

Rocky Mountain Power

Utah Residential Energy Efficiency Survey

Conducted by

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& ASSOCIATES

Public Opinion & Market Research

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Table of Contents

<u>Slide</u>	<u>Topic</u>
--------------	--------------

3	Methodology
-----------	-------------

6	Research Objectives
-----------	---------------------

7	Key Findings
-----------	--------------

12 . . .	Recommendations
----------	-----------------

14 . . .	Study Results with Statistical Findings
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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 19 – August 16, 2010
- ▶ *How many?* 557 Rocky Mountain Power Customers
 - ▶ 350 Participants subset
 - ▶ 207 Non-participants subset
 - ▶ Only RMP customers are included in this analysis
- ▶ *Margin of error:* $\pm 4.2\%$ Rocky Mountain Power Customers
 - ▶ $\pm 5.3\%$ Participants subset
 - ▶ $\pm 6.9\%$ Non-participants subset

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 2010 findings to results from a similar study conducted in 2007

Key Findings

- ▶ Three out of five customers (59%) say it is *very important* for utility companies to offer energy conservation programs
- ▶ Customers say it is *very important* for residents to do the following:
 - ▶ Adjust the thermostat up in the summer, down in the winter (66%)
 - ▶ Use energy-efficient light bulbs (60%)
 - ▶ Unplug appliances when away from home (35%)
- ▶ Three quarters (73%) say they *have made changes* in their households in the past year to conserve energy. Top five actions (unaided) during the past year are:
 - ▶ Add insulation to attic, roof, or walls (30%)
 - ▶ Install energy-efficient appliances (23%)
 - ▶ Use energy efficient light bulbs (20%)
 - ▶ Adjust thermostat (18%)
 - ▶ Install energy-efficient doors or windows (16%)
- ▶ *Saving money* (75%) is the top motivator for making changes; *Protecting the environment* (11%) is a distant second
- ▶ *Reducing the need for new energy infrastructure* (2%), *helping to avoid power interruptions* (1%), and *reducing global warming* (1%) are not top-of-mind motivators

Key Findings

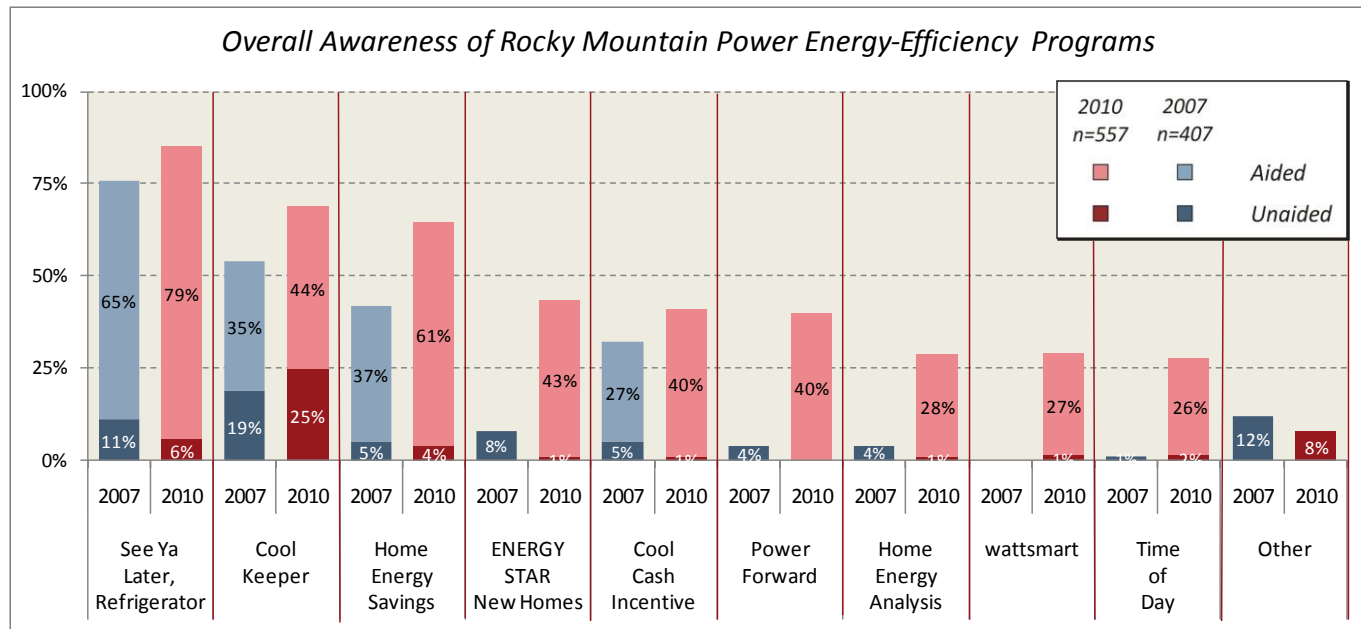
(Continued.)

- ▶ Top five energy-saving measures customers say they *already do/ have done*
 - ▶ Adjust thermostat (69%)
 - ▶ Do laundry only if there is a full load (68%)
 - ▶ Turn off lights when leaving a room (67%)
 - ▶ Use energy-saving light bulbs (59%)
 - ▶ Generally conserve or use less (57%)
- ▶ Top five measures customers say they are *very likely* to do in the next year
 - ▶ Turn off lights when leaving a room (27%)
 - ▶ Generally conserve or use less (23%)
 - ▶ Tune up your furnace or water heater (21%)
 - ▶ Use energy-saving light bulbs (17%)
 - ▶ Do laundry only if there is a full load (16%)
- ▶ Top five measures customers say they are *not at all likely* to do in the next year
 - ▶ Install an energy-efficient air conditioner or furnace (18%)
 - ▶ Install energy-efficient doors or windows (16%)
 - ▶ Unplug appliances when away from home (15%)
 - ▶ Add insulation to your attic, roof, or walls (15%)
 - ▶ Insulate water heater, pipes, or air ducts (14%)

Key Findings

(Continued.)

- ▶ Total awareness (unaided and aided responses) of the *Home Energy Savings* program has increased from 42% in 2007 to 64% in 2010 (+22 points)
- ▶ Total awareness of *Cool Keeper* is up 15 points (2007: 54% and 2010: 69%)
- ▶ Total awareness of the *See Ya Later, Refrigerator* and the *Cool Cash Incentive* programs have each increased 9 points

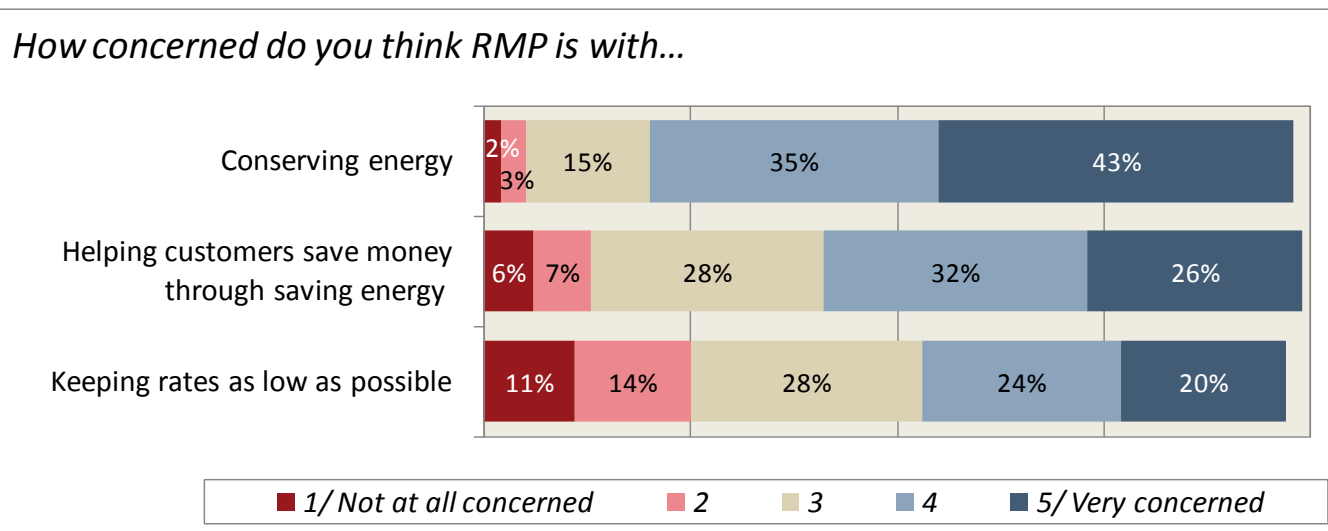


Note: 2007 aided responses were limited to the four programs mentioned in the bullets above.

Key Findings

(Continued.)

- ▶ *TV ads/ public service announcements (52%) and utility bill inserts (33%) are customers' top sources for hearing about energy-savings programs*
- ▶ There is moderate interest in a free online tool that would allow customers to do their own home energy assessment: 46% say they are somewhat or very interested (ratings of 4 or 5 on a 5-point scale); 30% indicate they are not interested (ratings of 1 or 2)
- ▶ Customers perceive that Rocky Mountain Power is more concerned about *conserving energy* than they are about *keeping rates as low as possible*



Key Findings

(Continued.)

- ▶ *Rocky Mountain Power's website (48%), Questar Gas's website (46%), and the Internet (30%) in general are top sources named, unaided, as places customers would look for energy-efficiency information*
- ▶ *Rocky Mountain Power (41%) is the source they say they would turn to first for energy-efficiency information, followed by Questar Gas (19%) and a home improvement retailer (17%)*
- ▶ *Customers say that utility bill inserts (40%) and newspaper, radio, and TV ads (22%) are the most effective ways for utility companies to communicate energy savings information*

Recommendations

Three-quarters of customers (75%) say *saving money* is the biggest motivator for participating in energy-saving programs, while one-quarter or less feel that Rocky Mountain Power is very concerned about *keeping rates as low as possible* (20%) or *helping customers save money through saving energy* (26%).

- ▶ Emphasize money saving aspects of participation in program materials and ads.

Rocky Mountain Power (41%) is named by more people than any other source as where they would turn to first for energy-efficiency information.

- ▶ Capitalize on Rocky Mountain's reputation in energy-savings programs.

Recommendations

(Continued.)

Customers identify *TV ads and public service announcements* (52%) and *utility bill inserts* (33%) as the top sources for having heard about energy-savings programs.

Likewise, *utility bill inserts* (40%) and *newspaper, radio, and TV ads* (22%) are revealed to be the most effective ways to communicate energy savings information to customers.

- ▶ Promote Rocky Mountain Power's energy-savings programs through the media (TV, radio, and newspapers) and coordinate those efforts with utility bill inserts.

Study Results with statistical findings

Screening Questions

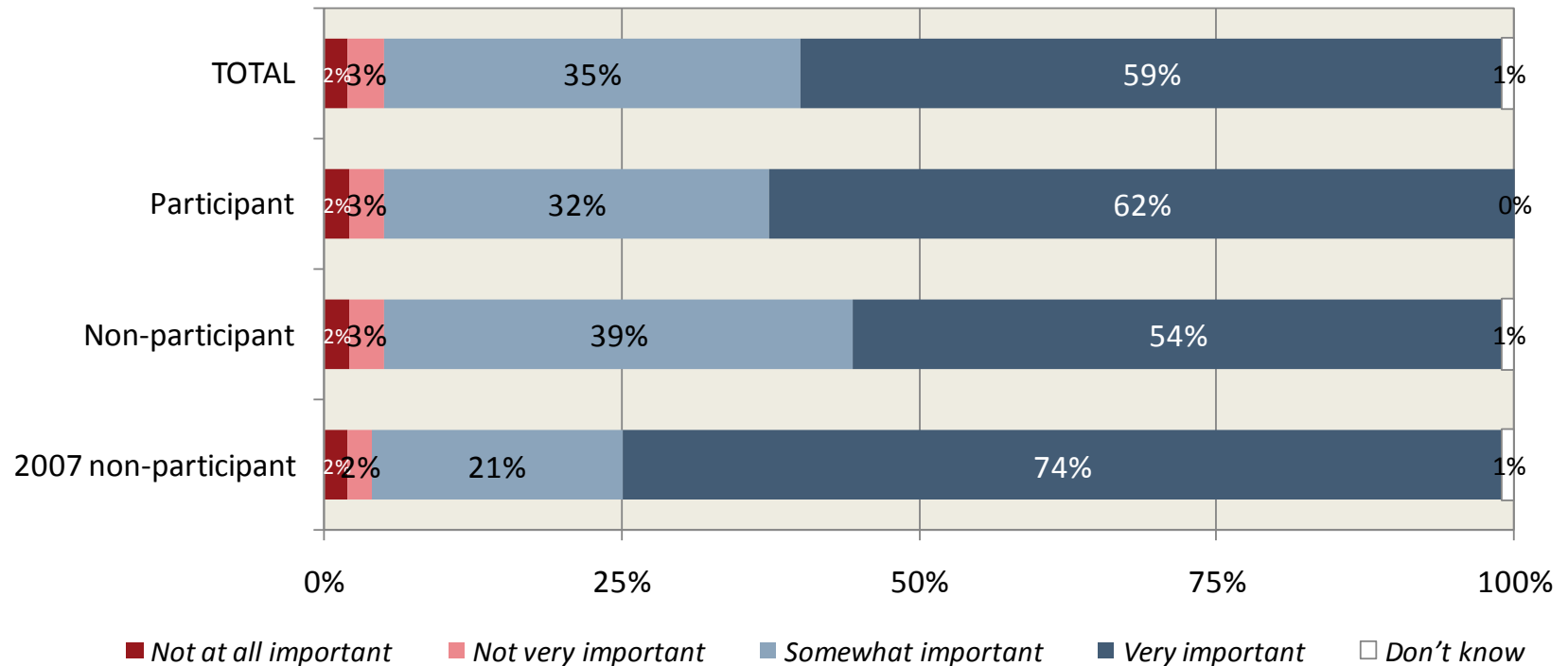
[Screener 1] Is Rocky Mountain Power your electricity provider?

