
MEEIA III
Commercial HVAC Contractor
Customer Research

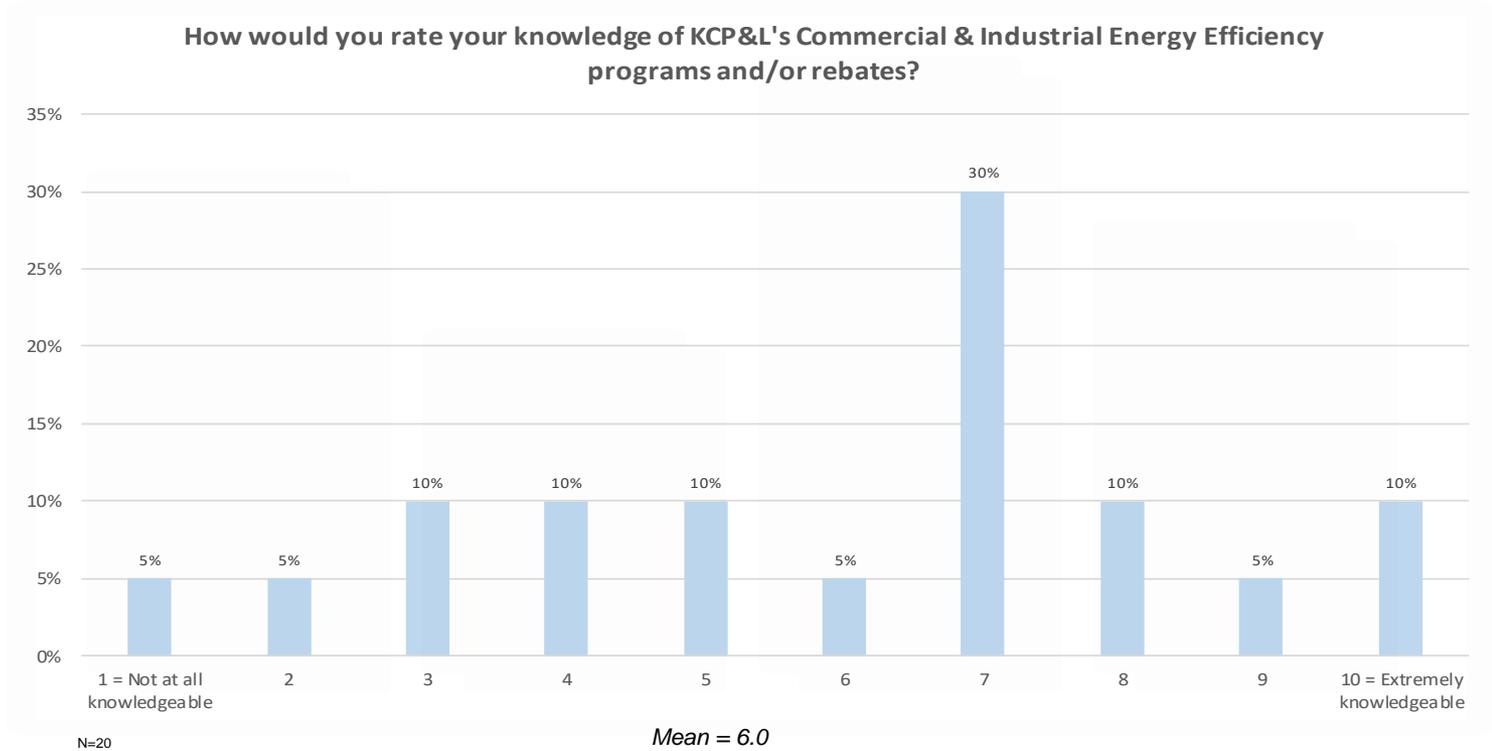
December 2017



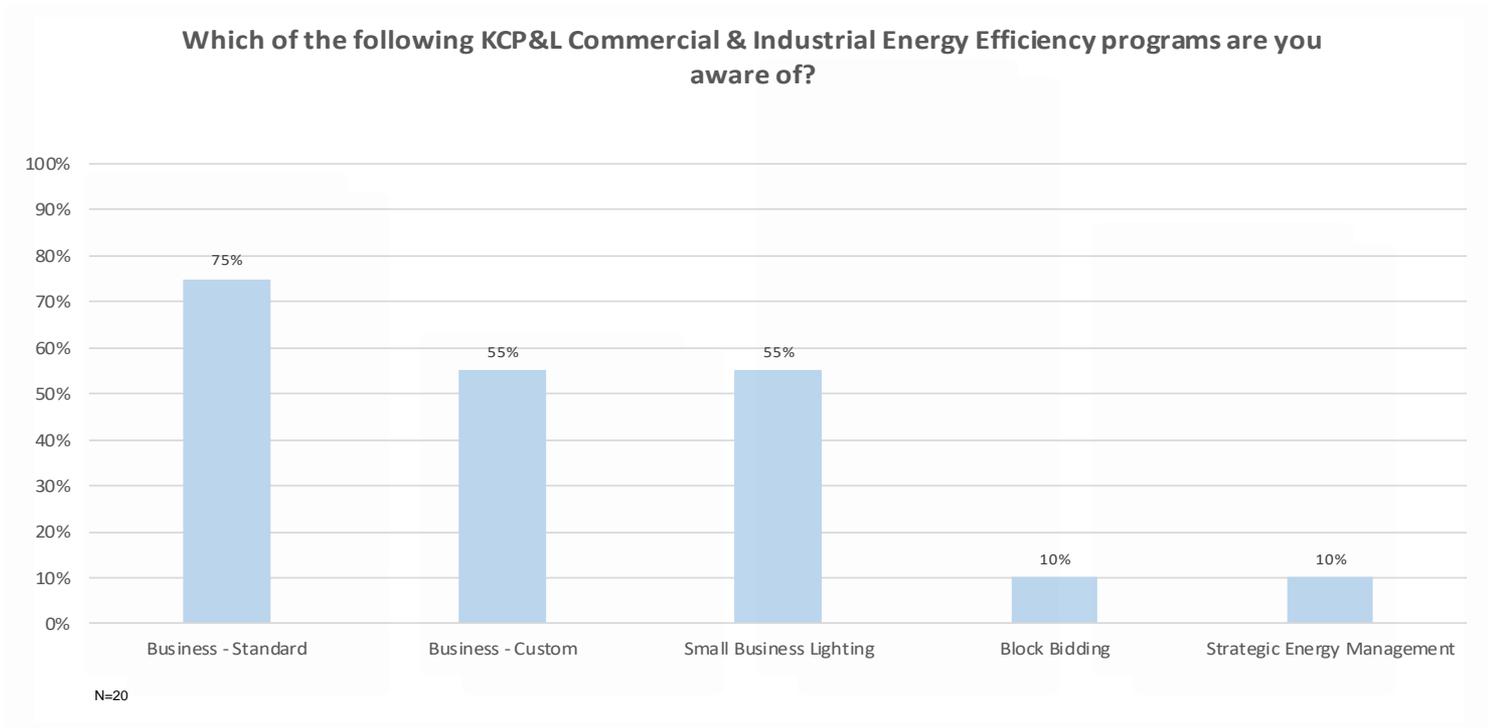
Summary of Findings

- Several Commercial HVAC Contractors appear to be frustrated with KCP&L's EE business programs and would like KCP&L to revise the programs. The most common reasons for not participating include not enough incentive, lack of understanding, programs are too complicated, takes too long or doesn't go through. Contractor quote: *"They are too complicated, not consistent in all parts of KCP&L and do not cover costs and needs to work for the end user/contractors. We would love to sit down with KCP&L to make a plan that works at the point of sale with Contractors."* I would suggest that the program manager meets with a 2-3 key contractors to discuss how each program could be revised to work better for everyone.
- Some contractors feel that point of sale mark down would increase participation in KCP&L's programs
- Three out of four contractors feel that the minimum percentage of incremental costs that needs to be covered to influence high efficiency purchase would be between 11% and 30%
- Most commercial HVAC Contractors are not fully aware all KCP&L Energy Efficiency programs available
- Email and Training Classes are the preferred communication methods to educate HVAC contractors about KCP&L's Energy Efficiency programs
- There appears to be a disconnect between the perceptions of how the company promotes the programs and individual efforts to promote KCP&L's Energy Efficiency programs.
- Contractors feel like financing options available to customers play an important role in purchase decisions of high efficiency systems. Manufacturer discounts/sales also play a key role in the HVAC contractor recommendations.
- Most contractors would be interested in Co-branding with KCP&L

Knowledge of KCP&L's Commercial & Industrial Energy Efficiency Programs



Awareness of KCP&L's Commercial & Industrial Energy Efficiency Programs

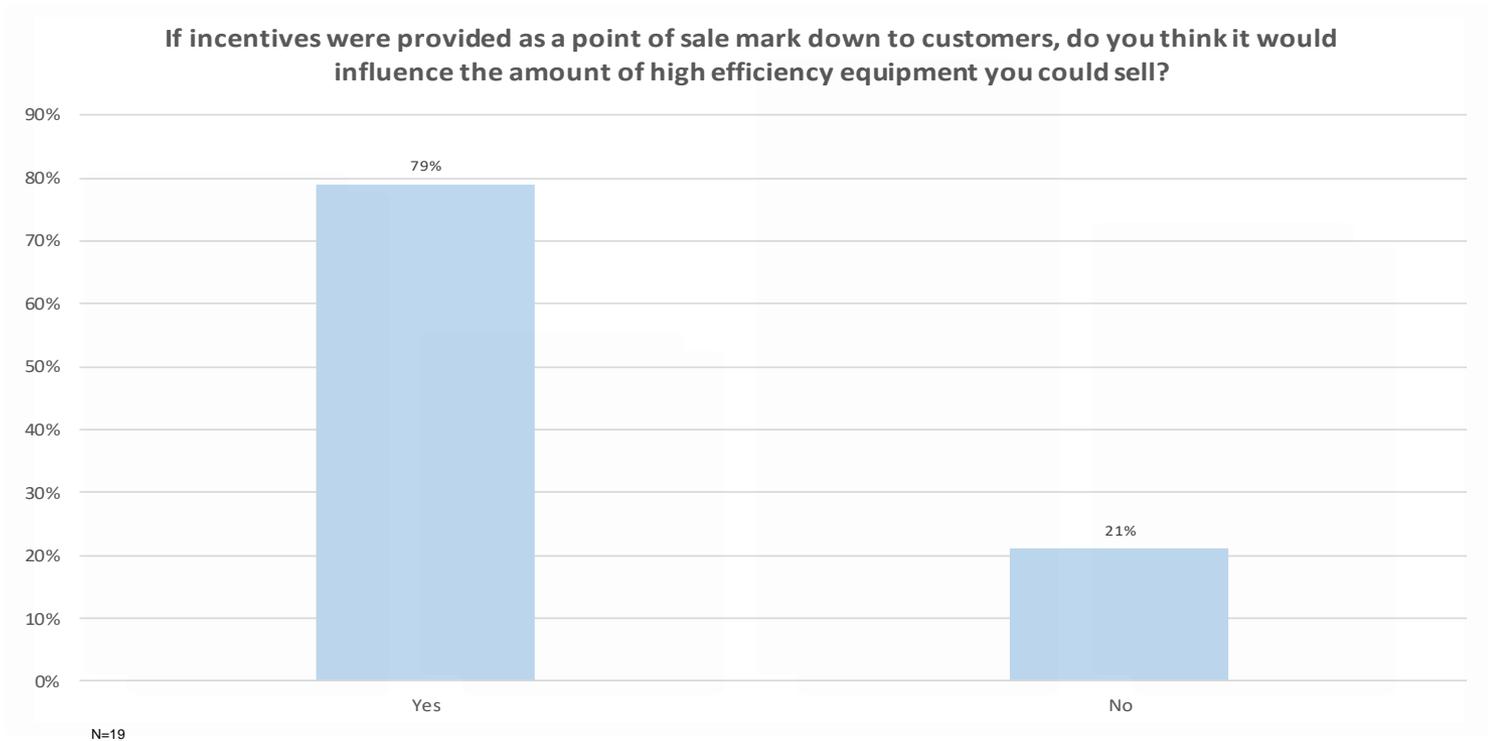


Reasons Customers Do Not Participate

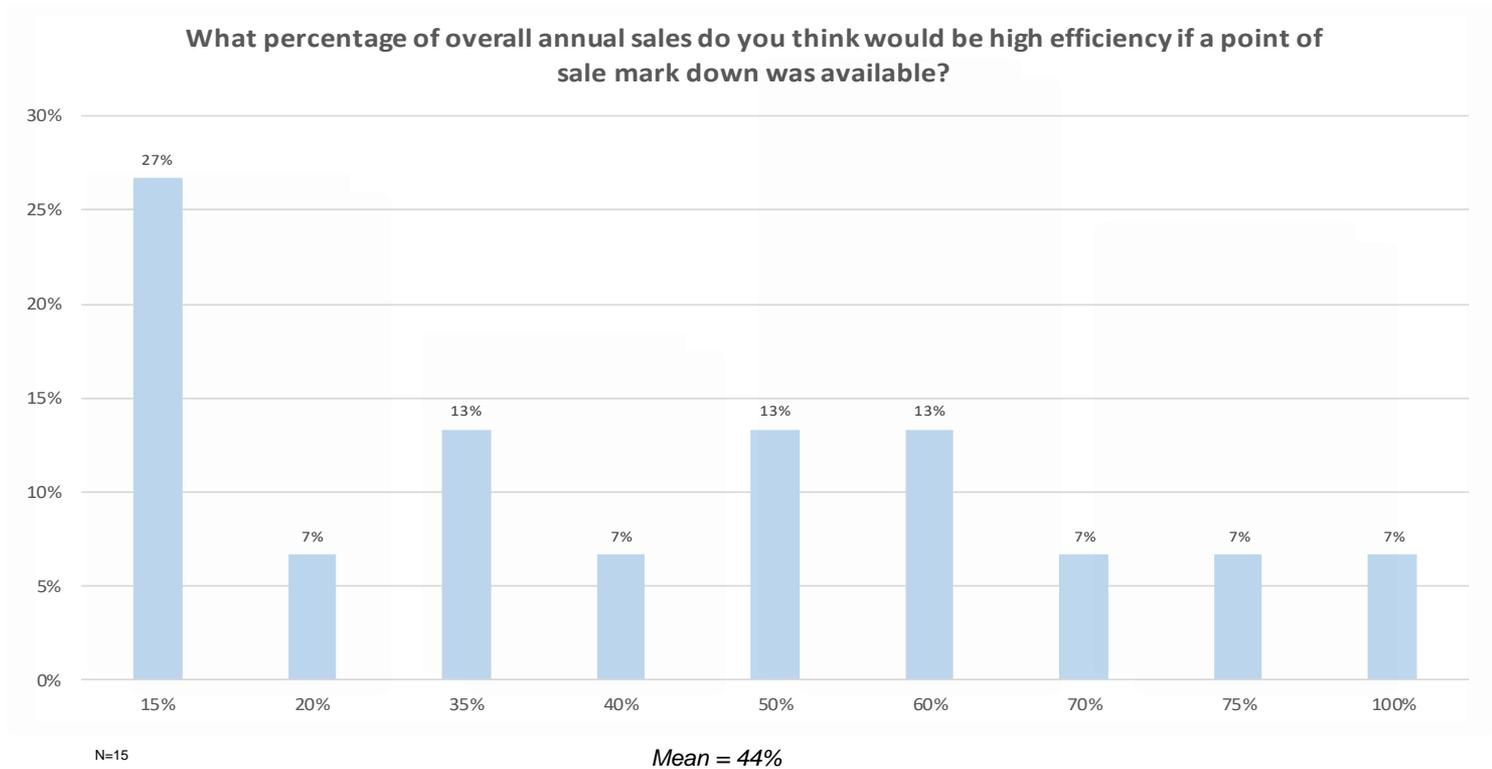
Based on your interactions with customers, what are the main reasons that a KCP&L commercial & industrial customers do NOT participate in the rebates available to them?

- *It doesn't make monetary sense to be a part of the program. Standard rebates have dropped, the breadth of standard options has decreased, and rates to stay in the program have risen. I'm unfamiliar with the LED rebates, so this is coming from an HVAC perspective. On top of this, custom rebates have become increasingly difficult to utilize and get money for. With all of this going on, code requirements for efficiency have also risen, so it has become more and more difficult to justify purchasing equipment that is eligible to earn rebate dollars because it is more efficient than required by code. Large customers pay a significant sum of money into the program that they can not possibly recoup.*
- *Lack of knowledge*
- *Rebates are limited.*
- *The initial cost of fixtures plus the labor cost. Lack of knowledge about the rebate program.*
- *They are located in Kansas.*
- *All of our customers have taken advantage of the rebates.*
- *CANNOT MIX AND MATCH FOR AHRI*
- *we don't offer them enough. The time to process and get approval on the rebate is the primary reason I do not offer. I've had situations that occur where the customer is ready to replace the unit and I mention the KCPL rebate and the next thing I know the sale doesn't go through. Most times replacement is urgent and customer wants to know cost or rebate now.*
- *They do not know about them or the owners of said commercial buildings want the cheapest up front cost which does not help them when it comes to more expensive and efficient units.*
- *time - Lack of know how - The "trade partner" are not user friendly, Just to full of them self to help me - I have over 10 that were not "done" and no rebates given. I am just disappointed in the program. Its a lighting program and about it*
- *Do not understand the details such as cost, savings, what exact steps to take.*
- *Lack of process understanding and limited time*
- *Too Complicated. Not enough incentive to make the change. Needs to happen ahead of the purchase decision not after. Need to work more directly with Distributors of products.*

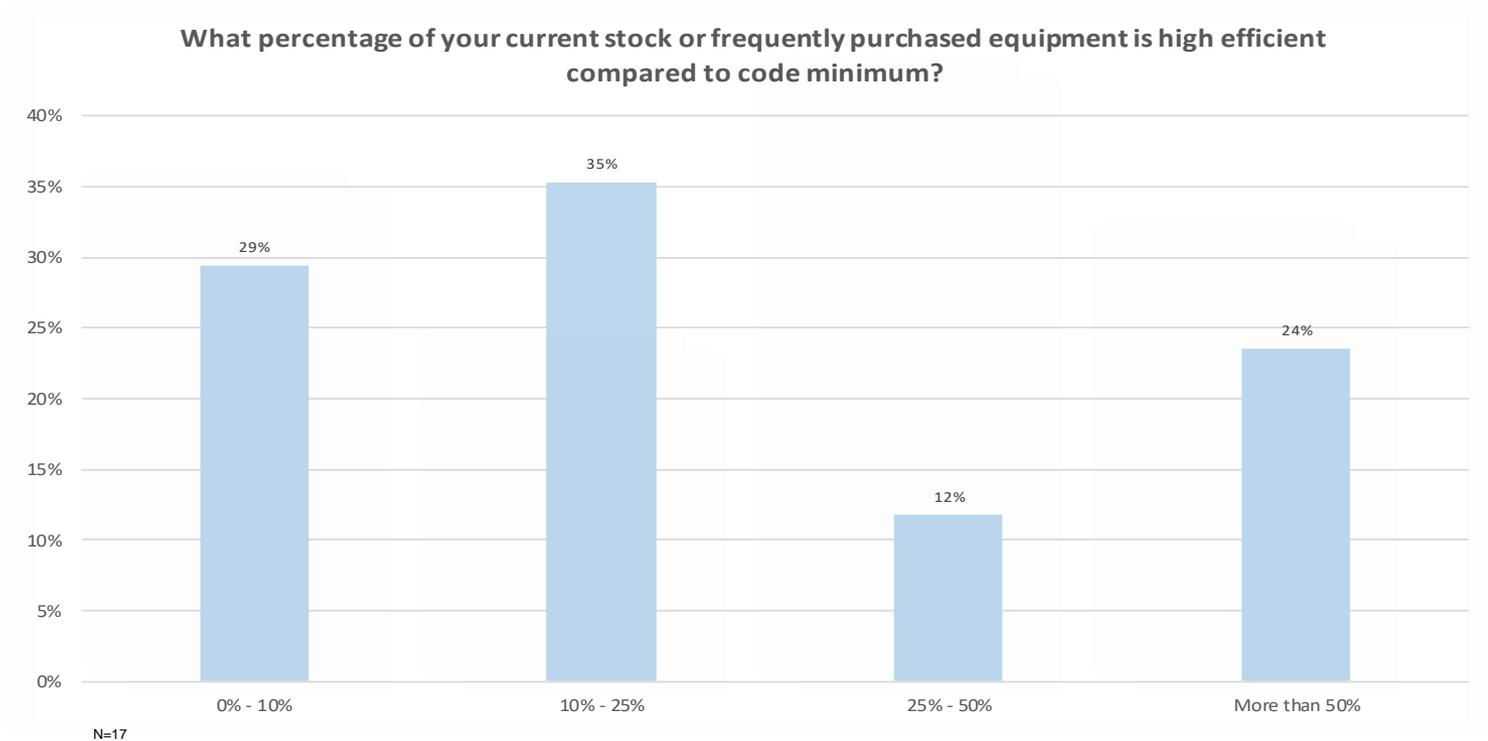
Influence of Incentives at Point of Sale



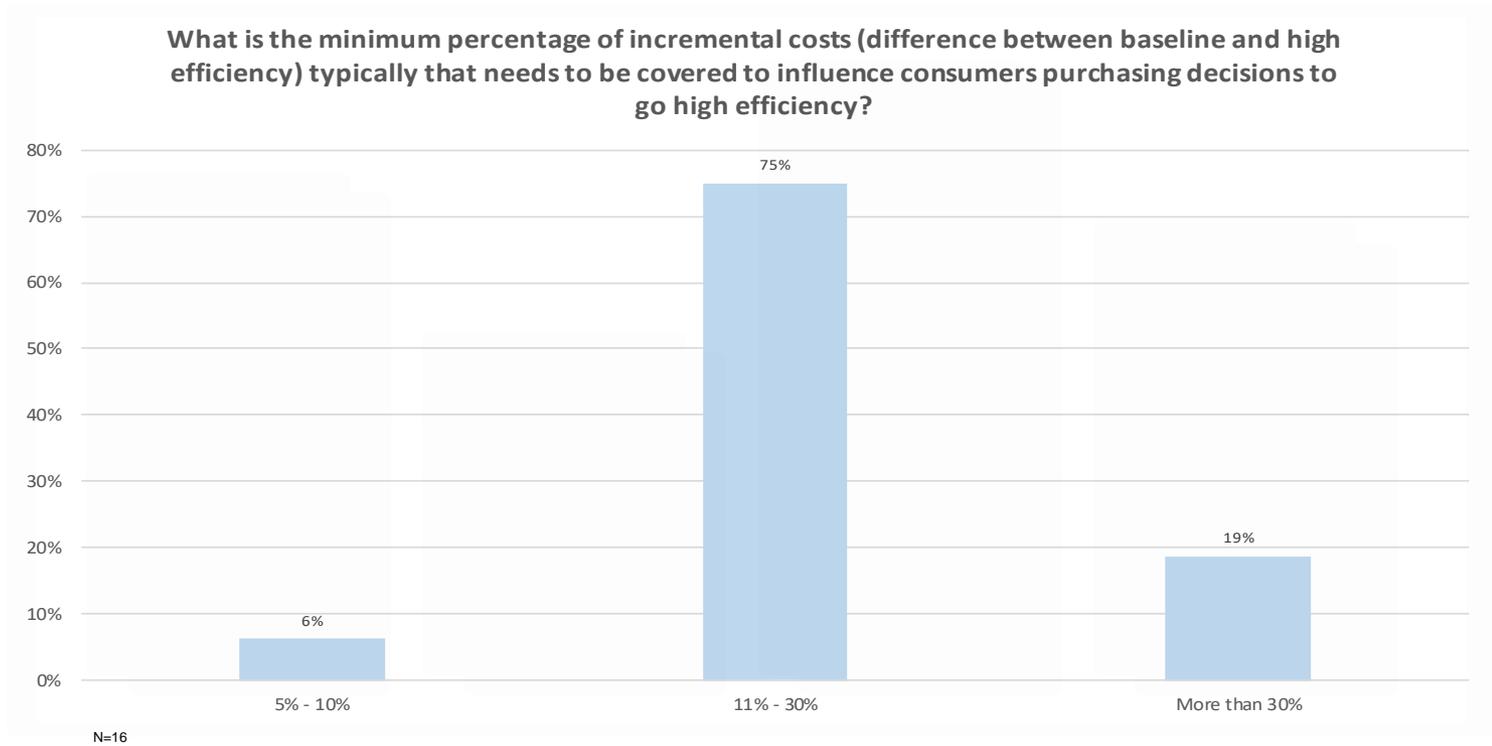
High Efficiency Sales with Point of Sale Incentive



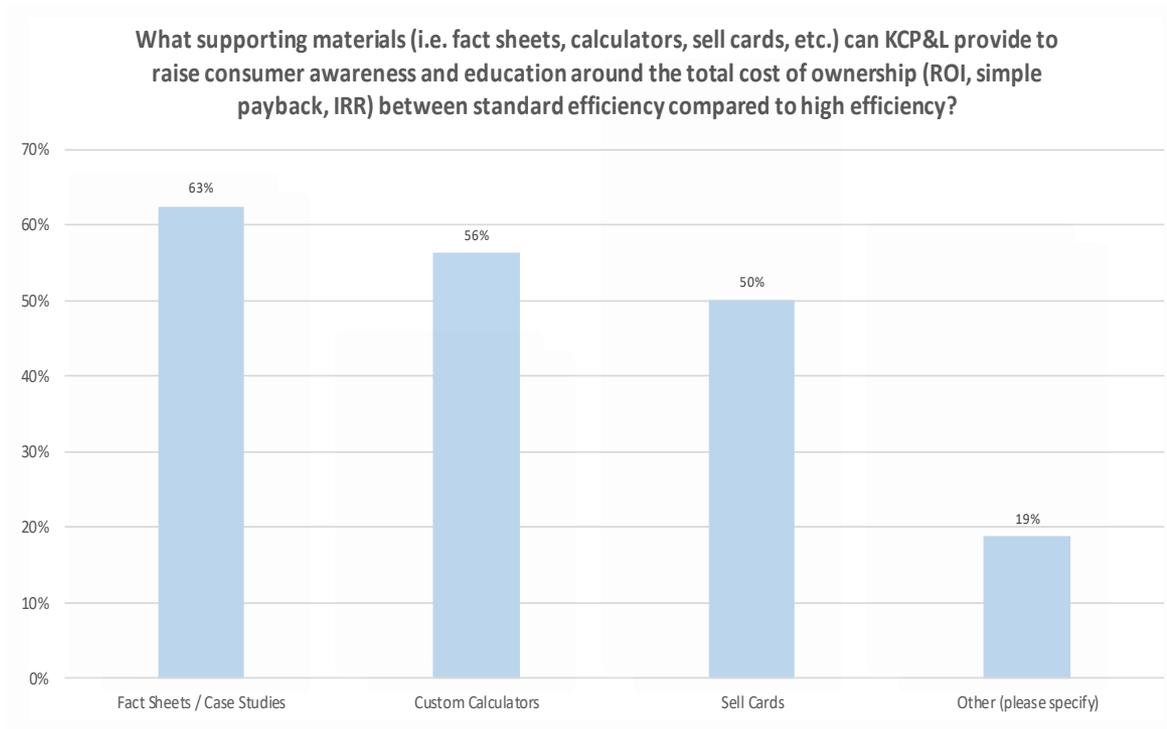
High Efficiency vs Code Minimum Inventory



Minimum Percentage of Incremental Costs to Influence Purchase Decision



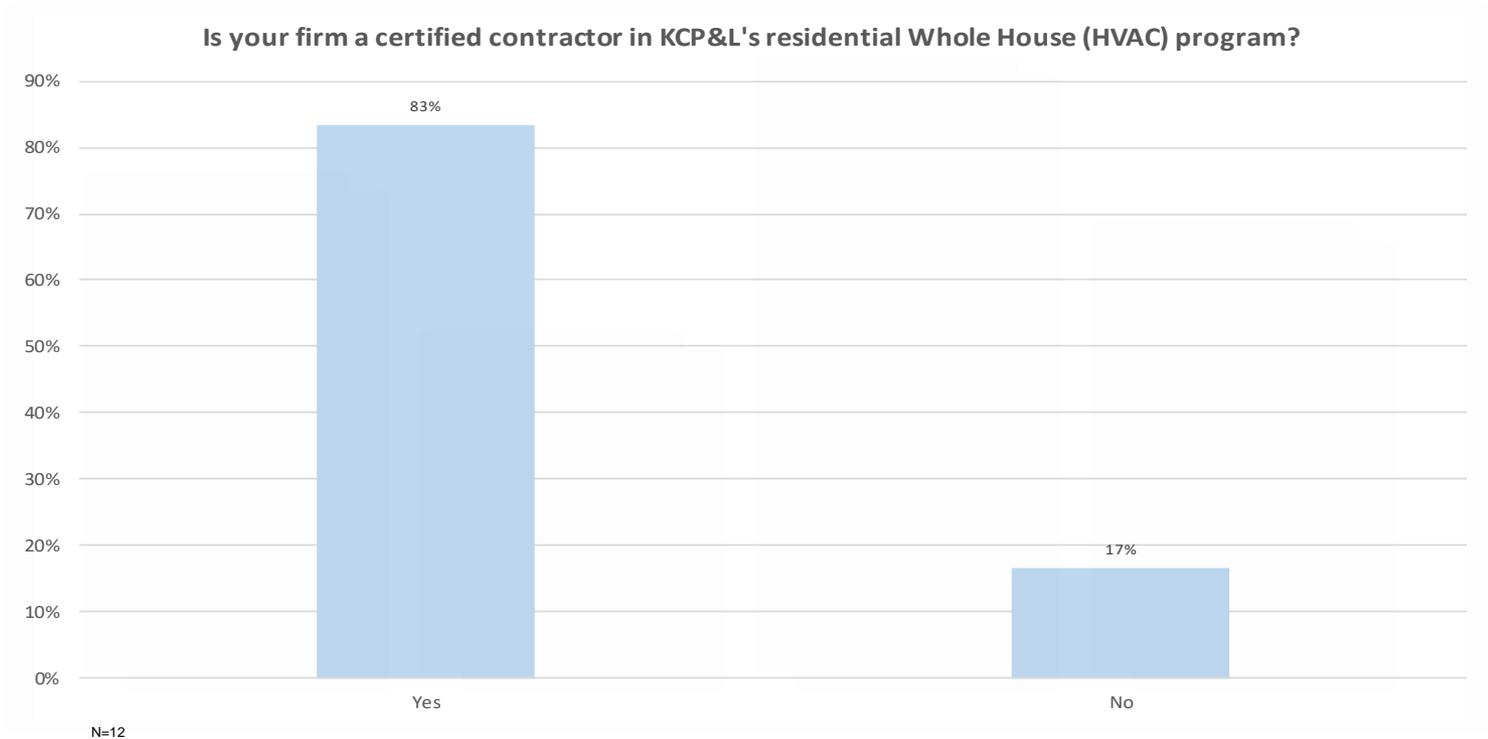
Supporting Materials Needed



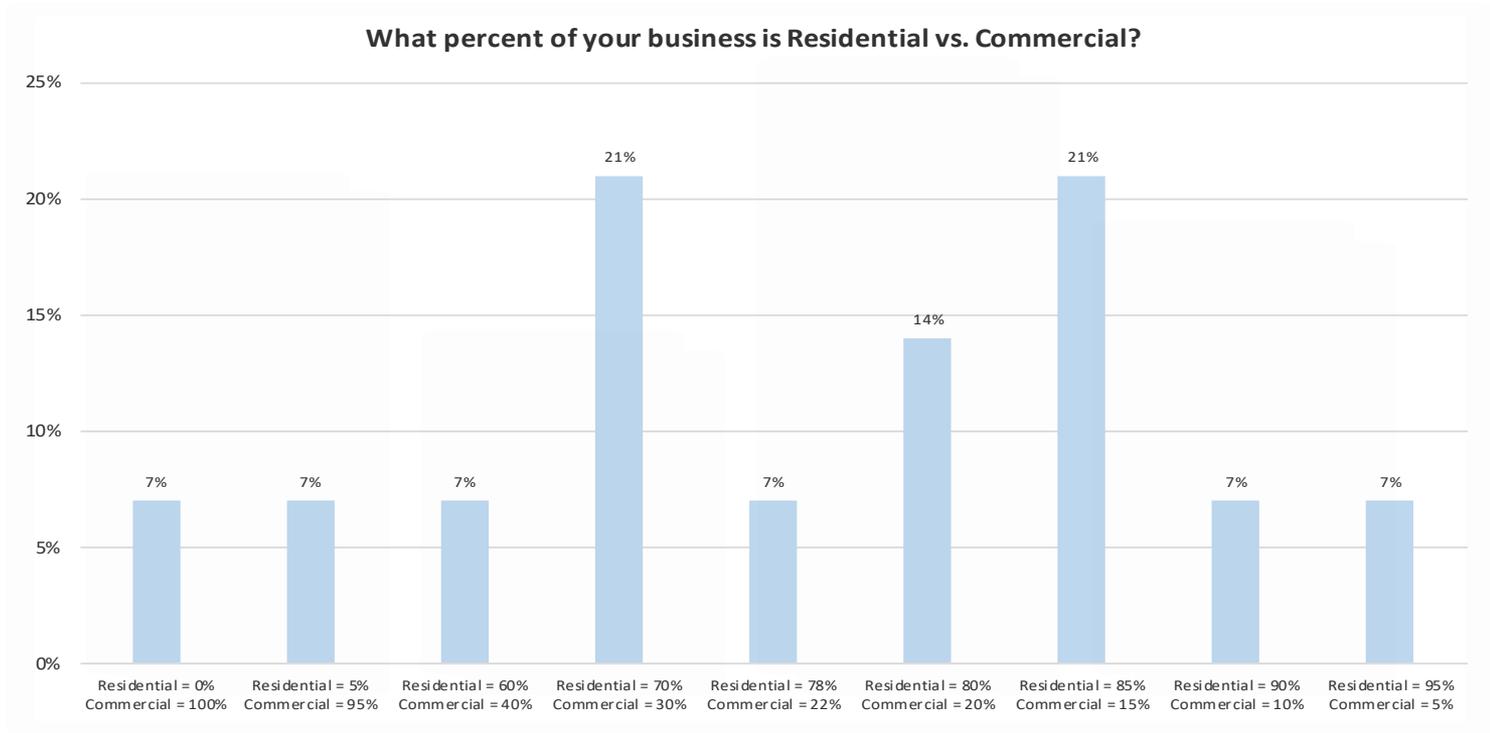
- Other (please specify):
- *More details on qualifications*
 - *Quick turn around*
 - *Has to have a good return does not make a deal just for \$50*



Certified KCP&L Contractor

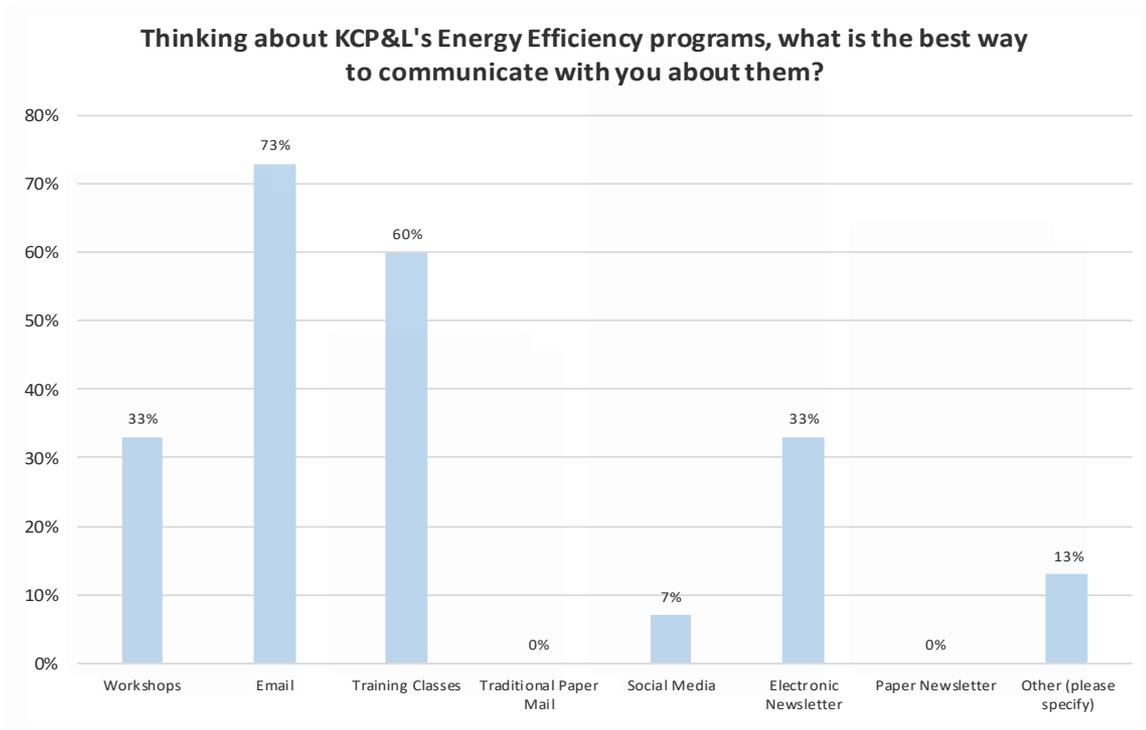


Residential vs. Commercial



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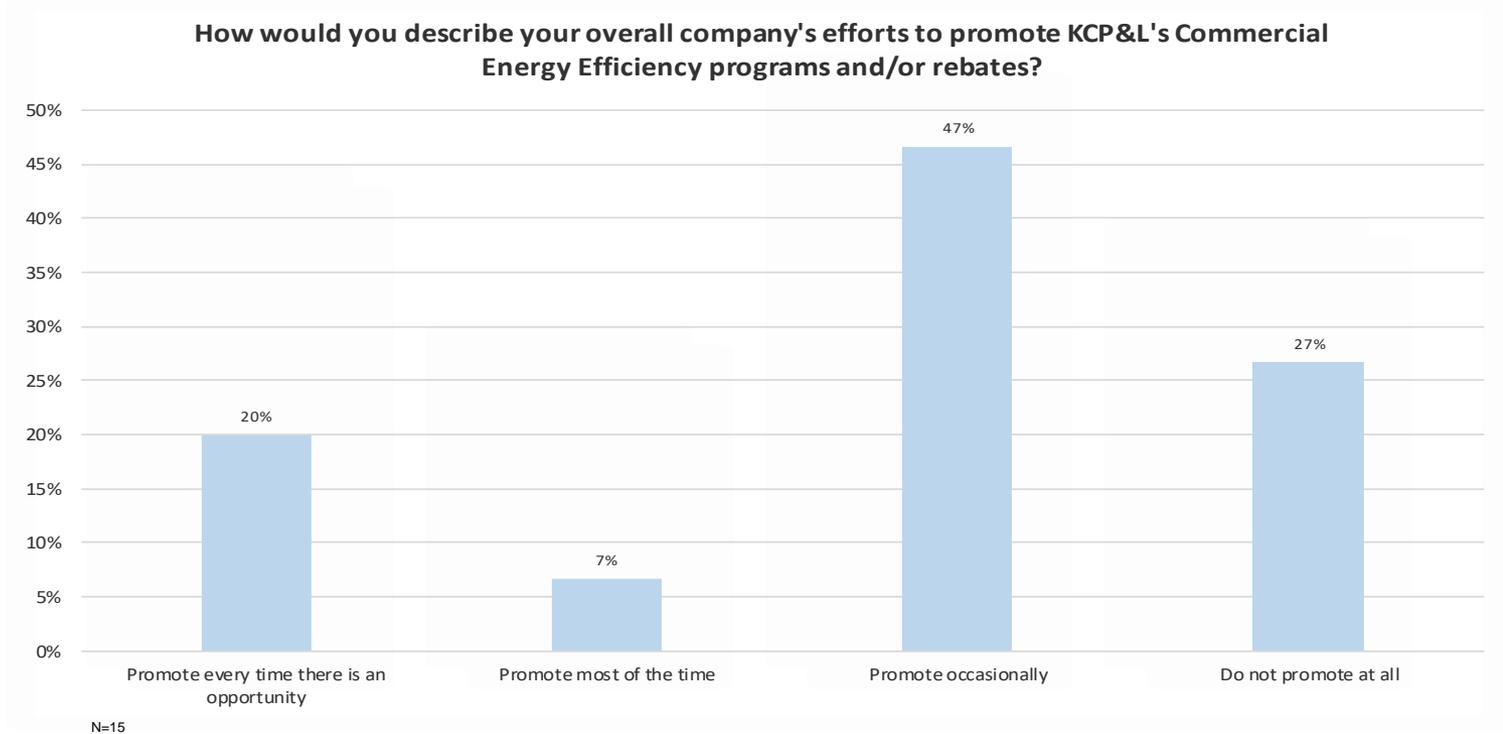
Program Communications



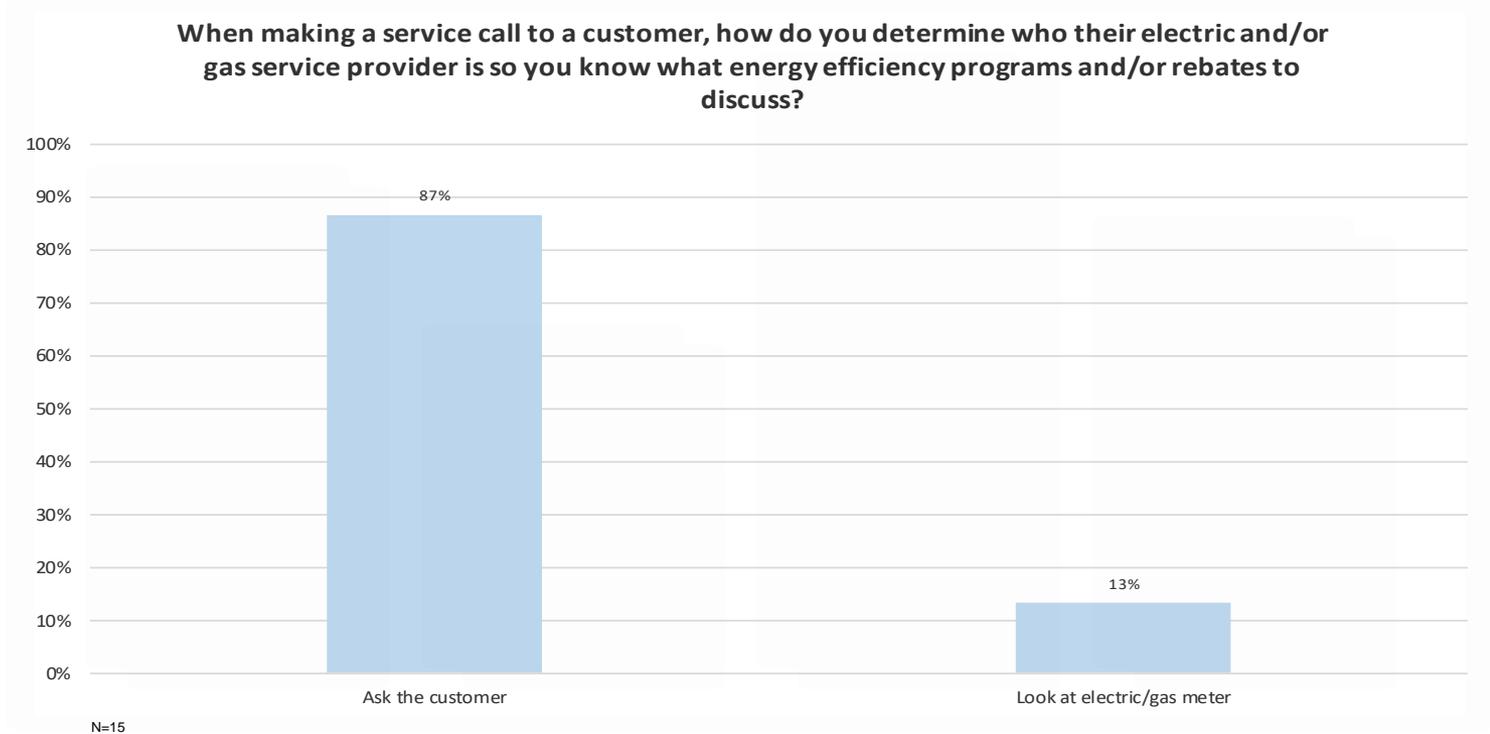
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- Other (please specify):
- Personal visit from rep
 - In Person – To drive specific results

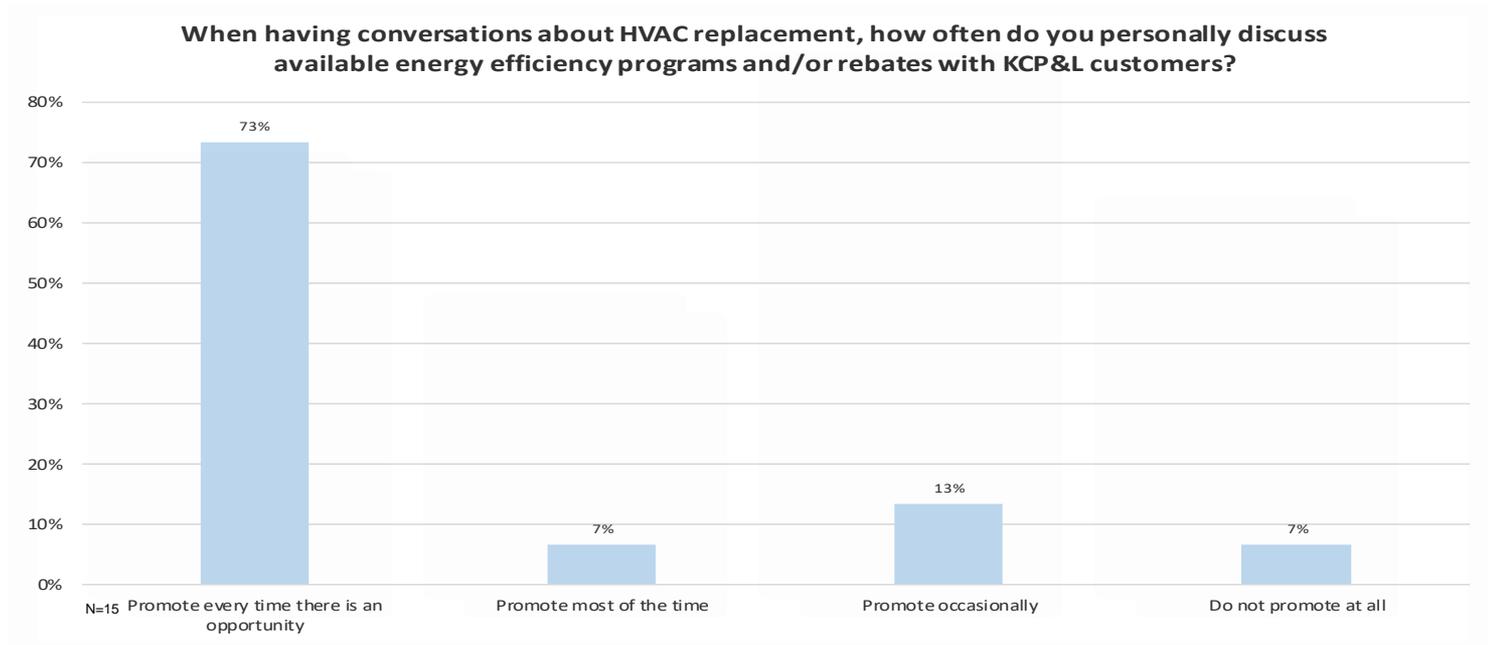
Company's Efforts to Promote KCP&L Programs



Service Provider



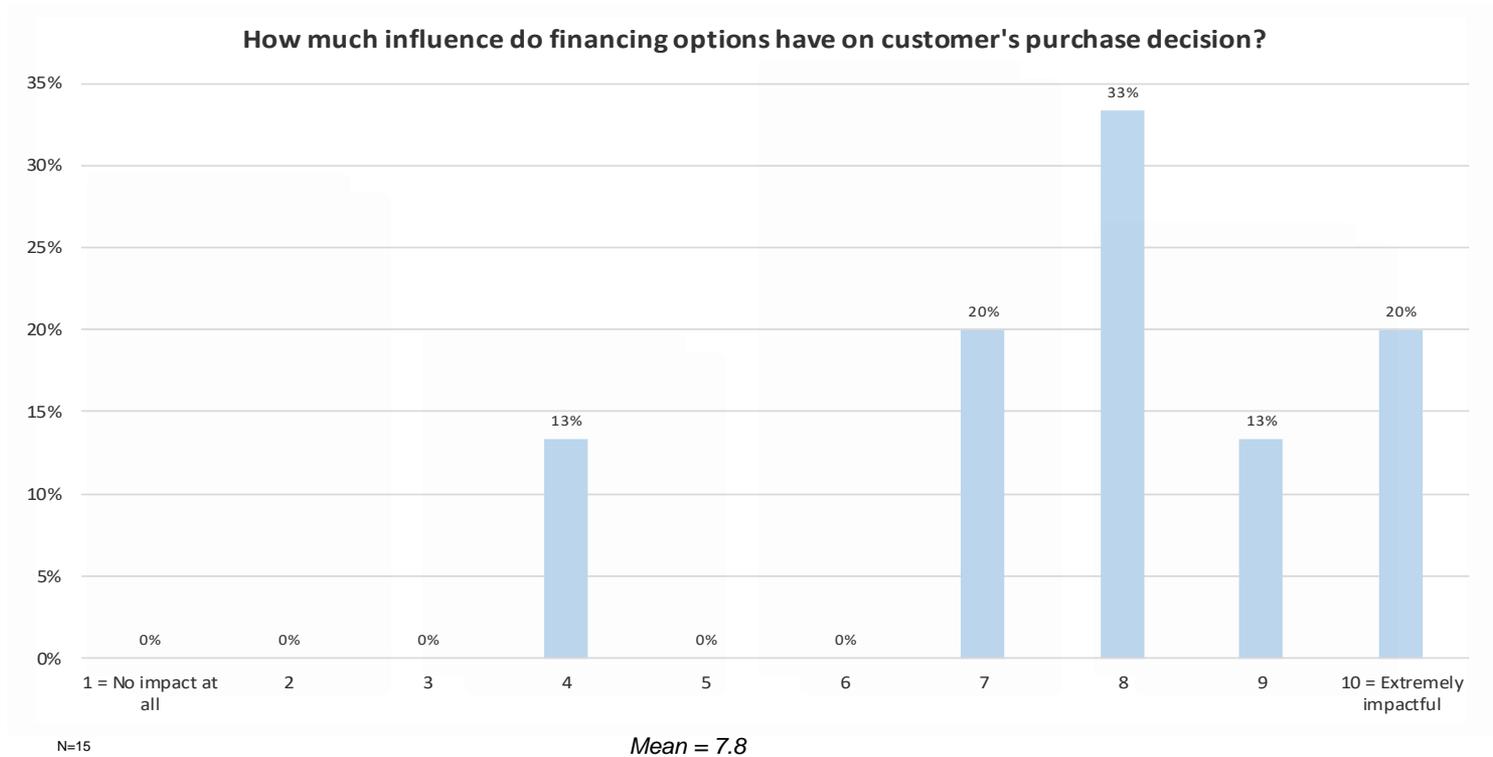
Personally Discuss KCP&L Programs with Customers



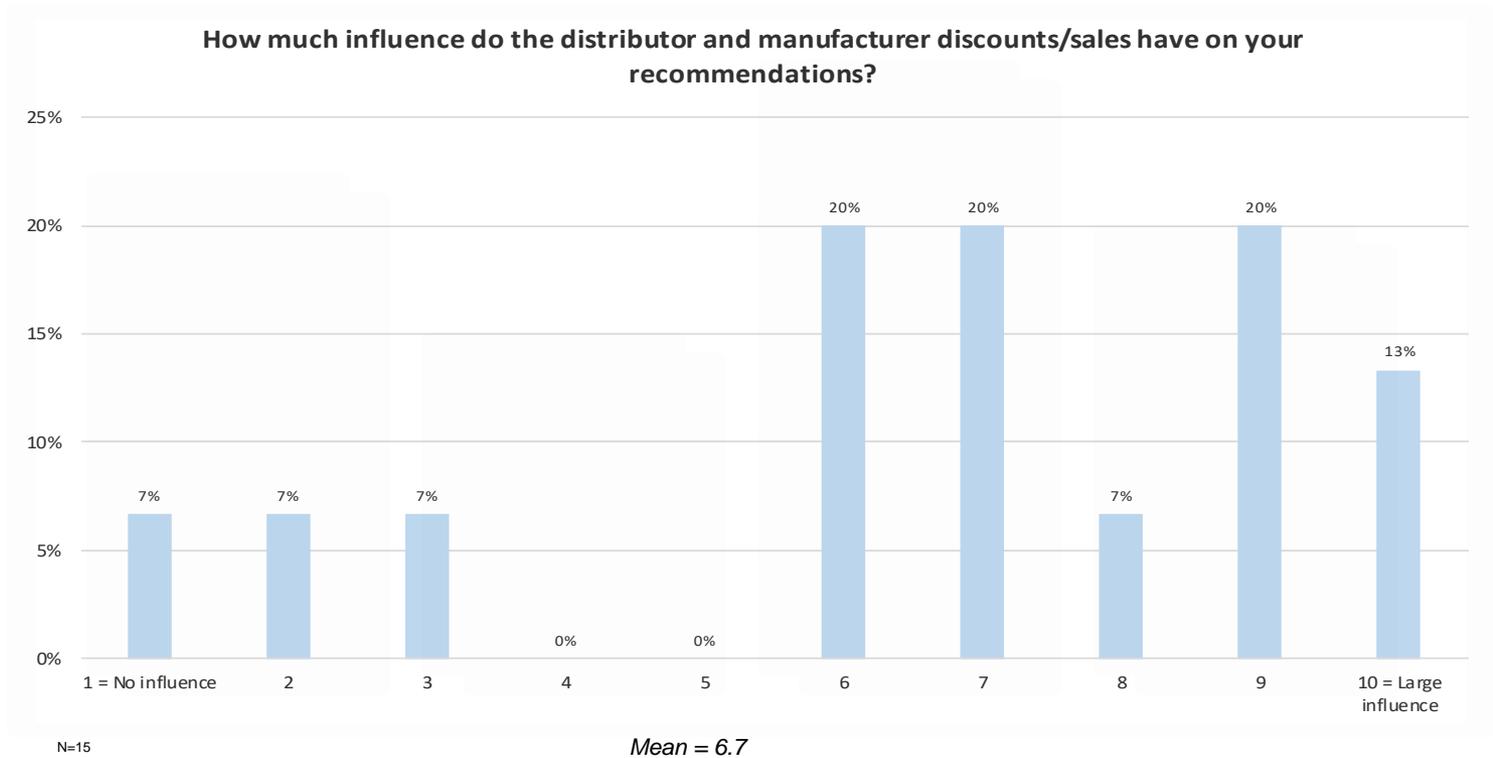
Why do you not promote KCP&L's Energy Efficiency programs every time?

