

The Role of Behavioral Approaches in Utility Customer Experience



BECC Conference
November 2013

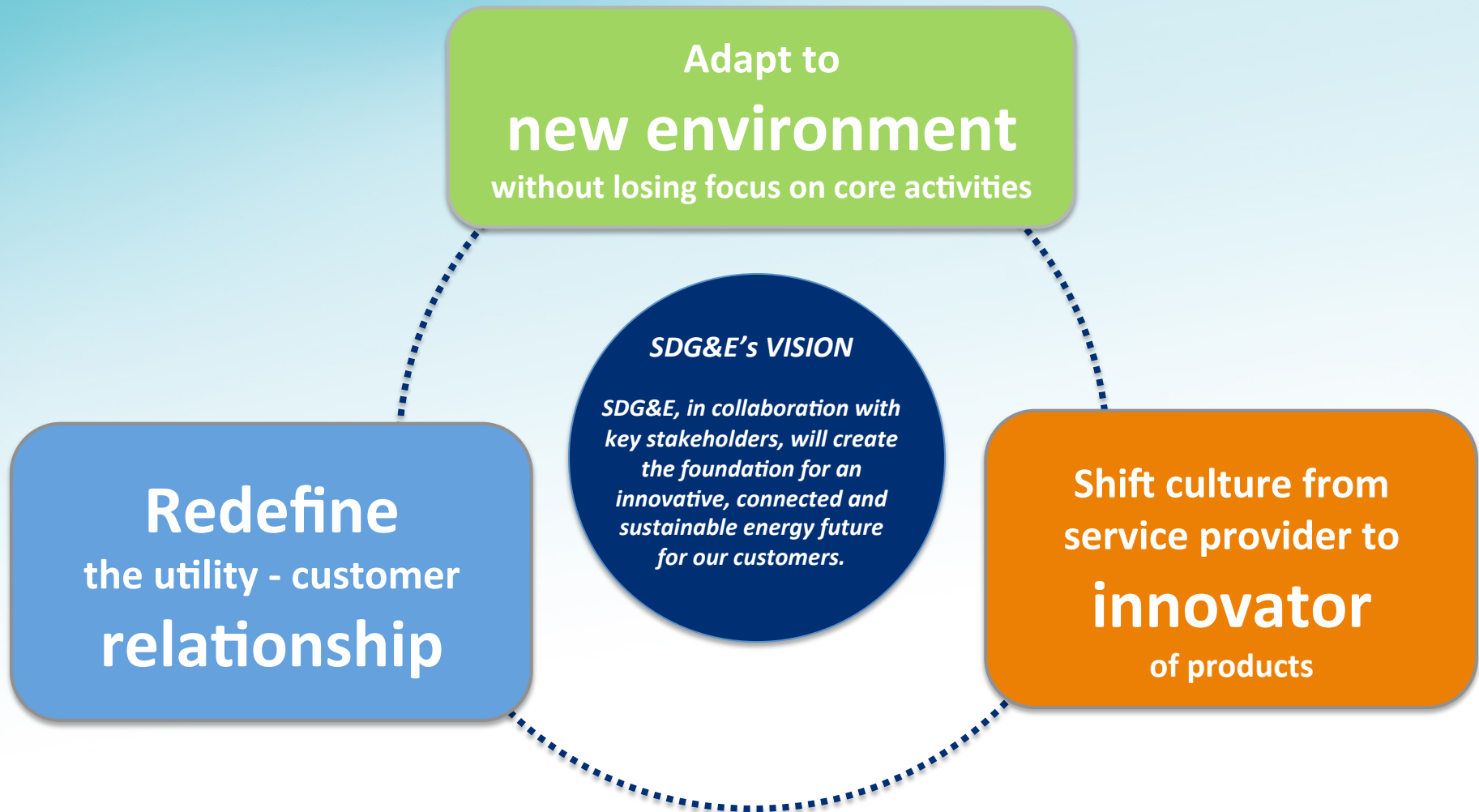


SDG&E Overview

- Serving 3.5 million electric and gas consumers
- 1.4 million smart electric and 850,000 smart natural gas meters
 - 1.3 million residential customers
 - 100,000 business customers
- 5,000 employees
- Strong commitment to energy efficiency and demand response



A Changing Mindset



Our Pledge...To Be Customer Focused



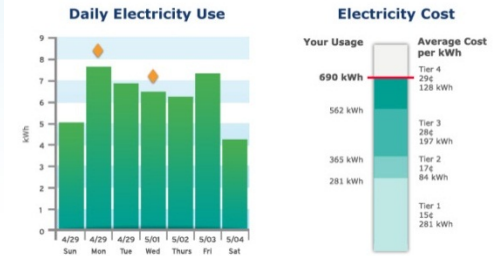
Gas Use Summary

Meter Number: 0123456
Amount of gas used is <##> therms since <date>.

