



# Rocky Mountain Power Energy Efficiency Study

October 1, 2013

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# Research Objectives

The Joint Energy Efficiency Study is an ongoing research project sponsored by Questar and Rocky Mountain Power in the Utah area. The following research objectives are addressed in the 2013 wave of the study.

## 1. Customer Behavior:

- What actions do customers take to conserve energy? (Q6-19)
- What motivates these behaviors? (Q20-28)
- Likelihood of customers implementing energy conservation measures in the next year? (Q29-42)

## 2. Customer Awareness

- Awareness of specific programs offered by RMP / Questar (Q43-57)
- Awareness / Likelihood of participating in the Home Energy Plan (Q103-104)
- Awareness / Interest in online home energy assessment tool (Q105)

## 3. Customer Perceptions / Communication:

- Perception of utilities companies' interest in energy conservation and rates (Q106-111)
- Where do customers look for information about energy conservation? (Q112-126)
- Where do customers first hear about energy-conservation programs? (Q88-102)
- What are the best methods for communicating with customers? (Q128)
- What are customer perceptions of the importance of utility companies offering energy-conservation programs? (Q4-5)

## 4. What energy conservation measures should be implemented?

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

“\*” = Difference is statistically significant at the 95% level.

Note: In this report, the sample size is n=613, unless otherwise noted on specific charts;

# Executive Summary

## 1. Behavior

Customers are most likely to save energy by adjusting the thermostat, using energy efficient light bulbs or adding insulation. The majority also turn off lights when leaving a room. Saving money was cited as the main reason to conserve energy. In 2013, fewer customers said they took an action to conserve energy during the past year.

## 2. Awareness

General awareness of Rocky Mountain Power energy efficiency programs declined as did specific awareness of Home Energy Savings, Cool Keeper and Time of Day. Awareness of wattsmart, including wattsmart New Homes, increased in 2013.

## 4. Communication

TV advertisements and utility bill inserts are mentioned as the primary channels for first learning about energy efficiency programs. Rocky Mountain Power is an importance source of energy efficiency information. Additionally, the Internet remains the go-to source of information for customers.

## 5. Perceptions

Based on this year's response, customers continue to think Rocky Mountain Power is more concerned with conserving energy than with keeping rates low or helping customers save money. Interest in a free online energy assessment and an in-home energy plan declined this year.

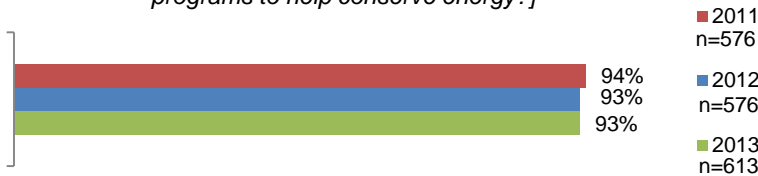
# Key Findings

# Key Findings

Customers continue to believe it is *somewhat* or *very important* for Rocky Mountain Power to offer energy conservation programs. Over half (54%) have taken steps to save energy in their home during the past year.

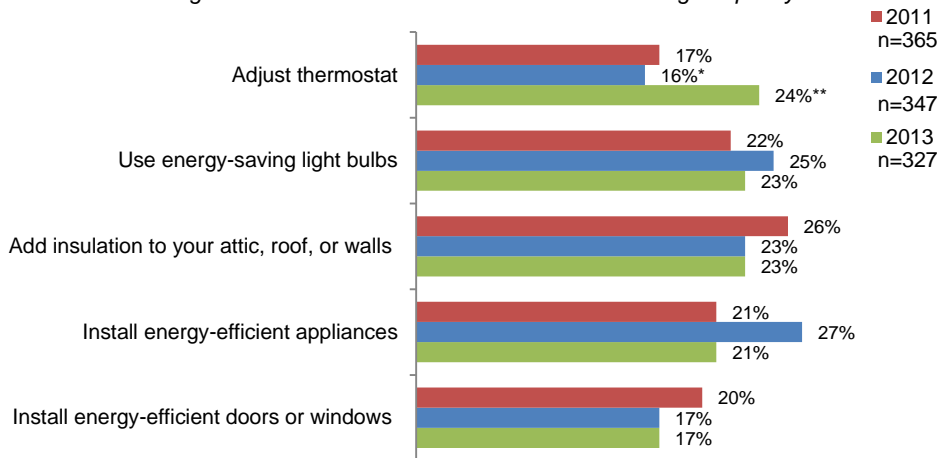
Ninety-three percent of Rocky Mountain Power customers feel it is *Very Important* or *Somewhat Important* for utility companies to offer energy conservation programs.

[Q4. How important is it for utility companies to offer customers programs to help conserve energy?]



## Top 5 Actions Taken to Save Energy

[Q6-Q19. What actions have you taken in your home in order to save energy? Percentages based on those who have taken action during the past year.]

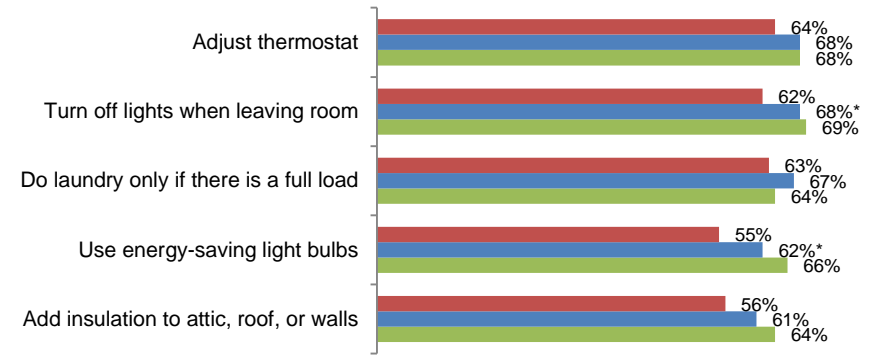


\* Significantly different from 2011  
\*\* Significantly different from 2012

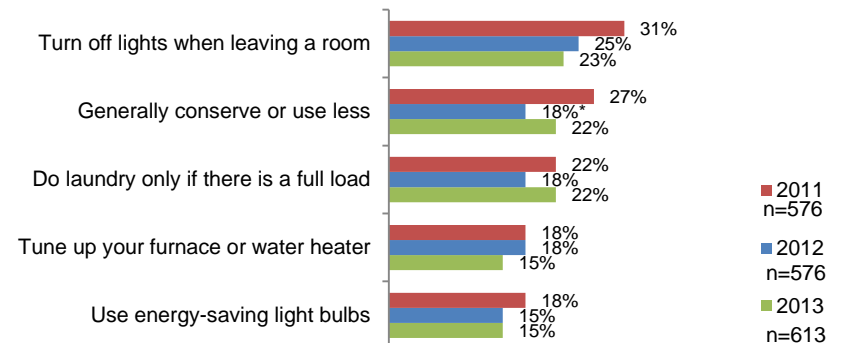
## Top Five in each category (*already do, very likely to do*)

[Q29-Q42. For each program, 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.]

### Already do / done



### Very likely to do in the next year



# Key Findings

Since 2010, the percentage of customers aware of energy-saving programs has decreased significantly.

## Energy-Saving Program Awareness

[Q43. Are you aware of any programs offered by Rocky Mountain Power or Questar Gas to help you save energy or lower your utility bills?]



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

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

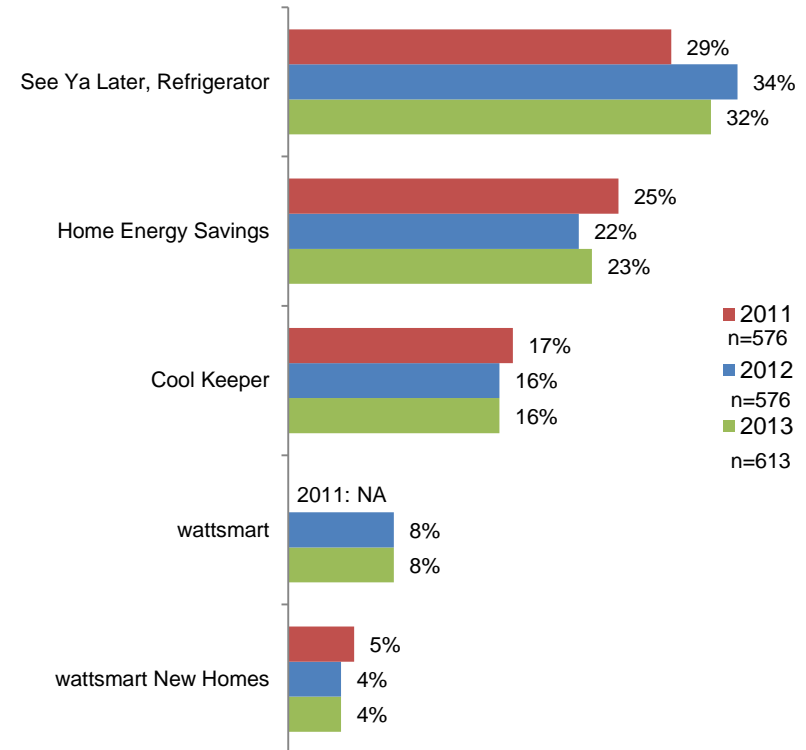
[Q44. What is it that these programs ask people to do? (UNAIDED) If yes on Q43.]

- |                    | 2011--2013         |
|--------------------|--------------------|
| • Conserve Energy: | (11%, 35%*, 23%**) |
| • Insulate:        | (11%, 22%*, 20%)   |
| • Cool Keeper:     | (27%, 20%, 15%)    |

n=324

## Current and Past Participants

[Q77-87. For each program, let me know if you were aware of it before this call. And, if so, if you have ever participated in the program?]



