

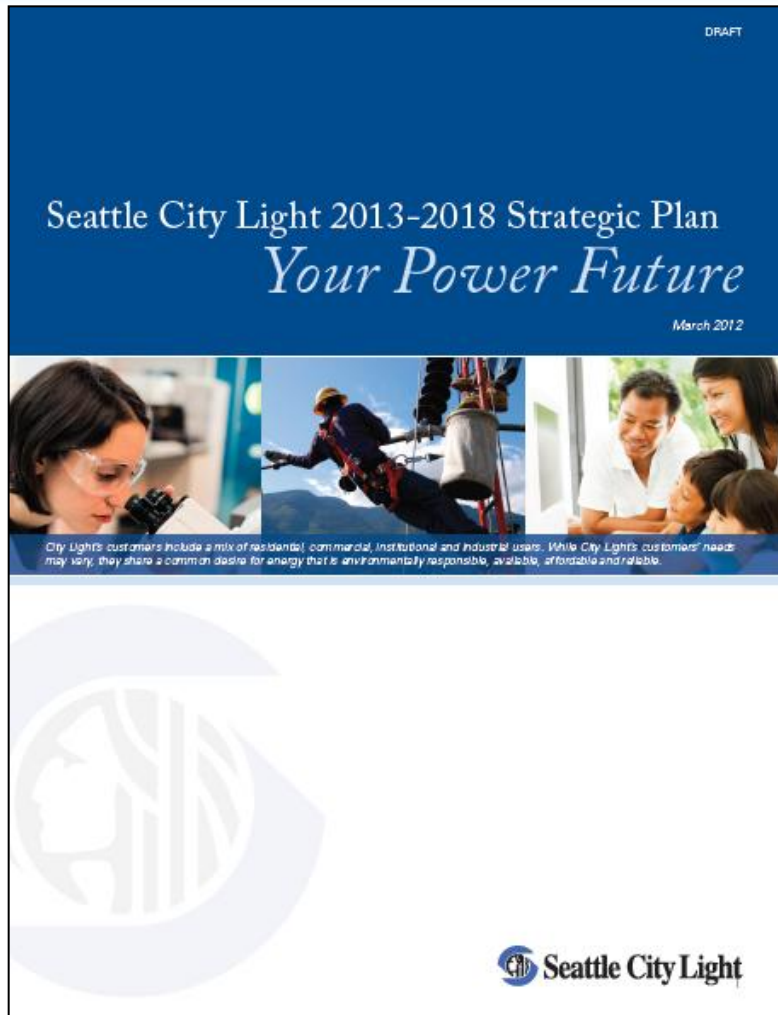
# Seattle City Light

Strategic Plan Survey

April 2012

Cocker  
Fennessy

# Research Goals



- Gather public input on draft Seattle City Light Strategic Plan
- Reach a representative mix of customers and the public
- Explore perceptions, preferences and priorities

# Methodology

- Online survey (independently hosted)
- Nonprobability sample
  - Seattle City Light customers (n=1,236)
    - online panels (n=500)
    - mailings, website, emails, advertisements (n=736)
  - Residential, business and institutional
  - Ages 18 and older

# Methodology

- Fielded March 6-23, 2012
- Data cleaned (for duplicates and anomalies) and analyzed
- Topline and crosstabs produced
  - Crosstabs include t-test for means, independent z-test for percentages. Tested for significance at 95% level.