Electric Use Summary

Meter Number: ***4567
Amount of electricity used is <##> kWh since <date>.
Based on your electricity use, you are in Tier <#>.

Estimated data



By offering **the right information** to **the right customers** through the **right channels** at the **right times**, we enable customers to adopt smart energy solutions

These charts show a weekly view of your energy use. For more details and to analyze your energy use, log into My Account and click on the My Energy tab.

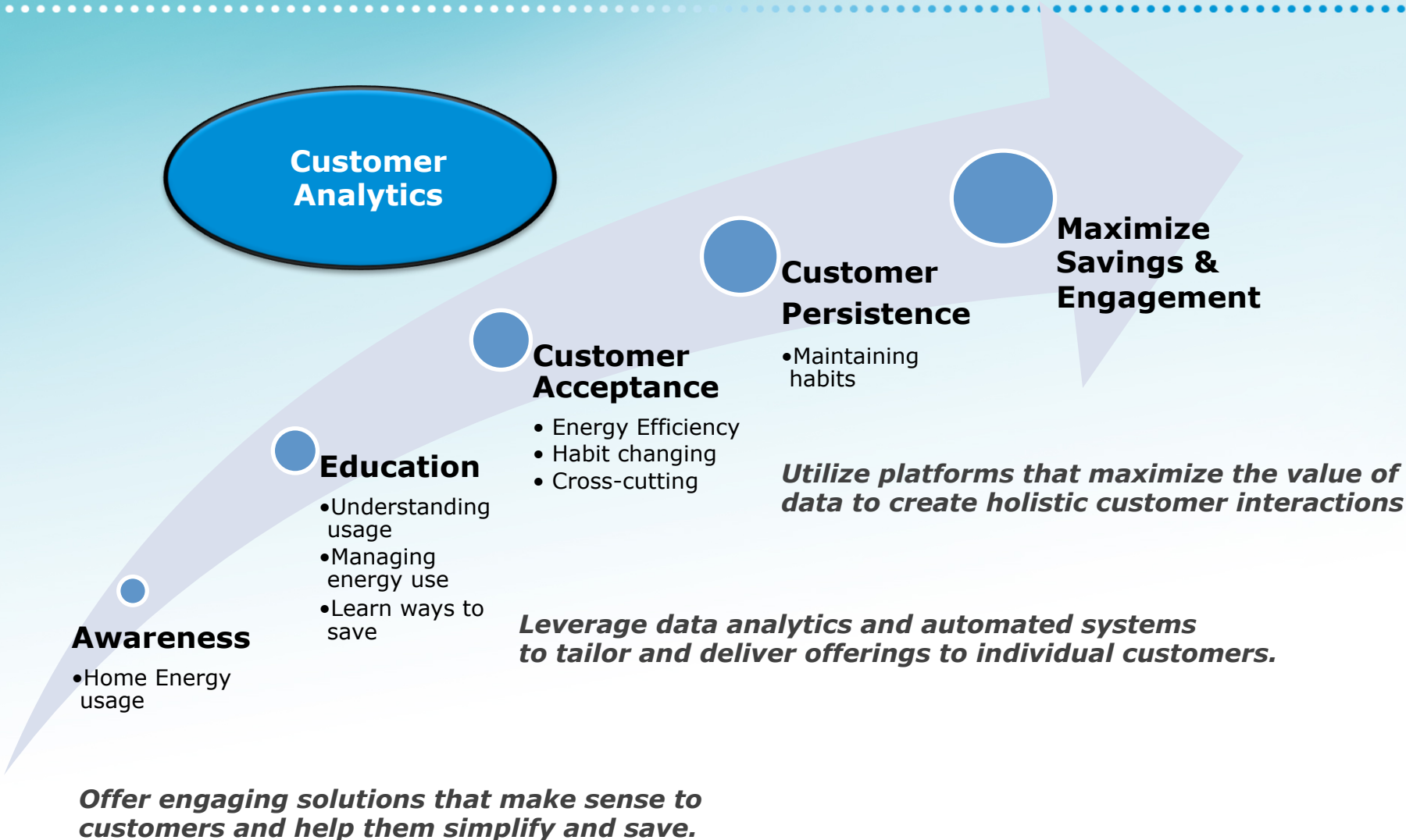
All calculations are approximate and may include estimated data. Please refer to your monthly bill for actual use information.

