

BILL REDESIGN ONLINE RESEARCH

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RESULTS OF RESEARCH | MARCH 2, 2012



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Introduction

BACKGROUND AND PURPOSE

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A number of years have passed since the PG&E bill was updated. Working together with Swirl Integrated Marketing, PG&E is redesigning the bill to address areas of possible confusion and update its overall appearance.

In September 2011, Travis Research was commissioned by PG&E to conduct qualitative research among residential, small business and small agricultural customers. Segment specific bills, both current and prototype, were presented to respondents in order to gather their reactions and feedback. The research ultimately led to several enhancements to the bills.

As a next step in the research process, PG&E tested the new prototype designs *quantitatively* with the same customer segments. The objective of the research was to confirm that the new design accomplishes the following:

- Simplifies the bill
- Enhances its visual appeal
- Increases its user-friendliness.

Component objectives included:

- Gauge the level of acceptance of the redesigned version
- Measure acceptance of the redesigned versus the existing bill
- Identify most/least liked features and elements of the new design
- Measure key attributes, including:
 - Overall appearance
 - Ease of reading
 - Ability to find the most important information
 - Layout appeal
- Identify further areas for improvement.

The quantitative phase provides PG&E with additional recommendations for further optimizing the effectiveness of the new bill design.

Methodology

- An online survey was conducted among Residential and Commercial customers using a list provided by PG&E.
- The survey was conducted as follows:
 - Residential customers – December 16, 2011 – January 4, 2012
 - Commercial customers – December 27, 2011 – January 9, 2012.

Sample Design

- A total of 1,146 online surveys were completed with PG&E customers:

Segment	Quotas
Residential Customers	581
Non-CARE/BPP	279
CARE	151
Balanced Payment Plan	151
Commercial Customers	565
Small-Medium Business	304
Large Commercial/Industrial and Agricultural	109
Small Agricultural	152
TOTAL	1,146

- In addition to segment quotas (shown above), sub-quotas were applied for the following variables:
 - Residential customers – gender, age, geographic area, education, race/ethnicity
 - Commercial customers – business size, industry (categorized with NAICS codes), geographic area.

Respondent Screening

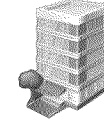
- Respondents were screened to meet the following criteria:

...Residential Customers...



- Person in household at least jointly responsible for reviewing/paying utility bill
- PG&E electricity and/or gas customer
- Receives monthly PG&E bill in the mail or online (if online, must at least occasionally review an electronic copy)
- Age 18+
- Sensitive industry screen.

...Commercial Customers...



- Person at business at least jointly responsible for reviewing utility bill
- PG&E electricity customer (no gas only customers)
- Receives monthly PG&E bill in the mail or online (if online, must at least occasionally review an electronic copy)
- Sensitive industry screen.

Weighting

- The data have been weighted to better represent the actual distribution of Residential and Commercial segments as follows:

	Residential	Commercial	
CARE Customers	28%	Small/Medium Business	87%
BPP Customers	6%	Large Business/Large Agriculture	4%
All Others	66%	Small Agriculture	9%

- The base sizes shown in the report reflect the *unweighted* totals.



Executive
Summary

KEY FINDINGS





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- This summarizes the findings from the online study conducted among PG&E Residential and Commercial customers December 16, 2011 to January 9, 2012.

...CURRENT VS. NEW BILL...

- While impressions of the current bill were generally neutral to positive, there was a clear preference for the new bill design among both Residential and Commercial customers.
- About nine out of ten respondents, across both segments, favored the new bill over the current (89% Residential, 93% Commercial).
- At over four out of five, more respondents gave top-3 box scores to the new bill on all key measures:

	TOP-3 BOX*			
	NEW BILL		CURRENT BILL	
	(A) Residential 	(B) Commercial 	(C) Residential 	(D) Commercial 
Overall impressions	82% C	85% D	48%	42%
Overall visual appeal	81% C	86% D	44%	42%
Ease of read	81% C	84% D	59%	54%
Ease of finding the most important elements	84% C	87% D	65%	58%
Ease of understanding	81% C	81% D	56% D	49%
Effectiveness of communicating usage	86% C	88% D	68% D	57%
Effectiveness of prompting thoughts about usage	83% C	83% D	51% D	41%

* Rated 8-10 on 10-point scale (scales defined in Detailed Findings)

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

- Across subgroups (Residential: CARE, BPP and Commercial: Small/Medium, Large Comm/AG, Small AG), findings were consistent, with a strong preference for the new bill.

The primary reasons for favoring the new bill were: ...REASONS FOR PREFERENCE...

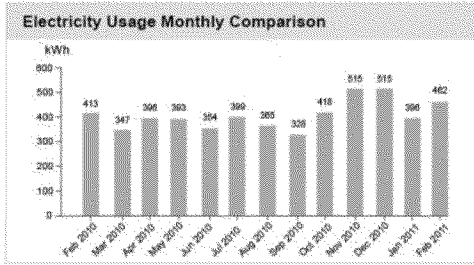
- User-friendliness
 - Appealing format/layout
 - Ease of reading/scanning/finding details
 - Clarity/ease of understanding
- Appealing graphs/charts
 - Clarity on usage
 - Additional information.

...MOST/LEAST LIKED AREAS OF NEW BILL...

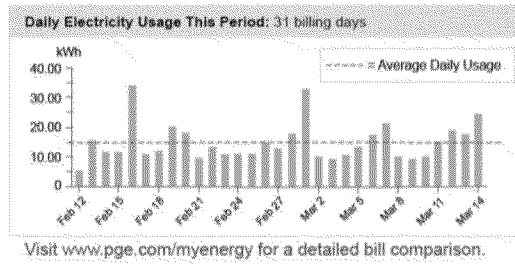
- The areas of the new bill that appealed most and least to customers are:

MOST LIKED

Monthly usage comparison graph
(page 1)



Daily usage graph
(pages 3-4)



LEAST LIKED

Rules and rates/Important definitions (page 2)

Rules and rates
You may be eligible for a lower rate. To find out about our optional rates or for a complete list of our rates and rates, visit www.pge.com or call 1-800-743-5000.

If you believe there is an error on your bill, email info@pge.com, or call 1-800-743-5000 for an explanation. If you are not satisfied with our response, contact the California Public Utilities Commission (CPUC), Consumer Affairs Branch, 505 Van Ness Avenue, San Francisco, CA 94102, 1-800-543-7570 or 415-703-2032 (TDD/TTY).

To avoid having service turned off while you wait for a CPUC decision, enclose a deposit check (payable to the CPUC) for the amount owed. The CPUC will only accept deposits for matters that relate directly to billing accuracy. If it is not possible for you to pay your deposit, you must advise the CPUC. PG&E can not turn off your service for nonpayment while it is under review by the CPUC, however, you must continue to pay your current charges to keep your service turned on.

If you are not able to pay your bill, call PG&E to discuss how we can help. You may qualify for reduced rates under PG&E's CARE program or other special programs and agencies may be available to assist you. You may qualify for PG&E's Energy Partners Program which is an energy efficiency program for income-qualified residential customers.

Important definitions
Rotating outage block: Customers are grouped into "blocks" based on their location. In the event that the California Independent System Operator declares a power emergency due to an energy shortage, certain blocks may experience power supply interruptions based on their location. Rotating outage blocks are subject to change without advance notice due to operational conditions.
Baseline allowance: All residential customers are given a baseline allowance, which represents a percentage of average customer usage during summer and winter months. Your total allowance is your assigned usage level based on the climate where you live, the current season and your heat source. The energy that you use within your allowance is charged at the lowest rate (Tier 1). The purpose of your baseline is to provide for basic needs at an affordable price and to encourage conservation.
Gas meter multiplier: Converts the cubic feet of gas, as measured by your gas meter, to therms of energy and adjusts for variances in the heat content of gas.
Electric meter constant: Converts the difference in your meter readings to the actual electricity used.
Public Purpose Program (PPP): Funds collected to pay for assistance programs for low-income customers and energy-efficiency programs.
Competition Transition Charge (CTC): The cost of certain purchased power agreements as well as a portion of electric industry restructuring implementation costs as authorized by the CPUC.
DWR bond charge: Recovers the cost of bonds issued to finance a portion of the historic cost of power purchased by California Department of Water Resources (DWR) to serve electric customers. DWR bond charges are collected on behalf of DWR and do not belong to PG&E.
DWR power charge: Included for the portion of your energy usage provided by the Department of Water Resources. DWR receives \$0.0875 per kWh it provides.
Energy Cost Recovery Amount (ECRA): These charges are imposed pursuant to law. One of these charges is the Dedicated Rate Component (DRC), which is \$0.00519 per kWh. The right to receive DRC revenues has been sold to a special purpose entity, PG&E Energy Recovery Funding LLC, and PG&E is collecting this charge on behalf of PG&E Recovery Funding LLC. This charge does not belong to PG&E.
Gas Procurement: This is the purchase price for natural gas and is set on a monthly basis.

- The graphs overall, but especially the monthly and daily comparison graphs, had strong appeal to customers and set the new bill apart from the current.
- The dense areas of page 2 with small type, in particular the Rules and Rates and Important Definitions, were least appealing. The Important Definitions were disliked more so among Commercial than Residential customers.

...SUGGESTIONS FOR IMPROVEMENT FOR THE NEW BILL...

- Customers offered few suggestions for the new bill, with over half indicating there is nothing they can recommend adding.
- Among the few who did have recommendations, some suggested more detail/information, in particular related to usage and charges, while others would have preferred less information and a more concise bill.

...SPECIFIC ELEMENTS...

Respondents were given choices for a series of bill elements and asked their preference. Following summarizes the findings:

Residential Customers



BILL ELEMENTS	CUSTOMER PREFERENCE	
▪ Smaller vs. Larger Font in “Service For” Area	61% Larger font 44% Willing to sacrifice size in other areas of bill 39% Not willing to sacrifice size in other areas of bill	
▪ Vertical vs. Horizontal Usage Tiers	49% Horizontal boxes	
▪ Historical vs. Average Daily Usage	68% Preferred monthly (historical) usage graph 69% Found monthly usage graph more useful	
▪ BPP Graph vs. No Graph	80% Image with graph	
▪ Most/Least Useful Graphic Elements	<u>Most Useful</u> 31% Daily electricity usage graph 31% Monthly comparison usage graph	<u>Least Useful</u> 45% Tiered electric usage graph 32% Average Daily usage graph

Commercial Customers



- Historical vs. Average Daily Usage
 - 55% Preferred monthly (historical) usage graph**
 - 55% Preferred monthly usage graph on first page of bill**

CONCLUSIONS

- As with the qualitative research conducted in September 2011 among the same customer segments, there was a strong preference for the new bill over the current.
- On a variety of attributes, the new bill consistently outperformed the one currently in use.

- Customers found the new bill easier to read and perceived it as more user-friendly, from its organization to its overall appearance.
- The graphs, in particular the monthly and daily usage comparison graphs, set the new design apart from the current and appealed to customers who considered the information displayed in this manner useful.

- The least valued part of the bill was the small-print reference information on page 2.

- Most considered the new bill fine as is and had no suggestions for improvement.
- Those who did make recommendations were mixed on whether to add or remove information.
- Given alternative elements on the bill, customers tended to prefer visuals with the following characteristics:
 - Graphs – Historical usage (monthly/daily) over average usage
 - Larger font for key pieces of information
 - Horizontal display of usage (tiers)
 - Simpler numbers (fewer decimal places).

RECOMMENDATIONS

- **Proceed with finalizing development of the new bill design.**

- **Keep the overall layout of the new bill, including the graphs featured.**

- **If possible, remove the Rules and Rates and Important Definitions from the bill and provide a link to the website where this information can be found.**
- **If not possible to eliminate this information from the bill, maintain its less prominent, backside placement to be consulted only when needed.**

- **Incorporate the preferred characteristics where relevant to enhance ease of read and visual appeal.**

DETAILED FINDINGS

Bill
Review
Process

Reactions to
Current
Bill

Reactions to
New Bill

Bill
Preference
and
Comparisons

Specific
Elements of
New
Residential
Bill

Specific
Elements of
New
Commercial
Bill

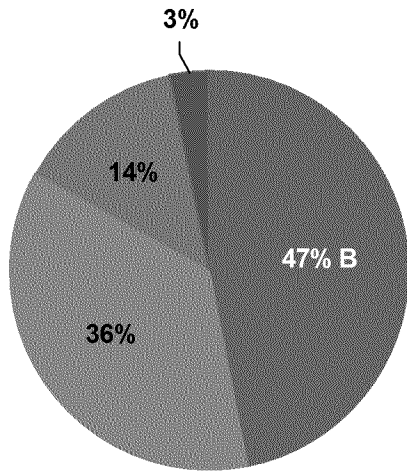
THOROUGHNESS OF REVIEWING MONTHLY PG&E BILL

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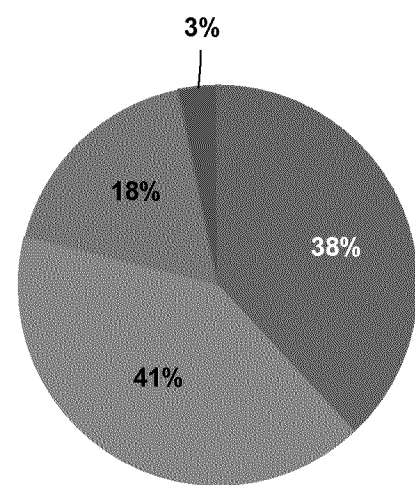
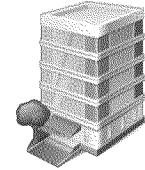


- Nearly half of Residential customers claimed to read their monthly bills thoroughly, while fewer Commercial customers reported the same.
- At about two out of five, nearly equal proportions of Commercial customers at least glance at their bills if not read them thoroughly.
- Only 3% of each group reported they pay their bills without looking at them.

(A)
Residential
(n=581)



(B)
Commercial
(n=565)



Thoroughly read every page
 Glance at bill but don't read thoroughly
 Briefly scan/look at front page only
 Just pay bill and don't look at it

Q.2. "How **THOROUGHLY** do you usually review your monthly printed bills from PG&E?"

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.



Q.2
T.12

MOST IMPORTANT ELEMENTS OF BILL*

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- Payment due date and details of electricity/gas charges (including taxes and fees) were the bill elements Residential and Commercial customers found most important.
- Commercial customers placed greater importance on service address than did Residential customers.
- Although small on an absolute basis, billing terms/conditions and electric industry definitions were more important to Residential customers than they were to Commercial customers.

	(A) Residential (n=581) 	(B) Commercial (n=565) 
Payment due date	84%	87%
Detailed electric/gas charges, taxes and fees	83%	81%
Service dates	76%	75%
Previous balance/amount paid	76%	78%
Discounts/rebates received	45%	44%
Account number	41%	42%
1-800 customer service number	30%	26%
Service address	20%	32% A
Customized messages about products, services, discounts, rebates or tips for savings energy	16%	18%
Billing terms and conditions	9% B	5%
PG&E website	8%	5%
Electric industry definitions	6% B	3%
Local PG&E office address	4%	3%
Specialized customer service phone numbers	3%	3%

Discounts and rebates received were more important to CARE and BPP customers (CARE 70%, BPP 44%) than to other Residential customers (34%, not shown).

* Other than name, billing address and amount due.

Q.3. "Please select your top five most important elements of the PG&E bill (other than your name, billing address or amount due)."

Base: Total Residential: (n=581); Banner 1A
Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.3
T.13



- Two out of three Residential customers expressed a high degree of satisfaction with PG&E's billing and payment process, slightly higher than that for Commercial customers.
- Those with some degree of dissatisfaction most commonly attributed it to billing issues or the bill itself.
 - At nearly half, more Commercial than Residential customers gave this reason and specifically mentioned the billing format or layout.

	(A) Residential (n=581) 	(B) Commercial (n=565)
Satisfaction with Billing/Payment Process*		
Top-3 Box	67% B	59%
Bottom-5 Box	19%	22%
Reasons for Dissatisfaction**		
(Base: Rated PG&E 1-5 on Satisfaction with Process*)	(n=111)	(n=122)
Bill/Billing-Related	31%	48% A
Not user-friendly	13%	18%
Billing cycle/bill disbursement-related	9%	18%
Lacking details	6%	6%
Billing format/layout	3%	10% A
Payment-Related	27%	21%
Website payment-related	16%	9%
Can't pay with a credit card	5%	4%
Not allowed to use credit/debit card for online payment	4%	--
Phone payment-related	3%	3%
Other payment mentions	4%	3%
Cost-Related	15%	15%
Bill/charges/fees too high	8%	7%
Skepticism about costs/charges	6%	5%
Other cost mentions	1%	3%
General website-related	14%	12%
Customer service	6%	9%
Don't know/no answer	18%	11%

Q.4. "How satisfied are you with the **PG&E BILLING AND PAYMENT** process overall?"
 Q.4.1 "Why are you less than satisfied with the current billing and payment process at PG&E?"

* 10-point scale: 10="Extremely Satisfied"; 1="Extremely Dissatisfied."
 ** Multiple responses allowed. Mentions of less than 3% of both Residential and Commercial not shown.