	2007 <u>Non-participant</u>	2010 <u>Non-participant</u>	2010 <u>Participant</u>	2010 <u>TOTAL</u>
Yes	100%	100%	100%	100%

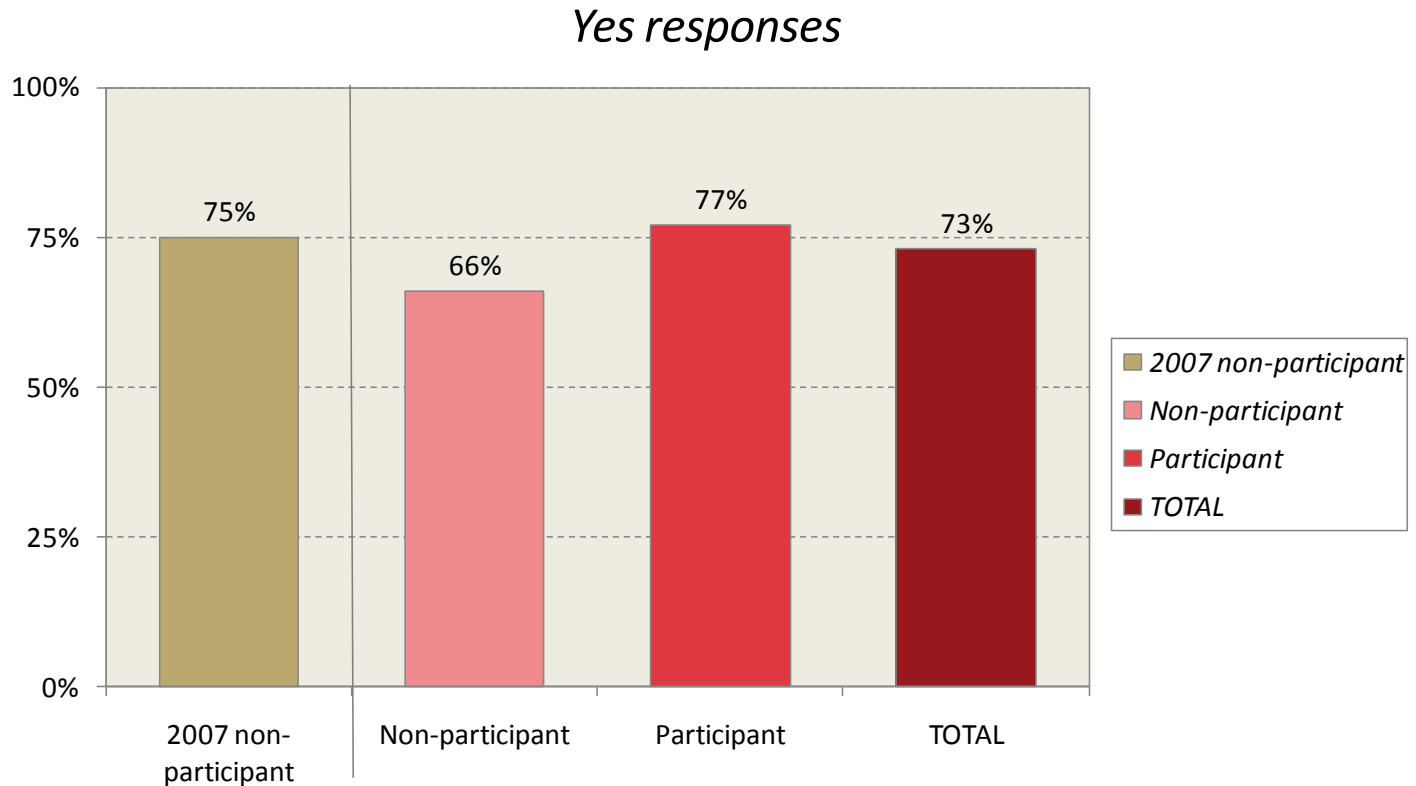
[Screener 2] Are you a person in your household who is likely to contact your utility company about its services?

	2007 <u>Non-participant</u>	2010 <u>Non-participant</u>	2010 <u>Participant</u>	2010 <u>TOTAL</u>
Yes	100%	100%	100%	100%

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



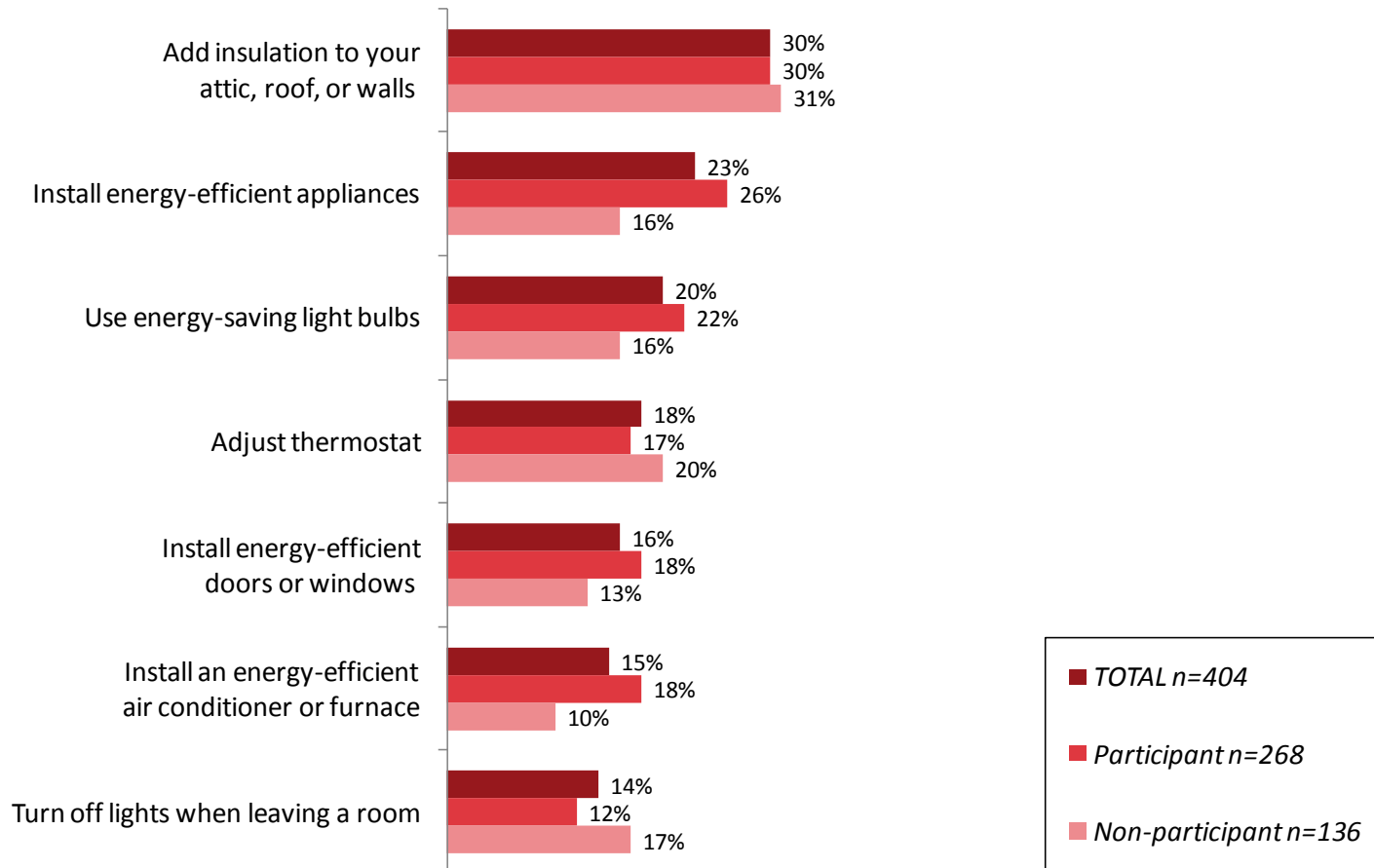
In the past year, have you taken any actions or changed anything in your household to save energy?



✓ *Program participants are more likely to say they have taken actions in the past year to save household energy.*

IF YES ON Q.5: What actions have you taken in your home in order to save energy? (UNAIDED. PERCENT MENTIONED)

Top responses

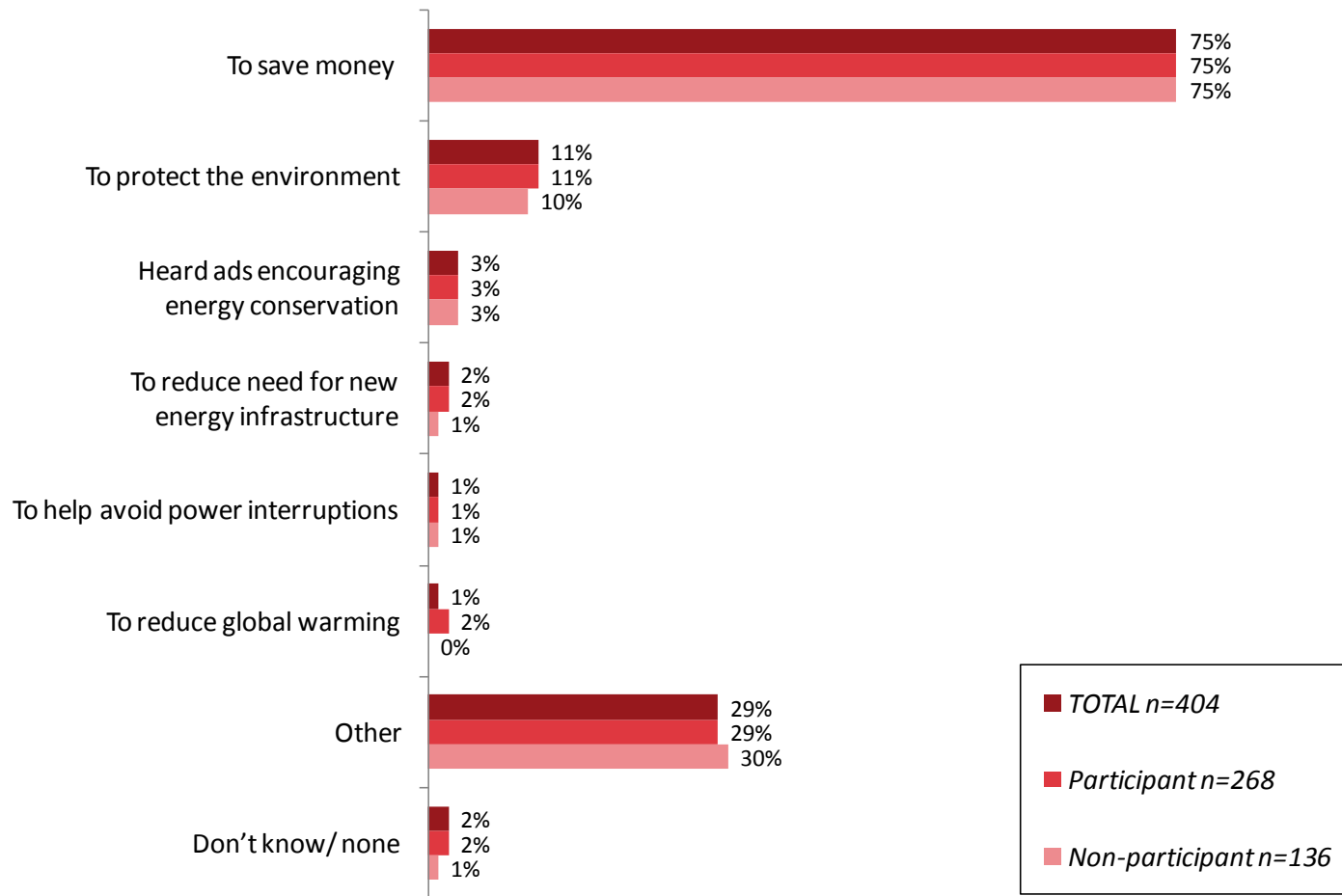


(Continued.) IF YES ON Q.5: What actions have you taken in your home in order to save energy?

Differences by customer segment

- ✓ *Program participants are more likely to say they **installed energy-efficient appliances.***
- ✓ *Customers with a rooftop evaporative cooler and residents under age 55 are more likely to say they **use energy-saving light bulbs.***
- ✓ *Customers with central air conditioning are more likely to mention **adjusting their thermostats.***
- ✓ *Customers with a rooftop evaporative cooler and Weber County residents are more likely to say they **installed energy-efficient doors or windows.***
- ✓ *Females, customers age 45 to 54, program participants, and Salt Lake County residents are more likely to say they **installed an energy-efficient air conditioner or furnace.***

IF YES ON Q.5: What are the main reasons you took steps to conserve energy in your home? (UNAIDED. PERCENT MENTIONED)



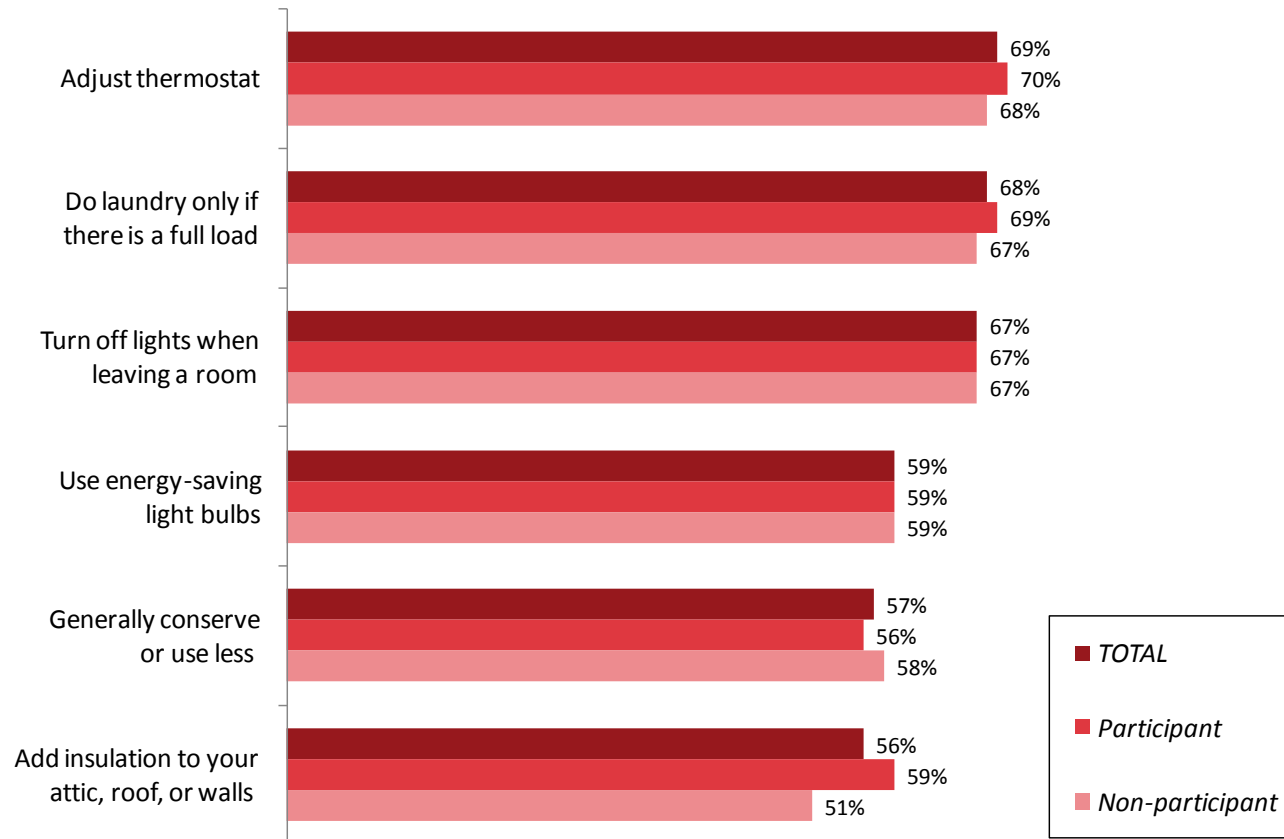
(Continued.) IF YES ON Q.5: What are the main reasons you took steps to conserve energy in your home?