Savings Tips

To save energy and money try these tips:

- Use compact fluorescent lights in place of incandescent lights
- Watch your thermostat settings, and turn off furnaces when you're not home
- Turn off computers when not in use

Customer Engagement Curve

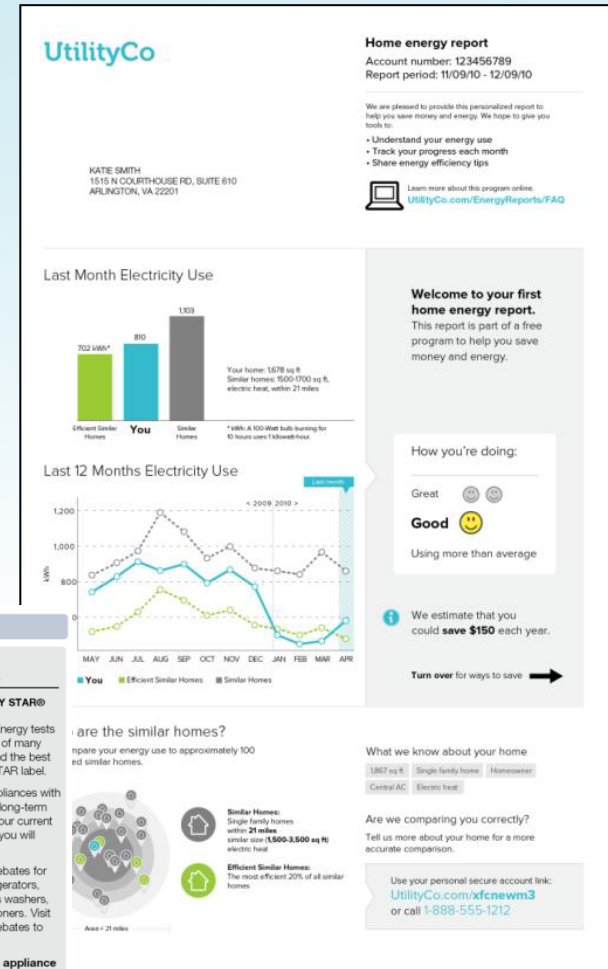


Behavioral Programs: The Foundation for Utility Customer Engagement Strategies

- Not all customers are alike – Segmentation with proactive personalized messaging
- Providing the right products and services to the right customer via their preferred delivery channel is the key
- Rates + Programs + Technology + personalized customer engagement = Success
- Increased energy savings and demand response *AND* increased customer satisfaction at a lower over-all cost of delivery...Integrated Demand Side Management

Home Energy Reports

- A behavior program that provides participants with:
 - Information about home energy use
 - Ideas for how to save energy and money
 - Neighbor comparison
 - Personal comparison
 - Recommendations
- Annual energy savings of 1.9% Elec 1.5% Gas



UtilityCo

Home energy report
Account number: 123456789
Report period: 11/09/10 - 12/09/10

We are pleased to provide this personalized report to help you save money and energy. We hope to give you tools to:

- Understand your energy use
- Track your progress each month
- Share energy efficiency tips

Learn more about this program online.
UtilityCo.com/EnergyReports/FAQ

KATE SMITH
1515 N COURTHOUSE RD, SUITE 610
ARLINGTON, VA 22201

Last Month Electricity Use

702 kWh* Efficient Similar Homes | **You** 850 | 1,003 Similar Homes

Your home: 1,678 sq ft
Similar homes: 1,600-1700 sq ft, electric heat, within 21 miles

*kWh: A 100-Watt bulb burning for 10 hours uses 1 kilowatt-hour.

Last 12 Months Electricity Use

Line graph showing kWh usage from May to April for You, Efficient Similar Homes, and Similar Homes. Includes a comparison to 2008 and 2010.