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.4/4.1
 T.14/15

FREQUENCY/IMPORTANCE OF MATCHING DETAILED CHARGES TO TOTAL AMOUNT DUE

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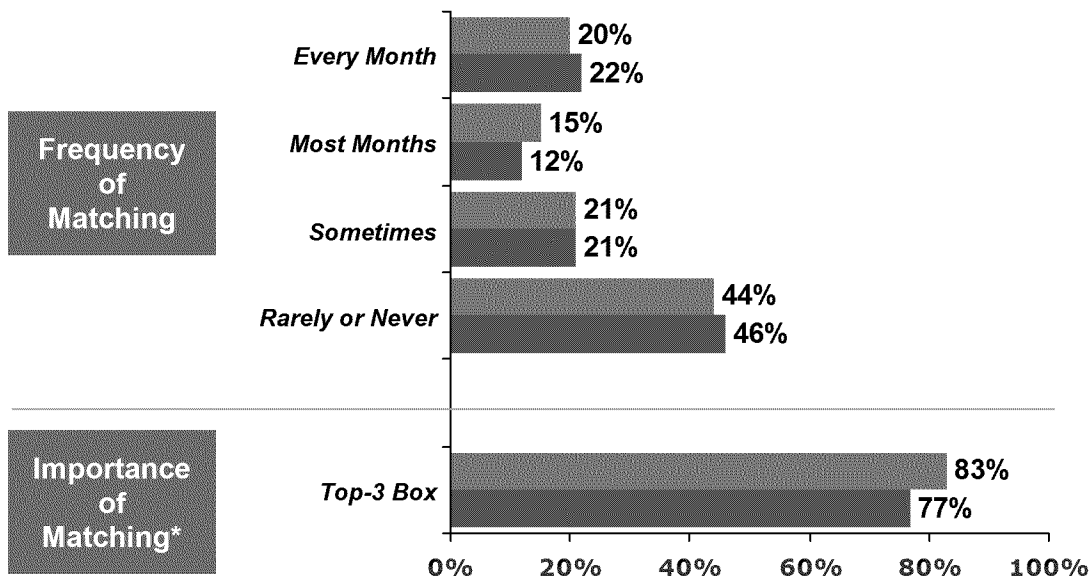


Residential (n=581)



Commercial (n=565)

- Although nearly half of respondents (both Residential and Commercial) rarely check that their detailed charges match the amount due, about four out of five in both groups indicated it's important that they are able to.



Q.18. "How often do you add up the detailed charges to see if they match your **TOTAL AMOUNT DUE**?"

Q.18.1 "How important is it that you are able to sync up the bill detail with the total charges?"

* 10-point scale: 10="Extremely Important"; 1="Not At All Important."

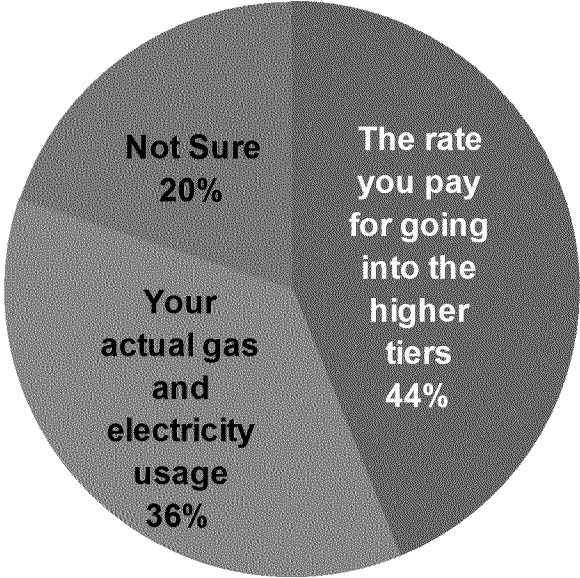
Base: Total Residential: (n=581); Banner 1A
Total Commercial: (n=565); Banner 1U

Q.18/18.1
T.108/109



Greater Impact on Charges

- When Residential customers were asked to identify the element that has greater impact on their monthly utility charges, directionally more believed that the rate for higher usage tiers trumps the actual gas/electricity usage.



Q.17 "In your opinion, which of the following has greater **IMPACT** on your monthly PG&E charges?"

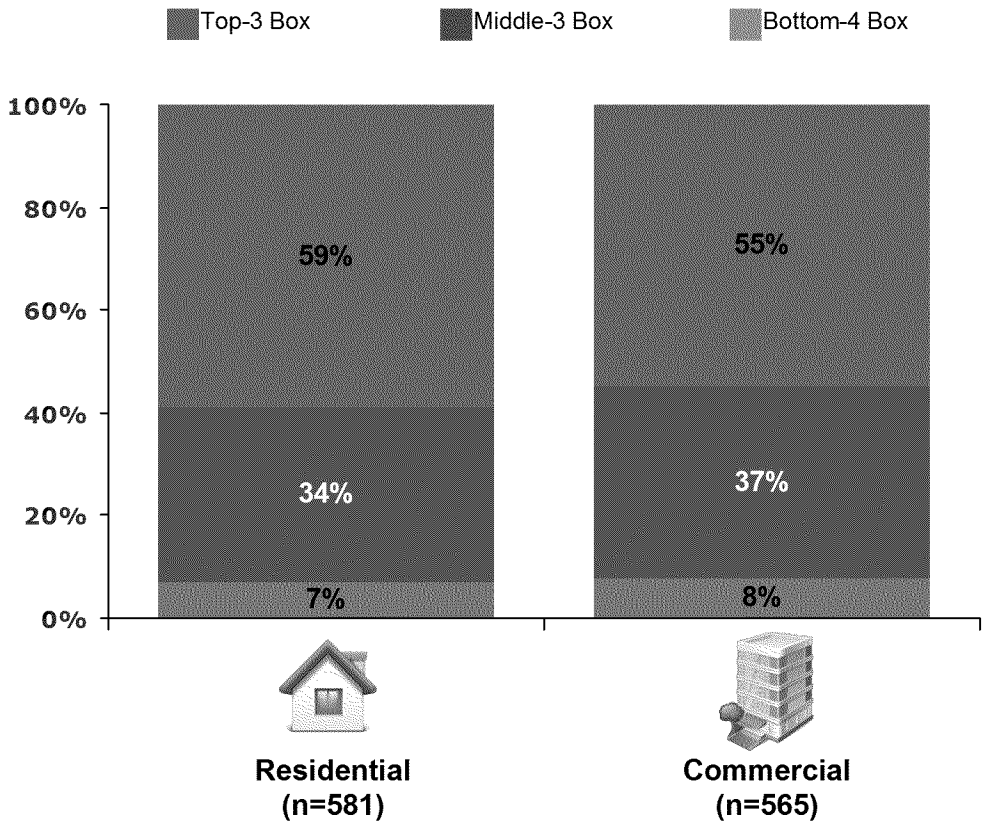
Base: Total Residential: (n=581); Banner 1A

Q.17
T.107



- Satisfaction with PG&E was similar for the two customer groups, with over half of both assigning top-3 box scores to PG&E.

Satisfaction with PG&E Overall



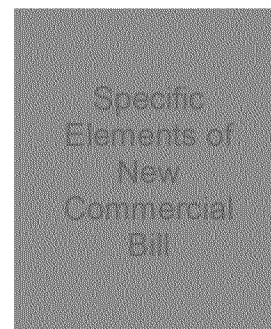
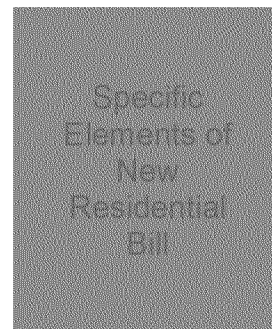
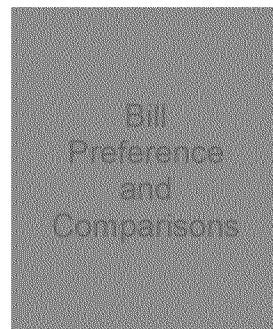
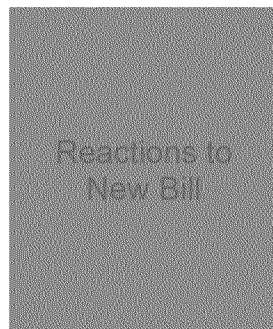
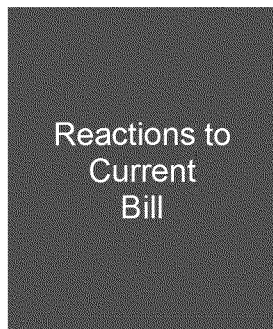
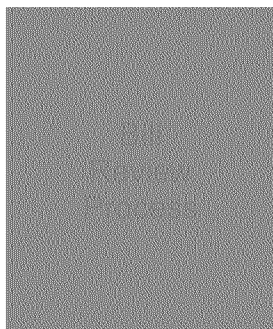
Q.1. "How would you rate products and/or services offered by PG&E?"

10-point scale: 10="Extremely Satisfied"; 1="Extremely Dissatisfied."

Base: Total Residential: (n=581); Banner 1A
Total Commercial: (n=565); Banner 1U

Q.1
T.11

DETAILED FINDINGS

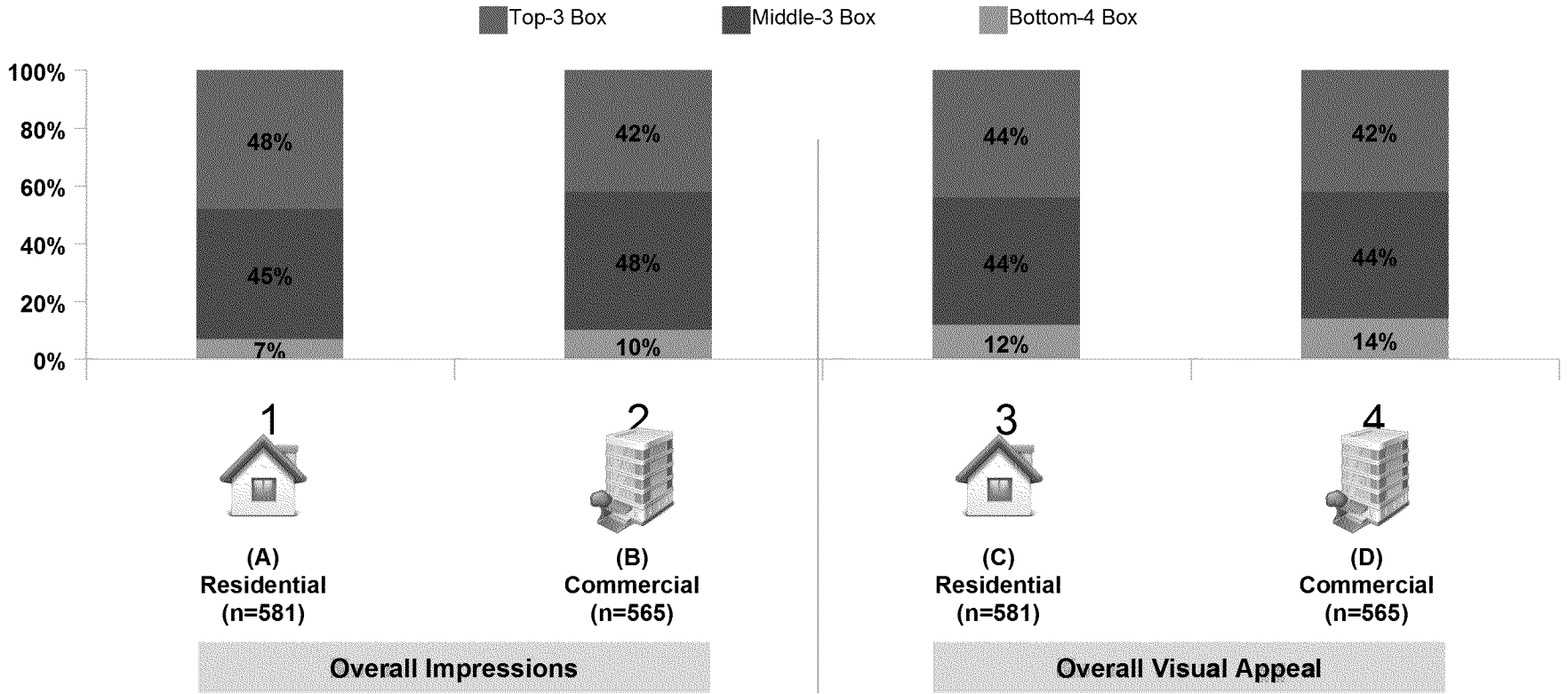


OVERALL IMPRESSIONS/VISUAL APPEAL

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- Residential and Commercial customers had neutral to positive impressions of the current bill and its appearance.



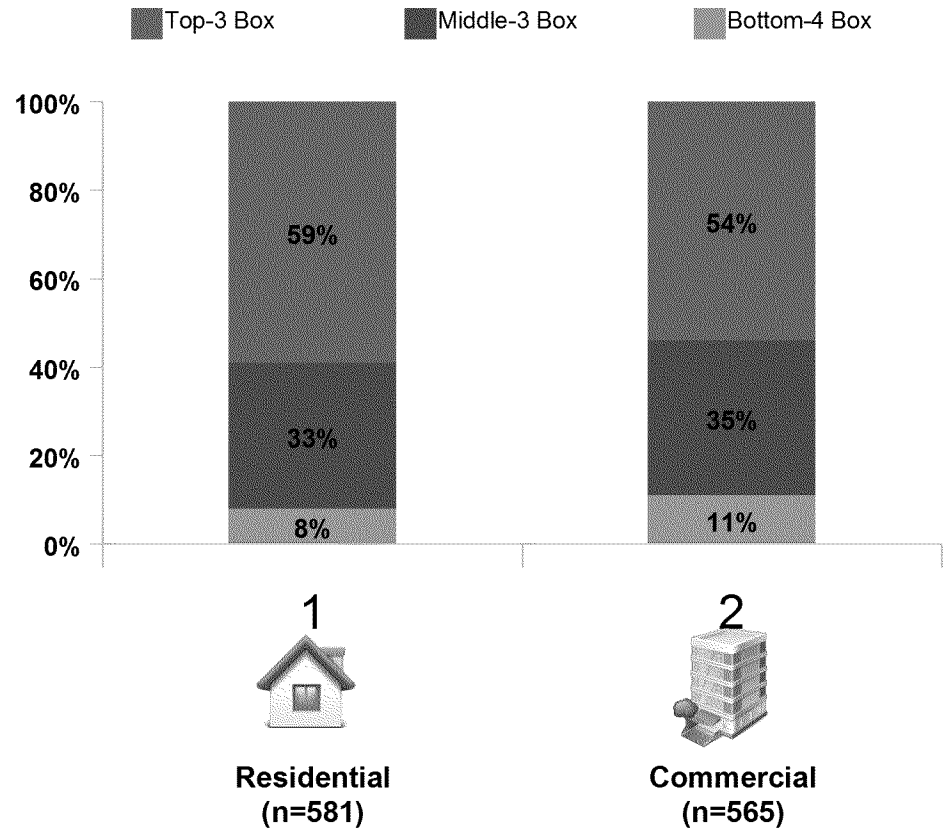
Q.6.1 "What are your **OVERALL IMPRESSIONS** of this bill?"
 Q.6.2 "What is your opinion of the **OVERALL VISUAL APPEAL** of this bill?"

10-point scale: 10="Extremely Favorable"/"Outstanding"; 1="Not Favorable At All"/"Extremely Poor."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Q.6.1/6.2
 T.16/17

- The current bill received high marks on ease of reading from over half of respondents, both Residential and Commercial.



Q.6.3a "In your opinion, how easy or difficult is it to **READ** this bill overall?"

10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U



Q.6.3a
 T.18

EASE OF FINDING MOST IMPORTANT ELEMENTS

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- The majority of respondents in both groups gave high marks to the current bill for ease of finding the bill elements most important to them.
 - Among Commercial respondents, more Small/Medium Business than Large Business/Agriculture customers reported an easy time finding the most important elements (60% Small/Medium Business vs. 48% Large Business/Agriculture, not shown).
- As for finding *specific* elements, the Total Amount Due topped the list at about nine out of ten Residential and Commercial customers, followed closely by Account Number and Payment Due Date.

	Top-3 Box	
	(A) Residential (n=581) 	(B) Commercial (n=565) 
Finding Most Important Elements	65%	58%
Finding Specific Elements		
Total amount due	91%	91%
Account number	87%	85%
Payment due date	87%	88%
Remaining account balance (BPP only*)	83%	N/A
1-800 phone number	76%	80%
PG&E website address	60% B	52%
Discount and rebates (CARE only*)	47%	N/A

Q.6.3b. "In your opinion, how easy or difficult is it to **FIND THE MOST IMPORTANT INFORMATION** on this bill?"
 Q.6.4a-g "Please rate the ease of **FINDING** each of the bill elements."

Rated 8-10 on 10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U
 * BPP only (n=151), CARE only (n=151)

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.



Q.6.3b/6.4a-g
 T.19/22

CLARITY AND EASE OF UNDERSTANDING SPECIFIC ELEMENTS

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- Over half of Residential customers indicated they find the current bill quite easy to understand, somewhat more than the Commercial customers who said the same.
- With the exception of Electric Industry Definitions, the majority of respondents expressed a high degree of understanding of all bill components listed.
- Residential customers reported greater ease in understanding the following bill elements than did their Commercial counterparts:
 - Account summary
 - Information on paying the bill
 - Electric industry definitions
 - Electric account details.

	Top-3 Box	
	(A) Residential (n=581) 	(B) Commercial (n=565) 
Understanding Bill Overall	56% B	49%
Understanding Specific Elements		
Page 1		
Total amount due (BPP only*)	93%	N/A
Account summary	84% B	78%
Remaining account balance (BPP only*)	83%	N/A
CARE discount (CARE only*)	53%	N/A
Page 2		
Helpful phone numbers	69%	65%
Information about paying your bill	63% B	56%
Electric industry definitions	49% B	40%
Page 3		
Gas account detail	64%	N/A
Page 4		
Electric account detail	63% B	51%

Q.6.3c. "In your opinion, how easy or difficult is it to **UNDERSTAND** this bill?"
 Q.6.5.1-6.5.4 "How **CLEAR** and **EASY TO UNDERSTAND** do you find each of the bill elements?"

