

ENERGY UPGRADE CALIFORNIA TRACKING SURVEY

Wave 1 Results

10/14/2019



Overview of Findings

- Aided awareness of the Energy Upgrade California (EUC) brand is increasing over time (34%).
- Unaided awareness of EUC is low but holding steady (8%).
- Californians increasingly agree with mission of the EUC campaign.
- An increasing percentage of Californians believe EUC is relevant and needed and that they can trust the brand.
- Californians' attitudes in 2019 about existing opportunities to make their home more efficient are similar to 2017.
- Californians are more likely to recognize energy saving opportunities from home upgrades than changing their behaviors.
- More renters than owners see opportunities to upgrade their homes and are more likely to act on these opportunities.
- Respondents most frequently suggested they could make common behavioral changes, but also suggested making more advanced changes, such as shifting use to off-peak times.
- Respondents' beliefs align with EUC marketing strategies (e.g., importance of addressing climate change).



Research Objective: Establish a baseline to measure key ME&O program performance metrics over time

Objectives	Key Measures	Slides
Awareness	Brand Awareness – Aided	6
	Brand Awareness – Unaided	8
	Brand Familiarity	7
Intent	Motivation to manage energy use	17-22, 25*, 27
	Knowledge of specific actions, behaviors, and opportunities to manage energy use	28, 30*, 31*, 32
Campaign Design and Performance**	Agreement with campaign mission	13, 14, 15
	Agreement with campaign themes	34,35

* Indicates preferred measurement of metric

** Evaluation team developed performance indicators



Survey Methodology

- Conducted a mail-push-to-web, multilingual survey with 1,379 Californians
 - Mailed simple random sample of California residents a letter inviting them to complete survey on-line or call phone center to complete survey with telephone interviewer
 - Followed initial invitation with two reminders
- Response rate: 19%
- Respondents could complete the interview in either English, Spanish, or Chinese
 - English: 1,338
 - Spanish: 26
 - Chinese: 14
- Field dates: 6/04/2019 - 07/01/2019
- All results weighted to California statewide population in terms of home ownership status, education, and ethnicity

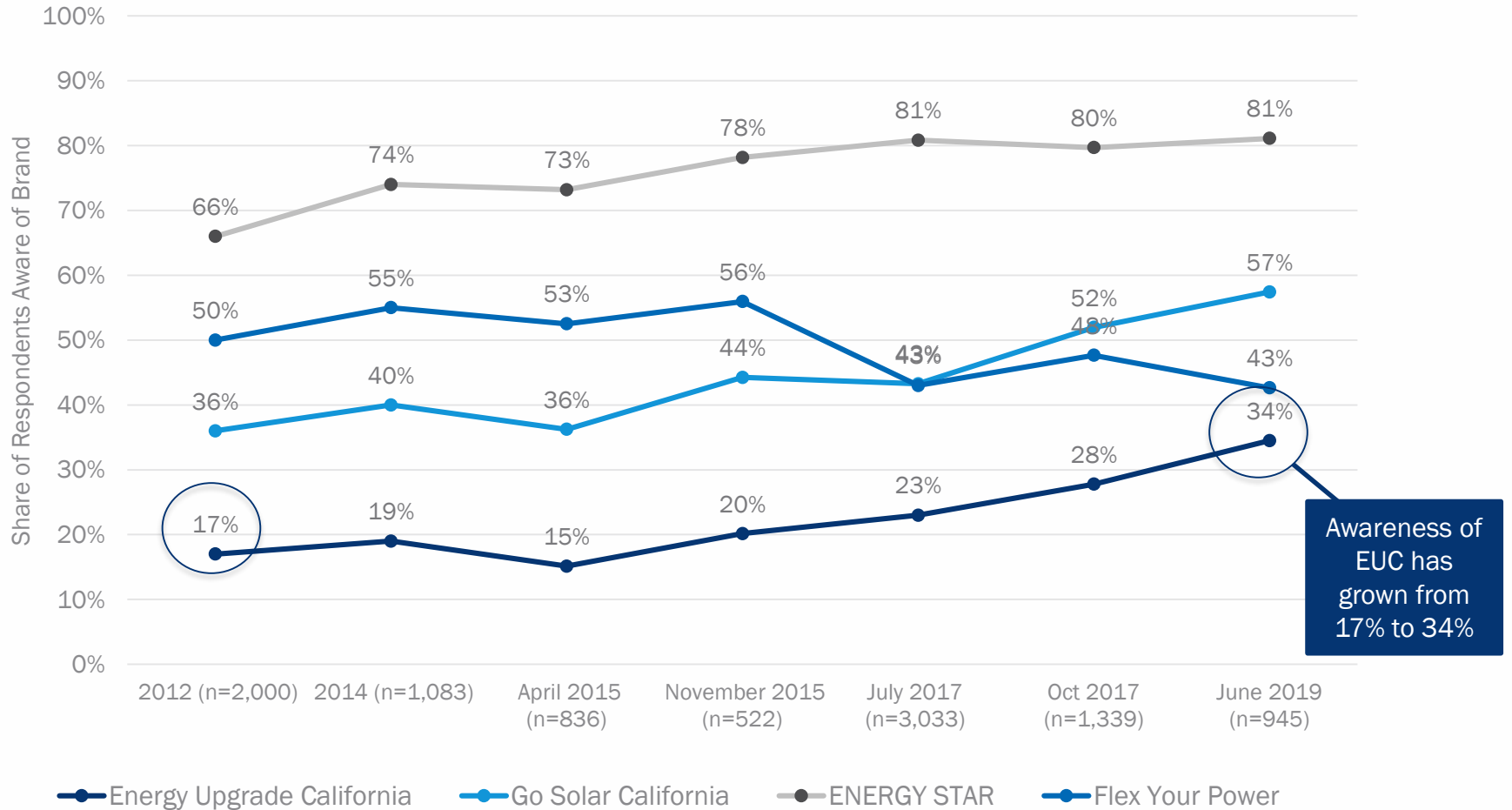


Energy Upgrade California Awareness & Familiarity

Key Finding: Aided awareness of the Energy Upgrade California Brand is increasing over time (Slide 6). Unaided awareness is low but holding steady (Slide 8).



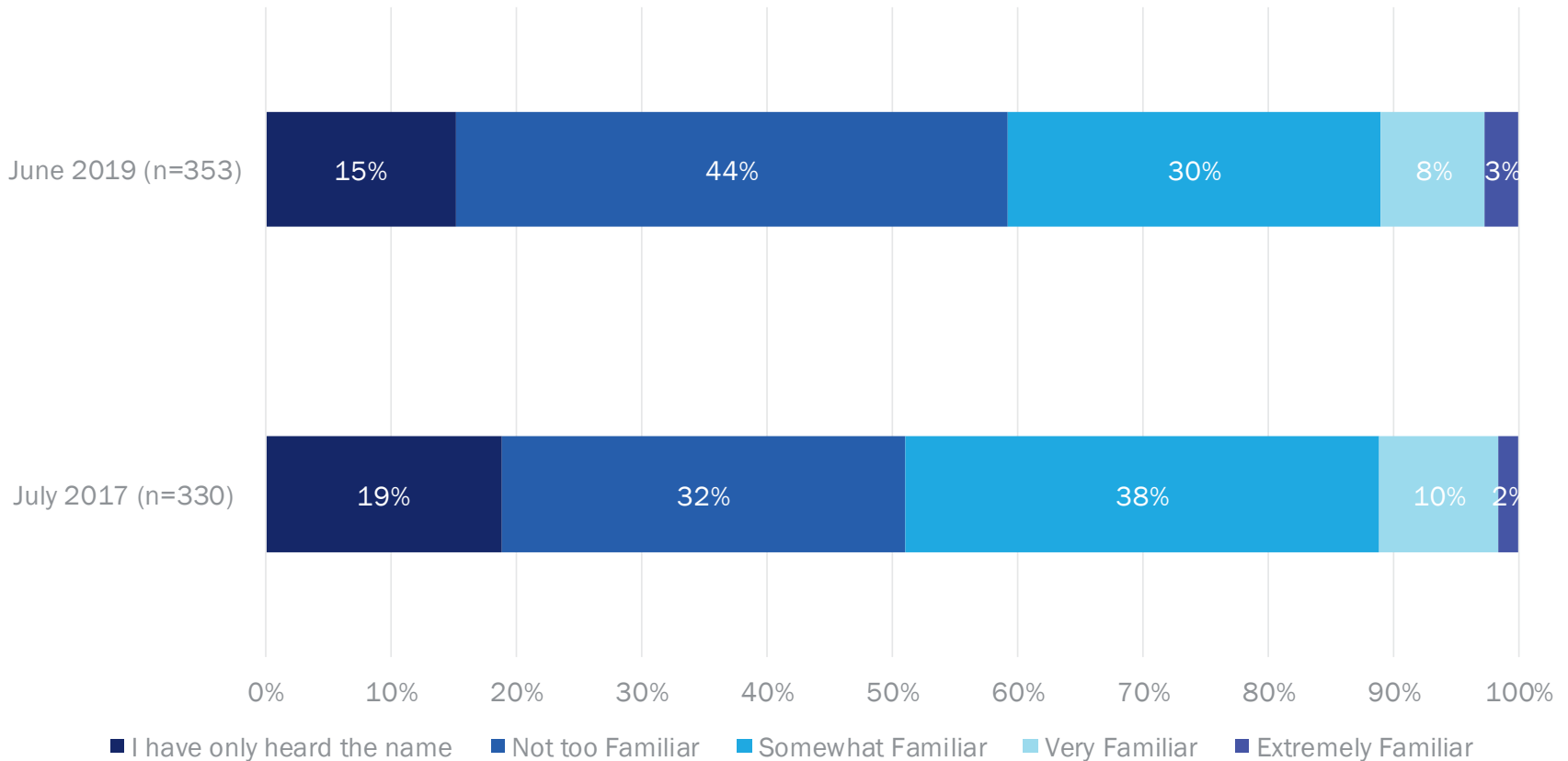
Awareness of the EUC Brand continues to increase



Sample sources: 2012 Random digit dialing telephone survey; 2014, 2015, 2017 YouGov web panel survey; October 2017 and June 2019 ABS internet/phone sample.

Respondents who are aware of EUC have a moderate to low level of familiarity with the Brand. Familiarity has dropped slightly from 2017.

How Familiar are you with Energy Upgrade California?

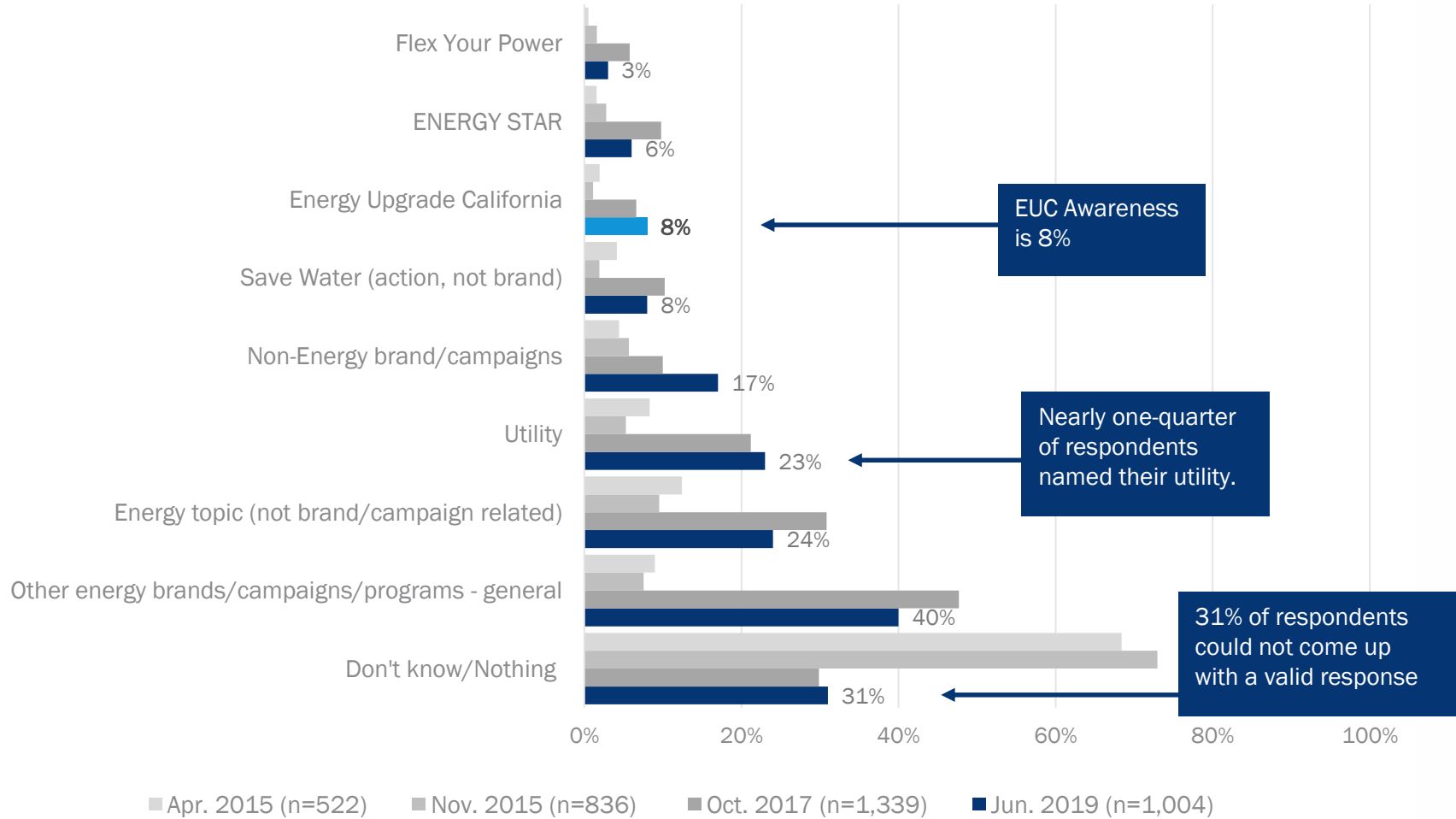


Note: This question was only asked of respondents who were aware of Energy Upgrade California



Few Californians offer EUC unprompted as a brand or campaign that encourages energy savings. The level unaided awareness is similar to 2017

Unaided Awareness of Brands or Campaigns that Encourage Energy Savings



A small percentage of respondents recognized EUC slogans. Very few who did were able to correctly name EUC as the sponsoring brand



8% of respondents said they recognized the “Do Your Thing” advertising slogan.

