



Dominion East Ohio Energy Choice

[REDACTED] | November 13th, 2014

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Methodology

- From October 6th to October 30th, 2014 PSB surveyed a total of 802 Dominion East Ohio customers. PSB targeted both residential and non-residential customers, all customers participating in Energy Choice programs.
- The margin of error for this study is +/- 3.46%, and larger for the following sub-groups

AUDIENCE	N-SIZE*	MARGIN OF ERROR
All	802	+/- 3.46
Energy Choice	362	+/- 5.13
SCO	163	+/- 7.66
MVR	277	+/- 5.87
Residential	402	+/- 4.87
Non-residential	400	+/- 4.88

Recap of what we learned from the focus groups

1. There is a general need to educate customers about their options for choosing a natural gas supplier
2. There is an opportunity to generate interest in the programs by emphasizing potential cost-savings and control
3. But the main obstacle to driving engagement is the perception that it will require too much time and effort
4. Customers want a website that provides plain-language descriptions of each program up front, an interactive tool that allows them to compare suppliers directly and charts with historical pricing data



Executive Summary

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The Big Takeaways

- 1 RAISING AWARENESS OF RATE PLAN OPTIONS IS ESSENTIAL TO HELPING CUSTOMERS MAKE INFORMED DECISIONS.** Customers are confused and uncertain about what various rate plan options are available to them– and most don't know what plan they are currently enrolled in.
- 2 TWO MAIN FACTORS ARE PREVENTING CUSTOMERS FROM CHOOSING PLANS: CONCERN THAT THEY WON'T SELECT THE RIGHT PLAN, AND CONCERN THAT IT WILL TAKE TOO MUCH TIME.** Customers like the idea of selecting their supplier and rate contract based on contract specifics, but aren't confident that they will select the right plan. Non-residential and SCO customers are busy and worry that it will take too much time to select a provider.
- 3 HOWEVER, THE ABILITY TO CHOOSE SPECIFICS OF A RATE PLAN AND SELECT A LOWER PRICE IS ENTICING TO THEM.** Customers see being able to choose a supplier based on length of contract, presence of termination fees, and more specifics as the main benefit of participating in Energy Choice.
- 4 THE APPLES TO APPLES SITE IS AN EXCELLENT TOOL FOR HELPING CUSTOMERS MAKE EASY DECISIONS.**



RAISING AWARENESS OF RATE PLAN OPTIONS IS
ESSENTIAL TO HELPING CUSTOMERS MAKE
INFORMED DECISIONS.

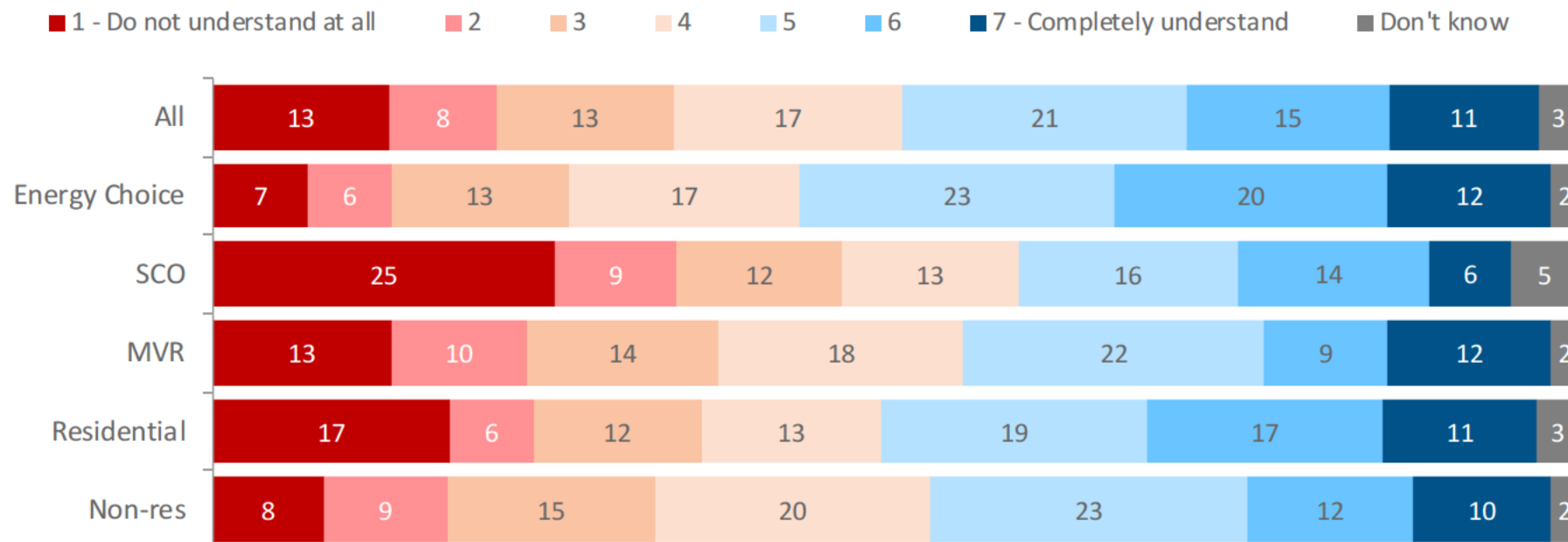
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There is a significant lack of understanding of rate plans

- 1 in 4 SCO customers say that they do not understand their current rate plan at all

UNDERSTANDING OF CURRENT RATE PLAN

How well would you say that you understand your current rate plan? Please answer on a numeric scale of 1 to 7, with 1 meaning "Do not understand at all" and 7 meaning "Completely understand."
Showing %

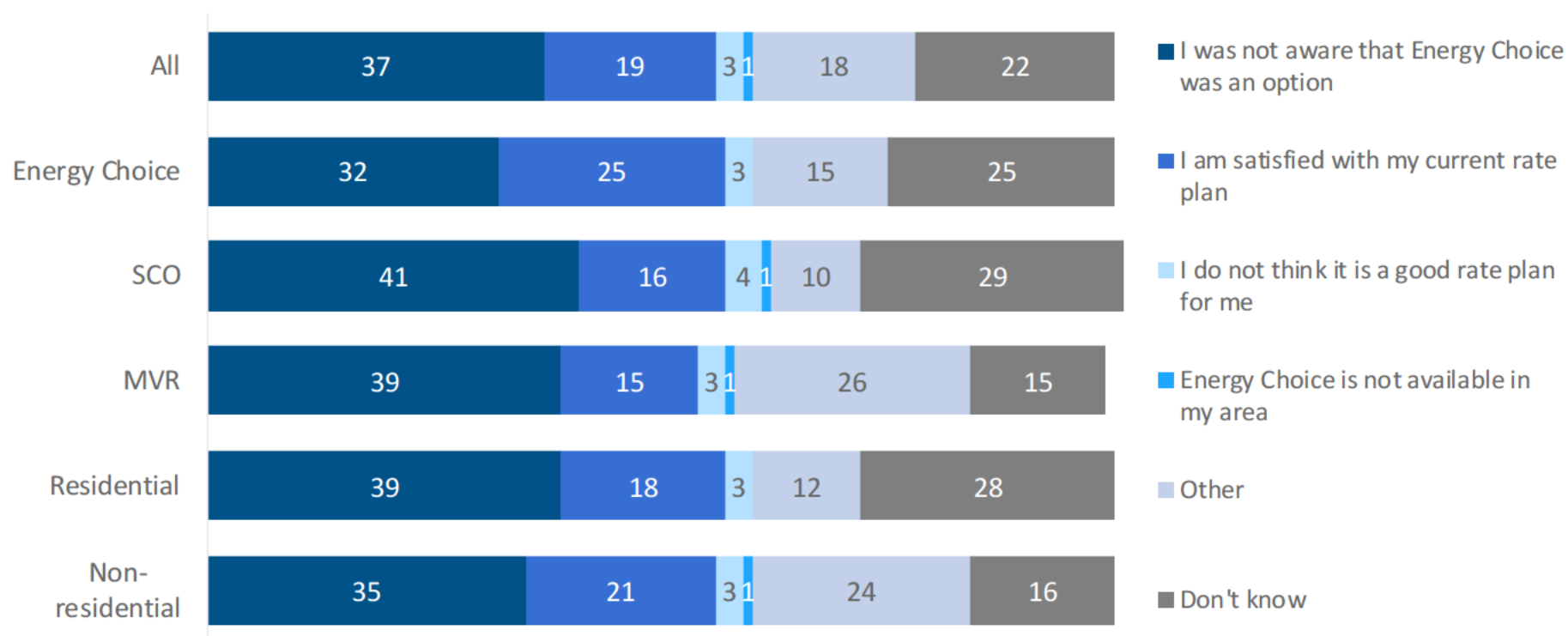


Customers tend to say they have not enrolled in Energy Choice because they do not know about it

REASONS FOR NOT ENROLLING IN ENERGY CHOICE

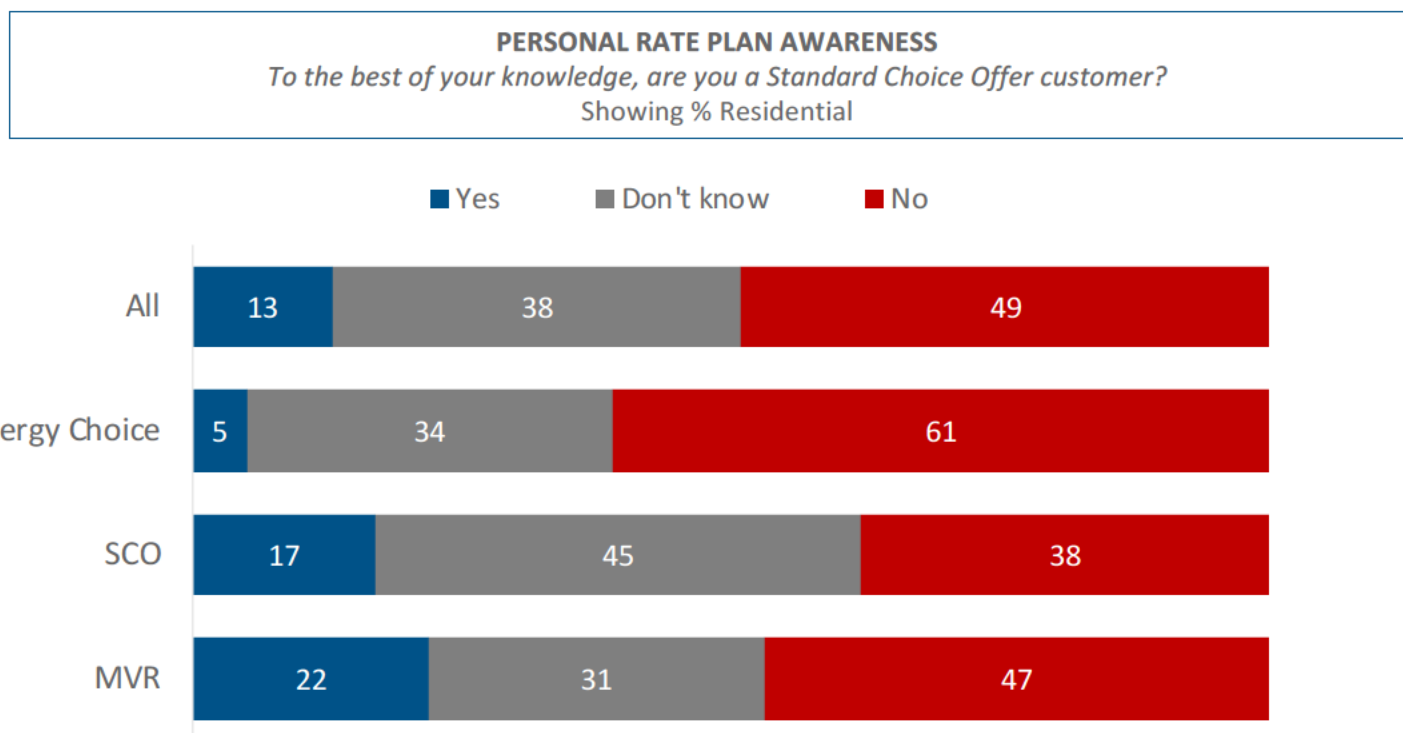
Why haven't you enrolled in Energy Choice?

Showing %



Most SCO customers are not sure if they are an SCO customer

- Close to half of SCO customers say that they don't know if they are an SCO customer

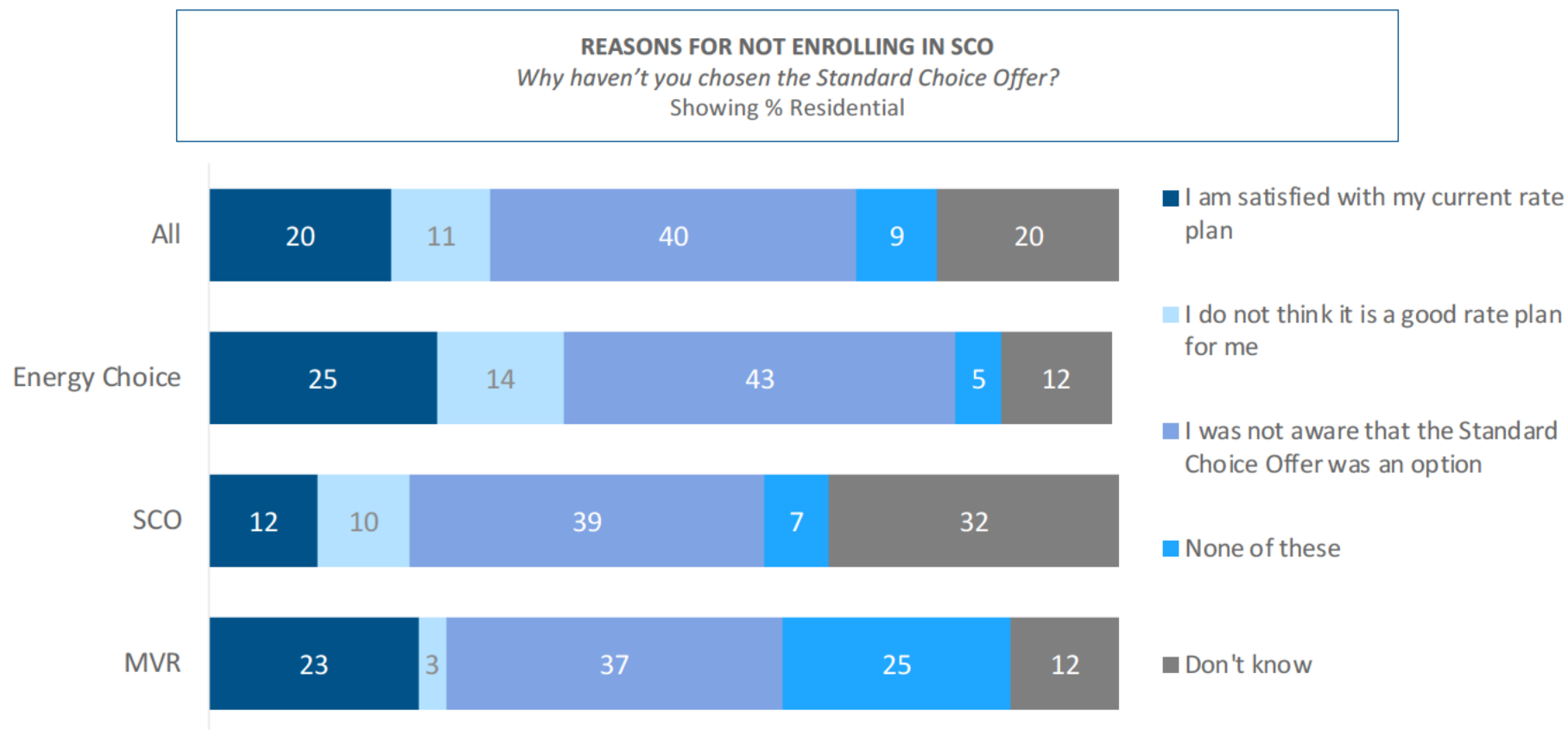


SCO customers tend not to have reviewed their rate plan options

How often do you review your natural gas rate plan options? Showing %	All	Energy Choice	SCO	MVR	Residential	Non-Residential
Once a year	36	41	22	36	33	38
I have not reviewed my options	26	24	36	24	27	26
Every six months	12	12	10	14	13	12
Once every two years	8	9	6	7	6	9
Every month	3	3	2	4	3	3
Never	12	9	18	12	13	11
Don't know	3	1	6	3	4	2

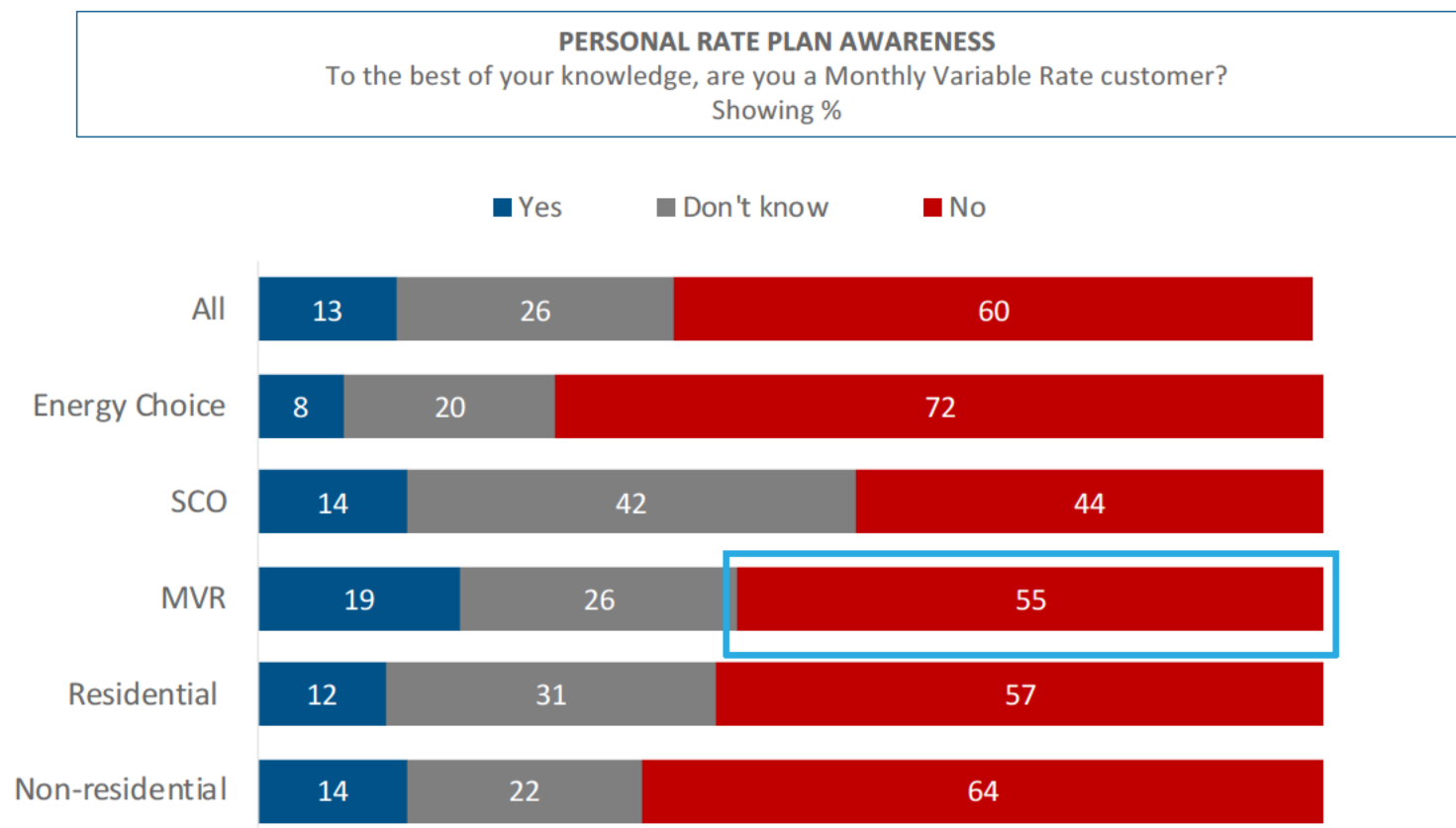
Most say they haven't chosen SCO because they didn't know it was an option

- DEO customers are overwhelmingly unaware of what rate plan options are available
- 2 in 5 are not aware that SCO was even an option



Most MVR customers don't know that they are MVR customers

- 55% of MVR customers say that they aren't an MVR customer



Most get information about their natural gas rate plan from Dominion's Energy Choice site or the PUCO site

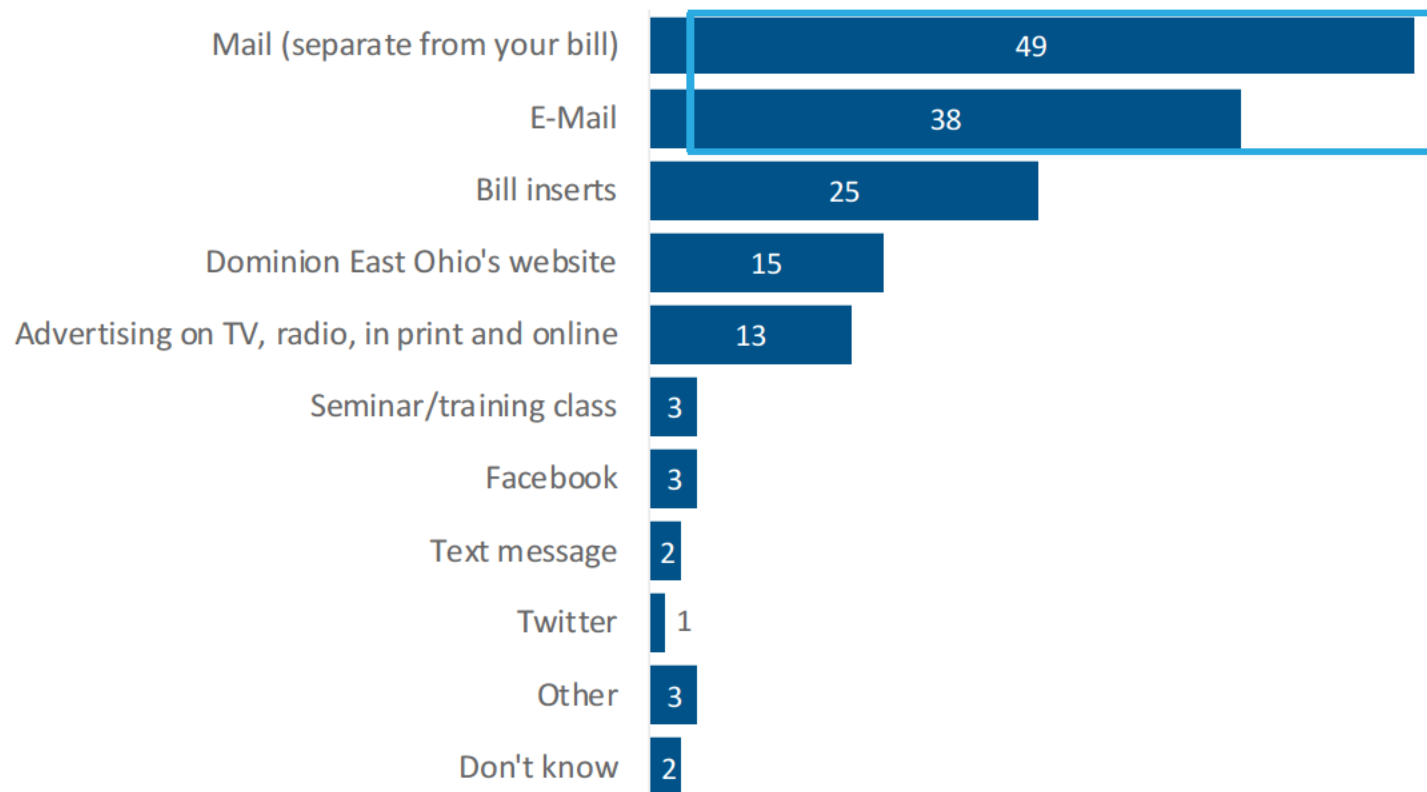
Where do you get your information about your natural gas rate plan? Showing %	Base	Energy Choice	SCO	MVR	Residential	Non-Residential
Dominion East Ohio's website	22	23	36	12	29	15
Public Utility Commission of Ohio (PUCO) website	16	19	20	9	20	12
Friends or family	9	11	8	8	9	9
The news	8	8	10	8	9	7
A third party website	8	9	5	9	6	10
My landlord	5	4	5	6	2	8
A financial advisor	1	2	0	0	0	2
Other	36	32	11	56	25	48
Don't know	14	13	29	8	20	9

Most want to hear from Dominion about rate plans through the mail and E-mail

METHODS OF COMMUNICATION FROM DOMINION ABOUT RATE PLAN OPTIONS

Which of the following methods of communication would you prefer Dominion East Ohio to use when communicating important information about rate plans?

Showing % All





TWO MAIN FACTORS ARE PREVENTING CUSTOMERS FROM CHOOSING PLANS: CONCERN THAT THEY WON'T SELECT THE RIGHT PLAN AND CONCERN THAT IT WILL TAKE TOO MUCH TIME.

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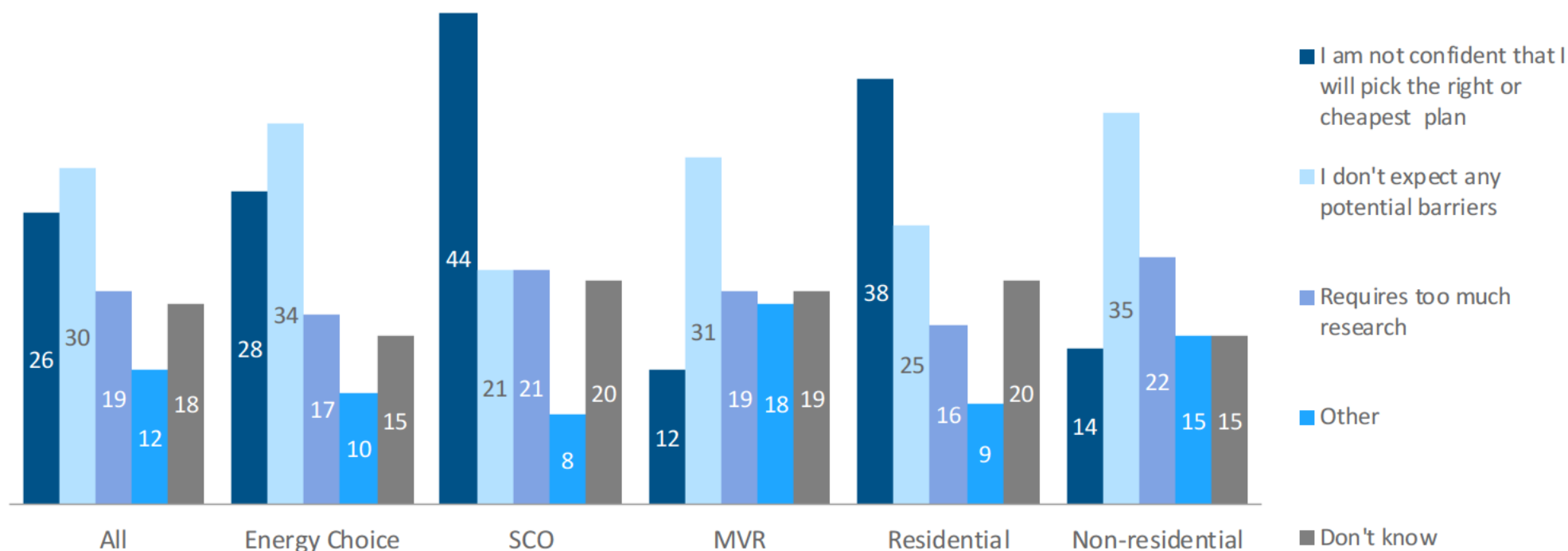
SCO customers tend to lack confidence in picking the right rate plan, and they see that as a downside of EC

- Residential customers are also more likely to be concerned that they will not pick the right or cheapest plan

POTENTIAL BARRIERS TO ENROLLING IN ENERGY CHOICE

What do you see as potential barriers to enrolling in Energy Choice?

