

PG&E

Wildfire Safety-PSPS Awareness Survey General Population (Pre/Post)

July 6, 2021

Customer Experience & Insights (CXI)



Together, Building
a Better California



Methodology

- Number of completed surveys = 1,995 in 2021

Wave	February 2020	September 2020	November 2020	June 2021
Online	1,293	1,200	1,088	987
Phone	1,000	1,038	1,132	1,008

- Data collected: Feb 13 to Mar 1, Sep 10 to Sep 30, Nov 18 to Nov 30, May 20 to June 13
- Survey length: 11 minutes phone; 10 minutes online
- Minimum DMA quotas were set to ensure a statistically valid sample in each DMA
- Final sample was weighted by age and gender to provide representative views across the entire service territory, within each region, and by DMA
- The following is the distribution by DMA, along with the sampling variability at the 95% confidence interval:

Region	February 2020		September 2020		November 2020		June 2021	
	Total	Sampling Variability	Total	Sampling Variability	Total	Sampling Variability	Total	Sampling Variability
Bakersfield	253	+/-6.2%	250	+/-6.2%	237	+/-6.4%	190	+/-7.1%
Chico-Redding	303	+/-5.6%	281	+/-5.9%	266	+/-6.0%	249	+/-6.2%
Eureka	232	+/-6.4%	181	+/-7.3%	165	+/-7.6%	113	+/-9.2%
Fresno-Visalia	318	+/-5.5%	315	+/-5.5%	343	+/-5.3%	313	+/-5.5%
Monterey-Salinas	240	+/-6.3%	218	+/-6.6%	223	+/-6.6%	212	+/-6.7%
Sac-Modesto-Stockton	307	+/-5.6%	345	+/-5.3%	314	+/-5.5%	290	+/-5.8%
SB-Santa Maria-SLO	214	+/-6.7%	224	+/-6.6%	237	+/-6.4%	224	+/-6.6%
SF-Oakland-San Jose	426	+/-4.8%	424	+/-4.8%	435	+/-4.7%	404	+/-4.9%
Total	2,293	+/-2.0%	2,238	+/-2.1%	2,220	+/-2.1%	1,995	+/-2.2%





Methodology Details

	February 2020	September 2020 (Pre)	November 2020 (Post)	June 2021 (Baseline)
Approach	~50/50 mix of phone and online surveys			
Sample Frame	Stratified sample across DMAs; age/gender quotas in each	Stratified sample across DMAs; age/gender quotas in each	Stratified sample across DMAs; age/gender quotas in each	Stratified sample across DMAs; age/gender quotas in each
Weighting Scheme	Weighted by DMA (when looking at total sample), age, and gender	Weighted by DMA (when looking at total sample), age, and gender	Weighted by DMA (when looking at total sample), age, and gender	Weighted by DMA (when looking at total sample), age, and gender
Languages	English Spanish	English Spanish Chinese Korean Russian Tagalog Vietnamese	English Spanish Chinese Korean Russian Tagalog Vietnamese	English Spanish Chinese
Language Administration	The online survey used a dropdown that allowed respondents to take the survey in any language For the phone survey, fluent speakers were available in all languages for survey administration	The online survey used a dropdown that allowed respondents to take the survey in any language For the phone survey, fluent speakers were available in all languages for survey administration	The online survey used a dropdown that allowed respondents to take the survey in any language For the phone survey, fluent speakers were available in all languages for survey administration	The online survey used a dropdown that allowed respondents to take the survey in any language For the phone survey, fluent speakers were available in all languages for survey administration
Questionnaire	Based on questionnaire used for 2019 PG&E survey waves 1-2	Standardized questionnaire used by PG&E, SCE, and SDG&E	Standardized questionnaire used by PG&E, SCE, and SDG&E, with additional post-fire season questions	Standardized questionnaire used by PG&E, SCE, and SDG&E, with additional post-fire season questions
Data Collected	Feb 13, 2020 to Mar 1, 2020	Sep 10, 2020 to Sep 30, 2020	Nov 18, 2020 to Nov 30, 2020	May 20, 2021 to June 13, 2021



Methodology (AFN Assignment)

AFN (ACCESS & FUNCTIONAL NEEDS)

