2021 National Segmentation Study

NRECA

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NRECA
America's Electric Cooperatives

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Executive Summary

Consumer segmentation is the practice of dividing a customer base into groups of individuals that are similar in specific ways relevant to marketing, such as age, gender, interests and spending habits. The goal of this project is to help co-ops gain a better understanding of their consumer-members based on their attitudes and beliefs related to the climate, renewable energy, energy efficiency, technology and media usage. By segmenting their members related to these attitudes and beliefs, co-ops will be able to better design and communicate programs and services to meet their member needs.

The analysis identified five distinct segments among the members surveyed:

- **Environmental Champion:** These members are actively involved in combating climate change, taking steps to be more energy efficient and working to preserve the planet for future generations. They will get on-board with co-op programs related to energy efficiency and renewables, but they will also push the co-op to do more.

- **Cost-Conscious Supporter:** These members are driven by cost. They are concerned about the environment and energy efficiency, but the co-op programs need to be simple, inexpensive and result in cost savings for them.

- **Complacent Consumer:** These members are busy and don’t have strong opinions one way or the other about climate change, energy efficiency and renewables. They know there are steps they can take but are unlikely to do so.

- **Low-Tech Skeptic:** These members are skeptical of climate change and the need for renewable energy. They don’t keep up on the latest technology. With lower income, they may be interested in co-op programs that save them money.

- **Pro-Tech Skeptic:** These members are also skeptical of climate change and the need for renewable energy. They are the early adopters and influencers of technology. These members can be enticed to engage in co-op programs and services based on the technology as opposed to energy efficiency and potential savings.

Objectives, Methodology and Analysis

Objectives

The main objective of this study is to explore members' views on a wide range of topics likely to impact their level of interest in various energy efficiency, conservation and renewable energy programs including, but not limited to:

- Their perception of/satisfaction with their co-op.
- The degree to which they see the energy situation as critical.
- Their level of concern regarding the environment.
- How much their electric bill impacts their monthly budget.
- How much room for improvement they feel they have for keeping their energy use in check.
- Their thoughts about how the cost of electricity is likely to change in the future.
- Their participation and interest in various energy efficiency programs and services.
- The eagerness with which they embrace new technology.

The results of the survey provide national insight on member attitudes and beliefs and were used to create consumer environmental segments based on those attitudes and beliefs.

Methodology

For this study, NRECA sought a representative sampling of co-ops, balancing geography, size and type of co-op. Co-ops across the network were invited to participate, with 19 co-ops ultimately taking part in the study.

Data were collected through online surveying. Data collection began on February 8, 2021, and ran through February 25, 2021. Email invitations were sent to a random sample of 55,468 members for whom their co-op has an e-mail address, with 3,118 returned as being undeliverable. A total of 7,474 surveys were completed, resulting in an overall response rate of 14%. Survey respondents are weighted by connect date to match the overall member distribution by service tenure. In order to avoid bias in the national survey results, they are also weighted so there are no more than 300 total respondents from each co-op. This ensures that no one co-op is represented more than another co-op.

The margin of error at the 95% confidence level for the weighted sample of 5,700 is approximately plus or minus 1.3 percentage point. This means that a result of 50% in the survey may range between 48.7% and 51.3% in an infinite number of residential samples this size.

Analysis

Differences between member segments, such as differences by age or service tenure, are indicated and characterized as being either statistically significant or not. When the term "significant" is used, this refers to the certainty of a difference, not the magnitude or size of the difference. Significance is measured at the 95% confidence level, meaning that at least 95% of the time, using the same sampling procedure, this difference will occur; the difference is likely not a matter of chance.

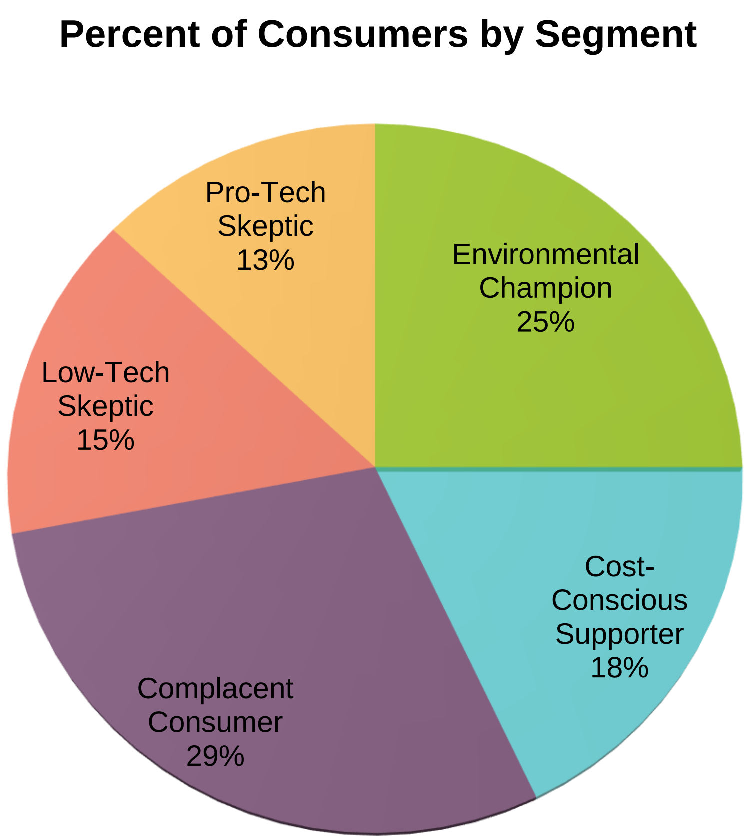
When interpreting the mean ratings in this report, on a 10-point scale a mean of 9 or above should be considered "excellent" and a mean between 8 and 8.9 is considered "good." Means below 8 may be cause for concern and those below 7.5 indicate a need for improvement.

Segmentation

The overarching reason for this survey was to update the segmentation study conducted in 2013. The five segments found in the previous study included Actively Green, Conveniently Green, Indifferent Techies, Indifferent Analogs and Environmental Skeptics. Five segments were also identified in the current study and are named Environmental Champion, Cost-Conscious Supporter, Complacent Consumer, Low-Tech Skeptic and Pro-Tech Skeptic.

Compared to the 2013 study, the Environmental Champion and Cost-Conscious Supporter segments are similar to the Actively Green and Convenient Green segments. The Complacent Consumer segment is similar to the Indifferent Techies and Indifferent Analog segments, but without the clear tech difference. What has changed the most is the Skeptics have increased from 15% to 28% and is now the group that has a clear tech group, therefore dividing the Skeptics into Low-Tech and Pro-Tech.

Those segments and the proportion of consumers in each are shown in the graph below.



Environmental Champion

25% of Consumers

Climate change is a serious problem and everyone must do their part to combat it. We need to do all we can to help the planet now, for the benefit of future generations. This includes actively measuring energy use, taking measures to be more energy efficient and using renewable sources and electric vehicles. I follow and strongly support all my cooperative does to encourage energy efficiency and use renewable energy sources.

Climate Change and Renewables

This segment is most likely to be aware of solar and wind power in their energy mix and willing to pay $10 or more extra per month to get electricity from renewables. In general, this segment is most likely to agree with statements regarding:

- Climate change/global warming.
- Renewable energy.
- Environment/air pollution.
- Electric vehicles/hybrids.
- Energy independence.

They are least likely to agree that:

- The threat of climate change is overstated.
- Renewable energy sources are too expensive.
- Climate change is a natural cycle.

Energy Efficiency

This segment is the most likely to:

- Feel their appliances waste too much energy.
- Switch items they regularly use from being powered by fossil fuels to electricity.
- Have taken steps to conserve energy at their home (and have spent the most on energy saving measures) and plan to take steps in the upcoming year.

This segment is the most likely to agree they are:

- Motivated to use less electricity to combat climate change/reduce air pollution.
- Willing to make major changes to their lifestyle.

They are less likely to agree that:

- Adjusting the thermostat will just cost more.
- They have already made the improvements they can.
- They don’t have time to monitor electric use.

Environmental Champion (continued)

Cost
This segment is more likely to conserve for environmental reasons, with cost being a secondary motivator. They are the least likely to feel their monthly bill is a serious issue or to have challenges paying it on time.

Lifestyle
This segment is less likely to feel they get too much information and don’t have enough time to get everything done.

Technology
This segment is highly likely to take advantage of technology. They are most likely to:

- Consider an EV or plug-in hybrid.
- Feel technology gives people control over their daily lives.
- Do business on the internet.

They are least likely to feel technology always fails at the worst possible time.

Co-op Membership

- Second shortest tenure, second lowest percent of members served for 20 years or more.
- Most likely to feel like a member-owner.
- Second highest satisfaction.
- High evaluations on most attributes, lower for operating with concern for the environment and helping members to be more efficient in their use of electricity.

Communication

- Most likely segment to use most digital methods (email, text, YouTube, Zoom, Instagram, Twitter, Skype).
- Most likely segment to rely on multiple sources of information (i.e. internet, newspapers, news apps on their mobile phone, co-op newsletter and/or magazines) to stay informed on local news/events.
- Most likely segment to prefer email for communication about co-op programs, least likely to prefer automated phone calls or bill stuffers.

See the demographics section for additional detailed information about the demographics of each segment.

Cost-Conscious Supporter

18% of Consumers

In today's economy, I am always looking for ways to save money. That is why I am highly motivated to conserve. However, I am only willing to take steps that are convenient and inexpensive. Although I am highly satisfied with my co-op, I sometimes run into trouble paying my electric bill on time.

Climate Change and Renewables

This segment is least aware of many of the power sources in their energy mix. They are likely to agree with statements regarding:

- Climate change/global warming.
- Renewable energy.
- Environment/air pollution.
- Electric vehicles.
- Energy independence.

They also somewhat agree that:

- The threat of climate change is overstated.
- Renewable energy sources are too expensive.
- Climate change is a natural cycle out of our control.

Energy Efficiency

This segment is more likely to conserve for cost savings than for environmental factors. They are likely to have weatherized or had an energy audit in the last year, as well as planning to take steps to conserve in the next year. They are likely to feel their appliances waste too much energy, switch items from being powered by fossil fuels to electricity and have taken other steps to conserve energy at their home.

They are the most likely to be motivated to use less electricity to:

- Avoid the need to build new power plants.
- Help make America energy independent.
- Save money on their electric bill.

They are also the most likely to agree that:

- Adjusting the thermostat up and down will cost more.
- They have made major changes to their lifestyle.
- They have made the most improvements they can.
- Most people use more electricity than they need.
- They don't have time to constantly monitor use.
- They will replace appliances when they break.

Cost-Conscious Supporter (continued)

Cost

This segment is most likely to feel their electric bill is an extremely serious issue and second highest percentage of those who have run into challenges paying their bill on time. They are the most likely to agree on all five of the cost-related statements.

Lifestyle

This segment is most likely to agree that in today's economy, they are always looking for ways to save money and that they never have enough time in the day. They are also most likely to say they are actively involved in civic and local affairs. When making a purchase, they rely on the advice of others and prefer to shop local.

Technology

While this group likes doing business on the internet, they do have privacy concerns and are more likely to feel the human touch is important. They also feel that they deal with too many gadgets. Although they are not someone that others rely on for advice about new technologies, they are likely to write reviews for products and services on the internet.

Co-op Membership

- Longest average tenure, highest percent of members served 20+ years.
- Second highest for member identity, but also the segment most likely to be unsure.
- Highest satisfaction.
- Highest evaluations on all attributes.
- Highest evaluations on co-op promoting energy efficiency and renewable energy.

Communication

All use email and most use text or Facebook and are most likely to rely on TV to stay informed.

Complacent Consumer

29% of Consumers

I do not have a strong opinion about climate change, renewable energy or energy efficiency. Although I know there are things my family and I can do to be more energy efficient, we have no plans to do so. Showing me that I can save money on my electric bills could motivate me to take some simple steps as I sometimes run into difficulty paying my bill on time.

Climate Change and Renewables

This segment does not have a strong opinion on climate change, renewable energy or the environment. They are middle-of-the-road, usually ranking third out of the five segments. Their highest agreement is for:

- We need to do all we can to help the planet now, for the benefit of future generations.

Their lowest agreement is for:

- I think hybrid/electric vehicles are a good choice because it is environmentally conscious to drive them.

Energy Efficiency

This segment does not feel strongly either way about energy efficiency. They are least likely to have taken many of the steps to conserve energy and spent the least on energy saving measures.

They are the least likely segment to agree that:

- I think I have made most of the improvements I can to make my home energy efficient.

