

A SUMMARY OF NATIONAL AND REGIONAL SURVEYS
AFFIRMING CONSISTENT PUBLIC SUPPORT FOR
CONSERVATION AND RENEWABLE ENERGY

Compiled by the Renewable Northwest Project

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INTRODUCTION

The Renewable Northwest Project (RNP) reports strong, consistent, and diverse support for the environment, and the continued acquisition of conservation and renewable energy resources, based on 13 national and regional surveys, plus information from utility focus groups all completed within the past two years. This support is broad-based, crossing utility customer classes, economic classes, political inclinations, educational achievement, geography, and ethnicity. The surveys and focus groups were performed by public and private utilities, public interest organizations, and industry associations.

This document summarizes key findings from these surveys and focus groups, and includes the entity who commissioned the study, sample sizes, surveying dates, and when possible, the margin of error. Individual survey questions are quoted to provide some context.

NATIONAL SURVEY KEY FINDINGS

Sustainable Energy Budget Coalition, Washington, DC

1,000 random registered voters surveyed December 1-10, 1995. ± 3.1% error.

- Over 70% of respondents believe global climate change is a serious problem. Seventy-five percent expressed willingness to pay higher utility rates if the money was used to supply electricity from renewable resources. A majority also wanted conservation and renewable energy resources to receive the highest priority for US Department of Energy (USDOE) research and development funds.

Public Citizen, Austin, TX

400 random adult Texas residents surveyed September 29, October 2-3, 1994. ± 4.9% error.

- Seventy-five percent favored requiring non-polluting electricity generation technologies to be responsible for one-quarter of new power supplies through the year 2005. Seventy percent were willing to spend up to \$5 extra per month to receive electricity from renewable resources. When asked the same question, without a pre-determined amount, 52% would still pay extra, some up to \$15/month.

PACIFIC NORTHWEST SURVEYS AND FOCUS GROUPS

Western Montana G & T, Missoula, MT

Results are weighted from surveys of member utilities taken in July, 1995.

- Sixty-one percent agreed that their utility should only acquire resources having a positive or neutral effect on the environment. Seventy percent wanted the utility to promote programs to increase conservation. Forty-four percent wanted their utility to build, or purchase power from, wind and solar resources to meet loads five years into the future, if needed. These two renewable resources received the highest two voting totals.

Salem Electric Cooperative

Responses to a June, 1995 newsletter article sent to ratepayers.

- Seventy-eight percent of responses emphatically supported an investment in renewable energy resources. The supporters felt that all ratepayers, except for low-income people (150% of poverty level), should participate in the investment. The majority supported a rate increase between 4% - 8% to make the utility 20% - 40% 'green.'

Eugene Water & Electric Board, Eugene, OR

EWEB surveyed 400 customers, June 2-11, 1995.

- Customers prioritized conservation, wind, central solar, distributed solar, and geothermal resources, as their top energy resource choices, in that order. Nearly 60% would spend between \$1 and \$12 extra per month on their utility bills to ensure the use of conservation and renewable energy resources for future energy needs.

Emerald People's Utility District

926 responses to 1,831 survey mailed out in May, 1995.

- Conservation, solar, wind, landfill methane recovery, and geothermal resources, respectively, received the five highest levels of customer support for resource investment. Nearly 60% would pay extra on their monthly utility bill to support renewable energy resources; 50% would do so to fund conservation efforts.

KENETECH Windpower

801 telephone interviews with Oregon and Washington adults, 18 or older (401_WA; 400_OR), May 23-25, 1995 by the Wirthlin Group.

- Eighty-six percent would replace lost hydro capacity with wind, even if their monthly utility bill increased by \$9.

1,009 randomly dialed California adults 21 and older, surveyed January 20, 22-24, 1994 by the Wirthlin Group. ± 3.1% error.

- Ninety-five percent wanted a cleaner environment, and 82% supported the development of wind power. Given the option of personally awarding energy supply contracts, 68% would choose wind power.

Sacramento Municipal Utility District, Sacramento, CA

401 residential and 392 business customers surveyed in February, 1995. Residential customers were selected from all single and multi-family households within the service territory; and business customers were chosen from agricultural and commercial customers with less than 1 MW billing demand.

- More than 80% of residential and business participants selected environmental responsibility as an important utility service; nearly 75% in both customer classes selected "promoting renewable electricity production" as an important service. Additionally, 43% of residential and 38% of business customers would pay 5% extra in their monthly bill to promote the use of renewable energy resources.

Portland General Electric

766 random phone interviews (400_residential, 366_commercial), July, 1994.

- Sixty-one percent of residential customers, and 65% of business customers, wanted PGE to prioritize development of renewable energy resources (solar, wind, geothermal specifically) in the next five years.

