more	14%
Manufactured or mobile home	6%
Other	1%
Don't know	2%

Q72. What year was your home built?

Before 1970	33%
1970-1979	16%
1980-1986	7%
1987-1992	6%
1993-2000	13%
2001-2009	11%
2010 or later	2%
Don't know/refused	13%

Q73. How long have you lived in your current home?

Less than a year	9%
1-2 years	13%
3-5 years	16%
6-10 years	17%
More than 10 years	42%
Don't know/refused	2%

Q74. What is your home's primary source of energy for space heating?

Electricity	43%
Natural gas	41%
Liquid propane gas (LPG)	1%
Fuel oil (kerosene)	2%
Solar	1%
Wood	8%
Other	2%
Don't know/refused	3%

Q75. What is your home's primary source of energy for water heating?

Electricity	56%
Natural gas	36%
Liquid propane gas (LPG)	1%
Fuel oil (kerosene)	0%
Solar	1%
Wood	0%
Other	1%
Don't know/refused	5%

Q76. Which of the following best describes the square footage of the living area (heated area) of your home?

Fewer than 500 square feet	4%
500 to less than 1,000 square feet	16%
1,000 to less than 1,500 square feet	23%
1,500 to less than 2,000 square feet	27%
2,000 to less than 2,500 square feet	11%
2,500 to less than 3,000 square feet	5%
More than 3,000 square feet	5%
Don't know	10%

Q77. Do you have children age 18 or under living with you at home?

Yes	33%
No	64%
Don't know/None specified	3%

Q78. What is the last grade or level of school you have completed?

Less than high school degree	2%
High school graduate	18%
Some college - but less than two years of college	17%
Some college - two years or more/AA degree	17%
Technical or trade school	3%
College graduate/Bachelors degree/BA/BS	23%
Postgraduate courses	3%
Masters degree	9%
MBA or Law degree	1%
PhD or MD	2%
Don't know/None specified	5%

Q79. Do you live in a large city, a suburb just outside a large city, a small city, a suburb just outside a small city or a less developed or rural area that is not near a city?

A large city	18%
A suburb of a large city	21%
A small city	34%
A suburb of a small city	7%
More rural, less developed	16%
Don't know	4%

Q80. Do you generally consider yourself:

Liberal	27%
Moderate	28%
Conservative	32%
Don't know/none specified	13%

Q81. For statistical purposes only, we would like to know your total family income for 2012.

Less than \$10,000	4%
\$10,000 to less than \$30,000	15%
\$30,000 to less than \$40,000	9%
\$40,000 to less than \$50,000	9%
\$50,000 to less than \$60,000	9%
\$60,000 to less than \$70,000	5%
\$70,000 to less than \$90,000	9%
\$90,000 to less than \$110,000	4%
\$110,000 to less than \$150,000	4%
\$150,000 to less than \$200,000	2%
\$200,000 or more	1%
Don't know/refused	28%

Q82. Which of the following ethnic groups describes you?

White or Caucasian	83%
Black or African American	1%
Latino, Hispanic, or Mexican	6%
Asian or Pacific Islander	1%
Native American	1%
Mixed Race	1%
Other	1%
Don't know/refused	6%

*Asked of those who said something other than Latino, Hispanic, or Mexican in Q82*

Q83. Do you consider yourself to be of Hispanic descent?

Yes	1%
No	93%
Don't know	5%



*Asked of those who said they were Latino, Hispanic, or Mexican in Q82 or Q83*

Q84. In your home, do you speak Spanish:

All of the time	22%
Some of the time	28%
Never	50%
Don't know	0%

Q85. Which of the following best describes the telecommunications in your household?

My household is a cell phone only household with no landline	32%
My household has a landline but all or most calls are made by cell phone	28%
My household has a cell phone and landline but all, almost all or some calls are made on the landline	28%
My household has a landline only - no cell phones at all	7%
Don't know/Refused	5%

*Gender.*

Male	47%
Female	53%



**Benenson Strategy Group  
Energy Trust of Oregon  
2013 Residential Awareness and Perceptions Study  
June 2013**

**Interviews: 800 interviews with adults in Energy Trust of Oregon’s service area, who have at least some responsibility for making decisions about utilities in their house and paying the electric bill, and are customers of PGE, Pacific Power, NW Natural, or Cascade Natural Gas**

