PROCESS EVALUATION OF THE 2004 / 2005 FLEX YOUR POWER NOW! STATEWIDE MARKETING CAMPAIGN

FINAL INTEGRATED REPORT

Volume I: Report

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Submitted by:

OPINION DYNAMICS CORPORATION

Process Evaluation of the
2004 / 2005 FYP NOW! Campaign

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Process Evaluation of the 2004 / 2005 FYP NOW! Campaign

1 EXECUTIVE SUMMARY

1.1 Program Overview and Background

Flex Your Power NOW! (FYP NOW!) is a voluntary conservation program created and managed in partnership by the IOUs, Flex Your Power, and the California Independent System Operator (CAISO) to help reduce peak demand. The program implementer is McGuire & Company. FYP NOW's! media campaign began in 2004 as a way to alert consumers about the need for peak load reduction. The campaign is intended to notify Californians to immediately reduce their electricity consumption by following specific conservation and load-shifting measures when electricity demand is high and supplies of electricity low.[1]

The FYP NOW! campaign was originally called "Power Down" in early 2004. The Governor of California held an energy summit on July 27, 2004, launching the Flex Your Power NOW campaign,[2] renamed as such in order to leverage the existing Flex Your Power campaign. The statewide FYP NOW! campaign is intended to target all customers in California using various media (radio, print, website, email, written material) to encourage them to reduce energy usage during peak periods and to provide them with actions on how to reduce demand.[3]

Within the campaign, the actual events calling for demand reduction during peak periods have been called several names: FYP NOW! Power Watch, Power Watch, FYP NOW! Day, and FYP NOW! Alert, as well as the original Power Down.

According to interviews with program administrators, the primary reason for merging a demand response message with Flex Your Power's energy efficiency focus was to leverage resources, drawing on the name recognition of the FYP campaign and the ability to piggyback onto existing FYP media buys It does this by combining energy messages and adding the FYP NOW! message on the tail end of the FYP advertisements.

In 2005, the budget for the FYP NOW! campaign was $7.5 million. McGuire and Company reports that 81% of the budget went to media outlets, with 43% in radio, 22% in newspapers, and 16% in television. Grey Worldwide, the advertising agency for FYP, created the media spots and decided the specific media buys. FYP NOW! messages were typically tacked on to existing FYP ads to capitalize on the existing FYP brand and leverage the budget; this strategy was intended to increase the reach and frequency with which the FYP NOW! messages were run. In general, FYP NOW! messages were approximately five-second tag lines added to the FYP

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1 It should be noted that the program information and history presented here has been compiled mainly from depth interviews with program staff and administrators (utility representatives, implementing contractor, and advertising/research subcontractors) and CPUC filings, and as such may not be totally accurate or complete. The lack of program theory development and historical documentation provided to the evaluation team on the FYP NOW! campaign complicates understanding of the program process and goals.

2 www.cpuc.ca.gov/word_pdf/FINAL_RESOLUTION/39284.pdf

3 www.cpuc.ca.gov/published/Final_decision/44881-04.htm

advertisement, although some radio ads promoted solely FYP NOW! (sponsored radio traffic report spots are 10 and 15 seconds long). Although tagging the FYP NOW! message onto FYP messages saves money and leverages funding, it appears to be ineffective in creating a distinction between the general FYP messages and the specific FYP NOW! messages.

1.2 Study Objectives

Opinion Dynamics Corporation (ODC) conducted an evaluation of California's FYP NOW! marketing outreach campaign to understand how the program operates and if it is successful in achieving its goals. The primary objectives of ODC's research were to:

- Determine if consumers' comprehension of the advertising is consistent with "stated" program strategy and assess the advertising's influence on their energy consumption behavior in general and their peak consumption behavior in particular
- Document the level of viewer and/or reader recall of the Program
- Provide a quantitative measure of educational effects of the Program
- Document any actions taken as a result of the Program

A key component to this evaluation involved isolating awareness of, and customer response to, the FYP NOW! messaging from the awareness and effects of the more encompassing Flex Your Power suite of programs and efforts. All research instruments including survey instruments, interview guides, and discussion guides for focus groups were created with this objective in mind. As such, each instrument was designed in an attempt to identify and quantify levels of awareness and program effects directly attributable to the FYP NOW! campaign independent of the influence of any other programs.[4] ODC's research employed an integrated approach, utilizing qualitative findings to devise questions for quantitative efforts.

Altogether, these efforts feed into our final assessment of program performance and recommendations for program improvements. The overall goal of this process evaluation is to be able to use the information to "tell a story" about how the program is operating and where there are additional opportunities for improvement. In aggregate, the full evaluation becomes its most useful through this in-depth examination of findings, overall results, and areas of differences. To this end, our final report provides direct quotes to illustrate the quantitative findings and qualitative analysis as well as to support the recommendations provided.

1.3 Evaluation Methods

The following data collection methodologies were employed as part of the primary data collection efforts for this evaluation. These are discussed in further detail below.

- **In-depth interviews** with Program managers and administrators, including utility representatives and/or implementers, project staff from Research 360, the FYP advertising agency, and McGuire and Company.

[4] However, due to the co-mingling of campaign messages and program funding, it was sometimes impossible to separate the program efforts and results of the FYP program from that of the FYP NOW!.

- A **baseline awareness survey** with California residents. A survey of a statistically representative sample of 1,200 residential customers, 400 interviews in each of the three participating electric utility territories (PG&E, SCE, and SDG&E).
- Six **focus groups** with residents across the State. Participants were randomly recruited. Participants were recruited using screening questions designed to identify the household member responsible for paying electric utility bills and central air conditioning ownership. The goals of these sessions were to provide a forum for understanding what messaging might work best for FYP NOW! and also to determine how to best differentiate FYP NOW! from Flex Your Power. Information obtained was valuable in developing the questions and the wording of our process evaluation and program effects survey instrument.
- A **process evaluation and program effects survey** with California residents. ODC conducted a survey with a statistically representative sample of customers (N=1,200; 400 for each IOU).
- A **web-based Internet survey** for the FYP e-newsletter distribution list. E-mail invitations were sent to all e-Newswire subscribers. The survey looked at issues such as usefulness and satisfaction with the e-newsletter, along with actions taken due to this publication.
- **Review of the FYP website**, fypower.org

All research instruments utilized in our primary data collection efforts benefited from the results of our review of existing Program materials and previous research. Depth interviews with program staff provided key information on process "flow" issues, program design, objectives, implementation, and administration. We also used these interviews to create questions to test assumptions that arose during the interviews, as well as to determine the program's strengths and weaknesses as seen from the implementing party's perspective.

Our focus groups with customers provided detailed qualitative information regarding how customers became aware, effective advertising messages, and specific actions customers have taken or would consider taking in response to program messages.

The baseline awareness survey was used to assess levels of program awareness and message recall among a random sample of California residents.

The findings from each previous component of our research supported the development of the process and program effects survey questionnaire. The process survey results gathered quantitative data on the messaging of FYP NOW! and insights into potential future messaging, as well as changes in behavior attributable to these program messages. The process/program effects survey differed from the baseline awareness survey by delving further into reasons for the levels of awareness and into understanding the gap between awareness of the FYP efforts and the FYP NOW! efforts, as well as probing more deeply into how respondents receive the marketing messages and actions taken as a result of the information obtained through the FYP and FYP NOW! media efforts.

The final stage of our research included the evaluation of the FYP web site and e-Newswire newsletters (the latter through an internet survey of e-Newswire subscribers) to assess the level of support FYP NOW! receives through FYP materials.

Altogether, these efforts feed into our final assessment of program performance and recommendations for program improvements. The overall goal of this process evaluation is to be able to use the information to "tell a story" about how the program is operating and where there are additional opportunities for improvement. In aggregate, the full evaluation becomes its most useful through this in-depth examination of findings, overall results, and areas of differences. To this end, our final report not only provides quantitative findings, but also provides direct quotes and other qualitative findings in order to add richness and perspective to the data collected, and support for the recommendations provided.

1.4 Key Findings

Our key findings, along with recommendations, from this evaluation follow below:

1. A large percentage of survey respondents indicated that they had seen a FYP NOW! alert on television: 75% of those who said they saw the alert indicated that they saw the notice on TV, while 31% said they heard it on the radio. Since the program conducted most alerts via radio, we believe that many consumers were not able to differentiate between FYP NOW! commercials on television from the FYP NOW! alerts. Focus group participants also had difficulty distinguishing the difference between a FYP NOW! advertisement spot and the FYP NOW! alert.

Recommendation: To reduce confusion, it is important that the advertising messages and collateral distinguish general "education" about the possibility of upcoming alert days from the alerts themselves. In particular, consumers should be told when and where they should expect to hear/see an alert, and what form that alert will take. Focus group results revealed that participants had difficulty distinguishing between the general ads and the alerts; and survey results indicated suspiciously high numbers for alert recognition.

Part of the problem seems to be the similarity of the "Flex Your Power" and "Flex Your Power NOW!" slogans, especially considering that prior year FYP messages identified peak load reduction as a primary goal. The nuance of FYP NOW! To focus on specific days appears to have been lost to the customers. The second major problem seems to have been the choice of medium for the alert ads. The future campaign should work to broaden the audience for alerts to the same medium as is used for the education component and focus on overcoming the logistical barriers to the late notice provided. Focus group respondents suggested that they would expect to see alerts on the evening news, in the morning paper, or as a news crawl at the bottom of the TV screen—not unlike "Spare The Air" notices.

Also, run more alerts on television since more customers indicate getting their information by television (currently, FYP NOW! alerts are primarily distributed through radio, while education-focused FYP NOW! media buys can be in the form of television, radio, or newspaper ads).

Some program administrators mentioned the difficulty in changing out television ad spots quickly, so we recommend instead having the alert notice formatted onto a scrolling banner or news crawl that runs along the bottom of the television screen. This scrolling banner should note the specific actions customers can take to reduce electricity usage, as well as the time period to take the actions.

2. Customers were not clear about where and how the actual alerts were to be communicated as indicated in focus groups. The 2004 / 2005 advertisements did not educate customers on the reason for the alert day (i.e., demand was high, reserves were low)

Recommendation: Provide information in regular advertisements about why peak reduction is important and where customers can expect to see notifications of alerts. Note this will also help reduce consumer confusion over an alert versus an advertisement.

3. Californians understand the actions they need to take to conserve energy, but they did not necessarily associate the message to be time sensitive, such as an immediate need to conserve energy.

- 12% of all Californians say they recall FYP NOW! messages (aided). When compared to other energy messages and programs, customers are more aware of the national ENERGY STAR campaign and other utility company taglines.
- Of all Californians, approximately 10% say they shut off at least one piece of electricity consuming equipment as a response to an alert they say they heard, and the actions reported are generally consistent with those in the advertisements (e.g.., turning off or shifting use of appliances, turning off lights, using ceiling fans instead of air conditioning). However, the confusion between alerts and advertisements leads us to believe that many consumers who took action did so at a time when an FYP NOW! day was not in effect.
- Customer comprehension of the *intended* message of FYP NOW! is less clear. Customers are generally aware that the messages are energy related (see bullet point above), but are not always aware of the specifics of the message. When customers hear the term "Flex Your Power NOW!," only 12% of respondents associate this with a message that is time sensitive, such as an immediate need to conserve energy, or related to taking action during peak times. Furthermore, many focus group participants misunderstood the word "NOW!" to mean from here on out or do it right now.

Recommendation: Modify the FYP NOW! advertisements so that they: clearly distinguish between alerts and ads, provide customers a reason for alert issuance, and encourage customers to go beyond the immediate action and enroll in programs.

4. Advertising that focuses on two different key take-aways, one regarding energy efficiency and the other involving conservation, in one message creates confusion among the targeted audience.

Recommendation: Alternate ads – based on energy demand periods – with some ads dedicated solely to FYP NOW! peak demand messaging and others focused on FYP energy efficiency to help distinguish between the two messages. Although customers may not necessarily be able to identify the two messages (FYP and FYP NOW!) because they sound so similar, focusing efforts

on FYP NOW! during high demand times will help customers take the desired energy-reducing actions during peak periods.

Another option to explore in the future is reverting the FYP NOW! campaign name to its original name "Power Down," which has a clearer message, but continue to implement under the FYP brand so that it receives the name recognition. Future focus groups should explore this possibility.

5. Only 2% of those who visit the FYP website, *fypower.org*, visited the FYP NOW! pages of the website. Of the approximately 350,000 website hits, this equates to only 7,000 visitors to the FYP NOW! portion of the site.

Recommendation: Update the FYP website to better promote FYP NOW!, by adding more timely materials and information and by making the FYP NOW! site pages more useful, especially to residential visitors.

More detailed findings and recommendations are provided in Section 3.

2 INTRODUCTION OF FYP NOW! PROCESS EVALUATION EFFORTS

2.1 Program Background and Goals

This study looks at Flex Your Power Now! (FYP NOW!) level of performance with respect to achieving the program objectives of 1) raising awareness of the FYP NOW! Campaign, and 2) getting customers to voluntarily reduce their electricity usage during peak periods. The next section provides the goals for this evaluation study of the FYP NOW! campaign. Observations and recommendations for improving program design and implementation have also been included as an integral part of this evaluation effort.[5]

This report presents the results of an integrated process evaluation conducted by Opinion Dynamics Corporation (ODC) between October 2005 and May 2006 for the 2004 / 2005 Flex FYP NOW! campaign. Because there is no official program theory documentation, we have attempted to capture the history of the program from program administrator interviews and CPUC filings related to FYP NOW!.

The FYP NOW! campaign was originally called "Power Down" in early 2004 and then became a joint utility effort that was included as part of the Flex Your Power program in order to leverage the existing resources and name recognition. The Governor of California held an energy summit on July 27, 2004, launching the Flex Your Power NOW campaign.[6] The statewide FYP NOW! campaign uses various media (radio, print, website, e-mail, written material) to encourage Californians to reduce energy usage during peak periods and provides Californians with actions on how to reduce demand.[7]

According to interviews with program administrators, the primary reasons for merging a demand response message with Flex Your Power's energy efficiency focus was to leverage resources, draw on the recognition of the FYP campaign and piggyback media buys with existing FYP buys.

Within the campaign, the actual events calling for demand reduction during peak periods have been called several names: FYP NOW! Power Watch, Power Watch, FYP NOW! Day, and FYP NOW! Alert, as well as the original Power Down. Using all these different terms may create confusion for the general public.

For 2004/2005, the goals of the campaign are loosely defined. The California Public Utilities Commission (CPUC) filings state that there are no associated impact goals with the FYP NOW! campaign because "*attribution of demand response to media campaigns is difficult and very*

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[5] ODC was not hired until after the program period was almost complete. Consequently, there were no FYP NOW! events conducted during the evaluation time period and very few remaining media events, thus making it difficult to evaluate some aspects of the FYP NOW! program, such as the levels of ad awareness and message recall.

[6] www.cpuc.ca.gov/word_pdf/FINAL_RESOLUTION/39284.pdf

[7] www.cpuc.ca.gov/published/Final_decision/44881-04.htm

expensive."[8] Aside from (the lack of) energy savings goals, other goals for the campaign are not explicit. According to one CPUC document,

> *"The primary goal of "Flex Your Power Now" (FYPN) is to reduce peak period usage during targeted summer days when the State has heightened supply/demand balance concerns. FYPN is targeted at all customers, including residential and small business customers, and relies heavily upon mass media announcements during those targeted summer days"*[9]

The program implementer, McGuire and Company, provides some additional information:

> *Flex Your Power NOW! "notifies California businesses, governments and residents when they should follow specific conservation and load-shifting measures to immediately reduce their electricity use. The CAISO triggers Flex Your Power NOW! days when energy reserves are predicted to come close to or fall below 7%. Flex Your Power, with support from the IOUs and CAISO, educates and motivates Californians to reduce their energy use during peak hours on these days by turning off lights and appliances, raising the thermostats to 78 degrees, and waiting to use major appliances after 7pm."*

2.2 Overview of Evaluation Efforts and Data Collection Strategies

ODC conducted a process evaluation of California's' FYP NOW! marketing outreach campaign to understand how the program is operating and if it is achieving its goals. The primary objectives of ODC's research are to:

- Determine if consumers' comprehension of the advertising is consistent with "stated" program strategy and assess the advertising's influence on consumers' purchase intent/behavior regarding energy-efficient and peak use reduction practices
- Document the level of viewer and/or reader recall of the Program
- Provide a quantitative measure of educational effects of the Program
- Document any actions taken as a result of the Program

A key component of this evaluation involved isolating awareness of, and customer response to, the FYP NOW! messaging from the awareness and effects of the more encompassing Flex Your Power suite of programs and efforts. We designed all of our research instruments including all survey instruments, interview guides, and discussion guides for focus groups with this objective in mind. As such, each instrument was designed in an attempt to identify and quantify levels of awareness and program effects directly attributable to the FYP NOW! campaign independent of the influence of any other programs.

ODC's research employed an integrated approach, employing qualitative findings to devise questions for quantitative efforts.

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8 www.cpuc.ca.gov/published/Final_decision/44881-04.htm

9 www.cpuc.ca.gov/static/hottopics/1energy/draft+dr+load+impact+protocols+appendices+a+and+b+april+3+2006.doc

The first stage of this approach included the project initiation meeting, attendance at the customer focus groups moderated by Research 360 Inc., and a comprehensive review of existing program materials and secondary research including the following materials:

- The detailed report of Flex Your Power Focus Groups completed in December 2004 by Flexo Hiner & Partners
- Analysis of marketing materials, customer brochures, and other data collected during visit to the FYP offices of McGuire and Company
- All radio and television message campaign materials
- Any prior studies completed by Research 360 Inc.

The product of this initial phase was used to inform the development of all research instruments used to assess program awareness and performance. Additional material and secondary review was conducted throughout the evaluation. For example, ODC reviewed existing program advertising materials and messages in an effort to support the development of survey questions designed to measure message recall, the educational value of the messages, and actions taken in response to Program messages.

The following data collection methodologies were employed as part of the primary data collection efforts for this evaluation. Table 2.2-1 provides a summary of the primary research data collection efforts with numbers of targeted and actual completes, and we provide more detail on these efforts below Table 2.2-1.

- **In-depth interviews** with Program managers and administrators, including utility representatives and/or implementers, project staff from Research 360, the FYP advertising agency, and McGuire and Company.
- A **baseline awareness survey** with California residents. A survey of a statistically representative sample of 1,200 residential customers, 400 interviews in each of the three participating electric utility territories (PG&E, SCE, and SDG&E).
- Six **focus groups** with residents across the State. Participants were randomly recruited. Participants were recruited using screening questions designed to identify the household member responsible for paying electric utility bills and central air conditioning ownership. The goals of these sessions were to provide a forum for understanding what messaging might work best for FYP NOW! and also to determine how to best differentiate FYP NOW! from Flex Your Power. Information obtained was valuable in developing the questions and the wording of our process evaluation and program effects survey instrument.
- A **process evaluation and program effects survey** with California residents. ODC conducted a survey with a statistically representative sample of customers (N=1,200; 400 for each IOU).
- A **web-based Internet survey** for the FYP e-newsletter distribution list. E-mail invitations were sent to all e-Newswire subscribers. The survey looked at issues such as usefulness and satisfaction with the e-newsletter, along with actions taken due to this publication.
- **Review of the FYP website**, fypower.org

Table 2.2-1: Sampling Frame and Actual Completes for Primary Research

	Targeted	Actual
Baseline awareness telephone survey • PGE • SCE • SDG&E	1,200 (400 per IOU)	1,201 • 400 • 401 • 400
Focus groups	6 (2 per IOU)	6
Process evaluation and program effects telephone survey • PGE • SCE • SDG&E	1,200 (400 per IOU)	1,203 • 403 • 400 • 400
Web survey for FYP e-Newsletter	--	129

It should be noted that these program components often target multiple sectors. Since the program implementer, McGuire and Company, did not have energy or expenditure goals by sector (such as residential, business, state and local governments), our research did not focus on understanding the effect of the program by sector.

As noted above, all research instruments utilized in our primary data collection efforts benefited from the results of our review of existing Program materials and previous research. Depth interviews with program staff provided key information on process "flow" issues, program design, objectives, implementation, and administration. We also used these interviews to create questions to test assumptions that arose during the interviews, as well as to determine the program's strengths and weaknesses as seen from the implementing party's perspective.

Our focus groups with customers provided detailed qualitative information regarding how customers became aware, effective advertising messages, and specific actions customers have taken or would consider taking in response to program messages.

The baseline awareness survey was used to assess levels of program awareness and message recall among a random sample of California residents, as well as to assess comprehension of the campaigns' messages.

The findings from each previous component of our research supported the development of the process and program effects survey questionnaire. The process survey results gathered quantitative data on the messaging of FYP NOW! and insights into potential future messaging, as well as changes in behavior attributable to these program messages. The process/program effects survey differed from the baseline awareness survey by delving further into reasons for the levels of awareness and into understanding the gap between awareness of the FYP efforts and the FYP NOW! efforts, as well as probing more deeply into how respondents receive the marketing messages and actions taken as a result of the information obtained through the FYP and FYP NOW! media efforts.

The final stage of our research included the evaluation of the FYP web site and e-Newswire newsletters (the latter through an internet survey of e-Newswire subscribers) to assess the level of support FYP NOW! receives through FYP materials.

Altogether, these efforts feed into our final assessment of program performance and recommendations for program improvements. The overall goal of this process evaluation is to be able to use the information to "tell a story" about how the program is operating and where there are additional opportunities for improvement. In aggregate, the full evaluation becomes its most useful through this in-depth examination of findings, overall results, and areas of differences. To this end, our final report not only provides quantitative findings, but also provides direct quotes and other qualitative findings in order to add richness and perspective to the data collected, and support for the recommendations provided.

2.3 Campaign Background and Goals

Although we originally intended to distill customer awareness and program effects of FYP NOW! messaging versus the larger FYP campaign, ODC's initial research showed that the FYP NOW! program cannot be evaluated in total isolation. Understanding the Flex Your Power program's goals and operations is critical to understanding the success of FYP NOW!. The **FYP** goal, as stated in the 2004 PIP filed by the McGuire and Company is "*to overcome remaining market barriers to energy efficiency in California by maintaining the momentum of the campaign's success in building awareness; leveraging resources of California's program providers and other EP partners; and providing statewide support to IOU and third party programs.*" [10]

To meet these goals the following components are included in the FYP program:

- Advertising across various media (TV, radio, newspapers, etc)
- FYPower.org Website
- FYP e-newsletter (distribution ~ 12,000)
- Outreach Activities (2005 Summer Executive Forums, tradeshows)
- Materials, brochures, etc.

During our interviews with McGuire and Company, it was determined that FYP NOW! funds – approximately $6.2 million to McGuire and Company in 2005[11] - are spread across **all** of these program components. Over 80% of the FYP/FYP NOW! expenditures are dedicated to advertising and marketing activities.

[10] *Program Implementation Plan for 2004-05 Flex Your Power Coordinated Statewide Marketing and Outreach Program*, submitted to Efficiency Partnership, 17 February 2004

[11] The entire FYP NOW! budget - funded by utility ratepayers was $7.5 million for 2005, of which $1.3 million was earmarked for the IOUs; while $6.2 million went to the Efficiency Partnership (FYP). A further breakdown of this budget is provided in Section 4.

3 SUMMARY OF KEY FINDINGS AND RECOMMENDATIONS

This section presents an overview of the key findings from our evaluation of FYP NOW!. These findings draw on the numerous primary and secondary data collection tasks that ODC conducted for the process evaluation, described in Section 2.2.

3.1 Summary of Findings

The primary objectives of this research were to:

- Determine how well the campaign has reached the target audience
- Determine if consumers' comprehension of the advertising is consistent with "stated" program strategy
- Assess the advertising's influence on consumers' purchase intent/behavior regarding energy-efficient and peak use reduction practices and
- Document any actions taken as a result of the Program.

We answer these questions below.

How well has the campaign reached the target audience? What is the level of recall?

Based on our baseline study, 12%[12] of IOU customers state that they recall (aided) hearing or seeing the "FYP NOW!" advertisements. As mentioned above, however, recall of messages from FYP and FYP NOW! campaigns is often melded together resulting in the need to evaluate the FYP NOW! campaign, not in isolation, but rather at times in tandem with the FYP effort.

After describing specific FYP and FYP NOW! ads without revealing either campaign name (e.g., offering a description of the tortoise trying to turn out a light bulb) in our process evaluation and program effects survey, 50% of respondents could recall (with prompting) at least one television commercial or radio advertisement (out of six radio and TV ads in 2005)[13]. In total, 36% of consumers recall at least one message or ad from the combined campaigns.

When compared to other energy messages and programs, customers are more aware of the national ENERGY STAR campaign and utility company taglines, but aided familiarity with FYP NOW! is high relative to other utility programs (such as 10/20, 20/20, and AC Cycling/Summer Discount, Summer Savers).

Is consumers' comprehension of the advertising consistent with "stated" program strategy?

Customers are generally aware that the messages are energy related, but are not always aware of the specifics of the message. Overall, for nearly two-thirds of the population, the term "Flex Your Power NOW!" alone does not convey any message—65% percent of the population could not associate the term with any message.

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[12] 15% in the process evaluation and program effects survey.

[13] An additional three radio commercials were developed in Spanish and aired on Spanish-language radio stations.

In general, when customers hear the term "Flex Your Power NOW!," only 12% of the population associates this with a time sensitive message such as an immediate need to conserve energy, or a message related to taking actions during peak periods. Most other respondents associated it with another message—such as a more general energy efficiency or general conservation message.

What is the advertising's influence on consumers' purchase intent/behavior regarding energy-efficient and peak use reduction practices?

If heard, the FYP NOW! messages in their entirety (i.e., not just the tag line) seem to have an effect at getting customers to take energy-related actions. Of all Californians, approximately 10% say they shut off their energy usage as a response to the alert they heard. However the timing of these actions does not always correspond to the goals of the program. Due to confusion regarding advertisements versus alert notification, many customers are not taking the desired actions during critical peak periods.

What (types of) actions have been taken as a result of the Program?

Of those customers that report taking actions, most report shutting off unnecessary appliances or electric equipment, followed by turning off lights. Other actions that were mentioned include shifting use of an appliance to the early morning or at night, and taking actions to reduce cooling load such as tuning down the thermostat, using fans or pulling shades. It should be noted that these actions reported by customers are generally consistent with those in the advertisements (e.g.., sea lion and appliance, tortoise and light bulb, frog and ceiling fan).

3.2 Key Findings by Research Task

Below we present additional findings by research task. Our detailed findings from each of the evaluation tasks are described in the next section (Section 4).

Process Findings

- Campaign goals and objectives of FYP NOW! do not appear to be officially defined in much detail. However, all program staff understand that the program goal is to reduce the demand on the system on certain days by encouraging all customers to voluntarily stop using electricity during peak hours on critical days
    - Some program staff feel that these goals are clearly defined to the general public
    - There is a concern among some staff that including fuel and water as part of the FYP campaign – with their own similar logos - is diluting the effectiveness and recognition of the FYP NOW! efforts

- During program inception, the Team approach among administrators helped to leverage FYP NOW! funds with FYP program in terms of funding, delivery, messaging, and brand recognition. Good coordination among the team resulted in delivering consistent savings measure messages to customers (turn out unnecessary lights/appliances, set thermostat to 78 degrees, and use appliances after 7pm).

Baseline Awareness, Knowledge and Action Findings

- Almost all respondents are unable to recall any efforts, *unaided*, in California designed to help conserve energy and save money (awareness survey)

- Customers express confusion regarding peak times[14]
  - One-half of customers say they are familiar with peak, with 25% of respondents indicating that peak is 3-7pm, weekdays, **and** in the summer
  - Program administrators generally consider peak to be 4-7pm but recognize that some emergencies may be called for different hours (extending until 8pm, for instance)

- Based on awareness survey data, 10% of all California residents state that they actually shut off electricity in response to (what they perceived to be) an FYP NOW! alert and an additional 44% say they will probably change their energy use the next time they see an FYP NOW! alert. This means that **more than half of California residents are willing to change their energy usage**, but the challenge remains notifying customers in a timely manner and educating them on what actions to take.

FYP NOW! Advertisements, Alerts and Messaging

- FYP NOW! Ads:
  - When the ads were described, 50% of respondents say that they recall seeing or hearing at least one of the radio or television ads, even if they do not remember the sponsor. However, only 10% of these respondents who recall at least one of the visuals/scripts (or 5% of all respondents) remember the name of the campaign as Flex Your Power and only 2% (or 1% of all respondents) remember the campaign name Flex Your Power NOW!.

- FYP NOW! Alerts:
  - While respondents say that television is the best form of media to reach them, due to the tight timing between calling an event and when the event occurs (usually 24 hours advance warning), radio has been used as the primary method of alert notification
  - Customers feel that the FYP NOW! "alerts" should impart a more serious tone. (While the intent is not to scare customers, they should advise of a serious situation.)
  - The process of calling an alert is fairly smooth and understood by program administrators (with the exception of turnaround time detailed below)
  - A longer turnaround time between ISO's notification and the actual event would help improve the media notification process

[14] This confusion is likely due in part to the fact that there is not one "peak" period. The time period changes based on who (i.e. CAISO) or why (summer shortage) the emergency is being called.

- However, there is confusion between what *constitutes* an actual alert and when an alert actually occurs:
    - What "NOW!" means: Ads educate residents versus alerts which notify residents that there is an energy supply emergency. Many customers do not distinguish between these messages.
    - "*It was inconsistent to [residents] because 'now' means you do something now, but they couldn't let you do it now. The alert itself was separated in time and space from the actual pre-warning message*" (quote from program administrator)

- Customers also have difficulty differentiating between FYP and FYP NOW!:
    - For the most part, residents are not able to define the nuances between energy conservation and energy efficiency (39% associate FYP with the need to conserve/save energy, while 27% associate FYP NOW! with the immediate need to conserve)
    - However, program administrators are undecided whether these messages need to be distinguished in customers' minds

Website Findings

- FYP's website, *fypower.org*, is a significant source of energy information – 2% of customers surveyed indicate that they have visited the site (350,000 visitors (or hits) but only 2% of these visitors (hits) went to the FYP NOW! pages.