59 focus group participants (27_residential, 32_commercial), selected by annual electricity consumption (commercial), and pre-tax household income (residential). February 28 - March 2, 1994.

- Nearly 100% of residential and commercial customers felt that it was important for their utility to be environmentally responsible. Renewable resources filled 70 of 100 megawatts in a sample resource mix as chosen by participants. Ninety percent of residential and commercial customers felt that generating electricity from renewable resources was important. Over 90% of residential and commercial customers felt that energy efficiency programs were important.

Washington Water Power

300 randomly chosen customers surveyed July 27 - August 1, 1994. ± 5.7% error.

- Ninety-five percent felt that WWP should continue to offer energy efficiency programs, even if WWP had enough energy to meet customer loads into the foreseeable future. Eighty-three percent agreed that if new energy efficiency programs were offered, and funded by a \$1/month surcharge on all customer bills, then WWP should offer such programs. Fifty-seven percent wanted WWP to offer energy efficiency programs regardless of whether customer bills are lowered.

Snohomish County Public Utility District

Approximately twenty-five people in focus groups completed August, 1995.

- Customers expressed support for spending up to 10% extra per month on their utility bill for renewable resources.

CONCLUSION

The message presented within these results is clear: the American public in general, and particularly those in the Northwest, feel that environmental preservation is important, and that their utility should prioritize conservation and renewable resources. Many are willing to pay higher rates if that led to these resources being used.

NATIONAL SURVEY SAMPLE QUESTIONS AND ANSWERS

The following are the full text of selected questions and answers from the listed surveys and focus groups, providing documentation for the conclusions drawn above.

Sustainable Energy Budget Coalition (December 1995 survey)

- "In your mind, how serious a threat do you think global climate change, also known as global warming, caused by emissions from the combustion of oil, gasoline, and coal is?"

Very Serious_____	35.5%	70.9% think it's serious.
Somewhat Serious_____	35.4%	
Not Too Serious_____	16.0%	
Not A Threat At All_____	8.7%	
Don't Know / Refused_____	4.4%	

- "Which of these research and development programs do you think should receive the highest priority for funding in the [federal] Department of Energy's research and development budget?"

R & D Programs	% in Favor	
Renewable Energy Involving solar, wind, geothermal, biomass and hydroelectric power_____	34.1	55% prefer renewables & conservation.
Technologies to Improve Energy		
Efficiency and Conservation_____	21.0	
Natural Gas_____	9.0	
Fossil Fuels Such As Oil, Gasoline and Coal_____	8.6	
Nuclear Power_____	8.5	
None of These_____	4.8	
Don't Know / Refused_____	14.0	

- *(Only those who believed the US should reduce oil imports were asked this question - in total, 75% of those surveyed.)*

"A number of options have been suggested for reducing oil imports. As I read each of them, please tell me whether you favor or oppose the proposed policy. And would that be strongly (favor/oppose) or just somewhat (favor/oppose)?"

Support the development of renewable energy alternatives to oil.

Strongly Favor_____	66.4%	90% favor renewables.
Somewhat Favor_____	23.9%	
Somewhat Oppose_____	4.1%	
Strongly Oppose_____	2.1%	

- “Suppose you have the chance to choose your electric company the same way you now can choose your long-distance telephone company and the choice were between a utility company which uses coal to generate electricity and a utility company that produces electricity using cleaner, but slightly more expensive renewable energy sources. Of the following, which indicates how much more you are willing to spend per month for electricity generated from cleaner renewable sources:

Up to 2% per month_____	23.2%	} 75% willing to pay.
Up to 5%_____	25.6%	
Up to 10%_____	19.2%	
Up to 20%_____	4.8%	
More than 20%_____	2.5%	
I wouldn't pay any more for electricity generated by renewable sources_____	23.9%	
Don't Know / Refused_____	0.8%	

**PACIFIC NORTHWEST SURVEY AND FOCUS GROUP
SAMPLE QUESTIONS AND ANSWERS**

Western Montana G & T (July 1995 surveys)

- “Suppose that your electric utility needs to build or purchase a new generating facility to meet customer needs 5 years from now. Which of the following would you prefer that your utility build or purchase?”

Windmills_____	23%
Solar Plant_____	21%
Hydroelectric Dam_____	19%
Natural Gas Combustion Turbine_____	13%
Wood/Municipal Waste Burning Plant_____	10%
Nuclear Plant_____	5%
Coal Plant_____	3%

- “Next I'm going to read some statements. Please use a scale to 1-5, where 5 indicates that you strongly agree; 3 indicates that you are neutral, and 1 indicates that you strongly disagree. How would you rate your agreement with the statements?”

“The utility should promote programs that increase the conservation of electricity.”

