

**NW Natural Service
Information Campaign:
Post Television Advertising
Tracking Results**

May 2006

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NW Natural Service Information Campaign: Post Advertising Results

Data compiled by Consumer Research & Analysis, May, 2006

Executive Summary.

This report addresses results from two surveys – the first setting a benchmark of customer awareness for various informational services provided by NW Natural and the second tracking changes these awareness following a winter television and print ad campaign specifically featuring the Equal Pay and Web Tool advertisements. The benchmark survey ran in November, 2005, sampling 250 NW Natural customers. The follow-up tracking survey ran in May, 2006. Both surveys were administered to randomly selected customer samples via telephone.

Awareness of NW Natural services increased substantially following the television and newspaper advertising campaign running from December, 2005, through April, 2006. As far as tracking awareness of bill payment options and website tools, *awareness for Equal Pay* increased three times over initial levels in November, 2005, and *awareness for NW Natural Internet Tools* doubled.

Awareness of energy-saving tips and information on *NW Natural's website* lifted from the November baseline by almost 20 percent. However, by far customers discovered this information in their bills or while they were already on NW Natural's website. Further, use of the Company website to discover energy-saving tips information is increasing (up from 6.8% to 16.8%).

Three-of-five respondents said they were *aware of the ability to sign up for paperless billing on NW Natural's website*. The May survey reflects a strong response to information inserted in bills and among Internet users.

When asked about Equal Pay in November, four-of-five NW Natural customers were *aware of Equal Pay* (79.2%). This awareness level increased in May to 85%. Those aware of Equal Pay did not watch any more or less television than those unaware of the program. When compared to those unaware of Equal Pay, the aware group tended to be more frequent users of the Internet and used newspaper and mixed sources to get their news and information. Over half of those unaware of Equal Pay used television as their primary source of news and information and about one quarter of this group had no access to the Internet.

When those aware of Equal Pay were asked how they found out about the program, the greatest number of customers discovered information about Equal Pay in bill inserts. It appears that knowledge of Equal Pay has been around a while to the point that people are talking about this payment plan and sharing information via word of mouth. The campaign does reflect improved levels of people knowing that they can *sign up for Equal Pay on NW Natural's website*. From November, 2005, to May, 2006, this awareness level improved by over 40 percent – from 37.9% to 54.5%.

When those who were aware of the process were asked whether they *used the Equal Pay option*, seven-of-ten (72.2%) said they did. Of the entire survey population (n=300), this number is about 60 percent. This means that NW Natural has about 40 percent of customers who are unaware of Equal Pay or, if aware, do not currently use the program.

Those using Equal pay tend to watch more television daily over those not using Equal Pay, with significantly more citing television as their primary source of news and information (44.7%, aware of Equal Pay vs. 34.6% not aware of Equal Pay). There was no difference in the frequency of Internet use between users and non-users.

When asked *why they did not take advantage of the Equal Pay program*, as shown in Table 11, those not using Equal Pay (but who knew about the program) fell into four main groups:

- Those who like paying monthly, either preferring to get a low bill in the summer or just seeing no advantage in the program for them;
- Those who didn't like the idea of the program, who didn't trust the program to be equitable or cost-efficient, or who wanted to control their gas use by seeing costs each month;
- Those who haven't thought about joining the program or just haven't gotten around to joining the program; and
- Those who didn't qualify for the program.

While it's apparent that some customers may never select Equal Pay as a payment option, there are others who may, with proper messaging, make the shift. For example, those who want to see their actual monthly gas use and bill amount simply need to be educated to the fact that their bill will show this information while equalizing their actual payment amount. Messages that emphasize advantages of the program in terms of convenient, consistent payments rather than emphasizing smoothing cost peaks and valleys may build a level of need among those who do not find higher winter bills a financial burden.

Overall, the winter advertising campaign lifted awareness of NW Natural's Equal Pay and web tools among its customer base. It appears that the mixed media package using television, print ads and bill inserts work well to get messages across. Adding to the mix, the Company benefits from the high Internet use in its market territory as many found the information they sought on the NW Natural website.

