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VIA RESS and EMAIL

May 27, 2020

Ms. Christine Long
Board Secretary
Ontario Energy Board
2300 Yonge Street, 27th Floor
Toronto, Ontario
M4P 1E4

Dear Ms. Long:

Re: EB-2020-0066 – Enbridge Gas Inc. (“Enbridge Gas”) – Voluntary Renewable Natural Gas (“RNG”) Program Application

Enbridge Gas has become aware of an error in the pre-filed evidence supporting its Voluntary RNG Program application. Please find attached a correction to the affected evidence. A summary of the evidence correction has been provided below.

Location in Plan	Description
Exhibit C, Tab 4, Schedule 1	The Header was incorrectly labeled as Exhibit C, Tab 2, Schedule 1

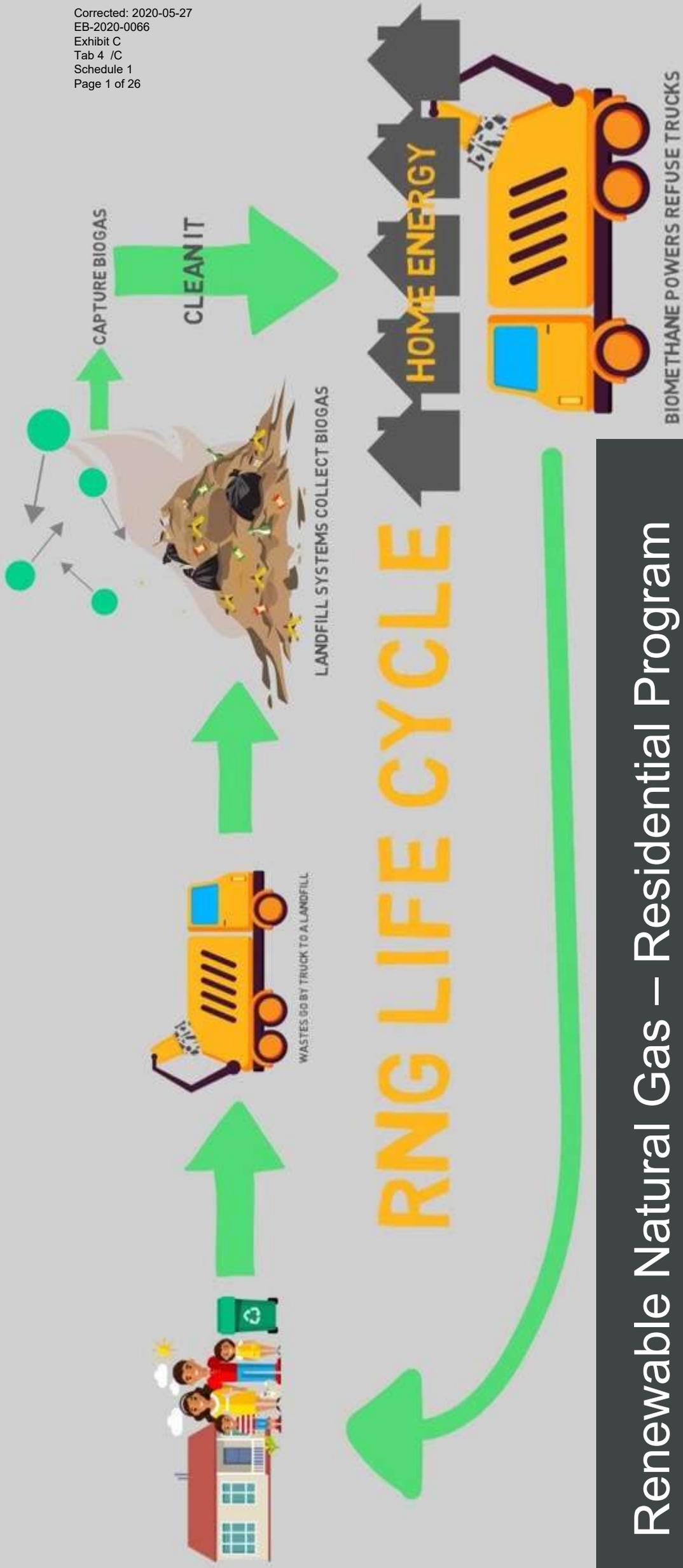
Should you have any questions on this matter please contact the undersigned.

Sincerely,

(Original Signed)

Brandon Ott
Technical Manager, Regulatory Applications

Cc: David Stevens, Aird & Berlis LLP
All Interested Parties EB-2020-0066



Renewable Natural Gas – Residential Program

Ontario Results – Report

Objectives & Methodology

Objectives

- The overall objective of the research is to gauge awareness of and interest in renewable natural gas initiatives among Ontario's natural gas customers. More specifically the research focuses on understanding customer ...
 - Awareness of, and opinions about, renewable natural gas (RNG)
 - Willingness to pay for RNG projects (e.g. absolute maximum monthly payment, interest in different set-ups)
 - Preferences for program design options (e.g. determine interest in a voluntary program, length of program, etc.)
 - Attitudes toward the environment, as well as the utility brand

Methodology

- Online research was conducted by Ipsos Public Affairs from December 12-19, 2018 with Legacy EGD and Legacy UG residential customers
- In total, 1212 customers participated in the survey:

Total	Legacy Enbridge (EGD)	Legacy Union Gas (UG)
1212	720	492

- Survey respondents are a representative sample of customers according to age, region and gender
- Only those customers who are fully or jointly responsible for decisions associated with their natural gas service are included in the sample of completed interviews

Key Findings

- Customers are quite **concerned about the cost of energy** (92%), but also **the environment** (86%), with the majority of customers indicating that they would be at least somewhat likely to pay a premium for environmentally friendly products (i.e. household products, electronics, clothing, natural gas, electricity, and other fuels)
- General **awareness of RNG** is quite high as the majority of customers (76%) indicate that they are at least a little aware of RNG – though few indicate that they are very aware (8%), leaving room for much more education on the product
- Once provided an explanation, customers show **support for investments in RNG** projects by Enbridge and Union Gas (89%) – support for RNG is also evident in perceptions of the importance of RNG in diverting waste, helping the environment, and supporting local investment
- Though generally in support (60%), customers are a little less sure (14% don't know) about a program that would have customers help pay for RNG investments, however, once provided with more details, customers provide their further feedback:
 - Without any cost consideration, **customers have a mix of preferences** – some would prefer a voluntary program (20%), while others prefer a mandatory program (27%), and yet again others a combination of the two (33%) – another 12% oppose any program
 - Once adding cost as a consideration, customers show equal amounts of **support for each of the program options** presented (68%, 65%, 70% for a \$2/month voluntary program, a \$2/month mandatory customer-wide program, and a voluntary round-up your bill program, respectively) – support declines significantly as the monthly cost increases, suggesting that customers care more about the total monthly cost than the specific design of the program
 - **Just over half (52%) of all customers support all three programs** – a version of the voluntary program (\$2, \$10 and/or \$20/month), the mandatory program (\$2/month), and the voluntary round-up program
 - Between 57% and 59% of all customers support two of the three types of programs
 - On the flip side, **17% of all customers offer no support** to any of these three types of programs (slightly less than the 24% of customers who indicate that they are not willing to pay anything for RNG)

Key Findings cont'd

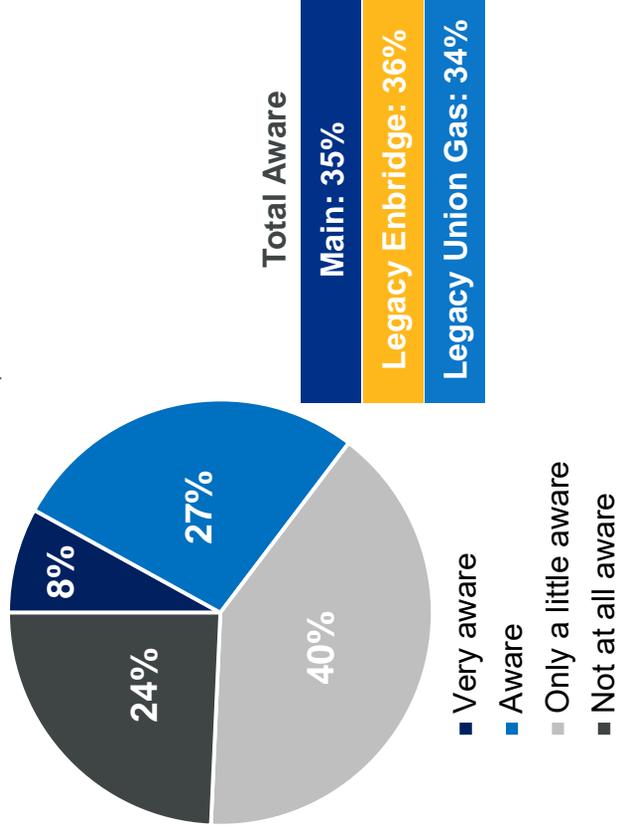
- A sizeable group of customers express their **strong support and a high likelihood** of signing-up within the next month for a voluntary program, suggesting there is a good base of support for a voluntary program:
 - 25% at \$2/month for 2% RNG (by comparison, unaided, 36% of all customers said they would pay a maximum of at least \$2/month for 2% RNG)
 - 11% at \$10/month for 5% RNG (unaided, 20% said they would pay at least \$10/month for 5% RNG)
 - 6% at \$20/month for 10% RNG (unaided, 11% said they would pay at least \$20/month for 10% RNG)
- When it comes to program design, customers tend to **prefer a variable charge** (with a cap) over a fixed monthly charge (similar to a GHG offset purchase)
- Customers also prefer a **shorter agreement** (in years), indicating they are more likely to consider a program where the agreement terms are 1 or 2 years (there is little difference) compared to 5 or 10 years – note that customers who prefer a mandatory program are more receptive to agreement terms altogether
- The Legacy Enbridge Gas and Legacy Union Gas brand have an impact – those who have a strong impression of their utility are more likely to support an RNG program
- Altogether, customers who are younger, located in urban areas, with some awareness of RNG, and strong views towards the environment are most receptive to Enbridge Gas implementing an RNG program

