



Customer Awareness Advertising Campaign Research

Pacific Power and Rocky Mountain Power

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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 fourth wave, conducted in May 2012.

Methodology

- A total of seven hundred (n=700) interviews were conducted with residential customers, evenly divided between Pacific Power and Rocky Mountain Power.
 - The interviews were conducted by telephone between May 9 and May 20, 2012. All participants were interviewed by Market Decisions’ in-house Research Associates.
 - A list of 45,000 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
- A proportionate random sampling plan within each utility was utilized:

Pacific Power (n=350)			Rocky Mountain Power (n=350)		
Aware		Non-Aware	Aware		Non-Aware
n=200		n=150	n=200		n=150
Oregon	Washington	California	Utah	Wyoming	Idaho
n=266	n=62	n=22	n=277	n=47	n=26

- An over sampling of n=153 WY customers conducted in order to report on the Wyoming customer base independently. The Wyoming oversample is excluded from the primary findings, and covered in a separate report.

Methodology (cont.)

- Data were weighted by utility in order to analyze a population proportionate total across all Pacific Power and Rocky Mountain Power customers.

- The data was weighted to be representative of the customer base (counts provided by PacifiCorp):

Pacific Power		Rocky Mountain Power	
# of Customers	% of PacifiCorp Total	# of Customers	% of PacifiCorp Total
726,883	42%	991,601	58%

- The maximum sampling variability for each customer segment at the 95% confidence level is shown below:
 - Total (n=700) yields a maximum sample variability of +/-3.7% at the 95% confidence level.
 - Pacific Power/Rocky Mountain Power (n=350) yields a maximum sample variability of +/-5.2% at the 95% confidence level.
 - Ad Aware (n=400) yields a maximum sample variability of +/-4.9% at the 95% confidence level.
 - Ad Aware by Pacific Power/Rocky Mountain Power (n=200) yields a maximum sample variability of +/-6.9% at the 95% confidence level.
 - Ad Non-Aware (n=300) yields a maximum sample variability of +/-4.9% at the 95% confidence level.
 - Ad Non-Aware by Pacific Power/Rocky Mountain Power (n=150) yields a maximum sample variability of +/-8.0% at the 95% confidence level.



Key Findings

- Overall company awareness of Pacific Power and Rocky Mountain Power remains high, but has decreased among Pacific Power Ad Aware customers and Rocky Mountain Power Ad Non-Aware customers.
 - Ad Aware: Pacific Power 89% (96% 2011); Rocky Mountain Power 91% (91% 2011)
 - Ad Non-Aware: Pacific Power 84% (88% 2011); Rocky Mountain Power 83% (90% 2011)
- Reported advertising/communication awareness has increased for Pacific Power and remained stable for Rocky Mountain Power.
 - Pacific Power Aware: 63% 2009, 57% 2010, 50% 2011 and 58% 2012.
 - Rocky Mountain Power: 67% 2009, 66% 2010, 58% 2011 and 57% 2012
- Rocky Mountain Power Ad Aware customers indicate they were exposed to an average of 14 ads compared to 10 among Pacific Power Ad Aware customers.
 - This is consistent with trends observed in previous years.
- The advertisements/communications from Pacific Power/Rocky Mountain Power continue to have a positive impact on customer perceptions of the company.
 - One third (34% Pacific Power; 36% 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 (16%) of customers rate the impact as “unfavorable.”
 - Ad Aware customers remain significantly more likely to be satisfied with their utility company than those Ad Non-Aware; satisfaction has declined among Pacific Power Ad Non-Aware customers from 2011 to 2012 (68% 2011 vs. 56% 2012).
- The most frequently recalled messages remain using energy wisely, and energy efficiency programs.
 - Recall of energy efficiency programs, renewable or alternative energy, and billing or energy assistance have increased significantly among Pacific Power customers.
 - Recall of using energy wisely, energy efficiency programs, and preparing for power outages have increased significantly among Rocky Mountain Power customers.



Key Findings

- The perception of ads and communications from Pacific Power and Rocky Mountain Power remains useful, informative, believable and likeable.
- Recall of “Let’s Turn the Answers On” is significantly higher among Rocky Mountain Power customers and Ad Aware customers.
 - “Let’s Turn the Answers On” – Rocky Mountain Power 33% vs. Pacific Power 19% and Ad Aware 35% vs. 17% Ad Non-Aware.
- Recall of “Being Wattsmart” has increased within Pacific Power, and remains higher among Ad Aware customers. Pacific Power recall is now statistically consistent with Rocky Mountain Power.
 - “Being Wattsmart” – Ad Aware 66% vs. 31% Ad Non-Aware; Pacific Power 47% 2012 vs. 33% 2011.
- Three in ten (30%) customers report having taken action based on the advertisement or communication seen from the company. This represents a significant increase for Pacific Power and a significant decrease for Rocky Mountain Power.
 - Pacific Power: 30% 2012 vs. 21% 2011; Rocky Mountain Power: 30% 2012 vs. 39% 2011
 - The most frequently mentioned actions taken remain: purchased/switched to energy efficient appliances/lights, turning off lights/appliances when not in use, more aware of power usage and enlisting in utility incentive/rebate program.
- As observed last year, television and newspapers are the primary sources for news and current events, followed closely by websites.
 - Customers most commonly turn to bill inserts for information about their utility.
- Roughly one third of customers are aware that Pacific Power/Rocky Mountain Power offer energy efficiency programs.
 - Utah and Idaho have the highest awareness.

2009-2012: Ad Aware Customers

Ad Aware Customers Differences 2009-2012	2009	2010	2011	2012
% very satisfied overall with company	79%	73%	72%	74%
Company awareness (aided + unaided): Pacific Power	90%	87%	96%	89%
Company awareness (aided + unaided): Rocky Mountain Power	90%	87%	91%	92%
Unaided company awareness: Pacific Power	77%	77%	90%	81%
Unaided company awareness: Rocky Mountain Power	66%	70%	73%	73%
% who are very favorable toward <i>UTILITY</i> as a result of ad/communications	30%	34%	36%	35%
% who see, hear or read <i>UTILITY</i> advertisements via TV	40%	61%	60%	47%
% who see, hear or read <i>UTILITY</i> advertisements via bill inserts	37%	19%	25%	31%
% who see, hear or read <i>UTILITY</i> advertisements via direct mail	18%	10%	11%	17%
% who recall message of renewable or alternative energy (unaided)	21%	13%	16%	8%
% who strongly agree messages are informative	51%	47%	51%	54%
% who recall "Let's Turn the Answers On"	23%	33%	44%	35%
% who recall "Being Wattsmart"	n/a	n/a	65%	66%
% who took action based on advertisement	27%	26%	31%	30%

BLUE = significantly higher than 2011

RED = significantly lower than 2011



2009-2012 : Ad Non-Aware Customers

Ad Non-Aware Customers Differences 2009-2012	2009	2010	2011	2012
Company awareness (aided + unaided): Pacific Power	72%	66%	88%	84%
Company awareness (aided + unaided): Rocky Mountain Power	74%	62%	90%	83%
Unaided company awareness: Pacific Power	62%	55%	79%	73%
Unaided company awareness: Rocky Mountain Power	51%	44%	77%	66%
% who rely on TV for news and current events	68%	62%	57%	61%

BLUE = significantly higher than 2011
 RED = significantly lower than 2011



Ad Aware vs. Ad Non-Aware Customers

2012 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% very satisfied overall with company	74%	64%
% who mentioned their electric utility top-of-mind unaided: Pacific Power	81%	73%
% who mentioned their electric utility unaided: Pacific Power	89%	84%
% recall "Let's Turn the Answers On"	35%	17%
% recall "Being Wattsmart"	66%	31%
% who say that their satisfaction with the <i>UTILITY</i> has increased over the past year	8%	9%
% who strongly agree <i>UTILITY</i> is committed to keeping customers safe around electricity	70%	65%
% who strongly agree <i>UTILITY</i> has plans to meet future energy needs	43%	37%
% who strongly agree <i>UTILITY</i> has programs that help protect the environment%%	41%	34%
% who strongly agree <i>UTILITY</i> provides reliable and dependable power: Rocky Mountain Power	79%	77%

RED = significant difference



Ad Aware vs. Ad Non-Aware Customers

2012 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	58%	61%
% who typically rely on newspaper as a source for information about news and current events	41%	36%
% who typically rely on radio as a source for information about news and current events	21%	17%
% who typically rely on bill inserts as a source for information about <i>UTILITY</i>	38%	35%
% who typically rely on television as a source for information about <i>UTILITY</i>	19%	14%
% who typically rely on newspaper as a source for information about <i>UTILITY</i>	8%	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 2009-2012

- Top of mind awareness for both Pacific Power and Rocky Mountain Power remains high.
 - 2012 Pacific Power top of mind awareness decreased significantly from 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%

2012 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=288)	Rocky Mt. Power (n=261)	Pacific Power (n=206)	Rocky Mt. Power (n=189)
Pacific Power/PPL	81%	3%	73%	4%
Rocky Mountain Power/Utah Power	--	73%	1%	66%

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

BLUE = significantly higher than 2011

RED = significantly lower than 2011

Top of Mind Unaided Company Awareness 2012

- 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 fifths of Pacific Power customers (73%) and Rocky Mountain Power customers (66%) mention their utility first.

2012 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=288)	Rocky Mt. Power (n=261)	Pacific Power (n=206)	Rocky Mt. Power (n=189)
Pacific Power/PPL	81%	3%	73%	4%
Rocky Mountain Power/Utah Power	0%	73%	1%	66%
Pacific Gas & Electric/PG&E	6%	1%	7%	1%
Portland General/PGE	2%	0%	2%	0%
NW Natural	3%	0%	4%	0%
Avista	1%	0%	<1%	0%
PacifiCorp	1%	0%	2%	1%
Mountain Fuel/Questar	0%	17%	<1%	20%
Other	6%	6%	9%	10%
None	0%	0%	<1%	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?

81% = significantly higher than Ad Non-Aware customers
9% = significantly higher than Ad Aware customers

Total Unaided Company Awareness 2009 - 2012

- Total awareness significantly decreased in 2012 among Pacific Power Ad Aware customers when compared to 2011 (89% vs. 96%).

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%
2012 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=288)</i>	Rocky Mt. Power <i>(n=261)</i>	Pacific Power <i>(n=206)</i>	Rocky Mt. Power <i>(n=189)</i>
Pacific Power/PPL	89%	4%	84%	8%
Rocky Mountain Power/Utah Power	<1%	92%	1%	83%

Q1/Q2 When you think of electric or gas utilities, what electric or gas utilities come to mind?

BLUE = significantly higher than 2011



RED = significantly lower than 2011

Total Unaided Company Awareness 2012

- Rocky Mountain Power Ad Aware customers are significantly more likely to be aware of Rocky Mountain Power than Rocky Mountain Power Ad Non-Aware customers.

2012 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=288)	Rocky Mt. Power (n=261)	Pacific Power (n=206)	Rocky Mt. Power (n=189)
Pacific Power/PPL	89%	4%	84%	8%
Rocky Mountain Power/Utah Power	<1%	91%	1%	83%
Pacific Gas & Electric/PG&E	12%	3%	12%	4%
NW Natural	15%	<1%	12%	1%
Avista	6%	0%	9%	0%
Portland General/PGE	7%	<1%	4%	1%
Cascade	5%	0%	6%	0%
Mountain Fuel/Questar	1%	56%	2%	51%
Other	22%	21%	18%	22%

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

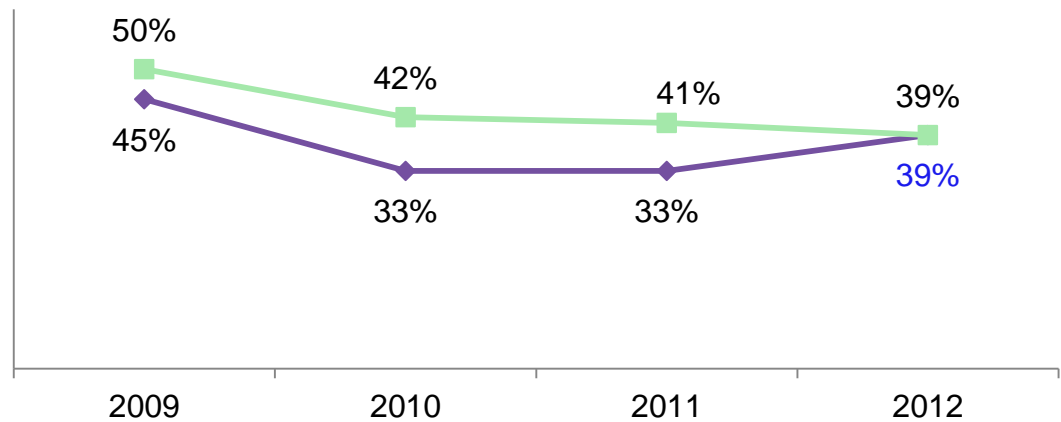
 = significantly higher than Ad Non-Aware customers
 = significantly higher than Ad Aware customers

Q1/Q2 When you think of electric or gas utilities, what electric or gas utilities come to mind?

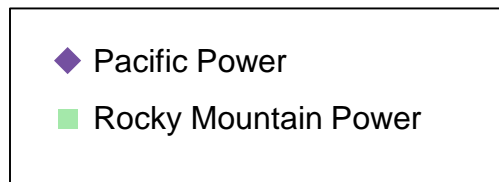
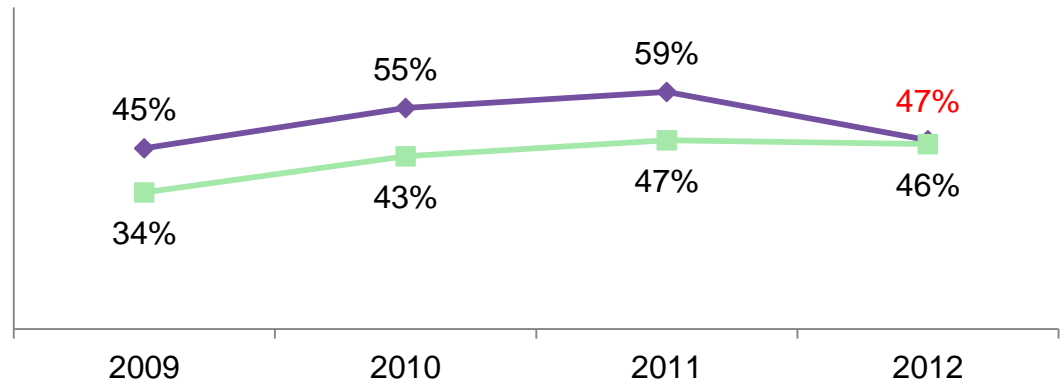
Unaided Advertisement Awareness 2009-2012

- 2012 levels of unaided awareness among Rocky Mountain Power customers are in line with figures seen in 2011.
- The percentage of Pacific Power customers who are not aware of any utility communication has decreased significantly from 2011.

% Unaided Utility Communication Awareness



% Unaided Not Aware of Any Utility Communications



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 2012

- Two fifths of Pacific Power (39%) and Rocky Mountain Power (39%) customers recall an advertisement or communication from their electric company during the past six months (unaided).
- One third of Rocky Mountain Power (30%) customers have unaided recall of Mountain Fuel/Questar advertisements.

2012 Unaided Ad Awareness	Pacific Power (n=494)	Rocky Mt. Power (n=450)
Pacific Power/PPL	39%	2%
NW Natural	7%	0%
Pacific Gas & Electric/PG&E	6%	<1%
Avista	2%	0%
Portland General/PGE	2%	0%
PacifiCorp	1%	<1%
Mountain Fuel/Questar	1%	30%
Rocky Mountain Power/Utah Power	<1%	39%
Other	7%	7%
None	47%	46%

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

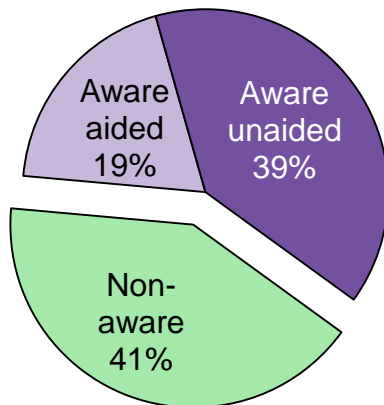
Q3 *During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?*

Total Advertisement Awareness

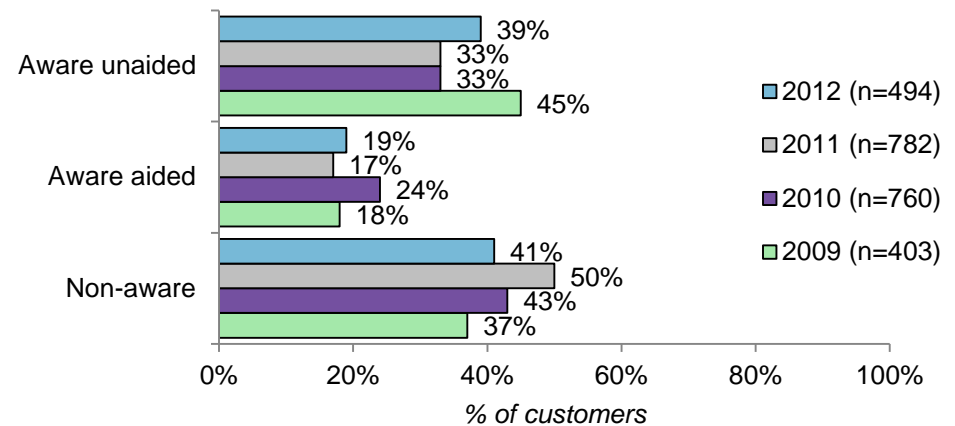
Pacific Power

- Total advertising recall combines unaided recall (previous pages) and aided recall of advertisements or communications during the past 6 months.
- In total, 58% of Pacific Power customers are aware of the company's advertisements or communications, showing an increase from the 2011 awareness (50%), and consistent with levels from 2009 to 2010.

