



Customer Awareness Advertising Campaign Research

Pacific Power and Rocky Mountain Power

Prepared by

Jakob Lahmers

MDC Research

(503) 245-4479

JakobL@mdcresearch.com



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 seventh wave, conducted in May 2015.

Methodology

- A total of seven hundred (n=713) interviews were conducted with residential customers, evenly divided between Pacific Power and Rocky Mountain Power.
 - The interviews were conducted by telephone between May 21, and June 3, 2015. All participants were interviewed by MDC Research’s in-house Research Associates.
 - A list of 50,000 Pacific Power and Rocky Mountain Power residential customers was provided by PacifiCorp.
- All respondents were screened to meet the following criteria:
 - Customer of Pacific Power or Rocky Mountain Power
 - Involved with decisions regarding electric utility
- A proportionate random sampling plan within each utility was utilized:

Pacific Power (n=361)			Rocky Mountain Power (n=352)		
Aware		Non-Aware	Aware		Non-Aware
n=208		n=153	n=201		n=151
Oregon	Washington	California	Utah	Wyoming	Idaho
n=269	n=68	n=24	n=279	n=47	n=26

- An over sampling of n=138 Washington customers, n=174 Wyoming customers, and n=178 Idaho customers was conducted in order to report on the customer base for each state independently. The Washington, Wyoming and Idaho oversamples are excluded from the primary findings, and covered in separate reports.

Methodology (cont.)

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

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

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

- The maximum sampling variability for each customer segment at the 95% confidence level is shown below:
 - Total (n=713) yields a maximum sample variability of +/-3.7% at the 95% confidence level.
 - Pacific Power (n=361) yields a maximum sample variability of +/-5.2% at the 95% confidence level.
 - Rocky Mountain Power (n=350) yields a maximum sample variability of +/-5.2% at the 95% confidence level.
 - Ad Aware (n=409) yields a maximum sample variability of +/-4.8% at the 95% confidence level.
 - Ad Aware by Pacific Power (n=208) yields a maximum sample variability of +/-6.7% at the 95% confidence level.
 - Rocky Mountain Power (n=201) yields a maximum sample variability of +/-6.9% at the 95% confidence level.
 - Ad Non-Aware (n=304) yields a maximum sample variability of +/-5.6% at the 95% confidence level.
 - Ad Non-Aware by Pacific Power (n=153) yields a maximum sample variability of +/-7.9% at the 95% confidence level.
 - Rocky Mountain Power (n=151) yields a maximum sample variability of +/-8.0% at the 95% confidence level.



Company & Advertising Awareness

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

Top of Mind Unaided Company Awareness 2015

- Four fifths (83%) of Pacific Power Ad Aware customers and three quarters (78%) of Rocky Mountain Power Ad Aware customers mentioned their electric utilities first.
- Among those Ad Non-Aware, two thirds of Pacific Power customers (71%) and Rocky Mountain Power customers (68%) mention their utility first.

2015 Company Awareness* <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=293)	Rocky Mt. Power (n=396)	Pacific Power (n=197)	Rocky Mt. Power (n=183)
Pacific Power/PPL	83%	2%	71%	1%
Rocky Mountain Power/Utah Power	--	78%	2%	68%
Pacific Gas & Electric/PG&E	6%	1%	10%	3%
NW Natural	2%	--	5%	--
Portland General/PGE	1%	--	2%	--
Avista	1%	--	3%	--
PacifiCorp	1%	1%	1%	--
Mountain Fuel/Questar	<1%	14%	1%	19%
Other	2%	2%	2%	2%
None	--	--	--	1%

*Utilities are listed in decreasing order according to Pacific Power top of mind, except for RMP

 = significantly higher than Ad Non-Aware customers

 = significantly higher than Ad Aware customers

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

Total Unaided Company Awareness 2015

- Ad Aware customers show significantly higher awareness of Pacific Power and Rocky Mountain Power than their Ad Non-Aware counterparts.

2015 Company Awareness* (Top of mind + others = total awareness)	Ad Aware		Ad Non-Aware	
	Pacific Power (n=293)	Rocky Mt. Power (n=396)	Pacific Power (n=197)	Rocky Mt. Power (n=183)
Pacific Power/PPL	91%	4%	85%	3%
Rocky Mountain Power/Utah Power	1%	91%	3%	83%
Pacific Gas & Electric/PG&E	10%	2%	13%	3%
NW Natural	8%	<1%	18%	--
Cascade	11%	--	7%	--
Avista	8%	--	10%	--
Portland General/PGE	5%	1%	4%	--
Mountain Fuel/Questar	<1%	58%	1%	51%
Other	5%	5%	4%	4%

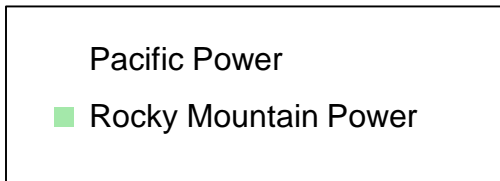
*Utilities are listed in decreasing order according to Pacific Power top of mind, except for RMP

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

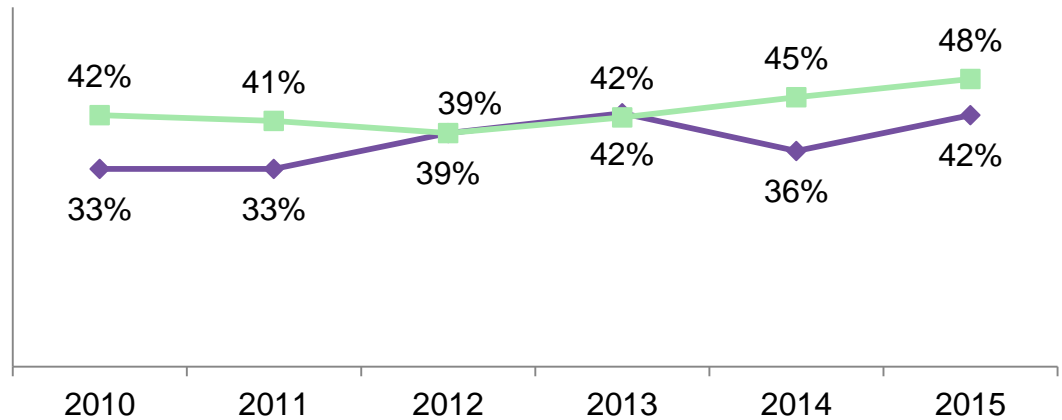
Q1/Q2 When you think of electric or gas utilities, what electric or gas utilities come to mind?

Unaided Advertisement Awareness 2010-2015

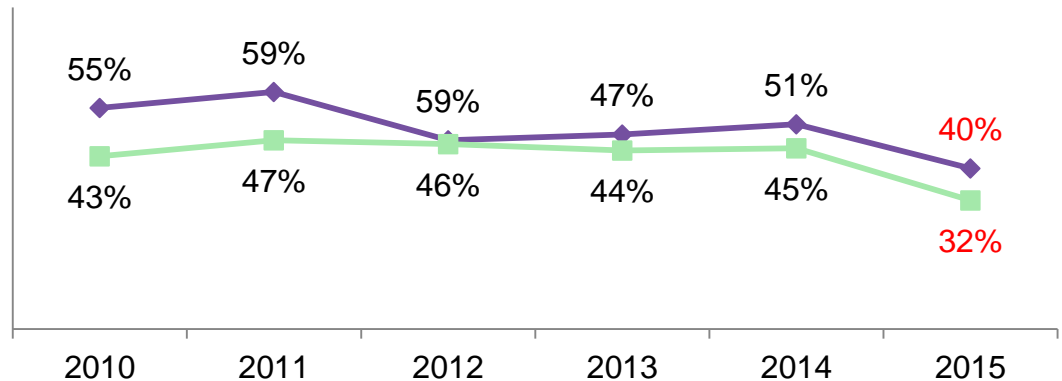
- Unaided advertising or communications awareness among both Rocky Mountain Power and Pacific Power is statistically consistent with last year.
- In 2015, there is a significant decrease among those who were not aware of any utility communications for both companies.



% Unaided Utility Communication Awareness



% Unaided Not Aware of Any Utility Communications



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

Unaided Advertisement Awareness 2015

- Almost half of Pacific Power (42%) and of Rocky Mountain Power (48%) customers recall an advertisement or communication from their electric company during the past six months (unaided).
- Almost one-third (29%) of Rocky Mountain Power customers have unaided recall of Mountain Fuel/Questar advertisements.

2015 Unaided Ad Awareness	Pacific Power (n=490)	Rocky Mt. Power (n=579)
Pacific Power/PPL	42%	1%
NW Natural	4%	<1%
Pacific Gas & Electric/PG&E	4%	--
Avista	2%	--
Portland General/PGE	2%	--
PacifiCorp	<1%	1%
Rocky Mountain Power/Utah Power	<1%	48%
Mountain Fuel/Questar	--	29%
Other	3%	2%
None	49%	41%

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

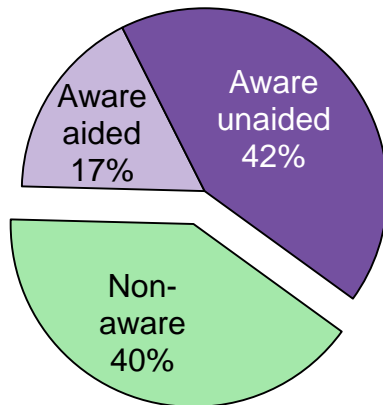
Q3 *During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?*

Total Advertisement Awareness

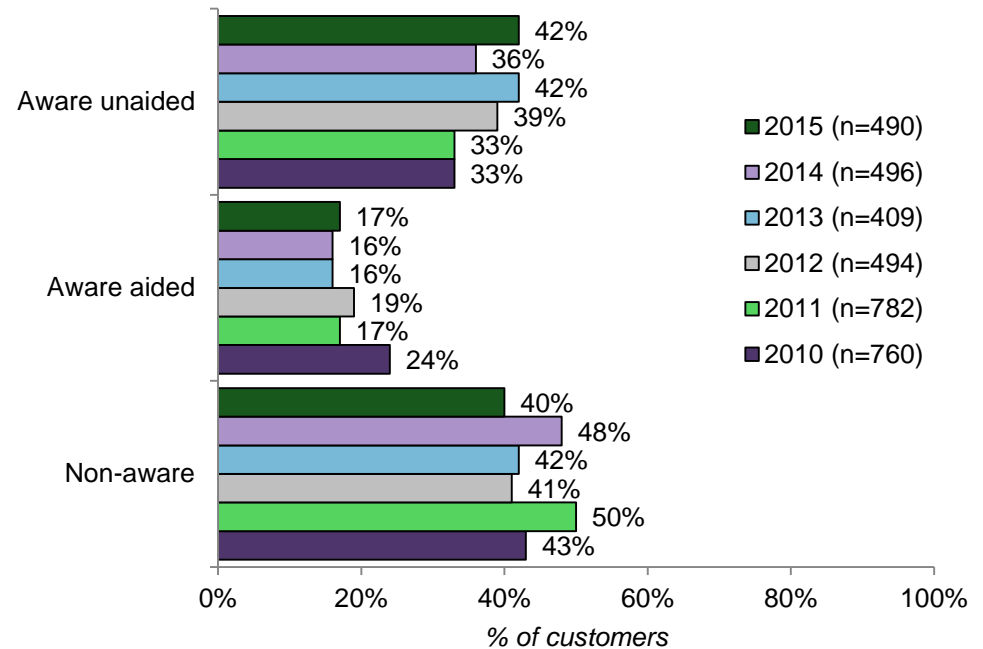
Pacific Power

- Total advertising recall combines unaided recall (previous pages) and aided recall of advertisements or communications during the past 6 months.
- In total, over half (59%) of Pacific Power customers are aware of the company's advertisements or communications, a slight (but not statistically significant) increase from 2014 (52%) and 2013 (58%) awareness.

2015 Pacific Power
(n=490)



Advertisement Awareness



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

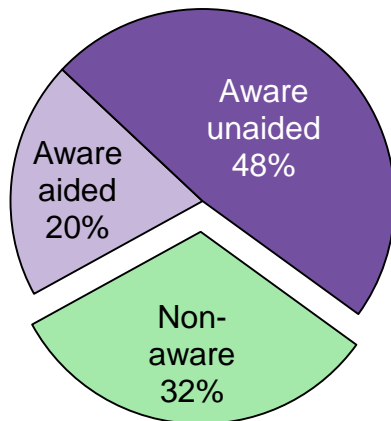
Q4 During the past six months, do you recall seeing, hearing or reading any form of advertisements or communications from UTILITY?

Total Advertisement Awareness Rocky Mountain Power

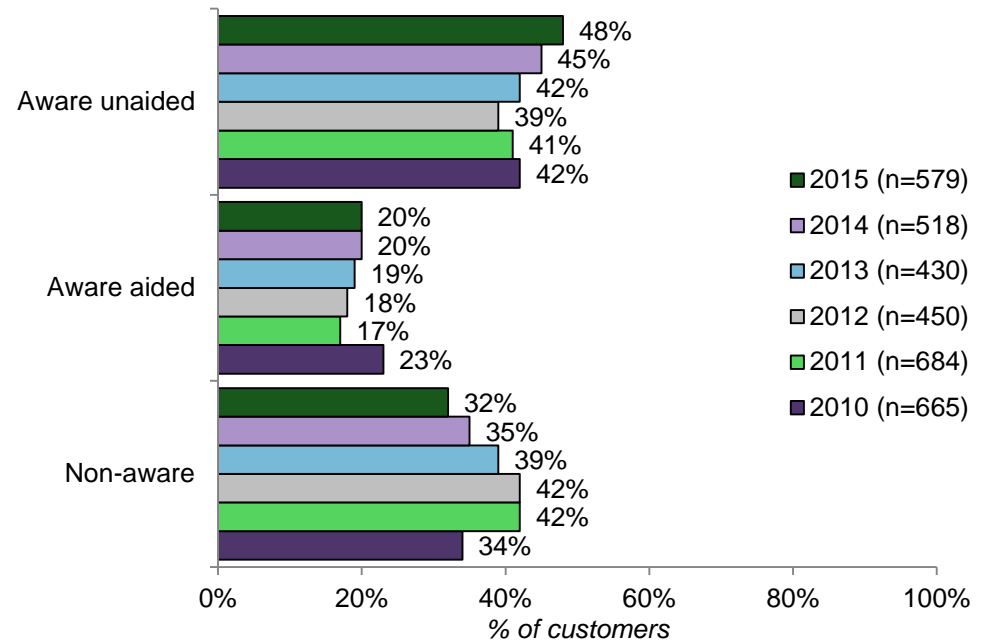
- In total, two thirds (68%) of Rocky Mountain Power customers are aware of the company's advertisements or communications, slightly higher than 2014 awareness.

2015 Rocky Mountain Power

(n=579)



Advertisement Awareness

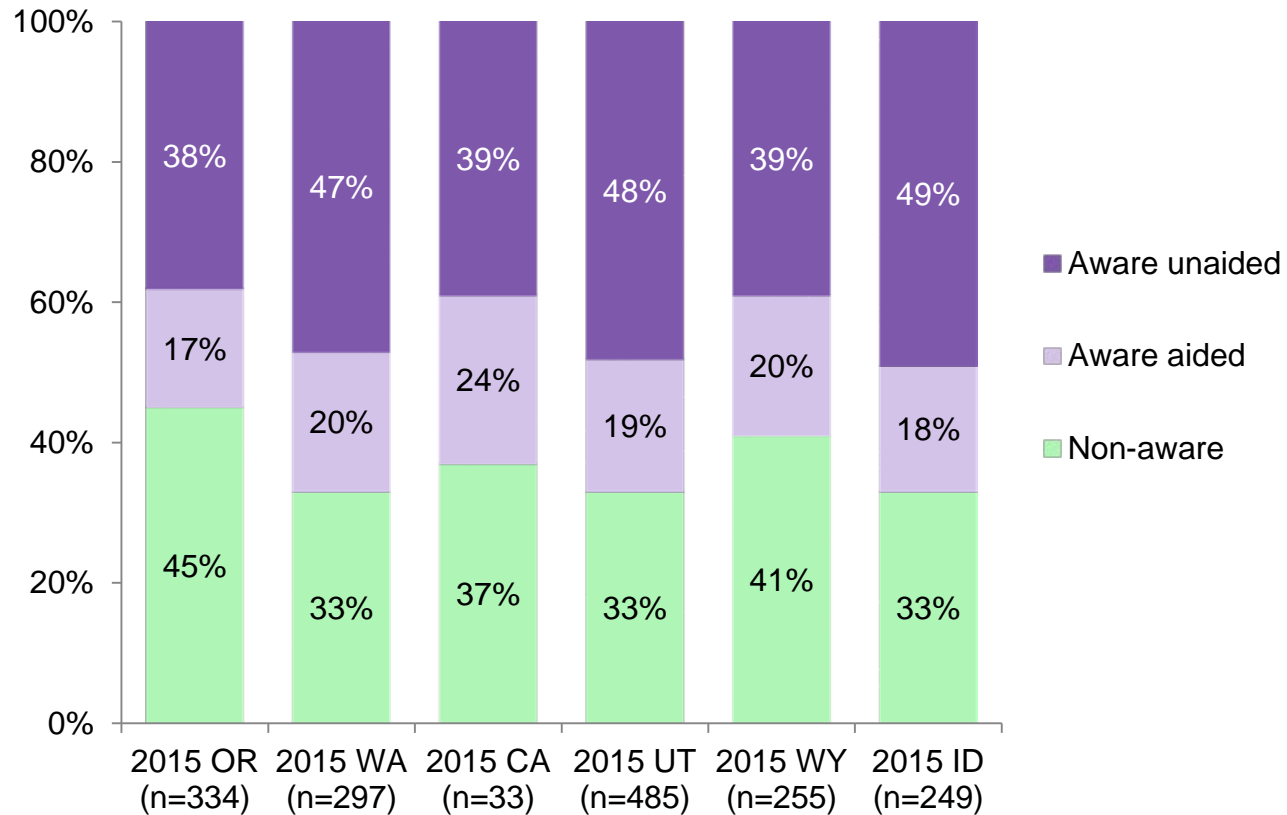


Q3 During the past six months, from what electric or gas companies do you recall seeing, hearing or reading any form of advertisements or communications?

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

Total Advertisement Awareness By State

- Two thirds of customers are aware of Pacific Power or Rocky Mountain Power advertisements or communications in WA, CA, UT and ID. Awareness is slightly lower in OR and WY.



