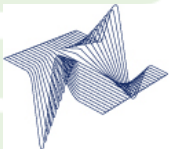




Peninsula Clean Energy Market Research Results

C/CAG RMCP Meeting
October 21, 2020



HINER & PARTNERS, INC.
MARKETING DIAGNOSTICS AND STRATEGIES



Objectives

Assess awareness and perception among San Mateo County residents of:

- Peninsula Clean Energy brand
- Benefits, obstacles to adoption, and purchase interest in Electric Vehicles

Approach

- Random sample of all households in San Mateo County
- Letter invitation from San Mateo County Office of Sustainability
- Response rate: 8.3%
- 19-minute self-administered online survey offered in multiple languages (English, Spanish, Mandarin, Tagalog)

Affiliation with OOS provided an opportunity to capture “unaided awareness” BUT likely introduced some degree of pro-environment bias into the sample

Approach (continued)

- Sample was “**normalized**” to better reflect population
- Resulting sample: **2,261 residents**
- The margin of error for a total sample of 2,261 at the **95% confidence level is +/- 2.0%** but is slightly higher for subgroups
- Surveys were completed **April 7 to April 29, 2020**

A low-angle, upward-looking photograph of a white wind turbine. The tower, nacelle, and parts of three blades are visible against a clear, bright blue sky. The perspective makes the tower appear to rise steeply from the bottom left towards the top center.

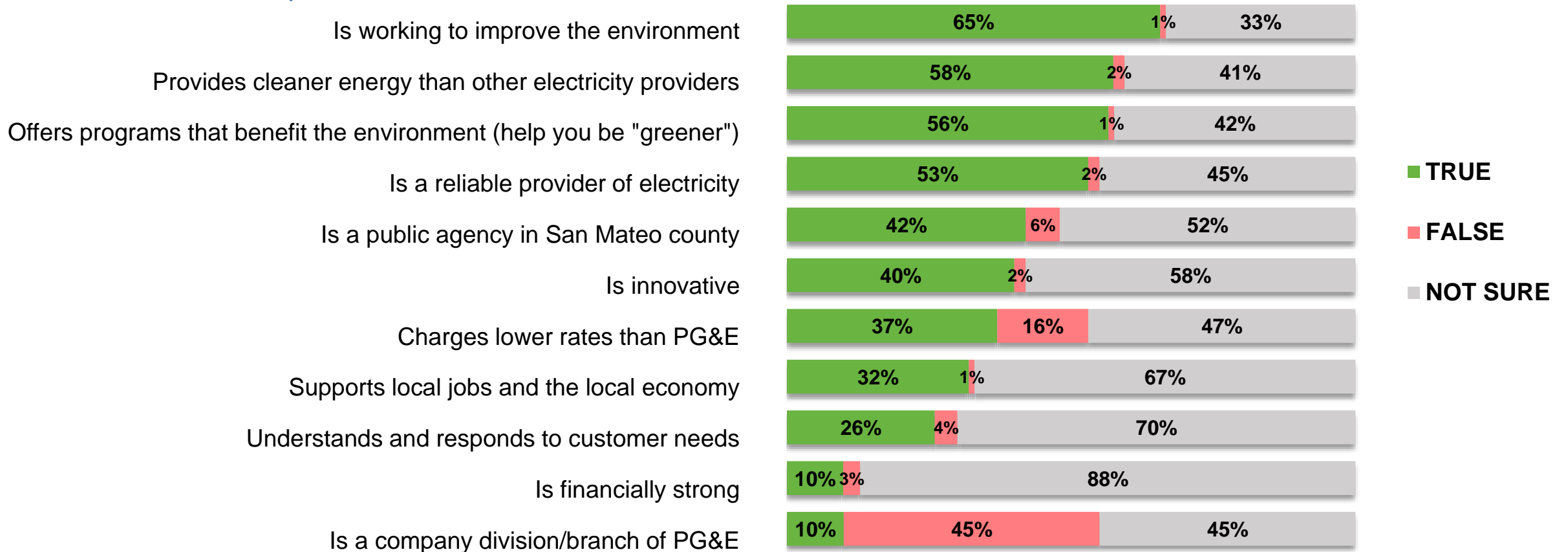
**Brand
Awareness,
Perception**

Brand Awareness, Perception

- 34% total awareness
 - Inclusive of 11% unaided
- Of those who are aware, 63% had a favorable perception
- Brand perceptions are fairly well-aligned with our mission and messaging
- Top priority for an “*electricity provider*” is lower rates; all other priorities far behind in importance
- 85% of respondents agree (58% strongly agree) with the statement: “I believe our community should prioritize efforts to do our part to reduce greenhouse gas emissions.”