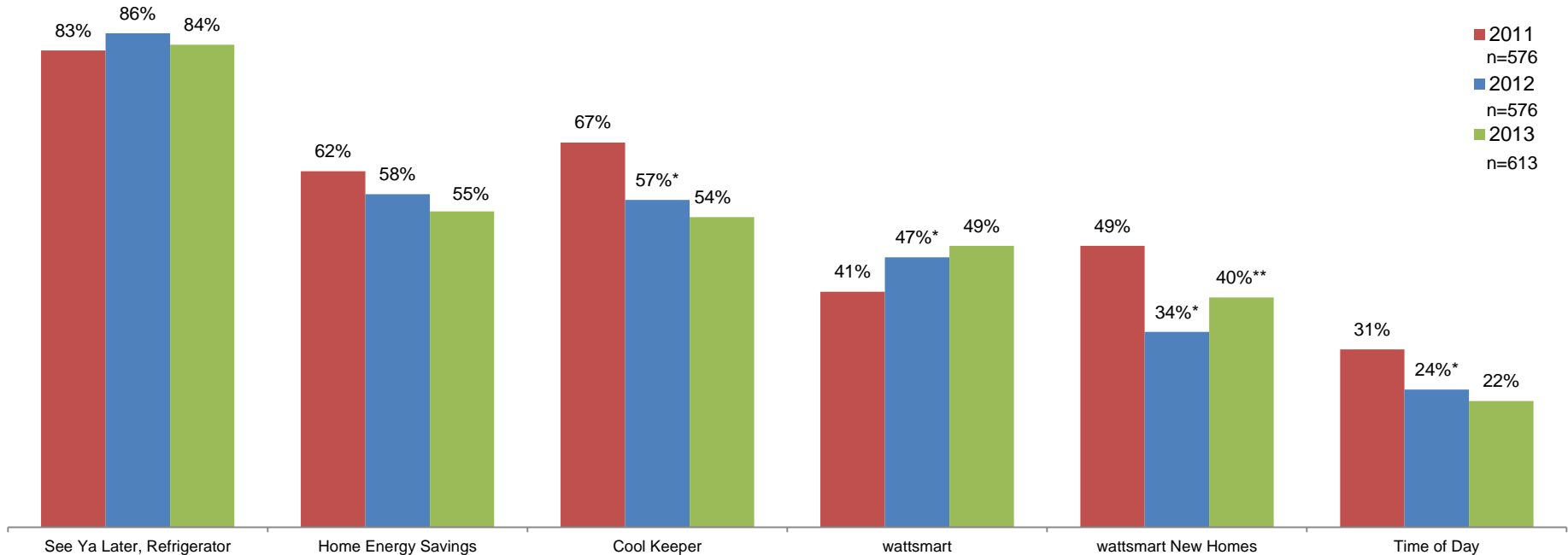
\* Significantly different from 2011  
 \*\* Significantly different from 2012

# Key Findings

Overall program awareness remained fairly stable from 2012 to 2013, although awareness of wattsmart New Homes significantly increased. The overall trend since 2011 has been lower awareness for Home Energy Savings, Cool Keeper and Time of Day. Awareness of the wattsmart program has increased since 2011.

## Total Awareness of Energy Programs

(Sum of 1. A current participant, 2. A past participant, and 3. Aware of but never participated)  
 [Q77-87. For each program, let me know if you were aware of it before this call. And, if so, if you have ever participated in the program?]



\* Significantly different from 2011  
 \*\* Significantly different from 2012

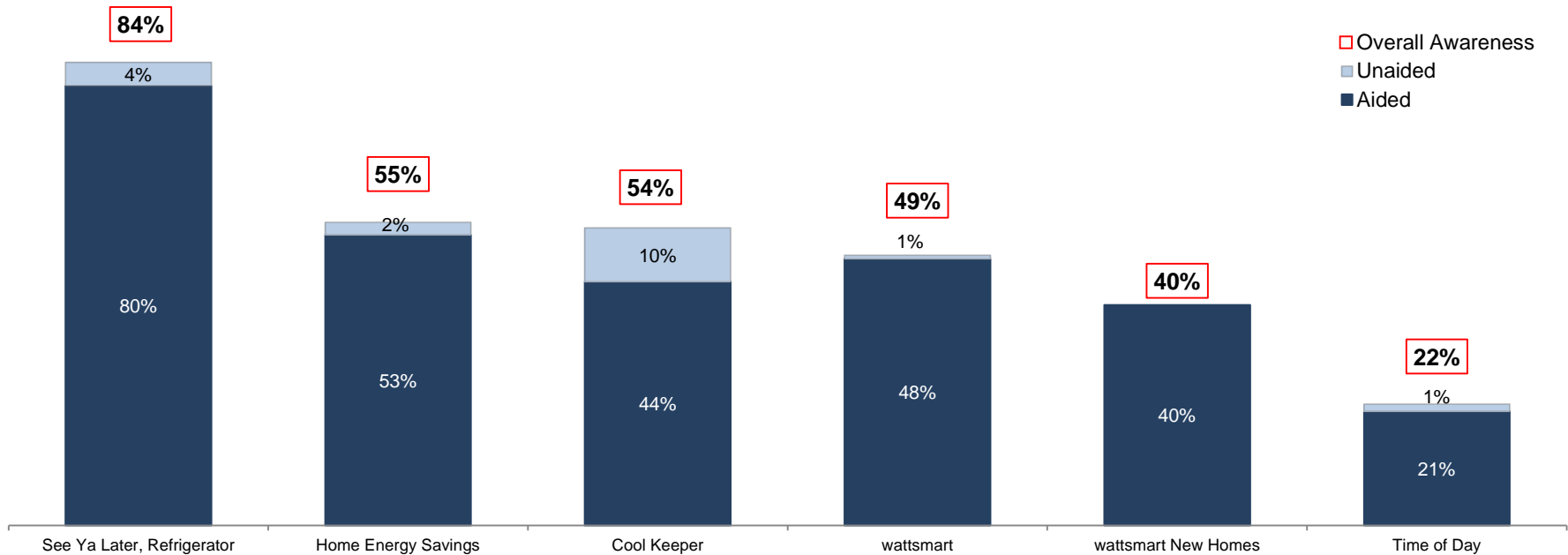
# Key Findings

Breaking down unaided versus aided program awareness, Cool Keeper and See Ya Later, Refrigerator received the strongest unaided recall.

## Overall Awareness of Rocky Mountain Power Energy-Efficiency Programs (2013: Overall Awareness)

[Q45-Q58. What energy efficiency or conservation programs are you aware of from Rocky Mountain Power? (UNAIDED)]\*

[Q77-87. For each program, let me know if you were aware of it before this call. And, if so, if you have ever participated in the program? (AIDED)]\*\*



\*\*Overall awareness is the sum of 1. A current participant 2. A past participant 3. Aware of, but never participated.

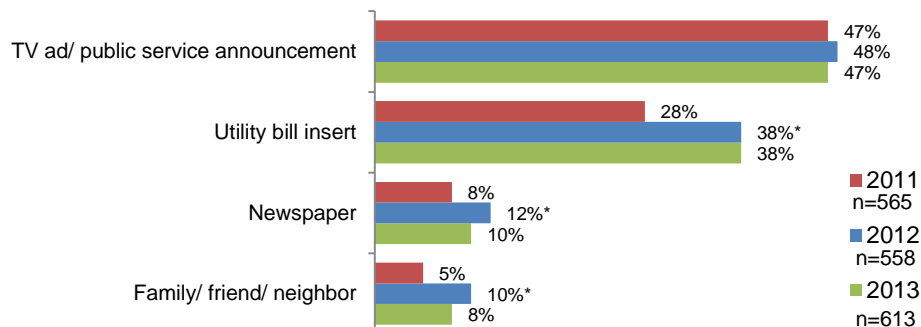


# Key Findings

Customers are most likely to first hear about Rocky Mountain Power's energy efficiency programs via *TV or Utility Bill Inserts*. In addition, interest in a free online energy assessment has decreased substantially.

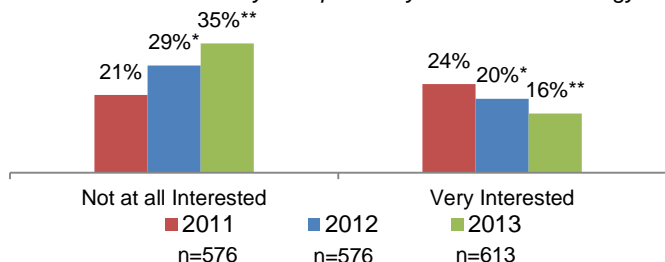
## First heard about these programs from...

[Q88-Q102. Where did you first see or hear about these energy savings programs? (UNAIDED)]



## Interest in Free Online Energy Assessment

Q105. 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?



Since 2011, interest for a free online tool to perform a home energy assessment has significantly decreased.

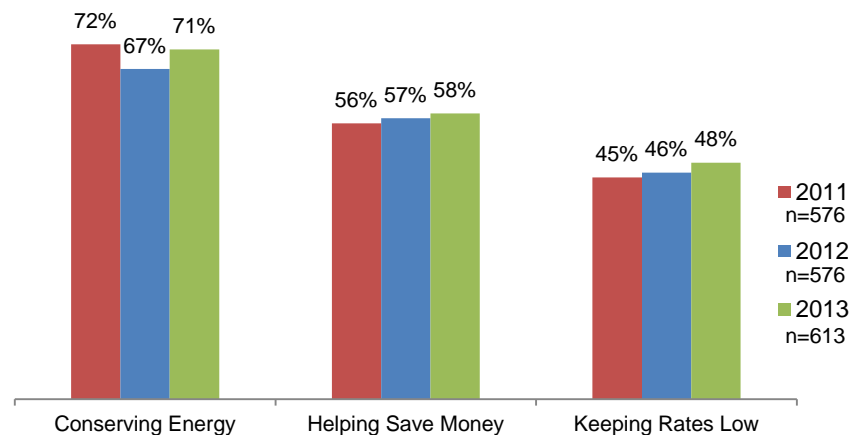
\* Significantly different from 2011  
 \*\* Significantly different from 2012

As in previous years, customers feel that Rocky Mountain Power is more concerned about *conserving energy* than about *helping customers save money* or *keeping rates low*.

