

B O N N E V I L L E
P O W E R A D M I N I S T R A T I O N



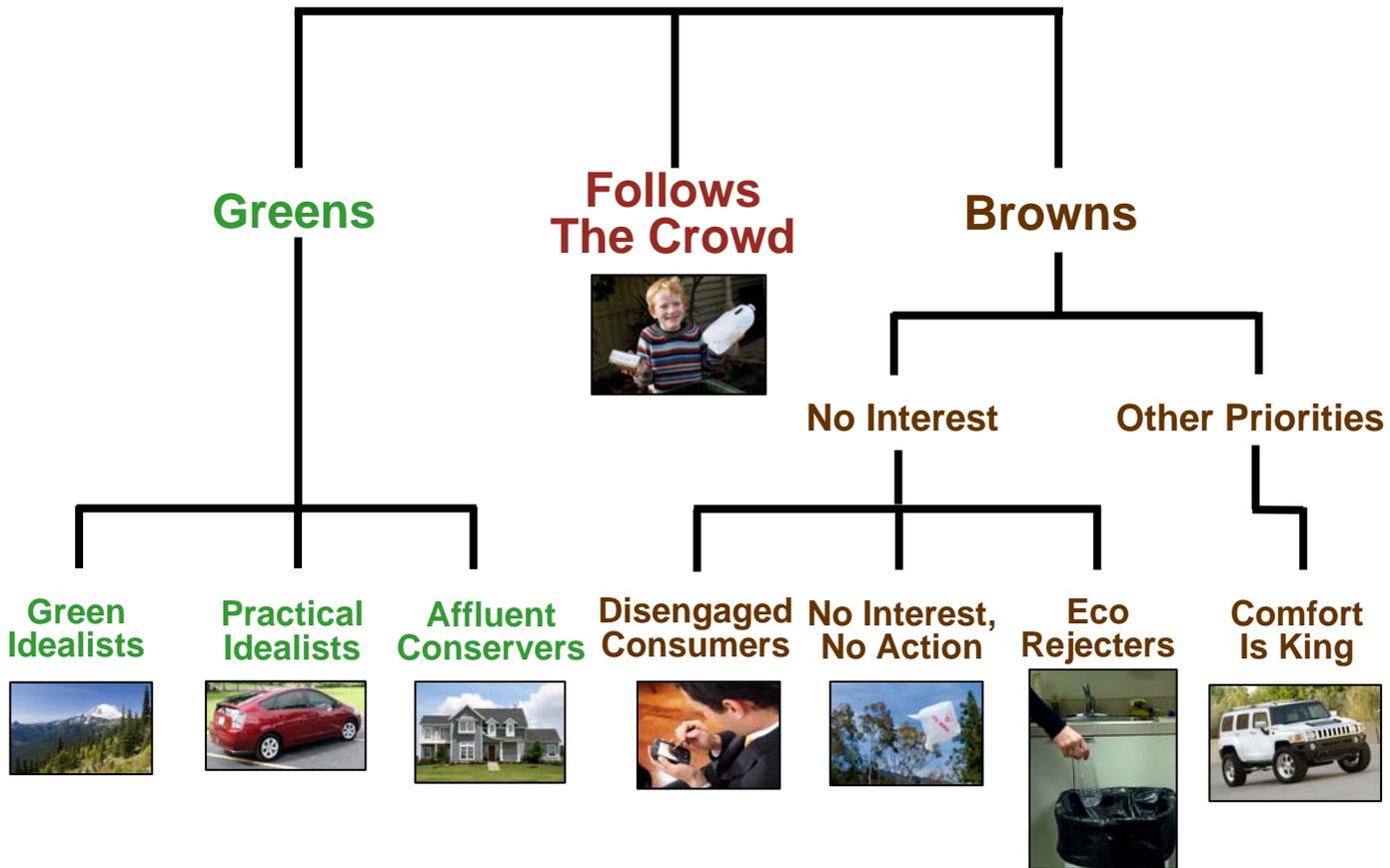
Residential Segmentation Research

Personalizations

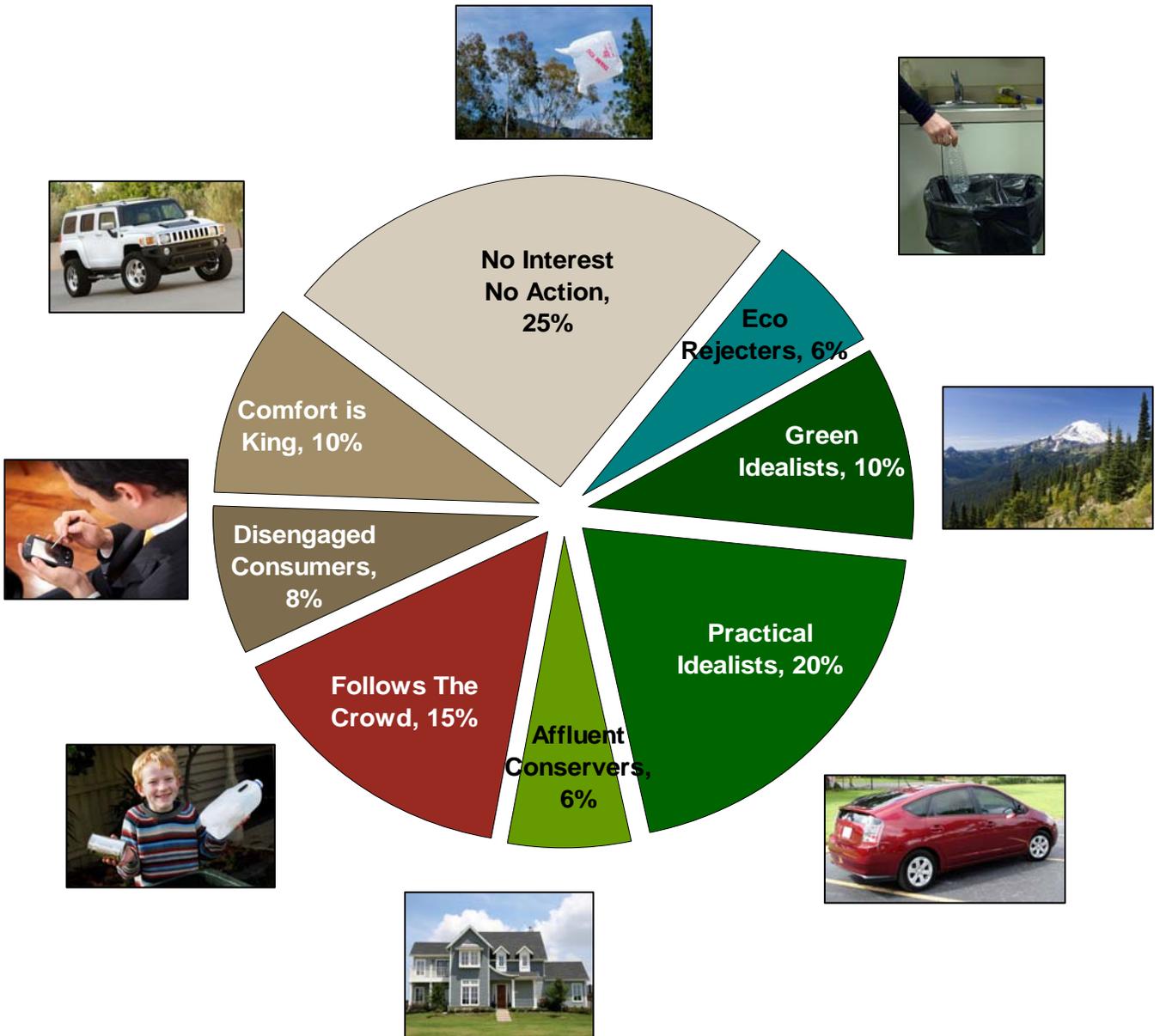
**Eastern/Central WA, Eastern OR & CA
Region**

March 2009

BPA Segment Summary



Summary of Segment Sizes



BPA Customer Segments – The “Greens”

■ Green Idealists, 10%

- ❑ Most concerned with conserving, controlling energy use and costs, the environment and the environmental impact of energy use
- ❑ Very aware of connection between conservation activities & their role in protecting the environment
- ❑ “Green” utility is very important; most positive opinions of their local utility willing to accept higher costs for utility’s green activities
- ❑ Conservation activities above average, similar to the Practical Idealists; great deal of interest in “new programs” tested in the survey, more so than any other segment
- ❑ Majority are women; lowest income; smaller homes than most; largest proportion of renters (tied with the No Interest, No Action segment)



