Overview

- Customer research sources

- Brand awareness

- Customer priorities

- Next steps

Sources of Customer Understanding

- Annual perception survey

- Feedback from community workshops

- Focus groups

- Other online surveys

Customer Verbatims

"I would love options to PG&E."

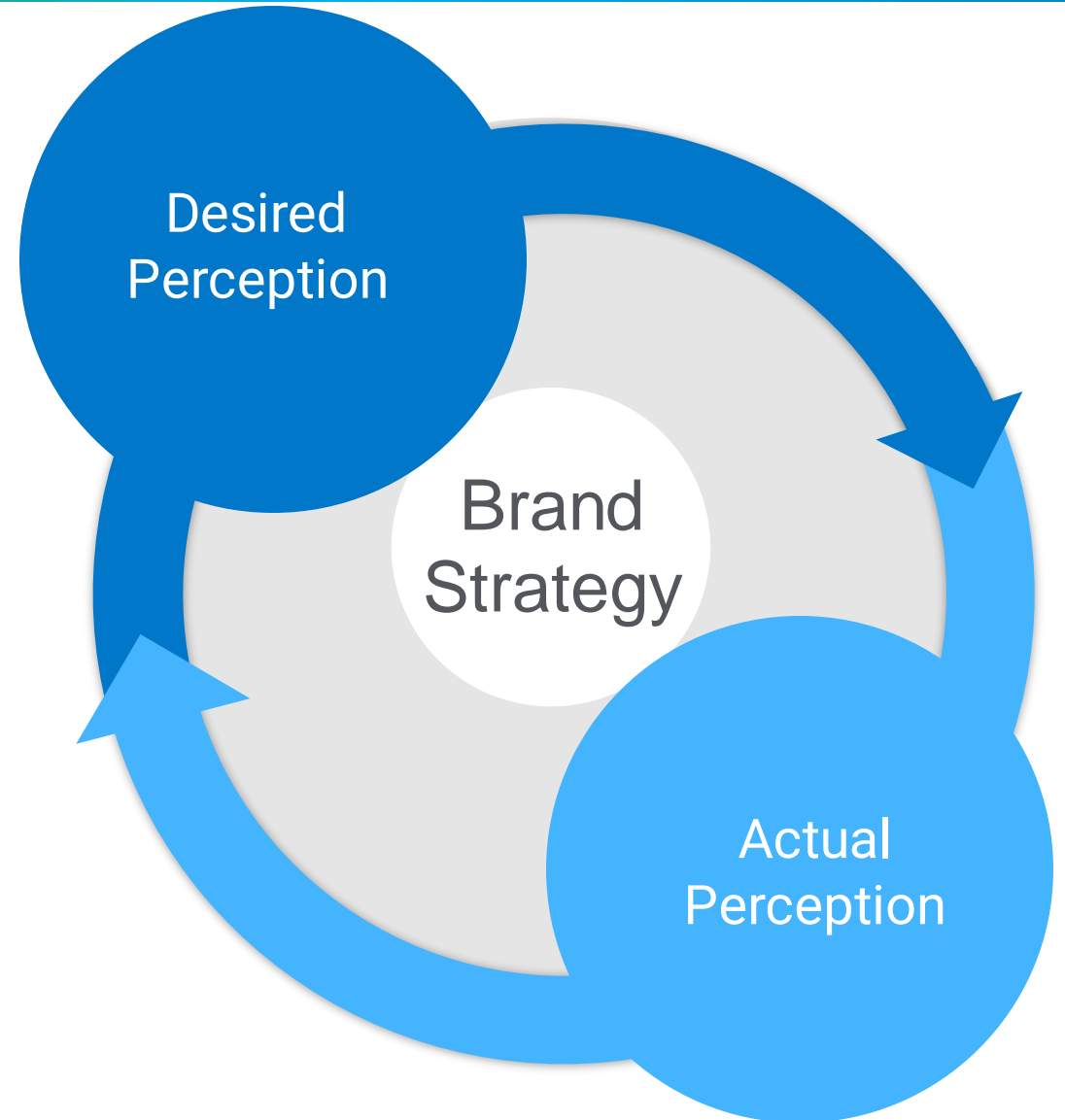*"I am not sure who you are and what you want"*

"You gave me a rebate… but I didn't realize you're also my electricity provider"

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Customer Verbatims

"I would love options to PG&E."

"I am not sure who you are and what you want"

"You gave me a rebate… but I didn't realize you're also my electricity provider"

Desired Perception

Brand Strategy

Actual Perception

Customer Verbatims

"I just want safe, inexpensive power."

"This year the price of gas and electricity has been unsustainable."

"I am interested in learning more about what we can do personally in our own home."

"I'm interested but won't change appliances until mine are in need of replacement..."

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Customer Verbatims

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"This year the price of gas and electricity has been unsustainable."

