2012 Oregon Residential Awareness & Perceptions Study

Conservation Advisory Council

November 28, 2012

EnergyTrust of Oregon

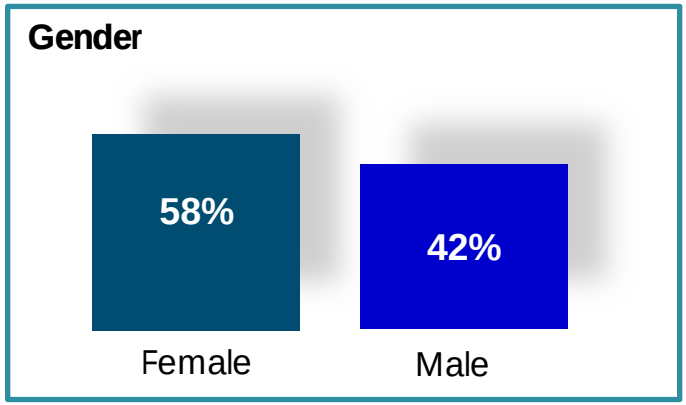
Survey Background & Objectives

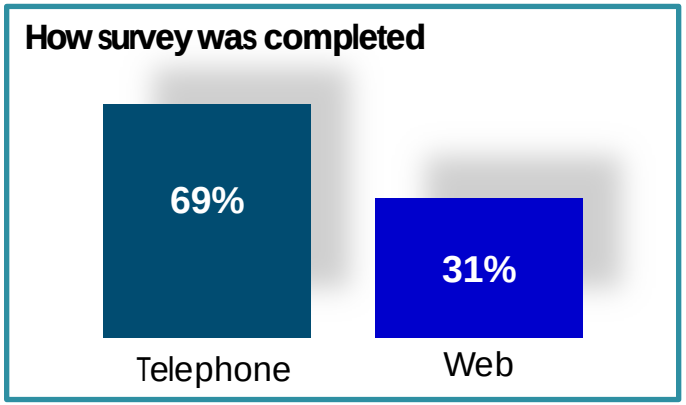
- Contractor: OnTarget Consulting & Research
- 5th Annual Survey
- Purpose: Gain insight into utility customer awareness and perceptions of Energy Trust, energy efficiency
- This year, we made a lot of changes to the structure of, and questions in, the survey to make it more actionable for communications staff

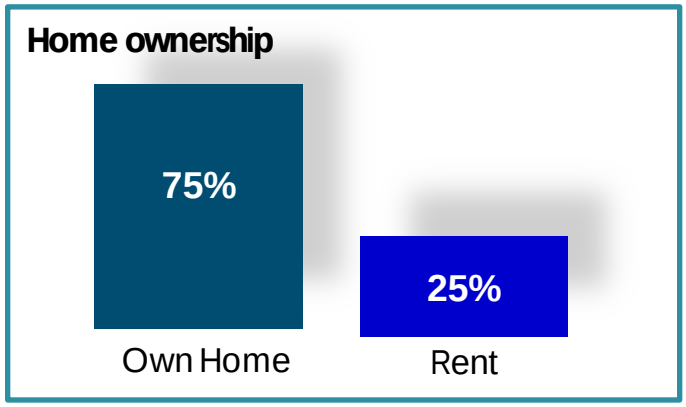
Survey Methodology

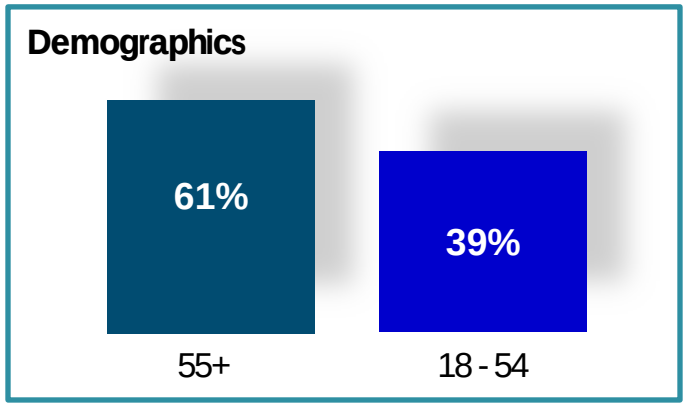
- 847 residential customers were surveyed
  - Combination of telephone and web surveys
- Interviews completed with household members responsible for making decisions about energy use in their household
- Weighting done to make results representative of general population, compare 2012 awareness levels to previous years

