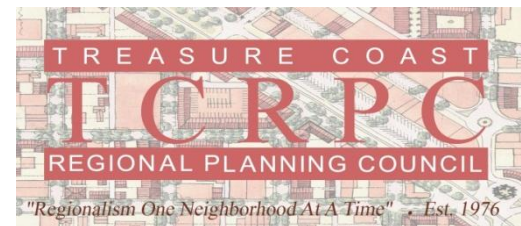


# Florida

Energy Resiliency Strategy

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## Energy Survey Results



## Purpose

- The survey study examines individuals' reactions to a broad range of energy issues including conservation, investment in energy saving devices, motivations for conserving energy, impact of energy cost increases on lifestyle, and government policies affecting energy.
- **Summary**
- Two surveys administered – residential and business survey
- Results of the surveys intended to help decision-makers create options for Florida relating to energy security issues and aid in state energy planning

## Methodology

- Population definition
  - All households in the following areas: EPA 1, EPA 2, EPA 3, EPA 4, & EPA 5
  - Person most knowledgeable about energy issues
- Sampling frame
  - All working cellular and landline telephone numbers
- Sample size
  - 750 in total study
  - 150 in EPA 1
  - 150 in EPA 2
  - 150 in EPA 3
  - 150 in EPA 4
  - **150 in EPA 5 – SFRPC + TCRPC**
- Sampling error (given a 95% confidence interval)
  - 3.6% points in total study
  - 8.0% points for each EPA
- Data collection
  - Telephone interviews conducted from Kerr & Downs Research's office using CATI system
  - Conducted in May & June 2012

# Profiles of Participants

- Resident profile:

- 46 - median age
- No children living at home (60%)
- White (62%)
- Female (51%)
- Has an associate degree or higher
- Annual household income of \$41,000 (lower than Florida's median HH income of \$46,136 and U.S. median HH income of \$50,443)

- Business profile:

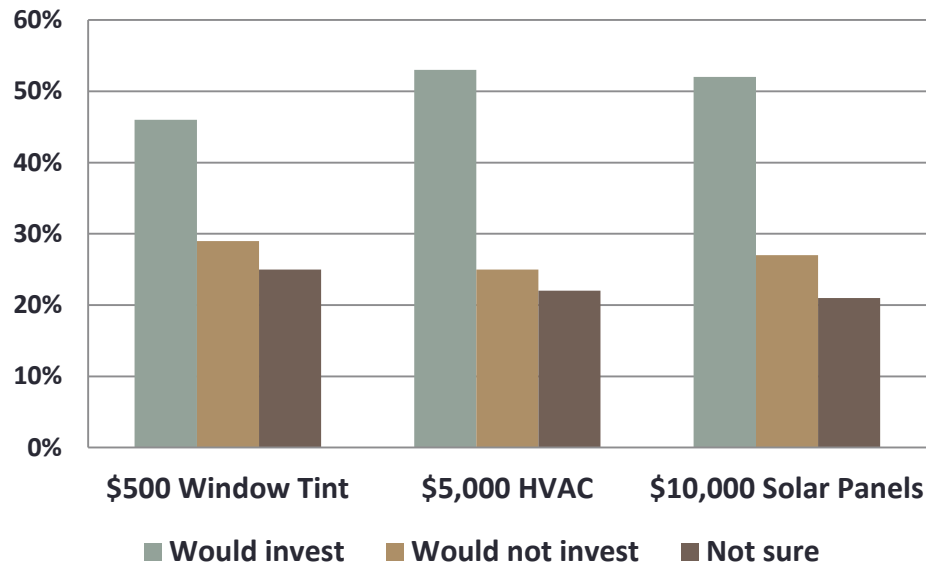
- The typical business had 4 employees
- 22% of businesses were office/professional
  - 17% retail
  - 9% service industry

# General Survey Trends

- A plurality of support for domestic or renewable energy, especially if it will enhance domestic energy security.
- A plurality of support for investing in energy conservation equipment, given appropriate payback periods.
- A majority of unwillingness to pay more for electricity just because it is derived from renewable energy sources.
- A strong majority consensus on the importance of state energy conservation and focus on domestic energy sources for energy security.