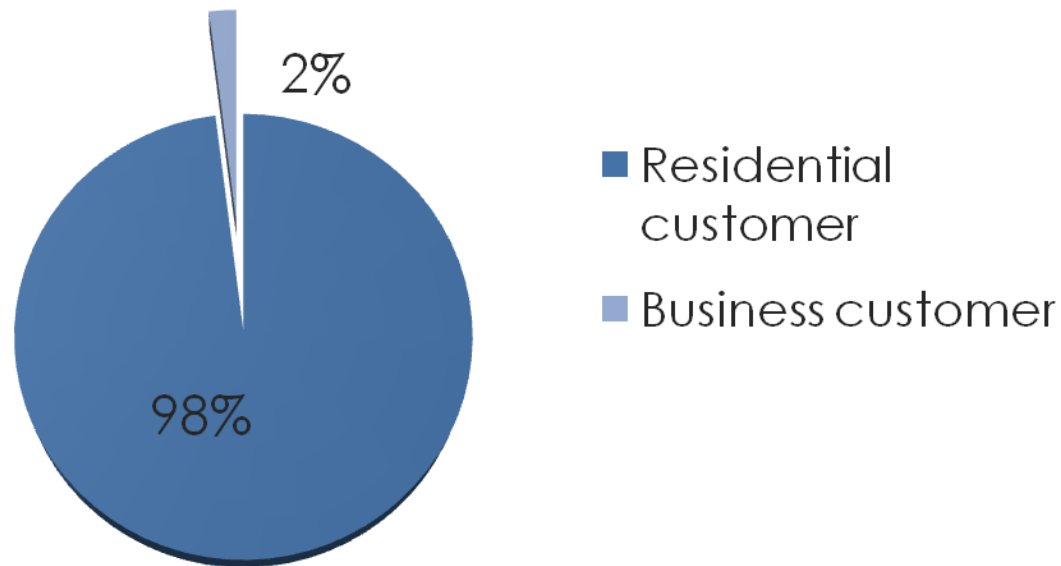
# Key Findings

- Highly positive opinion of Seattle City Light's performance
- Strong desire to minimize rate increases and increase efficiencies
- Solid support for the Strategic Initiatives path
- Strong, but differing, opinions about the Bolder Environmental Initiatives path

# Respondents

Most respondents (98%) answered from the residential perspective.

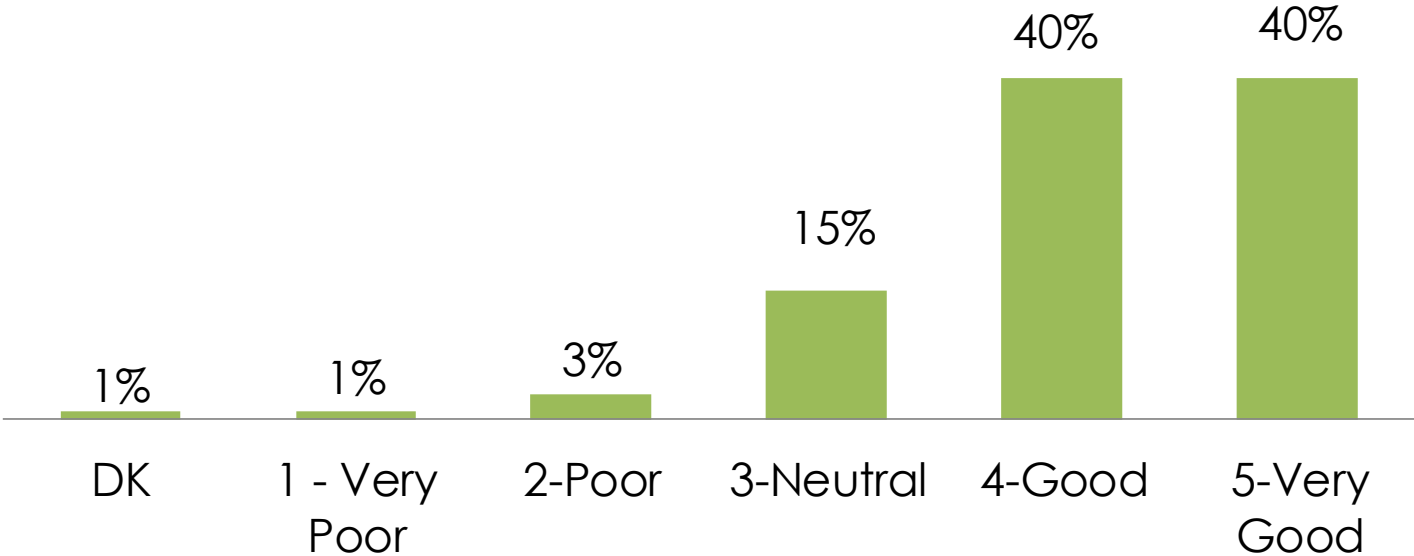
**Summary of Q1 and Q2: Customer Type**  
(Residential/Business/Institutional distribution)



# Seattle City Light Opinion, Overall

80% rate Seattle City Light's performance as good or very good.

