



# Utah Residential Energy Efficiency Survey

*Conducted by*

**Dan Jones**  
**& ASSOCIATES**

Public Opinion & Market Research

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# Methodology

- ▶ *Who?* Utah residential customers
  - ▶ Screened to be
    - ▶ Customers of Rocky Mountain Power and Questar Gas
    - ▶ Head-of-household
    - ▶ Likely to contact utility companies about services
- ▶ *How?* Telephone interviews
  - ▶ Weekdays during evening hours and Saturdays midday
- ▶ *When?* July 22 – August 4, 2011, (2010: July 19 – August 16, 2010)
- ▶ *How many?* 576 RMP Customers, (2010: 557)
  - ▶ Participants subset – 2011: 431, (2010: 350)
  - ▶ Non-participants subset – 2011: 145, (2010: 207)
  - ▶ Only RMP customers are included in this analysis
- ▶ *Margin of error:*  $\pm 4.1\%$ , (2010:  $\pm 4.2\%$ )
  - ▶ Participants subset – 2011:  $\pm 4.7\%$ , (2010:  $\pm 5.3\%$ )
  - ▶ Non-participants subset – 2011:  $\pm 8.1\%$ , (2010:  $\pm 6.9\%$ )

# Methodology

*(Continued.)*

## ▶ Survey Instrument

- ▶ Structured questions to measure intensity
- ▶ Unstructured questions to assess perceptions
- ▶ Demographic questions to provide opinions of subgroups
- ▶ Pretested for clarity, completeness, and shared language
- ▶ Approved by client

## ▶ Sample

- ▶ Random sampling of households in Utah

## ▶ Fieldwork

- ▶ Professional, experienced interviewers
- ▶ Interviewers were briefed by project director before fieldwork began
- ▶ Conducted from Dan Jones & Associates Data Collection Center, where interviewers are supervised and monitored

# Methodology

*(Continued.)*

## ▶ Data Analysis

- ▶ Statistical results have been prepared by Dan Jones & Associates
- ▶ Each question has a response distribution
- ▶ Cross-tabulations organize responses by demographic groupings and allow for the detection of differences that may exist among opinions of subgroups
- ▶ SPSS was used to test for demographic correlations and relationships
- ▶ Checkmarks (✓) highlight statistically significant findings

## ▶ Limitations

- ▶ Time: only those available during field dates were able to participate
- ▶ Budget: too costly to reach everyone or ask for opinions on all options
- ▶ Access: not all potential respondents have access to landline telephones

# Research Objectives

- ▶ Conduct joint customer study with Questar Gas regarding energy efficiency
- ▶ Determine importance of utility companies offering energy-conservation programs
- ▶ Determine importance of customers conserving energy
- ▶ Investigate actions customers have taken to conserve energy and reasons for taking them
- ▶ Estimate likelihood of implementing energy conservation measures in the next year
- ▶ Measure awareness of programs offered by Rocky Mountain Power and Questar Gas
- ▶ Test the customers' knowledge of specific programs and who offers them
- ▶ Estimate customer participation in each of the energy-conservation programs
- ▶ Explore where people first heard about the programs
- ▶ Investigate awareness of, and likelihood of, participating in the in-home Home Energy Audit
- ▶ Measure interest in an online home energy assessment tool
- ▶ Determine customer perceptions of utility companies' interest in energy conservation
- ▶ Identify where customers would look for information about energy saving and efficiency
- ▶ Determine best methods for utility companies to communicate with customers
- ▶ Apply statistical testing to determine affinities among demographic groups
- ▶ Where applicable, compare 2011 findings to 2010 results where applicable.



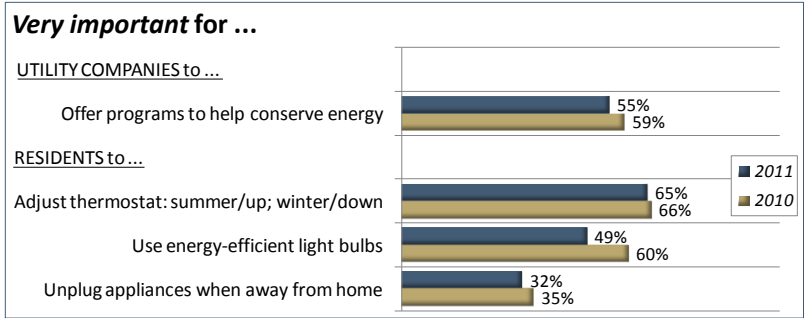
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# Key Findings and Recommendations

# Key Findings

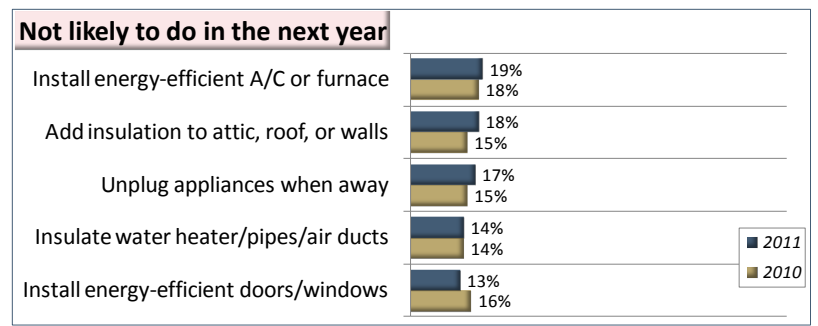
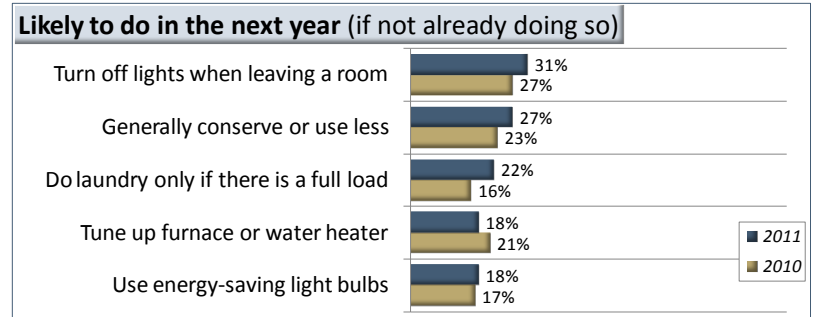
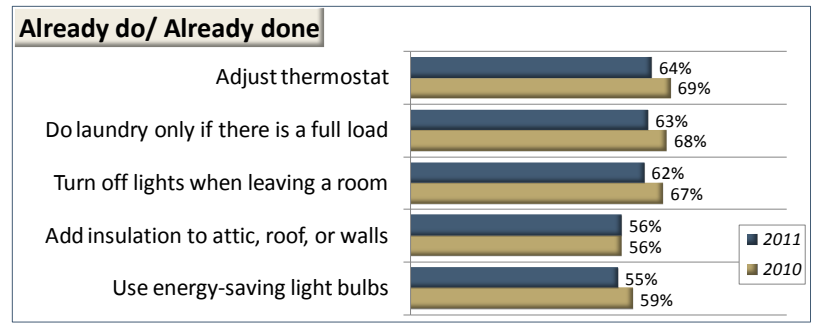
## Resident's are less energy conscious this year

- At least 32% say it is *very important* to do simple energy-saving measures, but 55% feel it is *very important* for utility companies to offer conservation programs.



- Notably, *using energy-efficient light bulbs* is down 11 points in one year (2010: 60%; 2011: 49%)
- Saving money* is the top motivator (2010: 75% and 2011: 75%) for conserving energy.
- Nearly two thirds of residents (65%) have *taken actions or changed something in their household to save energy* in the past year, down 8 points from 2010 (73%).

- Top five energy-saving measures

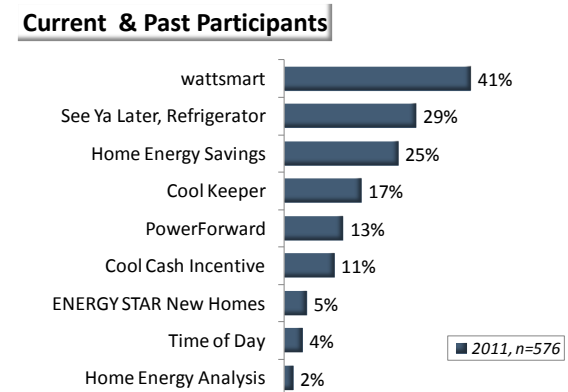




## Customers are less aware of energy-saving programs

- The percent of residents who say they are *aware of programs offered by utility companies to help customers save energy and lower utility bills* is down from last year (2010: 71%; 2011: 61%).
- Among those who say they are aware that such programs are offered, ...
  - Top unaided responses of what they ask residents to do are:
    - *Cool Keeper* (2010: 11%; 2011: 27%)
    - *Insulate* (2010: 11%; 2011: 11%)
    - *Conserve energy* (2010: 7%; 2011: 11%)
  - Programs with the highest level of unaided awareness are:
    - *Cool Keeper* (2010: 35%; 2011: 26%)
    - *ThermWise Appliance Rebates* (2010: 16%; 2011: 14%)
    - *ThermWise Weatherization Rebates* (2010: 21%; 2011: 11%)
    - *See Ya Later Refrigerator* (2010: 8%; 2011: 11%)

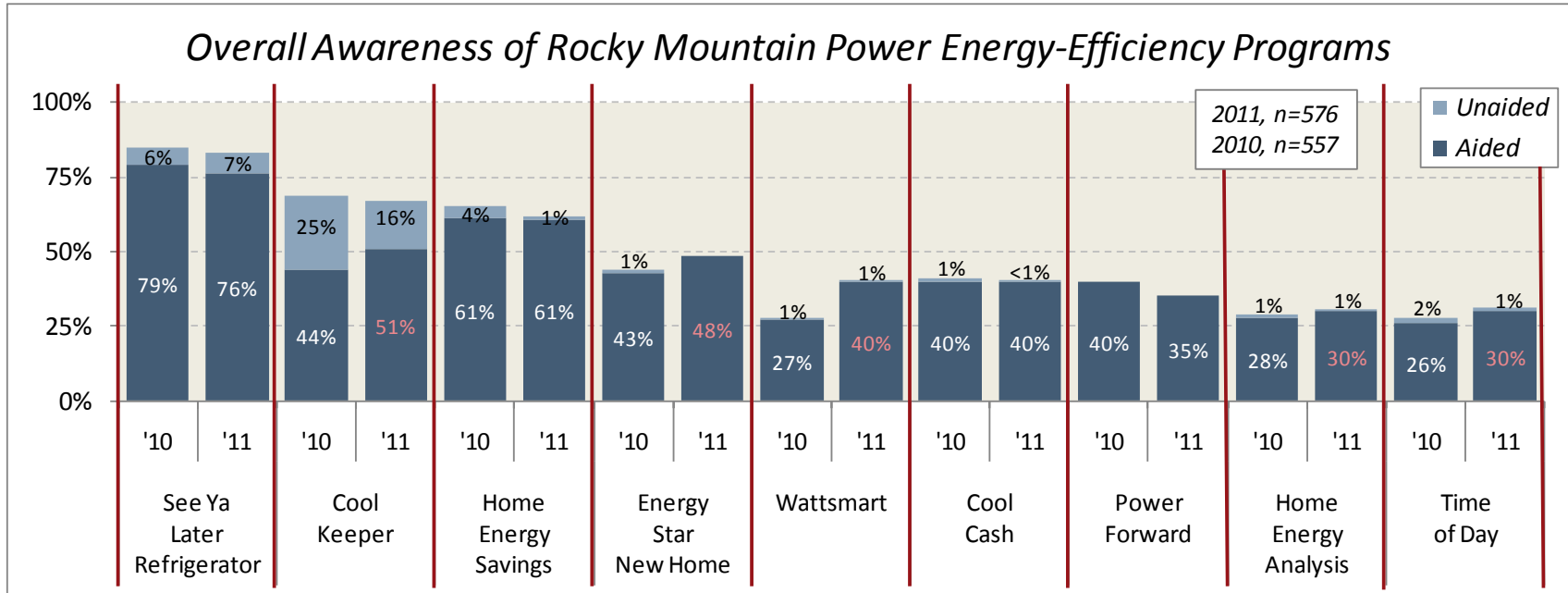
- Among customers aware of the *Cool Keeper* and *See Ya Later Refrigerator* programs, the vast majority correctly identify Rocky Mountain Power as the sponsor (90% and 85%, respectively, is 5 and 6 points lower than in 2010 (90% and 91%, respectively)).
- Two out of five customers (41%) say they currently participate in the *wattsmart* program.



Note: Due to a programming oversight in 2010, customers who were aware of a program unaided, were not asked about participation. Therefore, an annual comparison is unavailable.

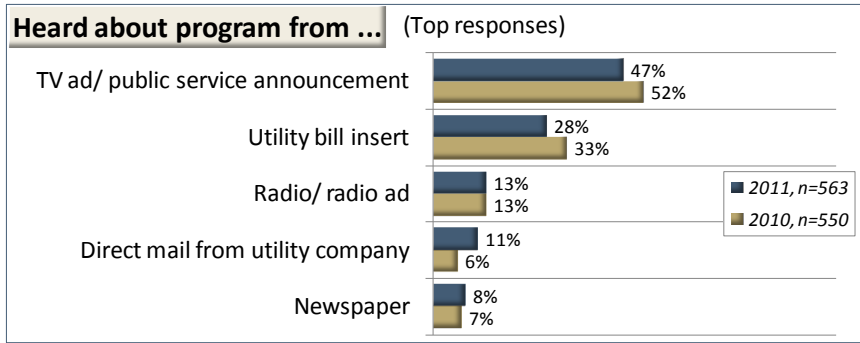
## Aided awareness increases for five programs

- Overall awareness levels of energy-savings programs (when considering aided and unaided responses) are about the same as in 2010
- Unaided awareness ranges from <1% - 16%.
- When prompted with program descriptions, overall awareness jumps to 31% - 83%.
- Four programs show increased overall awareness this year, namely:
  - *Wattsmart*, up 13 points
  - *Energy Star New Homes*, up 4 points
  - *Time of Day*, up 3 points
  - *Home Energy Analysis*, up 2 points



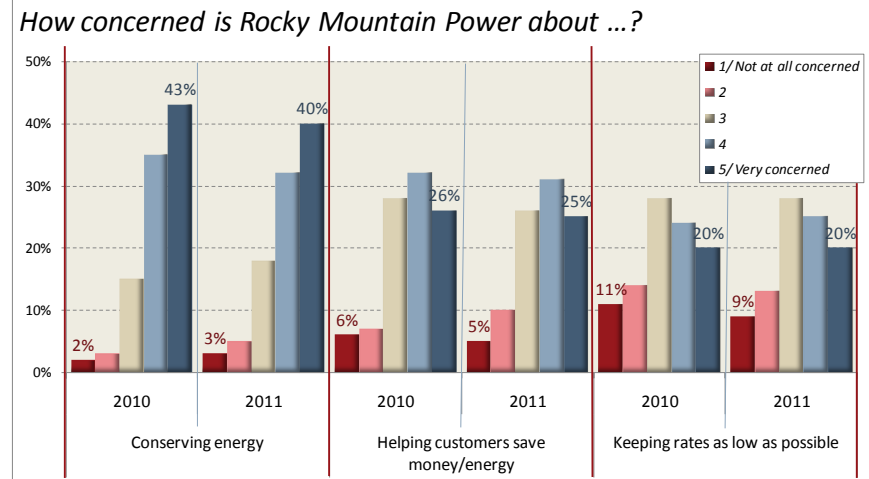
## TV and utility bills are top sources for informing public

- *TV ads* and *utility bills* remain top sources for hearing about energy-saving programs (2010: 52%; 2011: 47%)—a lower level than in 2010.
- *Direct mail from utility company* nearly doubled from 6% in 2010 to 11% in 2011 as a source for learning about programs.



- Interest in *using a free online tool* that would allow customers to perform their own home energy assessment is still moderate.
  - *Very interested*: (2010: 22%; 2011: 24%)
  - *Not at all interested*: (2010: 19%; 2011: 21%)

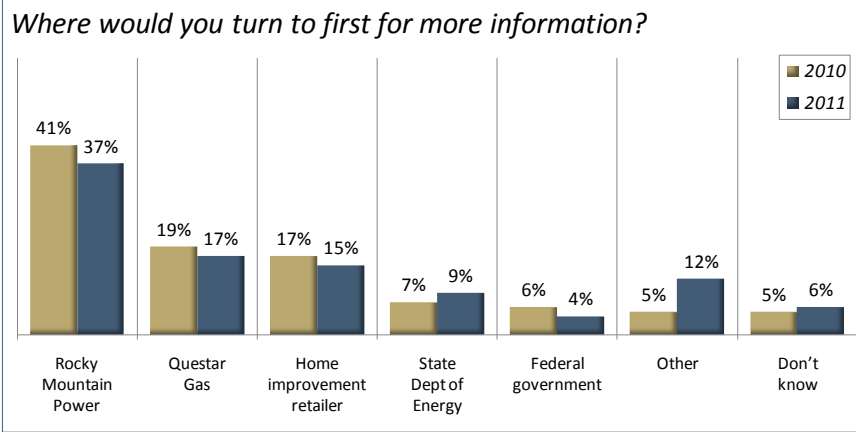
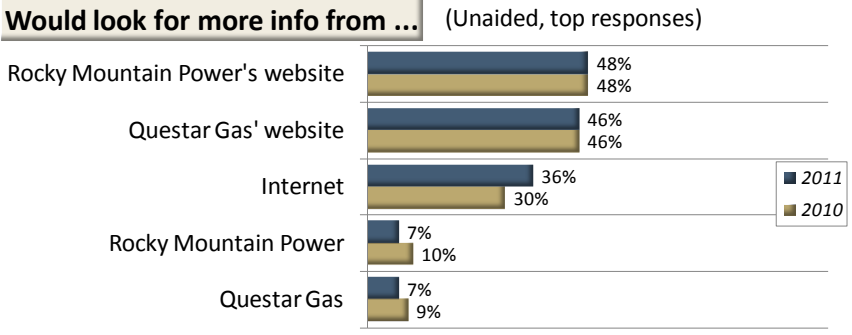
- Customers continue to feel that Rocky Mountain Power is more concerned about *conserving energy* than they are about *helping customers save money or energy*, or about *keeping rates as low as possible*.
- While perceptions of concern about *conserving energy* and *helping customers save* are lower than last year, perceptions of Rocky Mountain Power’s concern for *keeping rates as low as possible* is higher in 2011 than in 2010.



# Rocky Mountain Power's website is the top source for info

- When asked, unaided, where they would look for more information about energy efficiency or savings, customers mention company websites more often than other sources: *Rocky Mountain Power's website* (48%) and *Questar Gas' website* (46%).
- The *Internet* (search engines, especially Google) as a source gained 6 points this year (2010: 30%; 2011: 36%).

- Given a list of resources, *Rocky Mountain Power* is selected as first choice more energy efficiency information by a ratio of more than 2:1 over *Questar Gas*, the second-most popular source.



- Utility bill inserts* (2010: 40%; 2011: 38%) and *ads on TV, radio, or in the newspaper* (2010: 22%; 2011: 20%) are seen as the most effective way to communicate with customers about saving energy and money on utilities.

# Conclusions & Recommendations

## *Need to renew a commitment to saving energy*

### Conclusions

- *Unaided* awareness of programs decreased; *aided* awareness increased or held steady.
- Fewer customers say it is *very important* to engage in simple energy-saving actions.
- Less have *taken actions in their household to save energy* in the past year.
- *Saving money* is by far the top motivator for taking energy-saving measures.
- *TV ads* are the best source for hearing about programs. *Utility bill inserts* come in second.
- Unaided, customer name Rocky Mountain Power as a *source for more information* more often than any other source.
- Rocky Mountain Power is named most often as who customers *would first turn to for energy-efficiency information*.

### Recommendations

- 1) Continue making a concerted effort to get the word out, focusing on TV ads and public service announcements.
- 2) Make sure that utility bill inserts and direct mail from Rocky Mountain Power reinforce the TV ads and PSAs in branding and messaging.
- 3) Assure that communications accentuate the money-saving aspects of participating in Rocky Mountain Power's energy-efficiency programs
- 4) Capitalize on Rocky Mountain Power's status as number one source for more information:
  - a) Make sure energy-efficiency information is easy to find on Rocky Mountain Power's home page.
  - b) Optimize website for search engines



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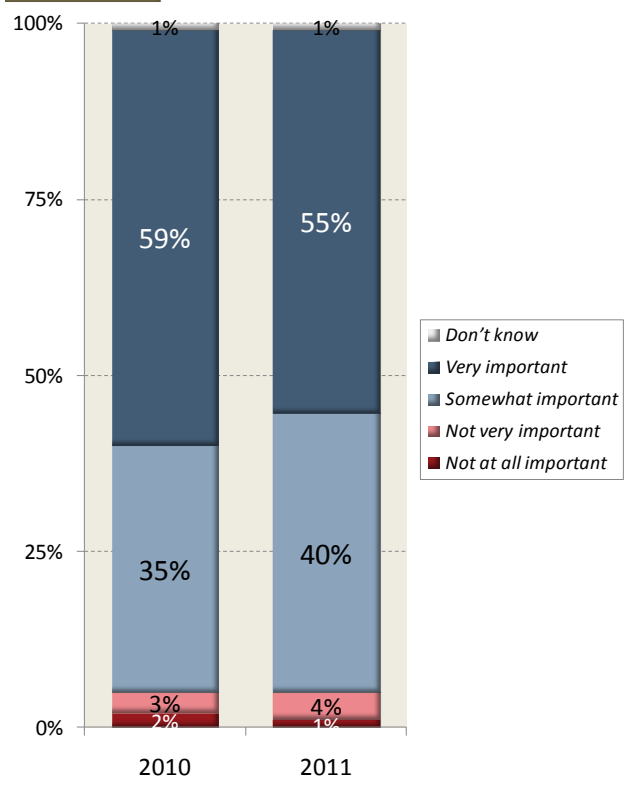
# Illustrated Results

## with statistical findings

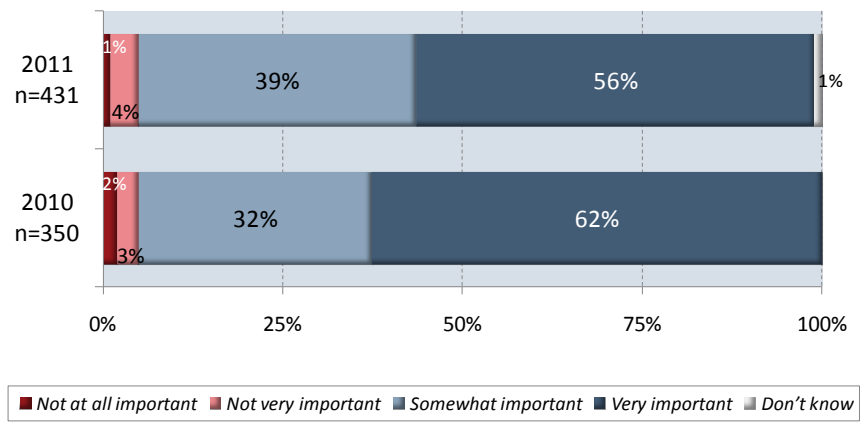
# General Attitudes

## 4. How important is it for utility companies to offer customers programs to help conserve energy?

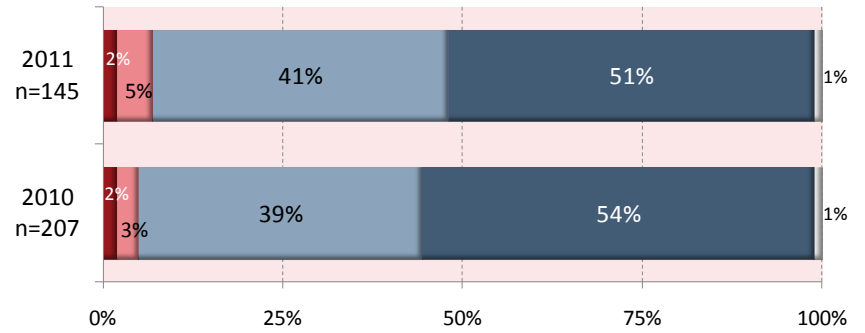
**Total Data**



**Participants**



**Non-participants**

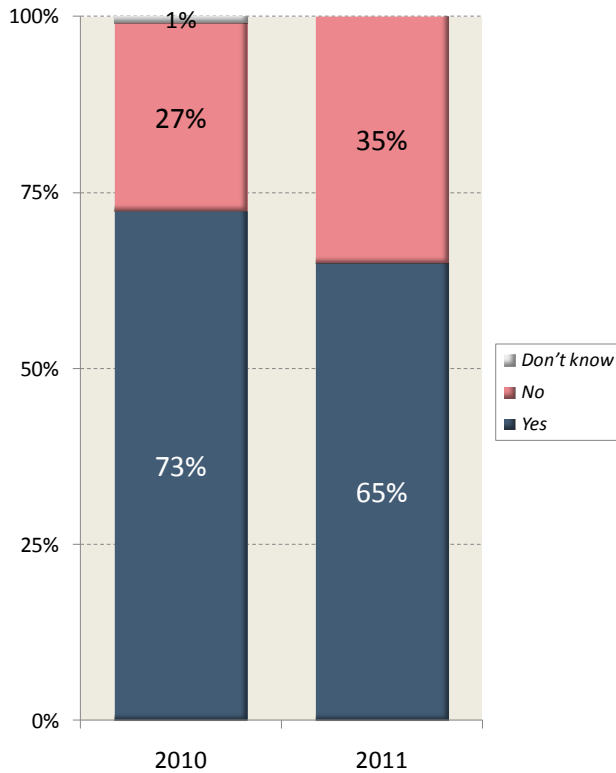


More likely to say "very important" (overall: 55%)  
 ✓ Females: 63%  
 ✓ Lower household income (likelihood increases as income decreases)