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

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

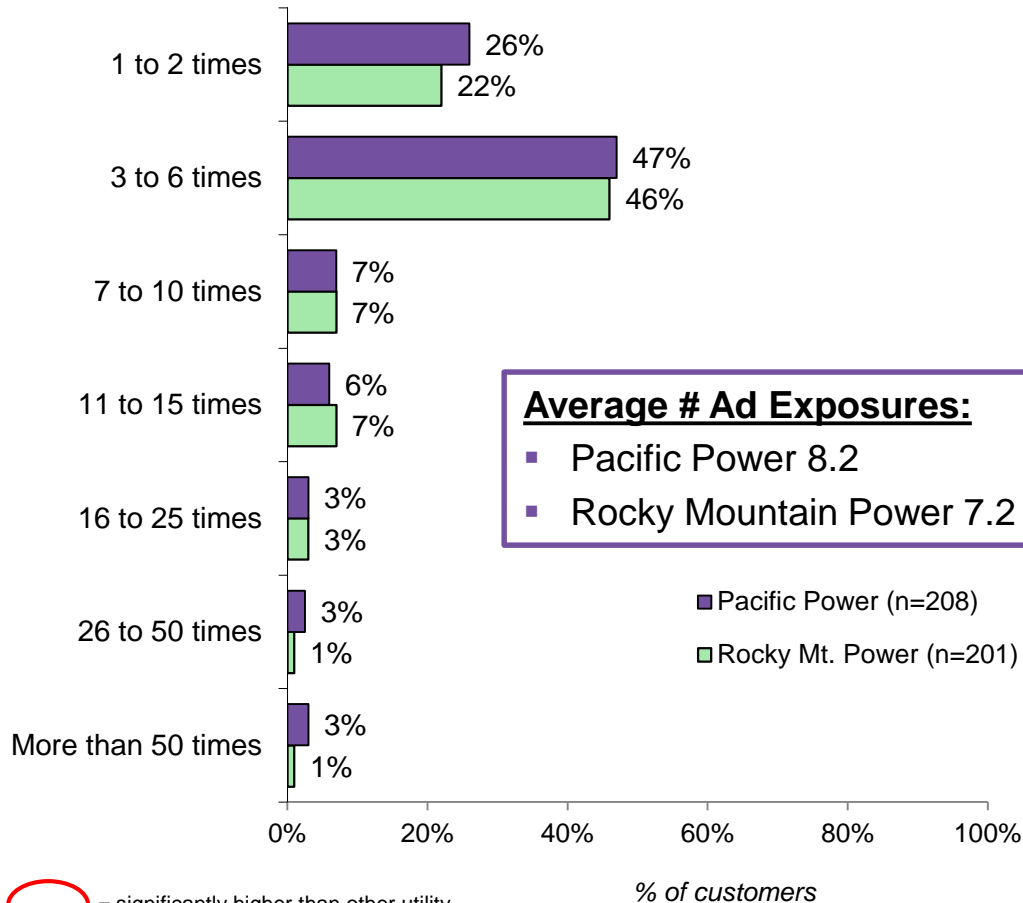


Advertising & Communication Recall

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

Advertising Exposure Recall

2015 Number of Recalled Advertising Exposures



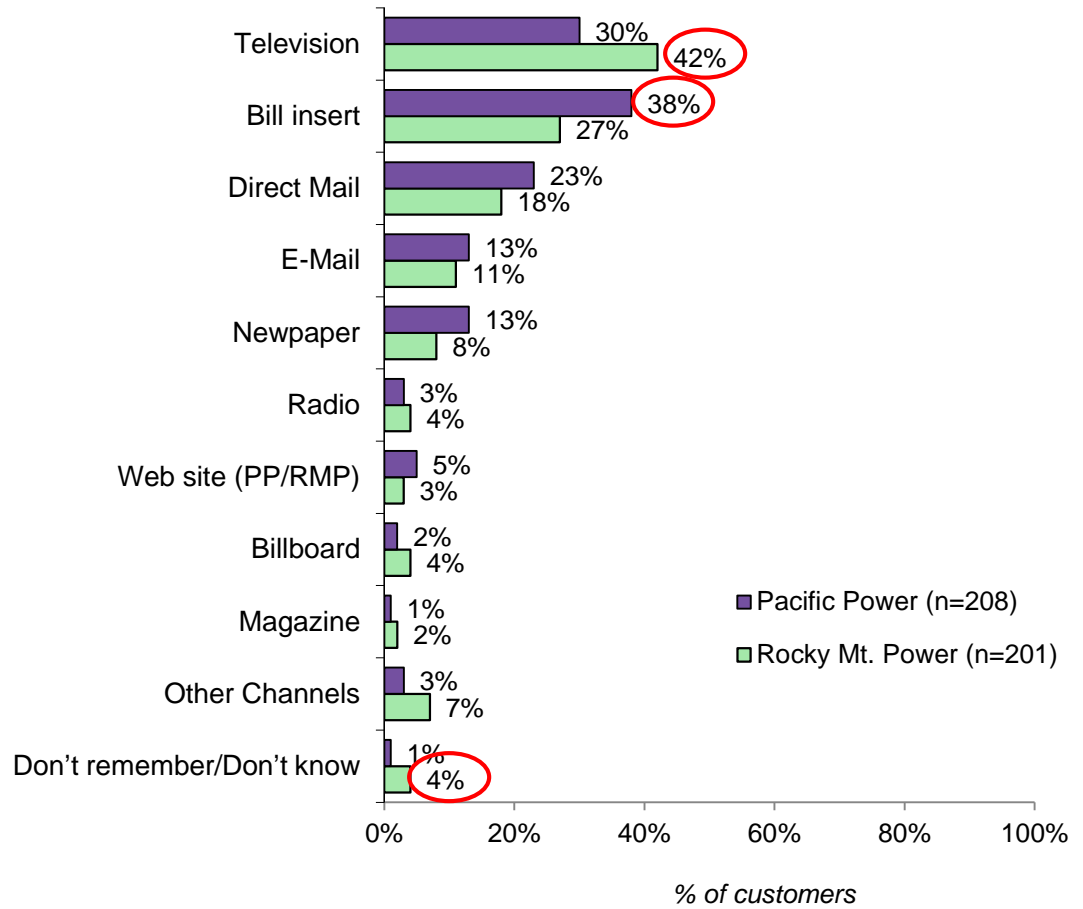
- The average number of advertising exposures recalled among Rocky Mountain Power customers showed a decrease from 2014 (12.3 to 7.2 respectively).
- The average number of advertising exposures among Pacific Power customers showed a slight increase from 2014 (7.1 to 8.2 respectively)

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

Advertising & Communication Channels 2015

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

2015 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 2015

- Overall, “using energy wisely” and “energy efficiency programs” are the most widely recalled messages.
- Pacific Power customers are significantly more likely to recall messages with content about “renewable or alternative energy” (unaided + aided), “billing and energy assistance” (unaided + aided), and “Blue Sky program” (unaided + aided).
- Rocky Mountain Power customers are significantly more likely to recall messages with content about “being Wattsmart” (unaided + aided), and “electrical safety” (unaided).

Messages Recalled	Pacific Power (n=208)			Rocky Mt. Power (n=201)		
	Unaided	Aided	Total	Unaided	Aided	Total
Using energy wisely	17%	44%	61%	18%	41%	59%
Energy efficiency programs	15%	42%	57%	13%	42%	55%
Renewable or alternative energy	8%	43%	51%	4%	35%	39%
Billing or energy assistance	5%	42%	47%	4%	26%	30%
Blue Sky Program	7%	46%	53%	4%	36%	40%
Being “Wattsmart”	5%	43%	48%	7%	57%	64%
Electrical safety	4%	37%	41%	9%	27%	36%
Preparing for power outages	1%	38%	39%	3%	28%	31%
Working to keep your power on	1%	30%	31%	3%	24%	27%
Programs such as equal pay or customer guarantees	1%	32%	33%	0%	25%	25%
Planning for your future energy needs	1%	28%	29%	1%	20%	21%
Environment friendly (green energy)	1%	--	--	0%	--	--
Don't remember/Don't know	39%	16%	55%	34%	17%	51%

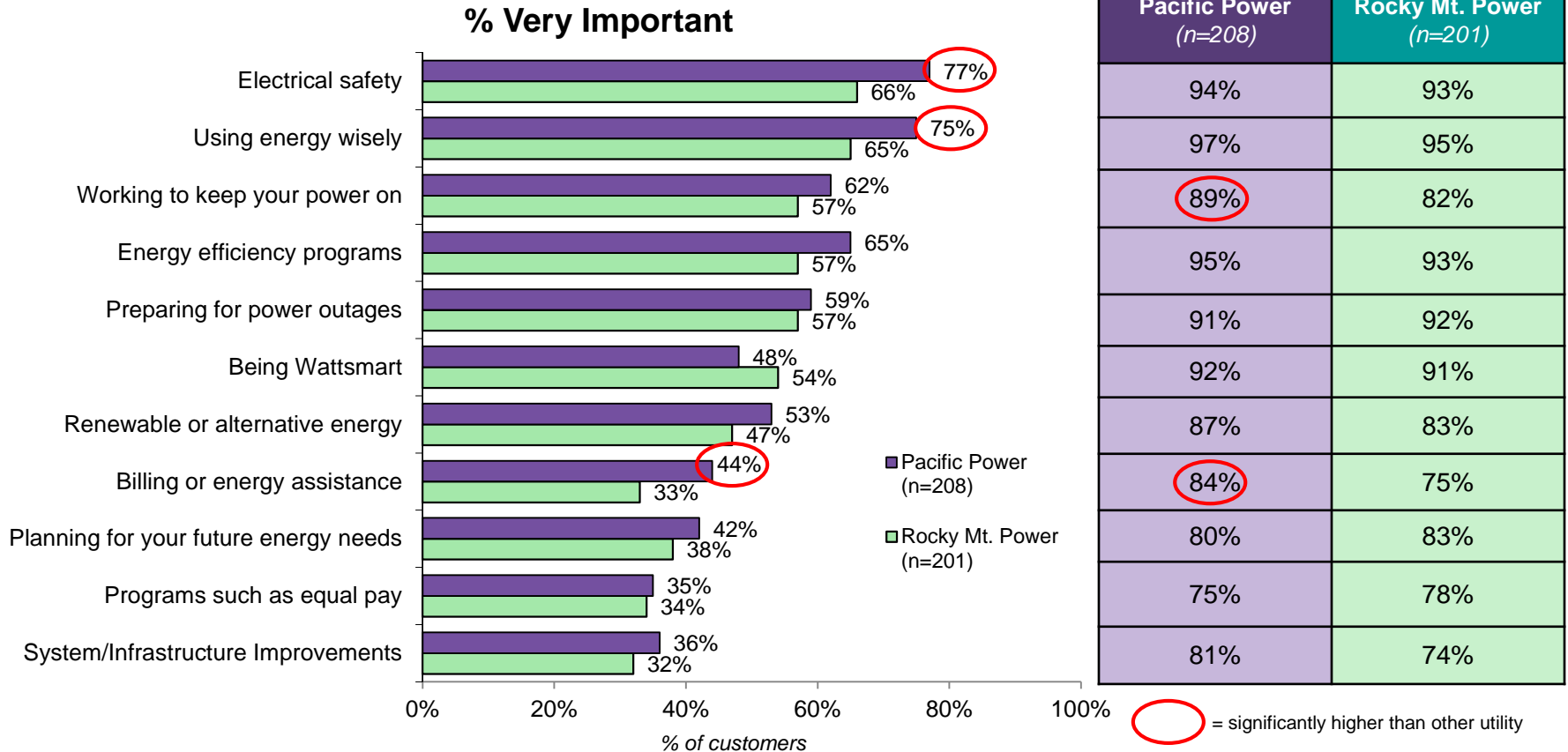
Q6 What types of messages or topics do you remember from UTILITY's advertisements or communications?

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 2015

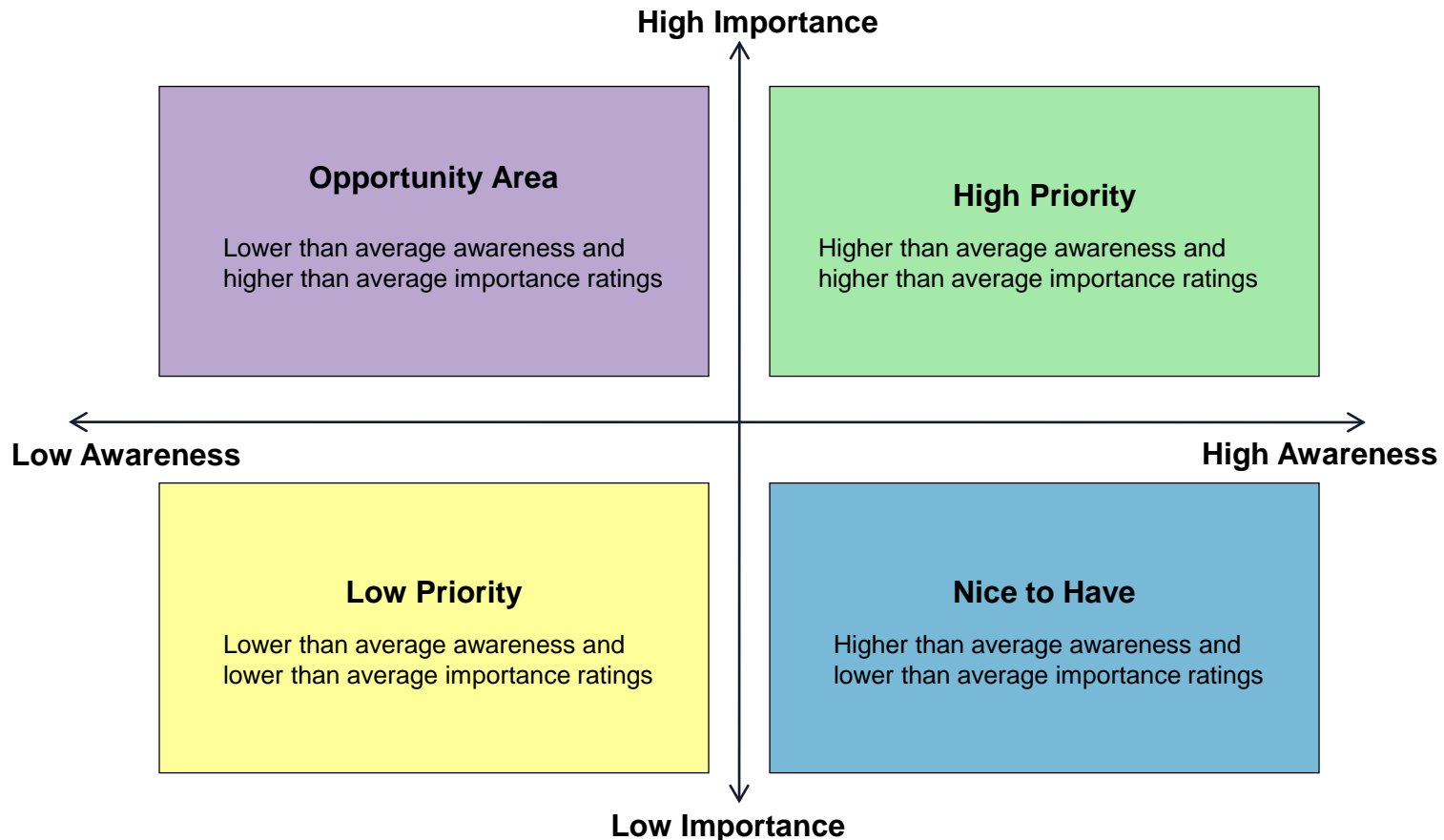
- “Electrical safety” and “using energy wisely” remain the messages most important to customers.
- Pacific Power customers are significantly more likely than Rocky Mountain Power customers to rate “working to keep your power on” and “billing or energy assistance” as very important.



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

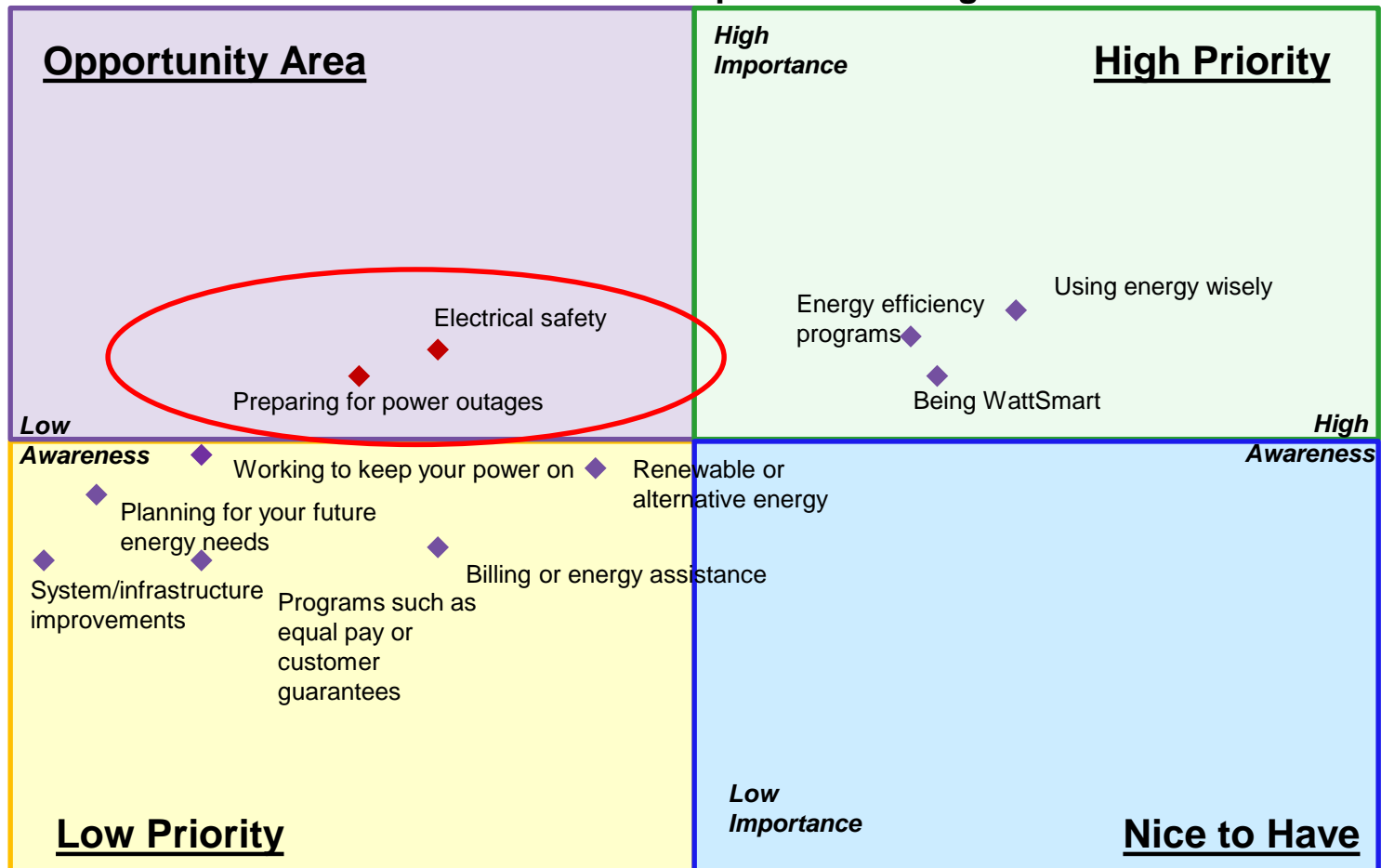
- The following slide presents a quadrant chart outlining the relative importance of each advertising message and the relative awareness of each message.
- Messages considered highly important, but with low awareness, indicate opportunity areas for Pacific Power and Rocky Mountain Power. Increasing awareness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



Message Awareness vs. Importance Ratings 2015

- The messages “preparing for power outages,” and “electrical safety” have higher than average importance, but lower than average awareness, indicating an opportunity area to raise awareness.
 - In 2015, the message “working to keep your power on” moved back out of the opportunity quadrant.

