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MEMO

Date: April 20, 2012
To: Board of Directors
From: Philipp Degens, Evaluation Manager
Kate Scott , Home Project Manager
Subject: Staff Response to Personal Energy Report October Survey Report

The Personal Energy Report (PER) appears to be a valued service as the six month survey indicates that customers receiving the PER have a favorable impression (2/3s) are reading it at about the same rate as they did 3 months before (45% cover to cover) and an increasing number are finding the information useful/valuable since the last survey (37% vs. 29%).

Energy Trust is concerned about, and trying to determine how best to address, the concerns of those surveyed customers that are not satisfied with the accuracy of the PER (15%) and report that they do not value the information (8%). Better communications on how to improve the accuracy of the report, as well as offering easier ways to discontinue the service are being considered.

Survey respondents reported energy saving actions had also increased since the last survey (44% vs. 29%), while the number planning future actions remained the same. As expected, conservation actions dominated the actions taken while equipment/measure installations dominated the projects planned for the future.

Energy Trust is also encouraged by the finding that the majority of customers valued the collaboration between Energy Trust, Northwest Natural and Portland General Electric and that the collaboration had a positive or neutral effect on their impression of their gas or electric utility.

A billing analysis performed by OPower, the PER contractor, indicates that energy savings are lower than expected for both fuels (1.7% vs. 2% electric and 0.7% vs. 1% gas). However, gas and electric savings are increasing over time and are expected to continue as the PER service has been extended for an additional year.

ENERGY TRUST OF OREGON
PERSONAL ENERGY REPORT
OCTOBER SURVEY REPORT

Prepared for:

ENERGY TRUST OF OREGON

Prepared by:

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February 10, 2011

1. EXECUTIVE SUMMARY

Energy Trust of Oregon (Energy Trust), in collaboration with NW Natural (NWN) and Portland General Electric (PGE), initiated OPOWER's Personal Energy Report (PER) on a pilot basis to 60,000 single-family households in both NWN and PGE's territories. The goal of the PER is to provide Energy Trust, NWN, and PGE customers with information about their households' electric and natural gas consumption and to offer tips on how they can conserve energy. This pilot represents the first dual fuel, multi-utility collaboration for OPOWER. As of October 31, 2011, the collaboration sent five PERs to customers. This report represents the second of three survey efforts designed to assess the value of the PER to customers and to provide process findings for the pilot. Through this study, we track changes in the last four months to customers' opinions[1] of the report and actions taken since receiving the reports. We present survey data collected in October in comparison to the data collected in June. [2]

Overall, our October survey demonstrated that the PER continues to provide value to Oregon residents and has a favorable effect on customers' perception of the report's sponsors. Below we detail the key findings from this survey effort.

- **Customers find the PER collaboration valuable and the PERs have a neutral or positive effect on customers' satisfaction with their utility.** Our survey found that almost 60% of participants find the collaboration between ETO, PGE, and NWN valuable, consistent with the findings of our June Report. Further, we found that the report had a neutral or positive effect on participants' satisfaction with its utility sponsors, with 92% of PGE and 88% of NW Natural customers reporting neutral or positive changes in their satisfaction with the utilities.
- **Customers continue to actively read the PER and share the report with others.** After nine months of exposure to the PER, customers consistently read the report, with 45% reading the report cover-to-cover (consistent with our findings in the June report (45%). Further, over a third (36%) of our October survey respondents discussed it with someone, mostly a member of their household or family. These findings are very similar to the findings presented in our June report, where 43% discussed the report with others.
- **Customers have good impressions of the PER and positive impressions may be increasing over time.** Two-thirds (65%) of participants have a good impression of the PER. The number of participants who report that the information it provides is useful or valuable has increased from 29% to 37% since our last study. In addition, we found that the number of participants who want more information has decreased from 13% to 4%, indicating that the PER program may be educating customers more effectively through repeated treatment/reports.

[1] This effort does not track changes in the same group of participants over time. We surveyed two distinct groups of participants in the June and October surveys.

[2] Energy Trust of Oregon Personal Energy Report. 3-Month Study. Final August 2011, henceforth referred to as the "June Report."

- **While the PER report is viewed favorably overall, a small but persistent group of customers have a poor impression of the report.** Eleven percent of customers interviewed in October had poor impressions of the report (consistent with our June findings (9%)). Those who have an unfavorable view of the PER most often state that "the report is not accurate." Over time the number of customers who feel that the report is inaccurate is increasing (from 8% of those with an unfavorable view from our June survey to 15% from our October survey). Thus, additional reports may not alleviate accuracy concerns for customers who doubt the validity of the data.

