

**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**



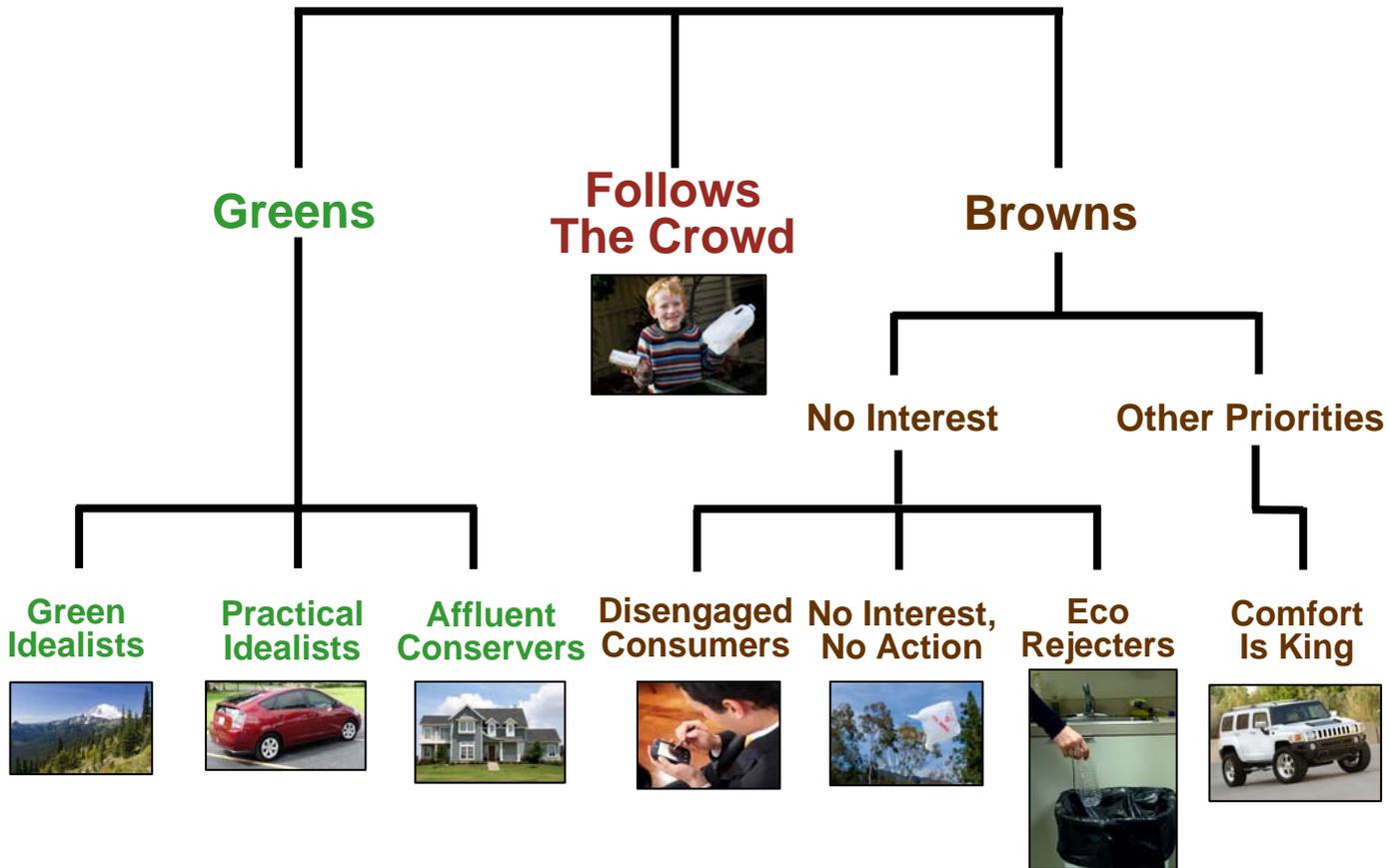
# **Residential Segmentation Research**

## **Personalizations**

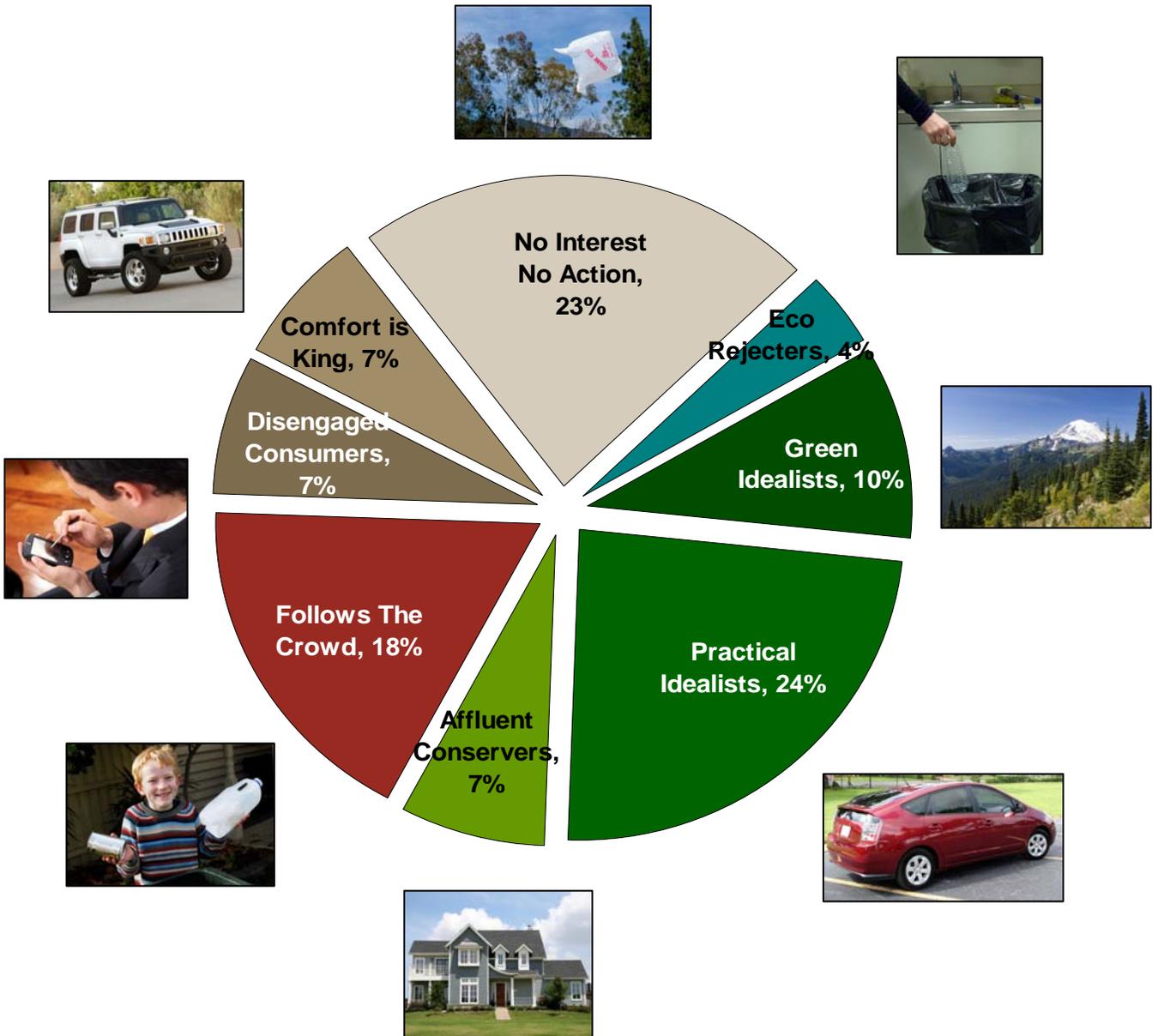
**Western OR Region**

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; great deal of interest in “new programs” tested in the survey
- ❑ Majority are women; one of segments with lowest income; smaller homes than most; 2<sup>nd</sup> largest proportion of renters; low natural gas penetration



## 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
- ❑ Conservation activities above average - Awareness of rebate programs, use of CFLs & engaging in “other” energy efficiency activities at home (i.e. upgrading insulation) on par with Green Idealists; purchase of energy efficient appliances & 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 lower than for Green Idealists
- ❑ Larger proportion of home owners (97%) than the Green Idealists; homes are larger than most segments; one of the most educated segments



## Affluent Conservers, 7%

- ❑ Most affluent; all are home owners; 2<sup>nd</sup> largest homes on average (most with 3+ bedrooms); majority are women; most educated
- ❑ Higher N.G. penetration than all other segments; 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 relatively high number of CFLs installed, energy efficient appliance purchases and “other” conservation measures taken (i.e. upgrading insulation) at a rate similar to the Practical Idealists; cost savings still primary motivator behind energy efficient appliance purchase
- ❑ Similar to Practical Idealists, more interested than most in a “green” utility; impressions of their local utility are very positive, similar to the Practical Idealists



# BPA Customer Segments – In the Middle

## Follows The Crowd, 18%

- ❑ “Average” BPA (non-Puget Sound area) customer demographically – slightly more women responders, most 55+ years old, most living in single-family detached homes, and incomes of about \$55K
- ❑ 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 generally – more so than most “brown” segments but less so than the “green” segments
- ❑ Do purchase CFLs and energy efficient appliances as well as make some “other” energy efficient 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
- ❑ Much lower opinions of their local utility than the “green” segments, though more positive than the “browns”



# 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
- ❑ One of the segments least likely to engage in some energy conservation activities than most other segments, including purchasing energy efficient appliances (including slightly less awareness of appliance rebate programs) and CFL purchases; has taken some “other” conservation actions, including installing low flow showerheads.
- ❑ One of the least interested segments in the “new” programs tested in the survey
- ❑ “Green” utility is less important than for most segments, though not insignificant number interested in utility pursuing green initiatives at a higher cost; 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 or less bedrooms, have incomes of about \$52K, and perceive their electricity bills to be about \$90 a month in the summer.



## No Interest, No Action, 23%

- ❑ One of least educated, lowest earning, least optimistic about their future, lowest proportion of home owners / highest proportion of renters; smallest homes (most 1-2 bedrooms); electricity use similar to other segments, despite smaller residences
- ❑ Unconcerned with controlling energy use / energy costs and the environmental impact; one of 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 most segments; 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 lower than for any other segment