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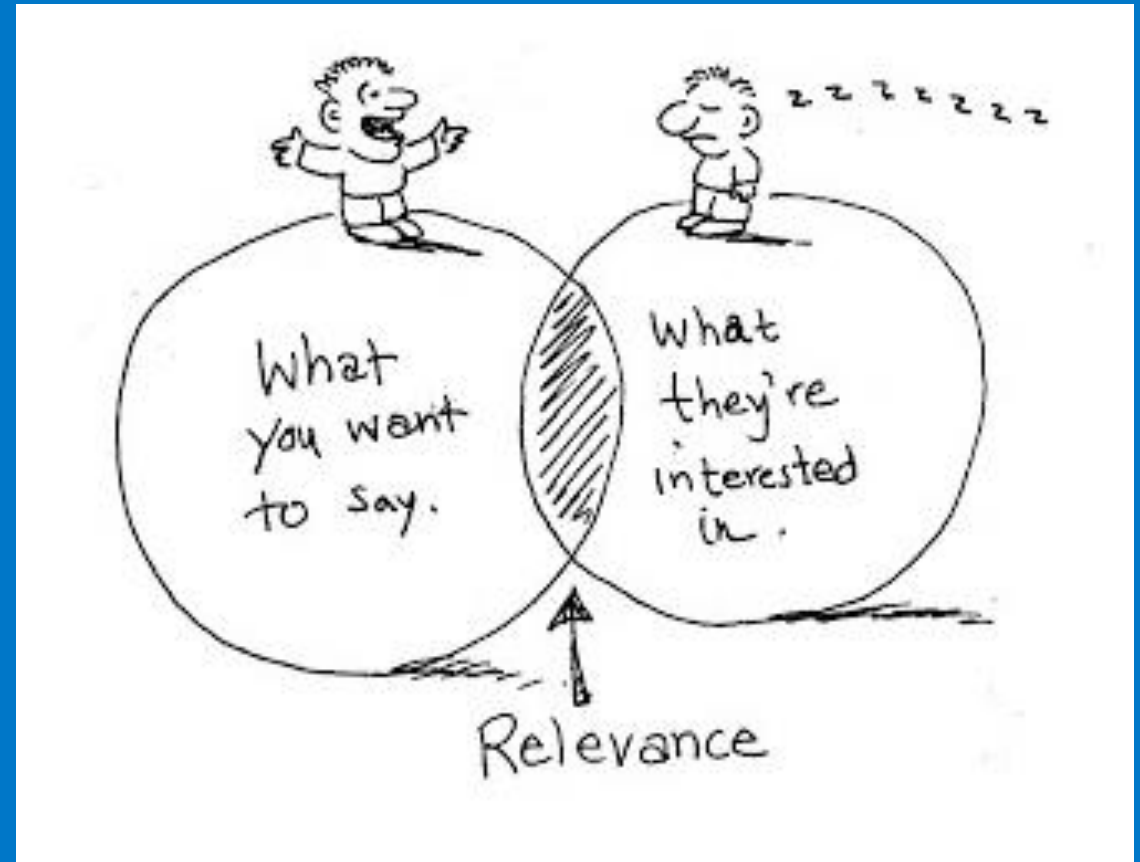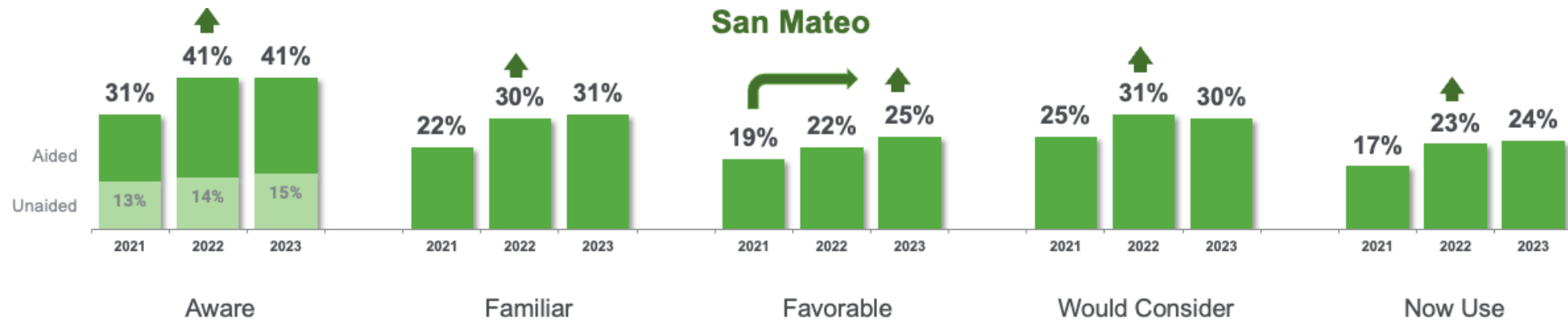*"I'm interested but won't change appliances until mine are in need of replacement..."*

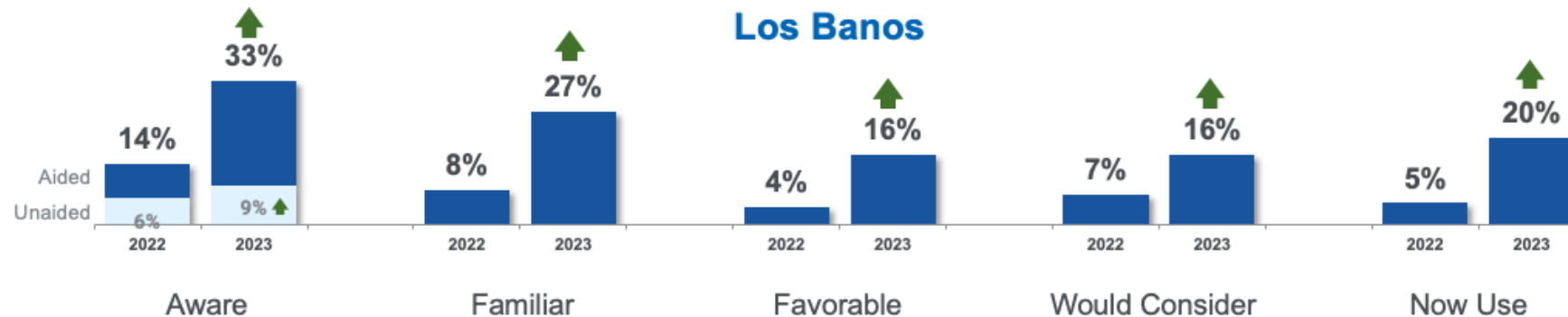We can build relationships through relevant content and context