Rated 8-10 on 10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U
 * CARE only (n=151), BPP only (n=151)

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

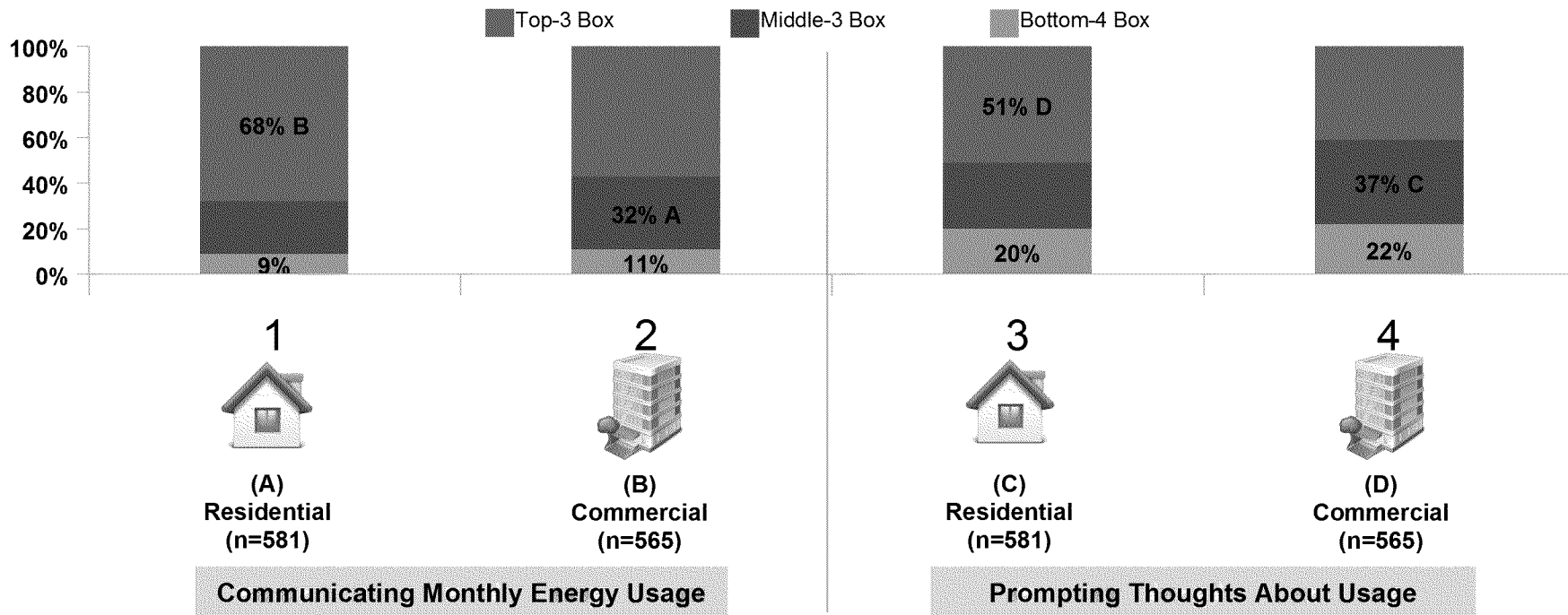
Q.6.3c/6.5.1-6.5.4
T.20/26-34

EFFECTIVENESS OF BILL IN COMMUNICATING USAGE AND PROMPTING THOUGHTS ABOUT USAGE

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- Two out of three Residential customers gave the current bill top marks on communicating monthly energy usage, slightly more than those who reported the same among Commercial customers.
- Similarly, more Residential than Commercial customers felt the current bill does a strong job of spurring thoughts about the amount of energy one uses.



Q.6.6 "In your opinion, how effective is this bill in communicating your monthly energy usage?"
 Q.6.7 "How effective is this bill in getting you to think about the amount of energy you use each month?"

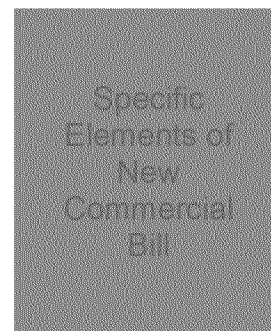
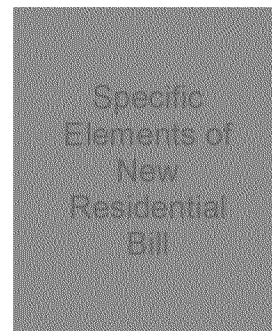
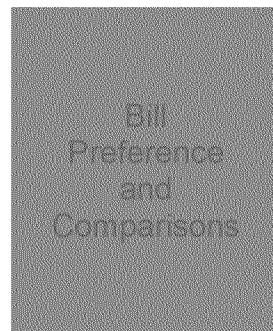
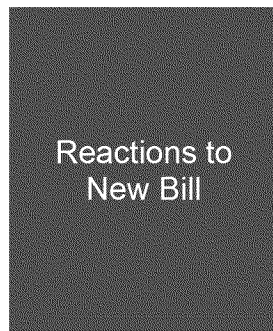
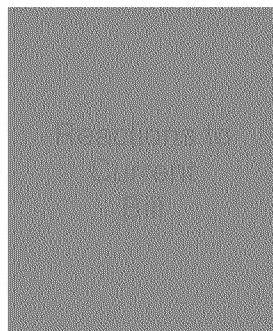
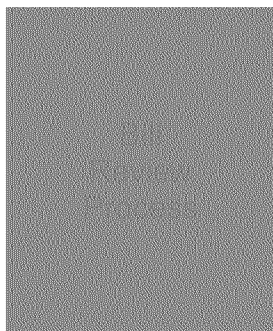
10-point scale: 10="Extremely Effective"; 1="Not At All Effective."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.6.6/6.7
 T.35/36

DETAILED FINDINGS

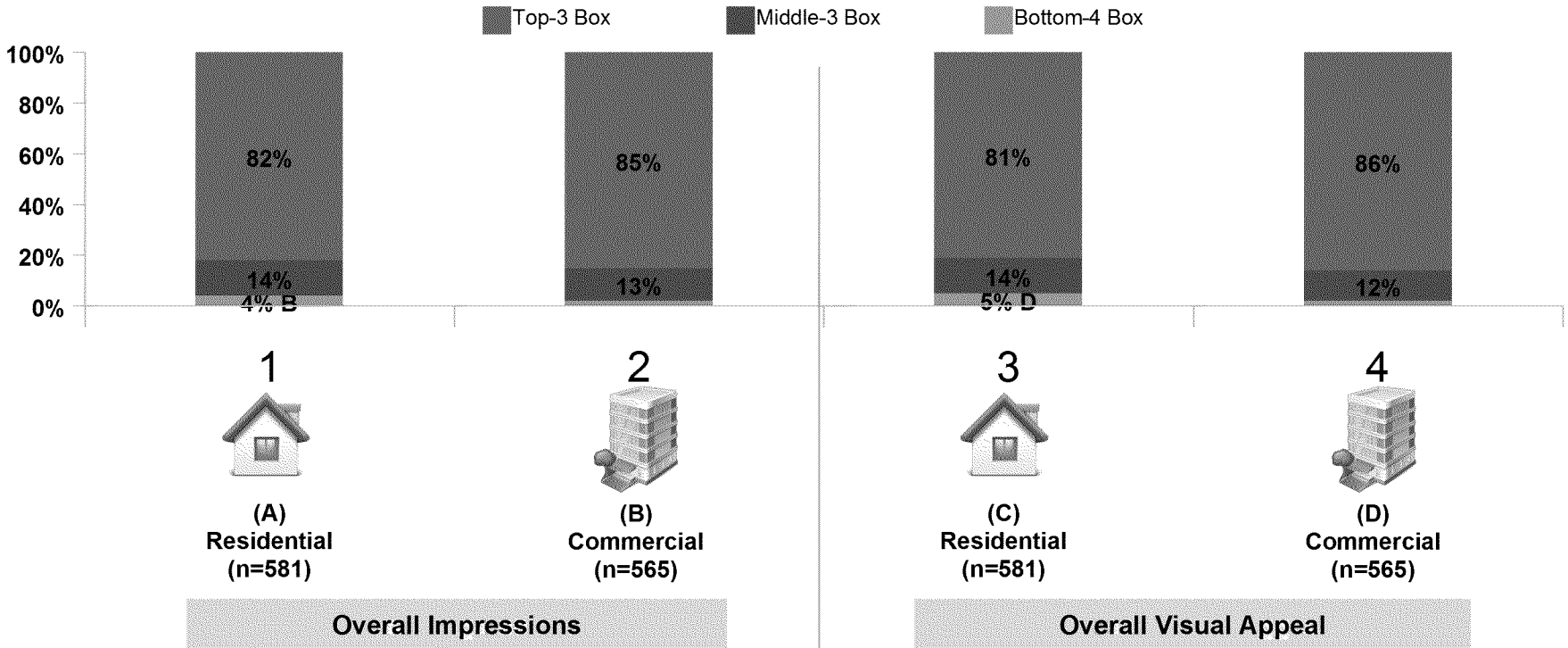


OVERALL IMPRESSIONS/VISUAL APPEAL

Contains confidential information, provided pursuant to PUC § 583



- Over four out of five in both groups gave top ratings to the new bill on its overall appearance.
- Only a small proportion assigned low-end ratings, fewer among Commercial than Residential customers.



Q.7.1 "What are your **OVERALL IMPRESSIONS** of this bill?"
 Q.7.2 "What is your opinion of the **OVERALL VISUAL APPEAL** of this bill?"

10-point scale: 10="Extremely Favorable"/"Outstanding"; 1="Not Favorable At All"/"Extremely Poor."

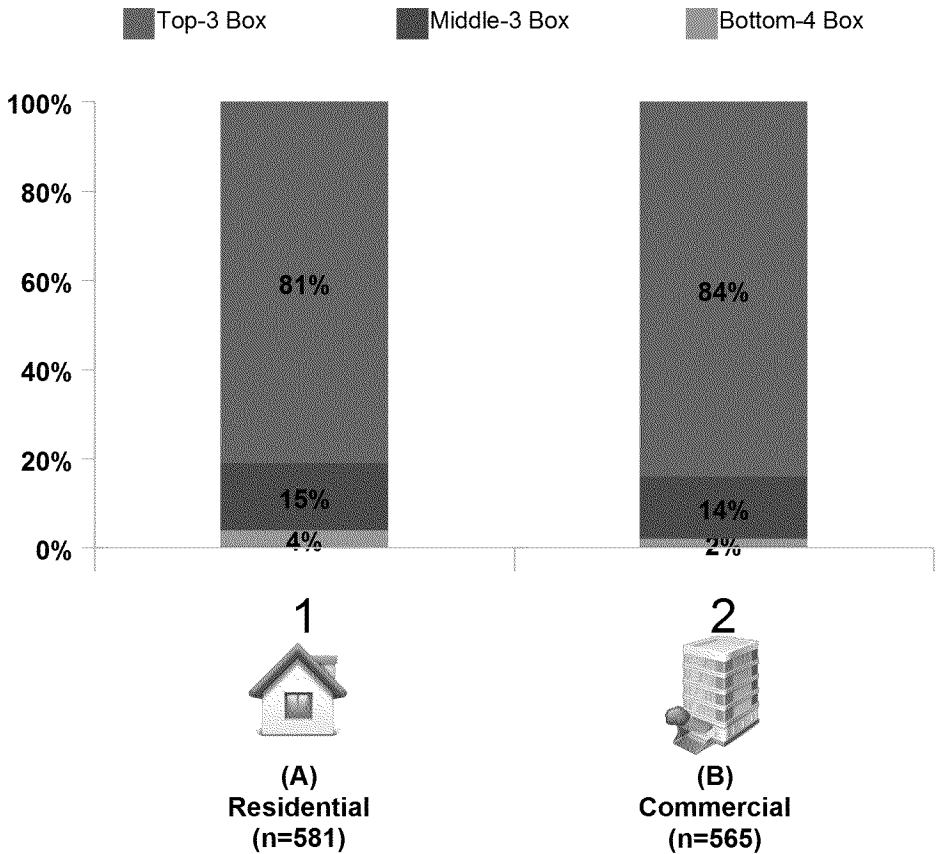
Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.7.1/7.2
 T.37/38



- Across both groups, four out of five found the new bill very easy to read.



Q.6.3a "In your opinion, how easy or difficult is it to **READ** this bill overall?"



10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Q.7.3a
 T.39



- On finding the most important elements, again more than four out of five gave top ratings to the new bill.
- Over nine out of ten in both groups assigned top-3 box ratings to ease of finding key front page information:
 - Payment due date
 - Total amount due (slightly higher among Commercial than Residential customers)
 - Account number.

	Top-3 Box	
	(A) Residential (n=581) 	(B) Commercial (n=565) 
Finding Most Important Elements	84%	87%
Finding Specific Elements		
Payment due date	93%	94%
Total amount due	93%	96% A
Account number	92%	94%
1-800 phone number	89%	90%
Remaining account balance (BPP only*)	89%	N/A
PG&E website address	85%	83%
Discount and rebates (CARE only*)	74%	N/A

Q.7.3b. "In your opinion, how easy or difficult is it to **FIND THE MOST IMPORTANT INFORMATION** on this bill?"
 Q.7.4a-g "Please rate the ease of **FINDING** each of the bill elements."

Rated 8-10 on 10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U
 * BPP only (n=151), CARE only (n=151)

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.7.3b/7.4a-g
T.40/43

CLARITY AND EASE OF UNDERSTANDING SPECIFIC ELEMENTS



Contains confidential information, provided pursuant to PUC § 583



- The new bill also garnered top scores from about four out of five respondents on ease of understanding.
 - While over three-fourths of CARE customers gave high marks on this measure, fewer did so than among Residential customers who do not participate in CARE or BPP (76% CARE vs. 84% Non-CARE/BPP, not shown).
- Over seven out of ten found all specific elements of the bill tested clear and easy to understand.

Q.7.3c. *"In your opinion, how easy or difficult is it to UNDERSTAND this bill?"*
 Q.7.5.1-7.5.4 *"How CLEAR and EASY TO UNDERSTAND do you find each of the bill elements?"*

Rated 8-10 on 10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."
 Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U
 * CARE only (n=151), BPP only (n=151)

	Top-3 Box	
	(A) Residential (n=581) 	(B) Commercial (n=565) 
Understanding Bill Overall	81%	81%
Understanding Specific Elements		
Page 1		
Monthly usage comparison graphs	88%	91%
Account summary	88%	91%
Important messages	82%	78%
Savings alert discount (CARE only*)	76%	N/A
Average daily usage graph	N/A	89%
Page 2		
Important phone numbers	83%	86%
Options for paying your bill	79%	79%
Important definitions	73%	73%
Rules and rates	72%	73%
Page 3-4		
Daily usage graph	85%	86%
Average daily usage graph	85%	N/A
Charges breakdown	84%	80%
Service information	81%	80%
Tiered usage information	76%	N/A
Details of electricity charges	N/A	81%
Peak usage table	N/A	81%

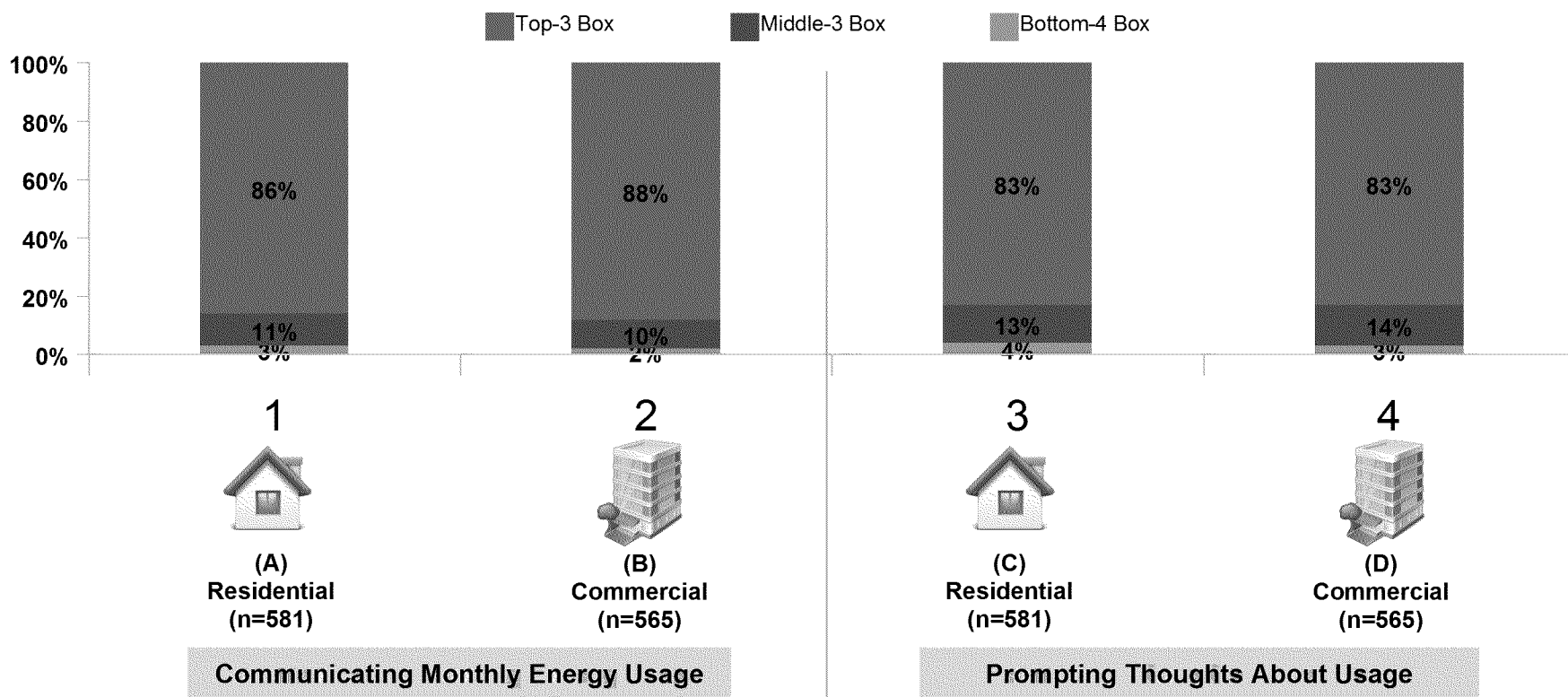
Q.7.3c/7.5.1-7.5.5
T.41/47-62

EFFECTIVENESS OF BILL IN COMMUNICATING USAGE AND PROMPTING THOUGHTS ABOUT USAGE

Confidential information, provided pursuant to PUC § 583



- Over four out of five Residential and Commercial customers gave the new bill top marks on communicating monthly energy usage as well as getting customers to think about their usage each month.



