

PG&E

Wildfire Safety-PSPS Awareness Survey General Population (Pre-Season)

Presented to PMO

November 15, 2022

Customer Experience & Insights (CXI)



Together, Building
a Better California



Methodology

- Number of completed surveys = 2,752 in September 2022

Wave	February 2020	September 2020	November 2020	August 2021	December 2021	September 2022
Online	1,293	1,200	1,088	1,138	1,341	1,361
Phone	1,000	1,038	1,132	1,002	1,354	1,390

- Data collected: Aug 30 to Sep 25
- Survey length: 20 minutes phone; 19 minutes online
- Standardized questionnaire used by PG&E, SCE, and SDG&E (developed in 2020)
- Minimum DMA quotas were set to ensure a statistically valid sample in each DMA
- Stratified sample across DMAs with AFN oversample; age/gender quotas in each.
- Final sample was weighted by age and gender to provide representative views across the entire service territory, within each region, and by DMA
- 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 following languages were available:

English	Korean
Spanish	Farsi
Arabic	Persian
Armenian	Portuguese
Chinese	Punjabi
Filipino	Russian
Hmong	Tagalog
Hindi	Thai
Japanese	Vietnamese
Khmer	



Other than Spanish speakers, very few chose to take the survey in another language despite being offered in multiple languages

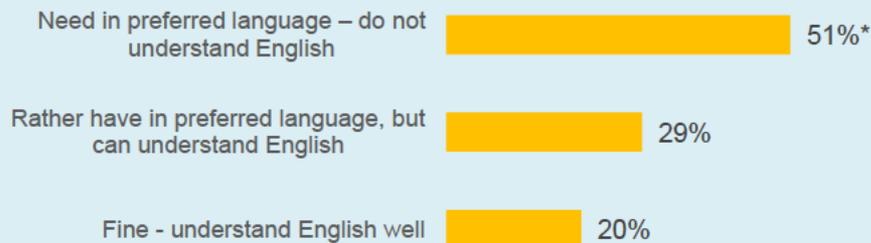
Few customers took the survey in a language other than English or Spanish

	Sep 2020		Nov 2020		Aug 2021		Dec 2021		Sep 2022	
English	2,030	91%	1,947	88%	1,870	87%	2,471	92%	2,492	91%
Spanish	191	9%	262	12%	119	6%	94	3%	118	4%
Chinese	14	1%	10	1%	84	4%	36	1%	56	2%
Vietnamese	0	0%	0	0%	39	2%	40	1%	41	1%
Korean	1	<1%	0	0%	16	1%	27	1%	23	1%
Arabic	0	0%	0	0%	1	<1%	0	0%	14	1%
Japanese	0	0%	0	0%	6	<1%	24	1%	6	<1%
Russian	2	<1%	1	<1%	3	<1%	3	<1%	0	0%
Punjabi	0	0%	0	0%	1	<1%	0	0%	0	0%
Farsi	0	0%	0	0%	0	0%	0	0%	0	0%
Hmong	0	0%	0	0%	0	0%	0	0%	0	0%
Hindi	0	0%	0	0%	0	0%	0	0%	0	0%
Khmer	0	0%	0	0%	0	0%	0	0%	0	0%
Portuguese	0	0%	0	0%	0	0%	0	0%	0	0%
Tagalog	0	0%	0	0%	0	0%	0	0%	0	0%
Thai	0	0%	0	0%	0	0%	0	0%	0	0%

Top Preferred Languages



English-only Communication Perception (n=117; Preferred language is Spanish)



*51% of Spanish-speaking customers who need communications in their preferred language translates to 2% of customers overall

Q3. What is your preferred language for receiving public safety information like this from PG&E? Base: Total (n=2,751)

Q4. How do you feel about receiving wildfire communications from PG&E in English only? Base: English is not preferred language (n=177)



Messaging and Message Recall

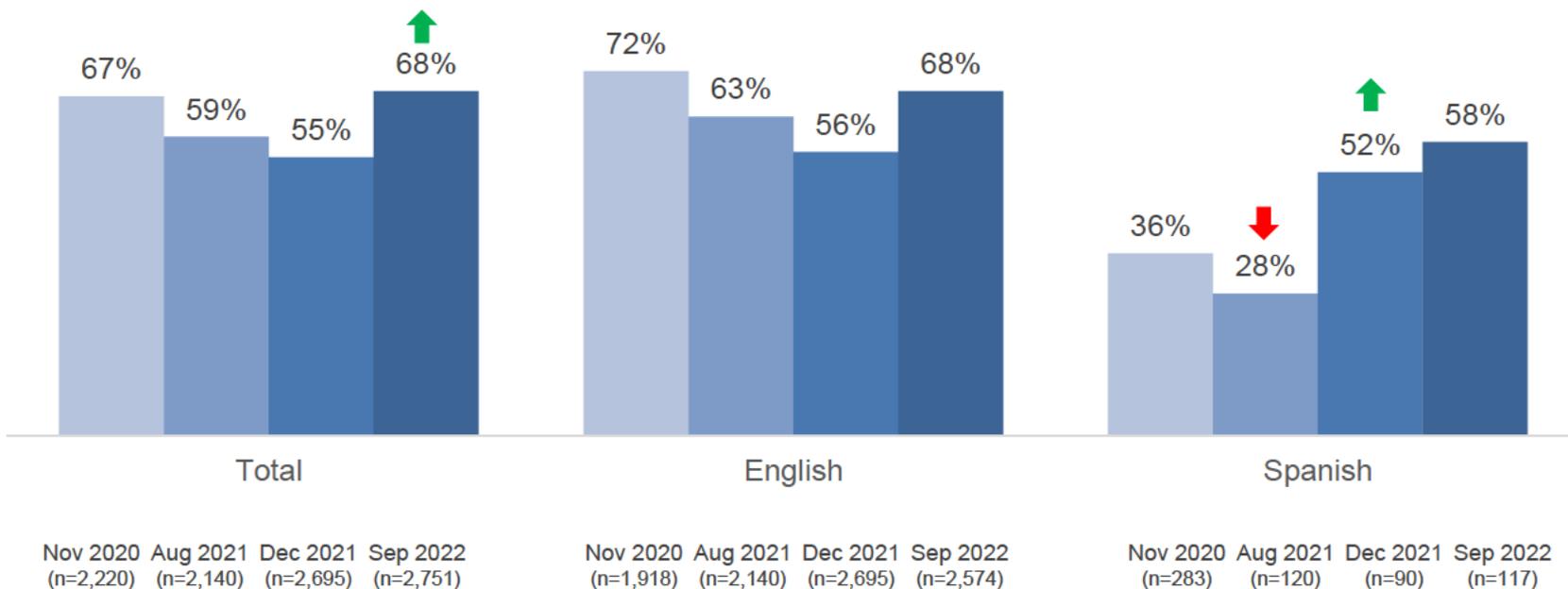


Over two thirds recall communication from PG&E, up from December 2021

Recall is higher among those age 55+, those earning \$100k or more, those with some college or higher, and those in wildfire tiers 2/3

Recall is highest in the Eureka (75%), Santa Barbara/SLO (73%), and Chico-Redding (72%) DMAs

% Recall Comms About Wildfire From PG&E



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

Arrows signify statistical difference at the 95% confidence level compared to the previous wave