3.3 Recommendations

Operational Recommendations

- The sponsors should use a "team approach"[15] to:
    - update saving measure recommendations to ensure that the optimum measures and strategies are being promoted,
    - provide consistent definitions and criteria for determining peak load periods, and
    - ensure that the messages are being delivered clearly to customers

- The sponsors should also work towards more integrated communication among the program implementation team
    - Seek and incorporate feedback among program players

- In order to reduce confusion, consistency is important in using the same phrase to describe "alerts". It appears that presently the most widely used term is a "FYP NOW! Alert Day". Care should be taken to use this term, or another agreed upon term, consistently in reports, filings and communications with customers.

Messaging Recommendations

[15] The team approach used during program design included working group meetings with team members from the IOU's, the program implementer and other relevant players.

- The sponsors should consider modifying the FYP NOW! advertisements so that:
    - they clearly state that this is not the alert, but that actual alerts will be communicated on their evening and/or morning newscast and also on the radio during their morning and afternoon commutes.
    - they educate customers on the reason for the alert day (i.e., demand was high, reserves were low).

- The sponsors should consider using FYP NOW! to encourage customers to take further actions. FYP NOW! could do more to promote overall peak reduction by informing and encouraging customers to seek and enroll in utility demand response programs.

Dissemination Recommendations

- The sponsors should consider alternating ads – based on energy demand periods – with some ads dedicated to FYP NOW! peak demand messaging and others focused on FYP energy efficiency to clearly distinguish between the two messages.

- The sponsors should work towards greater dissemination of FYP NOW! alerts. The FYP NOW! campaign can use the media venue that most customers experience – television – and adapt to the difficulties in switching out TV ad spots by working with local news broadcasts to air a banner that scrolls at the bottom of the screen alerting watchers of a FYP NOW! day, including ways to reduce peak usage.

Website Recommendations

- The sponsors should revise the FYP website to better promote FYP NOW! by:
    - Updating FYP NOW! content, which is out of date and should reflect the upcoming summer (Looking through the site in May 2006, we still saw many references to the winter months and to the summer of 2005.)
    - Including the FYP NOW! logo on the home page
    - More prominently featuring “sign up” for FYP NOW! Alerts

4 EVALUATION TASKS AND STUDIES

During the process evaluation, ODC conducted the following research activities:

- Secondary Research and Material Review
- Baseline Awareness Survey
- In-Depth Interviews with Program Administrators
- Focus Groups
- Process Evaluation Survey
- e-Newswire Survey
- Flex Your Power Web Site Review

The results of these efforts are detailed in the chapters below.

4.1 Chapter 1: Secondary Research and Material Review

One of the challenges of this evaluation effort was to gather all the required information and program history. Due to its many program administrators and the fact that the utilities did not have much information on program activities, ODC worked extensively with the Flex Your Power organization to gather information regarding the program's:

- Inception
- History
- Goals
- Budgets
- Media campaigns
- Education and outreach activities

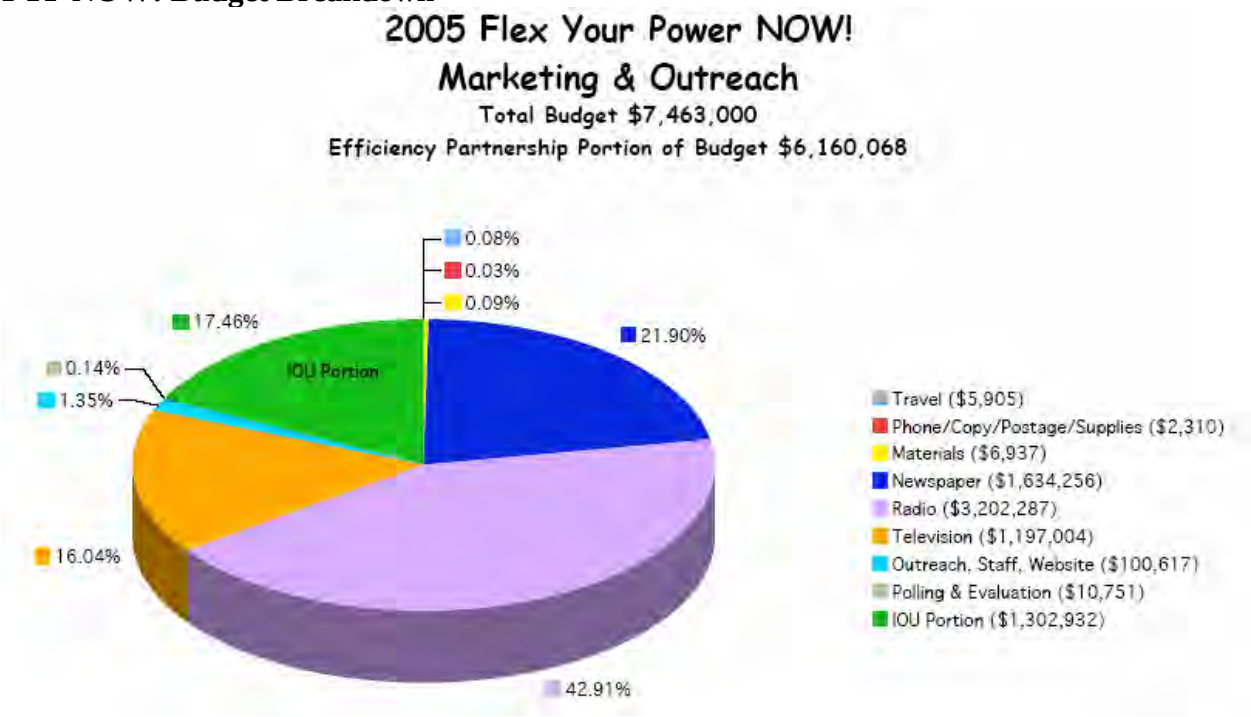
The results of this material search and review have been included below. The findings from this task were crucial in not only understanding program operations, but also in designing the survey instruments.

The following are some of the data collected during the evaluation process:

- The FYP NOW! budget breakdown
- FYP and FYP NOW! logos
- Print copies of FYP NOW advertisements and Stills from TV Commercials
- Media buys[16]

[16] While ODC was unable to obtain the exact media buys, we were able to procure a summary of media spots from Grey Advertising

FYP NOW! Budget Breakdown

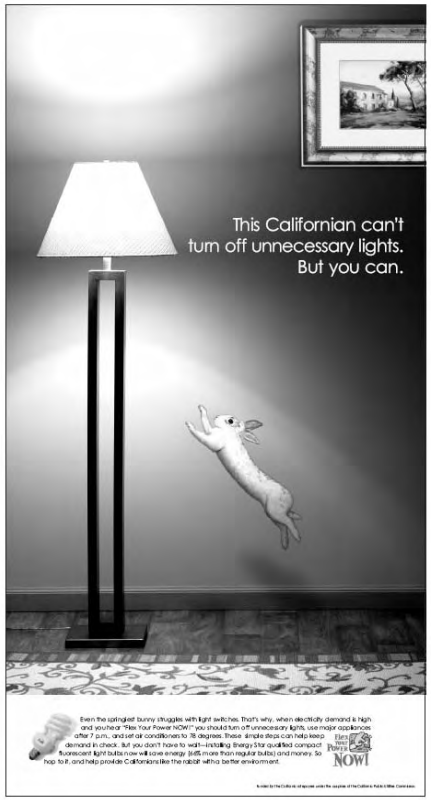


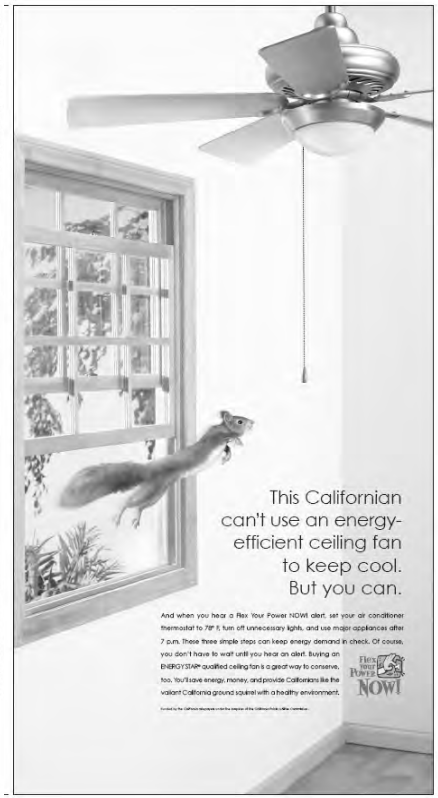
FYP and FYP NOW! Logos

Flex your POWER℠ ©

Flex your POWER NOW!

FYP and FYP NOW! Print Advertisements





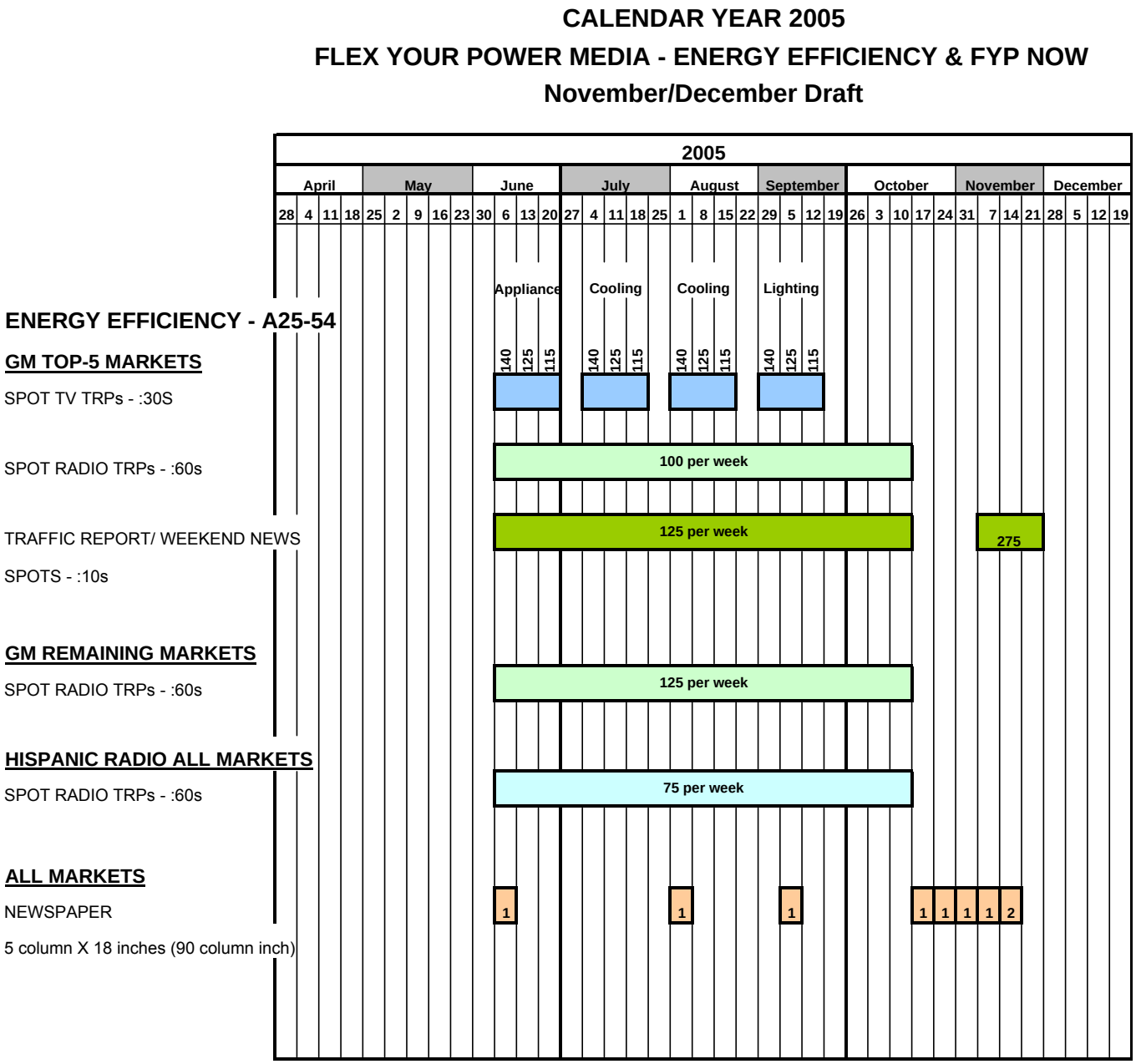
FYP and FYP NOW! Stills from TV Commercials

(asking for energy efficient appliances)

(turning on ceiling fan)

(using compact fluorescent lights)

Media Buys[17]



Notes: General Market TV and Radio TRPs vary by market to account for spill-in from neighboring markets and maximum levels available by respective market.

Hispanic Radio TRPs/Spots vary by market to account GM coverage (planned at 60% of GM TRPs) that assumes that 40% are receiving English language messages.

Traffic is planned at 150 spots per week for LA. All other markets are planned at 125 spots per week.

TRP stands for target rate points, representing reach x frequency

Source: Grey Advertising

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17 We were unable to obtain the specific plan of media buys that show the time of day the ad spots were aired or the media channels/sources used. We were also unable to obtain the media plan for alerts/notification of FYP NOW! events.

Schedule of FYP NOW! Events Called in 2004-2005

Date	Location	Reason for Alert	Forecasted Peak Demand (MW)	Actual Peak Demand (MW)
10/14/2005	Southern California	Extended heat wave, unplanned outages and high forecasted demand	35,000 MW at 4:00-6:00pm (Southern California)	
9/29/2005	Southern California	Extended heat wave and high forecasted demand	39,150 MW at 4:00pm	39,725 MW at 4:00pm
7/25/2005	Statewide	Extended heat wave and high forecasted demand	43,600 MW at 4:00pm (statewide)	43,500 MW at 4:00pm
7/24/2005	Statewide	Extended heat wave and high forecasted demand	41,900 MW at 5:00pm (statewide)	39,600 MW at 5:00pm
7/23/2005	Statewide	Extended heat wave and high forecasted demand	42,900 MW at 4:00pm (statewide)	40,600 MW at 5:00pm
7/22/2005	Statewide	Extended heat wave and high forecasted demand	45,800 MW at 4:00pm (statewide)	44,040 MW at 3:57pm
7/21/2005	Statewide	Heat wave and high forecasted demand	44,700 MW at 4:00pm (statewide)	44,651 MW at 3:0pm
7/18/2005	Statewide	Heat wave and high forecasted demand	46,000 MW at 4:00pm (statewide)	43,600 MW at 4:00pm
7/15/2005	Statewide	Extended heat wave and high forecasted demand	44,800 MW at 4:00pm (statewide)	42,800 MW at 4:00pm
7/14/2005	Statewide	Heat wave and high forecasted demand	46,182 MW at 4:00pm (statewide)	43,000 MW at 4:00pm
9/14/2004	Humboldt County	One generator tripped off line and a second unit was off line for maintenance.	38,040 MW at 4:00pm (statewide)	36,670 MW at 3:55pm
9/10/2004	Southern California	Hot temperatures and high demand	44,009 MW at 4:00pm (statewide)	44,231 MW at 3:50pm
9/8/2004	Statewide	Hot temperatures and high demand	45,097 MW at 4:00pm	45,597 MW at 4:00pm
9/7/2004	Santa Rosa Area	Damage to generation unit and transmission lines due to fire and hot temperatures	44,580 MW between 4:30-5:00pm (statewide)	45,165 MW at 4:00pm
9/6/2004	Santa Rosa Area	Damage to generation unit and transmission lines due to fire and hot temperatures	39,813 MW between 4:30-5:00pm (statewide)	39,874 MW at 4:31pm
8/11/2004	Statewide	Heat wave and high forecasted demand	46,020 MW between 4:30-5:00 p.m.	44,872 MW at 4:20pm
8/10/2004	Statewide	Heat wave and high forecasted demand	45,988 MW between 4:30-5:30pm	44,497 MW at 4:41pm
8/9/2004	Statewide	Heat wave and high forecasted demand	44,700 MW between 4:30-5:30pm	42,997 MW at 3:57pm
7/26/2004	Statewide	Heat wave and high forecasted demand.	46,252 MW around 5 pm	42,326 MW at 3:58pm

Source: www.fypower.org/now/now_events.html

Matrix of Flex Your Power Program Efforts

Campaign Name	Target market for message	Message Content*	Delivery Media	Geographical boundaries of message target	Expected reach of the effort	Message launch date	Message end date	Short Term Outcome	Intermediate Outcome	Long Term Outcome
Sea Lion (Earth Week logo)	**Residential; Age 25-59. C14Income over $40k; plan on purchasing EE appliance in next two years**	EE washing machines, Earth day message	**TELEVISION**	**See Media buy sheet attachment**	**95 percent Reach of Target audience**	April 5 2004	April 25, 2004	Educate Californians on the benefits of energy efficiency	**Motivate Californian's to take actions to achieve lasting energy savings; Support the energy efficiency programs of the Investor Owned Utilities (IOUs), third-party program providers and other organizations.**	**Increase participation in Utility energy efficiency programs; Increase the sales volume of Energy Star and emergy efficient appliance**
Sea Lion ("Generic")		EE washing machines				May 24 2004	June 13 2004			
Spotted Owl (Energy Efficiency Week logo)		EE ceiling fans				August 30 2004	September 19 2004			
Sea Lion ("Generic" Website Revision)		EE washing machines				November 8 2004	November 28, 2004			
Sea Lion (2005 Version with Flex Your Power NOW!)		EE washing machines, FYP NOW!				June 6 2005	June 23, 2005	Educate Californians on the benefits of energy efficiency,; educate Californians about what to do on a Flex Your Power NOW! day		
Frog –		EE ceiling fans, FYP NOW!				June 24 2005	September 18, 2005			
Tortoise		EE lighting, FYP NOW!				August 1 2005	September 18, 2005			

Campaign Name	Target market for message	Message Content*	Delivery Media	Geographical boundaries of message target	Expected reach of the effort	Message launch date	Message end date	Short Term Outcome	Intermediate Outcome	Long Term Outcome
Grunion	**Residential; Age 25-59. C14Income over $40k; plan on purchasing EE appliance in next two years**	EE washing machines	**Radio**	**See Media buy sheet attachment**	**95 percent Reach of Target audience**	April 4, 2004	June 13, 2004	Educate Californians on the benefits of energy efficiency		
Sheep		EE ceiling fans				August 30, 2004	September 19, 2004			
Mouse		EE lighting				November 8, 2004	November 28, 2004			
Party		Flex Your Power NOW!				August 23, 2004	October 3, 2004	Educate Californians about what to do on a Flex Your Power NOW! day		
Auditions (version A)		Energy Efficiency				June 6, 2005	July 3, 2005	Educate Californians on the benefits of energy efficiency		
Auditions (version B)		Flex Your Power NOW!				June 6, 2005	July 3, 2005	Educate Californians about what to do on a Flex Your Power NOW! day		
Earwig		EE ceiling fans, FYP NOW!				July 4, 2005	September 11, 2005	Educate Californians on the benefits of energy efficiency,; educate Californians about what to do on a Flex Your Power		
Condor		Flex Your Power NOW!				September 12, 2005	September 28, 2005			
Badger		EE lighting				September 29, 2005	October 16, 2005	Educate Californians on the benefits of energy efficiency		

Campaign Name	Target market for message	Message Content*	Delivery Media	Geographical boundaries of message target	Expected reach of the effort	Message launch date	Message end date	Short Term Outcome	Intermediate Outcome	Long Term Outcome
Sea Lion (retailer listings)	Both top-five and remaining markets, depending on assignment	EE washing machines, retailers that sell EE machines	Newspaper	See Media buy sheet attachment	95 percent Reach (does this apply to newspaper too?)	April 22, 2004 and June 11, 2004	n/a	Educate Californians on the benefits of energy efficiency		
Party (Flex Your Power NOW!)		Flex Your Power NOW!				August 29, 2004 and September 5 , 2004	n/a	Educate Californians about what to do on a Flex Your Power NOW! day		
Sea Lion (updated retailers)		EE washing machines, retailers that sell EE machines				November 21, 2004 and November 27, 2004	n/a	Educate Californians on the benefits of energy efficiency		
Congratulatory "Beach"		Congratulatory				November 28, 2004 and December 12, 2004	n/a	Educate Californians on the benefits of energy efficiency, thank leaders in energy efficiency		
Congratulatory "cinema"		Congratulatory				December 5, December 19, and December 26 – 2004	n/a			
Congratulatory CBIA Magazine	New homebuilders	Congratulatory / homebuilders				December issue	n/a	Educate Californians on the benefits of energy efficiency, thank leaders in energy efficiency		
Big Horn Sheep -So.Cal		Residential building, efficiency				(June/July, July/August, August/September, September/October, October/November, December/January) – all 2004	n/a	Educate Californians on the benefits of energy efficiency		
Big Horn Sheep – NoCal		Residential building, efficiency				(June/July, August/September, October/November) – all 2004	n/a			
Bear	Both top-five and remaining markets, depending on assignment	EE washing machines, FYP NOW!				June 12, 2005	n/a	Educate Californians on the benefits of energy efficiency,; educate Californians about what to do on a Flex Your Power NOW! day		
Squirrel		EE ceiling fans, FYP NOW!				7-Aug-05	n/a			
Rabbit		EE lighting, FYP NOW!				11-Sep-05	n/a			
Congratulatory "Cinema"		Congratulatory				October 23, November 6, and November 20 – 2005	n/a	Educate Californians on the benefits of energy efficiency, thank leaders in energy efficiency		
Congratulatory "Mother/child"		Congratulatory				October 30, 2005 and November 13, 2005	n/a			
Cuddling (Natural Gas)		Natural gas efficiency				November 19, 2005 and November 20, 2005	n/a	Educate Californians on the benefits of natural gas energy efficiency		

Campaign Name	Target market for message	Message Content*	Delivery Media	Geographical boundaries of message target	Expected reach of the effort	Message launch date	Message end date	Short Term Outcome	Intermediate Outcome	Long Term Outcome
Messages in 75 papers, representing 16 ethnicities and translated into 13 different languages			Ethnic Media Events	**See Media buy sheet attachment**		April-04	December-05			
			Tip Sheets							
Events and outreach	depends on event	energy efficiency and demand response (NOW!)	Events (e.g., Energy summits, small business workshops, local IOU events, press conference with Governor's office)	depends on event	depends on event	depends on event		Educate Californians on the benefits of energy efficiency and demand response (Flex Your Power NOW!)		
Recognition Campaign	Businesses, local govenerments, homebuilders, water agencies, nonprofits and other organizaitons	Public recognition	newspaper ads (see congratulatory ads above)	See Media buy sheet attachment for newspaper;		Ads: Same as 2004 and 2005 Congratulatory Ad dates.	n/a	motivate business through public recognition and examples of peers	Educate and encourage other organization to undertake innovative energy efficiency actions	
			Internet (website and e-newswire)	Statewide		Website: year-round. E-Newswire: on selected dates	n/a			
			Best Practice Guides	Statewide		ongoing	n/a			

Campaign Name	Target market for message	Message Content*	Delivery Media	Geographical boundaries of message target	Expected reach of the effort	Message launch date	Message end date	Short Term Outcome	Intermediate Outcome	Long Term Outcome
Flex Your Power Website	All sectors (comm, ind., govt/institutional, agricultural, residential and new construction) as well as hard-to-reach (website translated into Spanish & Chinese	mulit-faceted	Internet	Statewide		on-going	on-going	Increase awareness of the benefits of energy efficiency to targeted audiences, support IOU programs by providing linkds to all programs offered by California's program providers	Be the one-stop, statewide resource for information about energy efficiency: efficiencies in having one website, easier for customers to find all relevant information	Increase program participation, by increasing program sign ups through web site links- Reduce EE Barriers
Flex Your Power e-Newswire	: Leaders and decision makers from all sectors and other energy related groups	mulit-faceted	Electronic newsletter	Statewide		on-going	on-going	Increase awareness of the benefits of energy efficiency to targeted audiences, support IOU programs by driving traffic to IOU web sites	Keep Energy efficiency top of mind with business leaders and managers	Reduce EE Barriers
Cooperative Marketing & Outreach	Manufacturers, retailers of EE products, appliances, equipment; other providers of EE goods and services	EE products, appliances, equipment - depends on the partnership	Marketing & outreach promotions	Depends on the partnership	Depends on the partnership	Depends on the partnership		Increase awareness of the benefits of energy efficiency to targeted audiences,	Exert leverage over the promotion of energy-efficient products and services.	Increase stock (sales) of energy efficient appliances
Flex Your Power New Home's Initaitive	energy efficient new home market		Multi- media	Statewide				increase customer awareness of the benefits of Energy Star homes and support utility and third-party Energy Star new homes programs	EP will continue to communicate and coordinate with the building industry, providing updates and resources to builders so that they can permanently incorporate energy efficiency into their business plans. EP will also develop promotions and materials in conjunction with industry stakeholders and program providers. The result will be co-developed, creative and consistent marketing and outreach tools.	
								Provide updates and resources to builders and potential new home owners in order to expand public awareness of the benefits of energy-efficient single and multiple-unit homes,	Develop and expand partnerships with builders. Use these partnerships to promote Energy efficient new homes to potential buyers. Have builders incorproate energy effficiency into their building plans. Educate new home-owners on benefits of owning EE homes.	to help move California's building industry toward greater overall efficiency goals

List of Flex Your Power Media Buys (for Matrix Above)

TELEVISION STATION LIST – 2004-05

2004	**2005**
FRESNO-VISALIA	FRESNO-VISALIA
KFSN	KFSN
KGPE	KGPE
KMPH	KMPH
KSEE	KSEE
LOS ANGELES	LOS ANGELES
KABC	KABC
KCAL	KCAL
KCBS	KCBS
KCOP	KCOP
KNBC	KNBC
KTLA	KTLA
KTTV	KTTV
SACRAMENTO-STOCKTON-MODESTO	SACRAMENTO-STOCKTON-MODESTO
KCRA	KCRA
KMAX	KMAX
KOVR	KOVR
KQCA	
KTXL	
KXTV	
SAN DIEGO	SAN DIEGO
KFMB	KFMB
KGTV	KGTV
KNSD	KNSD
KUSI	KUSI
XETV	XETV
KSWB	KSWB
SAN FRANCISCO-OAKLAND-SAN JOSE	SAN FRANCISCO-OAKLAND-SAN JOSE

KGO
KICU
KNTV
KPIX
KRON
KTVU

KBWB
KGO
KICU
KNTV
KPIX
KRON
KTVU

RADIO STATION LIST – 2004-05

2004

BAKERSFIELD
KCWRFM
KERNAM
KDFOFM
KUZZFM
KRFRFM
KSMJFM
KUZZAM

CHICO
KALFFM
KFMFFM
KPAYAM
KQPTFM
KRQRFM

CRESCENT CITY
KCREFM
KPODFM

EL CENTRO
KSIQFM
KWSTAM

EUREKA
KEKAFM
KFMIFM
KINSAM

2005

BAKERSFIELD
KCWRFM
KERNAM
KDFOFM
KKBBFM
KLLYFM
KUZZAM

CHICO
KALFFM
KCEZFM
KMXIFM
KPAYAM
KTHUFM

CRESCENT CITY
KCREFM
KPODFM

EL CENTRO
KROPAM
KSIQFM

EUREKA
KHUMFM
KINSAM
KXGOFM

FRESNO	FRESNO
NOT INCLUDED IN BUY	KALZFM
	KJFXFM
	KMGVFM
	KMJAM
	KSKSFM
	KSOFFM
LOS ANGELES	LOS ANGELES
NOT INCLUDED IN BUY	KABCAM
	KBIGFM
	KCBSFM
	KFWBAM
	KJLHFM
	KLACAM
	KLOSFM
	KMZTFM
	KNXAM
	KOSTFM
	KRLAAM
	KRTHFM
	KTWVFM
	KISSFM
	KJLHM
	KRLAAM
	KYSRFM
	KZLAFM
	KVVSFM
MERCED	MERCED
NOT INCLUDED IN BUY	KHPOFM
	KHTNFM
	KUBBFM
	KYOSAM
MODESTO	MODESTO
NOT INCLUDED IN BUY	KATMFM
	KFIVAM
	KHKKFM

	KHOPFM
	KJSNFM
	KOSOFM
OXNARD-VENTURA	OXNARD-VENTURA
NOT INCLUDED IN BUY	KBBYFM
	KFYVFM
	KHAYFM
	KLJRFM
	KXLMFM
	KCAQFM
	KOCPFM
	KVTAAM
PALM SPRINGS	PALM SPRINGS
KCLBFM	KCLBFM
KEZNFM	KDESFM
KMRJFM	KEZNFM
KDESFM	KKUUFM
	KNWZAM
	KNWQAM
	KPLMFM
	KPSIFM
REDDING	REDDING
KNCQFM	KNCQFM
KQMSAM	KRDGFM
KSHAFM	KRRXFM
	KSHAFM
RIVERSIDE-SAN BERNARDINO	RIVERSIDE-SAN BERNARDINO
NOT INCLUDED IN BUY	KCALFM
	KFRGFM
	KGGIFM
	KOLAFM
SACRAMENTO	SACRAMENTO
NOT INCLUDED IN BUY	KCTCAM
	KFBKAM
	KHTKAM
	KHYLFM

