



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 Pacific Power and Rocky Mountain Power gauge whether there has been an increase in customer satisfaction and/or company image since the advertising campaign launched earlier this year.
- The study was designed to provide recommendations on adjustments required to strengthen the customer awareness campaign.

Methodology

- A total of seven hundred (n=700) residential customers, evenly divided between Pacific Power and Rocky Mountain Power, were interviewed by telephone between May 21, 2009 and June 3, 2009.
 - A random sample of 29,375 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
- The maximum sampling variability for each customer segment at the 95% confidence level is shown below:
 - Total PacifiCorp customers (n=700) yield a maximum sample variable of +/- 3.7%.
 - Pacific Power customers (n=350) yield a maximum sample variable of +/- 5.2%.
 - Rocky Mountain Power customers (n=350) yield a maximum sample variable of +/- 5.2%.
 - Ad Aware customers (n=400) yield a maximum sample variable of +/- 4.9%.
 - For this research, Ad Aware customers are defined as customers who recalled advertising or communication from their electric utility during the past 6 months.
 - Ad Non-Aware customers (n=300) yield a maximum sample variable of +/- 5.7%.
 - Ad Non-Aware customers did not recall any advertising or communication from their electric utility during the past 6 months.
- All participants were interviewed by Market Decisions’ in-house research associates.



Key Findings

- Unaided, about 84% of residential customers mention Pacific Power or Rocky Mountain Power when asked which electric or gas utilities come to mind (pages 10-11).
 - Top-of-mind and total unaided company awareness is higher among customers who recalled advertisements or communications.
- Two-thirds (66%) of customers recall seeing, hearing, or reading any form of advertisement or communication from Pacific Power or Rocky Mountain Power during the past 6 months (page 13).
 - Unaided advertisement awareness is 45% for Pacific Power customers and 50% for Rocky Mountain Power customers.
- The advertisements/communications from Pacific Power and Rocky Mountain Power have had a positive impact on customer perceptions of the company.
 - A third (30%) of Ad Aware customers say they are more favorable about their electric utility as a result of seeing, hearing or reading the advertisements or communications (page 30).
 - Ad Aware customers are significantly more satisfied with the company than Ad Non-Aware customers (page 25).
- Pacific Power customers most frequently cite “bill insert” (42%) as how they became aware of advertisements or communications from their electric utility company. Rocky Mountain Power customers are most likely to mention “TV” (44%) (page 15).
- The top three most frequently recalled advertising messages are energy efficiency programs, using energy wisely, and renewable energy (page 16).
 - It should be noted that renewable energy is mentioned significantly more frequently by Pacific Power customers than Rocky Mountain Power customers (unaided 37% vs. 20% and aided 54% vs. 39%, respectively).
 - Other regional differences in message recall:
 - Rocky Mountain Power customers mention the following messages more frequently than Pacific Power customers: working to keep your power on and transmission line projects.
 - Pacific Power customers recall messages about preparing for power outages significantly more frequently than Rocky Mountain Power customers.



Key Findings

- The messages most important to customers almost mimic those messages with the highest advertising awareness. The messages customers think are most important for Pacific Power/Rocky Mountain Power to communicate are: electrical safety, using energy wisely, and energy efficiency programs (page 17).
 - Other topics that customers would like to hear about from their utilities are: alternative energy/energy efficiency, billing and payment options, and corporate information (page 20).
- When asked if they recall the message “Let’s Turn the Answers On,” 16% of Pacific Power Ad Aware customers could recall it. For Rocky Mountain Power, significantly more customers recalled the phrase (28%) (page 22).
 - The two most frequently mentioned meanings for “Let’s Turn the Answers On” are: actively looking into and implementing alternative energy and educating the public about all utility practices/answering questions.
- The ads and communications from Pacific Power and Rocky Mountain Power are seen as informative, believable and likeable, but not very entertaining (page 21).
- One in four (24%) Pacific Power and one in three (30%) Rocky Mountain Power customers report having taken action based on the advertisements or communications seen from the company (page 23).
 - The three most frequently mentioned actions taken, mentioned by one in five or more, are: invested in wind power program, shutting off lights/appliances when not in use, and purchased/switched to energy efficient appliances/lights.
- Ad Aware customers are more likely to have been to the company web site than Ad Non-Awares (38% vs. 24%) (page 35).



Ad Aware vs. Ad Non-Aware Customers

- Customers who saw, read or heard advertisements or communications from their electric utility are more positive toward the company.
- The items listed below compare some of the survey responses provided by Ad Aware customers and Ad Non-Aware customers. While not all differences between these customer segments are statistically significant, a trend exists where Ad Aware customers are more favorable than Ad Non-Aware customers across several attributes. The following points support this finding:
 - % **very satisfied overall with company**: 79% Ad Aware vs. 67% Ad Non-Aware (**significantly different**)
 - % who mentioned their electric **utility top-of-mind unaided**:
 - Pacific Power: 77% Ad Aware vs. 62% Ad Non-Aware (**significantly different**)
 - Rocky Mountain Power: 66% Ad Aware vs. 51% Ad Non-Aware (**significantly different**)
 - % who strongly agree **UTILITY has plans to meet future energy needs**: 48% Ad Aware vs. 38% Ad Non-Aware (**significantly different**)
 - % who strongly agree **UTILITY provides reliable and dependable power**: 85% Ad Aware vs. 80% Ad Non-Aware (**not significantly different**)
 - % who strongly agree **UTILITY is committed to keeping customers safe around electricity**: 72% Ad Aware vs. 67% Ad Non-Aware (**not significantly different**)
 - % who strongly agree **UTILITY delivers excellent customer service**: 64% Ad Aware vs. 62% Ad Non-Aware (**not significantly different**)
 - % who strongly agree **UTILITY provides electricity at a reasonable cost**: 46% Ad Aware vs. 44% Ad Non-Aware (**not significantly different**)
 - % who strongly agree **UTILITY has programs to help customers save money**: 46% Ad Aware vs. 41% Ad Non-Aware (**not significantly different**)
 - % who strongly agree **UTILITY has programs that help protect the environment**: 42% Ad Aware vs. 38% Ad Non-Aware (**not significantly different**)
 - % who strongly agree **UTILITY supports my community by being involved in charitable and local events**: 24% Ad Aware vs. 19% Ad Non-Aware (**not significantly different**)



Conclusions and Recommendations

- The customer awareness advertising campaign launched in January 2009, just over four months prior to conducting this survey research. During this relatively short period of time, the campaign has had an initial, positive impact on customers who have seen, heard or read the advertisements and communications:
 - Pacific Power and Rocky Mountain Power customers who recalled the ads are significantly more satisfied with their electric utility, and have stronger unaided brand awareness compared to customers who did not remember the communications.
 - Ad Aware customers have a stronger tendency to provide an actual rating on utility brand image attributes compared to many Ad Non-Awares who provided a “don’t know” response. This suggests the campaign has been effective helping shape images and perceptions of the companies. While most brand image attributes are not significantly different between Ad Awares and Ad Non-Awares, the overall trend shows more positive images held by Ad Awares.
 - The positive perceptions observed among Ad Awares supports customer comments provided at focus groups conducted May 2009 in Salt Lake City, Utah and Bend, Oregon. In that research, a strong majority of customers reacted very favorably to several television ads in terms of creative appeal, information content and images associated with their electric utility.
- In view of the measurable positive impact of the customer awareness campaign, Pacific Power and Rocky Mountain Power should continue funding the communication plans developed for the advertising awareness campaign. Sustaining at least the current level of advertising and customer communications with key messages across a variety of channels will be key to building on the positive outcomes observed in this study. The research indicates that the customer awareness advertising campaign has strong potential to further increase advertising awareness, strengthen brand awareness, improve company image and contribute to higher customer satisfaction.



Conclusions and Recommendations

The following tactics should be considered to solidify and strengthen the campaign:

- Continue the use of television and newspaper advertisements since customers rely heavily on these channels for information on news and current events.
- Bill inserts and the Pacific Power/Rocky Mountain Power Web sites will continue to represent critical avenues for communicating key messages to customers. The company Web sites are especially important to customers under 35 years of age, as this segment is more likely than older customers to use the Web site for information about their utility.
- Highlight the tag line “Let’s Turn the Answers On” in future customer communications. Customers associate the phrase positively with the company with regard to alternative energy, educating the public about utility practices, finding solutions to energy problems and being more receptive to customer needs.
- Work to increase the awareness of the company’s actions taken to promote “electrical safety” and “working to keep your power on.” These attributes are highly important to customers, but they have lower than average awareness relative to other company attributes.
- Continue to reinforce messages that encourage customers to take actions based on their exposure to the customer awareness campaign. Over one-quarter of customers who saw advertisements or communications report making a change such as saving energy or signing up for Blue Sky. These actions provide positive benefits to customers and have a strong potential to improve customer perceptions of Pacific Power and Rocky Mountain Power.