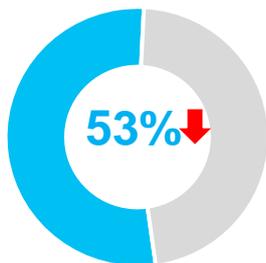
Variable	Specification	Source	Sample Size
Medical Baseline	Yes	From PG&E Sample List	127
Medical Needs in Home	Yes	D6: "Do you, or does anyone in your household, rely on electricity for medical needs or medical equipment?" (Yes/No)	350
Total Medical Needs (Net)			362
Language Preference	Not English	Q3: "What is your preferred language for receiving public safety information like this from PG&E?"	244
Survey Language (taken in)	Not English	From Survey	239
LanguagePref	Not English	From PG&E Sample List (Acxiom)	317
Stated_Lang_Pref	Not English	From PG&E Sample List (CC&B)	79
Total Non-English Speaker (Net)			372
Income Propensity 1-3	Yes	From PG&E Sample List	527
Income <\$30K	Under \$30K	From PG&E Sample List	224
CARE	Yes	From PG&E Sample List	575
Total Low-Income			896
Disabled	Yes	From PG&E Sample List	11
Vulnerable_Senior	Yes	From PG&E Sample List	1
Sight_Impair	Yes	From PG&E Sample List (includes Large Print and Braille)	0
Total Disabled/Vulnerable (Net)			12
TOTAL AFN (NET)			1,146
TOTAL RESPONDENTS			2,011
PERCENT AFN			57%



Key Findings

Communications

Aware of PG&E Communication



Sources of Communications (aided)

	May 2019	Aug 2019	Feb 2020	Sept 2020	Nov 2020	June 2021
	27% ↑	52% ↓	30% ↑	63% ↑	67% ↓	53%
	27% ↑	32% ↓	19% ↑	47% ↓	41% ↓	34%
	19% ↑	23% ↓	16% ↑	31%	32%	26%
	19% ↑	22% ↓	16% ↑	20%	17%	15%

- Just over half (53%) recalled communication from PG&E in June 2021
 - This is significantly lower than the 67% registered in November 2020, as well as the 63% in September 2020
- Awareness among Spanish speakers as well as English speakers decreased significantly between November and June
- Awareness of other communication sources decreased and is in-line with August 2019 results
 - Awareness of all other sources remain lower than PG&E

PG&E Communication Awareness by Language

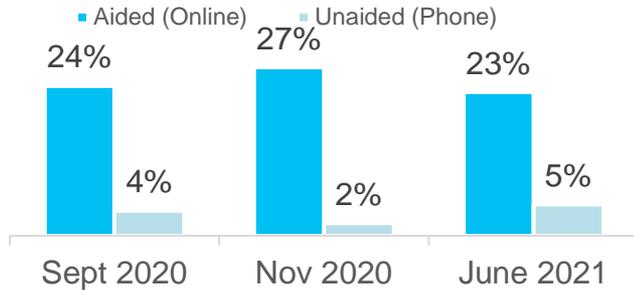
	Sept 2020	Nov 2020	June 2021
English	67%	↑ 72%	↓ 56%
Spanish	31%	36%	↓ 23%



Key Findings (cont.)

