



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 fifth wave, conducted in May 2013.

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 20, and June 2, 2013. All participants were interviewed by Market Decisions’ in-house Research Associates.
 - A list of 50,000 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 +/-5.7% 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, and is mostly consistent with 2012 figures.
 - Ad Aware Rocky Mountain Power customers are significantly less likely to be aware in 2013 compared to 2012 (84% vs. 92%).
- Reported advertising/communication awareness is consistent with last year for both Pacific Power and Rocky Mountain Power.
 - Pacific Power Aware: 63% 2009, 57% 2010, 50% 2011, 58% 2012, and 58% 2013.
 - Rocky Mountain Power: 67% 2009, 66% 2010, 58% 2011, 57% 2012 and 61% 2013.
- Rocky Mountain Power Ad Aware customers indicate they were exposed to significantly more advertisements, on average, (13) compared Pacific Power Ad Aware customers (9).
 - 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 (33% Pacific Power; 34% 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.”
 - Ad Aware customers remain significantly more likely to be satisfied with their utility company than those Ad Non-Aware; satisfaction has increased among Pacific Power Ad Non-Aware customers from 2012 to 2013 (56% 2012 vs. 70% 2013).
- The most frequently recalled messages remain using energy wisely, and energy efficiency programs.
 - Recall of programs such as equal pay/customer guarantees, and preparing for power outages have decreased 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 32% vs. Pacific Power 19% and Ad Aware 32% vs. 18% Ad Non-Aware.
- Recall of “Being Wattsmart” remains higher among Ad Aware and Rocky Mountain Power customers.
 - “Being Wattsmart” – Ad Aware 70% vs. 33% Ad Non-Aware; Rocky Mountain Power 60% vs. Pacific Power 46%.
- Three in ten (32%) customers report having taken action based on the advertisement or communication seen from the company. The response is consistent between utility companies.
 - Pacific Power: 31%; Rocky Mountain Power: 32%
 - 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.
 - Ad Non-Aware customers are more likely to use Websites than Newspapers for news and current events.
- Roughly one third (36%) of customers are aware that Pacific Power/Rocky Mountain Power offer energy efficiency programs.
 - Washington’s awareness increased from 24% to 44% from 2012 to 2013.

2009-2013: Ad Aware Customers

Ad Aware Customers Differences 2009-2013	2009	2010	2011	2012	2013
% very satisfied overall with company	79%	73%	72%	74%	72%
Company awareness (aided + unaided): Pacific Power	90%	87%	96%	89%	89%
Company awareness (aided + unaided): Rocky Mountain Power	90%	87%	91%	92%	84%
Unaided company awareness: Pacific Power	77%	77%	90%	81%	76%
Unaided company awareness: Rocky Mountain Power	66%	70%	73%	73%	65%
% who are very favorable toward UTILITY as a result of ad/communications	30%	34%	36%	35%	33%
% who see, hear or read UTILITY advertisements via TV	40%	61%	60%	47%	56%
% who see, hear or read UTILITY advertisements via bill inserts	37%	19%	25%	31%	31%
% who see, hear or read UTILITY advertisements via direct mail	18%	10%	11%	17%	20%
% who recall message of renewable or alternative energy (unaided)	21%	13%	16%	8%	9%
% who strongly agree messages are informative	51%	47%	51%	54%	45%
% who recall “Let’s Turn the Answers On”	23%	33%	44%	35%	32%
% who recall “Being Wattsmart”	n/a	n/a	65%	66%	70%
% who took action based on advertisement	27%	26%	31%	30%	32%

BLUE = significantly higher than 2012

RED = significantly lower than 2012

2009-2013 : Ad Non-Aware Customers

Ad Non-Aware Customers Differences 2009-2013	2009	2010	2011	2012	2013
Company awareness (aided + unaided): Pacific Power	72%	66%	88%	84%	86%
Company awareness (aided + unaided): Rocky Mountain Power	74%	62%	90%	83%	80%
Unaided company awareness: Pacific Power	62%	55%	79%	73%	73%
Unaided company awareness: Rocky Mountain Power	51%	44%	77%	66%	62%
% who rely on TV for news and current events	68%	62%	57%	61%	52%

BLUE = significantly higher than 2012
 RED = significantly lower than 2012



Ad Aware vs. Ad Non-Aware Customers

2013 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% very satisfied overall with company	72%	64%
% who mentioned their electric utility top-of-mind unaided: Pacific Power	78%	73%
% who mentioned their electric utility unaided: Pacific Power	89%	86%
% recall "Let's Turn the Answers On"	32%	18%
% recall "Being Wattsmart"	70%	33%
% who say that their satisfaction with the <i>UTILITY</i> has increased over the past year	10%	4%
% who strongly agree <i>UTILITY</i> is committed to keeping customers safe around electricity	71%	68%
% who strongly agree <i>UTILITY</i> has plans to meet future energy needs	47%	36%
% who strongly agree <i>UTILITY</i> has programs that help protect the environment	41%	30%
% who strongly agree <i>UTILITY</i> provides reliable and dependable power: Rocky Mountain Power	82%	81%

RED = significant difference



Ad Aware vs. Ad Non-Aware Customers

2013 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	56%	52%
% who typically rely on newspaper as a source for information about news and current events	38%	27%
% who typically rely on radio as a source for information about news and current events	26%	20%
% who typically rely on bill inserts as a source for information about <i>UTILITY</i>	31%	31%
% who typically rely on television as a source for information about <i>UTILITY</i>	15%	9%
% who typically rely on newspaper as a source for information about <i>UTILITY</i>	12%	6%

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 2010-2013

- Top of mind awareness for both Pacific Power and Rocky Mountain Power remains high.
 - 2013 top of mind awareness remained consistent with 2012 levels.

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%

2013 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=239)	Rocky Mt. Power (n=267)	Pacific Power (n=170)	Rocky Mt. Power (n=163)
Pacific Power/PPL	78%	1%	73%	4%
Rocky Mountain Power/Utah Power	--	67%	1%	62%

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

BLUE = significantly higher than 2012
RED = significantly lower than 2012

Top of Mind Unaided Company Awareness 2013

- Three quarters (78%) of Pacific Power Ad Aware customers and two thirds (67%) of Rocky Mountain Power Ad Aware customers mentioned their electric utilities first.
- Among those Ad Non-Aware, three quarters of Pacific Power customers (73%) and two thirds of Rocky Mountain Power customers (62%) mention their utility first.

2013 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=239)	Rocky Mt. Power (n=267)	Pacific Power (n=170)	Rocky Mt. Power (n=163)
Pacific Power/PPL	78%	1%	73%	4%
Rocky Mountain Power/Utah Power	0%	67%	1%	62%
Pacific Gas & Electric/PG&E	7%	2%	7%	1%
Portland General/PGE	4%	0%	4%	1%
NW Natural	3%	0%	4%	0%
Avista	3%	0%	1%	0%
PacifiCorp	<1%	1%	1%	1%
Mountain Fuel/Questar	0%	20%	0%	21%
Other	6%	7%	9%	11%
None	0%	<1%	<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?

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

Total Unaided Company Awareness 2010 - 2013

- Total awareness decreased significantly in 2013 among Rocky Mountain Power Ad Aware customers when compared to 2012 (84% vs. 92%).

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%	%
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%
2013 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=239)</i>	Rocky Mt. Power <i>(n=267)</i>	Pacific Power <i>(n=170)</i>	Rocky Mt. Power <i>(n=163)</i>
Pacific Power/PPL	89%	1%	86%	5%
Rocky Mountain Power/Utah Power	0%	84%	1%	80%

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

BLUE = significantly higher than 2012

RED = significantly lower than 2012

Total Unaided Company Awareness 2013

- Ad Aware and Ad Non-Aware customers show high awareness of their respective utilities.

2012 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=239)	Rocky Mt. Power (n=267)	Pacific Power (n=170)	Rocky Mt. Power (n=163)
Pacific Power/PPL	89%	1%	86%	5%
Rocky Mountain Power/Utah Power	0%	84%	1%	80%
Pacific Gas & Electric/PG&E	12%	4%	9%	1%
NW Natural	11%	0%	16%	0%
Avista	11%	0%	6%	0%
Portland General/PGE	7%	<1%	8%	1%
Cascade	9%	0%	7%	0%
Mountain Fuel/Questar	<1%	55%	0%	43%
Other	21%	21%	18%	22%

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

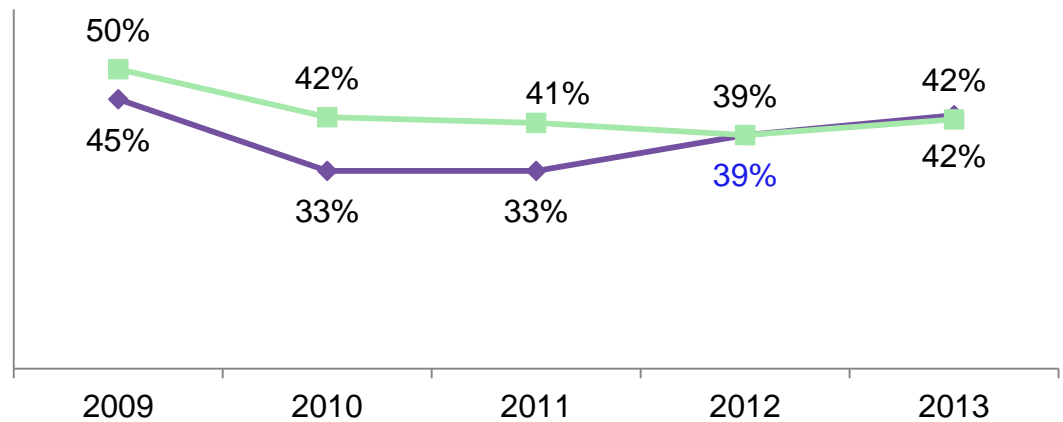
 = significantly higher than Ad Non-Aware customers
 = significantly higher than Ad Aware customers

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

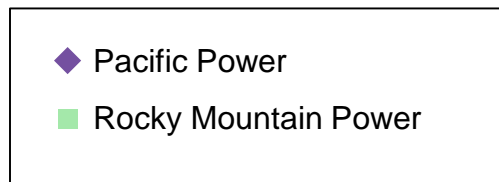
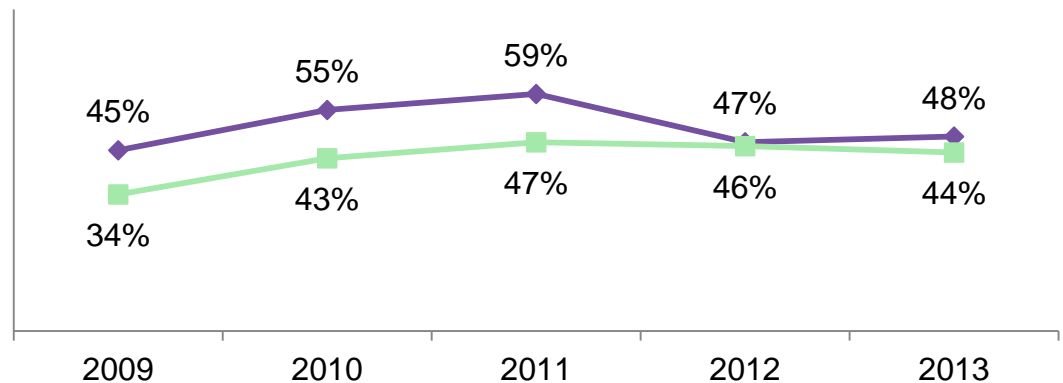
Unaided Advertisement Awareness 2009-2013

- 2013 levels of unaided advertising or communications awareness among Rocky Mountain Power and Pacific Power customers are in line with figures seen in 2012.

% Unaided Utility Communication Awareness



% Unaided Not Aware of Any Utility Communications



BLUE = significantly higher than 2012
RED = significantly lower than 2012

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 2013

- Two fifths of Pacific Power (42%) and Rocky Mountain Power (42%) customers recall an advertisement or communication from their electric company during the past six months (unaided).
- One fourth of Rocky Mountain Power (27%) customers have unaided recall of Mountain Fuel/Questar advertisements.

2013 Unaided Ad Awareness	Pacific Power (n=409)	Rocky Mt. Power (n=430)
Pacific Power/PPL	42%	1%
NW Natural	7%	<1%
Pacific Gas & Electric/PG&E	4%	<1%
Avista	3%	0%
Portland General/PGE	2%	0%
PacifiCorp	1%	1%
Mountain Fuel/Questar	<1%	27%
Rocky Mountain Power/Utah Power	<1%	42%
Other	5%	7%
None	48%	44%

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

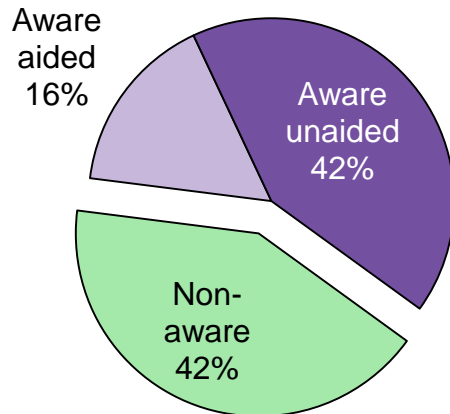
Q3 *During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?*

Total Advertisement Awareness

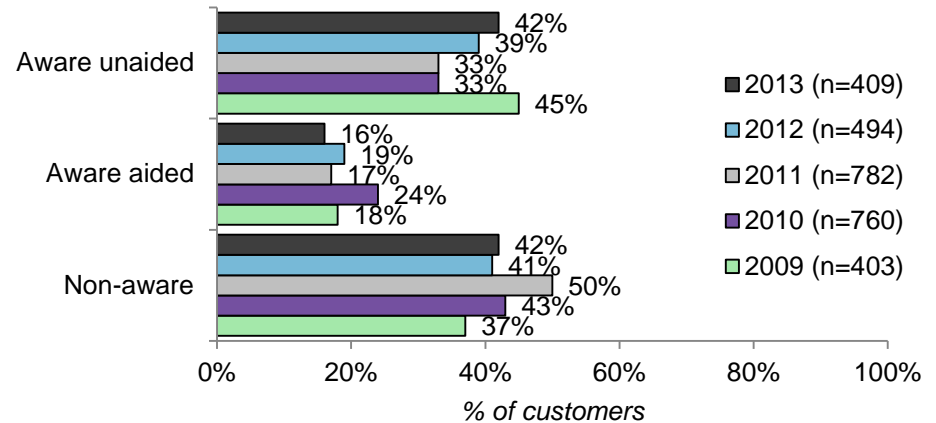
Pacific Power

- 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, consistent with 2012 awareness (58%), and an increase from 2011 awareness (50%).

2013 Pacific Power
(n=409)



Advertisement Awareness



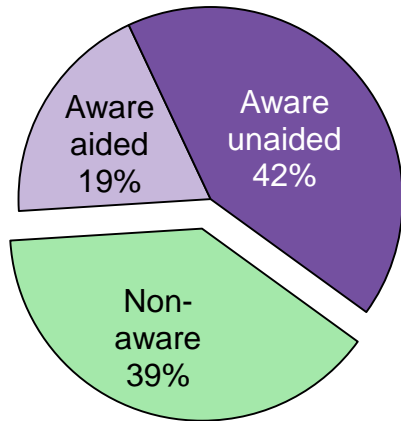
Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

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

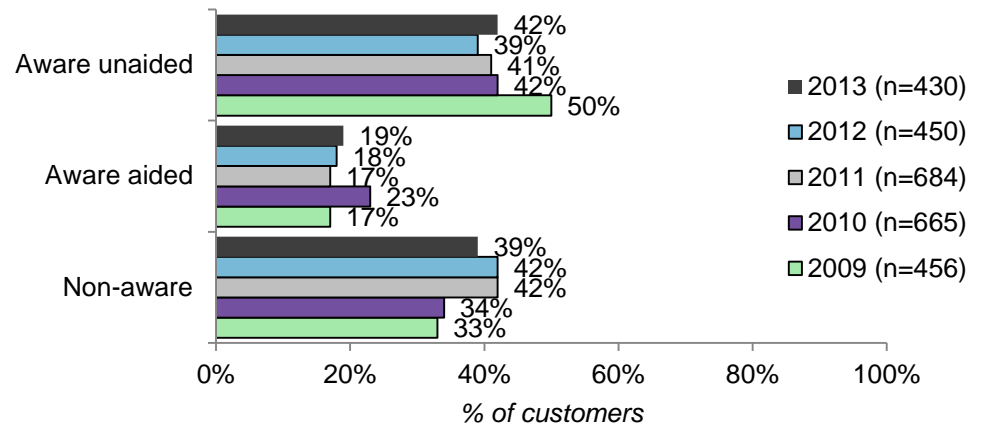
Total Advertisement Awareness Rocky Mountain Power

- In total, 61% of Rocky Mountain Power customers are aware of the company's advertisements or communications, consistent with 2012 awareness.