Their highest agreement is for:

- I will replace my appliances with more energy efficient models, but not until they break.

Their lowest agreement is for:

- Avoiding the need to build power plants motivates me to use less electricity.

Cost

Forty-two percent feel their electric bill is an extremely or somewhat serious issue and this segment is most likely to have run into challenges paying on time. They are more likely to conserve for cost savings than for environmental factors. They are the second least likely to agree with three of the five cost-related statements. They are the least likely to agree that:

- The cost of power is going to increase much faster than the rate of inflation.
- My electricity bills are low enough that I don’t worry much about energy efficiency.

Complacent Consumer (continued)

Lifestyle
They are the segment least likely to agree that:
- I am actively involved in civic and local affairs.
- A local company will provide better service than one that does business nationally.

They are the segment with the second lowest level of agreement for:
- I often write reviews for products and services on the internet.
- I am always looking for ways to save money.

Technology
This segment is somewhat Low-Tech. They are not likely to agree that:
- They will consider an electric vehicle or hybrid.
- They are the person that friends and family rely on for advice about new technologies.
- They are usually among the first to adopt new technology.

They are somewhat likely to agree that:
- They prefer the human touch when doing business.
- They have concerns about the privacy of personal information.

Co-op Membership
- Second shortest tenure with the co-op.
- Second most likely to feel like a customer.
- Satisfaction somewhat lower (second lowest).
- Lowest or second lowest evaluations on all attributes.

Communication
- All use email and almost all use text.
- Most likely segment to use Facebook, SnapChat and TikTok.
- Most rely on TV and the internet to stay informed.
- Most likely segment to rely on word of mouth and social media to stay informed.

Low-Tech Skeptic

15% of Consumers

I feel strongly that the threat of climate change is overstated and renewable energy sources are too expensive. Although I am not happy about my electric bills, I use about as much electricity as the average household and do not see a need to be more energy efficient. I prefer to shop local and avoid shopping online.

Climate Change and Renewables

This segment is the least aware of solar and wind power sources in the mix and are highly unlikely to pay more for renewable sources. They are the least likely to agree that:

- Hybrid/electric vehicles are a good choice.
- Using more green energy will eventually cause the cost of power to drop.

They are the most likely to agree that:

- The threat of climate change is overstated.
- Renewable energy sources are too expensive.
- Climate change is a natural cycle out of our control.

Energy Efficiency

This segment is the least likely to switch outdoor or household appliances and vehicles they regularly use from being powered by fossil fuels to electricity. They are less likely than most other segments to:

- Feel their appliances waste too much energy.
- Have taken steps to conserve energy at their home or plan to take steps in the future.

In general, this segment is the second least likely to agree with most statements regarding energy efficiency, especially:

- Combating global warming and climate change motivates me to use less electricity.
- Avoiding the need to build new power plants motivates me to use less electricity.
- Reducing air pollution motivates me to use less electricity.
- Going forward, I am willing to make major changes in my lifestyle to conserve electricity.

Cost

Most likely segment to feel their electric bill is an extremely or somewhat serious issue, but only 12% have run into challenges paying on time. They tend to agree the cost of power is going to increase much faster than the rate of inflation.

Lifestyle

The most likely to agree that a local company will provide better service and they get too much information sent to them. They are least likely to write reviews for products and services on the internet.

Low-Tech Skeptic (continued)

Technology

This segment is very Low-Tech. They are the most likely to agree that:

- I deal with too many gadgets.
- Technology always seems to fail at the worst time.
- The human touch is very important when doing business.
- I have serious concerns about the privacy of my personal information.

They are the least likely to agree that:

- I will consider an electric vehicle or hybrid.
- Technology gives people control over their lives.
- I am usually among the first to adopt technology.
- I like doing business on the internet.
- My friends or family rely on me for advice about new technologies.

Co-op Membership

- Second longest tenure, second highest percent served 20+ years.
- Average level of member identity.
- Average satisfaction levels.
- Average evaluations on all attributes.

Communication

- All use email but are least likely to use other types of electronic/social media.
- Most likely to rely on radio and least likely to rely on internet, news apps and social media.
- Most likely to have never visited the co-op website.

Pro-Tech Skeptic

13% of Consumers

I feel strongly that my electric cooperative should stick to fossil fuels versus transitioning to renewable energy sources. Although my electric bills are higher than average, I have no trouble paying them and do not need to be more energy efficient. I am an early adopter of new technologies and the person that friends and family rely on for advice about technology.

Climate Change and Renewables

This segment is most likely to be aware of coal, natural gas, hydroelectric and nuclear power in their energy mix. They are the most likely to say they would pay nothing more for renewable sources.

In general, this segment is the least likely to agree with statements regarding:

- Climate change/global warming.
- Renewable energy.
- Environment/air pollution.

They are the second most likely to agree that:

- The threat of climate change is overstated.
- Renewable energy sources are too expensive.
- Climate change is a natural cycle out of our control.

Energy Efficiency

This segment is the least likely to feel their appliances waste too much energy. They are less likely than most other segments to:

- Switch items they regularly use from being powered by fossil fuels to electricity.
- Have taken steps to conserve energy at their home or plan to take steps in the future.

In general, this segment is the least likely to agree with most statements regarding energy efficiency, especially:

- Combating global warming and climate change motivates me to use less electricity.
- Avoiding the need to build new power plants motivates me to use less electricity.
- Reducing air pollution motivates me to use less electricity.
- Going forward, I am willing to make major changes in my lifestyle to conserve electricity.

Cost

This segment is not likely to feel their monthly bill is a serious issue or to have challenges paying on time. They are the second least likely to agree with two of the five cost-related statements. They are the least likely to agree that:

- It's wise to invest in energy efficiency now.
- Anything my electric cooperative can do to save money will lower electric bills for me.
- Electric rates are reasonable.

Pro-Tech Skeptic (continued)

Lifestyle
This segment is the least likely to agree that they:
- Are always looking for ways to save money.
- Get too much information sent to them.
- Rely on the advice of others when making a purchase.
- Never have enough time to get things done.

Technology
This segment is highly likely to take advantage of technology. They are the most likely to agree that:
- They are among the first in their circle to adopt technology.
- Friends rely on them for advice about new technologies.

They are the least likely to agree that:
- I deal with way too many gadgets.
- The human touch is very important when doing business.
- I have serious concerns about the privacy of my personal information.

Co-op Membership
- Shortest tenure, highest percent served 10 years or less.
- Most likely to feel like a customer.
- Lowest satisfaction.
- Lowest or second lowest evaluations on all attributes.
- Lowest evaluations on co-op promoting energy efficiency and renewable energy.

Communication
- More likely than most of the other segments to use most digital methods (email, text, YouTube, Zoom, social media, etc.).
- Typically rely on the internet to stay informed; least likely to rely on TV or newspaper.
- Most likely segment to visit their co-op’s website, usually to pay bills or find outage information.

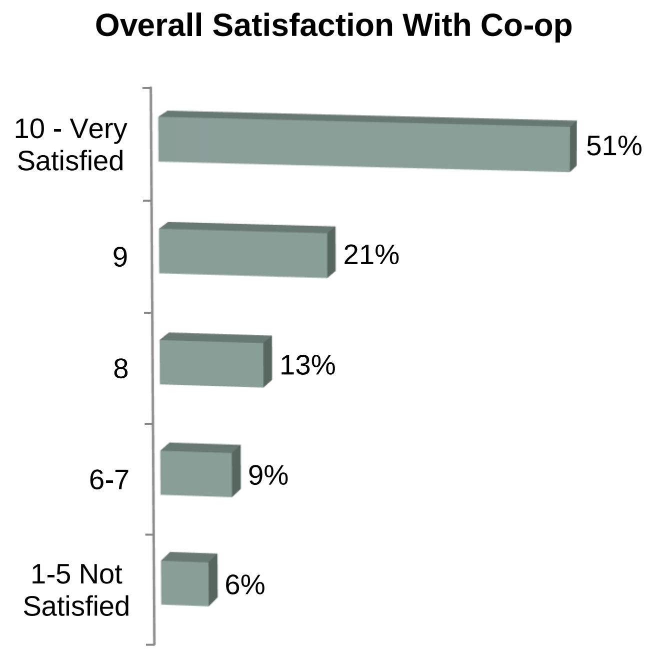
Survey Findings

Electric Cooperative Evaluation

Overall satisfaction among the 19 participating co-ops is very good. The mean overall satisfaction rating is 8.86 and 72% give the top ratings of "9" or "10."

Cost-Conscious Supporters give the highest satisfaction ratings, followed by Environmental Champions.

Pro-Tech Skeptics are least satisfied with their co-op.



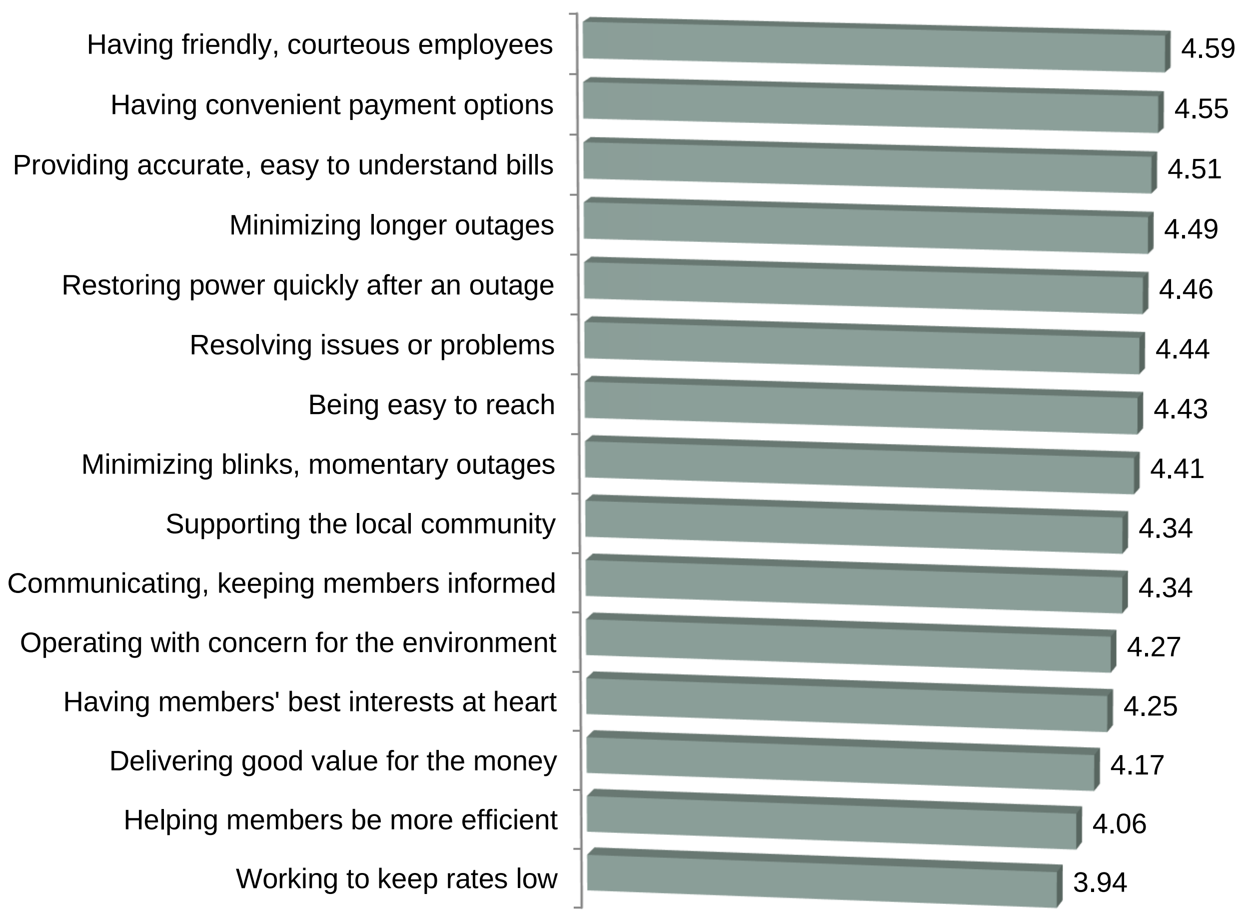
	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Mean satisfaction	8.92	**9.21 (H)**	8.71	8.83	*8.60 (L)*
% give "10" rating	51%	**63% (H)**	46%	51%	*45% (L)*

Members were asked to evaluate 15 performance quality attributes related to member service, electric service, communication, billing and cost. On all but one of the attributes measured, the mean ratings are above 4.00, a "good" rating on a 5-point scale.