■ Practical Idealists, 20%

- ❑ Very concerned with conserving, controlling energy use and costs, the environment and the environmental impact of energy use (slightly less so than Green Idealists)
- ❑ Very aware of connection between conservation activities and their role in protecting the environment – but, slightly less so than Green Idealists
- ❑ Above average level of conservation activities - Greater or equal participation in activities compared to Green Idealists though fewer appliances purchased in this segment were energy efficient compared to Green Idealists
- ❑ “Green” utility is very important; impressions of their local utility lower than that of Green Idealists, though in the satisfactory range
- ❑ Some interest in new programs, but much lower than for Green Idealists
- ❑ Larger proportion of home owners (97%) than the Green Idealists; homes are larger than most segments



■ Affluent Conservers, 6%

- ❑ One of most affluent; all are home owners; homes are larger than most segments (all with 3+ bedrooms)
- ❑ Perceptions of natural gas bill suggest they pay significantly more each month than most other segments
- ❑ Least concerned / lowest awareness among the “green” segments with conserving, energy costs, and protecting the environment
- ❑ Despite less awareness and concern, do participate in conservation activities at a rate similar to Green and Practical Idealists; a slightly above average number of CFLs installed, energy efficient appliance purchases, rebate program participation and “other” energy efficiency measures taken (i.e. upgrading insulation)
- ❑ Cost savings still primary motivator behind energy efficient appliance purchases
- ❑ Similar to Practical Idealists, more interested than most in a “green” utility; impressions of their local utility are in satisfactory range, similar to the Practical Idealists



BPA Customer Segments – In the Middle

Follows The Crowd, 15%

- ❑ “Average” BPA (non-Puget Sound area) customer demographically – slightly more women responders, 55+ years old, most living in single-family detached homes that they own, and incomes of about \$52K
- ❑ Saving money and controlling energy costs very important, though not to exclusion of at least some concern with environment / impact of energy use on environment
- ❑ Most see recycling as having biggest environmental impact, followed by installing additional or upgraded insulation or windows
- ❑ Participation in conservation activities (CFLs, energy efficient appliance purchases, etc.) is below average – less than the “green” segments, but doing more than some the “brownest” segments
- ❑ Potential cost savings resulting from conservation activities more important than the environment
- ❑ “Green” utility is much less important than for the green segments
- ❑ Lower opinions of their local utility than the “Greens” though better than some of the brown segments



BPA Customer Segments – The “Browns”

Disengaged Consumers, 8%

- ❑ Neither controlling energy costs nor concerns with the environment drive this segments' thinking or behaviors
- ❑ Unengaged when making energy product (or other product) purchase decisions
- ❑ Less likely than most “Browns” to see connection between energy conservation activities & protecting the environment
- ❑ Actual conservation activities, however, slightly above the “average” BPA (non-Puget Sound area) customer, doing more than most “Browns” but less than most “Greens”
- ❑ “Green” utility is less important than the green segments, but more so than most of the brown segments; has some of the lowest opinions of their local utility
- ❑ Demographically similar to the “average” BPA (non-Puget Sound area) customer; most own single-family homes with 3+ bedrooms, have incomes of about \$57K, and perceive their electricity bills to be about \$100 a month in the summer.



No Interest, No Action, 25%

- ❑ 2nd least concerned with controlling energy use / energy costs and the environmental impact; least likely to notice impact of any changes made
- ❑ Do not see a strong connection between conservation, recycling activities, transportation choices and protecting the environment
- ❑ Conservation activities lower than many segments, particularly in terms of CFL usage, rebate program participation, and “other” conservation activities around the home
- ❑ Very low interest in the “new” programs tested in the survey
- ❑ Looking for their utility to keep costs as low as possible, not to be “green”; opinions of their local utility are low, though better than Eco Rejecters
- ❑ One of lowest earning; one of lowest proportion of home owners / highest proportion of renters; smallest homes (most 1-2 bedrooms); electricity use only slightly below average, despite smaller residences



Eco Rejecters, 6%

- ❑ Least concerned with controlling energy use / energy costs & environmental impact of these choices
- ❑ Most deny any connection between their actions at home or transportation choices they make and the environment
- ❑ One of the least likely segments to use CFLs or to have purchased an energy efficient appliance in the last 12 months; lower rebate program participation than most segments
- ❑ Extremely low interest in the “new” programs tested in the survey
- ❑ “Green” efforts by the utility is not valued by this segment; satisfaction with their utility lower than for any other segment; utility that keeps cost as low as possible is paramount
- ❑ Vast majority are men; most own slightly larger than average sized homes (most with 3 bedrooms); one of the most affluent segments (\$78K); and about average energy use



BPA Customer Segments – The “Browns”

Comfort is King, 10%

- ❑ All are home owners; largest homes with most having 4+ bedrooms; more affluent than most
- ❑ One of least concerned / aware in terms of conserving, energy costs, and protecting the environment (though more concerned / aware than Eco Rejecters)
- ❑ Do not see a strong connection between energy conservation and protecting the environment; a significant number make a stronger connection between recycling activities and environment (though, again, more so than the Eco Rejecters)
- ❑ Do participate in conservation activities at a rate similar to the average BPA (non-Puget Sound area) customer; though slightly greater use of CFLs and less than average participation in “other” home conservation activities, like installing upgraded insulation or windows; cost savings primary motivator
- ❑ Unlikely to notice any cost savings from conservation actions taken
- ❑ Not looking for their utility to be “green” or to encourage conservation; satisfaction with local utility is lower than most segments, though higher than for the Disengaged Consumers and Eco Rejecters



Green Idealists

Jenn is 57 years old and lives near Twisp, WA, where she works in a local bookstore. Paul, her husband, passed away 2 years ago, and she still lives in the 2-bedroom, 1930's house they shared together. Jenn loves living outside of the city. She loves her garden and her "dirt road commute" into town. Jenn has been incorporating conservation activities into her lifestyle for a long time, by recycling, turning off lights and adjusting her thermostat. Jenn believes it's her social responsibility to conserve energy resources and limit her impact in any way she can. She is happy to live in a region where her local utility encourages it's customers to conserve, provides information on energy efficiency programs and even works to develop new conservation programs to try.

In her utility bill last month, Jenn came across a list of new programs her utility was looking to try. She thought they all sounded interesting but the one that stood out the most was a program offering incentives for buying and using CFLs. Jenn has never used CFLs before, but she has seen them on display at the discount store and wondered if switching out her light bulbs for these would be a good way to conserve even more energy.

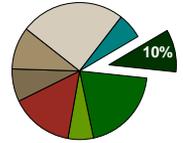
Jenn is definitely ready to take more steps to conserve at home. She has been regularly reviewing her home energy usage and is worried, because she hasn't noticed much savings. She doesn't have a lot of income, so she has to find energy efficiency adjustments that don't set her back a whole lot up front. Several years ago, Paul added insulation in the attic and it seemed to help a little. Jenn hopes she will be able to find a way to barter with someone in the community (she makes great jams, jellies, and pies, which are a big hit at the local farmer's market), for help installing more insulation and upgrading her windows.

Jenn has been seeing a lot of TV ads, lately, for "Energy Star" appliances, and the amount of money they save on monthly energy costs. She can't afford one at the moment, but she is starting to tuck some money away, so that she can eventually replace her furnace with an energy efficient model. The furnace is the appliance she uses the most and she is sure it contributes a lot to her monthly bill. She's also heard that there are sometimes rebates offered for purchasing energy efficiency appliances, and she is very curious to learn more. She isn't sure if her utility offers these rebates, but if they do, she hopes it will be something she can participate in.

Jenn worries a lot about money, especially now that she is just one person living in a two-bedroom house, but she is very optimistic and knows she can get by. If she had her way, of course, she would weatherize her whole house, buy brand new energy efficiency appliances and maybe even get one of those fancy hybrid cars. Because she can't ignore money concerns she looks to her utility to continue doing it's part, to provide renewable clean energy and continue supporting and guiding energy conservation activities, but make sure to do it all in a way that still keeps customer costs low.

