



Customer Awareness Advertising Campaign Research

Pacific Power and Rocky Mountain Power

Prepared by

Marlene Holm & Jakob Lahmers

Market Decisions Corporation

(503) 245-4479

Marlene@mdcresearch.com

JakobL@mdcresearch.com



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Research Objectives & Methodology

Objectives

- The primary objective of the Pacific Power and Rocky Mountain Power Customer Awareness Advertising Campaign Research is to measure the advertisement awareness and effectiveness of the “Let’s Turn the Answers On” campaign, which launched in January 2009.
- In addition, this research will help PacifiCorp gauge whether there has been an increase in customer satisfaction and/or company image since the advertising campaign launched.
- This report presents findings for the third wave, conducted in May/June 2011.

Methodology

- A total of one thousand (n=1,000) interviews were conducted with residential customers, evenly divided between Pacific Power and Rocky Mountain Power.
 - The interviews were conducted by telephone between May 23, 2011 and June 5, 2011. All participants were interviewed by Market Decisions’ in-house research associates.
 - A list of 34,680 Pacific Power and Rocky Mountain Power residential customers was provided by PacifiCorp.
- All respondents were screened to meet the following criteria:
 - Customer of Pacific Power or Rocky Mountain Power
 - Involved with decisions regarding electric utility
- For this wave of the research a stratified random sampling plan was utilized:

Pacific Power (n=500)			Rocky Mountain Power (n=500)		
Aware		Non-Aware	Aware		Non-Aware
n=300		n=200	n=300		n=200
Oregon	Washington	California	Utah	Wyoming	Idaho
n=200	n=150	n=150	n=200	n=150	n=150

Methodology (cont.)

- The stratified sampling plan was designed to provide sufficient sample sizes to allow analysis of results by state; however, in order to analyze the data in aggregate (i.e., Pacific Power, Rocky Mountain Power, Ad Aware and Ad Non-Aware) the data must be weighted.
 - The data was weighted to be representative of the customer base (counts provided by PacifiCorp):

Pacific Power			Rocky Mountain Power		
Oregon	Washington	California	Utah	Wyoming	Idaho
555,070	126,665	45,148	787,550	133,770	70,281

- Weights were calculated for three sections of the survey as well as for total, Pacific Power, Rocky Mountain, Ad Aware and Ad Non-Aware. The weights are included in the appendix.
- The maximum sampling variability for each customer segment at the 95% confidence level is shown below:
 - Total (n=1,000) yields a maximum sample variability of +/-3.10% at the 95% confidence level.
 - Pacific Power/Rocky Mountain Power (n=500) yields a maximum sample variability of +/-4.4% at the 95% confidence level.
 - Ad Aware (n=600) yields a maximum sample variability of +/-4.0% at the 95% confidence level.
 - Ad Aware by Pacific Power/Rocky Mountain Power (n=300) yields a maximum sample variability of +/-5.7% at the 95% confidence level.
 - Ad Non-Aware (n=400) yields a maximum sample variability of +/-4.9% at the 95% confidence level.
 - Ad Non-Aware by Pacific Power/Rocky Mountain Power (n=200) yields a maximum sample variability of +/-6.9% at the 95% confidence level.
 - Oregon/Utah (n=200) yields a maximum sample variability of +/-6.9% at the 95% confidence level.
 - Washington/California/Wyoming/Idaho yields a maximum sample variability of +/-8.0% at the 95% confidence level.



Key Findings

- Overall awareness of Pacific Power and Rocky Mountain Power increased in 2011.
 - Ad Aware: Pacific Power 96%; Rocky Mountain Power 91%
 - Ad Non-Aware: Pacific Power 88%; Rocky Mountain Power 90%
- Although company awareness grew, reported advertising/communication awareness dropped for both Pacific Power and Rocky Mountain Power.
 - Pacific Power Aware: 63% 2009, 57% 2010 and 50% 2011.
 - Rocky Mountain Power: 67% 2009, 66% 2010 and 58% 2011.
- Rocky Mountain Power Ad Aware customers indicate that they were exposed to 18 ads on average compared to 14 among Pacific Power Ad Aware customers.
- The advertisements/communications from Pacific Power/Rocky Mountain Power have had a positive impact on customer perceptions of the company.
 - One third (35% Pacific Power; 38% Rocky Mountain Power) of Ad Aware customers say that the ads have “very favorably” affected their opinion of their electric utility.
 - Less than one fifth (14%) of customers rate the impact as “unfavorable.”
- Television and newspapers remain the primary sources for news and current events. However, websites have increased significantly as a source for both news and utility information.
 - Ad Aware customers are more likely to utilize television (67%), newspaper (43%) and radio (18%) as news sources.
- The top three most frequently recalled messages remain using energy wisely, energy efficiency programs and renewable or alternative energy.
 - Renewable or alternative energy has seen a significant decrease in importance across both utilities since 2009.
 - Pacific Power has seen a decrease in importance ratings for using energy wisely and energy efficiency programs since 2009.



Key Findings

- The perception of ads and communications from Pacific Power and Rocky Mountain Power remains useful, informative, believable and likeable.
 - However, the percentage of Pacific Power customers who strongly agree the ads are informative has declined since 2009 (49% 2011 vs. 58% 2009).
- Recall of “Let’s Turn the Answers On” and “Being Wattsmart” is significantly higher among Rocky Mountain Power customers and Ad Aware customers.
 - “Let’s Turn the Answers On” – Ad Aware 44% vs. 15% Ad Non-Aware and Rocky Mountain Power 37% vs. Pacific Power 20%.
 - “Being Wattsmart” – Ad Aware 65% vs. 25% Ad Non-Aware and Rocky Mountain Power 57% vs. Pacific Power 33%.
- One in five (21%) Pacific Power and two in five (39%) Rocky Mountain Power customers report having taken action based on the advertisement or communication seen from the company.
 - Rocky Mountain Power saw a significant increase in those that took action (39%) when compared to 2009 (30%) and 2010 (30%).
 - The three most frequently mentioned actions taken, mentioned by one in five or more, are: purchased/switched to energy efficient appliances/lights, more aware of power usage and enlisting in utility incentive/rebate program.
- Roughly a third of customers are aware that Pacific Power/Rocky Mountain Power offer energy efficiency programs.
 - Highest awareness is seen in Utah (42%).
 - Oregon customers (19%) have the lowest recall of a specific program and Utah has the highest (32%).
 - Total awareness of specific programs range from a low of 27% for “Low Income Weatherization” in Utah to a high of 81% for “See Ya Later, Refrigerator” in Washington.

2009-2011: Ad Aware Customers

Ad Aware Customers Differences 2009-2011	2009	2010	2011
% very satisfied overall with company	79%	73%	72%
Company awareness (aided + unaided): Pacific Power	90%	87%	96%
Company awareness (aided + unaided): Rocky Mountain Power	90%	87%	91%
Unaided company awareness: Pacific Power	77%	77%	90%
Unaided company awareness: Rocky Mountain Power	66%	70%	73%
% who are very favorable toward <i>UTILITY</i> as a result of ad/communications	30%	34%	36%
% who see, hear or read <i>UTILITY</i> advertisements via TV	40%	61%	60%
% who see, hear or read <i>UTILITY</i> advertisements via bill inserts	37%	19%	25%
% who see, hear or read <i>UTILITY</i> advertisements via direct mail	18%	10%	11%
% who recall message of renewable or alternative energy (unaided)	21%	13%	16%
% who strongly agree messages are informative	51%	47%	51%
% who recall "Let's Turn the Answers On"	23%	33%	44%
% who took action based on advertisement	27%	26%	31%

RED = significant difference with 2009

BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010



2009-2011 : Ad Non-Aware Customers

Ad Non-Aware Customers Differences 2009-2011	2009	2010	2011
Company awareness (aided + unaided): Pacific Power	72%	66%	88%
Company awareness (aided + unaided): Rocky Mountain Power	74%	62%	90%
Unaided company awareness: Pacific Power	62%	55%	79%
Unaided company awareness: Rocky Mountain Power	51%	44%	77%
% who rely on TV for news and current events	68%	62%	57%

RED = significant difference with 2009

BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010

Ad Aware vs. Ad Non-Aware Customers

2011 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% who mentioned their electric utility top-of-mind unaided: Pacific Power	90%	79%
% who mentioned their electric utility unaided: Pacific Power	96%	88%
% recall "Let's Turn the Answers On"	44%	15%
% recall "Being Wattsmart"	65%	25%
% who say that their satisfaction with the UTILITY has increased over the past year	12%	6%
% who strongly agree UTILITY is committed to keeping customers safe around electricity	76%	69%
% who strongly agree UTILITY has plans to meet future energy needs	47%	38%
% who strongly agree UTILITY has programs that help protect the environment	42%	34%
% who strongly agree UTILITY provides reliable and dependable power: Rocky Mountain Power	74%	83%

RED = significant difference



Ad Aware vs. Ad Non-Aware Customers

2011 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% who typically rely on television as a source for information about news and current events	67%	57%
% who typically rely on newspaper as a source for information about news and current events	43%	30%
% who typically rely on radio as a source for information about news and current events	18%	13%
% who typically rely on bill inserts as a source for information about <i>UTILITY</i>	41%	34%
% who typically rely on television as a source for information about <i>UTILITY</i>	30%	11%
% who typically rely on newspaper as a source for information about <i>UTILITY</i>	14%	9%

RED = significant difference



Company & Advertising Awareness

- All Pacific Power and Rocky Mountain Power residential customers started the survey by mentioning electric utilities that come to mind on an unaided basis:
 - Q1 When you think of electric or gas utilities, what one company comes to mind first? (unaided company awareness)
- Advertising awareness was measured by asking customers “Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?” (Unaided advertising awareness).
- If their electric utility was not mentioned, customers were asked “Q4 During the past six months, do you recall seeing, hearing or reading any form of advertisements or communications from Pacific Power/Rocky Mountain Power?” (Aided advertising awareness).

Top of Mind Unaided Company Awareness 2009-2011

- Top of mind awareness for both Pacific Power and Rocky Mountain Power remain high.
 - Pacific Power top of mind awareness saw a significant increase in 2011 among both the Ad Aware and Ad Non-Aware audiences.
 - Rocky Mountain Power awareness has remained the same for Ad Aware customers and has significantly increased for Ad Non-Aware audiences in 2011.

2009 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=252)	Rocky Mt. Power (n=308)	Pacific Power (n=180)	Rocky Mt. Power (n=170)
Pacific Power/PPL	77%	3%	62%	4%
Rocky Mountain Power/Utah Power	0%	66%	1%	51%

2010 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=435)	Rocky Mt. Power (n=440)	Pacific Power (n=387)	Rocky Mt. Power (n=268)
Pacific Power/PPL	77%	2%	55%	5%
Rocky Mountain Power/Utah Power	<1%	70%	--	44%

2011 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=433)	Rocky Mt. Power (n=410)	Pacific Power (n=349)	Rocky Mt. Power (n=272)
Pacific Power/PPL	90%	1%	79%	1%
Rocky Mountain Power/Utah Power	--	73%	1%	77%

RED = significant difference with 2009
BLUE = significant difference with 2010
GREEN = significant difference with 2009 and 2010

Q1 When you think of electric or gas utilities, what **one** company comes to mind first?



Top of Mind Unaided Company Awareness 2011

- Ad Aware Pacific Power customers are significantly more likely to mention their utility company top of mind than Ad Non-Aware customers.
- Among those Ad Non-Aware, more than three fourths of Pacific Power customers (79%) and Rocky Mountain Power customers (77%) mention their utility first.

2011 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=433)	Rocky Mt. Power (n=410)	Pacific Power (n=349)	Rocky Mt. Power (n=272)
Pacific Power/PPL	90%	1%	79%	1%
Rocky Mountain Power/Utah Power	0%	73%	1%	77%
Pacific Gas & Electric/PG&E	3%	1%	5%	1%
Portland General/PGE	1%	0%	5%	0%
NW Natural	1%	0%	4%	0%
Avista	2%	0%	1%	0%
PacifiCorp	<1%	1%	1%	<1%
Mountain Fuel/Questar	0%	17%	0%	16%
Other	3%	7%	4%	7%
None	0%	0%	0%	0%

*Utilities are listed in decreasing order according to Pacific Power top of mind

Q1 When you think of electric or gas utilities, what **one** company comes to mind first?

 = significantly higher than Ad Non-Aware customers
 = significantly higher than Ad Aware customers

Total Unaided Company Awareness 2009 - 2011

- Customers were asked which electric or gas utility comes to mind first (top of mind) and which other utilities come to mind. The two questions combined yield total unaided awareness.
- Awareness of Pacific Power and Rocky Mountain Power increased in 2011.

2009 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=252)</i>	Rocky Mt. Power <i>(n=308)</i>	Pacific Power <i>(n=180)</i>	Rocky Mt. Power <i>(n=170)</i>
Pacific Power/PPL	90%	4%	72%	6%
Rocky Mountain Power/Utah Power	1%	90%	1%	74%

2010 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=435)</i>	Rocky Mt. Power <i>(n=440)</i>	Pacific Power <i>(n=387)</i>	Rocky Mt. Power <i>(n=268)</i>
Pacific Power/PPL	87%	3%	66%	6%
Rocky Mountain Power/Utah Power	<1%	87%	<1%	62%

2011 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=433)</i>	Rocky Mt. Power <i>(n=410)</i>	Pacific Power <i>(n=349)</i>	Rocky Mt. Power <i>(n=272)</i>
Pacific Power/PPL	96%	2%	88%	1%
Rocky Mountain Power/Utah Power	1%	91%	1%	90%

Q1 When you think of electric or gas utilities, what **one** company comes to mind first?

Q2 What other electric or gas utilities come to mind?

RED = significant difference with 2009

BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010



Total Unaided Company Awareness 2011

- Pacific Power Ad Aware customers are significantly more likely to be aware of Pacific Power than Pacific Power Ad Non-Aware customers.
- Rocky Mountain Power Ad Aware and Ad Non-Aware customers have similar recall of their utility.
 - Rocky Mountain Power Ad Aware customers are significantly more likely to be aware of Mountain Fuel/Questar than Rocky Mountain Power Ad Non-Aware customers.

2011 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=433)	Rocky Mt. Power (n=410)	Pacific Power (n=349)	Rocky Mt. Power (n=272)
Pacific Power/PPL	96%	2%	88%	1%
Rocky Mountain Power/Utah Power	1%	91%	1%	90%
Pacific Gas & Electric/PG&E	11%	3%	13%	3%
NW Natural	10%	1%	12%	0%
Avista	11%	0%	2%	0%
Portland General/PGE	6%	1%	6%	1%
Cascade	8%	<1%	3%	0%
Mountain Fuel/Questar	0%	55%	<1%	43%
Other	15%	18%	16%	15%

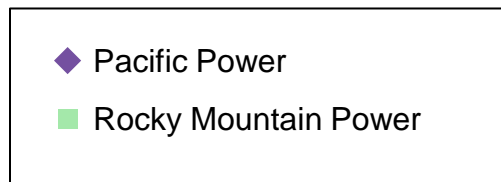
*Utilities are listed in decreasing order according to Pacific Power top of mind

- Q1 When you think of electric or gas utilities, what **one** company comes to mind first?
 Q2 What other electric or gas utilities come to mind?

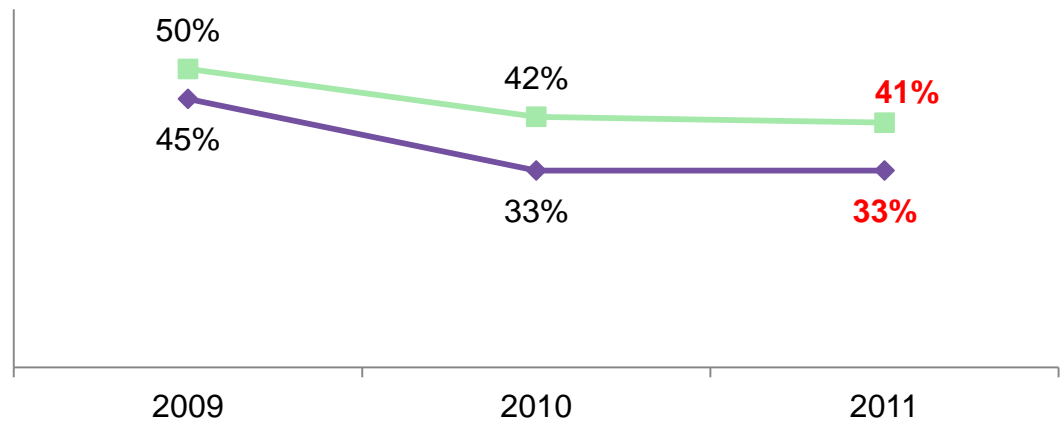
 = significantly higher than Ad Non-Aware customers
 = significantly higher than Ad Aware customers

Unaided Advertisement Awareness 2009-2011

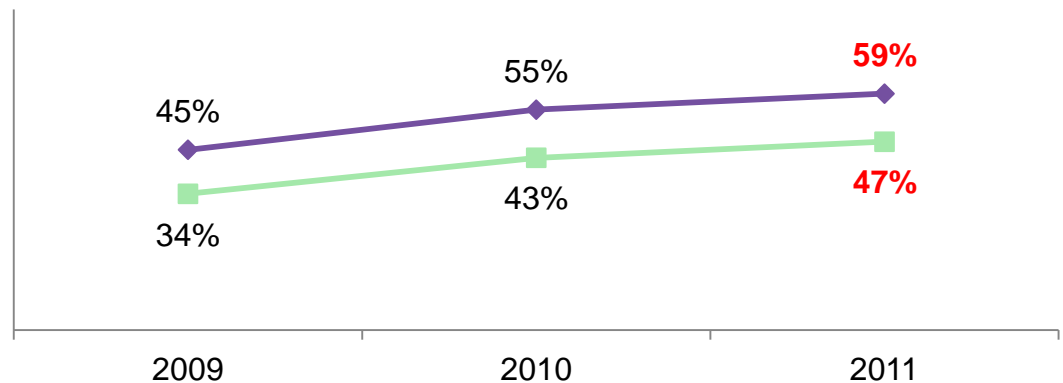
- 2011 results are consistent with 2010. Awareness of all utility advertisements and communications has decreased significantly when compared to 2009, with both Pacific Power and Rocky Mountain Power customers experiencing lower recall of their utility company's advertisements.
- There are no significant differences in awareness from 2010 to 2011.