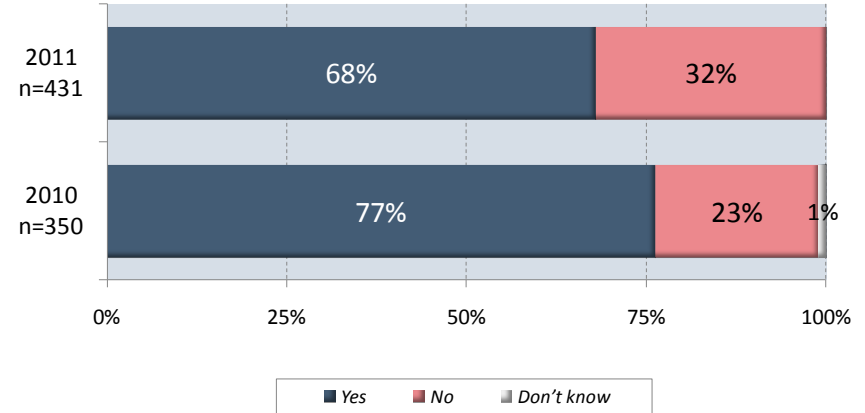


## 5. In the past year, have you taken any actions or changed anything in your household to save energy?

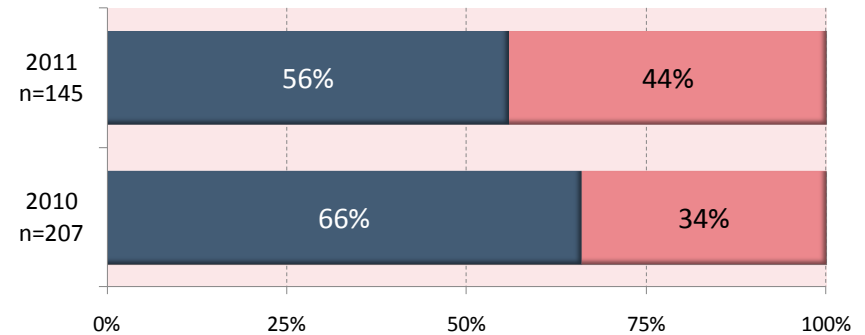
### Total Data



### Participants



### Non-participants



More likely to say "Yes" (overall: 65%)

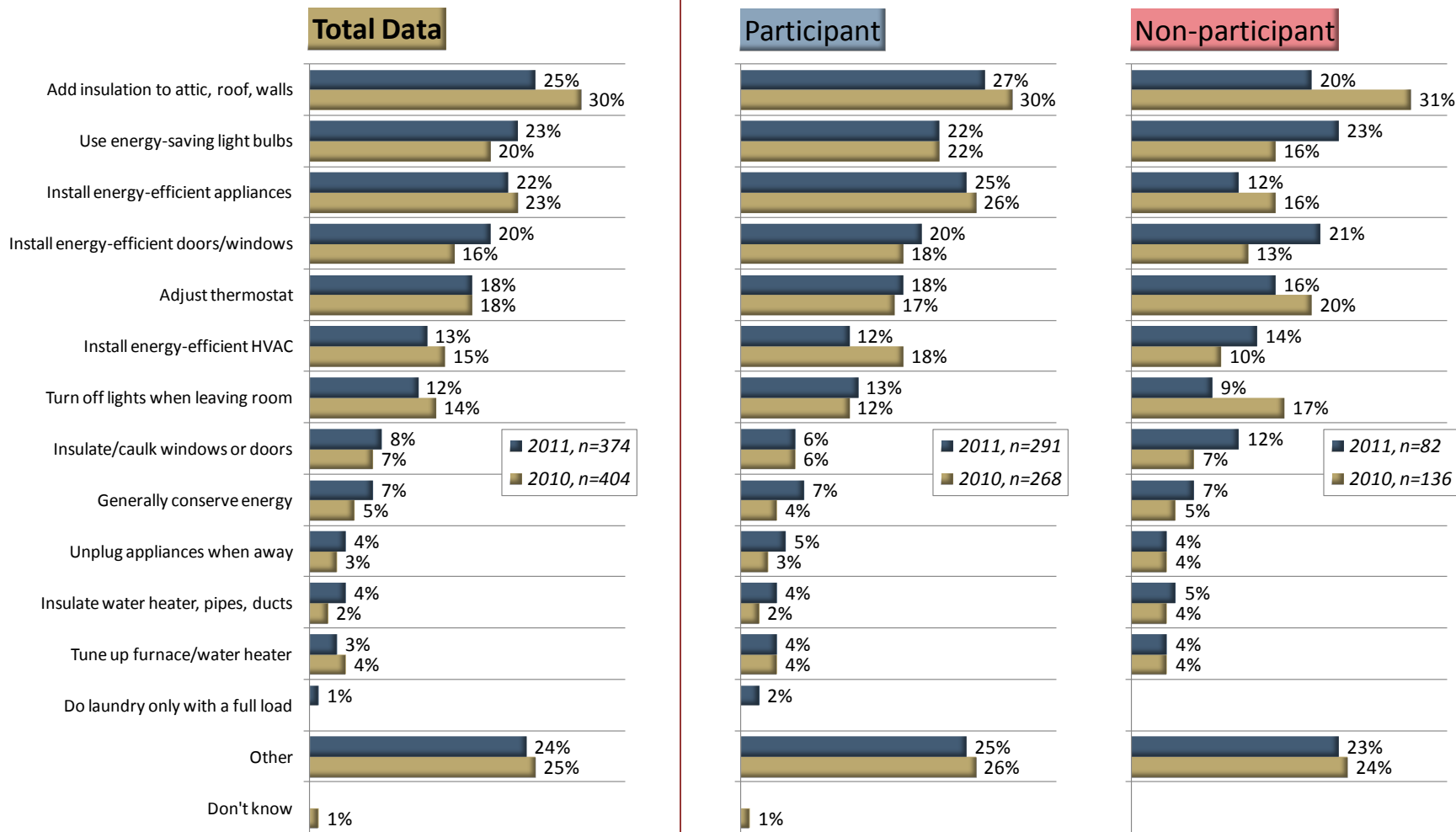
- ✓ Males: 69%
- ✓ Younger residents (likelihood increases as age decreases)
- ✓ Higher household income (likelihood increases as income increases)





## 6-20. IF YES ON Q.5:

### What actions have you taken in your home in order to save energy?





## 6-20. IF YES ON Q.5: (Continued.)

What actions have you taken in your home in order to save energy?

Less likely to say "adjust thermostat" (overall: 18%)

✓ Residents with whole-house evaporative cooling: 13%

More likely to say "install energy-efficient appliances" (overall: 22%)

✓ Females: 27%

✓ Weber County residents: 50%

✓ Davis County residents: 34%

More likely to say "use energy-saving light bulbs" (overall: 23%)

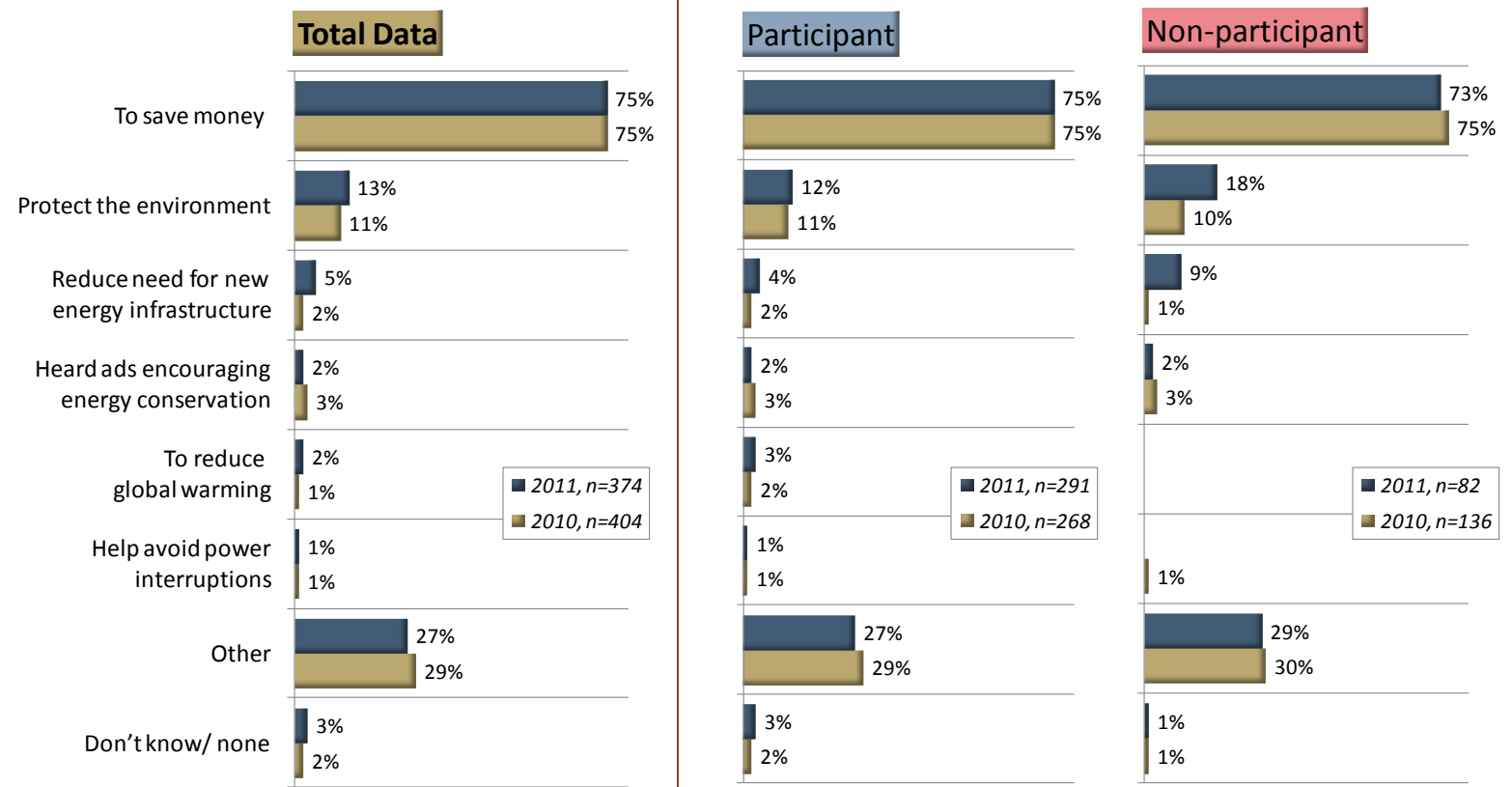
✓ Males 26%

✓ Household income less than \$40,000: 29%

✓ Household income of \$60,000-\$89,999: 28%

21-28. IF YES ON Q.5:

What are the main reasons you took steps to conserve energy in your home?



More likely to say "save money" (overall: 75%)  
 ✓ Davis County residents: 83%  
 ✓ Salt Lake County residents: 78%

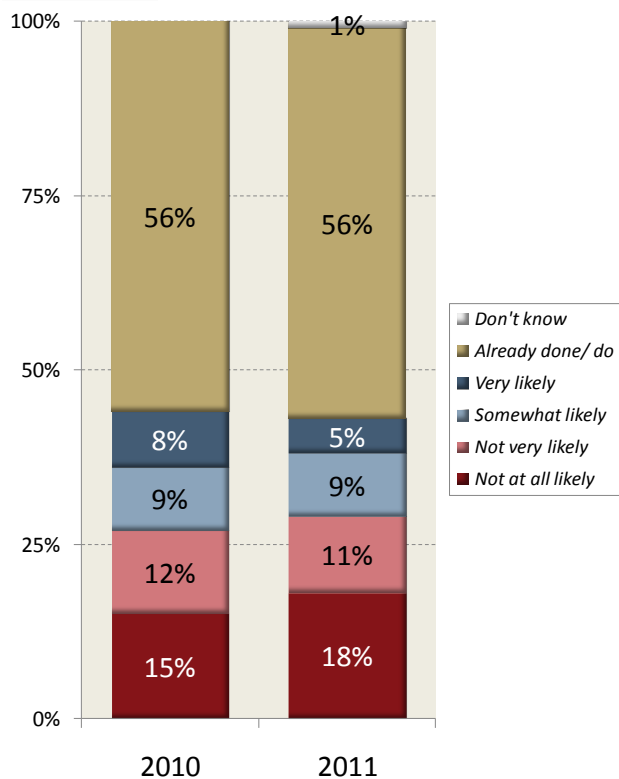
# Likelihood to Use Energy-saving Measures

(List was rotated.)

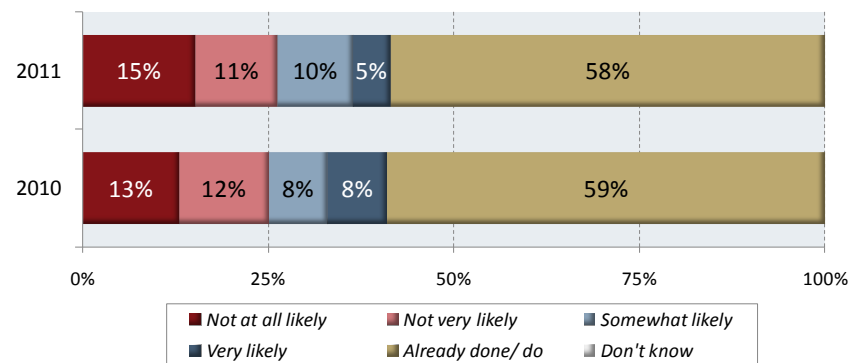
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Add insulation to your attic, roof, or walls

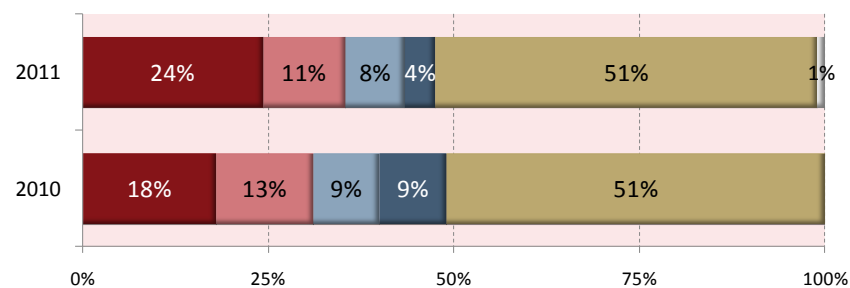
### Total Data



### Participants



### Non-participants



More likely to say "already done" (overall: 56%)

✓ Resident with central air conditioning: 62%

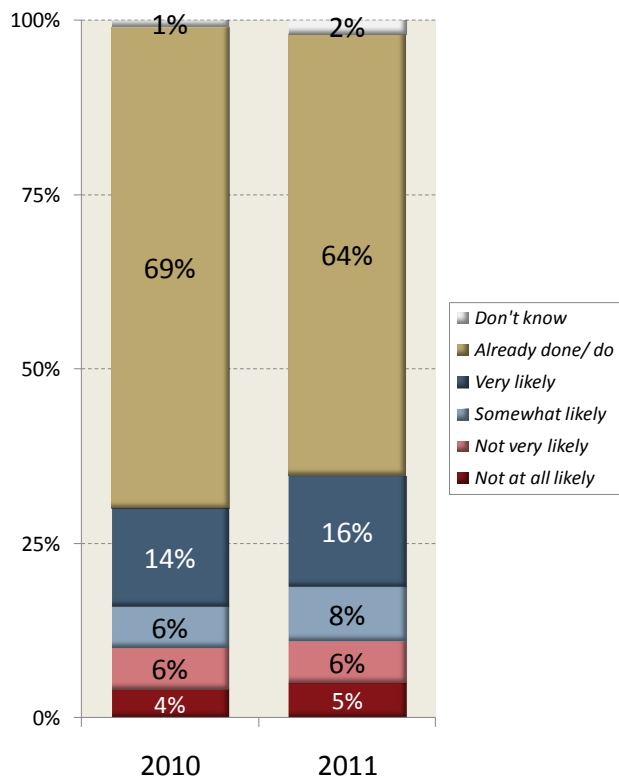
✓ Older residents (likelihood increases as age increases)



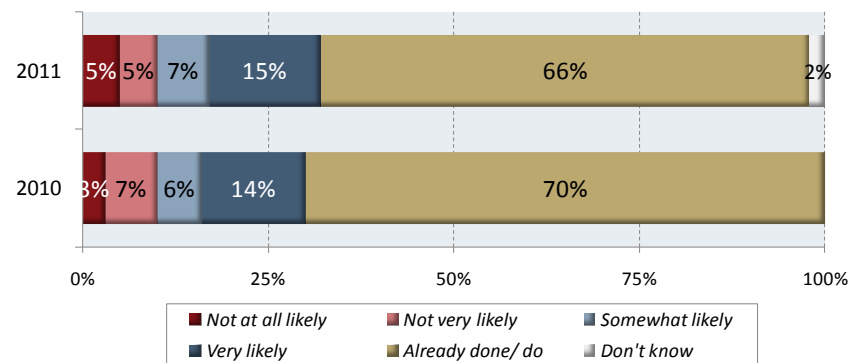
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## Adjust thermostat

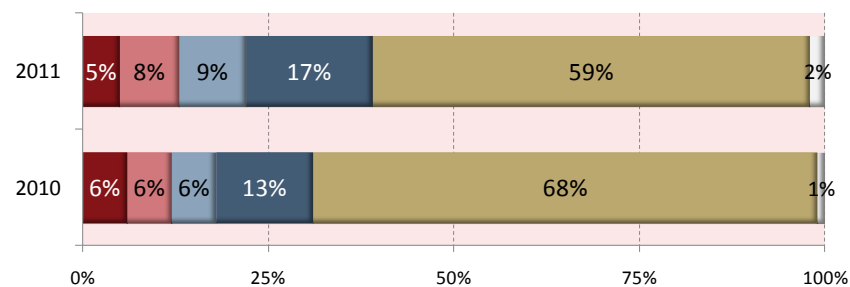
### Total Data



### Participants



### Non-participants

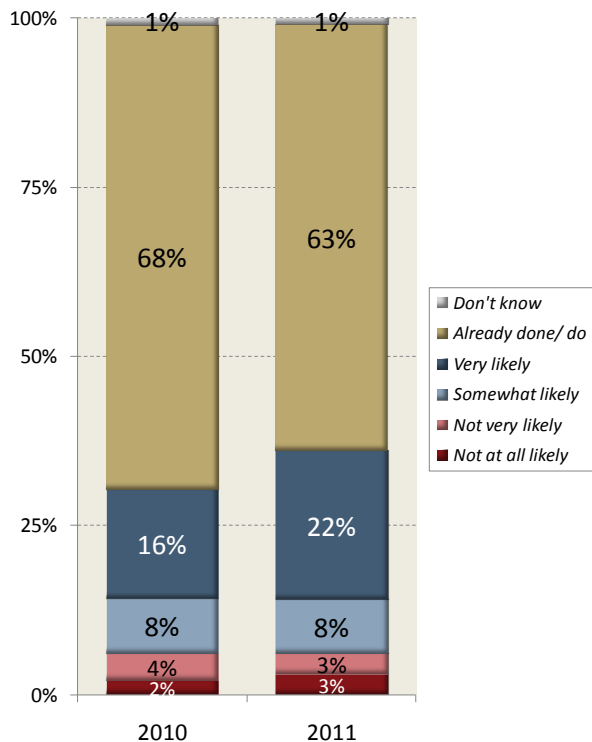


**Less likely to say "already do"** (overall: 69%)  
 ✓ Residents with a whole-house evaporative cooler: 58%

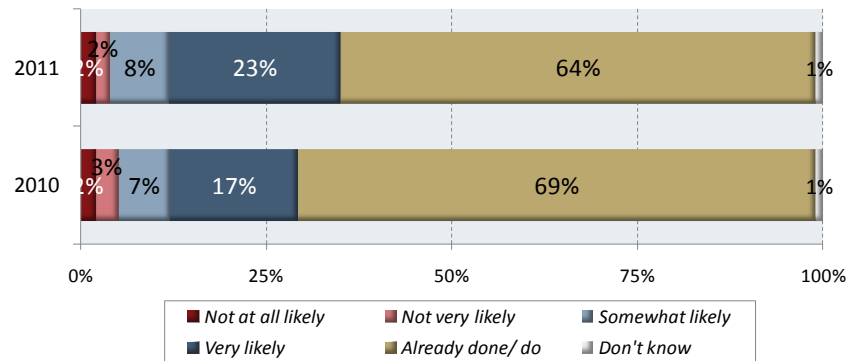
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## Do laundry only if there is a full load

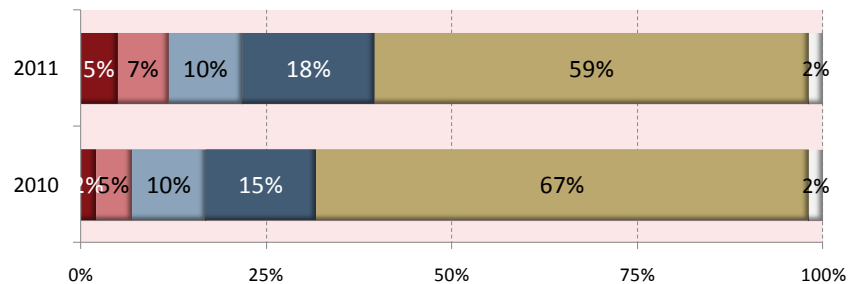
Total Data



Participants



Non-participants



More likely to say "already do" (overall: 63%)  
 ✓ Residents with central air conditioning: 67%

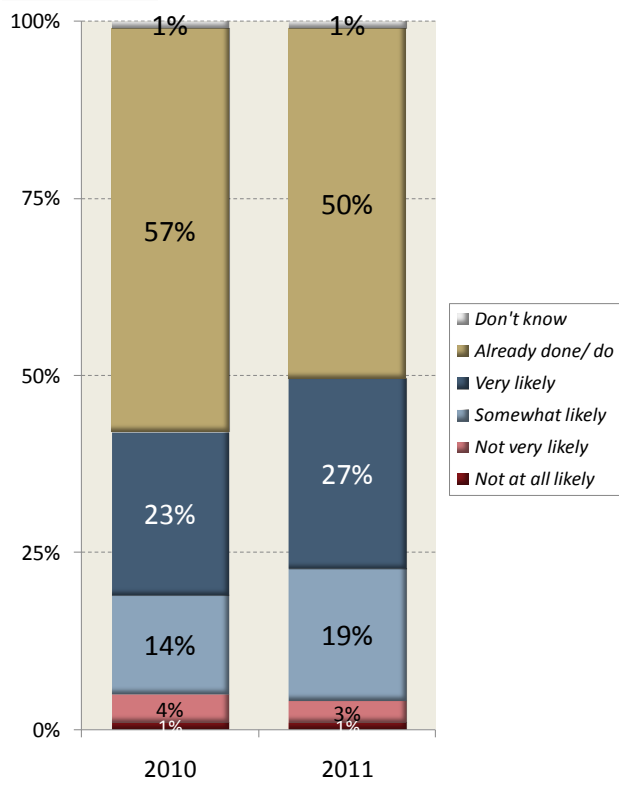
More likely to say "very likely" (overall: 22%)  
 ✓ Residents with a whole-house evaporative cooler: 26%



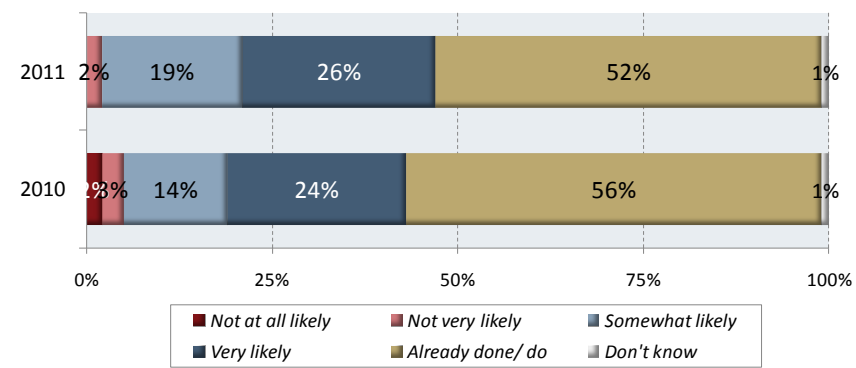
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Generally conserve or use less

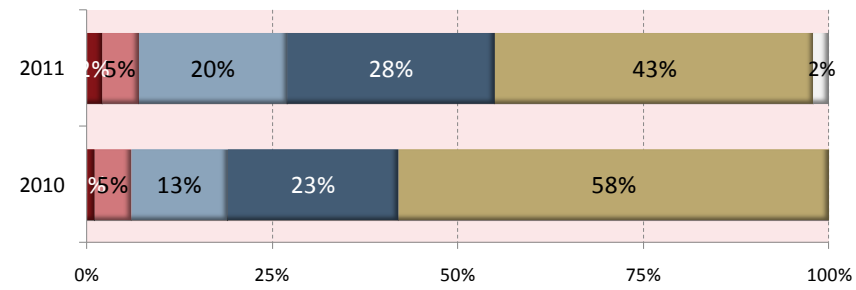
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### Participants



### Non-participants

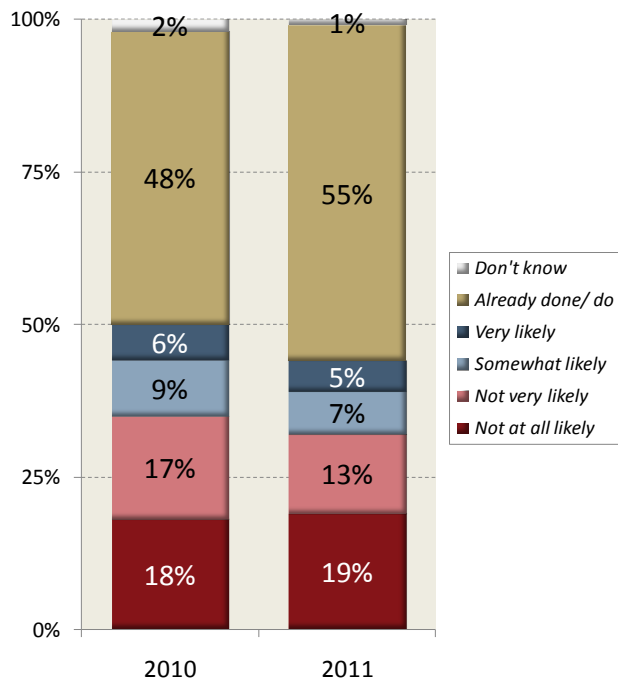


More likely to say "very likely" (overall: 27%)  
 ✓ Females: 32%  
 ✓ Older residents (likelihood increases as age increases)

