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# 2023 FLEX ALERT MARKETING EVALUATION

Summary of Survey Results (Waves 1 – 6)

CALMAC ID: CPU0350.20

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**FLEX  
ALERT**

January 9, 2023

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# Background

- A Flex Alert is a call to consumers to voluntarily cut back on and shift electricity use to off-peak hours (i.e., before 4:00 p.m. or after 9:00 p.m.).
  - In the summer of 2021, the CPUC charged DDB, the campaign implementer, with developing a media campaign to educate consumers about Flex Alerts and associated energy saving actions.
  - The Flex Alert campaign was needed to increase grid reliability and reduce potential power outages on hot summer days, like those experienced in August 2020.
- The Power Saver Rewards program allows enrolled IOU customers to earn bill credits when they decrease their energy use during a Flex Alert.
  - In the summer of 2022, the CPUC expanded the Flex Alert campaign to include the Power Saver Rewards (PSR) program.
  - Customers who are enrolled or defaulted into the Power Saver Rewards program can earn bill credits for decreasing their energy use when a Flex Alert or other emergency alerts are called.
  - The CPUC increased the proportion of funding dedicated to the Power Saver Rewards campaign in 2023 to help increase customer awareness and understanding of how Power Saver Rewards functions in relations to Flex Alerts.
- Opinion Dynamics is evaluating the performance of the Flex Alert campaign (including Power Saver Rewards) in meeting its stated objectives and program performance metrics.
- This was the first year of the campaign that no Flex Alert events were called.

# Campaign Objectives, Key Metrics, and Measurement Approaches

Metric	Measurement Approach
<b>AWARENESS</b>	
Objective: Increase Flex Alert and Power Saver Rewards brand awareness	
Unaided Awareness	% of Californians who are aware of Flex Alerts Unaided % of Californians who are aware of Power Saver Rewards Unaided
Aided Awareness	% of Californians who are aware of Flex Alerts Aided (% of Californians who have heard of the Flex Alert name) % of Californians who are aware of Power Saver Rewards Aided (% of Californians who have heard of the Power Saver Rewards name)
	% of Californians who are aware that a Flex Alert has been called after alert
	% of Californians who are aware of the actions they can take to save energy during Flex Alerts
<b>UNDERSTANDING</b>	
Objective: Increase understanding of the reason behind the need to take action during Flex Alerts	
Flex Alert/Power Saver Rewards Familiarity	% of Californians who correctly match the Flex Alerts campaign name with the campaign's message % of Californians who correctly match the Power Saver Rewards campaign name with the campaign's message
Understanding of the Connections Between Grid Conditions and Flex Alerts	% of Californians who identify the correct purpose of Flex Alerts % of Californians who identify the correct purpose of Power Saver Rewards % of Californians who correctly answer a series of True/False statements that make connections between heatwaves, electricity supply, and power outages
<b>INTENT TO ACT AND BEHAVIOR CHANGE</b>	
Objective: Increase intent to sign up for Power Saver Rewards (when not already enrolled) and to take action during a Flex Alert	
Likelihood to Take Action During a Flex Alert	% of Californians who are extremely likely to take the specified actions featured in the campaign to reduce their electricity use during times of high demand (Flex Alert event)
	% of Californians who would be likely to take the specified Flex Alert actions featured in the campaign (we would assess this for respondents that are signed up for Flex Alert and respondents overall)
Likelihood to Sign Up	% of Californians who have signed up/intend to sign up for the Power Saver Rewards program with their IOU
Action	% of Californians who took one or more of the specified Flex Alert actions featured in the campaign when an event was called

# Survey Methodology

- Opinion Dynamics conducted six waves of a bilingual online survey of Californians with a sample drawn from YouGov's non-probability opt-in panel.
  - All waves include responses from approximately 500 Californians.
- Results are weighted to be representative of the State of California's population based on gender, age, race, home-ownership, education, whether the respondent is Spanish-speaking, and income using propensity score matching and post-stratification.
- Respondents could complete the survey in either English or Spanish, with the majority choosing English.
  - **English: 2,532** (85%)
  - **Spanish: 461** (15%)
- The six waves of the tracking survey were fielded from May through October 2023.



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## EVALUATION SUMMARY



# 2023 Campaign Outcomes

Objective	Metric	Result	Change
<b>AWARENESS</b> Increase Flex Alert and Power Saver Rewards brand awareness	Flex Alert and Power Saver Rewards Unaided Awareness	% of Californians aware of Flex Alert (without prompting): 8% to 7%	Constant
		% of Californians aware of Power Saver Rewards (without prompting): <1% to 1%	Constant
	Flex Alert and Power Saver Rewards Aided Awareness	% of Californians aware of Flex Alert (prompting): 56% (baseline: May) to 64% (campaign high: July) to 58% (end of campaign: October)	Varied
		% of Californians aware of Power Saver Rewards (prompting): 25% to 28%	Constant
		% of Californians who are aware a Flex Alert that has been called after alert	N/A
% of Californians who are aware of the actions they can take to save energy during Flex Alerts varied depending on the action	Varied		
<b>UNDERSTANDING</b> Increase understanding of the reason behind the need to act during Flex Alerts and what actions to take	Flex Alert/Power Saver Familiarity	% of Californians who correctly match the Flex Alerts campaign name with the campaign's message: 47% (baseline: May) to 54% (campaign high: July) to 46% (end of campaign: October)	Varied
		% of Californians who correctly match the Power Saver Rewards campaign name with the campaign's message: 54% to 53%	Constant
	Understanding of the connection between grid conditions and Flex Alerts	% of Californians who identify the correct purpose of Flex Alerts: 36% to 34%	Constant
		% of Californians who identify the correct purpose of Power Saver Rewards: 40% (baseline: May) to 50% (campaign high: July) to 45% (end of campaign: October)	Varied
		% of Californians who demonstrated understanding of the connections between grid conditions and Flex Alerts	Varied
<b>INTENT TO ACT AND BEHAVIOR CHANGE</b> Increase intent to sign up for Power Saver Rewards and take action during a Flex Alert	Likelihood to reduce usage during a Flex Alert	% of Californians likely to take specific actions to reduce their energy usage during a Flex Alert varied depending upon the action	Varied
	Likelihood to sign up for Power Saver Rewards	% of Californians who are "extremely likely" to enroll in the Power Saver Rewards program: 21% to 23%	Constant
	Action	% of Californians who took one or more of the specified actions during Flex Alert event(s)	N/A





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## KEY FINDINGS





# Summary of Key Findings

Likelihood to take action increased for 5 of the 8 campaign promoted actions.

Action	Measurement
Chores	<ul style="list-style-type: none"><li>Do dishes or laundry before 4pm or after 9pm increased by 10 percentage points (52% to 62%).</li></ul>
Pre-cooling	<ul style="list-style-type: none"><li>Pre-cool your home increased by 7 percentage points (45% to 52%).</li><li>Run your AC cooler before 4pm increased by 7 percentage points (37% to 44%).</li></ul>
Unplugging	<ul style="list-style-type: none"><li>Unplug unused items between 4pm and 9pm increased by 7 percentage points (44% to 51%).</li></ul>
Turning off	<ul style="list-style-type: none"><li>Turn off all unnecessary lights increased by 6 percentage points (63% to 69%).</li></ul>
Charging	<ul style="list-style-type: none"><li>Charge electronic devices before 4pm or after 9pm increased by 5 percentage points (53% to 58%).</li></ul>

# Summary of Key Findings

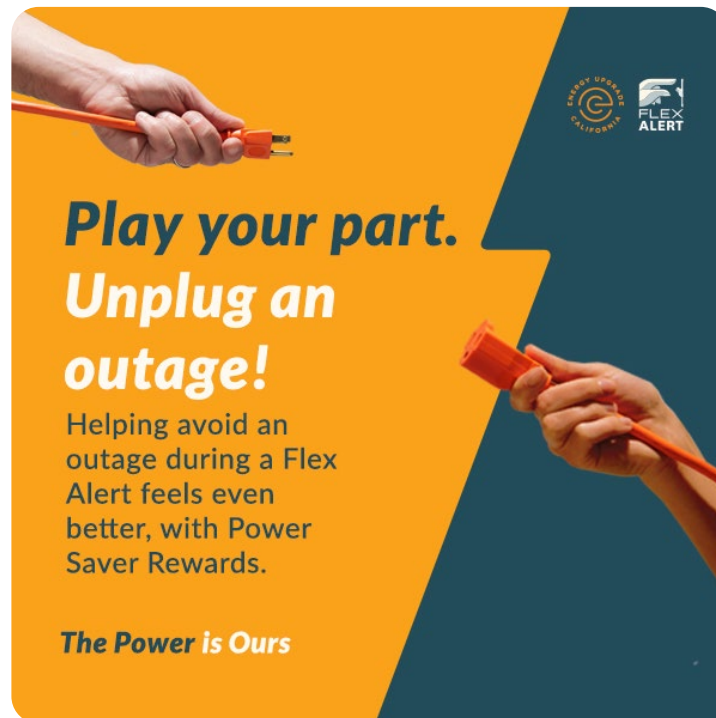
With no Flex Alerts called during the 2023 campaign period, we did not see as many meaningful changes across metrics as we did in 2022.

- Although we did not see the same level of increases across key metrics compared to 2022, we observed minor, but similar trends across many metrics (i.e., increasing throughout summer months and dropping off in latter part of campaign).
- These trends suggest a combination of awareness messaging and event day messaging have the biggest impact on Californians. Awareness messaging helps lay the foundation for “crisis” event day messaging and prepares customers to take action when a Flex Alert is called.
  - No event day messaging was implemented given CAISO did not call any Flex Alerts during the 2023 season.



# Recommendations

Continue building awareness around Flex Alert and Power Saver Rewards to further prepare Californians in the case that a Flex Alert event(s) is called in 2024.