% Unaided Utility Communication Awareness



% Unaided Not Aware of Any Utility Communications



RED = significant difference with 2009
 BLUE = significant difference with 2010
 GREEN = significant difference with 2009 and 2010

Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

Unaided Advertisement Awareness 2011

- Consistent with 2010, one third of Pacific Power and two fifths of Rocky Mountain Power customers recall an advertisement or communication from their electric company during the past six months (unaided).
- Roughly one fourth of Rocky Mountain Power customers have unaided recall of Mountain Fuel/Questar advertisements.

2011 Unaided Ad Awareness	Pacific Power (n=782)	Rocky Mt. Power (n=684)
Pacific Power/PPL	33%	1%
Pacific Gas & Electric/PG&E	4%	<1%
NW Natural	3%	0%
Portland General/PGE	2%	0%
Avista	2%	0%
PacifiCorp	1%	<1%
Mountain Fuel/Questar ←	<1%	25%
Rocky Mountain Power/Utah Power	0%	41%
Other	3%	5%
None	59%	47%

*Utilities are listed in decreasing order according to Pacific Power unaided ad awareness.

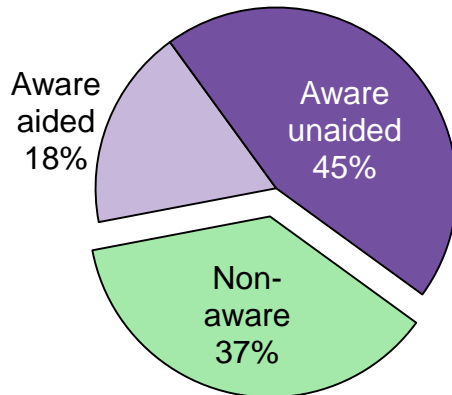
Q3 *During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?*

Total Advertisement Awareness

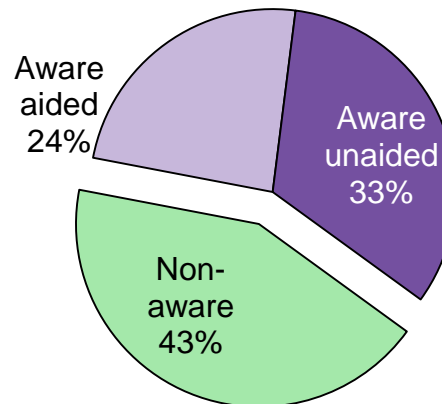
Pacific Power

- Total advertising recall combines unaided recall (previous pages) and aided recall of advertisements or communications during the past 6 months.
- In total, half (50%) of Pacific Power customers are aware of the company's advertisements or communications, again showing a significant decrease from the 2010 awareness of 57% and 2009 awareness of 63%.
 - The number of customers who are not aware of Pacific Power advertising (50%) saw a significant increase from 2010 (43%).

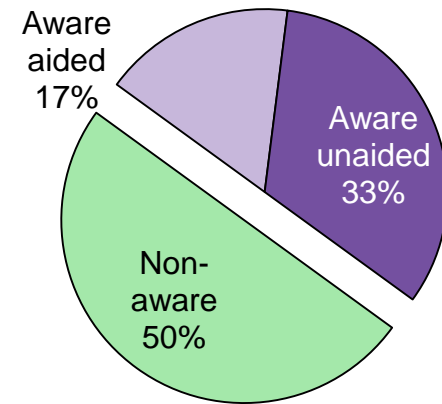
2009 Pacific Power
(n=403)



2010 Pacific Power
(n=760)



2011 Pacific Power
(n=782)



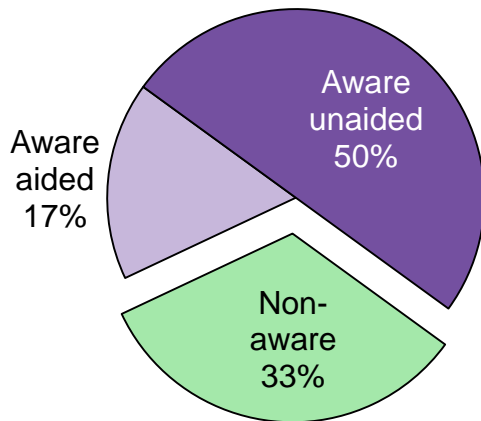
Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

Q4 During the past six months, do you recall seeing, hearing or reading any form of advertisements or communications from UTILITY?

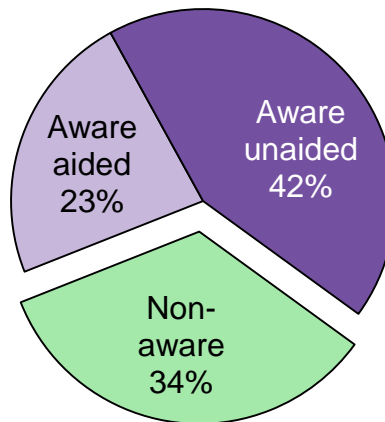
Total Advertisement Awareness Rocky Mountain Power

- In total, three fifths of Rocky Mountain Power customers are aware of the company's advertisements or communications, a significant drop from 2009 and 2010 awareness.
 - Unaided awareness remains consistent, while there is a significant decrease in aided awareness.
 - The number of customers who are not aware of Rocky Mountain Power advertising (42%) saw a significant increase from 2010 (34%).

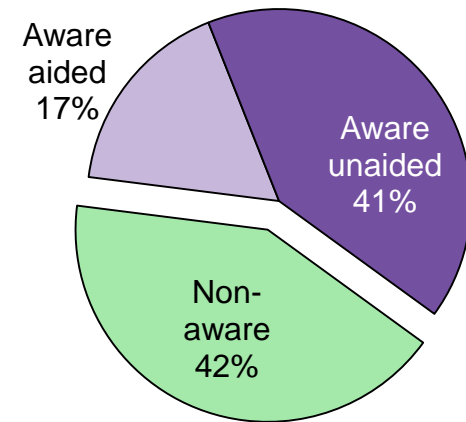
2009 Rocky Mountain Power
(n=456)



2010 Rocky Mountain Power
(n=665)



2011 Rocky Mountain Power
(n=684)



Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

Q4 During the past six months, do you recall seeing, hearing or reading any form of advertisements or communications from UTILITY?

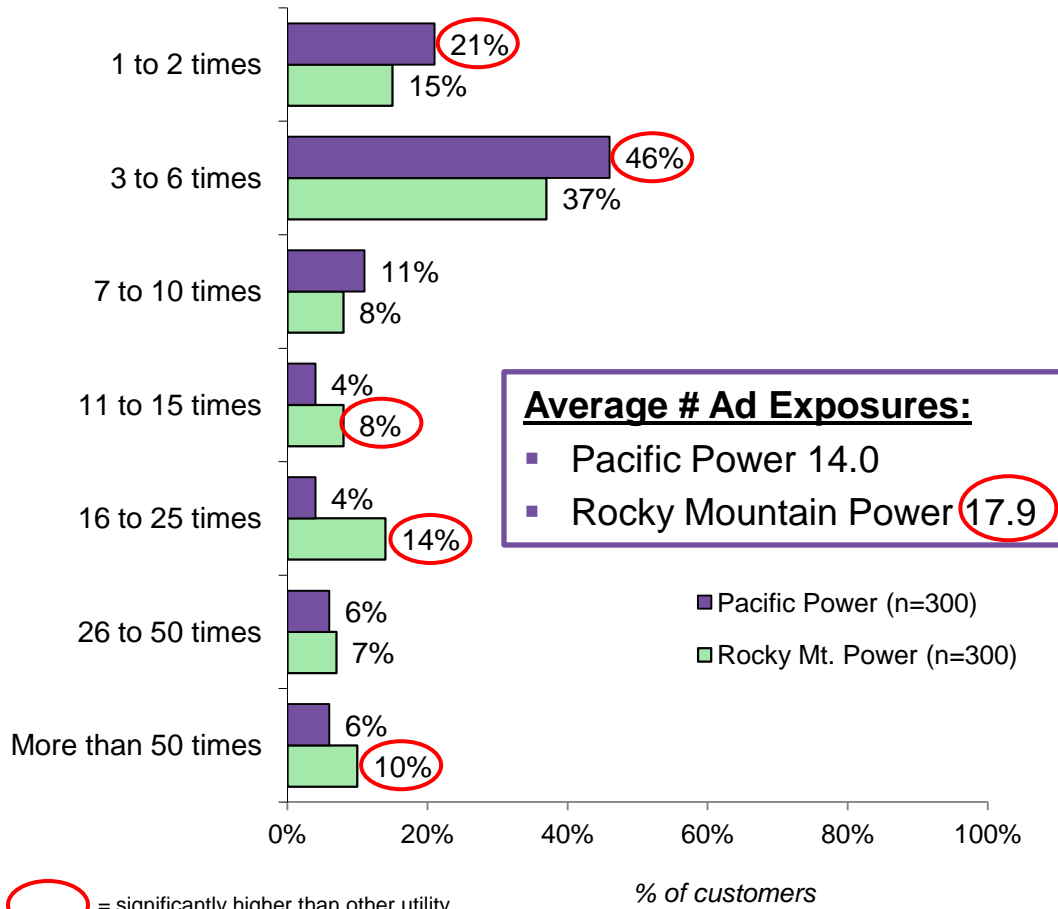


Advertising & Communication Recall

- The following section presents the study's findings on customers' perceptions of the advertising campaign, including message recall, communication channels, message importance and "Let's Turn the Answers On."
- Only those customers who recalled advertisements or communications from Pacific Power or Rocky Mountain Power were asked the following series of questions presented in this section.

Advertising Exposure Recall

2011 Number of Recalled Advertising Exposures



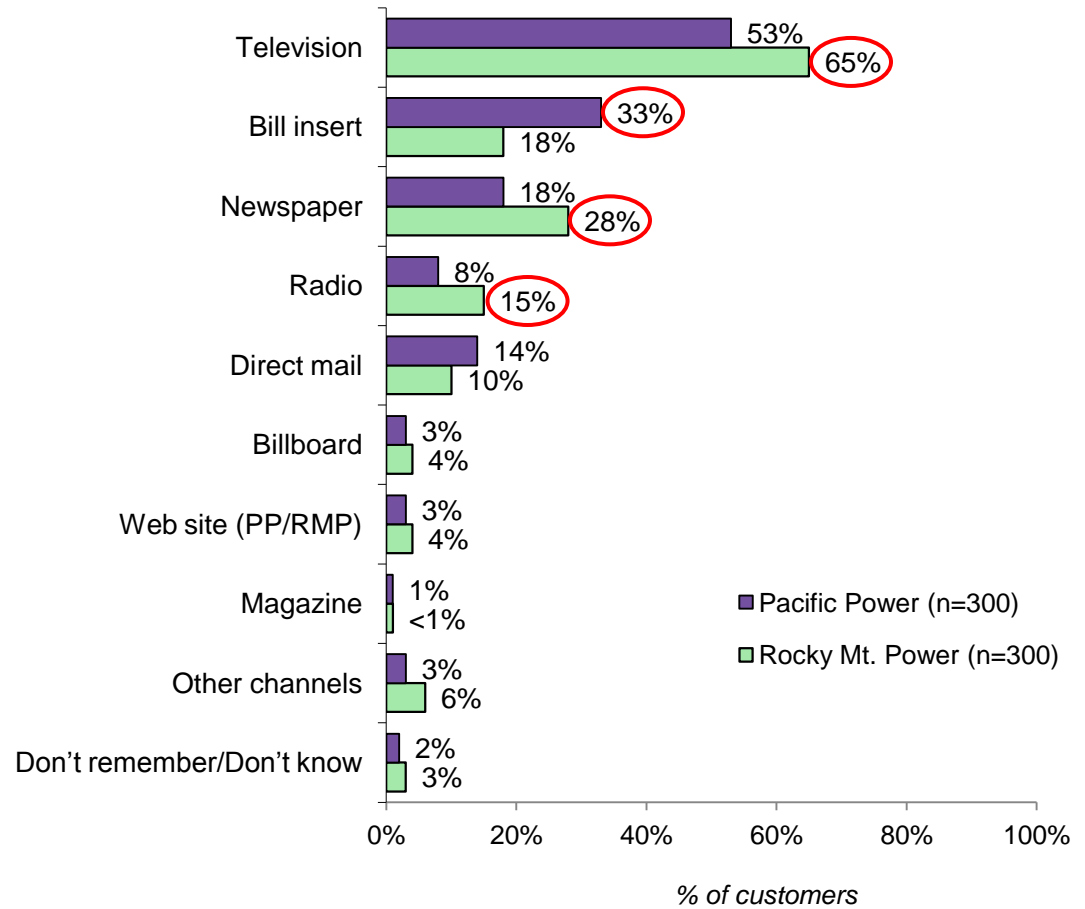
- The average number of advertising exposures recalled is significantly higher among Rocky Mountain Power customers.

Q5a During the past six months, about how many times have you seen advertisements have you seen from UTILITY on television, radio or newspapers?

Advertising & Communication Channels 2011

- *Television* is the most frequently mentioned channel for advertisements and communications.
- Rocky Mountain Power customers are more likely than Pacific Power customers to remember ads through *television, radio* and *newspaper*.
- *Bill inserts* are mentioned significantly more frequently by Pacific Power customers.

2011 Advertising & Communication Channels*



*Advertising & communication channels are listed in decreasing order by total.

○ = significantly higher than other utility

Q5b Where did you see, hear or read these advertisements or communications from UTILITY?

Advertising & Communication Channels 2009-2011

- Television has increased significantly since 2009, as a source of advertising recall for both Pacific Power and Rocky Mountain Power.
 - Television has decreased slightly between 2010 and 2011, though not significantly, for Rocky Mountain Power customers.
- Among Pacific Power customers, mentions of *bill inserts* have increased significantly since 2010 while *newspapers* have decreased significantly.

Advertising & Communication Channels	2009		2010		2011	
	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power
	(n=200)	(n=200)	(n=220)	(n=218)	(n=300)	(n=300)
Television	34%	44%	49%	69%	53%	65%
Bill insert	42%	34%	24%	15%	33%	18%
Newspaper	21%	18%	27%	23%	18%	28%
Radio	6%	8%	5%	16%	8%	15%
Direct mail	19%	18%	11%	10%	14%	10%
Billboard	2%	4%	2%	4%	3%	4%
Website (PP/RMP)	< 1%	6%	5%	5%	3%	4%
Magazine	2%	2%	2%	0%	1%	1%
Other channels	4%	5%	2%	4%	3%	6%
Don't remember/Don't know	4%	2%	8%	5%	2%	3%

RED = significant difference with 2009
BLUE = significant difference with 2010
GREEN = significant difference with 2009 and 2010

Q5b Where did you see, hear or read these advertisements or communications from UTILITY?

Unaided & Aided Message Recall 2011

- Overall, “using energy wisely” and “energy efficiency programs” are the most widely recalled messages.
- Pacific Power customers are significantly more likely to recall messages with content about “renewable or alternative energy” (unaided), “billing or energy assistance” (aided) and “preparing for power outages” (aided).
- Aided, Rocky Mountain Power customers are significantly more likely to recall messages with content about “working to keep your power on,” “programs such as equal pay,” “transmission line projects” and “Being Wattsmart” than Pacific Power customers.

Messages Recalled	Pacific Power (n=300)			Rocky Mt. Power (n=300)		
	Unaided	Aided	Total	Unaided	Aided	Total
Using energy wisely ← Highest aided recall	15%	54%	70%	19%	59%	78%
Energy efficiency programs ← Second highest aided recall	19%	48%	67%	24%	51%	75%
Renewable or alternative energy	22%	43%	64%	13%	38%	50%
Being Wattsmart	3%	28%	31%	3%	62%	65%
Working to keep your power on	5%	37%	42%	4%	46%	50%
Electrical safety	9%	37%	45%	11%	31%	41%
Billing or energy assistance	6%	38%	44%	5%	30%	36%
Programs such as equal pay/customer guarantees	3%	28%	31%	2%	37%	40%
Planning for your future energy needs	3%	34%	37%	1%	32%	33%
Preparing for power outages	4%	35%	39%	2%	27%	30%
Transmission line projects	2%	11%	12%	2%	18%	20%
Environment friendly	5%	n/a	5%	4%	n/a	4%
Other	19%	n/a	16%	15%	n/a	14%
Don't remember/Don't know	37%	17%	43%	32%	7%	34%

Q6 What types of messages or topics do you remember from UTILITY's advertisements or communications?

