

2030 Zero Carbon Project Community Meeting Research December 2020 – Final Draft



Zero Carbon Plan Community Meetings

- Opportunity to share SMUD's Clean Energy Vision and get input from customers into the Zero Carbon Plan
- Invited a diverse group of customers
 - Random sample of residential customers
 - Residential insight community members
 - Social media / list serv
 - Community group members
- Customers attended the 1-hour SMUD presentation/Q&A and completed the follow-up survey
 - Good representation from solar (22%) and EAPR (16%) customers



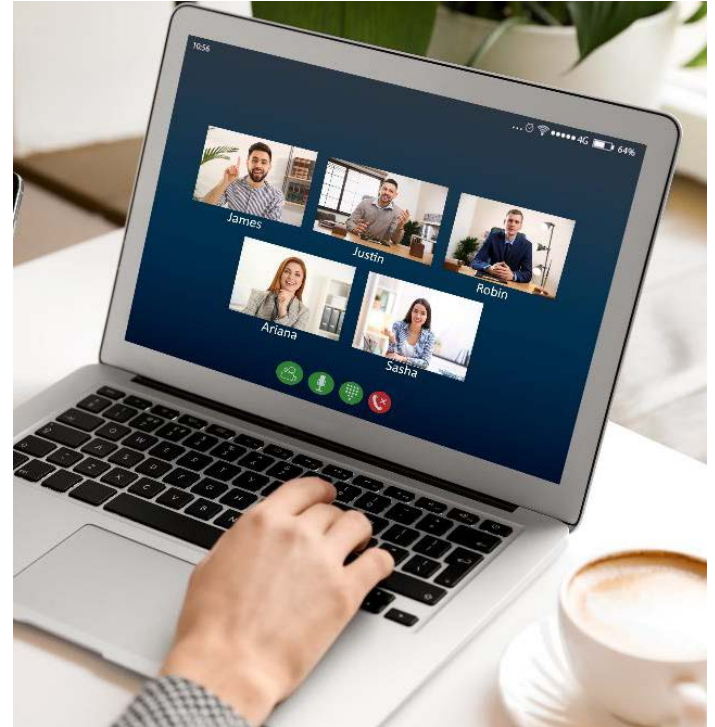
Objectives

- Measure customer **attitudes about clean energy** and how we can engage them in becoming partners in decarbonizing the grid
- Obtain feedback on the **goal of Zero Carbon**
- Determine customers' **plans to invest** in solar, storage or electric vehicles

Methodology

- Respondents received online surveys after attending 1+ hr. SMUD presentation and Q&A
- 284 responses for Residential (72% response rate)
- 43 responses for Community Groups (52% response rate)

*Note: Because these customers “self-selected” to attend the 1-hour webinar and heard the information in the SMUD presentation, they **may not be representative of SMUD’s overall customer base**. Additional quantitative research is planned to verify these findings.*



Executive Summary

Note: These findings are from a survey with attendees of the Zero Carbon Plan Community Meetings and may not be representative of the SMUD general population. Additional research is planned to verify these findings in future quantitative studies.



The vast majority of residential and community group attendees feel that it is extremely or very important to improve air quality in the Sacramento area.



Similarly, the majority of residential and community group attendees indicated that they “loved” SMUD’s Zero Carbon goal.



The top 3 ways attendees felt SMUD should support the community were to: provide affordable electricity options, reliable energy and achieve zero carbon in a way that benefits all communities.



In general, 60% of residential and 77% of community group attendees indicated that they are very willing to partner with SMUD by personally taking action to reduce Sacramento GHG.



39% of attendees say they are very likely to purchase smart home technologies in the next 12 months. Almost one-fourth are very likely to purchase/lease EVs or rooftop solar, while slightly fewer (17%) are very likely to purchase/lease a battery.



When asked how much they would be pay voluntarily, almost half of attendees claimed they are willing to pay up to \$10 more per month to support the Zero Carbon plan. However, almost one-fourth were not willing to pay any more.