2012 Pacific Power
(n=494)



Advertisement Awareness



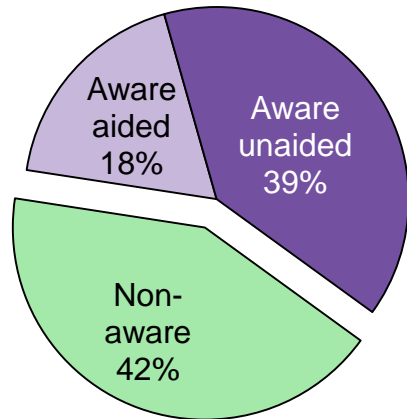
Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

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

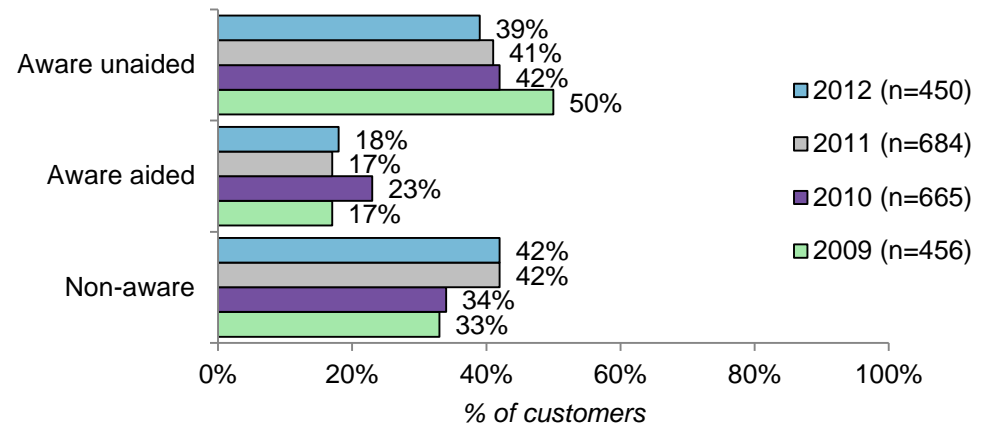
Total Advertisement Awareness Rocky Mountain Power

- In total, 57% of Rocky Mountain Power customers are aware of the company's advertisements or communications, consistent with 2011 awareness.

2012 Rocky Mountain Power
(n=450)



Advertisement 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?

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

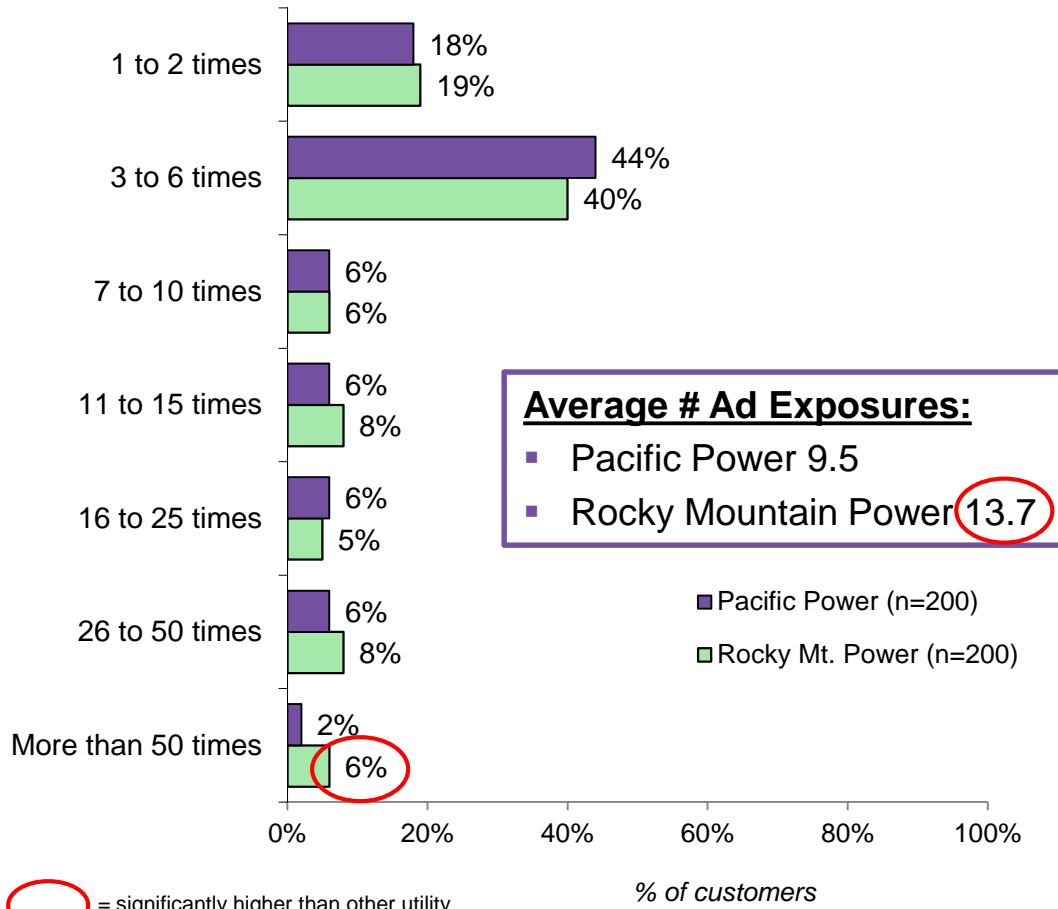


Advertising & Communication Recall

- 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

2012 Number of Recalled Advertising Exposures



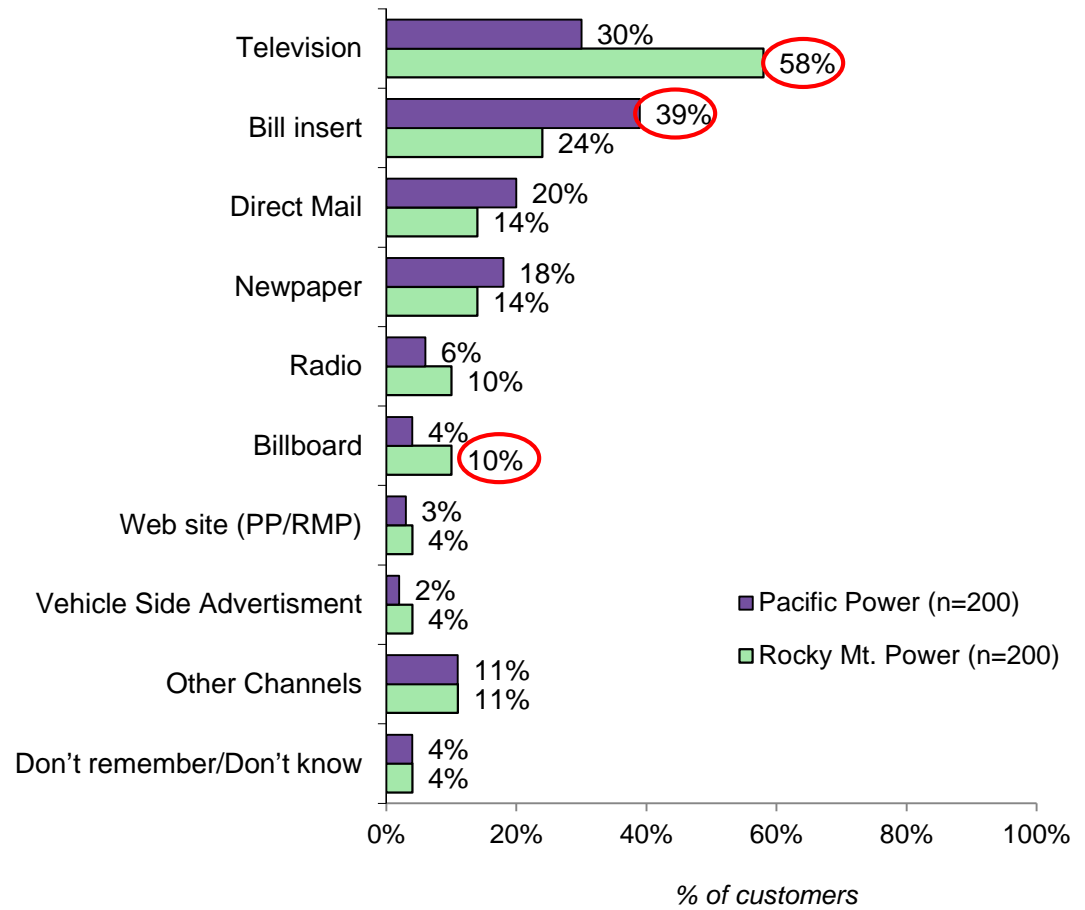
- The average number of advertising exposures recalled is significantly higher among Rocky Mountain Power customers.
- When compared to 2011, the average number of advertising exposures has significantly decreased across both utilities.

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

Advertising & Communication Channels 2012

- *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* and *billboards*.
- *Bill inserts* are mentioned significantly more frequently by Pacific Power customers.

2012 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 2009-2012

- Among Rocky Mountain Power customers, *Newspapers* decreased significantly as an advertising channel between 2011 and 2012.
 - Among the same audience, *billboards* increased significantly as an advertising channel.

Advertising & Communication Channels	2009		2010		2011		2012	
	Pacific Power	Rocky Mt. Power	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)	(n=200)	(n=200)
Television	34%	44%	49%	69%	53%	65%	30%	58%
Bill insert	42%	34%	24%	15%	33%	18%	39%	24%
Newspaper	21%	18%	27%	23%	18%	28%	18%	14%
Radio	6%	8%	5%	16%	8%	15%	6%	10%
Direct mail	19%	18%	11%	10%	14%	10%	20%	14%
Billboard	2%	4%	2%	4%	3%	4%	4%	10%
Website (PP/RMP)	< 1%	6%	5%	5%	3%	4%	3%	4%
Magazine	2%	2%	2%	0%	1%	1%	3%	<1%
Other channels	4%	5%	2%	4%	3%	6%	11%	11%
Don't remember/Don't know	4%	2%	8%	5%	2%	3%	4%	4%

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

BLUE = significantly higher than 2011

RED = significantly lower than 2011


Unaided & Aided Message Recall 2012

- 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), and “billing or energy assistance” (total). These customers are also significantly more likely to *not remember* any messages or advertisements (total).
- Rocky Mountain Power customers are significantly more likely to recall messages with content about “working to keep your power on” (total), “programs such as equal pay” (total) and “Being Wattsmart” (total) than Pacific Power customers.

Messages Recalled	Pacific Power (n=200)			Rocky Mt. Power (n=200)		
	Unaided	Aided	Total	Unaided	Aided	Total
Using energy wisely ← Highest aided recall	12%	48%	60%	20%	47%	67%
Energy efficiency programs ← Second highest aided recall	17%	40%	57%	18%	44%	62%
Renewable or alternative energy	12%	38%	50%	5%	36%	41%
Being Wattsmart	4%	34%	38%	4%	58%	62%
Working to keep your power on	2%	25%	27%	2%	32%	34%
Electrical safety	6%	32%	38%	8%	30%	38%
Billing or energy assistance	12%	36%	48%	6%	30%	36%
Programs such as equal pay/customer guarantees	1%	28%	29%	3%	30%	33%
Planning for your future energy needs	2%	21%	23%	<1%	28%	28%
Preparing for power outages	1%	39%	40%	4%	32%	36%
Transmission line projects	2%	10%	12%	1%	12%	13%
Environment friendly	2%	n/a	4%	1%	n/a	2%
Don't remember/Don't know	33%	8%	41%	36%	8%	44%

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 2009-2012

Messages Recalled	Pacific Power							
	Unaided				Aided			
	2009 (n=200)	2010 (n=220)	2011 (n=300)	2012 (n=200)	2009 (n=200)	2010 (n=220)	2011 (n=300)	2012 (n=200)
Using energy wisely	14%	14%	15%	12%	56%	49%	54%	48%
Energy efficiency programs	19%	17%	19%	17%	60%	50%	48%	40%
Renewable or alternative energy	28%	20%	22%	12%	54%	41%	43%	38%
Being Wattsmart	n/a	n/a	3%	4%	n/a	n/a	28%	34%
Working to keep your power on	3%	1%	5%	2%	27%	29%	37%	25%
Electrical safety	10%	12%	9%	6%	42%	38%	37%	32%
Billing or energy assistance	n/a	7%	6%	12%	n/a	35%	38%	36%
Programs such as equal pay/customer guarantees	10%	4%	3%	1%	31%	25%	28%	28%
Planning for your future energy needs	1%	5%	3%	2%	34%	26%	34%	21%
Preparing for power outages	1%	1%	4%	1%	42%	34%	35%	39%
Transmission line projects	1%	4%	2%	2%	12%	10%	11%	10%
Environment friendly	5%	2%	5%	2%	n/a	n/a	n/a	n/a
Don't remember/Don't know	30%	36%	37%	33%	4%	10%	5%	8%

- Overall, the three communication messages cited most often by Pacific Power customers are:
 - Using energy wisely
 - Energy efficiency programs
 - Renewable or alternative energy
- Aided, “working to keep the power on” and “planning for your future energy needs” saw a significant decrease in recall from 2011.
- Unaided, “billing or energy assistance” saw a significant increase from 2011, while “renewable or alternative energy” and “preparing for power outage” saw significant decreases.

BLUE = significantly higher than 2011
RED = significantly lower than 2011

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 2009-2012

Messages Recalled	Rocky Mt. Power							
	Unaided				Aided			
	2009 (n=200)	2010 (n=218)	2011 (n=300)	2012 (n=200)	2009 (n=200)	2010 (n=218)	2011 (n=300)	2012 (n=200)
Using energy wisely	18%	21%	19%	20%	50%	57%	59%	47%
Energy efficiency programs	31%	26%	24%	18%	52%	51%	51%	44%
Renewable or alternative energy	16%	7%	13%	5%	39%	44%	38%	36%
Being Wattsmart	n/a	n/a	3%	4%	n/a	n/a	62%	58%
Working to keep your power on	4%	4%	4%	2%	37%	36%	46%	32%
Electrical safety	8%	9%	11%	8%	36%	39%	31%	30%
Billing or energy assistance	n/a	2%	5%	6%	n/a	28%	30%	30%
Programs such as equal pay/customer guarantees	9%	7%	2%	3%	34%	29%	37%	30%
Planning for your future energy needs	5%	3%	1%	<1%	36%	32%	32%	28%
Preparing for power outages	2%	2%	2%	4%	31%	26%	27%	32%
Transmission line projects	2%	2%	2%	1%	20%	11%	18%	12%
Environment friendly	<1%	2%	4%	1%	n/a	n/a	n/a	n/a
Don't remember/Don't know	32%	33%	32%	36%	5%	7%	2%	8%

- Overall, the three communication messages cited most often by Rocky Mountain Power customers are:
 - Using energy wisely
 - Energy efficiency programs
 - Being Wattsmart
- Aided, “using energy wisely” and “working to keep your power on” saw a significant decrease in recall from 2011.
- Unaided, “renewable or alternative energy” and “environment friendly” saw significant decreases in recall from 2011.