Q.7.6 "In your opinion, how effective is this bill in communicating your monthly energy usage?"

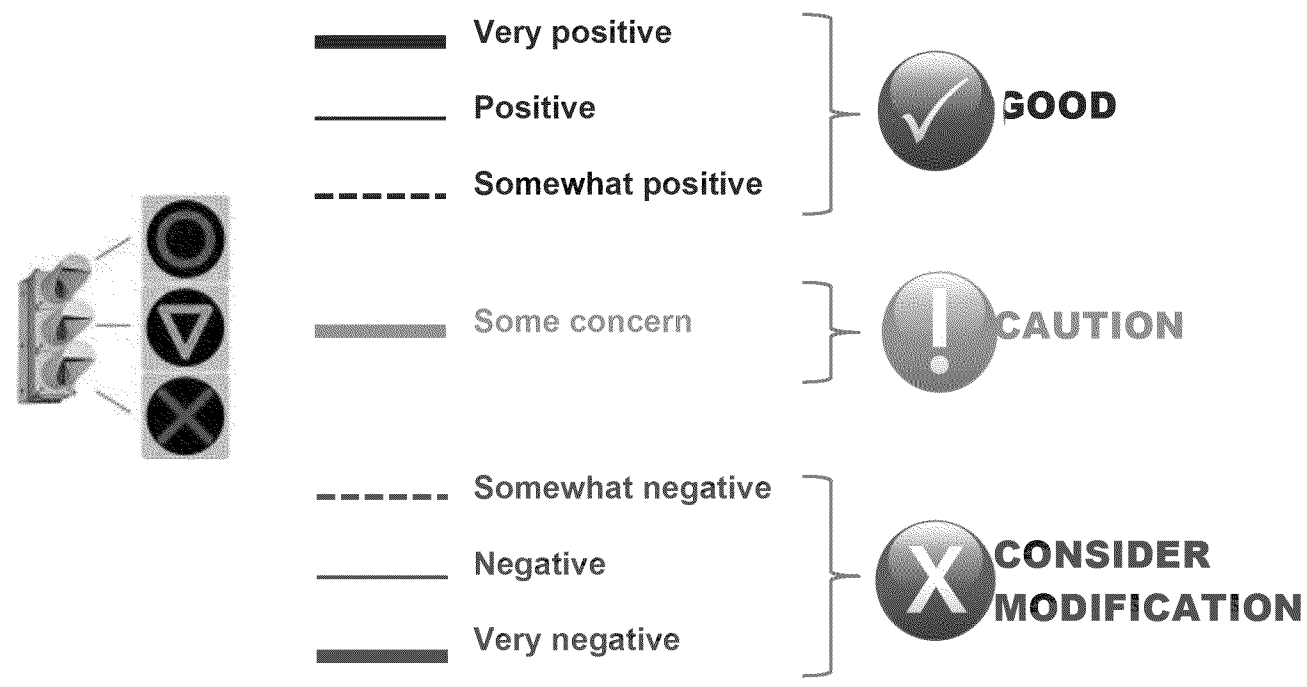
Q.7.7 "How effective is this bill in getting you to think about the amount of energy you use each month?"

10-point scale: 10="Extremely Effective"; 1="Not At All Effective."

Base: Total Residential: (n=581); Banner 1A
Total Commercial: (n=565); Banner 1U

Q.7.6/7.7
T.66/67

- Respondents were asked to complete a highlighting exercise in which they indicated areas of the new bill they like (in green) and those they do not like (in red).
- Most areas of the bill received overall positive reactions, in particular on pages 3-4. The area of greatest concern was page 2 with its small font and dense type, primarily the Rules and Rates section.



- The following pages show respondent reactions to the various elements of the new bill (both Resi-dential and Commercial).
- The legend to the left provides an explanation of the colors and lines.
- Please see the Appendix (page 61) for an explanation of the algorithm used to determine the color/line assignments.

REACTIONS TO NEW BILL LIKES/DISLIKES – RESIDENTIAL

Contains confidential information, provided pursuant to PUC § 583



(Page 1 of 4)

(Page 2 of 4)

ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1023456789-0
Statement Date: Mar 16, 2011
Due Date: **Apr 6, 2011**

Service For:
Residential Customer
1234 Main Street
Extra Address Line
Anytown, CA 00000

Your Account Summary

Amount Due on Previous Statement	\$143.52
1 Payment(s) Received Since Last Statement	- \$143.52
Past Due Amount	\$ 0.00
Current Electricity Charges	\$ 74.35
Current Gas Charges	\$104.55
Total Amount Due by Apr 6, 2011	\$178.90

Savings Alert: You've earned a Winter Gas Savings Credit of \$50.17 which is reflected in the total amount due.

Electricity Usage Monthly Comparison

Gas Usage Monthly Comparison

Important Messages

For details of charges, taxes and surcharges, daily usage details from your SmartMeter, and additional payment options, you may access your account online at www.pge.com/MyEnergy. The California Alternate Rates for Energy (CARE) Program provides a monthly discount on energy bills for income-qualified households. Applying is free, easy and confidential. To see if you qualify, please visit www.pge.com/care or call 1-866-743-2273.

El programa de California alternate Rates for Energy (CARE) ofrece un descuento en la cuenta mensual de energia a los hogares que califican. Inscribirse en el programa es gratis, facil y confidencial. Para determinar si califica, por favor visite nuestra pagina en el Internet www.pge.com/care o llamemos al 1-866-743-2273.

Please return this portion with your payment. Thank you. No staples, please.

Account Number:
1023456789-0

Due Date:
Apr 6, 2011

Total Amount Due:
\$178.90

Amount Enclosed:
\$

1900.22.526.114921 1 AT 0.308

RESIDENTIAL CUSTOMER
1234 MAIN STREET
EXTRA ADDRESS LINE
ANYTOWN, CA 00000

PG&E
BOX 997300
SACRAMENTO, CA 95899-7300

99901234567890100000XXXXXX000000XXXXXXX

Recycled Paper
30% Post-Consumer Waste

ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1023456789-0
Statement Date: Mar 16, 2011
Due Date: **Apr 6, 2011**

Important Phone Numbers – 24 hours per day, 7 days per week

Customer Service (English; Relay Calls Accepted) 1-800-743-5000
TDD/TTY (Speech/Hearing Impaired) 1-800-652-4712

Servicio al Cliente en Espanol (Spanish)	1-800-660-6789	Smarter Energy Line	1-800-933-9555
XXXXXXXXXXXXXXXX (Chinese)	1-800-893-9555	Energy Theft Hotline	1-800-854-6250
XXXXXXXXXXXXXXXX (Vietnamese)	1-800-298-8438	To Request a Claim Form	1-800-743-5000
Other Languages	1-800-743-5000		

Rules and rates

You may be eligible for a lower rate. To find out about our optional rates or for a complete list of our rules and rates, visit www.pge.com or call 1-800-743-5000.

If you believe there is an error on your bill, email info@pge.com, or call 1-800-743-5000 for an explanation. If you are not satisfied with our response, contact the California Public Utilities Commission (CPUC), Consumer Affairs Branch, 505 Van Ness Avenue, San Francisco, CA 94102, 1-800-649-7570 or 415-703-2032 (TDD/TTY).

To avoid having service turned off while you wait for a CPUC decision, enclose a deposit check (payable to the CPUC) for the amount owed. The CPUC will only accept deposits for matters that relate directly to billing accuracy. If it is not possible for you to pay your deposit, you must advise the CPUC. PG&E can not turn off your service for nonpayment while it is under review by the CPUC; however, you must continue to pay your current charges to keep your service turned on.

If you are not able to pay your bill, call PG&E to discuss how we can help. You may qualify for reduced rates under PG&E's CARE program or other special programs and agencies may be available to assist you. You may qualify for PG&E's Energy Partners Program which is an energy efficiency program for income-qualified residential customers.

Important definitions

Rotating outage block: Customers are grouped into "blocks" based on their location. In the event that the California Independent System Operator declares a power emergency due to an energy shortage, certain blocks may experience power supply interruptions based on their location. Rotating outage blocks are subject to change without advance notice due to operational conditions.

Baseline allowance: All residential customers are given a baseline allowance, which represents a percentage of average customer usage during summer and winter months. Your total allowance is your assigned usage level based on the climate where you live, the current season and your heat source. The energy that you use within your allowance is charged at the lowest rate (Tier 1). The purpose of your baseline is to provide for basic needs at an affordable price and to encourage conservation.

Gas meter multiplier: Converts the cubic feet of gas, as measured by your gas meter, to therms of energy and adjusts for variances in the heat content of gas.

Electric meter constant: Converts the difference in your meter reading to the actual electricity used.

Public Purpose Program (PPP): Funds collected to pay for assistance programs for low-income customers and energy-efficiency programs.

Competition Transition Charge (CTC): The cost of certain purchased power agreements as well as a portion of electric industry restructuring implementation costs as authorized by the CPUC.

DWR bond charge: Recovers the cost of bonds issued to finance a portion of the historic cost of power purchased by California Department of Water Resources (DWR) to serve electric customers. DWR bond charges are collected on behalf of DWR and do not belong to PG&E.

DWR power charge: Included for the portion of your energy usage provided by the Department of Water Resources. DWR receives \$0.087 per kWh it provides.

Energy Cost Recovery Amount (ECRA): These charges are imposed pursuant to law. One of these charges is the Dedicated Rate Component (DRC), which is \$0.0619 per kWh. The right to receive DRC revenues has been sold to a special purpose entity, PG&E Energy Recovery Funding LLC, and PG&E is collecting this charge on behalf of PG&E Energy Recovery Funding LLC. This charge does not belong to PG&E.

Gas Procurement: This is the purchase price for natural gas and is set on a monthly basis.

This Bill is Now Due And Payable

Options for paying your bill

- **Online at www.pge.com**
- **Automatic Payment Service:** Sign up to authorize automatic payments sent from your bank account each month.
- **By mail:** Send your payment along with this payment stub in the envelope provided.
- **By Star debit card:** Call 1-866-707-0682 at any time. (Our independent service provider charges a fee for each transaction.)
- **At a PG&E payment center or local office:** To find a payment center or local office near you, please visit www.pge.com or call 1-800-743-5000. Please bring a copy of your bill with you.

Has your billing contact information changed?

change my mailing address
 change my telephone number for billing contact
 change my primary email

Account number: 123456789-0

First name _____ Last name _____
Address _____ Apt.# _____
City _____ State _____ ZIP code _____
Phone _____ Email _____

BPP customers reported a stronger dislike for the important definitions.

BILL REDESIGN ONLINE RESEARCH | RESULTS OF RESEARCH

travisresearch

31

SB_GT&S_0850423



ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1023456789-0
Statement Date: Mar 16, 2011
Due Date: Apr 6, 2011

Details of Electricity Charges

Feb 12, 2011 to Mar 14, 2011 (31 billing days)

Service For: 1234 Main Street
Service ID: 9087654321
Rate Schedule: E1 Standard Service-Residential

Feb 12, 2011 – Feb 28, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	166.6000 kWh				
Tier 1 Usage (up to Baseline)	166.6000 kWh @ \$0.12233				\$ 20.38
Tier 2 Usage (101%-130% of Baseline)	49.9800 kWh @ \$0.13907				\$ 6.95
Tier 3 Usage (131%-200% of Baseline)	36.7748 kWh @ \$0.28011				\$10.30
Energy Commission Tax					\$ 0.07
Utility Users Tax (7.500%)					\$ 2.82

Mar 1, 2011 – Mar 14, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	137.2000 kWh				
Tier 1 Usage (up to Baseline)	137.2000 kWh @ \$0.12233				\$ 16.78
Tier 2 Usage (101%-130% of Baseline)	41.1600 kWh @ \$0.13907				\$ 5.72
Tier 3 Usage (131%-200% of Baseline)	30.2852 kWh @ \$0.29385				\$ 8.90
Energy Commission Tax					\$ 0.06
Utility Users Tax (7.500%)					\$ 2.36

Total Electricity Charges \$74.35

Service Information

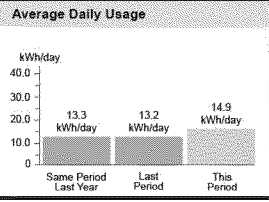
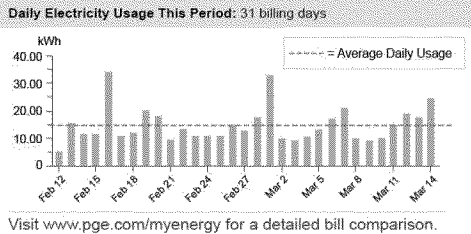
Meter #	1098765432
Current Meter Reading	4,290
Prior Meter Reading	3,828
Difference	462
Meter Constant	1
Total Usage	462 kWh
Serial	F
Rotating Outage Block	5M

Electricity Charges Breakdown

Generation	\$ 22.93
Transmission	\$ 6.41
Distribution	\$ 23.73
Public Purpose Programs	\$ 7.07
Nuclear Decommissioning	\$ 0.31
DWR Bond Charge	\$ 2.33
Ongoing CTC	\$ 4.07
Energy Cost Recovery Amount	\$ 2.19
Taxes	\$ 5.31

Total Electricity Charges \$ 74.35

Additional Bill Messages



ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1023456789-0
Statement Date: Mar 16, 2011
Due Date: Apr 6, 2011

Details of Gas Charges

Feb 12, 2011 to Mar 14, 2011 (31 billing days)

Service For: 1234 Main Street
Service ID: 9087654321
Rate Schedule: G1 Standard Service-Residential

Feb 12, 2011 – Feb 28, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	30.43000 Therms				
Tier 1 Usage (up to Baseline)	30.43000 Therms @ \$1.06707				\$32.47
Tier 2 Usage (over Baseline)	34.82807 Therms @ \$1.32646				\$46.20
Winter Gas Savings Program Credit					-\$ 50.17
Gas PPP Surcharge (\$ 0.08400/Therm)					\$ 5.47
Utility Users Tax (7.500%)					\$ 2.14

Mar 1, 2011 – Mar 14, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	25.06000 Therms				
Tier 1 Usage (up to Baseline)	25.06000 Therms @ \$0.96776				\$ 24.25
Tier 2 Usage (over Baseline)	28.68194 Therms @ \$1.22715				\$ 35.20
Gas PPP Surcharge (\$0.08400/Therm)					\$ 4.52
Utility Users Tax (7.500%)					\$ 4.46

Total Gas Charges \$104.55

The sum of your gas charges may not equal the amount of your Total Gas Charges due to rounding.

Service Information

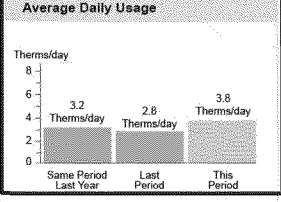
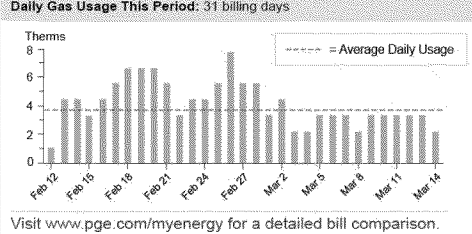
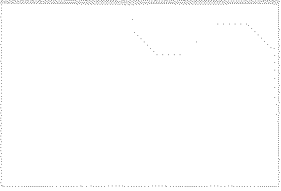
Meter #	1234512345
Current Meter Reading	3,017
Prior Meter Reading	2,901
Difference	116
Multiplier	1.028703
Total Usage	119 Therms
Serial	F

Gas Charges Breakdown

PG&E's gas procurement costs for this billing cycle are:	
(Rate Schedule G-CP)	(\$/Therm)
Feb 12, 2011 – Feb 28, 2011	\$0.63475
Mar 1, 2011 – Mar 14, 2011	\$0.53544

See page 2 for definitions.

Additional Bill Messages



BPP customers responded more favorably to the Average Daily Usage graph – both gas and electricity



(Page 1)

- There was a more positive response from CARE customers to the Savings Alert area on page 1 that shows their precise CARE discount.



(Page 3)

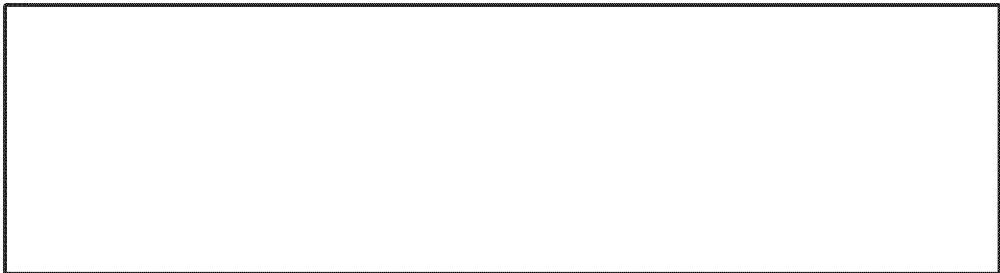
- The Details of Electricity Charges, which shows the CARE discount as a line item, also received a more positive response from CARE customers (page 3).

Details of Electricity Charges					
Feb 12, 2011 to Mar 14, 2011 (31 billing days)					
Service For: 1234 Main Street					
Service ID: 9087654321					
Rate Schedule: E1 Standard Service-Residential with CARE					
Feb 12, 2011 – Feb 28, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	166.60000 kWh				
Tier 1 Usage (up to Baseline)	166.60000 kWh @ \$0.12233				\$20.38
Tier 2 Usage (101%-130% of Baseline)	49.98000 kWh @ \$0.13907				\$ 6.95
Tier 3 Usage (131%-200% of Baseline)	116.62000 kWh @ \$0.28011				\$32.67
Tier 4 Usage (201%+ of Baseline)	83.96000 kWh @ \$0.38978				\$32.73
CARE Discount					-\$54.91
Energy Commission Tax					\$ 0.12
Utility Users Tax (7.500%)					\$ 2.62
Mar 1, 2011 – Mar 14, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	137.20000 kWh				
Tier 1 Usage (up to Baseline)	137.20000 kWh @ \$0.12233				\$16.78
Tier 2 Usage (101%-130% of Baseline)	41.16000 kWh @ \$0.13907				\$ 5.72
Tier 3 Usage (131%-200% of Baseline)	96.04000 kWh @ \$0.29385				\$28.22
Tier 4 Usage (201%+ of Baseline)	69.14000 kWh @ \$0.40352				\$27.90
CARE Discount					-\$47.49
Energy Commission Tax					\$ 0.10
Utility Users Tax (7.500%)					\$ 2.36
Total Electricity Charges					\$74.35



(Page 1)

- The “Account Details” area on page 1 of the BPP bill garnered a favorable reaction from BPP customers.