Given the heterogeneity of NW Natural's customer base, there is still have ground to gain as far as getting the information out. Newspaper ads did not score highly in specific recall, but seemed to have some impact when used in combination with other media. While NW Natural's customers generally are frequent users of the Internet (almost three-fourths - 73.7% - use the Internet weekly or more), slightly less than one-in-five respondents have no access to the Internet and must be approached in alternative ways – or have alternate ways to get the information about their billing options. The table below illustrates the differences in media information sources between those with and without Internet access.

What is your primary source of news and information? <i>Sorted by Internet and Non-Internet Users</i>	Non Internet n=53 (100.0%)	Internet Users n=300 (100.0%)	Total n=300 (100.0%)
Television	50.9%	37.2%	39.7%
Newspaper	26.4%	23.5%	24.0%
More than one source/A mix	13.2%	14.6%	14.3%
Internet	0.0%	13.8%	11.3%
Radio	5.7%	9.7%	9.0%
Word of mouth/Other people	0.0%	0.4%	0.3%
None - No news source	1.9%	0.0%	0.3%
Other	0.0%	0.4%	0.3%
Don't know	1.9%	0.4%	0.7%

NW Natural Service Information Campaign: Post Advertising Results

Data compiled by Consumer Research & Analysis, May, 2006

Background

Early June, 2005, customers were surveyed for their awareness of utility rate changes during the last twelve months and their opinions of NW Natural as various rate increase reasons are discussed. The goal of the survey was to collect a wide range of opinions and perceptions that could be used to design an advertising campaign to minimize negative customer reactions to the new rate increase that would begin October, 2005.

That survey showed another increase would likely impact overall satisfaction with NW Natural's customer service. However, further probing indicated fewer than expected customers actually blamed NW Natural for the increase. NW Natural was mentioned as a cause for increasing natural gas costs (greed/NW Natural wants profit and NW Natural business expenses/Duty to stockholders/Company controlling expenses) by approximately one-fifth of respondents (19.2%). Looking at it a different way, about four-of-five customers cited reasons for costs increasing that did not involve NW Natural.

This survey asked opinions of possible talking points, particularly

- That NW Natural cannot, by law, make a profit from the cost of natural gas – and may only pass these increases on at no additional cost, and
- That electric companies generating electricity with natural gas can waste up to half the natural gas through the process.

These talking points did not seem to be a huge initial influencer of opinion about the Company. Instead, customers indicated that understanding rate increase causes would lessen feelings of frustration and concern when the amount they pay for natural gas goes up. They also indicated they wanted the Company to help by providing ways to cope with another rate change. They were looking for suggestions on how to more effectively use natural gas and on how to hold costs down.

Using the rate increase survey findings, a series of customer focus groups tested advertising concepts that addressed reasons for rate increases, ways to spread costs (Equal Pay), and tools on the NW Natural website that would help customers better understand and assess their bills. The focus groups strongly pushed for ads focused on Equal Pay and Web Tools. Two television commercials resulted, featuring:

- The benefits spreading costs using Equal Pay, and
- NW Natural's Internet Web Tools, including the Bill Analyzer and easy payment options.

This report addresses results from two surveys – the first setting a benchmark of customer awareness for various informational services provided by NW Natural and the second tracking changes these awareness following a winter television and print ad campaign specifically featuring the Equal Pay and Web Tool advertisements. The benchmark survey ran in November, 2005, sampling 250 NW Natural customers. The follow-up tracking survey ran in May, 2006. Both surveys, included in Appendix A, were administered to randomly selected customer samples via telephone.

Findings

Advertising Awareness.

Table 1.