Differences by customer segment

- ✓ *Younger customers (likelihood increases as age decreases) and those with lower annual household income (likelihood increases as income level decreases) are more likely to say the main reason they conserved energy was to **save money**.*
- ✓ *As age increases so does the likelihood of mentioning some **other** reason they have conserved energy in the past year.*

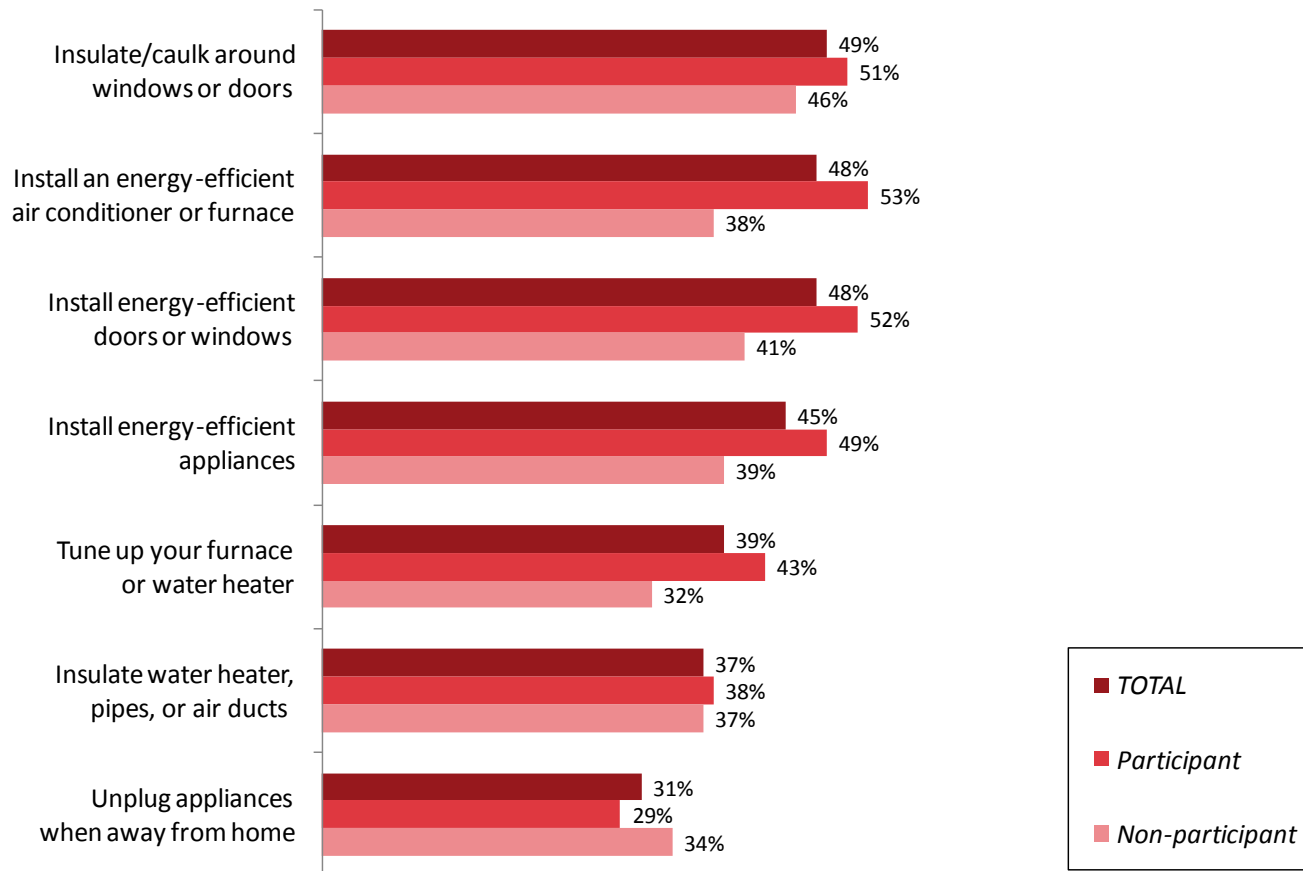
Think about energy-saving measures. For each, please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you already, please let me know.

"Already do" responses



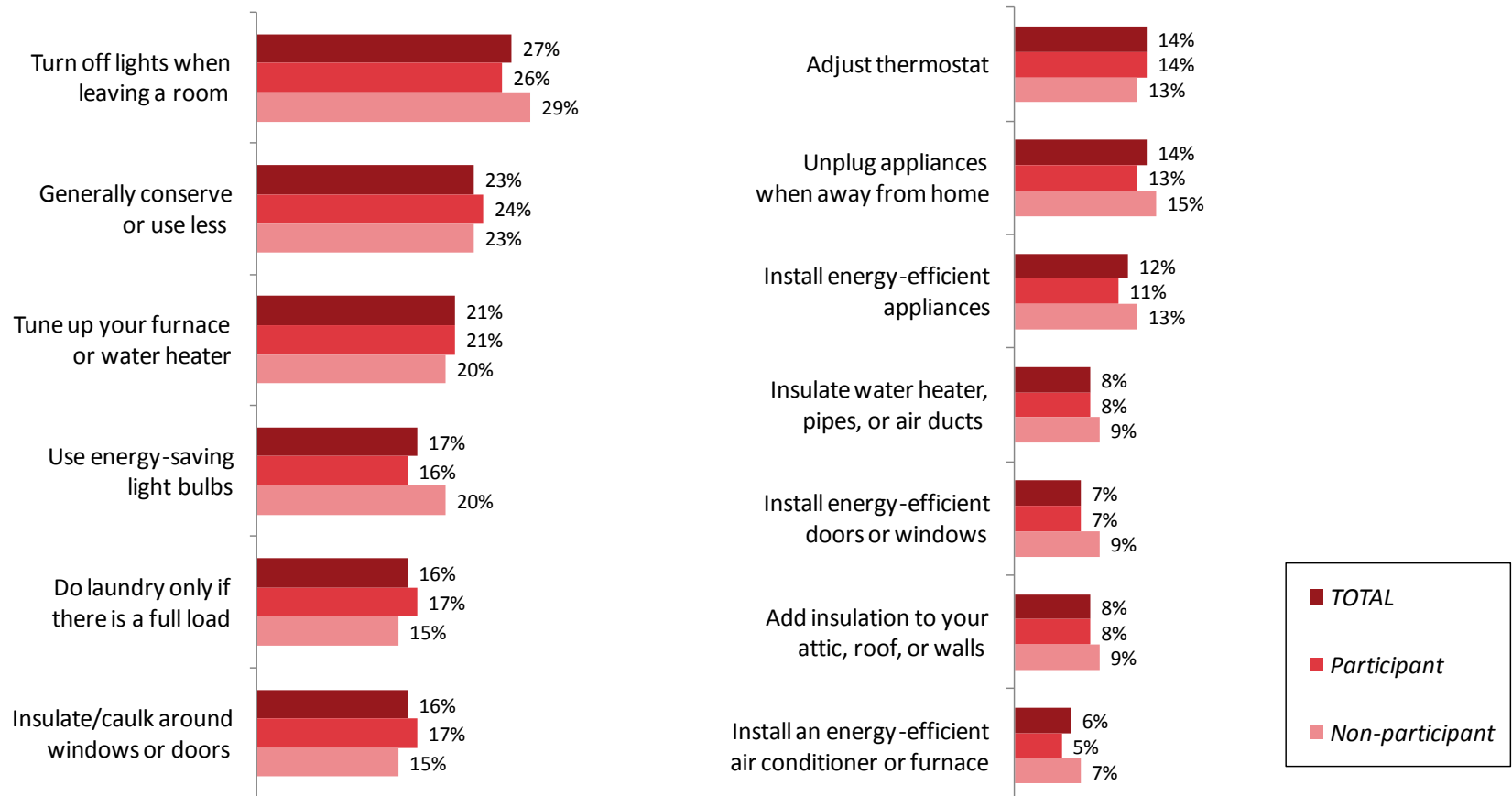
(Continued) ... please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you already do, please let me know.

"Already do" responses (continued)



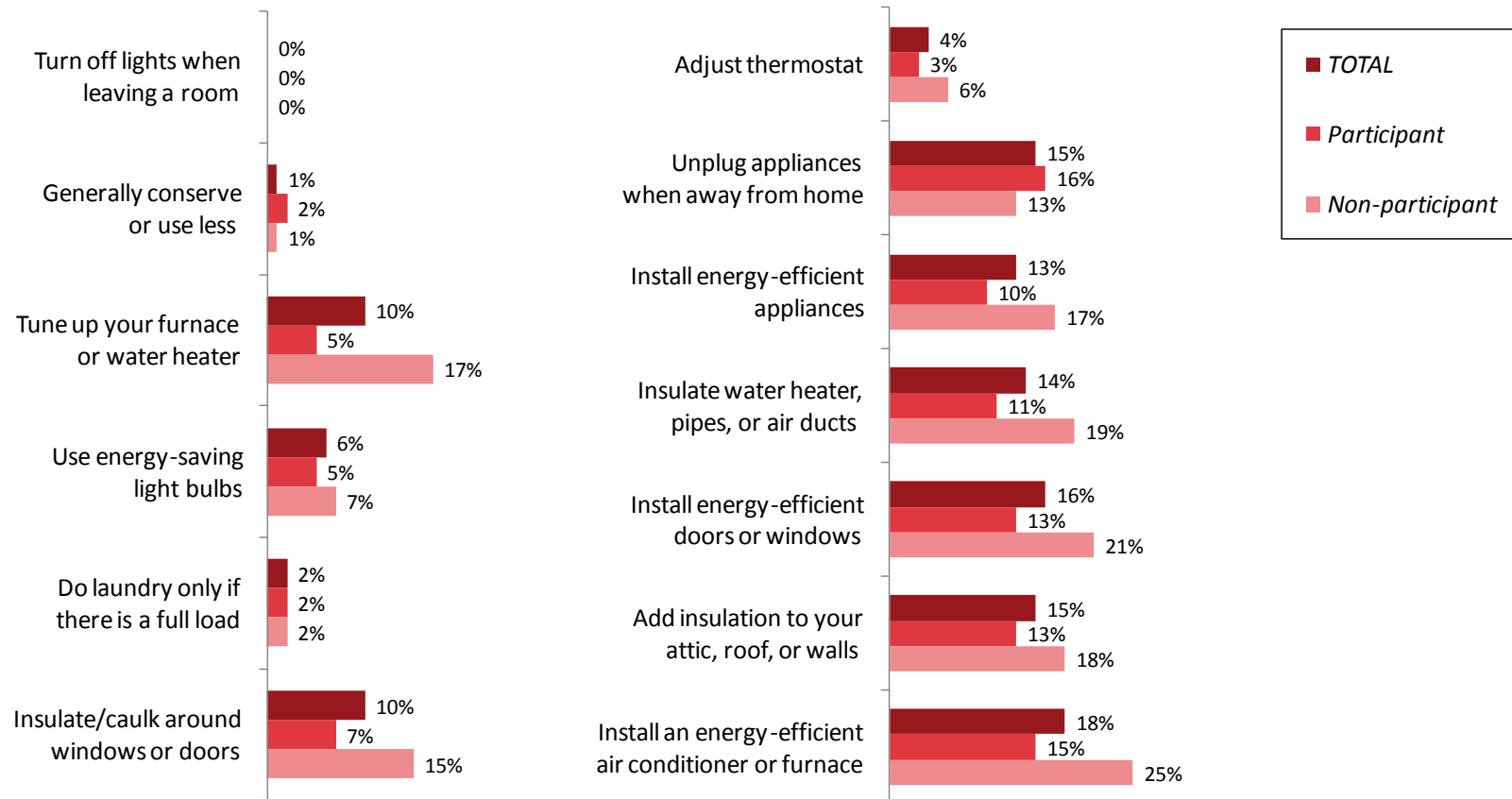
(Continued) ... please tell me if your household is *not at all likely*, *not very likely*, *somewhat likely*, or *very likely* to do it in the next year. If it is something you already do, please let me know.

"Very likely" responses



(Continued) ... 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, please let me know.

"Not at all likely" responses



(Continued) ... 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, please let me know.

Differences by customer segment

- ✓ Customers with central air conditioning and program participants are more likely to say they have **already added insulation to their attic, roof or walls**. Customers who have not changed anything in their households are more likely to say they are not at all likely to add insulation in the next year.
- ✓ Wasatch Front customers are more likely to say they have **already adjusted their thermostats down in the winter and up in the summer**.
- ✓ Females are more likely to say they **already do laundry only if there is a full load**.
- ✓ Females and customers with lower annual household income are more likely to say they **already generally conserve or use less energy**. Residents who have already made energy-conservation changes in their homes are more likely to say they are very likely to generally conserve in the next year.
- ✓ Customers with central air conditioning, older customers (likelihood increases as age increases), and program participants are more likely to say they have **already installed an energy-efficient furnace or air conditioner**. Younger customers (likelihood increases as age decreases) and non-participants are more likely to say they are not at all likely to install an energy-efficient furnace or air conditioner in the next year.

(Continued) ... 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, please let me know.