- **Most customers find the Neighborhood Rank Module valuable.** In our June report, we inquired about customers' impressions of various report modules included in the PER. In our October survey, customers were interviewed about a new module that was introduced to the program reports: the Neighbor Rank Module[3]. In general, participants find this module to be useful, with a mean usefulness rating of 3.6. In particular, 55% of participants who found the Neighbor Rank Module to be useful indicated that it is useful because it allows them to see where they rank, and 18%, because it taught them how to improve.

  - **When compared to previous usefulness scores of other modules, the Neighborhood Rank has a relatively high usefulness score.** Compared to the usefulness scores of other modules in the June report, the mean usefulness rating of the Neighbor Rank Module is comparable to the Historical Comparison Module rating (3.7) but higher than the Neighbor Comparison Module (3.3) and the Energy Savings Tips Module (3.1).

- **Customers continue to take action over time, with a strong focus on conservation-based actions, and plan to take measure-based actions in the future.** The number of participants who report that they have taken action to reduce their homes' energy consumption since receiving the PER has increased from 29% (in the June report) to 44% (in the October survey). Customers' most commonly reported actions in the October survey are turning off lights when not in the room (24%), unplugging appliances when not in use (22%), and turning down the thermostat (20%).

- **Customers are more likely to act if the PER provides new information.** Participants who learned something new from the PER report reported taking more actions since receiving it (45% compared to 21% of those who do not learn something new). In addition, customers who have received new information also report that they have more actions planned for the future (67% compared to 47% of those who do not learn something new). These findings are similar to those of our June report.

- **Very few customers seek out additional information as a result of the PER, however, the PER website is the most commonly cited source for additional information.** A very small percentage of customers (8%) visit the PER website. However, the PER website is the most commonly cited source by those participants who choose to seek out additional information about ways to save energy in their homes.

[3] We also asked customers about one module which was not sent to any customers and the Energy Savings Goal Module which was not sent to many customers, and therefore we could not analyze those results.

- Notably, our survey does not show an increase in customer's use of the PER website over time, as this is the same percentage that reported visiting the website in the June survey (8%).

1.1 RECOMMENDATIONS

Based on our findings from the October survey efforts, we offer the following recommendations to Energy Trust:

- **Continue to develop methods to ensure that the PER is providing customers with information that is new to them.** Results show that an important factor in influencing customers to take action is whether the report provided them with ways to save energy that they were not aware of before reading the report. Ensuring that participants are learning new information may be key to maximizing energy savings.
- **Clarify the criteria for selecting "Neighbors" in the Neighborhood Comparison Section.** A general misunderstanding of the neighborhood comparison continues to be an issue and most likely leads to skepticism of the data.
- **To the extent possible, better highlight how customers can resolve their accuracy concerns.** Because the primary criticism of the PER stems from perceptions of its accuracy, the collaboration may want to consider methods to better direct customers to the PER website to update their information (and potentially improve their comparison). This may help to resolve concerns among those that have poor impressions of the report.

ENERGY TRUST OF OREGON PERSONAL ENERGY REPORT
3-MONTH REPORT

Final

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1. EXECUTIVE SUMMARY

Energy Trust of Oregon (Energy Trust), in collaboration with NW Natural (NWN) and Portland General Electric (PGE), initiated OPOWER's Personal Energy Report (PER) on a pilot basis to 60,000 single family households in both NWN and PGE's territories in the Portland Metropolitan Area. The goal of the PER is to provide Energy Trust, NWN, and PGE customers with information about their household's electric and natural gas consumption and to offer tips on how they can conserve energy. This pilot represents the first dual fuel, multi-utility collaboration for OPOWER. As of June 1, 2011, the collaboration has sent two PERs to customers. This report represents the first of three studies conducted to assess the value of the PER to customers and to provide process findings for the pilot. Our findings may be summarized into two primary categories: (1) customer feedback; and (2) pilot coordination and implementation.

1.1 Customer Feedback

As of this report, The OPOWER pilot and collaboration has successfully launched its second report and customers view the collaboration favorably. The majority (63%) of customers feel that the collaboration between Energy Trust, NW Natural, and PGE is valuable, and nearly half of customers (45%) are reading the report from cover to cover. In addition, 43% of customers have discussed the report with others, most commonly members of their household.

Overall, two-thirds of customers have a favorable impression of the report (mean of 3.3 on a 1-5 scale, 1 being "poor" and 5 being "excellent"), and two-thirds (66%) of customers are satisfied with the overall level of detail in the report. Of all sections of the report, the Historical Comparison section received the highest mean usefulness score (mean of 3.7 on a 1-5 scale, 1 being "not useful" and 5 being "useful"), followed by the Neighborhood Comparison Section (3.3). The Energy Saving tips received the lowest usefulness ratings (3.1).