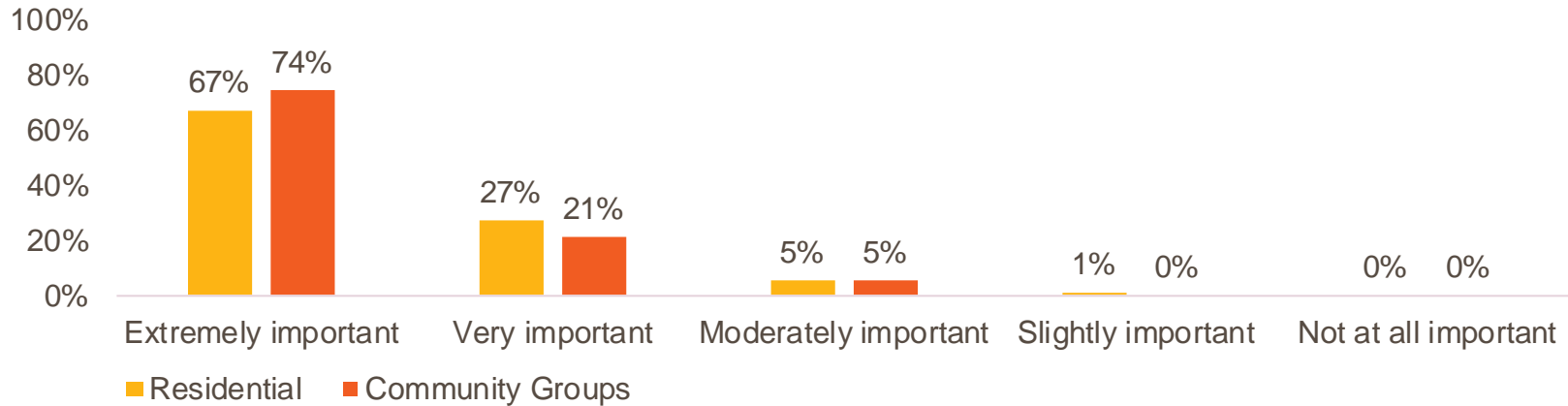


Almost 6 of 10 attendees stated they are very likely to respond to tips from SMUD to reduce their GHG emissions. 43% said they are very likely to participate in a Demand Response program and 30% to replace their gas appliances with electric.

Detailed findings

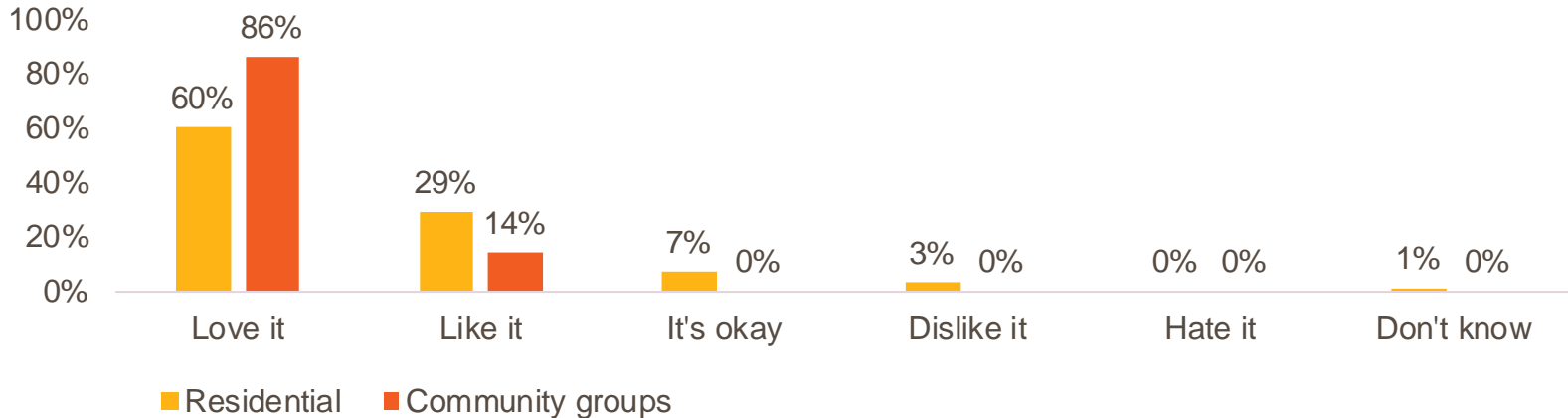
Importance of air quality

The vast majority of residential and community group attendees felt that it was extremely or very important to improve air quality in the Sacramento area. Significantly more low-income customers (<\$40K) rated this as extremely important than those with higher incomes (\$40-\$200K) (84% vs. 66% respectively).



