Research Design:
- Systematic telephone survey
  - 508 residential consumers
  - 200 commercial consumers
- Random digit dial (RDD) probabilistic sample for residential households
  - Adult decision-maker
- Random probabilistic sample of businesses in Maryland with at least 10 employees
  - Business decision-maker

Purpose
- Evaluate the impact of advertising and media exposure on consumers’ awareness of electric power supplier competition in Maryland.
- Determine consumers’ knowledge of the electric power industry and the impact of deregulation.
- Measure consumers’ preferences for obtaining information on electric competition in Maryland.
- Evaluate changes in consumer perspectives, attitudes and media exposure over time.

Survey Administration
- CATI telephone interviews conducted September 9-20, 2002
- All interviews conducted by paid, trained and professionally supervised interviewers
What do you recall hearing or seeing in the news about the supply of electricity in the past 6 months?

[Among all respondents | TOTAL MENTIONED]

Source: RKM Research and Communications, Inc.
Chart 3 / MD PSC / 2002 Survey of Residential and Commercial Customers

How much have you heard about electric competition in Maryland?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
Chart 4 / MD PSC / 2002 Survey of Residential and Commercial Customers

Where did you hear about electric competition in Maryland?

[Among all respondents: compared over time | TOTAL MENTIONED]

Source: RKM Research and Communications, Inc.
View toward electric competition in Maryland?

[Among all respondents: compared over time]

**Residential Consumers**

- 1999: 15.6%
- 2000: 12.5%
- 2001: 21.9%
- 2002: 19.7%

**Commercial Consumers**

- 1999: 14.5%
- 2000: 15.1%
- 2001: 22.4%
- 2002: 24.0%

Source: RKM Research and Communications, Inc.
Have you seen any type of advertising about electric competition in Maryland?

[Among all respondents: compared over time]

**Residential Consumers - Percent "Yes"**

- 2000: 66.7%
- 2001: 46.8%
- 2002: 31.9%

**Commercial Consumers - Percent "Yes"**

- 2000: 80.5%
- 2001: 53.2%
- 2002: 46.5%

Source: RKM Research and Communications, Inc.
Have you heard any news stories about electric competition?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
Have you or family member received a consumer guide from MD PSC?

[Among all respondents: compared over time]

**Residential Consumers - Percent "Yes"**
- 2000: 8.9%
- 2001: 9.4%
- 2002: 6.7%

**Commercial Consumers - Percent "Yes"**
- 2000: 19.5%
- 2001: 10.4%
- 2002: 11.5%

*Source: RKM Research and Communications, Inc.*
Chart 9 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition website?

[Among Residential Consumers: compared over time]

Source: RKM Research and Communications, Inc.
Chart 10 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition website?

[Among Commercial Consumers: compared over time]

2001

- Yes: 25.9%
- No: 69.1%
- Unsure: 5.0%

2002

- Yes: 17.5%
- No: 79.0%
- Unsure: 3.5%

Source: RKM Research and Communications, Inc.
Chart 11 / MD PSC / 2002 Survey of Residential and Commercial Customers

Likely future use of electric competition website (if you wanted more information about electric competition)

[Among Residential Consumers: compared over time]

2001
- Definitely would: 28.3%
- Probably would: 29.7%
- Probably not: 13.3%
- Definitely not: 27.0%
- Unsure: 1.6%

2002
- Definitely would: 31.9%
- Probably would: 30.3%
- Probably not: 13.6%
- Definitely not: 20.5%
- Unsure: 3.7%

Source: RKM Research and Communications, Inc.
Likely future use of electric competition website

( ... if you wanted more information about electric competition)

[Among Commercial Consumers: compared over time]

Chart 12 / MD PSC / 2002 Survey of Residential and Commercial Customers

Source: RKM Research and Communications, Inc.
Chart 13 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition answer center?

[Among Residential Consumers: compared over time]

**2001**
- Yes: 18.5%
- No: 80.2%
- Unsure: 1.3%

**2002**
- Yes: 12.6%
- No: 84.8%
- Unsure: 2.6%

Source: RKM Research and Communications, Inc.
Chart 14 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition answer center?

[Among Commercial Consumers: compared over time]

2001

- Yes: 17.4%
- No: 80.1%
- Unsure: 2.5%

2002

- Yes: 6.0%
- No: 90.0%
- Unsure: 4.0%

Source: RKM Research and Communications, Inc.
Chart 15 / MD PSC / 2002 Survey of Residential and Commercial Customers

Likely future use of electric competition answer center  ( . . if you wanted more info about electric competition) ?

[Among Residential Consumers: compared over time]

2001

- Definitely would: 19.8%
- Probably would: 39.9%
- Probably not: 16.0%
- Unsure: 4.4%

2002

- Definitely would: 21.1%
- Probably would: 41.5%
- Probably not: 24.4%
- Unsure: 5.5%
- Definitely not: 7.5%

Source: RKM Research and Communications, Inc.
Likely future use of electric competition answer center (if you wanted more info about electric competition)?