Q7 Do you remember any of the following messages or topics from the UTILITY advertisements or communications?

○ = significantly higher than other utility

Pacific Power - Unaided & Aided Message Recall 2009-2011

Messages Recalled	Pacific Power					
	Unaided			Aided		
	2009 (n=200)	2010 (n=220)	2011 (n=300)	2009 (n=200)	2010 (n=220)	2011 (n=300)
Using energy wisely	14%	14%	15%	56%	49%	54%
Energy efficiency programs	19%	17%	19%	60%	50%	48%
Renewable or alternative energy	28%	20%	22%	54%	41%	43%
Being Wattsmart	n/a	n/a	3%	n/a	n/a	28%
Working to keep your power on	3%	1%	5%	27%	29%	37%
Electrical safety	10%	12%	9%	42%	38%	37%
Billing or energy assistance	n/a	7%	6%	n/a	35%	38%
Programs such as equal pay/customer guarantees	10%	4%	3%	31%	25%	28%
Planning for your future energy needs	1%	5%	3%	34%	26%	34%
Preparing for power outages	1%	1%	4%	42%	34%	35%
Transmission line projects	1%	4%	2%	12%	10%	11%
Environment friendly	5%	2%	5%	n/a	n/a	n/a
Other messages	5%	13%	19%	n/a	n/a	n/a
Don't remember/Don't know	30%	36%	37%	4%	10%	5%

- Overall, the three communication messages cited most often by Pacific Power customers are:
 - Using energy wisely
 - Energy efficiency programs
 - Renewable or alternative energy
- Unaided, “working to keep your power on” and “preparing for power outages” saw a significant increase from 2010, while programs such as “equal pay” saw a significant decrease in recall from 2009.
- Aided, “energy efficiency programs” and “renewable or alternative energy” saw a significant decrease from 2009, while “working to keep your power on” saw a significant increase.

RED = significant difference with 2009
 BLUE = significant difference with 2010
 GREEN = significant difference with 2009 and 2010

Q6 What types of messages or topics do you remember from UTILITY's advertisements or communications?

Q7 Do you remember any of the following messages or topics from the UTILITY advertisements or communications?

Rocky Mt. Power - Unaided & Aided Message Recall 2009-2011

Messages Recalled	Rocky Mt. Power					
	Unaided			Aided		
	2009 (n=200)	2010 (n=218)	2011 (n=300)	2009 (n=200)	2010 (n=218)	2011 (n=300)
Using energy wisely	18%	21%	19%	50%	57%	59%
Energy efficiency programs	31%	26%	24%	52%	51%	51%
Renewable or alternative energy	16%	7%	13%	39%	44%	38%
Being Wattsmart	n/a	n/a	3%	n/a	n/a	62%
Working to keep your power on	4%	4%	4%	37%	36%	46%
Electrical safety	8%	9%	11%	36%	39%	31%
Billing or energy assistance	n/a	2%	5%	n/a	28%	30%
Programs such as equal pay/customer guarantees	9%	7%	2%	34%	29%	37%
Planning for your future energy needs	5%	3%	1%	36%	32%	32%
Preparing for power outages	2%	2%	2%	31%	26%	27%
Transmission line projects	2%	2%	2%	20%	11%	18%
Environment friendly	<1%	2%	4%	n/a	n/a	n/a
Other messages	3%	12%	15%	n/a	1%	n/a
Don't remember/Don't know	32%	33%	32%	5%	7%	2%

- Overall, the three communication messages cited most often by Rocky Mountain Power customers are:
 - Using energy wisely
 - Energy efficiency programs
 - Being Wattsmart
- Unaided, “renewable or alternative energy” saw a significant increase from 2010, while “planning for your future energy needs” and “programs such as equal pay” saw a significant decrease in recall from 2009.
- Aided, “using energy wisely” and “working to keep your power on” saw significant increases from 2009, while “transmission line projects” saw a significant increase in recall from 2010.

RED = significant difference with 2009

BLUE = significant difference with 2010

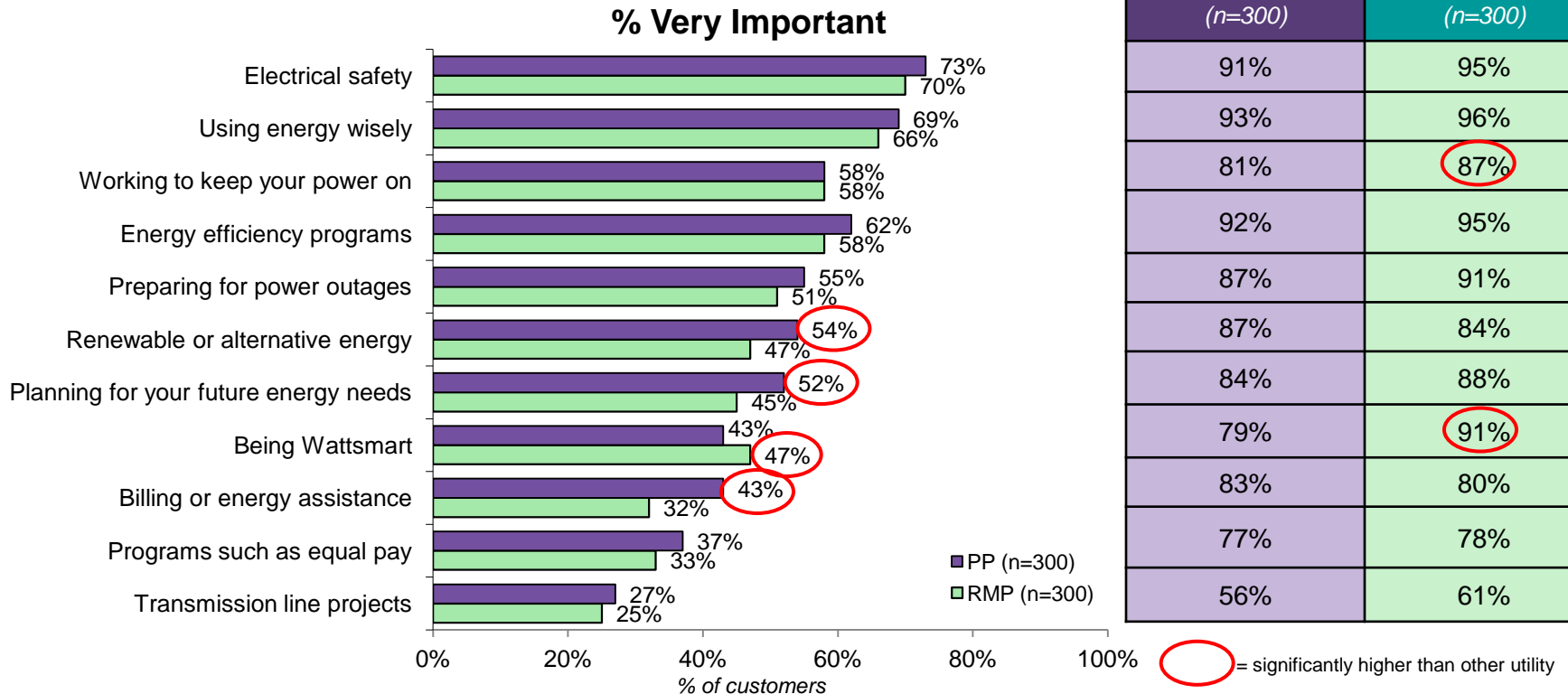
GREEN = significant difference with 2009 and 2010

Q6 What types of messages or topics do you remember from UTILITY's advertisements or communications?

Q7 Do you remember any of the following messages or topics from the UTILITY advertisements or communications?

Importance of Communication Messages 2011

- “Electrical safety,” “using energy wisely,” “working to keep your power on” and “energy efficiency programs” remain the messages most important to customers.
 - Pacific Power customers are significantly more likely to find “renewable or alternative energy,” “planning for your future energy needs” and “billing or energy assistance” to be more important than Rocky Mountain Power customers.
 - Rocky Mountain Power customers are more likely to find “Being Wattsmart” to be more important than Pacific Power customers.



Q8 Do you think the following messages are very important, somewhat important, not very important or not at all important for UTILITY to communicate to customers like yourself?

Importance of Communication Messages 2009-2011

- “Renewable or alternative energy” has seen a significant decrease in importance across both utilities since 2009.
- Pacific Power has seen a decrease in importance ratings for “using energy wisely” and “energy efficiency programs” since 2009.

Advertising & Communication Channels (% “very important”)	2009		2010		2011	
	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power
	(n=200)	(n=200)	(n=220)	(n=218)	(n=300)	(n=300)
Electrical safety	76%	76%	75%	73%	73%	70%
Using energy wisely	76%	70%	69%	67%	69%	66%
Energy efficiency programs	72%	64%	67%	58%	62%	58%
Working to keep your power on	61%	62%	69%	60%	58%	58%
Preparing for power outages	55%	52%	60%	56%	55%	51%
Renewable or alternative energy	64%	60%	60%	53%	54%	47%
Planning for your future energy needs	57%	52%	46%	48%	52%	45%
Billing or energy assistance	n/a	n/a	41%	33%	43%	32%
Programs such as equal pay/customer guarantees	34%	32%	32%	34%	37%	33%
Transmission line projects	24%	24%	27%	23%	27%	25%

RED = significant difference with 2009

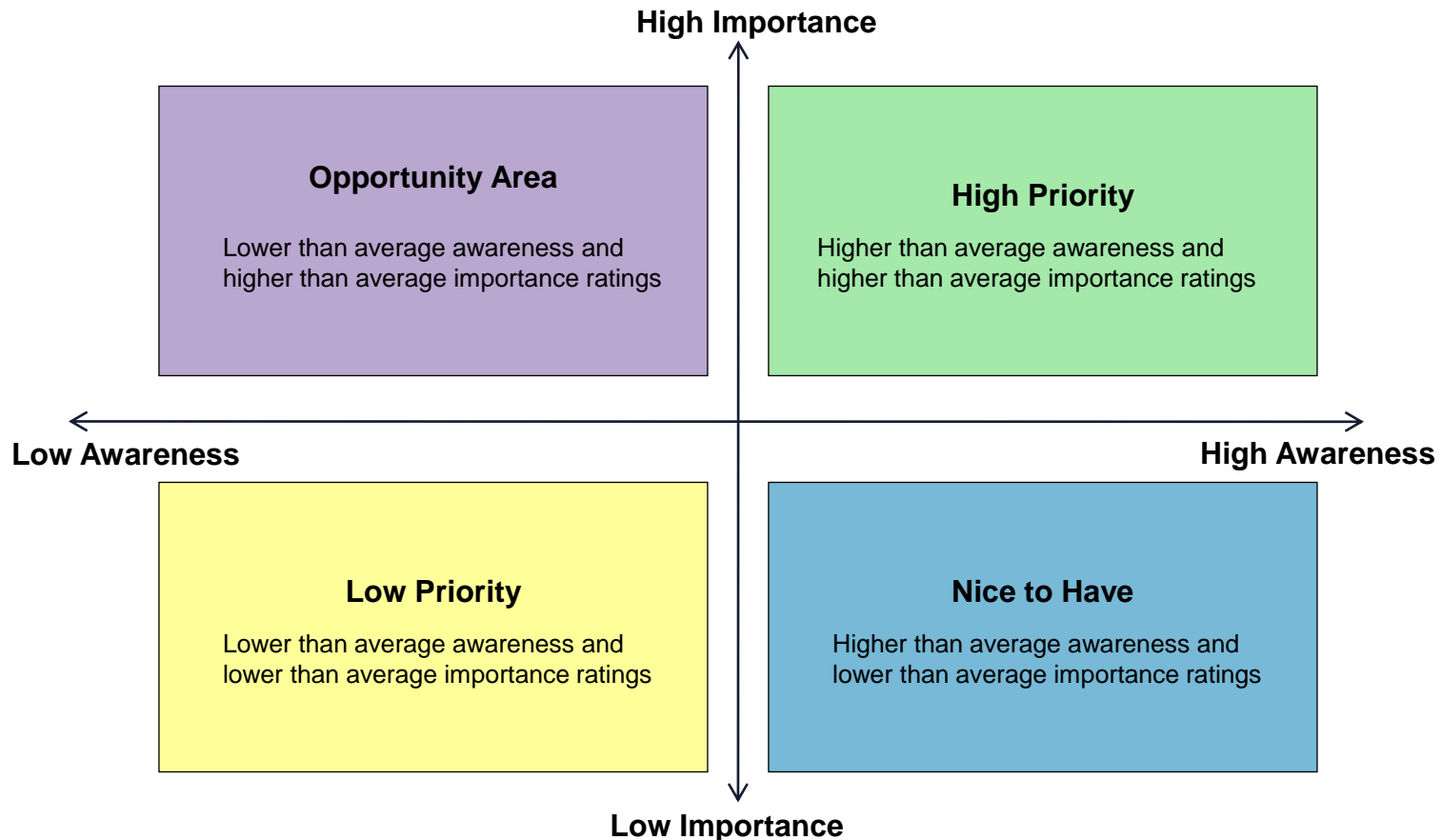
BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010

Q8 Do you think the following messages are very important, somewhat important, not very important or not at all important for UTILITY to communicate to customers like yourself?

Message Importance & Awareness Gap Analysis

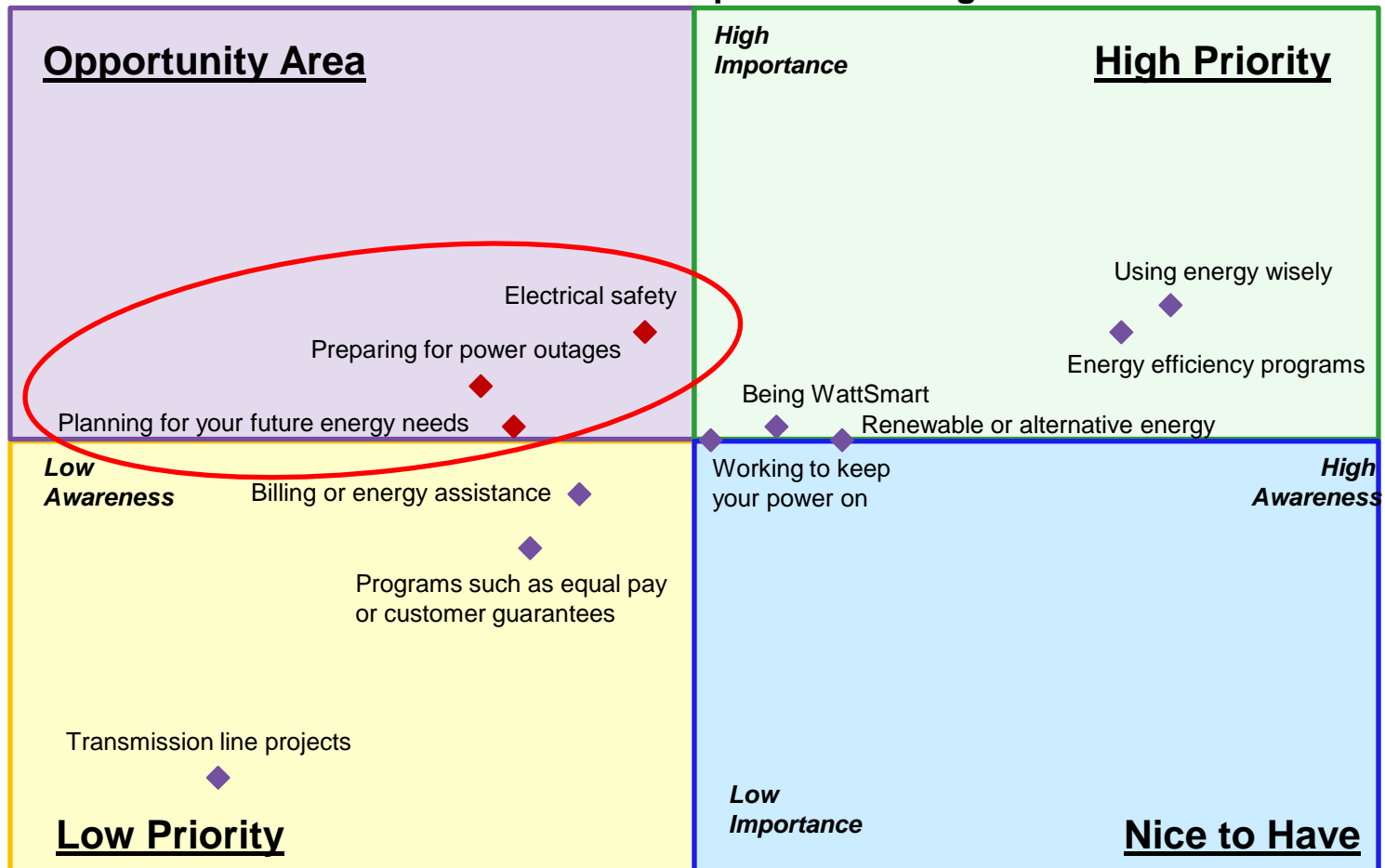
- The following slide presents a quadrant chart outlining the relative importance of each advertising message and the relative awareness of each message.
- Messages considered highly important, but with low awareness, indicate opportunity areas for Pacific Power and Rocky Mountain Power. Increasing awareness of these important messages may help promote more positive impressions of the utility, as well as boost overall satisfaction.