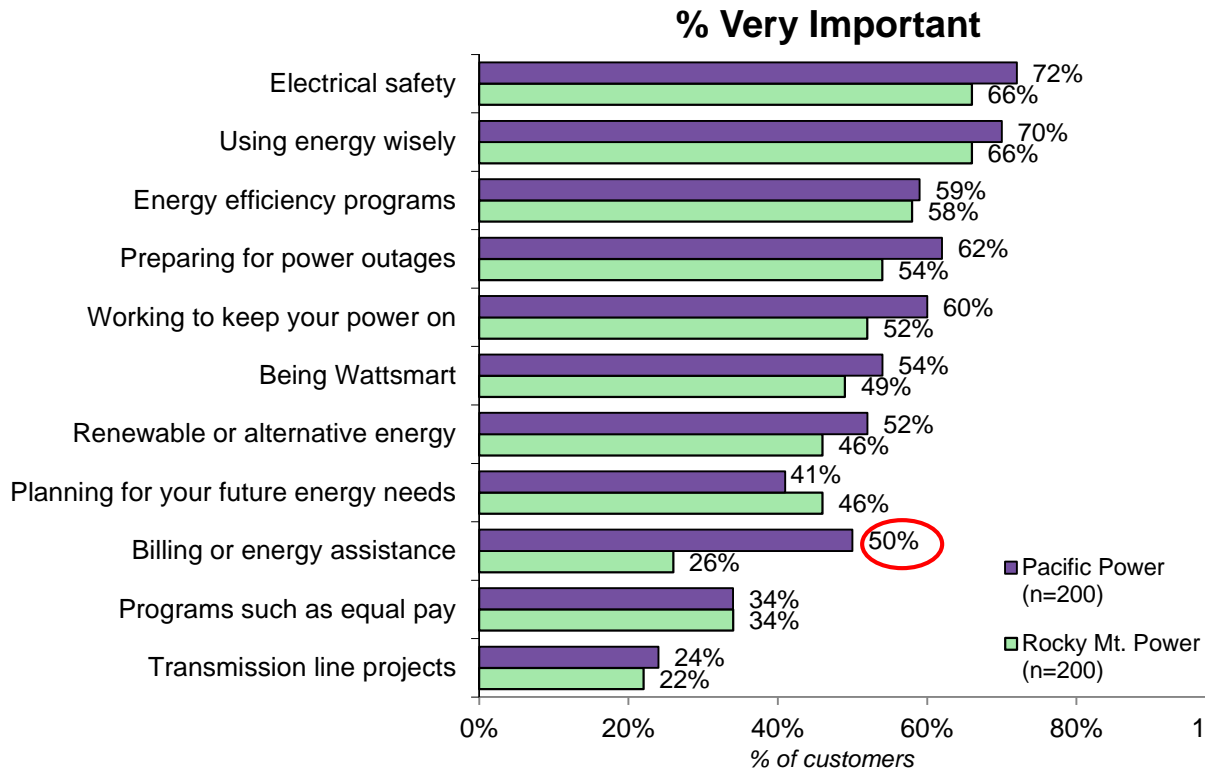
BLUE = significantly higher than 2011
RED = significantly lower than 2011

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 2012

- “Electrical safety” and “using energy wisely” remain the messages most important to customers.
 - Pacific Power customers are significantly more likely than Rocky Mountain Power customers to find “billing or energy assistance” *very important*.



% Very or Somewhat Important	
Pacific Power (n=200)	Rocky Mt. Power (n=200)
91%	92%
92%	94%
92%	92%
89%	88%
83%	84%
85%	88%
83%	82%
80%	82%
82%	74%
72%	70%
58%	60%

○ = significantly higher than other utility

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 2009-2012

- Among Pacific Power customers, “planning for your future energy needs” saw a significant decrease in being considered *very important* between 2011 and 2012.
- Since 2009, both Rocky Mountain Power and Pacific Power have seen a steady decrease in the perceived importance of “renewable or alternative energy”.

Advertising & Communication Channels (% “very important”)	2009		2010		2011		2012	
	Pacific Power	Rocky Mt. Power	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)	(n=200)	(n=200)
Electrical safety	76%	76%	75%	73%	73%	70%	72%	66%
Using energy wisely	76%	70%	69%	67%	69%	66%	70%	66%
Energy efficiency programs	72%	64%	67%	58%	62%	58%	59%	58%
Preparing for power outages	55%	52%	60%	56%	55%	51%	62%	54%
Working to keep your power on	61%	62%	69%	60%	58%	58%	60%	52%
Renewable or alternative energy	64%	60%	60%	53%	54%	47%	52%	46%
Planning for your future energy needs	57%	52%	46%	48%	52%	45%	41%	46%
Billing or energy assistance	n/a	n/a	41%	33%	43%	32%	50%	26%
Programs such as equal pay/customer guarantees	34%	32%	32%	34%	37%	33%	34%	34%
Transmission line projects	24%	24%	27%	23%	27%	25%	24%	22%

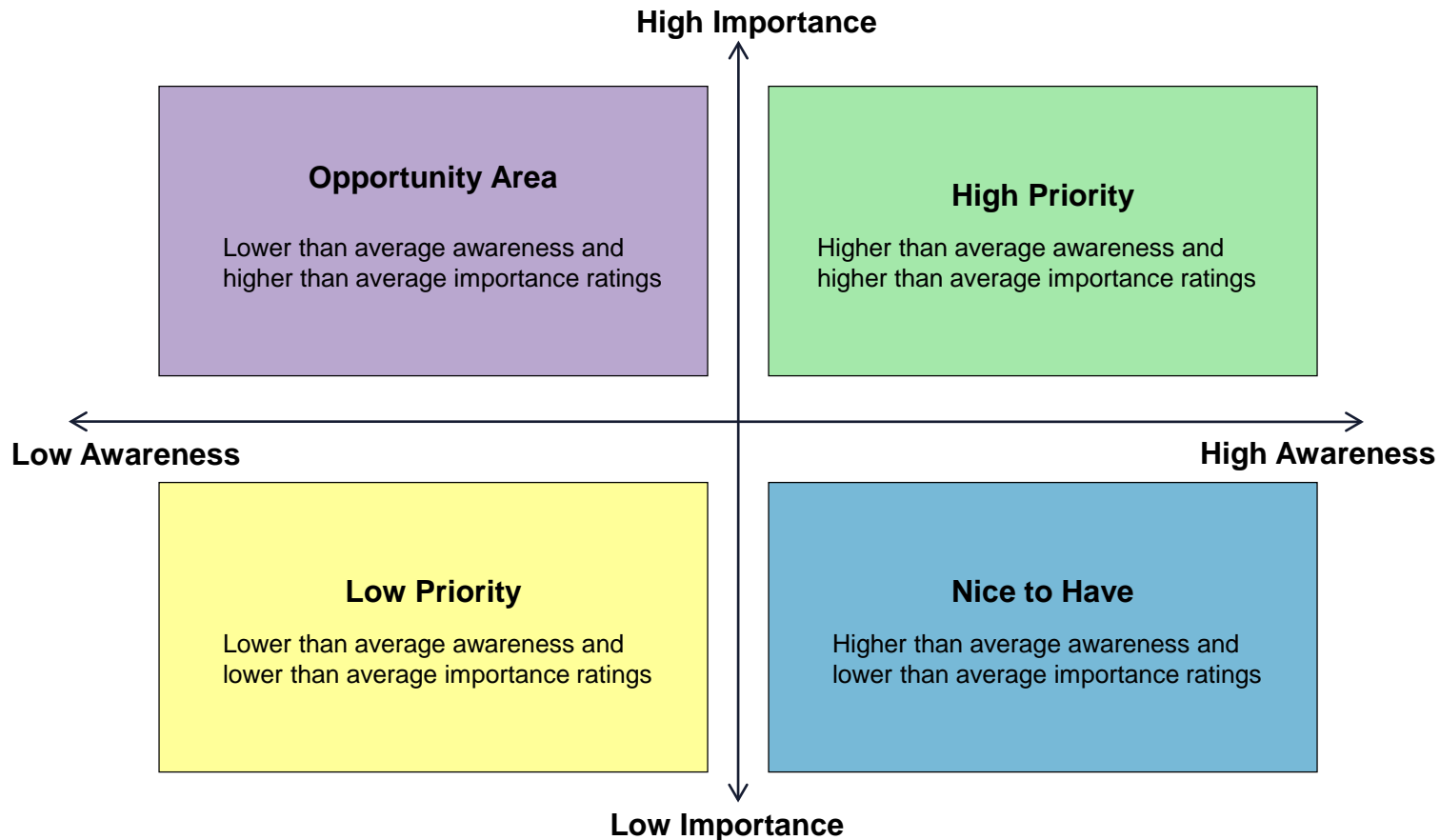
Q8 Do you think the following messages are very important, somewhat important, not very important or not at all important for UTILITY to communicate to customers like yourself?

BLUE = significantly higher than 2011

RED = significantly lower than 2011

Message Importance & Awareness Gap Analysis

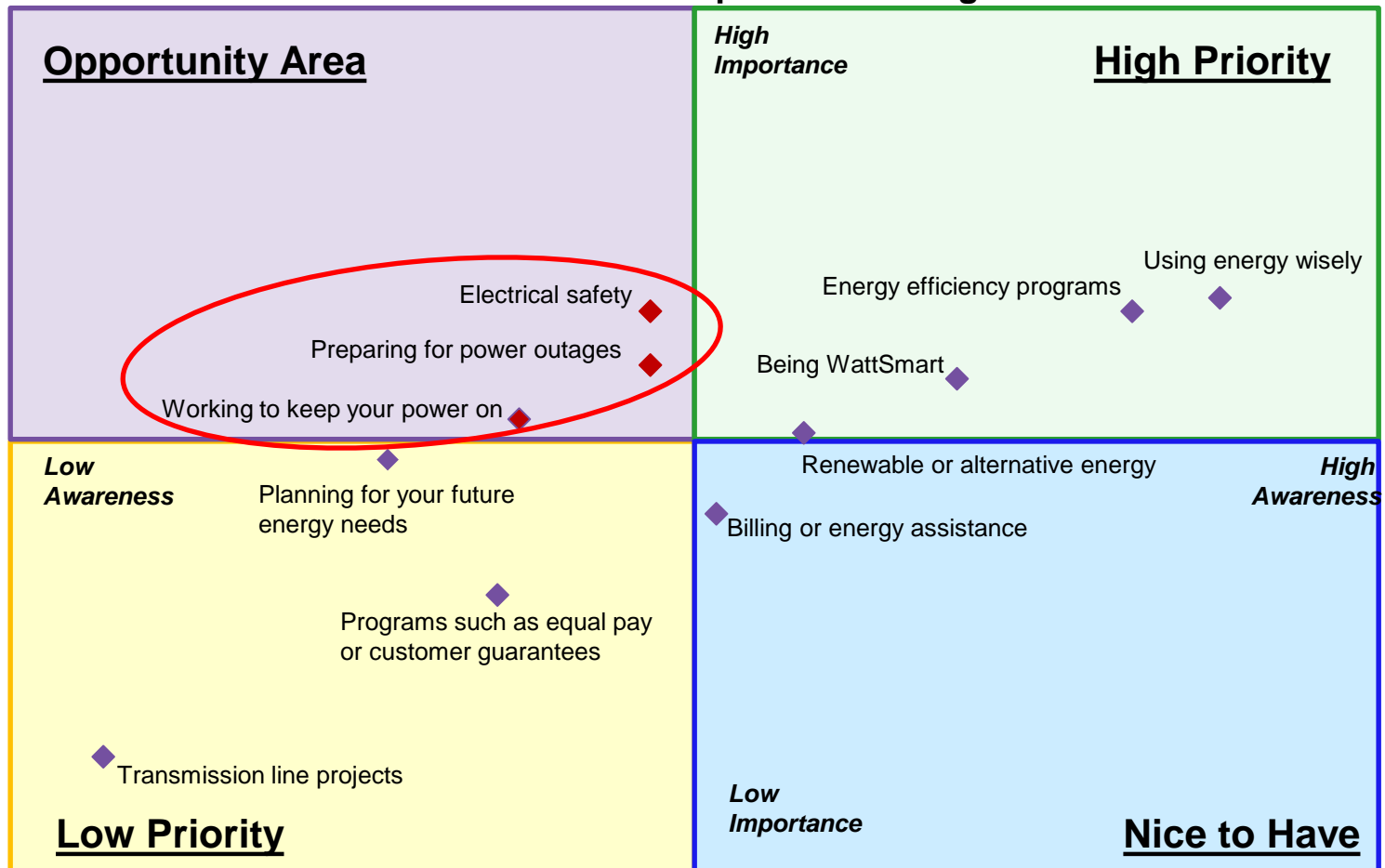
- The following slide presents a quadrant chart outlining the relative importance of each advertising message and the relative awareness of each message.
- Messages considered highly important, but with low awareness, indicate opportunity areas for Pacific Power and Rocky Mountain Power. Increasing awareness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



Message Awareness vs. Importance Ratings 2012

- Consistent with 2011, the messages “preparing for power outages” and “electrical safety” continue to have higher than average importance, but lower than average awareness, indicating an opportunity area to raise awareness.
 - In 2012, the message “working to keep your power on” moved into the opportunity quadrant.

2012 Awareness vs. Importance Ratings



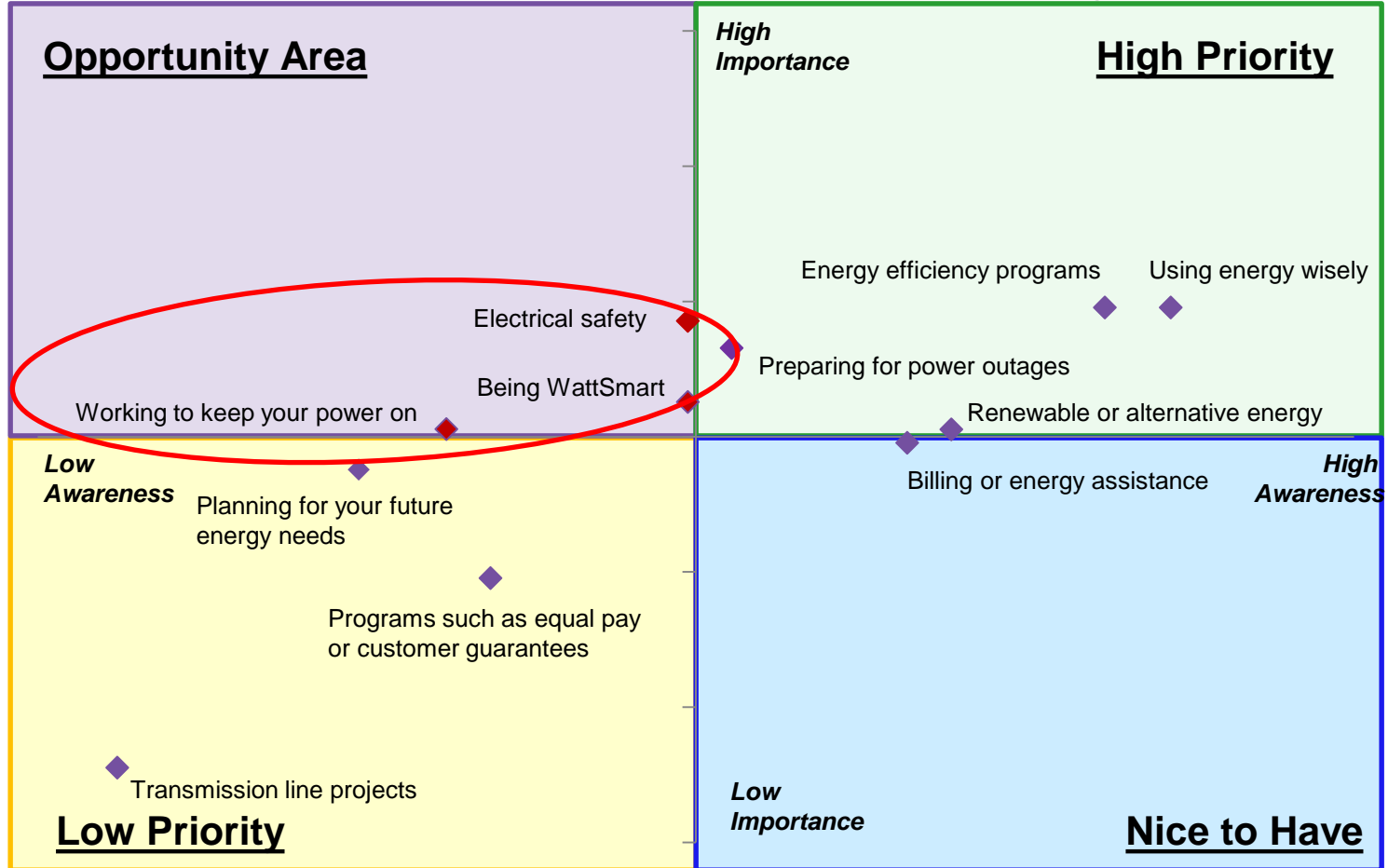


Message Awareness vs. Importance Ratings 2009-2012

	2009	2010	2011	2012
Electrical safety	Opportunity Area	High Priority	Opportunity Area	Opportunity Area
Preparing for power outages	Low Priority	Opportunity Area	Opportunity Area	Opportunity Area
Working to keep your power on	Opportunity Area	Opportunity Area	Nice to Have	Opportunity Area
Using energy wisely	High Priority	High Priority	High Priority	High Priority
Energy efficiency programs	High Priority	High Priority	High Priority	High Priority
Being Wattsmart	n/a	n/a	High Priority	High Priority
Renewable or alternative energy	High Priority	High Priority	Nice to Have	High Priority
Billing or energy assistance	n/a	Low Priority	Low Priority	Nice to Have
Planning for your future energy needs	Low Priority	Opportunity Area	Opportunity Area	Low Priority
Programs such as equal pay or customer guarantees	Low Priority	Low Priority	Low Priority	Low Priority
Transmission line projects	Low Priority	Low Priority	Low Priority	Low Priority