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## DETAILED FINDINGS





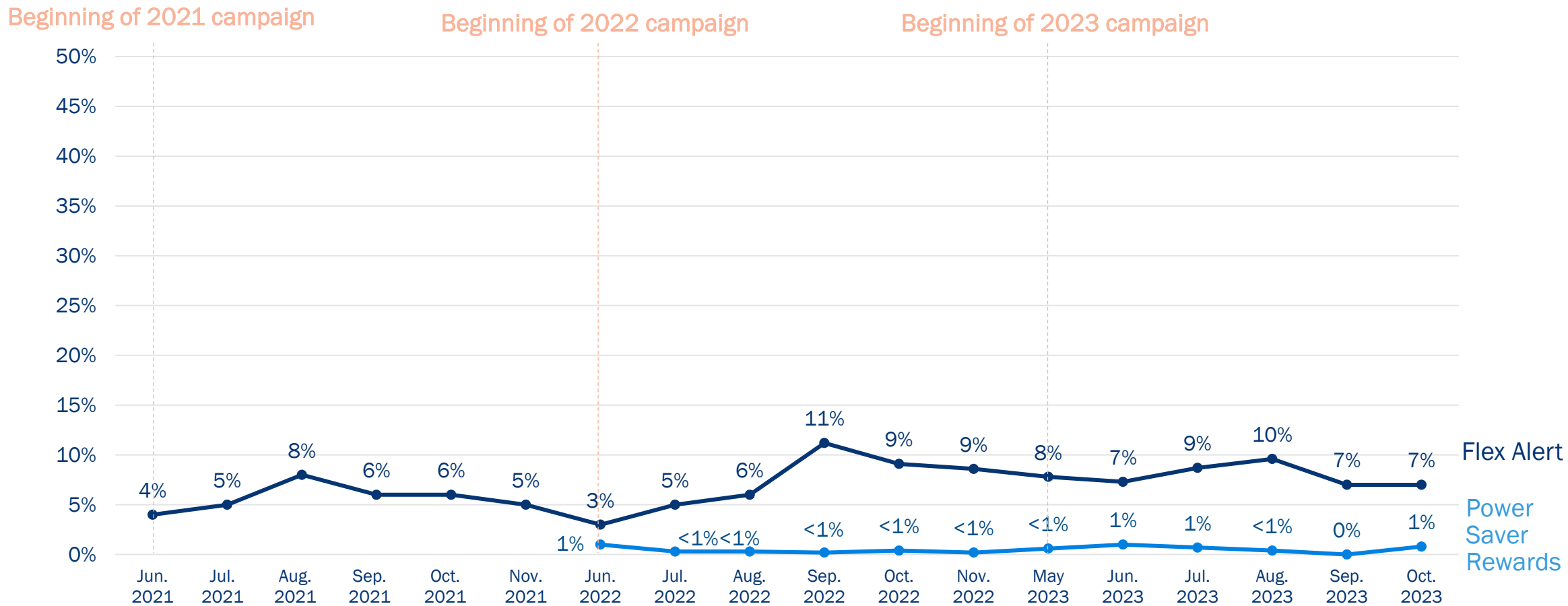
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# FLEX ALERT & POWER SAVER REWARDS AWARENESS

# Californians' unaided awareness of Flex Alerts remained fairly consistent over the campaign period, peaking in August; although unaided awareness of PSRs has remained low since we began measuring in June 2022.

When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind? (open-ended)

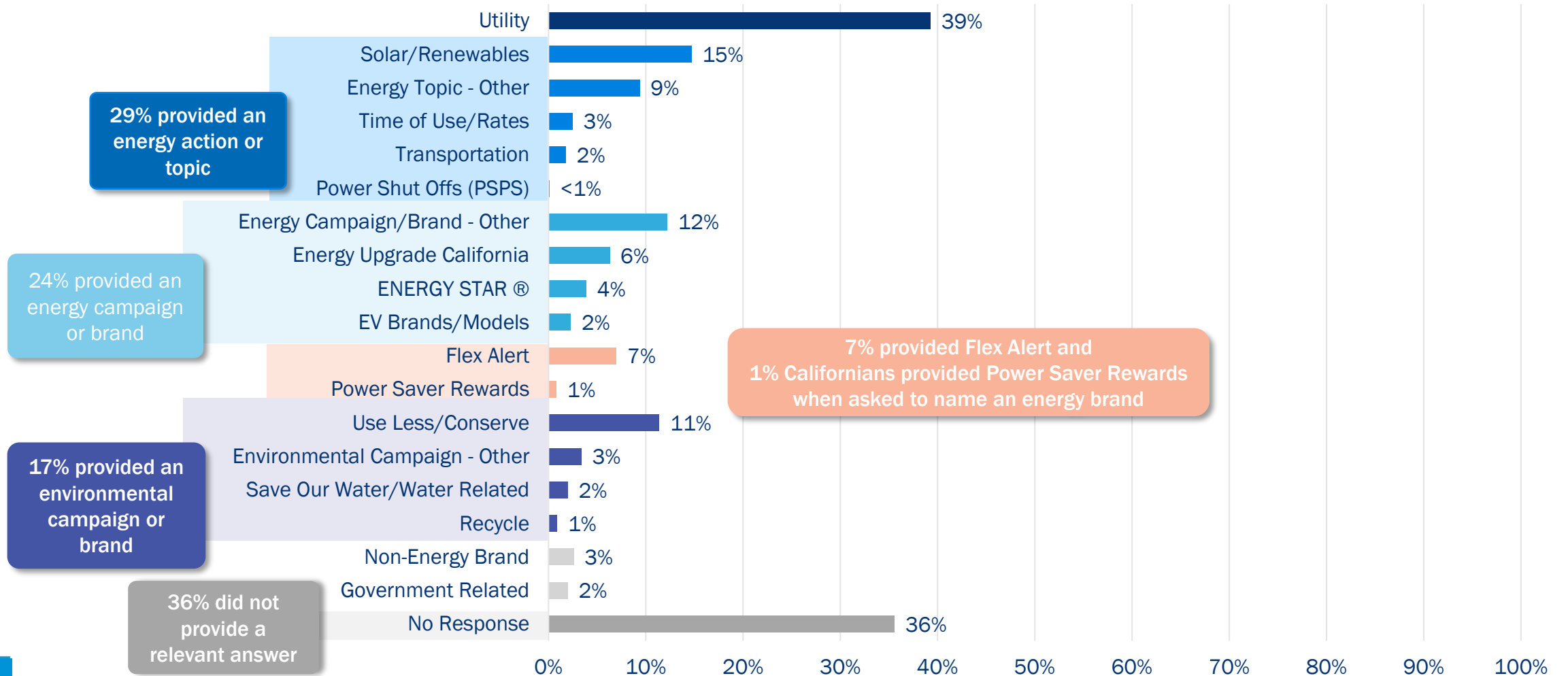


Percentage of participants who indicated Flex Alerts and Power Savers unaided

Note: Unaided awareness ranged from 2% to 5% between January and May 2021, prior to the start of the 2021 campaign.

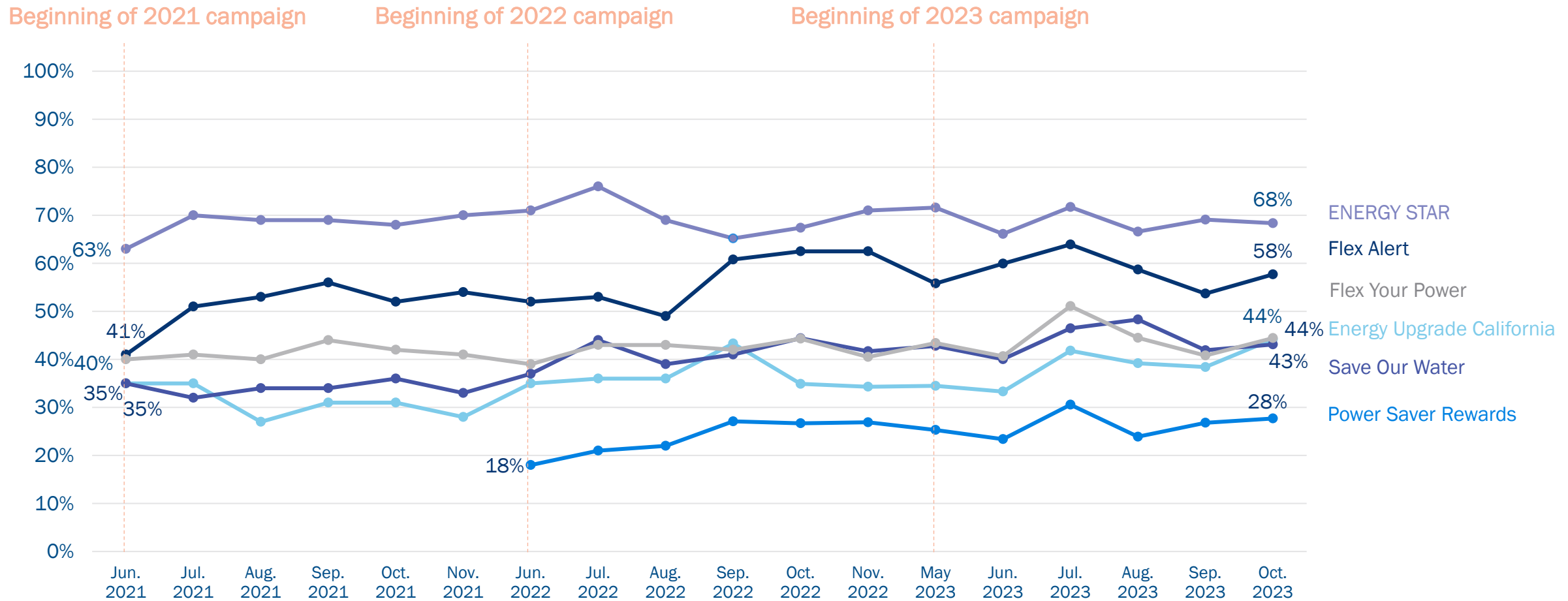
# Californians' unaided awareness of Flex Alerts has remained above that of other identified energy brands since July 2022.

When you think of brands, campaigns, or initiatives that encourage Californians to save energy, which ones come to mind? (Multiple open-ended responses allowed)



# Californians' aided awareness of both Flex Alerts and PSRs fluctuated throughout the campaign period, both peaking in July before returning to levels similar to those observed at baseline.

For each one, please tell us if you have heard of it before today.





