

Statewide Flex Alert Awareness and Response Survey

Baseline Report



May 2009 (Revised November 2009)

Completed by:



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MARKETING DIAGNOSTICS AND STRATEGIES

Background

The Flex Alert campaign has been a part of California's peak demand response portfolio for about 5 years.

- *A Flex Alert is an urgent call for California businesses, governments, and residents to voluntarily reduce their electricity use. The alert is used to prevent Stage 1 Electrical Emergencies - times when the demand for electricity is at its peak, typically during very hot weather.*
- *When an alert is called, all Californians are asked to reduce their use of lighting, adjust air conditioning thermostat to 78° F or higher, and postpone using major appliances until after 7 p.m.*
- *So far, over 40 Flex Alerts have been called since 2004, and Californians shed an estimated 855 megawatts during one of these events when peak demand hit an all time high on July 24, 2006.*



When you hear
a Flex Alert:
Save energy NOW!

- Turn off all unnecessary lights.
- Postpone using major appliances until after 7 pm.
- Turn your air conditioning thermostat up to 78° F.

FLEX ALERT
Save Energy Now!

Objectives

Flex Alert has been funded for 2009-2011. As with other demand management programs, Flex Alert is subject to on-going evaluations.

For 2009, California's IOUs were interested in measuring the impact of the 2009 communications campaign on Californian's (1) awareness, (2) knowledge, and (3) behaviors concerning Flex Alerts, utilizing a pre-season baseline survey and day-after post event surveys.

Objectives of the research included:

- Determine customer awareness and knowledge about Flex Alerts in general*
- Measure customer awareness of specific Alert events, and sources of awareness*
- Identify reactions to an event in terms of specific energy conservation behaviors*
- Understand reasons for not taking action*
- Profile responders and non-responders on demographics and attitudinal variables to identify potential differences*

Methodology

To achieve the objectives, a telephone survey was planned for three survey waves: a pre-season baseline survey and two post-event surveys.

- *No events were called in 2009 so only the baseline was completed.*
- *The survey was completed using randomly generated household telephone numbers (RDD) constrained to match the service territories of California's three electric IOUs: PG&E, SCE, and SDG&E. Note that utility customer databases tend to provide a more representative sample than RDD so are recommended for future waves.*
- *Respondents were screened to ensure they are customers of one of the three IOU's, were 18 years of age or older, and considered themselves a "head of the household"*
- *750 interviews per wave, stratified for 250 interviews per utility.*
- *Total results were weighted to reflect actual household populations in each service territory: 46% PG&E, 42% SCE and 12% SDG&E.*
- *Baseline wave was completed in May 2009*
- *Two post-event waves were planned for day-after two different Flex Alert events during the summer of 2009*
- *Interviews were 12 minutes long*

Methodology

The survey includes the following sections:

- *Recent changes in household electricity use.*
 - *Is the change considered temporary or long-term*
- ***Recall of recent media (any) about conserving electricity***
- ***Awareness of Flex Alert (and other statewide programs)***
 - *Main idea of and familiarity with Flex Alert*
- ***Recall of recent messages about Flex Alert***
 - *Sources of recent awareness*
 - *Actions as a direct result of a recent Flex Alert message*
 - *Identification of sponsor of Flex Alert*
 - *Recalled learning from the Flex Alert message*
- *Best way to inform households about the immediate need to conserve energy*
- *Awareness of energy efficiency programs and resources*
 - *Past participation in energy efficiency programs*
- ***Attitudes about electricity conservation and use***
- ***Media habits***
- ***Household characteristics and electricity use***
- ***Demographics***