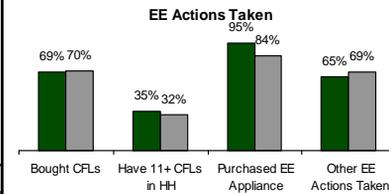


% of Population (E.C.WA, E.OR, CA Region)



Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
<ul style="list-style-type: none"> Setting heating or cooling thermostats to use less energy Recycling paper, cans, bottles and plastics Installing additional or upgraded insulation or windows Using mass transit instead of driving Replacing regular light bulbs and fixtures with EE ones Driving an electric/ hybrid vehicle Replacing major appliances with more EE ones 	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> Converting electric or fuel oil heating to natural gas 	
MOST likely to participate in (Q19)	
<ul style="list-style-type: none"> Program that provides incentives for using CFLs Program for installing a home device that allows you to monitor electricity usage Home weatherization program Program w/ incentives to increase efficiency of existing heating/cooling system Program w/incentives to purchase EE products Program that provides incentives to purchase EE heating or cooling system 	
LEAST likely to participate in	
<ul style="list-style-type: none"> None 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> It's important to use less energy in your home to lower monthly expenses Believe it is socially responsible to limit use of electricity It's important to find ways to control energy costs Pay a lot of attention to energy-related issues because they affect my home and the country as a whole You constantly look for ways to save on energy costs It's worth spending more for an EE electric appliance/device Very concerned about environmental effects of electric plants The long term threat of global warming/climate-change is real and potentially catastrophic You want appliances that are simple to use 	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> None 	

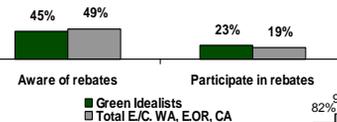
My Utility Company	
MOST Important Utility Company Functions (Q29)	
<ul style="list-style-type: none"> Actively encourage customers to participate in energy and cost savings programs Do everything possible to supply renewable, clean energy Operate business completely environmentally-friendly 	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> Provide more online options for you to conduct business at the utility's website 	



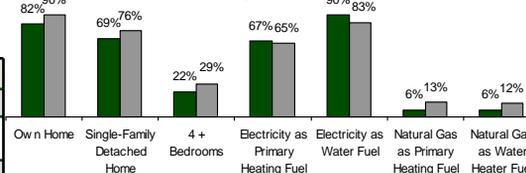
Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
<ul style="list-style-type: none"> Positive impact on environment from less energy Cost savings from reduced electricity usage Discounts for buying an EE appliance Purchase price 	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> Discount stores Retail grocery stores 	
Key Attitudes about Shopping (Q25)	
<ul style="list-style-type: none"> Carefully research product specifications, features and reviews Someone in HH does a lot of do-it-yourself projects to save money 	



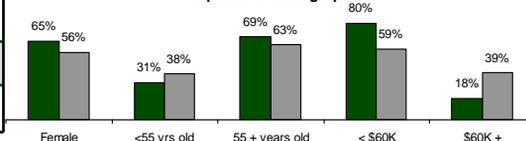
Rebate and Program Participation



Home Demographics



Respondent Demographics



Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> Information included with your electric bill Other promotional mailing 	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> Information included with your electric bill Other promotional mailing 	
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> Farmers market Rodeos or county fairs 	



Segment Implications – Green Idealists



Marketing Effort

- ❑ Probably the easiest to market to as this segment will be receptive to a variety of messages from the importance and social responsibility of energy conservation to cost savings. Furthermore, satisfaction with their utility is high, making them likely to trust their utility as a reliable source for energy conservation suggestions.

Potential Load Impact

- ❑ Given the size of the homes in this segment, and the overall segment size (10%) this segment is a smaller proportion of the load than some of the other segments. Despite this, they are actively demonstrating energy efficiency behaviors suggesting they will continue to be receptive to new energy programs and take action.

Receptivity to Future Conservation Programs

- ❑ This segment is very receptive to all six of the conservation programs tested, indicating a strong likelihood to participate if offered.

Going Forward

- ❑ Despite this segment's "green-ness" there is still a good deal of potential ground to be gained in terms of greater participation in rebate programs and CFL use. However, this segment's significantly lower mean income could present a barrier to participation in certain programs.
- ❑ Marketing to the female head of household will make the most sense given they are more likely to be solely responsible for many energy related decisions, or at the very least share responsibility with a male head of household.

Practical Idealists

Susan, 45, and her husband Paul, 47, live between Elgin and Union, OR, having moved from Salem a year ago. Their teenage daughter, 16-year-old Laurie, wasn't too excited about the move, but Susan and Paul were looking for a fresh market for their landscaping and home-renovation business, and they were excited by all of the historic buildings and Victorian style homes in need of work in both Union and Elgin. Susan and Paul found a great deal on a 4-bedroom "fixer upper" and they are looking forward to applying their trade to their own home as soon as possible.

Having moved from a 1,700 square foot home in Salem, to a 3,400 square foot home, they really noticed the difference in energy costs when they first moved in. They were always careful before with their energy use for environmental reasons (it's really the socially responsible thing to do in their minds), but now they have to pay even more attention to the things they do in their home that use energy, in order to keep costs down.

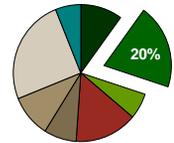
Currently Paul is working to upgrade the insulation and windows in the 3,400 square foot home, to begin reducing their energy consumption. Susan has replaced most of their regular light bulbs with CFLs and installed low-flow shower heads in their 2.5 bathrooms. Whenever they remember, they turn off the lights when their not in a room and turn down the thermostats at night, and Susan has put Laurie in charge of the family recycling. Susan knows all these adjustments make a contribution to protecting the environment, something her family deeply values, and it helps them keep costs low.

While they have noticed some difference, Susan is hoping to see more savings in their energy bill. She is starting to look at upgrading their refrigerator to an "Energy Star" model and is considering getting their furnace tuned-up to operate more efficiently. If she does get an energy efficient refrigerator, Susan is curious if there will be a rebate available through the local utility. Earlier in the year, Susan submitted rebates for the CFLs she bought and has signed up for a new program the utility is rolling out, that offers incentives for purchasing and using CFLs.

Susan loves that the utility is actively encouraging customers to conserve energy and supporting them with new programs. Susan chooses to conserve energy because it helps the environment, and her pocketbook, but she appreciates that her utility offers extra incentives and encouragement for her choices. If her utility can continue to work to supply renewable, clean energy and support conservation, all while keeping her energy costs low, Susan will value the partnership even more.

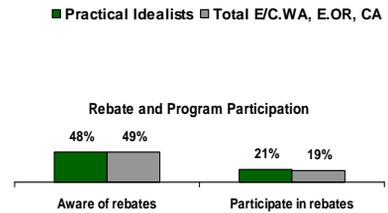
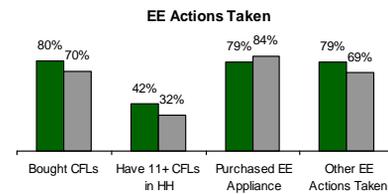


% of Population (E/C.WA, E.OR, CA Region)



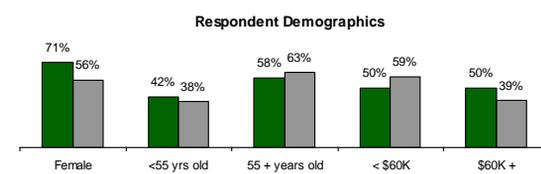
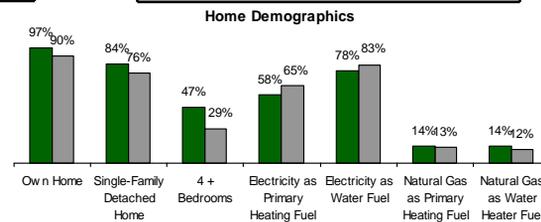
Energy-Use Actions and Attitudes
Actions Perceived to Be MOST Impactful (Q23)
<ul style="list-style-type: none"> Recycling paper, cans, bottles or plastics Installing additional or upgraded insulation or window Setting heating or cooling thermostats to use less energy Using mass transit instead of your car Replacing regular light bulbs and fixtures with EE ones
Actions Perceived to Be LEAST Impactful
<ul style="list-style-type: none"> Converting electric or fuel oil to natural gas
MOST likely to participate in (Q19)
<ul style="list-style-type: none"> Program that provides incentives for using CFLs
LEAST likely to participate in
<ul style="list-style-type: none"> Program w/incentives to purchase EE products Program that provides incentives to purchase EE heating or cooling system Program for installing a home device that allows you to monitor electricity usage Home weatherization program Program w/ incentives to increase efficiency of existing heating/cooling system
Energy-Use Attitudes – MOST Agree (Q21, Q2)
<ul style="list-style-type: none"> It's very important to find new ways to control energy costs Believe it's socially responsible to limit use of electricity Pay a lot of attention to energy-related issues because they affect my home and the country as a whole It's important to use less energy in your home so that you can lower your monthly expenses It's worth spending more for an EE electric appliance/device
Energy-Use Attitudes – LEAST Agree
<ul style="list-style-type: none"> Always purchase most advanced products The most important thing about heating/AC is comfort It's worth spending money for highest quality products Prefer customizable products that meet exact needs It's important for appliances to save time/effort

My Utility Company
MOST Important Utility Company Functions (Q29)
<ul style="list-style-type: none"> Do everything possible to supply renewable, clean energy Actively encourage customers to participate in energy and cost savings programs Operate its business in a completely environmentally-friendly manner
LEAST Important Utility Company Functions
<ul style="list-style-type: none"> Provide more online options for you to conduct business at the utility's website



Communication
BEST Way to Hear About EE Programs (Q22)
<ul style="list-style-type: none"> Information included with your electric bill
How Learned About EE Programs (Q18)
<ul style="list-style-type: none"> Information included with your electric bill
Local Events Attended in Last 12 Months (Q28)
<ul style="list-style-type: none"> Farmers market Neighborhood or community events

Shopping Habits and Attitudes
MOST Important When Purchasing New Appliance (Q20)
<ul style="list-style-type: none"> Cost savings from reduced electricity usage Positive impact on environment from less energy
Stores Shopped Most in Past Month (Q24)
<ul style="list-style-type: none"> Discount stores Retail grocery stores
Key Attitudes about Shopping (Q25)
<ul style="list-style-type: none"> Generally prefer to shop in-store rather than online



Segment Implications – Practical Idealists



Marketing Effort

- ❑ One of the easiest segments to market to, second only to the Green Idealists, Practical Idealists would be receptive to a variety of messages from the importance and social responsibility of energy conservation to cost savings.