Respondent Overview

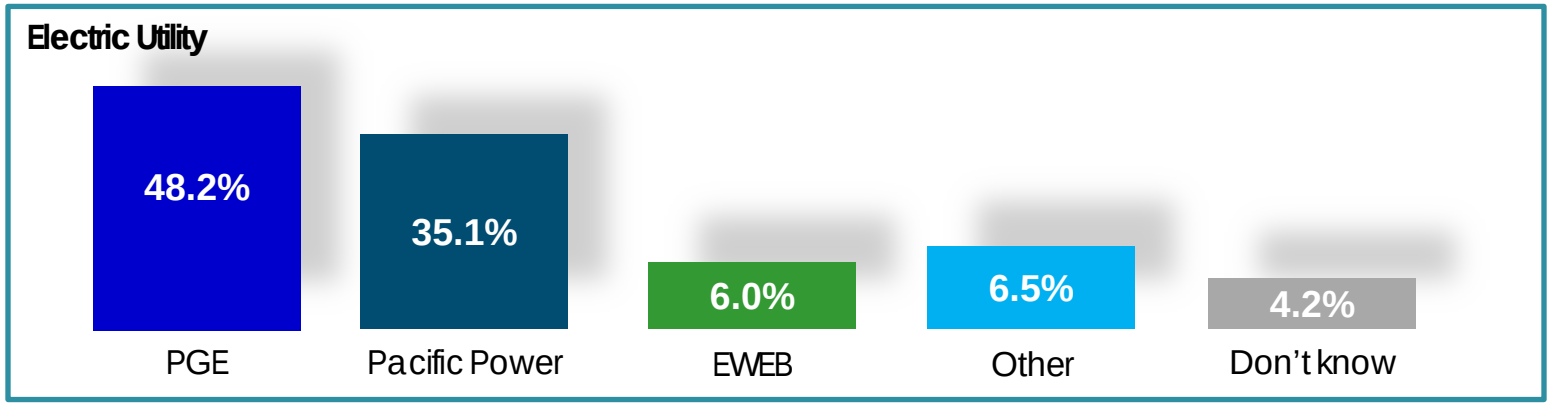


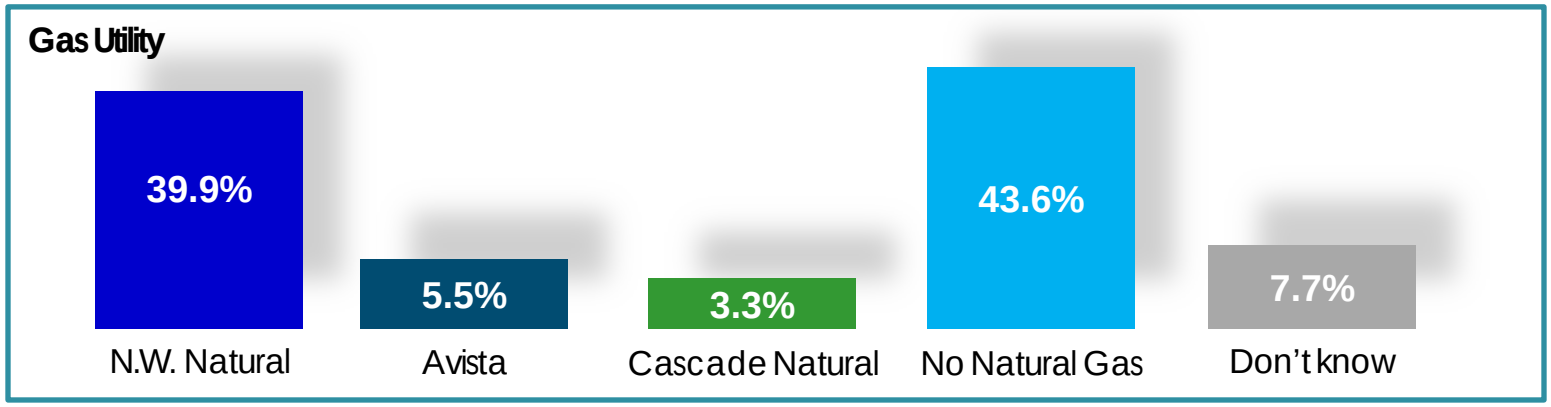




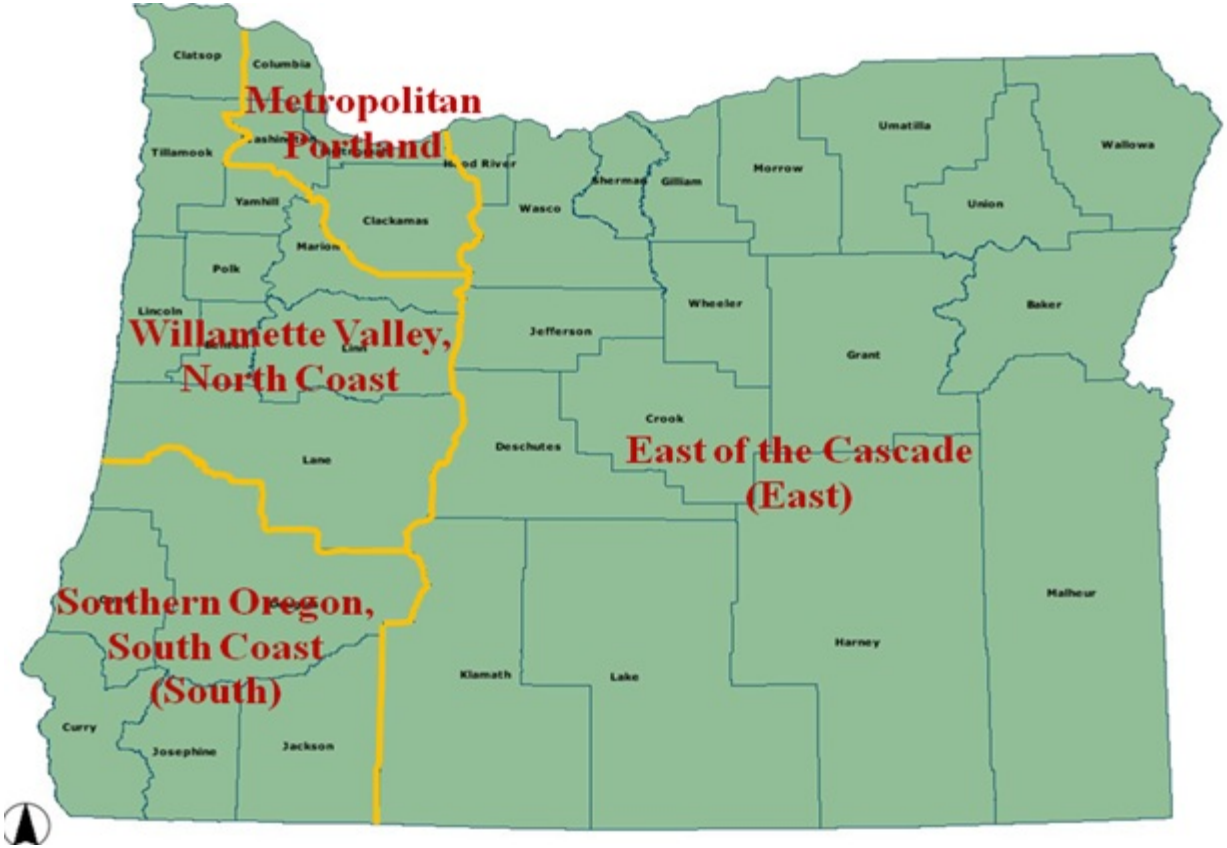


Respondent Utility





Respondent Region



- Portland Metro: 46%
- Willamette Valley/North Coast: 29%
- Southern Oregon: 14%
- East of the Cascades: 11%

Awareness

Most recommended organizations

- Energy Trust was reported as the most preferred source to get information about ways to conserve energy and reduce energy costs.
- Over half of respondents reporting Energy Trust as an energy information source reported it as their top choice.
- If they did not select Energy Trust in response to this question, we also asked if they had heard of Energy Trust of Oregon.