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 (unaided company awareness).
- Advertising awareness was measured by first asking customers “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, then customers were asked “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).
- Customers who recalled advertising or communications are defined as “Ad Aware” while those who did not are categorized as “Ad Non-Aware.”

Top of Mind Unaided Company Awareness

- Ad Aware Pacific Power and Rocky Mountain Power customers are significantly more likely to mention their utility company top-of-mind compared to Ad Non-Aware customers.
- Pacific Power receives higher top-of-mind company recall than Rocky Mountain Power since about one-quarter of Rocky Mountain Power customers mention Mountain Fuel/Questar as their top-of-mind utility.

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%
Pacific Gas & Electric/PG&E	6%	1%	7%	1%
Portland General/PGE	5%	<1%	4%	0%
Northwest Natural	4%	0%	4%	0%
Avista	2%	0%	2%	0%
PacifiCorp	<1%	1%	1%	1%
Mountain Fuel/Questar	0%	22%	0%	25%
Other	5%	7%	4%	7%
None	<1%	1%	16%	12%

*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

- Customers were asked which electric or gas utility comes to mind first (top-of-mind) and which other utilities come to mind. The two questions combined yield total unaided awareness.
- Ad Aware customers have significantly higher utility awareness than those Ad Non-Aware:
 - Pacific Power Ad Aware customers are significantly more likely to be aware of Pacific Power and Northwest Natural than Pacific Power Ad Non-Aware customers.
 - Rocky Mountain Ad Aware customers are significantly more likely to be aware of Rocky Mountain Power and Mountain Fuel/Questar than Ad Non-Aware customers.

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%
Northwest Natural	20%	0%	4%	1%
Pacific Gas & Electric/PG&E	12%	3%	12%	1%
Portland General/PGE	10%	1%	9%	0%
Avista	9%	0%	9%	0%
Rocky Mountain Power/Utah Power	1%	90%	1%	74%
PacifiCorp	1%	2%	1%	2%
Mountain Fuel/Questar	0%	63%	1%	51%
Other	25%	17%	16%	14%
None	41%	25%	52%	42%

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

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

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

Unaided Advertisement Awareness

- Unaided, approximately half of Pacific Power and Rocky Mountain Power customers recall an advertisement or communication from their electrical company during the past six months.
- Nearly 40% of Rocky Mountain Power customers have unaided recall of Mountain Fuel/Questar advertisements, and 10% of Pacific Power customers mention Northwest Natural.

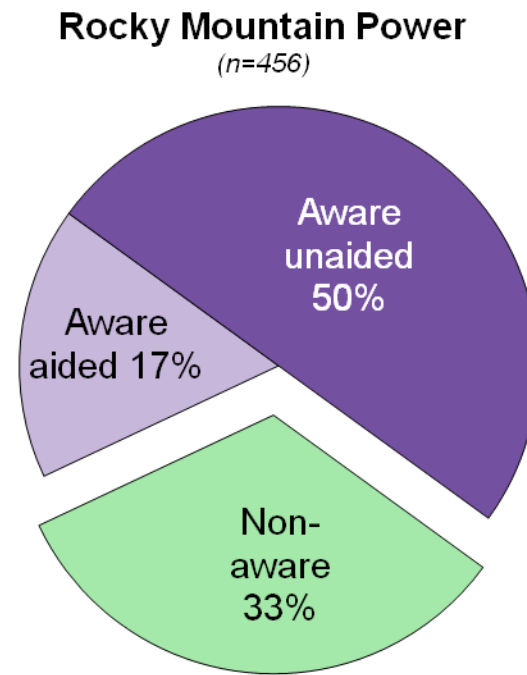
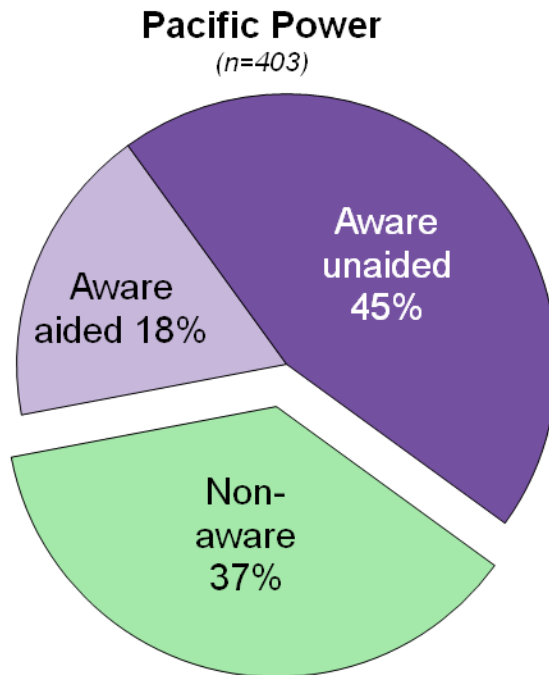
Unaided Ad Awareness	Pacific Power (n=403)	Rocky Mt. Power (n=456)
Pacific Power/PPL	45%	1%
Northwest Natural	10%	0%
Avista	5%	0%
Pacific Gas & Electric/PG&E	5%	<1%
Portland General/PGE	4%	0%
PacifiCorp	<1%	<1%
Mountain Fuel/Questar	0%	39%
Rocky Mountain Power/Utah Power	0%	50%
Other	7%	9%
None	45%	34%

*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

- Total advertising recall combines unaided recall (previous page) and aided recall of advertisements or communications during the past 6 months.
- In total, two-thirds (67% Rocky Mountain Power and 63% Pacific Power) of customers are aware of the company's advertisements or communications. The majority of advertising recall is unaided.
- Younger customers (18-34) and women are most likely to recall the Pacific Power and Rocky Mountain Power advertisements.



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?



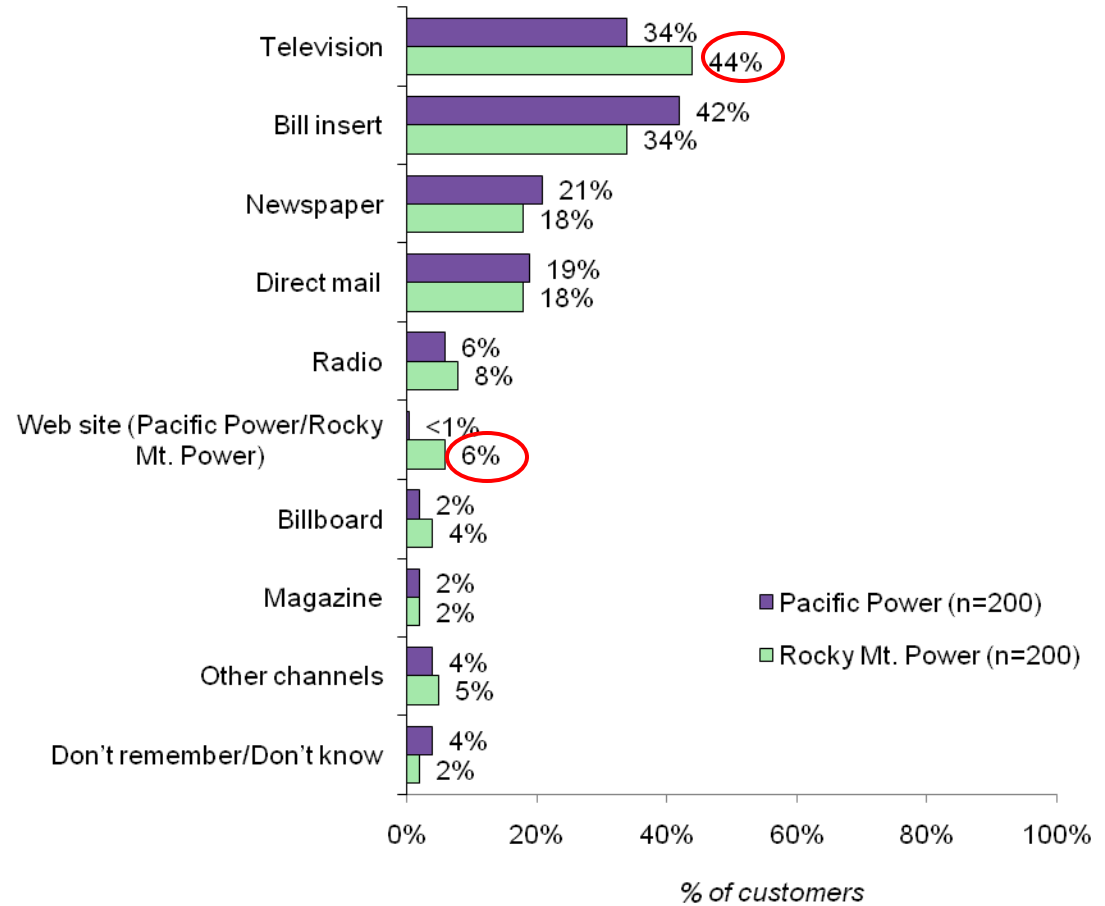
Advertising & Communication Recall

- The following section presents the study's findings on customer 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 series of questions presented in this section.