# Payback periods for energy saving investments

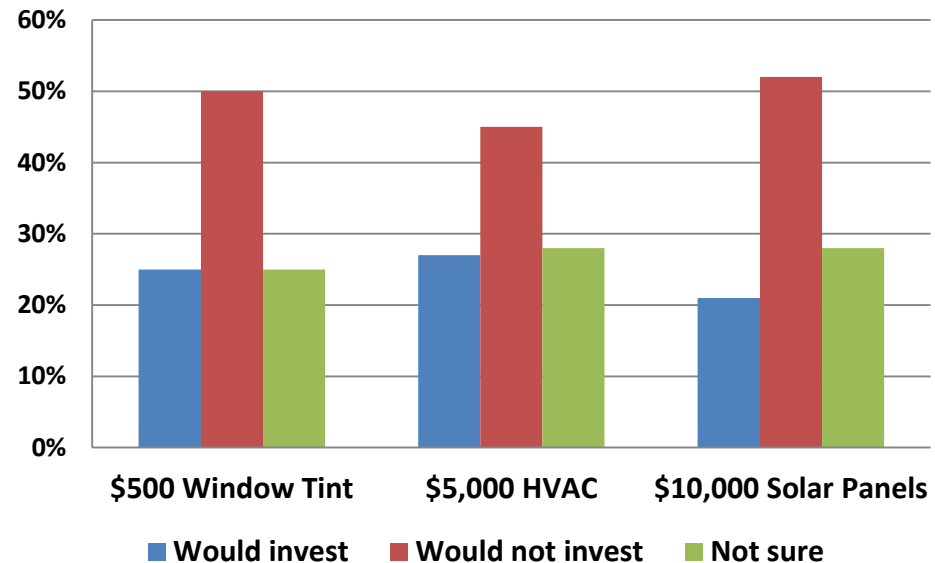
## Residential Surveys



For energy saving investments, pluralities of citizens would buy energy saving equipment depending on the payback period

- 46% would invest \$500 in window tinting
- 53% would invest \$5,000 in energy efficient heating and a/c systems
- 52% would invest \$10,000 in solar panels.

## Business Surveys



Unlike the residents surveyed:  
A plurality of businesses would **not** buy energy saving equipment regardless of the payback periods.

- 50% would not invest in \$500 in window tinting
- 45% would not invest in \$5,000 in energy efficient heating and a/c systems
- 52% would not invest in \$10,000 in solar panels

Note: Homeowners and Businesses that own their buildings are more willing to invest in all energy saving equipment than those who lease; individuals on long-term leases are slightly more likely to invest than individuals on short-term leases.

# Spending on energy saving equipment

- The “typical” individual would spend \$2,000\* on energy saving equipment
  - Among individuals who would spend for energy saving equipment, the average expenditure was over \$3,200
- The “typical” business would spend \$100\* on energy saving equipment
  - Among businesses that would spend for energy saving equipment, the average expenditure was over \$9,000
- Individuals and businesses would do the following with savings from energy saving equipment:
  - 40% of individuals and 49% of businesses - add to savings and investments
  - 24% of individuals and 29% of businesses - make improvements to house/building

\*50% of individuals would spend more than \$2,000, while 50% of individuals would spend less than \$2,000. 50% of businesses would spend more than \$100, while 50% of businesses would spend less than \$100.

# Impact of utility bill increases

- The typical resident had a monthly utility bill of \$150
  - The utility bill would have to increase \$70 per month for the typical resident to have to cut back on entertainment expenses
  - The utility bill would have to increase \$100 per month for the typical resident to make major lifestyle changes
- The typical business spends \$400 per month on heating and air conditioning and other non-transportation energy costs
  - Heating and air conditioning costs would have to increase 25% for the typical business to have to significantly increase the price of their products or services
  - Heating and air conditioning costs would have to increase 100% for the typical business to be forced to close

Note: 30% of businesses would NOT increase the price of their products or services; 39% of businesses would not close, regardless of rate increases.

## Impact of gas price increases on Residents

- The typical resident spent \$200 a month on gas
- 30% of EPA5 Residents spend \$301+ a month on gas
  - Gas expenditures would have to increase \$55 per month for the typical resident to have to cut back on entertainment expenses
  - Gas expenditures would have to increase \$100 per month for the typical resident to make major lifestyle changes
- Half of residents (51% state, and 48% EPA5) do not have a plan for keeping total energy costs stable if energy costs were to increase sharply



# Impact of gas price increases on Businesses

- The typical business spends \$500 per month on fuel costs for transportation
  - The typical business would have to significantly increase the price of their products or services if the price of fuel were \$5 per gallon
  - The typical business would be forced to close if the price of fuel were \$8 per gallon\*
- 34% of businesses have a plan for keeping costs for producing and delivering their products or services stable if energy costs were to increase sharply

\*38% of businesses do not use gas; 21% of businesses would not close regardless of the price of gas.