- Sometimes they aren't in Missouri. I do 1st point of contact, so if I don't discuss it, the sales man who goes out will
- They are too complicated, not consistent in all parts of KCP&L and do not cover costs and needs to work for the end user/contractors. We would love to sit down with KCP&L to make a plan that works at the point of sale with Contractors.

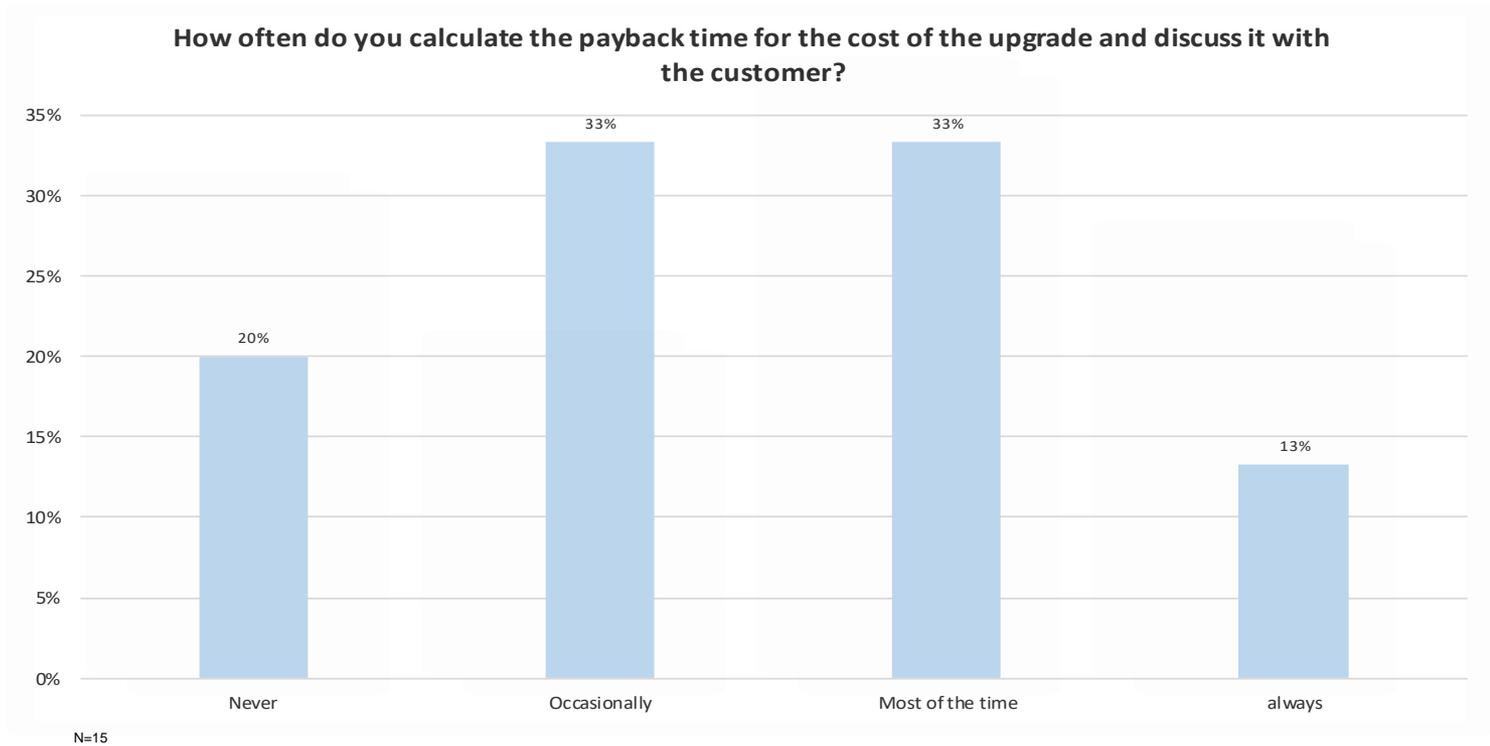
Influence of Financing Options



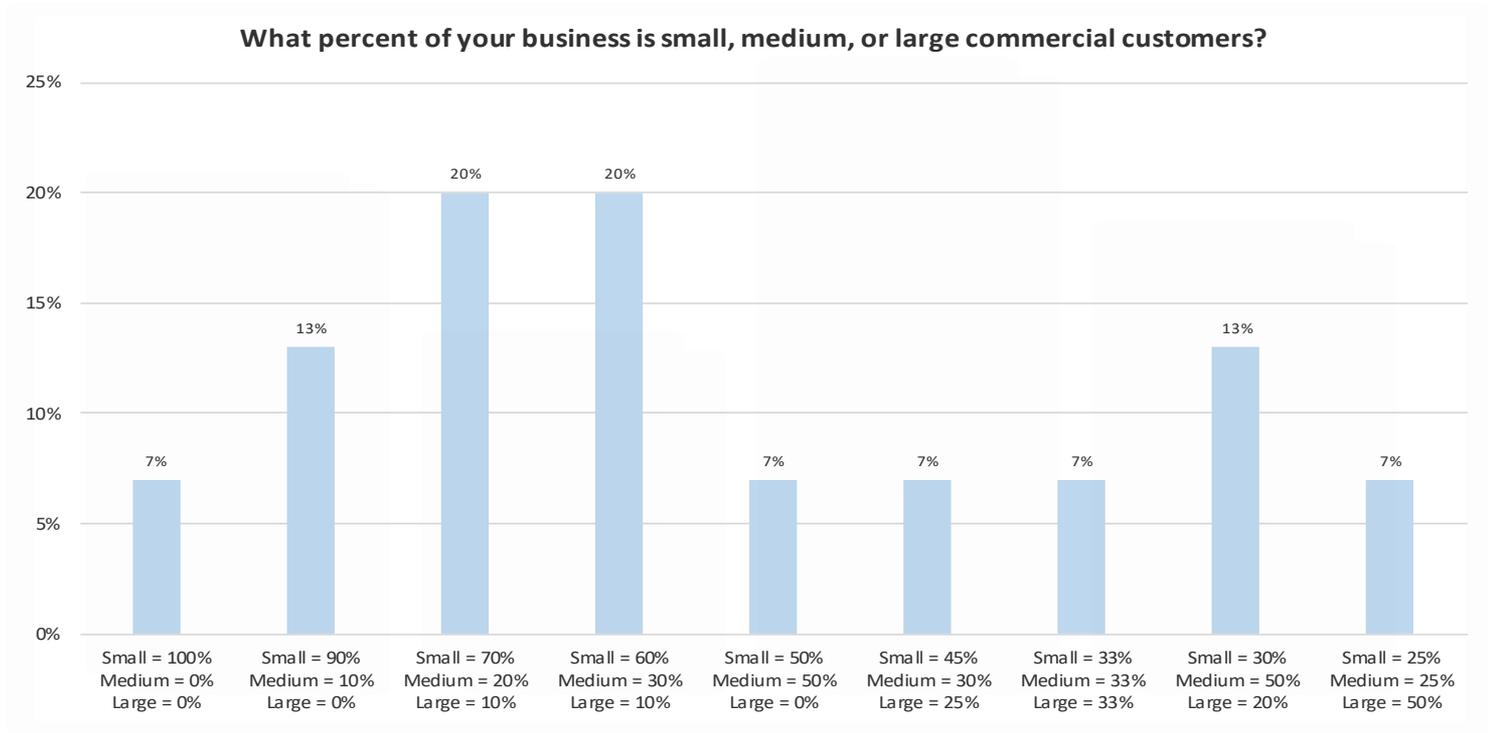
Influence of Manufacturer Discounts and Sales



Payback Calculations

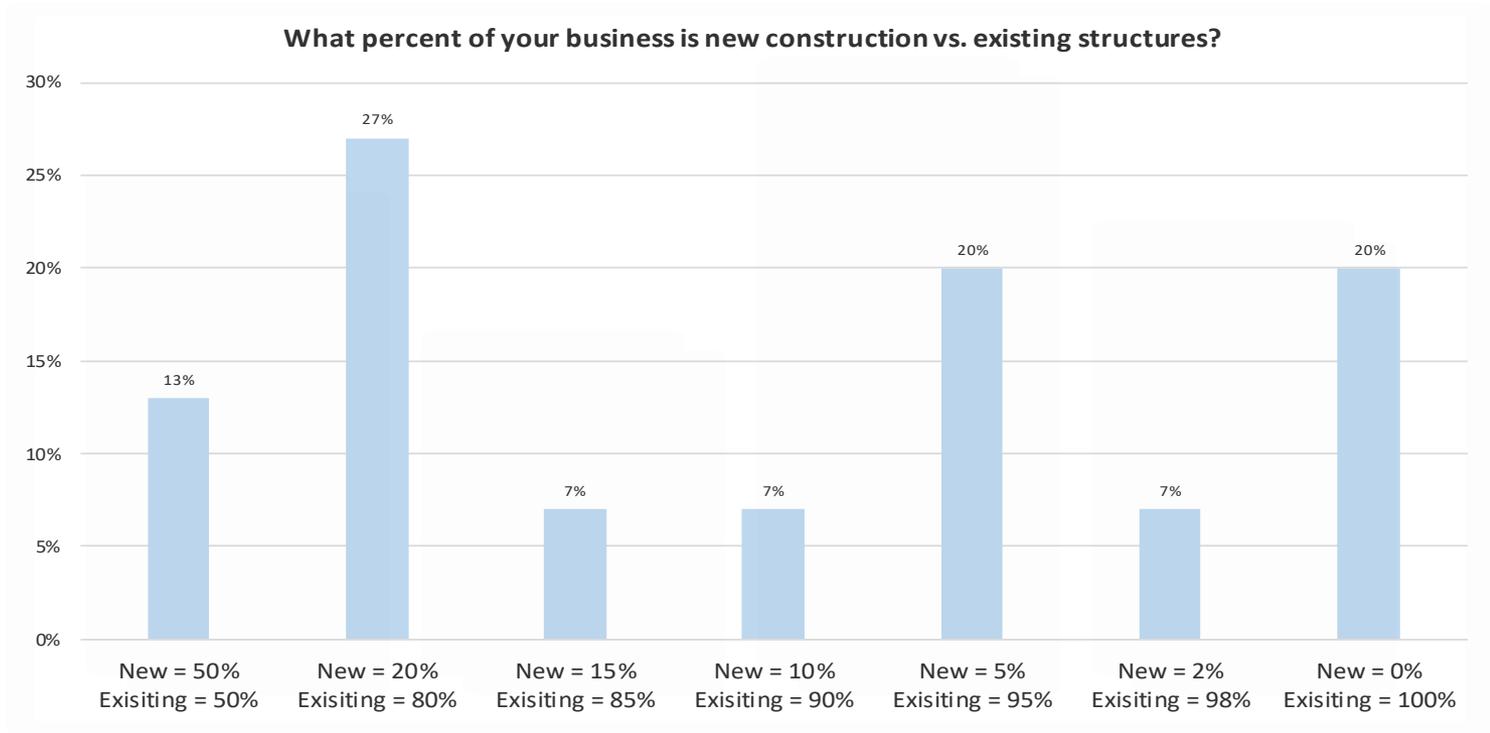


Customer Type - Size



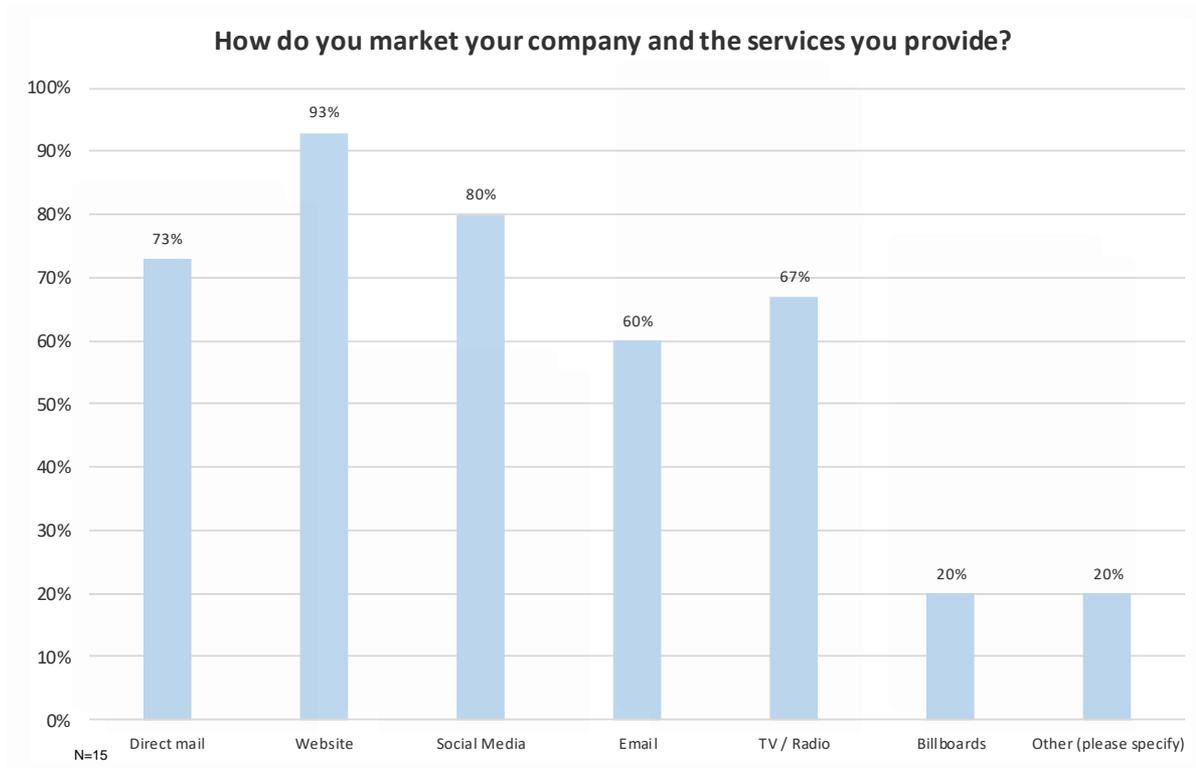
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Customer Type – New vs. Existing



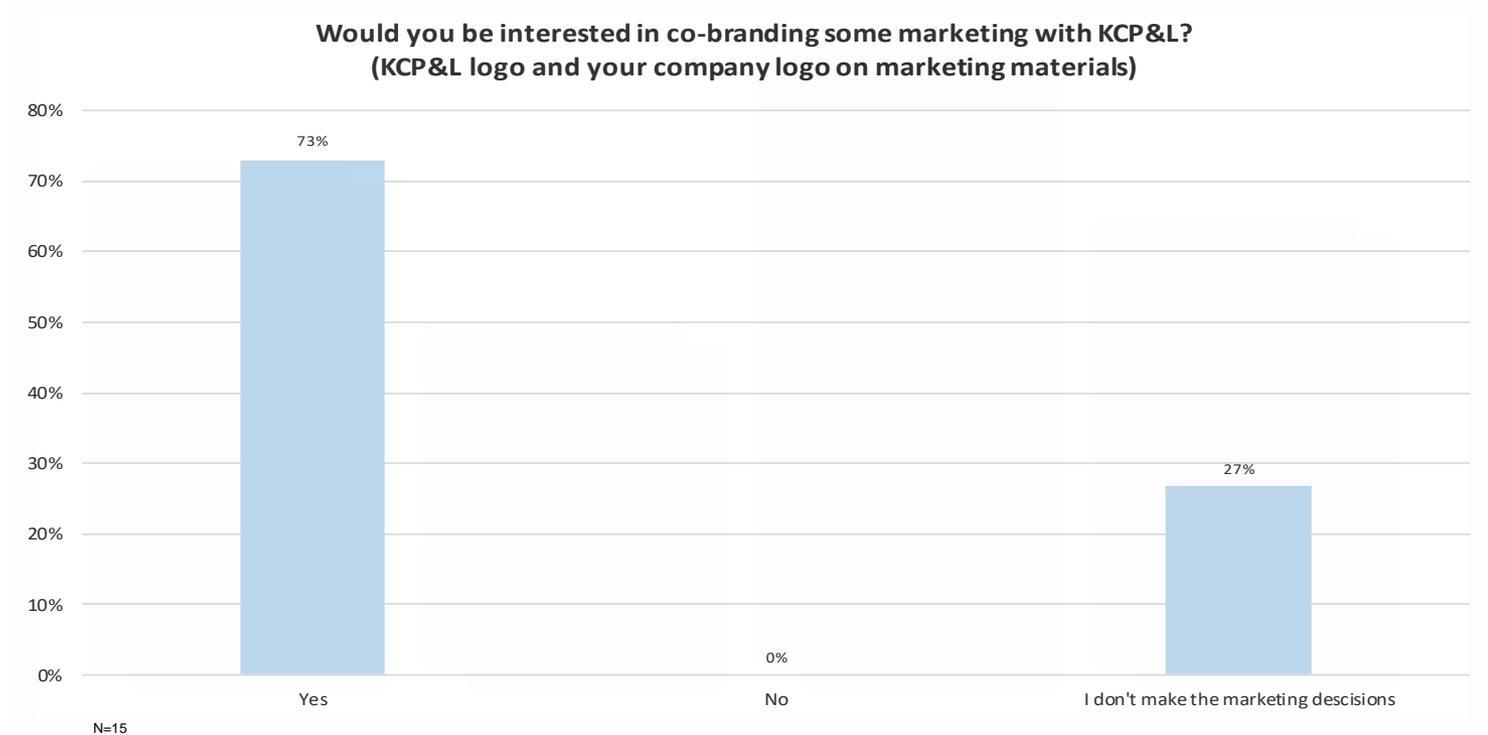
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Marketing



- Other (please specify):
- APPS and Mobile Ads
 - Postcards and letters
 - Word of mouth

Interest in Co-Branding



Program Suggestions

Is there anything missing that you think would be successful from KCP&L's programs related to energy efficiency? This could include rebates currently offered or something that is not currently being offered.

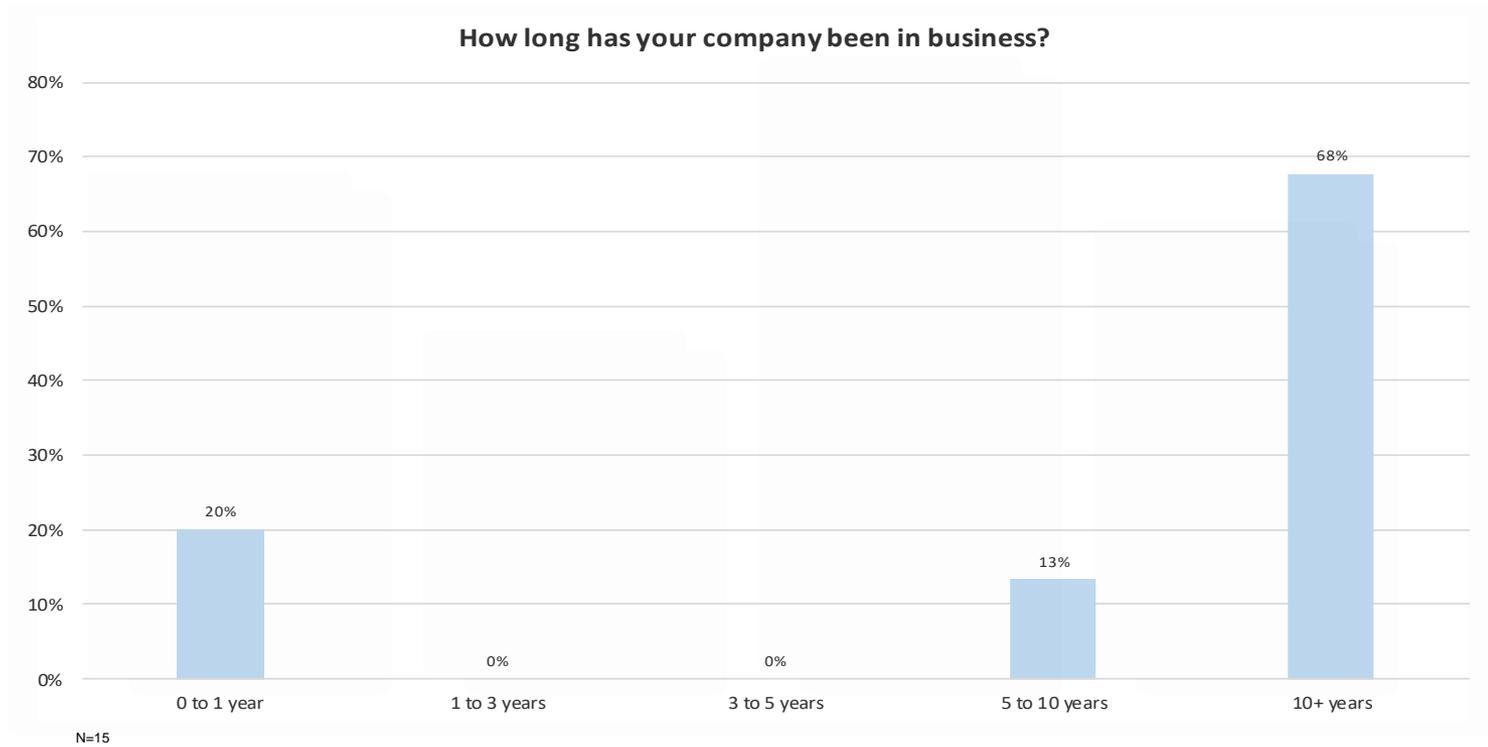
- *Many HVAC items/pieces of equipment are not covered by standard rebates.*
- *Better electric rates for heat pumps or high efficiency products*
- *Rebates that encourage better equipment and efficiency is what we want for our customers.*
- *NEED TO BE MORE OPEN WITH CUSTOMERS ON WHAT QUALIFIES FOR REBATES AND WHAT ISNT POSSIBLE. TRADE ALLY'S ARE CAUGHT BETWEEN YOUR COMPANY PEOPLE SAYING THE CUSTOMERS NEW EQUIPMENT QUALIFIES WHEN ACTUALLY IT DOESNT FOR ONE REASON OR ANOTHER. BETTER COMMUNICATION WITH YOUR STAFF ABOUT THE REBATE QUALIFICATIONS*
- *we need to better understand what is out there and how to streamline the sales process*
- *Lighting is good. Air flow and sealing is not there. Heating water is low at best*
- *Start a new and improved rebate program for solar and geothermal. Learn from the past and set up safeties and accountabilities. Should be more fair to all instead of a few benefitting and then no rebates left for everyone else.*
- *Yes, if KCP&L is interested in helping make an impact on HVAC Products they need to work more directly with Distributors of that product to make it easy. Please feel free to contact. Phillip Martin @ cfm Distributors- 816-842-5400*

Rebate Feedback

What if any feedback do you have on the rebate amounts offered by KCP&L?

- *When my customers ask me about participation in the rebate program, unless they have plans for LED retrofits or other projects to claim rebate dollars outside of HVAC, I recommend they do not participate because the payback isn't nearly high enough. So I would say the amounts don't justify/encourage participation.*
- *The rebates are not anywhere near what they once were and the sales of heat pumps definitely changed downward when they were lessened.*
- *I feel that the funds that KCP&L offer could be better used*
- *the rebate for high end commercial equipment usually doesn't justify the cost difference the customer has to pay. Again that is based off previous experience a few years ago, I am not familiar with the new program.*
- *lighting is good but others things are not worth talking about*
- *Since I fill out all the forms for the rebates, it takes a LOT of time that I don't get paid for, but I do it to help our customers and make them happy. I'd suggest part of the rebate goes to the contractor to cover admin cost.*
- *They need to make it good for either the contractor or the end user to make it viable. Payback in less than 3 years is a good target.*

Company Demographics



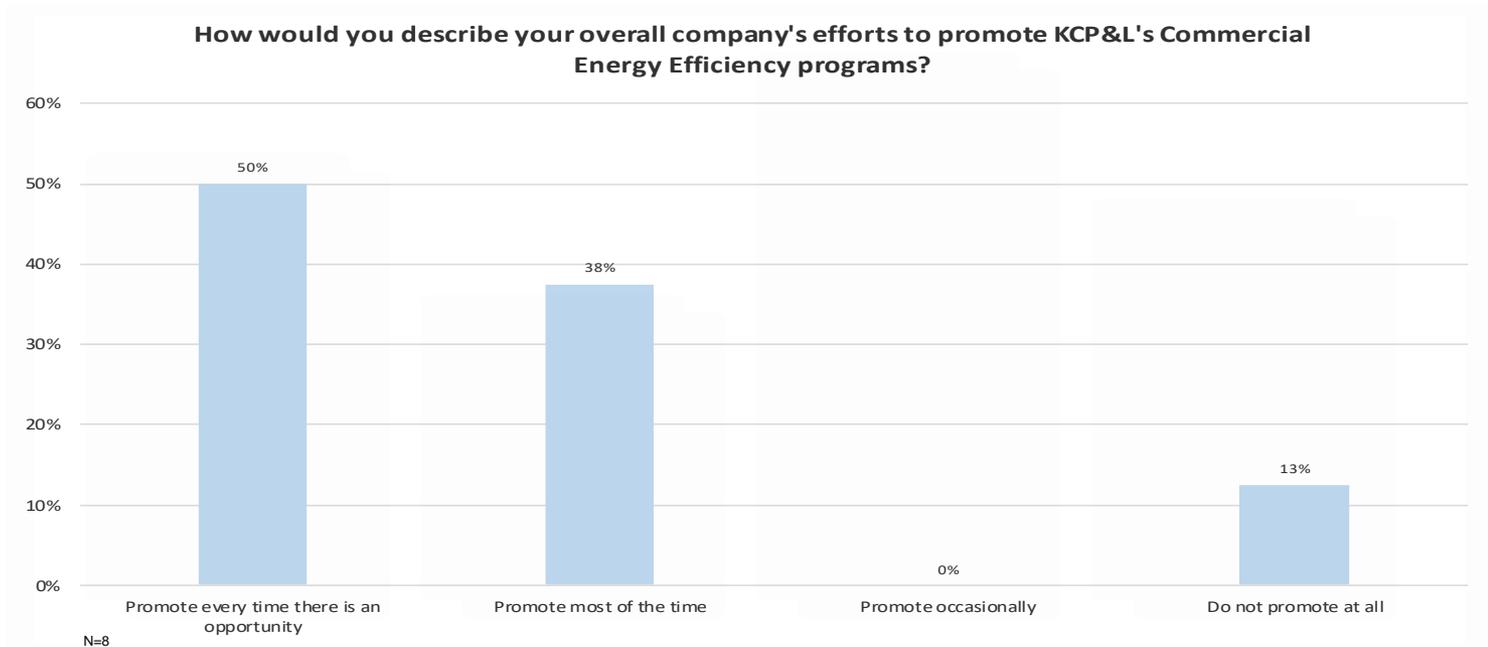
MEEIA III
Energy Auditor Trade Ally
Customer Research

December 2017

Note: Caution Small Sample Size



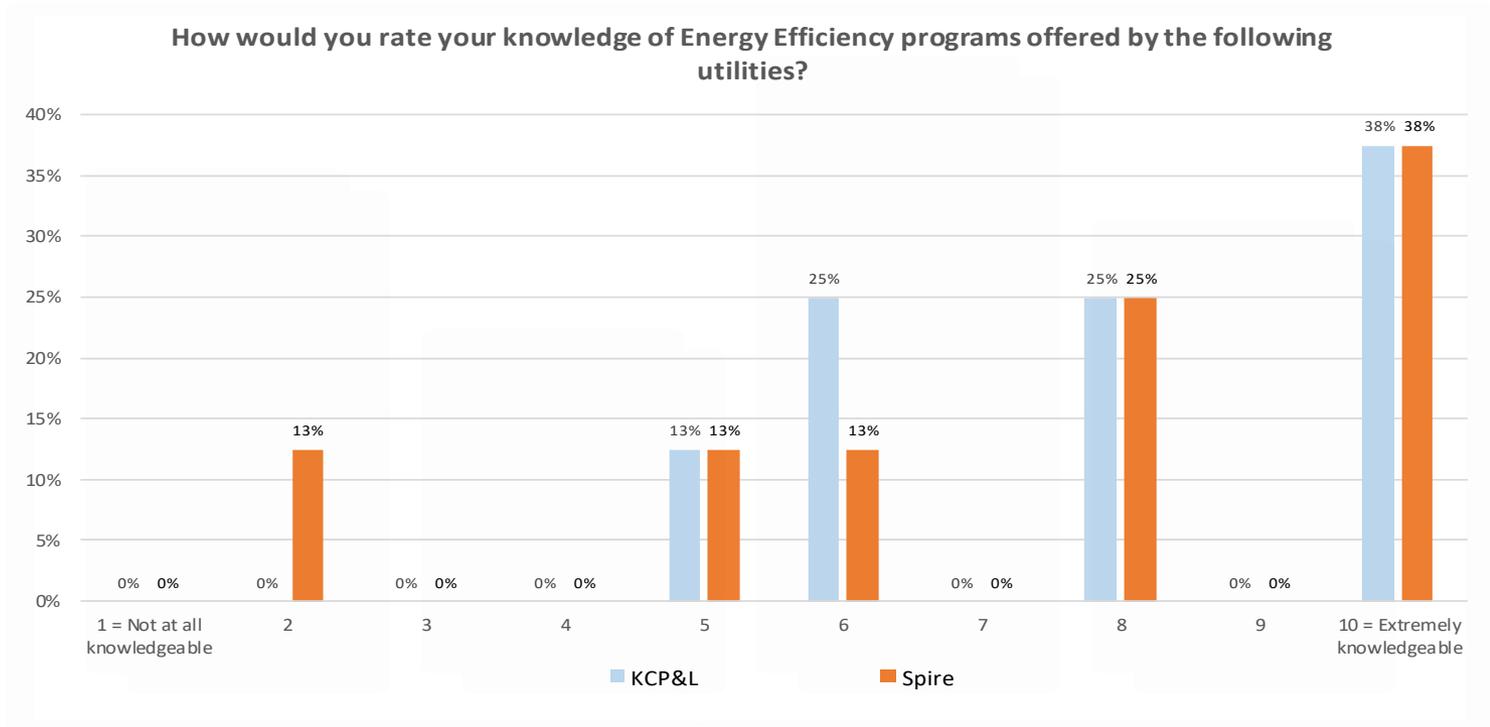
Company's Efforts to Promote KCP&L Programs



Why do you not promote KCP&L's Energy Efficiency programs more often?

- *This program does not work for independent HERS auditors*

Knowledge of KCP&L's Commercial & Industrial Energy Efficiency Programs

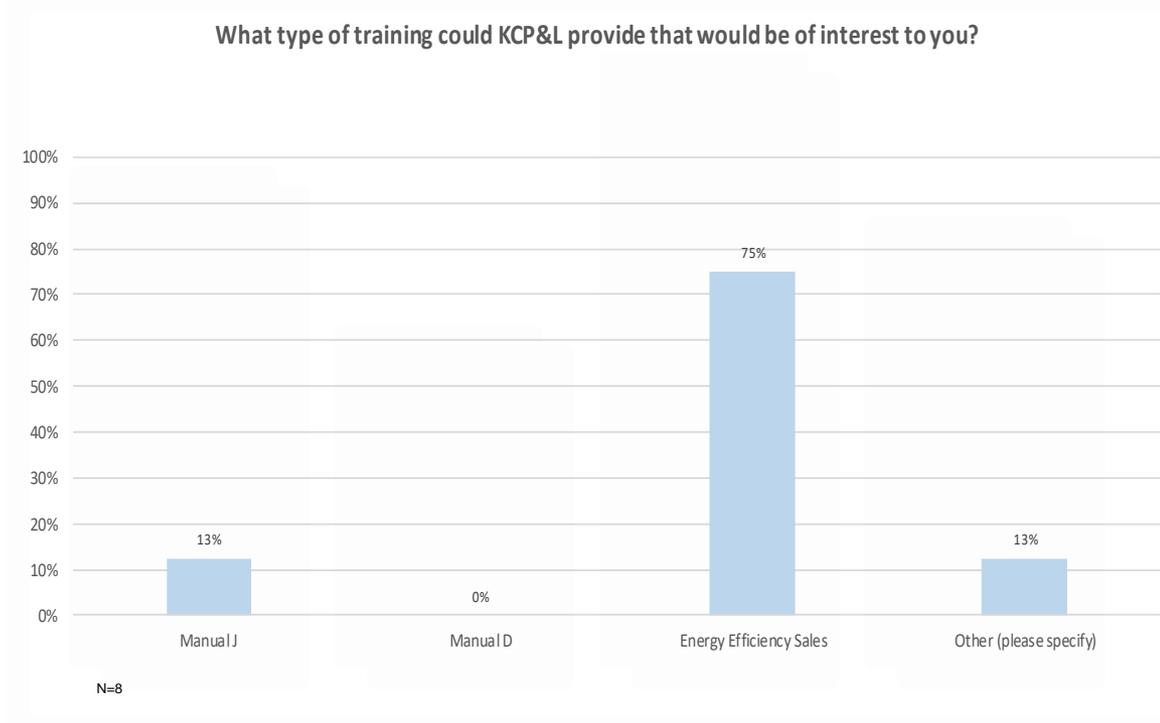


N=8

Means
 KCP&L = 7.9
 Spire = 7.4

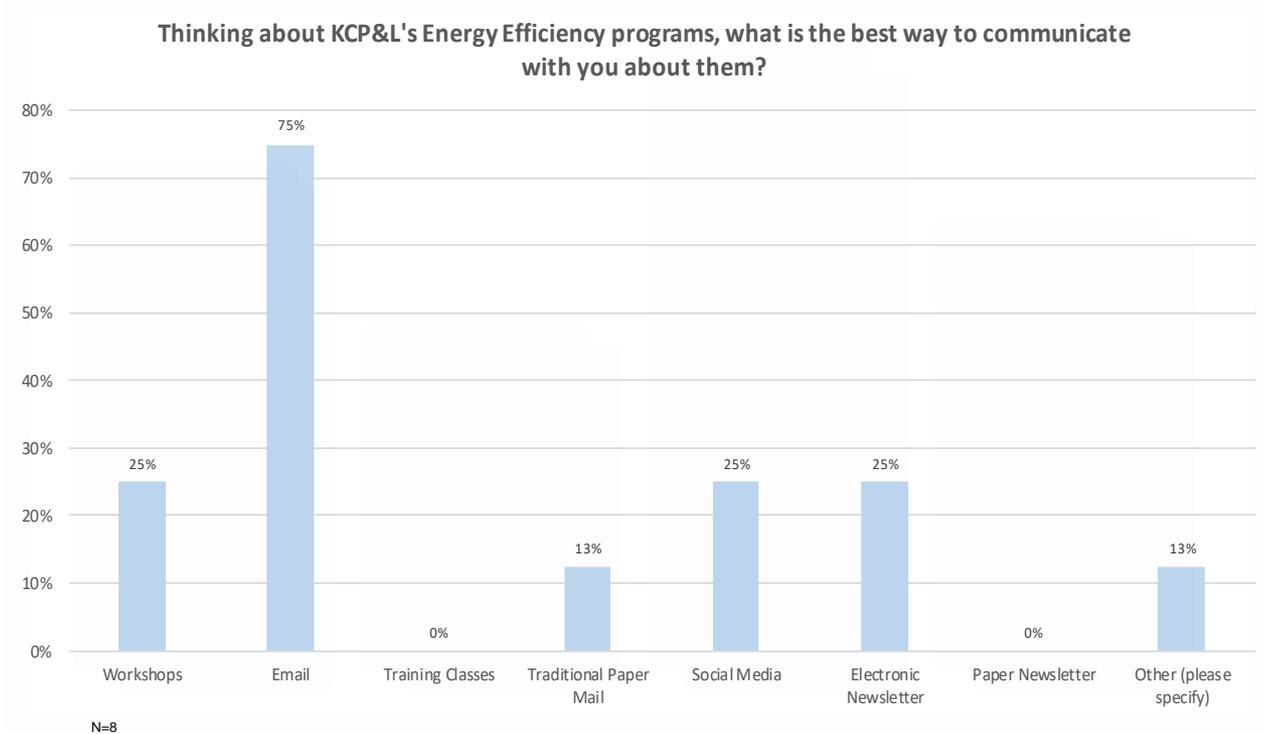


Interest in Training



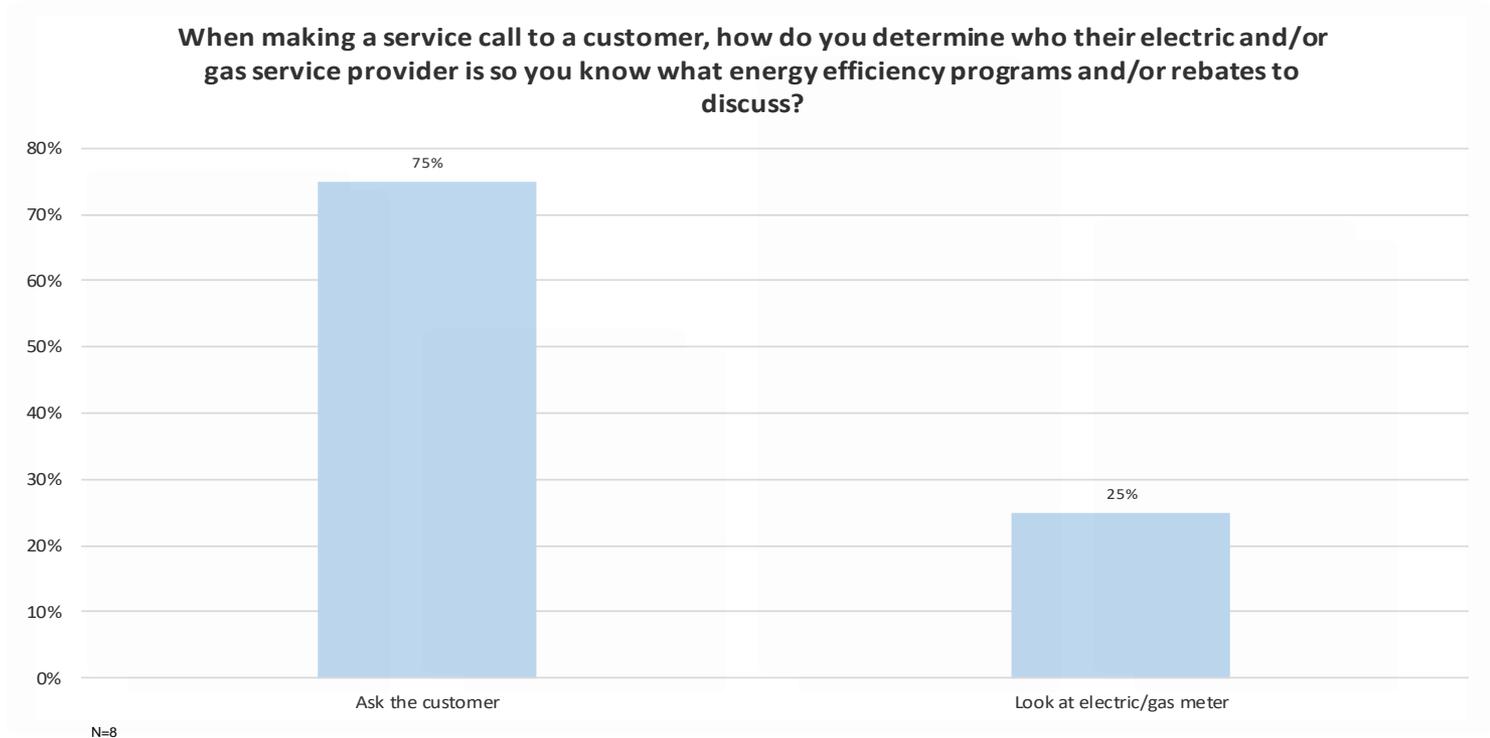
- Other (please specify):
- How effective is this program in saving customers energy. Post project analysis for jobs completed.

Preferred Communications

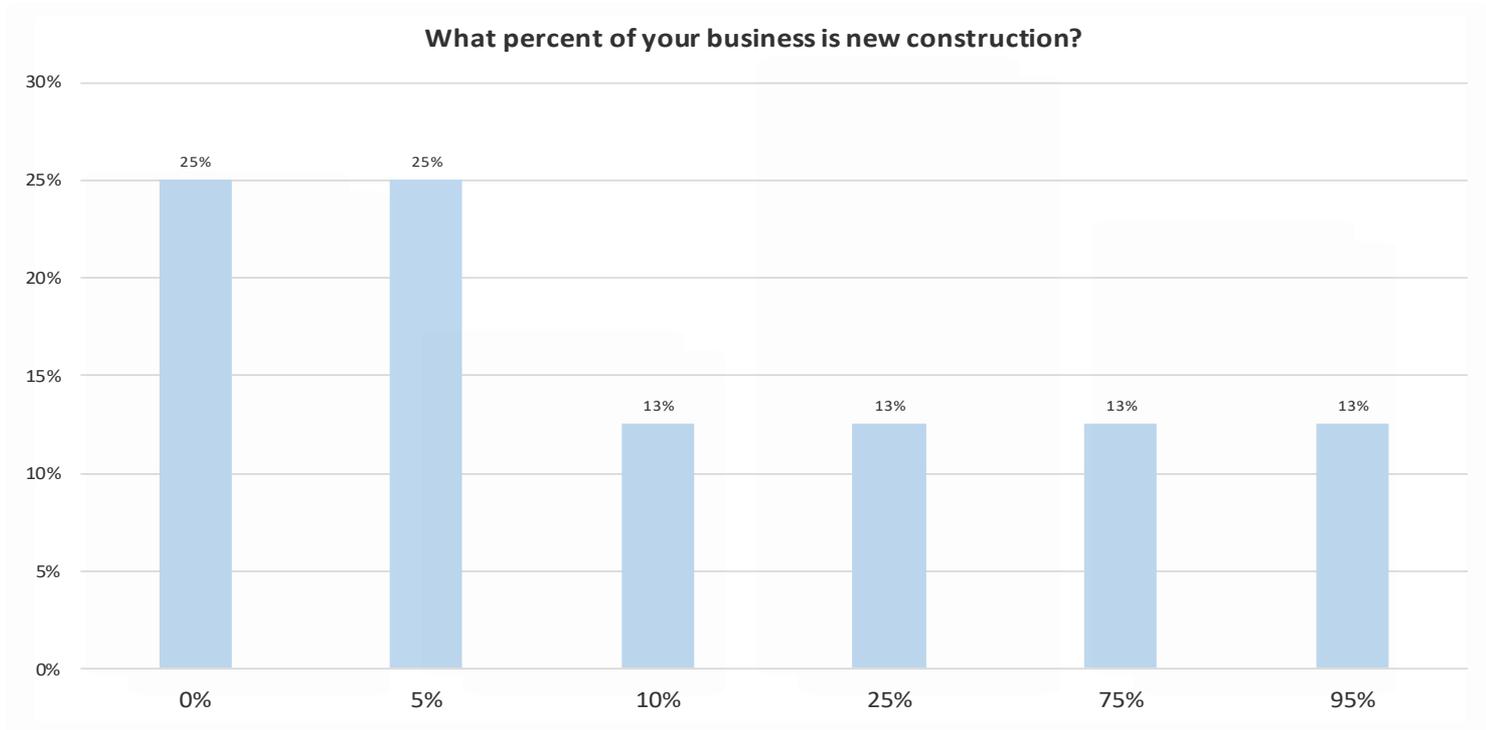


- Other (please specify):
- Account rep

Service Provider



Customer Type – New Construction



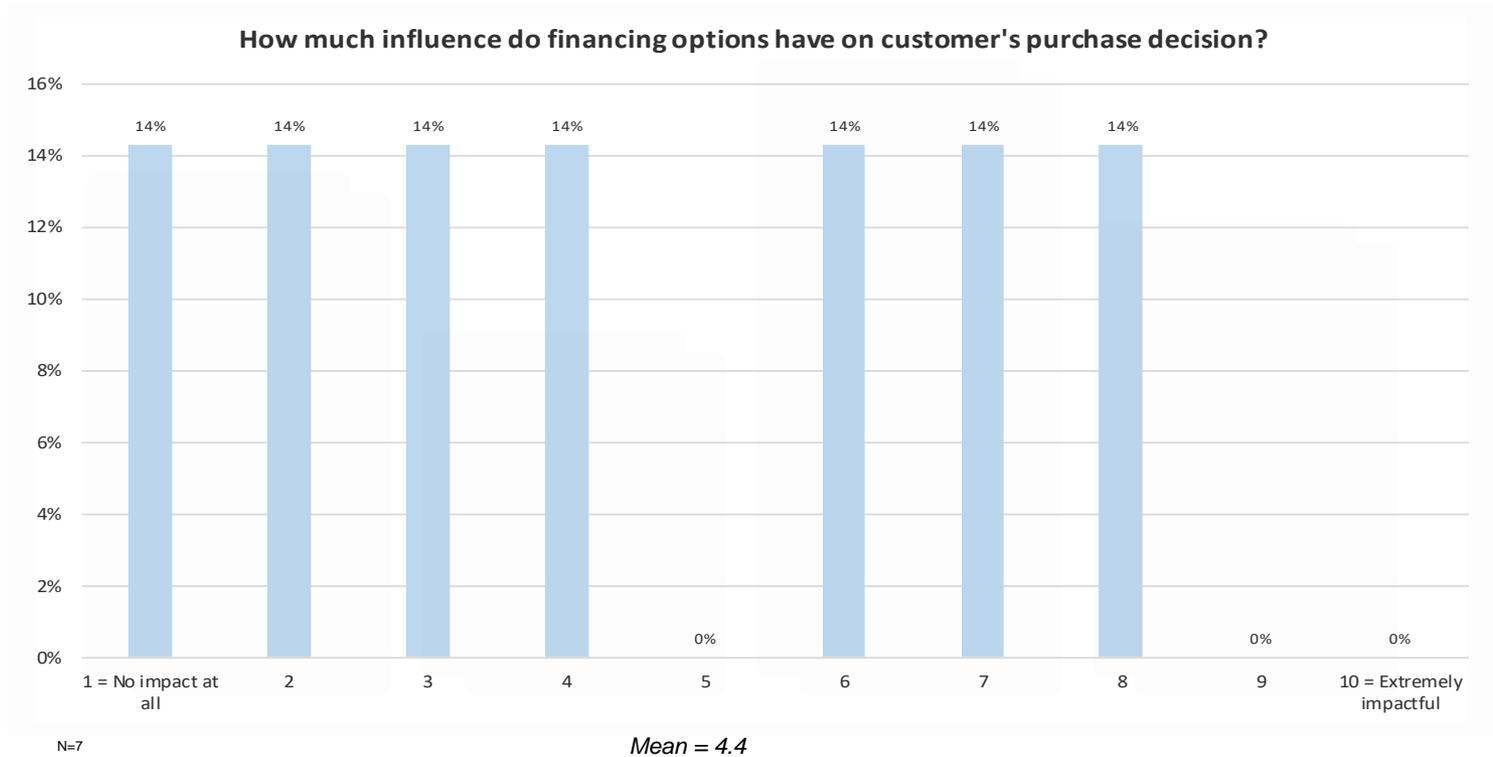
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Reasons Customers Do Not Participate

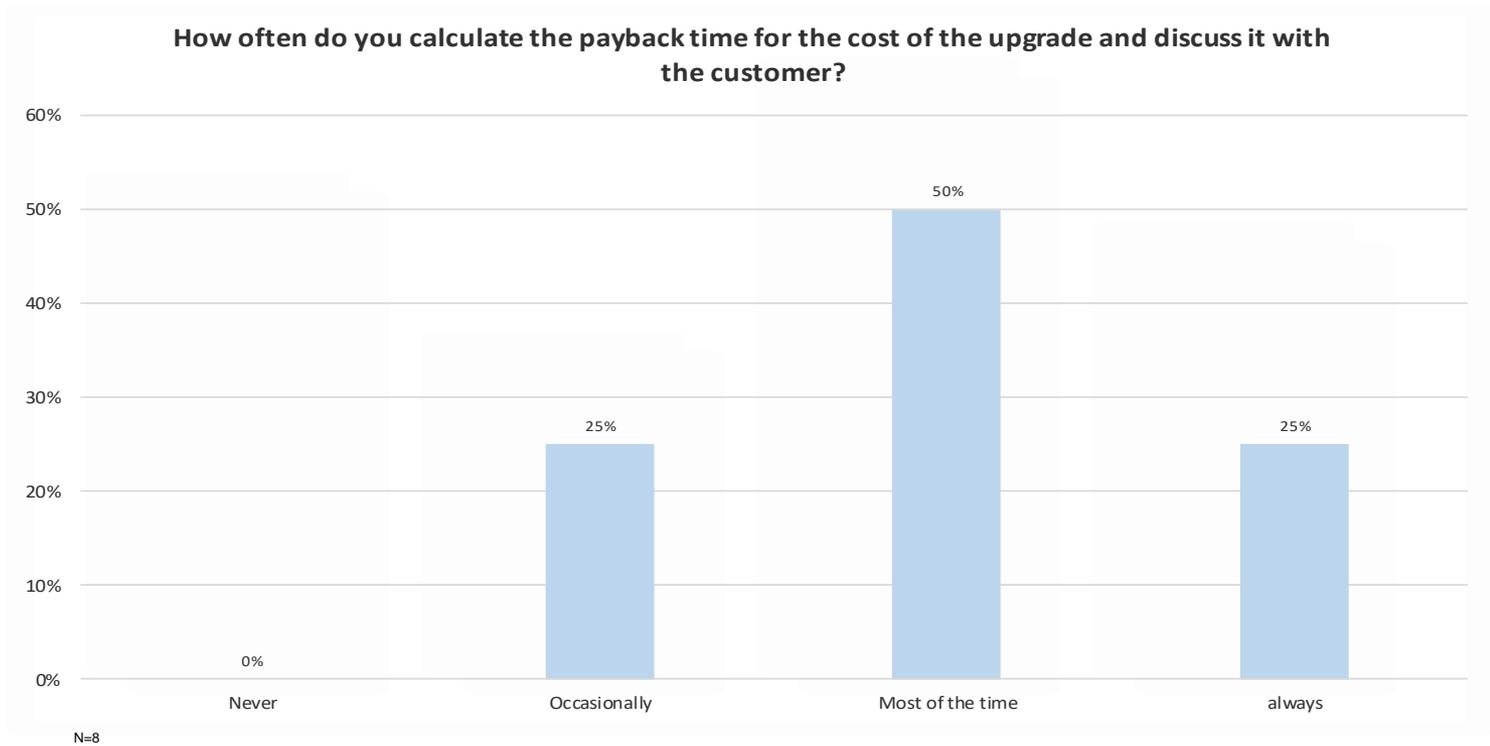
Based on your interactions with customers, what are the main reasons that a KCP&L residential customers do NOT participate in the rebates available to them?

