



Customer Awareness Advertising Campaign Research

Pacific Power and Rocky Mountain Power

Prepared by

Marlene Holm & Jakob Lahmers
Market Decisions Corporation
(503) 245-4479

Marlene@mdcresearch.com

JakobL@mdcresearch.com



Table of Contents

▪ Research Objectives & Methodology	3	▪ Impact of Advertisements and Communications on Customer Satisfaction & Company Image	38
▪ Key Findings	4	▪ Advertisements' Impact on Company Satisfaction	39
▪ 2010 vs. 2009: Ad Aware Customers	7	▪ Satisfaction Comparison With Last Year	42
▪ 2010 vs. 2009: Ad Non-Aware Customers	8	▪ Company Image Evaluation	45
▪ Ad Aware vs. Ad Non-Aware Customers	9	▪ Advertisement's Impact on Company Image	49
▪ Next Steps	10	▪ Rationales for Company Favorability Ratings	50
▪ Company & Advertising Awareness	11	▪ Communication Sources	51
▪ Top of Mind Unaided Company Awareness	12	▪ News & Current Event Sources	52
▪ Total Unaided Company Awareness	14	▪ Utility Information Sources	54
▪ Unaided Advertisement Awareness	16	▪ Visiting Electric Utility Website	56
▪ Total Advertisement Awareness	18	▪ Oregon Energy Efficiency Programs	57
▪ Advertising & Communication Recall	20	▪ Awareness of Energy Efficiency Programs	58
▪ Advertising Exposure Recall	21	▪ Energy Trust of Oregon	59
▪ Advertising & Communication Channels	22	▪ Washington Energy Efficiency Programs	60
▪ Unaided & Aided Message Recall	24	▪ Awareness of Energy Efficiency Programs	61
▪ Importance of Communication Messages	26	▪ Program Awareness & Participation	62
▪ Message Importance & Awareness Gap Analysis	28	▪ Demographics	63
▪ Additional Suggested Messages	31		
▪ Perception of Advertisements & Communications	32		
▪ "Let's Turn the Answers On"	34		
▪ Persuasiveness of Advertisement in Call to Action	36		



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 second wave, conducted in May and June 2010.

Methodology

- A total of seven hundred thirty-eight (n=738) residential customers, evenly divided between Pacific Power and Rocky Mountain Power, were interviewed by telephone between May 20, 2010 and May 26, 2010 and June 18, 2010 and June 21, 2010.
 - A list of 29,718 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=738) yield a maximum sample variable of +/- 3.6%.
 - Pacific Power customers (n=370) yield a maximum sample variable of +/- 5.1%.
 - Rocky Mountain Power customers (n=368) yield a maximum sample variable of +/- 5.1%.
 - Ad Aware customers (n=438) yield a maximum sample variable of +/- 4.7%.
 - 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, 87% of residential customers mention Pacific Power or Rocky Mountain Power when asked which electric or gas utility comes to mind. This is consistent with 2009 findings (88%).
 - Top-of-mind company awareness is higher among customers who recalled advertisements or communications.
- Roughly six in ten Pacific Power (57%) and two thirds of Rocky Mountain Power (66%) customers recall seeing, hearing, or reading any form of advertisement or communication from Pacific Power or Rocky Mountain Power during the past 6 months. This is down slightly from 2009 (63% Pacific Power; 67% Rocky Mountain Power).
 - Among Ad Aware customers, Rocky Mountain Power customers indicate that they were exposed to 14 ads on average, compared to 9 among Pacific Power customers.
 - Those seeing the ads more frequently are more likely to see them on TV, recall the slogan “Let’s Turn the Answers On” and recall the messages “working to keep your power on” and “transmission line projects.”
- The advertisements/communications from Pacific Power/Rocky Mountain Power have had a positive impact on customer perceptions of the company.
 - One third (36% Pacific Power; 34% Rocky Mountain Power) of Ad Aware customers say they are more favorable about their electric utility.
 - In addition, Ad Aware customers are significantly more satisfied with the company than Ad Non-Aware customers.
- Pacific Power and Rocky Mountain Power customers most frequently cite “television” as how they became aware of advertisements or communications from their electric utility company.
 - Mentions of “TV” have increased significantly since 2009 (Pacific Power: 49% 2010 vs. 34% 2009; Rocky Mountain Power: 69% vs. 44%).



Key Findings

- The top three most frequently recalled messages are energy efficiency programs, using energy wisely, and renewable or alternative energy.
 - Renewable or alternative energy is significantly more likely to be mentioned unaided by Pacific Power customers than Rocky Mountain Power customers (20% vs. 7%, respectively).
 - Among Pacific Power customers, aided recall of energy efficiency programs has decreased significantly since 2009 (50% 2010 vs. 60% 2009).
 - Among Pacific Power customers, aided recall of renewable or alternative energy has decreased significantly since 2009 (41% 2010 vs. 54% 2009).
 - Among Rocky Mountain Power customers, unaided recall of renewable or alternative energy has decreased significantly since 2009 (7% 2010 vs. 16% 2009).
- The messages most important to customers are in line with the messages with the highest advertising awareness. These messages include: electrical safety, using energy wisely, working to keep your power on and energy efficiency programs.
 - Although the percentage suggesting “other” topics is down from last year, the most commonly mentioned topics include: alternative energy/energy efficiency, billing and payment, and corporate information.
- When asked if they recall the message “Let’s Turn the Answers On,” 22% of Pacific Power Ad Aware customers could recall it. For Rocky Mountain Power, significantly more customers recalled the phrase (42%), and the percentage recalling has increased significantly since last year (28%).
- The perception of ads and communications from Pacific Power and Rocky Mountain Power remains useful, informative, believable and likeable. However, the percentage of Pacific Power customers who strongly agree the ads are informative has declined since 2009 (46% 2010 vs. 58% 2009).



Key Findings

- One in five (22%) Pacific Power and one in three (30%) Rocky Mountain Power customers report having taken action based on the advertisement or communication seen from the company. This is consistent with last year's findings.
 - The three most frequently mentioned actions taken, mentioned by one in five or more, are: purchased/switched to energy efficient appliances/lights, shutting off lights/appliances when not in use, and becoming more aware of power usage.
- Ad Aware customers are more likely to have been to the company web site than Ad Non-Aware (41% vs. 25%).



2010 vs. 2009: Ad Aware Customers

Ad Aware Customers Differences between 2010 & 2009	2010	2009
% very satisfied overall with company	73%	79%
Company awareness (aided + unaided): Pacific Power	87%	90%
Company awareness (aided + unaided): Rocky Mountain Power	87%	90%
Unaided company awareness: Pacific Power	77%	77%
Unaided company awareness: Rocky Mountain Power	70%	66%
% who see, hear or read <i>UTILITY</i> advertisements via TV	61%	40%
% who see, hear or read <i>UTILITY</i> advertisements via bill inserts	19%	37%
% who see, hear or read <i>UTILITY</i> advertisements via direct mail	10%	18%
% who recall message of renewable or alternative energy (unaided)	13%	21%
% who strongly agree messages are informative	47%	51%
% who recall "Let's Turn the Answers On"	33%	23%

RED = significant increase
 BLUE = significant decrease



2010 vs. 2009: Ad Non-Aware Customers

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

BLUE = significant decrease



Ad Aware vs. Ad Non-Aware Customers

2010 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% very satisfied overall with company	73%	63%
% who say satisfaction has increased compared to a year ago	11%	5%
% who strongly agree <i>UTILITY</i> provides reliable and dependable power	81%	72%
% who strongly agree <i>UTILITY</i> has programs to help customers save money	47%	35%
% who strongly agree <i>UTILITY</i> supports my community by being involved in charitable and local events	27%	19%
% who strongly agree <i>UTILITY</i> delivers excellent customer service	65%	58%
% who strongly agree <i>UTILITY</i> provides electricity at a reasonable cost	48%	40%
% who strongly agree <i>UTILITY</i> has plans to meet future energy needs	51%	42%
% who mentioned their electric utility top-of-mind unaided – Pacific Power	77%	55%
% who mentioned their electric utility top-of-mind unaided – Rocky Mountain Power	70%	44%

RED = significant difference



Next Steps

- Continue the use of television commercials and bill inserts in order to reach the largest number of customers possible.
 - Those who recall the most advertisements are seeing the ads on TV; those who recall the most ads are most likely to take action based on the ads.
- Continue efforts to present content, such as commercials or key messages/themes, on the website (including online payment pages) in order to increase views and awareness. Presenting advertising messaging online may help reach younger customers.
- Maintain the themes of advertisements; the most important messages have the highest recall among Ad Aware customers.
- One quarter of Pacific Power and one third of Rocky Mountain Power customers report taking action as a result of the ads. In order to increase this percentage, the call to action needs to be consistent across advertisements and media, clear and persuasive.



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, the 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 vs. 2009

- Top of mind awareness for both Pacific Power and Rocky Mountain Power remain high.
 - Pacific Power top of mind awareness has remained the same for Ad Aware customers and has decreased for Ad Non-Aware audiences.
 - Rocky Mountain Power awareness has increased among Ad Aware customers and has also decreased for Ad Non-Aware audiences.

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%

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

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

Top of Mind Unaided Company Awareness 2010

- 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.
- Among those Ad Non-Aware, more than half of Pacific Power customers and more than two fifths of Rocky Mountain Power customers mention their utility as top of mind.

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%	6%
Rocky Mountain Power/Utah Power	<1%	70%	--	44%
Pacific Gas & Electric/PG&E	6%	<1%	8%	3%
NW Natural	5%	--	7%	--
Portland General/PGE	3%	--	4%	--
PacifiCorp	1%	2%	1%	1%
Avista	1%	--	2%	--
Mountain Fuel/Questar	--	18%	<1%	19%
Other	6%	8%	6%	11%
None	--	--	15%	16%

*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?

77% = significantly higher than Ad Non-Aware customers
15% = significantly higher than Ad Aware customers

Total Unaided Company Awareness 2010 vs. 2009

- 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.
- Overall awareness of Pacific Power and Rocky Mountain Power decreased in 2010.
 - Awareness of Rocky Mountain Power dropped significantly for Ad Non-Aware customers (62% vs. 74%).
 - Awareness of all utility companies decreased among Ad Aware customers.

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

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

↑ = significantly higher than 2009

↓ = significantly lower than 2009

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?



Total Unaided Company Awareness 2010

- Ad Aware customers have significantly higher awareness than those Ad Non-Aware:
 - Pacific Power Ad Aware customers are significantly more likely to be aware of Pacific Power 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.

2010 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=435)</i>	Rocky Mt. Power <i>(n=440)</i>	Pacific Power <i>(n=387)</i>	Rocky Mt. Power <i>(n=268)</i>
Pacific Power/PPL	87%	3%	66%	6%
Rocky Mountain Power/Utah Power	<1%	87%	<1%	62%
Pacific Gas & Electric/PG&E	12%	2%	11%	3%
NW Natural	17%	<1%	17%	0%
Portland General/PGE	6%	<1%	6%	<1%
PacifiCorp	1%	3%	1%	1%
Avista	4%	0%	5%	0%
Mountain Fuel/Questar	<1%	56%	<1%	40%
Other	21%	19%	16%	16%

*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 2010 vs. 2009

- Awareness of all utility advertisements and communications has decreased significantly in 2010, with both Pacific Power and Rocky Mountain Power customers experiencing lower recall of their utility company's advertisements.

2010 Unaided Ad Awareness	Pacific Power (n=760)	Rocky Mt. Power (n=665)
Pacific Power/PPL	33% ↓	1%
Rocky Mountain Power/Utah Power	0%	42% ↓
None	55% ↑	43% ↑

2009 Unaided Ad Awareness	Pacific Power (n=403)	Rocky Mt. Power (n=456)
Pacific Power/PPL	45%	1%
Rocky Mountain Power/Utah Power	0%	50%
None	45%	34%

↑ = significantly higher than 2009
↓ = significantly lower than 2009

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 2010

- Unaided, one third of Pacific Power and two fifths of Rocky Mountain Power customers recall an advertisement or communication from their electric company during the past six months.
- Roughly one third of Rocky Mountain Power customers have unaided recall of Mountain Fuel/Questar advertisements, and approximately 10% of Pacific Power customers mention NW Natural.

2010 Unaided Ad Awareness	Pacific Power (n=760)	Rocky Mt. Power (n=665)
Pacific Power/PPL	33%	1%
NW Natural ←	9%	0%
Pacific Gas & Electric/PG&E	4%	1%
Portland General/PGE	2%	0%
PacifiCorp	1%	1%
Avista	1%	0%
Mountain Fuel/Questar ←	0%	31%
Rocky Mountain Power/Utah Power	0%	42%
Other	6%	5%
None	55%	43%

*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?*

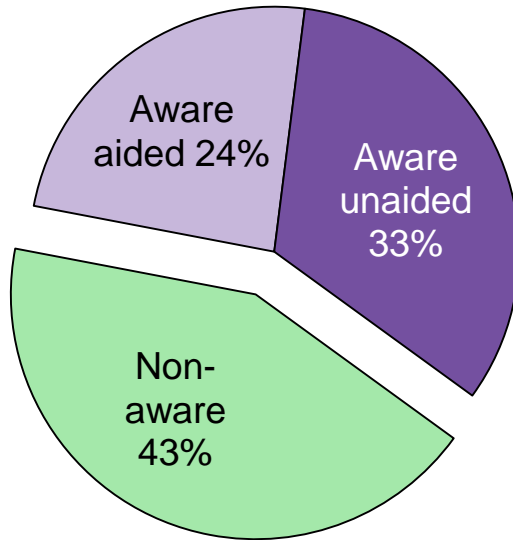
Total Advertisement Awareness

Pacific Power

- Total advertising recall combines unaided recall (previous pages) and aided recall of advertisements or communications during the past 6 months.
- In total, nearly three fifths (57%) of Pacific Power customers are aware of the company's advertisements or communications, showing a significant decrease from 2009 awareness of 63%.
 - Unaided awareness of Pacific Power advertisements dropped significantly since 2009 (33% vs. 45%).
- Younger customers (18-34) are most likely to recall the Pacific Power advertisements.

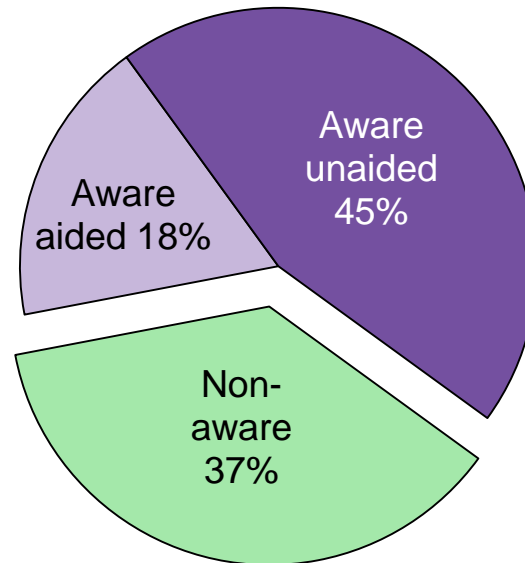
2010 Pacific Power

(n=760)



2009 Pacific Power

(n=403)



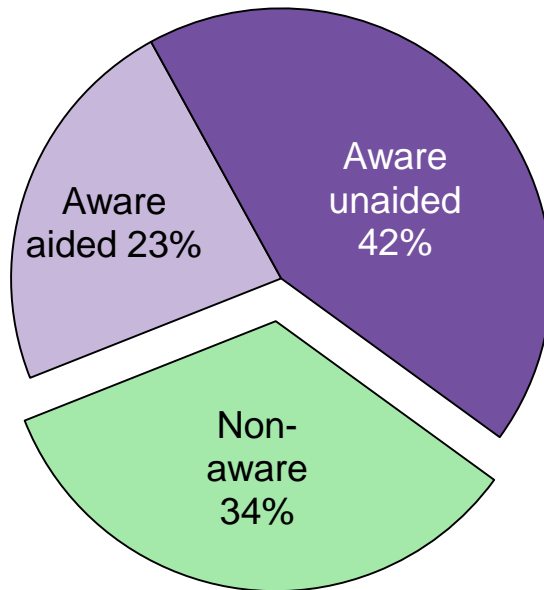
Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

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

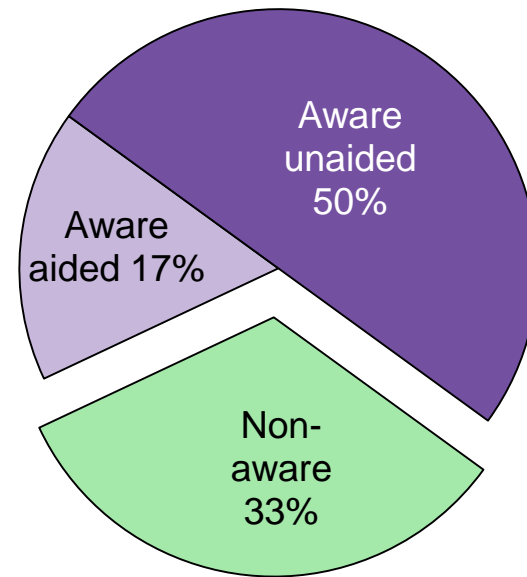
Total Advertisement Awareness Rocky Mountain Power

- In total, two thirds of Rocky Mountain Power customers are aware of the company's advertisements or communications, consistent with 2009.
 - However, unaided awareness of Rocky Mountain Power advertisements decreased significantly since 2009 (42% vs. 50%).
- Younger customers (18-34) and those with an income over \$30K are most likely to recall the Rocky Mountain Power advertisements.