Differences by customer segment

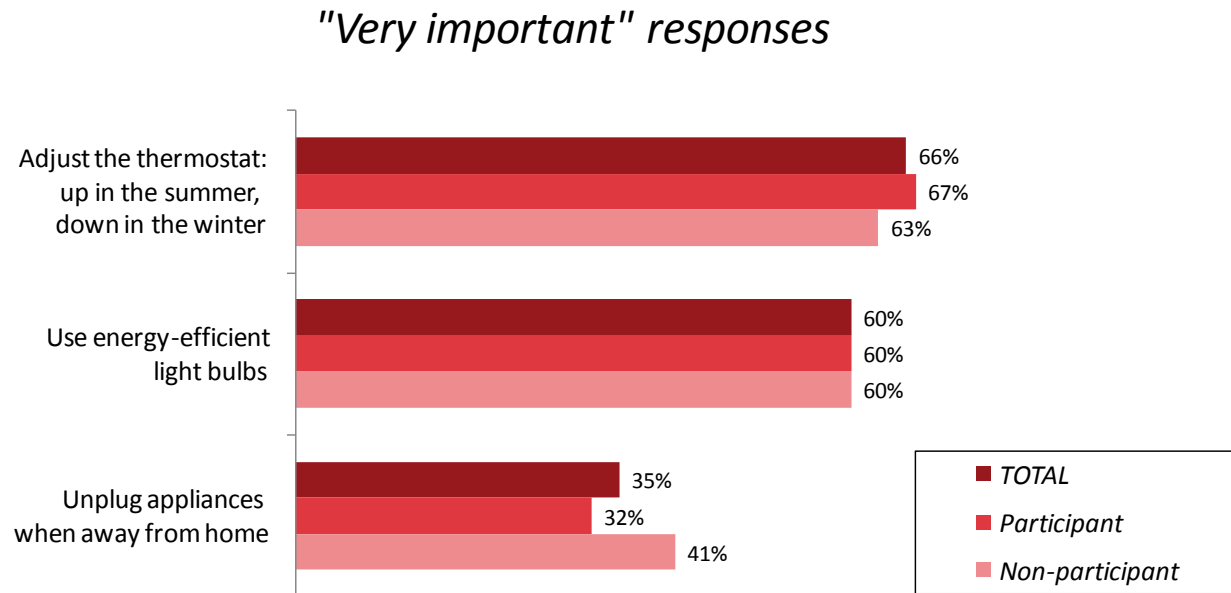
- ✓ Older customers (likelihood increases as age increases) and program participants are more likely to say they have **already installed energy-efficient appliances**.
- ✓ Older customers (likelihood increases as age increases) and program participants are more likely to say they have **already installed energy-efficient doors or windows**. Younger customers (likelihood increases as age decreases) and non-participants are more likely to say they are not at all likely to install energy-efficient doors or windows in the next year.
- ✓ Older customers (likelihood increases as age increases) are more likely to say they have **already insulated or caulked around their windows or doors**. Females are more likely to say they are somewhat or very likely to insulate or caulk around windows or doors in the next year.
- ✓ Females are more likely to say they are somewhat or very likely to **insulate their water heater, pipes, or air ducts in the next year**.
- ✓ Older customers (likelihood increases as age increases), participants, and Wasatch Front residents are more likely to say they have **already tuned up their furnace or water heater**. Younger customers (likelihood increase as age decreases) and residents who do not live along the Wasatch Front are more likely to say they are somewhat or very likely to tune up their furnace or water heater in the next year.

(Continued) ... 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, please let me know.

Differences by customer segment

- ✓ *Females, customers over age 54, and those with lower annual household income (likelihood increases as income decreases) are more likely to say they **already unplug appliances when away from home**. Males and older customers (likelihood increases as age increases) are more likely to say they are not at all likely to unplug appliances when away.*
- ✓ *Customers with higher annual household income (likelihood increases as income level increases) are more likely to say they **already use energy-saving light bulbs**. Customers with lower annual household income (likelihood increases as income level decreases) are more likely to say they are very likely to use energy-saving light bulbs in the next year.*

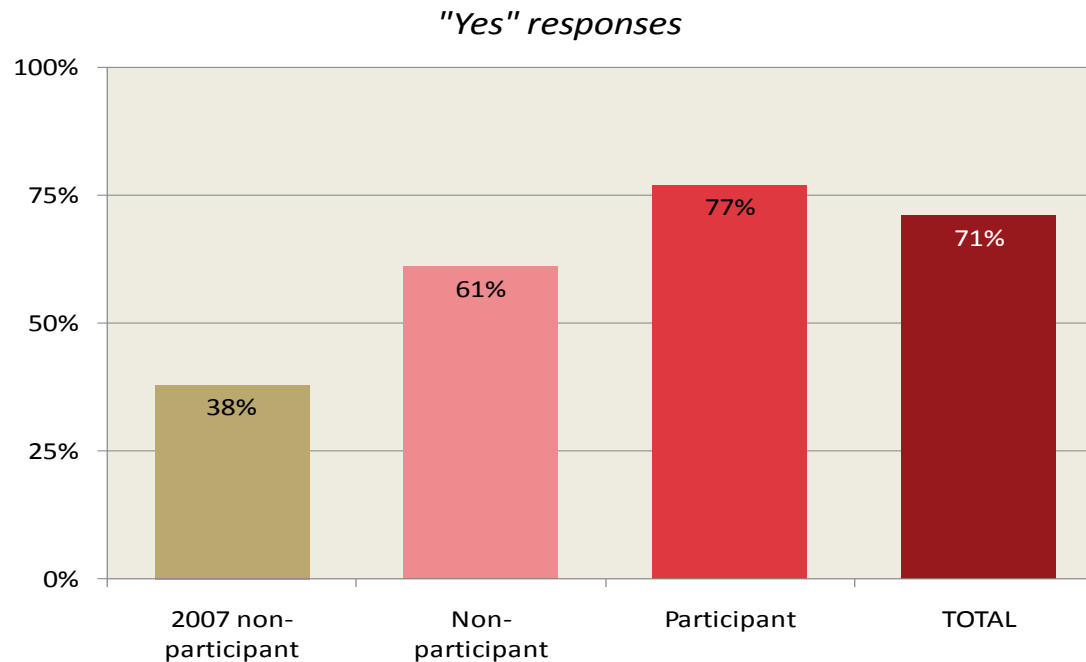
How important is it for residents to do the following?



- ✓ *Customers who have already made changes in their households to save energy are more likely to say it is very important to **use energy-efficient light bulbs**.*
- ✓ *Females, non-participants, and customers with lower annual household income (likelihood increases as income level decreases) are more likely to say it is very important to **unplug appliances when away**.*

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

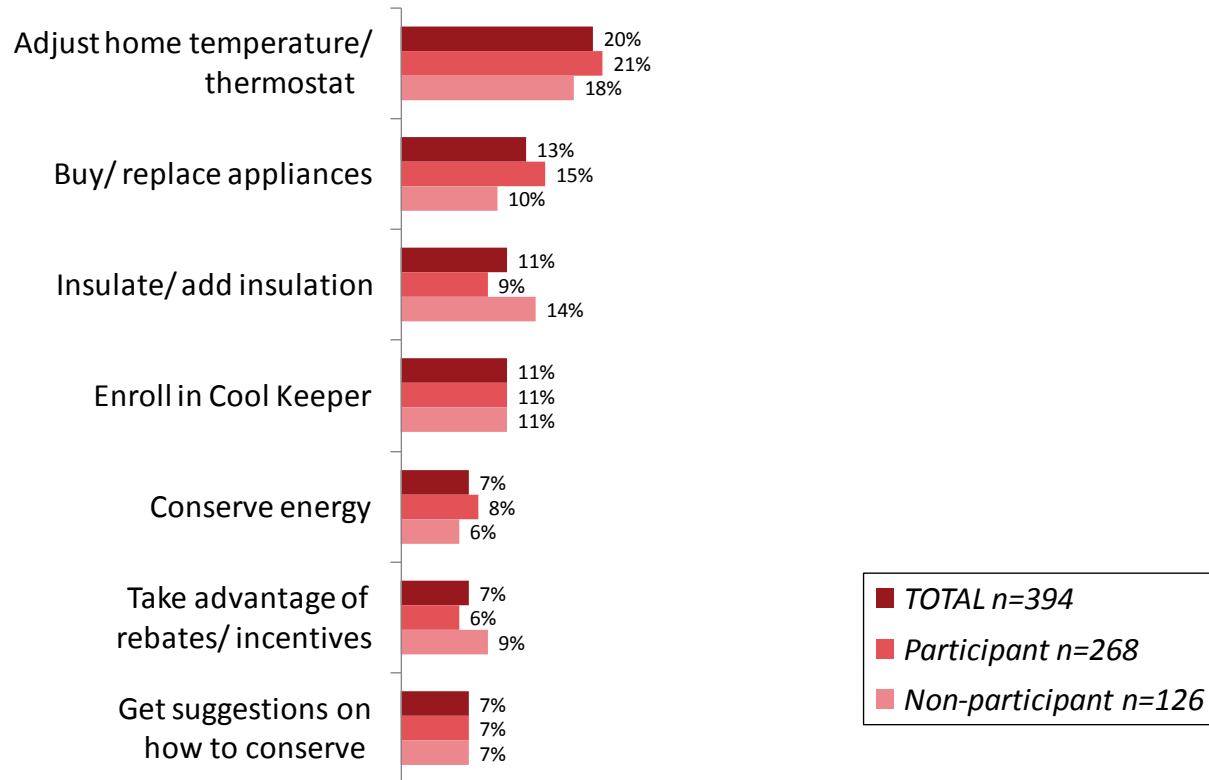
** The 2007 asked only if customers were aware not RMP programs—not both RMP and Questar programs.*



- ✓ *Customers age under age 35 or age 45 to 64, participants, those with higher annual household income (likelihood increases as income increases), and Wasatch Front residents are more likely to say they are aware of **programs to help them save energy or lower their utility bills**. Utah County and those who do not live along the Wasatch Front and customers who have not done anything in their household in the past year to save energy are more likely to say they are not aware of any programs to help them save energy or money.*

IF YES ON Q.45: From what you know or have heard, what is it that these programs ask people to do? (UNAIDED)

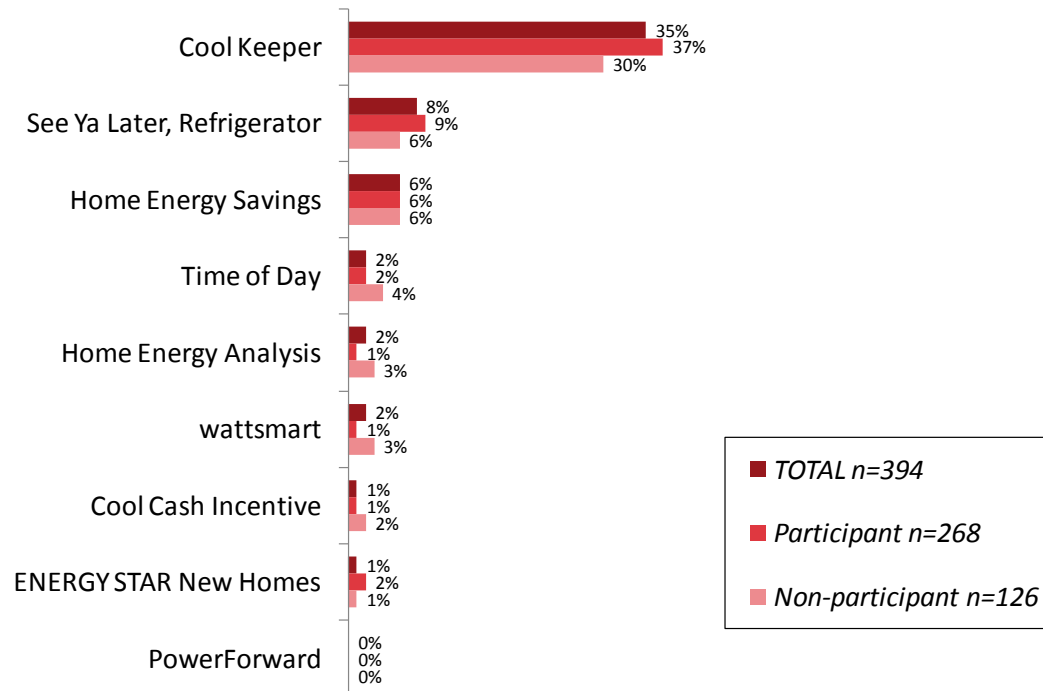
Rocky Mountain Power – Top responses



IF YES ON Q.45: What energy efficiency or conservation programs are you aware of from Rocky Mountain Power or Questar Gas*? Please name as many as you can think of.
(UNAIDED)

** The 2007 asked only if customers were aware not RMP programs—not both RMP and Questar programs.*

Rocky Mountain Power – Top responses



- ✓ *Customers with central air conditioning, those with higher annual household income (likelihood increases as income level increases), and residents of Salt Lake and Davis Counties are more likely to mention the **Cool Keeper** program.*

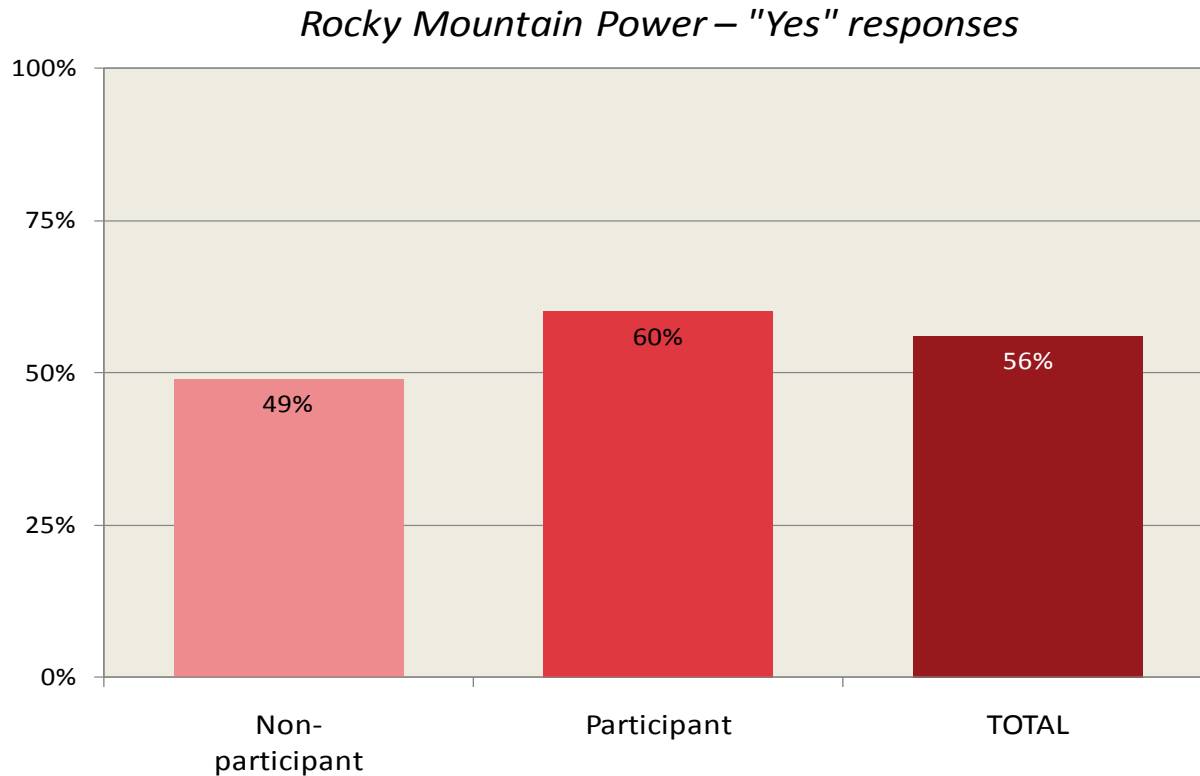
FOR EACH PROGRAM/ REBATE MENTIONED IN Q.47 – Q.59:
 From what you know or have heard, is Rocky Mountain Power
 or Questar Gas the sponsor of ... ?

