

# What Are Consumers Thinking About Energy Today?

Presented by:  
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# Acknowledgements

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Research Into Action, Inc
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# Presentation Outline

- Overview
- Question Topics
- Attitudes
- Interest in Products and Services
- Behaviors
- Conclusions

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# Overview

- The first longitudinal, representative, national market study using random-digit dialing and repeated contact attempts
- Multi-client study of consumer attitudes towards energy efficiency, conservation, and energy programs
- First survey in 2002 then 2004, 2006, 2008
- Each survey minimum 800 interviews

# Example Question Topics

- Attitudes about energy conservation and efficiency
- Current energy- savings behaviors
- Motivations for saving energy
- Interest in energy-saving products and services
- ENERGY STAR® awareness
- Opinions about current energy suppliers
- Residence structural and demographic characteristics

# Energy Efficiency Attitudes '02-'08

Energy Efficiency Statement	“Strongly Agree” to “Agree” Response <sup>1</sup> (Strongly Agree=1 to Strongly Disagree=5)			
	2002	2004	2006	2008
It is important to save energy in my home.	96.6%	98.1%	97.9%	97.6%
<b>Saving energy helps the environment.</b>	91.1%	93.0%	<b>94.5%**</b>	92.8%
<b>I am very concerned about the environment.</b>	87.2%	88.6%	<b>90.3%*</b>	89.8%
<b>I look for products that are good for the environment.</b>	80.8%	83.0%	82.6%	<b>85.7%**</b>
Saving energy helps me save money.	93.3%	94.5%	94.7%	95.5%
<b>I am too busy to be concerned about saving energy in my home.</b>	8.0%	<b>11.0%*</b>	8.3%	9.1%
I've already done everything I can to save energy in my home. <sup>2</sup>	—	52.6%	54.4%	49.6%
I sometimes worry whether there is enough money to pay my energy bill.	42.0%	38.2%	43.0%	46.7%