2015 Awareness vs. Importance Ratings



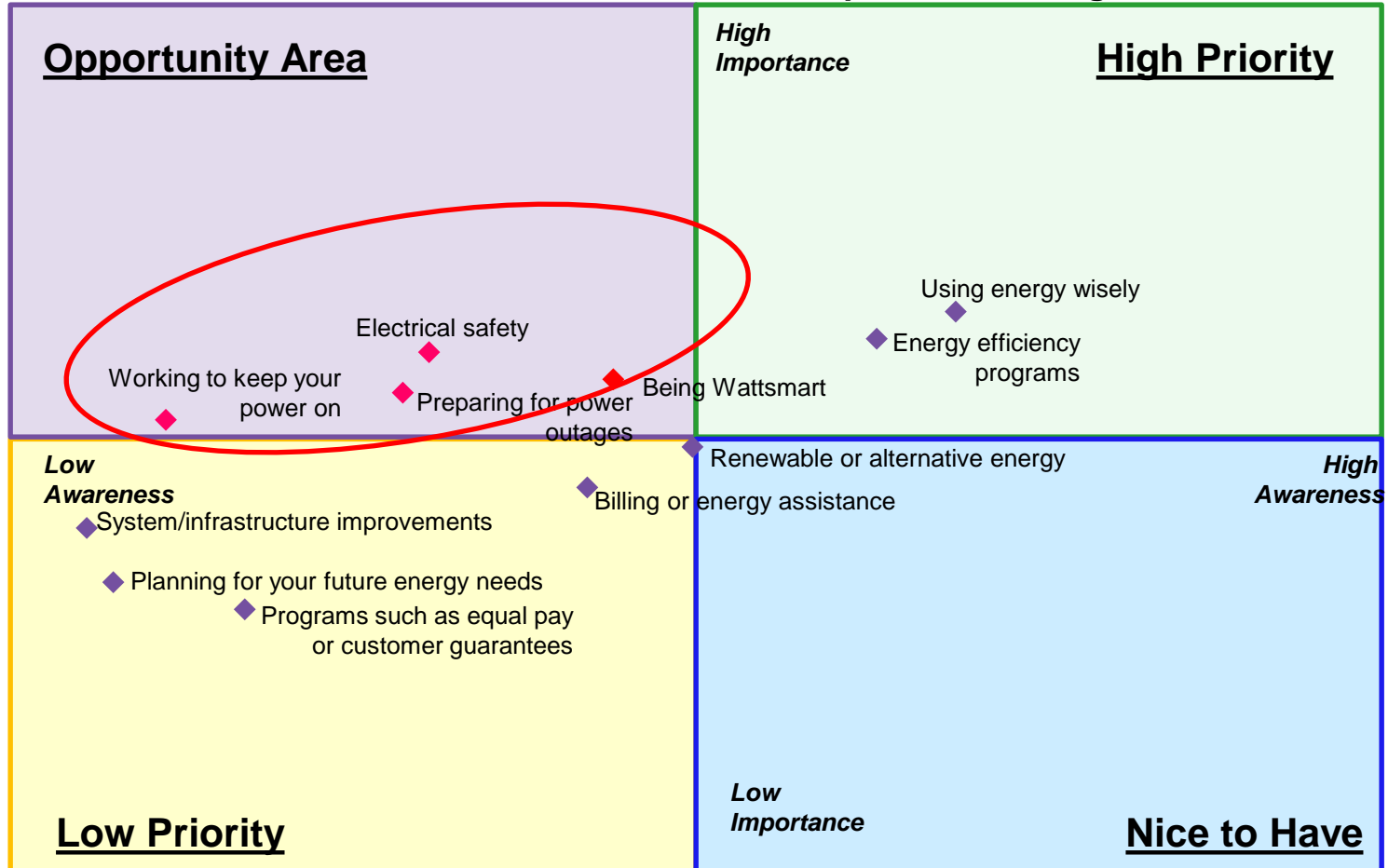


Message Awareness vs. Importance Ratings 2010-2015

	2010	2011	2012	2013	2014	2015
Electrical safety	High Priority	Opportunity Area	Opportunity Area	Opportunity Area	Opportunity Area	Opportunity Area
Preparing for power outages	Opportunity Area	Opportunity Area	Opportunity Area	Opportunity Area	Opportunity Area	Opportunity Area
Working to keep your power on	Opportunity Area	Nice to Have	Opportunity Area	Opportunity Area	Opportunity Area	Low Priority
Using energy wisely	High Priority	High Priority	High Priority	High Priority	High Priority	High Priority
Energy efficiency programs	High Priority	High Priority	High Priority	High Priority	High Priority	High Priority
Being Wattsmart	n/a	High Priority	High Priority	High Priority	High Priority	High Priority
Renewable or alternative energy	High Priority	Nice to Have	High Priority	High Priority	High Priority	Low Priority
Billing or energy assistance	Low Priority	Low Priority	Nice to Have	Low Priority	Nice to Have	Low Priority
Planning for your future energy needs	Opportunity Area	Opportunity Area	Low Priority	Opportunity Area	Low Priority	Low Priority
Programs such as equal pay or customer guarantees	Low Priority	Low Priority	Low Priority	Low Priority	Low Priority	Low Priority
System/infrastructure improvements	Low Priority	Low Priority	Low Priority	Low Priority	Low Priority	Low Priority

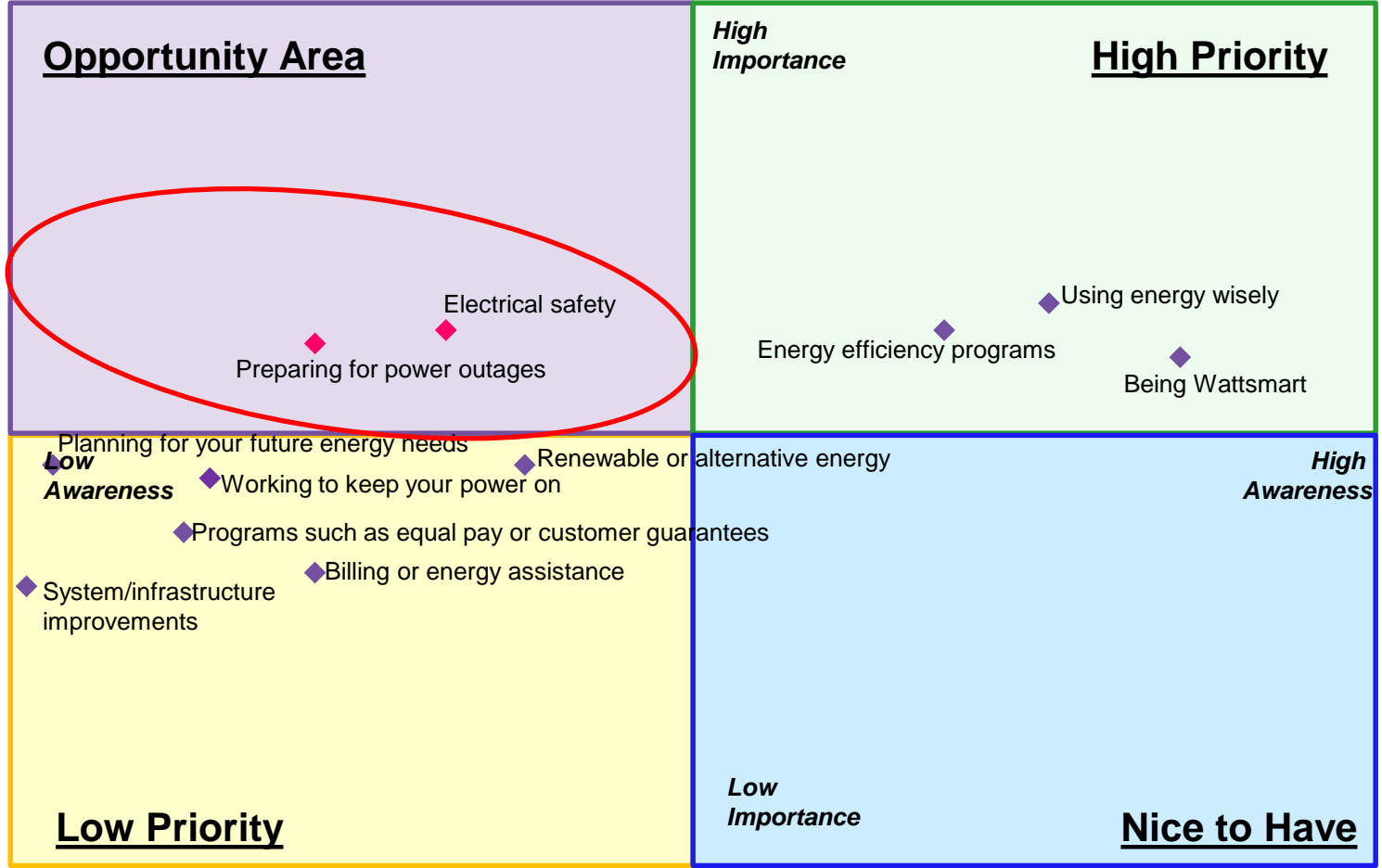
Message Awareness vs. Importance Ratings 2015 – PP

2015 Pacific Power Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2015 – RMP

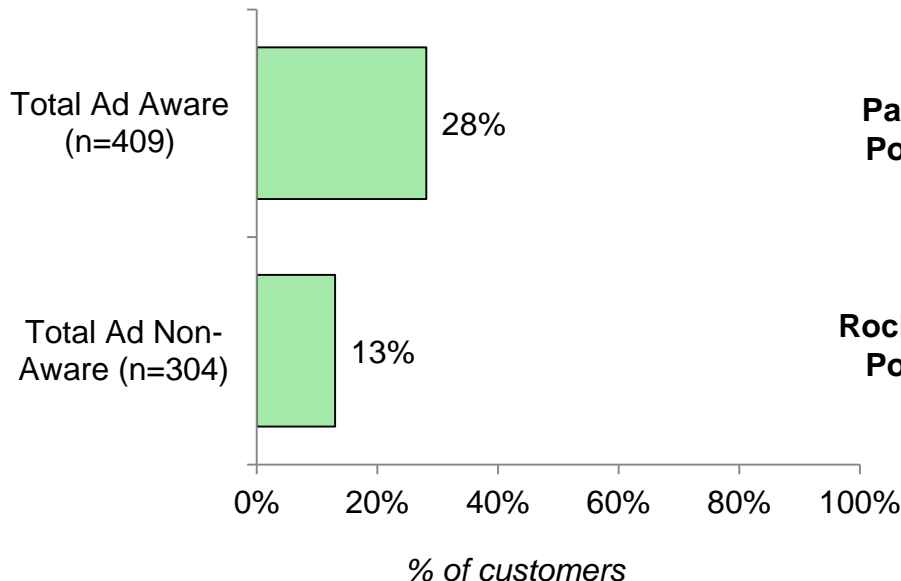
2015 Rocky Mountain Power Awareness vs. Importance Ratings



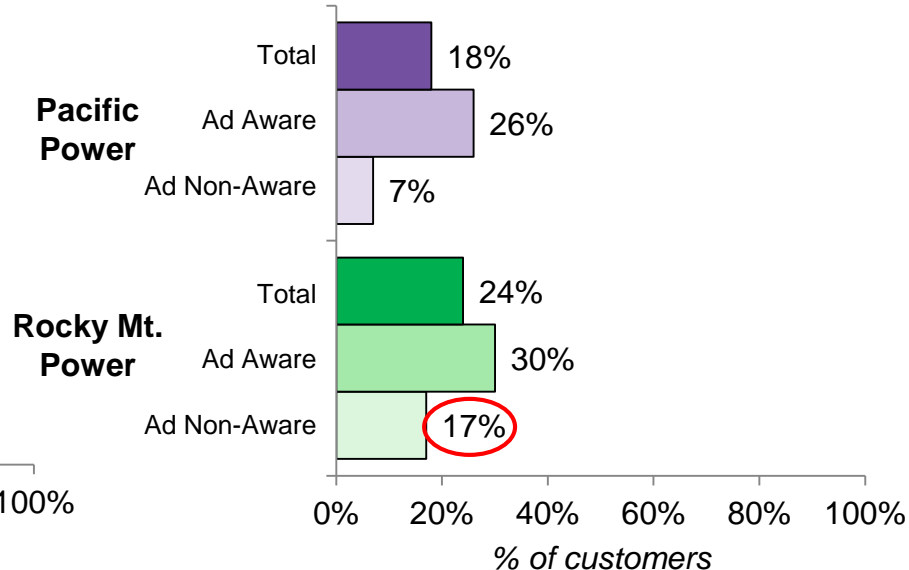
“Let’s Turn the Answers On” 2015


- Just over one quarter (28%) of all Ad Aware customers recall the phrase “Let’s Turn the Answers On.”
 - Rocky Mountain Power Ad Non-Aware customers are significantly more likely to recall the phrase than Pacific Power Ad Non-Aware customers.

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



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



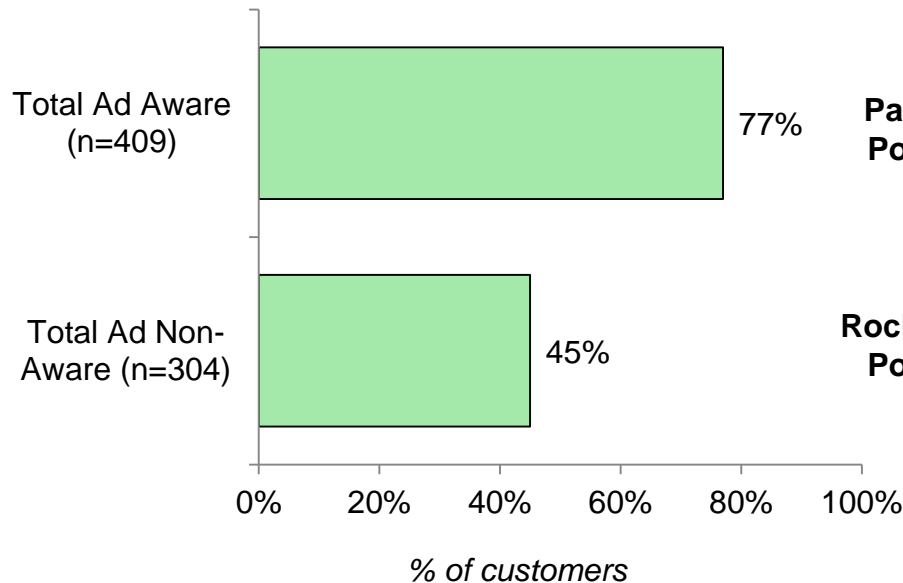
 = significantly higher than other utility

QN15A Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

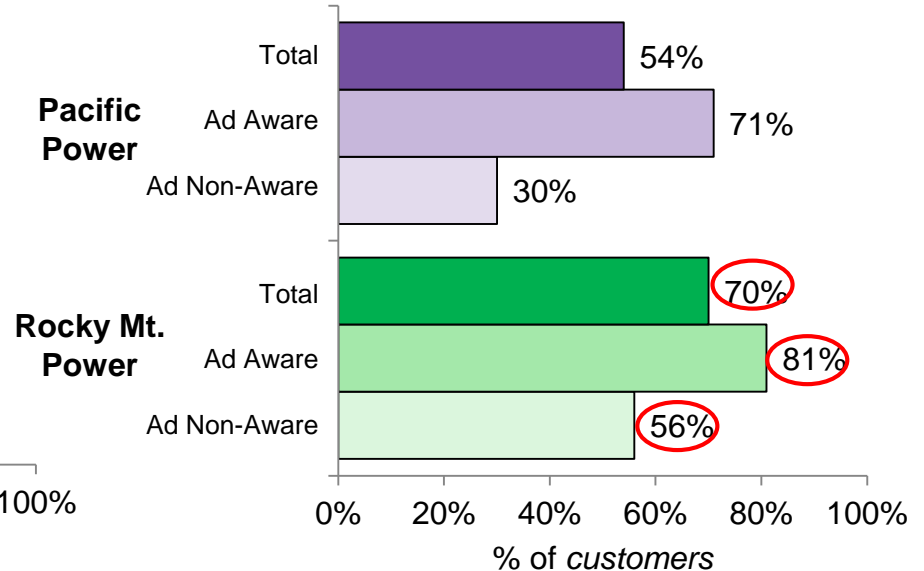
“Being Wattsmart” 2015

- Three in four (77%) Ad Aware customers recall the phrase “Being Wattsmart.”
- Rocky Mountain Power customers are significantly more likely to recall “Being Wattsmart” than Pacific Power customers.

Recall of
“Being Wattsmart”



Recall of
“Being Wattsmart”



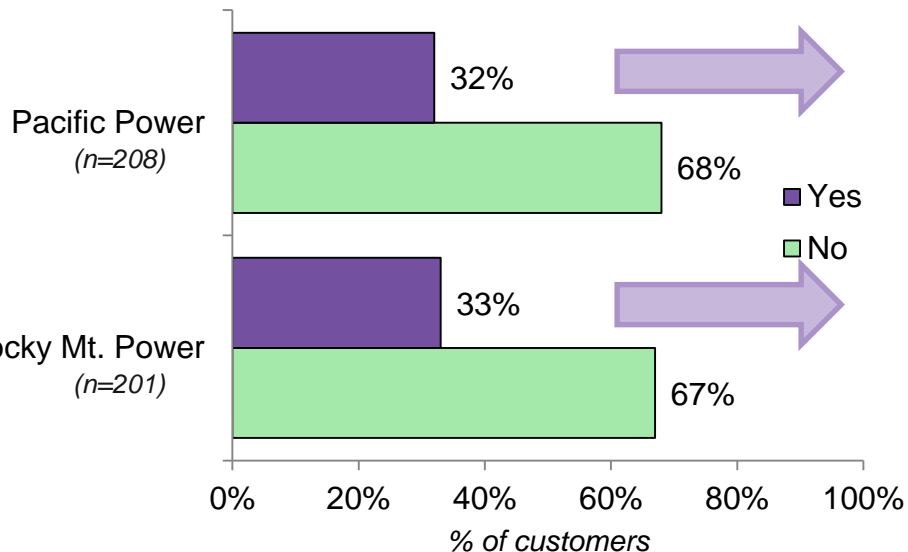
 = significantly higher than other utility

QN15B Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

Actions Taken Based on Advertisements 2015

- Overall, one third (33%) of Ad Aware customers report taking some action based on the advertisements or communications.
- Among customers persuaded to take action, “purchased/switched to energy efficient appliances/lights,” and “shutting off lights/appliances when not in use” were the top two actions taken.

2015 Took Action Based on Advertising



Actions taken from seeing the ads or communications	Pacific Power (n=66)	Rocky Mt. Power (n=67)
Shutting off lights/appliances when not in use	20%	18%
Purchased/switched to energy efficient appliances/lights	18%	45%
Invested in the Blue Sky program*	14%	4%
Enlisting in utility incentive/rebate programs	13%	8%
More aware of power usage	11%	11%
Invested in equal bill pay	9%	4%
Be prepared for power outages	8%	4%
Changing daily use of appliances	5%	4%
Become more energy efficient	5%	6%
Wattsmart	5%	7%
Invested in the wind power program	2%	1%

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? *added 2015
 2015 Customer Awareness Campaign Research

 = significantly higher than other utility



Impact of Advertisements and Communications on Customer Satisfaction & Company Image

Advertisements' Impact on Company Satisfaction – Ad Aware

- Three quarters (75%) of Pacific Power customers and over three quarters (78%) of Rocky Mountain Power Ad Aware customers are “very satisfied” with their utility company.
- The percentage of Pacific Power Ad Aware customers “very satisfied” with the company increased significantly from 2014.

Ad Aware: Advertisements' Impact on Company Satisfaction	2010		2011		2012		2013		2014		2015	
	Pacific Power (n=200)	Rocky Mt. Power (n=218)	Pacific Power (n=300)	Rocky Mt. Power (n=300)	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=200)	Rocky Mt. Power (n=200)	Pacific Power (n=208)	Rocky Mt. Power (n=201)
Very satisfied (8-10 ratings)	75%	72%	66%	76%	68%	78%	70%	74%	66%	75%	75%	78%
Moderately satisfied (5-7 ratings)	19%	22%	28%	21%	26%	20%	23%	22%	27%	20%	22%	18%
Not satisfied (0-4 ratings)	4%	6%	5%	3%	5%	2%	7%	4%	7%	5%	3%	3%

BLUE = significantly higher than 2014
 RED = significantly lower than 2014

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

- Three quarters of Rocky Mountain Power (75%) and Pacific Power (70%) Ad Non-Aware customers are “very satisfied” with their utility company.