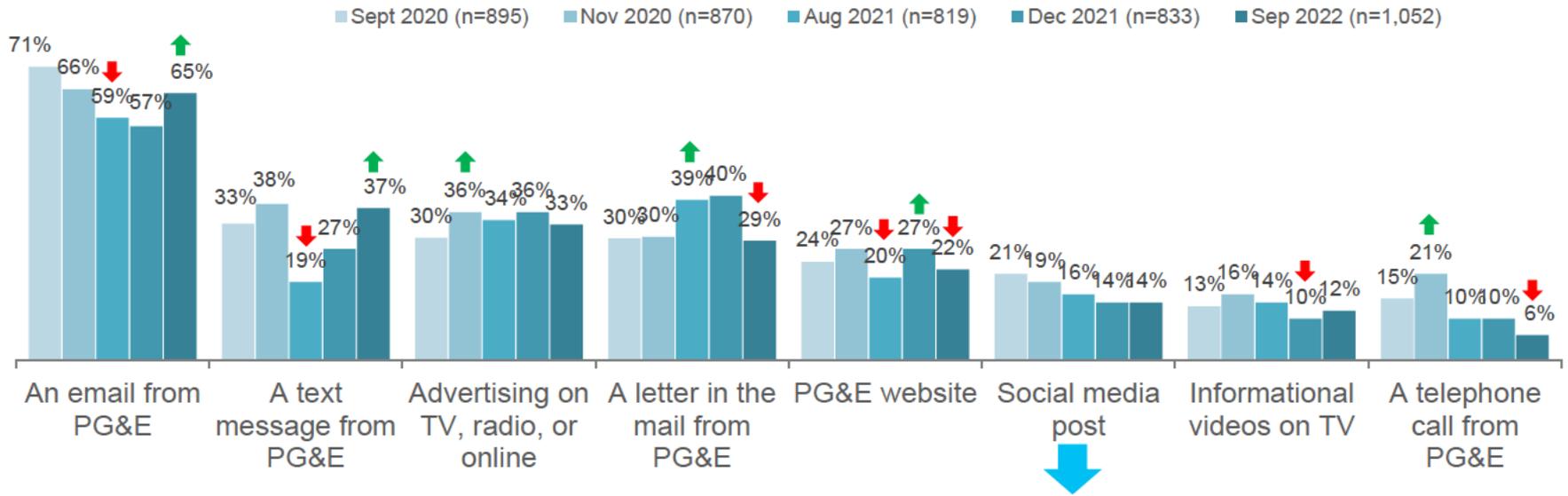
Q1. In the past few months do you recall any communications of any type (i.e. mail, TV, radio, social media, etc.) from PG&E about the threat of wildfires and how you can prepare for them? Base: Total (n=2,751)



Aided, nearly two thirds recalled email communications from PG&E, higher than Dec 2021

Facebook remains the most commonly mentioned social media platform

Top Sources of Communication from PG&E (aided – online)



Social Media Platforms*					
	September 2020 (n=189)	November 2020 (n=158)	August 2021 (n=133)	December 2021 (n=140)	September 2022 (n=182)
Facebook	60%	66%	68%	64%	68%
Nextdoor	47%	41%	34%	26%	26%
Instagram	7%	10%	5%	8%	19%
Twitter	22%	13%	6%	17%	13%
YouTube	10%	6%	10%	9%	10%
Tik Tok	---	---	---	---	2%

Q6. Where did you see or hear PG&E's communications about wildfire season safety and preparedness in English? Base: Web English Recalls (n=1,052)

Arrows signify statistical difference at the 95% confidence level compared to the previous wave

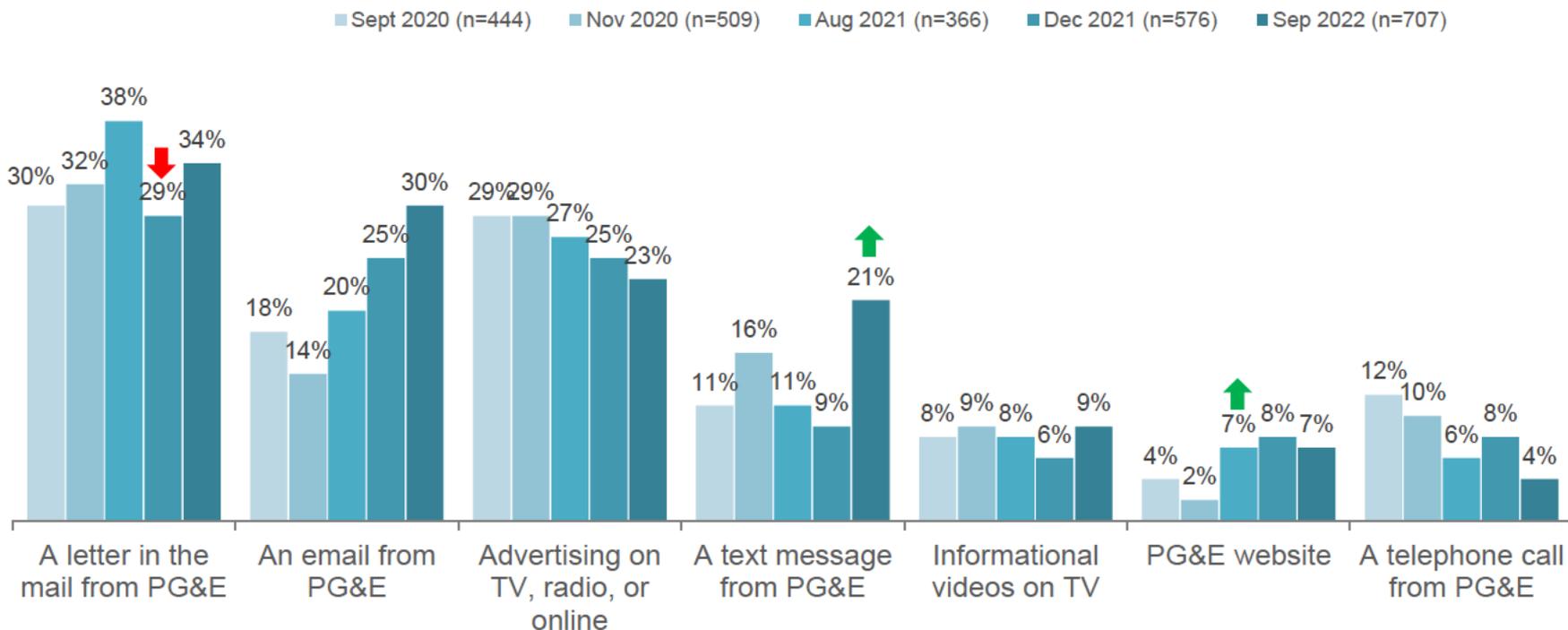
Q6A. On which Social Media platforms do you recall hearing or seeing information about wildfire season safety and preparedness in English? Base: Web English Recalls; Saw communication on social media (n=182)



Unaided, one third recall a letter in the mail from PG&E and three in ten recall an email from PG&E

A significantly higher percentage recall a text message from PG&E when compared with December 2021

Top Sources of Communication from PG&E (unaided – phone)



*Insufficient sample size to report on Spanish speakers

Arrows signify statistical difference at the 95% confidence level compared to the previous wave



All communication sources were rated as useful; telephone calls and PG&E website most useful

Usefulness of all communication sources are consistent with December 2021

Communication Usefulness

(English Recallers)

Top-2-Box

		Sept 2020	Nov 2020	Aug 2021	Dec 2021	Sep 2022
A telephone call from PG&E (n=97)		66%	60%	56%	75% ↑	71%
PG&E website (n=274)		72%	67%	70%	63%	71%
Informational videos on TV (n=187)		69%	62%	58%	60%	70%
A text message from PG&E (n=544)		74%	76%	65%	65%	68%
Social media post (n=182)		61%	57%	52%	49%	57%
An email from PG&E (n=893)		67%	60%	56%	56%	55%
A letter in the mail from PG&E (n=543)		65%	58%	53%	56%	55%
Advertising on TV, radio, or online (n=510)		62%	57%	53%	61%	54%

■ 1 - Not at all useful ■ 2 ■ 3 ■ 4 ■ 5 - Extremely useful

↓ ↑ Arrows signify statistical difference at the 95% confidence level compared to the previous wave

