

**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**



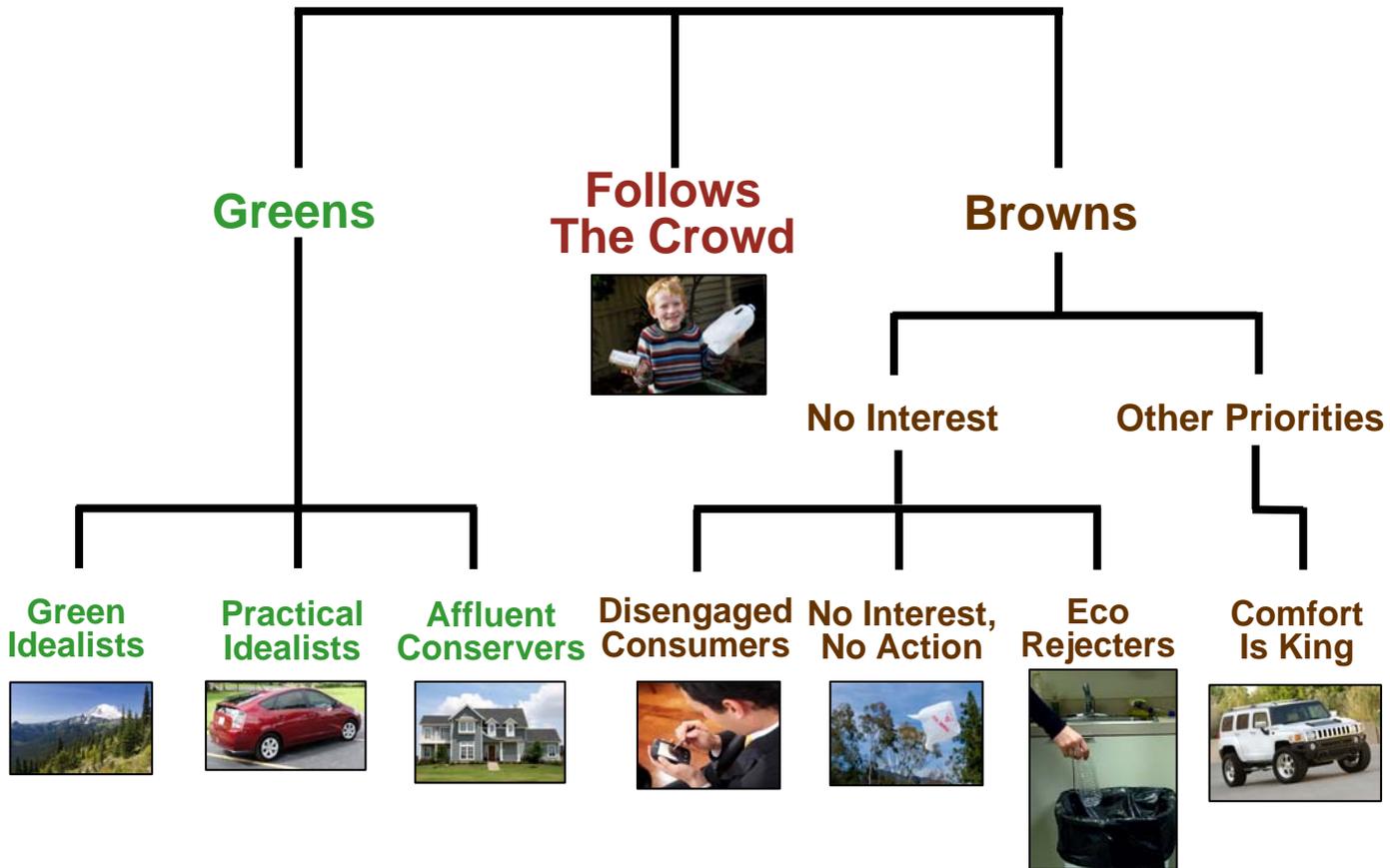
# **Residential Segmentation Research**

## **Personalizations**

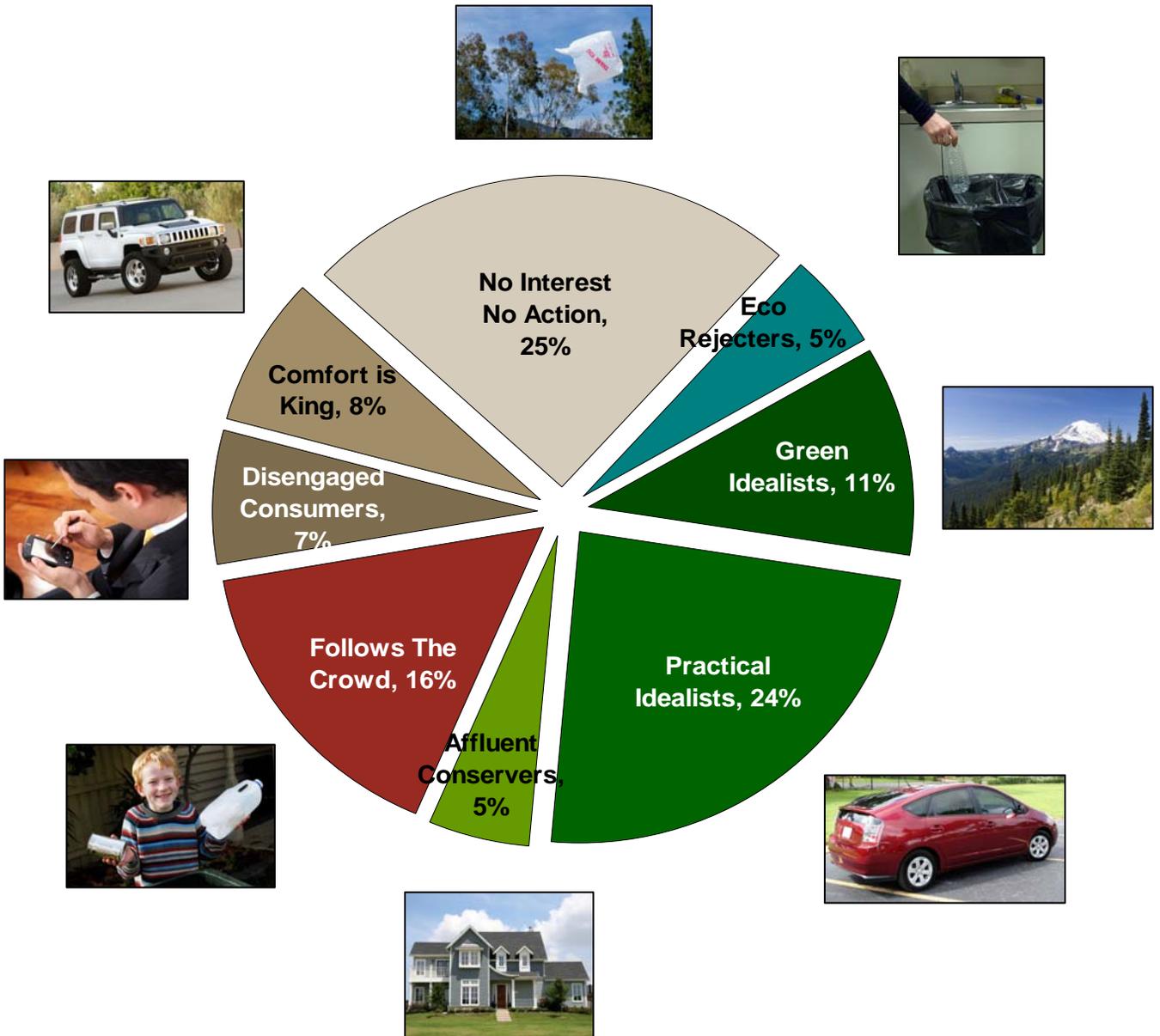
**Western WA Region**

March 2009

# BPA Segment Summary



# Summary of Segment Sizes



# BPA Customer Segments – The “Greens”

## Green Idealists, 11%

- ❑ 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, but slightly below Practical Idealists; great deal of interest in “new programs” tested in the survey
- ❑ Majority are women; lowest income; smaller homes than most; largest proportion of renters (tied with the No Interest, No Action segment)



## Practical Idealists, 24%

- ❑ 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
- ❑ Highest level of conservation activities - *Slightly* greater use of CFLs, energy efficient appliance purchase & engaging in “other” energy efficiency activities at home (i.e. upgrading insulation) than Green Idealists; participation in rebate programs *slightly* below Green Idealists
- ❑ “Green” utility is very important; impressions of their local utility significantly below Green Idealists, though in the satisfactory range
- ❑ Interest in new programs strong, but much lower than for Green Idealists
- ❑ Larger proportion of home owners (98%) than the Green Idealists; homes are larger than most segments



## Affluent Conservers, 5%

- ❑ One of most affluent; all are home owners; 2<sup>nd</sup> largest homes on average (all with 3+ bedrooms)
- ❑ Perceptions of electric and 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
- ❑ While greatest importance placed on recycling, a comparatively high number of CFLs installed, energy efficient appliance purchases, rebate program participation and “other” energy efficiency measures taken (i.e. upgrading insulation); greater energy efficient appliance rebate program participation than for either Practical or Green Idealists
- ❑ 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, 16%

- ❑ “Average” BPA (non-Puget Sound area) customer demographically – slightly more women responders, 55+ years old, most living in single-family detached homes, and incomes of about \$56K
- ❑ 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
- ❑ Participate in some conservation activities – less so than the most active “green” segments, but more so than some of the “brown” segments
- ❑ Do purchase CFLs and energy efficient appliances as well as make some “other” energy efficiency changes (i.e. installing upgraded insulation); potential cost savings more important than the environment
- ❑ “Green” utility is much less important than for the green segments
- ❑ Some of the lowest opinions of their local utility, particularly in terms of providing reliable and green power, providing good customer service, caring about their customers and being trustworthy.



# BPA Customer Segments – The “Browns”

## Disengaged Consumers, 7%

- ❑ Neither controlling energy costs nor concerns with the environment drive this segments' thinking or behaviors
- ❑ Unengaged when making energy product purchase decisions