Annual Perception Survey

Brand Results – Persuasion Monitor™

San Mateo: Metrics were stable/flat

San Mateo

	Aware	Familiar	Favorable	Would Consider	Now Use
2021	31% (Unaided 13%)	22%	19%	25%	17%
2022	41% (Unaided 14%)	30%	22%	31%	23%
2023	41% (Unaided 15%)	31%	25%	30%	24%

Los Banos: All metrics improved in 2nd year of service

Los Banos

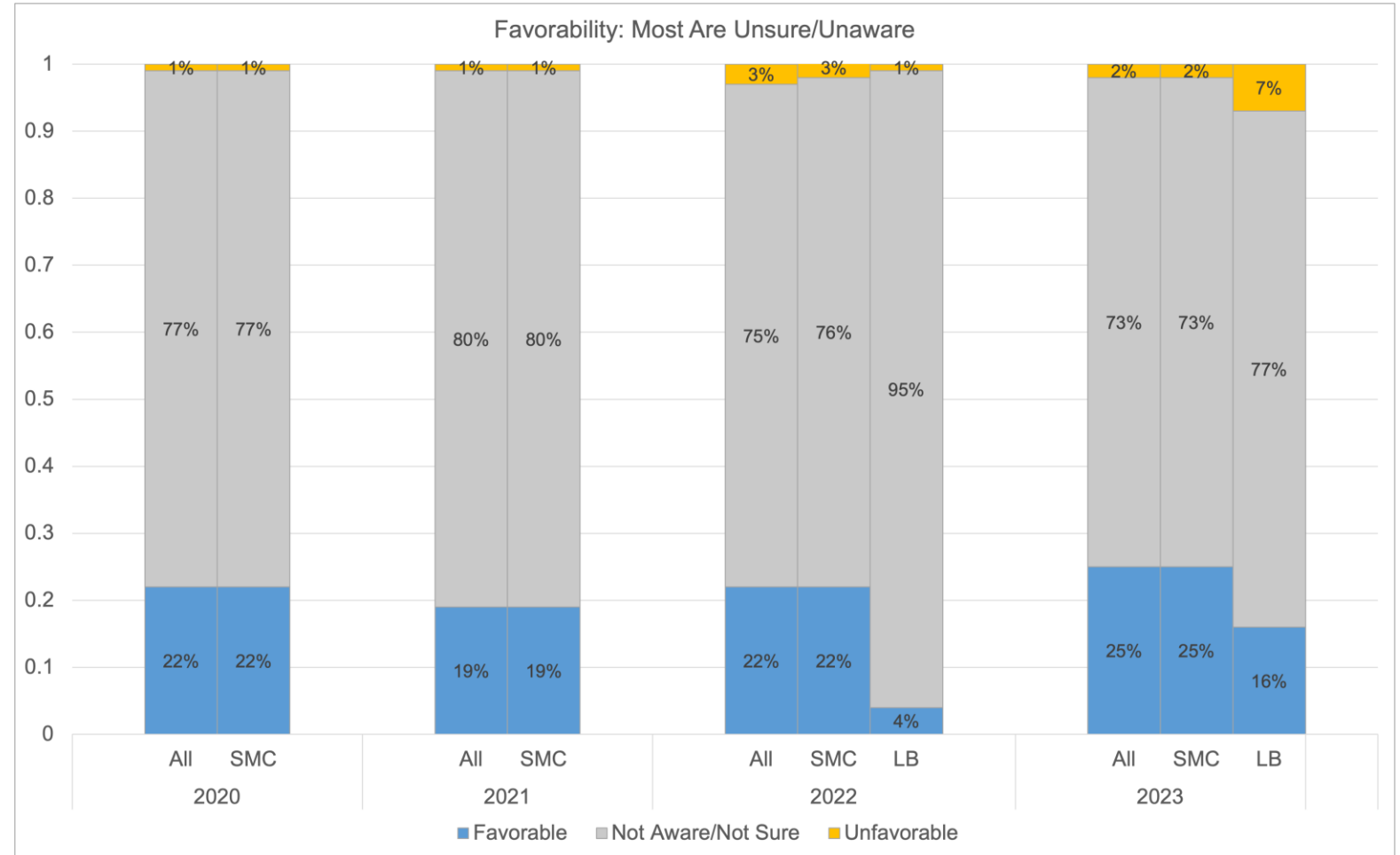|	Aware	Familiar	Favorable	Would Consider	Now Use
2022	14% (Unaided 6%)	8%	4%	7%	5%
2023	33% (Unaided 9%)	27%	16%	16%	20%

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A Closer Look at Favorability

Most are unaware or unsure.

Where people are unfavorable, they tend to have higher rate of misperceptions:

1) They think we charge a higher rate than PG&E
2) They thinks we are a branch of PG&E
3) They thinks we are for-profit