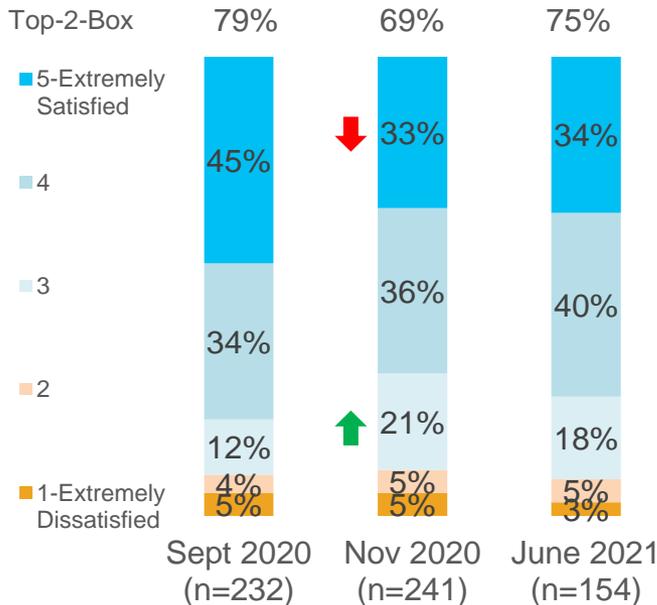
PG&E Website: General Information

Saw Information on PG&E Website



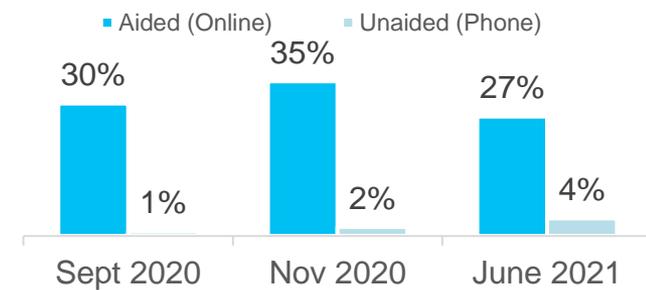
Satisfaction With PG&E Website

(saw information on PG&E website)



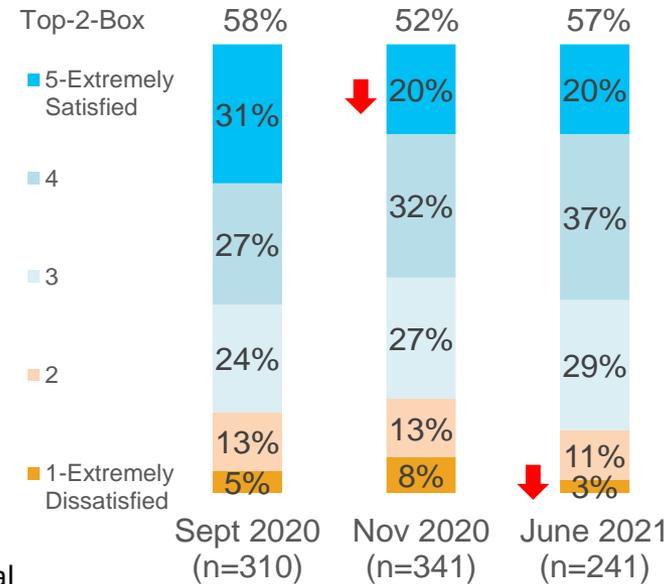
PG&E Website: PSPS Information

Heard about PSPS on PG&E Website

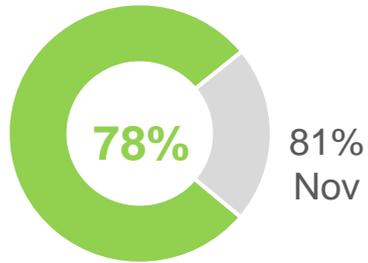


Satisfaction With PSPS Information on PG&E Website

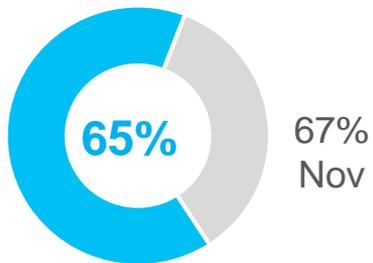
(saw PSPS Information on PG&E website)



Preparations and PSPS



Aware of PSPS



Prepared for PSPS

- PSPS awareness is 78% - in line with previous waves (81% in November and September 2020). Awareness remains significantly higher in Wildfire Tiers 2 and 3 (92% and 99%), vs. 76% in Tier 1.
 - TV and radio news reports remain the main sources of PSPS information, mentioned by two in five. Those in Wildfire Tiers 2 or 3 are most likely to mention their power being shut off, an email, a text message, a letter, and a telephone call from PG&E.
 - Communication from CalFire is rated as the most useful. Almost three in five of those who saw PSPS information on the PG&E website are satisfied with it.
- Two thirds say they are prepared for PPS (65%), in line with November (67%). Purchasing new lanterns or flashlights, non-refrigerated food, and water remain the most common steps taken to prepare for an PPS event.
 - Two in five say they prepared an emergency kit; significantly more Recallers and English-preferring customers did so, consistent with November and September findings.*

