Understanding what Idahoans think about Energy Codes

2013 Idaho Homeowner Energy Code Survey

PRESENTER
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Thank you

The Team

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SIGNIFICANT FINDINGS

- Top drivers for supporting energy codes include lower monthly costs and a belief that they have a right to a new home purchase that meets energy standards.
- Idahoans agree that the State should adopt a state energy code consistent with national standards. However, less than half say that they trust the State to adopt the right energy codes.
- A payback period of 7 years is acceptable.
LEARNING OBJECTIVES

1. Analyze the process to get funding and conduct market research.

2. Identify the most significant barriers related to energy code adoption and implementation.

3. Discover why various audiences value energy codes or not.

4. Translate survey results to create marketing messages for advancing energy codes.
TODAY’S AGENDA

- Background
- Survey Goals
- Methodology
- Results
- Lessons Learned
- Marketing
BACKGROUND

- Boise State University in collaboration with Northwest Research Group and Eco Edge with oversight from the Office of Energy Resources surveyed Idaho homeowners and renters intending to purchase a home.

- Funding was provided by Bonneville Power Administration.

- This 2013 study expanded on a market assessment conducted in 2012, also funded by Bonneville Power Administration, to survey architects, building officials, city and county elected officials, and a limited survey of homeowners in the Treasure Valley.
  - This limited homeowner survey (conducted via email) formed the basis for a broader, more scientific study.
The Idaho Energy Code Collaborative facilitates energy code implementation through education, outreach and technical assistance and prepares for new energy codes by vetting changes and providing an open forum for stakeholders to voice concerns and reach consensus.
Email surveys to elected officials, building officials and architects.

Most significant barrier?

<table>
<thead>
<tr>
<th></th>
<th>Education and training</th>
<th>Perceived higher cost to comply</th>
<th>State enforcement resources</th>
<th>Local jurisdiction capacity to enforce</th>
</tr>
</thead>
<tbody>
<tr>
<td>Elected Officials</td>
<td>29%</td>
<td>49%</td>
<td>3%</td>
<td>19%</td>
</tr>
<tr>
<td>Building Officials</td>
<td>38%</td>
<td>50%</td>
<td>2%</td>
<td>11%</td>
</tr>
<tr>
<td>Architects</td>
<td>44%</td>
<td>39%</td>
<td>6%</td>
<td>11%</td>
</tr>
</tbody>
</table>

How much are homeowners willing to finance?

<table>
<thead>
<tr>
<th></th>
<th>$2,500 – 5,000</th>
<th>$1,000 – 2,500</th>
<th>$500 – 1,000</th>
<th>Less than $500</th>
</tr>
</thead>
<tbody>
<tr>
<td>Homeowners</td>
<td>43%</td>
<td>36%</td>
<td>11%</td>
<td>9%</td>
</tr>
</tbody>
</table>
SURVEY GOALS

1. Determine *if* Idahoans value energy efficiency

2. Establish a *priority* of value

3. Determine if Idaho homeowners value *statewide standards* for energy efficiency

4. Determine how much Idaho homeowners are *willing to pay* for energy efficiency
METHODOLOGY

600 Random Digit Dial surveys

13 minutes each

30% wireless

Homeowners and renters, over age 18.
METHODOLOGY

265

205

130
METHODOLOGY

- Pre-tested $n=30$ respondents
- ISO 20252:2012 Market Research Standards
- December 12-December 22, 2013
- Demographics monitored

$\pm 4\%$ variance 95% confidence level
RESULTS

- Home Energy Consumption
- Attitudes towards Energy Codes
- Idaho Energy Standards
- Energy Consumption Attitudes
- Willingness to Pay
- Education / Sources of Information
- Key Drivers
65% favor energy codes
Key Drivers

What Drives Agreement with Energy Codes?

- **Lowers Monthly Operating Costs**
  - Disagree (1-3): 18%
  - Neutral (4): 14%
  - Somewhat Agree (5-6): 30%
  - Strongly Agree (7): 37%

- **Ensures Quality Construction**
  - Disagree (1-3): 23%
  - Neutral (4): 12%
  - Somewhat Agree (5-6): 33%
  - Strongly Agree (7): 33%

- **Protects from high utility bills**
  - Disagree (1-3): 27%
  - Neutral (4): 12%
  - Somewhat Agree (5-6): 29%
  - Strongly Agree (7): 31%

- **Right to Home that Meets Energy Standards**
  - Disagree (1-3): 15%
  - Neutral (4): 13%
  - Somewhat Agree (5-6): 31%
  - Strongly Agree (7): 42%

Base: Random selection respondents (weighted n=277-323 / unweighted n=300)
Arrows indicate statistically significant difference at 95% confidence level
Bolding indicates statistically significant difference at 90% confidence level
Northwest Research Group, February 2014
Key Drivers

What Drives Disagreement with Energy Codes?