Favorability: Most Are Unsure/Unaware

Resident Priorities

San Mateo | Los Banos

Priorities

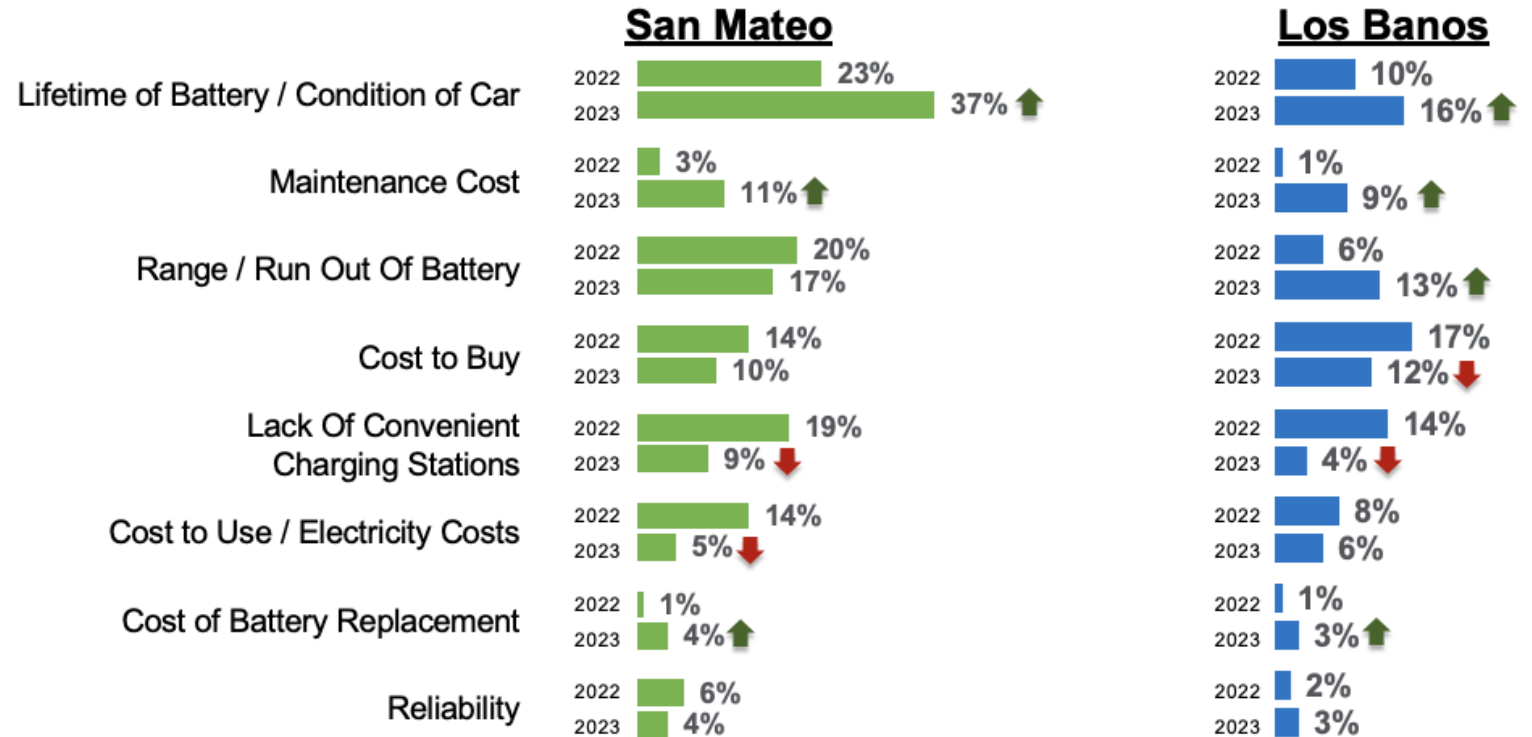|	San Mateo		Los Banos	
Lower electric rates	11% 13% 49% **73%**	11% 14% 55% **79%** ⬆	10% 17% 60% **87%**	8% 15% 64% **86%**
Cleaner energy sources	16% 20% 15% **51%**	17% 18% 12% **46%** ⬇	16% 17% 9% **42%**	12% 13% 5% **30%** ⬇
Offers programs that benefit the environment (or to help you be "greener")	16% 11% 8% **35%**	14% 12% 6% **32%** ⬇	15% 11% 9% **35%**	14% 12% 8% **34%**
Invests in renewable energy generation	15% 17% 10% **42%**	17% 13% 8% **39%**	11% 8% **21%**	11% 8% **21%**
Offers solar + storage solutions to provide electricity during power shutoffs	16% 18% 10% **44%**	15% 21% 12% **47%**	15% 20% 10% **45%**	17% 20% 10% **47%**
Local jobs and economic activity	6% 6% 2% **14%**	8% 7% 2% **17%**	12% 14% 6% **33%**	16% 17% 6% **39%** ⬆
Offers programs that promote electric vehicles or EVs	11% 10% **24%** ⬆	8% 7% **18%** ⬇	6% 4% **11%**	6% 5% **13%**
Offers programs that promote converting household appliances from natural gas to electric	4% **10%**	5% **13%** ⬆	7% 5% **15%**	8% 6% **16%**