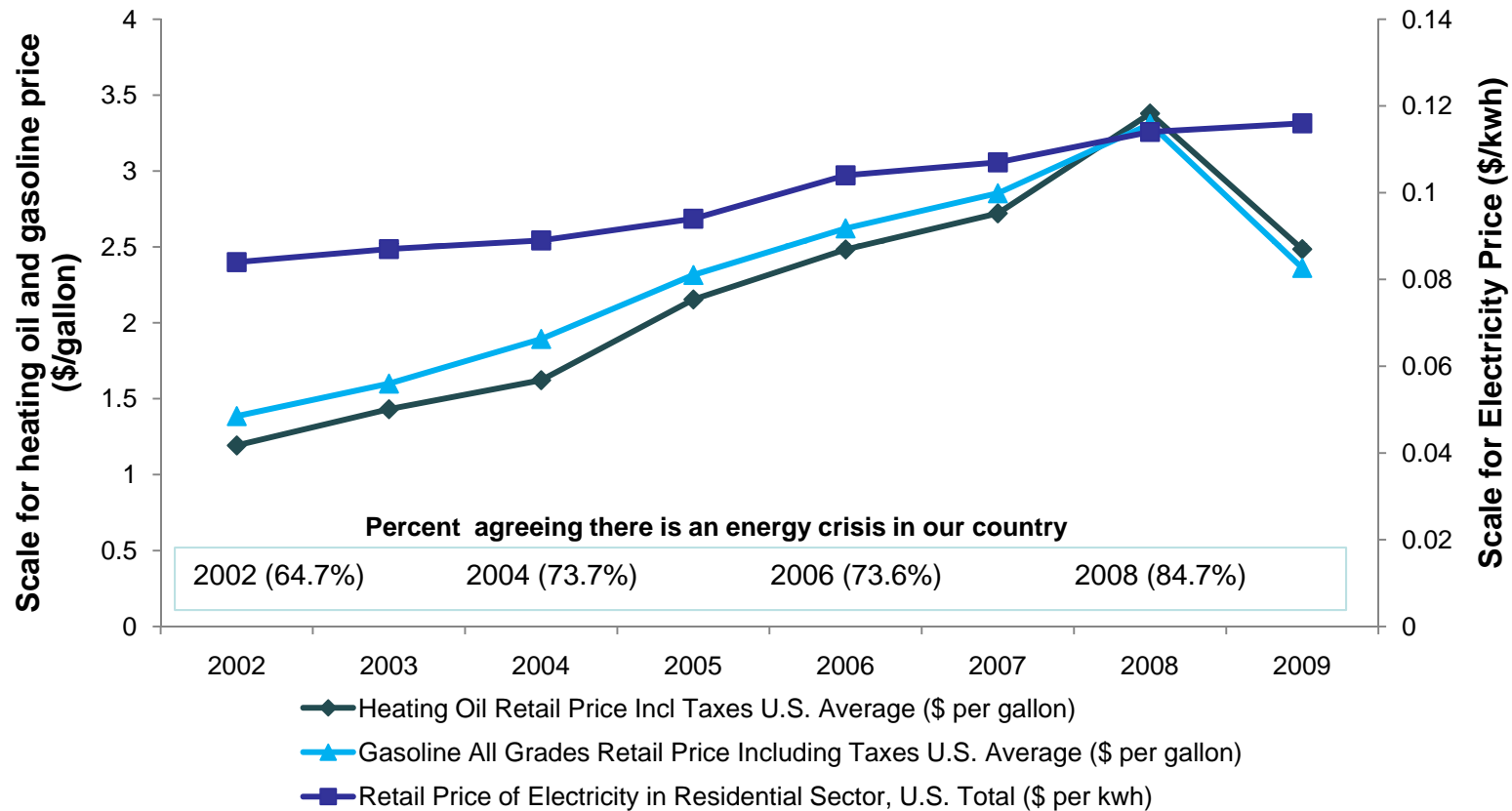
\* p<0.05; \*\* p<0.01

# Finances

- Over 40% of respondents each year are sometimes worried about not having enough money to pay for energy bills
- Income levels for these people are below median national income