2010 Rocky Mountain Power
(n=665)



2009 Rocky Mountain Power
(n=456)



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?

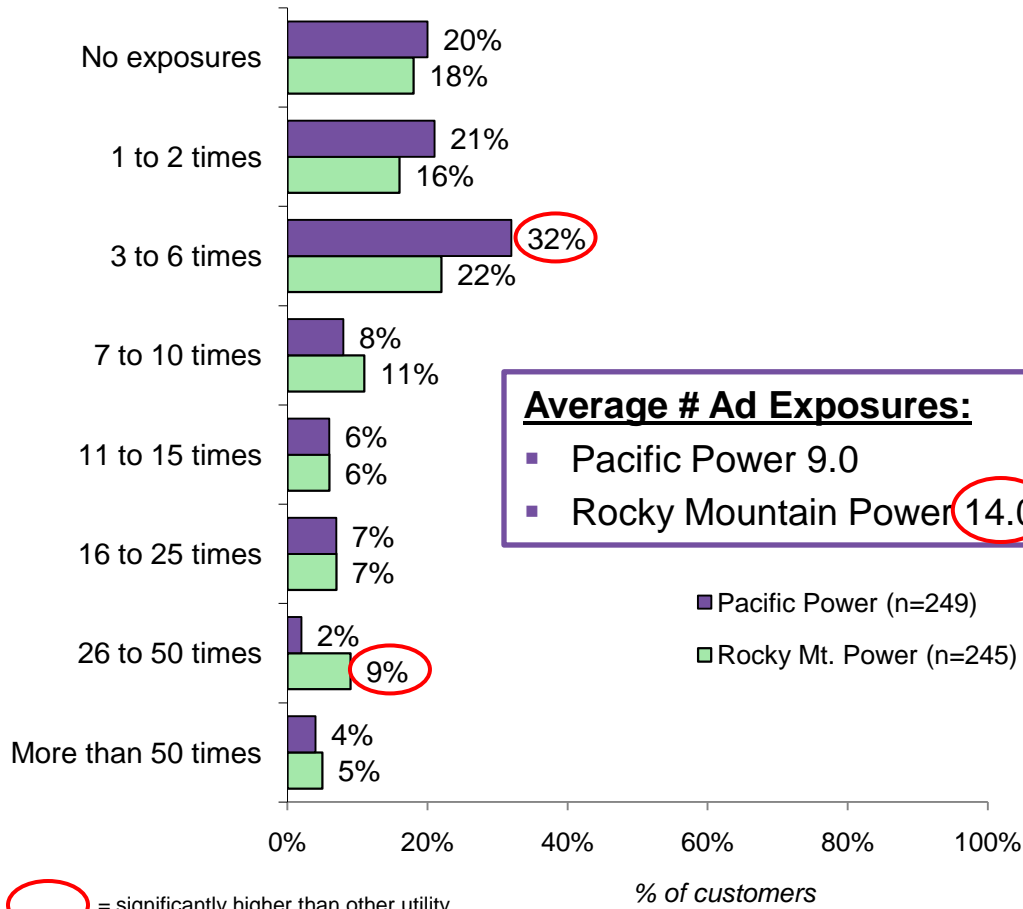


Advertising & Communication Recall

- 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 series of questions presented in this section.

Advertising Exposure Recall

2010 Number of Recalled Advertising Exposures



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

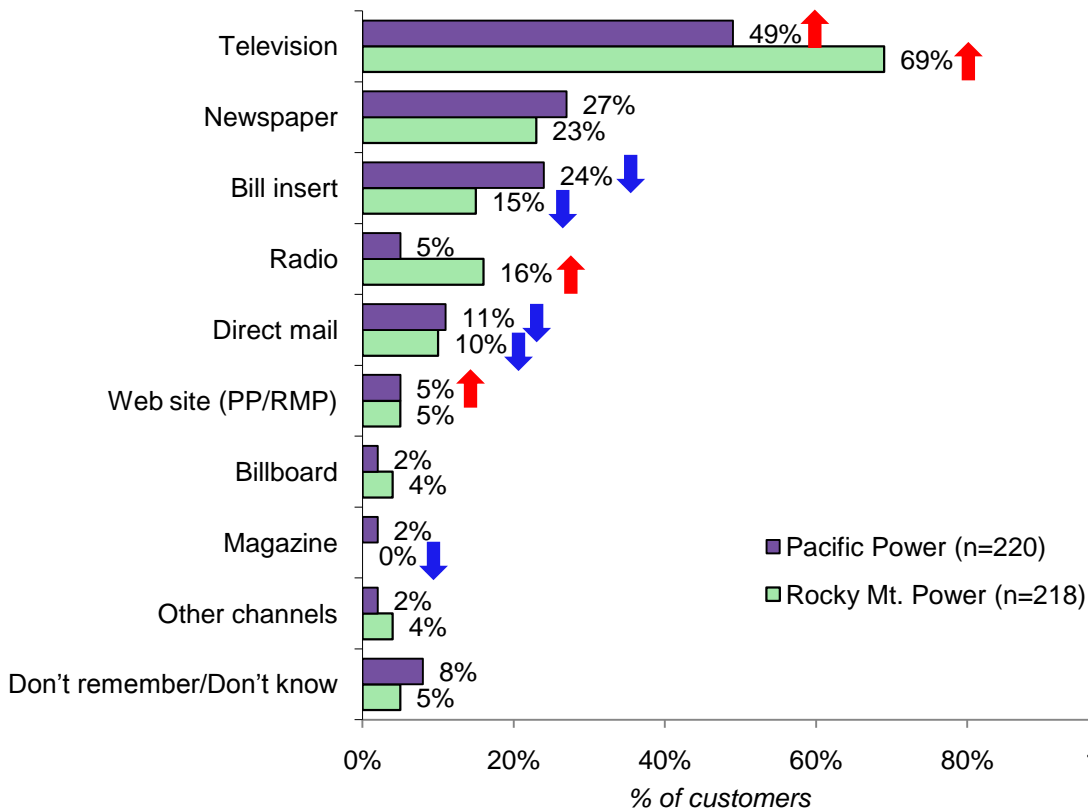
- Those with a high number of ad exposures (21 or more) are more likely to:
 - Have seen the ads on television.
 - Recall messages “working to keep your power on” and “transmission line projects.”
 - Recall “Let’s Turn the Answers On.”
- No statistical differences exist in company or advertisement perceptions between those with a low, moderate or high number of exposures.

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

Advertising & Communication Channels 2010 vs. 2009

- Television has increased significantly since 2009, as a source of hearing or seeing advertisements for both Pacific Power and Rocky Mountain Power.
- Mentions of *bill inserts* and *direct mail* have decreased significantly across both utilities.

2010 Advertising & Communication Channels



	2009 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)
Television	34%	44%
Newspaper	21%	18%
Bill insert	42%	34%
Radio	6%	8%
Direct mail	19%	18%
Web site (PP/RMP)	<1%	6%
Billboard	2%	4%
Magazine	2%	2%
Other channels	4%	5%
Don't remember/Don't know	4%	2%

↑ = significantly higher than 2009

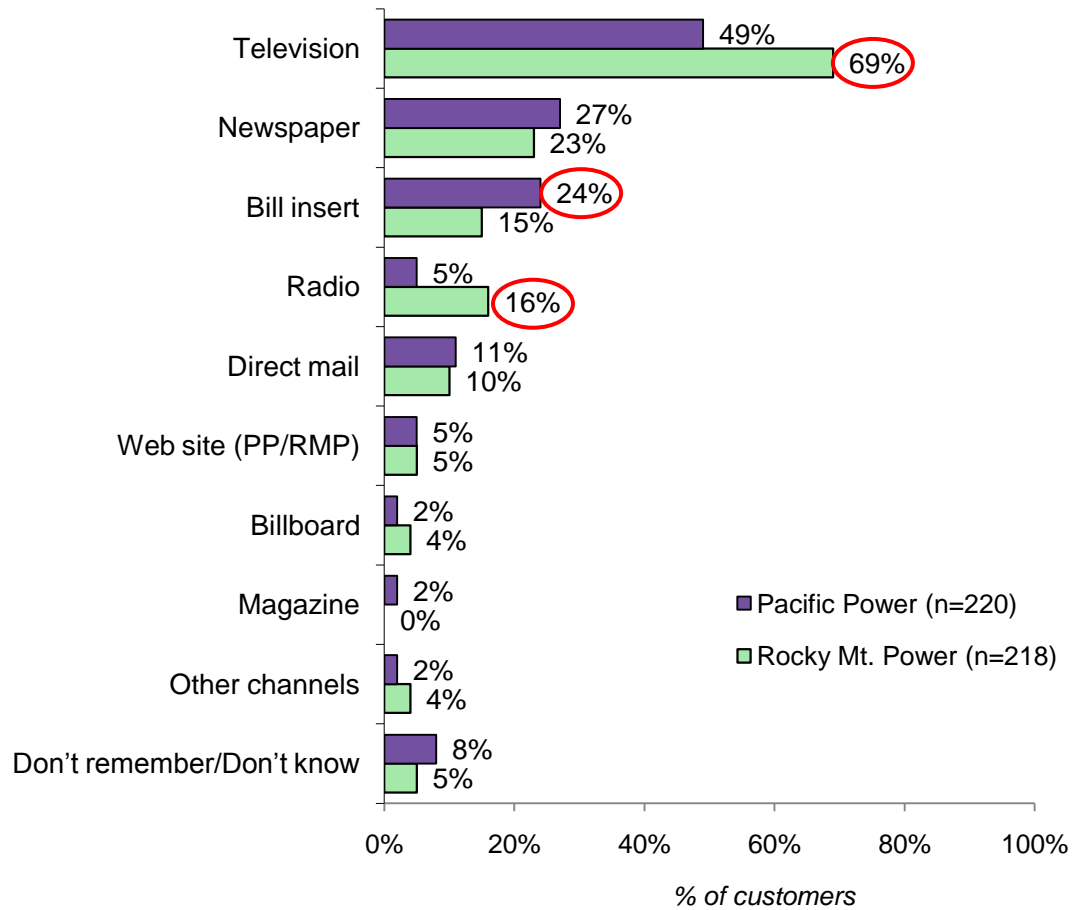
↓ = significantly lower than 2009

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

Advertising & Communication Channels 2010

- *Television* is the most frequently mentioned channel for advertisements and communications.
- Rocky Mountain Power customers are more likely than Pacific Power customers to remember ads through *television* and *radio*, while bill inserts are mentioned significantly more frequently among Pacific Power customers.
- Recall of the “Let’s Turn the Answers On” slogan is significantly higher for those who recall seeing the *television* ads.
- Those with a less favorable opinion of the utility company due to the advertisements are more likely to recall the advertisements arriving in the form of *direct mail* pieces.

2010 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?

Unaided & Aided Message Recall 2010 vs. 2009

- Aided awareness of “energy efficiency programs,” “renewable or alternative energy” and “planning for your future energy needs” decreased significantly for Pacific Power customers.

Messages Recalled	Pacific Power				Rocky Mt. Power			
	Unaided		Aided		Unaided		Aided	
	2010 (n=220)	2009 (n=200)	2010 (n=220)	2009 (n=200)	2010 (n=218)	2009 (n=200)	2010 (n=218)	2009 (n=200)
Energy efficiency programs	17%	19%	50%↓	60%	26%	31%	51%	52%
Using energy wisely	14%	14%	49%	56%	21%	18%	57%	50%
Renewable or alternative energy	20%	28%	41%↓	54%	7%↓	16%	44%	39%
Electrical safety	12%	10%	38%	42%	9%	8%	39%	36%
Working to keep your power on	1%	3%	29%	27%	4%	4%	36%	37%
Billing or energy assistance	7%	n/a	35%	n/a	2%	n/a	28%	n/a
Planning for your future energy needs	5%↑	1%	26%↓	34%	3%	5%	32%	36%
Programs such as equal pay/customer guarantees	4%↓	10%	25%	31%	7%	9%	29%	34%
Preparing for power outages	1%	1%	34%	42%	2%	2%	26%	31%
Transmission line projects	4%	1%	10%	12%	2%	2%	11%↓	20%
Environment friendly	2%	5%	n/a	n/a	2%	<1%	n/a	n/a
Other messages	13%↑	5%	n/a	n/a	12%↑	3%	1%	n/a
Don't remember/Don't know	36%	30%	10%↑	4%	33%	32%	7%	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 2009

↓ = significantly lower than 2009


Unaided & Aided Message Recall 2010

- Overall, “using energy wisely” and “energy efficiency programs” are the most widely recalled messages.
- Rocky Mountain Power customers are significantly more likely to recall messages about “energy efficiency programs” (unaided) and “working to keep the power on” (unaided) than Pacific Power customers.
- Pacific Power customers are significantly more likely to recall messages with content about “renewable or alternative energy” (unaided) and “billing or energy assistance” (unaided).

Messages Recalled	Pacific Power (n=220)		Rocky Mt. Power (n=218)	
	Unaided	Aided	Unaided	Aided
Energy efficiency programs ← <i>Second highest aided recall</i>	17%	50%	26%	51%
Using energy wisely ← <i>Highest aided recall</i>	14%	49%	21%	57%
Renewable or alternative energy	20%	41%	7%	44%
Electrical safety	12%	38%	9%	39%
Working to keep your power on	1%	29%	4%	36%
Billing or energy assistance	7%	35%	2%	28%
Planning for your future energy needs	5%	26%	3%	32%
Programs such as equal pay/customer guarantees	4%	25%	7%	29%
Preparing for power outages	1%	34%	2%	26%
Transmission line projects	4%	10%	2%	11%
Environment friendly	2%	n/a	2%	n/a
Other messages	13%	n/a	12%	1%
Don't remember/Don't know	36%	10%	33%	7%

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

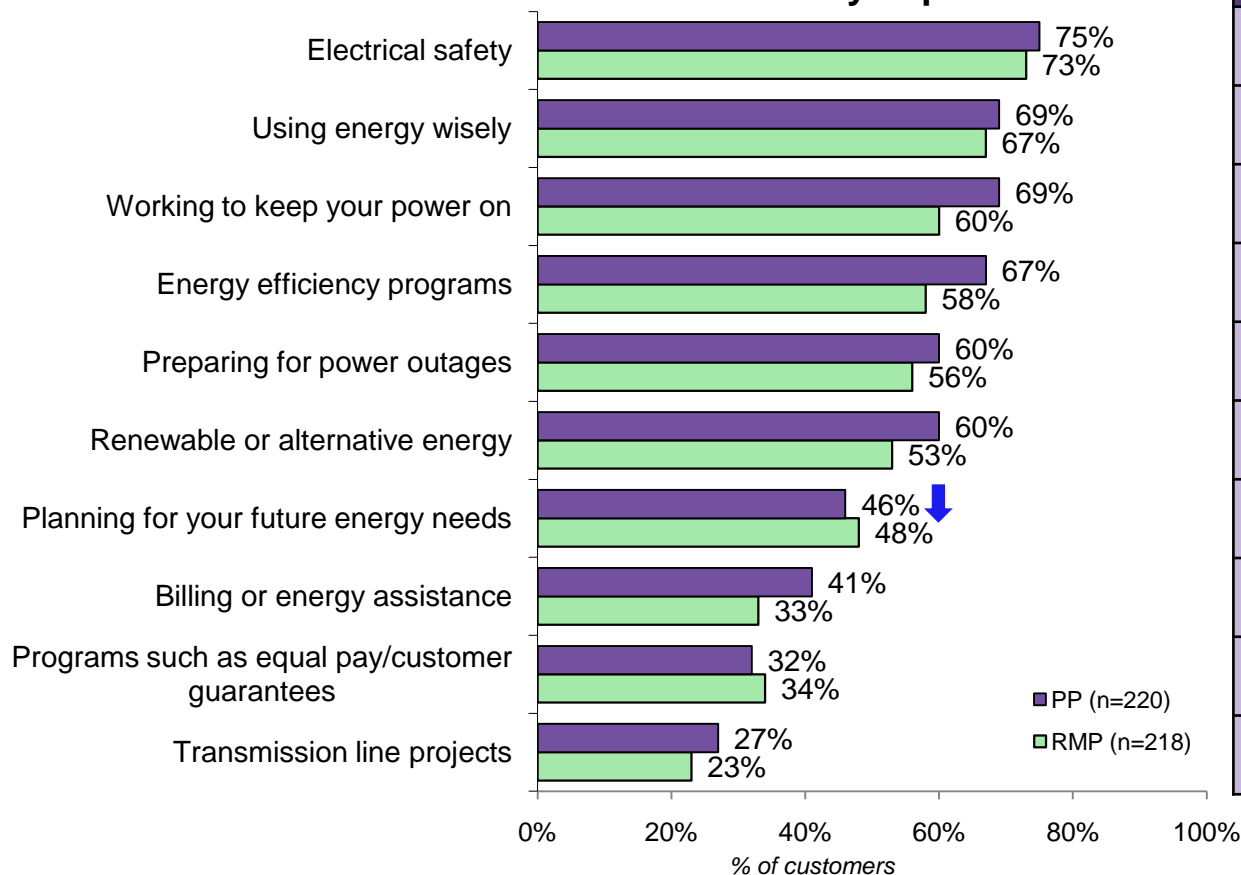
Q7 Do you remember any of the following messages or topics from the UTILITY advertisements or communications?