Additionally, mean ratings for four attributes are approximately 4.50 or higher which is considered excellent. These include**:**

- Having friendly, courteous employees (4.59).
- Having convenient payment options (4.55).
- Providing accurate and easy to understand bills (4.51).
- Keeping longer outages to a minimum (4.49).

Conversely, the attribute on which co-ops is rated least well is *working to keep rates low* (70% rating "4" or "5"). Attributes regarding cost are often rated lower in cooperative satisfaction research and ratings often fall below the "good" threshold of 4.00. However, with a mean rating right below that level (3.94), this is not of too much concern.

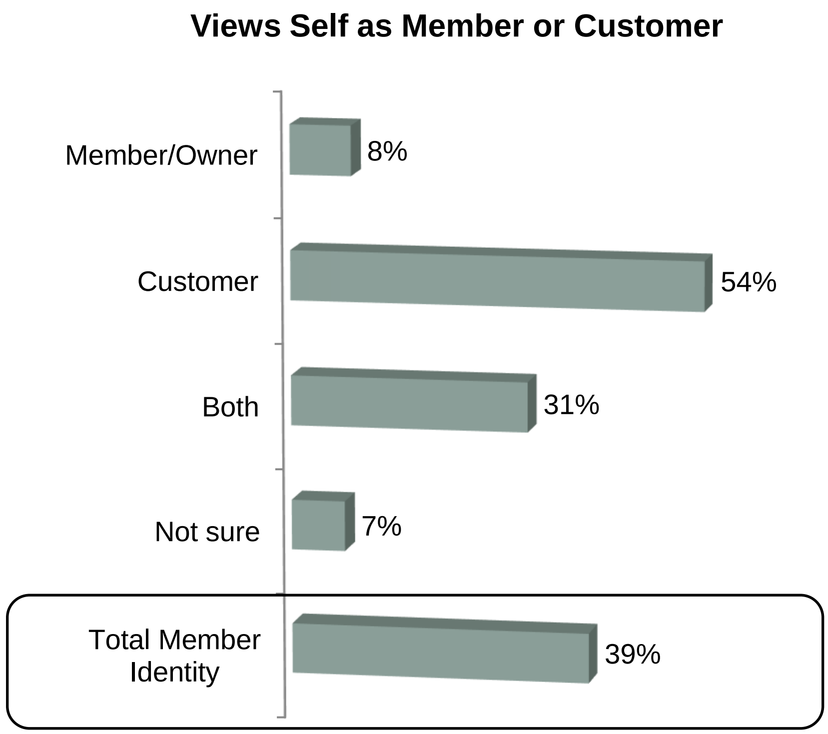


Members who fall into the Cost-Conscious Supporter segment give significantly higher ratings on all attributes compared to those in the other four segments.

	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Having friendly, courteous employees	4.61	**4.75 (H)**	*4.47 (L)*	4.61	4.55
Having convenient payment options	4.60	**4.70 (H)**	*4.45 (L)*	4.52	4.50
Providing accurate and easy to under-stand bills	4.55	**4.69 (H)**	*4.39 (L)*	4.52	4.43
Keeping longer power outages to a minimum	4.53	**4.65 (H)**	*4.39 (L)*	4.50	4.43
Restoring power quickly after an outage	4.49	**4.62 (H)**	*4.36 (L)*	4.48	4.38
Resolving issues or problems	4.47	**4.61 (H)**	*4.32 (L)*	4.46	4.35
Being easy to reach	4.48	**4.60 (H)**	*4.33 (L)*	4.41	4.38
Keeping blinks, momentary outages to a minimum	4.44	**4.58 (H)**	4.32	4.39	*4.31 (L)*
Supporting the local community	4.34	**4.58 (H)**	*4.24 (L)*	4.35	*4.24 (L)*
Communicating with members, keeping them informed	4.40	**4.57 (H)**	*4.20 (L)*	4.32	4.26
Operating with concern for the environment	*4.11 (L)*	**4.58 (H)**	4.17	4.36	4.25
Having members' best interests at heart	4.27	**4.52 (H)**	4.13	4.25	*4.10 (L)*
Delivering good value for the money	4.20	**4.44 (H)**	4.05	4.17	*4.01 (L)*
Helping members to be more efficient in their use of electricity	4.04	**4.40 (H)**	3.92	4.06	*3.90 (L)*
Working to keep rates low	3.99	**4.27 (H)**	3.82	3.92	*3.71 (L)*

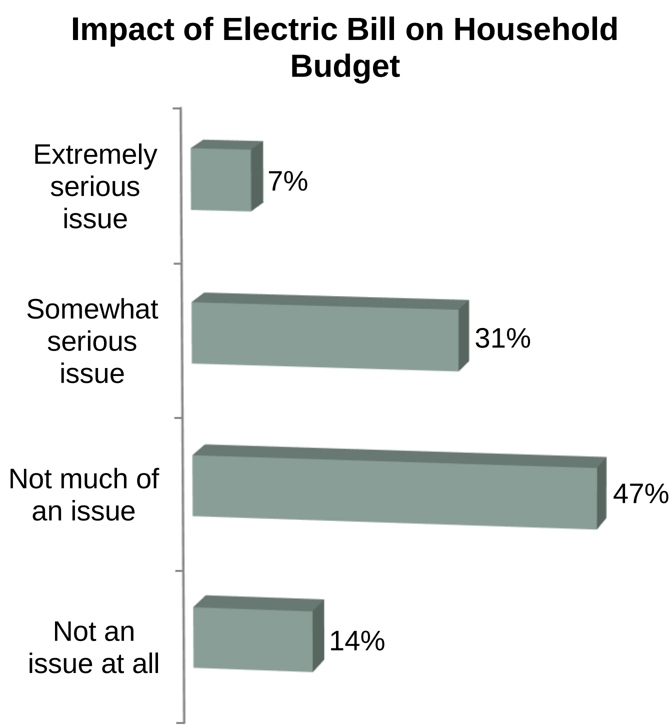
Thirty-nine percent view themselves as a member of the co-op as opposed to feeling like a customer. That is, they view themselves as a member/owner (8%) or both a member/owner and a customer (31%).

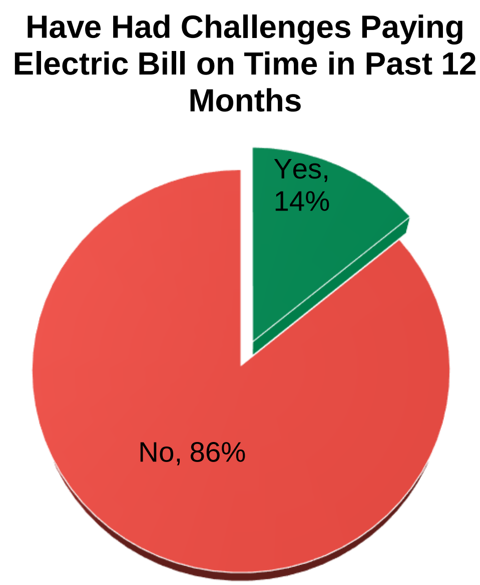
Members in the Environmental Champion, Cost-Conscious Supporter and Low-Tech Skeptic groups have a higher proportion of member identity than do those in the Pro-Tech Skeptic and Complacent Consumer groups.



	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Total member identity	**45% (H)**	43%	*33% (L)*	40%	36%

Most members indicate their bill is not much of an issue or is not an issue at all for their household budget. However, approximately four in ten say it is a somewhat or extremely serious issue. Additionally, 14% say they have had challenges paying their electric bill on time in the past year. Given the level of financial hardship the COVID-19 pandemic has created across the country, it is likely that this would have been a lower number if this survey had been conducted prior to March 2020.



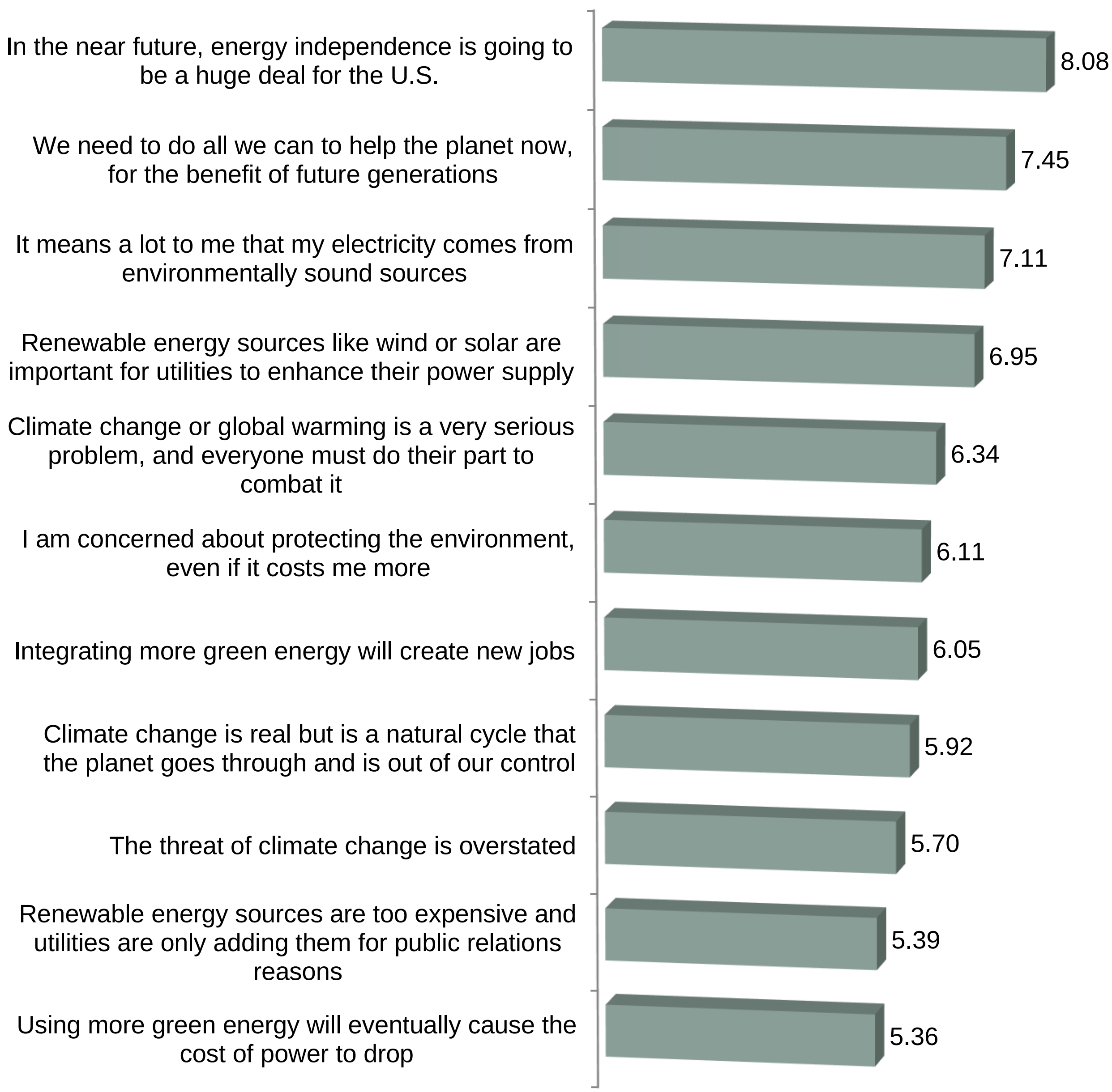


Cost-Conscious Supporters, Complacent Consumers and Low-Tech Skeptics are most likely to say their electric bill is a serious issue and that they have run into challenges paying their electric bill on time in the past year.

