



Utah DSM Customer Research

*Rocky Mountain Power
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Prepared by

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Research Objectives

The Energy Efficiency Study is an ongoing research project sponsored by Rocky Mountain Power in the Utah area. The following research objectives are addressed in the 2015 wave of the study.

1. Customer Behavior:

- What actions do customers take to conserve energy? (Q8)
- What motivates these behaviors? (Q9)
- Likelihood of customers implementing energy conservation measures in the next year? (Q10)

2. Customer Awareness

- Awareness of energy efficiency programs offered by RMP Aided and Unaided (Q10-12 & Q17-23)
- Awareness / Likelihood of participating in the Home Energy Plan (Q13-16)
- Awareness / Interest in online home energy assessment tool (Q25)

3. Customer Perceptions / Communication:

- Perception of utility company's interest in energy conservation and rates (Q26-28)
- Where do customers look for information about energy conservation? (Q29)
- Where do customers first hear about energy-conservation programs? (Q30)
- What are the best methods for communicating with customers? (Q31)
- What are customer perceptions of the importance of utility companies offering energy-conservation programs? (Q6)

4. What energy conservation measures should be implemented?

“Q” = Question number in the survey, administered over the phone to Utah residents.

Red = Difference is statistically significant at the 95% level.

Note: In this report, the sample size is n=500, unless otherwise noted on specific charts.



Methodology

- **Surveys were administered via phone interviews with 500 Rocky Mountain Power residential customers.**
 - Both cell phones and land-line phones were sampled to ensure an accurate representation of the population.
 - Customers were screened to make sure they meet the following criteria:
 - Utah residents
 - 18+ years old
 - Household decision maker for electric utility decisions
- **Interviews were conducted in order to gather data on the following:**
 - Energy-saving behaviors
 - Awareness of energy efficiency programs
 - Preferred avenues of communication
 - Perceptions of Rocky Mountain Power's priorities and concerns
- **Average survey length was ~13 minutes**
- **Phone survey was in field from September 14 to 25, 2015**
- **Responses from this year's survey were compared with results from similar surveys in 2014, 2013, and 2012.**
 - They were evaluated for statistically significant differences at the 95% confidence level.
- **Rocky Mountain Power performed this study in previous years in conjunction with Questar. Questar opted out of the study in 2014, thus changing the wording and comprehension of a few questions. Questions that were likely understood differently prior to 2014 by customers have been noted within the deck.**



Demographic Data

The demographics of the survey respondents generally resembled the actual demographic makeup of Utah. Renters, the 18-24 demographic, and those making less than \$20,000 were underrepresented because they are less likely to be a household decision-maker.

	Utah Demographic	Survey Response
Male/Female	50% : 50%	50% : 50%
Age: 18-24	16%	3%
25-34	23%	25%
35-44	19%	16%
45-54	16%	16%
55-64	13%	18%
65+	14%	21%
Rent/Own	30% / 70%	24% / 75%
Income: Under \$20,000	13%	6%
\$20,000-\$39,999	19%	15%
\$40,000-\$59,999	19%	20%
\$60,000-\$89,999*	27%	20%
\$90,000-\$129,999*	9%	17%
\$130,000-\$199,999*	9%	4%
\$200,000 or more	3%	2%

* Income groupings shown are the groupings used for the survey, which differ from those used in Utah's demographic data. Utah demographic data listed in chart is the closest representation to those groupings.



Executive Summary

1. Behavior

Customers are most likely to plan to save energy by using energy saving light bulbs, turning off lights when they leave the room, or installing energy efficient appliances. The actions they are most likely to be already doing are using energy saving light bulbs, turning off lights when leaving a room, and adjusting the thermostat.

2. Awareness

Since 2012, both aided and unaided awareness of energy efficiency programs have been slowly declining, apart from Time of Day (consistent awareness) and wattsmart (increased awareness).

4. Communication

Utility bill inserts and emails are the most effective methods to inform customers about conservation programs. Additionally, customers continue to choose the internet to find more information about the programs.

5. Perceptions

Based on this year's response, customers feel that Rocky Mountain Power is more concerned with keeping rates low and helping customers save money than last year.



Key Findings

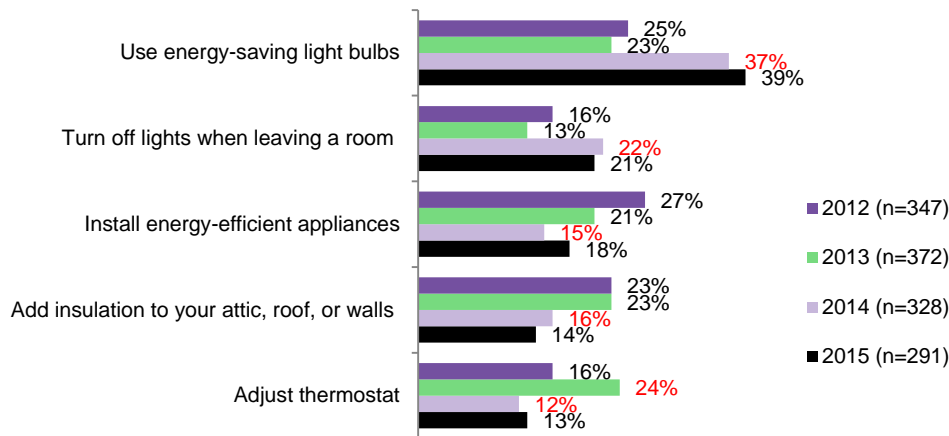
Key Findings

Customers continue to feel that it is somewhat or very important for Rocky Mountain Power to offer energy conservation programs.

Ninety percent of Rocky Mountain Power customers feel it is *Very Important* or *Somewhat Important* for utility companies to offer energy conservation programs.

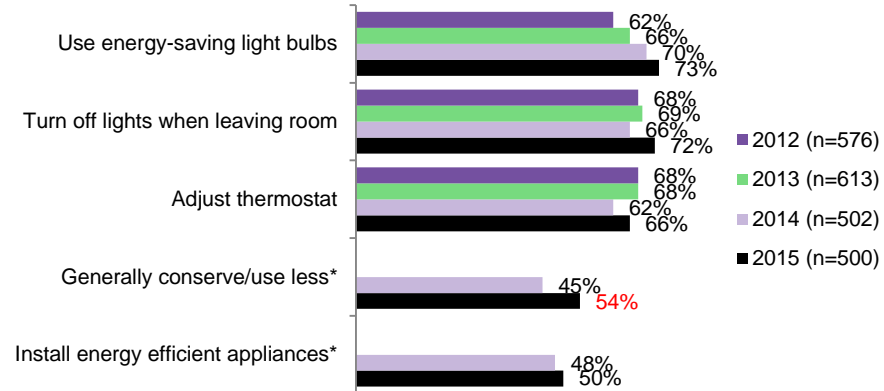


Top 5 Actions Taken to Save Energy

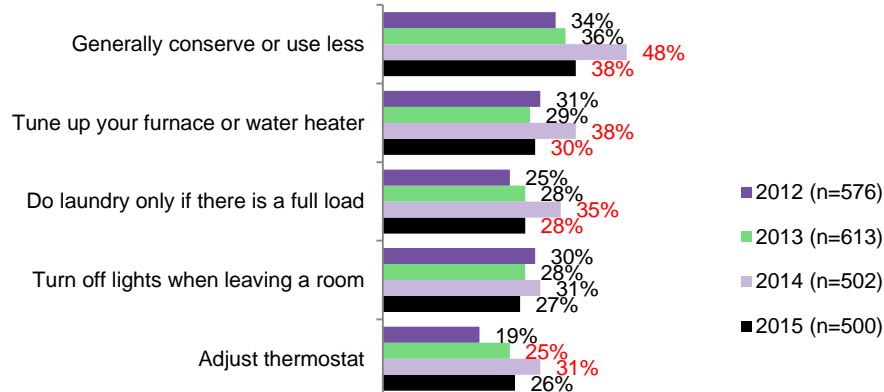


Top Five in each category

Already do / done



Very somewhat or very likely to do in the next year



Red indicates significantly different than previous year

*Note: No data available prior to 2014.

Q6. How important is it for utility companies to offer customers programs to help conserve energy?

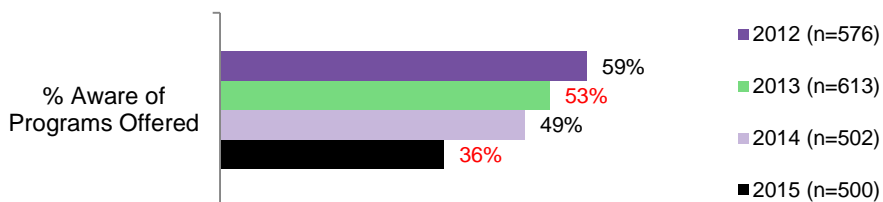
Q8. What actions have you taken in your home in order to save energy?

Utah DSM Survey

Key Findings

Compared to last year, the percentage of customers aware of Rocky Mountain Power energy efficiency programs has decreased significantly.