Awareness of RNG

- Just over 1-in-3 customers are “very aware” or “aware” of RNG (similar to previous customer research)
- Awareness is slightly higher in Toronto (compared to the rest of the province) and among males as well as younger customers

Awareness of RNG

(base: EGD and UG customers, n=1212)



	Total Aware		Total Aware
View of Environment			
Critical issue (n=380)	42%	Legacy Enbridge Gas	
Significant issue (n=387)	33%	Toronto (n=173)	44%
One of many issues (n=348)	30%	Central West (n=173)	33%
Not an issue (n=81)	44%	Central East (n=202)	34%
Household Income			
Less than \$40K (n=174)	33%	Eastern (n=115)	38%
\$40K-less than 80K (n=388)	33%	Niagara (n=58)	27%
More than \$80K (n=514)	40%	Legacy Union Gas	
Age of Consumer			
18-34 (n=101)	45%	Northern (n=84)	35%
35-54 (n=439)	38%	Eastern (n=39)	35%
55-64 (n=287)	27%	Southwestern (n=152)	33%
65+ (n=384)	36%	Central (n=217)	34%
Gender			
		Male (n=654)	45%
		Female (n=558)	24%

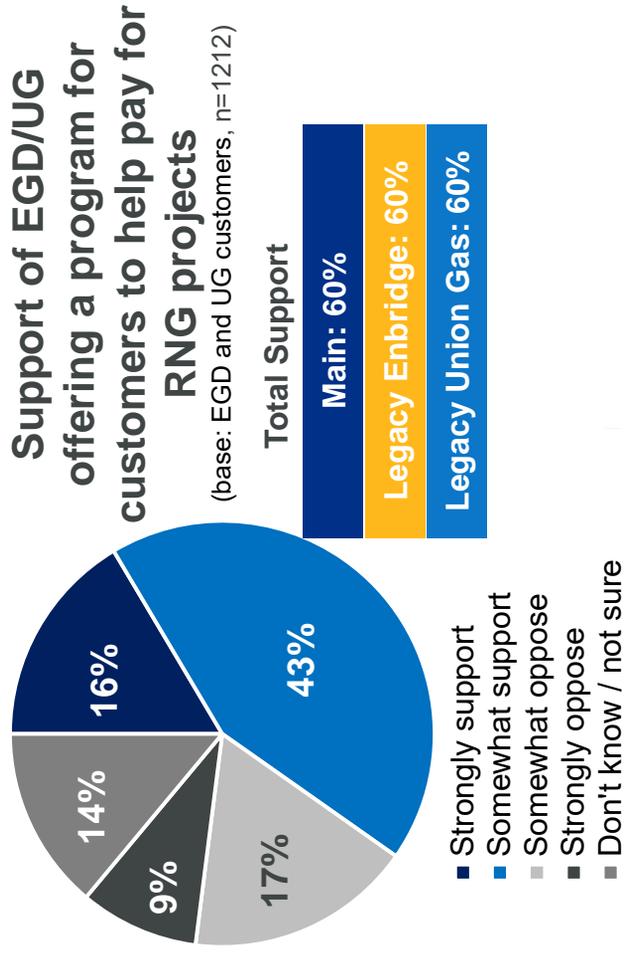
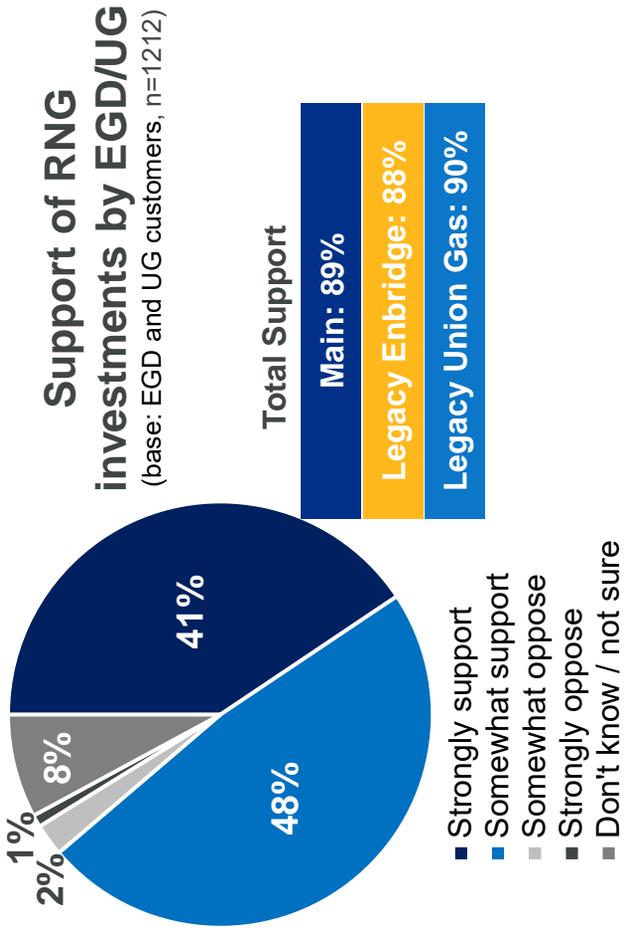
Q: How aware would you say that you are about renewable natural gas, this is sometimes also referred to as bio methane

Support of RNG investments and projects

- After being provided a brief explanation of RNG, the majority of customers indicate support for their natural gas utility investing in RNG projects (almost 9-in-10 customers offer support!)
- Customers were a little less, but still, supportive (60%) of their utility offering a program that would allow customers to help pay for RNG projects – though a sizable group were not sure (14%)



Renewable natural gas is natural gas produced from organic waste from farms, forests, landfills, and water treatment plants. The gas can be captured, cleaned, and injected into traditional natural gas pipelines for use by customers like you. Renewable natural gas has similar environmental benefits as renewable or green electricity and would help you to reduce your greenhouse gas emissions by displacing traditional natural gas. Introducing renewable natural gas is a safe and reliable way for Ontarians to turn waste products into a useful energy source and lower greenhouse gas emissions at the same time.



Reasons for support / opposition

- Reasons for support are predominantly focused on the environment and concern for future generations, while reasons for opposition focus on concerns with increased costs (especially among lower income customers) and who should bear the responsibility

Main Reasons for Support (*unaided*)

(base: all who support a program that allows residential customers to help pay for renewable natural gas projects, n=724)

Good/ better for/ helps the earth/ environment/ health of the planet	38%
Switch to an alternative/ renewable source of heat/ energy	11%
For the future/ next generation	11%
To reduce impact of climate change	8%
Reduces costs/ saves us money (in the future)	8%
Reduce/ re-use/ recycle (energy/ waste)	7%
It's important/ necessary (for everyone)	6%
Does not deplete resources/ sustainability	4%

Main Reasons for Opposition (*unaided*)

(base: all who oppose a program that allows residential customers to help pay for renewable natural gas projects, n=319)

Cannot afford increased costs (for energy/ heat)	37%
Corporations/ governments should be paying for this/ not the public	29%
Current price/ cost/ tax is too high	21%
Need more information/ research	5%
Top corporate employees are overpaid/ have too many benefits	4%
Don't want to pay for it	3%