Key Measures

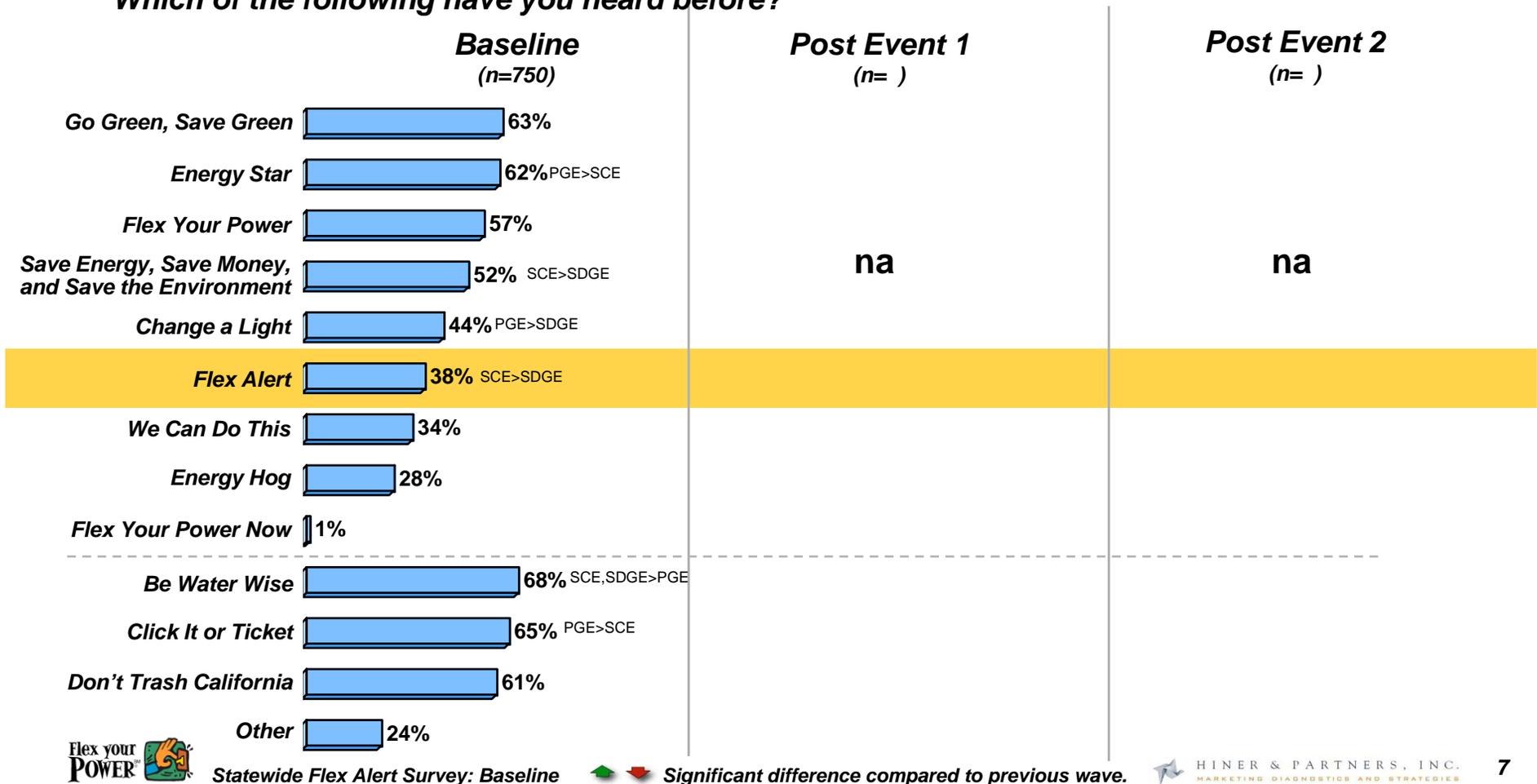
Profiling Info:
Responders and
Non-Responders

2009 Baseline Survey: Partial Results

Awareness of Flex Alert

Aided awareness of *Flex Alert* is at 38%, well below levels for other statewide programs which are in the 60 percent range. *Flex Your Power* is at 57%.

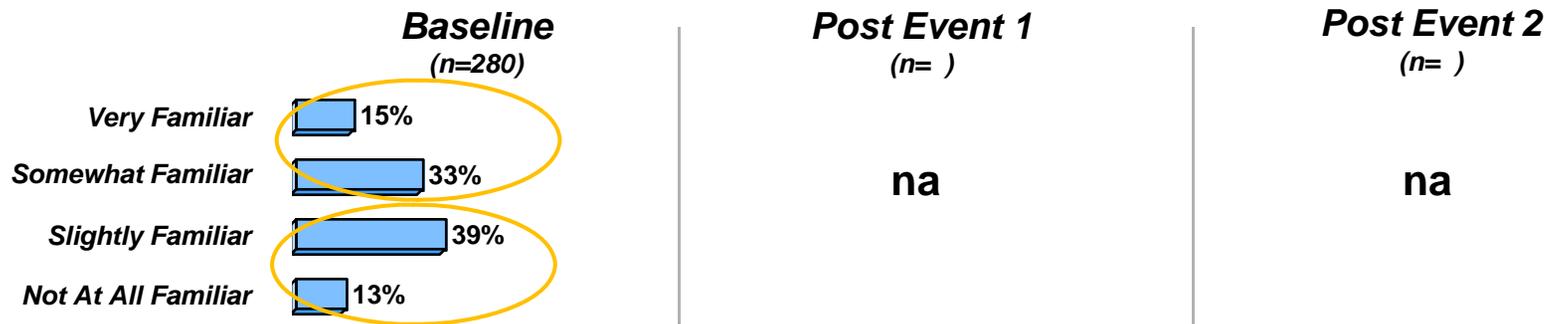
Which of the following have you heard before?



