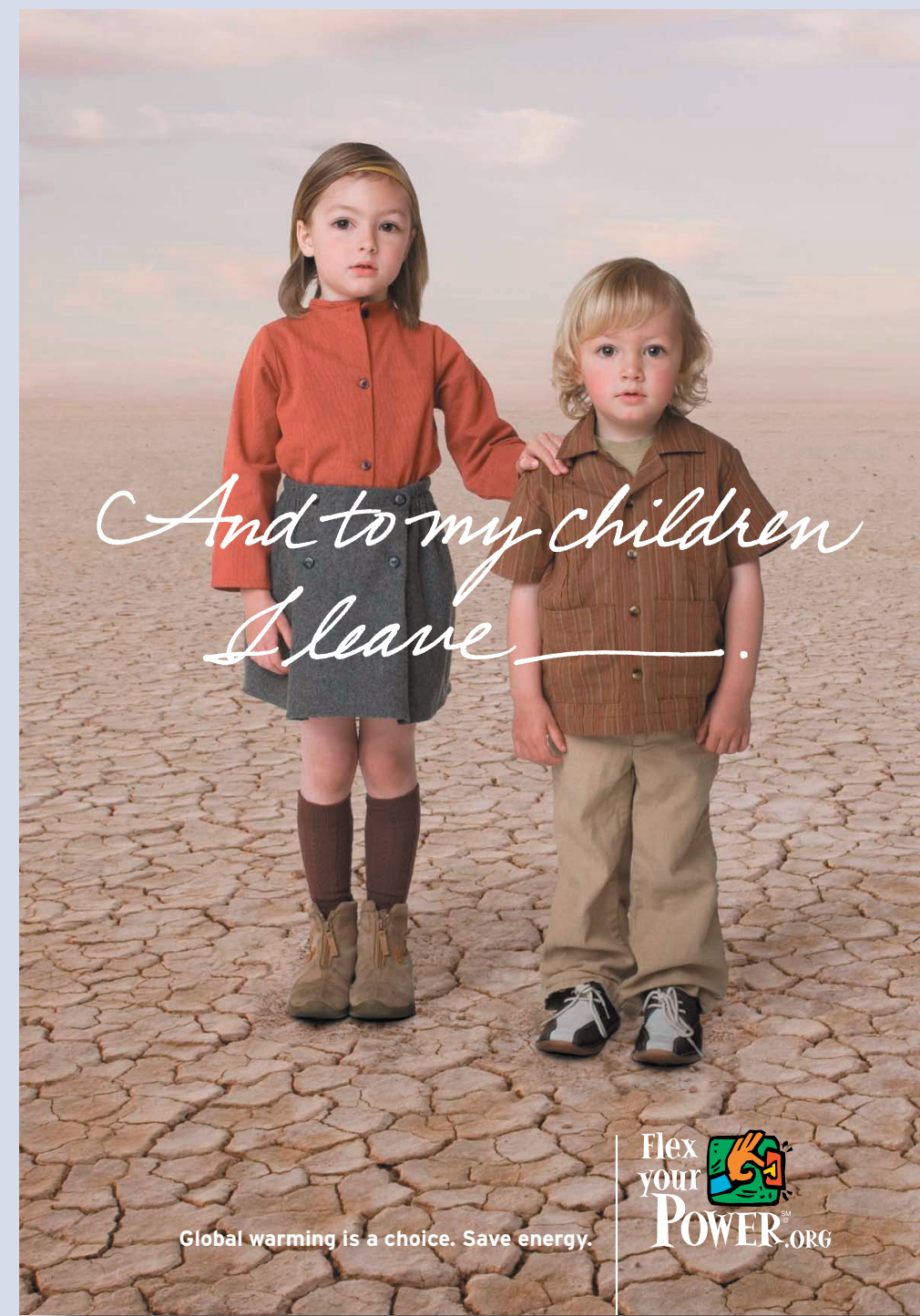


Behavioral Energy Savings: Going Beyond Resource Acquisition Programs

Opinion Dynamics Corporation is a leader in providing market research and evaluation of non resource allocation programs. Whether formulating marketing messages upfront, or evaluating the effectiveness of a program after its launch, Opinion Dynamics brings a wealth of experience to any marketing effort. Opinion Dynamics has worked on a range of issues from health to recycling, with a specialty in providing upfront market research and comprehensive evaluations of energy efficiency and conservation efforts. Opinion Dynamics is currently conducting the largest evaluation ever conducted for an energy efficiency social marketing effort, California's Flex Your Power (FYP) campaign.