**Oversample: An oversample of 50 interviews with Cascade Natural Gas customers who meet the previous criteria.**

**Survey Length: 20 minutes**

**SPLITS:**

**SPLIT A/B=1/2 Sample**

**SPLIT C/D/E=1/3 Sample**

**SPLIT F/G=1/2 Sample**

**Screeners**

**ASK OF ALL**

1. Are you 18 years of age or older and a current resident of Oregon?

- 1) Yes
- 2) No **TERMINATE**
- 9) Don’t know/refused **TERMINATE**

2. What county do you live in? **OPEN END WITH PRE-CODES**

- |                |                  |                |                  |
|----------------|------------------|----------------|------------------|
| 1) Baker       |                  | 20) Lane       |                  |
| 2) Benton      |                  | 21) Lincoln    |                  |
| 3) Clackamas   |                  | 22) Linn       |                  |
| 4) Clatsop     |                  | 23) Malheur    |                  |
| 5) Columbia    |                  | 24) Marion     |                  |
| 6) Coos        |                  | 25) Morrow     |                  |
| 7) Crook       |                  | 26) Multnomah  |                  |
| 8) Curry       | <b>TERMINATE</b> | 27) Polk       |                  |
| 9) Deschutes   |                  | 28) Sherman    |                  |
| 10) Douglas    |                  | 29) Tillamook  | <b>TERMINATE</b> |
| 11) Gilliam    |                  | 30) Umatilla   |                  |
| 12) Grant      | <b>TERMINATE</b> | 31) Union      | <b>TERMINATE</b> |
| 13) Harney     | <b>TERMINATE</b> | 32) Wallowa    |                  |
| 14) Hood River |                  | 33) Wasco      |                  |
| 15) Jackson    |                  | 34) Washington |                  |
| 16) Jefferson  |                  | 35) Wheeler    | <b>TERMINATE</b> |
| 17) Josephine  |                  | 36) Yamhill    |                  |
| 18) Klamath    |                  | 37) Other      | <b>TERMINATE</b> |
| 19) Lake       |                  | 99) Don’t know | <b>TERMINATE</b> |

3. How much responsibility do you have for paying your household's energy bills or buying new appliances? **READ LIST**

- 1) All of the responsibility
- 2) Some of the responsibility
- 3) None of the responsibility (ASK TO TALK TO DECISION MAKER) **TERMINATE**
- 4) Don't receive energy bills **DO NOT READ** **TERMINATE**
- 9) Don't know **DO NOT READ** **TERMINATE**

4. Are you, or is anyone in your household, employed by an electric or gas utility company?

- 1) Yes **TERMINATE**
- 2) No
- 9) Don't know **DO NOT READ** **TERMINATE**

5. Do you rent or own your home?

- 1) Own
- 2) Rent
- 3) Neither **TERMINATE DO NOT READ**
- 9) Don't know **TERMINATE DO NOT READ**

6. What is the name of your electric utility?

- 1) P.G.E., or Portland General Electric
- 2) Pacific Power
- 3) EWEB, or Eugene Water & Electric Board
- 4) Other **SPECIFY** **DO NOT READ**
- 99) Don't know **DO NOT READ**

7. What is the name of your gas utility?

- 1) Northwest Natural
- 2) Cascade Natural Gas
- 3) Avista
- 4) Don't use natural gas **DO NOT READ**
- 5) Other **SPECIFY** **DO NOT READ**
- 99) Don't know **DO NOT READ**

## Key Metrics and Awareness

8. As far as you know, do any organizations in your area offer incentives to help you save energy or use renewable energy at home? **IF YES:** Which ones?

**OPEN END WITH PRECODES ACCEPT MULTIPLE RESPONSES**

- 1) No **EXCLUSIVE CHOICE**
- 2) Energy Trust of Oregon
- 3) P.G.E., or Portland General Electric
- 4) Pacific Power
- 5) EWEB, or Eugene Water & Electric Board
- 6) Northwest Natural
- 7) Cascade Natural Gas
- 8) Avista
- 9) Energy Star
- 10) Clean Energy Works Oregon, or C.E.W.O.
- 11) Federal government
- 12) Oregon state government, or Oregon Department of Energy
- 13) Local government/my town
- 14) Other **SPECIFY DO NOT READ**
- 99) Don't know **DO NOT READ**

### READ TO ALL

Now, I am going to read you the names of some organizations, companies, and programs involved in energy and energy efficiency. For each one, please tell me whether you know a great deal about them, some but not a lot, not very much, or nothing at all.