Potential Load Impact

- ❑ Houses in this segment are larger than most, and perceptions of energy bills are higher than many segments suggesting more potential conservation behaviors or end uses that could be impacted.
- ❑ This segment is also the second largest, presenting a significant number of regional customers that could be impacted.

Penetration

- ❑ There's a good deal of interest in CFLs, both in terms of usage and participating in CFL rebate programs.

Going Forward

- ❑ This segment's history of engaging in energy efficiency behaviors suggest they will be likely to continue doing so in the future, making them a lucrative segment in terms of energy savings.
- ❑ There is potential ground to be gained in terms of greater participation in appliance rebate programs and additional education, focusing on the benefits of energy efficient appliances and the rebate programs, is needed.

Affluent Conservers

Linda, age 55, and her husband Jim, 58, live in Port Orford, OR, where Linda and Jim own and run a successful diner/gift shop.

Linda and Jim built their three-bedroom, 2,600 square foot home about 20 years ago and they still love it. They built it with the idea that they would have several children – but their goals changed after they invested their time and resources in starting a business. Over time, the diner grew to be a successful part of the tourism circuit and Linda and Jim have since been able to invest money in improving their home.

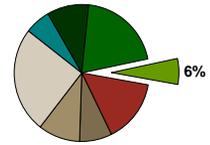
Many of the improvements have been cosmetic, installing a new deck with hot tub, landscaping the property, but one structural upgrade they did undertake was installing new insulation and windows. Jim chose this renovation because he felt it would be a relatively painless way to lower their energy use and associated monthly bill. Reviewing their energy usage isn't something he does constantly, but he keeps close enough tabs to know that he'd like to see it lower, not because they need to worry about money, but because he's secretly planning a European vacation for Linda next year. The next renovation item on his list is installing low-flow shower heads, but he hasn't started pricing them yet.

Jim and Linda aren't convinced that global-warming is a real threat, but they do think limiting their energy usage is socially responsible and worthwhile pursuing to a certain degree. For her part, Linda makes sure to turn off the lights when she leaves a room, and adjust the thermostats to minimize energy used for heating and cooling. Recently, Linda went a step further and replaced their washer and dryer with energy efficient models. They cost a little more up front, but she carefully researched the models, and grilled the sales staff, to make sure she bought what would bring her the most cost savings in energy reduction down the line. Plus, her local utility was offering a rebate program for purchasing energy efficiency appliances, which allowed her to regain some of the money spent.

Jim and Linda are pleased that their local utility is actively encouraging it's customers to participate in energy saving programs, by providing rebates and incentives as well as easy access to information on the topics. In a utility pamphlet recently, Linda read about some new energy efficiency programs the utility was rolling out and she highlighted a couple for Jim to look at. One was an incentive program for upgrading their heating/cooling system (something she thought Jim might like) the other was an incentive program for buying and using CFLs. Linda purchased a few CFLs in the past, but didn't notice any savings from using them. She thinks she might need to replace all her light bulbs with CFLs, to really see the benefit, but doesn't really want to throw that much money at an experiment. If there were an incentive for buying CFLs, then she might consider the lighting overhaul. Overall, Linda is very satisfied with the utility, working to supply renewable, clean energy and offering fair and reasonable rates. She hopes the utility will be able to continue to operate in an environmentally friendly manner, all while keeping costs low.

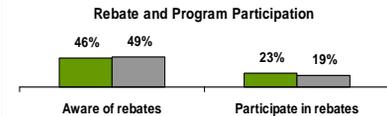
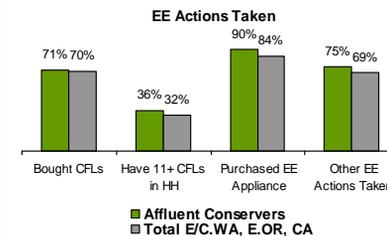


% of Population (E/C.WA, E.OR, CA Region)



Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
<ul style="list-style-type: none"> Setting heating or cooling thermostats to use less energy Recycling paper, cans, bottles and plastics Installing additional or upgraded insulation or windows Replacing regular light bulbs and fixtures with EE ones Replacing major appliances with more EE ones 	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> Converting electric/oil heating to natural gas Driving an electric/hybrid vehicle Using mass transit instead of driving 	
MOST likely to participate in (Q19)	
<ul style="list-style-type: none"> None 	
LEAST likely to participate in	
<ul style="list-style-type: none"> Program for installing a home device that allows you to monitor electricity usage Home weatherization program Program with incentives for purchasing highest efficiency heating/cooling system Program w/incentives to buy EE home electronics 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> It's important to use less energy in your home so that you can lower your monthly expenses You want appliances that are simple to use. Believe it's socially responsible to limit use of electricity You are very optimistic about your own future It's important to find ways to control energy costs It's worth spending more for an EE electric appliance/device 	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> Long term threat of global warming is real and potentially catastrophic Very concerned about environmental effects of electric plants Always purchase most advanced products It's worth spending more for the highest quality products Prefer customizable products that meet exact needs It's important for appliances to save time/effort The most important thing about heating/AC is comfort 	

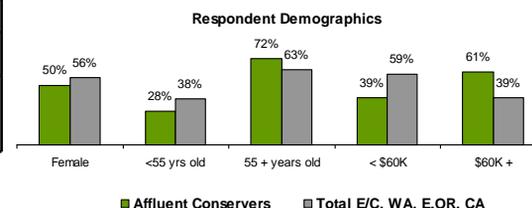
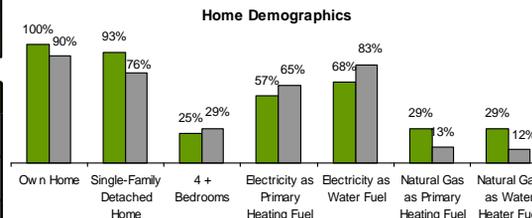
My Utility Company	
MOST Important Utility Company Functions (Q29)	
<ul style="list-style-type: none"> Do everything possible to supply renewable, clean energy. Actively encourage customers to participate in energy and cost saving programs. Operate its business in a completely environmentally friendly manner. 	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> Provide more online options for customers on utility website 	



Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
<ul style="list-style-type: none"> Cost savings from reduced electricity usage Discounts available The features and functions included 	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> Discount stores Local pharmacy or drug stores 	
Key Attitudes about Shopping (Q25)	
<ul style="list-style-type: none"> Carefully research product specifications, features and reviews Generally prefer to shop in-store rather than online 	



Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> Information included with your electric bill 	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> Other promotional mailing 	
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> Farmers markets Rodeos or county fairs 	<ul style="list-style-type: none"> Neighborhood or community events



Segment Implications – Affluent Conservers



Marketing Effort

- ❑ Affluent Conservers will be a bit more difficult to market to, requiring some education on how energy saving programs can help them and the environment. Messages related to “social responsibility” and “environmental protection” will have some traction with this segment, though additional education is required. A focus on saving money, however, will probably play less well unless in conjunction with an energy efficient appliance purchase.

Potential Load Impact

- ❑ Houses in this segment are larger than many and there is a very high penetration of natural gas, with very low perceived electricity usage. Customers in this segment are also likely to have the financial means to make energy efficient improvements to their homes, assuming they saw the value of it. At only 6% of the total regional customer base, however, it is one of the smallest segments.

Penetration

- ❑ Interest in the potential energy conservation programs tested is high (second only to Green Idealists). There is a good deal of interest in participating more in rebate programs for CFLs and energy efficient appliances, as well as improving home heating or cooling systems.