			Rocky Mountain Power	Questar Gas	Other	Don't know
Cool Keeper						
	<u>Participant</u>	<i>n=100</i>	94%	2%	0%	4%
	<u>Non-participant</u>	<i>n=38</i>	97%	0%	3%	0%
See Ya Later, Refrigerator						
	<u>Participant</u>	<i>n=25</i>	92%	0%	0%	8%
	<u>Non-participant</u>	<i>n=7</i>	86%	0%	0%	14%
Home Energy Savings						
	<u>Participant</u>	<i>n=15</i>	53%	0%	27%	20%
	<u>Non-participant</u>	<i>n=7</i>	0%	0%	14%	86%
Time of Day						
	<u>Participant</u>	<i>n=4</i>	75%	0%	0%	25%
	<u>Non-participant</u>	<i>n=5</i>	20%	20%	0%	60%

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

			Rocky Mountain Power	Questar Gas	Other	Don't know
wattsmart						
	<u>Participant</u>	<i>n=3</i>	67%	0%	0%	33%
	<u>Non-participant</u>	<i>n=4</i>	100%	0%	0%	0%
Home Energy Analysis						
	<u>Participant</u>	<i>n=2</i>	100%	0%	0%	0%
	<u>Non-participant</u>	<i>n=4</i>	0%	25%	0%	75%
Cool Cash Incentive						
	<u>Participant</u>	<i>n=3</i>	67%	0%	0%	33%
	<u>Non-participant</u>	<i>n=2</i>	50%	0%	0%	50%

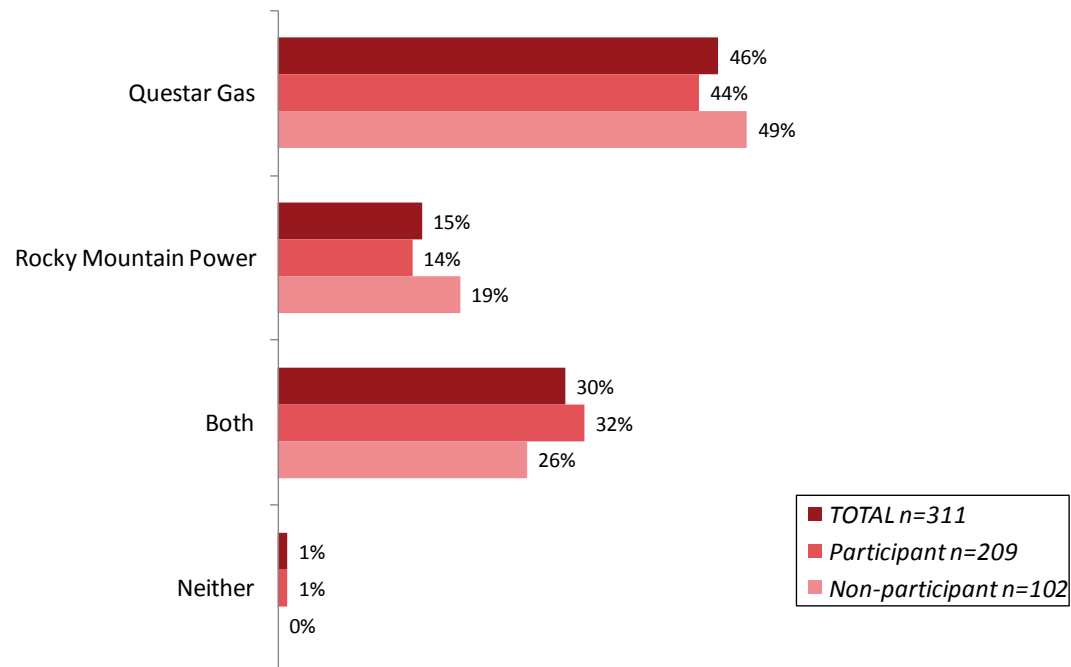
From what you know or have heard, do either Questar Gas or Rocky Mountain Power offer a service where an expert visits your home and assesses your energy efficiency?



- ✓ *Participants, customers who have already made changes in the past year to save energy, and residents of Salt Lake and Utah Counties are more likely to say they are aware of an **in-home energy-assessment program**.*

IF YES ON Q.75 : Who offers this in-home service?

Who sponsors the in-home service?

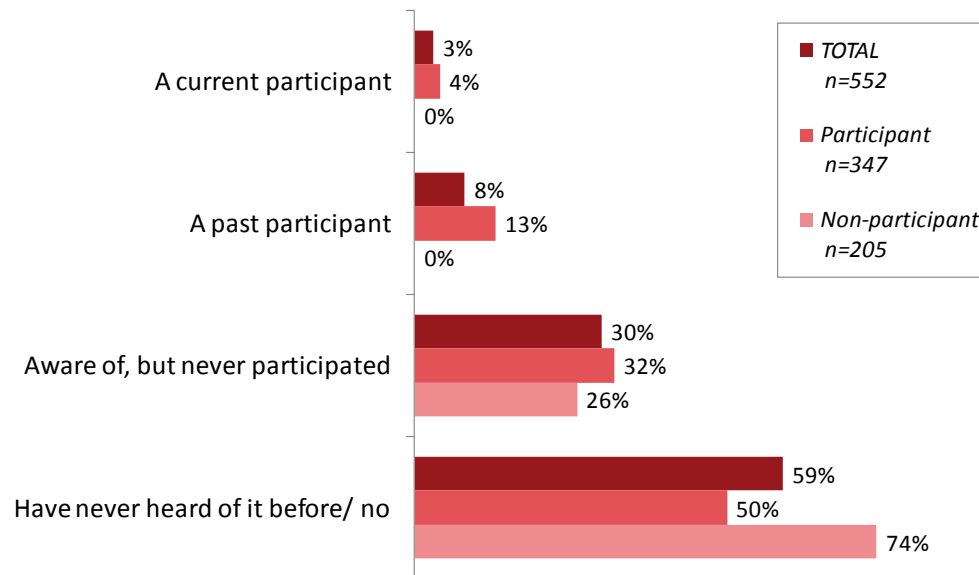


- ✓ *Salt Lake and Utah County residents are more likely to identify **Questar Gas** as the sponsor of the in-home service. There is a greater likelihood among residents of other counties to say they **don't know** who offers the in-home service.*

FOR EACH PROGRAM/ REBATE NOT ALREADY MENTIONED IN Q.47 – Q.59: Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.

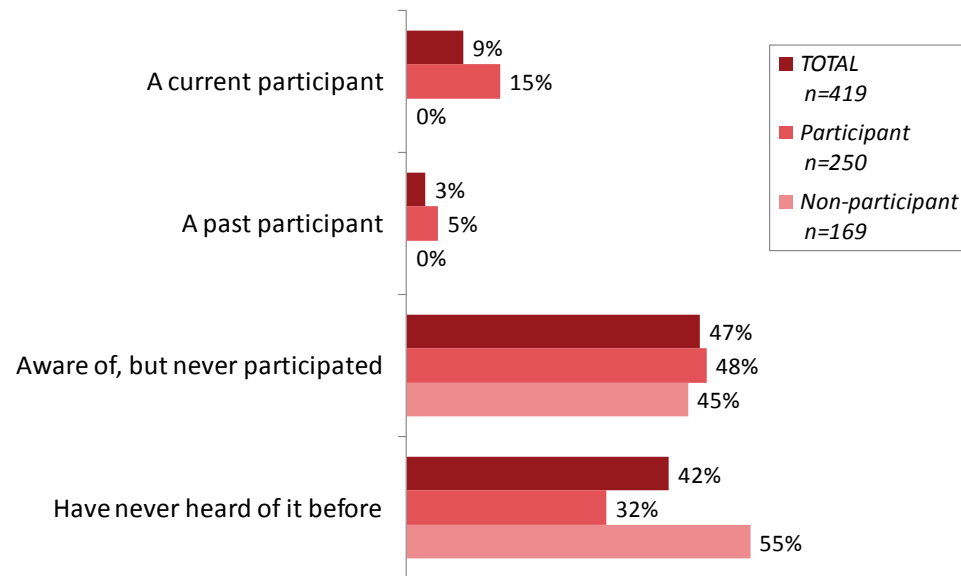


- ✓ *Customers with a rooftop swamp cooler, younger customers (likelihood increases as age decreases), non-participants, people with lower annual household income (likelihood increases as income level decreases), and those with an annual household income greater than \$130,000 are more likely to say they have never heard of the Cool Cash Incentive. Residents with a rooftop swamp cooler, those over age 64, Wasatch Front residents, and those with an annual household income of \$60,000 to \$129,999 are more likely to say they are aware of the program, but have never participated.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.

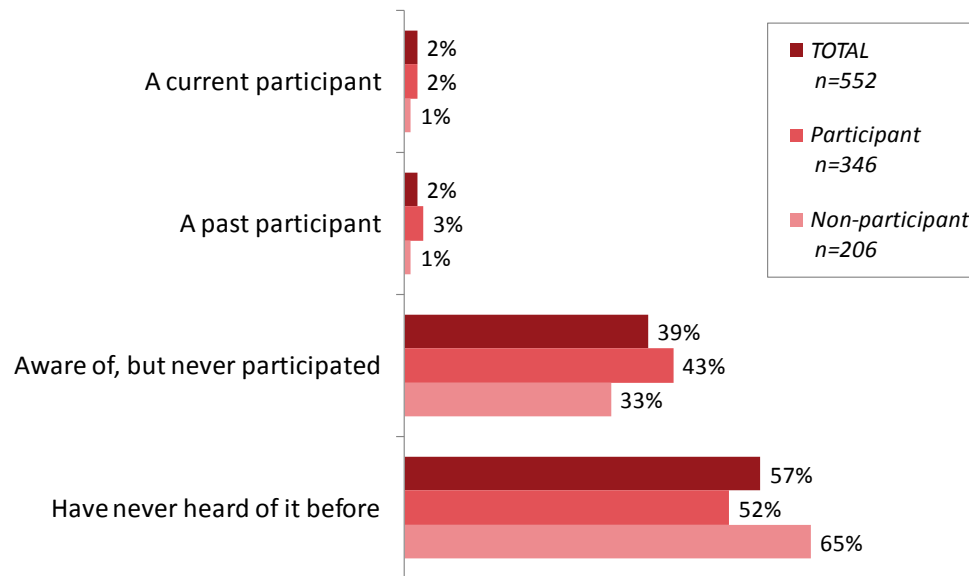


- ✓ *Customers with a rooftop swamp cooler, non-participants, customers with an annual household income less than \$40,000 or greater than \$130,000, and those who do not live along the Wasatch Front are more likely to say they have never heard of the Cool Keeper program. Wasatch Front residents are more likely to say they are current or past participants of the Cool Keeper program. Residents with a household income of \$40,000 to \$129,999 and residents of Salt Lake or Weber Counties are more likely to say they are aware of the program, but have never participated.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.

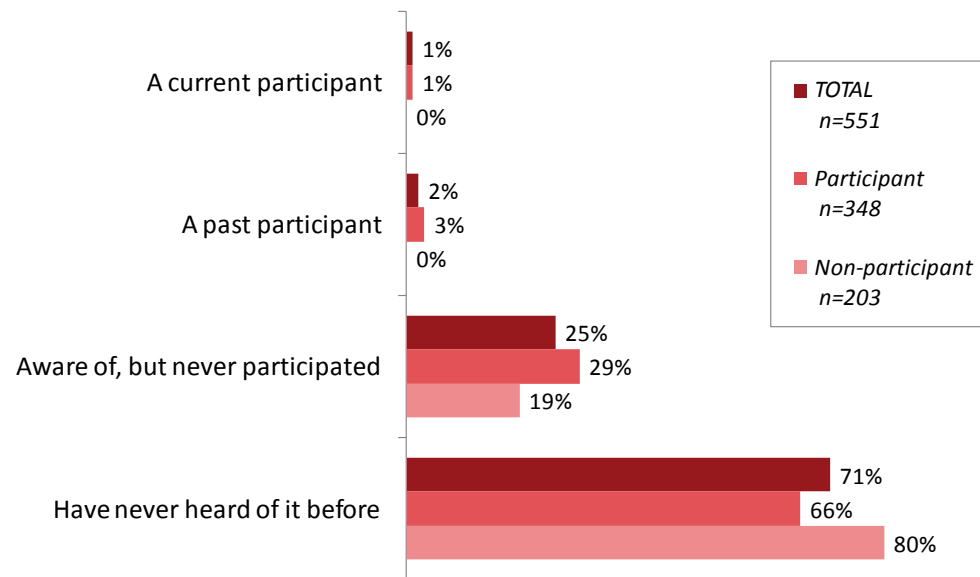


- ✓ *Customers with a rooftop swamp cooler, non-participants, and those who do not live along the Wasatch Front are more likely to say they have never heard of the ENERGY STAR New Homes program. Wasatch Front residents and participants are more likely to say they are aware of the program, but have never participated.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.