### RANDOMIZE, USE SAME CODES

9. Energy Trust of Oregon.

Would you say you know: **READ LIST**

- 1) A great deal about them
- 2) Some but not a lot
- 3) Not very much
- 4) Nothing at all
- 9) Don't know **DO NOT READ**

10. Energy Star.

### ASK IF CODED AS PGE:

11. P.G.E., or Portland General Electric.

### ASK IF CODED AS PACIFIC POWER

12. Pacific Power.



**ASK IF CODED AS NWN**

13. Northwest Natural.

**ASK IF CODED AS CNG**

14. Cascade Natural Gas.

**END SERIES**

**READ TO THOSE AWARE OF ENERGY TRUST OR ENERGY STAR (Q9=1,2,3 OR Q10=1,2,3)**

Now you will hear some of the same names, and this time, please tell me if you have a favorable or unfavorable view of them.

**ROTATE NEXT TWO, USE SAME CODES**

**ASK IF AWARE OF ENERGY TRUST: Q9=1,2,3**

15. Energy Trust of Oregon. Do you have a very favorable view of it, somewhat favorable, somewhat unfavorable, or very unfavorable view of it?

- 1) Very favorable
- 2) Somewhat favorable
- 3) Somewhat unfavorable
- 4) Very unfavorable
- 5) Heard of but no opinion
- 6) Have not heard of
- 9) Don't know

**DO NOT READ**  
**DO NOT READ**  
**DO NOT READ**

**ASK IF AWARE OF ENERGY STAR: Q10=1,2,3**

16. Energy Star. Do you have a very favorable view of it, somewhat favorable, somewhat unfavorable, or very unfavorable view of it?

**END SERIES**

**ASK OF ALL**

17. Would you say that currently, your home is: **READ LIST**

**ALTERNATE 1-4/4-1**

- 1) Very energy efficient
- 2) Somewhat energy efficient
- 3) Not very energy efficient
- 4) Not energy efficient at all
- 9) Don't know **DO NOT READ**

18. Some people take steps to reduce the amount of energy they use in their homes, and others do not. How about you? Have you taken any steps in the past 12 months to reduce the amount of energy you use in your home?

- 1) Yes
- 2) No
- 9) Don't know **DO NOT READ**



19. How likely are you to take steps to reduce your household's energy consumption in the next 12 months? Are you: **ALTERNATE 1-4/4-1**

- 1) Very likely
- 2) Somewhat likely
- 3) Not very likely
- 4) Not at all likely
- 9) Don't know **DO NOT READ**

20. Thinking about the total amount of energy consumed in your home, would you say you are: **ALTERNATE 1-4/4-1**

- 1) Very concerned
- 2) Somewhat concerned
- 3) Not very concerned
- 4) Not concerned at all
- 9) Don't know **DO NOT READ**

**SPLIT C:**

21. Would reducing the amount of energy you use in your home be: **ALTERNATE 1-4/4-1**

- 1) Very easy
- 2) Somewhat easy
- 3) Somewhat difficult
- 4) Very difficult
- 9) Don't know **DO NOT READ**

**SPLIT D:**

22. Would making your home more energy efficient be: **ALTERNATE 1-4/4-1**

- 1) Too expensive
- 2) Expensive, but worth it
- 3) Affordable
- 4) Inexpensive
- 9) Don't know **DO NOT READ**

**SPLIT E:**

23. Would using renewable energy in your home be: **ALTERNATE 1-4/4-1**

- 1) Too expensive
- 2) Expensive, but worth it
- 3) Affordable
- 4) Inexpensive
- 9) Don't know **DO NOT READ**



**ASK OF ALL**

24. When it comes to the energy you use in your home, which of the following is most important to you? **READ AND RANDOMIZE**

- 1) Not wasting energy
- 2) Saving money
- 3) Protecting the environment
- 4) The comfort of your home
- 9) Don't know **DO NOT READ**

**Dynamics of the Energy Efficiency Landscape**

**READ TO ALL**

Next, I'm going to read you some statements people might make about the energy they use in their homes. Please tell me how well each statement describes you personally.