- ❑ Less likely than most “Browns” to see connection between energy conservation activities & protecting the environment
- ❑ Actual conservation activities, however, similar to the “average” (non-Puget Sound area) customer, doing more than most “Browns” but less than most “Greens”; relatively few bought any appliances in the past 12 months, but a significant proportion still managed to buy energy efficient models; some also purchase CFLs or do things like upgrade their windows
- ❑ “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” (non-Puget Sound area) customer; most own single-family homes with 3 or less bedrooms, have incomes of about \$66K, and perceive their electricity bills to be about \$100 a month in the summer.



## No Interest, No Action, 25%

- ❑ 2<sup>nd</sup> 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 the 2<sup>nd</sup> lowest of any segment; energy efficient appliances are not worth paying more for; very unengaged purchasers
- ❑ 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”; impressions of their local utility are low, though better than some brown segments – particularly the Disengaged Consumers and 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 similar to other segments, despite smaller residences



## Eco Rejecters, 5%

- ❑ 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
- ❑ Least likely to use CFLs or to have purchased an energy efficient appliance in the last 12 months; no rebate program participation
- ❑ 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, though impressions of the utility providing fair and reasonable rates is higher than for other brown segments
- ❑ Majority are men; most own average sized homes (3 bedrooms or less); about average incomes; and about average energy use



# BPA Customer Segments – The “Browns”

## Comfort is King, 8%

- ❑ All are home owners; largest homes with most having 4+ bedrooms; above average energy use; more affluent than most
- ❑ One of least concerned / aware in terms of conserving, energy costs, and protecting the environment
- ❑ 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
- ❑ Do participate in conservation activities at a rate similar to the average BPA (non-Puget Sound area) customer particularly in terms of energy efficient appliance purchase, CFL use and participation in “other” energy efficiency activities (i.e. upgrading insulation); cost savings primary motivator
- ❑ A utility that keeps costs as low as possible is paramount; satisfaction with local utility is lower than most segments



# Green Idealists

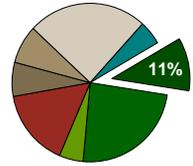
Jenn is 55 years old and lives in Ashford and works for Mt. Rainier National Park. She and her husband Paul and their son Jason, 15, rent a three-bedroom, manufactured home surrounded by evergreens. Jenn loves her "dirt road commute" to the Paradise Visitor Center, where she and Paul both work. Jenn loves living in the Pacific Northwest and is especially proud of the region's environmental bent. Jenn took some classes on forest systems at the local community college and considers herself something of an environmentalist. She's proud to incorporate those ideals into her everyday life.