SMUD Zero Carbon goal

60% of residential and 86% of community group attendees indicated that they “loved” SMUD’s Zero Carbon goal. Another 29% of residential and 14% of community group attendees liked it. Only 3% of residential disliked it and 0% of community attendees said that they dislike or hate it.



Q2 - SMUD has a goal to completely eliminate greenhouse gas emissions from the production of our electricity by 2030. How do you personally feel about SMUD's Zero Carbon goal? (Residential n=284, Community groups n=43)

How SMUD supports the community

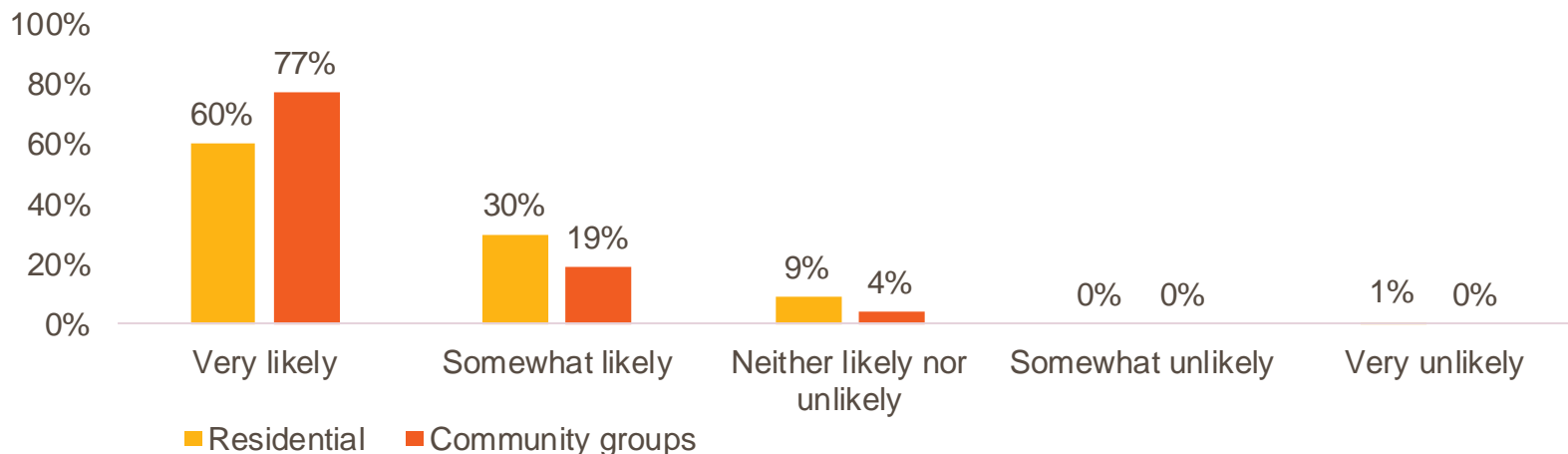
Attendees ranked their top 3 areas for how SMUD should support the community and the most frequently selected as most important (rank #1) were:

1	SMUD provides affordable electricity options
2	SMUD provides reliable electricity
3	Achieve zero carbon emissions in a way that benefits all communities, including the under-served
4	SMUD eliminates greenhouse gases from its electric power supply by 2030
5	SMUD provides customer options for local clean energy
6	SMUD being a global leader in the fight against climate change
7	SMUD actively supports the growth of business/economy in the Sacramento region
8	Economic prosperity in the Sacramento region