**Q10. Overall, if you were to rate Seattle City Light's performance on a scale from 1-5, where 1 is very poor and 5 is very good, how would you rate the Utility?**

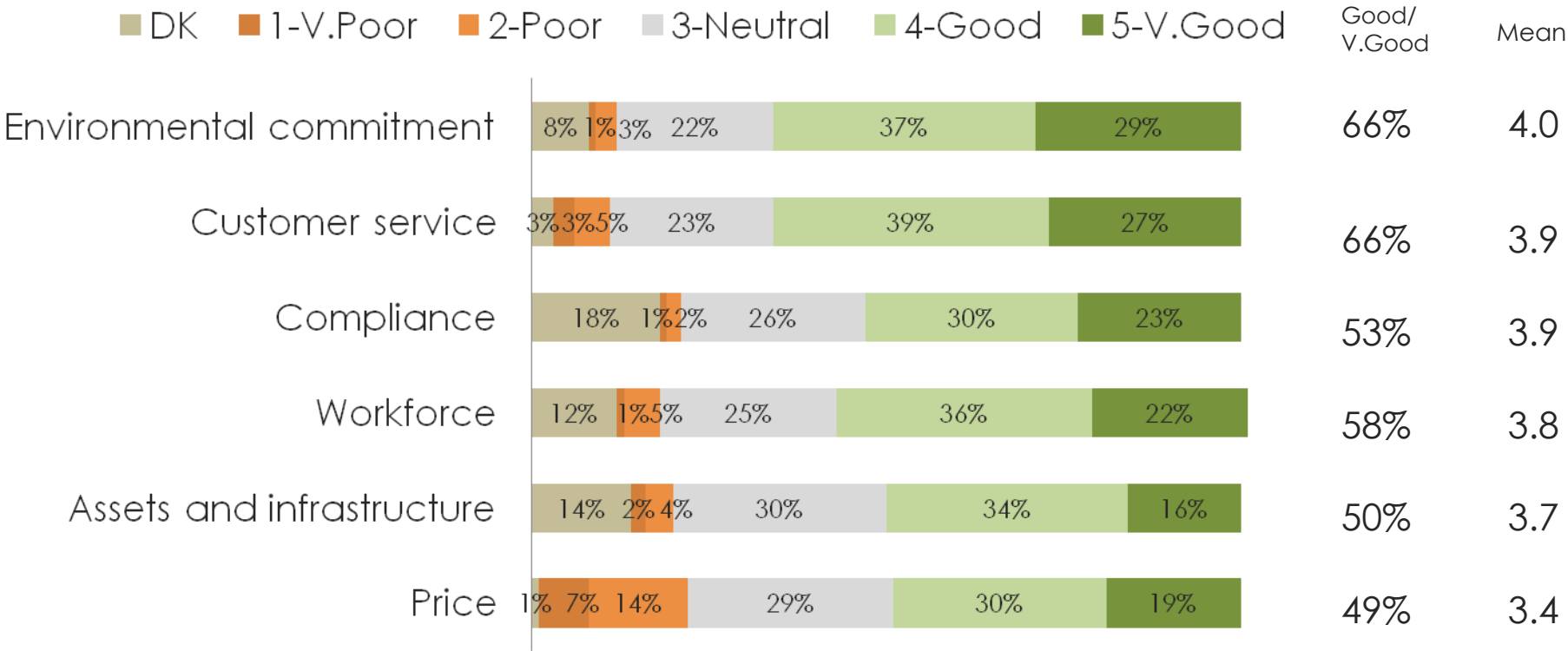


Average (mean): 4.2

# Seattle City Light Opinion, Specific Factors

A majority of respondents rate Seattle City Light favorably on nearly all factors.

Q11-16. How would you rate Seattle City Light on the following factors, 1 is very poor and 5 is very good...?