*Starting in September, emergency kit was not included as a separate question

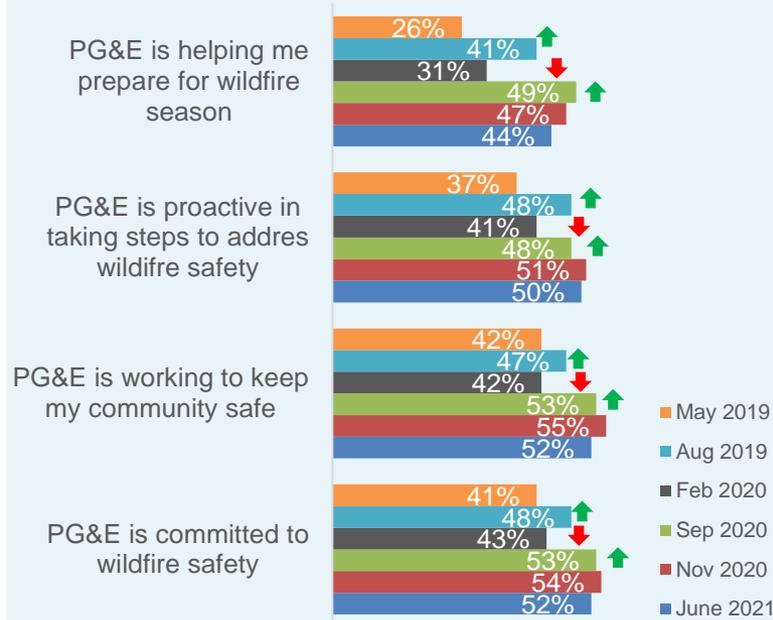


Key Findings (cont.)

Perceptions of PG&E (trending)

Agreement with all four statements about PG&E's efforts to address wildfire safety is in line with November findings.

Perceptions of PG&E Wildfire Safety Efforts



Significantly PG&E's wildfire safety efforts is in line with November.

Overall Satisfaction with PG&E's Wildfire Safety Efforts



Just under half rate PSPS program as positive, less than in November.

Perception of PSPS





Key Findings (cont.)

Perceptions of PG&E (Pre/Post)

Agreement with all statements about PG&E's efforts to address wildfire safety is in line with November findings.

Perceptions of PG&E Wildfire Safety Efforts



Agreement with statements about PG&E's efforts remains to be lower in Wildfire Tiers 2 and 3 (those most likely to be affected)

Those in Tier 2/3 have **lower levels** of agreement about the following statements:

- Is working to keep my community safe
- Is committed to wildfire safety
- Shows care and concern for customers
- Is a company I trust to act in the best interest of its customers
- Is committed to restoring power to customers affected by wildfires
- Is proactive in taking steps to address wildfire risks
- Is helping me prepare for wildfire season



Key Findings (cont.)

Customers in Wildfire Tiers 2-3 are more likely than those in Tier 1 to be aware of PG&E communications, more likely to be aware of PSPS, and more likely to be prepared for a PSPS event

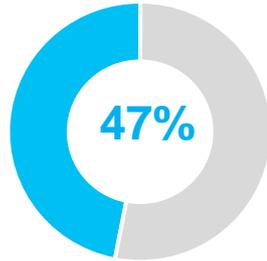
	Wildfire Tier			Medical Baseline		In Care		Low Income	
	Tier 1	Tier 2	Tier 3	Yes	No	Yes	No	Yes	No
Awareness of PG&E Communication	51%	60%	78%	65%	52%	42%	57%	43%	56%
Satisfaction with PG&E's efforts (top-2-box)	48%	45%	35%	51%	47%	63%	41%	56%	44%
Awareness of PSPS	76%	92%	99%	90%	78%	64%	84%	62%	84%
Preparedness for PSPS	63%	83%	89%	62%	65%	60%	67%	61%	67%
PSPS Perception (top-2-box)	46%	36%	38%	51%	44%	58%	40%	52%	42%

Bold text signifies statistical difference at the 95% confidence level compared to at least one other audience