(Page 1 of 3)

(Page 2 of 3)

PG&E ENERGY STATEMENT
 www.pge.com/MyEnergy

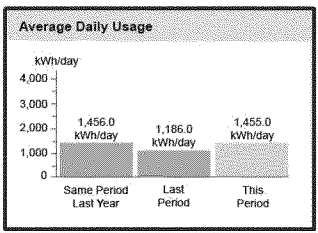
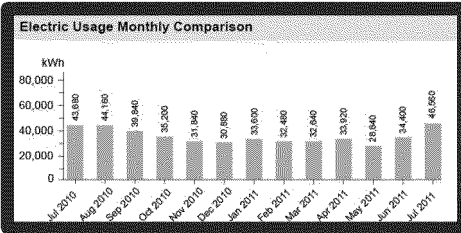
Account No: 1023456789-0
 Statement Date: Jul 20, 2011
Due Date: Aug 8, 2011

Service For:
 Business Customer
 1234 Corporate Parkway
 Anytown, CA 12345

Your Account Summary

Amount Due on Previous Statement	\$6,105.89
1 Payment(s) Received Since Last Statement	- \$6,105.89
Past Due Amount	\$ 0.00
Current Electricity Charges	\$8,244.85
Additional Charges/Credits	\$ 0.00
Total Amount Due by Aug 8, 2011	\$8,244.85

Questions about your bill?
 24 hours per day, 7 days per week
 Phone: 1-800-468-4743 or
 Email: info@pge.com



For details of charges, taxes and surcharges, daily usage details from your SmartMeter, and additional payment options, you may access your account online at www.pge.com/MyEnergy.

Important Messages
 Be winter-wise! Cold weather can triple heating use; fewer daylight hours can increase lighting use by a third. Spending more time indoors and billing periods with 5 weekends can also cause higher bills. To save money, set heaters lower and turn lights off when not needed.

Please return this portion with your payment. Thank you. No staples, please.

Agricultural customers responded more negatively to the QR code.

Account Number: **1023456789-0** Due Date: **Aug 8, 2011** Total Amount Due: **\$8,244.85** Amount Enclosed: **\$**

1909.22.520.114921.1 AT 0.308
 BUSINESS CUSTOMER
 1234 CORPORATE PARKWAY
 ANYTOWN, CA 12345



PG&E
 BOX 997300
 SACRAMENTO, CA 95899-7300

99901234567890100000XXXXXX000000XXXXXX



PG&E ENERGY STATEMENT
 www.pge.com/MyEnergy

Account No: 1023456789-0
 Statement Date: Jul 20, 2011
Due Date: Aug 8, 2011

Important Phone Numbers – 24 hours per day, 7 days per week

Customer Service (English; Relay Calls Accepted) 1-800-743-5000
TDD/TTY (Speech/Hearing Impaired) 1-800-652-4712

Servicio al Cliente en Español (Spanish) 1-800-660-6789
 XXXXXXXXXXXXXXXX (Chinese) 1-800-893-9555
 XXXXXXXXXXXXXXXX (Vietnamese) 1-800-298-8438
 Other Languages 1-800-743-5000

Smarter Energy Line 1-800-933-9555
 Energy Theft Hotline 1-800-854-6250
 To Request a Claim Form 1-800-743-5000

Rules and rates
 You may be eligible for a lower rate. To find out about our optional rates or for a complete list of our rules and rates, visit www.pge.com or call 1-800-743-5000.

If you believe there is an error on your bill, email info@pge.com, or call 1-800-743-5000 for an explanation. If you are not satisfied with our response, contact the California Public Utilities Commission (CPUC), Consumer Affairs Branch, 505 Van Ness Avenue, San Francisco, CA 94102, 1-800-649-7570 or 415-703-2032 (TDD/TTY).

To avoid having service turned off while you wait for a CPUC decision, enclose a deposit check (payable to the CPUC) for the amount owed. The CPUC will only accept deposits for matters that relate directly to billing accuracy. If it is not possible for you to pay your deposit, you must advise the CPUC. PG&E can not turn off your service for nonpayment while it is under review by the CPUC; however, you must continue to pay your current charges to keep your service turned on.

If you are not able to pay your bill, call PG&E to discuss how we can help. You may qualify for reduced rates under PG&E's CARE program or other special programs and agencies may be available to assist you. You may qualify for PG&E's Energy Partners Program which is an energy efficiency program for income-qualified residential customers.

Important definitions
Rotating outage block: Customers are grouped into "blocks" based on their location. In the event that the California Independent System Operator declares a power emergency due to an energy shortage, certain blocks may experience power supply interruptions based on their location. Rotating outage blocks are subject to change without advance notice due to operational conditions.
Baseline allowance: All residential customers are given a baseline allowance, which represents a percentage of average customer usage during summer and winter months. Your total allowance is your assigned usage level based on the

climate where you live, the current season and your heat source. The energy that you use within your allowance is charged at the lowest rate (Tier 1). The purpose of your baseline is to provide for basic needs at an affordable price and to encourage conservation.

Gas meter multiplier: Converts the cubic feet of gas, as measured by your gas meter, to therms of energy and adjusts for variances in the heat content of gas.

Electric meter constant: Converts the difference in your meter readings to the actual electricity used.

Public Purpose Program (PPP): Funds collected to pay for assistance programs for low-income customers and energy-efficiency programs.

Competition Transition Charge (CTC): The cost of certain purchased power agreements as well as a portion of electric industry restructuring implementation costs as authorized by the CPUC.

DWR bond charge: Recovers the cost of bonds issued to finance a portion of the historic cost of power purchased by California Department of Water Resources (DWR) to serve electric customers. DWR bond charges are collected on behalf of DWR and do not belong to PG&E.

DWR power charge: Included for the portion of your energy usage provided by the Department of Water Resources. DWR receives \$0.0875 per kWh it provides.

Energy Cost Recovery Amount (ECRA): These charges are imposed pursuant to law. One of these charges is the Dedicated Rate Component (DRC), which is \$0.00519 per kWh. The right to receive DRC revenues has been sold to a special purpose entity, PG&E Energy Recovery Funding LLC, and PG&E is collecting this charge on behalf of PG&E Recovery Funding LLC. This charge does not belong to PG&E.

Gas Procurement: This is the purchase price for natural gas and is set on a monthly basis.

This Bill is Now Due And Payable

- Options for paying your bill**
- **Online at www.pge.com**
 - **Automatic Payment Service:** Sign up to authorize automatic payments sent from your bank account each month.
 - **By mail:** Send your payment along with this payment stub in the envelope provided.
 - **By Star debit card:** Call 1-866-707-0682 at any time. (Our independent service provider charges a fee for each transaction.)
 - **At a PG&E payment center or local office:** To find a payment center or local office near you, please visit www.pge.com or call 1-800-743-5000. Please bring a copy of your bill with you.

Has your billing contact information changed?

- change my mailing address
 change my telephone number for billing contact
 change my primary email

Account number: 123456789-0

First name _____ Last name _____

Address _____ Apt # _____

City _____ State _____ ZIP code _____

Phone _____ Email _____



(Page 3 of 3)



ENERGY STATEMENT
www.pge.com/MyEnergy

Account No: 1023456789-0
Statement Date: Jul 20, 2011
Due Date: Aug 8, 2011

Details of Electricity Charges
Jun 17, 2011 to Jul 18, 2011 (32 billing days)
Service For: 1234 Corporate Parkway
Service ID: 9087654321
Rate Schedule: A10SX Medium General Demand-Metered Service – TOU

Service Information

Meter #	P29382
Current Meter Reading	17,935
Prior Meter Reading	17,544
Difference	291
Meter Constant	160
Total Usage	46,560 kWh
Serial	S
Rotating Outage Block	50

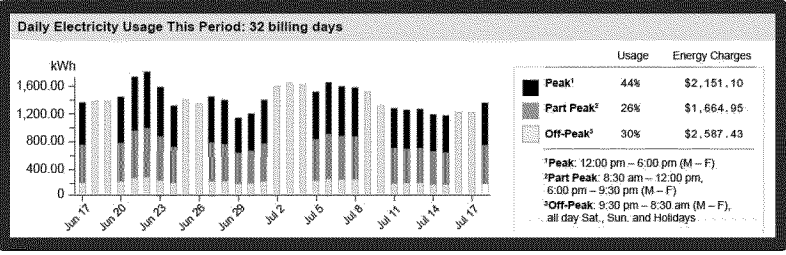
Jun 17, 2011 – Jun 19, 2011				
Customer Charge	3 days	@	\$ 3.94251	\$ 11.83
Demand Charge*	154.0 kW	@	\$11.05000	\$ 159.53
Energy Charges				
Peak	1,290.0 kWh	@	\$ 0.15633	\$ 201.67
Part Peak	1,140.0 kWh	@	\$ 0.13692	\$ 156.09
Off-Peak	1,935.0 kWh	@	\$ 0.12536	\$ 242.57
Taxes				\$ 1.27
Jun 20, 2011 – Jul 18, 2011				
Customer Charge	29 days	@	\$ 3.94251	\$ 114.33
Demand Charge*	154.0 kW	@	\$11.05000	\$1,542.17
Energy Charges				
Peak	12,470.0 kWh	@	\$ 0.15633	\$1,949.44
Part Peak	11,020.0 kWh	@	\$ 0.13692	\$1,508.86
Off-Peak	18,705.0 kWh	@	\$ 0.12536	\$2,344.86
Taxes				\$ 12.24
Total Electricity Charges				\$8,244.85

*Demand charges are prorated for the number of days in each rate period.

Electricity Charges Breakdown

Generation	\$4,249.87
Transmission	\$ 714.46
Distribution	\$1,736.14
Public Purpose Programs	\$ 683.03
Nuclear Decommissioning	\$ 30.73
DWR Bond Charge	\$ 235.12
Ongoing CTC	\$ 362.24
Energy Cost Recovery Amount	\$ 219.76
Taxes	\$ 13.51
Total Electricity Charges	\$8,244.85

Messages



SUGGESTIONS FOR IMPROVEMENT/INFORMATION MISSING

Contains confidential information, provided pursuant to PUC § 583



- No suggestions for improvement stood out for the new bill, with a plurality of respondents indicating:
 - The bill was fine as it is
 - There was nothing they would suggest to make it more appealing.
- Over half reported there is nothing that they feel is missing from the bill.
- Although small on an absolute basis, those who did offer suggestions were somewhat split between those who recommended adding information and those who preferred limiting the bill to essential information.

Q.14 "In your opinion, what could be done to this bill to make it more appealing overall?"
 Q.19 "What, if any, information do you feel is **MISSING** or **YOU WOULD LIKE TO SEE IN THE BILL** that is not there currently?"

* Less than .5%

Mentions of less than 3% of both Residential and Commercial not shown.

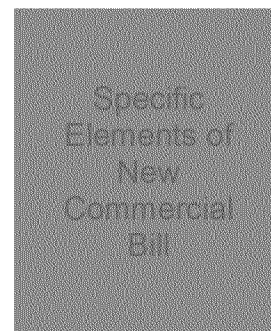
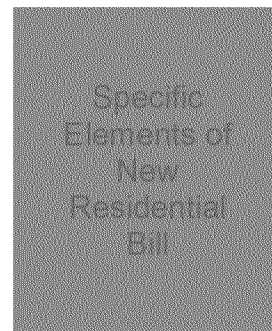
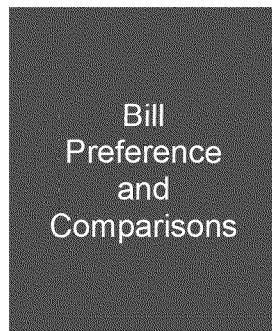
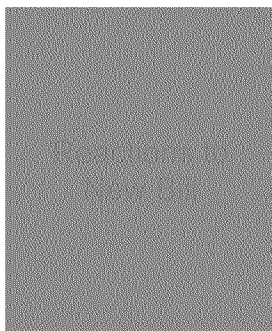
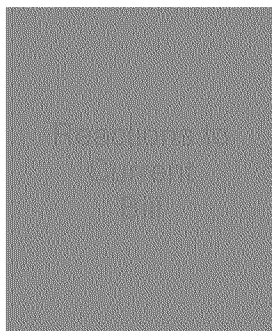
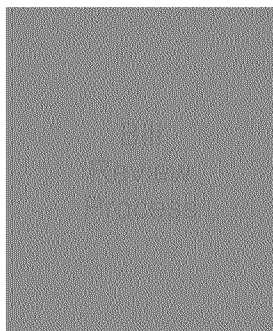
Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

	(A) Residential (n=581) 	(B) Commercial (n=565)
Suggestions for Improvement		
Fine as is/looks good as is	24%	23%
More information/details	8%	6%
More concise/essential information only	6%	5%
Finding information	5%	7%
More clearly explain tier/baseline information	5% B	*
Different order of information	4%	5%
Improve graphs	3%	4%
Larger print/font	3%	3%
Make bill less busy/less crowded/ciuttered	3%	3%
More clearly explain charges/breakdown	2%	4% A
Eliminate/less specific information	2%	5% A
Nothing/no suggestions	14%	18%
Don't know/no answer	9% B	5%
Missing Information		
Usage-related information	8%	7%
Charge-related information	7%	8%
Fine as is	7%	4%
General usage/charges-related information	6%	8%
Like the new bill/design/changes	2%	5% A
None/nothing	54%	52%
Don't know/no answer	11% B	7%

Q.14/19
 T.87/110

DETAILED FINDINGS



BILL PREFERENCE BETWEEN CURRENT AND NEW BILL

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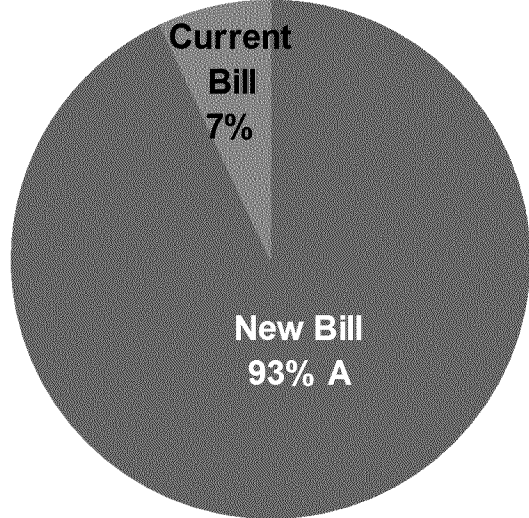
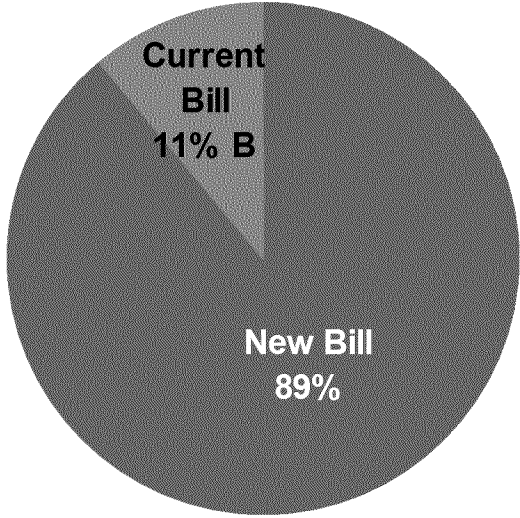


- Both groups clearly favored the new bill over the current, with a slightly stronger preference expressed by Commercial customers.

(A)
Residential
(n=581)



(B)
Commercial
(n=565)

Q.8. "Now that you have seen both PG&E bills, which **ONE BILL** do you **prefer**?"

Base: Total Residential: (n=581); Banner 1A
Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.8
T.68

- Among those who favored the **new** bill, their primary reasons were its:
 - User-friendliness (format, ease of read, clear presentation)
 - Graphs/charts.
- Of the fewer who preferred the **current** bill, the majority also mentioned its user-friendliness, followed by:
 - A **lack** of graphs/charts
 - Familiarity with the bill.

	RESIDENTIAL		COMMERCIAL	
	(A) Current Bill (n=67) ❖	(B) New Bill (n=514)	(C) Current Bill (n=47) ❖	(D) New Bill (n=518)
User-Friendliness	66%	56%	53%	71% C
Format/layout	41% B	24%	21%	40% C
Easier to read/scan/find details	25%	32%	12%	38% C
Layout provides understanding/clarity	18%	19%	16%	20%
Graphs/Charts	20%	47% A	13%	41% C
Less/no graphs/charts	14% B	--	12% D	--
Graph/charts (general)	6%	14%	--	11%
Graphs provide understanding/clarity	2%	18% A	--	16% C
Graphs/charts are clear/quick/easy to read/understand	--	7% A	--	7%
Graphs/charts that show/compare daily usage	--	4%	--	2%
Graphs/charts that show/compare monthly usage	--	5%	4%	4%
Graphs/charts that show/compare usage (general)	--	10% A	1%	10%
Lot of/Good Information/Details	5%	25% A	3%	28% C
Lot of/more information/more details (general)	2%	10%	--	9%
Usage-related	1%	10% A	1%	17% C
Aesthetics	2%	7%	--	9%
Better looking/more aesthetically pleasing/better visual appeal	2%	5%	--	8%
Familiar with it/used to it	16% B	--	28% D	*
Satisfied with current bill/don't need any changes	5% B	--	10% D	--
Don't know/no answer	8% B	2%	23% D	1%

Q.8. "Why do you prefer this bill over the other?"

* Less than .5%.

Multiple responses allowed. Mentions of less than 3% for both Residential and Commercial not shown.