Opinions about Rocky Mountain Power's efforts to conserve energy, help customers save money and to keep rates low have remained stable.

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

[Q106, 108, 110. From what you know or have heard, how concerned is Rocky Mountain Power about...?]



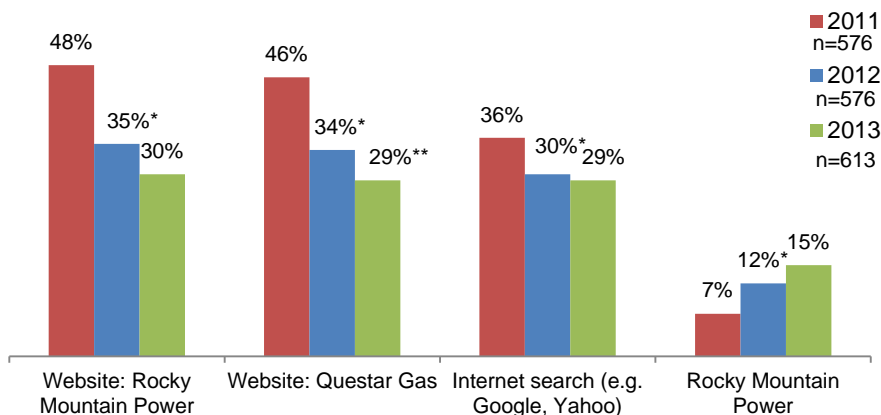
# Key Findings

The Rocky Mountain Power website remains the preferred source for energy efficiency information. Utility bill inserts, direct mail from the utility, and newspaper/TV/radio ads are perceived to be the most effective means for communication.

Respondents said they would most likely turn to the Rocky Mountain Power and Questar Gas websites, as well as general Internet searches, for energy efficiency information.

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

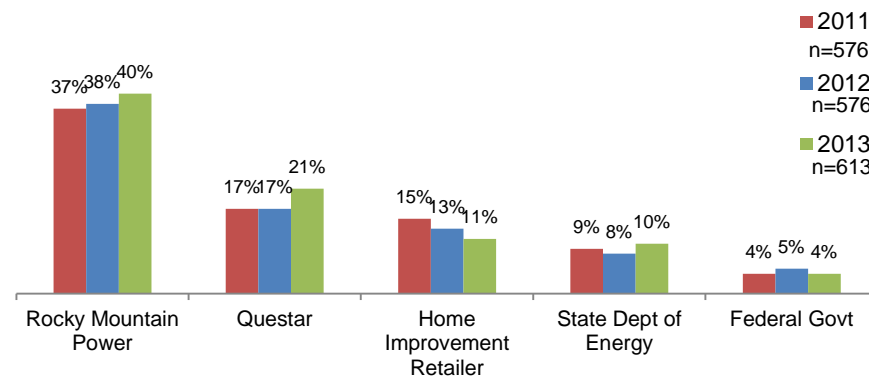
[Q112-Q126. If you wanted to know more about energy efficiency and home energy savings, rebates and/or products, where would you look for information? (UNAIDED)]\*



\* Significantly different from 2011  
 \*\* Significantly different from 2012

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

[Q127. Which one of the following would you most likely turn to first for energy efficiency information?]



## Most Effective / Preferred Communication

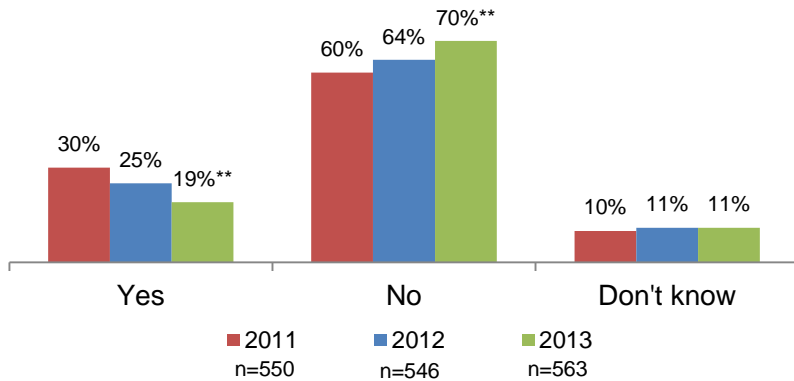
Q128. Which of the following do you think is the most effective way for your utility companies to communicate how to lower energy usage and save money on your utility bills?

- Utility bill insert: 48% (up 7% since 2012)
- Direct mail: 16% (up 5%)
- Newspaper / Radio / TV ad: 15% (down 6%)
- Email from company: 7% (down 3%)

# Key Findings

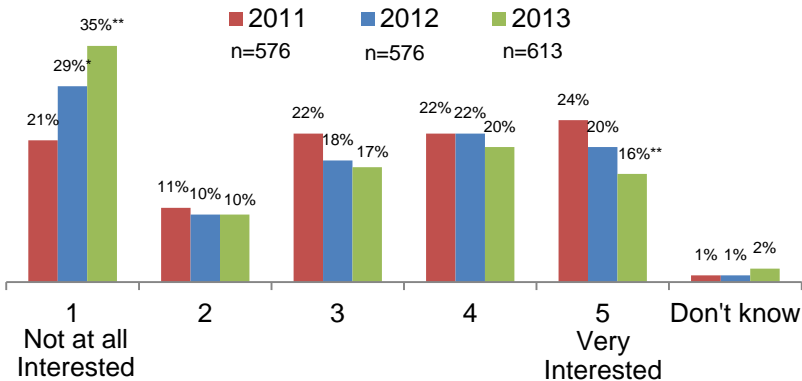
Interest in a home energy plan assessment slipped this year. The most common reasons why customers would not request a home energy plan are an overall lack of interest (15%) and the belief they already are energy efficient (11%).

[Q103. Do you think you or someone in your household might request a home energy plan in the upcoming year?]



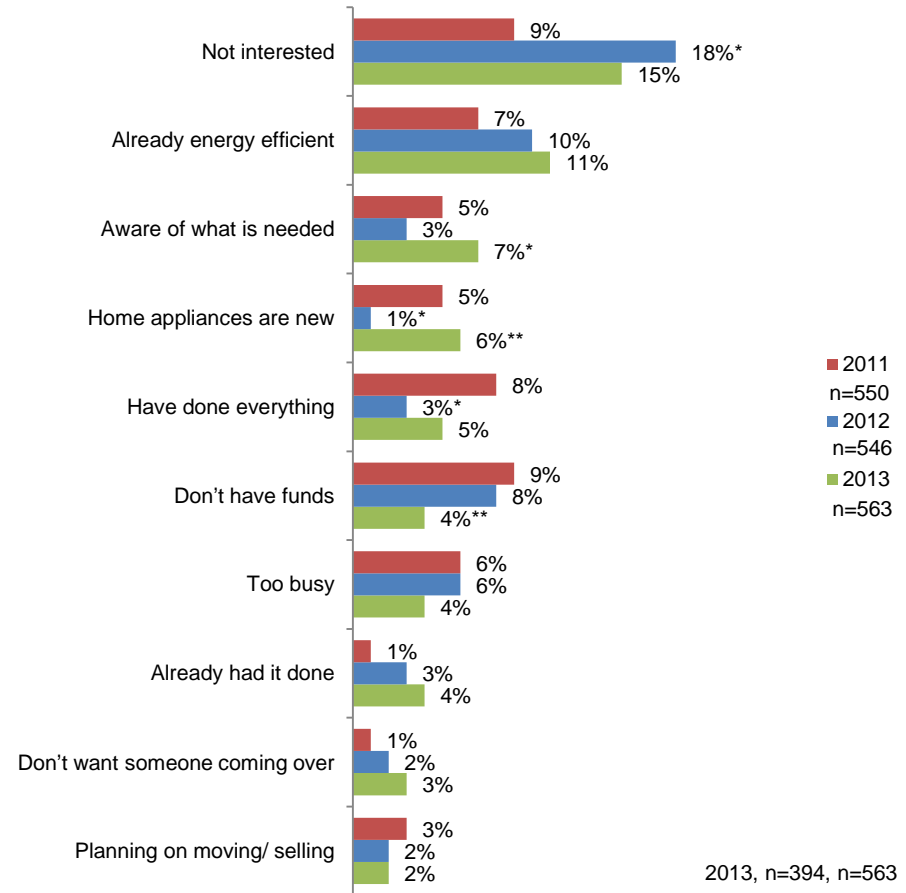
## Interest in Using Free Online Tool

[Q105. 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?]



## Reasons for No Interest

[Q104. Why not? (UNAIDED)]



2013, n=394, n=563

\* Significantly different from 2011  
 \*\* Significantly different from 2012

# 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 addition, customers are far more likely to conserve energy if the action taken does not require a significant financial outlay (i.e. turn off light switch).
- Overall awareness that energy-saving programs are offered decreased slightly in 2013; interest in an online home energy plan also continued to decrease.
- TV advertisements and utility bill inserts are again viewed by customers as the preferred methods for communicating energy-conservation information. However, respondents overwhelmingly turn to the Internet as the number one source for information.

## Recommendations

- Help customers see the value of conserving energy. Emphasize the long-term financial savings opportunities of investments made in energy-conservation programs.
- Interest in home energy assessments is decreasing. Therefore, help customers see the purposes and saving opportunities of these plans.
- Customers primarily turn to the Internet for information. A strong web presence is critical to the communication and building the credibility that is required for customers to invest time and money in conserving programs.
- Build on the past successes of TV and other ad campaigns.