Ad Non-Aware: Advertisements' Impact on Company Satisfaction	2010		2011		2012		2013		2014		2015	
	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power
	(n=150)	(n=150)	(n=200)	(n=200)	(n=150)	(n=150)	(n=150)	(n=150)	(n=150)	(n=150)	(n=153)	(n=151)
Very satisfied (8-10 ratings)	63%	64%	68%	76%	56%	69%	69%	60%	63%	65%	70%	75%
Moderately satisfied (5-7 ratings)	27%	28%	21%	15%	27%	27%	26%	32%	29%	31%	22%	21%
Not satisfied (0-4 ratings)	11%	6%	9%	8%	13%	4%	3%	5%	5%	4%	7%	3%

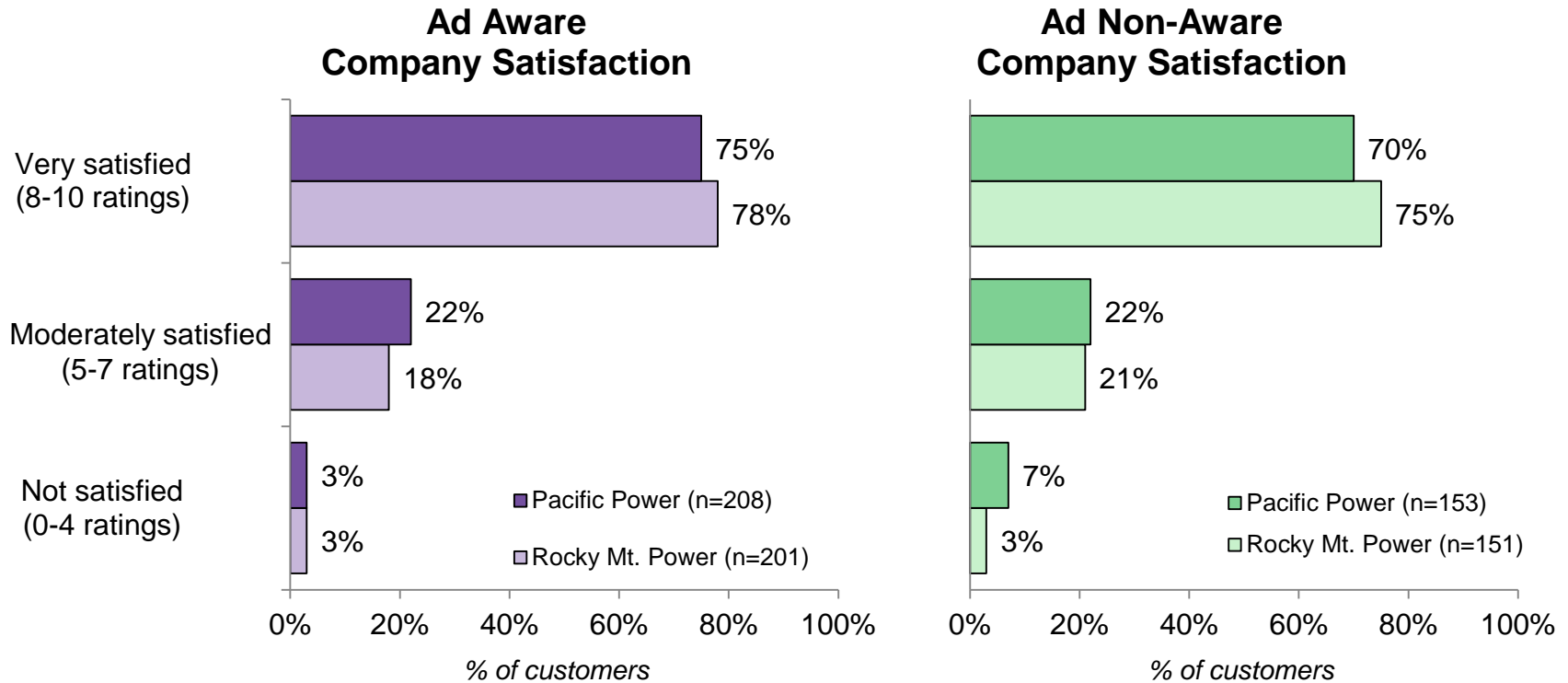
BLUE = significantly higher than 2014

RED = significantly lower than 2014

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 – 2015

- Three quarters of customers overall are “very satisfied” with their utility company.
- Satisfaction among Ad Aware and Ad Non-Aware customers is statistically equivalent.

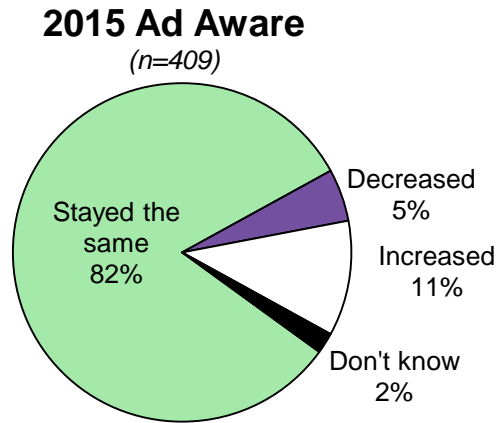


Q16 Now I'm going to ask some questions about your satisfaction with UTILITY. First, using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with UTILITY?

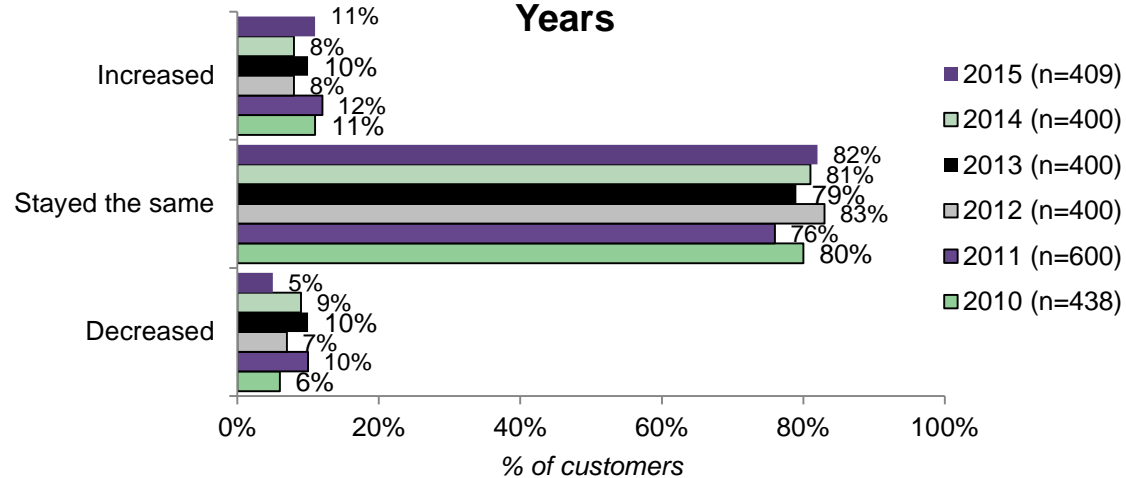
 = significantly higher than Ad Non-Aware customers
 = significantly higher than Ad Aware customers

Satisfaction Comparison With Previous Years Ad Aware

- Eight in ten (82%) Ad Aware customers state that their satisfaction with their utility company has remained unchanged since the previous year.



Satisfaction With Utility Compared to Previous Years



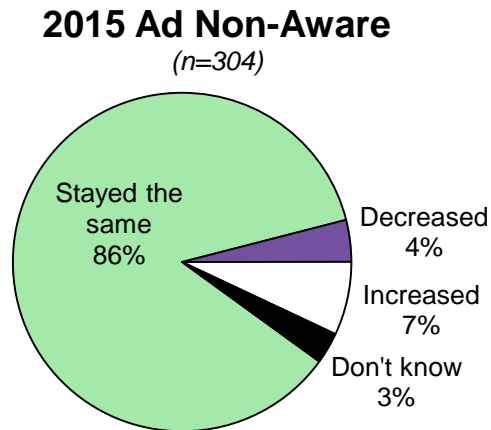
Why has your satisfaction increased?	2015
	(n=45)
Good reliable service	20%
Keeping people informed	15%
Works with the customer	15%
Quality of customer service	13%
Quick at restoring power	11%
Lower rates/affordable price	7%
Other	13%

Why has your satisfaction decreased?	2015
	(n=22)*
Increased cost/rates	60%
Quality of customer service	5%
Difficult to work with	5%
Many service interruptions	4%
Other	36%

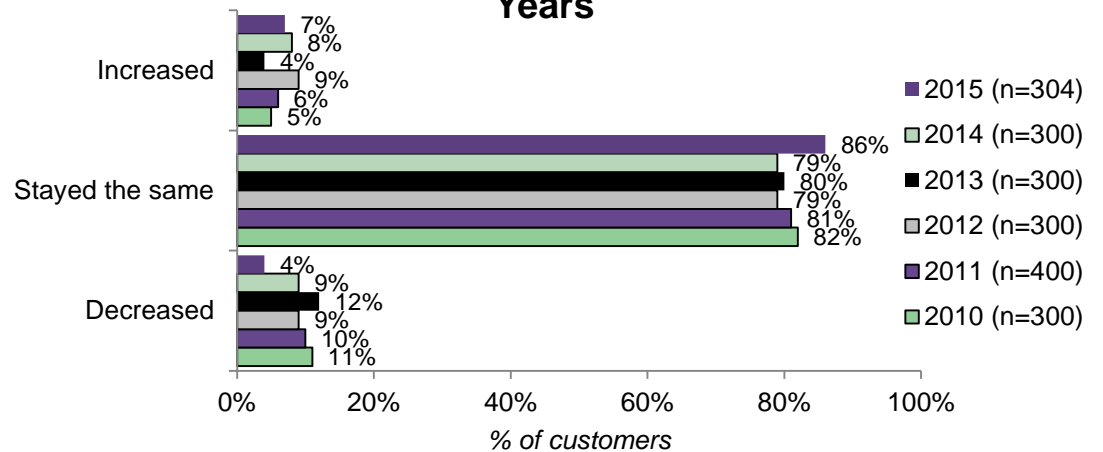
Satisfaction Comparison With Previous Years

Ad Non-Aware

- Over eight in ten Ad Non-Aware customers state their satisfaction with their utility company remains unchanged from one year ago.



Satisfaction With Utility Compared to Previous Years

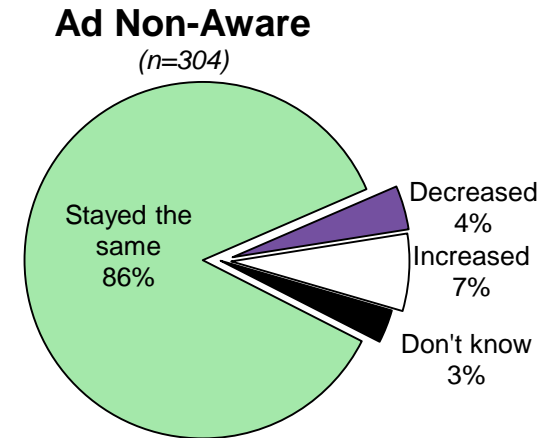
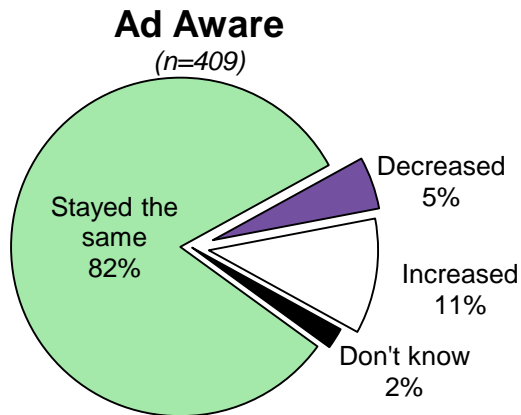


Why has your satisfaction increased?	2015 (n=22)*
Good reliable service	27%
Quality of customer service	13%
Quick at restoring power	11%
Billing services assistance	5%
Lower rates/affordable price	4%
Other	13%

Why has your satisfaction decreased?	2015 (n=13)*
Increased cost/rates	64%
Many service interruptions	19%
Poor service (general)	9%
Difficult to work with	9%
Quality of customer service	6%
Lack of communication w/customers	6%
Other	0%

Satisfaction Comparison Between Ad Aware and Ad Non-Aware 2015

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



Why has your satisfaction increased?	Ad Aware (n=45)	Ad Non-Aware (n=22)*
Good reliable service	20%	27%
Quality of customer service	13%	13%
Works with the customer	15%	8%
Lower rates/affordable price	7%	4%
Keeping people informed	15%	--
Quick at restoring power	11%	11%

Why has your satisfaction decreased?	Ad Aware (n=22)*	Ad Non-Aware (n=13)*
Increased cost/rates	60%	64%
Quality of customer service	5%	6%
Poor service (general)	--	9%
Lack of communication w/customers	--	6%
Difficult to work with	5%	9%
Many service interruptions	4%	19%

*CAUTION: small sample sizes.

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

15% = significantly higher than Ad Non-Aware customers
9% = significantly higher than Ad Aware customers

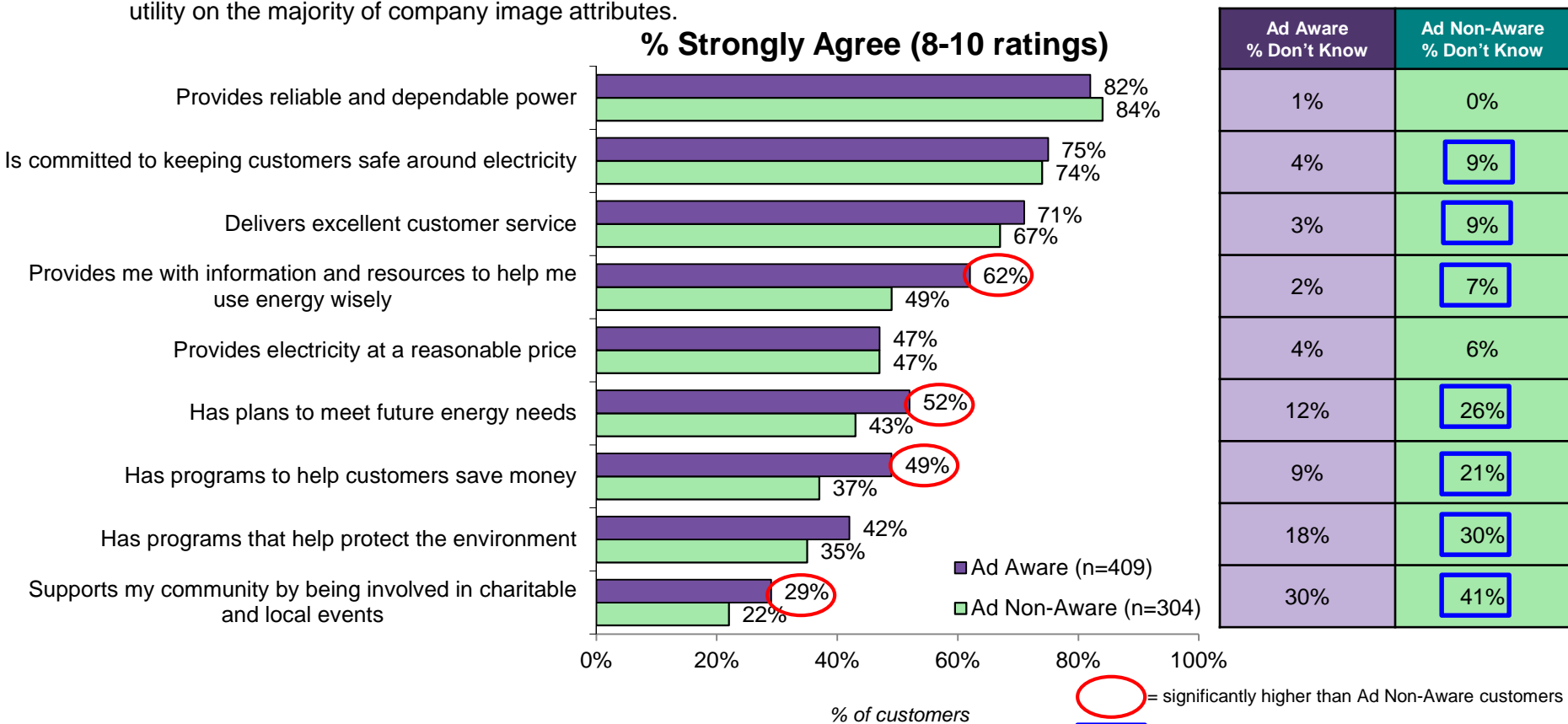


Company Image Evaluation

- Overall, customers' perceptions of their utility company have remained largely consistent.
 - In 2015, Ad Non-Aware customers are significantly more likely to “strongly agree” their utility provides reliable and dependable power (84% vs. 77% in 2014), is committed to keeping customers safe around electricity (74% vs. 66% in 2014), delivers excellent customer service (67% vs. 56% in 2014) and has plans to meet future energy needs (43% vs. 35% in 2014).
- Customers continue to have the most positive perceptions of their utility when it comes to attributes they are most likely to have **personally experienced**, including:
 - Provides reliable and dependable power
 - Is committed to keeping customers safe around electricity
 - Delivers excellent customer service
- Similarly, customers are least likely to agree with, and most likely to give “don't know” responses to the statements to which they are **unlikely to have direct experience**. These statements include:
 - Supports my community by being involved in charitable and local events
 - Has programs that help protect the environment
 - Has programs to help customers save money
 - Has plans to meet future energy needs
- 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 2015

- Ad Aware customers are significantly more likely than Ad Non-Aware customers to “strongly agree” their utility provides information and resources to help use energy wisely, has plans to meet future energy needs, has programs that help customers save money, and supports the community.
- Ad Non-Aware customers are significantly more likely than Ad Aware customers to say they “don’t know” how to evaluate their utility on the majority of company image attributes.



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

Company Image Evaluation 2009-2015

- In 2015, Ad Non-Aware customers are significantly more likely, compared to 2014, to “strongly agree” that their utility provides reliable and dependable power, is committed to keeping customers safe around electricity, delivers excellent customer service and has plans to meet future energy needs.

Company Image Attributes (% “strongly agree” 8-10 ratings)	2010		2011		2012		2013		2014		2015	
	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware	Ad Aware	Ad Non-Aware
	(n=438)	(n=300)	(n=600)	(n=400)	(n=400)	(n=300)	(n=400)	(n=300)	(n=400)	(n=300)	(n=409)	(n=304)
Provides reliable and dependable power	81%	72%	77%	80%	79%	77%	82%	81%	81%	77%	82%	84%
Is committed to keeping customers safe around electricity	74%	66%	76%	69%	70%	65%	71%	68%	72%	66%	75%	74%
Delivers excellent customer service	65%	58%	66%	66%	64%	61%	65%	66%	70%	56%	71%	67%
Provides me with information and resources to help me use energy wisely	57%	52%	56%	54%	54%	46%	54%	49%	56%	44%	62%	49%
Has plans to meet future energy needs	51%	42%	47%	38%	43%	37%	47%	36%	48%	35%	52%	43%
Provides electricity at a reasonable cost	48%	40%	41%	41%	40%	41%	49%	42%	49%	42%	47%	47%
Has programs to help customers save money	47%	35%	49%	44%	45%	40%	44%	37%	48%	43%	49%	37%
Has programs that help protect the environment	41%	34%	42%	34%	41%	34%	41%	30%	43%	35%	42%	35%
Supports my community by being involved in charitable and local events	27%	19%	25%	21%	21%	22%	26%	22%	30%	21%	29%	22%

BLUE = significantly higher than 2014
RED = significantly lower than 2014

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 2015

(by Utility & Ad Awareness)

- Pacific Power Ad Aware customers are significantly more likely than Ad Non-Aware customers to “strongly agree” with many of the company attributes tested.