In the past year, have you seen or heard advertising about services offered by NW Natural?	Nov. '05 n=250 (100.0%)	May '06 n=300 (100.0%)
No, have not heard	48.0%	30.3%
Don't know	2.8%	5.3%
Maybe, I'm not sure	7.6%	10.0%
Yes, I have heard	41.6%	54.3%
Total, yes and maybe responses	49.2%	64.3%

Table 1 shows that awareness of NW Natural services increased substantially following the television and newspaper advertising campaign running from December, 2005, through April, 2006.

Given that commercial messages include other NW Natural issues, such as marketing campaigns, safety messaging and news articles on sustainability and rate issues, it was expected that respondents would give a variety of responses when asked exactly what the advertising said and where they saw or heard the information. Table 2 reflects this information. As far as tracking awareness of bill payment options and website tools, topics reflected in the advertising under test, awareness for Equal Pay increased three times over initial levels in November, 2005, and awareness for NW Natural Internet Tools doubled.

Table 2.

What did the advertising say? <i>(multiple responses)</i>	Nov. '05 n=123 (100.0%)	May '06 n=193 (100.0%)
Efficient gas use/Sustainability	12.2%	9.8%
Natural gas safety	9.8%	14.5%
Selling new equipment	8.9%	3.6%
Rate increase	3.3%	1.6%
Gas is better/Clean/Warm	3.3%	11.4%
Bill payment options	2.4%	7.3%
Internet tools/Evaluate your gas bill	0.8%	1.6%
Equipment safety inspection/Service	1.6%	3.1%
Other	0.0%	1.0%
Don't know/Don't remember	63.4%	54.4%
Where see/hear the information? <i>(multiple responses)</i>	Nov. '05 n=123 (100.0%)	May '06 n=193 (100.0%)
TV commercial	36.6%	47.7%
Included in gas bill	32.5%	32.6%
News story (TV, radio, press)	8.1%	11.4%
Newspaper ad	6.5%	2.6%
NWN Web site	0.8%	2.1%
Radio ad	8.1%	1.6%
Gas company employees/Street of Dreams	1.6%	0.5%
Internet	0.8%	0.0%
Other (Friends/Family/Magazines)	0.8%	2.0%
Don't know/Don't remember	12.2%	8.8%

While newspaper ads showed no lift, information awareness via television commercials and NW Natural's website increased during the testing period. Cross tabulations showed little difference between the hours of television watched and awareness of service advertising. Those unaware of this advertising tended to be more likely to use the Internet or newspapers as their primary source of

information while those who are aware of the advertising tended to tap a mixture of news sources. Internet use did not vary between those who had seen NW Natural service advertising and those who had not.

Website Tips and Information.

Awareness of energy-saving tips and information on NW Natural’s website lifted from the November baseline by almost 20 percent. (See Table 3.) However, by far customers discovered

Table 3.

Are you aware that you can get energy-saving tips and information on NW Natural's web site?	Nov. '05 n=250 (100.0%)	May. '06 n=300 (100.0%)
No, not aware	47.2%	36.7%
Yes, am aware	52.8%	63.3%

this information in their bills or while they were already on NW Natural’s website. As shown in Table 4, it appears that the use of the Company website is increasing (up from 6.8% to 16.8%). Growth in numbers finding information about tips on the website from television commercials is still low, although up from November, 2005, levels.

Table 4.

How did you find out about the tips and information? <i>(multiple responses)</i>	Nov. '05 n=132 (100.0%)	May. '06 n=190 (100.0%)
Insert in bill	47.0%	52.1%
On NW Natural's web site	6.8%	16.8%
Common knowledge/Had forever	1.5%	11.1%
Gas company employees	4.5%	4.7%
Friends or family	6.8%	3.7%
TV Commercial	3.0%	3.7%
Newspaper ad	0.0%	1.1%
Radio ad	0.8%	1.1%
Energy Trust	0.0%	1.1%
Gas dealer or distributor	0.8%	1.1%
NW Natural brochure/Handout	3.8%	0.0%
Don't know/Don't remember	17.4%	6.3%
Missing/No response	8.3%	0.0%

There was little difference between those stating they were aware of website tips and information and those unaware in terms of hours of television watched and primary sources of news and information. However, those using the Internet every day were nearly half again as many as those unaware of Website tips (61.6% aware, vs. 40.0% not aware). The NW Natural website can become a strong source of information as over half of the sample (53.7%) reported using the Internet every day.