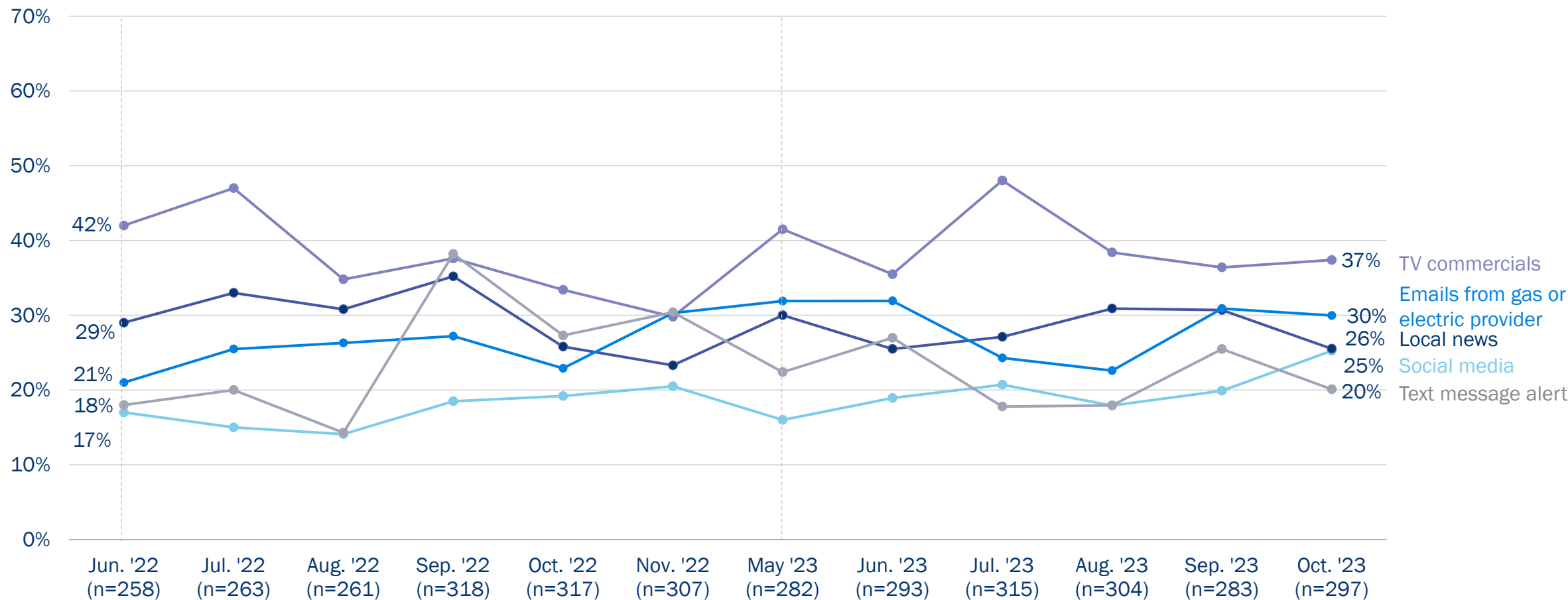
# On average, Californians most commonly heard about Flex Alerts through TV commercials, emails from their gas or electric provider, and local news coverage.

Where have you heard about Flex Alerts?

Percentage Recall Among Respondents Who Were Aware of Flex Alerts

Beginning of 2022 campaign

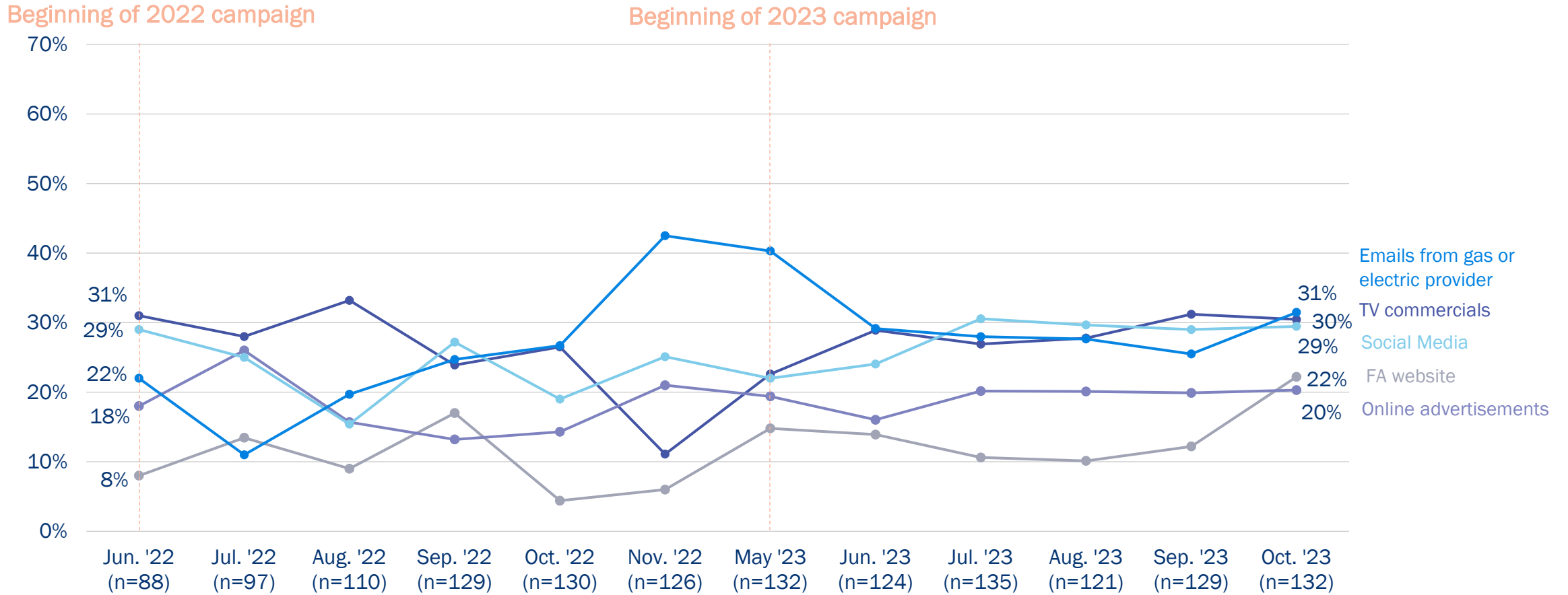
Beginning of 2023 campaign



# Common ways Californians heard about Power Saver Rewards varied throughout the campaign, although emails from their gas utility and social media were consistently the top two modes.

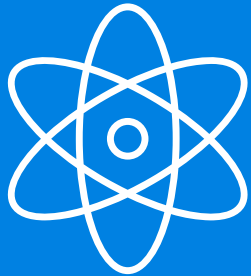
Where did you hear about Power Saver Rewards?

Percentage Recall Among Respondents Who Were Aware of Power Saver Rewards





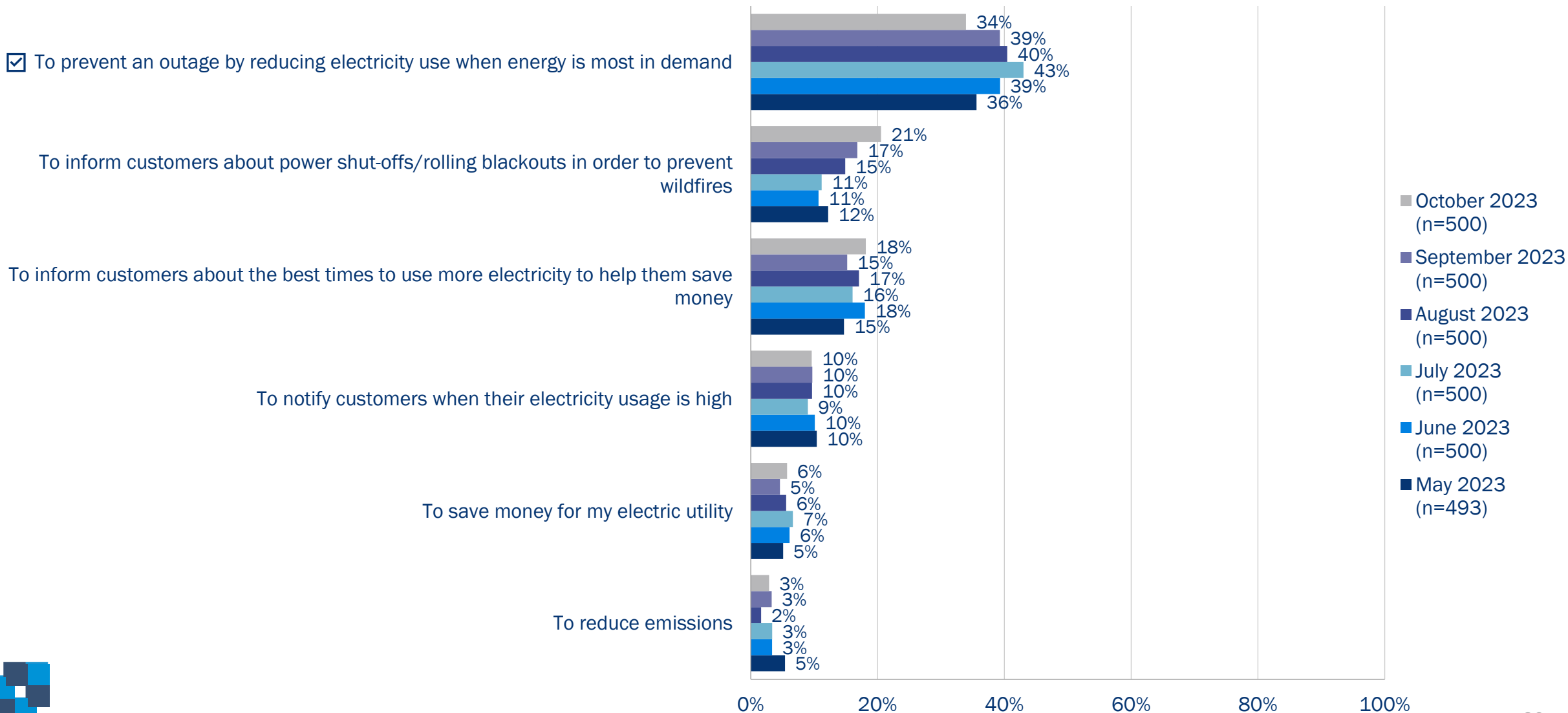
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# FLEX ALERT UNDERSTANDING