- *They aren't made aware of them. Only the heat pump and AC program is promoted, not the insulation and air sealing programs.*
- *My customers do not try to afford the high efficiency equipment*
- *Total Cost*
- *Do not want to pay the audit fee*
- *Additional cost of Energy Audit in order to get certain rebates*
- *I don't think we've had a customer not participate in a rebate, but if someone wouldn't I would assume because they don't think it's real. So getting customers to understand that it's not a scam and actually real would help*

Influence of Financing Options



Payback Calculations

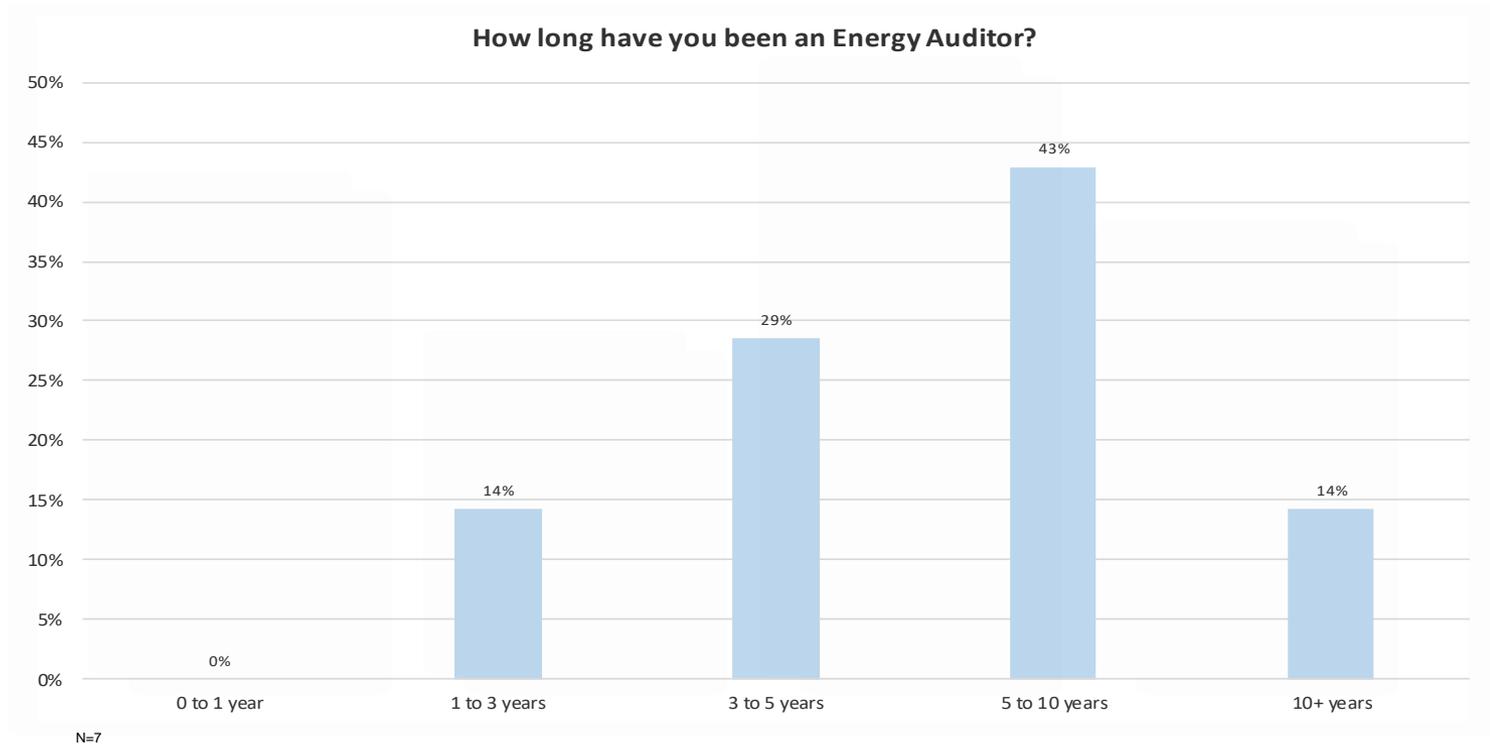


Program Suggestions

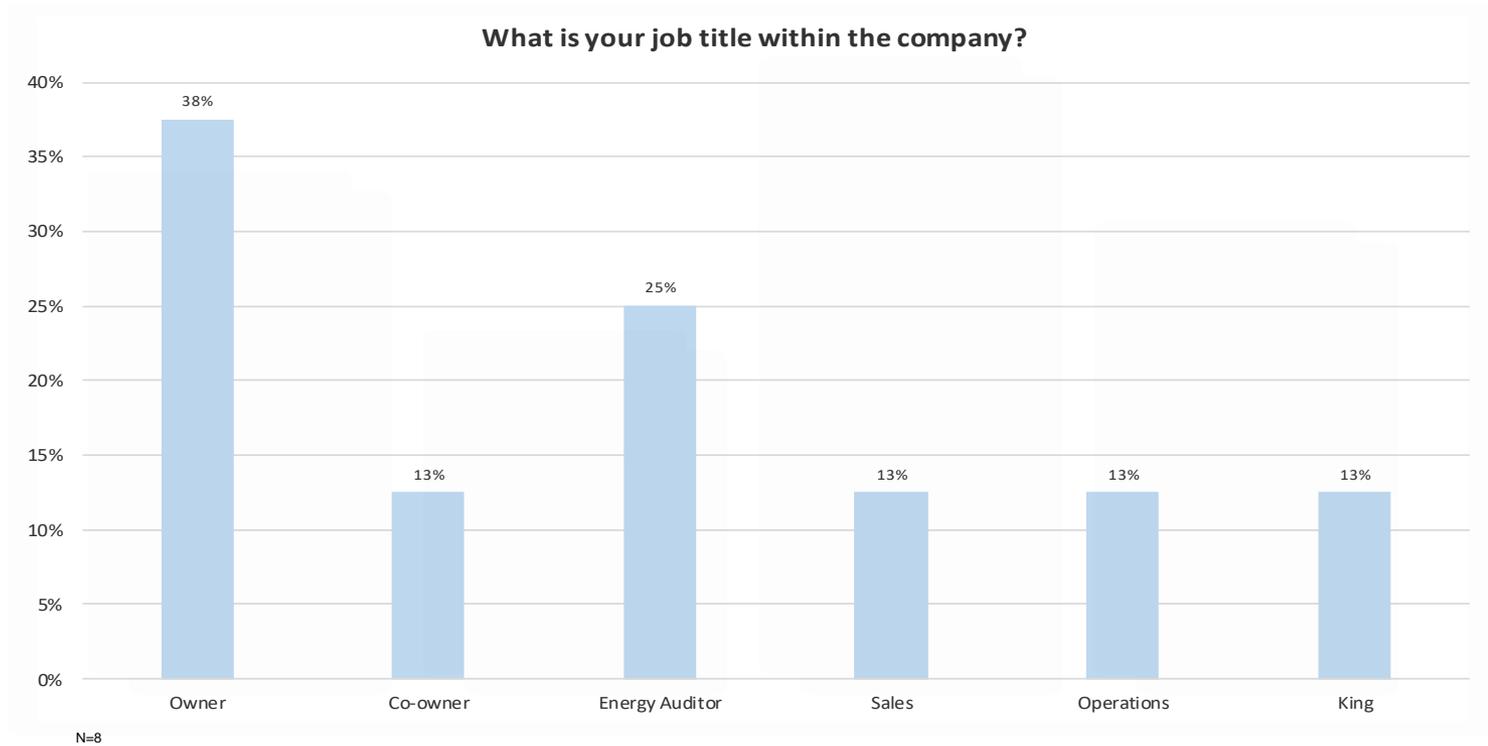
Is there anything missing that you think would be successful from KCP&L's programs related to energy efficiency? This could include rebates currently offered or something that is not currently being offered.

- *Marketing materials promoting the insulation and air sealing joint program with Spire would be really helpful--something with a little pizzaz, and not just a page full of rebate numbers/amounts*
- *Rebates are not big enough to cover cost difference*
- *Bigger rebates*
- *Needs offered in Kansas*
- *Rebate for energy audit*

Energy Auditor Experience



Title within Company



MEEIA III

Residential Customer Research

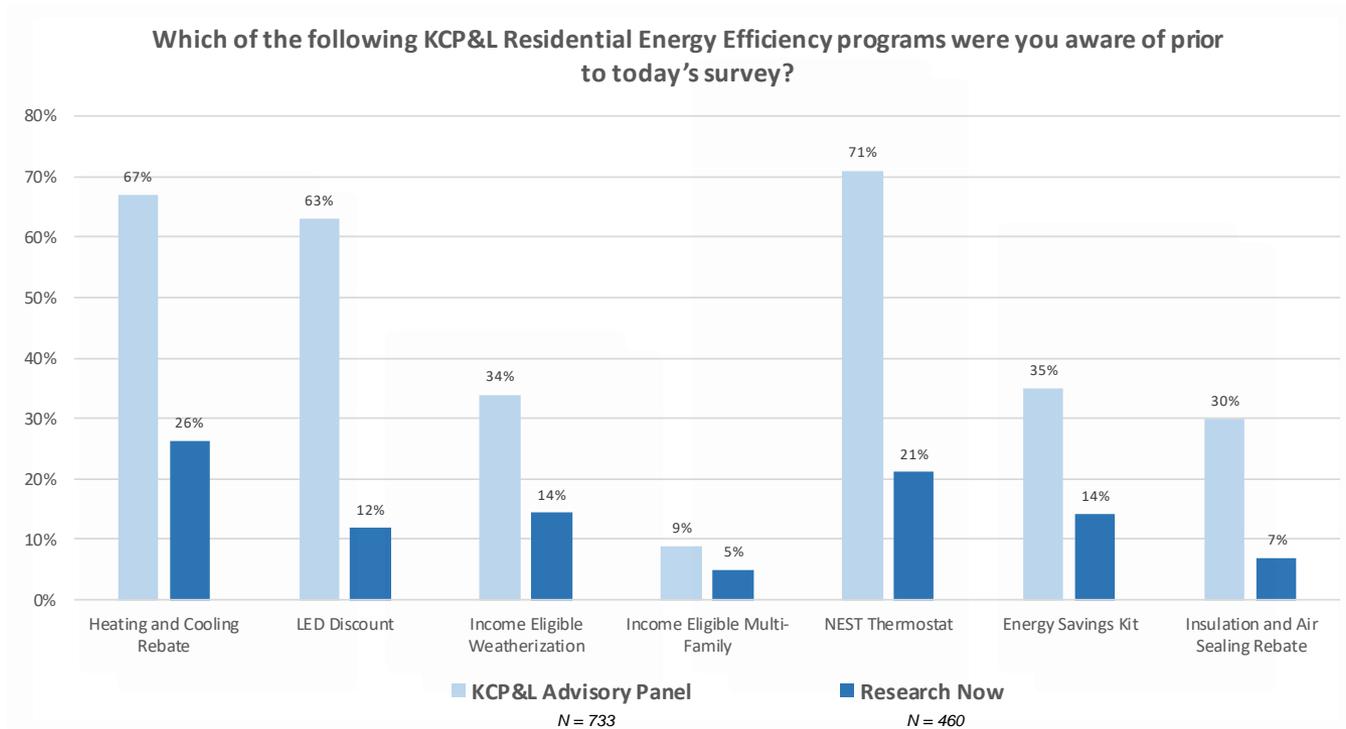
December 18, 2017



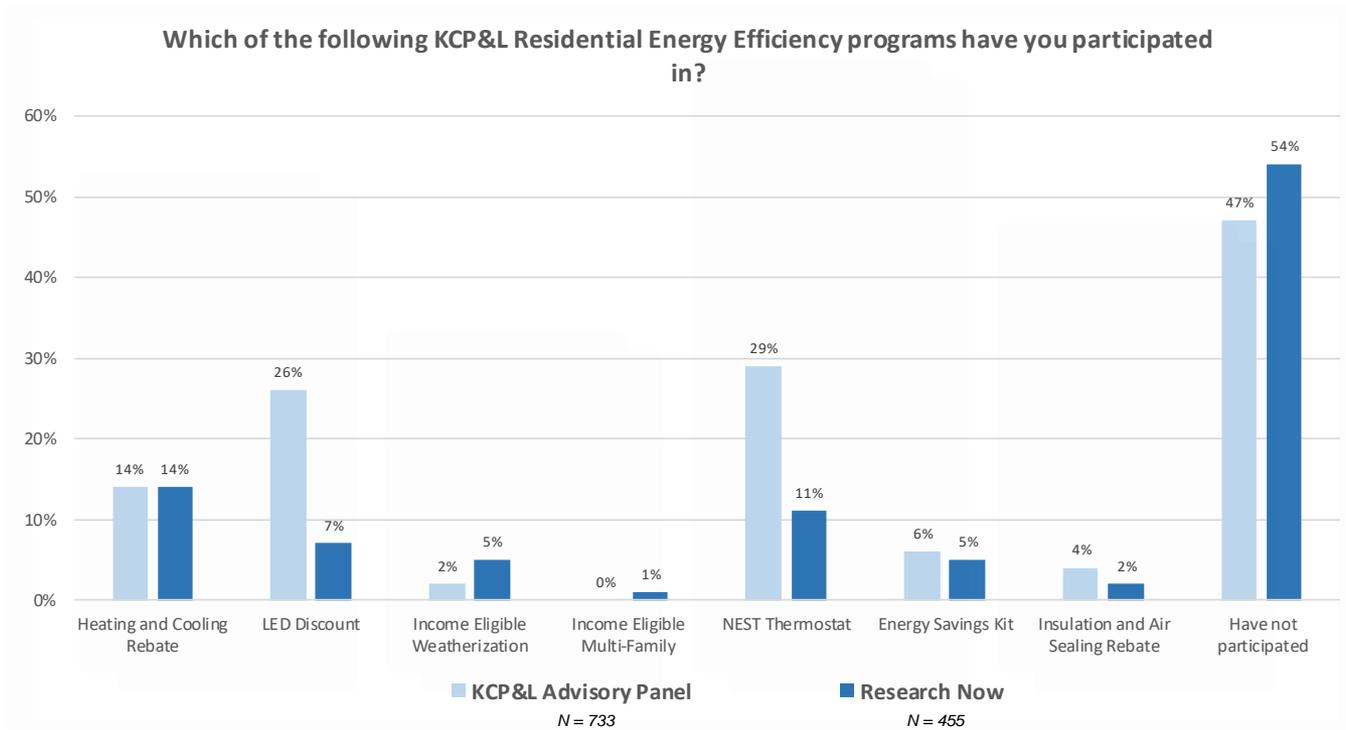
Summary of Findings

- Several customers indicated that they would be willing to reduce their electricity usage on those days when KCP&L calls an event to reduce demand. Some would like to be compensated somehow for doing so while others would not expect anything for reducing their usage. I think this is something KCP&L should explore further with test notifications to see how much load could be shed during an event.
- There is a relatively small group of customers that will be likely to replace their HVAC systems any time soon. Approximately one-third of customers report that their HVAC system is less than 5 years old and another one-third have HVAC systems between 5-10 years old. This research indicates that there is approximately 15% of customers who have HVAC systems that are 15+ years old. In addition, most customers are planning on waiting until their HVAC system stops working completely or becomes too expensive (\$1,400 average) to repair before replacing. I would suggest that KCP&L and HVAC Contractors develop a partnership with those customers enrolled in a maintenance/tune-up program so we have additional customer info to target those with older systems. Several HVAC contractors indicated they were interested in developing a program together.
- Over one-third of customers do not know what a Heat Pump is. In addition, there continues to be negative perceptions of Heat Pumps among both customers and contractors that make them a harder sell. These barriers are most likely going to make it very difficult to meet Heat Pump goals if not addressed somehow.
- A small group of customers feel that it is important to be able to remotely control home devices and are starting to install those types of products. It is certainly something we need to keep in mind for future offerings and monitor closely.
- KCP& should explore the opportunity to expand the Home Energy Assessment program by offering to allow customers to self-install items mailed to their homes. There is a group of customers who don't have time to schedule an appointment or do not want strangers in their homes but still would take advantage of the program if offered.
- The two biggest reasons for NOT participating in KCP&L's SMART Thermostat program are 1) Giving up Control and 2) already have programable thermostat. In fact, more than half of the customers already have programable thermostats and that number continues to grow. The energy savings of KCP&L's Thermostat program is most likely being impacted by this trend of fewer manual thermostats being replaced. I assume there are still some energy savings when switching from a Programable to a SMART thermostat but less than those switching from a manual thermostat. However, there are additional benefits of a SMART thermostat that appeal to many customers.
- There doesn't appear to be a lot of interest in the Water Heater Switch. Several customers have gas water heaters while others don't want someone else to control when they have hot water. A few others indicated that the \$25 was not enough to make it worth their time to participate.

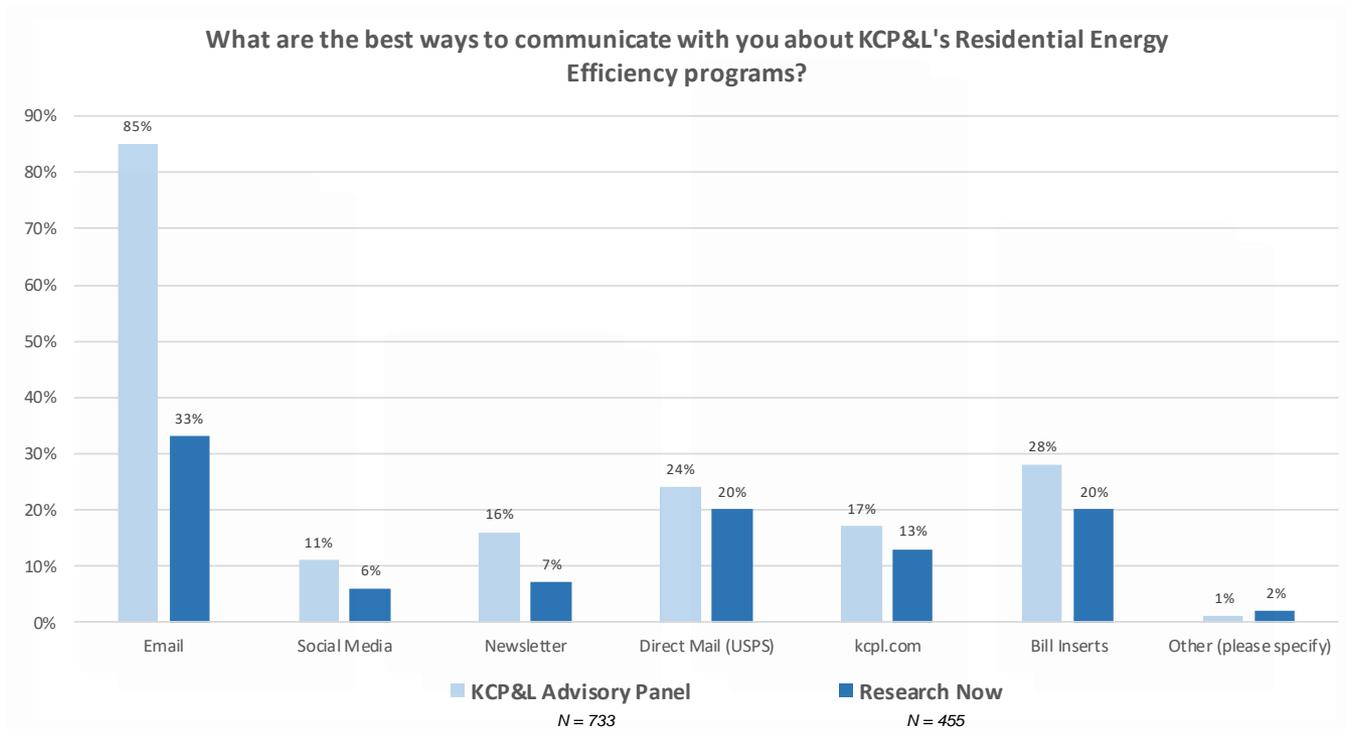
KCP&L's Residential Energy Efficiency Programs Awareness



KCP&L's Residential Energy Efficiency Programs Participation

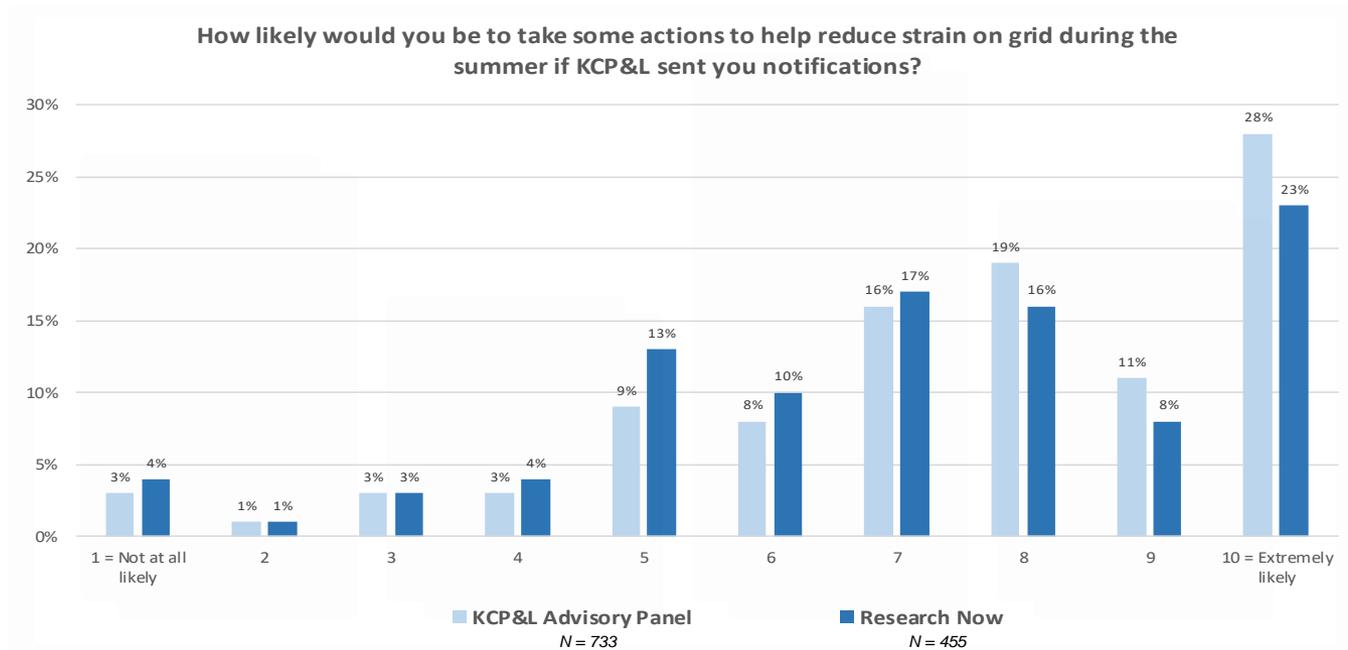


KCP&L Energy Efficiency Communications



Reducing Electric Usage During Events

Occasionally, there are a few days during the summer when demand for electricity is very high due to extreme heat. Like many other utilities, KCP&L has programs in place to notify customers of the situation and ask them to reduce electric usage if possible.

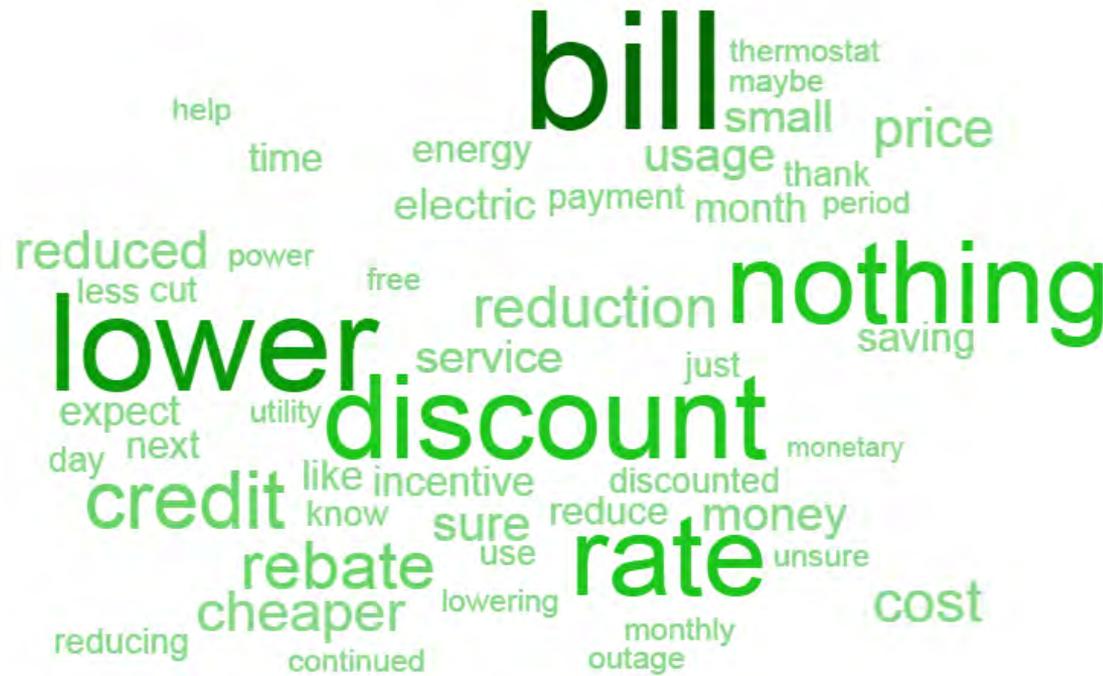


Means:
Advisory Panel 7.55
Research Now 7.10



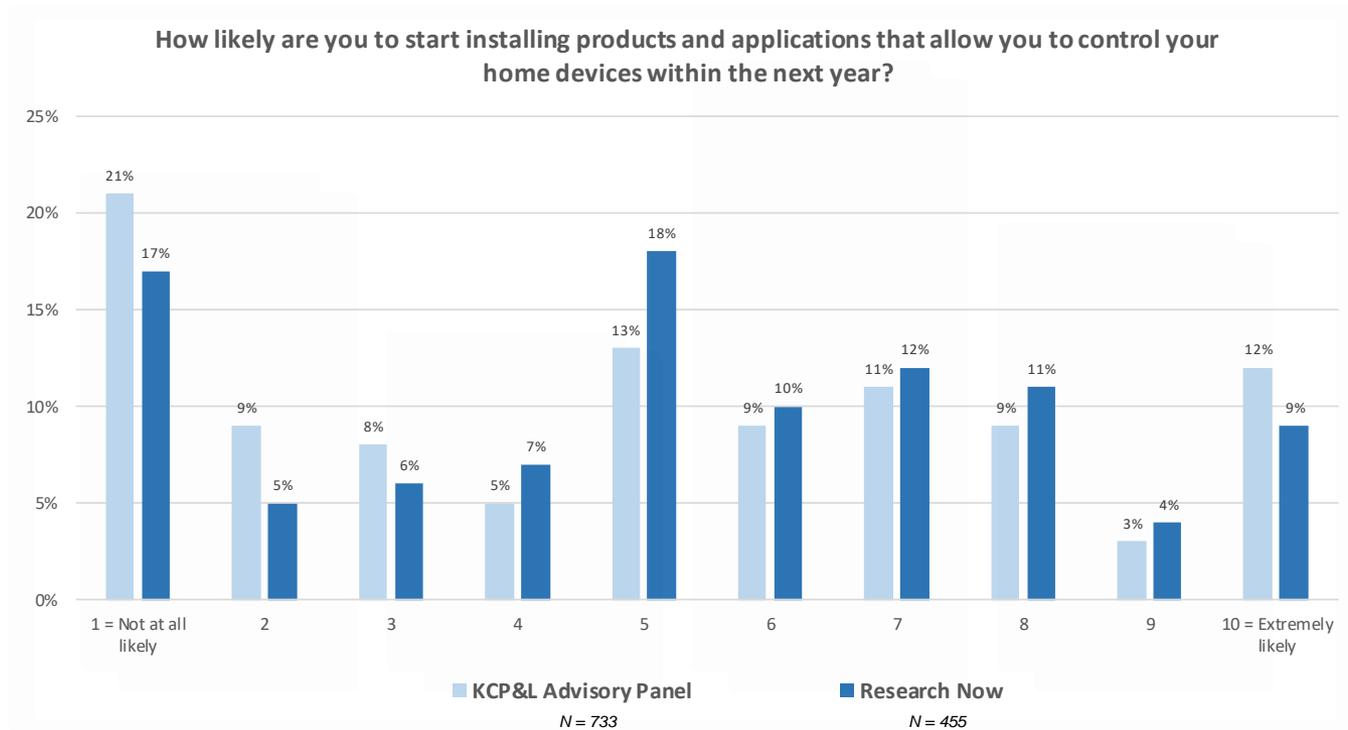
Customer Expectations for Reducing Electric Usage

What would you expect in return from KCP&L for reducing your usage during the event?



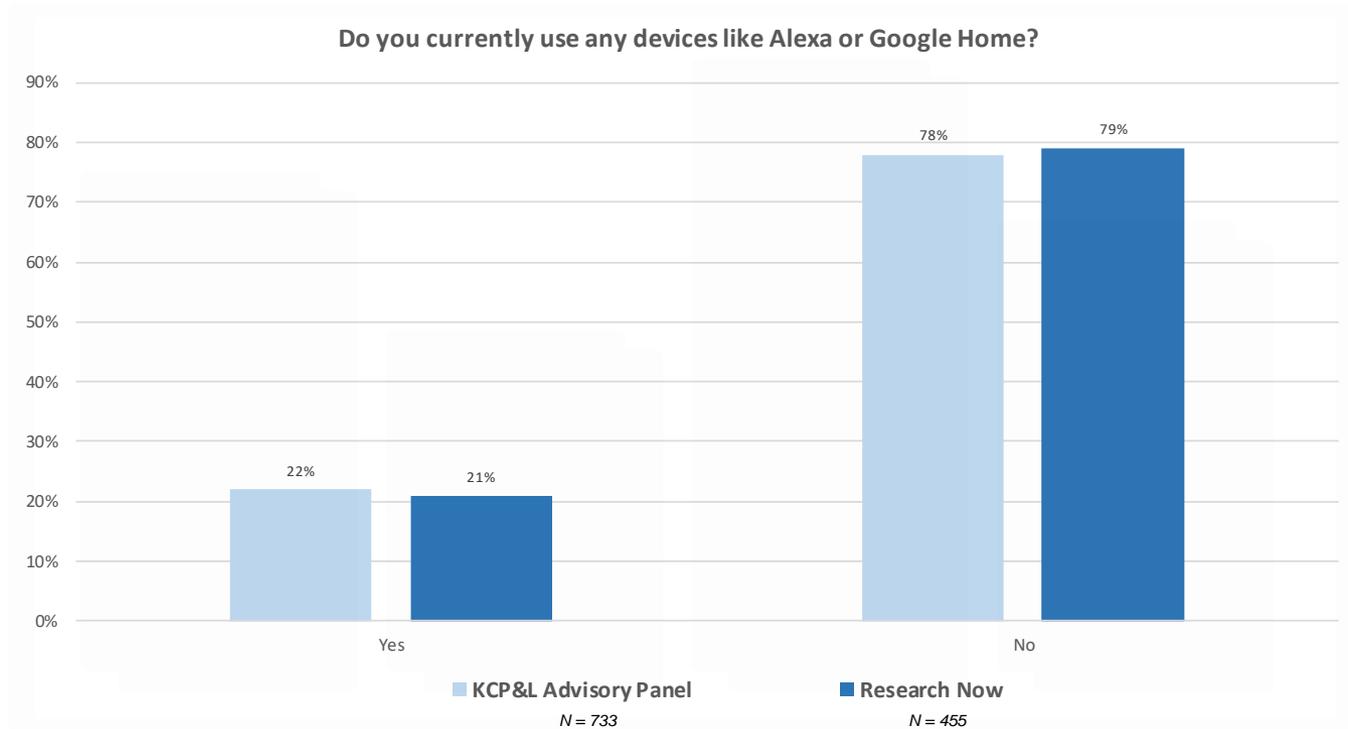
Note: See Appendix for detailed responses

Remotely Controlling Home Devices

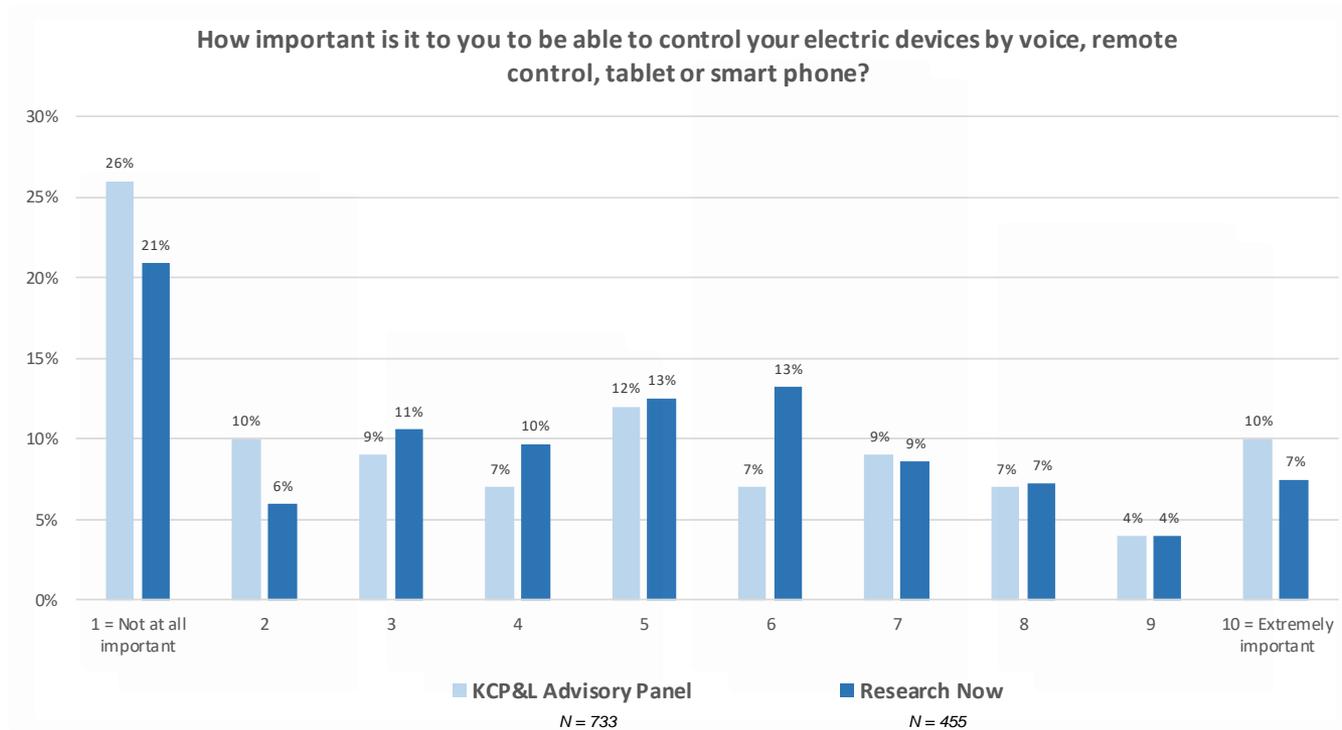


Means:
 Advisory Panel 4.95
 Research Now 5.27

Usage of Alexa or Google Home

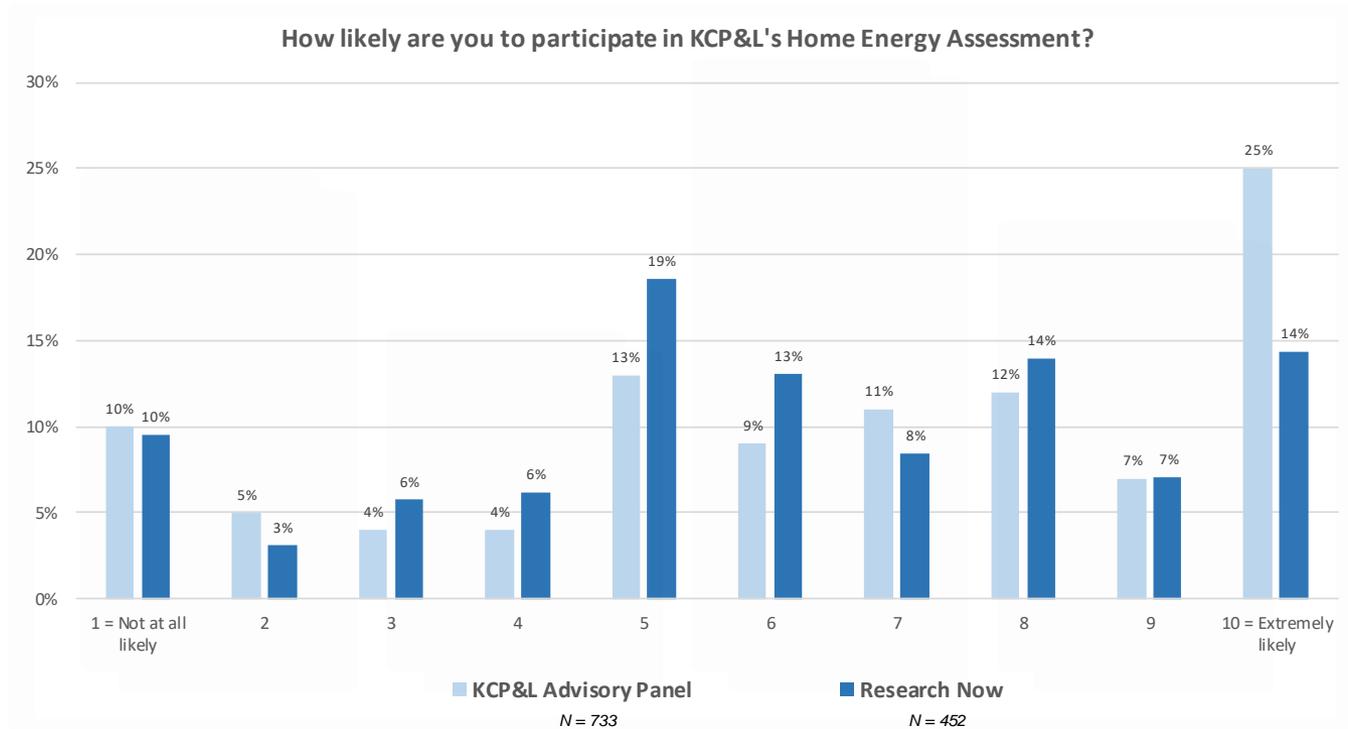


Control of Electric Devices



Means:
 Advisory Panel 4.53
 Research Now 4.73

KCP&L's Home Energy Assessment



Means:
 Advisory Panel 6.50
 Research Now 6.07



Reasons for Not Participating in Energy Assessment

Why are you not likely to participate in KCP&L's Home Energy Assessment?

Already have thermal windows, siding & added attic insulation, and have changed most lights to CFL or LED, with new furnace & A/C in 2011. Not much else to assess.

am comfortable with our home the way it is.

because I want to be in controll.. and if they start telling me I have to start buying stuff Im out

Big brother syndrome

Busy schedule

doesn't interest me

Don't have funds to makes major changes

Don't have the time

Don't like to let strangers into my home

home is already energy efficient

I am pretty sure that I've done almost everything possible to conserve energy in my home.

I am renting

I am very knowledgeable about these systems already

I dont like strangers in my house

I work during the hours available/ scheduled

My house is in awful shape

New home already energy efficient.

Not important to me, upgrades are too expensive

sounds like a sales pitch for crap i dont want

Takes to long

Time is an issue

Too fixed in my ways

Too much hassle

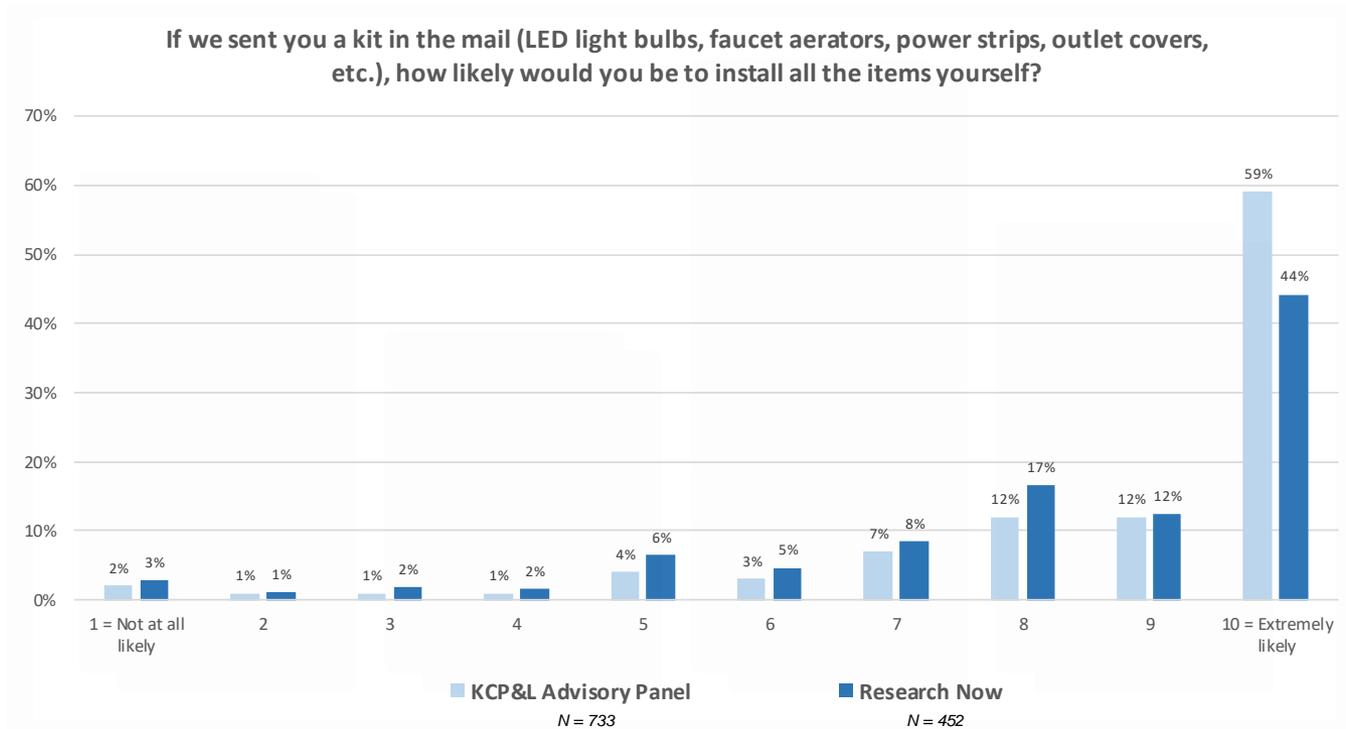
We already have energy efficient for heating

We are on par with other in the neighborhood and have HE washer and heating/cooling.

Why should I participate

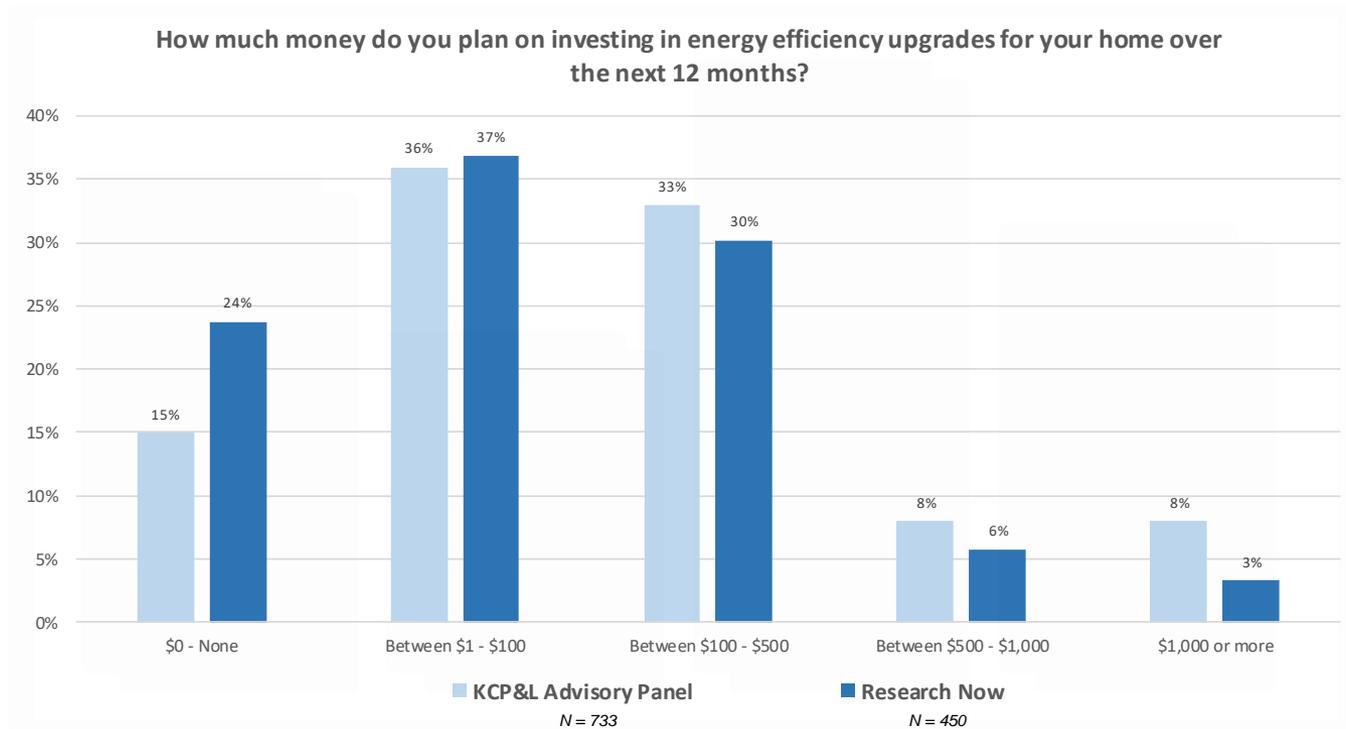
wouldn't want strangers in my home

Self-Install of Energy Savings Kit

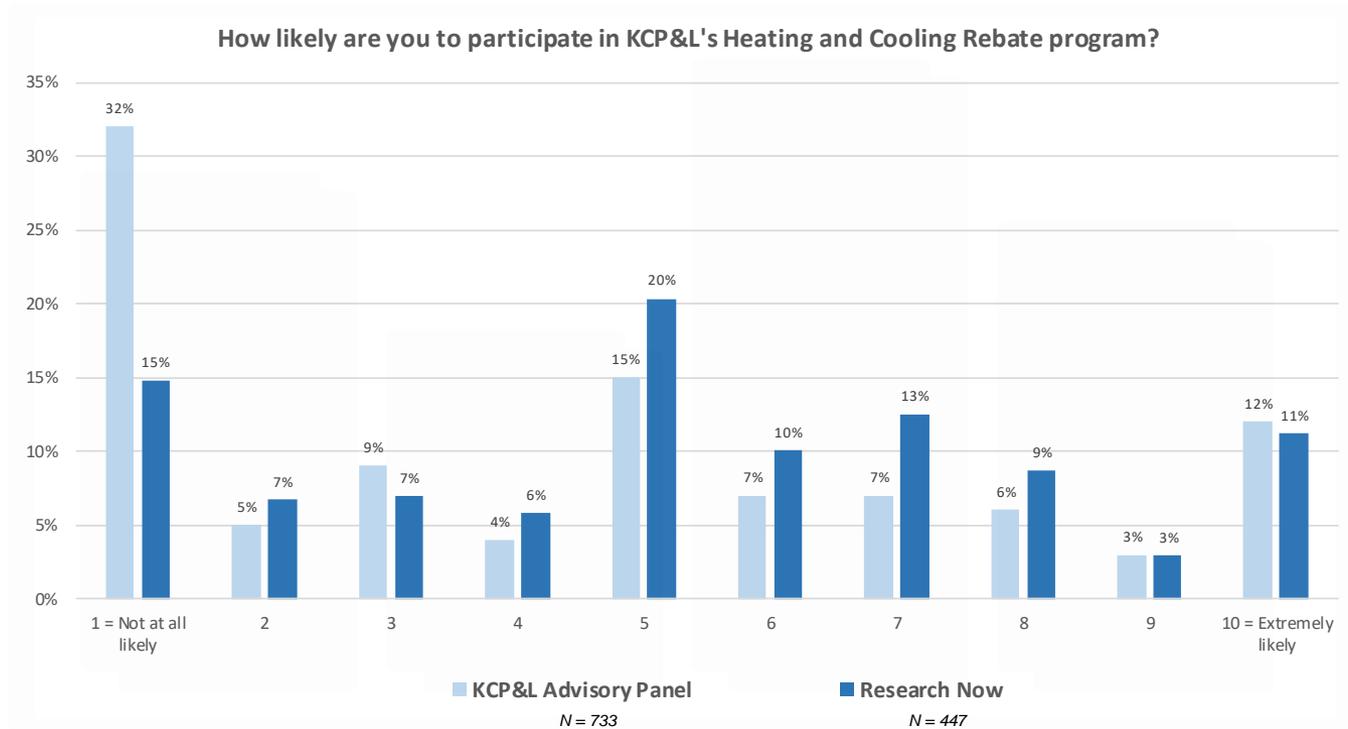


Means:
 Advisory Panel 8.83
 Research Now 8.22

Investment in Energy Efficiency Upgrades



KCP&L's Heating and Cooling Rebate



Means:
 Advisory Panel 4.46
 Research Now 5.30

Reasons Why Not Participating in KCP&L's Heating and Cooling Rebate

Why are you not likely to participate in KCP&L's Heating and Cooling Rebate?

No time	Costs too much to replace working heating and cooling systems
Already did	Not my heating& cooling system
My house is a rental	Because I'm moving to Seattle
newer air and furnace	Just bought new heating and cooling 2 years ago.
we just bought a new furnace and a/c and it did not qualify	I did that a couple of years ago
system is already energy efficient	Electric incuded in rent
New AC and New Furnace-both energy efficient	Our heating and cooling system are new
Not planning on being I house that long.	too restrictive in providers you can use
My house is not even 10 years old.	We are heating & Cool system.
New house with heating and cooling already installed	I just replaced my entire HVAC system.
	have two year old heatpump and electric backup strips never come on due
have replaced furnace and a/c within last 10 years	to a non electric pellet stove
relatively new equipment in place	Don't need new equipment
already replaced furnace and a/c	Our unit is two years old.
have a heat pump already and a high efficiency gas furnace back up.	
House was built with extra insulation, thicker walls and better windows.	no interest
no interested	We already participated. great program, I actually tell everyone about it
Just got a .new furnace and water NB heater two years ago and out side	
unit is 4years old	Replaced our HVAC system only 4 years ago.
do not have forced air	Because we rent our home
Can't afford it	My AC/heating system is only 5 years old and is energy efficient.
not enough\$	No time
Entire HVAC system replaced 2 years ago	Don't have the energy to
Just did it in the last two years	House is old
just bought	It doesnt make sense to do so
Just purchased a new system this summer.	I'm not in charge of the bill
do not need replacement furnace	Replaced heating system and a/c about 8 years ago. Got no rebates
My house is only 3 years old.	have already replaced my unit
house is energy efficient	I don't really care to be honest

Reasons Why Not Participating in KCP&L's Heating and Cooling Rebate

Why are you not likely to participate in KCP&L's Heating and Cooling Rebate? - continued

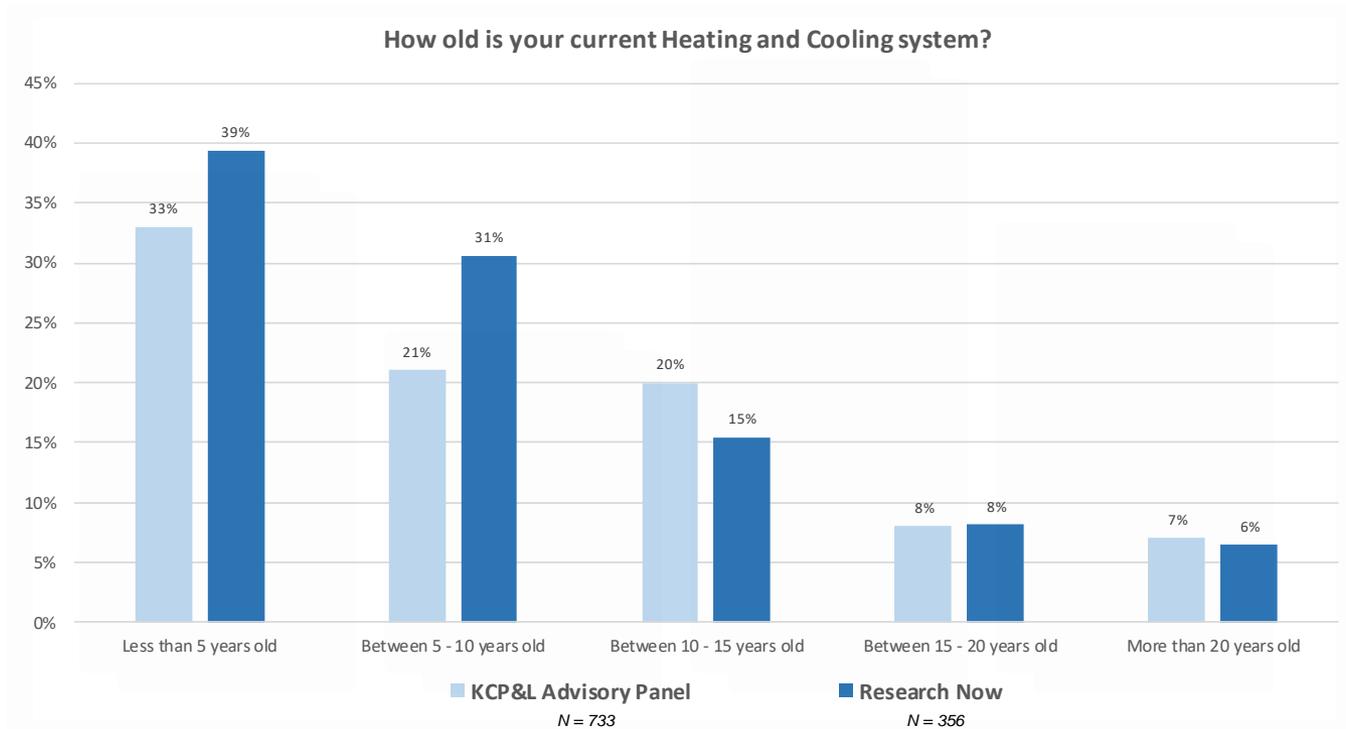
Have fairly new heating and cooling system, high eff...	Because my bill is not as high where I can't afford to pay it my house is very comfortable I do not have a lot of air coming in or air going out
Can't afford to do a project that big.	Installed a new furnace (90%+ efficient???) in 2006.
We replaced our furnace and AC recently and installed a gas heater that doesn't use electricity. We probably will get a new thermostat in the next couple years	I don't know
I had to replace my AC last year. There are only a few specific types or models of replacement systems eligible for the rebate. Ones that are not practical for installing in a single family home.	Don't know what it's about or how it works
EVERYTHING WORKS	I don't know if I would or not
Just bought a new build house	money
Not interested	Already did it
No time	I'm not sure if the benefit would be that great compared to our current equipment.
have a new unit	Cannot afford it right now
We just installed new heat and cooling. Not likely to do so again soon.	Not eligible
Moving out of coverage area.	I can't afford it.
replace a/c & furnace 3 yrs ago	I already replaced both the furnace and air conditioner recently with energy efficient replacements
units too new	utilities are included in my rent
Short on cash	Money
My furnace and heat pump are 8 years old	Will not be upgrading
Laziness	nwer home
Not interestrd	i live in government ran property and i am not allowed to make those changes
Upgraded years ago.	mine is less than 10 yrs old
i am renting so i can't changed a lot o things in my apartment but i would like too	Have a very good system
I don't need another system yet.	My heater is on gas, and I just use fans in the summer.