Ranked: 3rd ■2nd ■1st
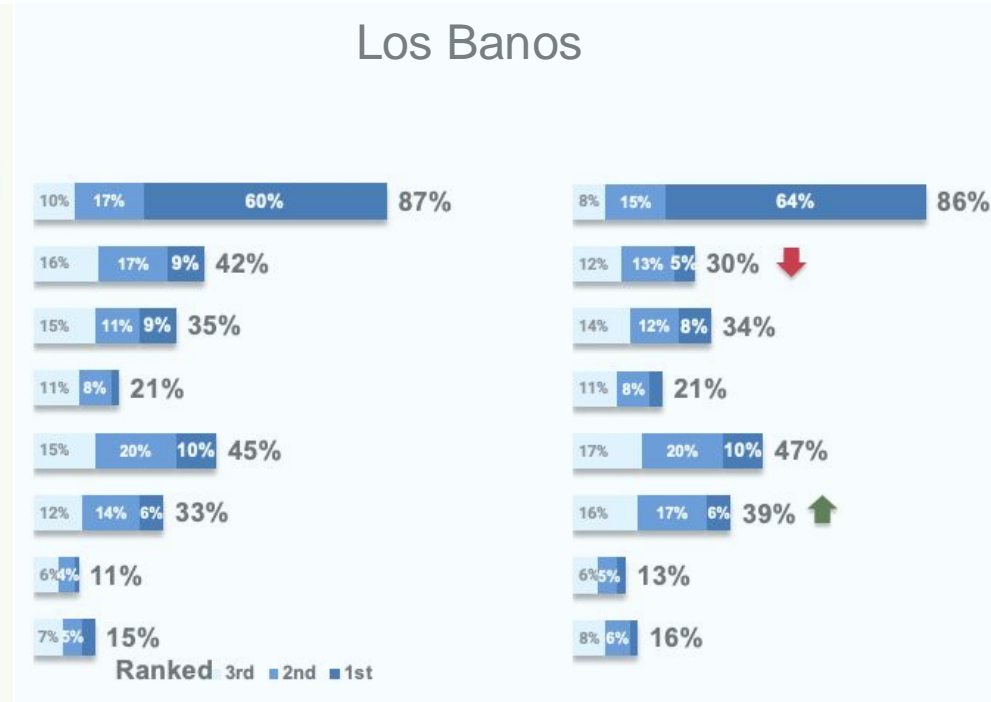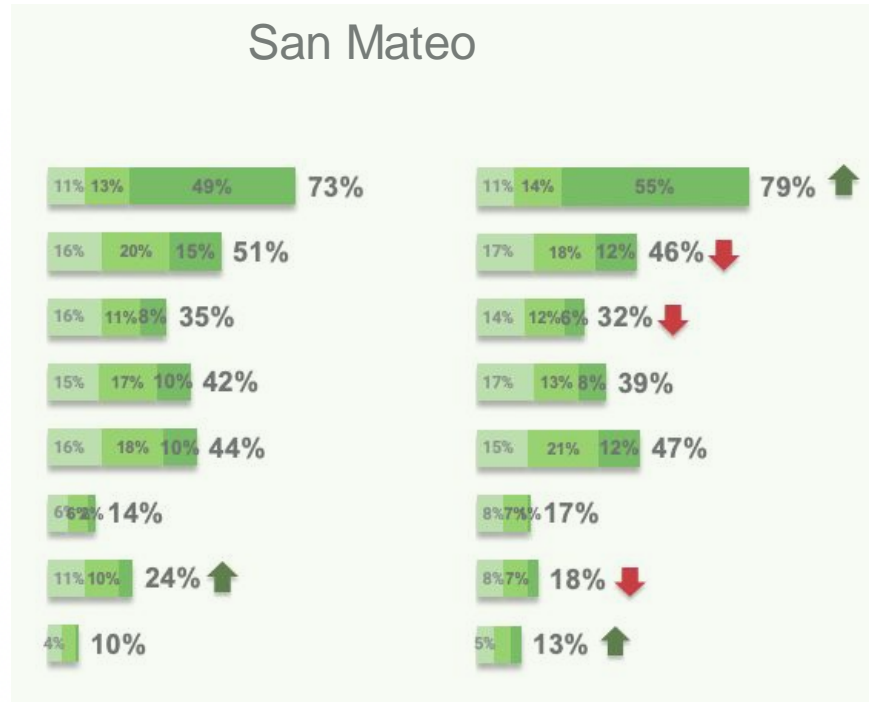
- Lower rates has increased in priority over the past few years
- Programs that improve reliability or control costs are gaining importance
- Programs aimed at environment or clean energy have declined in importance