Energy-Saving Program Awareness



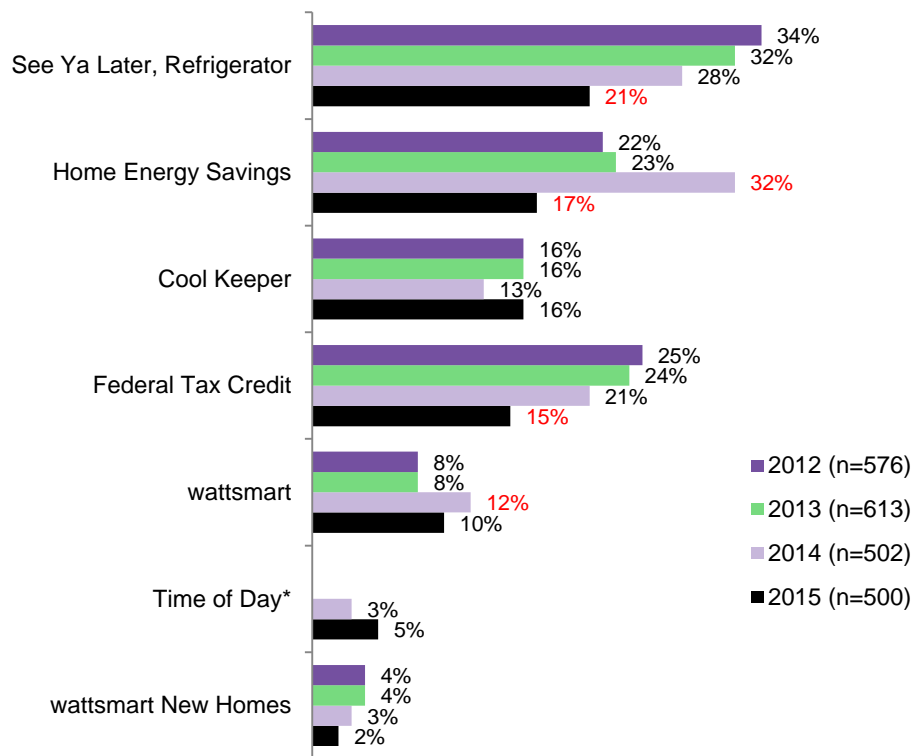
Among those who say they are aware that such programs are offered, ...

- Top unaided responses of what they ask residents to do are:

2012--2015

- Conserve Energy: (35%, 23%, 15%, 33%)
- Buy/replace appliances: (18%, 15%, 23%, 17%)
- Home temperature/ thermostat: (7%, 4%, 6%, 16%)

Current and Past Participants



Red indicates significantly different than previous year

*Note: No data available prior to 2014.

Q10. Are you aware of any programs offered by Rocky Mountain Power to help you save energy or lower your utility bills?

Q11. From what you know or have heard, what is it that these programs ask people to do?

Q17-23. 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.

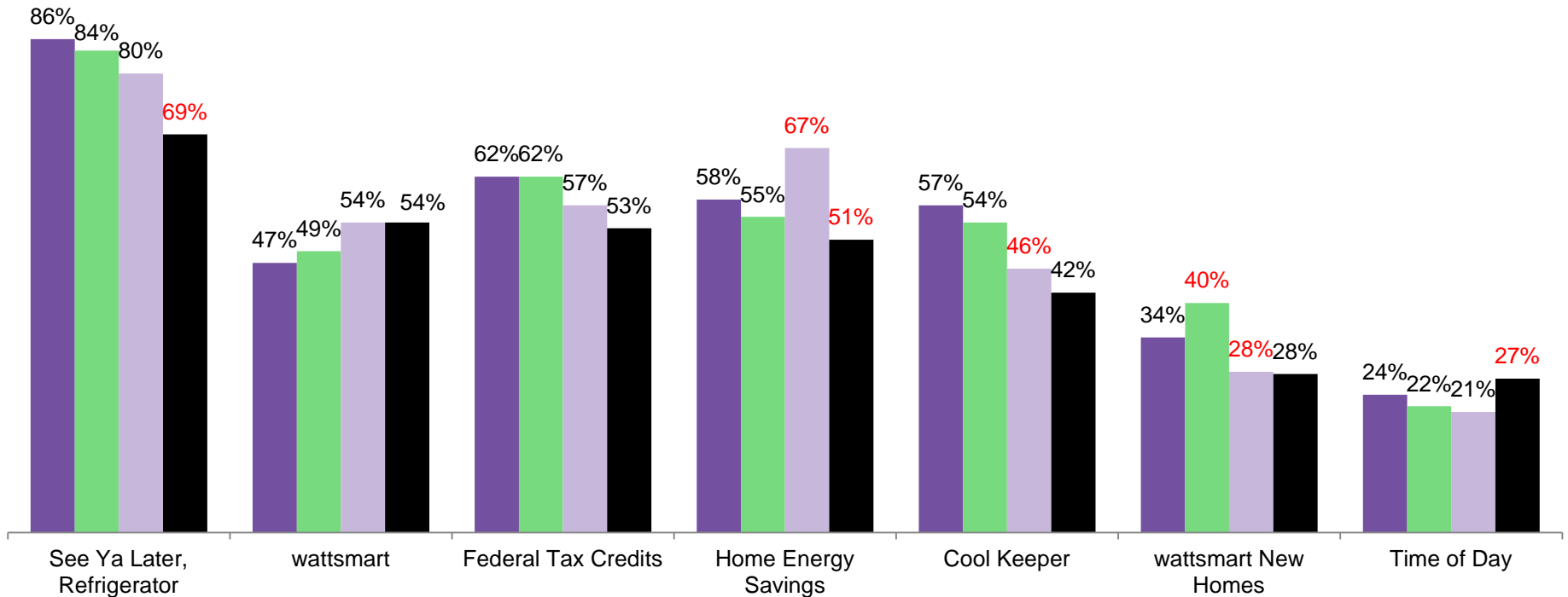
Key Findings

Awareness of all programs except Time of Day decreased in 2015.

Total Awareness of Energy Programs

(Sum of 1. A current participant, 2. A past participant, 3. Aware of but never participated, and 4. Unaided awareness)

■ 2012 (n=576) ■ 2013 (n=613) ■ 2014 (n=502) ■ 2015 (n=500)



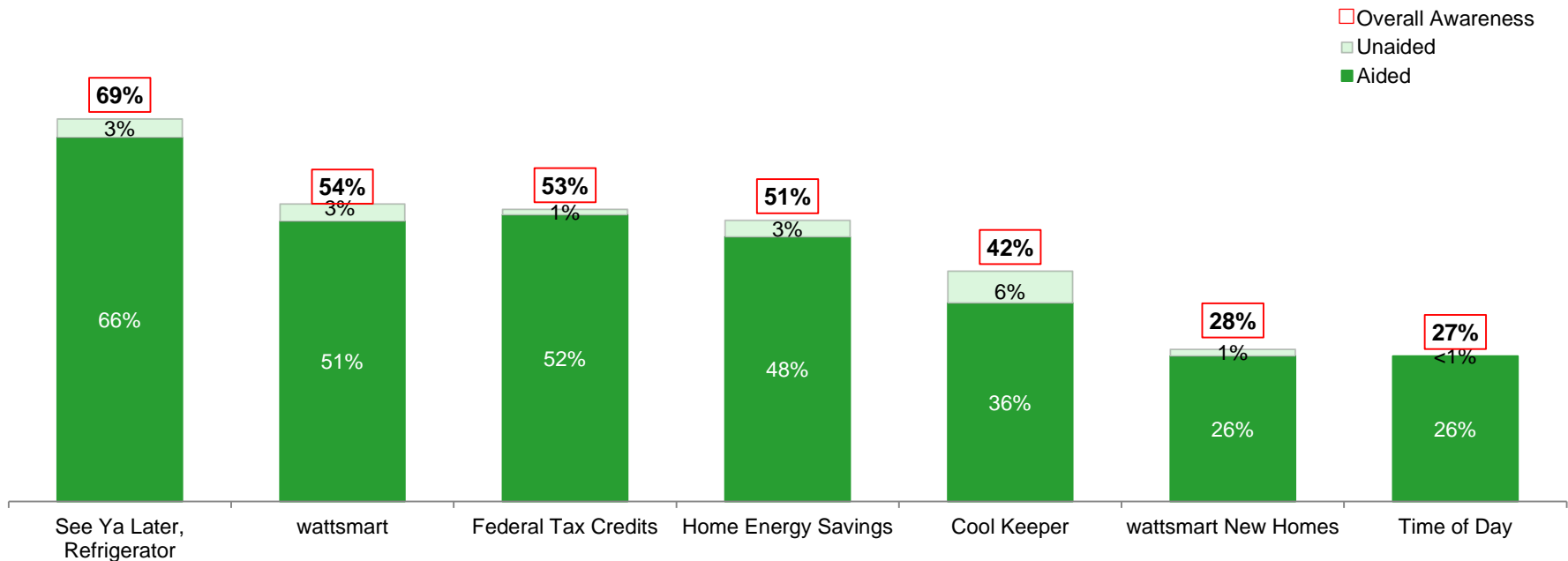
Q12. What energy efficiency or conservation programs are you aware of from Rocky Mountain Power?
 Q17-23. Now I'm going to read some descriptions of energy efficiency programs offered by Rocky Mountain Power. For each, please let me know if you were aware of it before this call. And, if so, if you have ever participated in the program.

Red indicates significantly different than previous year

Key Findings

See Ya Later, Refrigerator enjoys the greatest overall awareness of all Rocky Mountain Power programs.

Overall Awareness for Rocky Mountain Power Energy Efficiency Programs (2015: Overall Awareness; n=500)



Q12. What energy efficiency or conservation programs are you aware of from Rocky Mountain Power?
Q17-23. 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.