Going Forward

- ❑ This segment’s history of engaging in energy efficiency behaviors suggest they will be likely to continue doing so in the future. Furthermore, if they understood the impact of these choices they might be likely to increase these conservation activities, making them a potentially lucrative segment in terms of energy savings despite their smaller population size.
- ❑ Education focusing on the importance of CFLs, raising / lowering thermostats, and energy efficient appliances could be useful for this segment.

Follows The Crowd

Diane is 55 years old and lives outside of Ephrata, WA, where she has been a teacher in the Ephrata School District for 21 years. She and her husband Mitch, 56, and their son Lucas, 16, live in a three-bedroom two-story house with a beautiful garden that Diane loves to work in. Mitch works for a local nursery as a greenhouse manager and at least once a week brings home some new or rare plant, like a succulent or rose hybrid. They bought their 1960's home when they moved to Ephrata as newly-weds. Over the years they've worked to make improvements and upgrades on the house, mostly by hiring people, and they are thrilled with how much it's improved.

On most Saturdays in spring and summer Jennifer and Lucas can be found at the Ephrata Farmers Market, where they sell lavender and other flora from their garden and her home-grown goods are a big hit. While at the market Diane and Lucas take turns manning the booth so the other can look around. There are always booths there that appear to be associated with her utility company, talking about energy conservation or handing out energy efficient light bulbs. She didn't know her utility had so many rebate programs, and while she guesses having all of these programs is important, really she would like her power company to focus on keeping costs low. Diane thinks more people should try to conserve energy themselves and not wait for some community program or their utility company to encourage them.

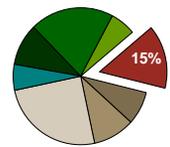
Diane did pick up a few CFL bulbs one day and some information on energy conservation and that spurred her to start weighing the costs and benefits of conserving energy. She feels very strongly about finding ways to control her family's energy costs but she also believes that it's socially responsible to limit their use of electricity, provided it isn't TOO much of a hassle. When it comes to finding conservation activities that they can comfortably adopt and maintain, the only success has been recycling. Under Diane's direction, Lucas takes care of all the recycling for their family; he separates the plastics, cans and cardboard and makes sure the bin gets to the curb for the recycling truck.

When it comes to larger conservation projects, Mitch has been looking at replacing the windows in their home and having the furnace tuned-up. A few years back Mitch had the insulation in their attic upgraded, and they did notice some savings on their energy bill as a result.

Aside from those activities and considerations, Diane and Mitch aren't investing a lot of time or resources in controlling their energy usage. And when it comes to investing anything in conservation they feel they can mostly handle it on their own. They get a lot of pamphlets from the utility company, encouraging them to submit 'rebates' for energy efficient appliances and participate in new conservation programs. Diane and Mitch expect the utility company to provide energy at low costs, not devote so much time and resources trying to encourage customers to participate in energy programs.



% of Population (E/C.WA, E.OR, CA Region)

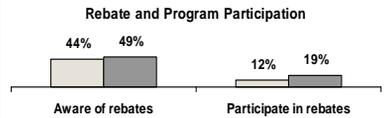
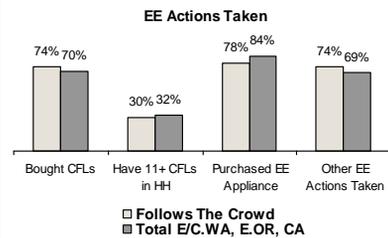


Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
<ul style="list-style-type: none"> Recycling paper, cans, bottles and plastics Installing additional or upgraded insulation or windows 	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> Converting electric/oil heating to natural gas Replacing major appliances w/energy efficient ones Replacing regular light bulbs and fixtures with EE ones Driving an electric/gas-electric hybrid vehicle 	
MOST likely to participate in (Q19)	
<ul style="list-style-type: none"> None 	
LEAST likely to participate in (Q19)	
<ul style="list-style-type: none"> Program that provides incentives for using CFLs Program with incentives to increase efficiency of existing heating/cooling systems Program with incentives to buy EE home electronics Program with incentives for purchasing highest efficiency heating/cooling system Home weatherization program Program for installing a home device that allows you to monitor electricity usage 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> Believe it's socially responsible to limit use of electricity It's very important to find ways to control your energy costs 	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> It's worth spending more to get the highest quality products Always purchase the most advanced products Regularly review your home's energy usage Very concerned about environmental effects of electric plants Prefer customizable products that meet exact needs Pay a lot of attention to energy-related issues because they affect my home and the country as a whole You constantly look for ways to save on energy costs It's very important that appliances save time/effort The most important thing about heating/AC is comfort It's worth spending more for an EE electric appliance/device 	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
<ul style="list-style-type: none"> Purchase price 	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> Discount stores 	<ul style="list-style-type: none"> Retail grocery stores
Key Attitudes about Shopping (Q25)	
<ul style="list-style-type: none"> Generally prefer to shop in-store rather than online 	

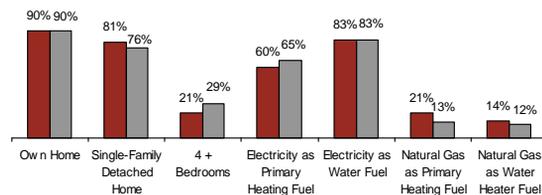


My Utility Company	
MOST Important Utility Company Functions (Q29)	
<ul style="list-style-type: none"> Keep costs as low as possible 	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> Provide more online options at the utility website Actively encourage customers to participate in energy/cost saving programs Operate in a completely environmentally-friendly manner Do everything possible to supply renewable, clean energy 	

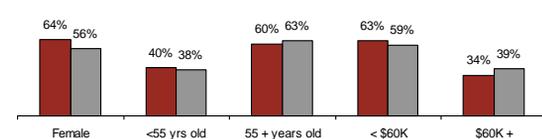


Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> Information included with your electric bill 	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> Information included with electric bill Other promotional mailing Newspaper advertisement 	
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> Farmers markets Rodeos or county fairs 	

Home Demographics



Respondent Demographics



Follows The Crowd Total E/C.WA, E.OR, CA

Segment Implications – Follows The Crowd



Marketing Effort

- ❑ The messages that will probably resonate best with Follows the Crowd are around cost savings and their utility working to keep costs as low as possible for its customers. While messages around social responsibility associated with reducing energy use and protecting the environment may work less well due to this segments lack of education on these issues, they should not turn off these customers.

Potential Load Impact

- ❑ Houses in this segment are slightly smaller than the total regional customer base and perceptions of electricity bills are about average, so their load impact is likely to be average.
- ❑ Despite the fact that potential end uses may be less than for some segments, this segment does contain a significant share of the regional customer base (15%)

Receptivity to Future Conservation Programs

- ❑ Potentially, new energy programs, particularly those involving rebates for appliances and CFLs, will be a tougher sell to this segment due to a lack of awareness of the need for such programs or the benefits to them personally.

Going Forward

- ❑ The fact that this segment is so positive about recycling, an issue that has certainly gotten more press than a lot of other types of conservation activities, suggests that this segment is not anti-conservation and with education they would also begin to “follow the crowd” in terms of energy efficiency as well.
- ❑ Like most segments, there is a lot of ground potentially to be gained in terms of greater participation in rebate and other conservation programs.
- ❑ While this segment is engaging in some energy efficiency behaviors, education about the importance of things like energy efficient appliances and other changes that can be made at home, their potential benefit to the home owner, as well as their impact on the environment, could positively impact this segment’s future choices.

Disengaged Consumers

Daniel, 63, and his wife Mary, 62, live near Chelan, WA, where Daniel is a real estate agent. They bought the three-bedroom home they live in 20 years ago, when their son Jeff was 11, and were able to find a good deal through Daniel's work connections. Jeff lives in Seattle now, working for Microsoft, and so they converted his room to a guest room.

Times have been tough recently, real estate sales are down and it's hard for Daniel to stay optimistic about his and Mary's future. While they don't have to tighten their belts, Daniel is looking at ways they can be proactive and cut back on some costs. One thing he would like to do is find a way to reduce their electricity bill, which was over \$100 last month! While he doesn't want to sacrifice the comfort of his home by monkeying with the thermostat, Daniel is open to looking at some less-dramatic adjustments.

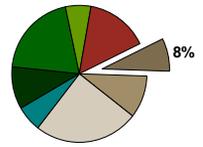
Two months ago, Daniel and Mary went into Chelan, to pick up some groceries that aren't available at their local farmer's market, when they came across a table outside, sponsored by their local utility. The representative at the table gave them a CFL light bulb and some energy efficiency program information to take home. Mary installed the light bulb and bought a few more, just to see if they would make a difference in the energy bill (nothing yet). The energy efficiency pamphlet got tossed, none of the programs stood out, but then a recent call from the utility reminded Daniel of one thing that had looked promising on the pamphlet, the suggestion of installing low-flow shower heads. He installed those last week and is waiting to see if they make a difference.

