

Chart 1 / MD PSC / 2002 Survey of Residential and Commercial Customers

■ Research Design:

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

■ Purpose

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

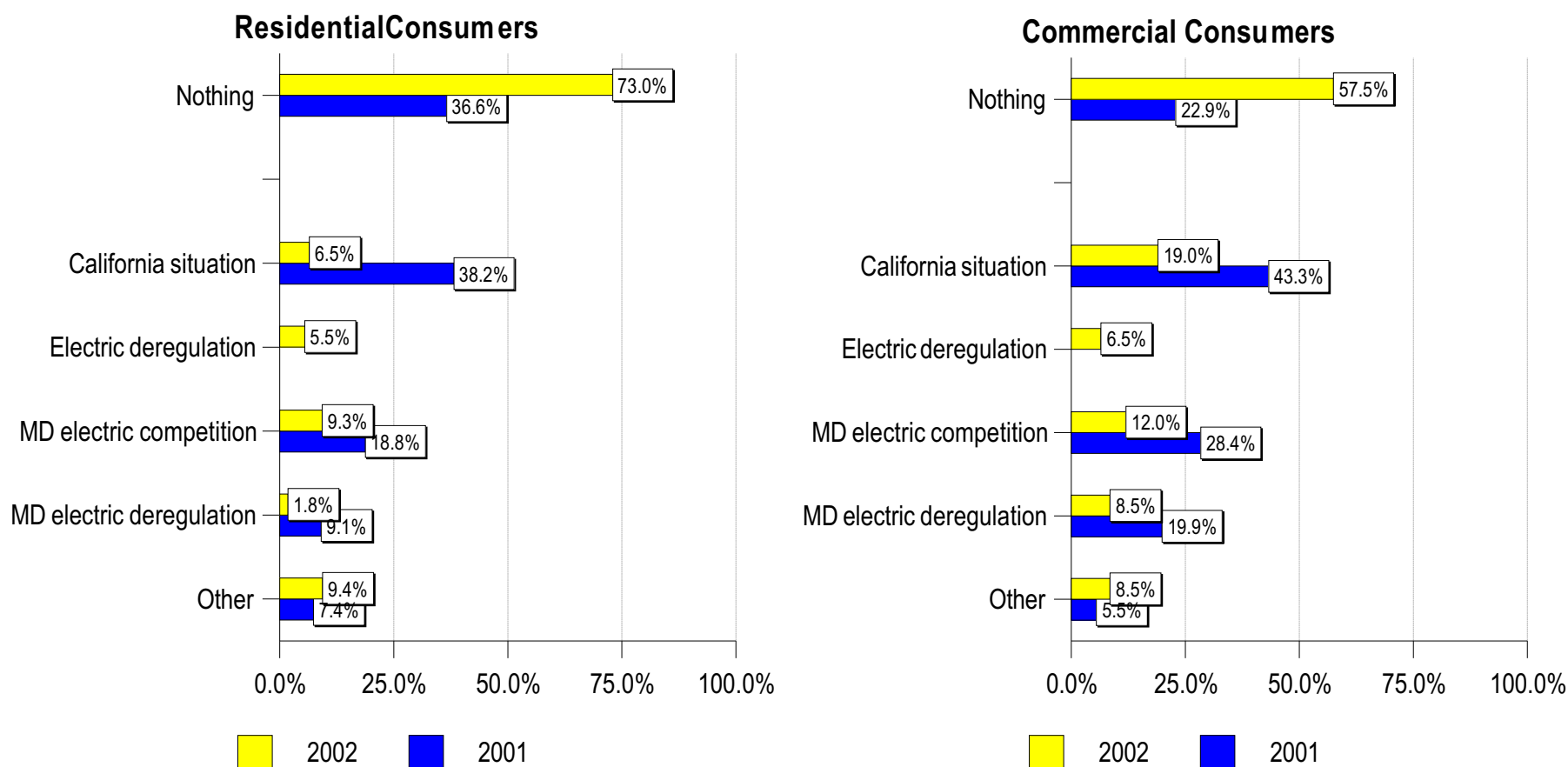
■ Survey Administration

- CATI telephone interviews conducted September 9-20, 2002
- All interviews conducted by paid, trained and professionally supervised interviewers

Chart 2 / MD PSC / 2002 Survey of Residential and Commercial Customers

What do you recall hearing or seeing in the news about the supply of electricity in the past 6 months?

[Among all respondents | TOTAL MENTIONED]

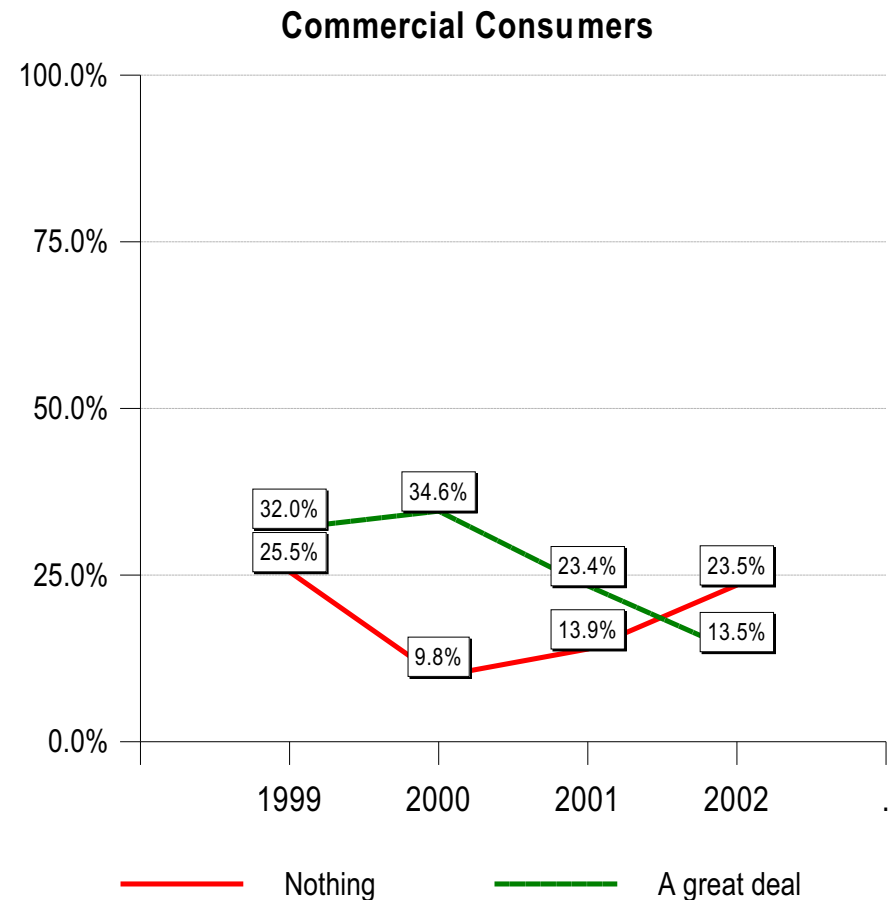
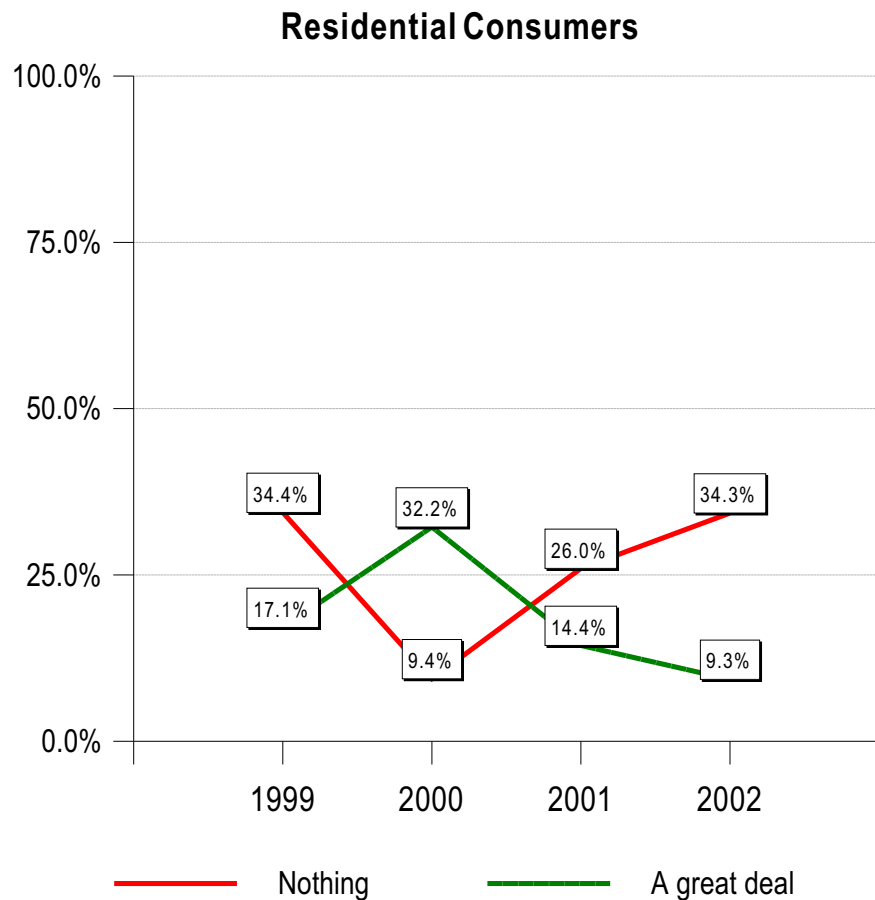


Source: RKM Research and Communications, Inc.

Chart 3 / MD PSC / 2002 Survey of Residential and Commercial Customers

How much have you heard about electric competition in Maryland?

[Among all respondents: compared over time]

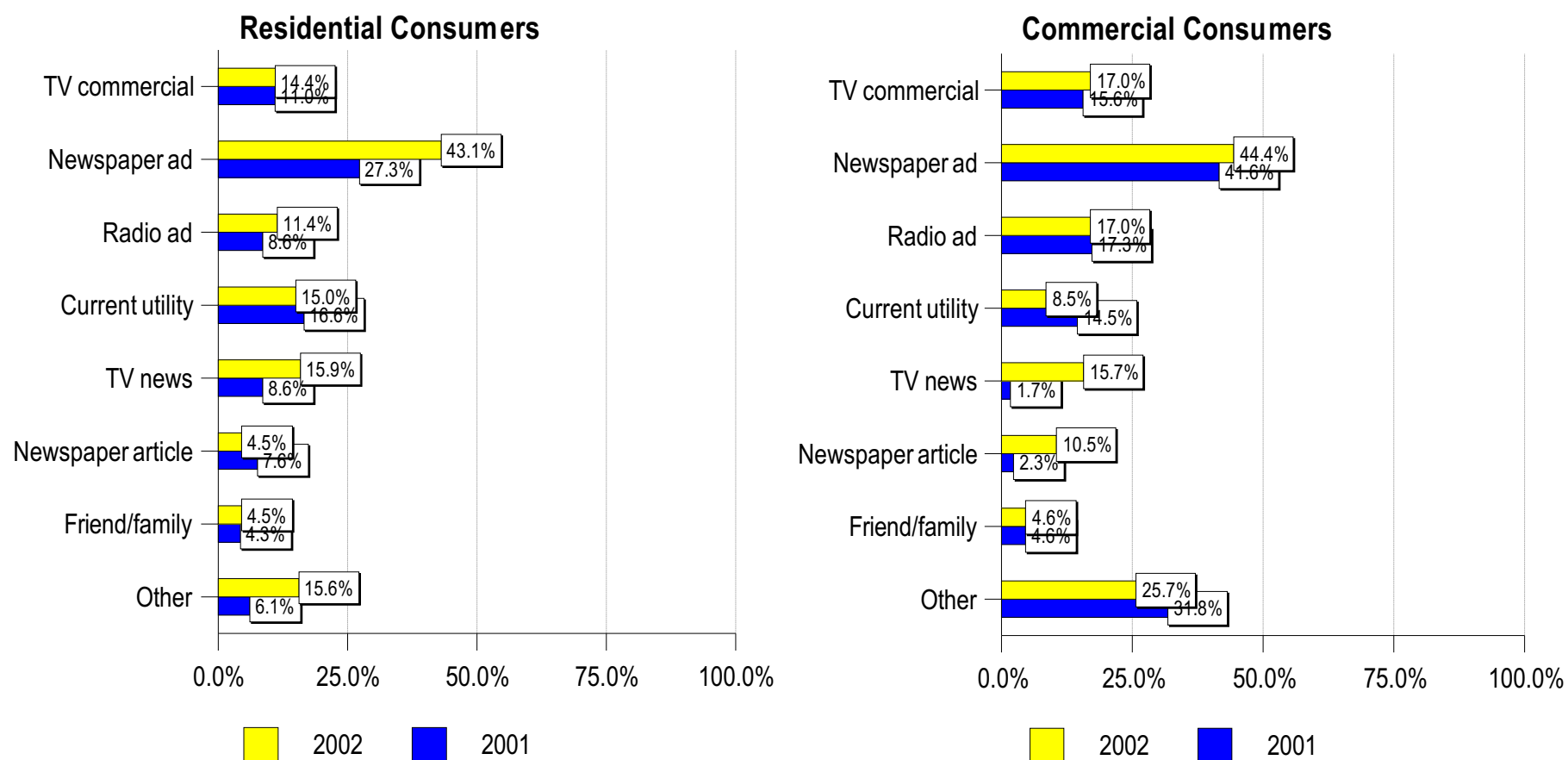


Source: RKM Research and Communications, Inc.

Chart 4 / MD PSC / 2002 Survey of Residential and Commercial Customers

Where did you hear about electric competition in Maryland?

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

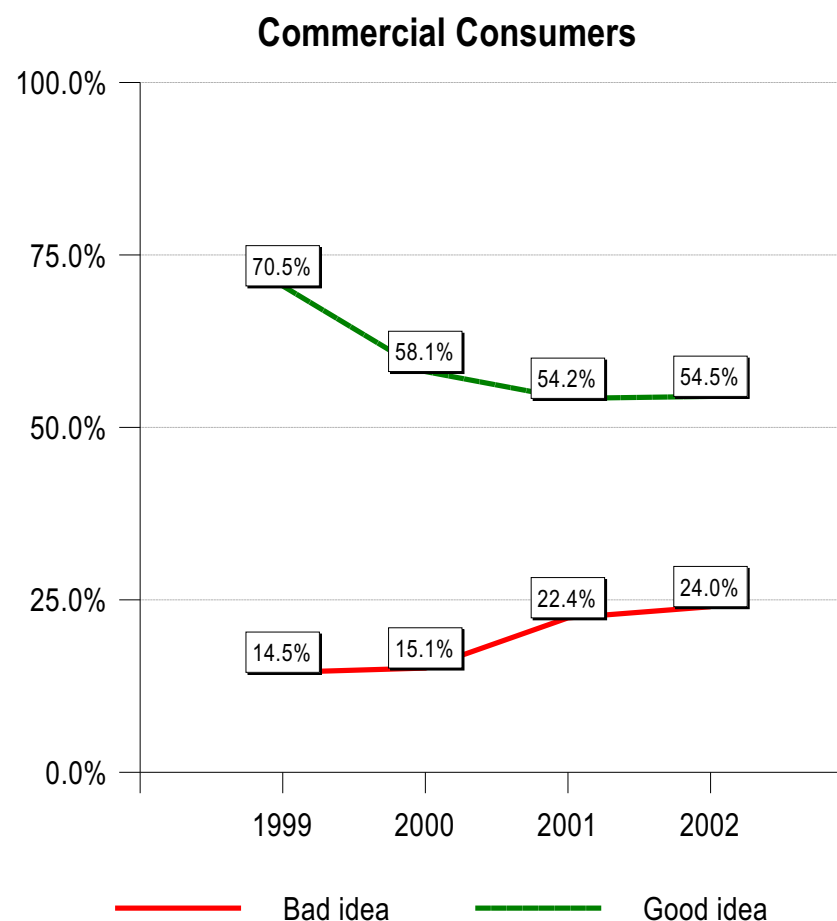
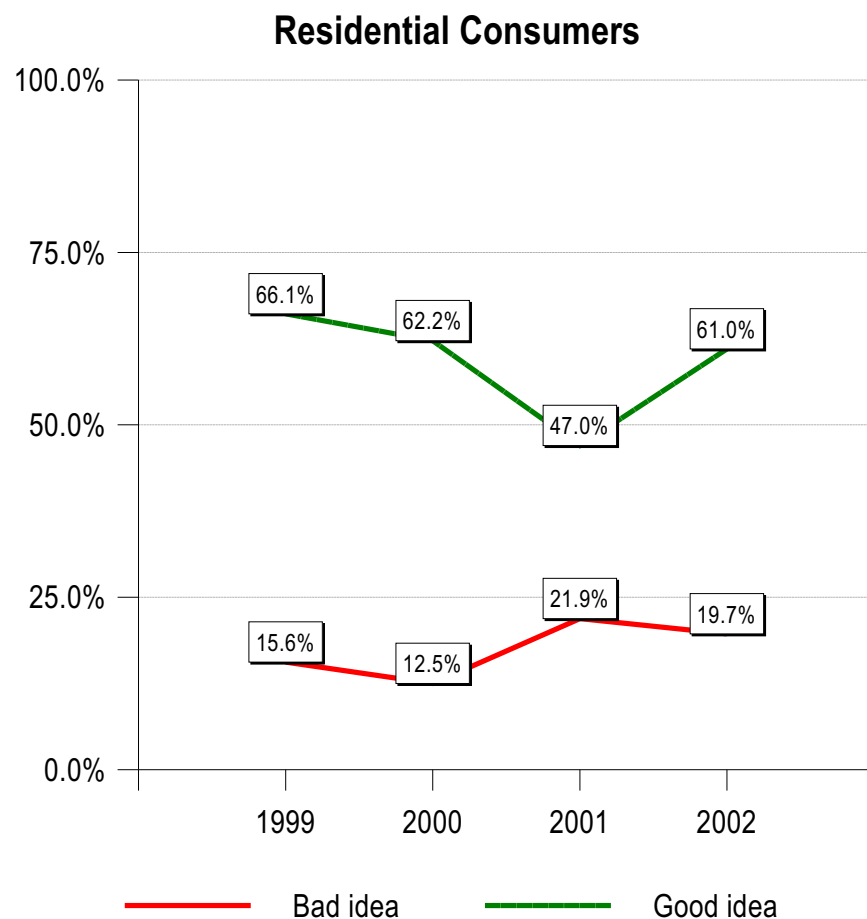


Source: RKM Research and Communications, Inc.

Chart 5 / MD PSC / 2002 Survey of Residential and Commercial Customers

View toward electric competition in Maryland?

[Among all respondents: compared over time]

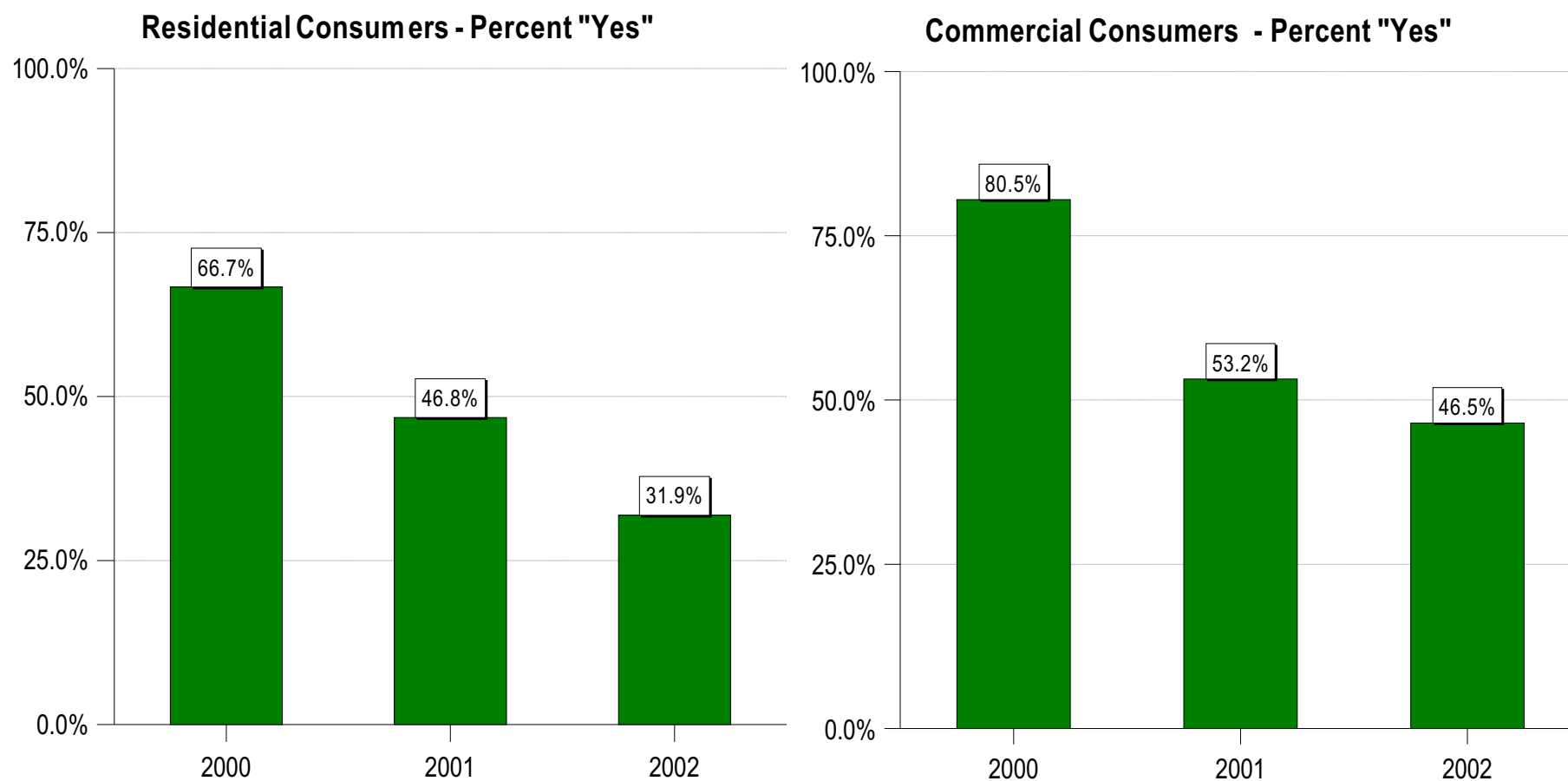


Source: RKM Research and Communications, Inc.

Chart 6 / MD PSC / 2002 Survey of Residential and Commercial Customers

Have you seen any type of advertising about electric competition in Maryland?

[Among all respondents: compared over time]

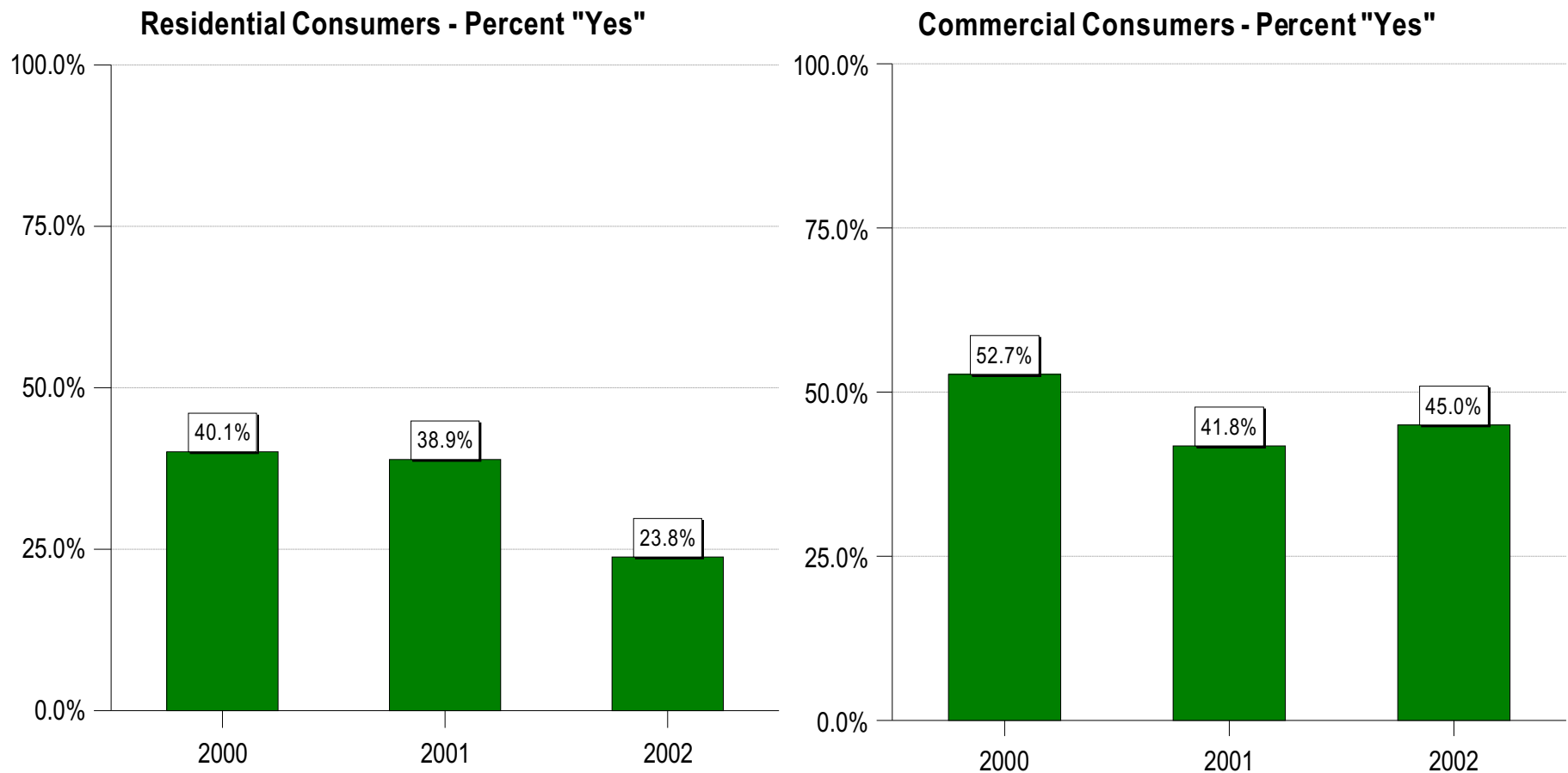


Source: RKM Research and Communications, Inc.

Chart 7 / MD PSC / 2002 Survey of Residential and Commercial Customers

Have you heard any news stories about electric competition?