Advertising & Communication Channels

- Television and bill inserts are the most frequently mentioned channels for advertisements and communications.
- Rocky Mountain Power customers are more likely than Pacific Power customers to remember ads through television and their electric utility's Web site.
- Customers in the 55 or older category more commonly mention bill inserts and newspaper; utility Web site receives stronger mention by 18-34 year olds.

Advertising & Communication Channels



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

 = significantly higher than other utility

Q5 Where did you see, hear or read these advertisements or communications from UTILITY?

Unaided & Aided Message Recall

- Customers cited messages they recalled from advertisements or communications on both an aided and unaided basis (unaided + aided = total message recall).
- “Renewable energy”, “energy efficiency programs” and “using energy wisely” are the most widely recalled advertising and communication messages.
- Rocky Mountain Power customers are significantly more likely to recall messages about *energy efficiency programs* (unaided), *working to keep the power on* (aided), *transmission line projects* (aided), and *planning for your future energy needs* (unaided) than Pacific Power customers.
- Pacific Power customers are significantly more likely to recall messages with content about *renewable energy/environmentally friendly* (unaided and aided) and *preparing for power outages* (aided).

Messages Recalled	Pacific Power (n=200)		Rocky Mt. Power (n=200)	
	Unaided	Total	Unaided	Total
Renewable energy/environmentally friendly	37%	54%	20%	39%
Energy efficiency programs ← <i>Highest aided recall</i>	19%	60%	31%	52%
Using energy wisely ← <i>Second highest aided recall</i>	14%	56%	18%	50%
Electrical safety	10%	42%	8%	36%
Programs such as equal pay/customer guarantees	10%	31%	9%	34%
Working to keep your power on	3%	27%	4%	37%
Transmission line projects	1%	12%	2%	20%
Preparing for power outages	1%	42%	2%	31%
Planning for your future energy needs	1%	34%	5%	36%
Other messages	5%	n/a	3%	n/a
Don't remember/Don't know	30%	4%	32%	5%

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

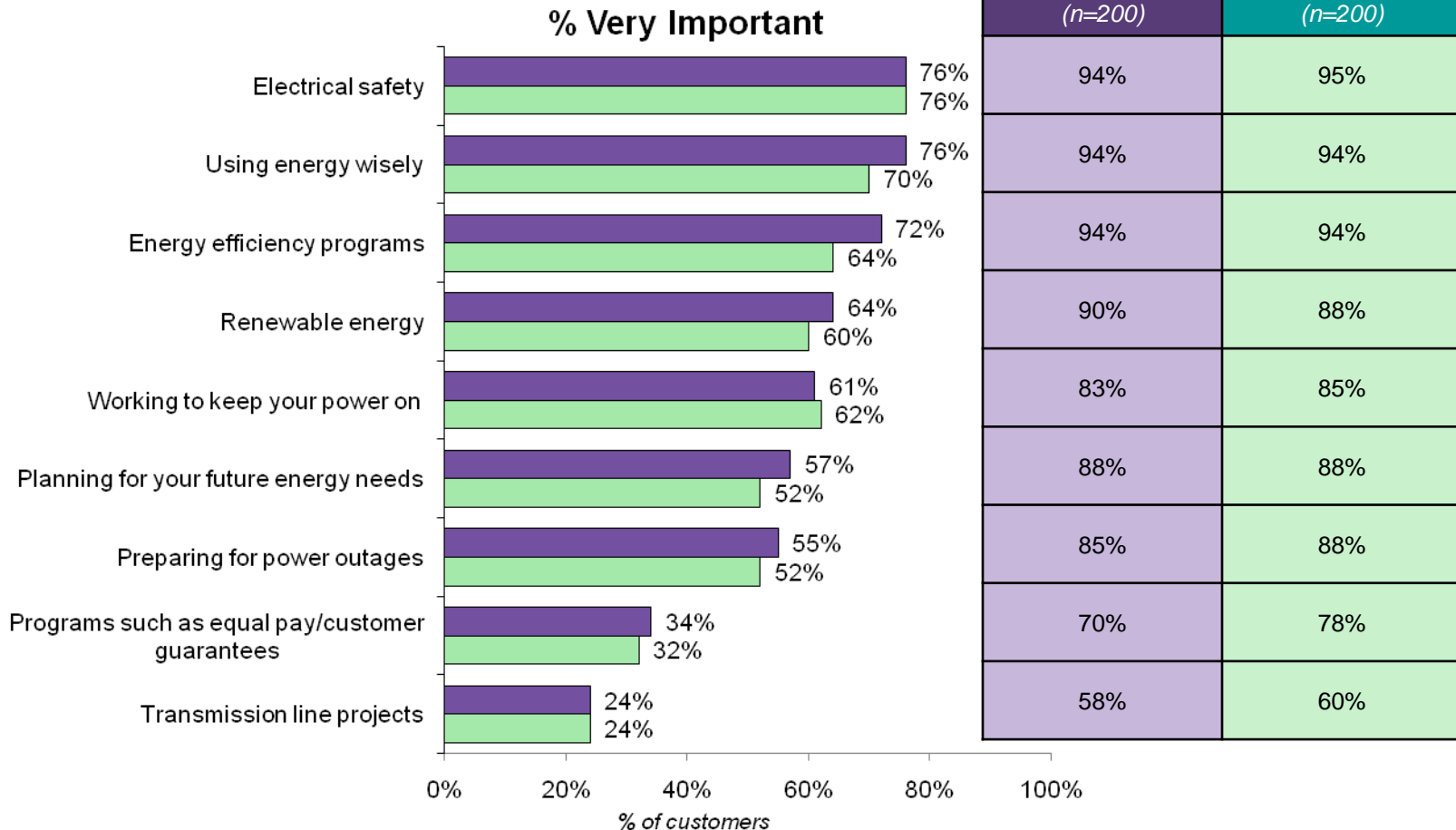
Q7 Do you remember any of the following messages or topics from the UTILITY advertisements or communications?

○ = significantly higher than other utility

n/a = not asked aided

Importance of Communication Messages

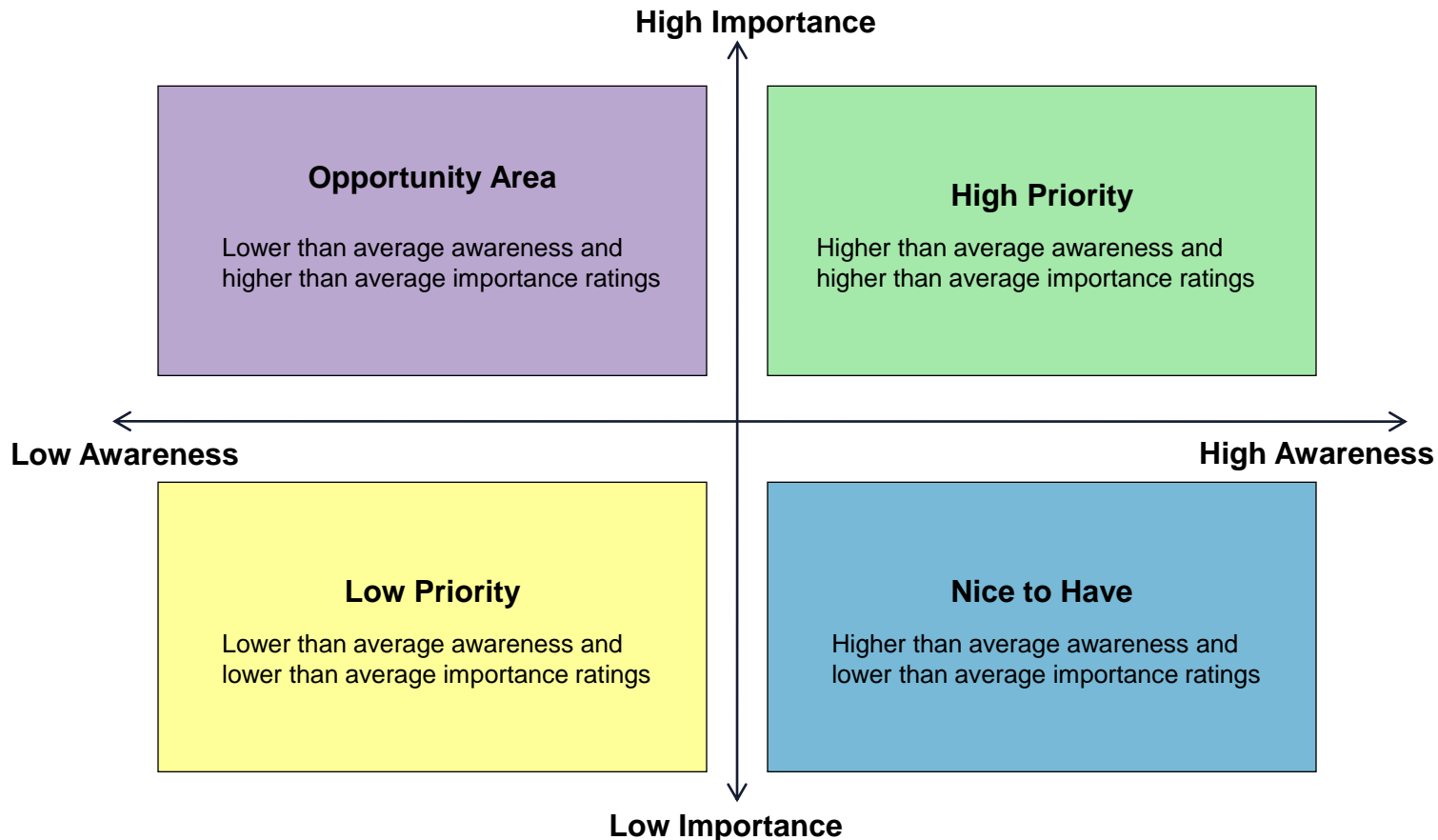
- “Electrical safety,” “using energy wisely,” and “energy efficiency programs” are the messages most important to customers.