Recommended organizations	Mean priority 1st , 2nd, 3rd choice	% reporting 1st choice
Energy Trust of Oregon	1.65	56.8%
Pacific Power	1.74	46.2%
PGE	1.82	42.4%
NW Natural	2.03	27.2%
Oregon Dept. of Energy	2.06	28.5%
Avista	2.07	20.3%
Cascade Natural Gas	2.17	20.7%
Clean Energy Works	2.23	21.9%

Question: Suppose that a friend asked you to recommend an organization that could give them information about ways to conserve energy and reduce energy costs. Please select up to three organization from the following list in order of priority?

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Awareness, willingness to recommend

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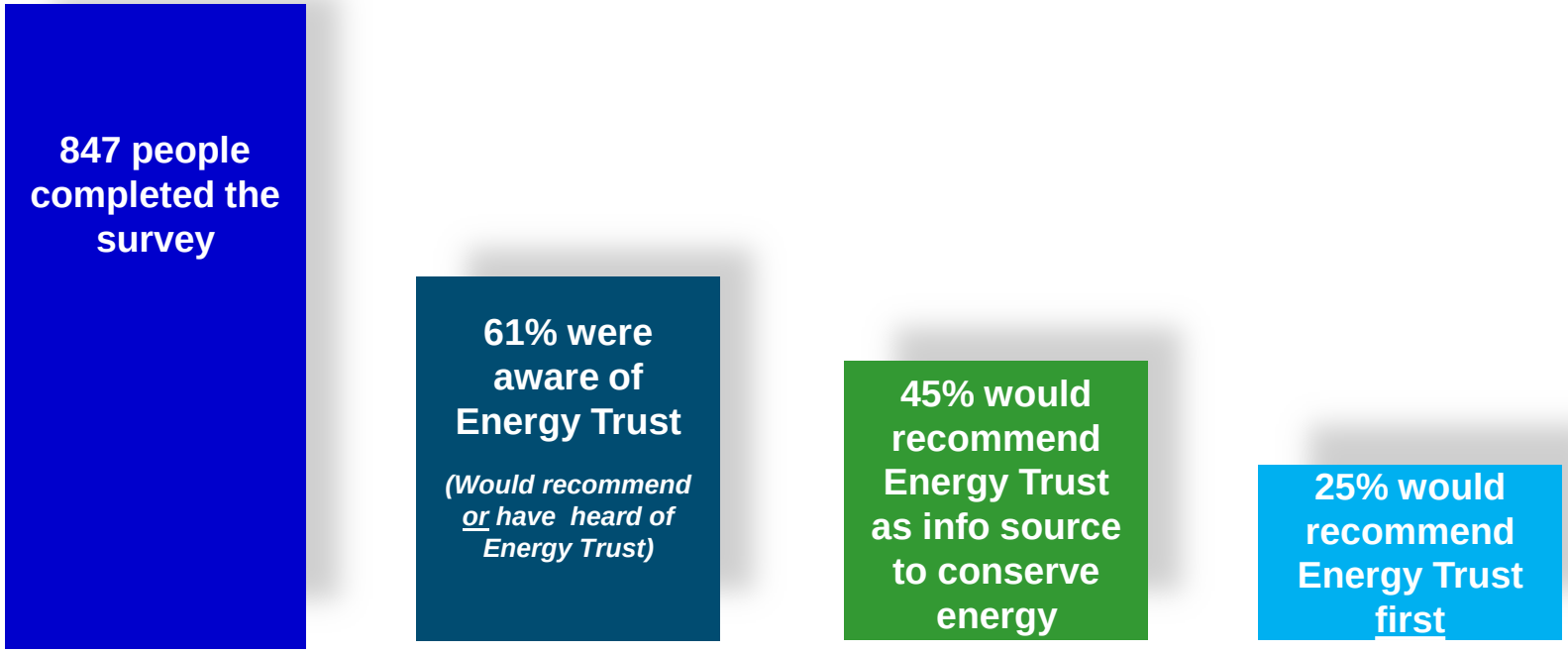