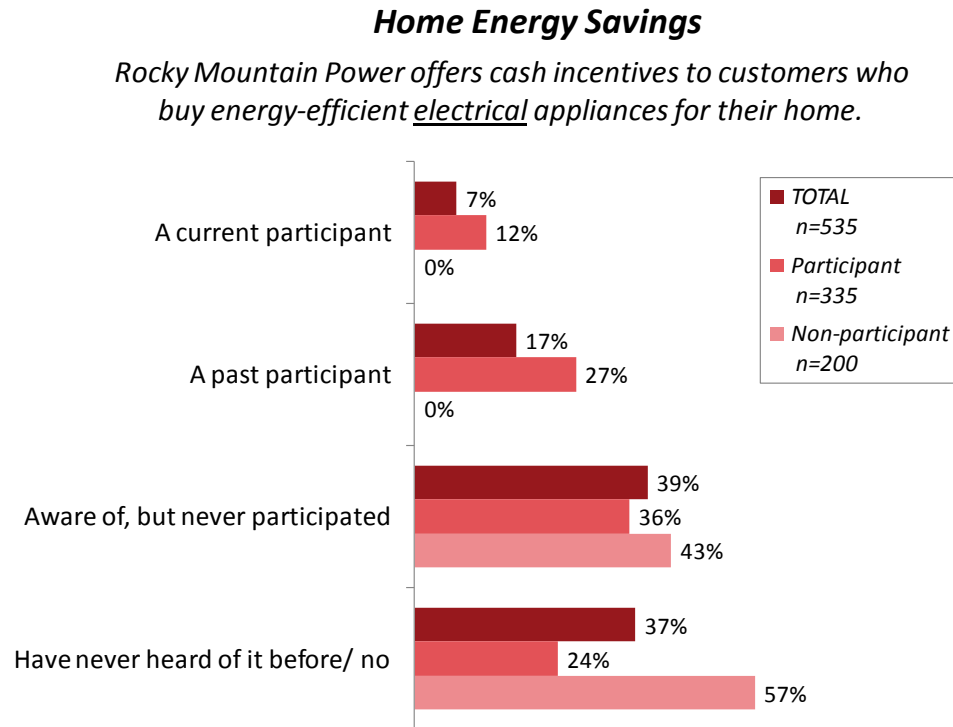
Home Energy Analysis

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



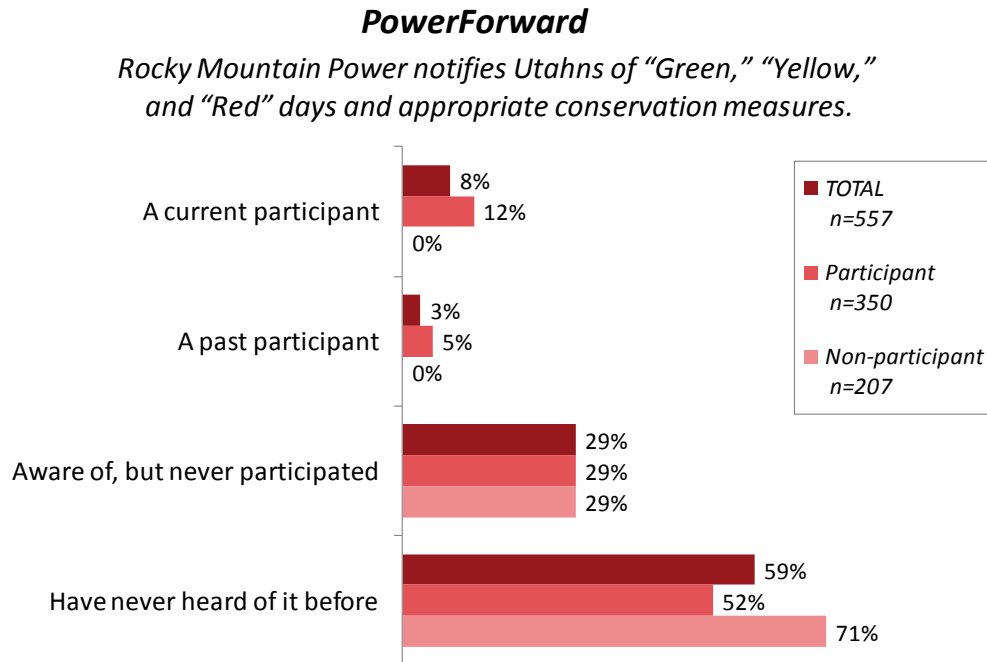
- ✓ *Non-participants and customers who do not live in Salt Lake County are more likely to say they have never heard of the Home Energy Analysis. Participants and Salt Lake County residents are more likely to say they are aware of the program, but have never participated.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.



- ✓ *Non-participants, Utah County residents, and those who do not live along the Wasatch Front are more likely to say they have never heard of the **Home Energy Savings** program. Wasatch Front residents—especially those in Salt Lake, Davis, and Weber Counties—are more likely to say they are a current or past participant of the program.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.

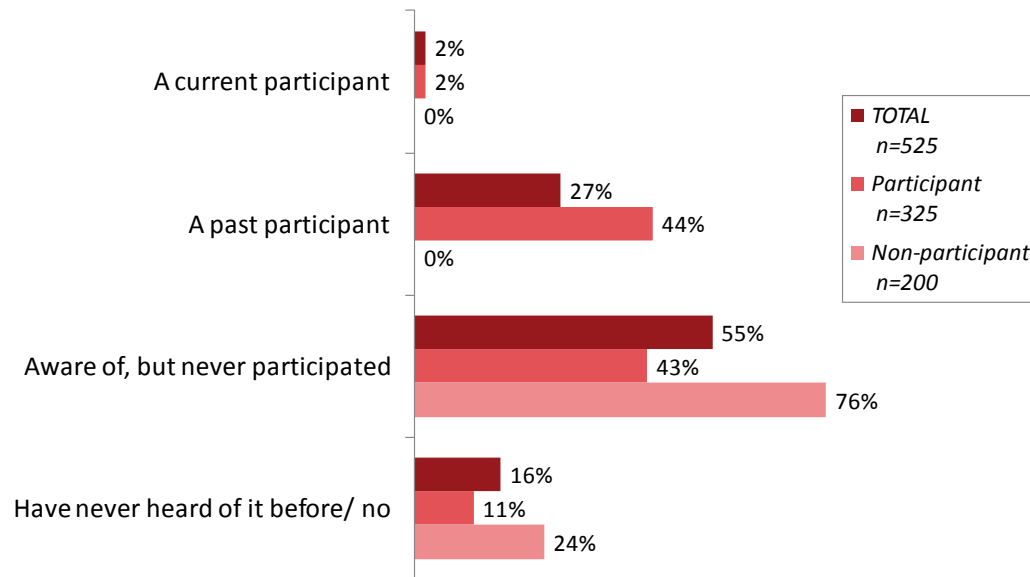


- ✓ *Customers who do not live along the Wasatch Front are more likely to say they have never heard of the **PowerForward** program. Davis County customers are more likely to say they are aware of the program, but have never participated. Salt Lake County customers are more likely to say they are a current or past participant of the PowerForward program.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.

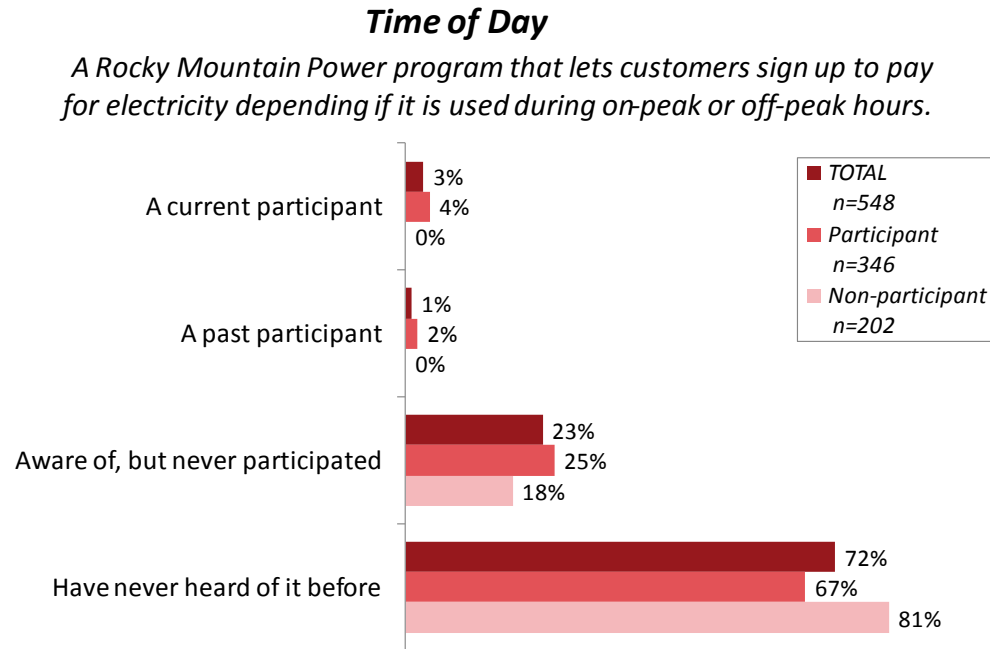
See Ya Later, Refrigerator

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



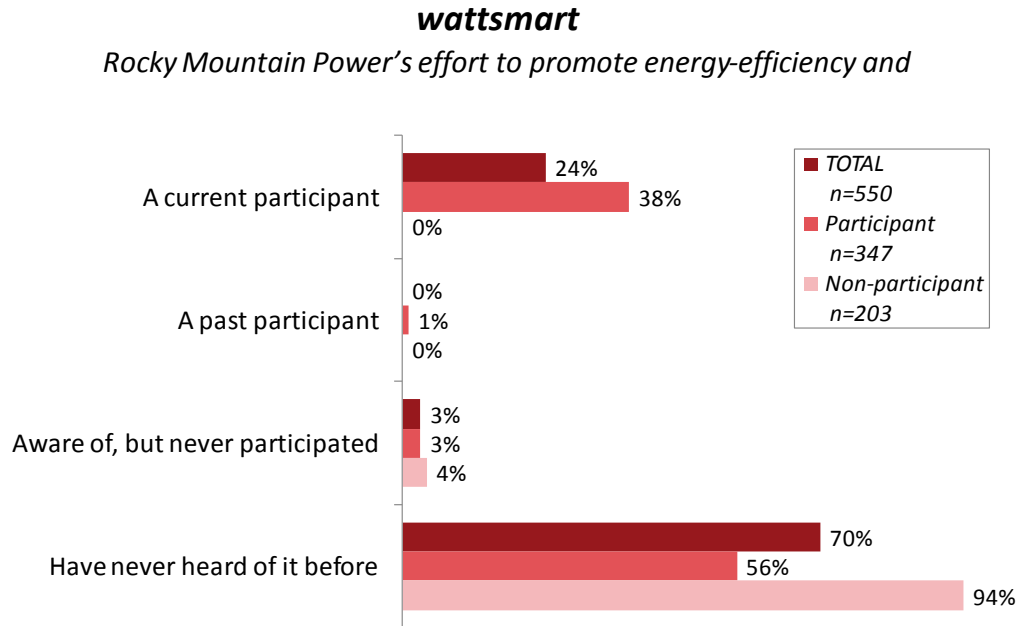
- ✓ *Customers with central air conditioning, non-participants, Utah County customers, and those who do not live along the Wasatch Front are more likely to say they have never heard of See Ya Later, Refrigerator. Non-participants, Davis County residents, and customers who do not live along the Wasatch Front are more likely to say they are aware of the program, but have never participated. Customers with a rooftop swamp cooler, Wasatch Front customers—especially those in Salt Lake and Weber Counties—are more likely to say they are current or past participants in the program.*

(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. 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.



- ✓ *Customers under age 55, non-participants, Utah County residents, and people who do not live along the Wasatch Front are more likely to say they have never heard of the Time of Day program. Participants, customers over age 55, and residents of Salt Lake, Davis, and Weber Counties are more likely to say they are aware of the program, but have never participated.*

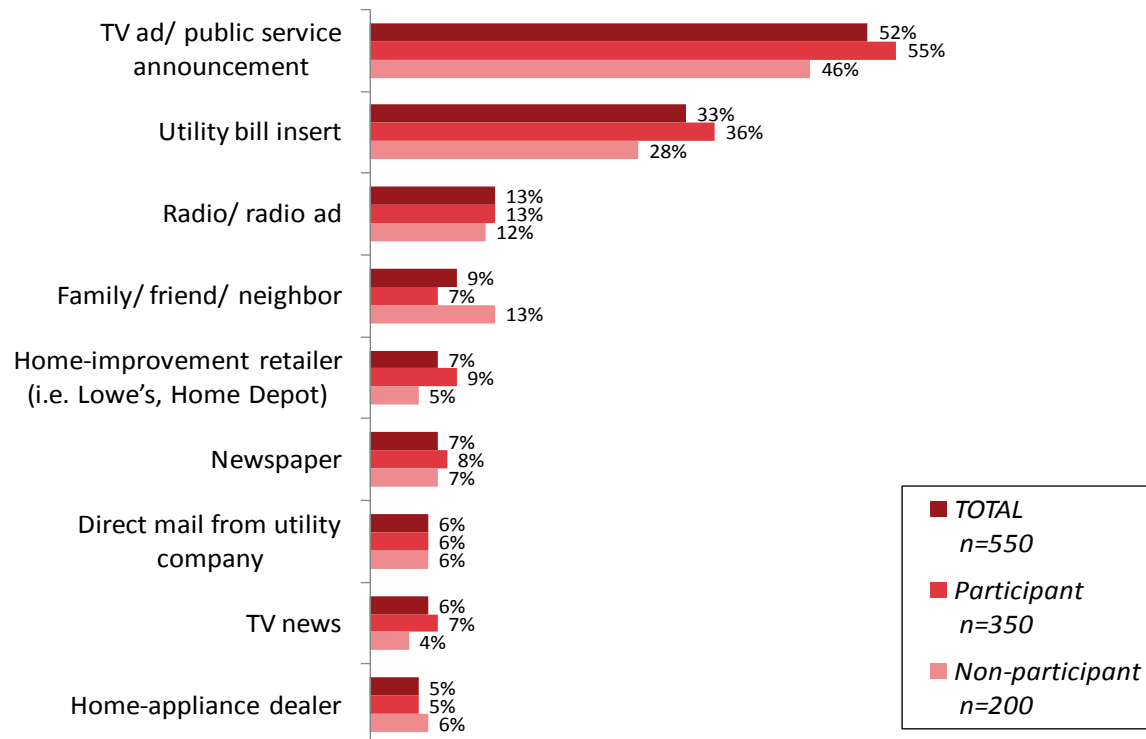
(Continued ...) Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.