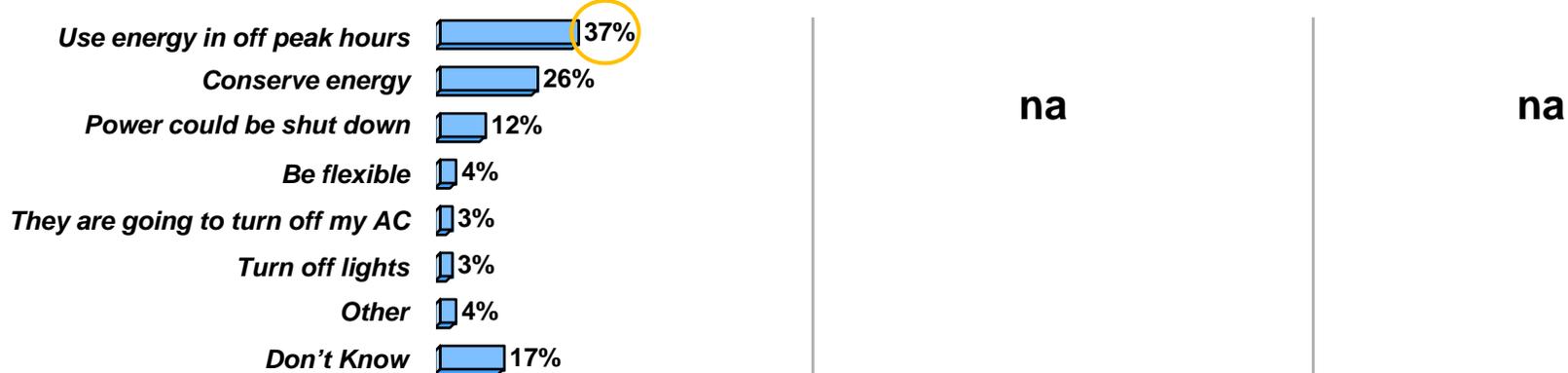
Familiarity with Flex Alert

Among those who are aware of Flex Alert, about half feel very or somewhat familiar while about equal numbers say they are only slightly or not at all familiar. Based on the reported “main idea” of *Flex Alert*, most who are aware of it have an accurate understanding.

(If Aware) How familiar are you with the term Flex Alert?



(If Aware) What do you think is the main idea of the Flex Alert message? (unaided)



Awareness of Flex Alert Messaging

Consumers were also asked if they recalled hearing a message about Flex Alert. A handful, 3%, said they had in just the last week. Since the program is essentially dormant at this time, this represents the level of “false positive” awareness. Most who recalled a recent Flex Alert said they were at home when they heard it.

**Do you ever recall hearing or seeing a message or advertisement about a Flex Alert?
Was this just the past week?**



(Recalled in Past Week)

About how many times do you recall seeing a Flex Alert message in the past week?