\* Significantly different from 2011

\*\* Significantly different from 2012

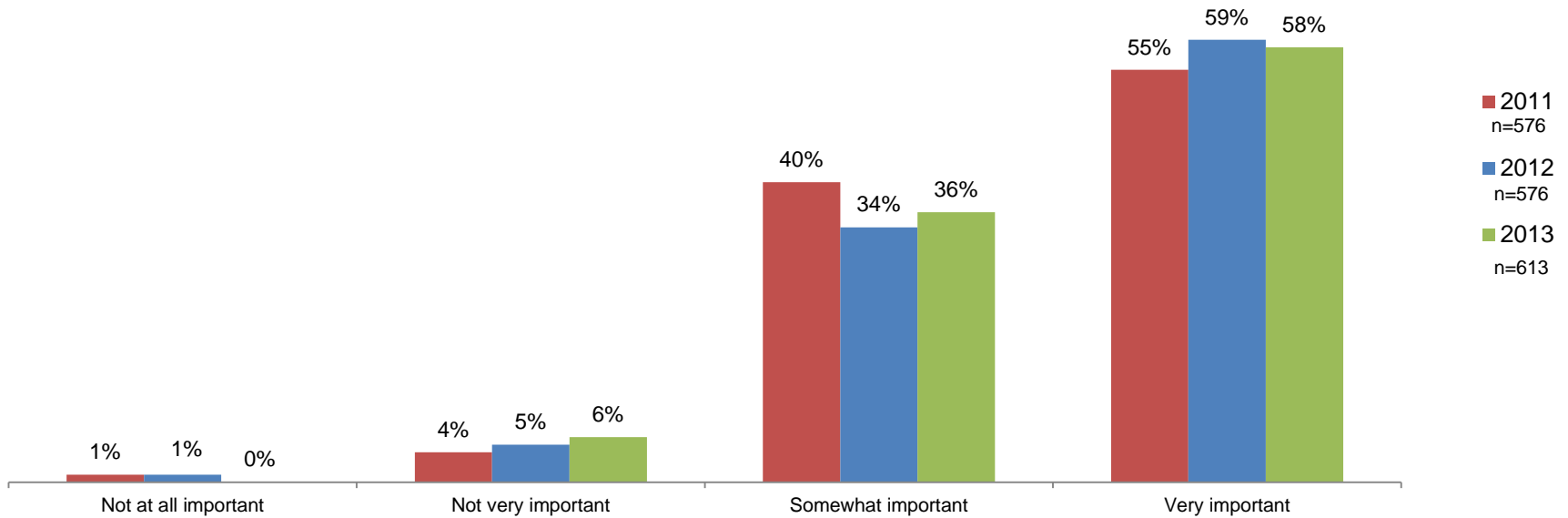
# Illustrated Results and Findings

# General Attitudes

**Ninety-four percent of respondents feel it is *somewhat important* or *very important* for utility companies to offer energy-conservation programs.**

## Importance of Utility Energy-Conservation Program Offering

[Q4. How important is it for utility companies to offer customers programs to help conserve energy?]



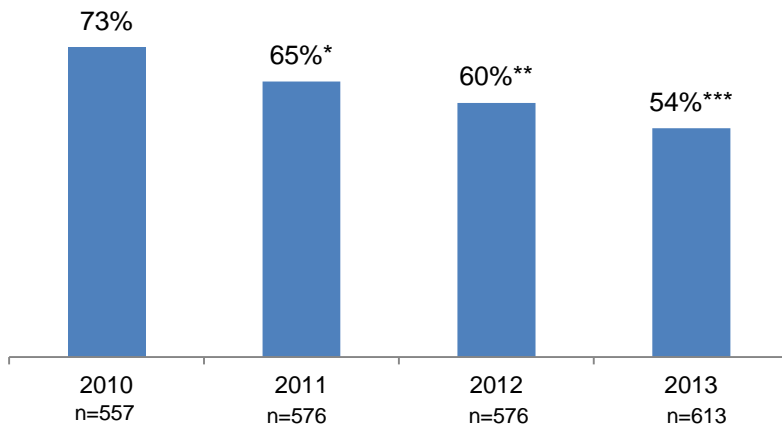
\* Significantly different from 2011  
\*\* Significantly different from 2012

# General Attitudes

Since 2010, the percent of customers who took actions to conserve energy has decreased significantly. In addition, women are more likely than men to adjust the thermostat to save energy.

## Took Action to Conserve Energy (Yes)\*

[Q5. In the past year, have you taken any actions or changed anything in your household to save energy?]



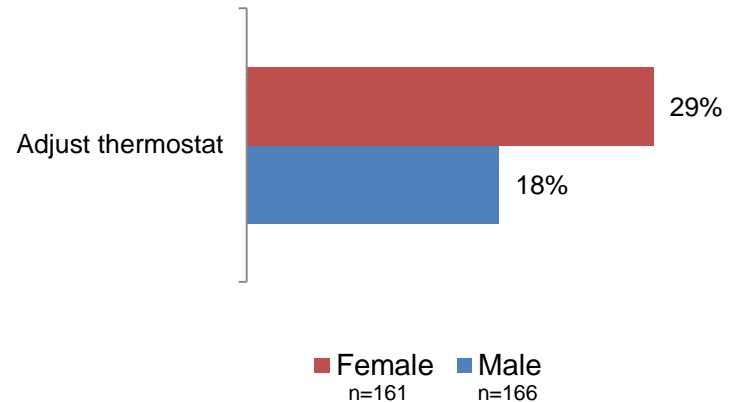
\* Significantly different from 2010  
\*\* Significantly different from 2011  
\*\*\* Significantly different from 2012

## Male vs. Female

Women are significantly more likely than men to adjust the thermostat. Twenty-nine percent of women do so versus 18% of men.

## Actions Taken to Conserve Energy\*

[Male vs. Female]

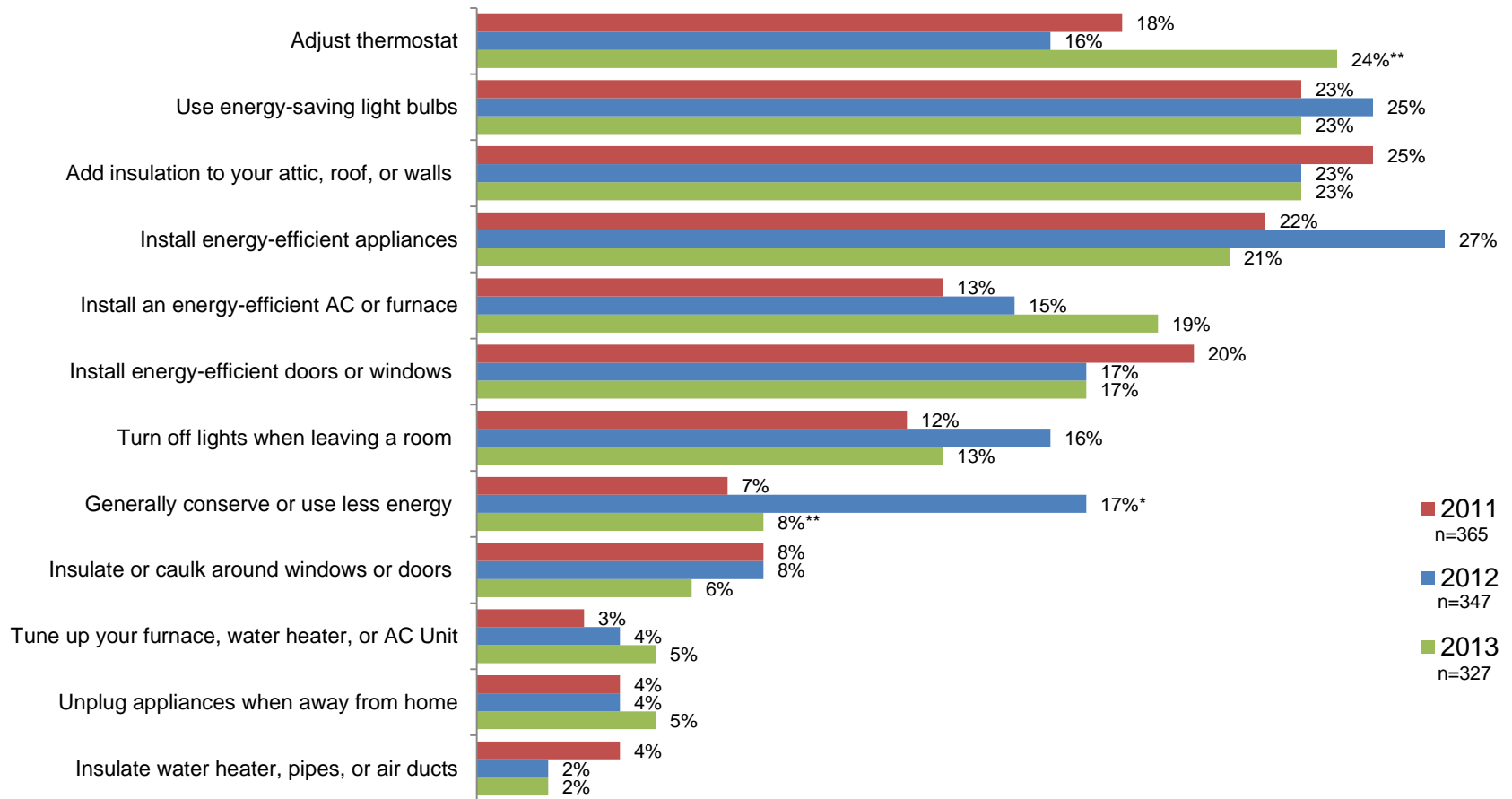


# General Attitudes

The most common actions to save energy include adjusting the thermostat, using energy-saving light bulbs and insulating the home. Thermostat adjustment significantly increased in 2013.