Showing %, ranked by All

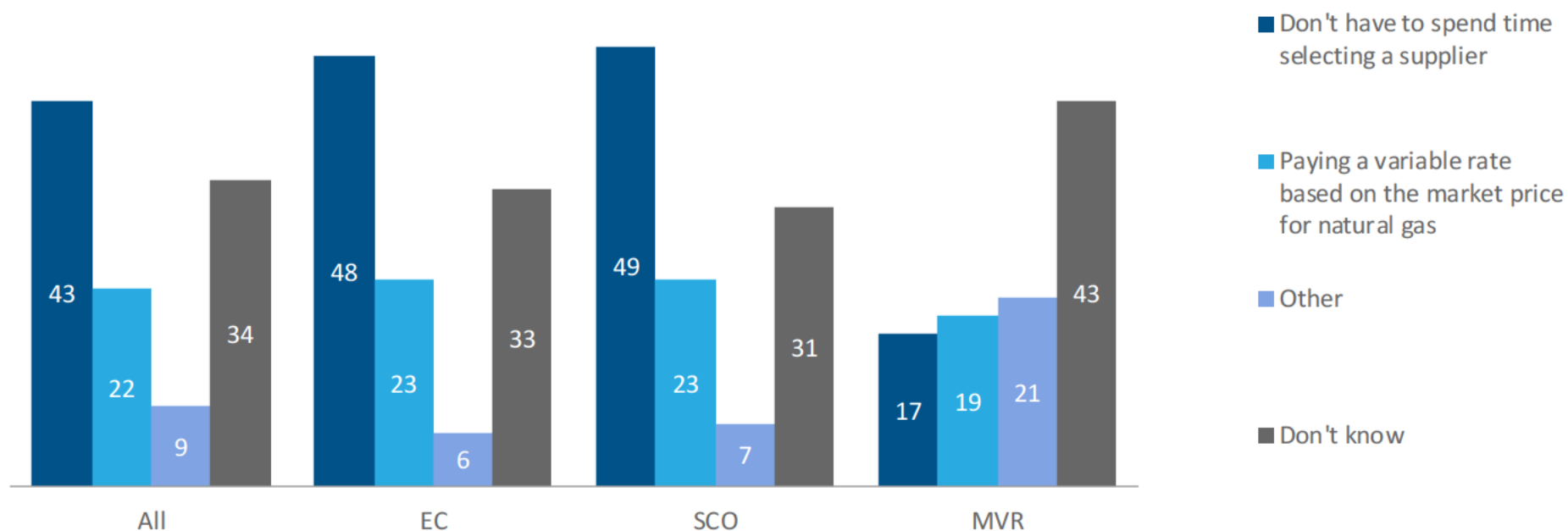


Customers see SCO's main benefit as it involves no time commitment

- This is seen as a clearer benefit than the variable rate

BENEFITS OF SCO

What do you see as the main benefits associated with being on the Standard Choice Offer?
Showing % Residential, ranked by All





HOWEVER, THE ABILITY TO CHOOSE SPECIFICS OF A
RATE PLAN AND SELECT A LOWER PRICE IS
ENTICING TO THEM.

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Most see the ability to choose based on contract specifics as the main benefit of Energy Choice

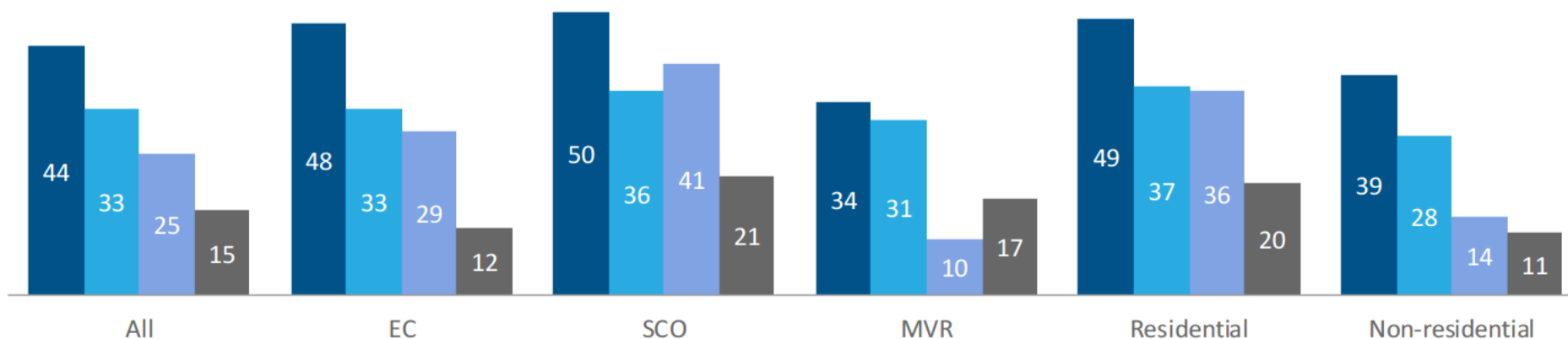
- Most say that ability to choose a supplier based on contract length, termination fees, or type of rate is the main benefit associated with Energy Choice

BENEFITS OF ENERGY CHOICE

What do you see as the main benefits associated with being in Energy Choice?

Showing %, ranked by All

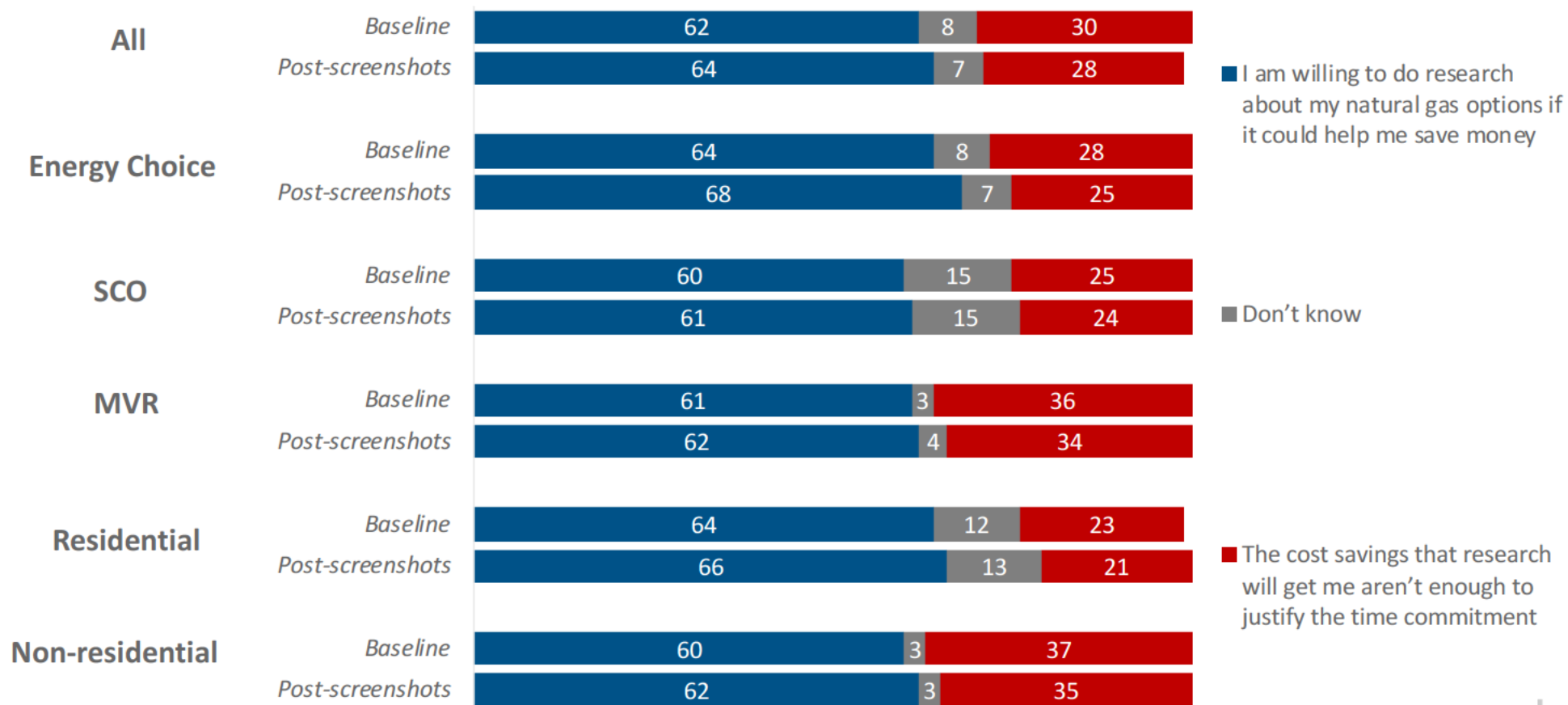
- Ability to choose a supplier based on contract length, termination fees, or type of rate (fixed or variable)
- Cost savings
- Control over my natural gas rate plan
- Don't know



Customers overwhelmingly say they are willing to do research about their natural gas rate options if it helps them save money

WILLINGNESS TO DO RESEARCH V. COST SAVINGS NOT WORTH THE WORK

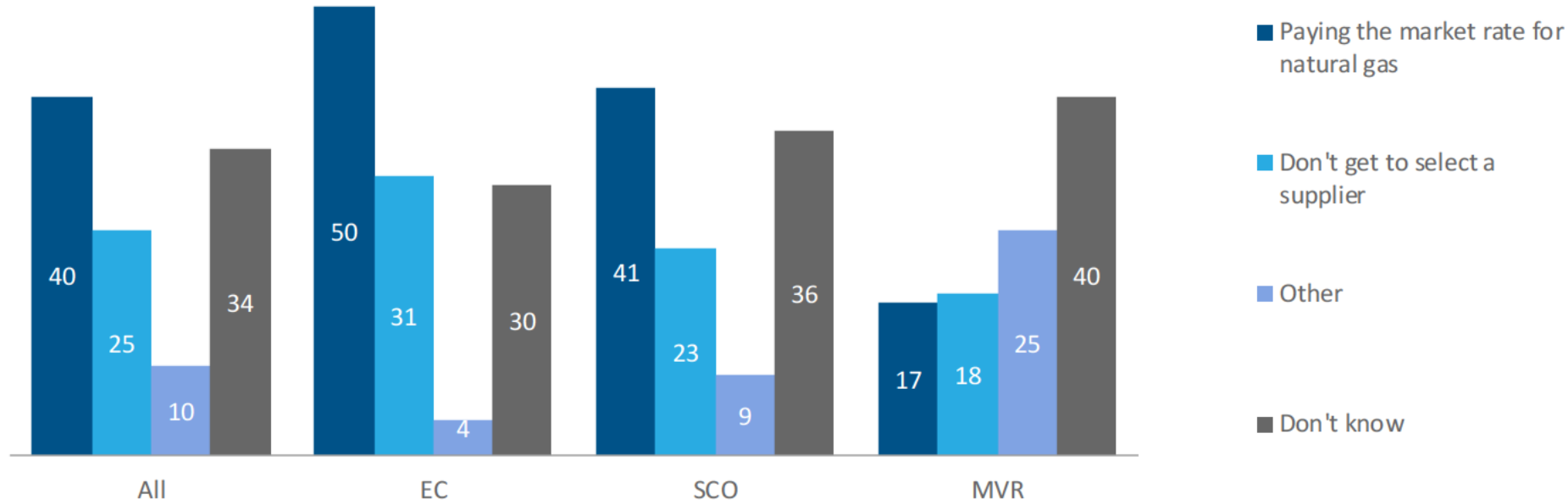
Which of the following is closer to your view?
Showing %



Most see paying a market based rate as the main disadvantage of SCO

DISADVANTAGES OF SCO

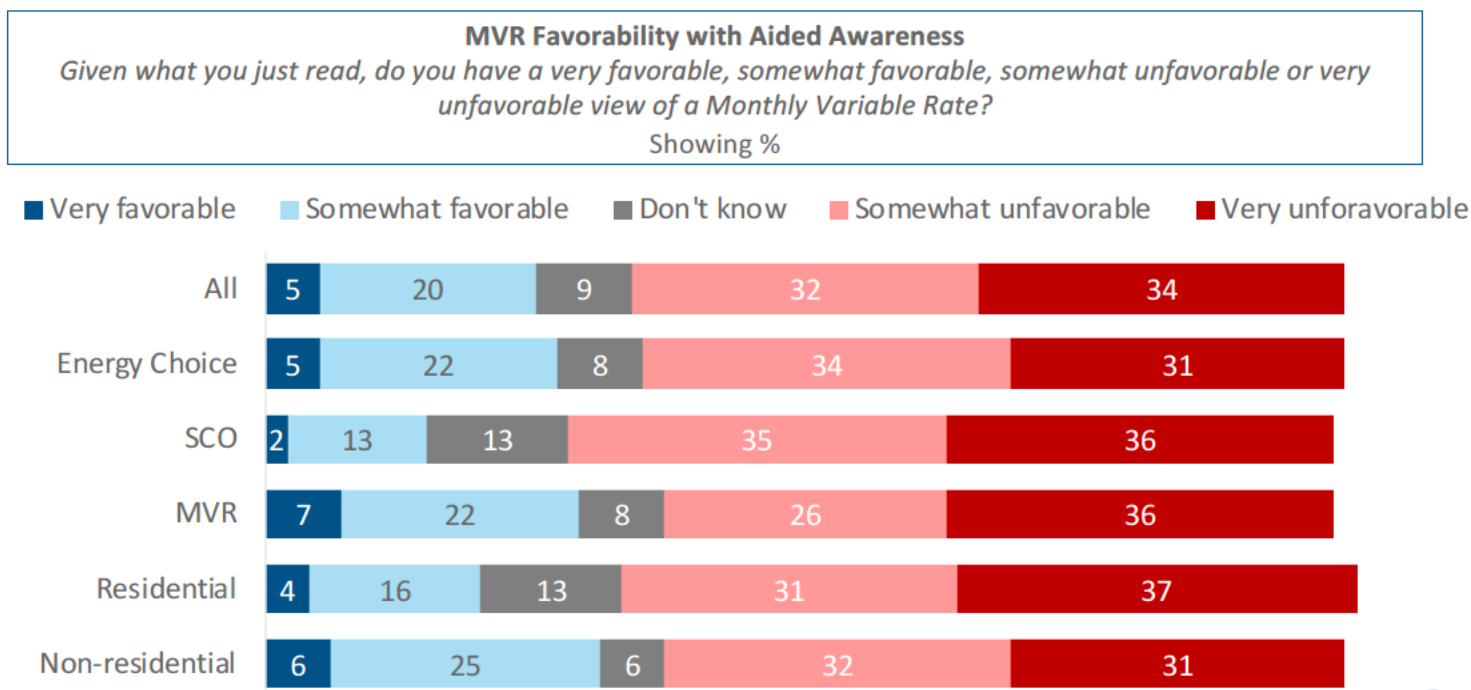
What do you see as the main disadvantages associated with being on the Standard Choice Offer?
Showing % Residential, ranked by "Paying the market rate for natural gas"



Most view the MVR as unfavorable, including MVR Customers

- Close to 3 in 4 SCO customers say that they view the Monthly Variable Rate as unfavorable

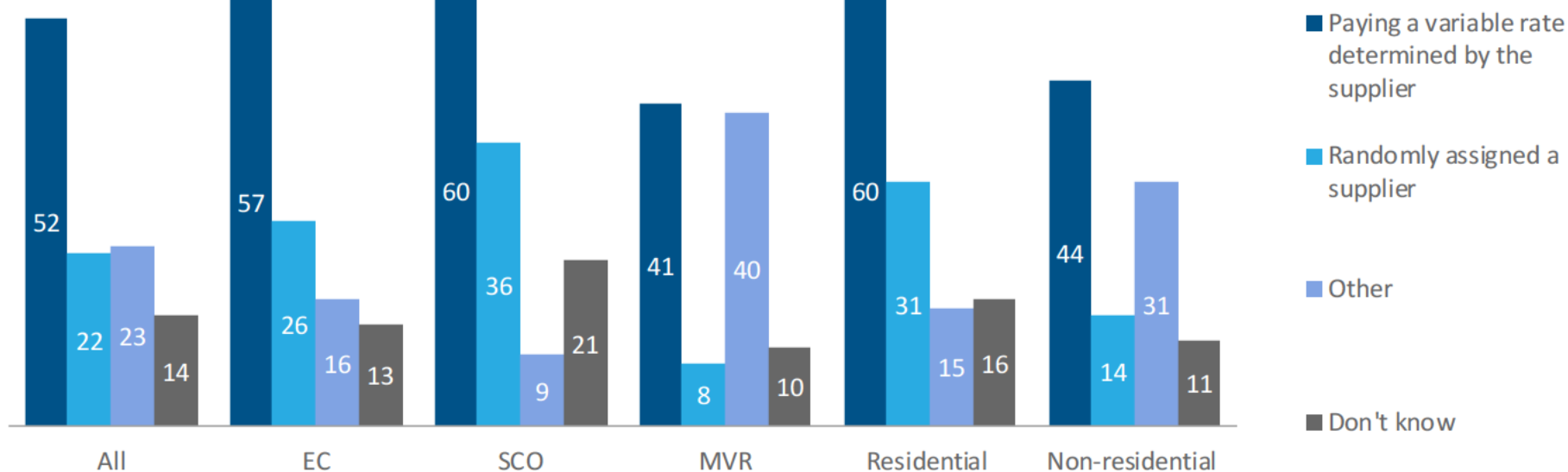
RESPONDENTS HEARD OR READ: Customers whose contracts have expired are placed on a Monthly Variable Rate. Customers on the Monthly Variable Rate are randomly assigned a natural gas supplier and charged at that supplier's chosen monthly variable rate.



Most see paying a variable rate determined by the supplier as the main disadvantage of MVR

DISADVANTAGES OF MVR

What do you see as the main disadvantages associated with being on a Monthly Variable Rate?
Showing %, ranked by All





THE APPLES TO APPLES SITE IS AN EXCELLENT TOOL
FOR HELPING CUSTOMERS MAKE EASY DECISIONS.

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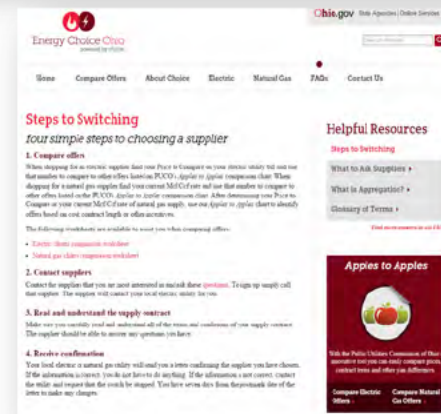
Respondents saw the following screenshots from the PUCO “Apples to Apples” Website



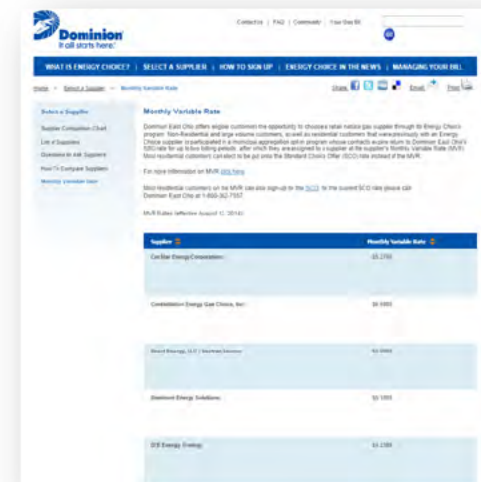
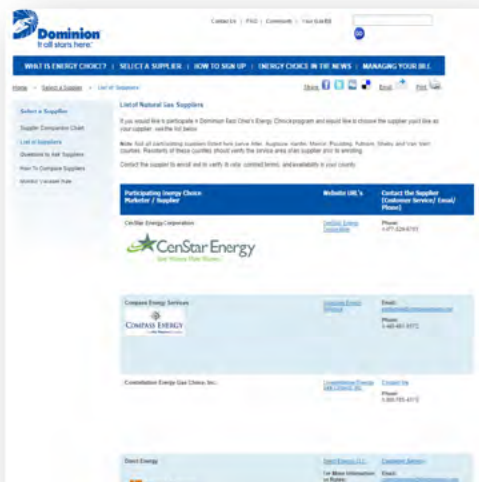
Search

Domestic East Ohio - Residential

Supplier	Rate Type	Term Length	Early Termination Fee	Monthly Fee	Supplier Offer
Yohannes Energy Services Inc 7900 Woodbridge Drive Piquette, OH 45357 (937) 527-8774 Term of Supplier See Site	Variable	1 mo	0	0	0
Direct Energy Services LLC PO Box 120 Troy, OH 45326 (937) 354-0999 Term of Supplier See Site	Variable	1 mo	0	0	0
Direct Energy Services LLC PO Box 120 Troy, OH 45326 (937) 354-0999 Term of Supplier See Site	Fixed	12 mo	0	0	0
DOMINION ENERGY SERVICES 1427 Tanglewood Buckeye, OH 43205 (614) 891-4000 Term of Supplier See Site	Fixed	12 mo	0	0	0
Direct Energy Services LLC PO Box 120 Troy, OH 45326 (937) 354-0999 Term of Supplier See Site	Fixed	12 mo	0	0	0



Respondents saw the following screenshots from the Dominion East Ohio "Energy Choice" Website



Customers think that the “Apples to Apples” site is easy to use and like the comparison tool

- As we found in the focus groups, customers find the “Apples to Apples” site easy to use and like the comparison tool

FEATURES THAT STOOD OUT FROM SCREENSHOTS OF “APPLES TO APPLES” SITE

What did you like best about what you just saw?

Showing %

RESIDENTIAL SCO



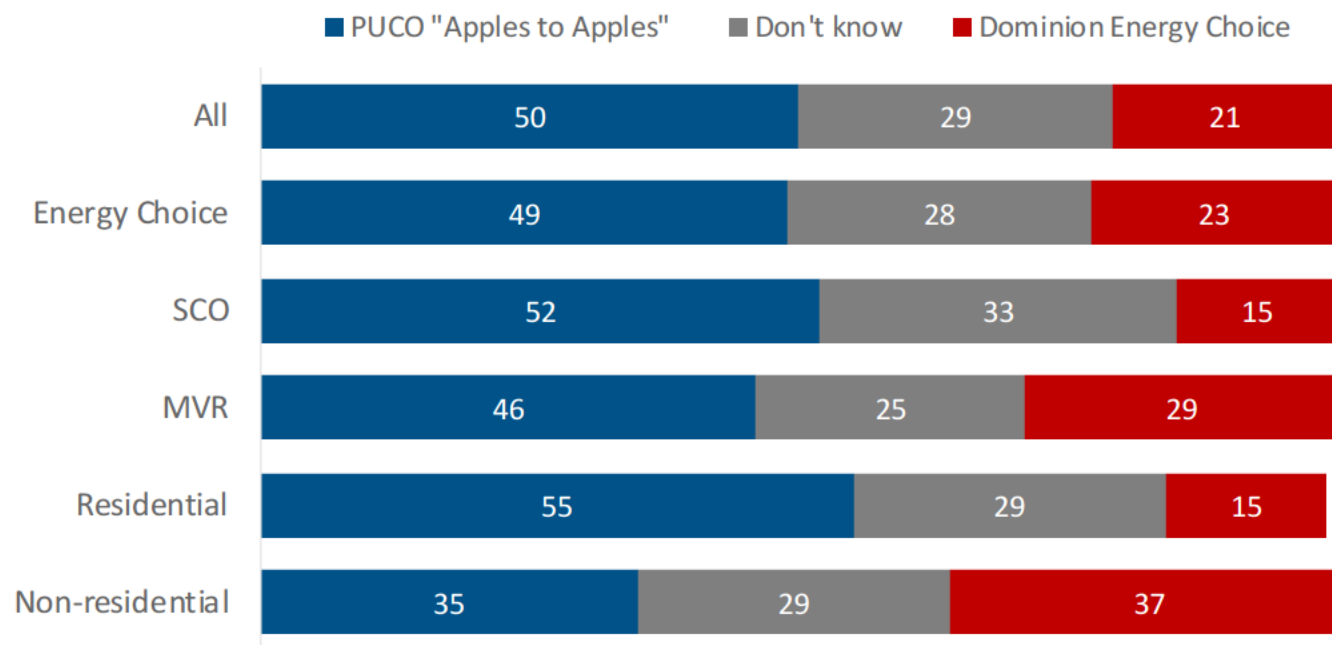
RESIDENTIAL ENERGY CHOICE



Most say that they would choose to use the “Apples to Apples” site when selecting a supplier

- Close to 3 in 10 across audiences aren’t sure if they would use the Apples to Apples site or the Dominion East Ohio Energy Choice website when selecting a supplier

PUCO “APPLES TO APPLES” V. DOMINION ENERGY CHOICE
If you had to choose to use the Dominion East Ohio Energy Choice website or the PUCO “Apples to Apples” website when choosing a supplier, which would you choose?
Showing %
(All [N=463], Energy Choice [N=233], SCO [N=162], MVR [N=68], Residential [N=337], Non-residential [N=126])



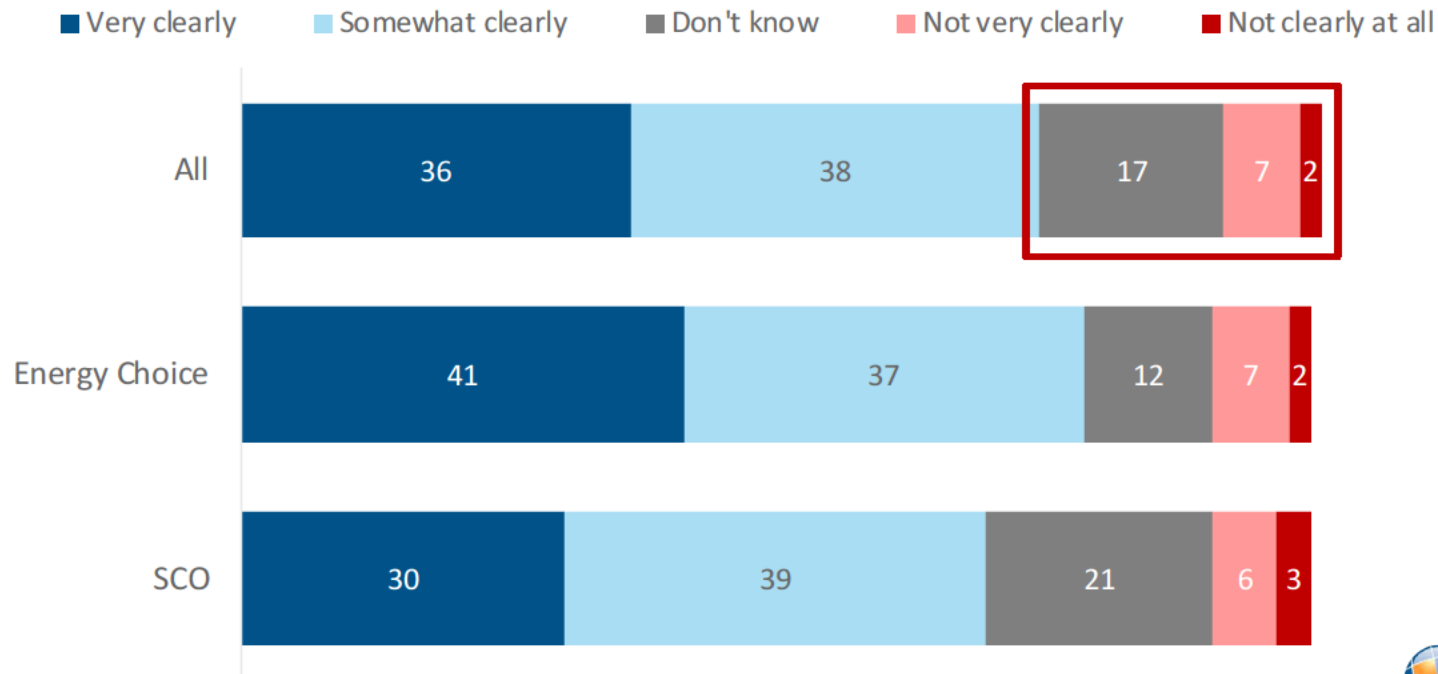
There is significant uncertainty about whether the PUCO site explains Dominion East Ohio rate plans clearly

- SCO customers are most likely to say that they weren't sure or did not think that the Apples to Apples site explained the various rate plan options clearly

"APPLES TO APPLES" EXPLANATION OF PLAN TYPES

Given what you just saw and read, how clearly does the "Apples to Apples" website explain the various rate plan options (Energy Choice, Standard Choice Offer, Monthly Variable Rate) offered by Dominion East Ohio?