**RANDOMIZE Q25-32; USE SAME CODES, REPEAT SCALE AS NECESSARY**

Does this describe you: **READ LIST**

- 1) A great deal
- 2) Some but not a lot
- 3) Not very much
- 4) Not at all
- 9) Don't know **DO NOT READ**

**Motivations**

- 25. **SPLIT C:** I hate wasting anything, including the energy in my home
- 26. **SPLIT D:** When it comes to my energy use, the most important thing is reducing my bill
- 27. **SPLIT E:** It's important to me that we reduce dependence on fossil fuels

**Barriers**

- 28. **ALL:** I want to make my home more energy efficient but I just can't afford it
- 29. **ALL:** When it comes to reducing my energy consumption, I know exactly what steps I should be taking
- 30. **SPLIT C:** Reducing the amount of energy I use in my home will make my home less comfortable for me and my family
- 31. **SPLIT D:** I think energy efficient products are just another way for people to make money by charging more.
- 32. **SPLIT E:** I think new energy efficient products like L.E.D. lights aren't any better than C.F.L.'s and aren't worth the upfront cost.

**END ROTATE**

## Energy Trust: Brand Image

### READ TO ALL

Now, I'd like to ask you a few questions about Energy Trust of Oregon.

### SPLIT A:

33. To the best of your knowledge, what does Energy Trust offer? **OPEN END**

### SPLIT B:

34. Now I am going to read you a list of incentives or services that an organization could offer to help residents use less energy in their homes. For each one I read, please tell me whether you believe that Energy Trust provides that incentive or service to Oregon residents.

**READ, RANDOMIZE, ACCEPT MULTIPLE RESPONSES, MARK ALL POSITIVE RESPONSES.**

**IF NEEDED, ASK:** Do you believe Energy Trust offers this service?

- 1) Provides home energy audits (also known as "home energy reviews" or "home energy profiles")
- 2) Offers cash incentives to residents who purchase more energy efficient refrigerators, freezers, and clothes washers
- 3) Offers cash incentives to residents who install more energy efficient heating systems or water heaters
- 4) Offers cash incentives to residents who install insulation or seal air leaks
- 5) Offers cash incentives to residents who install solar electric systems or solar hot water systems
- 6) Offers cash incentives to have old refrigerators or freezers recycled
- 7) Provides energy saver kits that contain light bulbs, a shower head and other water saving devices
- 8) None of the above **DO NOT READ, SELECT IF NONE MARKED**
- 9) Don't know **DO NOT READ**

### READ TO THOSE AWARE OF ENERGY TRUST: Q9=1,2,3

Now I'm going to read you a list of statements people might make about an organization. For each one, please tell me how well you think it describes Energy Trust of Oregon.

### RANDOMIZE SERIES; USE SAME CODES, REPEAT SCALE AS NECESSARY

How well does this describe Energy Trust? Please use a scale of 1 to 5, where 5 means it describes Energy Trust extremely well, and 1 means that it does not describe Energy Trust at all. Feel free to use any number between 1 and 5.

- 1) 1 DOES NOT DESCRIBE AT ALL
- 2) 2
- 3) 3
- 4) 4
- 5) 5 DESCRIBES EXTREMELY WELL
- 9) Don't know **DO NOT READ**

**Brand Image**

- 35. **SPLIT F:** Is an organization you trust
- 36. **SPLIT G:** Serves the residents of Oregon well in their efforts to increase energy efficiency and reduce energy consumption
- 37. **SPLIT F:** Makes energy efficiency more affordable for you
- 38. **SPLIT G:** Saves you money and energy

**View of Info/Services**

- 39. **SPLIT F:** Provides services and offers that are relevant to you
- 40. **SPLIT G:** Is the best source for information on energy efficiency and renewable energy
- 41. **SPLIT F:** Is a credible information source for Oregon residents to learn about energy efficiency and renewable energy

**How Energy Trust Helps You**

- 42. **SPLIT G:** Understands the obstacles people face in trying to make their home more energy efficient
- 43. **SPLIT F:** Makes it easier for you to make your home more energy efficient
- 44. **SPLIT G:** Makes it more affordable for you to make your home more energy efficient

**END ROTATE**

**Energy Efficiency Behaviors**

**ASK IF Q18=1**

45. You mentioned that you have taken steps to reduce the amount of energy you use in your home. Which of the following actions have you taken in the past 12 months to reduce the amount of energy you use in your home? **READ LIST AND RANDOMIZE, ACCEPT MULTIPLE RESPONSES, RECORD ALL POSITIVE RESPONSES**