✓ *Females, customers under age 45, and non-participants are more likely to say they have never heard of **wattsmart**. Males, participants, and customers age 45 to 64 are more likely to say they participate in the program.*

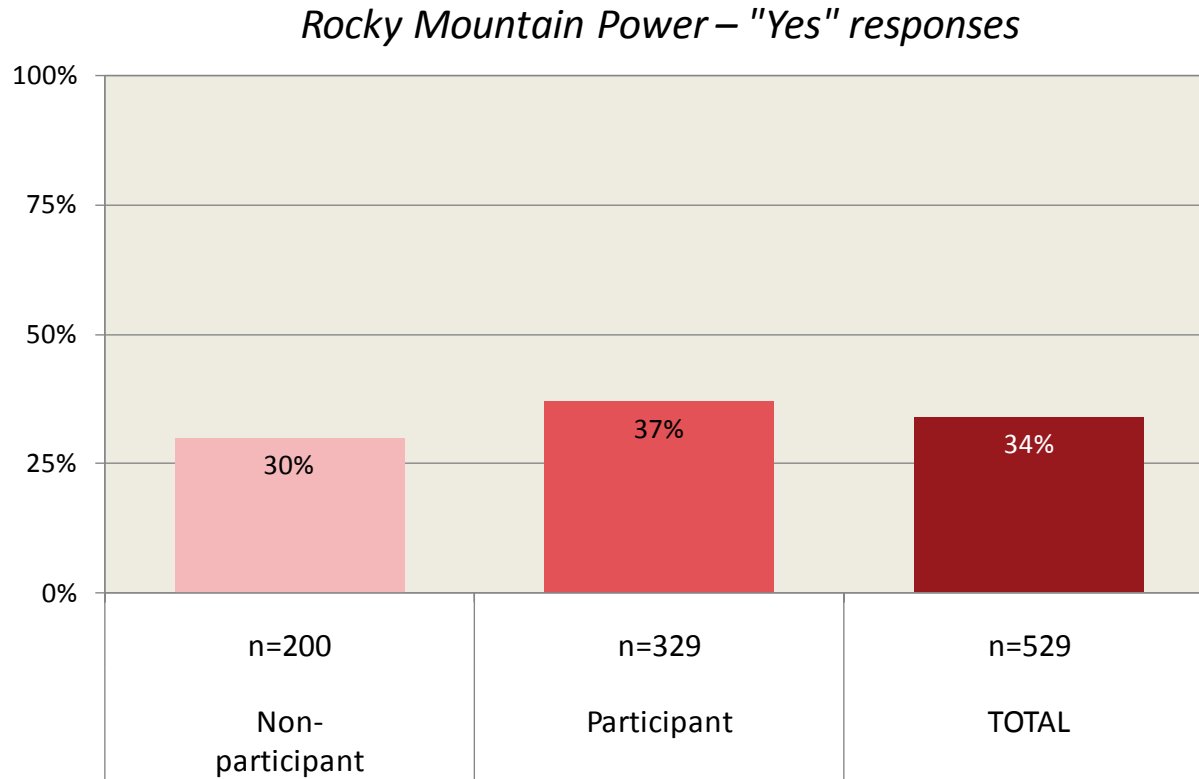
IF AWARE : Where did you first see or hear about these energy savings programs? (UNAIDED)

Rocky Mountain Power – Top responses



- ✓ Likelihood increases as age decreases that a customer will mention the **radio** as where they first heard about these energy savings programs.
- ✓ Participants and residents of Salt Lake and Weber Counties are more likely to mention **television** as where they first heard about the programs.

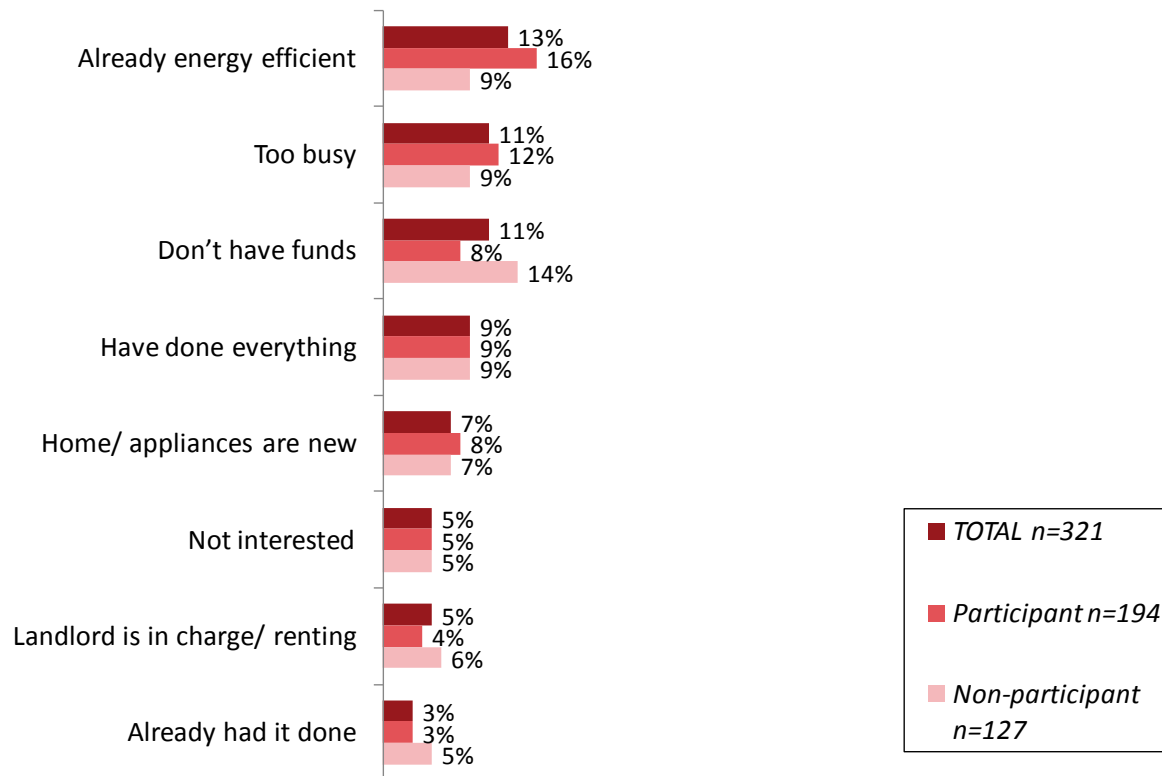
IF NEVER HEARD OF/ NOT PARTICIPATED ON Q. 82 'HOME ENERGY AUDIT':
Do you think you or someone in your household might request a home energy audit in the upcoming year?



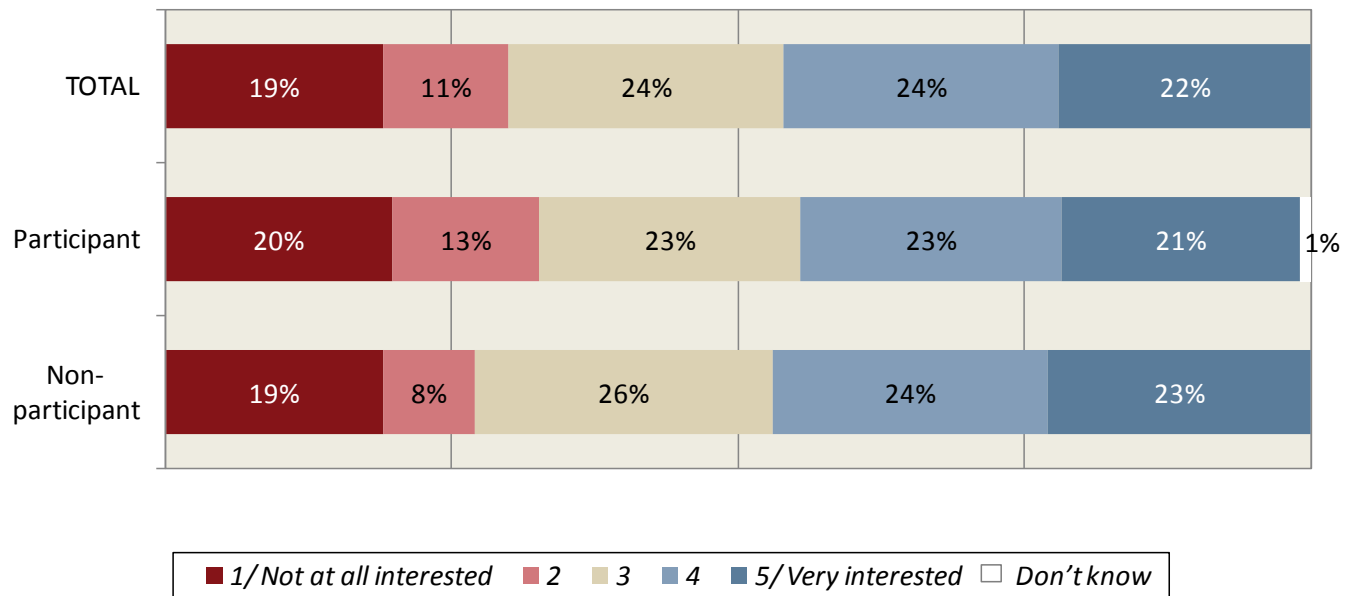
- ✓ *Females, customers who have already made energy conserving changes in their households, and younger customers (likelihood increases as age decreases) are more likely to say they might request a Home Energy Audit in the next year.*

IF NO ON Q.107: Why don't you think you would request a Home Energy Audit in the next year? (UNAIDED)

Rocky Mountain Power – Top responses

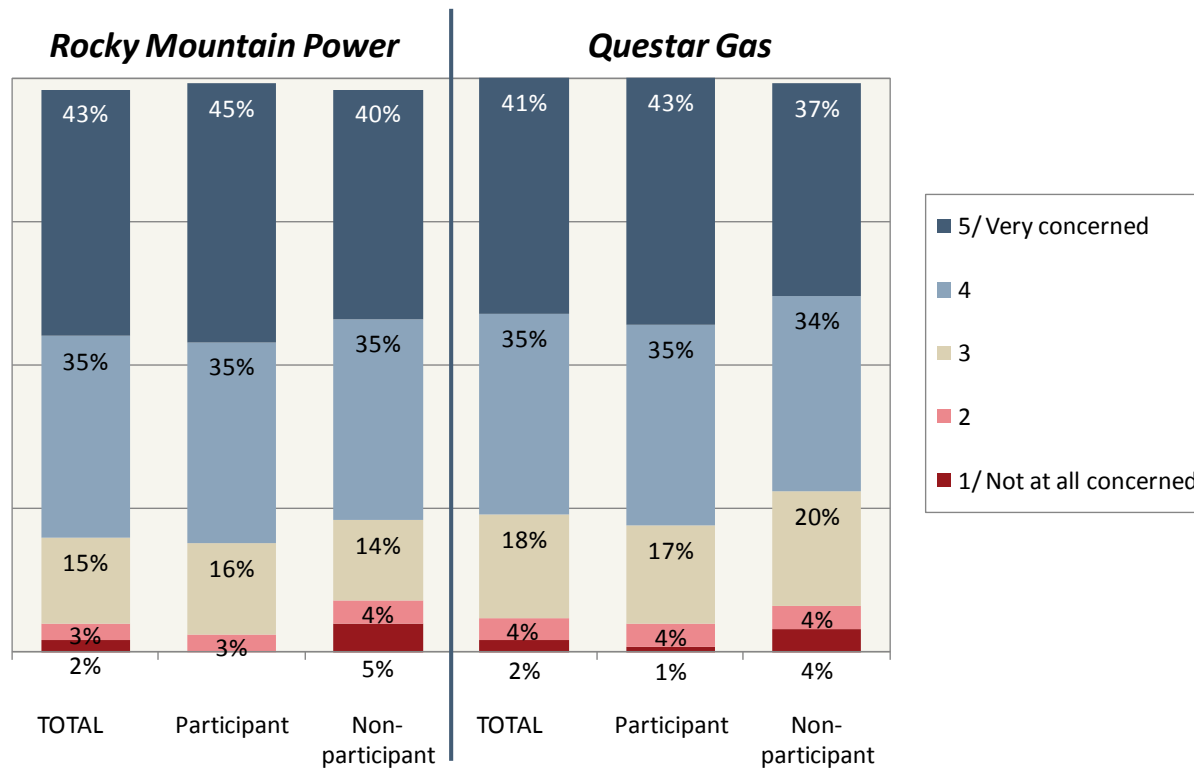


How interested do you think you or someone in your household would be in using a free online tool that would allow you to perform your own home energy assessment? ?



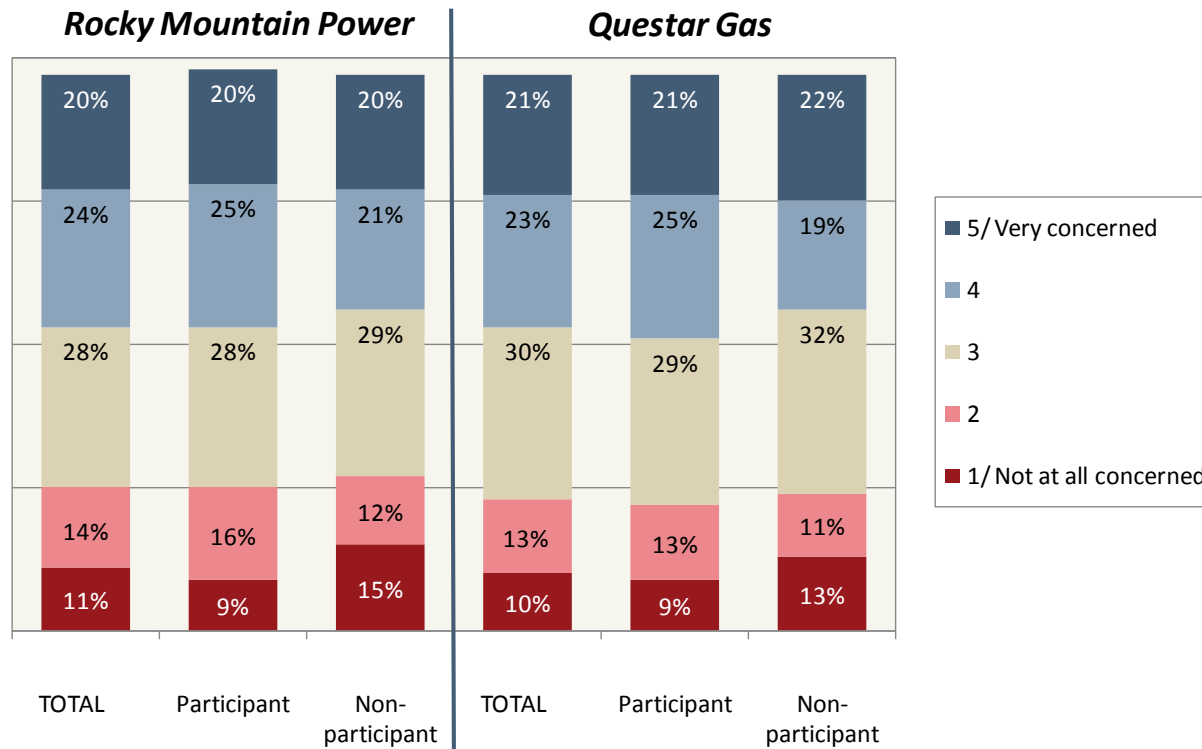
- ✓ Younger customers (likelihood increases as age decreases) and those with higher annual household income (likelihood increases as income increases) are more likely to say they are interested in an online energy assessment tool.