# BPA Customer Segments – The “Browns”

## Eco Rejecters, 4%

- ❑ 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 participate in appliance rebate programs, or take “other” conservation actions in their homes, and are least likely to notice any savings from those actions if they did do something
- ❑ Despite these beliefs, most purchasing an appliance in the last 12 months did buy an energy efficient model (though probably not by design)
- ❑ Extremely low interest in the “new” programs tested in the survey
- ❑ “Green” efforts by the utility is not valued by this segment, with keeping costs as low as possible of primary importance; some of the lowest satisfaction levels with their utility
- ❑ Majority are men; all own their homes, with most having 3 bedrooms; above average incomes (\$71K); energy slightly above the average BPA (non-Puget Sound area) customer



## Comfort is King, 7%

- ❑ All are home owners; largest homes with most having 3-4+ bedrooms; above average energy use for electricity and natural gas; highest AC penetration; 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
- ❑ 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 “other” energy efficient activities (i.e. upgrading insulation); participation in rebate programs, however, is slightly higher than all other segments; cost savings primary motivator
- ❑ In considering using / purchasing energy using appliances comfort and presence of desired features / functions most important.
- ❑ A utility that keeps costs as low as possible is paramount; satisfaction with local utility is lower than most segments



# Green Idealists

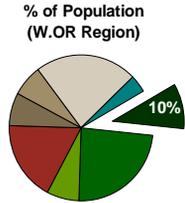
Jenn is 55 years old and lives in Eugene, OR where she works for the Parks and Recreation Department as a Program Coordinator. She and her husband Paul, 56, live in a three-bedroom, one-story house in a quiet neighborhood. Paul manages his own coffee shop near the U of O where he caters to the volumes of students who come seeking his Fair-Trade certified coffees. 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 it does mean they have to get creative sometimes to make the dollars stretch. Paul is pretty handy so they do some home improvement projects themselves to save a little money.

They also try to do what they can to keep their energy use down and conserve where they can because the environment is very important to both of them. Both Jenn and Paul do as much as they can, on a daily basis, to help protect the environment. They are avid recyclers, they replaced a lot of their light bulbs with CFLs, they turn off their lights and adjust their thermostats to conserve as much as possible and Paul even rides his bike to work. Protecting the environment is so important to them and, as an added bonus, they have noticed they are able to save a little money!

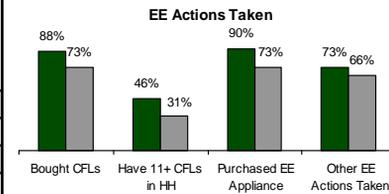
When they can, they tackle bigger projects and they hope they'll be able to replace their downstairs windows before next winter. They need to upgrade their insulation as well, but need to save a bit more money before they'll be ready to tackle that project (they have to watch their budget). They just replaced their hot water heater with a more efficient one, but some of their other appliances also need upgrading, like their washer and dryer. When they are finally ready to buy some new ones Jenn plans to research their options very carefully in order to make the "greenest" possible purchase even though she knows it may mean paying a bit more. She understands change starts with each of us. Jenn had read something recently about the impact of installing low-flow showerheads in homes and since it was relatively inexpensive to do she insisted Paul take care of that as soon as possible.