 = significantly higher than other utility

Importance of Communication Messages 2010 vs. 2009

- “Electrical safety,” “using energy wisely,” “working to keep your power on” and “energy efficiency programs” remain the messages most important to customers.

2010 % Very Important



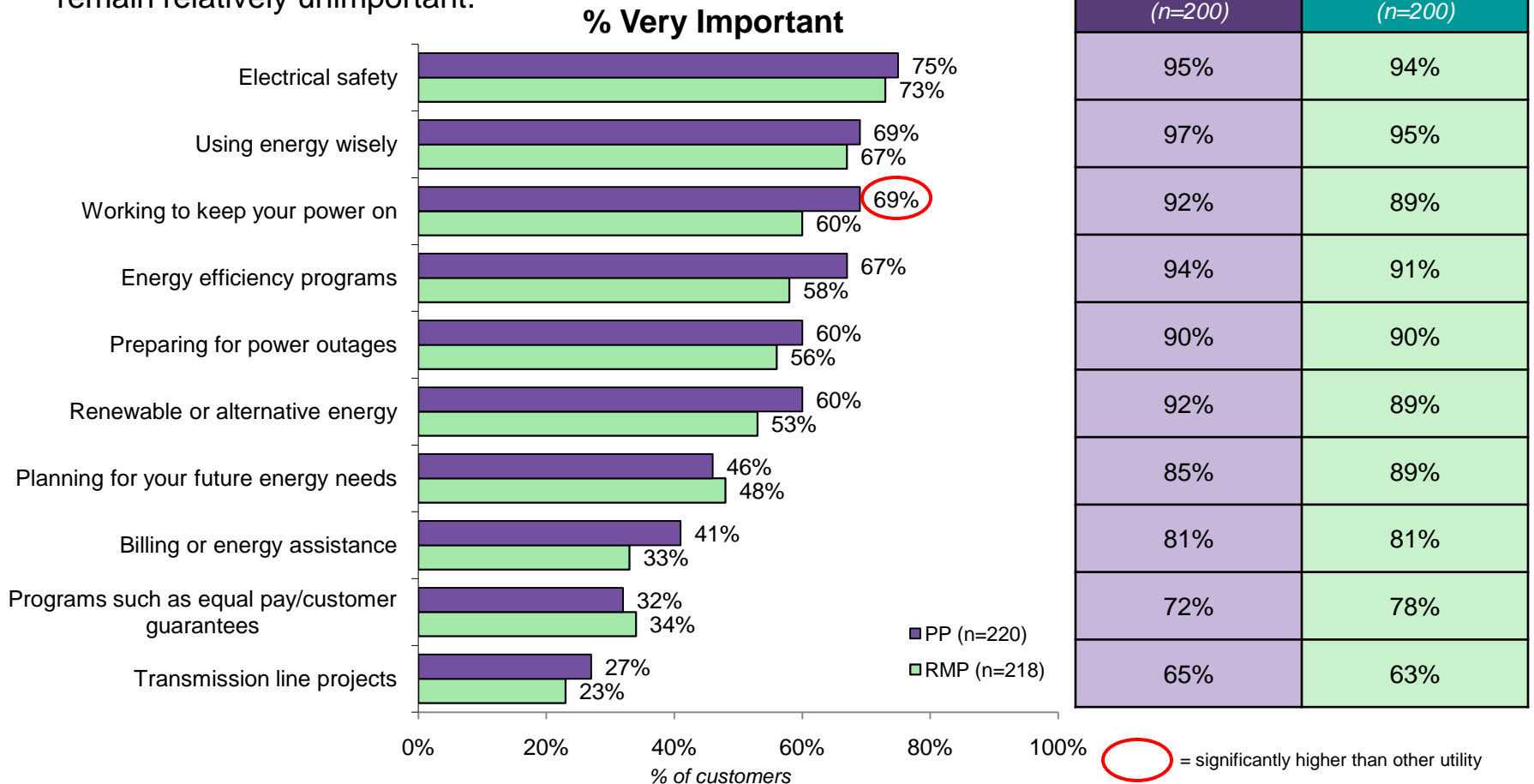
	2009 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)
Electrical safety	76%	76%
Using energy wisely	76%	70%
Working to keep your power on	61%	62%
Energy efficiency programs	72%	64%
Preparing for power outages	55%	52%
Renewable or alternative energy	64%	60%
Planning for your future energy needs	57%	52%
Billing or energy assistance	n/a	n/a
Programs such as equal pay/customer guarantees	34%	32%
Transmission line projects	24%	24%

↓ = significantly lower than 2009

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 2010

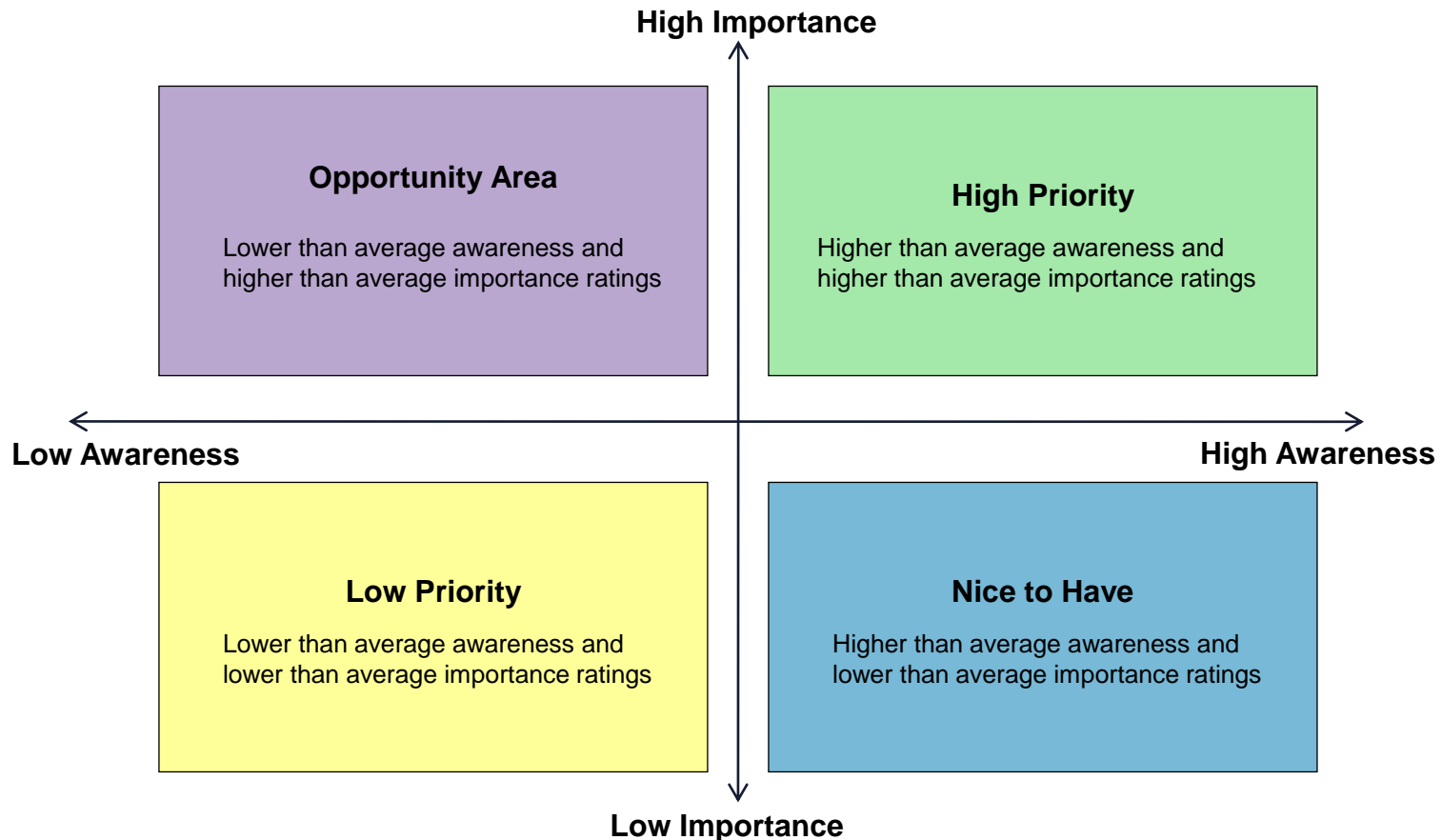
- Messages about company “programs such as equal pay and customer guarantees,” as well as messages about “transmission line projects,” remain relatively unimportant.



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

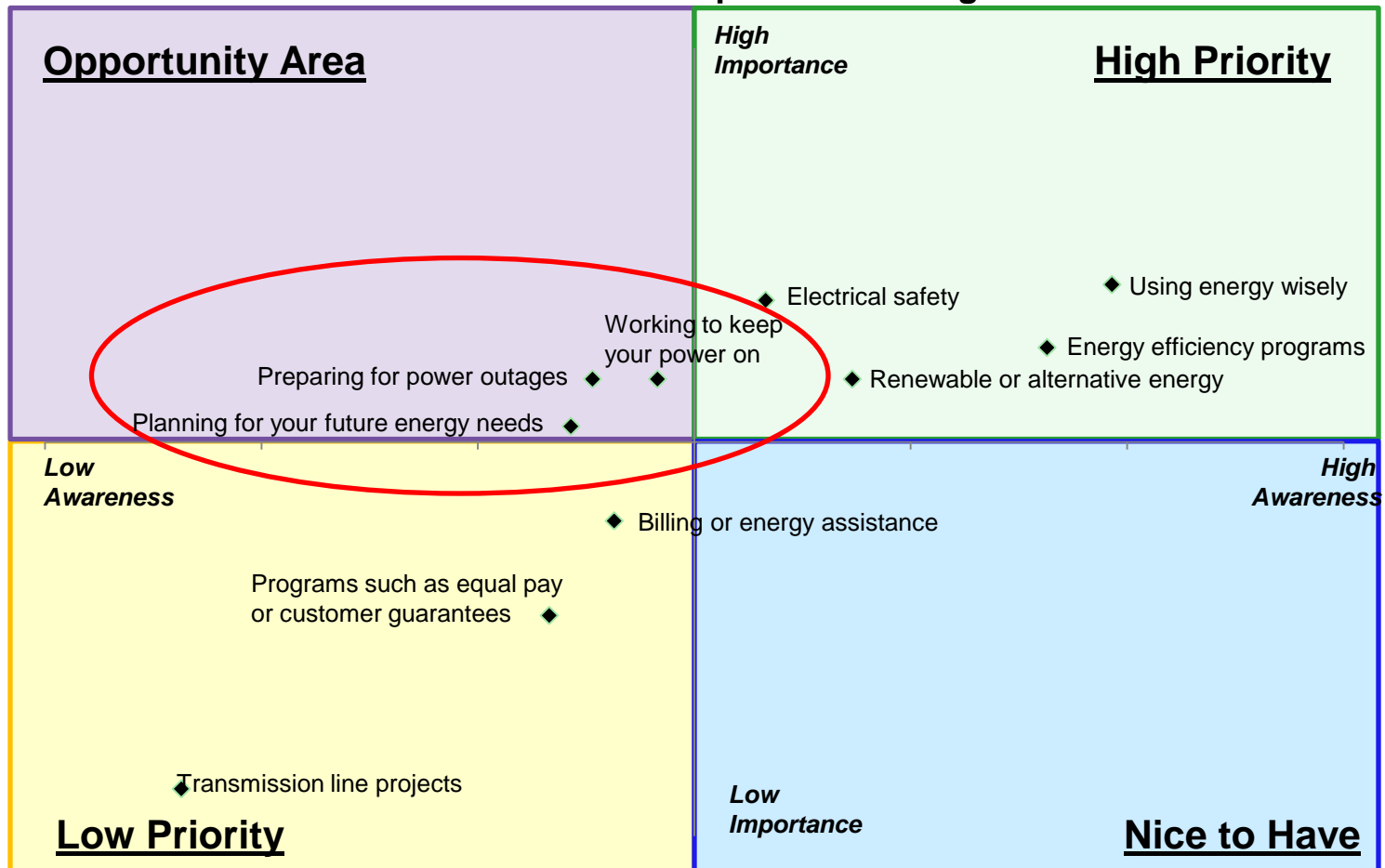
- The following slide presents a quadrant chart outlining the relative importance of each advertising message and the relative awareness of each message.
- Messages considered highly important, but with low awareness, indicate opportunity areas for Pacific Power and Rocky Mountain Power. Increasing awareness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



Message Awareness vs. Importance Ratings 2010

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

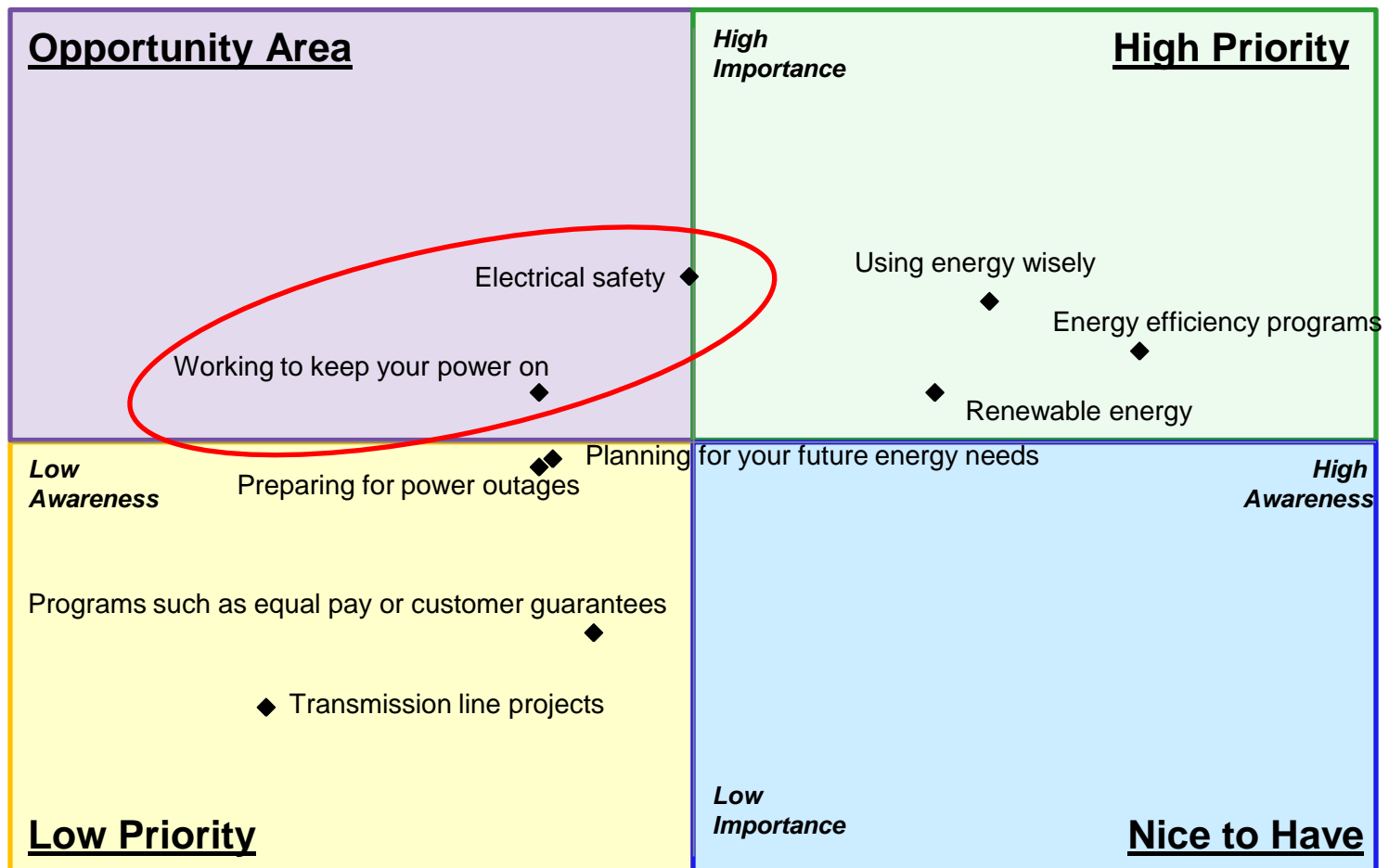
2010 Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2009