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?

Message Importance & Awareness Gap Analysis

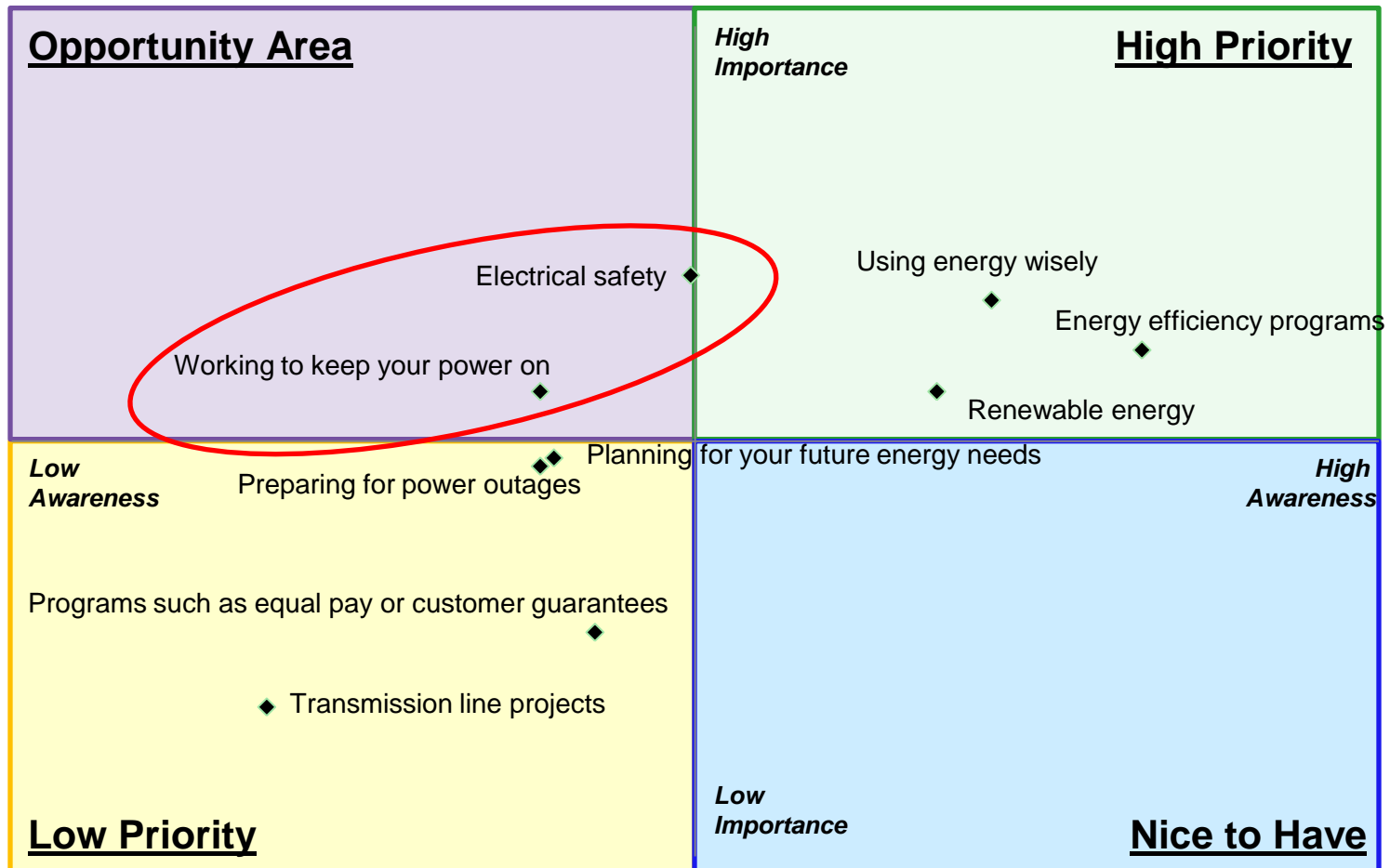
- The following slide presents a quadrant chart outlining the relative importance of each advertising message and the relative awareness of each message.
- Messages considered highly important, but with low awareness, indicate opportunity areas for Pacific Power and Rocky Mountain Power. Increasing awareness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



Message Awareness vs. Importance Ratings

- The messages *electrical safety* and *working to keep your power on* have higher than average importance, but lower than average awareness, indicating an opportunity to focus on raising awareness of these messages.

Awareness vs. Importance Ratings



Additional Suggested Messages

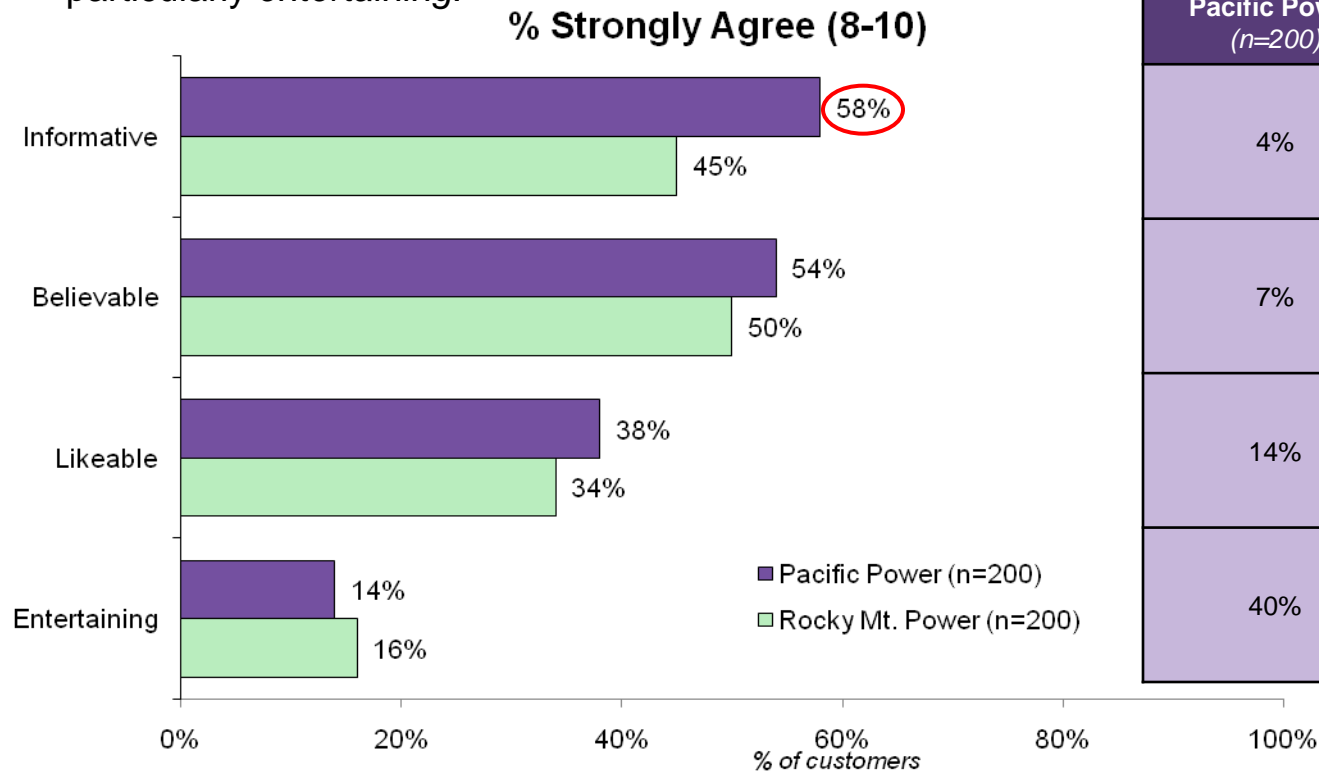
- Besides the nine messages tested on page 16, customers were asked if there are any other messages or topics their electric utility should be communicating to customers.
- Information about “alternative energy/energy efficiency” and “billing and payment programs” surfaced as important topic areas customers would like to hear about from their utility.