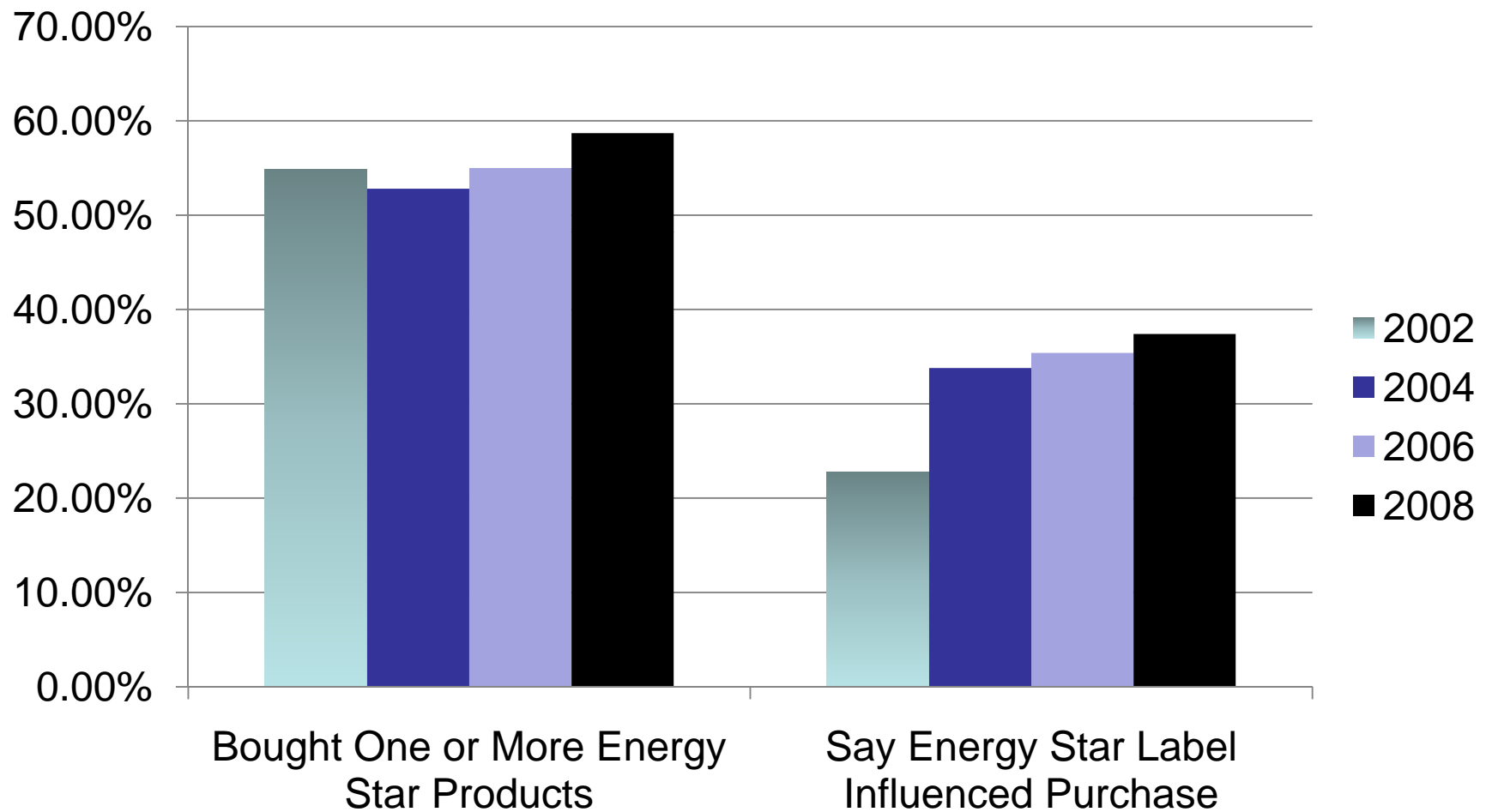
Survey Year	Income of Those Expressing Worry Over Paying Energy Bills	National Median Income
2002	Less than \$40,000	\$42,409
2004	Less than \$50,000	\$44,334
2006	Less than \$60,000	\$48,201
2008	Less than \$40,000	\$50,303