Mean	Baseline	Post Event 1	Post Event 2
	2.5	na	na

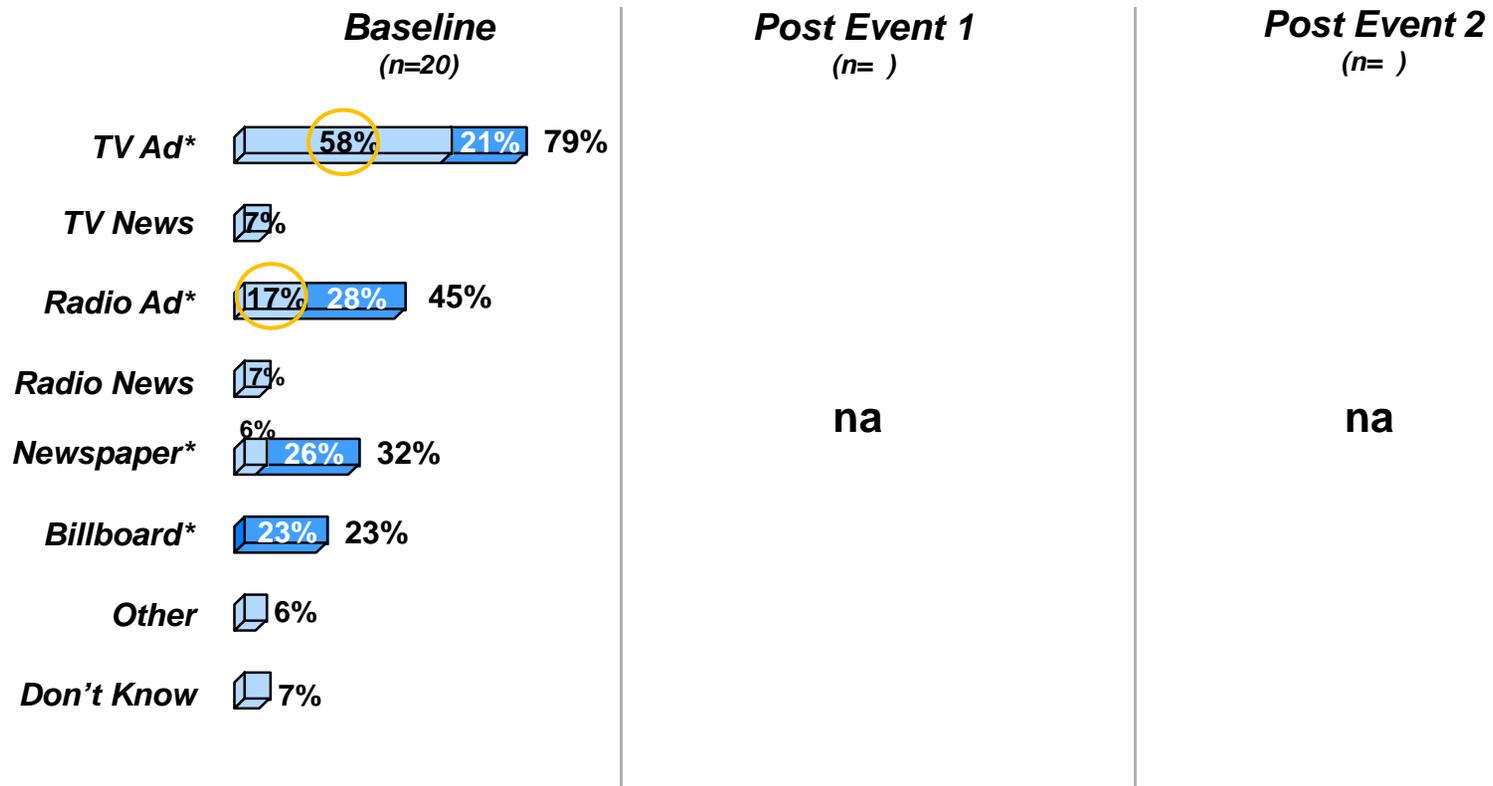
Where were you when you heard the Flex Alert message? (can be multiple locations)



Awareness Sources of Flex Alert Messaging

Recent sources of awareness are reported here. Most (58% unaided) said they heard the message on a TV ad followed by a radio ad (17% unaided). Again, these represent the “false positive” responses, and are based on a small sample size of just 20 respondents.

Where did you see or hear the Flex Alert message this past week?



*Asked unaided and aided. All other unaided.