Jenn and her husband both love their jobs and wouldn't want to work anywhere else, but the economy is tight and they have to get creative sometimes to make the dollars stretch. Whenever she can, Jenn monitors their energy usage and tries to find ways to control their energy costs. By lowering their energy use, they save money and help the environment, two things that are very important to both of them. Jenn and Paul recognize that there are a lot of things they can do around the house that will reduce their energy use and protect the environment, and they make these activities part of their daily routine. They are avid recyclers, they turn off the lights and adjust the thermostat whenever possible. Last year after a lot of saving they were also able to convert to a natural gas furnace to heat their home. These changes have really paid off and resulted in a lower electric bill. To decrease it even further, Jenn is looking at the possibility of converting their hot water heater to natural gas as well. When they are able to afford it (and as their ancient appliances wear down further) Jenn and Paul plan to replace some of their major appliances with more energy efficient ones and install low-flow shower heads. Before buying, Jenn plans to research their options very carefully and visit quite a few stores, to see if she can find an appliance with all the features she wants AND find it on sale! And she hopes when she does buy an appliance, that her utility will still have a rebate program available for her to participate in and save even more.

Jenn is very pleased that she has a utility company that is doing everything it can to supply renewable, clean energy and provide customers with programs to help them reduce home energy use. While she is thrilled about all the new programs the utility is piloting, especially the incentive program for CFLs (something she is curious about), Jenn hopes the utility will still focus on keeping costs as low as possible, so she can continue saving for that new hot water heater!

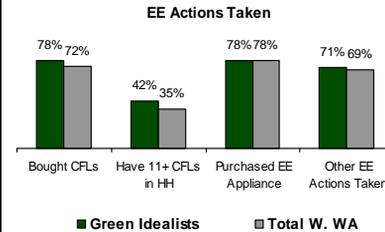


% of Population (W.WA Region)

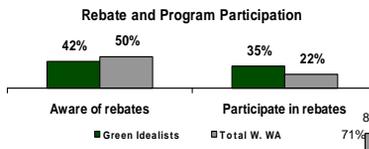


Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
<ul style="list-style-type: none"> <li>Recycling paper, cans, bottles and plastics</li> <li>Installing additional or upgraded insulation or windows</li> <li>Setting heating or cooling thermostats to use less energy</li> 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

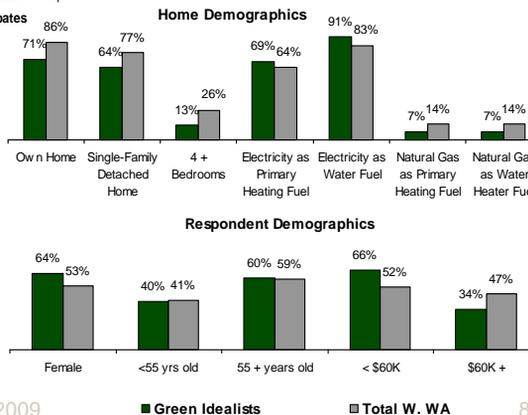
My Utility Company	
MOST Important Utility Company Functions (Q29)	
<ul style="list-style-type: none"> <li>Do everything possible to supply renewable, clean energy</li> <li>Actively encourage customers to participate in energy and cost savings programs</li> <li>Operate business completely environmentally-friendly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



Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
<ul style="list-style-type: none"> <li>Cost savings from reduced electricity usage</li> <li>Discounts for buying an EE appliance</li> <li>Positive impact on environment from less energy</li> <li>Purchase price</li> <li>Features / functions included with product</li> </ul>	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> <li>Discount stores</li> <li>Retail grocery stores</li> </ul>	
Key Attitudes about Shopping (Q25)	
<ul style="list-style-type: none"> <li>Generally prefer to shop and make purchases in-store rather than online</li> <li>Don't usually like to buy things unless they're on sale, or you have a coupon/discount</li> <li>Carefully research product specifications, features and reviews</li> </ul>	



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



# 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.
- Given the combination of high environmental concern and interest, and significantly lower incomes, striking a balance where both are addressed will be key for this segment.
- With Green Idealists, satisfaction with their utility is high, making them likely to trust their utility as a reliable source for energy conservation suggestions.

## Potential Load Impact

- The size of this segment's homes, which are much smaller than most, and the high proportion of those renting and / or living in mobile or manufactured homes will serve to limit the potential impact on load this segment can have. Additionally, the overall size of this segment (10%), which is smaller than some, will also serve to limit load impact.
- That said, there is a great deal of interest in natural gas conversion in particular, as well as other conservation programs more generally. This segment is also 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 a good deal of potential ground to be gained in terms of greater participation in rebate programs and CFL use.
- 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, 54 and her husband Paul, 55, live in Aberdeen, having moved from Olympia a year ago. Their teenage daughter, 16-year-old Laurie, wasn't too excited about the move, but Susan and Paul had been waiting for years to finally have the home of their dreams and they found it in Aberdeen. Finally they have the space they've always wanted for their family in a much newer home than their previous one, having been built in the late 80's. They were also able to afford a few "extras" this time around in their 2,700 square foot home, with a large rec room for their daughter and their friends (complete with a new entertainment system) and a hot tub for mom and dad. A home with upgraded windows, doors, and insulation was a requirement as well to save on energy costs. The only sacrifice this home has presented, really, has been the extra commuting time for Susan and Paul as their jobs are both still closer to Olympia. To offset both the expense and the negative environmental impact of this extra driving they traded in their Volkswagen Passat for a Toyota Prius which Susan drives.

Having moved from a 1,700 square foot home to a 2,700 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 paid even more attention to the things they do in their home that use energy in order to keep costs down. One easy thing Susan decided to do was put in more CFLs than she used to, having read online how big of a difference they could make in a home's energy use. They are less attractive than other bulbs but the energy savings is important (and she's noticed a difference in their electric bill!).

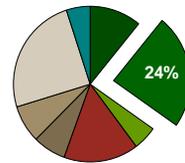
Susan also thought it was important to buy an energy efficient refrigerator for their home when they moved in. The cost was a little more but she tends to choose environmental benefit over cost savings when she can. There was a rebate offered for purchasing them, but she hasn't made time to fill out the forms and mail them in yet.

It is important to her that her utility do everything possible to supply renewable, "green" energy and operate in an environmentally-friendly way as well as encourage all customers to conserve energy where they can, even if it means a slightly higher cost for her.

She's heard of utilities installing a device that would allow you to see how much energy your household is using. That's something she thinks she could buy into; in her opinion that's a great example of what a utility should do – equip its customers with the tools and encouragement to use energy more efficiently. Extra incentives for purchasing CFLs would also be great, especially since they are so much more expensive than regular bulbs!