About the Flex Your Power Evaluation

The California Public Utilities Commission (CPUC) is funding a multi-million dollar evaluation of the Flex Your Power program, which utilizes mass media advertisements and other non-media efforts to help consumers understand the relationship between household energy use and global warming. Behaviors promoted by the program include the adoption of compact fluorescent lamps (CFLs), energy efficient appliances, heating, and cooling systems.

Opinion Dynamics has been charged with assessing the energy-savings impact of the Flex Your Power program to determine its relevance in, and impact on, the California market. In other words, what influence does this social marketing effort have on Californians' energy habits?



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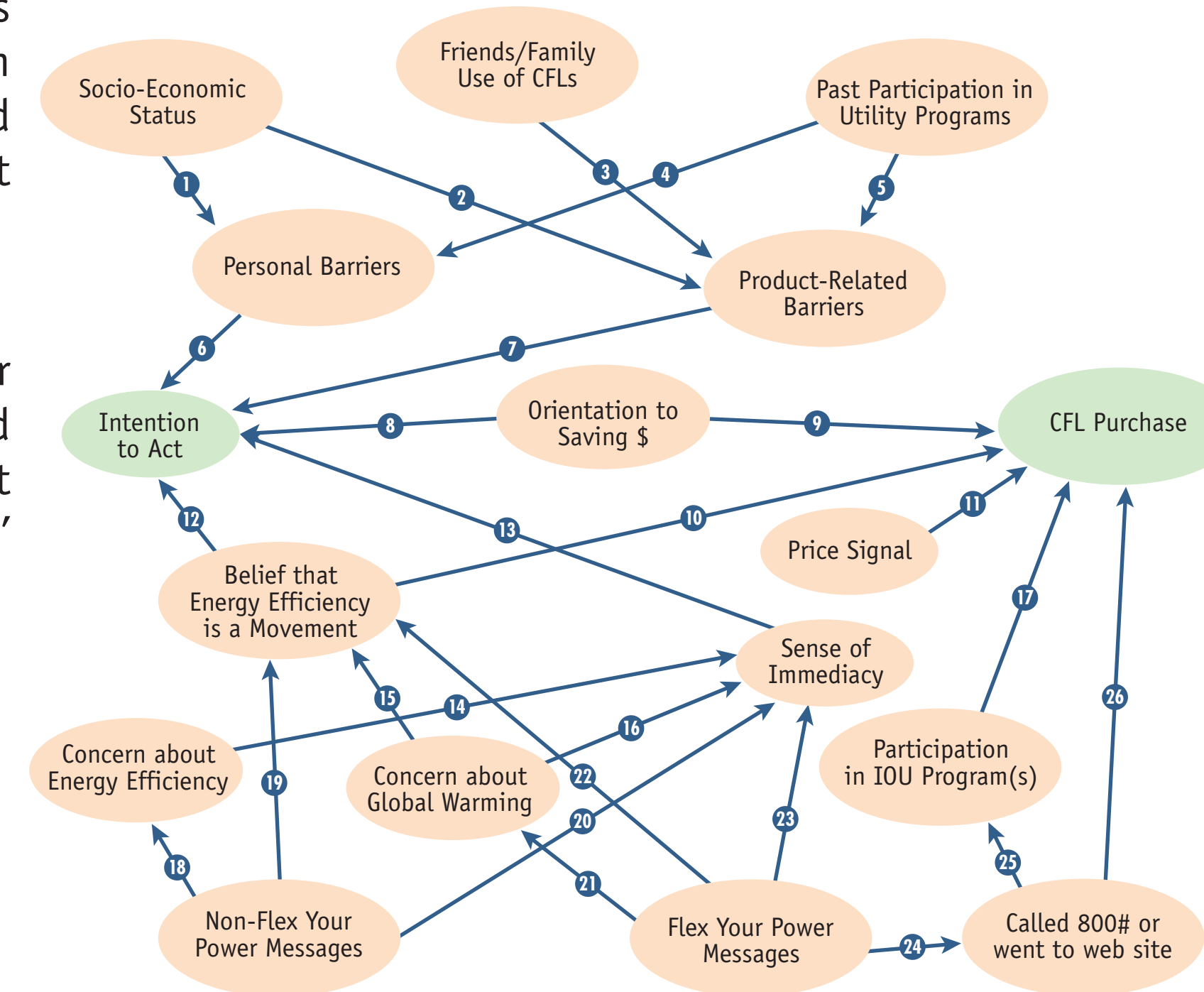
Evaluate the relative effects of social marketing while accounting for other variables that drive behaviors