- 1) Conducted a home energy audit yourself
- 2) Had a professional conduct a home energy audit
- 3) Installed a furnace, fireplace, heat pump, or water heater
- 4) Added insulation or sealed leaks or ducts
- 5) Replaced windows or installed energy efficient windows
- 6) Replaced a clothes washer, refrigerator, or freezer
- 7) Recycled an old or extra refrigerator
- 8) Added a solar electric system or solar water heating system
- 9) Bought or installed compact fluorescent light, or C.F.L., bulbs
- 10) Bought or installed L.E.D. bulbs
- 11) Bought an energy efficient or Energy Star appliance
- 12) Routinely unplugged chargers or electronics
- 13) Installed a programmable thermostat
- 14) Routinely turned down the thermostat
- 15) None **EXCLUSIVE CHOICE DO NOT READ**
- 16) Other **SPECIFY DO NOT READ**
- 99) Don't know **EXCLUSIVE CHOICE DO NOT READ**



**ASK IF Q19=1,2**

46. You mentioned that you plan to take steps in the next 12 months to reduce the amount of energy you use in your home. Now I am going to read a list of actions that people could take to reduce the amount of energy that they use in their homes. For each one, please tell me whether you plan to take that action in the next 12 months. You may tell me all that apply.

**READ LIST AND RANDOMIZE; ACCEPT MULTIPLE RESPONSES, RECORD ALL POSITIVE RESPONSES**

- 1) Conduct a home energy audit yourself
- 2) Have a professional conduct a home energy audit
- 3) Install a furnace, fireplace, heat pump, or water heater
- 4) Add insulation or seal leaks or ducts
- 5) Replace windows or install energy efficient windows
- 6) Replace a clothes washer, refrigerator, or freezer
- 7) Recycle an old or extra refrigerator
- 8) Add a solar electric system or solar water heating system
- 9) Buy or install compact fluorescent light, or C.F.L., bulbs
- 10) Buy or install L.E.D. bulbs
- 11) Buy an energy efficient or Energy Star appliance
- 12) Routinely unplug chargers or electronics
- 13) Install a programmable thermostat
- 14) Routinely turn down the thermostat
- 15) None **EXCLUSIVE CHOICE DO NOT READ**
- 16) Other **SPECIFY DO NOT READ**
- 99) Don't know **EXCLUSIVE CHOICE DO NOT READ**

**ASK OF ALL**

47. Do you have any types of compact fluorescent light bulbs, sometimes called "twisty bulbs", in your home? **IF YES:** Approximately how many of these bulbs do you have installed in your home? **READ CHOICES 2-5**

- 1) No/Don't have any **DO NOT READ EXCLUSIVE CHOICE**
- 2) 1-5
- 3) 6-10
- 4) 11-20
- 5) More than 20
- 9) Don't know **DO NOT READ**

48. Are you using any L.E.D light bulbs in your home? Please think about regular size light bulbs, not night lights, Christmas lights or other decorative bulbs. **IF YES:** Approximately how many of these bulbs do you have installed in your home?

- 1) No/Don't have any **DO NOT READ EXCLUSIVE CHOICE**
- 2) 1-5
- 3) 6-10
- 4) 11-20
- 5) More than 20
- 9) Don't know **DO NOT READ**

## Engagement with Energy Trust

### ASK OF ALL

49. Have you ever received any services, rebates, or incentives from Energy Trust?

- 1) Yes
- 2) No
- 9) Don't know

**DO NOT READ**

### ASK IF Q49=1:

50. Which of the following types of services or incentives have you received from Energy Trust? Please tell me all that apply. **READ AND RANDOMIZE, ALLOW MULTIPLE RESPONSES, ACCEPT ALL POSITIVE RESPONSES**

- 1) A home energy audit or home energy review
- 2) A check from Energy Trust after purchasing an efficient appliance such as a clothes washer, refrigerator, or freezer
- 3) A check from Energy Trust after installing an efficient heating system or water heater
- 4) A check from Energy Trust after installing insulation or sealing air leaks
- 5) A check from Energy Trust after installing a solar electric system or solar hot water system
- 6) A check from Energy Trust after recycling an old refrigerator or freezer
- 7) An energy saver kit from Energy Trust that contains light bulbs, a shower head, and other water saving devices
- 8) Other **SPECIFY** **DO NOT READ**
- 99) Don't know **DO NOT READ**

### ASK IF Q50=1-8:

51. How satisfied were you with your experience with Energy Trust? Please use a scale of 1 to 5, where 5 means you were very satisfied with your experience with Energy Trust, and 1 means you were not at all satisfied with your experience. You may use any number from 1 to 5.