KNCIFM
KRXQFM
KSEGFM
KSSJFM
KSTREAM
KXCLFM
KZZOFM

MONTEREY-SALINAS-SANTA CRUZ
KBOQFM
KCDUFM
KHIPFM
KOCNFM
KPIGFM
KTOMFM
KWAVFM

MONTEREY-SALINAS-SANTA CRUZ
KBOQFM
KCDUFM
KDONFM
KHIPFM
KOCNFM
KPIGFM
KTOMFM
KWAVFM

SANTA BARBARA
KJEEFM
KKSBFM
KRUZFM
KTYDFM

SANTA BARBARA
KJEEFM
KMGQFM
KRUZFM
KSBLFM
KTMSAM
KTYDFM

SAN DIEGO
NOT INCLUDED IN BUY

SAN DIEGO
KFMBAM
KFMBFM
KGB FM
KIFMFM
KPLNFM
KPRIFM
KSONFM
KSOQFM
KYXYFM
XPRSAM

SAN FRANCISCO

SAN FRANCISCO

NOT INCLUDED IN BUY	KBLXFM
	KCBSAM
	KDFCFM
	KFFGFM
	KFOGFM
	KGO AM
	KISQFM
	KKSFFM
	KNBRAM
	KOITAM
	KSANFM
	KTCTAM
	KZBRFM
<u>SAN JOSE</u>	<u>SAN JOSE</u>
NOT INCLUDED IN BUY	KBAYFM
	KEZRFM
	KLIVAM
	KRTYFM
	KUFXFM
<u>SAN LUIS OBISPO</u>	<u>SAN LUIS OBISPO</u>
KIQOFM	KIQOFM
KKJGFM	KKJGFM
KPYGFM	KSTTFM
KXDZFM	KXDZFM
KXTZFM	KXTZFM
KZOZFM	KZOZFM
<u>SANTA MARIA-LOMPOC</u>	<u>SANTA MARIA-LOMPOC</u>
KPATFM	KBOXFM
KSNIFM	KPATFM
KXFMFM	KSMAAM
	KSNIFM
	KTMEAM
	KUHLAM
	KXFMFM
<u>SANTA ROSA</u>	<u>SANTA ROSA</u>
NOT INCLUDED IN BUY	KRPQFM

	KVRVFM
	KZSTFM
STOCKTON	STOCKTON
NOT INCLUDED IN BUY	KJOYFM
	KWINFM
VISALIA TULARE HANFORD	VISALIA TULARE HANFORD
NOT INCLUDED IN BUY	KIOOFM
	KJUGFM
	KSEQFM

HISPANIC RADIO STATION LIST - 2004-05

2004	**2005**
BAKERSFIELD	BAKERSFIELD
KCHJAM	KDFOAM
KIWIFM	KKDJFM
KPSLFM	KCHJAM
	KIWIFM
CHICO	CHICO
KHHZFM	KHHZFM
EL CENTRO	EL CENTRO
KMXXFM	KICOAM
KQVOFM	KMXXFM
FRESNO	FRESNO
KLBNFM	KFSOFM
KOORAM	KOQOFM
KOQOFM	KLBNFM
LOS ANGELES	LOS ANGELES
KBUEFM	KBUEFM
KDAYFM	KHJAM
KHJ AM	KLAXFM
KLAXFM	KLVEFM
KLYYFM	KRCDFM

KRCDFM
KSSEFM
KWIZFM
KWKWAM
KXLOFM

KSCAFM
KWIZFM
KLVYFM
KSCAFM

LANCASTER
KUTYAM

LANCASTER
KCELFM

MERCED
KLOQFM

MERCED
KLOQFM

MODESTO
KCVRFM

MODESTO
KCVRFM

OXNARD-VENTURA
KLJRFM
KXLMFM

OXNARD-VENTURA
KLJRFM
KXLMFM

PALM SPRINGS
KUNAFM
KLOBFM

PALM SPRINGS
KUNAFM
KLOBFM

RIVERSIDE – SAN BERNARDINO
KXRSFM
KXSBFM
KCALAM

RIVERSIDE – SAN BERNARDINO
KXRSFM
KXSBFM

SACRAMENTO
KXSEFM
KRCXFM

SACRAMENTO
KTTAFM
KXSEFM
KRCXFM

MONTEREY-SALINAS-SANTA CRUZ
KPRCFM
KRAYFM

MONTEREY-SALINAS-SANTA CRUZ
KPRCFM
KRAYFM

SANTA BARBARA
KBKOAM
KSPEFM

SANTA BARBARA
KBKOAM
KSPEFM

	KZERAM
SAN DIEGO	SAN DIEGO
KLNVFM	KLNVFM
KLQVFM	KLQVFM
SAN FRANCISCO	SAN FRANCISCO
KSOLFM	KSOLFM
KSQLFM	KSQLFM
	KBRGFM
SAN JOSE	SAN JOSE
KVVFF1	KVVFF1
SAN LUIS OBISPO	SAN LUIS OBISPO
KLMMFM	KLMMFM
KLUNFM	KLUNFM
SANTA MARIA-LOMPAC	SANTA MARIA-LOMPAC
KRQKFM	KIDIFM
SANTA ROSA	SANTA ROSA
KRRSAM	KRRSAM
KTOBAM	KTOBAM
STOCKTON	STOCKTON
KMIXFM	KMIXFM
VISALIA-TULARE-HANFORD	VISALIA-TULARE-HANFORD
KGENFM	KGENFM
KMQAFM	KMQAFM

TRAFFIC STATION LIST – 2004-05

2004	**2005**
FRESNO	FRESNO
MNFRT	MNFRT
LOS ANGELES	LOS ANGELES

CCLAT
MNLAT

SACRAMENTO
CCSCT
MNSCT

SAN DIEGO
CCSDT
MNSDT

SAN FRANCISCO
CCSFT
MNSFT

CCLAT
MNLAT

SACRAMENTO
CCSCT
MNSCT

SAN DIEGO
CCSDT
MNSDT

SAN FRANCISCO
CCSFT
MNSFT

NEWSPAPER LIST – 2004-05 COMBINED

2004 - 2005

Appeal-Democrat
Antelope Valley Press
Alameda Newspaper Group
The Daily Review
Fremont Argus
Marin Independent Journal
Tri-Valley Herald
The Bakersfield Californian
San Jose Mercury News /
Contra Costa Times Group
Contra Costa
West Valley Times
San Ramon Valley Times
Valley Times
Chico Enterprise-Record
Daily Breeze
Daily Republic
The Desert Sun
The Fresno Bee
Imperial Valley Press
Los Angeles Times
Los Angeles Newspaper Group
Los Angeles Daily News
Long Beach Press-Telegram
San Gabriel Valley Tribune
Whittier Daily News
Pasadena Star-News
The Sun
Redlands Daily Facts
Inland Valley Daily Bulletin
The Modesto Bee
Monterey County Herald
North County Times
The Orange County Register
The Santa Rosa Press Democrat
Register-Pajaronian
Riverside Press Enterprise
Record Searchlight
The Sacramento Bee
Santa Barbara News-Press
Santa Cruz Sentinel
Salinas, Californian
The San Diego Union-Tribune

San Francisco Chronicle
The Stockton Record
Times-Standard
Telegram-Tribune
The Union Democrat
Ventura County Star
Visalia Times-Delta

ETHNIC PUBLICATIONS (Efficiency Partnership ran ads in these papers. Not every ad was run in each paper).

African American
Oakland Post
Metro Reporter
Sacramento Observer
California Advocate
Black Voice
Los Angeles Watts Times
Los Angeles Sentinel
Precinct Reporter
Wave Community Newspapers
San Diego Voice & Viewpoint
Latino
El Bohemio News
El Mensajero
El Observador
La Oferta Review / El Vistazo
Nuevo Mundo
El Popular
Vida en el Valle
Noticiero Semanal
News en Espanol
Eastside Sun / Eastern Group Publications
Latino
La Opinion
Hoy
Mundo LA
Excelsior
La Prensa (Riverside)
La Prensa (Riverside)
Impacto USA

El Latino (San Diego)
Enlace
Hispanos Unidos
La Prensa San Diego
Chinese
Sing Tao Daily (SF Edition)
World Journal
Ming Pao (SF)
International Daily News
Sing Tao Daily (LA Edition)
China Press (LA Edition)
WJ-Chinese Daily News
International Daily News (LA Edition)
Filipino
Philippine News (SF Edition)
Asian Journal (SF Edition)
Manila Mail
Filipinas
Filipino Guardian
Pinoy Today
Manila Bulletin
Philippine News (LA Edition)
Asian Journal (LA Edition)
Diaryo Pilipino
Balita USA
California Examiner
California Journal
Taliba
Ang Peryodico
Filipino Press
Mabuhay News
Asian-Indian
India Post
India West
Mantram
India Journal
Siliconeer
Japanese
Nichi Bei Times
Rafu Shimpo
Korean

Korean Newsweek
Korea Central Daily (SF Edition)
Korea Times (SF Edition)
Korea Daily (LA Edition)
Korea Times (LA Edition)
Koream
Korean Sunday News
Vietnamese
Cali Today
Viet Mercury
Vietnam Liberty News / VietHome
Nguoi Viet Daily News
Viet Bao Daily
Cambodian
Angkor Borei News
Thai
Inter-Thai/Pacific Rim News
Siam Chronicle
Russian
Panorama
Armenian
Asbarez Daily
USA Armenian Life Magazine
Arab
Beirut Times
Pakistan
Pakistan Today (Muslim World Today)
Pakistan Link
Portuguese
Portuguese American Chronicle
Iranian
Pezhvak
Pan-Asian
AsianWeek

4.2 Depth Interviews with Program Administrators

4.2.1 Introduction

Opinion Dynamics conducted several in-depth interviews with Flex Your Power/Flex Your Power NOW! program staff and administrators in order to better understand the campaign's:

- processes for educating and alerting California residents
- functions in relation to Flex Your Power
- goals of the campaign

These interviews helped shape other data collection efforts in our evaluation of Flex Your Power NOW!. From January to April 2006, we conducted interviews with seven program staff from McGuire & Company, Research 360, Grey Advertising, as well as PG&E and SDG&E. Program administrators from SCE, the California Independent System Operator, and the California Energy Commission were not interviewed as part of this task. Findings from our depth interviews are presented below.

4.2.2 Campaign Design and Theory

Program staff were able to provide an inside look at the formation of Flex Your Power NOW!, which started out as a concept from one utility as a voluntary demand response program shaped around the Spare The Air campaign[18]. Initially formed as "Power Down," it became a joint utility effort that was included as part of the Flex Your Power program in 2004. The primary reason for merging a demand response/conservation message with Flex Your Power's energy efficiency focus was to leverage resources, drawing on the recognition of the FYP campaign and piggybacking media buys with existing FYP ones. Further discussion regarding the combining of the two campaigns is presented later, in Section 4.2.6.

4.2.3 Program Goals

The goals and objectives seem to be clear and reasonable to implement among program staff. As described by one program staffer, the goal of FYP NOW! is "*to reduce demand on our system on those days, those very few actual days that we have a strain on our system. The Flex Your Power NOW! program is to encourage folks to voluntarily stop using electricity during peak hours on critical days, and only on critical days*." Other program staff emphasized the awareness aspect, and ensuring that customers understand what to do when the alert is called.

However, some program staff feel that the general public does not understand the goals of this program and may need more education regarding the need for the program. "*[The goals are] clearly defined to us as the implementers. I don't think they're clearly defined to the general public, no. I feel very confident that we as the players, the utilities, the ISO, we know what we're needing to do or what we're aiming to do, but the general public, it's still fuzzy*."

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[18] Spare the Air educates Californians about air pollution and also posts advisories or alerts on days when the air pollution exceeds health-based air quality standards. The advisories are announced in local media (newspaper, television, radio) and "urges residents to cut back on any activities that cause pollution." (www.sparetheair.org/data/index.htm)

4.2.4 Target Audience

Program staff can also easily identify the target audience – while FYP NOW! messaging is for everyone, the main intent is to reach residential and small business customers. "*The only way you can reach them is through media or direct mailers, a big blanket approach*." Recognizing that residential customers form the biggest base of customers, marketing for the FYP NOW! is designed with a blanket approach, attempting to reach customers by TV, radio, newspapers, and other sources such as utility websites, the FYP website, customer events, and brochures. Utility representatives acknowledge that large business customers have the greatest impact on demand, and that utilities utilize account service representatives to introduce utility-based demand response programs.

The FYP effort is targeted towards energy efficiency, while FYP NOW! focuses on curtailing energy usage during peak periods – conservation. Therefore, promoting the two messages through the same advertisement is tricky, since messaging for conservation versus energy efficiency is often different. An example of this can be seen whereby FYP promotes energy efficiency technologies, and as such, homeowners are more likely to respond than renters. FYP NOW! has a wider target audience.

> "*How do we effectively target to reach those people who can make a difference? How do we reconcile two different audiences? An efficiency target is more likely to own a home, but a conservation target can be anyone*."

However, despite the blanket approach, some program administrators said they would like to see the FYP NOW! campaign target certain groups. One administrator thought that the campaign could do a better job with small business customers. Currently, the main thrust of the small business outreach is FYP's electronic newsletter, e-Newswire, for which customers subscribe to and receive via email. An additional suggestion was to further develop the outreach to ethnic and non-English speaking customers. Another administrator mentioned targeting a younger age group – young adults and teens – because teaching them about peak demand, what it costs, and how their behavior can have an impact; even though they may or may not pay electric bills, teaching them about demand reduction now will help reduce demand in the future.

4.2.5 Process for Calling FYP NOW! Events

Program staff feel that the process of calling a FYP NOW! event is in place and easy to implement. The ISO calls a state of emergency either for a local area, a service territory, or statewide, and this alert gets distributed at least 24 hours in advance to utilities for their own news releases and to McGuire & Co which then works with Grey Advertising to replace the existing FYP/FYP NOW! educational media spots on the radio with a notice that the day is a FYP NOW! day.

See Figure 4.2-1 for an illustration of ISO's process for calling an event and Figure 4.2-2 for the utilities'/FYP NOW! staff's process of communicating and spreading the word.

Figure 4.2-1: California ISO's Process to Call Electrical Emergency Events

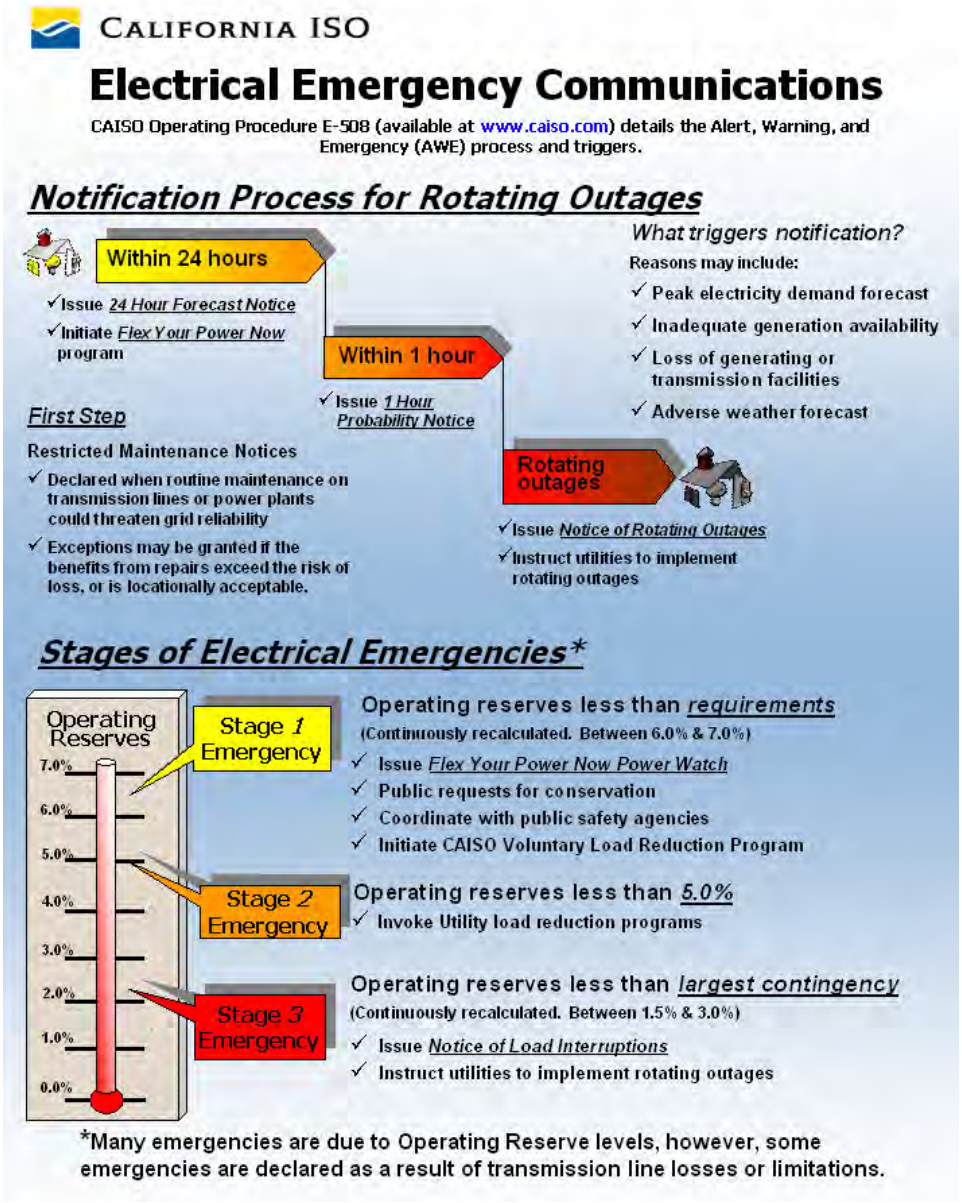
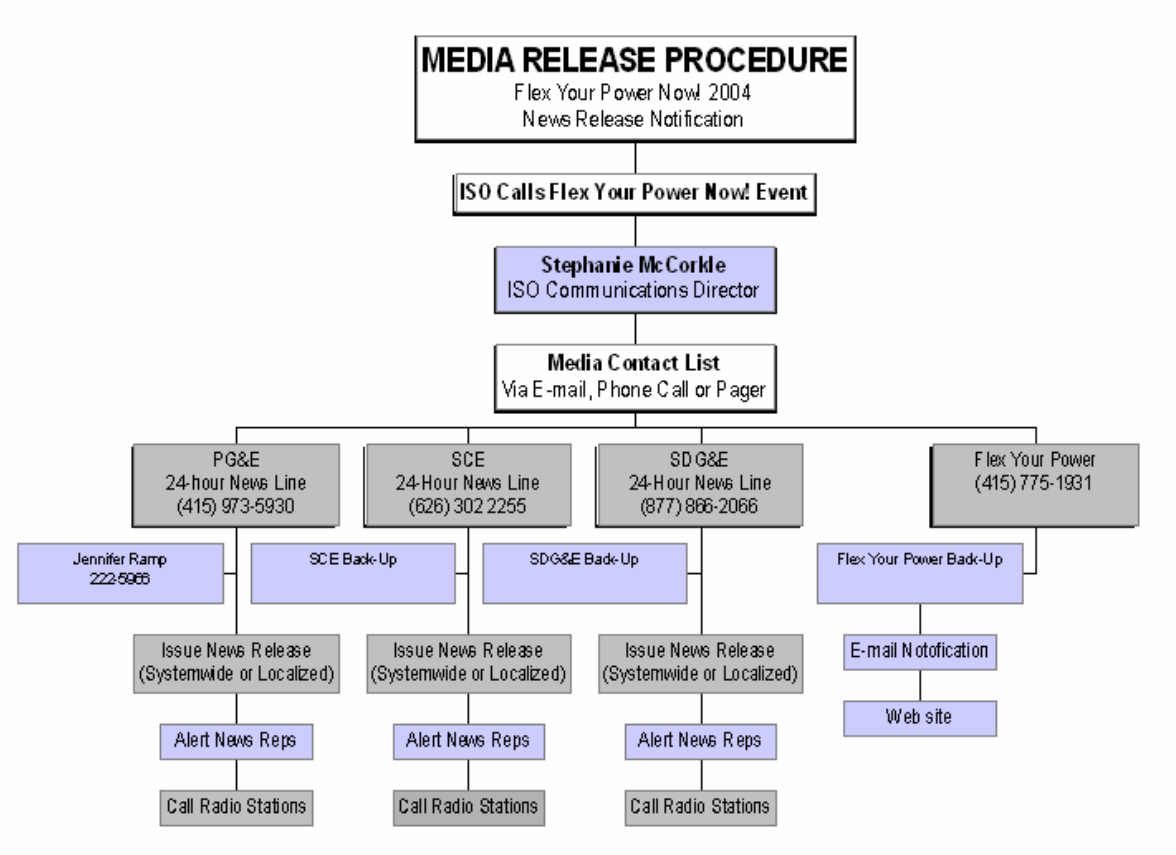


Figure 4.2-2: Flow Chart to Communicate FYP NOW! Event



Program administrators feel that they have established a good relationship with the media, and that the media understands the issue of a possible electricity shortage during an energy crisis. During emergency events, media will sometimes devote time to announcing FYP NOW! as a public service announcement. However, since the FYP/FYP NOW! program purchases commercial air time, some media outlets believe that FYP NOW! should purchase air time to promote an actual event.

Primarily because of its flexibility in deadlines, radio is the medium used predominantly to communicate when there is a FYP NOW! event, – "*that's your immediate reach to customers.*" Alerts are disseminated during local newscasts primarily on radio and possibly on television. Additionally, radio ad spots are switched out with alert messages when an event is called (but this is not done for TV).

Television local news programs rarely provide the notification of an FYP NOW! event, "*the TV is just to prepare – just to educate people and create awareness that there is FYP NOW! and what to do should one be called, but because of the immediacy and the real time-ness, the only way you can actually alert people is through radio.*" One program administrator acknowledges that radio may not be the media channel to reach the most customers, but it appears to be the best

method given the short turnaround time between when the ISO issues the alert and when the need occurs: "*It could be that even though radio is apparently not, as you saw yourself, as effective a communication [as TV] it's the only way to be able to switch out the ad spots to an alert.*"

Some options exist to increase the flexibility of television to provide the alerts in a timely manner. One option is to work with television stations to put a scrolling banner at the bottom of the screen with the alert notification, similar to severe weather warnings. Another possibility that program administrators are exploring is using television weather forecasters to help issue alerts, as changing their script is easier than changing the media buy.

The script for the alert notifications reads as follows:

> **10 Second Alert Notification**: *This report is brought to you by Flex Your Power NOW! This is a Flex Your Power NOW! Alert. Please turn off all unnecessary lights, adjust your thermostat to 78 degrees, and use major appliances after 7pm.*
>
> **15 Second Alert Notification**: *This report is brought to you by Flex Your Power NOW! This is a Flex Your Power NOW! Alert. At this time, energy demand in your immediate area is high. Please turn off all unnecessary lights, adjust your thermostat to 78 degrees, and use major appliances after 7pm. By taking these small steps, we can all help keep the lights on.*

Program administrators feel that having more turnaround time between when the ISO calls the alert and the event occurs would help creating greater awareness of the need. "*The ISO can only project a tight reserve no more than 24 hours ahead and often only hours ahead. That's a big barrier to communicate through the mass media, which has longer timetables.*"

4.2.6 Combining the Campaigns/Messages

As mentioned before, the FYP NOW! campaign is a part of the FYP program. Combining these two campaigns has led to some confusion, given the different nature of FYP NOW! – in effect, a demand response effort – and FYP – which is basically an energy efficiency education campaign. Furthermore, the two campaigns are administered by separate utilities under separate contracts. "*The contracts are very different in their rigor, so it's been a challenge to figure out how to marry the two but yet honor the separateness of the contracts.*"

Incorporating the FYP NOW! aspect into Flex Your Power was largely a joint decision made by all members of the advisory group, but one administrator says "*it wasn't something that was necessarily an agenda item for the advisory group. The discussions in terms of molding the FYP and FYP NOW! together tended to be more at the director level.*"

The primary reason for merging a demand response/conservation message with Flex Your Power's energy efficiency thrust was to leverage resources, drawing on the recognition of the FYP campaign and piggybacking media buys with existing FYP ones. One project staff member said, "*The thought was that Flex Your Power had been in place for a number of years for the energy efficiency…had a basis of recognition, had a budget and advertising. So it was felt that it*

could leverage on some of the benefits that had already been in place. And so rather than completely duplicating efforts, it was felt that the dollar would go a little farther if we could in fact leverage." In some program administrators' opinions, the average customer sees the FYP energy efficiency message as simply "save energy;" thus, adding a "NOW!" would just slightly change the message to "save energy right now."

Program administrators are uncertain about the effectiveness resulting from combining the two campaigns, but understand the reasons behind the decision of leveraging resources with the FYP campaign. "*Putting the two campaigns, under the circumstances, probably made a lot of sense. And I do agree that you should use the FYP message, it's a shorthand to a lot of people, it means save energy and verbally they responded. The part that is difficult is that we have such low funding levels…not enough to keep a brand from dropping*."

Another program administrator feels that the experiment (to combine the two campaigns) was not a success. "*I think that [FYP and FYP NOW!] probably need to be separated. I don't think the experiment of having them tagged last year worked.*"

Program administrators are split regarding whether it is necessary for the public to understand the that there is a difference between FYP and FYP NOW!. Some think it is okay if customers cannot distinguish between the programs, so long as the messages come through, while others want customers to be able to understand the difference. "W*e basically compressed the campaign, that part was fine. The part that is difficult is to try to combine two messages in the same TV ad*" but doing something like this is easier to achieve in written materials or even a longer radio ad.

Some program administrators believe that in an ideal world with a budget not as limited as FYP NOW!'s, alternating ads – with some dedicated to FYP NOW! messaging and others focused on FYP efficiency would lead to better understanding among the general population, but "*the restrictions on advertising based on the funding source requirements may have created ads that may not have been as clear on either message.*"

4.2.7 Consistent Messaging

In developing the FYP NOW! campaign and shaping the marketing strategy, the advisory group wanted to ensure that the most appropriate messaging was communicated.

Using previous studies, the advisory group distilled the various action recommendations that could reduce load at peak periods into three key messages based on:

- what appliances use the most energy at peak periods
- what appliances have the biggest impact on load
- what energy conservation actions customers are likely to perform

Although FYP, through promotion of energy efficiency products and general energy saving tips and suggestions, helps reduce overall demand, it is not enough to thwart emergencies during critical peak periods. A lesson learned during the Energy Crisis, and capitalized upon in these programs, is the possibility of tapping into customers' willingness to change behavior – "*people*

can be convinced not to use air conditioners when they understood that you can use fans or close your windows."

The three key actions chosen to be communicated to customers through FYP NOW! education efforts are the following:

1. Turn off unneeded lights/appliances
2. Set thermostat to 78 degrees (and use fans to cool house)
3. Use major appliances after 7:00pm

However, the hours of peak periods are not necessarily consistent – the exact hours of the afternoon peak vary. FYP NOW!'s third message above implies that the peak is before 7pm; the ISO will generally say it's between 4pm and 7pm; while other program administrators think peak is around 4pm to 6pm.

It should be considered that simplifying educational points such as peak hours (i.e. before 7:00pm, while actual peak periods do not always occur during those hours) in order for customers to remember the messages could in the end lead to confusion. "*The difficulty is when you have a transmission level outage, people may need to conserve until 8 o'clock at night. You may have a demand in a certain area that the peak goes until 8pm, so when you keep doing a good message in telling people 4pm to 7pm (or after 7pm), then they're going to say, 'well, what is 8pm?'*"

Regarding messaging, it was found that upon the launch of FYP NOW! previous existing efforts of a similar nature needed to be re-branded. For instance, the ISO had "Power Watch" and "*felt really strongly that they were finally getting the word Power Watch across to the media and the media understood it (in 2004)*," except that FYP NOW! was being launched at this point. According to one administrator, the ISO calls it a "Flex Your Power Now Power Watch" day.

Another level of confusion exists among the IOUs, whereby one utility might put out a news release to its media contacts on a FYP NOW! day while others may not. Furthermore, *within* one utility, the message to conserve and shed load needed to be made consistent for residential and small business customers and for the large businesses that are already on a demand response program. This administrator said the utility had to integrate FYP NOW! with their existing system so that business customers do not get two different conflicting messages; now, the message business customers receive includes the FYP NOW! message.

Program staff expressed concern about maintaining the brand but not diluting its importance and the urgency of an event. Educating consumers of the three key actions is necessary to ensure customers know what to do when a FYP NOW! day occurs, yet on the other hand, consumers also need to know *when* an alert is called. "*You need to keep reminding people of what those messages are but you don't want to lose the importance of the FYP NOW! message*." Further discussion regarding the balance of advertising and the issuing of alerts is presented in the next section.

One program administrator expressed concern about expanding the FYP concept to gasoline and water. In this one administrator's opinion, it dilutes the effort spent on FYP/FYP NOW!

activities and weakens the message. "*The more we try to leverage the FYP brand, I think there's some concern, expanding into broader markets and getting involved in other programs*."

A limited budget means that program administrators look to extend the dollars by keeping the messages simple (and absorbable to consumers) and consistent: "*I want very much to get as many people to coordinate their messages because there is just not enough money in a huge state [to push different messages]*."

4.2.8 FYP/FYP NOW! Advertising

Program administrators understand that FYP NOW! commercials need to be combined with FYP ones to leverage resources given FYP NOW!'s limited advertising dollars, but they are split about the current offering. Based on focus groups conducted by Research 360, Grey Advertising put out several animal-related scripts promoting FYP/FYP NOW!. Program administrators from utilities generally dislike the "cute" ads, feeling that the message is not getting across; they tend to want a more serious tone in the ad. However, finding the right balance may be difficult because, although program administrators want the tone to be serious, they also do not want to scare consumers. "*You don't want to call it an emergency but it is*." Several program administrators, in fact, expressed concern over the fact that consumers could start to feel like FYP NOW! is crying wolf. "*We don't want to scare, but it needs to be more forthright – a serious tone without being frightening. We don't want to be Chicken Little…*"

Utility program administrators also tend to express a preference for more educational information to be included in the ads. "*It does make sense to try to leverage the budget…but FYP NOW! needs to have a more serious forthright approach to it. [The ads] were a bit esoteric, and there wasn't enough time really offered to the FYP NOW!*."