Awareness Crosstab Data

	18 to 24 Years	25 to 34 Years	35 to 44 Years	45 to 54 Years	55 to 64 Years	65 or over	Male	Female
Q12 and Q17-23 Sample Size	13	125	80	79	89	107	250	250
% Aware of Programs Offered	31%	37%	33%	42%	39%	30%	40%	32%
Total awareness of <i>See Ya Later, Refrigerator</i>	15%	58%	59%	72%	83%	84%	65%	74%
Total awareness of <i>Federal Tax Credits</i>	8%	51%	51%	54%	66%	50%	54%	52%
Total awareness of <i>Home Energy Savings</i>	31%	44%	49%	53%	56%	57%	53%	49%
Total awareness of <i>Cool Keeper</i>	23%	35%	39%	41%	49%	50%	41%	42%
Total awareness of <i>wattsmart</i>	46%	53%	48%	58%	58%	53%	53%	55%
Total awareness of <i>wattsmart New Homes</i>	15%	26%	24%	22%	38%	27%	27%	28%
Total awareness of <i>Time of Day</i>	0%	22%	23%	33%	29%	32%	28%	25%

	Less than \$20,000	\$20,000 - \$39,999	\$40,000 - \$59,999	\$60,000 - \$89,999	\$90,000 - \$129,999	\$130,000 - \$199,99	\$200,000 or more
Q12 and Q17-23 Sample Size	32	73	99	101	83	22	11
% Aware of Programs Offered	31%	42%	31%	36%	36%	41%	64%
Total awareness of <i>See Ya Later, Refrigerator</i>	69%	71%	74%	66%	72%	73%	64%
Total awareness of <i>Federal Tax Credits</i>	31%	33%	48%	58%	59%	73%	73%
Total awareness of <i>Home Energy Savings</i>	28%	44%	42%	59%	52%	77%	73%
Total awareness of <i>Cool Keeper</i>	28%	40%	44%	47%	47%	50%	36%
Total awareness of <i>wattsmart</i>	44%	58%	48%	56%	63%	55%	55%
Total awareness of <i>wattsmart New Homes</i>	22%	23%	25%	38%	24%	27%	18%
Total awareness of <i>Time of Day</i>	22%	26%	25%	30%	31%	18%	18%

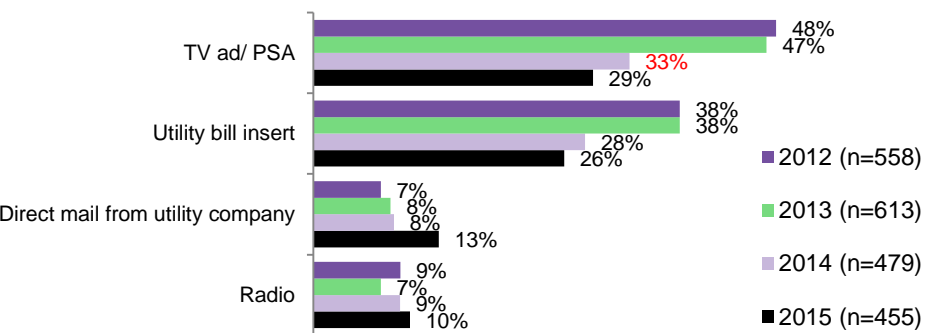
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Utah DSM Survey

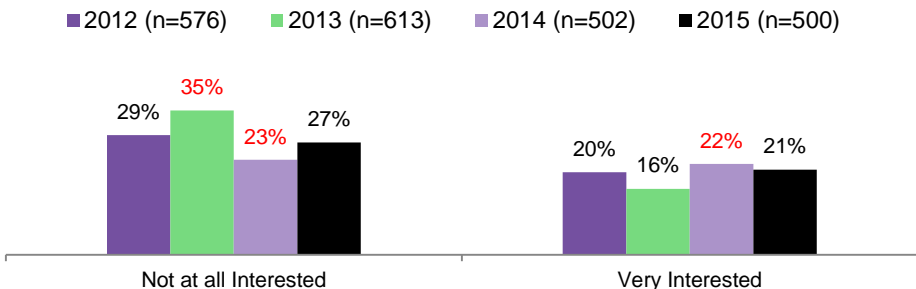
Key Findings

Customers continue to be most likely to first hear about Rocky Mountain Power's energy efficiency programs via TV or Utility Bill Inserts.

First heard about these programs from...

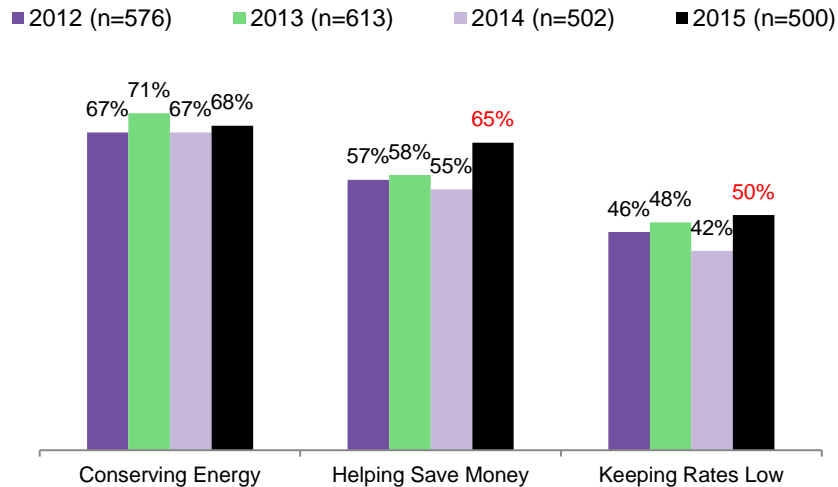


Interest in Free Online Assessment



The percentage of customers who perceive that Rocky Mountain Power is concerned with Helping Customers Save Money and Keeping Rates Low has increased significantly since 2014.

How concerned is Rocky Mountain Power about...? (Top 2 Box Score)



- Q24. Where did you first see or hear about these energy savings programs?
- Q25. 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?
- Q26. From what you know or have heard, how concerned is Rocky Mountain Power about conserving energy?
- Q27. How concerned do you think Rocky Mountain Power is about finding ways to keep their rates as low as possible?
- Q28. How concerned do you think Rocky Mountain Power is about helping customers save money through saving energy?

Red indicates significantly different than previous year

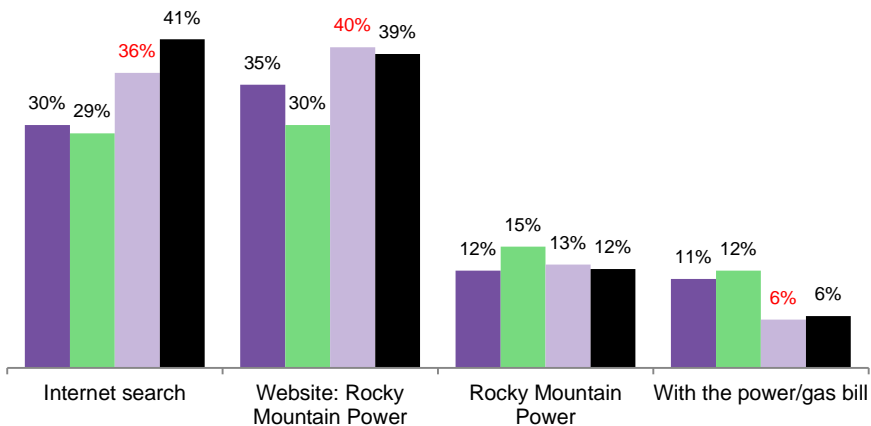
Key Findings

The Rocky Mountain Power website remains the preferred first source for energy efficiency information. Utility bill inserts and emails are perceived to be the most effective means for communication.

Customers say they would turn to a general internet search more often than any other source for energy efficiency information.

Where would you look for more information regarding home energy savings, rebates, etc...?

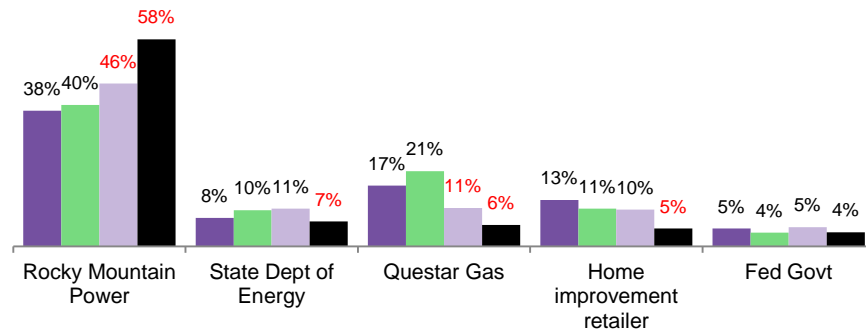
■ 2012 (n=576) ■ 2013 (n=613) ■ 2014 (n=502) ■ 2015 (n=500)



Note: Removal of Questar from survey in 2014 may have affected data.

Where would you turn to first for energy-efficiency information?

■ 2012 (n=576) ■ 2013 (n=613) ■ 2014 (n=502) ■ 2015 (n=500)



Most Effective / Preferred Communication

Utility bill inserts and newspaper / radio / TV ads are viewed as the most effective way to communicate how to lower energy usage and to save money.

- Utility bill insert: 34% (down 8% since 2014)
- Email from company: 21% (up 7%)
- Newspaper / Radio / TV ad: 13% (down 7%)
- Direct mail: 13% (up 1%)

Q29. Now, if you wanted to know more about energy efficiency and home energy savings, rebates and/or products, where would you look for information?

Q30. Which one of the following would you most likely turn to first for energy-efficiency information?

Q31. 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?

Key Findings

TV advertisements and public announcements are the top ways customers hear about energy saving programs. Females are more likely cite utility bill inserts as a form of awareness.

	18 to 24	25 to 34	35 to 44	45 to 54	55 to 64	65 or over	Male	Female
Q24 Sample Size	9	109	68	78	82	102	226	253
Awareness Source: TV ad/ PSA	44%	23%	31%	27%	37%	32%	27%	32%
Awareness Source: Utility bill insert	0%	20%	25%	21%	27%	39%	22%	31%
Awareness Source: Direct mail from utility company	22%	16%	12%	10%	12%	14%	14%	13%
Awareness Source: Radio/ radio ad	0%	13%	16%	14%	9%	2%	15%	5%
Q8 Sample Size	7	70	56	46	54	52	141	150
Actions Taken: Use energy-saving light bulbs	57%	49%	48%	22%	35%	35%	45%	33%
Actions Taken: Turn off lights when leaving room	29%	16%	23%	24%	17%	23%	20%	21%
Actions Taken: Install energy-efficient appliances	14%	21%	21%	13%	15%	17%	16%	20%
Actions Taken: Add insulation to attic, roof, walls	0%	13%	18%	13%	15%	12%	13%	15%
Actions Taken: Adjust thermostat	29%	13%	16%	13%	7%	12%	16%	10%
Actions Taken: Generally conserve or use less energy	0%	10%	20%	11%	11%	12%	13%	13%
Actions Taken: Energy-efficient air conditioner/furnace	29%	3%	11%	13%	15%	17%	11%	13%
Actions Taken: Install energy-efficient doors/windows	0%	10%	13%	9%	6%	15%	6%	15%



Key Findings

Lower income customers (less than \$40K) are more likely to turn off lights when leaving the room to save energy.