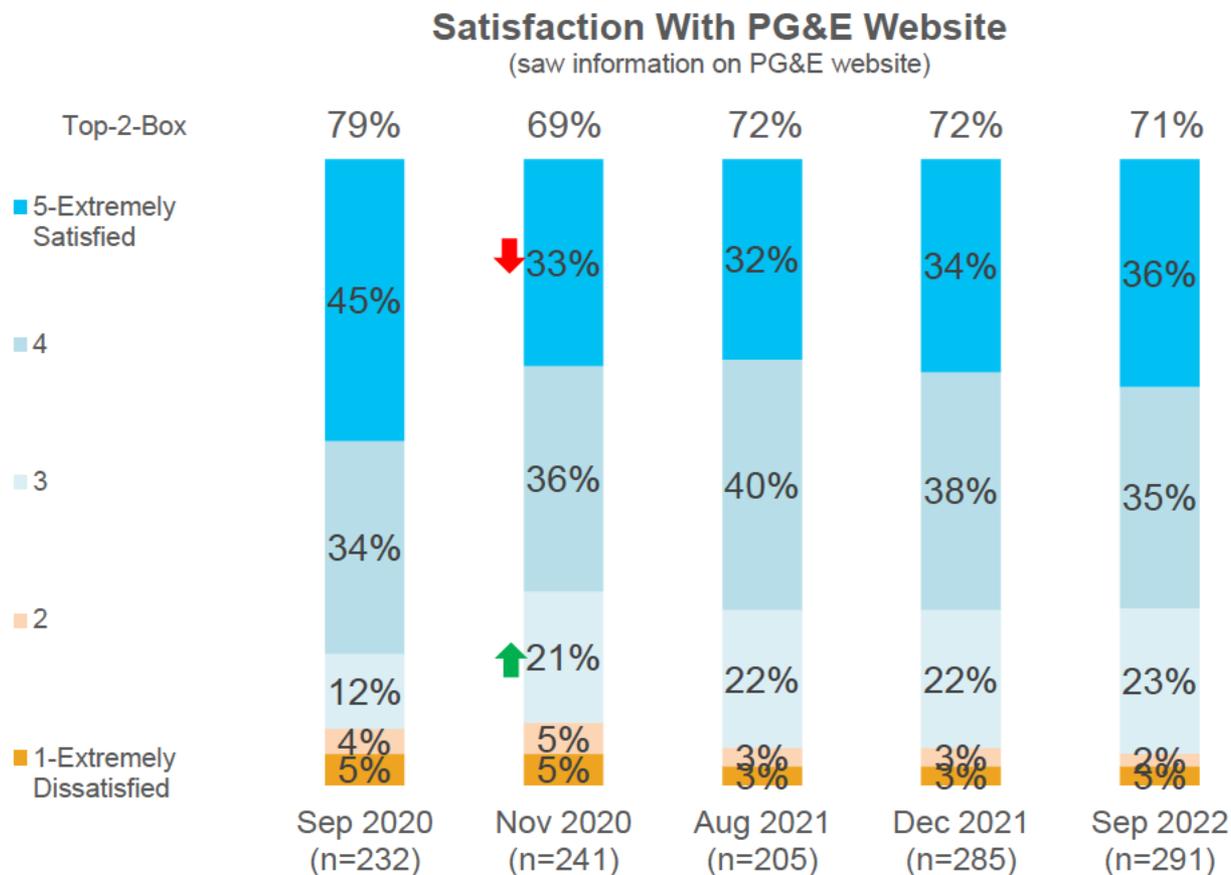
Q9A. How useful were the wildfire communications that you saw or heard from PG&E via...? Base: English Recallers (n varies)

Internal



Customers remain satisfied with information about wildfire preparedness on the PG&E website

Seven in ten are satisfied with the information found on the website, consistent with December and August 2021 findings



Arrows signify statistical difference at the 95% confidence level compared to the previous wave

Q8. How satisfied were you with the information provided on the PG&E website about preparing for wildfires? Base: Recallers, saw information on PG&E website (n=291)

Internal



PG&E remains the primary source of wildfire communications

Aided recall of communications from PG&E is up from December 2021; recall unchanged for other major sources

Sources of Wildfire Communication Recall – Aided (2019-2022 Trended)



Local government



State government

	Aided Recall	Aided Recall	Aided Recall	Aided Recall
Sep 2022	↑ 68%	39%	26%	15%
Dec 2021	↓ 55%	42%	29%	16%
Aug 2021	59%	40%	30%	17%
Nov 2020	↑ 67%	↓ 41%	32%	17%
Sept 2020	↑ 63%	↑ 47%	↑ 31%	↑ 20%
Feb 2020	↓ 30%	↓ 19%	↓ 16%	↓ 16%
Aug 2019	↑ 52%	↑ 32%	↑ 23%	↑ 22%
May 2019	27%	27%	19%	19%

PG&E asked aided for all waves
Others asked unaided/aided prior to Sep 2020

↓ ↑ Arrows signify statistical difference at the 95% confidence level compared to the previous wave

Q1. In the past few months do you recall any communications of any type (i.e., mail, TV, radio, social media, etc.) from PG&E about the threat of wildfires and how you can prepare for them? Base: Total (n=2,751)

Q10. Other than PG&E's communications, what other sources have you used to obtain information about wildfire safety and preparedness in English? Base: Total (n=1,341) 10

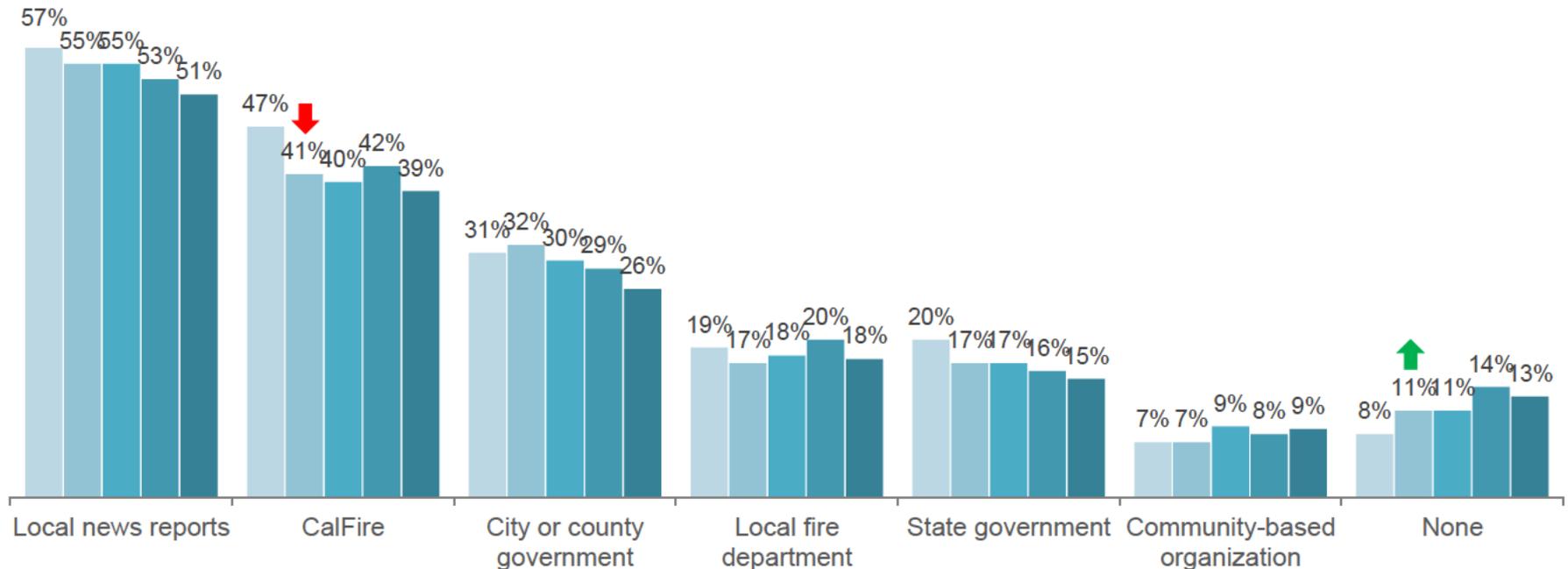


Other than PG&E, local news reports and CalFire are the leading sources of wildfire information

Recall of specific sources was consistent between September 2022 and December 2021

Top Wildfire Information Sources Other Than PG&E (aided – online)

■ Sept 2020 (n=1,113) ■ Nov 2020 (n=1,037) ■ Aug 2021 (n=1,080) ■ Dec 2021 (n=1,245) ■ Sep 2022 (n=1,341)



↓ ↑ Arrows signify statistical difference at the 95% confidence level compared to the previous wave

*Insufficient sample size to report on Spanish speakers

Q10. Other than PG&E's communications, what other sources have you used to obtain information about wildfire safety and preparedness in English? Base: Web English (n=1,341)

Internal



Satisfaction with PG&E's Wildfire Safety Awareness Efforts



Customers are most likely to agree that PG&E is committed to restoring power to customers affected by wildfires

Compared to December 2021, agreement that PG&E makes an effort to communicate with customers about wildfires and is helping me prepare for wildfire season has increased significantly

Perception of PG&E (n=2,751)

Top-2-Box (4-5)