Brand Perceptions

Our intended messages are getting across (among those who are aware)

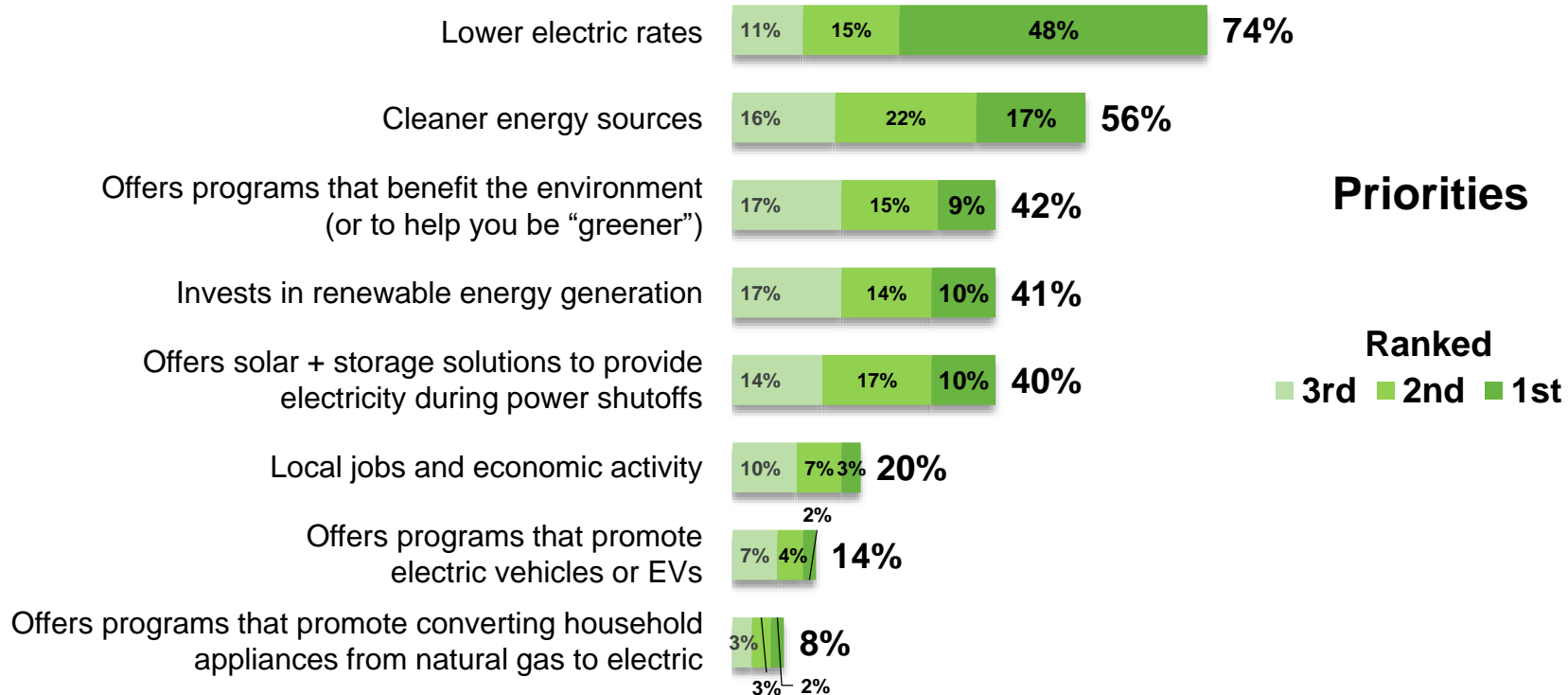


Q9 - For each statement, please indicate if you think it is true or false about Peninsula Clean Energy.
 Base: Aware of PCE (n=770)

Energy Provider Priorities

The highest priority for an electricity provider among all San Mateo County residents is lower electric rates

- Nearly half (48%) rank low rates as their #1 priority
- Just 17% rank cleaner sources #1, followed by renewable investment (10%), storage (10%) and environmental benefits (9%)



Q7a - If a provider of electricity to your home could offer all the advantages listed below, which three would be most important to you?

Base: Total Sample (n=2,261)

Implications

- Our brand awareness has plenty of upside for improvement
- Perceptions of Peninsula Clean Energy are favorable among those who are aware
- Improvement needed on the perception of lower cost electricity
- Opportunity to improve awareness and favorability among non-whites and renters

Electric Vehicles



EV Awareness, Perceptions

Objective:

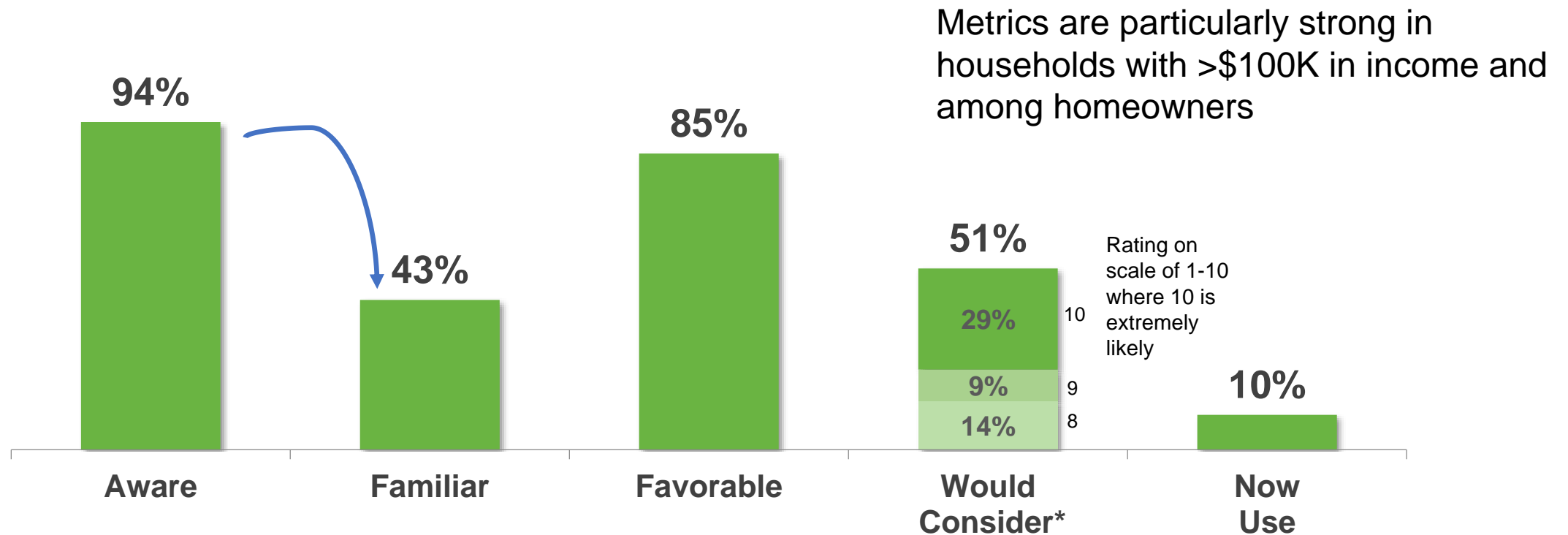
- Assess awareness and perception among San Mateo County residents about electric vehicles, including benefits, obstacles to adoption and purchase interest

Respondents:

- Survey questions on this topic were presented only to those respondents who were:
 - Licensed drivers and
 - Primary decision maker for vehicle purchases

Persuasion Monitor™ – EV / Plug-in Hybrid EV

Almost all respondents to the EV survey were aware of EVs and view them favorably. However, most rate themselves as lacking in familiarity. This dip indicates a need for more information, especially to address barriers to adoption.



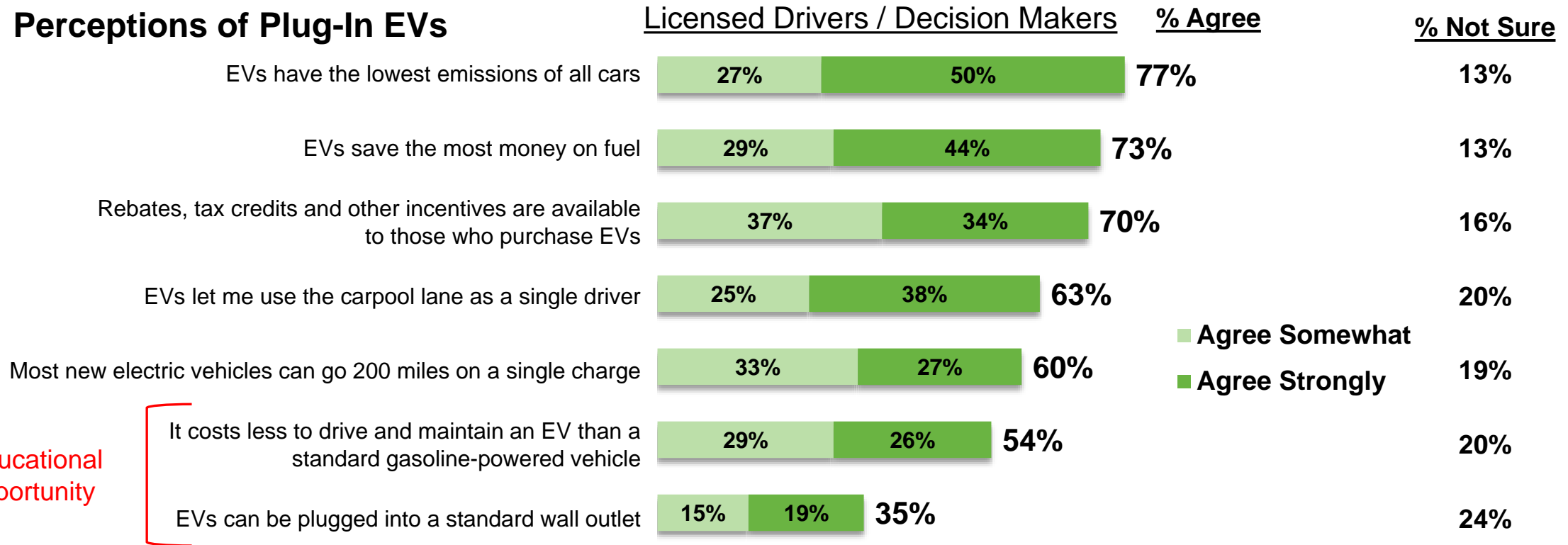
The base for this chart and all remaining slides in this section is Licensed Drivers who are Vehicle Decision-makers, not all SM County households.