2% of respondents who recognized the slogan correctly identified that Energy Upgrade California is the brand associated with this slogan (unaided)



12% of respondents said they recognized the “Keep it Golden” advertising slogan.

3% of respondents who recognized the slogan correctly identified that Energy Upgrade California is the brand associated with this slogan (unaided)

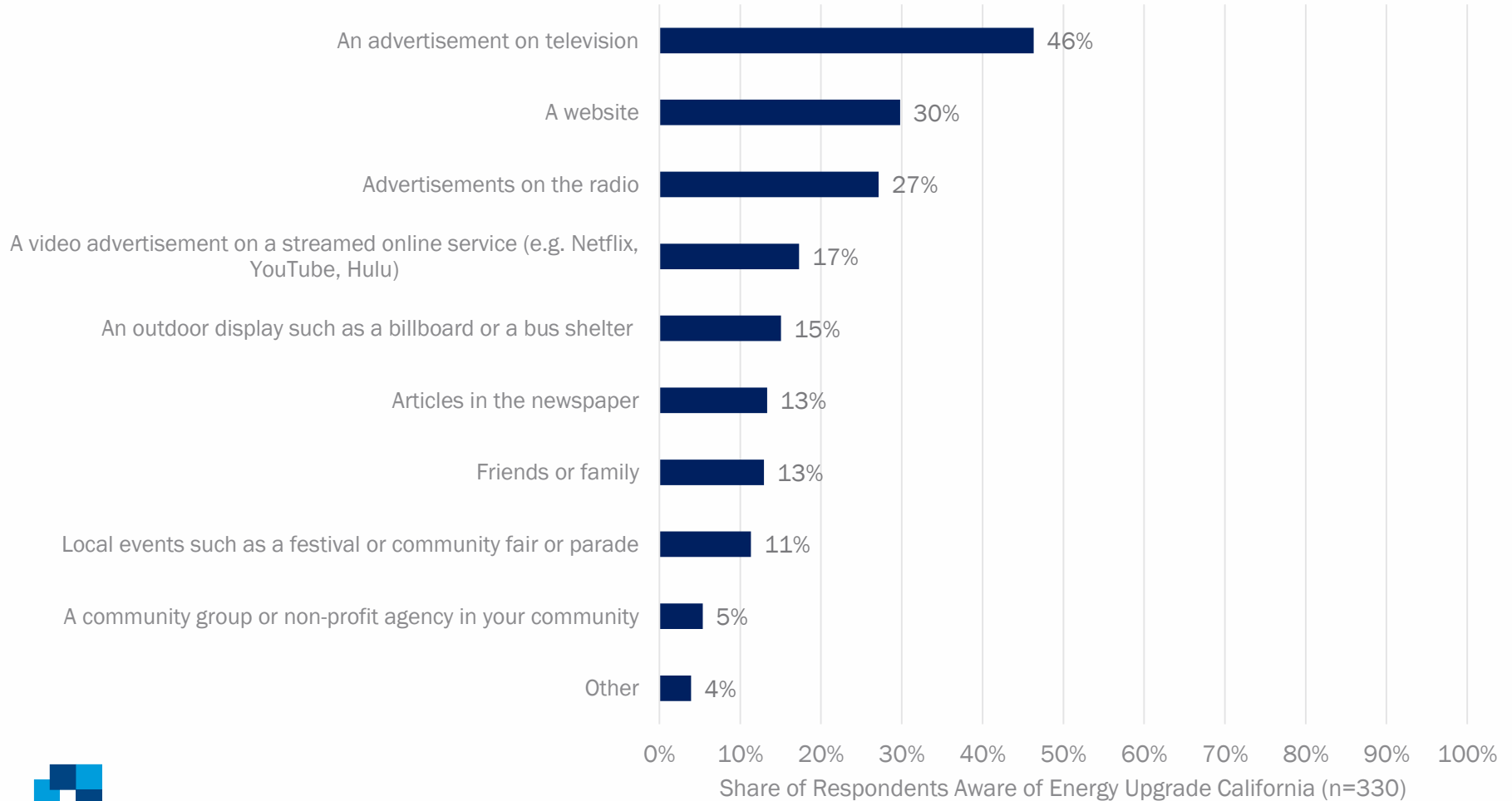


14% of respondents recalled seeing the EUC logo



Respondents aware of EUC most frequently learned about the campaign from TV ads

Where did you see or hear about Energy Upgrade California?



Response to Campaign Mission

Key Finding: Californians increasingly agree with mission of the EUC campaign (Slide 13). An increasing percentage believe EUC is relevant and needed and that they can trust the brand (Slide 14 and 15).

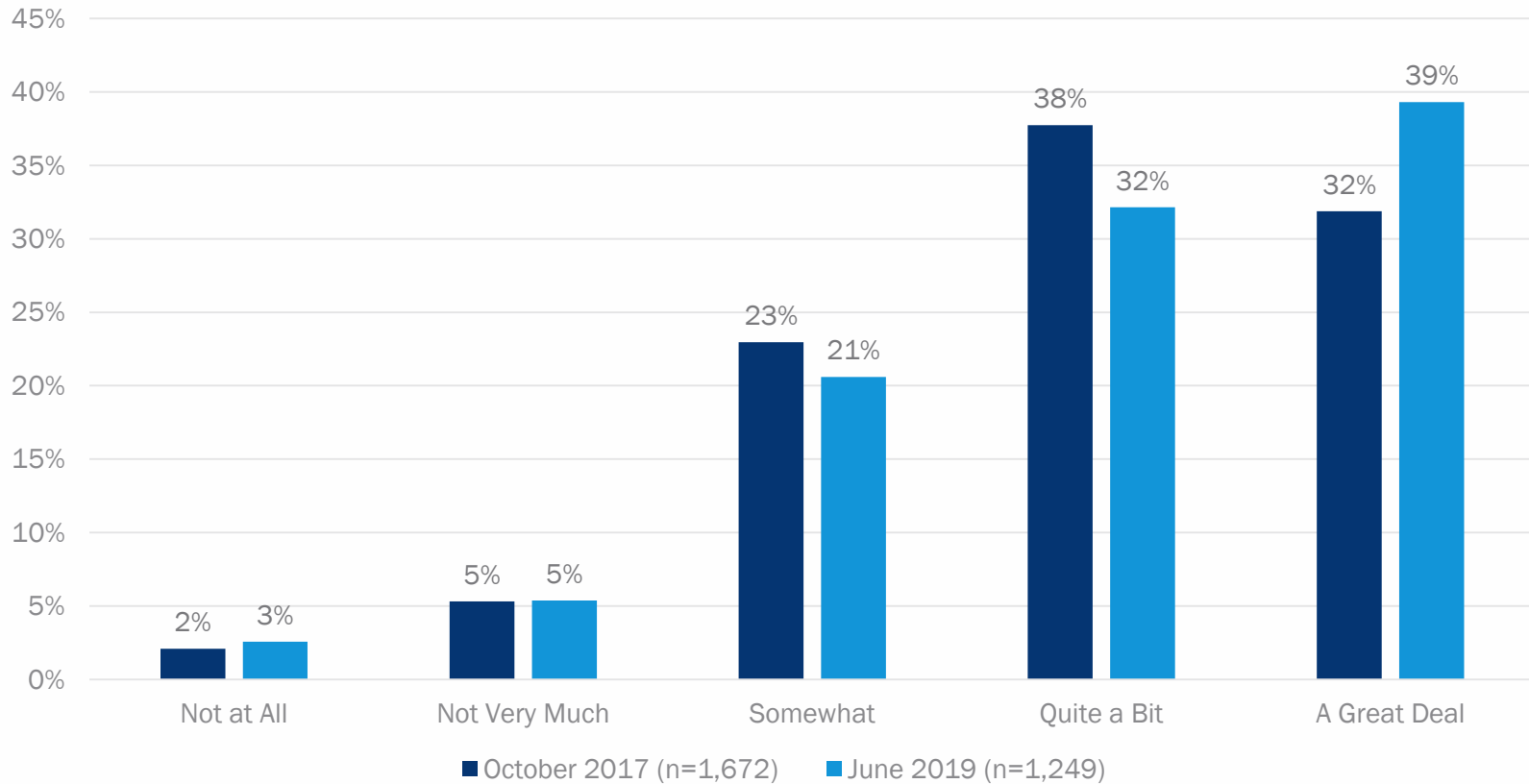


Measurement of Customer Belief in EUC Mission

- We presented all respondents with a description of EUC's mission:
 - Energy Upgrade California is a statewide campaign that helps Californians better manage their energy use by providing tools, knowledge, and inspiration. The campaign is a partnership between the State of California, utilities, regional energy networks, local governments, community choice aggregators, businesses and non-profits.
- We followed this description with three questions about the campaign and the state's need for such a campaign, whether it was relevant for their lives, and the extent to which they could trust it.

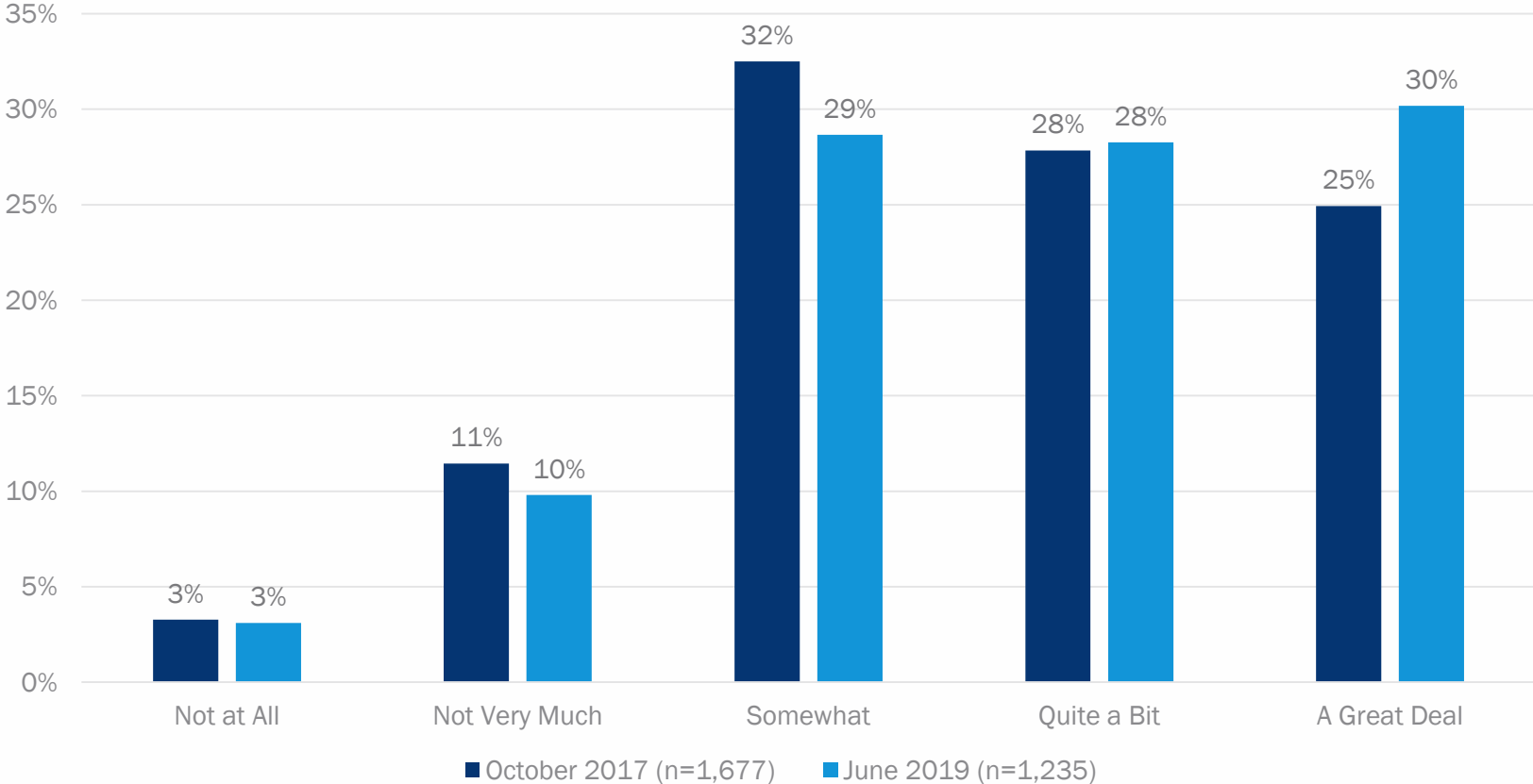
Californians increasingly believe that California needs a campaign like EUC

How much do you think the people of California need a campaign like Energy Upgrade California?