[Among Commercial Consumers: compared over time]

Source: RKM Research and Communications, Inc.
If you wanted more information about electric competition, where would you look?

[Among Residential Consumers: compared over time | TOTAL MENTIONED]

Source: RKM Research and Communications, Inc.
If you wanted more information about electric competition, where would you look?

[Among Commercial Consumers: compared over time | TOTAL MENTIONED]

Source: RKM Research and Communications, Inc.
How well do you understand the current status of electric competition in Maryland?

[Among Residential Consumers: compared over time]

2001
- Very clear: 7.6%
- Somewhat clear: 37.7%
- Not clear: 49.3%
- Unsure: 5.4%

2002
- Very clear: 15.2%
- Somewhat clear: 26.6%
- Not clear: 48.2%
- Unsure: 10.0%

Source: RKM Research and Communications, Inc.
How well do you understand the current status of electric competition in Maryland?

[Among Commercial Consumers: compared over time]

2001

- Somewhat clear: 51.3%
- Very clear: 11.4%
- Unsure: 2.0%
- Not clear: 35.3%

2002

- Somewhat clear: 32.0%
- Very clear: 21.0%
- Unsure: 8.0%
- Not clear: 39.0%

Source: RKM Research and Communications, Inc.
Chart 21 / MD PSC / 2002 Survey of Residential and Commercial Customers

Interest in being able to choose an electric supplier?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
Status of electric competition in Maryland?

[Among all respondents]

**Residential Consumers**
- Transition period: 25.2%
- Fully competitive: 7.5%
- Full regulated: 15.6%
- Unsure: 51.7%

**Commercial Consumers**
- Transition period: 29.0%
- Fully competitive: 19.0%
- Full regulated: 11.5%
- Unsure: 40.5%

Source: RKM Research and Communications, Inc.
Chart 23 / MD PSC / 2002 Survey of Residential and Commercial Customers

Knowledge of the end of the standard service offer?

[Among all respondents]

Residential Consumers
- Very: 2.6%
- Somewhat knowledgeable: 22.8%
- Not very: 65.0%
- No answer: 9.6%

Commercial Consumers
- Very: 2.0%
- Somewhat knowledgeable: 20.0%
- Not very: 59.0%
- No answer: 19.0%

Source: RKM Research and Communications, Inc.
Best term to describe service available to consumers who do not choose a supplier?

[Among all respondents]

Source: RKM Research and Communications, Inc.
Importance of being kept informed about the status of electric competition over the next 3 years?

[Among all respondents]

Source: RKM Research and Communications, Inc.
Self-reported knowledge of electric industry?

[Among all respondents: compared over time]

**Residential Consumers**

<table>
<thead>
<tr>
<th>Year</th>
<th>Not very knowledgeable</th>
<th>Not very knowledgeable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>38.5%</td>
<td>16.3%</td>
</tr>
<tr>
<td>2000</td>
<td>36.6%</td>
<td>11.8%</td>
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<tr>
<td>2001</td>
<td>45.6%</td>
<td>7.7%</td>
</tr>
<tr>
<td>2002</td>
<td>43.1%</td>
<td>10.2%</td>
</tr>
</tbody>
</table>

**Commercial Consumers**

<table>
<thead>
<tr>
<th>Year</th>
<th>Not very knowledgeable</th>
<th>Very knowledgeable</th>
</tr>
</thead>
<tbody>
<tr>
<td>1999</td>
<td>36.0%</td>
<td>13.0%</td>
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<tr>
<td>2000</td>
<td>36.2%</td>
<td>26.3%</td>
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<tr>
<td>2001</td>
<td>38.8%</td>
<td>8.0%</td>
</tr>
<tr>
<td>2002</td>
<td>41.0%</td>
<td>5.5%</td>
</tr>
</tbody>
</table>

**Source:** RKM Research and Communications, Inc.
The cost to transmit electricity will continue to be regulated by the PSC?  (Correct Answer: Yes)

[Among all respondents]
Customers could receive more than 1 bill per month?  (Correct Answer Residential: No / Commercial: Yes)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Chart 29 / MD PSC / 2002 Survey of Residential and Commercial Customers

New electric power suppliers are responsible for repairs following an outage?  (Correct Answer: No)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Customers must notify the current utility to switch to a new supplier? (Correct Answer: No)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Chart 31 / MD PSC / 2002 Survey of Residential and Commercial Customers

If a new supplier is not chosen, customers are placed in default service? (Correct Answer: Yes)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Once in default service, customer can switch to a new supplier?  (Correct Answer: Yes)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Chart 33 / MD PSC / 2002 Survey of Residential and Commercial Customers

There will be fewer regulations allowing suppliers to turn power off to customers? (Correct Answer: No)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Chart 34  / MD PSC / 2002 Survey of Residential and Commercial Customers

After service ends, who do you call if electricity goes out?  (Correct Answer: Current Utility)

[Among all respondents]

Source: RKM Research and Communications, Inc.
The change from standard to competitive service will happen at different times?  (Correct Answer: Yes)

[Among all respondents]