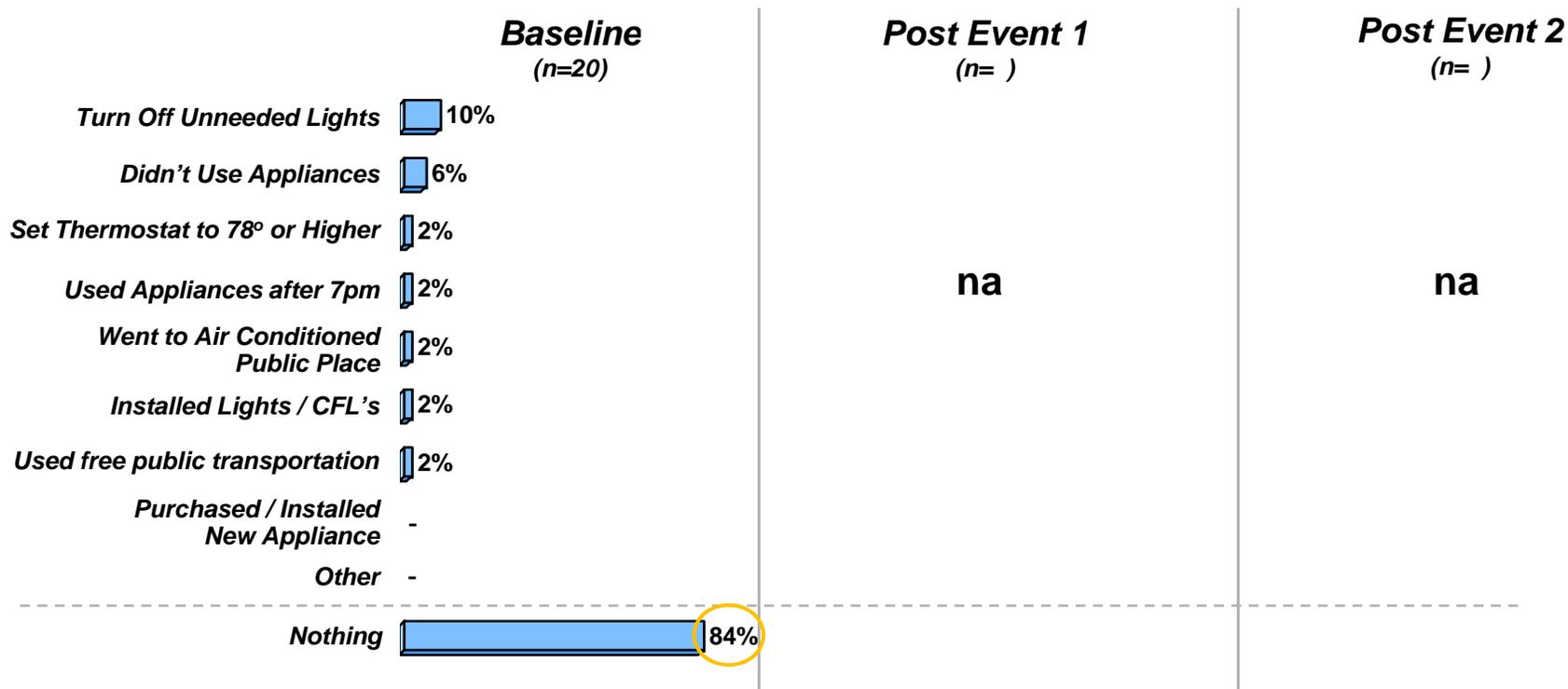
□ Unaided □ Aided



Actions as a Result of Flex Alert

Among those who said they heard a *Flex Alert* in the past week, very few (16%, representing only 3 respondents) said they took any action. This suggests that the *Flex Alert* that consumers recalled was *not* the urgent request to reduce electricity use, but more likely confusion with another campaign.

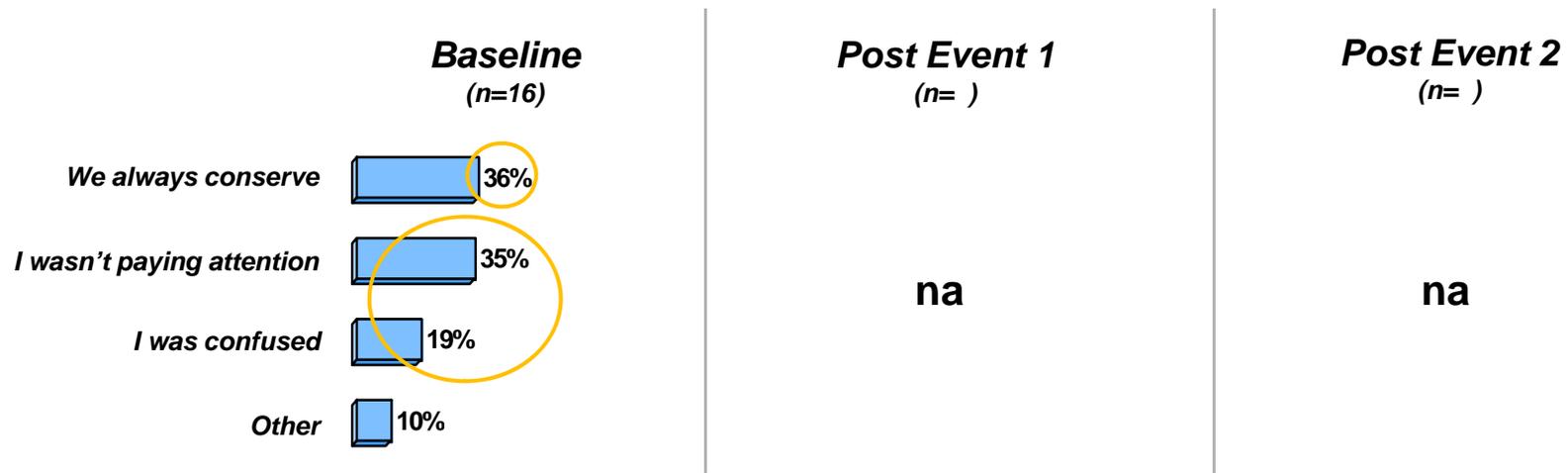
Is there anything you did as a result of hearing a Flex Alert? (unaided, pre-coded responses)