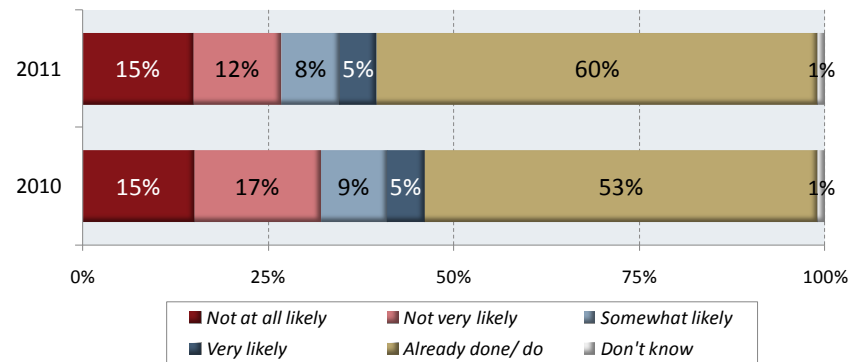
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Install an energy-efficient air conditioner or furnace

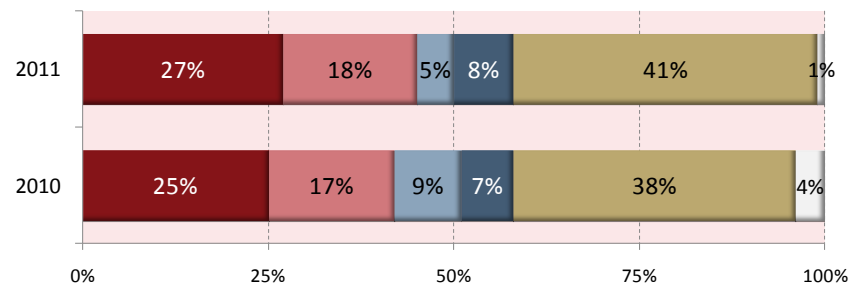
Total Data



Participants



Non-participants



More likely to say "already done" (overall: 55%)

- ✓ Residents with central air conditioning: 67%
- ✓ Older residents (likelihood increases as age increases)
- ✓ Higher household income (likelihood increases as income increases)

More likely to say "not at all likely" (overall: 19%)

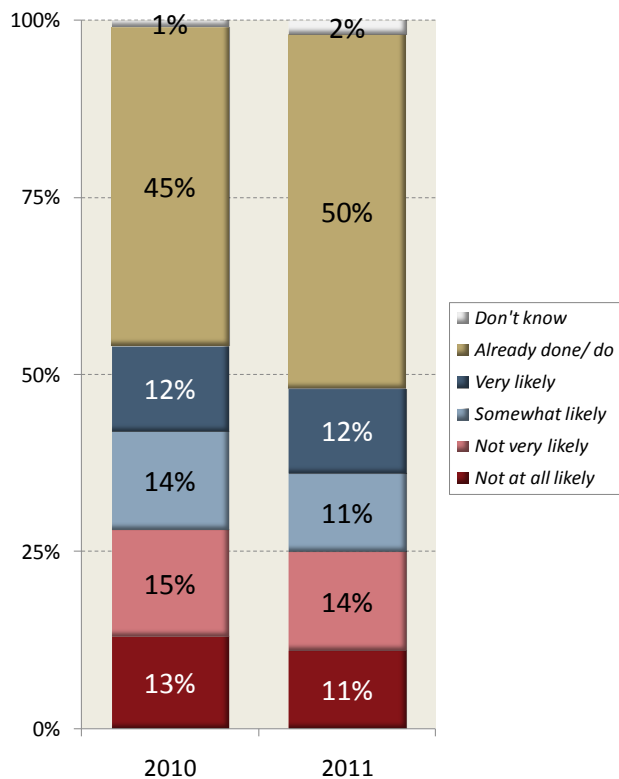
- ✓ Annual household income less than \$40,000: 34%



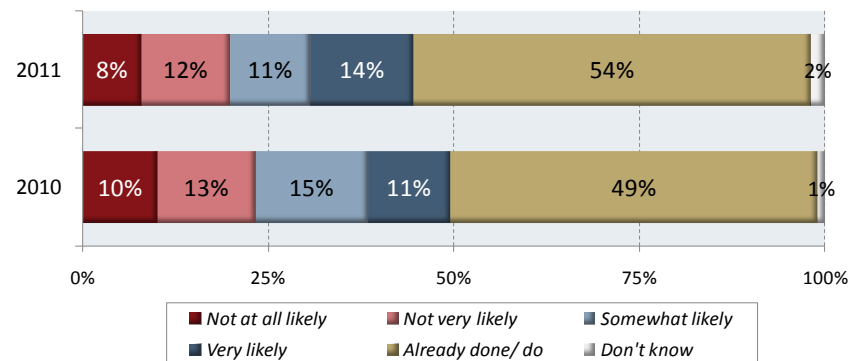
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Install energy-efficient appliances

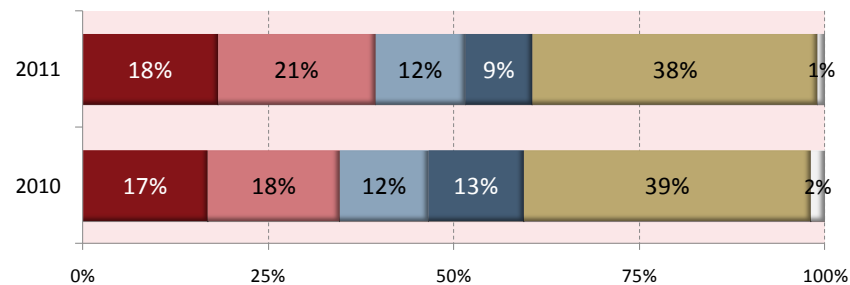
### Total Data



### Participants



### Non-participants



More likely to say "already done" (overall: 50%)

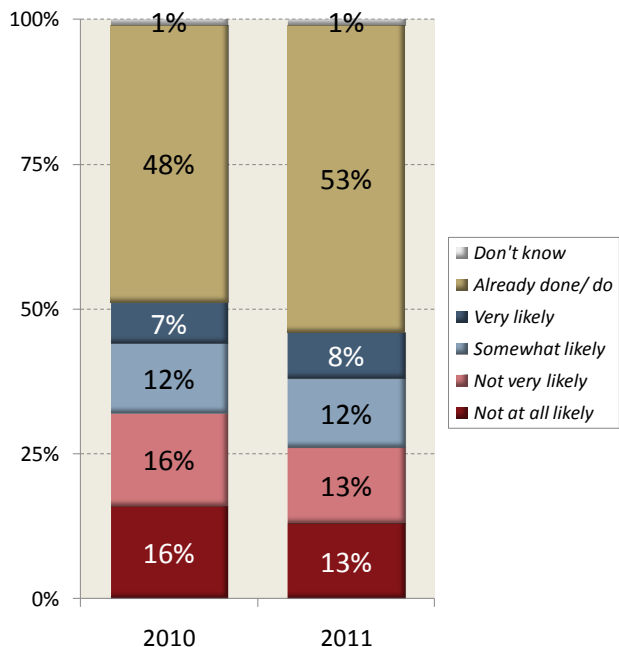
✓ Age 55-64: 60%

✓ Higher household income (likelihood increases as income increases)

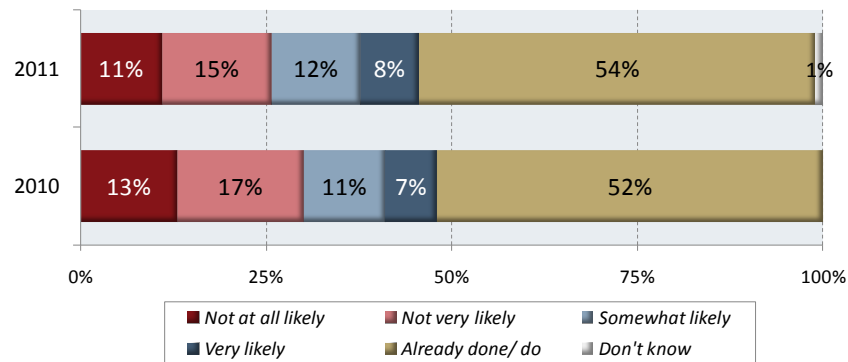
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Install energy-efficient doors or windows

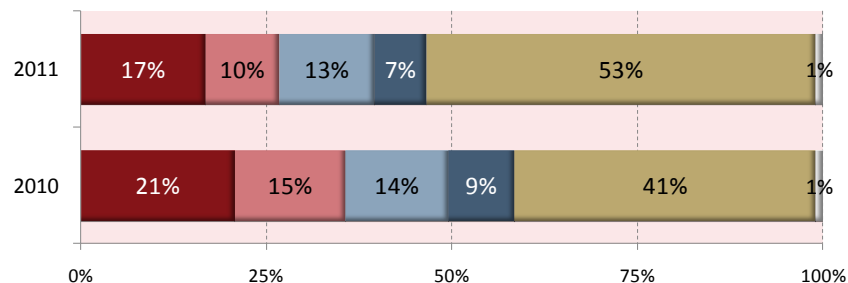
Total Data



Participants



Non-participants



More likely to say "already done" (overall: 53%)

- ✓ Older residents (likelihood increases as age increases)
- ✓ Higher household income (likelihood increases as income increases)
- ✓ Davis County and Weber County residents: 63%
- ✓ Weber County residents: 60%

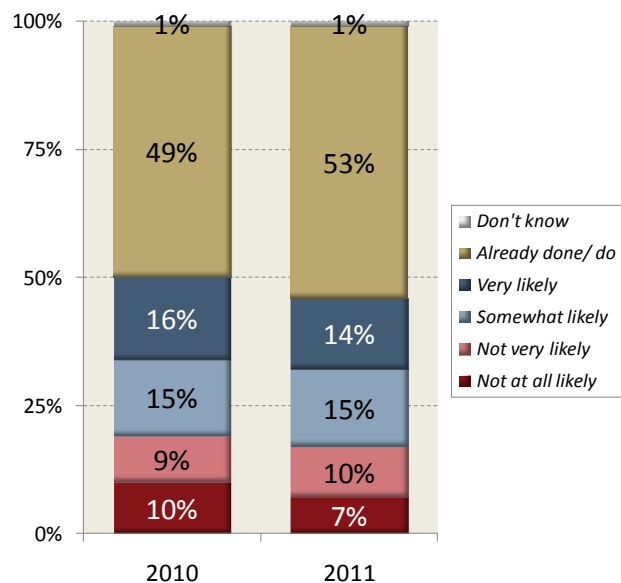
More likely to say "not at all likely" (overall: 13%)

- Annual household income less than \$40,000: 25%
- ✓ Utah County residents: 22%

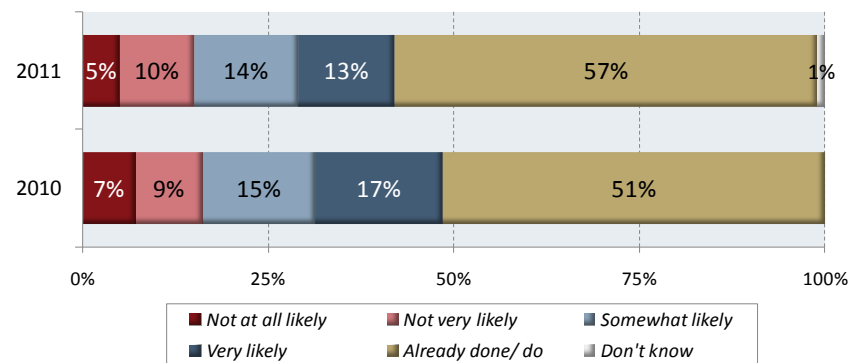
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Insulate or caulk around windows or doors

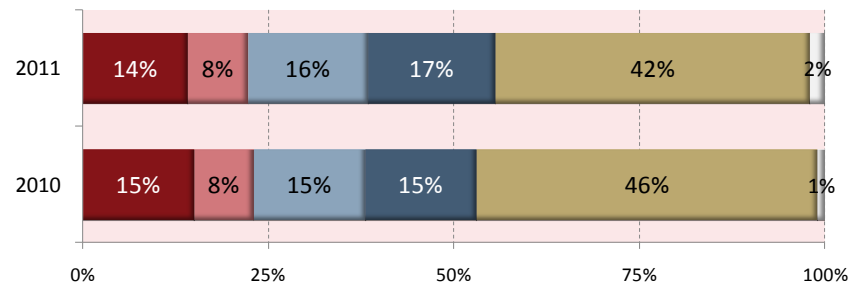
**Total Data**



**Participants**



**Non-participants**



More likely to say "already done" (overall: 53%)

- ✓ Age 45-64: 58%
- ✓ Higher household income (likelihood increases as income increases)
- ✓ Davis County residents: 72%
- ✓ Weber County residents: 66%

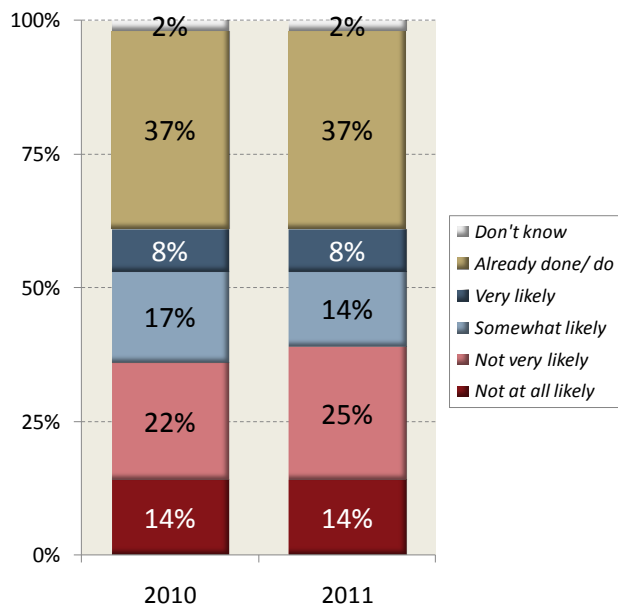
More likely to say "not at all likely" (overall: 7%)

- ✓ Under age 35 or over age 64: 15%-16%

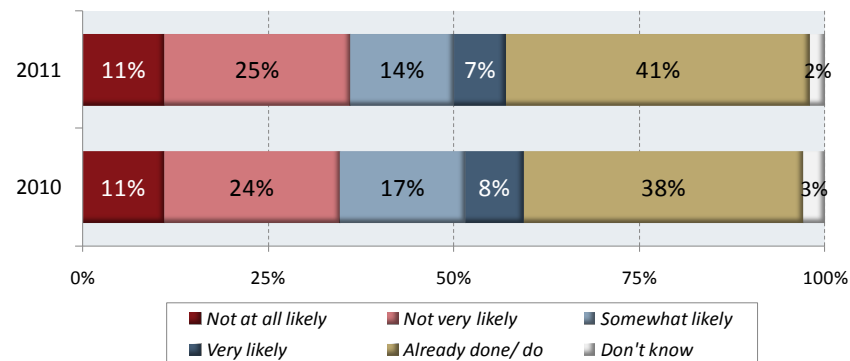
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Insulate water heater, pipes, or air ducts

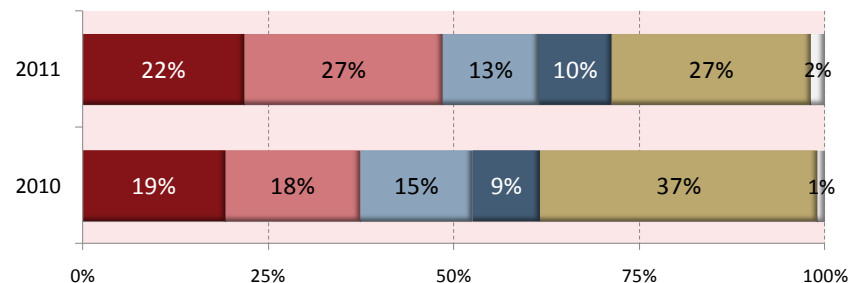
### Total Data



### Participants



### Non-participants



More likely to say "already done" (overall: 37%)

- ✓ Davis County residents: 47%
- ✓ Weber County residents: 46%

More likely to say "not at all likely" (overall: 14%)

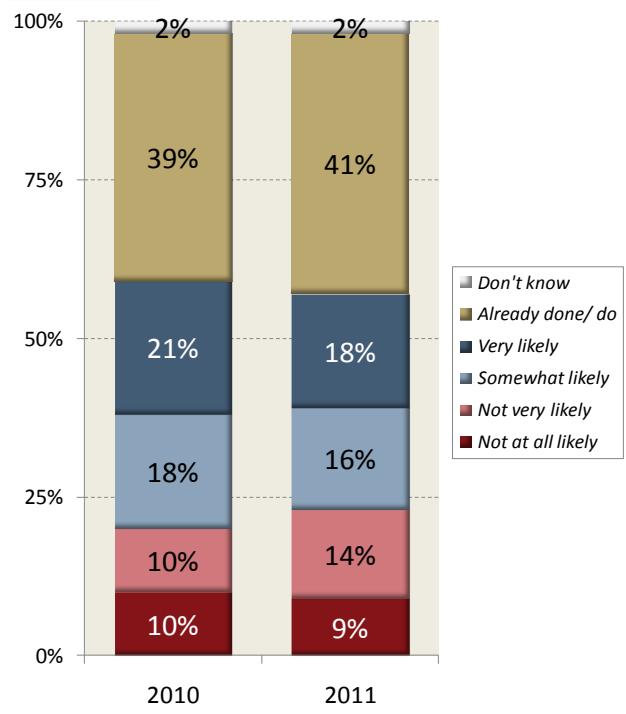
- ✓ Residents with a whole-house evaporative cooler: 22%
- ✓ Lower household income (likelihood increases as income decreases)
- ✓ Non-Wasatch Front: 22%



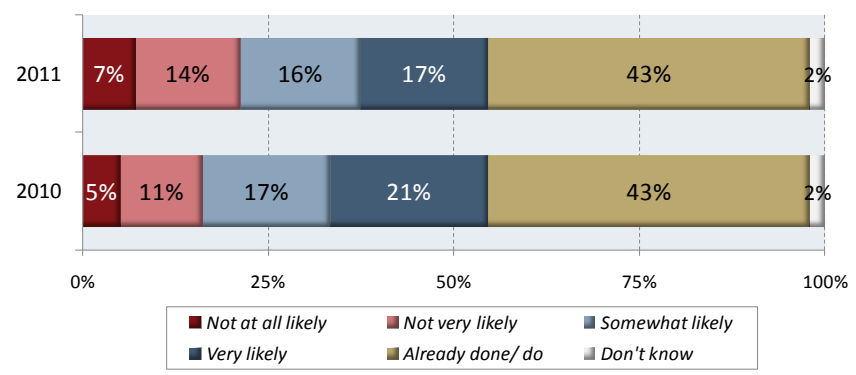
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Tune up your furnace or water heater

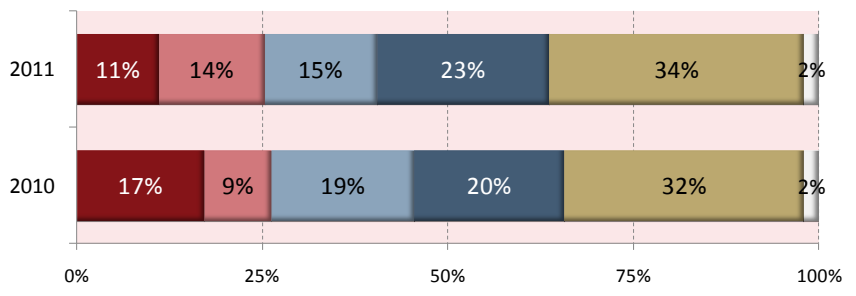
Total Data



Participants



Non-participants



More likely to say "already done" (overall: 41%)

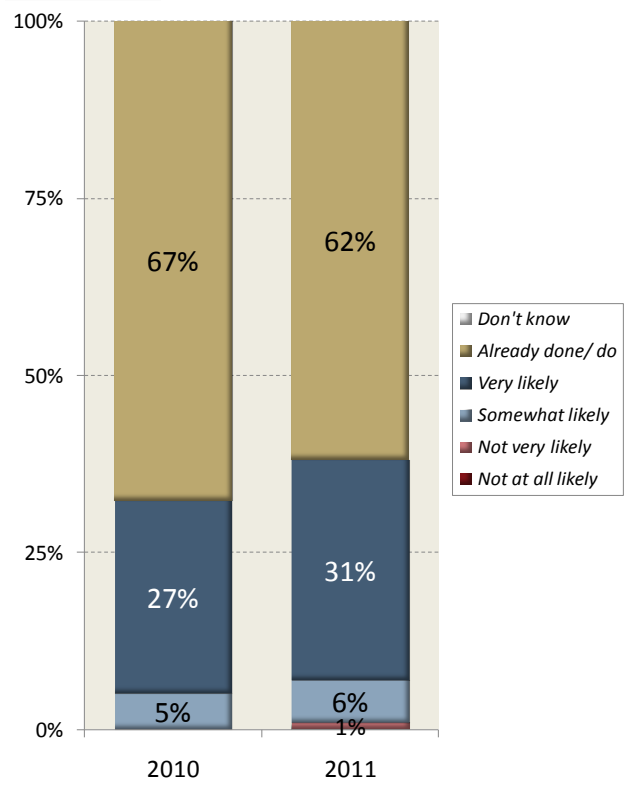
- ✓ Males: 49%
- ✓ Residents with central air conditioning: 49%
- ✓ Older residents (likelihood increases as age increases)
- ✓ Household income of \$90,000-\$129,999: 51%



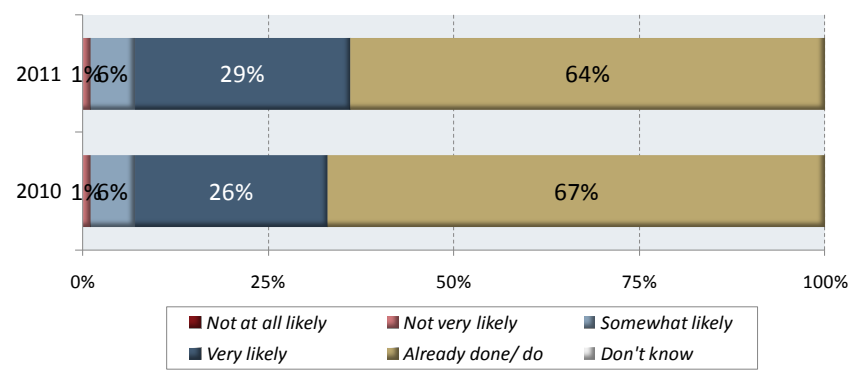
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Turn off lights when leaving a room

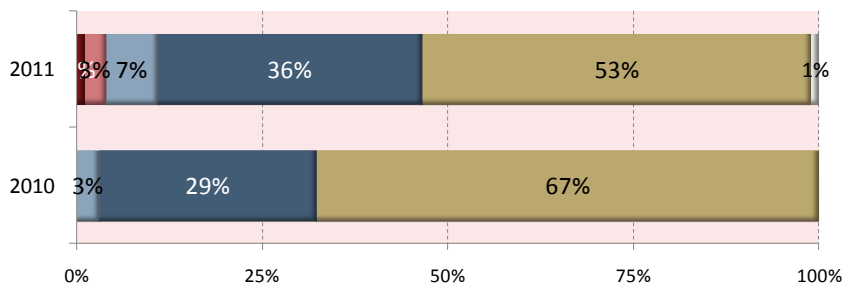
Total Data



Participants



Non-participants



More likely to say "already do" (overall: 62%)

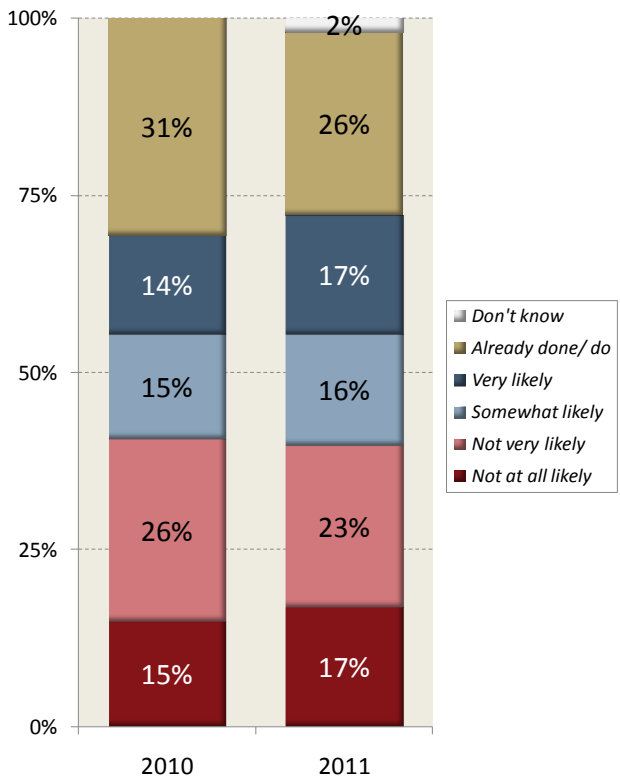
- ✓ Residents with central air conditioning: 64%
- ✓ Annual household income less than \$40,000: 72%
- ✓ Annual household income of \$60,000-\$89,999: 67%