Message Awareness vs. Importance Ratings 2011

- Consistent with 2010, the messages “preparing for power outages” and “planning for your future energy needs” continue to have higher than average importance, but lower than average awareness, indicating an opportunity to focus on raising awareness of these messages.
 - In 2011, the message “electrical safety” moved into the opportunity quadrant.

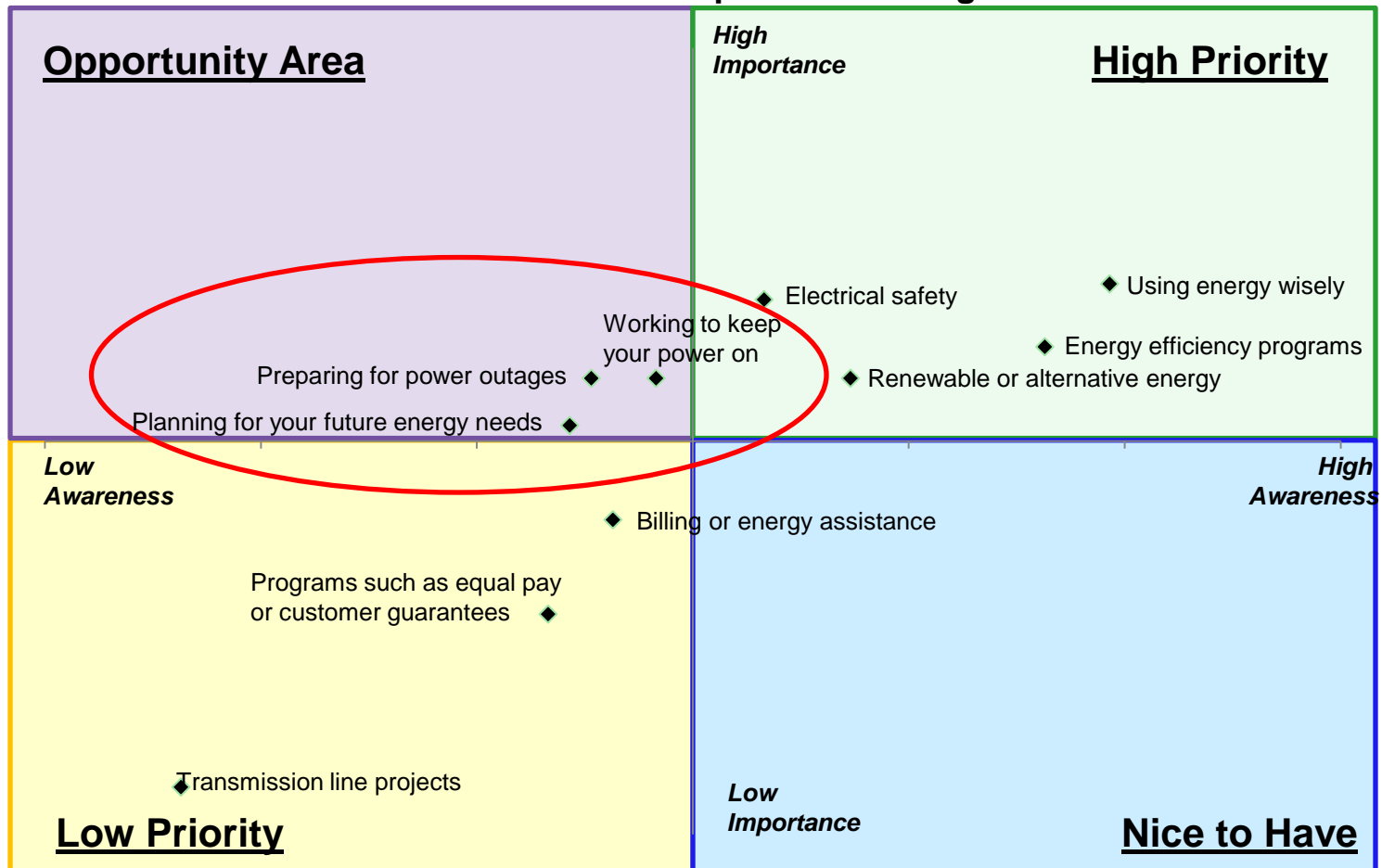
2011 Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2010

- The messages “working to keep your power on,” “preparing for power outages” and “planning for your future energy needs” have higher than average importance, but lower than average awareness, indicating an opportunity to focus on raising awareness of these messages.

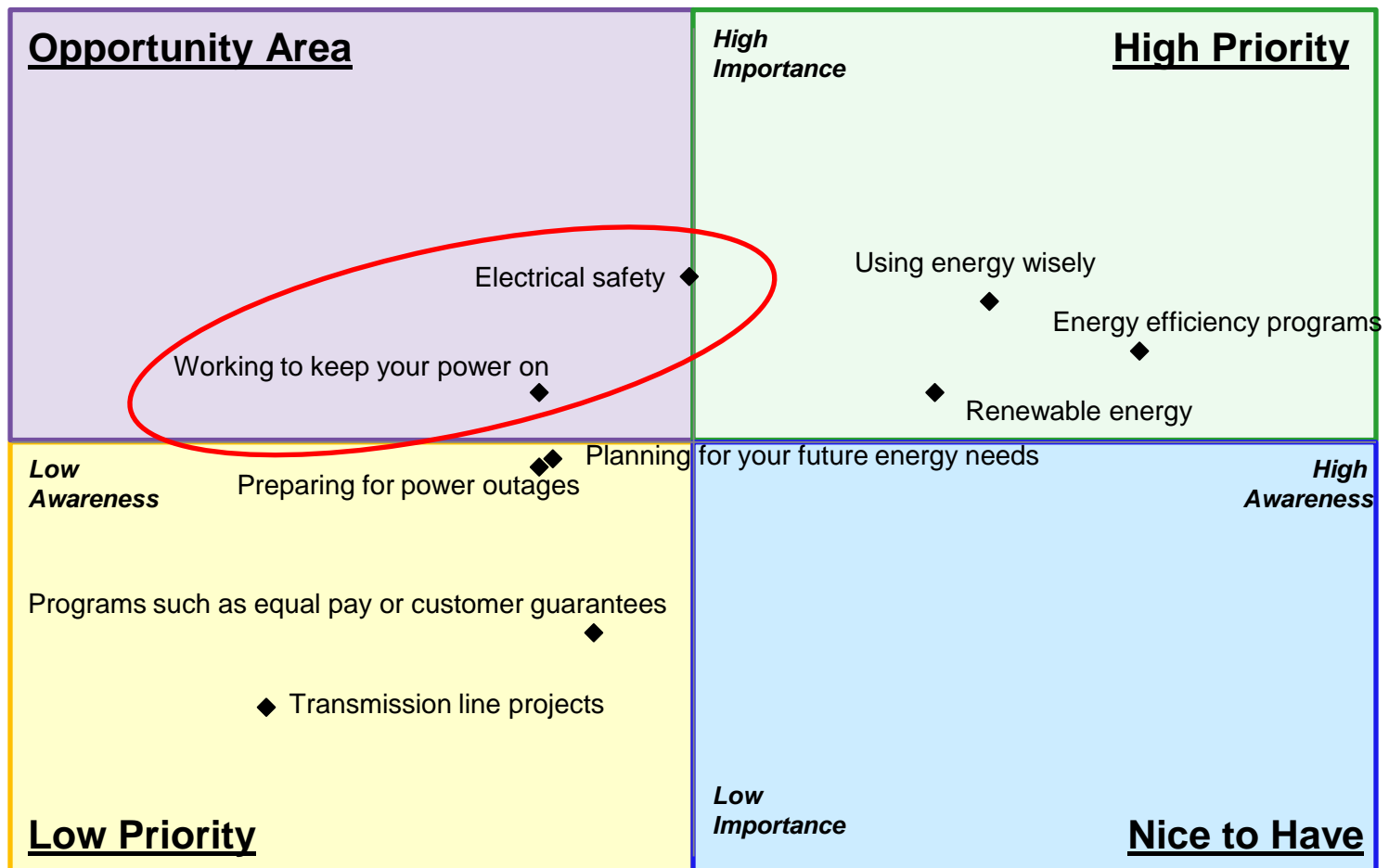
2010 Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2009

- Both opportunity areas in 2009 - “electrical safety” and “working to keep your power on” – experienced an increase in message awareness in 2010.

2009 Awareness vs. Importance Ratings



Additional Suggested Messages 2009-2011

- Besides the 10 messages tested on the previous slides, customers were asked if there are any other messages or topics that their electric utility should be communicating to customers.

Other Important Topics	Pacific Power			Rocky Mt. Power		
	2009 (n=200)	2010 (n=220)	2011 (n=300)	2009 (n=200)	2010 (n=218)	2011 (n=300)
All information provided is sufficient	22%	15%	16%	24%	18%	22%
Alternative Energy/Energy Efficiency	34%	19%	19%	40%	18%	14%
Breakdown of how to practice energy efficiency/info on energy efficient appliances	16%	10%	9%	20%	9%	6%
Investment in alternative (green) energy sources	14%	8%	9%	14%	6%	7%
Energy incentive programs	4%	1%	1%	6%	3%	1%
Billing and Payment	26%	17%	13%	20%	12%	9%
Economically sensitive billing practices/programs	18%	10%	6%	14%	5%	4%
More detailed billing information/customer usage summaries	8%	7%	7%	6%	7%	5%
Corporate Information	19%	7%	15%	19%	8%	16%
Information on company decisions/practices/operations	6%	5%	5%	4%	2%	8%
Information on local projects	4%	1%	0%	4%	1%	0%
List of available services	2%	<1%	2%	4%	1%	1%
Customer service access	3%	2%	3%	2%	2%	4%
What makes them dependable	2%	0%	2%	3%	1%	2%
Power outage information	2%	0%	3%	2%	1%	1%
Energy Safety	4%	4%	5%	8%	5%	2%
Other	3%	3%	13%	3%	1%	11%
Don't remember/Don't know	13%	24%	17%	14%	24%	21%
None/Nothing more	16%	22%	24%	22%	25%	24%

Q9 What other messages or topics do you think UTILITY should be communicating to customers in their ads and communications?

RED = significant difference with 2009

BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010

Perception of Advertisements & Communications

- Perceptions of advertisements have remained relatively unchanged since 2009.
 - Although Pacific Power customers find communications slightly more informative in 2011 than in 2010, agreement is still significantly lower than in 2009.

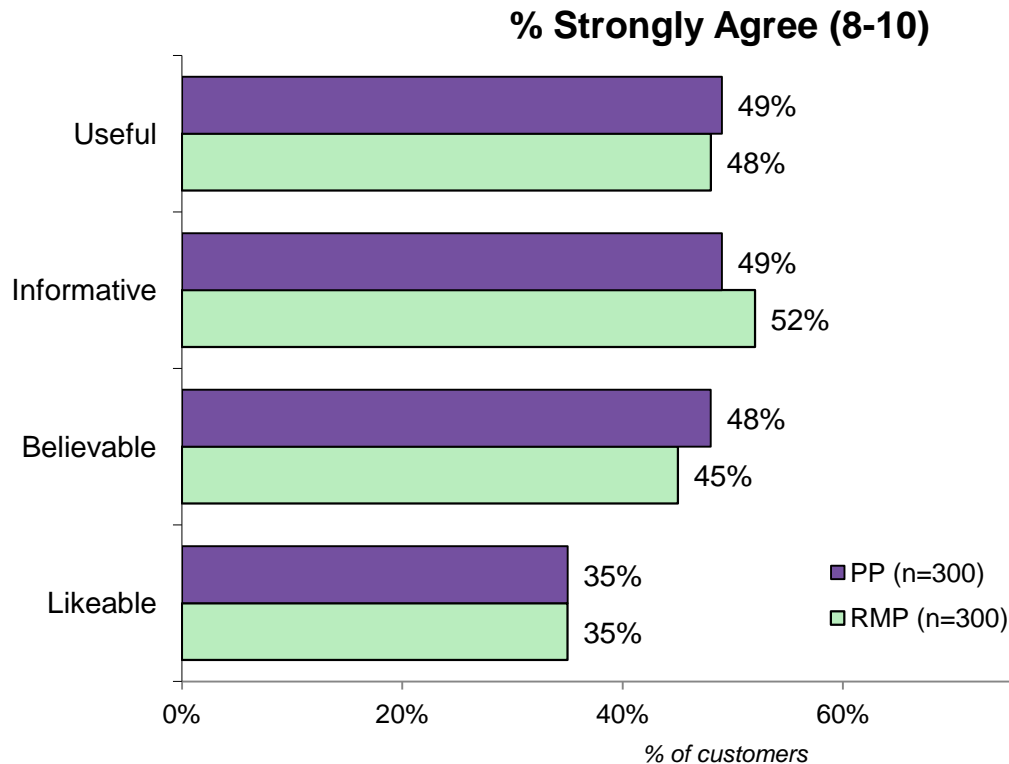
Perception of Advertisements & Communications % Strongly Agree (8-10 ratings)	2009		2010		2011	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=300)	Rocky Mt. Power (n=300)
Useful	n/a	n/a	45%	48%	49%	48%
Informative	58%	45%	46%	47%	49%	52%
Believable	54%	50%	48%	42%	48%	45%
Likeable	38%	34%	43%	37%	35%	35%

RED = significant difference with 2009
BLUE = significant difference with 2010
GREEN = significant difference with 2009 and 2010

Q10 I'm going to read some words that might describe the ads or communications you remember from UTILITY. Please rate each word on a scale of 0-10, where 0 means you completely disagree and 10 means you completely agree that the word describes the ads or communications.

Perception of Advertisements & Communications 2011

- Roughly half perceive advertisements and communications to be *useful, informative and believable*.
 - One third perceive advertisements and communications to be *likeable*.
 - There are no significant differences between utilities.



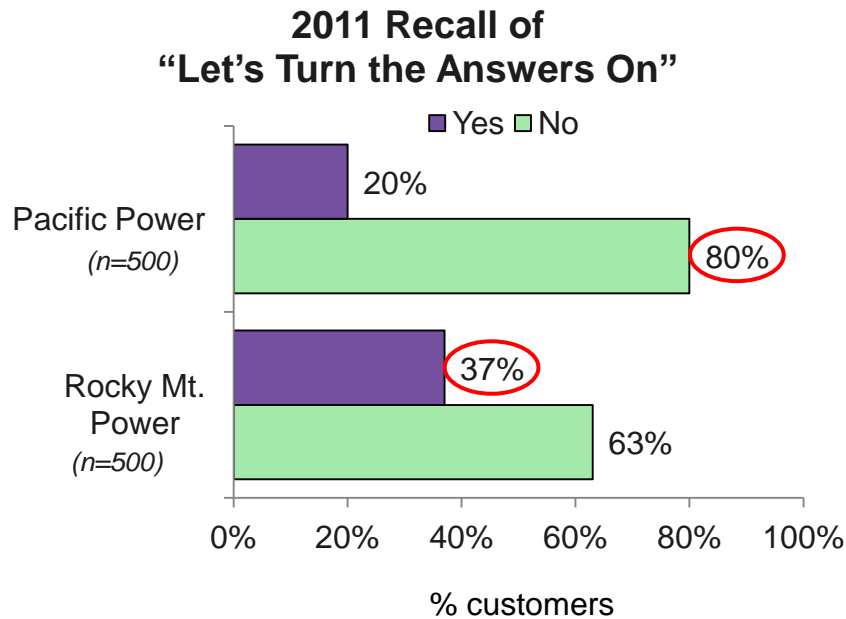
% Strongly Disagree (0-4)	
Pacific Power (n=300)	Rocky Mt. Power (n=300)
10%	7%
9%	7%
14%	13%
15%	13%

15% = significantly higher than other utility

Q10 I'm going to read some words that might describe the ads or communications you remember from UTILITY. Please rate each word on a scale of 0-10, where 0 means you completely disagree and 10 means you completely agree that the word describes the ads or communications.

“Let’s Turn the Answers On” 2009-2011

- Among Pacific Power customers, recall of “Let’s Turn the Answers On” has remained consistent with 2009 and 2010 figures.
- Rocky Mountain Power customers’ recall of “Let’s Turn the Answers On” has increased significantly from 2009.