Type of RNG program

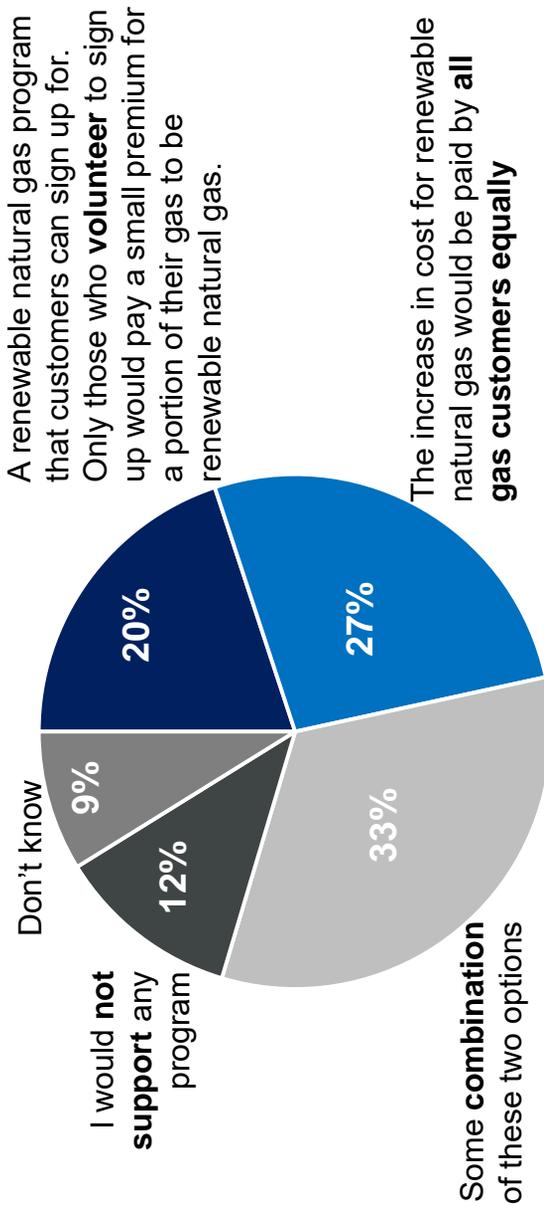
- Customer preference for the type of RNG program is mixed ... 1-in-5 customers prefer a voluntary program (which is slightly higher among younger customers), while just over 1-in-4 prefer a mandatory program (akin to a rate increase) and 1-in-3 prefer some sort of combination of these options
- Just 12% indicate that they would not support any program at all (this is noticeably lower among younger customers at 3%)



The cost of renewable natural gas is greater than the cost of traditional natural gas. The additional costs for a renewable natural gas program can be paid by consumers in different ways.

Type of RNG Program

(base: EGD and UG customers, n=1212)



	By customer age			
	18-34 (n=101)	35-54 (n=439)	55-64 (n=287)	65+ (n=384)
A renewable natural gas program that customers can sign up for. Only those who volunteer to sign up would pay a small premium for a portion of their gas to be renewable natural gas	32%	25%	18%	12%
The increase in cost for renewable natural gas would be paid by all gas customers equally	31%	21%	26%	32%
Some combination of these two options	28%	33%	36%	33%
I would not support any program	3%	10%	11%	16%
Don't know	6%	11%	8%	8%

Q: Which way would you prefer to see [EGD/UG] offer this program, if it were to do so? A renewable natural gas program that customers can sign up for. Only those who volunteer to sign up would pay a small premium for a portion of their gas to be renewable natural gas. / The increase in cost for renewable natural gas would be paid by all gas customers equally. / Some combination of these two options. / I would not support any program.

Unaided willingness to pay (monthly)

- Responses provide a good initial read on the price expectations that customers have, though levels of “don’t know” indicate that customers are generally unsure
- 24% of customers are not willing to pay anything (thereby suggesting they are not very receptive to any program)
- Customers offer a wide range of values when indicating the maximum monthly premium they are willing to pay, and generally increase their amount as the % of RNG increases

- 47% of all customers willing to pay something, or 36% of all customers say they would be willing to pay at least \$2/month for 2% RNG
- 26% of all customers willing to pay something, or 20% of all customers say they would be willing to pay at least \$10/month for 5% RNG
- 15% of all customers willing to pay something, or 11% of all customers say they would be willing to pay at least \$20/month for 10% RNG

Customers who specifically prefer...
 Voluntary program (n=246): \$16.25
 Mandatory program (n=322): \$20.55

Range of Prices mentioned (unaided) <i>accepted responses from 0-99</i>	No % RNG consideration All customers (n=1212)	2% RNG	5% RNG	10% RNG	50% RNG
\$0 / not willing to pay anything	24%	4%	3%	2%	2%
\$1	1%	6%	3%	2%	2%
\$2	2%	8%	6%	3%	2%
\$3 to \$4	1%	3%	3%	4%	2%
\$5	9%	14%	14%	10%	10%
\$6 to \$9	1%	1%	5%	4%	2%
\$10	14%	10%	9%	13%	13%
\$11 to \$15	4%	3%	5%	5%	6%
\$16 to \$20	7%	1%	4%	6%	9%
\$21+	8%	7%	8%	9%	15%
Mean (excl. 0) [median]	\$17.21 [\$10]	\$12.22 [\$5]	\$13.16 [\$7]	\$14.82 [\$10]	\$18.93 [\$12]
Don't know / not sure	30%	41%	40%	40%	39%

All customers willing to pay something at no % consideration (n=928)

Q: What would you say is the absolute maximum amount of money you would pay as a premium, or extra per month, to ensure that a proportion of the natural gas used in homes and businesses in Ontario is renewable natural gas?

Voluntary RNG program offering

- Customers are quite supportive of a voluntary program at \$2/month for 2% RNG with 1-in-4 indicating strong support and a strong likelihood of participation (indicators for substantial support), but support decreases significantly as the offering becomes more expensive

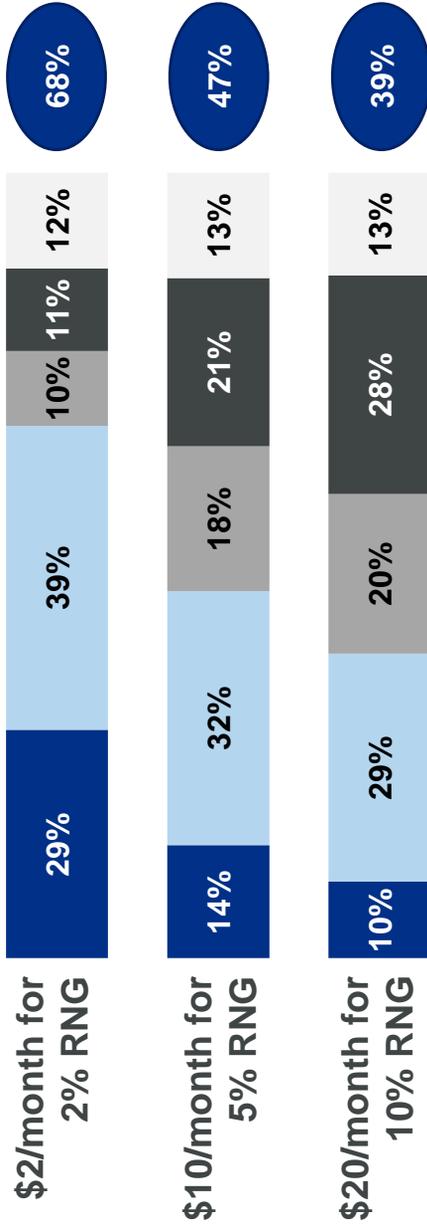


Investing in renewable natural gas can start with modest levels of blending renewable natural gas with conventional natural gas. Over time, it is expected the cost of renewable natural gas will decline, making renewable natural gas less expensive than it is today.

Reaction to voluntary program that costs [\$] and ensures [%] of the natural gas used is RNG

(base: EGD and UG customers, n=1212)

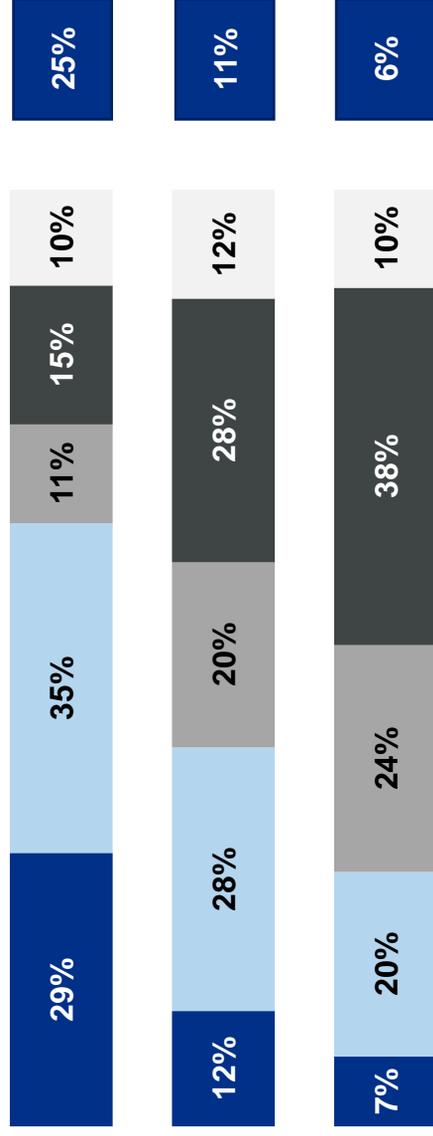
■ Strongly support
 ■ Somewhat support
 ■ Somewhat oppose
 ■ Total Support
■ Strongly oppose
 ■ Don't know / not sure



Likelihood to sign-up for this program within the next month

(base: EGD and UG customers, n=1212)

■ Very likely
 ■ Somewhat likely
 ■ Not very likely
■ Not at all likely
 ■ Don't know / not sure



Q: Knowing this, would you support or oppose a voluntary program that you can choose to register for that costs [INSERT \$] for the benefit of knowing that [INSERT %] of the natural gas you use is from renewable sources?
 Q: If this program were offered today, how likely would you be to sign-up for this program that costs [INSERT \$] extra per month within the next month?