Program administrators in general also note the confusion that may occur when an alert occurs. "*Consumers are slightly perplexed as to how they could actually do anything about this given that it was a fairly urgent call to action. The other part that is perplexing to them is that the messages that contained the FYP NOW! component are essentially a two-part message. The alert itself is separated in time and space from the actual pre-warning message. It is kind of an inconsistency to them because 'now' means you do something now, but they couldn't let you do it now*." "*The advertisements don't do justice to educating people that there is a FYP NOW! program, so then there's no connection. If they don't know that there is such a thing, then there's no connection that there is an actual alert*."

As mentioned before, customers can be convinced to change their behavior in response to a FYP NOW! alert, but program staff admits that customers do not necessarily have incentives to take action on an event day. Recognizing that consumers are primarily interested in "saving money," program administrators point to being altruistic, wanting to "be a good Californian," and being a part of "something bigger" as possible motivations for the general public to respond to an alert. "*The FYP NOW! audience, since it's a behavioral change challenge, doesn't have a cost to respond to the message and therefore is a hard decision to make. Not everyone cares about saving energy, they are into the dollars. They will do things if it is important, such as an impending blackout or if there is the possibility of saving money*."

4.2.9 Improvements and Additional Comments

Program administrators would like to see a better coordination of all the players and mention wanting a more structure – having a better scope of work, a schedule, and an action plan that the team agrees upon and is administered. They would also prefer closer communication between the different actors and having more regular conference calls to touch base periodically.

Utility administrators sometimes feel that McGuire & Company tends to act on their own and want to be able to provide more input in influencing the messaging. However, they do note that McGuire & Company is good about conferring with the utilities and getting their input with what messages need to be out there – which ones have the biggest impact and what consumers are likely to do. Another administrator points out the teamwork that occurred in arriving at the key messages, as well as coming together to work FYP NOW! into FYP.

Some administrators feel that the utilities could play a more integral role in trying to get the awareness of an event out. However, utilities point to their demand response programs that notify their large business customers of events and ask them to reduce their demand at peak. As such they may not feel as much of a need to encourage these customers to sign up to receive FYP NOW! email alerts. Also, based on Figure 4.2-1 above, demand response programs may not be invoked until a more serious stage, while FYP NOW! alerts are distributed during a Stage 1 Emergency phase.

A lesson from 2005 taught the team to try to localize the alert for the emergency area, but some administrators would like the ISO to be able to target the problem areas more. "*Eight of the events last year were statewide even though there was not a bit of a problem for most of the state. So what we did was to concentrate our phone calls to the media and to radio stations in Southern California*." However, if the ISO narrowed which areas the emergency applied to, statewide alerts would not need to be issued as often, and customers would be less likely to perceive FYP NOW! to be "crying wolf." In addition, program administrators would appreciate more time from when the ISO gives the notification to disburse more alerts.

One administrator notes that, when an alert is issued for FYP NOW!, the three key actions should also follow it so that customers know what exactly to do and why. (These actions are however included in the radio alert notification scripts).

Some program administrators generally wish for more funding to have a bigger reach. "*Because of limited dollars the other thing we did is buy TV [ads] in the biggest markets which is the big five, and not the other seven smaller markets because we weren't going to get the same impact. But we did radio – and other ads in these markets. It was a mix, it wasn't the same in all markets*."

Finally, it was suggested that in addition to leveraging FYP NOW! dollars with the FYP campaign, utilities and FYP/FYP NOW! can coordinate more by working together to direct customers to utilities' various demand response programs.

4.3 Chapter 3: Baseline Awareness Survey Results

4.3.1 Introduction

As part of the effort to conduct a process evaluation of the California IOUs' Flex Your Power NOW program, Opinion Dynamics (ODC) fielded a baseline awareness survey of California residents, designed to measure levels of messaging awareness and to help assess the efficacy of the program. The survey was fielded in November 2005.

Some findings from the baseline awareness survey are presented briefly below, and are further expanded upon in subsequent sections:

Overall Findings:

We asked respondents about their familiarity with Flex Your Power NOW! and Flex Your Power. These aided responses are provided below for those who said they are very or somewhat familiar, for all respondents and by each utility territory.

- <u>Awareness of FYP NOW! Program (Aided)</u>
  - Overall 20%
  - PG&E 19%
  - SCE 23%
  - SDG&E 16%

- <u>Awareness of FYP Program (Aided)</u>
  - Overall 49%
  - PG&E 51%
  - SCE 47%
  - SDG&E 43%

While getting the message out to the intended audience is important, and the first step in any advertising campaign, having the message understood by the intended audience and ultimately having them take the desired action (i.e. buying a product, or shutting off appliances when an alert is broadcast in the case of FYP NOW!) are critical components to a marketing campaign.

While the awareness of the FYP NOW! marketing campaign is low, findings related to the desired outcomes are very promising. Extrapolating our results to the general population show that 9% of residents actually shut off electricity in response to an FYP NOW! alert and another 44% say they will probably change their energy use the next time they see an FYP NOW! alert.[19]

[19] Note: The term "alert" is being used here to represent the messages when residents are told to "Flex Your Power NOW." A day when electricity supplies are low and demand is high is declared a "Flex Your Power NOW day," without necessarily using the term "alert."

However, while respondents did not indicate inconsistencies in the FYP NOW! messaging, it appears that there may be some confusion on the part of the audience as to what constitutes an actual FYP NOW! "alert". As part of the FYP NOW! process evaluation, additional research will help determine whether customers took action as a result of an actual alert, or merely to an FYP NOW! advertisement detailing what to do in "case of" an alert. Another point of confusion may be between FYP and FYP NOW!, since messaging for both often appear in the same advertisement.

4.3.2 Survey Methodology

Using a Random Digit Dialed (RDD) sample, ODC conducted interviews with 1,200 respondents distributed evenly across the three electric IOUs' territories – Pacific Gas & Electric (PG&E), Southern California Edison (SCE), and San Diego Gas & Electric (SDG&E).[20] While ODC was provided list of zip codes comprising each utility's territory, because of existing overlap for certain zip codes, ODC opted to use self-reported responses from the respondents to determine the utility servicing each respondent.

We weighted the overall data based on 2004 numbers of housing units for each IOU territory as provided by the CPUC. These weights are provided below:

Table 4.3-1: Weighting the Number of Completes by Utility

Utility Territory	Actual Number of Completes	Percentage Weights	Weighted Number of Completes
PGE	400	46.2%	556
SCE	401	42.3%	509
SDG&E	400	11.5%	138

4.3.3 Awareness

As the first effort to gauge the efficacy of the Flex Your Power NOW! campaign, it is vital to the evaluation process to determine a baseline level of program awareness. We first gauged unaided awareness using questions that did not include the FYP or FYP NOW! names, and then followed up with aided questions that asked about the specific program using its name. Aided awareness questions tend to bias respondents into saying they have heard of the program, while unaided awareness (particularly for an amorphous effort such as conserving energy) tends to underestimate the actual level of recall. The reader should understand that "true" awareness lies somewhere in between the unaided and aided levels.

Overall, 77% of respondents are unable to recall any efforts in California designed to help conserve energy and save money in an open-ended question, and only 1% mentioned the Flex Your Power program by name, without aid. Only 1% also mentioned something related to energy use reduction or shifting usage to off-peak hours, but it is uncertain whether they had FYP or FYP NOW! in mind or if they were referring to other programs.

[20] Because of timing, an additional one respondent in SCE territory completed an interview, bringing the actual total number of completes to 1,201 and for SCE completes to 401.

Table 4.3-2: Recall of Energy Conservation[21] Efforts in California, Unaided

What efforts – such as programs or campaigns – are you aware of that are underway in California designed to conserve energy?	Total Weighted Results	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
Appliance or Insulation rebates	7%	5%	8%	6%
General rebate/energy conservation program	4%	5%	2%	4%
Solar or wind campaign/rebates	2%	2%	3%	3%
ENERGY STAR	1%	2%	1%	2%
Flex Your Power	1%	1%	2%	1%
20/20	1%	1%	<1%^	2%
Low income/senior programs	1%	<1%	1%	1%
Reduction in energy usage/energy usage during off-peak hours	1%	1%	1%	1%
Care	1%	1%	<1%	<1%
Proposition 80	<1%	<1%	0%	<1%
Other	5%	5%	4%	5%
None/don't know	77%	78%	77%	75%

^ Indicates a statistically significant difference compared SDG&E at the 95% level.

Levels of awareness varied between utilities when the question was asked if they were aware of the term "utility-sponsored energy efficiency programs". Overall, 37% of respondents indicate that they have at least some level of awareness of the term. Awareness by utility is 40% for PG&E, 36% for SCE, and 31% for SDG&E (which is significantly lower than PG&E).

General awareness of Flex Your Power NOW! is low, with only 20% of the population claiming familiarity[22] with the term. Furthermore, only 9% of those surveyed say they are very familiar with the campaign. On the other end of the spectrum, two-thirds of respondents indicate that they had no familiarity with Flex Your Power NOW! campaign.

Flex Your Power, however, scored much higher, with 49% of the population indicating familiarity with the Flex Your Power message.

Figure 4.3-1 below shows a comparison with other energy campaigns that California electric IOU customers may be familiar with. Overall, customers were aware of a wide range of messaging campaigns.

Survey results for other marketing campaigns showed:

- A nationwide Program (DOE's Energy Star) with awareness of **51%**
- A statewide program (Flex Your Power) with awareness of **49%**
- A utility service territory program (Spare the Air program in PG&E territory) with awareness of **59%**.

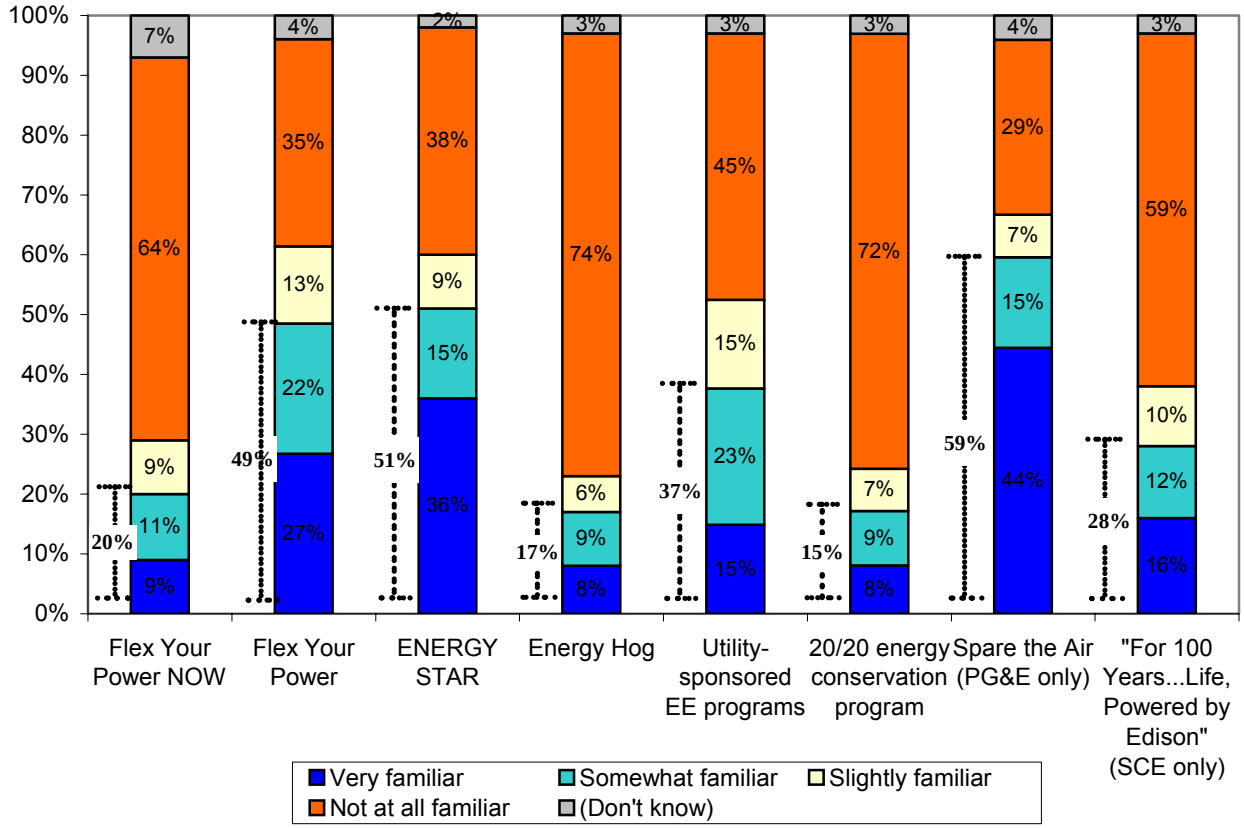
Among PG&E customers only, 44% were very familiar (and 59% were very or somewhat familiar) with Spare the Air, which promotes cleaner air quality in the Bay area by issuing

[21] The word "conservation" was used because the FYP NOW! program asks customers to temporarily do without the usual amounts of electricity they are accustomed to using.

[22] Very or somewhat familiar. Respondents were given a choice to say 'slightly familiar,' but this is considered to be an opt-out answer.

advisory alerts on certain days that are forecast to have an unhealthy air quality index. Since the Flex Your Power NOW! alerts operate in a similar manner (alerts on days or time of day when electricity supplies are low), it may be warranted to briefly review how Spare the Air works in later evaluation efforts to see if Flex Your Power NOW! can use the same successful methods and increase awareness.

Figure 4.3-1: Familiarity with FYP NOW!, FYP, and Other Energy Efficiency/Conservation Programs and Messaging



Among those who are not at all familiar with the term "Flex Your Power NOW!", SCE customers make up a significantly smaller portion, possibly indicating that the program's efforts in SCE territory have had some effect. Other factors may be responsible aside from the program's efforts, such as regional differences, media weight, and creative approach, to name a few. The following table provides a breakdown of awareness of FYP NOW! and FYP by utility.

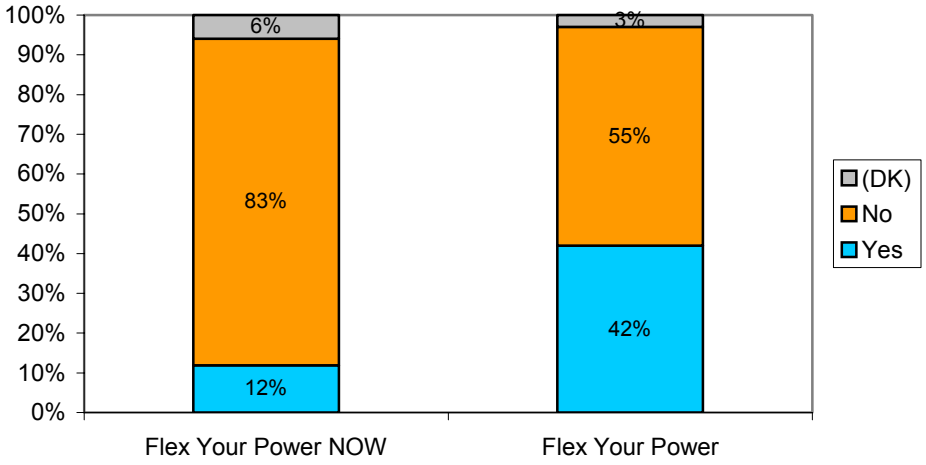
Table 4.3-3: Familiarity with Flex Your Power NOW! and Flex Your Power, by Utility

	Familiarity with Flex Your Power NOW!			Familiarity with Flex Your Power		
	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
Very familiar	8%	10%^	6%	28%^	27%	22%
Somewhat familiar	10%	13%	10%	23%	20%	21%
Slightly familiar	7%	12%+	8%	11%	15%	15%
Not at all familiar	67%	60%*	69%	35%	34%	40%
(Don't know)	8%	5%	8%	3%	4%	3%

* Indicates a statistically significant difference compared to other groups at the 95% level.
^ Indicates a statistically significant difference compared SDG&E at the 95% level.
+ Indicates a statistically significant difference compared PG&E at the 95% level.

While 42% of the population recalls hearing or seeing an advertisement for Flex Your Power, only 12% can remember a Flex Your Power NOW! advertisement. (Note that this is not recall of an FYP NOW! *alert*, which will be discussed later.) The ability to recall FYP NOW! advertisements is low, but not surprising, considering the 20% awareness level of FYP NOW!.

Figure 4.3-2: Respondent Recall of Hearing or Seeing Messages/Advertisements for Each Campaign



In general, recall of advertisements from *either* campaign is less than one-half. Because the advertisements for both campaigns are often melded together, most of those who remember an FYP NOW! ad also remember an FYP message.

Figure 4.3-3: Respondent Recall of Hearing or Seeing Messages/Advertisements for Either Campaign

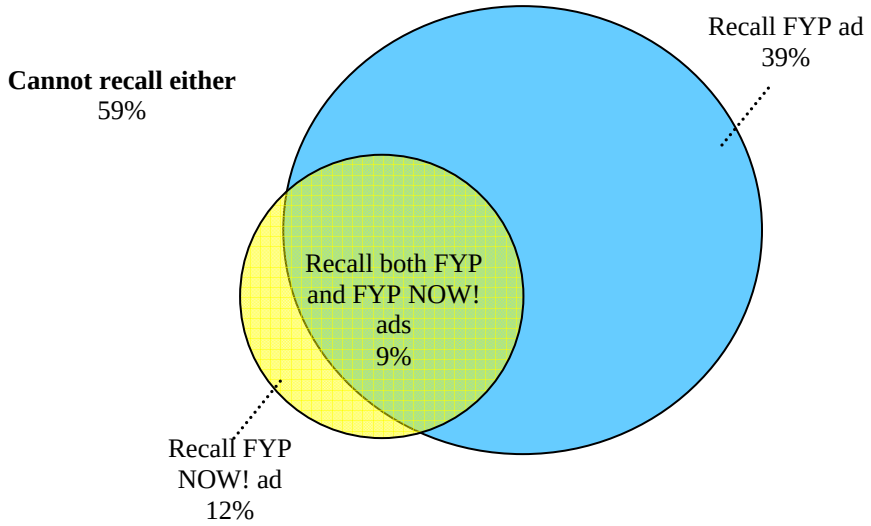


Table 4.3-4 below breaks down the messages that respondents associate with the terms Flex Your Power and Flex Your Power NOW!.

When hearing the names for both campaigns, respondents are somewhat able to acknowledge that the programs help conserve energy (29% for FYP and 10% for FYP NOW!), but only a handful are able to associate them with more specific messages such as conserving at specific times (7% for FYP), shutting off or altering equipment usage (6% for FYP), or an immediate need to conserve energy (7% for FYP NOW!). In total, 12% of respondents were able to attribute the FYP NOW! term as a message that is time sensitive (related to immediacy or peak). However, 65% are unable to associate FYP NOW! with any message, saying they don't know or have never heard of the term.

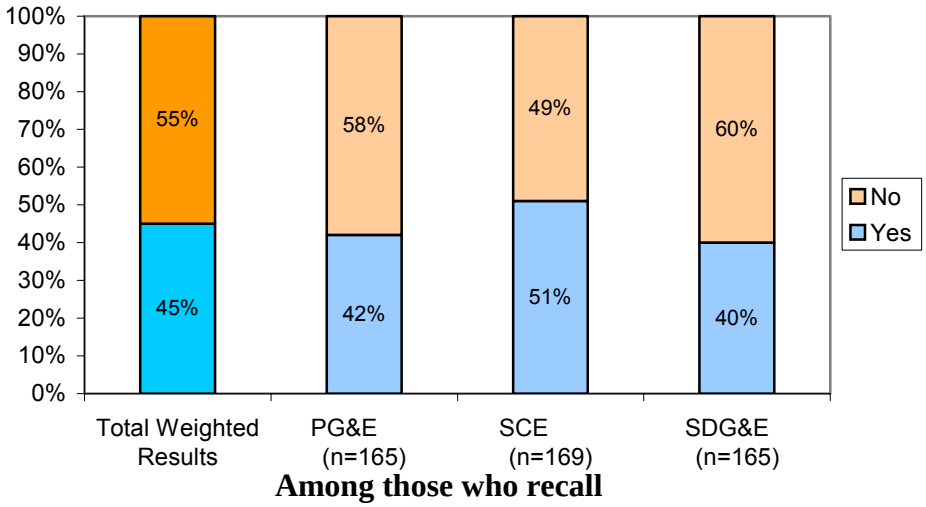
Table 4.3-4: Respondent Association with the Terms "Flex Your Power" and "Flex Your Power NOW!"

What do you think of when you hear the term "Flex Your Power " / "Flex Your Power NOW!"?	Association with FYP term (n=1203)	Association with FYP NOW! term (n=1203)
Conserve energy/electricity	29%	10%
Immediate need to conserve energy / Urgency	--	7%
Conserve at specific times / Don't use appliances at peak hours	7%	2%
Shut off equipment / Alter usage	6%	4%
I have control/power/responsibility of energy use	2%	1%
Save money on bill/cost of electricity	2%	1%
Power shortage / Decrease blackouts / Brownouts / Avoid a brownout	1%	1%
Shut off equipment immediately	--	2%
Generally think of energy	2%	<1%
Non-energy related – aerobics/muscles/	1%	<1%
Buy/Install new appliances	<1%	--
Other	8%	8%
Never heard of term	14%	24%
Don't know/Refused	29%	41%

4.3.4 The Advertising Messages

Forty-five percent of those who recall hearing or seeing a Flex Your Power advertisement (out of n=501) say they have altered their energy usage as a result of the information they learned. SCE customers are somewhat more likely to have acted upon the FYP information than SDG&E customers. However, the lower percentage of SDG&E customers who altered their energy usage may be because of changes taken in response to the Energy Crisis.

Figure 4.3-4: Altered Behavior As a Result of the Information Learned from Flex Your Power, By Utility



The tables below break down the messages respondents say they learned from the Flex Your Power and Flex Your Power NOW! advertisements and what actions they have taken as a result of what they learned.

Table 4.3-5: Learned Messages and Actions Taken from FYP Advertisement

FYP	**Message Learned from FYP Ad:** What do you recall learning from the message you saw or heard for Flex Your Power? **(n=501)**	**Actions Taken:** What have you done in altering your energy usage/purchasing equipment as a result of the information learned from FYP? **(n=228)**
Conserve energy/electricity	61%	--
Conserve at specific times / Don't use appliances at peak hours	2%	15%
Shut off equipment / Alter usage	21%	17%
Buy/Install new appliances	12%	33%
Change thermostat settings	12%	12%
Cut down use of appliances	--	10%
Purchased low watt/fluorescent bulbs	--	9%
Conserve energy / Close windows /Fix drafts	--	5%
Get an energy audit	4%	--
Power shortage / Decrease blackouts / Brownouts /Avoid a brownout	4%	--
Other	2%	4%
Don't know/Refused	20%	6%

NOTE: Message Learned asked of respondents who recalled seeing/hearing an FYP ad; Actions Taken asked of respondents who said they altered energy usage/purchased equipment as a result of information learned from FYP

Table 4.3-6: Learned Messages and Actions Taken from FYP NOW! Advertisement

	Message Learned from FYP NOW! Ad: What is the main message/idea associated with the FYP NOW! ad you heard? **(n=139)**	**Suggestions Recalled from FYP NOW! Ad:** What suggestions do you remember hearing? **(n=139)**
Conserve energy/electricity	33%	13%
Shut off unnecessary appliances/electric equipment	27%	36%
Turn thermostat down	21%	33%
Turn off unneeded lights	14%	23%
Use major appliances in early morning or at night	14%	25%
Use fans to cool house	11%	19%
Pull window shades/curtains	3%	7%
Other	1%	1%
DK/Refused	16%	27%

NOTE: Asked of respondents who recalled seeing/hearing an FYP NOW! ad

4.3.5 Reaction to an FYP NOW! Alert

After hearing the definition of FYP NOW!, one-fifth of the population (20%) say they have heard an *alert* asking to Flex Your Power NOW!. Those who have heard an FYP NOW! alert are significantly more likely to be able to mention specific energy conservation campaigns in

California and to have altered their energy usage or purchased equipment as a result of the information learned from FYP. Additionally, they are more likely to think that their electric utility sponsors the FYP NOW! program and that a radio announcement is most effective way to inform them about the immediate need to reduce energy usage for that day while people who have not seen an alert think an email message would be an effective form of communication.

Among these 244 respondents who have heard an FYP NOW! alert, 45% (n=110, or 9% of all respondents) said they shut off electricity after hearing the alert. The actions that these customers report taking after hearing the alert are presented in Table 4.3-7 below. Actions include shutting off unnecessary electric equipment or shifting usage to a different time of day. Other actions mentioned include using fans to cool the house or turning down the thermostat. These are all suggestions found in FYP NOW! messaging, which indicates that these customers are listening to the marketing message.

What is still unknown, however, is whether confusion occurred about *messages* for FYP NOW! and *alerts*. FYP NOW! messages tell customers what to do when an alert occurs, but it may be possible that customers interpret the message as the alert and prematurely take action. Based on this survey, only 139 respondents 'aided' say they heard/saw an advertisement for FYP NOW!, but after hearing more about the campaign and being educated, 244 respondents indicated that they heard/saw an FYP NOW! alert. However, it is also possible that this difference can be attributed to a general bias regarding aided versus unaided questions, since a description of the program and the alert preceded the latter question about the alert but was not given prior to the question about recalling an FYP NOW! ad.

Table 4.3-7: Actions Taken After Hearing FYP NOW! Alert

After hearing the message alert, did you shut off any electricity? What did you do?	Actions taken After hearing FYP NOW! alert (n=110)
Shut off unnecessary appliances/electric equipment	43%
Turn off unneeded lights	37%
Use major appliances in early morning or at night	28%
Use fans to cool house	22%
Turn thermostat down	15%
Conserve energy/electricity	11%
Pull window shades/curtains	9%
Other	--
Don't know/Refused	1%

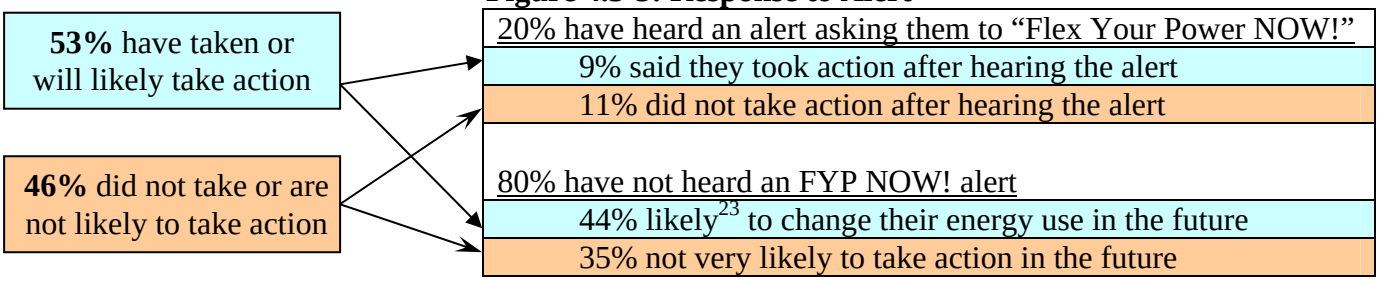
NOTE: Asked of respondents who said they altered energy usage/purchased equipment as a result of information learned from FYP NOW!

Of the other four-fifths of the population (80%) who said they have not heard an alert message for FYP NOW!, more than half (56% of n=959) say they would be very likely to change their energy use if they saw an FYP NOW! alert in the future (a top 3 rating on a scale of 10).

To sum up this section's findings in terms of the entire population, 9% say they took action in response to an FYP NOW! alert and 44% say they will probably change their energy use the next

time they see an FYP NOW! alert. While the general barriers for the remaining 46% who did not take action or are not likely to reduce usage in response to a future FYP NOW! alert are probably lack of awareness and understanding, absence of specific information, and inability to reduce usage, later evaluation efforts will explore these possible barriers in more detail (for example, what specific information is required, and whether the inability to reduce usage is perceived or real).