2009 Pacific Power (n=200)	2010 Pacific Power (n=220)	2009 Rocky Mt. Power (n=200)	2010 Rocky Mt. Power (n=218)
16% yes	22% yes	28% yes	42% yes
84% no	78% no	72% no	58% no

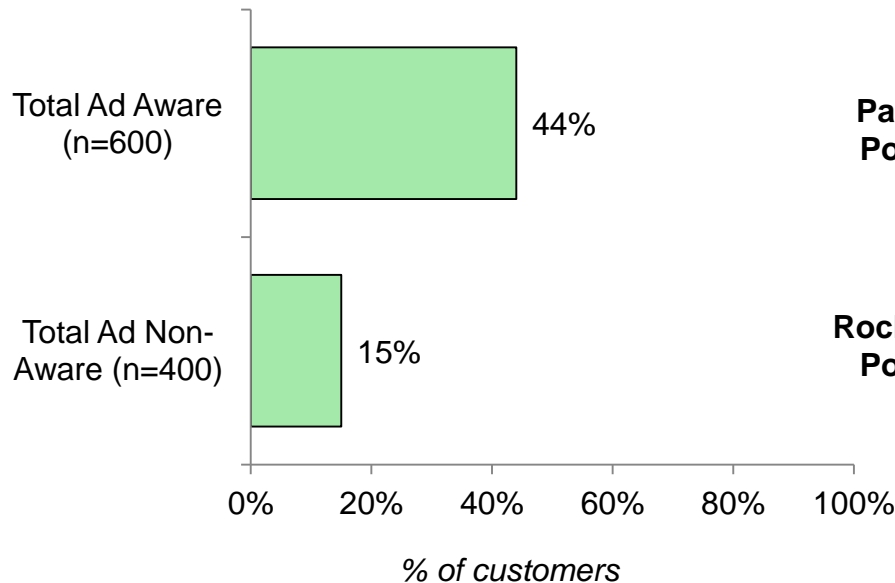
= significantly higher than other utility

Q15A Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

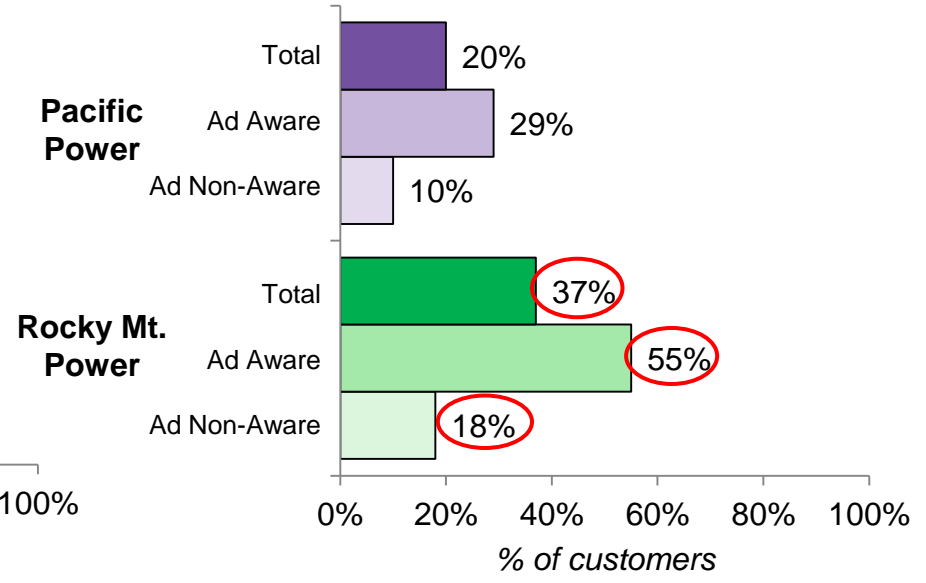
“Let’s Turn the Answers On” 2011

- Nearly half (44%) of all Ad Aware customers recall the phrase “Let’s Turn the Answers On.”
- Customers who took action after seeing the ads are more likely to recall the phrase “Let’s Turn the Answers On” (53% vs. 40%).

**Recall of
“Let’s Turn the Answers On”**



**Recall of
“Let’s Turn the Answers On”**

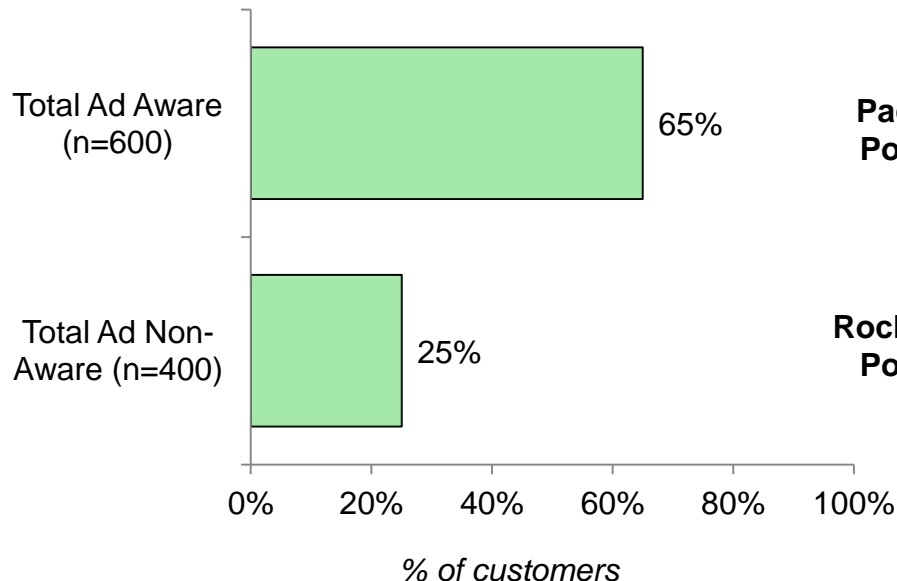


 = significantly higher than other utility

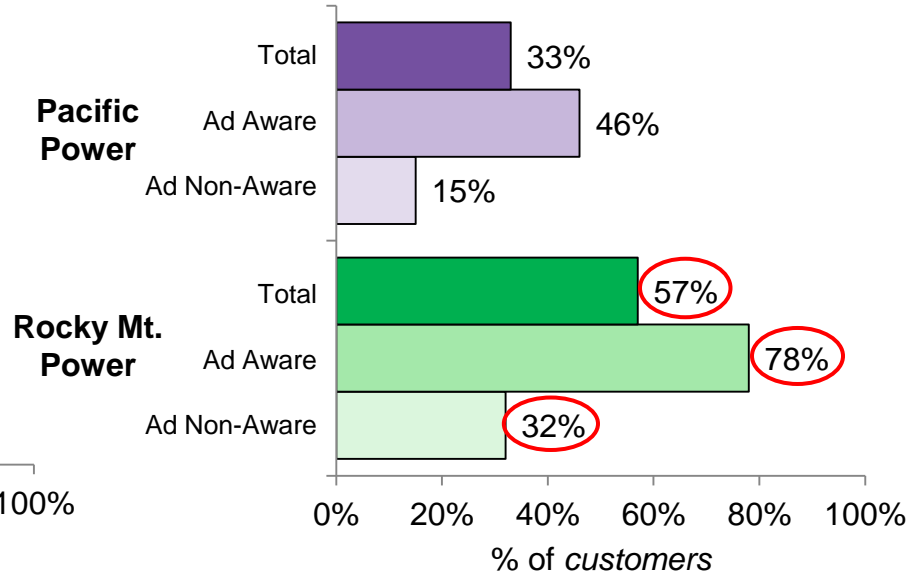
“Being Wattsmart” 2011

- Nearly two thirds (65%) of all Ad Aware customers recall the phrase “Being Wattsmart.”
- The following audiences are more likely to recall the phrase “Being Wattsmart:”
 - Rocky Mountain Power customers (57% vs. 33% Pacific Power);
 - Customers who have a moderately or more favorable image of their utility (71% vs. 42% less favorable).

**Recall of
“Being Wattsmart”**



**Recall of
“Being Wattsmart”**

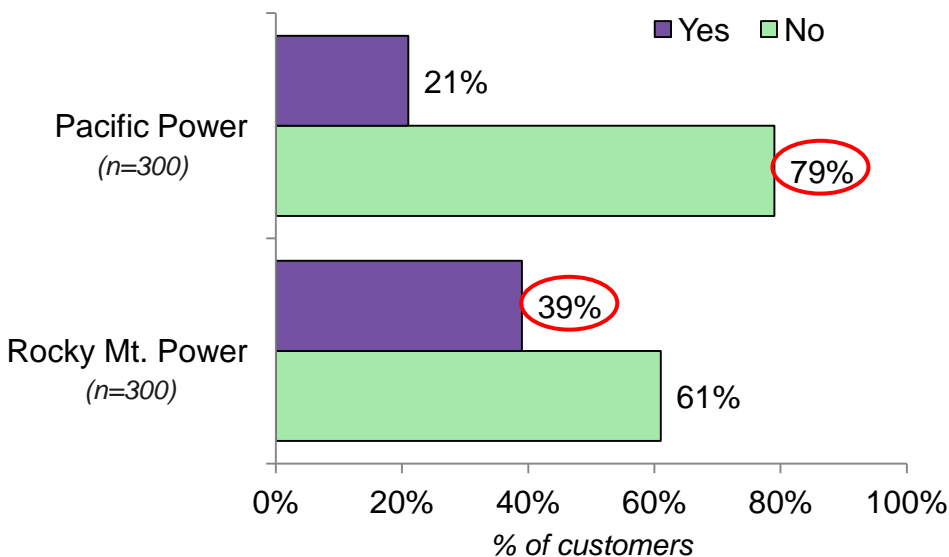


 = significantly higher than other utility

Persuasiveness of Advertising in Call to Action 2009-2011

- For Pacific Power, the percentage of customers who are persuaded to take action based on the advertisements and the actions taken has remained consistent with 2009 and 2010 figures.
- Rocky Mountain Power saw a significant increase in those customers that took action (39%) when compared to 2009 (30%) and 2010 (30%) figures.

2011 Took Action Based on Advertising



2009 Pacific Power (n=200)	2010 Pacific Power (n=220)	2009 Rocky Mt. Power (n=200)	2010 Rocky Mt. Power (n=218)
24% yes	22% yes	30% yes	30% yes
76% no	78% no	70% no	70% no

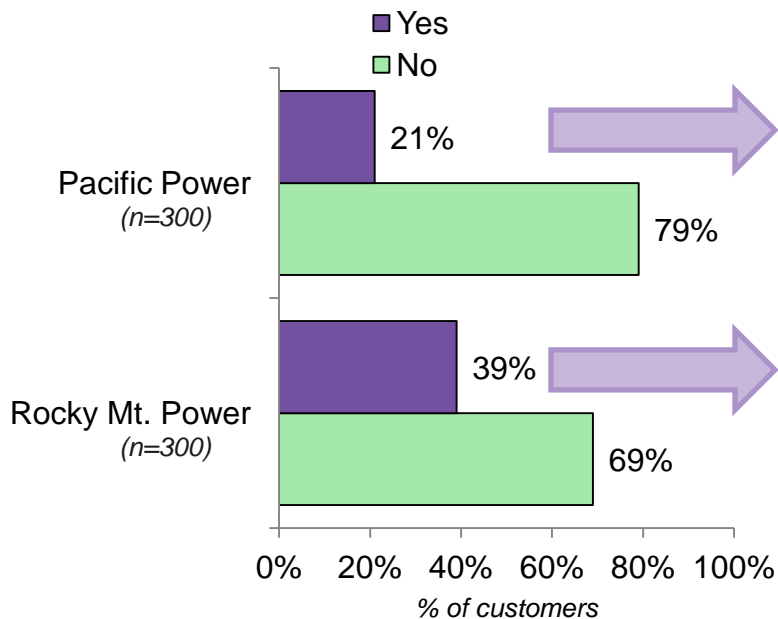
 = significantly higher than other utility

Q11 Did any of the UTILITY ads or communications persuade you to take any action?

Actions Taken Based on Advertisements 2011

- Overall, one third (31%) of Ad Aware customers report taking some action based on the advertisements or communications.
- Of customers persuaded to take action, “switching to energy efficient appliances/lights,” “more aware of power usage (general)” and “enlisting in utility incentive programs” are the top actions taken for both Rocky Mountain and Pacific Power customers.


Took Action Based on Advertisement



Actions taken from seeing the ads or communications	Pacific Power (n=64)	Rocky Mt. Power (n=116)
Purchased/switched to energy efficient appliances/lights	26%	39%
More aware of power usage (general)	21%	25%
Enlisting in utility incentive/rebate programs	19%	20%
Seeking the advice of the utility company	16%	10%
Shutting off lights/appliances when not in use	15%	18%
Becoming more cautious of energy safety	5%	4%
Wattsmart	4%	6%
Invested in the Blue Sky program	4%	4%
Invested in wind power	4%	<1%
Other	24%	13%

Q11 Did any of the UTILITY ads or communications persuade you to take any action?

Q12 What action did you take from seeing the UTILITY ads or communications?



Impact of Advertisements and Communications on Customer Satisfaction & Company Image

Advertisements' Impact on Company Satisfaction – Ad Aware

- Two thirds (66%) of Pacific Power and three fourths (76%) of Rocky Mountain Power Ad Aware customers are “very satisfied” with their utility company.
- Pacific Power saw a significant decrease in “very satisfied” ratings from 2009 and 2010.

Ad Aware: <i>Advertisements' Impact on Company Satisfaction</i>	2009		2010		2011	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=200)	Rocky Mt. Power (n=218)	Pacific Power (n=300)	Rocky Mt. Power (n=300)
Very satisfied (8-10 ratings)	81%	78%	75%	72%	66%	76%
Moderately satisfied (5-7 ratings)	16%	20%	19%	22%	28%	21%
Not satisfied (0-4 ratings)	2%	2%	4%	6%	5%	3%

RED = significant difference with 2009
 BLUE = significant difference with 2010
 GREEN = significant difference with 2009 and 2010

Q16 Now I'm going to ask some questions about your satisfaction with UTILITY.
 First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

Advertisements' Impact on Company Satisfaction – Ad Non-Aware

- Two thirds (68%) of Pacific Power and three fourths (76%) of Rocky Mountain Power Ad Non-Aware customers are “very satisfied” with their utility company.
- Rocky Mountain Power saw a significant increase in “very satisfied” ratings this year when compared to 2010.

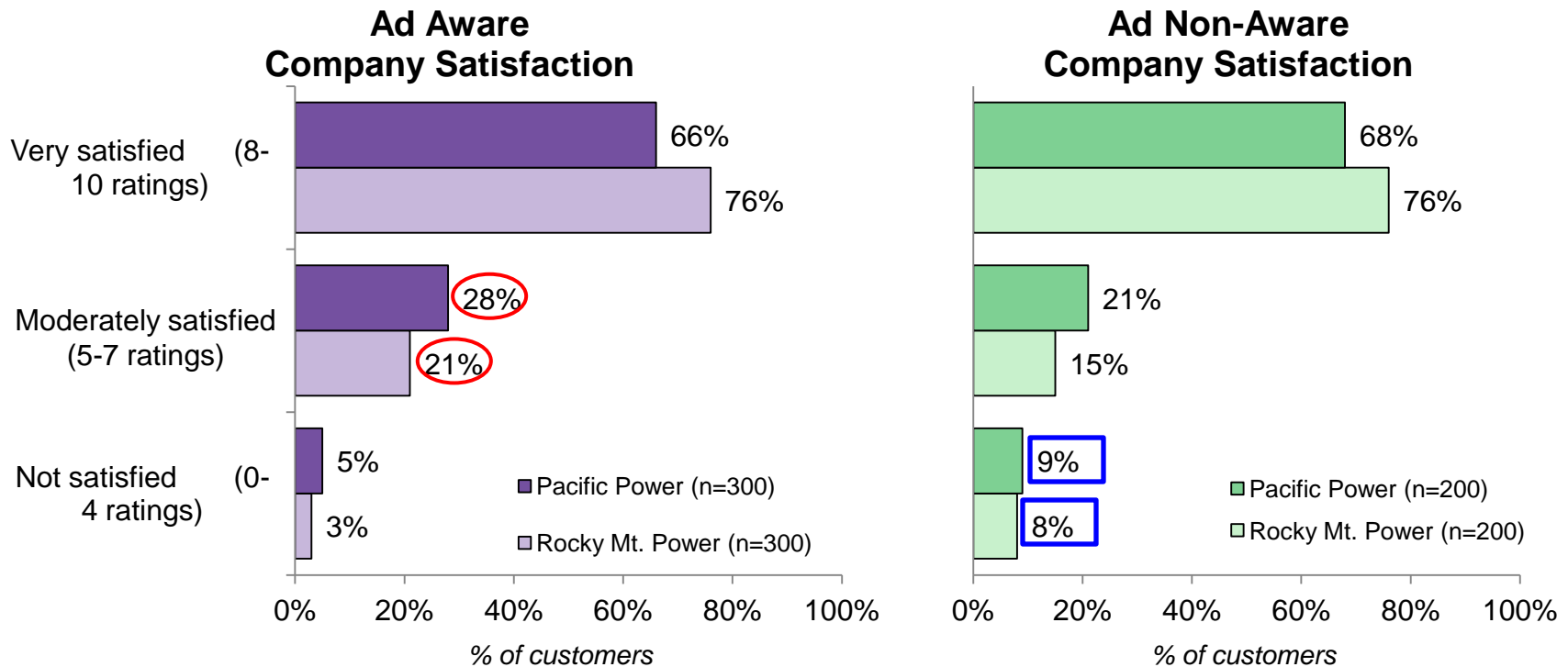
Ad Non-Aware: <i>Advertisements' Impact on Company Satisfaction</i>	2009		2010		2011	
	Pacific Power (n=150)	Rocky Mt. Power (n=150)	Pacific Power (n=150)	Rocky Mt. Power (n=150)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Very satisfied (8-10 ratings)	65%	69%	63%	64%	68%	76%
Moderately satisfied (5-7 ratings)	27%	26%	27%	28%	21%	15%
Not satisfied (0-4 ratings)	6%	4%	11%	6%	9%	8%

RED = significant difference with 2009
BLUE = significant difference with 2010
GREEN = significant difference with 2009 and 2010

Q16 Now I'm going to ask some questions about your satisfaction with UTILITY.
 First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

Advertisements' Impact on Company Satisfaction – 2011

- Overall, Rocky Mountain Power customers were more likely to be “very satisfied” with their utility than Pacific Power customers.
 - Pacific Power Ad Aware customers are significantly less likely to be “very satisfied” in 2011 compared to previous years (2009 81% - 2010 75% and 2011 66%).
 - Rocky Mountain Power Ad Non-Aware customers are significantly more likely to be “very satisfied” in 2011 than in previous years (2009 69% - 2010 64% and 2011 76%).