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

2009 Awareness vs. Importance Ratings



Additional Suggested Messages 2010 vs. 2009

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

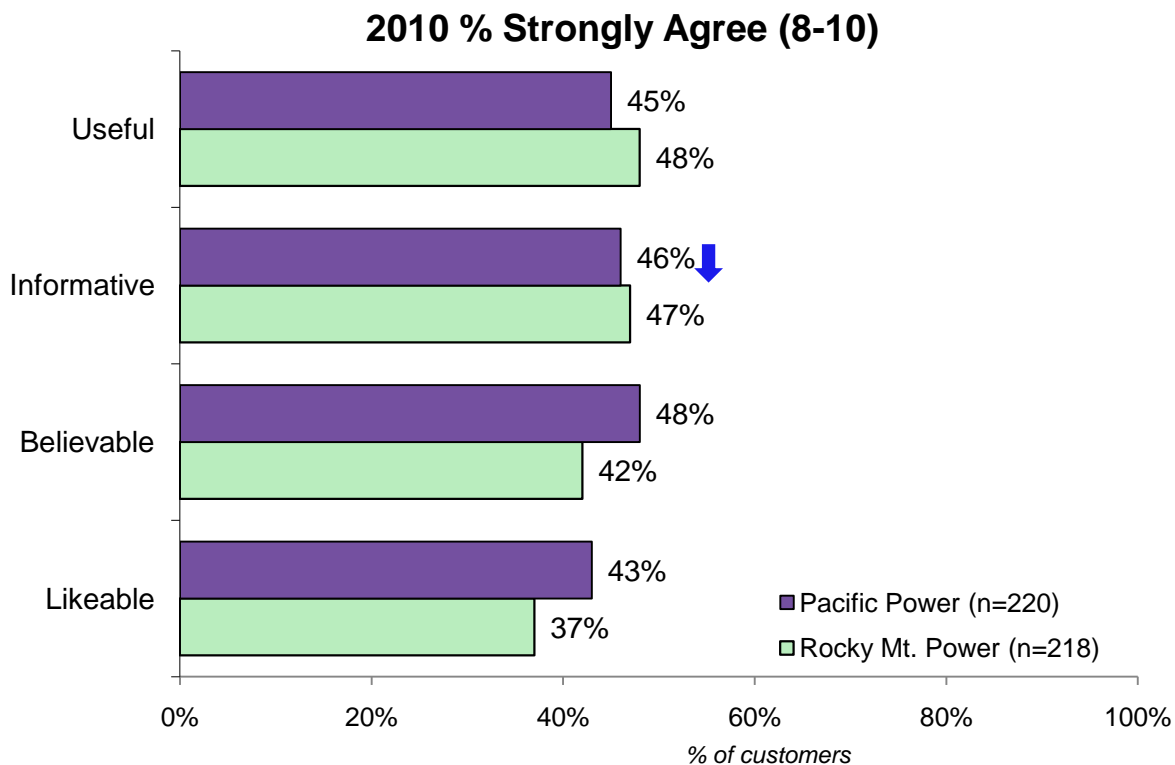
Other Important Topics	Pacific Power		Rocky Mt. Power	
	2010 (n=220)	2009 (n=200)	2010 (n=218)	2009 (n=200)
All information provided is sufficient	15%	22%	18%	24%
Alternative Energy/Energy Efficiency	19% ↓	34%	18% ↓	40%
Breakdown of how to practice energy efficiency/info on energy efficient appliances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

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

↑ = significantly higher than 2009
↓ = significantly lower than 2009

Perception of Advertisements & Communications 2010 vs. 2009

- Pacific Power customers find the advertisements to be significantly less *informative* and less *believable* in 2010; however, ad *likeability* has increased.
- Rocky Mountain Power customers find the advertisements to be slightly more *informative* and *likeable*; however, the *believability* of the ads has decreased among this audience.



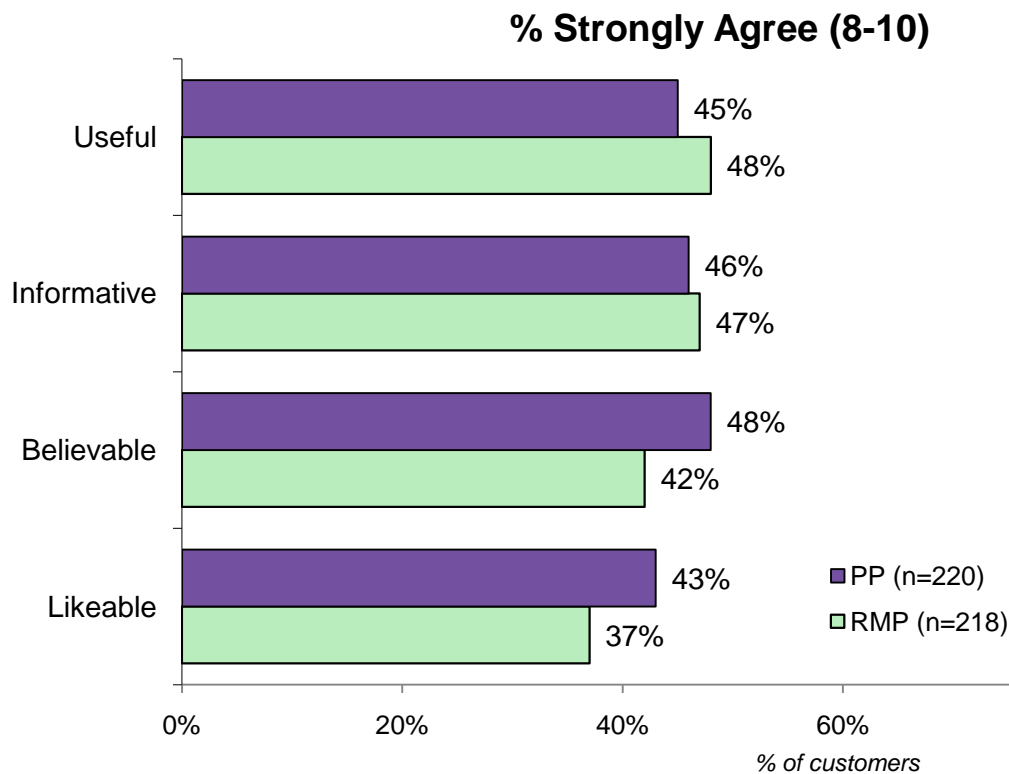
	2009 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)
	n/a	n/a
	58%	45%
	54%	50%
	38%	34%

↓ = significantly lower than 2009

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 2010

- Overall, advertisements and communications are perceived to be *useful* and *informative*.
 - Rocky Mountain Power customers are more likely than Pacific Power customers to find the advertisements *not informative*.



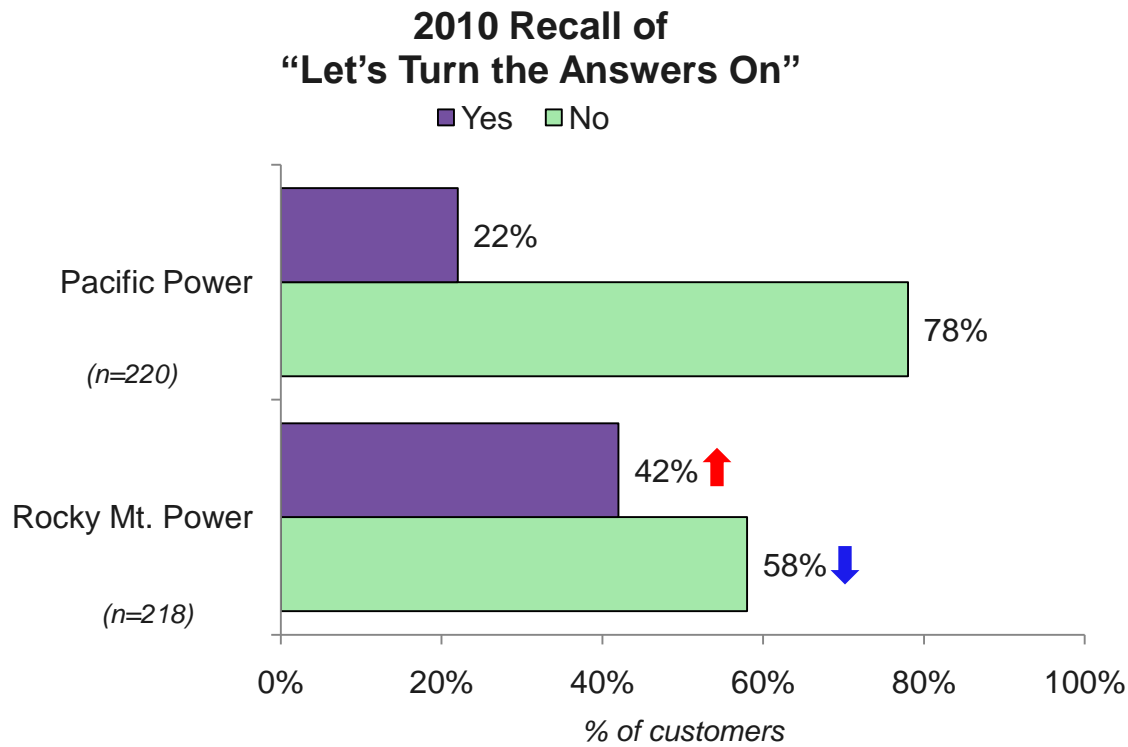
% Strongly Disagree (0-4)	
Pacific Power (n=220)	Rocky Mt. Power (n=218)
9%	13%
7%	13%
10%	11%
15%	15%

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” 2010 vs. 2009

- Recall of “Let’s Turn the Answers On” is significantly higher in 2010 for Rocky Mountain Power customers, and 6% points higher for Pacific Power customers.



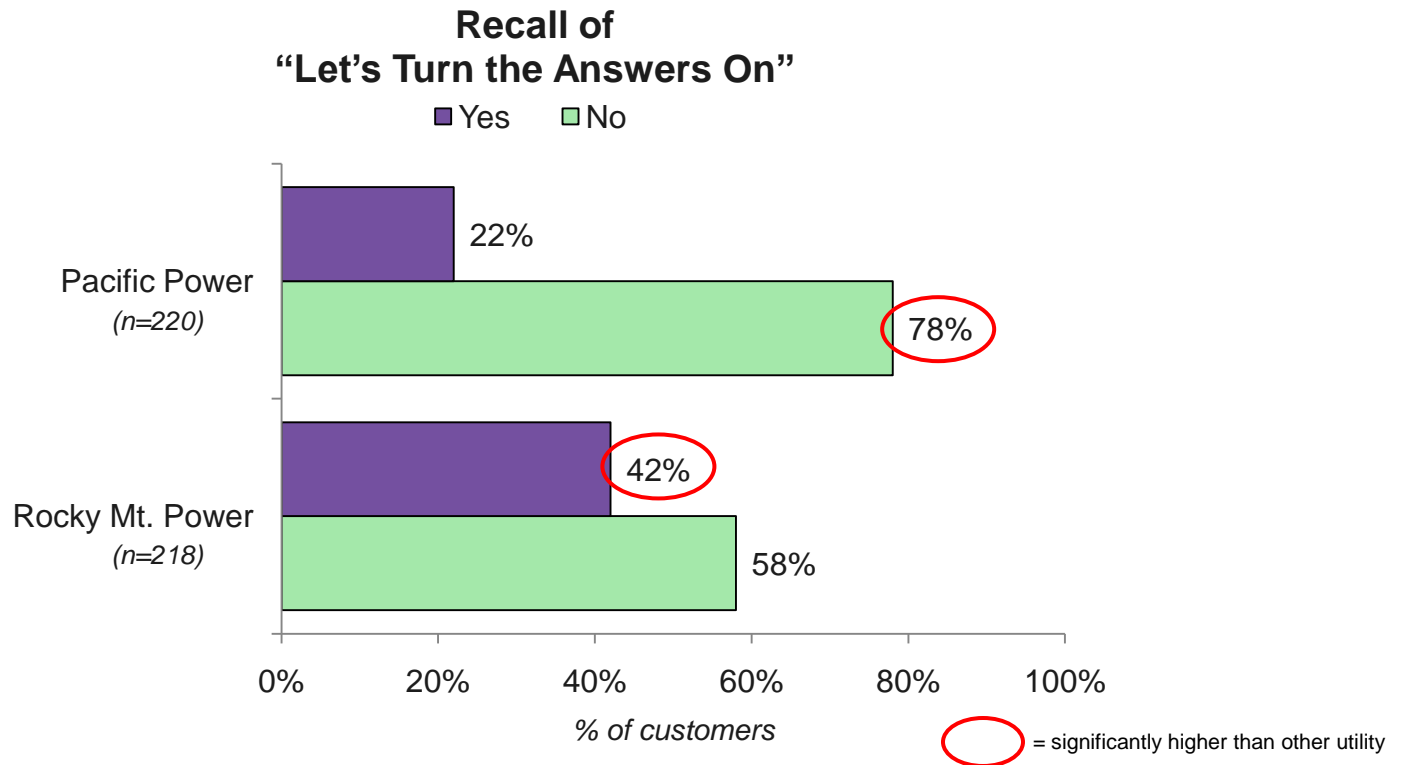
2009 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)
16% yes	28% yes
84% no	72% no

↑ = significantly higher than 2009
↓ = significantly lower than 2009

Q11. Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

“Let’s Turn the Answers On” 2010

- Among all Ad Aware customers, one third (33%) remember the phrase “Let’s Turn the Answers On.”
- The following audiences are more likely to recall the phrase “Let’s Turn the Answers On”:
 - Rocky Mountain Power customers (42% vs. 22% Pacific Power);
 - Younger customers, ages 18-34 (44% vs. 30%); and
 - Customers who took action after seeing the ads (50% vs. 27%).