* Would Consider includes those who would consider an HEV, the other metrics are for BEV and PHEV only.

Perceptions of EVs

High percentages of respondents agree with most factual statements about EVs but are less certain about total cost of ownership and ability to charge in a standard wall outlet.

Perceptions of Plug-In EVs

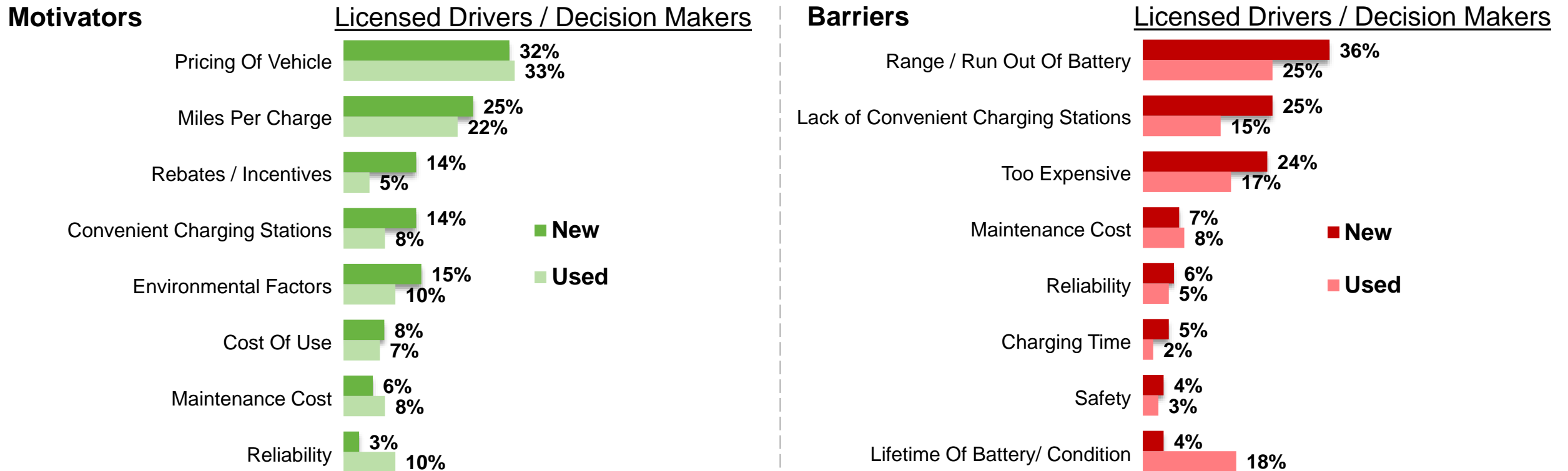


Educational opportunity

QEV3 - Please indicate your agreement with the following statements about plug-in electric vehicles (EVs).
 Base: Licensed Drivers and Decision Makers (n=1,777)

EV Motivators & Barriers

- Purchase price and miles per charge are motivating consideration.
- Fear of running out of battery and inability to charge are the biggest barriers, followed by purchase price.



QEV12 - If you were in the market for a NEW/USED vehicle, what are two or three things that might motivate you to consider getting an electric vehicle?
 QEV13 - If you were in the market for a NEW/USED vehicle, what are two or three things that might be a concern to you when considering an electric vehicle?
 Base: Expecting to buy/lease a new/used car (n=1,111 / 404)

Implications

- Residents are strongly aware of EVs and view them favorably
- Opportunities exist for education about operating costs and charging
- As of April 2020, 1 in 4 residents were considering buying a vehicle in the next year
- Opportunity to influence used vehicle buyers toward EVs

Implications

- Possible opportunity to add to consumer priorities by emphasizing the importance of **safety** and **reduced emissions** inside the home
- Widely held belief that natural gas works better for cooking presents a communications and education challenge especially among upper income households