Structural Equation Modeling (SEM)

This method allows us to tease out effects of a particular effort when many other influences may also be at play. This is of greatest use when several similar but distinct efforts are being conducted at the same time. For instance, many organizations have recently developed global warming social marketing campaigns—SEM allows us to isolate the unique effects of one campaign. This statistical technique is used to test and estimate causal relationships using a combination of statistical data and qualitative causal assumptions. This analysis allows the Opinion Dynamics team to conduct a comprehensive and thorough analysis of factors that drive behaviors.

FINDINGS

- 50% of the variance in consumer behavior intention was predicted by personal barriers, product barriers, and friends and families' use of CFLs



Examine how website browsers use online tools to gain information and to take action

Web Statistics Analysis

In the evolving social marketing world, online campaigns can reach targeted populations in a more cost-effective way. Web Statistics analysis allows us to quantify the success of online program efforts. We can track referrals, click-thrus and browsing behaviors of website visitors. We can then generate a comprehensive map of visitor online behaviors.

FINDINGS

- 38% of website browsers are visiting the residential pages
- 98% of browsers are clicking-thru to other linked sites to take action

Sites Sending People to Flex Your Power

Approximately 10,000 sites referred visitors to Flex Your Power (top 200 sites brought in 86% of visitors)

- 64% of all referrals from search engines
- Flex Your Power most used search term
- TV/Radio station sites brought in 3 times more visitors than paid sites, mostly due to buys through m2media

Flex Your Power Website

Close to 3 million visits in 2006 & 2007 (1.1 million in 2006 & 1.8 million in 2007)

- Daily visits to the website increased by 33% during campaign seasons
- Amongst the top 45 most viewed pages:
 - Residential pages - 38%
 - Homepage - 30%
 - Commercial pages - 11%
 - Energy news pages - 8%
 - Rest of pages - 13%
- Rebate, service and incentive pages were viewed 123,053 times with 91% of those targeting residential consumers

Sites Where People go from Flex Your Power

Viewers went to 614 sites from Flex Your Power

Of the top 50 click-throughs to external sites:

- 64% were to IOU and third party demand side management groups
- 34% were to tax incentive sites