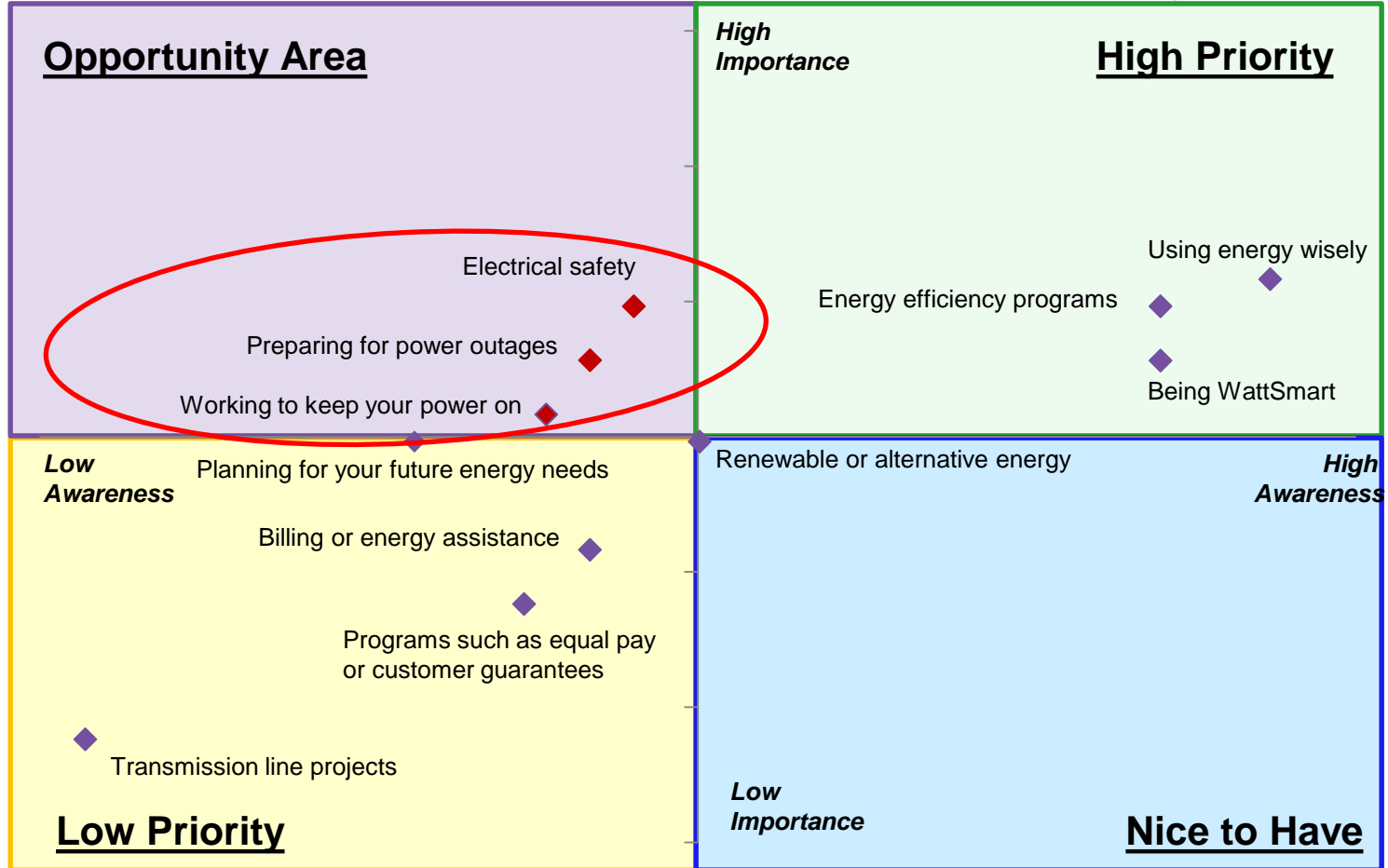
Message Awareness vs. Importance Ratings 2012 – PP

2012 Pacific Power Awareness vs. Importance Ratings



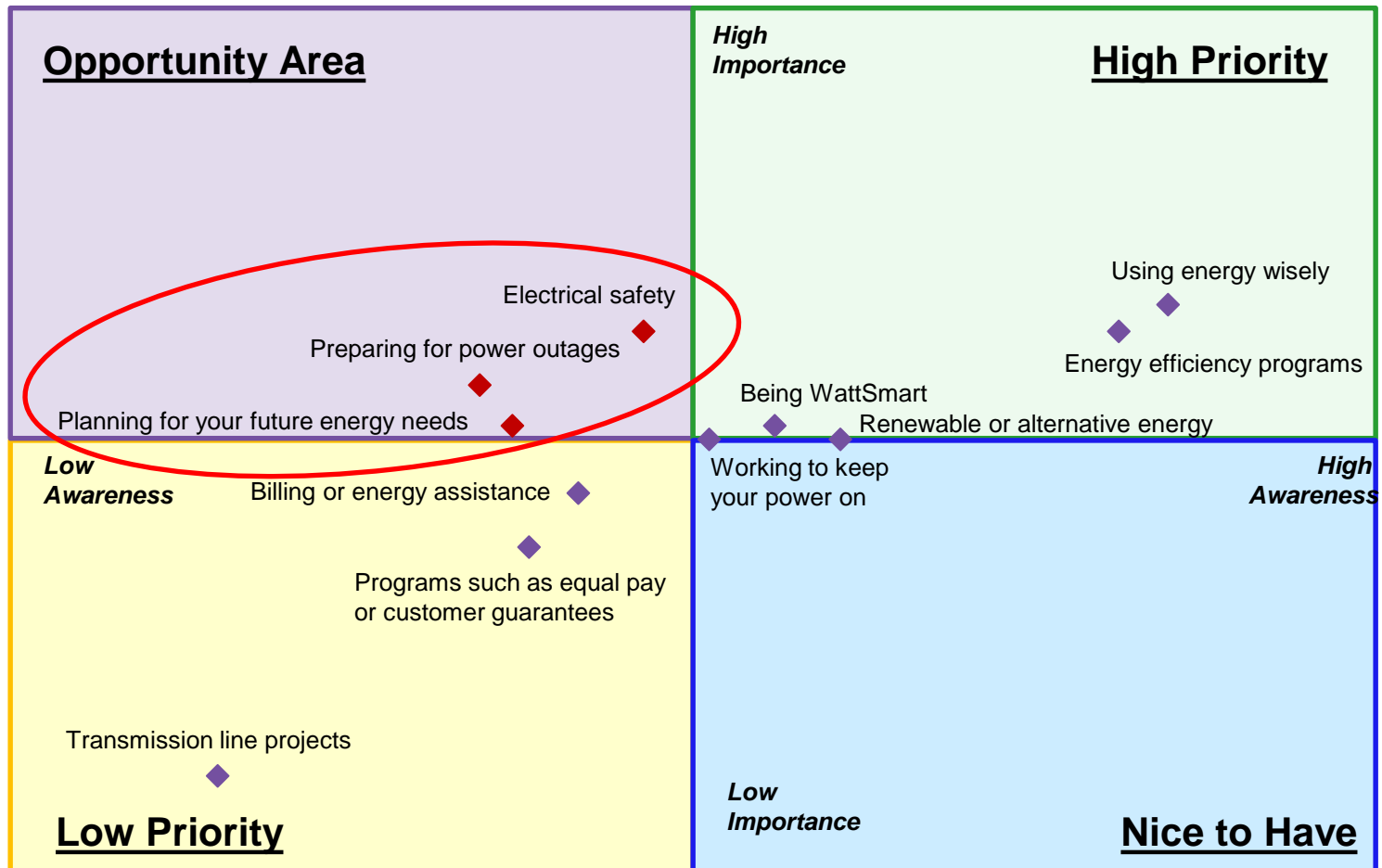
Message Awareness vs. Importance Ratings 2012 – RMP

2012 Rocky Mountain Power Awareness vs. Importance Ratings



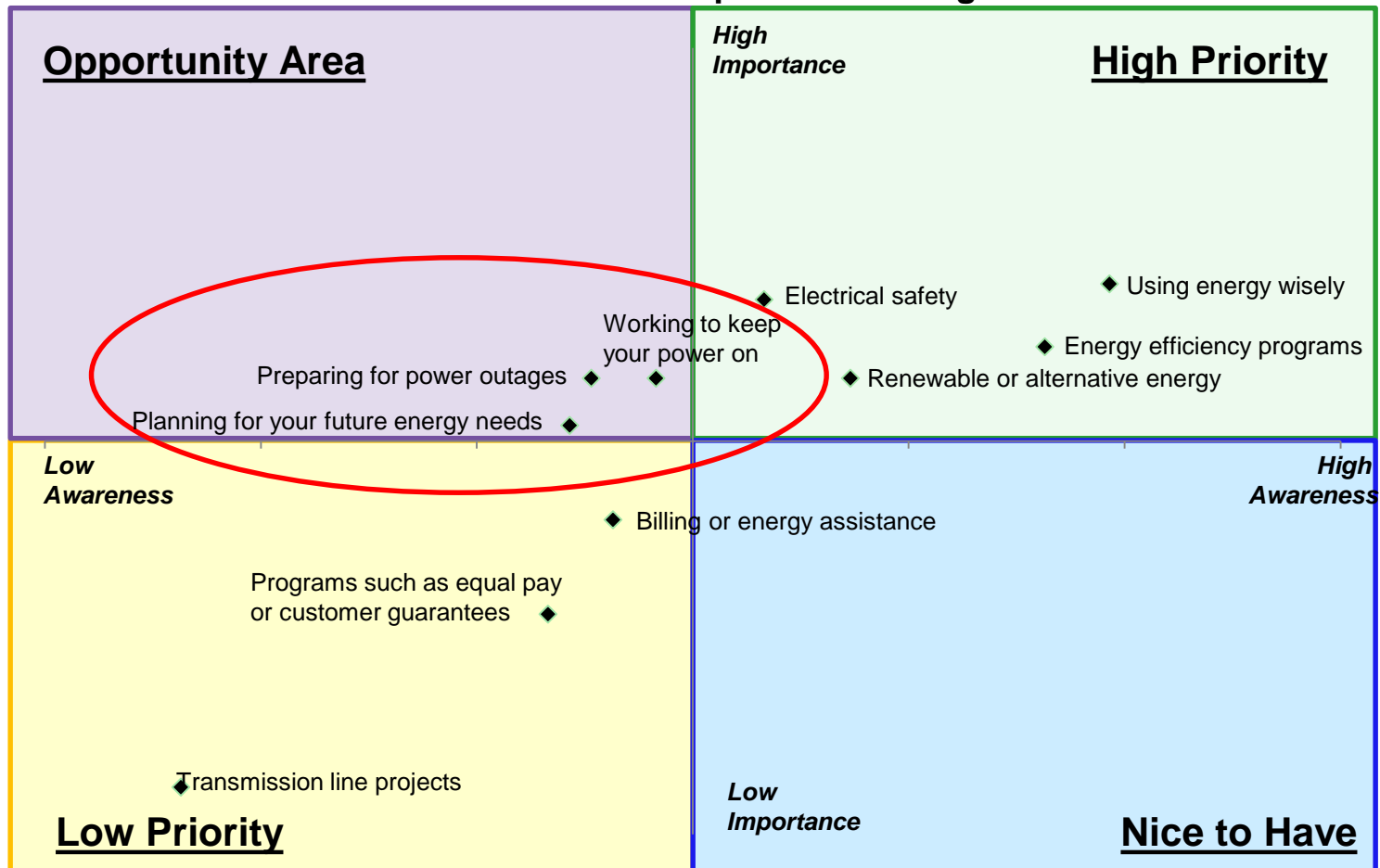
Message Awareness vs. Importance Ratings 2011

2011 Awareness vs. Importance Ratings



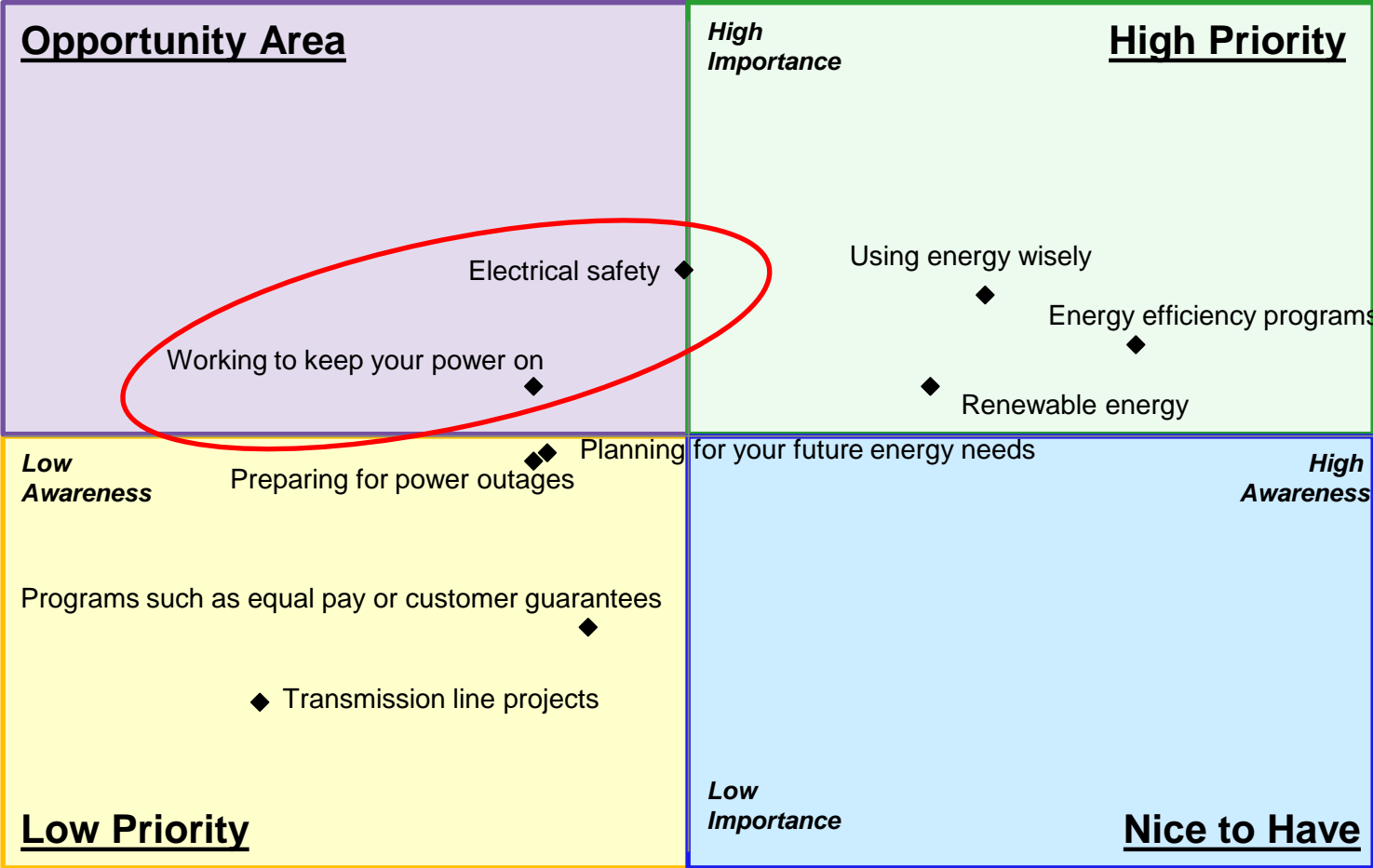
Message Awareness vs. Importance Ratings 2010

2010 Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2009

2009 Awareness vs. Importance Ratings



Additional Suggested Messages 2009-2012

- Besides the 10 messages tested on the previous slides, customers were asked for other suggested 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)	2012 (n=200)	2009 (n=200)	2010 (n=218)	2011 (n=300)	2012 (n=200)
All information provided is sufficient	22%	15%	16%	18%	24%	18%	22%	13%
Alternative Energy/Energy Efficiency	34%	19%	19%	11%	40%	18%	14%	11%
Breakdown of how to practice energy efficiency/info on energy efficient appliances	16%	10%	9%	3%	20%	9%	6%	5%
Investment in alternative (green) energy sources	14%	8%	9%	6%	14%	6%	7%	4%
Energy incentive programs	4%	1%	1%	2%	6%	3%	1%	2%
Billing and Payment	26%	17%	13%	3%	20%	12%	9%	5%
Economically sensitive billing practices/programs	18%	10%	6%	1%	14%	5%	4%	<1%
More detailed billing information/customer usage summaries	8%	7%	7%	2%	6%	7%	5%	4%
Corporate Information	19%	7%	15%	8%	19%	8%	16%	12%
Information on company decisions/practices/operations	6%	5%	5%	2%	4%	2%	8%	4%
Information on local projects	4%	1%	0%	0%	4%	1%	0%	0%
List of available services	2%	<1%	2%	<1%	4%	1%	1%	1%
Customer service access	3%	2%	3%	3%	2%	2%	4%	5%
What makes them dependable	2%	0%	2%	0%	3%	1%	2%	1%
Power outage information	2%	0%	3%	2%	2%	1%	1%	1%
Energy Safety	4%	4%	5%	2%	8%	5%	2%	<1%
Don't remember/Don't know	13%	24%	17%	14%	14%	24%	21%	23%
None/Nothing more	16%	22%	24%	32%	22%	25%	24%	31%

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

BLUE = significantly higher than 2011
RED = significantly lower than 2011

Perception of Advertisements & Communications

- Perceptions of advertisements have remained statistically unchanged since 2009.