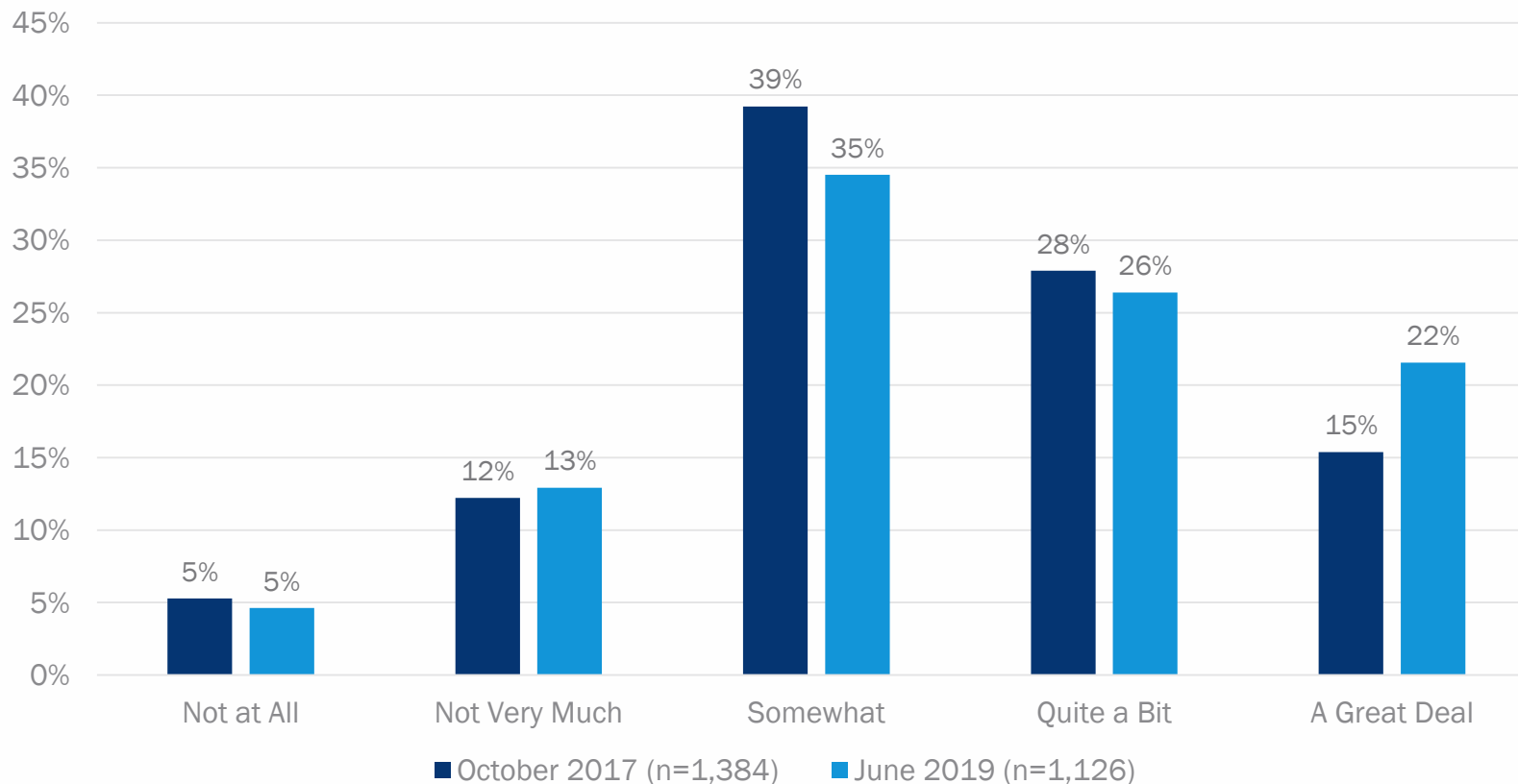
An increasing percentage of Californians feel the campaign is relevant for their lives

How relevant is the mission of Energy Upgrade California for people like you?



A growing percentage of Californians feel they can trust EUC to do the right thing for Californians but half remain suspicious

How much do you think you can trust Energy Upgrade California to do the right thing for the people of California?



Energy Management Motivation

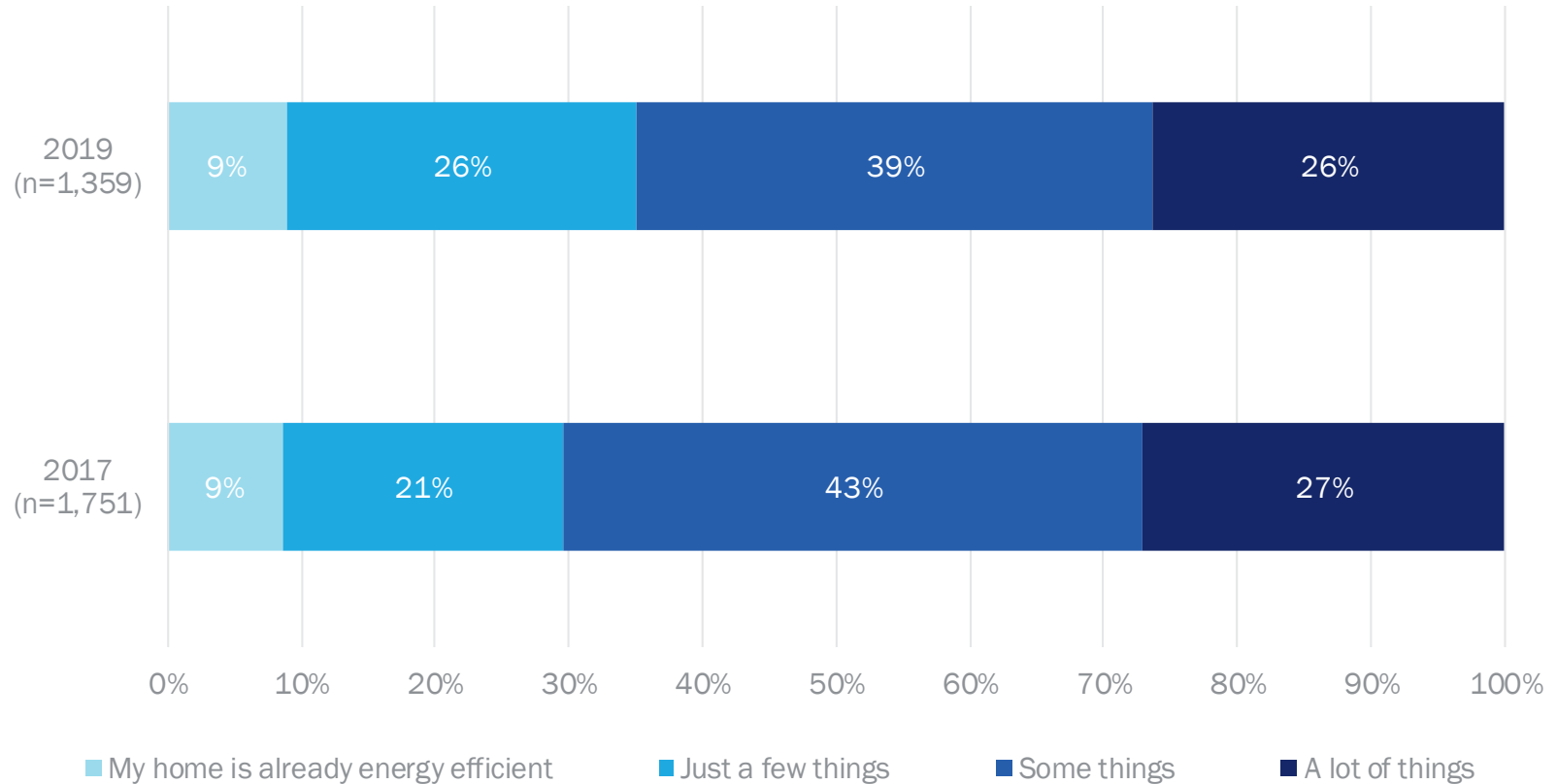
Key Findings:

- Californians' attitudes in 2019 about existing opportunities to make their home more efficient are similar to 2017 (Slide 17)
- Similar to previous surveys, Californians are more likely to recognize energy saving opportunities from home upgrades than changing their behaviors (Slide 19)
- More renters than owners see opportunities to upgrade their homes and are more likely to act on these opportunities (Slide 20, 22)



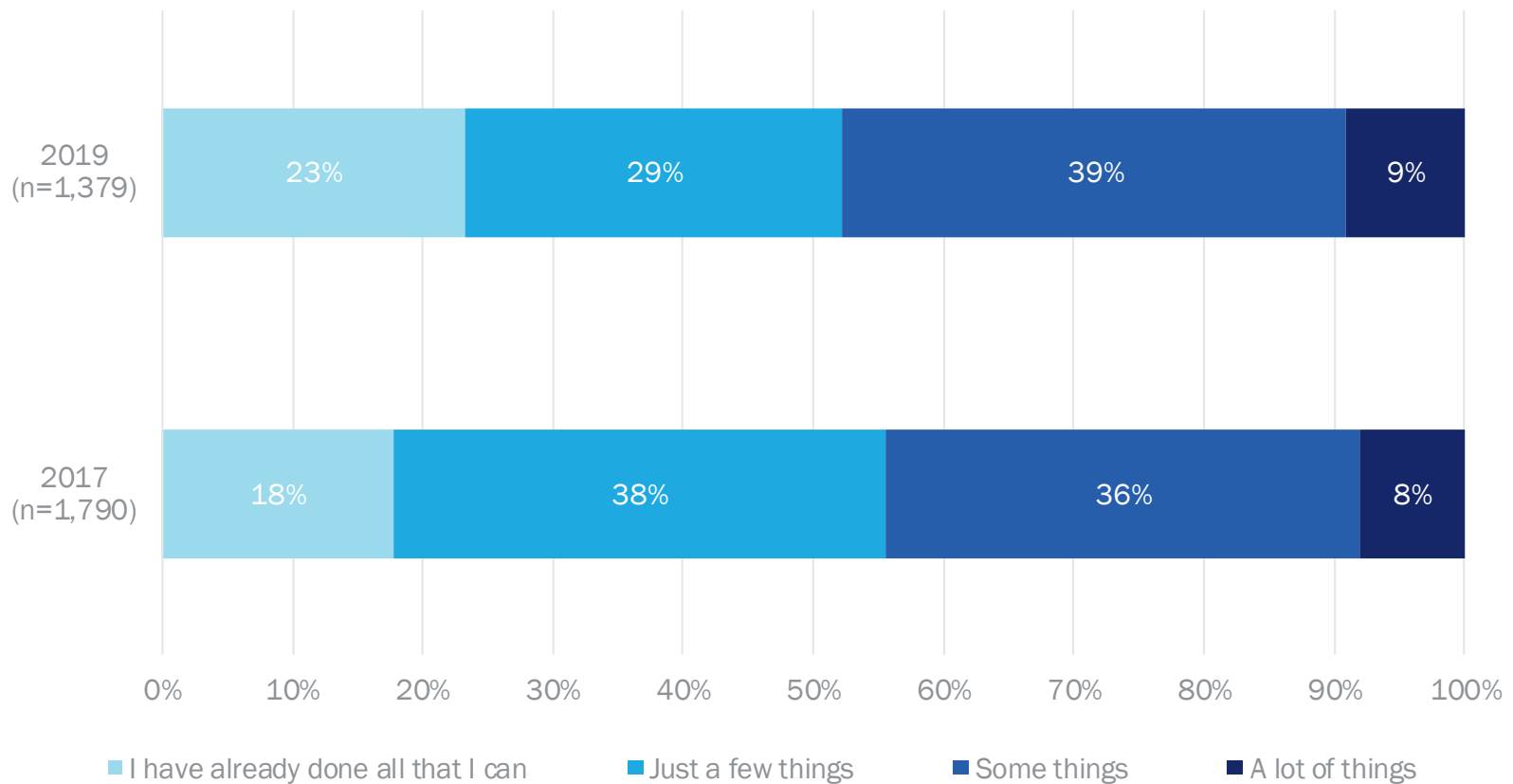
Californians' attitudes about opportunities to make their home more efficient are have changed little from 2017

How much more efficient could you (or you and your landlord) make your home if you tried? Could you change...