[Among all respondents: compared over time]

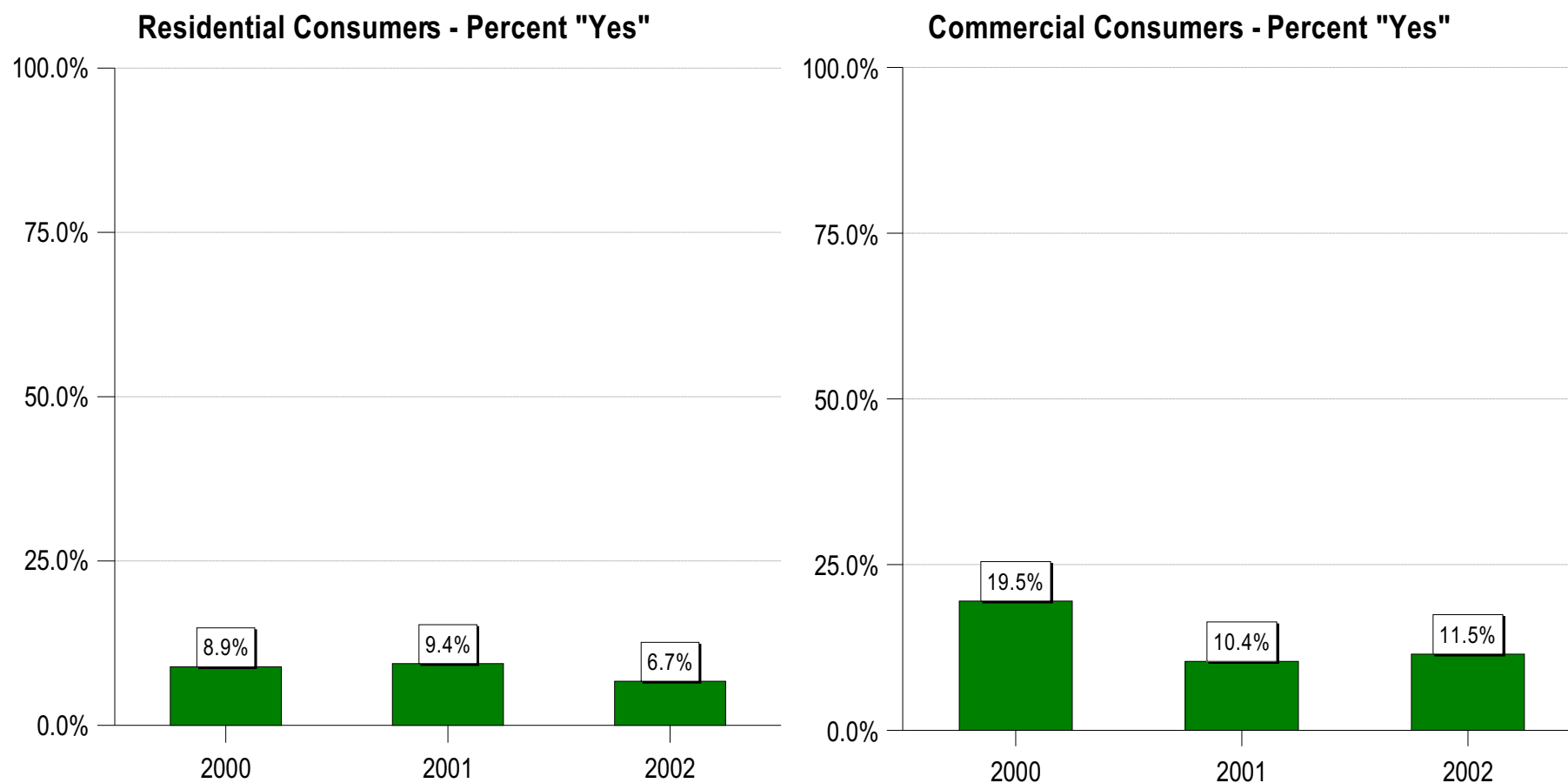


Source: RKM Research and Communications, Inc.

Chart 8 / MD PSC / 2002 Survey of Residential and Commercial Customers

Have you or family member received a consumer guide from MD PSC?

[Among all respondents: compared over time]

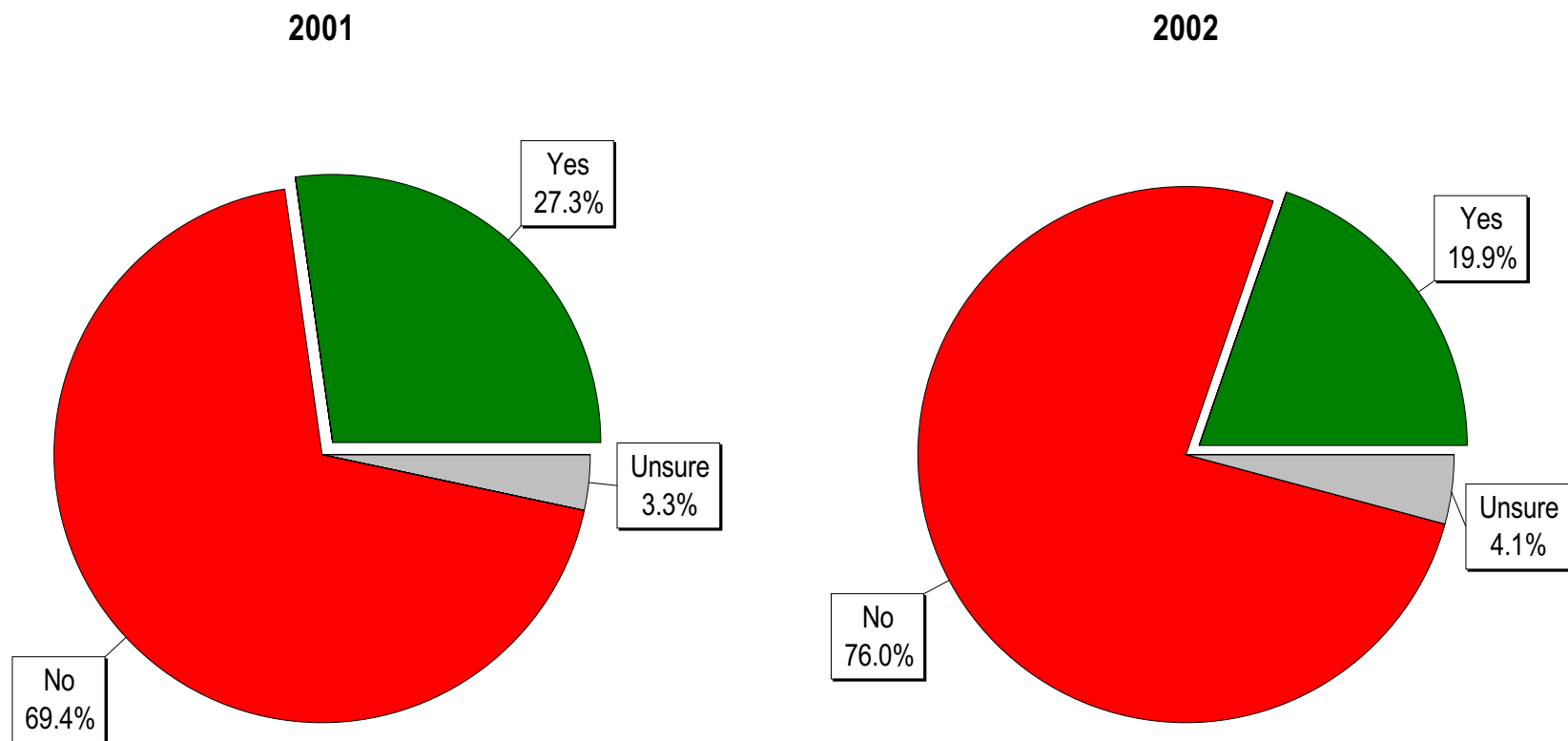


Source: RKM Research and Communications, Inc.

Chart 9 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition website?

[Among Residential Consumers: compared over time]

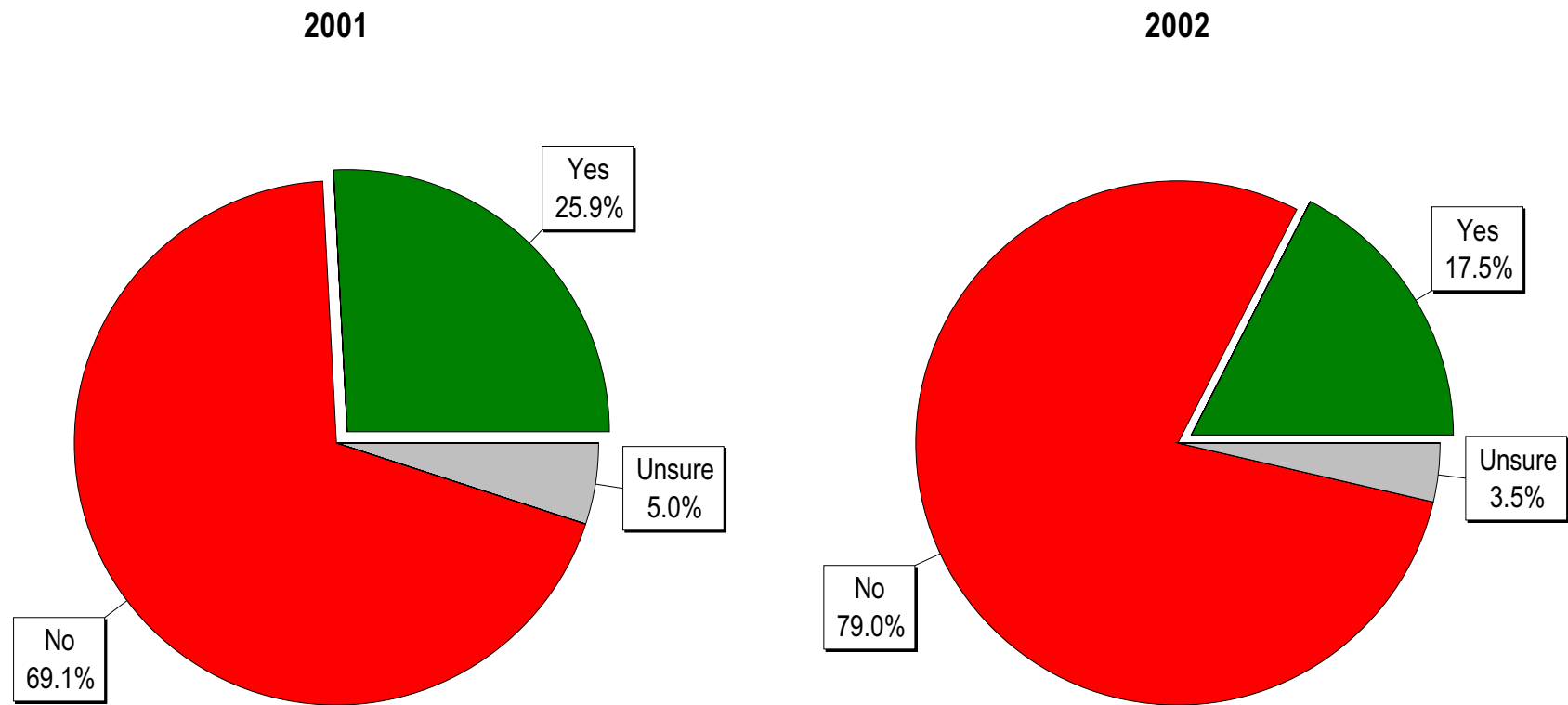


Source: RKM Research and Communications, Inc.

Chart 10 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition website ?

[Among Commercial Consumers: compared over time]

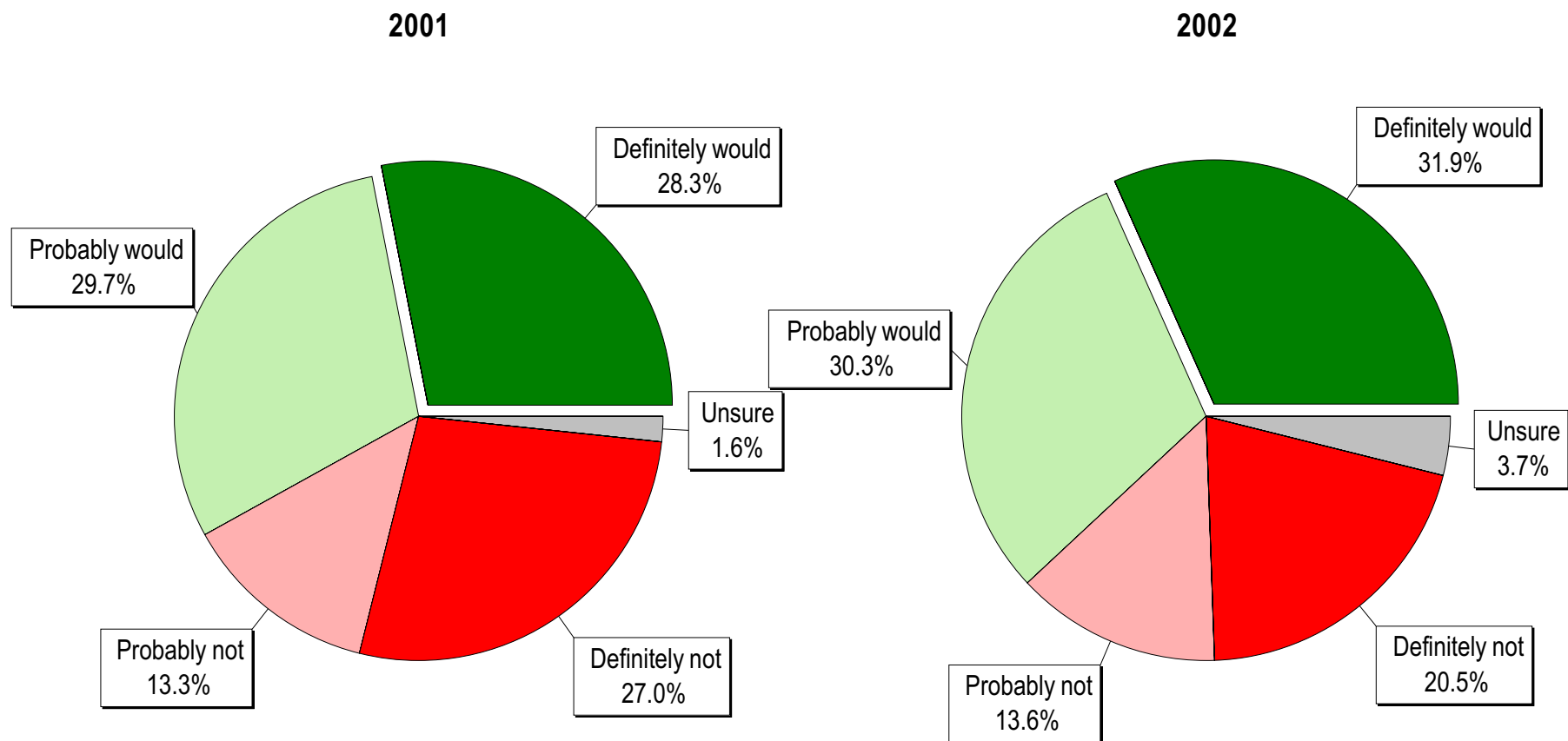


Source: RKM Research and Communications, Inc.

Chart 11 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among Residential Consumers: compared over time]

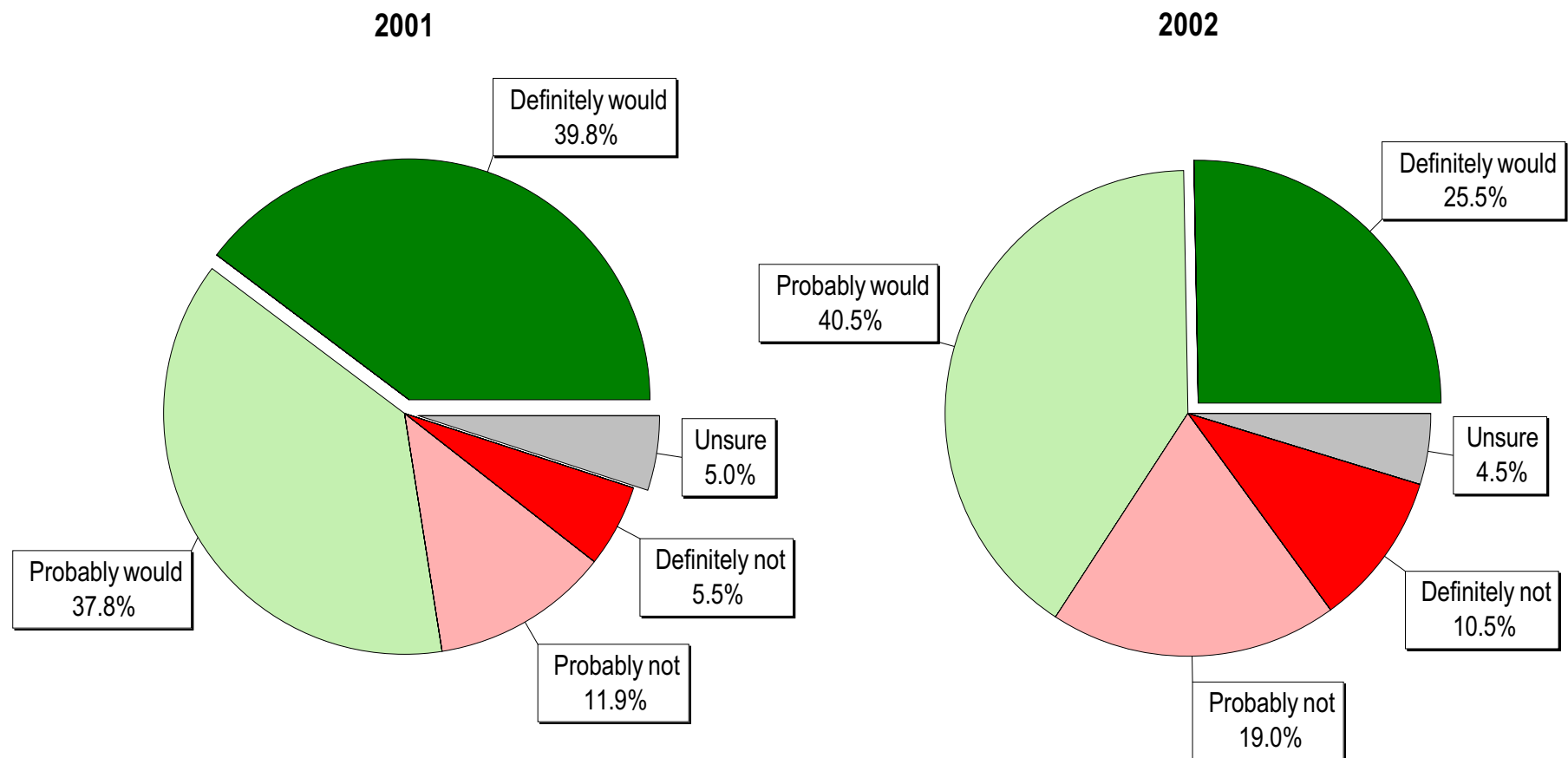


Source: RKM Research and Communications, Inc.

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

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

[Among Commercial Consumers: compared over time]

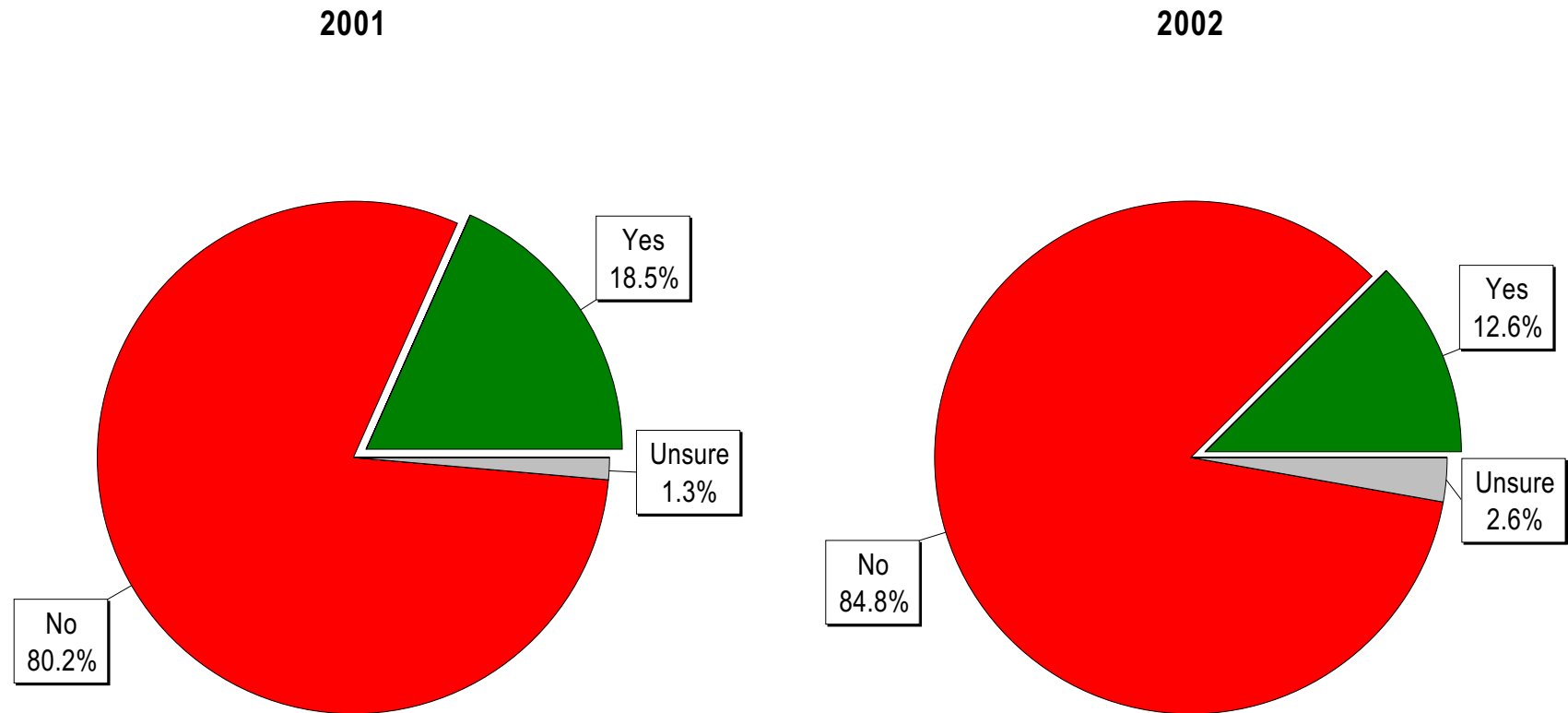


Source: RKM Research and Communications, Inc.

Chart 13 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition answer center?

[Among Residential Consumers: compared over time]

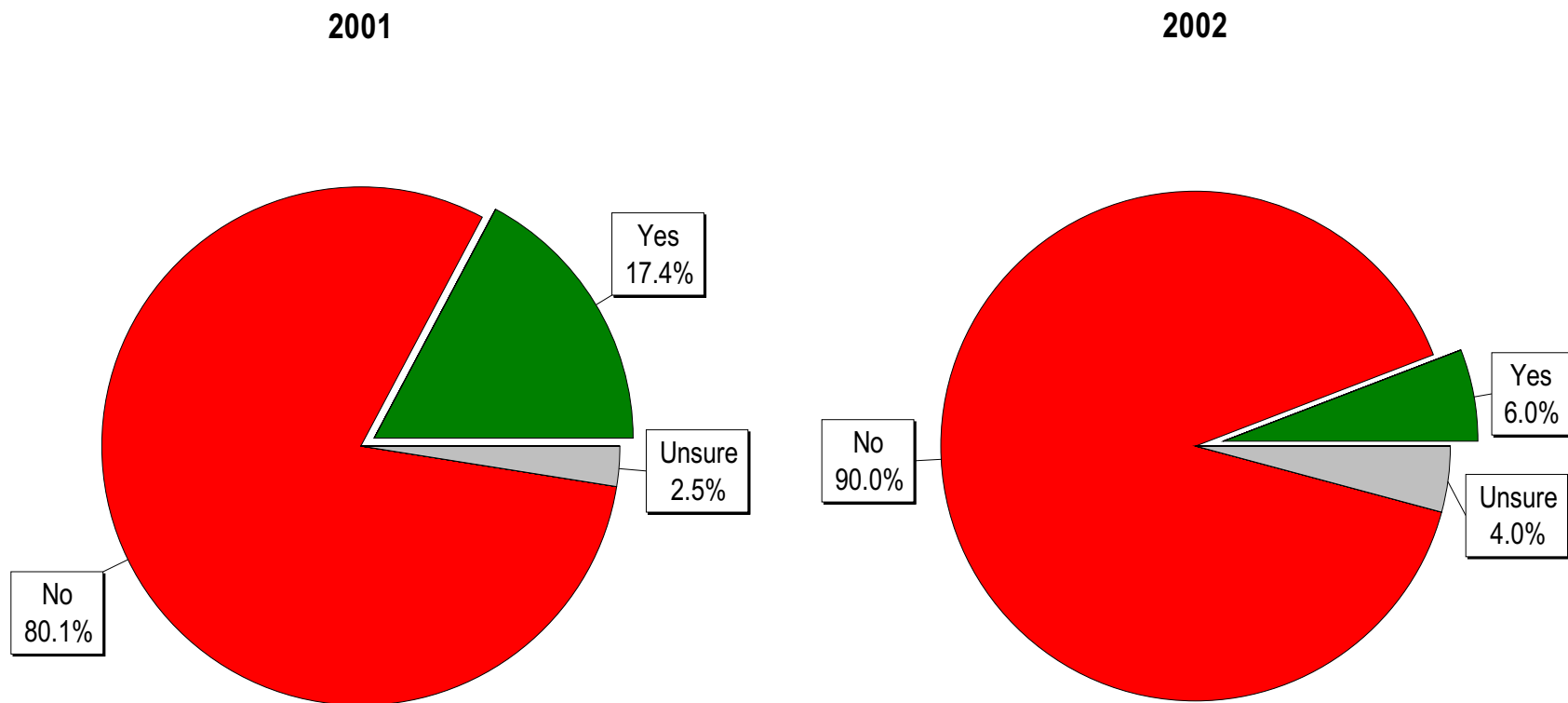


Source: RKM Research and Communications, Inc.

Chart 14 / MD PSC / 2002 Survey of Residential and Commercial Customers

Awareness of electric competition answer center?