Perception of Advertisements & Communications % Strongly Agree (8-10 ratings)	2009		2010		2011		2012	
	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)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Informative	58%	45%	46%	47%	49%	52%	54%	54%
Believable	54%	50%	48%	42%	48%	45%	44%	50%
Useful	n/a	n/a	45%	48%	49%	48%	48%	47%
Likeable	38%	34%	43%	37%	35%	35%	34%	38%

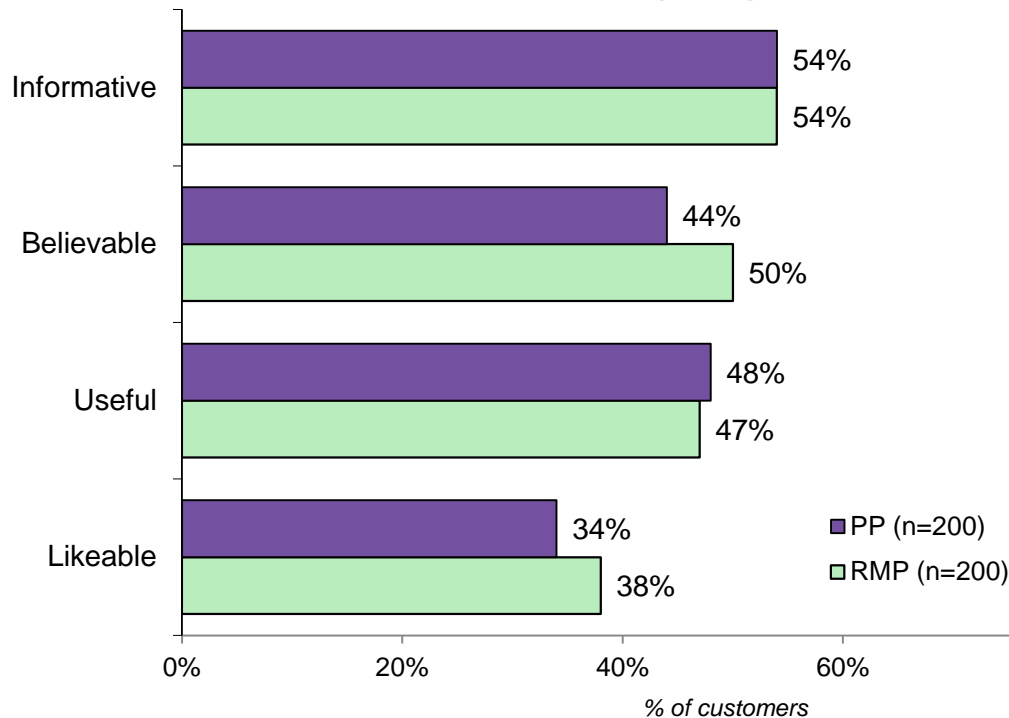
BLUE = significantly higher than 2011
RED = significantly lower than 2011

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 2012

- Roughly half perceive their utility's advertisements and communications to be *informative, believable* and *useful*.
 - One third perceive advertisements and communications to be *likeable*.
 - Pacific Power customers are more likely to strongly disagree that advertisements and communications are likeable.

% Strongly Agree (8-10)



% Strongly Disagree (0-4)	
Pacific Power (n=200)	Rocky Mt. Power (n=200)
14%	8%
14%	8%
15%	10%
22%	12%

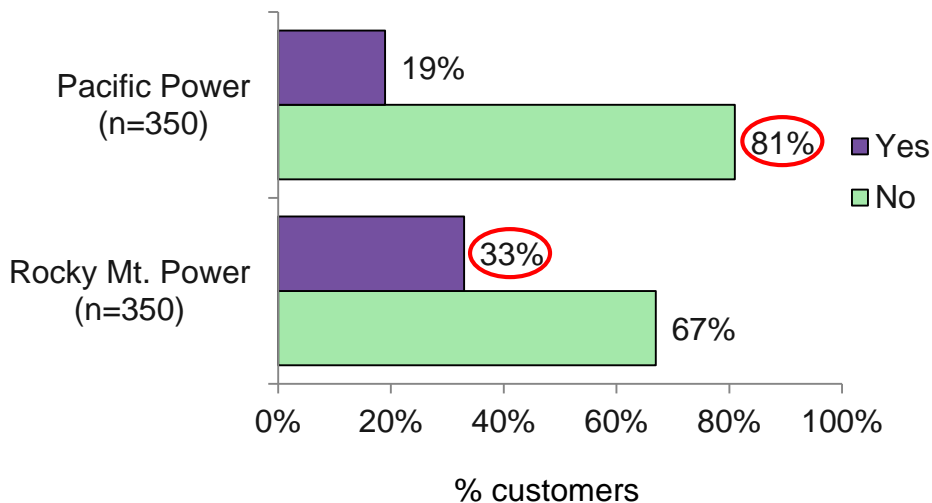
22% = significantly higher than other utility

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” 2009-2012

- Rocky Mountain Power customers remain more likely than Pacific Power customers to recall communications with the message “Let’s Turn the Answers On.”
- Among Pacific Power customers, recall of “Let’s Turn the Answers On” has remained consistent since 2009.

**2012 Recall of
“Let’s Turn the Answers On”**



2009 Pacific Power (n=200)	2010 Pacific Power (n=220)	2011 Pacific Power (n=500)	2009 Rocky Mt. Power (n=200)	2010 Rocky Mt. Power (n=218)	2011 Rocky Mt. Power (n=500)
16% yes	22% yes	20% yes	28% yes	42% yes	37% yes
84% no	78% no	80% no	72% no	58% no	63% no

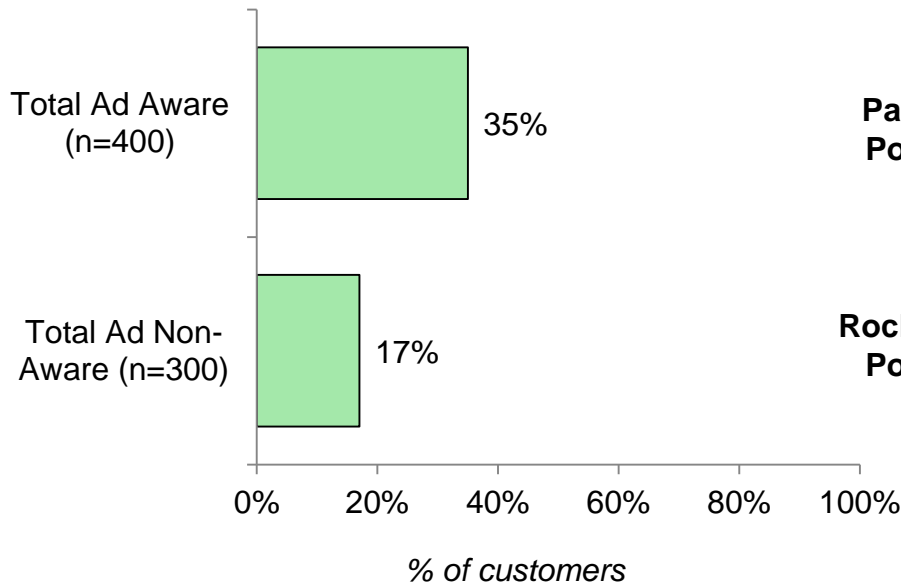
= significantly higher than other utility

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

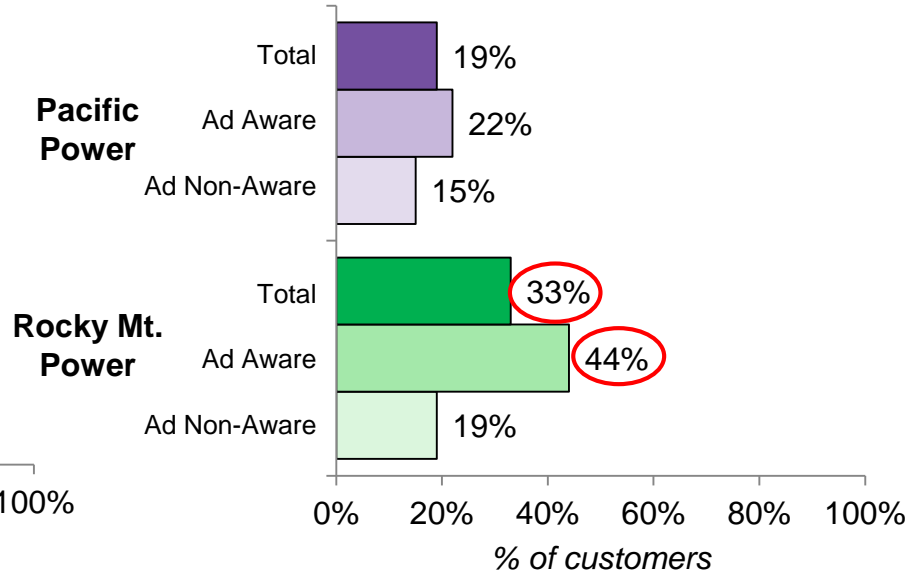
“Let’s Turn the Answers On” 2012

- One third (35%) of all Ad Aware customers recall the phrase “Let’s Turn the Answers On.”
 - Rocky Mountain Power customers are more likely to recall the phrase than Pacific Power customers.
- Customers who took action after seeing the ads are more likely to recall the phrase “Let’s Turn the Answers On” (47% vs. 30%).

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



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

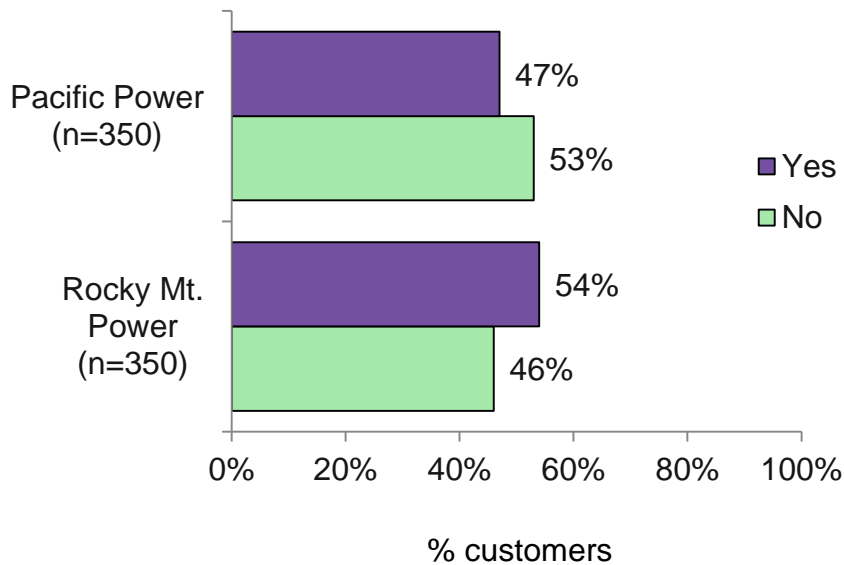


 = significantly higher than other utility

“Being Wattsmart” 2011-2012

- Recall of “Being Wattsmart” has increased significantly among Pacific Power customers since 2011.
 - No significant differences exist between utilities in 2012.

2012 Recall of
“Being Wattsmart”



2011 Pacific Power (n=500)	2011 Rocky Mt. Power (n=500)
33% yes	57% yes
67% no	43% no

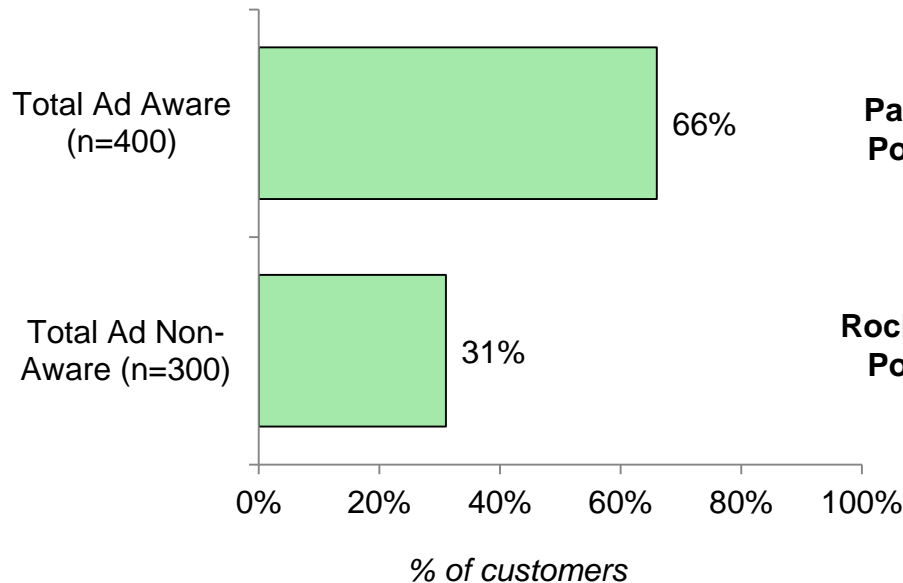
 = significantly higher than other utility

Q15B Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

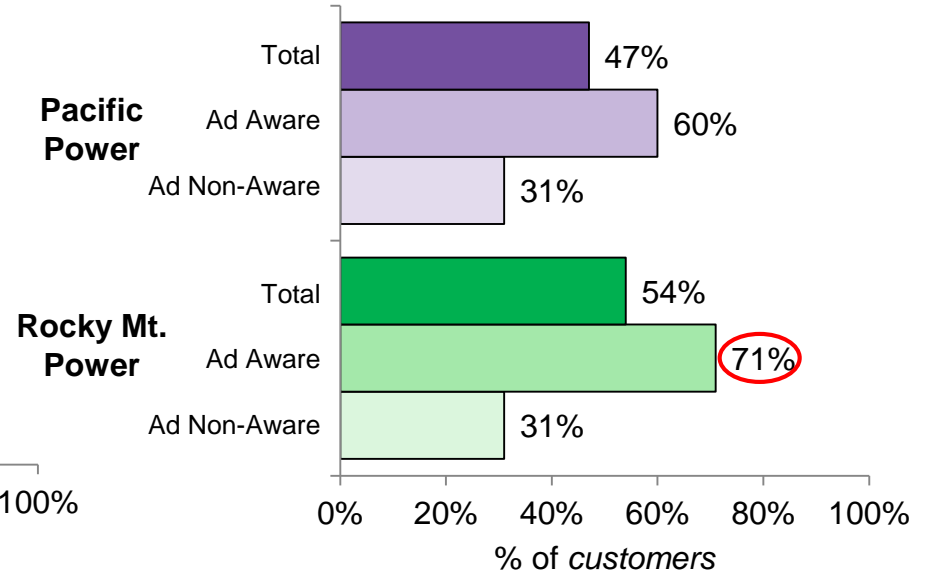
“Being Wattsmart” 2012

- Nearly two thirds (66%) 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 Ad Aware customers (71% vs. 60% Pacific Power Ad Aware)
 - Customers who have a more favorable image of their utility (82% vs. 60% moderately favorable and 54% less favorable)

**Recall of
“Being Wattsmart”**



**Recall of
“Being Wattsmart”**



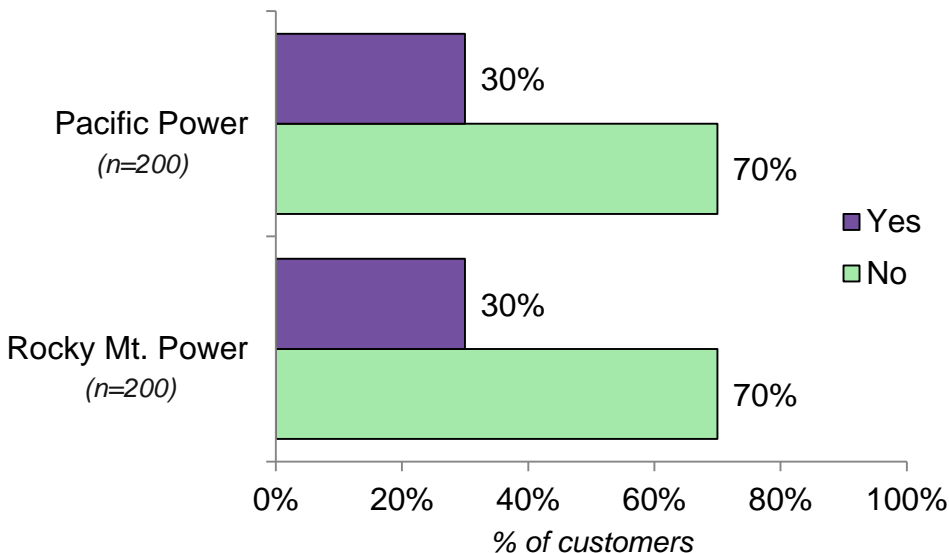
71% = significantly higher than other utility

Q15B Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

Persuasiveness of Advertising in Call to Action 2009-2012

- For Pacific Power, the percentage of customers persuaded to take action based on the advertisements has significantly increased since 2011 (30% vs. 21%).
- Rocky Mountain Power saw a significant decrease in customers who took action (30%) when compared to 2011 (39%), returning to figures consistent with 2009 and 2010.