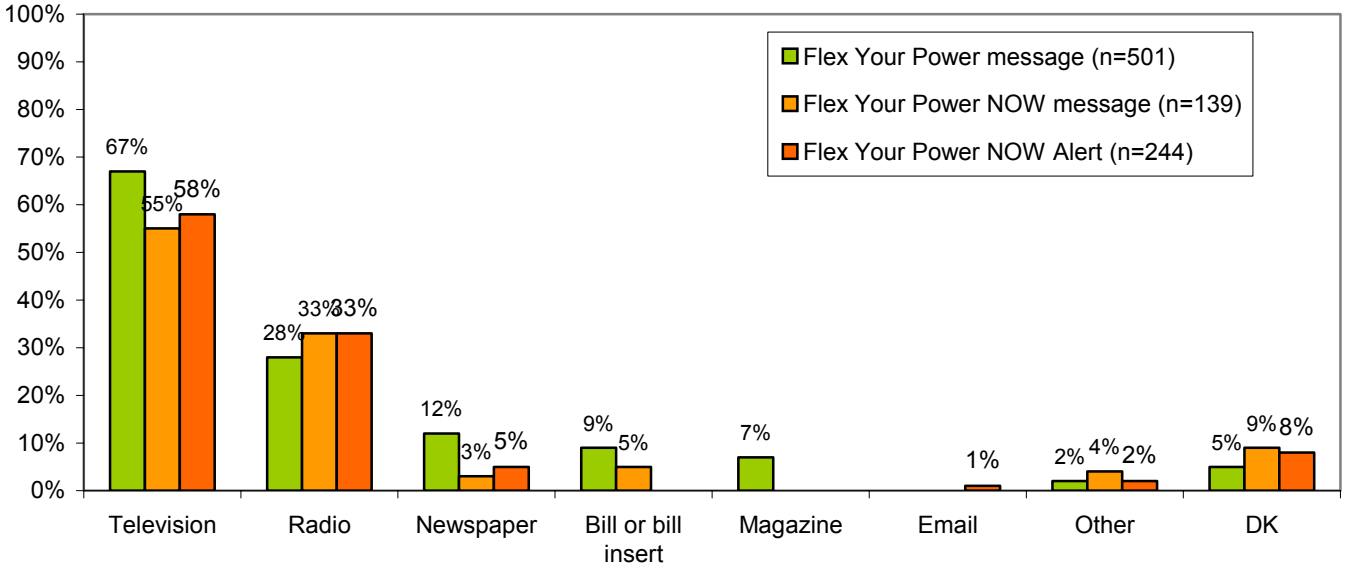
Figure 4.3-5: Response to Alert



4.3.6 Media Channels and Preferences

Customers mainly get their information about FYP, FYP NOW! and FYP NOW! alerts through television or radio. Others mentioned the newspaper or a bill insert.

Figure 4.3-6: Method Through Which the FYP NOW! Advertisement or Alert Reached Respondents



[23] Respondents who had given a top 3 rating on a scale of 10 for how likely they would be to change their energy use if they saw an FYP NOW! alert in the future.

These two media channels – television and radio – are also reported by respondents as the most effective ways to inform them of the immediate need to reduce energy usage for that day. Interestingly, although only 1% of those who saw an FYP NOW! alert said they got this notice through email, 9% of the population prefers getting an email when there is a need to reduce usage. This could be further explored as a relatively low-cost method of dispersing notice of an alert for the FYP NOW! campaign; future evaluation efforts may want to consider how viable this is as an option and whether customers would be willing to share their email address and if they would respond to such an email.

Table 4.3-8: Most Effective Method to Inform Customers of the Immediate Need to Reduce Energy Usage

Which of the following would be the most effective way to inform you of the immediate need to reduce your energy usage for that day?	Effective Method of Communication (n=1203)
Television	47%
Radio	25%
Email	9%
Newspaper	9%
Highway message announcement	3%
Phone call	1%
Other	1%
DK	5%

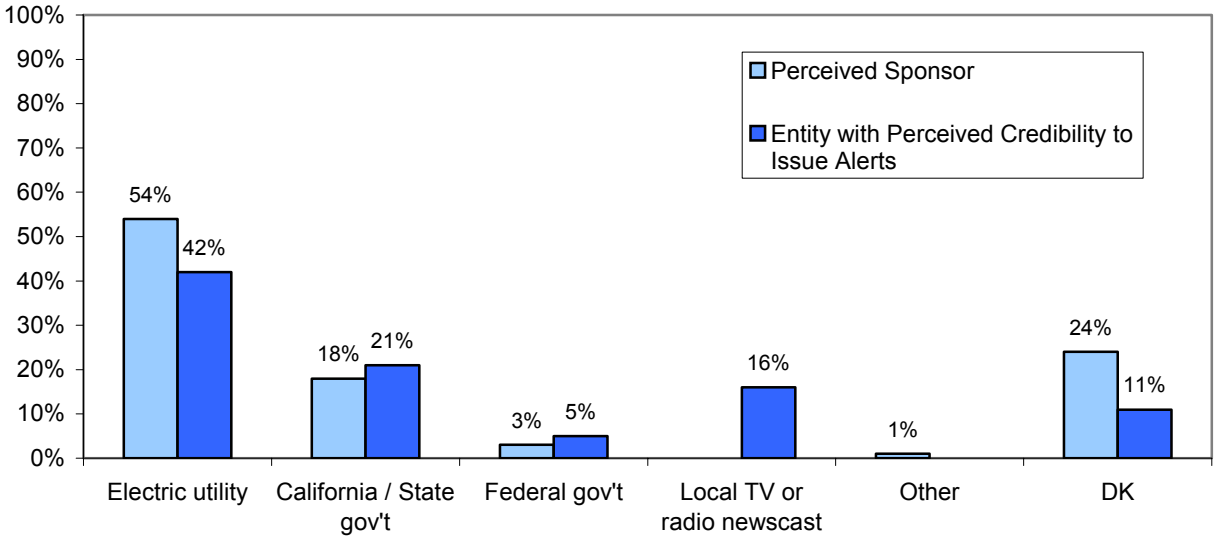
Only 2% of the population report having visited the Flex Your Power website at www.fypower.org. Because of this low percentage, both FYP and FYP NOW! campaigns should continue to pursue traditional media outlets (television, radio, and newspaper) as ways to reach a wider swath of customers.

4.3.7 Sponsorship and Credibility

Most customers thought their electric utility sponsored the FYP NOW! program, and a few others thought it was sponsored on the statewide government level. They also thought these two entities, in addition to their local television or radio newscast, were the most credible in issuing alerts to conserve energy. That respondents feel their local media newscast is credible at issuing alerts is somewhat surprising, but a probable explanation is that respondents confused *issuing* with *reporting* the alerts.

In addition to being perceived as the sponsor of the FYP NOW! program by most customers, electric utilities are perceived as the most credible source to issue alerts to conserve energy.

Figure 4.3-7: Respondents Perception of Which Entity Sponsors the FYP NOW! Program and Which Entity Has the Most Credibility To Issue Alerts to Conserve Energy



4.3.8 Customer Characteristics

Figure 4.3-8 shows the saturation of various appliances as reported by respondents in their home. These major appliances also represent the means to greatly reduce overall energy usage, if customers turned off or shifted the use when energy needs for California are high.

Figure 4.3-8: Appliances in Home

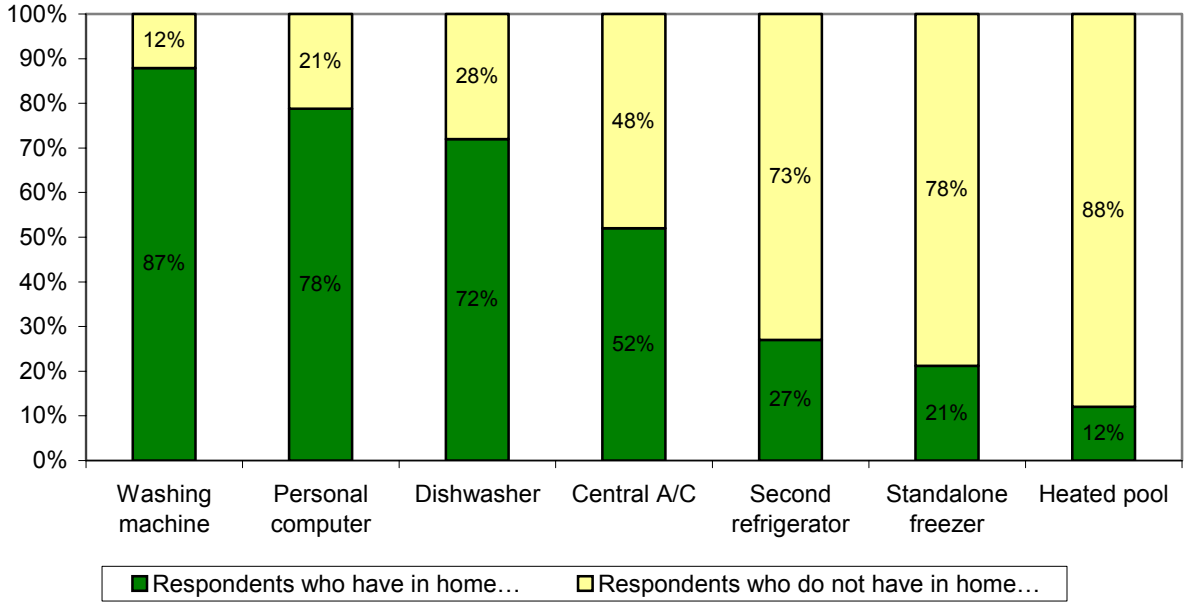
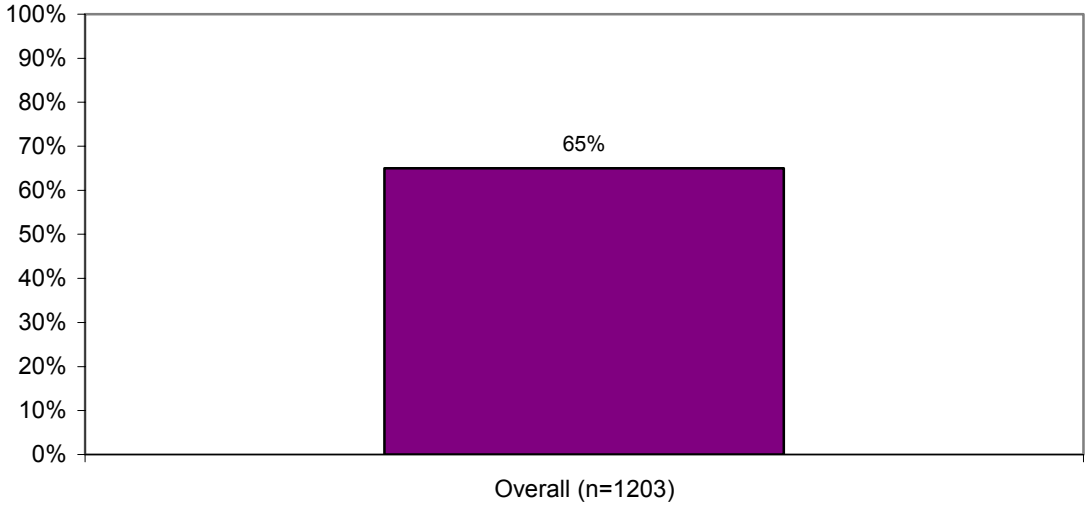


Figure 4.3-9 presents the responses of customers who say someone in their household is at home during a typical weekday afternoon. Since peak times often occur during this period, someone who is at home can react more readily to an alert to Flex Your Power NOW!.

Figure 4.3-9: Someone at Home During a Typical Weekday Afternoon



Demographics

The following tables present the demographics of the respondents we interviewed, in total and for each utility. Note that where statistically significant differences exist compared to the other utilities, these are denoted with the following symbols:

- * compared to all utilities
- + compared to PG&E
- ^ compared to SCE
- ◇ compared to SDG&E

Table 4.3-9: Ethnicity of Respondents

	Total Weighted Results	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
White	71%	73%	68%	70%
Hispanic/Latino	14%	15%	14%	14%
Black/African American	4%	2%	7%*	4%
Asian	4%	3%	5%	4%
American Indian/Alaskan Native	1%	2%	1%	1%
Native Hawaiian or Other Pacific Islander	<1%	<1%	<1%	2%
Other	1%	1%	<1%	2%
Don't know/Refused	4%	4%	4%	4%

Table 4.3-10: Type of Residence

	Total Weighted Results	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
Single family	72%	74%	72%	65%*
Apartment/condo in a 2-4 unit building	9%	9%	8%	11%
Apartment/condo in a >4 unit building	8%	6%	9%	11% +
Duplex or two-family	4%	6% ^	2%	4%
Mobile home / House trailer	3%	2%	4%	3%
Townhouse / Rowhouse	2%	1%*	3%	4%
Other	1%	<1%	1%	1%
Don't know/Refused	1%	1%	<1%	1%

Table 4.3-11: Age of Home/Apartment

	Total Weighted Results	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
0-4 years old	6%	6%	7%	8%
4-10 years old	10%	11%	7%*	12%
11-15 years old	8%	7%	10% ◇	6%
16-20 years old	9%	8%	11%	10%
21-40 years old	32%	33%	31%	30%
41-80 years old	22%	20%	24%	22%
81+ years old	4%	6%*	1%	3%
Don't know/Refused	9%	8%	9%	10%

Table 4.3-12: Owners and Renters

	Total Weighted Results	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
Own	69%	68%	71%	66%
Rent	27%	28%	26%	30%
Don't know/Refused	3%	4%	2%	4%
Bill payers *among renters only*	**Weighted Results**	**PG&E (n=111)**	**SCE (n=105)**	**SDG&E (n=120)**
Someone in household pays electricity bill	82%	82%	82%	82%
Bill is included in rent	16%	16%	15%	15%
Other	1%	1%	--	2%
Don't know/Refused	2%	1%	3%	2%

Table 4.3-13: Level of Education

	Total Weighted Results	PG&E (n=400)	SCE (n=401)	SDG&E (n=400)
Less than high school graduate	2%	3%	2%	3%
High school graduate	23%	21%	26% ◇	20%
Technical/trade school graduate	2%	1%	2%	2%
Some college	23%	22%	24%	25%
College graduate	28%	28%	27%	28%
Some graduate school	2%	2%	2%	3%
Graduate degree	17%	20% ^	13%	16%
Don't know/Refused	3%	3%	2%	3%

4.4 Chapter 4: FYP NOW! Focus Group Memo of Results

4.4.1 Introduction

Opinion Dynamics Corporation (ODC) conducted six focus groups with California residents as another step in the process evaluation of the California IOUs' Flex Your Power NOW! (FYP NOW!) program. This effort was designed to gain a qualitative understanding of customers' familiarity and comprehension of the advertisements and messages of the Flex Your Power NOW! campaign. The focus groups also probed for respondent feedback on energy efficiency, peak energy use and understanding, and efforts to reduce energy consumption.

General findings from the focus groups are presented briefly below, and are further expanded upon in subsequent sections. It should be noted that these are qualitative findings and therefore do not necessarily represent the population.

Overall Findings:

- Most respondents were not able to differentiate the message of Flex Your Power versus Flex Your Power NOW!.
- "NOW!" as part of "Flex Your Power NOW!" had different meanings to different people. Many respondents did not understand the actions they were to take, and when they were to take it.
- Imparting a serious tone when issuing the FYP NOW! alert is important. The FYP NOW! ads should explain the possible consequences of not conserving energy when an alert is issued.
- Provide more information on what constitutes a Flex Your Power NOW! event.
- Customers require additional details on where, and how an "event" will be communicated.
- Although there are budget constrictions to consider, separating out Flex Your Power ads from Flex Your Power NOW! ads will reduce confusion regarding each message. Efficiency and conservation are separate issues and customers need separate messages to comprehend this.

4.4.2 Methodology

ODC conducted two focus groups per each of the three sponsoring electric utility territories, for a total of six sessions, on the following days: January 30, 2006 in Walnut Creek (PG&E); January 31, 2006 in San Diego (SDG&E); and February 1, 2006 in Irvine (SCE).

Focus group participants were recruited using a Random Digit Dialed (RDD) sample based on zip codes within a certain mile radius of each focus group facility. Screening criteria included having PG&E, SCE, or SDG&E as their electric utility, and being the household's electric bill payer. Also, another criteria was that at least half of the recruited participants in each group had central air conditioning in their home. We recruited the central air conditioning users to ensure that we spoke with customers who could make a significant change in energy consumption during peak times.

4.4.3 Awareness of FYP NOW!, FYP, and Other Energy Programs

While most focus group participants indicated that they were aware of Energy Star, and that it signifies energy efficiency and appliances that save energy, few focus group participants were able to mention either Flex Your Power or Flex Your Power NOW! unaided, and were only somewhat aware of Flex Your Power after a verbal prompt. While the baseline awareness telephone survey conducted in December 2005 showed relatively high levels for both Energy Star and FYP campaigns – focus group participants did not seem to convey these same results[24]. Furthermore, there was general confusion as to the messages that the Flex Your Power and Flex Your Power NOW! advertisements were trying to convey.

Participants were confused by the FYP NOW! and FYP campaign's messages. Often, they would interchange the two messages and say that the FYP program promoted, for example, using appliances after 7pm. This message to conserve and/or shift usage actually originates from the FYP NOW! campaign, while FYP encourages Californians to buy or install energy efficient products such as compact fluorescent lighting, energy efficient appliances, and ceiling fans.

Comparing the logos for the two programs, respondents noted the similarity between them, with the exception of the word "NOW!" The connotations of NOW! caused a range of responses, from one respondent saying, *"The second one here is telling us it's still on, you know. It hasn't changed, because I think that's what needs to be said is – people tend to forget and carry on in their life, and that it still needs to be done and applied"* to respondents who said that the word "NOW!" connoted brownouts and triggers a "do it now" type command.

Figure 4.4-1: Logos for Flex Your Power and Flex Your Power NOW!

4.4.4 Comprehension of Peak

The topic of "peak" was brought up unaided in most of the focus groups. Most attendees either already had an understanding of or were quickly able to grasp the concept of "peak", as times

[24] Our focus groups have provided us with useful information to change the way we ask the awareness questions about FYP NOW! in our upcoming quantitative survey.

when demand for electricity is high. Confusion however did exist about the exact nature of "peak" and what constituted peak times.

Respondents provided many varied answers as to the time of day when peak occurs: 1pm, 2pm, 3pm to 5pm, 5pm to 7pm, 8 or 9 to 5 o'clock. Further discussion allowed other respondents to more accurately point out that peak occurred on hot days, usually in the summer, and on weekday afternoons because of operating businesses. Furthermore, there was some confusion regarding if peak is an everyday occurrence; some respondents were able to point that a more critical need occurred on the hottest days.

However, it is important to note that while confused about *when* Peak periods actually occur, most attendees understood that conservation actions taken during these "peak" hours offered the most value.

4.4.5 Awareness of Household Energy Use and Energy-Related Actions

Focus group respondents were generally aware of their household's energy usage, and had taken some actions to reduce or conserve energy. These actions can be categorized as measures or practices. Measures involve installing or purchasing more energy efficient equipment, while practices indicate a change in behavior. Their motivations for these actions are largely to reduce their electric bill.

Renovations provide a good time for customers to consider energy efficiency and insulation concerns. Several focus group participants mentioned installing more efficient windows or insulation, while others cited purchasing energy efficient or Energy Star appliances, or ceiling fans. Respondents also reported being more aware of their practices, such as turning off lights and setting the thermostat. *"There's a limit, but I try to conserve as much as I can or to follow the guidelines of what's more energy efficient."* The key here is to educate customers such as this motivated respondent, in what feasible energy reducing actions they can take. Further discussion of this topic will be presented in a later section.

An interesting anecdote, one respondent who once had metered time-of-use rates and then had the meter removed, continued her conscious effort to shift usage to non-peak times. *"After a year when I asked them to come and take the meter out, I was still conscious of remembering [about energy usage] because I kind of got into the groove of it, and now I still kind of do that."*

Not surprisingly, saving money is a key motivator for customers to be willing to change their usage. A focus group participant mentioned that she bundled up in the winter and layered on clothes so that she could save money by not turning up the heat. Yet, some customers seemed to understand that making a small sacrifice could be beneficial in the long run. While one respondent said, "*What would make me change my usage is money,"* most seem to be willing to change their electricity usage during peak times for other reasons - such as preventing the threat of brownouts. *"It's like if you don't do something, you're going to be sitting there reading your book with a flashlight."* Generally, respondents were willing to give up a little in order to maintain their overall comfort level. "*Unfortunately in general it takes altering my comfort level. I mean honestly, when I realize now I don't have power, that's going to make me…start to*

make a few more changes to get back to [my] comfort zone." One participant, however, was very adamant that there is enough available energy to not need reminders to shift or conserve energy, and that her culture of abundance could be maintained if people could figure out ways to be efficient and run businesses efficiently.

4.4.6 FYP NOW! and FYP Advertisements

During the focus groups, respondents were shown three FYP/FYP NOW! commercials with a frog (ceiling fans), a tortoise (compact fluorescent lighting), and a sea lion (energy efficient appliances). Almost all respondents had heard or seen at least one of the commercials.

Television commercials are an excellent way to reach a broad swath of customers, as evidenced by the number of focus group participants who say they have seen at least one of the FYP/FYP NOW! commercials. They are a good way to spark interest in ways to reduce energy consumption and remind residents to consider the ways they are currently using energy, *"Because when we were looking at the commercial at the time, now we're sitting here really focusing on it, it does bring to mind the things that you've done or the things that you do on a daily basis."*

Several respondents were able to associate Flex Your Power or Flex Your Power NOW! with turning off appliances until 7pm, prior to viewing the commercial during the focus group. However, the commercials may not present the messages in a **clear and memorable manner.** While the commercials are enjoyable to watch, the messages of FYP and FYP NOW! may be getting lost: *"Because they're so charming, with the little frog and all, you may miss the point and just like the commercial."* Another respondent admitted, *"I think the visuals are very clever but obviously the Flex Your Power didn't really register very much."* Most customers remember having seen the commercial, but only after viewing it during the focus group. The fact that participants were not able to mention FYP or FYP NOW! early on in the discussion without aid may be partially attributable to this reason (in addition to the reason that recall is aided simply by showing the commercial); recall of the commercial content is low because the presentation detracts from the message. [25]

The commercials need to clarify the need to conserve energy at Peak times as the message of "Flex Your Power NOW!" and communicate the possible consequences without the public's immediate action during an event[26]. When asked about what the word "NOW" meant, respondents offered mixed answers. Some interpreted "NOW" to mean *"starting now, starting at this time now, from here on out" or that the "NOW" was* ambiguous and could imply taking these actions all the time and not just during peak times. Furthermore, the commercials do not convey that a Flex Your Power NOW! event is an urgent call to action. *"The commercial wasn't explaining things to where it's like here we are in a major situation, Flex Your Power NOW!,*

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[25] It should also be noted that these commercials ran mostly in the summer of 2005. Since the evaluation was not conducted until the first quarter of 2006, awareness and recollection of the ads are likely lower today than they would have been during the summer of 2005.

[26] In an interview with Wally McGuire and ODC in December 2005, McGuire acknowledges the challenge of spurring customers to action without being threatening: "you don't want to call it an emergency but it is, so that sort of has to get resolved."

conserve, wash your clothes at seven o'clock. I mean that's a great message but it doesn't go very far."

However, even without the urgency, some focus group participants were able to grasp that Flex Your Power NOW! helps prevent situations such as brownouts. *"It reminds me of when we had such heavy usage and they were having the rolling brownouts, and everybody was trying to cut back so that we didn't have the brownouts."*

Focus group respondents also noted that the message to Flex Your Power NOW! did not convey how to look out for the event being called. The commercials present energy efficiency messages in line with Flex Your Power goals, and that when the audience hears "Flex Your Power NOW!", they should start taking conservation-related actions. Customers said that they wanted to know how to look for it so they could take those actions*: "[You know] When you see Flex Your Power NOW!, that you should do something or other, but it was pretty vague about what that might mean and where that message would come from."*

Someone thought that they had seen that ad before but without the FYP NOW! tag. Others observed that the commercials looked as if the FYP portion had been made first and the FYP NOW! tag was tacked on as an afterthought.[27]

Several focus group respondents also commented that they had seen the sea lion commercial before but assumed it was an energy commercial for an appliance or do-it-yourself store such as Lowe's or Best Buy.

4.4.7 Reactions to General Energy Messages

Another section of the focus group was dedicated to testing messages and understanding what messages would be effective in reaching customers. The messages were general statements geared towards assessing attitudes. Out of ten messages[28] presented, the following four appealed the most to participants:

1. If we all work together, we can make a difference
2. Saving electricity saves me money
3. Conserving electricity helps save our natural resources for future generations
4. There are simple and easy ways for me to save electricity

We asked respondents to rate all 10 messages on three aspects; first, about how strongly they agreed with the statement, how likely they were to take action because of the message, and how

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[27] These observations are essentially correct; FYP ads were created and were aired first, and then were later combined with the FYP NOW! message when the decision was made to link the two programs in name and funding. In the aforementioned interview, Wally McGuire states that, had funding been adequate, there would have been separate, independent messages. "The part that is difficult is to try to combine two messages in the same TV ad. Well, I can tell you for a fact we probably would have wanted to have alternating ads…"

[28] Additional messages included: *Even an individual can make a difference; The government can help promote energy efficiency and conservation; Individuals can make a difference in reducing brown- and black-outs associated with high electricity usage; Conservation is good for the environment; I think it is important to use only my fair share of natural resources – such as electricity;* and *It is important to my community that I save electricity – saving will help to do things like keeping lights on in our schools and businesses.*

strongly the message encouraged them to reduce their energy usage. Customers agreed most strongly with messages 1 and 2. Messages 2 and 4 were rated most likely to cause customers to take action and also most strongly encouraging to reduce energy usage. These messages together can remind customers that the ability to save electricity and make a difference is within their grasp, and that they can save money while doing so.

Of the 10 messages we presented to focus group participants, the most favored messages were 2 and 3. Not surprisingly, the idea of saving money appeals strongly to customers; however, respondents were also strongly pulled towards the idea of providing for future generations. They understand that it is important to conserve electricity for their children. However, as mentioned earlier, one respondent balked at the term "conservation" because, to her, it means, "lack of" and she is not accustomed to doing without. While it is possible that many customers may feel this way, the general opinion among focus group respondents is that conserving today means available resources for their future generations.

4.4.8 Additional Information Wanted

For those who recollect FYP NOW! or FYP, respondents say they have heard these messages on the radio, in bill inserts, on television, and stamped onto DMV mail. Customers generally agree with the approach taken, that the best ways to reach them are through bill inserts, the Internet, and typical media outlets (radio and television).

Their opinion about notification of alerts is to put them on the news or radio during commuter times. Currently, alerts are usually announced over the radio, but focus group participants feel that alerts should also be announced during local news television programs. In addition to this outlet, they also suggested direct emails, announcements running across the bottom of the television screen, and public service broadcasts.

Focus group respondents also noted that it is important to not have false alarms, else they would start to ignore the FYP NOW! call to action. They varied in opinion about how frequently they would accept a FYP NOW! event, and responses ranged from three days a year to 10.[29]

Some focus group respondents questioned why the actions promoted by FYP NOW! involved appliances that are often fueled predominantly by gas, such as ranges/ovens and clothes dryers, since gas appliances do not count towards electricity usage.

Focus group participants also said they would like information on how much it costs per appliance to run. Another suggestion brought up by several respondents is to dedicate some efforts to educating children about energy efficiency for two main reasons: most children do not think about energy use (such as turning off lights), and children tend to quickly absorb and adopt such messages (an example of this is their adoption of recycling efforts).

[29] According to the schedule of FYP NOW! events on the fypower.org website, there were 10 events called in 2005, between July 14 to October 14.

4.5 Chapter 5: Process Evaluation Survey Results

4.5.1 Introduction

As part of the effort to conduct a process evaluation of the California IOUs' Flex Your Power NOW! (FYP NOW!) program, Opinion Dynamics (ODC) fielded a process evaluation survey of California residents, designed to gather quantitative data on current messaging of FYP NOW! and potential future messaging, as well as changes in behavior attributable to these program messages.

Overall findings from the evaluation survey are presented briefly below, and are further expanded upon in subsequent sections of this report. Sections are noted whether data reflects responses to unaided, aided, or educated (aka super-aided) questions from the survey (see survey methodology below for more detail).

4.5.2 Survey Methodology

Using a Random Digit Dialed (RDD) sample, ODC conducted interviews with 1,203[30] customers distributed evenly across the three electric IOUs' territories – Pacific Gas & Electric (PG&E), Southern California Edison (SCE), and San Diego Gas & Electric (SDG&E). While ODC was provided a list of zip codes comprising each utility's territory, because of existing overlap for certain zip codes, ODC opted to use self-reported responses from the respondents to determine their utility. Interviews were conducted between March 23, 2006 and April 3, 2006, and each interview took 20 minutes on average to complete.

We weighted the overall data based on 2004 numbers of housing units for each IOU territory as provided by the CPUC. These weights are provided below:

Table 4.5-1: Weighting the Number of Completes by Utility

Utility Territory	Actual Number of Completes	Percentage Weights	Weighted Number of Completes
PGE	403	46.2%	556
SCE	400	42.3%	509
SDG&E	400	11.5%	138

The survey instrument was divided into five discrete sections. The first section – *unaided awareness* - did not prompt with any specific names, instead probing for unaided responses in order to gauge awareness and respondent knowledge of energy-related issues. The second section – *aided awareness* - however, provided prompts to the respondents, by asking, for example, about specific programs or campaigns by name. Unaided responses remove some of the bias associated with respondents trying to please the interviewer, or not wanting to appear ignorant of the subject being discussed. Comparing these responses with aided awareness also allows reviewers to better understand the 'true' level of awareness. Is the respondent merely remembering a key word or phrase, or is are they truly aware of the concept being discussed.

[30] Because of interviewing timing, an additional 3 respondents in the PG&E territory completed an interview, bringing the actual total number of completes to 1,203 and for PG&E to 403.

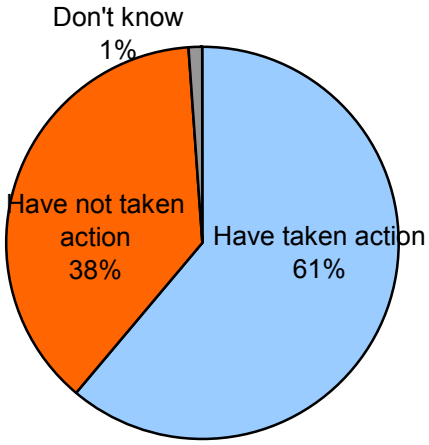
However, while we note that recognition tends to be higher when given specific information, it is important to understand that this prompting helps respondents give more complete answers to the specific program/campaign.

In the third section - *educated awareness* - respondents were read a brief description of Flex Your Power and Flex Your Power NOW!. This was done to increase respondents' understanding of the campaigns in order to ask more specific questions.[31] The final two sections were dedicated to marketing / communication channels and demographics.