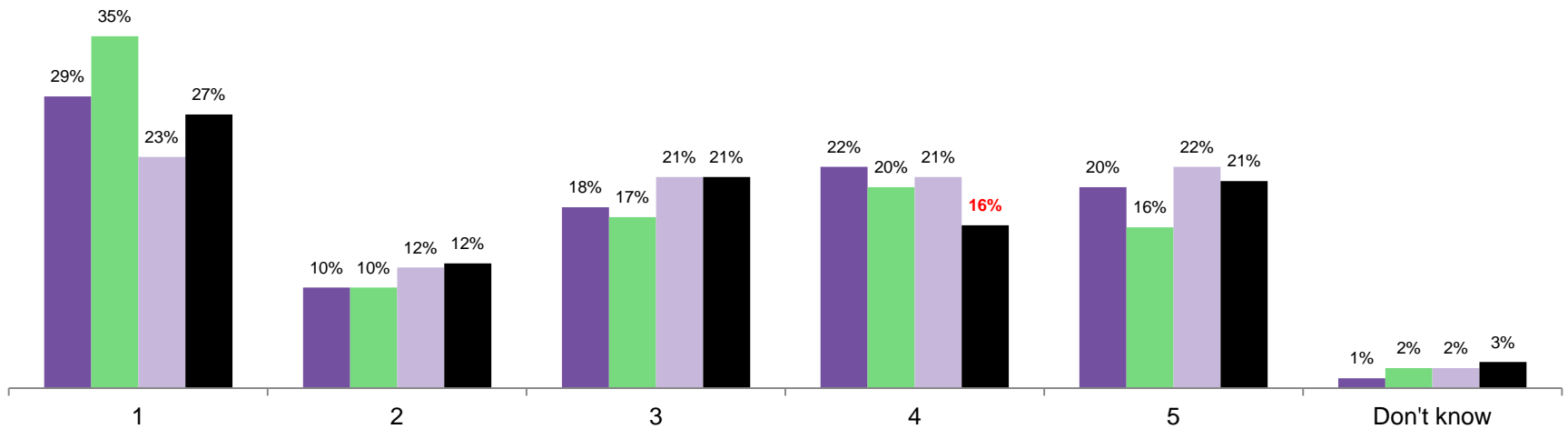
	Less than \$20,000	\$20,000 - \$39,999	\$40,000 - \$59,999	\$60,000 - \$89,999	\$90,000 - \$129,999	\$130,000 - \$199,999	\$200,000 or more
Q24 Sample Size	28	62	92	95	76	20	10
Awareness Source: TV ad/ PSA	21%	26%	38%	24%	36%	30%	20%
Awareness Source: Utility bill insert	25%	27%	18%	24%	21%	40%	20%
Awareness Source: Direct mail from utility company	11%	13%	13%	15%	9%	15%	30%
Awareness Source: Radio/ radio ad	11%	6%	8%	13%	13%	20%	50%
Q8 Sample Size	11	39	62	57	53	17	8
Actions Taken: Use energy-saving light bulbs	45%	41%	32%	37%	42%	47%	25%
Actions Taken: Turn off lights when leaving room	45%	36%	13%	19%	9%	18%	13%
Actions Taken: Install energy-efficient appliances	18%	15%	19%	21%	17%	18%	38%
Actions Taken: Add insulation to attic, roof, walls	27%	13%	11%	11%	21%	18%	13%
Actions Taken: Adjust thermostat	9%	18%	10%	16%	6%	18%	0%
Actions Taken: Generally conserve or use less energy	27%	15%	10%	18%	6%	6%	13%
Actions Taken: Energy-efficient air conditioner/furnace	9%	8%	10%	11%	15%	6%	25%
Actions Taken: Install energy-efficient doors/windows	0%	13%	15%	4%	17%	6%	13%

Key Findings

One in five (21%) are very interested in using a free online tool to perform a home energy assessment, consistent with figures found in 2014.

Interest in Using Free Online Tool

■ 2012 (n=576) ■ 2013 (n=613) ■ 2014 (n=502) ■ 2015 (n=500)



Q25. 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?

Utah DSM Survey

Red indicates significantly different than previous year



Conclusions & Recommendations

Conclusions

- As shown in past years, customers are driven to conserve energy primarily by the desire to save money. No other reason to conserve compares to this motivation. In 2015, customers were more likely to conserve energy by using energy saving light bulbs than any other method.
- Customers have increased the number of energy saving activities they already do over the past year. In the coming year, fewer people than in 2014 plan to engage in new energy saving efforts.
- General awareness of programs to save energy has decreased significantly since last year, continuing a trend of declining awareness since 2012.
- Utility bill inserts and emails are typically how customers learn about energy conservation programs. To find more information about the programs, respondents overwhelmingly turn to the Internet as the number one source for information.

Recommendations

- Show customers the long term financial savings opportunities of investments made in energy conservation programs. Cost savings are the factor most likely to impact behavior change.
- Leverage customers' tendency to turn to the Internet, and more specifically Rocky Mountain Power, for information about energy conservation. Continue efforts to offer an engaging and valuable experience on rockymountainpower.net.
- Consider advertising campaigns designed to promote specific energy conservation programs. Awareness of specific programs has been in decline over the past several years, and program awareness, as well as a clear call to action, are crucial in increasing customer engagement in DSM programs.



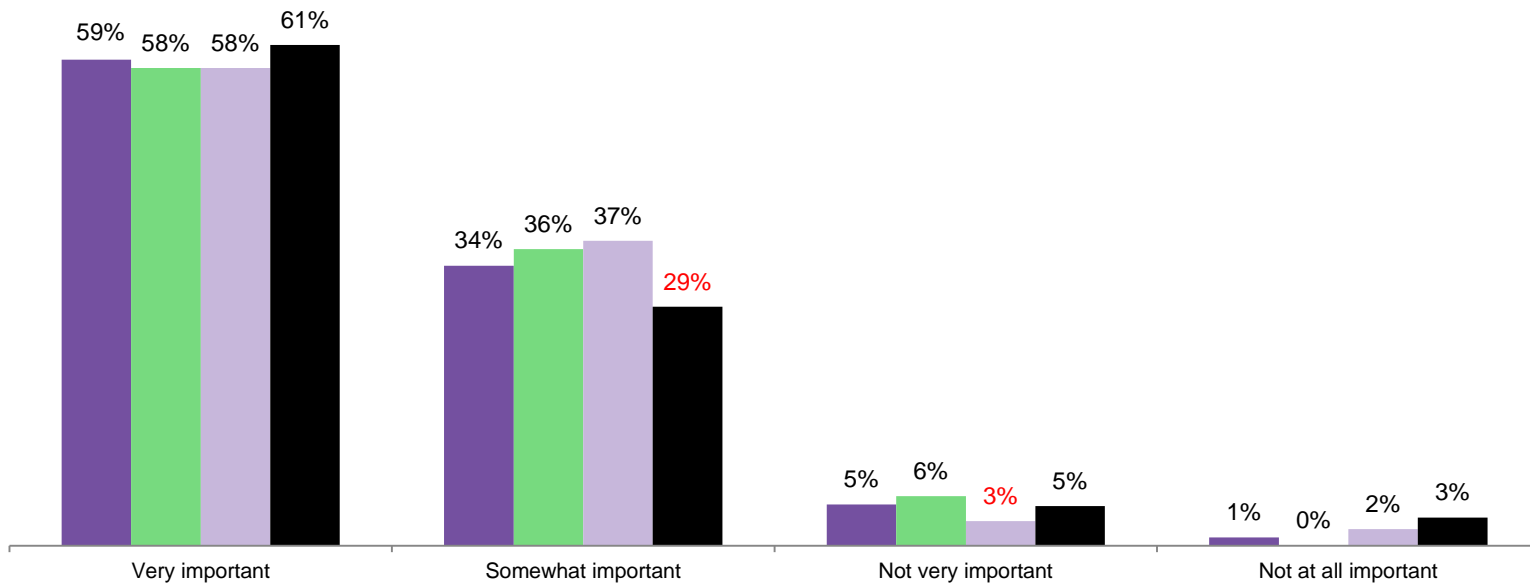
Illustrated Results and Findings

Energy Conservation Programs

Ninety percent of customers feel it is somewhat or very important for utility companies to offer energy conservation programs.

Importance of Utility Energy Conservation Program Offering

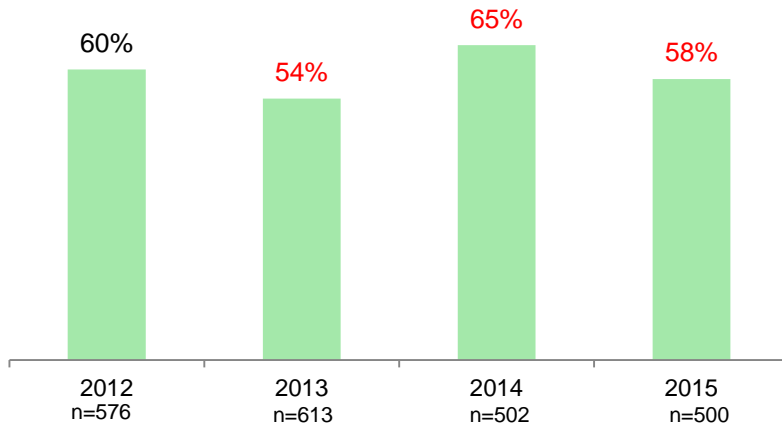
■ 2012 (n=576) ■ 2013 (n=613) ■ 2014 (n=502) ■ 2015 (n=500)



Action Taken To Conserve Energy

The percent of customers who took actions to conserve energy has decreased significantly in the past year, returning to levels similar to 2012 and 2013.