Showing % Residential



Recommendations

- Re-introduce customers to their rate plan through direct mail or e-mail.
- In all communications, provide clear, concise, plain-language descriptions of each rate plan option available to them, split by residential and non-residential customers.
- Pinpoint messages and themes that highlight how choosing a supplier is easy, fast, and can save customers' money.
- Consider updating the front end of the PUCO "Apples to Apples" website to include a comprehensive list of rate plan options available to Dominion customers, with concise, plain-language descriptions of each type of rate plan, split by residential and non-residential customers.



Appendix

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Customer Service Landscape

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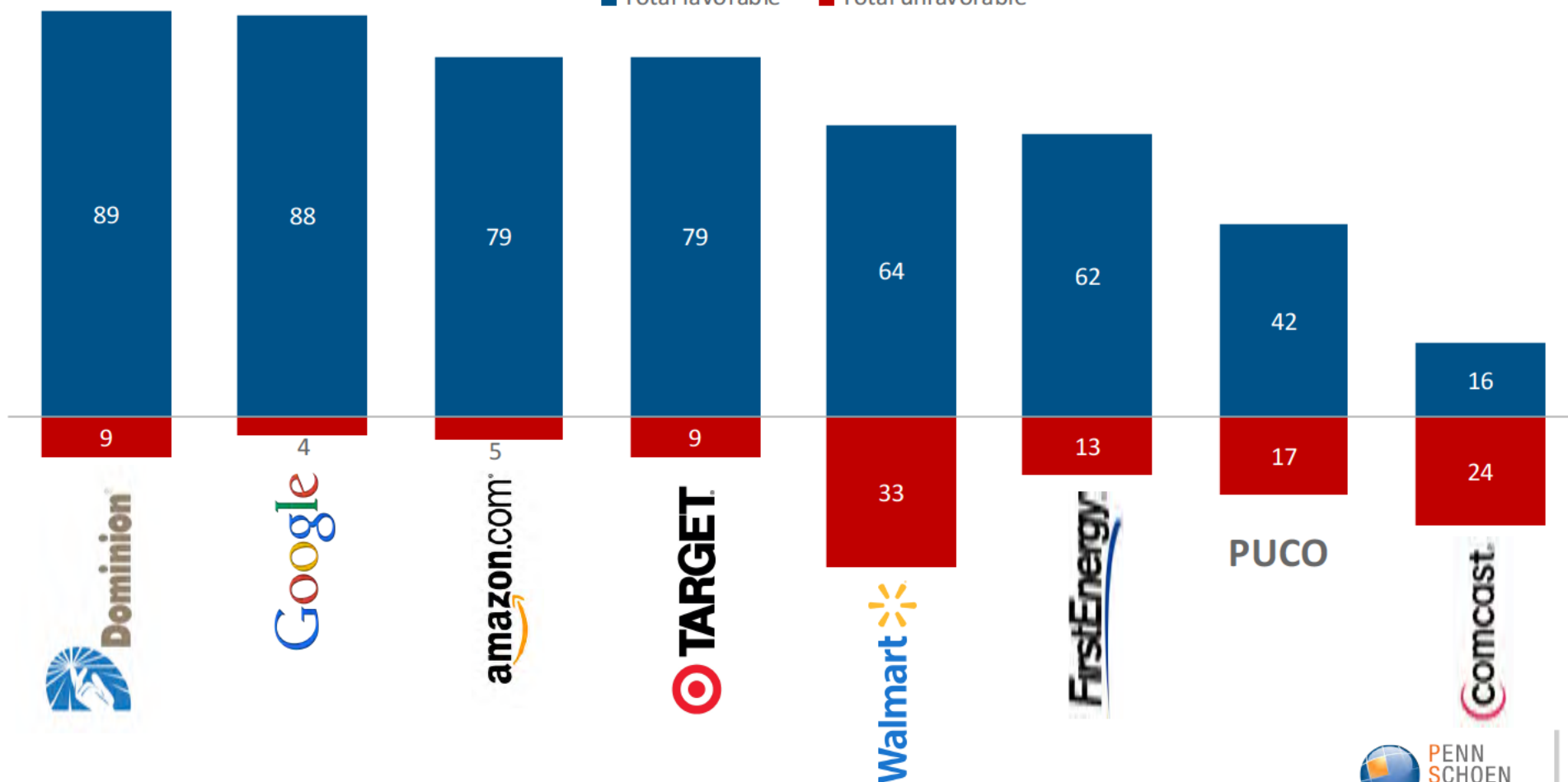
Dominion is regarded highly as compared to other organizations in the region

FAVORABILITY COMPARED TO OTHERS

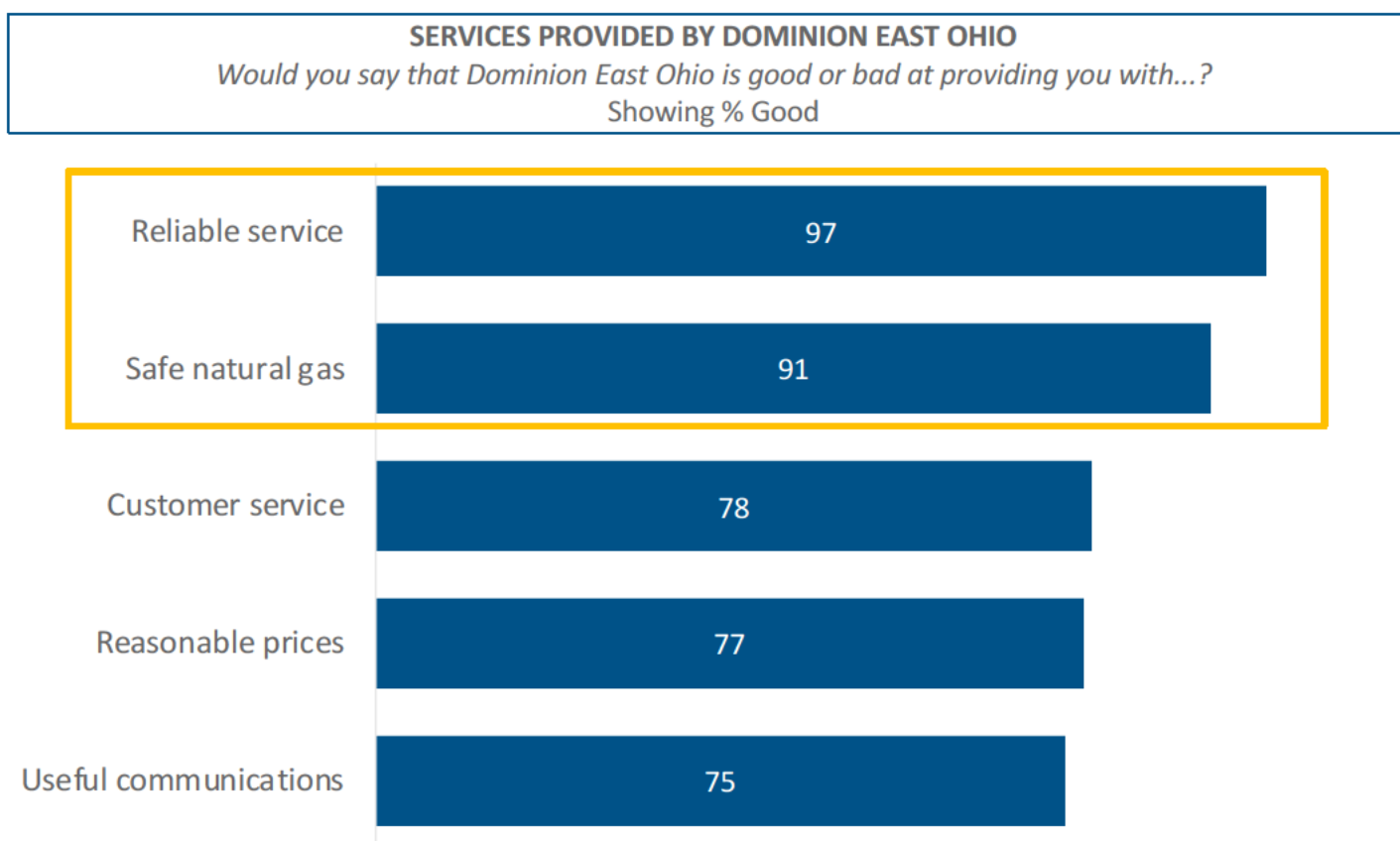
Do you have a very favorable, somewhat favorable, neither favorable nor unfavorable, somewhat unfavorable or very unfavorable view of...?

Showing % All

■ Total favorable ■ Total unfavorable



At least 9 in 10 customers say that they think Dominion East Ohio is good at providing reliable service and safe natural gas

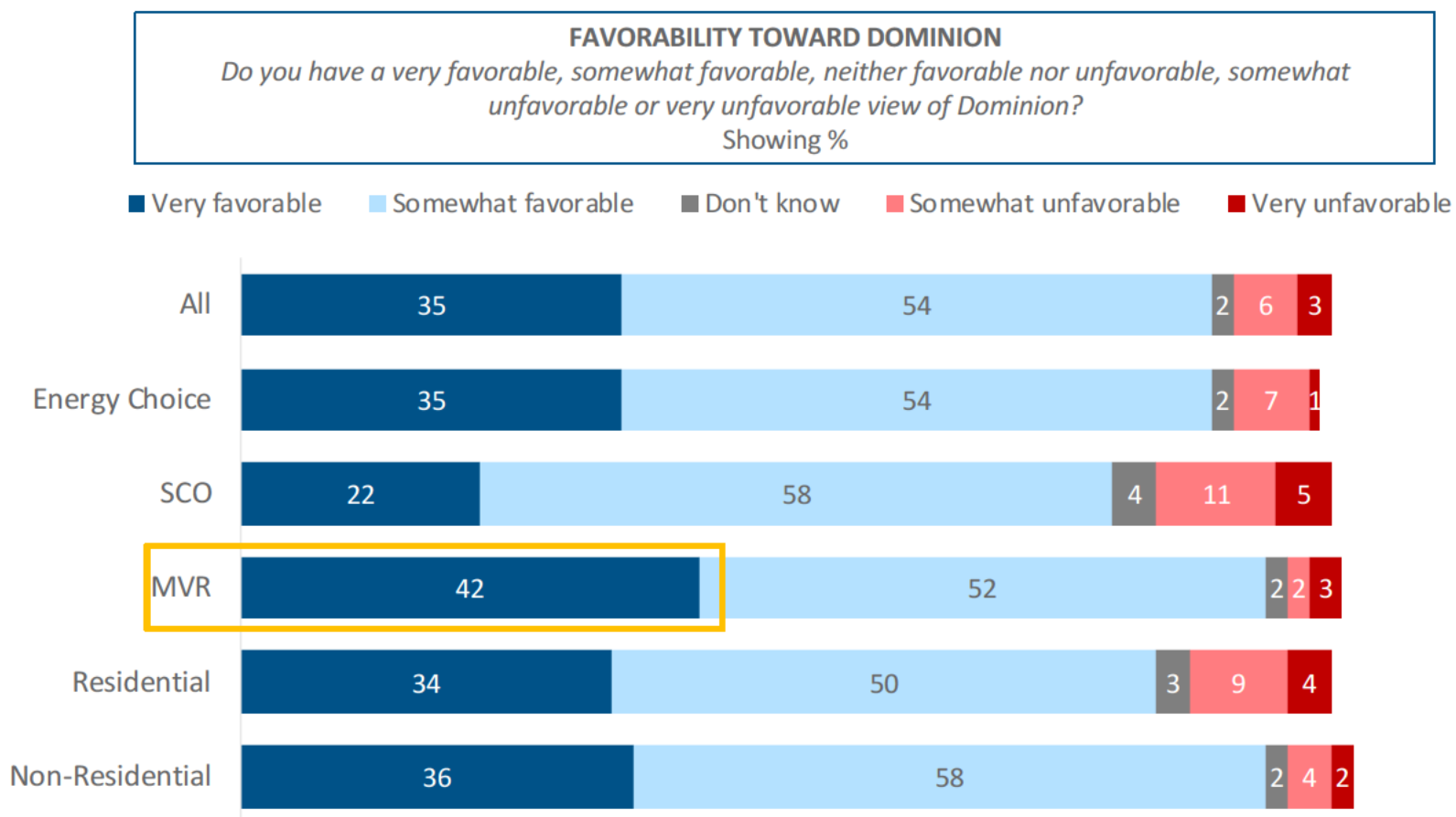


Most say that Dominion East Ohio is good at providing reliable service and safe natural gas

Would you say that Dominion East Ohio is good or bad at providing you with...? Showing % Good/Bad/Don't know	All	Energy Choice	SCO	MVR	Res	Non-res
Reliable service	97/1/1	98/1/1	95/3/1	97/1/1	97/1/1	98/1/1
Safe natural gas	91/3/7	93/1/6	88/3/9	89/3/8	90/2/8	91/3/6
Customer service	78/10/12	79/9/12	68/13/19	81/11/8	75/9/16	81/12/8
Reasonable prices	77/19/4	77/19/4	72/24/4	80/15/5	74/23/4	80/14/5
Useful communications	75/12/12	77/9/13	72/15/13	74/14/11	76/11/14	75/14/11

MVR customers are the most favorable toward Dominion

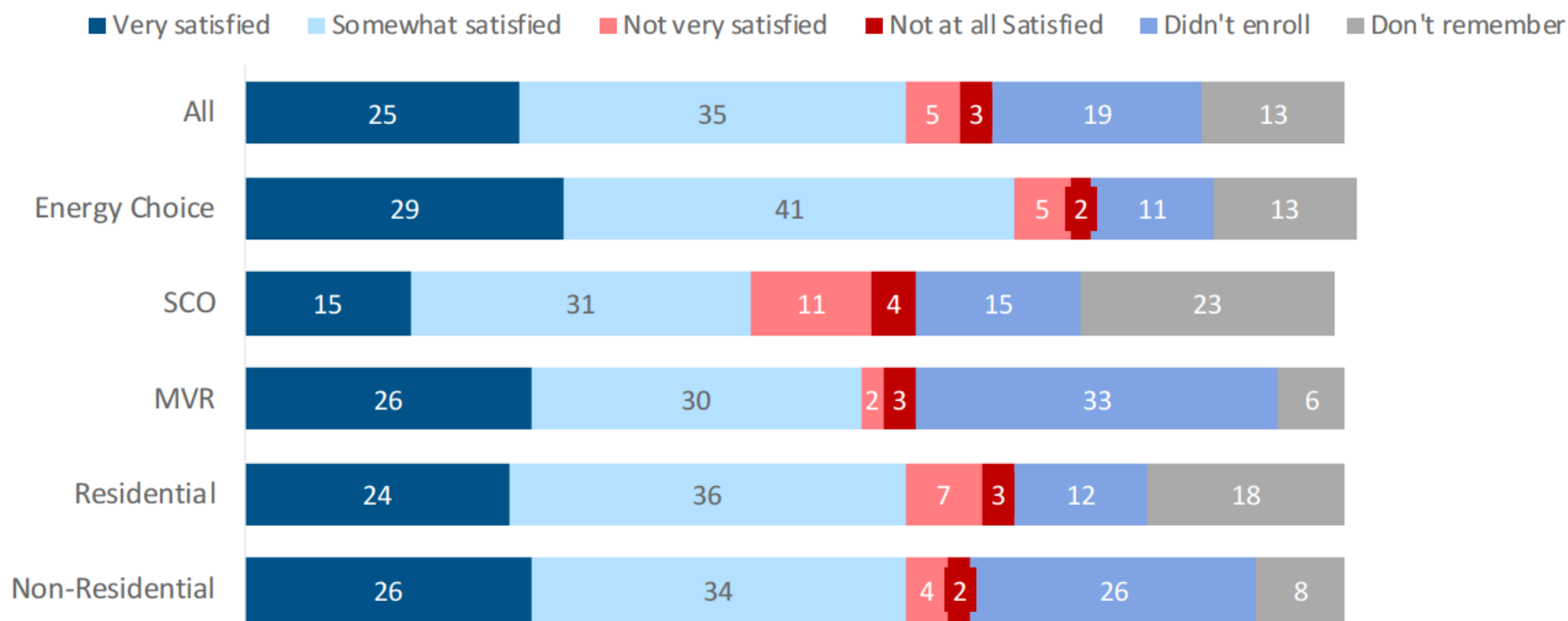
- 2 in 5 MVR customers say that they have a 'Very favorable' view of Dominion



The majority, excluding SCO customers, say that they remember being satisfied with their natural gas rate plan enrollment process

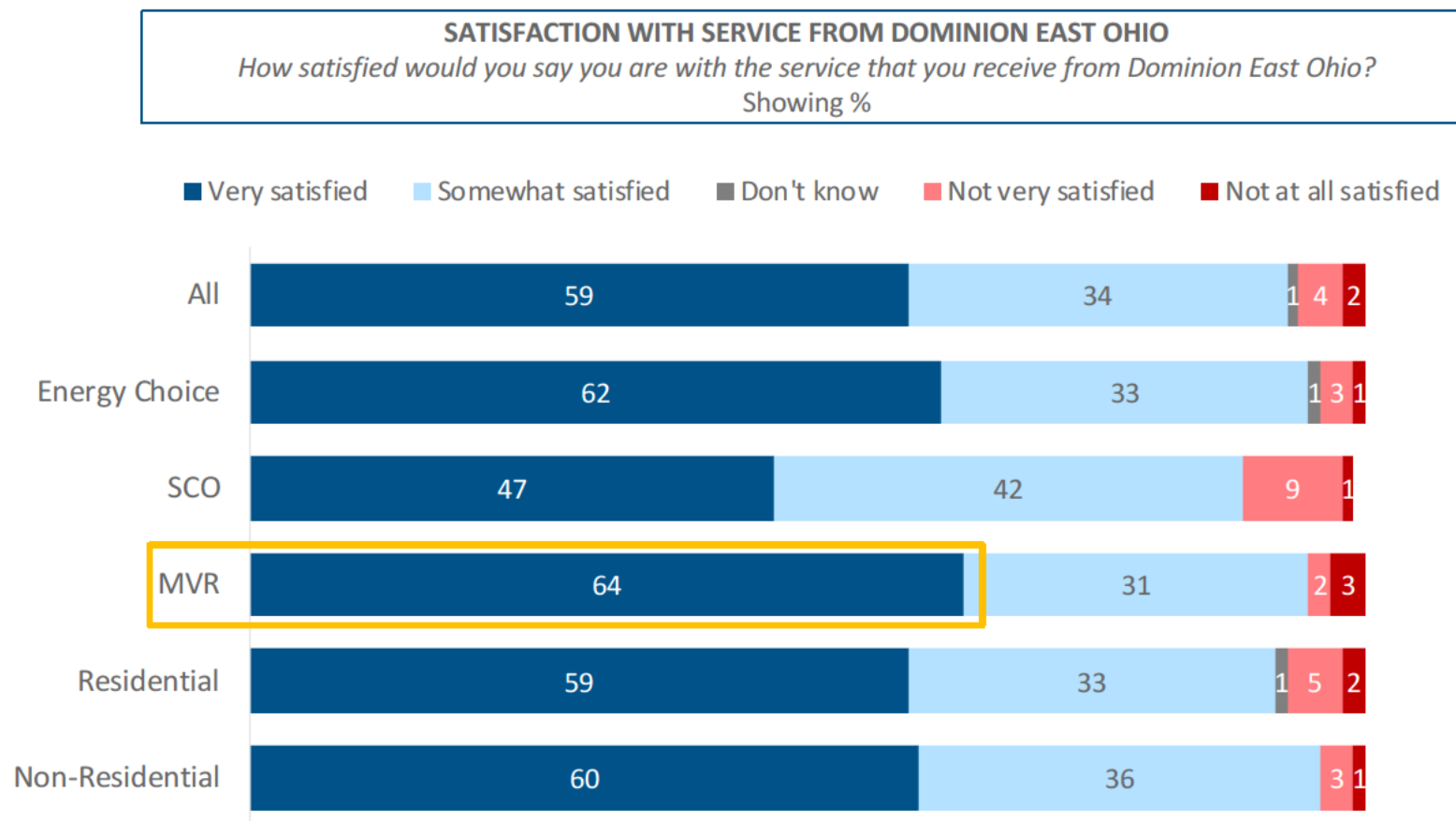
SATISFACTION WITH ENROLLMENT PROCESS

Given what you can remember, how satisfied were you with your natural gas rate plan enrollment process?
Showing %



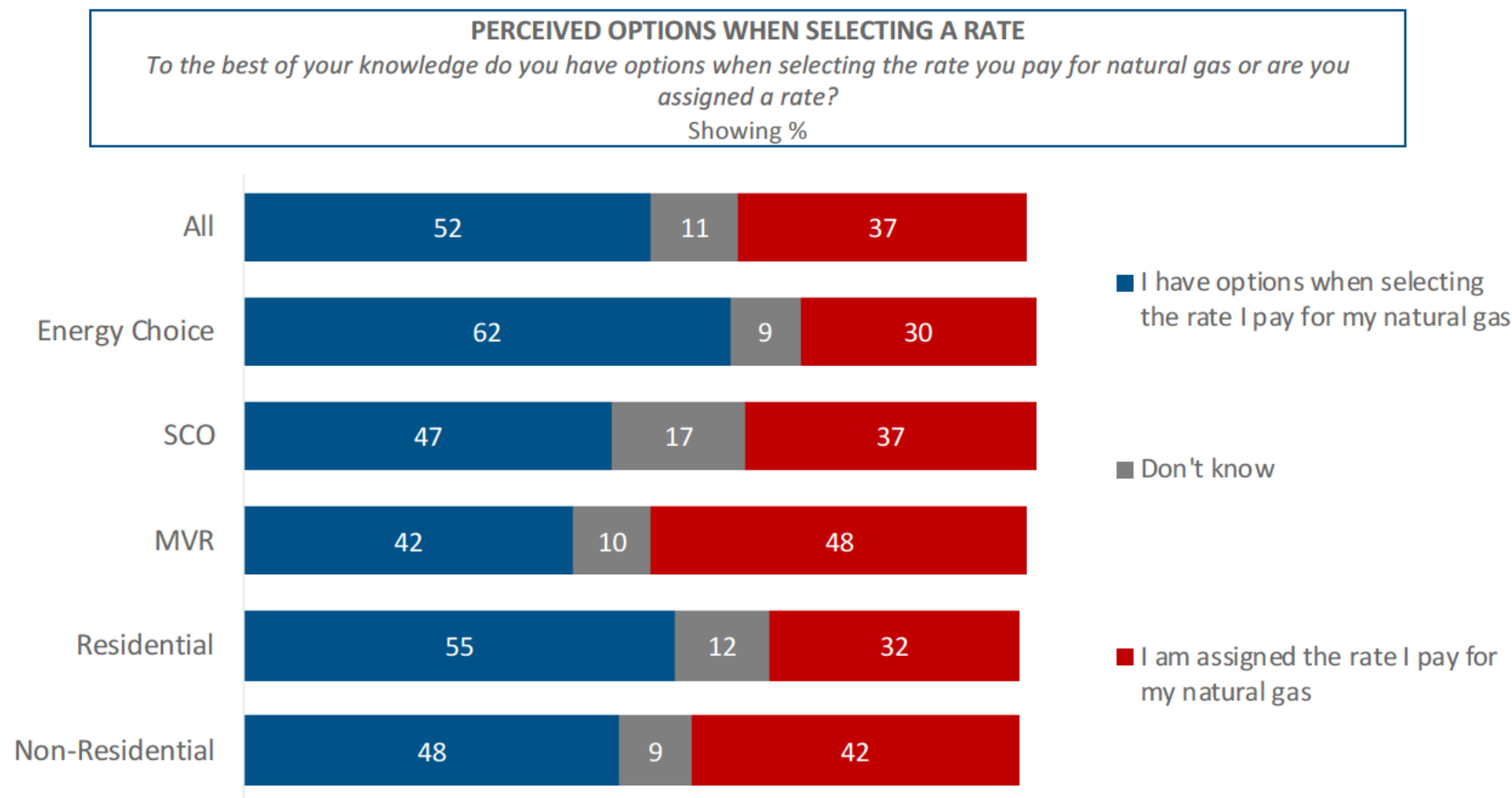
Non-residential customers are the most satisfied with the service they receive from DEO, but all are generally satisfied

- Close to 2 in 3 MVR customers say that they are “Very satisfied” with the service that they receive from Dominion