Reasons Why Not Participating in KCP&L's Heating and Cooling Rebate

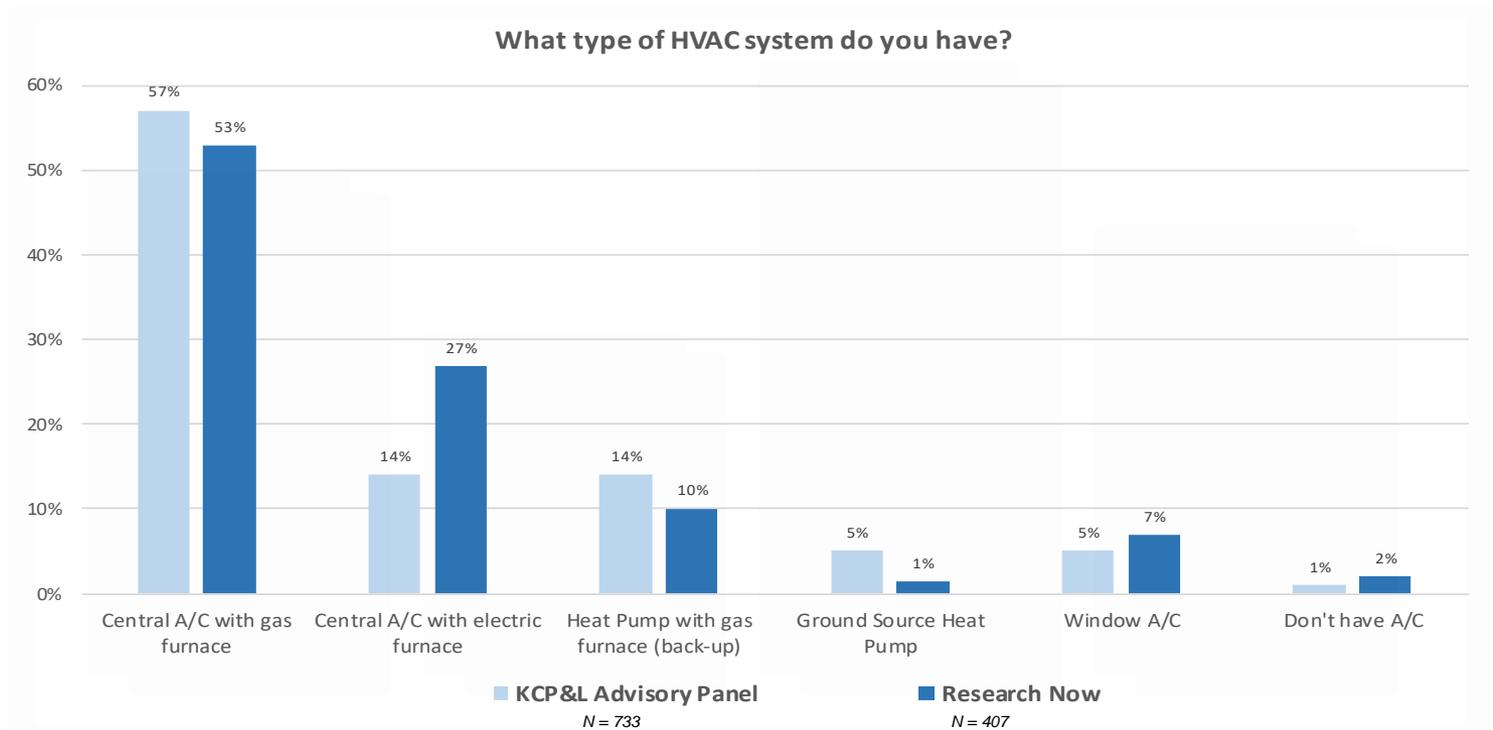
Why are you not likely to participate in KCP&L's Heating and Cooling Rebate? - continued

Utilities included in rent	Just purchased a new unit cheaper than going thru KCPL contractor
Have new Home with new unit	We recently did this.
I replaced my system with a high- energy rated system 3 years ago so mine is in excellent condition and still almost new.	Installed new furnace/air conditioner approx. 8-10 yrs. ago
Just replaced furnace & A/C in 2011 with improved efficiency models.	relatively new home and heating/cooling unit
We did use the rebate program 4 yrs ago when we bought a heat pump. We will not buy another one soon.	we can't afford to replace our unit
Too expensive. Not going to replace systems until they fail and need to be replaced	Recently replaced our equipment and cost.
cause from what I ear you arent in charge	We have a new home with energy efficient heating and cooling already
I rent a house and do not make financial decisions on those upgrades.	can not afford the new system
I had a new heating and cooling system and hot water heater installed in my home about 5-6 years ago.	My house is efficient as it is
We already replaced furnace and ac this year	Bills
ours isnt 10 years old yet	i already did
We have a newer system, but we're unaware of any rebates we might of been eligible.	I don't need it.
No need for a new unit.	My usage is low
	Because it costs too much to replaced.

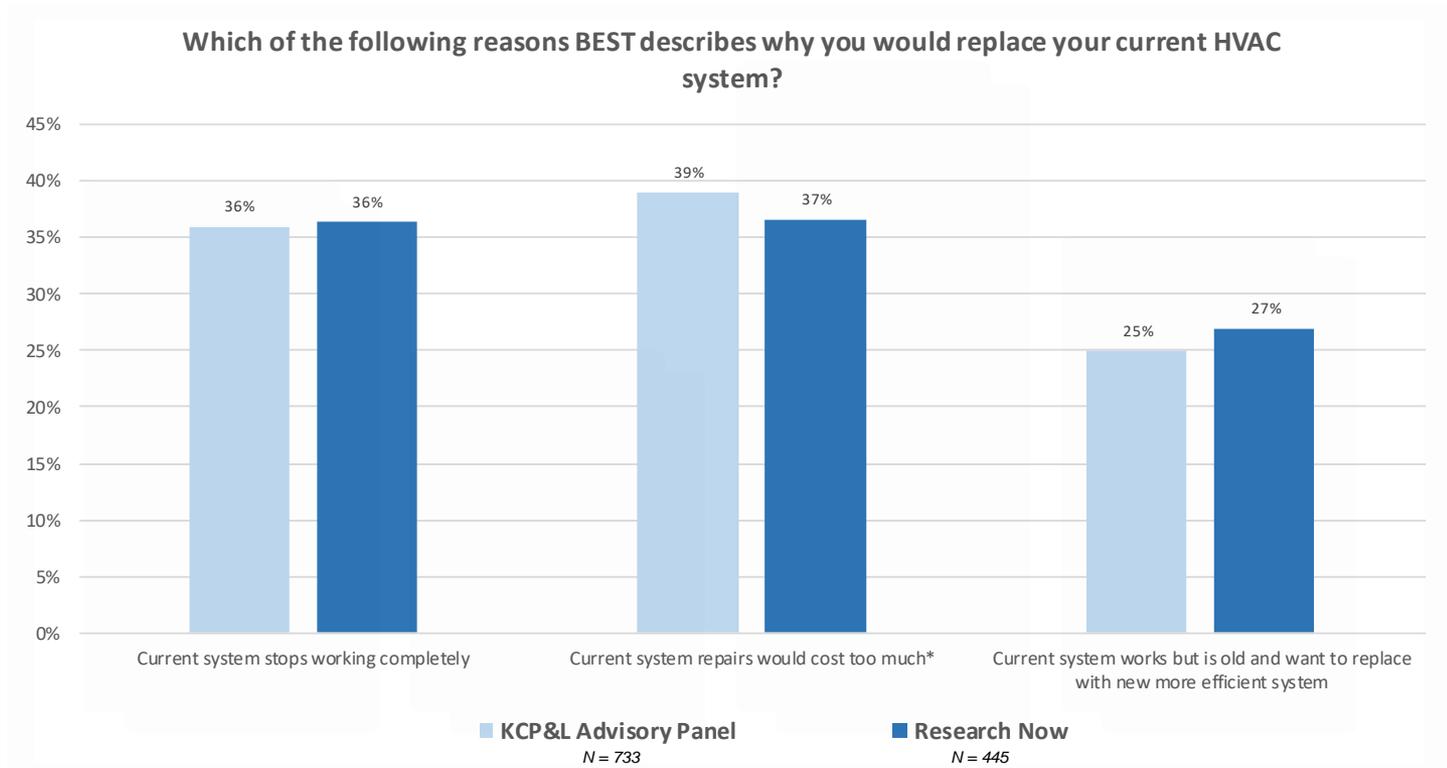
Age of HVAC System



Type of HVAC System



Reason to Replace HVAC System



* Average repair cost that would be too much = \$1,400

Top Influences in HVAC Purchase

There are several things that can influence your purchase when you decide to replace your current system.

Please sort the following items from 1 = Most Important to 6 = Least Important in your purchase decision.

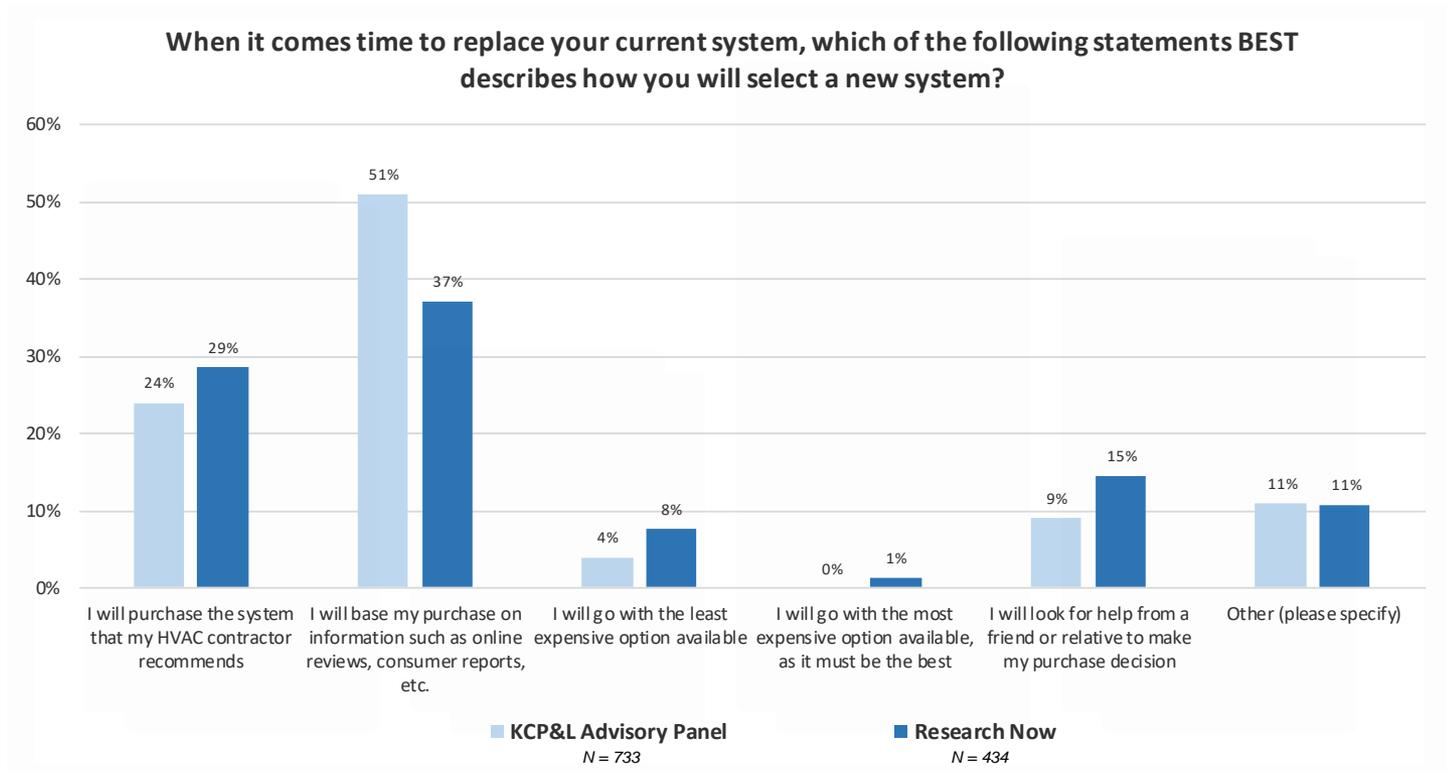
KCP&L Advisory Panel		
1	Energy Efficiency Level	2.35
2	Upfront price	2.50
3	Sales / Rebates	3.24
4	Warranty	3.58
5	Financing Options	4.52
6	Brand Name	4.80

N = 731

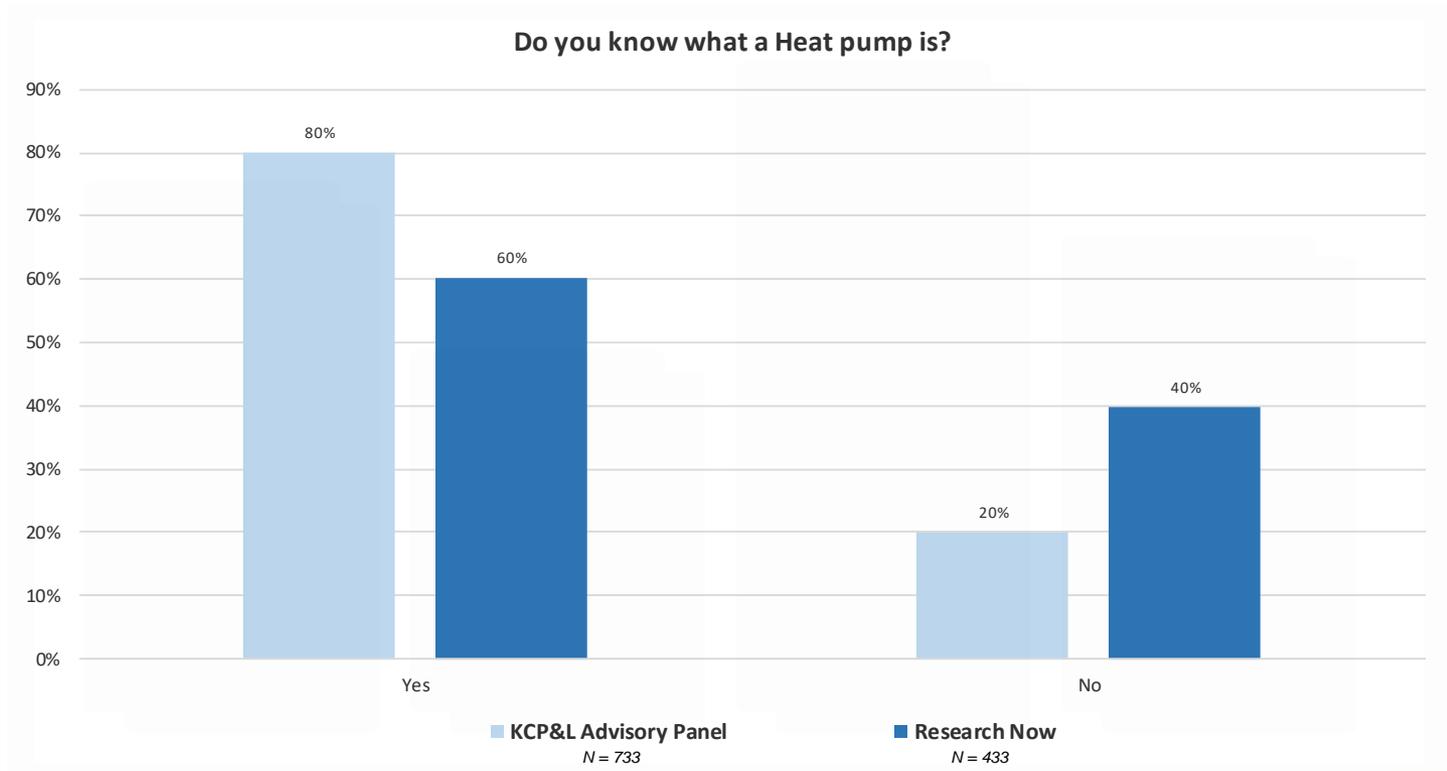
Research Now		
1	Energy Efficiency Level	2.93
2	Upfront price	3.11
3	Warranty	3.16
4	Sales / Rebates	3.55
5	Brand Name	3.98
6	Financing Options	4.27

N = 436

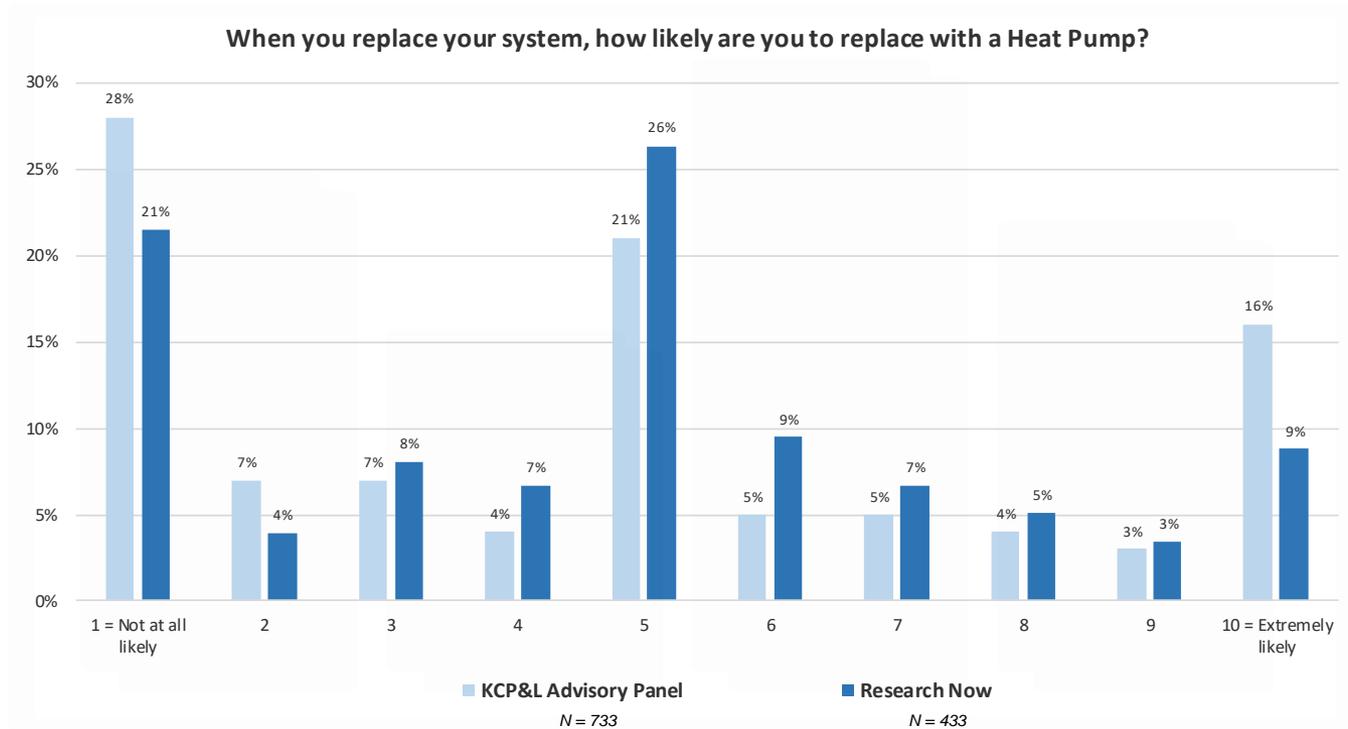
Selecting a HVAC System



Heat Pump Knowledge



Likelihood to Replace HVAC System with Heat Pump



Means:
 Advisory Panel 4.70
 Research Now 4.75

Reasons NOT to Replace Current HVAC System with Heat Pump

Why are you not likely to replace your current HVAC system with a Heat Pump?

Reduced life expectancy, gas is cheaper per btu my gas furnace is the most efficient available already	Higher operating cost than gas heat
It works	dont need one
Mine still work	Had one it was much harder on compressor
I have not ever owned one and Bono's no one who does	Have one now. Heat pump runs 2/3 to 3/4 time for year so working expectancy is less than regular ac unit
A friend has one and is not happy with it	I don't know what it even is or how it works.
To expensive	New system
because when we just replaced our system, we didn't get a heat pump	Because I don't know what a heat pump is.
I rent	I don't own
they seem to have alot of problems	Cost
My service man was here today to service do annual maintenance on my furnace. We talked about my home systems and what to install when its time to replace them. He didn't mention a heat pump.	I don't want to go to the expense.
Just replaced the old heat pump. Didn't think it was of great value to me.	Don't need to
not want	Cost
I am Renting an don,t have to Replace it	I had one before and it cost me more
Not sure	Dislike
Too expensive.	Don't own
For the part of the country i live in they make no sense, had one in last home and lasted 6 yr. Replaced it with a standard compressor.	ldk what it is
had one in texas and was not impressed with it	I like it the way it is
Too expensive	Because I rent
We have radiators	I don't know that it helps
Renter	cost
Do not have enough savings	I don't know.
not heard good things	Don't last as long
I had one before and you don't get a break on bill and gas is cheaper	None of the other units in my building have one



Reasons NOT to Replace Current HVAC System with Heat Pump

Why are you not likely to replace your current HVAC system with a Heat Pump? - continued

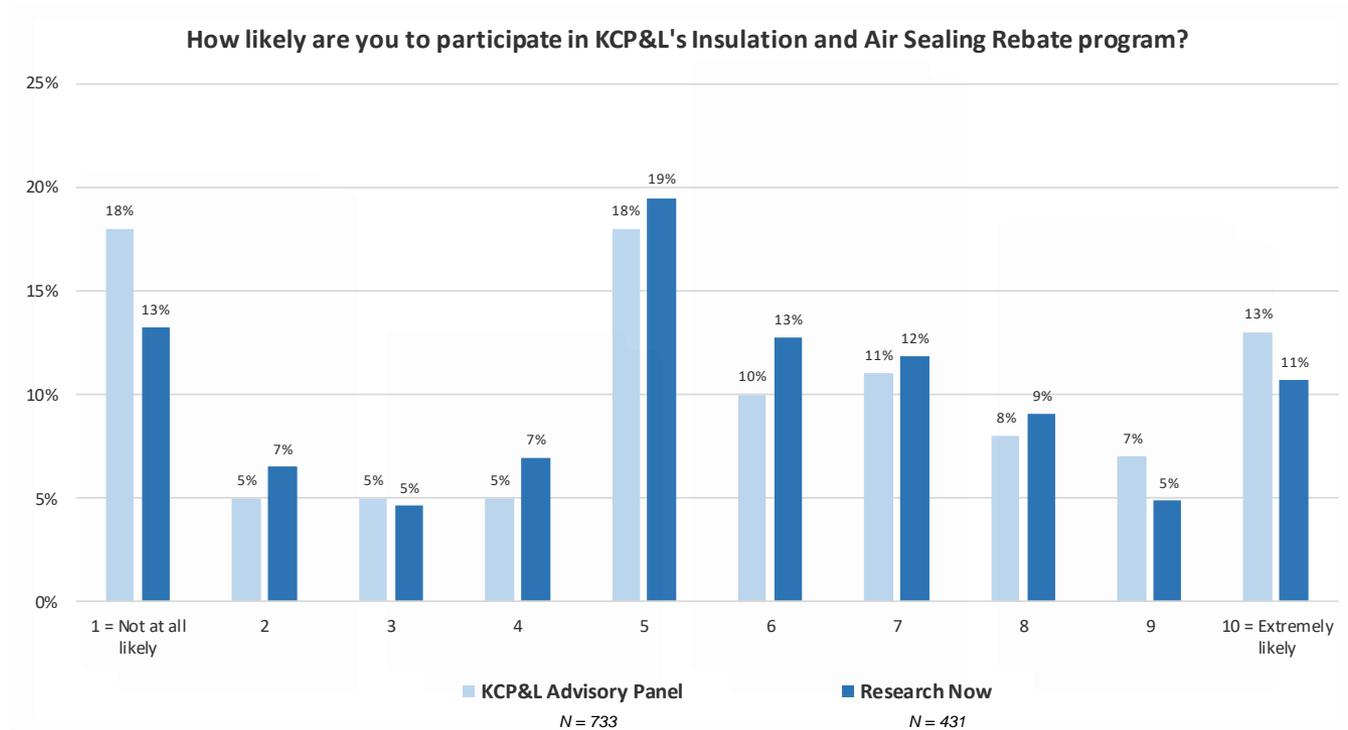
My hvac system is so new that it would be a very long time until I would need to consider	Our heat pump is good
see no advantage	Don't know what it is
Don't know what it is	don't own the system. i rent
Not the best fit for my home	I don't know what it is
Don't like them	Happy with system I gave
do not have a hvac system	Too expensive up front investment
Because I don't know what a heat pump is	Heat pumps can't provide as much heating power as a furnace.
cost	Don't know what it is
I don't know what it is.	Dont understand heat pump
\$ Inconvenience	It doesnt need fixed
Don't know	I don't know what it is or why it would be replaced
No interest	I feel the gas heat I own now is more efficient than a heat pump
Not good in extremely cold weather- there's no heat to pull out of the environment	People I know with heat pumps have had poor experience. The weather in Kansas City seems to not be well suited for heat pump performance.
Landlord detetmines	Unsure what it is
Cost savings does not make up for the initial investment	I don't replace it
Never been discussed - - just replaced HVAC system within the past 2 years	Not likely
Friend had one that operated poorly	Because I rent. So it's not my decision
I live in apt	New system recently installed
son is not satisfied with his	Cost
It's not my property & it would be my landlords decision.	Not sure what it it
I'll be moving in a few years.	Have no clue
have known others that had problems with it and were not satisfied with the way it heated the house	Not my decision
everyone i know who has a heat pump hates them	I don't know what it is
Can only use to a certain temp. Good supplement but not as A unit by itself	To reduce overall load on unit to prolong life

Reasons NOT to Replace Current HVAC System with Heat Pump

Why are you not likely to replace your current HVAC system with a Heat Pump? - continued

Too cold in this area	I'm not sure that it is as good at cooling as AC
Since I have never used one not sure how good it is compared to regular system.	Don't know what it is
Don't know what it is	My son has one and I don't think it works.
I don't know what that is	I do not like a heat pump for this area. it does not warm up the very cold air enough for my spouse and I
They are a pain to install and, compared to the cost of natural gas, do not recover the extra cost in the life of the unit.	They are inefficient
if i don't know what one is why would i buy one?	I'm used to a central furnace.
Don't believe they work as well	i dont have the authority to purchase this
Fine as si	couldn't afford it
Because I don't know what a heat pump is.	I don't like them
We just replaced a heat pump that wasnt very efficient below freezing and it isnt as energy efficient as gas.	have a new unit
runs too much	like what I have
Mine is least then 5 years old.	I prefer a gas furnace
i am not sure the advantage of a heeat pump	I have no need for it right now,rarely ever turns on anyway.
No idea what it is, how it works	Installation costs?
Don't know enough about it.	I do not know what a heat pump is
don't know enough (anything) about heat pumps and not sure how fail-safe the technology would be, or how expensive to maintain.	I don't really know if that would work well with my house
I don't know what it is	they arent as efficient as some believe them to be
DON'T KNOW MUCH ABOUT THEM	Stay in an apartment
caue I have no idea what a heat pump is	I am not up to par with heating and cooling so I would ask my contractor
Dont know what a heat pump is	I don't believe my home could even have a heat pump

Likelihood to Participate in KCP&L's Insulation and Air Sealing Rebate



Means:
 Advisory Panel 5.47
 Research Now 5.48



Reasons NOT to Participate in KCP&L's Insulation and Air Sealing Program

Why are you not likely to participate in KCP&L's Insulation/Air Sealing Rebate?

Don't need	Not sure. Would need to discuss it with my spouse
I rent	Not necessary
Really old house not sure it would help	UP FRONT MONEY
My home is relatively new and well insulated.	id have to know what it entails
Not interested	It would cost too much and I don't plan on staying in this house much longer.
new home don't need it.	Don't want to be bothered.
Old house	We have a newer home
Have a new house	Had one done couple of years ago and received rebates
already insulated	Got new insulation about 5 years ago
already said, I have extra insulation when built. All 6 inch walls with house wrap and wood and stucco and better windows	Again, I don't like letting strangers into the home unless absolutely necessary
not interested	Because I'm probably moving to Seattle
Just got new doors and windows	not going to make any of those changes in near future
Can't afford it right now	Don't need to at the moment
Too expensive	I just had brand new energy efficient windows
not enough \$	Don't want to do the inspection
Don't know	Not worth it
Have no idea what it is	insufficient brains
Guess we feel it is not necessary	Because I'm a student
Don't need additional insulation	Because I don't care
It would be my landlords decision.	I don't want to spend any money up front - my time is worth enough in the partnership
do not need it	NOOOOO MONEY!!!!!!!
Too much sealing of the house also doesn't allow gasses escape from the house such as radon	It doesnt need it
Time, installation.	Unaware
Not at all familiar with the program. Need more information	Already did it

Reasons NOT to Participate in KCP&L's Insulation and Air Sealing Program

Why are you not likely to participate in KCP&L's Insulation/Air Sealing Rebate? – continued

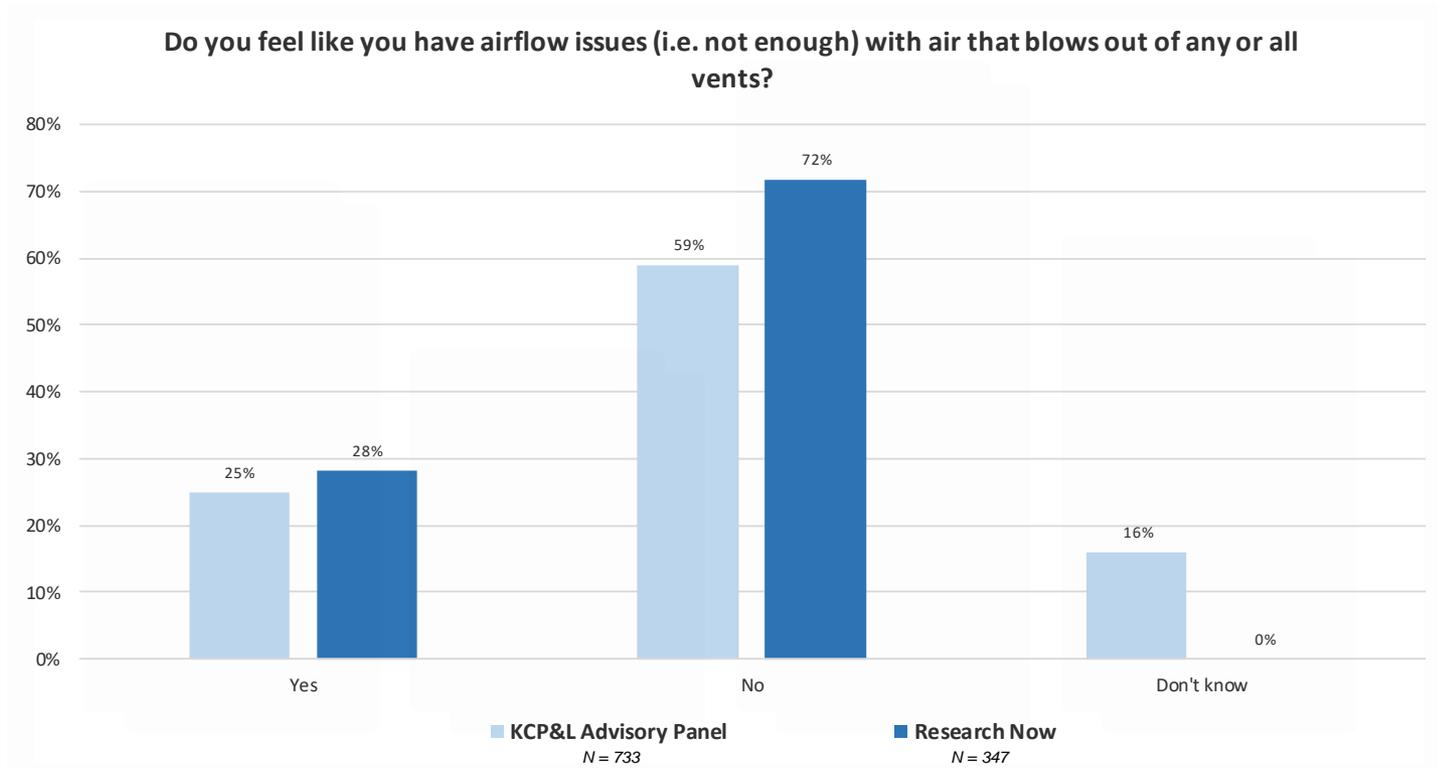
don't want an audit of current situation	Already sufficient
TOO MUCH TROUBLE	If they send me the supplies for free id do it
Not interested	Not insulating in near future
No time	I don't want strange people in my house
I already have insulation in my home.	newer home
sounds like a pain	Have no idea what it is exactly
Dont know enough	don't need to yet
Moving out of coverage area.	Don't need it
Already well insulated.	can't afford to right now--paying off medical bills and new roof.
dont need	too much work
Cheaper myself	do not want KCP&L in my house
New windows	I'm not sure the initial cost is worth the benefit
because i am renting and i can't make those kind of imp;rovement but i sure would like too	Time and money
Do I need it?	We are in a new home with very good insulation
Utilities are included in rent	My home is already insulated enough and have the best type of insulation in the walls. My windows are double pained and keep in heat.
Insulation & air sealing are already optimized.	can not afford it
not interested	I feel like my home is fine.
Possibly in the future but everything is new in my house	Don't know what this rebate is about and not sure I would be interested

Insulation and Air Sealing Information

Where do you look for information about upgrading your insulation and air sealing?



Airflow Issues



Insulation and Air Sealing Upgrades

How do you determine what upgrade to do when thinking about upgrading your insulation and/or air sealing?

Townhome management recommendation from contractor	Whatever lowers my monthly bill. Which one we'll need immediately.
Friends or family	I would have to speak to a professional. I don't know anything about insulation
When the room is the same temp as it is outside all year round	Price
I call my leasing department and they handle it	Haven't thought about it
Contacted recommendations	Ask our remodeling contractor
Google	Where leakage is.
Cost	It is determined by my landlord.
Tissue over vents and returns	Read online
where there has been an energy audit to determine air loss	Internet
The R rating I currently have.	Asking questions
not sure, haven't thought about it	online sites
windows and doors on exterior	Where the most heating and cooling is lost
I would have KCP&L do an audit	If it's not good
Would talk to my contractor	Research
Family recommendation	ask professionals
best bang for the buck	love it
research	I do what I have money for
Research	Friends
asking a professional	I would leave it up to the ones who know what they are doing.
Read about upgrades online and discuss with local experts	Family
R30+++	Do research online or ask a salesperson at a Lowe's or Home Depot
where there's a draft, cost, options	What is best.
Research & ask our contractor	haven't thought about that before
I get 3 estimates.	Price

Insulation and Air Sealing Upgrades

How do you determine what upgrade to do when thinking about upgrading your insulation and/or air sealing? – continued

Research	Check with installer
research/ask family&friends/research	Cost
Online	What I can afford
Study up on it.	Online
Friends	My husband knows
would have to have advice from hvac tech	Consult heating and cooling professionals of do KCPL study.
Size of house	I talk to the folks at KCP&L.
contractor advise	Research
rely on others	Online research
Ask my son	Recommendation
internet and home improvement stores	recommendations, research
cold areas	I know my house has little insulation
research	Local service technicians
AS I have said for the last 5 answers I RENT	Internet
when i have extra money	Haven't thought about it
Ask an expert	My door has a crack.
ask havc	Take a look at what needs fixing.
internet	What I can afford
Assist from professional	I haven't had that issue
I will look around and do my research by asking some experts	Will ask friends
Recommendation from trusted HVAC provider	from my job experience
Cost	Talk to specialists
Square footage of house	Contact contractor
How much money I have	whatever will save me money
From kcpl	Try to seal leaks first
feeling drafts in the house	Price

Insulation and Air Sealing Upgrades

How do you determine what upgrade to do when thinking about upgrading your insulation and/or air sealing? – continued

Research on internet	K C Chiefs
Ask a relative.	Repair person
Analysts recommendations	online and by networking
Online research	Most bang for our buck - where do we 1) get the fastest return on investment, and 2) feel the most improvement in our comfort level/
Property owner decides	I would think to clean all the vents
Depends on how old your your stuff is and if a lot of sure comes thru	the internet
contractors advise	Don't need it
internet	ask around
What my apartment says	Cold spots and drafts
replace vents and insulation	No money!!!!
internet	Research online
Internet research	Cost and efficiency
Recommendation of experts	Talking to someone at homedepot
Ask contractors	Need fans in the cooling
When we have funds saved up.	Check around
Would have to research it	Reviews, research and conversations with family
Online research	KCPL experts will know what to do
talk to friends	Talk with a professional
contractor	I am dependent upon the professional I hire. I have little background in home repairs.
Reading, consulting with contractors.	What seems more up to date
contractor	Heat only
research	My husband
Talk with someone.	Cheapest first
Ask the landlord	Online



Insulation and Air Sealing Upgrades

How do you determine what upgrade to do when thinking about upgrading your insulation and/or air sealing? – continued

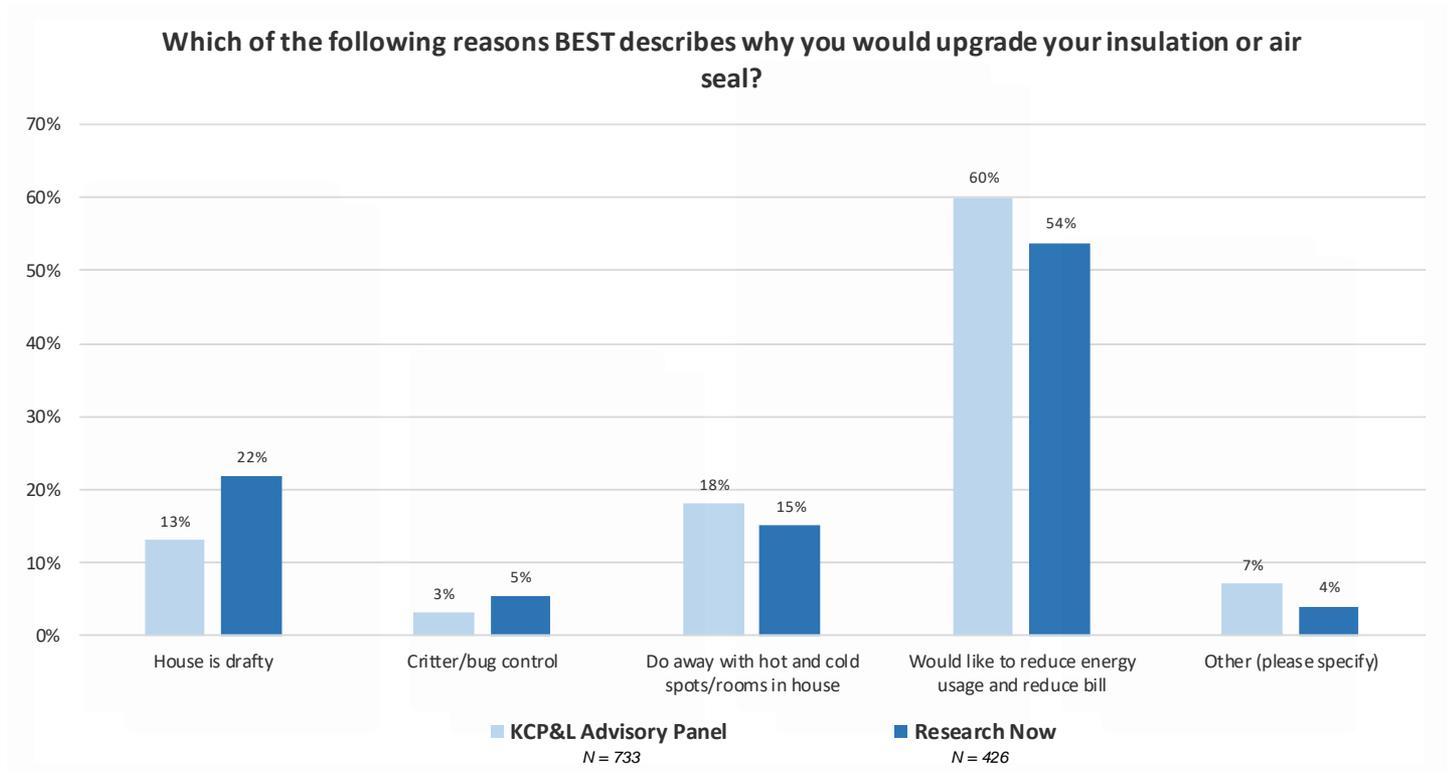
cost	If my heating bill go up and I feel a draft coming through window
i just know this isn't rocket science a draft means you need to insulate	Hire a professional
Havent, live in a apartment	to go to a professional. My handyman will tell me.
I have no idea.	Internet
knowlege	Applicators
By looking and testing	cost
Recommendations HVAC contractor.	Have no clue
Research online	Where there is a perceived problem in our insulation
Professional	Internet
Just my experience	Online info
I let my husband make that decision	Professional quotes
Have never had this done so I would assume it b e determined by air flow.	check them out myself
Online research	We usually have a little higher number than recommended.
Price	Recommendations per issue
Work with consultant	When it's noticeably cost inefficient
I would ask a professional.	Ask around and online
Internet research	windows
I pay attention to my house for what it needs and then watch carefully the ads and specials to plan a time to fix problems.	Take advise from a contractor
Cheapest way to fix it	Talk to people at home builder stored
talking with others and looking online	Cost
i have no clue	survey
Easy of purchasing, warranted, how well the insulation is	Professional
Google	talking to a sales man
Door seals and drafts	KCPL
If I need it.	cost, need

Insulation and Air Sealing Upgrades

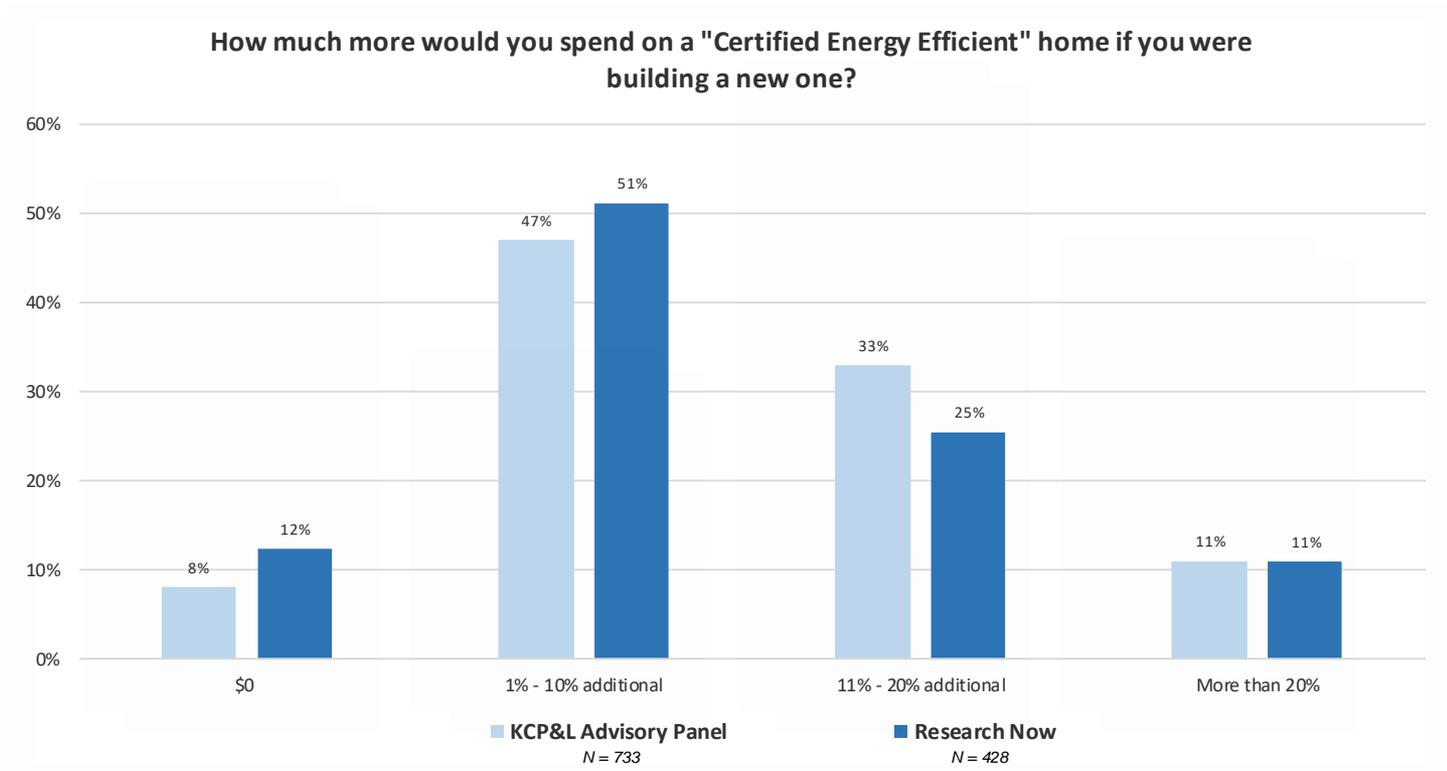
How do you determine what upgrade to do when thinking about upgrading your insulation and/or air sealing? – continued

probably would use an inspection	Where the most outside air comes in the house.
Look at problem and determine best solution.	may need help from experts
Research	Word of mouth.
Researching or asking maintenance what would be easier	The temp of house
Too hot or cold	Check with people I know who do that work.
advice from family	Comfort
see where drafts are in the house and correct them	TV commercials
What a specialist recommends	Reading online
Kcpl tech	Gauge which rooms are drafty
Room temperature variation throughout the house.	Research
HVAC professional recommendation	My landlord makes the decision
By asking KCP&L what the recommend	The pricing and payment options
ask reliable p;eople to help me	Advise from professional
Ask experts.	research
heating rep	The comfort level in the house
I've already replaced my windows with high quality windows. I next plan to replace my storm doors.	I would consider replacing doors or Windows.
I would rely on the advice of a technician sent specifically to check on it.	Best quality
Have learned over the years; pretty much know what to do.	Energy efficiency and eco friendly
Call someone	Fix areas that have old insulation or none.
Research	Contractor recommendations
Talk with a local hardware company	Research the market
Drafts that can be physically felt	Check the duct work
Professional recommendation	What rooms I use most often
i let someone else decide that	ask my son
I would probably do and a lot of online research on the matter	drafts are bad if there are no drafts and my bill is low i am good

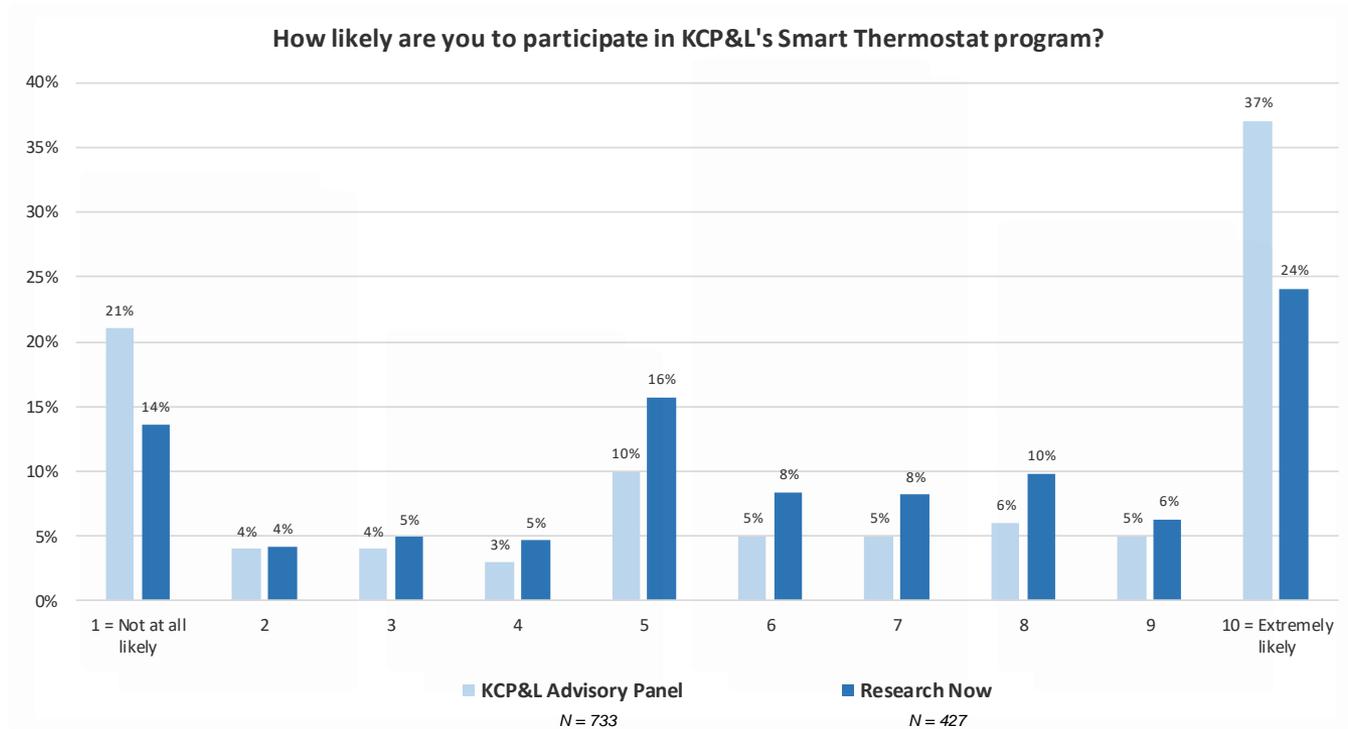
Reasons to Upgrade Insulation and Air Sealing



Certified Energy Efficient Home Investment



Likelihood to Participate in KCP&L's Smart Thermostat Program



Means:
 Advisory Panel 6.33
 Research Now 6.19

Reasons NOT to Participate in KCP&L's Smart Thermostat Program

Why are you not likely to participate in KCP&L's Smart Thermostat program?