# Spending Priorities

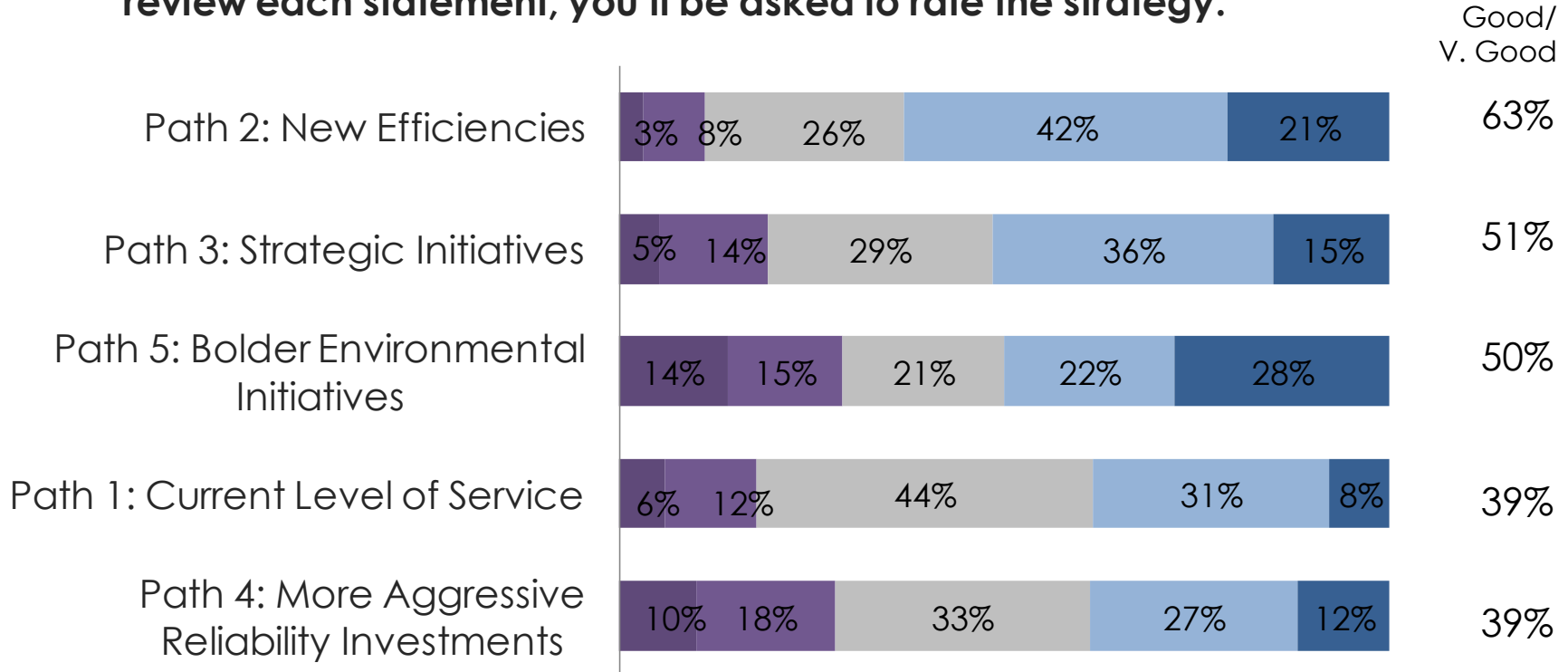
Minimizing rate increases is a top concern.

Q.	<b>Allocate a total of \$100 across the following areas. How much should Seattle City Light spend...</b>	<b>Mean (\$)</b>
19.	Minimizing rate increases?	26.3
20.	Increasing power resources from new renewable energy sources?	19.5
21.	Increasing efficiencies using technology that improves the Utility's performance?	14.4
22.	Improving the electric system's reliability	11.1
23.	Increasing conservation results?	11.0
24.	Improving rate predictability?	5.6
25.	Improving safety practices?	5.2
26.	Increasing work performance?	4.3
27.	Improving your ability to more easily manage your utility account online?	2.7

# Path Ratings

Paths 2, 3 and 5 were rated favorably by a majority of respondents. No paths received more than a 29% negative rating.

**Q28. Below are some statements about each path. After you review each statement, you'll be asked to rate the strategy.**



■ 1-V.Poor ■ 2-Poor ■ 3-Fair ■ 4-Good ■ 5-V.Good

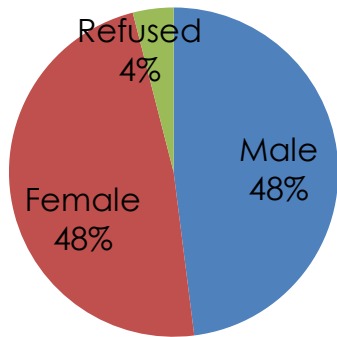
# Path Rankings

34% selected Path 5 as their top choice. When viewed as an average, Paths 2 and 3 were more popular.