Reasons for Not Taking Action

Reasons for not taking action as a result of hearing a recent *Flex Alert* suggest that most who recalled this alert were unsure about it. About one in three (36%) said they always conserve so apparently did not think of anything else to do for the event.

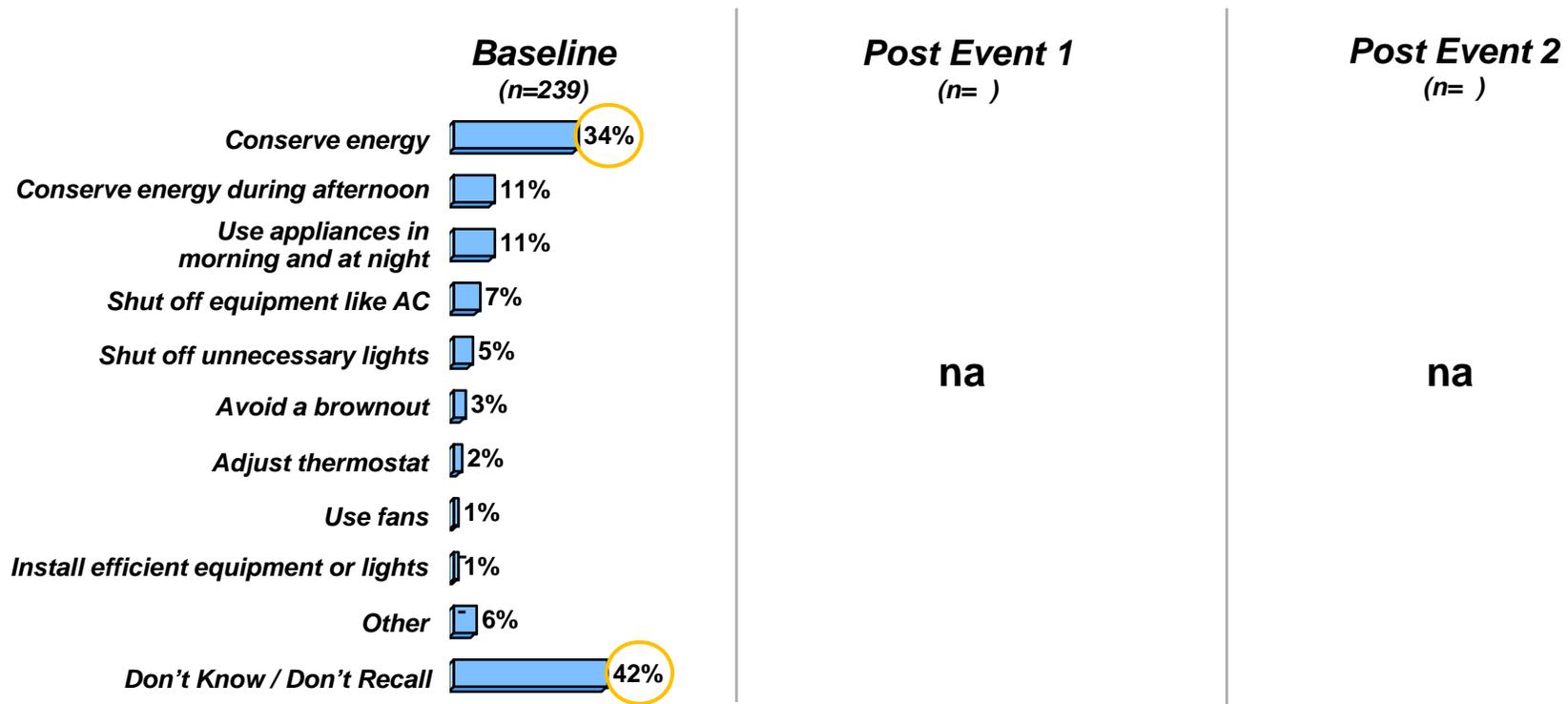
Why did you not take any action for the recent Flex Alert? (unaided)