How you're doing:

Great (👍👍)
Good (😊)
Using more than average

We estimate that you could **save \$150** each year.

Turn over for ways to save →

Action Steps | Personalized tips chosen for you based on your energy use and housing profile

Quick Fix
Something you can do right now

Set your thermostat for comfort and savings
Heating and cooling your home can account for more than 50% of your total energy use. By setting your thermostat appropriately, you can be comfortable and save energy. When you are away from home or sleeping, change the thermostat to an energy-saving level—a 5 degree adjustment from your desired temperature is a good rule of thumb. Consider a programmable thermostat for added convenience.

SAVE UP TO \$165 PER YEAR

Smart Purchase
Save a lot by spending a little

Save with LED holiday lights
Holiday lights can add charm to your home, but they also increase your electricity bill. If you are in the market for new holiday lights, instead of purchasing standard incandescent bulbs, opt for new technology: Light Emitting Diode (LED) lights. Although LED lights may cost more up-front, they save money in the long-run, because they are more energy-efficient and last longer. Also—they are available in a wide range of colors and bulb shapes.

SAVE UP TO \$25 PER 100-BULB STRAND PER SEASON

Great Investment
A big idea for big savings

Look for the ENERGY STAR® label
The Department of Energy tests the energy efficiency of many home appliances, and the best earn the ENERGY STAR label. Replace your old appliances with ENERGY STAR®s for long-term savings—the older your current appliance, the more you will save! ComEd now offers rebates for ENERGY STAR refrigerators, dishwashers, clothes washers, and room air conditioners. Visit www.ComEd.com/rebates to learn more.

Save up to 40% on appliance energy cost

are the similar homes?
Compare your energy use to approximately 100 other similar homes.

What we know about your home
1,678 sq ft | Single family home | Homeowner
Central AC | Electric heat

Are we comparing you correctly?
Tell us more about your home for a more accurate comparison.

Use your personal secure account link:
UtilityCo.com/xfcnewm3
or call 1-888-555-1212

Biggest Energy Saver – Winner Profiles

BIGGEST ENERGY SAVER: Erica F. and Family, Lakeside



SAVINGS	“When we first learned of the contest, my husband said, ‘we’re going to win this.’ So, we started looking for ways to save energy. We changed chemicals in the pool so we could turn off the pool pump, we plugged our home entertainment system into a power strip and made sure it was off when we weren’t watching it, and we turned off our computers instead of just letting them go to “sleep.” Near the end, when it got close, we cut back on TV and washed our dishes by hand.”
46.5%	
1,356 kWh	“I’ll admit, we got <i>really</i> into the contest. All of the my friends knew about it and they wrote notes on my Facebook wall encouraging us to keep it up.” “We didn’t win any of the three drawings for an iPad; but, now that I think about it, we saved more than enough money to buy a brand new iPad!”

MONTHLY DRAWING WINNERS

September: Josephine G., Alpine



SAVINGS VS 2010
34.2%
1,506 kWh

“Every time I can see that there are other people on the leaderboard saving more energy than I am, I’m motivated to save even more.”

October: Linda H., La Mesa



SAVINGS VS 2010
42.8%
1,488 kWh

“I had no idea how much energy the ‘can lights’ in the kitchen used – and, I probably never would have thought to investigate that – but, the daily reminders motivated me to. Now, unless I need all of those lights, I use as few as possible.”

