In 2012 the American Gas Association (AGA) and the Consortium for Energy Efficiency (CEE) surveyed their U.S. and Canadian members and other efficiency program administrators on the status of their 2011 ratepayer-funded natural gas efficiency programs, including low-income weatherization. Based on survey findings for the 2011 program year:

- Natural gas utilities continue to help their customers to reduce energy usage and lower their annual energy bills by investing in successful and innovative efficiency programs, which include cash rebates and financial incentives, low-income specific programs, strategic partnerships, joint programs with other electric and gas utilities, efficiency loans, education campaigns, targeted marketing, energy audits, whole house projects, and customized retrofits of large facilities.

- Natural gas utilities fund 134 natural gas efficiency programs—128 in 39 states and six in Canada.

- Residential natural gas efficiency program participants in the U.S. saved on average 13 percent of household gas usage or about 99 Therm per year, averaging $107 in cost saving on their annual energy bill.

- In the United States, utilities invested nearly $958 million in efficiency programs in 2011. They also budgeted nearly $1.4 billion for the 2012 program year (which represents a growth of 46 percent compared to 2011 spending levels).\(^1\)

- In North America (U.S. and Canada), natural gas efficiency program spending approached $1.1 billion in 2011. Program budgets are set at about $1.5 billion for the 2012 program year (projecting a 43 percent increase in spending).

- U.S. spending on evaluation, measurement and verification activities approached $15.5 million in 2011, and it is estimated to reach $34.5 million in 2012 (a 123 percent increase).

- On a revenue basis, median spending for utilities on efficiency programs was 1.5 percent of net natural gas distribution revenues in 2011 (i.e. net of gas costs)—ranging from less than 0.1 percent to 15 percent of net revenues.

- In 2011 U.S. customers saved 125 trillion Btu through natural gas efficiency programs, thus offsetting 6.5 million metric tons of carbon dioxide (CO\(_2\)) emissions (a 55 percent increase from the 80.8 trillion Btu achieved in 2010).

- In North America (U.S. and Canada), natural gas savings impacts from efficiency programs approached 204 trillion Btu in 2011—the equivalence of 10.6 million metric tons of avoided CO\(_2\) emissions (a 51 percent increase from the 135 trillion Btu achieved in 2010).

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\(^1\) The survey samples for 2011 expenditures and 2012 budget are similar but not identical.
• Seventy-six percent of rate-payer funded programs provide natural gas efficiency programs to low income customers, and 70 percent of all programs provide low- or no-cost weatherization assistance.

• Twenty-six states require utilities to fund natural gas efficiency programs, and 27 states mandate that they implement weatherization and/or energy efficiency programs specifically for low-income customers.

• Thirty-eight states permit utilities to recover natural gas efficiency program costs, 31 allow them to recoup lost margins related to program implementation, and 18 approve financial incentives to reward efficiency program implementation or performance.

• Recovery of natural gas efficiency direct program costs are allowed via the following mechanisms:
  - special tariff or rider in 26 states
  - base rates in 16 states
  - system benefits surcharge in eleven states
  - deferral accounts in eleven states
  - other mechanisms in two states

• Twenty-seven percent of regulator-approved natural gas efficiency programs permit fuel switching, and 14 percent measure efficiency from the energy source to the usage site by applying a full fuel cycle analysis.