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Attitudes About EVs

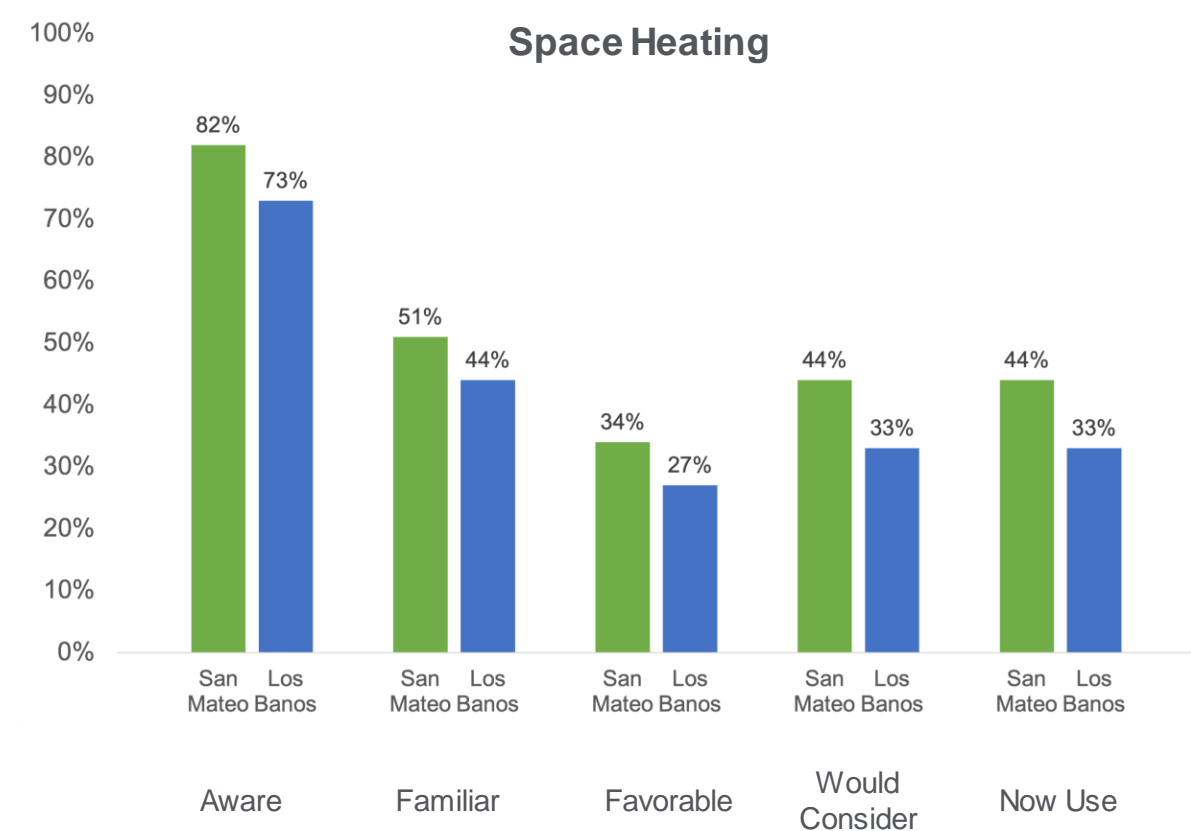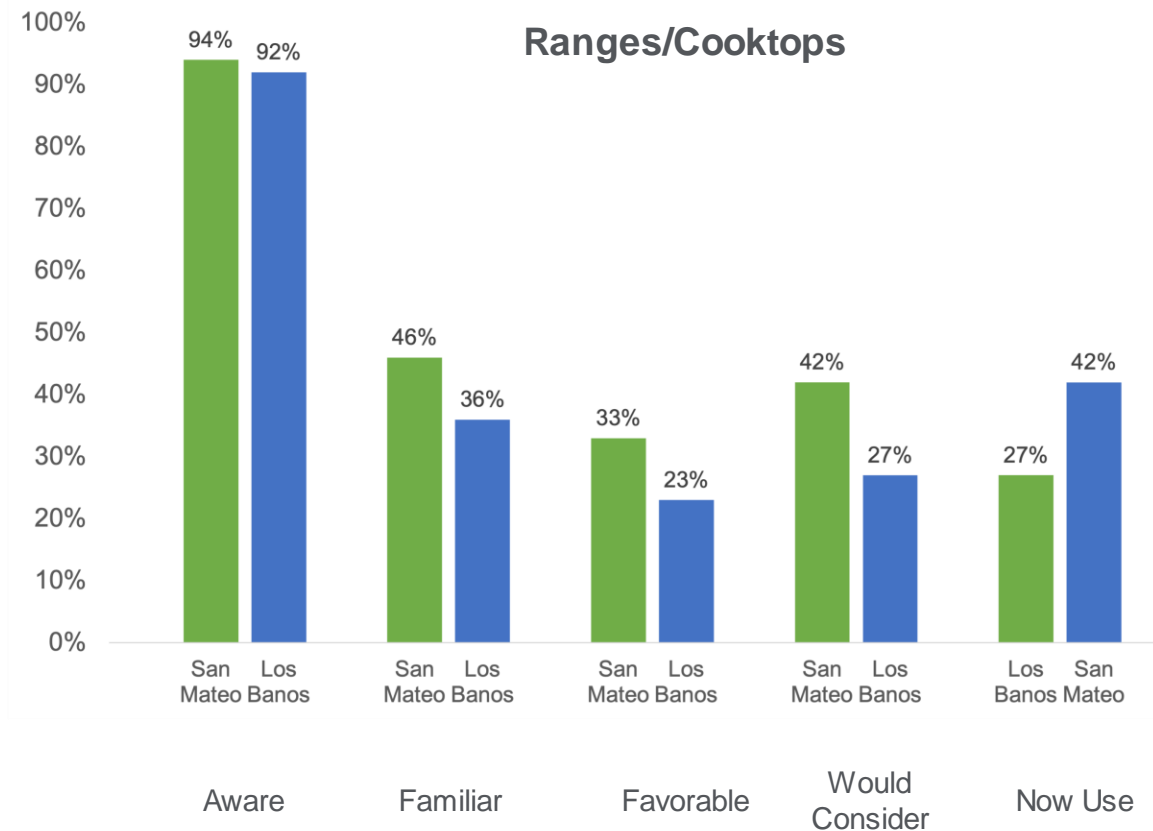|	Aware		Familiar		Favorable		Would Consider		Now Use	
	San Mateo	Los Banos	San Mateo	Los Banos	San Mateo	Los Banos	San Mateo	Los Banos	San Mateo	Los Banos
%	91%	62%	42%	23%	77%	58%	40%	23%	11%	1%

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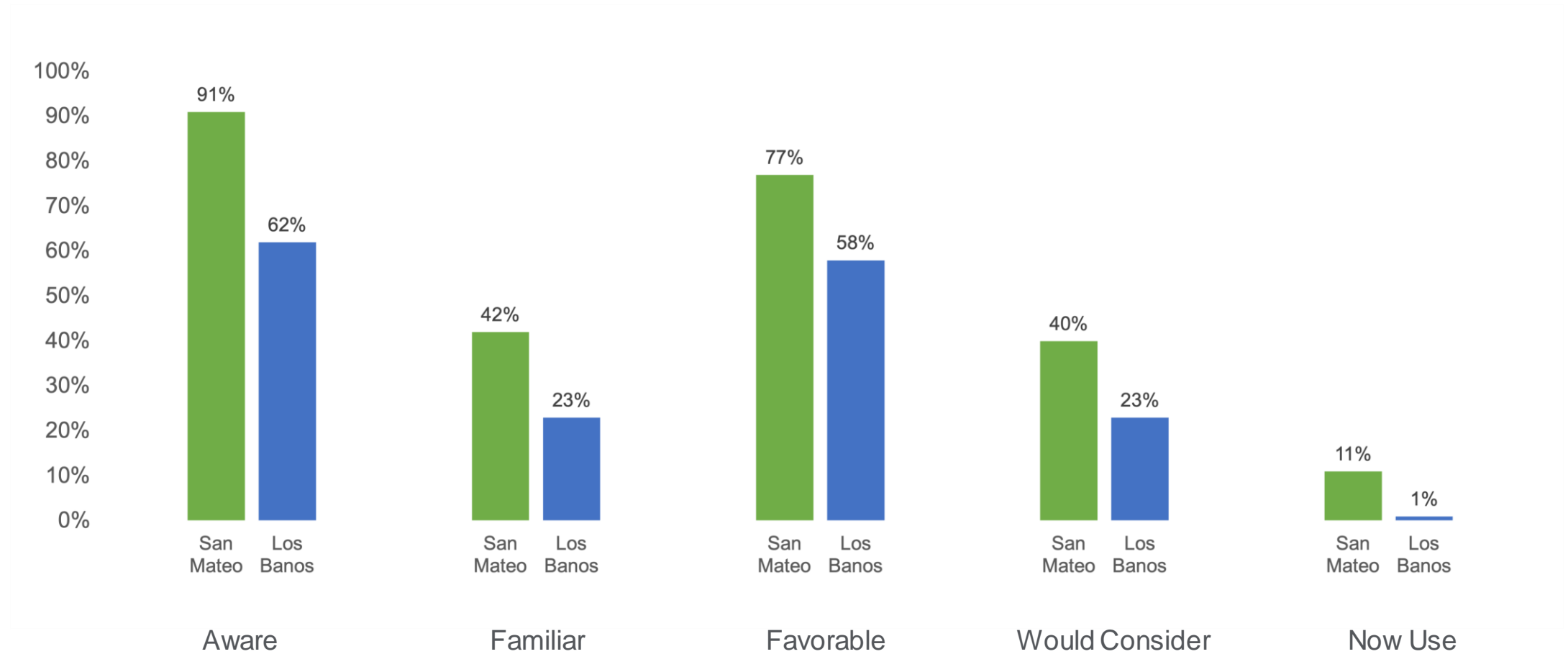
Used EV Barriers