Sept 2020 Nov 2020 Aug 2021 Dec 2021 Sep 2022

Statement	9%	8%	7%	18%	26%	33%	Sept 2020	Nov 2020	Aug 2021	Dec 2021	Sep 2022
Is committed to restoring power to customers affected by wildfires	9%	8%	7%	18%	26%	33%	60%	60%	56%	↑ 61%	59%
Makes an effort to communicate with all customers about wildfires	7%	7%	8%	21%	26%	32%	65%	62%	↓ 53%	53%	↑ 58%
Is committed to wildfire safety	6%	12%	11%	21%	23%	28%	53%	54%	↓ 46%	↑ 50%	51%
Is working to keep my community safe	6%	11%	11%	21%	23%	27%	53%	55%	↓ 47%	49%	50%
Shows care and concern for customers	4%	15%	13%	22%	22%	24%	49%	51%	↓ 43%	↑ 46%	46%
Is proactive in taking steps to address wildfire risks	8%	13%	12%	21%	22%	24%	48%	51%	↓ 41%	↑ 45%	46%
Takes proactive measures to protect the electricity grid from wildfires	9%	14%	12%	21%	20%	24%	46%	49%	↓ 41%	42%	44%
Is helping me prepare for wildfire season	7%	14%	13%	23%	22%	22%	49%	47%	↓ 39%	39%	↑ 44%
Is a company I trust to act in the best interest of its customers	4%	21%	17%	21%	16%	22%	39%	43%	↓ 38%	38%	38%

■ Unsure ■ 1 - Completely disagree ■ 2 ■ 3 ■ 4 ■ 5 - Completely agree

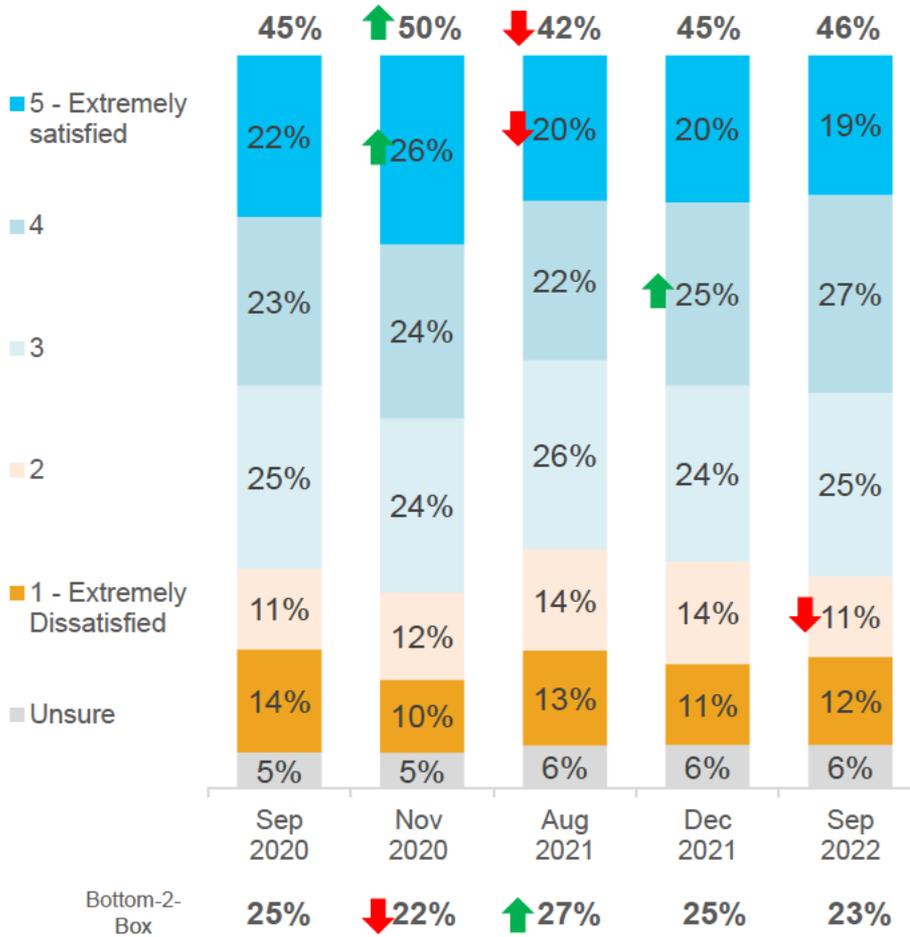
↓ ↑ Arrows signify statistical difference at the 95% confidence level compared to the previous waves



Satisfaction is consistent with December 2021

Satisfaction with PG&E Wildfire Efforts

(n=2,751)



Spanish speakers remain more satisfied than English speakers with PG&E's efforts (90% vs 43%)

% Satisfied with Wildfire Efforts by Language

	Sept 2020	Nov 2020	Aug 2021	Dec 2021	Sep 2022
English	43%	44%	38%	42%	43%
Spanish	70%	91%	80%	92%	90%

Satisfaction remains significantly higher among those in tier 1 compared with those in tiers 2/3

Wildfire Tiers	Top-2-Box				
	Sept 2020	Nov 2020	Aug 2021	Dec 2021	Sep 2022
Tier 1 (Sep n= 1885, Nov n=1899, Aug n=1798, Dec n=2315, Sep n=2433)	46%	52%	43%	47%	47%
Tier 2-3 (Sep n=353, Nov n=321, Aug n=342, Dec n=380, Sep 318)	37%	41%	35%	36%	38%

Arrows signify statistical difference at the 95% confidence level compared to the previous wave



Improving notice accuracy and phone or text alerts are the top suggestions

- Phone or text alerts (11%) and better communication (11%) are mentioned the most by Spanish speakers

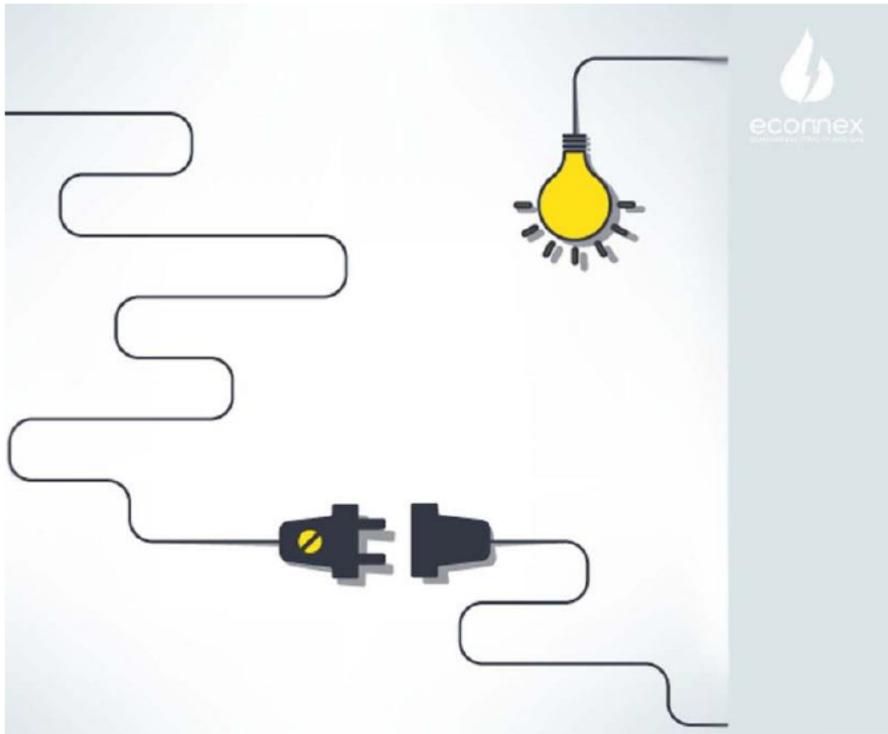
Suggestions For Improvement (n=1,873; English Recalls)

	 Good job/ Nothing	 Phone/ Text alerts	 Improve accuracy	 Internet, social media, email	 Frequent notifications	 Better communication	 Fix infrastructure
Sep 2022	32%	8%	8%	7%	6%	6%	6%
Dec 2021	32% 	8%	6%	6%	8% 	7%	6%
Aug 2021	28%	7%	7% 	7%	5%	6%	6%
Nov 2020	36% 	7%	10% 	5%	5% 	8%	7%
Sept 2020	32%	9%	6%	6%	9%	7%	--

  Arrows signify statistical difference at the 95% confidence level compared to the previous wave

Q13. In what ways could PG&E improve their communications about wildfire preparedness? Base: Recalls (n=1,873)