- Limits Homeowner’s Rights
  - Disagree (1-3): 29%
  - Neutral (4): 8%
  - Somewhat Agree (5-6): 22%
  - Strongly Agree (7): 41%

- More Government Regulation
  - Disagree (1-3): 47%
  - Neutral (4): 9%
  - Somewhat Agree (5-6): 26%
  - Strongly Agree (7): 18%

Base: All respondents (n=600)

Arrows indicate statistically significant difference at 95% confidence level.
Bolding indicates statistically significant difference at 90% confidence level.

Northwest Research Group, February 2014
Attitudes toward Energy Codes

Idahoans strongly agree that energy efficient homes have a higher resale value and also increase the purchase price of a home.

- Increases Resale Value: 42% Agree, 10% Disagree
- Right to Home that Meets Standards: 31% Agree, 15% Disagree
- Lowers Monthly Operating Costs: 30% Agree, 18% Disagree
- Adds to Purchase Price of Home: 26% Agree, 18% Disagree
- More Government Regulation: 26% Agree, 47% Disagree
- Makes Home Less Comfortable (increase stale air): 19% Agree, 16% Disagree

Base: Random selection respondents (weighted n=277-323 / unweighted n=300)

Arrows indicate statistically significant difference at 95% confidence level
Bolding indicates statistically significant difference at 90% confidence level

Northwest Research Group, February 2014
Idaho Energy Standards

Nearly 2 out of 3 Idahoans agree that the State should adopt a state energy code consistent with national standards; however, less than half say that they trust the State to adopt the right energy codes.

Arrows indicate statistically significant difference at 95% confidence level
Bolding indicates statistically significant difference at 90% confidence level

Base: All respondents (n=600)
Willingness to Pay

Idahoans appear to be willing to pay as much as $10 per month in additional rent or mortgage costs to save $16 per month on energy bills. Those living in Southwest Idaho are willing to pay more per month in rent or mortgage costs to save money on energy while those living in Northern Idaho are willing to pay less.

$10 payment to save $16 per month

Idahoans appear to be willing to accept a payback period of about 7 years to build a more energy-efficient home.

7 year simple payback
Nearly 4 out of 5 Idahoans feel their home is at least somewhat energy efficient.
Energy Consumption Attitudes

More than three quarters of respondents (77%) agree that they can make a real impact if everyone conserves energy.
Education / Sources of Information

Just under half of the respondents are interested in learning how their homes compare to others.

- Not at all interested, 28%
- Very Interested, 17%
- Somewhat Interested, 29%
- Not very interested, 26%

Base: All respondents (n=600)
Arrows indicate statistically significant difference at 95% confidence level
Bolding indicates statistically significant difference at 90% confidence level

Northwest Research Group, February 2014
Education / Sources of Information

The most believable information sources would be local people such as an architect, a local building inspector, or their local utility.

% who would believe energy efficiency information coming from . . .

- Architect/Engineer: 82%
- Local building inspector: 76%
- Local Utility: 71%
- Builder: 63%
- Federal government: 61%
- Recent home buyer: 59%
- State official: 53%
- Internet: 32%
- Salesperson: 24%

Base: All respondents (n=600)

Arrows indicate statistically significant difference at 95% confidence level.
Bolding indicates statistically significant difference at 90% confidence level.

Northwest Research Group, February 2014
LESSONS LEARNED

- Idahoans perceive their homes as energy efficient but need education on what makes it energy efficient.
- Emphasize financials such as resale value and monthly savings.
- Don’t step on rights; recognize them.
- Idahoans agree that Idaho should adopt a state energy code consistent with national standards.
- Communicate how much it will cost and how much it will save within a 7 year payback.
1. Focus marketing materials on the top three messages.

2. Provide homeowner education on what makes a home energy efficient.

3. Utilize direct mailings from the local power utility for conveying messages and direct homeowners to online resources such as www.idahoenergycode.com.
1. Energy codes lower monthly operating costs and protect homeowners from high utility bills.

2. Energy codes ensure quality construction.

3. Homeowners purchasing a new home have a right to a home that meets national energy standards.
Results and documents to be made available on [www.idahoenergycode.com](http://www.idahoenergycode.com).

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