Company Image Attributes (% “strongly agree” 8-10 ratings)	Ad Aware		Ad Non-Aware	
	Pacific Power (n=208)	Rocky Mt. Power (n=201)	Pacific Power (n=153)	Rocky Mt. Power (n=151)
Provides reliable and dependable power	83%	82%	84%	84%
Is committed to keeping customers safe around electricity	76%	75%	72%	75%
Delivers excellent customer service	77%	66%	63%	70%
Provides me with information and resources to help me use energy wisely	68%	58%	50%	48%
Has plans to meet future energy needs	55%	49%	45%	42%
Provides electricity at a reasonable price	50%	45%	41%	51%
Has programs to help customers save money	56%	44%	37%	38%
Has programs that help protect the environment	52%	35%	34%	36%
Supports my community by being involved in charitable and local events	31%	27%	22%	22%

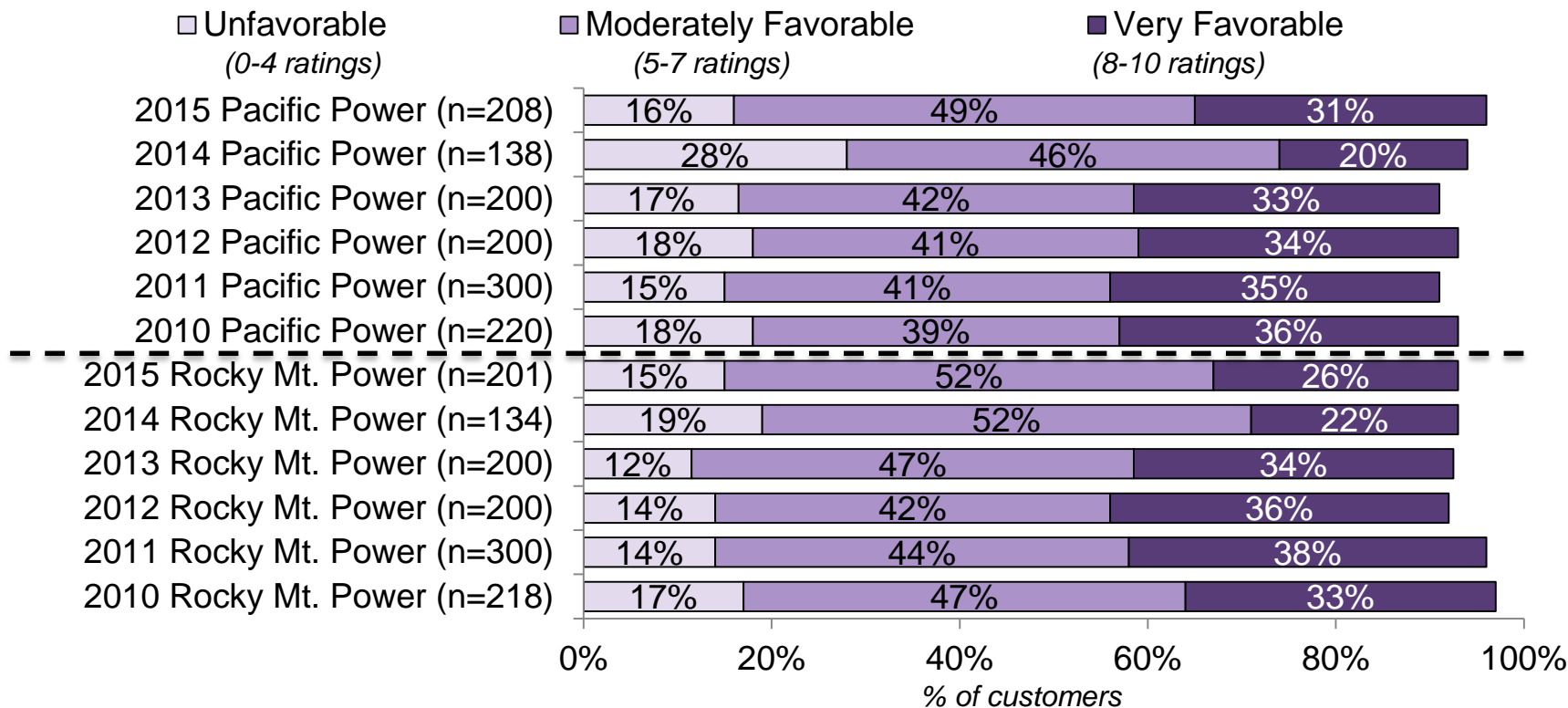
Q19 Based on your overall perceptions and experiences with UTILITY, please rate each of the following statements on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree.

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

Advertisements' Impact on Company Image 2010-2015

- One third (28%) of Ad Aware customers say that the ads have “very favorably” affected their opinion of their electric utility, while the percentage who rate the impact as “unfavorable” (16%) decreased significantly from 2014.

Advertisements' Impact on Favorability Ratings



Q14 Using a 0-10 scale, where 0 means much less favorable, and 10 is much more favorable, how have the advertisements or communications you have seen, heard or read from UTILITY affected your opinion of the company? You can use any number from 0-10.

Rationales for Company Favorability Ratings 2015

Very Favorable (8-10 rating) (n=115)	Moderately Favorable (5-7 rating) (n=207)	Least Favorable (0-4 rating) (n=64)
34% Good company/positive opinion	15% Rarely see advertisements/do not affect me/not useful/not necessary	21% Rarely see advertisements/do not affect me/not useful/not necessary
13% Informative (general)	12% Neutral feeling towards them	17% Limited choice in utility provider/monopoly
11% Advertisements serve as education to consumers	10% Limited choice in utility provider/monopoly	10% Not convinced of the information given
5% Efforts towards renewable/alternative energy	9% Good company/positive opinion	9% Haven't paid attention
4% Negative opinion/bad company	7% Haven't paid attention	5% Increased cost/rates
4% Information is useful to energy habits/usage	4% Negative opinion/bad company	5% No communication besides my bill
4% Offer incentives/financial programs	3% Not convinced of the information given	4% Negative opinion/bad company
4% Rarely see advertisements/do not affect me/not useful/not necessary	3% Increased cost/rates	3% Neutral feeling towards them
3% Commercials are good	3% My opinion hasn't changed	3% Efforts towards renewable/alternative energy

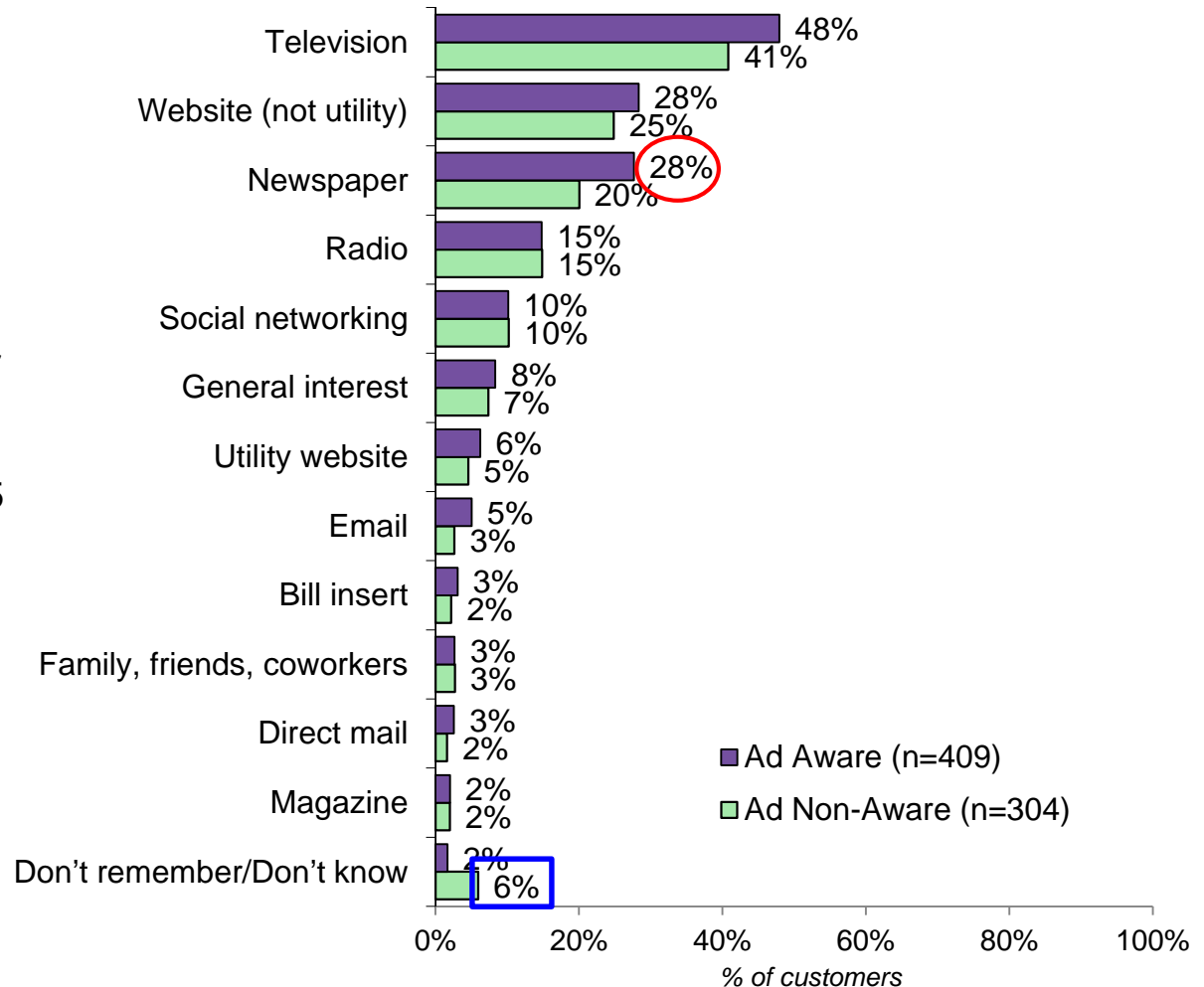


Communication Sources

News & Current Event Sources 2015

- Television, non-utility websites, and newspapers are the primary sources for news and current events.
- Ad Aware customers are significantly more likely to read a newspaper for information about news and current events.
- Customers age 54 and younger are more likely to rely on non-utility websites (36% vs. 18% for 55+), whereas customers 55 and older are more likely to rely on television and newspapers for news and current events.

News & Current Event Channels



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

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

News & Current Event Sources 2010-2015

- Television is still the primary source for news despite a significant decrease in usage from 2014 to 2015.
 - Both Ad Aware and Ad Non-Aware customers also report significantly less usage of newspaper than in 2014.
 - Ad aware customers are more likely to report using social networking than in 2014.

News & Current Event Sources	2010		2011		2012		2013		2014		2015	
	Ad Aware (n=438)	Ad Non-Aware (n=300)	Ad Aware (n=600)	Ad Non-Aware (n=400)	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=409)	Ad Non-Aware (n=304)
Television	64%	62%	67%	57%	58%	61%	56%	52%	58%	49%	48%	41%
Website (not utility)	30%	27%	32%	33%	31%	26%	34%	37%	30%	26%	28%	25%
Newspaper	48%	38%	43%	30%	41%	36%	38%	27%	37%	28%	28%	20%
Radio	21%	15%	18%	13%	21%	17%	26%	20%	18%	13%	15%	15%
Social networking	4%	2%	4%	3%	4%	6%	5%	1%	5%	6%	10%	10%
General internet	3%	4%	7%	6%	7%	5%	8%	6%	9%	6%	8%	7%
Utility website	3%	2%	2%	2%	3%	2%	3%	0%	6%	4%	6%	5%
Bill insert	2%	1%	2%	3%	3%	4%	1%	1%	1%	2%	3%	2%
Family, friends, coworkers	3%	4%	1%	1%	3%	1%	2%	2%	4%	4%	3%	3%
Direct mail	3%	3%	<1%	1%	2%	2%	2%	2%	4%	2%	3%	2%
Magazine	2%	2%	3%	1%	3%	3%	4%	1%	2%	1%	2%	2%
Don't remember/Don't know	1%	6%	1%	5%	2%	2%	0%	1%	1%	5%	2%	6%

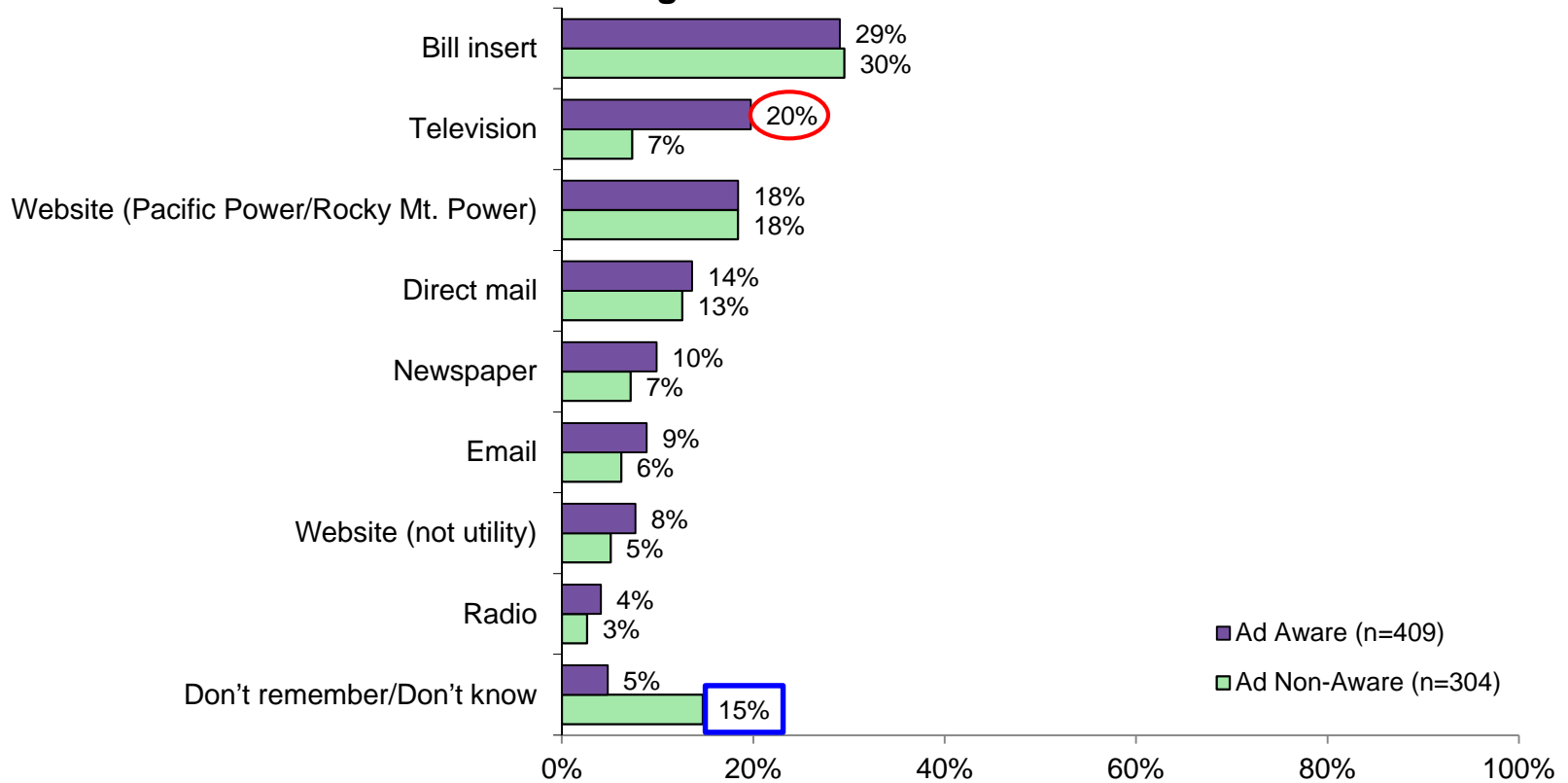
Q20 What sources do you typically rely on for information about news and current events?

BLUE = significantly higher than 2014
RED = significantly lower than 2014

Utility Information Sources 2015

- Bill inserts remain the primary source for utility information.
- Ad Aware customers are more likely to utilize television for information about their utility.

Advertising & Communication Channels



*Information sources are listed in decreasing order by total.

% of customers

 = significantly higher than Ad Non-Aware customers

 = significantly higher than Ad Aware customers

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

Utility Information Sources 2010-2015

- Top sources of utility information remain relatively consistent with the previous year, with bill inserts, utility websites, television, and direct mail being the primary sources.
 - Both Ad Aware and Ad Non-Aware customers are more likely to mention email as a source for information on their utility in 2015.

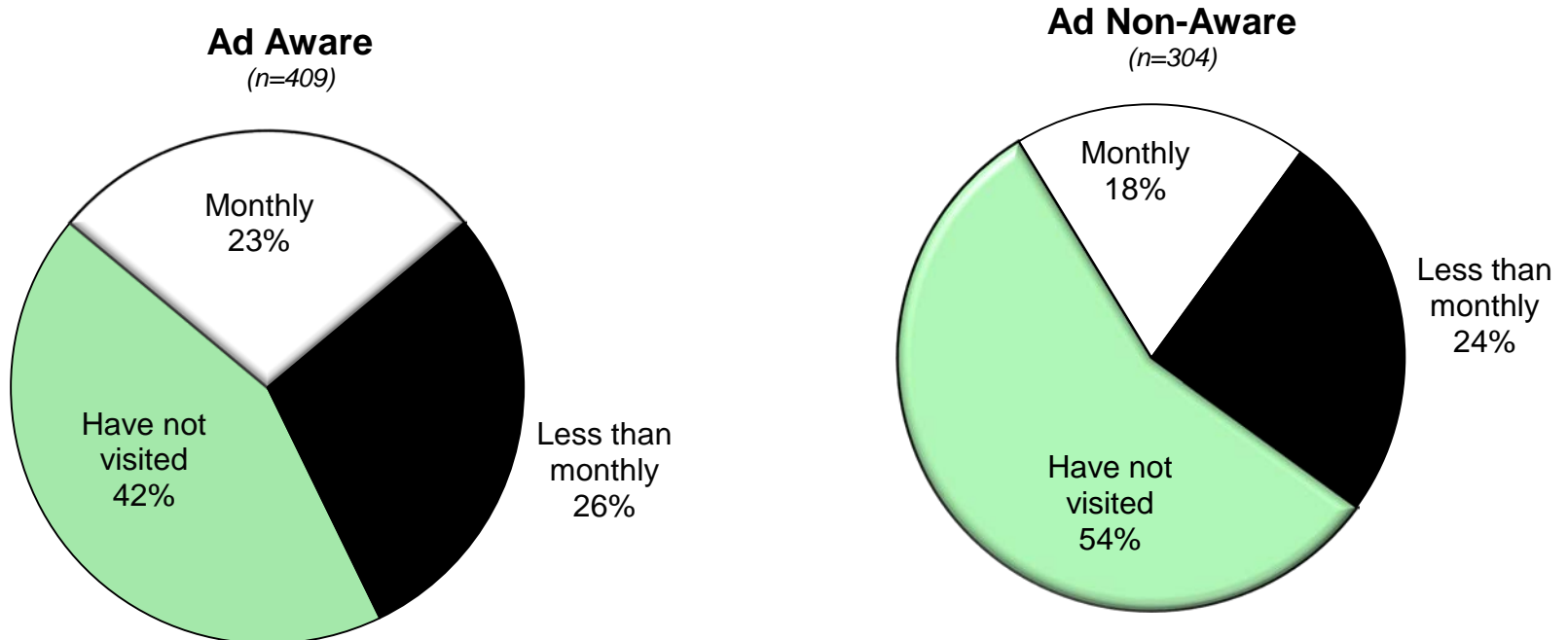
Utility Information Sources	2010		2011		2012		2013		2014		2015	
	Ad Aware (n=438)	Ad Non-Aware (n=300)	Ad Aware (n=600)	Ad Non-Aware (n=400)	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=400)	Ad Non-Aware (n=300)	Ad Aware (n=409)	Ad Non-Aware (n=304)
Bill insert	38%	40%	41%	34%	38%	35%	31%	31%	29%	29%	29%	30%
Website (Pacific Power/Rocky Mt. Power)	12%	6%	20%	18%	18%	13%	20%	13%	17%	16%	18%	18%
Television	27%	13%	30%	11%	19%	14%	15%	9%	18%	13%	20%	7%
Direct mail	15%	12%	11%	12%	17%	11%	20%	18%	14%	11%	14%	13%
Newspaper	18%	10%	14%	9%	8%	9%	12%	6%	15%	9%	10%	7%
Email	1%	--	<1%	<1%	2%	1%	3%	1%	4%	1%	9%	6%
Website (not utility)	6%	4%	6%	4%	6%	8%	7%	7%	7%	6%	8%	5%
Radio	5%	3%	7%	2%	7%	3%	5%	2%	4%	1%	4%	3%
Don't remember/Don't know	9%	22%	8%	20%	7%	11%	6%	18%	7%	17%	5%	15%

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

BLUE = significantly higher than 2013
RED = significantly lower than 2013

Visiting Electric Utility Website

- Almost half (49%) of Ad Aware, and four in ten (42%) of Ad Non-Aware customers have visited their electric utility's website, consistent with 2014 figures.
- Of those who have visited their utility's website, half visit *less than monthly*.