- Battery life has significantly increased as a barrier

- Range is still an issue

- Maintenance cost concerns have increased.

- Concerns about a lack of charging stations has dropped significantly

San Mateo

Barrier	2022	2023
Lifetime of Battery / Condition of Car	23%	37% ⬆
Maintenance Cost	3%	11% ⬆
Range / Run Out Of Battery	20%	17%
Cost to Buy	14%	10%
Lack Of Convenient Charging Stations	19%	9% ⬇
Cost to Use / Electricity Costs	14%	5% ⬇
Cost of Battery Replacement	1%	4% ⬆
Reliability	6%	4%

Los Banos

Barrier	2022	2023
Lifetime of Battery / Condition of Car	10%	16% ⬆
Maintenance Cost	1%	9% ⬆
Range / Run Out Of Battery	6%	13% ⬆
Cost to Buy	17%	12% ⬇
Lack Of Convenient Charging Stations	14%	4% ⬇
Cost to Use / Electricity Costs	8%	6%
Cost of Battery Replacement	1%	3% ⬆
Reliability	2%	3%

Attitudes About Electric Appliances

- Persuasion metrics all increased from 2020 to 2023

Ranges/Cooktops

	Aware	Familiar	Favorable	Would Consider	Now Use
San Mateo	94%	46%	33%	42%	27%
Los Banos	92%	36%	23%	27%	42%

Space Heating

	Aware	Familiar	Favorable	Would Consider	Now Use
San Mateo	82%	51%	34%	44%	44%
Los Banos	73%	44%	27%	33%	33%

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Natural Gas vs Electric Appliances

- Electric seen as better for indoor air quality, safety, environmental benefits, carbon footprint
- Gas appliances are seen as better for cooking
- Residents are divided on which is best in efficiency, operating and upfront costs

Electric vs Gas

	2023 San Mateo				2023 Los Banos			
	Electric	Natural Gas	Neither	Not Sure	Electric	Natural Gas	Neither	Not Sure
Better for indoor air quality	73%	3%	6%	18%	57%	7%	7%	29%
Safer	60%	4%	12%	24%	48%	9%	9%	34%
Greater environmental benefits	60%	5%	9%	26%	47%	9%	9%	35%
Reduces my household's carbon footprint	61%	5%	8%	25%	43%	7%	10%	40%
Greater operating efficiency	35%	21%	6%	38%	29%	25%	4%	42%
Lower operation cost/fuel cost	32%	25%	8%	36%	31%	24%	7%	37%
Works better for heating your water	25%	34%	5%	36%	19%	46%	4%	32%
Lower purchase cost/less expensive	20%	27%	9%	44%	28%	24%	8%	39%
Works better for heating your home	23%	37%	5%	35%	25%	38%	3%	33%
Uses a power source that contributes to climate change	21%	43%	7%	29%	27%	19%	10%	44%
Works better for cooking	19%	60%	6%	15%	15%	65%	2%	18%
Building codes may restrict their installation in new construction	9%	56%	4%	32%	9%	30%	8%	53%

Climate Change Attitudes

- Almost half of SMC residents (48%) believe their individual, household actions can have a meaningful impact but while (29%) would pay up to 10% more to purchase products that do so.

- Los Banos residents (39%) believe their individual, household actions can have a meaningful but fewer (24%) would pay up to 10% more to purchase products that do so.