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

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

Perception of Advertisements & Communications

- Overall, the advertisements and communications are perceived to be *informative*, *believable*, and *likeable*, but not particularly *entertaining*.



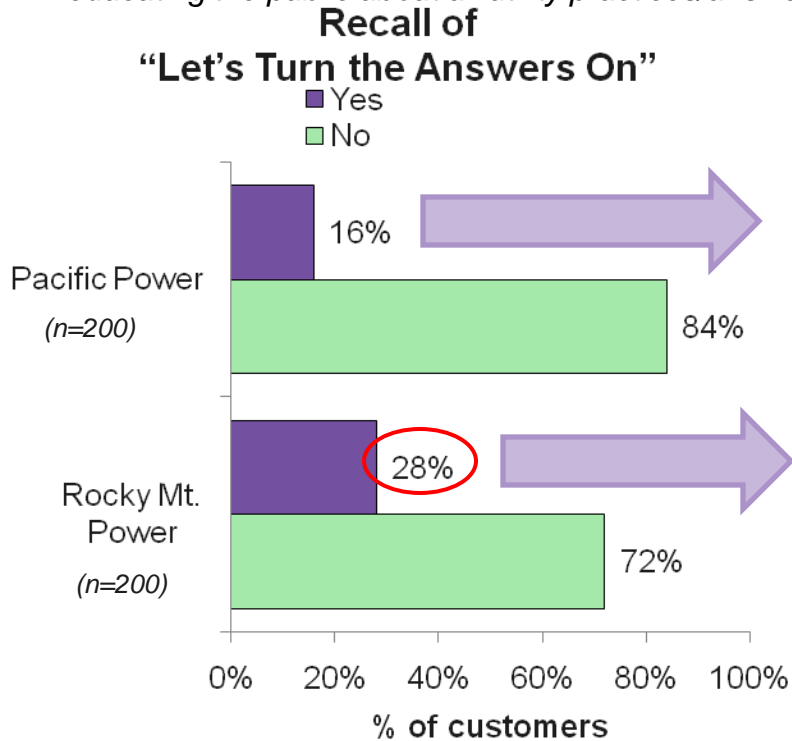
% Strongly Disagree (0-4)	
Pacific Power (n=200)	Rocky Mt. Power (n=200)
4%	5%
7%	8%
14%	14%
40%	39%

58% = 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”

- Among all Ad Aware customers, just under one-quarter (23%) remember the phrase “Let’s Turn the Answers On.”
- Rocky Mountain Power customers are significantly more likely than Pacific Power to recall “Let’s Turn the Answers On.”
- Most frequently the phrase “Let’s Turn the Answers On” is interpreted as the company *actively looking into and implementing alternative energy*.
- Rocky Mountain Power customers are more likely than Pacific Power customers to interpret the phrase to mean *educating the public about all utility practices/answering questions and finding solutions to energy problems*.



What does “Let’s Turn the Answers On” mean to you?	Pacific Power (n=32)	Rocky Mt. Power (n=55)
Actively looking into and implementing alternative energy	41%	36%
Educating the public about all utility practices/answering questions	22%	40%
Finding solutions to energy problems (general)	12%	33%
Being more receptive to the needs of customers	25%	22%
Being a more proactive company	6%	5%
Implementing better safety protocols	0%	9%
Other	9%	4%
Don't remember/Don't know	16%	7%

Q11A. Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

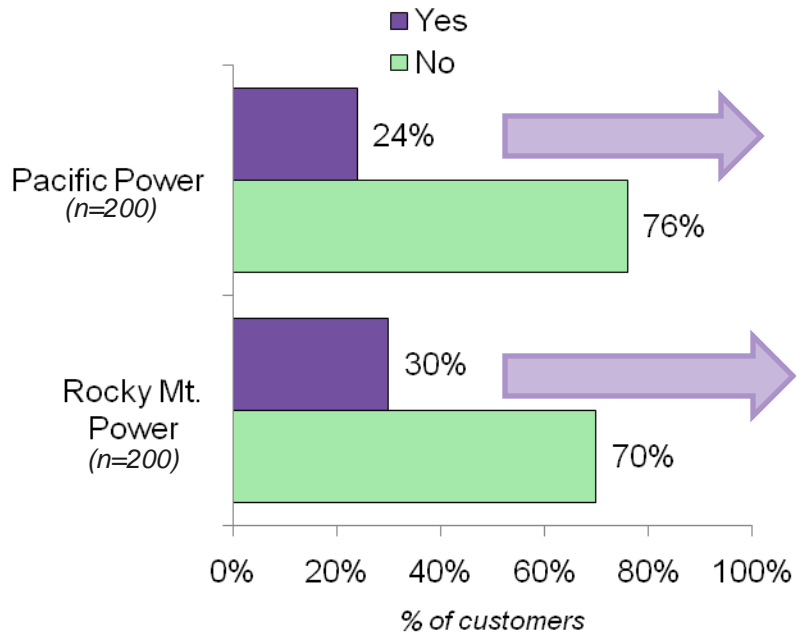
Q11B. In the UTILITY ad, what does “Let’s Turn the Answers On” mean to you?

 = significantly higher than other utility

Persuasiveness of Advertisement in Call to Action

- Overall, about one-quarter (27%) of Ad Aware customers report taking some action based on the advertisements or communications.
- Among the customers persuaded to take action based on the ads, “invested in wind power/Blue Sky program” is the most frequently mentioned action by Pacific Power customers and “shutting off lights/appliances when not in use” is the top item for Rocky Mountain customers. Other frequent actions include “purchased/switched to energy efficient appliances/lights” and “more aware of power usage.”

Took Action Based on Advertisement

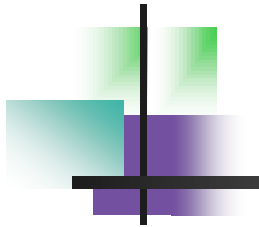


Actions taken from seeing the ads or communications	Pacific Power (n=49)	Rocky Mt. Power (n=59)
Invested in the wind power/Blue Sky program	38%	27%
Shutting off lights/appliances when not in use	33%	47%
Purchased/switched to energy efficient appliances/lights	24%	25%
More aware of power usage (general)	18%	19%
Enlisting in utility incentive/rebate programs	4%	15%
Changing daily usage of appliances	12%	8%
Enlisted in utility financial aid services	10%	7%
Installing insulation	6%	7%
More cautious about energy safety	6%	5%
Seeking the advice of the utility company	8%	2%
Not using power strips	0%	3%
Other	2%	2%
Don't remember/Don't know	0%	2%

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?

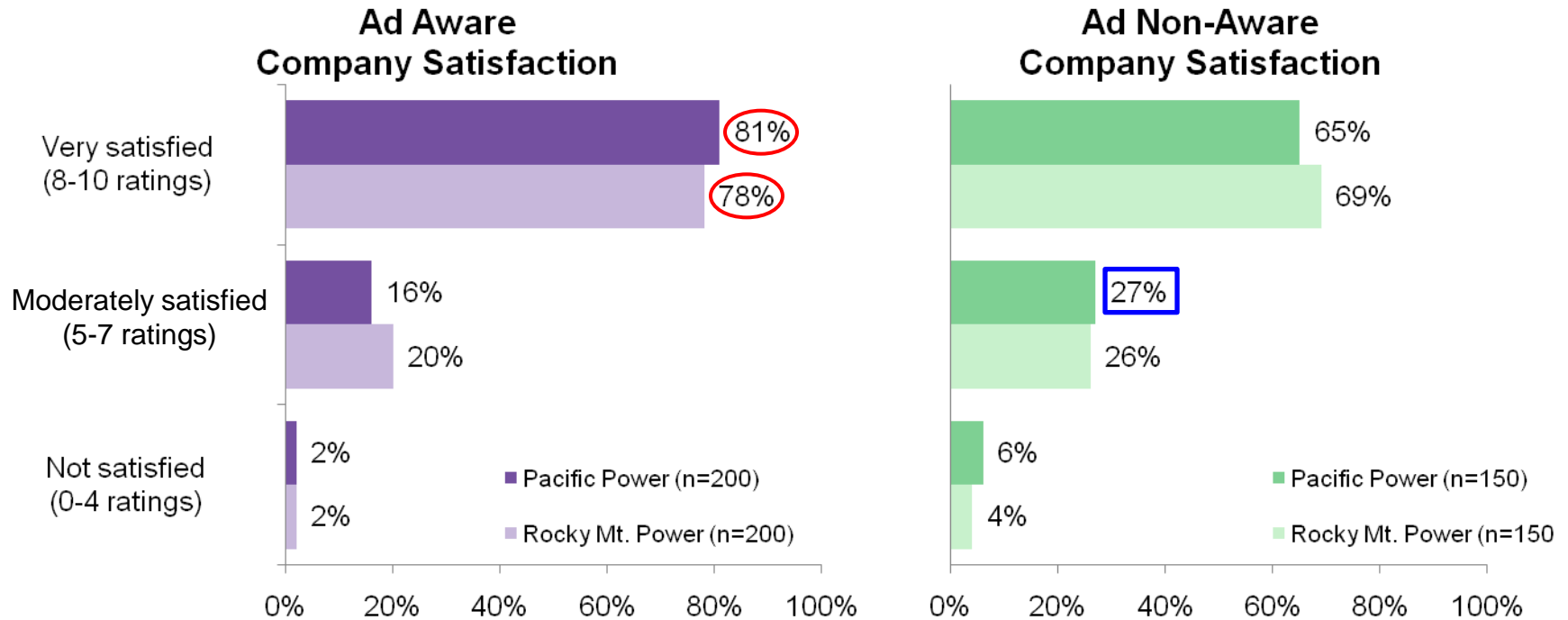
15% = significantly higher than other utility



