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Final Report

2010 Oregon Residential Awareness and Perceptions Study

Funded By:

EnergyTrust of Oregon

Submitted To:

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ES EXECUTIVE SUMMARY

This report provides the results of the *2010 Oregon Residential Awareness and Perception Study*. This is the third consecutive year Research Into Action, Inc. and our subcontractor, Abt SRBI, Inc., have conducted an *Oregon Residential Awareness and Perception Study* for Energy Trust of Oregon (Energy Trust). The goal of this report is to provide findings and recommendations Energy Trust may use in its marketing and residential energy-saving programs.

From May through July 2010, Abt SRBI, Inc. completed 956 interviews with Oregon households in Energy Trust's service area – a change from previous years when residents were surveyed statewide. This year's survey included purchased cell phone numbers to counteract a sampling challenge due to the increasing number of cell-phone-only households.

The data suggest that almost half (48%) of the Oregon households within the Energy Trust service territory recognize the name of "Energy Trust." This awareness has grown steadily since our first study in 2008; it is now 16% higher than just two years ago. We estimate the rate of participation in Energy Trust programs at 17%. This is a large increase since 2009, which we attribute partly to the improved measurement method. We continue to note significant discrepancies between the levels of urban and rural Oregonians' awareness of Energy Trust and participation in its programs.

As in the past studies, we observe demographic and attitudinal differences between reported participants in Energy Trust programs and nonparticipants. Participants overwhelmingly were homeowners who lived in single-family homes that are older in age and larger in structure. Compared to nonparticipants, participants were more likely to heat their homes with natural gas, have a higher household income, and be more educated. They exhibited greater concern of human impact on the environment and stronger sense of responsibility to limit their energy use.

We also studied specific home features and energy-using behaviors. The Oregon households we surveyed have an average of 2.2 television sets. Fifty-four percent of the surveyed households reported they had an air-conditioning system, of which 27% were room air-conditioners. We estimate a CFL penetration rate of 86%, which is virtually unchanged since 2009, but the number of CFLs installed has increased slightly. On average, about 56% of a respondent's laundry loads were washed in cold water only, and only 15% of clothes were dried on a line or rack. The ENERGY STAR® label was recognized by 72% of the Oregon households surveyed (64% nationwide).

We offer the following conclusions and recommendations:

- **Conclusion 1: The new sampling strategy largely remedied the sampling problem due to increasing cell-phone-only households.** Demographic distributions of

completed samples were generally within reasonable ranges around the census even without post-weighting. The sampling strategy that combined landline RDD and a purchased list of random cell phone numbers, together with inclusion of key demographic quotas and post-weighting the results to reflect differential selection probabilities, resulted in a balanced sample overall.

Recommendation: Continue to use this sampling and data collection method for large-scale surveys for general households. The development of cell phone usage should be monitored, and sampling for future surveys needs to address the change accordingly.

➡ **Conclusion 2: Energy Trust's marketing effort seems to be working well, since almost half of the households we contacted in the Energy Trust service area recognized the Energy Trust of Oregon name.** Since 2009, the overall awareness level has increased by 7%. Although we observed more notable increases particularly in rural areas, the urban-rural gap in Energy Trust awareness still is prominent. Moreover, many of those aware still lack substantive knowledge of Energy Trust programs.

➡ **Conclusion 3: Overall, reported participation in Energy Trust programs is about 17%.** As we found in our analysis of general awareness of Energy Trust, urban households continue to participate in Energy Trust programs more frequently than do households in rural Oregon. The improved questionnaire seems to more accurately measure the self-reported participation rate.

Recommendation: Self-reported participation should be compared with actual participation to confirm the validity of the new method to measure self-reported participation. While we believe that the new measurement better captures the participation rate, it is essential to assure the validity of the approach.

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EnergyTrust of Oregon

MEMO

Date: October 5, 2010
To: Board of Directors
From: Sarah Castor, Evaluation Project Manager
Subject: Staff Response to the 2010 Residential Awareness and Perceptions Study

The 2010 Oregon Residential Awareness and Perceptions Study is our third annual awareness survey. The goals of the study, as in previous years, were: 1) to gather information about the level of awareness Oregonians have of Energy Trust; 2) to test the effectiveness of marketing strategies and as an indicator of where investment is needed; 3) to compare awareness and participation with similar figures from last year's study and 4) to better understand behaviors and perceptions surrounding the topics of energy and climate change.

Unlike previous years' surveys, this year only residential customers of utilities served by Energy Trust were contacted rather than residents statewide to exclude households that were not eligible for our services. The sample also included more customers of Cascade Natural Gas, since this relatively small customer group was poorly represented in previous years.

Awareness among customers of our funding utilities increased again, to 48% in 2010. We were also pleased to see that better crafted questions on participation reflected more accurate rates of self-reported participation – on average 17% territory-wide. Our own analysis of program participation relative to residential utility accounts indicates actual participation upwards of 20%.

The effort we have put into the last year's outreach activities, marketing and earned media in outlying areas is paying off, with significant increases in awareness and participation in Southern and Eastern Oregon. In addition, a third of those aware of Energy Trust learned about us through mass media channels, a significant increase from past years.

As with last year, we are glad to see that the vast majority of our participants were satisfied with their experience and that many plan to participate in our residential programs again (as do many nonparticipants). We are also heartened to see that CFLs continue to hold their ground in Oregon household lighting despite a national decrease in shipments and sales due to the economic recession.

We plan to continue the survey on an annual basis, to track awareness and participation, as well as provide an opportunity to explore different energy use behaviors and test new marketing messages.