Internal

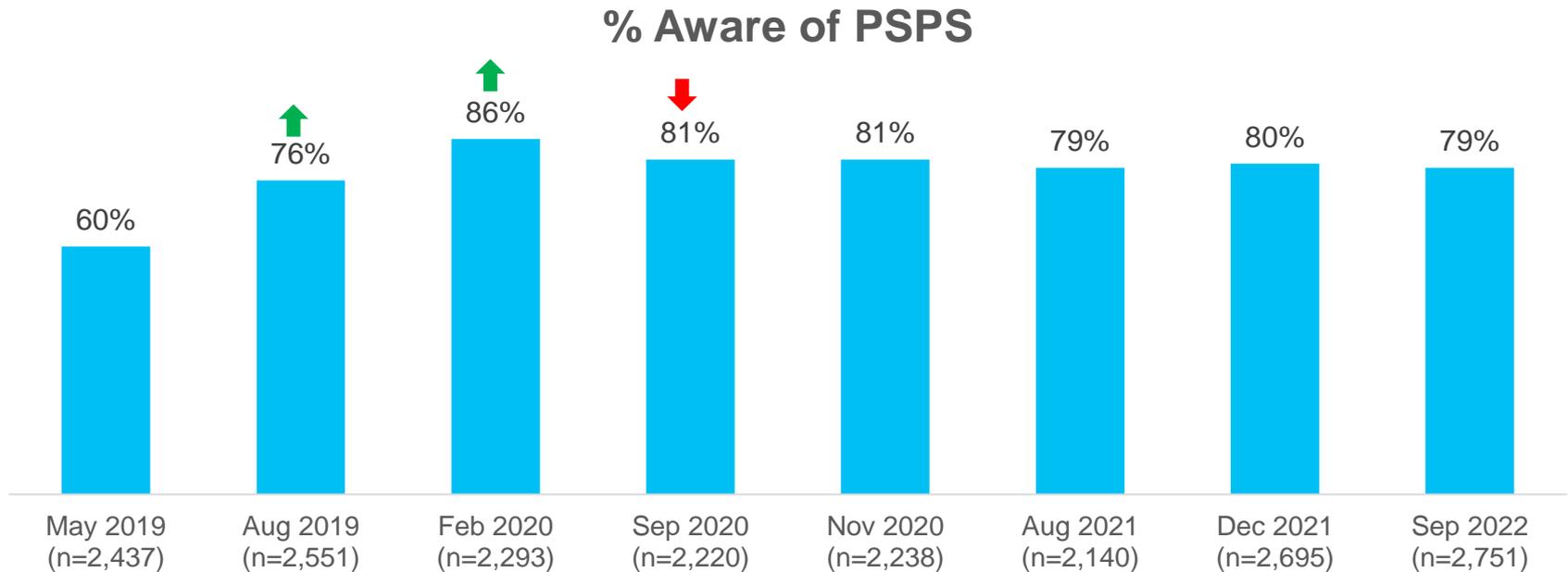


Public Safety Power Shutoff



Awareness of PSPS remains high – 79% in September 2022, in line with previous waves

- PSPS awareness is above two thirds in all DMAs, and highest in Eureka (88%) and Chico-Redding (87%)
- Awareness is significantly higher in Tiers 2 & 3 (96%) than in Tier 1 (77%)



↓ ↑ Arrows signify statistical difference at the 95% confidence level compared to the previous wave

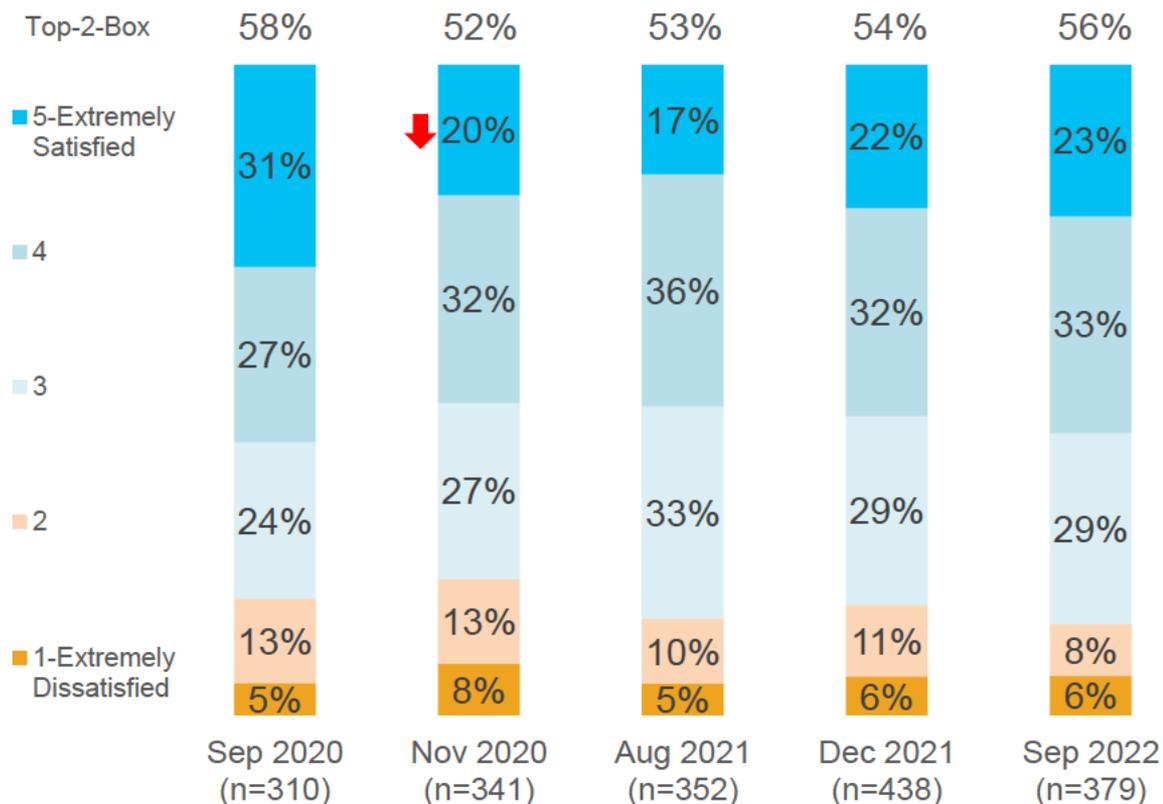
Q16. Public Safety Power Shutoff, or PSPS, is a precautionary safety measure where PG&E may proactively turn off power lines when extreme fire danger conditions are forecasted, in order to reduce the risk of wildfires. Before today, had you ever heard of the Public Safety Power Shutoff program? Base: Total (n=2,751)



Over half are satisfied with PSPS information on the PG&E website, consistent with previous waves

Satisfaction With PSPS Information on PG&E Website

(saw PSPS Information on PG&E website)



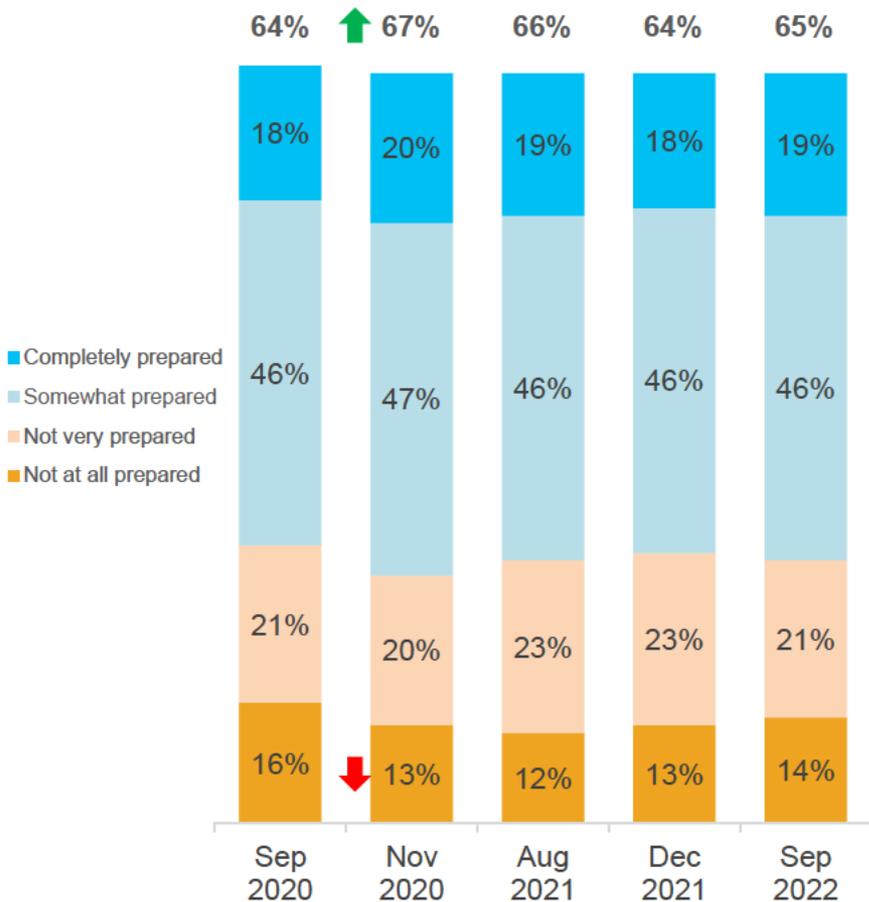
Arrows signify statistical difference at the 95% confidence level compared to the previous wave