	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Electric bill is an issue	*31% (L)*	41%	41%	**43% (H)**	37%
Have run into challenges paying electric bill	*10% (L)*	16%	**18% (H)**	12%	*10% (L)*

Electric Power and the Environment

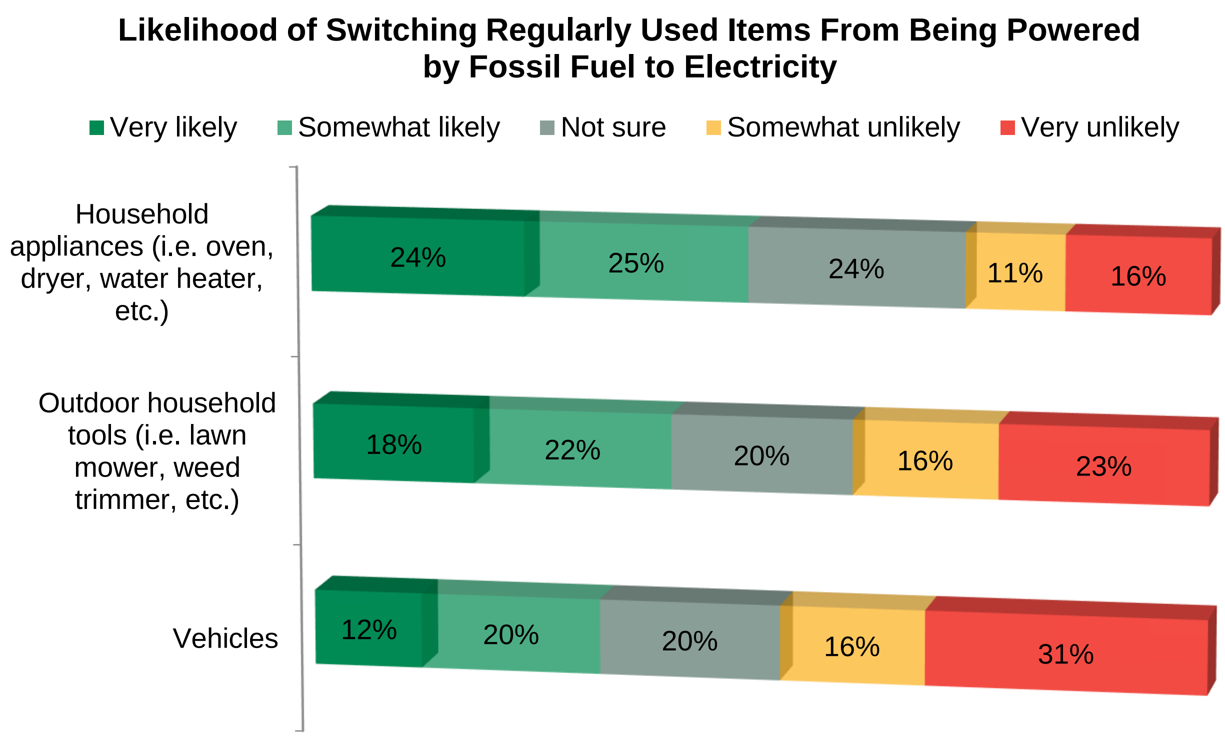
In this area, respondents were asked to give their level of agreement on 11 statements regarding electric power and the environment. Agreement is highest for the statement *in the near future, energy independence is going to be a huge deal for the U.S.* Agreement is lowest for the statements *using more green energy will eventually cause the cost of power to drop* and *renewable energy sources are too expensive and utilities are only adding them for public relations reasons*.



Not surprisingly, agreement for most of these statements is highest among the Environmental Champion segment. However, the Low-Tech Skeptic group is most likely to agree that climate change is out of our control, the threat of climate change is overstated and renewable energy sources are too expensive.

	Environ-mental Champion	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
Energy independence is going to be a huge deal for the US	**8.81 (H)**	8.71	*7.16 (L)*	8.28	7.65
We need to do all we can to help the planet now for the benefit of future generations	**9.73 (H)**	8.86	7.33	5.13	*4.31 (L)*
It means a lot to me that my electricity comes from environ-mentally sound sources	**9.36 (H)**	8.61	6.75	5.13	*3.98 (L)*
Renewable energy sources are important for utilities to enhance their power supply	**9.57 (H)**	8.42	6.91	3.91	*3.71 (L)*
Climate change is a very serious problem and everyone must do their part to combat it	**9.65 (H)**	7.69	6.35	2.69	*2.61 (L)*
I am concerned about protecting the environment, even if it costs more	**8.97 (H)**	7.18	5.71	3.56	*3.22 (L)*
Integrating more green energy will create new jobs	**9.02 (H)**	7.33	5.87	2.89	*2.88 (L)*
Climate change is real but is a natural cycle out of our control	*2.44 (L)*	7.58	5.75	**8.36 (H)**	7.59
The threat of climate change is overstated	*1.46 (L)*	6.84	5.31	**9.20 (H)**	8.77
Renewable energy sources are too expensive	*2.23 (L)*	6.48	5.06	**7.92 (H)**	7.51
Using more green energy will cause the cost of power to drop	**7.96 (H)**	6.89	5.31	*2.15 (L)*	2.28

Members are most likely to switch their household appliances from being fossil fuel-powered to electric-powered. This is followed by outdoor household tools (such as lawn mowers and weed trimmers) and vehicles.

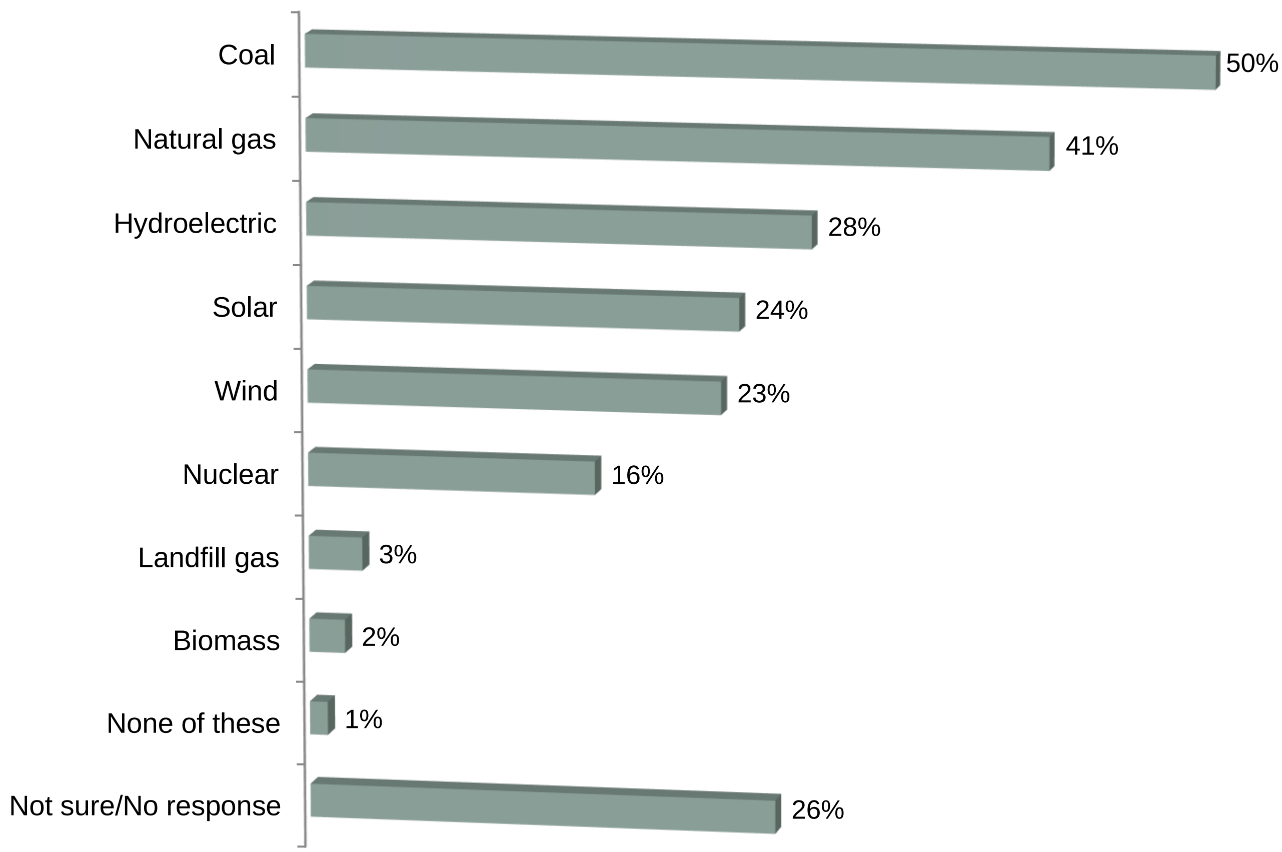


Environmental Champions are by far most likely to switch these items from being powered by fossil fuels to being powered by electricity.

	Environ-mental Champion	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
Household appliances	**79% (H)**	55%	44%	23%	*22% (L)*
Outdoor household tools	**74% (H)**	48%	33%	*13% (L)*	14%
Vehicles	**74% (H)**	32%	21%	*5% (L)*	8%

Members most often perceive coal as a power source used by their co-op to get electric power, followed by natural gas. One-quarter were not able to answer the question or indicated they are not sure.

Power Sources Co-op Uses to Get Electric Power

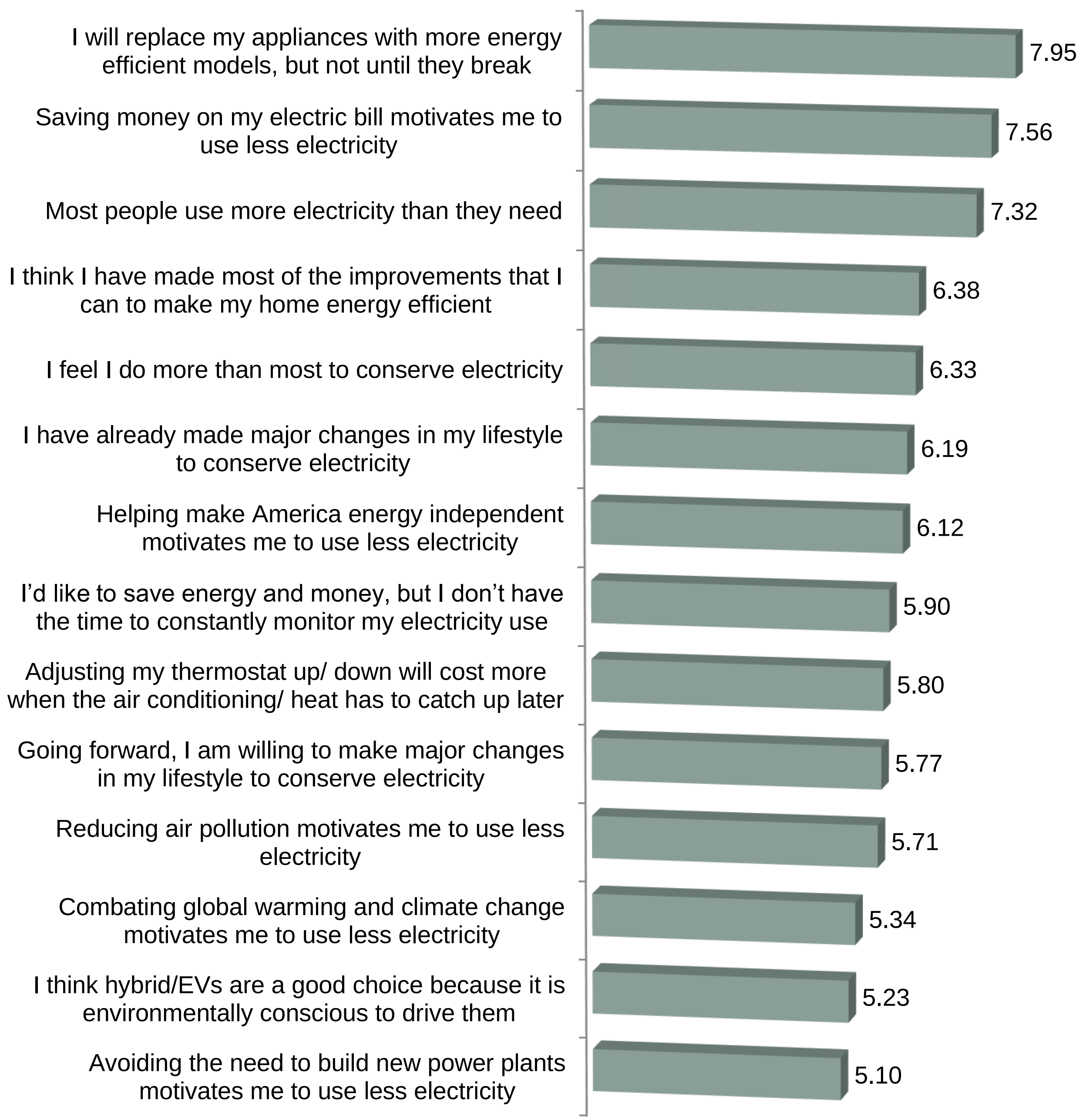


While Pro-Tech Skeptics are most likely to be aware of what power sources are included in their overall power mix, Environmental Champions are most likely to be aware that renewable energy is part of their mix. Cost-Conscious Supporters and Complacent Consumers are least likely to be aware of what is in their power mix.