Took Action to Conserve Energy (Yes)

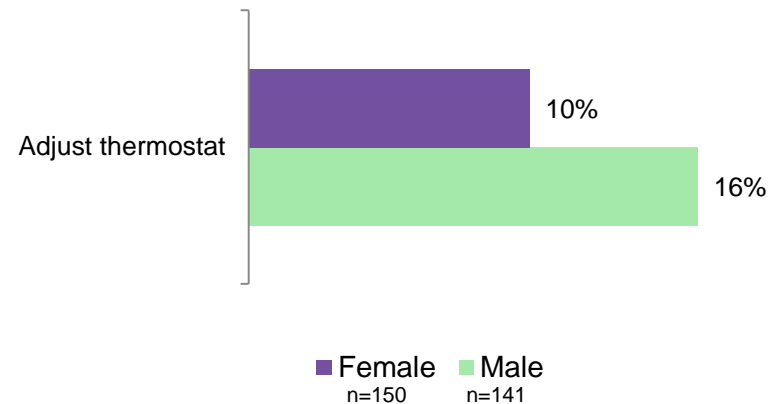


Male vs. Female

Women are slightly less likely than men to adjust the thermostat.

Actions Taken to Conserve Energy

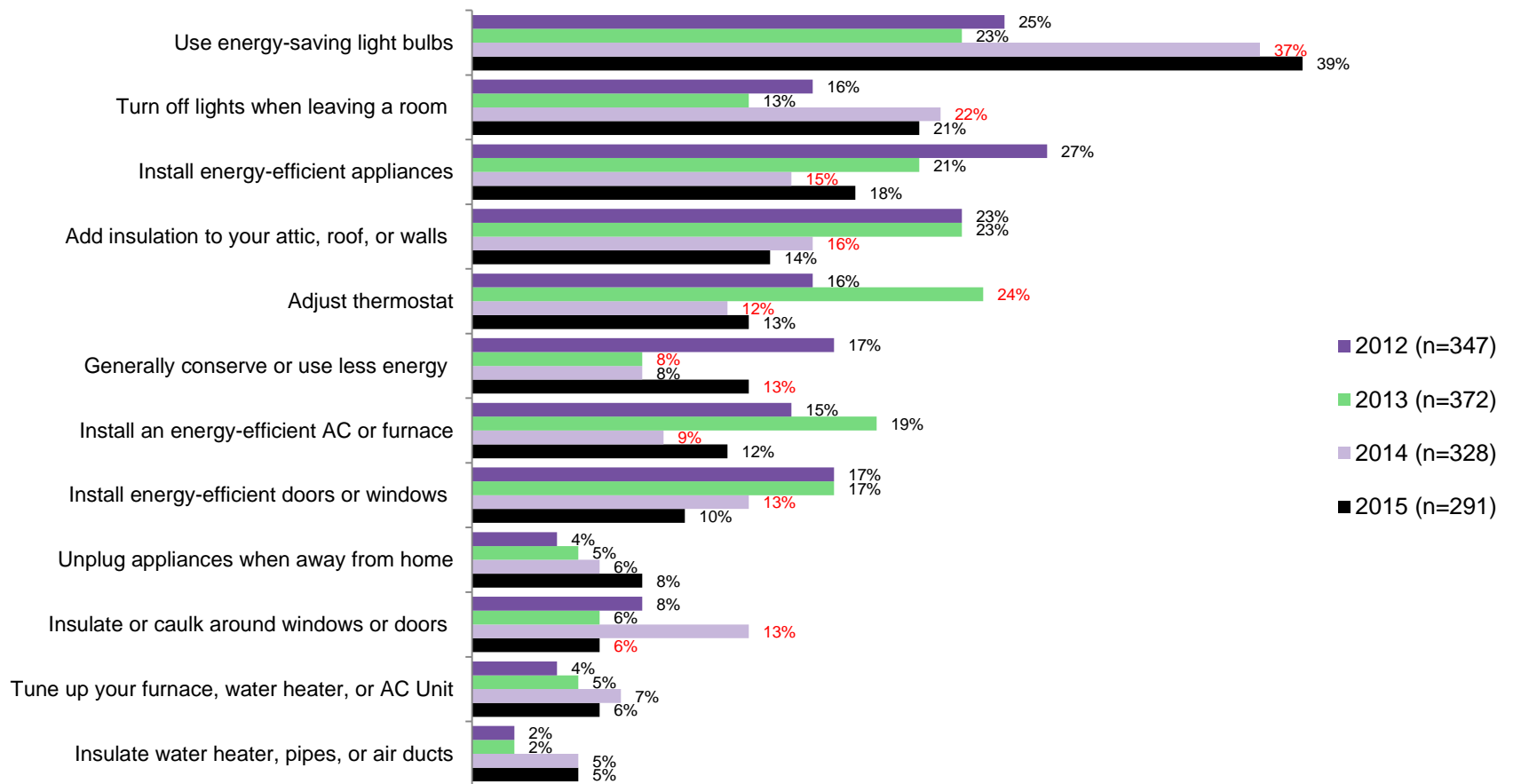
[Male vs. Female]



Specific Actions Taken To Save Energy

In 2015, customers are most likely to save energy by using energy-saving light bulbs and by turning off the lights when leaving a room. Customers are significantly more likely to generally conserve energy and significantly less likely to add insulation or caulk around doors and windows than in 2014.

Actions taken to save energy

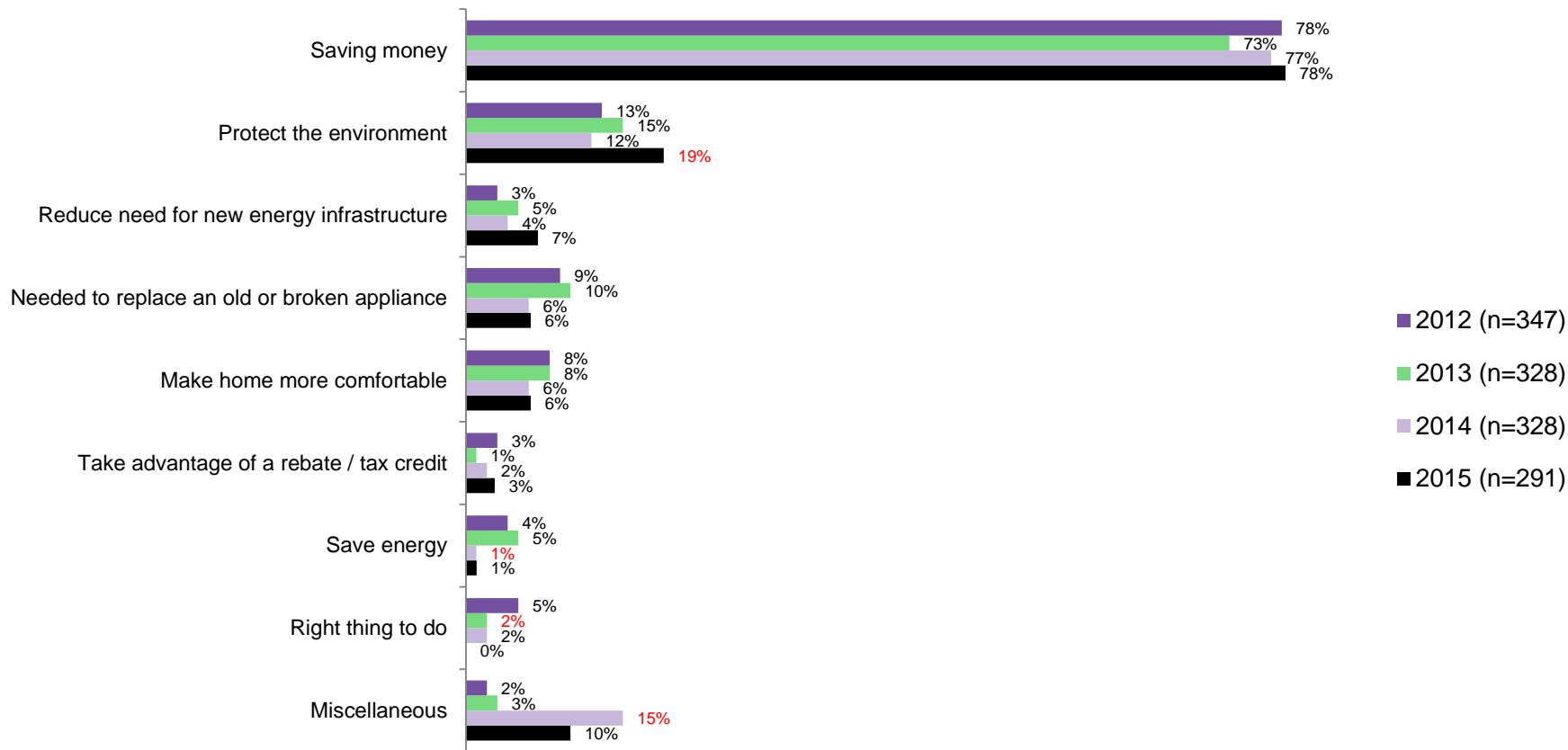


Red indicates significantly different than previous year

Reasons to Conserve Energy

Saving money is by far the main reason why customers choose to conserve energy.