November: Tracy G., Santee*



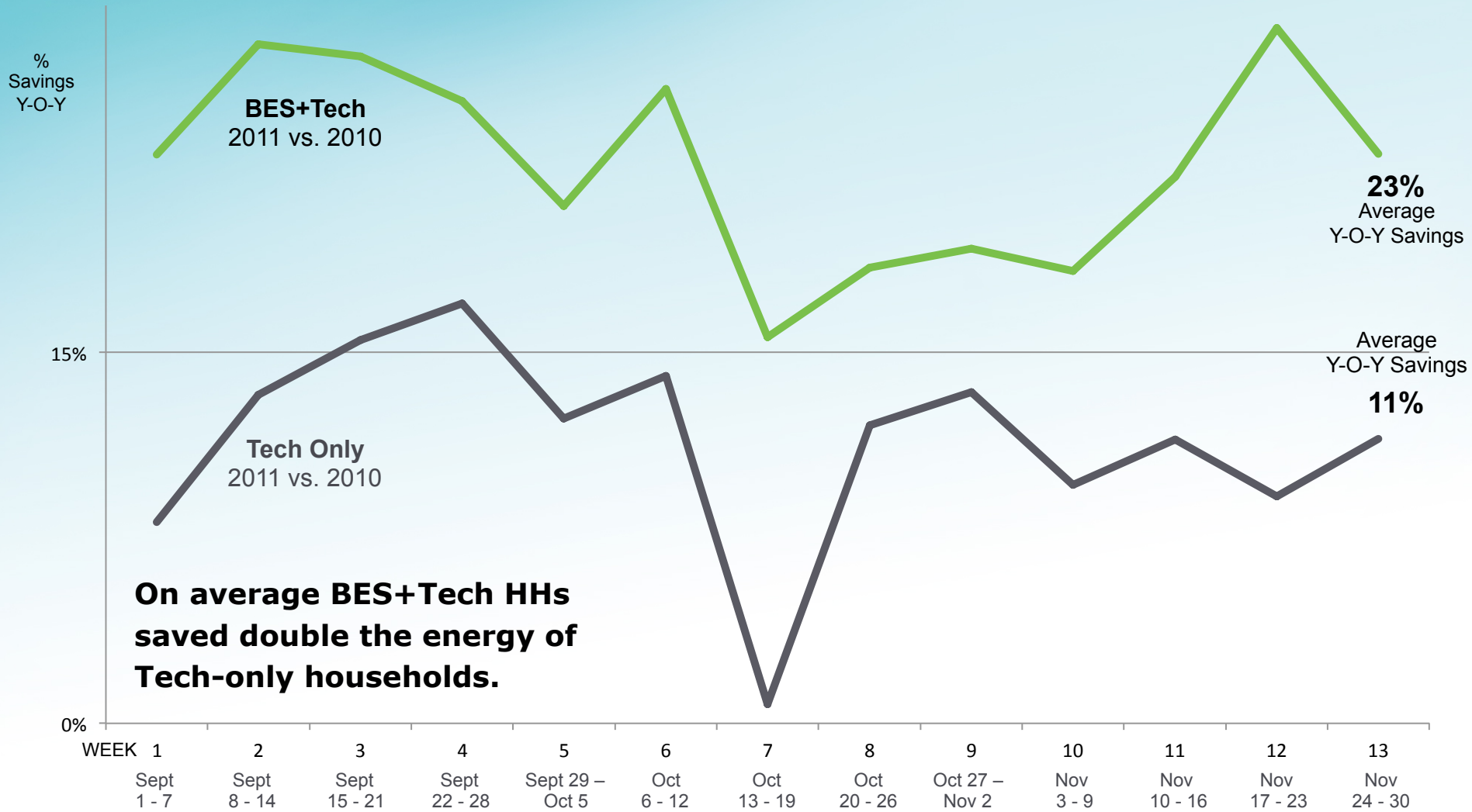
SAVINGS VS 2010
12.6%
106 kWh

“We paid a lot of attention to the daily updates. In fact, when my boyfriend’s brother came to visit, I saw our energy use going up. When he left, I could really see the difference. It’s just amazing how much we were saving.”

*Joined 11/1/11; Only November data included.

Biggest Energy Saver

Year-over-Year Average Daily Savings



Tech HH sample size 200 - BES + Tech sample size 33

San Diego Energy Challenge Success

Three primary goals:

- ✓ Enable access to consumption
- ✓ Empower residential customers to better manage their electricity use
- ✓ Support the use of third-party tools and software products

Components of the Challenge:

- **Community-based:** Customers “play” for a SDUSD middle-school and individual prizes
- **Game mechanics:** Customers earn points, prizes, and rewards for behaviors
- **Multi-Platform:** Customers are engaged on social networks, web and email

1,000,000+

Personalized customer messages sent

42,400

Customers receiving weekly energy emails

\$26,500

Prizes awarded to nine local schools

39

San Diego middle schools engaged

27%

Web activation rate of emailed customers

7

Peak events with prize competitions

Energy Efficiency - overall energy savings of 6% during summer and 2% during winter.

Peak Demand Reduction – on peak demand reduction of an additional 2.2%



San Diego Energy Challenge User Experience



The screenshot shows the app's home screen with a dark header containing navigation links: Home, Leaderboards, Schools, Reports, and a 'Saver Days' indicator showing 4 collected this month. The main content is divided into three sections: 'Leaderboards' with a list of friends and their scores, 'Recent Activity' with a feed of achievements, and 'Your Last Few Days' with a bar chart of energy usage.