Q18B. How satisfied were you with the Public Safety Power Shutoff information provided on the PG&E website? Base: Saw PSPS Information on PG&E website (n=379)



Nearly two thirds say they are prepared for a PSPS event, in line with December and August 2021 results

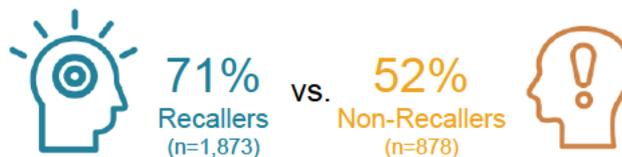
Preparedness for PSPS



Consistent with previous waves, those in Tiers 2 and 3 are more likely to say they are prepared for a PSPS event

Wildfire Tiers	Top-2-Box				
	Sept 2020	Nov 2020	Aug 2021	Dec 2021	Sep 2022
Tier 1	60%	65%	62%	61%	63%
Tier 2-3	83%	84%	82%	80%	84%

As in previous waves, Recallers are more likely to say they are prepared



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Arrows signify statistical difference at the 95% confidence level compared to the previous wave

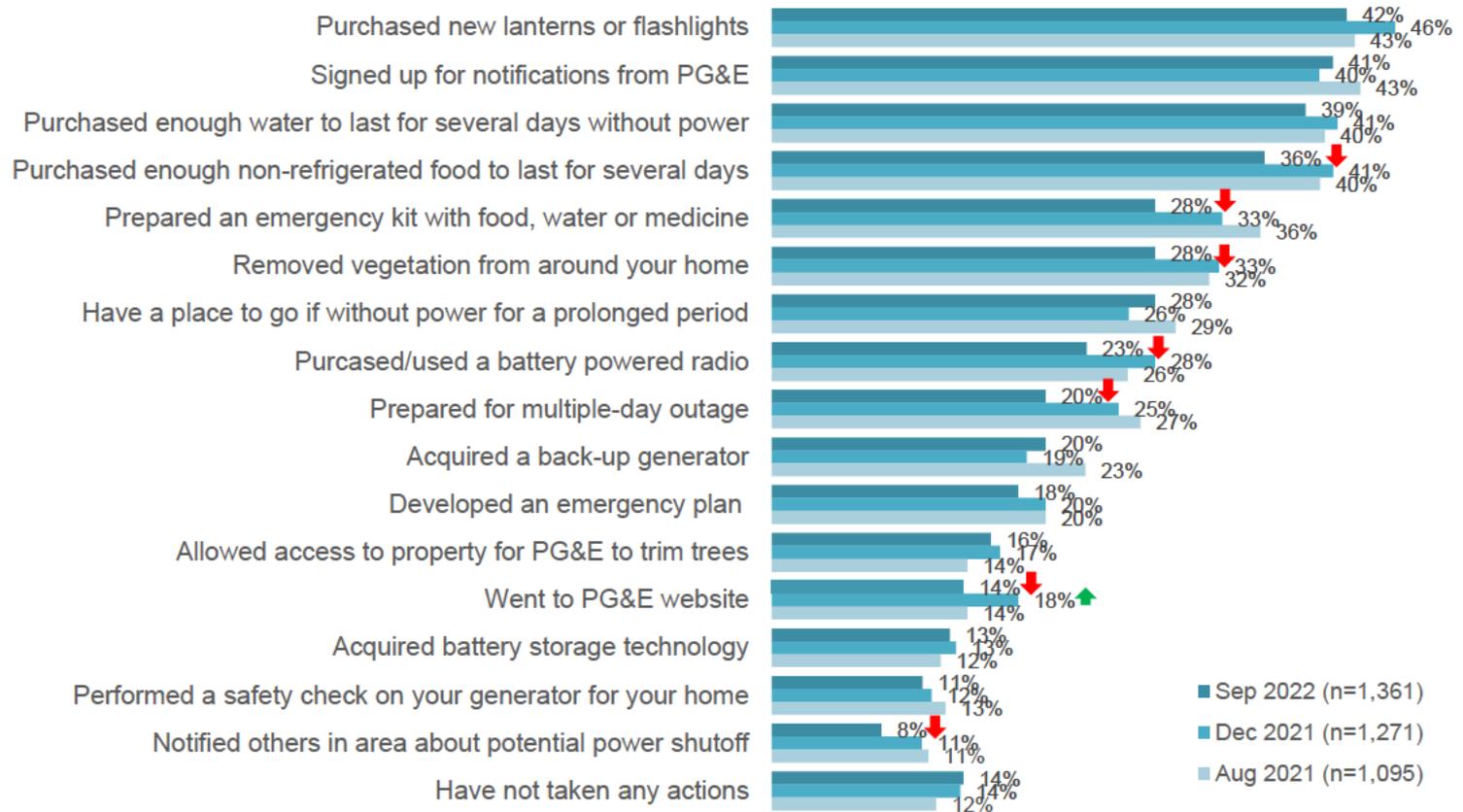
Q20. A Public Safety Power Shutoff event could last anywhere from 24-48 hours, or longer in some cases. How would you rate your level of preparedness for being without electricity for an extended period? Would you say you are...? Base: Total (n=2,751)



Purchasing new flashlights, signing up for notifications, and purchasing water are the most common steps taken

- When aided, over a quarter of respondents have somewhere to go if without power
- Recallers remain to be more likely to take any actions

Steps Taken to Prepare for PSPS* (aided – online)



Arrows signify statistical difference at the 95% confidence level compared to the previous wave

*Insufficient sample size to report on Spanish speakers

Q21. What, if any, actions have you taken to prepare for a Public Safety Power Shutoff (PSPS) in 2022—whether before, during, or after an event?

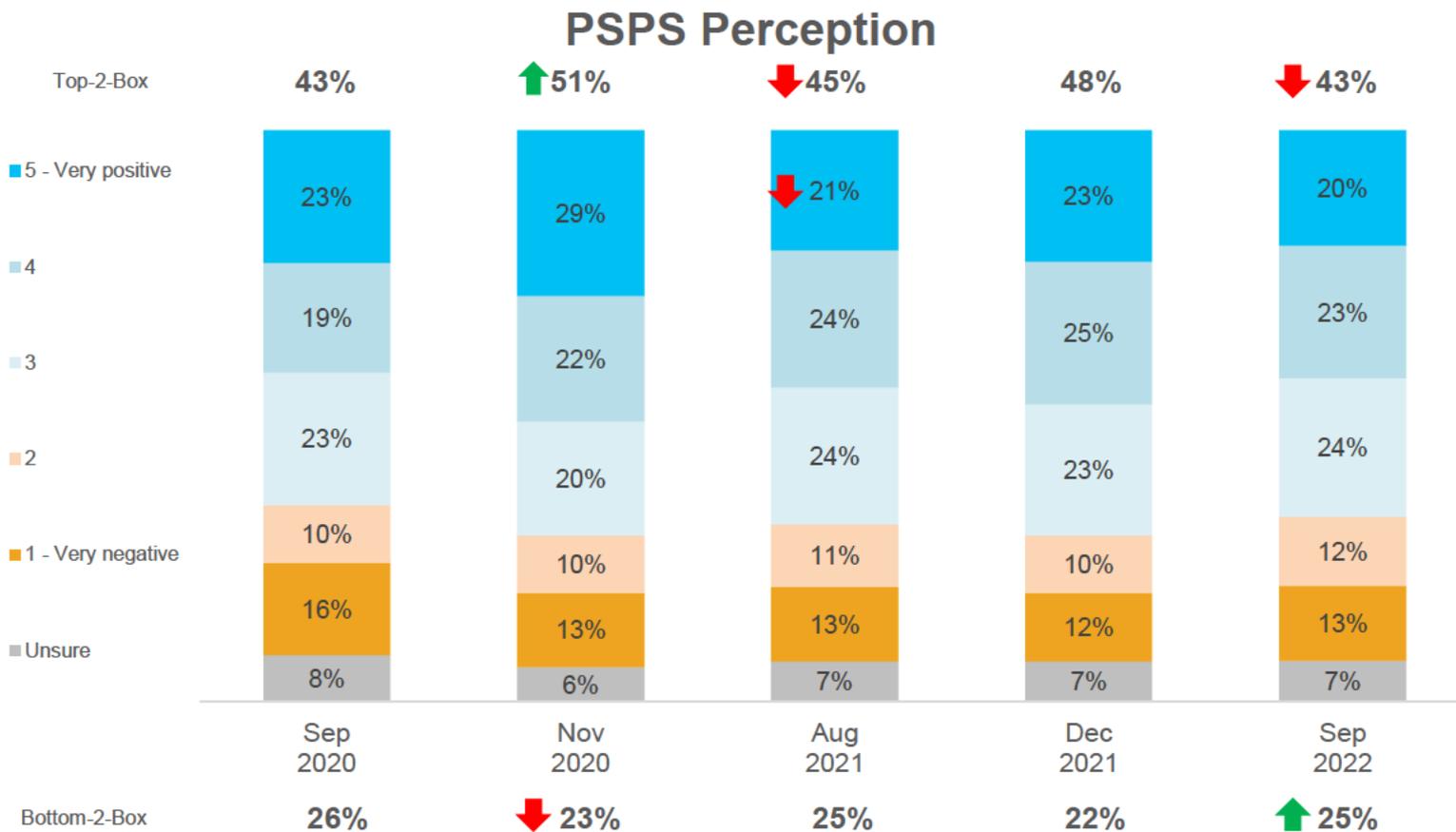
Base: Web English Total (n=1,361)