Jenn and her husband have also participated in the appliance rebate program offered by their utility. She wants to do everything she can, but she does still have some questions about what types of appliances qualify for the rebate. So far she's generally been able to find what she needs to know on her utility's website which saves a lot of time spent on the phone asking questions. It's very important to her that her utility offer programs like these and she's very proud that she lives in an area that is served by a utility that is working to be environmentally responsible!

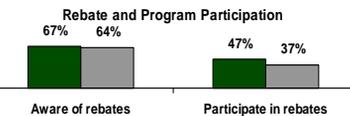


Energy-Use Actions and Attitudes	
<b>Actions Perceived to Be MOST Impactful (Q23)</b>	
<ul style="list-style-type: none"> <li>Recycling paper, cans, bottles and plastics</li> <li>Setting heating or cooling thermostats to use less energy</li> <li>Replacing regular light bulbs and fixtures with EE ones</li> <li>Installing additional or upgraded insulation or windows</li> <li>Using mass transit instead of driving</li> <li>Driving an electric/ hybrid vehicle</li> <li>Replacing major appliances with more EE ones</li> </ul>	
<b>Actions Perceived to Be LEAST Impactful</b>	
<ul style="list-style-type: none"> <li>Converting electric or fuel oil heating to natural gas</li> </ul>	
<b>MOST likely to participate in (Q19)</b>	
<ul style="list-style-type: none"> <li>Program that provides incentives for using CFLs</li> <li>Program w/ incentives to increase efficiency of existing heating/cooling system</li> <li>Program for installing a home device that allows you to monitor electricity usage</li> </ul>	
<b>LEAST likely to participate in</b>	
<ul style="list-style-type: none"> <li>None</li> </ul>	
<b>Energy-Use Attitudes – MOST Agree (Q21, Q2)</b>	
<ul style="list-style-type: none"> <li>Believe it is socially responsible to limit use of electricity</li> <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>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>It's worth spending more for an EE electric appliance/device</li> <li>Regularly review home's energy usage</li> <li>Want appliances that are simple to use</li> <li>Very concerned about environmental effects of electric plants</li> <li>Very optimistic about your own future</li> </ul>	
<b>Energy-Use Attitudes – LEAST Agree</b>	
<ul style="list-style-type: none"> <li>Always purchase most advanced products</li> <li>The most important thing about heating/AC is comfort</li> <li>It's important for appliances to save time/effort</li> </ul>	

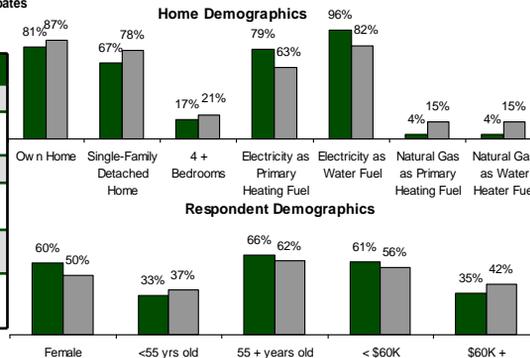
My Utility Company	
<b>MOST Important Utility Company Functions (Q29)</b>	
<ul style="list-style-type: none"> <li>Actively encourage customers to participate in energy and cost savings programs</li> <li>Do everything possible to supply renewable, clean energy</li> <li>Operate business completely environmentally-friendly</li> </ul>	
<b>LEAST Important Utility Company Functions</b>	
<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	
<b>MOST Important When Purchasing New Appliance (Q20)</b>	
<ul style="list-style-type: none"> <li>Cost savings from reduced electricity usage</li> <li>Positive impact on environment from less energy</li> <li>Discounts for buying an EE appliance</li> <li>Purchase price</li> </ul>	
<b>Stores Shopped Most in Past Month (Q24)</b>	
<ul style="list-style-type: none"> <li>Retail grocery stores</li> <li>Discount stores</li> </ul>	
<b>Key Attitudes about Shopping (Q25)</b>	
<ul style="list-style-type: none"> <li>Generally prefer to shop and make purchases in-store rather than online</li> <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	
<b>BEST Way to Hear About EE Programs (Q22)</b>	
<ul style="list-style-type: none"> <li>Information included with your electric bill</li> <li>Newspaper, radio or TV advertising</li> </ul>	
<b>How Learned About EE Programs (Q18)</b>	
<ul style="list-style-type: none"> <li>Information included with your electric bill</li> <li>Other promotional mailing</li> </ul>	
<b>Local Events Attended in Last 12 Months (Q28)</b>	
<ul style="list-style-type: none"> <li>Farmers market</li> <li>Concerts, plays or operas</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. Furthermore, satisfaction with their utility is high, as well as acceptance of their utility pursuing initiatives at increased cost, 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 the other segments, particularly the Comfort is King and Practical Idealists 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. Furthermore, the majority have noticed savings from previous conservation actions taken, making future involvement more likely.

## Going Forward

- ❑ Despite this segment's "green-ness" there is a lot of potential ground to be gained in terms of greater participation in rebate programs and CFL use.
- ❑ Preferred channels for shopping generally and learning about energy related programs specifically are similar to the other segments, though this segment has a significantly greater proclivity for receiving energy efficiency program information via utility email.
- ❑ 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 and her husband Paul live in Cottage Grove in Lane County, having moved from Eugene 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 Cottage Grove.

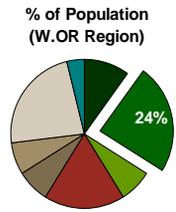
Finally they have the space they've always wanted for their family in a much newer home than their previous one, having been built in the late 80's. They were also able to afford a few "extras" this time around in their 2,700 square foot home, with a large rec room for their daughter and their friends (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 in Eugene. 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.

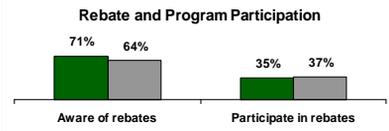
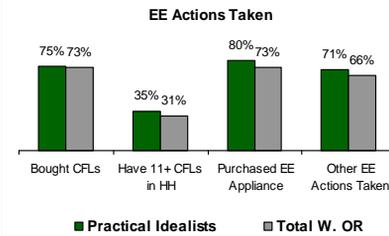
It is important to her that her utility do everything possible to supply renewable, "green" energy and operate in an environmentally-friendly way as well as encourage all customers to conserve energy where they can.

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.