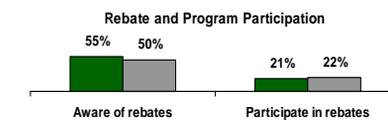
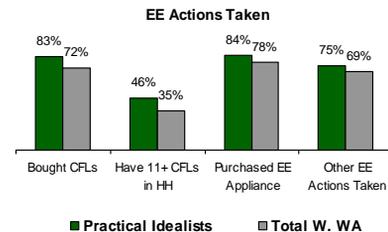


% of Population (W.WA Region)



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

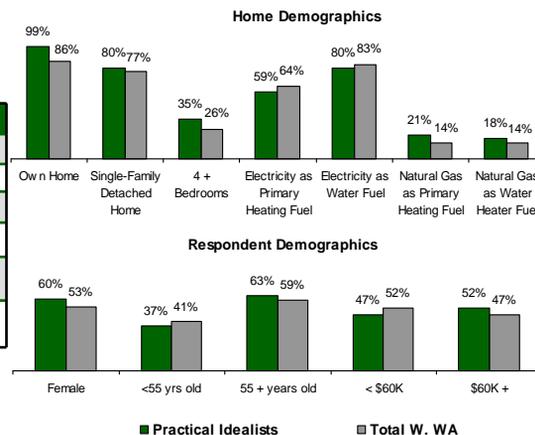
My Utility Company	
MOST Important Utility Company Functions (Q29)	
<ul style="list-style-type: none"> <li>Do everything possible to supply renewable, clean energy</li> <li>Actively encourage customers to participate in energy and cost savings programs</li> <li>Operate its business in a completely environmentally-friendly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



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



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



# 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.
- ❑ While opinions of their utility are somewhat lower than for the Green Idealists, they are still likely to trust their utility as a reliable source for energy conservation suggestions.

## Potential Load Impact

- ❑ Even though houses in this segment are larger than most, perceptions of electricity bills are lower than average. Still, this is the largest segment in the region, which suggests a significant number of behaviors or end uses that could be impacted.

## Penetration

- ❑ Relatively lower participation in rebate programs, particularly considering the majority of appliances purchased were energy efficient models indicating a need for something to help build greater participation.
- ❑ CFL use is higher than any other segment and there's a good deal of interest in participating in CFLs rebate programs.
- ❑ Also some interest in installing a device for monitoring electricity use though, overall, however interest in the "new" programs tested was lower than for the Green Idealists or Affluent Conservers.

## Going Forward

- ❑ This segment's size (24% of total) and 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.
- ❑ A focus on increasing participation in rebate programs is needed for this segment.

# Affluent Conservers

Linda, age 55, and her husband Jim, 57, live in Port Angeles, WA near the Peninsula College campus. Linda likes her job as head librarian at the college and her husband, Jim, is a patent lawyer.

Linda and Jim built their three-bedroom, 3,200 square foot home about 20 years ago and they still love it. They built it with the idea that they would have children – but between their busy careers and their penchant for traveling, that goal was replaced by others.

Even though energy costs can be high with a 3-bedroom home, and all the entertaining they do on the weekends, Linda doesn't do a whole lot to review and monitor their energy costs. She does think it's important to find ways to control energy costs, but she doesn't have time to regularly review her home's energy usage. She tries to make a dent in energy costs in more indirect ways. She did hire a technician to tune their heat pump, so that it would work more efficiently and she is looking into hiring someone to do a home energy audit. With her busy life, the more people she can hire, the less time she has to spend on energy conservation activities, but still decrease their energy costs, the better.

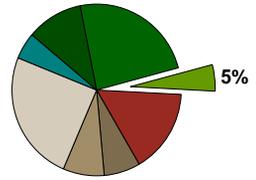
One way she has found to do that is through her appliance purchases. It seems like she is always buying new appliances and the new energy efficient models present an opportunity to save her money on monthly energy costs. She isn't always willing to spend more for an energy efficient appliance, but when she does she makes sure it's an appliance that is eligible for a rebate from the utility. By doing this, she is able to slice some of the cost off the appliance purchase, and it still lowers her monthly energy costs!

It seems like there is always some new energy efficiency program being advertised by the utility, either on their website or in her monthly bill. She thinks it's great that the utility is actively encouraging customers to lower their energy costs, and do what it can to supply renewable, clean energy.

Linda's not one of those environmental types that believes global warming is as much of a threat as people say. That said, she does appreciate that her utility is an environmentally responsible company and is coming up with all kinds of interesting new programs for her to consider, especially incentives for increasing the efficiency of her home's insulation. She has been thinking about hiring someone to come in and do that, and if she can get some incentives for it, that's even better!

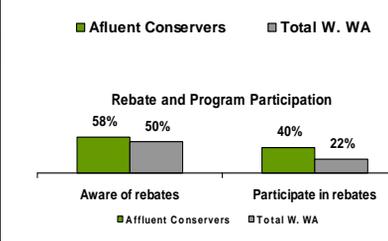
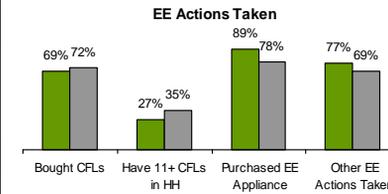


% of Population (W.WA Region)



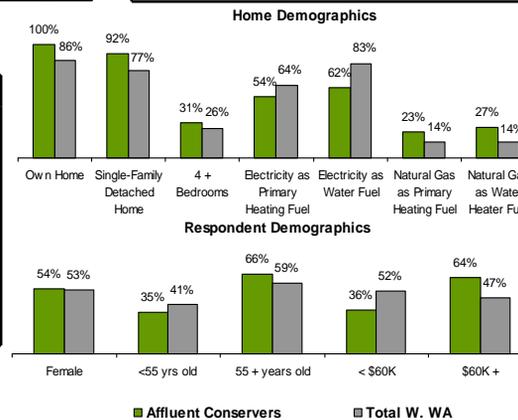
Energy-Use Actions and Attitudes
<b>Actions Perceived to Be MOST Impactful (Q23)</b>
<ul style="list-style-type: none"> <li>Recycling paper, cans, bottles and plastics</li> <li>Setting heating or cooling thermostats to use less energy</li> <li>Installing additional or upgraded insulation or windows</li>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

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



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

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



# 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. Despite their significantly higher incomes, this segment is very interested in lowering monthly energy expenses. Further education around EE appliances is needed, since the rate of EE purchase and rebate submission is very high for this segment, but agreement that EE appliances are worth spending more on is lower than many segments.