- 1) 1 – Not at all satisfied
- 2) 2
- 3) 3
- 4) 4
- 5) 5 – Very satisfied
- 9) Don't know **DO NOT READ**

### ASK IF Q51=4,5

52. What was the main reason you were satisfied with the service or incentive you received from Energy Trust? Please be as specific as possible. **OPEN END**

**ASK IF Q51=1,2**

53. What was the main reason you were not satisfied with the service or incentive you received from Energy Trust? Please be as specific as possible. **OPEN END**

**READ TO ALL**

Now I am going to read you a little more about Energy Trust of Oregon, and get your opinion.

Energy Trust of Oregon provides cash incentives, information, and services to help customers of Portland General Electric, Pacific Power, Northwest Natural, and Cascade Natural Gas save energy and manage costs in homes and businesses, as well as take advantage of renewable energy options. Some examples include energy audits, cash incentives for home weatherization and purchasing energy efficient appliances, and free energy saver kits that include light bulbs and other energy saving devices.

54. In the next 12 months, how likely are you to participate in Energy Trust services or incentives like the ones I just mentioned? Are you: **ALTERNATE 1-4/4-1**

- 1) Very likely
- 2) Somewhat likely
- 3) Not very likely
- 4) Not at all likely
- 9) Don't know

**DO NOT READ**

Now I am going to read you a little bit more about Energy Trust. For each statement I read, please tell me how convincing a reason it is for you to participate in Energy Trust services or incentives in the next 12 months.

**RANDOMIZE Q55-Q62, USE SAME CODES, REPEAT SCALE AS NECESSARY**

Is this a very convincing reason for you to participate in Energy Trust services or incentives in the next 12 months, somewhat convincing, not very convincing, or not convincing at all?

- 1) Very convincing
- 2) Somewhat convincing
- 3) Not very convincing
- 4) Not convincing at all
- 9) Don't know

**DO NOT READ**

55. **SPLIT A:** Energy Trust's information, services, and cash incentives have saved participating customers more than 1.3 billion dollars on their energy bills over the past decade.

56. **SPLIT B:** Energy Trust offers low and no-cost ways to reduce the amount of energy you use in your home, helping both homeowners and renters use less energy.

57. **SPLIT A:** Energy Trust's cash incentives help residential customers lower their energy costs, increase comfort, and improve the value of their home.

58. **SPLIT B:** Energy Trust's services and incentives help reduce carbon emissions in the region, creating a more sustainable energy future for Oregon.



59. **SPLIT A:** By participating in an Energy Trust service, you are not only saving money, but also helping to reduce energy waste and keep energy costs lower for everyone.

60. **SPLIT B:** Energy Trust works for the greater good of all Oregonians (Or ih go ni ans) by reducing energy waste and helping keep energy costs as low as possible.

61. **SPLIT A:** Energy Trust’s investments help create jobs and wages, and build Oregon’s clean energy economy.

62. **SPLIT B:** Energy Trust only supports proven energy saving solutions and has a network of qualified contractors you can trust.

**END SERIES**

**ASK OF ALL**

63. Now I am going to read you some ways people could hear about Energy Trust. For each one I read, please tell me whether you have seen or heard about Energy Trust in that way in the past 12 months. **READ LIST AND RANDOMIZE, ALLOW MULTIPLE RESPONSES, ACCEPT ALL POSITIVE RESPONSES**

- 1) Through word of mouth
- 2) On social media like Facebook or Twitter
- 3) Email newsletters from your utility company
- 4) Inserts in your electric or gas utility bill
- 5) Advertisements you saw or heard online
- 6) Advertisements you saw on T.V.
- 7) Advertisements you heard on the radio
- 8) Advertisements you saw in a magazine or newspaper
- 9) On a contractor’s website
- 10) On your utility company’s website
- 11) Have not heard about them in past 12 months **DO NOT READ** **EXCLUSIVE**
- 12) Other **SPECIFY** **DO NOT READ**
- 99) Don’t know **DO NOT READ**