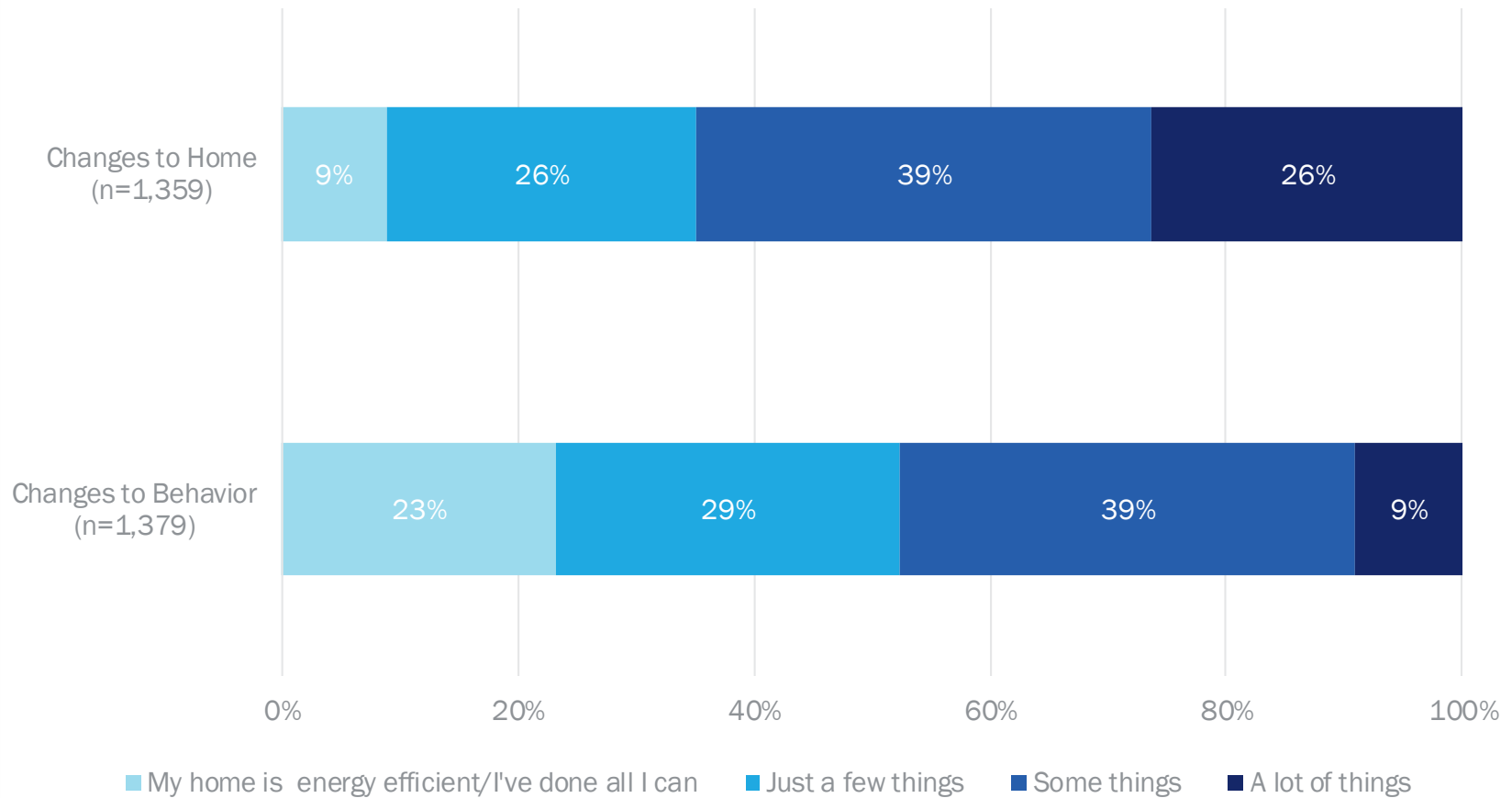
Californians are more likely to feel that they have changed all they can of their day-to-day actions to save energy compared to 2017

How many of your day-to-day actions could you change to save energy if you tried?



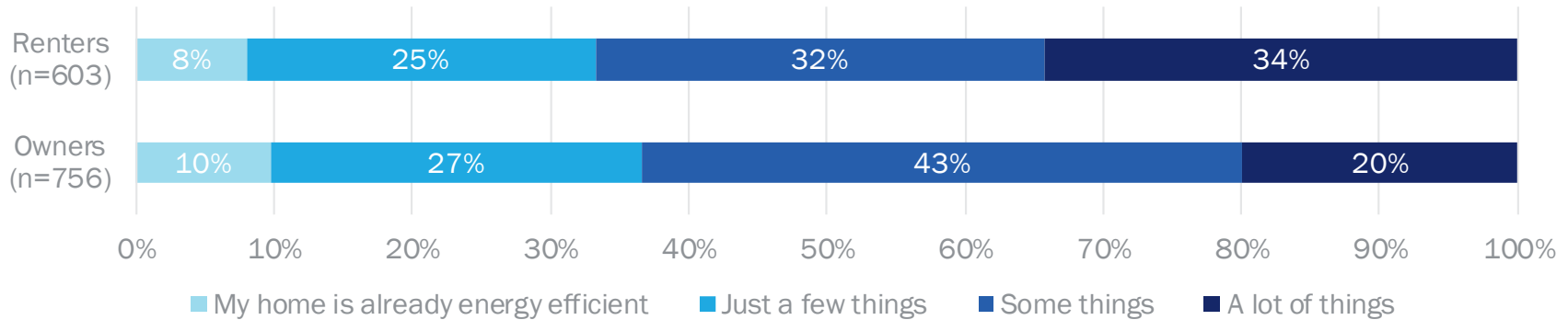
Californians feel they have more opportunities to increase the efficiency of their homes than to make changes to their day-to-day behaviors

Opportunities to Save Energy

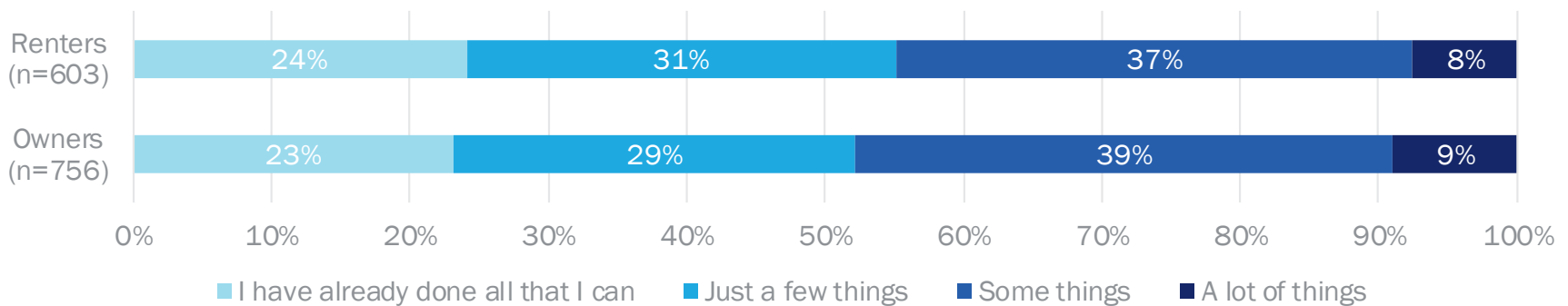


Renters believe there are more opportunities to make their homes more efficient compared to owners

How much more energy efficient could you (or you and your landlord) make your home if you tried?

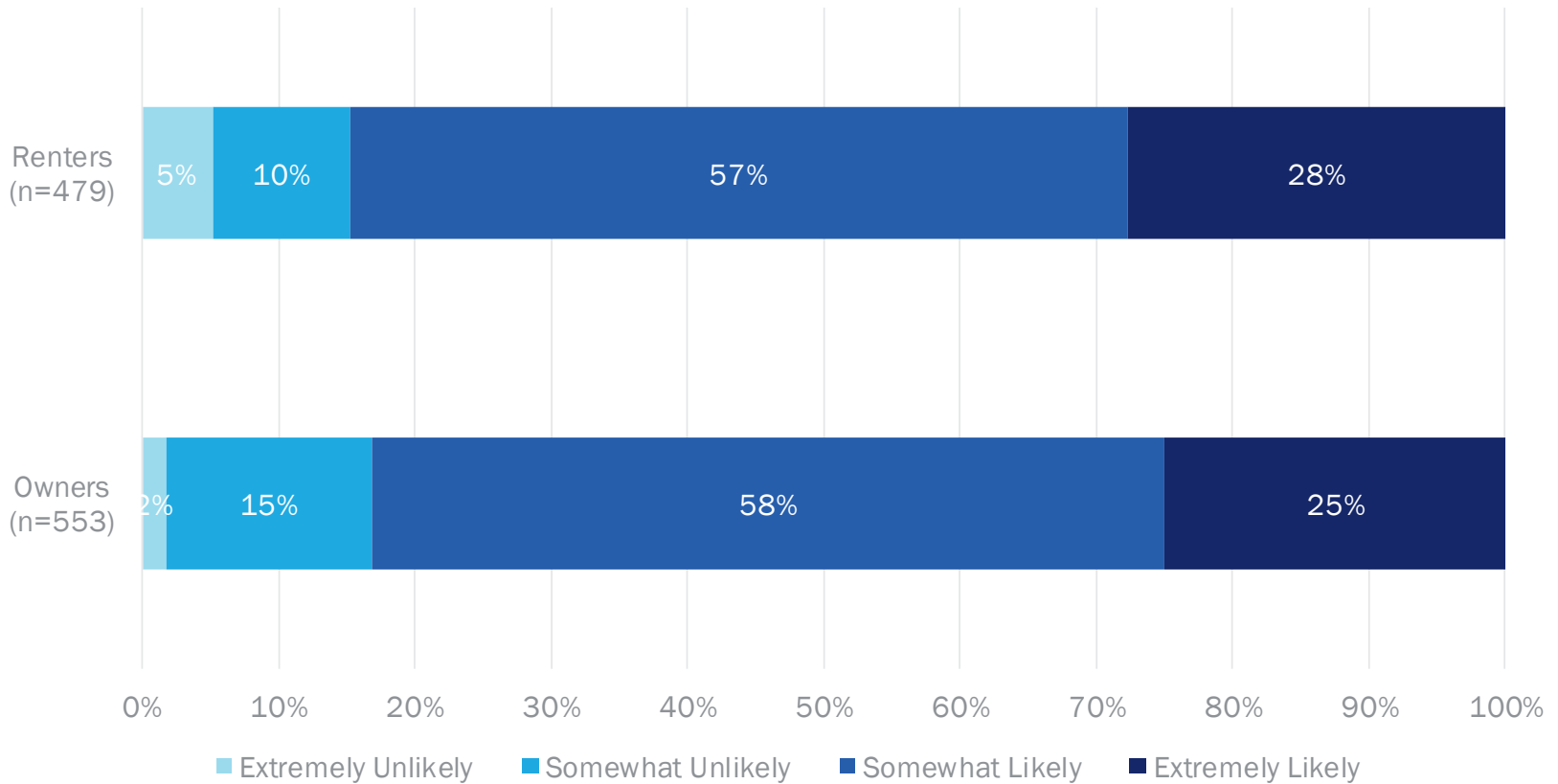


How many of your day to day actions could you change to save energy if you tried?



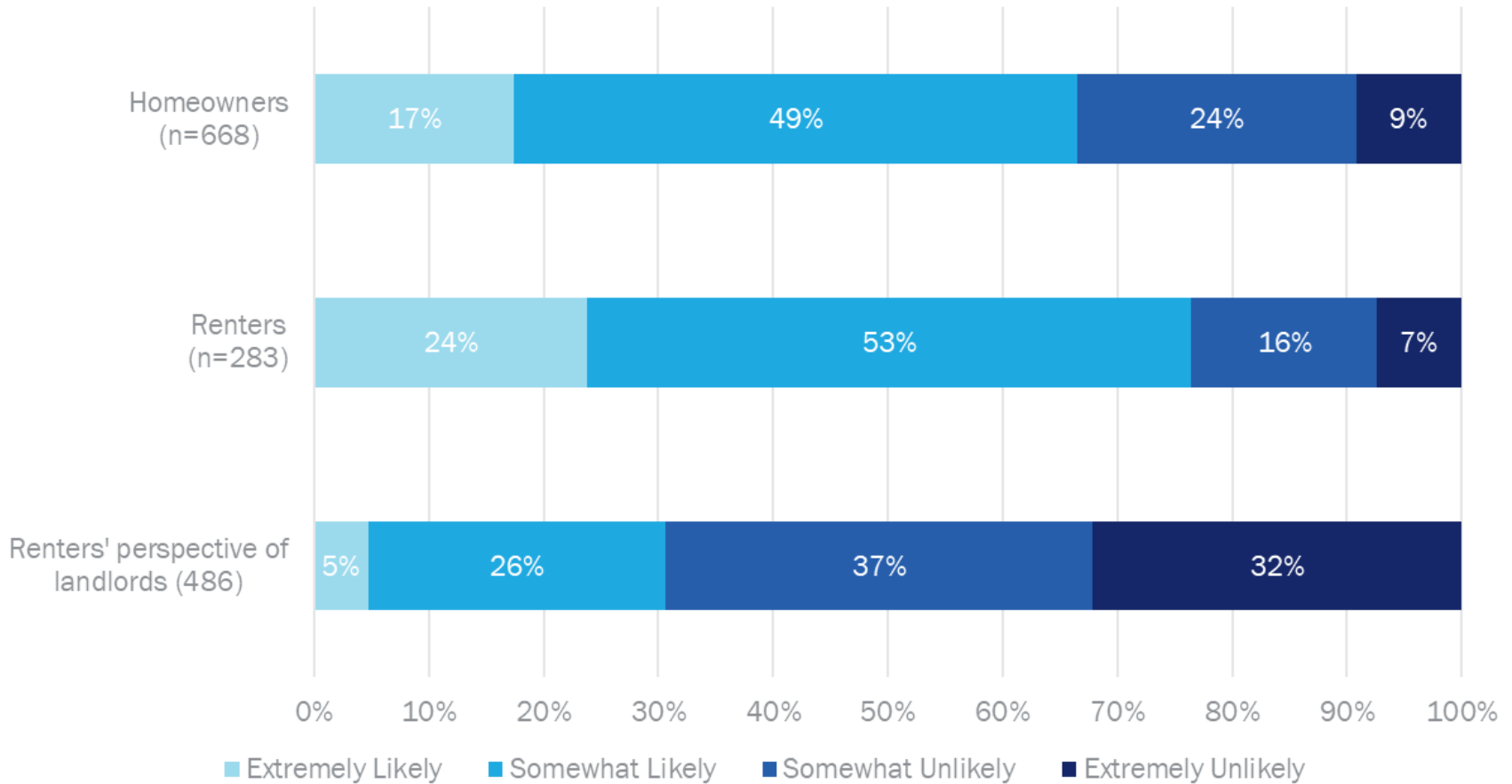
Renters and owners are equally likely to change their behaviors to save energy

How likely are you to attempt to change your day-to-day actions to save energy in the next 12 months?