[Among Commercial Consumers: compared over time]

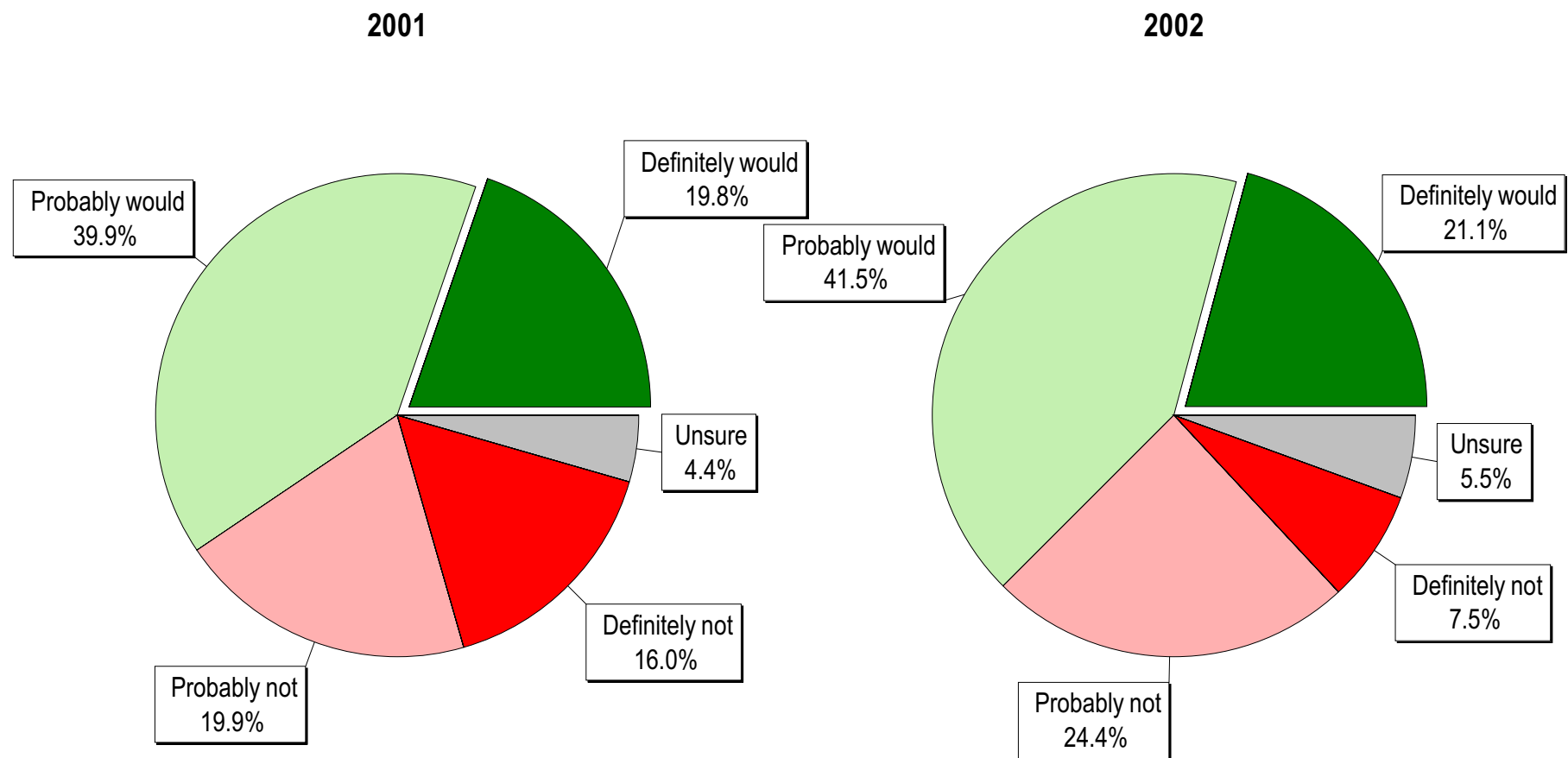


Source: RKM Research and Communications, Inc.

Chart 15 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among Residential Consumers: compared over time]

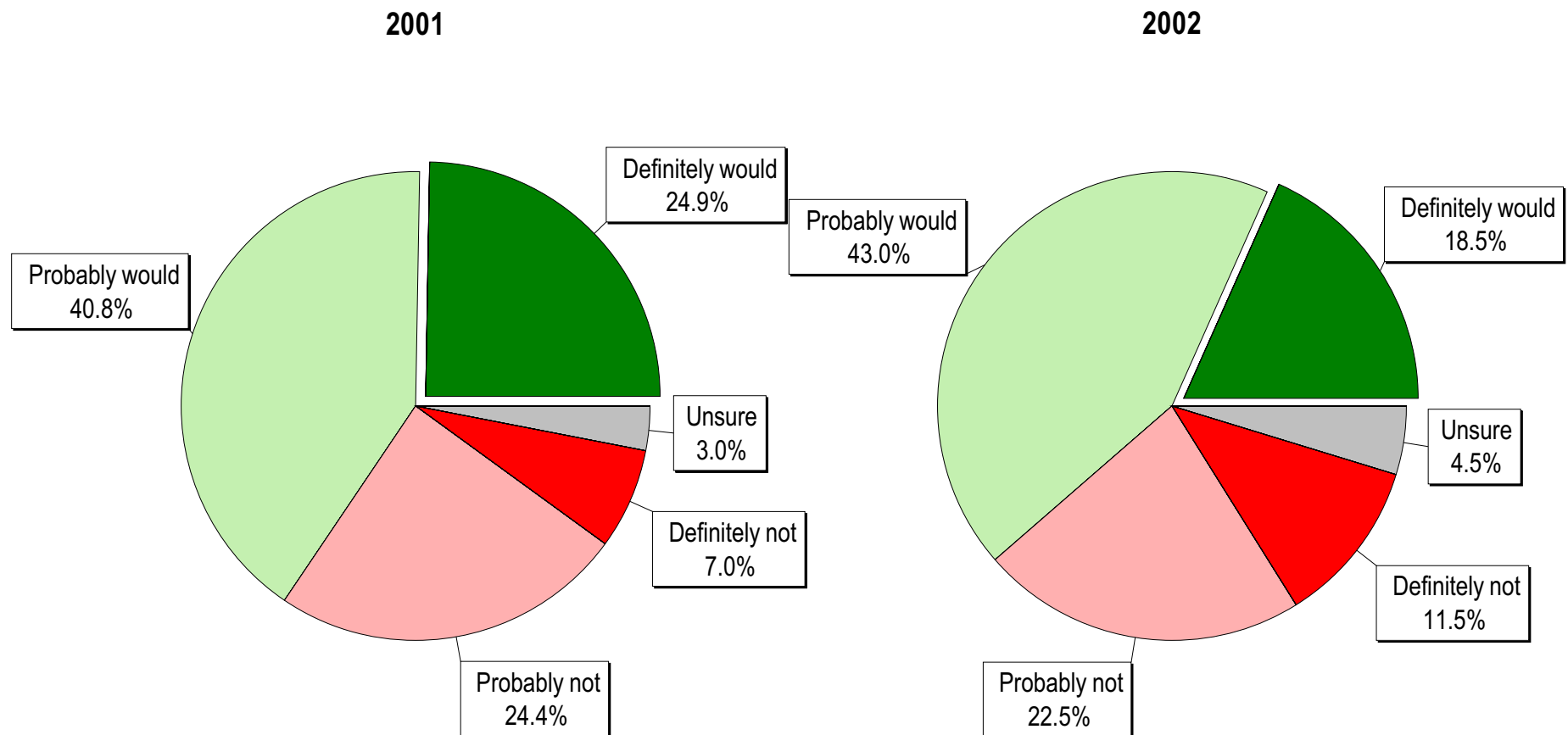


Source: RKM Research and Communications, Inc.

Chart 16 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among Commercial Consumers: compared over time]

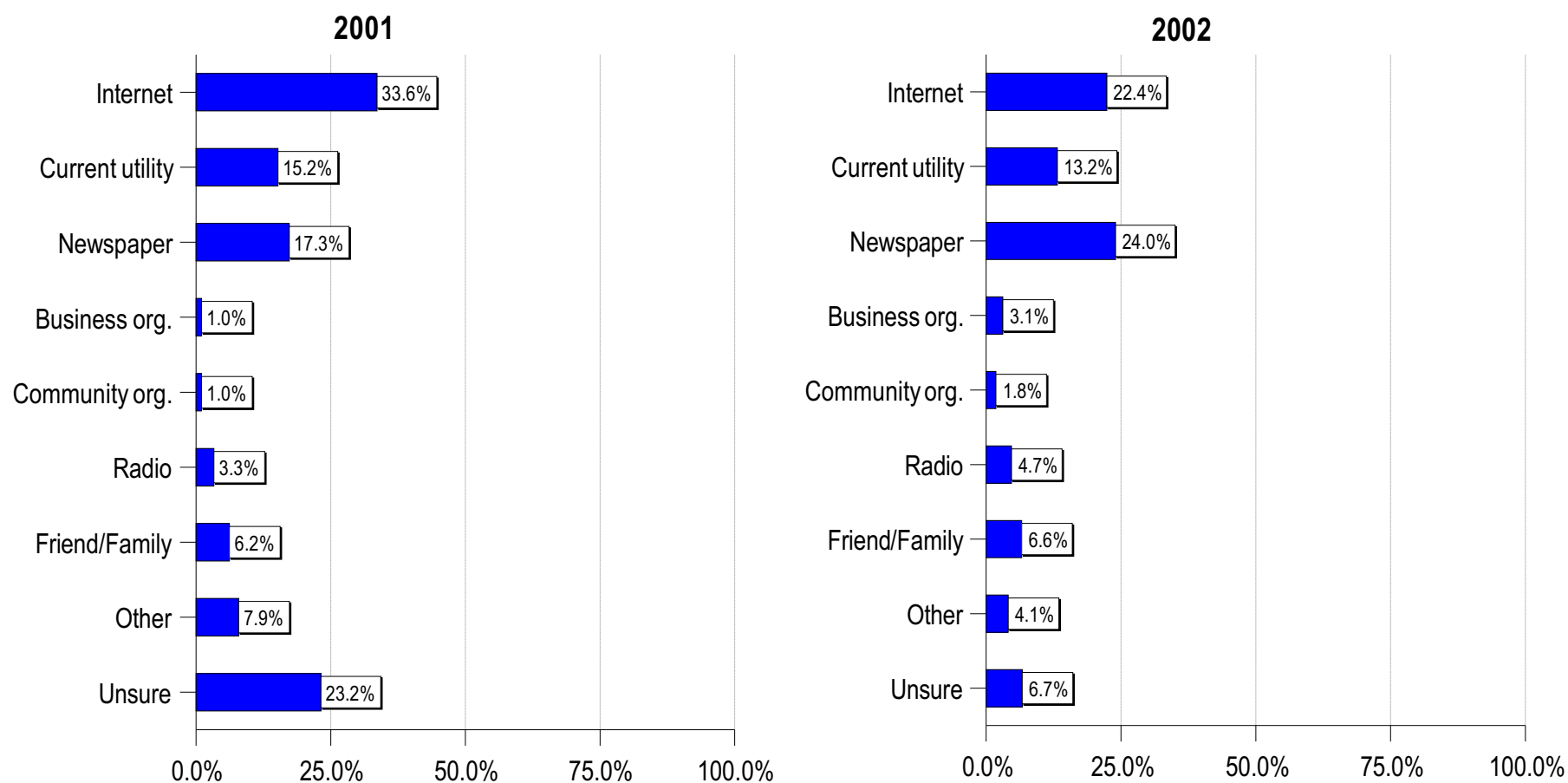


Source: RKM Research and Communications, Inc.

Chart 17 / MD PSC / 2002 Survey of Residential and Commercial Customers

If you wanted more information about electric competition, where would you look?

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

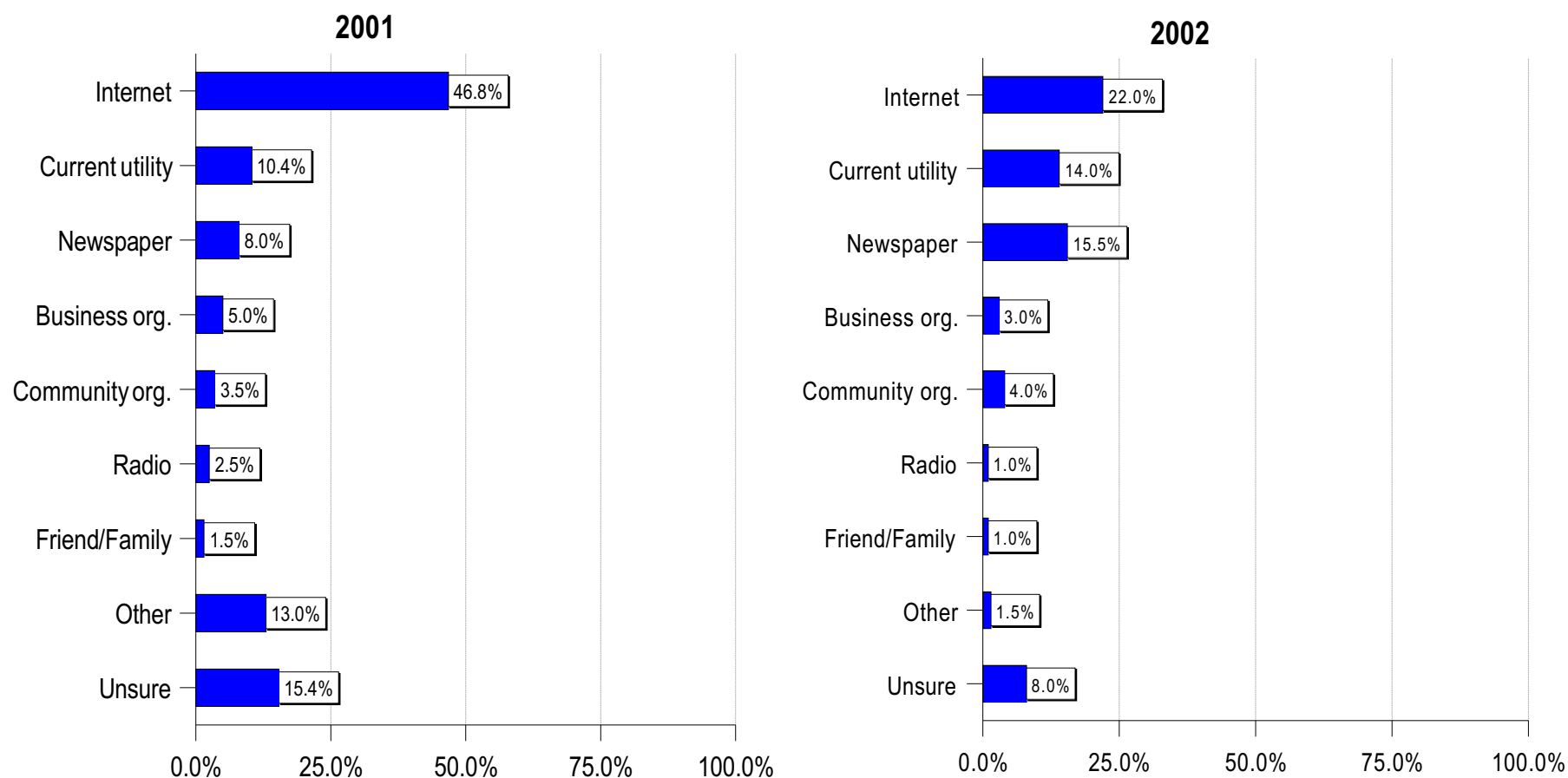


Source: RKM Research and Communications, Inc.

Chart 18 / MD PSC / 2002 Survey of Residential and Commercial Customers

If you wanted more information about electric competition, where would you look?

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

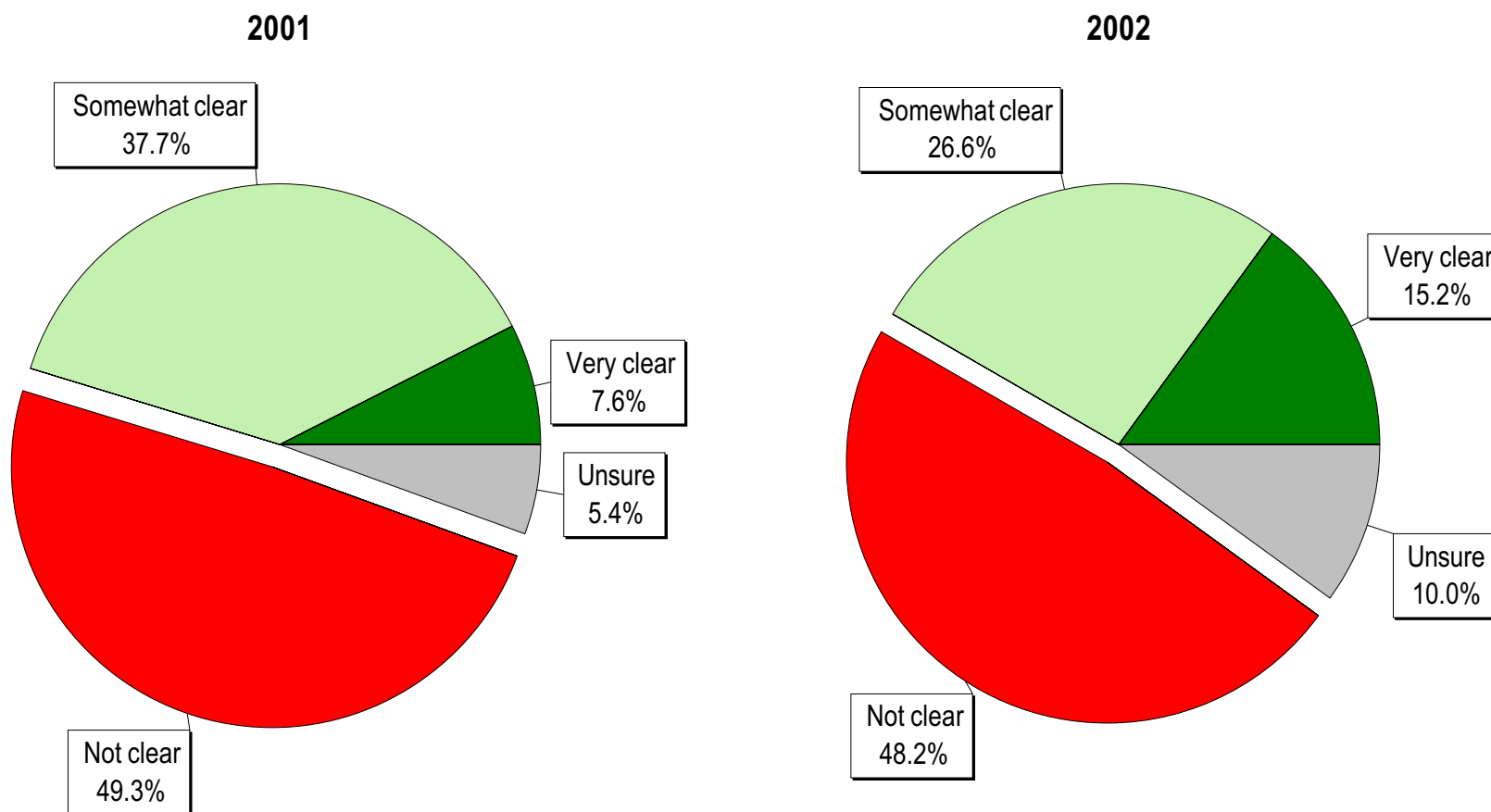


Source: RKM Research and Communications, Inc.

Chart 19 / MD PSC / 2002 Survey of Residential and Commercial Customers

How well do you understand the current status of electric competition in Maryland?

[Among Residential Consumers: compared over time]

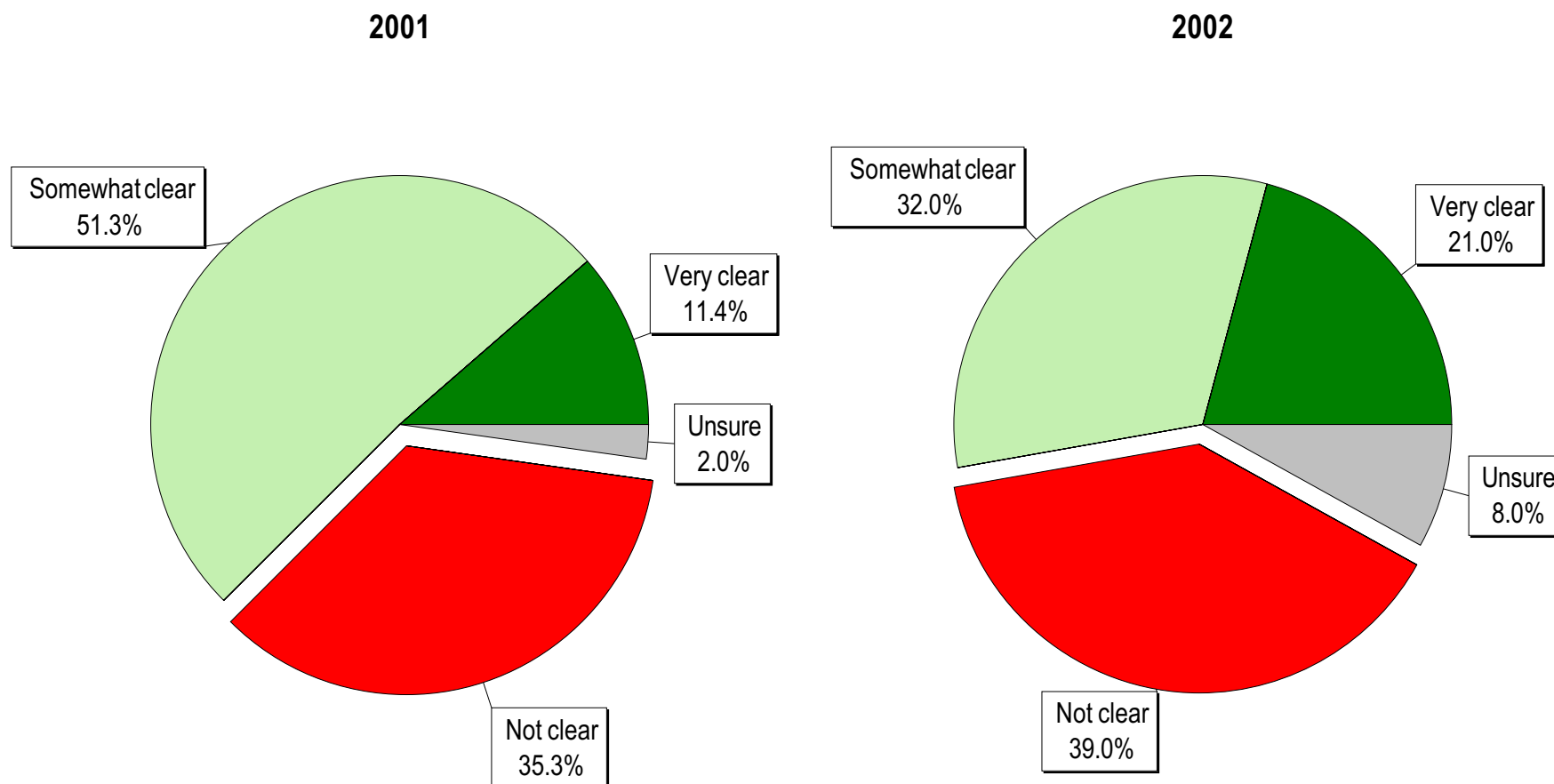


Source: RKM Research and Communications, Inc.

Chart 20 / MD PSC / 2002 Survey of Residential and Commercial Customers

How well do you understand the current status of electric competition in Maryland?

[Among Commercial Consumers: compared over time]

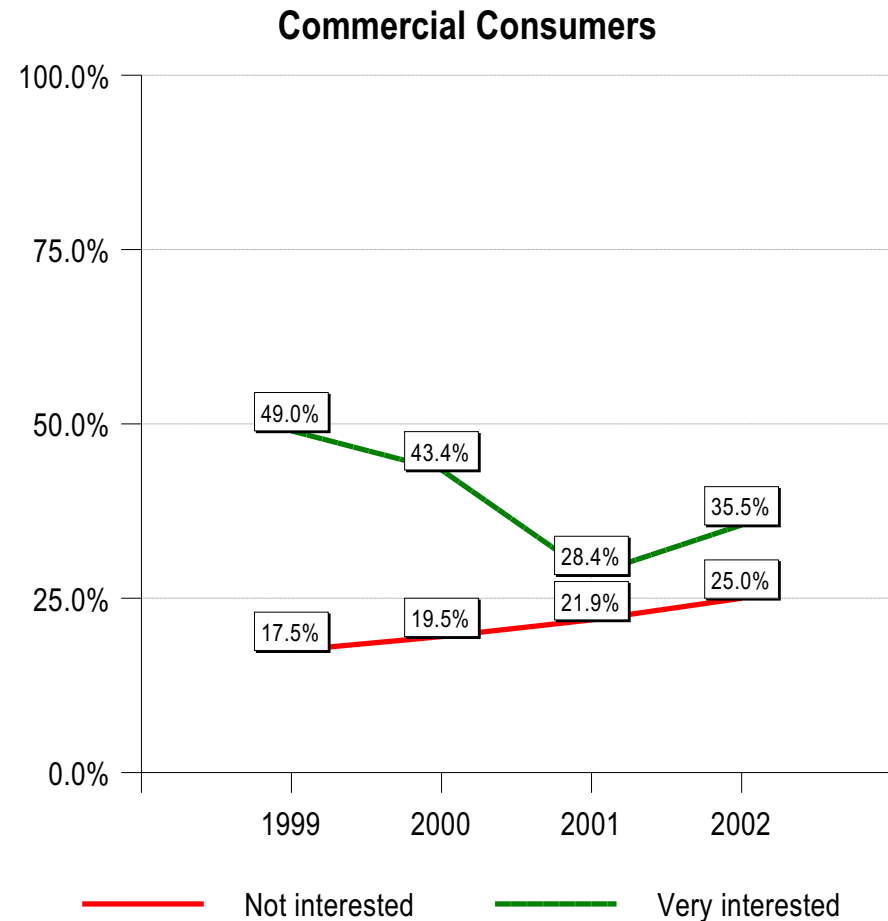
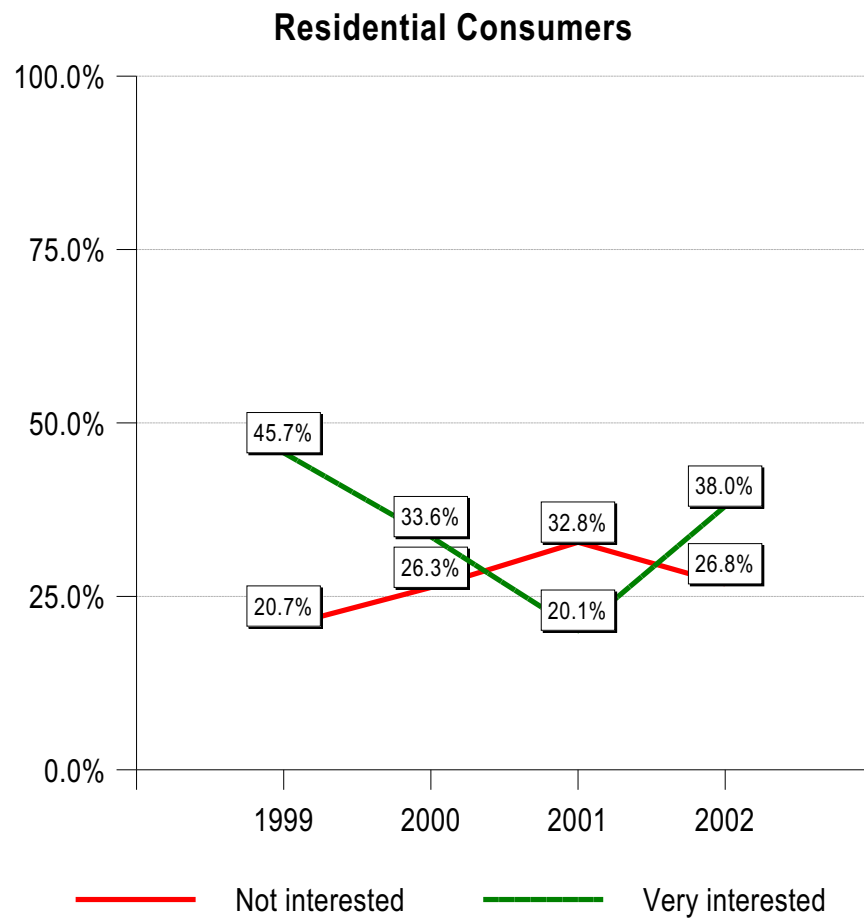


Source: RKM Research and Communications, Inc.