Q5 - Among the following, which are most important to you in regard to how SMUD supports the community? Please select your top 3. (n=284)

Willingness to partner with SMUD

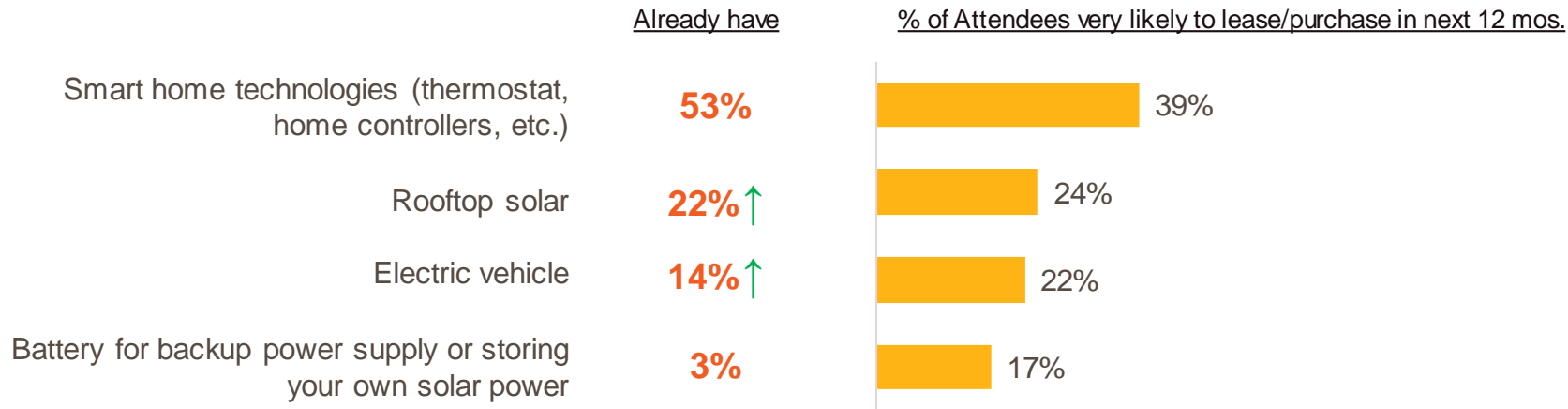
In general, 60% of residential and 77% of community group attendees indicated that they are **very willing to partner with SMUD** by personally taking action to reduce Sacramento greenhouse gas emissions (carbon)



Q7 - How willing are you to partner with SMUD to personally take action to reduce Sacramento region greenhouse gas emissions?
(Residential n=284, Community groups n=43)

Residential attendees' likelihood to lease/purchase tech

39% of residential attendees say they are very likely to purchase smart home technologies in the next 12 months. Almost one-fourth are very likely to purchase/lease rooftop solar or EVs, while slightly fewer (17%) are very likely to purchase/lease a battery.



↑ % higher than SMUD customers overall

Q9 - How likely or unlikely are you to lease/purchase the following technologies in the next 12 months? (n=284)

Attendees willingness to pay more

- 24% (68 respondents) are not willing to pay any more per month
- Almost half (49%) are willing to pay up to \$10 more per month
 - 23% (64 respondents) are willing to pay between \$1 to \$5 more per month
 - 26% (74 respondents) are willing to pay between \$6 to \$10 more per month
- Attendees tended to select dollar amounts in alignment with cash denominations, which is consistent with other pricing marketing research
- Further price sensitivity research will provide more projectable estimates

Q13 - How much more per month would you be willing to voluntarily pay to support SMUD's Zero Carbon goal? (n=284)

Residential attendee likelihood to partner

Almost 6 of 10 respondents claimed they are very likely to respond to tips from SMUD to reduce their GHG emissions. 43% said they are very likely to participate in a Demand Response program and 30% to replace their gas appliances with electric. Interestingly, younger customers (<55 yrs.) were significantly more likely than older customers (55 yrs.+) to say they are very likely to participate in programs (51% vs. 36%) and replace gas appliances with electric (36% vs. 24%).