2012 Took Action Based on Advertising



2009 Pacific Power (n=200)	2010 Pacific Power (n=220)	2011 Pacific Power (n=300)	2009 Rocky Mt. Power (n=200)	2010 Rocky Mt. Power (n=218)	2011 Rocky Mt. Power (n=300)
24% yes	22% yes	21% yes	30% yes	30% yes	39% yes
76% no	78% no	79% no	70% no	70% no	61% no

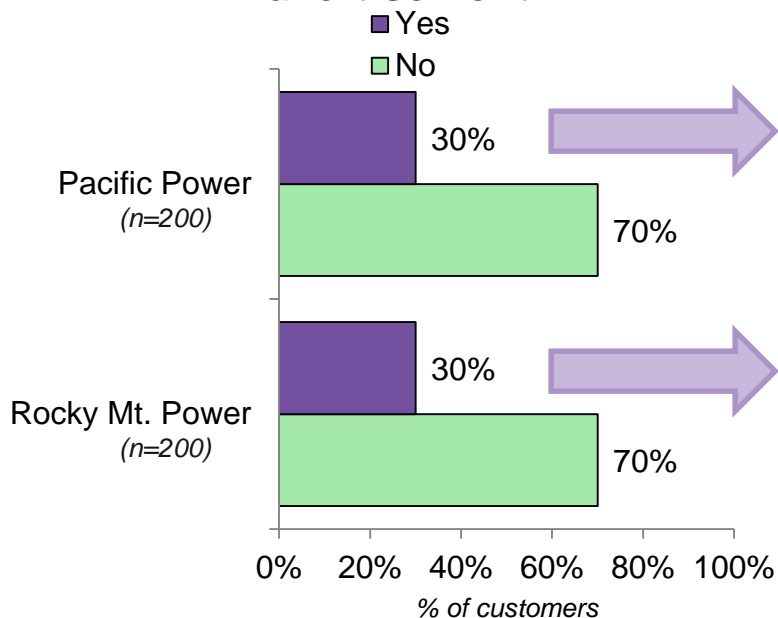
 = significantly higher than other utility

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

Actions Taken Based on Advertisements 2012

- Overall, one third (30%) 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” and “shutting off lights/appliances when not in use” 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=60)	Rocky Mt. Power (n=59)
Purchased/switched to energy efficient appliances/lights	32%	34%
Shutting off lights/appliances when not in use	15%	27%
More aware of power usage (general)	8%	17%
Enlisting in utility incentive/rebate programs	13%	10%
Changing daily use of appliances	7%	10%
Becoming more cautious of energy safety	8%	8%
Invested in equal bill pay	8%	7%
Wattsmart	8%	5%
Invested in Blue Sky program	7%	3%

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

- Consistent with 2011 figures, two thirds (68%) of Pacific Power and three fourths (78%) of Rocky Mountain Power Ad Aware customers are “very satisfied” with their utility company.

Ad Aware: <i>Advertisements' Impact on Company Satisfaction</i>	2009		2010		2011		2012	
	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)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Very satisfied (8-10 ratings)	81%	78%	75%	72%	66%	76%	68%	78%
Moderately satisfied (5-7 ratings)	16%	20%	19%	22%	28%	21%	26%	20%
Not satisfied (0-4 ratings)	2%	2%	4%	6%	5%	3%	5%	2%

BLUE = significantly higher than 2011
 RED = significantly lower than 2011

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

- More than half (56%) of Pacific Power and nearly two thirds (69%) of Rocky Mountain Power Ad Non-Aware customers are “very satisfied” with their utility company.
- Pacific Power saw a significant decrease in “very satisfied” ratings this year (56% vs. 68% 2011).

Ad Non-Aware: Advertisements' Impact on Company Satisfaction	2009		2010		2011		2012	
	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)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Very satisfied (8-10 ratings)	65%	69%	63%	64%	68%	76%	56%	69%
Moderately satisfied (5-7 ratings)	27%	26%	27%	28%	21%	15%	27%	27%
Not satisfied (0-4 ratings)	6%	4%	11%	6%	9%	8%	13%	4%

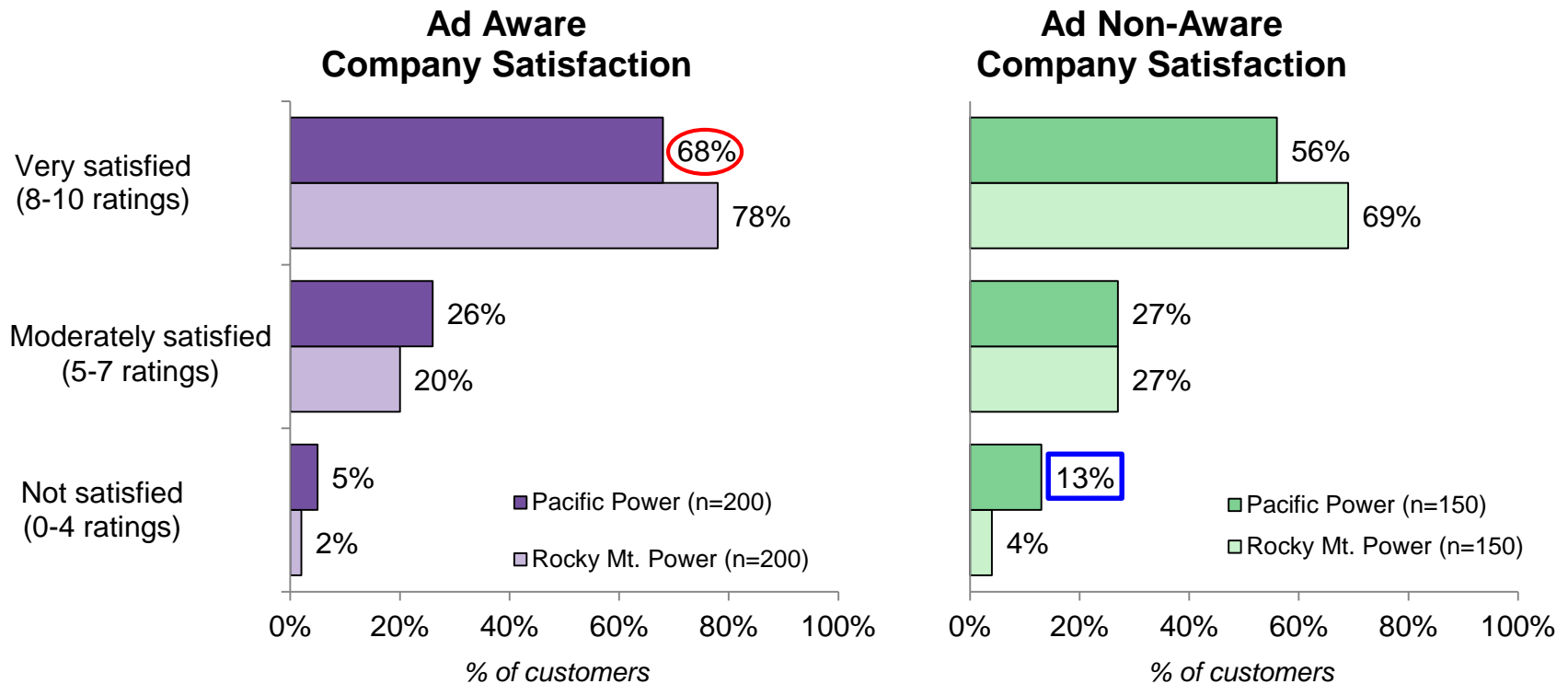
BLUE = significantly higher than 2011

RED = significantly lower than 2011

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 – 2012

- Overall, Rocky Mountain Power customers are more likely to be “very satisfied” with their utility than Pacific Power customers.
 - Pacific Power Ad Non-Aware customers are significantly less likely than Ad Aware customers to be “very satisfied” (56% vs. 68%).



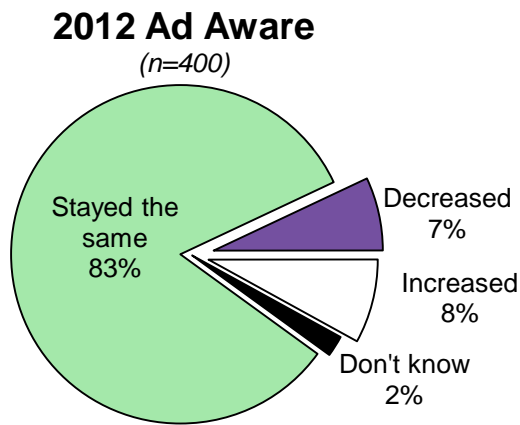
Q16 Now I'm going to ask some questions about your satisfaction with UTILITY. First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

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

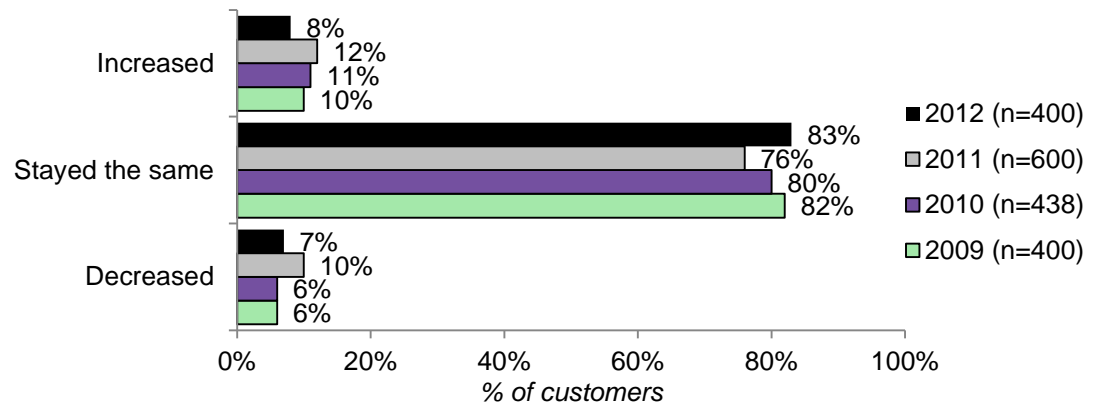
Satisfaction Comparison With Previous Years

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.



Satisfaction With Utility Compared to Last Year



Why has your satisfaction increased?	2012
	(n=31)
Billing services/assistance	30%
Good reliable electrical service	29%
Quality of customer service	25%
Efforts toward energy conservation	10%
Keeping people informed	7%
Decreased rates/usage	5%
Other	23%

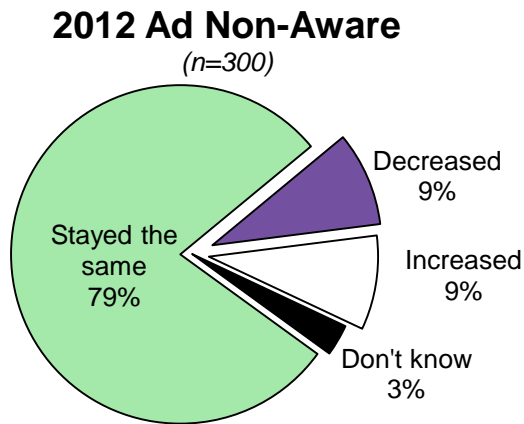
Why has your satisfaction decreased?	2012
	(n=28)*
Increased cost/rates	39%
Poor service	26%
Many service interruptions	14%
Installation of smart meters	10%
Keeping people informed	7%
Quality of customer service	4%
Other	29%

Q17/Q18 Compared to a year ago, has your satisfaction with UTILITY increased, stayed the same or decreased? *CAUTION: small sample sizes.

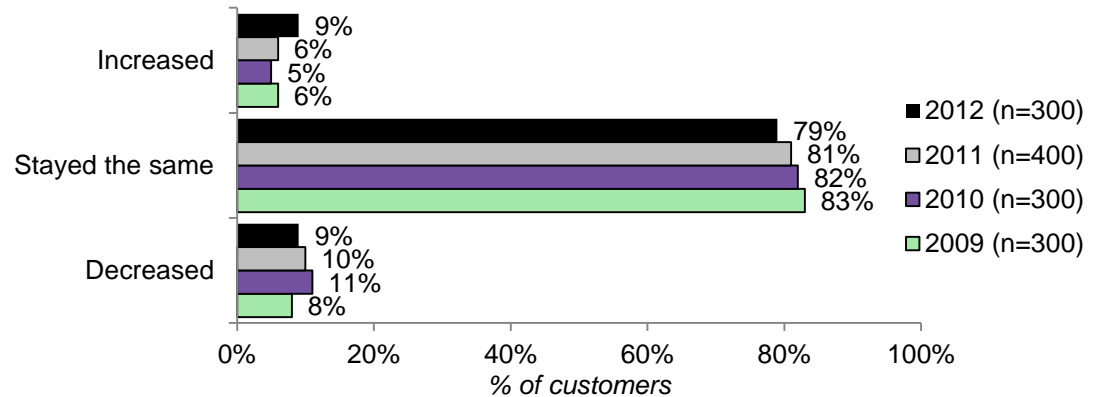
Satisfaction Comparison With Previous Years

Ad Non-Aware

- Ad Non-Aware customers' satisfaction with their utility company remains consistent with the previous year's findings.



Satisfaction With Utility Compared to Last Year

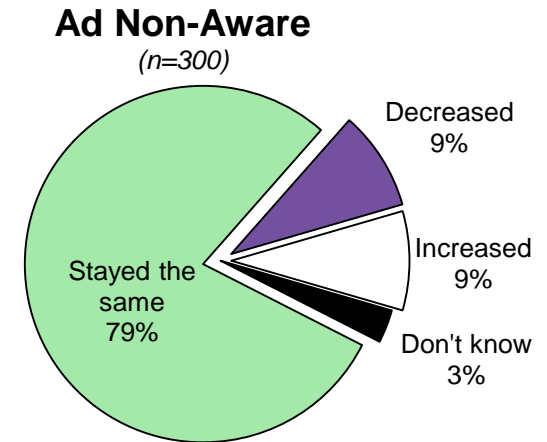
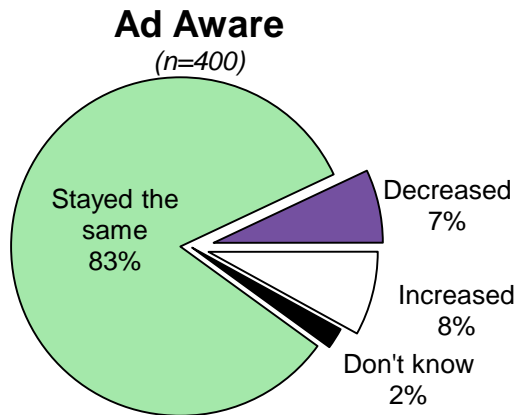


Why has your satisfaction increased?	2012
	(n=26)*
Good reliable service	22%
Billing services/assistance	18%
Quality of customer service	15%
Lower rates/affordable price	12%
Decreased rates/usage	3%
Quick at restoring power	3%
Other	12%

Why has your satisfaction decreased?	2012
	(n=27)*
Increased cost/rates	72%
Installation of smart meters	10%
Billing services/assistance	10%
Poor service	7%
Quality of customer service	7%
Many service interruptions	6%
Other	11%

Satisfaction Comparison Between Ad Aware and Ad Non-Aware 2012

- Company satisfaction has remained unchanged for most customers.
 - No significant differences exist between Ad Aware and Non-Aware customers.