Chart 21 / MD PSC / 2002 Survey of Residential and Commercial Customers

Interest in being able to choose an electric supplier?

[Among all respondents: compared over time]

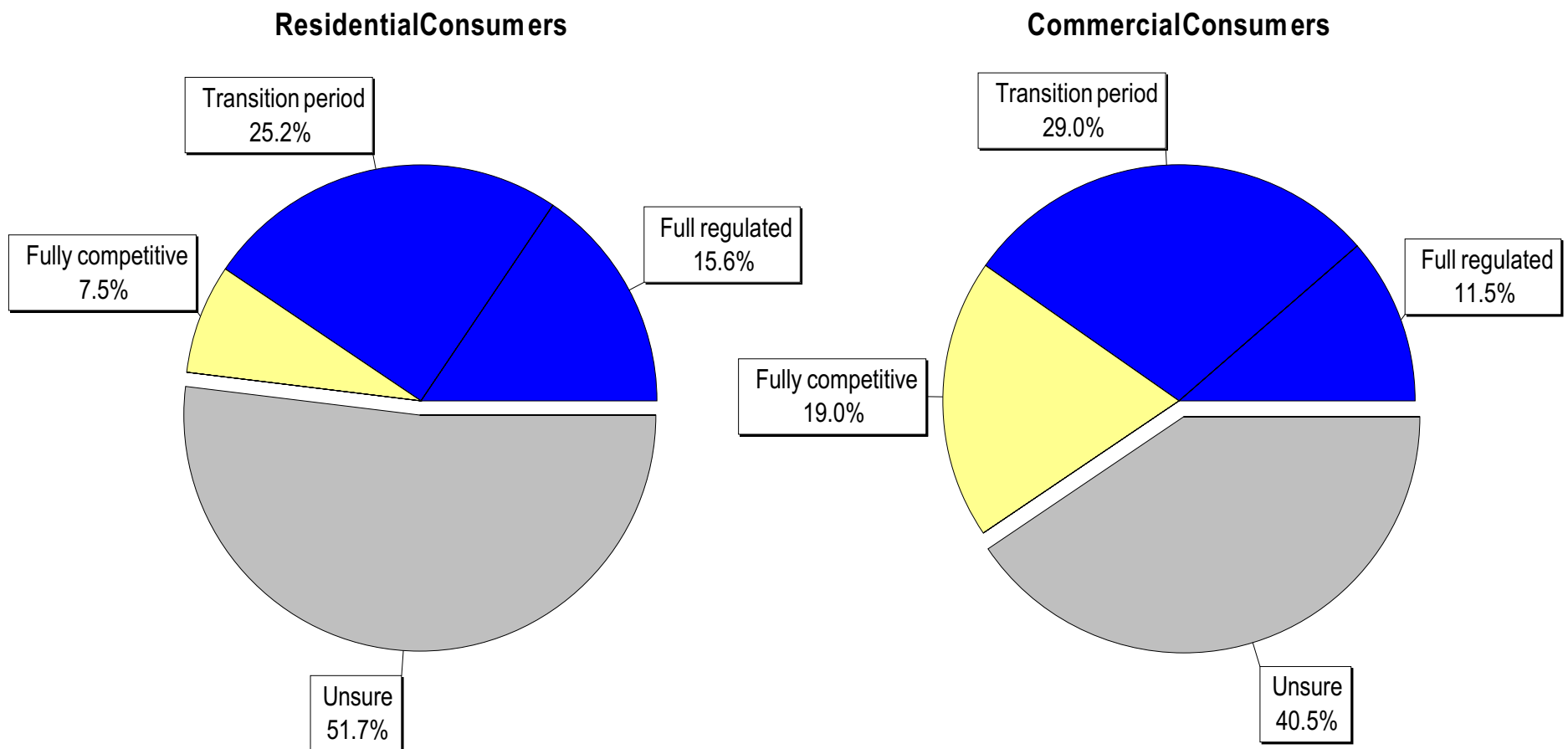


Source: RKM Research and Communications, Inc.

Chart 22 / MD PSC / 2002 Survey of Residential and Commercial Customers

Status of electric competition in Maryland?

[Among all respondents]

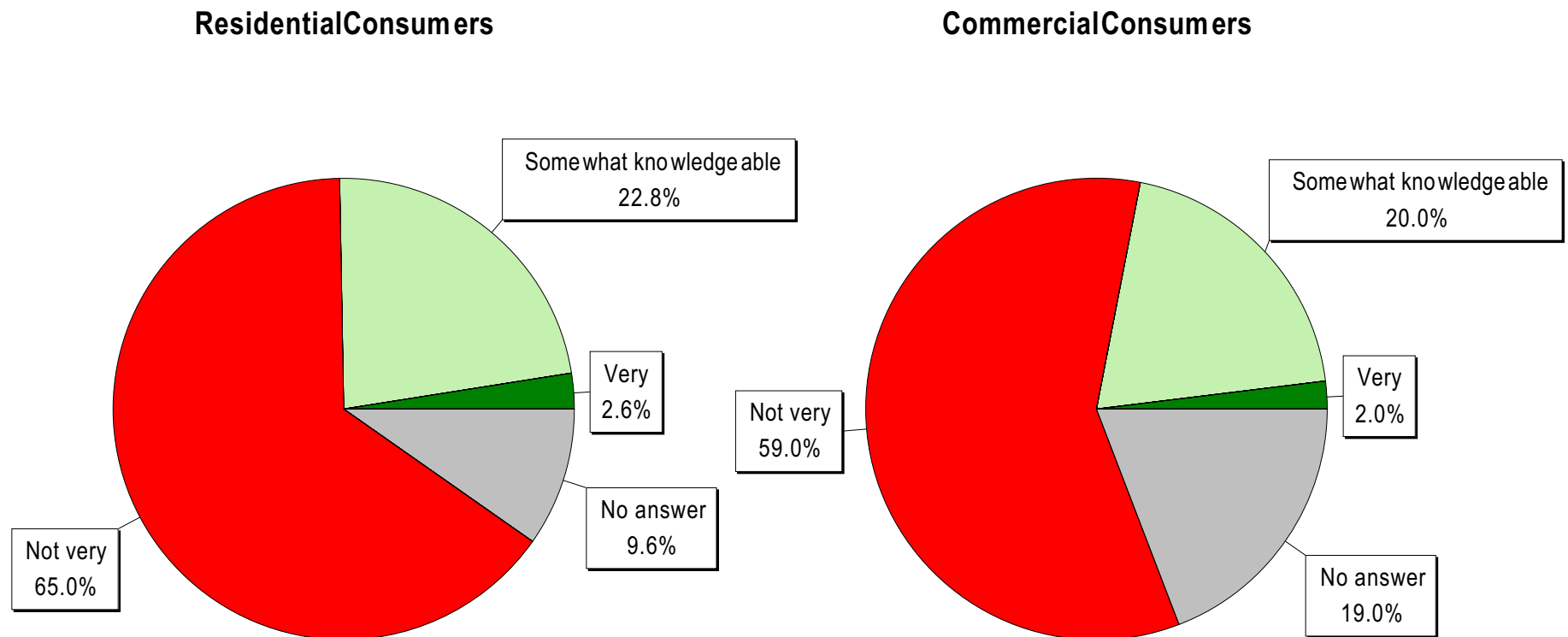


Source: RKM Research and Communications, Inc.

Chart 23 / MD PSC / 2002 Survey of Residential and Commercial Customers

Knowledge of the end of the standard service offer?

[Among all respondents]

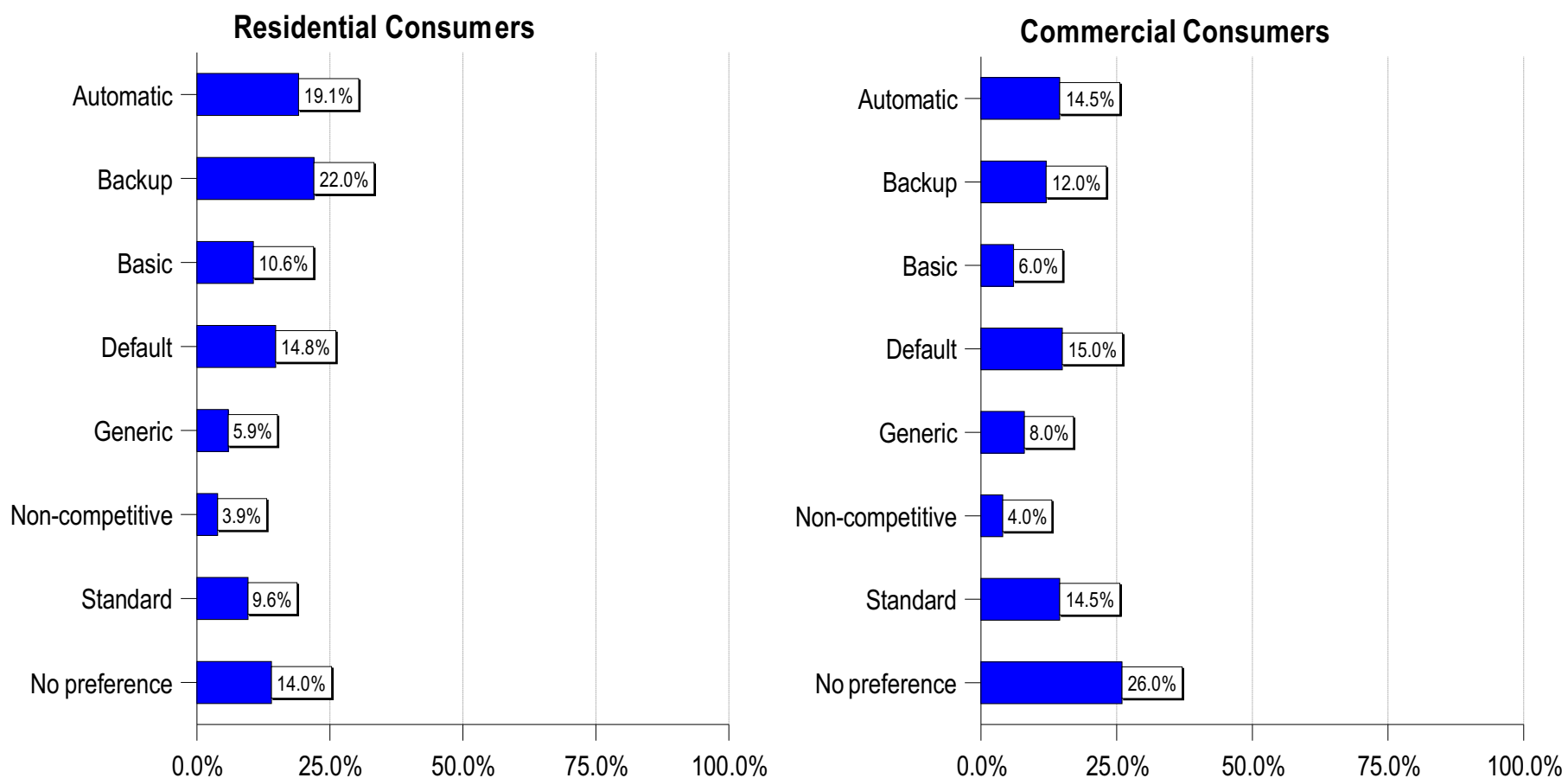


Source: RKM Research and Communications, Inc.

Chart 24 / MD PSC / 2002 Survey of Residential and Commercial Customers

Best term to describe service available to consumers who do not choose a supplier?

[Among all respondents]

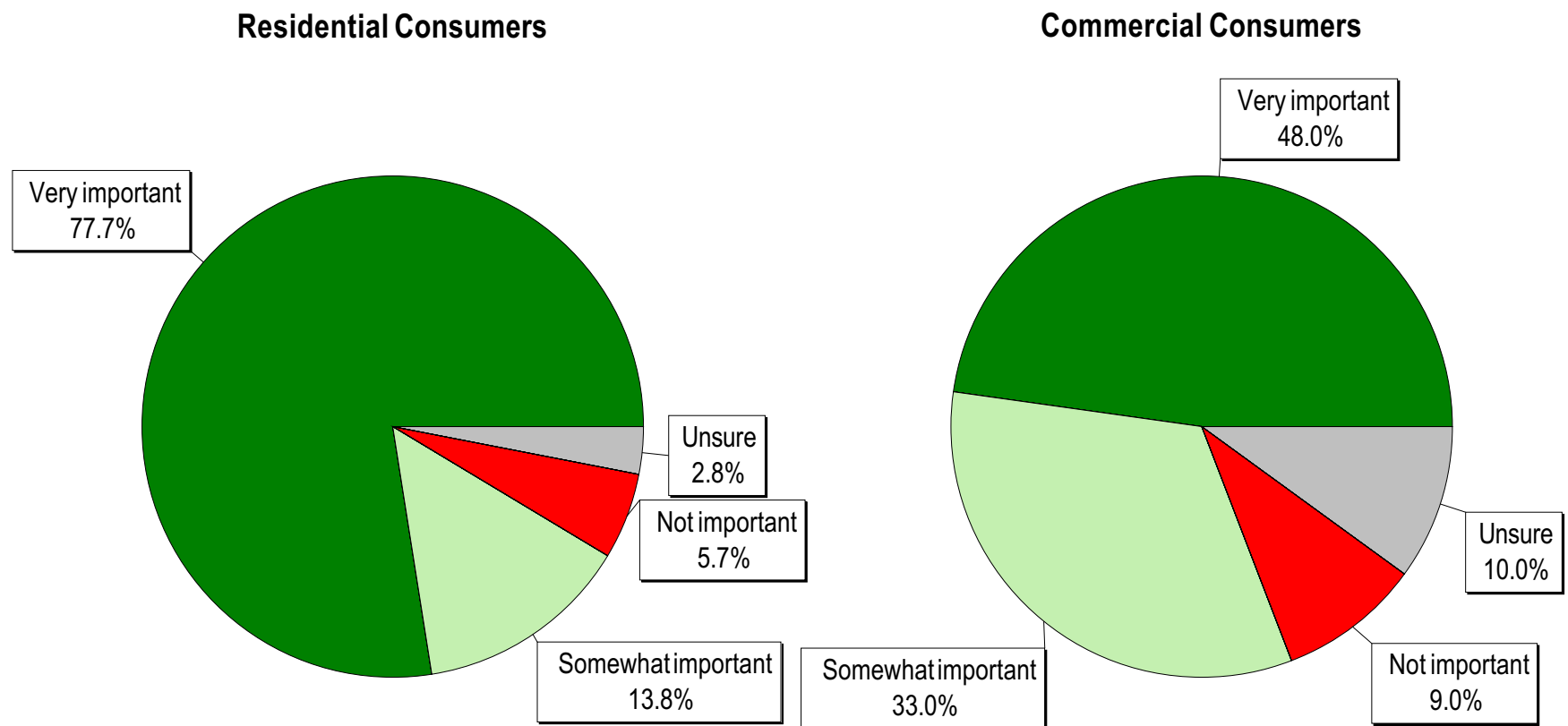


Source: RKM Research and Communications, Inc.

Chart 25 / MD PSC / 2002 Survey of Residential and Commercial Customers

Importance of being kept informed about the status of electric competition over the next 3 years?

[Among all respondents]

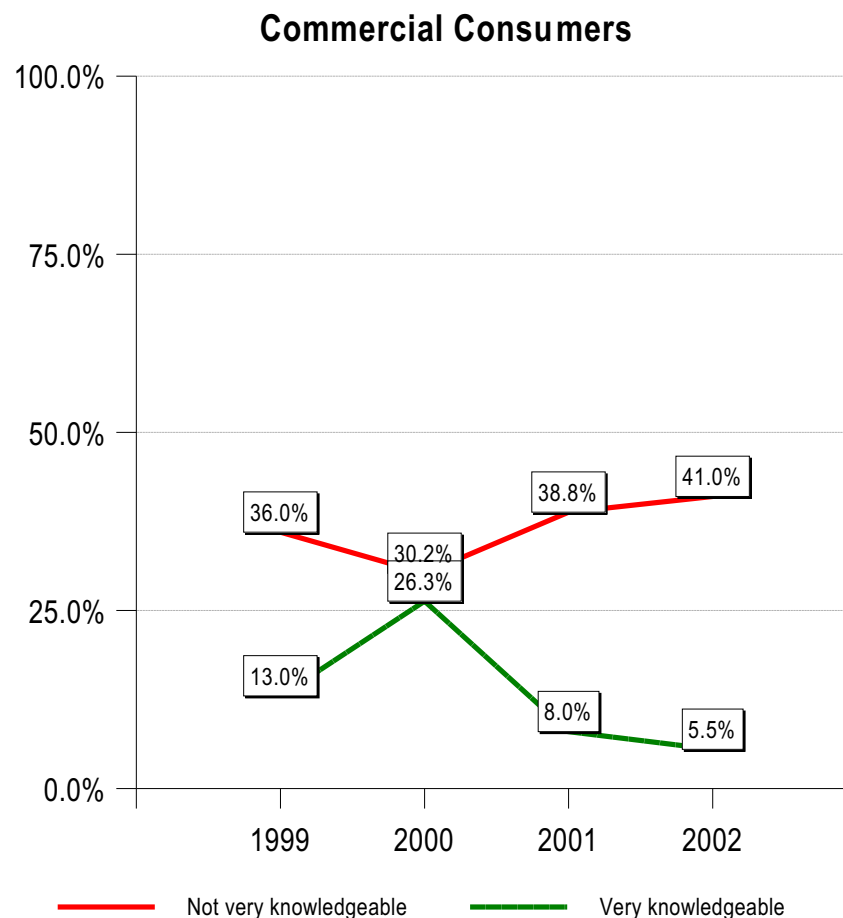
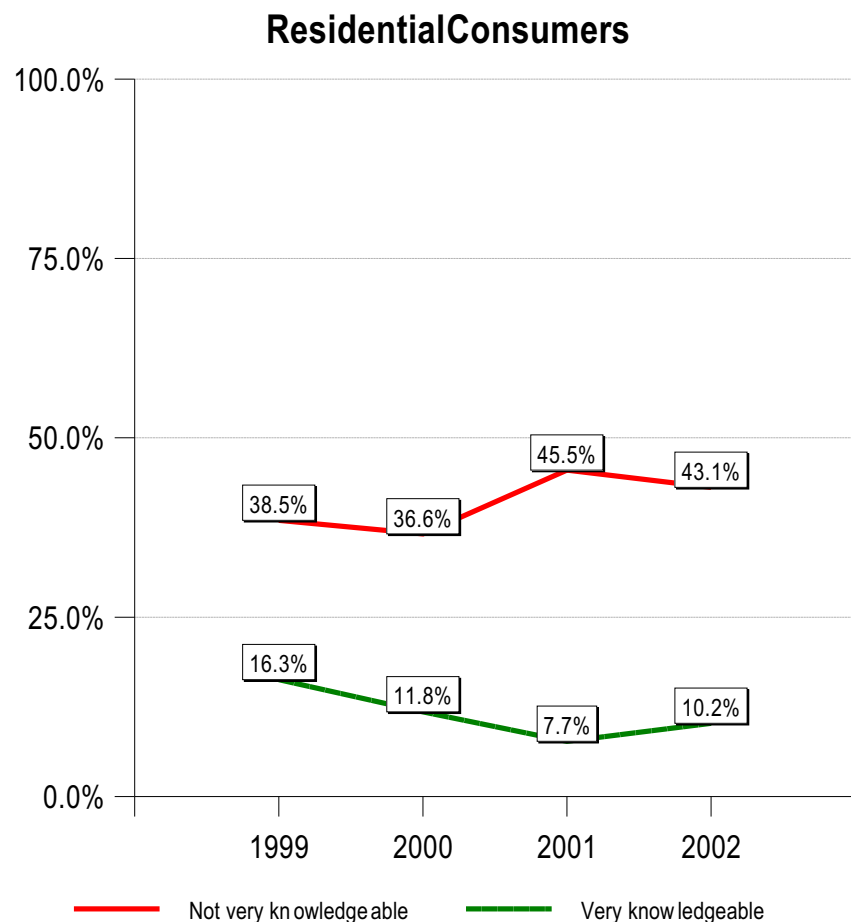


Source: RKM Research and Communications, Inc.

Chart 26 / MD PSC / 2002 Survey of Residential and Commercial Customers

Self-reported knowledge of electric industry?

[Among all respondents: compared over time]

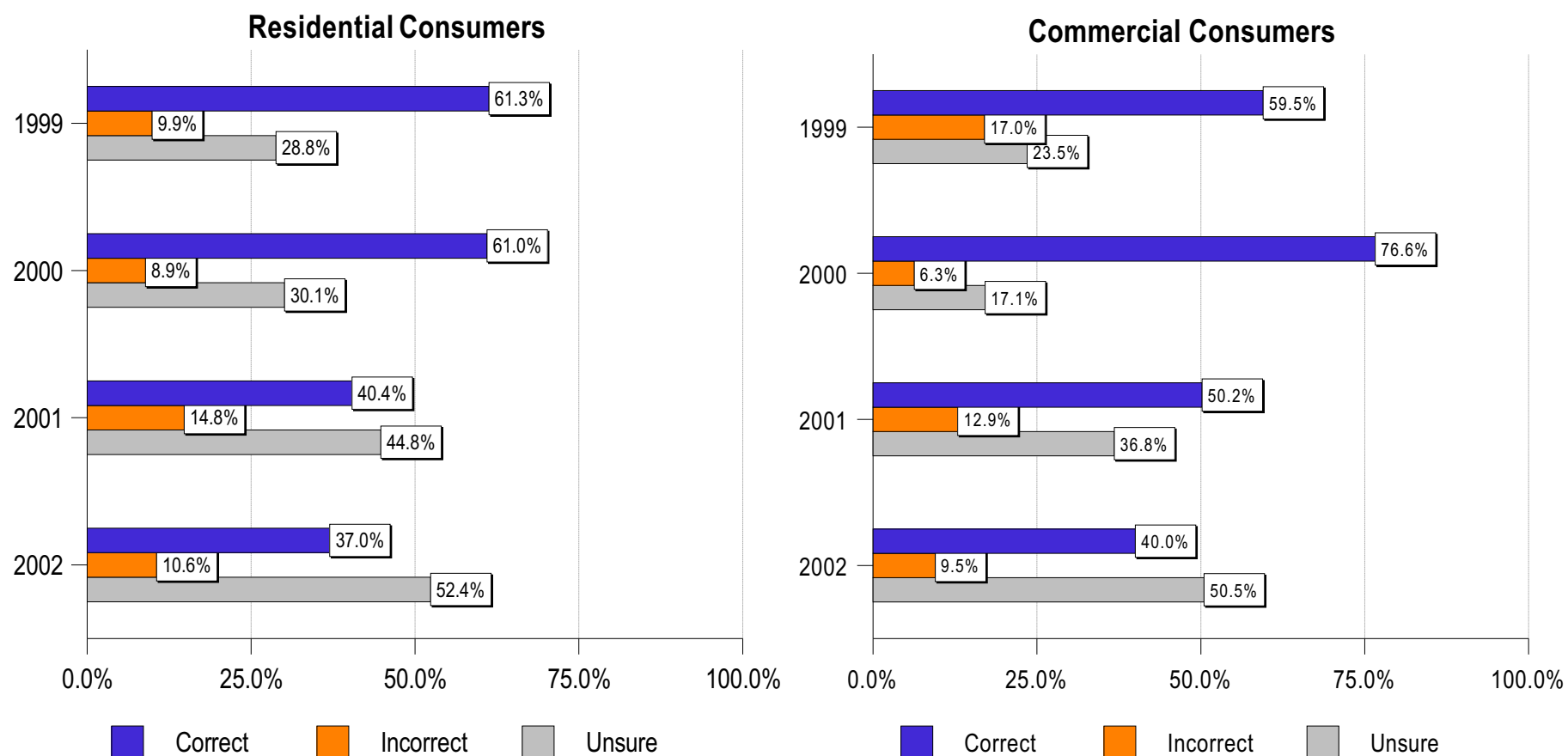


Source: RKM Research and Communications, Inc.

Chart 27 / MD PSC / 2002 Survey of Residential and Commercial Customers

The cost to transmit electricity will continue to be regulated by the PSC? (Correct Answer: Yes)

[Among all respondents]

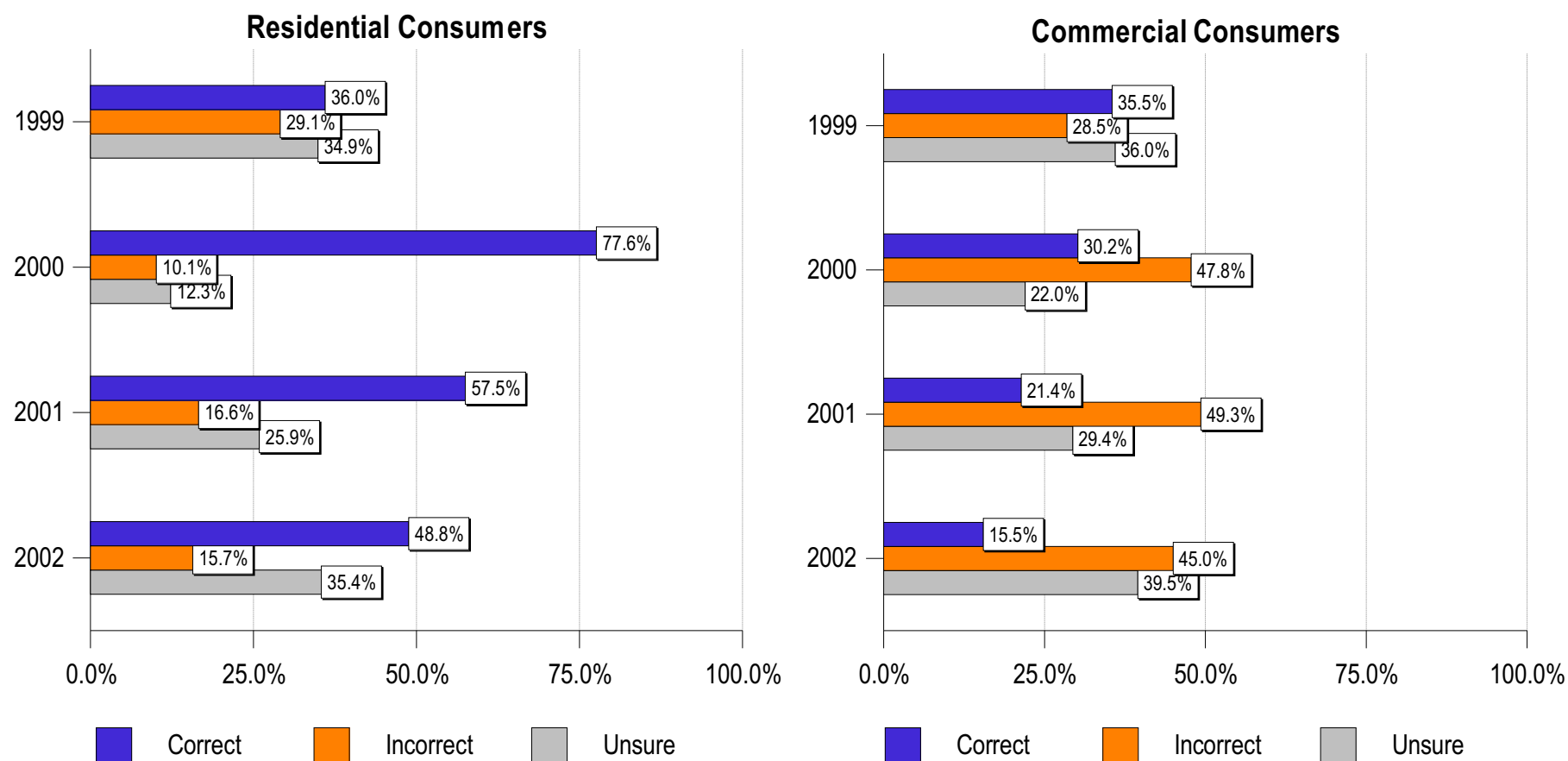


Source: RKM Research and Communications, Inc.