Base: Total Residential: (n=581); Banner 1A/B
 Total Commercial: (n=565); Banner 1C/D



Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

❖ Caution: Small base.

Q.9
T.69



- Across Residential and Commercial respondents, over four out of five preferred and gave top scores to the new bill, significantly more than those who did the same for the current bill.

	RESIDENTIAL (n=581) 		COMMERCIAL (n=565) 	
	(A) Current Bill	(B) New Bill	(C) Current Bill	(D) New Bill
Overall Preference	11%	89% A	7%	93% C
Top-3-Box*				
Overall Impressions	48%	82% A	42%	85% C
Overall Visual Appeal	44%	81% A	42%	86% C
Ease of Read	59%	81% A	54%	84% C
Finding Most Important Elements	65%	84% A	58%	87% C
Understanding Bill Overall	56%	81% A	49%	81% C

Q.6.1/7.1 "What are your **OVERALL IMPRESSIONS** of this bill?"
 Q.6.2/7.2 "What is your opinion of the **OVERALL VISUAL APPEAL** of this bill?"
 Q.6.3a/7.3a "In your opinion, how easy or difficult is it to **READ** this bill overall?"

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U



* Rated 8-10 on 10-point scale: 10="Extremely Favorable"/"Outstanding"/"Extremely Easy"; 1="Not Favorable At All"/"Extremely Poor"/"Extremely Difficult."

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.6.1/6.2/6.3a/7.1/7.2/7.3a/8
 T.68/0116_1



- Respondents from both groups reported greater ease in finding both the most important elements and most of the specific elements on the new bill than they did on the current bill.

	TOP-3-BOX*			
	RESIDENTIAL (n=581) 		COMMERCIAL (n=565) 	
	(A) Current Bill	(B) New Bill	(C) Current Bill	(D) New Bill
Finding Most Important Elements	65%	84% A	58%	87% C
Finding Specific Elements				
Total amount due	91%	93%	91%	96% BC
Payment due date	87%	93% A	88%	94% C
Account number	87%	92% A	85%	94% C
1-800 customer service number	76%	89% A	80%	90% C
PG&E website address	60% C	85% A	52%	83% C
Discounts and rebates (CARE only)	47%	74% A	N/A	N/A
Remaining account balance (BPP only)	83%	89%	N/A	N/A

Q.6.3b/7.3b "In your opinion, how easy or difficult is it to **FIND THE MOST IMPORTANT INFORMATION** on this bill?"
 Q.6.4a-g/7.4a-g "Please rate the ease of **FINDING** each of the bill elements listed below."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

* Rated 8-10 on 10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.6.1/6.2/6.3a/7.1/7.2/7.3a
 T.0116_1

BILL COMPARISONS – CLARITY AND EASE OF UNDERSTANDING BILL

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- When elements were shown in both the current and new bills, respondents found them easier to understand in the new bill.

	TOP-3 BOX*			
	RESIDENTIAL (n=581) 		COMMERCIAL (n=565) 	
	(A) Current Bill	(B) New Bill	(C) Current Bill	(D) New Bill
Understand Bill Overall	56% C	81% A	49%	81% C
Page 1				
Account summary	84% C	88% A	78%	91% C
Information about CARE discount (CARE only)	53%	76% A	N/A	N/A
Total amount due (BPP only)	93%	N/A	N/A	N/A
Remaining account balance (BPP only)	83%	N/A	N/A	N/A
Monthly usage comparison graphs (RES and CARE only)	N/A	88%	N/A	91%
Important messages	N/A	82%	N/A	78%
Average daily usage graph	N/A	N/A	N/A	89%
Page 2				
Electric industry/important definitions	49% C	73% A	40%	73% C
Information about/options for paying your bill	63% C	79% A	56%	79% C
Helpful/important phone numbers	69%	83% A	65%	86% C
Rules and rates	N/A	72%	N/A	73%
Page 3-4				
Gas account detail	64%	84% A	N/A	N/A
Electric account detail	63% C	84% A	51%	81% C
Service information	N/A	81%	N/A	80%
Electricity charges breakdown	N/A	N/A	N/A	80%
Daily electricity/gas usage graph	N/A	85%	N/A	86%
Average daily usage graph	N/A	85%	N/A	N/A
Tiered usage information	N/A	76%	N/A	N/A
Peak usage table	N/A	N/A	N/A	81%

Q.6.3c. "In your opinion, how easy or difficult is it to **UNDERSTAND** this bill overall?"

Q.6.5.1-6.5.4/7.5.1-7.5.5 "How **CLEAR** and **EASY TO UNDERSTAND** do you find each of the bill elements listed below?"

* Rated 8-10 on 10-point scale: 10="Extremely Easy"; 1="Extremely Difficult."

Base: Total Residential: (n=581); Banner 1A
Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.



Q.6.3c/6.5.1-6.5.4/7.3c/7.5.1-7.5.5
T. 0116_1

BILL COMPARISONS – EFFECTIVENESS OF BILL IN COMMUNICATING USAGE AND PROMPTING THOUGHTS ABOUT USAGE

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- Respondents also perceived the new bill to perform better than the current bill on both communicating monthly usage and prompting thoughts about the amount of energy used each month.
- As mentioned previously, more Residential than Commercial customers considered the current bill more effective on both these measures.

	TOP-3 BOX*			
	RESIDENTIAL (n=581) 		COMMERCIAL (n=565) 	
	(A) Current Bill	(B) New Bill	(C) Current Bill	(D) New Bill
Communicating Usage	68% C	86% A	57%	88% C
Prompting Thoughts About Usage	51% C	83% A	41%	83% C

Q.6.6/7.6 "In your opinion, how effective is this bill in communicating your monthly energy usage?"
 Q.6.7/7.7 "How effective is the bill in getting you to think about the amount of energy you use each month?"

* Rate 8-10 on 10-point scale: 10="Extremely Effective"; 1="Not At All Effective."

Base: Total Residential: (n=581); Banner 1A
 Total Commercial: (n=565); Banner 1U

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.



Q.6.6/6.7/7.6/7.7
 T. 0116_1

SUMMARY OF SUBGROUP FINDINGS ON KEY MEASURES – CURRENT BILL

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- There were no differences among Residential or Commercial subgroup findings on key measures of the current bill, with the exception of more Small/Medium Business than Large Business/Agricultural respondents reporting a greater ease of finding the bill elements they consider most important.
- As shown in the Detailed Findings, more overall Residential than Commercial customers favored the current bill on:
 - Overall preference
 - Ease of understanding the bill
 - Effectiveness of communicating usage and prompting thoughts about energy usage.

	Residential 				Commercial 			
	(A) Total (n=581)	(B) CARE (n=151)	(C) BPP (n=151)	(D) All Others (n=279)	(E) Total (n=565)	(F) Small/ Medium (n=304)	(G) Large Comm/AG (n=109)	(H) Small AG (n=152)
Overall preference	12% E	13%	11%	11%	8%	7%	12%	8%
Top-3 Box*								
Overall impressions	48%	50%	46%	48%	42%	42%	44%	34%
Overall visual appeal	45%	46%	39%	44%	42%	42%	42%	36%
Ease of read	59%	62%	58%	58%	54%	55%	47%	47%
Ease of finding most important information	65%	65%	60%	65%	58%	60% G	48%	51%
Ease of understanding bill overall	56% E	56%	60%	55%	49%	50%	44%	43%
Effectiveness of communicating usage	68% E	66%	68%	69%	57%	58%	57%	56%
Effectiveness of prompting thoughts about usage	51% E	52%	56%	50%	41%	41%	40%	41%

* Rated 8-10 on 10-point scale (various scales)

Base: Total Residential: (n=581); Banner 1A-D
Total Commercial; (n=565); Banner 2A-D

Letter next to data point means significantly higher than indicated group at the 95% level of confidence: test A/E, B/C/D, F/G/H

Q.6.1/6.2/6.3a-c/6.6-6.7/8
T.16-20/35-36/68

SUMMARY OF SUBGROUP FINDINGS ON KEY MEASURES – NEW BILL

Contains confidential information, provided pursuant to PUC § 553



- There were no differences among Residential or Commercial subgroup findings on key measures of the new bill, with the exception of slightly fewer CARE customers assigning top ratings on ease of reading.
- As shown in the Detailed Findings, at over nine out of ten, more overall Commercial than Residential customers favored the new bill.

	Residential				Commercial			
	(A) Total (n=581)	(B) CARE (n=151)	(C) BPP (n=151)	(D) All Others (n=279)	(E) Total (n=565)	(F) Small/ Medium (n=304)	(G) Large Comm/AG (n=109)	(H) Small AG (n=152)
Overall preference	89%	87%	89%	89%	92% A	93%	88%	92%
Top-3 Box*								
Overall impressions	82%	80%	86%	82%	85%	85%	83%	85%
Overall visual appeal	81%	81%	83%	81%	86%	86%	85%	84%
Ease of read	82%	76%	83%	84% B	84%	84%	87%	84%
Ease of finding most important information	84%	81%	86%	85%	87%	87%	86%	88%
Ease of understanding bill overall	81%	79%	85%	81%	81%	82%	80%	77%
Effectiveness of communicating usage	85%	85%	89%	85%	88%	88%	84%	89%
Effectiveness of prompting thoughts about usage	83%	85%	83%	82%	83%	83%	77%	83%

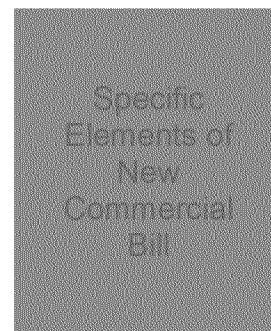
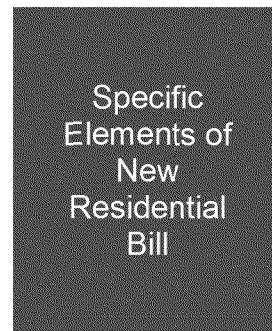
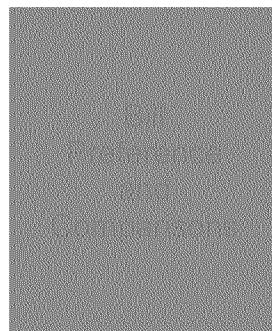
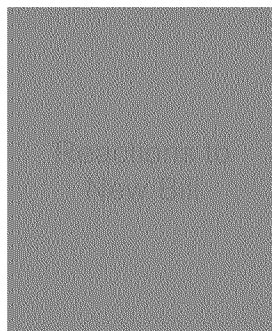
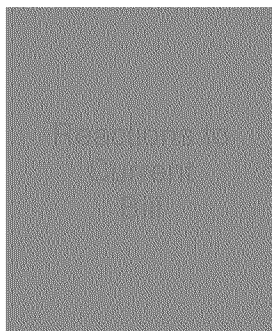
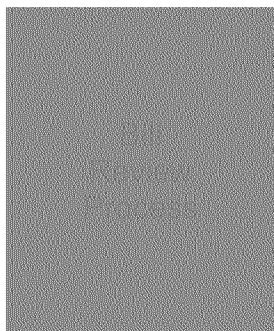
* Rated 8-10 on 10-point scale (various scales)

Base: Total Residential: (n=581); Banner 1A-D
Total Commercial; (n=565); Banner 2A-D

Letter next to data point means significantly higher than indicated group at the 95% level of confidence: test A/E, B/C/D, F/G/H

Q.7.1/7.2/7.3a-c/7.6-7.7/8
T.37-41/66-68

DETAILED FINDINGS



Respondents were shown a series of images and asked to indicate a preference. The following pages detail the results of this exercise.

Image P

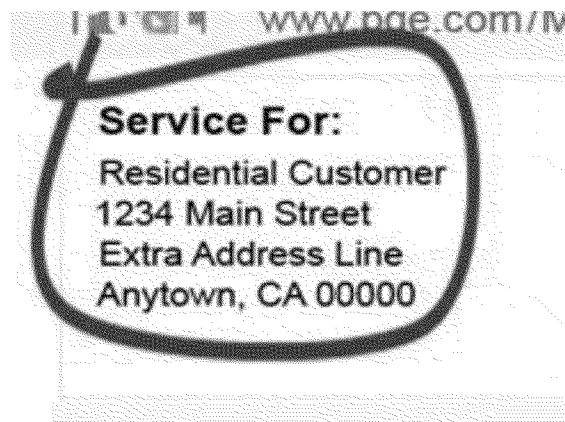
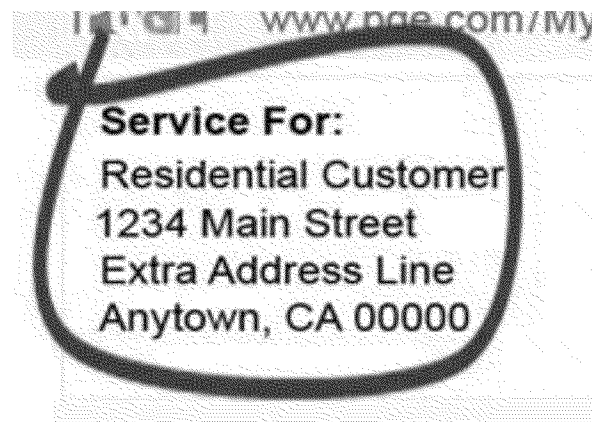


Image L



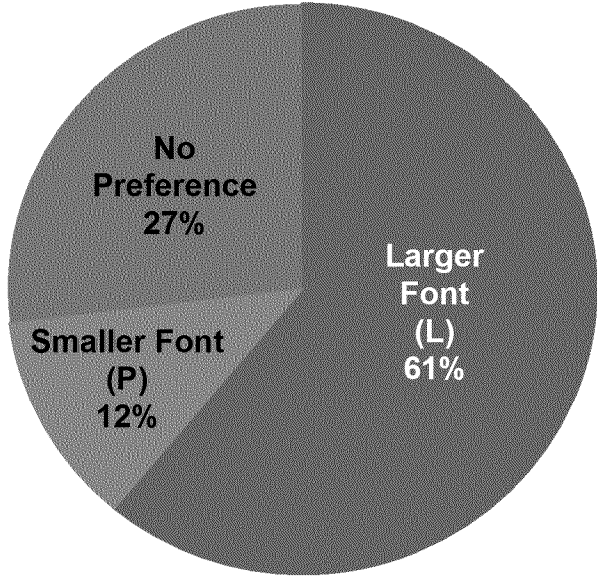
As illustrated on the following page:

- The majority of Residential customers preferred the larger font (L) in the “Service For” section of the new bill
- However, they were mixed on whether or not they were willing to reduce font size on other areas of the page in order to have the larger font in this section.

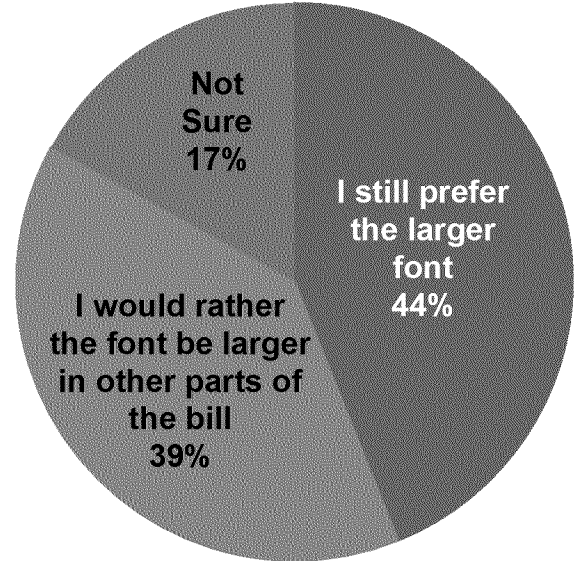
Q.15.1/15.1a
T.88/89



Font Size Preference



Sacrifice Font Size in Other Parts of Bill for "Service For"



Q.15.1 "In the 'Service For' portion of the bill, the font size is larger for one image and somewhat smaller for the other. Which of these two do you prefer?"
 Q.15.1a "Would you still prefer the larger font in the 'Service For' area of the bill if it meant reducing the font size in other parts of the bill?"

Base: Total Residential: (n=581); Banner 1A

Q.15.1/15.1a
T.88/89

SPECIFIC ELEMENTS OF NEW RESIDENTIAL BILL
VERTICAL VS. HORIZONTAL USAGE TIERS

Contains confidential information, provided pursuant to PUC § 583



Image B

Rate Schedule: E1 Standard Service-Residential

Feb 12, 2011 – Feb 28, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	100,0000 kWh				
Tier 1 Usage (up to Baseline)	100,0000 kWh @ \$0.12233				\$ 20.38
Tier 2 Usage (101%-130% of Baseline)	49,9800 kWh @ \$0.13007				\$ 6.95
Tier 3 Usage (131%-200% of Baseline)	36,7748 kWh @ \$0.28011				\$10.30
Energy Commission Tax					\$ 0.07
Utility Users Tax (7.500%)					\$ 2.82

Image T

Rate Schedule: E1 Standard Service-Residential

Feb 12, 2011 – Feb 28, 2011	Your Usage is in Tier 3
Baseline Allowance	100,0000 kWh
Tier 1 Usage (up to Baseline)	100,0000 kWh @ \$0.12233 \$ 20.38
Tier 2 Usage (101%-130% of Baseline)	49,9800 kWh @ \$0.13007 \$ 6.95
Tier 3 Usage (131%-200% of Baseline)	36,7748 kWh @ \$0.28011 \$ 10.30
Energy Commission Tax	\$ 0.07
Utility Users Tax (7.500%)	\$ 2.82

Image V

Rate Schedule: E1 Standard Service-Residential

Feb 12, 2011 – Feb 28, 2011	Your Tier Usage
Baseline Allowance	100,0000 kWh
Tier 1 Usage (up to Baseline)	100,0000 kWh @ \$0.12233
Tier 2 Usage (101%-130% of Baseline)	49,9800 kWh @ \$0.13007
Tier 3 Usage (131%-200% of Baseline)	36,7748 kWh @ \$0.28011
Energy Commission Tax	\$ 0.07
Utility Users Tax (7.500%)	\$ 2.82

As illustrated on the following page:

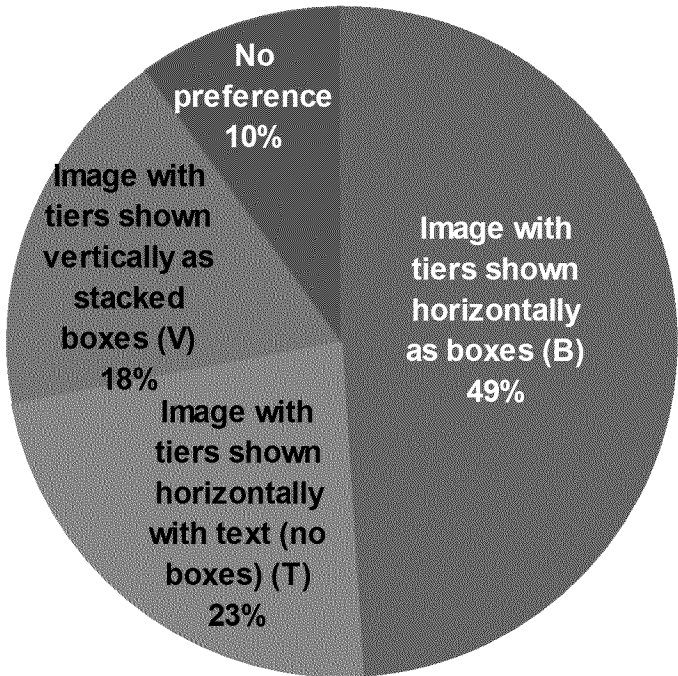
- Of the three presentations of tiered usage, nearly half of Residential respondents preferred Image B that shows the information presented horizontally as boxes.
 - Among both those who favored this version (B) and Image T, ease of reading/scanning topped the list of reasons for their preference, followed by ease of understanding (top reason among those who favored Image V).