4.5.3 Actions to Conserve Energy

Before exploring the FYP and FYP NOW! efforts in detail, it is important to understand respondents' actions and knowledge of energy-related issues. During the past year, 61% of all survey respondents say they have done something to reduce their electric or natural gas bill, or to conserve energy in their home. (See Figure 4.5-1)

Figure 4.5-1: Whether or Not Respondents Have Done Anything to Reduce Electric/Natural Gas Bills or Conserve Energy in the Past Year



QU1. Have you done anything to reduce your electric or natural gas bills or conserve energy in your home over the past year?
Base = Total Weighted Results

As Table 4.5-2 below shows, the actions that respondents say they have taken to reduce their energy bills vary from conservation-type behaviors to installing energy efficiency measures. Almost one-third of respondents who have taken action say they have installed energy efficient appliances or windows (32%), 13% mention purchasing low watt/fluorescent bulbs. Conservation actions mentioned include turning off equipment when not in use (29%) or adjusting the thermostat (17%). Three percent of respondents (unaided) say they conserve at

[31] The paragraph that was read to respondents for the educated portion of the survey is as follows: *"While the Flex Your Power campaign is a year round message, encouraging customers to use energy efficiently, Flex Your Power NOW is a "Call to Action". The Flex Your Power Now! message tells you that when you hear an alert telling you that it is a "Flex Your Power Now! Day" energy needs* ***that day*** *are high and electricity supplies are low. When this occurs, taking immediate conservation actions is critical in helping to meet the electricity needs of California."*

specific times of the day and that they do not use appliances during peak hours—central messages of the Flex Your Power! campaign.

SCE respondents are more likely than PG&E or SDG&E respondents to say they have installed energy efficient appliances/windows or to have shut off equipment when not in use. However, PG&E respondents are more likely to conserve energy by closing the windows and reducing drafts, while SDG&E customers are more likely to adjust the thermostat and purchase low watt or fluorescent lighting.

Table 4.5-2: Actions Taken to Reduce Bill or Conserve Energy

QU2. (of those who have taken action) What have you done? (multiple response)	Total Weighted Results	PG&E (n=254)	SCE (n=234)	SDG&E (n=248)
Buy/install energy efficient appliances/windows (FYP)	32%	28%	37%*	28%
Shut off equipment/appliances when not in use (FYP)	29%	25%	35%*	25%
Adjust temperature on AC/Heat (FYP NOW!)	17%	18%	15%	22%°
Conserve energy/close windows/fix drafts (FYP)	16%	20%*	12%	13%
Purchase low watt/fluorescent bulbs (FYP)	13%	13%	11%	19%°
Cut down use of appliances	7%	9%	6%	6%
Conserve at specific times/don't use appliances at peak hours (FYP NOW!	3%	3%	3%	4%
Other	3%	3%	3%	3%

* Indicates a statistically significant difference compared to all comparison groups at the 95% level
^ Indicates a statistically significant difference compared to the PG&E comparison group at the 95% level
° Indicates a statistically significant difference compared to the SCE comparison group at the 95% level.

4.5.4 Unaided Awareness

Awareness and Participation in Utility Programs/Campaigns

It is important to understand **unaided** awareness and participation levels in any energy-related programs or campaign effort. Overall, 36% of all survey respondents say they are aware (unaided) of at least one energy conservation program or campaign underway in California. Unaided awareness is significantly higher among SDG&E (40%) respondents than among SCE respondents (32%); 39% of PG&E respondents say they are aware of ongoing energy-related efforts (not statistically significant at the 95% confidence interval). However, it should be noted the difficulty in achieving pure, unaided awareness figures. Even asking respondents if they remember any energy conservation efforts[32] means they might possibly be "biased" into saying they do. However, distilling unaided awareness by removing those in the follow-up question who "don't know" the name of campaigns/programs from those who originally said yes, leads us to 13% awareness overall and a statistically significant higher 16% each for PG&E and SDG&E compared to 10% among SCE customers.

[32] The questions asked of respondents used to determine "unaided" awareness were: Are you aware of any energy conservation programs or campaigns underway in California?; which, for affirmative responses, was followed by: Can you tell me the name of any of these programs or campaigns that you remember?

Only three people out of the those who received the follow-up question about campaign names because they said they were aware mentioned the Flex Your Power campaign **unaided**. One person mentioned Flex Your Power NOW!

Table 4.5-3: Unaided Awareness of Energy Conservation Programs/Campaigns

% of respondents who said…	Total Weighted Results	PG&E (n=403)	SCE (n=400)	SDG&E (n=400)
Yes, aware of any energy conservation programs or campaigns underway in California	36%	39%	32%	40%°
Don't know the name of any of these programs	23%	23%	22%	25%
"Unaided" Awareness	**13%**	**16%**	**10%***	**16%**

* Indicates a statistically significant difference compared to utility comparison groups at the 95% level.
° Indicates a statistically significant difference compared to the SCE comparison group at the 95% level.

The top source of unaided awareness of energy-related programs or campaign efforts is contact from the Utility (35%), either via a mailing or a customer service representative, followed by television advertising (30%), newspaper advertising (18%), and radio advertising (9%). Newspaper advertising seems to have had a more pronounced effect for SDG&E than for PG&E (statistically significant difference compared to PG&E only) and SCE. Somewhat surprisingly, a few more respondents were able to cite FYP/FYP NOW! as the source of their awareness of energy-related programs/campaigns than those mentioning the effort itself. (See Table 4.5-4)

Table 4.5-4: Sources of First Awareness (Unaided) of Utility Programs/Campaigns

QU7. (of those aware) How did you first become aware of these programs or campaigns?	Total Weighted Results	PG&E (n=156)	SCE (n=131)	SDG&E (n=162)
Utility contact (mailing/customer rep.)	35%	34%	37%	34%
Television advertising	31%	33%	29%	27%
Newspaper advertising	17%	15%	17%	23%^
Radio advertising	9%	10%	8%	9%
Friend, family or colleague	6%	6%	6%	6%
In-store display	5%	6%	3%	6%
Billboards	2%	3%	2%	4%
Community agency, home/trade show	2%	3%	2%	2%
Internet	2%	1%	3%	3%
FYP/FYP NOW! campaign	**2%**	**2%**	**2%**	**1%**
Other	1%	1%	1%	2%

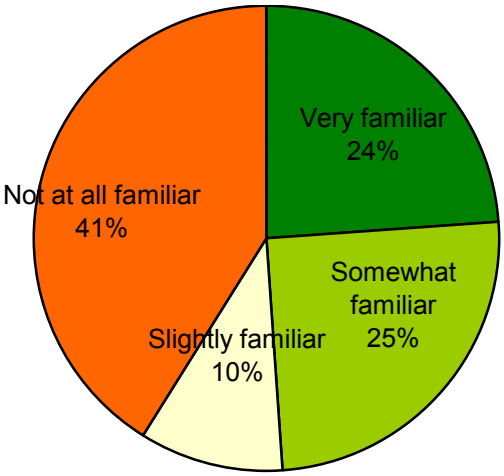
^ Indicates a statistically significant difference compared to PG&E at the 95% level.

Out of 36% of those who said they were aware (unaided) of any programs/campaigns, 14% (or 5% of all survey respondents) have actually participated in one or more programs/campaigns during the past year. While 27% of those who have participated do not recall the name of the program, 19% recall (unaided with the program name) participating in the Energy Star Program, 16% in the A/C Cycling or Summer Discount Program, 8% in the 20/20 program and 10% of PG&E respondents in the 10/20 program. Few program participants recall (unaided with the program name) taking part in FYP (2%) or FYP NOW! (2%).

4.5.5 The Concept of "Peak"

The concept of "peak" as it relates to electricity is familiar (very and somewhat) to one-half of all survey respondents. Specifically, 25% report being very familiar and 26% report being somewhat familiar, while 10% say they are slightly familiar and 41% not at all familiar with the concept. (See Figure 4.5-2)

Figure 4.5-2: Familiarity with the Concept of Electric "Peak"



QU8. How familiar are you with the concept of "peak" as it relates to electricity? Base = Total Weighted Results

Among those at least slightly familiar or more with the concept of peak, a majority feels it usually occurs between 3 pm and 7 pm (64%), on weekdays (78%) and/or in the summer (71%). Notably, 25% of all respondents (or, 50% of those who said they were familiar with peak) were able to mention all three – summer, weekdays, and afternoons. The main sources of information about peak are television (43%), followed by bill inserts (22%), newspapers (16%), and radio (13%).

While 59% of all respondents are at least slightly familiar with concept of peak, 51% have actually heard of the need to conserve electricity on certain key days of the year. (This enforces the notion that respondents who say they are "slightly familiar" have only a very vague understanding and may in fact be using the "slightly familiar" as an "opt-out" response instead of admitting that they do not know.) The top source for this type of information is television (65%) first and foremost, followed by radio (21%), newspapers (19%), and bill inserts (12%).

A large majority (79%) of all survey respondents feel they are able to reduce their electrical usage on summer weekday afternoons. Whether someone is home during typical weekday afternoons does not make any statistically significant difference in respondents feeling like they are able to reduce their usage during these times.

Of the 17% who do not feel they are able to reduce their electrical usage during such a peak, the most mentioned reason is, they believe they cannot reduce or shift usage any further (45%), followed by they are not home (16%) at the time, or they don't think reducing their usage would

make a difference (13%). Relatively few mention they do not want to (10%), or that they don't have enough information on how to shift (2%).

Among survey respondents who have heard of the need to conserve electricity on certain key days and who have done something to reduce their electric or natural gas bills or conserve energy in their home over the last year, or who are at least somewhat familiar with the concept of peak, 54% (28% of all survey respondents) report actually having taken action to conserve during specific times when the demand for electricity was high and the reserves were low. The question remaining is whether those individuals reporting taking actions actually took the actions - at peak times. For instance, did watching the FYP NOW! advertisement on television prompt viewers to shift their use of appliances – that same day – to after 7:00 pm.

4.5.6 Aided Awareness

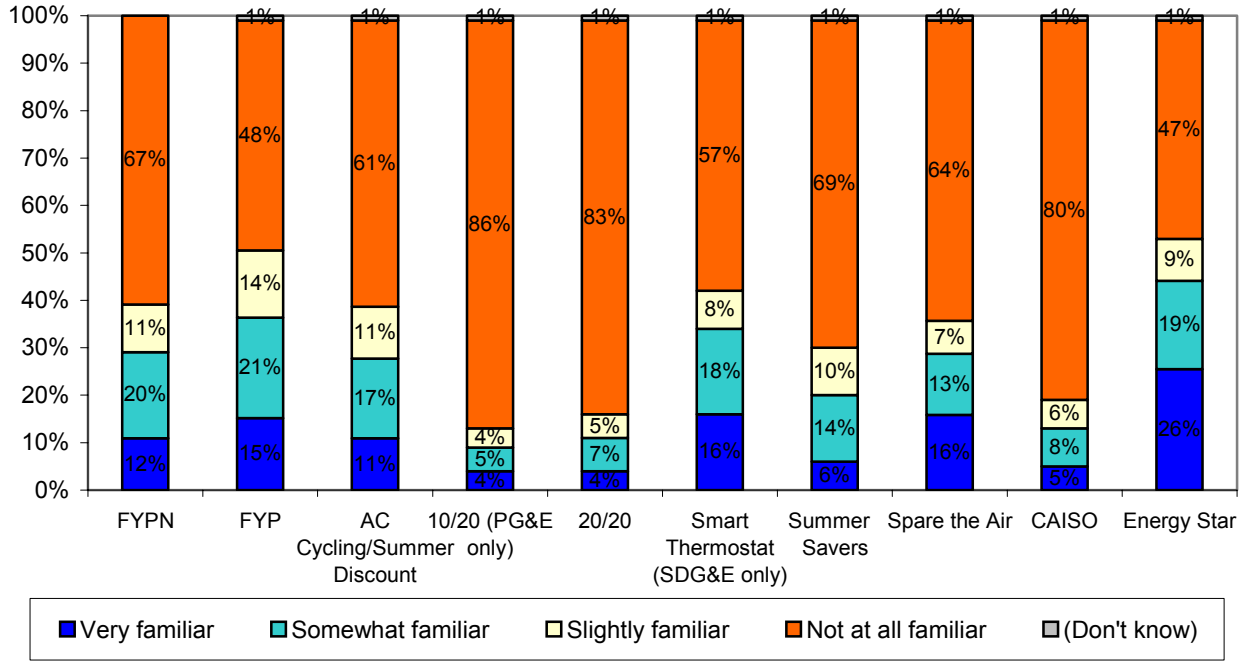
The previous section presented unaided awareness findings and this section of the report focuses on aided data – where questions posed to respondents included specific mention of campaigns or programs.

Familiarity with Utility Programs/Campaigns

As Figure 4.5-3 below shows, aided familiarity with FYP NOW! is high relative to other utility programs, with 32% of all survey respondents familiar with the term. More specifically, 12% are very familiar, 20% are somewhat familiar, 11% are slightly familiar, and 57% are not at all familiar with the term FYP NOW!. SCE customers are significantly more familiar (very or somewhat) with FYP NOW! compared to PG&E customers, which may indicate the effects of the program's efforts in SCE territory, although other factors may be responsible aside from the program's efforts, such as regional differences, media weight, and creative approach, as well as localized emergencies in SCE territory.

Energy Star has the highest aided familiarity (45%), followed by Flex Your Power (36%), and then Smart Thermostat among SDG&E respondents (34%). Flex Your Power NOW! ranks fourth in program familiarity.

Figure 4.5-3: Familiarity with FYP NOW!, FYP, and Other Energy Utility Programs/Campaigns



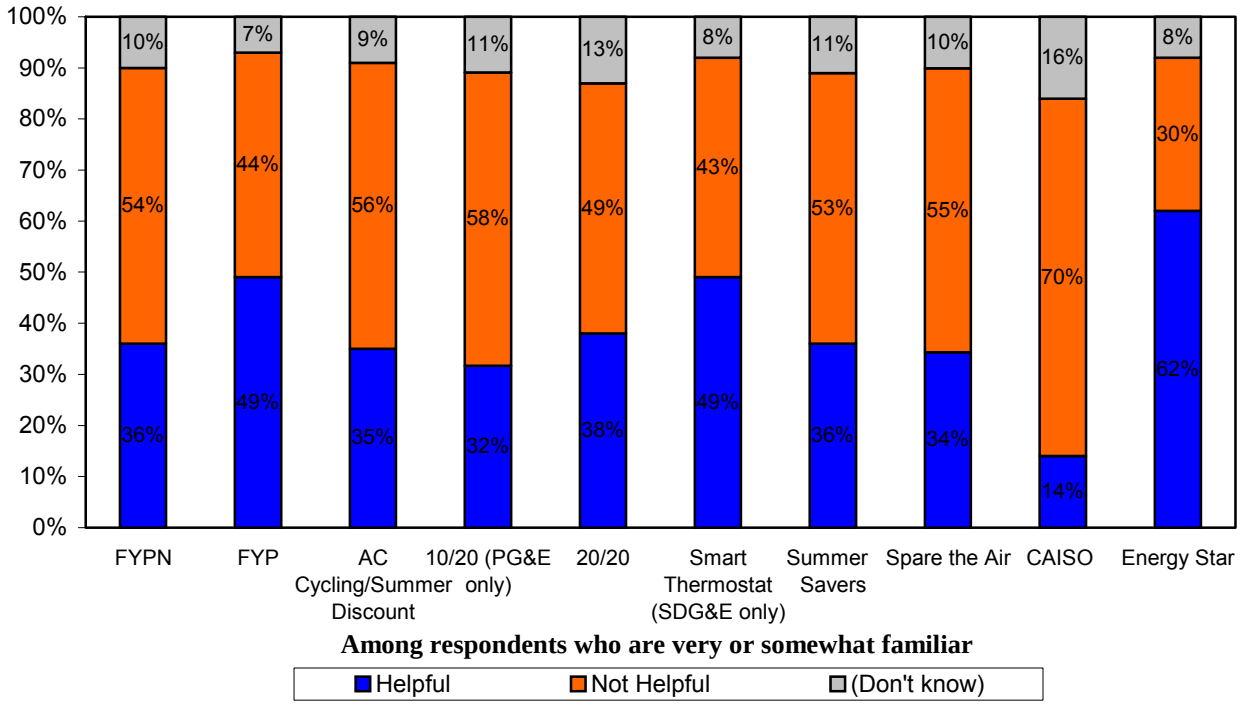
QA1a-k: I'm now going to read you a list of terms. You may have already mentioned some of these but I want you to please tell me whether you are very familiar, somewhat familiar, slightly familiar, or not at all familiar with the following.
Base = Total Weighted Results (except where noted)

4.5.7 Helpfulness of Utility Programs/Campaigns

Respondents who are very or somewhat familiar with each program say that Energy Star (62%), FYP (49%) and Smart Thermostat (49% SDG&E only) are the top programs at helping them lower their energy use. Thirty-six percent of respondents who are familiar with FYP NOW! say that it is helpful, ranked fifth after 20/20. Since Flex Your Power NOW! ranks third in familiarity but (tied for) fifth in helpfulness, future efforts should continue reinforcing messages to help them lower energy usage. Flex Your Power, an education campaign with a focus on energy efficient measures, is considered helpful by most in reducing their energy usage second to Energy Star. (See

Figure 4.5-4)

Figure 4.5-4: Helpfulness of FYP NOW!, FYP, and Other Energy Utility Programs/Campaigns



QA2a-k: Has the ____ program/campaign helped you lower your energy use? Base = Very or somewhat familiar with the specific program, varies

4.5.8 Participation in Energy Programs/Campaigns (Aided Responses)

Overall, 10% of all survey respondents say they have participated in FYP NOW! Compared to other utility programs, FYP NOW! ranks fifth behind Energy Star (24%), FYP (16%), Smart Thermostat (16%, SDG&E only), and Spare the Air (13%). (See Table 4.5-5)

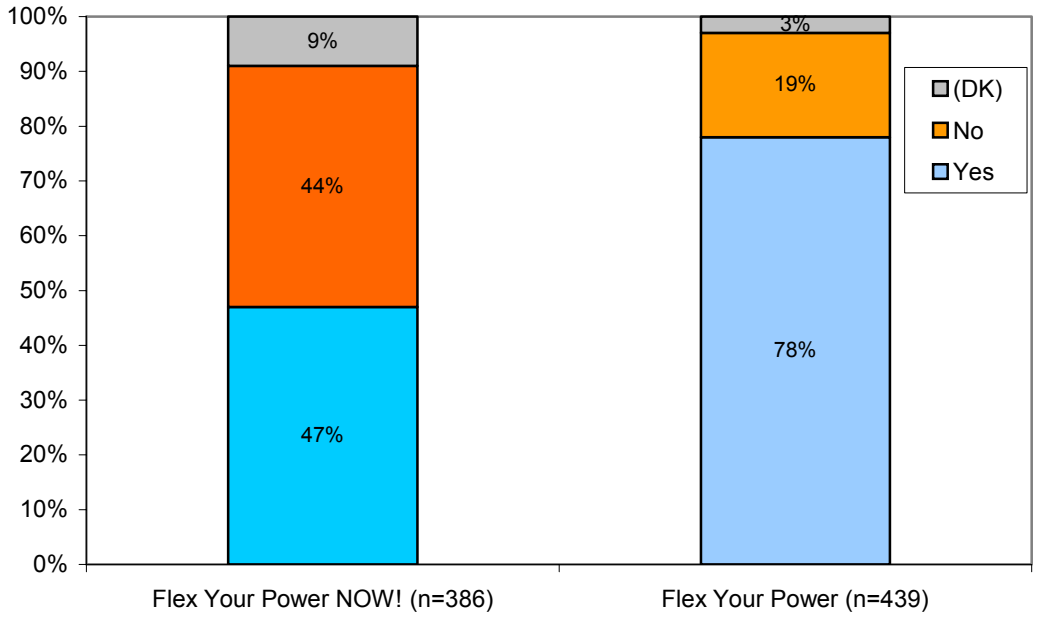
Table 4.5-5: Participation in FYP NOW!, FYP, and Other Energy Utility Programs/Campaigns

(among respondents very or somewhat familiar) QA3. Did you participate in …?	Total Weighted Results
Energy Star	24%
Flex Your Power	16%
Smart Thermostat (SDG&E Only)	16%
Spare The Air	13%
Flex Your Power NOW!	**10%**
10/20 (PG&E Only)	4%
Air Conditioner Cycling/ Summer Discount	5%
Summer Savers	5%
20/20	4%

4.5.9 Ad Recall Among Respondents Very or Somewhat Familiar

FYP! messages do not have quite the same recall as FYP advertisements. Among respondents *very or somewhat familiar with FYP*, the vast majority (78%) have seen or heard an FYP advertisement (30% of all respondents). Among respondents *very or somewhat familiar with FYP NOW!*, 47% have seen or heard a FYP NOW! message (15% of all respondents). Note that this is not intended to be a recall of an FYP NOW! alert, which will be discussed in a later section. (See Figure 4.5-5) It is worthwhile to note for our discussion related to FYP/FYP NOW! ads that there is very likely respondent confusion in regards to when the actions are supposed to be taken. Because a "NOW" ad can be mistakenly interpreted as a command to take action the day the respondent heard the *advertisement* (instead of when the actual event occurs).

Figure 4.5-5: Recall Hearing or Seeing Messages/Advertisement for Each Campaign
Among Respondents Very or Somewhat Familiar with the Program



QA12. You mentioned that you are familiar with Flex Your Power NOW!. Do you ever recall hearing or seeing a message regarding Flex Your Power NOW!? Base = Very or somewhat familiar with FYP NOW!,
QA7. You mentioned that you are familiar with Flex Your Power. Do you ever recall hearing or seeing a Flex Your Power advertisement? Base = Very or somewhat familiar with FYP

4.5.10 Media Channels for General FYP NOW! Messaging

Television is the media by which most respondents get their FYP NOW! (61%) and FYP (64%) messages/advertisements, followed by utility bills, radio and newspapers. The vast majority of respondents who learn about FYP NOW! via the television or radio have seen or heard an advertisement (67% and 68% respectively), a news report (8% and 6%), or both (18% and 15%), indicating that the advertisements – primarily television – are an effective way to reach audiences in a memorable manner. (See Table 4.5-6)

Table 4.5-6: Message/Advertisement Media Channels and Type of Programming Where FYP/FYP NOW! Ad Seen/Heard on TV or Radio

	Flex Your Power NOW!	Flex Your Power
Television	61%	65%
	67% advertisement / *8% news report* / *18% both* / *7% DK*	
Utility Bill	35%	42%
Radio	26%	25%
	68% advertisement / *6% news report* / *15% both* / *10% DK*	
Newspaper	14%	18%
Magazine	--	8%
Website/online	--	1%
Billboard	--	1%
Other	1%	1%
DK/Refused	4%	4%

QA13. Did you see or hear a Flex Your Power NOW message? Base = Heard or saw message
QA14a. When you saw the Flex Your Power NOW message on television do you remember if it was an…? Base = Television
QA14b. When you heard the Flex Your Power NOW message on the radio do you remember if it was an…? Base = Radio
QA7. Did you see or hear or read a Flex Your Power advertisement? Base = Heard, saw or read an advertisement,

4.5.11 Message Recall and Actions Taken from *Just* the FYP Ad

Table 4.5-7 below breaks down the messages that survey respondents recall when they heard or saw a Flex Your Power advertisement. Although, some FYP ads run alone and some others are for FYP NOW! only, most ads were run with the combined campaign in order to leverage resources. Thus, the difficulty in interpreting the difference in recall from the FYP ad *only* when the ads have combined messaging should be noted.

While reduction in peak load is the goal of the FYP NOW! campaign and the goal of FYP is to save energy through energy efficiency, the largest percentage of respondents remember the message of the FYP ad as "conserve energy" (46%). Fewer respondents remember messages such as use major appliances in the morning or at night (12%), to shut off unnecessary appliances/equipment (8%), change thermostat settings (7%), use fans to cool house (4%), avoid a brownout (2%), and/or to pull window shades/curtains (2%); some of these actions (particularly when to use appliances) fall more along the lines of the types of actions FYP NOW! promotes. In terms of more long-term messages, 5% remember the message to buy/install energy efficient equipment and/or 2% remember a message to get an energy audit.

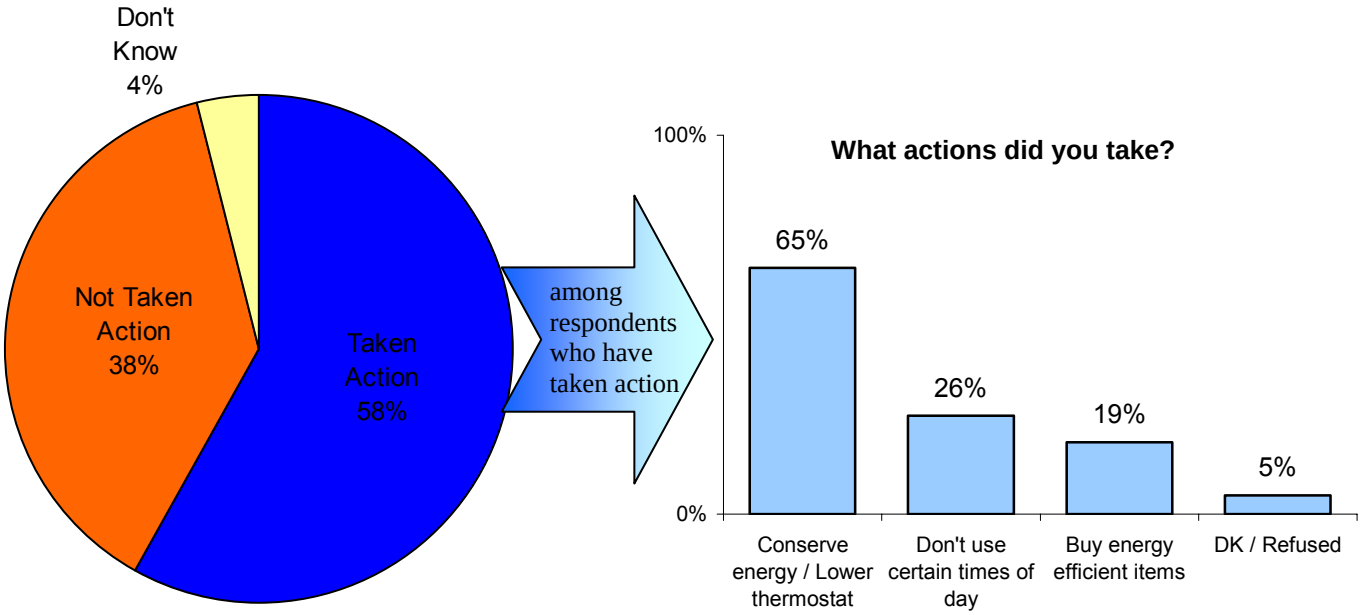
Table 4.5-7: Recall of Flex Your Power Ad Message

	FYP Ad Messages
Conserve energy	46%
Use major appliances in early morning or at night	12%
Shut off unnecessary appliances/electric equipment	8%
Change thermostat settings	7%
Conserve energy in general	5%
Buy/Install energy efficient equipment	6%
Use fans to cool house	3%
Turn off unneeded lights	2%
Avoid a brownout	2%
Get an energy audit	2%
Pull window shades/curtains	2%
Just Heard Flex Power Now	2%
Other	1%
DK/Refused	32%

QA9. What messages do you remember hearing from what you saw or heard for Flex Your Power? Base = Heard, saw or read an FYP advertisement

Among respondents who have seen or heard an FYP ad, 58% have taken action based on the information they heard in the ad. Among the respondents who have take action, most have conserved energy by lowering their thermostat (65%), and 19% bought energy efficient items or windows. One quarter, 26%, have taken some peak reduction actions, such a not using appliances during certain times of the day. (See Figure 4.5-6)

Figure 4.5-6: Whether or Not Respondents Have Taken Action as a Result of Information Learned from an FYP Ad



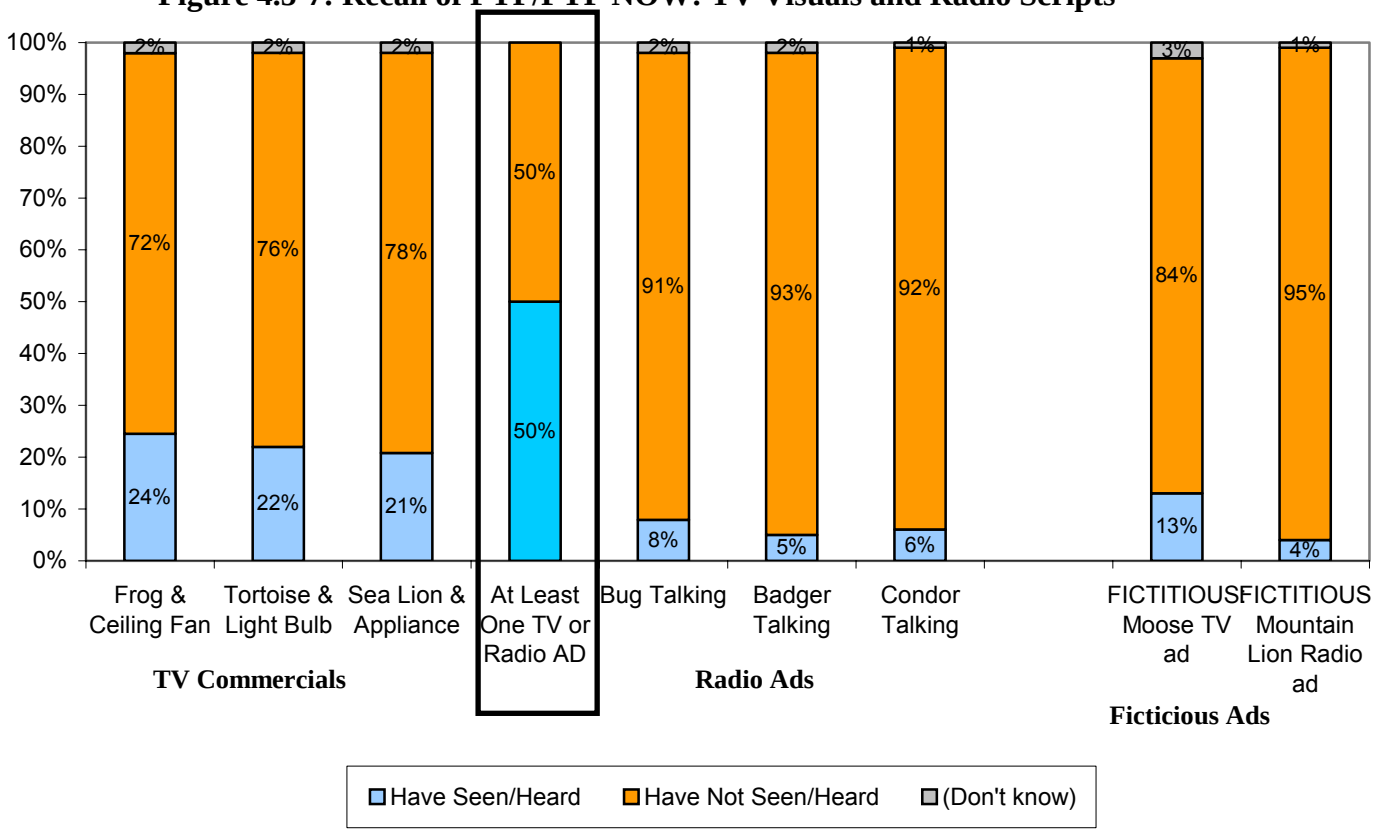
QA10. Have you taken action as a result of the information you learned from the Flex Your Power ad? Base = Heard, saw or read an FYP advertisement

QA10a. What have you done? Base = Have taken action

4.5.12 Recall of FYP/FYP NOW! TV Ad Visuals/Radio Scripts

Recall of at least one FYP and FYP NOW! ad is high, with 50% of all respondents saying they recall at least one particular TV or radio advertisement. Specifically, the Frog TV commercial garnered the highest recall, with 24% of all survey respondents having seen that ad. This is closely followed by 22% who have seen the Tortoise TV ad and 21% who have seen the Sea-Lion TV ad. Recall of radio ads is lower, only in the 8% to 5% range. Descriptions of fictitious ads were included in the survey and the percentage of people who recall the fictitious Moose TV ad was 13% and the fictitious Mountain Lion radio ad was 4%. Although this provides a reason for caveat when interpreting these recall figures, these are lower percentages than the recall for actual ads from the respective medium (TV versus Radio). (See Figure 4.5-7)

Figure 4.5-7: Recall of FYP/FYP NOW! TV Visuals and Radio Scripts



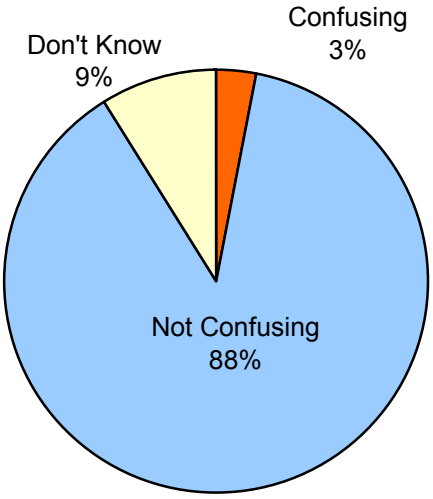
A15. Do you remember seeing a television commercial where…?
A16. Do you remember hearing an ad on the radio involving…
Base = Total weighted results

Although recall of a particular FYP and FYP NOW! ad is relatively high, attributing the source of the message is much lower. Only 26% of respondents who recall at least one of the visuals/scripts in the figure above (or 4% of all respondents) remember the name of the campaign as Flex Your Power and only 4% (or 1% of all respondents) remember the campaign name Flex Your Power NOW!.