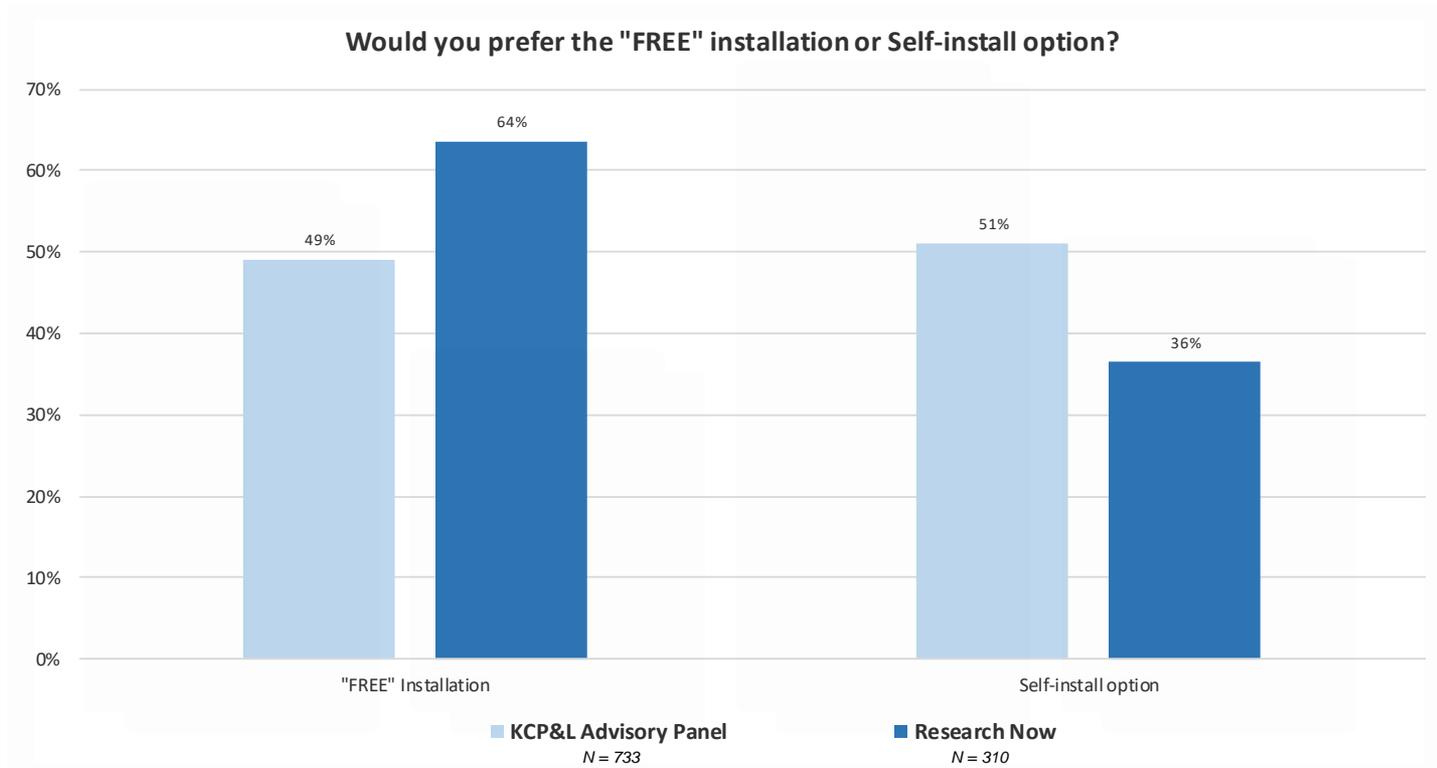
Make to much money	Controls
Already have smart thermostat	I do not feel comfortable with that technology controlling my house
I want to control myself	Don't want KCP&L to have control of my thermostat
I have animals that I leave inside during the summer and they need air because I have a programmable thermostat and I don't want to have an internet connection for a thermostat.	Have a new thermostat
If I were working and gone during the day, I might consider it. But, I'm retired and home all day. I adjust the temperature myself to assure my optimum comfort level.	I don't want someone else having control over my decisions in my house.
I already have a smart thermostat	not my style
We keep our thermostat at the same temperature all the time	Have programmable already
don't think it will work with my system	has no appeal to a genius like me
Don't care to have it on my phone	Just replaced mine
already have smart thermostat	I don't know my thermostat works fine
I am disabled and am home almost all of the time. I need to be able to adjust my own temperature settings.	I want to keep control of my thermostat settings.
hve had "smart thermostat" before and did not like it. I feel the constant comfortable setting stay where it is unless we were gone for a long period.	No time no money
It is no big chore to regulate a manual thermostat for us.	Expensive
don't have hvac, no furnace or a/c unit	Air drafts need to b fixed
dont trust	Not in charge of the decision
don't want anything smart	Don't want that type of monitoring
Not necessary with our lifestyle	Because I rent
Rebate is too small	Not interested
I am at home all day and can control the temperature	Money
would not use it	Not planning to change
Not necessary	i want to control temp
don't want a company controlling my heating and ac needs	Not enough information

Reasons NOT to Participate in KCP&L's Smart Thermostat Program

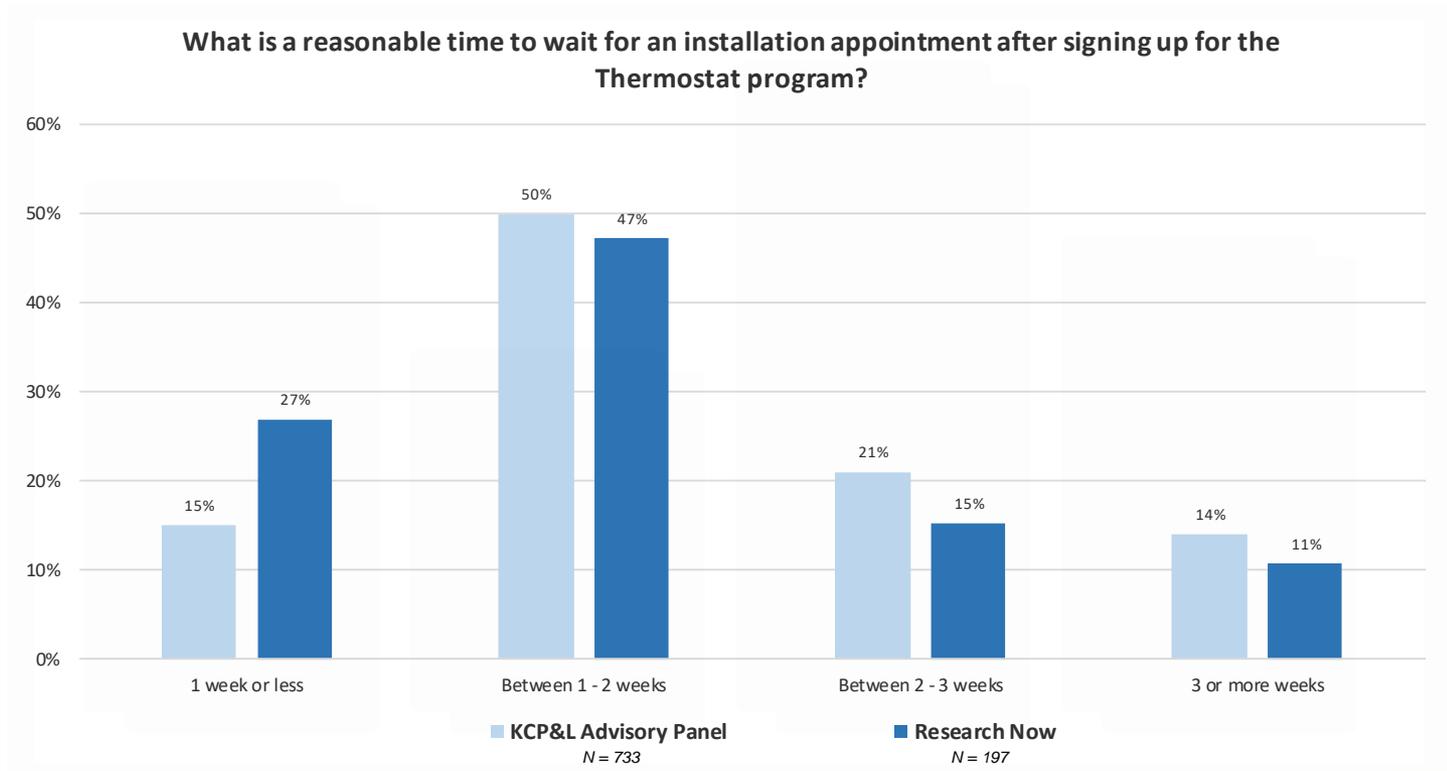
Why are you not likely to participate in KCP&L's Smart Thermostat program? – continued

No time	I don't want someone else controlling my thermostat
Lower my bills	Already have a good thermostat
Just installed a new thermostat that we control with a phone app.	I just keep the house cooler in winter, and use fans in the summer.
I don't like it	My house is too drafty and when it's cold I want it at my temp
I have a smart thermostat already	don't want my thermostat controlled by KCPL
	Heard that KCP&L has control over your heat....you lose the option to set it up or down....No thanks
Have a new one already	
I do not want the electric company controlling my thermostat. I like my house cool.	already have programmable thermostat
I do not want others having access to my home or information	KCP&L doesn't need to know everything
not sure what it is	I do not want KCP&L to have control of my thermostat
I have an excellent programmable thermostat already. I prefer to control it myself.	Not sure what it is
Already have a programmable thermostat that we like. DON'T want one that KCP&L or anyone else can access and adjust.	they said i could not get one
Would lose control	Have a new one only a couple years old it is amazing
Not necessary, don't want Big Brother monitoring usage	Not recommended with our heat pump system.
Not interested	Not sure what it is
i know nothing about it.. would have to know more	have one I can set for different temps during the day
I already have a programmable thermostat	I don't want KCPL to control my temps

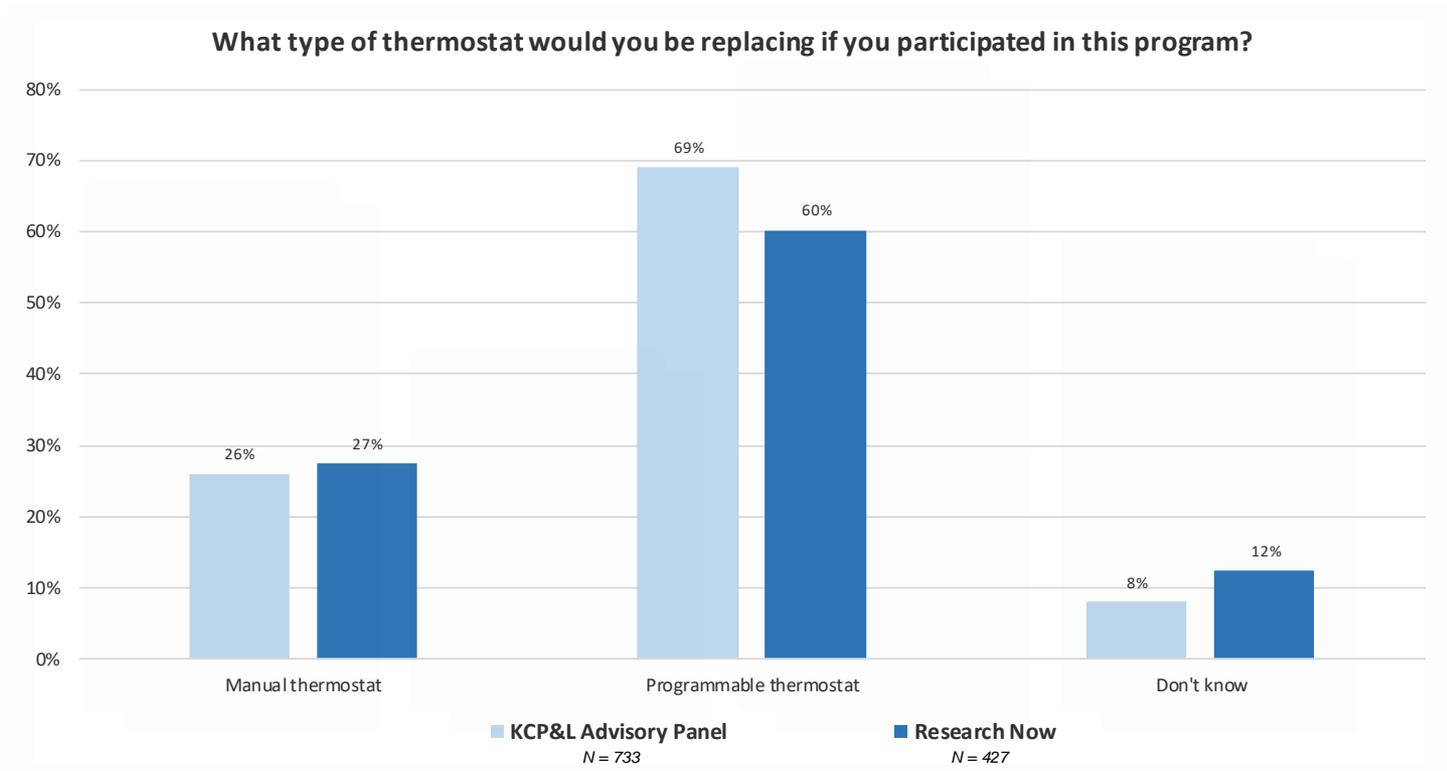
FREE Installation vs. Self-Install



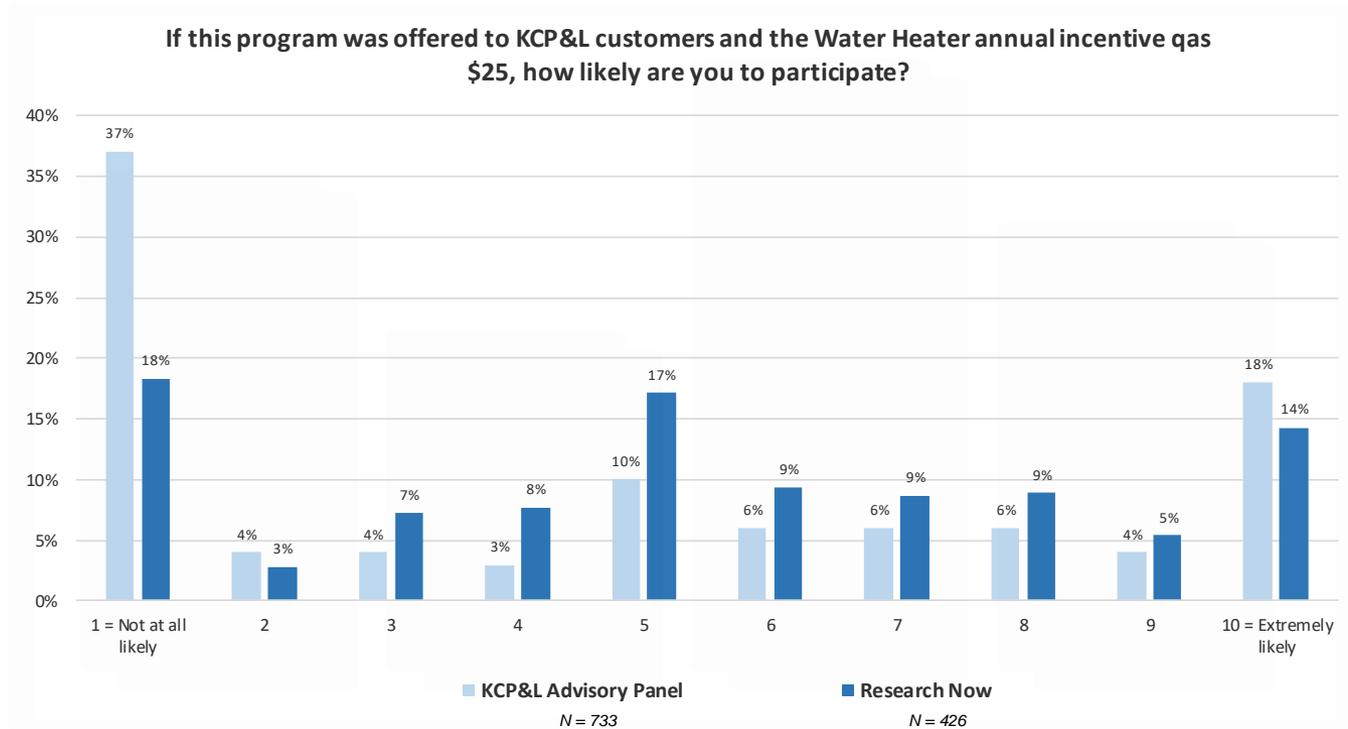
Reasonable Wait Time for Thermostat Installation



Type of Thermostat Being Replaced



Likelihood to Participate in Water Heater Switch



Means:
 Advisory Panel 4.70
 Research Now 5.43



Reasons NOT to Participate in Water Heater Switch

Why are you not likely to participate in KCP&L's Water Heater Switch program?

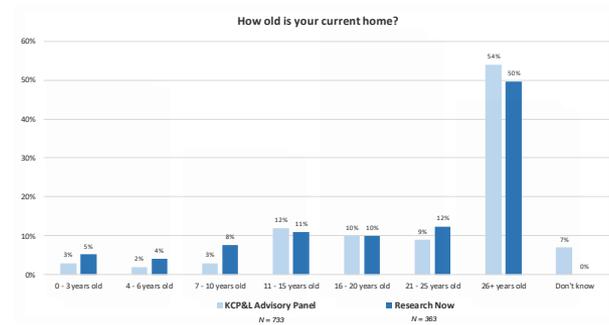
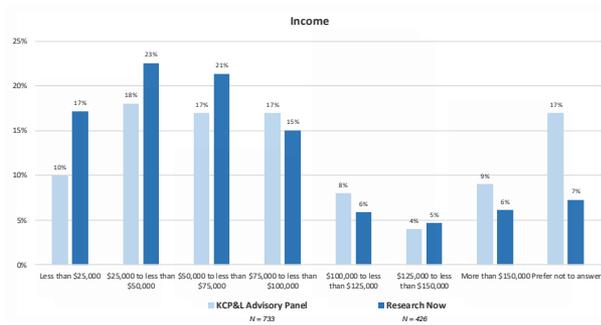
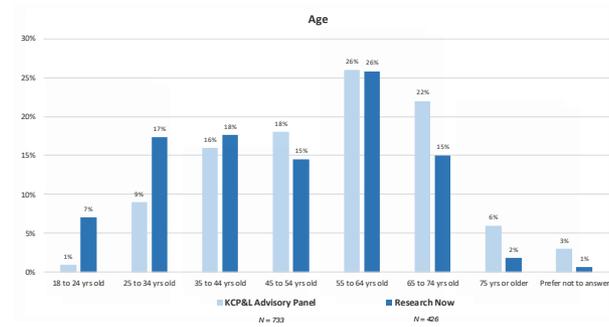
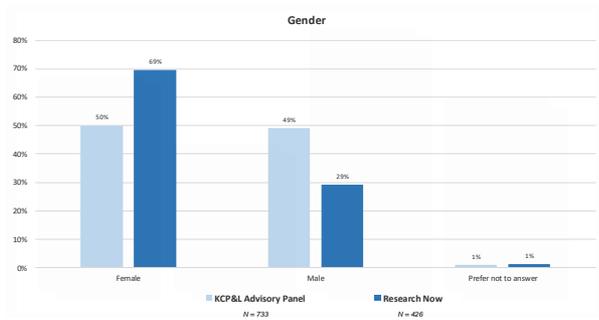
I want to be able to control my system that would be up to the landlord	Gas water heater We have a gas water heater
I don't think my leasing department would be on board with this, the thermostat yes I think they would but I am not sure about this	Have a tankless water heater
Have gas	We are not home much and need the water when we are home
Hot water is necessary for so many daily things	Not enough credit
Gas water heater	have gas water heater
Gas water heater	The incentives are not that impressive
I have propane water heaters	Just bought a new hot water heater
Same reason as previously stated. I'm home all day. I want it when I feel that its necessary	I need access to hot water at all times
don't want	Gas water heater
don't like the idea of someone else controlling things in my home	They'd have access to control it anytime
Rebate isn't enough to make a difference.	Gas water heater
Have gas water heater	Just not liking it
I still don't understand	I have a new water heater
Don't know enough	A \$25 incentive is not enough of a benefit for the chance of lower water temperature when hot is needed or desired.
I have a gas water heater	Only \$25 a year?!? That's a rip off
gas water heater	I don't want someone else dictating what I can and can't do in my own house.
hassle	Not sure how that would effect my current water heater, makes me nervous to think it could malfunction completly
I don't have a electric water tank	&25 doesn't pay for it
have a gas hot water heater	How in the hell long does this survey run???
gas water heater	Happy with what li, have
Don't want it. \$25 is no money in trade for someone having their hand on a switch on my stuff.	Don't feel like I need to

Reasons NOT to Participate in Water Heater Switch

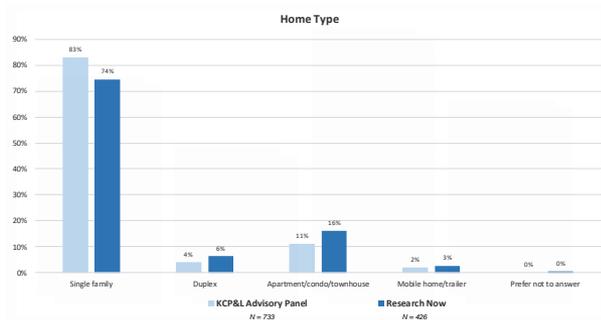
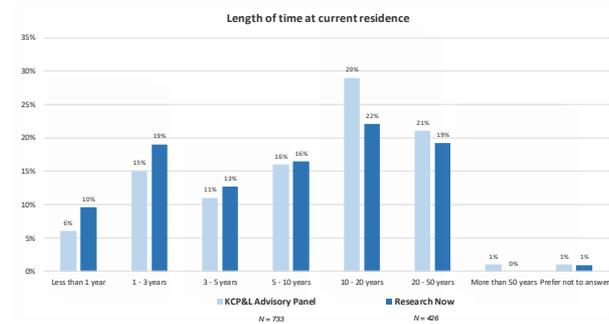
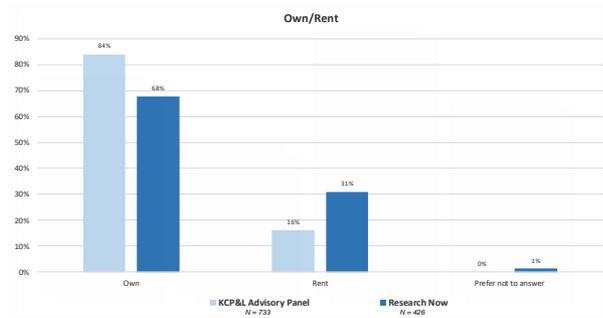
Why are you not likely to participate in KCP&L's Water Heater Switch program? – continued

already have a switch on water heater	Don't like to give up control of my water heater.
Seems like an invasion of privacy and not worth the money to participate in program.	No money no time
Too set in my ways	Not the decision maker
not enough \$	We just got our water heater
Not interested	Too low incentive
25 bucks.. thats not enough	Only 25 annually. How about monthly
Gas water heater	Not likely
Rebate too small	Water heater is gas, not electric.
I have a gas water heater	I have a gas water heater
want to control myself	Not really worth it
if they shut down my water heater while i am showering someone might get killed	
It's difficult to get to our water heater	I'm not sure if I would or not
I am just not sure we need that and if we had it installed I would expect more than \$25 if I was stuck taking cold showers because of my family size	Water heater is gas
LIKE THE WAY IT IS	As long as I pay my bill, I don't want anyone else in control of my water heater
Want to control my own water heater.	Too much effort
I do not want anyone else in control of my water heater	I don't have an electric water heater
I don't like messing with my water heater	gas water heater
I am about to change to a tankless water heater, so a switch is not needed.	not needed
Not interested in this	Our current system seems to be working well.
	I love hot showers and we barely have enough hot water as it is
I don't want my switch controlled wirelessly.	Because we have people here that work at different time and need hot showers
Not interested	I would not like KCP&L to have access to my water heater
i want warm water when i need it i would hate a cold shower in the winter when water temps are very cold	No one's gonna be touching my water heater. That's not right. I would never agree to that no matter how much of a discount or money I'd get.

Demographics



Demographics



Appendix

What would you expect in return from KCP&L for reducing your usage during the event?

Nothing	Savings	lower prices
savings	Lower bill	A lower bill
Nothing	Cheaper bill.	Nothing
reduction in rates	A discount on the bill.	I would like a reduction in my bill
Discount	lower rates	Being a satisfied customer
lowering my bill	Nothing	Nothing. It is the socially responsible thing to do to assist a public utility and keep power available during such times.
Expect a lower bill, don't understand why for the tiny place I live my bill is so high especially during the summer!	savings	Maybe a Thank you
Nothing	discount/credit	Thank you so much
Lower bill	Rebate	I don't know
Discount	Lower rate	Cash back
Nothing	Lower bills	Discount
Not sure	Discounted bill	Rate cut
Lower bill	Rebate	A credit
Lower bill	No	Discount
Reduced rates	Making sure the power stays on	\$
improved service-no outages not related to storms	continued good and reliable service	Money
Lower electric rate.	n/a	Nothing
nothing	Lower bill	A lower bill
Lower bill	Discount on monthly bill	Ability to override KCP&L action in unusual circumstances-for instance, overriding a thermostat adjustment if there are unusual numbers of guests expected.
great service	Level the temperature gauge set to one number.	Bill discount
a Thank You	Credit	Bill credit
N/A	Account credit	Bill savings
a discount on my bill	Nothing	Atleast an acknowledgment that I participated. Maybe a credit of some kind
Credit on next bill-But- I am always vigilant about reducing my energy use so not sure if joining this program would lessen what I already use in terms of energy usage.	Nothing I like helping others	a discount
Rebate on monthly billing.	lower monthley bills	Rebates
Reduced rates	for my bill to be lower	I don't know
lower rates	don't know	bill credit
Reduce bill	Rebate	rate reduction
reduced bill	Nothing. Electric company doesn't give me a break!	Lower rate
unsure	Less outages	Have no clue
Small credit	I have k idea	Lower bill
credit toward payment	Less money paid	Great that

Appendix

What would you expect in return from KCP&L for reducing your usage during the event? - *continued*

Credit on my bill	a discount	Bill credits
just want to help	Discount on bill	A slight rate discount
price break	Discount	Large discount on my monthly bill
	I would not expect anything in return. I would be willing to inconvenience myself slightly for the betterment of everyone and would know that I would also be reducing my bill by a little bit.	
Rebate		Lower bill
Discounted bill	Hold off on rate increases.	A cheaper bill
A lower Rate	money off next bill	Lower bill
	I guess \$1m is out of the question but a % decrease in bill wouldn't hurt.	discount
Nothing		
A thank you, and maybe a statement showing how reducing your usage has helped.	hhh	Nothing
Refund	Lower bill payment	I would expect a certain time period with no raising of the rates. some type of financial rebate on the next bill for each day they declared it a day like that
Low costs	Nothing, I would have no problem doing it	
Discount off my bill	Lower utility bill	not sure
Continued good service.	Cheaper bill	Discounted bill or statement credit
Nothing	Small discount on bill	Lower bill
nothing	Incentives, bill discount	To be constant
I'm not sure	No	A piece of candy
rate reduction	LOWER BILL	Nothing
Lower rates	perhaps a small gift.. like a percentage off my bill	n/a
credit on electric bill	Nothing	My thermostat would not go up or down
		Some kind of reassurance my family will not all die of the heat. Help to figure out how to cool my house without using so much electricity.
Lower avg bill	A discount or incentive	
None	Nothing.	a small discount
Nothing	lower cost	LED light bulbs free or reduced cost
lower rate	Rebate	Enhanced customer service
lower price	n/a	Small reduction on bill, like \$25-50.
Money	Lower rates	Unsure
lower charge	Lower cost or rebates	Continued service
I am unsure	Lower rates	lower rates
Lower rate incentives	A discount	Lower rates during those months
lower pricing	Lower bill	Lower price
Money	Rebate	lower rates
none	Reduced bill.	yes
nothing	Discounts	with cheaper rates mean less usage
rebate or discount	Reduced cost	Thanks
Lower bills	Lowered rates or rebates.	lower prices

Appendix

What would you expect in return from KCP&L for reducing your usage during the event? - *continued*

REDUCTION OF MY ELECTRIC BILL	Lower rates	Credit to my account equal to the amount below below average usage for the time period.
A discount on my bill	A lower bill.	Discount?
Nothing	not sure	Reduction in monthly billing
no brown outs or outages	Nothing	nothing
cheaper bill	ldk	a discount
lower fee	A cheaper bill	wouldn't expect anything
Nothing	Lower rates	a discount
a lower electric bill nothing else	nothing	Discount on your bill.
Bill discounts	Additional rebates on current bill	Monetary reward
Nothing	Rebate, credit	Cut rate
Nothing	Money or discount	reducing their rates
No rate increase	A discount	Cash back
To reduce my bill	Lower prices	Good service
Nothing	nothing really	Discount
lower cost of usage	love it	nothing
Nothing by cuttingback I would be lowering my bill anyway	A small rebate on that months rent	Lowering or maintaining current rates.
A discount on my utility bill.	Lower bill	Credit to my account
Rate reductions	iuytre	bill reduvion
discount	I am not sure?	Less cost
Lowered rates	cut rate on those days	Lower bill
Deduction in bill	Lower payments	Some sort of perk would be nice..
Nothing	A lower bill	N/A
Lower bill	Lower rates for those days	Savings
A cut of my bill for the inconvenience	cash incentives	bill credit
nothing	Lower interest rates	Don't know
reduced bill	Nothing	better rates
lower bill	Nothing	Don't known
A bill reduction	Nothing	Cost saving
annual incentive	Reduce our rate for the time we reduce usage	A reduction in my bill beyond just from reducing my usage
Consistent service	Discount	I would sue Kcp&l suppose I needed it because for a cpap machine or shower for hot water. I should pay less on my bill if they did that.
\$	Nothing	Price break of some sort
None	Money discount	Lowering the electricity costs on those days
A discount on rates.	Nothing	Bill discount
a discount	ldk	Bill credits
Cheaper bill	Discount	Cheaper bill
Nothing	Lower rate	lower my rates in the winter
Lower cost	A credit towards my bill.	Some type of credit.

Appendix

What would you expect in return from KCP&L for reducing your usage during the event? - *continued*

rate reduction	Lower cost for usage during the events; sufficient notification	I would not expect anything but an acknowledgement
Free thermostat	Nothing. It's to help everybody out and stop brown outs.	A rebate
Power remaining on	Nothing	Reduction in electricity rates
Nothing	Discounted rates	discount
Lower bill	A deduction/credit on my bill	A credit or a discount during the event or the next bill
cheaper prices	lower bill	test
comfortable temps	Nothing	Reduced rates
discounts	nothing	lower bill
rebate	Reliable electric service	Cheaper rates
Lower electric bill	A price reduction for that period.	Cheaper bill
a discount	Discounts	Nothing . Just love to help.
Nothing	reduced rate or bill credit	Not really sure
Discount on bill	Discount in next bill	Money off my bill
nothing	Yes	Reduced billing
discount on bill	unsure	Something off the bill
I would like them to also reduce my bill, for complying with the request.	Reduced costs for energy usage at night time hrs	Gift Card or rebate on another month's bill
small discount	nothing	Lower my bill
a decent discount on my bill	Nothing	A little off my bill
Just keep pledge to work on handling and predicting capacity use and solutions to them.	not sure	A decrease in price
Continued lower energy bills.	Nothing	nothing
Payment secrease	Small discount towards future bill of choice.	Fewer outages
Smaller bill	discount on bill	Saving more money
Much lower rates	Nothing	my usage is already low. so, a lot
I would expect for them to find a solution and make sure the power doesn't go out.	A small dip in my bill	A discount.
Hopefully not to have brown outs or loose elec. altogether.	Free usage for a month	Discount on future bill
Bill cuts	Discount	Percentage of bill taken care of
reduction in bill	nothing	To just have air conditioning in my home.
A credit next month	fewer rate increases	lower rate incentive
Lower cost	I don't care	to advise of higher use
Make sure I'm energy efficient,	A discounted rate or a refund	A month free or discount on light bulbs or something else we can use to be more energy perffered
Lower bill	Lower rates...or discounts on the winter months	Possibly a coupon or even a thank you would be acceptable
I would like a discount on my bill or many an entry into a contest.	lower our rates for the time period	
Nothing	Maybe a bill credit if I reduce usage throughout the entire event.	I would expect a credit on my bill for each hour I turned down/up my thermostat.
%off bill	Lots of discount	Credit on my bill
a huge reduction in bill!	Monetary discounts and incentive payments.	lower rates

MEEIA III
Opt Out
Customer Research

December 2017

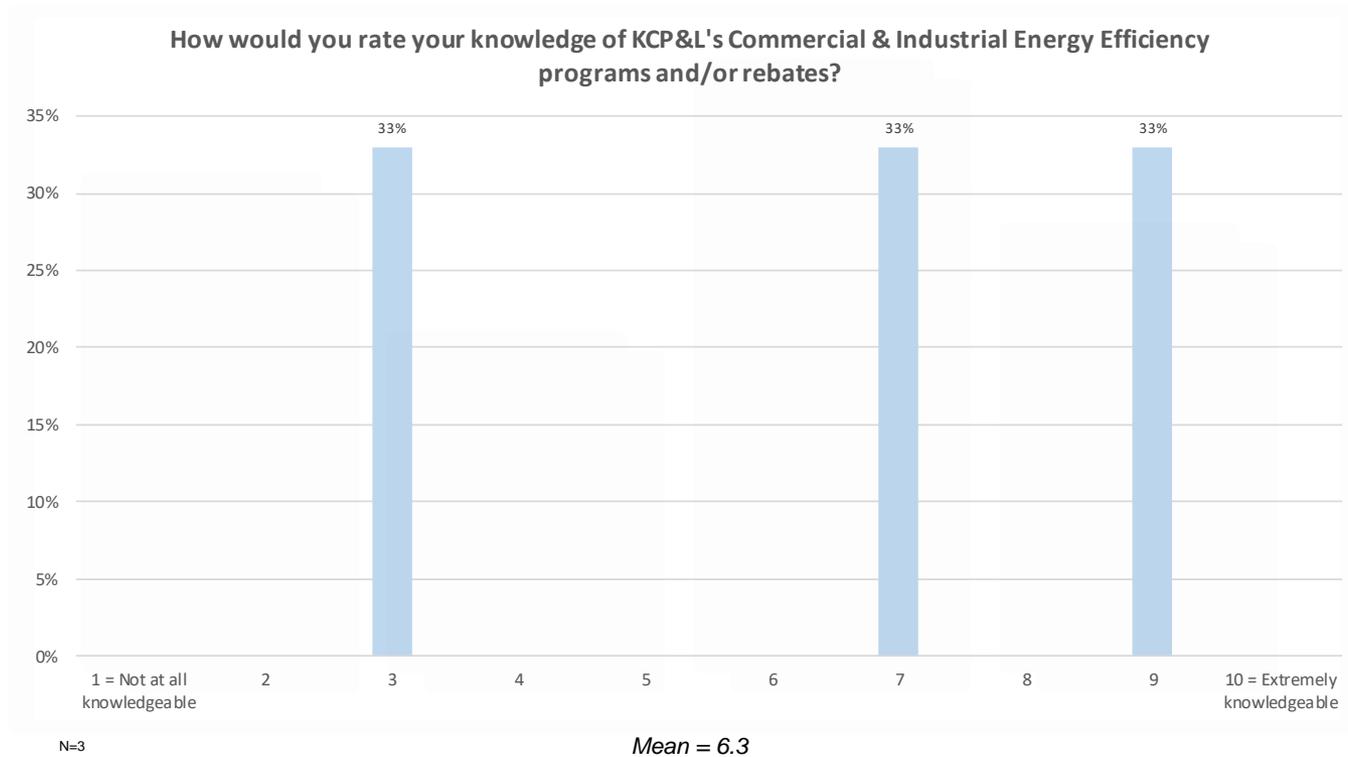
Note: Caution Small Sample Size



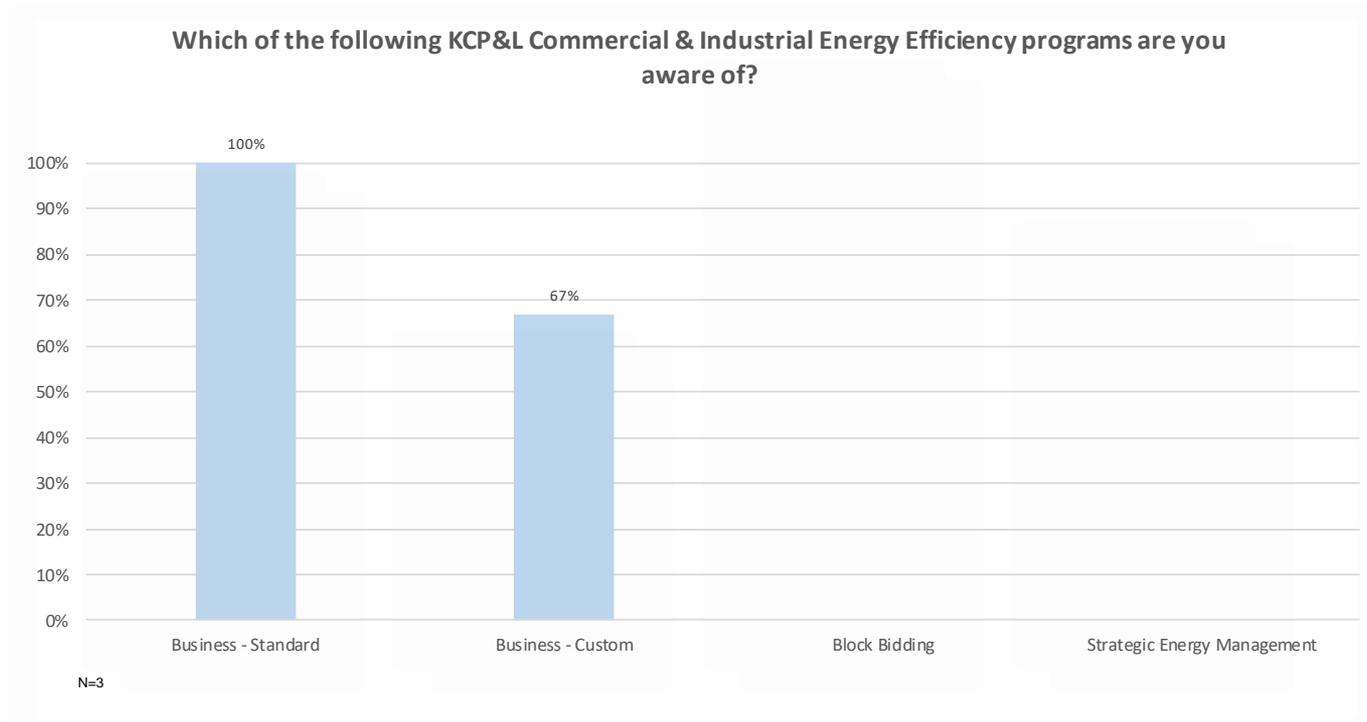
Summary of Findings

- Opt Out customers are not aware of all the KCP&L Energy Efficiency programs offered
- Each company that has Opted Out have different reasons for not participating such as costs, lack of resources to manage project, and past participation.
- One of the companies does participate in Energy Efficiency in other markets to lower cost but they depend upon vendors to provide energy efficient equipment
- One company indicated that it would require “More than 50%” break even ratio to participate in KCP&L’s programs
- Corporate Efficiency Objectives is the most common element besides cost and rebates in determining if they participate in utility programs
- The decision to Opt Out is a collaborative process between local and corporate offices even if it is done out of the corporate office
- Offering KCP&L’s Energy Efficiency programs like a Power Purchase Agreement for renewables for energy offset is something that should be further explored
- Those surveyed feel like there is still opportunity to make their companies more energy efficient

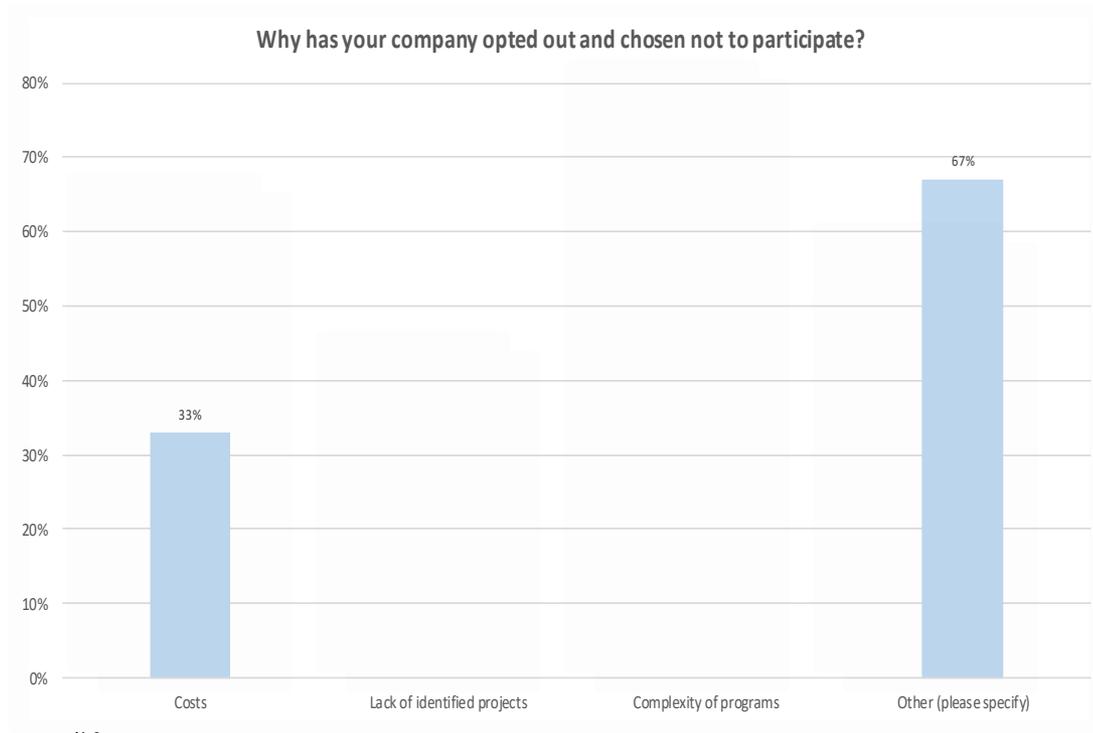
Knowledge of KCP&L's Commercial & Industrial Energy Efficiency Programs



Awareness of KCP&L's Commercial & Industrial Energy Efficiency Programs

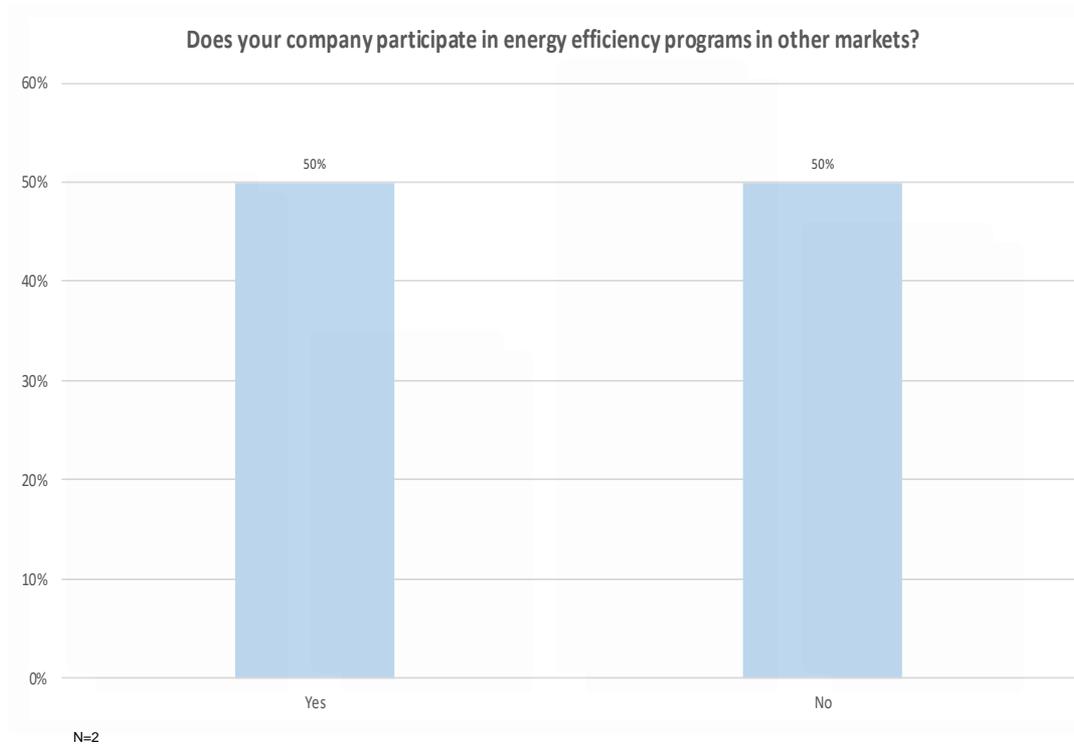


Reasons for Opting Out



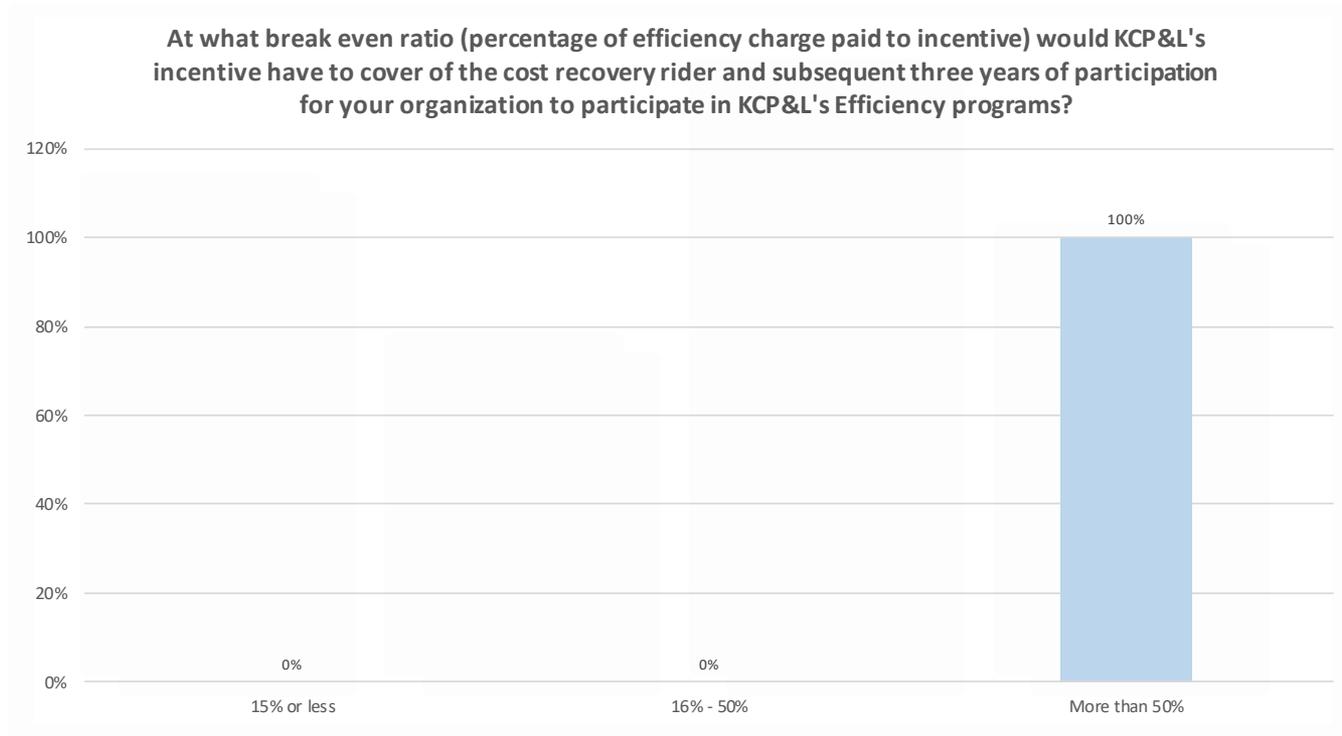
- Other (please specify):
- *We have participated in the past*
 - *Insufficient resources to manage project*

Energy Efficiency Participation in Other Markets



- If yes, please explain why?
- *To lower costs*
 - *We rely on our vendors to provide energy efficient equipment*

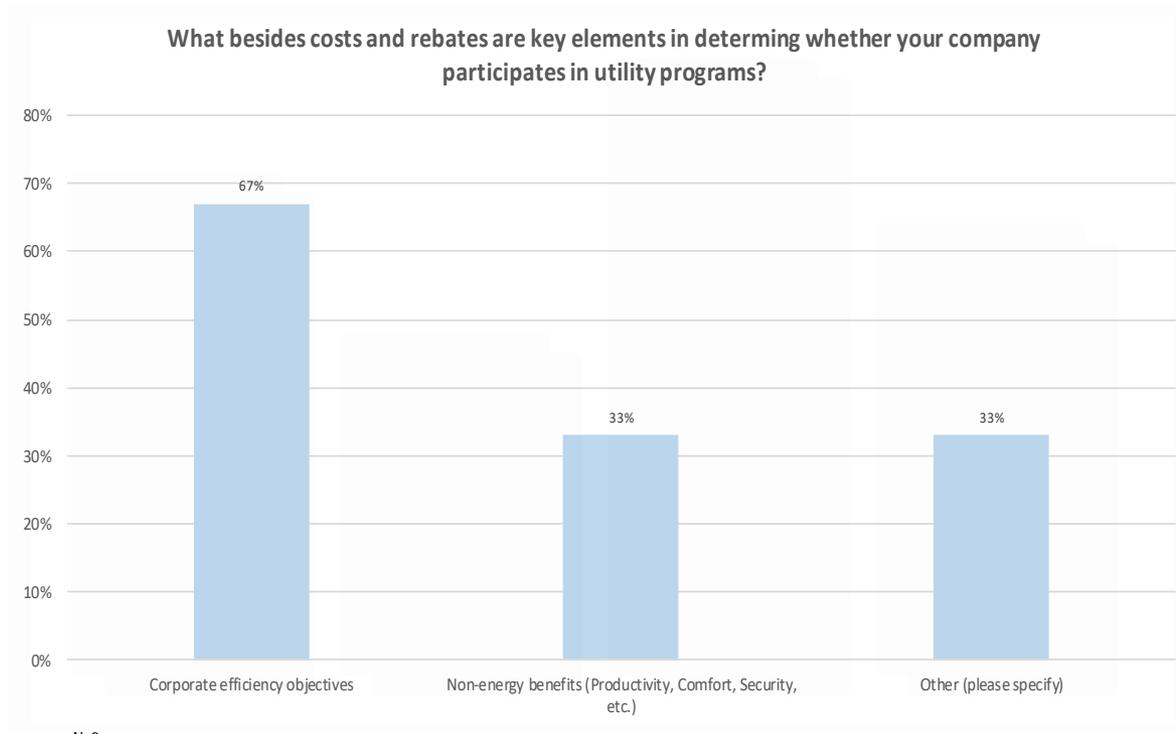
Break Even Ratios



N=1



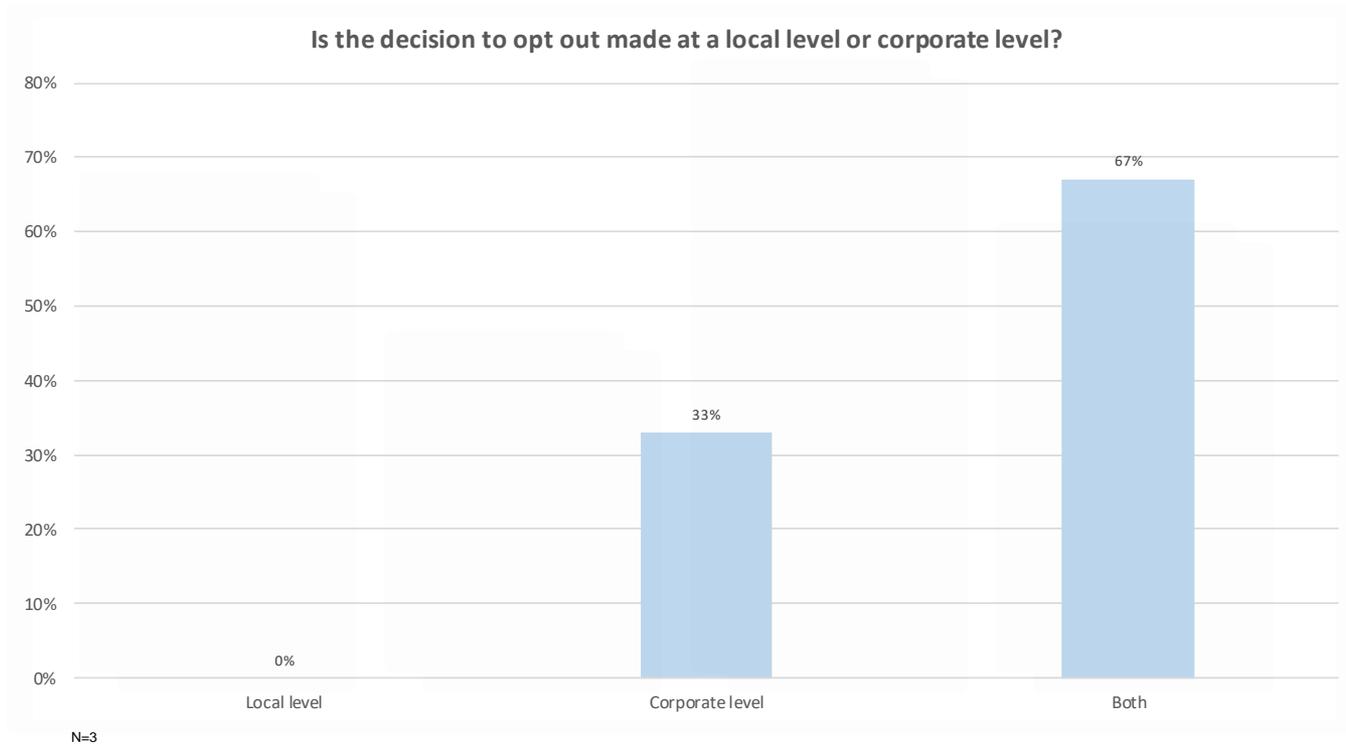
Key Elements for Energy Efficiency Participation



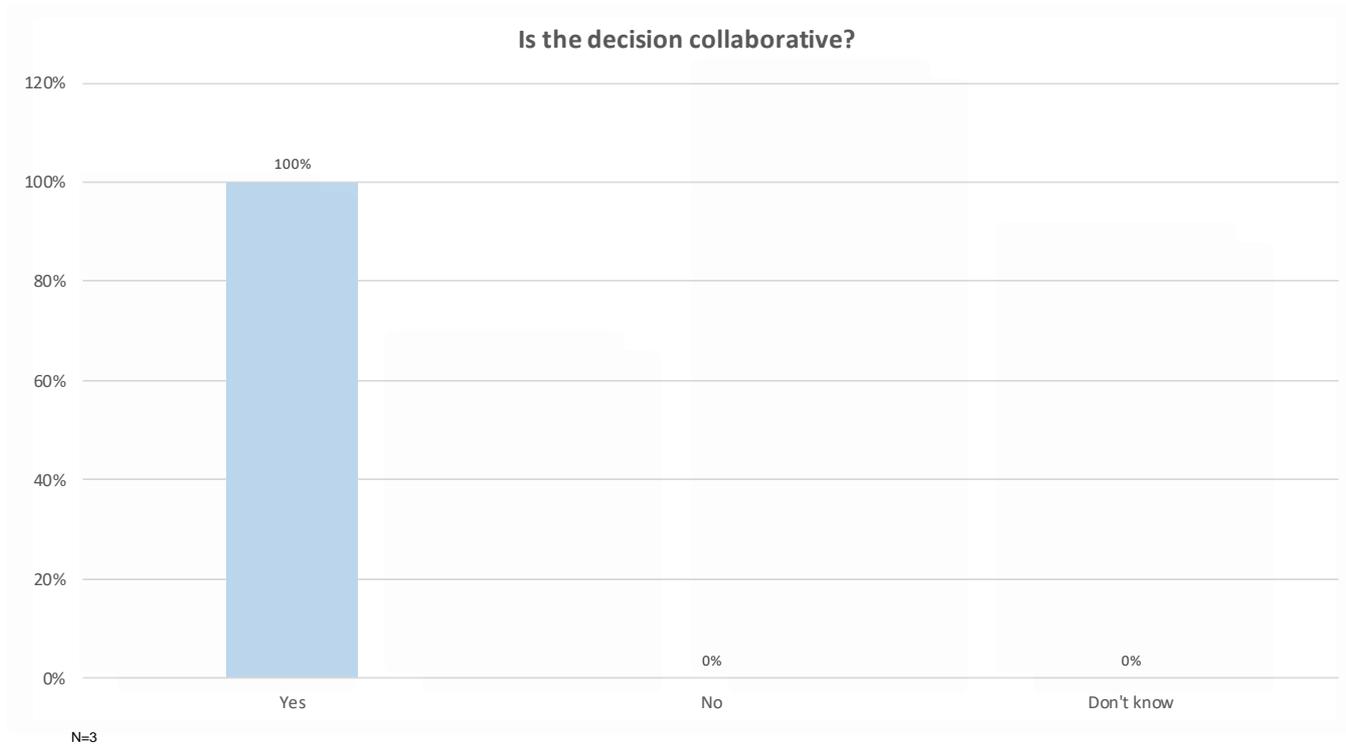
Other (please specify):