Impact of Advertisements and Communications on Customer Satisfaction & Company Image

Advertisements' Impact on Company Satisfaction

- Both Pacific Power and Rocky Mountain Power Ad Aware customers are significantly more satisfied with their electric utility company than Ad Non-Aware customers.
- Pacific Power and Rocky Mountain Power residential customers are equally satisfied with their utility.

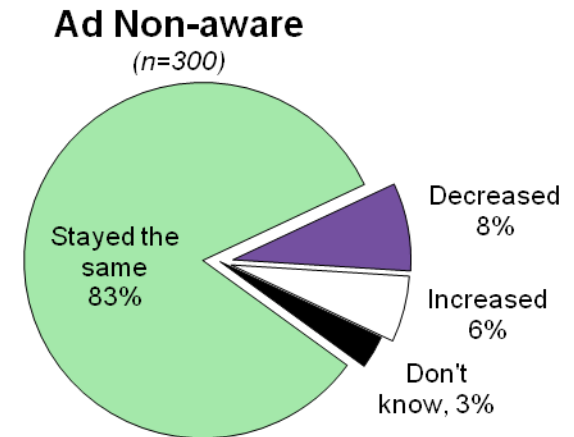
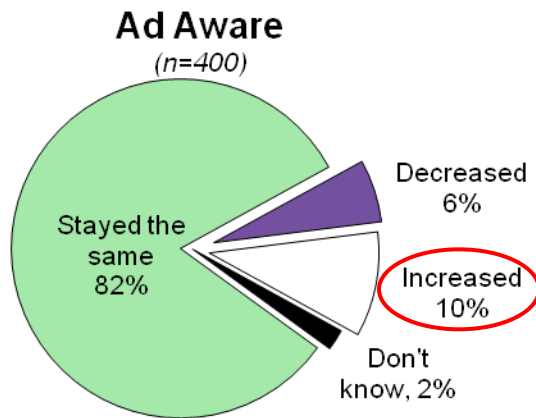


Q16. Now I'm going to ask some questions about your satisfaction with UTILITY. First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

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

Satisfaction Comparison With Last Year

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



Why has your satisfaction increased?	Ad Aware (n=40)*	Ad Non-Aware (n=19)*
Good reliable electrical service	25%	52%
Quality of customer service	30%	19%
Decreased rates/usage	16%	9%
Efforts toward energy conservation	18%	0%
Billing services/assistance	12%	12%
Increased familiarity	9%	15%
Other	15%	0%

Why has your satisfaction decreased?	Ad Aware (n=23)*	Ad Non-Aware (n=25)*
Increased cost/rates	65%	91%
Poor service	16%	21%
Billing services/assistance	18%	8%
Quality of customer service	14%	8%
Many service interruptions	12%	9%
Other	9%	3%

***CAUTION: small sample sizes.**

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

Q18. And why do you say your satisfaction has increased/decreased?

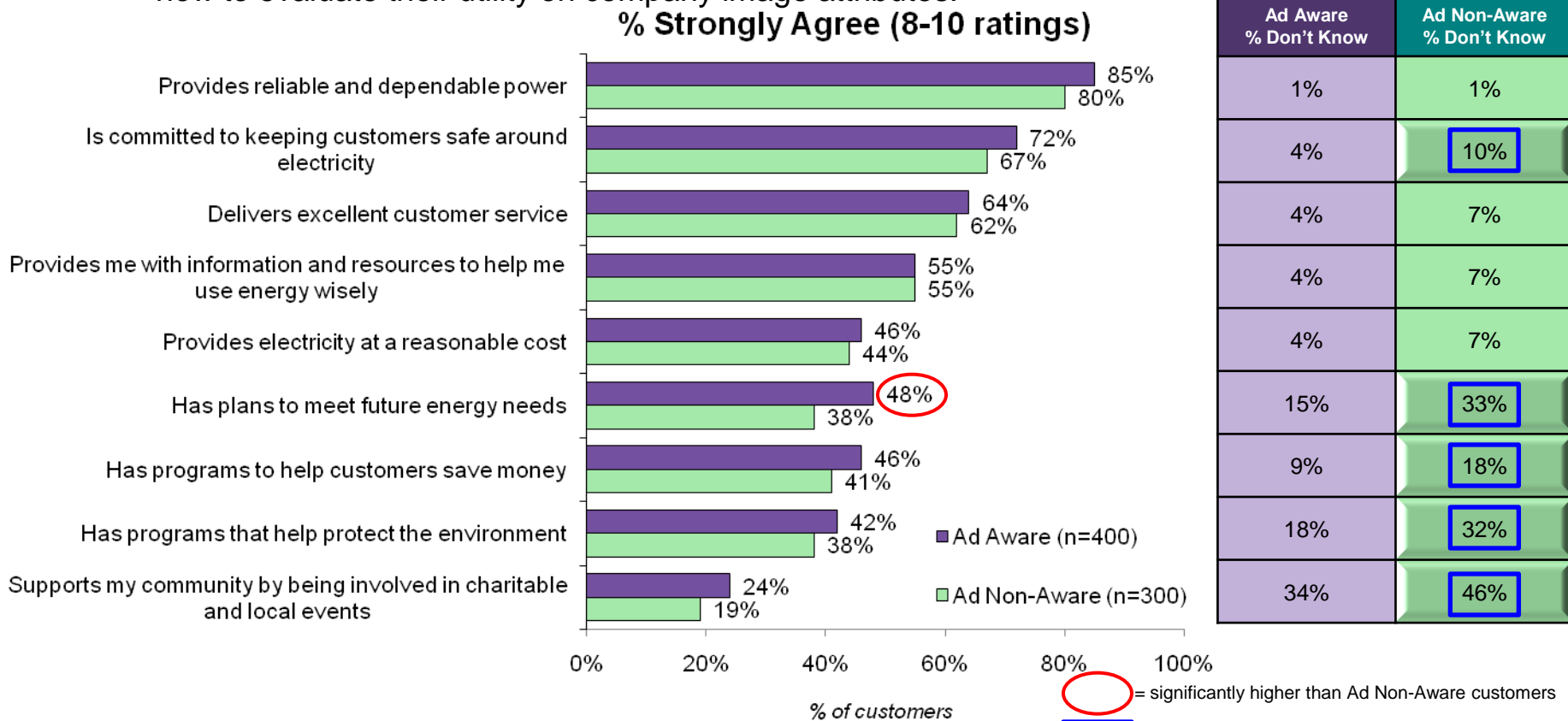


Company Image Evaluation

- Customers 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:
 - Planning for future energy needs
 - Has programs to help customers save money
 - Has programs that help protect the environment
 - Supports my community by being involved in charitable and local events
- **Ad Aware customers tend to be more positive toward their utility**, while those Ad Non-Aware are more likely to have no opinion.
 - Additionally, those who recall the slogan “Let’s turn the answers on” are more likely to agree with all image statements about their utility.
- 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

- Ad Aware customers are significantly more likely than those Ad Non-Aware to agree that their utility *has plans to meet future energy needs*.
- Ad Non-Aware customers are significantly more likely than those Ad Aware to say they “don’t know” how to evaluate their utility on 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

(by Utility & Ad Awareness)

- Pacific Power Ad Aware customers are more likely than Rocky Mountain Power Ad Aware customers to agree that their electric utility “provides information to help use energy wisely” and “has programs that help protect the environment.”
- Pacific Power Ad Aware customers are more likely than Pacific Power Ad Non-Aware to agree that the utility “has plans to meet future energy needs” and “has programs that help protect the environment.”

