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BACKGROUND

Southern California Edison recognizes that wildfires are an increasing threat within its service territory. One of the ways it has identified to reduce the chance of its electrical infrastructure playing a role in starting a fire during a severe fire threat period is to proactively cut the power to parts of the territory. The program is called Public Safety Power Shutoff (PSPS) and Edison has begun implementing these events multiple times per year in various parts of the service territory. Going forward, Edison wants to understand customer awareness, experience, and opinions of the practice, and how that affects their opinion toward Edison.

ESSENTIAL What do Business customers know and think about the PSPS practice, and how do they feel about Southern California Edison as a result?

METHODOLOGY

A 15-minute survey was conducted from 1/14/19 - 3/2/20 online and on the phone among Southern California Edison Business customers. Survey respondents were the primary parties responsible for paying the electricity bills for their companies.

	DE-ENERGIZED	NOTIFIED ONLY	NOT NOTIFIED	NOT IN HIGH- RISK AREA	TOTAL
ONLINE	34	100	70	76	280
PHONE	100	100	100	100	400
COMBINED	134	200	170	176	680

Statistical significance is noted throughout the report at the 95% and 90% confidence levels by uppercase and lowercase letters, respectively.



Much like Residential customers, Business customers who have been most disrupted by PSPS have worse opinions of Edison.

Merely receiving alert notifications decreases favorability, with de-energized customers having the least favorable opinions.

SCE FAVORABILITY

	Mean Score	Net Favor- ability	Bottom 3 Box	Middle 4 Bo (4-7)	Top 3 Box (8-10)
De-Energized (A)	6.7	-18	11%	41% ^d	47%
Notified Only	7.4 ^	7	8%	36%	57%
Not Notified	7. 7 ^	15		33%	61% ^A
Not in High- Risk Area (D)	7.6 ^A	16	7%	32%	61% ^A

FEELINGS TOWARD SCE (Top 3 Box, 8/9/10)

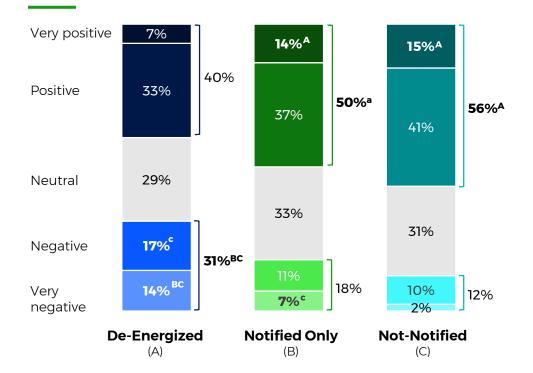
	De-Energized (A)	Notified Only	Not Notified (C)	Not in High- Risk Area (⊃)
Is committed to restoring power to customers affected by wildfires	51%	66 % ^A	76 % ^{AB}	69 % ^A
Actively works with first responders to keep communities safe during wildfires	49%	64 % ^A	73 % ^A	67 % ^A
Takes proactive measures to protect the electricity grid from wildfires	44%	53%	59% ^A	58% ^A
Takes proactive measures to protect communities from the risks of wildfires	43%	53% ^a	62% ^A	56% ^A
Supports nonprofits and communities affected by wildfires	37%	43%	55% ^{Ad}	41%
Shows care and concern for its customers	34%	46% ^A	53% ^A	53% ^A
Is a company you trust to act in the best interest of its customers	30%	45% ^A	52 % ^A	51% ^A

Base: Total Respondents (De-Energized n=134, Notified Only n=200, Not Notified n=170 Not in High-Risk Area n=176); Q1, Q12; for a comparison snapshot with Residential customer data, refer to slide 40

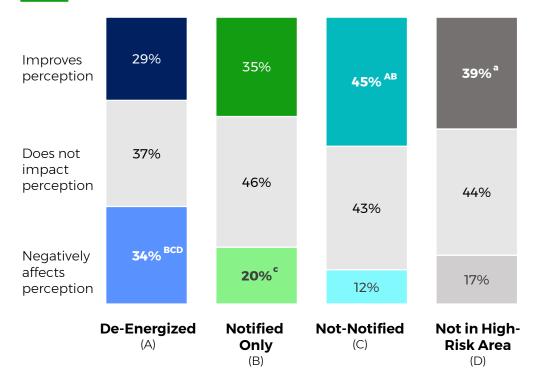
Those who experience PSPS events are significantly more likely to have an unfavorable opinion of the practice.

Business customers have similar opinions of PSPS as Residential customers, with about a third of de-energized customers having a negative opinion of the practice.

OPINION OF PSPS PRACTICE*



PSPS IMPACT ON OPINION OF SCE

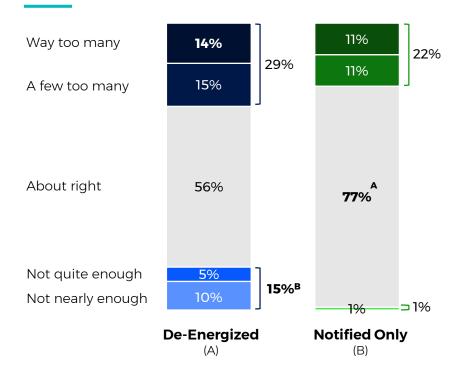


A closer look at PSPS notifications

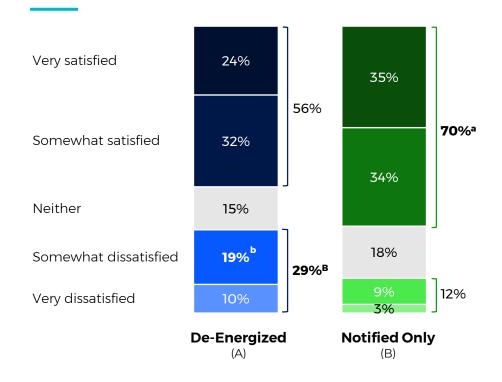
De-energized customers are less satisfied with the frequency and content of PSPS alerts compared to those who were notified but did not experience an event.