Chart 28 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among all respondents]

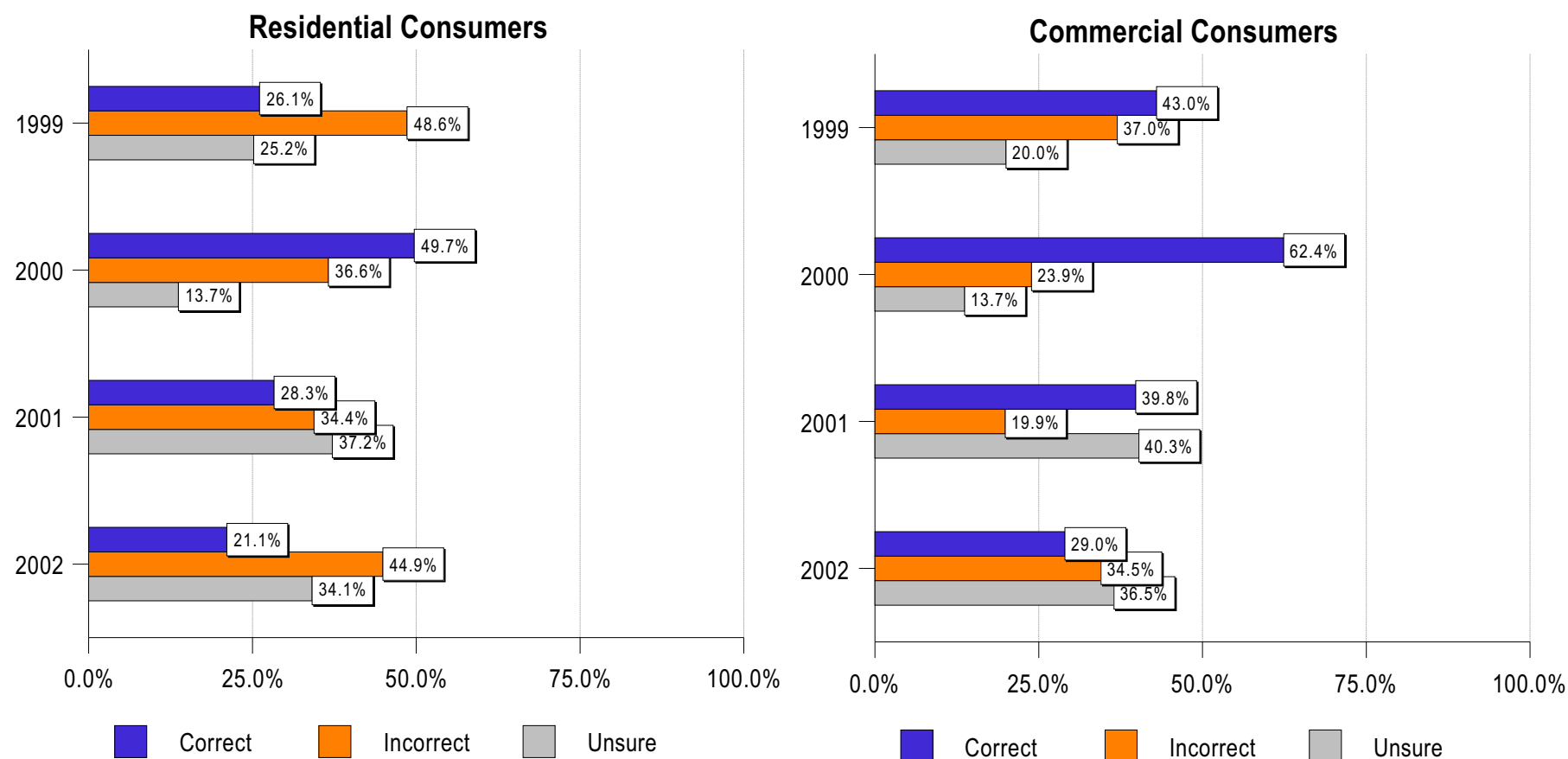


Source: RKM Research and Communications, Inc.

Chart 29 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among all respondents]

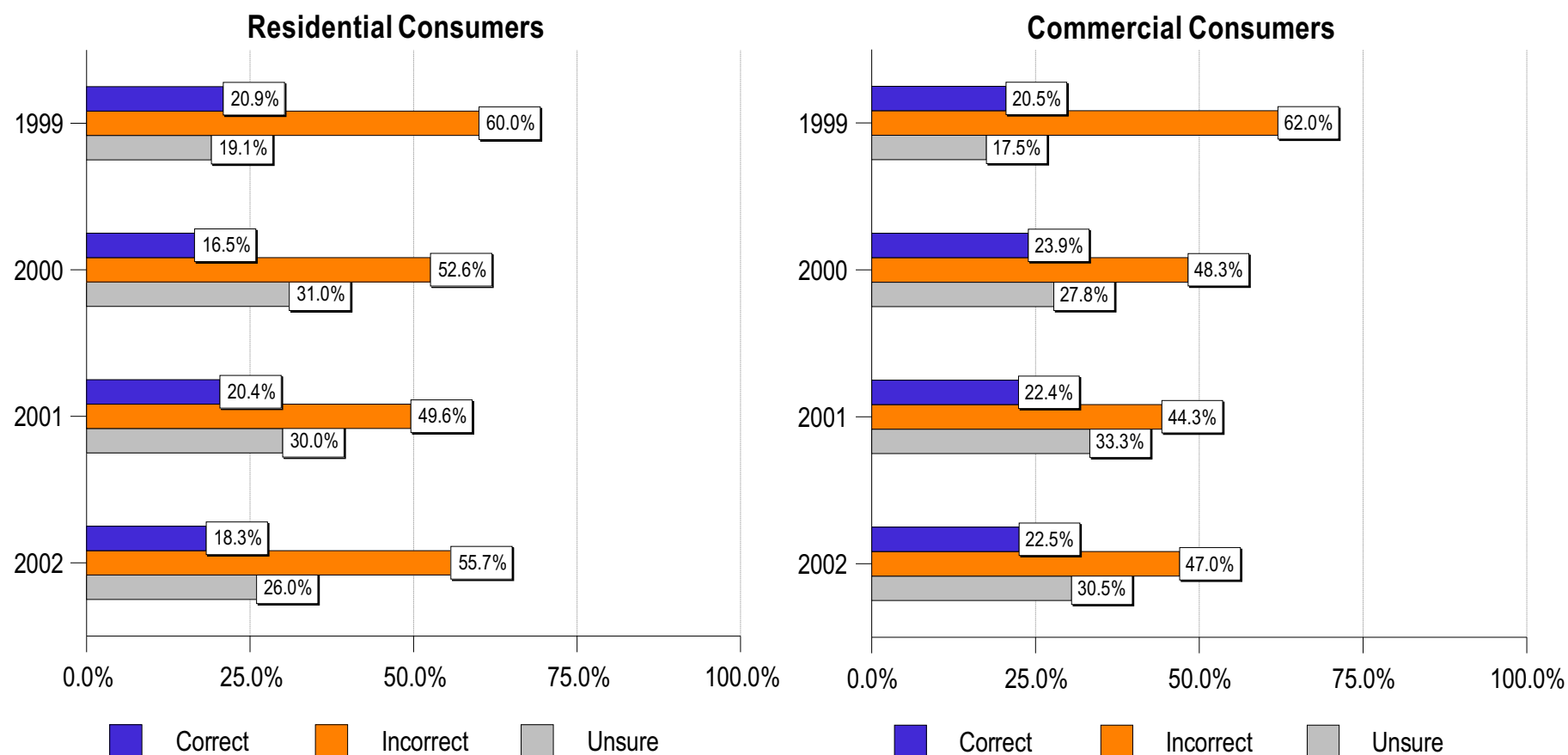


Source: RKM Research and Communications, Inc.

Chart 30 / MD PSC / 2002 Survey of Residential and Commercial Customers

Customers must notify the current utility to switch to a new supplier? (Correct Answer: No)

[Among all respondents]

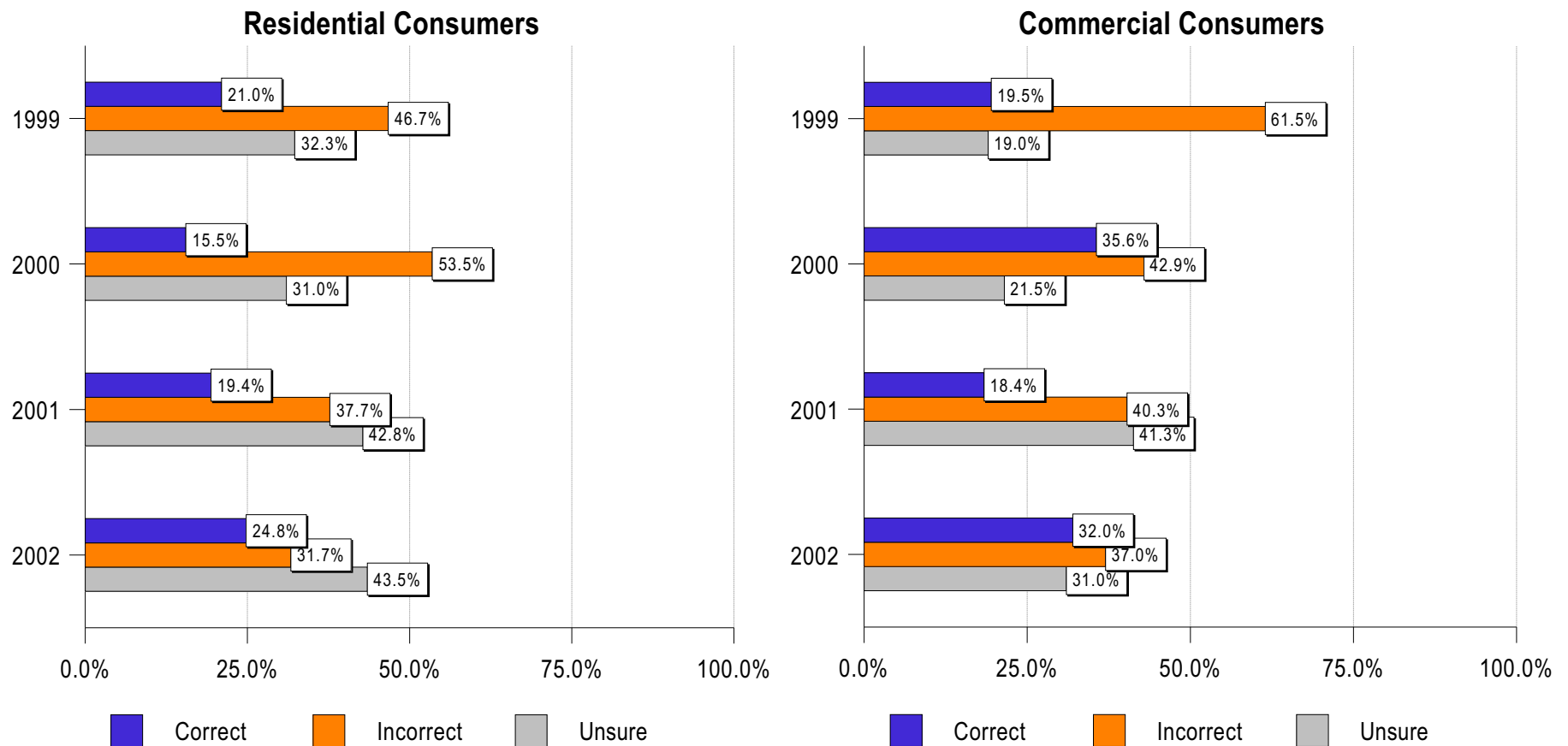


Source: RKM Research and Communications, Inc.

Chart 31 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among all respondents]

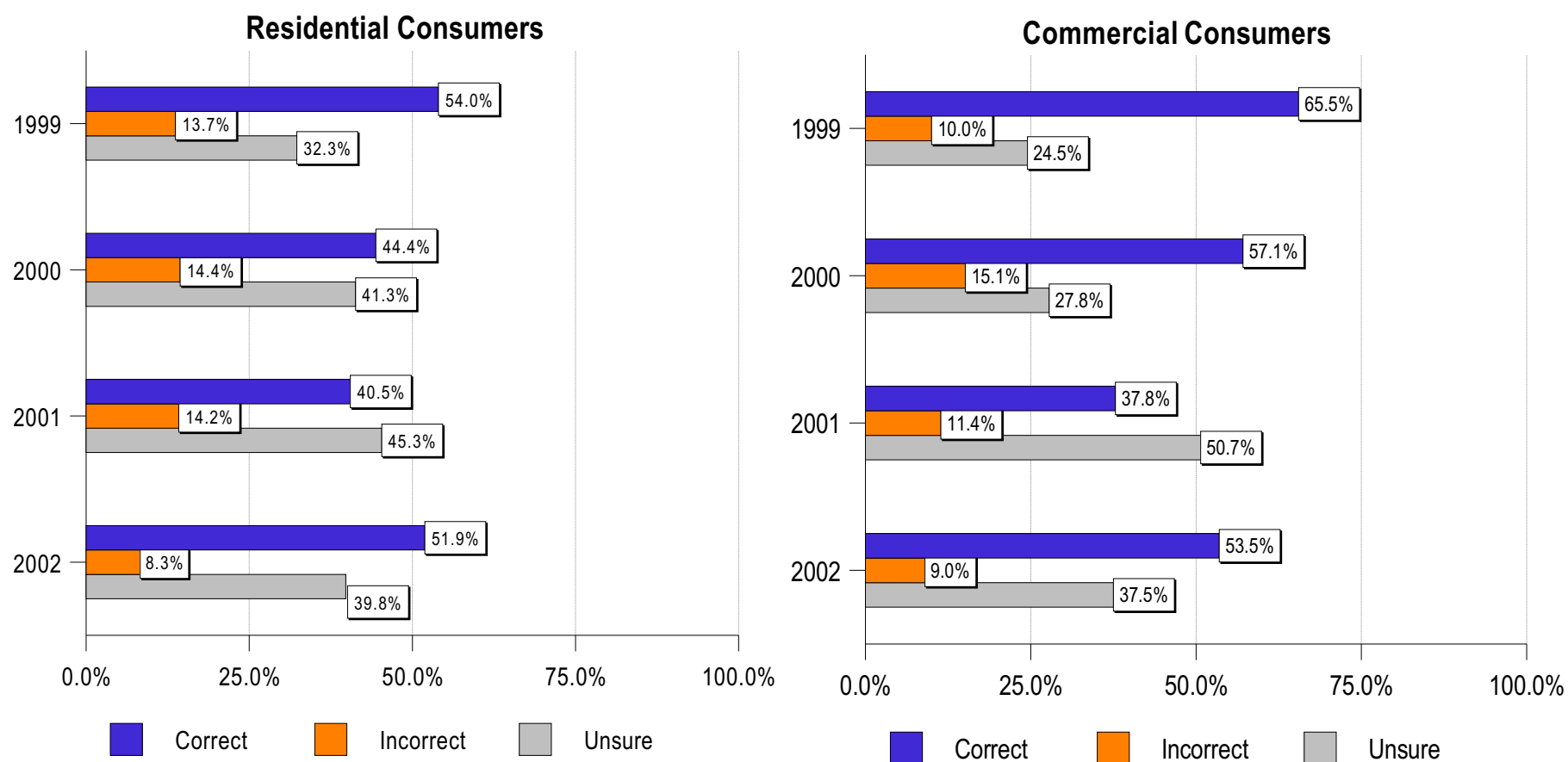


Source: RKM Research and Communications, Inc.

Chart 32 / MD PSC / 2002 Survey of Residential and Commercial Customers

Once in default service, customer can switch to a new supplier? (Correct Answer: Yes)

[Among all respondents]

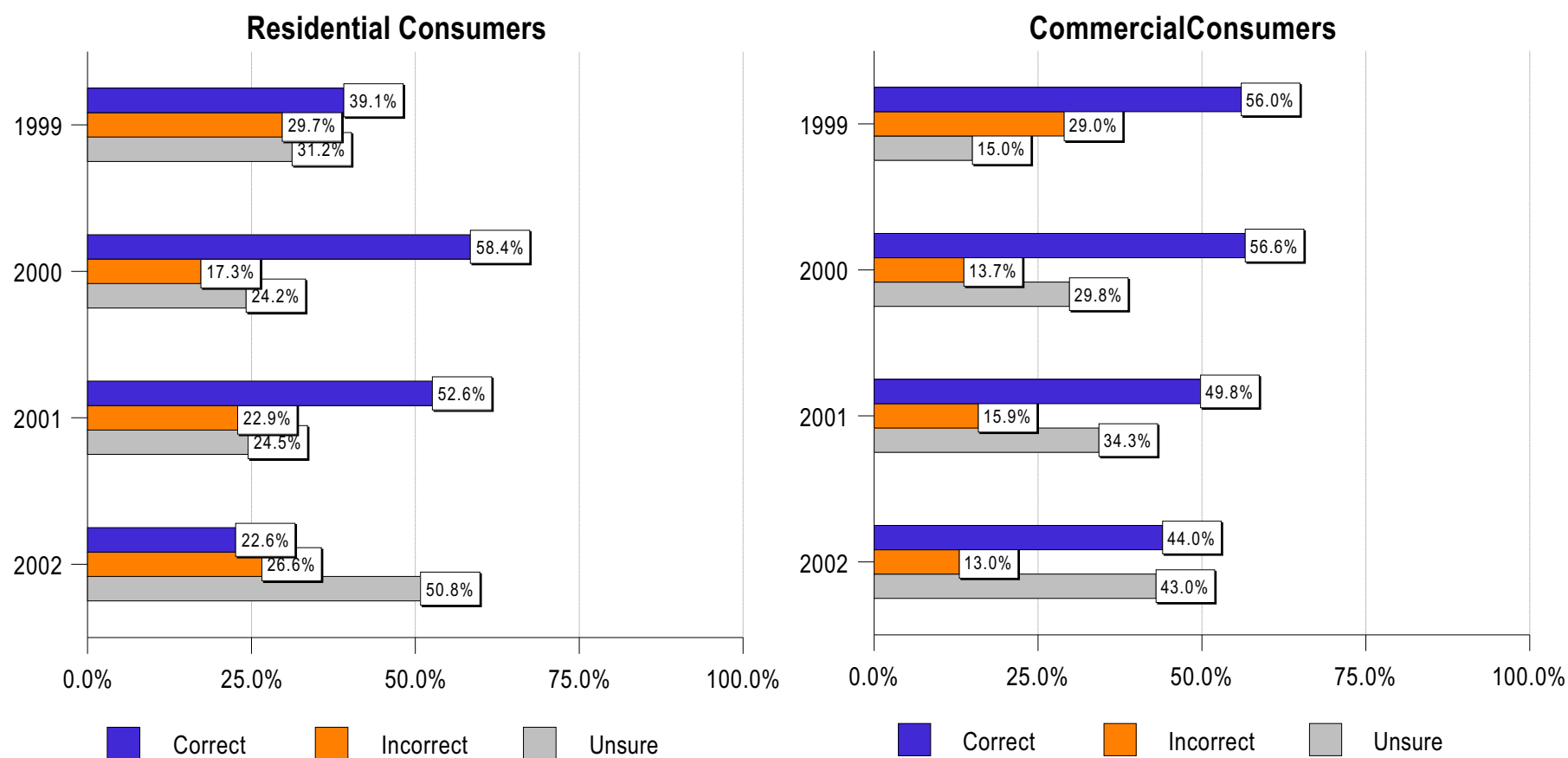


Source: RKM Research and Communications, Inc.

Chart 33 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among all respondents]

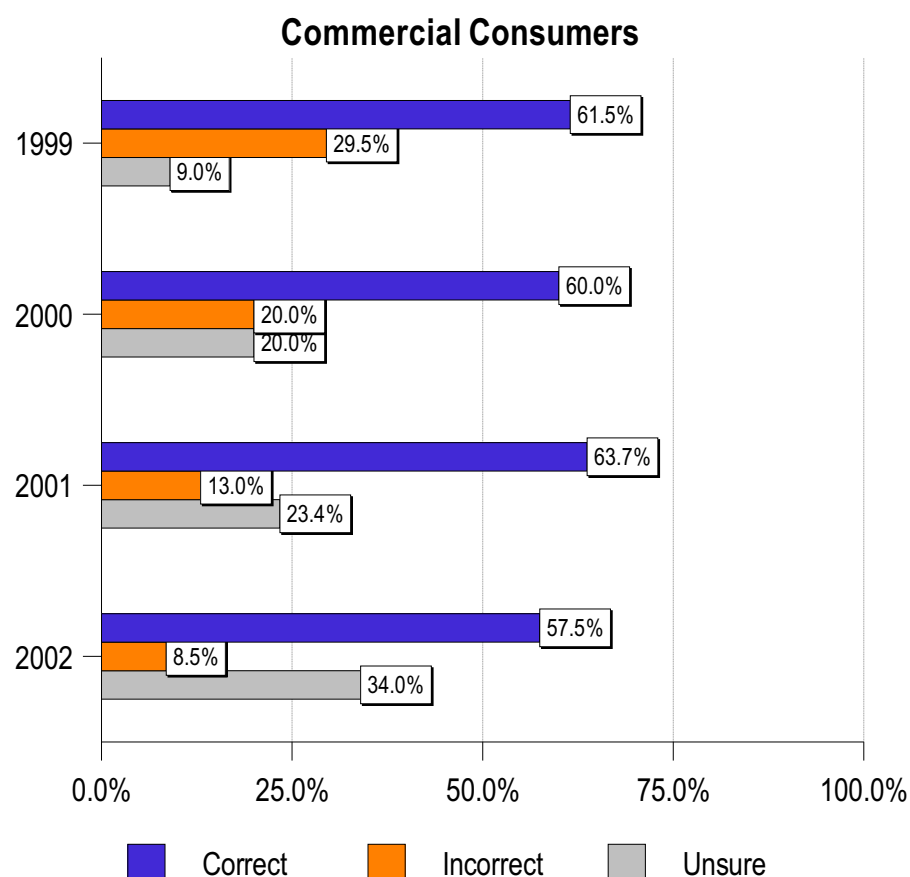
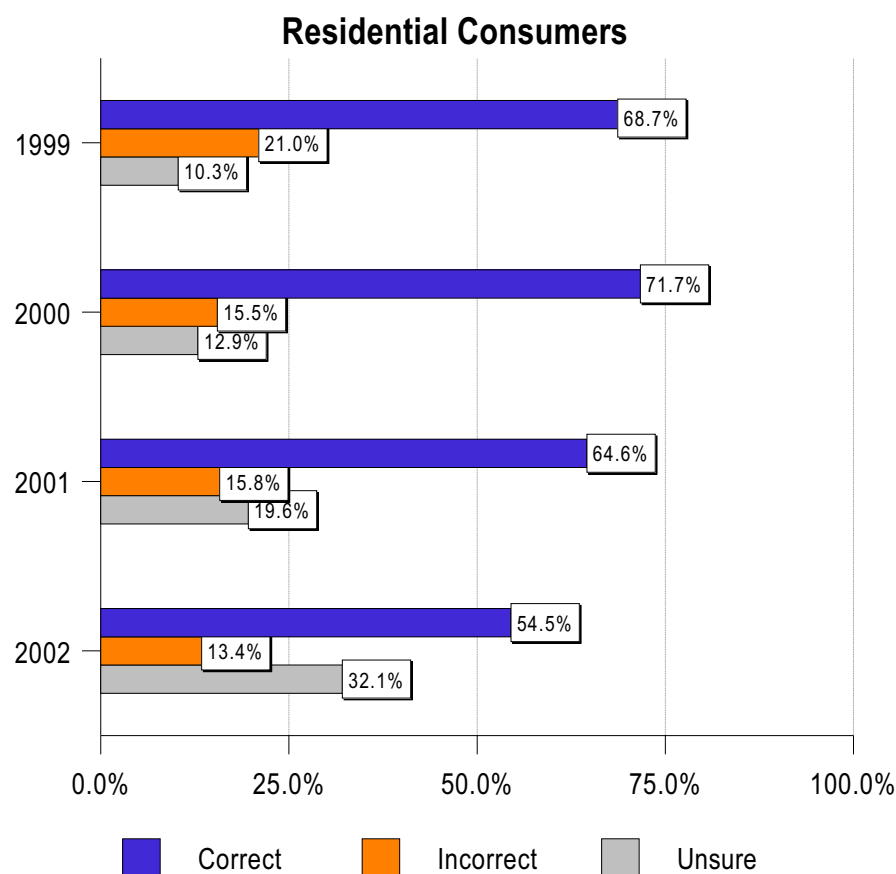


Source: RKM Research and Communications, Inc.