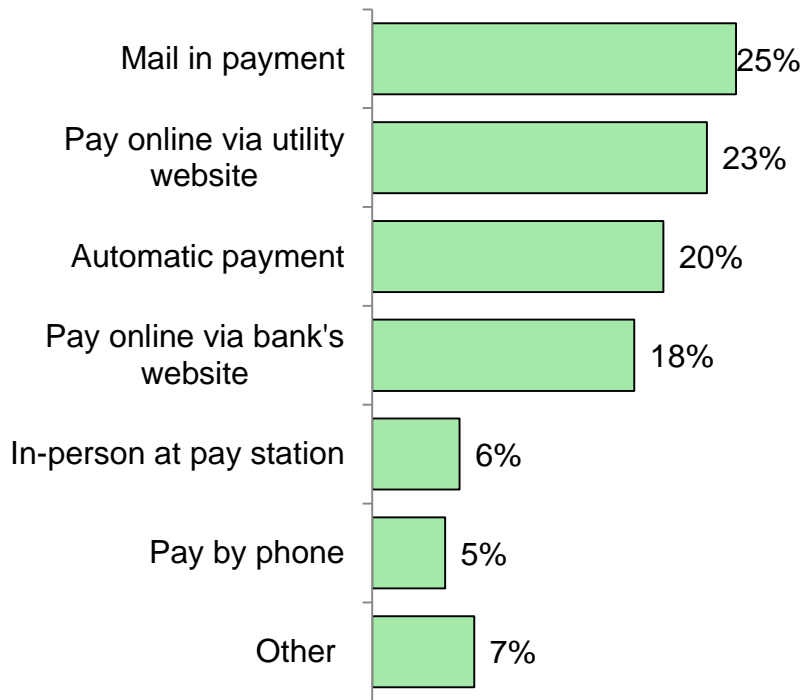
○ = significantly higher than Ad Non-Aware customers
 □ = significantly higher than Ad Aware customers

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

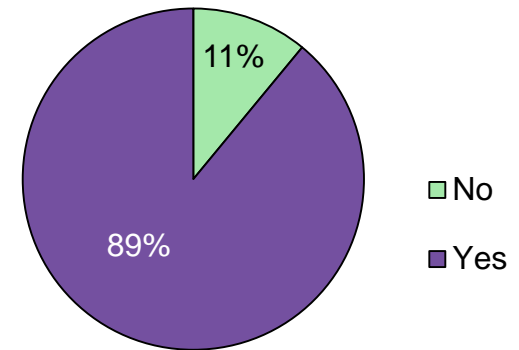
Use of Reusable Payment Envelope

- Nine in ten (89%) customers who mail in their bill payment report having used the reusable envelope.

Bill Payment Method
(n=713)



Have Used Reusable Envelope
(n=179)



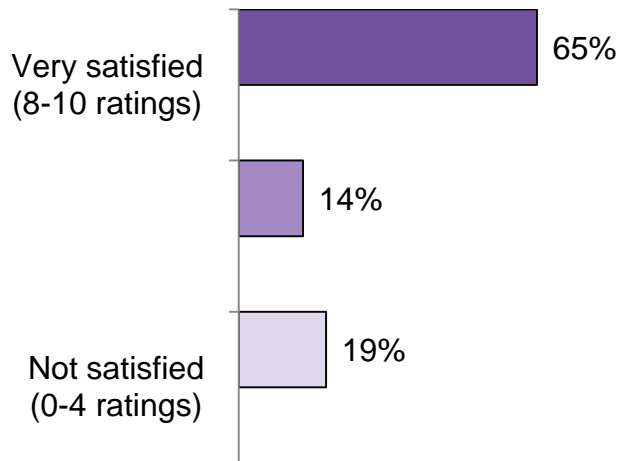
P1. How do you typically pay your Pacific Power/Rocky Mountain Power bill?
P2. Have you used the reusable envelope to mail in your payment?

Reusable Envelope Benefits and Satisfaction

- Of the customers who have used the reusable envelope, two thirds (65%) are “very satisfied.”
- Three quarters (75%) of respondents agree that they “clearly understand the benefits” of the envelope, which over half (57%) described as “reducing paper waste.”

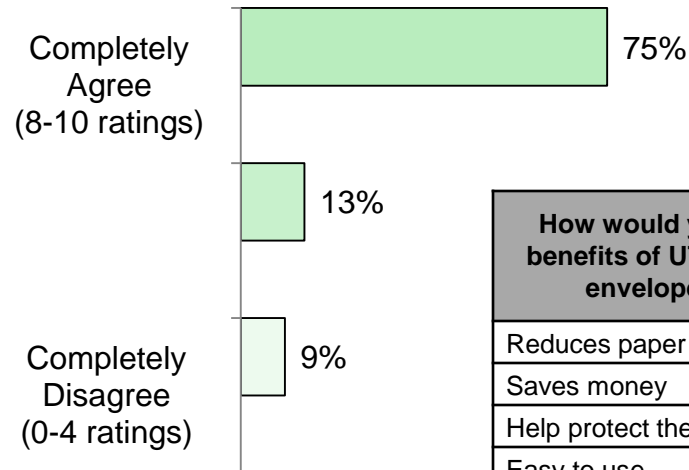
Reusable Envelope Satisfaction

(n=159)



Understand Benefits

(n=159)



How would you describe the benefits of UTILITY'S reusable envelope? (unaided)	2015
	(n=159)
Reduces paper waste	57%
Saves money	27%
Help protect the environment	19%
Easy to use	17%
Keeps electricity prices low	8%
Other (<6% mentions)	25%

P3. Using a 0-10 scale, where 0 means not at all satisfied, and 10 is completely satisfied, how satisfied are you overall with Pacific Power/Rocky Mountain Power's reusable envelope?

P4. Please rate the following statement on a scale of 0-10, where 0 means you completely disagree with the statement, and 10 means you completely agree. "I clearly understand the benefits of the reusable envelope."

P5. How would you describe the benefits of UTILITY'S reusable envelope?



Energy Efficiency Programs

Awareness of Energy Efficiency Programs 2013-2015

- Consistent with 2014, one third (35%) of respondents are aware of energy efficiency programs offered by Pacific Power and Rocky Mountain Power.

EE Awareness	Oregon			Washington			California			Utah			Wyoming			Idaho		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
	(n=266)	(n=266)	(n=269)	(n=62)	(n=62)	(n=209)	(n=22)*	(n=22)*	(n=24)*	(n=277)	(n=277)	(n=279)	(n=200)	(n=200)	(n=201)	(n=26)*	(n=26)*	(n=204)
Yes	33%	35%	35%	44%	35%	39%	32%	45%	33%	40%	40%	36%	28%	21%	27%	35%	42%	41%
No	56%	62%	62%	48%	61%	59%	64%	55%	67%	54%	56%	61%	68%	77%	69%	62%	58%	56%
Don't remember/ Don't know	11%	3%	3%	11%	3%	2%	5%	0%	0%	5%	4%	3%	4%	2%	4%	4%	0%	3%

*CAUTION: small sample sizes.

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

BLUE = significantly higher than 2014
RED = significantly lower than 2014

Total EE Program Recall 2013-2015

- Customers' awareness of a select group of programs was also measured. The following combines both unaided and aided awareness of each program.
 - Only residents of Utah were asked about "Energy Star New Homes," "Cool Cash Incentive" and "Cool Keeper."

Program Recall	Oregon			Washington			California			Utah			Wyoming			Idaho		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
	(n=266)	(n=266)	(n=269)	(n=62)	(n=62)	(n=209)	(n=22)*	(n=22)*	(n=24)*	(n=277)	(n=277)	(n=279)	(n=200)	(n=200)	(n=201)	(n=26)*	(n=26)*	(n=204)
Cool Keeper	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	41%	32%	44%	n/a	n/a	n/a	n/a	n/a	n/a
See Ya Later, Refrigerator	41%	32%	30%	66%	58%	72%	55%	50%	29%	68%	76%	67%	46%	45%	46%	50%	65%	50%
Home Energy Savings	46%	40%	53%	54%	48%	59%	45%	73%	50%	61%	76%	60%	50%	61%	58%	50%	69%	58%
Wattsmart	45%	41%	50%	64%	58%	74%	41%	32%	50%	58%	71%	63%	41%	57%	53%	34%	58%	58%
Energy Star New Homes	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	44%	31%	40%	n/a	n/a	n/a	n/a	n/a	n/a
Rebates and cashback*	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	n/a	38%	39%	58%	n/a	n/a	n/a	n/a	n/a	n/a
Low Income Weatherization	45%	34%	49%	39%	31%	45%	50%	46%	42%	26%	35%	27%	25%	34%	30%	35%	46%	35%
Home Energy Reports	n/a	22%	32%	n/a	36%	60%	n/a	n/a	n/a	n/a	31%	49%	n/a	n/a	34%	n/a	n/a	43%

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

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

Note: Cool Cash Incentive, Cool Keeper, Energy Star New Homes, and Home Energy Reports show data for total answering; sample size may vary.

Energy Trust of Oregon Awareness 2012-2015

- Consistent with 2014, half of all respondents from Oregon have heard of the Energy Trust of Oregon.
 - Of these respondents, over half (52%) are aware that Pacific Power and the Energy Trust of Oregon work together as partners on energy efficiency programs for Oregon utility customers.

Have you ever heard of the Energy Trust of Oregon?

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

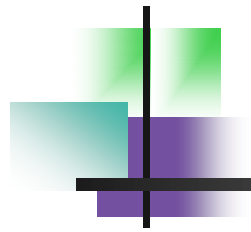
	Oregon			
	2012 (n=266)	2013 (n=266)	2014 (n=156)	2015 (n=225)
Yes	54%	62%	53%	55%
No	43%	37%	43%	43%
Don't remember/Don't know	3%	2%	4%	1%



	Oregon			
	2012 (n=143)	2013 (n=164)	2014 (n=83)	2015 (n=124)
Yes	48%	43%	61%	52%
No	50%	51%	37%	44%
Don't remember/Don't know	3%	6%	2%	4%

OR1 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?



Key Findings



Key Findings

- Overall company awareness of Pacific Power and Rocky Mountain Power remains high, and is consistent with 2014 figures.
- Reported advertising/communication awareness is statistically consistent with last year for both Pacific Power and Rocky Mountain Power.
 - Pacific Power % Aware: 57% 2010, 50% 2011, 58% 2012, 58% 2013, 52% 2014 and 59% 2015
 - Rocky Mountain Power % Aware: 66% 2010, 58% 2011, 57% 2012, 61% 2013, 65% 2014 and 68% 2015.
- For the first time, the number of ad exposures recalled is consistent among Rocky Mountain Power Ad Aware customers (8.2) and Pacific Power Ad Aware customers (7.2).
- The advertisements/communications from Pacific Power/Rocky Mountain Power have moderately favorable influence.
 - Over one quarter (28%) of Ad Aware customers say that the ads have “very favorably” affected their opinion of their electric utility.
 - The rate of impact as “unfavorable” decreased significantly from 2014 (23% vs. 16%).
 - Overall satisfaction is slightly higher among Ad Aware customers (Ad Aware: 75% PP/78% RMP; Ad Non-Aware: 70% PP/75% RMP).
- The most frequently recalled messages remain using energy wisely, and energy efficiency programs.
 - Pacific Power customers are significantly more likely to recall messages with content about “renewable or alternative energy,” “billing and energy assistance,” and “Blue Sky Renewable Energy.”
 - Rocky Mountain Power customers are significantly more likely to recall messages with content about “being Wattsmart” and “electrical safety.”



Key Findings

- Recall of “Let’s Turn the Answers On” continues to be significantly higher among Ad Aware customers, and slightly higher among Rocky Mountain Power customers.
 - “Let’s Turn the Answers On” – Ad Aware 28% vs. Ad Non-Aware 13%; Rocky Mountain Power 24% vs. Pacific Power 18%.
- Recall of “Being Wattsmart” remains higher among Ad Aware customers and Rocky Mountain Power customers.
 - “Being Wattsmart” – Ad Aware 77% vs. Ad Non-Aware 45%; Rocky Mountain Power 70% vs. Pacific Power 54%.
- Three in ten (33%) customers report having taken action based on the advertisement or communication seen from the company. The response is consistent between utility companies.
 - Pacific Power: 32%; Rocky Mountain Power: 33%
 - The most frequently mentioned actions taken remain: purchased/switched to energy efficient appliances/lights, turning off lights/appliances when not in use, and invested in the Blue Sky program.
- Bill inserts, utility websites and television are the primary sources for utility information.
- One third (36%) of customers are aware that Pacific Power/Rocky Mountain Power offer energy efficiency programs.
- Among those mailing in their payment, nine in ten (89%) have used the reusable envelope.
 - Of those using the reusable envelope, 65% are “very satisfied” (8-10 ratings), and 75% “clearly understand the benefits” (8-10 ratings).
 - Over half (57%) describe the primary benefit as “reducing paper waste/saving paper.” One quarter (27%) mention “save money” as the primary benefit.

2010-2015: Ad Aware Customers

Ad Aware Customers Differences 2010-2015	2010	2011	2012	2013	2014	2015
% very satisfied overall with company	73%	72%	74%	72%	71%	75%
Company awareness (unaided): Pacific Power	87%	96%	89%	89%	91%	91%
Company awareness (unaided): Rocky Mountain Power	87%	91%	92%	84%	94%	91%
Top of Mind: Pacific Power	77%	90%	81%	76%	81%	83%
Top of Mind: Rocky Mountain Power	70%	73%	73%	65%	77%	78%
% who are very favorable toward <i>UTILITY</i> as a result of ad/communications	34%	36%	35%	33%	15%	28%
% who see, hear or read <i>UTILITY</i> advertisements via TV	61%	60%	47%	56%	37%	37%
% who see, hear or read <i>UTILITY</i> advertisements via bill inserts	19%	25%	31%	31%	31%	31%
% who see, hear or read <i>UTILITY</i> advertisements via direct mail	10%	11%	17%	20%	15%	20%
% who recall message of renewable or alternative energy (unaided)	13%	16%	8%	9%	10%	6%
% who recall "Let's Turn the Answers On"	33%	44%	35%	32%	28%	28%
% who recall "Being Wattsmart"	n/a	65%	66%	70%	67%	77%
% who took action based on advertisement	26%	31%	30%	32%	32%	33%

BLUE = significantly higher than 2014

RED = significantly lower than 2014

2010-2015 : Ad Non-Aware Customers

Ad Non-Aware Customers Differences 2010-2015	2010	2011	2012	2013	2014	2015
Company awareness (aided + unaided): Pacific Power	66%	88%	84%	86%	81%	85%
Company awareness (aided + unaided): Rocky Mountain Power	62%	90%	83%	80%	85%	83%
Unaided company awareness: Pacific Power	55%	79%	73%	73%	73%	71%
Unaided company awareness: Rocky Mountain Power	44%	77%	66%	62%	74%	68%
% who rely on TV for news and current events	62%	57%	61%	52%	49%	41%

BLUE = significantly higher than 2014

RED = significantly lower than 2014



Ad Aware vs. Ad Non-Aware Customers

2015 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% very satisfied overall with company	76%	73%
% recall "Let's Turn the Answers On"	28%	13%
% recall "Being Wattsmart"	77%	45%
% who say that their satisfaction with the <i>UTILITY</i> has increased over the past year	11%	7%
% strongly agree that <i>UTILITY</i> delivers excellent customer service	71%	67%
% who strongly agree <i>UTILITY</i> is committed to keeping customers safe around electricity	75%	74%
% who strongly agree <i>UTILITY</i> has plans to meet future energy needs	52%	43%
% who strongly agree <i>UTILITY</i> has programs that help protect the environment	42%	35%
% aware of any energy efficiency programs currently offered by <i>UTILITY</i>	37%	34%

RED = significant difference



Ad Aware vs. Ad Non-Aware Customers

2015 Differences between Ad Aware & Ad Non-Aware Customers	Ad Aware	Ad Non-Aware
% who typically rely on television as a source for information about news and current events	48%	41%
% who typically rely on newspaper as a source for information about news and current events	28%	20%
% who typically rely on radio as a source for information about news and current events	15%	15%
% who typically rely on bill inserts as a source for information about <i>UTILITY</i>	29%	30%
% who typically rely on television as a source for information about <i>UTILITY</i>	20%	7%
% who typically rely on newspaper as a source for information about <i>UTILITY</i>	10%	7%
% who have visited the <i>UTILITY</i> website	46%	31%

RED = significant difference





2015 Demographics

Demographics

Customer Tenure	Ad Aware		Ad Non-Aware	
	Pacific Power (n=208)	Rocky Mt. Power (n=201)	Pacific Power (n=153)	Rocky Mt. Power (n=151)
1-4 years	22%	22%	24%	27%
5-9 years	15%	16%	12%	14%
10-19 years	17%	18%	22%	12%
20-29 years	13%	15%	12%	17%
30-39 years	11%	11%	11%	10%
40-49 years	10%	7%	8%	8%
50+ years	13%	9%	11%	13%



Gender	Ad Aware		Ad Non-Aware	
	Pacific Power (n=293)	Rocky Mt. Power (n=396)	Pacific Power (n=197)	Rocky Mt. Power (n=183)
Male	50%	57%	53%	56%
Female	50%	43%	47%	44%

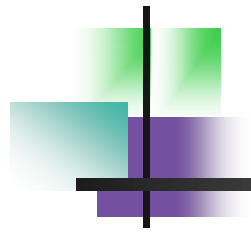
 = significantly higher than Ad Non-Aware/Ad Aware customers
 = significantly higher than other utility

Demographics

Age	Ad Aware		Ad Non-Aware	
	Pacific Power (n=208)	Rocky Mt. Power (n=201)	Pacific Power (n=153)	Rocky Mt. Power (n=151)
18-34	22%	26%	20%	25%
35-54	23%	34%	20%	28%
55+	53%	39%	54%	45%
Refused	2%	1%	6%	2%

Income	Ad Aware		Ad Non-Aware	
	Pacific Power (n=208)	Rocky Mt. Power (n=201)	Pacific Power (n=153)	Rocky Mt. Power (n=151)
Less than \$15,000	13%	6%	15%	9%
\$15-\$30,000	25%	13%	14%	19%
\$30-\$50,000	20%	21%	20%	18%
\$50-\$75,000	13%	24%	14%	18%
\$75-\$100,000	11%	12%	10%	11%
Over \$100,000	9%	11%	8%	11%
Don't know	1%	1%	3%	3%
Refused	8%	11%	15%	12%

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



Appendix: Tracking Slides

Top of Mind Unaided Company Awareness 2012-2015

- Top of mind awareness for both Pacific Power and Rocky Mountain Power remains high.
 - 2015 top of mind awareness of Pacific Power and Rocky Mountain Power is consistent with 2014 levels.

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

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

2014 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=264)	Rocky Mt. Power (n=340)	Pacific Power (n=232)	Rocky Mt. Power (n=178)
Pacific Power/PPL	81%	2%	73%	2%
Rocky Mountain Power/Utah Power	--	77%	--	74%

2015 Company Awareness <i>First Mention</i>	Ad Aware		Ad Non-Aware	
	Pacific Power (n=293)	Rocky Mt. Power (n=396)	Pacific Power (n=197)	Rocky Mt. Power (n=183)
Pacific Power/PPL	83%	2%	71%	1%
Rocky Mountain Power/Utah Power	--	78%	2%	68%

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

BLUE = significantly higher than 2014

RED = significantly lower than 2014

Total Unaided Company Awareness 2012 - 2015

- Total awareness across both utilities has remained consistent compared to 2014.