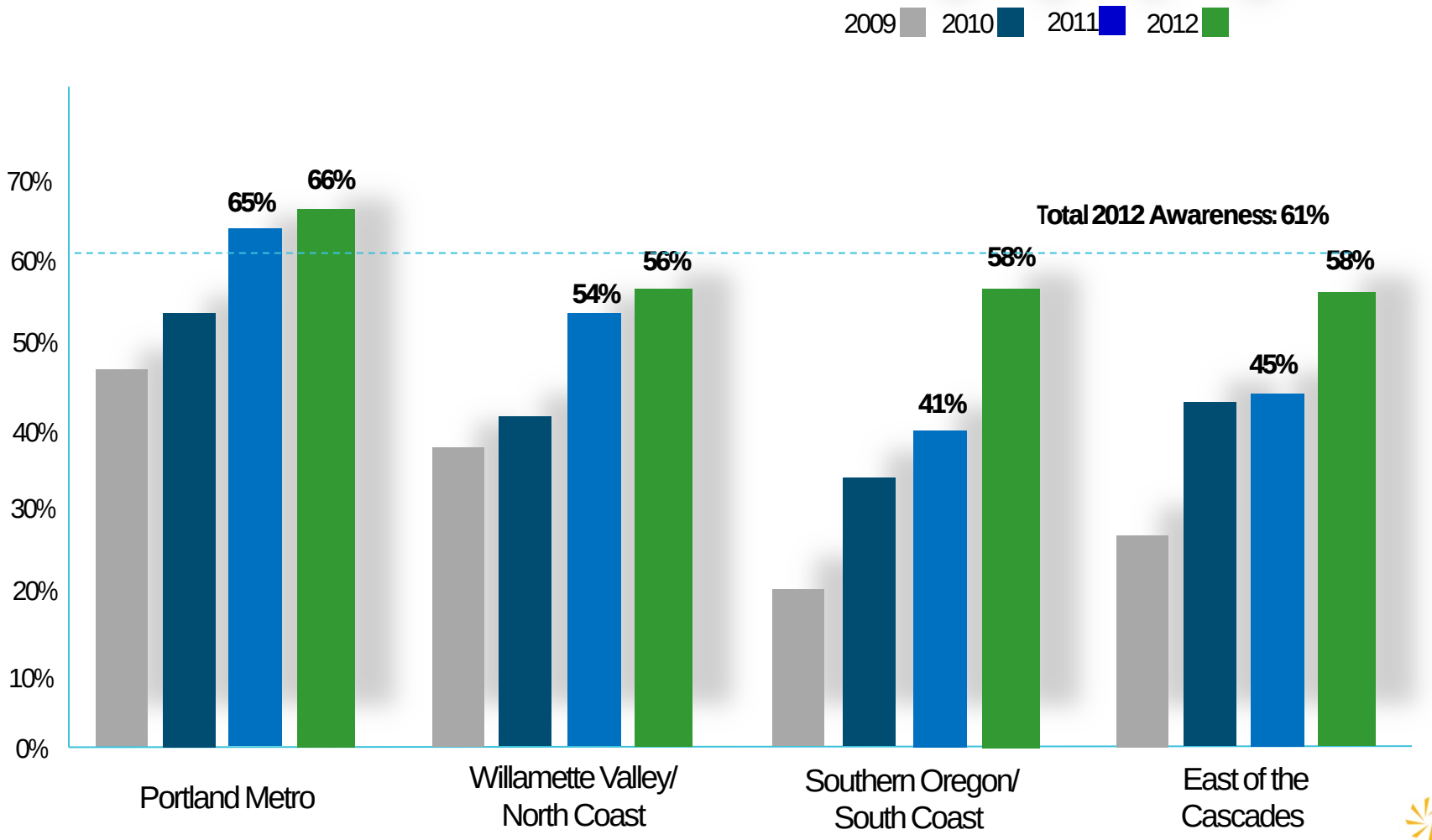
847 respondents

520 respondents

377 respondents

214 respondents

Awareness of Energy Trust by Region