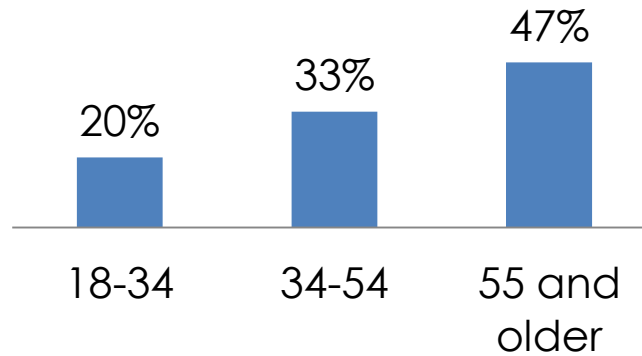
Please rank the paths in order of preference:	Ranked #1 (Most Preferred)	Ranked #5 (Least Preferred)	Weighted Average (Higher number, more preferred)	#1 choice of ... Statistically significant supporters (SCL ratings crosstab)
Path 2: New Efficiencies	31%	4%	3.6	<ul style="list-style-type: none"> <li>• 38% who rated rate price poor/v. poor</li> </ul>
Path 3: Strategic Initiatives	10%	7%	3.1	<ul style="list-style-type: none"> <li>• 11% who rated price good/ v. good</li> </ul>
Path 5: Bolder Environmental Initiatives	34%	39%	2.9	<ul style="list-style-type: none"> <li>• 35% who rated customer service, 33% who rated workforce, and 39% who rated price good/v. good</li> </ul>
Path 1: Current Level of Service/Baseline	18%	30%	2.9	<ul style="list-style-type: none"> <li>• 31% who rated price poor/v. poor</li> <li>• 32% who rated workforce poor/v. poor</li> </ul>
Path 4: More Aggressive Reliability	7%	21%	2.5	<ul style="list-style-type: none"> <li>• 9% who rated price good/v. good</li> </ul>

# Survey Demographics

## Gender

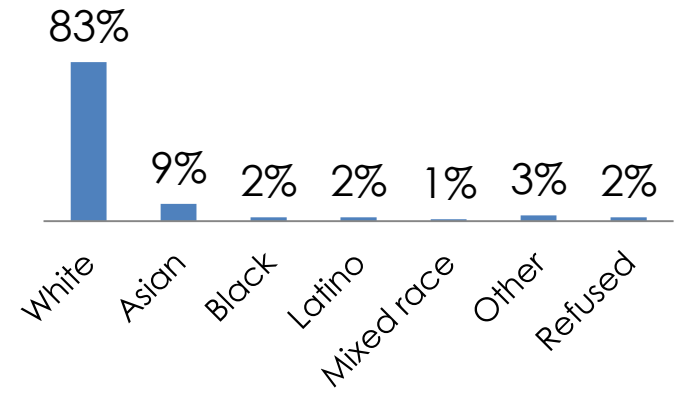


## Age

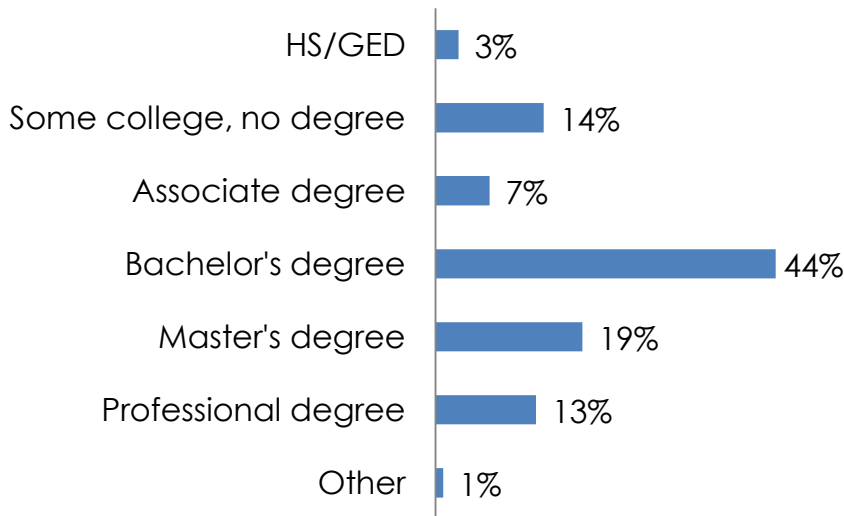


## Race/ethnicity

(multiple responses allowed)



## Highest level of education completed



## Annual household income before taxes