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	86%	84%	83%	79%
Is committed to keeping customers safe around electricity	74%	71%	70%	65%
Delivers excellent customer service	65%	62%	68%	58%
Provides me with information and resources to help me use energy wisely	62%	50%	57%	53%
Provides electricity at a reasonable cost	42%	48%	45%	44%
Has plans to meet future energy needs	50%	46%	37%	39%
Has programs to help customers save money	48%	46%	43%	39%
Has programs that help protect the environment	49%	37%	39%	37%
Supports my community by being involved in charitable and local events	26%	23%	19%	18%

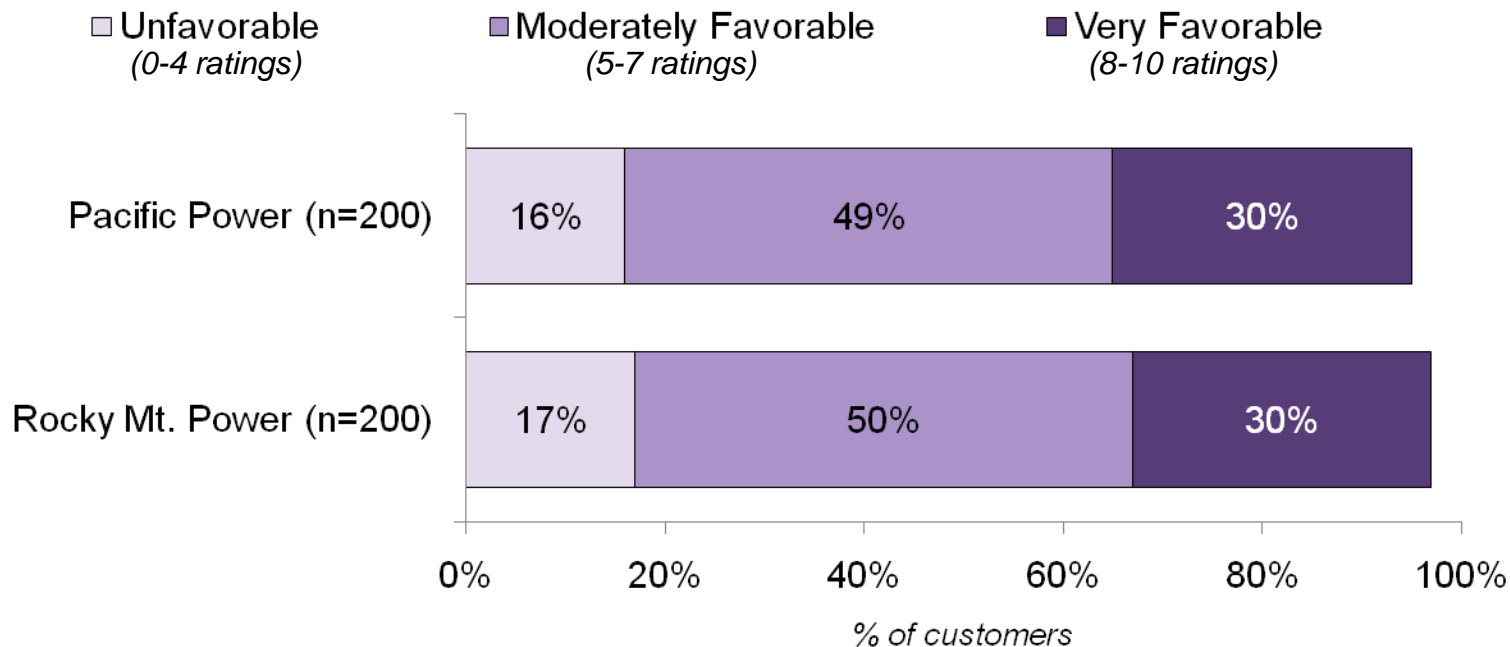
Q19. Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

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

Advertisement's Impact on Company Image

- One third of Ad Aware customers say that the ads have “very favorably” affected their opinion of their electric utility, while half rate the impact as “moderately favorable.”

Advertisement's 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

Very Favorable (8-10 rating) <i>(n=121)</i>	Moderately Favorable (5-7 rating) <i>(n=199)</i>	Least Favorable (0-4 rating) <i>(n=65)</i>
49% Utility has positive business practices/operations	34% Rarely see ad/do not affect me/not useful/not necessary	70% Rarely see ad/do not affect me/not useful/not necessary
29% Advertisement serves as education to consumers	20% Utility has positive business practices/operations	20% Limited choice in utility provider/monopoly
25% Information is useful to energy habits/usage	11% Limited choice in utility provider/monopoly	14% Misleading/fluctuating costs
15% Offer incentives/financial programs	9% Information is useful to energy habits/usage	12% Not convinced of the information given
15% Information on energy savings/bill minimizing practices	8% Offer incentives/financial programs	
12% Efforts toward renewable/alternative energy	8% Advertisement serves as education to consumers	
	7% Efforts toward renewable/alternative energy	

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

Q15. And why do you give a rating of (ANSWER IN Q14)?

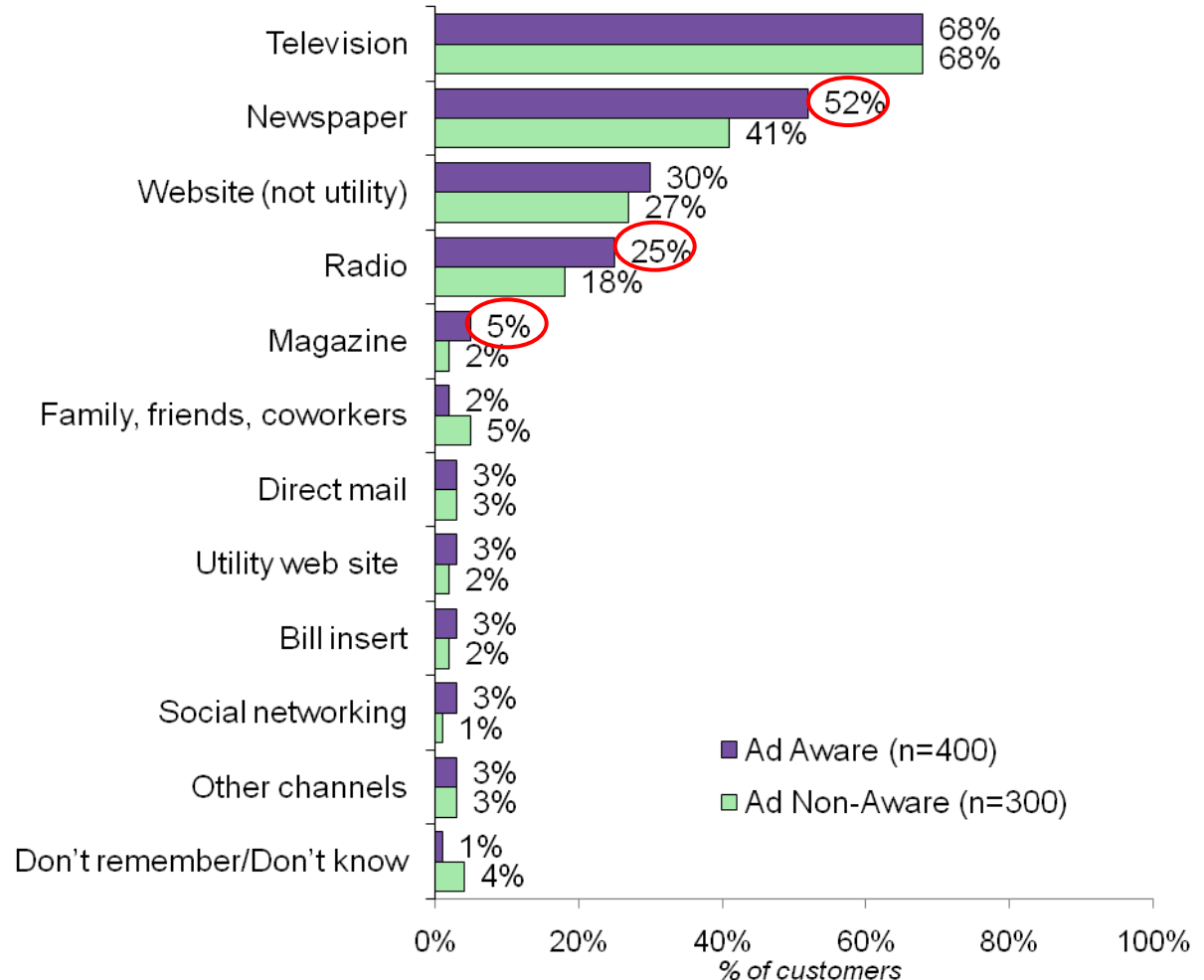


Communication Sources

News & Current Event Sources

- Television and newspapers are the primary sources for news and current events.
- Ad Aware customers are more likely to utilize newspaper, radio and magazines as news sources.
- Customers age 35 or older favor traditional information channels (television and newspapers) while younger customers (age 18-34) are significantly more likely to mention Web sites (not utility).