**ASK IF Q63 = 5,6,7,8**

64. What was the main message of the advertisements you saw for Energy Trust?

**OPEN END**

**ASK IF Q63=5**

65. Where did you see or hear an online ad or referral for Energy Trust? Please tell me all the places that you have seen or heard an ad or referral for Energy Trust online. **PROBE:** Anywhere else? **OPEN END WITH PRECODES, DO NOT READ LIST, ACCEPT MULTIPLE RESPONSES**

- 1) On an online radio station, like Pandora
- 2) On the side, top, or bottom of a webpage
- 3) On Facebook
- 4) On Twitter
- 5) On another social media site
- 6) On a contractor’s website
- 7) On a utility’s website
- 8) On a mobile app **SPECIFY**
- 9) On another website **SPECIFY**
- 10) Other **SPECIFY**
- 99) Don’t know **DO NOT READ**

**ASK IF Q63=5**

66. And when you saw or heard that online ad for Energy Trust, did it make you:  
**ALTERNATE 1-4/4-1**

- 1) Much more interested in learning more about Energy Trust
- 2) Somewhat more interested
- 3) Somewhat less interested
- 4) Much less interested in learning more about Energy Trust
- 9) Don’t know **DO NOT READ**

**ASK OF ALL**

67. There are many ways Energy Trust could communicate with Oregon residents like you. For you personally, how would you MOST prefer to receive information from Energy Trust?  
**READ LIST AND RANDOMIZE, SINGLE CHOICE**

- 1) Receive an email from Energy Trust
- 2) Receive postal mail from Energy Trust
- 3) Receive an insert in your electric or gas bill
- 4) Follow them on Facebook, Twitter or other social media
- 5) Visit Energy Trust’s website
- 6) Don’t want to receive information **DO NOT READ**
- 7) Other **SPECIFY** **DO NOT READ**
- 99) Don’t know **DO NOT READ**

**ASK IF PREVIOUS=1,2,3,4,5,7**

68. And after that, how would you next prefer to receive information from Energy Trust?  
**USE SAME CODES; READ LIST IF NECESSARY AND RANDOMIZE IN SAME ORDER; REMOVE PREVIOUS CHOICE; SINGLE CHOICE**

**ASK OF ALL**

69. Now I am going to read you a list of some local organizations that Energy Trust could partner with to offer information or services to residents like you. Which of the following would you be interested in hearing from about information or services that Energy Trust offers? Please tell me all that apply. **READ LIST, RANDOMIZE, ACCEPT ALL POSITIVE RESPONSES**

- 1) Local community colleges or universities
- 2) Businesses in your area
- 3) Your place of worship
- 4) Your local library
- 5) Schools in your area
- 6) Your local government
- 7) Chamber of commerce
- 8) Your local water utility
- 9) Other **SPECIFY** **DO NOT READ**
- 10) None of the above **DO NOT READ**
- 99) Don't know **DO NOT READ**

**Demographics**

**READ TO ALL**

Thank you for your time and participation so far. We're nearly done. I have just a few final questions for statistical purposes only.

70. What year were you born? **OPEN END**

71. What type of home do you live in? **READ LIST**

- 1) Single-family detached house
- 2) Single-family attached house (such as a townhouse)
- 3) Duplex, triplex, or fourplex
- 4) Apartment or condominium with 5 units or more
- 5) Manufactured or mobile home
- 6) Other **SPECIFY** **DO NOT READ**
- 99) Don't know/refused **DO NOT READ**

72. What year was your home built? **READ LIST IF NECESSARY**

- 1) Before 1970
- 2) 1970-1979
- 3) 1980-1986
- 4) 1987-1992
- 5) 1993-2000
- 6) 2001-2009
- 7) 2010 or later
- 9) Don't know/refused **DO NOT READ**