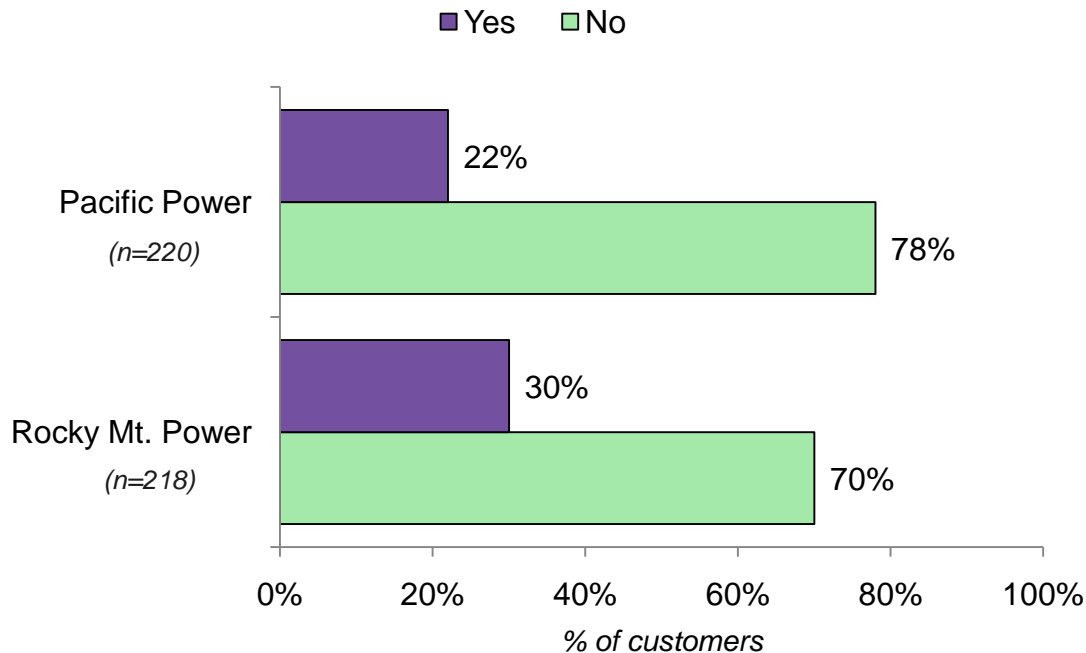


Q11. Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

Persuasiveness of Advertisement in Call to Action 2010 vs. 2009

- The percentage of customers who were persuaded to take action based on the advertisements and the actions taken remained consistent in 2010.

2010 Took Action Based on Advertisement



2009 Pacific Power (n=200)	2009 Rocky Mt. Power (n=200)
24% yes	--
76% no	--
--	30% yes
--	70% no

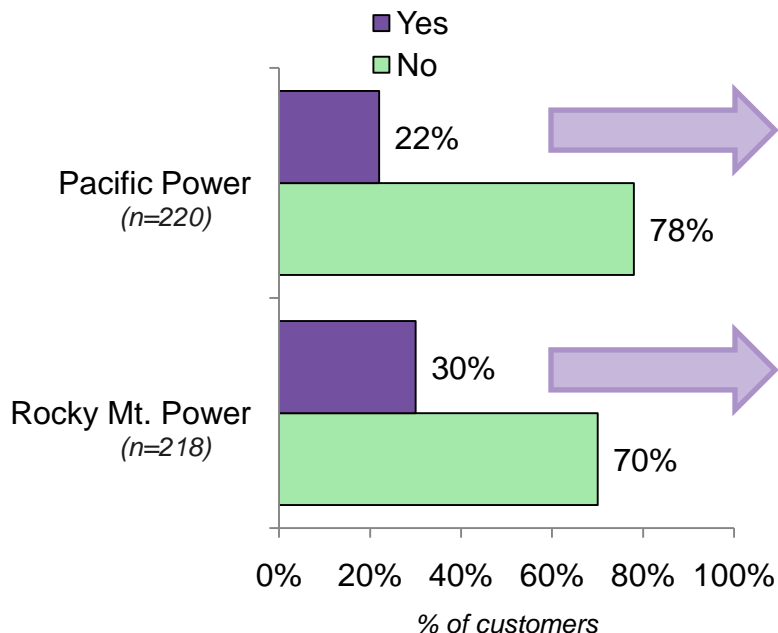
Q12. Did any of the UTILITY ads or communications persuade you to take any action?

Q13. What action did you take from seeing the UTILITY ads or communications?

Persuasiveness of Advertisement in Call to Action 2010

- Overall, one quarter (26%) of Ad Aware customers report taking some action based on the advertisements or communications.
- Of customers persuaded to take action based on the ads, “switching to energy efficient appliances/lights” and “shutting off lights/appliances when not in use” are the top items for Rocky Mountain customers and “switching to energy efficient appliances/lights” and “more aware of power usage” are the most frequently mentioned by Pacific Power customers.

Took Action Based on Advertisement



Actions taken from seeing the ads or communications	Pacific Power (n=48)	Rocky Mt. Power (n=65)
Purchased/switched to energy efficient appliances/lights	25%	29%
Shutting off lights/appliances when not in use	19%	29%
More aware of power usage (general)	25%	25%
Enlisting in utility incentive/rebate programs	10%	22%
More cautious about energy safety	15%	9%
Changing daily usage of appliances	17%	8%
Installing insulation	6%	6%
Invested in the wind power/Blue Sky program	12%	6%
Enlisted in utility financial aid services	0%	2%
Other	2%	2%

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

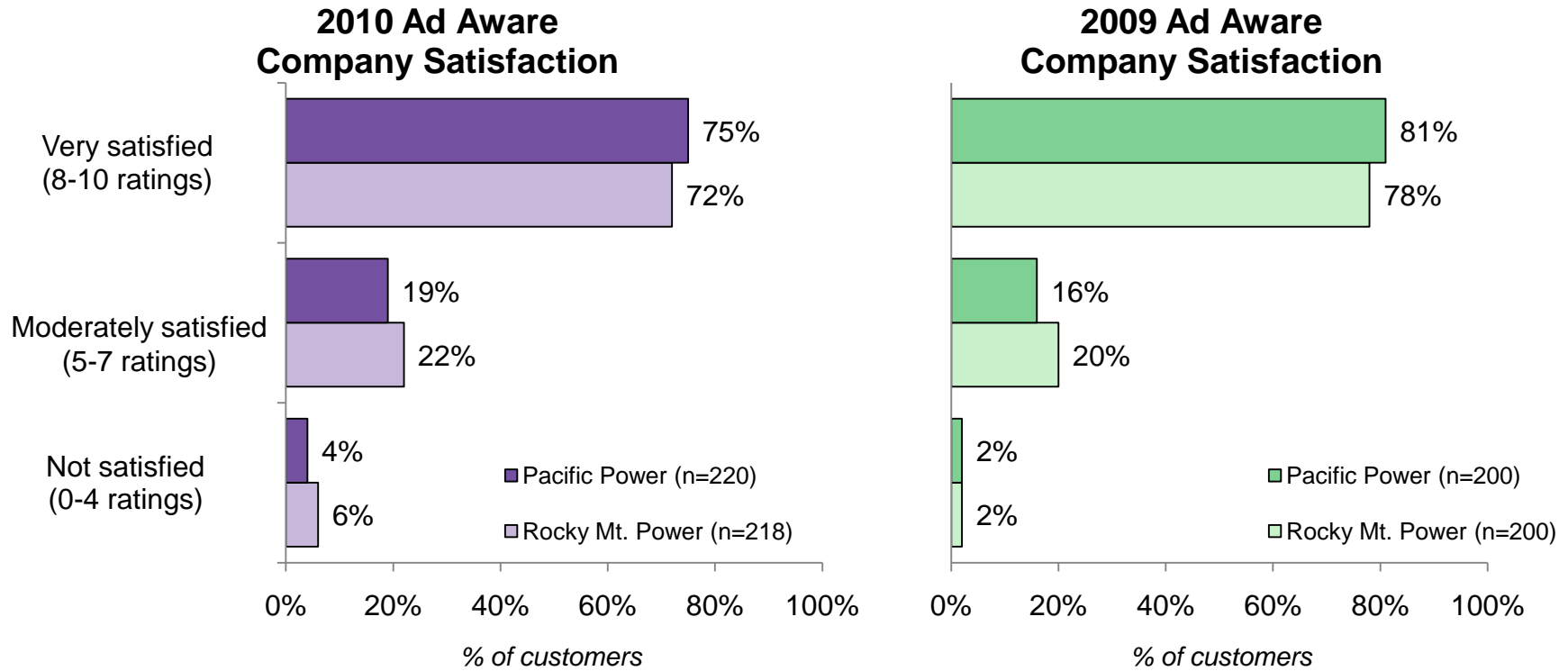
Q13. What action did you take from seeing the UTILITY ads or communications?



Impact of Advertisements and Communications on Customer Satisfaction & Company Image

Advertisements' Impact on Company Satisfaction – Ad Aware

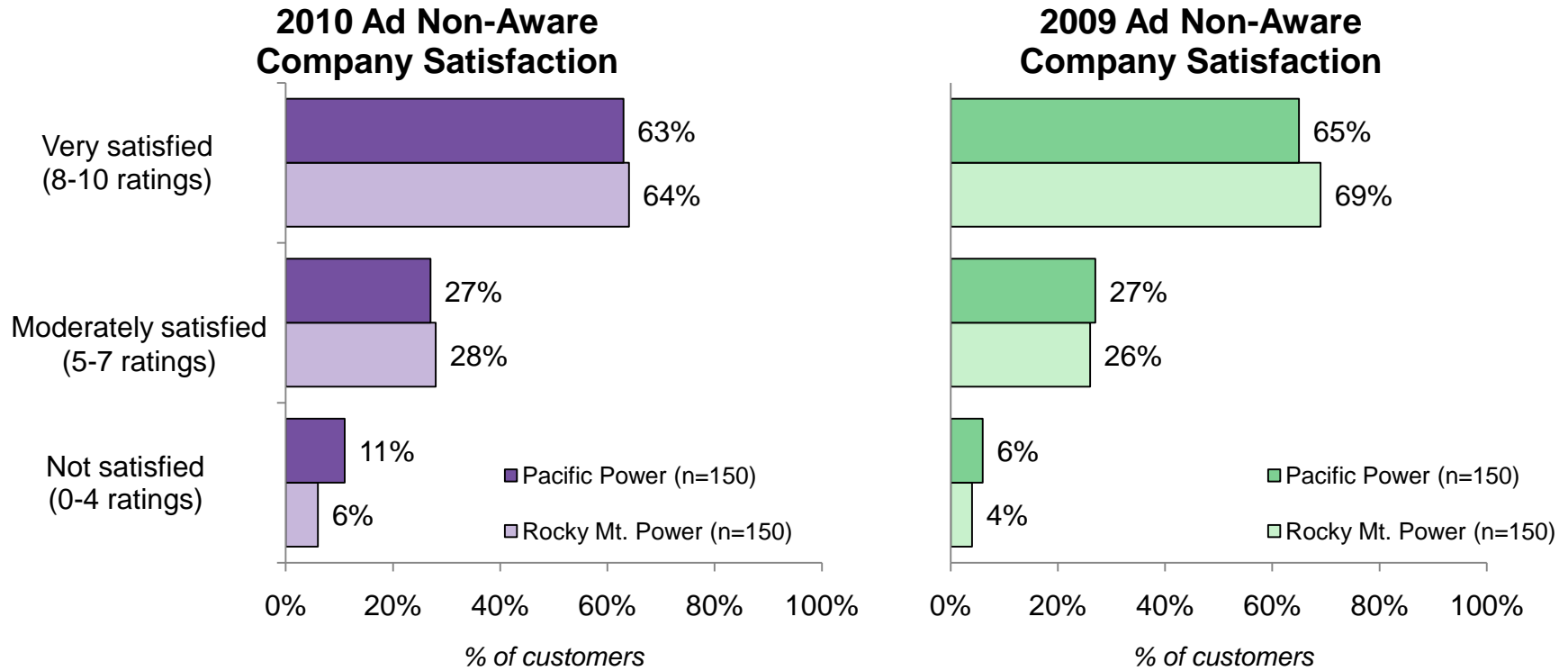
- Three fourths of Pacific Power and Rocky Mountain Power Ad Aware customers are “very satisfied” with their utility company.



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

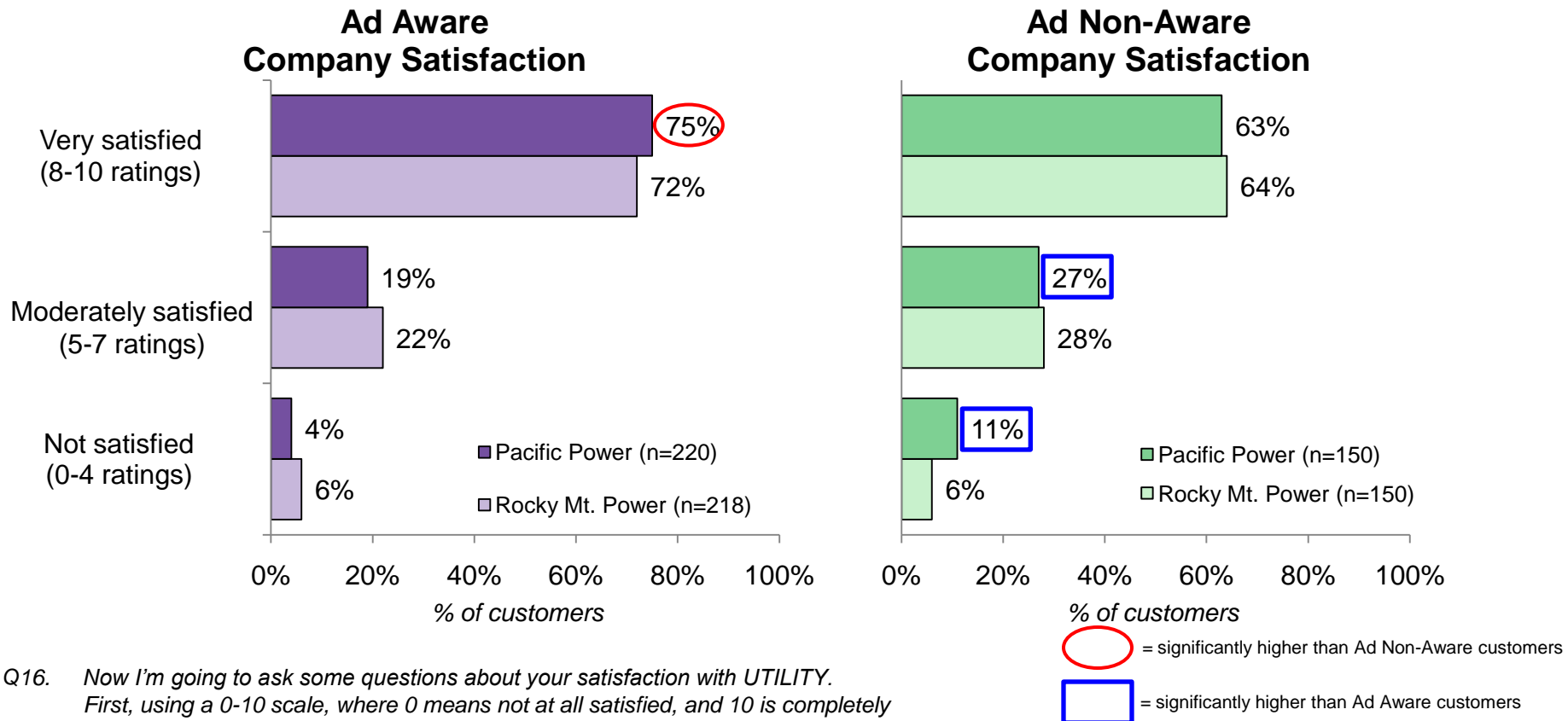
- Satisfaction ratings for Pacific Power and Rocky Mountain Power Ad Non-Aware customers remained consistent in 2010, with two thirds “very satisfied” with their utility company.



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 – 2010

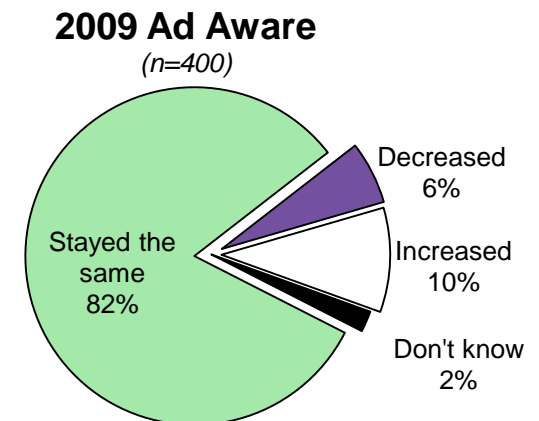
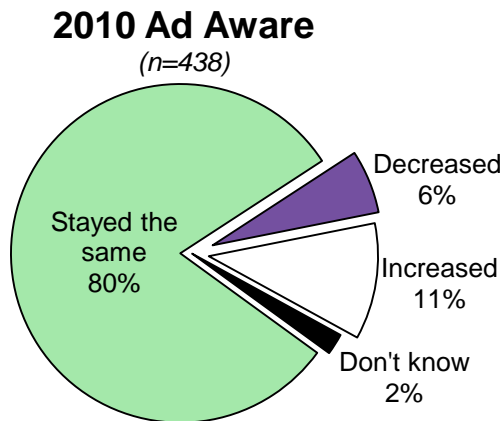
- Pacific Power Ad Aware customers are significantly more satisfied with their electric utility company than Ad Non-Aware customers.
- Pacific Power and Rocky Mountain Power residential customers are equally satisfied with their utility.