## Actions taken to save energy

[Q6-Q19. What actions have you taken in your home in order to save energy? (UNAIDED) If Yes on Q5.]



\* Significantly different from 2011

\*\* Significantly different from 2012

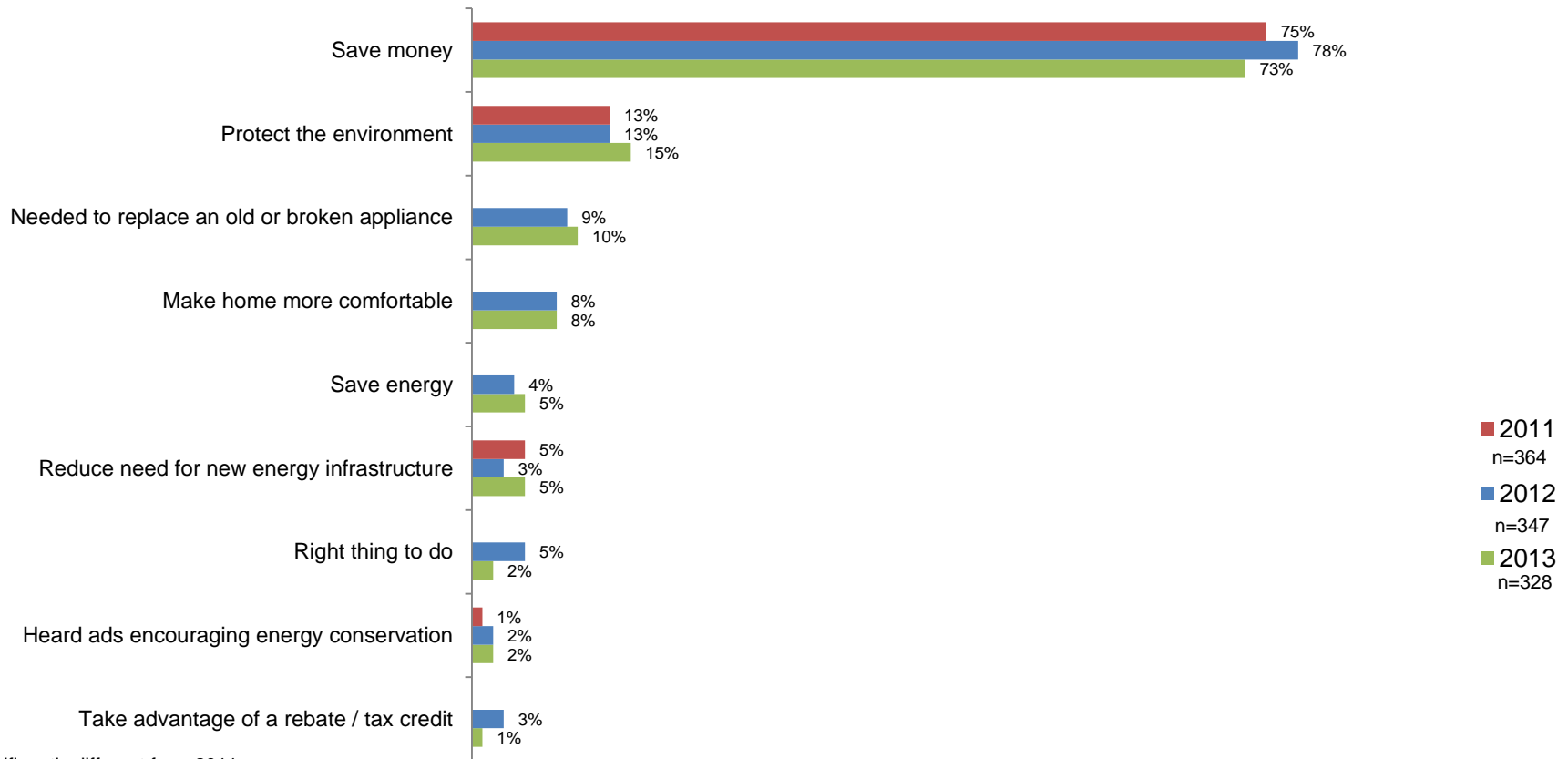


# General Attitudes

**Saving money** remains the top reason why customers chose to conserve energy.

## Main Reason to Conserve Energy

[Q20-Q28. What are the main reasons you took steps to conserve energy in your home? (UNAIDED) If yes on Q5.]



\* Significantly different from 2011  
 \*\* Significantly different from 2012

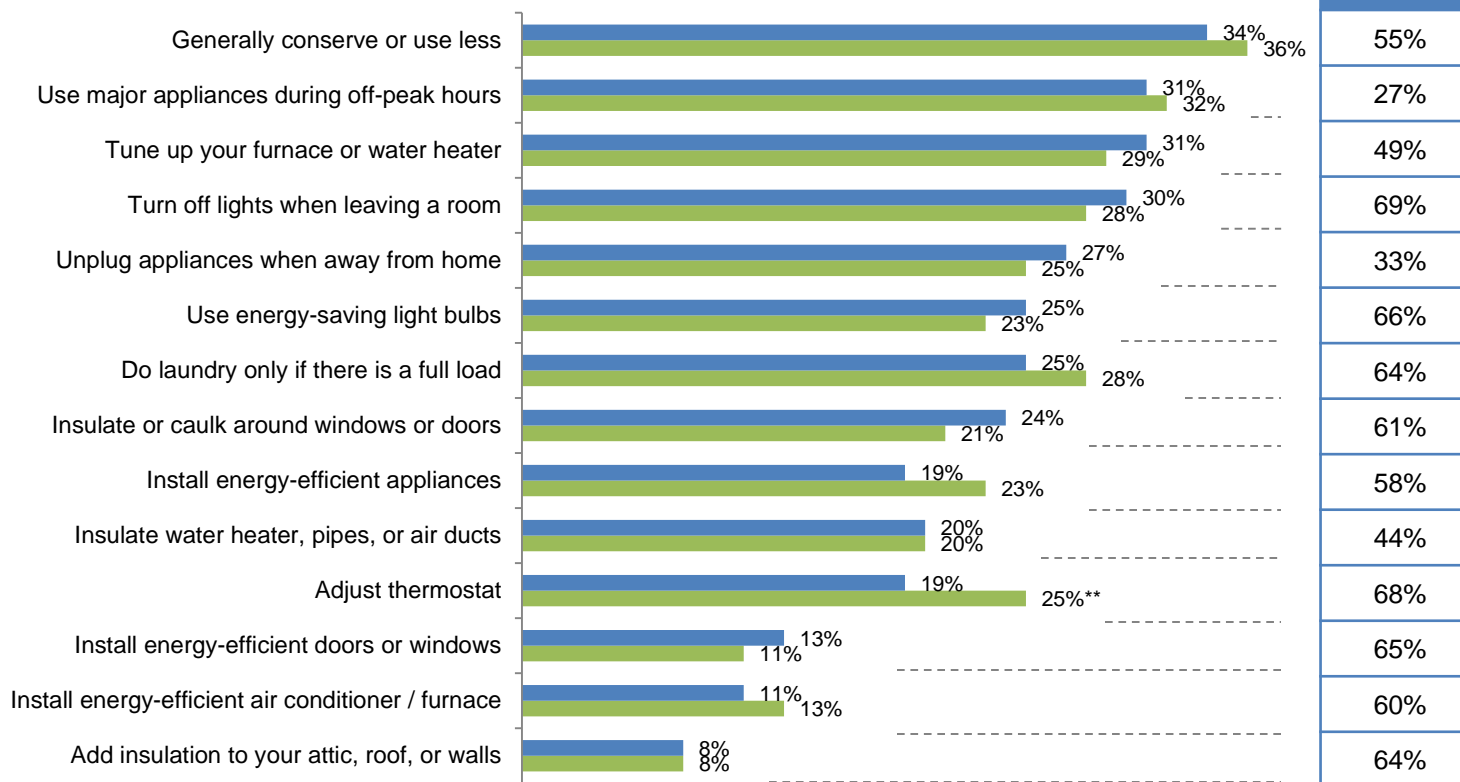
# Likelihood to Use Energy-Saving Measures

Many customers have already taken steps to save energy through behavioral changes (turning off lights, adjusting thermostat) or spending money (insulation, energy efficient light bulbs, doors, windows).

## Likelihood of taking energy-saving measures (Somewhat & Very Likely)

[Q29-Q42. For each program, 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.]