Website Paperless Billing.

Three-of-five respondents said they were aware of the ability to sign up for paperless billing on NW Natural’s website. (See Table 5.) While this question was not asked in the November, 2005,

baseline study, Table 6 reflects a strong response to information inserted in bills and among website browsers. As might be expected, minimal differences were seen in the amount of daily television watched between those aware and not aware of paperless billing on the website. However, those aware of paperless billing on the website tended to use the newspaper more for their primary source of news and information and were considerably more frequent users of the Internet over those unaware of paperless billing on the website.

Table 5.

Are you aware that NW Natural offers paperless billing on their web site?	May. '06 n=300 (100.0%)
No, not aware	39.0%
Yes, am aware	61.0%

Table 6.

How did you find out about paperless billing being on NW Natural's website? <i>(multiple responses)</i>	May. '06 n=183 (100.0%)
Insert in bill	56.8%
On NW Natural's web site	19.7%
Common knowledge/Had forever	9.8%
Gas company employees	3.8%
Friends or family	3.3%
TV Commercial	2.2%
NW Natural brochure/Handout	2.2%
Newspaper ad	1.1%
Radio ad	0.5%
Through my bank	2.2%
Don't know/Don't remember	3.3%

NW Natural's Equal Pay Plan.

When asked about Equal Pay in November, four-of-five NW Natural customers were aware of Equal Pay (79.2%). This awareness level increased in May to 85%. Those aware of Equal Pay did not watch any more or less television than those unaware of the program. When compared to those unaware of Equal Pay, the aware group tended to be more frequent users of the Internet and used newspaper and mixed sources to get their news and information. Over half of those unaware of Equal Pay used television as their primary source of news and information and about one quarter of this group had no access to the Internet.

Table 7.

Are you aware that NW Natural offers Equal Pay?	Nov. '05 n=250 (100.0%)	May '06 n=300 (100.0%)
No, not aware	20.8%	15.0%
Yes, am aware	79.2%	85.0%

When those aware of Equal Pay were asked how they found out about the program, numbers did not reflect strong influences from the television ad featuring this message. As shown in Table 8, the greatest number of customers discovered information about Equal Pay in bill inserts. It appears that knowledge of Equal Pay has been around a while to the point that people are talking about this payment plan and decimated information via word of mouth.

Table 8.

How did you find out NW Natural offered Equal Pay? <i>(multiple responses)</i>	Nov. '05 n=198 (100.0%)	May '06 n=255 (100.0%)
Insert in bill	54.5%	57.6%
Friends or family	6.6%	13.3%
Had forever/Common knowledge	2.5%	11.0%
Gas company employees/Fair booth	7.1%	8.6%
TV commercial	6.1%	5.1%
NW Natural web site	1.5%	4.7%
NW Natural brochure/handout	4.5%	1.6%
Radio ad	0.5%	1.6%
Gas dealer or distributor	1.5%	0.4%
Newspaper ad	1.0%	0.4%
Don't know/Don't remember	15.7%	2.7%

The campaign does reflect improved levels of people knowing that they can sign up for Equal Pay on NW Natural’s website. From November, 2005, to May, 2006, this awareness level improved by over 40 percent – from 37.9% to 54.5%. (See Table 9.) While there was no difference in amount of television viewed daily between those knowing about signing up for Equal Pay on NW Natural’s website and those who did not know, a significantly higher number of those who knew about the website also used television as their primary source of news and information (44.6% vs. 28.9%). Interestingly, there was no particular difference between those aware of the web site and those unaware in terms of amount of Internet use.

Table 9.