Chart 34 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among all respondents]

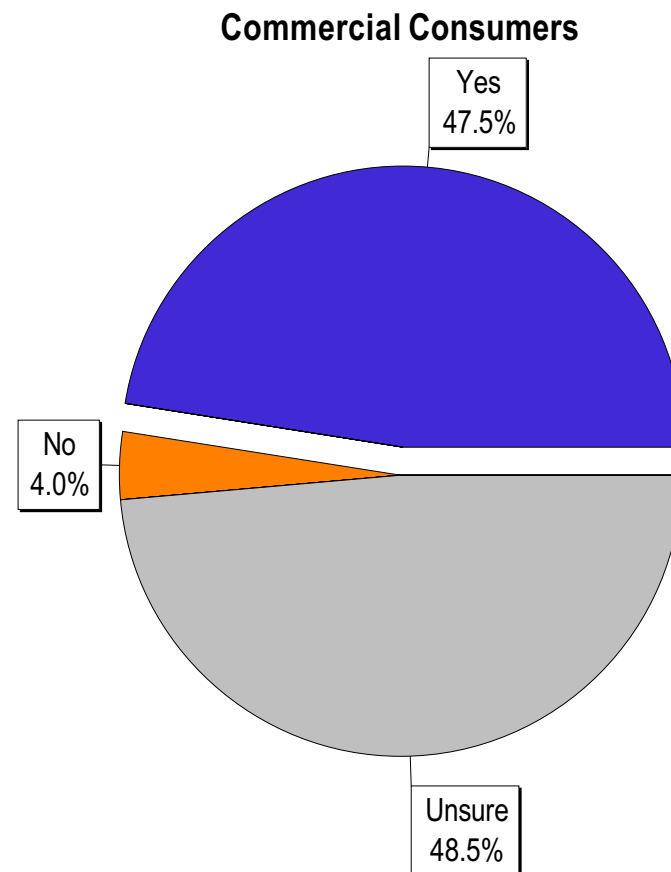
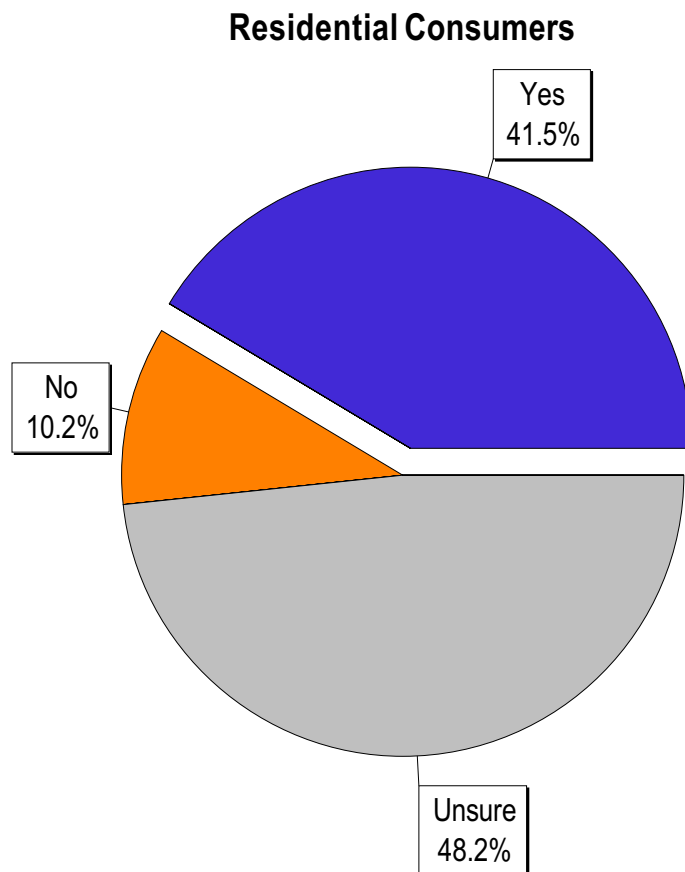


Source: RKM Research and Communications, Inc.

Chart 35 / MD PSC / 2002 Survey of Residential and Commercial Customers

The change from standard to competitive service will happen at different times? (Correct Answer: Yes)

[Among all respondents]

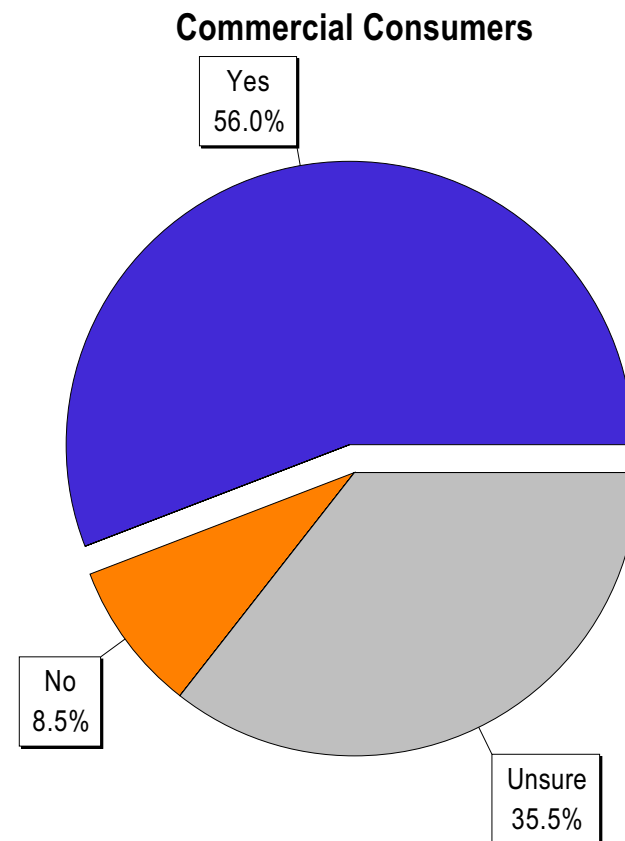
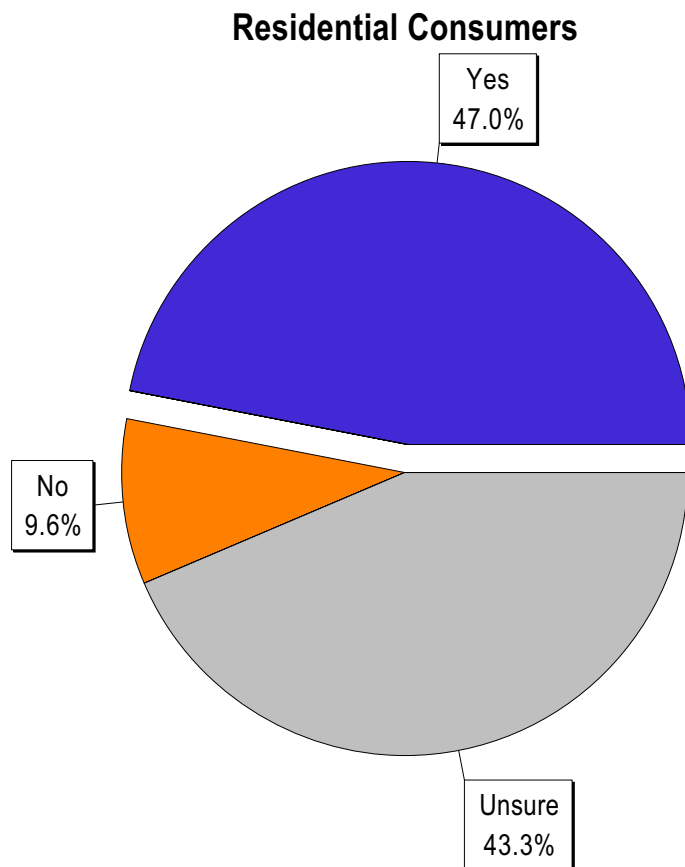


Source: RKM Research and Communications, Inc.

Chart 36 / MD PSC / 2002 Survey of Residential and Commercial Customers

If a supplier goes out of business, the customer is switched to default service? (Correct Answer: Yes)

[Among all respondents]

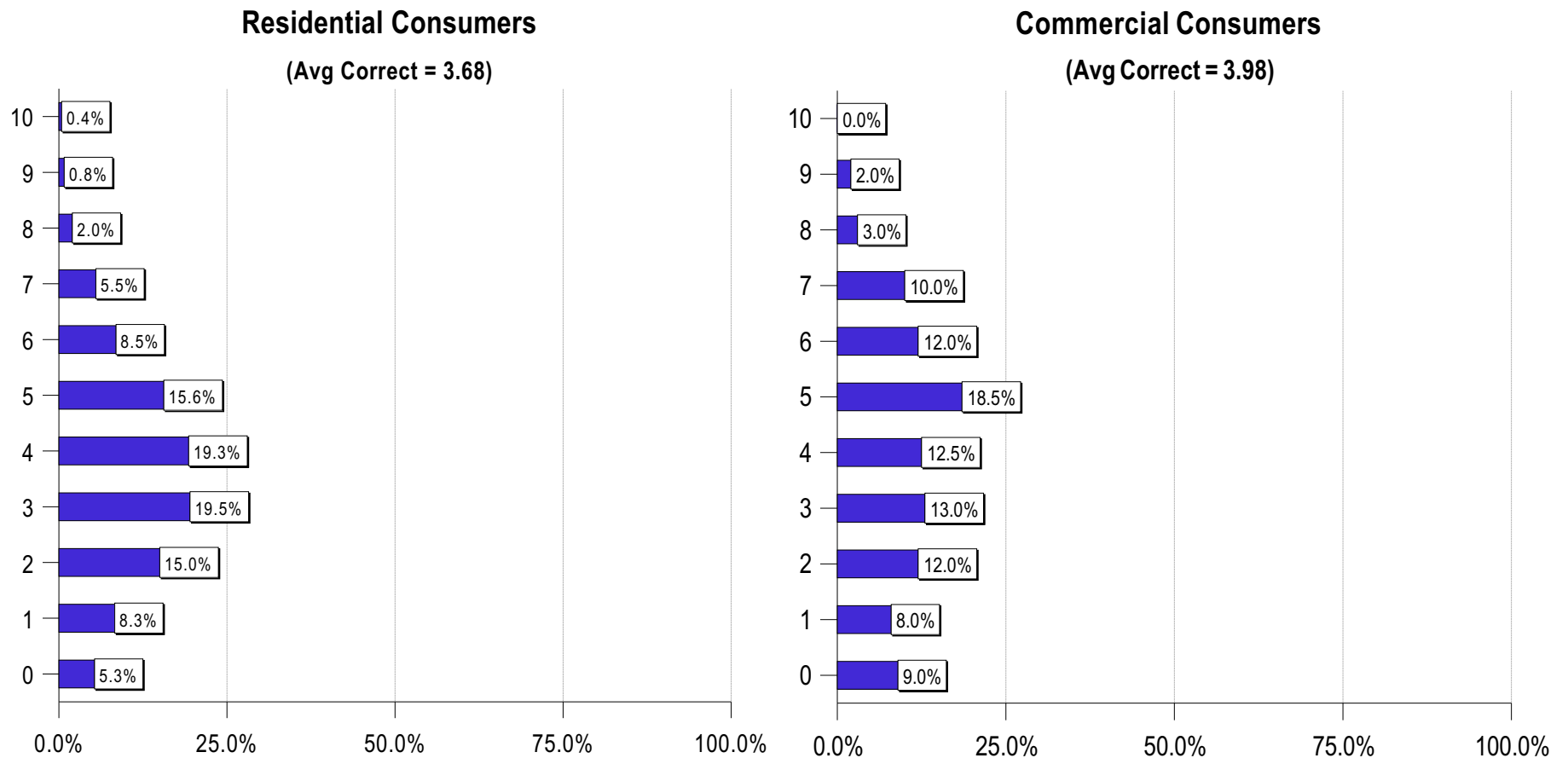


Source: RKM Research and Communications, Inc.

Chart 37 / MD PSC / 2002 Survey of Residential and Commercial Customers

Total Knowledge Index (Based on 10 Knowledge Questions):

[Among all respondents]

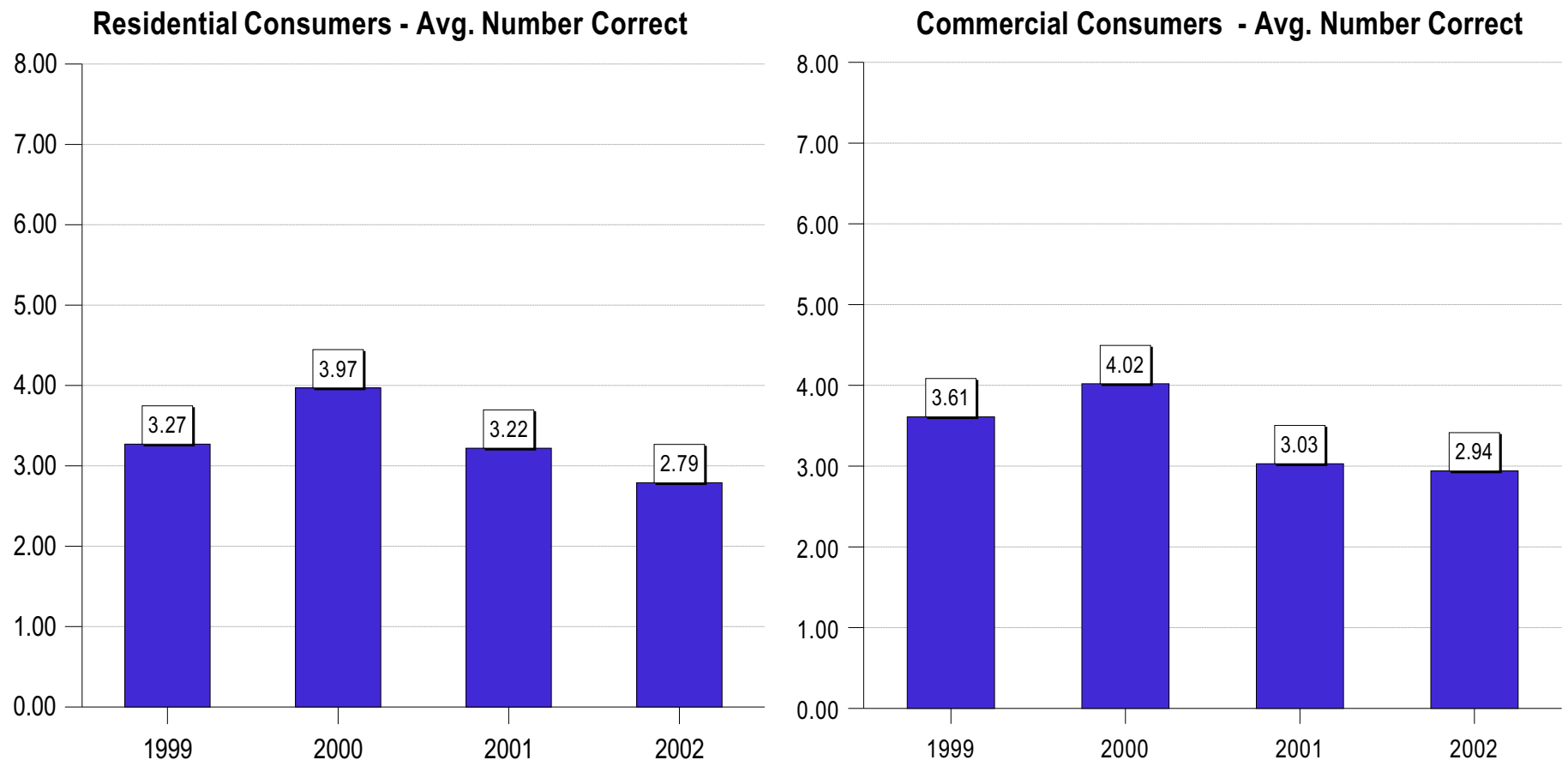


Source: RKM Research and Communications, Inc.

Chart 38 / MD PSC / 2002 Survey of Residential and Commercial Customers

Revised Knowledge Index (Based on 8 knowledge questions asked each year):

[Among all respondents: compared over time]

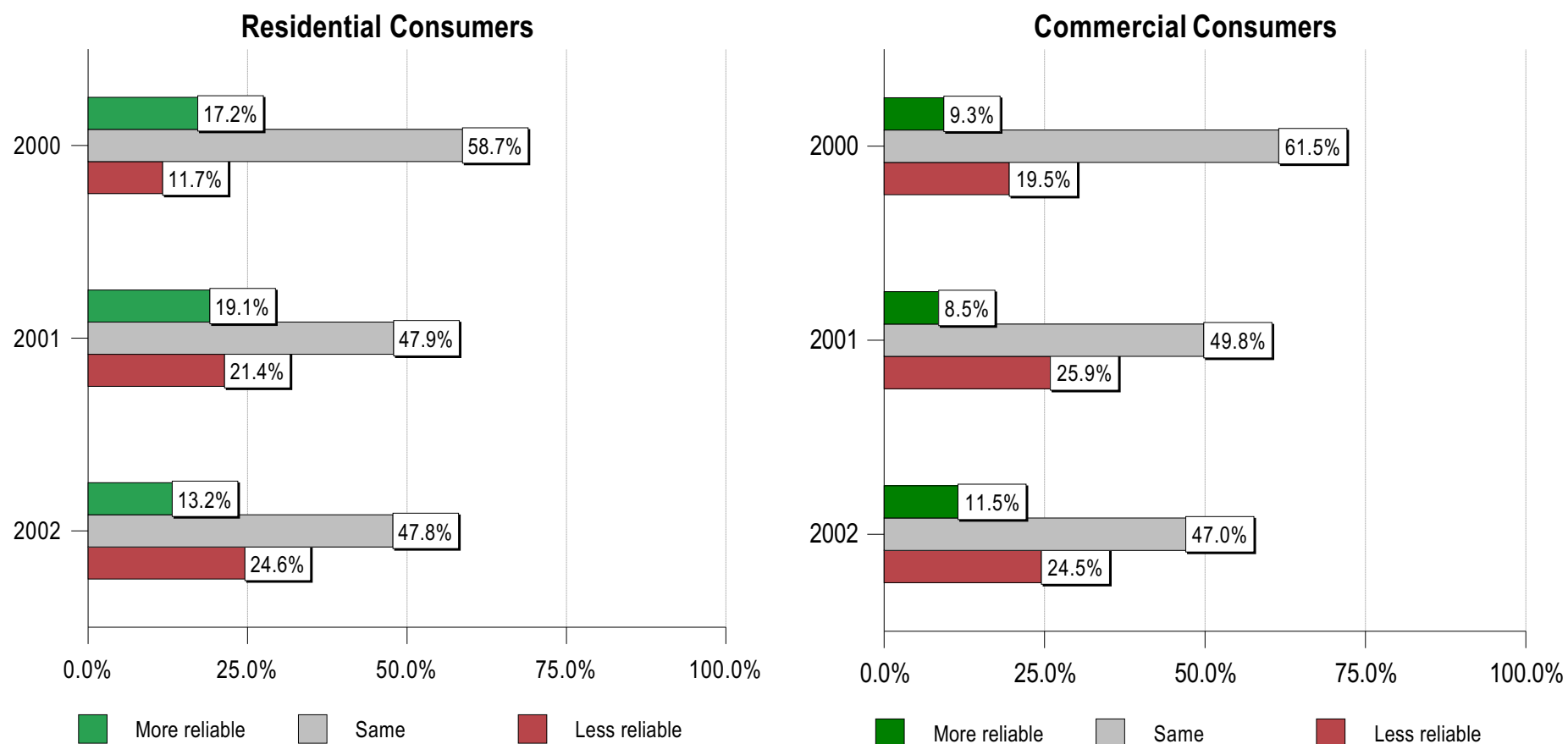


Source: RKM Research and Communications, Inc.

Chart 39 / MD PSC / 2002 Survey of Residential and Commercial Customers

How reliable will electric service be after standard service ends?

[Among all respondents: compared over time]

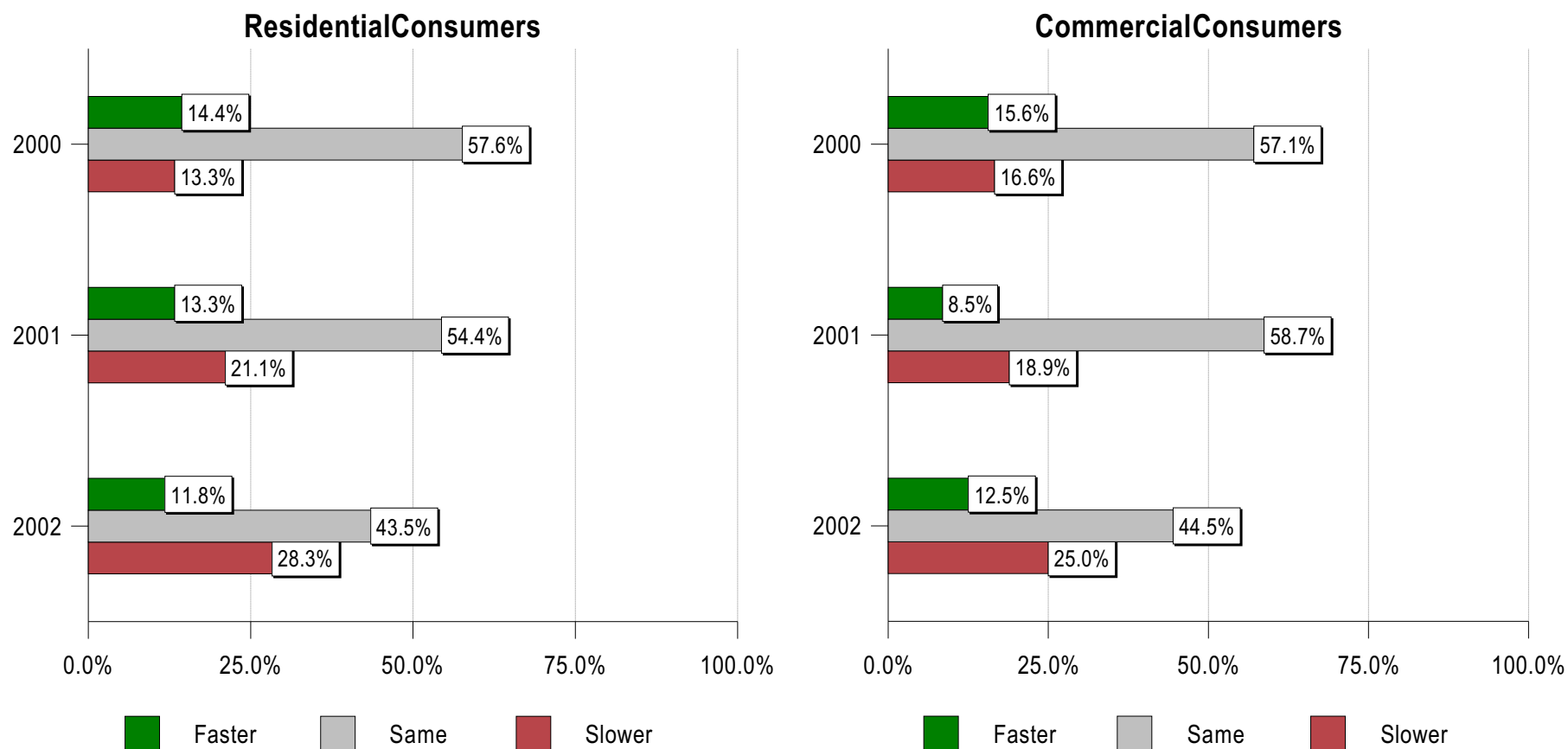


Source: RKM Research and Communications, Inc.

Chart 40 / MD PSC / 2002 Survey of Residential and Commercial Customers

How will responsiveness to emergencies change after standard service ends?

[Among all respondents: compared over time]

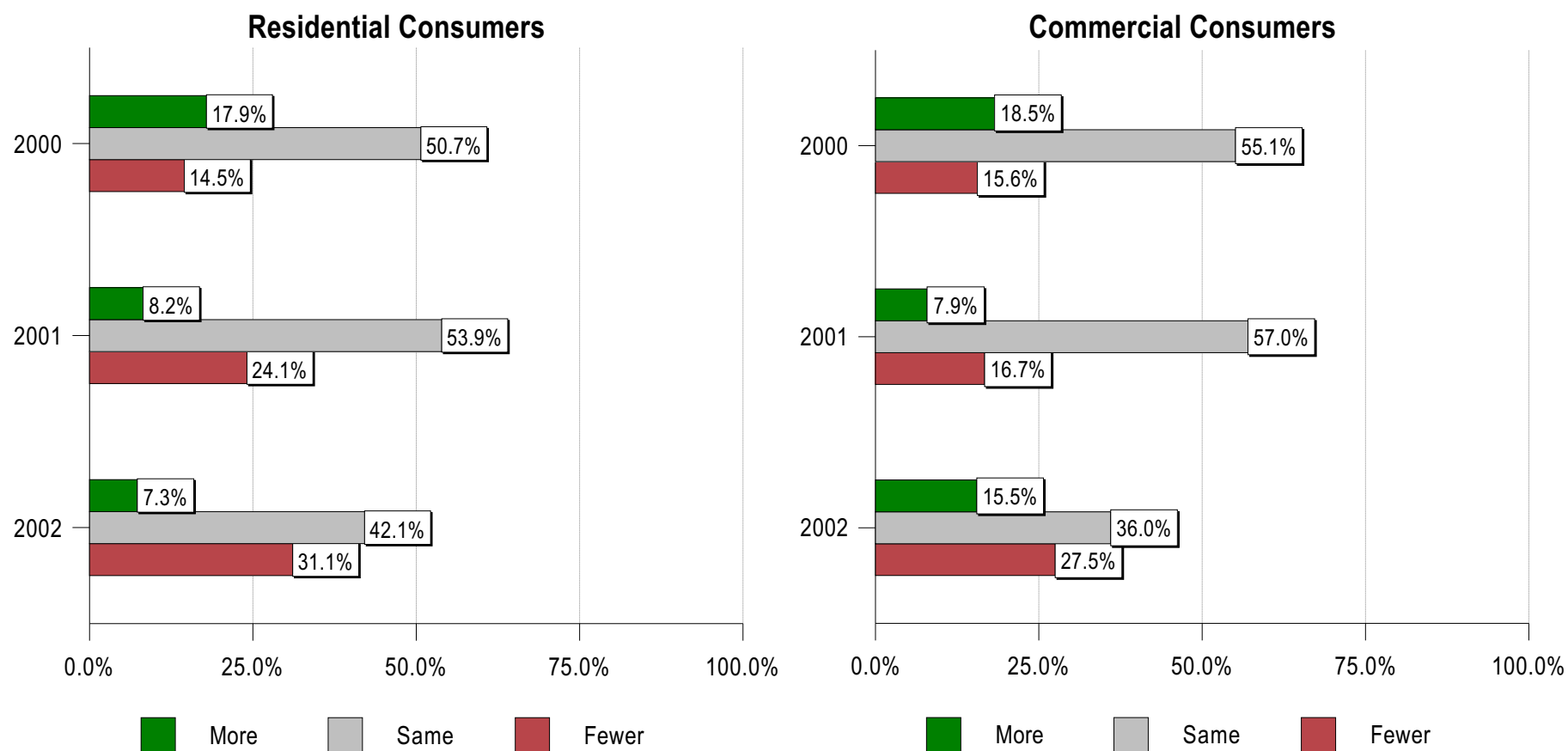


Source: RKM Research and Communications, Inc.

Chart 41 / MD PSC / 2002 Survey of Residential and Commercial Customers

How will consumer protections change after standard service ends?