# Motivation for conserving energy

- Individuals and Businesses are motivated more by energy cost savings than by concern for the environment when purchasing energy conserving products
  - 39% of individuals and 36% of businesses are motivated by energy cost savings
  - 8% of individuals and 10% of businesses are motivated by a concern for the environment
  - A plurality of individuals (47%) and businesses (42%) say they are equally motivated by costs savings and by concern for the environment

## Utility rates & utility costs

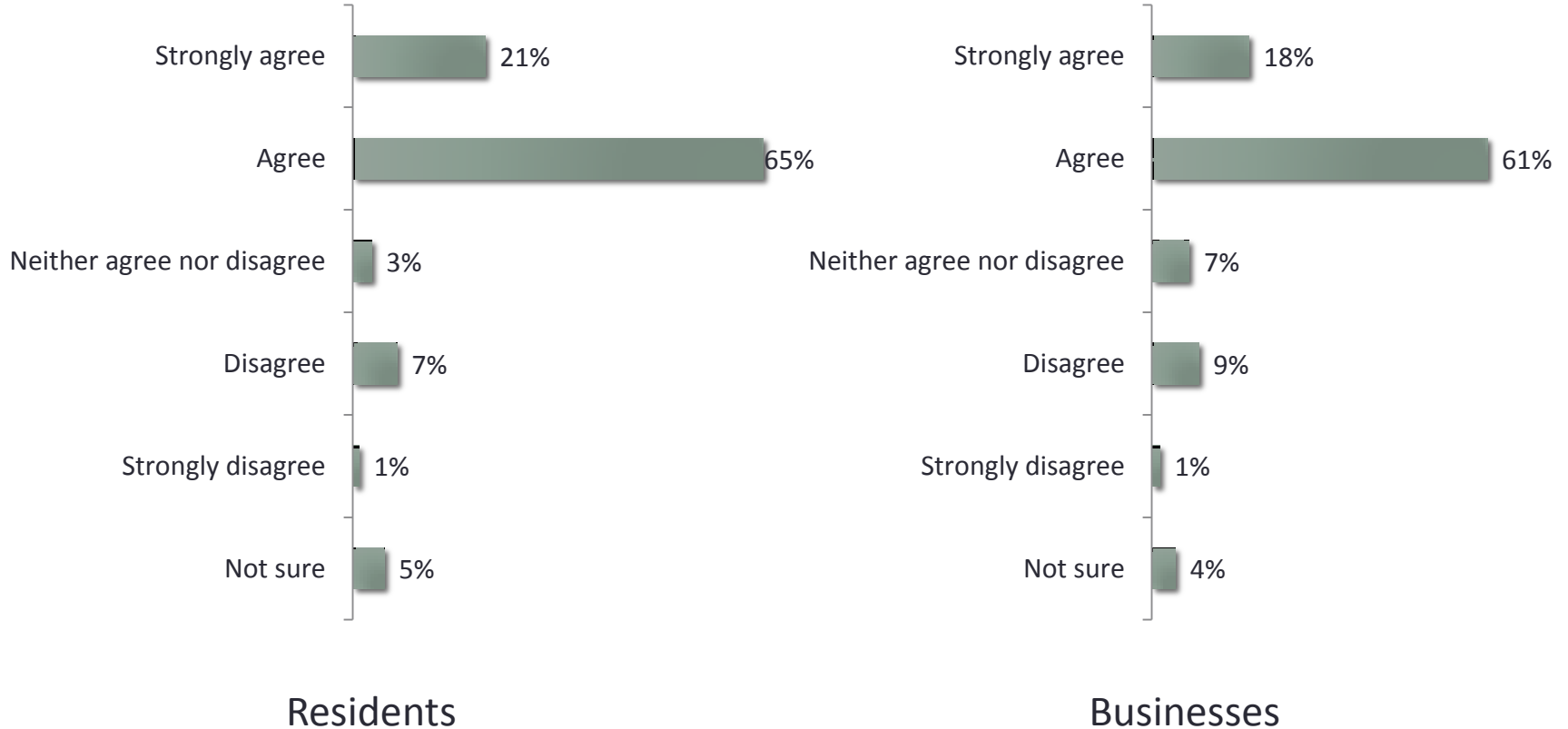
- 18% of residents and 54% of businesses answered that they have been paying higher energy rates because their utility company uses alternative & renewable energy sources
- 32% (39% EPA5) of residents are willing to pay higher utility rates for their utility company to use renewable or alternative energy sources
- 33% (37% EPA5) of businesses are willing to pay higher utility rates for their utility company to use renewable or alternative energy sources

# Renewable/Alternative energy

- 54% (59% EPA5) of residents and 47% (60% EPA5) of businesses support government mandating that utility companies use a certain amount of renewable or alternative energy
  - 56% of residents and 59% of businesses are willing to pay 5-10% higher rates for the mandate
- 45% (49% EPA5) of residents and 43% (45% EPA5) of businesses are willing to pay higher utility rates for the utility company to use only energy that is produced in the United States
  - Of residents and businesses willing to pay more, the majority would be willing to pay 5-10% more

# Energy policy

The state of Florida should take a more active role in promoting energy conservation.