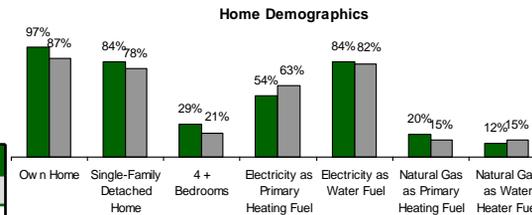


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<b>Actions Perceived to Be LEAST Impactful</b>	
<ul style="list-style-type: none"> <li>Converting electric or fuel oil to natural gas</li> </ul>	
<b>MOST likely to participate in (Q19)</b>	
<ul style="list-style-type: none"> <li>None</li> </ul>	
<b>LEAST likely to participate in</b>	
<ul style="list-style-type: none"> <li>Program that provides incentives to purchase EE heating or cooling system</li> <li>Home weatherization program</li> <li>Program w/incentives to purchase EE products</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>Believe it's socially responsible to limit use of electricity</li> <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>Pay a lot of attention to energy-related issues because they affect my home and the country as a whole</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 want appliances that are simple to use</li> <li>It's worth spending more for an EE electric appliance/device</li> </ul>	
<b>Energy-Use Attitudes – LEAST Agree</b>	
<ul style="list-style-type: none"> <li>Always purchase most advanced products</li> <li>Prefer customizable products that meet exact needs</li> <li>The most important thing about heating/AC is comfort</li> <li>It's worth spending money for highest quality products</li> <li>It's important for appliances to save time/effort</li> </ul>	

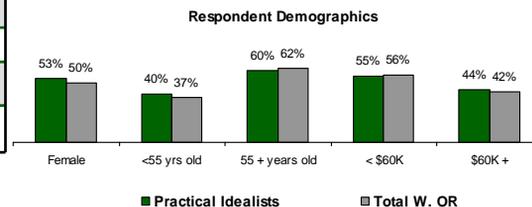
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<b>MOST Important Utility Company Functions (Q29)</b>	
<ul style="list-style-type: none"> <li>Do everything possible to supply renewable, clean energy</li> <li>Operate its business in a completely environmentally-friendly manner</li> <li>Actively encourage customers to participate in energy and cost savings programs</li> </ul>	
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<b>Local Events Attended in Last 12 Months (Q28)</b>	
<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.

## 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

- ❑ There's a good deal of interest in participating more in rebate programs for CFLs and programs that install a device for monitoring electricity use and potential for participation (or in the case of CFLs, greater participation).

## Going Forward

- ❑ This segment's history of engaging in energy efficiency behaviors and large size suggest they will be likely to continue doing so in the future, and make them a lucrative segment in terms of energy savings.
- ❑ As with the Green Idealists, marketing to the female head of the household may be most effective since again it appears they have sole responsibility for many energy related decisions.

# Affluent Conservers

Linda, age 62, her husband Jim, 65, and their daughter Hannah, 24, live in Eugene near the University of Oregon campus. Linda likes her job as head librarian at the college and her husband Jim is a financial advisor at a local bank branch.

Linda and Jim upgraded to a new four-bedroom, 3,200 square foot home about 10 years ago and they are looking forward to retiring there. They built it with the idea that they would have several children – but not long after Hannah was born Linda was promoted in her job and she and Jim postponed having more kids.

Linda believes they don't really do more than the average person in terms of watching electricity costs. She will look at their energy bills to make sure things don't look completely out of line, but really they are financially secure enough that they don't need to worry about these costs too much. Even though she doesn't worry too much about energy costs, Linda does encourage her family to turn adjust the thermostats when they can, so that they use less energy. And under Hannah's watchful eye, the family has been separating recycling out from the garbage, at least most of the time.

In preparation for buying a new washer and dryer, Linda did some online research, and read that energy efficient models are supposed to save you money. She didn't want to pay an arm and a leg for a new energy efficient washer and dryer, but the price turned out to be just a little more than the others. It seemed to have all the features she was looking for anyway and it is supposed to save them money in the long run. She's not sure it will really save them money like the label says, but she figured it certainly wouldn't hurt. The sales clerk had also mentioned something about being able to apply for a rebate to get some money back since she bought the one the "Energy Star" rating, which she plans to investigate on her utility's website later.

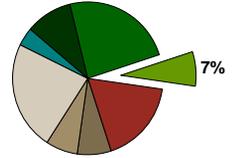
Her and her husband saw something in their electric bill about a program that would allow them to install a home device for monitoring their energy usage. Though she doesn't usually buy into the energy-restricting lifestyle she likes the idea of having a device that gives her more insight into and control over her environment.

Linda's not someone that believes global warming is as much of a threat as people say. That said, she does buy some CFLs for areas of the home that aren't "publicly" visible and she is pleased that her household is recycling as much as possible.

Linda feels that the best example for environmental concern should be set by her utility and that it should operating in a more environmentally-friendly way and do everything possible to supply clean, renewable energy. Furthermore, not everyone knows what they can do to conserve so its also important that utilities help customers understand how they can do their part and she trusts her utility to do what's right for her local community.

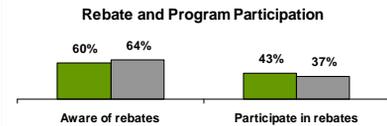
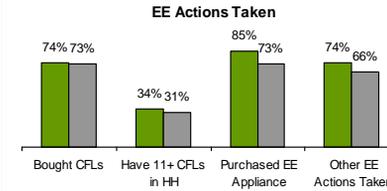


% of Population (W.OR Region)



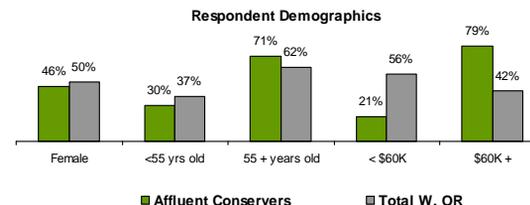
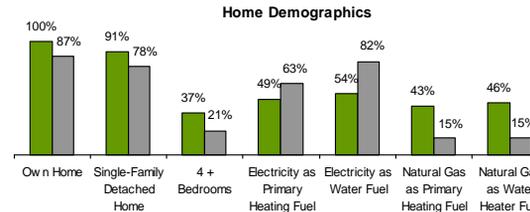
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Actions Perceived to Be MOST Impactful (Q23)	
<ul style="list-style-type: none"> <li>Recycling paper, cans, bottles and plastics</li> <li>Setting heating or cooling thermostats to use less energy</li> <li>Installing additional or upgraded insulation or windows</li> </ul>	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>Driving an electric/hybrid vehicle</li> <li>Converting electric/oil heating to natural gas</li> <li>Using mass transit instead of driving</li> <li>Replacing major appliances with more EE ones</li> </ul>	
MOST likely to participate in (Q19)	
<ul style="list-style-type: none"> <li>None</li> </ul>	
LEAST likely to participate in	
<ul style="list-style-type: none"> <li>Program w/ incentives to increase efficiency of existing heating/cooling system</li> <li>Program w/incentives to buy CFLs</li> <li>Program with incentives for purchasing highest efficiency heating/cooling system</li> <li>Home weatherization program</li> <li>Program w/incentives to buy EE home electronics</li> </ul>	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
<ul style="list-style-type: none"> <li>You want appliances that are simple to use.</li> </ul>	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> <li>Always purchase most advanced products</li> <li>Very concerned about environmental effects of electric plants</li> <li>It's worth spending more for the highest quality products</li> <li>Long term threat of global warming is real and potentially catastrophic</li> <li>Prefer customizable products that meet exact needs</li> <li>You constantly look for ways to save on energy costs</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 saving 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 customers on utility 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>Purchase price</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 in-store rather than online</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>Some "other" method</li> <li>Other promotional mailing</li> </ul>	
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> <li>Benefits or charity events</li> <li>Neighborhood or community events</li> </ul>	