73. How long have you lived in your current home? **READ LIST IN ORDER**
- 1) Less than a year
  - 2) 1-2 years
  - 3) 3-5 years
  - 4) 6-10 years
  - 5) More than 10 years
  - 9) Don't know/refused **DO NOT READ**
74. What is your home's primary source of energy for space heating? **RANDOMIZE**
- 1) Electricity
  - 2) Natural gas
  - 3) Liquid propane gas (LPG)
  - 4) Fuel oil (kerosene)
  - 5) Solar
  - 6) Wood
  - 7) Other **SPECIFY DO NOT READ**
  - 99) Don't know/refused **DO NOT READ**
75. What is your home's primary source of energy for water heating? **RANDOMIZE**
- 1) Electricity
  - 2) Natural gas
  - 3) Liquid propane gas (LPG)
  - 4) Fuel oil (kerosene)
  - 5) Solar
  - 6) Wood
  - 7) Other **SPECIFY DO NOT READ**
  - 99) Don't know **DO NOT READ**
76. Which of the following best describes the square footage of the living area (heated area) of your home? **READ LIST IF NECESSARY**
- 1) Fewer than 500 square feet
  - 2) 500 to less than 1,000 square feet
  - 3) 1,000 to less than 1,500 square feet
  - 4) 1,500 to less than 2,000 square feet
  - 5) 2,000 to less than 2,500 square feet
  - 6) 2,500 to less than 3,000 square feet
  - 7) More than 3,000 square feet
  - 9) Don't know **DO NOT READ**

77. Do you have children age 18 or under living with you at home? **(If respondent asks about part-time children, please include part-time as “yes”)**

- 1) Yes
- 2) No
- 9) Don't know/None specified **DO NOT READ**

78. What is the last grade or level of school you have completed? **READ LIST IF NECESSARY**

- 1) Less than high school degree
- 2) High school graduate
- 3) Some college – but less than two years of college
- 4) Some college – two years or more/AA degree
- 5) Technical or trade school
- 6) College graduate/Bachelors degree/BA/BS
- 7) Postgraduate courses
- 8) Masters degree
- 9) MBA or Law degree
- 10) PhD or MD
- 99) Don't know/None specified **DO NOT READ**

79. Do you live in a large city, a suburb just outside a large city, a small city, a suburb just outside a small city or a less developed or rural area that is not near a city?

- 1) A large city
- 2) A suburb of a large city
- 3) A small city
- 4) A suburb of a small city
- 5) More rural, less developed
- 9) Don't know **DO NOT READ**

80. Do you generally consider yourself: **READ LIST AND ALTERNATE 1-3/3-1**

- 1) Liberal
- 2) Moderate
- 3) Conservative
- 9) Don't know/none specified **DO NOT READ**



81. For statistical purposes only, we would like to know your total family income for 2012. Will you please tell me which of the following categories best represents your total family income? **READ LIST IN ORDER**

- 1) Less than \$10,000
- 2) \$10,000 to less than \$30,000
- 3) \$30,000 to less than \$40,000
- 4) \$40,000 to less than \$50,000
- 5) \$50,000 to less than \$60,000
- 6) \$60,000 to less than \$70,000
- 7) \$70,000 to less than \$90,000
- 8) \$90,000 to less than \$110,000
- 9) \$110,000 to less than \$150,000
- 10) \$150,000 to less than \$200,000 or more
- 11) \$200,000 or more
- 99) Don't know/refused

**DO NOT READ**

82. Which of the following ethnic groups describes you? You can stop me when I've read your group. **READ LIST IN ORDER, SINGLE CHOICE ONLY**

- 1) White or Caucasian
- 2) Black or African American
- 3) Latino, Hispanic, or Mexican
- 4) Asian or Pacific Islander
- 5) Native American
- 6) Mixed Race
- 7) Other
- 99) Don't know/refused

**SPECIFY**

**DO NOT READ**

**DO NOT READ**

**ASK IF Q82=NOT 3**

83. Do you consider yourself to be of Hispanic descent?

- 1) Yes
- 2) No
- 9) Don't know

**DO NOT READ**

**IF HISPANIC (Q82=3 OR Q83=1)**

84. In your home, do you speak Spanish: **READ LIST IN ORDER**

- 1) All of the time
- 2) Some of the time
- 3) Never
- 9) Don't know

**DO NOT READ**



**ASK OF ALL**

85. Which of the following best describes the telecommunications in your household?

**READ AND ALTERNATE 1-4/4-1**

- 1) My household is a cell phone only household with no landline
- 2) My household has a landline but all or most calls are made by cell phone
- 3) My household has a cell phone and landline but all, almost all or some calls are made on the landline
- 4) My household has a landline only - no cell phones at all
- 9) Don't know/Refused

**DO NOT READ**

86. Finally, for statistical purposes only, can I please have the exact address of your residence? This information is for research purposes only and will not be used to contact you in the future. **OPEN END**