Internal



Over 4 in 10 see PG&E's PSPS program as a positive, down from December 2021

- Those with Low-Income have a more positive outlook of PSPS (53% vs 40%)



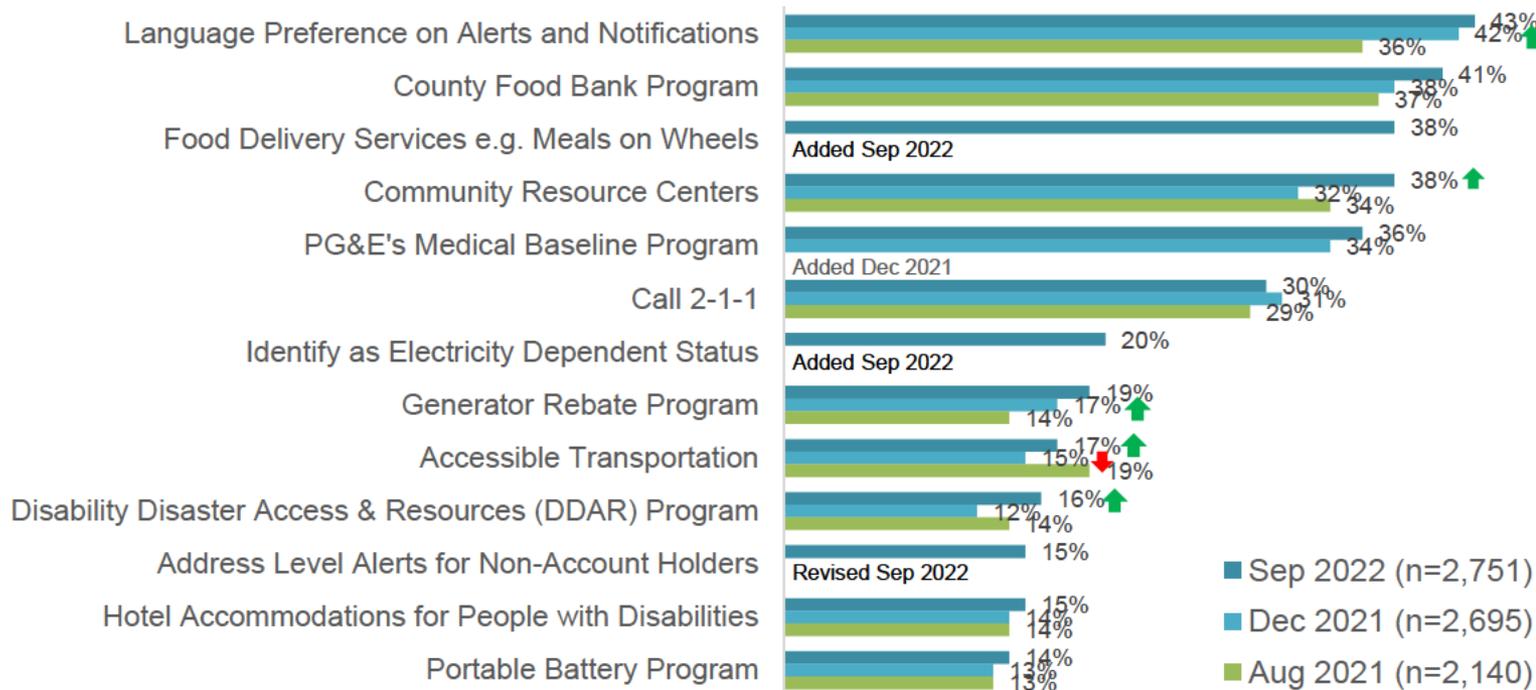
Q22. Overall, what is your opinion of PG&E's Public Safety Power Shutoff program? Base: Total (n=2,751)



Awareness is the highest for Language Preference on Alerts, followed by the County Food Bank Program

- Awareness of Disability Disaster Access and Resources (DDAR) Program, Accessible Transportation, and Community Resource Centers have increased since December 2021
- Recallers are more familiar with over half of the resources than Non-Recallers

% Aware of Resources



Arrows signify statistical difference at the 95% confidence level compared to the previous wave

N1. Before today, which of the following resources have you heard of? Base: Total (n=2,751)



Customers are most interested in Generator Rebate Program, Call 2-1-1, and Portable Battery Program

- All resources have a reported lower rate of interest compared to December 2021
- Renters are more likely to be interested in 10 of the resources reported

Interest in Resources

(n=2,751)

% Very Interested

Aug 2021 Dec 2021 Sep 2022

Resource	Unsure	1 - Not interested	2 - Somewhat interested	3 - Very interested	Aug 2021	Dec 2021	Sep 2022
Generator Rebate Program	8%	36%	21%	34%	42%	41%	↓ 34%
Call 2-1-1	11%	26%	30%	33%	39%	41%	↓ 33%
Portable Battery Program	10%	37%	22%	32%	38%	39%	↓ 32%
Community Resource Centers	9%	34%	31%	25%	32%	33%	↓ 25%
Address Level Alerts for Non-Account Holders	12%	47%	20%	22%	N/A	N/A	22%
Language Preference on Alerts and Notifications	9%	52%	17%	22%	28%	26%	↓ 22%
Food Delivery Services e.g. Meals on Wheels	8%	47%	23%	21%	N/A	N/A	21%
County Food Bank Program	8%	48%	24%	20%	23%	↑ 27%	↓ 20%
PG&E's Medical Baseline Program	10%	50%	21%	20%	N/A	33%	↓ 20%
Identify as Electricity Dependent Status	13%	49%	19%	20%	N/A	N/A	20%
Hotel Accommodations for People with Disabilities	8%	55%	17%	20%	25%	↑ 29%	↓ 20%
Disability Disaster Access & Resources Program	10%	50%	21%	19%	24%	↑ 28%	↓ 19%
Accessible Transportation	9%	53%	18%	19%	23%	26%	↓ 19%