Voluntary RNG program offering – by key groups

- Support for a voluntary program (at all \$ amounts) is much stronger among those who are already very aware of RNG, think the environment is at least a significant issue, and are younger (age 18-34)
- Those who had an initial preference for a mandatory program provide greater support to voluntary programs (once costs are considered) compared to those who preferred a voluntary program to start with – the \$2/month program gains some support from customers who initially reported no support for any program indicating some receptivity at this price level

Reaction to voluntary program that costs \$[] and ensures [%] of the natural gas used is RNG (base: EGD and UG customers, n=1212)

Total Support (Strong/Somewhat)	Aware of RNG				View of Environment				Initial Preference				Age			
	Very Aware (n=97)	Aware (n=331)	Only a little (n=489)	Not at all (n=294)	Critical issue (n=380)	Significant issue (n=387)	One of many issues (n=348)	Not an issue (n=81)	Voluntary (n=241)	Mandatory (n=323)	Some Combination (n=400)	No Support (n=140)				
\$2/month for 2% RNG	68%	77%	71%	69%	59%	76%	75%	56%	45%	66%	83%	22%	80%	67%	68%	66%
\$10/month for 5% RNG	47%	64%	53%	45%	37%	62%	50%	32%	26%	49%	62%	5%	60%	44%	49%	44%
\$20/month for 10% RNG	39%	54%	47%	35%	31%	52%	41%	28%	21%	40%	50%	3%	56%	39%	37%	36%

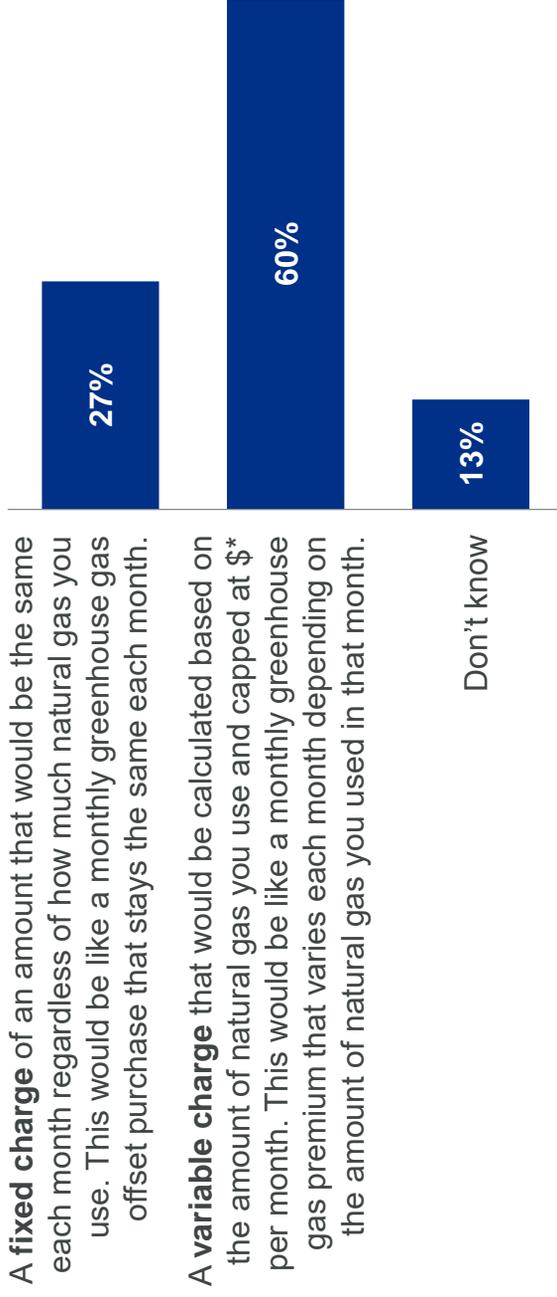
Q: Knowing this, would you support or oppose a voluntary program that you can choose to register for that costs [INSERT \$] for the benefit of knowing that [INSERT %] of the natural gas you use is from renewable sources?

Program design elements

- Customers tend to support a variable charge (with some cap) over a fixed charge
- The cap on the variable charge ranges from \$5 to \$20 (according to previously stated support for a voluntary program), but regardless of this amount support for a variable charge stays ahead of a fixed charge
- Customers indicate a greater likelihood of support for a program that has a 1-year or 2-year agreement term (compared to longer terms)

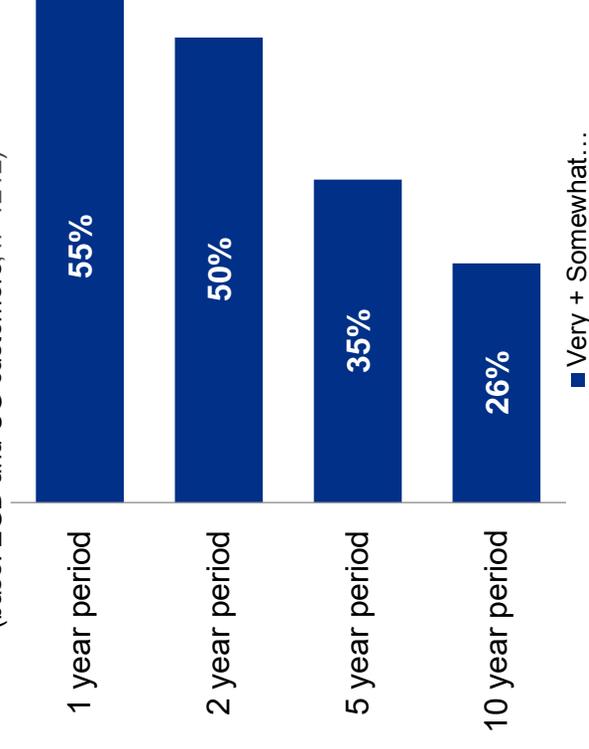
Type of Charge

(base: customers who support a voluntary program, n=945)



Likelihood of considering a voluntary agreement over the following terms ...

(base: EGD and UG customers, n=1212)



■ Very + Somewhat...

By Type of RNG Program Preference

Voluntary (n=241)	Mandatory (n=323)
58%	69%
51%	67%
34%	49%
29%	34%

* Cap shown is \$20, \$10 or \$5 based on level of support for a voluntary program at a cost equivalent (or near) that amount.

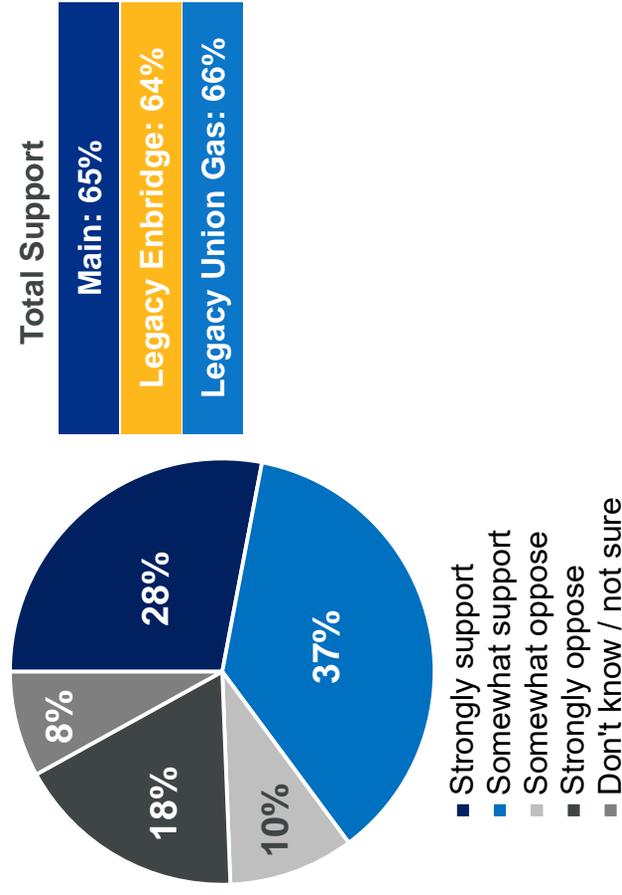
Q: If it were to do so, which way would you prefer to see [EGD/UG] charge a voluntary premium in support of renewable natural gas projects? Please read these options carefully. Q: How likely would you be to consider a voluntary agreement where you would pay a voluntary premium in support of renewable natural gas, where the terms of agreement were over a ...