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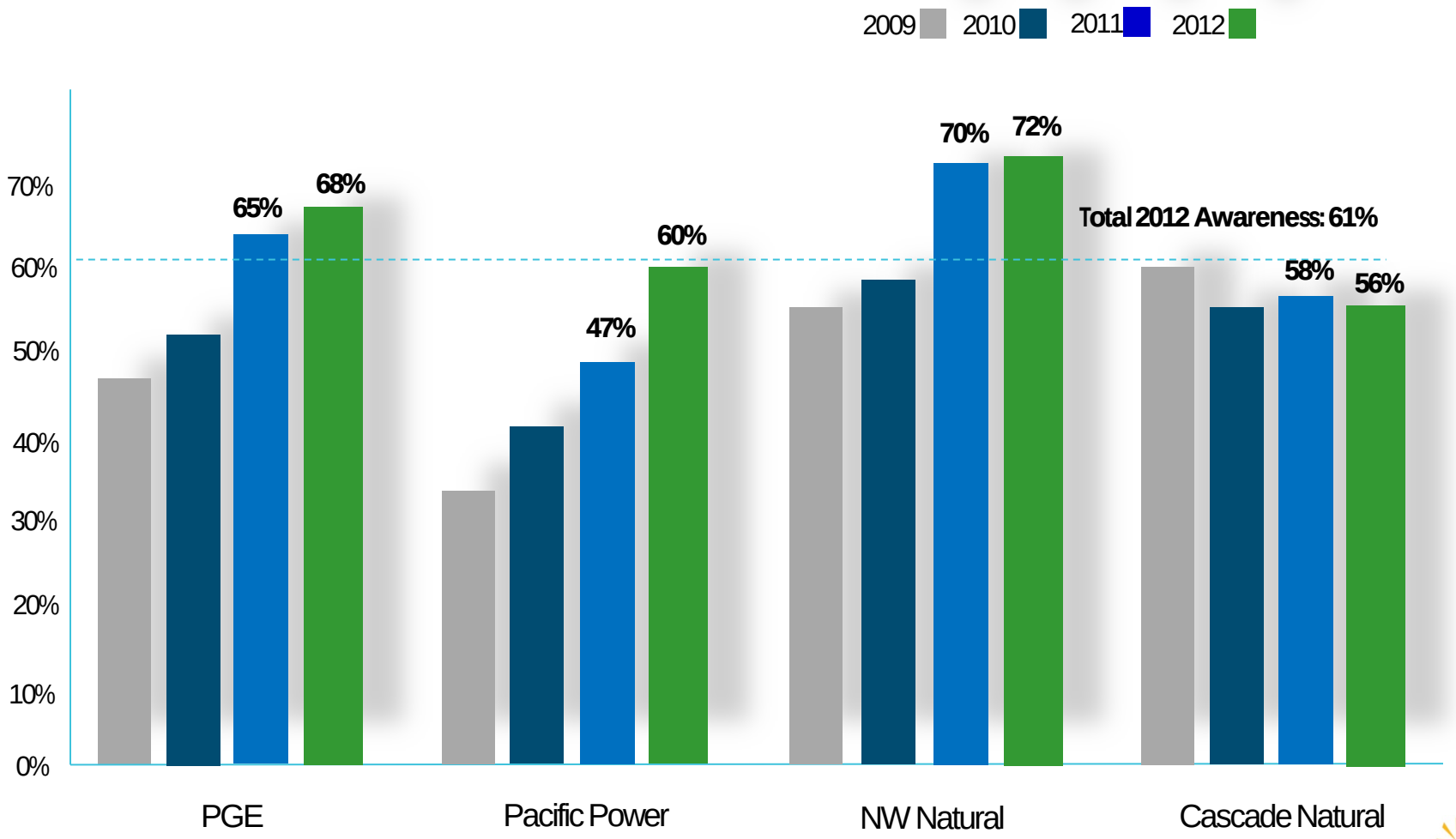
Awareness of Energy Trust by Utility