■ 2012  
n=576  
■ 2013  
n=613



\* Significantly different from 2011

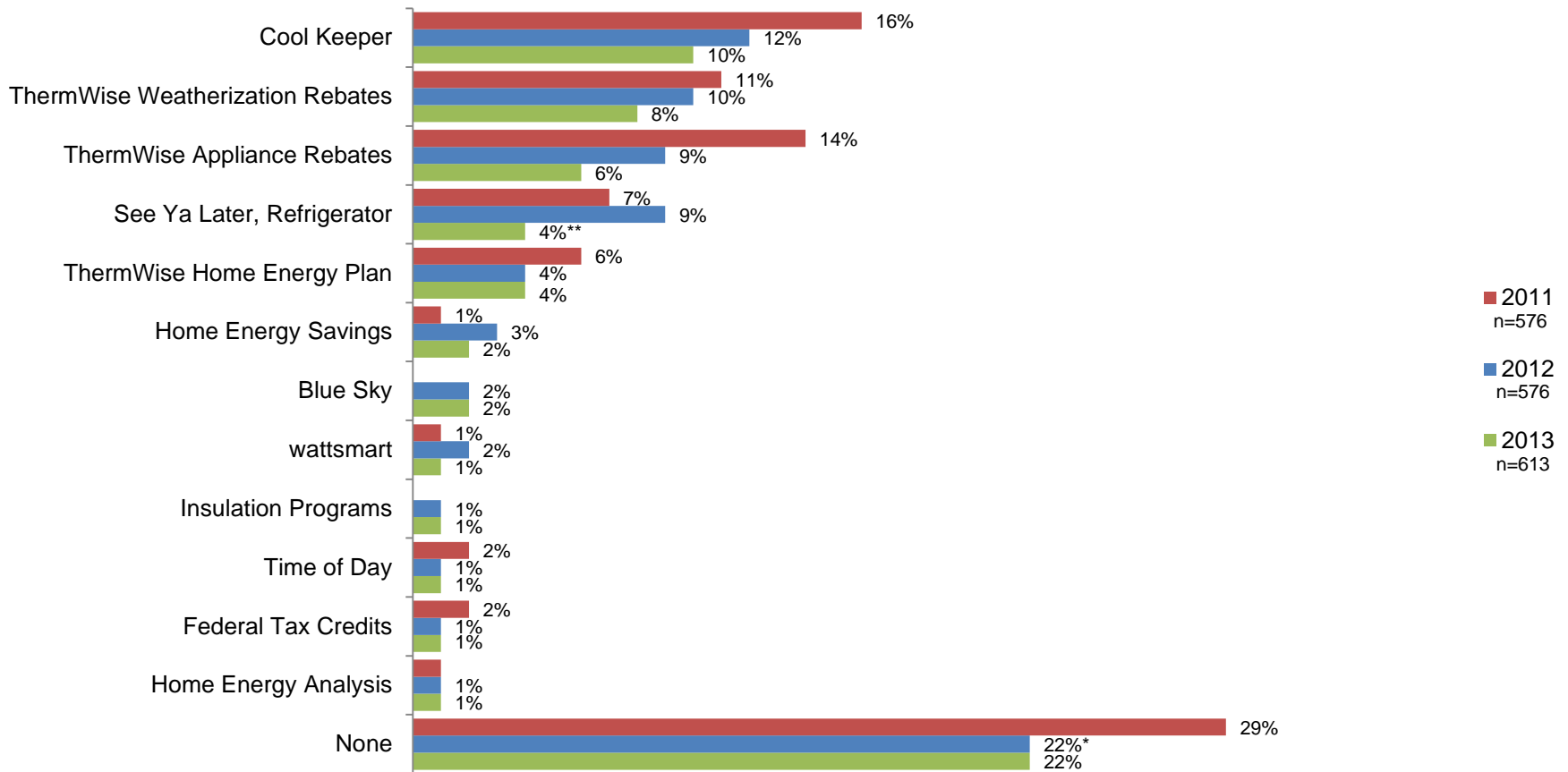
\*\* Significantly different from 2012

# Program Awareness (Unaided)

In 2013, unaided awareness declined for most energy efficiency programs. Customers are most aware of the *Cool Keeper* and *ThermWise Weatherization Rebate* programs.

## What programs are you aware of?

[Q45-Q58. What energy efficiency or conservation programs are you aware of from Rocky Mountain Power or Questar? (UNAIDED)]



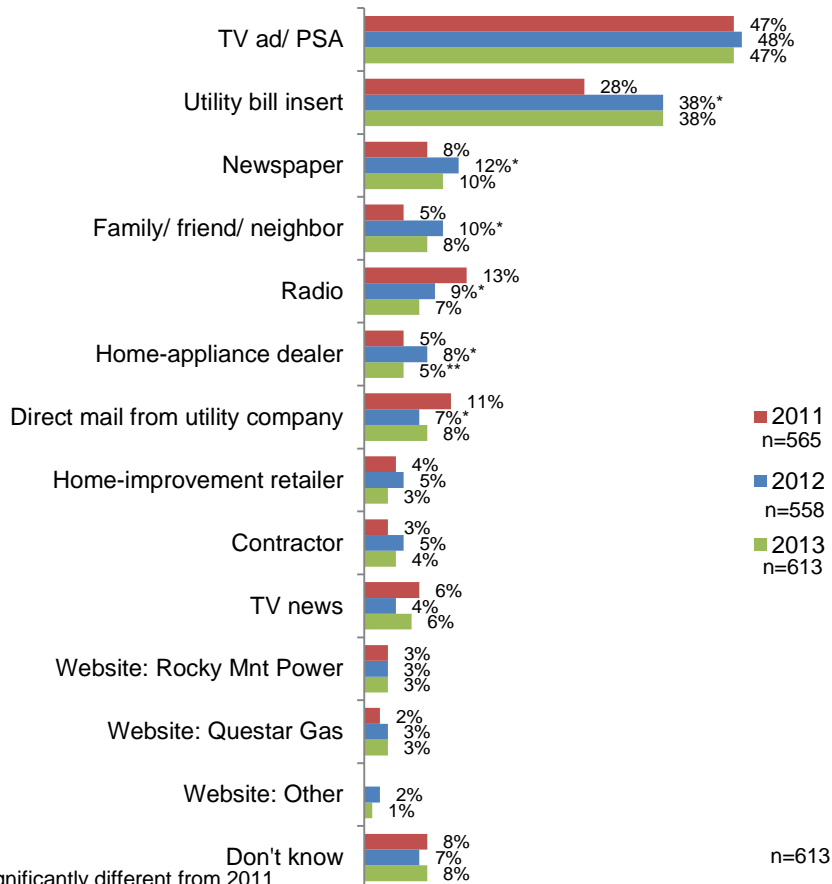
\* Significantly different from 2011  
 \*\* Significantly different from 2012

# Source of Program Awareness

Respondents are most likely to first see/hear about energy-saving programs through *TV advertisements* and *utility bill inserts*.

## Where respondent first saw / heard about programs

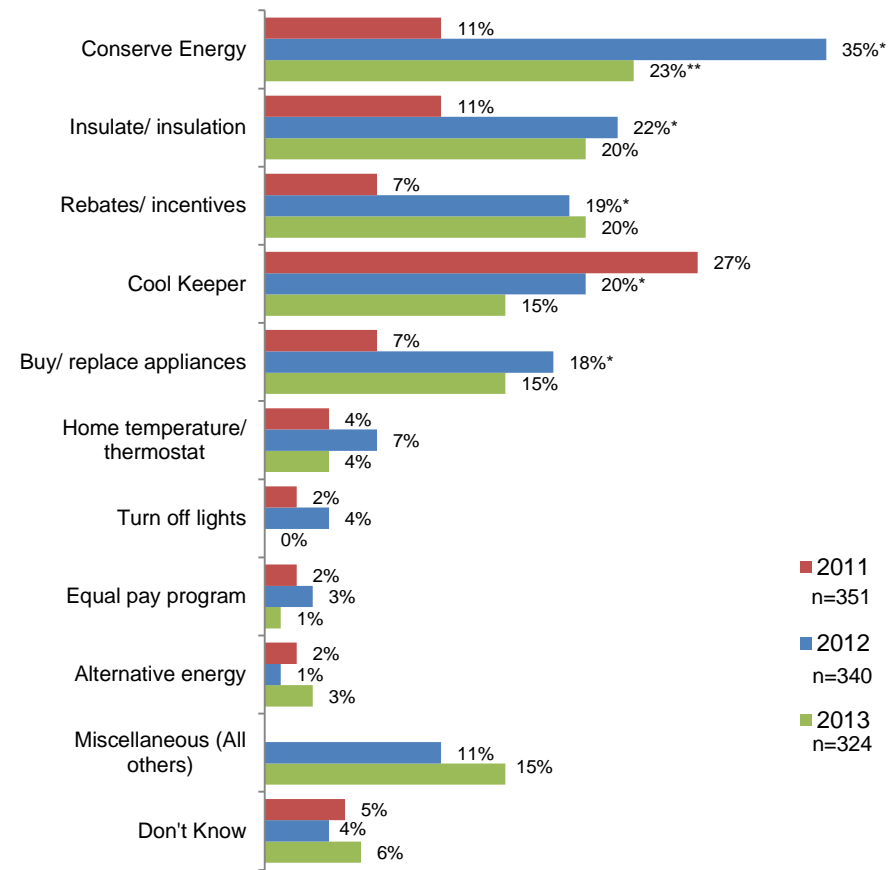
[Q88-Q102. Where did you first see or hear about these energy savings programs? (UNAIDED)]



\* Significantly different from 2011  
 \*\* Significantly different from 2012

## These programs ask you to...

[Q44. What is it that these programs ask people to do? (UNAIDED) If yes on Q43.]