# Segment Implications – Affluent Conservers



## Marketing Effort

- ❑ Affluent Conservers will be a bit more difficult to market to than the other “green” segments, 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 much larger than most and electric bills are also slightly higher than average despite the highest penetration of natural gas. With income significantly higher on average than any other segment, Affluent Conservers probably also have the financial means to make energy efficient improvements to their homes, assuming they saw the value of it. At only 7% of Western Oregon regional customers, however, it is one of the smallest segments.

## Penetration

- ❑ Interest in the potential energy conservation programs tested is lower than either of the other two green segments. The best potential program for this segment appears to be the installment of a home device for monitoring energy usage.

## 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 and other conservation actions that can be taken in the home may increase segment participation.
- ❑ While a comparatively high proportion have participated in rebate programs (43%), there is still a lot of ground to be gained in terms of greater participation.

# Follows The Crowd

Diane is 54 years old and lives in Junction City, OR where she has been a teacher at Oaklea Middle School for 21 years. She and her husband Mitch and their son Lucas, 13, 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 Junction City from Portland as newly-weds. Over the years when they've had time (or didn't have the money to hire someone!) they've made a few home improvements here and there and they still can't believe how different it looks now with all the work that's been done.

On most Saturdays in spring and summer Jennifer and Lucas can be found at the local 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 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 – or at the very least, focus on keeping costs low while doing all these things. Diane thinks more people should try to conserve energy themselves and not wait for some community program or their utility company to encourage them.

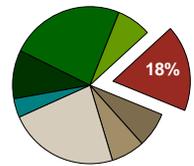
Diane did pick up some information on energy conservation and that spurred her to start talking more with her family about the concept of conserving energy, like turning off lights when no one is in the room. She's not sure they'll keep up watching their bill so closely every month, but it's a start. 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 a new refrigerator a little bit (Diane really wants the kind with the freezer drawer on the bottom), but their limited search turned up only really expensive models and they want to be sure that any money spent upfront will be made up in energy-efficiency. They also talked about whether they should finally replace some of the old windows in their house that make the downstairs a bit drafty.

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. She got a special flyer from her utility company the other day, talking about a program with incentives for purchasing and using CFLs. She needs more details on the program but she's considering trying it.

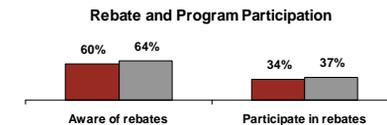
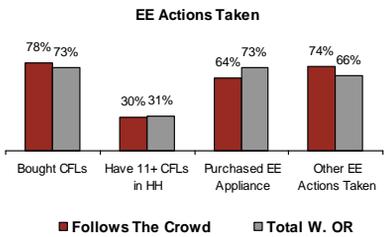


% of Population (W.OR Region)



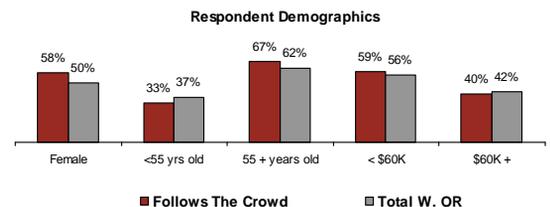
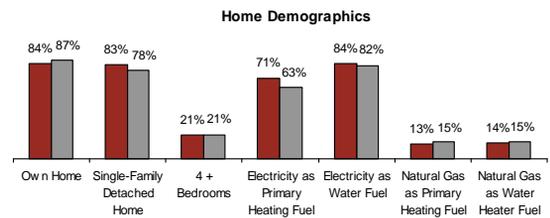
Energy-Use Actions and Attitudes
<b>Actions Perceived to Be MOST Impactful (Q23)</b>
<ul style="list-style-type: none"> <li>Recycling paper, cans, bottles and plastics</li> <li>Installing additional or upgraded insulation or windows</li> </ul>
<b>Actions Perceived to Be LEAST Impactful</b>
<ul style="list-style-type: 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 with incentives for purchasing highest efficiency heating/cooling system</li> <li>Program with incentives to increase efficiency of existing heating/cooling systems</li> <li>Home weatherization program</li> <li>Program for installing a home device that allows you to monitor electricity usage</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> <li>Believe it's socially responsible to limit use of electricity</li> </ul>
<b>Energy-Use Attitudes – LEAST Agree</b>
<ul style="list-style-type: none"> <li>Always purchase the most advanced products</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>The most important thing about heating/AC is comfort</li> <li>Very concerned about environmental effects of electric plants</li> <li>You are very optimistic about your own future</li> <li>It's worth spending more for an EE electric appliance/device</li> <li>Pay a lot of attention to energy-related issues because they affect my home and the country as a whole</li> <li>Regularly review your home's energy usage</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>Operate 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 renewable, clean energy</li> </ul>



Shopping Habits and Attitudes
<b>MOST Important When Purchasing New Appliance (Q20)</b>
<ul style="list-style-type: none"> <li>Cost savings over environmental benefit</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>

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>Some "other" method</li> <li>Other promotional mailing</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>



# 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

- ❑ Homes in this segment are generally on par with the average Western Oregon regional home in terms of size and perceptions of electricity bills are slightly below average.
- ❑ Despite the fact that this segment may have fewer potential end uses than some given the size of their homes, this segment does contain a pretty significant share of the regional customer base (18%)

## Receptivity to Future Conservation Programs

- ❑ With the exception of an incentive offering for CFLs, 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, with a lower average income than some, finances may also be a barrier for participation in some programs.

## Going Forward

- ❑ The fact that this segment is so gung ho 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 CFLs, 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

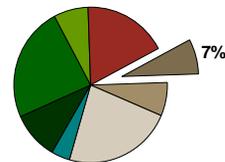
Daniel, 56, and his wife Mary, 54, live in Newport, Oregon where Daniel is a real estate agent. They bought the three-bedroom home they live in over a decade ago and were able to find a good deal through Daniel's work connections. Three years ago they adopted the 8 year old son, James, and 9 year old daughter, Amy, of a friend who passed away, and now their second and third bedroom are put to good use.