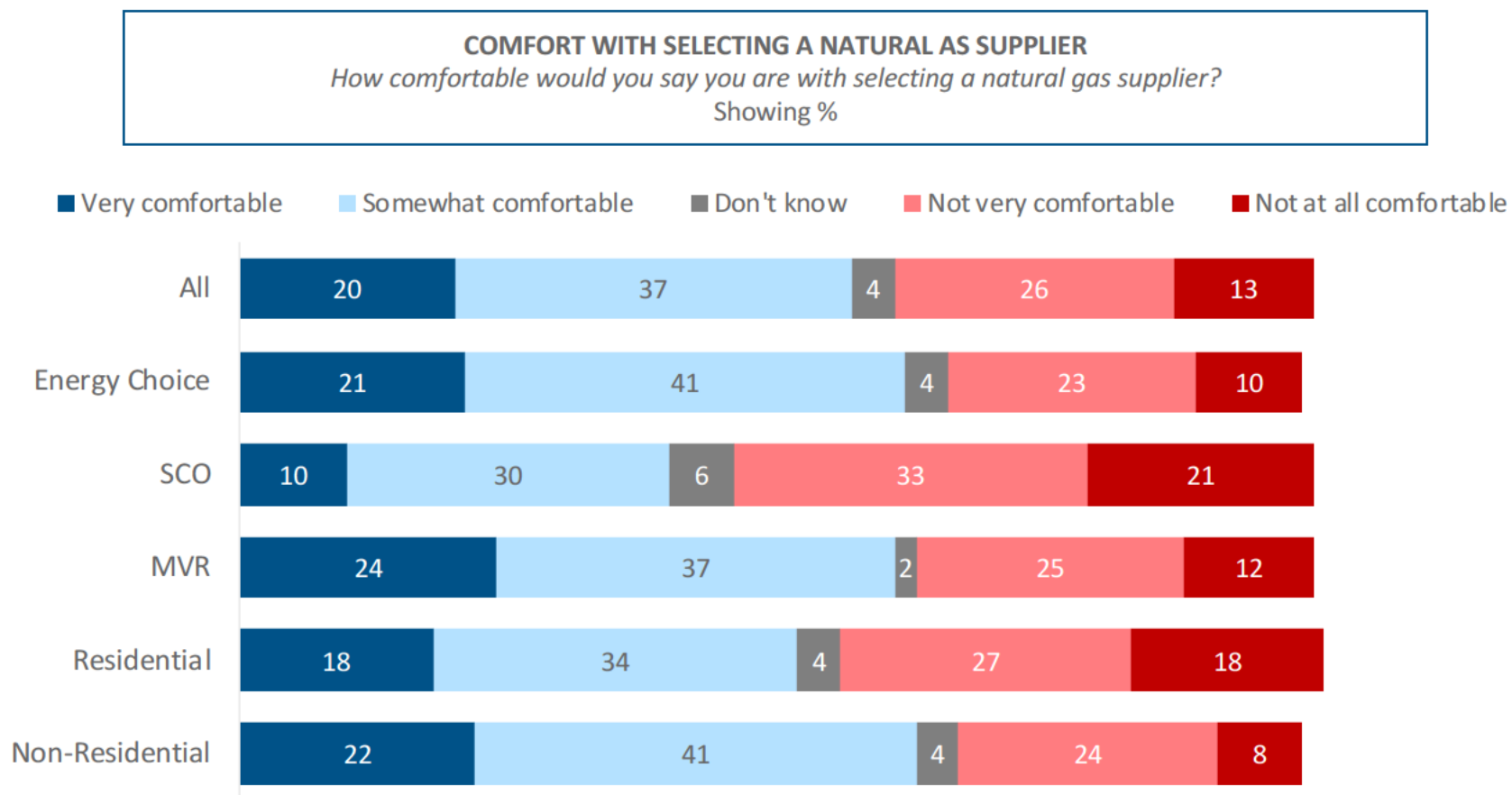
Almost a third of Energy Choice customers think that they are assigned the rate they pay for natural gas

- Close to half of SCO customers think that they retain the option to select the rate they pay for natural gas



Customers are split on how comfortable they are with selecting a supplier

- SCO customers are the least likely to say that they are comfortable with selecting a natural gas supplier

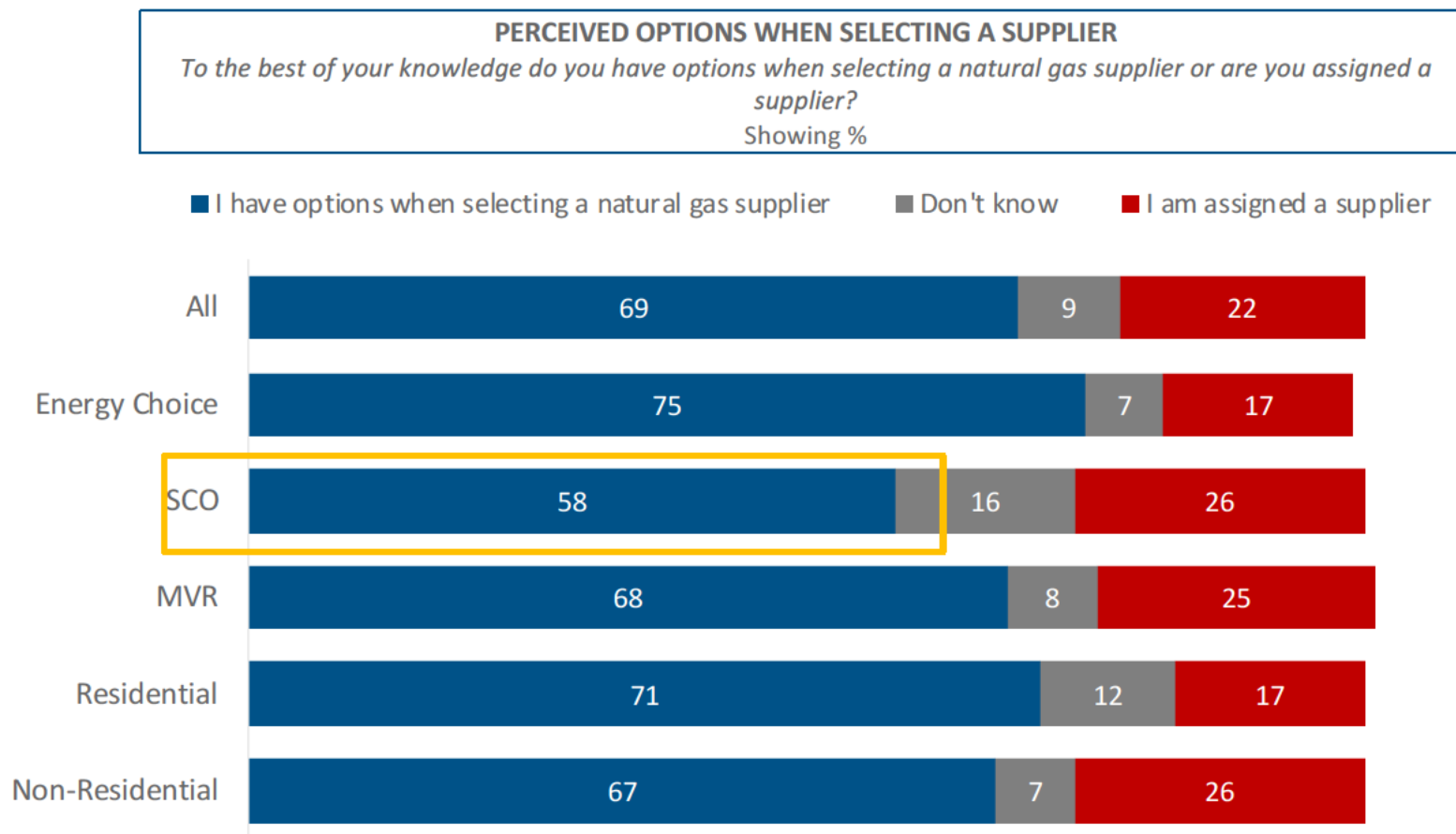


Most would feel more comfortable with selecting a supplier if they knew more about price and price stability

<i>What type of information or guidance would you need in order to feel comfortable with selecting a natural gas provider?</i> Showing %	All	Energy Choice	SCO	MVR	Res	Non-res
Price	64	66	75	56	67	61
Stability of price	53	59	72	34	67	39
Contract length	48	53	61	34	55	41
Presence of termination fees	41	41	55	33	46	36
Historical price data	34	31	50	27	40	27
Other	22	16	16	32	17	27
Don't know	7	6	4	10	7	8

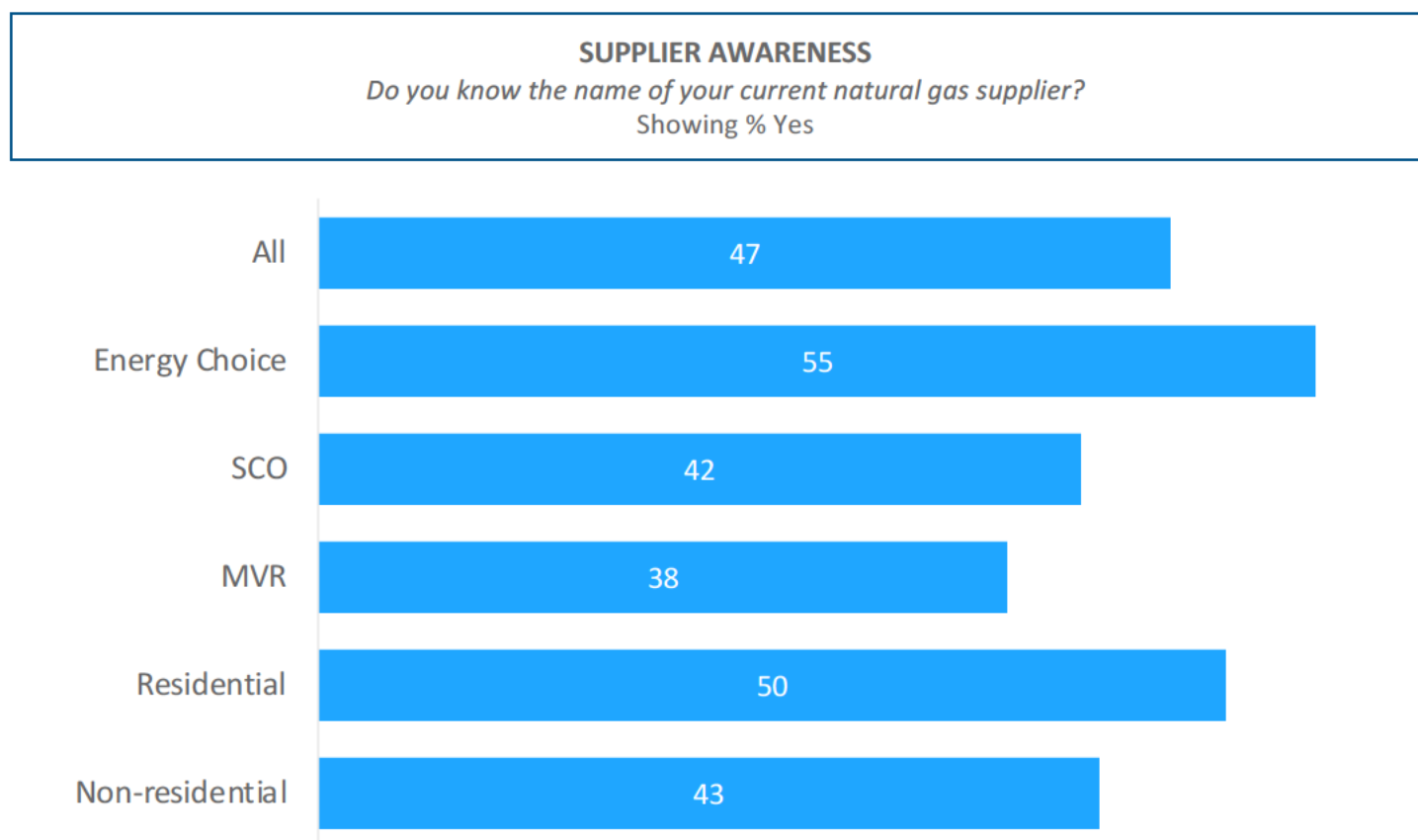
SCO customers are the least likely to think they have options when selecting a supplier

- Less than 3 in 5 SCO customers think that they have options when selecting a supplier



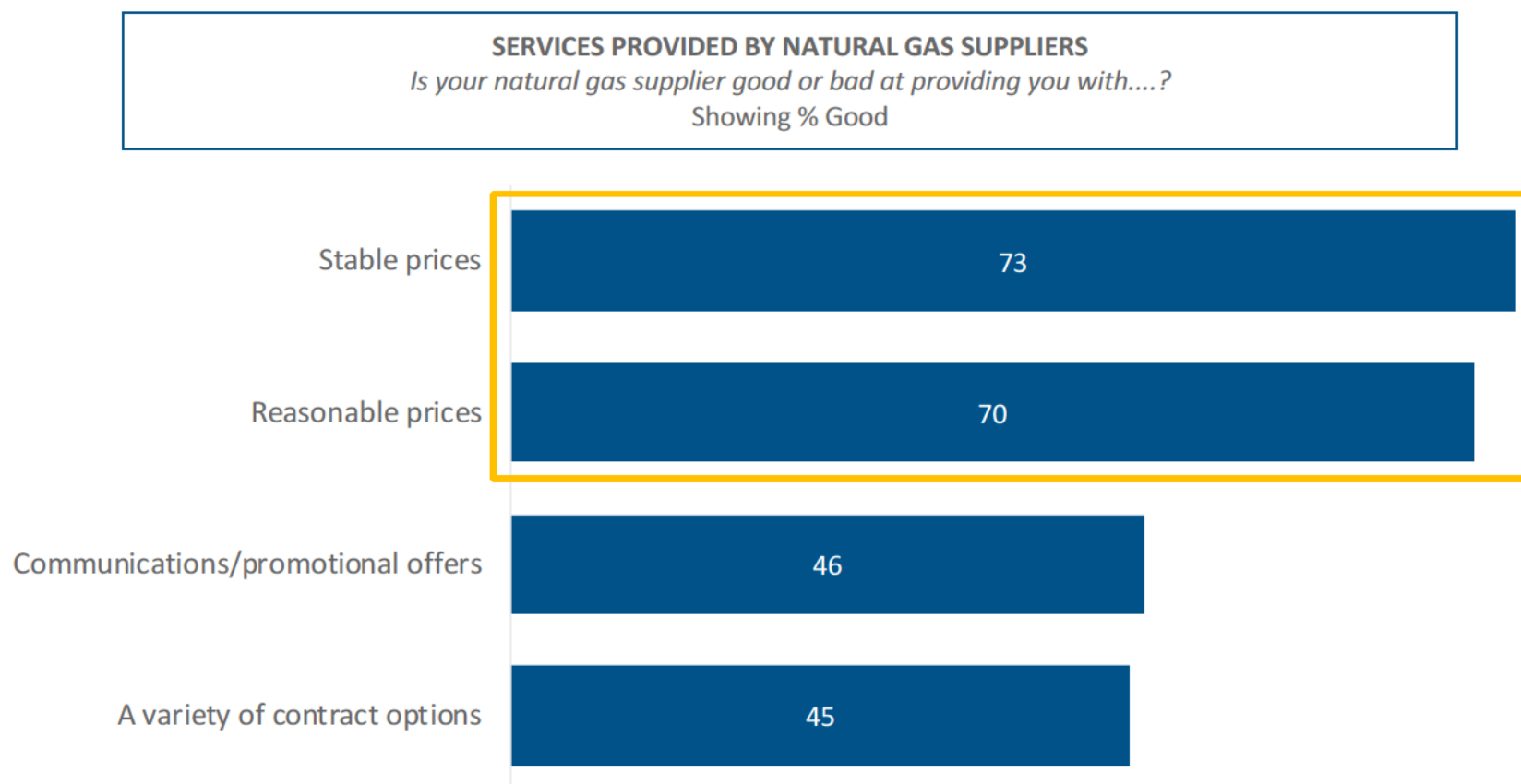
At least half of residential customers and more than half of Energy Choice customers know the name of their current natural gas supplier

- Residential and Energy Choice customers are the most likely to know the name of their supplier



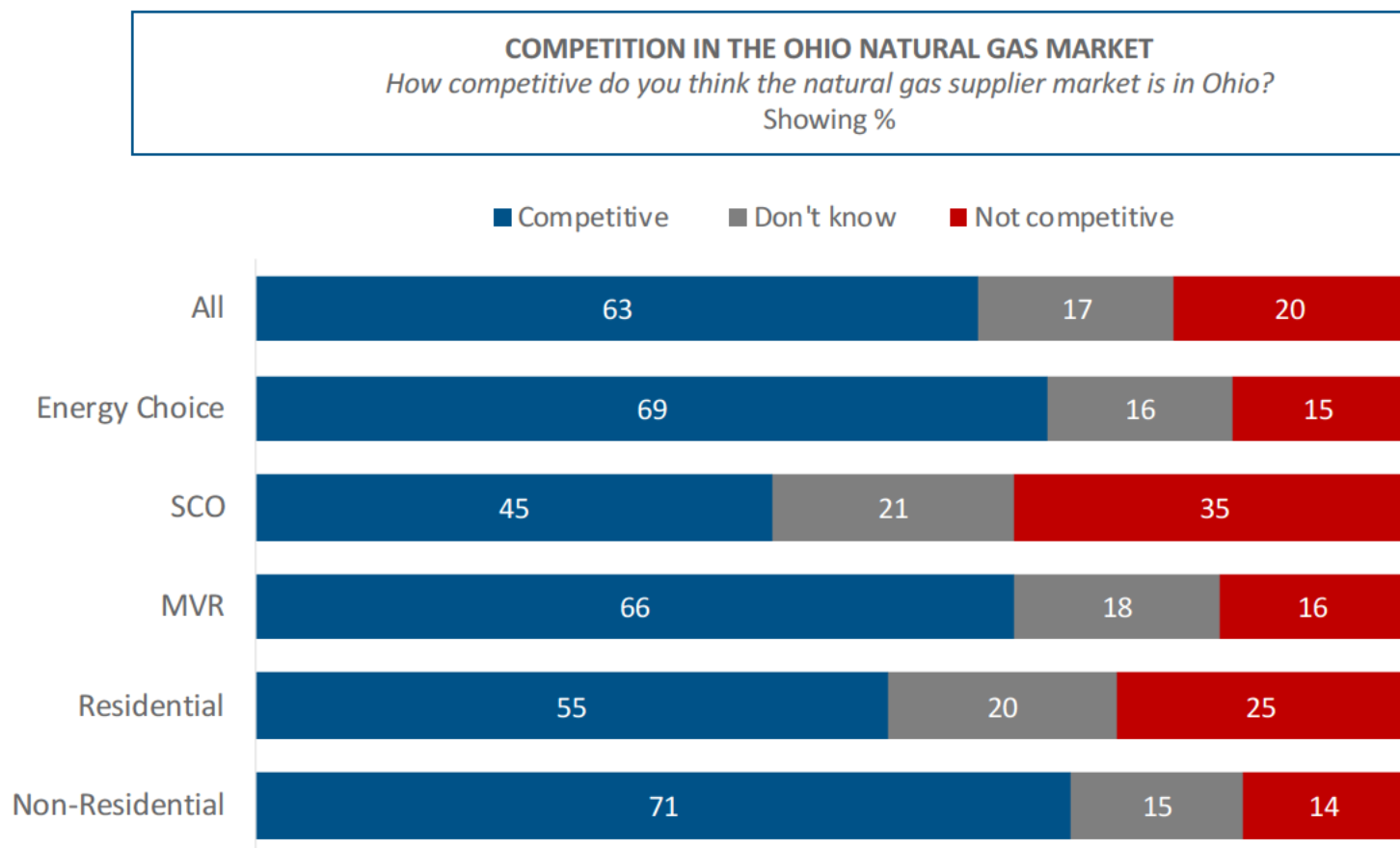
Most say their supplier is good at providing stable and reasonable prices

- More than 2 in 3 say that their natural gas supplier is either “Very good” or “Somewhat good” at providing them with stable and reasonable prices

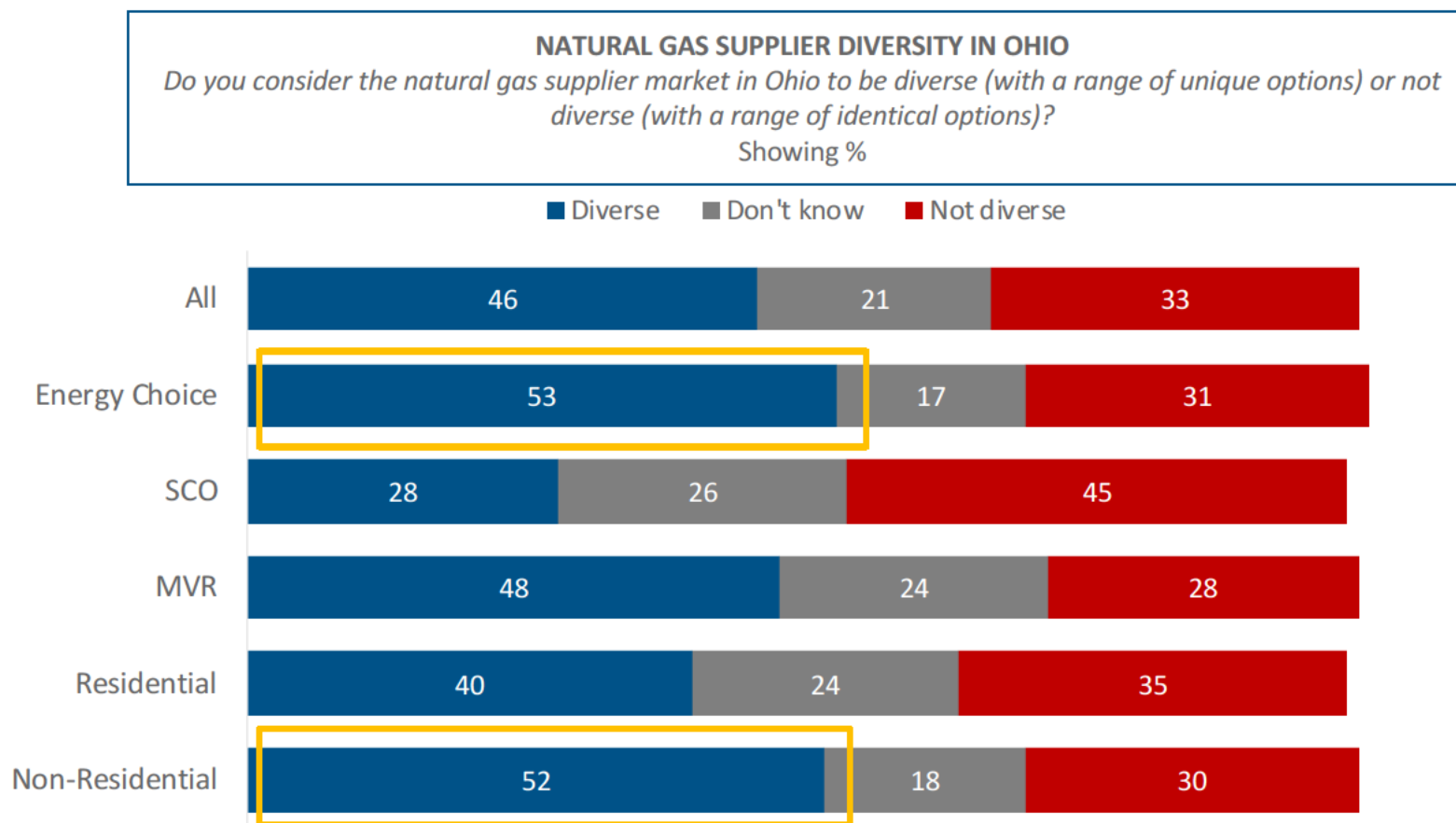


With the exception of SCO customers, most think that the market for natural gas in Ohio is competitive

- More than 1 in 3 SCO customers think that the natural gas market in Ohio is not competitive



More than half of Energy Choice and Non-residential customers say that they see the natural gas supplier market as diverse



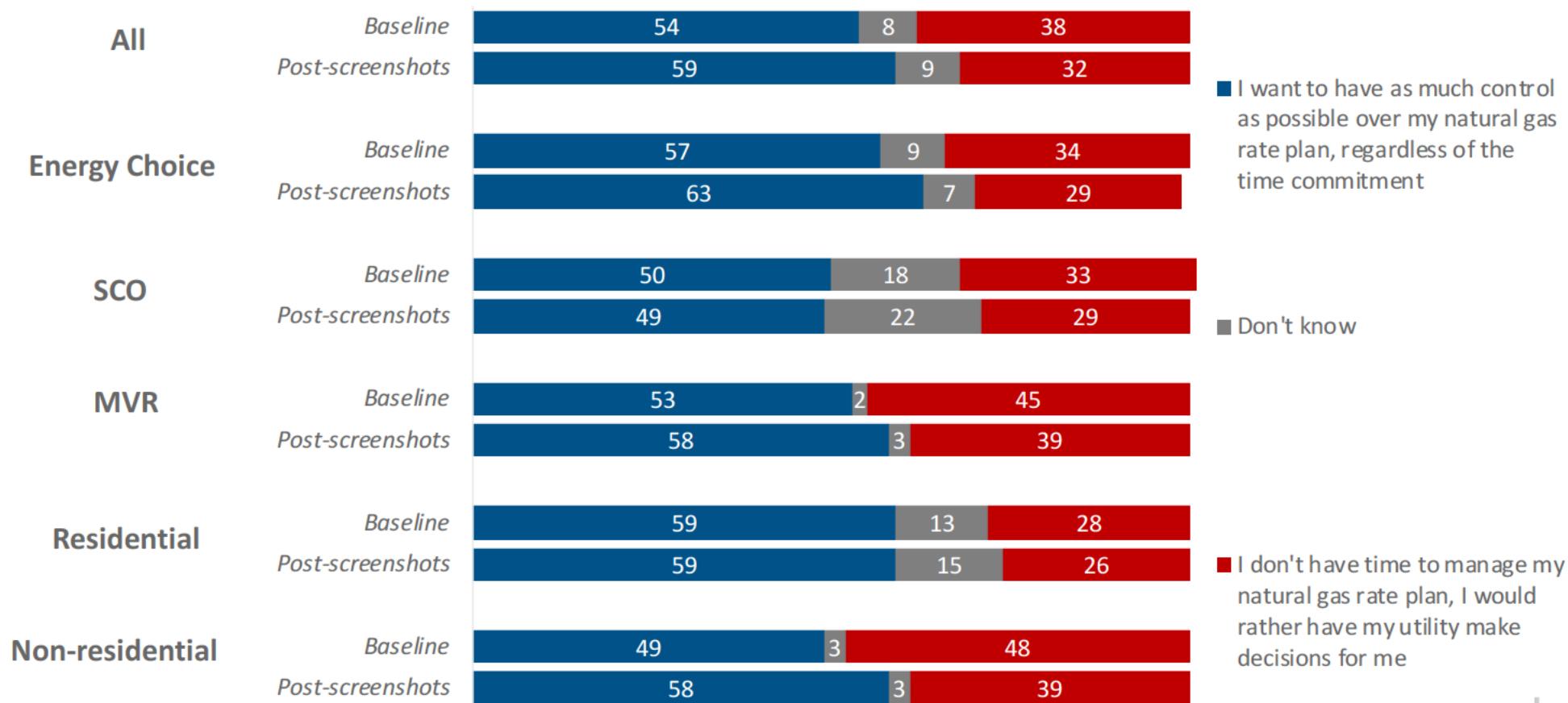
Most want to hear about natural gas suppliers through the mail or E-mail

How would you want to receive information or guidance on how to select a natural gas supplier? Showing %	Base	Residential	Non-Residential	Energy Choice	SCO	MVR
Direct mail	61	57	64	59	52	69
Email	48	55	40	52	61	34
Advertising	14	9	18	14	8	16
Phone call	7	6	8	4	4	11
Text message	3	3	2	2	4	3
Other	5	4	5	4	5	5
Don't know	2	3	2	2	5	1

Most would rather have control over their natural gas rate plan than save time

CONTROL OVER NATURAL GAS RATE PLAN V. LACK OF TIME TO MAKE UTILITY RELATED DECISIONS

Which of the following is closer to your view?
Showing %



Most think that Dominion East Ohio is both a natural gas supplier and distributor