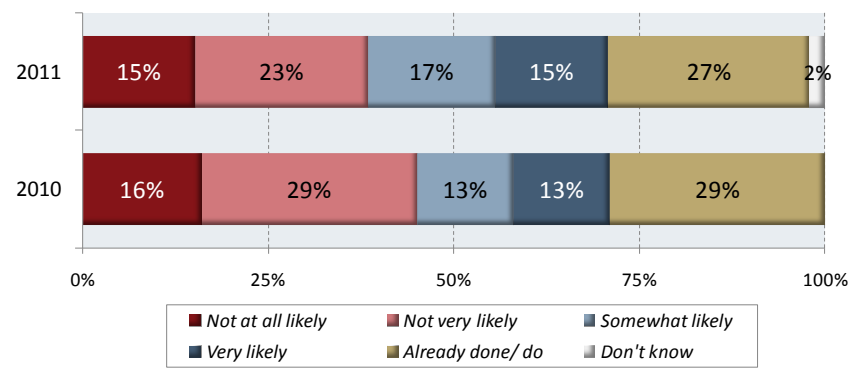
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Unplug appliances when away from home

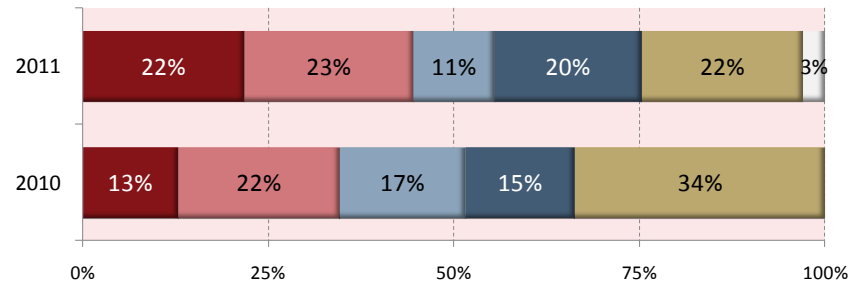
### Total Data



### Participants



### Non-participants



More likely to say "already do" (overall: 26%)  
 ✓ Lower household income (likelihood increases as income decreases)

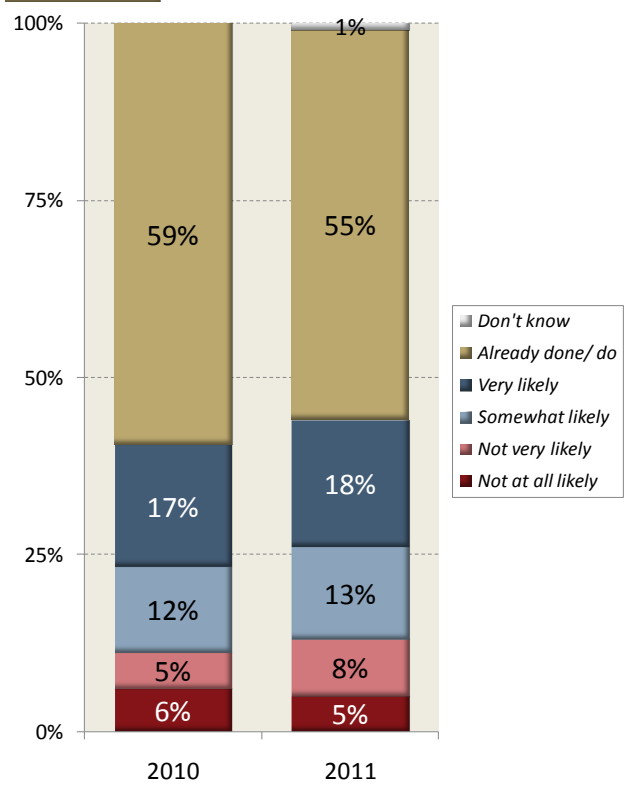
More likely to say "not at all likely" (overall: 17%)  
 ✓ Males: 24%



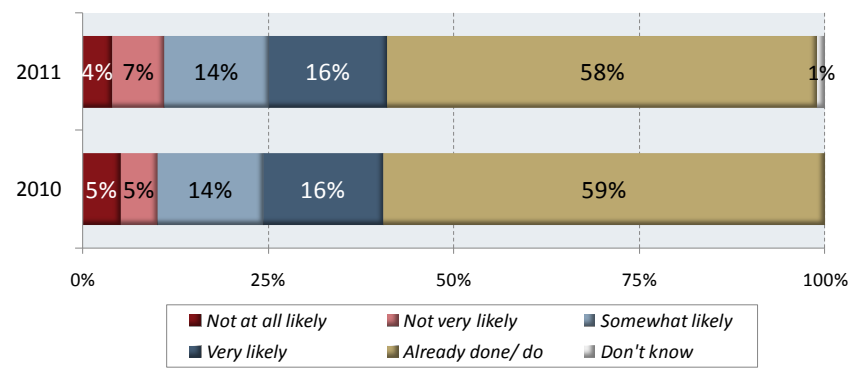
29-41. Now, I'd like you to think about some specific energy-saving measure. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you *already do or have already done*, please let me know.

## Use energy-efficient light bulbs

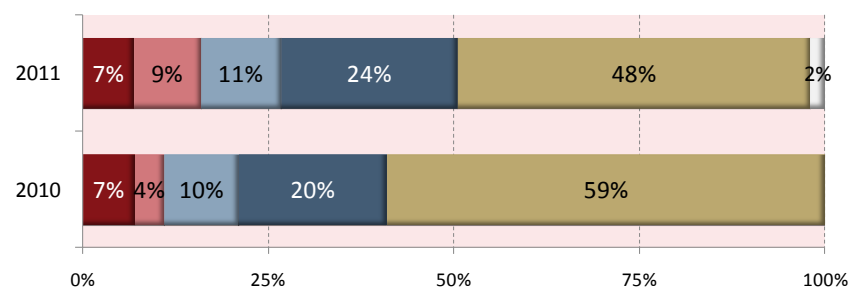
Total Data



Participants



Non-participants



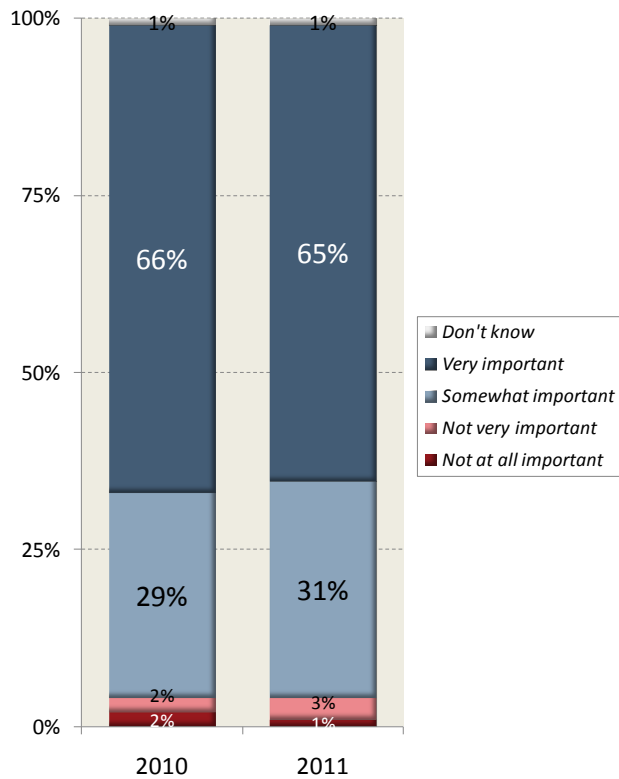


# Importance of Saving Energy

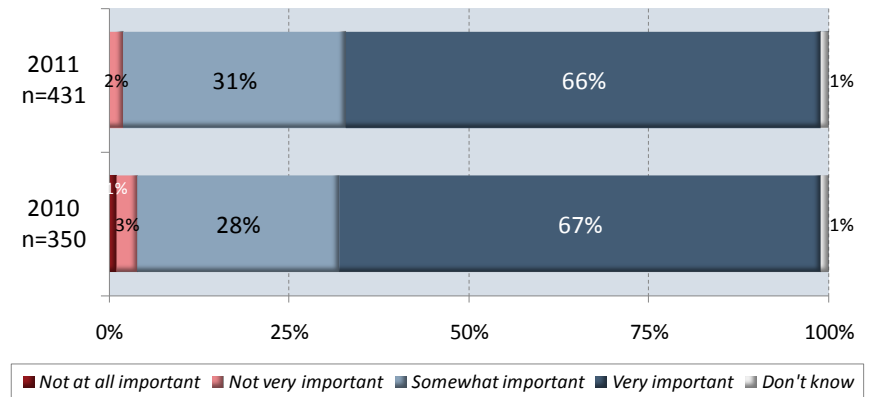
## 42. How important is it for residents to ...?

**Adjust the thermostat up in the summer and down in the winter**

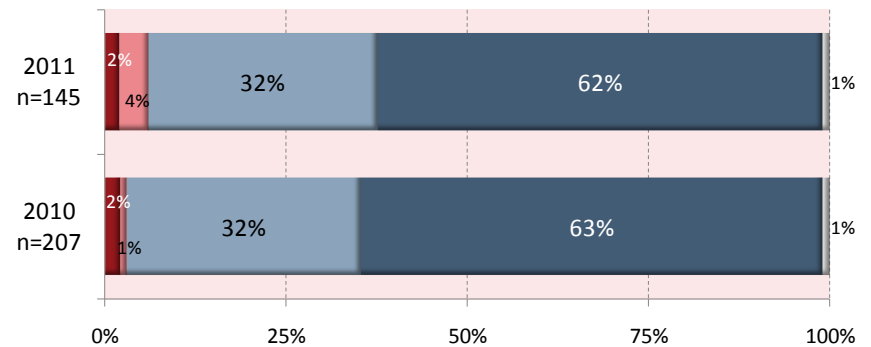
### Total Data



### Participants



### Non-participants

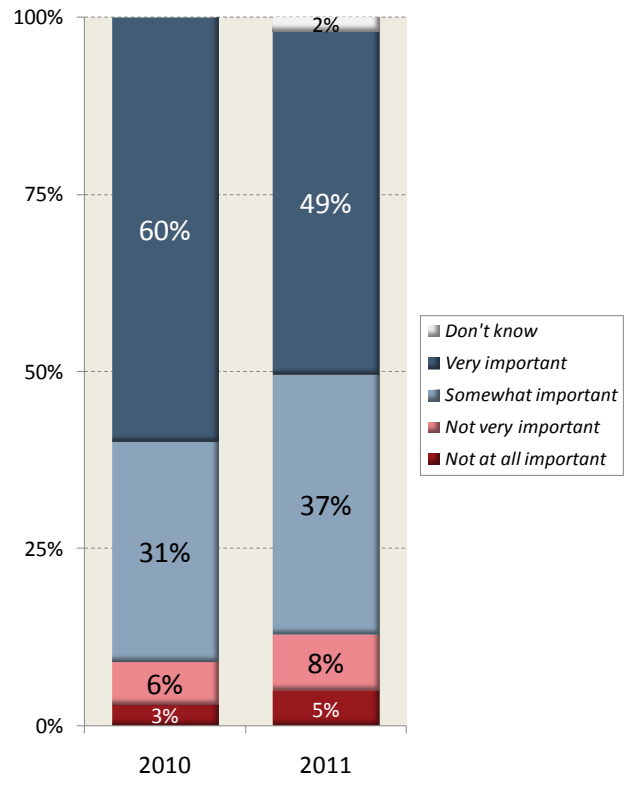


More likely to say "very important" (overall: 65%)  
 ✓ Females: 70%  
 ✓ Older residents (likelihood increases as age increases)

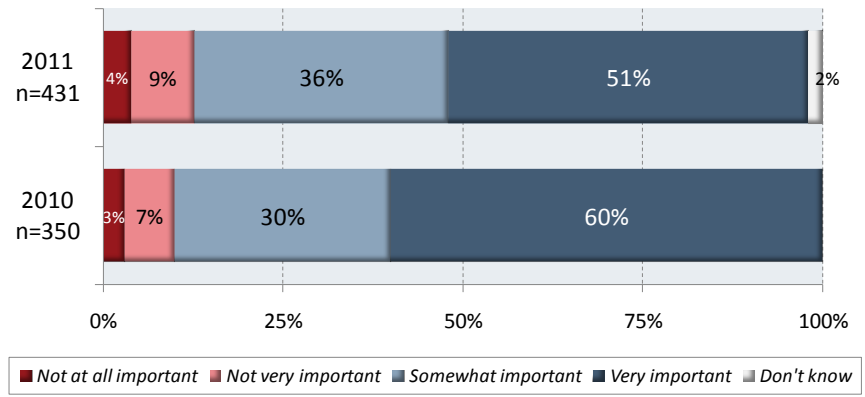
## 43. How important is for residents to ...?

### Use energy-efficient light bulbs

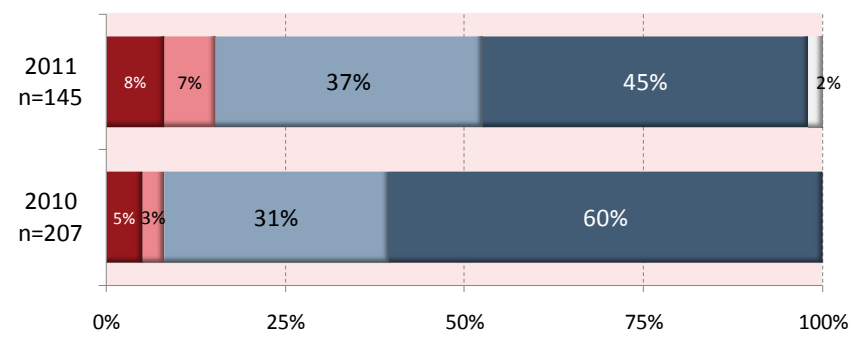
**Total Data**



**Participants**



**Non-participants**

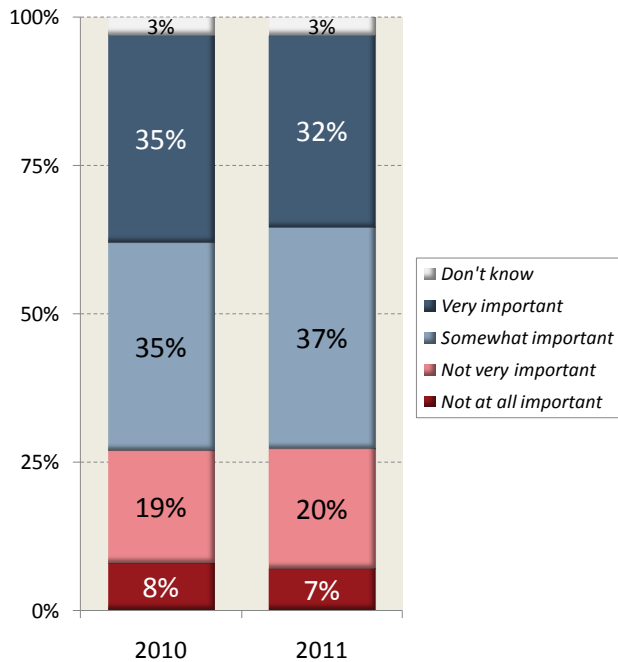


More likely to say "very important" (overall: 65%)  
 ✓ Lower household income (likelihood increases as income decreases)

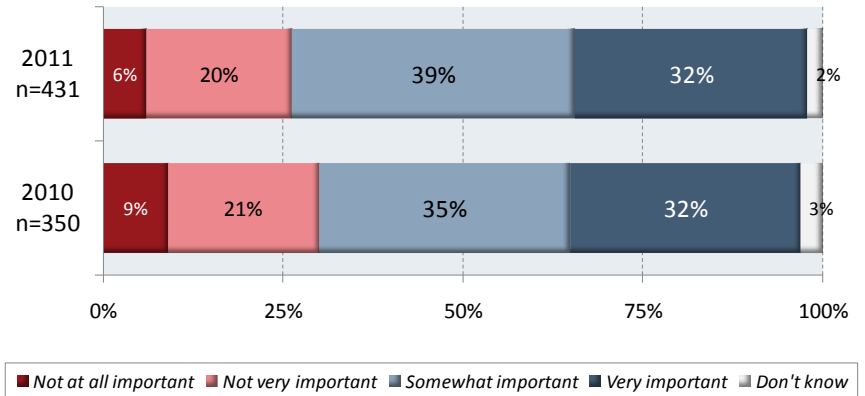
## 44. How important is it for residents to ...?

### Unplug appliances when away from home

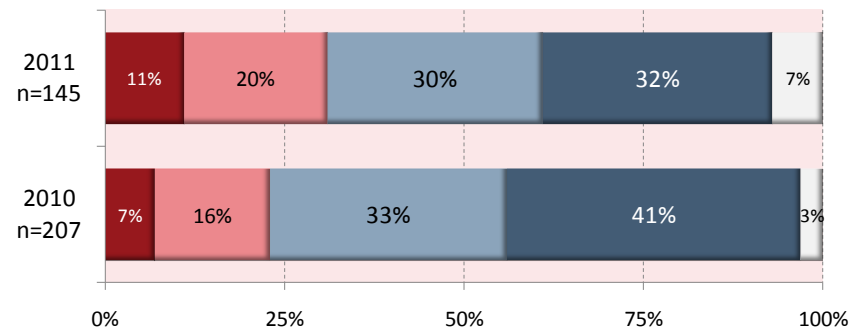
**Total Data**



**Participants**



**Non-participants**

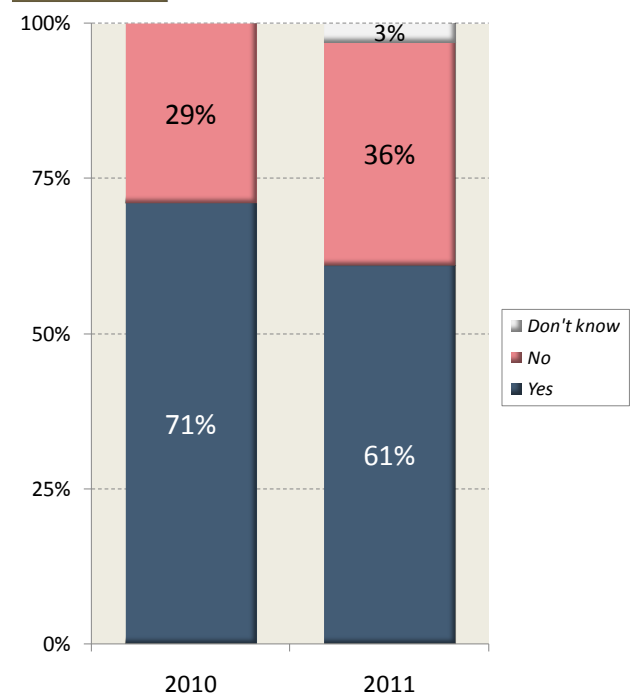


More likely to say "very important" (overall: 32%)

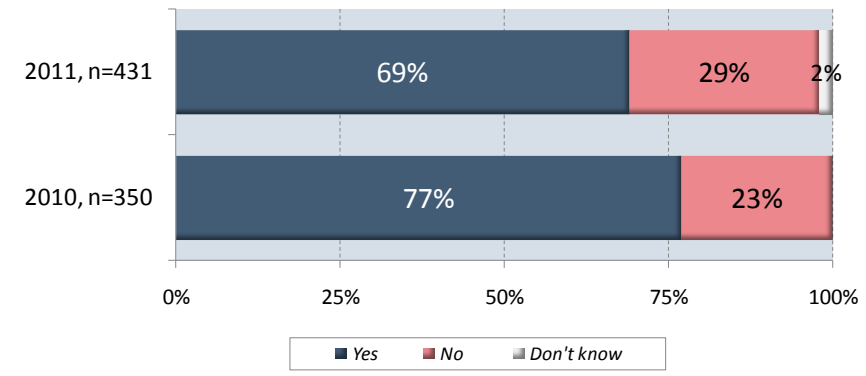
- ✓ Females: 39%
- ✓ Lower household income (likelihood increases as income decreases)
- ✓ Weber County residents: 42%
- ✓ Non-Wasatch Front residents: 44%

45. Are you aware of any programs offered by Rocky Mountain Power or Questar Gas to help you save energy or lower your utility bills?

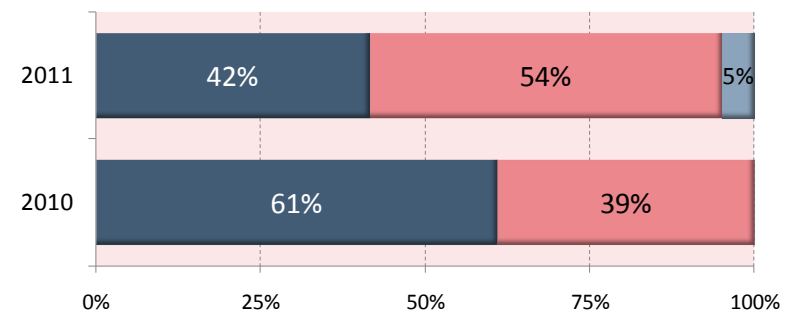
**Total Data**



**Participants**



**Non-participants**



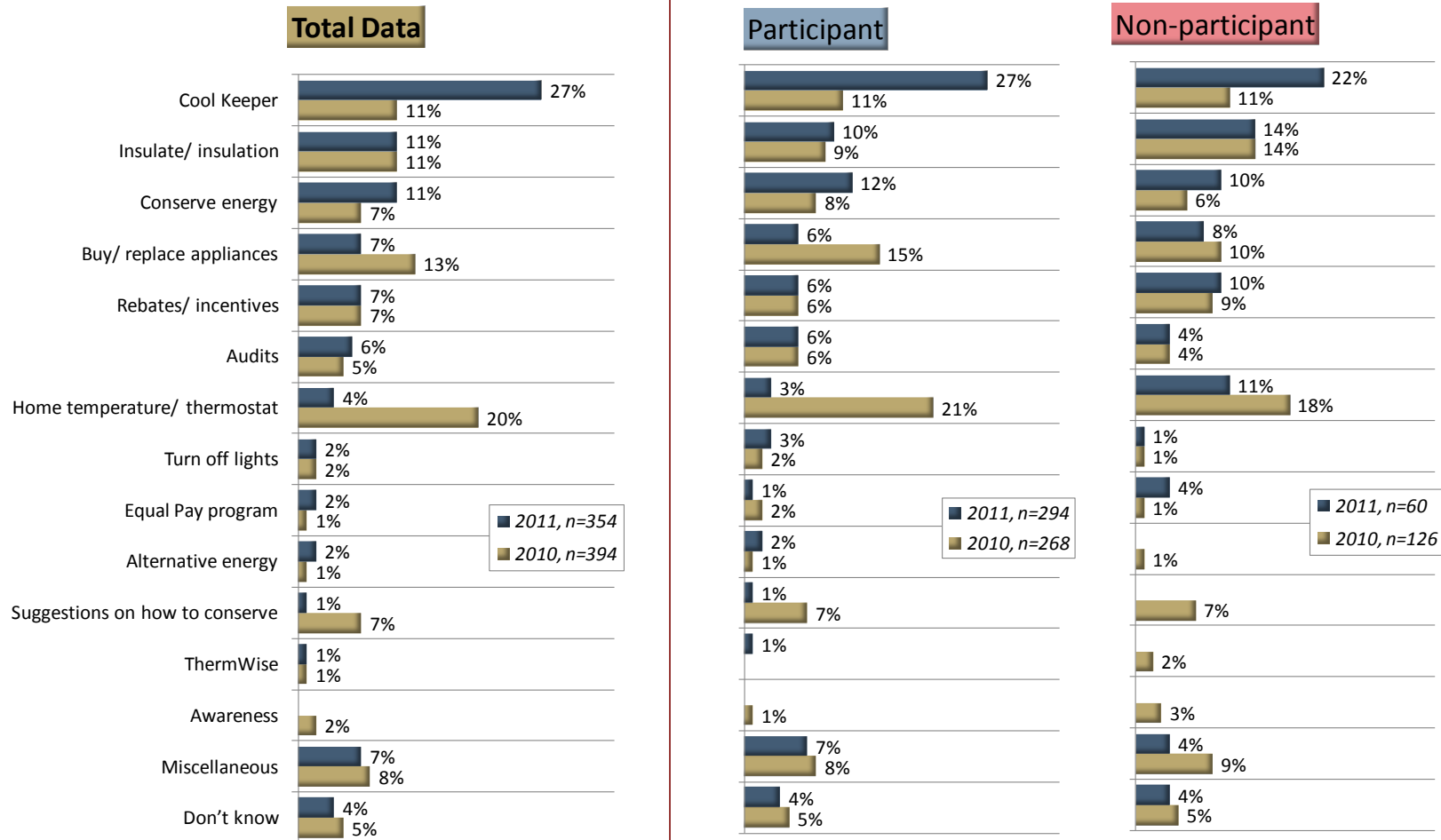
More likely to say "yes" (overall: 61%)

- ✓ Higher household income (likelihood increases as income increases)
- ✓ Davis County residents: 76%
- ✓ Utah County residents: 65%
- ✓ Salt Lake County residents: 66%



## 46. IF YES ON Q.45:

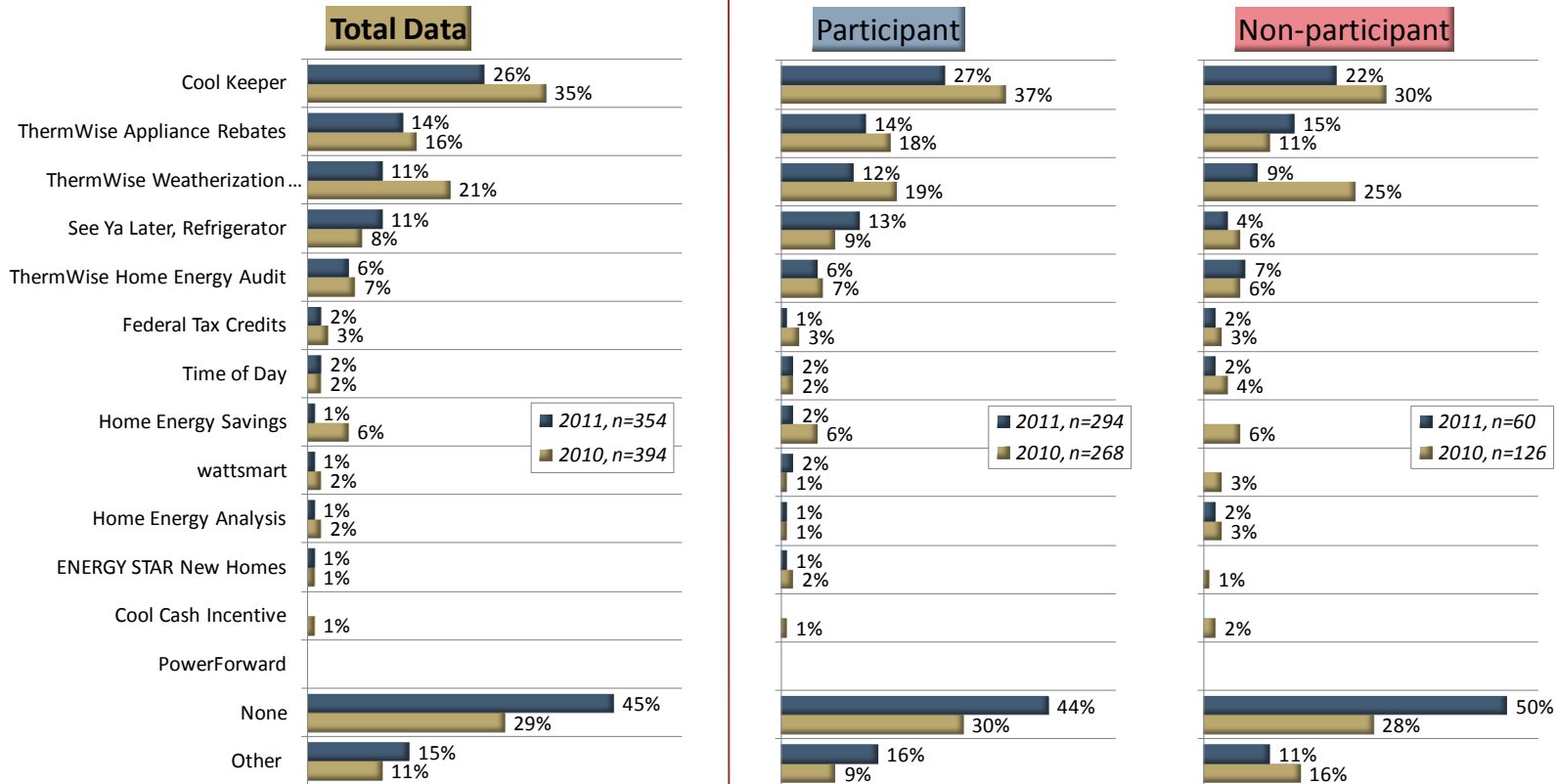
From what you know or have heard, what is it that these programs ask people to do?