2012 Rocky Mountain Power
(n=430)



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?

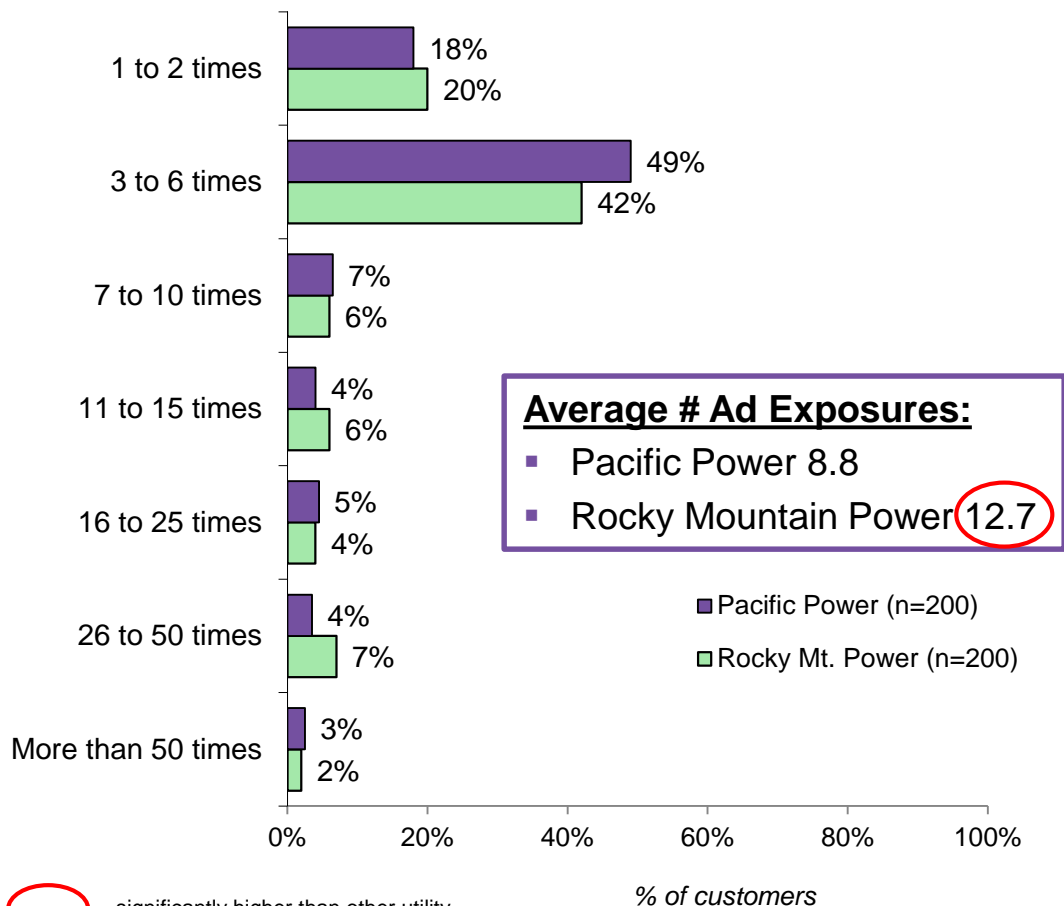


Advertising & Communication Recall

- 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

2013 Number of Recalled Advertising Exposures



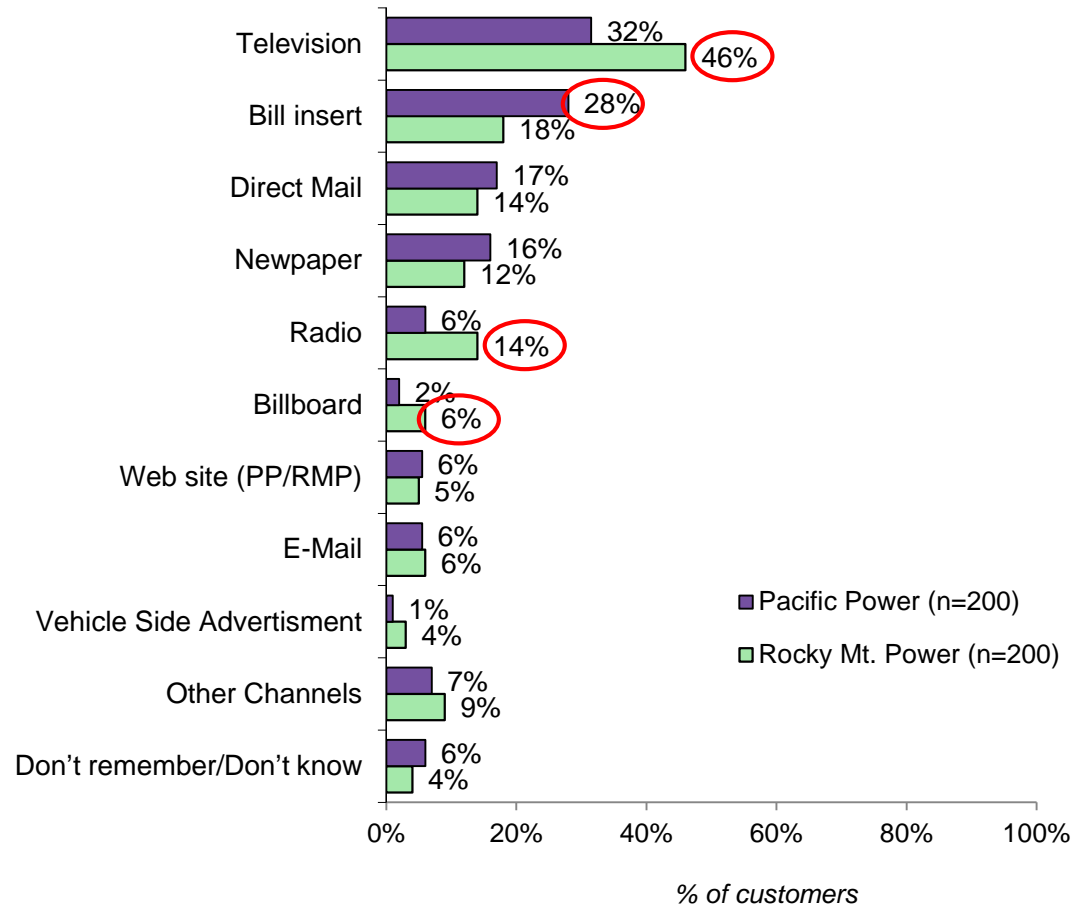
- The average number of advertising exposures recalled is significantly higher among Rocky Mountain Power customers.
- Advertising exposures remained consistent from 2012 to 2013.

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

Advertising & Communication Channels 2013

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

2013 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 2009-2013

- Among Rocky Mountain Power customers, *Television* decreased significantly as an advertising channel between 2012 and 2013.
- Bill inserts* decreased significantly as an advertising channel among Pacific Power Customers.

Advertising & Communication Channels	2009		2010		2011		2012		2013	
	Pacific Power	Rocky Mt. Power	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)	(n=200)	(n=200)
Television	34%	44%	49%	69%	53%	65%	30%	58%	32%	46%
Bill insert	42%	34%	24%	15%	33%	18%	39%	24%	28%	18%
Newspaper	21%	18%	27%	23%	18%	28%	18%	14%	16%	12%
Radio	6%	8%	5%	16%	8%	15%	6%	10%	6%	14%
Direct mail	19%	18%	11%	10%	14%	10%	20%	14%	17%	14%
Billboard	2%	4%	2%	4%	3%	4%	4%	10%	2%	6%
Website (PP/RMP)	< 1%	6%	5%	5%	3%	4%	3%	4%	6%	5%
Magazine	2%	2%	2%	0%	1%	1%	3%	<1%	2%	2%
Other channels	4%	5%	2%	4%	3%	6%	11%	11%	12%	15%
Don't remember/Don't know	4%	2%	8%	5%	2%	3%	4%	4%	6%	4%

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

BLUE = significantly higher than 2012

RED = significantly lower than 2012

Unaided & Aided Message Recall 2013

- 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 + aided), and “billing or energy assistance” (unaided + aided).
- Rocky Mountain Power customers are significantly more likely to recall messages with content about using energy wisely” (unaided + aided), and “Being Wattsmart” (unaided + aided) 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%	45%	57%	18%	50%	68%
Energy efficiency programs ← Second highest aided recall	21%	34%	54%	22%	41%	63%
Being Wattsmart	2%	34%	36%	6%	60%	66%
Renewable or alternative energy	16%	43%	59%	4%	38%	42%
Billing or energy assistance	4%	40%	44%	2%	29%	31%
Electrical safety	4%	28%	32%	8%	28%	36%
Preparing for power outages	1%	29%	30%	1%	34%	35%
Working to keep your power on	<1%	22%	23%	<1%	30%	31%
Programs such as equal pay/customer guarantees	4%	20%	24%	1%	28%	29%
Planning for your future energy needs	2%	27%	29%	1%	23%	24%
Transmission line projects	<1%	8%	9%	<1%	12%	13%
Environment friendly	3%	n/a	3%	1%	n/a	1%
Don't remember/Don't know	30%	11%	41%	25%	8%	33%

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 2009-2013

Messages Recalled	Pacific Power									
	Unaided					Aided				
	2009 (n=200)	2010 (n=220)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2009 (n=200)	2010 (n=220)	2011 (n=300)	2012 (n=200)	2013 (n=200)
Renewable or alternative energy	28%	20%	22%	12%	16%	54%	41%	43%	38%	43%
Using energy wisely	14%	14%	15%	12%	12%	56%	49%	54%	48%	45%
Energy efficiency programs	19%	17%	19%	17%	21%	60%	50%	48%	40%	34%
Billing or energy assistance	n/a	7%	6%	12%	4%	n/a	35%	38%	36%	40%
Being Wattsmart	n/a	n/a	3%	4%	2%	n/a	n/a	28%	34%	34%
Electrical safety	10%	12%	9%	6%	4%	42%	38%	37%	32%	28%
Preparing for power outages	1%	1%	4%	1%	1%	42%	34%	35%	39%	29%
Planning for your future energy needs	1%	5%	3%	2%	2%	34%	26%	34%	21%	27%
Programs such as equal pay/customer guarantees	10%	4%	3%	1%	4%	31%	25%	28%	28%	20%
Working to keep your power on	3%	1%	5%	2%	<1%	27%	29%	37%	25%	22%
Transmission line projects	1%	4%	2%	2%	<1%	12%	10%	11%	10%	8%
Environment friendly	5%	2%	5%	2%	3%	n/a	n/a	n/a	n/a	n/a
Don't remember/Don't know	30%	36%	37%	33%	30%	4%	10%	5%	8%	11%

- Overall, the three communication messages cited most often by Pacific Power customers are:
 - Renewable or alternative energy
 - Using energy wisely
 - Energy efficiency programs
- Aided, “preparing for power outages” and “programs such as equal pay/customer guarantees” saw a significant decrease in recall from 2012.
- Unaided, “billing or energy assistance” saw a significant decrease from 2012, being consistent with 2010 and 2011.

BLUE = significantly higher than 2012
RED = significantly lower than 2012

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 2009-2013

Messages Recalled	Rocky Mt. Power									
	Unaided					Aided				
	2009 (n=200)	2010 (n=218)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2009 (n=200)	2010 (n=218)	2011 (n=300)	2012 (n=200)	2013 (n=200)
Using energy wisely	18%	21%	19%	20%	18%	50%	57%	59%	47%	50%
Energy efficiency programs	31%	26%	24%	18%	22%	52%	51%	51%	44%	41%
Renewable or alternative energy	16%	7%	13%	5%	4%	39%	44%	38%	36%	38%
Being Wattsmart	n/a	n/a	3%	4%	6%	n/a	n/a	62%	58%	60%
Working to keep your power on	4%	4%	4%	2%	1%	37%	36%	46%	32%	30%
Electrical safety	8%	9%	11%	8%	8%	36%	39%	31%	30%	28%
Billing or energy assistance	n/a	2%	5%	6%	2%	n/a	28%	30%	30%	29%
Programs such as equal pay/customer guarantees	9%	7%	2%	3%	1%	34%	29%	37%	30%	28%
Planning for your future energy needs	5%	3%	1%	<1%	1%	36%	32%	32%	28%	23%
Preparing for power outages	2%	2%	2%	4%	<1%	31%	26%	27%	32%	34%
Transmission line projects	2%	2%	2%	1%	<1%	20%	11%	18%	12%	12%
Environment friendly	<1%	2%	4%	1%	1%	n/a	n/a	n/a	n/a	n/a
Don't remember/Don't know	32%	33%	32%	36%	25%	5%	7%	2%	8%	8%

- Overall, the three communication messages cited most often by Rocky Mountain Power customers are:
 - Being Wattsmart
 - Using energy wisely
 - Energy efficiency programs
- Unaided, mention of “bill or energy assistance” is significantly lower than in 2012.

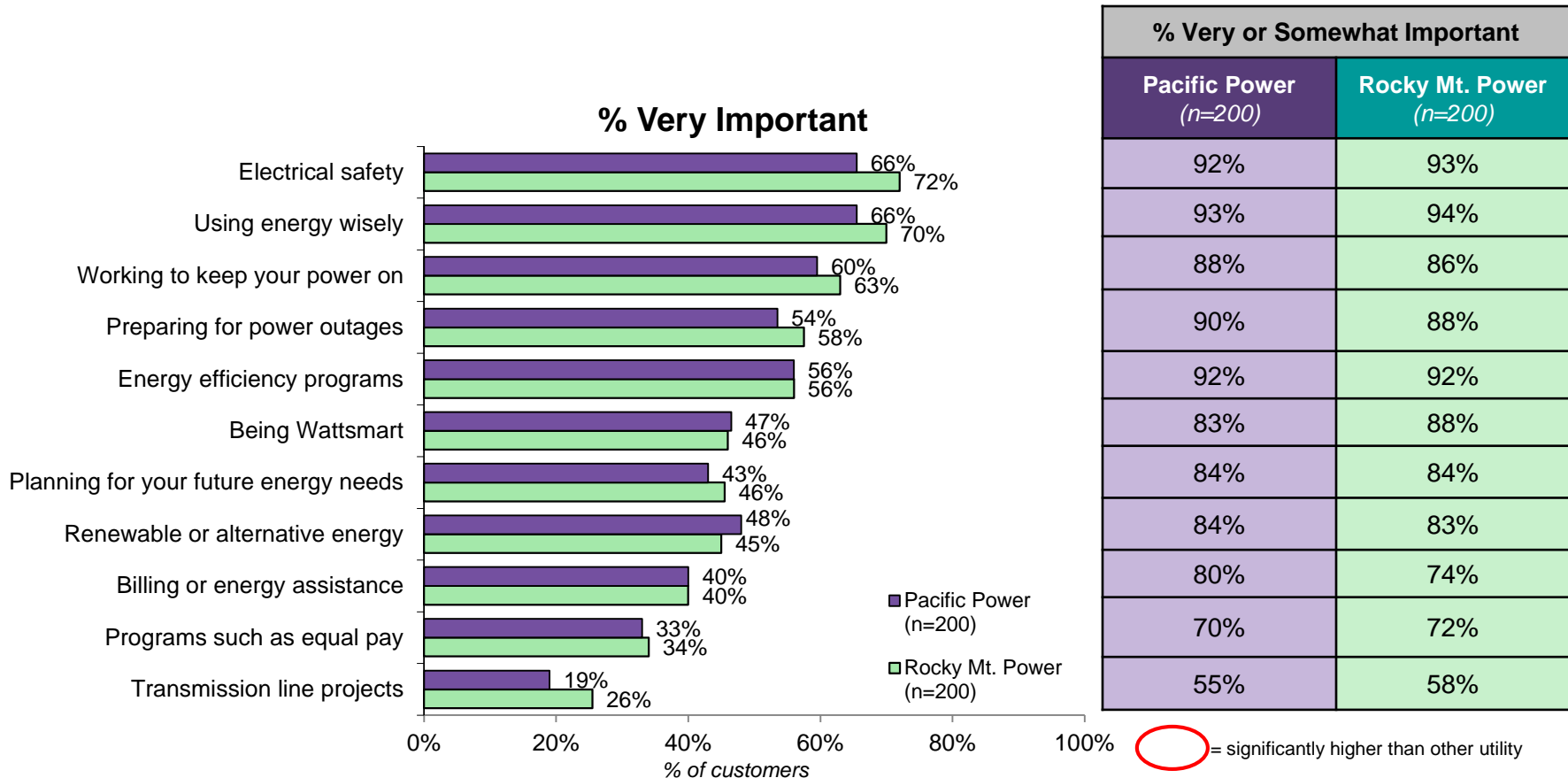
BLUE = significantly higher than 2012
RED = significantly lower than 2012

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 2013

- “Electrical safety” and “using energy wisely” remain the messages most important to 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 2009-2013

- Among Rocky Mountain Power customers, the percentage rating “billing or energy assistance” and “working to keep your power on” increased significantly between 2012 and 2013.
 - Among Pacific Power customers, “Billing or energy assistance” decreased significantly.
- The importance of “renewable or alternative energy” has declined every year from 2009 to 2013.