Other program offerings

- Customer support for a customer-wide mandatory program and voluntary “round-up for renewables” program are quite similar to each other with over 1-in-4 customers offering strong support for these types of programs (support is also similar to a voluntary program at \$2/month, which sees 68% total support)

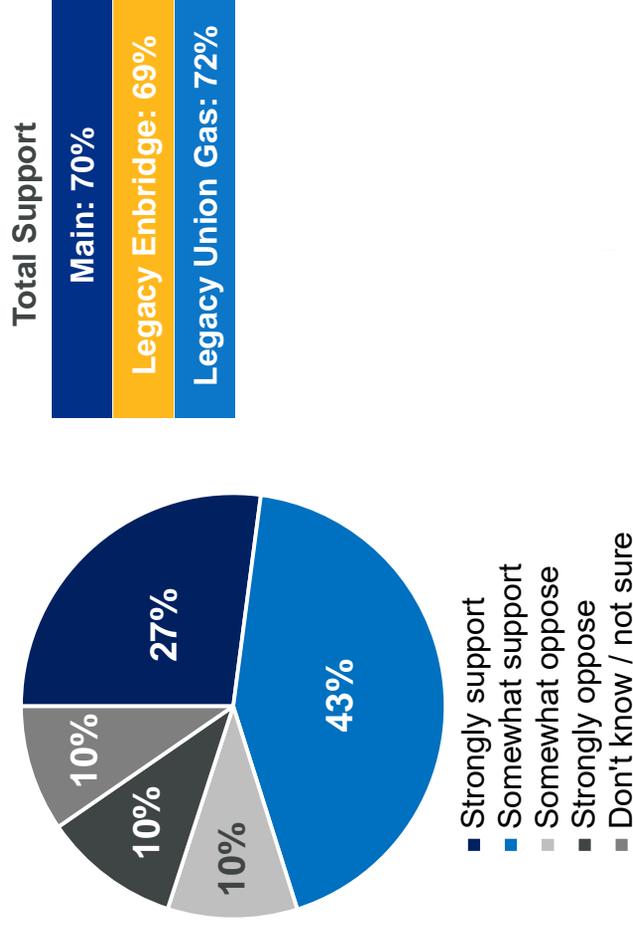
Customer-wide program that requires all customers to pay an additional \$2/month

(base: EGD and UG customers, n=1212)



Voluntary program of “Round-up for Renewables”

(base: EGD and UG customers, n=1212)



Q: Alternatively, rather than offering a voluntary program, [EGD/UG] can ask all its customers to pay an additional \$2.00 per month in a customer-wide program in support renewable natural gas. Would you support or oppose this program? Q: Or as a different option, would you support or oppose a voluntary program that would allow you to register to round up your bill to the nearest dollar each month, in support of renewable natural gas projects?

Other program offerings – by key groups

- Support for a mandatory and voluntary round-up program is not impacted by awareness of RNG as much as the voluntary program is, though support for each of these program offerings is similarly higher among those who think the environment is a critical issue and are younger
- Those who preferred a mandatory program without considering costs continue to support a mandatory program at \$2 a month; they are equally supportive of the round-up program while support among those who preferred a voluntary program is much lower for either of these program options – those who would not support any program are more receptive to the voluntary round-up program

Reactions to other program offerings

(base: EGD and UG customers, n=1212)

	Aware of RNG				View of Environment			Initial Preference			Age						
	Total (n=1212)	Very Aware (n=97)	Aware (n=331)	Only a little (n=489)	Not at all (n=294)	Critical issue (n=380)	Significan t issue (n=387)	One of many issues (n=348)	Not an issue (n=81)	Voluntary (n=241)		Mandatory (n=323)	Some Combinatio n (n=400)	No Support (n=140)	18-34 (n=101)	35-54 (n=439)	55-64 (n=287)
Customer-wide program that requires all customers to pay \$2/month	65%	67%	67%	65%	62%	79%	71%	52%	34%	50%	89%	79%	18%	76%	61%	63%	68%
Voluntary program of “Round-up for Renewables”	70%	74%	71%	74%	63%	81%	76%	60%	42%	69%	84%	79%	32%	76%	67%	72%	71%

Q: Alternatively, rather than offering a voluntary program, [EGD/UG] can ask all its customers to pay an additional \$2.00 per month in a customer-wide program in support renewable natural gas. Would you support or oppose this program? Q: Or as a different+ option, would you support or oppose a voluntary program that would allow you to register to round up your bill to the nearest dollar each month, in support of renewable natural gas projects?

Change in program support

- Customers may change their level of support or opposition – for a residential RNG program offering to help pay for RNG projects – once further information or program details are provided
 - Support for an RNG program increases by 17% (at the same as decreasing by 14%) for a \$2/month voluntary program – levels of support dwindle fast at higher monthly costs (as aggregate results also show)
 - Support for a round-up program increases slightly more at 22% but at the same time decreases by 17%
 - A majority do not change their initial reaction to a program, suggesting that the specific type of program does not sway majority opinion

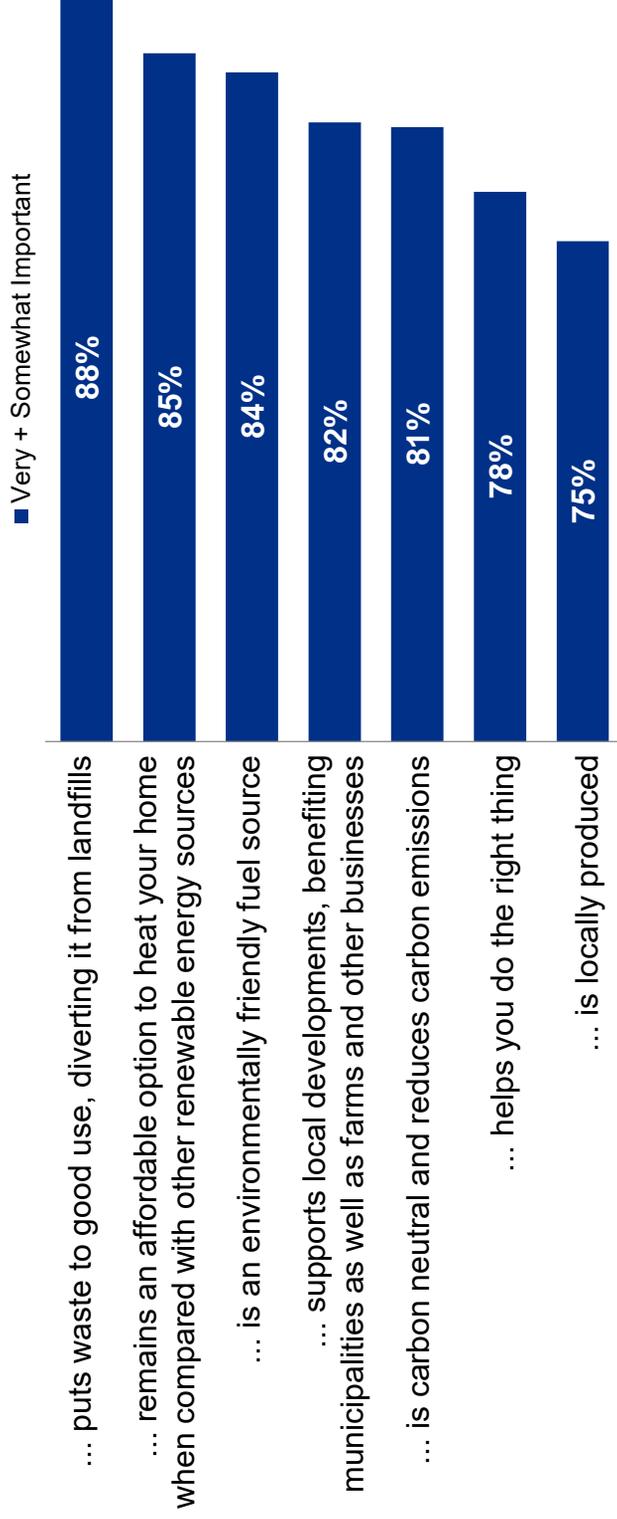
Change in support/opposition to a specific program from initial reaction (at a respondent-level)	Support for EGD/UG offering a program for customers to help pay for RNG projects	Support for any of the voluntary program options			Support for a voluntary program of “Round-up for Renewables”	Support for mandatory program that requires all customers to pay an additional \$2/month
		\$2	\$10	\$20		
Total (n=1212)	60%	68%	47%	39%	70%	65%
Decrease (Support or Not Sure → Oppose)		14%	29%	37%	17%	16%
Same (Support → Support or Oppose → Oppose)		63%	59%	52%	58%	64%
Increase (Oppose or Not Sure → Support)		17%	7%	7%	22%	16%
Not Sure (both)		5%	5%	5%	3%	3%

RNG positioning statements

- A series of positioning statements indicate what is important to customers ... all statements are met with strong support with RNG putting “waste to good use, diverting it from landfills” and remaining “an affordable option to heat your home when compared to other renewable energy sources” getting the highest importance ratings

Important that Renewable Natural Gas ...