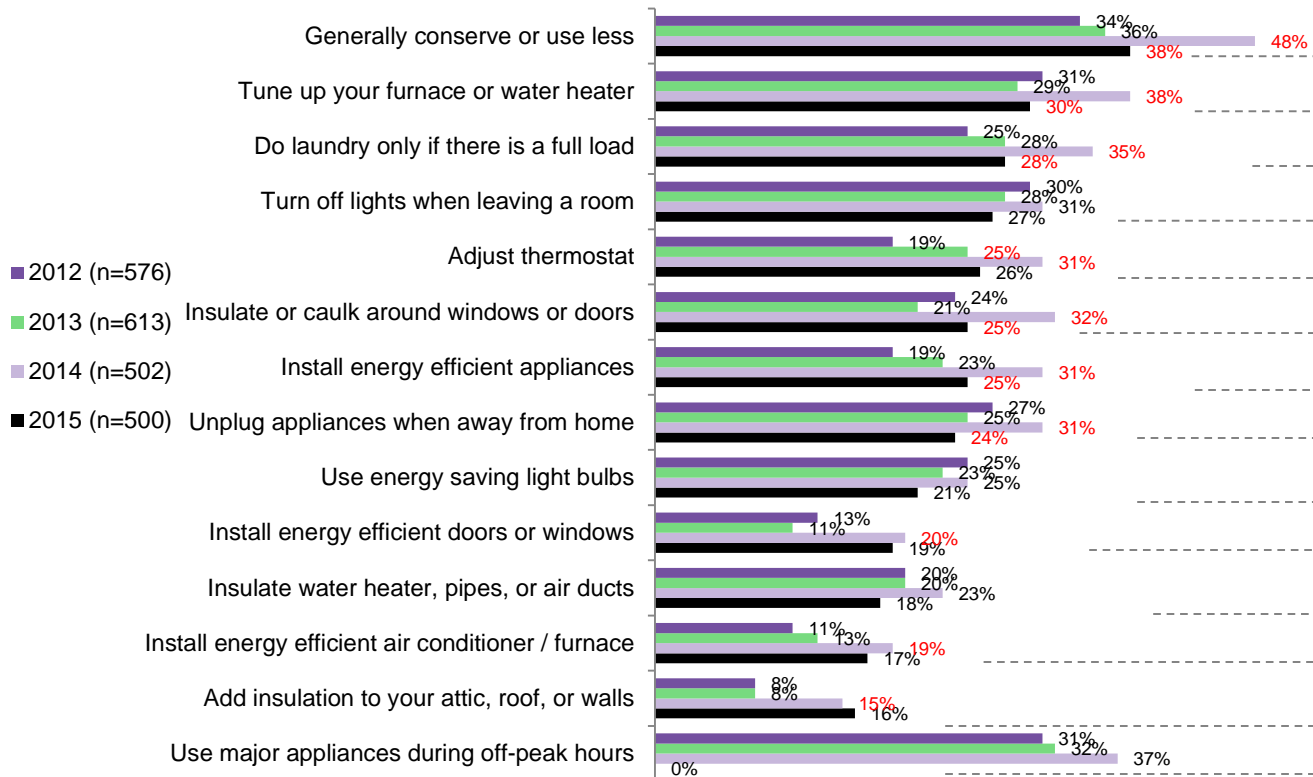
Main Reasons to Conserve Energy



Likelihood to Use Energy Saving Measures

Customers state they are most likely to generally conserve or use less energy in the coming year. Use of energy saving light bulbs is the energy saving measure most commonly already in practice.

Likelihood of Taking Energy Saving Measures
(Somewhat & Very Likely)



Already do/done it: 2015
54%
39%
49%
72%
66%
49%
50%
33%
73%
44%
37%
46%
49%
N/A

Note: Removed "Using major appliances during off-peak hours" in 2015.

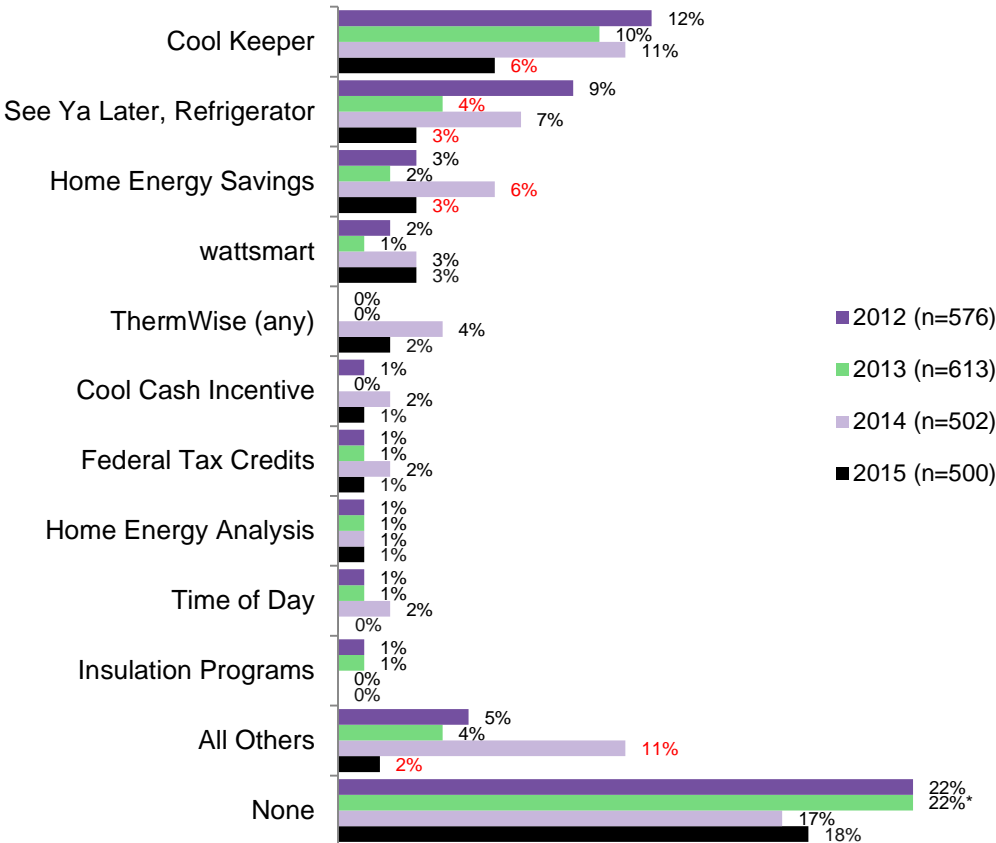
Red indicates significantly different than previous year

Q10. Now I'd like you to think about some specific 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 do or have already done, please let me know

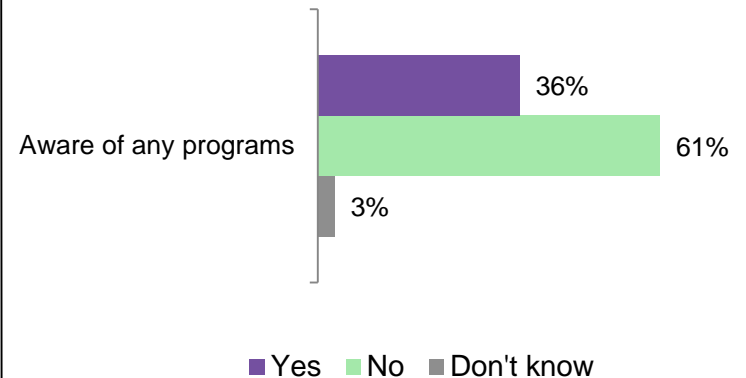
Program Awareness (Unaided)

Customers have the greatest unaided awareness of the Cool Keeper, See Ya Later, Refrigerator, and wattsmart programs, though unaided awareness of all three is significantly lower than in 2014.

What programs are you aware of?



Awareness of Programs (n=500)



Q10. Are you aware of any programs offered by Rocky Mountain Power to help you save energy or lower your utility bills?

Q12. What energy efficiency or conservation programs are you aware of from Rocky Mountain Power?