Advertising & Communication Channels (% “very important”)	2009		2010		2011		2012		2013	
	Pacific Power	Rocky Mt. Power	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)	(n=200)	(n=200)
Electrical safety	76%	76%	75%	73%	73%	70%	72%	66%	66%	72%
Using energy wisely	76%	70%	69%	67%	69%	66%	70%	66%	66%	70%
Energy efficiency programs	72%	64%	67%	58%	62%	58%	59%	58%	56%	56%
Preparing for power outages	55%	52%	60%	56%	55%	51%	62%	54%	54%	58%
Working to keep your power on	61%	62%	69%	60%	58%	58%	60%	52%	60%	63%
Renewable or alternative energy	64%	60%	60%	53%	54%	47%	52%	46%	48%	45%
Planning for your future energy needs	57%	52%	46%	48%	52%	45%	41%	46%	43%	46%
Billing or energy assistance	n/a	n/a	41%	33%	43%	32%	50%	26%	40%	40%
Programs such as equal pay/customer guarantees	34%	32%	32%	34%	37%	33%	34%	34%	33%	34%
Transmission line projects	24%	24%	27%	23%	27%	25%	24%	22%	19%	26%

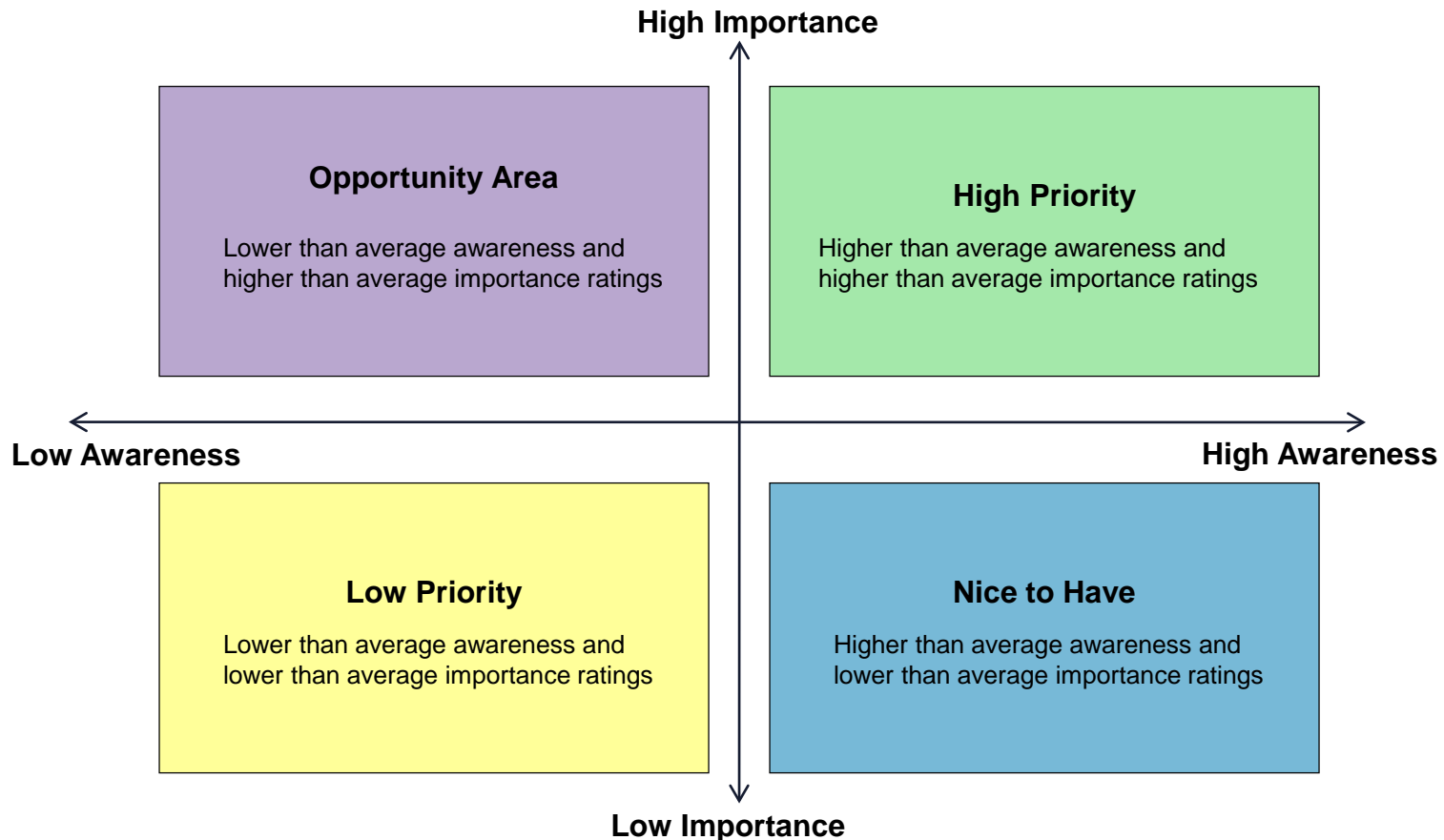
Q8 Do you think the following messages are very important, somewhat important, not very important or not at all important for UTILITY to communicate to customers like yourself?

BLUE = significantly higher than 2012

RED = significantly lower than 2012

Message Importance & Awareness Gap Analysis

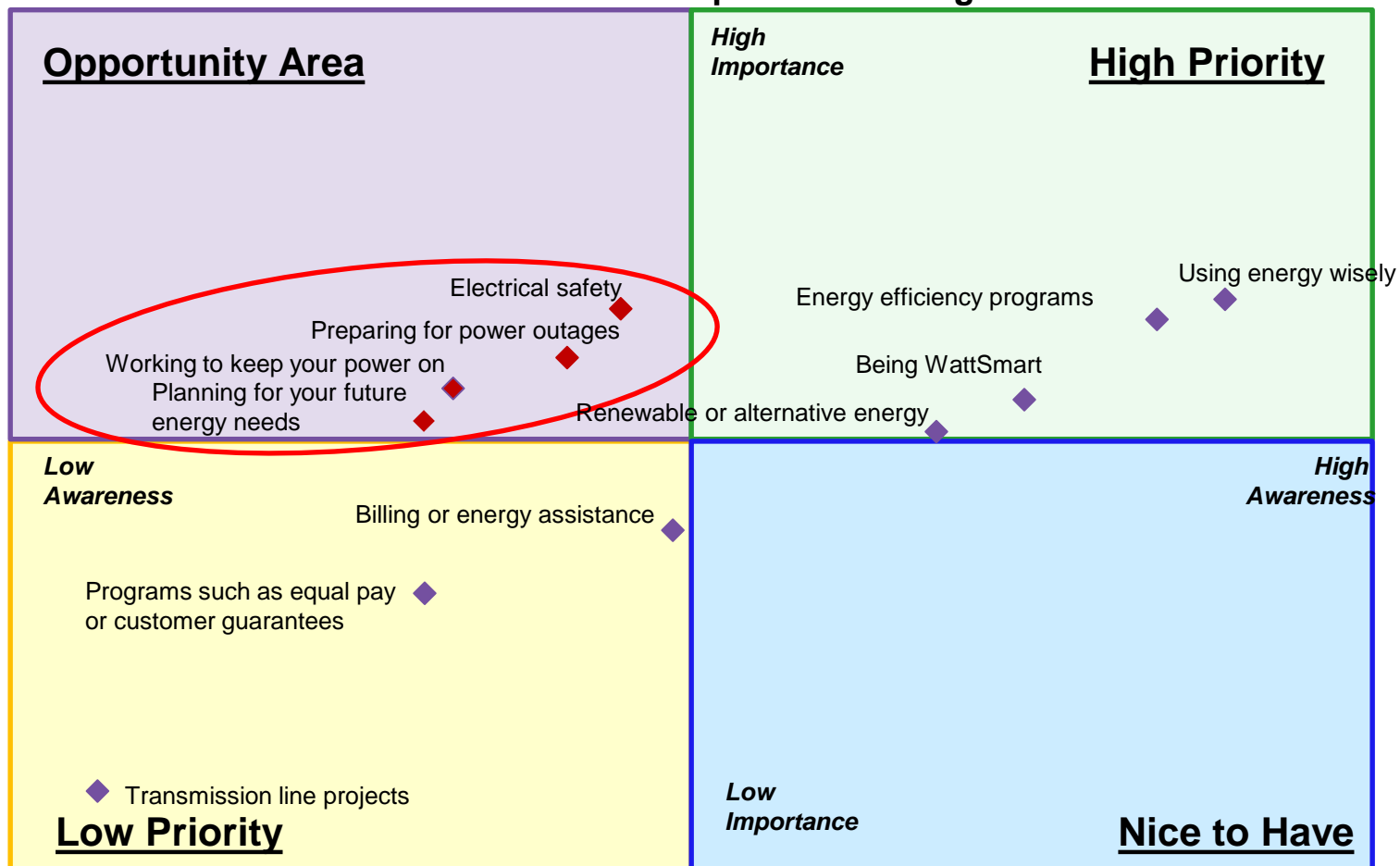
- The following slide presents a quadrant chart outlining the relative importance of each advertising message and the relative awareness of each message.
- Messages considered highly important, but with low awareness, indicate opportunity areas for Pacific Power and Rocky Mountain Power. Increasing awareness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



Message Awareness vs. Importance Ratings 2013

- Consistent with 2012, the messages “preparing for power outages,” “electrical safety,” and “working to keep your power on” have higher than average importance, but lower than average awareness, indicating an opportunity area to raise awareness.
 - In 2013, the message “planning for your future energy needs” moved into the opportunity quadrant.

2013 Awareness vs. Importance Ratings



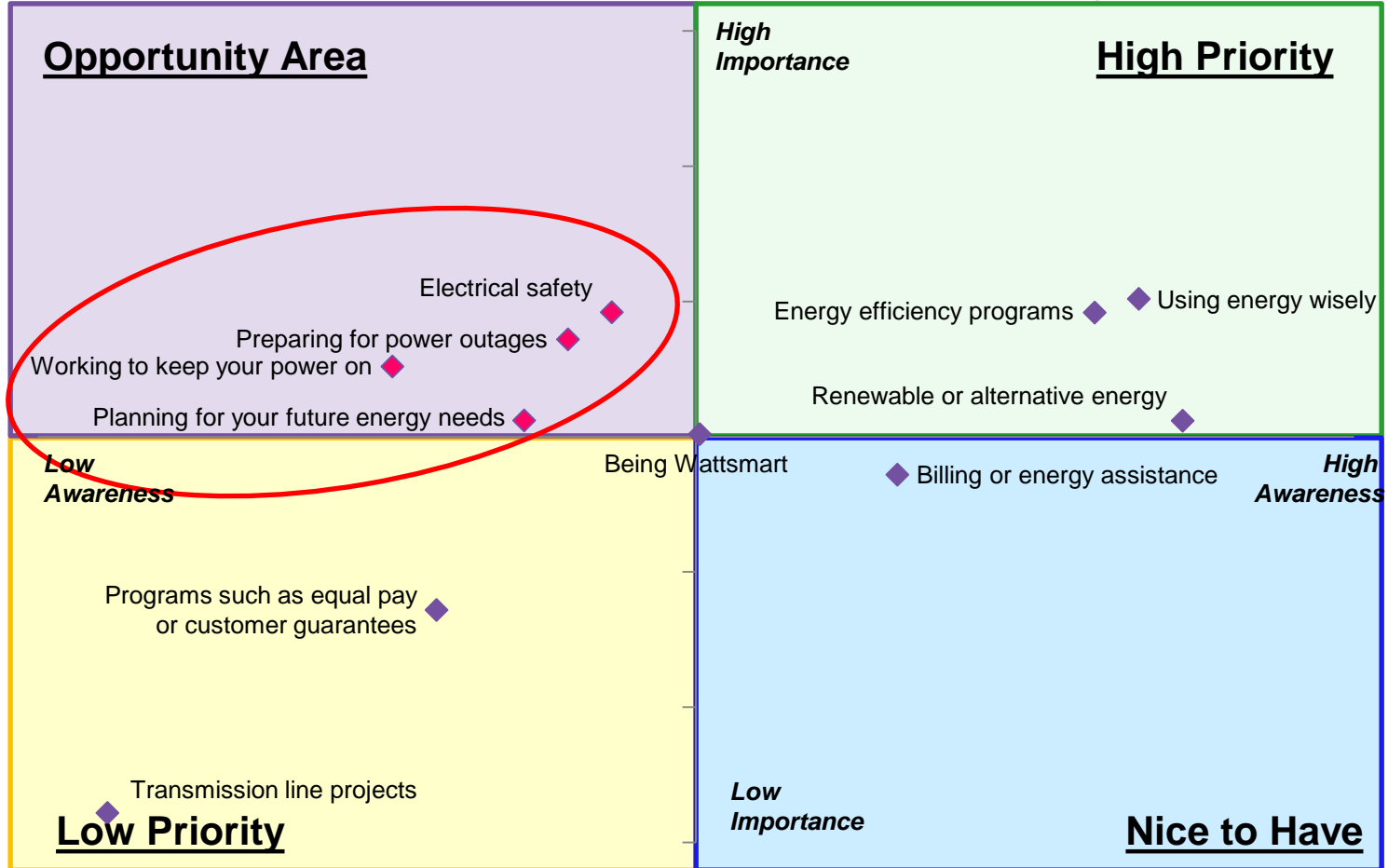


Message Awareness vs. Importance Ratings 2009-2013

	2009	2010	2011	2012	2013
Electrical safety	Opportunity Area	High Priority	Opportunity Area	Opportunity Area	Opportunity Area
Preparing for power outages	Low Priority	Opportunity Area	Opportunity Area	Opportunity Area	Opportunity Area
Working to keep your power on	Opportunity Area	Opportunity Area	Nice to Have	Opportunity Area	Opportunity Area
Planning for your future energy needs	Low Priority	Opportunity Area	Opportunity Area	Low Priority	Opportunity Area
Using energy wisely	High Priority	High Priority	High Priority	High Priority	High Priority
Energy efficiency programs	High Priority	High Priority	High Priority	High Priority	High Priority
Being Wattsmart	n/a	n/a	High Priority	High Priority	High Priority
Renewable or alternative energy	High Priority	High Priority	Nice to Have	High Priority	High Priority
Billing or energy assistance	n/a	Low Priority	Low Priority	Nice to Have	Low Priority
Programs such as equal pay or customer guarantees	Low Priority	Low Priority	Low Priority	Low Priority	Low Priority
Transmission line projects	Low Priority	Low Priority	Low Priority	Low Priority	Low Priority