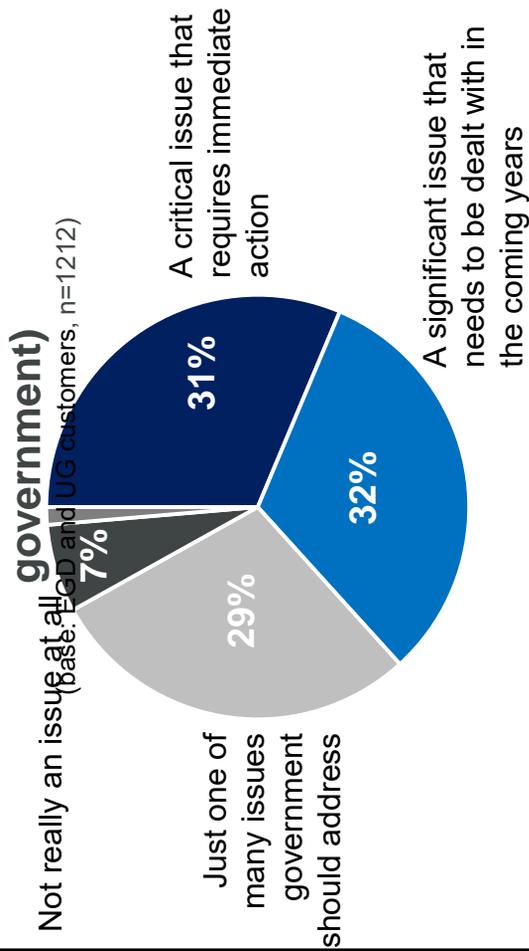
(base: EGD and UG customers, n=1212)



Concern with the environment

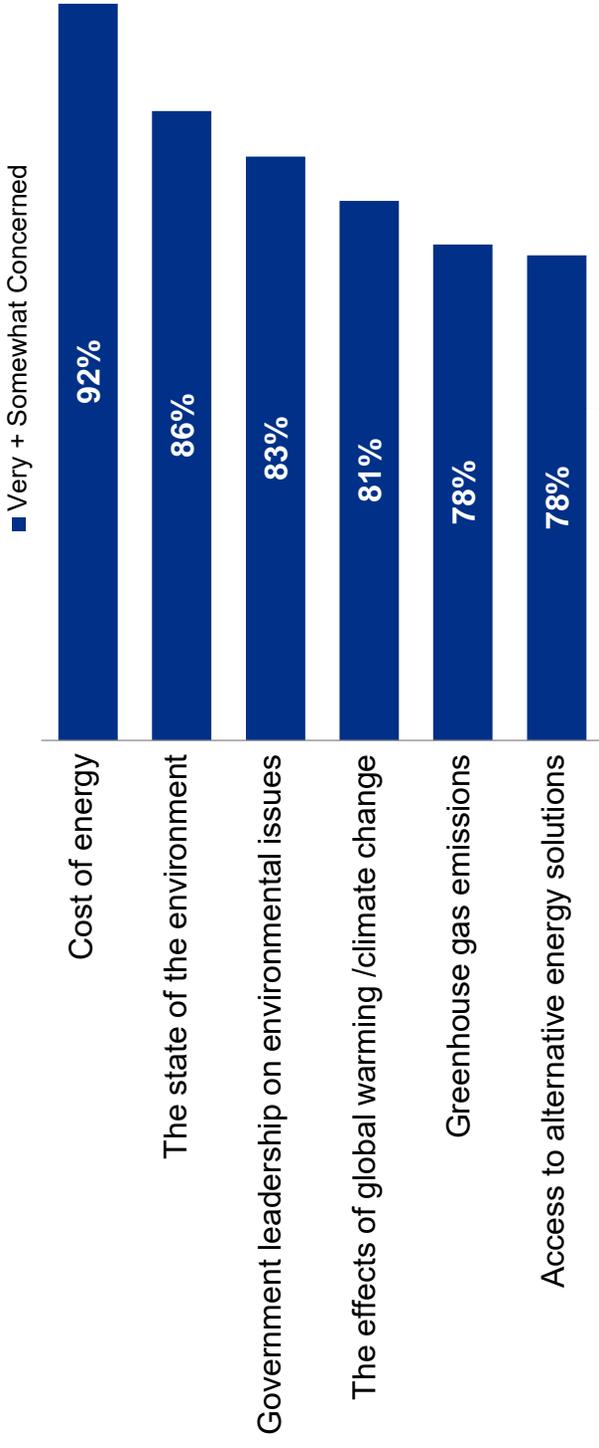
- Similar to previous research, almost 2-in-3 customers think the environment is at least a significant issue (this is consistent across Legacy EGD and UG customers)
- Among issues of potential concern, almost all (92%) customers indicate that they are least somewhat concerned with the cost of energy (followed by the state of the environment) – these are also the reasons that customers either oppose or support an RNG program

Importance of the Issue of the Environment (of all issues facing the government)



Concern with Specific Issues

(base: EGD and UG customers, n=1212)



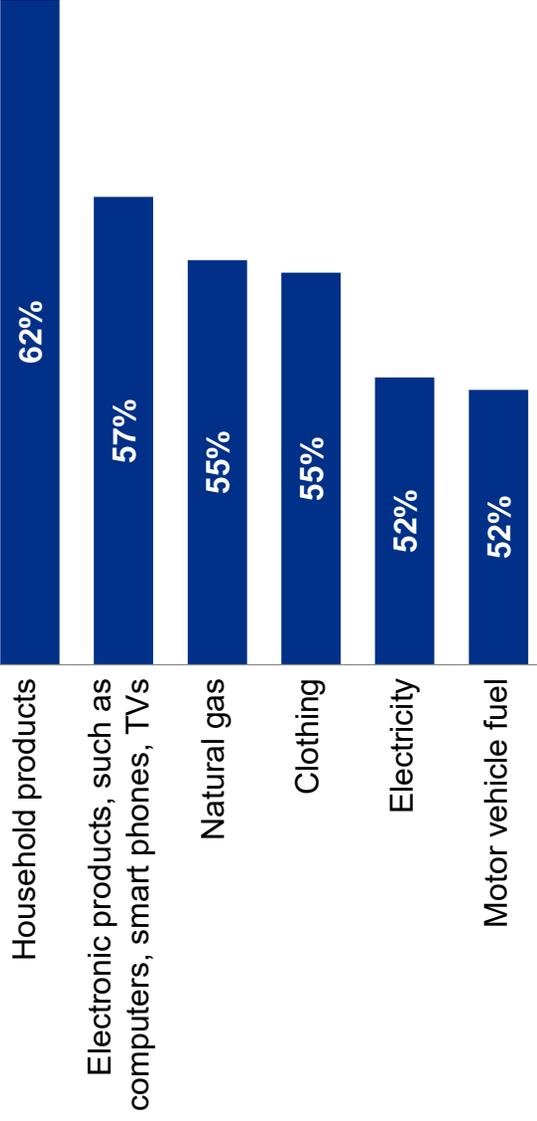
Paying more for environment

- The majority of customers indicate that they would be willing to pay a premium for products that are environmentally friendly
- Those willing to pay more for environmentally friendly options for each of these products are more likely to support each of the types of programs, and are generally willing to pay more for RNG – these customers are an important target market for an RNG program

Likelihood to purchase environmentally friendly option for premium price (approx. 10% more)

(base: EGD and UG customers, n=1212)

■ Very + Somewhat Likely

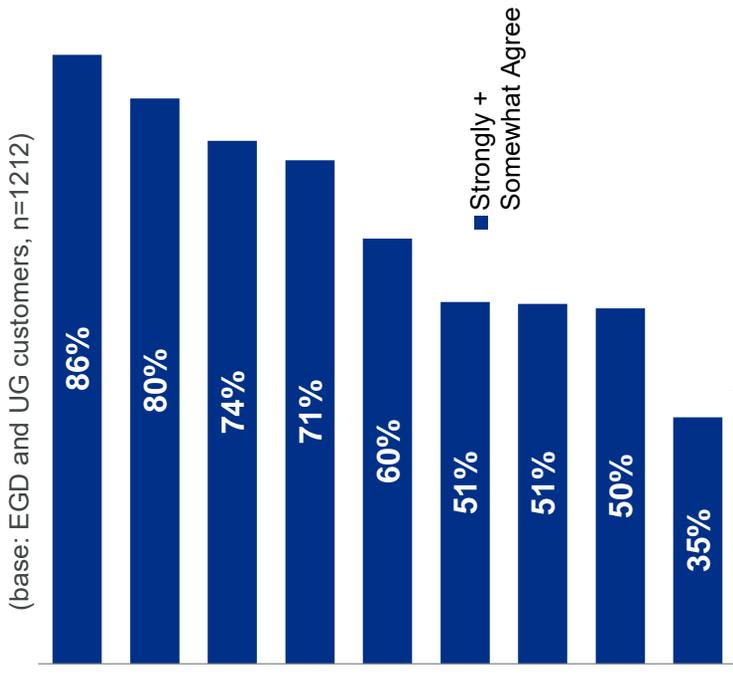


Program Support – for those willing to pay environmental premium

	Some Program Support	Any Voluntary Program Support	Mandatory Program Support	Round-Up Program Support	Max. Willing to Pay (No % RNG) Mean	Not willing to pay anything (No % RNG)
Total (n=1212)	60%	71%	70%	65%	\$17.21	24%
	72%	83%	79%	77%	\$18.97	10%
	73%	83%	81%	77%	\$18.82	10%
	76%	85%	81%	81%	\$19.94	8%
	74%	84%	80%	79%	\$19.13	10%
	76%	85%	80%	81%	\$20.60	9%
	75%	85%	81%	81%	\$20.27	9%