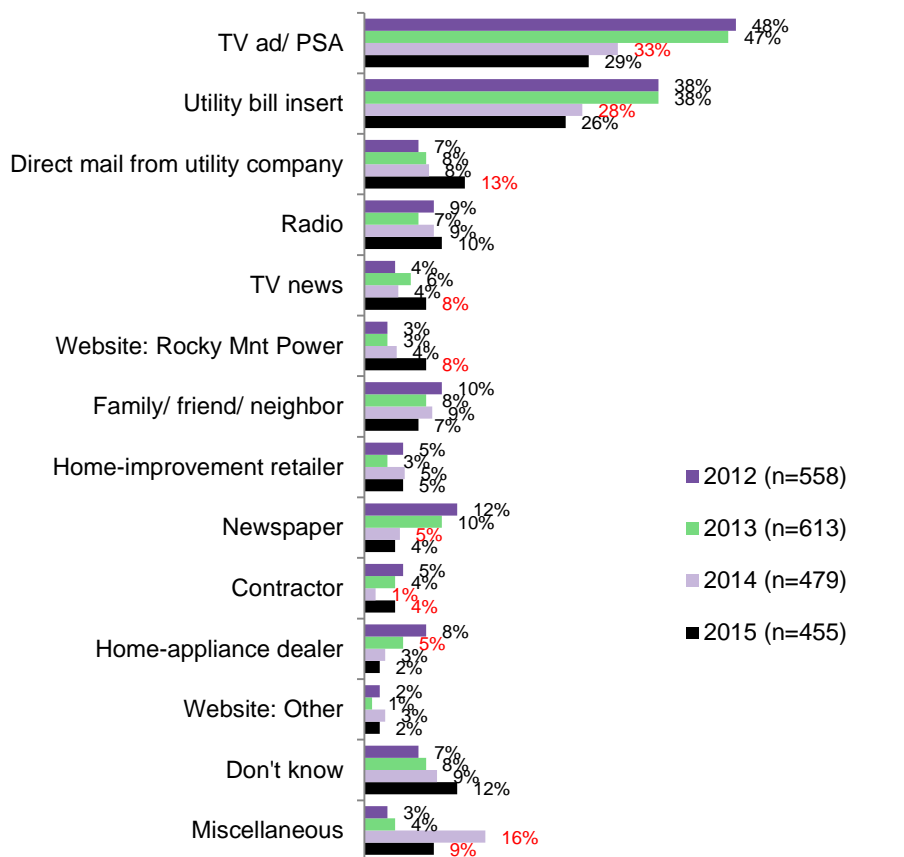
Utah DSM Survey

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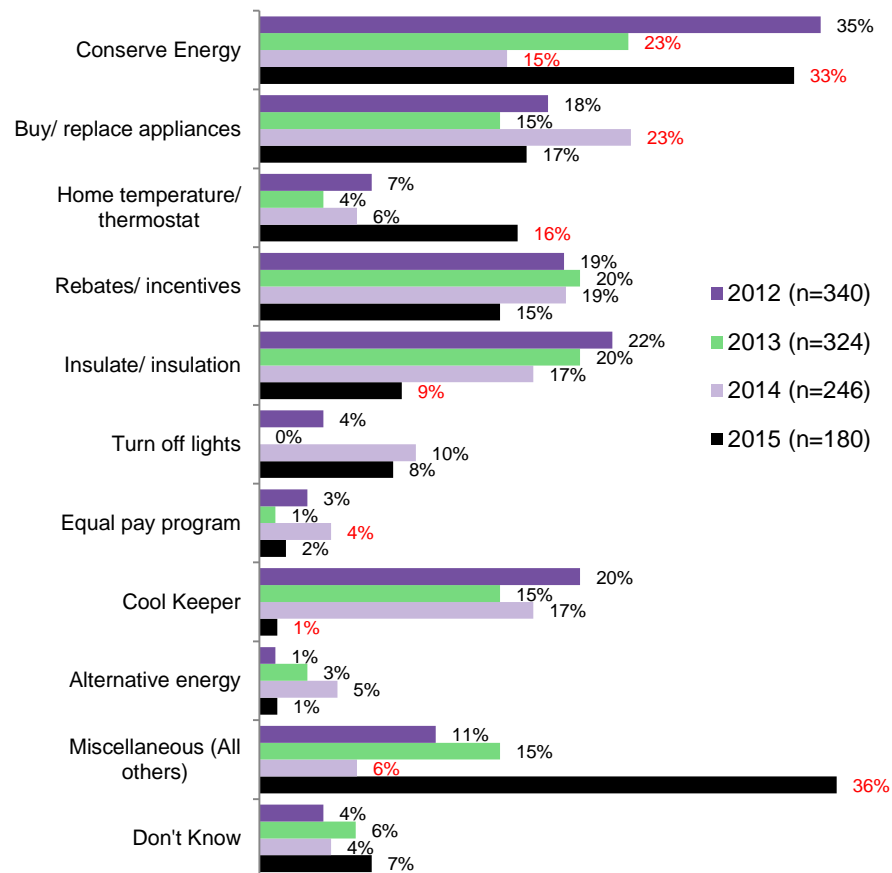
Source of Program Awareness

Despite a slight decrease in 2015, customers are still most likely to first see/hear about energy efficiency programs through TV ads and utility bill inserts. Significantly more customers in 2015 believe the energy programs ask you to conserve energy, compared to 2014.

Where customer first saw / heard about programs



These programs ask you to...



Red indicates significantly different than previous year

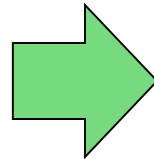
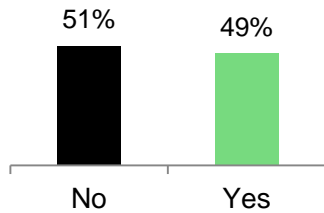
Q11. From what you know or have heard, what is it that these programs ask people to do?
 Q24. Where did you first see or hear about these energy savings programs?
 Utah DSM Survey

Home Energy Plan

About half of customers are aware of the report. Two thirds of all customers who aren't aware are somewhat or very interested in receiving these reports.

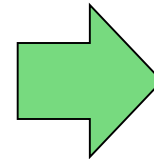
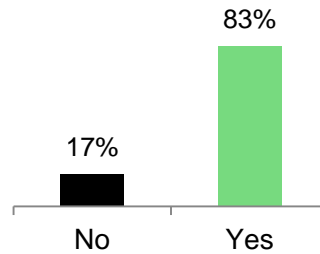
Awareness of Report that Compares to Neighbors' Usage

n=500



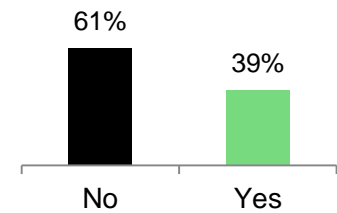
Household Received Report

n=243



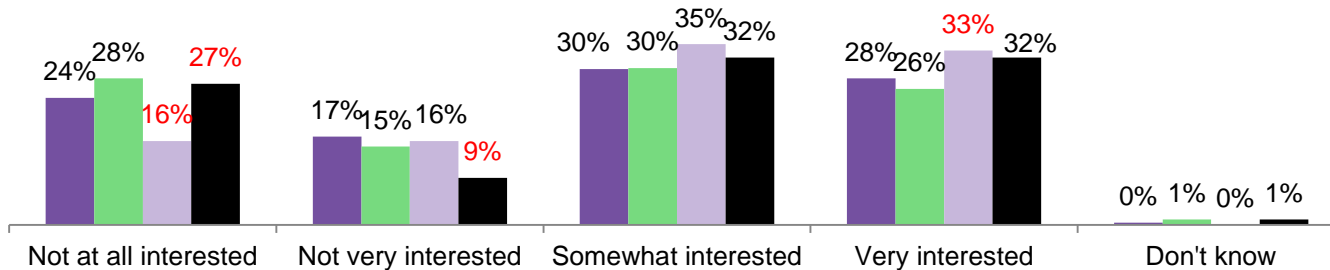
Change as a Result of Report

n=201



Interest in Receiving Comparative Report

2012 (n=527) 2013 (n=431) 2014 (n=324) 2015 (n=257)



- Q13. Are you aware that Rocky Mountain Power provides a report that compares your electrical usage to your neighbor's usage?
- Q14. Has your household received this Rocky Mountain Power report that compares your electrical usage to your neighbor's usage?
- Q15. Have you changed any way that your household uses electricity as a result of receiving this report?
- Q16. How interested would you be in receiving these reports?

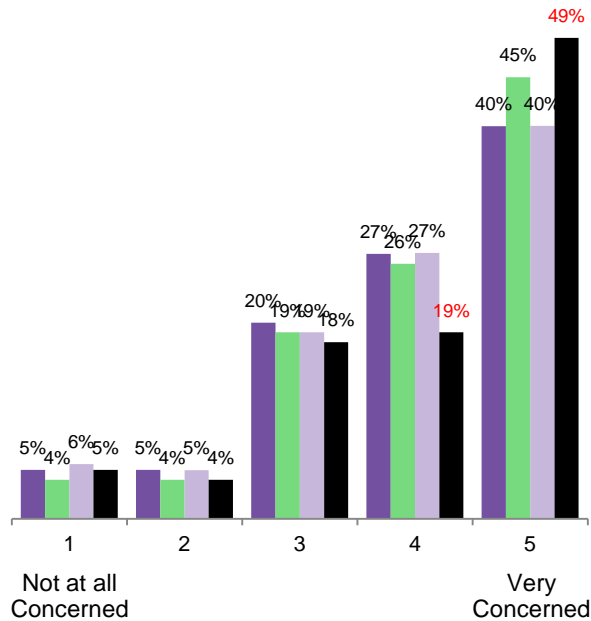
Red indicates significantly different than previous year

Utility Company Perceptions

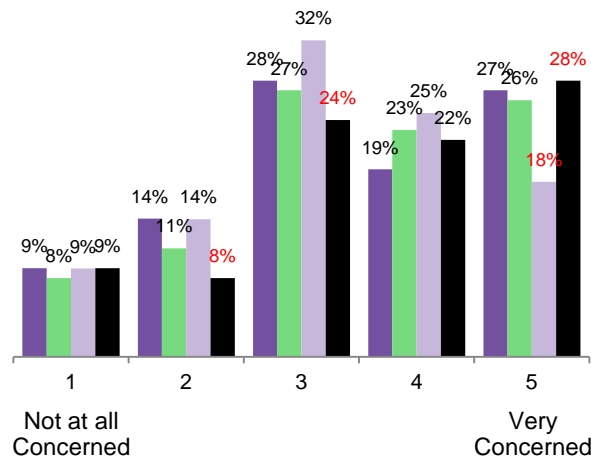
Customers viewing Rocky Mountain Power as very concerned with conserving energy, keeping rates low, and helping customers save money have increased significantly since 2014.

How concerned is Rocky Mountain Power with...?

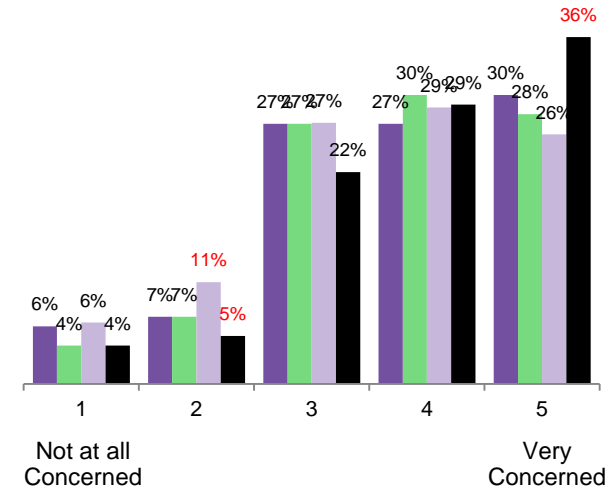
■ 2012 (n=576)
 ■ 2013 (n=613)
 ■ 2014 (n=502)
 ■ 2015 (n=500)