- 3 in 5 of all say that they think Dominion East Ohio is both a natural gas supplier and distributor

Based on what you know, is Dominion East Ohio a natural gas supplier, a natural gas distributor or both? Showing %	All	Energy Choice	SCO	MVR	Res	Non-Res
Both a natural gas supplier and distributor	60	60	58	62	62	59
Natural gas distributor	21	23	15	21	14	27
Natural gas supplier	7	8	6	8	7	8
Don't know	11	9	21	9	17	6

Slightly less than half of customers know whether their municipality offers a purchase program

- More than 2 in 5 of all say that their municipality offers a purchase program and a similar proportion aren't sure

<i>To the best of your knowledge, does your city or municipality offer a natural gas purchase program to its residents and businesses?</i> Showing %	All	Energy Choice	SCO	MVR	Res	Non-Res
Yes	41	44	37	40	42	41
No	21	25	13	21	15	27
Don't know	38	31	50	39	44	32

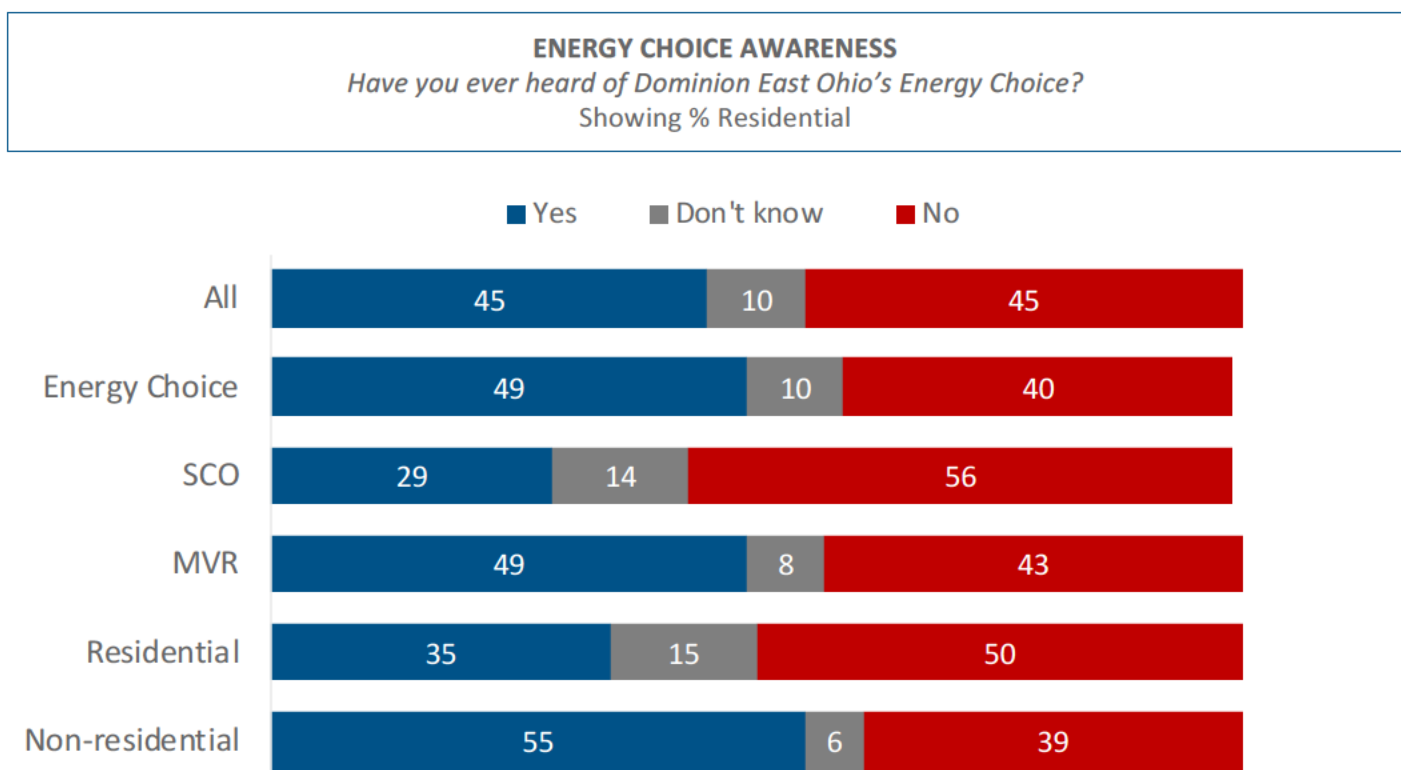


Energy Choice

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Awareness of Energy Choice is highest among MVR and Non-residential customers

- Only half of Energy Choice customers say that they have heard of Energy Choice



Most are favorable toward Energy Choice

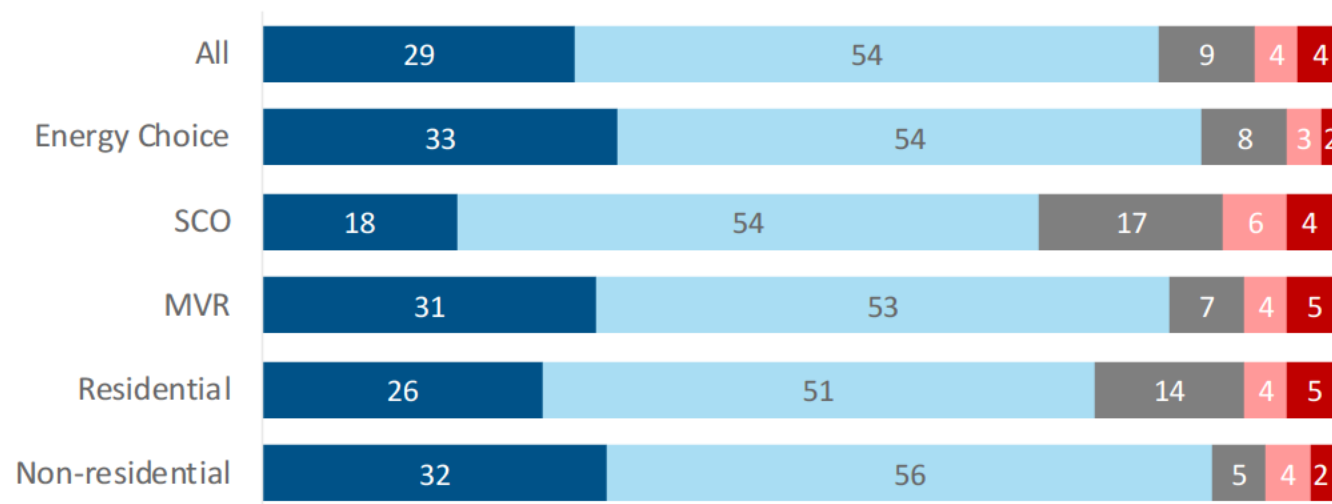
RESPONDENTS HEARD OR READ: Dominion East Ohio offers 'Energy Choice' which allows customers to select their own natural gas supplier and have Dominion East Ohio deliver the natural gas. Energy Choice customers select their own supplier and contract, which allows customers to choose based on rate cost, whether rates are fixed or variable, contract length, presence of termination fees and other factors. Energy Choice allows customers to select the supplier that meets their needs.

ENERGY CHOICE FAVORABILITY WITH AIDED AWARENESS

Given what you just read, do you have a very favorable, somewhat favorable, somewhat unfavorable or very unfavorable view of Dominion East Ohio's Energy Choice?

Showing %

■ Very favorable ■ Somewhat favorable ■ Don't know ■ Somewhat unfavorable ■ Very unfavorable

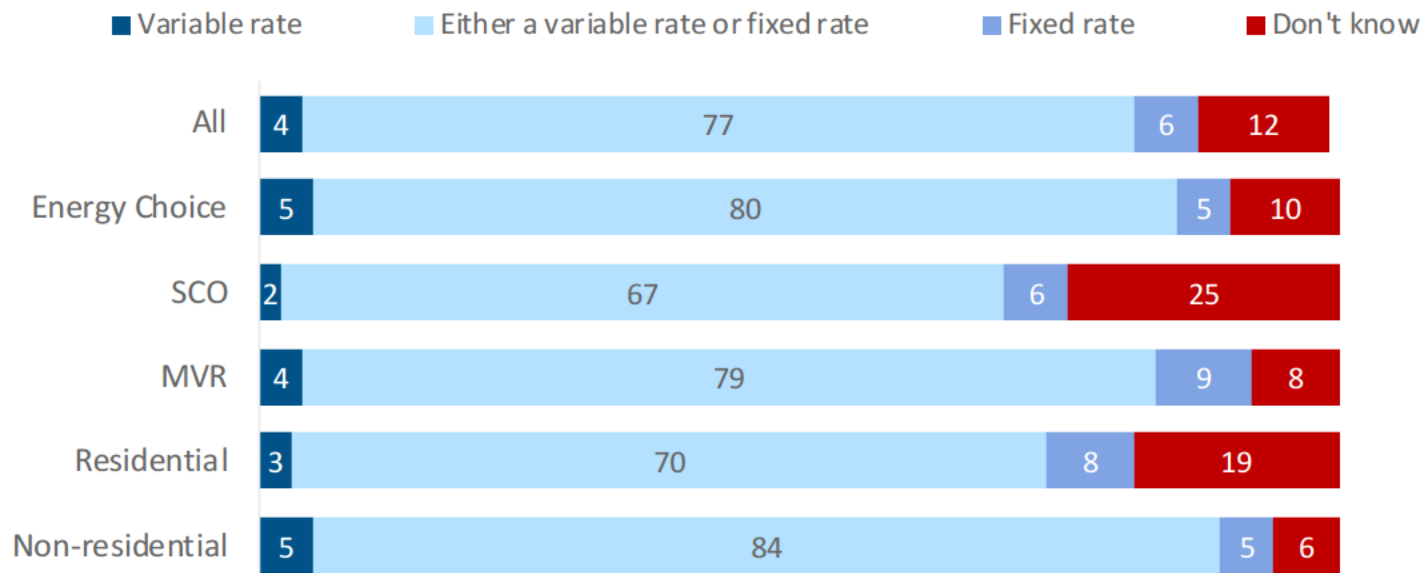


Most understand the specifics of Energy Choice after being prompted with an explanation

RESPONDENTS HEARD OR READ: Dominion East Ohio offers 'Energy Choice' which allows customers to select their own natural gas supplier and have Dominion East Ohio deliver the natural gas. Energy Choice customers select their own supplier and contract, which allows customers to choose based on rate cost, whether rates are fixed or variable, contract length, presence of termination fees and other factors. Energy Choice allows customers to select the supplier that meets their needs.

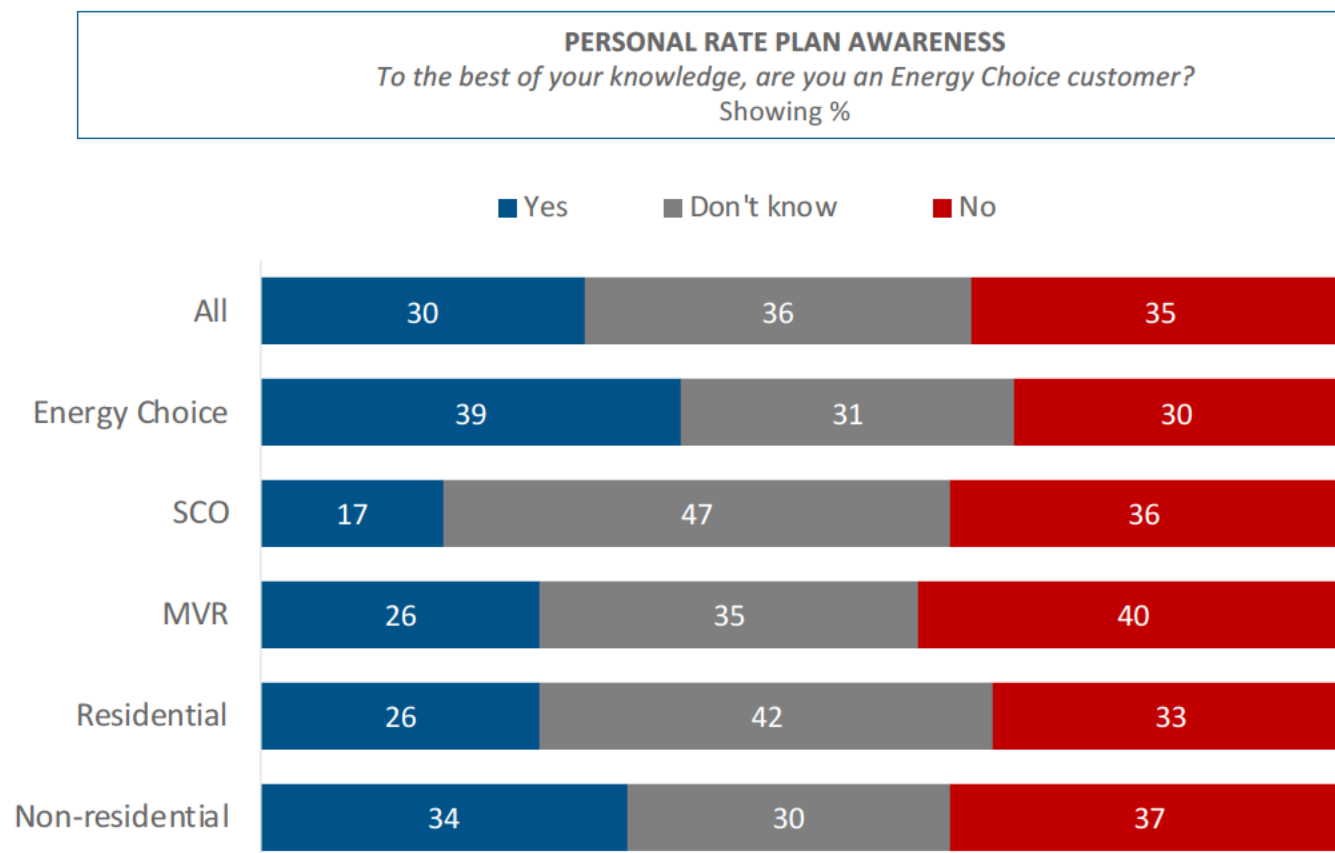
ENERGY CHOICE AWARENESS

Given what you just read, can Energy Choice customers choose a variable rate, a fixed rate or either type?
Showing % Residential



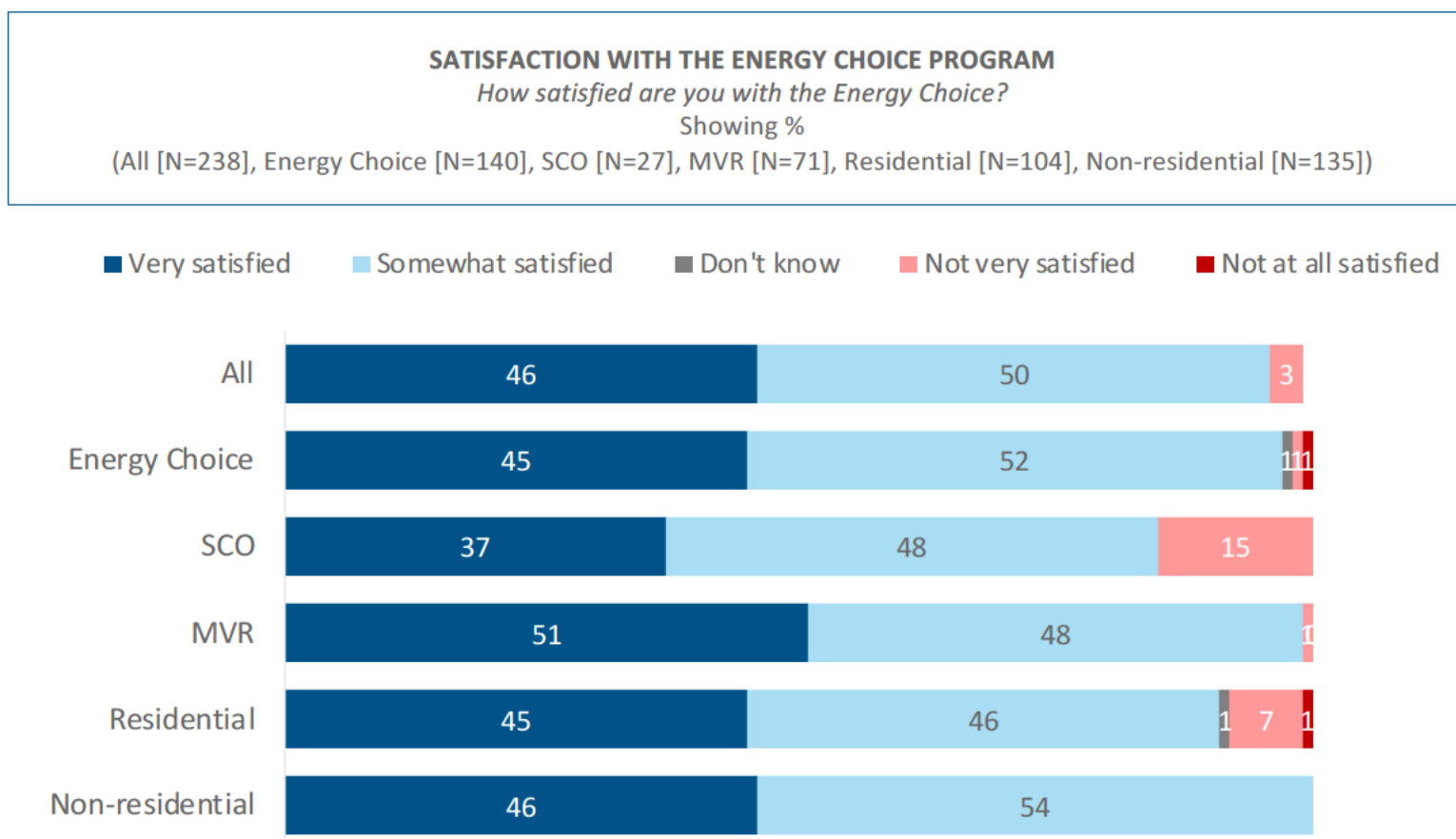
Most Energy Choice customers aren't aware that they are in the Energy Choice program

- More than 3 in 5 Energy Choice customers don't think that they are in the Energy Choice program



Most are satisfied with the Energy Choice program

- With the exception of SCO customers, close to half of all say that they are “Very satisfied” with Energy Choice

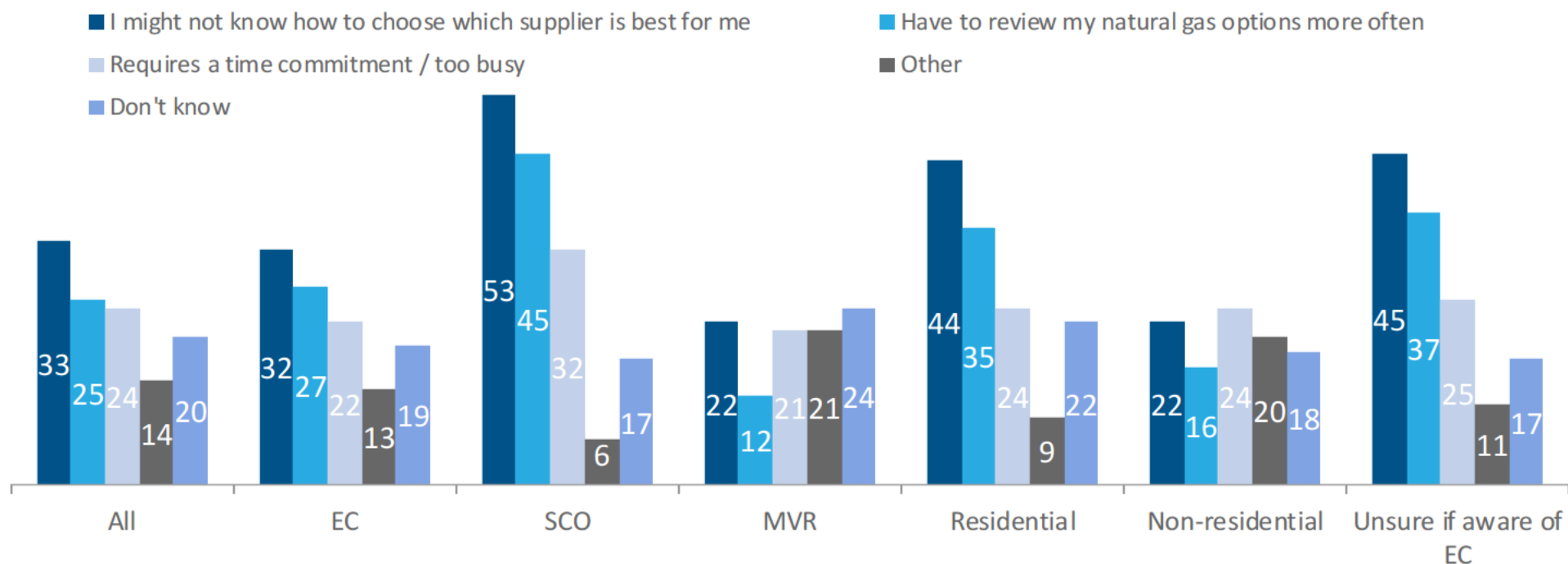


Most are concerned that they won't know how to choose the supplier that is best for them

- Over half of SCO customers and close to half of Residential customers think that the main disadvantage to Energy Choice is not knowing which supplier to choose

DRAWBACKS OF ENERGY CHOICE

What do you see as the main drawbacks associated with being in Energy Choice?
Showing % , ranked by All



Most think that Energy Choice could be improved

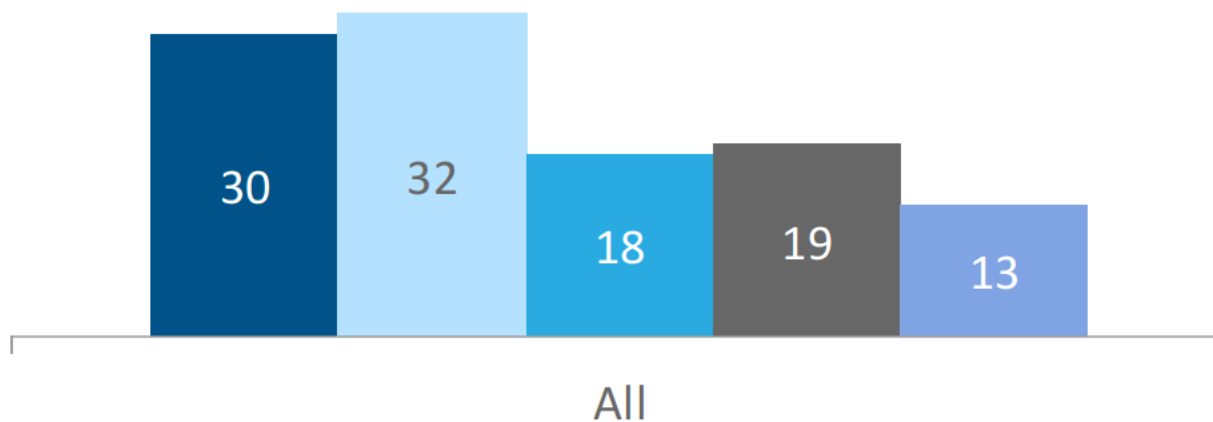
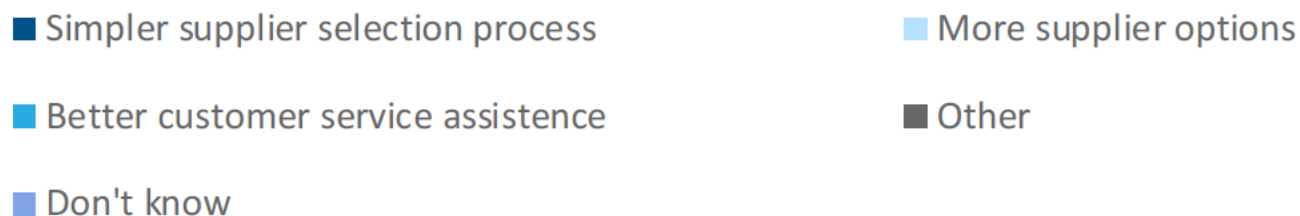
- 2 in 3 of all say that they think Energy Choice could be improved

<i>Do you think that Energy Choice has room for improvement?</i> Showing %	All [N=168]	Energy Choice [N=97]	SCO [N=27]	MVR [N=44]	Res [N=104]	Non-res [N=64]
Yes	71	69	63	79	59	81
No	10	11	7	10	10	10
Don't know	19	21	30	11	32	9

A simplified selection process and more supplier options are seen as top improvements to Energy Choice

- Around 3 in 10 of all say that Energy Choice can be improved by simplifying the supplier selection process or offering more supplier options

HOW ENERGY CHOICE CAN BE IMPROVED
How do you think Energy Choice could be improved?
Showing % All



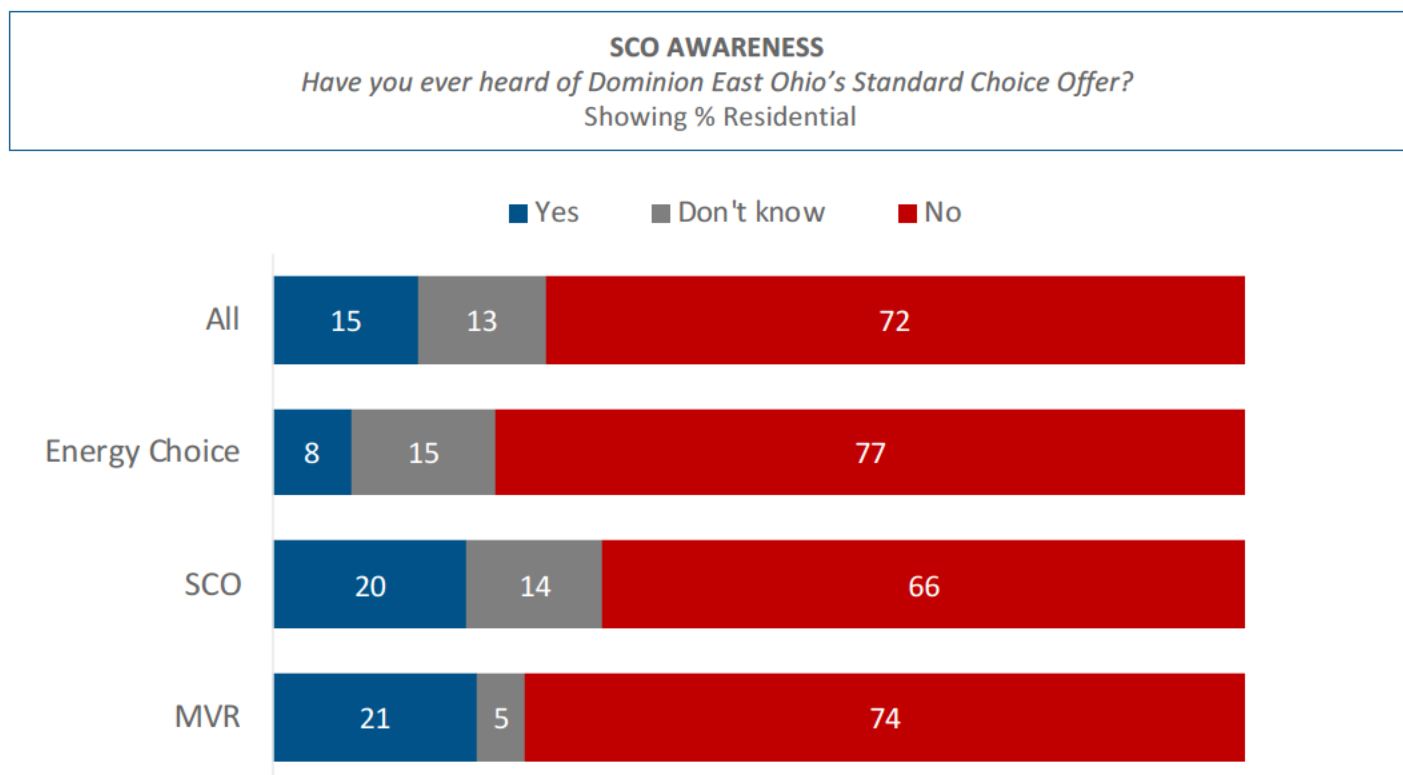


Standard Choice Offer

WINNING KNOWLEDGE™

Awareness of SCO is low across all audiences

- Only 1 in 5 of current Standard Choice Offer customers have ever heard of the rate plan



Most are generally favorable toward SCO

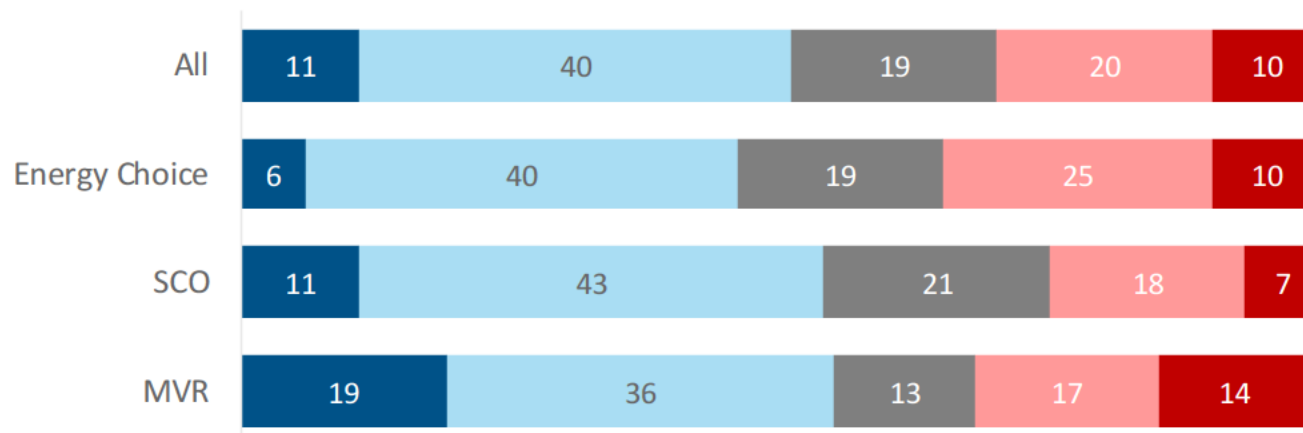
RESPONDENTS HEARD OR READ: Dominion East Ohio offers a 'Standard Choice Offer' which enables customers to let Dominion East Ohio assign them to a supplier at a specified market based variable rate.