Did you know you can sign up for Equal Pay on NW Natural's Web Site?	Nov. '05 n=198 (100.0%)	May '06 n=300 (100.0%)
No, did not know	61.6%	44.7%
Yes, knew this	37.9%	54.5%
Refused	0.5%	0.8%

Current Equal Pay Users.

When those who were aware of Equal Pay were asked whether they used this process to pay their bills, seven-of-ten (72.2%) said they did. Of the entire survey population (n=300), this number is about 60 percent. This means that NW Natural has about 40 percent of customers who are unaware of Equal Pay or, if aware, do not currently use the program. (See Table 10.)

Those using Equal pay tend to watch more television daily over those not using Equal Pay, with significantly more citing television as their primary source of news and information (44.7%, aware of Equal Pay vs. 34.6% not aware of Equal Pay). There was no difference in the frequency of Internet use between users and non-users.

Table 10.

Do you currently pay your bill with Equal Pay?	May '06 n=255 (100.0%)
No, do not pay bill this way	29.8%
Yes, currently use Equal Pay	70.2%

When asked why they did not take advantage of the Equal Pay program, as shown in Table 11, those not using Equal Pay (but who knew about the program) fell into four main groups:

- Those who like paying monthly, either preferring to get a low bill in the summer or just seeing no advantage in the program for them;
- Those who didn't like the idea of the program, who didn't trust the program to be equitable or cost-efficient, or who wanted to control their gas use by seeing costs each month;
- Those who haven't thought about joining the program or just haven't gotten around to joining the program; and
- Those who didn't qualify for the program.

While it's apparent that some customers may never select Equal Pay as a payment option, there are others who may, with proper messaging, make the shift. For example, those who want to see their actual monthly gas use and bill amount simply need to be educated to the fact that their bill will show this information while equalizing their actual payment amount. Messages that emphasize advantages of the program in terms of convenient, consistent payments rather than emphasizing smoothing cost peaks and valleys may build a level of need among those who do not find higher winter bills a financial burden.

Other areas might require an internal change. For example, those who do not have the twelve months of billing/usage information required to qualify for Equal Pay that live in a home with a usage history might be able to apply this history to Equal Pay billing - even though the history was created by another customer.

Table 11.

Why don't you take advantage of Equal pay?	May. '06 n=179 (100.0%)
Like paying exact amount monthly	45.2%
See no advantage/Don't need to use	14.5%
Like to pay as I go/Like to pay monthly	17.3%
Like having low bills in summer	8.9%
Have no problem with fluctuating amounts	4.5%
Don't like/trust program	24.6%
Want control over use/Want to see variations	9.5%
Don't want it/Dislike Equal Pay program	8.4%
Causes higher bills/NWN benefits over me	4.5%
Don't like gas/Problems in the past	2.2%
Haven't thought about/Gotten around to it	14.5%
Haven't thought about it/Don't know	8.4%
Thinking about it/Haven't gotten around to it	6.1%
Don't qualify for program	13.4%
Haven't lived in home long enough	7.8%
Low gas use/Use doesn't justify	5.6%
Other	2.2%

Conclusions

Overall, the winter advertising campaign lifted awareness of NW Natural’s Equal Pay and web tools among its customer base. While newspaper ads did not score high recall levels, it appears that the mixed media package using television, print ads and bill inserts work well to get messages across. Adding to the mix, the Company benefits from the high Internet use in its market territory as many found the information they sought on the NW Natural website.

Looking at the specific Equal Pay and Web Tool television ads, both showed as good vehicles to lift awareness of NW Natural’s website as a place to find tips and information and to also sign up for Equal Pay.

Paperless billing and Equal Pay information placed in customer bills, matching actual bills with billing information, did a good job of making people aware of these issues and routing them to the NW Natural website to sign up or for more information. In general, people seemed to already know about the Equal Pay option; the growth in this area lay in the fact that the NW Natural website was a sign-up vehicle.

Asking people why they did not use Equal Pay provided messaging alternatives to better target those who have not found the option something they really need.