■ Unsure ■ 1 - Not interested ■ 2 - Somewhat interested ■ 3 - Very interested

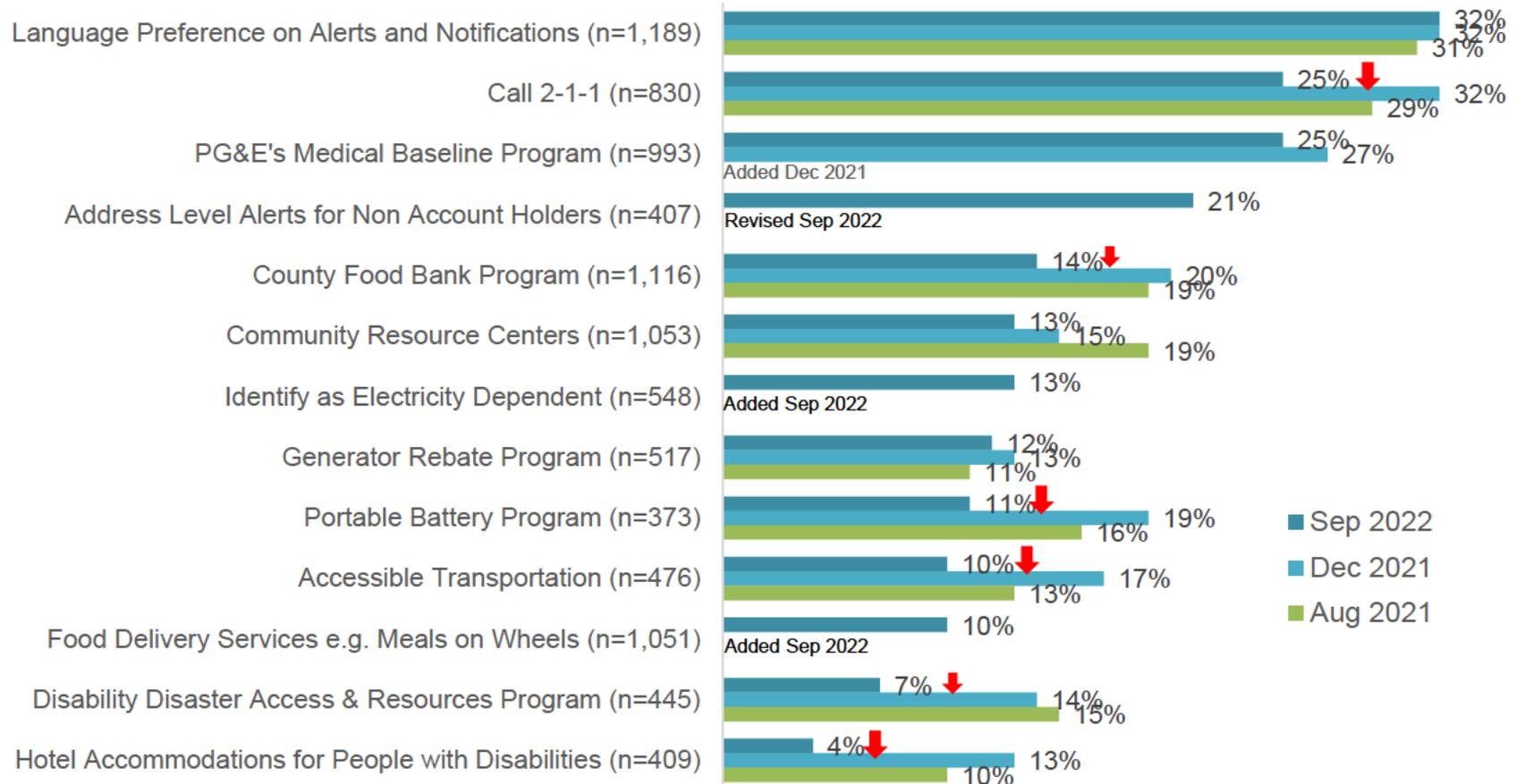
N2. For each resource, please rate how interested you would be in using it during a Public Safety Power Shutoff? Base: Total (n=2,751)



Of those aware, just under one third have used Language Preferences on Alerts During a PSPS event

- Recallers are more likely to say they have used Language Preferences on Alerts
- Non-Recallers are more likely to say they have used PG&E's Medical Baseline Program

% Used Resources in the Past



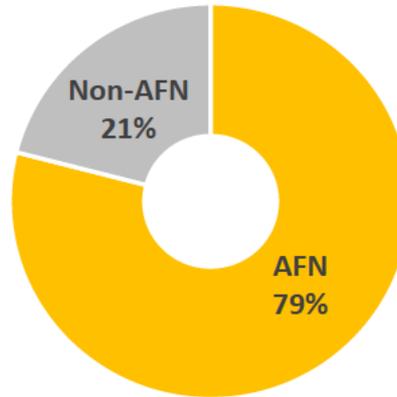
Arrows signify statistical difference at the 95% confidence level compared to the previous wave

N3. Which, if any, of these resources have you used in the past?
Base: Aware of resources (n varies)



General Population / AFN Comparison

AFN Population



	General Population	AFN (Overall)
Recall of the Communications	68% - Significantly higher in 2022 compared to both the 2021 Pre-Season (59%) and 2021 Post-Season (55%) waves.	69% - Significantly higher in 2022 compared to both the 2021 Pre-Season (59%) and 2021 Post-Season (53%) waves.
Satisfaction with PG&E's Overall Wildfire Safety and Preparedness Efforts	46% (T2B) - Significantly higher compared to the 2021 Pre-Season wave (42%).	52% (T2B) - Significantly higher than the Non-AFN population (30%).
Awareness of PSPS	79% - No change statistically from prior waves	78% - No change statistically from prior waves
Level of Preparedness for PSPS	65% - No change statistically from prior waves	68% - No change statistically from prior waves

Appendix



Methodology (AFN Assignment)

AFN (ACCESS & FUNCTIONAL NEEDS)

Variable	Specification	Source	Sample Size
Vulnerable (Net)			1,951
Vulnerable (Sub-Net)			169
Vulnerable	Yes	From PG&E Sample List	14
Access to Transportation	No	D7: "Do you have access to transportation in case of an emergency?"	155
Language (Sub-Net)			211
Language Preference	Not English	Q3: "What is your preferred language for receiving public safety information like this from PG&E?"	156
Language Survey Taken In	Not English	Survey language choice	196
Language Preference	Not English	From PG&E Sample List (CC&B)	61
Low-Income (Sub-Net)			1,114
Low Income Propensity	Yes	From PG&E Sample List	778
Income <\$30K	Under \$30K	From PG&E Sample List	380
CARE	Yes	From PG&E Sample List	768
FERA	Yes	From PG&E Sample List	18
Elderly (Sub-Net)			1,149
Age 65 and Older	Yes	S3. "Into which of the following categories does your age fall?"	1,149
Vulnerable Senior	Yes	From PG&E Sample List	-
Disabled (Net)			944
Disability – General (Sub-Net)	Yes	From PG&E Sample List	58
Disability	Under \$30K	From PG&E Sample List	47
Has Disability (Unspecified)	Yes	D8. Do you or does anyone in your household have a permanent disability, related to mobility, hearing, vision, cognitive, psychological, or chronic disease? D9. No to all specific disabilities	11



Methodology (AFN Assignment, cont.)

AFN (ACCESS & FUNCTIONAL NEEDS)			
Variable	Specification	Source	Sample Size
Disability – Specific – Non-Vision (Sub-Net)	Yes	From PG&E Sample List	551
Difficulty Hearing	Yes	D9B. “Are you or is anyone in your household deaf or have serious difficulty hearing?”	205
Difficulty Walking	Yes	D9C. “Do you or does anyone in your household have serious difficulty walking or climbing stairs?”	393
Difficulty Concentrating	Yes	D9D. “Because of a physical, mental, or emotional condition, do you or does anyone in your household have serious difficulty concentrating, remembering, or making decisions?”	244
Difficulty Dressing/Bathing	Yes	D9E. “Do you or does anyone in your household have difficulty dressing or bathing?”	148
Difficulty Shopping/Visiting Doctor	Yes	D9F. “Because of a physical, mental, or emotional condition, do you or does anyone in your household have difficulty doing errands alone such as visiting a doctor’s office or shopping?”	287
Use Assistive Technology	Yes	D9G. “Do you or anyone in your household rely on assistive technology?”	56
ASTVTECH	Yes		15
Disability – Specific Vision (Sub-Net)			109
Vision Impaired	Yes	From PG&E Sample List (includes Large Print and Braille)	25
Difficulty Seeing	Yes	D9A. “Are you or is anyone in your household blind or have serious difficulty seeing, even when wearing glasses?”	91
Medical Equipment Needs (Sub-Net)			673
Medical Baseline	Yes	From PG&E Sample List	263
Medical Needs In-Home	Yes	D6. “Do you, or does anyone in your household, rely on electricity for medical needs or medical equipment?”	600
DME	Yes		95
TOTAL AFN (NET)			2,161
TOTAL RESPONDENTS			2,752
PERCENT AFN			79%

Thank you

Customer Experience & Insights