# External Factors





# Interest in ENERGY STAR Products

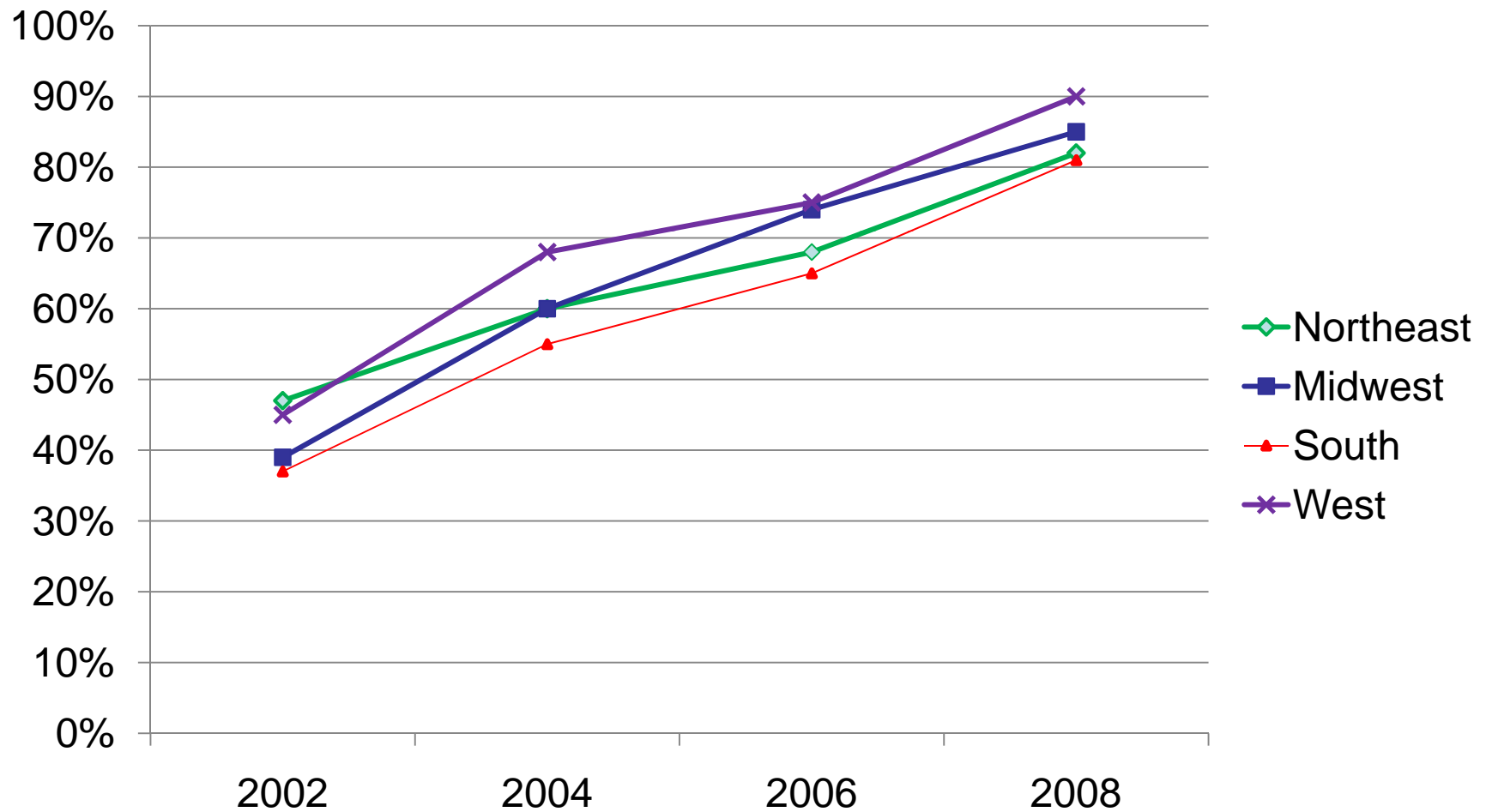


# Energy Efficiency Measure Installations

Energy Efficiency Measure Installed	Percent of Respondents			
	2002	2004	2006	2008
Respondents who installed one or more CFLs in their home	41.3%	42.1%	57.9%**	76.4%**
Respondents who installed a higher efficiency heating or cooling system in their home	42.3%	46.2%	51.9%**	—

\* p<0.05; \*\* p<0.01

# Steady Increase In CFL Ownership



# Frequent Behaviors

- Low-cost/no-cost measures appear to be implemented quite frequently.
- Actions such as performing annual maintenance on heating or cooling systems and adding weather-stripping/caulking are frequently implemented by 65-75% of respondents and show little change from 2002-2008.



# Important Appliance Features

Feature	Percent Ranking Feature As Most Important (Bold responses represent top two each year)			
	2002	2004	2006	2008
Price	<b>21.0%</b>	<b>13.5%**</b>	<b>17.2%</b>	<b>22.0%</b>
Maintenance Cost	<b>18.5%</b>	10.6%**	12.1%**	9.7%**
Durability	—	<b>18.5%</b>	<b>20.3%</b>	<b>16.6%</b>
Energy Use / Energy Efficiency	18.2%	8.4%**	6.3%**	8.8%**
Product Being Better for the Environment	15.9%	2.6%**	3.7%**	5.1%**
Product Features (e.g., color, size, etc.)	9.9%	5.8%*	4.7%**	3.5%**
Warranties	—	4.6%	8.6%*	6.7%