There are many things the couple love about living in Newport, most important of which is the beach. Newport is also close enough to a large, rural, farming community to make the weekly trips to the farmers market quite a treat. On summer weekends Daniel and Mary like to take their kids to attend local kid-friendly concerts and some weekends they'll even go further afield to enjoy some of the outdoor concerts put on in Corvallis, Eugene or Portland. It was at one of these concerts, sponsored by local "green" businesses, that they came across a booth featuring CFLs, and took home a free bulb to try. They'd heard about these new light bulbs and the rebates you can get from your power company (which they haven't sent in) but they admit they don't entirely understand how changing a few light bulbs can help the environment. They have seen fliers in their utility bill, recommending they buy energy efficient appliances and participate in a rebate program. They haven't purchased any large appliances in awhile, however, and really haven't had the time (or interest) to do much research. For the most part, the appliances they have work just fine, though the last time they had a need to replace their hot water heater they did buy an energy efficient model. For the most part they don't put a lot of thought into the latest, customized technology or appliances, much less how they affect the environment or their household's energy use – there just isn't time for all that.

When it comes to conserving energy at home, Daniel and Mary don't give it too much consideration. 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. Lately they have been seeing a lot of new programs, initiatives and other pressures coming from the utility to get them to conserve energy in their homes and "do their part". While Daniel and Mary agree that some utility initiatives are worthwhile and should be pursued regardless of cost, they don't feel it is important for their utility to be putting so much effort into prodding customers to participate in energy programs.

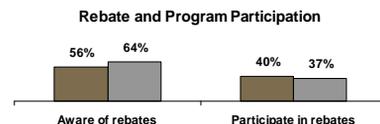
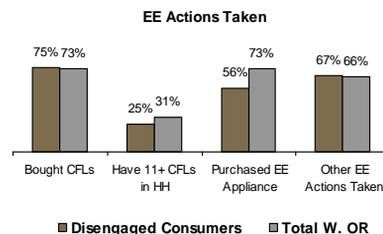


% of Population (W.OR Region)



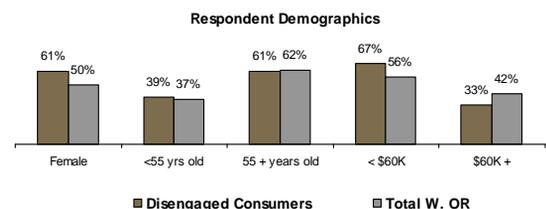
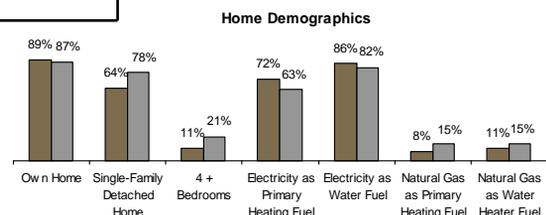
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>• Converting electric/oil heating to natural gas</li> <li>• Replacing major appliances with more EE ones</li> <li>• Replacing light bulbs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

My Utility Company	
MOST Important Utility Company Functions (Q29)	
• None	
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)	
• Information included with electric bill	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> <li>• Information included with electric bill</li> <li>• Some "other" method</li> </ul>	
Local Events Attended in last 12 Months (Q28)	
<ul style="list-style-type: none"> <li>• Farmers markets</li> <li>• Concerts, plays or operas</li> </ul>	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
• Cost savings over environmental benefit	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> <li>• Retail grocery stores</li> <li>• Discount stores</li> </ul>	
Key Attitudes about Shopping (Q25)	
• None	



# Segment Implications – Disengaged Consumers



## Marketing Effort

- ❑ Disengaged Consumers will probably be fairly difficult to market to, as energy costs and the impact of energy consumption on the environment are not a high priority for them. While many in this segment believe that global warming is real and a significant problem, they seem not to associate that with their own personal energy use.

## Potential Load Impact

- ❑ Houses in this segment are moderate with most having 3 or fewer bedrooms.
- ❑ Overall energy usage is slightly lower than the average customer in this region.
- ❑ At 7% of the total customer base in the Western Oregon region, this segment represents a fairly small portion of the total.

## Penetration

- ❑ While this segment has engaged in *some* energy efficiency behaviors, their relatively unengaged attitudes suggest this may not have been intentional, making it unclear how likely they will be to continue to do so in the future.
- ❑ Receptivity to “new” energy efficiency programs was the lowest among the segments, on par with Eco Rejecters.

## 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.
- ❑ The majority of this segment are women, and female household members are thought to be making more of the decisions regarding energy use and purchases in the home and are more often the one to pay the energy bill, potentially making them better targets for marketing.
- ❑ Lower satisfaction with their local utility will also make this segment more difficult to market to.

# Comfort Is King

Robert, age 55, and his wife Carrie, 54, live in Tillamook, where Robert works as a marketing manager for the Tillamook Cheese Co. and Carrie is a stay-at-home mom. Robert has been with his company nearly 22 years – and through many promotions – and spends large amounts of time on the road throughout the Northwest. They have two sons, Sam and John, and have lived in the same four-bedroom house they bought new just before the youngest, 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. 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. (They also take full advantage of their central air conditioning system in the summer.)

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 Sam 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 TV's on at the same time in each of their bedrooms, the kitchen and in the family room, where the Robert's prized big screen is kept. All this does result in large utility bills, but Robert has worked hard to provide his family with these luxuries.

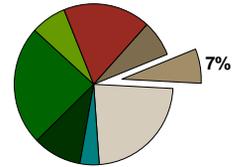
Even though Carrie understands this and appreciates the luxury they can afford, she tries to do her part to save money in small ways. If nothing else, it sets a good example for the children. She upgrades their appliances fairly regularly and lately she has taken to paying a little more for energy efficient ones (though only the nice ones with all the new features) and then submitting the rebates to the utility. She has seen the utility bill pamphlets that sermonize on "saving" the environment by buying these appliances and conserving energy, but Carrie participates for the cost savings, not the environmental benefit.

Robert doesn't care much for the conservation hype but he doesn't see a problem with letting Carrie buy her energy efficient appliances, or make little adjustments here and there to save money. Sam recently brought home a CFL light bulb he got at school and told his parents they should replace all of their light bulbs with them. Robert won't accept CFLs all over the house, they are so ugly, but he is indulging Sam and letting him put CFLs in his room and a few other out of the way spots. Robert is used to all the environmental buzzwords and whatnot, but at the end of the day he doubts global warming is as big a problem as people are saying. His family does its 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.

Robert understands the NW mentality and he sees that influence permeate the utility company as well, but it's getting a little old. Robert would prefer the utility focus on keeping costs low, not pursuing initiatives at higher cost and trying to get him and his family to participate in them.