This screenshot displays the 'My Usage' screen, featuring a bar chart of hourly energy usage in kWh. The chart shows a clear daily cycle with higher usage during the day and lower usage at night. Below the chart, there is a disclaimer and branding for SimpleEnergy and SDGE.

Excel at the challenge

- 8 friends**
See how your savings compare
- 4 Saver Days**
How do I collect Saver Days?
- 7 badges**
See all of your badges
- 17738 Total Points**
How do I earn more points?

Daily Challenge

Save with LED holiday lights
Switch to LED holiday lighting to use less electricity

I completed this!

Back Next

How to score points

- By saving energy**
We calculate your energy savings compared to your usage last year on similar weather days.
- By inviting your friends**
Earn up to 5 points per friend that you get to sign up for the Challenge.

Back Next

How to win prizes

- Daily Prizes**
Every day you collect a Saver Day you'll have a chance to win a gift card.
- Monthly Prizes**
Every month we'll enter your Saver Days into a drawing for your chance to win an iPad.

Back Next

Check out your progress in the Energy Challenge

DEC 02	DEC 03	DEC 04	DEC 05	DEC 06	DEC 07	DEC 08

Days you used less energy than similar households
 Saver day collected

[Learn more](#)


Your achievements this week

2 SAVER DAYS	12 TOTAL BADGES	3,165 POINTS
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Invite friends to the Energy Challenge today! The more friends you invite the greater your chances of winning.

Earn a prize entry for every three friends you invite and for every accepted invitation through February 18, 2013.

[Invite friends now](#)



Time is running out. Invite friends today.

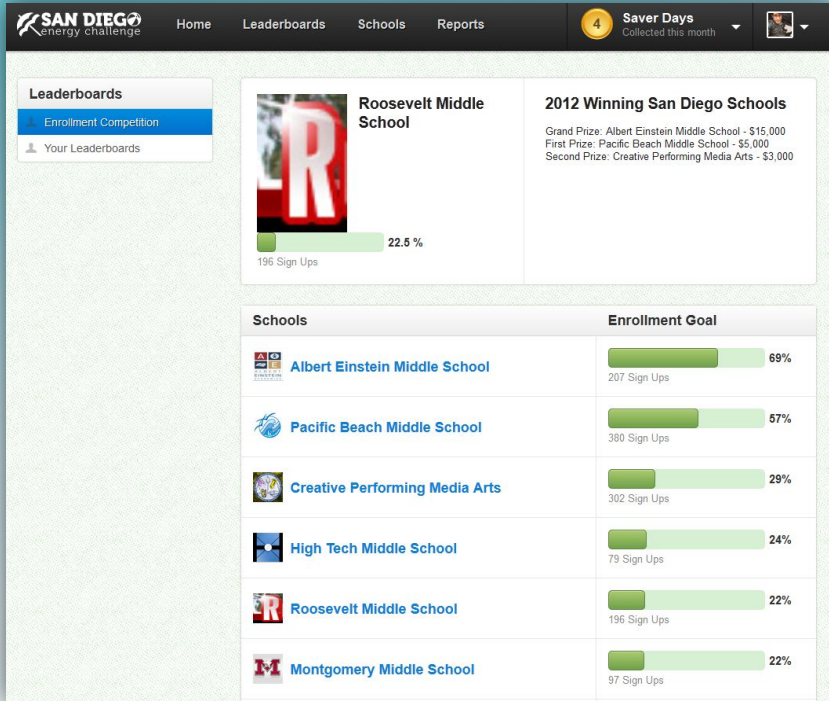
Share the Energy Challenge now with just three friends and you could win big.

Earn a prize entry for every three friends you invite and for every accepted invitation through February 18, 2013.