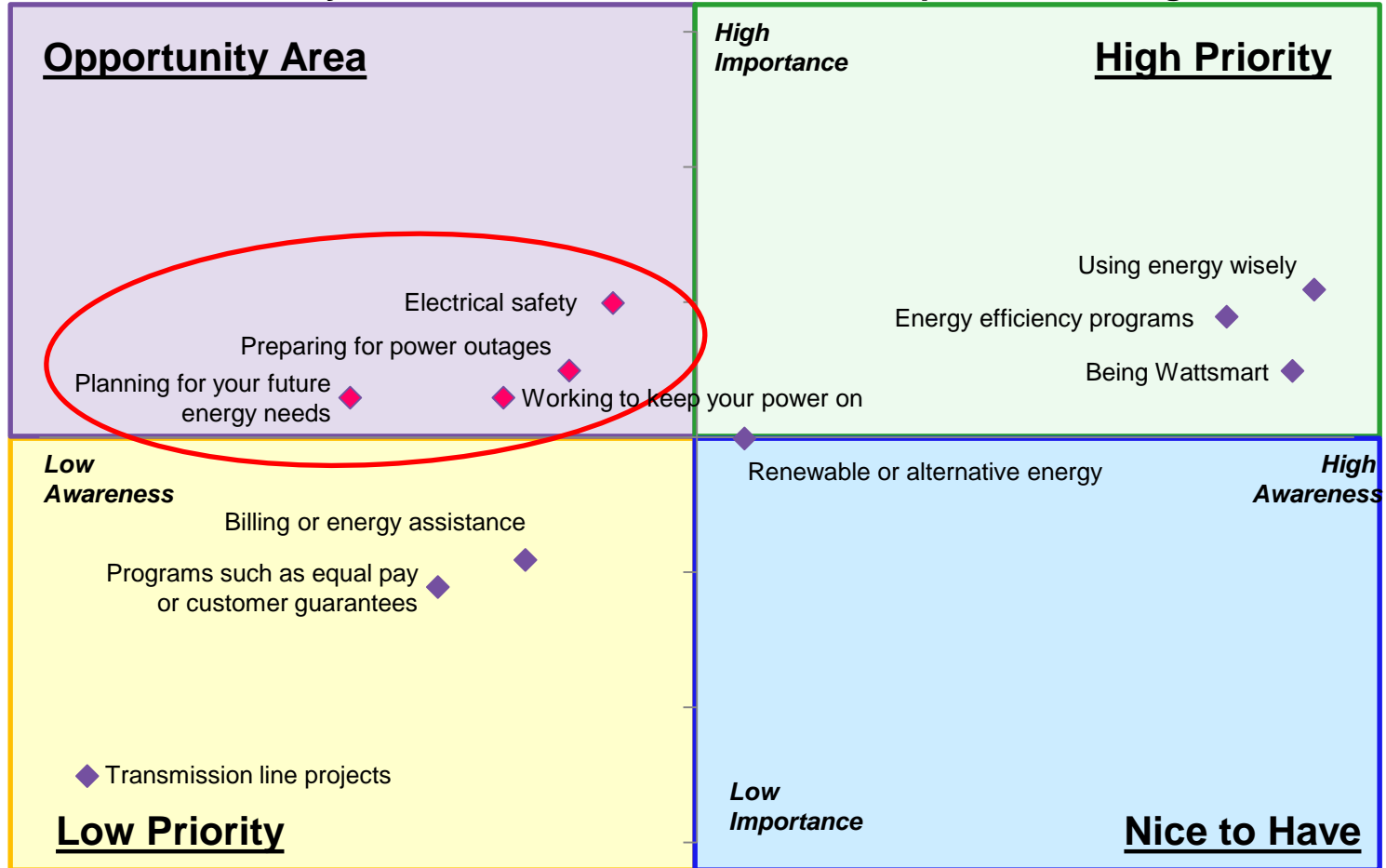
Message Awareness vs. Importance Ratings 2013 – PP

2013 Pacific Power Awareness vs. Importance Ratings



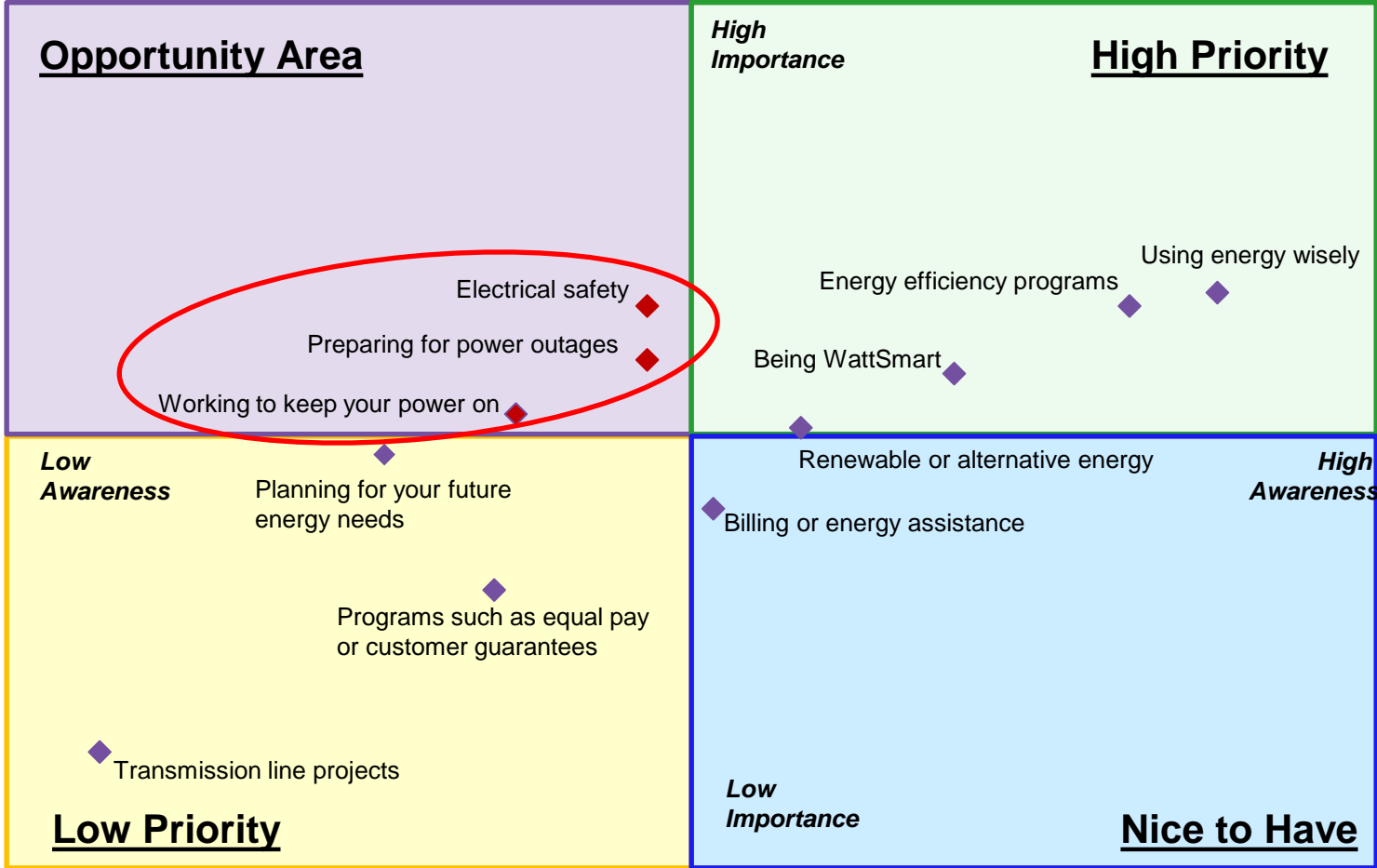
Message Awareness vs. Importance Ratings 2013 – RMP

2013 Rocky Mountain Power Awareness vs. Importance Ratings



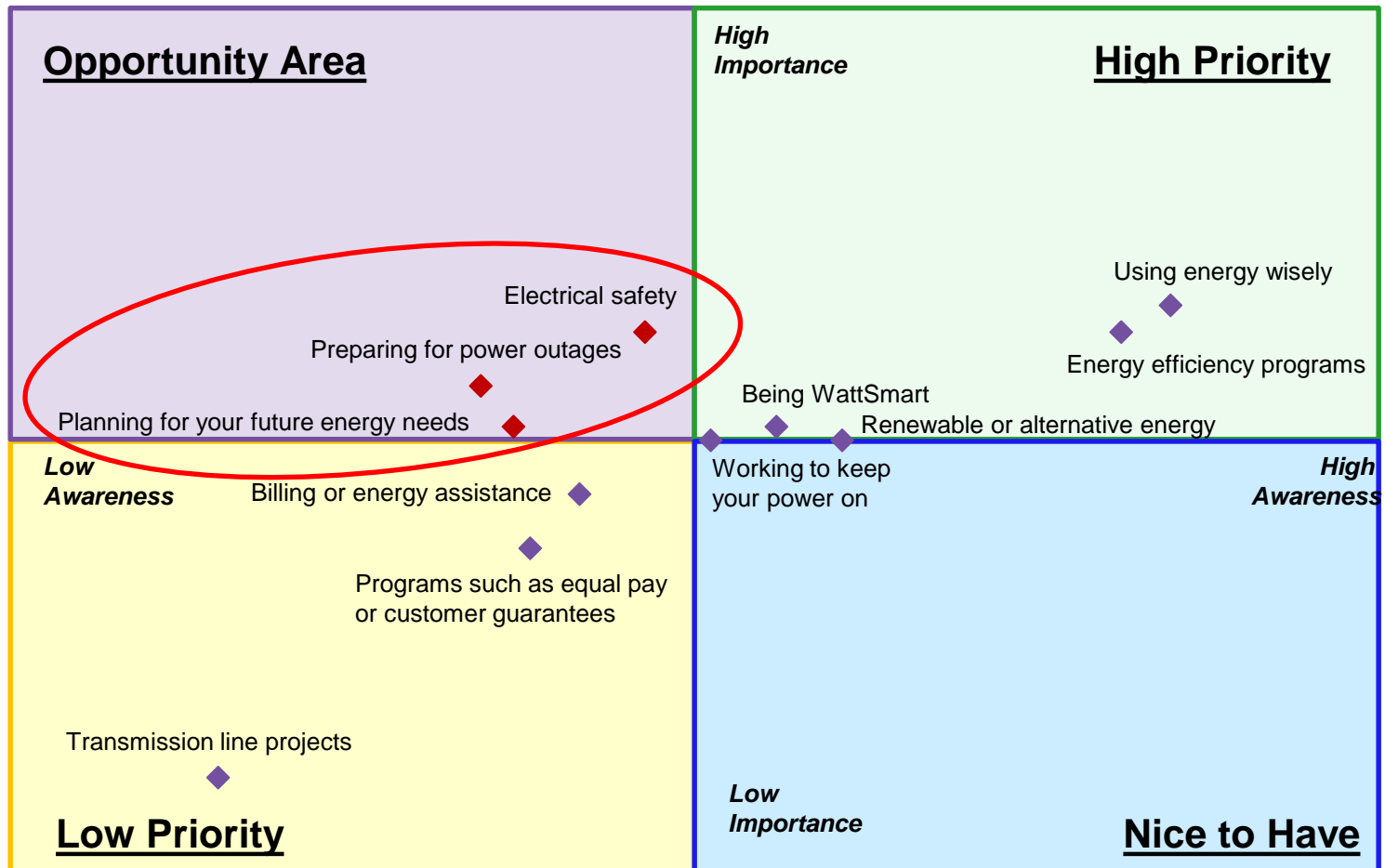
Message Awareness vs. Importance Ratings 2012

2012 Awareness vs. Importance Ratings



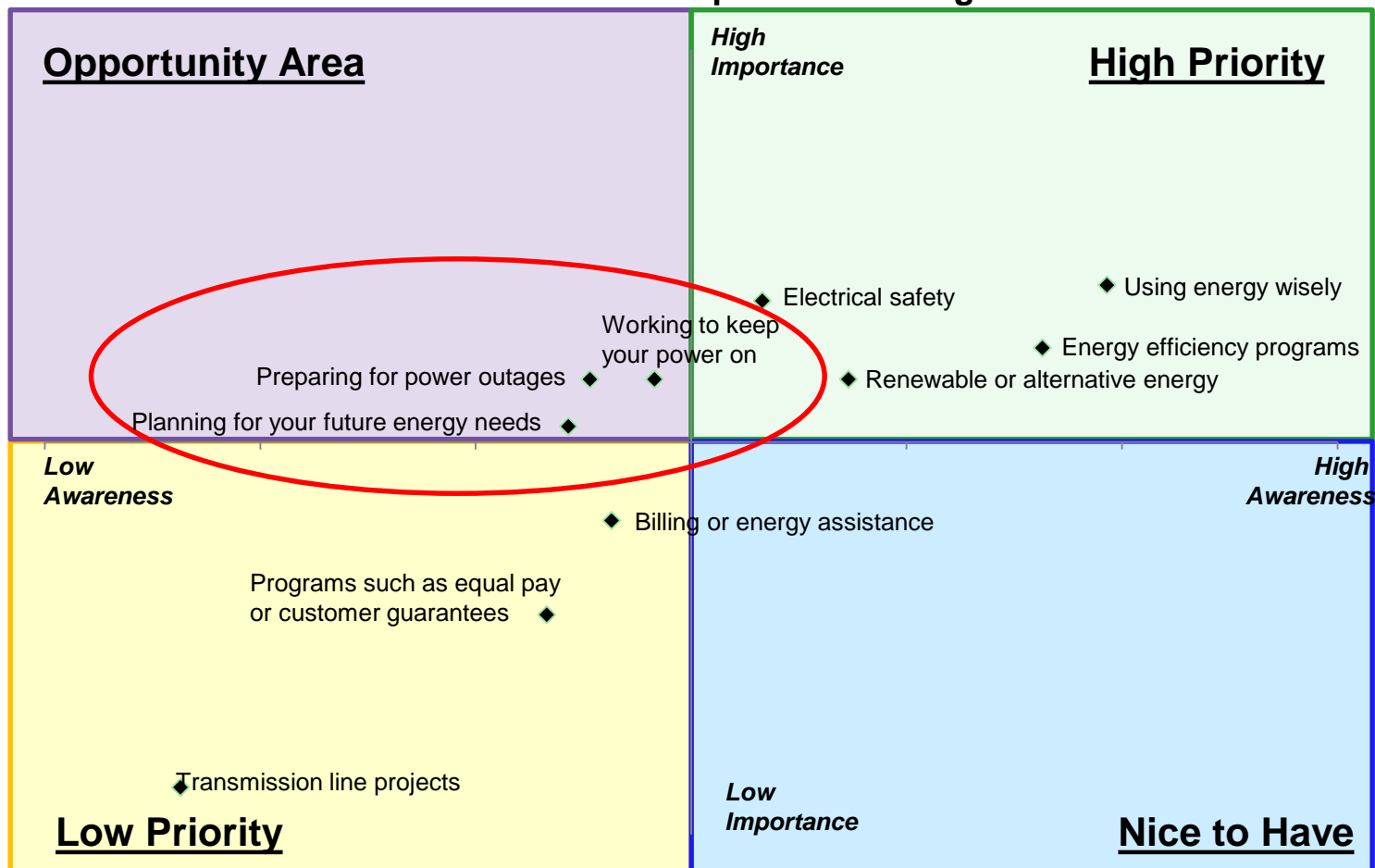
Message Awareness vs. Importance Ratings 2011

2011 Awareness vs. Importance Ratings



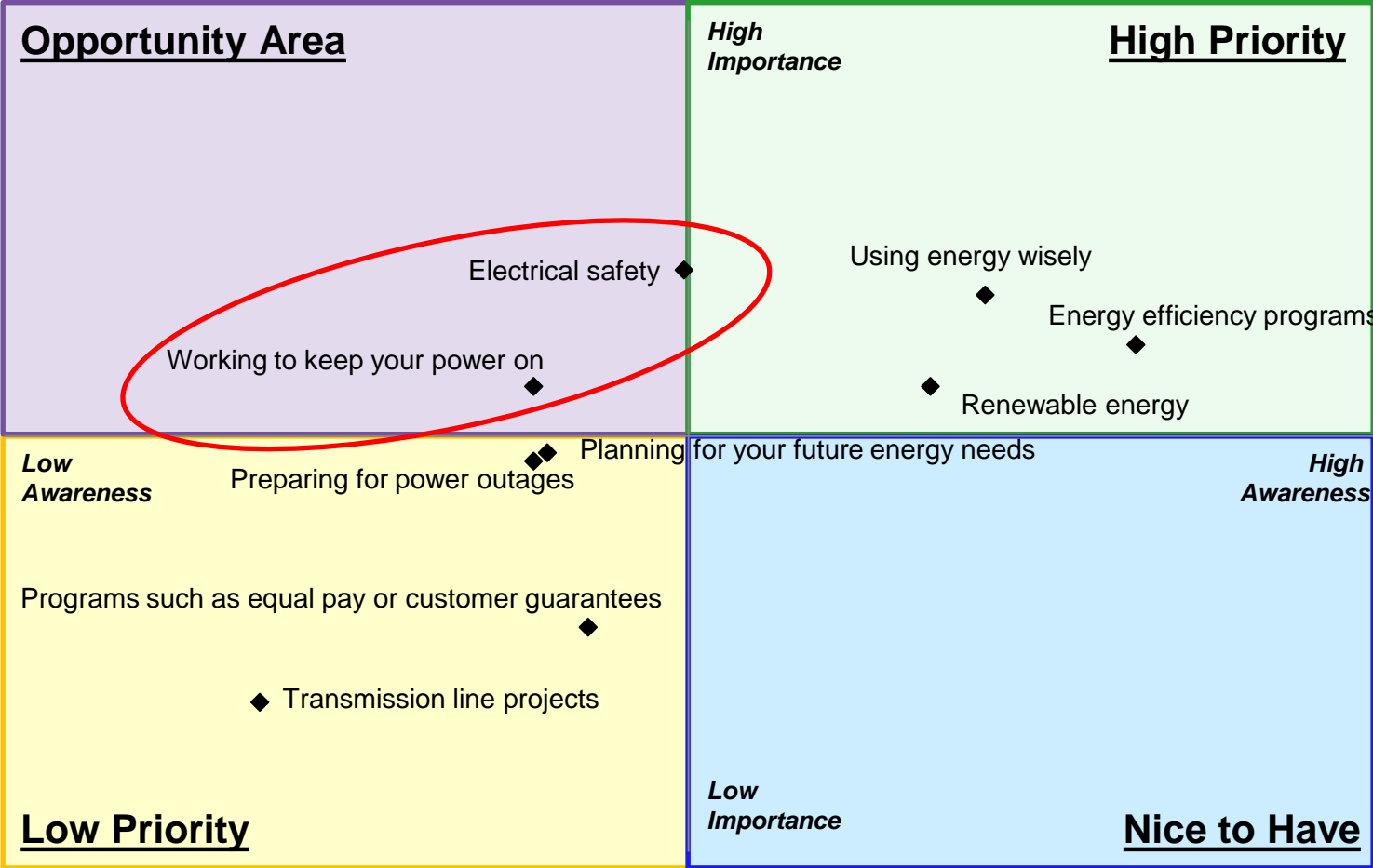
Message Awareness vs. Importance Ratings 2010