Q16 Now I'm going to ask some questions about your satisfaction with UTILITY. First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

○ = significantly higher than Ad Non-Aware customers
 □ = significantly higher than Ad Aware customers

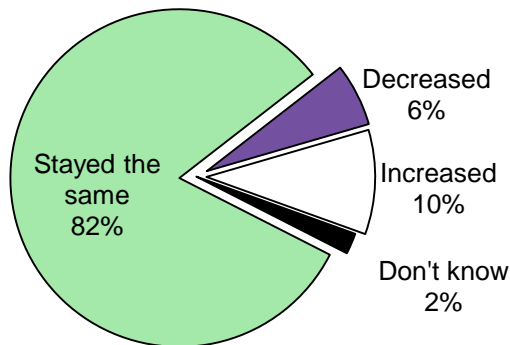
Satisfaction Comparison With Previous Years

Ad Aware

- The majority of Ad Aware customers continue to state that their satisfaction with their utility company has remained unchanged since the previous year.

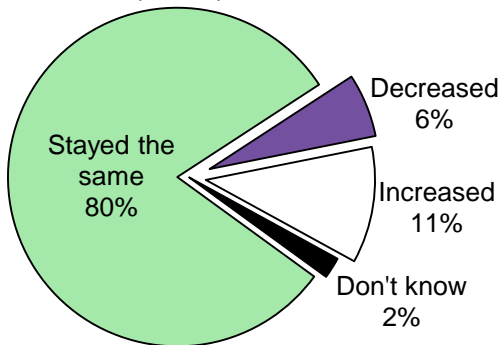
2009 Ad Aware

(n=400)



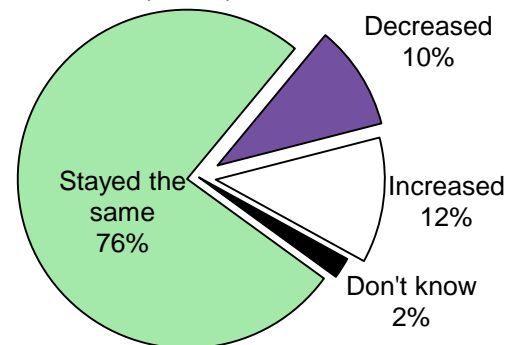
2010 Ad Aware

(n=438)



2011 Ad Aware

(n=600)



Why has your satisfaction increased?	Ad Aware		
	2009	2010	2011
	(n=40)	(n=50)	(n=70)
Good reliable electrical service	25%	50%	43%
Efforts toward energy conservation	18%	21%	11%
Billing services/assistance	12%	17%	19%
Increased familiarity	9%	12%	1%
Quality of customer service	30%	9%	28%
Decreased rates/usage	16%	6%	4%
Other	15%	4%	7%

Why has your satisfaction decreased?	Ad Aware		
	2009	2010	2011
	(n=23) *	(n=28) *	(n=62)
Increased cost/rates	65%	48%	65%
Poor service	16%	27%	17%
Many service interruptions	12%	22%	9%
Efforts toward energy conservation	10%	11%	5%
Billing services/assistance	18%	7%	8%
Quality of customer service	14%	4%	16%
Other	9%	7%	6%

*CAUTION: small sample sizes.

Q17/Q18 Compared to a year ago, has your satisfaction with UTILITY increased, stayed the same or decreased? Why?

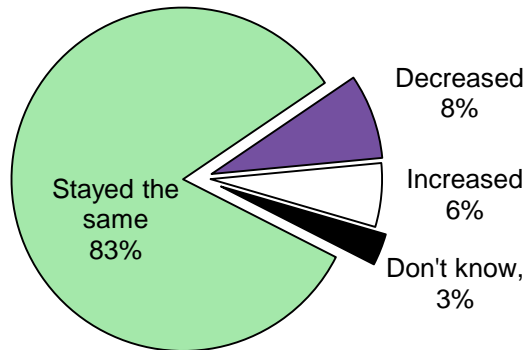
Satisfaction Comparison With Previous Years

Ad Non-Aware

- Ad Non-Aware customers' satisfaction with their utility company remains consistent with the 2009 and 2010 findings.

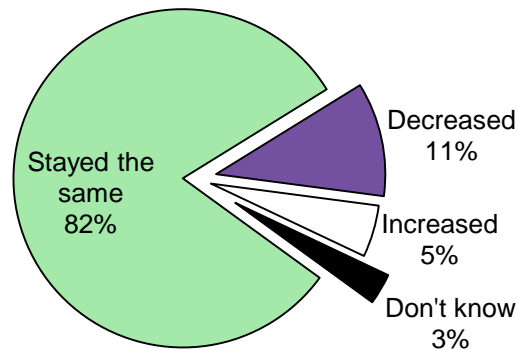
2009 Ad Non-Aware

(n=300)



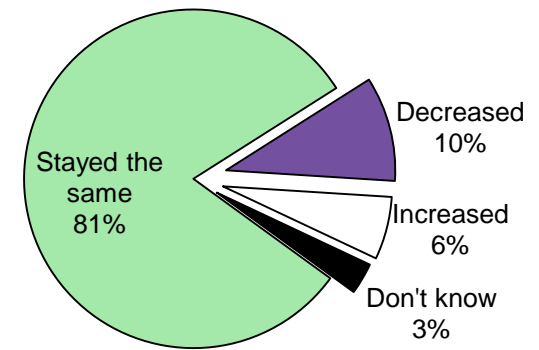
2010 Ad Non-Aware

(n=300)



2011 Ad Non-Aware

(n=400)



Why has your satisfaction increased?	Ad Non-Aware		
	2009	2010	2011
	(n=40)	(n=50)	(n=25) *
Good reliable electrical service	52%	21%	34%
Efforts toward energy conservation	19%	21%	0%
Billing services/assistance	12%	21%	40%
Increased familiarity	9%	15%	1%
Quality of customer service	0%	8%	34%
Decreased rates/usage	15%	0%	0%
Other	0%	16%	0%

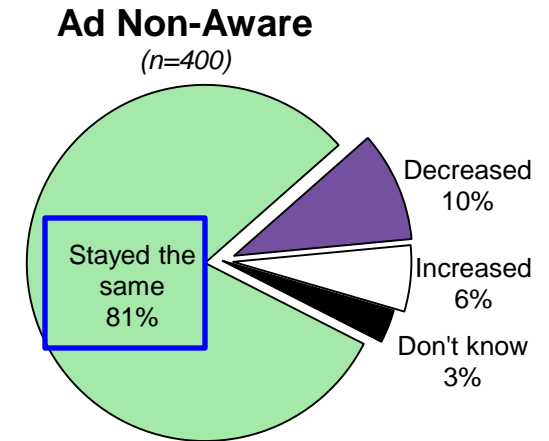
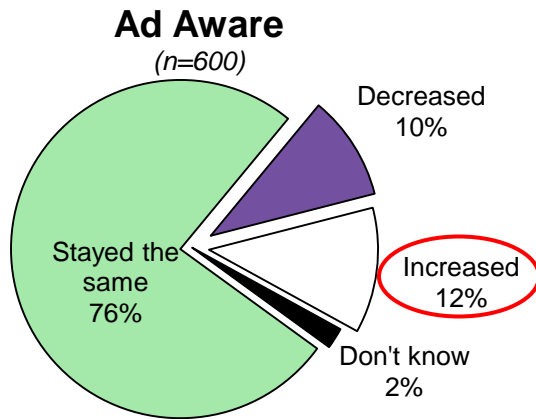
Why has your satisfaction decreased?	Ad Non-Aware		
	2009	2010	2011
	(n=40)	(n=50)	(n=41)
Increased cost/rates	91%	54%	83%
Poor service	21%	26%	24%
Many service interruptions	8%	12%	10%
Efforts toward energy conservation	9%	11%	0%
Billing services/assistance	3%	8%	15%
Quality of customer service	8%	4%	8%
Other	3%	28%	1%

*CAUTION: small sample sizes.

Q17/Q18. Compared to a year ago, has your satisfaction with UTILITY increased, stayed the same or decreased? Why?

Satisfaction Comparison Between Ad Aware and Ad Non-Aware 2011

- Although company satisfaction has remained unchanged for most customers, Ad Aware customers are significantly more likely than Ad Non-Aware customers to report that their satisfaction with the company has increased over the past year; a similar pattern from previous years.





Why has your satisfaction increased?	Ad Aware (n=70)	Ad Non-Aware (n=25)*
Good reliable electrical service	43%	34%
Efforts toward energy conservation	11%	0%
Billing services/assistance	19%	40%
Increased familiarity	1%	1%
Quality of customer service	28%	34%
Decreased rates/usage	4%	0%
Other	7%	0%

Why has your satisfaction decreased?	Ad Aware (n=62)	Ad Non-Aware (n=41)
Increased cost/rates	65%	83%
Poor service	17%	24%
Many service interruptions	9%	10%
Efforts toward energy conservation	5%	0%
Billing services/assistance	8%	15%
Quality of customer service	16%	8%
Other	6%	1%

*CAUTION: small sample sizes.

Q17/Q18 Compared to a year ago, has your satisfaction with UTILITY increased, stayed the same or decreased? Why?

 = significantly higher than Ad Non-Aware customers
 = significantly higher than Ad Aware customers



Company Image Evaluation

- Overall, customers' perceptions of their utility company have remained consistent.
- Customers continue to have the most positive perceptions of their utility when it comes to attributes they are most likely to have **personally experienced**, including:
 - Provides reliable and dependable power
 - Is committed to keeping customers safe around electricity
 - Delivers excellent customer service
- Similarly, customers are least likely to agree with, and most likely to give “don't know” responses to the statements to which they are **unlikely to have direct experience**. These statements include:
 - Supports my community by being involved in charitable and local events
 - Provides electricity at a reasonable price
 - Has programs to help customers save money
 - Has programs that help protect the environment
- **Ad Aware customers** are more likely to be “moderately satisfied” than Ad Non-Aware customers.
 - Additionally, Ad Aware customers are significantly more likely than Ad Non-Aware to report that their satisfaction with the company has increased over the past year.
- The following slides present the percentage of customers who “strongly agree” with a series of statements about their electric utility by giving 8-10 ratings on a 0-10 scale.

Company Image Evaluation 2009-2011

- In 2011, Ad Non-Aware customers are significantly more likely than in 2010 to “strongly agree” that their utility “provides reliable and dependable power” (80% vs. 72%), “delivers excellent customer service” (66% vs. 58%) and “has programs to help customers save money” (44% vs. 35%).
- Ad Aware customers are significantly less likely to “strongly agree” that their utility “provides electricity at a reasonable cost” than they were in 2010.

Company Image Attributes (% “strongly agree” 8-10 ratings)	2009		2010		2011	
	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware
	(n=400)	(n=300)	(n=438)	(n=300)	(n=600)	(n=400)
Provides reliable and dependable power	85%	80%	81%	72%	77%	80%
Is committed to keeping customers safe around electricity	72%	67%	74%	66%	76%	69%
Delivers excellent customer service	64%	62%	65%	58%	66%	66%
Provides me with information and resources to help me use energy wisely	55%	55%	57%	52%	56%	54%
Has plans to meet future energy needs	48%	38%	51%	42%	47%	38%
Provides electricity at a reasonable cost	46%	44%	48%	40%	41%	41%
Has programs to help customers save money	46%	41%	47%	35%	49%	44%
Has programs that help protect the environment	42%	38%	41%	34%	42%	34%
Supports my community by being involved in charitable and local events	24%	19%	27%	19%	25%	21%

RED = significant difference with 2009

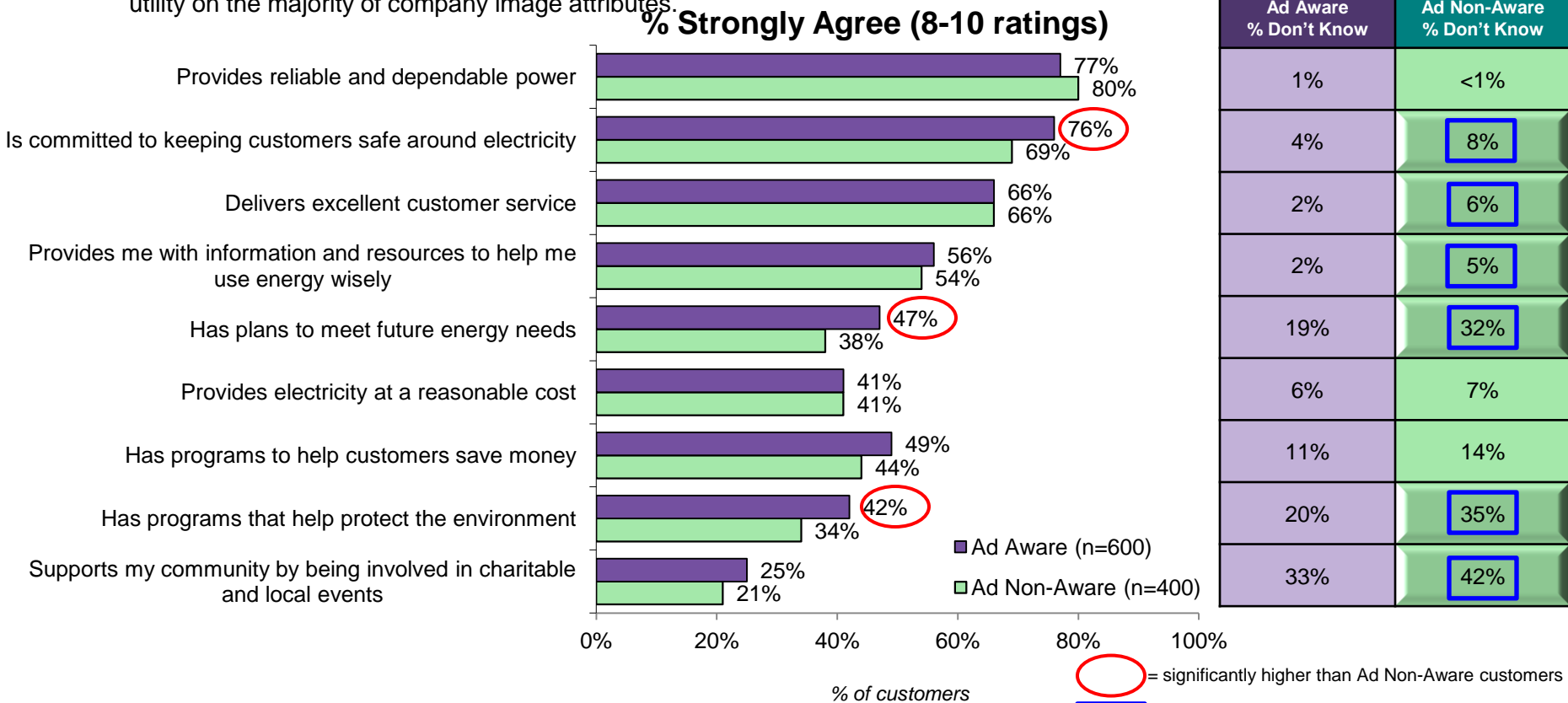
BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010

Q19 Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

Company Image Evaluation 2011

- Ad Aware customers are significantly more likely than Ad Non-Aware to agree that their utility “is committed to keeping customers safe around electricity,” “has plans to meet future energy needs,” and “has programs that help protect the environment.”
- Ad Non-Aware customers are significantly more likely than Ad Aware customers to say they “don’t know” how to evaluate their utility on the majority of company image attributes.



Q19 Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

Company Image Evaluation 2011

(by Utility & Ad Awareness)

- Pacific Power Ad Aware customers are more likely to “strongly agree” that their utility “is committed to keeping customers safe around electricity,” “has plans to meet future energy needs,” “has programs to help protect the environment” and “supports my community by being involved in charitable and local events” than Ad Non-Aware customers.
- Rocky Mountain Power Ad Non-Aware customers are more likely to “strongly agree” that their utility “provides reliable and dependable power.”