## 47-61. IF YES ON Q.45:

What energy efficiency or conservation programs are you aware of from Rocky Mountain Power or Questar? Please name as many as you can think of.



More likely to say "Cool Keeper" (overall: 26%)

- ✓ Younger residents (likelihood increases as age decreases)
- ✓ Higher household income (likelihood increases as income increases)
- ✓ Weber County residents: 38%
- ✓ Utah County residents: 35%

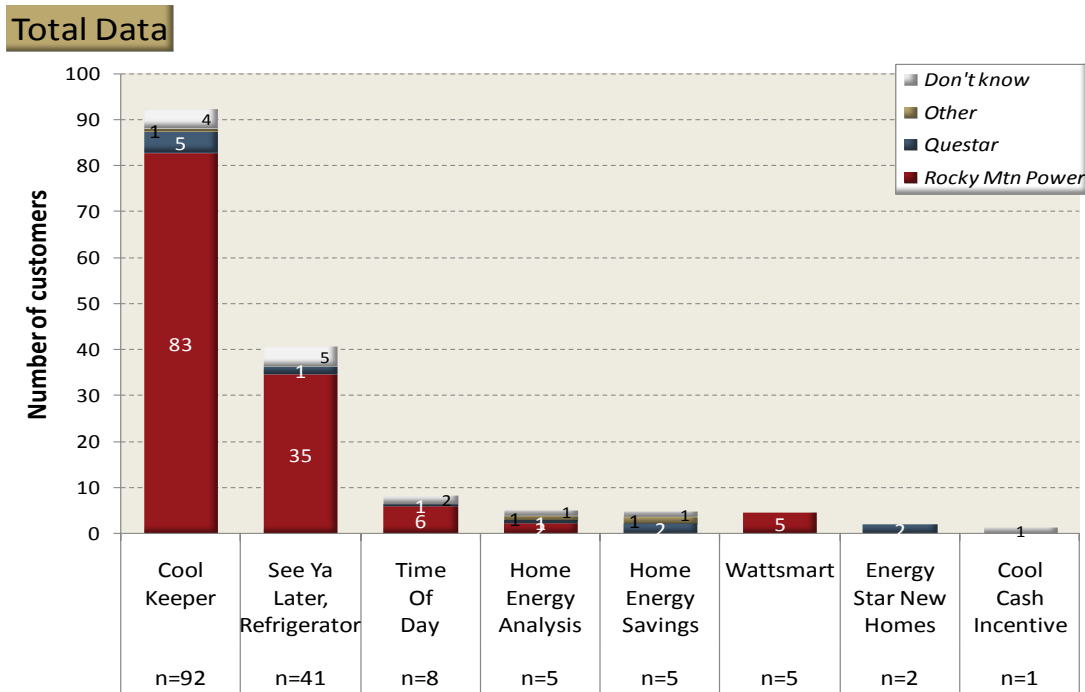
Less likely to say "Cool Keeper"

- ✓ Non-Wasatch Front residents: 9%



## 62-74. IF MENTIONED IN Q.47-Q.59:

From what you know or have heard, is Rocky Mountain Power or Questar Gas the sponsor of ...?



Note: Due to small sample sizes, only total data is illustrated.

### Cool Keeper

Less likely to say "Rocky Mountain Power" (overall: 90%)

- ✓ Household income less than \$40,000: 80%
- ✓ Household income greater than \$129,999: 68%
- ✓ Over age 64: 60%

### See Ya Later Refrigerator

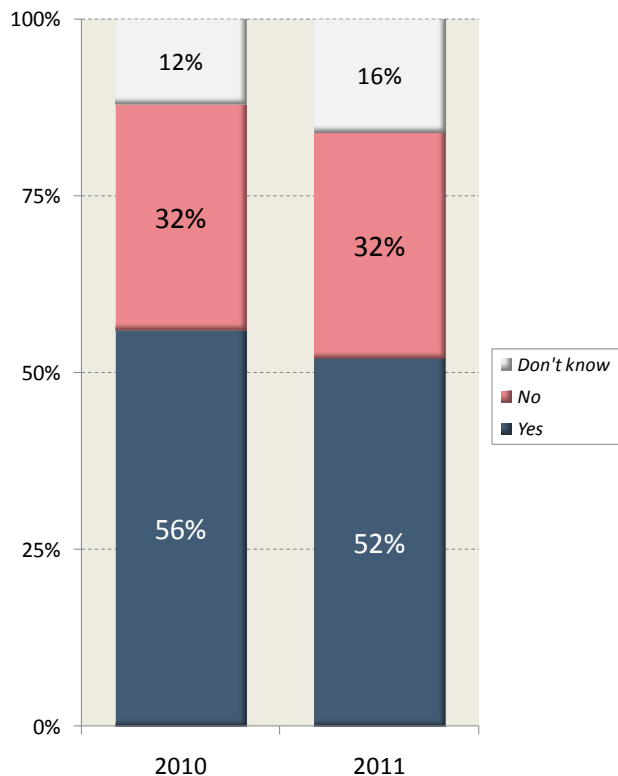
Less likely to say "Rocky Mountain Power" (overall: 85%)

- ✓ Residents with a whole-house evaporative cooler: 64%
- ✓ Non-Wasatch Front: 58%

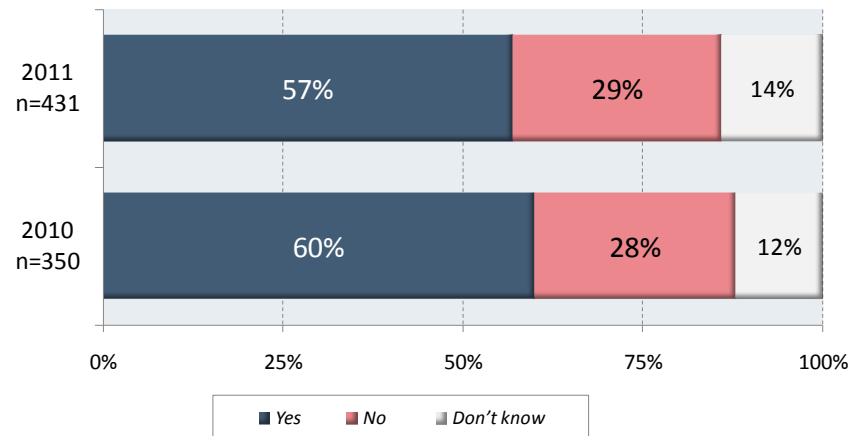


75. From what you know or have heard, do either Questar Gas or Rocky Mountain Power offer a service where an expert visits your home and assesses your energy efficiency?

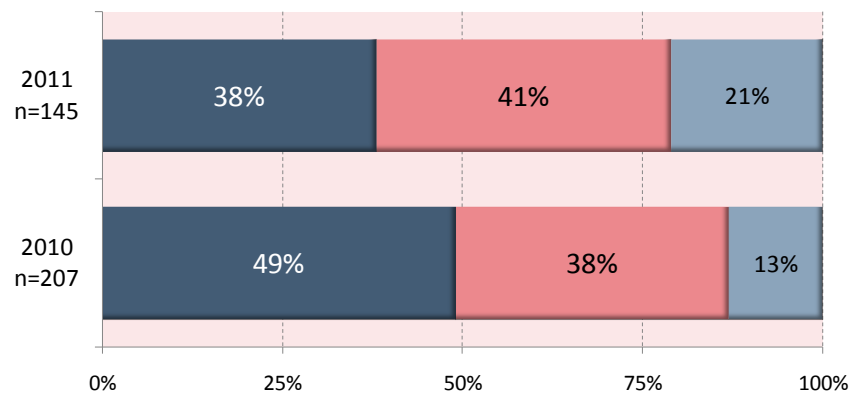
### Total Data



### Participants



### Non-participants



More likely to say "yes" (overall: 52%)

✓ Weber County residents: 69%

✓ Salt Lake County residents: 68%

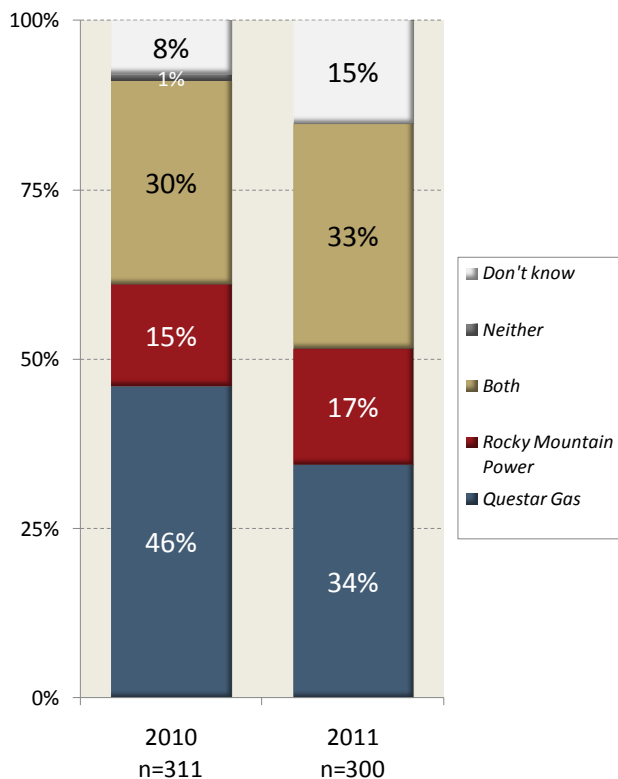




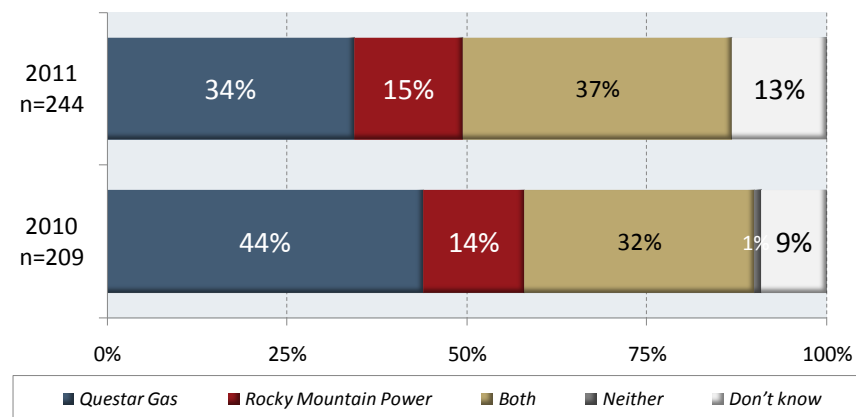
## 76. IF YES ON Q.75:

### Who offers this in-home service?

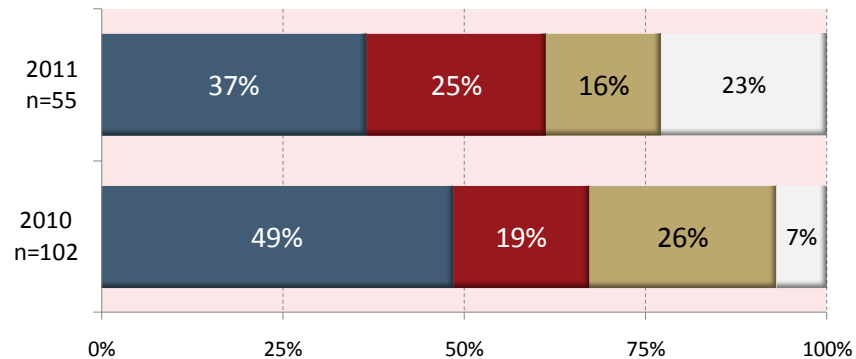
#### Total Data



#### Participants



#### Non-participants

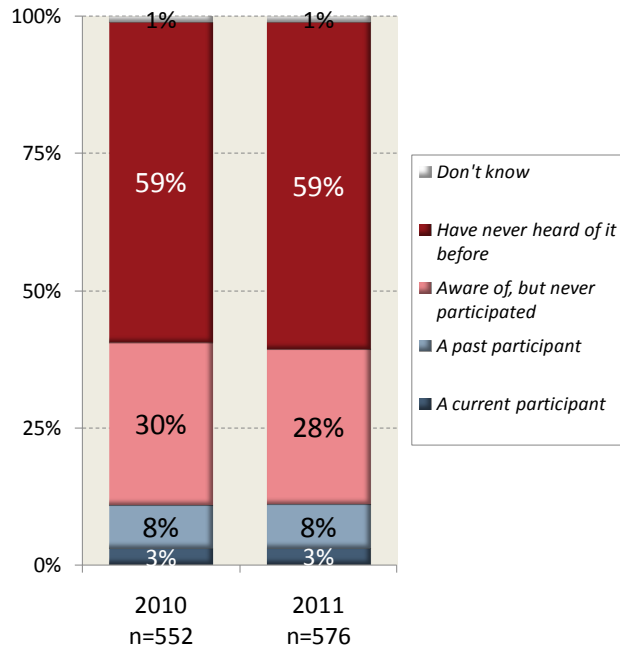


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

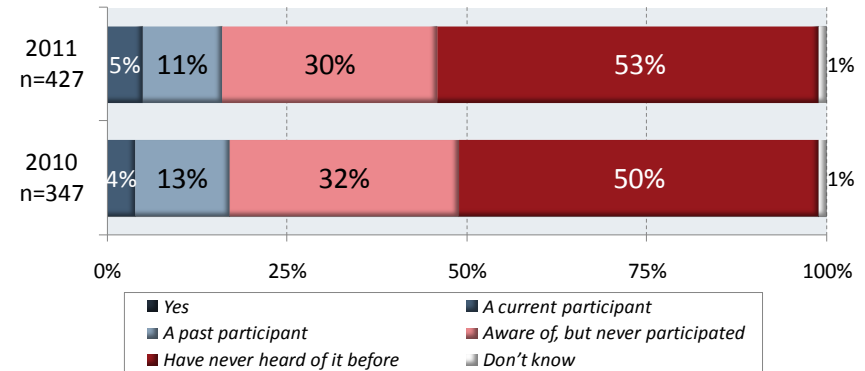
## Cool Cash Incentive

Rocky Mountain Power provides \$50 - \$300 to customers who install qualifying high-efficiency cooling systems.

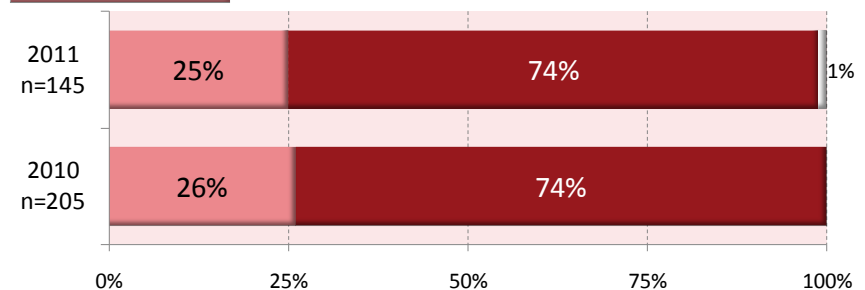
### Total Data



### Participants



### Non-participants



More likely to say "never heard of it before" (overall: 59%)

- ✓ Residents with whole-house central air conditioning: 51%
- ✓ Younger residents (likelihood increases as age decreases)
- ✓ Non-Wasatch Front residents: 71%

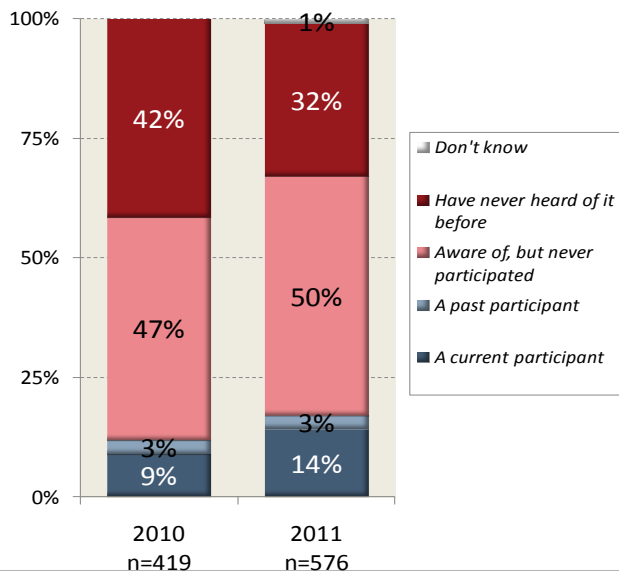


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

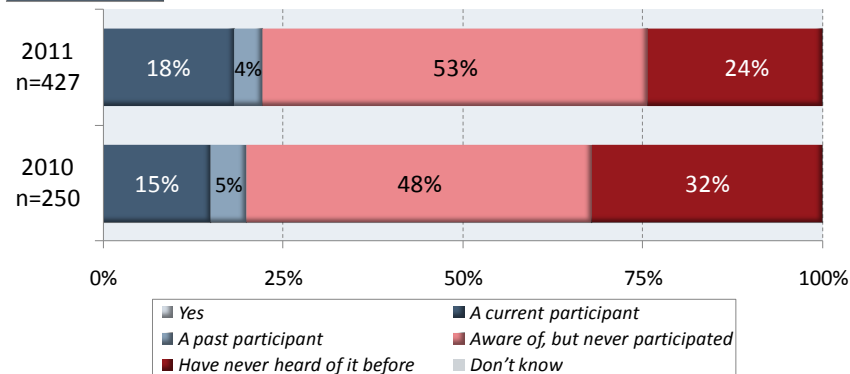
## Cool Keeper

Rocky Mountain Power installs a device that turns the air conditioner unit on and off in 15-minute segments during summer peak-usage hours. Participants receive a \$20 credit each year.

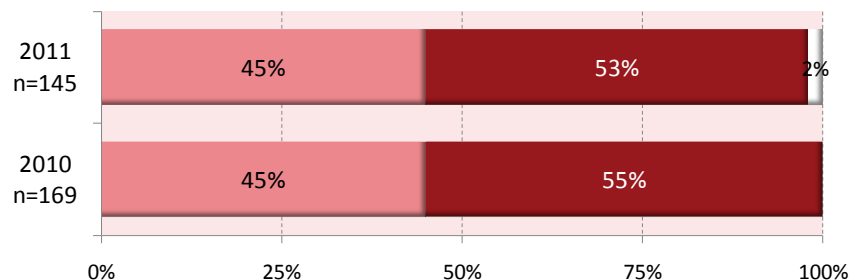
### Total Data



### Participants



### Non-participants



More likely to say "never heard of it" (overall: 32%)

- ✓ Residents with a whole-house evaporative cooler: 40%
- ✓ Under age 35: 44%
- ✓ Over age 64: 40%
- ✓ Non-Wasatch Front residents: 78%

More likely to say "current participant" (overall: 14%)

- ✓ Salt Lake and Weber County residents: 18%
- ✓ Age 55-64: 23%

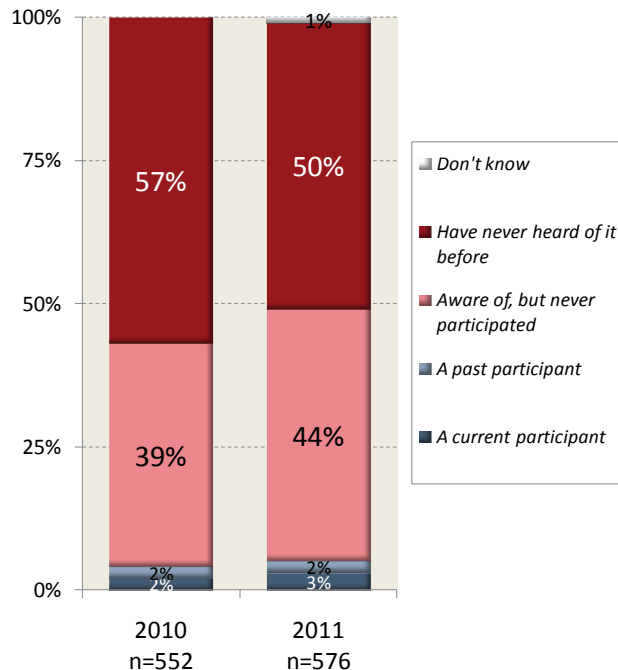


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

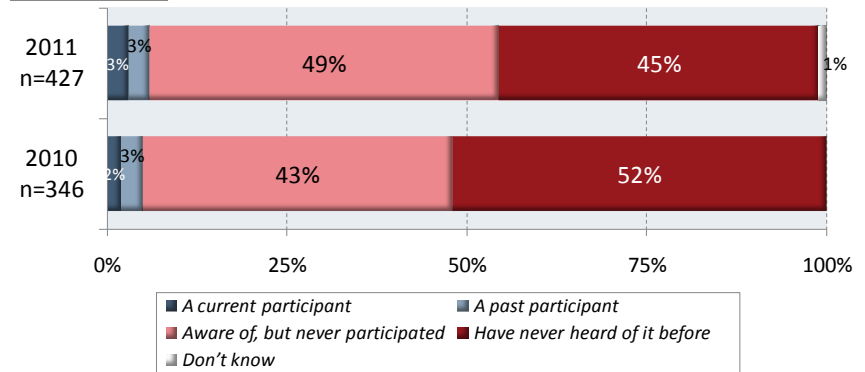
## Energy Star New Homes

*A program to promote certified, energy-efficient, new home construction.*

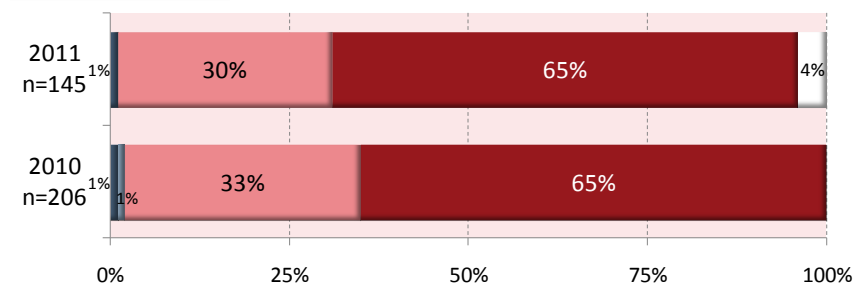
### Total Data



### Participants



### Non-participants



More likely to say "never heard of it" (overall: 50%)

- ✓ Females: 55%
- ✓ Lower household income (likelihood increases as income decreases)
- ✓ Utah County residents: 57%
- ✓ Non-Wasatch Front residents: 60%