[Among all respondents: compared over time]

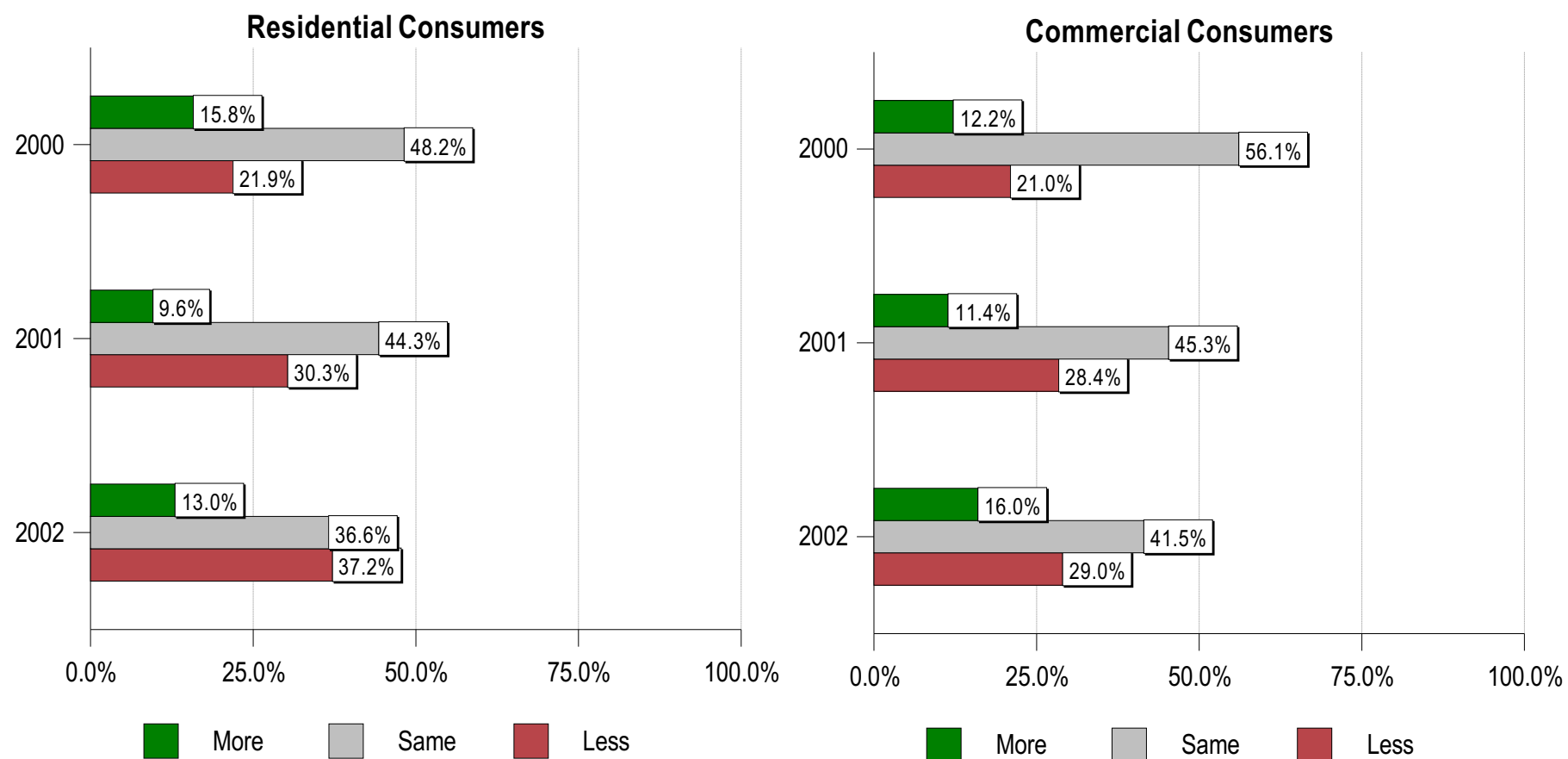


Source: RKM Research and Communications, Inc.

Chart 42 / MD PSC / 2002 Survey of Residential and Commercial Customers

How likely is the current utility to respond to service requests?

[Among all respondents: compared over time]

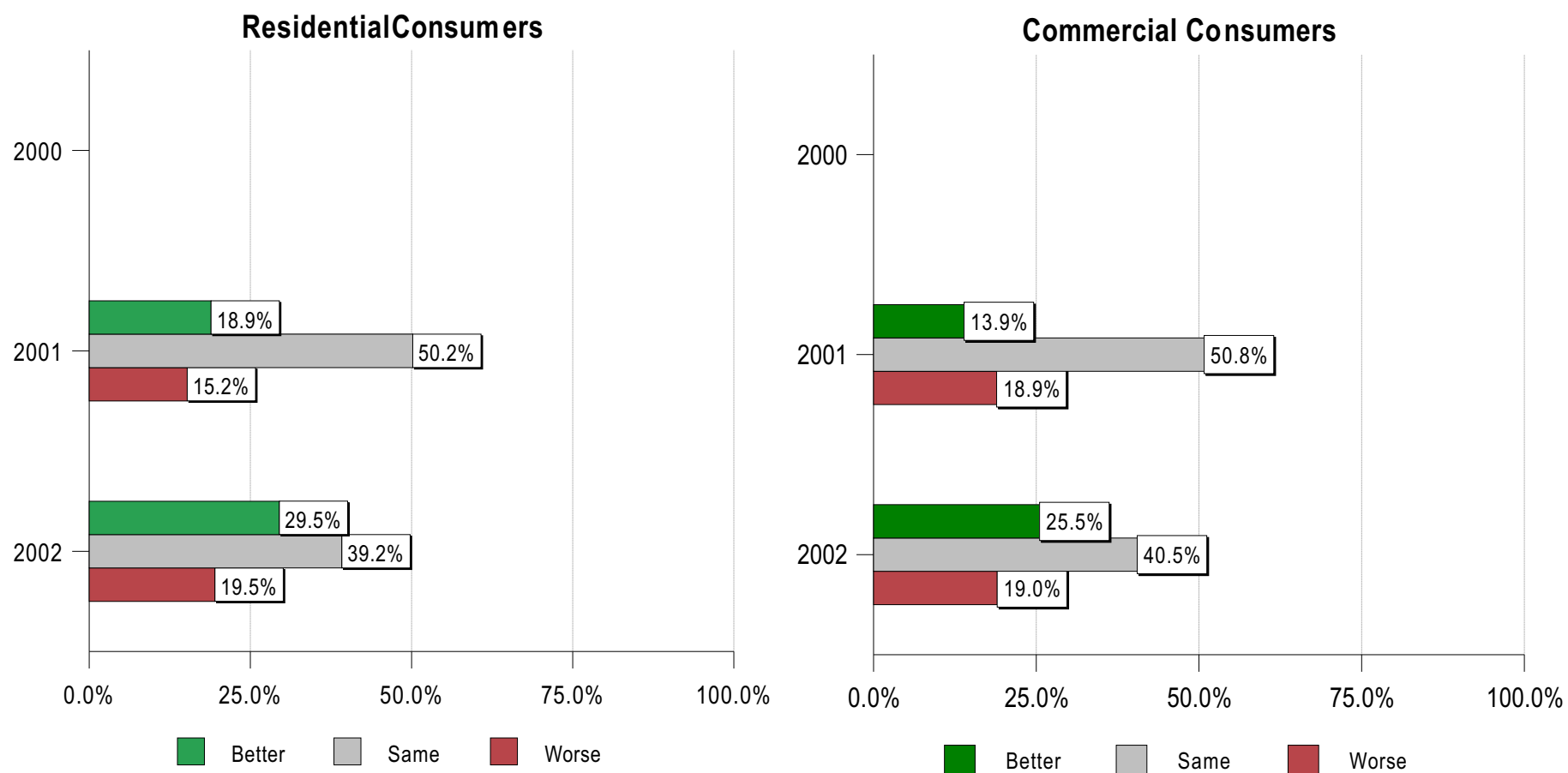


Source: RKM Research and Communications, Inc.

Chart 43 / MD PSC / 2002 Survey of Residential and Commercial Customers

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

[Among all respondents: compared over time]

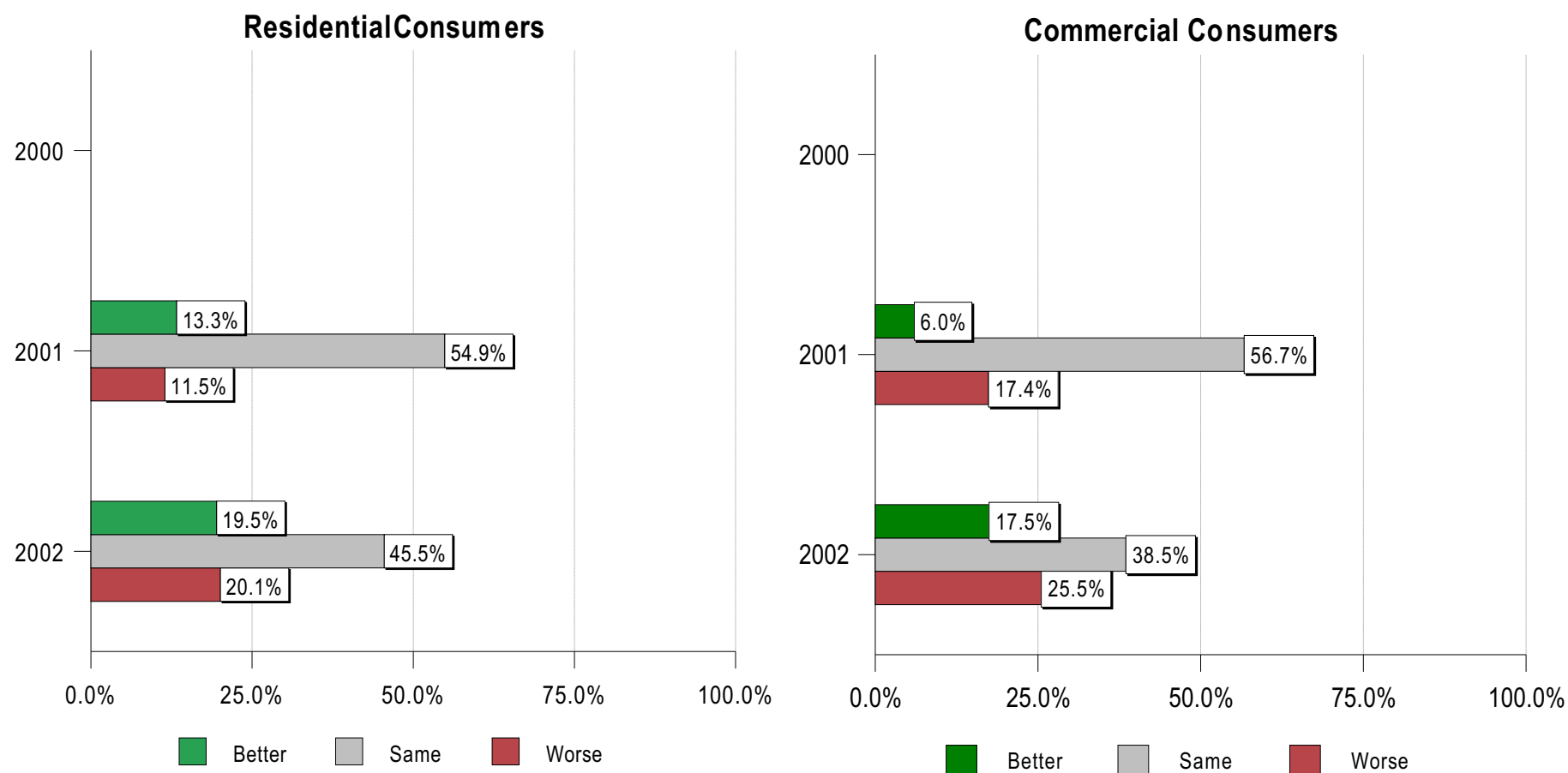


Source: RKM Research and Communications, Inc.

Chart 44 / MD PSC / 2002 Survey of Residential and Commercial Customers

Will problems with the transmission system get better or worse?

[Among all respondents: compared over time]

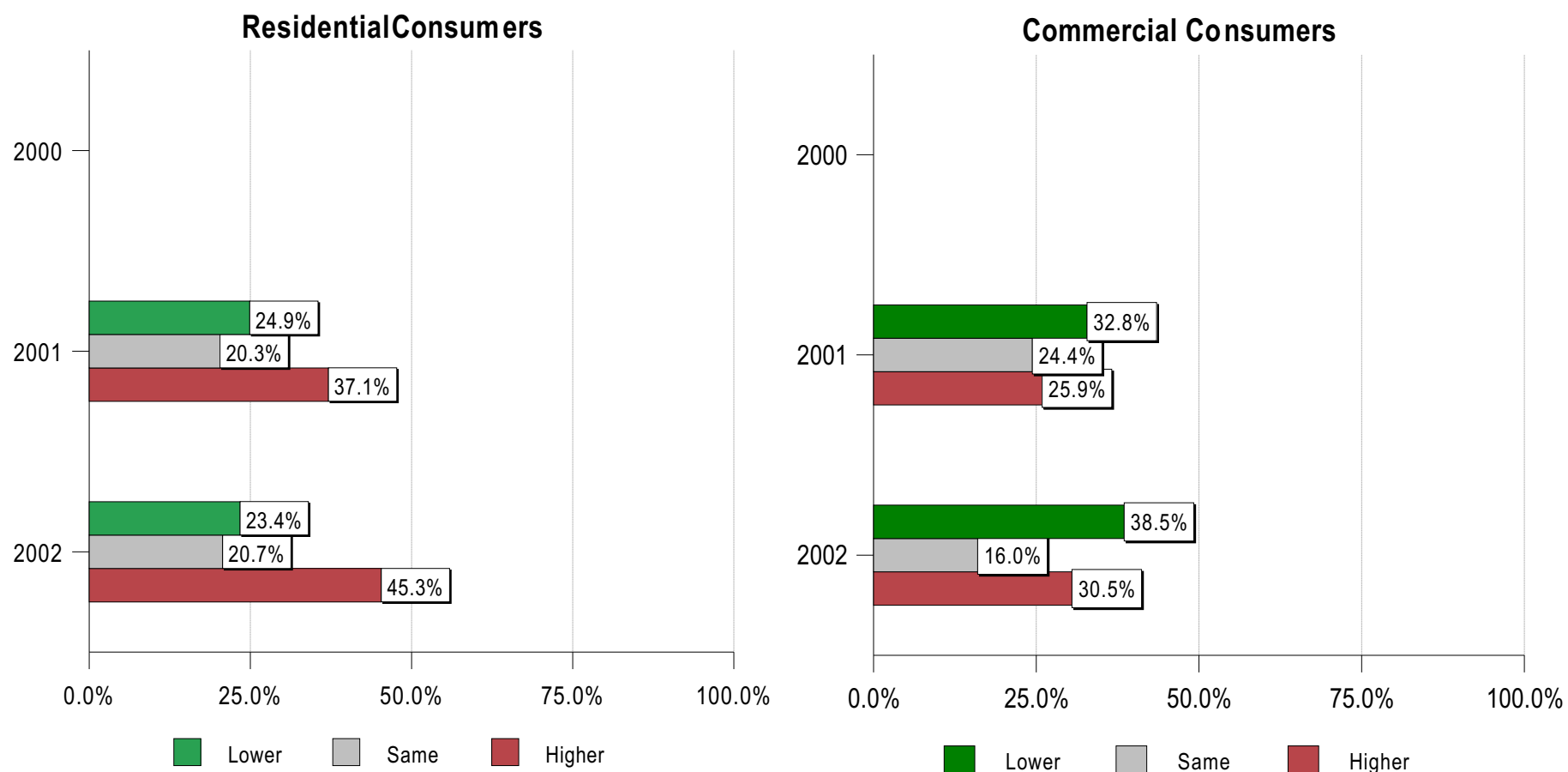


Source: RKM Research and Communications, Inc.

Chart 45 / MD PSC / 2002 Survey of Residential and Commercial Customers

How will competitive market forces affect the price you pay for electricity?

[Among all respondents: compared over time]

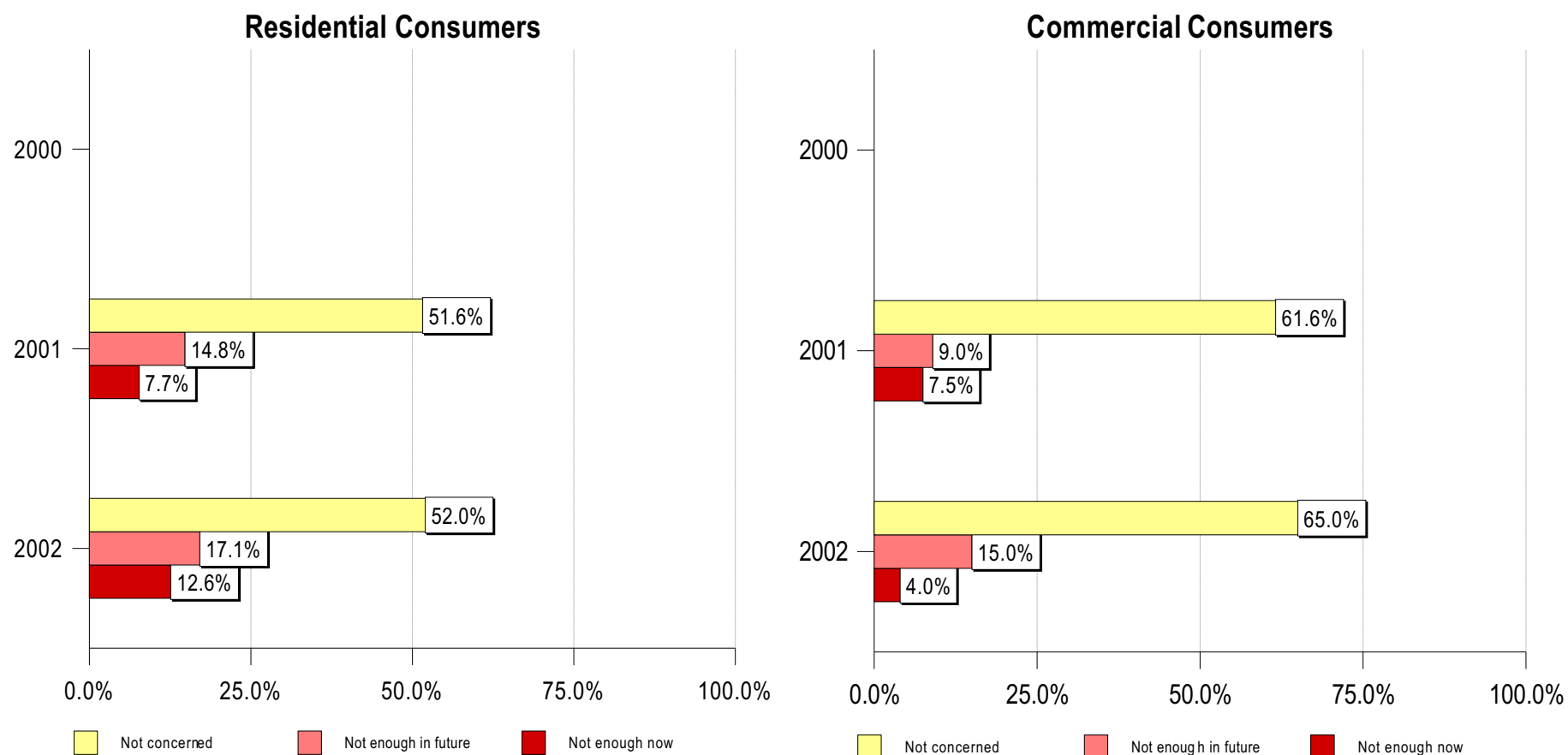


Source: RKM Research and Communications, Inc.

Chart 46 / MD PSC / 2002 Survey of Residential and Commercial Customers

View on the number of electric power suppliers?

[Among all respondents: compared over time]

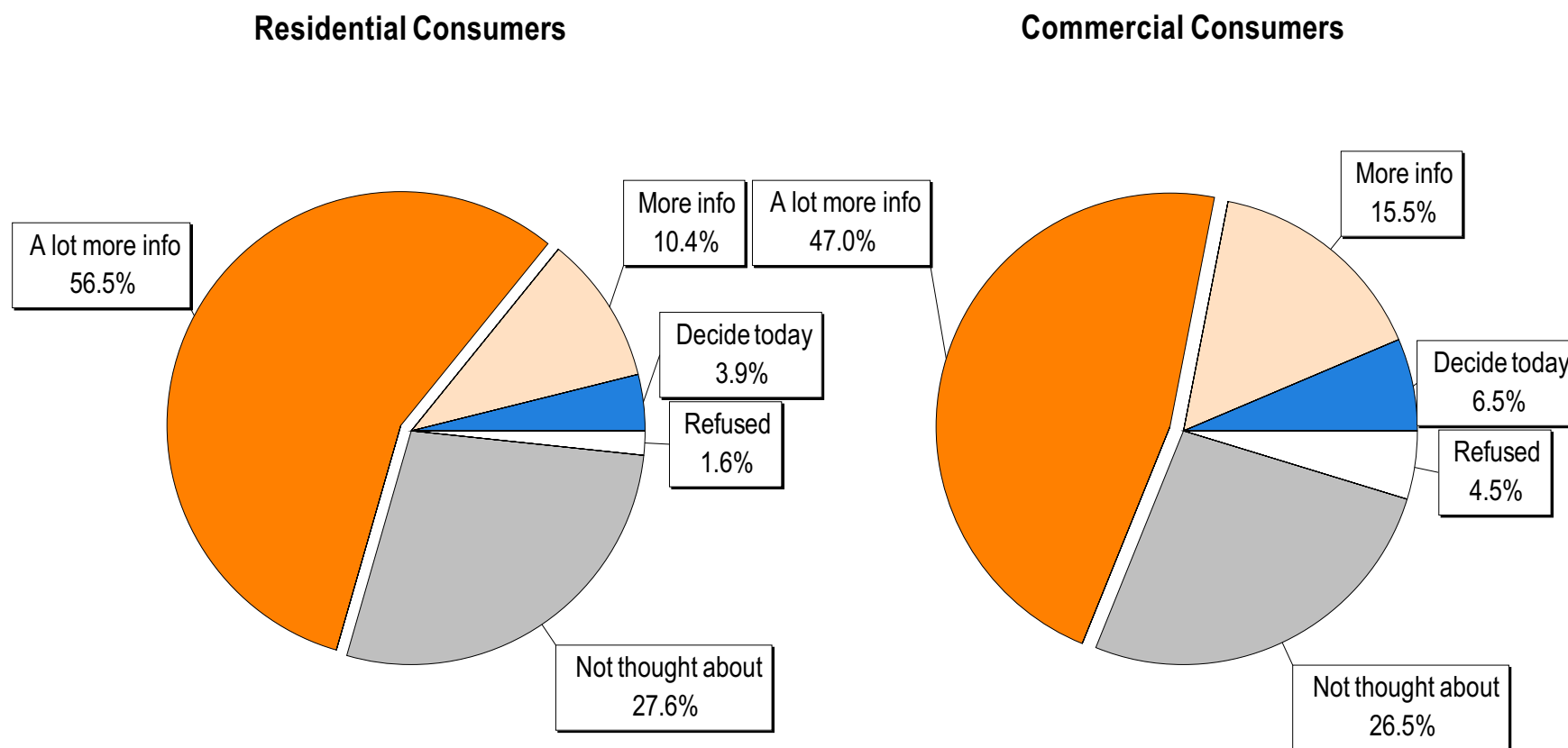


Source: RKM Research and Communications, Inc.

Chart 47 / MD PSC / 2002 Survey of Residential and Commercial Customers

How well prepared to make an informed decision on choice of power supplier?

[Among all respondents]

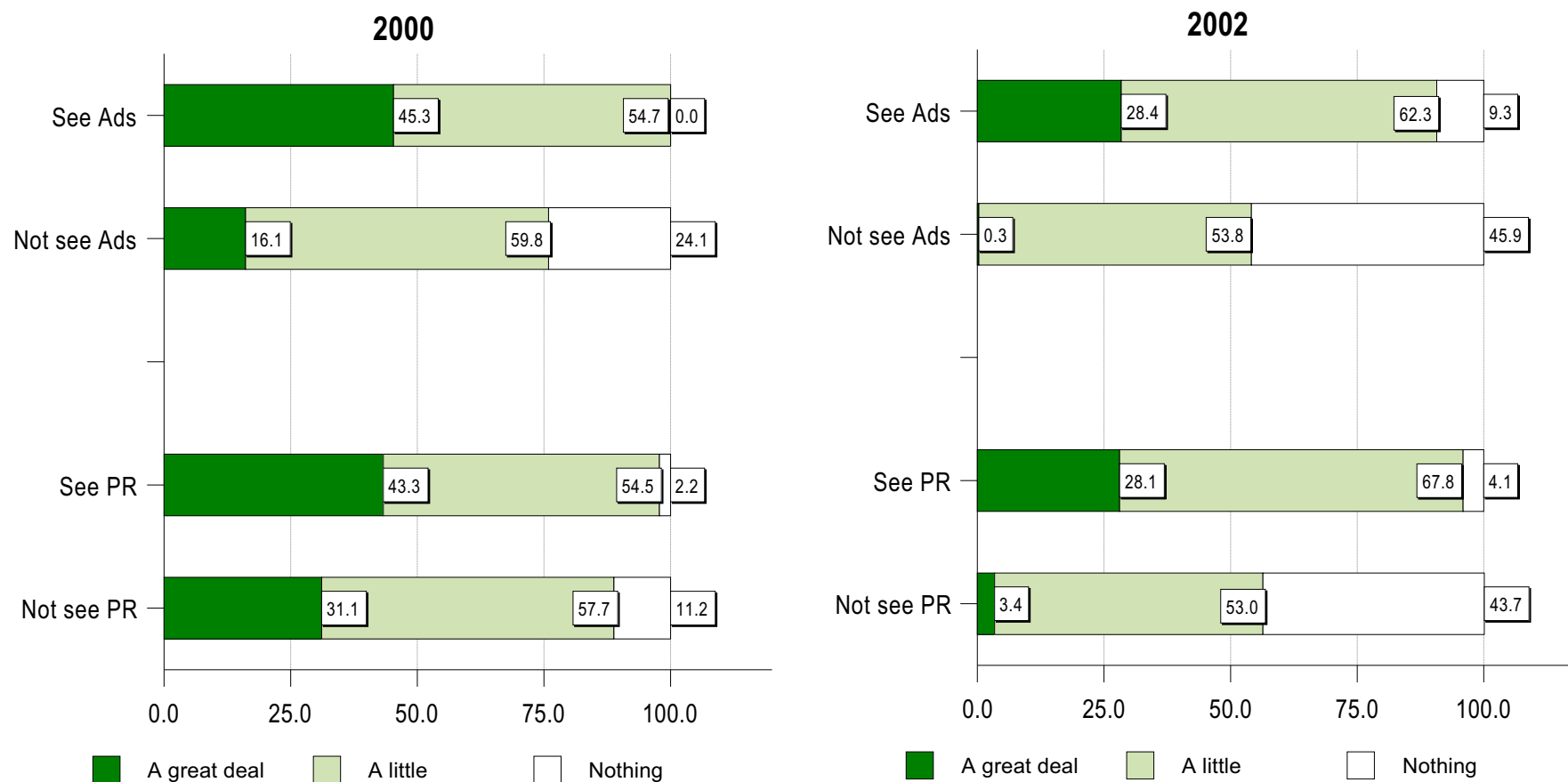


Source: RKM Research and Communications, Inc.