[I want in, just in time](#)



San Diego Energy Challenge Community Experience



SAN DIEGO energy challenge Home Leaderboards Schools Reports 4 **Saver Days** Collected this month

Leaderboards
Enrollment Competition
Your Leaderboards

Roosevelt Middle School
22.5%
196 Sign Ups

2012 Winning San Diego Schools
Grand Prize: Albert Einstein Middle School - \$15,000
First Prize: Pacific Beach Middle School - \$5,000
Second Prize: Creative Performing Media Arts - \$3,000

Schools	Enrollment Goal
Albert Einstein Middle School	69% 207 Sign Ups
Pacific Beach Middle School	57% 380 Sign Ups
Creative Performing Media Arts	29% 302 Sign Ups
High Tech Middle School	24% 79 Sign Ups
Roosevelt Middle School	22% 196 Sign Ups
Montgomery Middle School	22% 97 Sign Ups



YMCA Youth & Family Services shared a link.
October 22


We're partnering with SDG&E for the San Diego Energy Challenge, an energy savings competition for all San Diego Unified School District residents. Sign up, save energy and you have the opportunity to win prizes for your household and for a SDUSD middle school of your choice!

 San Diego Energy Challenge - Save Energy & Win Prizes! Sign Up Now! Presented by SDG&E and Simple En
sdenergychallenge.com


Unlike - Comment - Share 1 1

You like this.

San Diego Energy Challenge Thanks so much for helping us get the word out about our energy savings competition sponsored by San Diego Gas & Electric!
November 1 at 4:22pm · Like

 **Jerry Sanders @MayorSanders** 15 Aug

Are you up to the challenge of saving energy & supporting your @sdschools middle school? Sign up: sdenergychallenge.com/#sdenergychall...