- Resources to participate

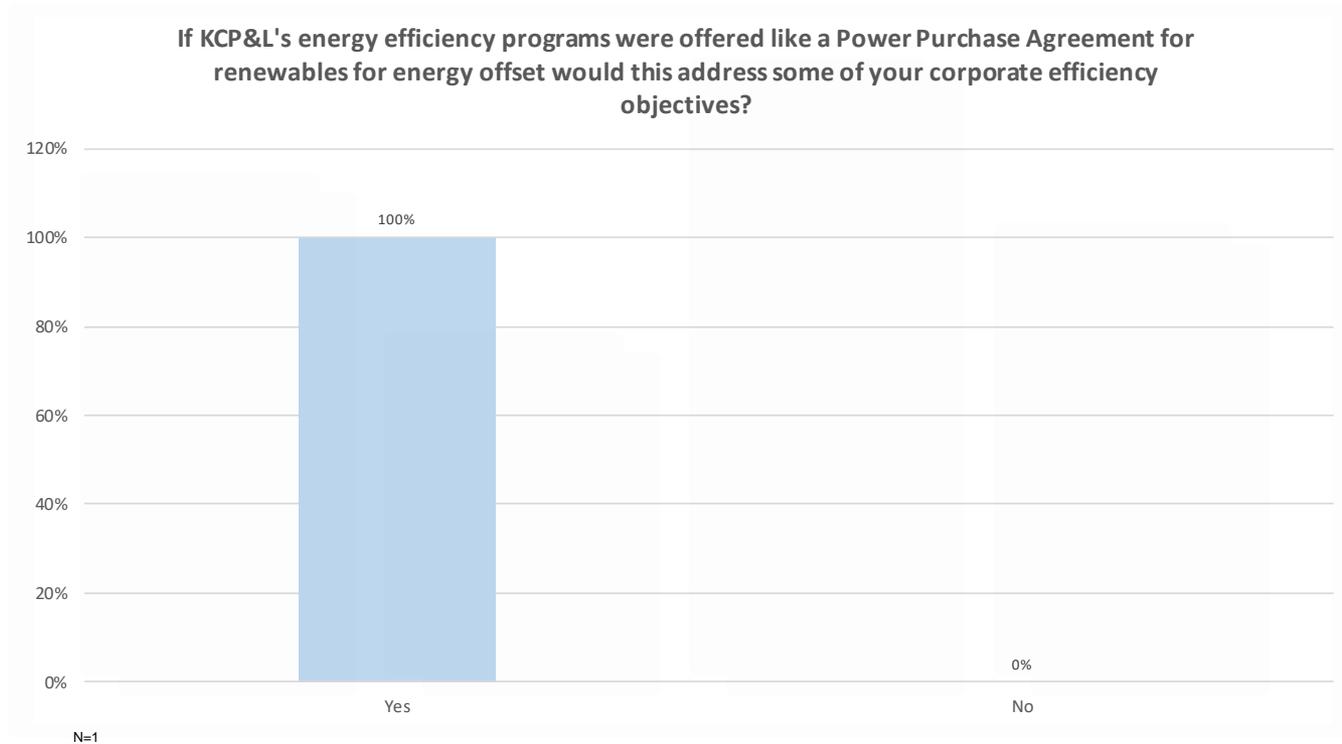
Opt Out Decision



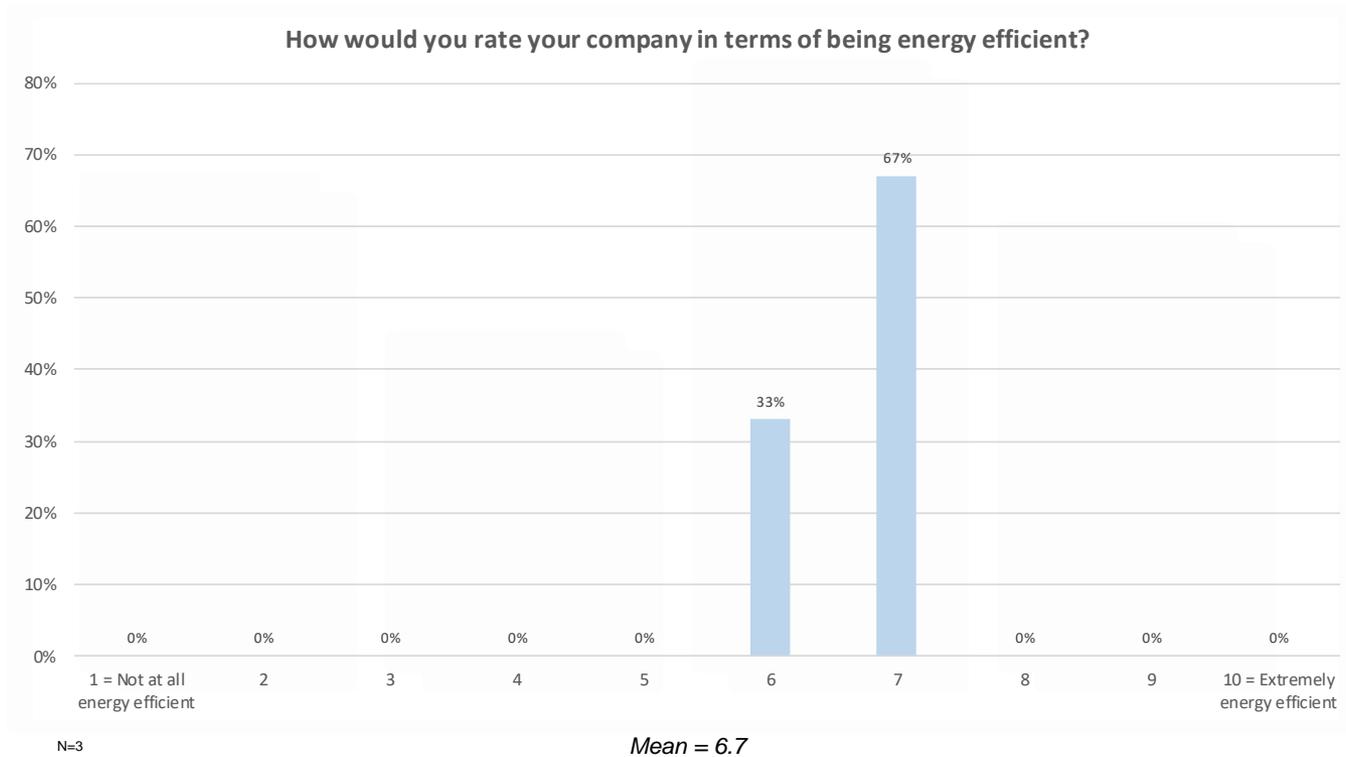
Opt Out Decision



Energy Efficiency Program Offering



Company's Energy Efficiency



MEEIA III
Residential HVAC Contractor
Customer Research

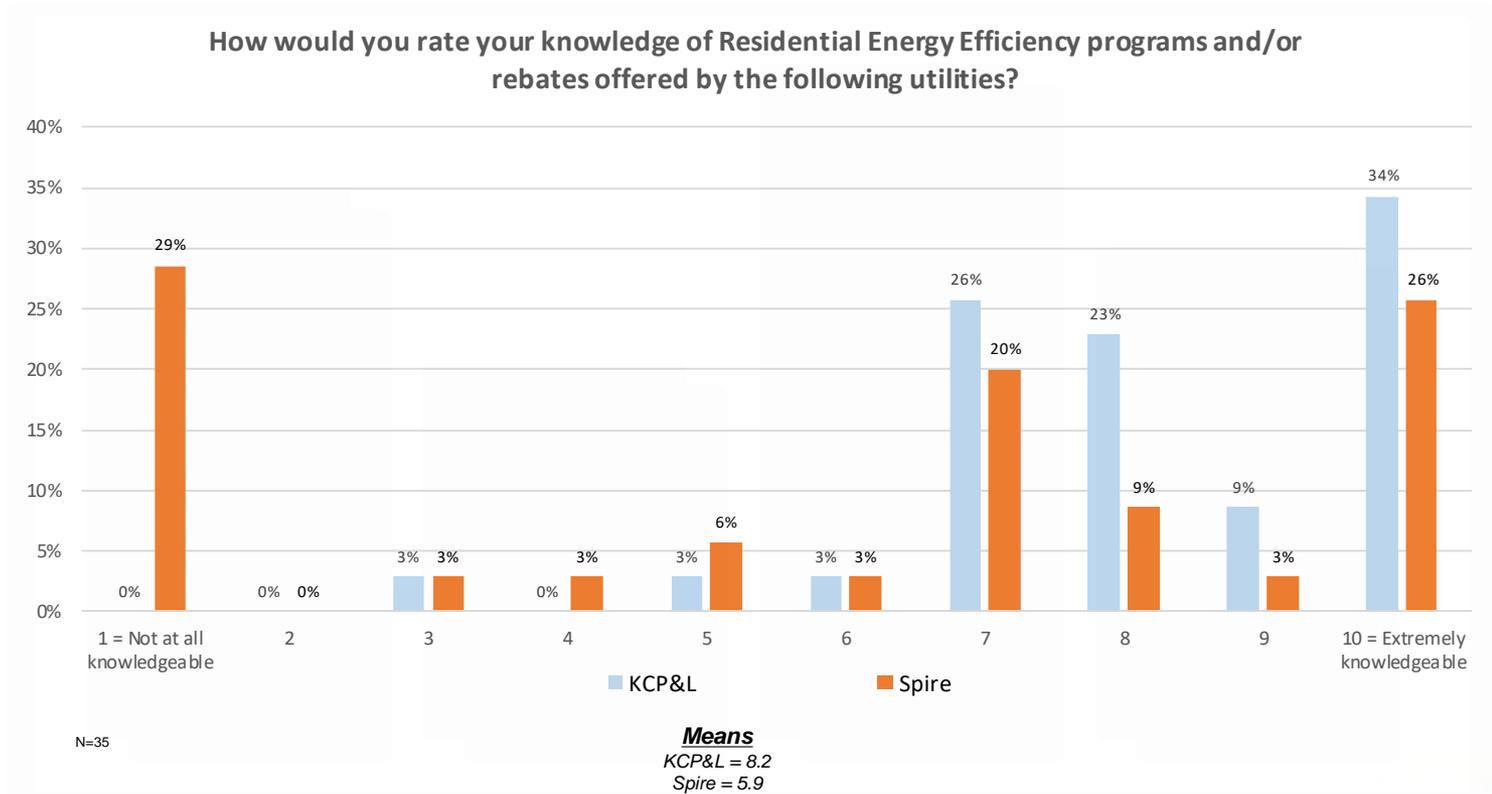
December 2017



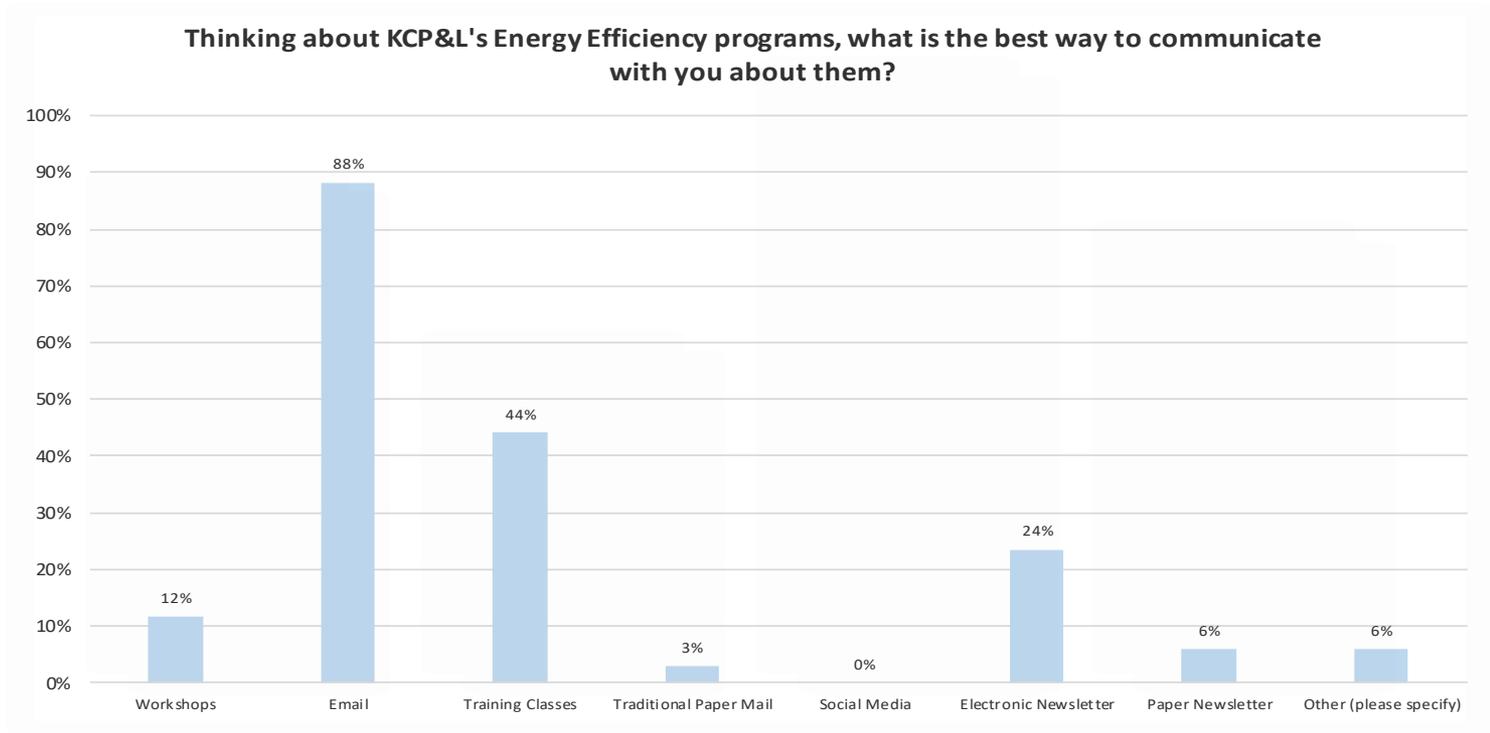
Summary of Findings

- We asked about a Maintenance/tune-up partnership between KCP&L and HVAC Contractors and there was strong interest in the concept. This could be an opportunity to get leads if KCP&L paid a portion of the cost for those customers on a maintenance/tune-up agreement. The idea would be to get specific customer info on the efficiency of their systems and market to those that are close to replacement.
- The main reasons for customers NOT participating in KCP&L's Heating and Cooling Rebate include upfront cost of higher efficiency equipment and rebate amounts being too low. I'm not sure how much flexibility we have on the rebates but it should be re-evaluated on a regular basis.
- There are some HVAC Contractors and customers who have perceptions of Heat Pumps being more expensive, require more maintenance, and do not provide the same comfort levels of traditional gas furnaces. That along with overall lack of customer knowledge about Heat Pumps often make them a difficult sale. Providing a Heat Pump Spiff may increase some HVAC recommendations but will not get all contractors to recommend them.
- Some respondents feel that their company does not promote KCP&L's Energy Efficiency programs every time there is an opportunity. However, most individuals feel like they personally do a good job of promoting the EE programs.
- Two-thirds of HVAC Contractors surveyed said they would like to receive training in Energy Efficiency Sales.
- Email and Training Classes are the most preferred communication methods
- Also, there is high interest in Co-op Marketing with KCP&L (*see list within report*)

Knowledge of KCP&L's Residential Energy Efficiency Programs



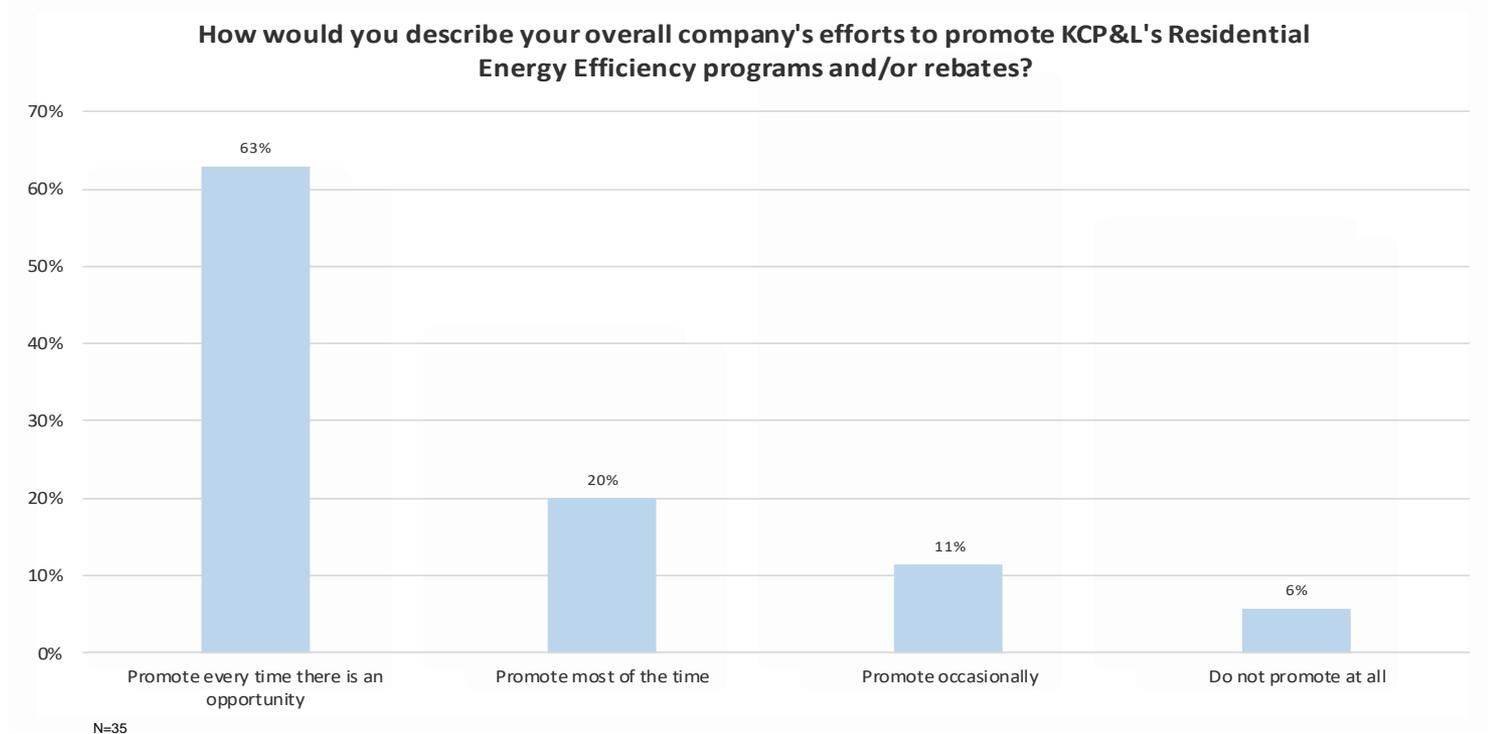
Program Communications



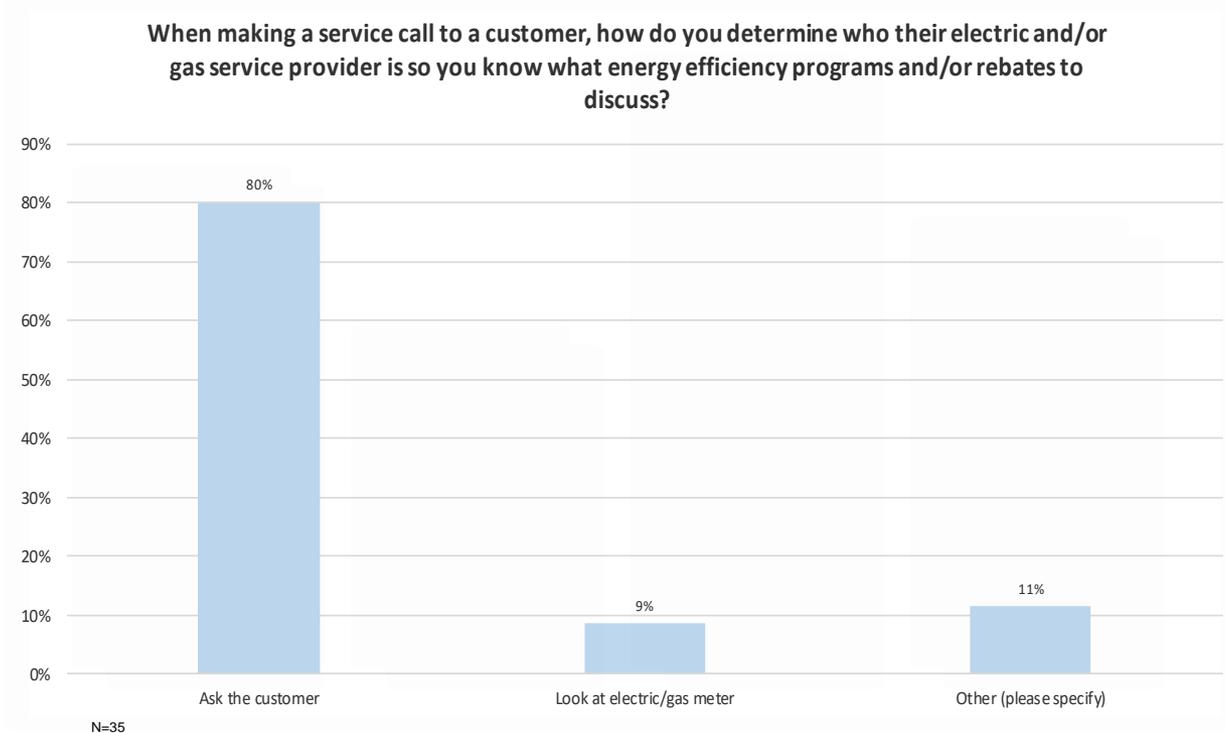
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Company's Efforts to Promote KCP&L Programs

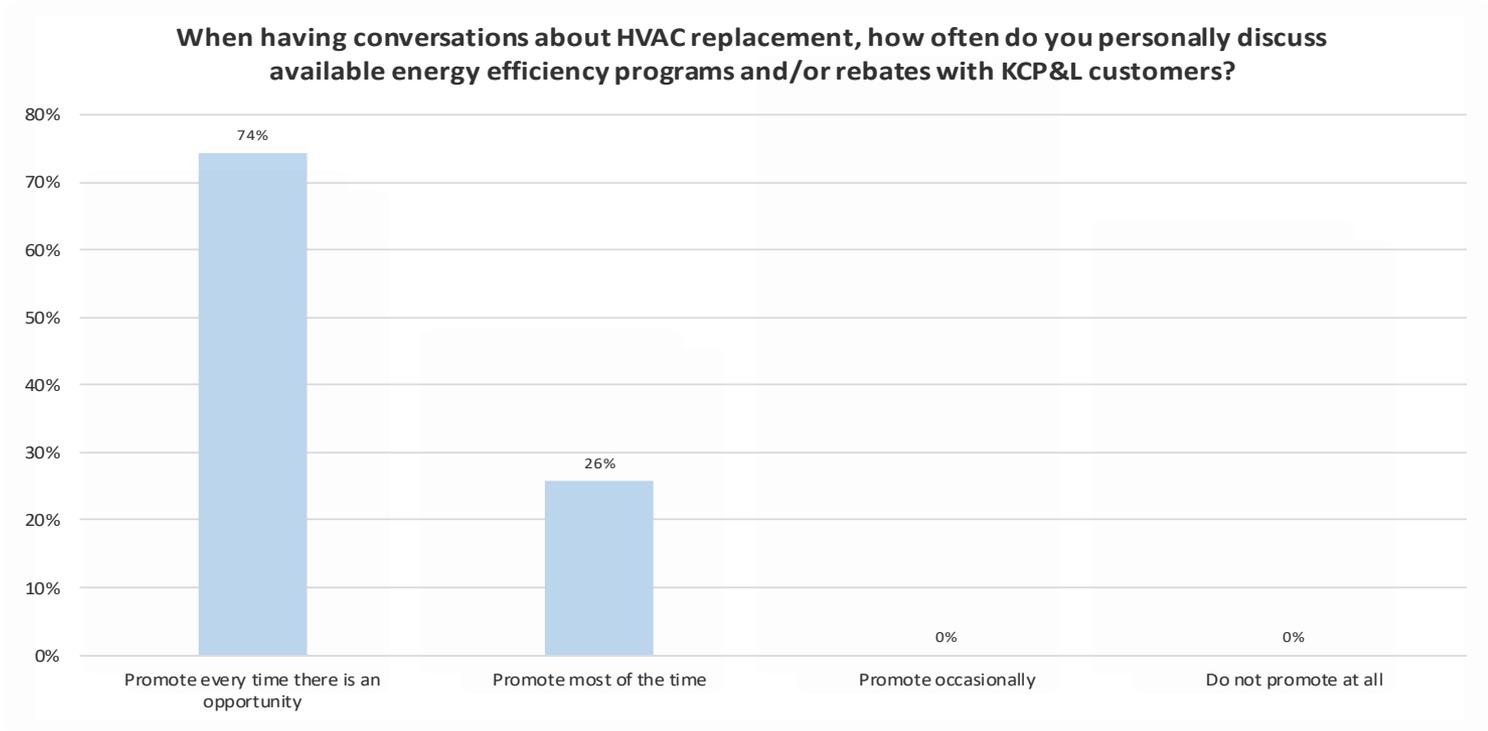


Service Provider



- Other (please specify):
- We typically know from where they live
 - KC MO customers we assume are KCP&L, we don't worry about the others

Personally Discuss KCP&L Programs with Customers



N=35



Reasons Customers Do Not Participate

Based on your interactions with customers, what are the main reasons that a KCP&L residential customers do NOT participate in the rebates available to them?

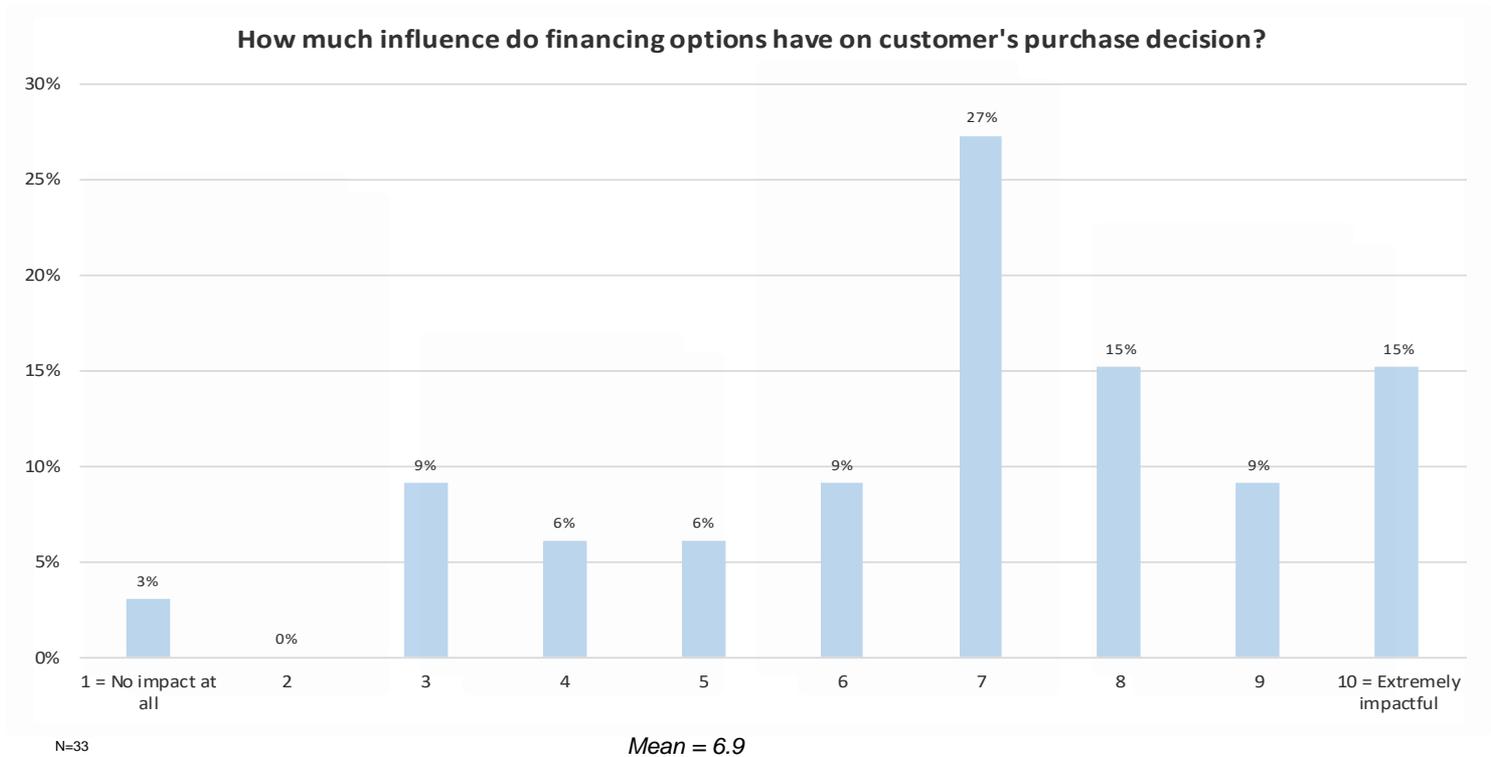
- *Cost of higher efficiency equipment*
- *They do not want to pay for the audit*
- *They do not always qualify*
- *Money*
- *If we have gotten the bid, every customer has participated*
- *1-They have a gas furnace and do not want to pair a heat pump with it. 2-The customer is looking at a low end option that doesn't apply for the rebate*
- *customer doesn't know about the programs*
- *Rebates are too low*
- *Costs*
- *Do not have the money for high efficiency systems*
- *Lack of knowledge. Need better promotional literature*
- *Eligibility problems*
- *Most of our customers that have funds available purchase equipment that has some sort of rebate associated with it. I don't necessarily think that this is a good thing. Rebate programs should incentivize purchasing significantly more efficient equipment than standard. The current program only incentivizes getting barely more than standard equipment and disincentives purchasing significantly more efficient equipment.*
- *They live in Kansas*
- *Equipment that qualifies for rebates out of their price range*
- *lack of knowledge and lack of desire from salesman/technician to educate*
- *Most of them aren't aware of the rebates other than the AC replacement program. There is no advertising for the insulation and air sealing program*

Reasons Customers Do Not Participate

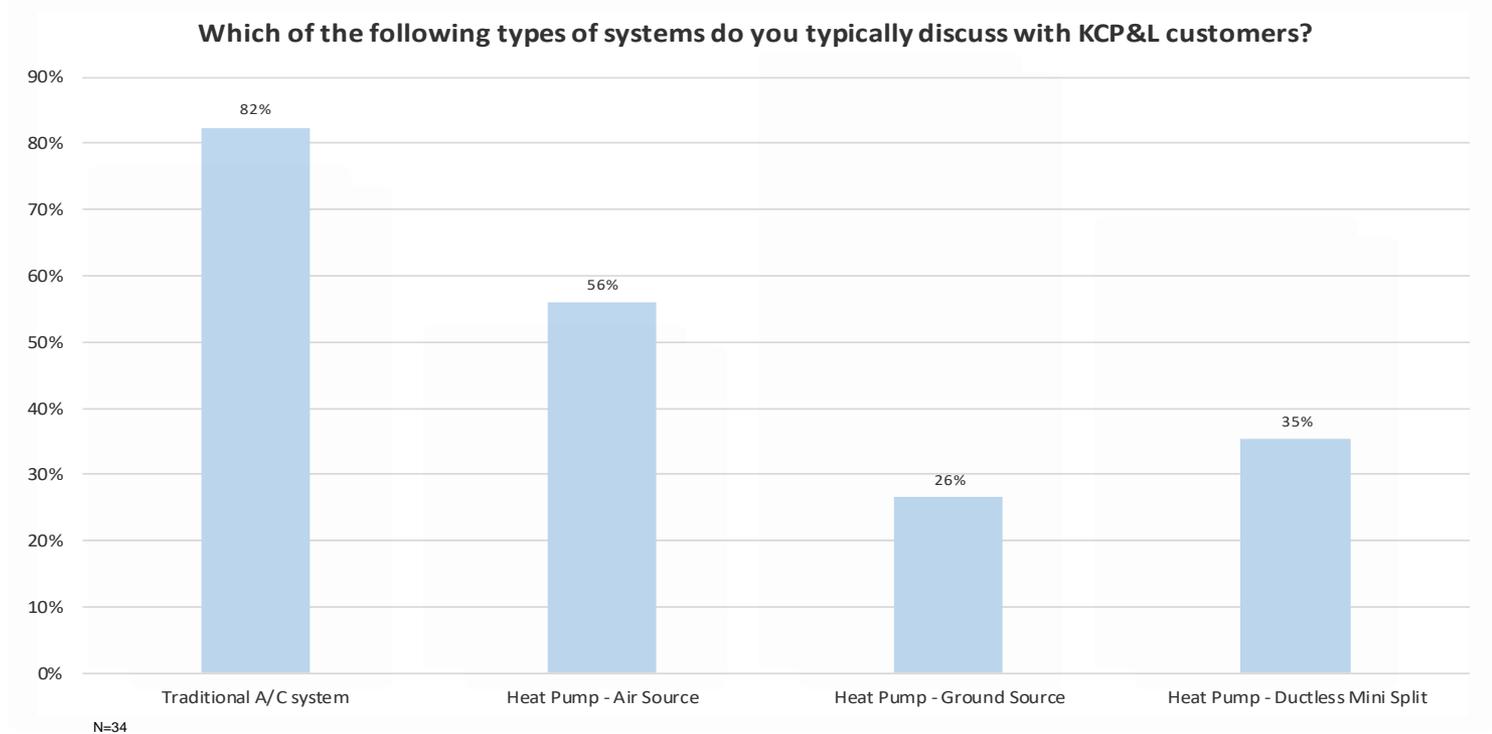
Based on your interactions with customers, what are the main reasons that a KCP&L residential customers do NOT participate in the rebates available to them? - *continued*

- *If ever extra cost . Usually if person is selling in near future just want either furnace or a/c not both.*
- *They may not be entirely ready to buy*
- *Can only afford the minimum available option to them due to budget constraints*
- *The cost for the higher seer is usually more than they want to spend. Sometimes the rebate will offset the cost but not always*
- *They may be looking for a lower cost system that wouldn't qualify for the available rebates, and the rebate may not bring the total cost low enough to compete with the lower cost option*
- *cost of qualifying equipment*
- *Usually if they want a cheaper product and do not want to spend the \$ on a higher seer rating*
- *they always do if eligible*

Influence of Financing Options



System Types

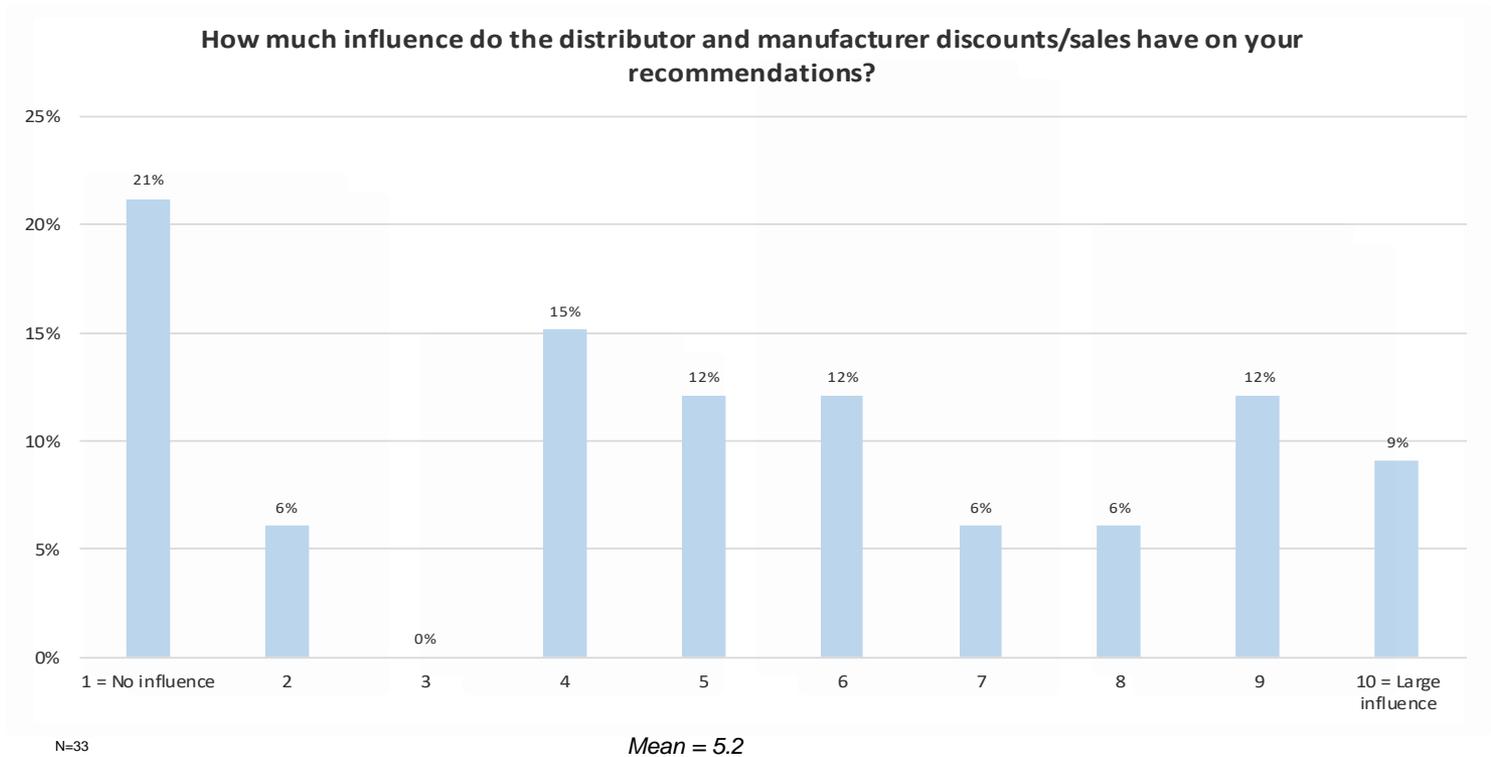


Heat Pump Barriers

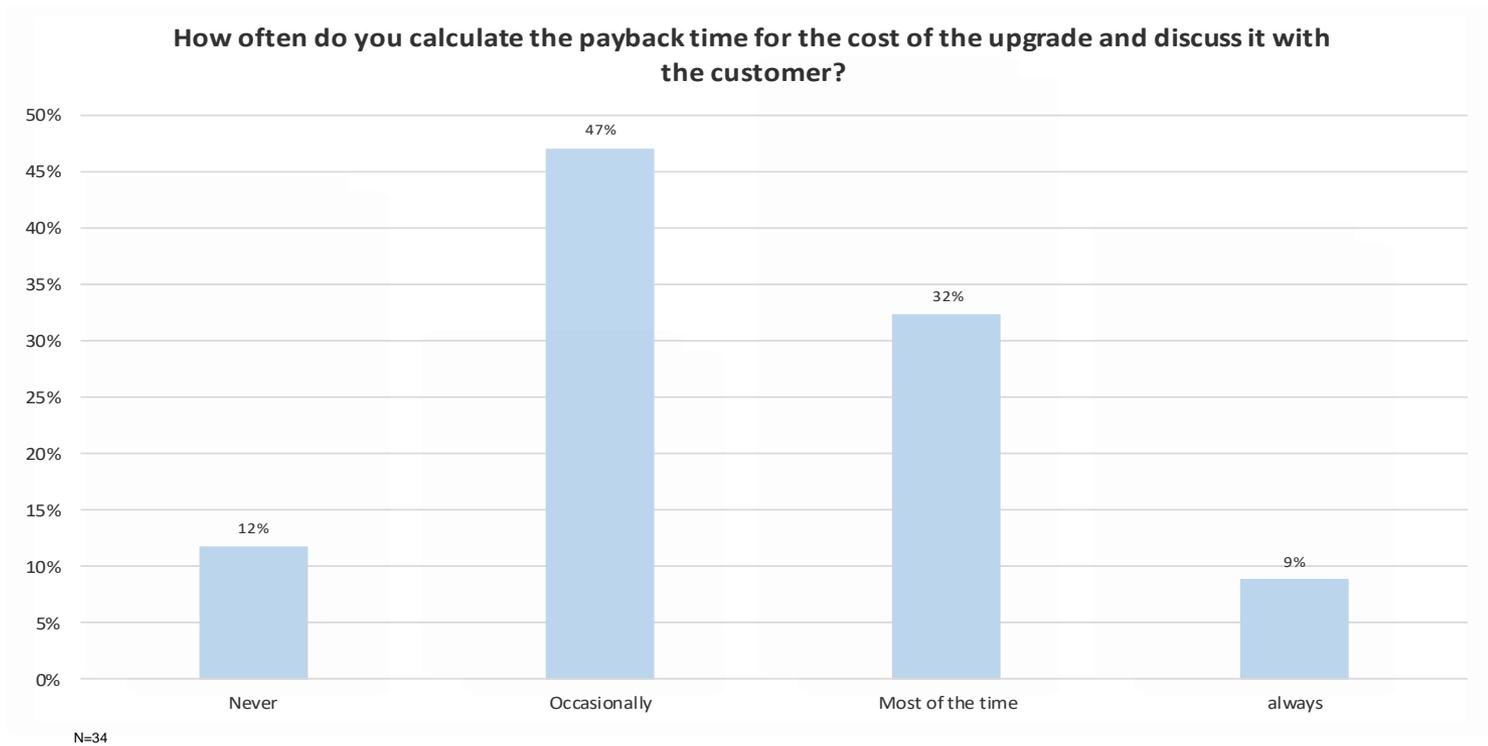
What is the reason(s) that you do not typically discuss Heat Pump options with KCP&L customers?

- *Most customers that we service already have central air conditioning so they want to keep what they have generally*
- *It's not worth it*
- *Them having to upgrade panel box*
- *Don't like them*
- *Our experience, along with customers experiences, is that heat pumps are more costly, don't last as long, are less cost effective to operate, more difficult to repair, and less comfortable than traditional AC/Furnace systems*
- *Most Heat pump customers have not been satisfied with how comfortable their house is while running the heat pump*
- *HP rebates do not offset cost of equipment. Customers like the gas furnace higher temperature delivered. HP often have more maintenance requirements and breaks in service. Gas is currently very cheap*
- *I bring them up when finding out how they would best like to proceed, but many people have been turned off heat pumps due to past experiences with poorly installed heat pump systems. I work very hard to educate them on how a properly set-up, controlled system can be very beneficial.*
- *comfort, gas is not that expensive anymore. we discussed this in the last work shop*

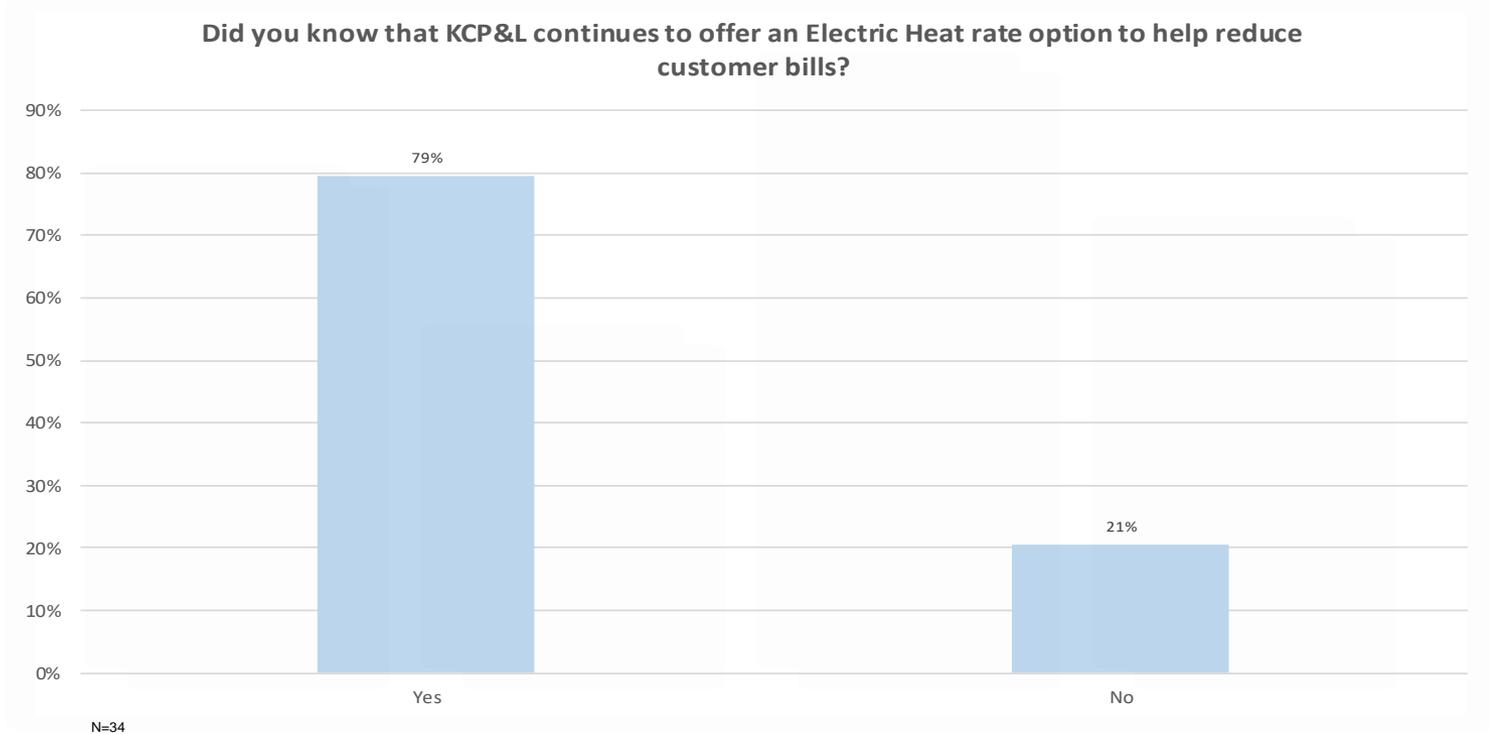
Influence of Manufacturer Discounts and Sales



Payback Calculations



KCP&L All Electric Rate Offering

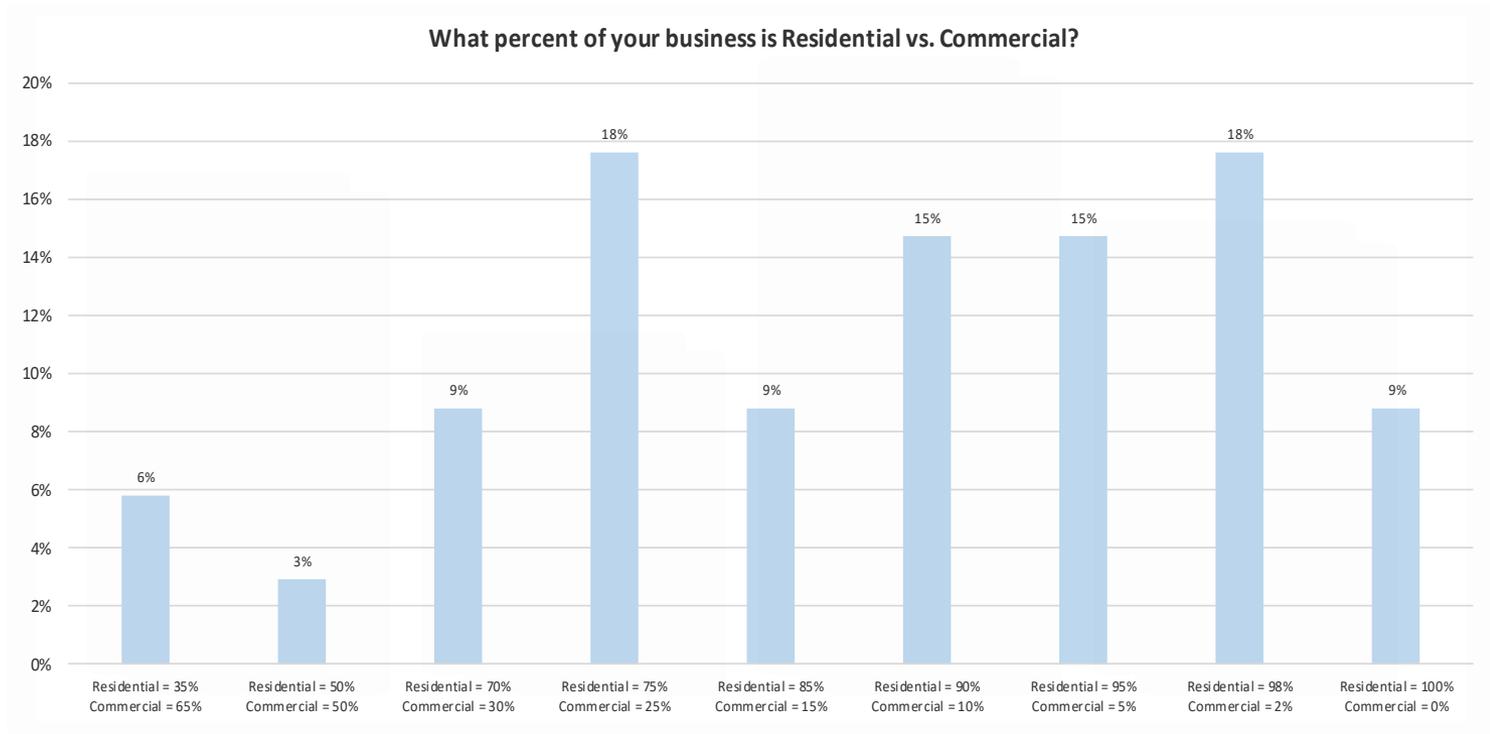


Impact of Heat Pump Spiff

Does having the Heat pump Spiff...	
<i>encourage you (or your company) to promote heat pumps to customers that already have them.</i>	41.2%
<i>encourage you (or your company) to promote heat pumps to customers that DO NOT already have them.</i>	26.5%
<i>has no impact on what I offer to the customer or try to sell, I sell heat pumps all the time.</i>	17.6%
<i>has no impact on what I offer to the customer or try to sell, I sell what the customer ask for.</i>	44.1%
<i>has no impact on what I offer to the customer or try to sell, I do not like or recommend heat pumps</i>	14.7%

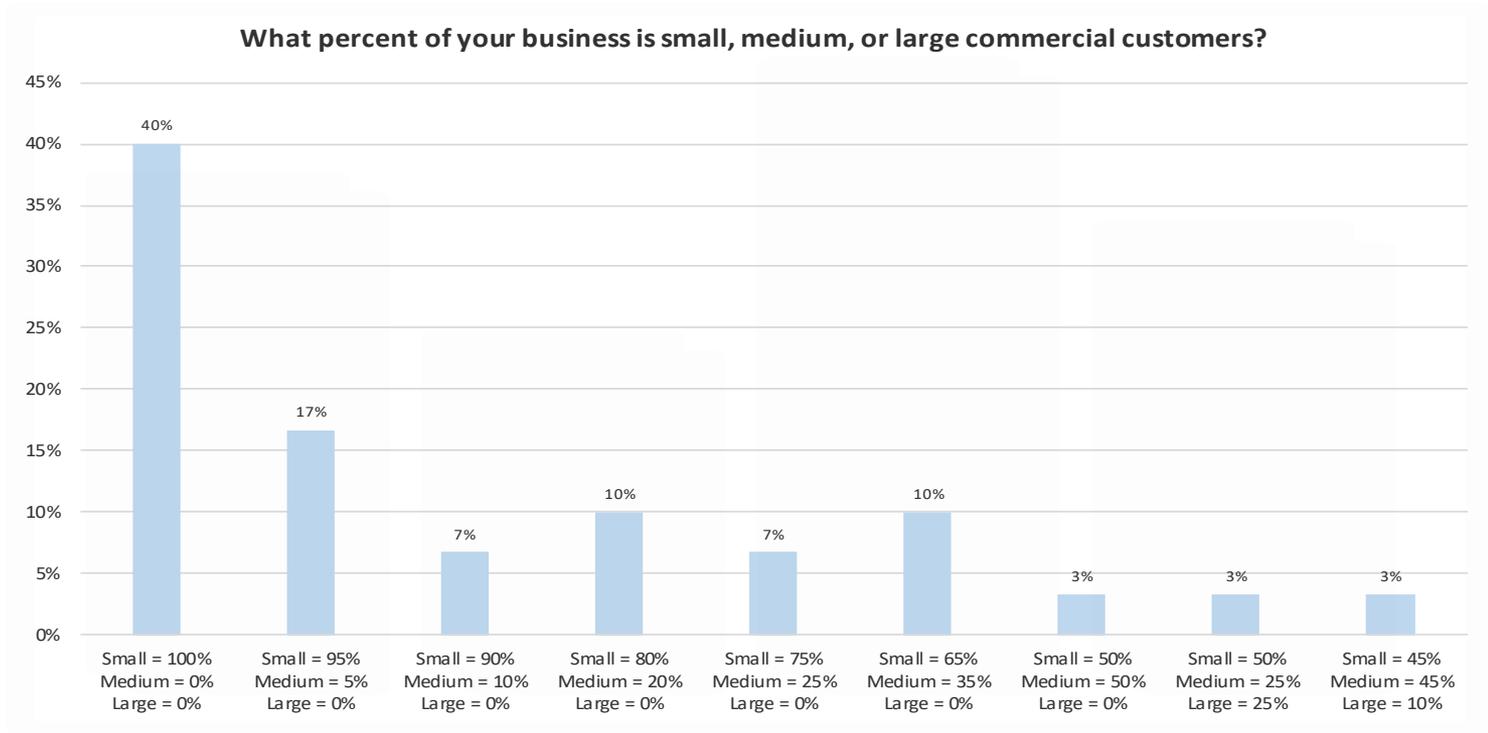
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Residential vs. Commercial



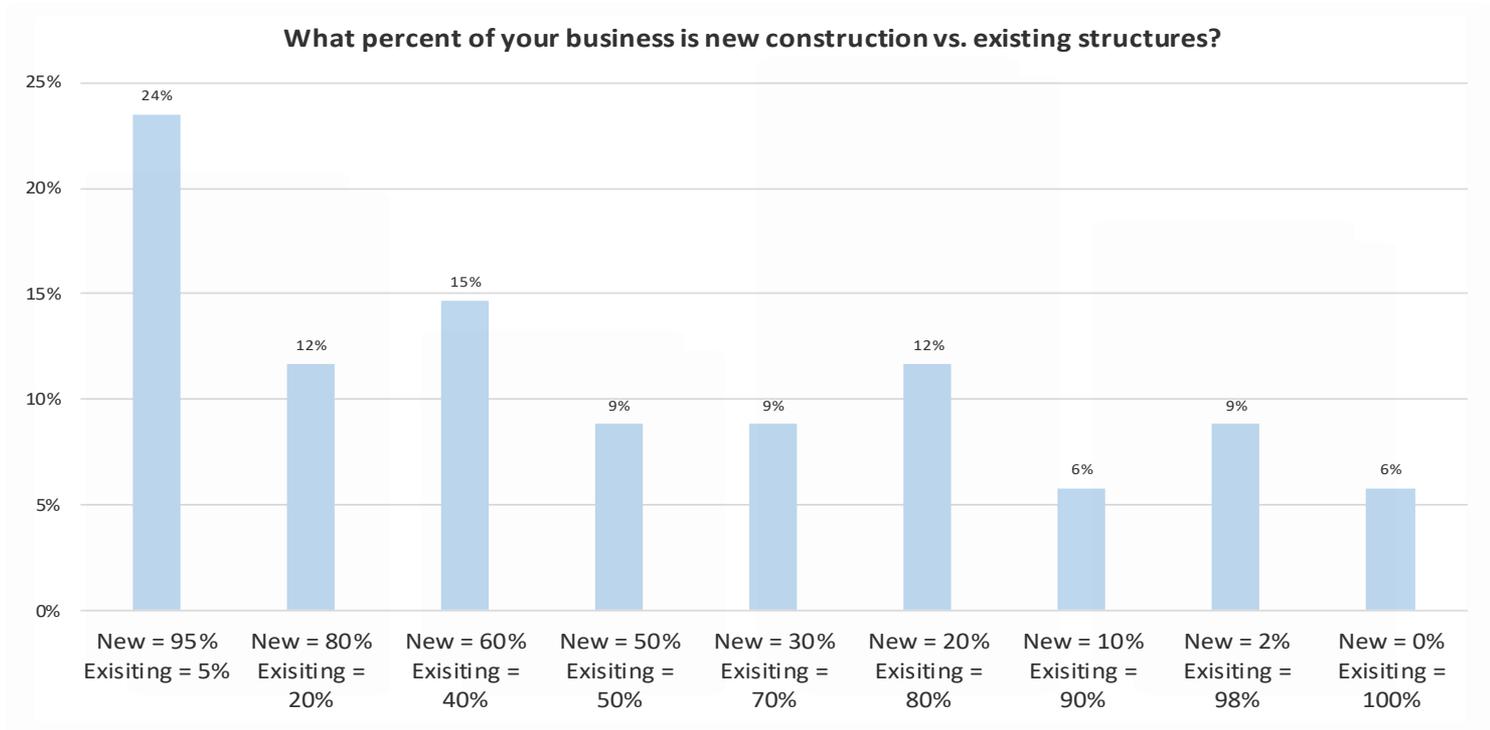
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Customer Type - Size