## Potential Load Impact

- ❑ Houses in this segment are much larger than most and electric bills are highest, despite a higher penetration of natural gas. Customers in this segment probably also have the financial means to make energy efficient improvements to their homes, assuming they saw the value of it. At only 5% 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, only slightly below Green Idealists and higher than Practical Idealists. The best potential program for this segment appears to be a home weatherization program.

## 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 EE activities, making them a potentially lucrative segment in terms of energy savings despite their smaller population size.
- ❑ Education focusing on the importance of CFLs and transportation choices is needed. Also, education around the cost saving ability of EE appliances might align this segment’s perceptions of the value of buying them more closely with their already high participation in EE purchases and rebate submissions.

# Follows The Crowd

Diane is 48 years old and lives in Kelso, WA where she has been a high-school teacher for 21 years. She and her husband Mitch and their son Lucas, 11, 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 1950's home when they moved to Kelso as newly-weds.

On most Saturdays in spring and summer Jennifer and Lucas can be found at the Kelso 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 each 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.

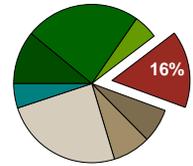
Diane did pick up a few CFL bulbs one day and some information on energy conservation and that spurred Diane to start talking more with her family about the concept of conserving energy, like turning off lights when no one is in the room. She doesn't have time to regularly review her home's energy usage but she thinks it's very important to control their energy costs, so this seemed like a good place to start. Lucas already understands that protecting the environment is important and under Diane's direction he takes care of all the recycling for their family; he separates the plastics, cans and cardboard and makes sure the bin gets to curb for the recycling truck.

In an effort to save money and control their energy use Diane and Mitch installed low-flow faucets in their two bathroom showers. They've also looked into buying an energy efficient clothes dryer, since their current model uses a LOT of energy running all the time, but their limited search turned up only really expensive models. If they buy an energy efficient model, they want to be sure that any money spent upfront will be made up in reduced energy costs later and they need more information to make this call.

Lucas was very insistent that they change all of their light bulbs to CFLs, so he and Mitch picked up a couple five-packs at the hardware store. She's proud of her son's initiative, though she has to admit she will only let him put them in the bedrooms and family room because they don't look very good or work well in her recessed lighting and other lamps and fixtures in the rest of the house.

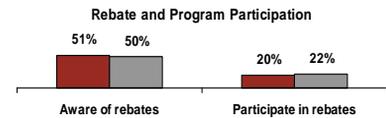
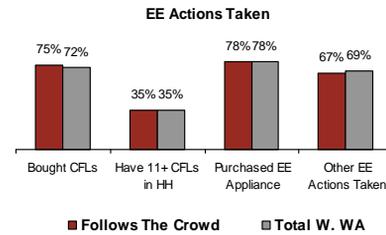


% of Population (W.WA Region)



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

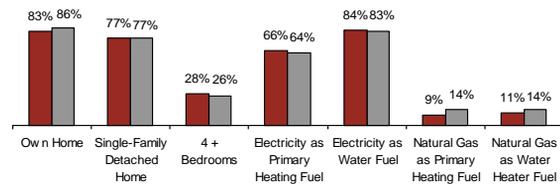
My Utility Company
<b>MOST Important Utility Company Functions (Q29)</b>
<ul style="list-style-type: none"> <li>None</li> </ul>
<b>LEAST Important Utility Company Functions</b>
<ul style="list-style-type: none"> <li>Provide more online options at the utility website</li> <li>Actively encourage customers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



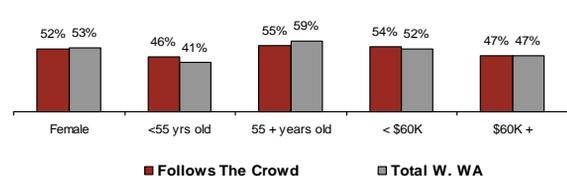
Communication
<b>BEST Way to Hear About EE Programs (Q22)</b>
<ul style="list-style-type: none"> <li>Information included with your electric bill</li> </ul>
<b>How Learned About EE Programs (Q18)</b>
Some "other" method
<b>Local Events Attended in Last 12 Months (Q28)</b>
<ul style="list-style-type: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

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

Home Demographics



Respondent Demographics



# 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 generally mid-range of the total Western Washington Regional customer base and perceptions of electricity bills are about average.
- ❑ Despite the fact that potential end uses may be less than for some segments, this segment does contain a fairly significant share of the customer base (16%)

## Receptivity to Future Conservation Programs

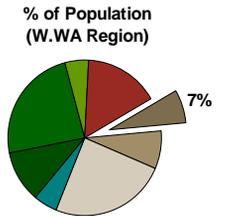
- ❑ Potentially, new energy programs will be a tougher sell to this segment due to a lack of awareness of the need for such programs or the benefits to them personally but also the low importance this segment places on their utility actively encouraging customers to participate in energy programs.

## Going Forward

- ❑ The fact that this segment is so “gung ho” about recycling, an issue that has certainly gotten more press than many other types of conservation activities, suggests that this segment is not anti-conservation and with education they could also begin to “follow the crowd” in terms of energy efficiency.
- ❑ Like most segments, there is potential ground 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 CFLs, energy efficient appliances and rebates, and other changes that can be made at home and 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, 55, and his wife Mary, 54, live in Centralia, WA, where Daniel is a real estate agent. They bought the three-bedroom home they live in over a decade ago and were able to find a good deal through Daniel's work connections. Three years ago they adopted the 8 year old son, James, of a friend who passed away, and now their home doesn't feel so empty.