Why has your satisfaction increased?	Ad Aware (n=31)*	Ad Non-Aware (n=26)*
Billing services/assistance	30%	18%
Good reliable service	29%	22%
Quality of customer service	25%	15%
Efforts toward energy conservation	10%	0%
Lower rates/affordable price	0%	12%
Decreased rates/usage	5%	3%
Other	%	%

Why has your satisfaction decreased?	Ad Aware (n=28)*	Ad Non-Aware (n=27)*
Increased cost/rates	39%	72%
Poor service	26%	7%
Many service interruptions	14%	6%
Installation of smart meters	10%	10%
Billing services/assistance	4%	10%
Quality of customer service	4%	7%
Other	%	%

*CAUTION: small sample sizes.

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

26% = significantly higher than Ad Non-Aware customers
72% = significantly higher than Ad Aware customers



Company Image Evaluation

- Overall, customers' perceptions of their utility company have remained largely consistent. However, two significant declines since 2011 are noted:
 - Ad Aware customers are less likely to strongly agree their utility is committed to keeping customers safe around electricity (70% 2012 vs. 76% 2011)
 - Ad Non-Aware customers are less likely to strongly agree their utility provides them with information and resources to help use energy wisely (46% 2012 vs. 54% 2011)
- 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
 - Has programs that help protect the environment
 - Has programs to help customers save money
 - Provides electricity at a reasonable price
- Ad Aware customers** are more likely to be "moderately satisfied" than Ad Non-Aware customers, and are less likely to say they "don't know" how the company performs.
- 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 2009-2012

- In 2012, Ad Aware customers are significantly less likely to strongly agree their utility is committed to keeping customers safe around electricity (70% vs. 76%).
- Ad Non-Aware customers are significantly less likely to strongly agree their utility provides them with information and resources to help use energy wisely (2012: 46% vs. 2011: 54%).

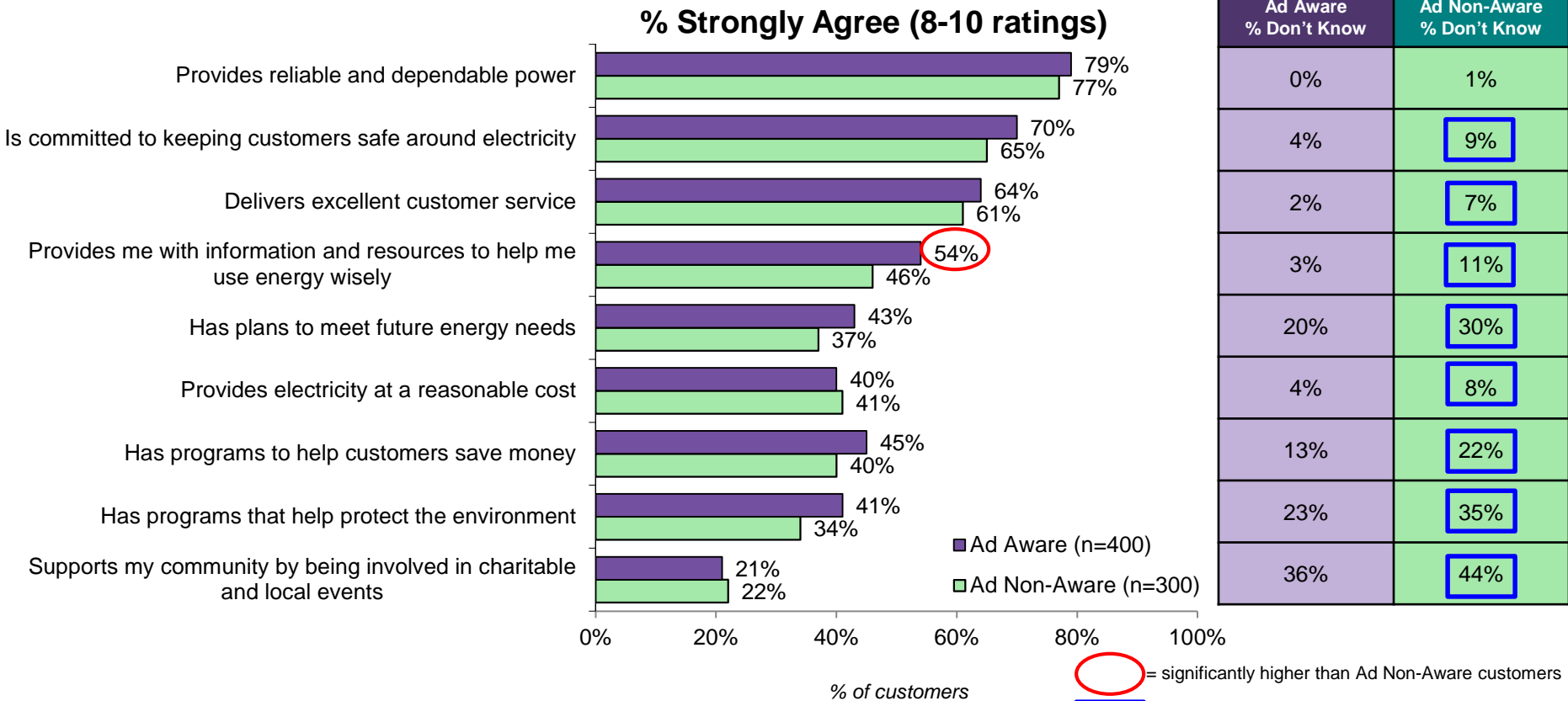
Company Image Attributes (% "strongly agree" 8-10 ratings)	2009		2010		2011		2012	
	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware
	(n=400)	(n=300)	(n=438)	(n=300)	(n=600)	(n=400)	(n=400)	(n=300)
Provides reliable and dependable power	85%	80%	81%	72%	77%	80%	79%	77%
Is committed to keeping customers safe around electricity	72%	67%	74%	66%	76%	69%	70%	65%
Delivers excellent customer service	64%	62%	65%	58%	66%	66%	64%	61%
Provides me with information and resources to help me use energy wisely	55%	55%	57%	52%	56%	54%	54%	46%
Has plans to meet future energy needs	48%	38%	51%	42%	47%	38%	43%	37%
Provides electricity at a reasonable cost	46%	44%	48%	40%	41%	41%	40%	41%
Has programs to help customers save money	46%	41%	47%	35%	49%	44%	45%	40%
Has programs that help protect the environment	42%	38%	41%	34%	42%	34%	41%	34%
Supports my community by being involved in charitable and local events	24%	19%	27%	19%	25%	21%	21%	22%

BLUE = significantly higher than 2011
RED = significantly lower than 2011

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 2012

- Ad Aware customers are significantly more likely than Ad Non-Aware customers to agree their utility provides them with information to use energy wisely.
- 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 2012

(by Utility & Ad Awareness)

- There are no significant differences between utilities regarding those that strongly agree to the image evaluation questions.

Company Image Attributes (% “strongly agree” 8-10 ratings)	Ad Aware		Ad Non-Aware	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Provides reliable and dependable power	78%	80%	77%	78%
Is committed to keeping customers safe around electricity	71%	69%	63%	67%
Delivers excellent customer service	62%	66%	58%	63%
Provides me with information and resources to help me use energy wisely	54%	54%	46%	47%
Has plans to meet future energy needs	42%	44%	33%	40%
Provides electricity at a reasonable cost	34%	44%	29%	49%
Has programs to help customers save money	44%	46%	43%	37%
Has programs that help protect the environment	43%	40%	37%	33%
Supports my community by being involved in charitable and local events	24%	20%	21%	23%

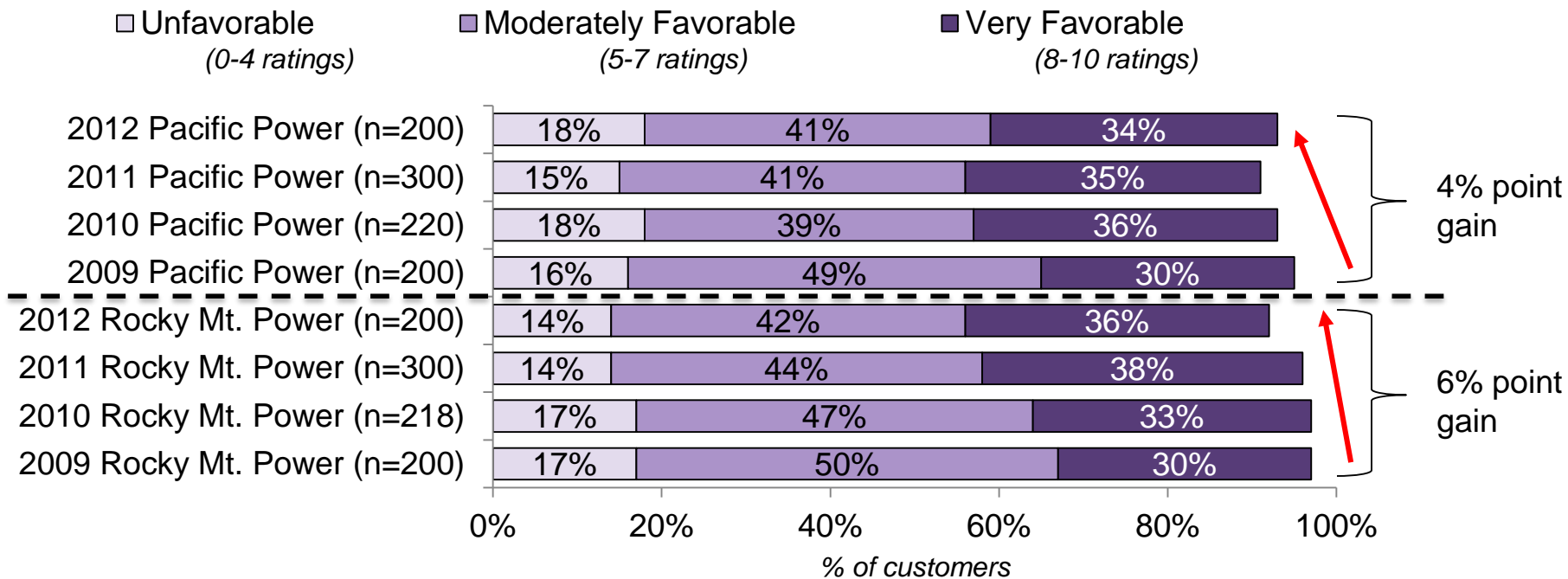
Q19 Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

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

Advertisements' Impact on Company Image 2009-2012

- One third (35%) of Ad Aware customers say that the ads have “very favorably” affected their opinion of their electric utility, while less than one fifth (16%) 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 2012

Very Favorable (8-10 rating) (n=140)		Moderately Favorable (5-7 rating) (n=166)		Least Favorable (0-4 rating) (n=63)	
34%	Utility has positive practices/operation (32% - 2011, 47% - 2010, 49% - 2009)	25%	Rarely see advertisement/do not affect me/not useful/not necessary (35% - 2011, 34% - 2010, 34% - 2009)	38%	Rarely see advertisement/do not affect me/not useful/not necessary (40% - 2011, 39% - 2010, 70% - 2009)
20%	Information is useful to energy habits/usage (16% - 2011, 10% - 2010, 25% - 2009)	21%	Neutral feeling towards them (20% - 2011)	16%	Limited choice in utility provider/monopoly (18% - 2011, 20% - 2010, 20% - 2009)
8%	Advertisements serve as education to consumers (31% - 2011, 19% - 2010, 29% - 2009)	10%	Limited choice in utility provider/monopoly (7% - 2011, 14% - 2010, 11% - 2009)	13%	Utility has poor practices/inefficient (15% - 2011, 11% - 2010)
7%	Information on energy savings/bill minimizing practices (8% - 2011, 9% - 2010, 15% - 2009)	8%	Information is useful to energy habits/usage (4% - 2011, 5% - 2010)	9%	Misleading/fluctuating costs (8% - 2011, 13% - 2010, 14% - 2009)
6%	Commercials are good (1% - 2011)	6%	Information given was already common knowledge	9%	Neutral feeling towards them
6%	Rarely see advertisement/do not affect me/not useful/not necessary (5% - 2011)	5%	Utility has positive business practices/operation (9% - 2011, 21% - 2010, 20% - 2009)	8%	Wasteful spending (1% - 2011)

There are no statistical differences between Pacific Power and Rocky Mountain Power.

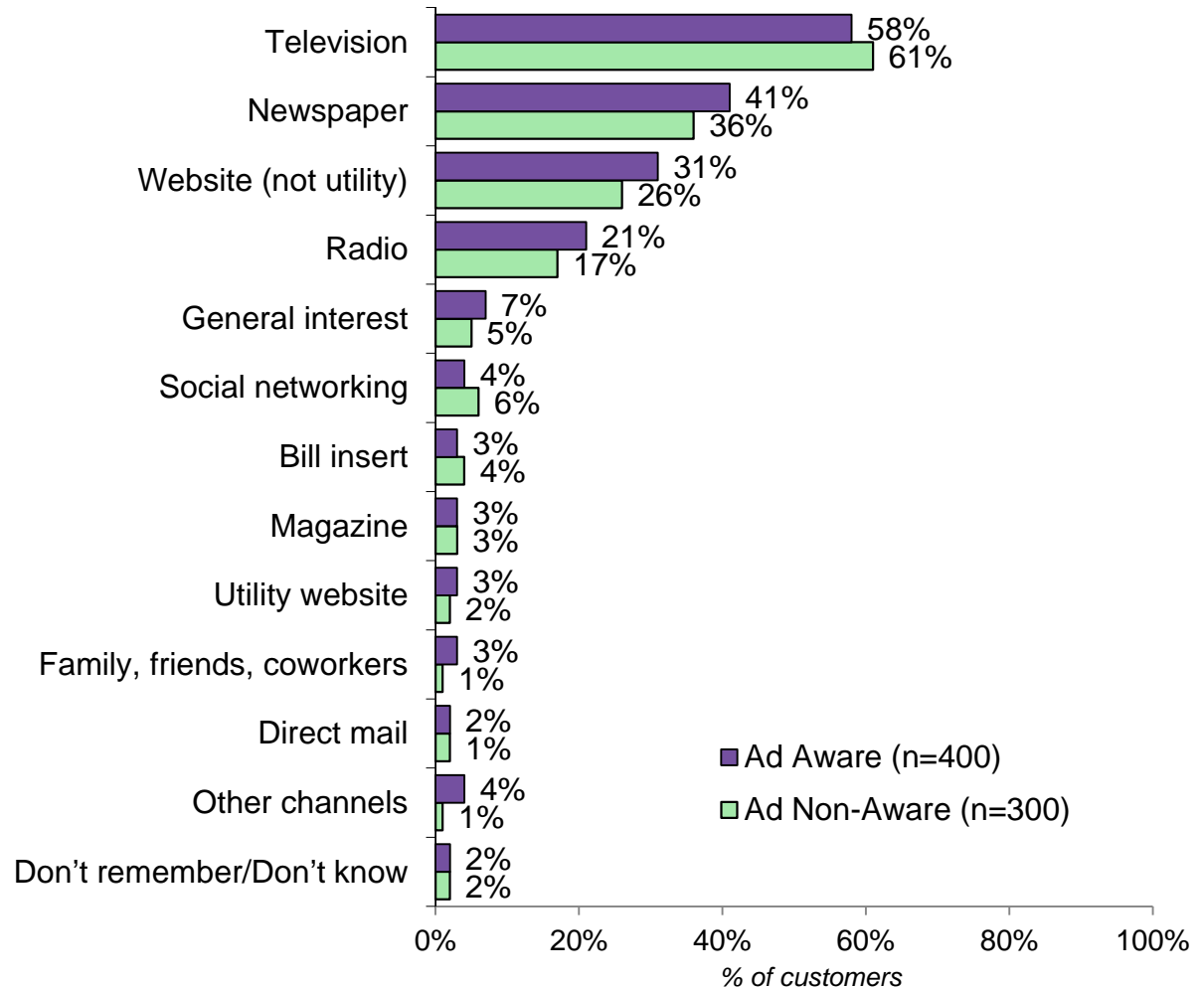


Communication Sources

News & Current Event Sources 2012

- Television, newspapers and non-utility websites are the primary sources for news and current events.
- 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) (48% vs. 23%).
- No significant differences exist between Ad Aware and Non-Aware customers in 2012.