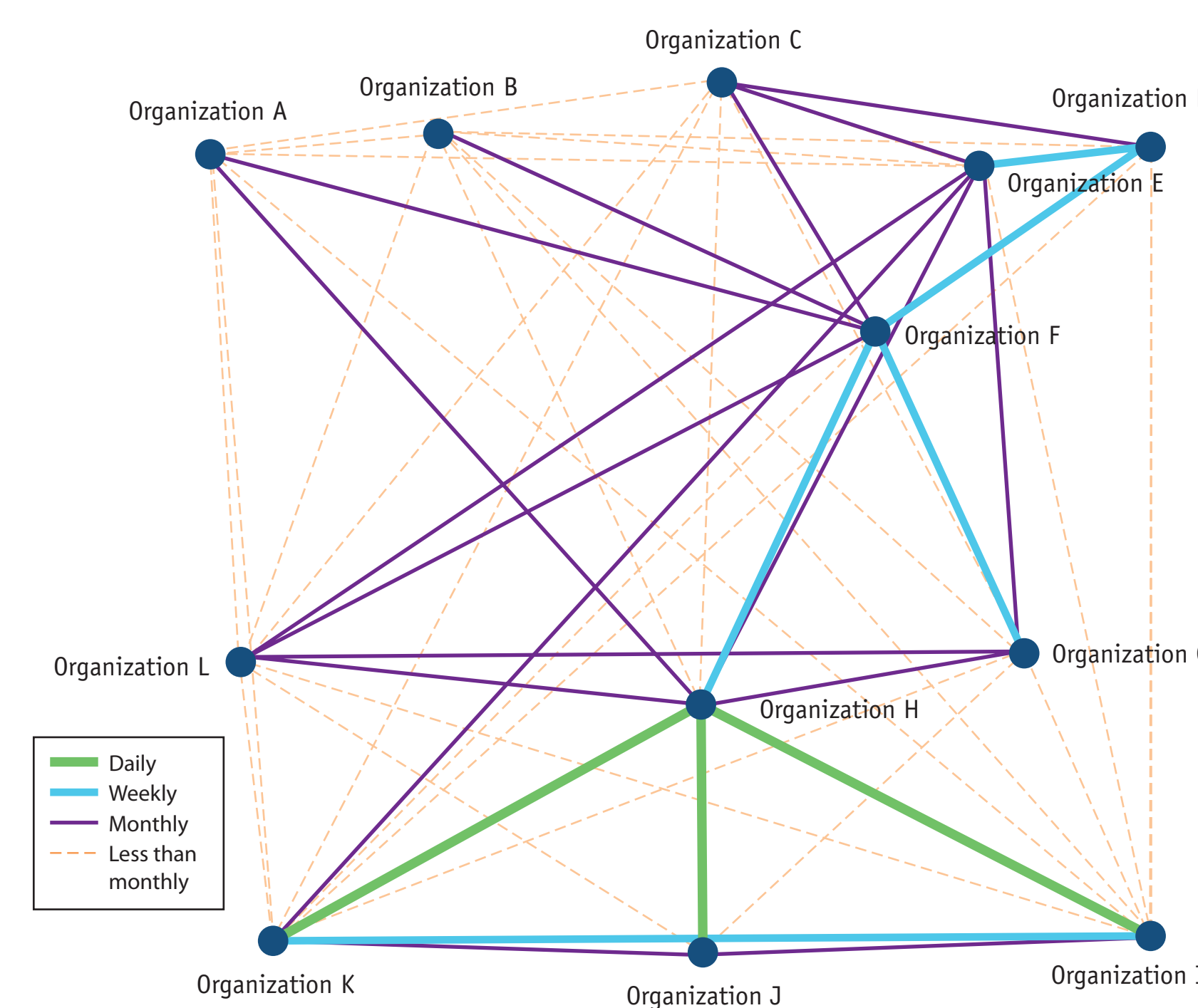
Improve program implementation by identifying the strength, value, and role of individual actors and organizations

Social Network Analysis

Social Network Analysis is a technique used to assess the overall level of network connectedness, the importance of individual actors, and the presence of communication channels. The Opinion Dynamics team utilizes this method to gain insights into program structure, meetings, and organization to enhance and facilitate efficient and effective social marketing program implementation.

FINDINGS

- Implementers are sufficiently networked to effectively execute program marketing and outreach objectives
- Leadership needs to be strengthened to ensure program objectives align with regulatory goals
- Central network players must be utilized to maintain the strength of the network