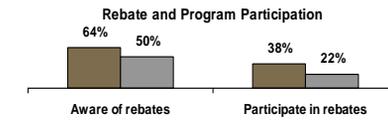
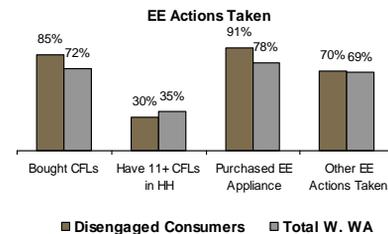


There are many things the couple love about living in Western Washington, with access to the mountains and beaches, as well as major league sports, all just a few hours away. Daniel and Mary recently bought season passes to the Seahawks, Daniel's favorite team and James loves to go too. Walking through the concessions area one weekend, James came across a booth from their local utility, handing out CFL light bulbs and plenty of literature. At James' insistence, they took home a CFL to try and Mary collected a few pieces of literature to read on the drive home. They'd heard about these new light bulbs and how great they are for the environment, but they admit they don't entirely understand how changing a few light bulbs would make much difference. Still, Mary is very concerned with finding ways to control their energy costs, so she went out and bought a couple more CFLs, putting them in the kitchen, where the light is on the most. On the drive home, Mary read the pamphlets and got the idea to participate in an energy efficient appliance rebate program. They had been looking to replace their refrigerator for a while and had been doing a lot of research into what model they wanted. Mary had noticed the "energy efficient" models and thought they were a little more expensive up front. However, if she could get some money back from her utility for buying one, AND reduce her monthly energy bill by using it, she would seriously consider making the purchase.

Saving money is the most important part of her household decisions, but if using less energy helps the environment too then Mary is glad. She certainly hears a lot about energy usage and environmental impact coming from the utility, but sometimes it seems like a bit much. Primarily, Mary wants the utility to focus on keeping her energy costs as low as possible. With all the time and money she sees the utility spend on developing and advertising new energy saving programs, Mary wonders if it is taking money out of her pocket or diverting it from more important things.

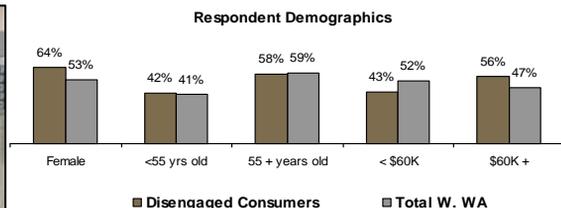
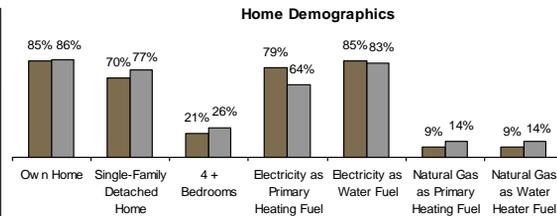
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>Replacing major appliances with more EE ones</li> <li>Converting electric/oil heating to natural gas</li> <li>Setting heating/cooling thermostats to use less energy</li> <li>Using mass transit instead of driving</li> <li>Replacing light bulbs and fixtures with EE ones</li> <li>Installing additional/upgraded insulation or windows</li> </ul>	
MOST likely to participate in (Q19)	
• None	
LEAST likely to participate in (Q19)	
<ul style="list-style-type: none"> <li>Program that provides incentives to purchase EE models of home electronics</li> <li>Program for installing a home device that allows you to monitor electricity usage</li> <li>Home weatherization program</li> <li>Program w/incentives to buy highest efficiency heating/cooling system</li> <li>Program w/incentives to buy CFLs</li> </ul>	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> <li>It's very important to find ways to control your energy costs</li> </ul>	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> <li>Always buy most advanced products/technologies</li> <li>It's worth spending more to get the highest quality</li> <li>It's worth spending more for EE electric appliances/devices</li> <li>The most important thing about heating/AC is comfort</li> <li>It's very important that appliances save time/effort</li> <li>Prefer customizable products that meet exact needs</li> <li>Want appliances that are simple to use</li> </ul>	

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"> <li>Provide more online options to conduct business at utility web site</li> <li>Actively encourage customers to participate in cost-saving programs</li> <li>Operate business in completely environmentally-friendly way</li> <li>Do everything possible to supply clean, renewable energy</li> </ul>	



Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> <li>Information included with electric bill</li> <li>Newspaper, radio, or television advertising</li> </ul>	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> <li>Newspaper advertisement</li> <li>Electric utility website</li> <li>Information included with electric bill</li> </ul>	
Local Events Attended in last 12 Months (Q28)	
<ul style="list-style-type: none"> <li>Farmers markets</li> <li>Neighborhood or community events</li> </ul>	

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"> <li>Discount stores</li> <li>Home improvement stores</li> </ul>	
Key Attitudes about Shopping (Q25)	
<ul style="list-style-type: none"> <li>Carefully research product specifications, features and reviews</li> </ul>	



# Segment Implications – Disengaged Consumers



## Marketing Effort

- ❑ Disengaged Consumers will probably be fairly difficult to market to, as the impact of energy consumption on the environment is not a high priority for them. Messaging around associated cost savings will likely have the most traction, given the importance (strongest among this segment's energy-use attitudes) of finding ways to control energy costs.

## Potential Load Impact

- ❑ Houses in this segment are moderate with most having 3 or fewer bedrooms. Electricity usage is on par with the total Western Washington Regional customer base, but natural gas is significantly lower.
- ❑ At 7% of the total regional customer base, this segment represents a fairly small portion of the total.

## Penetration

- ❑ Despite their relatively unengaged attitudes, this segment has the second highest participation in appliance rebate programs and is significantly more likely to purchase energy efficient appliances. CFL usage is higher than the regional customer base and a majority have noticed cost savings from energy efficiency activities. This indicates an opportunity to educate further and generate even greater participation.

## Going Forward

- ❑ Given more education about the benefits to the energy efficiency activities that they are already participating in, Disengaged Consumers may assign greater value to these activities, increase participation, and be more receptive to new ones that are introduced.
- ❑ However, their lower satisfaction with their local utility will also make it more difficult for the utility to market to these customers.

# Comfort Is King

Robert, age 55, and his wife Carrie, 54, live in Mint Valley, on the outskirts of Longview, WA, where Robert is an investment banker and Carrie is a stay-at-home mom. Robert's been with his company nearly 22 years – almost since its inception – and spends large amounts of time on international trips. They have three sons, Sam, Craig and John, and have lived in the same five-bedroom house they bought new just before the oldest, Craig, was born 17 years ago. 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.

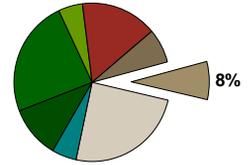
Carrie loves that their home was built with a large patio and hot tub and a stately kitchen with a high end Viking oven and range. Carrie and the kids also love to watch TV programs and movies together, especially on weeks when Robert is away. It's not uncommon in their home to have 4 TV's on at the same time in their bedrooms and in the family room, where the Robert's prized big screen is kept. Another prize possession is the family Hummer. Robert appreciates that when he leaves his wife and sons for a few days they can drive his Hummer and feel safe on the road. He realizes the Hummer takes more gas but the added safety and cargo space are worth it.