Attitudinal Statements

- Customers acknowledge that energy is important, but also express a concern for the environment (and need for action, including a change in behaviour)
- While customers have expressed concern for the cost of energy, few agree with the statement “I don’t care where we get energy from so long as it is at the lowest price”



Energy is such a fundamental necessity of modern life that access to affordable, reliable energy should be a basic right of citizenship

The environment is at a critical crossroad and we need to do everything we can do to protect it

I am prepared to change my behaviour significantly in order to make progress in addressing climate change

The human race has become an environmental plague on this planet

Our communities need to continue to grow if we want to sustain our quality of life

When we have to choose between jobs and the environment, I believe we should always put the environment first

What is good for business is usually bad for the average person
 I am willing to pay more money for many day-to-day products in order to help address environmental problems facing society today

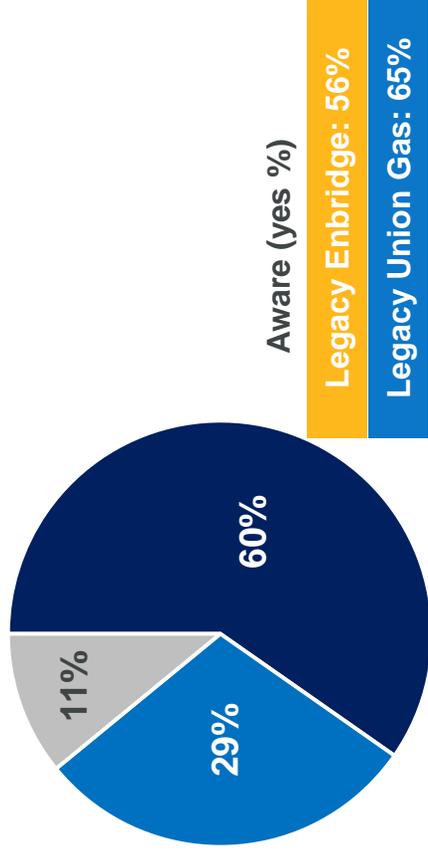
I don't care where we get energy from so long as it is at the lowest price

Awareness of EE programs & incentives

- 3-in-5 customers are aware that their natural gas utility offers energy efficiency (EE) or conservation programs and among them just over 1-in-3 have participated in such a program
- Customers who have previously participated in an EE program tend to be more supportive of the different RNG programs compared to those who have not, especially the voluntary program

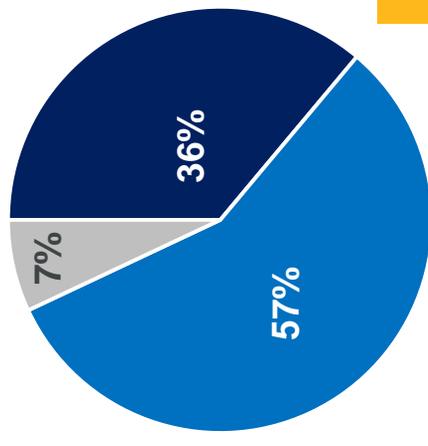
Aware that EGD/UG offers EE programs & incentives

(base: EGD and UG customers, n=1212)



Ever participated in EE program offered by EGD/UG

(base: aware that EGD/UG offers programs, n=723)



Ever participated ...	Some Program Support	Any Voluntary Program Support	Mandatory Program Support	Round-Up Program Support
Total (n=1212)	60%	71%	70%	65%
Yes (n=261)	67%	77%	70%	75%
No (n=412)	58%	67%	61%	70%

■ Yes ■ No ■ Don't know / not sure

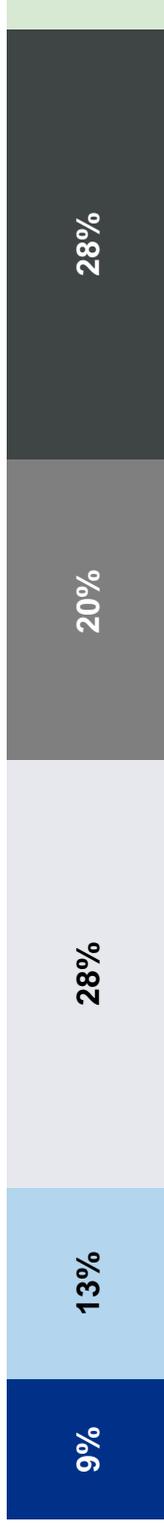
Brand Impressions

- Overall brand impressions among customers are quite strong with 1-in-2 giving a top 3 box rating
- Those who have a strong impression of their utility are much more likely to support an RNG program

Overall Impression

(base: EGD and UG customers, n=1212)

■ Ratings of 10 ■ Ratings of 9 ■ Ratings of 8 ■ Ratings of 7 ■ Ratings of 1 to 6 ■ Don't know / not sure



Union Gas & Enbridge Gas
 Distribution Combined

Top 3 Box



	Support for EGD/UG offering a program for customers to help pay for RNG projects	Support for any of the voluntary program options (\$2, \$10, \$20/month)	Support for a voluntary program of "Round-up for Renewables"	Support for mandatory program that requires all customers to pay an additional \$2/month
Total (n=1212)	60%	71%	70%	65%
Impact of Impression Rating				
Ratings of 9 or 10 (n=264)	75%	81%	80%	79%
Ratings of 7 or 8 (n=579)	63%	77%	75%	71%
Ratings of 1 to 6 (n=342)	44%	56%	57%	46%

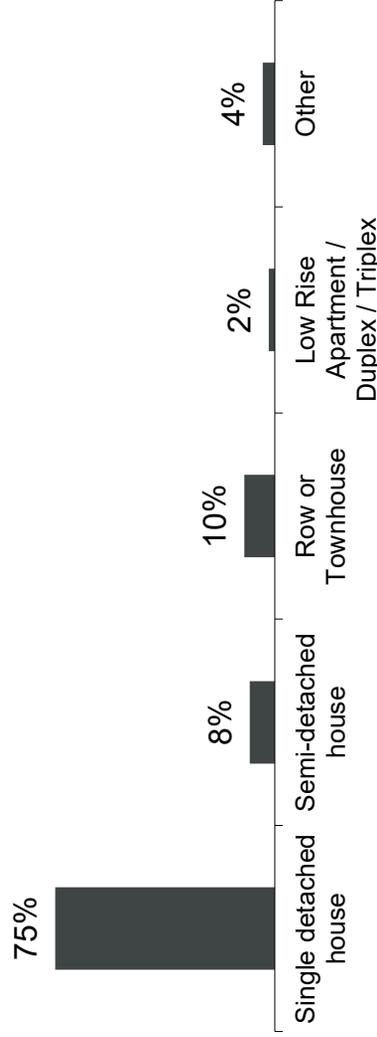
Who will pay \$20/month for 20% RNG?

Among customers, 6% (n=70) indicate they strongly support and are very likely to sign-up for a voluntary program that costs \$20/month within the next month. These customers ...

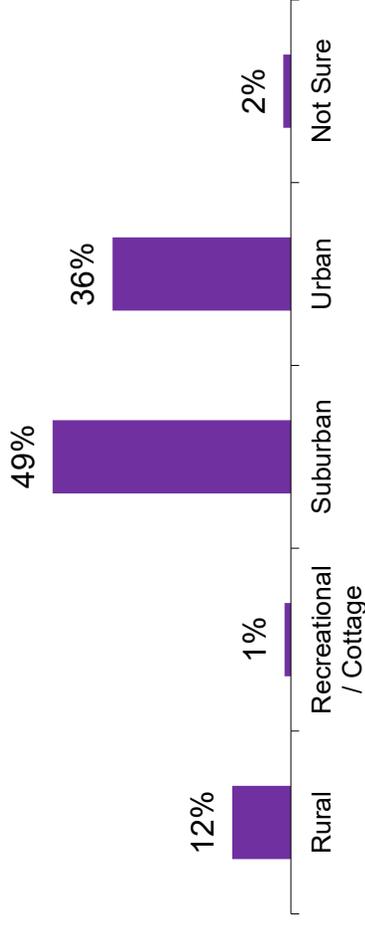
- ✓ Have strong attitudes towards the environment :
 - The environment is at a critical crossroad and we need to do everything we can do to protect it (96% agreement)
 - I am prepared to change my behaviour significantly in order to make progress in addressing climate change (95% agreement)
 - I am willing to pay more money for many day-to-day products in order to help address environmental problems facing society today (91% agreement)
 - The issue of the environment is critical (59% compared to 31% at the total level)
- ✓ Are more likely to already be aware of RNG at 55% aware (compared to 35% at the total level) and highlight the importance of the attributes of RNG
- ✓ Have slightly higher income levels compared to the average customer (~\$105K compared to ~90K at the total level)
- ✓ Are slightly younger in age compared to the average (11% in 18-34 age category compared to 8% at the total level)
- ✓ Are found in both EGD/UG territories (same proportion as the customer population) but are more likely to be urban (45% vs. 36%)
- ✓ Slightly more likely to be paperless customers (54%) compared to the total (50%)
- ✓ Not surprisingly, their absolute maximum willingness to pay per month is higher than the average at \$29.41(compared to \$17.21)