Awareness of Energy Trust offerings

- Awareness of Energy Trust offerings was highest for appliance incentives and refrigerator recycling (60% each)
- All residential offerings had at least 46% reported awareness
- Respondents who reported participating previously had higher awareness of all Energy Trust offerings than nonparticipants

Participation with Energy Trust

- Of the full set of respondents, 35% reported receiving services or incentives from Energy Trust
- Homeowners were much more likely to report having received services or incentives than non-homeowners
- Most commonly reported were receiving an Energy Saver Kit, appliance incentive, or recycling a refrigerator

How first learned about Energy Trust

- A significant portion of respondents who were aware of Energy Trust and had received Energy Trust services reported first learning of it from their gas and/or electric utility.
- A significant portion of respondents who were aware of Energy Trust and had not received Energy Trust services reported first learning of it through news media stories and advertising.

How first learned of Energy Trust	Total sample aware of Energy Trust	Have used Energy Trust services	Haven't used Energy Trust services
Through news media stories	21.2%	**11.4%**	**26.1%**
Through advertising	20.4%	17.1%	22.0%
From my gas and/or electric utility	16.0%	**28.6%**	**9.6%**
From a friend or acquaintance	11.0%	8.6%	12.2%
From a contractor or retailer	7.9%	**14.9%**	**4.3%**
Through research and investigation	5.25	**8.6%**	**3.5%**
Other			

Question: How did you first hear about Energy Trust? (those aware of Energy Trust)

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Response to Energy Trust attributes

- All respondents aware of Energy Trust reported strong agreement to the Energy Trust attributes presented to them.
- Respondents who had received Energy Trust services reported significantly higher scores than the total sample of respondents aware of Energy Trust.

Energy Trust Attributes	Total sample aware of Energy Trust mean score (1 – 5)	Received Energy Trust services mean score (1 – 5)	Total sample aware of Energy Trust Service (% 4 & 5)	Total sample used Energy Trust services (% 4 & 5)
Energy Trust is a credible information source for Oregon residents to learn about energy efficiency and renewable energy	4.14	4.57	70.6%	92.6%
Energy Trust serves the residents of Oregon well in their efforts to increase energy efficiency and reduce energy consumption	3.97	4.64	63.3%	88.6%
Energy Trust is a leader in energy efficiency and renewable energy	3.85	4.20	56.4%	77.2%

Question: Please let us know how strongly you agree or disagree with each of the following statements on a scale of one to five, where one means strongly disagree and five means strongly agree?

Attitudes and Actions around

Energy Efficiency

Attitudes about energy conservation

Current attitudes about conserving energy/reducing energy costs	Total sample	Have used Energy Trust	Have not used Energy Trust
I think I am more interested and take more actions to conserve energy and reduce energy costs than most people	41.9%	**55.4%**	**38.4%**
I think I am about average with most people in thinking about and taking actions to conserve the use of energy and reduce energy costs	54.3%	**44.6%**	**56.8%**
I think I am less interested in and take fewer actions than most people when it comes to conserving the use of energy and reducing energy costs	3.8%	-	4.8%

Shifts in interest in conserving energy/reducing energy cost past 12 – 18 months	Total sample	Have used Energy Trust	Have not used Energy Trust
My interest has increased	42.4%	38.3%	43.5%
My interest has stayed the same	55.0%	60.6%	53.6%
My interest has decreased	2.5%	1.1%	2.8%

Questions: Generally speaking, which of the following statements would best describe your current attitude about conserving energy and reducing energy costs in your home?
Which of the following statements best describes how your interest in conserving energy and reducing energy cost has changed over the last 12 – 18 months?

Messaging to motivate energy conservation actions

- "Save energy and save money" was reported as the most effective messaging to motivate people to pursue an energy-saving or renewable project.

Messaging options	Total sample mean score (1 – 5)	Total sample (% 4 & 5)
You can save energy and money	4.24	79.3%
Enjoy a comfortable and more energy efficient home	4.00	69.0%
Save energy and the planet	3.96	56.4%

Question: Please rate the following statements on how effective each is in convincing you to pursue an energy-saving or renewable project such as adding insulation or purchasing energy efficient appliances? Please rate on a 1 – 5 scale with 1 being very ineffective and 5 being very effective.