Q.15.2/15.2a
 T.90/91x



Tiered Usage Information Preference

Base: Total Residential (n=581)



Reasons for Preference*

Base: Prefer Image Indicated

	(A) Prefer B (n=284)	(B) Prefer T (n=132)	(C) Prefer V (n=107)
Easier to read/scan	57% C	46% C	28%
Easier to understand	31%	37%	40%
User-friendly format/layout	7%	3%	4%
General format	6%	5%	14% AB
Simpler/simplified/basic	4%	3%	3%
Informative	3%	4%	5%
Don't know/no answer	8%	8%	7%

Q.15.2 "Here are three possible ways to present tiered usage information on Page 3. Which of these do you prefer?"

Q.15.2a "Why do you prefer this version?"

* Mentions of less than 3% (both columns) not shown.

Base: Total Residential: (n=581); Banner 1A

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.15.2/15.2a
T.90/91x

SPECIFIC ELEMENTS OF NEW RESIDENTIAL BILL HISTORICAL VS. AVERAGE DAILY USAGE

Contains confidential information, provided pursuant to PUC § 583



Image H

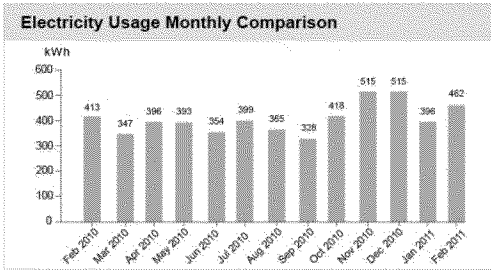
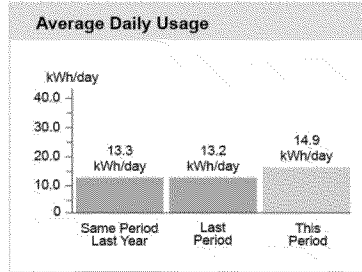
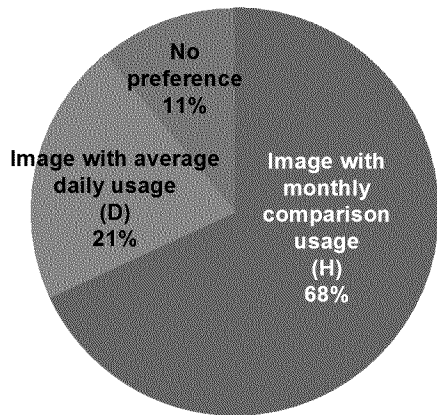


Image D

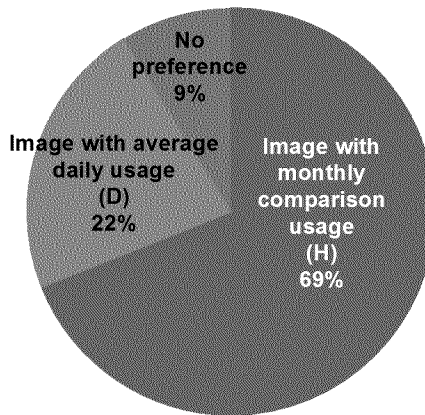


- Nearly seven out of ten...
 - preferred the graph showing comparative monthly usage (H) over average daily usage (D).
 - found the monthly comparative information more useful.
- Regardless of the graph favored, the leading reason for preference was the comparison of time periods that the exhibit provides.

Graph Preference



More Useful Information



Reasons Perceive Graph More Useful*
Base: Prefer Image Indicated

	(A) Select H (n=405)	(B) Select D (n=126)
Comparison of time periods	46%	38%
User-friendliness	19%	19%
More useful for tracking	19%	19%
Reasons criticizing other graph	12%	12%
More information	10%	3%
More representative of usage	4%	5%
Like both images/want both	3%	6%
Don't know/no answer	5%	11% A

Q.15.3 "One of these images show historical usage and the other average daily usage. Which of these two do you prefer?"

Q.15.3a "Still thinking about the same images, which do you believe provides more useful information to you?"

Q.15.3b "Why do you find this information more useful?"

* Mentions of less than 3% (both columns) not shown.

Base: Total Residential: (n=581); Banner 1A

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.15.3/15.3a/15.3b
T.94/95/96x

SPECIFIC ELEMENTS OF NEW RESIDENTIAL BILL
FORCE ROUNDING VS. MORE DIGITS

Contains confidential information, provided pursuant to PUC § 583



Image F

Feb 12, 2011 – Feb 28, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	166.6 kWh				
Tier 1 Usage (up to Baseline)	166.6 kWh @ \$0.12233				\$ 20.38
Tier 2 Usage (101%-130% of Baseline)	49.9 kWh @ \$0.13907				\$ 6.95
Tier 3 Usage (131%-200% of Baseline)	36.7 kWh @ \$0.28011				\$10.30
Energy Commission Tax					\$ 0.07
Utility Users Tax (7.500%)					\$ 2.82

Image M

Feb 12, 2011 – Feb 28, 2011	Your Tier Usage	1	2	3	4
Baseline Allowance	166.6000 kWh				
Tier 1 Usage (up to Baseline)	166.6000 kWh @ \$0.12233				\$ 20.38
Tier 2 Usage (101%-130% of Baseline)	49.9800 kWh @ \$0.13907				\$ 6.95
Tier 3 Usage (131%-200% of Baseline)	36.7748 kWh @ \$0.28011				\$10.30
Energy Commission Tax					\$ 0.07
Utility Users Tax (7.500%)					\$ 2.82

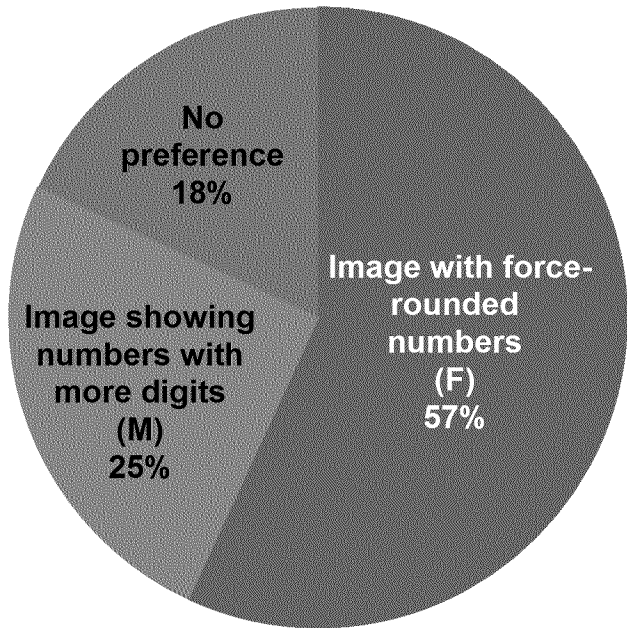
As illustrated on the following page:

- Over half selected the image with force-rounded figures over that showing numbers with more decimal places
- Nearly half indicated they still prefer the rounded figures even if they result in a different amount than that shown in the Total Charges line.

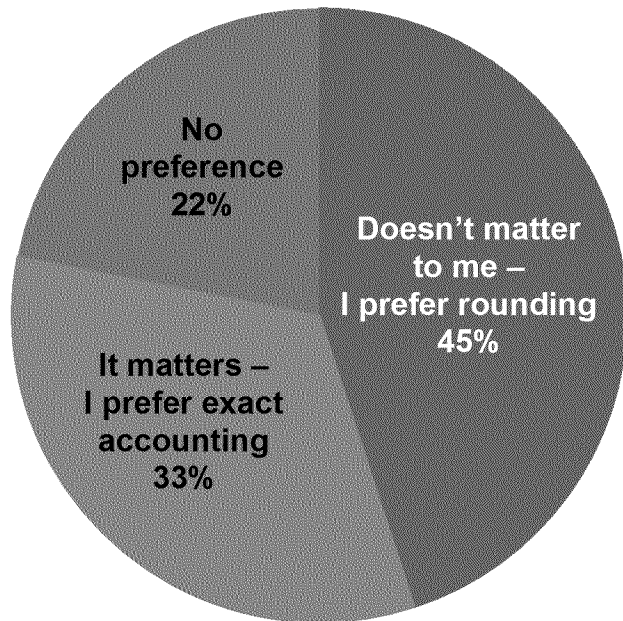
Q.15.4/15.4a
 T.98/99



Image Preference



Impact of Slightly Different Amount in Total Charges Line

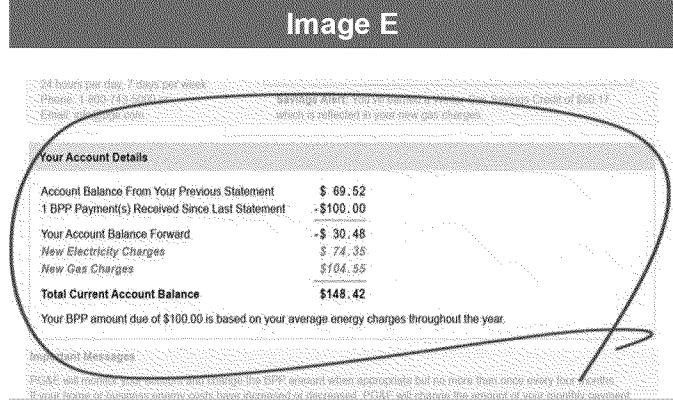
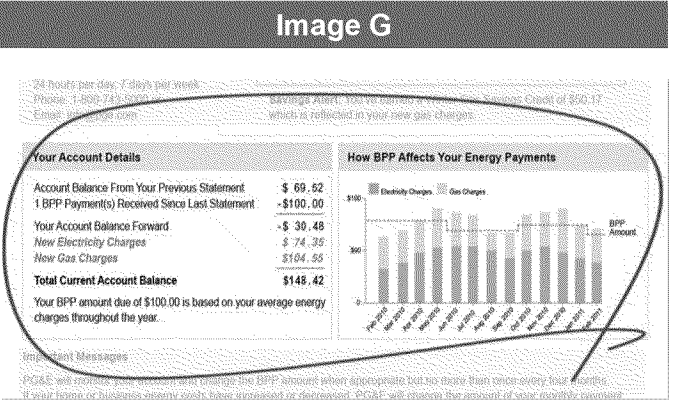


Q.15.4 "Some people prefer rounded numbers because it makes the bill less cluttered. Others prefer a more exact accounting with more decimal points even if that means a more cluttered bill. Which of these two do you prefer?"

Q.15.4a "How much does it matter to you if rounded numbers result in a slightly different amount than the amount shown in the Total Electricity (or Gas) Charges line?"

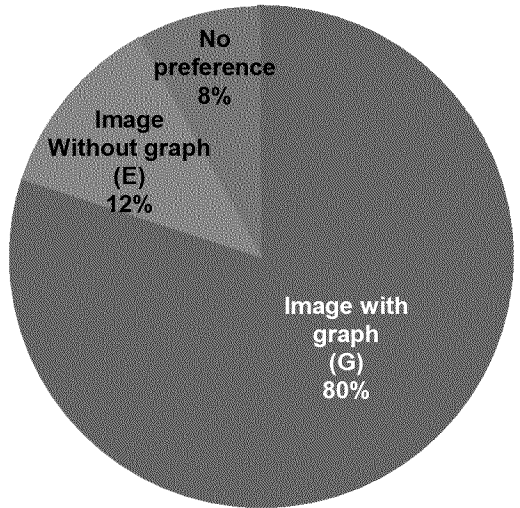
Base: Total Residential: (n=581); Banner 1A

Q.15.4/15.4a
T.98/99



- Among BPP customers, there was a clear preference for the image with the graph over that without the graph.

Image Preference



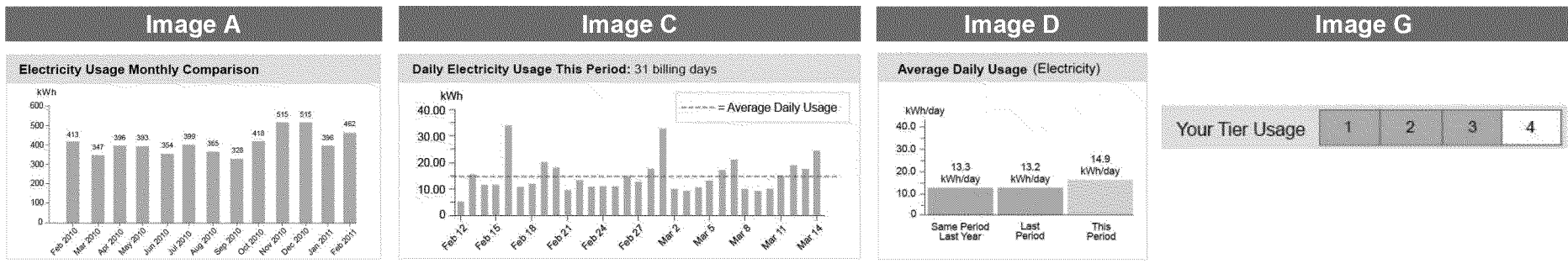
Q.15.5 "Shown below are two alternative ways of showing account details on the Balanced Payment Plan (BPP). One includes a graph that shows how BPP affects your energy payments and the other does not. Which of these two do you prefer?"

Base: Total BPP: (n=151); Banner 1D

Q.15.5
 T.100

SPECIFIC ELEMENTS OF NEW RESIDENTIAL BILL
MOST/LEAST USEFUL GRAPHIC ELEMENTS

Contains confidential information, provided pursuant to PUC § 583



- The graphs considered more useful among Residential customers are:
 - Monthly usage comparison (A)
 - Daily electricity usage (C).

- In contrast, the ones perceived less useful are:
 - Average daily usage (D)
 - Tiered usage (G).

	(A) Most Useful (n=581)	(B) Least Useful (n=581)
Daily electricity usage (C)	31% B	15%
Electricity usage monthly comparison (A)	31% B	8%
Tiered electric usage graph (G)	21%	45% A
Average daily usage (D)	18%	32% A

Q.16 "Which **one** type of information do you find **most useful** to see displayed **graphically** on your PG&E utility bill?"