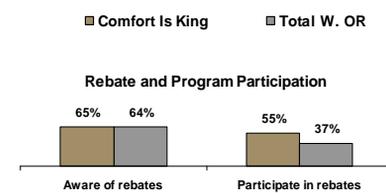
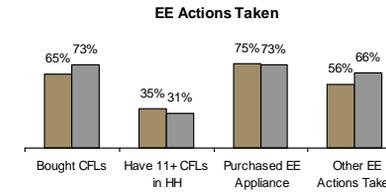


% of Population (W.OR Region)



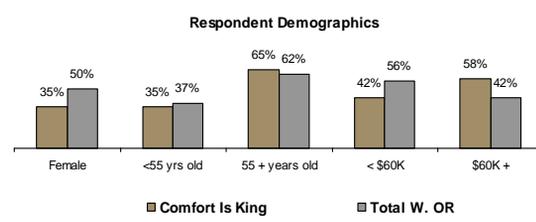
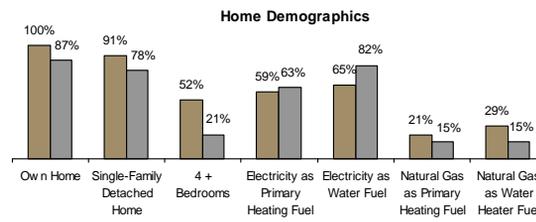
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>Driving an electric or hybrid gas-electric vehicle</li> <li>Replacing major appliances with more EE ones</li> <li>Using mass transit instead of driving</li> <li>Converting electric/oil heating to natural gas</li> <li>Replacing light bulbs and fixtures with EE ones</li> <li>Setting heating/cooling thermostats to use less energy</li> </ul>	
MOST likely to participate in (Q19)	
• None	
LEAST likely to participate in (Q19)	
<ul style="list-style-type: none"> <li>Program w/incentives to buy EE home electronics</li> <li>Program w/incentives to help increase efficiency of existing heating/cooling system</li> <li>Program w/incentives to buy CFLs</li> <li>Home weatherization program</li> <li>Program w/incentives to buy highest EE heating/cooling system</li> <li>Program to install a home device that allows you to monitor electricity usage</li> </ul>	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
• You are very optimistic about your own future	
Energy-Use Attitudes – LEAST Agree	
<ul style="list-style-type: none"> <li>Always buy most advanced products/technologies</li> <li>Long term threat of global warming/climate change is real and potentially catastrophic</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>Believe it's socially responsible to limit electricity use</li> <li>Pay a lot of attention to energy-related issues because they affect both your home and country as a whole</li> <li>It's worth spending more to get the highest quality products</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>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	
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"> <li>Concerts, plays or operas</li> <li>Farmers markets</li> <li>Neighborhood or community events</li> <li>Benefits or charity events</li> <li>Local sporting events like 10K runs or softball tournaments</li> </ul>	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
• Cost savings over environmental benefit	
Stores Shopped Most in Past Month (Q24)	
• Discount stores	• Retail grocery stores
Key Attitudes about Shopping (Q25)	
• Generally prefer to shop in-store rather than online	



# Segment Implications – Comfort is King



## Marketing Effort

- The Comfort is King segment would be fairly difficult to market to as they are generally unconcerned with energy costs or the impact of energy consumption on the environment.
- An additional challenge is this segment's relatively lower levels of satisfaction with their utility, particularly with regards to its degree of caring about the needs of the local community and helping its customers to save money.

## Potential Load Impact

- That said, potential load impact of even a small energy reduction could be significant as energy (gas and electric) consumption is greater and homes are larger than in any other segment (though at 7% this is a fairly 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, and the "new" programs tested did not generate a lot of interest.
- Tying these issues to cost savings may be the best way to get their attention.

## Going Forward

- Although energy consumption and the environment are not this segment's priorities, the fact that they already participate in some conservation activities (the majority are aware of utility rebates and the highest percentage, of any segment, have participated) could potentially make it easier to further encourage this behavior.
- 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.
- Lower satisfaction with the local utility will also make it more difficult to market to these customers through this channel. In fact, more than any other segment, this segment prefers to get information about new appliances through contractors or other appliance or tech specialists.
- 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 Tillamook, Oregon, not far from their son Jeff, 30, who teaches Environmental Science at the Tillamook Bay Community 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.

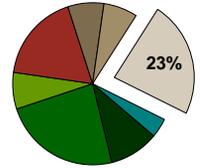
It's very stressful for Brian and Shayna when bills are due and they've recently been talking about ways to cut back and save more, so they can retire some day. Given that saving money is their top priority, Brian has been very frustrated lately with Jeff pressuring him to "live green" and help save 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 a new TV, that he pointed out that it was an energy-efficient model, so they'll save money *and* help the environment. Although Jeff meant well, Brian wondered why he would spend so much money on something they didn't need to replace, and spend extra money to get an "energy efficient" model made no sense to Brian. He's seen utility pamphlets on energy efficient appliances and how they are supposed to save money over time, but Brian doesn't have extra money lying around to buy a more expensive model of something he needs, and trust the money will come back to him in the future. 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 don't need – like an Energy Star rating. Brian and Shayna do recycle, when they can, 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 also checked their bill for a couple of months after installing a few of those strange bulbs they got for free from a booth their utility had at a farmer's market and didn't see a difference.

Brian and Shayna focus most of their energy just trying to stay afloat, and as their situation persists it's hard to be optimistic about the future. Their electric bill was \$95 last month 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 environmental.

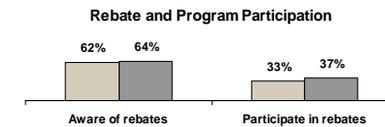
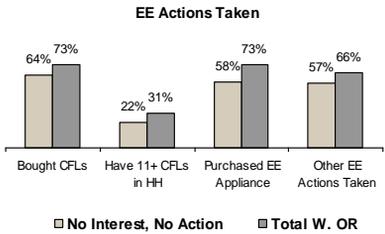


% of Population (W.OR Region)