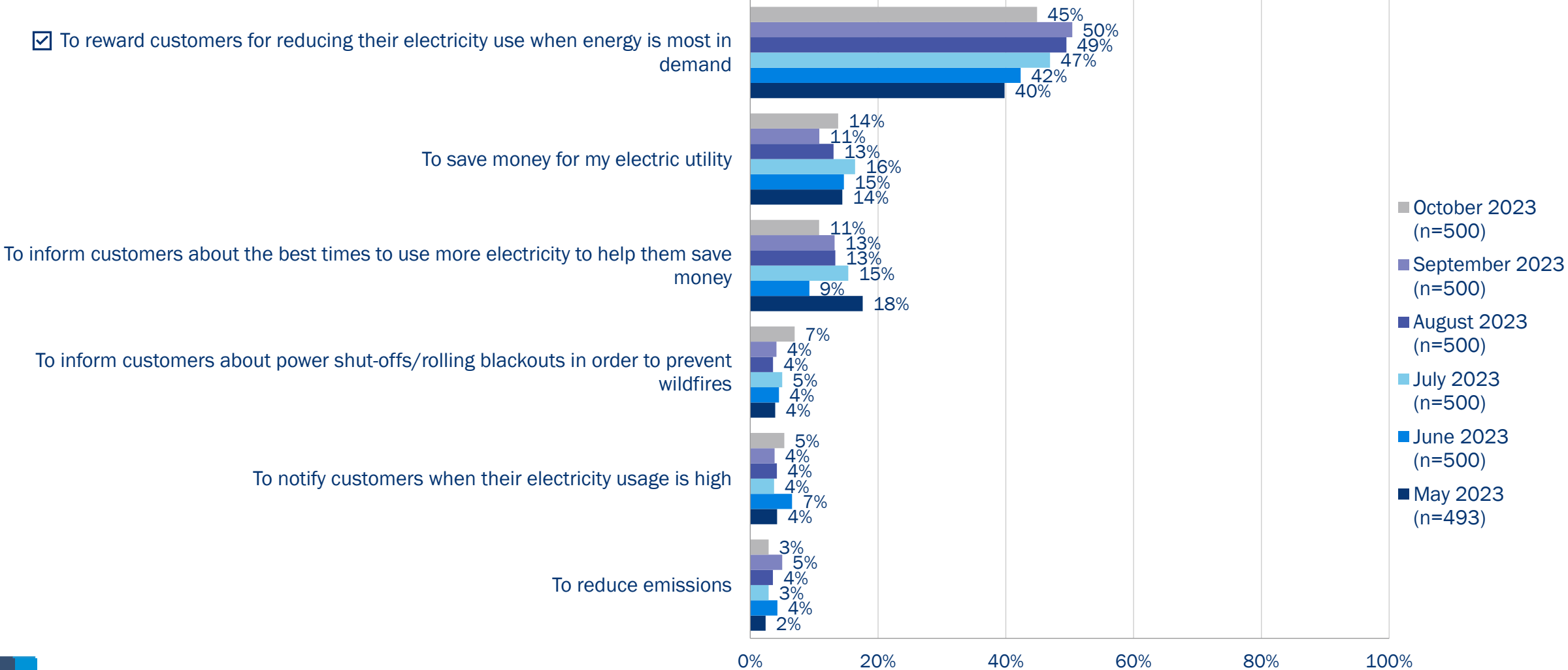
# More than one-third of Californians were able to accurately select the purpose of Flex Alerts consistently over the campaign period.

What is the purpose of Flex Alerts?



# The percentage of Californians able to accurately select the purpose of Power Saver Rewards consistently increased throughout the first 5 months of the campaign before decreasing in October.

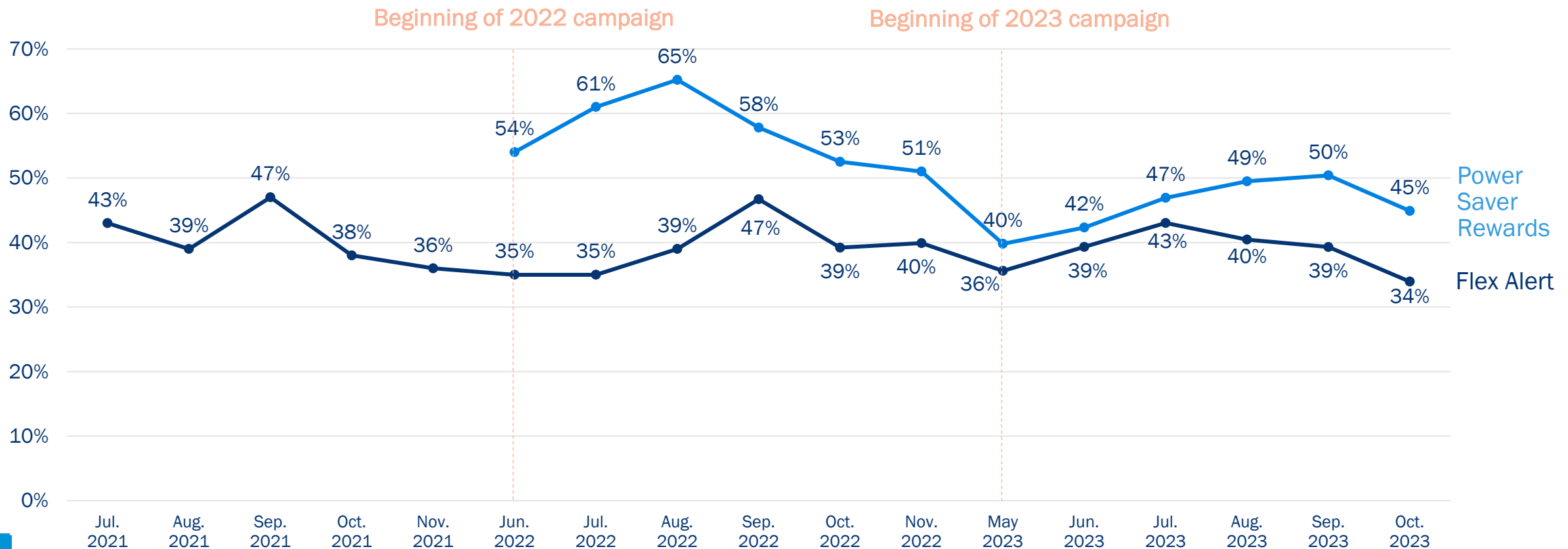
What is the purpose of Power Saver Rewards?



Californians' ability to accurately select the purpose of Flex Alerts mostly remained within the historically normal range, following a similar trend as observed in 2022; PSRs increased over most of the campaign but remained consistently below the range observed in 2022.

What is the purpose of [Flex Alerts/Power Saver Rewards]?

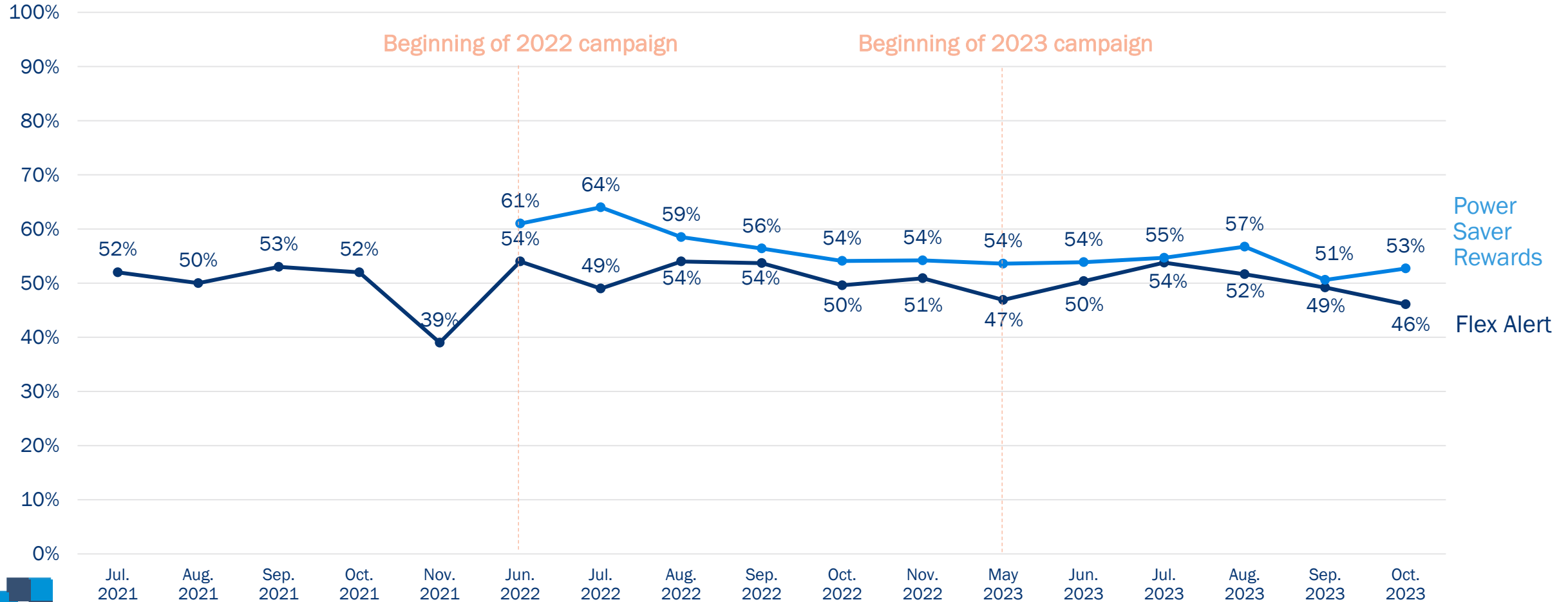
Percentage of Participants Who Correctly Selected the Purpose of Flex Alerts and Power Saver Rewards



# Californians' ability to associate the campaign name and message for Flex Alerts peaked in July before steadily decreasing back to baseline levels, while Power Saver Rewards stayed mostly consistent throughout the campaign period.