Chart 49 / MD PSC / 2002 Survey of Residential and Commercial Customers

Exposure to paid and earned media increases awareness of electric competition:

[Among residential customers only]

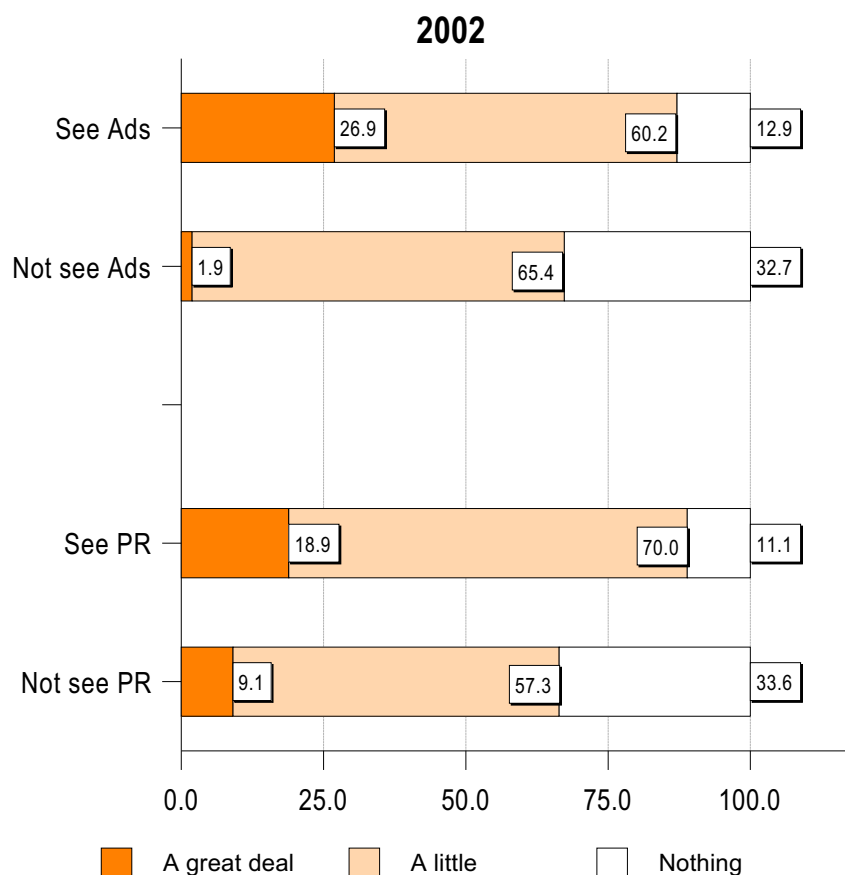
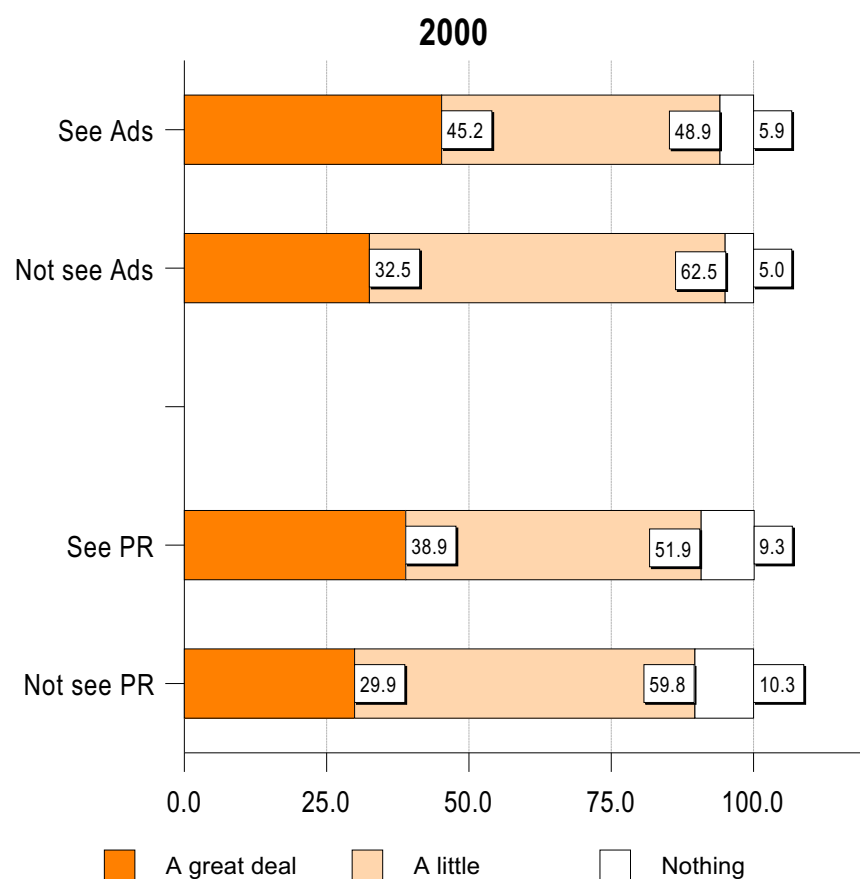


Source: RKM Research and Communications, Inc.

Chart 50 / MD PSC / 2002 Survey of Residential and Commercial Customers

Exposure to paid and earned media increases awareness of electric competition:

[Among commercial customers only]

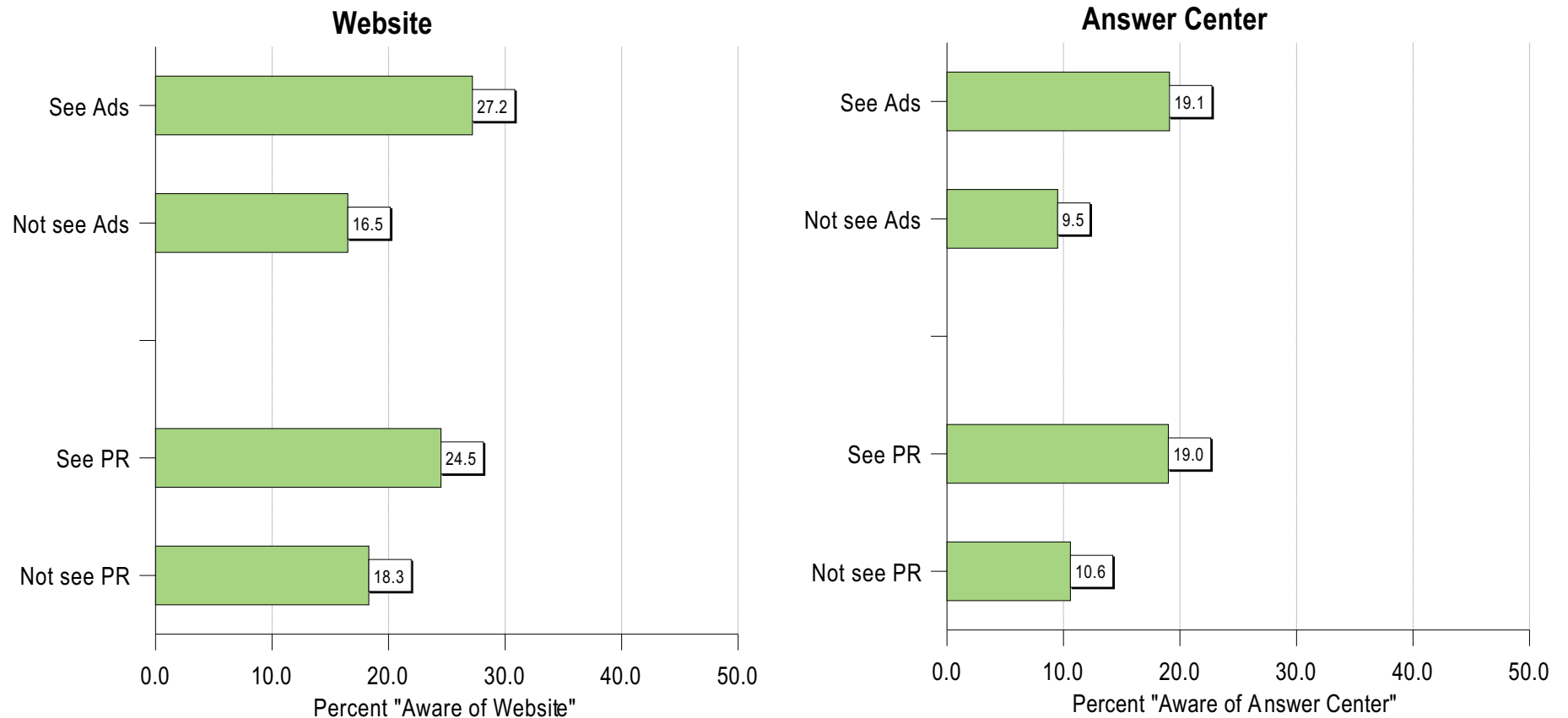


Source: RKM Research and Communications, Inc.

Chart 51 / MD PSC / 2002 Survey of Residential and Commercial Customers

Exposure to paid and earned media increases awareness of specific campaign tools:

[Among residential customers only | 2002 results only]

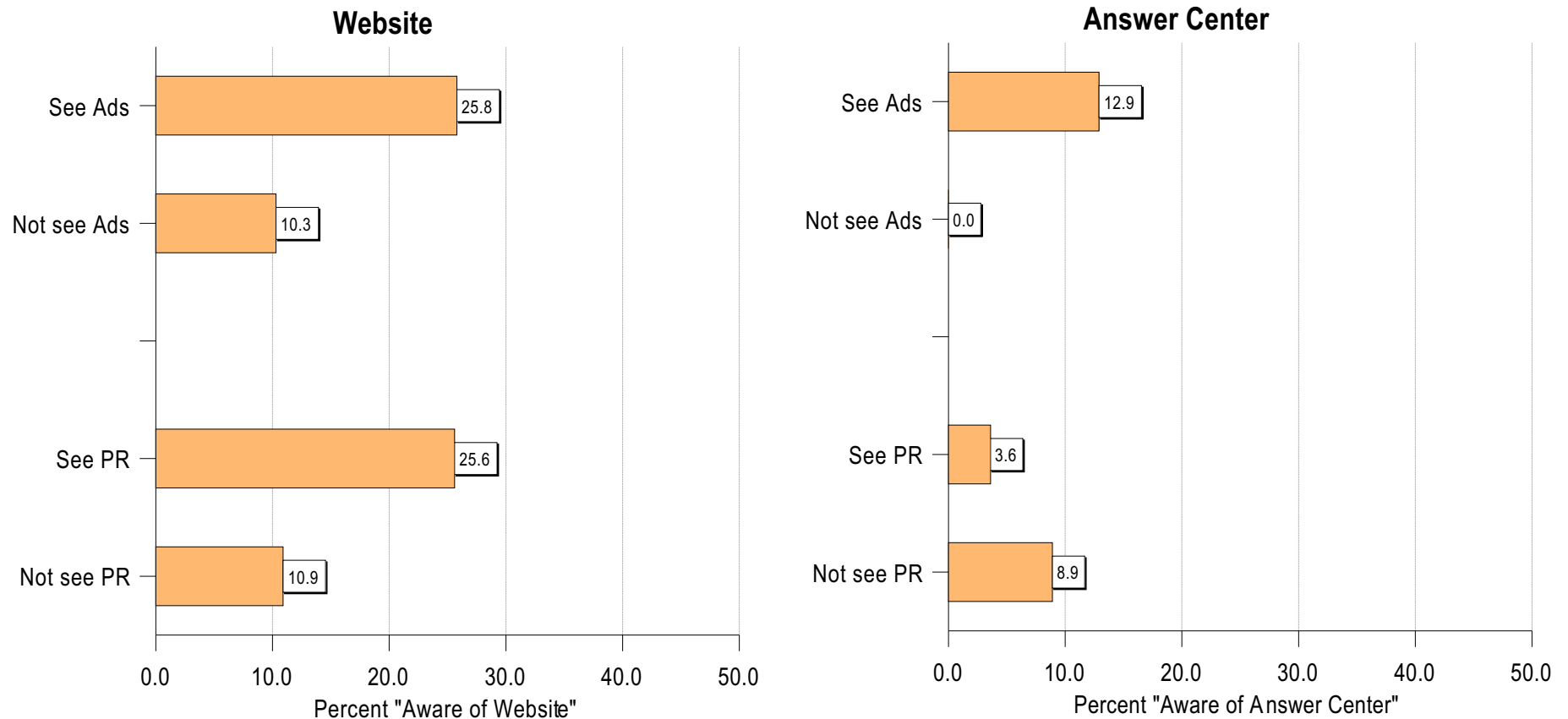


Source: RKM Research and Communications, Inc.

Chart 52 / MD PSC / 2002 Survey of Residential and Commercial Customers

Exposure to paid and earned media increases awareness of specific campaign tools:

[Among commercial customers only | 2002 results only]

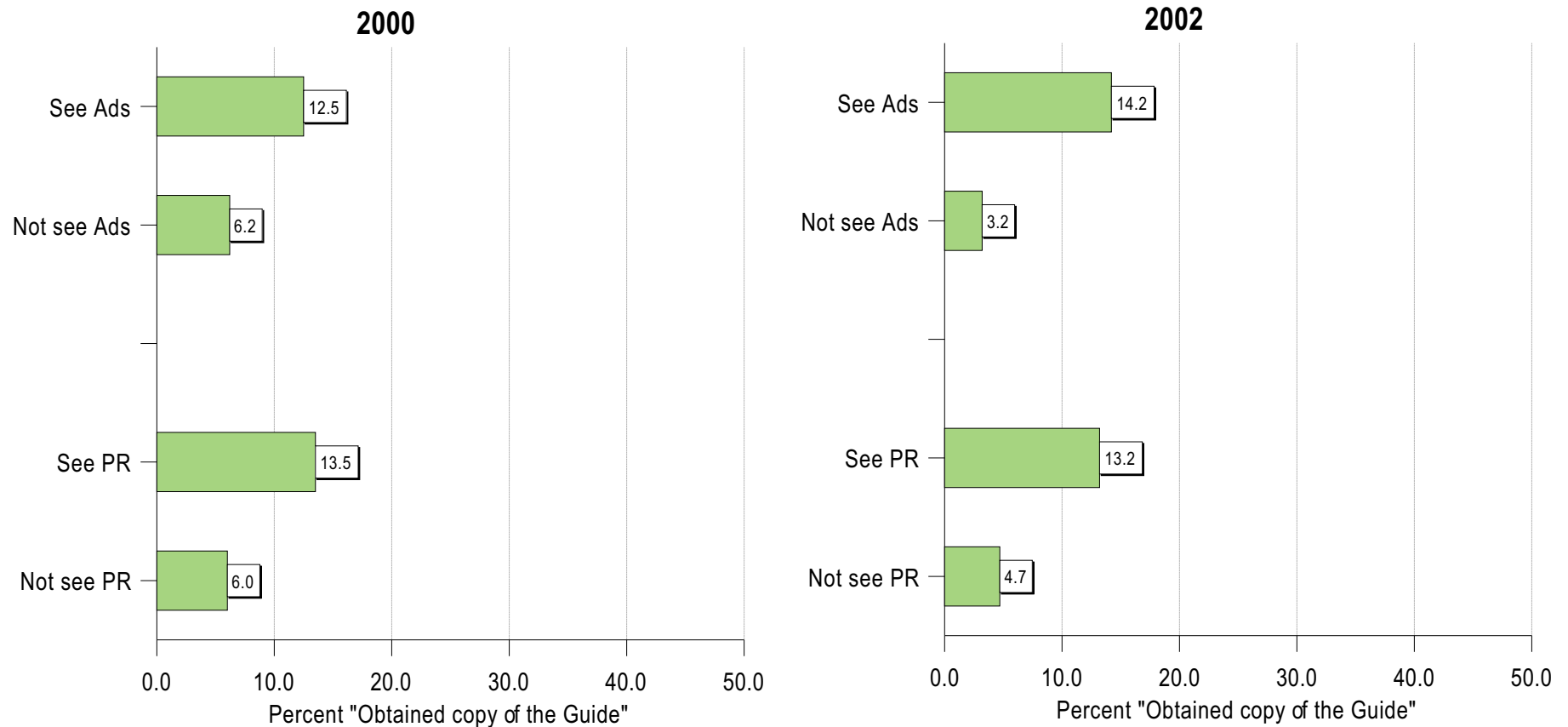


Source: RKM Research and Communications, Inc.

Chart 53 / MD PSC / 2002 Survey of Residential and Commercial Customers

Exposure to paid and earned media increases the likelihood that customers will obtain a copy of the guide:

[Among residential customers only]

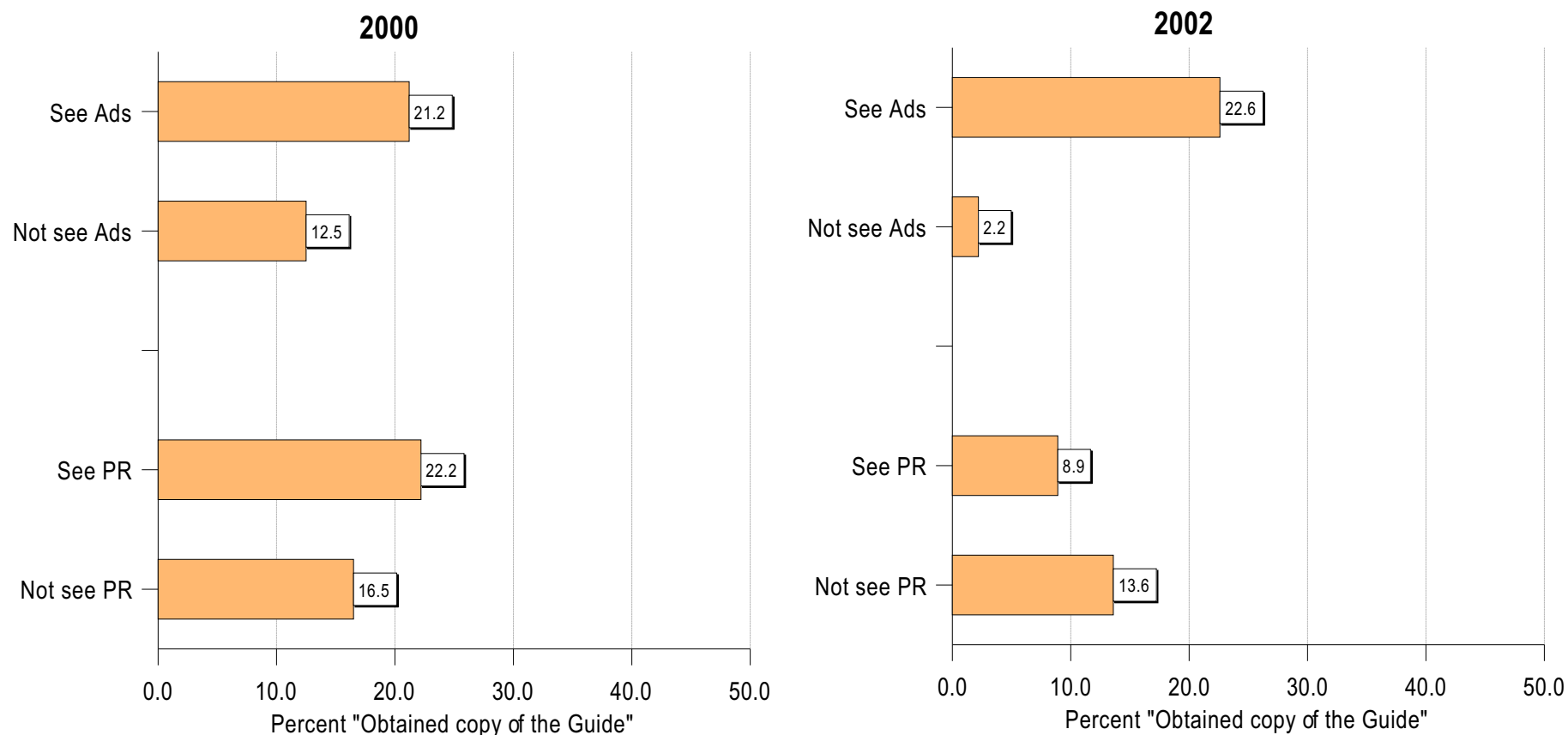


Source: RKM Research and Communications, Inc.

Chart 54 / MD PSC / 2002 Survey of Residential and Commercial Customers

Exposure to paid and earned media increases the likelihood that customers will obtain a copy of the guide:

[Among commercial customers only]

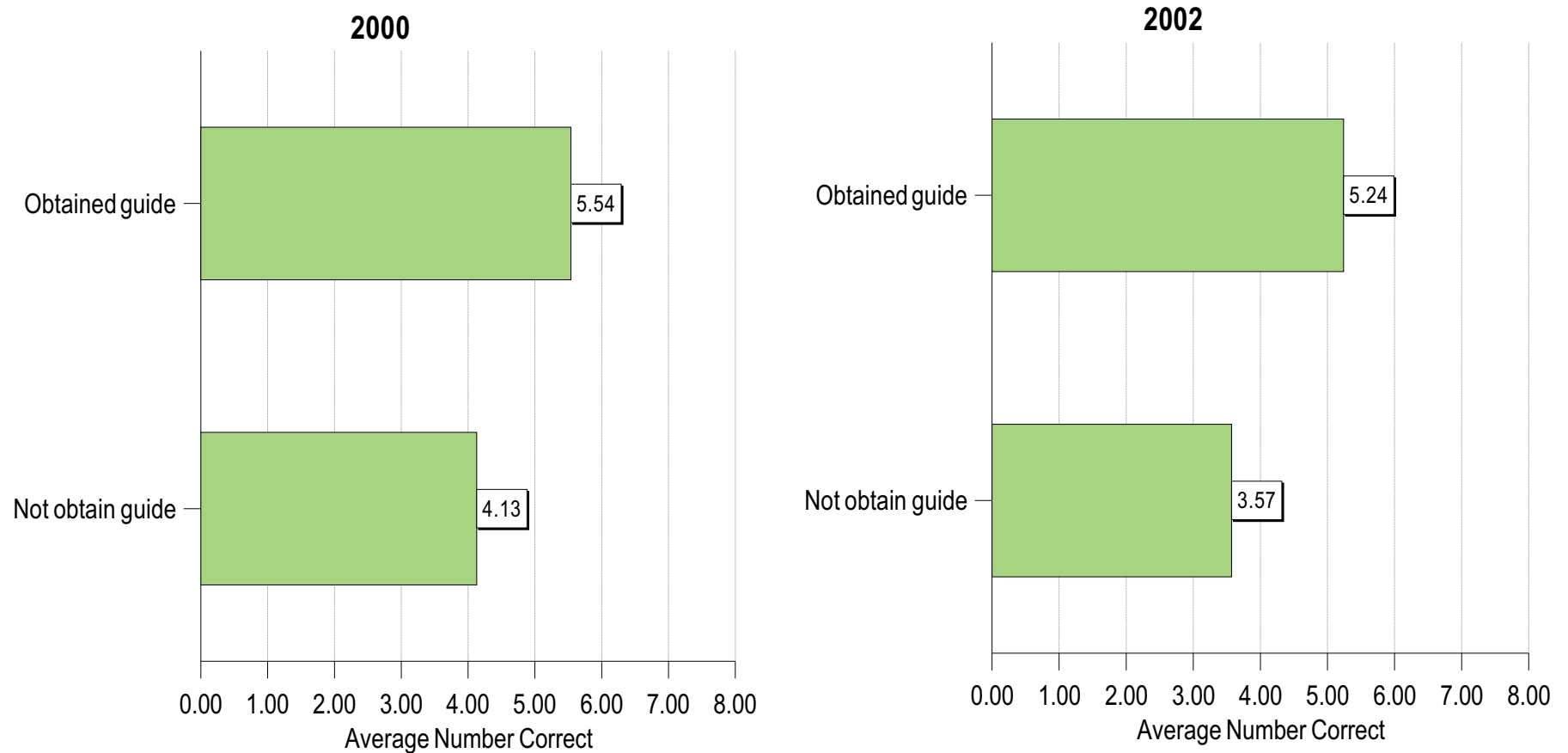


Source: RKM Research and Communications, Inc.

Chart 55 / MD PSC / 2002 Survey of Residential and Commercial Customers

Use of the consumer guide increases real knowledge regarding the details of electric competition:

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

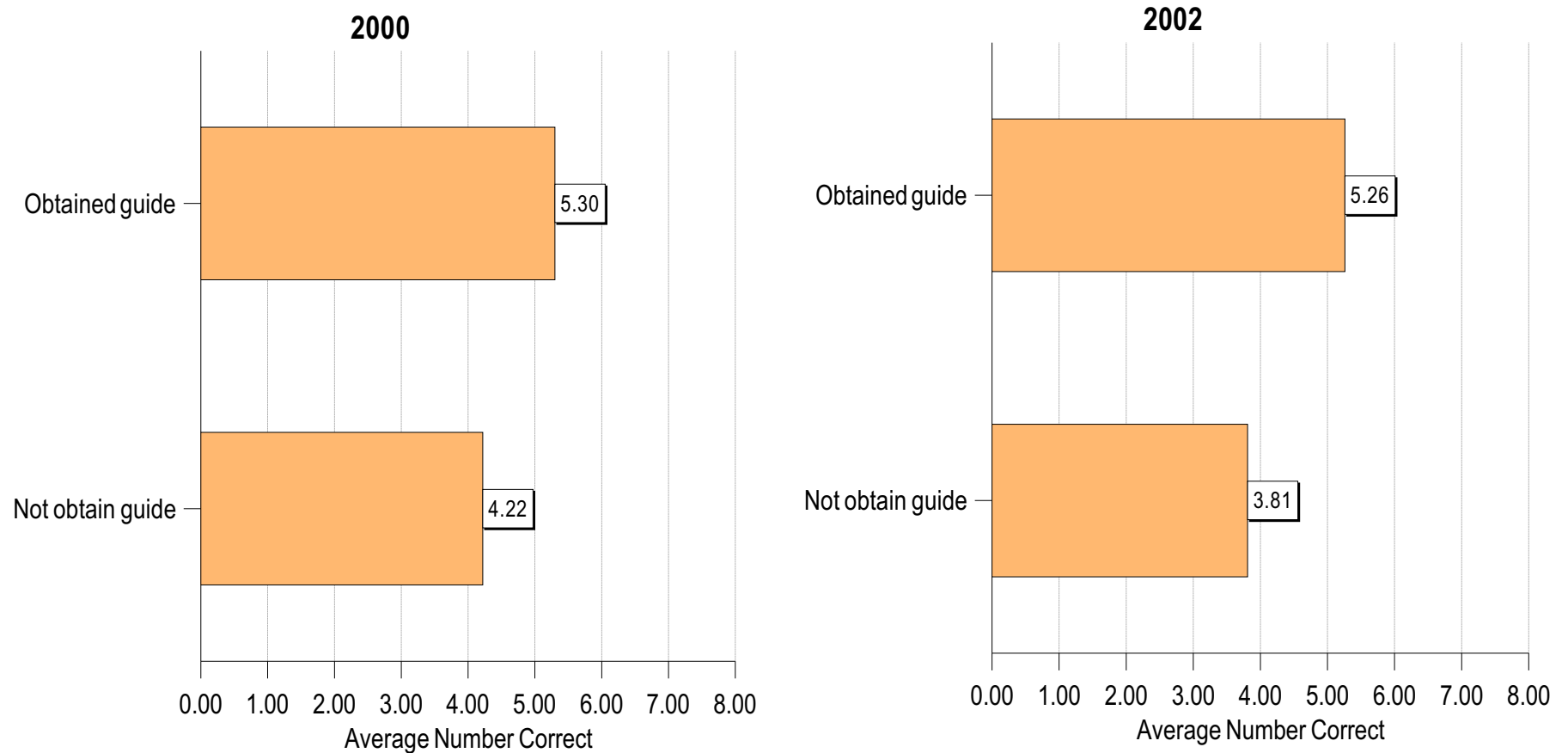


Source: RKM Research and Communications, Inc.

Chart 56 / MD PSC / 2002 Survey of Residential and Commercial Customers

Use of the consumer guide increases real knowledge regarding the details of electric competition:

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



Source: RKM Research and Communications, Inc.