Just over three-quarters of respondents (78%) said they understood their household's energy consumption better after reading the report; however, only 38% said they learned new ways to save energy from the report. This is noteworthy, as our data indicates that customers who learned new ways to save were more likely to take action after receiving the report (45%, compared to 21% for those who did not learn new ways to save) and more likely to have plans to take action in the future (67%, compared to 47% for those who did not learn new ways to save). For this reason, the educational content of the report is an important part of moving customers to energy saving action. We found that the customers who *did not take action* in the year prior to receiving the report were not significantly more likely to have taken action since receiving the report, or to have plans to take action in the future.

Over 60% of customers had taken action to reduce their energy consumption in the year prior to receiving the energy report. Since receiving the first two reports, 30% of customers have taken action and 57% of customers have plans to take action in the future. Most of the actions that customers took since receiving the report have been conservation behaviors

and most of the actions that customers are planning to take in the future are efficiency-measure based actions.

1.2 Pilot Coordination and Implementation

Energy Trust's PER is the first OPOWER-implemented program to incorporate three organizations into the launch of a single report. This collaboration offered the unique advantage of using customer billing information from two utilities while also providing energy savings tips from Energy Trust. However, the partnership required greater planning and coordination in advance of the program launch than was anticipated. As a result, the initial launch was delayed from the original 2010 launch to January 2011. The primary reasons for the delay were: (1) the extended contract development process due to legal concerns about customer data sharing procedures and (2) increased coordination and review due to the number of collaborating organizations. These issues were resolved in time for the 2011 launch, but affected savings estimates and budgets for the 2010 portfolio. In addition, due to data transfer errors in customer data for the first report, roughly 100 customers received the wrong usage information on their report. This issue was quickly resolved, and the contaminated customers were dropped from the study. After the initial design and launch, the pilot implementation has been successful.

1.3 Recommendations

Based on the results of the 3-month survey, the evaluation team has the following recommendations to improve the OPOWER Pilot.

1.3.1 PER Design and Customer Engagement

Overall, customers are satisfied with the PER. To enhance the report, we recommend the following:

- **Continue to develop methods to ensure that the PER is providing customers with information that is customized and new to them.** The survey results indicate that ensuring that customers are learning new information may be key to maximizing energy savings. To do this, we recommend the following:
    - **More actively promote the website and clearly indicate that it can provide new and customized information.** Currently, few customers use this feature; however, it is the primary tool that customers can use to customize the program. Through the website, customers are able to enter household-specific data and receive customized tips. In this respect, the website offers a unique opportunity for customers to seek out new information. For this reason, the program should more actively call out and promote this feature.
    - **Develop additional ways to provide customers with more detailed household information on the PER.** Customers expressed an interest in viewing and accounting for changes to their household, including changes in occupancy or year-to-year differences in weather patterns in the historical comparison

graphs. If possible, the pilot should consider ways to provide more detail and explanatory information in the PER itself.

- **Clarify the criteria for selecting "Neighbors" in the Neighborhood Comparison Section.** Although the report defines the term "Neighborhood," many customers misunderstood the definition, leading to skepticism of the data. To reduce these concerns, the pilot should consider ways to clarify this term.

1.3.2 Coordination and Implementation

As noted earlier, the primary challenges in the PER launch resulted from unanticipated complications in coordinating multiple organizations and most of the issues encountered through the pilot planning and implementation process have now been resolved. The resolution occurred through new management at OPOWER and lessons learned in the collaboration process. To maintain and enhance ease of coordination and implementation if the pilot is expanded to additional regions, we offer the following recommendations.

- **Energy Trust and collaborating utilities should lengthen the timeline for program launch when incorporating new organizations.** The initial program launch timeline was unrealistic given the legal and data sharing negotiations and agreements inherent in collaboration. Looking forward, the program should use the pilot launch period as a point of reference for future roll out, and anticipate similar challenges if the program is expanded to other regions served by Energy Trust.
- **Provide greater lead-time for document review due to the extensive collaboration in decision-making.** OPOWER should account for the time needed to fully integrate the utilities and their respective decision-makers into the planning and review process.
- **Energy Trust and the collaborating utilities should consider developing methods for random checks on data integrity.** Given some of the issues faced in the launch of the pilot, such as providing the wrong billing data to customers, a process for conducting random checks of report data accuracy should be developed.