Source: RKM Research and Communications, Inc.
If a supplier goes out of business, the customer is switched to default service?  (Correct Answer: Yes)

[Among all respondents]

Source: RKM Research and Communications, Inc.
Chart 37 / MD PSC / 2002 Survey of Residential and Commercial Customers

Total Knowledge Index (Based on 10 Knowledge Questions):

[Among all respondents]

Residential Consumers  
(Avg Correct = 3.68)

<table>
<thead>
<tr>
<th>Correct</th>
<th>Percentage</th>
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<tbody>
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<tr>
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</tr>
<tr>
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<td>2.0%</td>
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<tr>
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<td>8.3%</td>
</tr>
<tr>
<td>0</td>
<td>5.3%</td>
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</tbody>
</table>

Commercial Consumers  
(Avg Correct = 3.98)

<table>
<thead>
<tr>
<th>Correct</th>
<th>Percentage</th>
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</thead>
<tbody>
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<td>1</td>
<td>8.0%</td>
</tr>
<tr>
<td>0</td>
<td>9.0%</td>
</tr>
</tbody>
</table>

Source: RKM Research and Communications, Inc.
Revised Knowledge Index (Based on 8 knowledge questions asked each year):

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
How reliable will electric service be after standard service ends?

[Among all respondents: compared over time]

**Residential Consumers**
- 2000: 58.7% more reliable, 11.7% less reliable, 24.6% same
- 2001: 47.9% more reliable, 21.4% less reliable, 31% same
- 2002: 47.8% more reliable, 13.2% less reliable, 40% same

**Commercial Consumers**
- 2000: 61.5% more reliable, 19.5% less reliable, 19% same
- 2001: 49.8% more reliable, 25.9% less reliable, 24.8% same
- 2002: 47.0% more reliable, 11.5% less reliable, 41.5% same

*Source: RKM Research and Communications, Inc.*
How will responsiveness to emergencies change after standard service ends?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
Chart 41 / MD PSC / 2002 Survey of Residential and Commercial Customers

How will consumer protections change after standard service ends?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
How likely is the current utility to respond to service requests?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
Chart 43 / MD PSC / 2002 Survey of Residential and Commercial Customers

Will problems associated with generating enough electricity for consumers get better or worse?

[Among all respondents: compared over time]

Residential Consumers

- 2000: Better 18.9%, Same 50.2%, Worse 31.9%
- 2001: Better 15.2%, Same 40.5%, Worse 44.3%
- 2002: Better 29.5%, Same 39.2%, Worse 31.3%

Commercial Consumers

- 2000: Better 13.9%, Same 50.8%, Worse 35.3%
- 2001: Better 18.9%, Same 50.8%, Worse 30.3%
- 2002: Better 25.5%, Same 40.5%, Worse 34.0%

Source: RKM Research and Communications, Inc.
Will problems with the transmission system get better or worse?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
How will competitive market forces affect the price you pay for electricity?

[Among all respondents: compared over time]

Source: RKM Research and Communications, Inc.
Chart 46 / MD PSC / 2002 Survey of Residential and Commercial Customers

View on the number of electric power suppliers?

[Among all respondents: compared over time]

Residential Consumers

- 2000: 7.7%
- 2001: 14.8%
- 2002: 17.1%

Commercial Consumers

- 2000: 51.6%
- 2001: 9.0%
- 2002: 15.0%

Source: RKM Research and Communications, Inc.
How well prepared to make an informed decision on choice of power supplier?

[Among all respondents]

Residential Consumers
- A lot more info: 56.5%
- More info: 10.4%
- Decide today: 3.9%
- Refused: 1.6%
- Not thought about: 27.6%

Commercial Consumers
- More info: 15.5%
- Decide today: 6.5%
- Refused: 4.5%
- Not thought about: 26.5%

Source: RKM Research and Communications, Inc.
Exposure to paid and earned media increases awareness of electric competition:

[Among residential customers only]

Source: RKM Research and Communications, Inc.
Exposure to paid and earned media increases awareness of electric competition:

[Among commercial customers only]

Source: RKM Research and Communications, Inc.
Exposure to paid and earned media increases awareness of specific campaign tools:

[Among residential customers only | 2002 results only]

Source: RKM Research and Communications, Inc.
Exposure to paid and earned media increases awareness of specific campaign tools:

[Among commercial customers only | 2002 results only]

Source: RKM Research and Communications, Inc.
Exposure to paid and earned media increases the likelihood that customers will obtain a copy of the guide:

[Among residential customers only]

Source: RKM Research and Communications, Inc.
Exposure to paid and earned media increases the likelihood that customers will obtain a copy of the guide:

[Among commercial customers only]

Source: RKM Research and Communications, Inc.
Use of the consumer guide increases real knowledge regarding the details of electric competition:

[Revised knowledge index (1-8 scale) among residential customers only]

Source: RKM Research and Communications, Inc.
Use of the consumer guide increases real knowledge regarding the details of electric competition:

[Revised knowledge index (1-8 scale) | among commercial customers only]

Source: RKM Research and Communications, Inc.