Renters who believe their home could be more efficient are more likely than similar owners to make these changes. Few renters expect their landlords to make changes.

Likelihood of making changes to the home to make it more energy efficient



Renters believe that landlords are unlikely to make tenants' homes more energy efficient due to split incentives

Why do you think your landlord is unlikely to make your home more energy efficient?	Share of respondents who believe their landlord is unlikely to make upgrades (n=338)
My landlord does not have to pay the energy bill so doesn't care that my home is not efficient	52%
My landlord always waits for things to break before replacing them and things are in good condition	45%
My landlord always buys the least expensive option possible and won't pay more for a more efficient option	30%
My landlord does not have the money to make improvements	11%

Who will make the upgrades?

48% of tenants think most of the changes that need to be made to their home are things their landlord would need to do.

41% believe some changes are things that they could do and some are things their landlord would need to do.

11% believe most of the changes are things they could do.



The biggest barriers for both renters and owners are up-front costs and the perception that saving benefits do not outweigh costs.

- Why are respondents unlikely to make their homes more energy efficient?

Renters

39% say that as a renter, it isn't worth the investment

39% say the upfront costs of the improvements would be too high

Owners

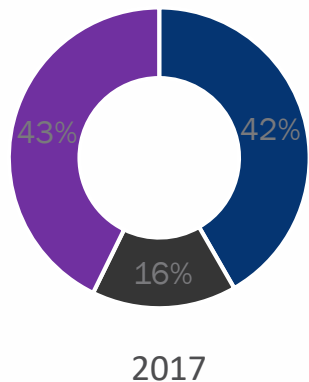
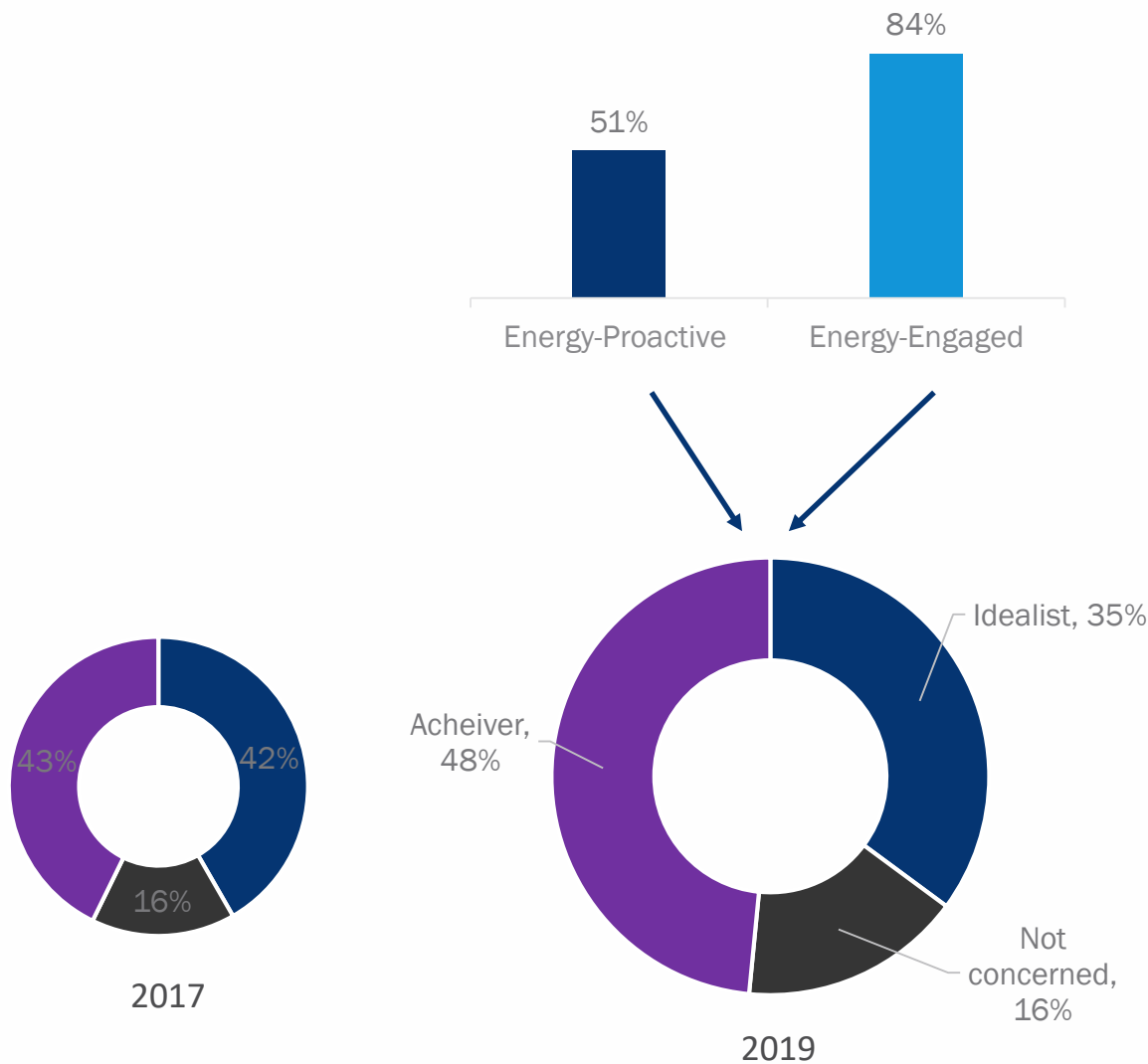
68% say the upfront costs of the improvements would be too high

37% say the energy savings are not big enough to justify the costs.

25% say energy efficiency improvements to their home would not bring a return on investment, or appliance/system still working.



Nearly half of Californians are Achievers (concerned and engaged about energy), which is an increase from 2017. A small percentage remain unconcerned about their energy use.



Achievers are Energy-Engaged and Energy-Proactive.

Idealists are Energy-Engaged but not Energy-Proactive.

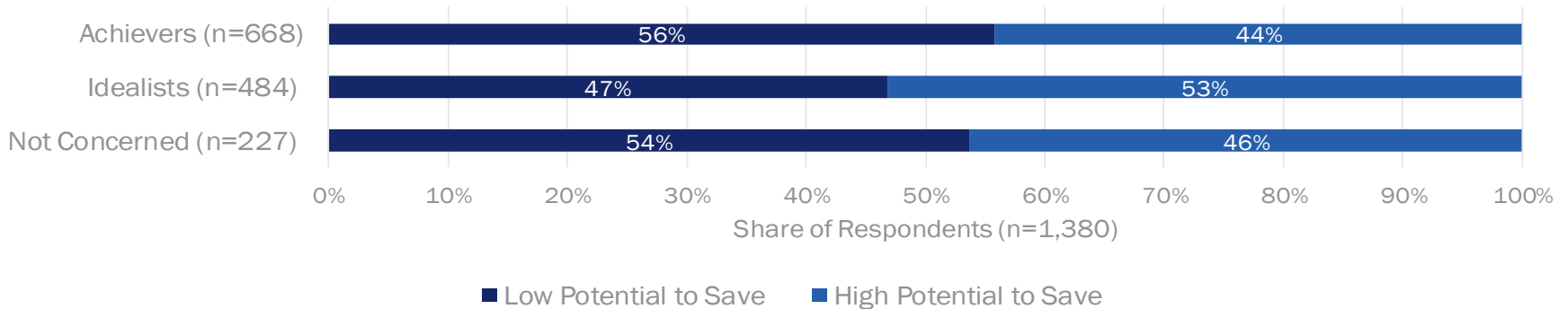
Not Concerned are neither Energy-Engaged or Energy-Proactive.

Energy-Engaged are particularly concerned about their energy use

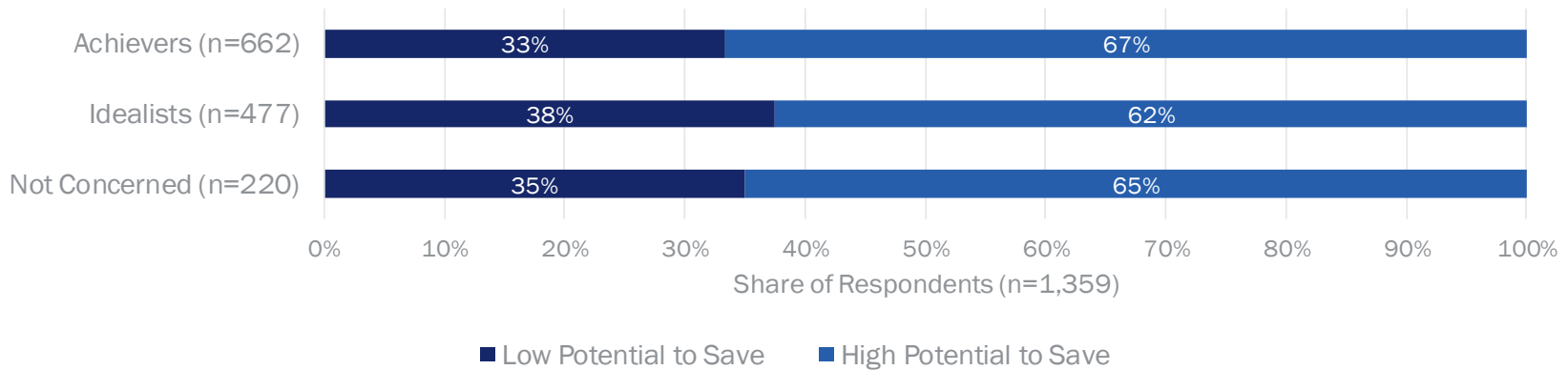
Energy Proactive make an effort to live in ways that reduce their energy use all the time

Achievers see potential to change and are most likely to achieve it. Idealists see potential and care but need motivation. The Unconcerned have potential but are less likely to recognize it and may require convincing.

How many of your day-to-day actions could you change to save energy if you tried?

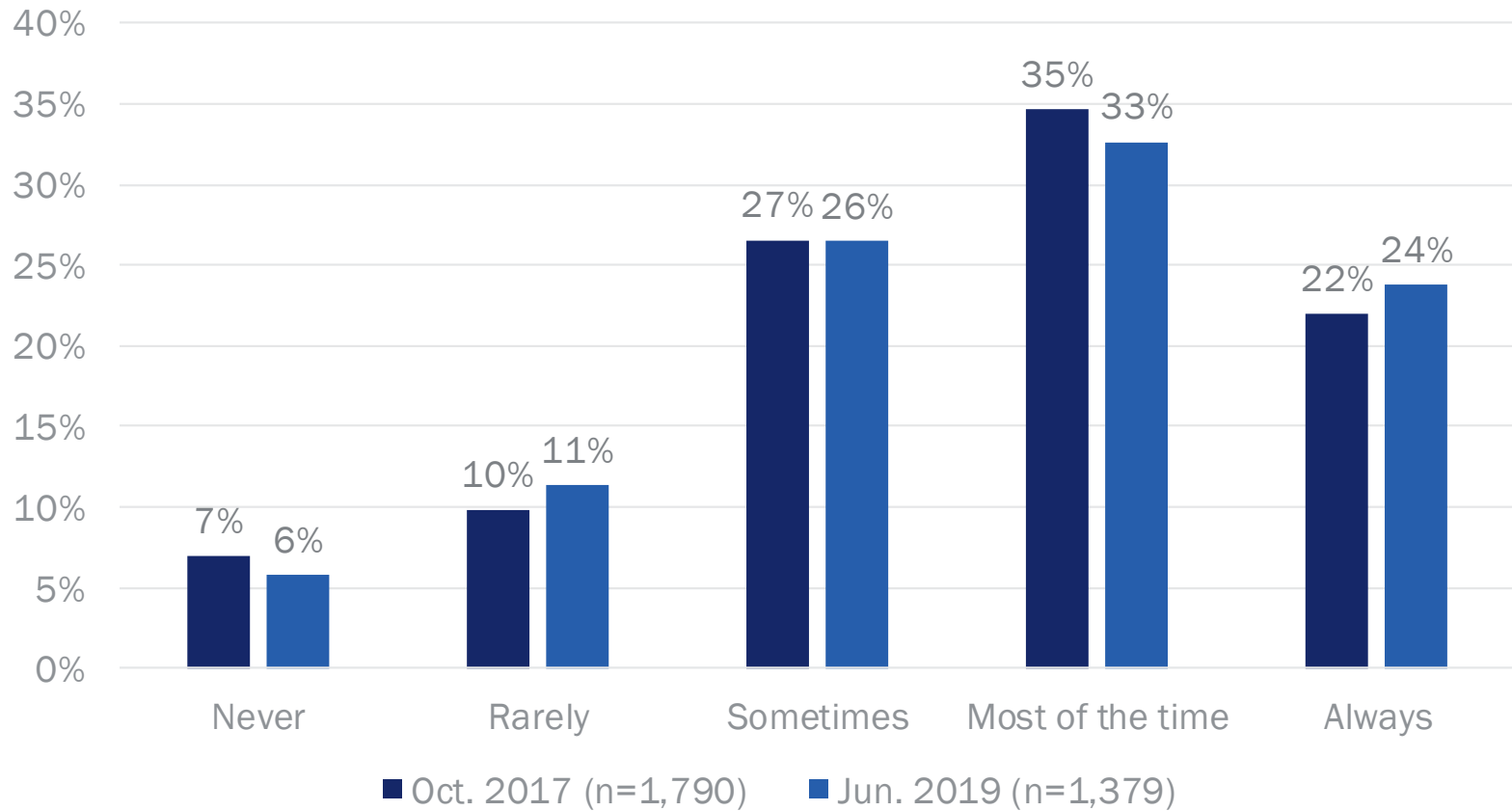


How much more energy efficient could you make your home if you tried?