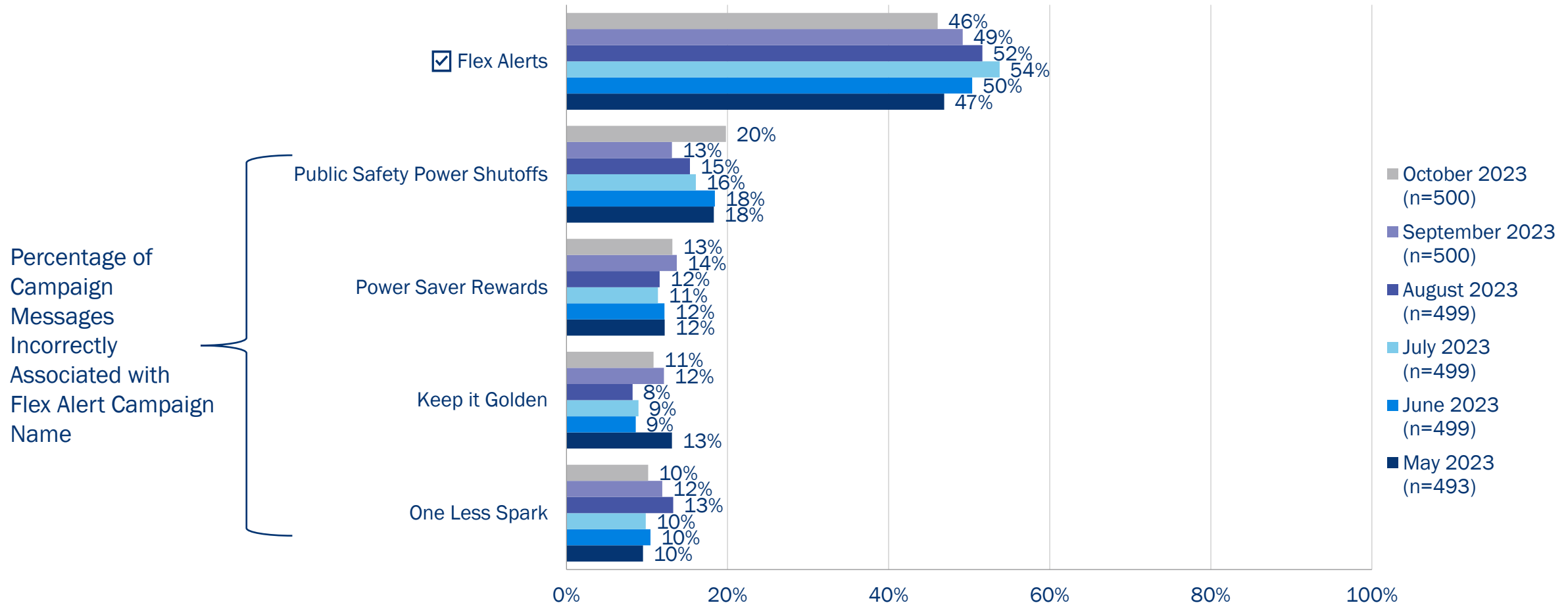
Please match each campaign with its campaign message.

Percentage of Participants Who Correctly Associated the Flex Alert Campaign Message with the Name



# The proportion of Californians who confused the Flex Alert campaign name with PSPS decreased throughout the campaign until October when levels returned to those observed at baseline.

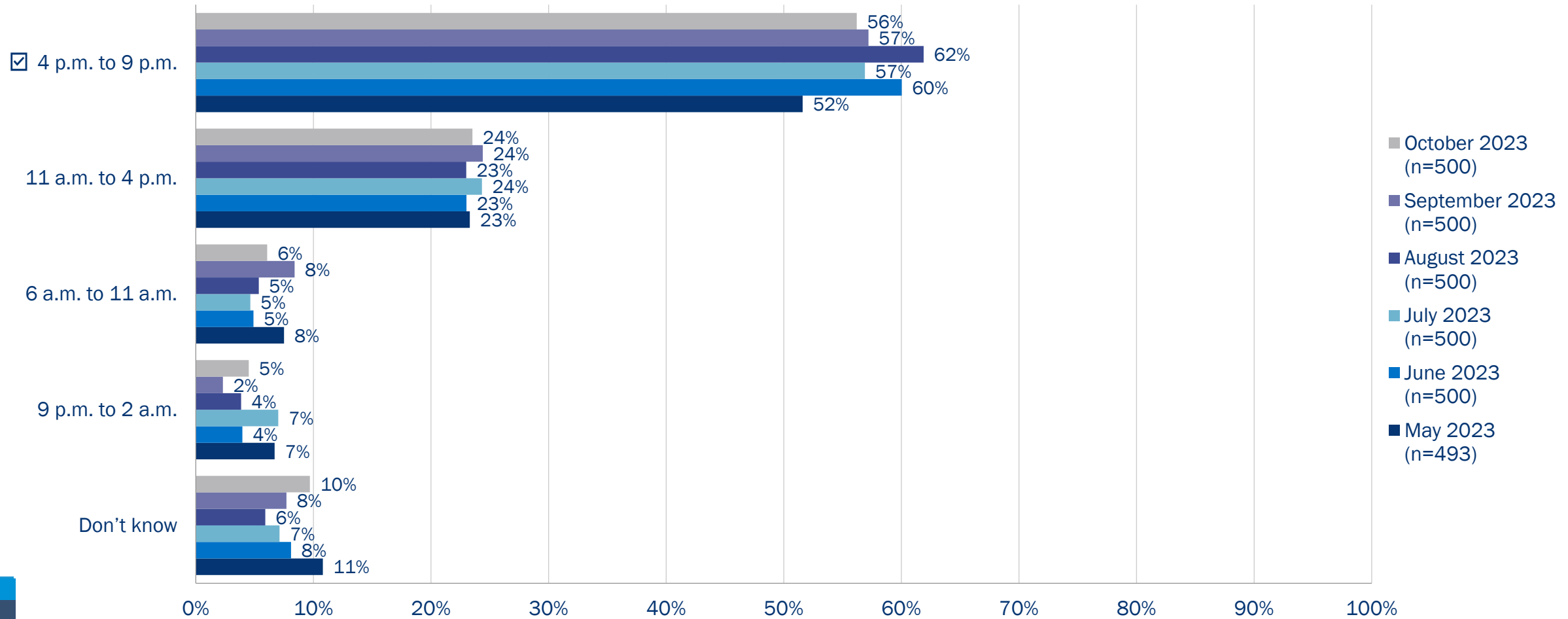
Please match each campaign with its campaign message.





The proportion of Californians able to identify the correct time period to conserve energy during a Flex Alert (4:00 p.m.–9:00 p.m.) fluctuated throughout the campaign period, although consistently remained above baseline since June.

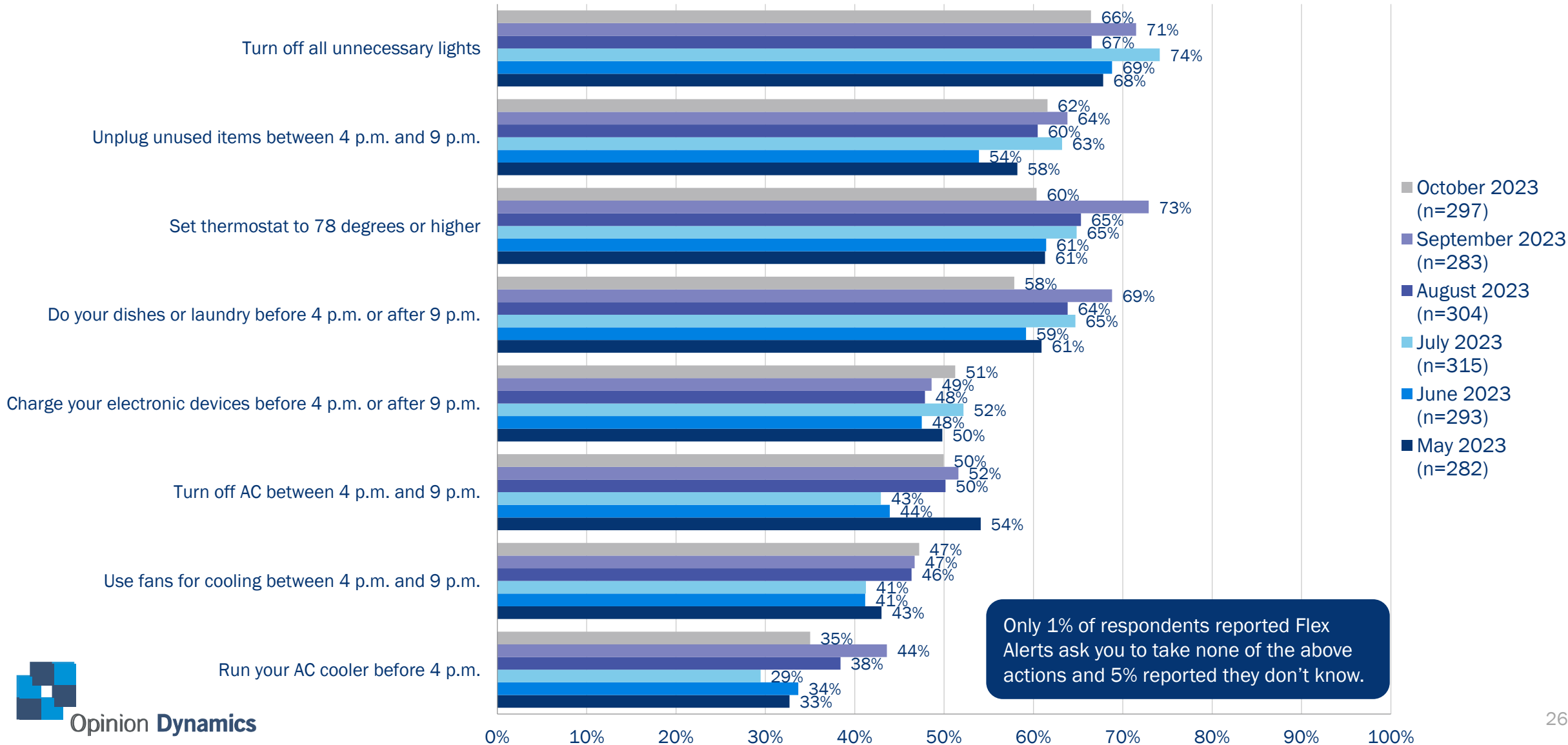
When a Flex Alert is called, during what time period is it most important for Californians to conserve electricity?



# Awareness of promoted actions generally peaked among those aware of Flex Alerts in September, while the same four actions were consistently most frequently identified throughout the campaign.

Please select all the actions that Flex Alerts ask you to take.