While they haven't been researching them much, Daniel and Mary are in the market for a new computer. They know, from their son Jeff, that their computer is nearing the end of its life and will need replaced so Daniel can use it for work, and for communicating more effectively with Jeff. Daniel doesn't usually care about appliances with added features or cutting-edge technology, but this once he is thinking of stepping out on a limb and buying an "energy efficient" computer, provided it doesn't cost an arm and a leg.

Aside from their recent considerations, Daniel and Mary aren't doing much else at home to save energy. Daniel says it's really been awhile since he's thought about how much energy their household consumes day-to-day. That's not to say he and Mary haven't had a few conversations about the state of the environment, perhaps sparked by an NPR story or something a friend said, but largely they just don't really pay attention. Though he doesn't hold much faith in either, Daniel believes his power company and the government should be the ones working to improve the environment and level of "green energy" supplied since they really are the experts.

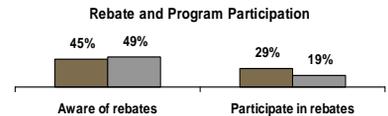
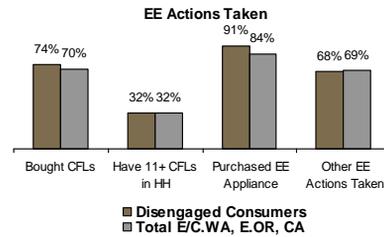


% of Population (E.C.WA, E.OR, CA Region)



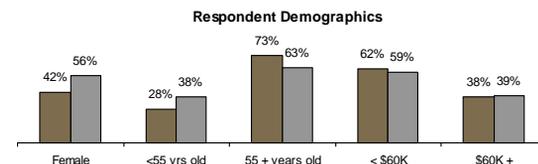
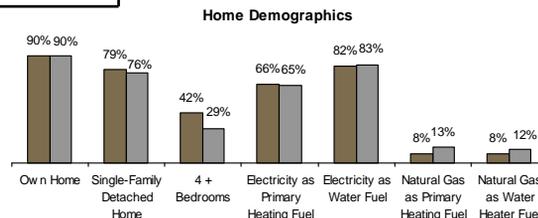
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> • Converting electric/oil heating to natural gas • Replacing light bulbs and fixtures with EE ones • Driving an electric or hybrid vehicle • Replacing major appliances with more EE ones • Installing additional/upgraded insulation or windows • Setting heating/cooling thermostats to use less energy • Recycling paper, cans, bottles and plastics • Using mass transit instead of driving 	
MOST likely to participate in (Q19)	
• None	
LEAST likely to participate in (Q19)	
<ul style="list-style-type: none"> • Program that provides incentives to purchase EE models of home electronics • Program with incentives to increase efficiency of existing heating/cooling systems • Program w/incentives to buy CFLs • Program w/incentives to buy highest efficiency heating/cooling system • Home weatherization program • Program for installing a home device that allows you to monitor electricity usage 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
• Believe it's socially responsible to limit use of electricity	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> • Always buy most advanced products/technologies • It's worth spending more for EE electric appliances/devices • It's worth spending more to get the highest quality products • It's very important that appliances save time/effort • You are very optimistic about your own future • Long term threat of global warming is real and potentially catastrophic • Prefer customizable products that meet exact needs 	

My Utility Company	
MOST Important Utility Company Functions (Q29)	
• None	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> • Provide more online options to conduct business at utility web site • Operate business in completely environmentally-friendly way • Actively encourage customers to participate in cost-saving programs • Do everything possible to supply clean, renewable energy 	



Communication	
BEST Way to Hear About EE Programs (Q22)	
• Information included with electric bill	
How Learned About EE Programs (Q18)	
• Information included with electric bill	
Local Events Attended in last 12 Months (Q28)	
<ul style="list-style-type: none"> • Farmers markets • Neighborhood or community events • Rodeos or county fairs 	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
• Purchase price	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> • Discount stores • Retail grocery stores 	
Key Attitudes about Shopping (Q25)	
• Someone in HH does a lot of do-it-yourself projects to save money	



■ Disengaged Consumers ■ Total E.C.WA, E.OR, CA

Segment Implications – Disengaged Consumers



Marketing Effort

- ❑ Disengaged Consumers may be difficult to capture, as energy costs and the impact of energy consumption on the environment are not a high priority for them, though messages around cost savings will likely have the most impact.

Potential Load Impact

- ❑ Houses in this segment are larger than some and perceived electricity usage is somewhat higher, though gas penetration is somewhat lower.
- ❑ At 8% of the regional customer base, this segment represents a small portion of the total.

Penetration

- ❑ The new energy programs tested higher among this segment than the other “browns” but still tested fairly low. Despite their relative lack of environmental concern, Disengaged Consumers have a history in engaging in energy efficiency behaviors, particularly CFL usage and appliance rebate programs, that suggests some potential for future participation, though further education is needed.

Going Forward

- ❑ Although energy consumption and the environment are not this segment’s priorities, the fact that they already participate in some conservation activities could potentially make it easier to further encourage this behavior than it might otherwise. However, some education of this segment would still be required to significantly change attitudes or behavior, and some tools to help customers identify the fruits of their labor might be helpful.
- ❑ Their lower satisfaction with their local utility will also make it more difficult for the utility to market to these customers.
- ❑ At least initially, money may be better spent targeting other segments that represent lower hanging fruit. Long term, however, this segment does have potential for increasing overall energy conservation, given its overall load impact.

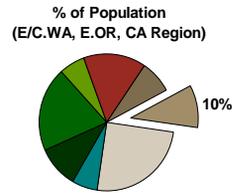
Comfort Is King

Robert, age 45, and his wife Carrie, 42, live in Franklin County, WA, near West Pasco, where Robert works as an architect. Robert's been with his firm nearly 22 years – almost since its inception – and has capitalized on the rapid increase of new money and commerce that has flocked to West Pasco from the remaining Tri-Cities. Carrie is a stay-at-home mom, with their two sons, Sam and John, and their daughter Jaime, and they have lived in the same five-bedroom house they bought just before the oldest, Sam, was born 17 years ago. They had originally planned on having more children, but the years passed and the extra bedroom was converted into a guest room. Over the years Robert has undertaken home improvement projects to increase the amenities in their home. He just finished a large deck in the back and is busy installing a hot tub (something he's planning as a surprise for Carrie).

Carrie and Robert believe their home should be comfortable and accommodating and are willing to pay what it takes for long showers and a warm house when they come home. Another thing they are willing to pay more for is feeling safe on the road, which is why Robert put a down payment on a Hummer for Carrie last year. Robert appreciates that if he leaves his wife and son for a few days they can drive the Hummer and feel safe on the road. He realizes the Hummer takes more gas but the added safety and cargo space are worth it.

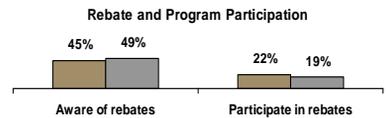
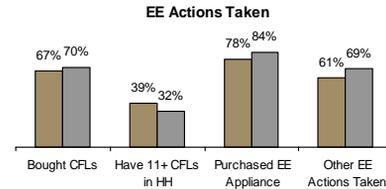
During a recent architectural conference in Seattle, Robert had a conversation in the lobby with a man who said he was replacing his home appliances with energy-efficient models to help with global warming and climate change. Robert kept his opinions to himself but thought little of the man's conviction. Robert doubts global warming is as big a problem as people are saying. He blames the media and people with hidden agendas for whipping the public into a frenzy, and he doesn't see how his family's actions can possibly have an impact (positive or negative) on such big environmental issues. They do their part to maintain the environment around them. They don't throw trash on the ground and Robert remembers they have made at least a couple trips to the recycling station, after they've had a lot of guests for the weekend. However, he thinks that trying to sort and recycle household waste on a daily basis would be too much of a hassle.

Sam recently brought home a CFL light bulb he saw in a store display and told his parents about the information he'd read on how CFLs and energy efficient appliances can save them money by reducing their energy usage. This inspired Carrie to buy a few more CFLs and upgrade their refrigerator to an energy efficient model. They have been using CFLs and this new refrigerator for a couple of months now, but Robert hasn't noticed any change on their utility bill. Aside from trying to influence his purchase decisions, Robert has noticed the utility trying to pressure him into participating in a bunch of new conservation programs by padding his utility bill with new information. Robert looked over the program descriptions and threw them away. He thought it was too inconvenient to bother submitting a rebate application for the refrigerator they bought, he can't fathom taking the time to install a device in his home for monitoring his electricity usage, especially since he doesn't see the value in it. In Robert's opinion, their utility spends a little too much time buying into the hype and worrying about being "green", and should concentrate instead on keeping the cost of power low.