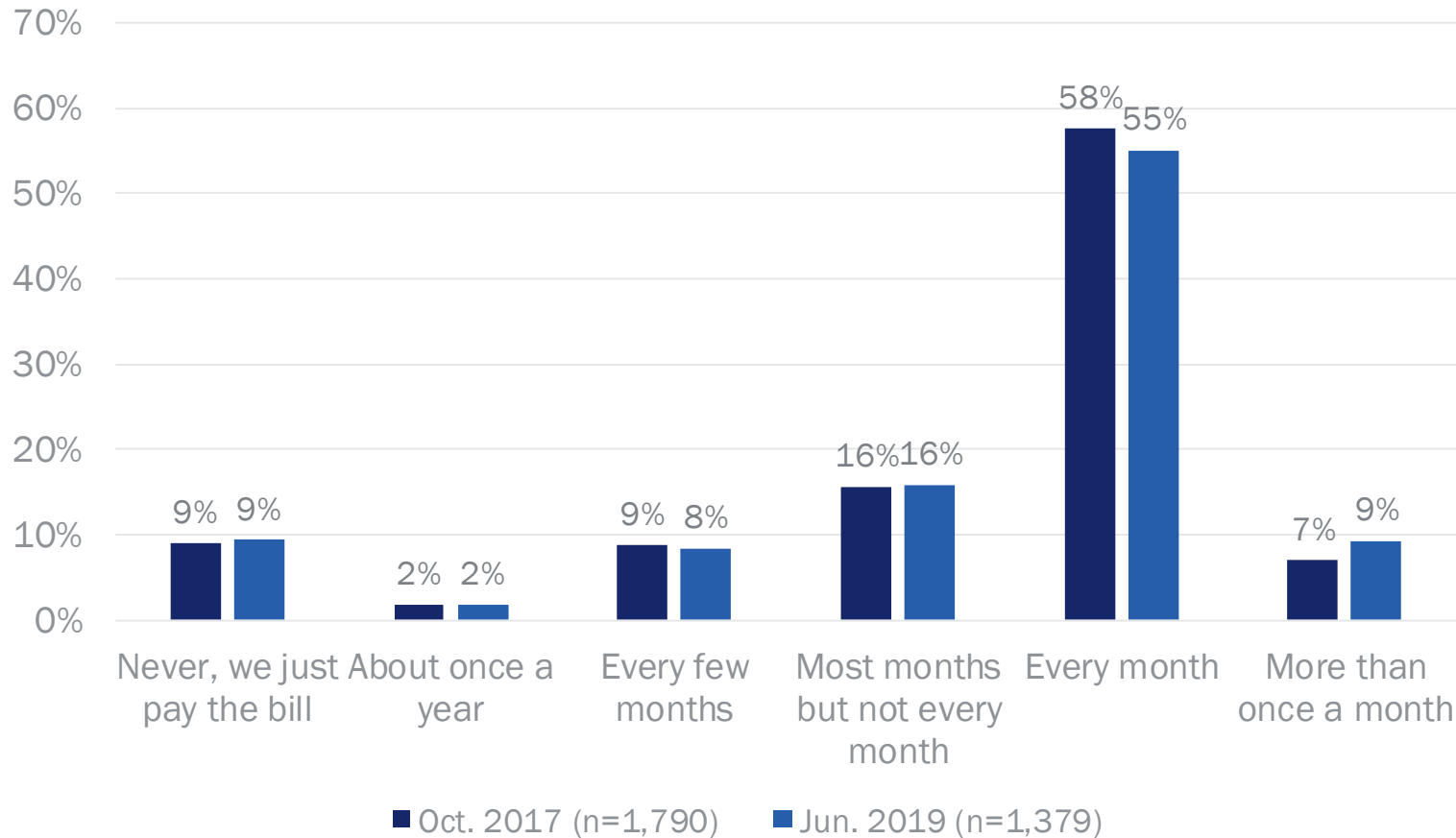
A slight majority consider energy use for at least most of their household appliance and electronics purchases. There is little change since 2017.

How often does the amount of energy used by the product influence your purchasing decisions?



A majority of Californians frequently monitor their energy use through their utility bills. There is little change since 2017.

How often does someone in your household look at your household's utility bill to see if you used more or less energy than usual



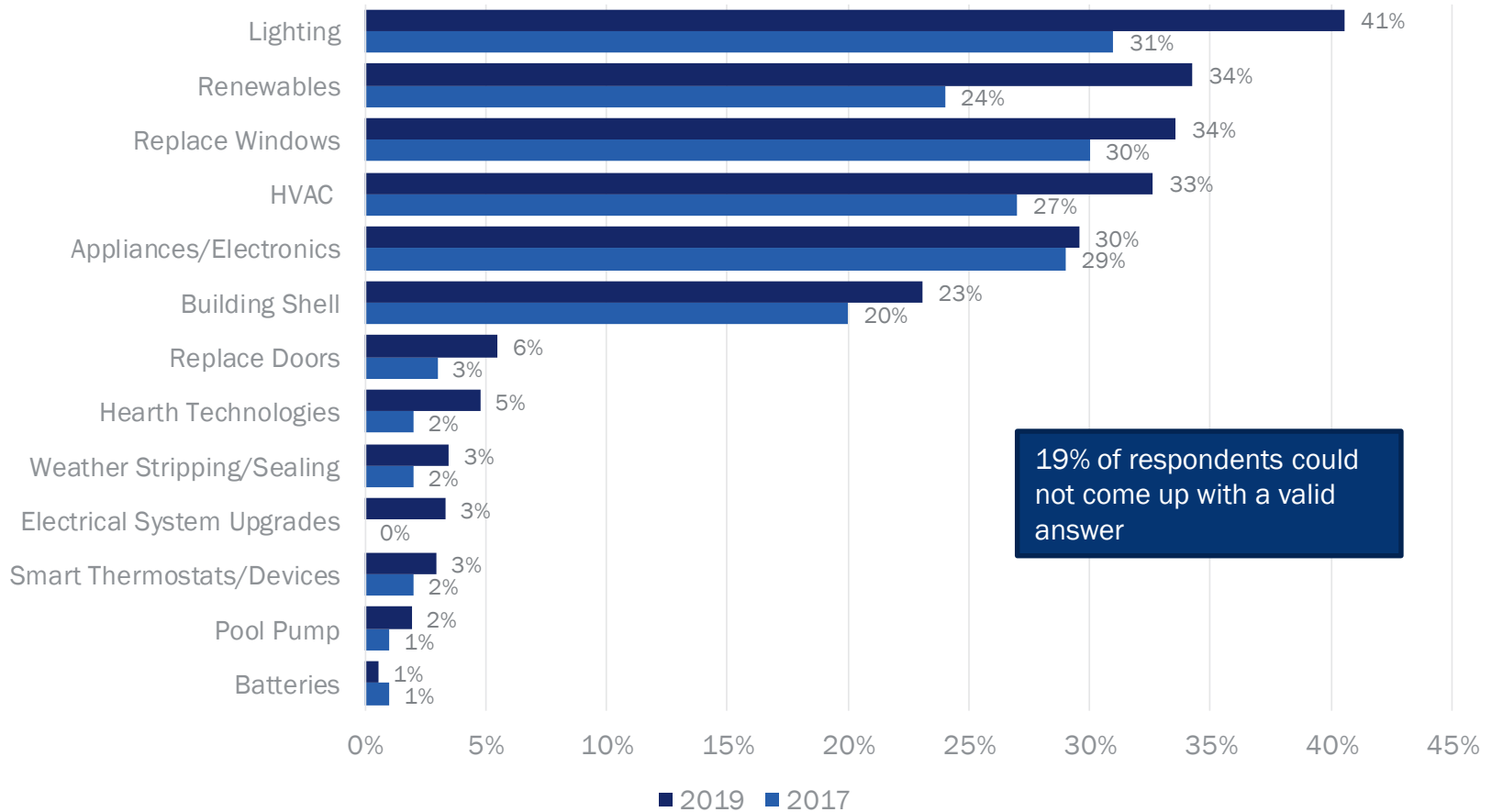
Energy Education: Awareness of Energy Management Options

Key Finding: Respondents most frequently suggested they could make common behavioral changes, but also suggested making more advanced changes, such as shifting use to off peak times (unaided) (Slide 30).



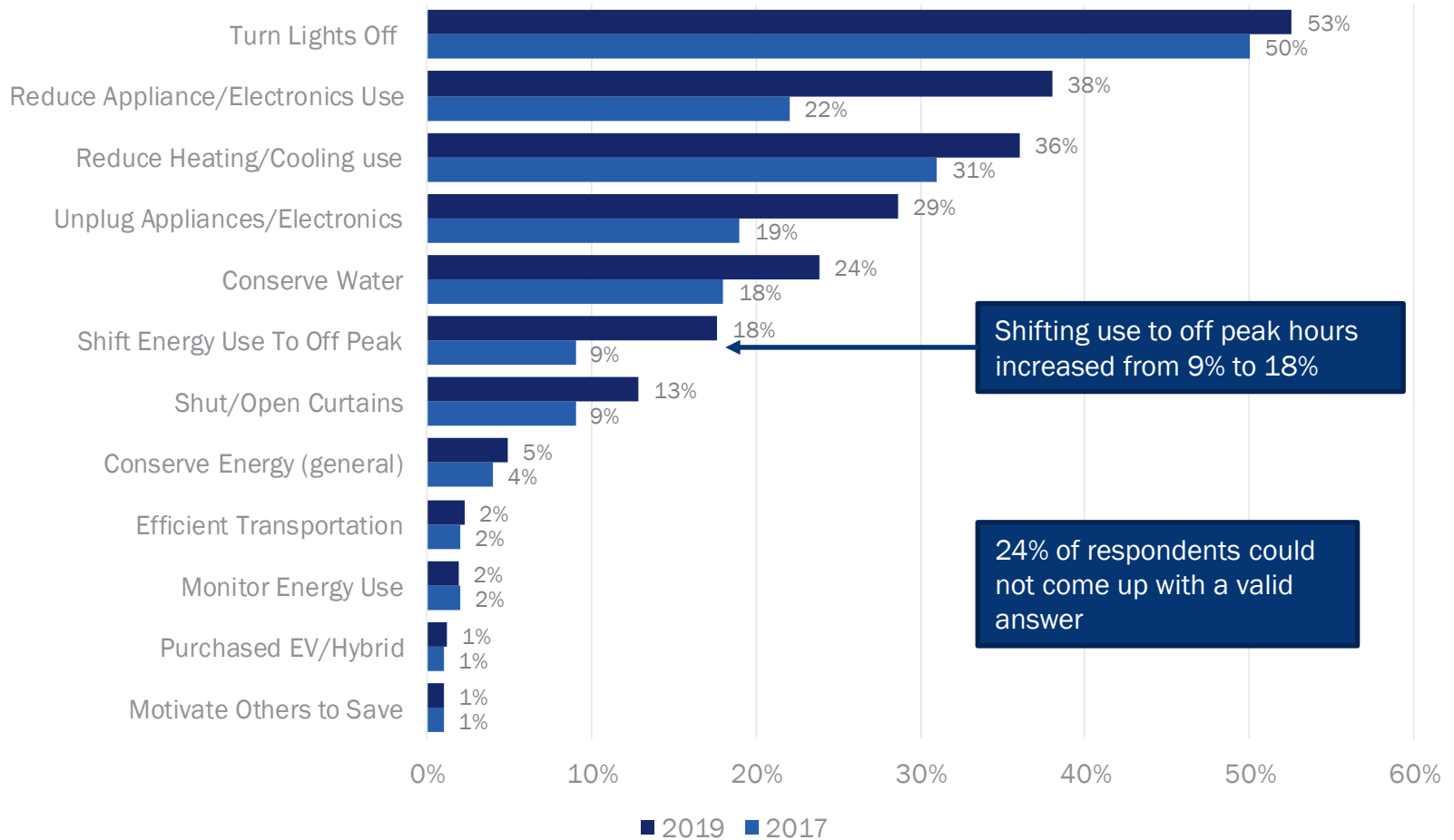
Compared to 2017, more respondents felt they could make efficiency upgrades across all areas but especially in lighting upgrades and use of renewables.

What changes could you (or you and your landlord) make to your home to make it more efficient?



Compared to 2017, a much greater percentage of Californians feel that reducing use of appliances/electronics and shifting use to off-peak hours are actions they could take to have an impact

What changes could you make to your day-to-day actions to save energy?