Given the heterogeneity of NW Natural’s customer base, there is still have ground to gain as far as getting the information out. Newspaper ads did not score as highly in specific recall, but seemed to have some impact when used in combination with other media. While NW Natural’s customers generally are frequent users of the Internet (almost three-fourths – 73.7% use the Internet weekly or more, slightly less than one-in-five respondents have no access to the Internet and must be approached in alternative ways – or have alternate ways to get the information about their billing options. Table 12 illustrates the differences in media information sources between those with and without Internet access.

Table 12.

What is your primary source of news and information?	Non Internet n=53 (100.0%)	Internet Users n=300 (100.0%)	Total n=300 (100.0%)
Television	50.9%	37.2%	39.7%
Newspaper	26.4%	23.5%	24.0%
More than one source/A mix	13.2%	14.6%	14.3%
Internet	0.0%	13.8%	11.3%
Radio	5.7%	9.7%	9.0%
Word of mouth/Other people	0.0%	0.4%	0.3%
None - No news source	1.9%	0.0%	0.3%
Other	0.0%	0.4%	0.3%
Don't know	1.9%	0.4%	0.7%

APPENDIX A:

Pre-Television Ad Survey

Post-Television Ad Survey

NATURAL GAS TELEVISION ADS – PRE-AIR SURVEY

Hello, my name is _____ with Consumer Opinion Services calling on behalf of NW Natural. NW Natural is committed to providing information for its customers concerning the services they offer and would like your opinions concerning several service options. Your participation in this brief, confidential survey would be greatly appreciated.

Screen out: Under 18's; those working in PR, marketing, marketing research, advertising, or for a public utility.

Q1. In the past year, have you seen or heard advertising about services offered by NW Natural?

- 1 Yes **(GO TO Q1a)**
- 2 Maybe, I'm not sure **(GO TO Q1a)**
- 3 No **(GO TO Q2)**
- 97 Don't know **(GO TO Q2)**

Q1a. What did the advertising say? **(DO NOT READ)**

- | | |
|-------------------------------|----------------------------------|
| 1 Natural gas safety | 7 Bill payment options |
| 2 Rate increase | 8 Call before you dig |
| 3 Ways to use gas efficiently | 9 Evaluate your gas bill |
| 4 Efficient equipment | 10 Gas is better/safe/clean/warm |
| 5 Selling new equipment | 11 Equipment safety inspection |
| 6 Internet tools | 12 Other (specify_____) |
| | 13 Don't know / Don't remember |

Q1b. Where did you see or hear that information? **(Multiple / DO NOT READ OR PROBE)**

- | | |
|------------------------|----------------------------------|
| 1 TV news | 8 Included in gas bill |
| 2 TV commercial | 9 Gas company brochure / handout |
| 3 Newspaper article | 10 Gas company employees |
| 4 Newspaper ad | 11 Friends or family |
| 5 Radio news | 12 Gas dealer or distributor |
| 6 Radio ad | 13 Other (specify_____) |
| 7 NW Natural's Website | 14 Don't know / Don't remember |

Q2. Are you aware that you can get energy-saving tips and information at NW Natural's Internet web site?

- 1 Yes **(GO TO Q2a)**
- 2 No **(GO TO Q3)**

Q2a. How did you find out about the energy-saving tips and information on NW Natural's web site? **(DO NOT READ)**

- | | |
|---------------------------------|---------------------------------|
| 1 TV commercial | 6 Gas company employees |
| 2 Newspaper ad | 7 Friends or family |
| 3 NW Natural brochure / handout | 8 Gas dealer or distributor |
| 4 Insert in bill | 9 Cruising NW Natural's website |
| 5 Radio ad | 10 Other (specify_____) |
| | 11 Don't know / Don't remember |

Q3. Are you aware that NW Natural offers Equal Pay, a plan which spreads the amount you owe into even payments over the course of a year?