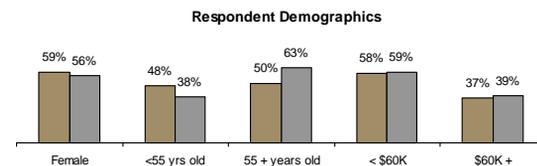
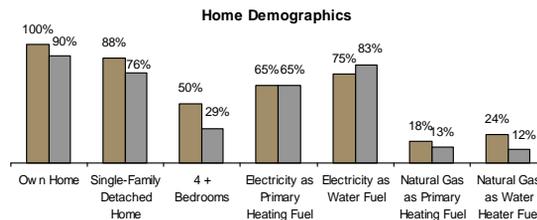
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
<ul style="list-style-type: none"> Recycling paper, cans, bottles, and plastics 	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> Using mass transit instead of driving Driving an electric or hybrid gas-electric vehicle Converting electric/oil heating to natural gas Replacing light bulbs and fixtures with EE ones Setting heating/cooling thermostats to use less energy Replacing major appliances with more EE ones Installing additional/upgraded insulation or windows 	
MOST likely to participate in (Q19)	
<ul style="list-style-type: none"> None 	
LEAST likely to participate in (Q19)	
<ul style="list-style-type: none"> Program to install a home device that allows you to monitor electricity usage Program w/incentives to buy EE home electronics Program w/incentives to buy highest EE heating/cooling system Home weatherization program Program w/incentives to buy CFLs Program w/incentives to help increase efficiency of existing heating/cooling system 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> You are very optimistic about your own future 	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> Always buy most advanced products/technologies Long term threat of global warming/climate change is real and potentially catastrophic Very concerned about environmental effects of electric plants It's worth spending more for an EE electric appliance/device It's worth spending more to get the highest quality products You constantly look for ways to save on energy costs Prefer customizable products that meet exact needs It's very important that appliances save time/effort 	

My Utility Company	
MOST Important Utility Company Functions (Q29)	
<ul style="list-style-type: none"> None 	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> Operate business in completely environmentally-friendly way Provide more online options at utility website Actively encourage customers to participate in energy/cost-saving programs Do everything possible to supply clean, renewable energy 	



Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> Information included with electric bill 	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> Some "other" method Other promotional mailing 	
Local Events Attended in last 12 Months (Q28)	
<ul style="list-style-type: none"> Farmers markets Neighborhood or community events 	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
<ul style="list-style-type: none"> Purchase price 	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> Discount stores Retail grocery stores 	
Key Attitudes about Shopping (Q25)	
<ul style="list-style-type: none"> Someone in HH does a lot of do-it-yourself projects to save money Generally prefer to shop in-store rather than online 	



Segment Implications – Comfort is King



Marketing Effort

- This Comfort is King segment may be difficult to capture as they are generally unconcerned with energy costs or the impact of energy consumption on the environment.

Potential Load Impact

- Homes are larger than most, and natural gas penetration is relatively high. However, perceived electricity usage is among the lowest, and, at 10%, it is a relatively small segment.
- Customers in this segment also potentially have greater financial means than some to make energy efficient improvements to their homes, assuming they saw the value of it.

Receptivity to Future Conservation Programs

- The new energy programs tested low, particularly installing a home device for monitoring electricity usage. Active energy conservation is not on this segment's list of priorities, possibly not even on their radar, and most that have participated didn't notice any savings as a result. Tying these issues to cost savings would be the best way to get their attention.

Going Forward

- While education is clearly needed in this segment, it is unclear if education alone will engage these consumers and make them more interested in conserving.
- Their somewhat lower satisfaction with their local utility will also make it more difficult for the utility to market to these customers.
- At least initially, money may be better spent targeting other segments that represent lower hanging fruit. Long term, however, this segment does have potential for increasing overall energy conservation, given its overall load impact and history of, at least some, energy efficiency behaviors.

No Interest, No Action

Brian, 56, and his wife Shayna, 54, rent a two bedroom home near Philomath, Oregon, not far from their son Jeff, 30, who teaches Environmental Science at OSU. Brian delivers mail for UPS and Shayna is a veterinary tech at a local animal hospital. Both have worked hard all of their lives, to provide for Jeff and save for retirement. Even though costs have risen over the years, Brian and Shayna have managed to make adjustments and still maintain a comfortable home.

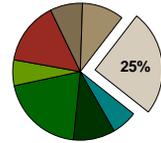
Given the challenges of accomplishing this on a limited budget, Shayna has been very frustrated lately with Jeff pressuring them to "live green" and help save the environment, particularly when the changes Jeff suggests they make would cost money. She knows that Jeff has a different perspective on the environment, given his chosen career and lifestyle habits, but she's not convinced that the environmental dangers are real. For Christmas last year, Jeff gave them a new TV, which he pointed out was an "energy-efficient" replacement for their old model, that would save them money *and* help the environment. Although it was a nice thought, Shayna wondered why he would spend the money on something they didn't need replaced, and spend extra money for the additional "Energy Star" feature. They haven't bought any appliances in a while but if they did, price would be way more important than any environmental benefit. Jeff had tried to point out that the savings *would* come, in the form of a lower energy bill, but Shayna wasn't convinced. Besides, if the only way to tell if a new appliance was saving them money, or had just cost too much, was to look at the energy bill, she wouldn't be interested. Aside from glancing at the bill before she pays it, Shayna doesn't like to monitor their home energy usage too much.

Shayna knows that Jeff means well and it isn't as if she and Brian are against the environment, they just don't think that global warming is the threat people say it is and they don't think it's their social responsibility to limit their use of electricity. They do recycle, when they can, and they feel that they are doing their part. They don't feel it's necessary to replace all their appliances or their light bulbs, or anything else, just to conserve electricity or get a "rebate" from the utility company.

Shayna has seen ads in the newspaper advertising "Energy Star" appliances and the rebates you can get from the utility company when you buy them. She also remembers seeing something about rebate and other conservation programs from a special utility pamphlet stuffed in their mailbox. Even though she's not interested in the programs, Shayna will say that the utility company makes it easy to get information on energy efficiency, kind of like Jeff. It's not important to Shayna, that the utility work so hard to get customers to participate in these kinds of programs. If the utility is going to do anything for the environment she would rather it just focus on supplying renewable, clean energy, but only if it can keep her costs low at the same time.

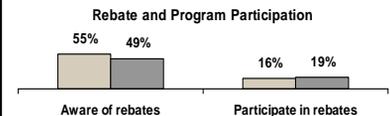
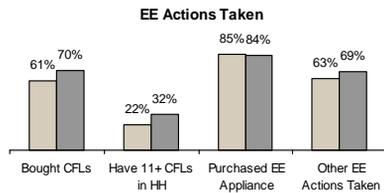


% of Population (E/C.WA, E.OR, CA Region)



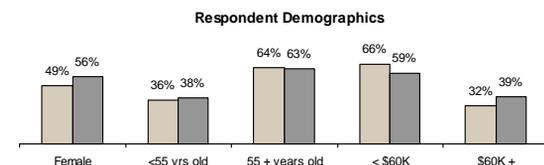
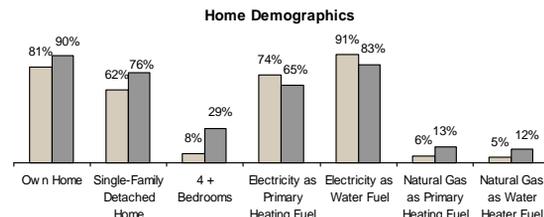
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> • Converting electric/oil heating to natural gas • Replacing light bulbs/fixtures with EE ones • Replacing major appliances with EE ones • Driving an electric/hybrid vehicle • Using mass transit instead of driving • Installing additional/upgraded insulation or windows • Setting heating/cooling thermostats to use less energy 	
MOST likely to participate in (Q19)	
• None	
LEAST likely to participate in	
<ul style="list-style-type: none"> • Program w/incentives to buy EE home electronics • Program w/incentives to buy highest EE heating/cooling system • Program w/incentives to increase efficiency of existing heating/cooling system • Home weatherization program • Program to install home device that allows you to monitor electricity usage • Program w/incentives to buy CFLs 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
• None	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> • Always buy the most advanced products/technologies • Long term threat from global warming/climate change is real and potentially catastrophic • Prefer customizable products that meet exact needs • Very concerned about environmental effects of electric plants • Regularly review your home's energy usage • It's worth spending more for EE electric appliance/device • Believe it is socially responsible to limit electricity usage • You constantly look for ways to save on energy costs • Pay a lot of attention to energy-related issues because they affect both your home and country as a whole • It's very important that appliances save time/effort 	

My Utility Company	
MOST Important Utility Company Functions (Q29)	
• Keep costs as low as possible	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> • Provide more online options at utility website • Actively encourage customers to participate in energy/cost-saving programs • Operate business in completely environmentally-friendly way • Do everything possible to supply clean, renewable energy 	



Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> • Some "other" method • Information included with electric bill 	
How Learned About EE Programs (Q18)	
• Information included with electric bill	
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> • Farmers markets • Neighborhood or community events 	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
• Purchase price	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> • Discount stores • Retail grocery stores 	
Key Attitudes about Shopping (Q25)	
• Someone in HH does a lot of do-it-yourself projects to save money	



□ No Interest, No Action ■ Total E/C. WA, E.OR, CA

Segment Implications – No Interest, No Action



Marketing Effort

- ❑ The No Interest, No Action segment may be difficult to capture as they are generally unconcerned with energy costs or the impact of energy consumption on the environment. Additionally, a fair bit of education would be required on how energy saving programs can help them and the environment, though it's unclear whether such education would change attitudes or behaviors.