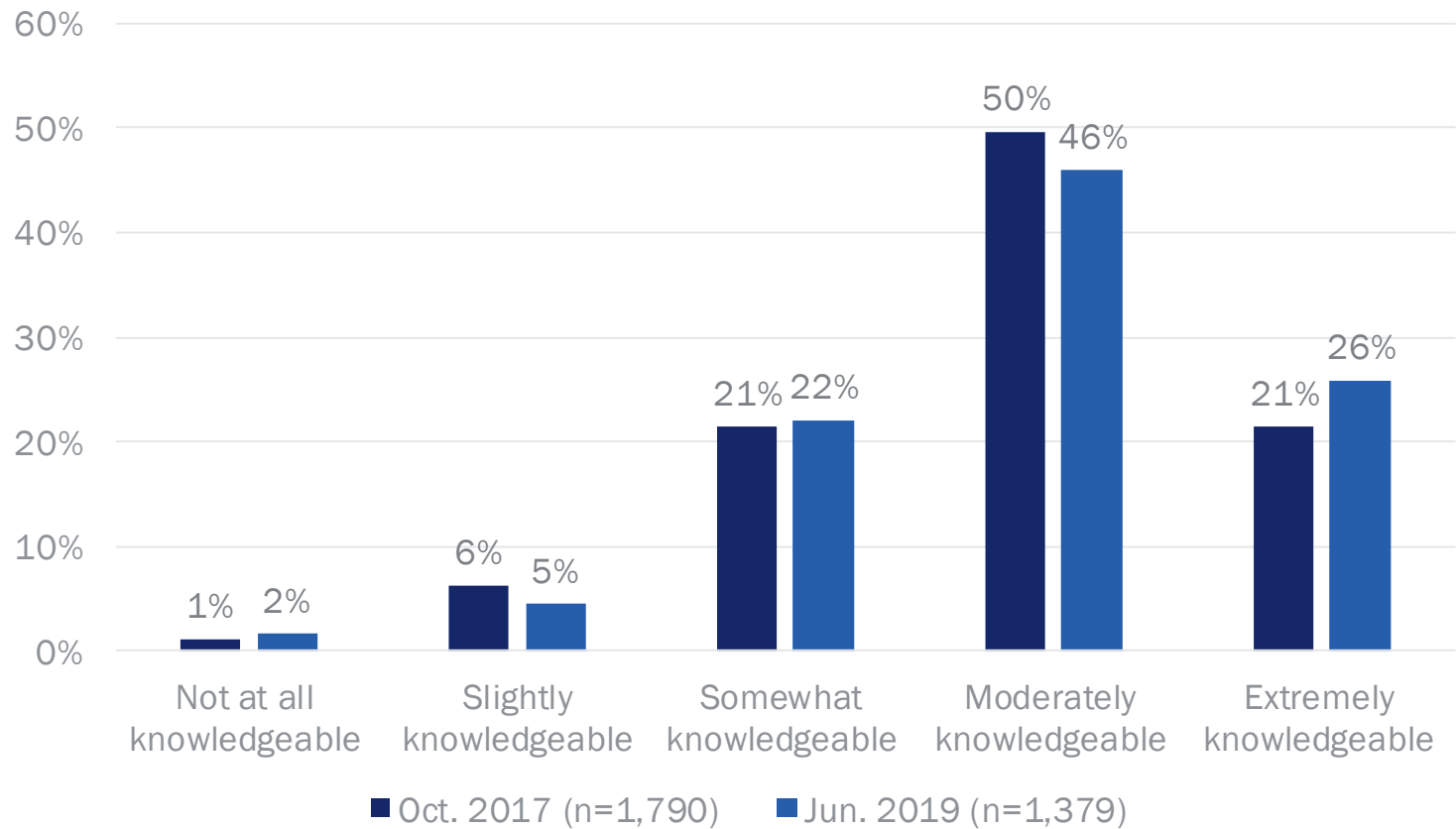


Shifting use to off peak hours increased from 9% to 18%

24% of respondents could not come up with a valid answer

Respondents' perceive themselves to be knowledgeable about how to save energy in their homes. Knowledge has increased slightly since 2017

How knowledgeable would you say you are about saving energy in your home?



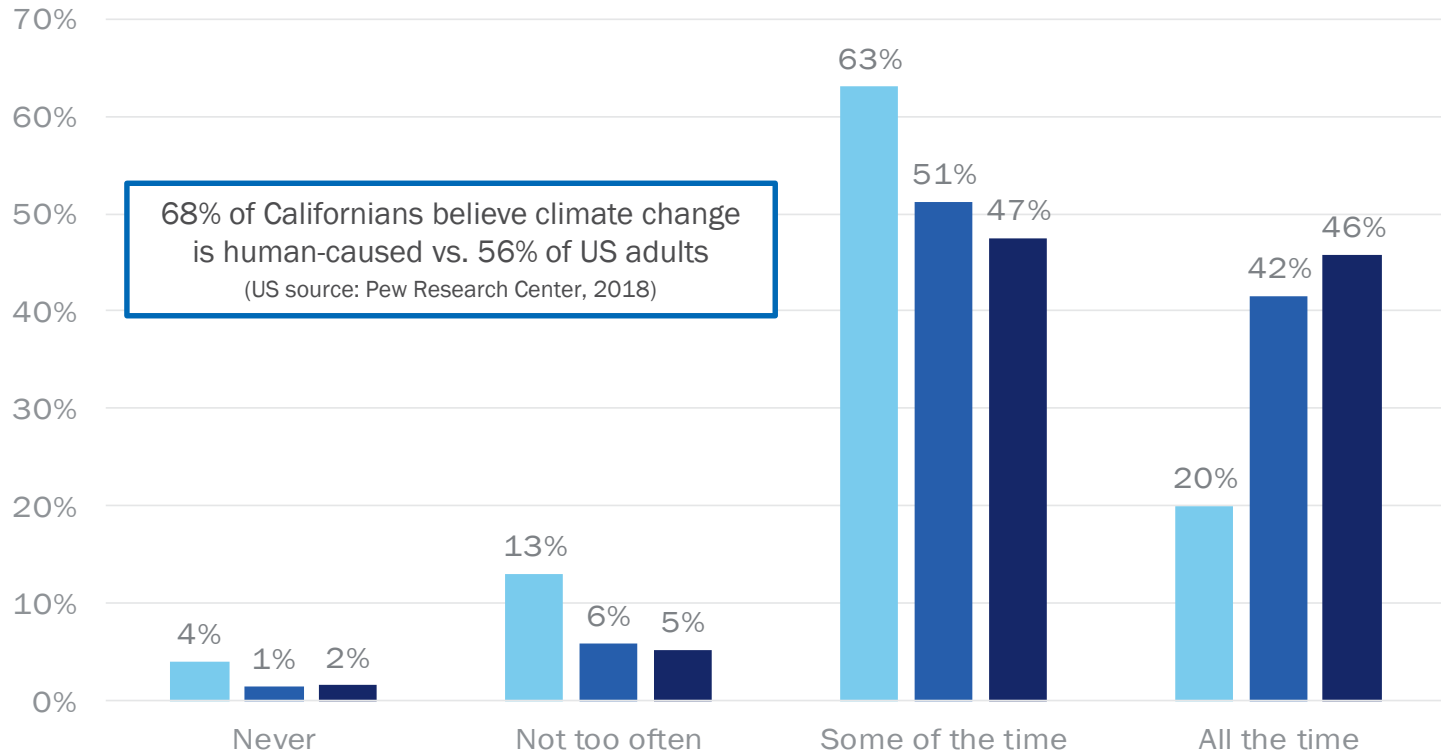
Alignment of Campaign Themes with Californians Beliefs about Energy

Key Finding: Respondents' beliefs align with EUC marketing strategies (beliefs in the importance of climate change and doing their part to make California more energy efficient, Slide 35)



California residents report making an effort to live in ways that help protect the environment more frequently than the US average

How often do you make an effort to live in ways that help protect the environment?

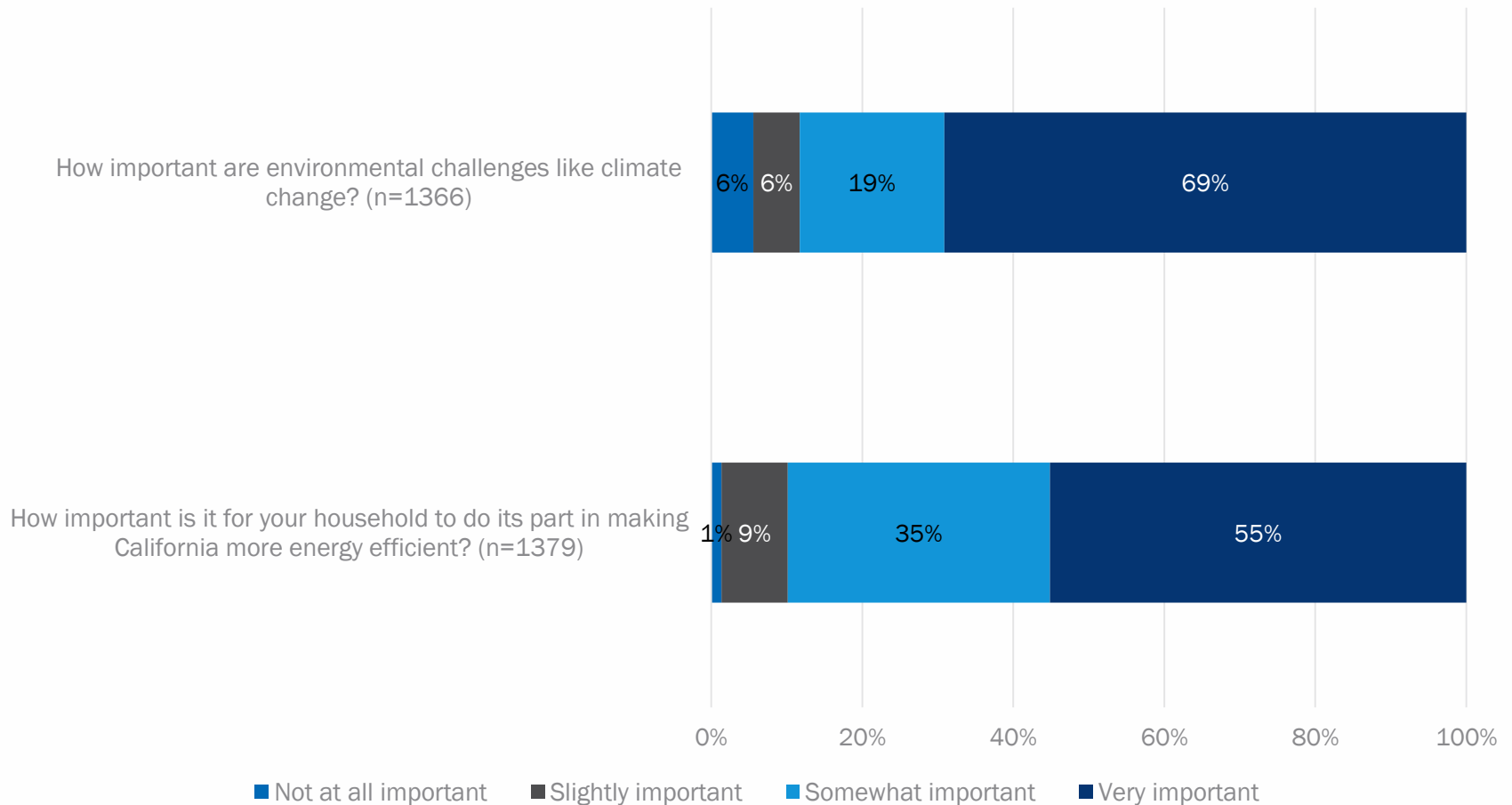


68% of Californians believe climate change is human-caused vs. 56% of US adults
(US source: Pew Research Center, 2018)

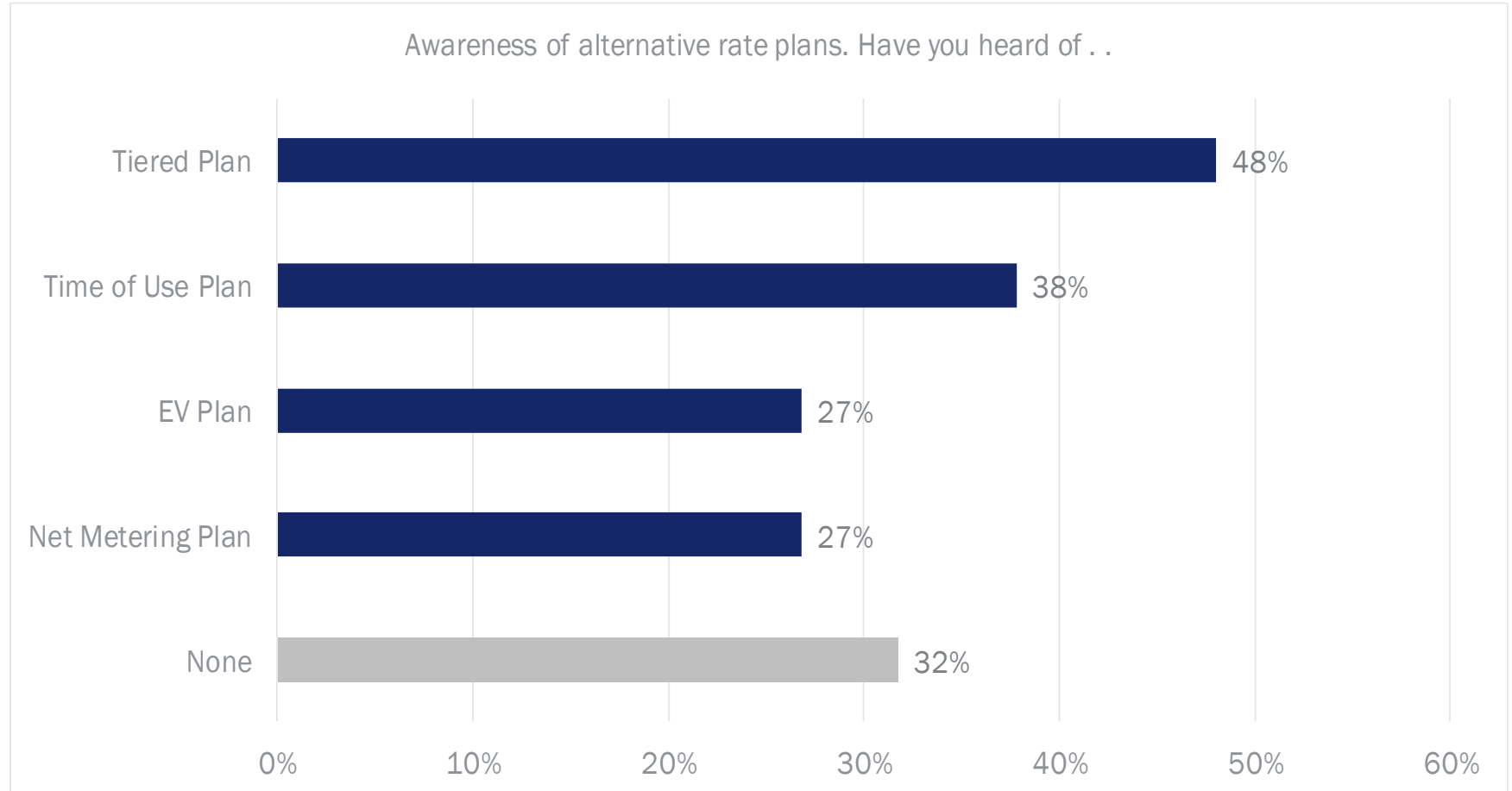
■ US Population (Source: Pew Research Center, 2017) ■ Oct. 2017 (n=1,790) ■ Jun. 2019 (n=1,379)



Most Californians believe climate change is an important challenge and feel they should do their part to make California more energy efficient



Californians struggle to understand different rate plans. One-third don't recognize any of the rate plans. Close to half are aware of a tiered rate plan and slightly over one-third are aware of a time of use plan.