2010 Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2009

2009 Awareness vs. Importance Ratings



Additional Suggested Messages 2009-2013

- 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)	2013 (n=200)	2009 (n=200)	2010 (n=218)	2011 (n=300)	2012 (n=200)	2013 (n=200)
All information provided is sufficient	22%	15%	16%	18%	10%	24%	18%	22%	13%	12%
Alternative Energy/Energy Efficiency	34%	19%	19%	11%	11%	40%	18%	14%	11%	9%
Breakdown of how to practice energy efficiency/info on energy efficient appliances	16%	10%	9%	3%	5%	20%	9%	6%	5%	4%
Investment in alternative (green) energy sources	14%	8%	9%	6%	5%	14%	6%	7%	4%	4%
Energy incentive programs	4%	1%	1%	2%	1%	6%	3%	1%	2%	1%
Billing and Payment	26%	17%	13%	3%	5%	20%	12%	9%	5%	4%
Economically sensitive billing practices/programs	18%	10%	6%	1%	1%	14%	5%	4%	<1%	2%
More detailed billing information/customer usage summaries	8%	7%	7%	2%	4%	6%	7%	5%	4%	2%
Corporate Information	19%	7%	15%	8%	5%	19%	8%	16%	12%	4%
Information on company decisions/practices/operations	6%	5%	5%	2%	0%	4%	2%	8%	4%	1%
Information on local projects	4%	1%	0%	0%	0%	4%	1%	0%	0%	0%
List of available services	2%	<1%	2%	<1%	1%	4%	1%	1%	1%	1%
Customer service access	3%	2%	3%	3%	0%	2%	2%	4%	5%	0%
What makes them dependable	2%	0%	2%	0%	0%	3%	1%	2%	1%	0%
Power outage information	2%	0%	3%	2%	4%	2%	1%	1%	1%	2%
Energy Safety	4%	4%	5%	2%	2%	8%	5%	2%	<1%	3%
Don't remember/Don't know	13%	24%	17%	14%	48%	14%	24%	21%	23%	58%
None/Nothing more	16%	22%	24%	32%	1%	22%	25%	24%	31%	0%

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

BLUE = significantly higher than 2012
RED = significantly lower than 2012

Perception of Advertisements & Communications

- Significantly fewer Rocky Mountain Power customers strongly believe the advertisements and communications are informative than in 2012 (42% vs. 54%).

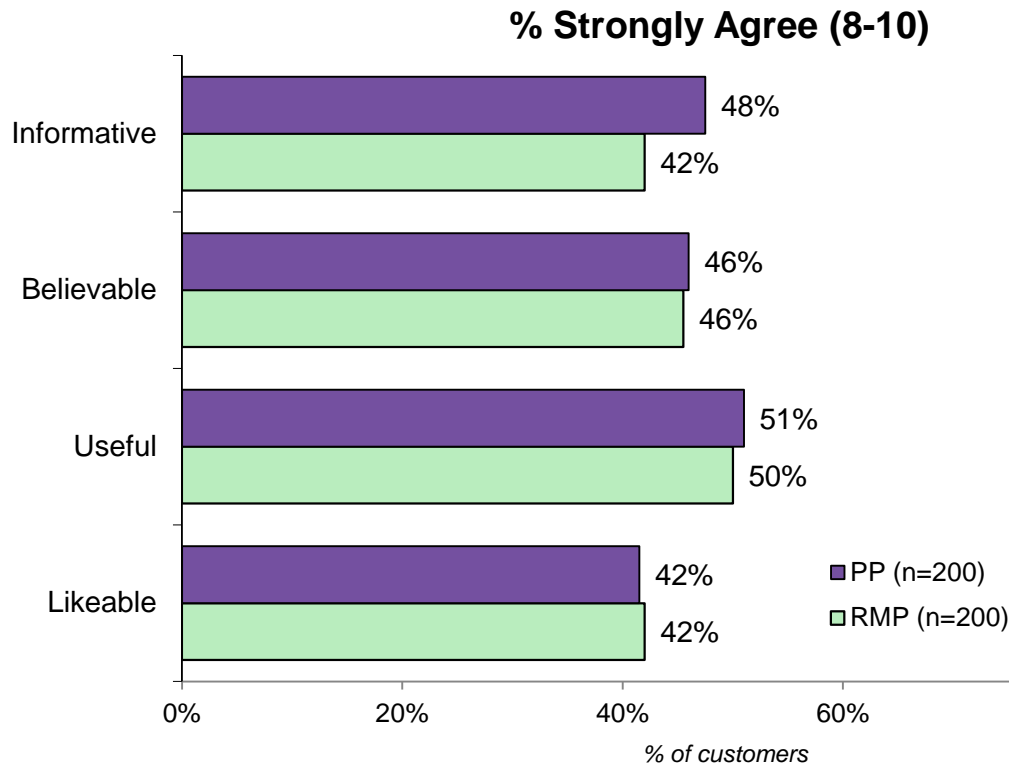
Perception of Advertisements & Communications <i>% Strongly Agree (8-10 ratings)</i>	2009		2010		2011		2012		2013	
	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=200)	Rocky Mt. Power (n=200)
Informative	58%	45%	46%	47%	49%	52%	54%	54%	48%	42%
Believable	54%	50%	48%	42%	48%	45%	44%	50%	46%	46%
Useful	n/a	n/a	45%	48%	49%	48%	48%	47%	51%	50%
Likeable	38%	34%	43%	37%	35%	35%	34%	38%	42%	42%

BLUE = significantly higher than 2012
 RED = significantly lower than 2012

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 2013

- Roughly half perceive their utility's advertisements and communications to be *informative, believable, likeable* and *useful*.
- Perceptions are consistent across both Rocky Mountain Power and Pacific Power customers.



% Strongly Disagree (0-4)	
Pacific Power (n=200)	Rocky Mt. Power (n=200)
12%	8%
10%	12%
9%	12%
13%	10%

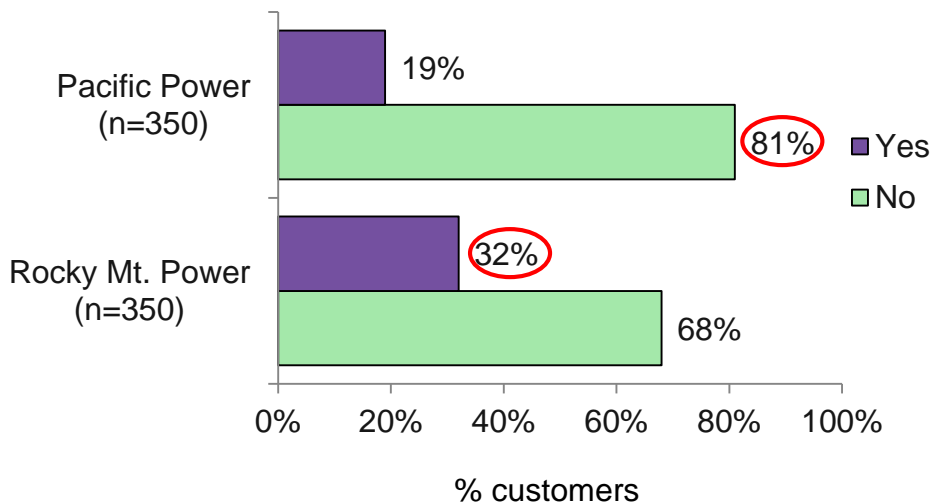
13% = significantly higher than other utility

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” 2009-2013

- 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.

**2013 Recall of
“Let’s Turn the Answers On”**



2009 Pacific Power (n=200)	2010 Pacific Power (n=220)	2011 Pacific Power (n=500)	2012 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)	2010 Rocky Mt. Power (n=218)	2011 Rocky Mt. Power (n=500)	2012 Rocky Mt. Power (n=200)
16% yes	22% yes	20% yes	19% yes	28% yes	42% yes	37% yes	33% yes
84% no	78% no	80% no	81% no	72% no	58% no	63% no	67% no

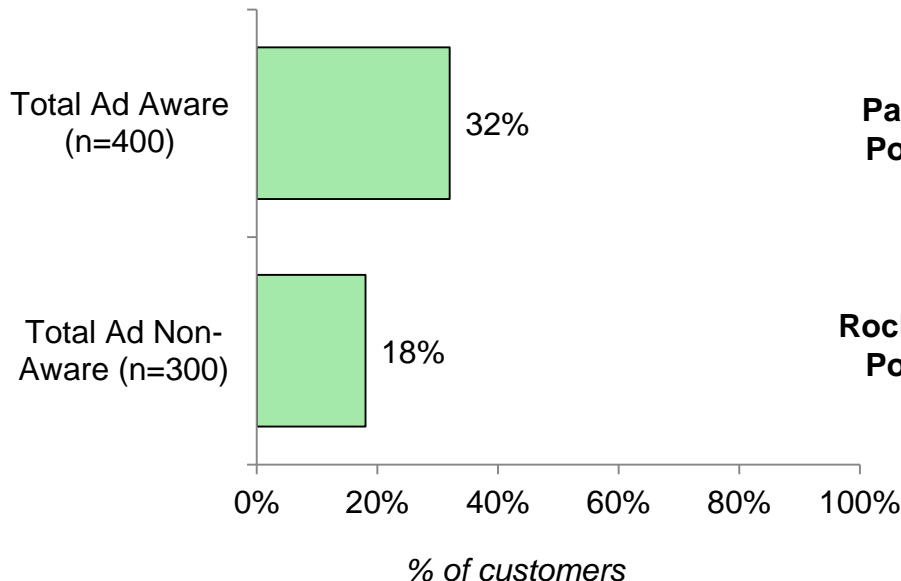
= significantly higher than other utility

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

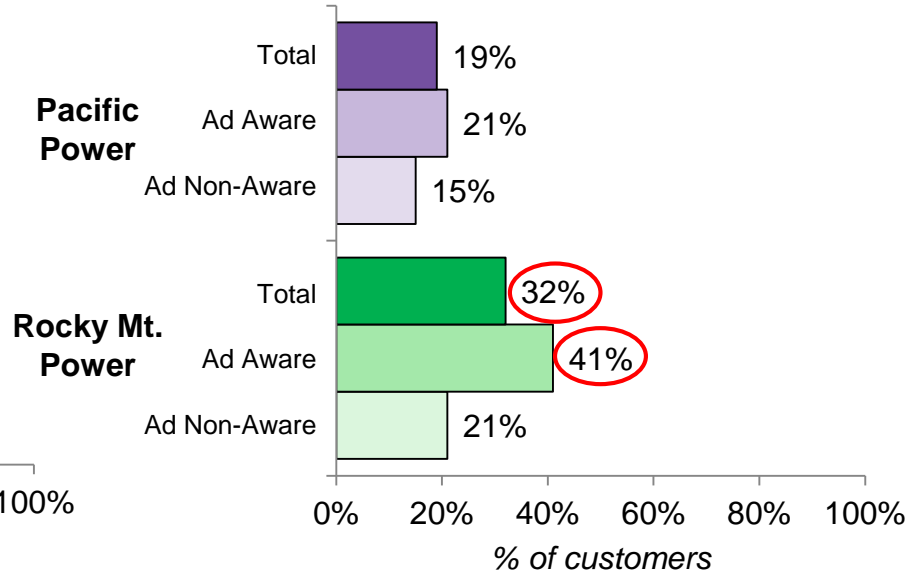
“Let’s Turn the Answers On” 2013

- One third (32%) 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.

Recall of
“Let’s Turn the Answers On”



Recall of
“Let’s Turn the Answers On”

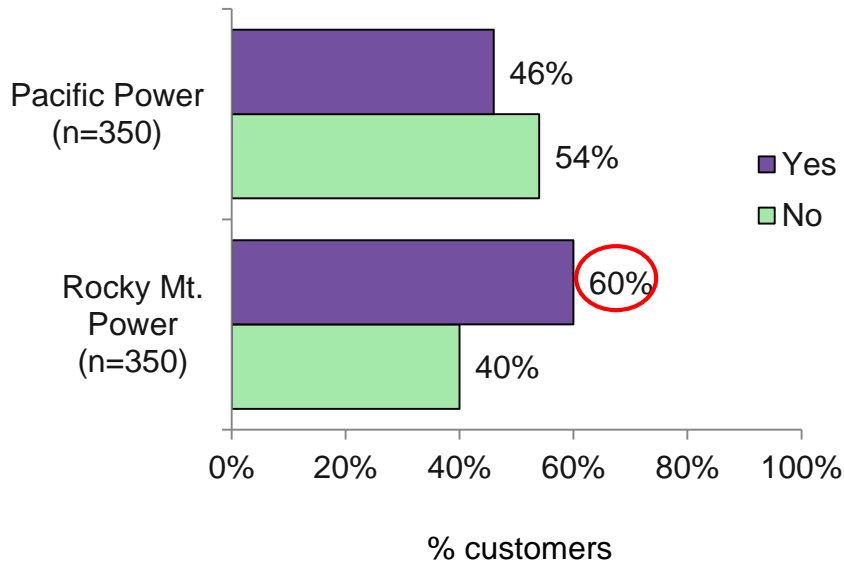


 = significantly higher than other utility


“Being Wattsmart” 2011-2013

- Recall of “Being Wattsmart” has remained consistent across both utilities between 2012 and 2013.
 - Rocky Mountain Power customers are significantly more likely than Pacific Power customers to recall “Being Wattsmart”

2013 Recall of
“Being Wattsmart”



2012 Pacific Power (n=350)	2012 Rocky Mt. Power (n=350)
47% yes	54% yes
53% no	46% no

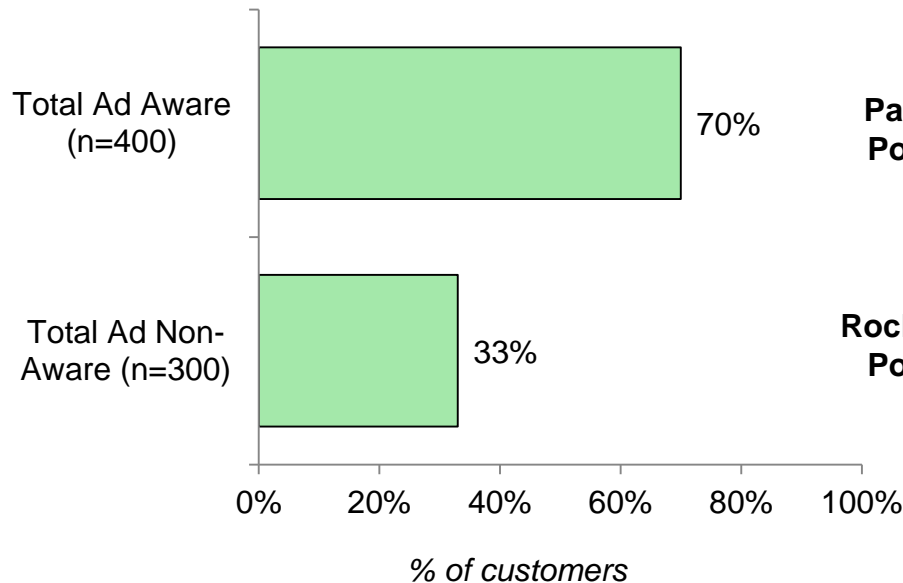
 = significantly higher than other utility

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

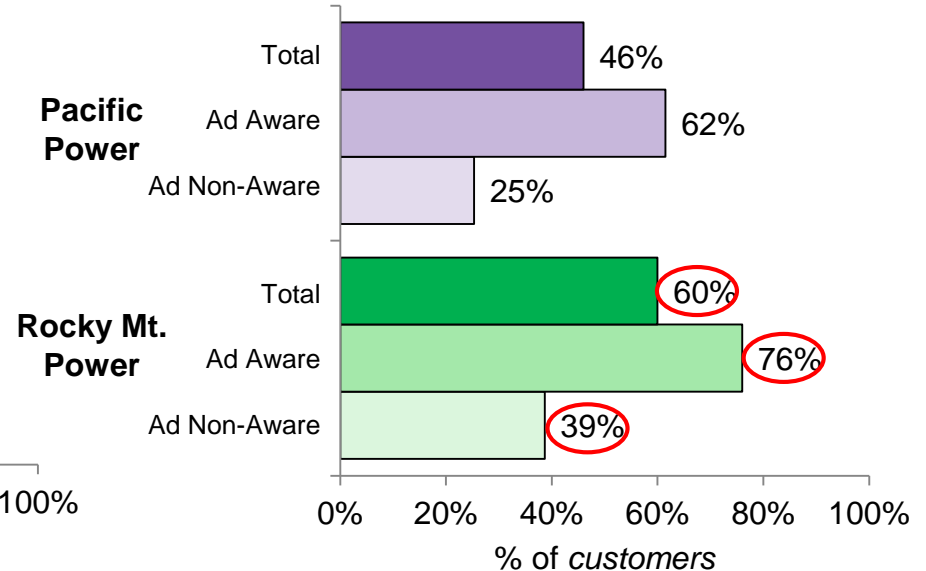
“Being Wattsmart” 2013

- Seven in ten (70%) of all Ad Aware customers recall the phrase “Being Wattsmart.”
- Rocky Mountain Power customers are significantly more likely to recall “Being Wattsmart” in both Ad Aware and Ad Non-Aware groups.