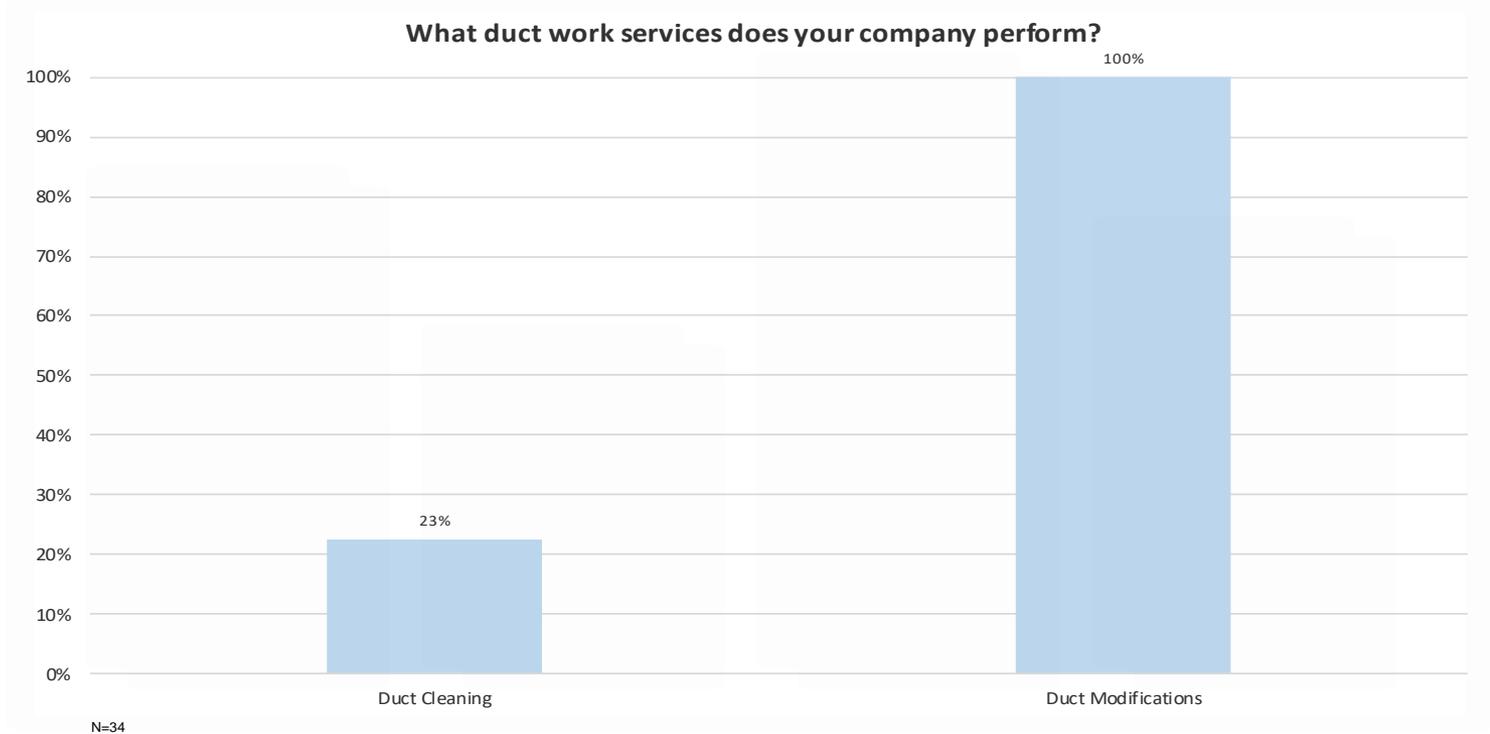
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Customer Type – New vs. Existing

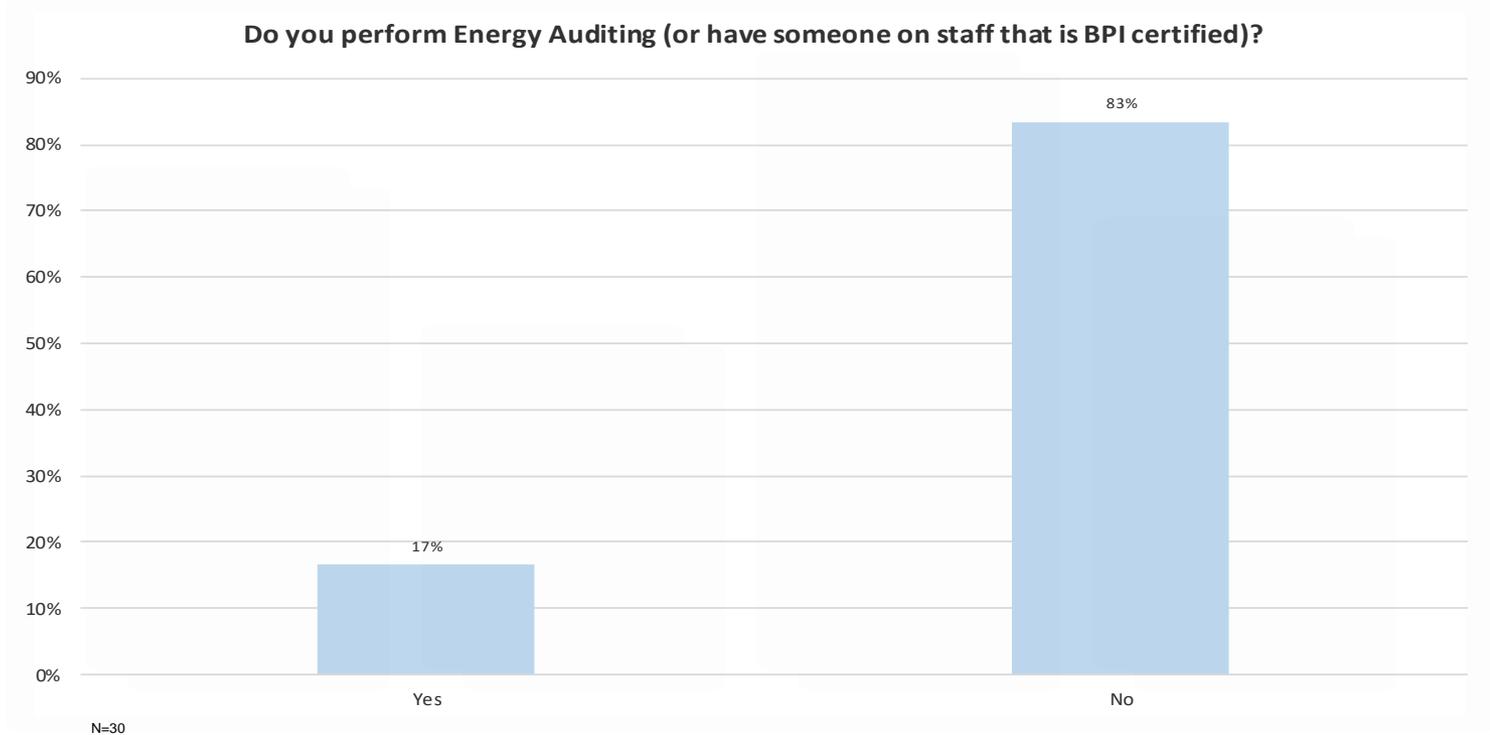


N=34

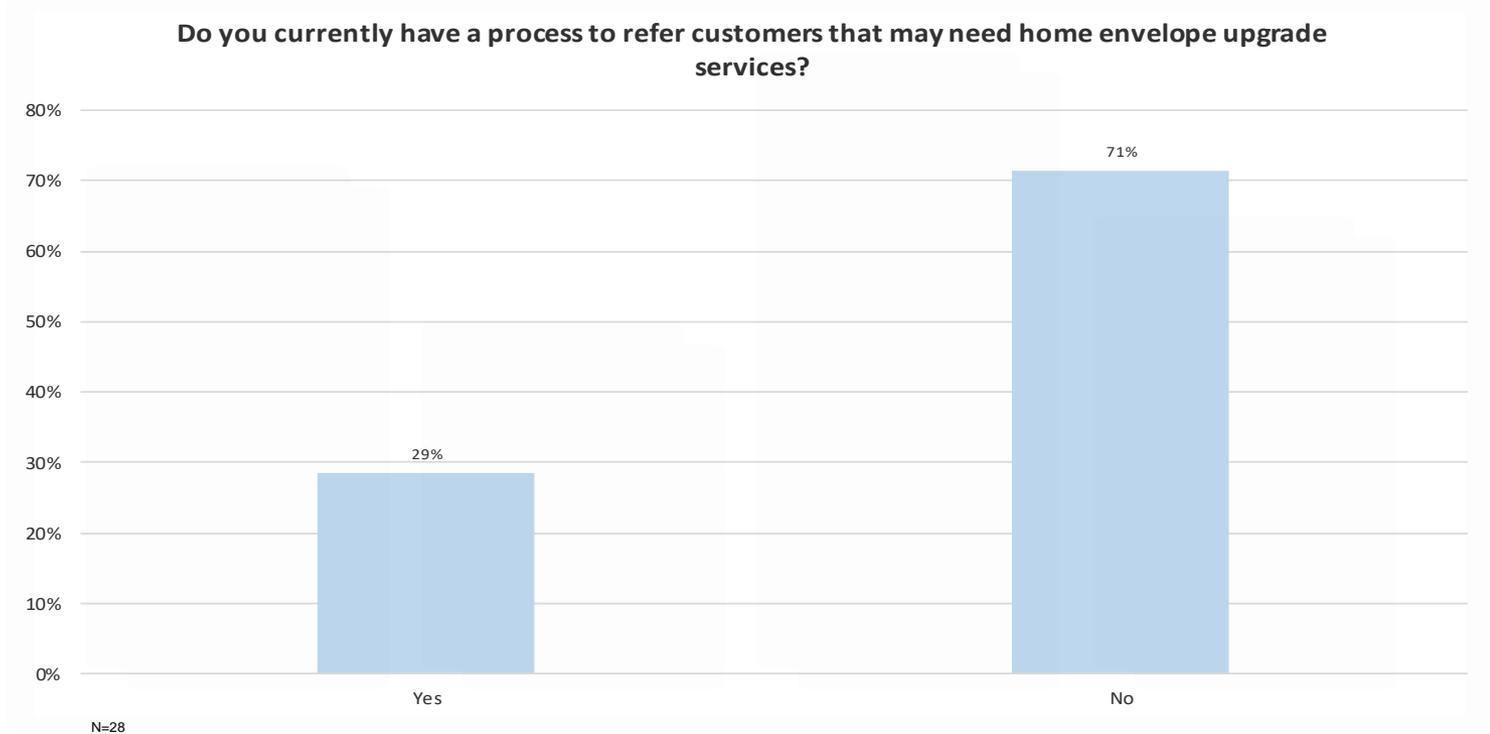
Duct Work Offered



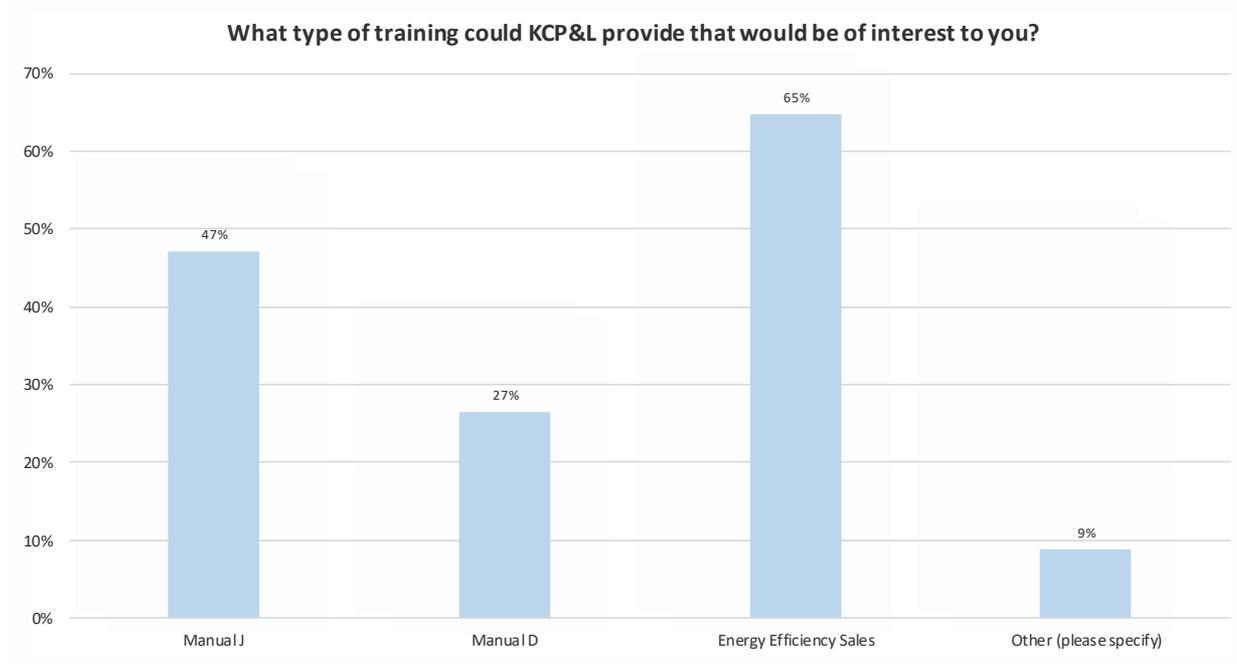
Energy Audit Offered



Referral of Envelope Upgrade Services



Training Needs

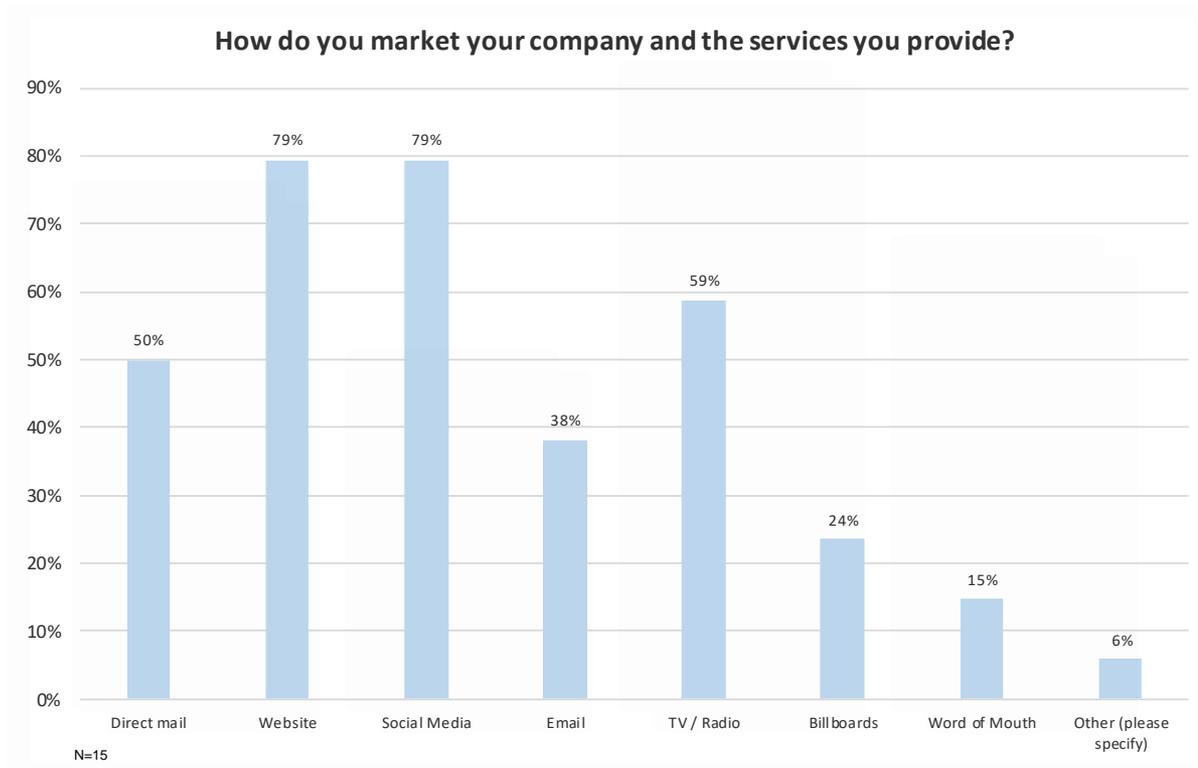


- Other (please specify):
- *Builder education on geothermal heat pumps*
 - *None*

N=34

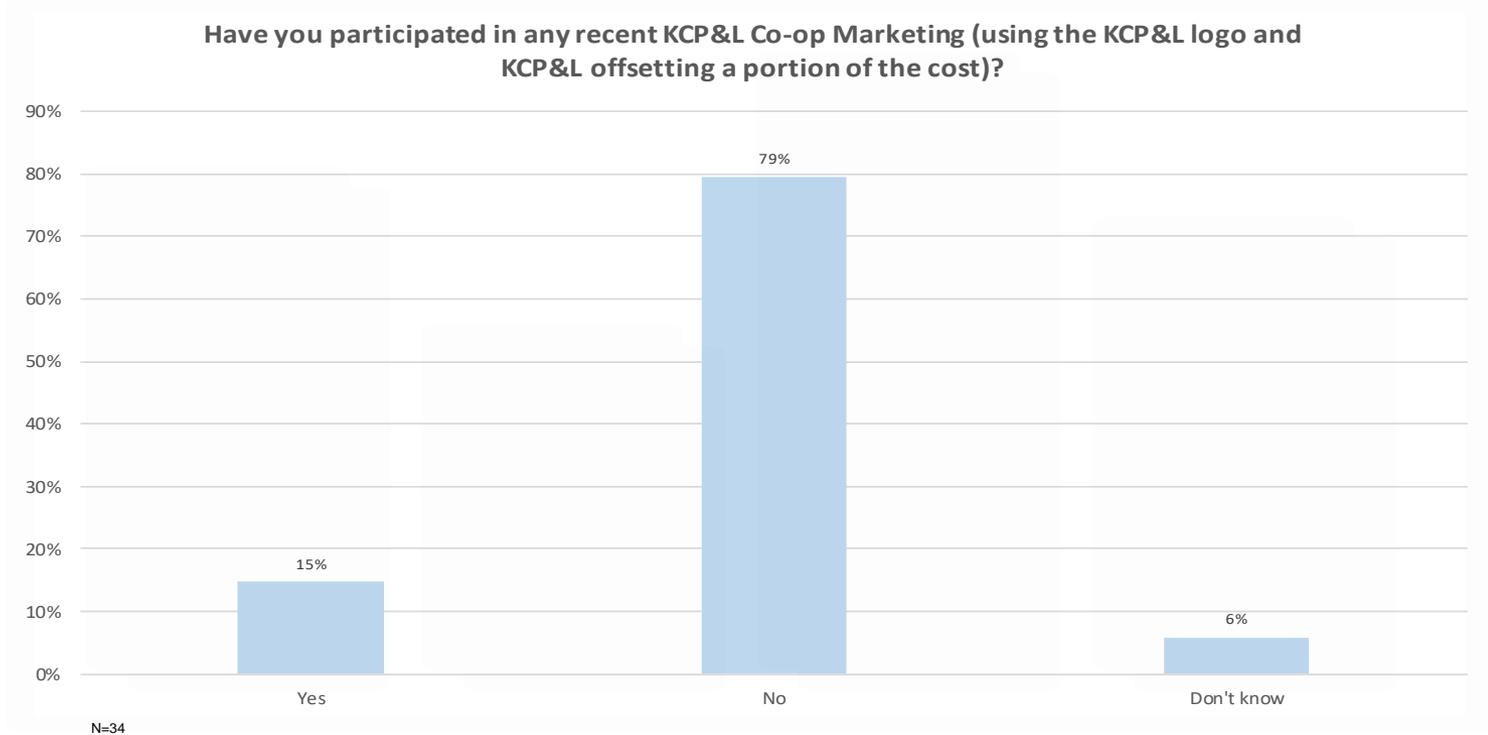


Marketing

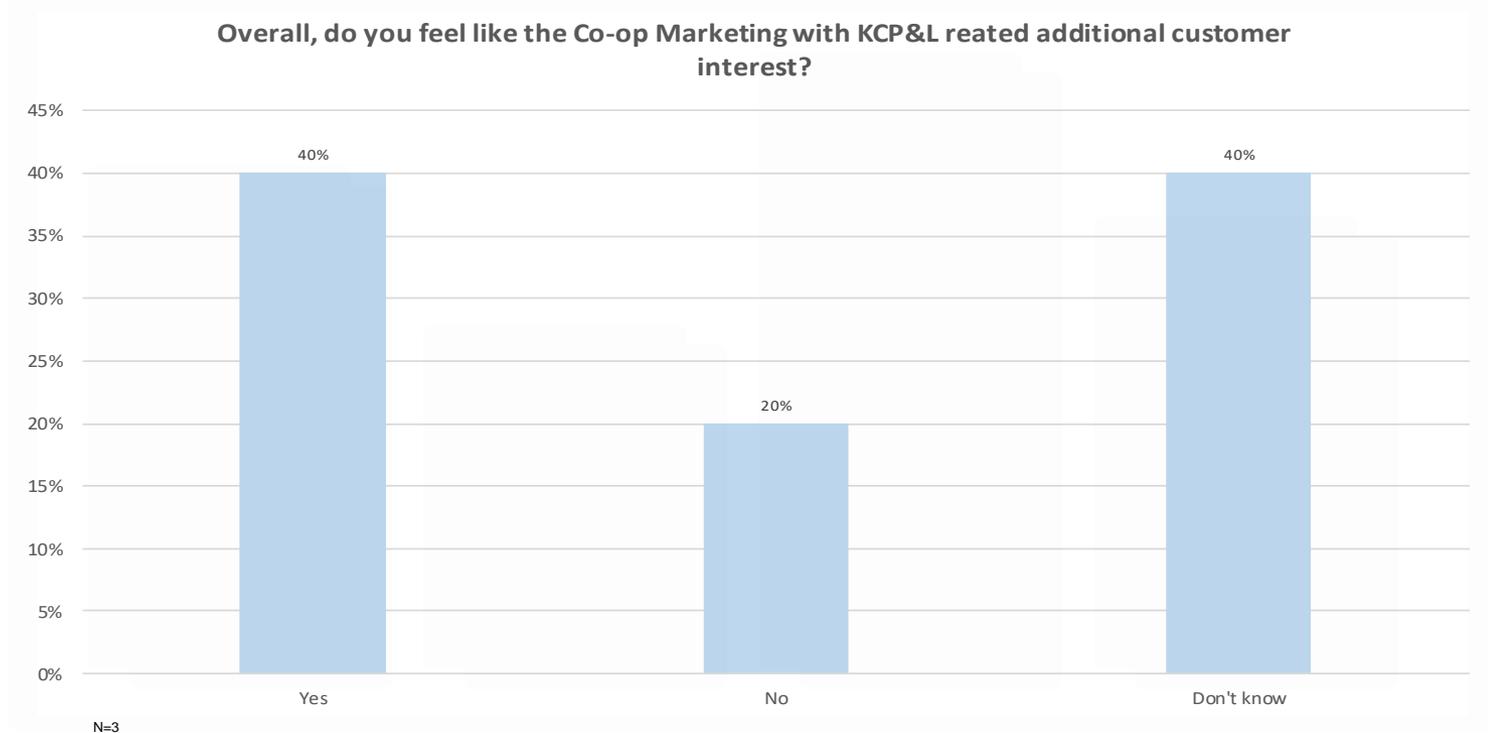


- Other (please specify):
- Home Shows
 - Ad Words

Co-op Marketing Past Participation



Impact of Co-op Marketing



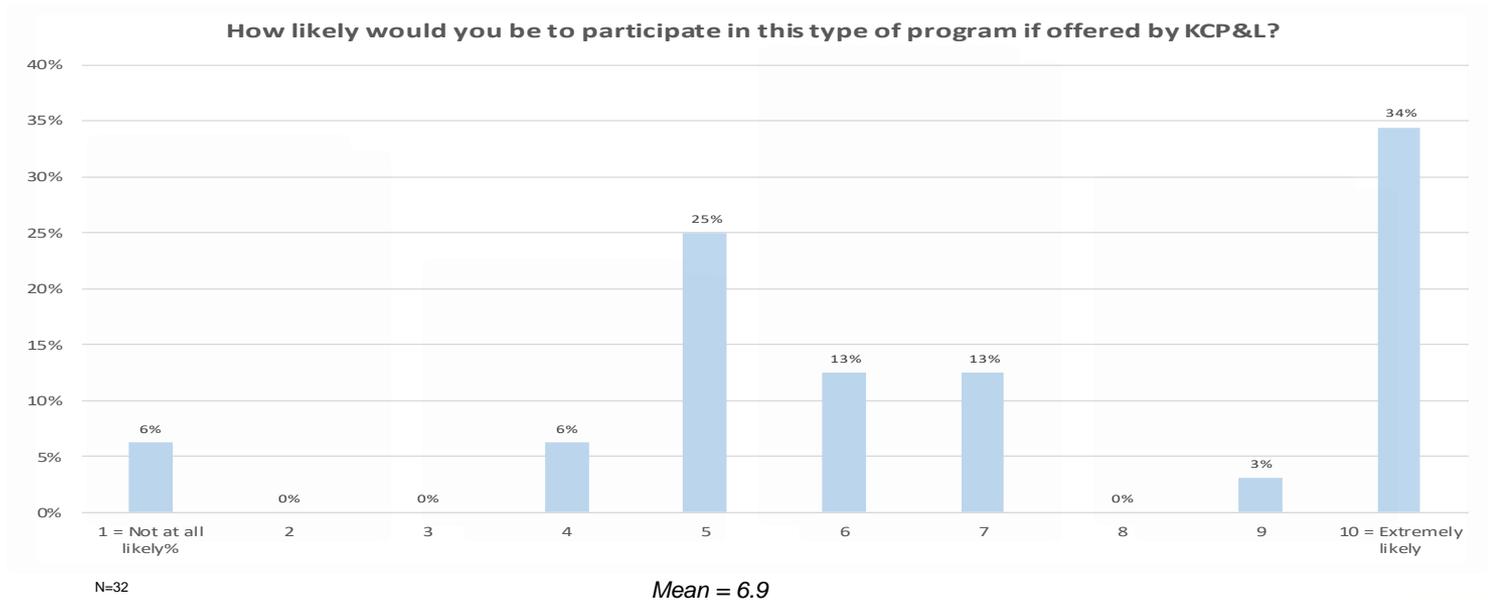
Interested in Co-op Marketing with KCP&L

If interested, please provide your contact info someone from KCP&L can reach out to you about co-brand marketing

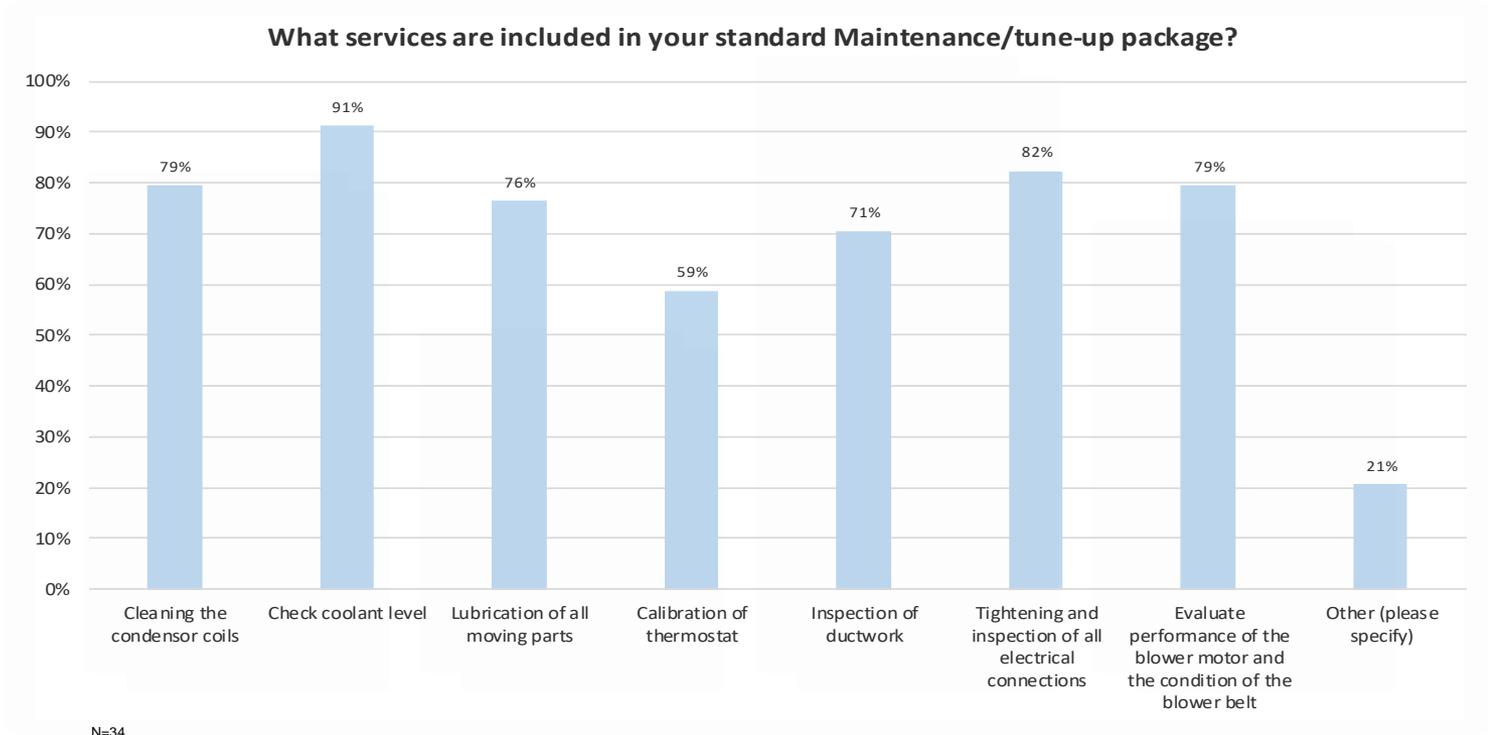
Business Name	Contact Person	Phone	Email
Lee's Summit Heating and Cooling	Steve Studer		steve@lshheatcool.com
Buckner's Heating & Cooling co	Jill Buckner	816-436-1244	jill@bucknershc.com
Barnes Heating & Cooling	Paul Workman	816-324-3824	barnes_heating@hotmail.com
kB complete	JB	9134757468	jbohrn@kbcomplete.com
CDL Electric Co Inc	Lynn Merrideth	620-231-6420	
Green Factor Insulation	William Loy	7852699303	william@gfipro.com
Premier Climate Control	Amy	660-460-5999	premierclimatecontrol@yahoo.com
ECS Geothermal	Chris	806-820-0659	chris@geoecs.com
AFC Heating and Cooling	Phil Spellerberg	816-347-8388	afckc1@gmail.com
ECS Geothermal Inc.	Darrin Sherry	816-215-4615	darrin@geoecs.com
Summit Heating and Cooling	Brendan Williams	816-832-7770	info@summithckc.com
Summit Heating and Cooling	Brendan Williams	816-832-7770	info@summithckc.com
Rlf mechanical	Rich funk	816 250 2993	Rlfmech61@gmail.com
Elkins Air Cond. & Htg., Inc.	William Elkins	816-807-7625	elkinsinc81@aol.com
CLimate Control	David Dennis	7811997	ddennis@climatcontrolkc.com
Star Energy Consultants	Ben Meyer	816-607-8000	bmeyer@mystarenergy.com
Home Service Specialists	Chad Engles	8165187893	Repairserviceinfo@gmail.com
Bob Hamilton	Rebecca Music	9138884262	rebecca@bobhamilton.com
MVP Electric Heating and Cooling	Chip Gabbert	9133220868	Chip@mvpelectric.com
MD REPAIR	MICKIE OR ANGELA	816-690-7985	THREEMGROSS@YAHOO.COM
TC Heating & Cooling	Tim Conway	816-779-1150	tchctim@fairpoint.net
Envirotech Heating and Cooling	James Gallet	913-268-6700	jamesg@envirotechks.com
H K Quality Sheet Metal	Fred Hangartner	816 233 6335	hkqsm@sbcglobal.net
Ernsbarger Heating and Cooling INc	Brent	4176679454	ernshvac@att.net

Maintenance/tune-up Partnership Program Interest – New idea

Some utilities are beginning to partner with local HVAC Contractors on annual maintenance/tune-up programs. The utility pays an annual fee to the HVAC Contractor for the following: Providing Customer Name, Address, and Email address of those on maintenance agreement Providing information such as health, age, and type(s) of HVAC system(s) Promoting the utility's energy efficiency programs during customer visits The partnership allows the HVAC Contractor to possibly reduce the cost of their maintenance/tune-up program and increase their profit margins. The program also allows the utility to market additional energy efficiency rebates that could lead to sales directed to the HVAC Contractor.



Standard maintenance/tune-up Services Provided



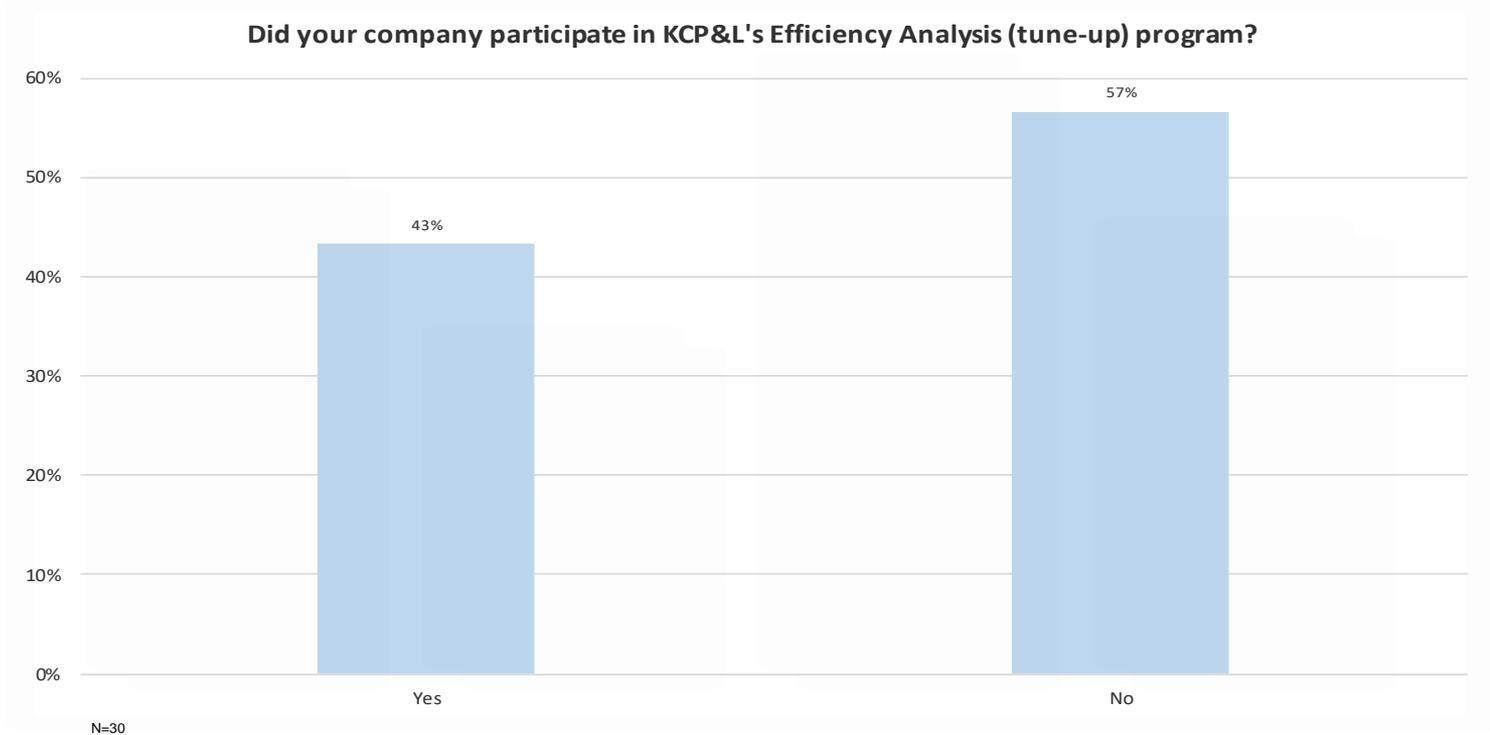
Standard maintenance/tune-up Services Provided - Other

What services are included in your standard Maintenance/tune-up package?

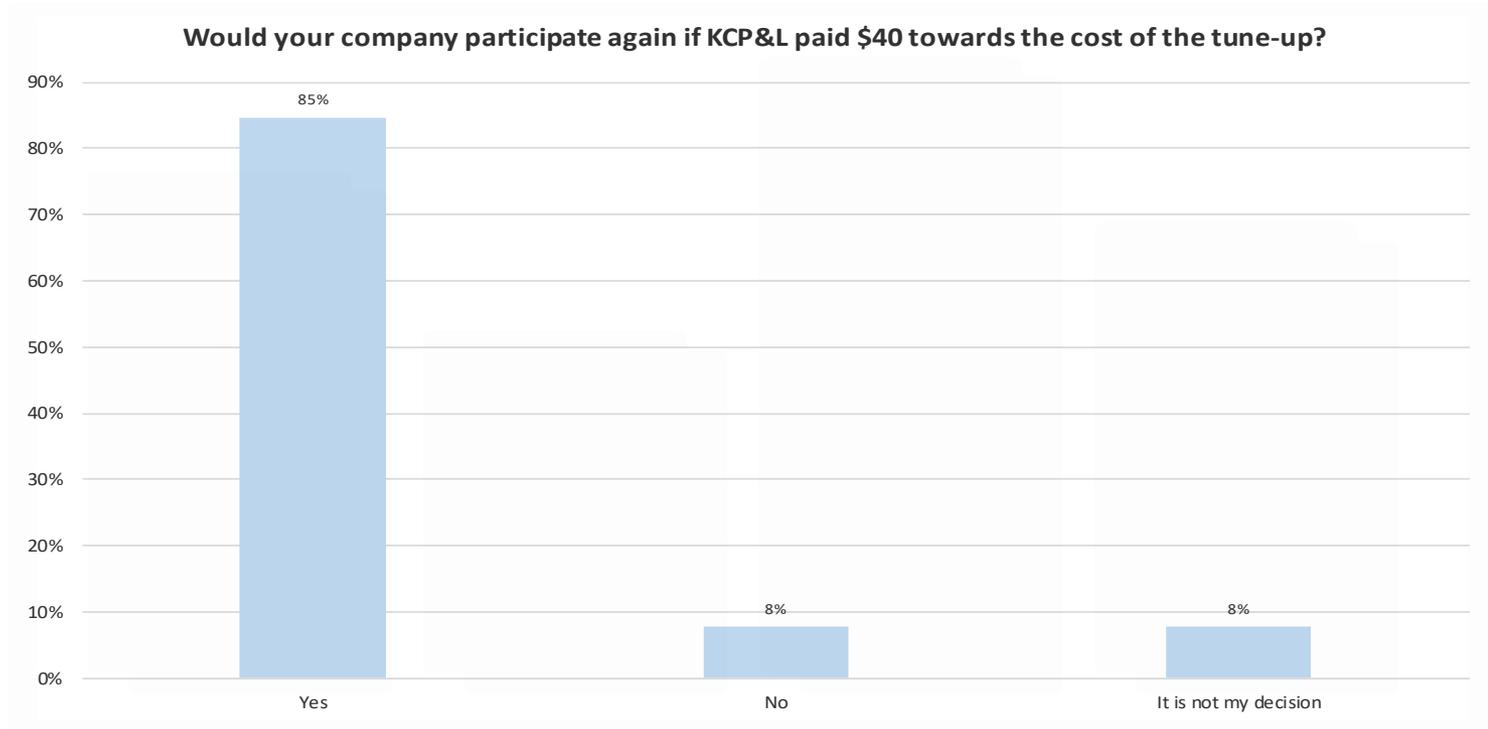
Other (please specify)

- *I do energy audits not HVAC*
- *Insulation*
- *Filter*
- *Air Conditioners and Heat Pumps Visual Inspection 1. Age of equipment. Has it been properly maintained. 2. Electrical wiring and switch condition 230,115 and 24 volt 3. Check thermostat operation & AC function for any problems 4. Noise level of blower and outdoor condenser/heat pump 5. Blower wheel balanced 6. Outdoor fan blade inspection. 7. Check and replace air filter, humidifier panel, and UV lamp(s). (Close humidifier damper.) Electrical Checks 8. Line voltage (+/-10%), tighten all connections 9. Secondary voltage, tighten all connections 10. Circuit board inspection, tighten all connections 11. Condenser total amperage to nameplate 12. Blower amperage to nameplate (inspect, clean, & oil if necessary) 13. Blower motor capacitor check 14. Compressor run capacitor check 15. Condenser fan motor capacitor check 16. Contactor inspection and voltage drop Performance Checks 17. Clean outdoor coil, clean exterior cabinet & apply company sticker 18. Inspect evaporator coil if possible 19. Check blower motor bearings (oil if required) 20. Open all supply registers and check for return grille blockage 21. Check refrigerant pressures (superheat or sub cooling method) 22. Check temperature drop and adjust if necessary 23. Check Total External Static Pressure 24. Check all high & low pressure controls 25. Clean condensate and (humidifier) drain lines 26. Wipe down furnace and water heater with cleaning solution 27. Record maintenance information on maintenance log 28. Final AC operation check, check batteries and set thermostat to owner's preference. Advise homeowner to close basement registers if applicable.*
- *Gas Fired 80% and 90% Furnaces Visual Inspection 1. Age of equipment. Has it been properly maintained. 2. Clearances to combustibles. 3. Proper Combustion Air (water heater) smoke puffer test. 4. Vent piping condition and proper slope (water heater) 5. 90% exterior vent termination clearance & condition 6. Gas piping condition to code and leak free (shut offs) 7. Electrical wiring and switch condition 115 and 24 volt 8. Check thermostat operation & furnace sequence for any problems (advise customer) 9. Check and replace air filter, humidifier, and UV lamp(s). Electrical Checks 10. Line voltage (+/-10%), tighten all connections 11. Secondary voltage, tighten all connections 12. Circuit board inspection, tighten all connections 13. Total furnace amperage to nameplate. 14. Blower amperage to nameplate (inspect, clean, & oil if necessary) 15. Blower motor capacitor check 16. Inducer motor amps to nameplate (inspect & clean if necessary) 17. Inducer pressure control check (cold & hot) 18. Flame sensor micro-amps (SI 1 to 5 min .45) (HS .5 to 2 min .9) clean sensor brush or SW Performance Checks 19. Inspect burners, flame & heat exchanger, clean if necessary 20. Adjust manifold pressure (only if necessary) 3.5" NG 10.5 LP 21. Open all supply registers and check for return grille blockage 22. Check temperature rise and adjust to nameplate if necessary 23. Check CO PPM content of flue gases (OD termination for 90%) 24. Check all high temperature and roll our safety controls 25. Clean humidifier drain line & 90% trap and drain line 26. Wipe down furnace and water heater with cleaning solution 27. Final furnace sequence of operation check: check batteries and set thermostat to owner's preference.*
- *Check amp draws and voltage on all Motors clean contacts were available*
- *Don't perform any HVAC work*
- *Capacitor and contractor check*

Past Participation in KCP&L's Efficiency Analysis



Future Participation in KCP&L's Efficiency Analysis



N=13

Program Suggestions

Is there anything missing from KCP&L's programs related to energy efficiency? This could include rebates currently offered or something that is not currently being offered.

- *Is there anything missing from KCP&L's programs related to energy efficiency? This could include rebates currently offered or something that is not currently being offered.*
- *YES, rebate for the energy audit*
- *I can't get ahold of anyone to become an authorized contractor for Home Insulation.*
- *Rebates for higher efficiency a/cs. Keep rebate for ECM motors.*
- *Need to work on better rebates for high efficiency equipment like geothermal heat pumps. Better promotions and co-branding with contractors to get the word out on high efficiency equipment*
- *You are missing a huge opportunity to reduce the peak demand. Inverter driven variable capacity AC's are significantly more efficient than traditional single stage (and even 2 stage) AC's. They should be included in this program, or even be the program. This program currently disincentivizes purchasing more efficient equipment. It is hard enough to get customers to buy higher quality, more efficient equipment, the 15 SEER rebate especially, hurts your cause by making it more difficult to get customers to buy higher efficient equipment.*
- *15 seer equipment is hurting your program in my eyes. I believe that you should rewarding customers for upgrading to high efficient equipment 20-25 seer modulating heat pumps or A/C. Take a look at the Lennox XP25-036-230 or the XP20-036-230*
- *Part if the issue of the program before was the ability to fill in a box and move on. We would love to determine a better way to capture those customers who have a low EA report score and educate them to go ahead and do the work. The technicians don't understand the value or don't know how to explain to the customer the necessary upgrades that should be taken. Figuring out how to train and educate them would possibly drive more EA improvements and duct alterations. it is a training and educational program. Possibly even starting at the Trade School Level. Teaching students the importance of proper testing and how to fix. (good luck on that) There is a missing link on the EA work getting back to the person at the office who could actually follow up and possibly educate person on what to do. That is on our end. If there was a way to get a weekly report card or even daily feedback on scores. I had no idea how many customers had scored so low and that our technicians didn't even make recommendations. Open to suggestions on how to better track and improve...*
- *Advertising and support for the insulation and air sealing program to make customers aware of its' existence.*
- *Appears to be very thorough.*
- *Bigger rebates on higher efficiency equipment, look at BPU's rebate schedule.*

Program Suggestions

Is there anything missing from KCP&L's programs related to energy efficiency? This could include rebates currently offered or something that is not currently being offered. - continued

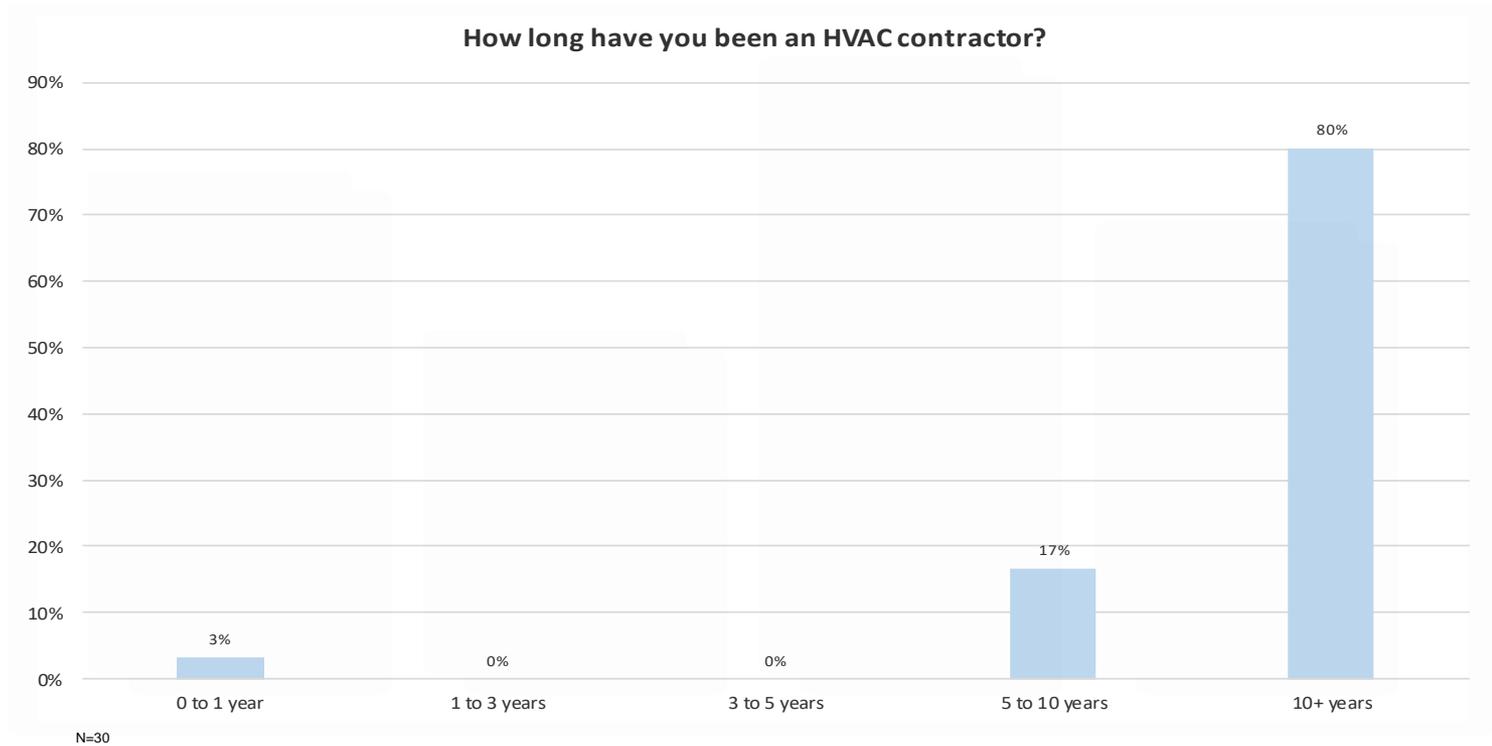
- *Better consumer awareness campaign, as so many of our MO customers don't appear to know anything about the programs available. They all seem to think that KCP&L only offers a NEST thermostat, and think that is what I am referring to when mentioning the available rebates.*
- *Very dissatisfied with you cutting the cost in half for the eff. analysis. You never stated that the repairs were waited in an effort to value the programs cost until after it almost expired. All contractors at your last council meeting agreed it would have changed their reporting. in turn adjust your kw hour savings. information after the fact is wasted information. I do not know if i will stay with your program as a result*
- *Need better clarity on rebates. All units that meet qualifications are not honored. Example: A 15 seer heat pump or AC has to be matched with a same brand furnace and/or coil to be eligible for the rebate. Customers are calling your rebate center and are being told that if its a 15 seer unit it WILL qualify, and that is not always the case. Then we are in hot water with our customers because they were misguided by your rebate reps.*

Rebate Feedback

What if any feedback do you have on the rebate amounts offered by KCP&L?