	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Aware of what goes into power mix	76%	*62% (L)*	65%	82%	**85% (H)**
Aware renewables are part of power mix	**26% (H)**	*11% (L)*	13%	16%	21%

Energy Efficiency and Renewable Energy

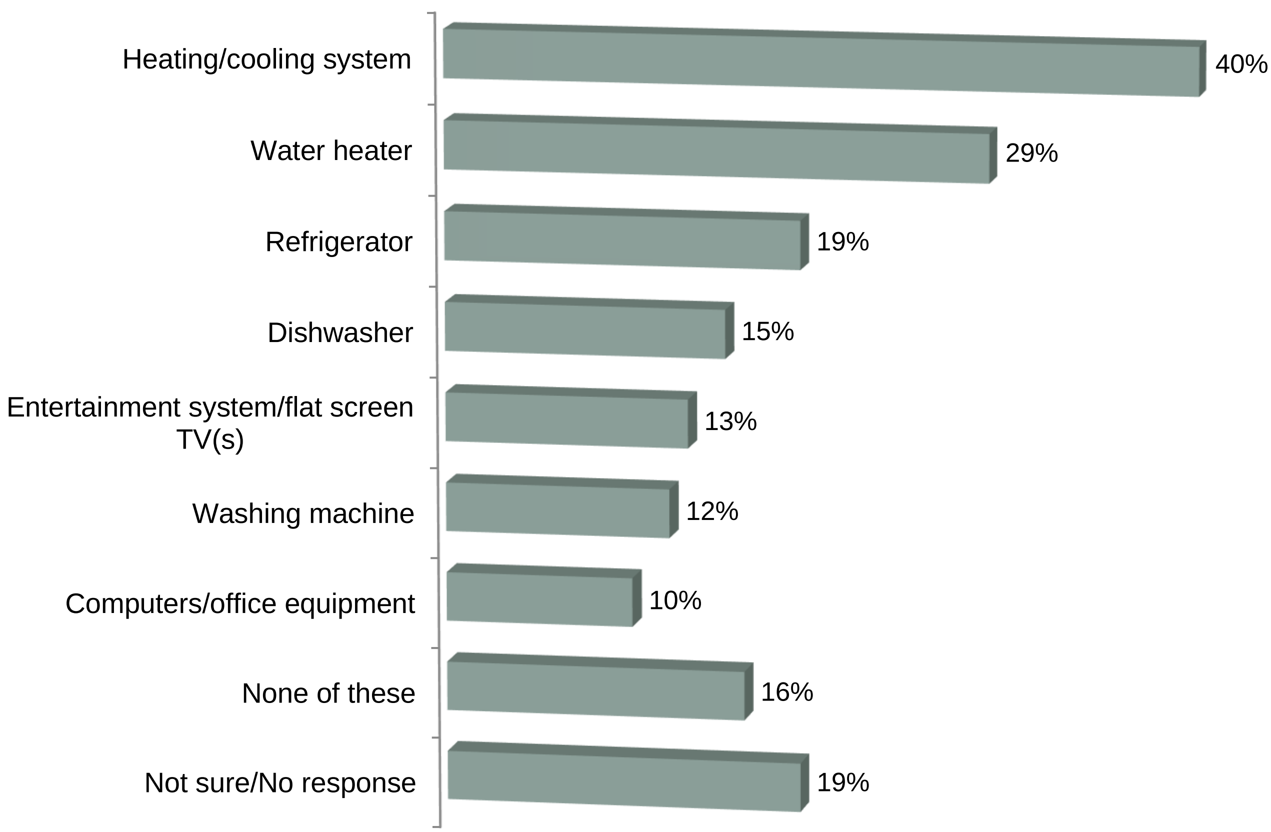
In this area, respondents were asked to give their level of agreement on 14 statements regarding energy efficiency and renewable energy. Agreement is highest for the statement *I will replace my appliances with more energy efficient models, but not until they break.* Agreement is lowest for the statement *avoiding the need to build new power plants motivates me to use less electricity*.



	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
I will replace appliances with more energy efficient models but not until they break	7.85	**8.67 (H)**	*7.52 (L)*	8.38	7.58
Saving money on my electric bill motivates me to use less electricity	8.06	**8.88 (H)**	7.01	7.30	*6.35 (L)*
Most people use more electricity than they need	8.39	**8.44 (H)**	6.90	6.58	*5.55 (L)*
I think I have made most of the improvements that I can to make my home more energy efficient	6.07	**7.75 (H)**	*5.60 (L)*	6.89	6.20
I feel I do more than most to conserve electricity	7.02	**7.72 (H)**	5.45	6.20	*5.18 (L)*
I have already made major changes in my lifestyle to conserve electricity	7.06	**7.80 (H)**	5.42	5.76	*4.55 (L)*
Helping make America energy independent motivates me to use less electricity	7.47	**7.89 (H)**	5.31	5.14	*4.11 (L)*
I'd like to save energy & money, but don't have time to monitor use	*5.29 (L)*	**7.01 (H)**	5.88	5.91	5.51
Adjusting thermostat up/ down will just cost more when the AC or heat has to catch up later	*4.92 (L)*	**7.62 (H)**	5.61	6.17	4.93
Going forward, I am willing to make major changes in my lifestyle to conserve	**7.76 (H)**	7.57	5.27	3.81	*2.98 (L)*
Reducing air pollution motivates me to use less electricity	**7.99 (H)**	7.46	5.19	3.42	*2.88 (L)*
Combating global warming motivates me to use less electricity	**8.35 (H)**	7.00	4.89	2.25	*2.02 (L)*
I think hybrid/electric vehicles are a good choice	**8.25 (H)**	6.21	4.84	*2.29 (L)*	2.54
Avoiding the need to build new power plants motivates me to use less electricity	6.86	**6.89 (H)**	4.68	3.13	*2.57 (L)*

Heating/cooling systems are most often named as being an appliance that wastes too much energy in people's homes. This is followed by water heaters and refrigerators. Respondents are least likely to mention their computers/office equipment as appliances in their home that waste energy. Sixteen percent indicate that none of their appliances waste energy while nearly one-fifth were not sure or were not able to answer the question.

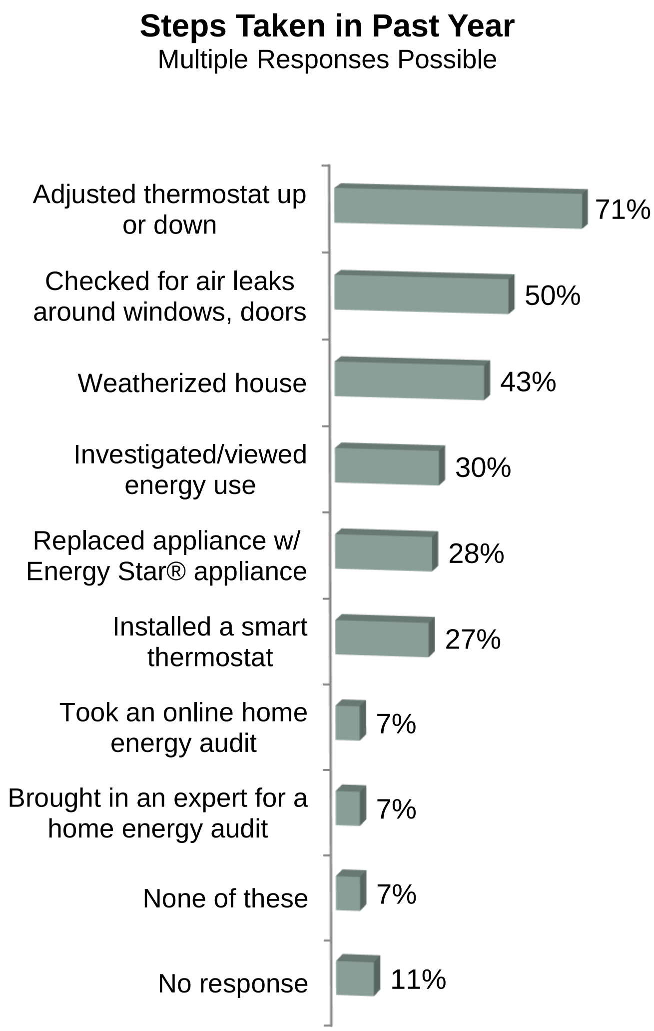
Appliances That Waste Energy
Multiple Responses Possible

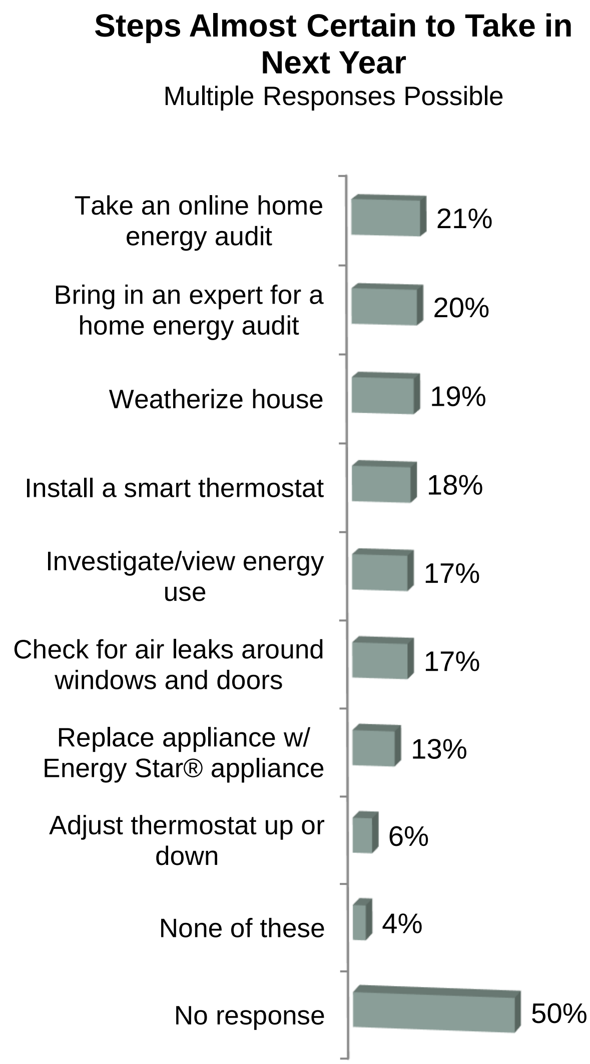


Environmental Champions are most likely to name at least one appliance that wastes too much energy in their home. Pro-Tech Skeptics are least likely.

	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Have at least one appliance that wastes too much energy	**73% (H)**	67%	63%	59%	*56% (L)*

Of the tested energy efficiency steps, co-op members are most likely to have adjusted their thermostat up or down in the past year. They are also likely to have checked for air leaks around windows/doors and weatherized their house. Fully half did not respond to the steps they are almost certain to take in the next year.





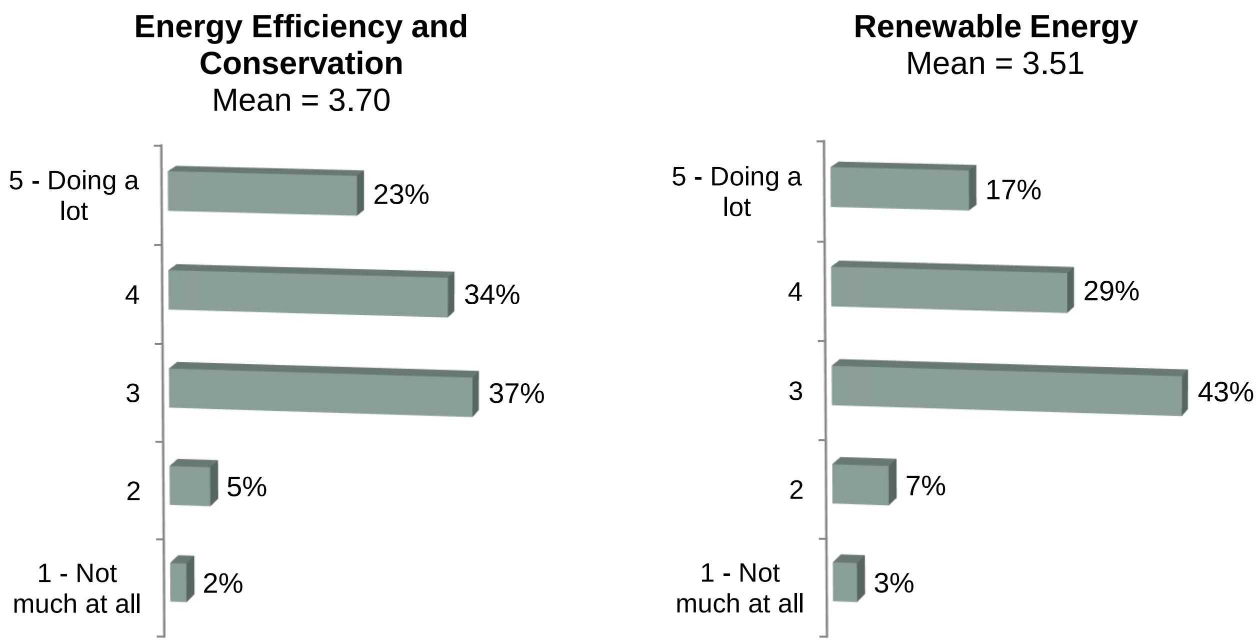
Of those who indicate they replaced a major appliance in the past year, an average of two appliances were replaced for an average cost of $3,147. An average of two major appliances are likely to be replaced in the next year.