- 1 Yes **(GO TO Q3a)**
- 2 No **(GO TO QD1)**

Q3a. How did you find out NW Natural offered Equal Pay? **(DO NOT READ)**

- 1 TV commercial
- 2 Newspaper ad
- 3 NW Natural brochure / handout
- 4 Insert in bill
- 5 Radio ad
- 6 Gas company employees
- 7 Friends or family
- 8 Gas dealer or distributor
- 9 Cruising NW Natural's website
- 10 Other (specify_____)
- 11 Don't know / Don't remember

Q3b. Did you know that you can sign up for Equal Pay on NW Natural's web site?

(DO NOT READ)

- 1 Yes
- 2 No
- 3 Refused

For classification purposes, could you tell me. . .

D1. On an average day & evening, how frequently would you say you watch television? **(READ)**

- 1 Never watch
- 2 Less than 1 hour
- 3 1 – 2 hours
- 4 2 – 3 hours
- 5 3- 5 hours
- 6 Over 5 hours
- 7 Don't know **(DO NOT READ)**
- 8 Refused **(DO NOT READ)**

D2. What is your PRIMARY source of news and information? **(DO NOT READ)**

- 1 Internet
- 2 Magazines
- 3 Mail
- 4 Newspaper
- 5 Radio
- 6 Television
- 7 Word of mouth / Other people
- 8 More than one response / Mixture
- 9 None / No news source
- 10 Other (specify: _____)
- 11 Don't know / Not sure
- 12 Refused

D3. How frequently do you use the Internet? Would you say you use it. . . **(READ)**

- 1 Every day
- 2 Several times a week
- 3 Once a week
- 4 Several times a month
- 5 Once a month
- 6 Several times a year
- 7 Less than once a year
- 8 Never (Do not own or have access)
- 9 Don't know **(DO NOT READ)**
- 10 Refused **(DO NOT READ)**

**This concludes our survey. Thank you very much for your time and opinions.
Have a wonderful evening!**

Record gender: 1 Male 2 Female

NATURAL GAS TELEVISION ADS – POST-AIR SURVEY

Hello, my name is _____ with Consumer Opinion Services calling on behalf of NW Natural. NW Natural is committed to providing information for its customers concerning the services they offer and would like your opinions concerning several service options. Your participation in this brief, confidential survey would be greatly appreciated.

Screen out: Under 18's; those working in PR, marketing, marketing research, advertising, or for a public utility.

Q1. In the past year, have you seen or heard advertising about services offered by NW Natural?

- 1 Yes **(GO TO Q1a)**
- 2 Maybe, I'm not sure **(GO TO Q1a)**
- 3 No **(GO TO Q2)**
- 97 Don't know **(GO TO Q2)**

Q1a. What did the advertising say? **(MULTIPLE RESPONSES - DO NOT READ OR PROBE)**

- | | |
|-------------------------------|----------------------------------|
| 1 Natural gas safety | 7 Bill payment options |
| 2 Rate increase | 8 Call before you dig |
| 3 Ways to use gas efficiently | 9 Evaluate your gas bill |
| 4 Efficient equipment | 10 Gas is better/safe/clean/warm |
| 5 Selling new equipment | 11 Equipment safety inspection |
| 6 Internet tools | 12 Other (<i>specify</i> _____) |
| | 97 Don't know / Don't remember |

Q1b. Where did you see or hear that information? **(MULTIPLE RESPONSES / DO NOT READ OR PROBE)**

- | | |
|------------------------|----------------------------------|
| 1 TV news | 8 Included in gas bill |
| 2 TV commercial | 9 Gas company brochure / handout |
| 3 Newspaper article | 10 Gas company employees |
| 4 Newspaper ad | 11 Friends or family |
| 5 Radio news | 12 Gas dealer or distributor |
| 6 Radio ad | 13 Other (<i>specify</i> _____) |
| 7 NW Natural's Website | 97 Don't know / Don't remember |

Q2. Are you aware that you can get energy-saving tips and information at NW Natural's Internet web site?