Recall of
“Being Wattsmart”



Recall of
“Being Wattsmart”



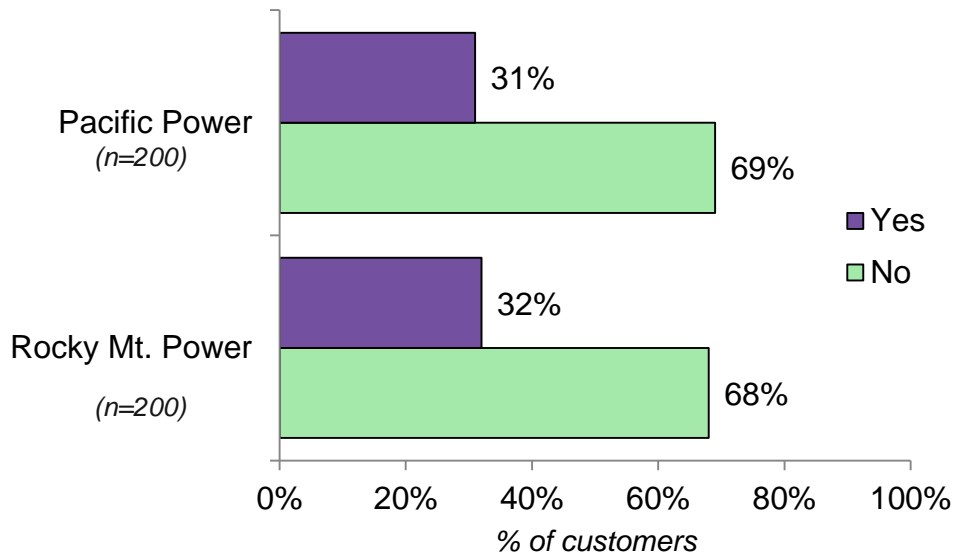
 = significantly higher than other utility

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 2009-2013

- For Pacific Power and Rocky Mountain Power, the percentage of customers persuaded to take action based on the advertisements remained consistent with 2012.

2013 Took Action Based on Advertising



2009 Pacific Power (n=200)	2010 Pacific Power (n=220)	2011 Pacific Power (n=300)	2012 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)	2010 Rocky Mt. Power (n=218)	2011 Rocky Mt. Power (n=300)	2012 Rocky Mt. Power (n=200)
24% yes	22% yes	21% yes	30% yes	30% yes	30% yes	39% yes	30% yes
76% no	78% no	79% no	70% no	70% no	70% no	61% no	70% no

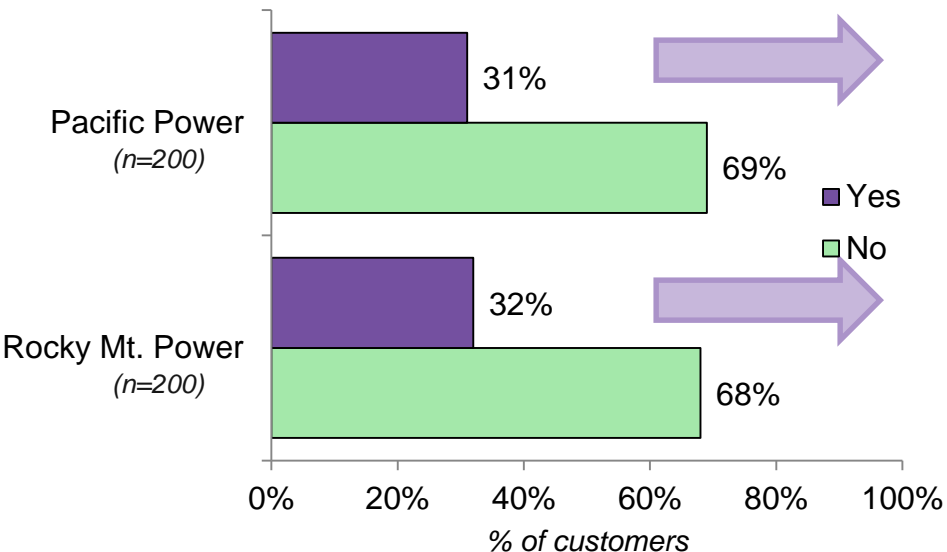
 = significantly higher than other utility

Q12 Did any of the UTILITY ads or communications persuade you to take any action?

Actions Taken Based on Advertisements 2013

- Overall, one third (32%) of Ad Aware customers report taking some action based on the advertisements or communications.
- Of customers persuaded to take action, “Purchased/switched to energy efficient appliances/lights,” and “shutting off lights/appliances when not in use” were the top two actions taken overall.
 - Pacific Power customers are significantly more likely to invest in the Blue Sky program than Rocky Mountain Power customers.*

Took Action Based on Advertising



Actions taken from seeing the ads or communications	Pacific Power (n=62)	Rocky Mt. Power (n=65)
Purchased/switched to energy efficient appliances/lights	18%	26%
Shutting off lights/appliances when not in use	13%	18%
Enlisting in utility incentive/rebate programs	15%	5%
Invested in equal bill pay	10%	8%
More aware of power usage (general)	6%	9%
Invested in Blue Sky program	13%	3%
Becoming more cautious of energy safety	3%	2%
Wattsmart	3%	9%
Changing daily use of appliances	6%	2%

13% = significantly higher than other utility

Q12 Did any of the UTILITY ads or communications persuade you to take any action?

Q13 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

- Ad Aware customers' level of satisfaction with the company is consistent with last year.

Ad Aware: Advertisements' Impact on Company Satisfaction	2009		2010		2011		2012		2013	
	Pacific Power	Rocky Mt. Power	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=200)	(n=218)	(n=300)	(n=300)	(n=200)	(n=200)	(n=200)	(n=200)
Very satisfied (8-10 ratings)	81%	78%	75%	72%	66%	76%	68%	78%	70%	74%
Moderately satisfied (5-7 ratings)	16%	20%	19%	22%	28%	21%	26%	20%	23%	22%
Not satisfied (0-4 ratings)	2%	2%	4%	6%	5%	3%	5%	2%	7%	4%

BLUE = significantly higher than 2012
 RED = significantly lower than 2012

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

- Roughly two thirds of Rocky Mountain Power and Pacific Power Ad Non-Aware customers are “very satisfied” with their utility company.
- Pacific Power saw a significant increase in “very satisfied” ratings this year (69% vs. 56% 2012), moving back to 2011 levels (68%).

Ad Non-Aware: Advertisements' Impact on Company Satisfaction	2009		2010		2011		2012		2013	
	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power
	(n=150)	(n=150)	(n=150)	(n=150)	(n=200)	(n=200)	(n=150)	(n=150)	(n=150)	(n=150)
Very satisfied (8-10 ratings)	65%	69%	63%	64%	68%	76%	56%	69%	69%	60%
Moderately satisfied (5-7 ratings)	27%	26%	27%	28%	21%	15%	27%	27%	26%	32%
Not satisfied (0-4 ratings)	6%	4%	11%	6%	9%	8%	13%	4%	3%	5%

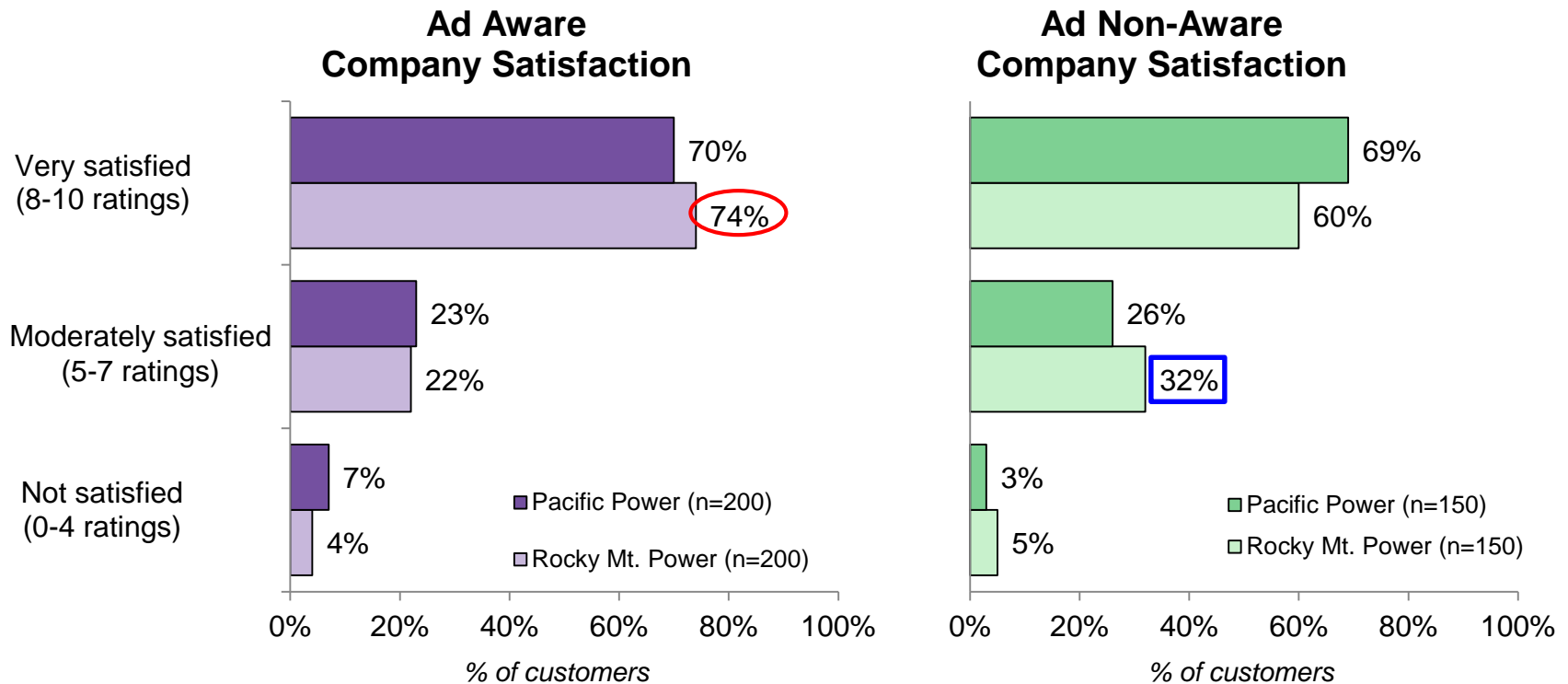
BLUE = significantly higher than 2012

RED = significantly lower than 2012

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 – 2013

- Overall, Rocky Mountain Power customers are more likely to be “very satisfied” with their utility than Pacific Power customers.
 - Rocky Mountain Power Ad Aware customers are significantly more satisfied than Ad Non-Aware customers to be “very satisfied” (74% vs. 60%).



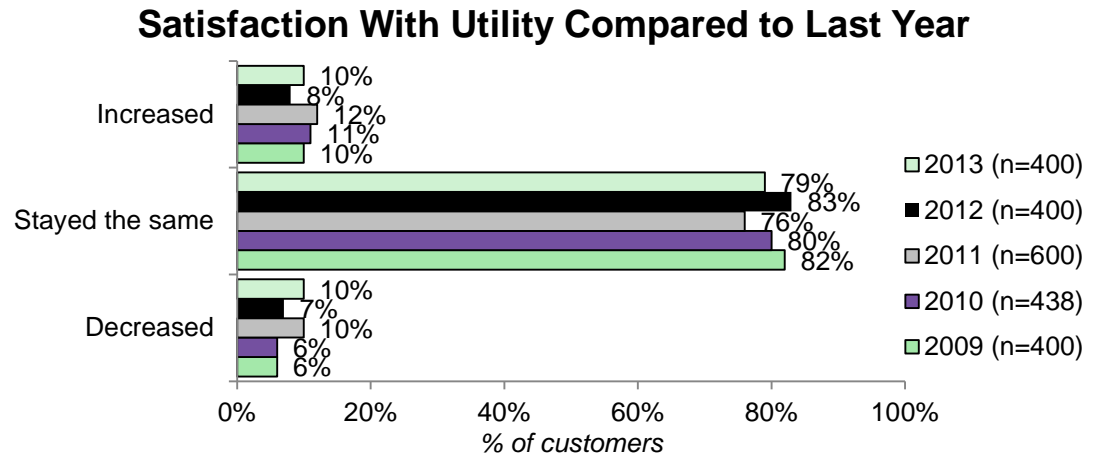
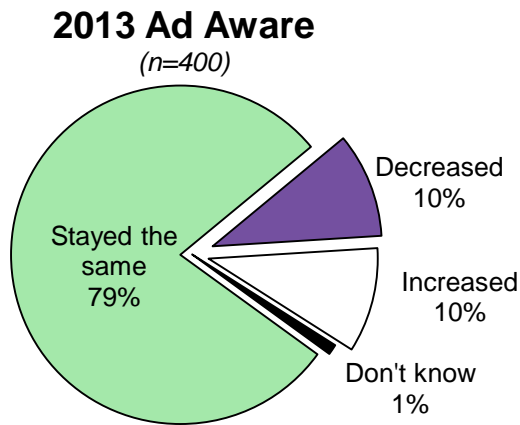
Q16 Now I'm going to ask some questions about your satisfaction with UTILITY. First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

74% = significantly higher than Ad Non-Aware customers
32% = significantly higher than Ad Aware customers

Satisfaction Comparison With Previous Years

Ad Aware

- Over three fourths (79%) of Ad Aware customers state that their satisfaction with their utility company has remained unchanged since the previous year.