Other energy saving measures that members took in the past year cost an average of $1,295. Among those who have taken at least one energy efficiency step in the past year, 36% say their use has decreased by a small amount and 32% say they haven't seen any change in energy use. One-fifth are unsure if they have seen a change or were not able to answer the question. Those who have not taken any energy efficiency steps in the past year most often say their home is already energy efficient or that their power bill is manageable.

Not surprisingly, Environmental Champions are the most likely to have taken energy efficiency steps in the previous year and spent more money on new energy efficient appliances and other energy saving measures in the past year, as well as plan to take steps in the upcoming year.

	Environ-mental Champion	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
Has taken energy efficiency steps in past year	**90% (H)**	82%	81%	80%	*78% (L)*
Money spent in past year on new energy efficient appliances (average)	**$3,340 (H)**	$3,128	*$2,933 (L)*	$3,230	$3,103
Money spent in past year on other energy saving measures	**$1,611 (H)**	$1,197	*$986 (L)*	$1,321	$1,424
Plan to take energy efficiency steps in next year	**55% (H)**	53%	46%	38%	*35% (L)*

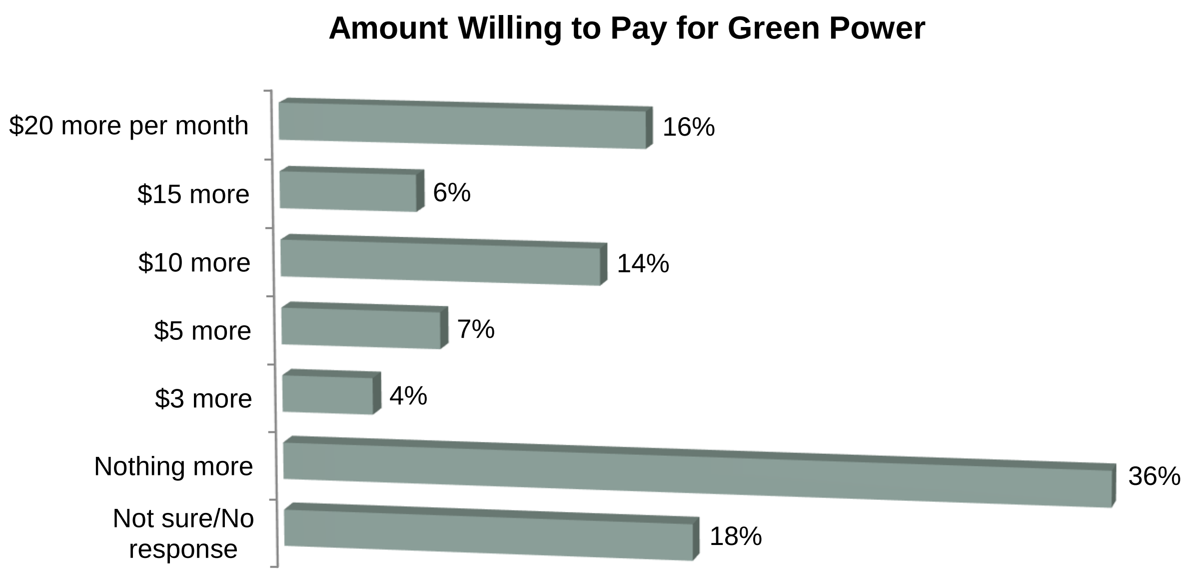
Nearly six in ten members give the highest ratings ("4" or "5") for how actively they feel their co-op is doing in promoting energy efficiency and conservation. Perceptions for how actively their co-op is promoting renewable energy are lower, with 46% giving a top rating.



Cost-Conscious Supporters give the highest ratings for how actively they feel their co-op is working to promote energy efficiency and conservation and renewable energy. This could indicate that this group is the most likely to hear the message from the co-op about what they are doing in these areas.

How actively co-op is working to promote:	**Environ-mental Champion**	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
Energy efficiency and conservation	3.73	**3.99 (H)**	3.53	3.76	*3.52 (L)*
Renewable energy	3.53	**3.87 (H)**	3.40	3.48	*3.22 (L)*

Just over one-third are willing to pay $10 or more each month to get electricity from renewable sources. However, the same proportion are not willing to pay anything more and 18% are not sure or were not able to respond.

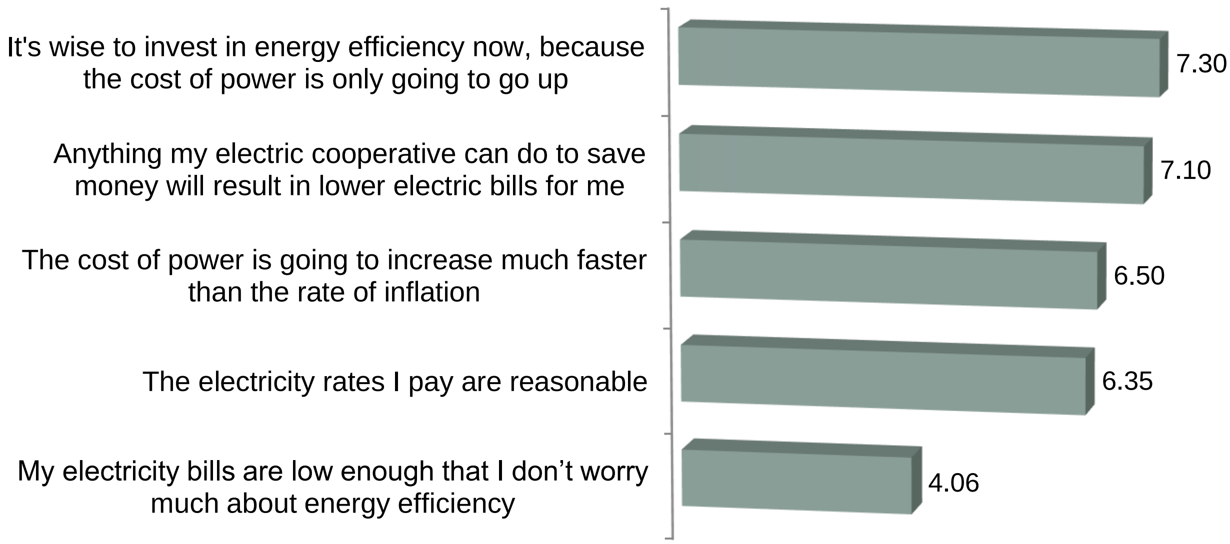


Although the Cost-Conscious Supporter and Complacent Consumer segments are not as willing to pay more for electricity from renewable sources as Environmental Champions, they are more willing to pay extra than are the other two segments.

	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Willing to pay more	**82% (H)**	48%	45%	17%	*16% (L)*
Willing to pay $10 or more	**74% (H)**	34%	31%	9%	*8% (L)*

Energy Use and Cost

In this area, respondents were asked to give their level of agreement on five statements regarding energy use and cost. Agreement is highest for the statement *it's wise to invest in energy efficiency now because the cost of power is only going to go up*. Agreement is lowest for the statement *my electricity bills are low enough that I don't worry much about energy efficiency*.

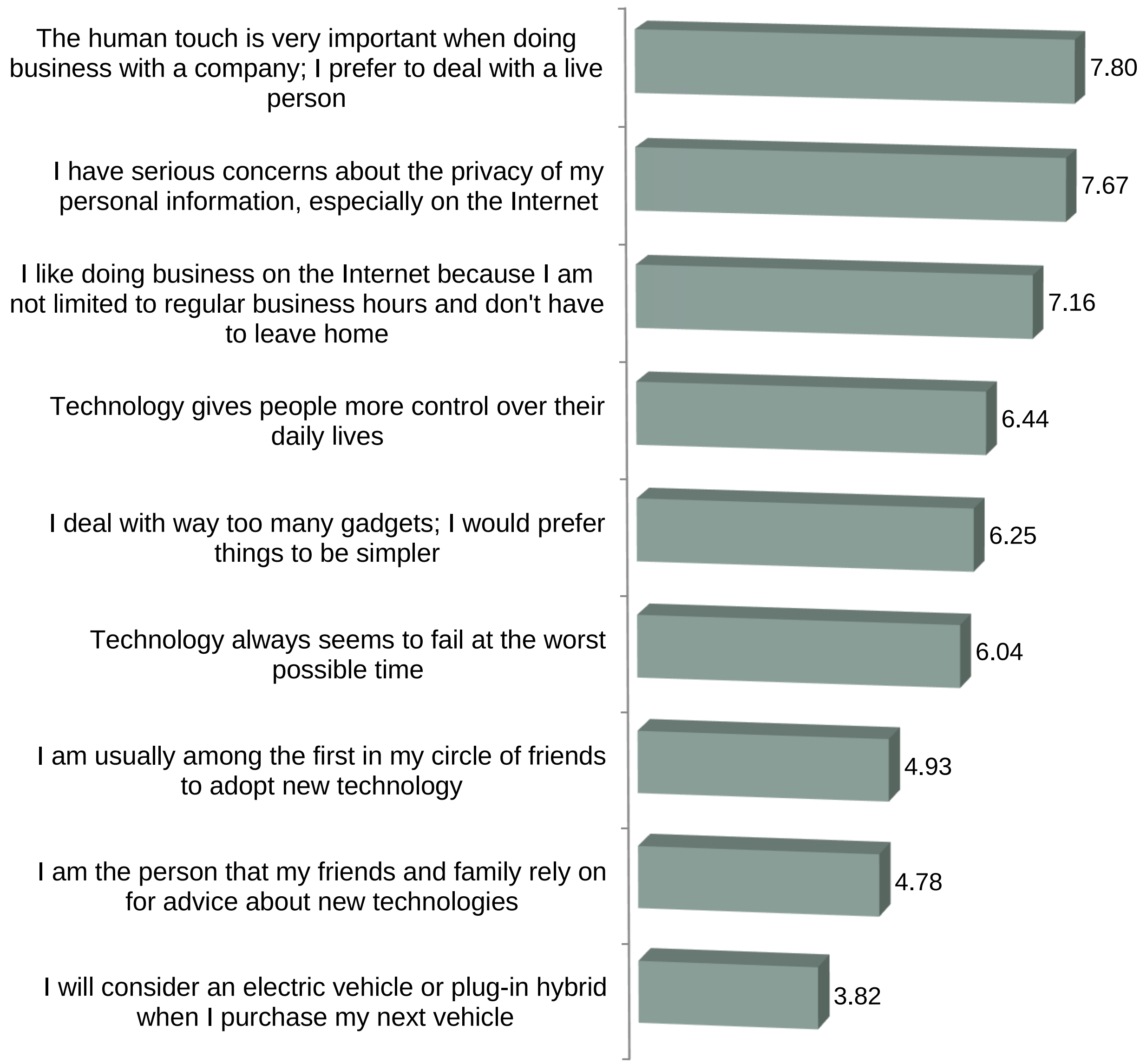


Cost-Conscious Consumers have the highest agreement on each of these statements.