Percentage Recall Among Respondents Who Were Aware of Flex Alerts

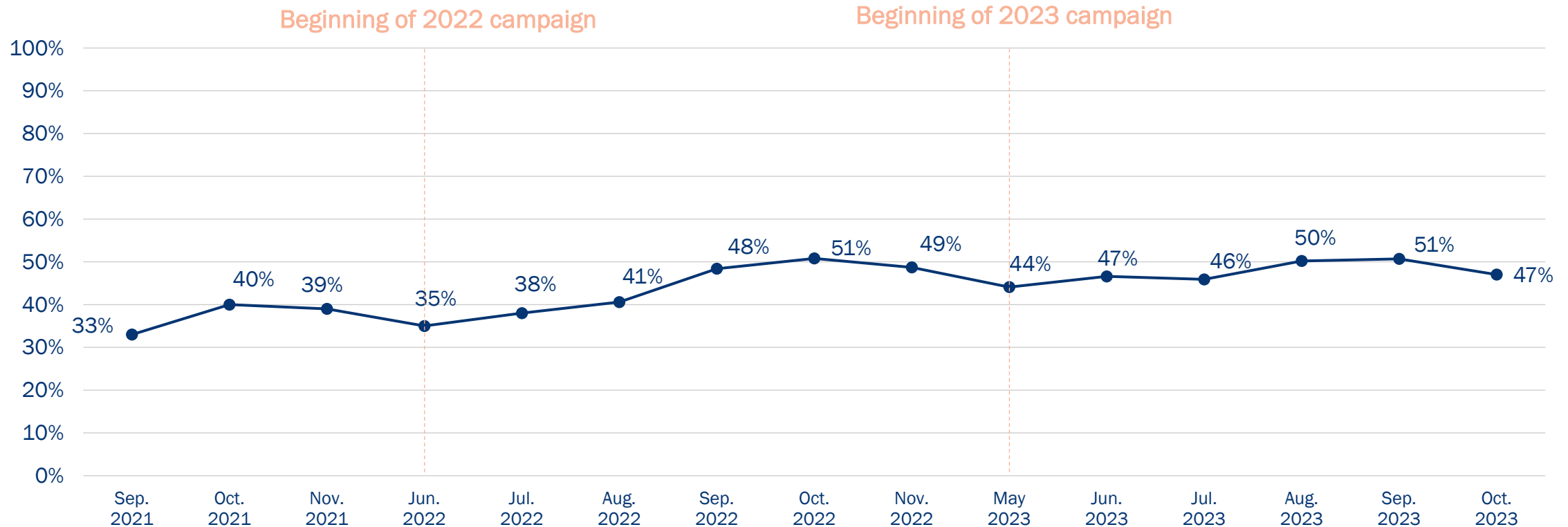


Only 1% of respondents reported Flex Alerts ask you to take none of the above actions and 5% reported they don't know.

The percentage of Californians who are aware of pre-cooling remained fairly consistent throughout the campaign period, although there has been a notable increase year over year.

Before today, had you heard of pre-cooling?

Percentage of Respondents Who Had Heard of Pre-Cooling



Note: Although the results are based on the entire sample, only those who were not aware of pre-cooling as a Flex Alert action were asked this question. It was assumed that if someone selected pre-cooling as a Flex Alert action, then they were aware of pre-cooling and were added to the yes category. Data for 2022 and 2023 were updated in Wave 5 of 2023 due to previous miscalculation of pre-cooling awareness and/or slight rounding errors.

# The percentage of Californians who correctly selected that pre-cooling uses more clean energy compared to regular cooling remained consistent over the campaign period.

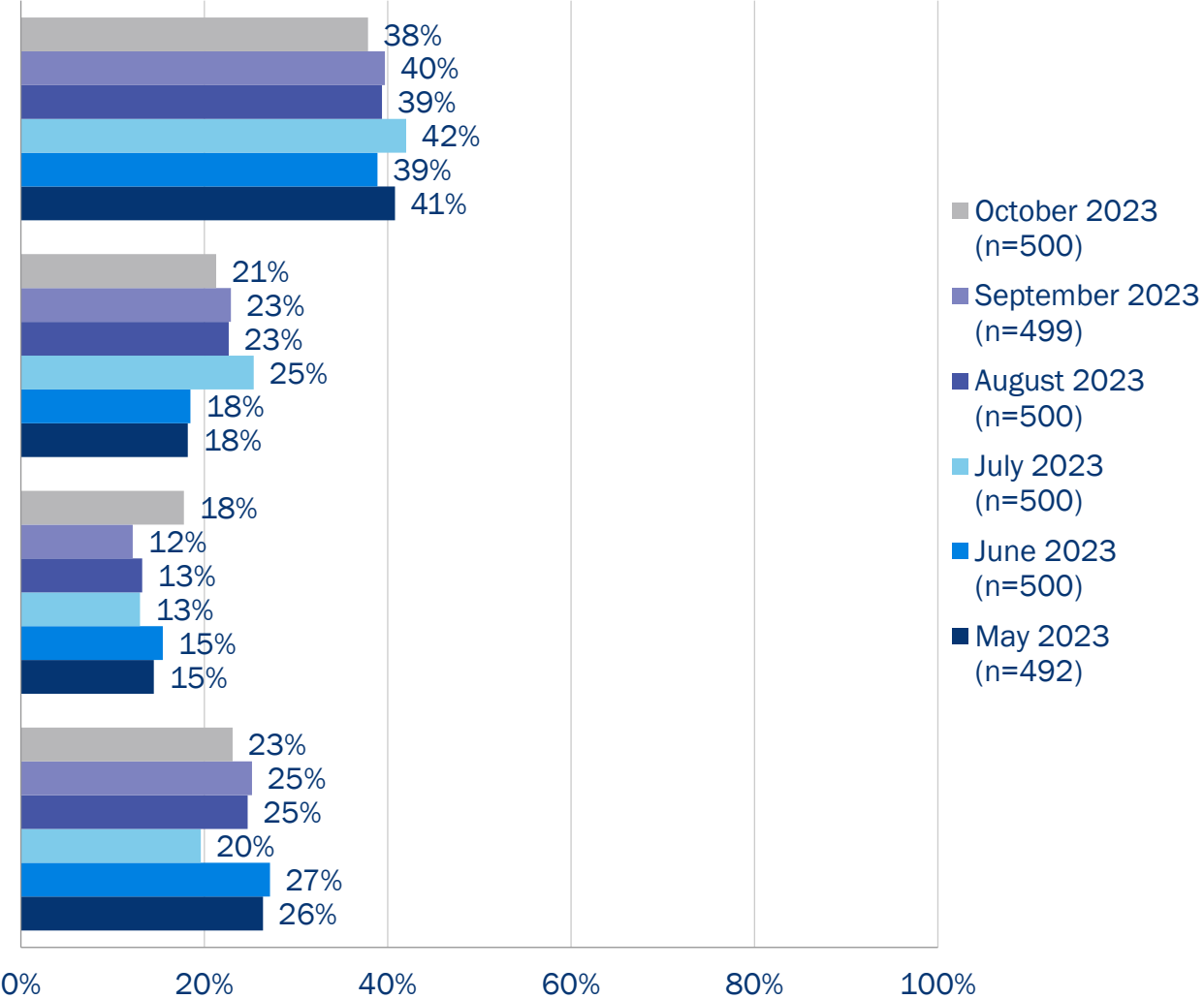
Which statement is true about pre-cooling?

Pre-cooling before 4 p.m. uses more clean energy from solar panels as compared to regular cooling during 4 – 9 p.m.

Pre-cooling before 4pm uses the same energy resources as regular cooling from 4 – 9 p.m.

Pre-cooling before 4 p.m. uses more energy from “dirty sources” as compared to regular cooling from 4 – 9 p.m. which uses more clean energy from the sun.

None of the statements are true.



## Californians have continued to confuse the underlying reason for Flex Alerts with PSPS and overestimate the capacity of battery storage since launching the campaign in 2021.

Please select whether you think the following statements about California (CA) are true or false.

Statement	Percentage of respondents who gave correct answer					
	May 2023 (n=493)	Jun. 2023 (n=500)	Jul. 2023 (n=500)	Aug. 2023 (n=500)	Sep. 2023 (n=500)	Oct. 2023 (n=500)
On hot sunny days, when many people use their air conditioners, CA's electricity demand may exceed its supply	86%	91%	89%	90%	90%	90%
When an unusually high amount of electricity is used, there is a risk that there will not be enough electricity for all Californians and the power grid operator may need to create localized power outages to protect the grid	84%	81%	81%	82%	84%	82%
CA's electricity supply is most limited in the morning hours when solar power plants are not fully up and running yet and Californians are using more electricity ( <b>False</b> )	62%	68%	63%	65%	65%	64%
CA's electricity supply is most limited in the evening hours when solar panels start to generate less electricity and Californians are using more electricity	67%	63%	63%	60%	60%	64%
In CA, innovations in battery storage have made it possible to store enough energy generated by solar panels when the sun is shining to completely power our electricity grid when it gets dark ( <b>False</b> )	44%	39%	38%	36%	39%	39%
When an unusually high amount of electricity is used, the power grid operator may ask Californians to conserve energy to prevent wildfires ( <b>False</b> )	26%	22%	20%	19%	20%	22%

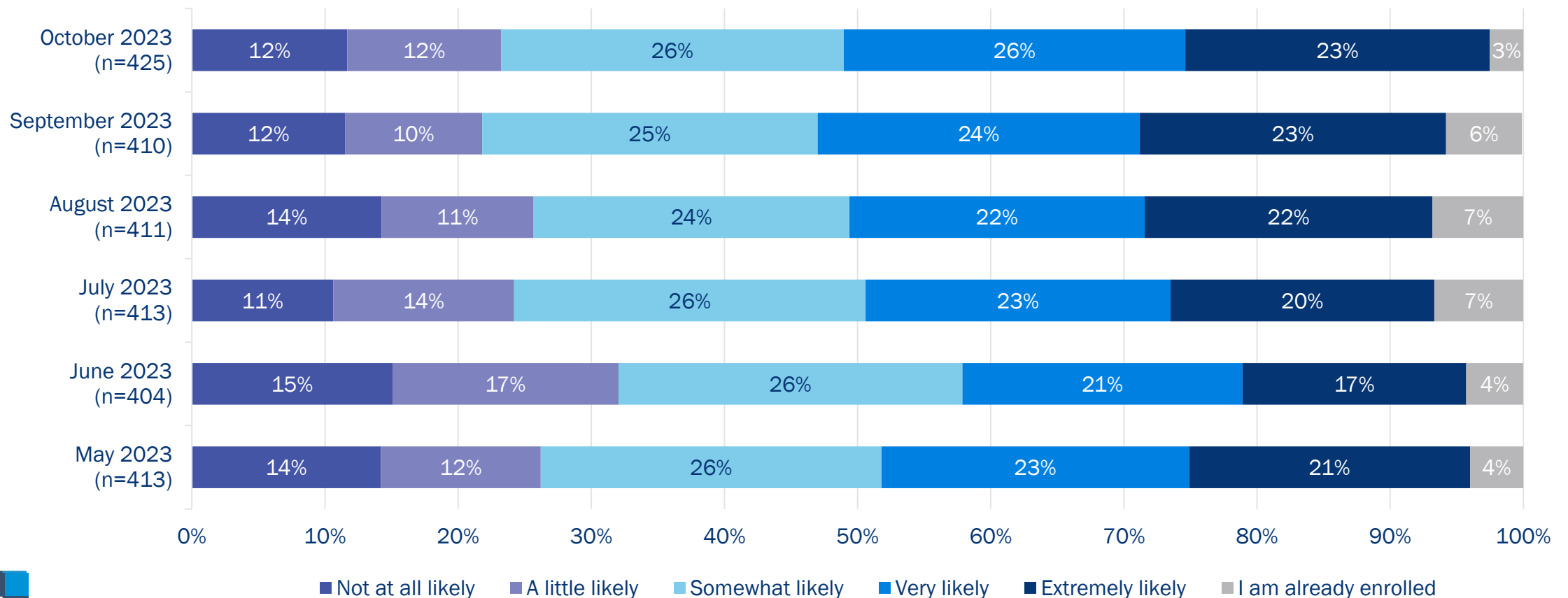


LIKELIHOOD TO SIGN UP FOR POWER  
SAVER REWARDS & INTENT TO ACT

# On average, over two-fifths of Californians reported they were very or extremely likely to sign up for Power Saver Rewards; only slightly fewer than observed in 2022.