Company Image Attributes (% “strongly agree” 8-10 ratings)	Ad Aware		Ad Non-Aware	
	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Provides reliable and dependable power	80%	74%	75%	83%
Is committed to keeping customers safe around electricity	74%	77%	63%	73%
Delivers excellent customer service	63%	69%	65%	67%
Provides me with information and resources to help me use energy wisely	54%	57%	52%	55%
Has plans to meet future energy needs	47%	47%	35%	41%
Provides electricity at a reasonable cost	35%	46%	37%	43%
Has programs to help customers save money	46%	51%	40%	46%
Has programs that help protect the environment	44%	41%	32%	35%
Supports my community by being involved in charitable and local events	30%	21%	17%	24%

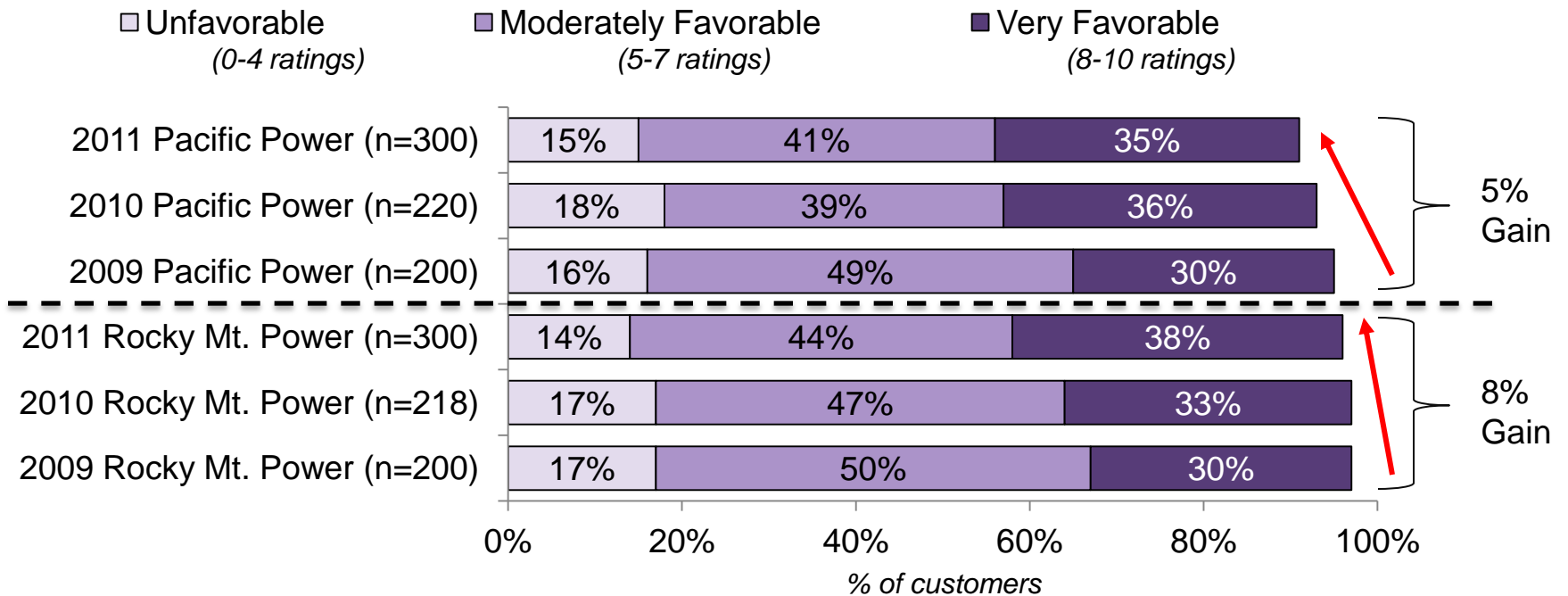
Q19 Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

○ = significantly higher than Ad Non-Aware customers
 □ = significantly higher than Ad Aware customers

Advertisements' Impact on Company Image 2009-2011

- One third (36%) of Ad Aware customers say that the ads have “very favorably” affected their opinion of their electric utility, while less than one fifth (14%) rate the impact as “unfavorable.”

Advertisements' Impact on Favorability Ratings



Q13 Using a 0-10 scale, where 0 means much less favorable, and 10 is much more favorable, how have the advertisements or communications you have seen, heard or read from UTILITY affected your opinion of the company? You can use any number from 0-10.

Rationales for Company Favorability Ratings 2011

Very Favorable (8-10 rating) <i>(n=218)</i>	Moderately Favorable (5-7 rating) <i>(n=254)</i>	Least Favorable (0-4 rating) <i>(n=86)</i>
32% Utility has positive practices/operation <i>(47% - 2010, 49% - 2009)</i>	35% Rarely see advertisement/do not affect me/not useful/not necessary <i>(34% - 2010, 34% - 2009)</i>	40% Rarely see advertisement/do not affect me/not useful/not necessary <i>(39% - 2010, 70% - 2009)</i>
31% Advertisements serve as education to consumers <i>(19% - 2010, 29% - 2009)</i>	20% Neutral feeling towards them	18% Limited choice in utility provider/monopoly <i>(20% - 2010, 20% - 2009)</i>
21% Utility provides a necessary service <i>(6% - 2010)</i>	11% Advertisements serve as education to consumers <i>(5% - 2010)</i>	15% Utility has poor practices/inefficient <i>(11% - 2010)</i>
16% Information is useful to energy habits/usage <i>(10% - 2010, 25% - 2009)</i>	9% Utility has positive business practices/operation <i>(21% - 2010, 20% - 2009)</i>	13% Not convinced of the information given
8% Information on energy savings/bill minimizing practices <i>(9% - 2010, 15% - 2009)</i>	7% Limited choice in utility provider/monopoly <i>(14% - 2010, 11% - 2009)</i>	8% Misleading/fluctuating costs <i>(13% - 2010, 14% - 2009)</i>
5% Rarely see advertisement/do not affect me/not useful/not necessary	6% Utility has poor practices/inefficient <i>(5% - 2010)</i>	6% Information on energy savings/bill minimizing practices
5% Neutral feeling towards them	4% Information is useful to energy habits/usage <i>(5% - 2010)</i>	6% Utility has positive practices/operation

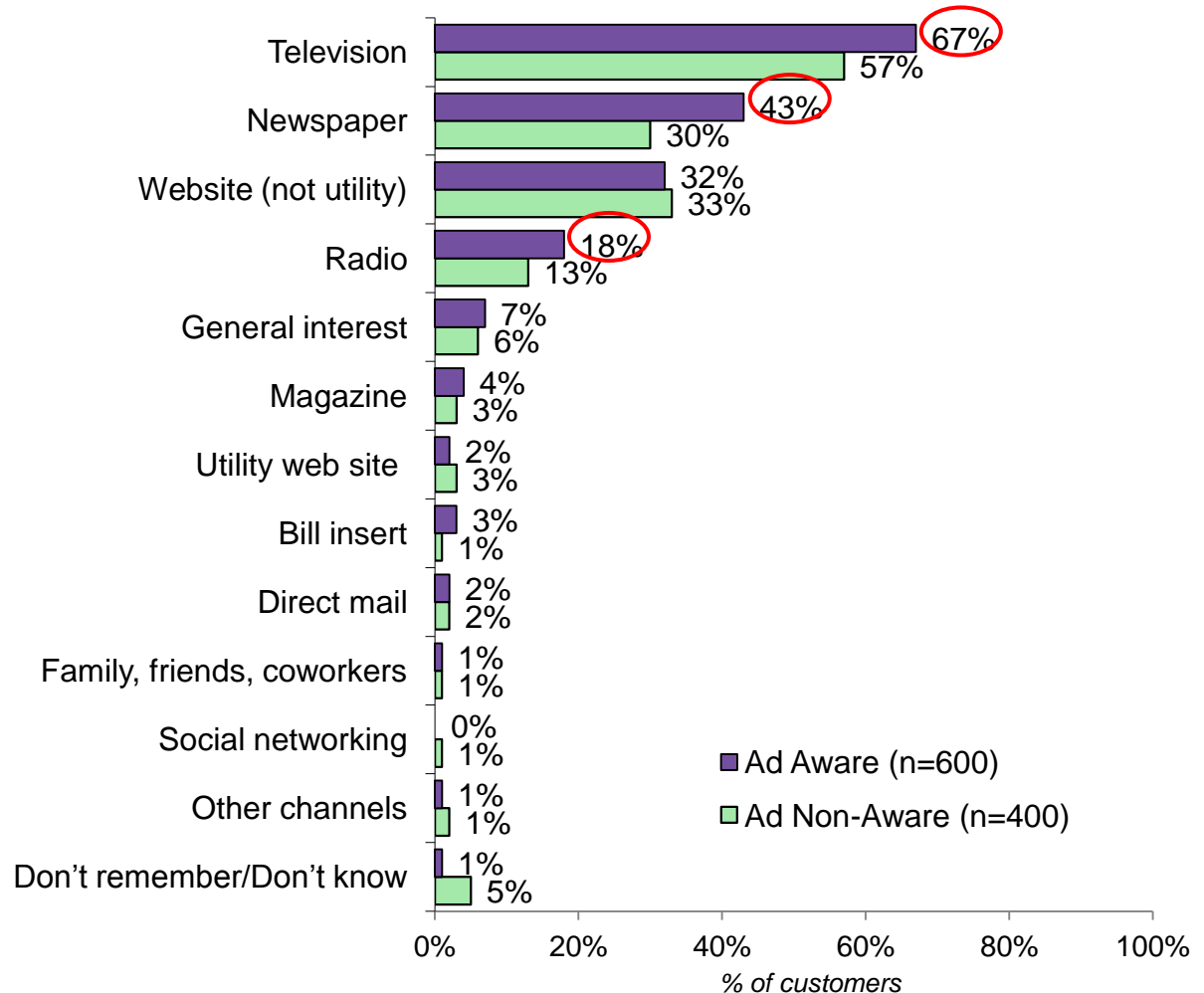


Communication Sources

News & Current Event Sources 2011

- Television, newspapers and websites are the primary sources for news and current events.
- Ad Aware customers are more likely to rely on television, newspaper and radio as news sources.
- Rocky Mountain Power customers (35%) are significantly more likely than Pacific Power customers (29%) to use a website, other than the utility's, as a news source.
- Customers age 35 and older favor traditional information channels (television and newspapers) whereas younger customers (age 18-34) are significantly more likely to rely on websites (not utility) (56% vs. 25%).

News & Current Event Channels



○ = significantly higher than Ad Non-Aware customers

Q20 What sources do you typically rely on for information about news and current events?

News & Current Event Sources 2009-2011

- Sources of news and current events are consistent with previous years; television and newspapers remain the primary sources, followed by websites and radio.
 - Ad Non-Aware customers mentioned television, newspaper and website other than utility's significantly less than in previous years.

News & Current Event Sources	2009		2010		2011	
	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=438)	Ad Non-Aware (n=300)	Ad Aware (n=600)	Ad Non-Aware (n=400)
Television	68%	68%	64%	62%	67%	57%
Newspaper	52%	41%	48%	38%	43%	30%
Website (not utility)	30%	27%	30%	27%	32%	33%
Radio	25%	18%	21%	15%	18%	13%
General internet	n/a	n/a	3%	4%	7%	6%
Magazine	5%	2%	4%	2%	4%	3%
Utility website	3%	2%	2%	1%	2%	3%
Bill insert	3%	2%	2%	2%	3%	1%
Direct mail	3%	3%	3%	2%	2%	2%
Family, friends, coworkers	2%	5%	3%	4%	1%	1%
Social networking	3%	1%	3%	3%	<1%	1%
Other channels	3%	3%	2%	1%	1%	3%
Don't remember/Don't know	1%	4%	1%	6%	1%	5%

RED = significant difference with 2009

BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010

Q20 What sources do you typically rely on for information about news and current events?

Utility Information Sources 2009-2011

- Sources of utility information remain consistent with last year, with bill inserts, television, newspapers and direct mail being the primary sources. However, websites have increased in popularity and are now also a primary source for utility information.

Utility Information Sources	2009		2010		2011	
	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=438)	Ad Non-Aware (n=300)	Ad Aware (n=600)	Ad Non-Aware (n=400)
Bill insert	42%	42%	38%	40%	41%	34%
Television	24%	11%	27%	13%	30%	11%
Website (Pacific Power/Rocky Mt. Power)	12%	9%	12%	6%	20%	18%
Newspaper	18%	11%	18%	10%	14%	9%
Direct mail	19%	16%	15%	12%	11%	12%
Website (not utility)	4%	3%	6%	4%	6%	4%
Radio	6%	2%	5%	3%	7%	2%
Call customer service	3%	3%	1%	1%	2%	3%
Family, friends, coworkers	2%	2%	2%	4%	1%	1%
Other channels	7%	3%	6%	4%	4%	4%
Don't remember/Don't know	8%	18%	9%	22%	8%	20%

Q21 What sources do you typically rely on for information about UTILITY?

RED = significant difference with 2009

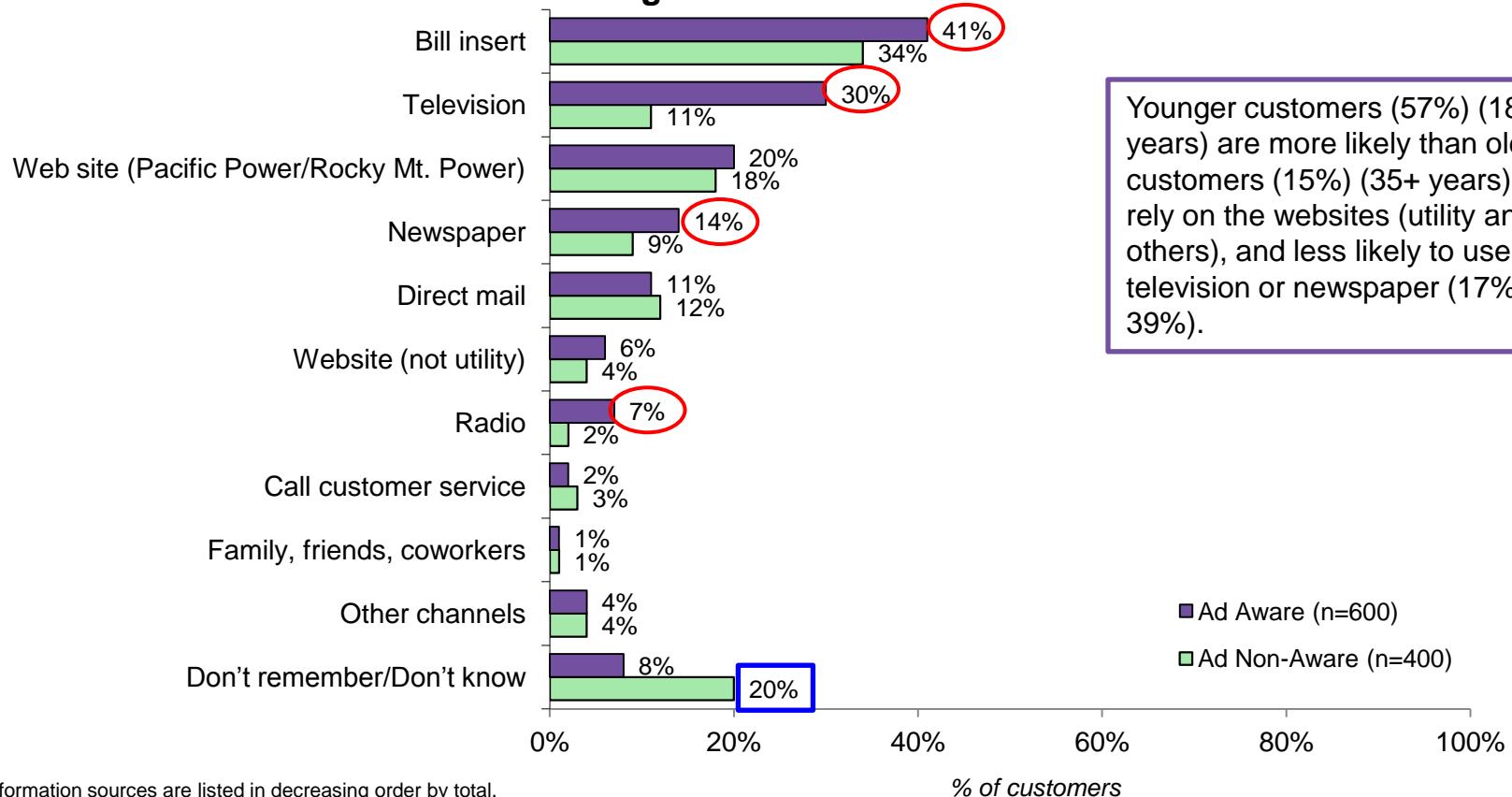
BLUE = significant difference with 2010

GREEN = significant difference with 2009 and 2010

Utility Information Sources 2011

- Bill inserts are the primary source for utility information.
- Ad Aware customers are more likely to utilize *bill insert*, *television*, *newspaper*, and *radio* as sources for information about their utility.