	Environ-mental Champion	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
It's wise to invest in energy efficiency now because cost of power is only going to go up	8.22	**8.30 (H)**	6.65	6.99	*5.97 (L)*
Anything my electric co-op can do to save money will result in lower electric bills for me	7.19	**8.38 (H)**	6.53	7.08	*6.45 (L)*
Cost of power is going to increase much faster than the rate of inflation	6.18	**7.38 (H)**	*6.06 (L)*	7.15	6.11
The electric rates I pay are reasonable	6.92	**6.97 (H)**	5.78	6.26	*5.77 (L)*
My electric bills are low enough that I don't worry much about energy efficiency	*3.54 (L)*	**4.64 (H)**	4.04	4.15	4.15

Technology and Media Use

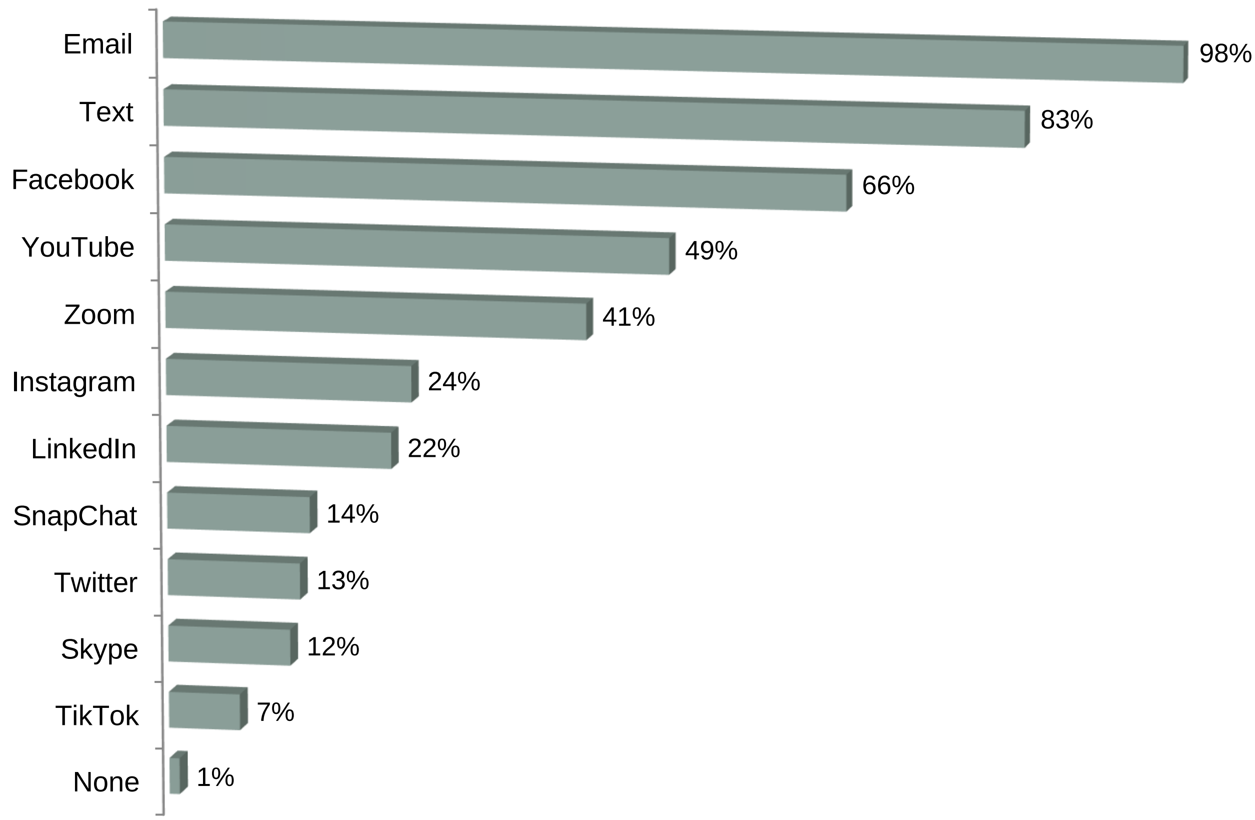
In this area, respondents were asked to give their level of agreement on nine statements regarding technology and media use. Agreement is highest for the statement *the human touch is very important when doing business with a company; I prefer to deal with a live person*. Agreement is lowest for the statement *I will consider an electric vehicle or plug-in hybrid when I purchase my next vehicle*.



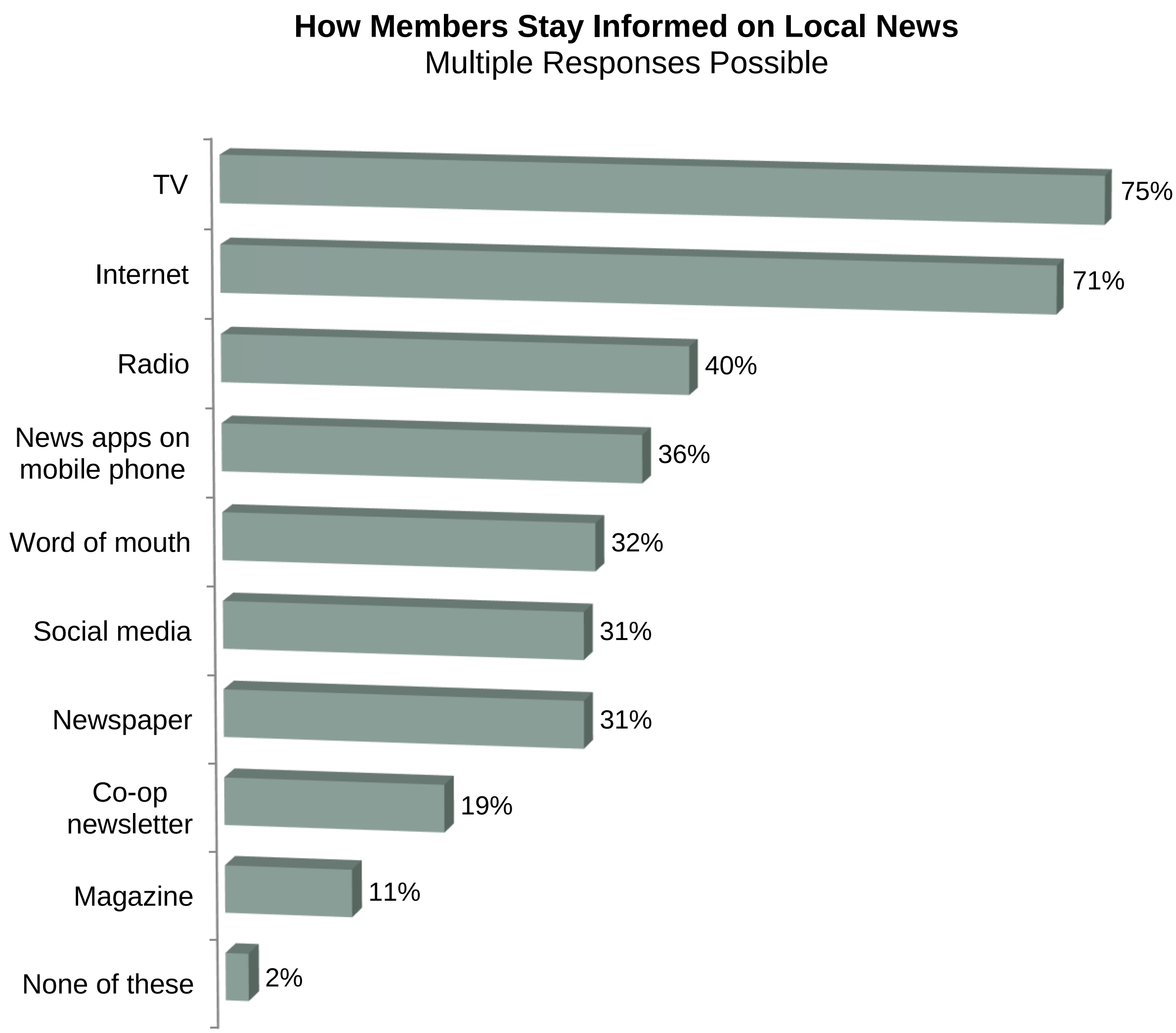
	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
The human touch is very important when doing business with a company	7.30	8.66	7.28	**9.11 (H)**	*7.21 (L)*
I have serious concerns about the privacy of my personal information, especially on the internet	7.33	8.61	7.08	**8.77 (H)**	*7.02 (L)*
I like doing business on the internet because I am not limited to regular business hours and don't have to leave home	**7.89 (H)**	7.43	6.69	*6.00 (L)*	7.78
Technology gives people more control over their daily lives	**7.36 (H)**	7.26	6.00	*4.72 (L)*	6.60
I deal with way too many gadgets; I would prefer things to be simpler	5.65	7.52	5.90	**7.80 (H)**	*4.63 (L)*
Technology always seems to fail at the worst possible time	*5.14 (L)*	7.13	5.76	**7.42 (H)**	5.24
I am usually among the first in my circle of friends to adopt new technology	5.62	5.55	4.33	*3.51 (L)*	**5.71 (H)**
I am the person that my friends and family rely on for advice about new technologies	5.20	5.20	4.19	*3.70 (L)*	**5.91 (H)**
I will consider an electric vehicle of plug-in hybrid when I purchase my next vehicle	**6.97 (H)**	3.78	3.05	*1.61 (L)*	2.26

All members indicate use of some form of electronic or social media, most often email. Text messaging is also used by the vast majority. Members are least likely to use TikTok.

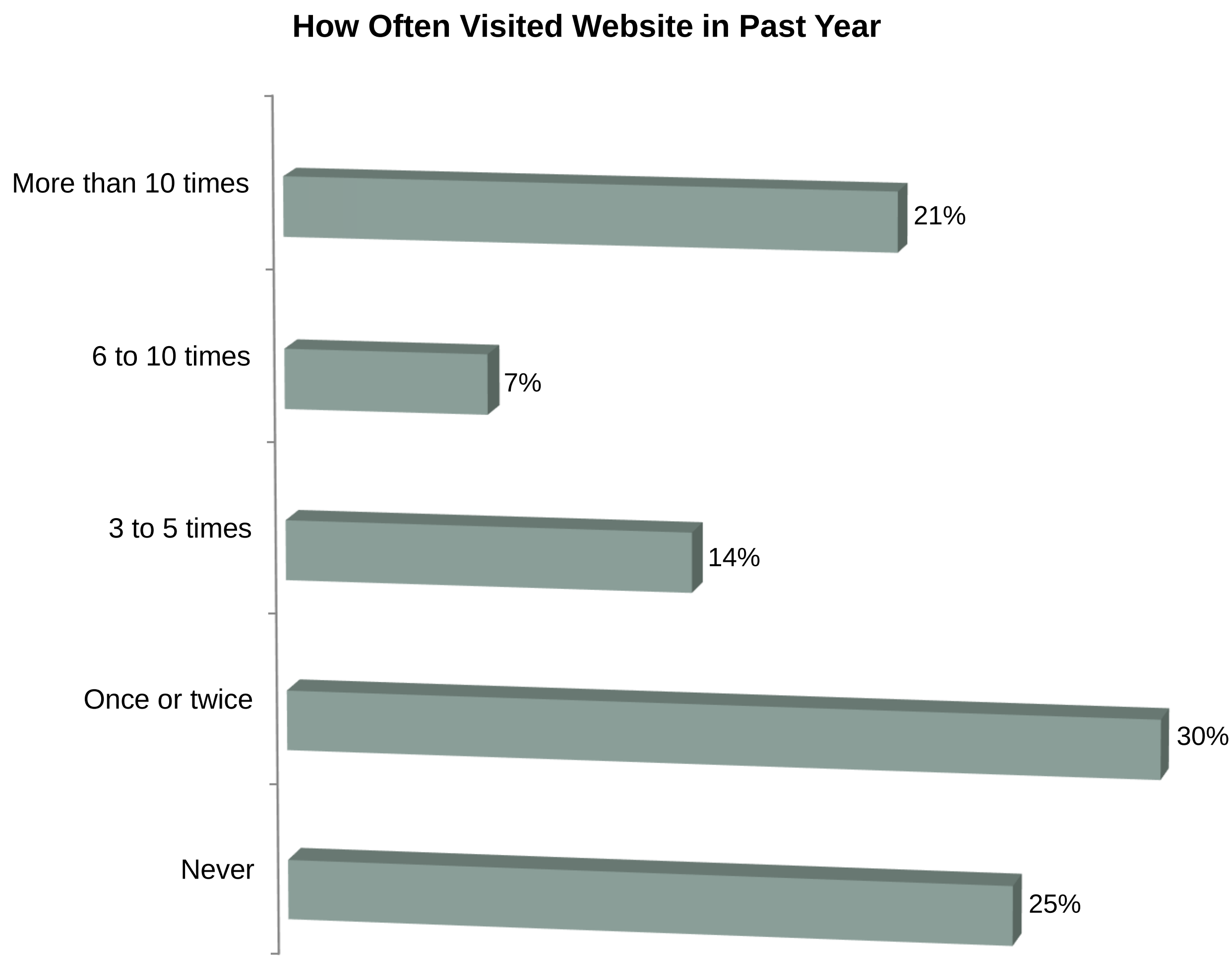
Electronic/Social Media Used
Multiple Responses Possible