Base: Total Residential: (n=581); Banner 1A

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.16
T.101x

DETAILED FINDINGS

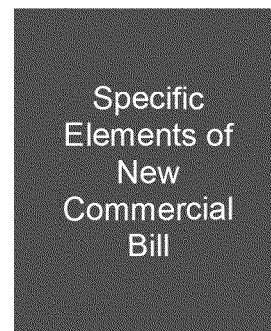
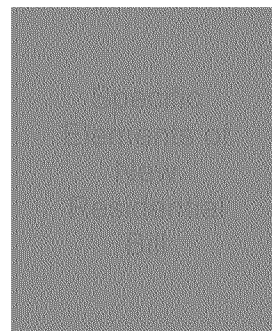
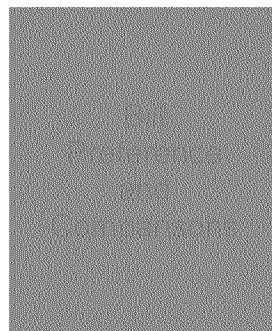
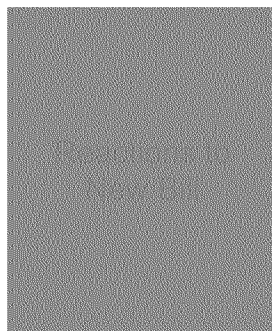
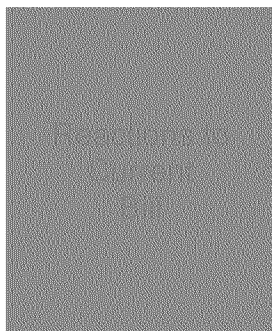
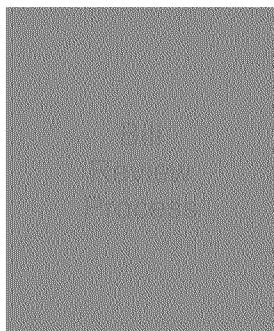


Image U

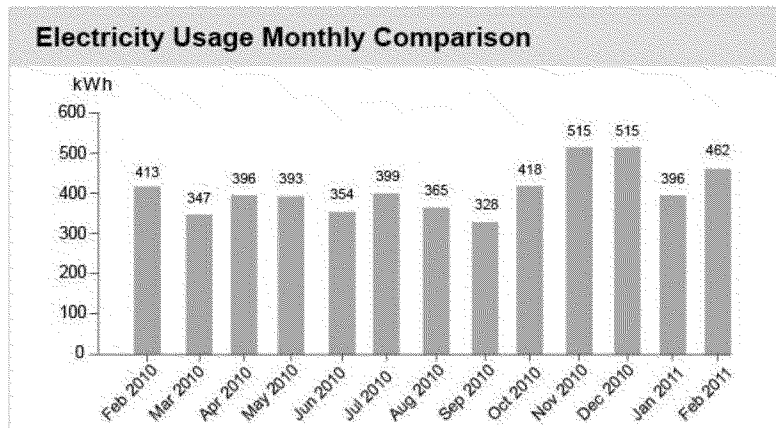
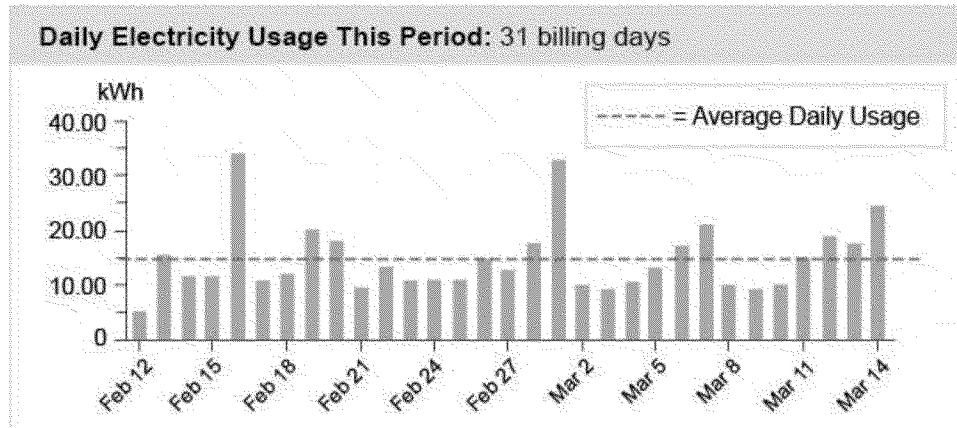


Image D



As illustrated on the following page:

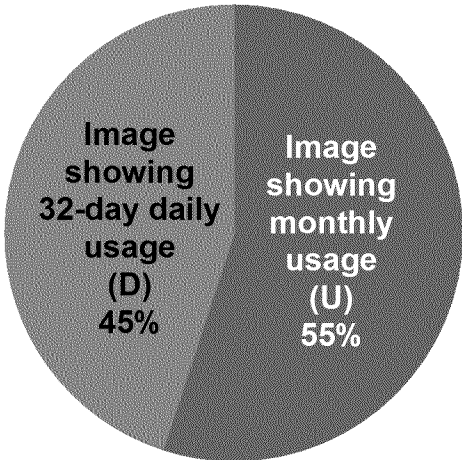
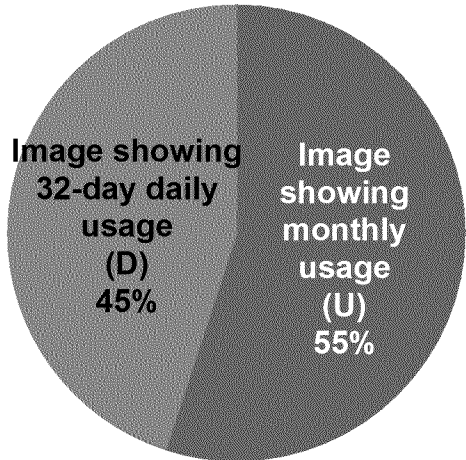
- Over half of Commercial customers...
 - preferred the monthly usage graph over that showing daily usage.
 - also preferred this graph for the front page of the bill.
- While the top reason for selecting either usage graph was the comparison of time periods, more who favored the daily graph (D) than those who preferred the monthly (U) attributed their preference to the image's user friendliness and reasons why they dislike the other graph.



Image Preference

Preference for Page 1

Reasons for Preference for Page 1

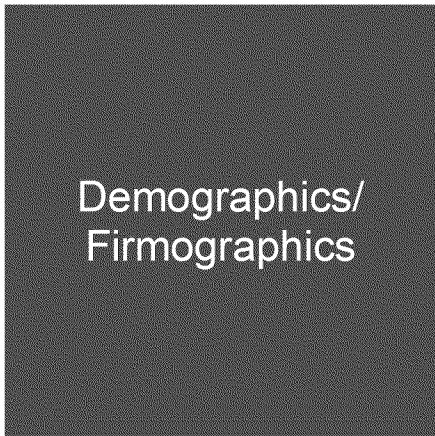


	(A) Prefer D (n=311)	(B) Prefer U (n=254)
Comparison of time periods	37%	49% A
User-friendliness	27% B	18%
Reasons criticizing other graph	19% B	6%
Like both images/ want both	8%	10%
Don't know/no answer	12%	14%

- Q.16.2 "Which of these two alternative [graphs] do you find most helpful?"
- Q.16.3 "If you were to choose one of these alternatives to be positioned on Page 1 of the bill, which would you select?"
- Q.16.4 "Why would you prefer this graph to appear on Page 1?"

Base: Total Commercial: (n=565); Banner 2A
 Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

Q.16.2-16.4
 T.103/104/105x





Among Residential respondents:

- Most, with the exception of the CARE customers, were married/living with a partner.
- The CARE group also had the highest incidence of single-person households.
- Across groups, no more than about one in three had children in the household.

Q.20 "What is your marital status?"

Q.21 "Including yourself, how many people in each of the following categories currently live in your household?"

Base: Total Residential: (n=581); Banner 1A
 CARE: (n=151); Banner 1C
 BPP: (n=151); Banner 1D
 All Others: (n=279); Banner 1B

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

	(A) Total Residential (n=581)	(B) CARE (n=151)	(C) BPP (n=151)	(D) All Others (n=279)
Marital Status				
Married/Living with partner	69%	49%	74% B	76% B
Single	20%	35% CD	15%	15%
Divorced	7%	12% D	6%	5%
Widowed	3%	1%	4%	3%
Separated	1%	3%	2%	1%
Household Size				
One	22%	33% CD	19%	18%
Two	37%	23%	42% B	43% B
Three	16%	18%	13%	15%
Four	16%	15%	18%	16%
Five	5%	5%	6%	6%
Six or more	4%	8% CD	2%	3%
Mean	2.66	2.68	2.56	2.66
Household Composition				
No children	70%	65%	71%	73%
Children	30%	35%	29%	27%
12 years and under	21%	27% D	20%	18%
13-17 years old	14%	17%	12%	12%

Q.20-23
 T.111-118



Among Residential respondents:

- A slight majority of respondents in each group were employed, but CARE customers were less likely than others to have full-time employment.
- With the exception of the CARE group, respondents were relatively upscale (mean household income hovering around \$90,000).

Q.22 "Which of the following best describes your current employment status?"

Q.23 "Which category below best describes your household's total annual income before taxes?"

Base: Total Residential: (n=581); Banner 1A
 CARE: (n=151); Banner 1C
 BPP: (n=151); Banner 1D
 All Others: (n=279); Banner 1B

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

	(A) Total Residential (n=581)	(B) CARE (n=151)	(C) BPP (n=151)	(D) All Others (n=279)
Employment Status				
Employed	57%	52%	62%	59%
Full-time	46%	33%	55% B	51% B
Part-time	11%	20% CD	7%	8%
Retired	25%	17%	25%	28% B
Not Employed	7%	16% CD	7%	4%
Homemaker	6%	6%	6%	7%
Student	4%	9% CD	--	3%
Annual Household Income				
\$50,000 or less	35%	74% CD	20%	19%
\$50,000 to \$100,000	32%	15%	36% B	39% B
Over \$100,000	15%	1%	28% BD	20% B
No response	18%	10%	17%	22% B
Mean	\$72,030	\$35,060	\$93,130 B	\$87,990 B

Q.20-23
 T.111-118



Among Commercial respondents:

- Most, with the exception of those representing large commercial/agricultural companies, were in senior management.
- More than half of the small/medium size businesses had only one PG&E account. By contrast, most of the large commercial/agricultural companies had six or more accounts.

- Q.24 "What is your position or job title?"
- Q.25 "Is your office location your company headquarters, division or branch unit headquarters, or a branch office, local office or other non-headquarters facility?"
- Q.26 "How many locations or sites do you oversee in total?"
- Q.27 "How many PG&E service accounts or service agreements does your company or organization have in total?"

* Less than .5%.

Base: Total Commercial: (n=565); Banner 2A
 Small/Medium Business: (n=304); Banner 2B
 Large Commercial/Agriculture: (n=109); Banner 2C
 Small Agriculture: (n=152); Banner 2D

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

	(A) Total Commercial (n=565)	(B) Small/ Medium (n=304)	(C) Large Comm/ AG (n=109)	(D) Small AG (n=152)
Position/Job Title				
Senior Management	65%	67% C	26%	75% C
Accounting or Financial	17%	16%	29% BD	12%
Office Management/Executive Assistant	12%	12%	13%	8%
Facilities/Engineering	4%	3%	20% BD	3%
Other	2%	2%	12% BD	2%
Office Location				
Company headquarters	82%	83% C	69%	80% C
Division or branch unit headquarters	3%	3%	13% BD	1%
Branch/local office or other non-headquarters facility	15%	14%	18%	18%
Number of Locations/Sites Oversee				
None	1%	2%	--	--
One	68%	71% CD	29%	58% C
Two to Five	18%	16%	26% B	25% B
Six to 10	4%	3%	7% B	6%
11 to 99	3%	3%	16% BD	5%
100 or more	1%	--	6% BD	--
Don't know/no answer	5%	5%	12% BD	5%
Mean	5	3	42 B	4
Number of PG&E Accounts/Agreements in Total				
One	51%	56% CD	3%	22% C
Two to Five	31%	30%	31%	48% BC
Six to 10	3%	2%	11% B	9% B
11 to 99	6%	5%	26% BD	13% B
100 or more	1%	*	9% BD	--
Don't know/no answer	8%	8%	20% BD	8%
Mean	5	4	33 BD	6 B

Q.24-31
T.119-126



Among Commercial respondents:

- The small and medium sized businesses reported an average PG&E bill of approximately \$1,200-\$2,200, while the large companies surveyed indicated an average bill of more than \$10,000.
- For the large commercial and agricultural businesses, energy-related costs represented 20% or more of their total monthly costs, on average.

- Q.28 "How many employees do you have at your current location?"
- Q.29 "What is your business' average MONTHLY PG&E bill, electricity and gas combined?"
- Q.30 "Approximately what percent of your total monthly costs are energy related?"
- Q.31 "What is your business' annual revenue?"

* Less than .5%.

Base: Total Commercial: (n=565); Banner 2A
 Small/Medium Business: (n=304); Banner 2B
 Large Commercial/Agriculture: (n=109); Banner 2C
 Small Agriculture: (n=152); Banner 2D

Letter next to data point means significantly higher than indicated group at the 95% level of confidence.

	(A) Total Commercial (n=565)	(B) Small/ Medium (n=304)	(C) Large Comm/ AG (n=109)	(D) Small AG (n=152)
Number of Employees at Current Location				
Fewer than five	55%	56% C	4%	66% BC
Five to 49	35%	37% D	36% D	15%
50 to 99	2%	1%	17% BD	3% B
100 to 199	2%	1%	14% BD	2%
200 to 399	1%	1%	6% BD	1%
400 or more	1%	--	15% BD	1% B
No answer	6%	5%	9%	13% B
Mean	17	11	148.05 BD	17
Average Monthly PG&E Bill				
Less than \$500	54%	59% CD	--	38% C
\$500 to \$1,499	23%	24% C	2%	30% C
\$1,500 to \$1,999	3%	3%	3%	4%
\$2,000 or more	13%	10%	83% BD	18% B
Not sure	6%	5%	13% B	11% B
Mean	\$1,654	\$1,204	\$10,965 BD	\$2,227 B
Percent of Total Monthly Costs Energy Related				
Less than 5%	33%	36% CD	11%	19%
5% to 9%	19%	19% C	8%	20% C
10% or more	31%	30%	46% B	39% B
Not sure	17%	16%	35% BD	22%
Mean	13%	12%	27% BD	20% B
Annual Business Revenue				
Less than \$100,000	19%	19% C	--	32% BC
\$100,000 to less than \$1 million	36%	39% CD	5%	18% C
\$1 million to less than \$10 million	13%	13%	23% BD	11%
\$10 million or more	2%	1%	18% BD	4% B
Not applicable (e.g., government agency)	3%	2%	15% BD	1%
No answer	27%	26%	39% B	34%
Mean (in millions)	\$7.50	\$1.70	\$217.5 BD	\$4.00 B

Q.24-31
T.119-126



Appendix

EXPLANATION OF ALGORITHM FOR HIGHLIGHTING EXERCISE

Contains confidential information, provided pursuant to PUC § 583



The following algorithm was used to show results for the highlighting exercises on Pages 30 – 36.

If **LIKE** ≥ 35% of respondents and difference between **LIKE** and **DISLIKE** is...

70% +	then	████████
50% to 69%	then	————
35% to 49%	then	-----

If **DISLIKE** ≥ 5% of respondents and difference between **LIKE** and **DISLIKE** is...

0% to 10%	then	████████
------------------	-------------	-----------------

If **DISLIKE** ≥ 5% of respondents and difference between **LIKE** and **DISLIKE** is...

-0.1% to -4.9%	then	-----
-5% to -10%	then	————
-11% or more	then	████████



travisresearch

Project No. 11-140-15
(12/16/11)

Double-click on
image to view
Residential
Online Survey



**PG&E Bill Redesign Research - Residential
E-MAIL INVITATION**

<u>PG&E Programs (Sample – Quotas Based on Sample)</u>	<u>Version</u>
-1 Non-CARE/BPP Customers (n = 300)	-1 Non-CARE (including BPP)
-2 CARE Customers (n = 150)	-2 CARE
-3 BPP Customers (n = 150)	

<u>Area (Sample – Quotas Based on Sample)</u>
Areas 1-3 (n = 45% or 270)
Areas 4-5 (n = 25% or 150)
Areas 6-7 (n = 30% or 180)

TO: (Name of Respondent)

FROM: Travis Research on Behalf of Pacific Gas & Electric

SUBJECT: Bill Design Study

Dear PG&E Customer:

Pacific Gas & Electric provides electricity and natural gas to households and businesses throughout Northern California. The company is in the process of redesigning its monthly bills and is looking for feedback from its customers.

Please be assured that your individual responses will be kept completely confidential and your feedback will help PG&E® better design its customer bills. To help ensure confidentiality and allowing for your candid feedback, the research is being conducted by Travis Research, an independent research firm.

Please take part in this important survey by clicking on the link below or pasting it into your browser window.

<http://travis-surveys.com/>(need unique ID sequence for each segment)

The survey should take no more than 15-20 minutes and your participation is greatly appreciated. To thank you for completing the survey, you will be entered into a drawing for one of 50 \$50 Amazon.com gift cards. You must answer each question in order to qualify for the survey and for the drawing.

This survey will only be available for a limited time, so please attempt to complete it within three days of receiving this message.

Thank you for your cooperation!

Should you have any questions regarding sponsorship of this survey, please contact PG&E:
Kevin Sharp
415.973.5651
K250@pge.com

(OPT-OUT TEXT + HELP DESK CONTACT HERE)





travisresearch

Project No. 11-140-11
(01/03/12)

Double-click on image to view Non-Residential Online Survey



**PG&E Bill Redesign Research – Non-Residential
E-MAIL INVITATION**

Business Segment (From Sample) (n = 600)
 ...Commercial Segments...
 -4 Small Businesses (n = 240)
 -5 Medium Businesses (n = 60)
 -6 Large Commercial and Industrial Businesses (n = 100)
 ...Agriculture Segments...
 -7 Large Agricultural Customers (n = 50)
 -8 Small Agricultural Customers (n = 50)

Area for Commercial Segments ONLY (From Sample) (n = 400)
 Areas 1-3 (n=50% or 195-205)
 Areas 4-5 (n=25% or 95-105)
 Areas 6-7 (n=25% or 95-105)

NAICS Distribution for Small-Medium Businesses (From Sample or Q.E.05) (n=300)
 -1 Construction/Minng/Manufacturing/Wholesale & Transportation [23/21/31/32/33/42/48/49] (n=6% or 44-52)
 -2 Financial/Professional/Technical/Admin [52/53/55/51/54/56/92] (n=20% or 59-64)
 -3 Education/Healthcare/Hospitality/Food Service/Entertainment [61/62/71/72] (n=22% or 62-70)
 -4 Retail and Other Services [44/49/81] (n=37% or 107-115)
 -5 Unclassified [All other codes except 00/11/22] (n=5% or 1-19) → All others to be recoded into quota group [-1], [-2], [-3], or [-4] based on response to Q.E.05

TO: (Name of Respondent)

FROM: Travis Research on Behalf of Pacific Gas & Electric

SUBJECT: Bill Design Study

Dear PG&E Customer:

Pacific Gas & Electric provides electricity and natural gas to households and businesses throughout Northern California. The company is in the process of redesigning its monthly bills and is looking for feedback from its customers.

Please be assured that your individual responses will be kept completely confidential and your feedback will help PG&E[®] better design its customer bills. To help ensure confidentiality and allowing for your candid feedback, the research is being conducted by Travis Research, an independent research firm.

Please take part in this important survey by clicking on the link below or pasting it into your browser window.

[http://travis-surveys.com/\(need unique ID sequence for each segment\)](http://travis-surveys.com/(need unique ID sequence for each segment))

The survey should take no more than 20-25 minutes and your participation is greatly appreciated. To thank you for completing the survey, you will receive a check in the amount of \$10 (or you can donate the \$10 to one of six pre-selected charities). You must answer each question in order to qualify.

This survey will only be available for a limited time, so please attempt to complete it within three days of receiving this message.

Thank you for your cooperation!

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 Kevin Sharp
 415.973.5651
K2So@pge.com

(OPT-OUT TEXT + HELP DESK CONTACT HERE)