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

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

2014 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=264)</i>	Rocky Mt. Power <i>(n=340)</i>	Pacific Power <i>(n=232)</i>	Rocky Mt. Power <i>(n=178)</i>
Pacific Power/PPL	91%	2%	81%	2%
Rocky Mountain Power/Utah Power	1%	94%	0%	85%

2015 Company Awareness <i>(Top of mind + others = total awareness)</i>	Ad Aware		Ad Non-Aware	
	Pacific Power <i>(n=293)</i>	Rocky Mt. Power <i>(n=396)</i>	Pacific Power <i>(n=197)</i>	Rocky Mt. Power <i>(n=183)</i>
Pacific Power/PPL	91%	4%	85%	3%
Rocky Mountain Power/Utah Power	1%	91%	3%	83%

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

BLUE = significantly higher than 2014

RED = significantly lower than 2014

Advertising & Communication Channels 2010-2015

- Among Rocky Mountain Power customers, recall of *newspaper, radio, and website* advertisements or communications decreased significantly between 2014 and 2015.
- Advertising/communication channel recall has not changed significantly from 2014 to 2015 among Pacific Power customers .

Advertising & Communication Channels	2010		2011		2012		2013		2014		2015	
	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power
	(n=220)	(n=218)	(n=300)	(n=300)	(n=200)	(n=200)	(n=200)	(n=200)	(n=200)	(n=200)	(n=208)	(n=201)
Television	49%	69%	53%	65%	30%	58%	32%	46%	23%	48%	30%	42%
Bill insert	24%	15%	33%	18%	39%	24%	28%	18%	40%	24%	38%	27%
Direct mail	11%	10%	14%	10%	20%	14%	17%	14%	18%	13%	23%	18%
Email	--	--	--	--	--	--	--	--	--	--	13%	11%
Newspaper	27%	23%	18%	28%	18%	14%	16%	12%	18%	18%	13%	8%
Radio	5%	16%	8%	15%	6%	10%	6%	14%	4%	12%	3%	4%
Website (PP/RMP)	5%	5%	3%	4%	3%	4%	6%	5%	4%	8%	5%	3%
Billboard	2%	4%	3%	4%	4%	10%	2%	6%	4%	7%	2%	4%
Magazine	2%	0%	1%	1%	3%	<1%	2%	2%	2%	2%	1%	2%
Other channels	2%	4%	3%	6%	11%	11%	12%	15%	11%	10%	3%	6%
Don't remember/Don't know	8%	5%	2%	3%	4%	4%	6%	4%	7%	4%	1%	4%

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

BLUE = significantly higher than 2014

RED = significantly lower than 2014

Pacific Power - Unaided & Aided Message Recall 2010-2015

Messages Recalled	Pacific Power											
	Unaided						Aided					
	2010 (n=220)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2014 (n=200)	2015 (n=208)	2010 (n=220)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2014 (n=200)	2015 (n=208)
Using energy wisely	14%	15%	12%	12%	15%	17%	49%	54%	48%	45%	49%	44%
Energy efficiency programs	17%	19%	17%	21%	17%	15%	50%	48%	40%	34%	45%	42%
Renewable or alternative energy	20%	22%	12%	16%	14%	8%	41%	43%	38%	43%	43%	43%
Billing or energy assistance	7%	6%	12%	4%	6%	5%	35%	38%	36%	40%	44%	42%
Blue Sky Renewable Energy*	--	--	--	--	--	7%	--	--	--	--	--	46%
Being Wattsmart	n/a	3%	4%	2%	4%	5%	n/a	28%	34%	34%	43%	43%
Electrical safety	12%	9%	6%	4%	2%	4%	38%	37%	32%	28%	39%	37%
Preparing for power outages	1%	4%	1%	1%	2%	1%	34%	35%	39%	29%	39%	38%
Working to keep your power on	1%	5%	2%	<1%	3%	1%	29%	37%	25%	22%	29%	30%
Programs such as equal pay/customer guarantees	4%	3%	1%	4%	6%	1%	25%	28%	28%	20%	23%	32%
Planning for your future energy needs	5%	3%	2%	2%	2%	1%	26%	34%	21%	27%	26%	28%
System/infrastructure improvements	4%	2%	2%	<1%	2%	2%	10%	11%	10%	8%	8%	25%
Environment friendly	2%	5%	2%	3%	5%	1%	n/a	n/a	n/a	n/a	n/a	n/a
Don't remember/Don't know	36%	37%	33%	30%	33%	39%	10%	5%	8%	11%	6%	16%

Overall, the three communication messages cited most often by Pacific Power customers are:

- Using energy wisely
- Energy efficiency programs
- Blue Sky Renewable Energy

Aided recall of both “programs such as equal pay” and “system infrastructure improvements” increased significantly from 2014.

*Blue Sky Renewable Energy was introduced 2015.

BLUE = significantly higher than 2014
RED = significantly lower than 2014

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

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

Rocky Mt. Power - Unaided & Aided Message Recall 2010-2015

Messages Recalled	Rocky Mt. Power											
	Unaided						Aided					
	2010 (n=218)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2014 (n=200)	2015 (n=201)	2010 (n=218)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2014 (n=200)	2015 (n=201)
Using energy wisely	21%	19%	20%	18%	19%	18%	57%	59%	47%	50%	53%	41%
Being Wattsmart	n/a	3%	4%	6%	7%	7%	n/a	62%	58%	60%	59%	57%
Energy efficiency programs	26%	24%	18%	22%	14%	13%	51%	51%	44%	41%	50%	42%
Billing or energy assistance	2%	5%	6%	2%	8%	4%	28%	30%	30%	29%	40%	26%
Renewable or alternative energy	7%	13%	5%	4%	7%	4%	44%	38%	36%	38%	39%	35%
Working to keep your power on	4%	4%	2%	1%	5%	3%	36%	46%	32%	30%	36%	24%
Blue Sky Renewable Energy*	--	--	--	--	--	4%	--	--	--	--	--	36%
Electrical safety	9%	11%	8%	8%	8%	9%	39%	31%	30%	28%	33%	27%
Programs such as equal pay/customer guarantees	7%	2%	3%	1%	3%	0%	29%	37%	30%	28%	35%	25%
Planning for your future energy needs	3%	1%	<1%	1%	3%	1%	32%	32%	28%	23%	31%	20%
Preparing for power outages	2%	2%	4%	<1%	3%	3%	26%	27%	32%	34%	32%	28%
System/infrastructure improvements	2%	2%	1%	<1%	1%	2%	11%	18%	12%	12%	13%	17%
Environment friendly	2%	4%	1%	1%	1%	0%	n/a	n/a	n/a	n/a	n/a	n/a
Don't remember/Don't know	33%	32%	36%	25%	31%	34%	7%	2%	8%	8%	4%	17%

Overall, the three communication messages cited most often by Rocky Mountain Power customers are:

- Being Wattsmart
- Energy efficiency programs
- Using energy wisely

Unaided and aided mention of “billing or energy assistance,” “Working to keep your power on,” “Using energy wisely,” “Planning for future energy needs” and “Programs such as equal pay” all decreased from 2014 in aided awareness.

*Blue Sky Renewable Energy was introduced 2015.

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?

BLUE = significantly higher than 2014

RED = significantly lower than 2014

Importance of Communication Messages 2010-2015

- Among Rocky Mountain Power customers, the percentage rating “system/infrastructure improvements” as very important decreased significantly between 2014 and 2015.

Advertising & Communication Channels (% “very important”)	2010		2011		2012		2013		2014		2015	
	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power	Pacific Power	Rocky Mt. Power
	(n=220)	(n=218)	(n=300)	(n=300)	(n=200)	(n=200)	(n=200)	(n=200)	(n=200)	(n=200)	(n=208)	(n=201)
Electrical safety	75%	73%	73%	70%	72%	66%	66%	72%	72%	69%	77%	66%
Using energy wisely	69%	67%	69%	66%	70%	66%	66%	70%	71%	65%	75%	65%
Energy efficiency programs	67%	58%	62%	58%	59%	58%	56%	56%	61%	60%	65%	57%
Preparing for power outages	60%	56%	55%	51%	62%	54%	54%	58%	57%	57%	59%	57%
Being Wattsmart	n/a	n/a	43%	47%	54%	47%	47%	54%	54%	48%	48%	54%
Working to keep your power on	69%	60%	58%	58%	60%	52%	60%	63%	65%	53%	62%	57%
Renewable or alternative energy	60%	53%	54%	47%	52%	46%	48%	45%	54%	46%	53%	47%
Planning for your future energy needs	46%	48%	52%	45%	41%	46%	43%	46%	44%	45%	42%	38%
Billing or energy assistance	41%	33%	43%	32%	50%	26%	40%	40%	49%	39%	44%	33%
Programs such as equal pay/customer guarantees	32%	34%	37%	33%	34%	34%	33%	34%	36%	36%	35%	34%
System/Infrastructure Improvements	27%	23%	27%	25%	24%	22%	19%	26%	22%	20%	36%	32%

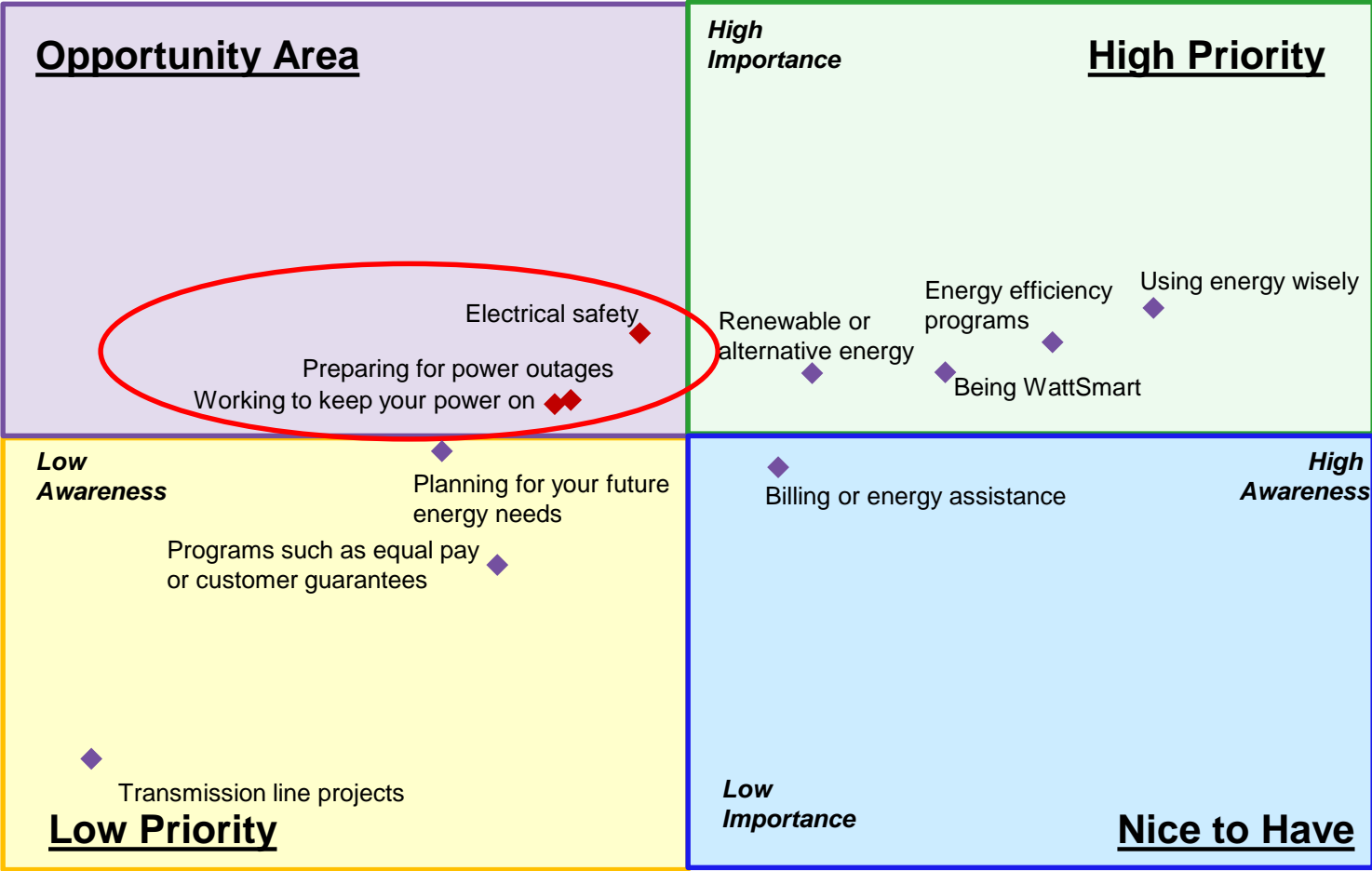
Q8 Do you think the following messages are very important, somewhat important, not very important or not at all important for UTILITY to communicate to customers like yourself?

BLUE = significantly higher than 2014

RED = significantly lower than 2014

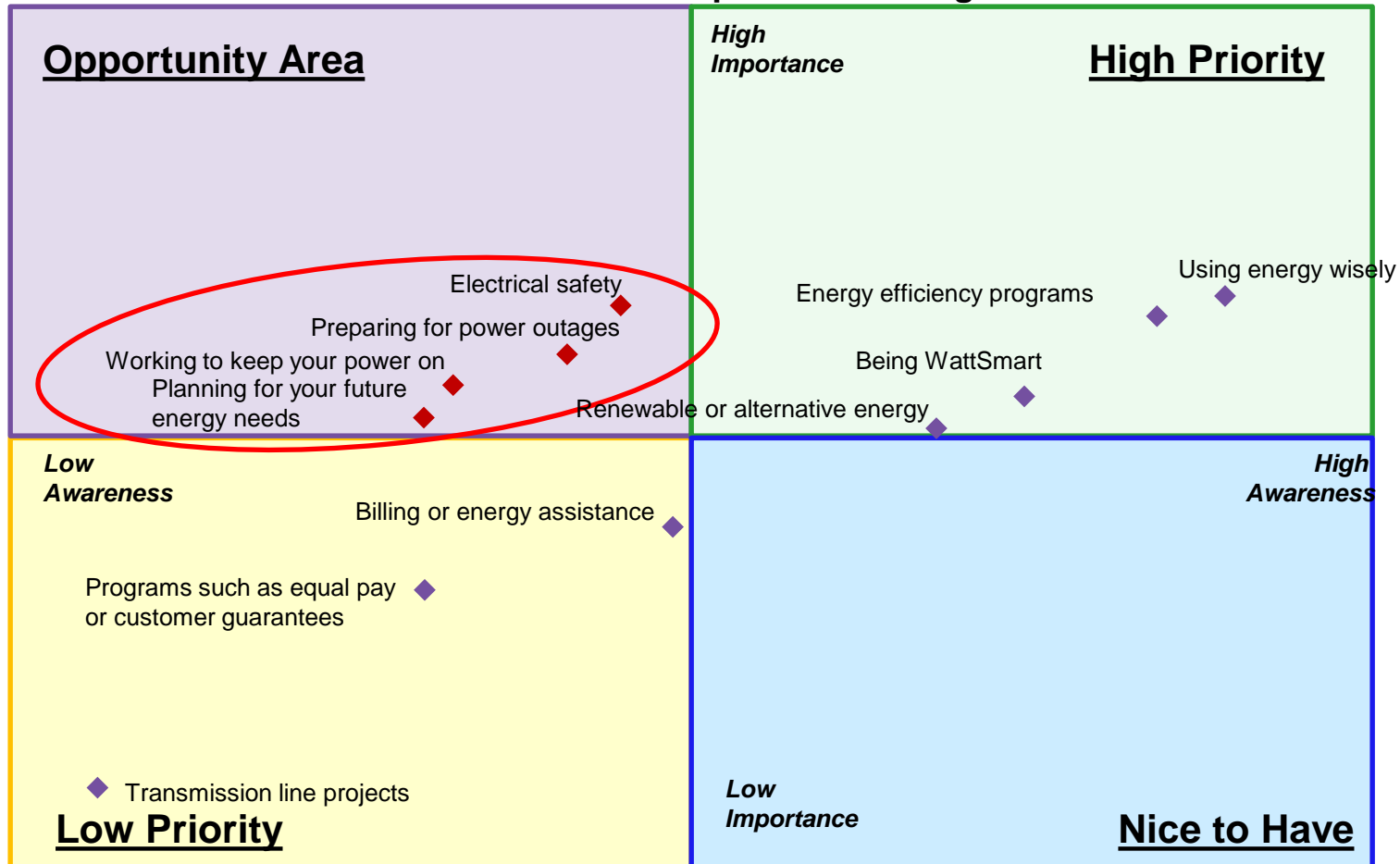
Message Awareness vs. Importance Ratings 2014

2014 Awareness vs. Importance Ratings



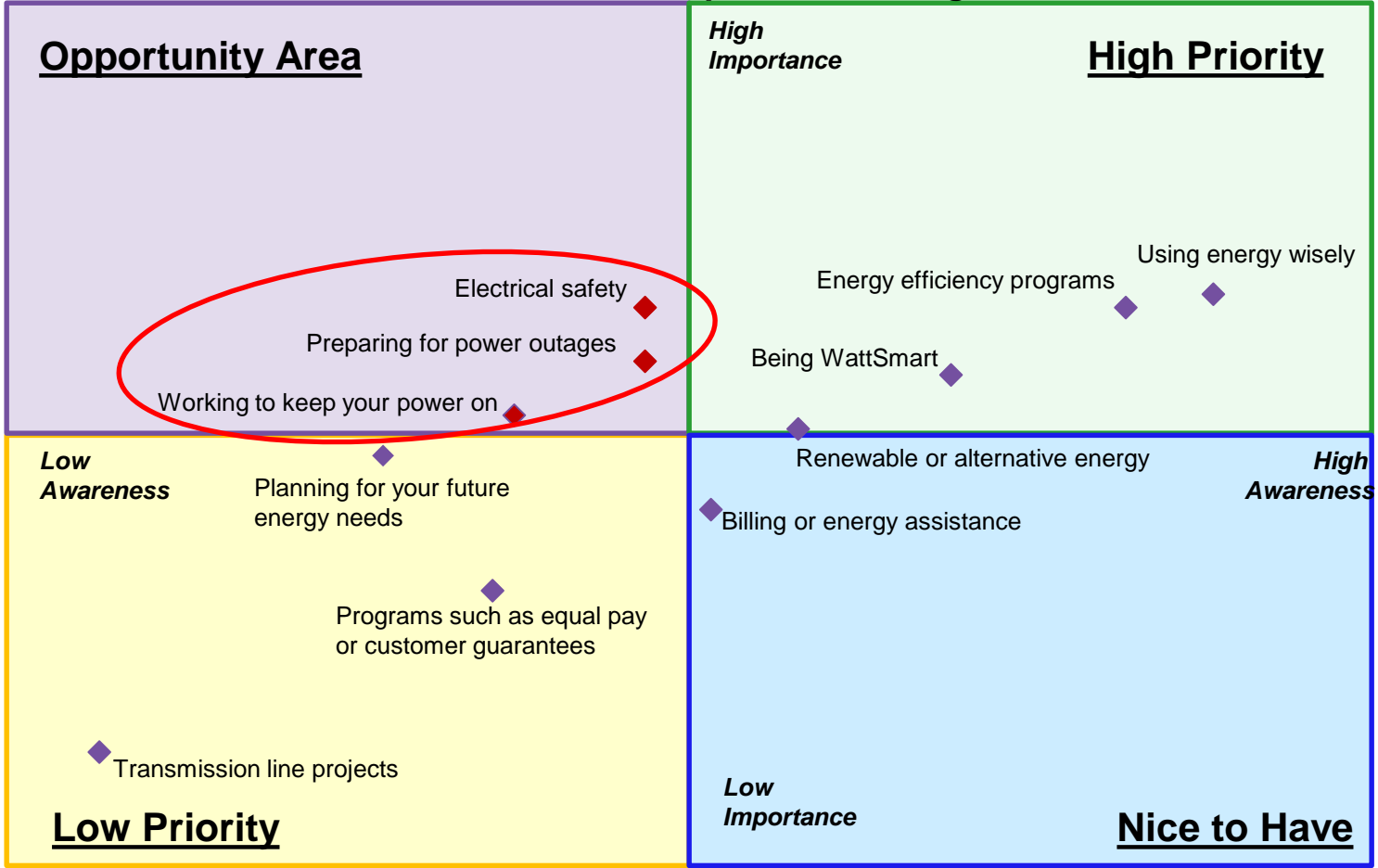
Message Awareness vs. Importance Ratings 2013