Recall from the Flex Alert Message

All who said they have heard of *Flex Alert* (not just in the past week) were also asked what they recalled about it. Almost half (42%) said they did not recall anything about it, though the responses from the rest are clearly on track regarding *Flex Alert*'s purpose.

What do you recall learning from the Flex Alert message? (unaided, pre-coded responses)



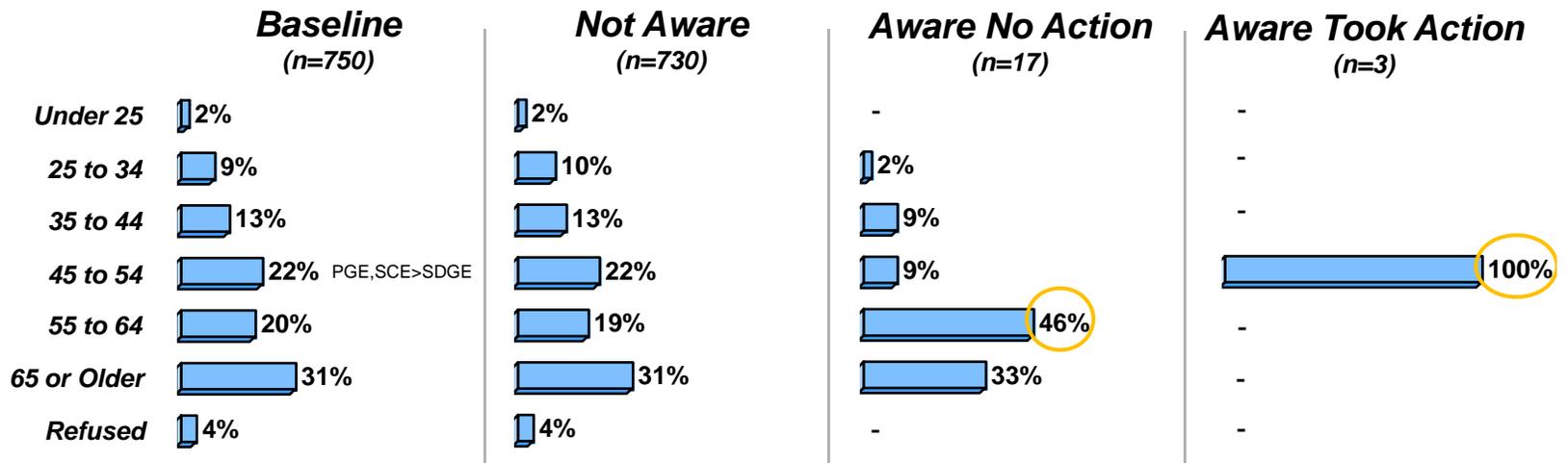
Responder Profiles

Demographic and Energy Usage Profiles

For illustrative purposes, responders and non-responders are profiled on the variables below. Program marketing can use this information to adjust media targeting.

What is your age?

Aware Flex Alert in Past Week



What was your average monthly electric bill last summer?

	Baseline	Not Aware	Aware No Action	Aware Took Action
Mean	\$139	\$140	\$111	\$101
Median	\$100	\$100	\$80	\$80

Conclusions

- ***Over 40 Flex Alerts have been called in the past 5 years implies continued opportunity to shed kW***
- ***While we did not have Flex Alerts in 2009 so could not measure its effects, we suggest conducting these post-event surveys to determine:***
 - ***Were electricity consumers aware of the Flex Alert?***
 - ***Did they take any actions to reduce their demand?***
 - ***If not, why not?***
 - ***Who responded? Who didn't respond? (So program marketing make adjustments to messaging and media)***