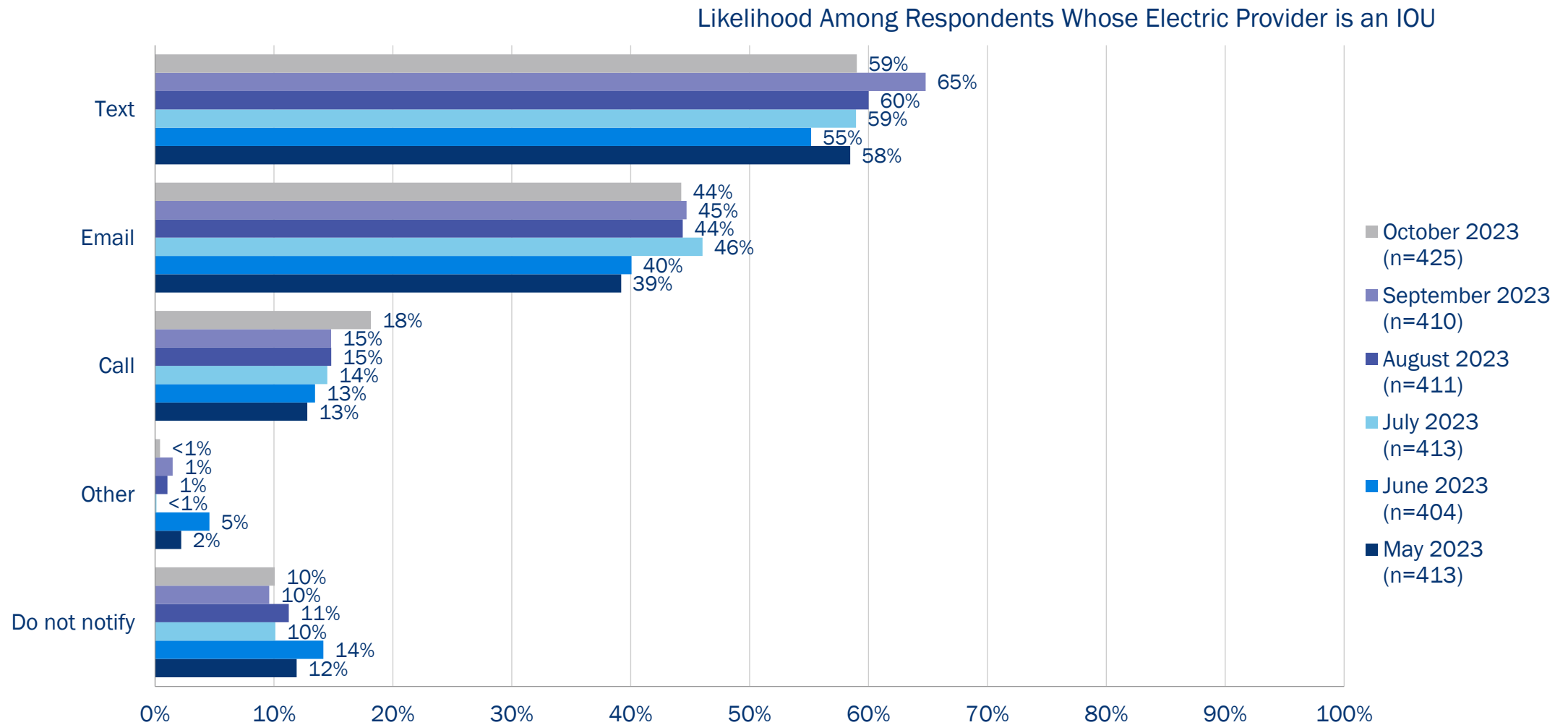
How likely are you to enroll in the Power Saver Rewards program in the next couple of months?

Likelihood Among Respondents Whose Electric Provider is an IOU



**Eligible PSR participants continue to prefer to be notified about upcoming Flex Alerts through texts, so that they may earn rewards; a trend that has continued since we began measuring in June 2022.**

How would you prefer to be notified about an upcoming Flex Alert so that you might have a chance to earn Power Saver Rewards?





Over the campaign period, Californians’ reported likelihood to take action increased across multiple promoted energy-savings actions; all of which have an “\*” below.

Please rate the likelihood of taking each action on hot days.

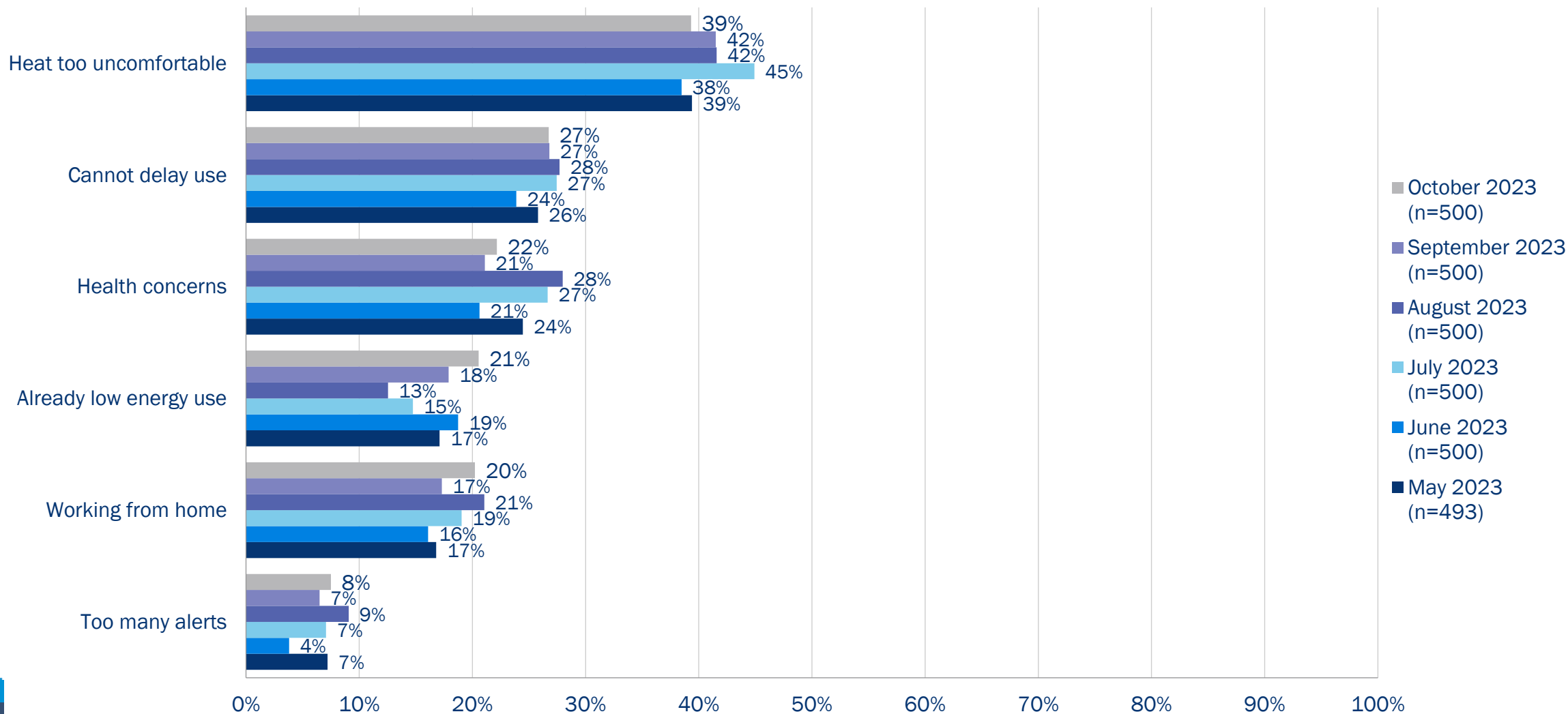
Statement	Percentage of respondents that selected “extremely” or “very” likely					
	May 2023 (n=493)	Jun. 2023 (n=500)	Jul. 2023 (n=500)	Aug. 2023 (n=500)	Sep. 2023 (n=500)	Oct. 2023 (n=500)
Turn off all unnecessary lights between 4pm and 9pm*	63%	65%	71%	74%	70%	69%
Do your dishes or laundry before 4pm or after 9pm*	52%	59%	66%	68%	64%	62%
Charge your electronic devices before 4pm or after 9pm*	53%	55%	60%	60%	62%	58%
Pre-cool your home*	45%	48%	55%	55%	53%	52%
Use fans for cooling between 4pm and 9pm	52%	50%	53%	54%	52%	52%
Unplug unused items between 4pm and 9pm*	44%	49%	57%	51%	51%	51%
Set thermostat to 78 degrees or higher between 4pm and 9pm	41%	44%	49%	44%	44%	44%
Run your AC cooler before 4pm*	37%	39%	47%	48%	48%	44%
Turn off AC between 4pm and 9pm	36%	31%	36%	32%	33%	34%



# FLEX ALERT BENEFITS AND BARRIERS

**As observed in 2022, Californians most frequently identified concerns about getting too hot, an inability to shift their energy use, and health concerns as barriers to taking actions during a Flex Alert over the campaign.**