Why has your satisfaction increased?	2013
	(n=42)
Good reliable service	27%
Quality of customer service	19%
Billing services/assistance	12%
Lower rates/affordable price	10%
Keeping people informed	8%
Utility's energy conservation efforts	8%
Other	26%

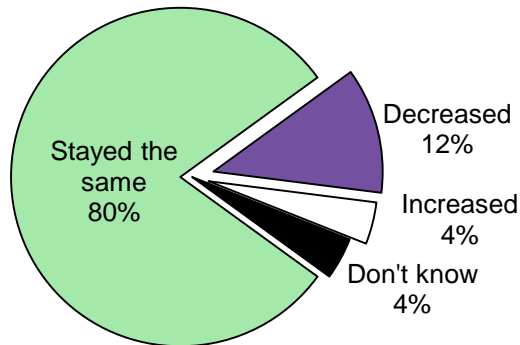
Why has your satisfaction decreased?	2013
	(n=37)
Increased cost/rates	50%
Quality of customer service	14%
Poor service (general)	13%
Lack of communication w/customers	10%
Billing services/assistance	8%
Many service interruptions	8%
Other	19%

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

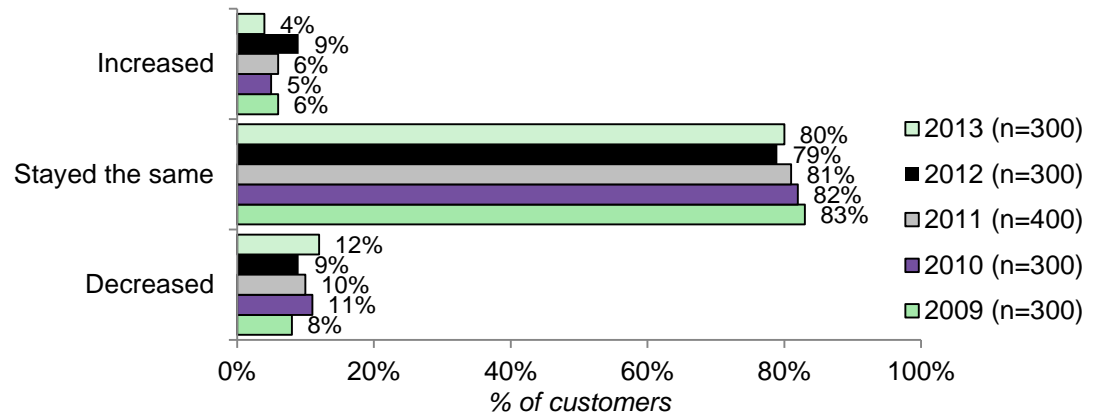
Satisfaction Comparison With Previous Years Ad Non-Aware

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

2013 Ad Non-Aware
(n=300)



Satisfaction With Utility Compared to Last Year

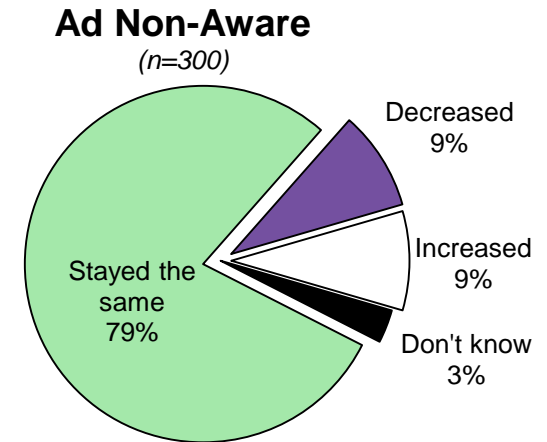
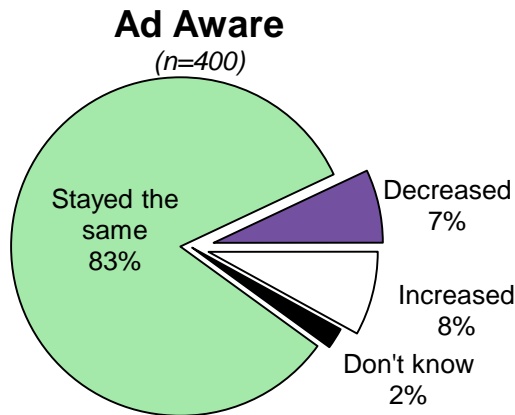


Why has your satisfaction increased?	2013
	(n=13)*
Good reliable service	41%
Quality of customer service	14%
Billing services assistance	14%
Lower rates/affordable price	16%
Other	23%

Why has your satisfaction decreased?	2013
	(n=36)
Increased cost/rates	75%
Billing services/assistance	9%
Many service interruptions	6%
Installation of smart meters	5%
Poor service (general)	2%
Lack of communication w/customers	2%
Other	11%

Satisfaction Comparison Between Ad Aware and Ad Non-Aware 2013

- 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%

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%

*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.
- In 2013, Ad Aware customers are significantly more likely to strongly agree their utility provides electricity at a reasonable cost (49% vs. 40% in 2012).
- 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
 - Has plans to meet future energy needs
 - Provides electricity at a reasonable cost
- 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 2009-2013

- In 2013, Ad Aware customers are significantly more likely to “strongly agree” their utility provides electricity at a reasonable cost. (49% vs. 40%).

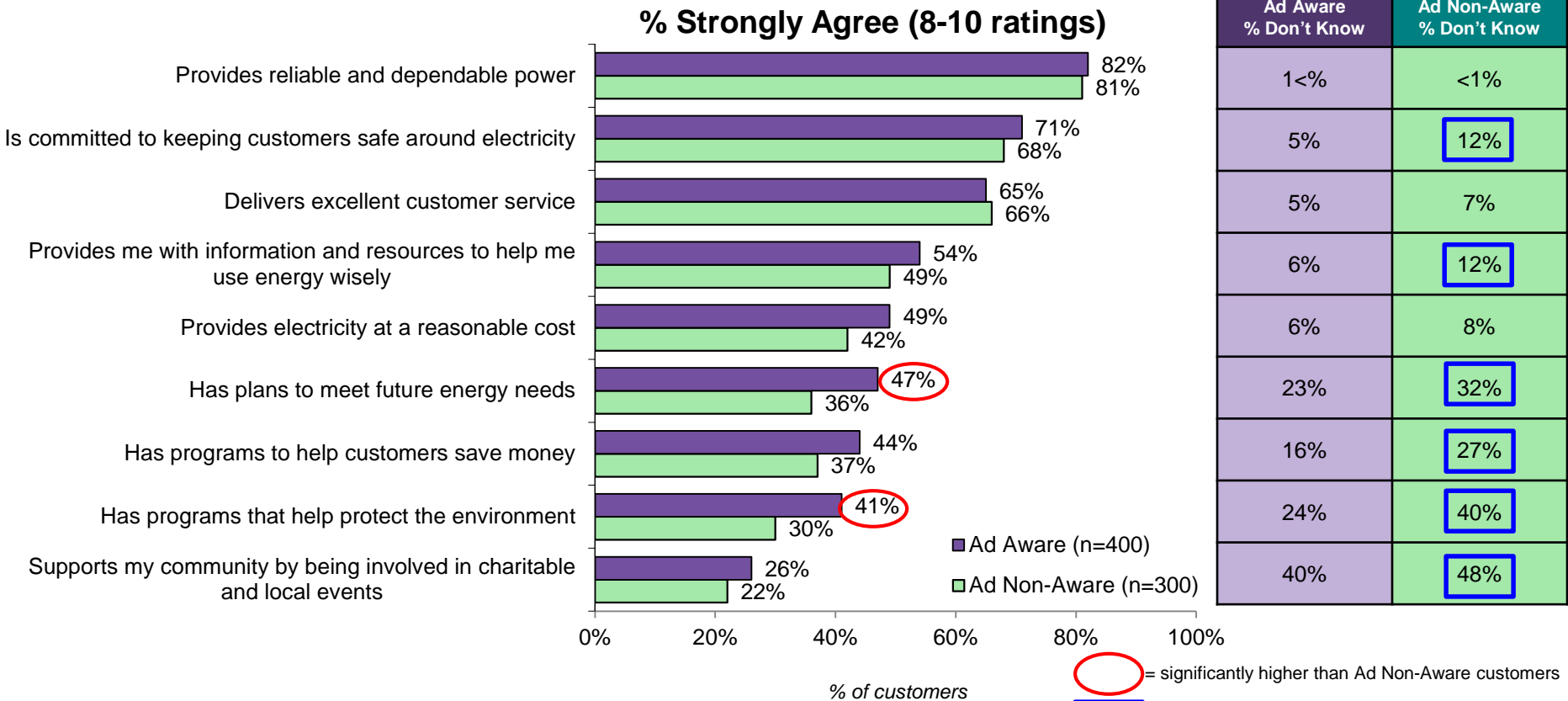
Company Image Attributes (% “strongly agree” 8-10 ratings)	2009		2010		2011		2012		2013	
	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware
	(n=400)	(n=300)	(n=438)	(n=300)	(n=600)	(n=400)	(n=400)	(n=300)	(n=400)	(n=300)
Provides reliable and dependable power	85%	80%	81%	72%	77%	80%	79%	77%	82%	81%
Is committed to keeping customers safe around electricity	72%	67%	74%	66%	76%	69%	70%	65%	71%	68%
Delivers excellent customer service	64%	62%	65%	58%	66%	66%	64%	61%	65%	66%
Provides me with information and resources to help me use energy wisely	55%	55%	57%	52%	56%	54%	54%	46%	54%	49%
Has plans to meet future energy needs	48%	38%	51%	42%	47%	38%	43%	37%	47%	36%
Provides electricity at a reasonable cost	46%	44%	48%	40%	41%	41%	40%	41%	49%	42%
Has programs to help customers save money	46%	41%	47%	35%	49%	44%	45%	40%	44%	37%
Has programs that help protect the environment	42%	38%	41%	34%	42%	34%	41%	34%	41%	30%
Supports my community by being involved in charitable and local events	24%	19%	27%	19%	25%	21%	21%	22%	26%	22%

BLUE = significantly higher than 2012
RED = significantly lower than 2012

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 2013

- Ad Aware customers are significantly more likely than Ad Non-Aware customers to “strongly agree” their utility has plans to meet future energy needs and they have programs to 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 2013

(by Utility & Ad Awareness)

- Ad Aware Pacific Power customers are significantly more likely to “strongly agree” their utility company has plans to meet future energy needs than Ad Non-Aware Pacific Power customers.

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	80%	84%	81%	81%
Is committed to keeping customers safe around electricity	68%	72%	64%	71%
Delivers excellent customer service	66%	65%	71%	62%
Provides me with information and resources to help me use energy wisely	55%	54%	48%	49%
Has plans to meet future energy needs	50%	44%	37%	35%
Provides electricity at a reasonable cost	46%	51%	42%	42%
Has programs to help customers save money	46%	42%	40%	34%
Has programs that help protect the environment	45%	38%	37%	33%
Supports my community by being involved in charitable and local events	28%	24%	25%	19%

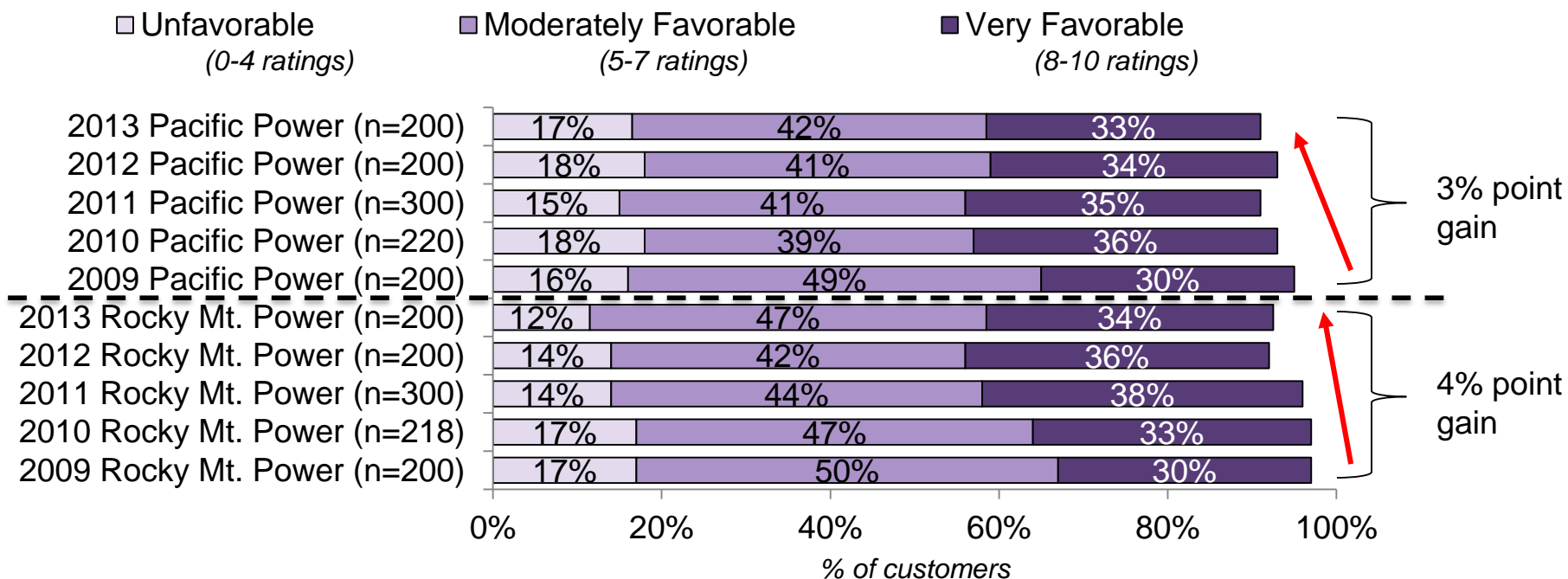
Q19 Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

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

Advertisements' Impact on Company Image 2009-2013

- One third (33%) 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



Q14 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 2013

Very Favorable (8-10 rating) <i>(n=133)</i>	Moderately Favorable (5-7 rating) <i>(n=179)</i>	Least Favorable (0-4 rating) <i>(n=55)</i>
13% Helpful Customer Service (2% - 2012)	21% Neutral feeling towards them (21% - 2012, 20% - 2011)	15% Limited choice in utility provider/monopoly (16% - 2012, 18% - 2011, 20% - 2010, 20% - 2009)
12% Information is useful to energy habits/usage (20% - 2012, 16% - 2011, 10% - 2010, 25% - 2009)	11% Limited choice in utility provider/monopoly (10% - 2012, 7% - 2011, 14% - 2010, 11% - 2009)	13% Misleading/fluctuating costs (9% - 2012, 8% - 2011, 13% - 2010, 14% - 2009)
10% Utility has positive practices/operation (34% - 2012, 32% - 2011, 47% - 2010, 49% - 2009)	7% Haven't Paid Attention	10% Need more information on energy safety.
10% Commercials are good (6%, -2012 1% - 2011)	6% Misleading/Fluctuating Costs	9% Commercials are annoying/bad
2% Information on energy savings/bill minimizing practices (7% - 2012, 8% - 2011, 9% - 2010, 15% - 2009)	4% Information given was already common knowledge (6% - 2012)	6% Neutral feeling towards them (9% - 2012)
1% Advertisements serve as education to consumers (8% - 2012, 31% - 2011, 19% - 2010, 29% - 2009)	3% Utility has positive business practices/operation (6% - 2012, 9% - 2011, 21% - 2010, 20% - 2009)	5% Haven't paid attention

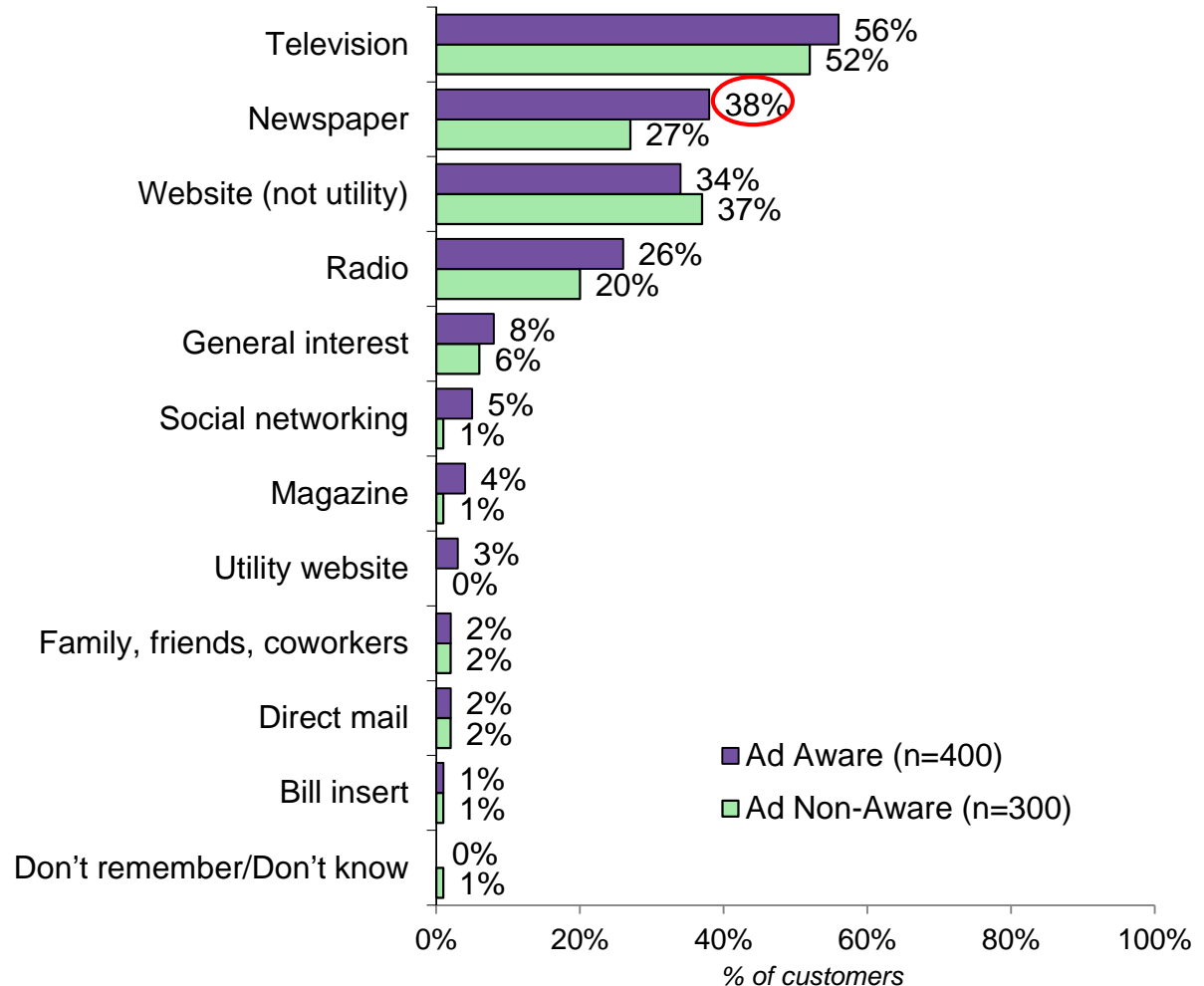


Communication Sources

News & Current Event Sources 2013

- 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) (54% vs. 29%).
- Ad Aware customers are significantly more likely to read the newspaper than Ad Non-Aware customers.