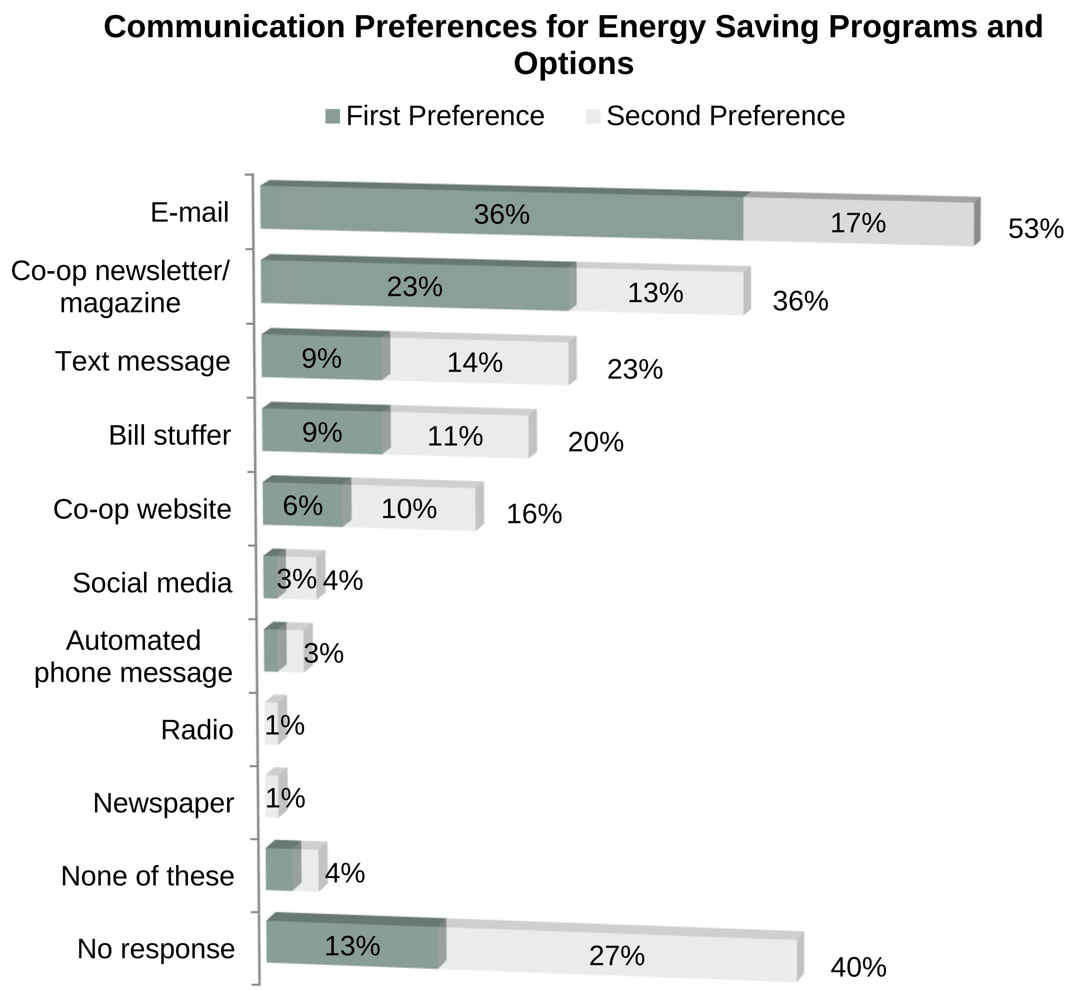
Three-quarters of the members use television to get their local news, followed by internet. Members are least likely to use magazines.



Seventy-five percent say they have visited their co-op's website in the past year. Those who have visited are most likely to have gone there to review and/or pay their bill. Members also visit for information on outages.



Members are most likely to prefer email for communication from their co-op about energy saving programs and options. Just over half name email as their first or second preference.



	Environ-mental Champion	Cost-Conscious Supporter	Complacent Consumer	Low-Tech Skeptic	Pro-Tech Skeptic
Uses electronic/ social media	**100% (H)**	*98% (L)*	99%	99%	99%
Sources used to stay informed					
--Television	76%	**84% (H)**	80%	*64% (L)*	*64% (L)*
--Internet	**80% (H)**	69%	70%	*59% (L)*	75%
--Co-op newsletter	**24% (H)**	20%	*16% (L)*	*16% (L)*	*16% (L)*
Has visited co-op website	75%	69%	71%	*67% (L)*	**79% (H)**
Preferred method for co-op to communicate					
--Email	**43% (H)**	32%	33%	*29% (L)*	39%
--Co-op newsletter	23%	23%	21%	**28% (H)**	*20% (L)*

Lifestyle/Residence

In the last section of the survey, respondents were asked to give their level of agreement on seven statements regarding lifestyle. Agreement is highest for the statement *in today's economy, I am always looking for ways to save money*. Agreement is lowest for the statement *I often write reviews for products and services on the internet*.

	Environ-mental Champion	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
I am always looking for ways to save money	8.08	**9.06 (H)**	7.51	8.16	*7.38 (L)*
A local company will provide better service	7.45	8.45	*7.06 (L)*	**8.60 (H)**	7.34
I never have enough time to get everything done	5.80	**6.71 (H)**	5.91	6.40	*5.53 (L)*
I get so much information sent to me that I rarely look at anything in-depth	5.23	6.12	5.46	**6.23 (H)**	*5.17 (L)*
When making a significant purchase, I usually rely on advice of others	5.46	**6.10 (H)**	5.36	5.16	*4.88 (L)*
I am actively involved in civic and local affairs	4.66	**4.75 (H)**	*3.89 (L)*	4.17	4.48
I often write reviews for products and services on the internet	3.60	**4.31 (H)**	3.21	*2.89 (L)*	4.01

Demographics

Demographics	**TOTAL**	**Environ-mental Champion**	**Cost-Conscious Supporter**	**Complacent Consumer**	**Low-Tech Skeptic**	**Pro-Tech Skeptic**
% of members		**25%**	**18%**	**29%**	**15%**	**13%**
Average Age	57	58	**59 (H)**	*56 (L)*	**59 (H)**	*56 (L)*
% under 45	18%	18%	15%	21%	*13% (L)*	**23% (H)**
% 65 or older	38%	**44% (H)**	43%	*32% (L)*	39%	*32% (L)*
Work full-time	50%	*43%(L)*	44%	55%	49%	**59% (H)**
Retired	38%	**43% (H)**	**43% (H)**	33%	39%	*32% (L)*
Average Income	$77,400	**$85,400 (H)**	*$69,000 (L)*	$75,100	$76,100	$80,300
Homeowner	86%	*83% (L)*	85%	86%	**90% (H)**	88%
Home Value	$299,600	**$375,000 (H)**	*$253,000 (L)*	$269,000	$280,000	$313,000
Years in Residence	10.6	10.6	10.6	10.5	**11.2 (H)**	*10.2 (L)*
Single family home	80%	81%	*76% (L)*	78%	85%	**86% (H)**
Mobile/Mfd home	10%	*6% (L)*	**14% (H)**	13%	10%	8%
Townhouse/ Condo/ Apt	8%	**12% (H)**	8%	8%	*4% (L)*	*4% (L)*
Married	71%	*64% (L)*	71%	73%	**75% (H)**	74%
Children	37%	*34% (L)*	36%	**39% (H)**	37%	37%
Household Size	2.6	*2.3 (L)*	2.6	**2.7 (H)**	2.6	2.6
Live alone	22%	**29% (H)**	*19% (L)*	*19% (L)*	*19% (L)*	22%
4 or more	23%	*18% (L)*	23%	**26% (H)**	25%	24%
High School	51%	*45% (L)*	**54% (H)**	53%	52%	51%
College Degree	49%	**55% (H)**	*46% (L)*	47%	48%	49%
Post Graduate	19%	**26% (H)**	*16% (L)*	*16% (L)*	17%	19%
Rural	68%	*60% (L)*	68%	69%	**76% (H)**	71%
Suburban/Urban	32%	**40% (H)**	32%	31%	*24% (L)*	29%
Vote all the time	75%	81%	71%	*65% (L)*	**85% (H)**	83%
Vote most of the time	15%	13%	**16% (H)**	21%	10% *(L)*	12%
Male	51%	48%	*42% (L)*	45%	61%	**70% (H)**
Female	45%	48%	**55% (H)**	51%	34%	*27% (L)*

H = Highest of the segments
L = Lowest of the segments

Differences by Age

By age group, members who are 65 or older are significantly more likely to fall into the Environmental Champion or Cost-Conscious Supporter segment than are those who are younger. Those under 65 are significantly more likely to be in the Complacent Consumer or Pro-Tech Skeptic segment. Those who are 45 or older are significantly more likely to be a Low-Tech Skeptic.

	Under 45	45-54	55-64	65 or older
Environmental Champion	25%	20%	22%	28%
Cost-Conscious Supporter	15%	16%	18%	21%
Complacent Consumer	33%	34%	29%	24%
Low-Tech Skeptic	11%	15%	18%	16%
Pro-Tech Skeptic	17%	15%	13%	11%

Older members are more satisfied with their co-op than are younger members and give higher ratings for all the performance attributes. Older members are also more likely to:

- See themselves as a member of their co-op, as opposed to only being a customer.
- Feel their co-op is working to promote energy efficiency/conservation and renewable energy.
- Pay more each month to get electricity from renewable energy sources, especially $20 more (however, note that they are also more likely to be unsure how much more they would be willing to spend, if anything).
- Use TV, newspaper, the co-op newsletter and/or magazines to stay informed on local news/events.
- Prefer the co-op use the co-op newsletter to communicate with them about energy saving programs and options.

Conversely, younger members are more likely to:

- See their monthly electric bill as being a serious issue for their household budget.
- Have run into challenges paying their electric bill on time in the past year.
- Switch household appliances, outdoor household tools and their vehicles from being powered by fossil fuels to electricity.
- Indicate their household appliances waste too much energy.
- Say they are almost certain to take energy efficiency steps in the next 12 months.
- Use electronic/social media in general and prefer digital media to stay informed on local news/events and for the co-op to communicate with them about energy saving programs and options.
- Have visited the co-op's website in the past year.

Differences by Location

Members who live in an urban/suburban area are significantly more likely to fall into the Environmental Champion segment while those who live in a rural area are more likely to be in the Low-Tech Skeptic segment.

	Rural	Urban/ Suburban
Environmental Champion	22%	31%
Cost-Conscious Supporter	18%	18%
Complacent Consumer	29%	28%
Low-Tech Skeptic	17%	11%
Pro-Tech Skeptic	14%	12%

Members who live in an urban/suburban area are more satisfied with their co-op than are those who live in a rural area. They also tend to give higher ratings for the performance attributes, although not all the differences are significant. These urban/suburban members are also more likely to:

- Be unsure if they feel like a member or customer of their co-op.
- Switch household appliances, outdoor household tools and their vehicles from being powered by fossil fuels to electricity.
- Think their dishwasher and/or washing machine wastes too much energy.
- Have taken the energy conservation steps of adjusting their thermostat up or down and/or installing a smart thermostat.
- Pay more each month to get electricity from renewable energy sources.
- Use the internet and news apps to stay informed on local news/events.
- Have visited the co-op’s website in the past year.
- Prefer the co-op use email to communicate with them about energy saving programs and options.

Conversely, rural members are more likely to:

- See themselves as a member of their co-op.
- See their monthly electric bill as being a serious issue for their household budget.
- Have run into challenges paying their electric bill on time in the past year.
- Think their water heater wastes too much energy.
- Have taken the energy conservation steps of checking for air leaks around windows/doors and/or weatherizing their house.

- Use the co-op newsletter to stay informed on local news/events.
- Prefer the co-op use the co-op newsletter and/or automated phone messages to communicate with them about energy saving programs and options.

Although rural and urban/suburban members do not differ significantly in their use of email, text message and Facebook, urban/suburban members are more likely to use YouTube, Zoom, Instagram, LinkedIn, SnapChat, Twitter and Skype.

APPENDIX A: Core Questionnaire