From what you know or have heard, how concerned are the following about conserving energy?



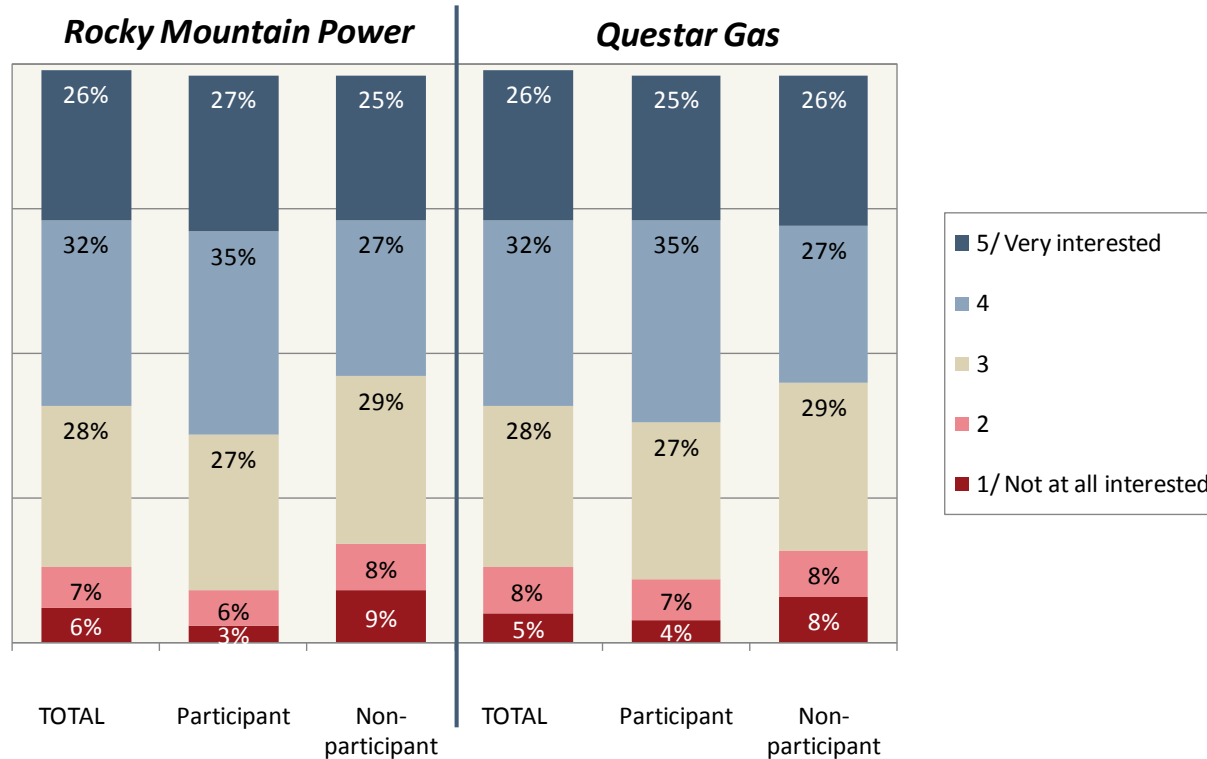
- ✓ Females and participants are more likely to say they think Rocky Mountain Power is very concerned (rating of 5) about conserving energy.
- ✓ Females and participants are more likely to say they think Questar Gas is very concerned (rating of 5) about conserving energy.

How concerned do you think the following are about finding ways to keep their rates as low as possible?



- ✓ Females and customers over age 64 are more likely to rate Rocky Mountain Power a rating as a 4 or 5 (somewhat to very concerned) about finding ways to keep their rates as low as possible.
- ✓ Females, customers over age 64, residents of Utah and Davis Counties, and those who do not live along the Wasatch Front are more likely to give ratings of 4 or 5 (somewhat to very concerned) to Questar Gas for finding ways to keep their rates as low as possible.

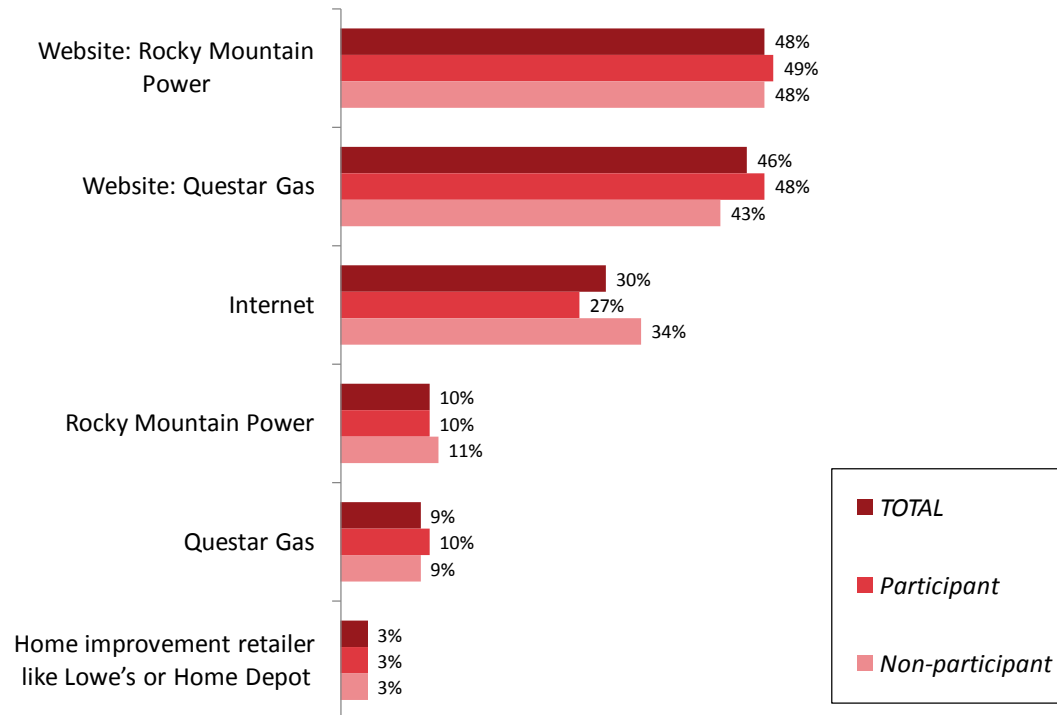
How concerned do you think the following are about helping customers save money through saving energy?



- ✓ *Females and participants are more likely to rate Rocky Mountain Power with a 4 or 5 (somewhat to very concerned) about helping customers save money through saving energy.*
- ✓ *Females and customers over age 64 are more likely to give ratings of 4 or 5 (somewhat to very concerned) to Questar Gas for helping customers save money through saving energy.*

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

Rocky Mountain Power – Top responses



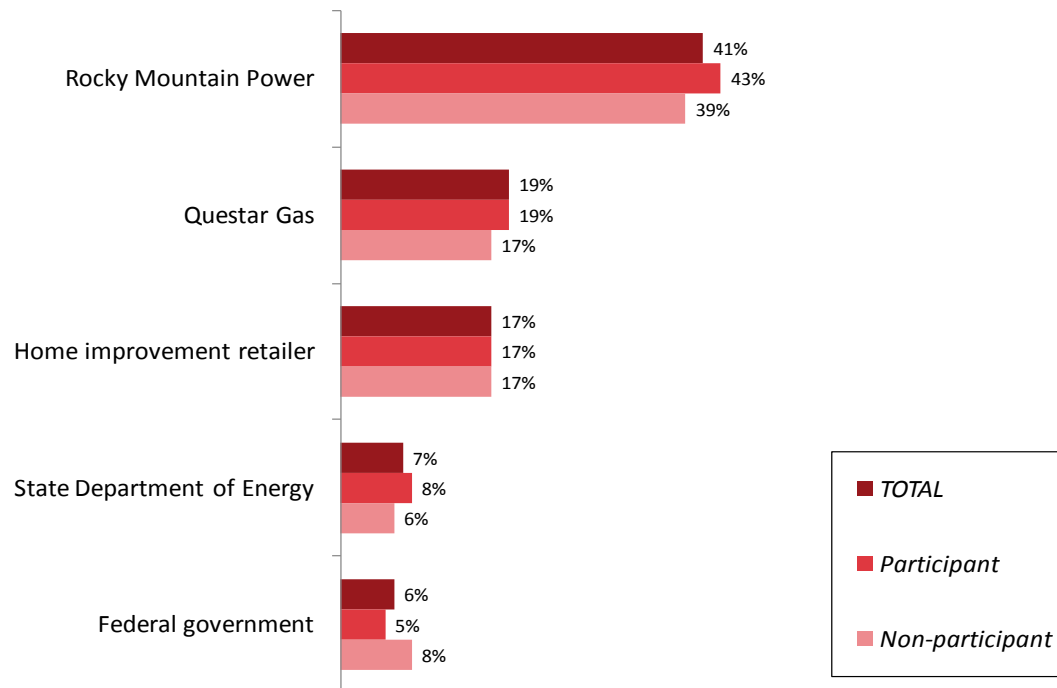
(Continued.) Now, if you wanted to know more about energy efficiency and home energy savings, rebates and/or products, where would you look for information?

Differences by customer segment

- ✓ *Males, younger customers (likelihood increases as age decreases), and those with an annual household income greater than \$90,000 are more likely to say they would look on the **Internet** for energy-efficiency information.*
- ✓ *Customers with a rooftop swamp cooler and older customers (likelihood increases as age increases) are more likely to say they would look to **Questar Gas** for energy-efficiency information.*
- ✓ *Customers over age 64 are more likely to say they would look to **Rocky Mountain Power** for energy-efficiency information.*
- ✓ *Customers with central air conditioning, younger customers (likelihood increases as age decreases), and those with higher annual household income (likelihood increases as income level increases) are more likely to say they would look to the **Questar Gas Website** for energy-efficiency information.*
- ✓ *Females, younger customers (likelihood increases as age decreases), participants, customers with an annual household income of \$60,000 to \$129,999, and residents of Salt Lake, Davis, and Weber Counties are more likely to say they would look to the **Rocky Mountain Power Website** for energy-efficiency information.*
- ✓ *Older customers (likelihood increases as age increases) and those with lower annual household income (likelihood increases as income level decreases) are more likely to mention that they would look to **some other source** for energy-efficiency information.*

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

Rocky Mountain Power – Top responses



- ✓ *Females and participants are more likely to rate Rocky Mountain Power a rating as a 4 or 5 (somewhat to very concerned) about helping customers save money through saving energy.*
- ✓ *Females and customers over age 64 are more likely to give ratings of 4 or 5 (somewhat to very concerned) to Questar Gas for helping customers save money through saving energy.*

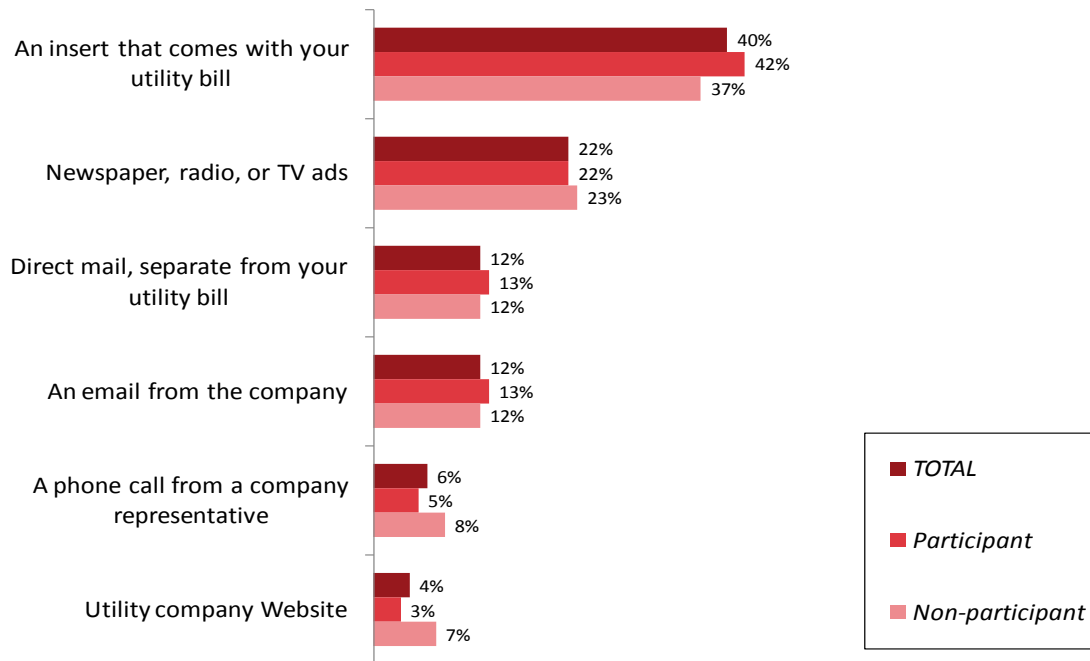
(Continued.) Which one of the following would you most likely turn to first for energy-efficiency information?

Differences by customer segment

- ✓ *Females, younger customers (likelihood increases as age decreases), participants, customers with higher annual household income (likelihood increases as income level increases), and residents of Salt Lake, Davis, and Weber Counties are more likely to say that they would most likely turn to **Rocky Mountain Power** first for energy-efficiency information.*
- ✓ *Older customers (likelihood increases as age increases), non-participants, customers with an annual household income of \$40,000 to \$59,999, and customers who do not live along the Wasatch Front are more likely to say that they would most likely turn to **Questar Gas** first for energy-efficiency information.*
- ✓ *Males, customers age 35 to 54, customers with higher annual household income (likelihood increases as income level increases), and Wasatch Front residents are more likely to say that they would most likely turn to a **home improvement retailer** first for energy-efficiency information.*

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?

Rocky Mountain Power – Top responses



- ✓ Older customers (likelihood increases as age increases) are more likely to say that a **utility bill insert** is the most effective way to communicate with them.
- ✓ Younger customers (likelihood increases as age decreases) and Wasatch Front residents are more likely to say that **newspaper, radio, or TV ads** are the best way to communicate with them.

Thank you