News & Current Event Channels



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

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

News & Current Event Sources 2009-2013

- Television is still the primary source for news, however websites became the second most used source surpassing newspapers.
 - Ad Non-Aware customers mention websites (non-utility) as a source significantly more (37% vs. 26%) and Newspapers significantly less (27% vs. 36%) than in 2012.

News & Current Event Sources	2009		2010		2011		2012		2013	
	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)	Ad Aware (n=400)	Ad Non-Aware (n=300)
Television	68%	68%	64%	62%	67%	57%	58%	61%	56%	52%
Website (not utility)	30%	27%	30%	27%	32%	33%	31%	26%	34%	37%
Newspaper	52%	41%	48%	38%	43%	30%	41%	36%	38%	27%
Radio	25%	18%	21%	15%	18%	13%	21%	17%	26%	20%
General internet	n/a	n/a	3%	4%	7%	6%	7%	5%	8%	6%
Social networking	3%	1%	4%	2%	4%	3%	4%	6%	5%	1%
Bill insert	3%	2%	2%	1%	2%	3%	3%	4%	1%	1%
Magazine	5%	2%	2%	2%	3%	1%	3%	3%	4%	1%
Utility website	3%	2%	3%	2%	2%	2%	3%	2%	3%	0%
Family, friends, coworkers	2%	5%	3%	4%	1%	1%	3%	1%	2%	2%
Direct mail	3%	3%	3%	3%	<1%	1%	2%	2%	2%	2%
Don't remember/Don't know	1%	4%	1%	6%	1%	5%	2%	2%	0%	1%

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

BLUE = significantly higher than 2012
RED = significantly lower than 2012

Utility Information Sources 2009-2013

- Sources of utility information remain consistent with the previous year, with bill inserts, television, utility websites and direct mail being the primary sources.
 - Ad Non-Aware customers rely on direct mail significantly more than in 2012.

Utility Information Sources	2009		2010		2011		2012		2013	
	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)	Ad Aware (n=400)	Ad Non-Aware (n=300)
Bill insert	42%	42%	38%	40%	41%	34%	38%	35%	31%	31%
Television	24%	11%	27%	13%	30%	11%	19%	14%	15%	9%
Website (Pacific Power/Rocky Mt. Power)	12%	9%	12%	6%	20%	18%	18%	13%	20%	13%
Direct mail	19%	16%	15%	12%	11%	12%	17%	11%	20%	18%
Newspaper	18%	11%	18%	10%	14%	9%	8%	9%	12%	6%
Website (not utility)	4%	3%	6%	4%	6%	4%	6%	8%	7%	7%
Radio	6%	2%	5%	3%	7%	2%	7%	3%	5%	2%
Call customer service	3%	3%	1%	1%	2%	3%	3%	3%	1%	1%
Family, friends, coworkers	2%	2%	2%	4%	1%	1%	2%	1%	2%	1%
Don't remember/Don't know	8%	18%	9%	22%	8%	20%	7%	11%	6%	18%

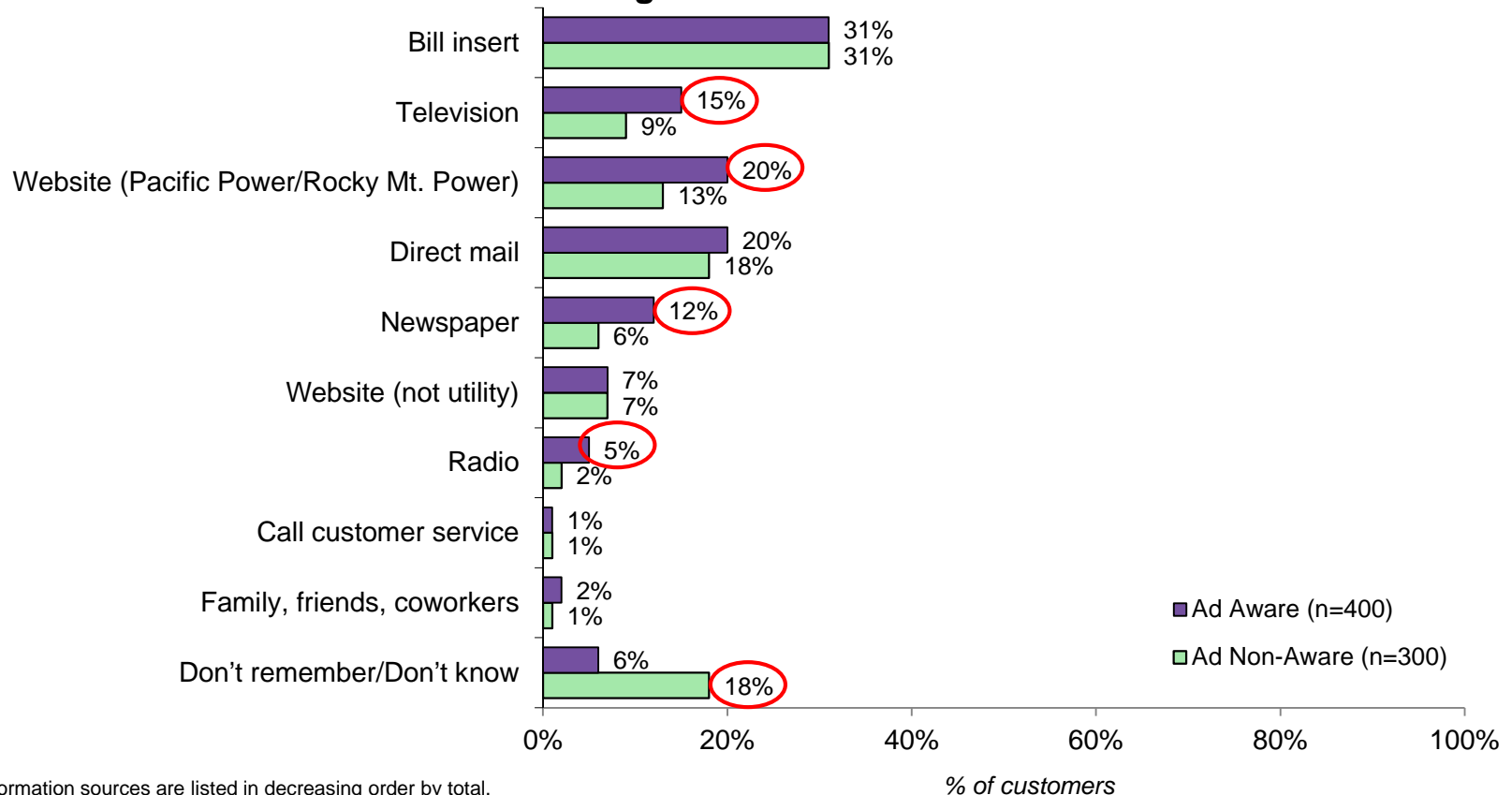
Q21 What sources do you typically rely on for information about UTILITY?

BLUE = significantly higher than 2012
RED = significantly lower than 2012

Utility Information Sources 2013

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

Advertising & Communication Channels



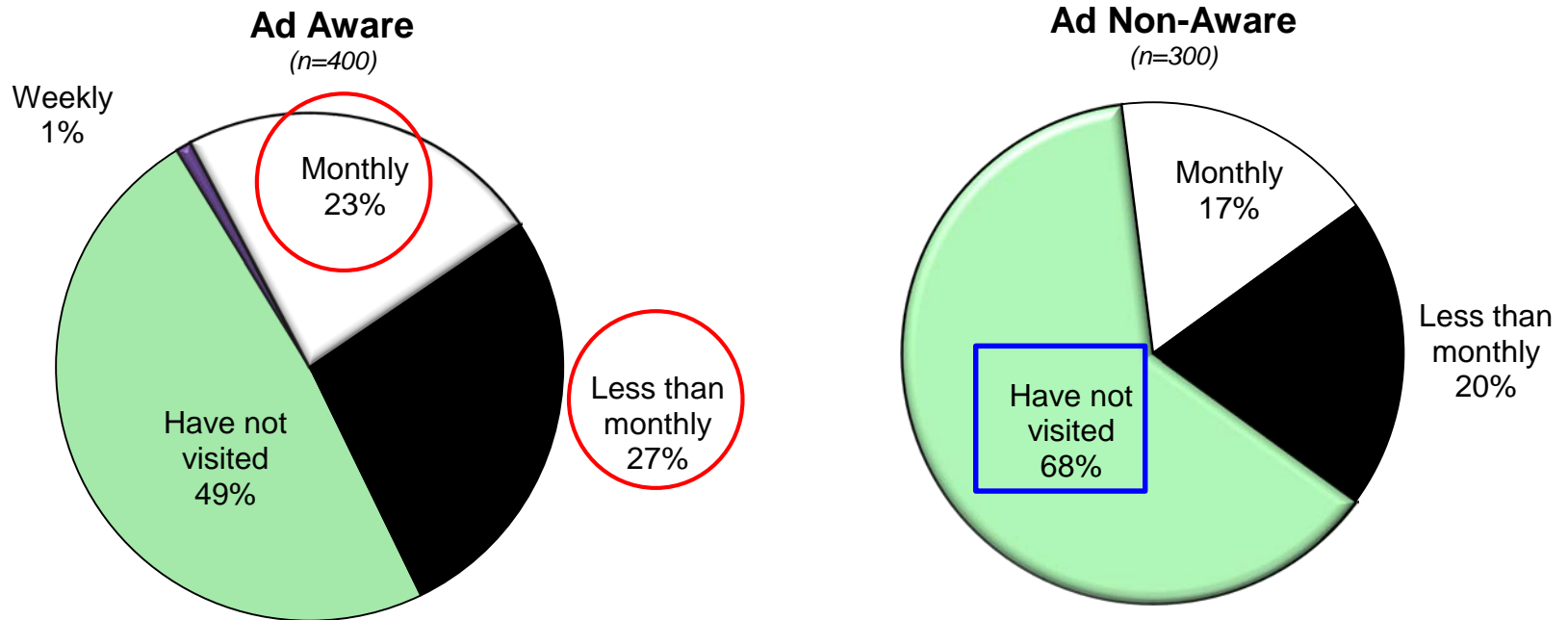
 = significantly higher than Ad Non-Aware customers

 = significantly higher than Ad Aware customers

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

Visiting Electric Utility Website

- Half (50%) of Ad Aware, and one third (37%) of Ad Non-Aware customers have visited their electric utility's website, consistent with 2012 figures.
- 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 2013

- Consistent with 2012, one third (36%) of respondents are aware of energy efficiency programs offered by Pacific Power and Rocky Mountain Power.
 - Washington's awareness increased significantly from 24% in 2012 to 44% in 2013.

EE Awareness	Oregon		Washington		California		Utah		Wyoming		Idaho	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
	(n=266)	(n=266)	(n=62)	(n=62)	(n=22)*	(n=22)*	(n=277)	(n=277)	(n=200)	(n=200)	(n=26)*	(n=26)*
Yes	29%	33%	24%	44%	23%	32%	37%	40%	22%	28%	38%	35%
No	66%	56%	68%	48%	73%	64%	57%	54%	76%	68%	62%	62%
Don't remember/Don't know	6%	11%	8%	11%	5%	5%	5%	5%	3%	4%	0%	4%

*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?

BLUE = significantly higher than 2012
RED = significantly lower than 2012

Unaided EE Program Recall 2013

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

Program Recall	Oregon		Washington		California		Utah		Wyoming		Idaho	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
	(n=266)	(n=266)	(n=62)	(n=62)	(n=22)*	(n=22)*	(n=277)	(n=277)	(n=200)	(n=200)	(n=26)*	(n=26)*
Cool Keeper	5%	5%	3%	3%	9%	0%	7%	7%	6%	6%	4%	0%
Home Energy Savings	5%	6%	2%	0%	5%	0%	3%	4%	1%	4%	0%	4%
See Ya Later, Refrigerator	4%	4%	5%	3%	5%	9%	3%	7%	3%	7%	4%	0%
Wattsmart	3%	4%	0%	3%	9%	0%	3%	7%	3%	5%	0%	4%
Low Income Weatherization	2%	6%	3%	5%	9%	5%	3%	4%	1%	5%	0%	0%
Home Energy Analysis	2%	6%	5%	0%	5%	5%	7%	2%	5%	1%	4%	0%
Cool Cash Incentive	2%	6%	0%	10%	5%	0%	2%	6%	1%	3%	8%	7%
Energy Star New Homes	2%	6%	0%	5%	5%	5%	13%	3%	1%	2%	0%	4%
Time of Day	2%	3%	2%	2%	5%	0%	5%	2%	4%	0%	8%	0%
Powerforward	1%	1%	0%	1%	5%	0%	0%	1%	1%	0%	4%	0%
Blue Sky	1%	0%	0%	0%	0%	0%	1%	0%	1%	0%	0%	0%
None	80%	75%	82%	66%	82%	82%	69%	64%	83%	77%	69%	73%

BLUE = significantly higher than 2012
RED = significantly lower than 2012

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

Total EE Program Recall 2013

- 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."
- Both Washington and Utah customers show high awareness of the "See Ya Later, Refrigerator" program.

Program Recall	Oregon		Washington		California		Utah		Wyoming		Idaho	
	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013	2012	2013
	(n=266)	(n=266)	(n=62)	(n=62)	(n=22)*	(n=22)*	(n=277)	(n=277)	(n=200)	(n=200)	(n=26)*	(n=26)*
Cool Keeper	n/a	n/a	n/a	n/a	n/a	n/a	60%	41%	n/a	n/a	n/a	n/a
See Ya Later, Refrigerator	35%	41%	74%	66%	64%	55%	74%	68%	46%	46%	38%	50%
Home Energy Savings	46%	46%	66%	54%	68%	45%	61%	61%	46%	50%	46%	50%
Wattsmart	48%	45%	53%	64%	55%	41%	54%	58%	37%	41%	27%	34%
Energy Star New Homes	n/a	n/a	n/a	n/a	n/a	n/a	44%	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%	38%	n/a	n/a	n/a	n/a
Low Income Weatherization	43%	45%	39%	39%	64%	50%	26%	26%	29%	25%	35%	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 2013

- Consistent with 2012, half of all respondents from Oregon have heard of the Energy Trust of Oregon.
 - Of these respondents, slightly less than half (43%) 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?

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=200)	2012 (n=266)	2013 (n=266)
Yes	52%	54%	62%
No	46%	43%	37%
Don't remember/Don't know	2%	3%	2%



	Oregon		
	2011 (n=103)	2012 (n=143)	2013 (n=164)
Yes	47%	48%	43%
No	51%	50%	51%
Don't remember/Don't know	2%	3%	6%

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?



2013 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	21%	25%	15%	22%
5-9 years	51%	38%	25%	58%
10-14 years	11%	14%	14%	9%
15-19 years	8%	7%	11%	7%
20-24 years	10%	6%	10%	11%
25-29 years	4%	3%	5%	2%
30-39 years	12%	11%	15%	12%
40-49 years	9%	6%	12%	6%
50+ years	12%	7%	9%	12%

 = 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	24%	30%	17%	25%
35-54	26%	32%	27%	30%
55+	49%	38%	55%	45%
Refused	--	<1%	1%	--



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	14%	6%	12%	9%
\$15-\$30,000	20%	14%	24%	16%
\$30-\$50,000	20%	17%	20%	25%
\$50-\$75,000	20%	23%	16%	18%
\$75-\$100,000	6%	14%	9%	9%
Over \$100,000	12%	16%	7%	13%
Don't know	1%	--	1%	4%
Refused	6%	10%	11%	7%

○ = 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	2%	2%	3%	1%
High school graduate	20%	17%	35%	24%
Some college	36%	28%	23%	24%
Undergraduate college degree	21%	25%	19%	18%
Some graduate school	4%	5%	5%	5%
Completed graduate school	14%	19%	9%	20%
Trade or technical school graduate	2%	4%	7%	7%
Don't know	--	<1%	--	--
Refused	--	<1%	--	1%

Gender	Ad Aware		Ad Non-Aware	
	Pacific Power (n=239)	Rocky Mt. Power (n=267)	Pacific Power (n=170)	Rocky Mt. Power (n=163)
Male	49%	49%	49%	55%
Female	51%	51%	51%	45%

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