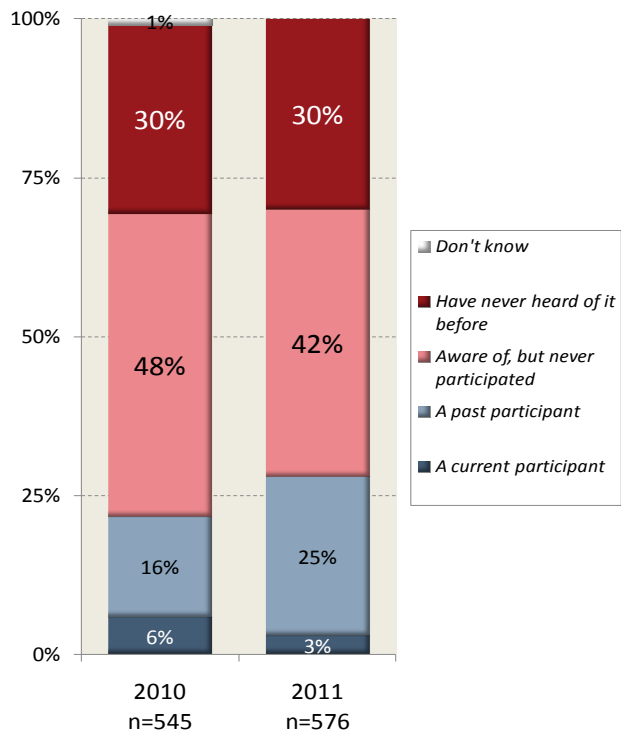


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

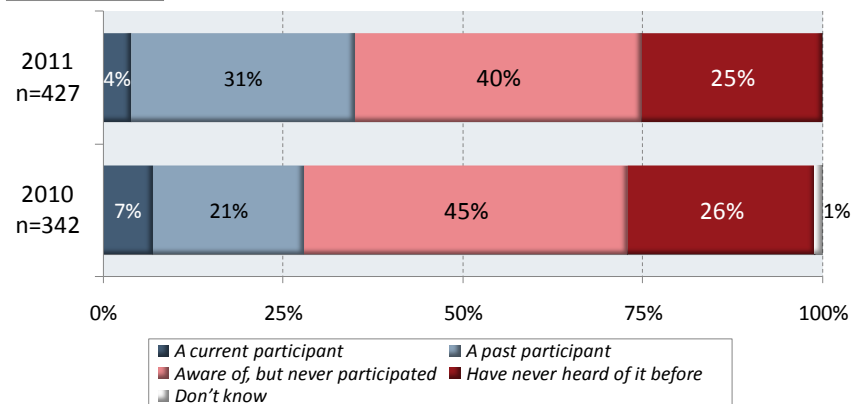
## Federal Tax Credits

*A program for an income tax credit for purchasing energy-efficient home products.*

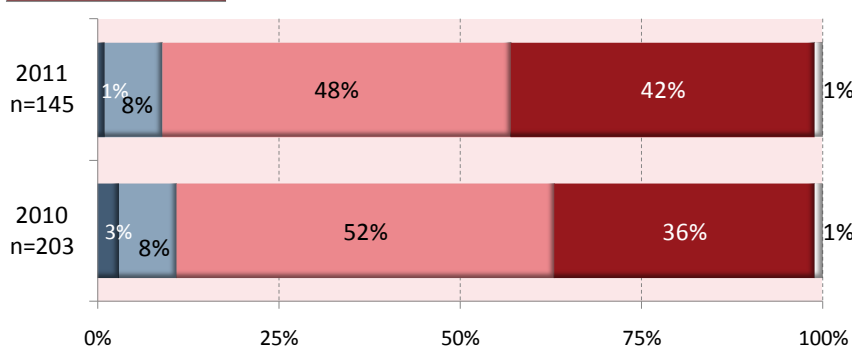
### Total Data



### Participants



### Non-participants



More likely to say "never heard of it" (overall: 30%)

- ✓ Lower household income (likelihood increases as income decreases)
- ✓ Non-Wasatch Front residents: 40%

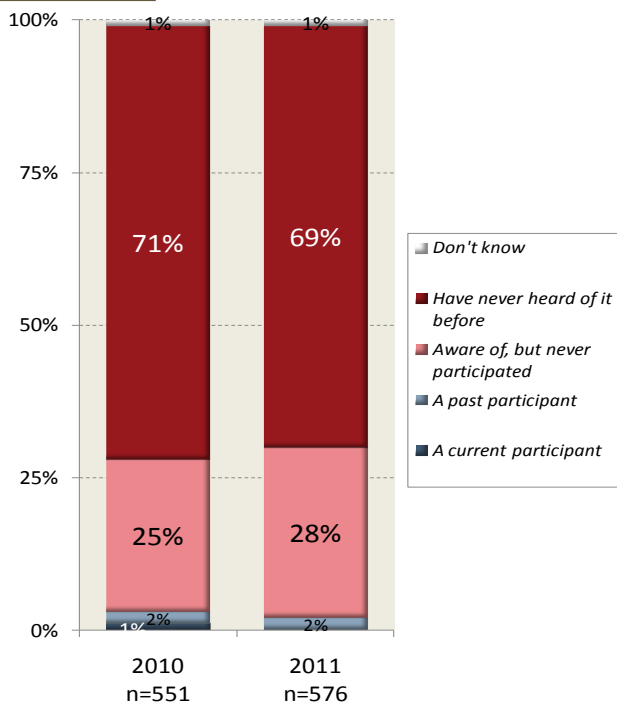


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

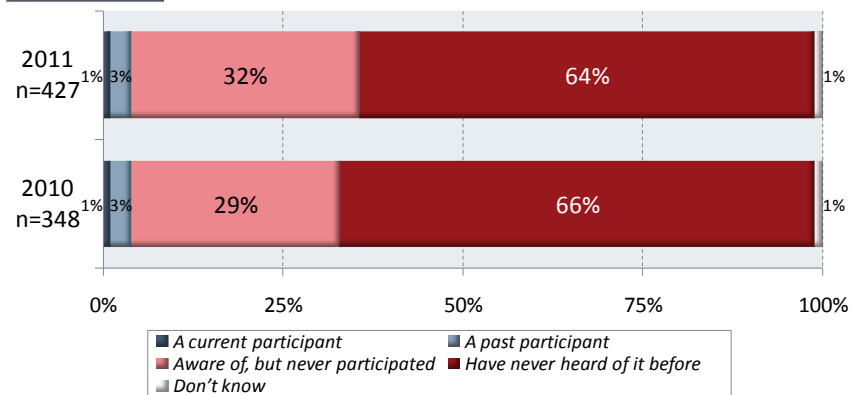
## Home Energy Analysis

*Rocky Mountain Power customers fill out a form about their home's energy usage and receive recommendations to make their home more energy efficient.*

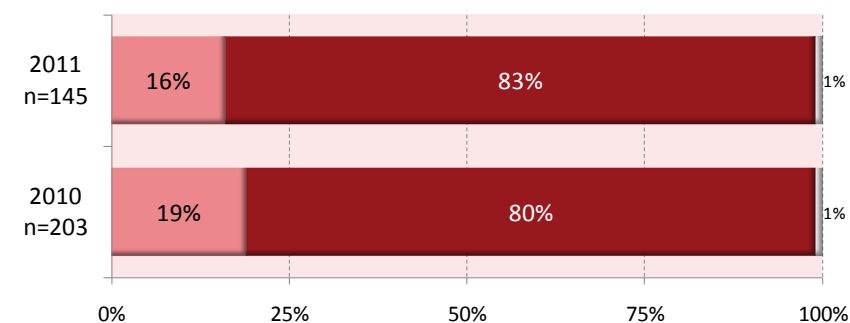
### Total Data



### Participants



### Non-participants



More likely to say "never heard of it" (overall: 69%)

✓ Age 35-54: 72%-73%

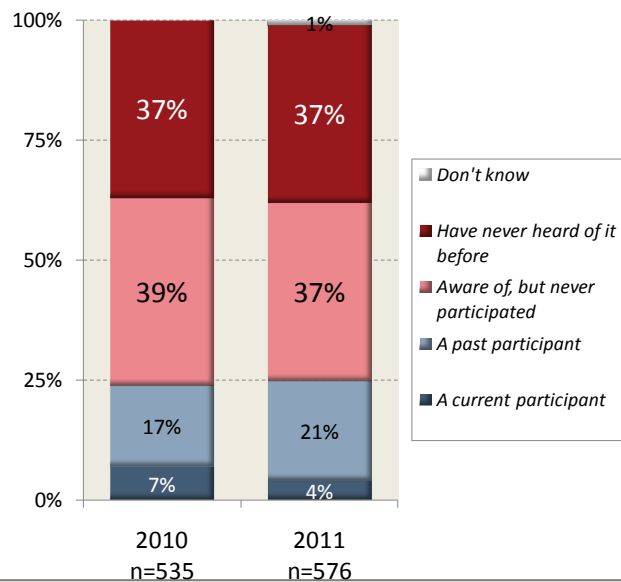


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

## Home Energy Savings

Rocky Mountain Power offers cash incentives to customers who buy energy-efficient electrical appliances for their home.

### Total Data



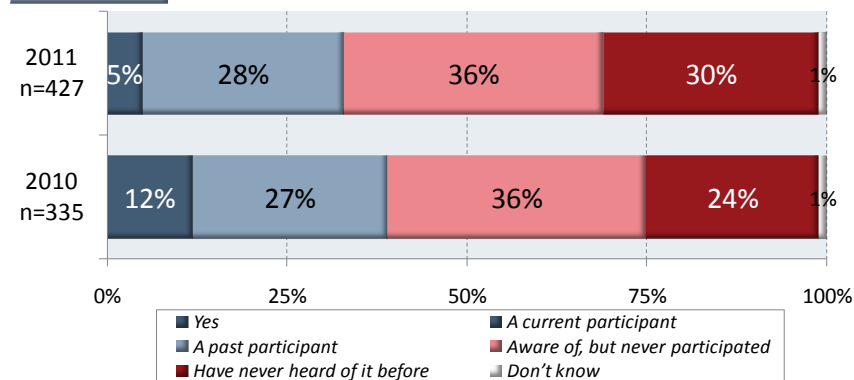
More likely to say "never heard of it" (overall: 37%)

- ✓ Males: 41%
- ✓ Younger residents (likelihood increases as age decreases)
- ✓ Lower household income (likelihood increases income decreases)
- ✓ Utah County residents: 51%

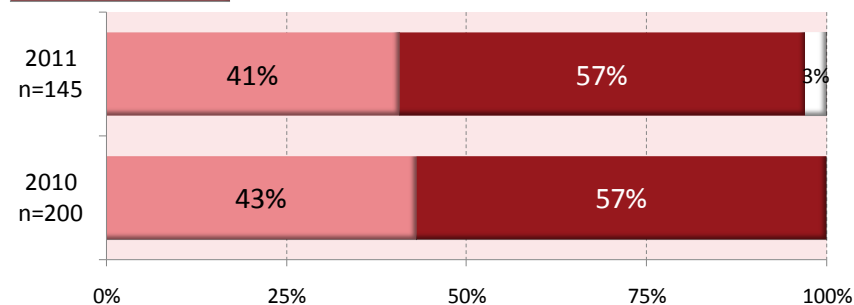
More likely to say "aware of, but never participated" (overall: 37%)

- ✓ Lower household income (likelihood increases income decreases)
- ✓ Salt Lake County residents: 42%
- ✓ Non-Wasatch Front residents: 41%

### Participants



### Non-participants



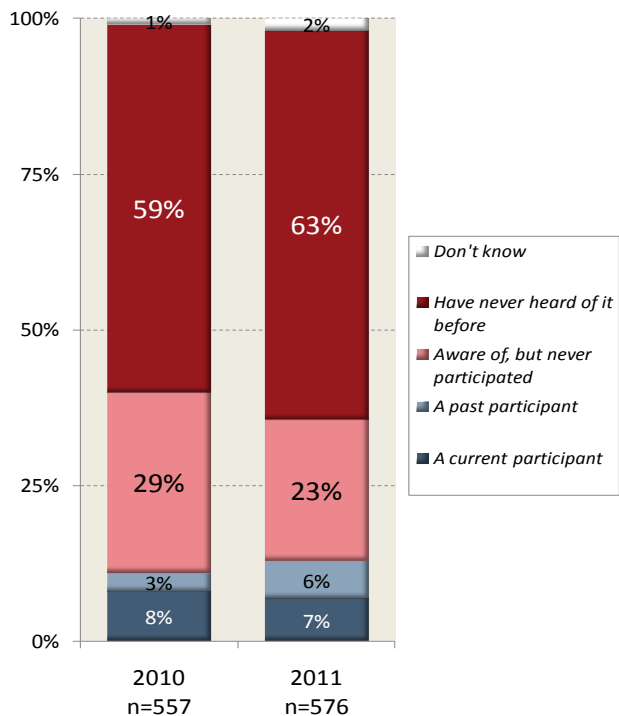


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

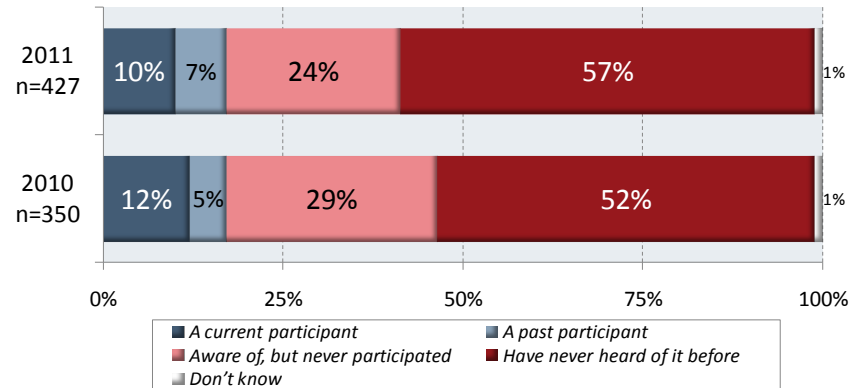
## PowerForward

Rocky Mountain Power notifies Utahns of "Green," "Yellow," and "Red" days and appropriate conservation measures.

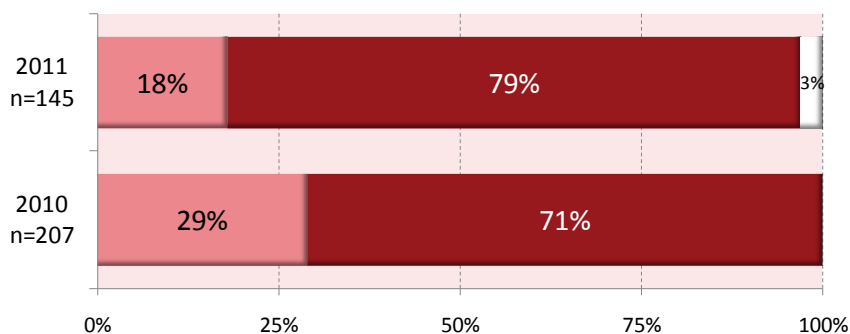
### Total Data



### Participants



### Non-participants



More likely to say "never heard of it" (overall: 65%)

- ✓ Residents with central air conditioning: 65%
- ✓ Younger residents (likelihood increases as age decreases)



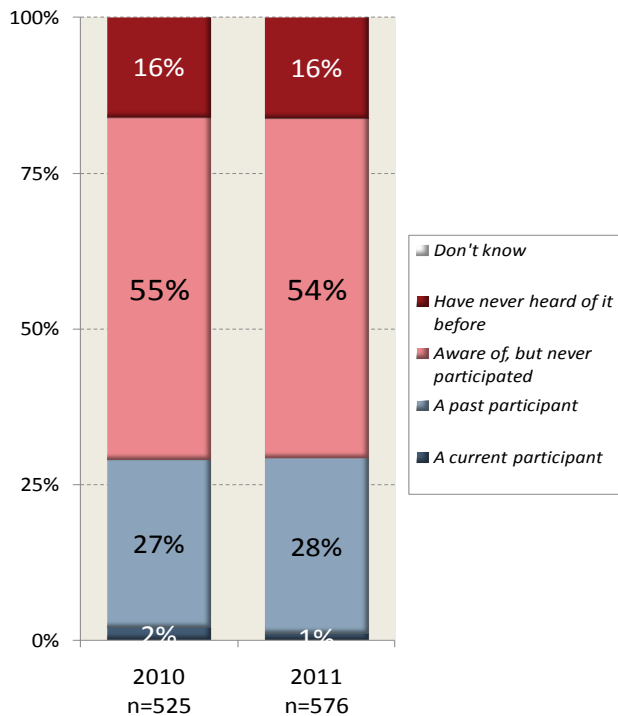


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

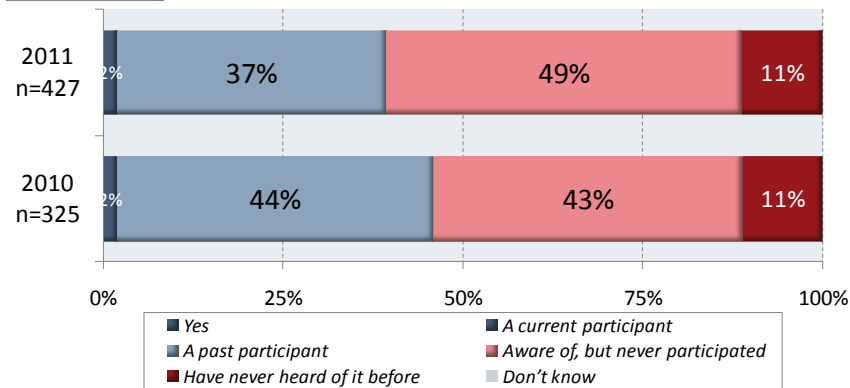
## See Ya Later, Refrigerator

Rocky Mountain Power picks up and recycles your old working refrigerator or freezer. Participants receive \$30.

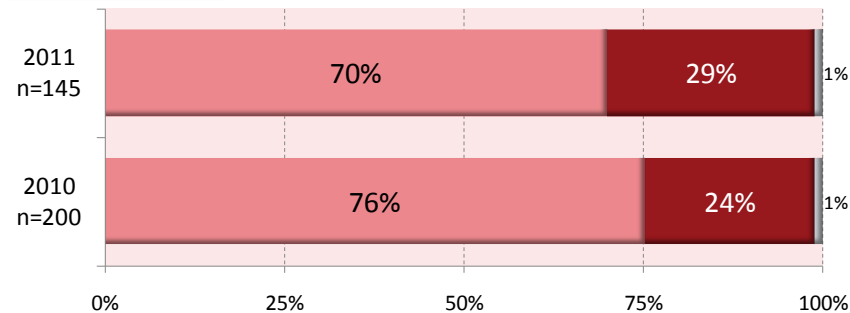
### Total Data



### Participants



### Non-participants



More likely to say "past participant" (overall: 28%)

- ✓ Females: 32%
- ✓ Older residents (likelihood increases as age increases)
- ✓ Salt Lake County residents: 33%

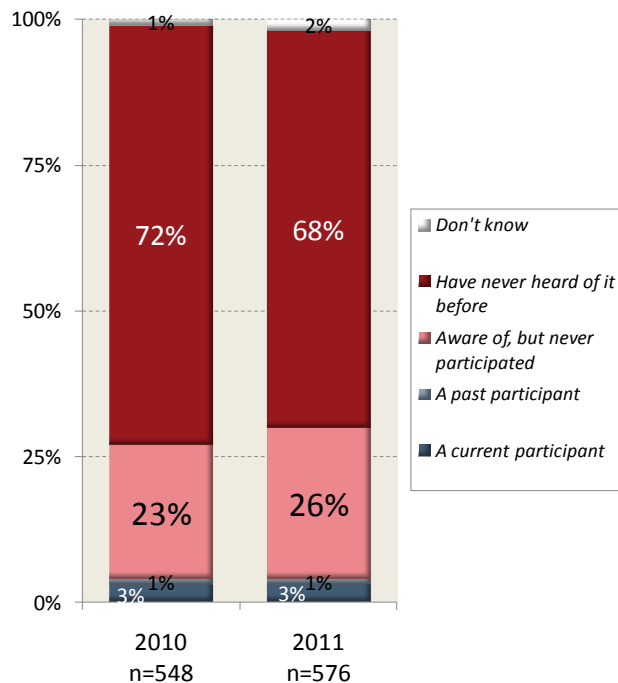


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

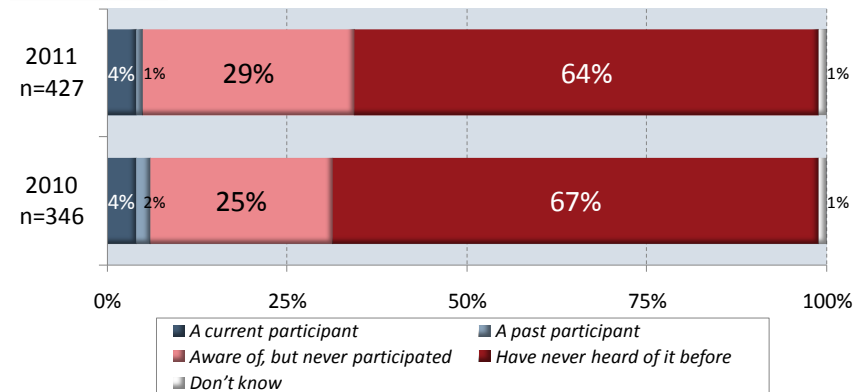
## Time of Day

*A Rocky Mountain Power program that lets customers sign up to pay for electricity depending if it is used during on-peak or off-peak hours.*

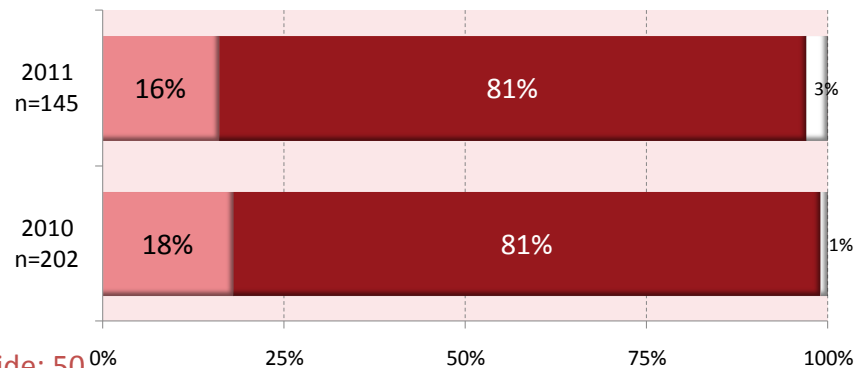
### Total Data



### Participants



### Non-participants



**Less likely** to say "never heard of it" (overall: 68%)

- ✓ Residents with a whole-house evaporative cooler: 65%
- ✓ Younger residents (likelihood increases as age decreases)
- ✓ Non-Wasatch Front residents: 78%

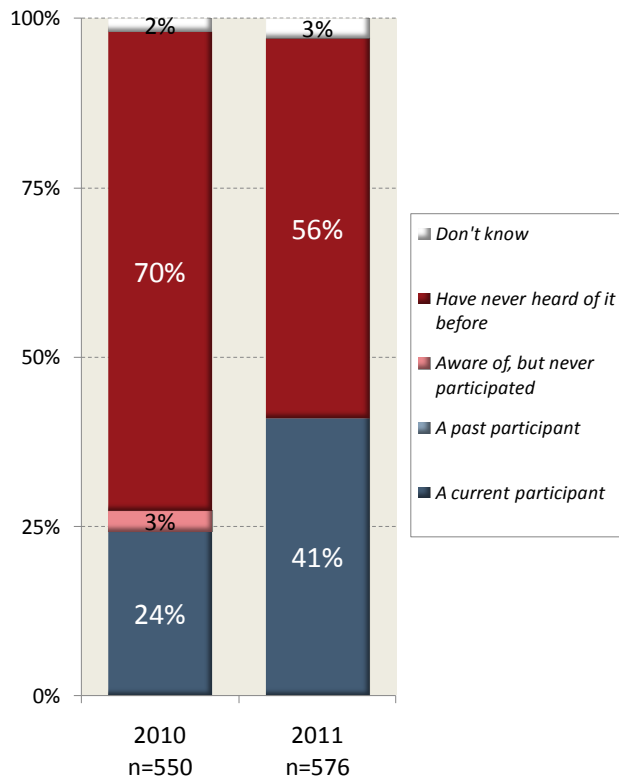


77-89. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power or Questar Gas. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

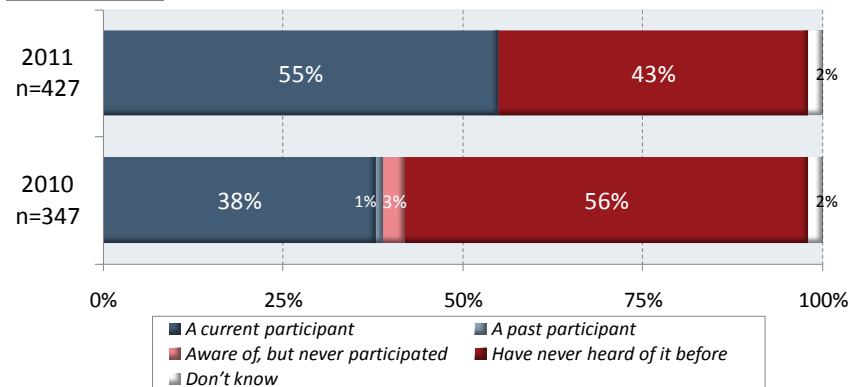
## wattsmart

*Rocky Mountain Power's effort to promote energy-efficiency and conservation and to educate customers on saving money on their utility bills.*