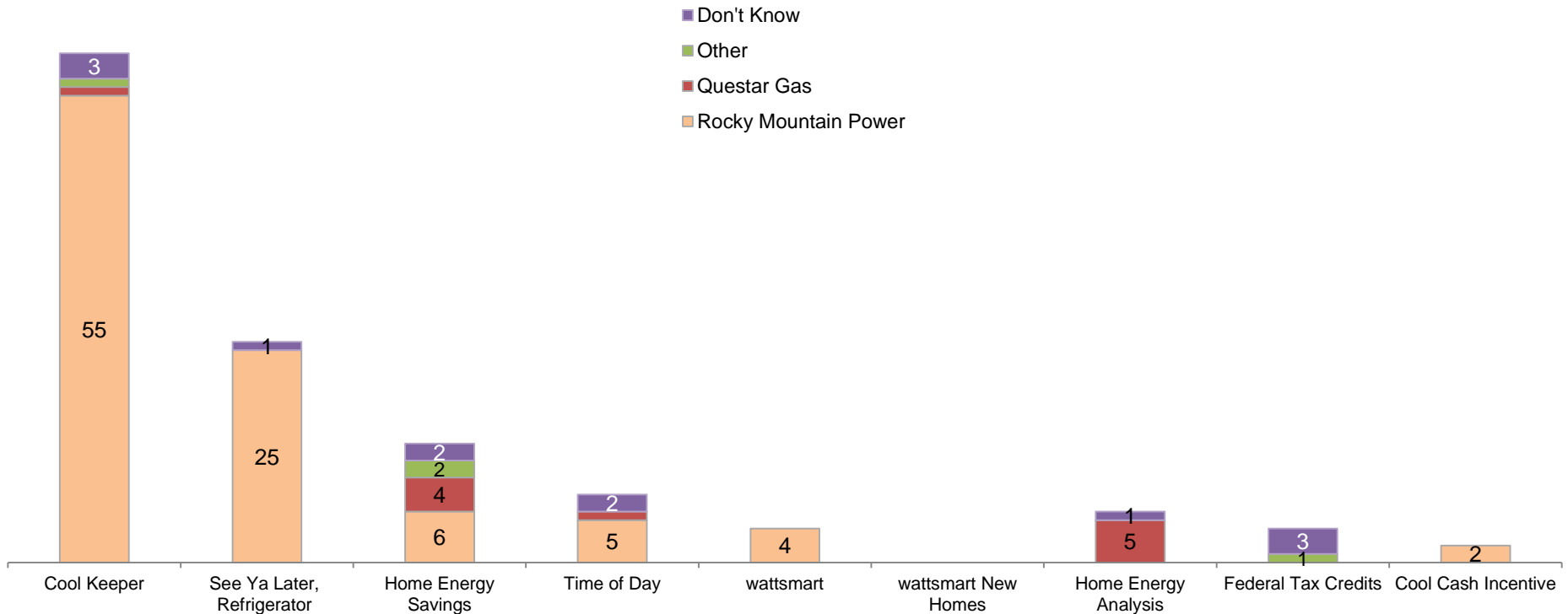
# Program Awareness

The majority of respondents who were asked about *Cool Keeper* and *See Ya Later, Refrigerator* correctly identified those programs with Rocky Mountain Power.

## Is Rocky Mountain Power or Questar Gas the sponsor of...?

(Counts rather than percentages are shown)

[Q59-Q70. From what you know or have heard, is Rocky Mountain Power or Questar Gas the sponsor of... ?]

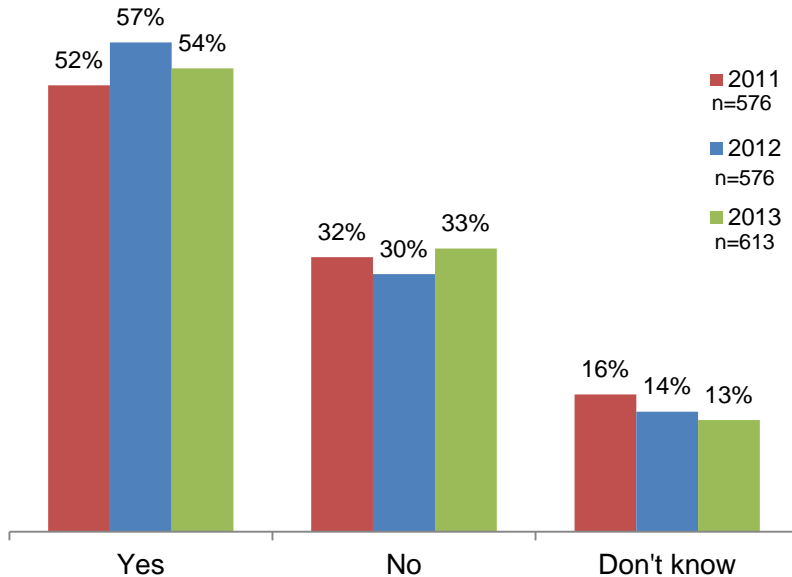


Except for Cool Keeper, small sample sizes makes data comparisons difficult.

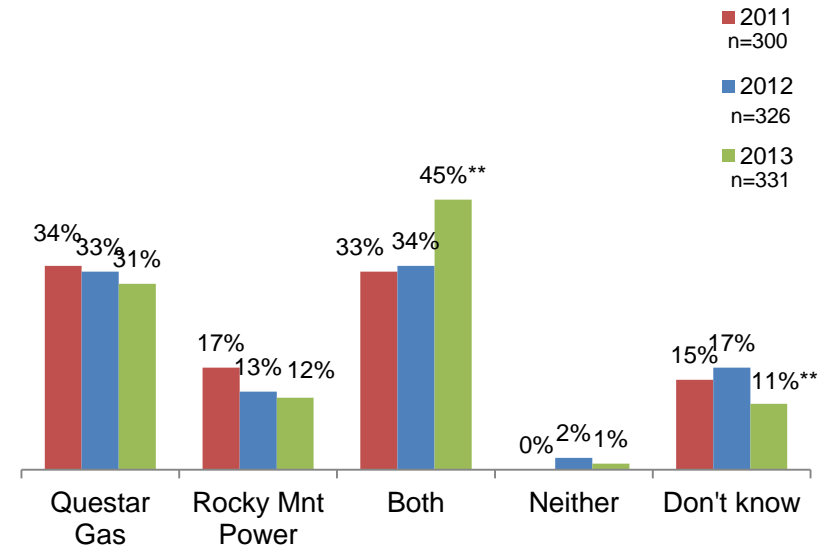
# Home Energy Plan

Over half are aware that Rocky Mountain Power or Questar Gas offer a service where an expert visits the house and assesses energy efficiency. More customers associate the service with Questar Gas than Rocky Mountain Power.

[Q71. Do either Questar Gas or Rocky Mountain Power offer a service where an expert visits your home and assesses your energy efficiency?]



[Q72. Who offers this in-home service?]  
(If Yes to Q71.)



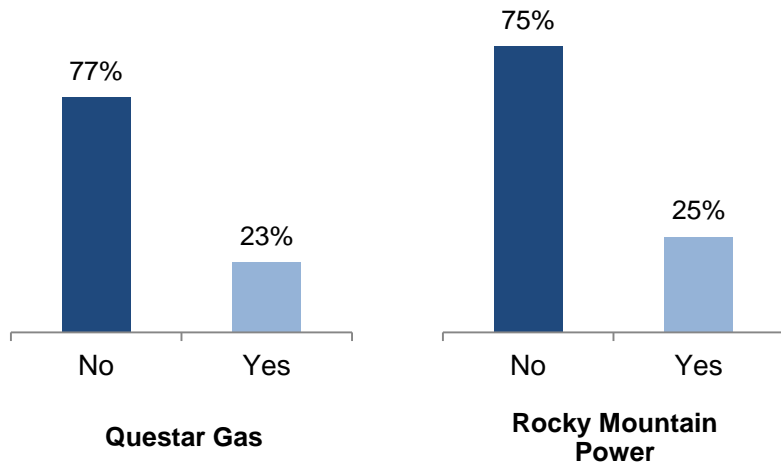
\* Significantly different from 2011  
\*\* Significantly different from 2012

# Home Energy Plan

One-quarter are aware that Rocky Mountain Power provides a report that compares a homeowner's electricity usage to that of their neighbors. Over half said they would be interested in receiving the report.

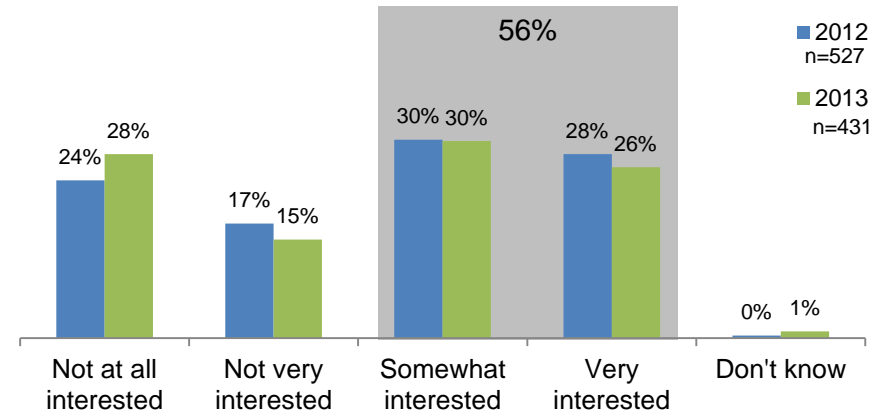
## Awareness of Report that Compares Energy Usage to Neighbors' Usage

[Q73-74. Are you aware that Questar Gas / RMP provides a report that compares your electrical usage to your neighbors?]



## Interest in Receiving Comparative Report

[Q75. How interested would you be in receiving these reports?]