4.5.13 Message Recall and Actions Taken from FYP/FYP NOW! TV Ad Visuals/Radio Scripts

As Figure 4.5-8 shows, among the respondents who recall at least one of the TV ads or radio scripts, the vast majority (88%) did not report finding the ad(s) or their message(s) confusing or difficult to understand. However, this does not mean that the user actually understood the advertisement, rather that they think they understood the message.

Figure 4.5-8: FYP/FYP NOW! TV Visuals and Radio Scripts



QA21. Was there anything confusing or difficult to understand about the message in the advertisement(s) you saw or heard? Base = Recall at least one specific TV Commercial or Radio Ad

Table 4.5-8 below breaks down the messages that survey respondents recall hearing in the particular TV and radio ads, and what specific actions they took as a result.

After exposure to at least one of the TV visuals or radio scripts, a large percentage of respondents (44%), remember a general message to conserve energy. Sixteen percent of all respondents exposed to an ad took action to conserve energy in general; 11% shifted electricity to off peak. Other specific and immediate actions were in the 1% to 9% range of survey respondents exposed to an ad. Specific actions included changing thermostat settings to 78 degrees (7%), shutting off unnecessary appliances/equipment (4%), using fans to cool house (4%), using major appliances in the morning or at night (3%), or pulling window shades/curtains (1%). In terms of more long-term messages, 9% bought or installed energy efficient equipment and/or 1% got an energy audit.

Table 4.5-8: Message Recall and Actions Taken from FYP/FYP NOW! TV Ad Visuals/Radio Scripts

(among respondents who recall at least one specific actual TV or radio ad)	Message Recall	Actions Taken
Conserve energy in general	44%	16%
Shift electricity use/using appliances to off-peak	11%	11%
Buy/Install energy efficient equipment	8%	9%
Shift electricity usage in general	7%	6%
Change thermostat settings to 78 degrees	4%	7%
Shut off unnecessary appliances/electric equipment	5%	4%
Use fans to cool house	3%	4%
Turn off unneeded lights	3%	5%
Use major appliances in early morning or at night	2%	3%
Pull window shades/curtains	1%	1%
Get an energy audit	<1%	1%
Other	1%	-
DK/Refused	30%	1%

QA18. What messages do you remember hearing in these commercials? Please be as specific as you can. Base = Recall at least one specific TV Commercial or Radio Ad

QA19a. As a result of hearing or seeing these messages, did you take any of the actions that the commercials promoted? A19b. Which of these actions did you take? Base = Repercentaged off recall at least one specific TV Commercial or Radio Ad

As Table 4.5-9 shows, among the respondents who took specific actions, the majority (between 44%-100%) usually take the action every day, while 4% to 45% take the action only when demand is high and reserves are low.[33] This is disconcerting as it indicates that the FYP Now! message is only being partially understood by consumers.

Table 4.5-9: When Actions Were Taken from FYP/FYP NOW! TV Ad Visuals/Radio Scripts

	Shift electricity use/using appliances to off-peak (n= 64)	Change thermostat settings to 78 degrees (n=43)	Turn off unneeded lights (n=29)	Shut off unnecessary appliances/ electric equipment (n=26)	Use fans to cool house (n=25)	Use Major appliances in early morning or at night (n=19)	Pull window shades/ curtains (n=6)
Every day	54%	45%	100%	85%	44%	64%	49%
Weekdays only	23%	9%	--	--	--	28%	--
After hearing commercial only	4%	--	--	--	4%	--	--
When demand is high & reserves low only	11%	11%	--	10%	4%	8%	45%
Other	4%	28%	--	--	28%	--	--

QA19a. As a result of hearing or seeing these messages, did you take any of the actions that the commercials promoted? A19b. Which of these actions did you take?

A20. [FOR EACH A19b=2, 5, 7, 8, 9, 10, 11, 12] Would you say that you take the action every day, only on weekdays, only when you hear the commercial/ad, only when the electric demand is high and reserves are low, or other? Base = Took specific action, n=varies

[33] Note that sample sizes are small in some cases and thus caution should be exercised when interpreting these results.

4.5.14 Distinguishing Between FYP and FYP NOW!

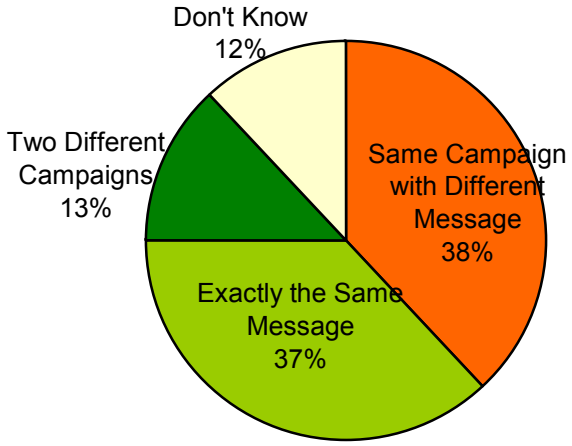
Table 4.5-10 below breaks down the messages that respondents associate with the terms Flex Your Power and Flex Your Power NOW!. A substantial percentage (40%) of survey respondents correctly associate the term FYP with the need to conserve/save energy. Fewer respondents associate FYP with the need to use power wisely (12%), or with the need to use power during certain hours (8%). The term FYP NOW! is associated, correctly again, with the immediate need to conserve by 28% of survey respondents. Fewer respondents associate the term FYP NOW! with a general need to conserve energy (13%), or to use only during certain hours (3%).

Table 4.5-10: Respondent Association with the Terms "Flex Your Power" and "Flex Your Power NOW"

QA22. What do you think of when you hear the term…"Flex Your Power"? "Flex Your Power NOW"? (total weighted results)	Association with FYP term	Association with FYP NOW! term
Conserve/save energy	40%	13%
Conserve Now	-	28%
Use power wisely	12%	-
Use certain hours/Reduce energy during peak hours	8%	3%
Other	7%	10%
Nothing	<1%	1%
DK/Refused	36%	45%

When hearing both terms, 38% of all respondents correctly believe that FYP and FYP NOW! are part of the same campaign, but with a different message. Nearly as many believe that they are exactly the same message, which supports that finding that there is not enough differentiation being presented to reduce the confusion between FYP ads and FYP NOW! messages. Few respondents (13%) believe that they are two different campaigns. (See Figure 4.5-9)

Figure 4.5-9: Flex Your Power Versus Flex Your Power NOW



QA23. If you heard the term Flex Your Power Now and then Flex Your Power, would you think that these two were…?
Base = Total weighted results

Among the respondents who recognize FYP and FYP NOW! as having different messages or being two separate campaigns, a net of about 48% recognizes the differences in the messages, while 43% do not know what is the difference. (See Table 4.5-11)

Table 4.5-11: Difference between FYP and FYP NOW!

(respondents who think they are not the exact same message) QA24. What do you think is the difference?	Difference
One is now - the other is whenever	21%
FYP NOW! is right away	20%
FYP is conserve everyday	5%
The word now	4%
Other	7%
DK/Refused	40%

The majority of survey respondents (63%) understand that the word "now" in FYP NOW! means to take action immediately; however, the issue mentioned before that taking action "NOW!" applies only after hearing an *alert* and not an FYP NOW! message. (See Table 4.5-12)

Table 4.5-12: The Meaning of the Word NOW in FYP NOW!

QA25. What does the word "NOW" in the term Flex Your Power NOW mean to you?	Total Weighted Results
Immediately/right away	63%
Save energy/conserve	9%
Other	4%
DK/Refused	26%

4.5.15 Educated Awareness

Flex Your Power NOW! Public Service Announcements / Alerts

The third section of the interview provided a description of Flex Your Power NOW! alerts so that respondents would be able to distinguish between an alert and an advertisement when discussing recall of alerts.

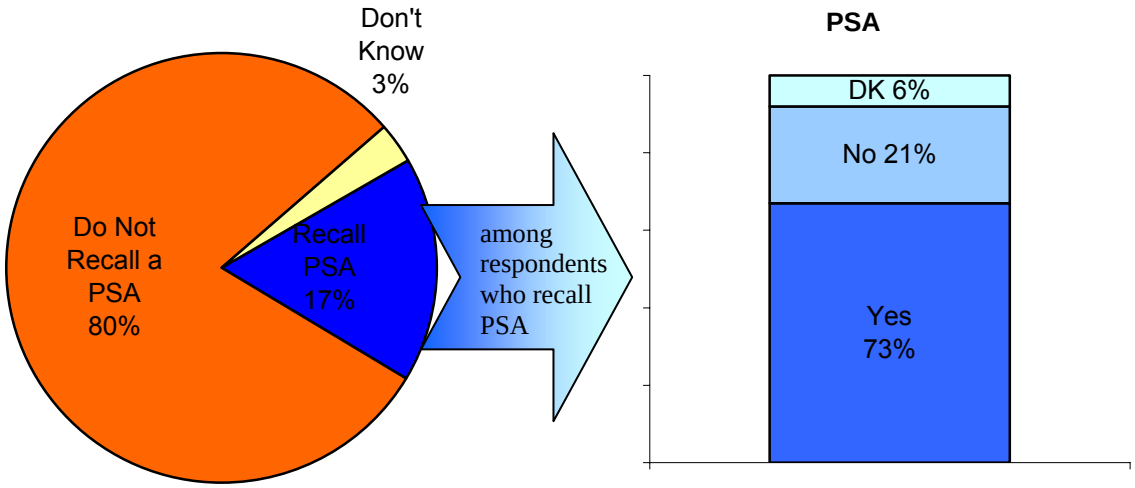
We know that the majority of alerts were disseminated via radio, but it is not clear from our discussions with program staff how many alerts were broadcasted on television or if they ever were broadcasted on TV. Therefore, we have removed respondents who said they saw the alert on TV only (322 respondents) from the group of respondents who identify having seen or heard an alert.

4.5.16 PSA Recall and Response

Overall, 17% of all respondents say they have seen or heard a public service announcement (PSA) or an alert asking them to Flex Your Power NOW. Among these respondents, 67% (or 12% of all survey respondents) said they were able to reduce their electric usage. This leaves 6% of all survey respondents who, even though they saw/heard a PSA, were not able to reduce their

usage. Combine this with the 83% of all survey respondents who do not recall or don't know if they have ever seen or heard a PSA, for a total of 89% of all survey respondents are not reducing their usage on critical days. These critical non-responder segments will be explored further in later sections of this report. (See Figure 4.5-10)

Figure 4.5-10: Recall of FYP NOW! Public Service Announcement



QE1. Have you ever seen a heard a public service announcement telling you that your help was needed TODAY and it was time to "Flex Your Power NOW!"? Base = Total weighted results
QE3. After hearing that it was a day to Flex Your Power NOW!, were you able to reduce your electric usage? Base = Respondents who recall PSA

Originally, 75% of respondents said they heard the PSA on TV, while 31% heard it on the radio. These results are disconcerting as the majority of FYP NOW! Alerts were on the radio, not the television. Alerts through television would have been given by weathermen on the local news. As such, these results indicate that there is a great deal of confusion related to the ads for FYP NOW! and actual alerts. Citizens seem to be responding and taking action when they see the FYP NOW! commercials, not when they hear the "Call to Action".

For this reason, we have removed respondents who claimed to have seen an alert by TV only, although seeing the alert by newspaper is also suspect. Among respondents who have heard or seen an FYP NOW! PSA, radio is the medium by which most respondents get this information (78%). Two percent saw the alert via email. (See **Error! Not a valid bookmark self-reference.**)

Table 4.5-13: FYP NOW! PSA Media Channels

QE2. Where did you see or hear this notice informing you that it was a Flex Your Power NOW day?	Saw/Heard FYP NOW! PSA
Radio	78%
Television	37%
Newspaper	10%
Email	2%
Other	3%

DK/Refused	11%

The response or specific actions that respondents who have seen/heard a PSA and reported being able to reduce their usage after hearing the PSA are presented in Table 4.5-14 below. Actions include shutting off unnecessary electric equipment (57%), specifically shutting off unneeded lights (34%), or shifting usage to a different time of day (31%). Other actions mentioned are turning down the thermostat (25%), or using fans to cool the house (23%). These are all suggestions found in FYP/FYP NOW! messaging, which indicates that these respondents are listening to the marketing message. (See Table 4.5-14)

Table 4.5-14: Actions Taken After Hearing FYP NOW! PSA

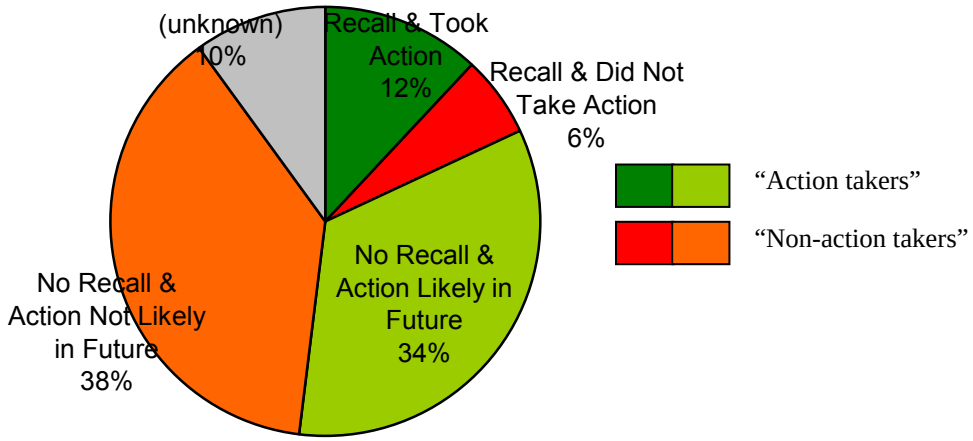
(Among respondents who said they were able to reduce electric usage after hearing PSA) QE4. What did you do [after hearing PSA]?	Actions taken After hearing FYP NOW! alert
Shut off unnecessary appliances/electric equipment	57%
Turn off unneeded lights	34%
Use major appliances in early morning or at night	31%
Turn thermostat down	25%
Use fans to cool house	23%
Conserve energy in general	21%
Pull window shades/curtains	9%
Other	1%

Next it is very important to understand what respondents, who do not recall seeing/hearing a FYP NOW! PSA, would do in the future if they were to see or hear one. Of the respondents who did not see/hear a FYP NOW! PSA or are unsure if they did, 62% are likely to change their energy use if they saw/heard a FYP NOW! PSA in the future (giving an 8, 9, or 10 rating on a scale where 1 means extremely unlikely and 10 means extremely likely).[34]

To sum up FYP NOW! PSA Recall and Response in terms of all survey respondents, 12% tried to reduce their electric use in response to an FYP NOW! alert and 34% (who did not recall in the past) self-report that they are likely to change their energy use the next time they see an FYP NOW! alert. The remaining 44% of the people who either did not take action or are not likely to take action in the future during an FYP NOW! alert will be explored in the next section of this report. (See Figure 4.5-11)

[34] Respondents who said they saw an alert were not asked what they would do in the future. Because respondents who claim to have seen the alert on TV only were removed from the group of respondents who have heard the alert after the survey, they were not asked about their likelihood to take action.

Figure 4.5-11: FYP NOW! PSA Recall, Response, and Future Response



QE1. A Flex Your Power NOW day occurs when a there is an immediate and critical need to conserve electricity. Have you ever seen or heard a public service announcement, radio announcer, television newscaster or weatherman telling you that your help was needed TODAY and it was time to "Flex Your Power NOW" ?
E3. After hearing that it was a day to Flex Your Power NOW, were you able to reduce your electric usage?
QE7. Using a scale of 1-10, where 1 is extremely unlikely and 10 is extremely likely…
In the future, if you saw a message indicating that today is a Flex Your Power NOW day, how likely would you be to change your energy use? Base = Total weighted results

4.5.17 Most Effective Media Channels

Overall, the most effective media for a FYP NOW! PSA is television (47%), followed by radio (25%), email (10%), and the newspaper (9%). While this rank order remains the same by utility, differentiating the media mix by utility may be beneficial. For example, SCE can weight slightly higher on television and lower on radio, while PG&E can weight slightly higher in newspapers. (See Table 4.5-15)

Table 4.5-15: Most Effective Media Channel for FYP NOW! PSA

QE8. Which of the following would be the most effective way to inform you of the immediate need to reduce your energy usage for that day?	Total Weighted Results	PG&E (n=403)	SCE (n=400)	SDG&E (n=400)
Television	47%	45%	51%°	43%
Radio	25%	27%	22%	28%°
Email	10%	9%	10%	11%
Newspaper	9%	11%	7%^	8%
Highway Message	4%	3%	4%	5%
Public Transportation Announcement	2%	2%	2%	1%
Phone or Cell Call	1%	--	1%	1%
Other	1%	<1%	<1%	<1%
DK/Refused	2%	2%	2%	2%

^ Indicates a statistically significant difference compared to PG&E comparison group at the 95% level.
° Indicates a statistically significant difference compared to the SDG&E comparison group at the 95% level.

4.5.18 Most Effective Messages

As Table 4.5-16 outlines below, the most effective message in getting respondents to reduce their peak usage is to make them know that making a special effort to use less electrically on a hot afternoon will help avoid rolling blackouts in their area. The marketing keys will likely be convincing customers that their individual extra effort will help their specific area.

Table 4.5-16: FYP NOW! PSA Ad Message Impact in Reducing Energy Usage

QE9/E10. Is the statement much more likely, somewhat more likely, or make no difference in causing you to reduce your energy usage during peak periods. (n=1,203)	Much More Likely	Somewhat More Likely	Makes No Difference	Less Likely
If you knew that making an extra effort to use less electricity on a hot afternoon would help avoid rolling blackouts in your area.	70%	19%	11%	1%
Saving electricity saves me money.	60%	25%	15%	1%
Conserving electricity helps save our natural resources for future generations.	53%	28%	18%	2%
If we all work together, we can make a difference.	49%	30%	20%	2%
Individuals can make a difference in reducing brownouts and blackouts associated with high electricity usage.	48%	33%	18%	1%
There are simple and easy ways for me to save electricity.	40%	35%	23%	2%

As Table 4.5-17 and Table 4.5-18 outline below, a special effort to avoid rolling blackouts message is the most effective for each utility, for past and future FYP NOW! PSA action takers and among the non-action takers group who have seen a FYP NOW! PSA in the past but did not take action. However, among the important non-action taker group who have not seen a FYP NOW! PSA in the past and do not anticipate taking action even if they did see one in the future, the saving electricity saves me money message is just as effective as the avoid rolling blackouts in your area message.

Table 4.5-17: Percentage of Respondents More Likely to Reduce Peak Energy Use, by Utility

QE9/E10. Is the statement much more likely, somewhat more likely, or make no difference in causing you to reduce your energy usage during peak periods.	Total Weighted Results	PG&E (n=403)	SCE (n=400)	SDG&E (n=400)
If you knew that making an extra effort to use less electricity on a hot afternoon would help avoid rolling blackouts in your area.	70%	71%	69%	66%
Saving electricity saves me money.	60%	58%	63%	56%
Conserving electricity helps save our natural resources for future generations.	53%	53%	53%	52%
If we all work together, we can make a difference.	49%	48%	51%	40%*
Individuals can make a difference in reducing brownouts and blackouts associated with high electricity usage.	48%	48%	49%	39%*
There are simple and easy ways for me to save electricity.	40%	40%	43%	31%*

* Indicates a statistically significant difference compared to all comparison groups at the 95% level.
° Indicates a statistically significant difference compared to the SDG&E comparison group at the 95% level.

Table 4.5-18: Percentage of Respondents More Likely to Reduce Peak Energy Use by FYP NOW! PSA Responder and Non-Responder Groups

QE9/E10. Is the statement much more likely, somewhat more likely, or make no difference in causing you to reduce your energy usage during peak periods.	Total Weighted Results)	Took Action Or Likely To Take Future Action		Did Not Take Action Or Not Likely To Take Action	
		Heard PSA – Took Action	Did Not Hear PSA – Likely Action	Heard PSA – Did Not Take Action	Did Not Hear PSA – Not Likely Action
If you knew that making an extra effort to use less electricity on a hot afternoon would help avoid rolling blackouts in your area.	70%	80%†‡	74%‡	65%	45%
Saving electricity saves me money.	60%	64%‡	63%‡	58%	45%
Conserving electricity helps save our natural resources for future generations.	53%	58%‡	57%‡	53%	38%
If we all work together, we can make a difference.	49%	53%‡	50%‡	41%	33%
Individuals can make a difference in reducing brownouts and blackouts associated with high electricity usage.	48%	60%*	50%‡	44%‡	30%
There are simple and easy ways for me to save electricity.	40%	47%‡	42%‡	41%‡	25%

* Indicates a statistically significant difference compared to all comparison groups at the 95% level.
† Indicates a statistically significant difference compared to Heard PSA-Did Not Take Action comparison group at the 95% level.
‡ Indicates a statistically significant difference compared to Did Not Hear PSA-Not Likely To Take Action comparison group at the 95% level.

4.5.19 Media Mix

Respondents favor television advertisements as a way to learn about energy conservation. Of those who watch television occasionally to frequently, 77% say they watch in the evenings. Of those who listen to the radio at least once a week, 34% say they listen throughout the day and 29% specifically mentioned the morning. The information below may be useful to the Ad Agencies in shaping their ad buys by media and day-parts. (See Table 4.5-19)

Table 4.5-19: Media Profile by Utility and FYP NOW! PSA Responder and Non-Responder Groups

	Total Weighted Results	PG&E (n=403)	SCE (n=400)	SDG&E (n=400)	Took Action Or Likely To Take Future Action		Did Not Take Action Or Not Likely To Take Action	
					Heard PSA – Took Action	Did Not Hear PSA – Likely Action	Heard PSA – Did Not Take Action	Did Not Hear PSA – Not Likely Action
Most Useful Media to Learn about Conservation								
TV Ads	38%	38%	39%°	33%	19%*	35%	35%	38%
Radio Ads	15%	14%	15%	16%	33%◇‡	14%	27%‡	13%
Bill Inserts	14%	13%	16%	16%	19%	15%	13%	15%
Newspaper Ads	11%	12%	10%	12%	7%‡	12%	9%	14%
Email	9%	9%	8%	12%	12%	11%	6%	9%
Mail	10%	9%	10%	10%	9%	10%	9%	8%
Television Viewing								
Frequently or Always (a few times a week to daily)	65%	63%	69%°	60%	69%‡	63%	59%	56%
Occasionally (once a week to a few times a month	22%	24%	19%	24%	22%	22%	25%	26%
Rarely or Never (once a month or less)	13%	12%	12%	16%	9%‡	15%	15%	18%
Radio Listening								
Frequently or Always (a few times a week to daily)	53%	52%	53%	54%	71%◇‡	51%†	65%‡	49%
Occasionally (once a week to a few times a month	22%	21%	23%	21%	15%◇	23%	26%	22%
Rarely or Never (once a month or less)	26%	28%	24%	24%	14%◇‡	26%†	9%‡	28%
Newspaper Readership								
Frequently or Always (a few times a week to daily)	45%	46%	43%	44%	48%†	47%†	32%	45%
Occasionally (once a week to a few times a month	18%	17%	19%	19%	25%	18%	28%	12%*
Rarely or Never (once a month or less)	37%	37%	38%	38%	27%‡	35%‡	40%	43%

M2/M4/M6. How often do you listen to the radio / watch television / read the newspaper?

* Indicates a statistically significant difference compared to all comparison groups at the 95% level.

^ Indicates a statistically significant difference compared to PG&E comparison group at the 95% level.

° Indicates a statistically significant difference compared to the SDG&E comparison group at the 95% level.

◇ Indicates a statistically significant difference compared to Did Not Heard PSA-Likely Action comparison group at the 95% level.

† Indicates a statistically significant difference compared to Heard PSA-Did Not Take Action comparison group at the 95% level.

‡ Indicates a statistically significant difference compared to Did Not Hear PSA-Not Likely to Take Action comparison group at the 95% level.

4.5.20 Dwelling Characteristics

As shown in Table 4.5-20, the typical utility customer lives in a single-family home (72%). Eighty-five percent say they have a washing machine in their home, and 67% have a dishwasher. SCE respondents are significantly more likely than the other IOUs to have central air conditioning, but less likely to have an electric dryer. In general, two-thirds of the respondents indicate that there is someone at home on a typical weekday afternoon. The information below may useful in shaping direct marketing efforts.

Table 4.5-20: Dwelling Characteristics by Utility and FYP NOW! PSA Responder and Non-Responder Groups

	Total Weighted Results	PG&E (n=403) ????	SCE (n=400)	SDG&E (n=400)	Took Action Or Likely To Take Future Action		Did Not Take Action Or Not Likely To Take Action	
					Heard PSA – Took Action	Did Not Hear PSA – Likely Action	Heard PSA – Did Not Take Action	Did Not Hear PSA – Not Likely Action
Residence Type								
Single Family Detached	71%	69%	74%	72%	77%	72%	77%	75%
Attached/Mobile/Other	27%	29%	24%	25%	21%	27%	23%	23%
Ownership	72%	70%	74%	71%	78%	72%	79%	70%
Appliances – % With								
Washing machine	86%	85%	87%	84%	92%◇‡	85%	91%‡	80%
Personal computer	77%	76%	78%	80%	87%◇‡	76%	84%	75%
Dishwasher	66%	67%	64%	70%	69%	65%	84%*	64%
Electric dryer	53%	59%	48%*	45%	52%	54%	64%	51%
Central A/C	51%	45%	58%*	46%	60%◇‡	46%†	63%‡	43%
Second refrigerator	27%	27%	28%	28%	31%	27%	26%	28%
Swimming pool	14%	11%	17%^	15%	18%‡	13%	15%	10%
Outside spa/hot tub	12%	11%	13%	16%^	12%	13%	14%	12%
Someone Home Weekday Afternoons	67%	69%	67%	65%	62%	70%	66%	64%

D3. What type of residence do you live in?
D1. Do you have any of the following in your home? Please indicate YES, ONLY if you pay the electricity for this appliance or feature.
D6. Approximately how old is your home or apartment?
D9. Is anyone in your household at home during a typical weekday afternoon?