SCO FAVORABILITY WITH AIDED AWARENESS

Given what you just read, do you have a very favorable, somewhat favorable, somewhat unfavorable or very unfavorable view of Dominion East Ohio's Standard Choice Offer?

Showing % Residential

■ Very favorable ■ Somewhat favorable ■ Don't know ■ Somewhat unfavorable ■ Very unfavorable

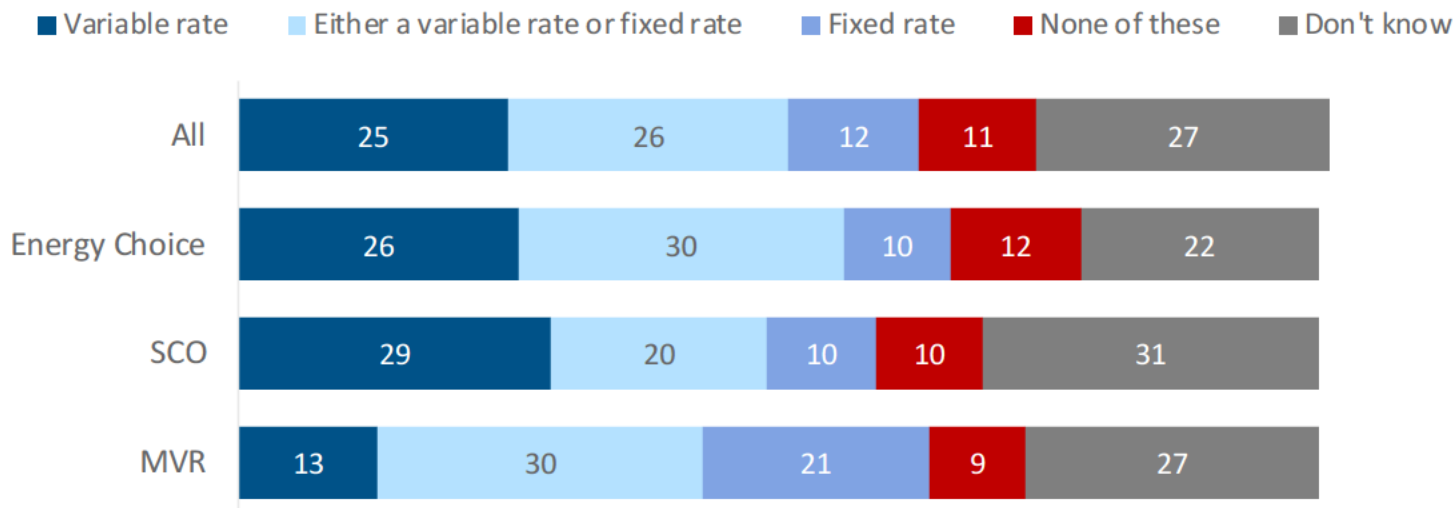


Most think that SCO customers can choose their rate

RESPONDENTS HEARD OR READ: Dominion East Ohio offers a 'Standard Choice Offer' which enables customers to let Dominion East Ohio assign them to a supplier at a specified market based variable rate.

SCO AWARENESS

Given what you just read, can Standard Choice Offer customers choose a variable rate, a fixed rate or either type?
Showing % Residential



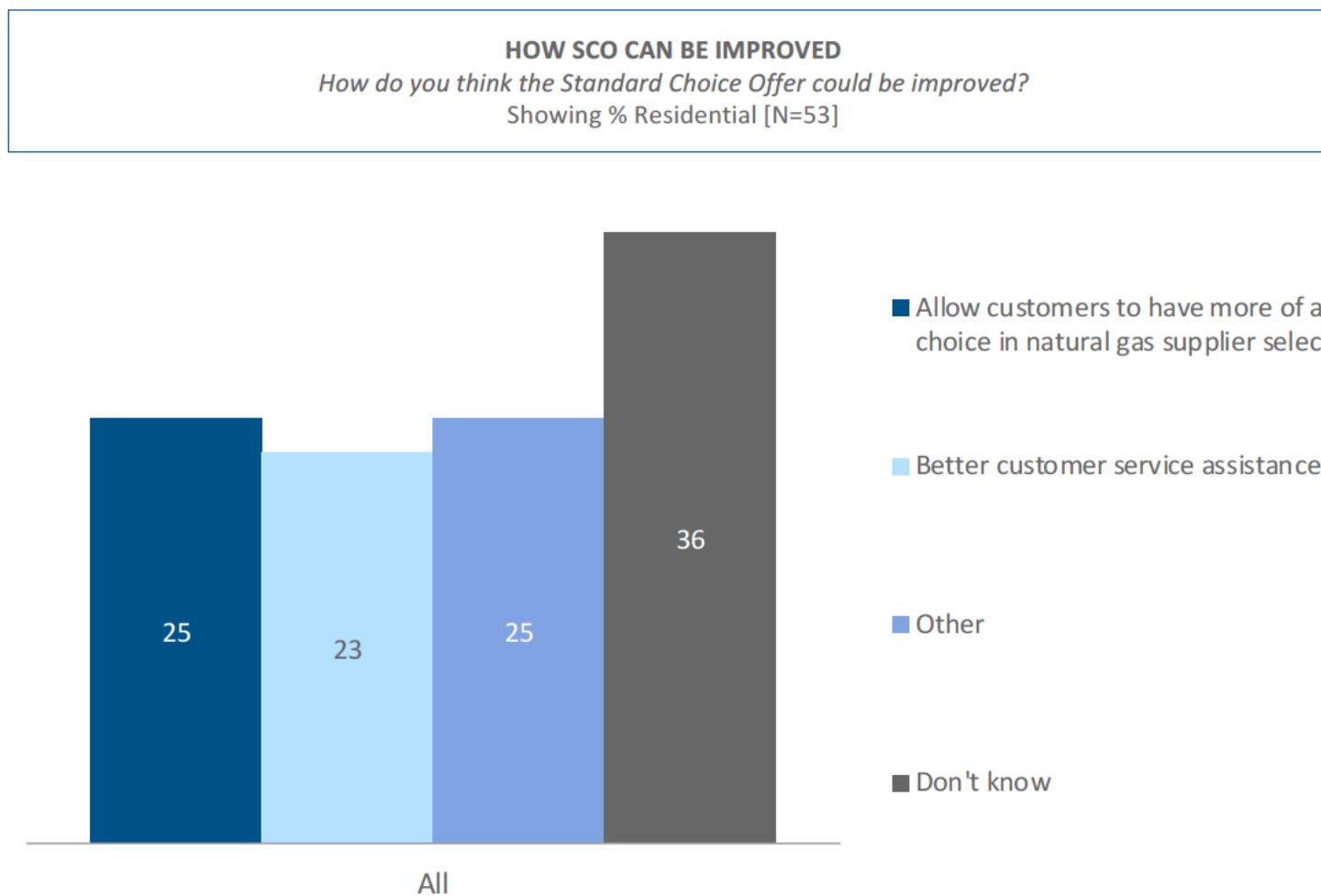
SCO customers believe that their plan can be improved

- However, 40% are unsure if the plan can be improved from its current state

Do you think that the Standard Choice Offer has room for improvement? Showing %	All [N=118]	Energy Choice [N=8]	SCO [N=28]	MVR [N=77]
Yes	55	75	64	49
No	5	0	4	6
Don't know	40	25	32	44

However, many SCO customers indicate that they don't know how the plan could be improved

- Respondents are split on what steps should be taken



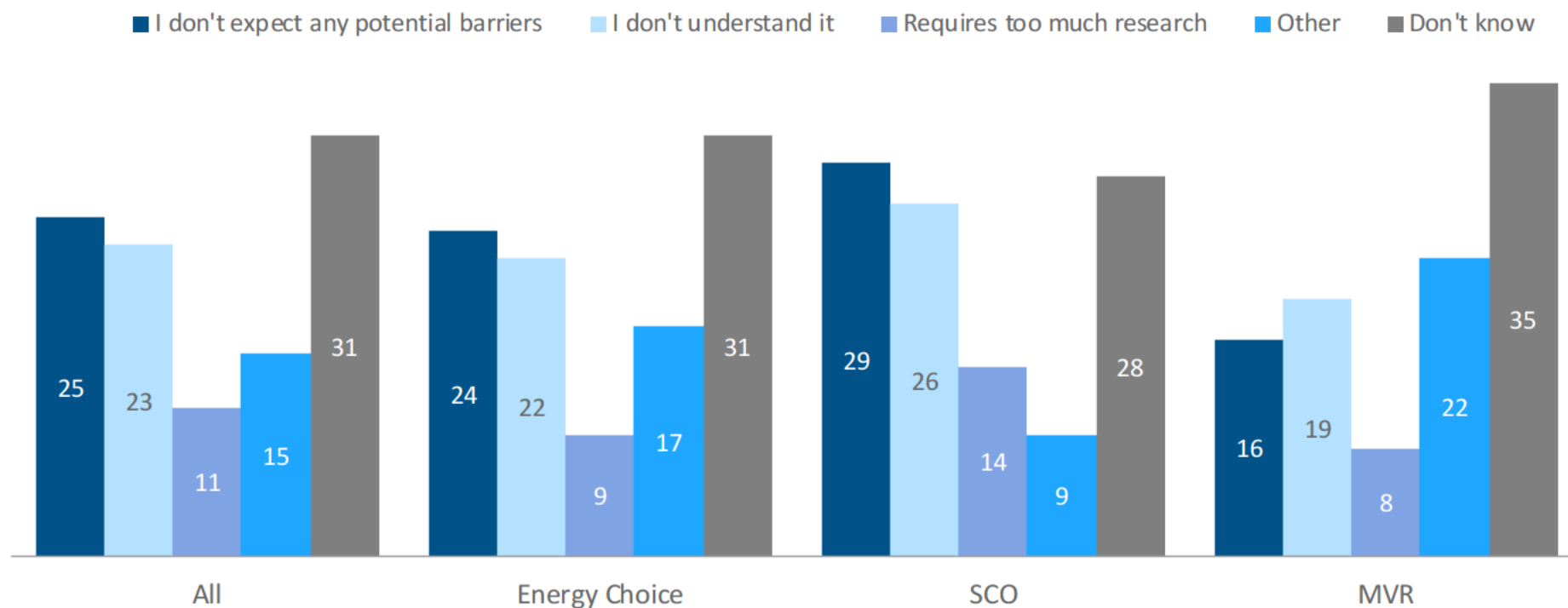
Customers are split on potential barriers to choosing SCO

- At least 1 in 4 across audiences isn't sure of potential barriers to choosing SCO

POTENTIAL BARRIERS TO CHOOSING SCO

What do you see as potential barriers to choosing the Standard Choice Offer?

Showing % Residential, ranked by All



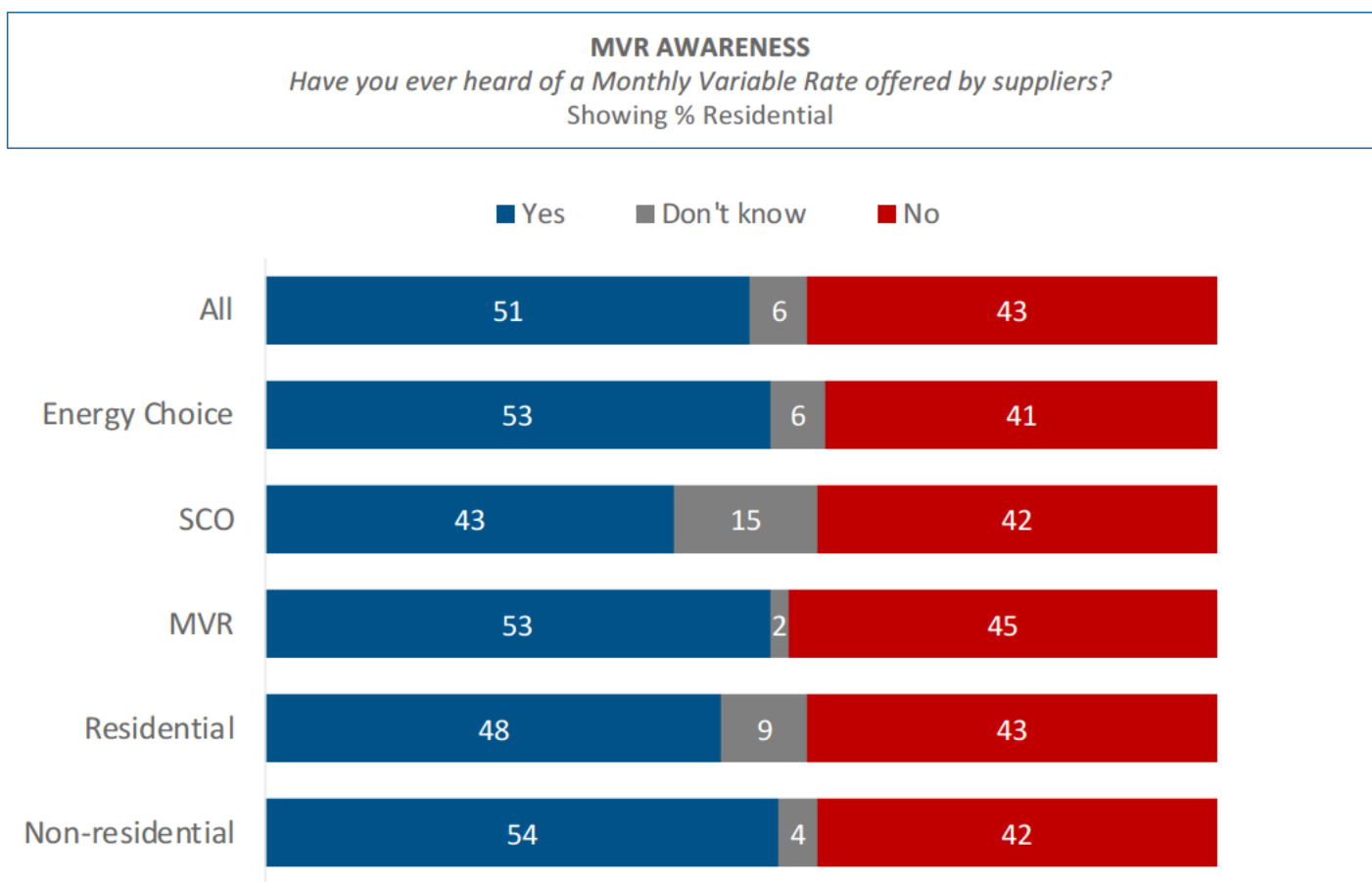


Monthly Variable Rate

WINNING KNOWLEDGE™

Awareness of MVR is mixed across audiences

- Close to half across audiences say that they have heard of the Monthly Variable Rate

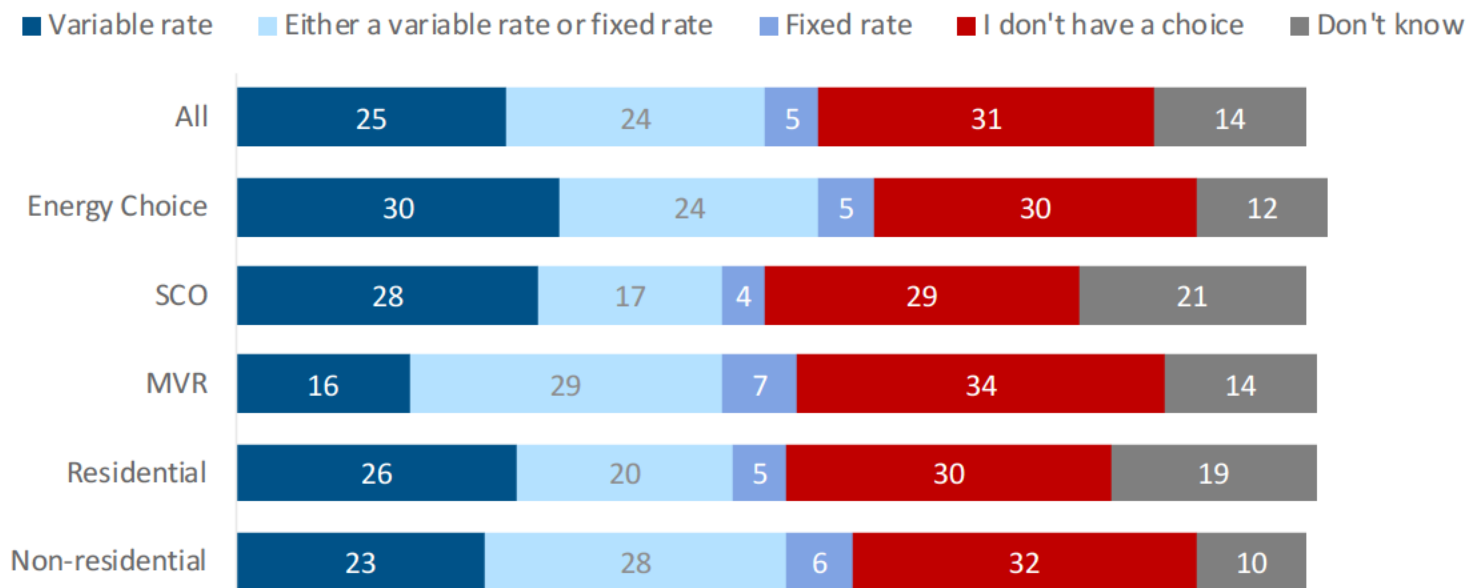


Customers aren't sure what type of choice they have in rate type when in MVR

RESPONDENTS HEARD OR READ: Customers whose contracts have expired are placed on a Monthly Variable Rate. Customers on the Monthly Variable Rate are randomly assigned a natural gas supplier and charged at that supplier's chosen monthly variable rate.

MVR Rate Type Awareness

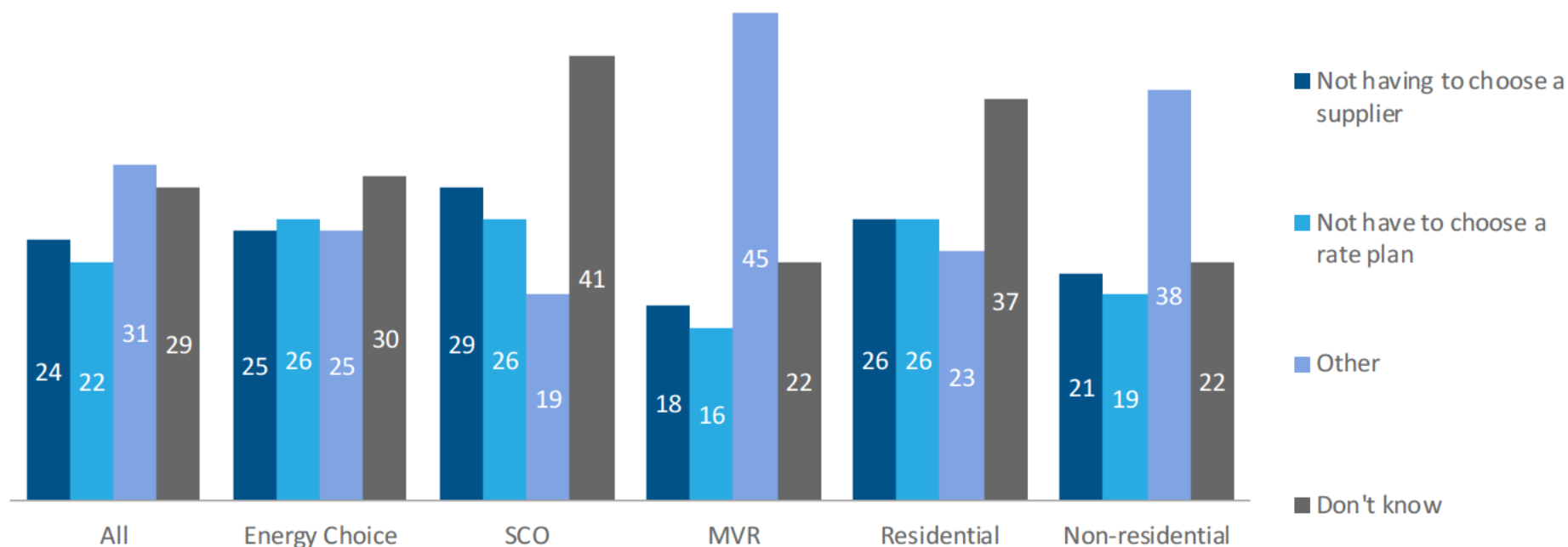
Given what you just read, can Monthly Variable Rate customers choose a variable rate, a fixed rate or either type?
Showing %



Customers are split on what the main benefits of MVR are

BENEFITS OF MVR

What do you see as the main benefits associated with being on a Monthly Variable Rate?
Showing %, ranked by All



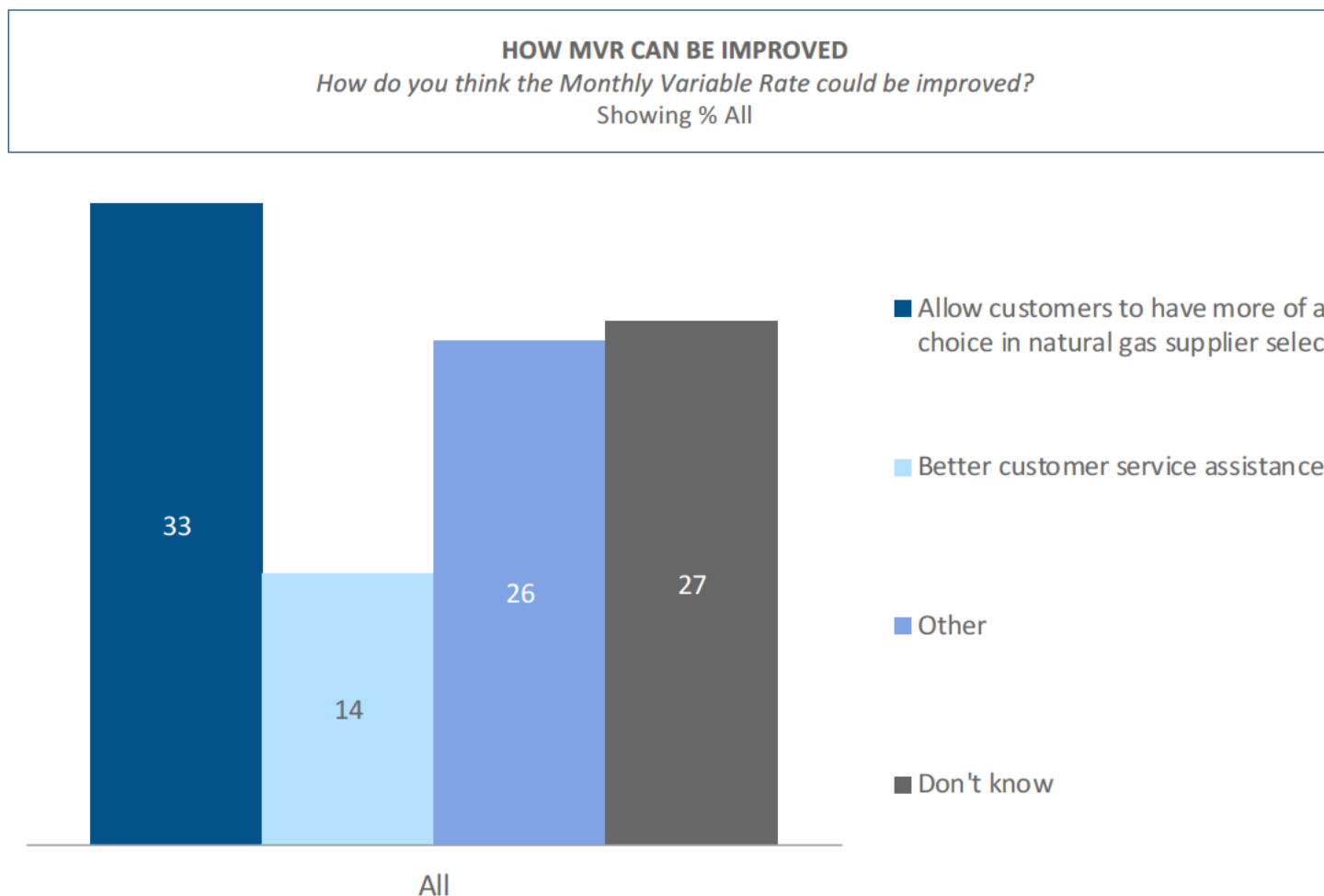
Close to 3 in 4 MVR customers say that the plan could be improved