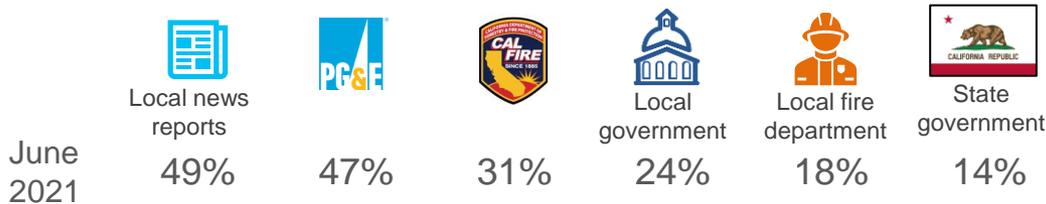


Key Findings (AFN)

Aware of PG&E Communication



Sources of Wildfire Communication Recall – Aided



Perception of PG&E Wildfire Safety Efforts

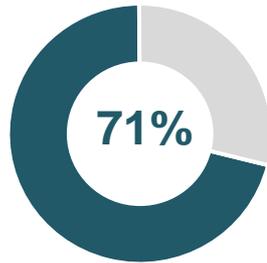


- Just under half of AFN customers (47%) recalled communication from PG&E in June 2021
 - Awareness is lower among those with Spanish as their preferred language
 - Recall is higher among those in Medical Baseline or with medical needs
- Local news reports is the most mentioned source of wildfire communication, followed by PG&E
 - Communications from PG&E and other sources are rated as useful
- Over half agree with all statements about PG&E's efforts to address wildfire safety

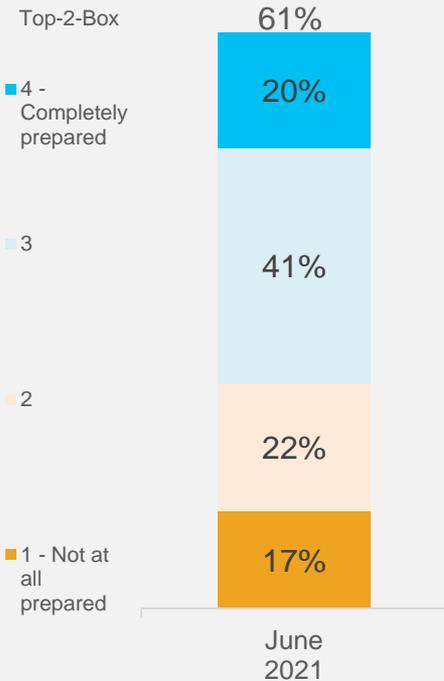


Key Findings (AFN)

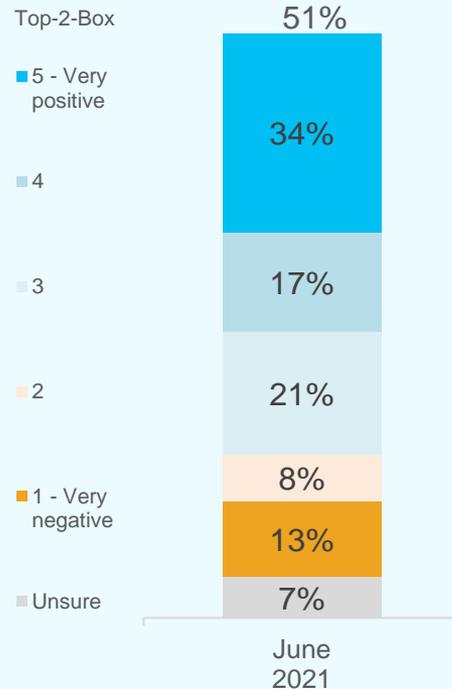
Aware of PSPS



Preparedness for PSPS



PSPS Perception



- Over seven in ten of AFN customers are aware of PSPS
 - Awareness is higher among those preferring other languages, not classified as low income propensity, not in Care, in Medical Baseline, or with medical needs
 - TV or radio news reports are the main sources of PSPS communication
- Three in five AFN customers say they are prepared for a PSPS event
 - Aided, one in three say they have prepared an emergency kit
- Overall PSPS perception among AFN customers is positive, with over half giving top scores
 - Those in Care as well as those without medical needs at home are more likely to have a positive perception