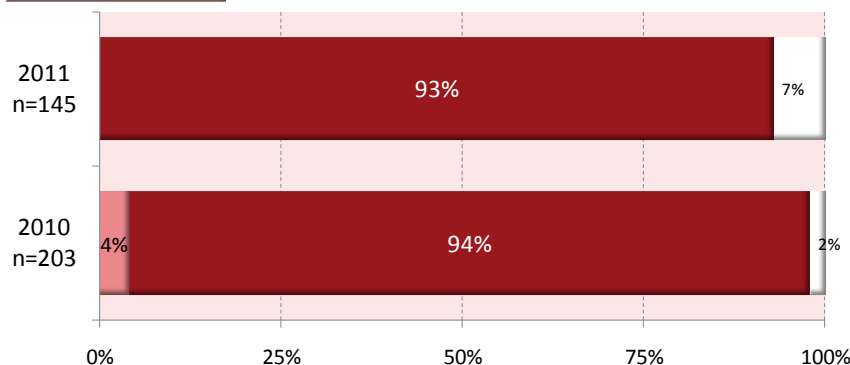
### Total Data



### Participants



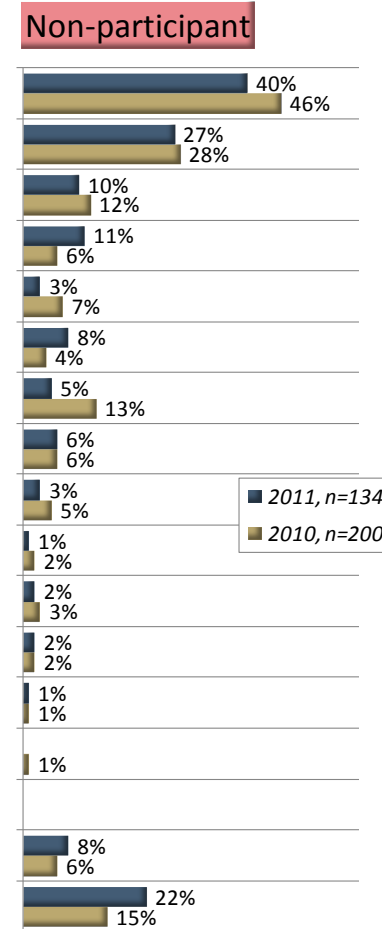
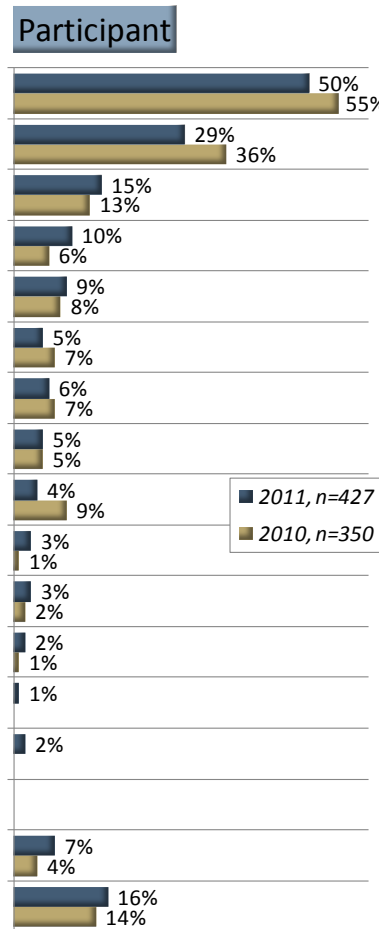
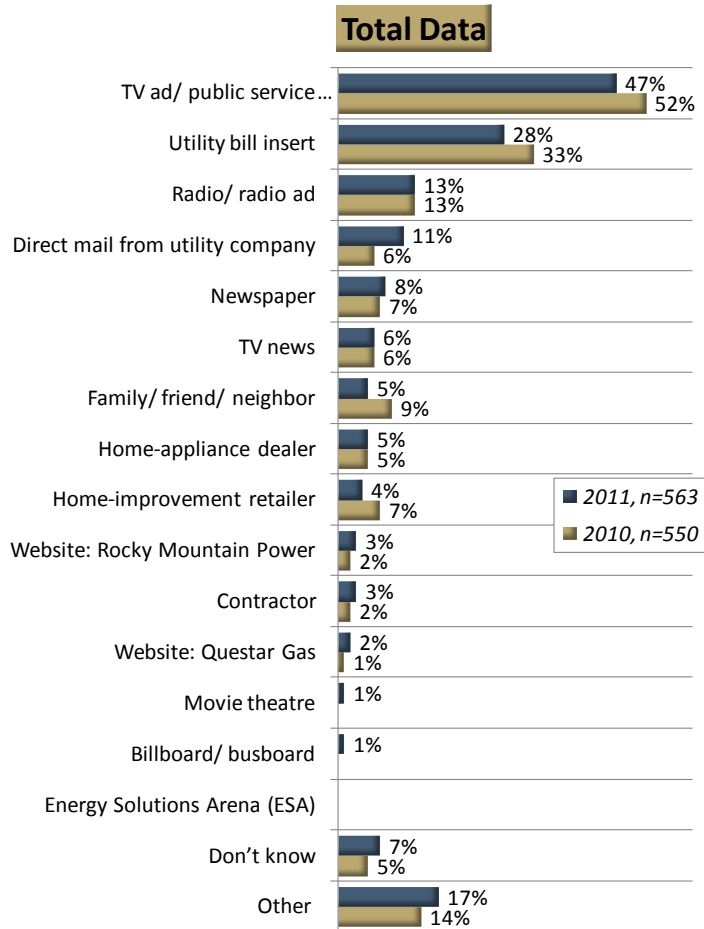
### Non-participants





## 90-106. IF AWARE OF ANY PROGRAM:

### Where did you first see or hear about these energy-savings programs?

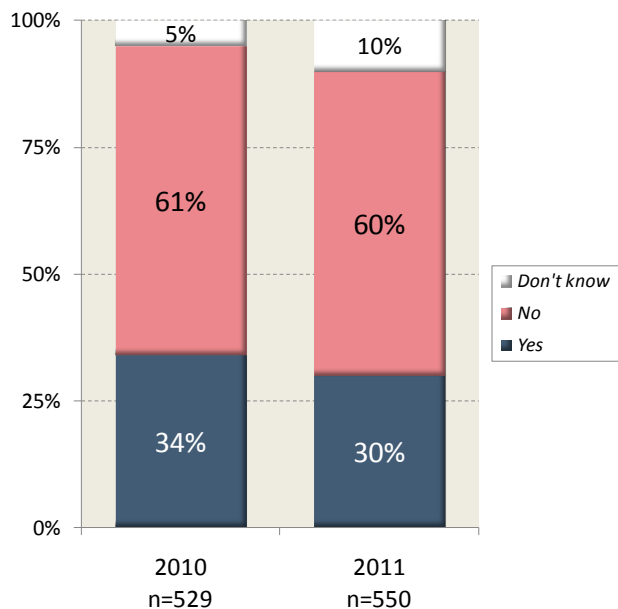


# Likelihood to Participate

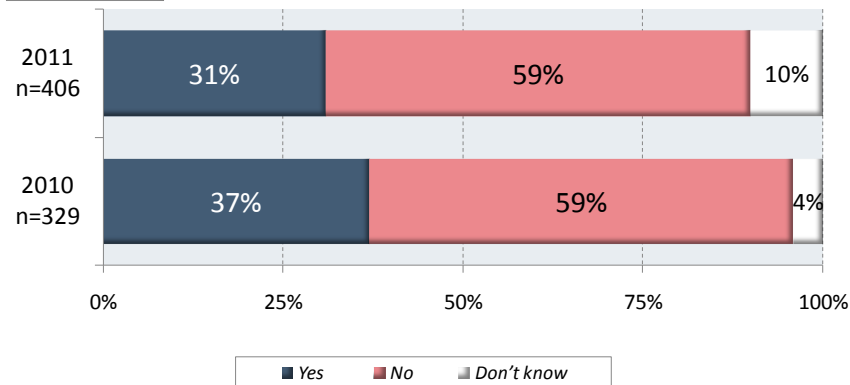
## 107. IF NEVER HEARD OF/ NOT PARTICIPATED ON Q.82 (HOME ENERGY AUDIT):

Do you think you or someone in your household might request a home energy audit in the upcoming year?

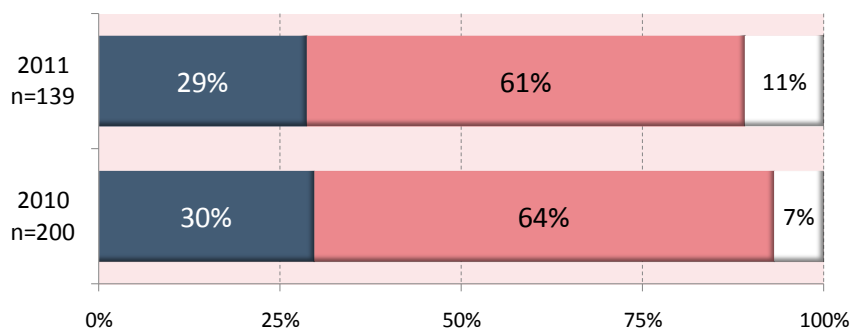
### Total Data



### Participants



### Non-participants



More likely to say "yes" (overall: 30%)

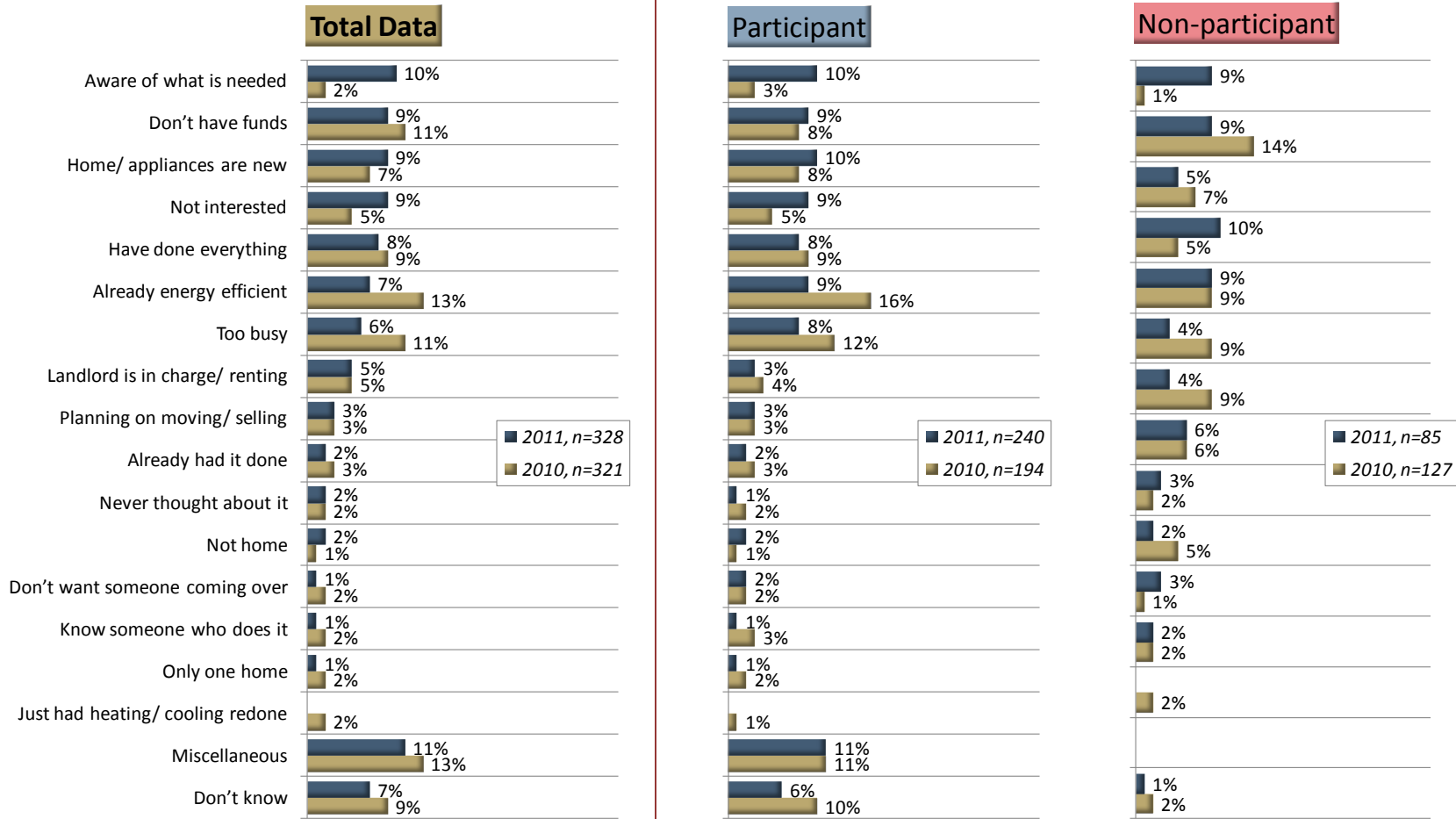
- ✓ Age 35-44: 44%
- ✓ Household income of \$60,000-\$89,999: 43%
- ✓ Household income of \$40,000-\$59,999: 41%

More likely to say "no" (overall: 60%)

- ✓ Over age 64: 81%
- ✓ Household income less than \$40,000: 79%

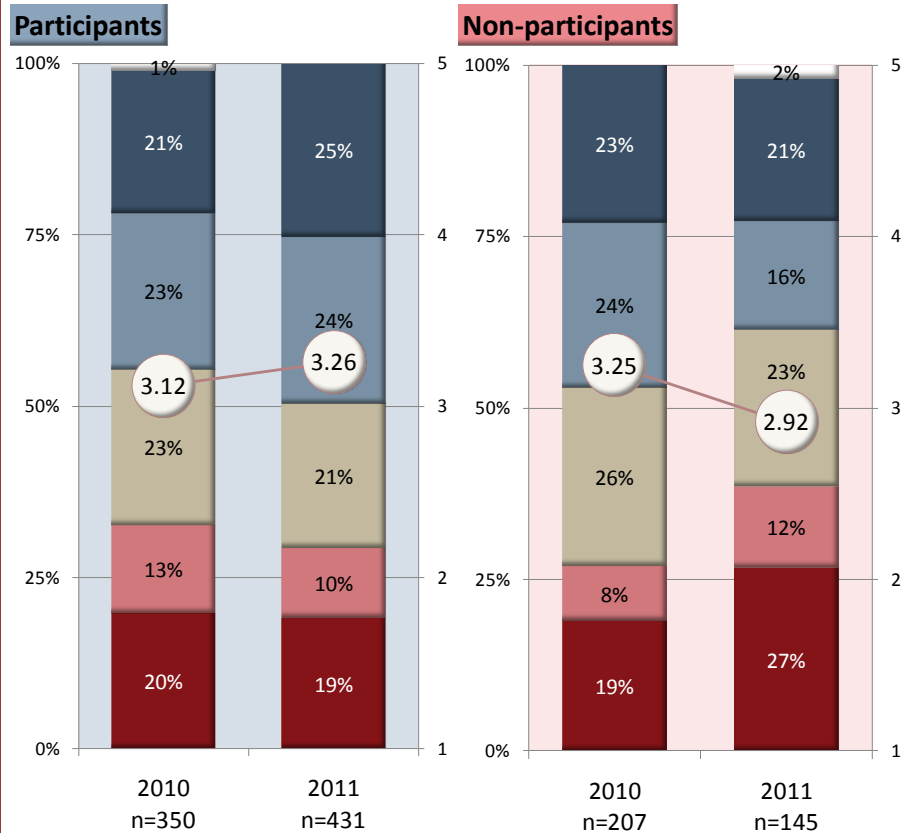
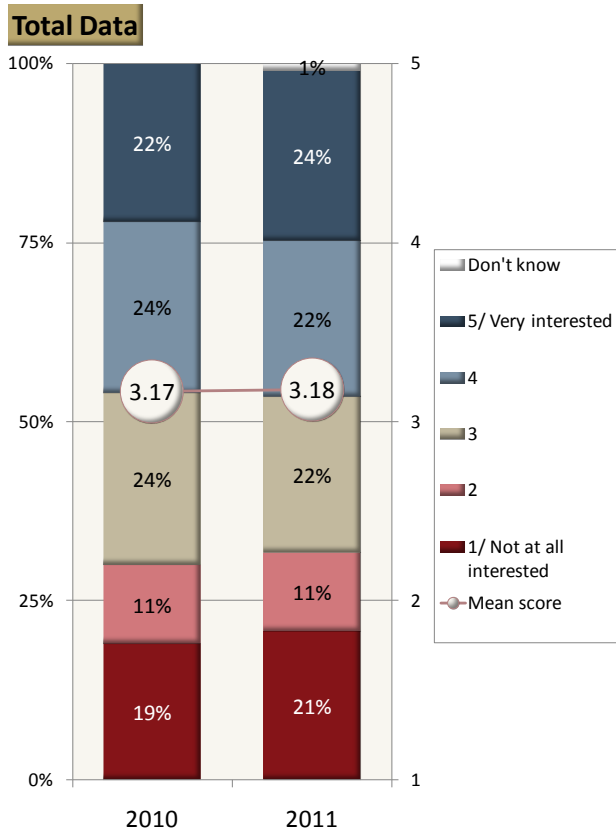


## 108. IF NO ON Q.107: Why not?





109. How interested do you think you or someone in your household would be in using a free online tool that would allow you to perform your own home energy assessment?

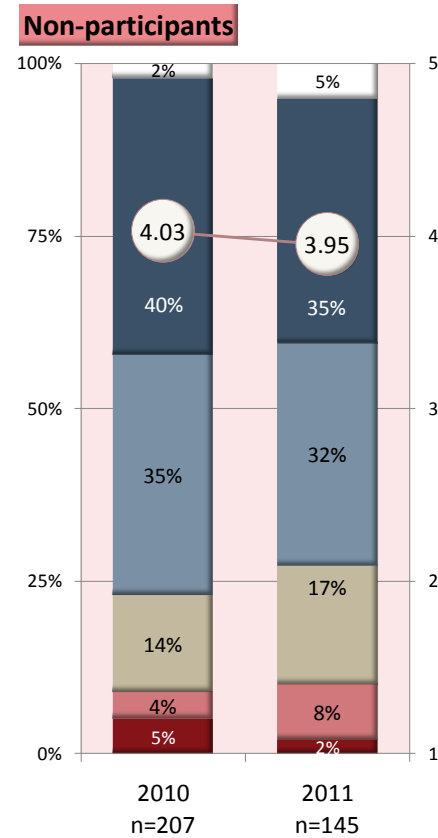
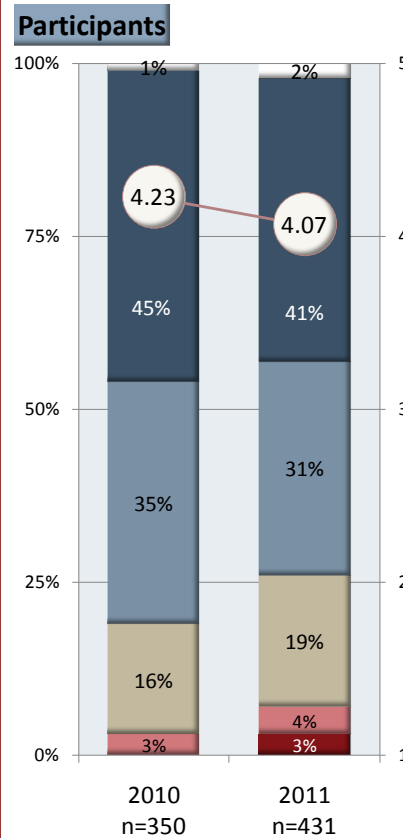
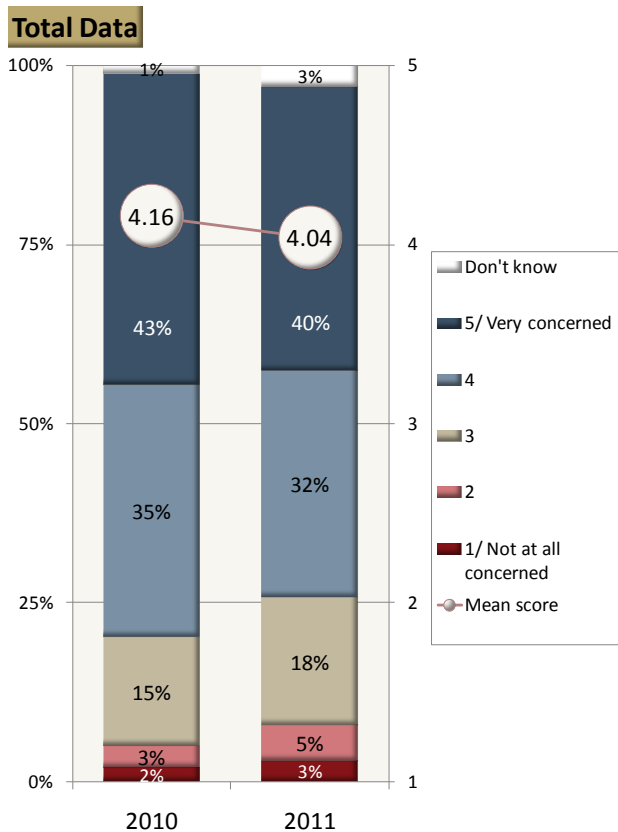


More likely to say "very interested" (overall: 24%)  
 ✓ Younger residents, especially those age 45-44: 33%

# Utility Company Perceptions

(Scale: 1/Not at all concerned to 7/Very concerned)

110. From what you know or have heard, how concerned is **Rocky Mountain Power** about conserving energy?



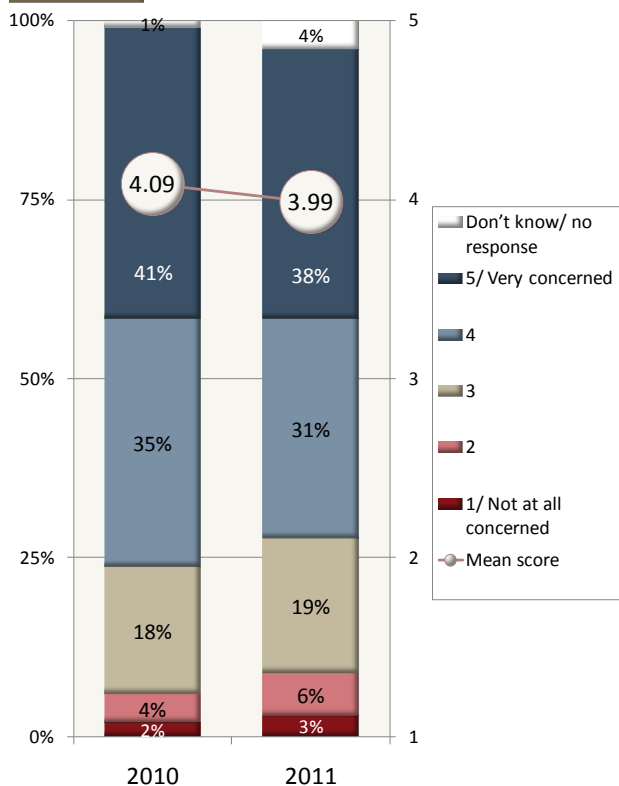
More likely to say "very concerned" (overall: 40%)  
 ✓ Females: 47%  
 ✓ Lower household income (likelihood increases as income decreases)



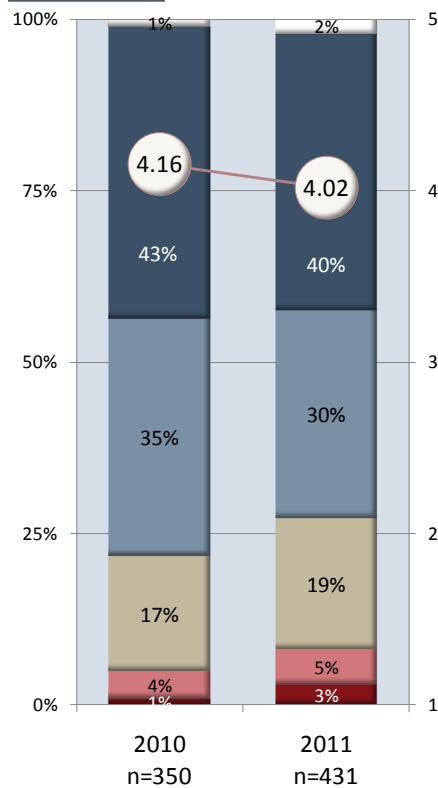


## 111. From what you know or have heard, how concerned is **Questar Gas** about conserving energy?

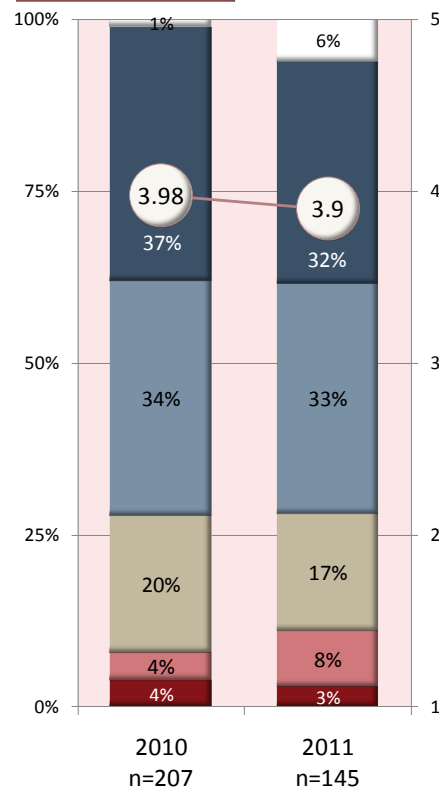
**Total Data**



**Participants**



**Non-participants**



More likely to say "very concerned" (overall: 38%)

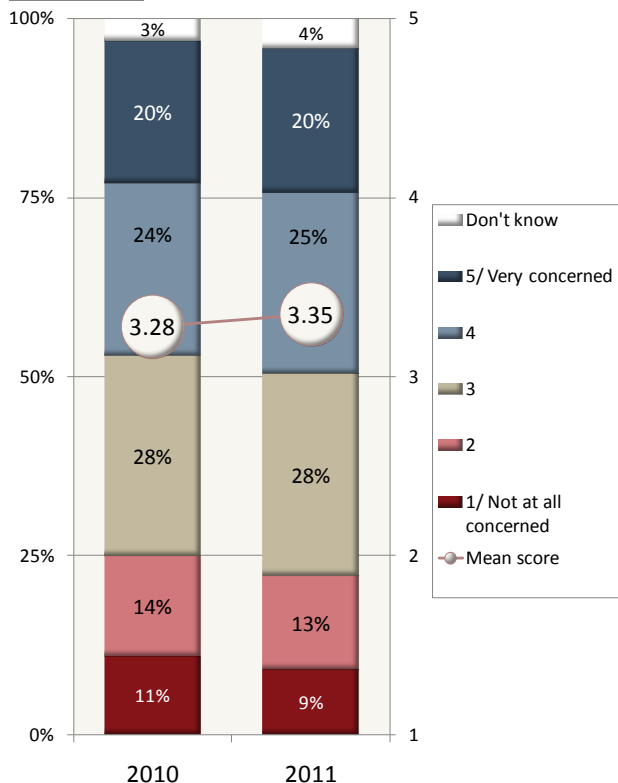
✓ Females: 45%

✓ Older residents (likelihood increases as age increases)