Statement Agreement
(% 8-10, Mean)

	2022 San Mateo	2023 San Mateo	2022 Los Banos	2023 Los Banos
The actions I take in my home can have a meaningful impact on climate change	48%	48%	42%	39%
I am willing to pay up to 10% more to purchase products that mitigate climate	34%	29% ↓	21%	24%
I am willing to replace my vehicle and/or appliances before the end of their useful life to help mitigate my impacts on climate change	37%	35%	14%	18% ↑
I am not willing to pay anything more to purchase products that mitigate climate change	14%	19% ↑	24%	25%

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Climate Change Attitudes

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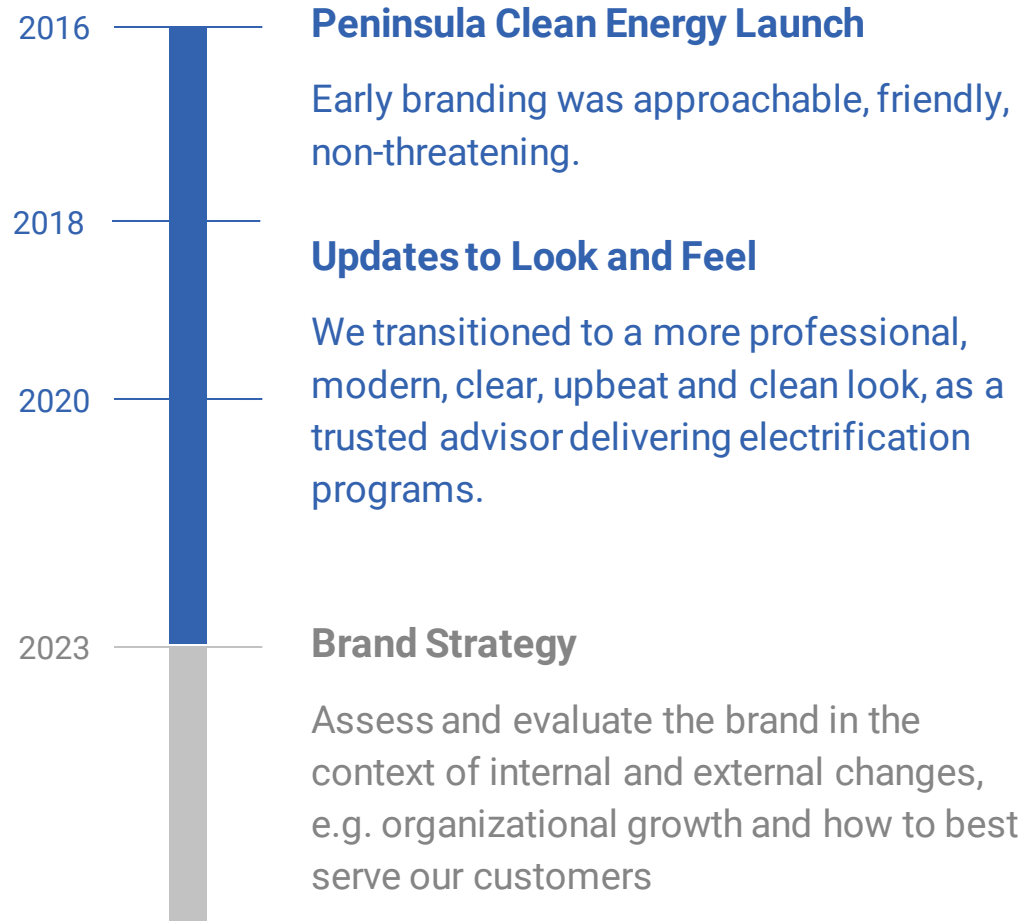
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I am not willing to pay anything more to purchase products that mitigate climate change	14%	19% ⬆	24%	25%

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Next Steps

Peninsula Clean Energy Brand Evaluation

2016

Peninsula Clean Energy Launch

Early branding was approachable, friendly, non-threatening.

2018

Updates to Look and Feel

We transitioned to a more professional, modern, clear, upbeat and clean look, as a trusted advisor delivering electrification programs.

2020

2023

Brand Strategy

Assess and evaluate the brand in the context of internal and external changes, e.g. organizational growth and how to best serve our customers

Brand audit
Q3 2023

↓

Marketing RFP
Q3 – Q4 2023

↓

Execution
Q1 - Q2 2024

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Thank you!

Appendix Slides

Approach (continued)

- **2,523 of 33,850 who were invited via US Mail responded (7.45% response rate)**

  o A random sample of all residences in each location (customers and non-customers) was selected to receive the invitations. This approach produces a probability sample, meaning every household in each location had an equal chance of being invited.

  o In San Mateo County, 1,721 of 23,150 who were invited via US Mail responded—a 7.43% response rate.

  o In Los Banos, 802 of 10,700 who were invited via US Mail responded—a 7.50% response rate.

- **The survey was offered in two languages. Completed surveys by language:**

  o Our count for surveys in English was 2,374 and 149 in Spanish. That was 54 in San Mateo County and 95 in Los Banos, which, for each region was 3.8% and 11.1% of completes, respectively (note that is a statistically significant difference between regions).

  o The invitation was printed in English on one side and Spanish on the other, and English and Spanish versions of the questionnaire program were available.

  o Note this year we also offered the links to the survey in Spanish on both the login page of the survey and the landing page of the survey. This likely accounts for our larger number of completes in Spanish this year.

  o While the dual-language invitation resulted in 149 in-language responses, thru weighting, the representation of self-identified Hispanics matches US Census proportions in both San Mateo (25%) and Los Banos (70%).

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Approach (continued)

- **A three-step weighting design was applied for each location:**
  - In past years, a first step was that non-customers were sampled down to reflect their population proportion
    - Starting in 2023, we sampled non-customers to their population proportions.
    - In future waves we will continue to sample non-customers to their population proportions, eliminating the need for this first step.
  - Second, weights were applied to reflect census-based demographics for each location's ethnicity proportions.
  - Third, responses were randomly sampled down (aka, removed) to achieve the known share of EVs per household in San Mateo County (15.1%) and Los Banos (3.3%).
  - The result is a weighted sample of 1,320 San Mateo County residents and 782 Los Banos residents.

Approach (continued)

- **The margin of error**
  - ○ **+/- 2.3% for the (unweighted) San Mateo sample of 1,721 at the 95% confidence level**
  - ○ **+/- 3.4% for the (unweighted) Los Banos sample of 802 at the 95% confidence level**

- **Surveys were completed between April 7 and May 8, 2023.**