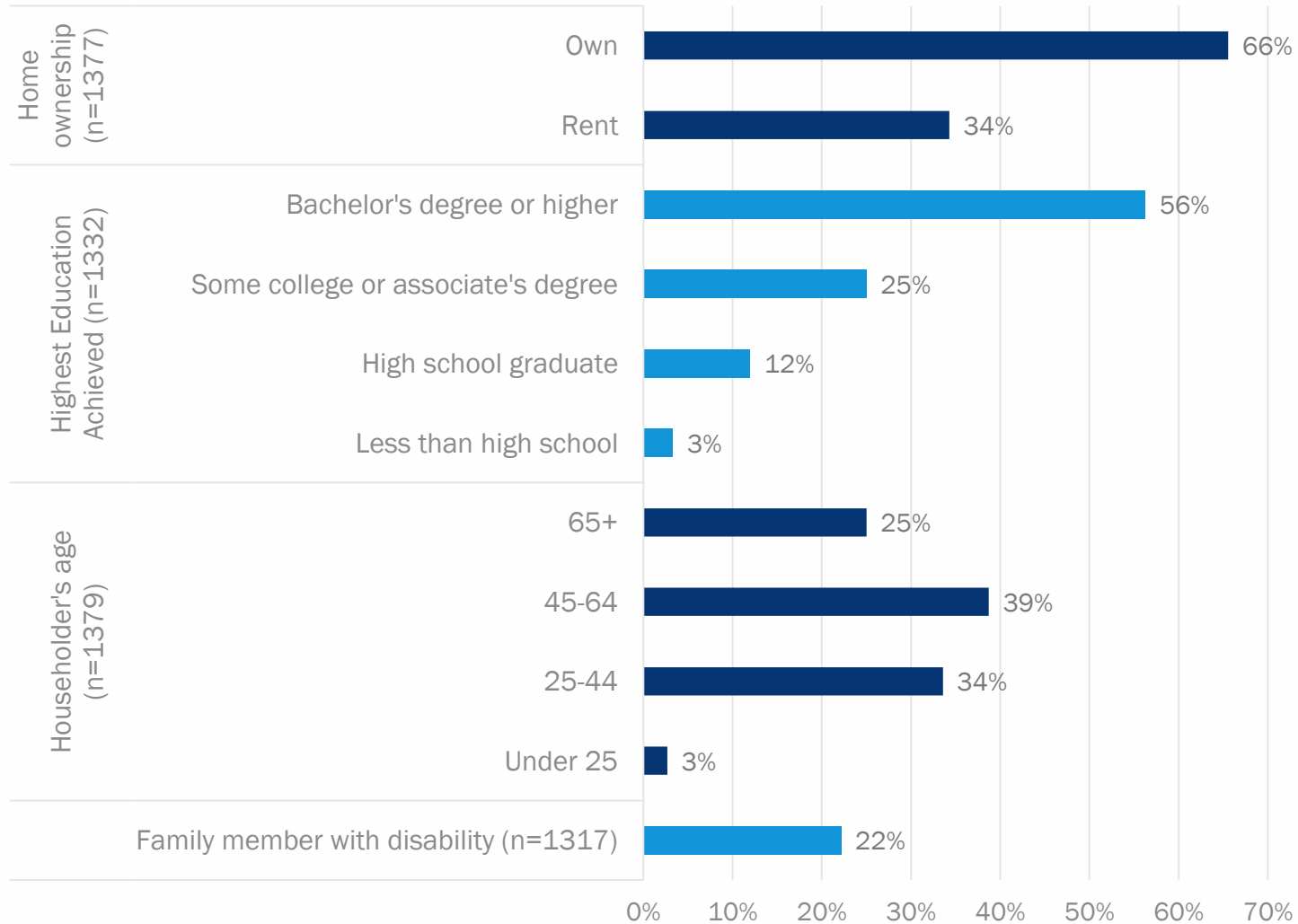


Demographics

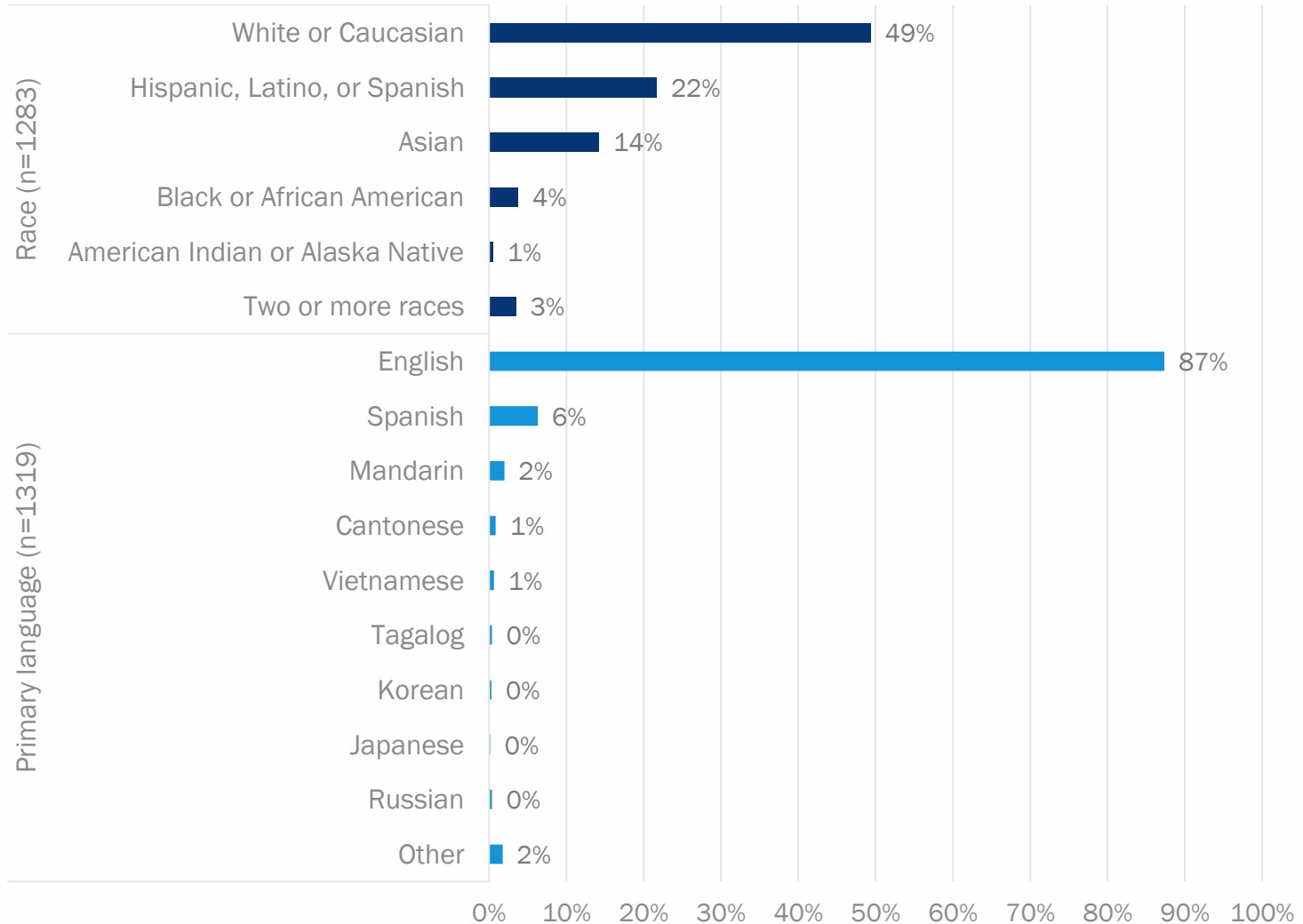
All demographics reported are
unweighted

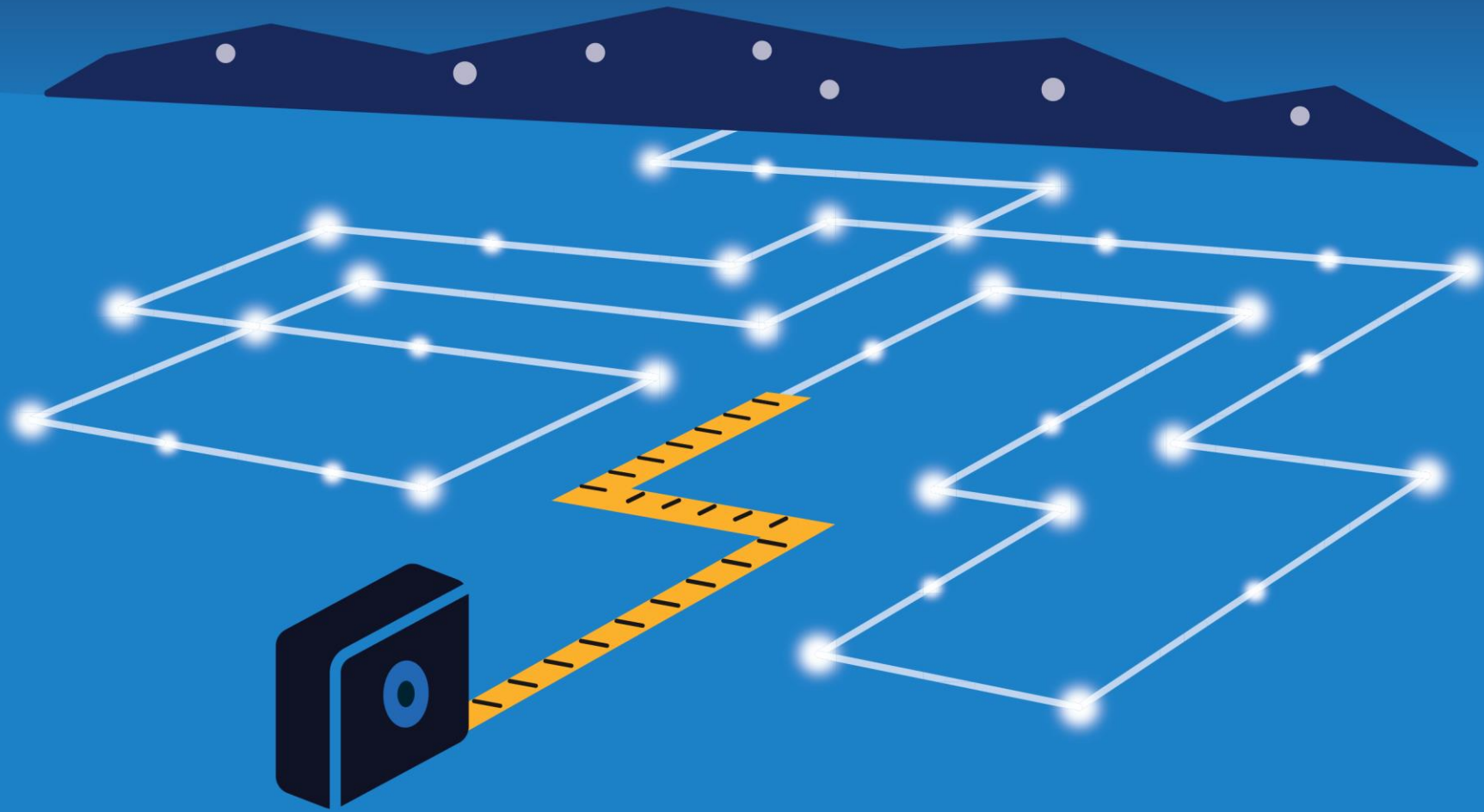


Demographics (Home ownership, Education, Age, Disability)



Demographics (Language and Race)







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