* Indicates a statistically significant difference compared to all comparison groups at the 95% level.
^ Indicates a statistically significant difference compared to PG&E comparison group at the 95% level.
◇ Indicates a statistically significant difference compared to Did Not Heard PSA-Likely Action comparison group at the 95% level.
† Indicates a statistically significant difference compared to Heard PSA-Did Not Take Action comparison group at the 95% level.
‡ Indicates a statistically significant difference compared to Did Not Hear PSA-Not Likely to Take Action comparison group at the 95% level.

4.5.21 Respondent Demographics

Table 4.5-21 presents the demographics of respondents in our survey. Interestingly, men skew toward the non-responder groups while women skew more towards the responder groups. Targeting men in future advertising and alert efforts may increase peak reduction actions.

Table 4.5-21: Customer Demographics by Utility and FYP NOW! PSA Responder and Non-Responder Groups

	Total Weighted Results	PG&E (n=403) ????	SCE (n=400)	SDG&E (n=400)	Took Action Or Likely To Take Future Action		Did Not Take Action Or Not Likely To Take Action	
					Heard PSA – Took Action	Did Not Hear PSA – Likely Action	Heard PSA – Did Not Take Action	Did Not Hear PSA – Not Likely Action
Gender								
Female	62%	63%°	61%	56%	67%†‡	66%†‡	51%	47%
Male	38%	37%°	39%	44%	33%†‡	34%†‡	49%	53%
Ages In HH - % 1 or More								
17 Yrs or <	37%	35%	40%	35%	45%‡	40%	32%	33%
18 to 64	81%	80%	82%	81%	88%‡	82%‡	84%	75%
65 or Older	26%	27%	26%	24%	16%◇‡	28%	20%	31%
Education								
HS/TT or Less	28%	27%	28%	22%	24%	27%	22%	23%
Some College	22%	19%	26%^	23%	21%	19%	21%	22%
College Grad or Higher	49%	52%	44%*	52%	51%	53%	55%	52%
Ethnicity								
White	68%	73%	61%*	73%	66%	69%	72%	67%
Hispanic/Latino	14%	10%	20%*	8%	19%‡	13%	10%	11%
Asian	4%	4%	3%°	6%	6%	4%	1%	4%
Black/African American	5%	3%	6%	4%	2%†	4%	8%	6%
Other	4%	3%	4%	4%	2%	6%	4%	3%

D11. [OBSERVED] Gender:
D8. Counting yourself, how many people in your household fit into the following age groups?
D7. What is the highest level of education that you have completed so far?
D10. What is your ethnicity or race?
D4. Do you (or someone else in your household) own or rent your home or apartment?

* Indicates a statistically significant difference compared to utility comparison groups at the 95% level.
^ Indicates a statistically significant difference compared to the PG&E comparison group at the 95% level.
° Indicates a statistically significant difference compared to the SDG&E comparison group at the 95% level.
◇ Indicates a statistically significant difference compared to Did Not Heard PSA-Likely Action comparison group at the 95% level.
† Indicates a statistically significant difference compared to Heard PSA-Did Not Take Action comparison group at the 95% level.
‡ Indicates a statistically significant difference compared to Did Not Hear PSA-Not Likely to Take Action comparison group at the 95% level.

4.6 Chapter 6: e-Newswire Survey Results

4.6.1 Introduction

Prior data collection efforts in this evaluation – depth interviews and secondary research – uncovered the fact that FYP distributes an e-newsletter called e-Newswire to about 12,000 business managers, facility operators, government staff and the energy community. Furthermore, it was determined that FYP Now! funds are used to support some of the costs of this newsletter. During March /April of 2006, ODC conducted a Web-based survey geared towards these subscribers. The purpose was to understand their awareness of FYP Now!, by asking some similar questions of subscribers that were asked of residential customers in our awareness and process surveys.

Since these 12,000 business customers were not randomly chosen (they subscribed themselves to receive the newsletters), this survey effort was not intended to gauge overall awareness of FYP NOW! amongst business customers. However, since this effort is one of the largest made by the FYP campaign to target businesses in California, the survey did attempt to determine the success of this business effort, delving more into the subscribers' responsiveness to FYP NOW! alerts, what types of actions they have done as a result of the alert, and other supports that businesses might need to identify other energy-reducing or -saving actions.

Upon review of the survey results, one surprising characteristic of the survey respondents caused us to more carefully reevaluate the results of this effort. Instead of finding out how this newsletter is being used by commercial and industrial customers, our responders tended to come predominantly from the energy and government communities.

Table 4.6-1: Type of Company

Type of Entity	Total (n=129)
Local government/municipality/agency	19%
Consulting firm	5%
Private energy business	9%
Builder/architect/developer	2%
Contractor	2%
Non-profit	6%
State government/agency	8%
Entertainment	1%
Media	3%
Utility	9%
Healthcare	2%
Manufacturer/industry/services	8%
Retail	2%
Education	2%
Federal government/national lab	4%
Public relations	2%
Other/Not Applicable	15%

During our secondary research, we did not find any information identifying the entities of e-newsletter subscribers, so it was not possible to determine how our small sample reflects the overall average user. It is believed that the 129 responders greatly overestimate the share of energy-industry subscribers, likely reflecting their greater interest and use of this data resource.

Consequently, the results presented below only reflect the opinions of a small, likely biased, portion of e-newswire subscribers. It is suggested that a non-'blind'[35] survey of subscribers be conducted in the future in order to understand more about the users of this resource. It would also be useful for the implementer to maintain a database of user characteristics that included, among other items, information on articles of greatest interest (ascertained by reader click-throughs).

4.6.2 Methodology

For the web-based survey, ODC used the same list of e-mail addresses that is used by FYP to send out the e-newsletter. Each subscriber received a coded email invitation to participate in a survey related to e-Newswire. Due to the evaluation team's concerns about biasing respondents, the survey was sent out 'blind' – that is, the recipient did not know that the sender was from the FYP organization. The data from the completed survey responses, however, was sent directly to ODC.

Overall, the email invitations with customized links to the survey were sent to the 12,420 customers that had signed up to receive the e-Newswire. About 19% of those that received the email opened it and, of those that opened the email, 5.5% completed the survey for a total of 129 respondents. It should be noted that this response rate is extremely low. An email invitation to complete a survey online *without identifying information from the source* or *without an incentive to participate* tends to result in a lower response rate, as seen below.

Table 4.6-2: Survey Disposition

	Total (n=12,420)	**Opened Email (n=2,367)**
Opened email	19.1%	
Click through to survey link	1.9%	10.0%
Bounced back	4.4%	23.0%
Unsubscribed	0.3%	1.8%
Completed	1.0%	5.5%

[35] Recipients received 'blind' emailed invitations to complete the survey online so that they did not know the sender was from the FYP organization to prevent any biases. However, due to the nature of web surveys/email invitation, we recommend allowing the source of the email sender to be made known to the recipient.

4.6.3 Interest and Usefulness

Half of the respondents stated that they always read the e-Newswire, while only 9% stated that they never read it. Overall, the majority of respondents (60%) stated that they read only the headlines and click on the articles of interest. Additionally, those that always read the e-Newswire were significantly more likely to read the entire issue than those that report only reading it occasionally.

Table 4.6-3: How Respondents Read e-Newswire (multiple responses)

	Total (n=129)	Always Read (n=65)	Sometimes Read (n=53)	Never Read (n=11)
Read only the headlines and click on articles of interest	60%	54%	81%*	--
Read the majority of the 'Top News' articles	20%	22%	23%	--
Read entire issue	17%	29%*	6%	--
Read the Upcoming Events	12%	14%*	13%	--
Read the Key Resources	8%	12%	4%	--
Never read e-Newswire	9%	--	--	100%

* Indicates a statistically significant difference compared to other groups at the 95% level.

The majority of respondents that do read the e-Newswire would prefer to receive it at the current frequency of every two weeks (64%), while 23% would prefer to receive it once a month and 8% would prefer once a week. Most of the respondents that do not read the e-Newswire stated that they do not have time to read it or they have technical difficulties that prevent them from receiving or reading it or they do not recall receiving it.

Those that always read the e-Newswire are significantly more likely to be interested in reading the Top News, Policy News, Progress and Industry Case Studies, Design and Building, Key Resources, and Heard Here sections.

Table 4.6-4: Sections of Interest (multiple responses)
(of those that read e-Newswire)

Sections	Total (n=118)	Always Read (n=65)	Sometimes Read (n=53)
Headlines	81%	80%	81%
Top News	64%	74%*	51%
Ideas and Technologies	59%	65%	53%
Fast Facts	55%	57%	53%
Policy News	52%	62%*	40%
Progress and Industry Case Studies	51%	60%*	40%
Programs and Funding	51%	57%	43%
Design and Building	44%	52%*	34%
Events and Conferences	36%	43%	26%
Key Resources	28%	42%*	11%
Heard Here (Quotes)	25%	37%*	11%
None of the Above Sections	3%	3%	4%

* Indicates a statistically significant difference compared to other groups at the 95% level.

Respondents that read the e-Newswire were asked to rate, on a 10-point scale where 1 is *not at all likely* and 10 is *extremely likely*, how likely they would be to use information from various forms of media. About four out of ten (39%) respondents are likely to use information from RSS feeds.

Table 4.6-5: Likelihood of Using Information from Media
(Percent rating an 8, 9 or 10 on a 10-point scale)

Media	Total (n=118)	Always Read (n=65)	Sometimes Read (n=53)
RSS feeds	39%	42%	37%
Blog format website	13%	14%	12%
Audio podcasts	9%	10%	10%

Respondents that read the e-Newswire were asked to rate, on a similar 10-point scale about usefulness, how useful they find various types of energy related news. The Headlines, Top News, and Ideas and Technologies sections are considered the most useful. Three-fourths of respondents that read the e-Newswire find the Headlines useful and about two-thirds find Top News and Ideas and Technology useful. Those that always read the e-Newswire are significantly more likely to find energy related news in Ideas and Technology, Policy News, Progress and Industry Case Studies, Design and Building, and Heard Here useful.

Table 4.6-6: Usefulness of Various Types of Energy Related News
(percent rating an 8, 9 or 10 on a 10-point scale)

Sections	Total (n=118)	Always Read (n=65)	Sometimes Read (n=53)
Headlines	75%	79%	73%
Top News	66%	70%	62%
Ideas and Technologies	64%	73%*	52%
Programs and Funding	55%	62%	47%
Policy News	54%	63%*	41%
Fast Facts	51%	56%	47%
Design and Building	40%	49%*	31%
Progress and Industry Case Studies	39%	49%*	29%
Key Resources	35%	43%	27%
Events and Conferences	27%	27%	27%
Heard Here (Quotes)	20%	28%*	12%

* Indicates a statistically significant difference compared to other groups at the 95% level.

Some respondents suggested adding more case studies and information on renewable energy to e-Newswire to make it more useful.

4.6.4 Sharing the e-Newswire

Most of the respondents (90%) receive the e-Newswire on their business email account. The majority (68%) of those that read the e-Newswire reported sharing it with others. Most report sharing the e-Newswire with co-workers (85%) and industry peers (41%). Those that always read the e-Newswire are more likely to share it with friends.

Table 4.6-7: Sharing E-Newswire (multiple responses)
(of those that report sharing)

With whom do you share?	Total (n=80)	Always Read (n=49)	Sometimes Read (n=31)
Co-workers	85%	82%	90%
Industry Peers	41%	49%	29%
Friends	24%	31%*	13%
Relatives	11%	10%	13%

*Indicates a statistically significant difference compared to other groups at the 95% level.

About half (52%) of those that read the e-Newswire reported that they share the e-Newswire with others at least every few months. Those that always read it are more than twice as likely to share it than occasional readers.

Table 4.6-8: How Often E-Newswire Is Shared

How often do you share?	Total (n=80)	Always Read (n=49)	Sometimes Read (n=31)
Always	9%	8%	10%
Half the time	25%	35%*	10%
Every few months	52%	47%	61%
Once or twice a year	14%	10%	19%

*Indicates a statistically significant difference compared to other groups at the 95% level

About half of respondents (46%) that read the e-Newswire subscribed on a website and about a quarter (24%) of them do not remember how they initially subscribed.

Table 4.6-9: Initially Subscribe

How did you initially subscribe?	Total (n=118)	Always Read (n=65)	Sometimes Read (n=53)
On a website	46%	51%	40%
A colleague or family member signed me up	9%	8%	11%
At a seminar or energy event	8%	8%	9%
Through educational material received as mailings	4%	6%	2%
Other	8%	11%	6%
Don’t remember	24%	17%	32%

4.6.5 Energy Efficiency Knowledge

Of the respondents that have read the e-Newswire, 89% (n=105) report taking energy efficiency or conservation actions in the past year. The most common actions taken are turning off lights, raising thermostat setting for air conditioning or lowering thermostat setting for heating, shutting off unnecessary appliances and purchasing efficient lighting. Respondents that always read the e-Newswire were significantly more likely to have participated in a utility program that was featured in e-Newswire than those that read it occasionally (32% vs. 15%). Sixty percent stated that they implemented at least some of their energy efficiency actions *as a result of reading e-Newswire*.

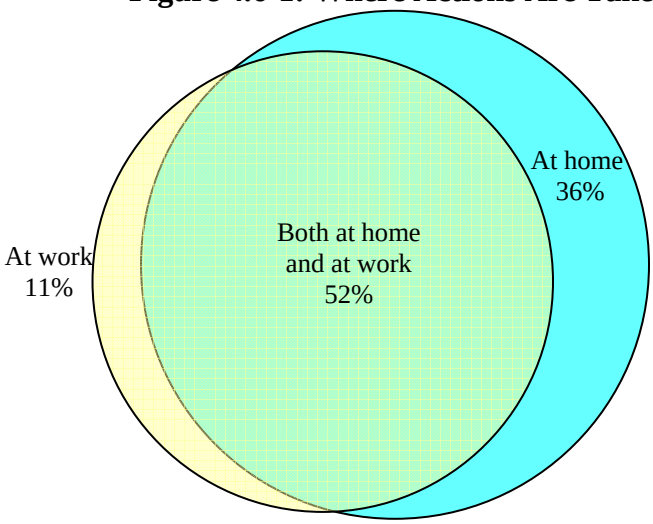
Table 4.6-10: Actions Taken (multiple responses)
(n=105, those that have taken action)

Action	Percent That Have Taken Action in Past Year	Percent That Took Action As A Result of Reading E-Newswire
Conserve energy, general	82%	35%
Turned off unneeded lights	77%	15%
Changed thermostat settings	68%	15%
Shut off unnecessary appliances	61%	16%
Invested in energy efficiency lighting upgrades	58%	17%
Contacted 3rd party about programs and services	44%	23%
Use fans to cool	33%	7%
Change usage patterns of major appliances	32%	9%
Invested in heating/cooling upgrades	29%	9%
Participated in utility program featured in e-Newswire	25%	10%
Other	2%	10%
None	-	40%

Many respondents (44%) said that they contacted a third party, such as a utility, local or state government agency or water agency about a program or service and about half of these (23%) indicated that they took the action as a result of reading e-Newswire. Those that said they participated in a utility program mentioned Home Performance with Energy Star, Savings By Design, lighting rebates, low water toilet rebates, Express Efficiency, PEC workshops and Energy Partnership East Bay.

Most of those that implemented energy efficiency actions did so at home (88%) and many implemented them at work (63%) with 52% reporting they implemented actions at both home and work.

Figure 4.6-1: Where Actions Are Taken (n=105)



Almost all (97%) respondents who read the e-Newswire, reported having an increased knowledge of energy efficiency, conservation and energy usage. A significantly higher percentage of those that always read the e-Newswire stated their knowledge increased greatly. Conversely, those that read the e-Newswire occasionally stated that their knowledge slightly improved.

Table 4.6-11: Knowledge of Energy Efficiency, Conservation and Usage

Since Receiving the E-Newswire how would you describe your knowledge of Energy Efficiency, Conservation and Usage?	Total (n=118)	Always Read (n=65)	Sometimes Read (n=53)
Improved greatly	17%	25%*	8%
Improved somewhat	44%	51%	36%
Slightly improved	36%	22%	53%*
Not at all improved	3%	3%	4%

*Indicates a statistically significant difference compared to other groups at the 95% level

4.6.6 Reasons for Signing Up

The majority of those that read the e-Newswire signed up to accomplish a specific goal. The most commonly mentioned goals were to learn more about energy efficiency (75%) and to keep abreast of energy policies (72%). Almost all (95%) of those that signed up with a specific goal in mind said that the e-Newswire is meeting their goals.

Table 4.6-12: Reason for Signing Up for E-Newswire (multiple responses)

What did you hope to accomplish by signing up?	Total (n=118)	Always Read (n=65)	Sometimes Read (n=53)
Learn more about energy efficiency	75%	83%*	64%
To keep abreast of energy policies	72%	78%	64%
Reduce energy consumption	38%	52%*	21%
Improve the environment	32%	45%*	17%
Save money on energy	25%	35%*	11%
Good corporate citizenship	24%	34%*	11%
Other	4%	2%	8%
No specific goal	4%	-	9%

*Indicates a statistically significant difference compared to other groups at the 95% level

4.6.7 Logo Recognition

Of all respondents indicating that they read the e-newswire at least occasionally, 95% indicate that they have seen the Flex Your Power Now logo.

Figure 4.6-2: Flex Your Power NOW Logo

Those that have seen the logo think it is trying to portray energy conservation and turning off unneeded lights. Respondents that always read the e-Newswire (compared to those that occasionally or never read it) are significantly more likely to think the meaning is to take action now.

Table 4.6-13: Meaning of Logo

What do you think the logo is trying to portray?	Total (n=129)	Always Read (n=65)	Sometimes Read (n=53)	Never (n=11)
Conserve energy/reduce consumption	53%	49%	55%	64%
Turn off unneeded lights	21%	26%	15%	18%
You have the power to change usage	21%	22%	23%	9%
Take action now	16%	25%*	9%	-
Raise our awareness/change behavior	9%	11%	6%	9%
Regulate demand/peak response	5%	6%	6%	-
Energy efficiency	5%	8%	4%	-
It's easy to do	4%	3%	6%	-
Help state	3%	3%	4%	-
Reduce bill/lower energy costs	3%	2%	6%	-
Smart use of energy	2%	2%	2%	9%
Affect environment	2%	2%	4%	-
No comment/Don't know/Other	21%	14%	28%	27%

*Indicates a statistically significant difference compared to other groups at the 95% level

4.6.8 Secondary Research: Review of Past e-Newswire Issues

ODC also reviewed the previous issues of e-Newswires (from September 9, 2003 to May 2, 2006), which have been distributed approximately every other week. e-Newswires cover a very broad range of topics related to energy and other resources (such as water).

We searched for terms related to the goals of the FYP NOW! campaign, such as 'FYP NOW!,' 'peak/demand/reduction' (in regards to energy), and 'demand response.' These were separate searches; thus, the five articles or links including demand response in 2006 e-Newswires does not preclude that the seven instances of peak/demand/reduction from the same articles. Often, these phrases were in the same articles.

Providing information on demand response, especially links to utilities' demand response programs, helps with the ultimate goal of reducing usage at critical peak periods.

While we did not expect to see mention of Flex Your Power NOW! in 2003 (which is prior to the FYP NOW! campaign launch), there were eight articles or links in 2005 and 10 in 2004 mentioning FYP NOW! [36]. When actual FYP NOW! events occurred, the next following newsletter usually included an article or link about the campaign, by name, although they did not necessarily mention the recent event. In the two instances where this did not happen, the events were limited to Southern California only (event dates: 9/29/05, 10/14/05).

[36] While it is beyond the scope of this study, it should be noted that as of May 2, no e-Newswires in 2006 has yet mentioned FYP NOW! despite the coming summer months

Table 4.6-14: Content Review of e-Newswires

Year	Number of Issues	Incidence of words/terms appearing in articles or links		
		FYP NOW!	Peak/Demand/Reduction (related to electricity)	Demand Response
2006	9	0	7	5
2005	26	8	43	42
2004	26	10	56	31
2003	8	0	10	1

The FYP organization also distributed a special e-Newswire edition called the Flex Your Power NOW! Bulletin on July 15, 2005, to 8,868 people, thanking them for reducing peak electricity usage the day before.

Figure 4.6-3: Special e-Newswire Flex Your Power NOW! Bulletin

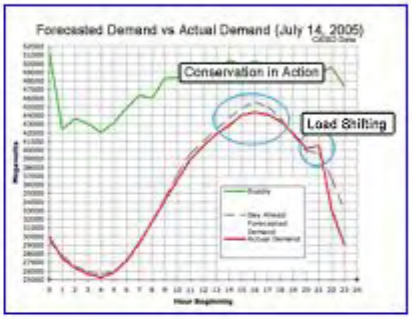
e-newswire

Flex Your Power NOW! Bulletin

www.FYPower.org | A SPECIAL E-NEWSWIRE EDITION | July 15, 2005

Thank you!

Californians, thank you for conserving energy. Your conservation efforts yesterday, Thursday July 14, helped reduce energy demand during peak hours and prevent an electrical emergency. In fact, peak electricity usage was over 2,000 megawatts less than the forecasted demand – equivalent to the capacity of 40 50-megawatt peaker plants. Energy officials attribute this success in large part to conservation.



The California Independent System Operator (Cal-ISO), the nonprofit organization that manages the state's electricity grid, declared July 14 and 15 Flex Your Power NOW! days due to hot weather statewide. Residents and businesses were asked to:

- Turn off unneeded lights, computers and appliances.
- Set air conditioner thermostats to 78° F when they're home and 85° F or off when they're away.
- Use major appliances after 7 p.m.

Conservation plays a key role in helping Cal-ISO balance the demand for energy with the available supply. In addition, conserving peak energy saves you, your business and the state money and helps protect the environment.

Sign up for day-ahead Flex Your Power NOW! email alerts

Links to related resources

San Francisco Examiner article
ABC news clip, Bay Area
ABC news clip, Los Angeles
Cal-ISO news release (PDF)

Saving Energy. It's a Way of Life. www.FYPower.org

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4.6.9 Demographics

The following information provides some additional statistics on the 129 e-newswire subscribers who completed the survey. As mentioned earlier, the responses appear bias towards energy industry market actors.

Table 4.6-15: Respondent Demographics

	Total (n=129)
Electric Company	
Pacific Gas & Electric (PG&E)	31%
Southern California Edison (SCE)	24%
San Diego Gas & Electric (SDG&E)	8%
Other	37%
Education level	
Graduate degree	37%
Some graduate school	12%
College graduate	36%
Some college	11%
Technical or trade school	2%
High school graduate	2%
Less than high school graduate	2%
Occupation	
Marketing/Advertising/Public Relations	19%
Architect/Engineer	9%
Management/Human Resources	6%
Administrative/Customer Service	6%
Business Development/Sales	5%
Media	5%
Accounting/Finance	2%
Information technology	2%
Real estate	2%
Retail	2%
Education/Teaching	1%
Medical/Health/Biotech	1%
Other	42%
Gender	
Female	43%
Male	57%

4.7 Chapter 7: Flex Your Power Web Site Review

4.7.1 Introduction

Opinion Dynamics Corporation (ODC) has reviewed the Flex Your Power Web site – ***FYPower.org*** - as another step in the process evaluation of California's Flex Your Power NOW (FYP Now!) program. We included this review as a task in the process evaluation of FYP Now! as FYP Now! budget dollars were allocated to the ***FYPower.org*** Web site. The task involved walking through the site, analyzing the number of references to FYP NOW! and demand related issues, and an assessment of web site statistics.

ODC's assessment of the Flex Your Power Web site concentrated only to areas pertaining to issues related to FYP Now! As such, we focused our review on the placement and messaging of Flex Your Power Now!'s information and messages.

We also looked at ***FYPower.org*** Web site statistics. These statistics include:

- Number of hits on the site
- Number of pages viewed per visitor to the site
- Number of click-throughs on pages devoted to demand response issues
- FYP Now! e-mail alert sign-ups credited to the site

As part of our awareness and process evaluation surveys, we also asked respondents if they have ever accessed the FYPower.org site.

It is important to note that Web sites are dynamic and as such the 2004/2005 sites were not available during our evaluation period. Consequently, we were only able to analyze the current 2006 Flex Your Power site since the advertising and marketing efforts for FYP and FYP Now! did not concentrate on funneling people to visit the Web site, the low penetration numbers that we present in this section are not surprising. A discussion point between the implementation team and the utilities could be the extent to which driving consumers to the Web site for more information would be useful.

In previous similar educational campaigns that ODC has analyzed, we have found that a Web site can provide specific and timely information that is harder to communicate in a 30-second television or radio spot. The issues here are informing customers of the Web sites existence and getting consumers to care enough to visit the site.

We provide our overall findings of our Web site review below.

4.7.2 Overview of FYPower.org Site

Appendix 5.7 shows screen shots (taken May 14, 2006) of the Flex Your Power Web site. The site directs users to articles of interest in a number of ways. First, users may click on their sector of interest:

- Residential
- Commercial
- Industrial
- Institutional
- Agricultural

These sector pages have a limited amount of information related to the topics of demand and peak. Some of the advice provided was hard to find (more than a couple click-throughs necessary) and included information such as the following*:*

> *Use off-peak power to heat water. For those who have an electric water heater, this usage contributes to the electric utility company's "peak load," or the largest amount of power demand that they have to meet on a daily basis.*
>
> *Some utilities are required to offer their customers "time of use" rates that vary according to the demand on their system. Lower rates may be charged at "off-peak" times and higher rates at "on-peak" times.*
>
> *Check with your local electric utility to find out if it offers time-of-use rates for residential customers. Some utilities even offer incentives for customers who allow their utility to install control devices that shut off electric water heaters during peak demand periods.*

Instead of the sector headers, Web site users can also use the "Hot Topics in Energy Efficiency" headers to find topic areas of interest. During our most recent Web site review, we found six headers under the Hot Topic section, two of which included references to demand response and/or FYP Now!:

- Demand Response Programs
- When You Hear Flex Your Power NOW!

4.7.3 Overall Findings:

The following are some observations and findings from ODC's review of the Flex Your Power Web site:

- The initial Baseline Awareness survey conducted by ODC at the end of 2005 showed that two percent of Californians stated they had visited the FYPower.org site.
- Between January 27, 2005 and December 31, 2005, the Web site attracted 356,300 visitors and 1,321,000 page views.[37] The 2000 census shows 11,502,870 households in California. Making an assumption that each visitor represented a California

[37] Page views represents the number of times the page was accessed, whereas visitors represents the number of unique people who visited the site.

household, 3.1% of California households could possibly have visited the site. This simplistic formula indicates that our initial survey estimate of 2% two percent is likely accurate.

- Of those who visited, only 6,520 visitors (and 7730 page views) went to the FYP Power NOW! focused pages (1.8% of all visitors)
- At the end of 2005, 384 visitors had signed up at the FYPower.org site for the FYP Now! Alerts (0.1% of visitors, or 5.9% of visitors to FYP NOW! site pages)
- Eight FYP NOW!! Alerts (one alert accounted for 3 days) were sent out to subscribers, covering 11 events.[38]

4.7.4 Overall Recommendations:

The following are overall recommendations from our review of the Flex Your Power Web site:

- The Web site appears to provide a great deal of information and education on energy efficiency. While there are pages dedicated to demand response and FYP NOW! our review shows that more information would be valuable related to relaying to customers the definition of peak and why it is important, and cost effective, to save as much energy as possible during peak hours.
- References to the FYP NOW! program need to be updated more frequently. Looking through the site in May 2006, we still saw many references to the summer of 2005. For example on the FYP NOW! page in the "Highlight" Section there is an article entitled: "*Governor, Cal-ISO, Utilities Call On Power Consumers to Conserve in Summer 2005*". This obviously needs to be updated as we move into the summer of 2006.
- Ensure that energy saving hints, strategies and program referrals are made in conjunction with the appropriate climate season. We noticed several mismatches including one example on the Residential sector pages when users were provided hints and strategies to save energy in the winter during the Month of May.
- The Web site could be made even more user friendly by providing improved accessibility to conservation related behaviors. Some of the recommendations include providing links directly to utility Web sites and more importantly to the conservation and peak programs and services offered. We also recommend that the pages that focus on FYP NOW! and demand programs have the FYP NOW! logo, rather than the FYP logo, which focuses on energy efficiency.

The following are recommendations for specific Web Site enhancements:

- The link for the FYP NOW! Page is buried under hot topics on the left side of the home page. We suggest that this link be highlighted. A good way to do this would be to have the FYP NOW! logo at the top of the site, with the ability to click on the logo and connect to the FYP NOW! page.

[38] The Flex Your Power NOW! Bulletin and e-Newswire are separate opt-in mailing lists. E-Newswire was used to urge people to sign-up for the FYP NOW!! Bulletin but they are separate lists. Unless e-Newswire subscribers opted-in to receive the FYP NOW!! Bulletin, they didn't receive it.

- The FYP NOW! page is not very user friendly and makes navigating pages and topics difficult.
- With summer almost here, it would be a good time to focus on FYP NOW! As mentioned above, the site should direct readers to the FYP NOW! page and also to the sign–up link for Flex Your Power NOW! Alerts.
- Regarding the FYP NOW Alert sign-up – it is difficult to find this link –even with two such links on the page. In fact, there is a section asking 'How Can I Help"? that does not direct readers to the sign-up page. A crawler at the top of the site - indicating something like: "Californians do your part. Click here and Sign-up for Flex Your Power Alerts" would be extremely useful.