AGREE___70%; NEUTRAL___25%; DISAGREE___5%.

“The utility should only acquire resources that have positive or neutral effects on the environment.”

AGREE___61%; NEUTRAL___32%; DISAGREE___7%.

- “Do you feel that it is more important for your utility to promote programs that increase the efficient use of electricity, or to keep rates as low as possible?”

Promote efficient use of electricity_53%.

Keep rates as low as possible___51%.

Eugene Water & Electric Board (June 1995 surveys)

- “Assuming similar costs for each resource, how strongly do you support or oppose EWEB’s involvement in each of the following on a scale of 1 to 5, where 1 is STRONGLY OPPOSE and 5 is STRONGLY SUPPORT?”

<u>Resource</u>	<u>Average Score</u>
Conservation	4.7
Wind	4.2
Central Solar	4.1
Individual Solar	4.1
Geothermal	4.0
Hydroelectric	4.0
Methane (Landfill recovery)	4.0
Co-Generation	3.9
Natural Gas	3.5
Coal	1.8
Nuclear	1.7

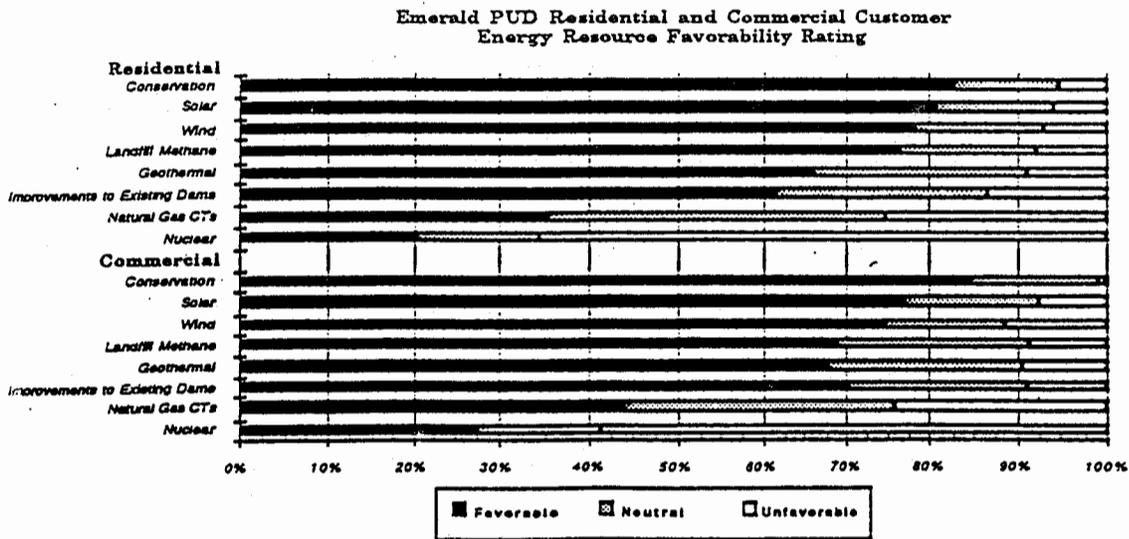
Emerald People’s Utility District (May 1995 survey)

- “How much more would you be willing to pay in your monthly utility bill to ensure that renewable resources (solar, wind, geothermal, etc.) are used to meet our future energy needs?”

<u>Amount</u>	<u>% Responding</u>
Nothing	41.1
\$1.00	33.5
\$5.00	16.7
\$7.50	4.4
Other	4.3

59% would pay.

- “How do you feel about the resource shown, as well as the following other energy resources?”



Portland General Electric (February-March 1994 focus groups)

- "Let's take a look at the resources PGE currently uses to acquire electricity. What do you think about these resources?" The following general responses were recorded:

"A higher than expected percentage of purchased power."

"Disappointment in the lack of non-hydro renewables."

"The smallness of the energy efficiency contribution."

- "Let's imagine that each of you is a resources manager for PGE. As a resource manager, you have to acquire 100 new megawatts of electricity. ...Decide which resources you would choose to acquire these 100 megawatts." (If asked about cost of individual resources, let participants know that cost is not a variable they need to consider.) *In Original*

RESOURCES	AVERAGE MEGAWATTS		
	Residential	Commercial	
Green Resources (net)			
Energy Efficiency	17	14	
Solar Power Plant	8	9	
Geothermal	10	5	
Photovoltaics	9	5	
Wind	8	5	
Biomass	2	8	
Hydro	16	17	
Green Resources subtotal	70	63	
Gas Fired Cogeneration	5	10	
Gas Fired Turbine	12	8	
Purchased Power	5	9	
Coal	1	3	
Nuclear	3	1	

54, 46 MW of non-hydro renewables.