- *it does help*
- *The only heat pump benefits is for customers already all electric. It is a small percentage of customers.*
- *Need to be higher and promoted*
- *higher rebates*
- *The 15 SEER Rebate should be eliminated entirely. There should be a rebate for inverter driven variable capacity units with teeth, say \$1,000 or more. You would strengthen that offer even more by eliminating less useful lower SEER offerings. If you did this, you could only eliminate the lower SEER rebate from the AC's and leave it on the Heat Pumps, this could help close the gap between AC and Heat Pump*
- *Get rid of the 15 seer rebate create a rebate for 20-25 seer modulating heat pumps and or A/C*
- *Bring blower rebates back up*
- *Think you should eliminate the "Failed AC & HP rebate and streamline the offerings. Might push consumers to replace equipment that has a failed condenser fan motor into upgrading their system. This has happened to us numerous times last year. Customer repairs the unit and kicks the can down the road.*
- *I like the Heat Pump rebate improving. We are going to make a concentrated effort to drive more heat pump sales.*
- *The ECM rebate should remain 150.*
- *An increase in the amounts would definitely be beneficial- example: \$500 instead of \$400, reinstate the \$150 for the ECM motors, not \$75.*

Company Demographics



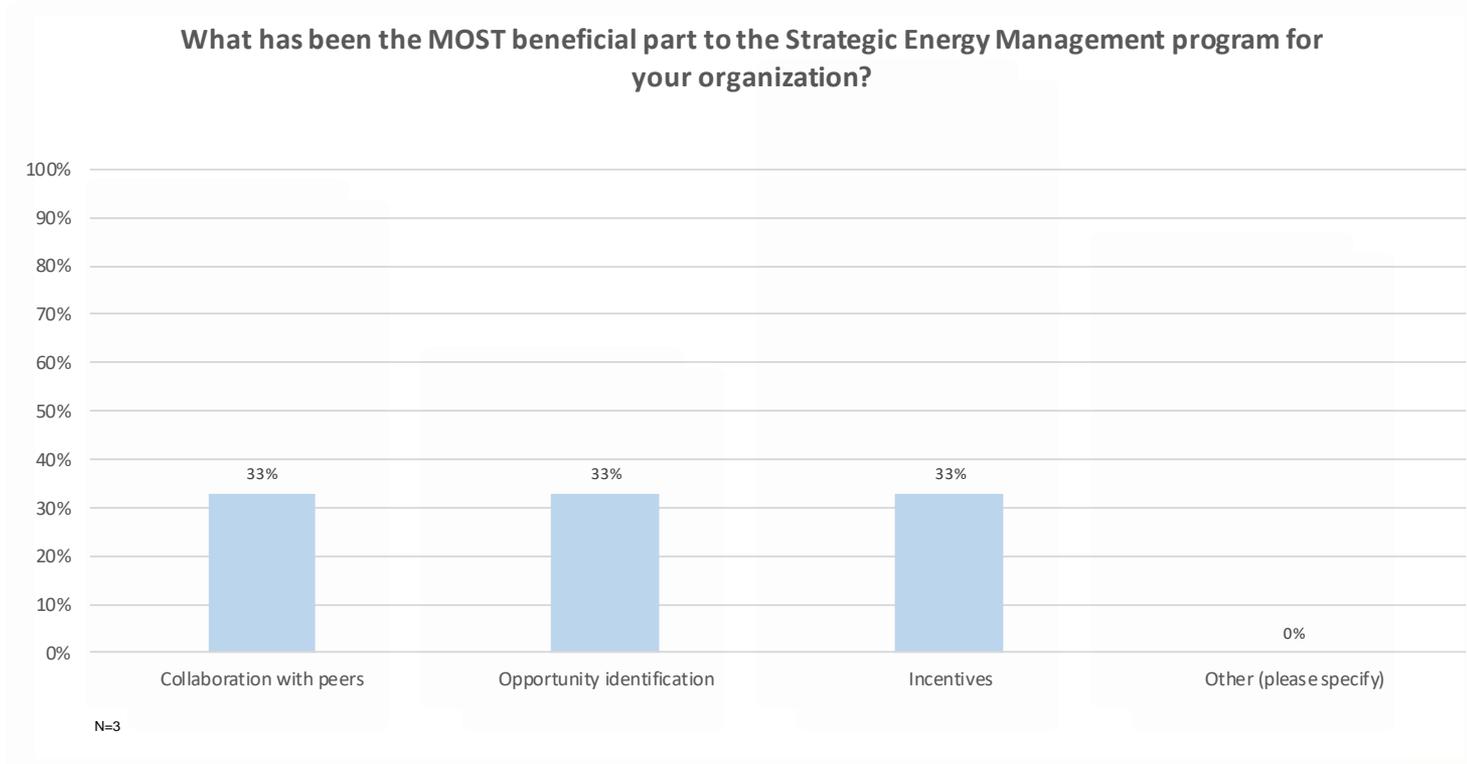
MEEIA III
Strategic Energy Management
Customer Research

December 2017

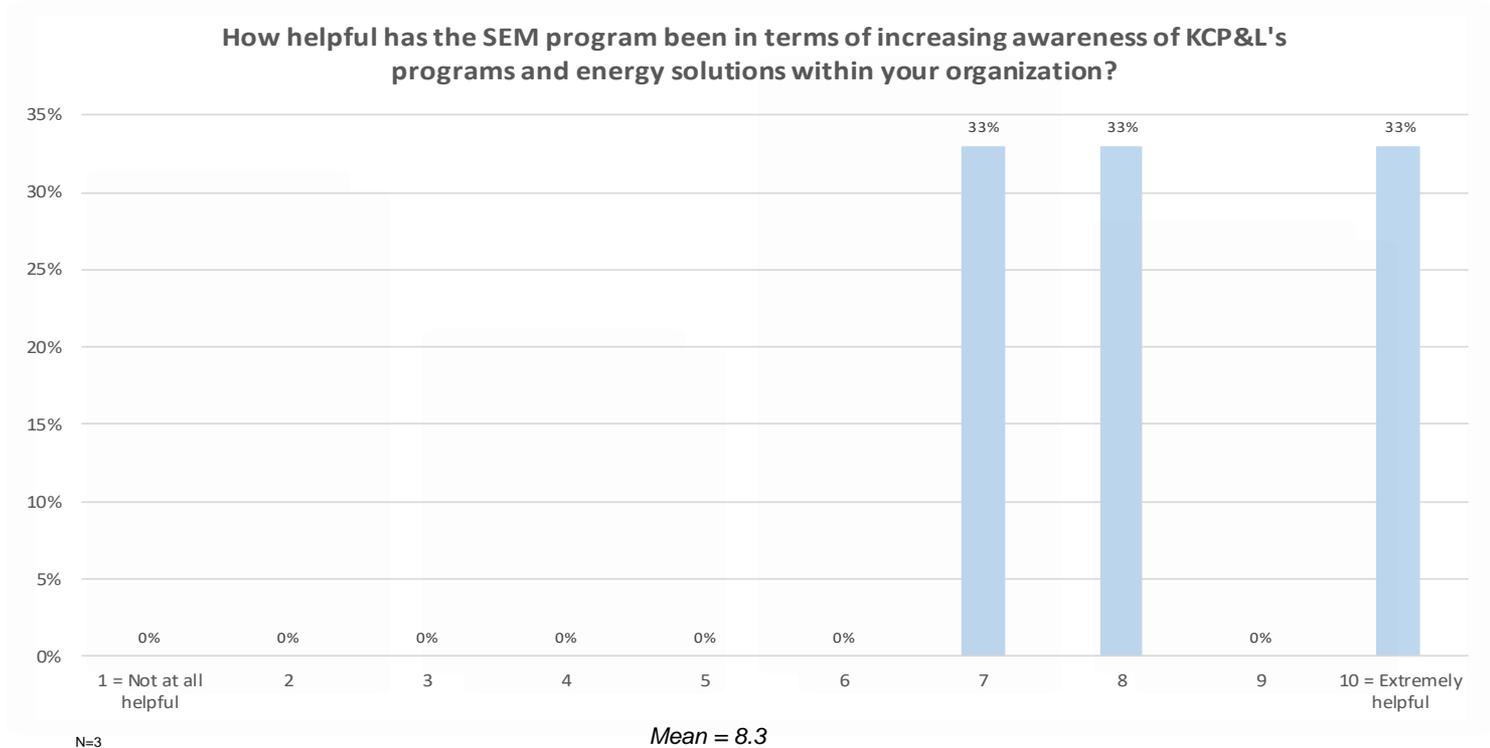
Note: Caution Small Sample Size



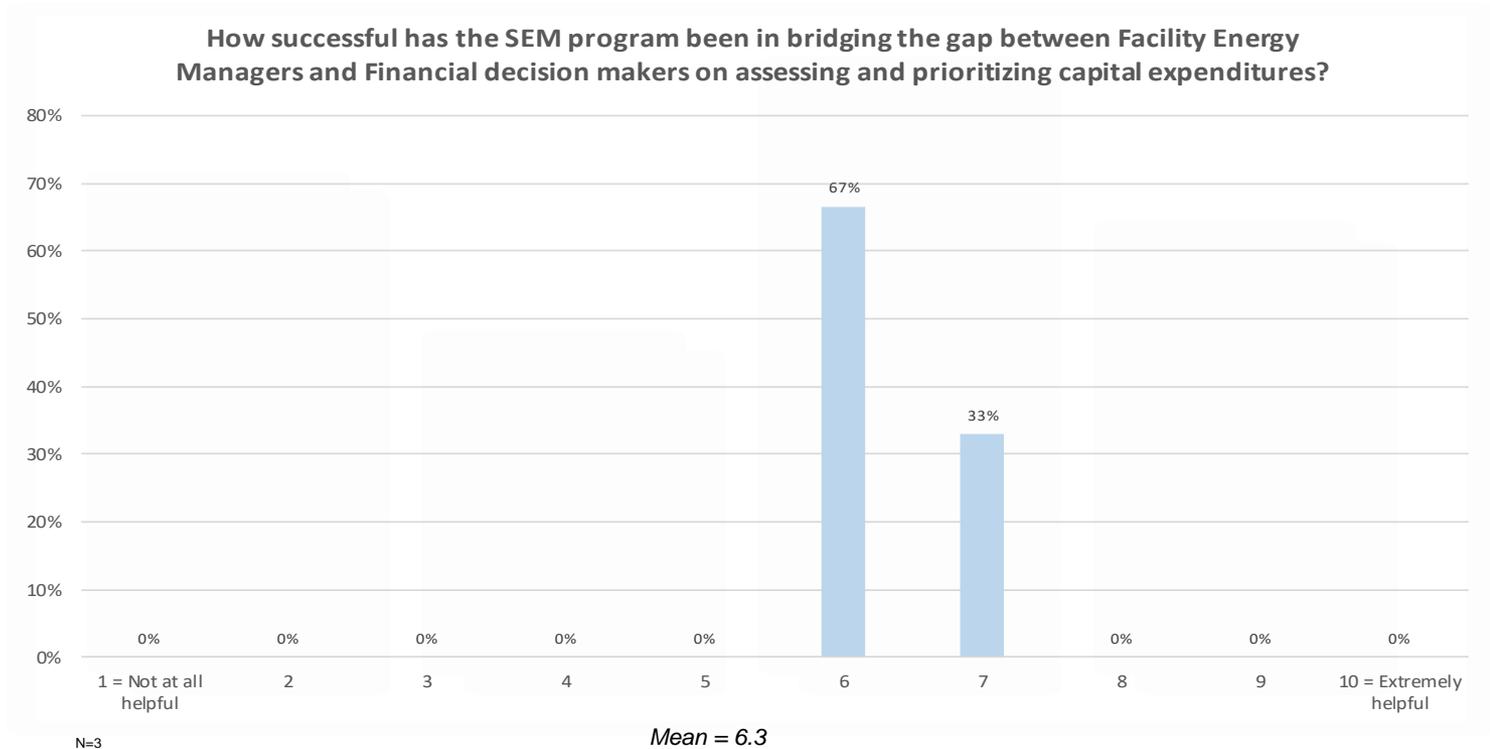
Strategic Energy Management Benefits



Helpfulness of SEM Increasing Awareness of KCP&L's Programs



Success in Bridging Gap

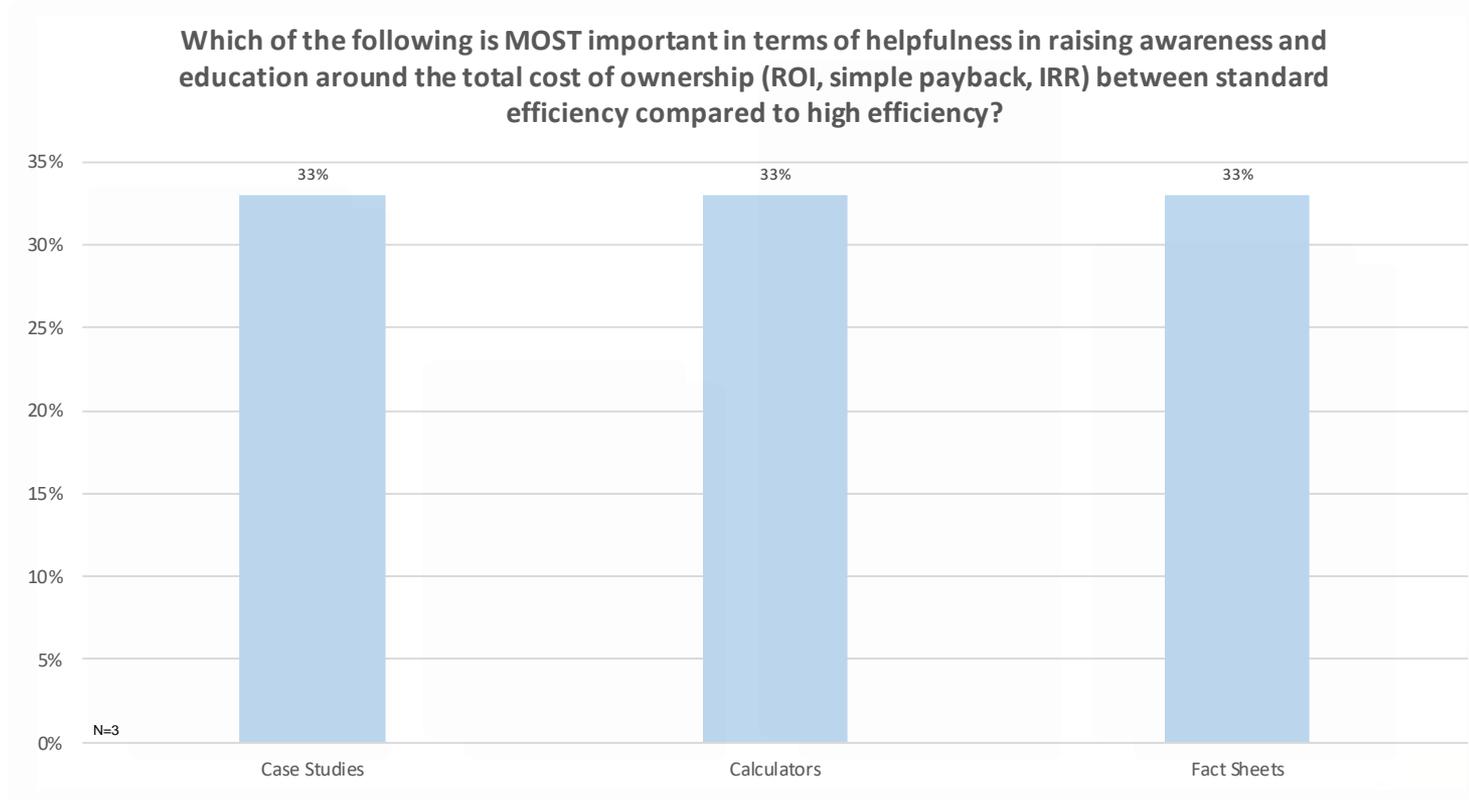


Suggestions on Influencing Procurement

How has/can the SEM program influence procurement practices for common O&M purchases that often are not incented under KCP&L's rebate programs?

- *I really don't know at this point. I do know the rebate programs have helped push some things through that normally would not have happened.*
- *We have changed our standard light fixtures to a fixture that qualifies for the rebates in all of our new construction projects.*
- *I don't think it can in our situation.*

MOST Important in Raising Awareness

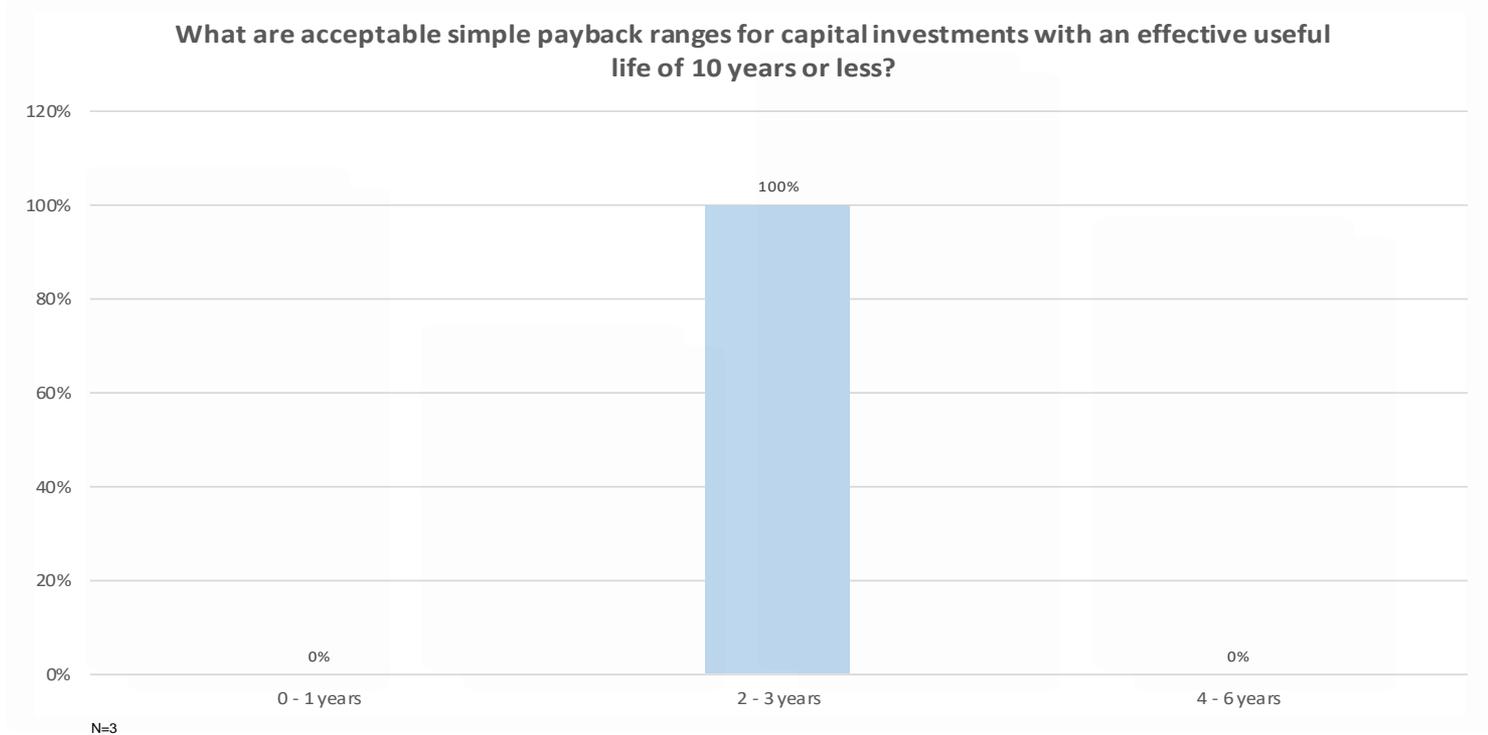


Improvements

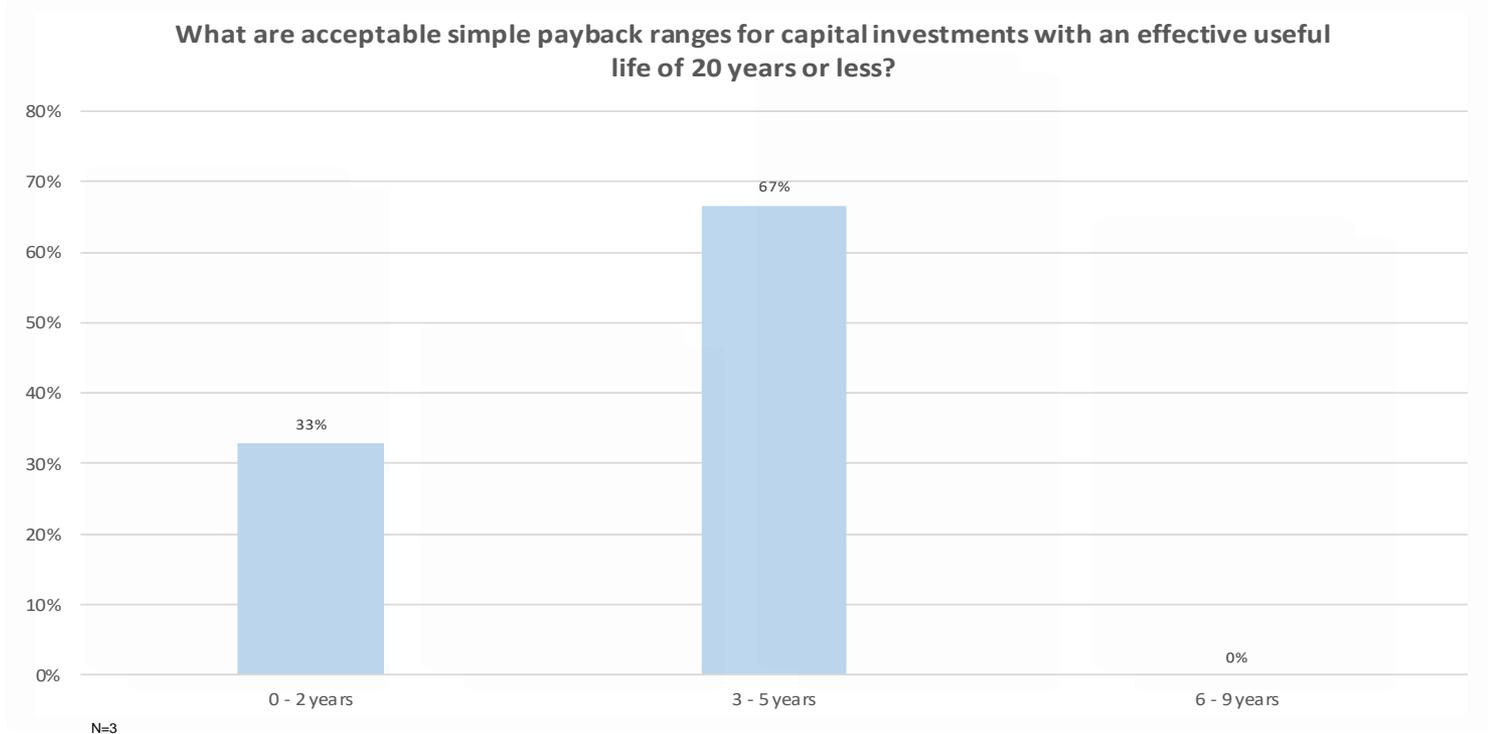
How can the SEM program be improved for future cohorts?

- *The program overall is a good program to help KCPL customers realize the impact it can have on the bottom line. To me they seem to be doing everything they can do.*

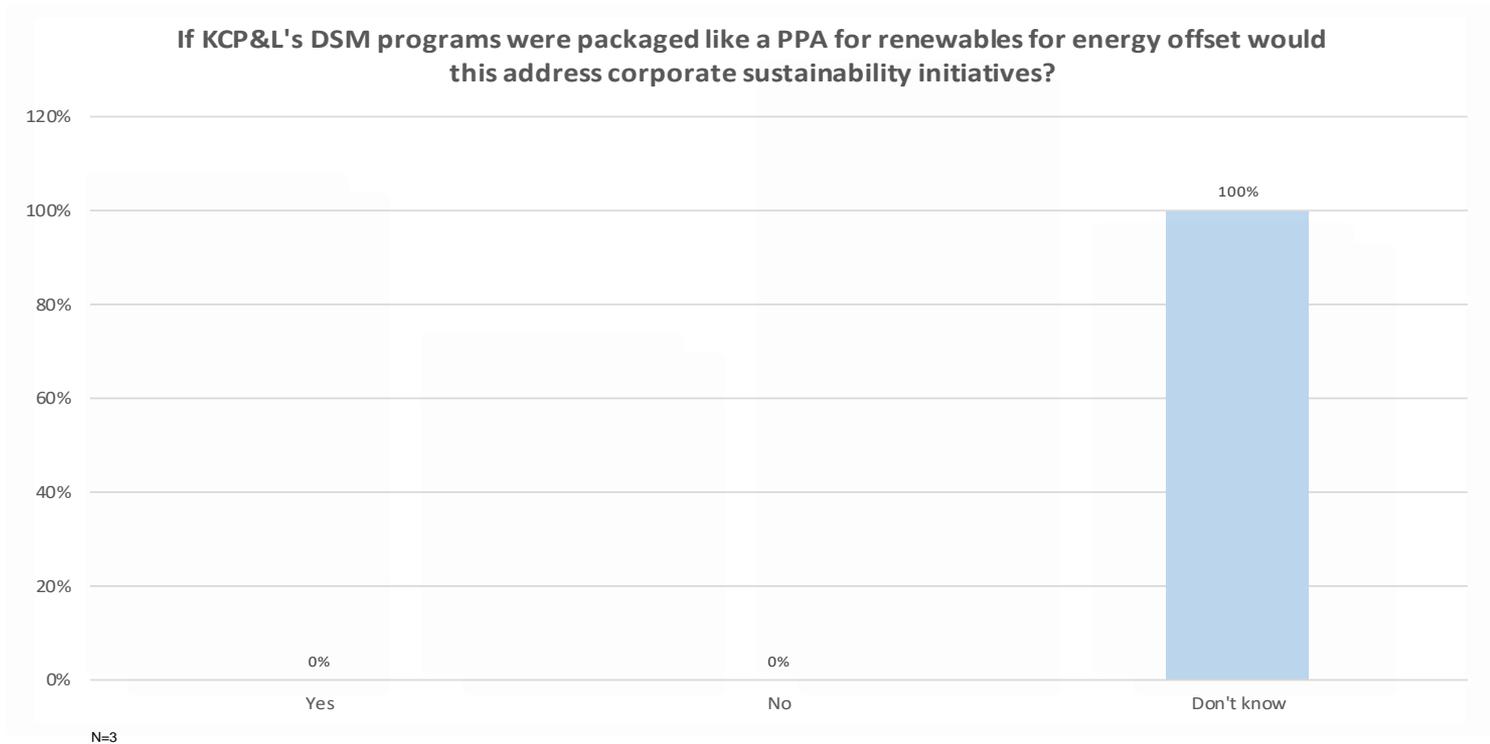
Acceptable Payback Periods



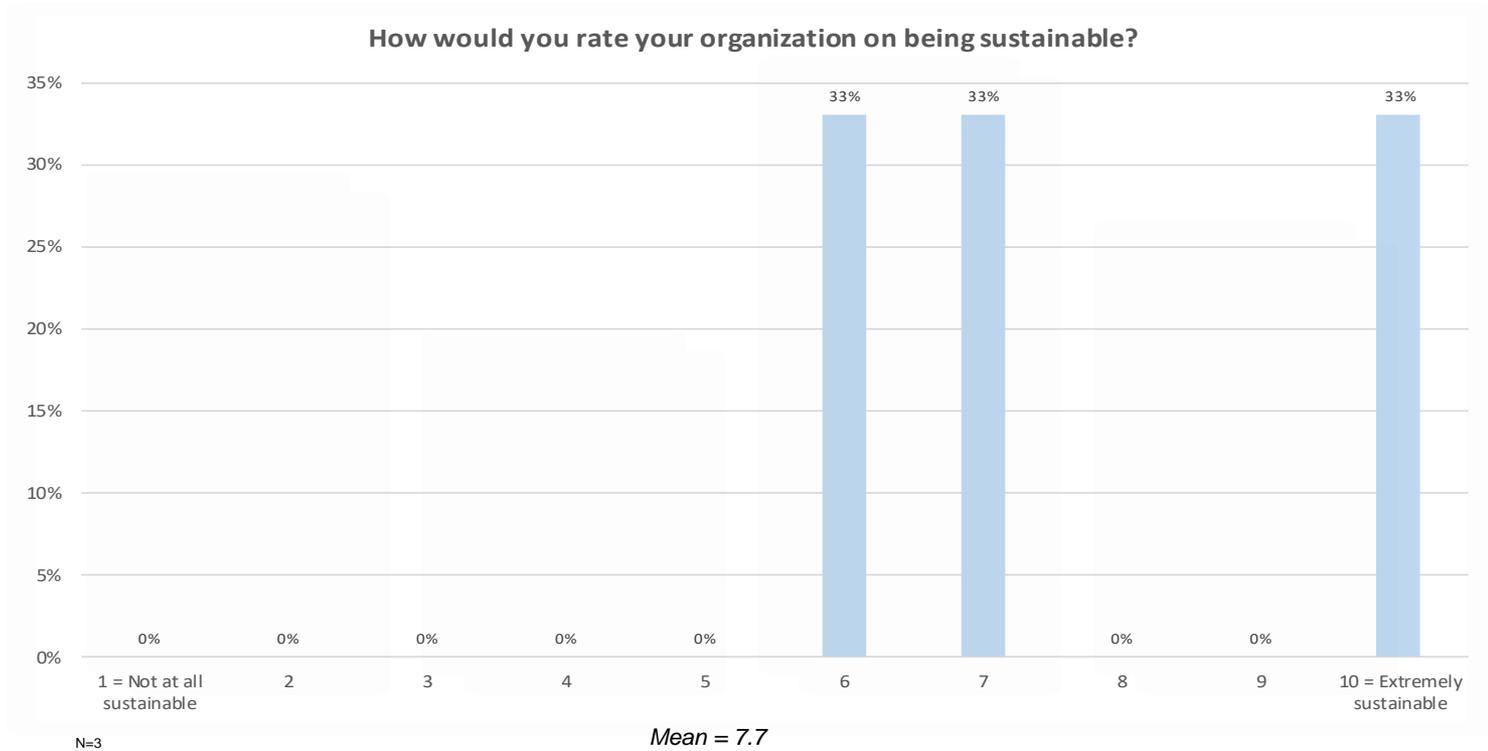
Acceptable Payback Periods



Corporate Sustainability Initiatives



Organization Sustainability



MEEIA III
Tier 1
Customer Research

December 2017

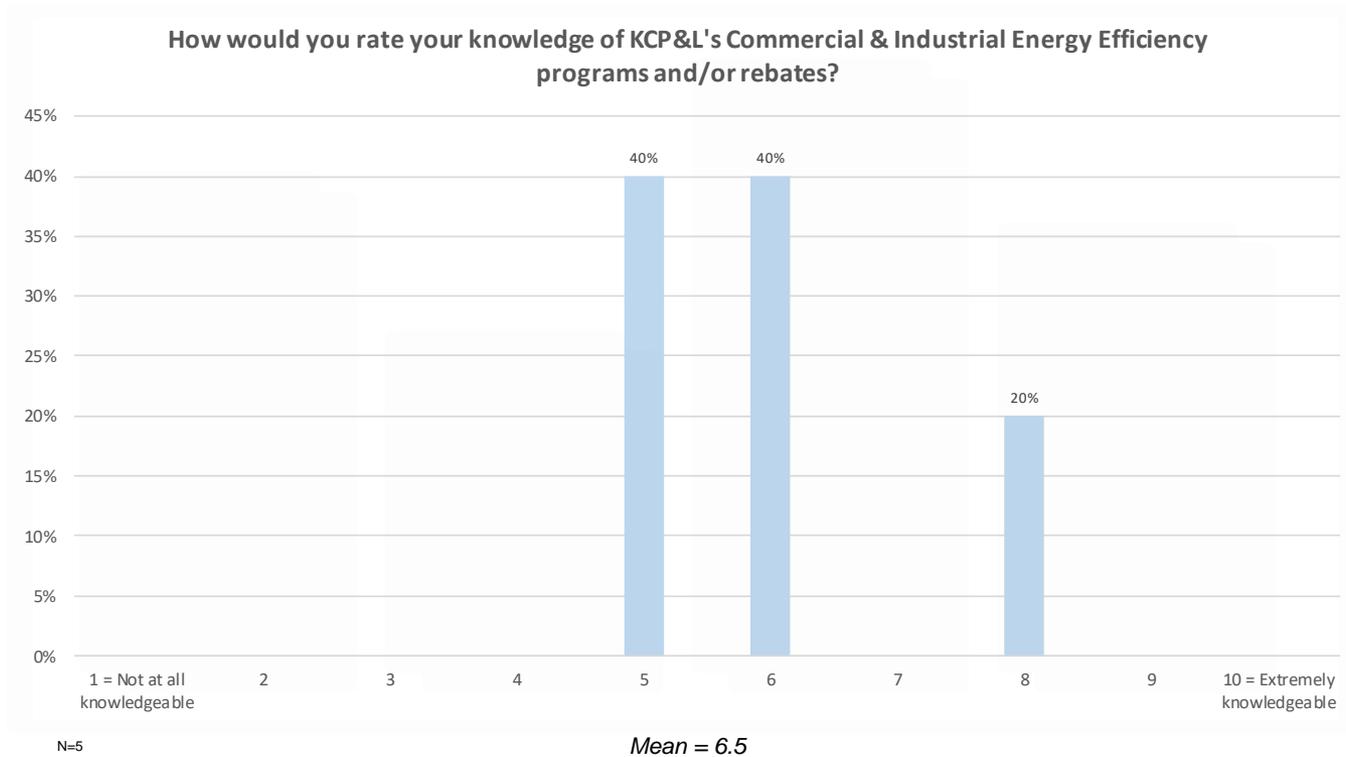
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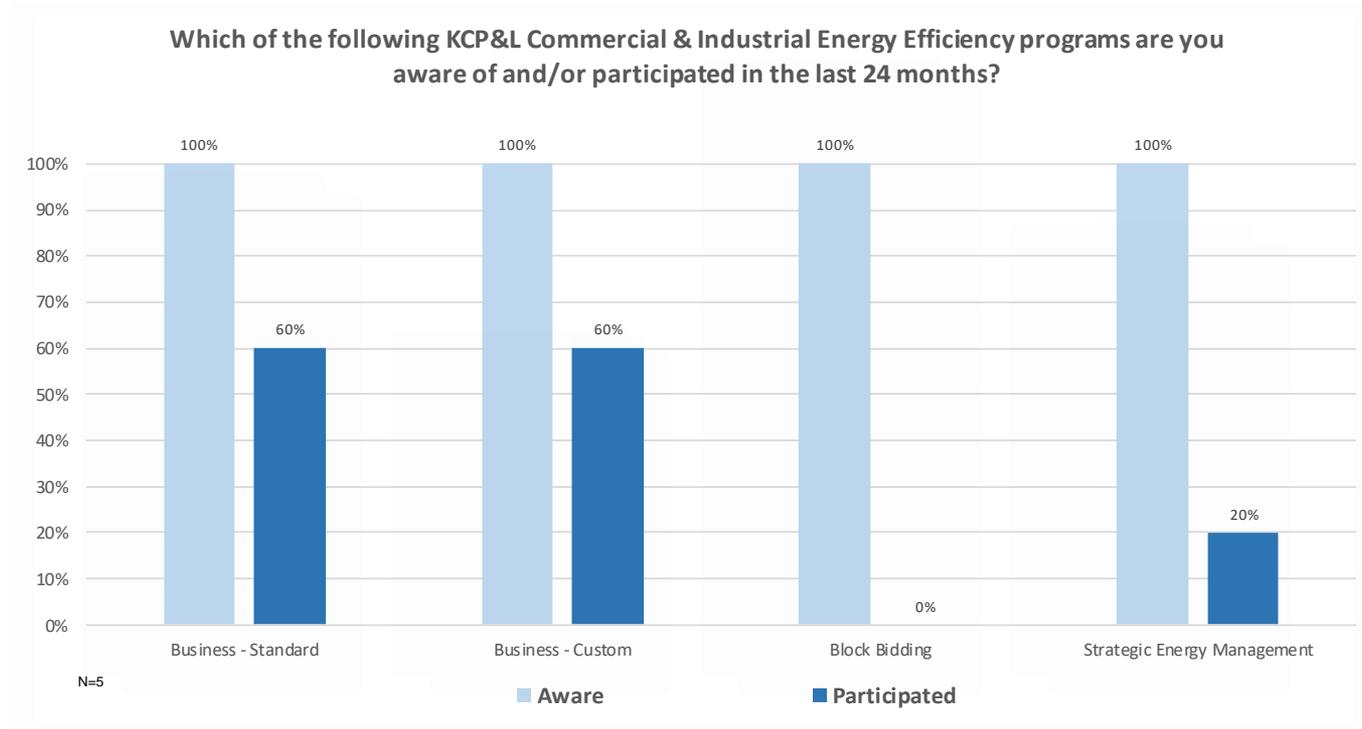
Summary of Findings

- Tier 1 customers surveyed are aware of KCP&L's Energy Efficiency programs but do not consider themselves to be extremely knowledgeable of them
- Actual program participation is fairly low among those surveyed with none of them having participated in the Block Bidding program
- Lighting appears to be the most common project completed while Building Automation/Controls and HVAC have much smaller participation
- Purchase decisions for high efficiency premium investments are based on Total Cost of Ownership. It should be incorporated in the designing of KCP&L's programs and marketing materials
- Return on Investment is the most common way capital expenditures are presented to senior leadership
- 3-5 years is the most common simple payback range for capital investments with an effective useful life of 10 years or less
- All Capital Budgets are set annually for the Tier 1 customers surveyed
- Those surveyed feel like there is still opportunity to make their companies more energy efficient

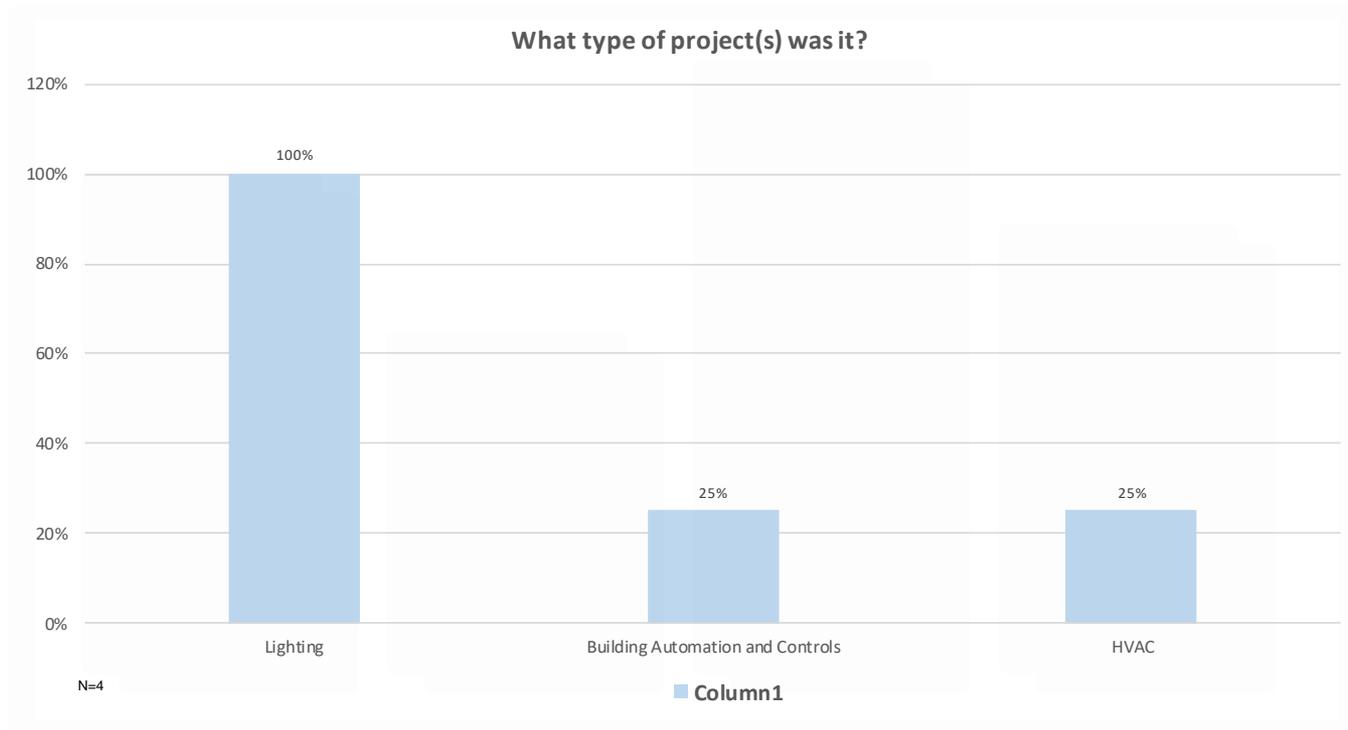
Knowledge of KCP&L's Commercial & Industrial Energy Efficiency Programs



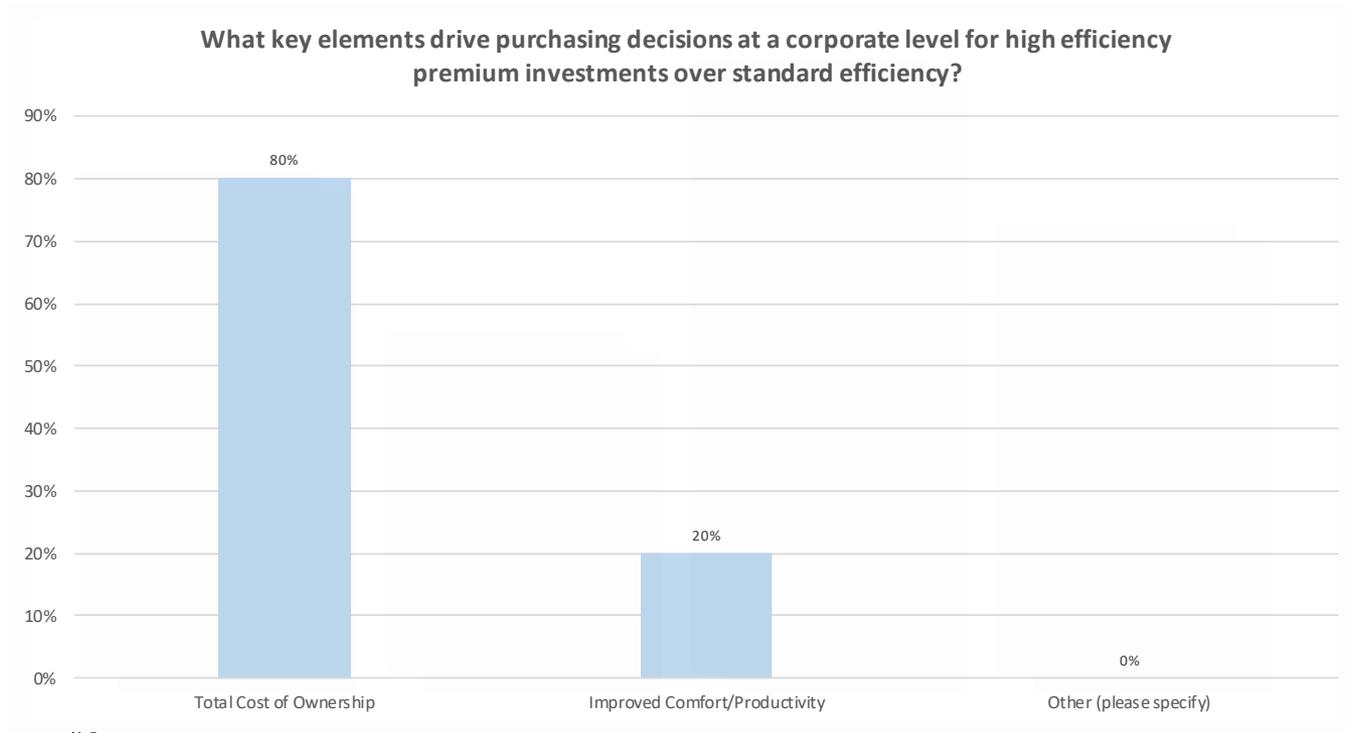
Awareness / Participation of KCP&L's C&I Energy Efficiency Programs



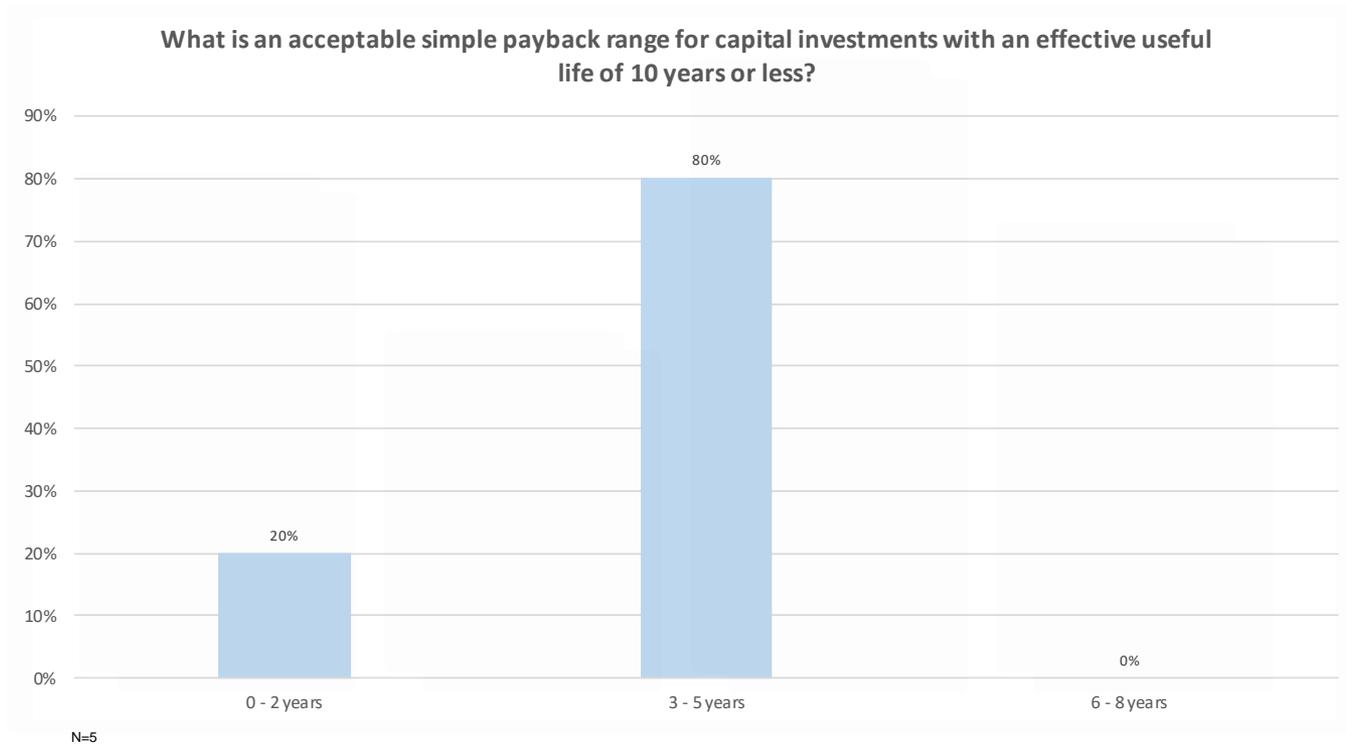
Types of Commercial & Industrial Energy Efficiency Program Participation



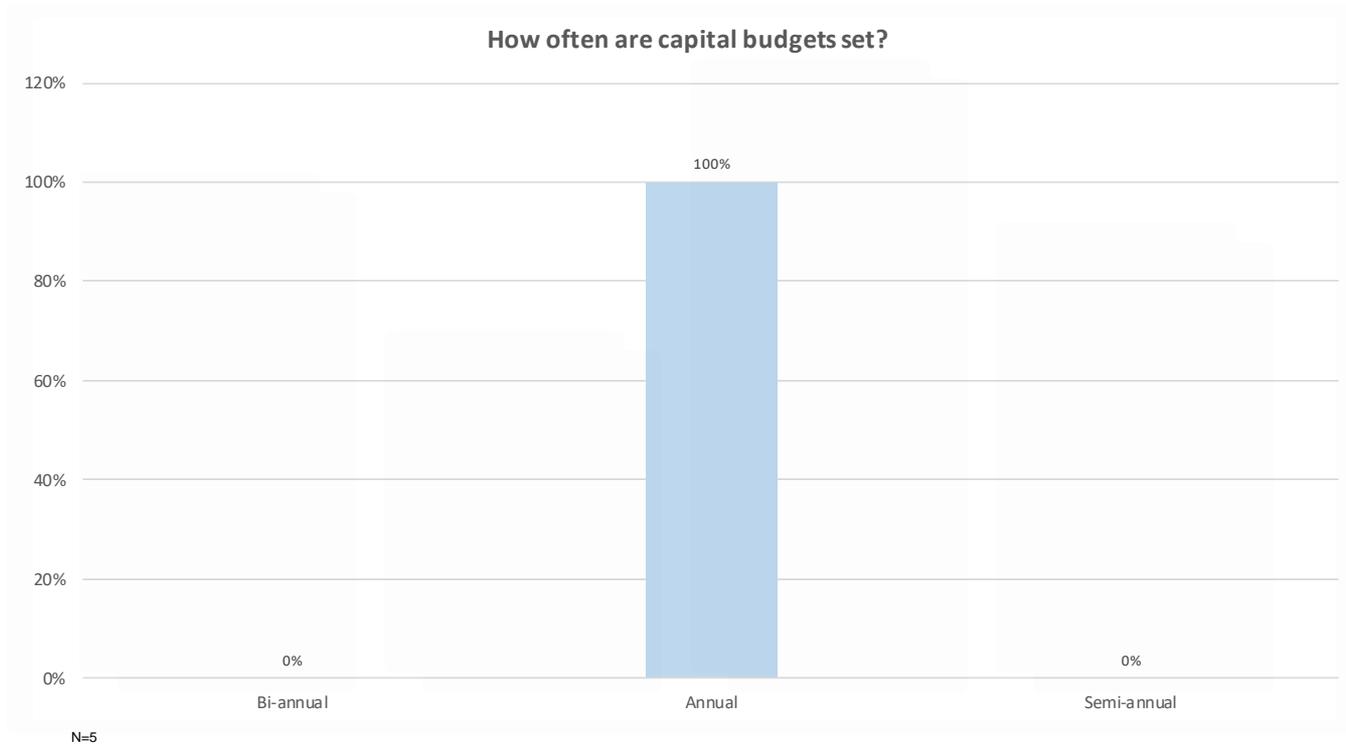
Key Elements Driving Purchase Decisions



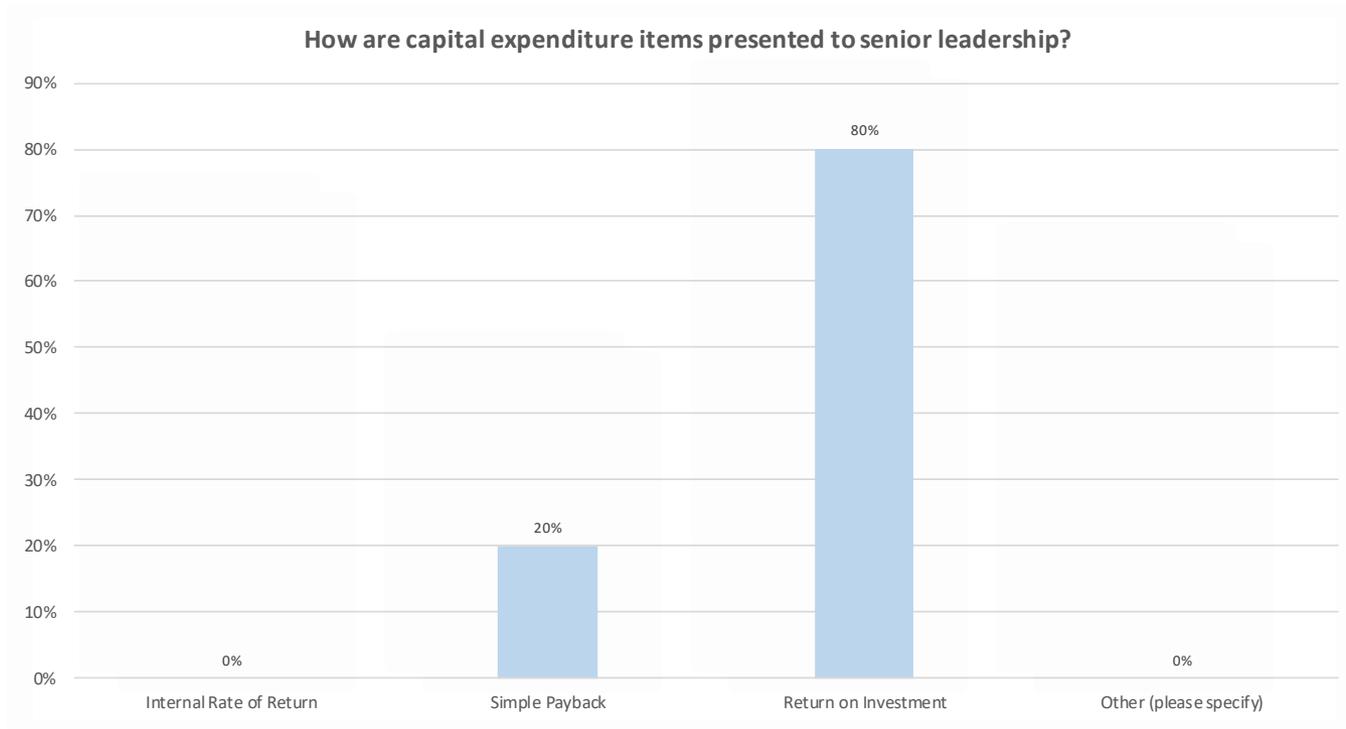
Acceptable Simple Payback Range



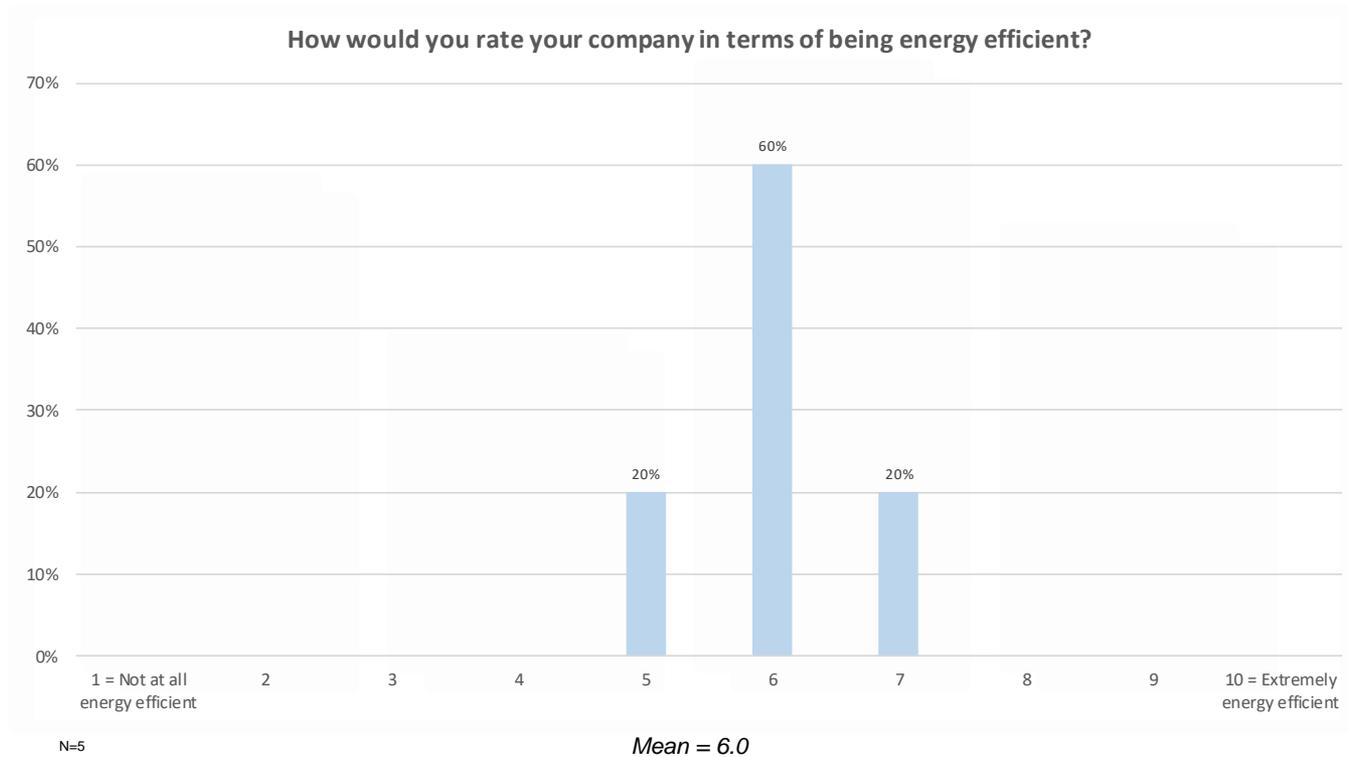
Capital Budget Process



Presenting Capital Expenditure Proposals



Company's Energy Efficiency



10