Advertising & Communication Channels



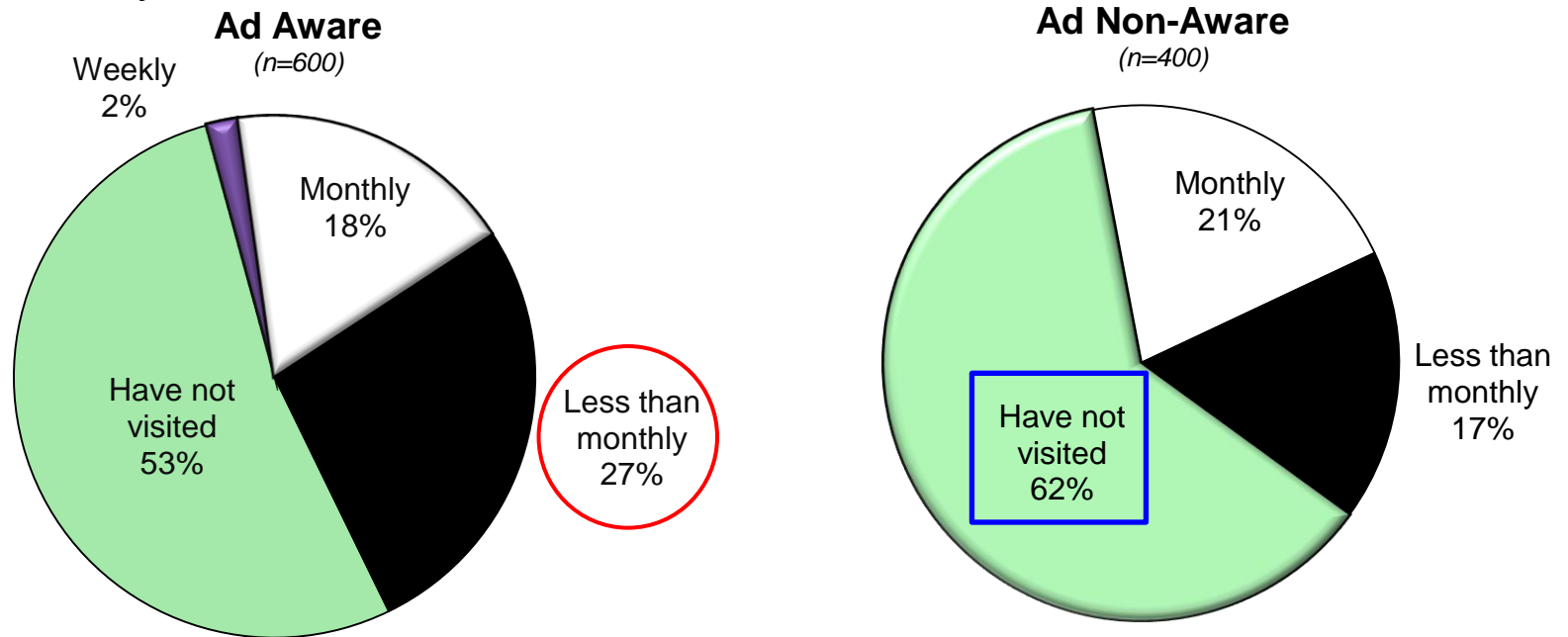
Younger customers (57%) (18-34 years) are more likely than older customers (15%) (35+ years) to rely on the websites (utility and others), and less likely to use the television or newspaper (17% vs. 39%).

*Information sources are listed in decreasing order by total.

Q21 What sources do you typically rely on for information about UTILITY?

Visiting Electric Utility Website

- Nearly half (47%) of Ad Aware and one third (38%) of Ad Non-Aware customers have visited their electric utility's website, a slight increase since 2009 (Aware - 38%, Non-Aware – 24%) and 2010 (Aware - 41%, Non-Aware – 25%).
- Of those who have visited their utility's website, more than half (52%) visit their utility's website *less than monthly*.



○ = significantly higher than Ad Non-Aware customers
 □ = significantly higher than Ad Aware customers

Q22/N23 Have you ever visited the UTILITY website? How often do you visit UTILITY website?
 *No tracking data for Q23 as a result of a wording change



Energy Efficiency Programs

Energy Efficiency Awareness 2011

- Roughly one third (32%) of respondents are aware of energy efficiency programs offered by Pacific Power and Rocky Mountain Power.
 - Utah has significantly higher awareness of energy efficiency programs than all other states, except for Washington.

EE Awareness	Oregon (n=200)	Washington (n=150)	California (n=150)	Utah (n=200)	Wyoming (n=150)	Idaho (n=150)
Yes	32%	35%	32%	42%	30%	32%
No	64%	63%	65%	54%	67%	65%
Don't remember/Don't know	4%	2%	3%	4%	3%	3%

EE1 Are you aware of any energy efficiency programs that are currently offered by UTILITY to help you save electricity and lower your bill?

Unaided EE Program Recall 2011

- Of those that are aware of Energy Efficiency Programs, Rocky Mountain Power customers are more likely to be able to name a program, unaided.
 - Customers in Idaho are more aware of “Time of Day” than all other states.
 - Utah customers are more aware of “Cool Keeper” program.
 - Oregon customers are less aware of “See Ya Later, Refrigerator” program than all other states.

Program Recall	Oregon (n=200)	Washington (n=150)	California (n=150)	Utah (n=200)	Wyoming (n=150)	Idaho (n=150)
Energy Star New Homes	4%	3%	3%	4%	1%	1%
Home Energy Savings	4%	4%	5%	6%	7%	6%
Low Income Weatherization	4%	2%	4%	2%	2%	1%
Home Energy Analysis	2%	1%	2%	4%	3%	2%
Blue Sky	2%	0%	1%	1%	0%	1%
Cool Cash Incentive	1%	1%	1%	1%	1%	3%
Powerforward	1%	1%	1%	1%	1%	0%
Wattsmart	1%	5%	2%	6%	5%	5%
See Ya Later, Refrigerator	1%	7%	5%	9%	10%	5%
Time of Day	1%	1%	0%	0%	0%	8%
Cool Keeper	0%	1%	0%	13%	1%	1%
None	77%	67%	71%	53%	66%	61%

EE2 What energy efficiency or conservation programs are you aware of from UTILITY?

Total EE Program Recall 2011

- Customers' awareness of a select group of programs was also measured. The following combines both unaided and aided awareness of each program.
 - Only residents of Utah were asked about "Energy Star New Homes," "Cool Cash Incentive" and "Cool Keeper."
- Utah customers are significantly less aware of the "Low Income Weatherization" program than all other states.
- Both Washington and Utah customers showed a significantly higher awareness of the "See Ya Later, Refrigerator" program than all other states.

Program Recall	Oregon (n=200)	Washington (n=150)	California (n=150)	Utah (n=200)	Wyoming (n=150)	Idaho (n=150)
Energy Star New Homes	n/a	n/a	n/a	46%	n/a	n/a
Home Energy Savings	53%	61%	59%	66%	51%	57%
Low Income Weatherization	43%	47%	53%	27%	35%	37%
Cool Cash Incentive	n/a	n/a	n/a	41%	n/a	n/a
Wattsmart	41%	51%	47%	59%	45%	45%
See Ya Later, Refrigerator	35%	81%	55%	78%	57%	52%
Cool Keeper	n/a	n/a	n/a	59%	n/a	n/a

EE2 What energy efficiency or conservation programs are you aware of from UTILITY?

EE3 Now I'm going to read you a description of energy efficiency program offered by UTILITY. For each, please let me know if you were aware of it before this call.

Energy Trust of Oregon Awareness 2011

- Half of all respondents from Oregon have heard of the Energy Trust of Oregon.
 - Of these respondents, half (47%) are aware that Pacific Power and the Energy Trust of Oregon work together as partners on energy efficiency programs for Oregon utility customers.

Have you ever heard of the Energy Trust of Oregon?

	Oregon (n=200)
Yes	52%
No	46%
Don't remember/Don't know	2%



Are you aware that Pacific Power and the Energy Trust of Oregon work together as partners on energy efficiency programs for Oregon utility customers?

	Oregon (n=103)
Yes	47%
No	51%
Don't remember/Don't know	2%

OR2 What energy efficiency or conservation programs are you aware of from UTILITY?



OR3 Now I'm going to read you a description of energy efficiency program offered by UTILITY. For each, please let me know if you were aware of it before this call.



2011 Demographics

Demographics



Customer Tenure	Ad Aware		Ad Non-Aware	
	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
1-4 years	19%	23%	18%	23%
5-9 years	15%	17%	15%	22%
10-14 years	14%	9%	12%	11%
15-19 years	7%	8%	9%	10%
20-24 years	6%	7%	13%	4%
25-29 years	4%	5%	3%	2%
30-39 years	14%	10%	10%	11%
40-49 years	7%	13%	9%	9%
50+ years	12%	6%	12%	9%

 = significantly higher than Ad Non-Aware/Ad Aware customers
 = significantly higher than other utility

Demographics

Age	Ad Aware		Ad Non-Aware	
	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
18-34	20%	29%	12%	27%
35-54	28%	30%	26%	31%
55+	49%	41%	57%	42%
Refused	2%	<1%	4%	0%



Income	Ad Aware		Ad Non-Aware	
	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Less than \$15,000	15%	6%	15%	6%
\$15-\$30,000	21%	14%	17%	19%
\$30-\$50,000	15%	16%	14%	23%
\$50-\$75,000	19%	24%	20%	21%
\$75-\$100,000	6%	17%	6%	2%
Over \$100,000	6%	13%	6%	14%
Don't know	4%	1%	3%	4%
Refused	14%	10%	19%	10%

 = significantly higher than Ad Non-Aware/Ad Aware customers
 = significantly higher than other utility

Demographics

Education	Ad Aware		Ad Non-Aware	
	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Less than high school	5%	2%	9%	2%
High school graduate	27%	22%	20%	31%
Some college	24%	28%	29%	20%
Undergraduate college degree	13%	25%	13%	16%
Some graduate school	8%	4%	8%	6%
Completed graduate school	17%	16%	15%	21%
Trade or technical school graduate	4%	2%	3%	1%
Don't know	<1%	1%	1%	<1%
Refused	2%	<1%	4%	2%

Gender	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Male	52%	54%	55%	58%
Female	48%	46%	45%	42%

 = significantly higher than Ad Non-Aware/Ad Aware customers
 = significantly higher than other utility



Appendix A - Weighting

Appendix A – Incidence Weights

Incidence	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	311	21%	1.522565006	473.5177168	32%
Washington	126,665	7%	256	17%	0.422090074	108.055059	7%
California	45,148	3%	215	15%	0.179138335	38.51474206	3%
Utah	787,550	46%	269	18%	2.497550815	671.8411693	46%
Wyoming	133,770	8%	222	15%	0.514036822	114.1161745	8%
Idaho	70,281	4%	193	13%	0.310648385	59.95513837	4%
	1,718,484	100%	1466	100%	1	1466	100%

PP Incidence	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	311	40%	1.920125467	597.1590201	76%
Washington	126,665	17%	256	33%	0.532302987	136.2695647	17%
California	45,148	6%	215	27%	0.225913559	48.57141521	6%
	726,883	100%	782	100%	1	782	100%

RMP Incidence	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	269	39%	2.01950532	543.246931	79%
Wyoming	133,770	13%	222	32%	0.415647237	92.27368669	13%
Idaho	70,281	7%	193	28%	0.251188509	48.47938233	7%
	991,601	100%	684	100%	1	684	100%

Incidence - aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	141	17%	1.931126505	272.2888371	32%
Washington	126,665	7%	173	21%	0.35916384	62.13534429	7%
California	45,148	3%	119	14%	0.186111683	22.14729029	3%
Utah	787,550	46%	152	18%	2.541655174	386.3315864	46%
Wyoming	133,770	8%	149	18%	0.440407332	65.62069242	8%
Idaho	70,281	4%	109	13%	0.316295866	34.47624942	4%
	1,718,484	100%	843	100%	1	843	100%

Appendix A – Incidence Weights

Incidence - aware PP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	141	33%	2.34504957	330.6519894	76%
Washington	126,665	17%	173	40%	0.436148024	75.45360808	17%
California	45,148	6%	119	27%	0.226003383	26.89440254	6%
	726,883	100%	433	100%	1	433	100%

Incidence - aware RMP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	152	37%	2.142305726	325.6304703	79%
Wyoming	133,770	13%	149	36%	0.371209737	55.3102508	13%
Idaho	70,281	7%	109	27%	0.266598889	29.05927888	7%
	991,601	100%	410	100%	1	410	100%

Incidence - NOT aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	170	27%	1.183699292	201.2288796	32%
Washington	126,665	7%	83	13%	0.553249575	45.9197147	7%
California	45,148	3%	96	15%	0.170494289	16.36745178	3%
Utah	787,550	46%	117	19%	2.440252845	285.5095829	46%
Wyoming	133,770	8%	73	12%	0.664321672	48.49548206	8%
Idaho	70,281	4%	84	13%	0.303320107	25.47888895	4%
	1,718,484	100%	623	100%	1	623	100%

Incidence - NOT aware PP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	170	49%	1.567688416	266.5070307	76%
Washington	126,665	17%	83	24%	0.732722369	60.81595663	17%
California	45,148	6%	96	28%	0.225802215	21.67701267	6%
	726,883	100%	349	100%	1	349	100%

Incidence - NOT aware RMP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	117	43%	1.859969749	217.6164607	79%
Wyoming	133,770	13%	73	27%	0.506348437	36.9634359	13%
Idaho	70,281	7%	84	31%	0.231191708	19.42010345	7%
	991,601	100%	274	100%	1	274	100%

Appendix A – Total Weights

Total (n=1,000)	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	200	20%	1.614999034	322.9998068	32%
Washington	126,665	7%	150	15%	0.491382715	73.70740723	7%
California	45,148	3%	150	15%	0.175146621	26.27199322	3%
Utah	787,550	46%	200	20%	2.291409172	458.2818345	46%
Wyoming	133,770	8%	150	15%	0.518945768	77.84186527	8%
Idaho	70,281	4%	150	15%	0.272647287	40.89709302	4%
	1,718,484	100%	1000	100%	1	1000	100%

PP Total	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	200	40%	1.909076151	381.8152302	76%
Washington	126,665	17%	150	30%	0.580859185	87.12887769	17%
California	45,148	6%	150	30%	0.207039281	31.05589208	6%
	726,883	100%	500	100%	1	500	100%

RMP Total	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	200	40%	1.985551648	397.1103297	79%
Wyoming	133,770	13%	150	30%	0.449676836	67.45152536	13%
Idaho	70,281	7%	150	30%	0.2362543	35.43814498	7%
	991,601	100%	500	100%	1	500	100%

Total - Aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	100	17%	1.937998841	193.7998841	32%
Washington	126,665	7%	114	19%	0.387933722	44.22444434	7%
California	45,148	3%	86	14%	0.183292976	15.76319593	3%
Utah	787,550	46%	101	17%	2.722466343	274.9691007	46%
Wyoming	133,770	8%	112	19%	0.417009993	46.70511916	8%
Idaho	70,281	4%	87	15%	0.282048917	24.53825581	4%
	1,718,484	100%	600	100%	1	600	100%

Appendix A – Total Weights

Total - aware PP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	100	33%	2.290891381	229.0891381	76%
Washington	126,665	17%	114	38%	0.45857304	52.27732661	17%
California	45,148	6%	86	29%	0.216669014	18.63353525	6%
	726,883	100%	300	100%	1	300	100%

Total - aware RMP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	101	34%	2.359071265	238.2661978	79%
Wyoming	133,770	13%	112	37%	0.361347457	40.47091522	13%
Idaho	70,281	7%	87	29%	0.244401	21.26288699	7%
	991,601	100%	300	100%	1	300	100%

Total - NOT aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	100	25%	1.291999227	129.1999227	32%
Washington	126,665	7%	36	9%	0.818971191	29.48296289	7%
California	45,148	3%	64	16%	0.164199958	10.50879729	3%
Utah	787,550	46%	99	25%	1.851643776	183.3127338	46%
Wyoming	133,770	8%	38	10%	0.819388055	31.13674611	8%
Idaho	70,281	4%	63	16%	0.259664083	16.35883721	4%
	1,718,484	100%	400	100%	1	400	100%

Total - NOT aware PP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	100	50%	1.527260921	152.7260921	76%
Washington	126,665	17%	36	18%	0.968098641	34.85155107	17%
California	45,148	6%	64	32%	0.194099325	12.42235683	6%
	726,883	100%	200	100%	1	200	100%

Total - NOT aware RMP	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	99	50%	1.60448618	158.8441319	79%
Wyoming	133,770	13%	38	19%	0.710016056	26.98061014	13%
Idaho	70,281	7%	63	32%	0.225004095	14.17525799	7%
	991,601	100%	200	100%	1	200	100%

Appendix A – Aware Weights

Total Aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	32%	100	17%	1.937998841	193.7998841	32%
Washington	126,665	7%	114	19%	0.387933722	44.22444434	7%
California	45,148	3%	86	14%	0.183292976	15.76319593	3%
Utah	787,550	46%	101	17%	2.722466343	274.9691007	46%
Wyoming	133,770	8%	112	19%	0.417009993	46.70511916	8%
Idaho	70,281	4%	87	15%	0.282048917	24.53825581	4%
	1,718,484	100%	600	100%	1	600	100%

PP Ad Aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Oregon	555,070	76%	100	33%	2.290891381	229.0891381	76%
Washington	126,665	17%	114	38%	0.45857304	52.27732661	17%
California	45,148	6%	86	29%	0.216669014	18.63353525	6%
	726,883	100%	300	100%	1	300	100%

RMP Ad Aware	Customer Count	% of Customers	# Completes	% of Completes	Weight	Weighted n	Weighted %
Utah	787,550	79%	101	34%	2.359071265	238.2661978	79%
Wyoming	133,770	13%	112	37%	0.361347457	40.47091522	13%
Idaho	70,281	7%	87	29%	0.244401	21.26288699	7%
	991,601	100%	300	100%	1	300	100%