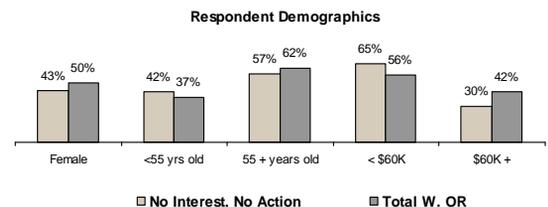
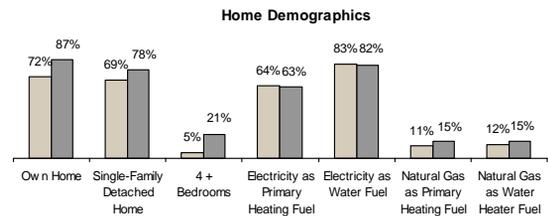
Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>• Converting electric/oil heating to natural gas</li> <li>• Driving an electric/hybrid vehicle</li> <li>• Replacing major appliances with EE ones</li> <li>• Replacing light bulbs/fixtures with EE ones</li> <li>• Using mass transit instead of driving</li> <li>• Installing additional/upgraded insulation or windows</li> <li>• Setting heating/cooling thermostats to use less energy</li> </ul>	
MOST likely to participate in (Q19)	
• None	
LEAST likely to participate in	
<ul style="list-style-type: none"> <li>• Program w/incentives to increase efficiency of existing heating/cooling system</li> <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 buy CFLs</li> <li>• Program to install home device that allows you to monitor electricity usage</li> </ul>	
Energy-Use Attitudes – MOST Agree (Q21, Q2)	
• None	
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 to get the highest quality product</li> <li>• It's worth spending more for EE electric appliance/device</li> <li>• Prefer customizable products that meet exact needs</li> <li>• You constantly look for ways to save on energy costs</li> <li>• Very concerned about environmental effects of electric plants</li> <li>• It's very important that appliances save time/effort</li> <li>• Long term threat from global warming/climate change is real and potentially catastrophic</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	
MOST Important Utility Company Functions (Q29)	
• None	
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)	
• 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"> <li>• Farmers markets</li> <li>• Neighborhood or community events</li> </ul>	

Shopping Habits and Attitudes	
MOST Important When Purchasing New Appliance (Q20)	
• Cost savings over environmental benefit	
Stores Shopped Most in Past Month (Q24)	
<ul style="list-style-type: none"> <li>• Retail grocery stores</li> <li>• Discount 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 would be fairly difficult to market to as they are generally unconcerned with trying to control 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 its 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 one of the largest customer segments (second only to Practical Idealists), 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 market to these customers.
- This segment's sheer size, however, may make them a target for conservation efforts longer term.

# Eco Rejecters

Craig, 5 years old, and his wife Maureen, age 54, live in St. Helens in Columbia County, having moved from Vancouver, Washington about a year ago. Maureen is the bookkeeper at the local branch of the Methodist Church, while Craig owns and manages a Texaco gas station in Scappoose. Craig's commute is longer than he would like, but he doesn't mind too much. His truck's gas consumption may be more than his wife's sedan, but he loves driving his truck.

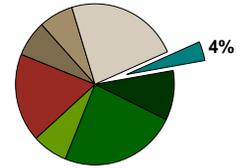
Maureen was very happy with Craig's decision to move them and she has already settled in comfortably. The less-urban setting is quieter but she can still drive to Portland for the annual Home and Garden show. Their new (new to them) 3 bedroom house in is larger than the 2 bedroom they had in Vancouver, which means 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. He and his wife 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 two but he trusts her to use good judgment and quietly work to tailor consumption if she notices the bills getting too high. His family 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 on the weekends. 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 'rebate programs', incentive programs, etc. but Craig thinks they should be focusing on reducing energy costs instead. When it comes to spending the money he's worked hard for, Craig wants to spend it on something valuable. Getting something he can use or something he wants and saving as much money as he can in the process, that's value. The impact of his purchases on the environment doesn't enter into the equation and he certainly wouldn't choose environmental benefit over saving money.



% of Population (W.OR Region)

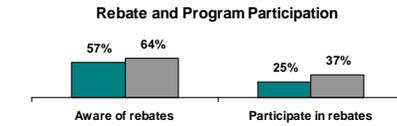
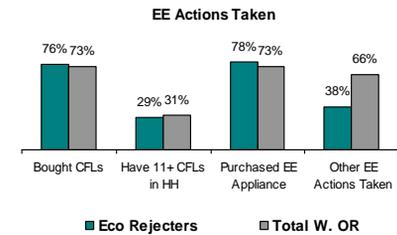


Energy-Use Actions and Attitudes	
Actions Perceived to Be MOST Impactful (Q23)	
• None	
Actions Perceived to Be LEAST Impactful	
<ul style="list-style-type: none"> <li>Driving an electric/hybrid vehicle</li> <li>Using mass transit instead of driving</li> <li>Replacing regular light bulbs/fixtures with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

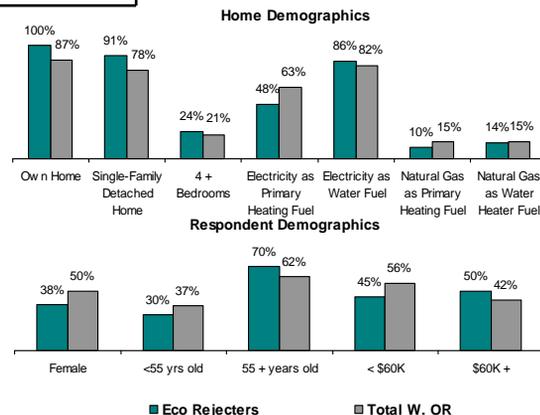
Communication	
BEST Way to Hear About EE Programs (Q22)	
<ul style="list-style-type: none"> <li>Information included with electric bill</li> <li>Newspaper, radio, or television advertising</li> </ul>	
How Learned About EE Programs (Q18)	
<ul style="list-style-type: none"> <li>Word of mouth</li> <li>Newspaper advertisement</li> </ul>	<ul style="list-style-type: none"> <li>Info with electric bill</li> <li>Other promotional mailing</li> </ul>
Local Events Attended in Last 12 Months (Q28)	
<ul style="list-style-type: none"> <li>Home and garden or sportsmen's shows</li> <li>Farmers markets</li> <li>Rodeos or county fairs</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>Operate its business in a completely environmentally friendly manner</li> <li>Do everything possible to supply clean, renewable energy</li> <li>Actively encourage customers to participate in energy/cost-saving programs</li> <li>Provide more online options at utility website</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)	
<ul style="list-style-type: none"> <li>Generally prefer to shop in-store rather than online</li> <li>Environmental impact of day-to-day purchases is not something you worry about all the time</li> </ul>	



# Segment Implications – Eco Rejecters



## Marketing Effort

- Eco Rejecters will be very difficult 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 also among the lowest, making messages that come through the utility potentially dismissed.

## Potential Load Impact

- Although there may be some impact on load, given that all own 3+ bedroom homes and perceive electricity and natural gas bills as being somewhat higher than the average, the unwillingness of Eco Rejecters to recognize a need will make this a herculean challenge.
- Fortunately, this segment represents the smallest portion of the customer base in Western Oregon at 4%.

## Receptivity to Future Conservation Programs

- Interest in the energy conservation programs tested was lower than for any other segment, making this segment an unlikely target for these programs.

## 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.