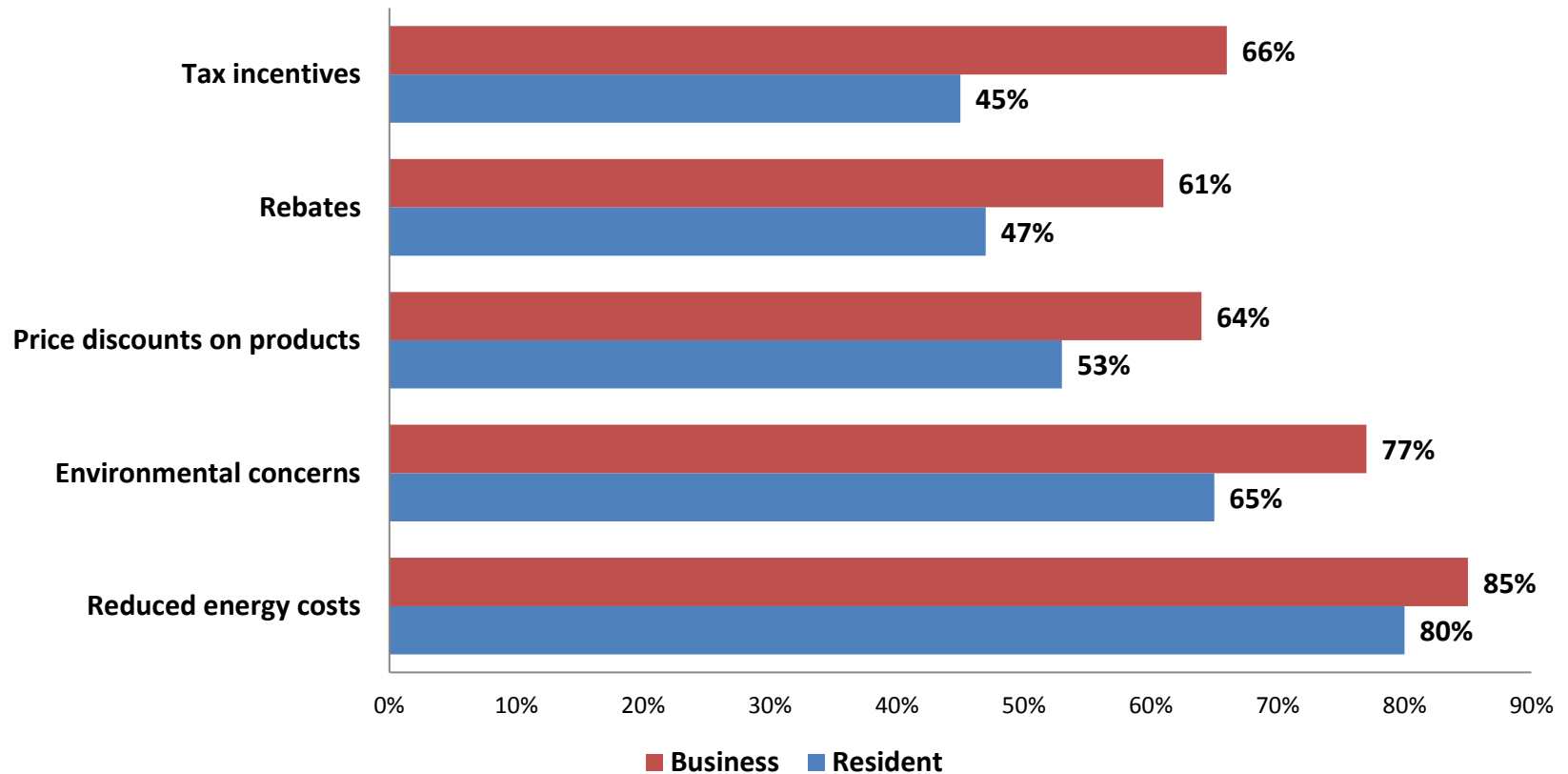
86% of residents and 79% of businesses agree that the state of Florida should take a more active role in promoting energy conservation

## Energy policy

- 88% of residents and 86% of businesses agree that there should be more focus on domestic energy sources and less focus on foreign energy sources
- 67% of residents and 56% of businesses agree that government buildings should be required to use renewable or alternative energy
- 55% of residents and 48% of businesses support government requiring utility companies to match renewable or alternative energy sources to geographic suitability

# Energy policy

- Motivations for using alternative energy or renewable sources:



# Energy policy: Support for methods of promoting energy conservation and use of alternative energy