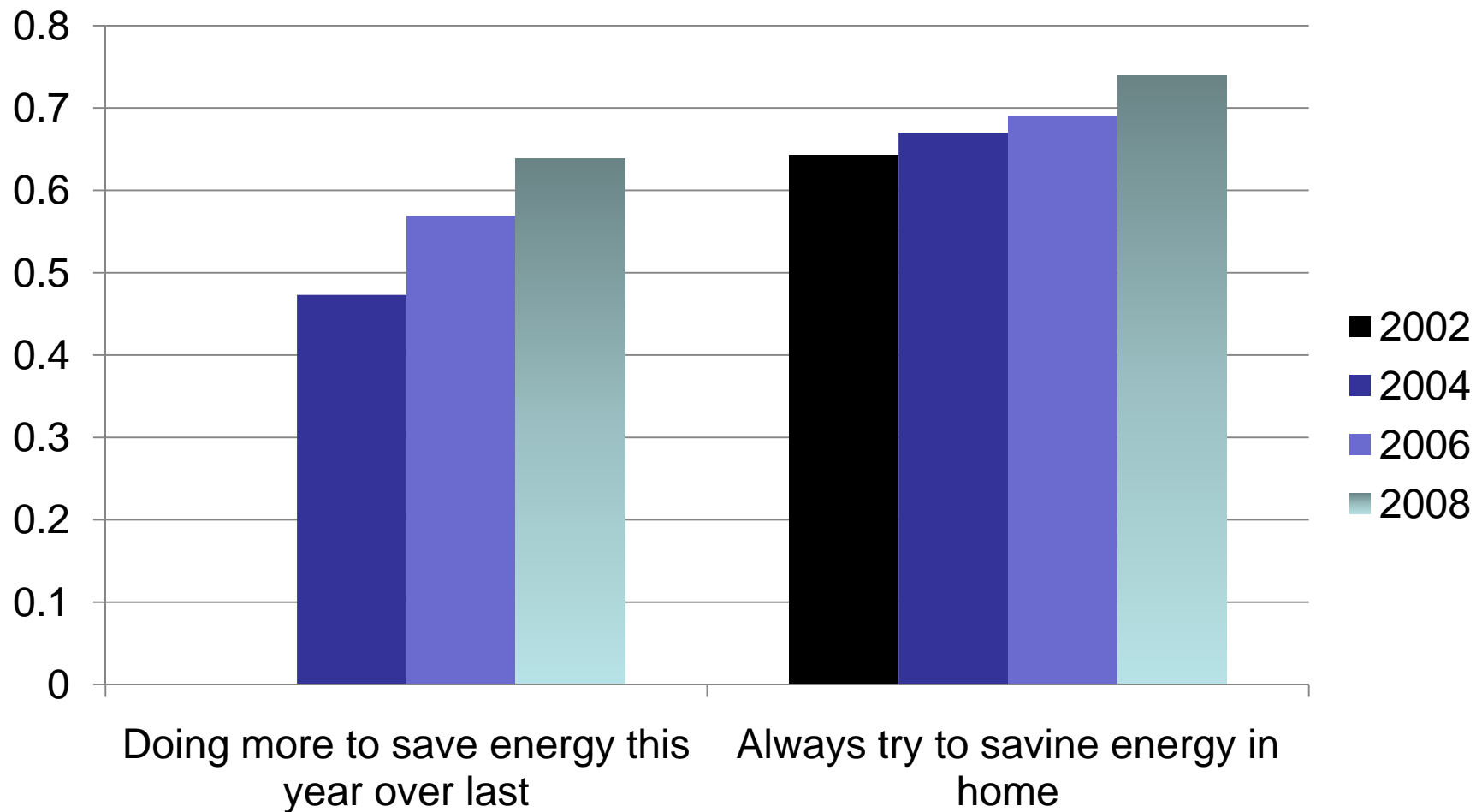
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# What is our Take Away?

- Energy efficiency is lower than durability, price, and maintenance costs.
- Ensuring that energy efficiency is associated with durability and low maintenance costs would likely increase appeal for consumers



# Changing Concern for Energy



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# Conclusions

- Energy efficiency attitudes show strengthening in recent years.
- Many consumers report trying to save energy by taking action in their homes.
- Challenge of moving 50% or more to do more and see opportunities remains.



# Questions?

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# 2010 Prospectus

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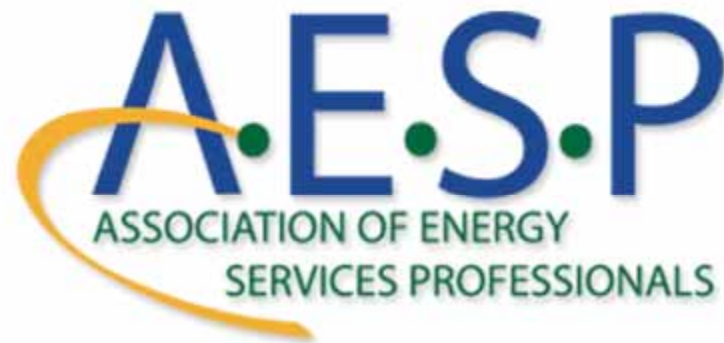
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