...conserving energy



...keeping rates as low as possible



...helping customers save money

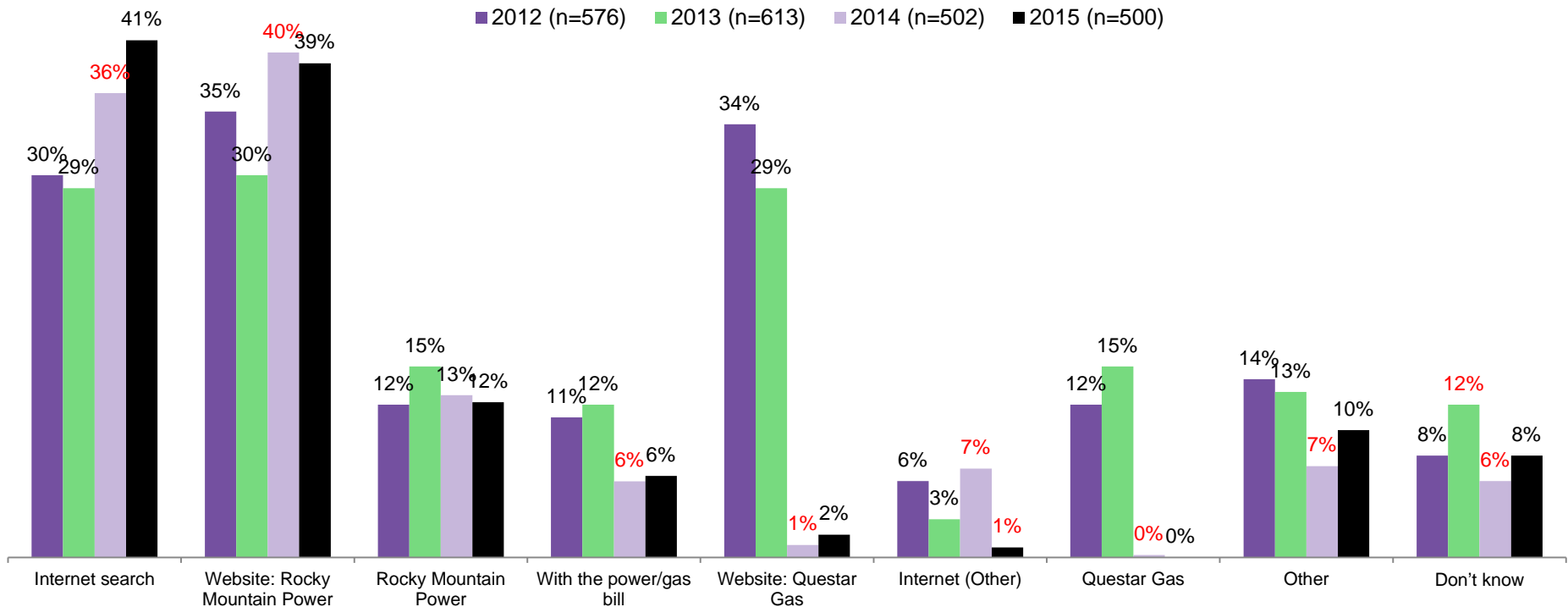
Q26. From what you know or have heard, how concerned is Rocky Mountain Power about conserving energy?
 Q27. How concerned do you think Rocky Mountain Power is about finding ways to keep their rates as low as possible?
 Q28. How concerned do you think Rocky Mountain Power is about helping customers save money through saving energy?
 Utah DSM Survey

Red indicates significantly different than previous year

Communication

Customers are very likely to go online to find more information, most commonly doing a general internet search or looking at the Rocky Mountain Power website.

Where to Look for More Information



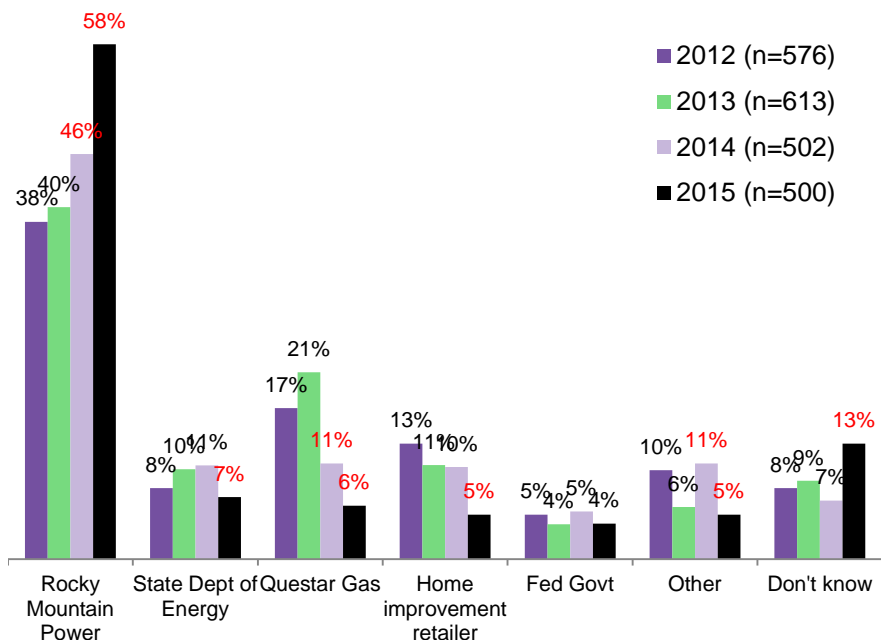
Note: Removal of Questar from survey in 2014 may have affected data.

Q29. Now, if you wanted to know more about energy efficiency and home energy savings, rebates and/or products, where would you look for information?

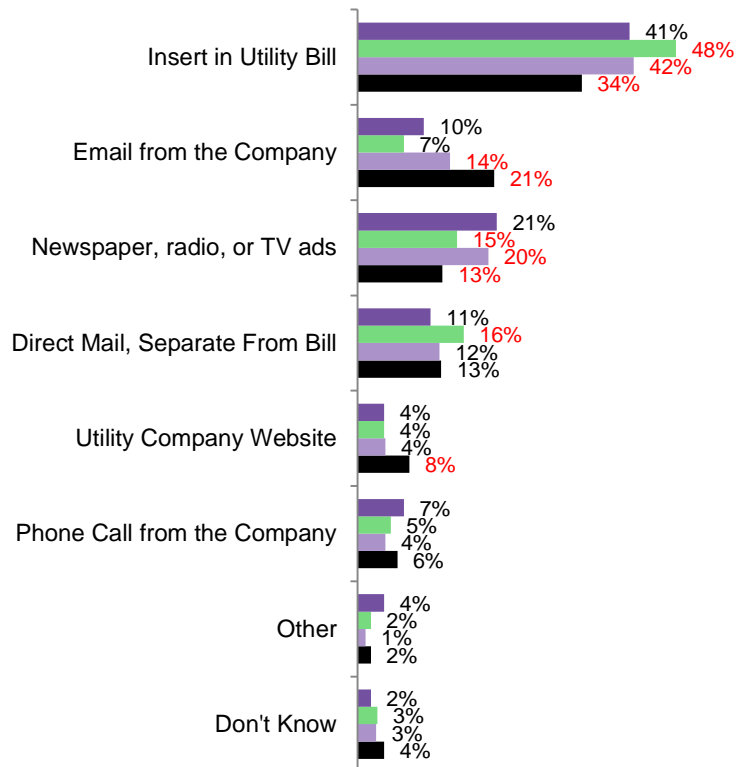
Sources of Information

Customers are far more likely to turn to Rocky Mountain Power first for energy efficiency information, before any other information source. Likelihood to turn to the Rocky Mountain Power site first has increased compared since last year.

Where Customers Turn to First for Information



Most Effective Ways to Communicate



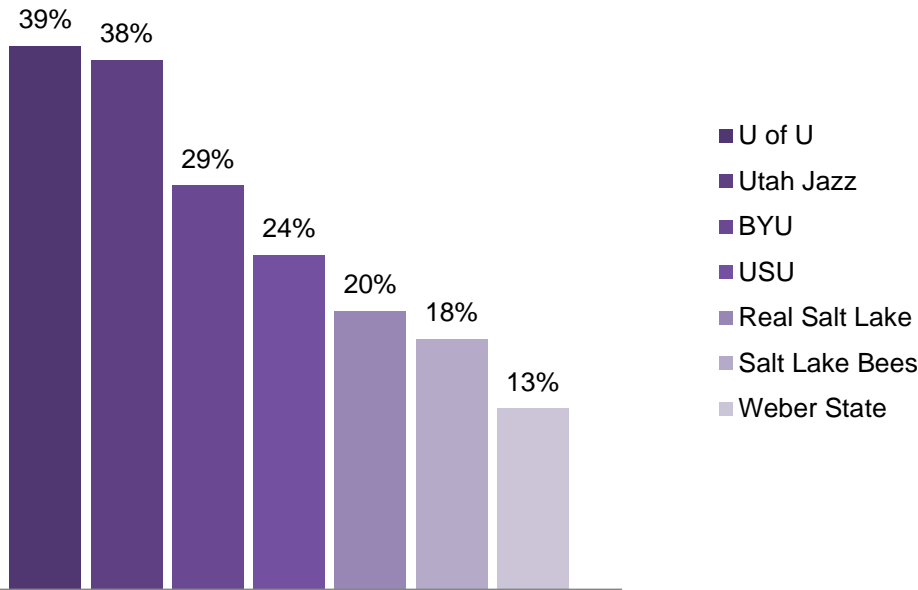
Q30. Which of the following would you most likely turn to first for energy-efficiency information?

Q31. 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?

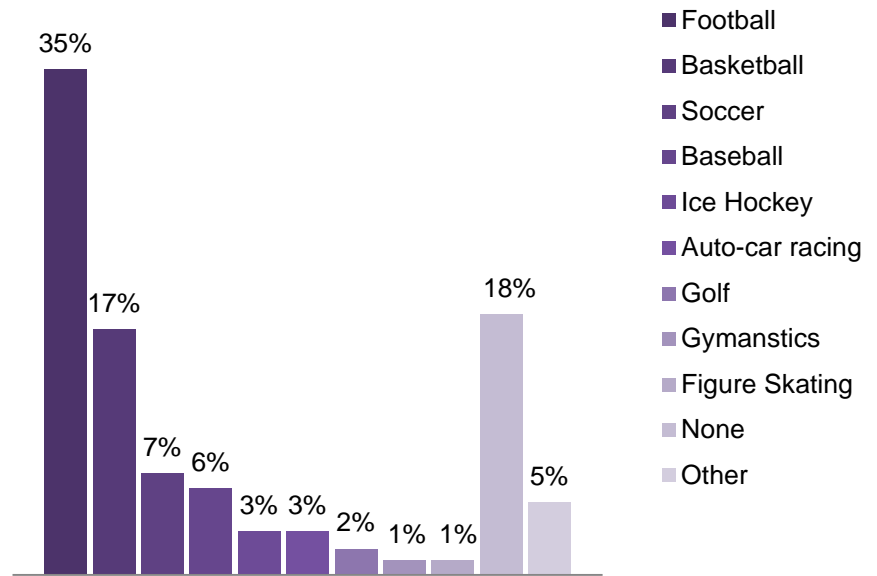
Sports Fan Behavior

The University of Utah Utes are the most followed sports team in the state of Utah, closely followed by the Utah Jazz. Football is the favorite sport to attend, listen to, or watch by a large margin.

Teams Followed by Customers (n=500)



Sports Followed by Customers (n=500)



Q32-Q38. Do you follow any of these sports teams by attending their games, listening to their games on the radio or watching their games on TV?

Q39. What is your favorite sport to attend in person, listen to on the radio or watch on TV?