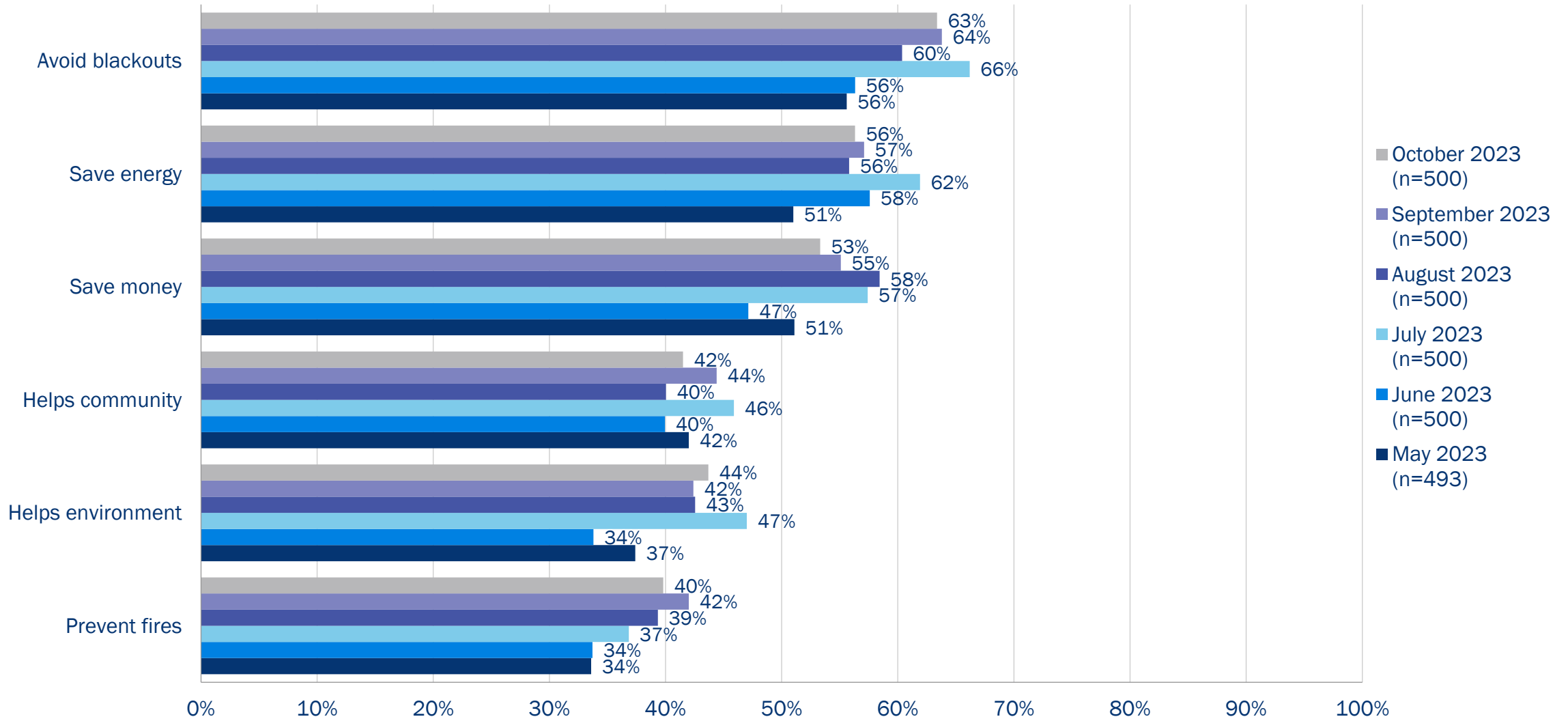
What barriers do you see to taking action during a Flex Alert?



Note: 19% of respondents selected "None" and 6% selected "Don't know." Response options removed from figure in Wave 5 of 2023.

As observed in 2022, avoiding blackouts, saving energy, and saving money were most frequently identified as benefits of taking action during a Flex Alert over the campaign period.

What benefits do you see from taking action during a Flex Alert?





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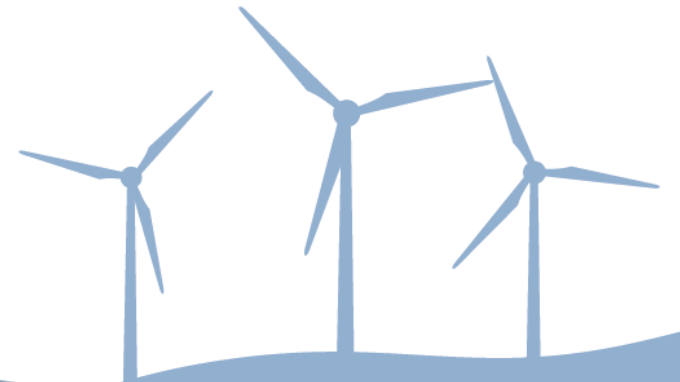
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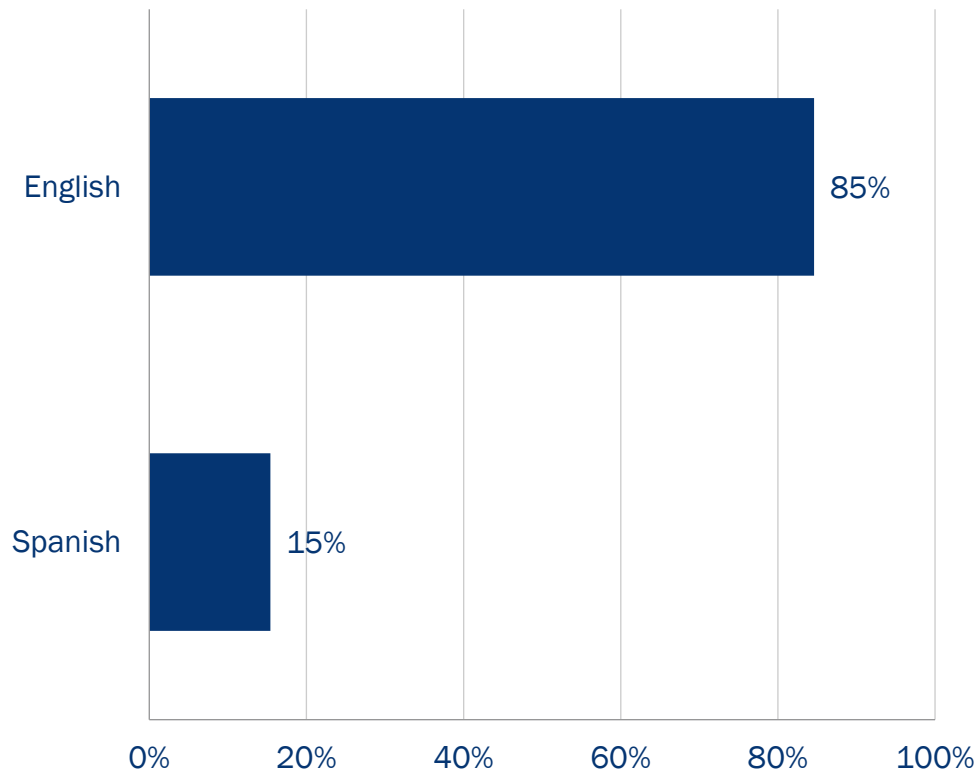
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# APPENDIX

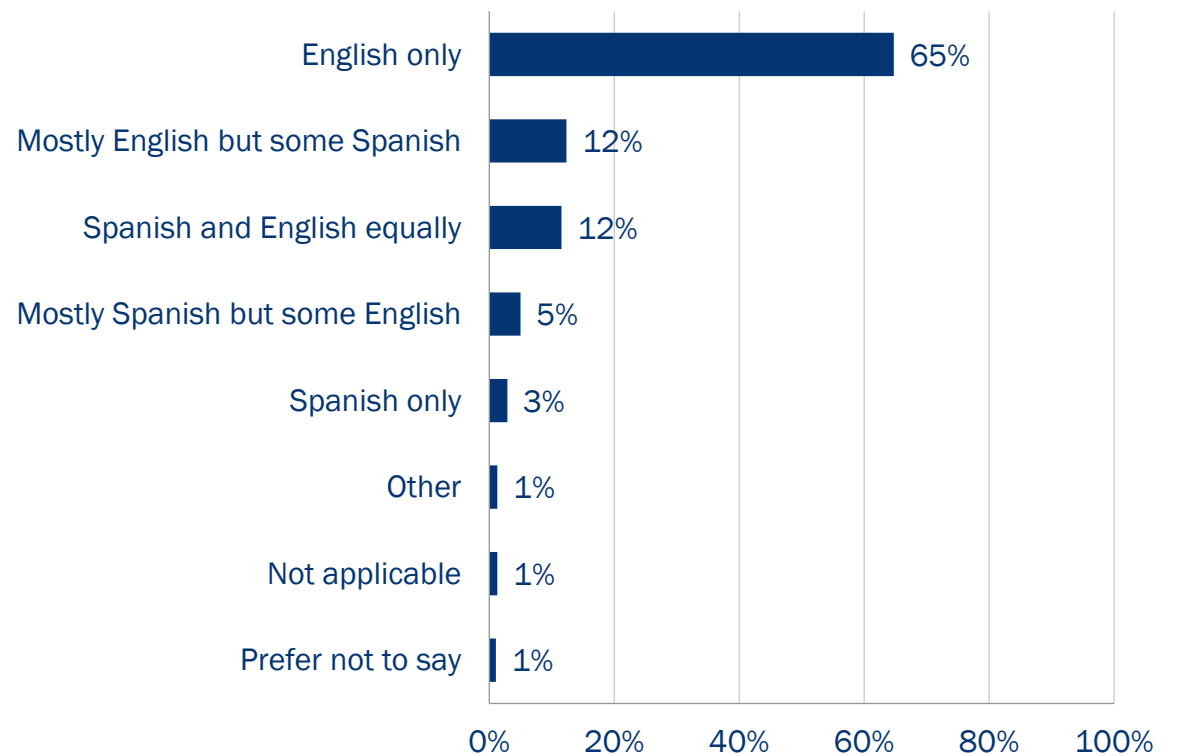


# Although a minority of respondents completed the survey in Spanish across the 2023 campaign, one-third reported they speak at least some Spanish in their home.

What is your preferred language to take this survey? (n=2,993)



What level of Spanish/English is spoken in your home? (n=2,993)



Note: Language data displayed is unweighted as it reflects demographics of the specific respondent sample. When data weights were applied to analyses, Spanish-speaking representation increased to nearly one-third of survey respondents across all six waves (32%).