News & Current Event Channels



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

News & Current Event Sources 2009-2012

- Sources of news and current events are consistent with previous years; television and newspapers remain the primary sources, followed by websites (non-utility) and radio.
 - Ad Aware customers mention television as a source significantly less than they did in 2011 (58% vs. 67%).
 - Ad Non-Aware customers mention websites (non-utility) as a source significantly less than 2011 (26% vs. 33%).

News & Current Event Sources	2009		2010		2011		2012	
	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)	Ad Aware (n=400)	Ad Non-Aware (n=300)
Television	68%	68%	64%	62%	67%	57%	58%	61%
Newspaper	52%	41%	48%	38%	43%	30%	41%	36%
Website (not utility)	30%	27%	30%	27%	32%	33%	31%	26%
Radio	25%	18%	21%	15%	18%	13%	21%	17%
General internet	n/a	n/a	3%	4%	7%	6%	7%	5%
Social networking	3%	1%	4%	2%	4%	3%	4%	6%
Bill insert	3%	2%	2%	1%	2%	3%	3%	4%
Magazine	5%	2%	2%	2%	3%	1%	3%	3%
Utility website	3%	2%	3%	2%	2%	2%	3%	2%
Family, friends, coworkers	2%	5%	3%	4%	1%	1%	3%	1%
Direct mail	3%	3%	3%	3%	<1%	1%	2%	2%
Don't remember/Don't know	1%	4%	1%	6%	1%	5%	2%	2%

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

BLUE = significantly higher than 2011
RED = significantly lower than 2011

Utility Information Sources 2009-2012

- Sources of utility information remain consistent with the previous year, with bill inserts, television, utility websites and direct mail being the primary sources.
 - Ad Aware customers rely on direct mail for information about their utility significantly more than in 2011 (17% vs. 11%), and utilize television significantly less (19% vs. 30%).

Utility Information Sources	2009		2010		2011		2012	
	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)	Ad Aware (n=400)	Ad Non-Aware (n=300)
Bill insert	42%	42%	38%	40%	41%	34%	38%	35%
Television	24%	11%	27%	13%	30%	11%	19%	14%
Website (Pacific Power/Rocky Mt. Power)	12%	9%	12%	6%	20%	18%	18%	13%
Direct mail	19%	16%	15%	12%	11%	12%	17%	11%
Newspaper	18%	11%	18%	10%	14%	9%	8%	9%
Website (not utility)	4%	3%	6%	4%	6%	4%	6%	8%
Radio	6%	2%	5%	3%	7%	2%	7%	3%
Call customer service	3%	3%	1%	1%	2%	3%	3%	3%
Family, friends, coworkers	2%	2%	2%	4%	1%	1%	2%	1%
Don't remember/Don't know	8%	18%	9%	22%	8%	20%	7%	11%

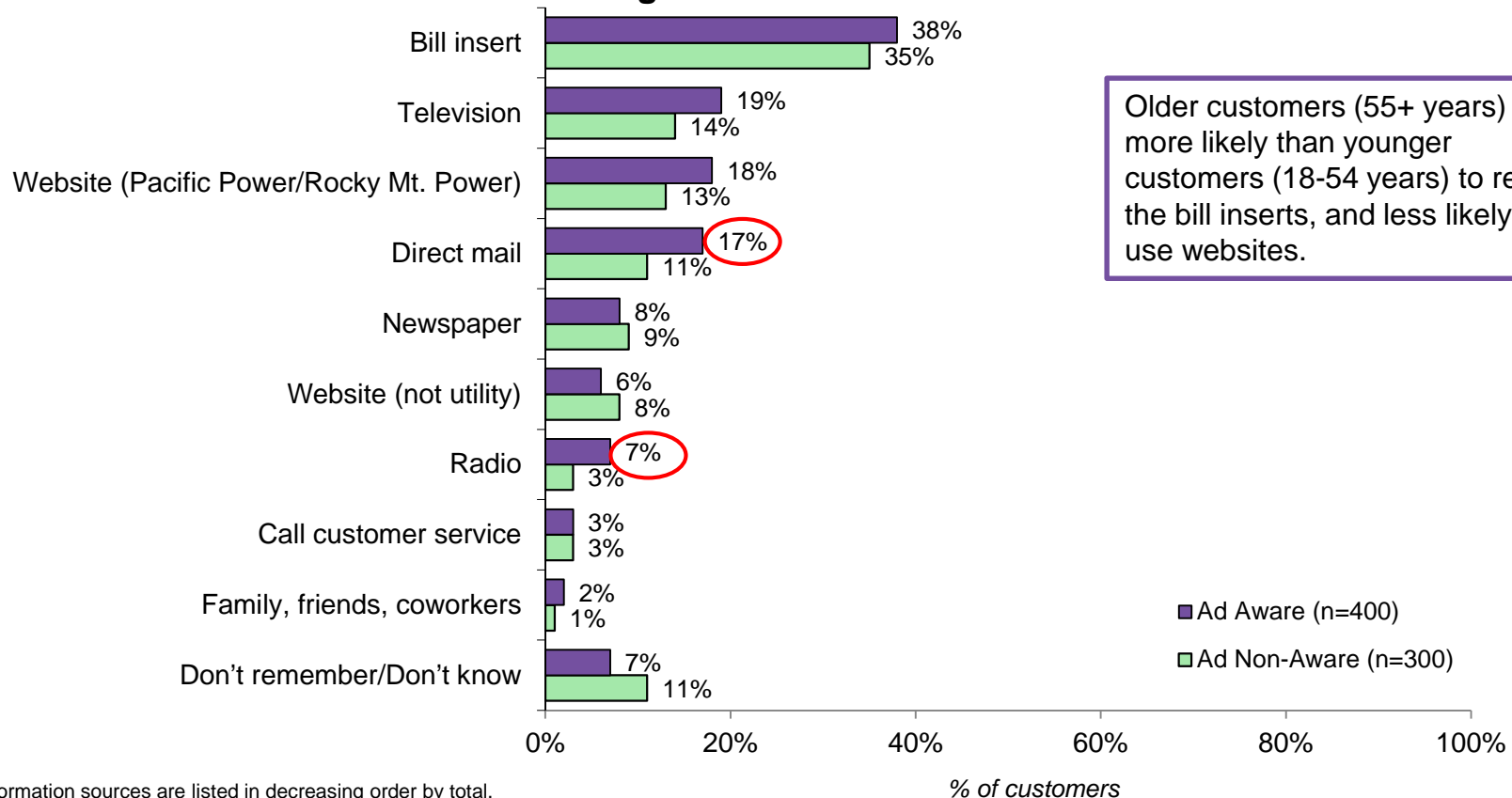
Q21 What sources do you typically rely on for information about UTILITY?

BLUE = significantly higher than 2011
RED = significantly lower than 2011

Utility Information Sources 2012

- Bill inserts remain the primary source for utility information.
- Ad Aware customers are more likely to utilize *direct mail* and *radio* as sources for information about their utility (17% vs. 11% and 7% vs. 3%, respectively).

Advertising & Communication Channels



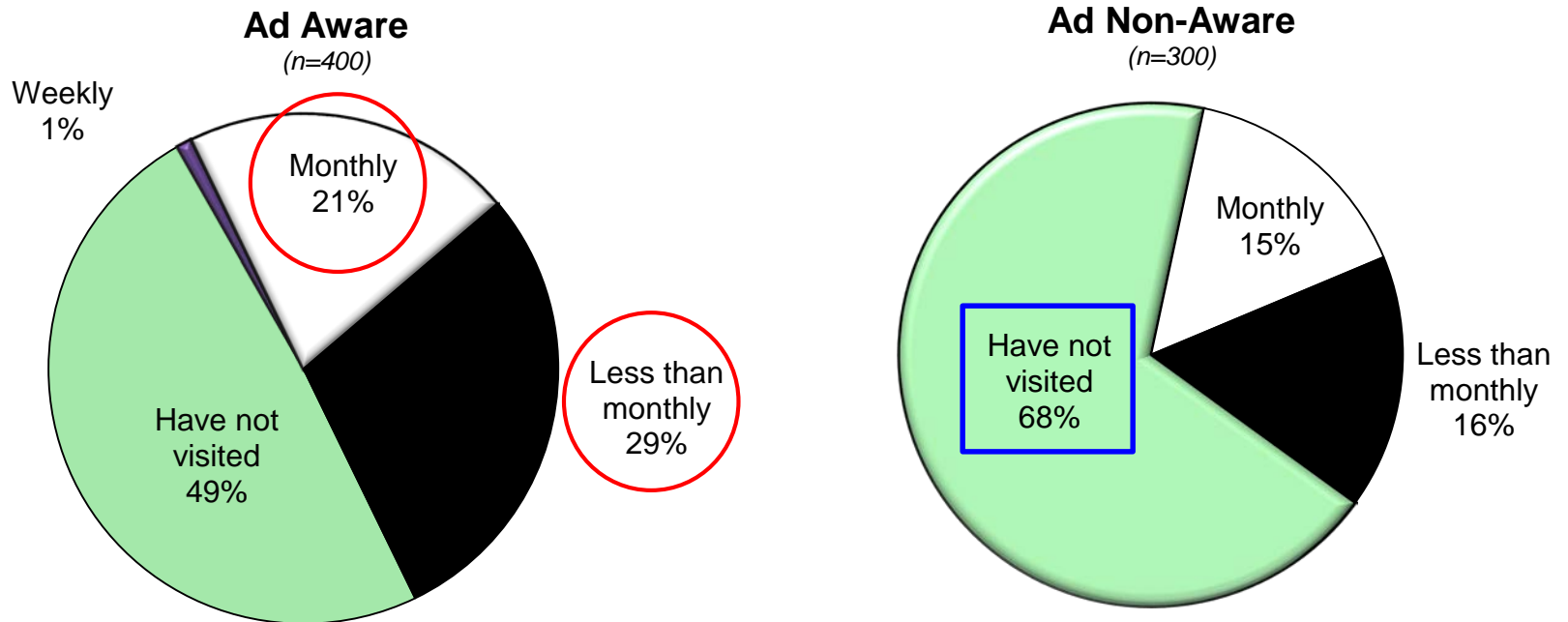
Older customers (55+ years) are more likely than younger customers (18-54 years) to rely on the bill inserts, and less likely to use websites.

*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

- Half (51%) of Ad Aware, and one third (31%) of Ad Non-Aware customers have visited their electric utility's website, consistent with 2011 figures (47% and 38% respectively).
- Of those who have visited their utility's website, more than half (54%) visit *less than monthly*.



 = significantly higher than Ad Non-Aware customers

 = significantly higher than Ad Aware customers

Q22/Q23 Have you ever visited the UTILITY website? How often do you visit UTILITY website?



Energy Efficiency Programs

Energy Efficiency Awareness 2012

- Consistent with 2011, 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 Oregon and Washington (37% aware vs. 29% and 24% respectively).

EE Awareness	Oregon		Washington		California		Utah		Wyoming		Idaho	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
	(n=200)	(n=266)	(n=150)	(n=62)	(n=150)	(n=22)*	(n=200)	(n=277)	(n=150)	(n=200)	(n=150)	(n=26)*
Yes	32%	29%	35%	24%	32%	23%	42%	37%	30%	22%	32%	38%
No	64%	66%	63%	68%	65%	73%	54%	57%	67%	76%	65%	62%
Don't remember/Don't know	4%	6%	2%	8%	3%	5%	4%	5%	3%	3%	3%	0%

*CAUTION: small sample sizes.

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 2012

- Of those who are aware of Energy Efficiency Programs, Rocky Mountain Power customers continue to be more likely to be able to name a program, unaided.

Program Recall	Oregon		Washington		California		Utah		Wyoming		Idaho	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
	(n=200)	(n=266)	(n=150)	(n=62)	(n=150)	(n=22)*	(n=200)	(n=277)	(n=150)	(n=200)	(n=150)	(n=26)*
Cool Keeper	0%	5%	1%	3%	0%	9%	13%	7%	1%	6%	1%	4%
Home Energy Savings	4%	5%	4%	2%	5%	5%	6%	3%	7%	1%	6%	0%
See Ya Later, Refrigerator	1%	4%	7%	5%	5%	5%	9%	3%	10%	3%	5%	4%
Wattsmart	1%	3%	5%	0%	2%	9%	6%	3%	5%	3%	5%	0%
Low Income Weatherization	4%	2%	2%	3%	4%	9%	2%	3%	2%	1%	1%	0%
Home Energy Analysis	2%	2%	1%	5%	2%	5%	4%	7%	3%	5%	2%	4%
Cool Cash Incentive	1%	2%	1%	0%	1%	5%	1%	2%	1%	1%	3%	8%
Energy Star New Homes	4%	2%	3%	0%	3%	5%	4%	13%	1%	1%	1%	0%
Time of Day	1%	2%	1%	2%	0%	5%	0%	5%	0%	4%	8%	8%
Powerforward	1%	1%	1%	0%	1%	5%	1%	0%	1%	1%	0%	4%
Blue Sky	2%	1%	0%	0%	1%	0%	1%	1%	0%	1%	1%	0%
None	77%	80%	67%	82%	71%	82%	53%	69%	66%	83%	61%	69%

Total EE Program Recall 2012

- 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 show significantly higher awareness of the "See Ya Later, Refrigerator" program than all other states.

Program Recall	Oregon		Washington		California		Utah		Wyoming		Idaho	
	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012	2011	2012
	(n=200)	(n=266)	(n=150)	(n=62)	(n=150)	(n=22)*	(n=200)	(n=277)	(n=150)	(n=200)	(n=150)	(n=26)*
Cool Keeper	n/a	n/a	n/a	n/a	n/a	n/a	59%	60%	n/a	n/a	n/a	n/a
See Ya Later, Refrigerator	35%	35%	81%	74%	55%	64%	78%	74%	57%	46%	52%	38%
Home Energy Savings	53%	46%	61%	66%	59%	68%	66%	61%	51%	46%	57%	46%
Wattsmart	41%	48%	51%	53%	47%	55%	59%	54%	45%	37%	45%	27%
Energy Star New Homes	n/a	n/a	n/a	n/a	n/a	n/a	46%	44%	n/a	n/a	n/a	n/a
Cool Cash Incentive	n/a	n/a	n/a	n/a	n/a	n/a	41%	41%	n/a	n/a	n/a	n/a
Low Income Weatherization	43%	43%	47%	39%	53%	64%	27%	26%	35%	29%	37%	35%

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 2012

- Consistent with 2011, half of all respondents from Oregon have heard of the Energy Trust of Oregon.
 - Of these respondents, half (48%) 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	
	2011 (n=200)	2012 (n=266)
Yes	52%	54%
No	46%	43%
Don't remember/Don't know	2%	3%



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	
	2011 (n=103)	2012 (n=143)
Yes	47%	48%
No	51%	50%
Don't remember/Don't know	2%	3%

OR1 Have you ever heard of the Energy Trust of Oregon?



OR2 Are you aware that Pacific Power and the Energy Trust of Oregon work together as partners on energy efficiency programs for Oregon Utility customers?



2012 Demographics

Demographics

Customer Tenure	Ad Aware		Ad Non-Aware	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
1-4 years	27%	23%	19%	21%
5-9 years	12%	15%	15%	15%
10-14 years	12%	13%	9%	11%
15-19 years	6%	11%	8%	9%
20-24 years	9%	9%	7%	9%
25-29 years	6%	4%	7%	3%
30-39 years	12%	10%	13%	13%
40-49 years	10%	10%	11%	8%
50+ years	8%	5%	11%	10%

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

Demographics

Age	Ad Aware		Ad Non-Aware	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
18-34	20%	29%	20%	23%
35-54	24%	31%	25%	29%
55+	54%	40%	53%	46%
Refused	3%	0%	2%	2%



Income	Ad Aware		Ad Non-Aware	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Less than \$15,000	17%	9%	15%	8%
\$15-\$30,000	16%	14%	17%	13%
\$30-\$50,000	22%	18%	21%	25%
\$50-\$75,000	16%	21%	17%	16%
\$75-\$100,000	8%	12%	8%	13%
Over \$100,000	7%	16%	3%	12%
Don't know	<1%	1%	5%	5%
Refused	14%	9%	15%	8%

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

Demographics

Education	Ad Aware		Ad Non-Aware	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Less than high school	6%	4%	7%	5%
High school graduate	24%	20%	31%	24%
Some college	26%	28%	25%	25%
Undergraduate college degree	16%	20%	12%	15%
Some graduate school	5%	6%	4%	4%
Completed graduate school	18%	19%	12%	19%
Trade or technical school graduate	3%	3%	5%	5%
Don't know	0%	0%	1%	0%
Refused	2%	0%	2%	3%

Gender	Ad Aware		Ad Non-Aware	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Male	47%	54%	50%	57%
Female	53%	46%	50%	43%

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