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?

Satisfaction Comparison With Last Year Ad Aware

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



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

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

*CAUTION: small sample sizes.

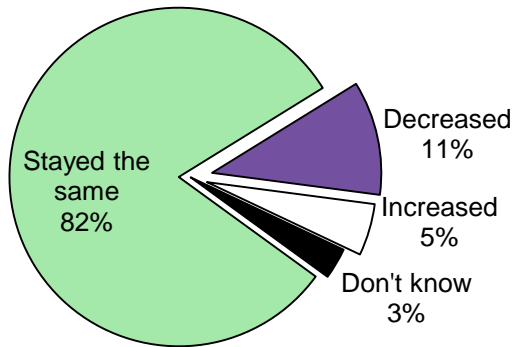
↑ = significantly higher than 2009
↓ = significantly lower than 2009

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

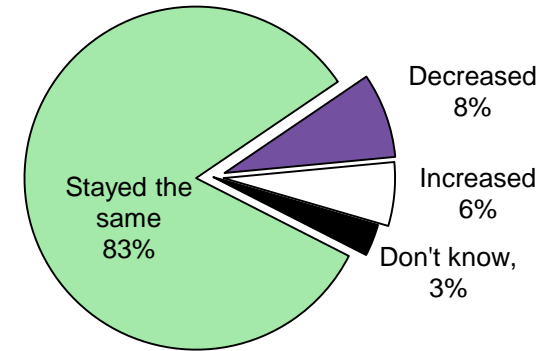
Satisfaction Comparison With Last Year Ad Non-Aware

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

2010 Ad Non-Aware
(n=300)



2009 Ad Non-Aware
(n=300)



Why has your satisfaction increased?	2010 Ad Non-Aware (n=14)*	2009 Ad Non-Aware (n=19)*
Good reliable electrical service	21%	52%
Quality of customer service	21%	19%
Billing services/assistance	21%	12%
Decreased rates/usage	15%	9%
Efforts toward energy conservation	8%	0%
Increased familiarity	0%	15%
Other	16%	0%

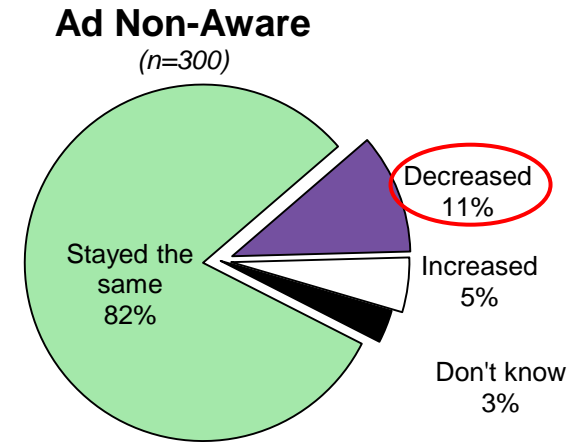
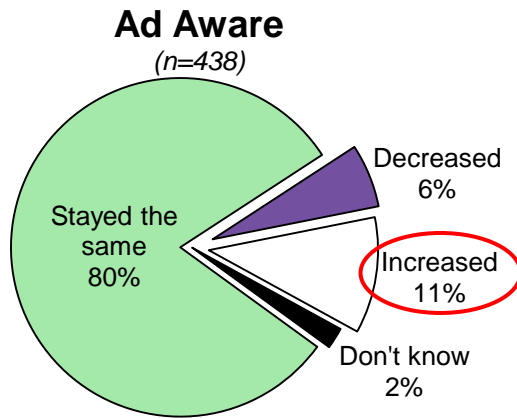
Why has your satisfaction decreased?	2010 Ad Non-Aware (n=32)	2009 Ad Non-Aware (n=25)*
Increased cost/rates	54%	91%
Poor service	26%	21%
Quality of customer service	12%	8%
Many service interruptions	11%	9%
Efforts toward energy conservation	8%	3%
Billing services/assistance	4%	8%
Other	28%	3%

*CAUTION: small sample sizes.

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


Satisfaction Comparison With Last Year 2010

- 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=50)	Ad Non-Aware (n=14)*
Good reliable electrical service	50%	21%
Efforts toward energy conservation	21%	8%
Billing services/assistance	17%	21%
Increased familiarity	12%	0%
Quality of customer service	9%	21%
Decreased rates/usage	6%	15%
Other	4%	16%

Why has your satisfaction decreased?	Ad Aware (n=28)*	Ad Non-Aware (n=32)
Increased cost/rates	48%	54%
Poor service	27%	26%
Many service interruptions	22%	11%
Efforts toward energy conservation	11%	8%
Billing services/assistance	7%	4%
Quality of customer service	4%	12%
Other	7%	28%

 = significantly higher than Ad Non-Aware customers

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

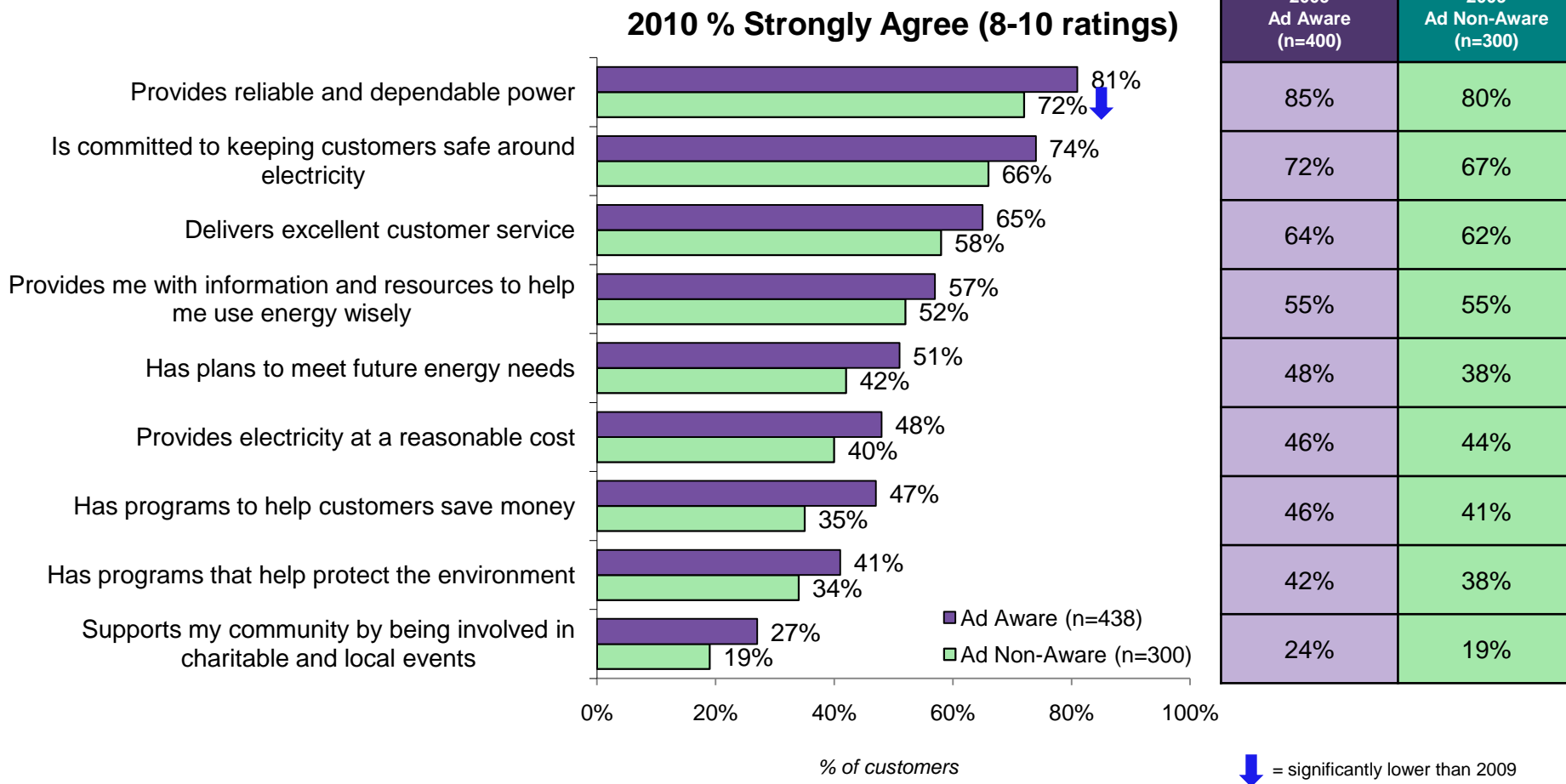


Company Image Evaluation

- Overall, customers' perceptions of their utility company have remained consistent.
- Customers continue to have the most positive perceptions of their utility when it comes to attributes they are most likely to have **personally experienced**, including:
 - Provides reliable and dependable power
 - Is committed to keeping customers safe around electricity
 - Delivers excellent customer service
- Similarly, customers are least likely to agree with, and most likely to give “don't know” responses to the statements to which they are **unlikely to have direct experience**. These statements include:
 - Supports my community by being involved in charitable and local events
 - Has programs that help protect the environment
 - Planning for future energy needs
 - Has programs to help customers save money
- **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 have a more favorable opinion of the utility company, based on the advertisements and communications, 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 2010 vs. 2009

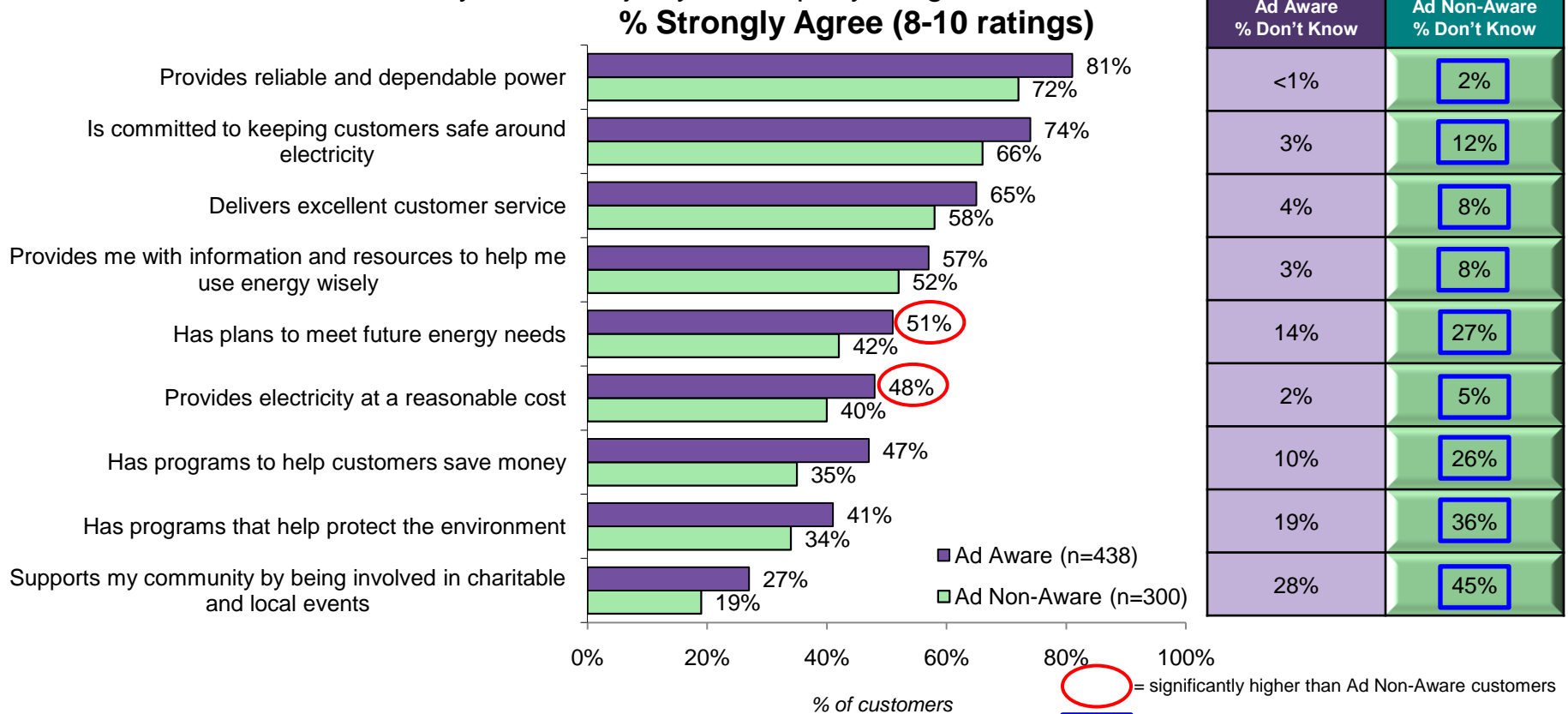
- In 2010, Ad Non-Aware customers are significantly less likely to strongly agree that their utility “provides reliable and dependable power.”



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 2010

- 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 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 2010

(by Utility & Ad Awareness)

- Pacific Power and Rocky Mountain Power Ad Aware customers are more likely than Non Ad-Aware customers to agree with all statements.

Company Image Attributes (% "strongly agree" 8-10 ratings)	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Provides reliable and dependable power	83%	80%	69%	73%
Is committed to keeping customers safe around electricity	76%	73%	61%	69%
Delivers excellent customer service	67%	64%	57%	59%
Provides me with information and resources to help me use energy wisely	62%	52%	50%	53%
Has plans to meet future energy needs	54%	49%	43%	41%
Provides electricity at a reasonable cost	45%	50%	35%	44%
Has programs to help customers save money	49%	45%	35%	35%
Has programs that help protect the environment	42%	40%	37%	31%
Supports my community by being involved in charitable and local events	29%	26%	20%	18%

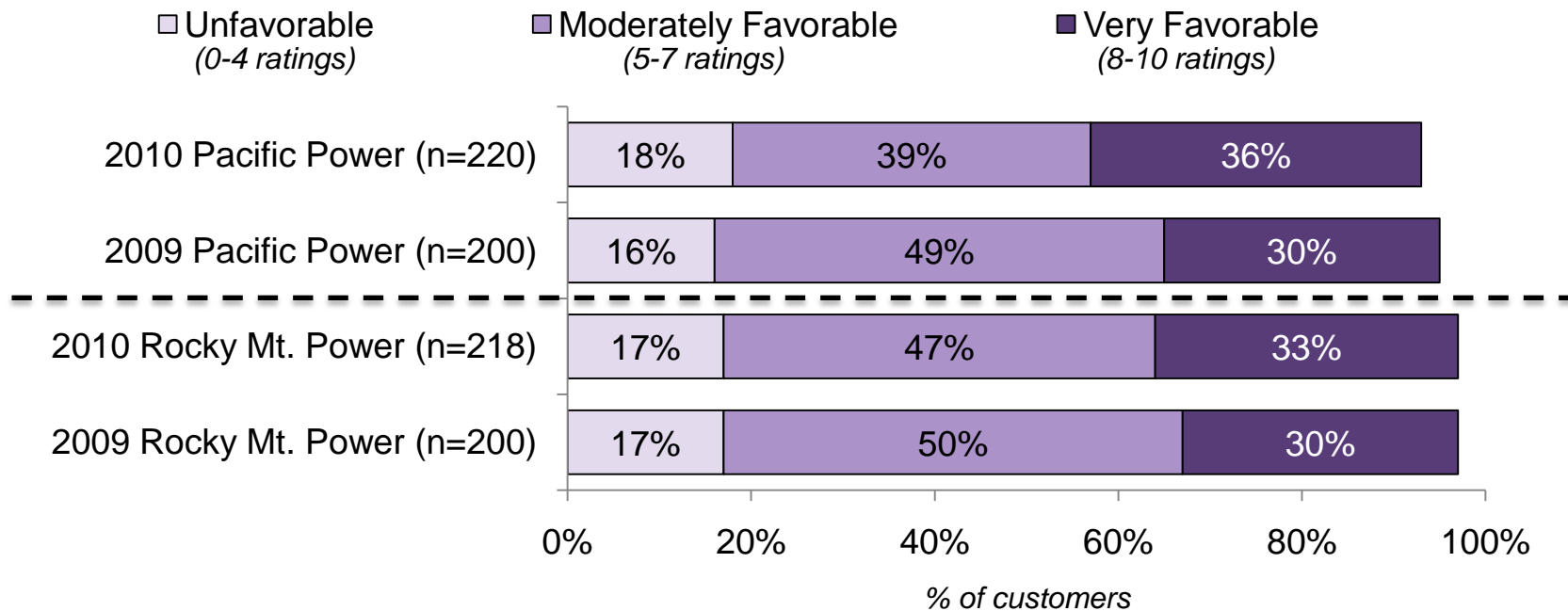
Q19. Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

 = significantly higher than Ad Non-Aware customers

Advertisement's Impact on Company Image 2010 vs. 2009

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

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 2010

Very Favorable (8-10 rating) <i>(n=150)</i>	Moderately Favorable (5-7 rating) <i>(n=190)</i>	Least Favorable (0-4 rating) <i>(n=77)</i>
47% Utility has positive business practices/operations (49%)	34% Rarely see ad/do not affect me/not useful/not necessary (34%)	39% Rarely see ad/do not affect me/not useful/not necessary (70%)
19% Advertisement serves as education to consumers (29%)	21% Utility has positive business practices/operations (20%)	20% Limited choice in utility provider/monopoly (20%)
10% Information is useful to energy habits/usage (25%)	14% Limited choice in utility provider/monopoly (11%)	13% Misleading/fluctuating costs (14%)
9% Information on energy savings/bill minimizing practices (15%)	10% Not convinced of the information given	11% Utility has poor practices/inefficient
8% Rare power outages/quick restoration	5% Advertisement serves as education to consumers	9% Not convinced of the information given (12%)
7% Limited choice in utility provider/monopoly	5% Information is useful to energy habits/usage	
6% Utility provides a necessary service	5% Utility has poor practices/inefficient	

2009 percentages in parenthesis.