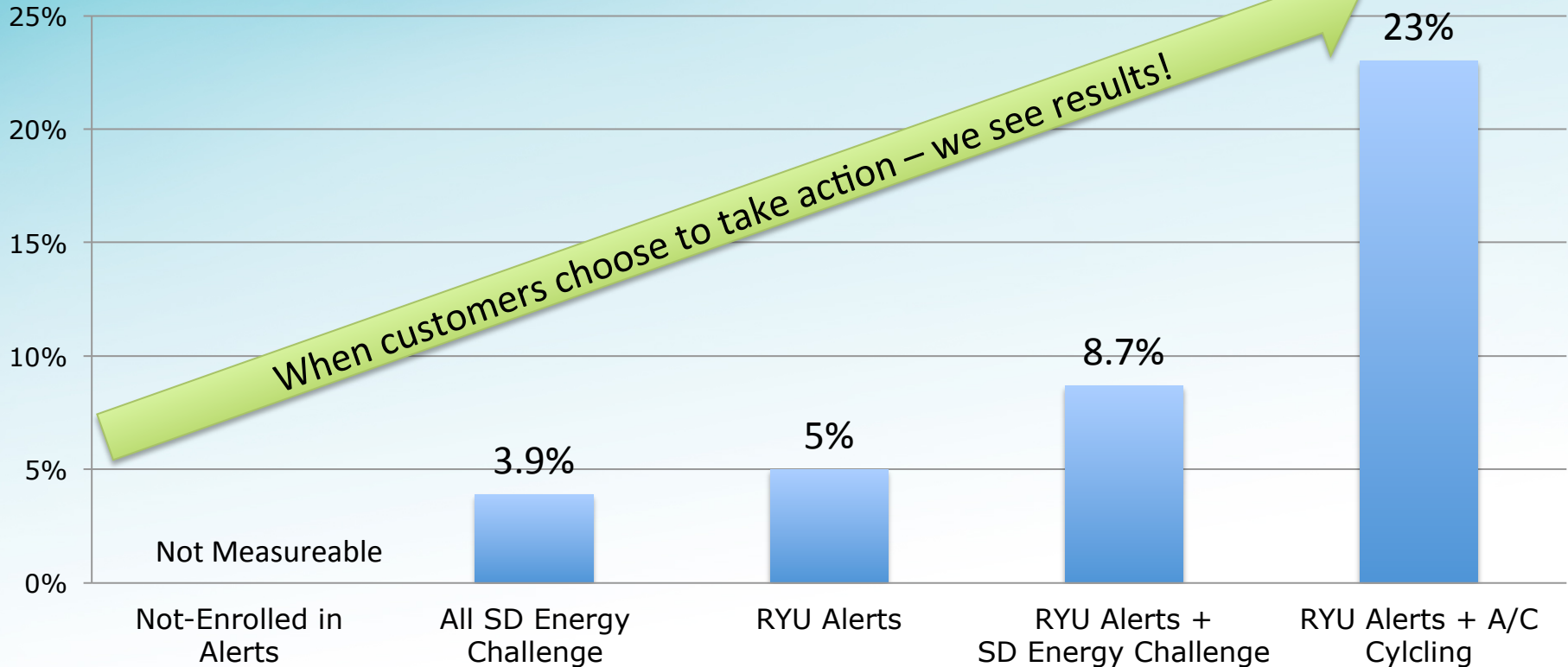

www.northparkid.org

NPCA News ... keeping North Park Informed October 21, 2012

Save Energy & Help SDUSD Middle Schools Earn Cash Prizes
SDG&E is currently sponsoring the San Diego Energy Challenge contest. Through San Diego Energy Challenge, San Diego Unified School District (SDUSD) area residents are eligible to lower their bills and earn a bill credit on [Reduce Your Use](#) days, while simultaneously competing to raise money for the local middle school of their choice. Sign up for the program today to help our middle schools win cash grants!

Awareness & Engagement Drives Results

Load Reduction



Note: San Diego Energy Challenge results are incremental to an approximate 6% behavioral conservation
Reduce Your Use (RYU) is SDG&E's Peak Time Rebate Program (PTR)

Manage-Act-Save

ENGAGE = Customer Analytics Platform

Analyze, segment and micro-target customers with focused messaging and will analyze customer response trends to integrate continuous learning...

ENLIGHTEN = Energy Insights Reports

Deliver customized (weekly) email or (monthly) paper reports to targeted customers that include relevant tips and offers they would expect to get from their trusted energy advisor...

ENTERTAIN = Gamification Platform

Facilitate a number of strategies to increase customer interest in learning about energy use including competition, badges, neighbor and historical comparisons, chances for drawings and rewards for actions...



The screenshot displays the SDGE Connected website interface, which is designed to engage customers through gamification and personalized energy insights. The main navigation bar includes the SDGE logo and the text "A Sempra Energy utility".

Weekly report for April 1-7th, 2013

Join the challenge!
Compare your energy friends and neighbors.

energy challenge

★ ★ ★
You're in the top 25% of savers on any day. Maintain your lead this month more ways to save.

energy portal

energy usage over the past 12 months

Showing usage for: December
21 kWh Used

Energy Insights
Receive targeted messages designed to help you better understand how your home uses energy and how you can save. You will see how your home energy use compares to others, how you use energy over time and what actions you can take to use less electricity.

Products & Services
Take your energy savings to the next level. Learn about special programs and services provided by San Diego Gas & Electric designed for your needs.

Rewards
In addition to daily prizes, the points you earn in this program will be redeemable for special rewards offers from local and national merchants. The SDGE Rewards Store will be available soon.

Privacy
We take your privacy very seriously. Read more about it here: [Privacy Policy](#).

Questions?
View our [Frequently Asked Questions](#).

EARN 100 POINTS
Go paperless!
Want to see more?
Detailed energy use information
Rewards points & prizes
Comparisons with friends & neighbors

Sign up for free today!

Visit your energy portal

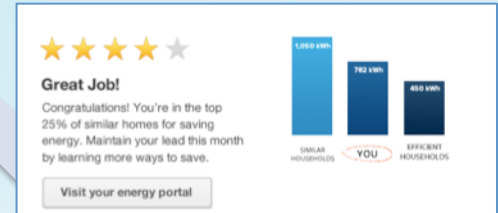
Important Note on Privacy: Your personal information and detailed energy use will not be disclosed in any way. Your energy score will be shown to others, but it is calculated in such a way as to hide any identifying characteristics about you or your household. Maintaining your privacy is our highest priority.

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Customer Centric Experience



Energy Insights



Rewards

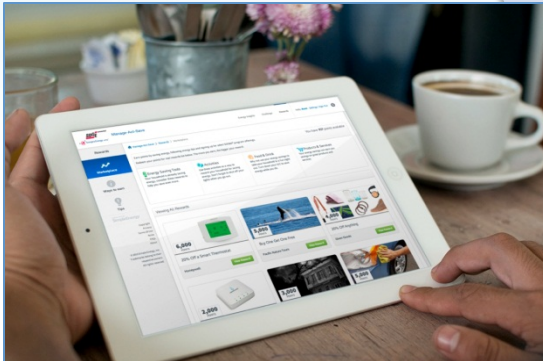


Actions & Points

21,014
Points Available



Badges & Feedback



Thank You

Questions?

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