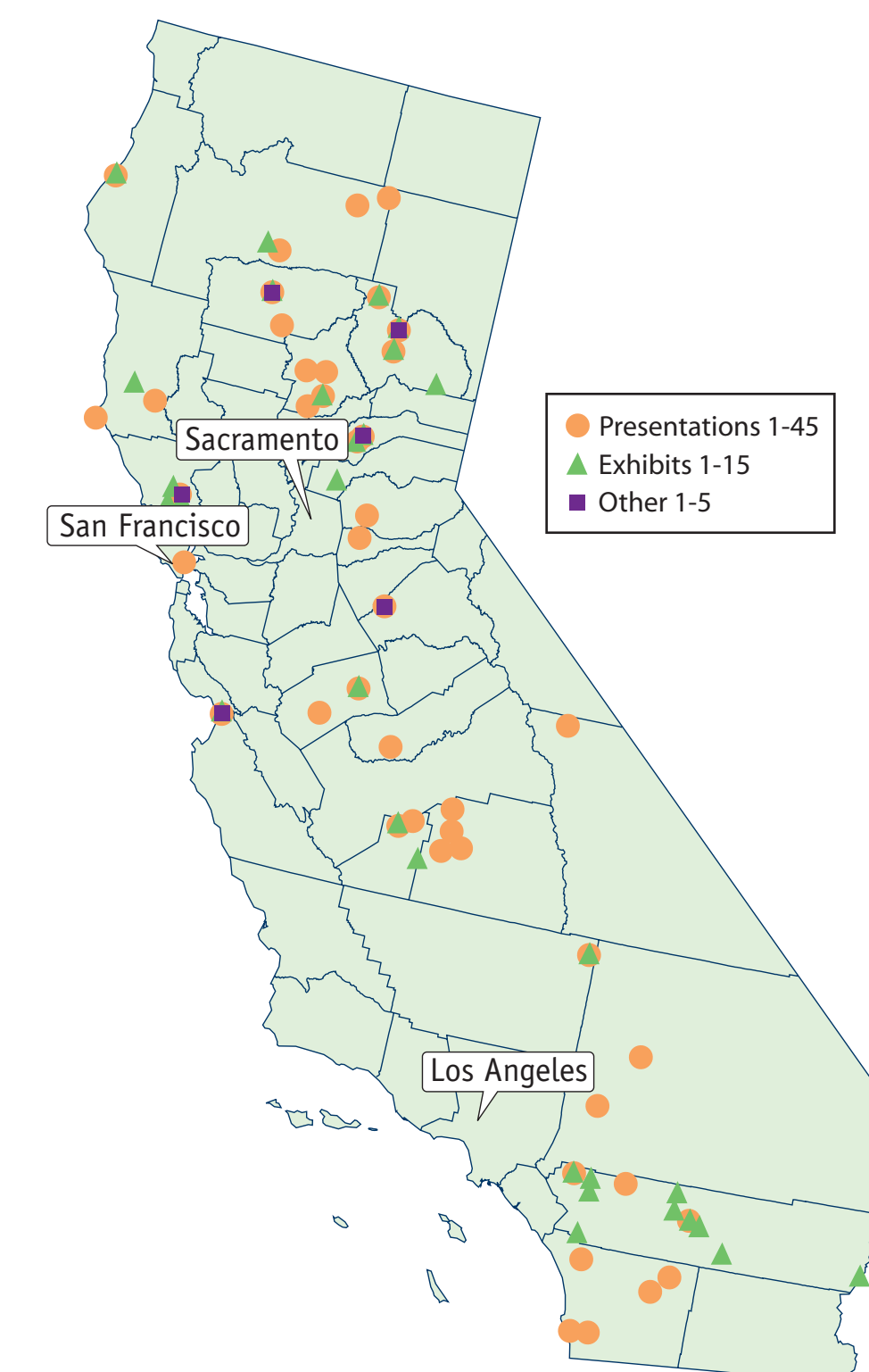
Assess the efficacy of statewide events in gaining reach and providing depth of information

Dissemination Analysis and Ethnographic Observations

This method allows us to understand the depth and breadth of a non resource allocation program, and provides the program implementer with an unadulterated view of program reach. Used as a two-pronged method, we map and quantify the geographic dispersion of information and the number of potential individuals "touched" by this information. Ethnographic observations provide in-depth qualitative findings to better illustrate the efficacy of information transmission at each event.

FINDINGS

- In 2006 and 2007 the program touched 984,060 rural residents
- Events draw on regional knowledge to communicate program information in a manner that is relevant to its audience



Determine the actual reach of program messaging and examine the recall and behaviors of those exposed

Verified Reach Technology using Exciting New Methods

Verified Reach Technology is an innovative approach that allows us to know exactly how many times panelists were exposed to a social marketing radio or TV advertisement. We then follow up with these panelists via telephone and ask about their recall of the messages and whether they have taken any action. This method allows us to avoid relying on self-reported information for assessing awareness and recall of messages. Although limited by the number of panel respondents, it provides us with a window into the actual behavioral success of a social marketing effort.

FINDINGS

- 83% of panelists (all based in or near Los Angeles) were exposed to at least one Flex Your Power radio or TV advertisement
- The program appears to be effectively reaching its stated age targets
- 74% of those exposed to at least one Flex Your Power advertisement recalled the ads