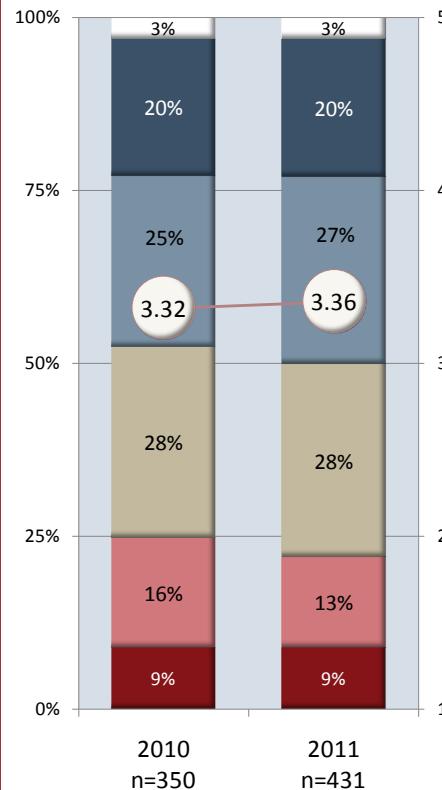


## 112. How concerned do you think Rocky Mountain Power is about finding ways to keep their rates as low as possible?

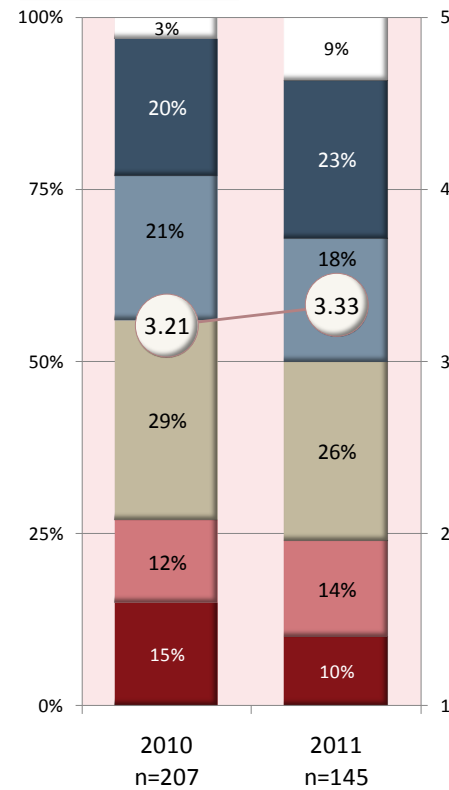
**Total Data**



**Participants**



**Non-participants**



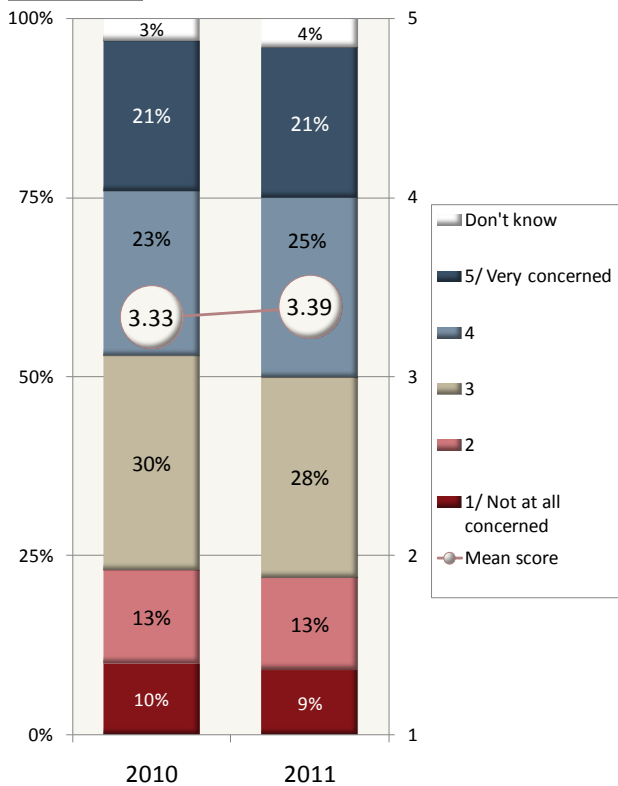
More likely to say "very concerned" (overall: 20%)

- ✓ Females: 25%
- ✓ Residents with a whole-house evaporative cooler: 24%
- ✓ Higher household income (likelihood increases as income increases)

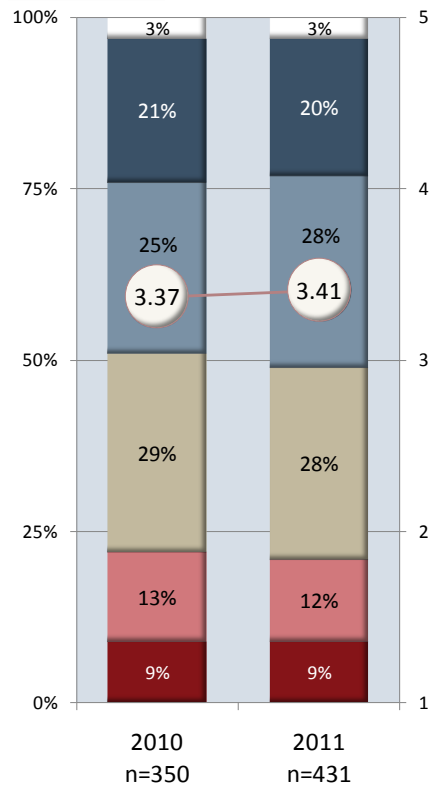


## 113. How concerned do you think **Questar Gas** is about finding ways to keep their rates as low as possible?

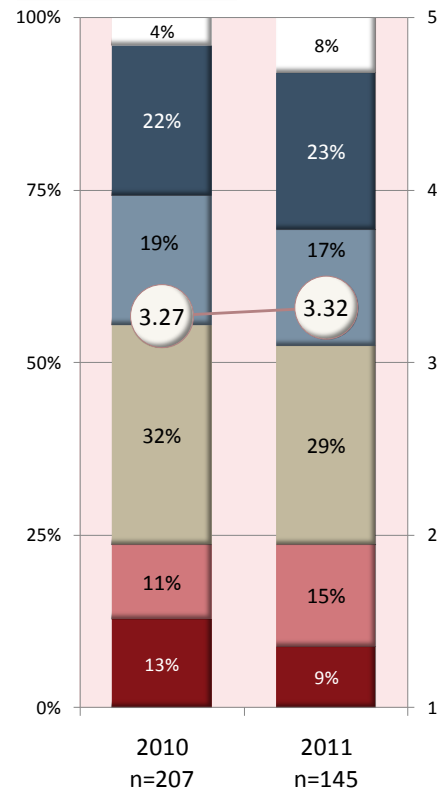
**Total Data**



**Participants**



**Non-participants**

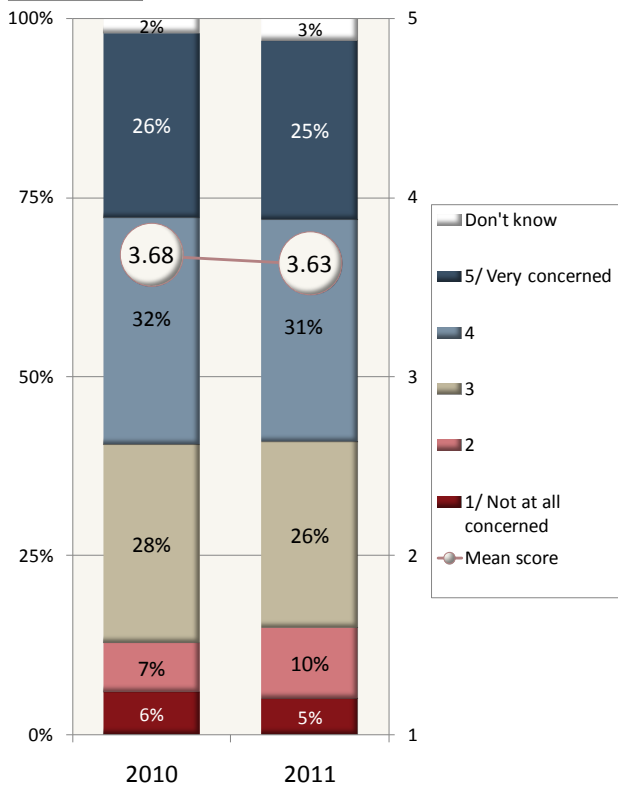


More likely to say "very concerned" (overall: 21%)  
 ✓ Higher household income (likelihood increases as income increases)

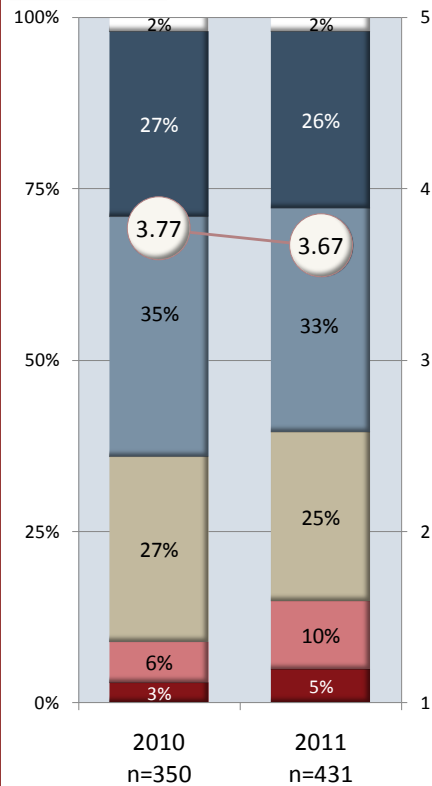


## 114. How concerned do you think Rocky Mountain Power is about helping customers save money through saving energy?

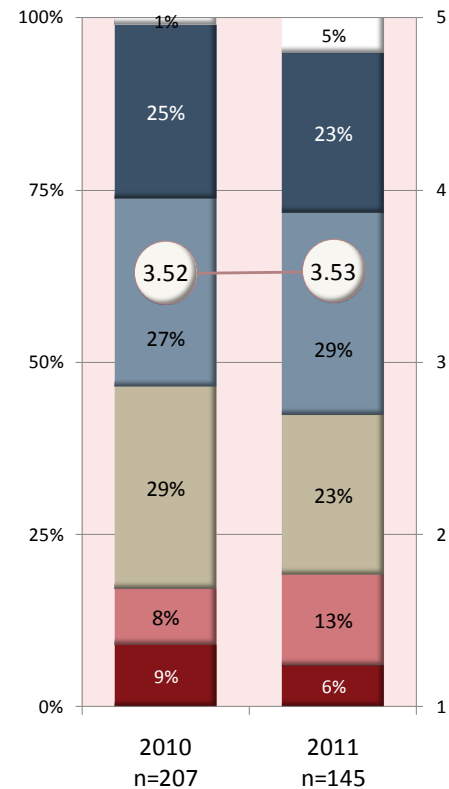
### Total Data



### Participants



### Non-participants

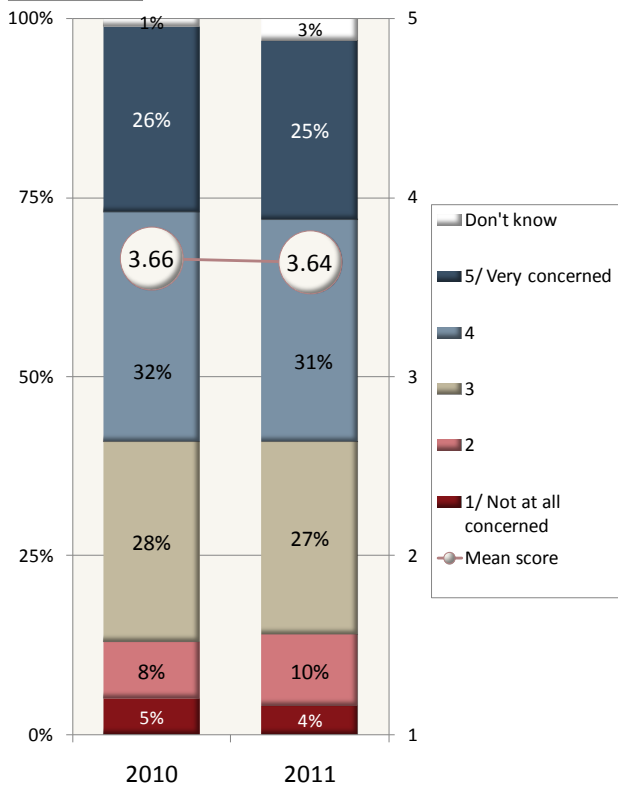


More likely to say "very concerned" (overall: 25%)  
 ✓ Household income of \$40,000-\$59,999: 33%

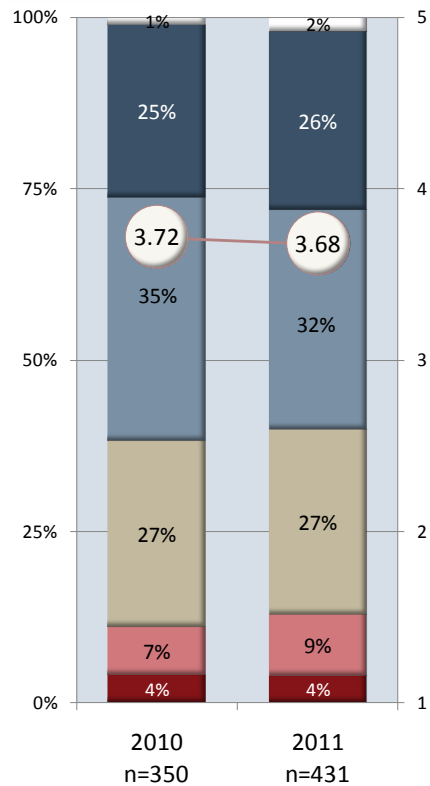


## 115. How concerned do you think **Questar Gas** is about helping customers save money through saving energy?

### Total Data



### Participants



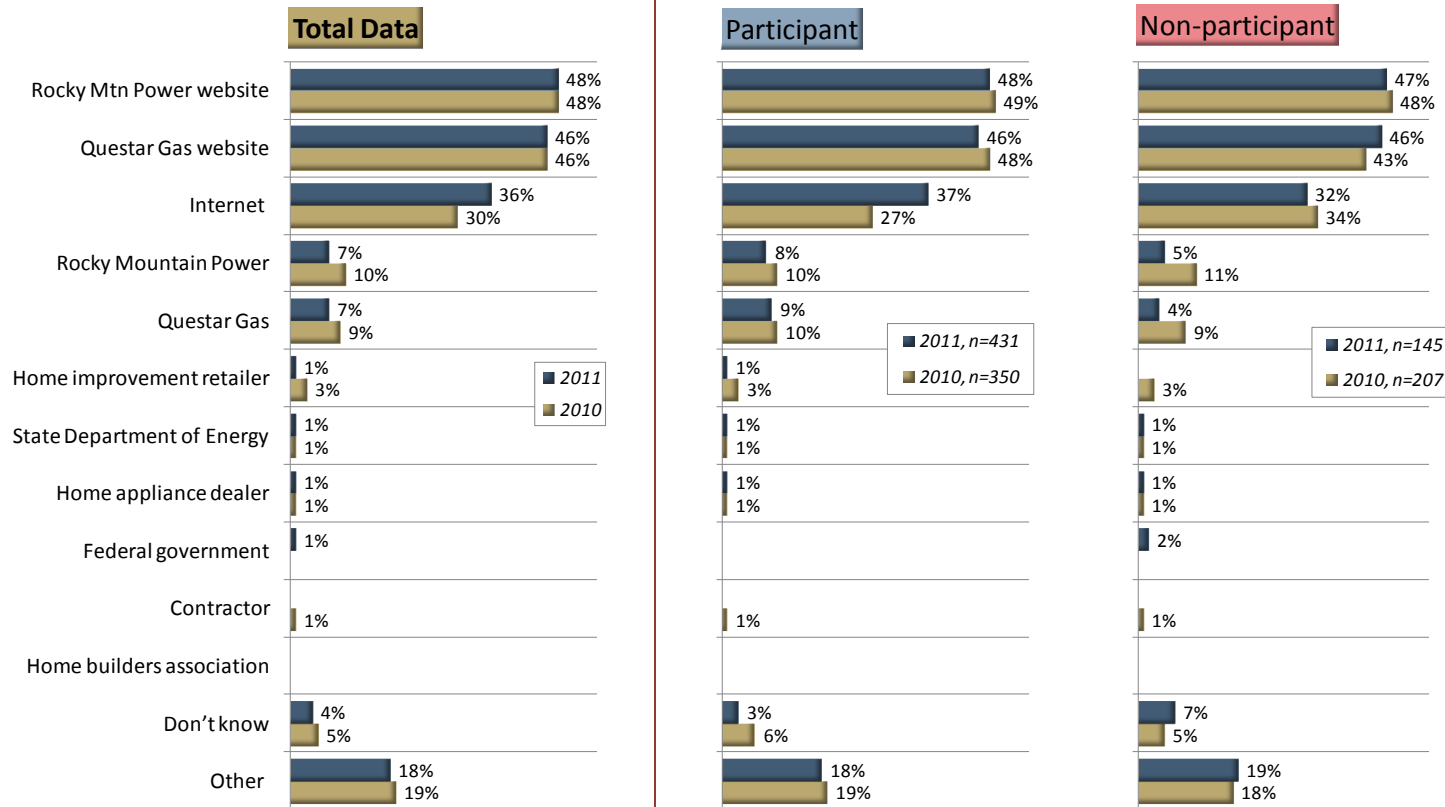
### Non-participants



More likely to say "very concerned" (overall: 25%)  
 ✓ Older residents (likelihood increases as age increases)



116-128. Now, if you wanted to know more about energy efficiency and home energy savings, rebates and/or products, where would you look for information?

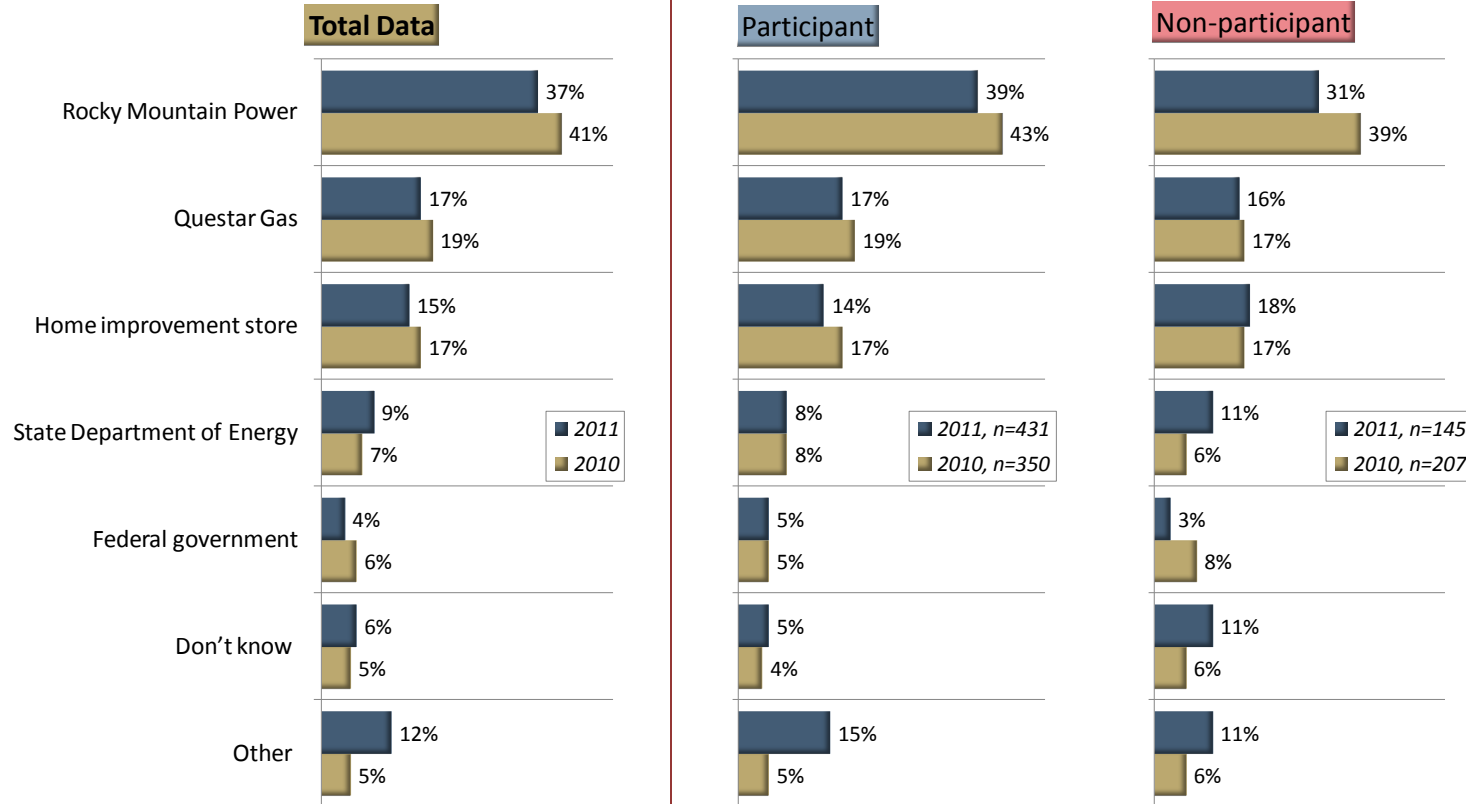


More likely to say **“Rocky Mountain Power website, Questar Gas website, or the Internet in general”**

(overall: 48%, 46%, and 36%, respectively)

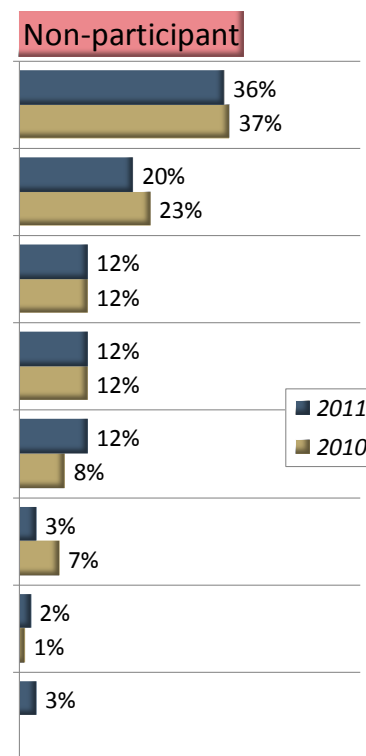
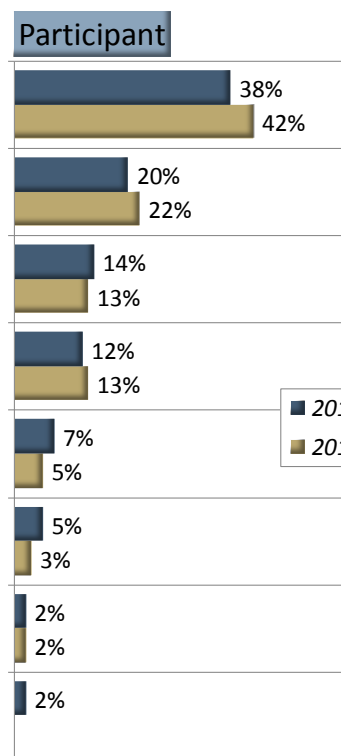
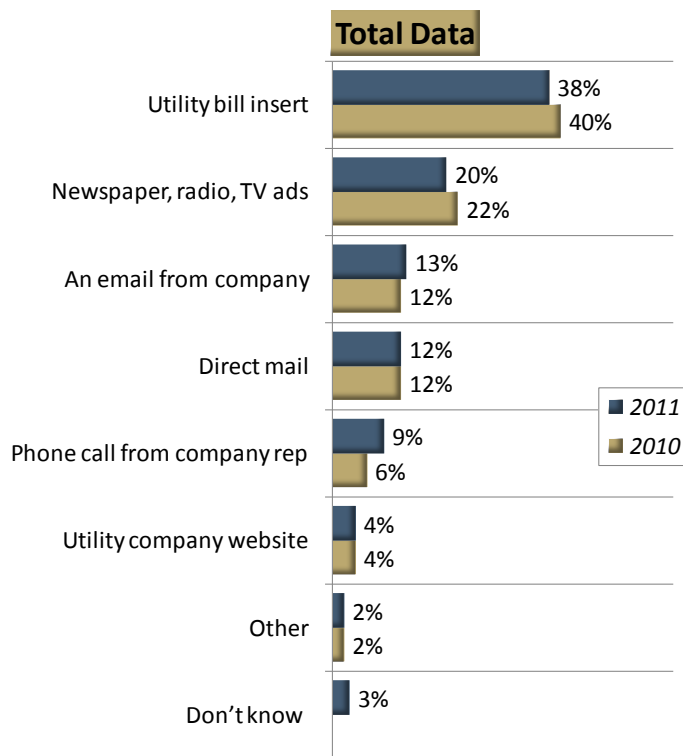
- ✓ Younger residents (likelihood increases as age decreases)
- ✓ Higher household income (likelihood increases as income increases)

129. Which one of the following would you most likely turn to first for energy-efficiency information?



More likely to say "Rocky Mountain Power" (overall: 37%)  
 ✓ Younger residents (likelihood increases as age decreases)  
 ✓ Davis County residents: 60%  
 ✓ Utah County residents: 47%  
 ✓ Salt Lake County residents: 47%

130. Which of the following do you think is the most effective way for your utility companies to communicate how to lower energy usage and save money on your utility bills?



More likely to say "utility bill insert" (overall: 38%)  
 ✓ Over age 64: 72%  
 ✓ Weber County residents: 54%  
 ✓ Non-Wasatch Front residents: 56%

More likely to "newspaper, radio, or TV ads" (overall: 20%)  
 ✓ Under age 35: 29%  
 ✓ Age 55-64: 31%  
 ✓ Davis County residents: 45%

More likely to say "email form the company" (overall: 13%)  
 ✓ Younger residents (likelihood increases as age decreases)





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# Thank you

**Dan Jones**  
**& ASSOCIATES**  
Public Opinion & Market Research