On a recent trip to Germany, Robert had a conversation on the plane 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, 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 got at school and told his parents about the rebate programs that some power companies offer for CFLs and energy efficient appliances. Robert decided to give the CFLs a shot and bought a few more, but using them didn't make any difference on the electricity bill. This scenario is familiar to Robert. A few months ago Robert installed low-flow shower heads to see if that would decrease their energy costs. It didn't, and, while reducing money shelled out to the electric company would be nice, Robert isn't going to lose any sleep over it. In his opinion, their utility spends a little too much time worrying about being "green", and should concentrate instead on keeping the cost of power low.

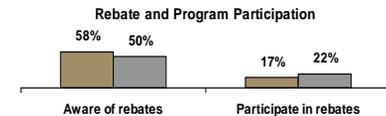
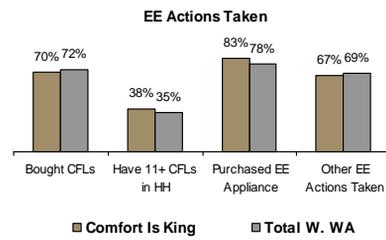


% of Population (W.WA Region)



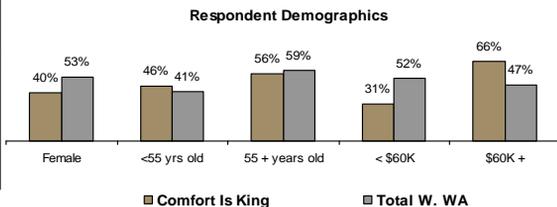
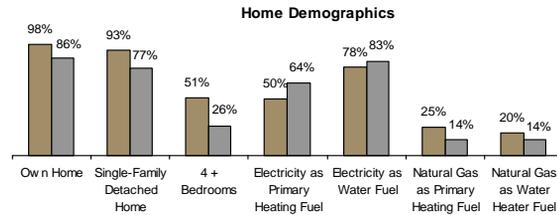
Energy-Use Actions and Attitudes
<b>Actions Perceived to Be MOST Impactful (Q23)</b>
• None
<b>Actions Perceived to Be LEAST Impactful</b>
<ul style="list-style-type: none"> <li>Replacing major appliances with more EE ones</li> <li>Driving an electric or hybrid gas-electric vehicle</li> <li>Using mass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

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



Communication
<b>BEST Way to Hear About EE Programs (Q22)</b>
<ul style="list-style-type: none"> <li>Information included with electric bill</li> <li>Newspaper, radio, or television advertising</li> </ul>
<b>How Learned About EE Programs (Q18)</b>
<ul style="list-style-type: none"> <li>Information included with electric bill</li> <li>Other promotional mailing from electric utility</li> <li>Contractor/Equipment Installer</li> </ul>
<b>Local Events Attended in last 12 Months (Q28)</b>
<ul style="list-style-type: none"> <li>Farmers markets</li> <li>Neighborhood or community events</li> </ul>

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



# 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. An additional challenge is this segment's lower levels of satisfaction with their utility, making them potentially difficult to reach.

## Potential Load Impact

- ❑ That said, the impact of even a small energy reduction could be significant as energy (gas and electric) consumption is significantly higher and homes much larger than most (though at 8% this is a 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

- ❑ Active energy conservation is not on this segment's list of priorities, possibly not even on their radar. Tying these issues to cost savings may be the only way to get their attention, given this segment's significantly higher valuation of cost savings over environmental benefit.

## Going Forward

- ❑ Although energy consumption and the environment are not priorities for this segment, the fact that they already participate in some energy efficiency activities could make it easier to further encourage this behavior than it might otherwise. However, some education would still be required to significantly change attitudes or behaviors, and some tools to help customers identify the fruits of their labor might be helpful.
- ❑ 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.

# No Interest, No Action

Brian, 56, and his wife Shayna, 54, rent a two bedroom apartment in Centralia, WA not far from their son Jeff, 30, who teaches Environmental Science at Centralia College. 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 eke out a living. They have managed to get by, but it hasn't always been easy.

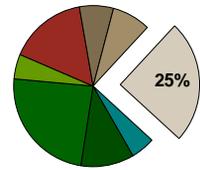
It's very stressful for Brian and Shayna when bills are due and they've recently been talking about ways to cut back and save more, so they can retire some day. Given that saving money is their top priority, Brian has been very frustrated lately with Jeff pressuring him to "live green" and help save the environment, particularly when the changes Jeff suggests they make would cost money. He knows that Jeff has a different perspective on the environment, given his chosen career and lifestyle habits, but he's not convinced that the environmental dangers are real.

For Christmas last year, Jeff gave them an "Energy Star" rated TV, which they both admit is nicer than the one they have, but their old one worked just fine. Jeff pointed out that it is an energy-efficient model, so they'll save money and help the environment. Although it was a nice thought, Brian wondered why he would spend so much money on something they didn't need and spend extra money for the "energy efficient" model. They haven't bought any appliances in a while but it seems to him that cost is really the most important factor and you especially shouldn't spend money on features you can't easily evaluate – what exactly is "Energy Star" and how is "energy efficiency" quantified or useful? Brian and Shayna do recycle, when it's convenient, but they aren't sure that really has any impact on the environment. And when it comes to replacing their light bulbs with those new energy efficient ones, Brian and Shayna don't see the need. They cost more and the odd shape makes them awkward. They tried them out for a little while, in the hopes of lowering their energy bill, but they didn't notice one bit of difference from their use.

Last month their electric bill was \$96, and it frustrated Brian because it seems they're paying more than they used to. (He even called the power company to see if there was an error; the customer service person said there wasn't and then tried to suggest some ways they could save energy – Brian hung up. Who has time for that?) It's as if the power company is charging whatever they want without paying attention to their customers. (Their power was out last winter for almost two days before anyone from the power company showed up.) Shayna recently heard on TV that some utilities charge more money so they can operate more "environmentally-friendly" – this also frustrated Brian; he thinks their utility company should worry more about keeping costs down and less about being "green".