2013 Awareness vs. Importance Ratings



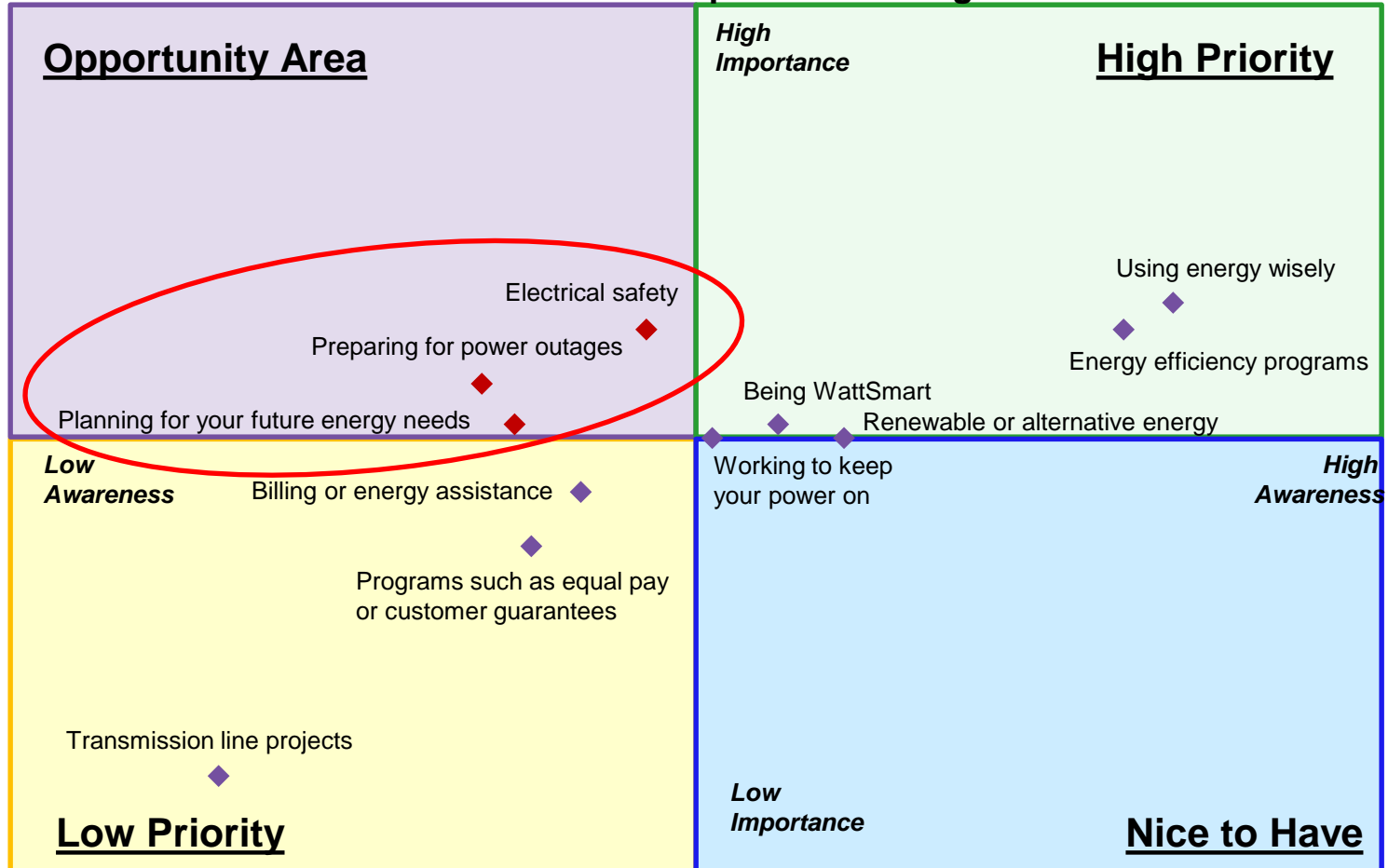
Message Awareness vs. Importance Ratings 2012

2012 Awareness vs. Importance Ratings



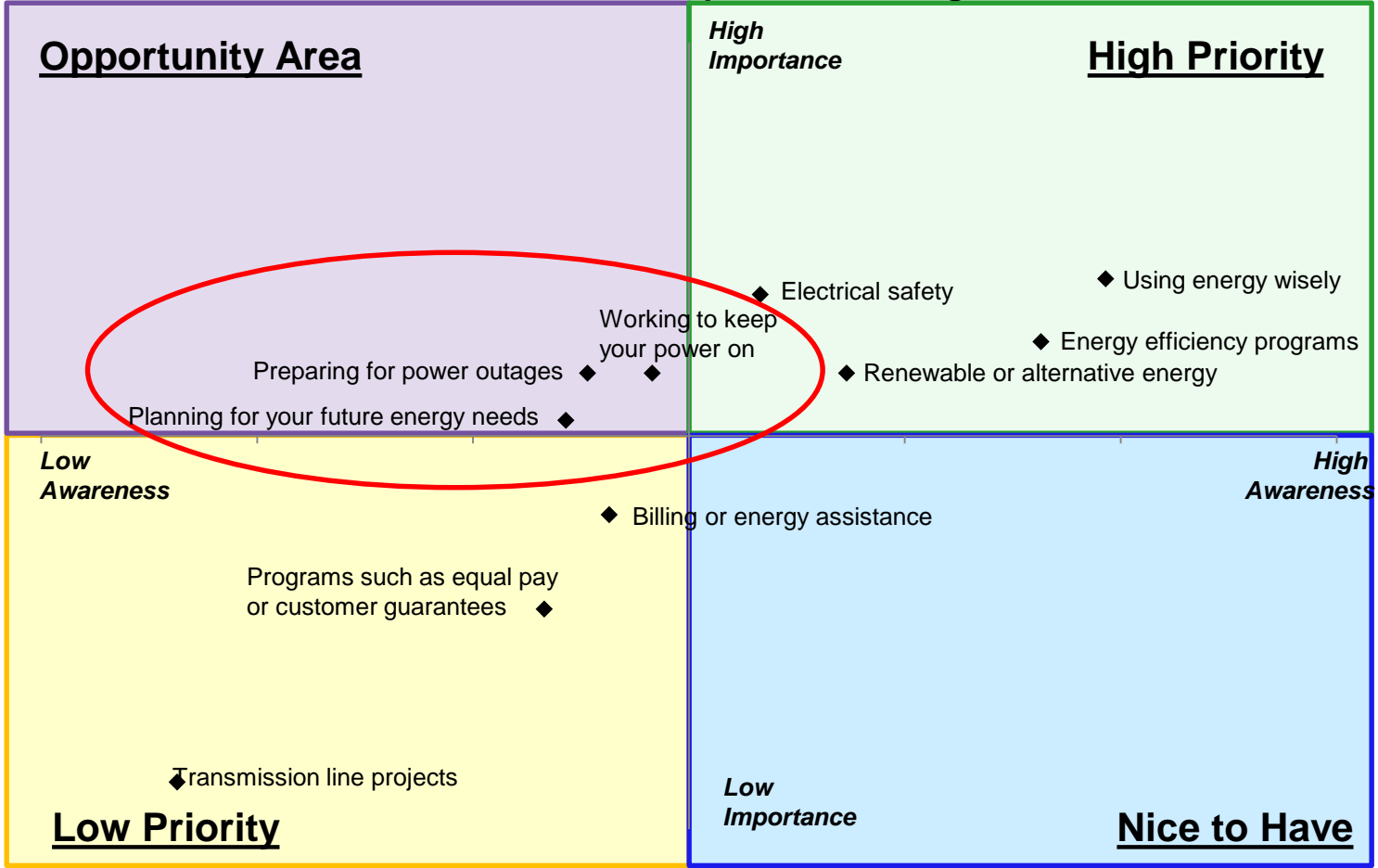
Message Awareness vs. Importance Ratings 2011

2011 Awareness vs. Importance Ratings



Message Awareness vs. Importance Ratings 2010

2010 Awareness vs. Importance Ratings



Additional Suggested Messages 2010-2015

- Besides the 11 messages tested on the previous slides, customers were asked for other suggested messages or topics that their electric utility should be communicating to customers.

Other Important Topics	Pacific Power						Rocky Mt. Power					
	2010 (n=220)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2014 (n=200)	2015 (n=208)	2010 (n=218)	2011 (n=300)	2012 (n=200)	2013 (n=200)	2014 (n=200)	2015 (n=201)
All information provided is sufficient	15%	16%	18%	10%	24%	16%	18%	22%	13%	12%	26%	19%
Alternative Energy/Energy Efficiency	19%	19%	11%	11%	17%	8%	18%	14%	11%	9%	13%	6%
Breakdown of how to practice energy efficiency/info on energy efficient appliances	10%	9%	3%	5%	5%	1%	9%	6%	5%	4%	4%	2%
Investment in alternative (green) energy sources	8%	9%	6%	5%	9%	2%	6%	7%	4%	4%	3%	2%
Energy conservation tips	n/a	n/a	2%	2%	3%	5%	n/a	n/a	1%	0%	4%	2%
Energy incentive programs	1%	1%	2%	1%	0%	-	3%	1%	2%	1%	2%	<1%
Billing and Payment	17%	13%	3%	5%	5%	3%	12%	9%	5%	4%	3%	1%
Economically sensitive billing practices/programs	10%	6%	1%	1%	1%	<1%	5%	4%	<1%	2%	2%	1%
More detailed billing information/customer usage summaries	7%	7%	2%	4%	4%	3%	7%	5%	4%	2%	1%	-
Corporate Information	7%	15%	8%	5%	10%	8%	8%	16%	12%	4%	9%	4%
Information on company decisions/practices/operations	5%	5%	2%	0%	3%	3%	2%	8%	4%	1%	4%	2%
Rate increase information	n/a	2%	2%	4%	3%	2%	n/a	0%	1%	3%	2%	-
Customer service access	2%	3%	3%	0%	0%	1%	2%	4%	5%	0%	1%	<1%
What makes them dependable	0%	2%	0%	0%	1%	<1%	1%	2%	1%	0%	0%	-
Power outage information	0%	3%	2%	4%	3%	2%	1%	1%	1%	2%	2%	2%
Energy Safety	4%	5%	2%	2%	1%	4%	5%	2%	<1%	3%	1%	3%
Don't remember/Don't know	24%	17%	14%	48%	29%	33%	24%	21%	23%	58%	28%	36%
None/Nothing more	22%	24%	32%	1%	10%	13%	25%	24%	31%	0%	15%	18%

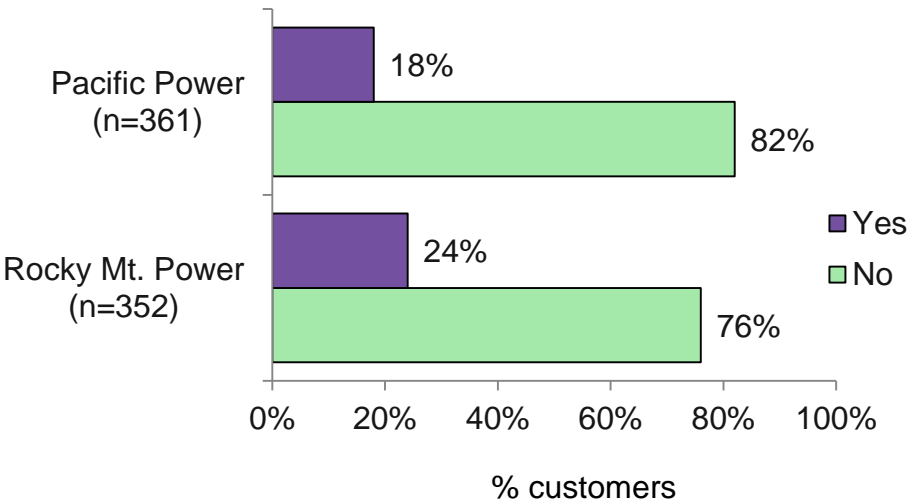
Q9 What other messages or topics do you think UTILITY should be communicating to customers in their ads and communications?

BLUE = significantly higher than 2014
RED = significantly lower than 2014

“Let’s Turn the Answers On” 2010-2015

- Rocky Mountain Power customers remain more likely than Pacific Power customers to recall communications with the message “Let’s Turn the Answers On.” However, awareness among Rocky Mountain Power customers has declined over the past five years.
- Among Pacific Power customers, recall of “Let’s Turn the Answers On” has remained consistent since 2010.

**2015 Recall of
“Let’s Turn the Answers On”**



2010 Pacific Power (n=220)	2011 Pacific Power (n=500)	2012 Pacific Power (n=350)	2013 Pacific Power (n=350)	2014 Pacific Power (n=350)	2010 Rocky Mt. Power (n=218)	2011 Rocky Mt. Power (n=500)	2012 Rocky Mt. Power (n=350)	2013 Rocky Mt. Power (n=350)	2014 Rocky Mt. Power (n=350)
22% yes	20% yes	19% yes	19% yes	15% yes	42% yes	37% yes	33% yes	32% yes	29% yes
78% no	80% no	81% no	81% no	85% no	58% no	63% no	67% no	68% no	71% no

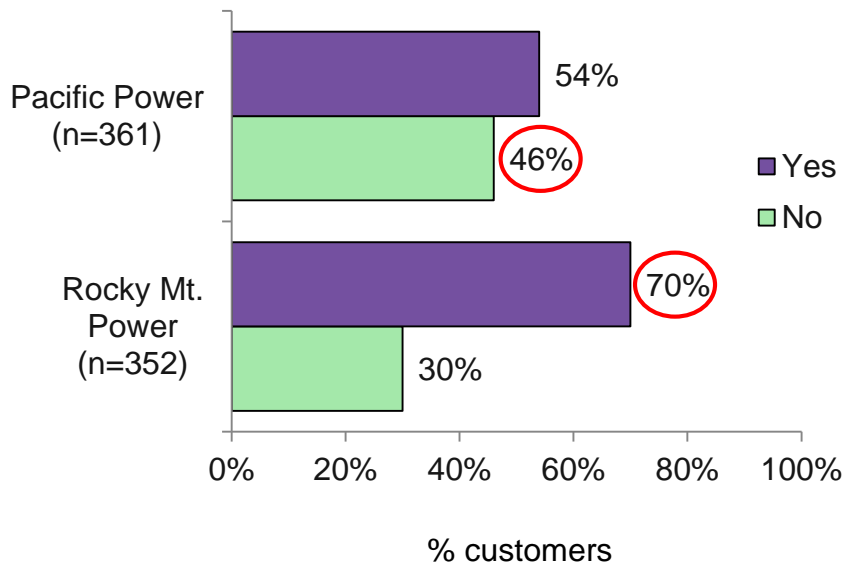
 = significantly higher than other utility

QN15A Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

“Being Wattsmart” 2013-2015

- Recall of “Being Wattsmart” has increased significantly among Rocky Mountain Power customers from 2014 to 2015.
 - Rocky Mountain Power customers are significantly more likely than Pacific Power customers to recall “Being Wattsmart.”

2015 Recall of
“Being Wattsmart”



2013 Pacific Power (n=350)	2014 Pacific Power (n=350)	2013 Rocky Mt. Power (n=350)	2014 Rocky Mt. Power (n=350)
46% yes	49% yes	60% yes	63% yes
54% no	51% no	40% no	37% no

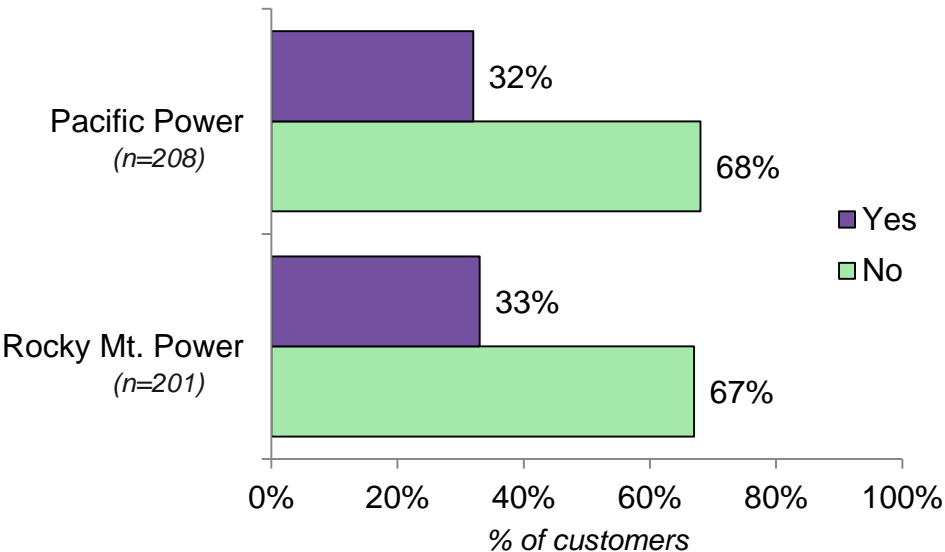
 = significantly higher than other utility

QN15B Do you remember seeing, hearing or reading the following statement in any of the UTILITY ads or communications?

Persuasiveness of Advertising in Call to Action 2010-2015

- For Pacific Power and Rocky Mountain Power, the percentage of customers persuaded to take action based on the advertisements remained consistent with 2014.

2015 Took Action Based on Advertising



2010	2011	2012	2013	2014	2010	2011	2012	2013	2014
Pacific Power (n=220)	Pacific Power (n=300)	Pacific Power (n=200)	Pacific Power (n=200)	Pacific Power (n=200)	Rocky Mt. Power (n=218)	Rocky Mt. Power (n=300)	Rocky Mt. Power (n=200)	Rocky Mt. Power (n=200)	Rocky Mt. Power (n=200)
22% yes	21% yes	30% yes	31% yes	31% yes	30% yes	39% yes	30% yes	32% yes	33% yes
78% no	79% no	70% no	69% no	70% no	70% no	61% no	70% no	68% no	67% no

 = significantly higher than other utility

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

Unaided EE Program Recall 2013-2015

Program Recall	Oregon			Washington			California			Utah			Wyoming			Idaho		
	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015	2013	2014	2015
	(n=266)	(n=266)	(n=269)	(n=62)	(n=62)	(n=209)	(n=22)*	(n=22)*	(n=24)*	(n=277)	(n=277)	(n=279)	(n=200)	(n=200)	(n=201)	(n=26)*	(n=26)*	(n=204)
Cool Keeper	5%	3%	1%	3%	0%	2%	0%	5%	0%	7%	9%	7%	6%	1%	0%	0%	0%	2%
Home Energy Savings	6%	4%	4%	0%	8%	6%	0%	14%	4%	4%	5%	5%	4%	3%	5%	4%	8%	5%
See Ya Later, Refrigerator	4%	3%	2%	3%	8%	6%	9%	0%	4%	7%	4%	4%	7%	3%	5%	0%	8%	3%
Wattsmart	4%	4%	7%	3%	8%	8%	0%	0%	4%	7%	5%	9%	5%	2%	6%	4%	4%	7%
Low Income Weatherization	6%	4%	4%	5%	2%	4%	5%	14%	4%	4%	1%	2%	5%	1%	1%	0%	8%	3%
Rebates and cashback*	6%	5%	4%	10%	2%	8%	0%	5%	4%	6%	4%	4%	3%	1%	4%	7%	8%	4%
Energy Star New Homes	6%	2%	3%	5%	6%	6%	5%	0%	8%	3%	3%	4%	2%	2%	4%	4%	0%	3%
Home Energy Reports	n/a	11%	3%	n/a	9%	4%	n/a	10%	n/a	n/a	3%	2%	n/a	2%	1%	n/a	n/a	2%
Time of Day	3%	<1%	2%	2%	2%	0%	0%	0%	0%	2%	1%	1%	0%	0%	1%	0%	8%	8%
None	75%	76%	75%	66%	74%	71%	82%	68%	79%	64%	68%	73%	77%	89%	79%	73%	73%	67%

*CAUTION: small sample sizes

*Formerly called "Cool Cash Incentive."

BLUE = significantly higher than 2014
RED = significantly lower than 2014

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