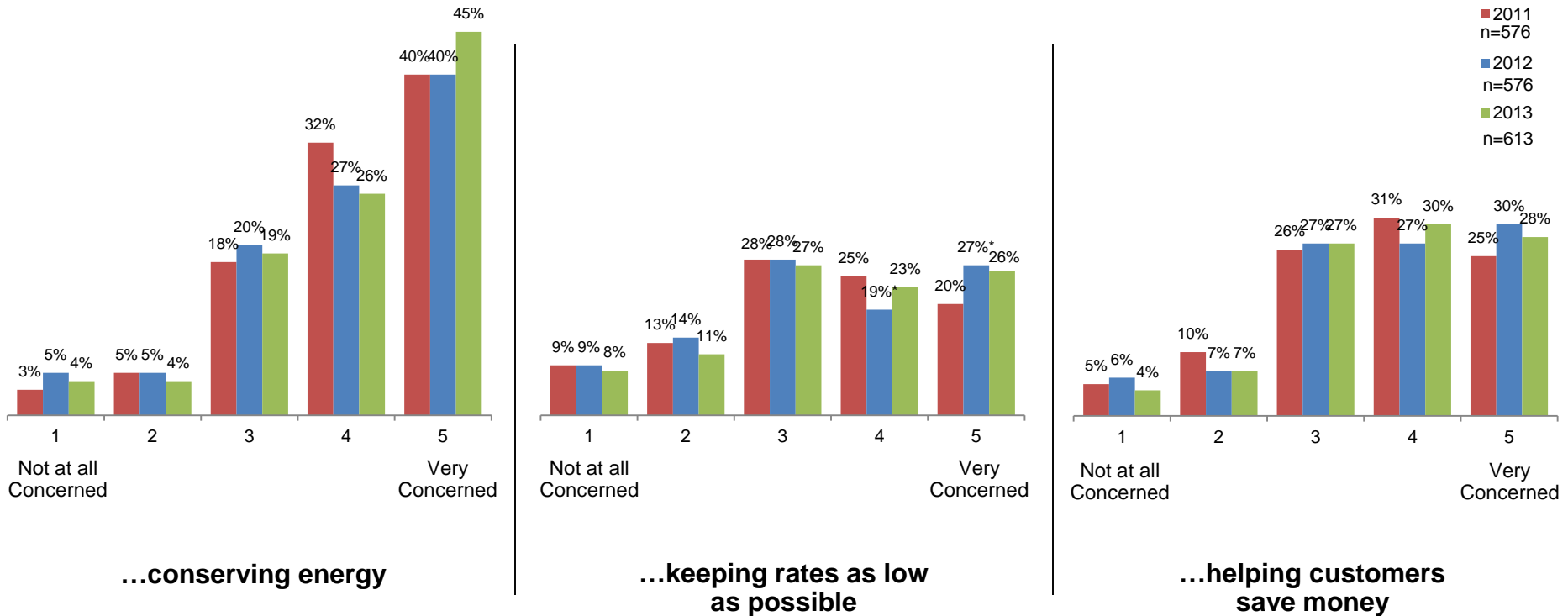
\* Significantly different from 2011  
 \*\* Significantly different from 2012

# Utility Company Perceptions

Customers continue to view Rocky Mountain Power as very concerned with conserving energy but less concerned with keeping rates low and helping customers save money.

## How concerned is Rocky Mountain Power with...?

[Q106,108,110. From what you know or have heard, how concerned is Rocky Mountain Power about...?]



\* Significantly different from 2011  
 \*\* Significantly different from 2012

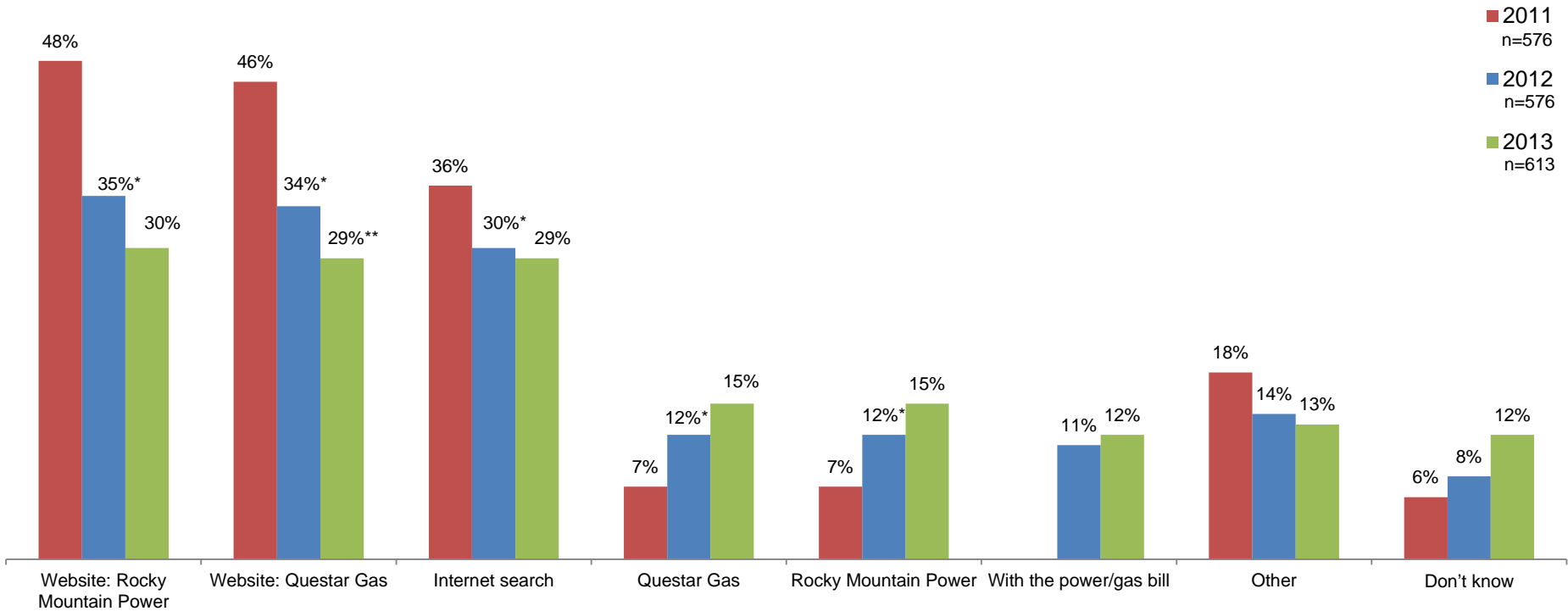


# Communication

Since 2011, fewer customers appear to rely on their electric utility's website for energy efficiency information. However, the utility's website remains a critical source of information, along with general Internet searches.

## Where to Look for More Information

[Q112-Q126. If you wanted to know more about energy efficiency and home energy savings, rebates and/or products, where would you look for information? (UNAIDED)]



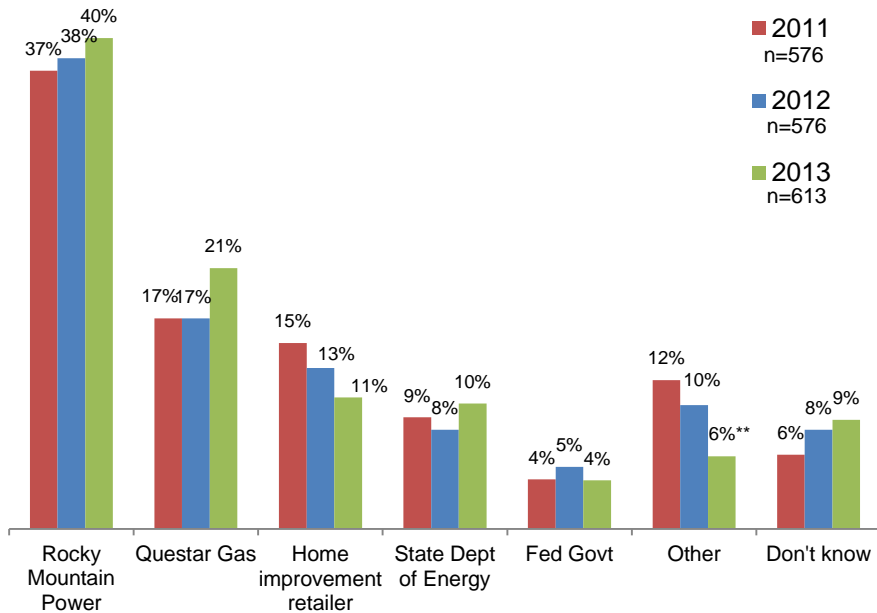
\* Significantly different from 2011  
 \*\* Significantly different from 2012

# Communication

Rocky Mountain Power receives the highest mention as first source for energy efficiency information. Customers believe *utility bill inserts* and *media ads* are most effective to communicate how to lower energy usage and save money on their utility bill.

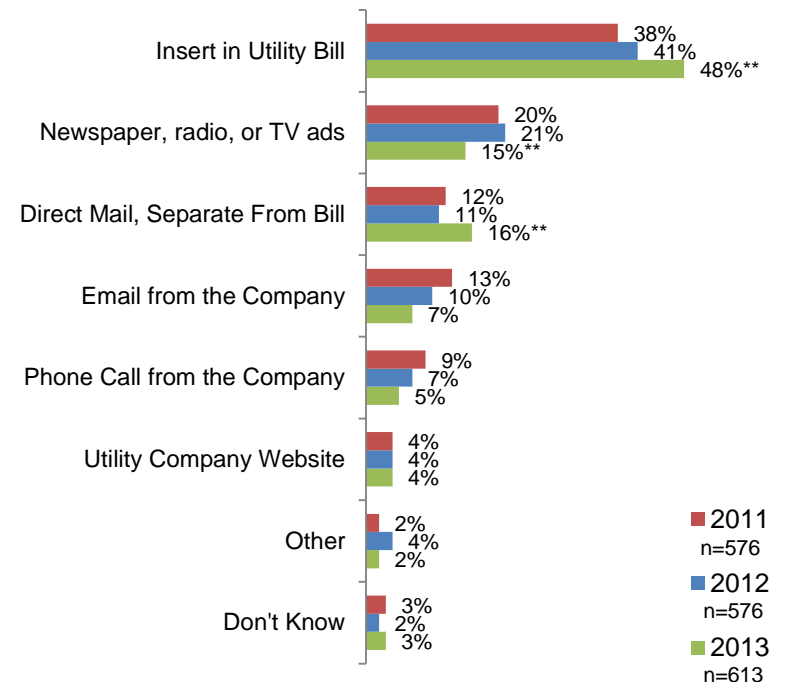
## Where Respondents Turn to First for Information

[Q127. Which one of the following would you most likely turn to first for energy-efficiency information?]



## Most Effective Ways to Communicate

[Q128. 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?]



\* Significantly different from 2011  
 \*\* Significantly different from 2012

***For comments or inquiries regarding this report, contact the following:***

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