- Most across audiences see MVR as having room for improvement

Do you think that the Monthly Variable Rate has room for improvement? Showing %	All [N=177]	Energy Choice [N=69]	SCO [N=23]	MVR [N=85]	Res [N=78]	Non-res [N=99]
Yes	76	75	65	78	73	77
No	6	5	0	8	8	6
Don't know	18	20	35	14	19	18

Most think MVR can be improved by allowing customers to have more choice in supplier selection

- Close to 1 in 3 say that MVR can be improved by allowing customers have more choice in selecting a supplier



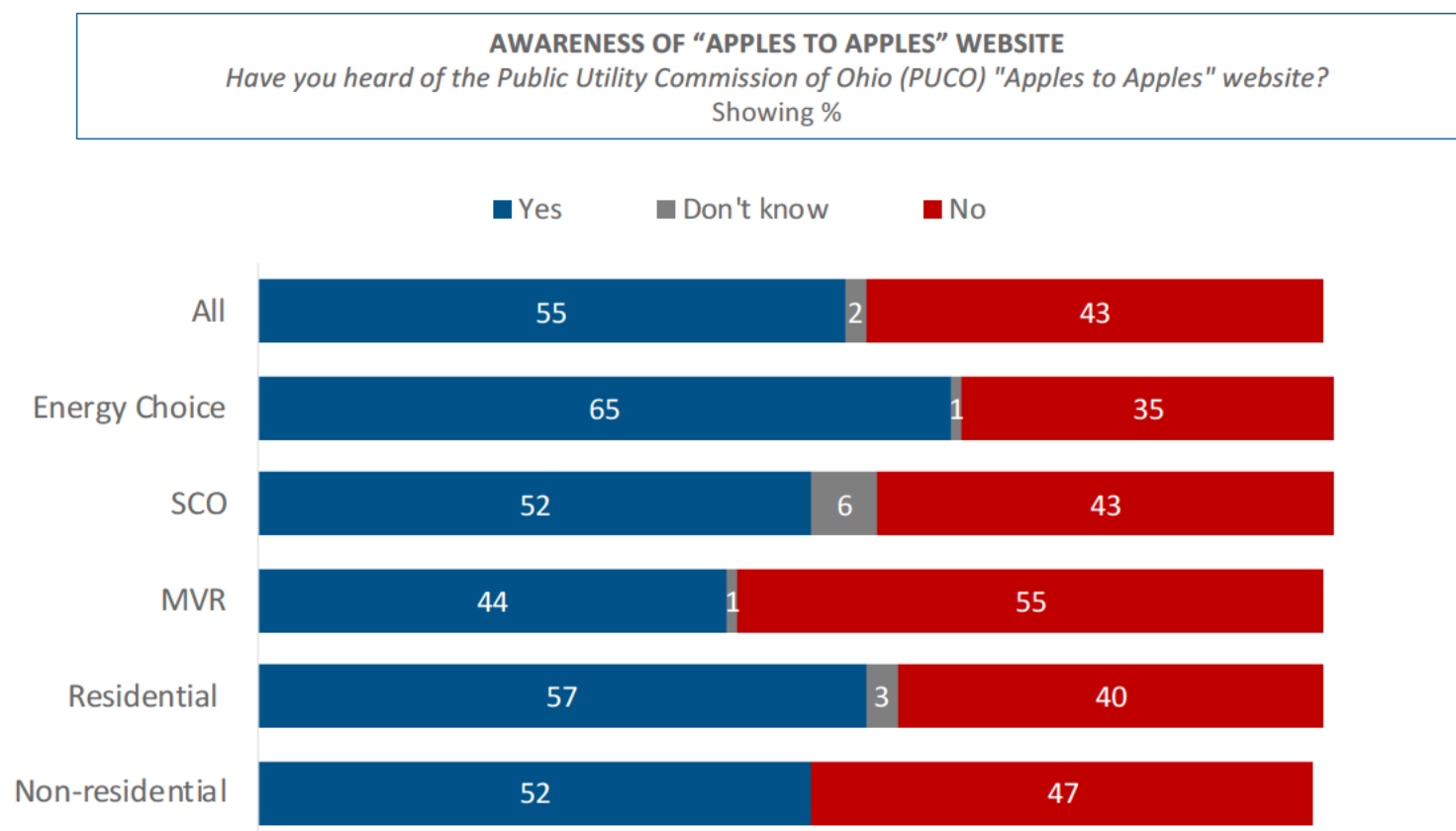


PUCO “Apples to Apples” Website

WINNING KNOWLEDGE™

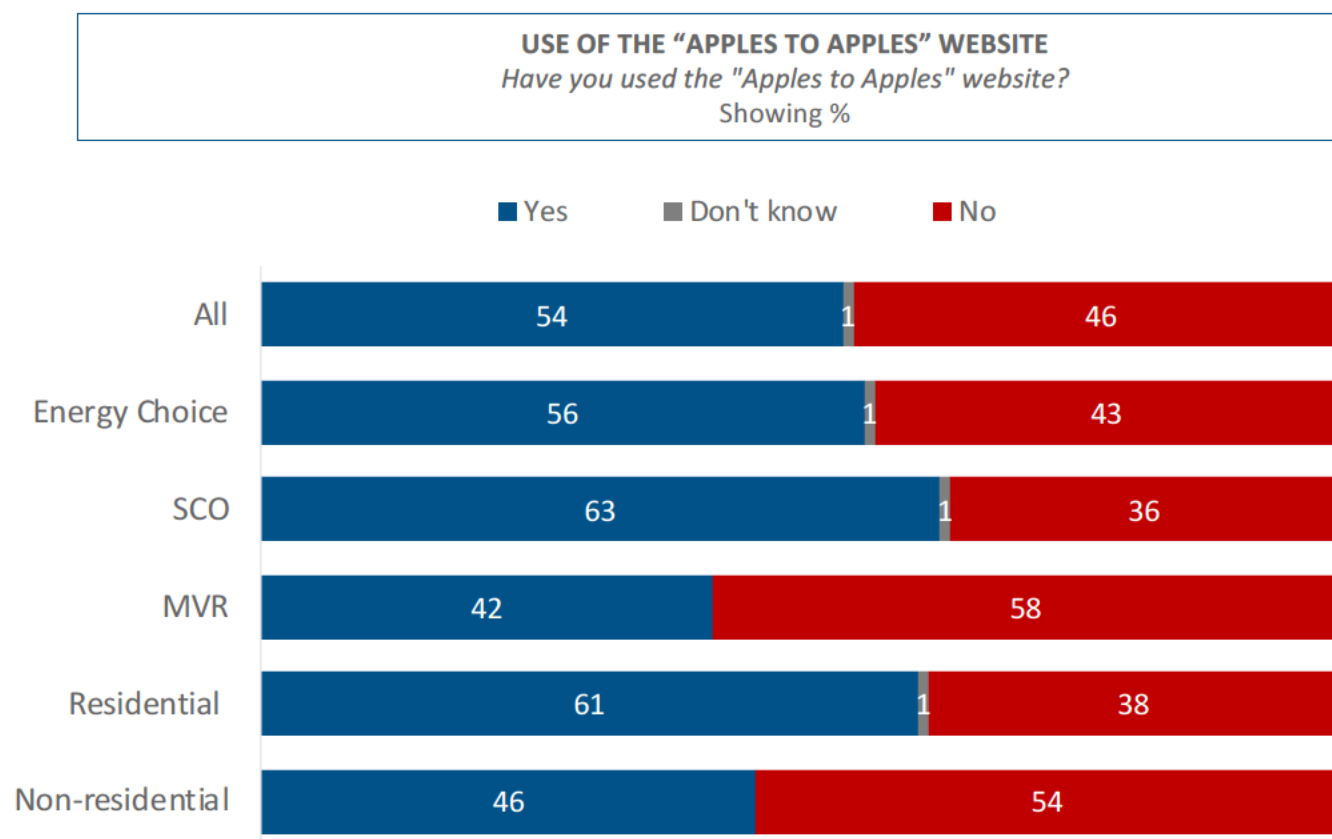
Awareness of the “Apples to Apples” website is highest among Energy Choice customers

- Close to half across audiences say that they have heard of the PUCO “Apples to Apples” website



SCO and Energy Choice customers are the most likely to have used the Apples to Apples website

- MVR customers are the least likely to have used the “Apples to Apples” website



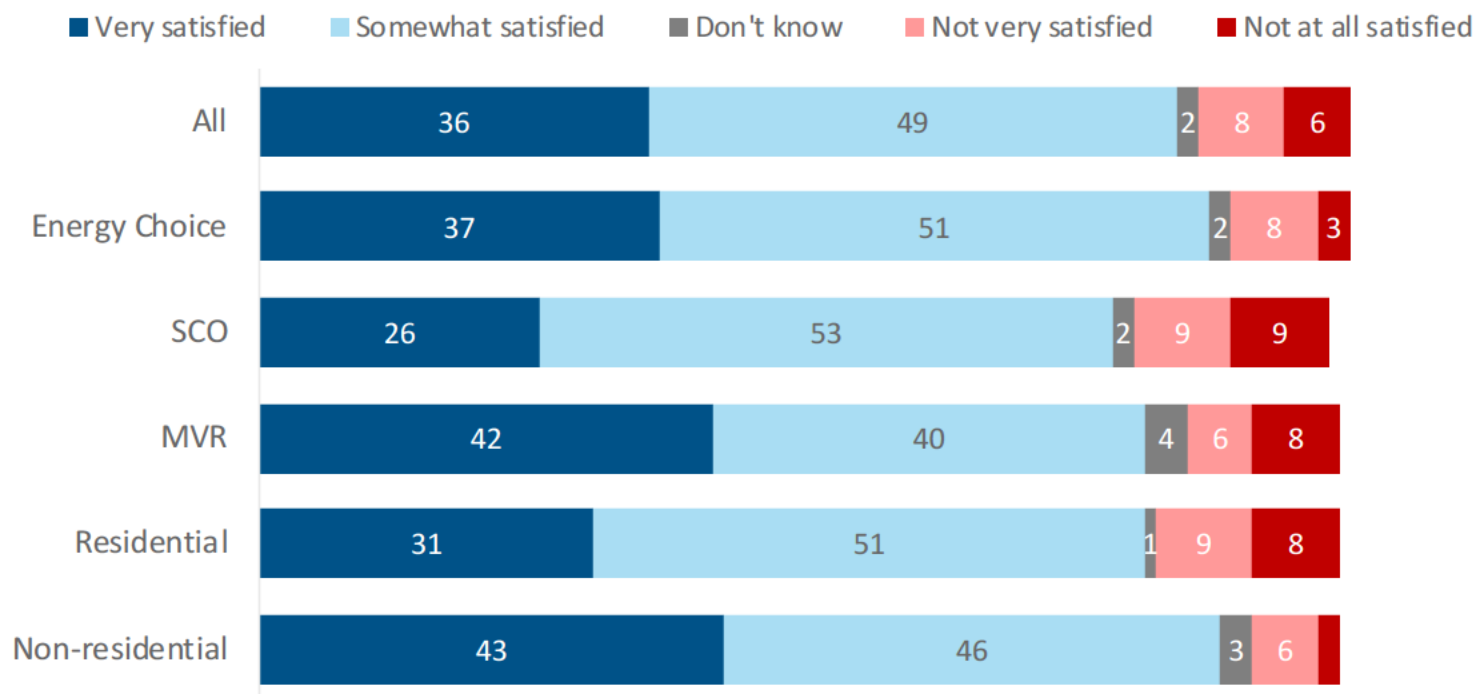
Most who have used the Apples to Apples website say that they are satisfied with the website

SATISFACTION WITH THE PUCO APPLES TO APPLES WEBSITE

How satisfied are you with the "Apples to Apples" website?

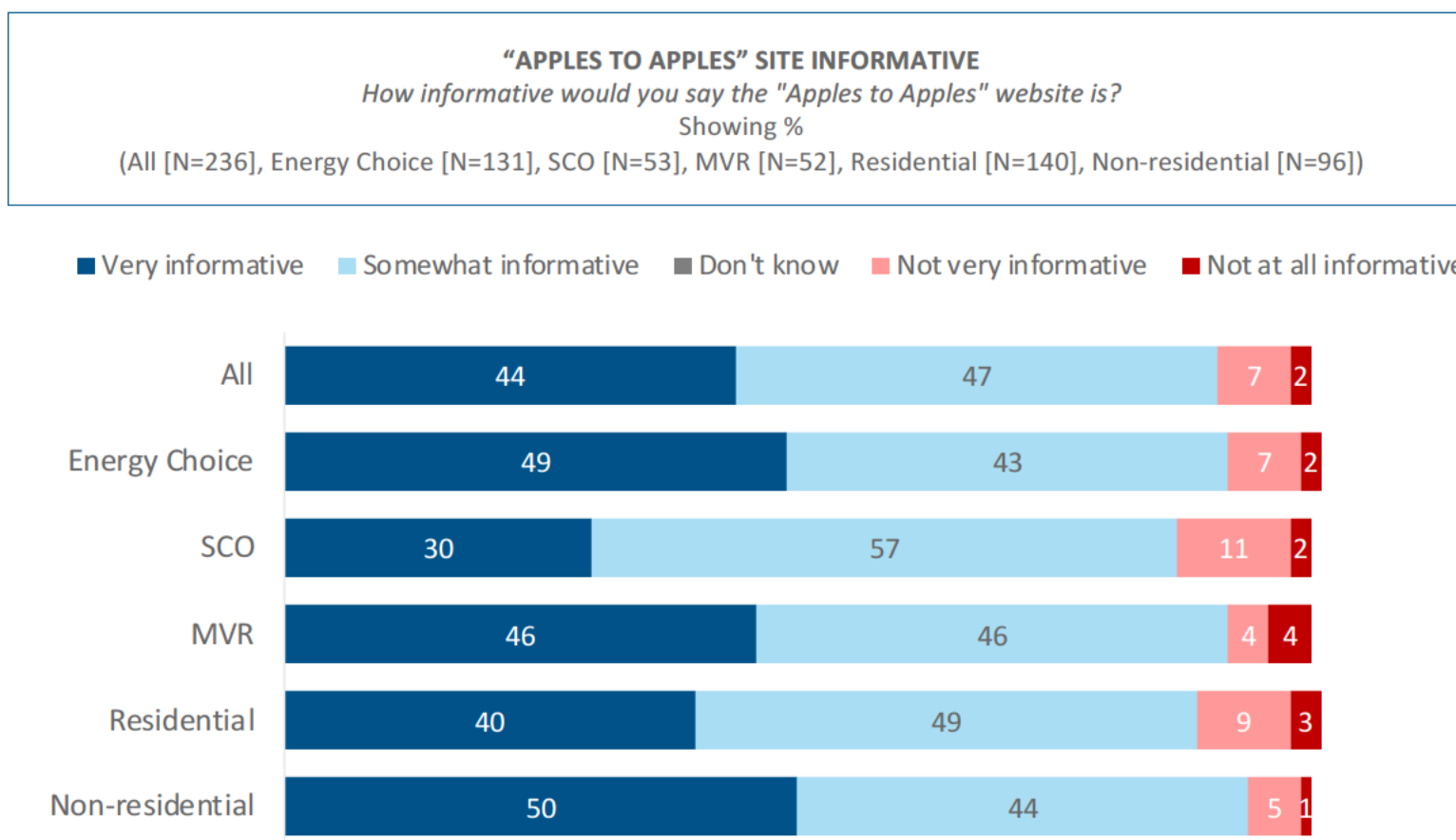
Showing %

(All [N=236], Energy Choice [N=131], SCO [N=53], MVR [N=52], Residential [N=140], Non-residential [N=96])



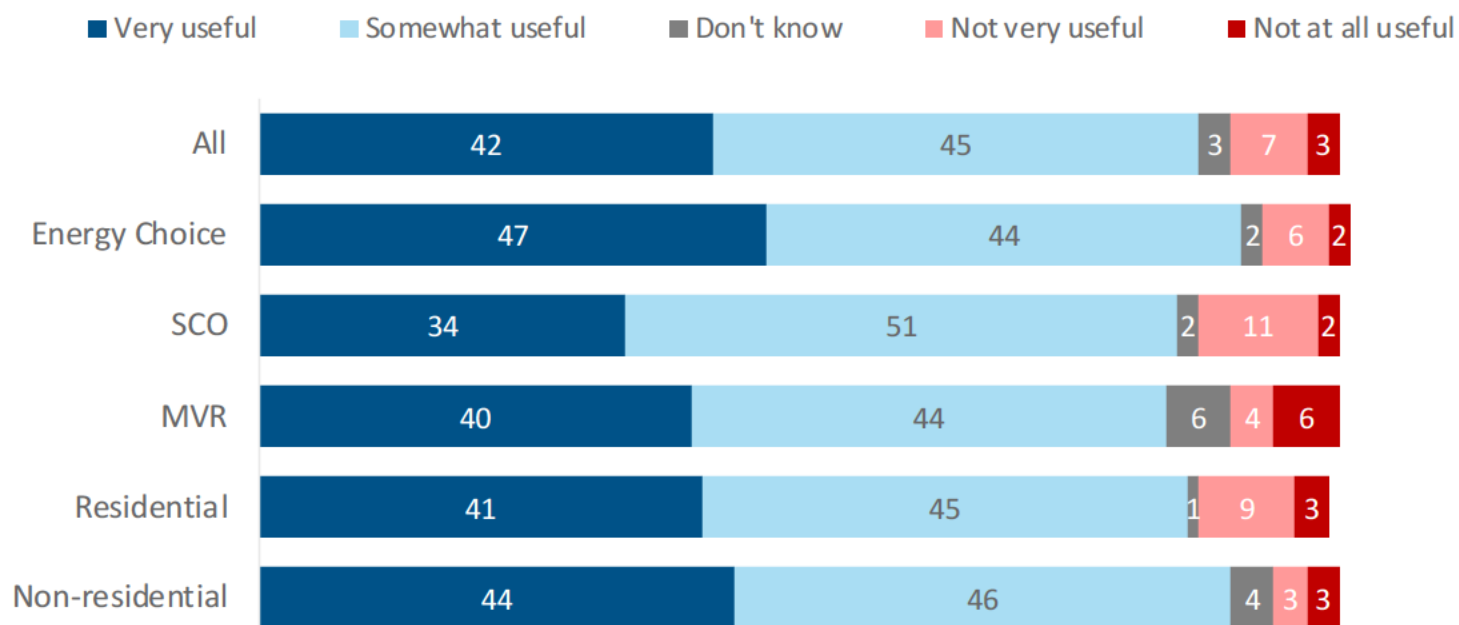
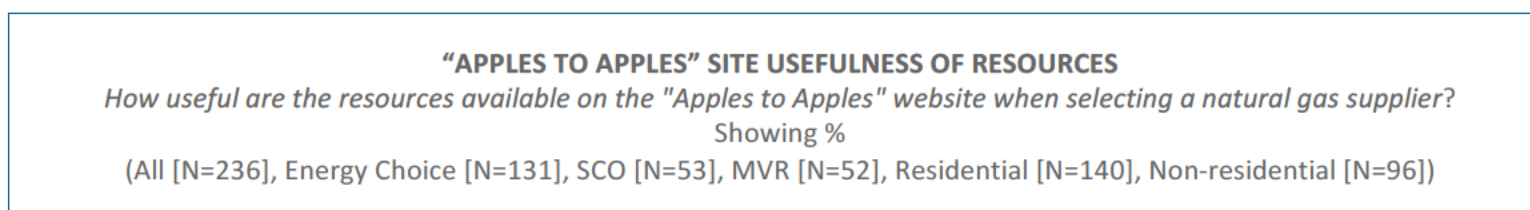
Most say that the Apples to Apples site is informative

- Non-residential customers are most likely to consider the Apples to Apples site “Very informative”



Most who have used the Apples to Apples website say that the resources provided on the site are useful

- Energy Choice customers are most likely to say that the resources available on the Apples to Apples site are “Very useful”

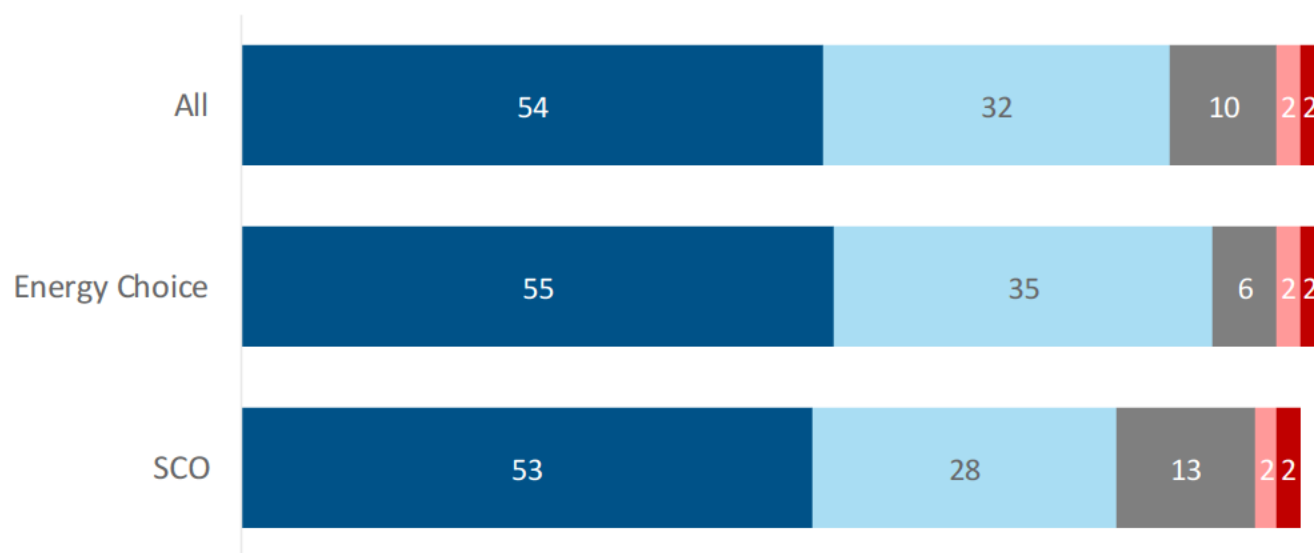


After seeing screenshots from Apples to Apples, most say that the website is “Very informative”

“APPLES TO APPLES” SITE INFORMATIVE

How informative would you say the “Apples to Apples” website is?
Showing % Residential

■ Very informative ■ Somewhat informative ■ Don't know ■ Not very informative ■ Not at all informative



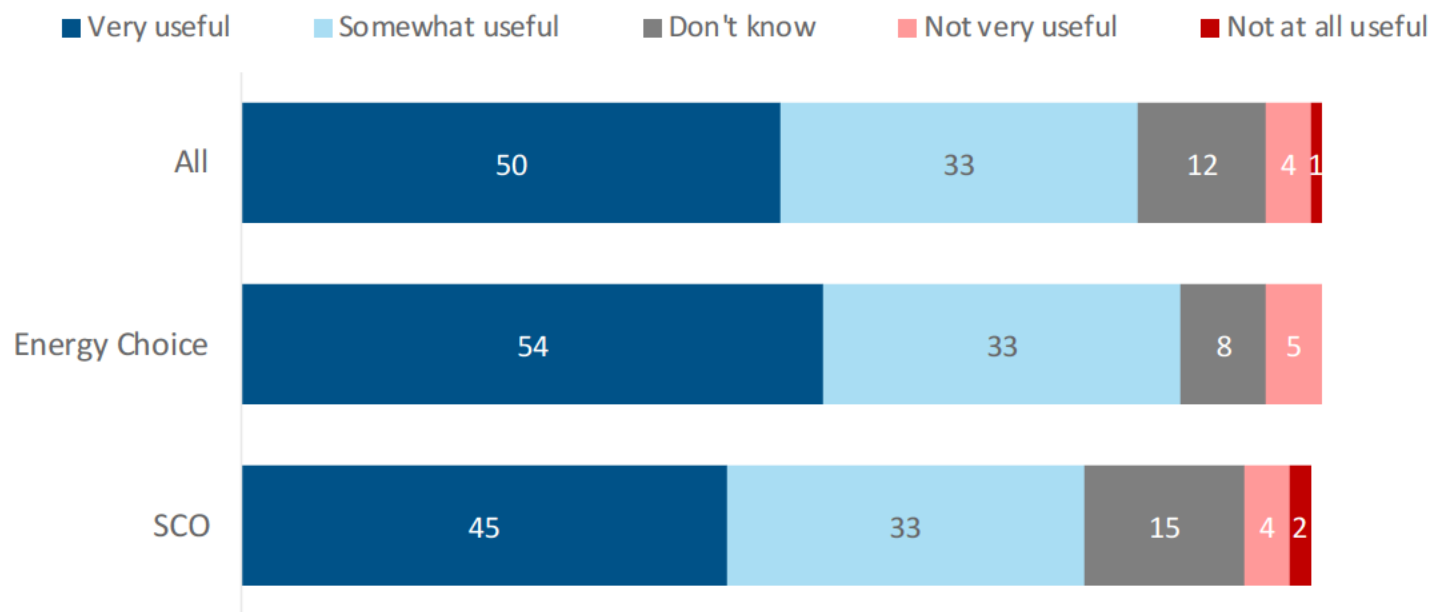
After viewing Apples to Apples screenshots, close to half of all customers say that the resources are “Very useful”

- SCO customers are the least likely to say that the resources provided on the Apples to Apples site are “Very useful”

“APPLES TO APPLES” USEFULNESS OF RESOURCES

Given what you just saw and read, how useful are the resources available on the "Apples to Apples" website when selecting a natural gas supplier?