% of Population (W.WA Region)

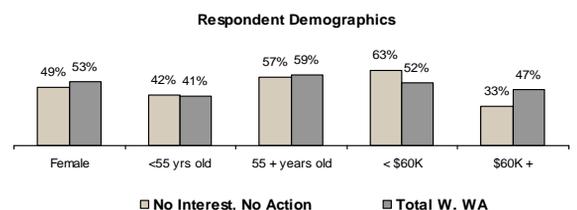
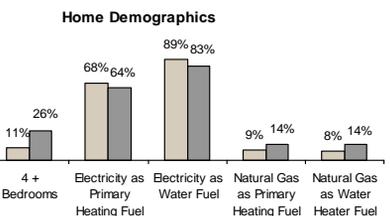


Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>• Converting electric/oil heating to natural gas</li> <li>• Replacing light bulbs/fixtures with EE ones</li> <li>• Driving an electric/hybrid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

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"> <li>• Provide more online options at utility website</li> <li>• Actively encourage customers to participate in energy/cost-saving programs</li> <li>• Operate business in completely environmentally-friendly way</li> <li>• Do everything possible to supply clean, renewable energy</li> </ul>	

Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> <li>• Information included with electric bill</li> <li>• Newspaper, radio, or television advertising</li> </ul>	
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"> <li>• Neighborhood or community events</li> <li>• Farmers markets</li> </ul>	

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"> <li>• Discount stores</li> <li>• Retail grocery stores</li> </ul>	
Key Attitudes about Shopping (Q25)	
• Generally prefer to shop in-store rather than online	



# 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, education would be required on how energy saving programs can help them and the environment, though it's unclear whether education would change attitudes or behaviors.

## Potential Load Impact

- ❑ Given the smaller home size, the potential savings to be gained with this segment may be 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 Western Washington 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 lower satisfaction with their local utility will also make it more difficult for the utility to reach these customers.
- ❑ This segment's sheer size, however, may make them a target for conservation efforts longer term.

# Eco Rejecters

Craig, 50 years old, and his wife Maureen, age 48, live in Mill Plain, in Clark County, WA. They moved to Mill Plain from Vancouver four months ago, to escape the increasing urbanization, and to raise their children in a quieter setting.

Maureen stays home to care for their children Jack, 15 and Jessica, 8, and John, 4, while Craig owns and manages a Texaco gas station on the outskirts of Vancouver. The move increased Craig's commute by a fair amount but he doesn't mind. His gas consumption may have increased but he loves driving his truck.

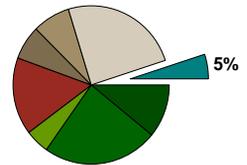
Maureen was very happy with Craig's decision to move them and she has already settled in comfortably. The less-urban setting provides better access to farmers markets, where she likes to buy flowers, and the kinds of neighborhood events she feels comfortable taking her children to. Their new (new to them) 3 bedroom house in Mill Plain is larger than the 2 bedroom they had in Vancouver, which means Jack can have his own room and she has more space to decorate.

A larger house also means higher energy bills because it now costs more money to provide the comfort they're used to. Craig realizes this but he can afford the increase and doesn't see a reason to change anything yet. His family will make adjustments as they need to, in ways he sees fit. That's the way he operates his business and runs his household. He also knows Maureen is a woman with a good head on her shoulders. He might make the major decisions for the family but he trusts her to use good judgment and quietly work to tailor family consumption if she notices the bills getting too high. His family is in great shape and can take care of itself.

Lately, Craig has gotten a little tired of everyone's focus on global environmental issues and the pressure 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 just 10 minutes from a stream where he fishes with his kids. He realizes that human's 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, with all the radio and TV talk about hybrid cars, Energy Star appliances, CFL's and 'energy audits'. Even the public utility is focusing on getting him to reduce energy consumption with information about 'rebate programs' stuffed in his utility bill, but Craig wants them to focus on reducing energy costs instead.

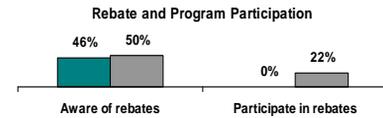
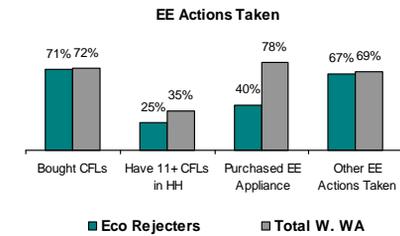


% of Population (W.WA Region)



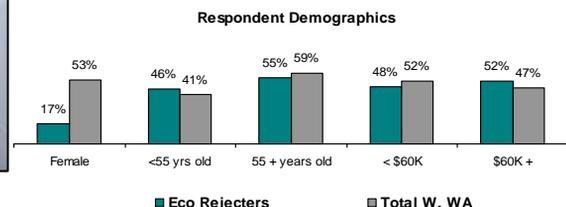
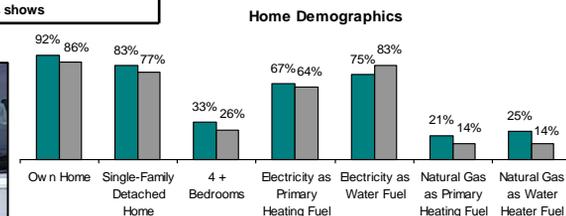
Energy-Use Actions and Attitudes
<b>Actions Perceived to Be MOST Impactful (Q23)</b>
• None
<b>Actions Perceived to Be LEAST Impactful</b>
<ul style="list-style-type: none"> <li>• Driving an electric/hybrid vehicle</li> <li>• Using mass transit instead of driving</li> <li>• Replacing regular light bulbs/fixtures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

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



Communication
<b>BEST Way to Hear About EE Programs (Q22)</b>
<ul style="list-style-type: none"> <li>• Information included with electric bill</li> <li>• Newspaper, radio, or television advertising</li> </ul>
<b>How Learned About EE Programs (Q18)</b>
• None
<b>Local Events Attended in Last 12 Months (Q28)</b>
<ul style="list-style-type: none"> <li>• Neighborhood or community events</li> <li>• Farmers markets</li> <li>• Home and garden or sportsmen's shows</li> </ul>

Shopping Habits and Attitudes
<b>MOST Important When Purchasing New Appliance (Q20)</b>
• Purchase price
<b>Stores Shopped Most in Past Month (Q24)</b>
<ul style="list-style-type: none"> <li>• Discount stores</li> <li>• Home improvement stores</li> </ul>
<b>Key Attitudes about Shopping (Q25)</b>
• 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 almost impossible to market to 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 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 moderate sized homes, the unwillingness of Eco Rejecters to recognize a need will make this a herculean challenge.
- Fortunately, this segment represents only a small portion of the Western Washington Regional customer base at 5%.

## 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.