Demographics (Home)

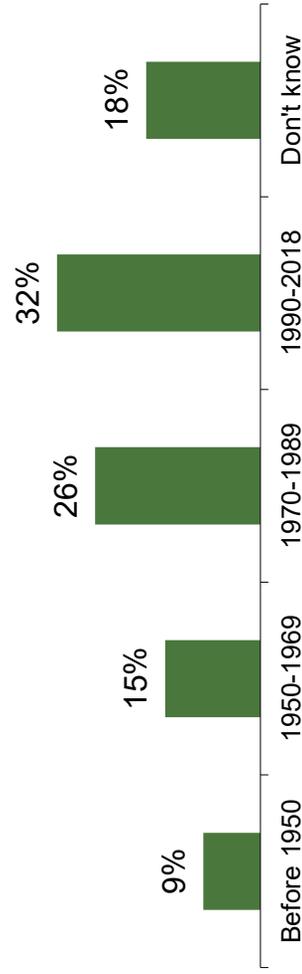
Type of residence



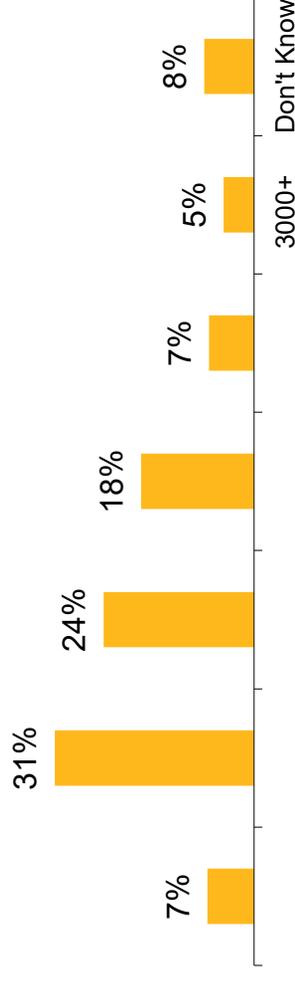
Geographic Area



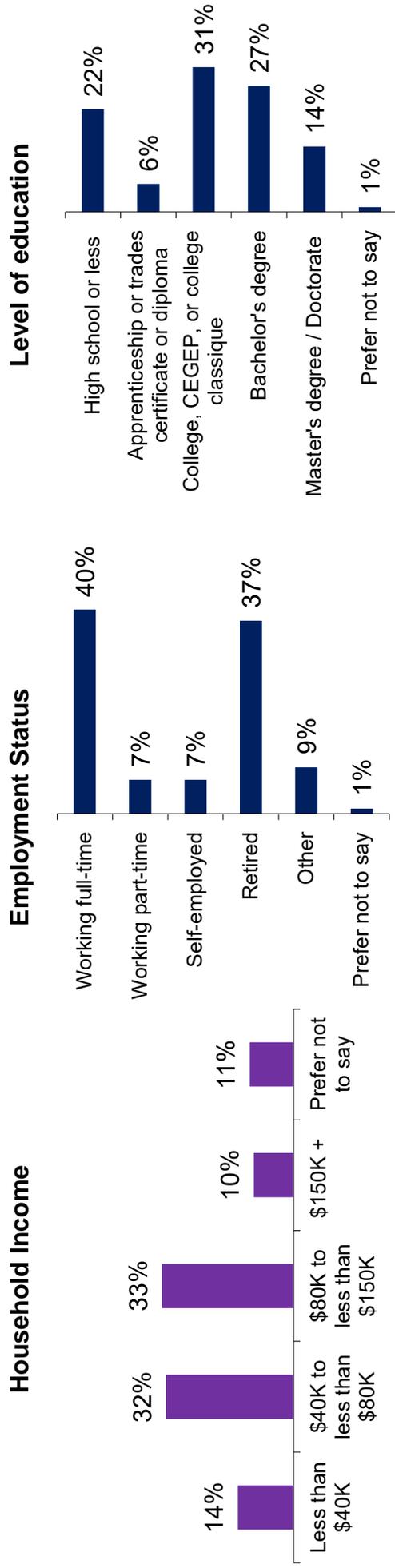
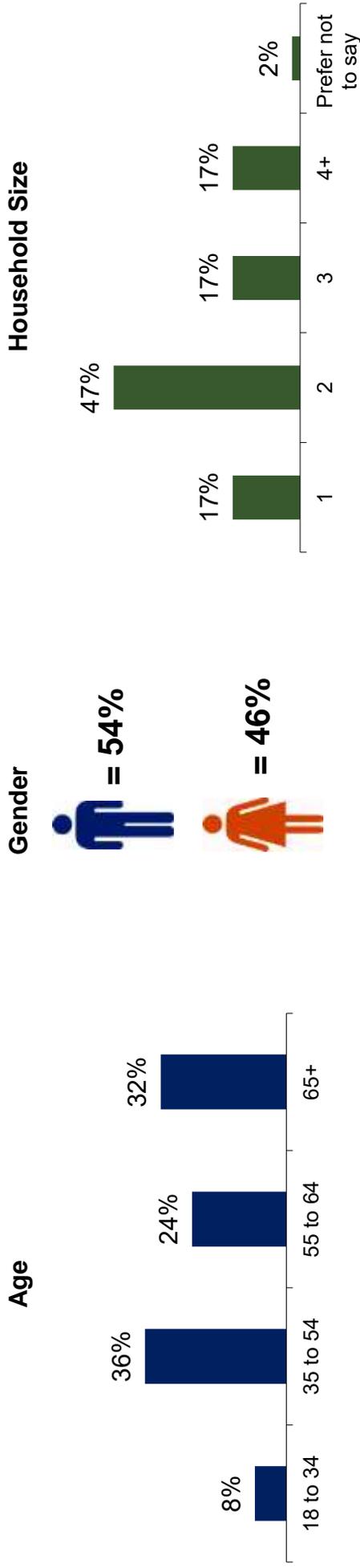
Age of Home



Size of Home (Sq Ft)

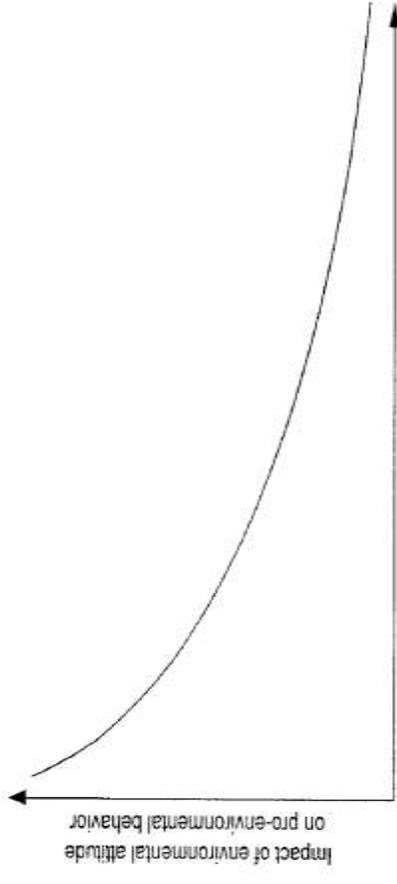


Demographics (Consumer)



Putting the research into a broader context helps to understand results and how we can use findings to predict future behaviour

- A large body of academic literature on exists on the value-action or the attitude-action gap
- The question of what shapes pro-environmental behaviour is complex and involves a number of different factors:
 - **Demographic:** gender (women have less environmental knowledge but are more emotionally engaged) and education (more education means more knowledge of environmental issues, but not necessarily increased pro-environmental behaviour)
 - **External:** institutional, economic, social and cultural
 - **Internal:** motivation, environmental knowledge (only a small fraction of pro-environment behaviour can be linked to knowledge), values, attitudes, environmental awareness, emotional involvement, locus of control, and priorities
- Research finds that pro-environmental attitudes (one of the internal factors) actually have varying and often a small impact on pro-environmental behaviour (this is the attitude-action gap)
- Some authors suggest that people choose behaviours with least cost (economic and / or psychological costs)
- “People often act in ways that both fail to align with their knowledge, values, attitudes, and intentions and fall short of maximising their material interests.”



Low-cost high-cost model of pro-environmental behavior (Diekmann & Preisendoerfer).



Survey Instrument



**Microsoft Word
Document**