- 1 Yes **(GO TO Q2a)**
- 2 No **(GO TO Q3)**

Q2a. How did you find out about the energy-saving tips and information on NW Natural's web site? **(MULTIPLE RESPONSES - DO NOT READ OR PROBE)**

- | | |
|---------------------------------|----------------------------------|
| 1 TV commercial | 7 Friends or family |
| 2 Newspaper ad | 8 Gas dealer or distributor |
| 3 NW Natural brochure / handout | 9 Cruising NW Natural's website |
| 4 Insert in bill | 10 Common knowledge/Had forever |
| 5 Radio ad | 11 Other (<i>specify</i> _____) |
| 6 Gas company employees | 97 Don't know / Don't remember |

Q3. Are you aware that NW Natural offers paperless billing on their web site?

- 1 Yes **(GO TO Q3a)**
- 2 No **(GO TO Q4)**

Q3a. How did you find out about paperless billing being on NW Natural's web site?

- | | |
|---------------------------------|----------------------------------|
| 1 TV commercial | 7 Friends or family |
| 2 Newspaper ad | 8 Gas dealer or distributor |
| 3 NW Natural brochure / handout | 9 Cruising NW Natural's website |
| 4 Insert in bill | 10 Common knowledge/Had forever |
| 5 Radio ad | 11 Other (<i>specify</i> _____) |
| 6 Gas company employees | 97 Don't know / Don't remember |

Q4. Are you aware that NW Natural offers Equal Pay, a plan which spreads the amount you owe into even payments over the course of a year?

- 1 Yes **(GO TO Q4a)**
- 2 No **(GO TO D1)**

Q4a. How did you find out NW Natural offered Equal Pay? **(DO NOT READ)**

- | | |
|---------------------------------|----------------------------------|
| 1 TV commercial | 7 Friends or family |
| 2 Newspaper ad | 8 Gas dealer or distributor |
| 3 NW Natural brochure / handout | 9 Cruising NW Natural's website |
| 4 Insert in bill | 10 Common knowledge/Had forever |
| 5 Radio ad | 11 Other (<i>specify</i> _____) |
| 6 Gas company employees | 97 Don't know / Don't remember |

Q4b. Did you know that you can sign up for Equal Pay on NW Natural's web site?
(DO NOT READ)

- 1 Yes
- 2 No
- 3 Refused

Q4c. Do you currently pay your bill using NW Natural's Equal Pay plan?

- 1 Yes **(GO TO D1)**
- 2 No **(GO TO Q4d)**

Q4d. Why don't you take advantage of Equal Pay? **(SINGLE RESPONSE ONLY/DO NOT PROBE)**

For classification purposes, could you tell me. . .

D1. On an average day & evening, how frequently would you say you watch television? **(READ)**

- | | | |
|--------------------|----------------|-----------------------------------|
| 1 Never watch | 4 2 – 3 hours | 7 Don't know (DO NOT READ) |
| 2 Less than 1 hour | 5 3- 5 hours | |
| 3 1 – 2 hours | 6 Over 5 hours | 9 Refused (DO NOT READ) |

D2. What is your PRIMARY source of news and information? **(DO NOT READ)**

- | | |
|--------------|------------------------------------|
| 1 Internet | 7 Word of mouth / Other people |
| 2 Magazines | 8 More than one response / Mixture |
| 3 Mail | 9 None / No news source |
| 4 Newspaper | 10 Other (<i>specify: _____</i>) |
| 5 Radio | 97 Don't know / Not sure |
| 6 Television | 99 Refused |

D3. How frequently do you use the Internet? Would you say you use it. . . **(READ)**

- | | |
|--------------------------|--------------------------------------|
| 10 Every day | 15 Several times a year |
| 11 Several times a week | 16 Less than once a year |
| 12 Once a week | 17 Never (Do not own or have access) |
| 13 Several times a month | 97 Don't know (DO NOT READ) |
| 14 Once a month | 99 Refused (DO NOT READ) |

**This concludes our survey. Thank you very much for your time and opinions.
Have a wonderful evening!**

Record gender: 1 Male 2 Female