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Actions planned to reduce energy use

Actions to reduce home energy use	Total survey sample actions taken in past 12 months	Total survey sample actions planned to take in next 12 months
Installing compact fluorescent light bulbs	51.9%	**13.9%**
Replacing a clothes washer	16.5%	9.3%
Replacing refrigerator or freezer	14.4%	**11.5%**
Replacing a water heater	14.2%	8.4%
Recycling an old or extra refrigerator	13.5%	**10.7%**
Replacing windows	13.5%	**10.6%**
Adding insulation	11.0%	**11.3%**
Replacing a furnace	9.3%	4.8%
Conducting an energy audit	8.5%	**13.6%**
Adding/improving duct insulation	7.8%	6.5%
Replacing a heat pump	5.1%	2.5%
Adding a solar electric system	2.0%	6.5%
Adding a solar water heating system	0.9%	4.1%

Question: We are very interested in understanding what actions you have taken and/or are planning to take to reduce home energy use. Please indicate all that you have completed in the past 12 months and all that you are planning on completing in the next 12 months.

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Information from Energy Trust

Desired information to determine how to use less energy

Information that Energy Trust could to provide to help residents determine how to use even less energy	Energy Trust users	Non-Energy Trust users
Provide detailed information about rebates and cash incentives I might qualify for	26.3%	25.7%
Provide general information and suggestions to me on ways to reduce home energy use and save money	17.1%	25.1%
Recommend a specific “next step” I might take to reduce home energy use and save money	15.4%	14.3%
Provide an on-line questionnaire that I could complete to help me understand how energy efficient my home currently is	11.4%	14.9%
Provide information about how to finance my energy efficiency improvement	7.4%	6.0%
Provide referrals to contractors who are skilled in completing energy efficiency projects	6.9%	4.2%

Question: Energy Trust is interested in helping residents like you conserve energy and reduce energy costs. What is the most valuable information that Energy Trust could provide to you to help you determine how to use less energy?

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Interest in getting information from Energy Trust on ways to conserve energy (non-Energy Trust users)

- Approximately 50% of respondents who were not Energy Trust users reported being interested in getting information on ways Energy Trust could help them conserve energy and reduce energy costs.
- Respondents who did not own their home reported being statistically more interested in getting energy conservation information than homeowners.

Would like information from Energy Trust	Total survey sample Non-Energy Trust users	Own home	Don't own home
Yes	49.9%	**46.6%**	**56.8%**
No	42.1%	**45.2%**	**35.3%**
Don't know/not sure	8.0%	8.2%	7.9%

Question: Based on the description of Energy Trust, would you be interested in learning more about how it can help you conserve and reduce energy costs?

Desired way to receive additional energy savings information

- Respondents reported a slight preference to receive additional energy savings information directly from Energy Trust, although the majority of respondents were comfortable about getting information from either Energy Trust or their local electric and/or gas utility.

Desired way to receive additional suggestions on ways to reduce energy use	Energy Trust users	Non-Energy Trust users
Directly from Energy Trust	28.6%	26.3%
From my local electric and/or gas utility	9.1%	14.9%
Either source would be fine	55.4%	55.5%
Other	1.1%	3.3%
Don't know/not sure	5.7%	-

Question: How would you like to get this information from Energy Trust to help you determine how to use even less energy?

Key Findings

Key Findings

- Overall awareness of Energy Trust has increased vs. previous years in each of the four regions and with all but one utility
- Energy Trust is well respected and trusted by residents in each of the four regions. It is especially well respected and trusted by those that have used or received its services
- Partner utilities and retailers/contractors play a significant role in getting residential customers to take advantage of Energy Trust offerings

Key Findings, continued

- Over 70% of past users of Energy Trust offerings report a good understanding of the breadth of Energy Trust offerings
- Approximately 50% of those reporting to be aware of Energy Trust, but who are non-users, also report a solid understanding of the breadth of Energy Trust offerings
- Saving energy and money are the main reasons that residential customers report take energy conservation actions in their household