Statistical differences are shown in **blue** if significantly higher than 2009 and **red** if significantly lower than 2009.

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

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

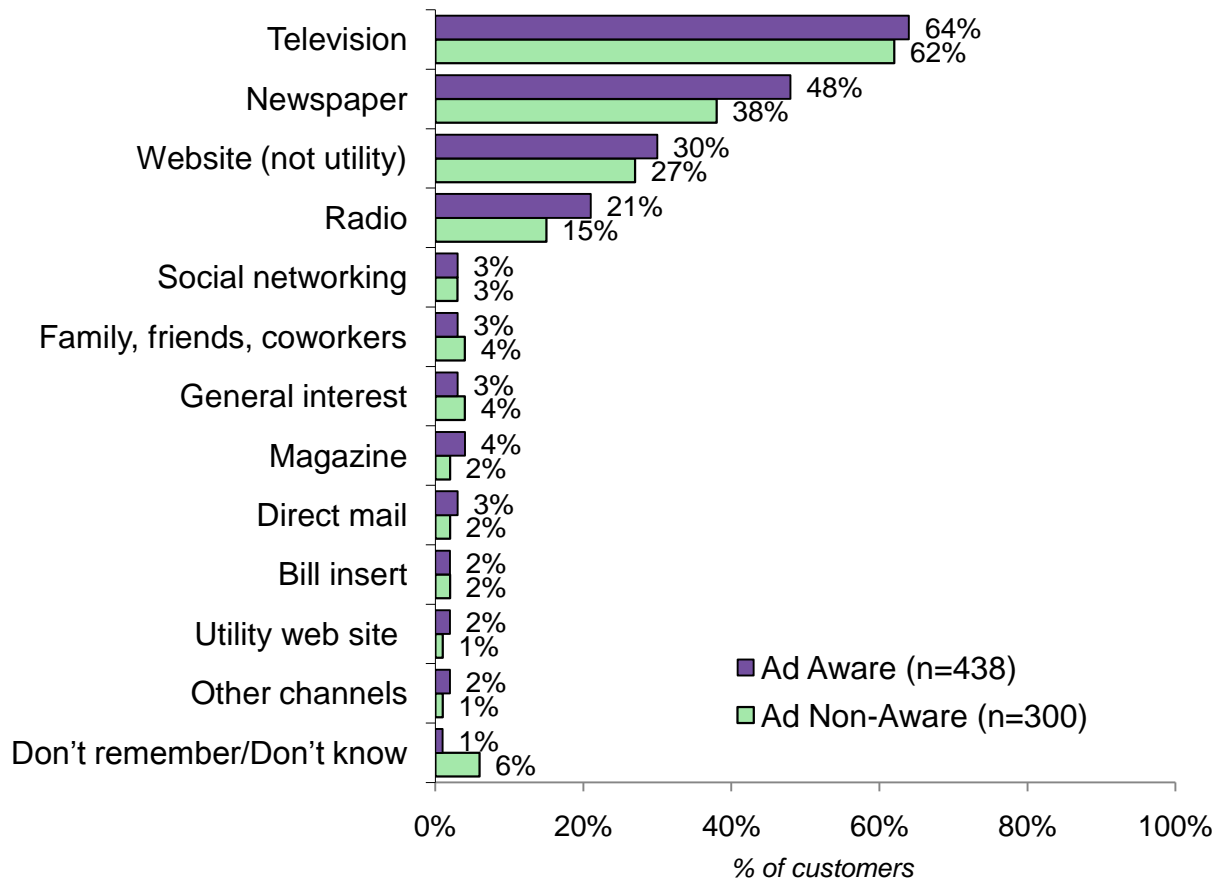


Communication Sources

News & Current Event Sources 2010 vs. 2009

- Sources of news and current events are consistent with last year; television and newspapers remain the primary sources.

2010 News & Current Event Channels



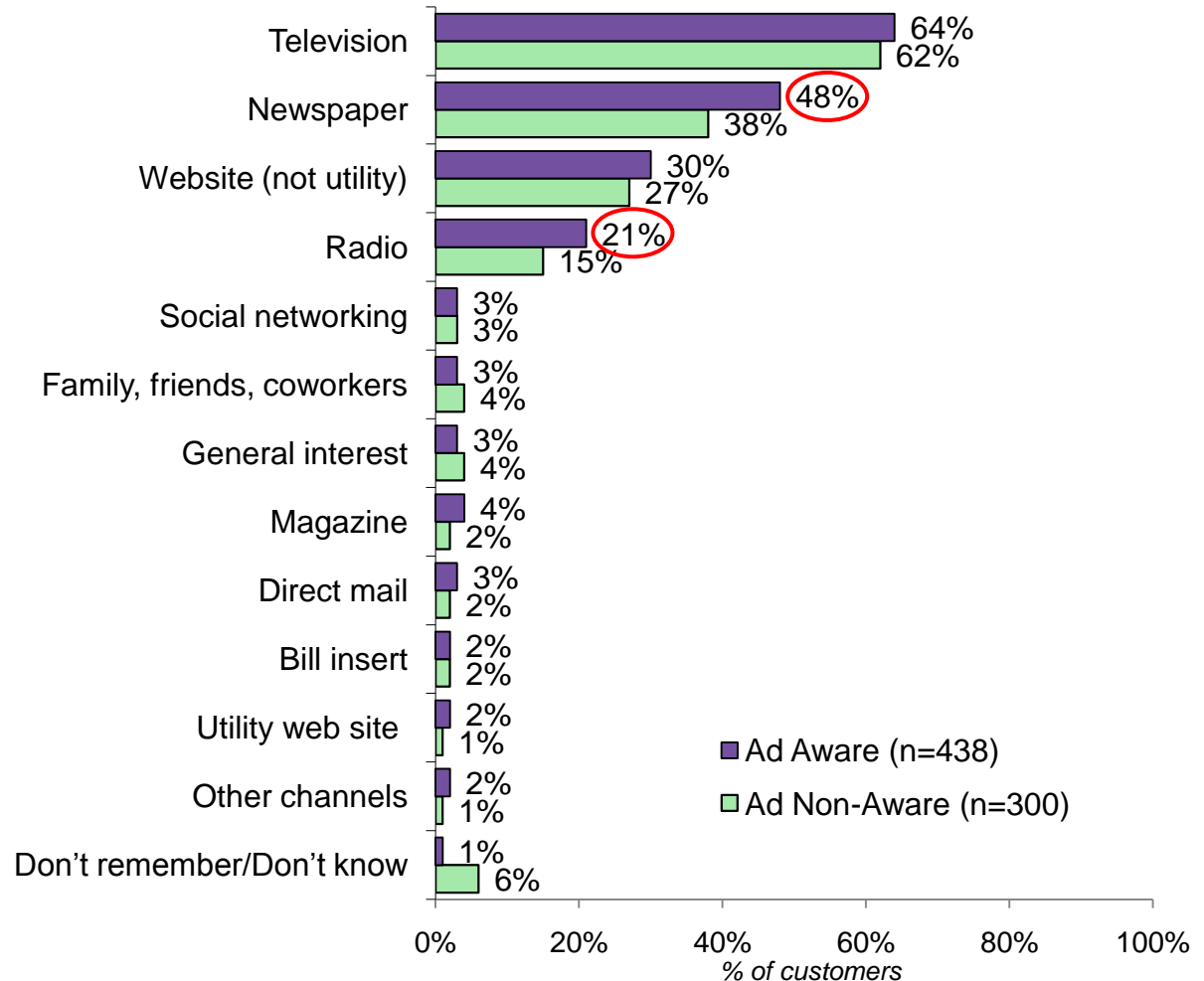
2009 Ad Aware (n=400)	2009 Ad Non-Aware (n=300)
68%	68%
52%	41%
30%	27%
25%	18%
3%	1%
2%	5%
n/a	n/a
5%	2%
3%	3%
3%	2%
3%	3%
1%	4%


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

News & Current Event Sources 2010

- Television and newspapers are the primary sources for news and current events.
- Ad Aware customers are more likely to utilize radio, magazine and utility web sites as news sources.
- Pacific Power customers are significantly more likely to use the newspaper as a news source than Rocky Mountain Power customers.
- Customers age 35 or older favor traditional information channels (television and newspapers) whereas younger customers (age 18-34) are significantly more likely to mention web sites (not utility).

News & Current Event Channels



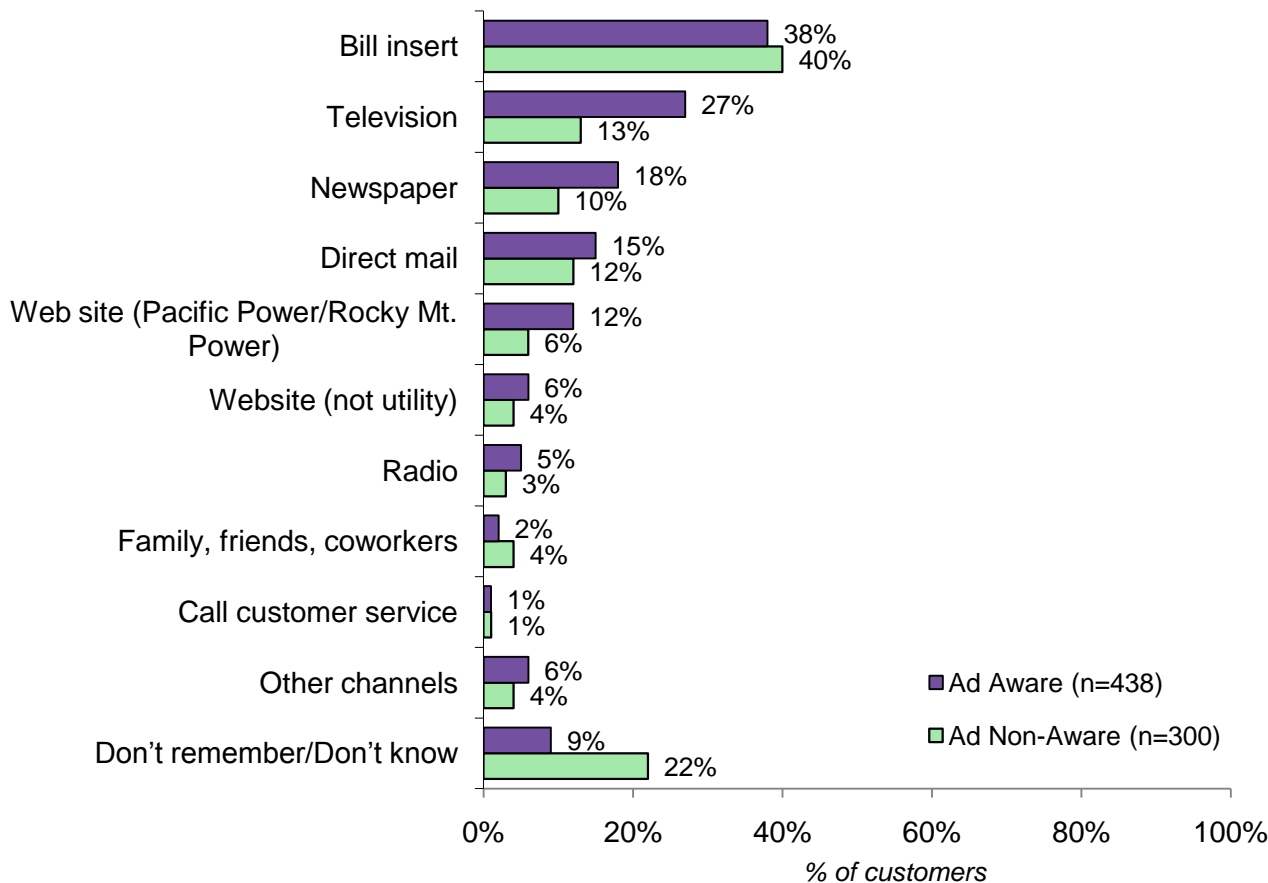
 = significantly higher than Ad Non-Aware customers

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

Utility Information Sources 2010 vs. 2009

- Sources of utility information remains consistent with last year, with bill inserts, television, newspapers and direct mail being the primary sources.

2010 Advertising & Communication Channels



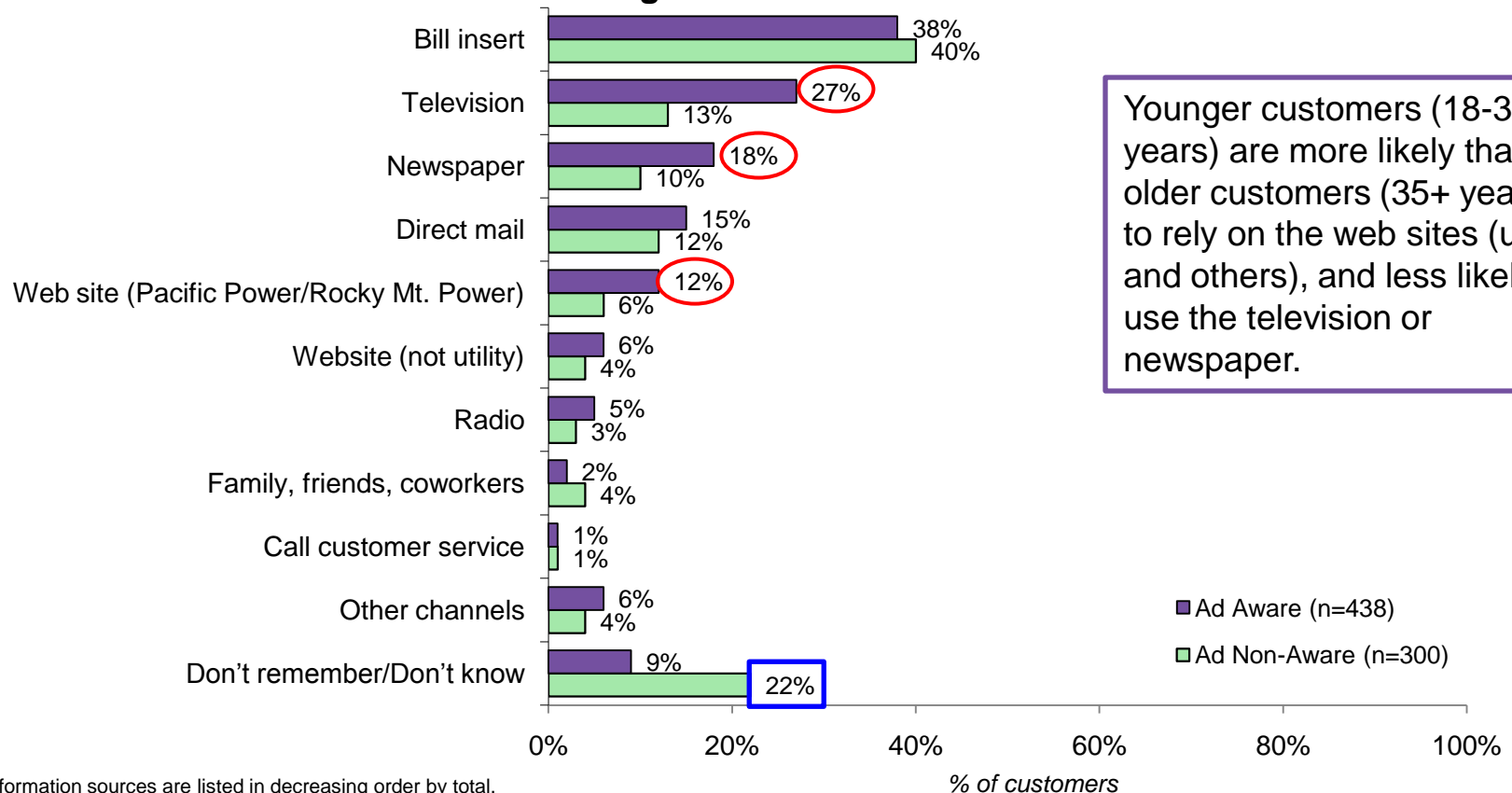
2009 Ad Aware (n=400)	2009 Ad Non-Aware (n=300)
42%	42%
24%	11%
18%	11%
19%	16%
12%	9%
4%	3%
6%	2%
2%	2%
3%	3%
7%	3%
8%	18%

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

Utility Information Sources 2010

- Bill inserts are the primary source for utility information.
- Ad Aware customers are more likely to utilize television, newspaper, and utility web sites 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 web sites (utility and others), and less likely to use the television or newspaper.