Showing % Residential



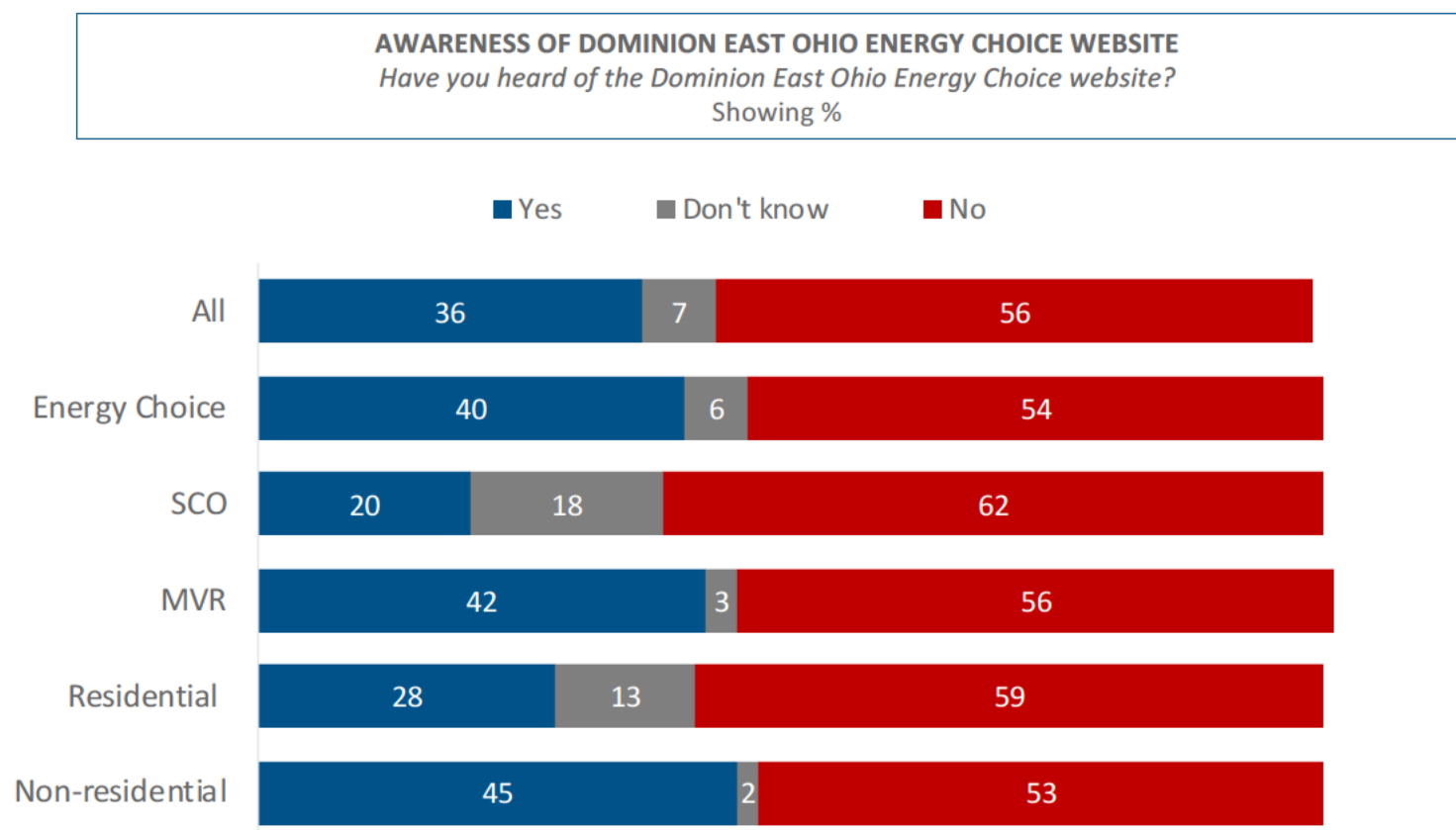


Dominion East Ohio Energy Choice Website

WINNING KNOWLEDGE™

Most haven't heard of the Dominion East Ohio Energy Choice website

- More than half across audiences have not heard of the Dominion East Ohio Energy Choice website



Customers like that the Dominion East Ohio Energy Choice website provides them with enough information

- As we found in the focus groups, customers like the amount of information provided on the Dominion East Ohio Energy Choice website, but they are lukewarm about the website's design

FEATURES THAT STOOD OUT FROM SCREENSHOTS OF THE DOMINION EAST OHIO ENERGY CHOICE SITE

What did you like best about what you just saw?

Showing %

RESIDENTIAL SCO

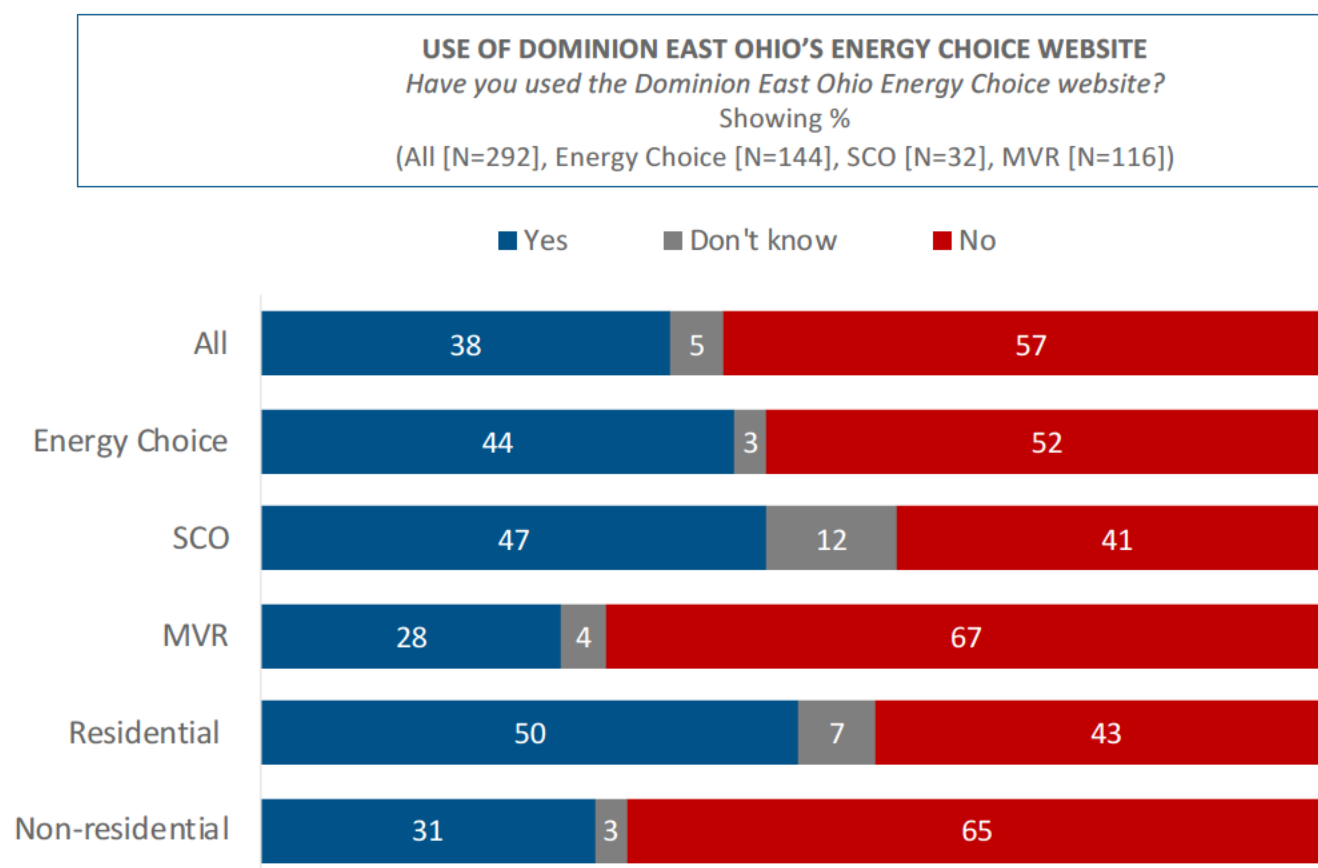


RESIDENTIAL ENERGY CHOICE



SCO and Residential customers are the most likely to have used the Dominion East Ohio Energy Choice website

- MVR and Non-residential customers are the least likely to have used the Dominion East Ohio Energy Choice website



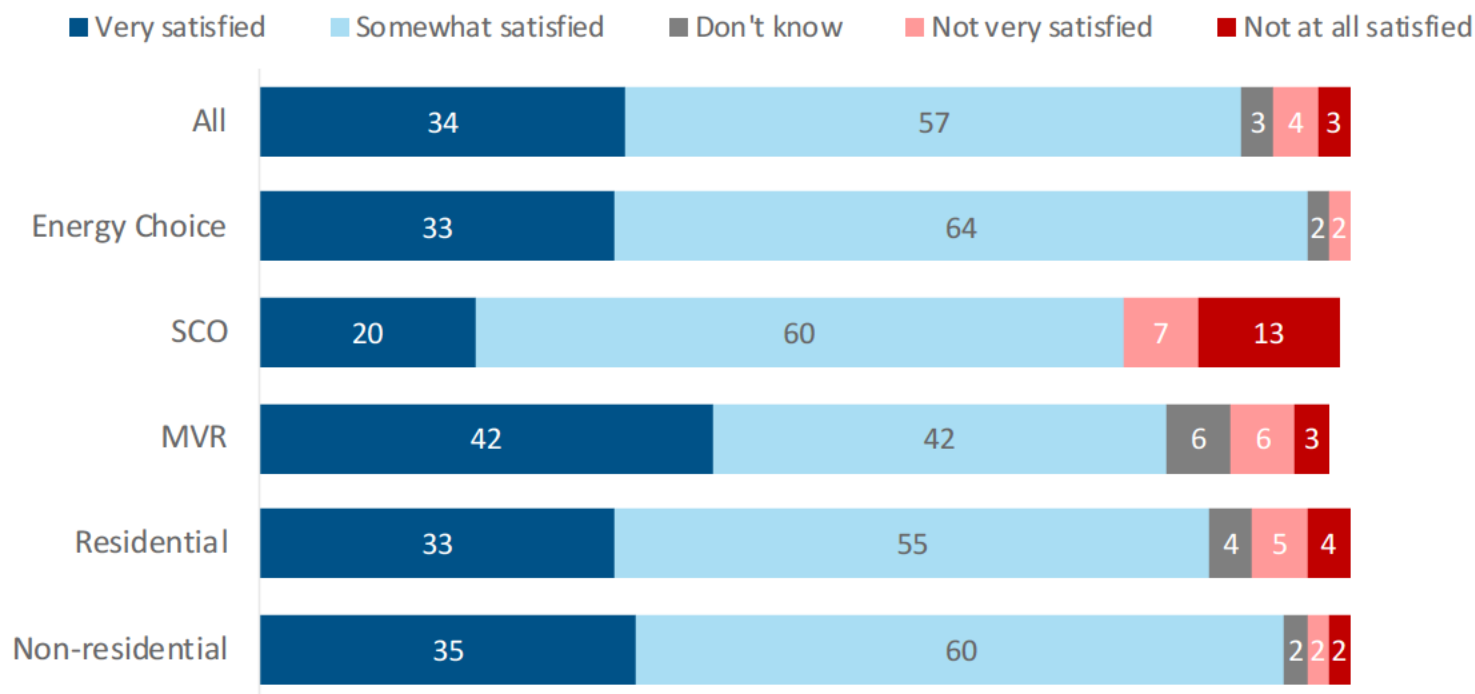
Most who have used the Dominion East Ohio Energy Choice website say that they were satisfied

SATISFACTION WITH THE DOMINION EAST OHIO ENERGY CHOICE WEBSITE

How satisfied are you with the Dominion East Ohio Energy Choice website?

Showing %

(All [N=112], Energy Choice [N=64], SCO [N=15], MVR [N=33], Residential [N=55], Non-residential [N=57])



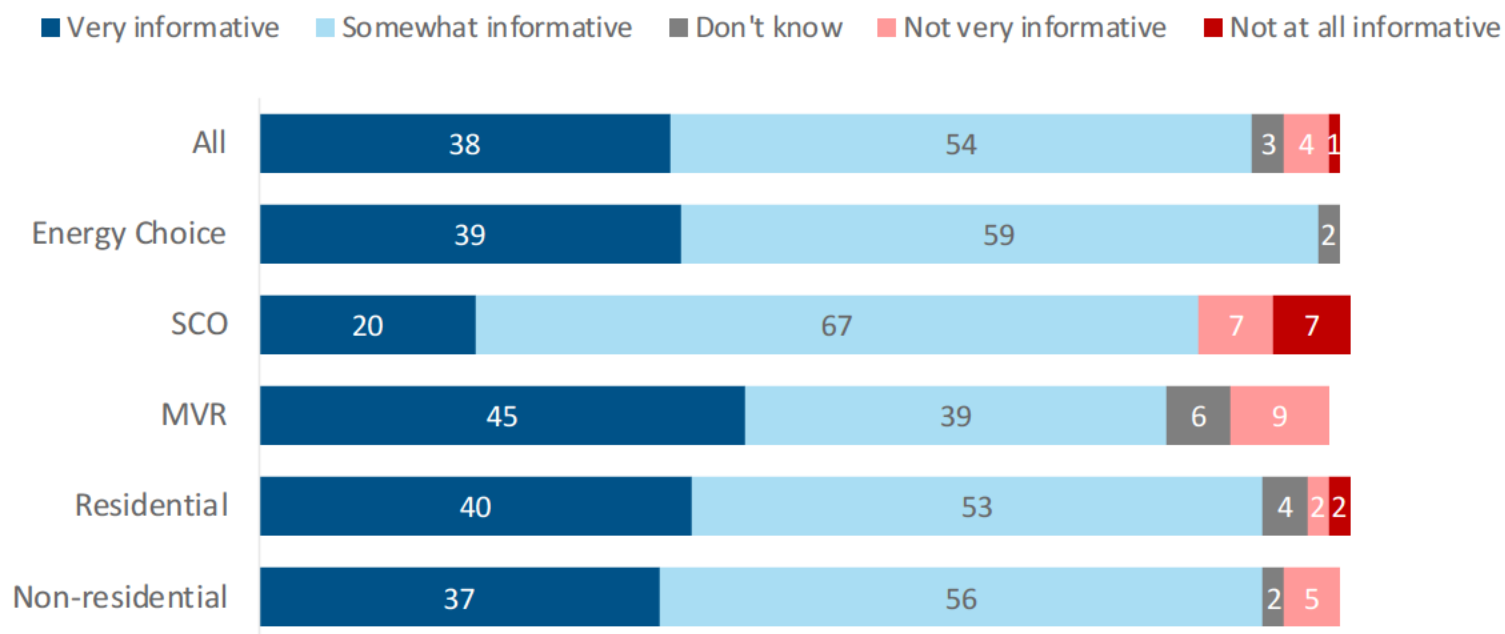
Most customers see the Dominion East Ohio Energy Choice website as informative

DOMINION EAST OHIO ENERGY CHOICE SITE INFORMATIVE

How informative would you say the Dominion East Ohio Energy Choice website is?

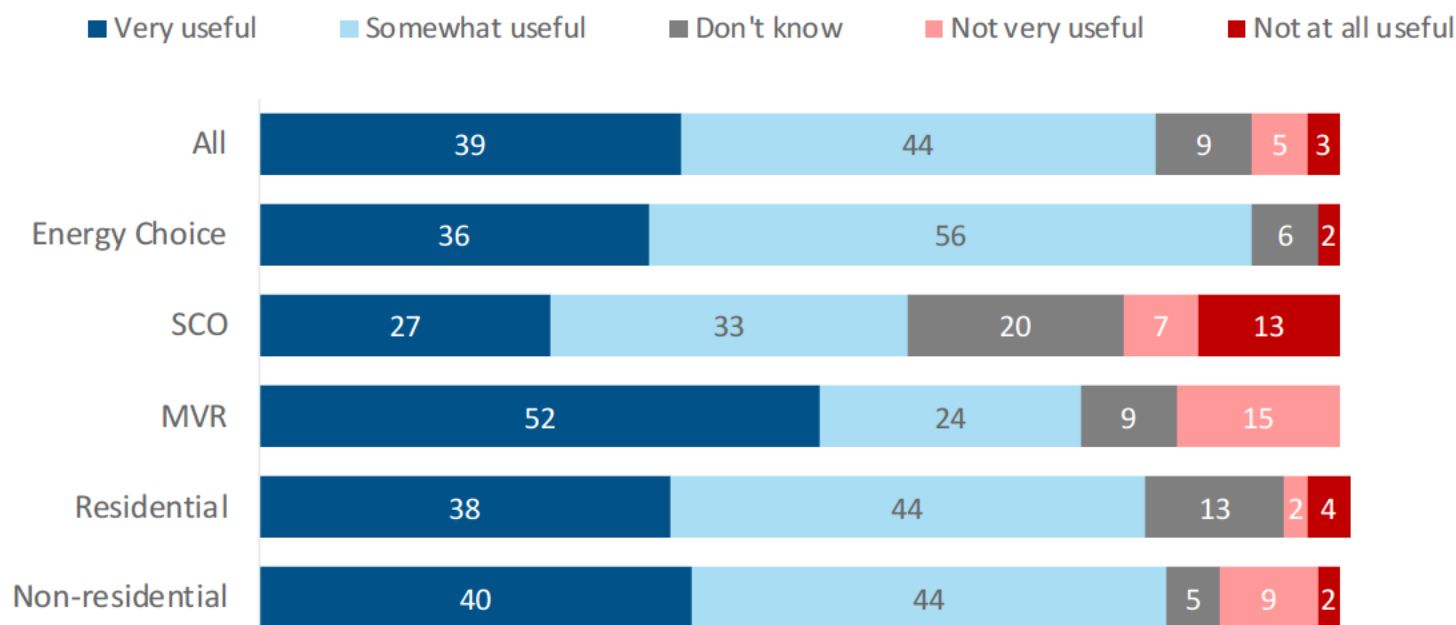
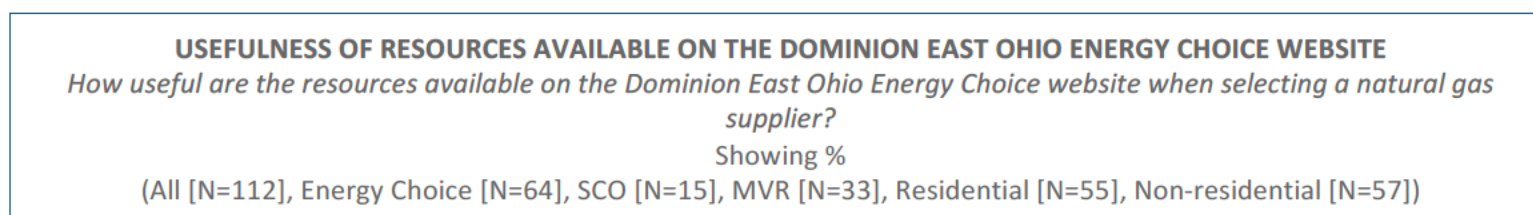
Showing %

(All [N=112], Energy Choice [N=64], SCO [N=15], MVR [N=33], Residential [N=55], Non-residential [N=57])



Most say that the resources available on the Dominion East Ohio Energy Choice website are useful

- Close to half of all Energy Choice and Non-residential customers consider the resources available on the site to be “Very useful”



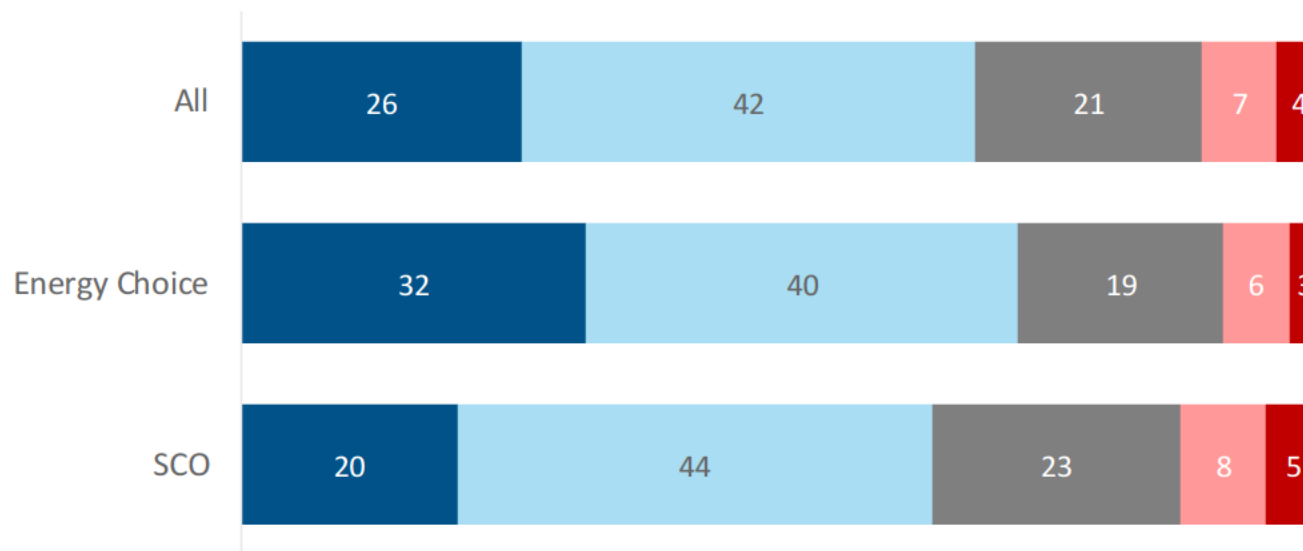
After seeing screenshots of the Dominion East Ohio Energy Choice site, most say the website is informative

- A significant proportion across audiences are not sure if the website is informative or not informative

DOMINION EAST OHIO ENERGY CHOICE SITE INFORMATIVE

Given what you just saw and read, how informative would you say the Dominion East Ohio Energy Choice website is?
Showing % Residential

■ Very informative ■ Somewhat informative ■ Don't know ■ Not very informative ■ Not at all informative

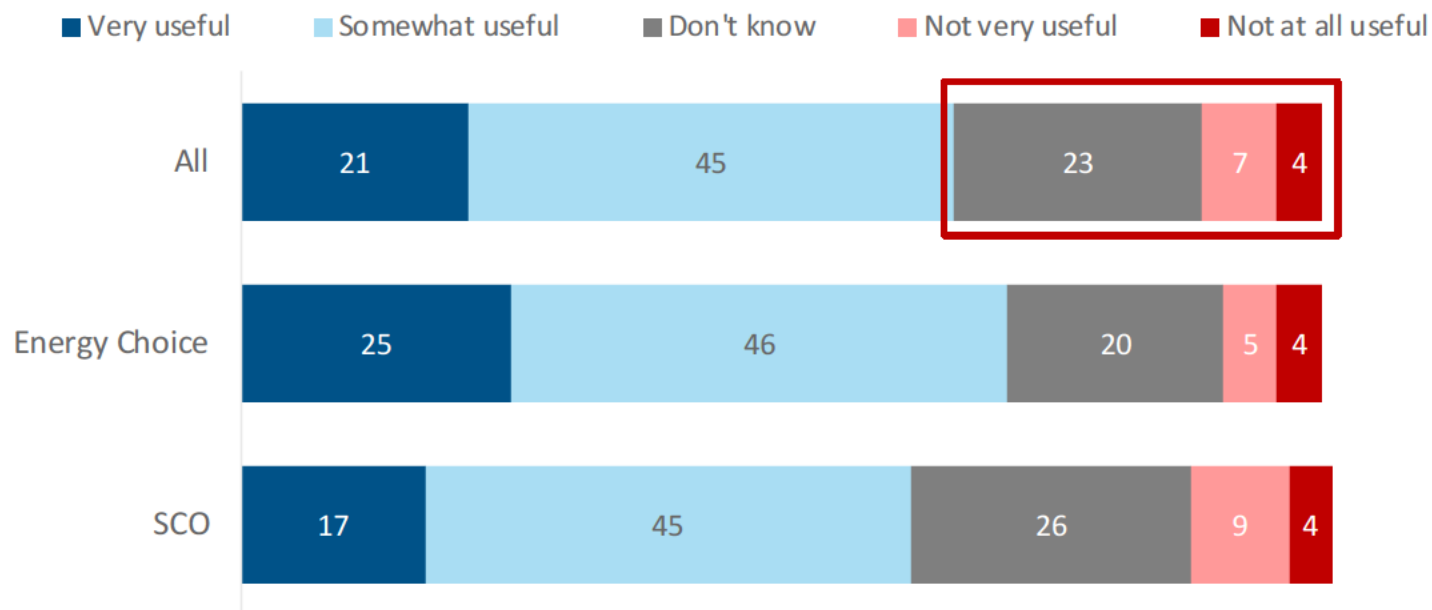


While most say that the resources on the Dominion East Ohio site are useful, a significant number aren't sure

DOMINION ENERGY CHOICE USEFULNESS OF RESOURCES

Given what you just saw and read, how useful are the resources available on the Dominion East Ohio Energy Choice website when selecting a natural gas supplier?

Showing % Residential

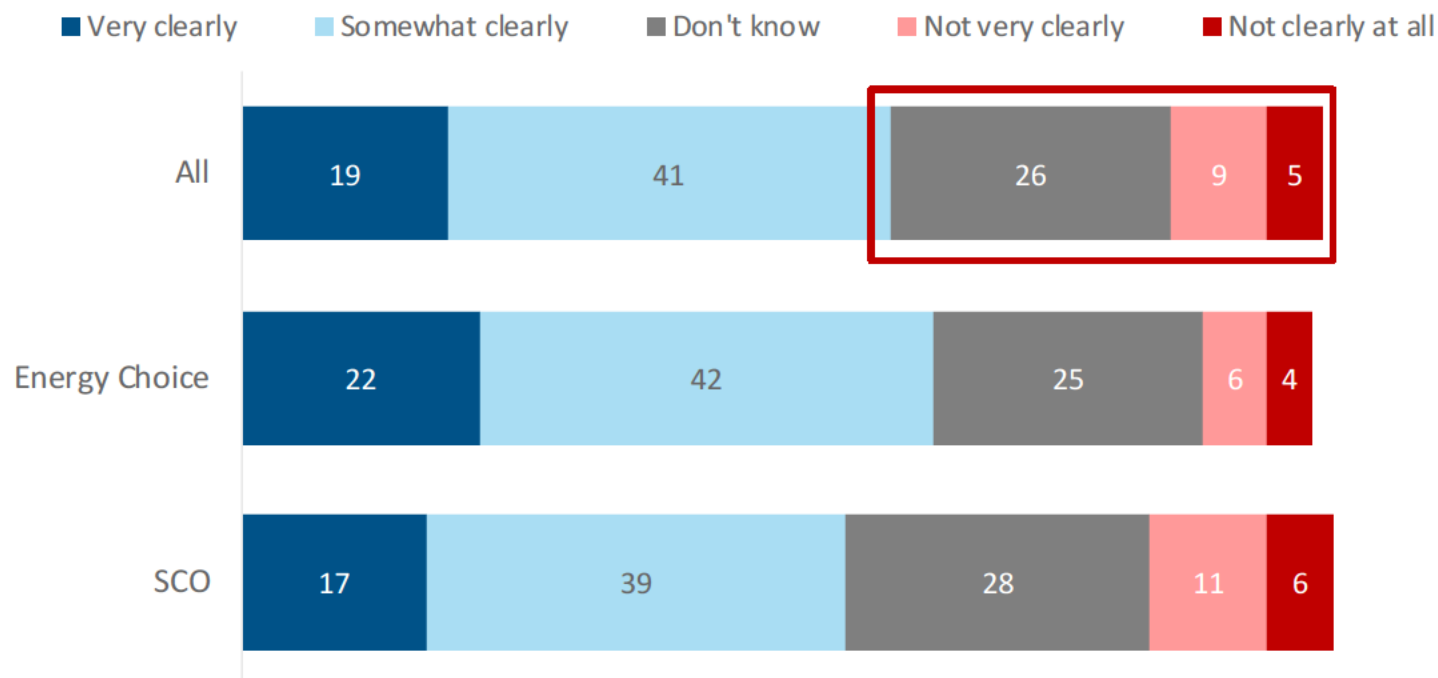


Most say that rate plan types are explained clearly on the Energy Choice site but a significant number aren't sure

DOMINION EAST OHIO ENERGY CHOICE EXPLANATION OF DOMINION PLAN TYPES

Given what you just saw and read, how clearly does the Dominion East Ohio Energy Choice website explain the various rate plan options (Energy Choice, Standard Choice Offer, Monthly Variable Rate) offered by Dominion East Ohio?

Showing %



After seeing the websites, most are unsure if they will enroll in Energy Choice

POST WEBSITE EXPOSURE LIKELIHOOD TO JOIN ENERGY CHOICE

Given all that you have read, how likely are you to enroll in Energy Choice next time you review your natural gas rate plan options?
Showing % Residential