Potential Load Impact

- ❑ Given the size of the homes the potential savings to be gained from this segment may be a lot less than other segments. The greater preponderance of apartments in this segment and lower incomes also limits to a certain degree what these customers might be able to do in terms of energy efficiency.
- ❑ Despite this, No Interest, No Action is the largest regional customer segment, making it potentially interesting simply because of its size.

Receptivity to Future Conservation Programs

- ❑ Active energy conservation is not on this segment's list of priorities, possibly not even on their radar. Even tying these issues to cost savings may not get their attention as they are much less concerned / have less desire to watch energy costs.

Going Forward

- ❑ At least initially, money may be better spent targeting other segments that represent lower hanging fruit.
- ❑ Their somewhat lower satisfaction with their local utility will also make it more difficult for the utility to market to these customers.
- ❑ This segment's sheer size, however, may make them a target for conservation efforts longer term.

Eco Rejecters

Craig, 56 years old, and his wife Maureen, age 55, live in the hills outside of Corvallis, OR. They moved out of Corvallis proper because they found a 3,400 ft, 3-bedroom home that was much bigger and nicer than their previous.

Maureen stays home to care for their children Jack, 15 and Jessica, 9, while Craig works as a software engineer at HP. Maureen was very happy with Craig's decision to move them and she has already settled in comfortably. The less-urban setting provides more privacy and peace and quiet, as well as a huge yard for the kids to play in.

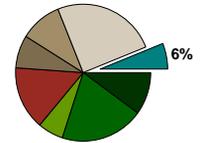
Their new house is bigger, which also means higher energy bills. Craig noticed the difference while comparing their energy usage bills between properties. Craig likes to keep an eye on all the bills, to make sure there aren't any mistakes, but he isn't worried about the increase. A comfortable home and family are always the top priorities on his list, even when they take long showers and leave the heater running all night. As long as he can afford it, Craig doesn't see a need to change the way they consume resources. He knows plenty of people would disagree, and say that global warming is a growing threat and that conserving energy is the socially responsible thing to do, he reads about it on the news websites and on all the loose papers stuffed in his utility bill.

Lately, Craig has gotten a little tired of hearing about environmental issues and feeling pressured to alter his lifestyle and "live green". When he looks around he doesn't see the environmental danger everyone is talking about. The temperature still drops plenty low in the winter, which is why he spends so much on heating to keep things toasty, and he lives a short drive from McDonald forest where he takes walks with his family. He realizes that humans do have an impact on the environment around them, but they always have. Over time people have made adjustments as needed but he doesn't see a current need to do that. Sometimes he feels like the world has gone nuts. When he goes to the OSU basketball games, the parking lot is littered with hybrid cars. When he stops by the hardware store or home improvement store he sees endless displays with CFLs and 'low-flow' showerheads.

Craig did end up buying an "Energy Star" big screen TV a month back, but it was due to a stellar review he read of that model on a tech blog, not because it was 'energy efficient'. Craig doesn't pay attention to the environmental impact of his purchases, because he doesn't believe they have an impact. Of course the salesperson at the store made a big deal of his "green" decision and encouraged him to submit a rebate application to the utility company. Craig was polite but rolled his eyes as he left. Craig did read something in a utility bill about appliance rebates but he isn't going to participate. He doesn't want his utility to try and encourage customers to conserve energy or worry about being environmentally-friendly itself. He wants the energy to be there when he flips the switch and the costs to be as low as possible.

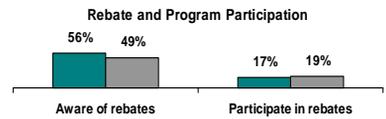
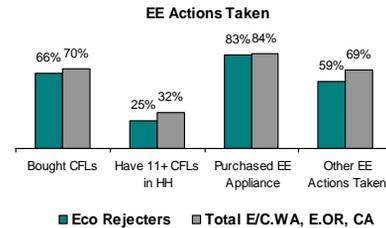


% of Population (E/C.WA, E.OR, CA Region)



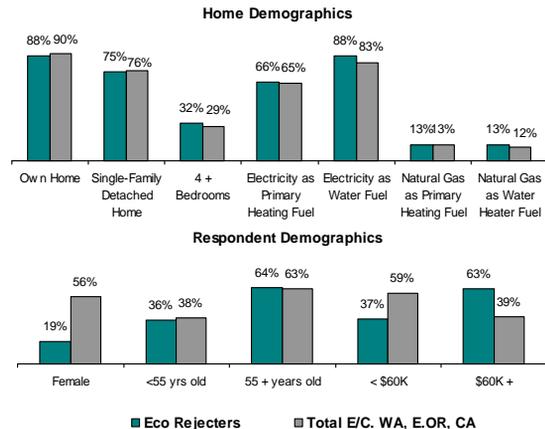
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> • Driving an electric/hybrid vehicle • Using mass transit instead of driving • Replacing major appliances with EE ones • Replacing regular light bulbs/fixtures with EE ones • Setting heating/cooling thermostats to use less energy • Installing additional or upgraded insulation/windows • Recycling paper, cans, bottles and plastics • Converting electric or fuel oil heating to natural gas 	
MOST likely to participate in (Q19)	
• None	
LEAST likely to participate in	
<ul style="list-style-type: none"> • Program w/incentives to buy CFLs • Program w/incentives to help increase efficiency of existing heating/cooling system and ductwork • Home weatherization program • Program w/incentives to buy EE home electronics • Program w/incentives to buy highest EE heating/cooling system • Program for installing a home device to monitor energy usage 	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> • You are very optimistic about your own future • The most important thing about heating/AC is comfort 	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> • Long term threat of global warming/climate change is real and potentially catastrophic • Very concerned about environmental effects of electricity plants • It's worth spending more for EE appliance/device • Believe it is socially responsible to limit electricity usage • Prefer customizable products that meet exact needs • Constantly look for ways to save on energy costs • Pay a lot of attention to energy-related issues because they affect home/country 	

My Utility Company	
MOST Important Utility Company Functions (Q29)	
• Keep costs as low as possible	
LEAST Important Utility Company Functions	
<ul style="list-style-type: none"> • Operate its business in a completely environmentally friendly manner • Actively encourage customers to participate in energy/cost-saving programs • Do everything possible to supply clean, renewable energy • Provide more online options at utility website 	



Communication	
BEST Way to Hear About EE Programs (Q22)	
• Information included with electric bill	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> • Television advertising • Newspaper advertisement 	<ul style="list-style-type: none"> • Salesperson at a store • Other promotional mailing
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> • Rodeos or county fairs • Farmers markets 	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
• None	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> • Home improvement stores • Local hardware stores • Discount stores 	
Key Attitudes about Shopping (Q25)	
• Environmental impact of day-to-day purchases is not something you worry about all the time	



Segment Implications – Eco Rejecters



Marketing Effort

- Eco Rejecters will be very difficult to reach due to their negative perception of their responsibility in environmental issues and relative lack of concern with cost issues.
- Impressions of their local utility are also among the lowest, making messages that come through the utility potentially dismissed.

Potential Load Impact

- Although there may be some impact on load from this segment given the relatively large homes, high energy usage and significantly higher incomes, the unwillingness of Eco Rejecters to recognize a need will make this a difficult challenge.
- Fortunately, this segment represents only a small portion of the total regional customer base at 6%.

Receptivity to Future Conservation Programs

- Interest in the energy conservation programs tested was lower than for any other segment.

Going Forward

- Messages around global warming and the environmental impact of energy choices may serve to turn off this segment.
- Given the size of this segment and its apparent rejection of environmental issues as something to be concerned about, money is probably better spent targeting other segments that represent lower hanging fruit.