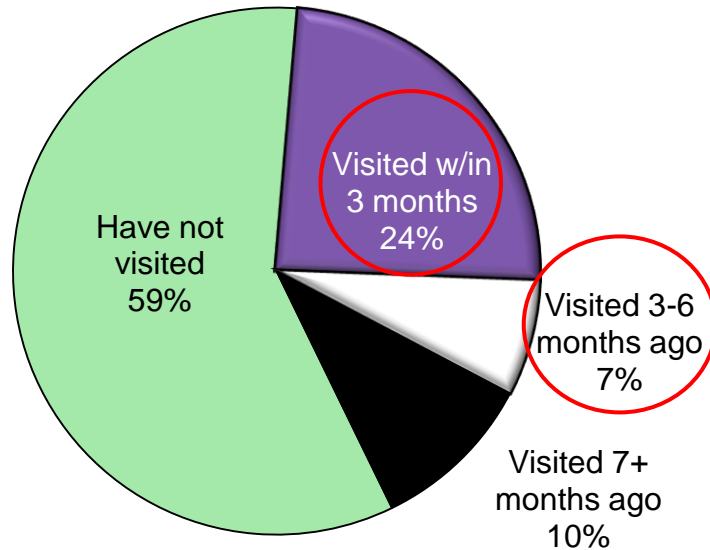
*Information sources are listed in decreasing order by total.

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

Visiting Electric Utility Website

- More than two fifths of Ad Aware and one quarter of Ad Non-Aware customers have visited their electric utility's website, a slight increase since 2009.
- Of those who have visited their utility's web site, more than half visited in the past three months.

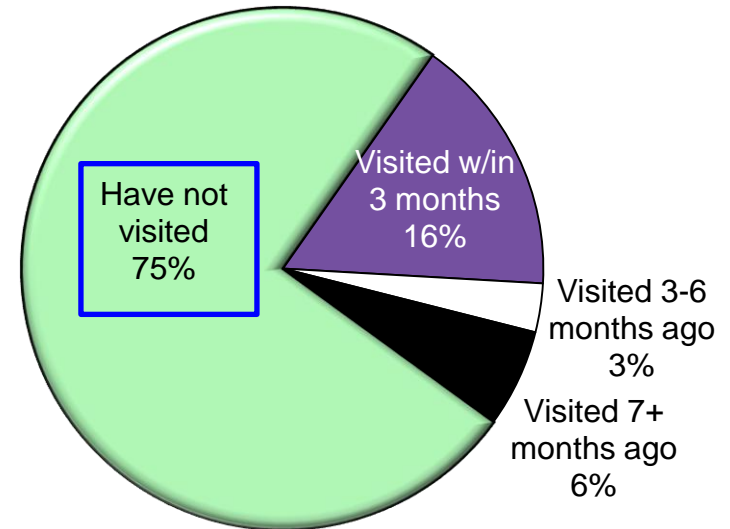
Ad Aware
(n=438)



2009 Ad Aware


- Have not visited: 62%
- Have visited: 38%


Ad Non-Aware
(n=300)



2009 Ad Non-Aware

- Have not visited: 76%
- Have visited: 24%

 = significantly higher than Ad Non-Aware customers

 = significantly higher than Ad Aware customers

Q22/Q23. Have you ever visited the UTILITY website? When was the last time you visited the UTILITY website?

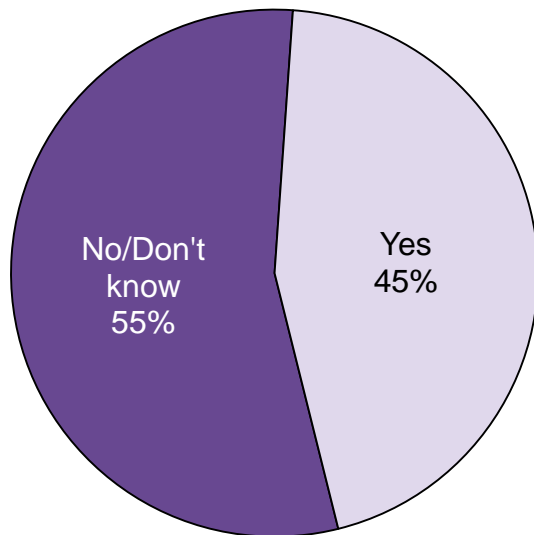


Oregon Energy Efficiency Programs

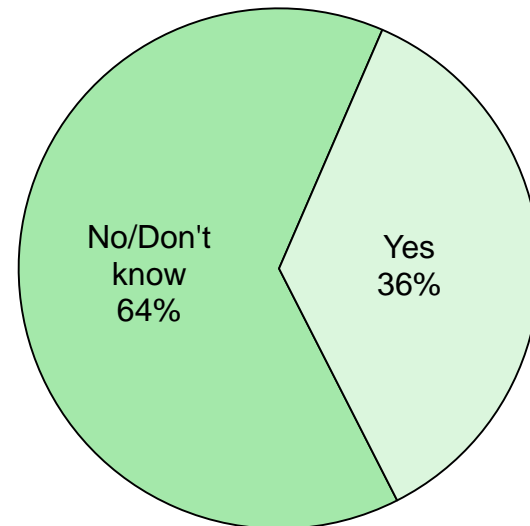
Awareness of Energy Efficiency Programs

- Roughly two fifths of Oregon customers are aware of Pacific Power’s energy efficiency programs.
- Those aware of the energy efficiency programs are more likely than those not aware to:
 - Recall the “Let’s Turn the Answers On” slogan;
 - Have a more favorable opinion of Pacific Power based on the ads;
 - Have high satisfaction with Pacific Power; and
 - Heard of and are aware of the partnership between Energy Trust of Oregon and Pacific Power.

Ad Aware
(n=163)



Ad Non-Aware
(n=118)

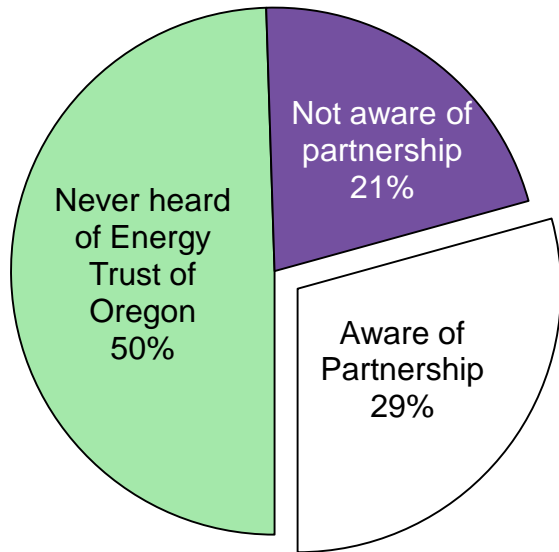


OR1. Are you aware of any energy efficiency programs that are currently offered by Pacific Power to help you save electricity and lower your bill?

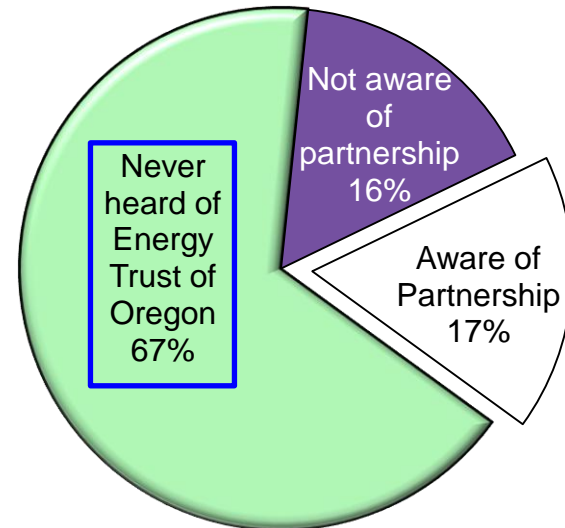
Energy Trust of Oregon

- Approximately half of Ad Aware customers have heard of the Energy Trust of Oregon and roughly one third are aware of the partnership with Pacific Power.
- Ad Non-Aware customers are significantly less likely to have heard of the Energy Trust of Oregon, with only one in five aware of the partnership with Pacific Power.

Ad Aware
(n=163)



Ad Non-Aware
(n=118)



= significantly higher than Ad Aware customers

OR2. Have you ever heard of the Energy Trust of Oregon?

OR3. Are you aware that Pacific Power and the Energy Trust of Oregon work together as partners on energy efficiency programs for Oregon utility customers?

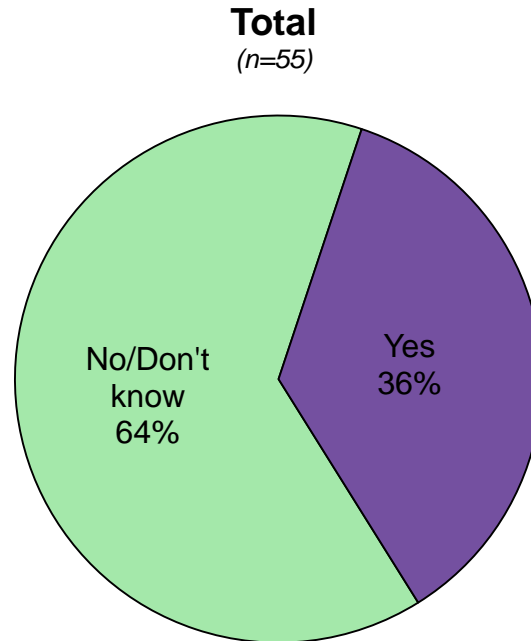


Washington Energy Efficiency Programs

Caution: Small sample sizes

Awareness of Energy Efficiency Programs

- More than one third of Washington customers are aware of the energy efficiency programs offered by Pacific Power.

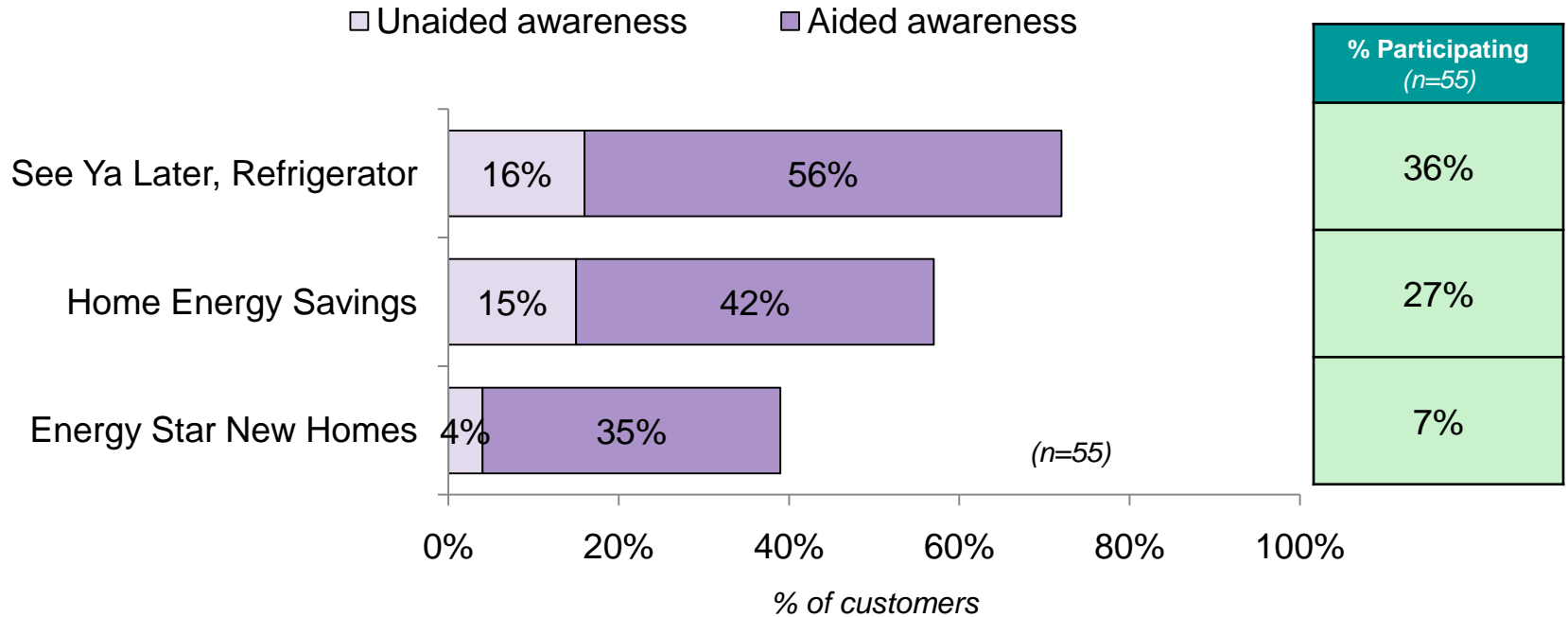


WA1. Are you aware of any energy efficiency programs that are currently offered by Pacific Power to help you save electricity and lower your bill?

Program Awareness & Participation

- See Ya Later, Refrigerator has the highest program awareness and participation.
- The Energy Star new Homes program has significantly lower participation than the other two programs.

Program Awareness



WA2. What energy efficiency programs are you aware of that are currently offered by Pacific Power?

WA3. Now I'm going to read a description of some energy efficiency programs that are currently offered by Pacific Power. Before now, were you aware of this energy efficiency program?



WA4. Have you ever participated in PROGRAM?



2010 Demographics

Demographics

Customer Tenure	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
1-4 years	27%	19%	21%	27%
5-9 years	14%	16%	14%	18%
10-14 years	10%	16%	11%	13%
15-19 years	10%	11%	8%	8%
20-24 years	8%	6%	15%	5%
25-29 years	6%	3%	2%	3%
30-39 years	13%	15%	12%	12%
40-49 years	6%	5%	9%	4%
50+ years	6%	10%	9%	11%

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

Demographics

Age	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
18-34	26%	28%	14%	19%
35-54	29%	30%	30%	34%
55+	44%	41%	52%	47%
Refused	1%	<1%	4%	1%



Income	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Less than \$15,000	13%	7%	14%	9%
\$15-\$30,000	20%	13%	22%	15%
\$30-\$50,000	19%	21%	11%	17%
\$50-\$75,000	15%	22%	13%	19%
\$75-\$100,000	8%	11%	10%	13%
Over \$100,000	9%	14%	8%	11%
Don't know	3%	1%	6%	3%
Refused	13%	11%	15%	14%

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

Demographics

Education	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Less than high school	4%	1%	5%	4%
High school graduate	25%	29%	33%	25%
Some college	25%	23%	19%	22%
Undergraduate college degree	10%	15%	9%	15%
Some graduate school	8%	5%	9%	5%
Completed graduate school	25%	22%	20%	22%
Trade or technical school graduate	3%	3%	1%	5%
Don't know	<1%	<1%	1%	1%
Refused	1%	1%	4%	1%

Gender	Ad Aware		Ad Non-Aware	
	Pacific Power (n=220)	Rocky Mt. Power (n=218)	Pacific Power (n=150)	Rocky Mt. Power (n=150)
Male	47%	57%	49%	45%
Female	53%	43%	51%	55%

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