Advertising & Communication Channels



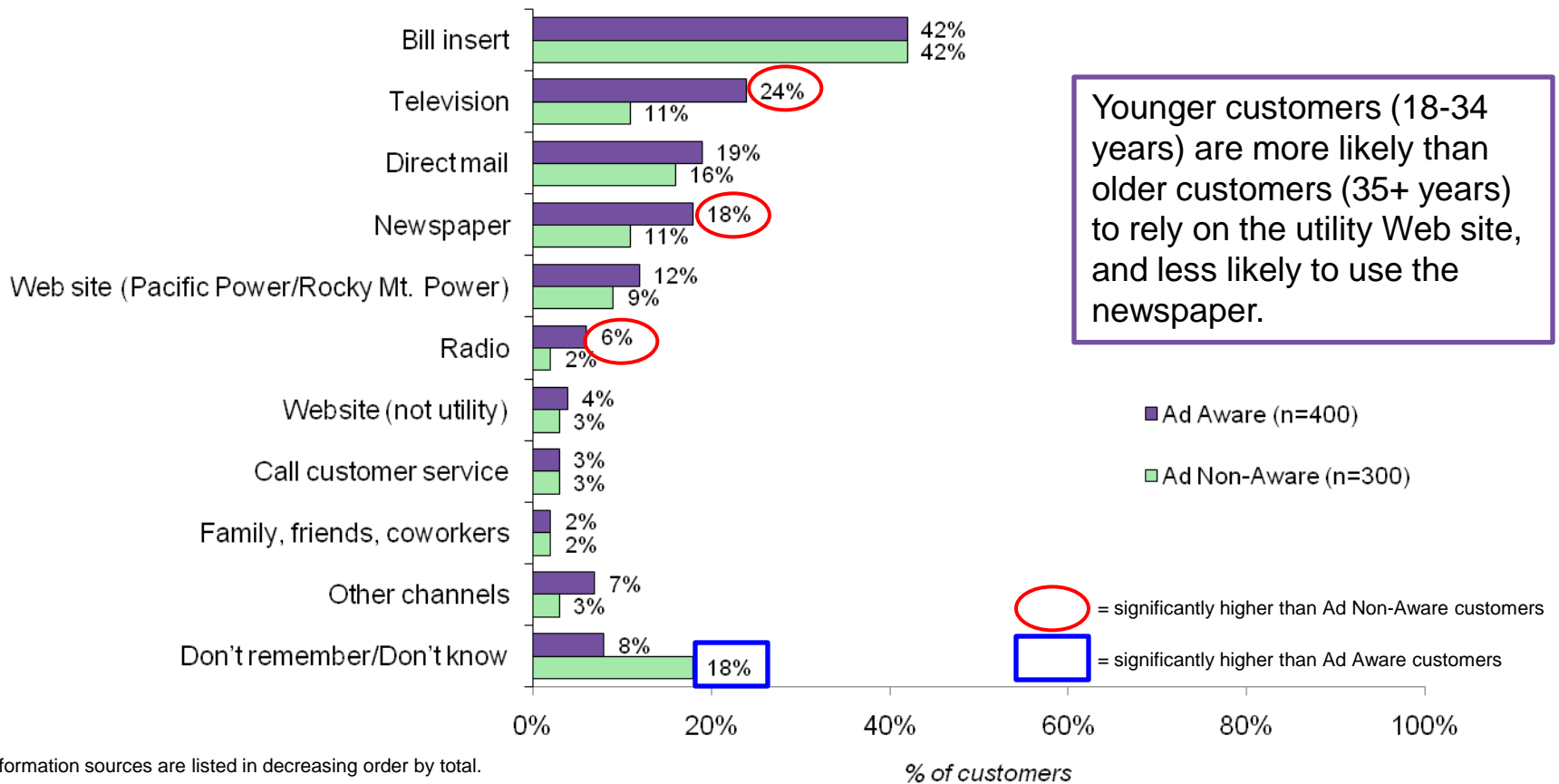
= significantly higher than Ad Non-Aware customers

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

Utility Information Sources

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

Advertising & Communication Channels

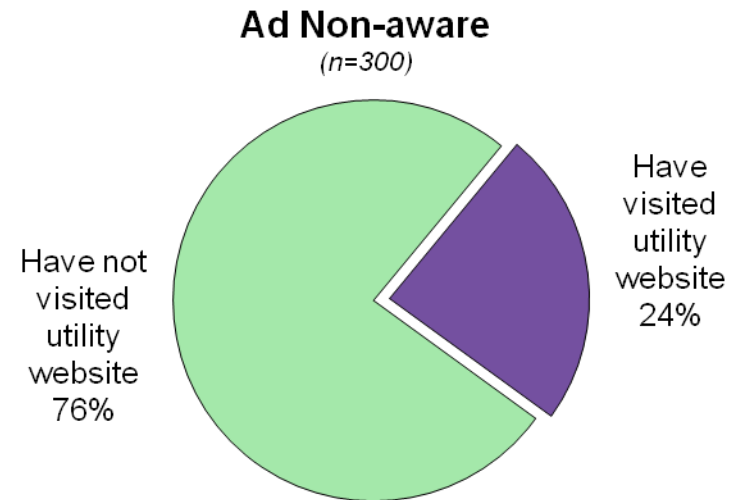
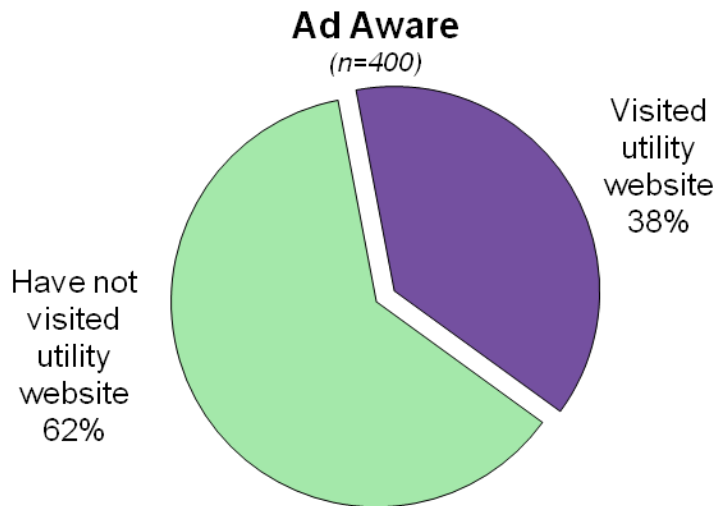


Younger customers (18-34 years) are more likely than older customers (35+ years) to rely on the utility Web site, and less likely to use the newspaper.

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

Visiting Electric Utility Website

- More than one-third of those Ad Aware and one-quarter of those Ad Non-Aware have visited their electric utility's website.



Q22. Have you ever visited the UTILITY website?



Demographics

Demographics

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

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	15%	23%	16%	25%
5-9 years	16%	20%	12%	16%
10-14 years	8%	11%	13%	14%
15-19 years	8%	8%	11%	7%
20-24 years	7%	6%	7%	7%
25-29 years	4%	8%	5%	6%
30-39 years	18%	8%	15%	13%
40-49 years	9%	8%	12%	7%
50+ years	12%	8%	10%	6%

Average Monthly Utility Bill	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 \$30	4%	10%	3%	10%
\$30-\$50	18%	25%	21%	21%
\$51-\$75	18%	21%	16%	24%
\$76-\$100	23%	20%	19%	17%
Over \$100	33%	20%	29%	17%
Don't know	2%	3%	8%	8%
Refused	2%	1%	3%	4%

Demographics

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

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	17%	34%	13%	21%
35-54	31%	30%	25%	31%
55+	50%	35%	60%	45%
Refused	2%	<1%	3%	3%

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	10%	6%	13%	8%
\$15-\$30,000	20%	16%	16%	13%
\$30-\$50,000	22%	20%	16%	21%
\$50-\$75,000	16%	26%	15%	17%
\$75-\$100,000	9%	14%	11%	11%
Over \$100,000	7%	10%	6%	9%
Don't know	2%	0%	1%	5%
Refused	16%	8%	22%	15%

Demographics

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

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	8%	2%	4%	4%
High school graduate	18%	18%	28%	23%
Some college	30%	32%	31%	26%
Undergraduate college degree	20%	22%	9%	19%
Some graduate school	4%	8%	9%	3%
Completed graduate school	12%	12%	14%	17%
Trade or technical school graduate	6%	5%	1%	3%
Don't know	<1%	0%	0%	0%
Refused	2%	1%	3%	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	37%	49%	48%	48%
Female	63%	51%	52%	52%