Almost 8-in-10 customers who were Notified Only feel the number of alerts they received was appropriate.

FEELING ABOUT NUMBER OF ALERTS



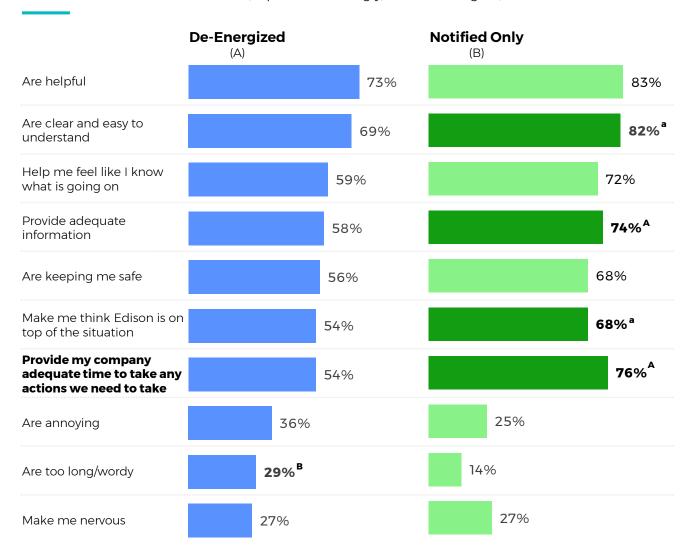
SATISFACTION OF INFORMATION IN ALERTS



De-energized Business customers are not as satisfied with the information in the alerts, especially when it comes to providing adequate time information needed to prepare for the event.

These customers also think the current alerts are too wordy.

ATTITUDES ABOUT ALERTS (Top 2 Box - Strongly/Somewhat Agree)



Most customers would find the addition of links to maps and approximate outage times to be useful resources.

Customers prefer to be on top of the situation and receive notifications as often as conditions change.

USEFULNESS OF ADDING...

...a link to a map where you could enter your address to learn more about the PSPS event impacting your service

	De- Energized	Notified Only (B)	Not Notified (C)	Desired frequency of link notification	De- Energized (A)	Notified Only (B)	Not Notified (C)
Net: Top 2 Box	81%	81%	78 %	Initially, when it is first known I may be impacted;	19%	26%	24%
Extremely useful	52%	54%	50%	and again once the PSPS 50% event has ended.			
Very useful	29%	27%	28%	Daily, as long as my service may be impacted; and again once the PSPS event has ended.	13%	17%	14%
Somewhat useful	13%	15%	15%	Notify me once and send a			
Not very useful	2%	2%	4%	link so I can monitor the map; and again once the PSPS event has ended.	22% ^b	15%	21% ^b
Not at all useful	3%	2%	2%	Notify me as often as conditions change. This could mean receiving	460/	42 %	41%
Net: Bottom 2 Box	5%	4%	6%	multiple notifications per day.	46 %	42 %	41%

...approximate start and end time of the PSPS outage.

	De- Energized	Notified Only (B)	Not Notified (C)
Net: Top 2 Box	84%	85%	88%
Extremely useful	57 %	58%	59%
Very useful	27%	27%	28%
Somewhat useful	12%	12%	11%
Not very useful	1%	2%	1%
Not at all useful	2%	3%	1%
Net: Bottom 2 Box	4%	4%	2%

A closer look at Business customers' experiences during PSPS events and desired support actions

Almost half of those who experienced a PSPS event were UNAWARE that their business's power would be shut off.

Those with prior knowledge of the event were largely made aware via email, compared to Residential customers who relied heavily on text messages for awareness.

AWARE OF POWER BEING SHUTOFF PRIOR TO PSPS EVENT



Only 46% of those who experienced PSPS events thought it was necessary to keep the community safe.

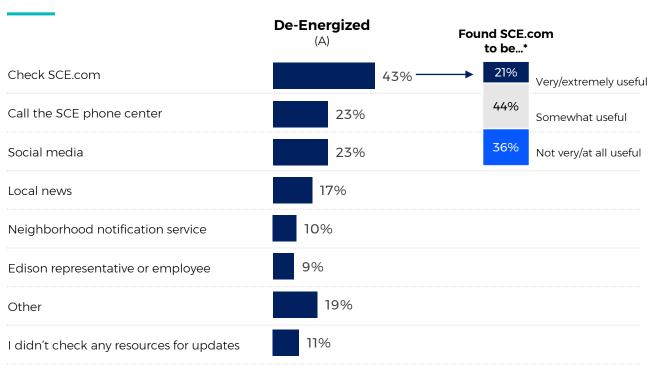
SOURCES OF PSPS EVENT AWARENESS

	De-Energized (A)
Email	43%
Text message	17%
Recorded phone message	17%
Local news	17%
Social media	9%
Neighborhood notification service	9%
Edison representative or employee	9%
Office building notification service	2%
Other coworkers	2%
Others who work in my office building	0%
Other	11%
I don't remember	4%

Customers mostly checked the SCE site for updates during PSPS events. However, only a fifth of site visitors found the information on the site highly useful.

Utilization of SCE's community resources was low during recent PSPS events.

WHERE CUSTOMERS WENT FOR UPDATES DURING PSPS EVENT

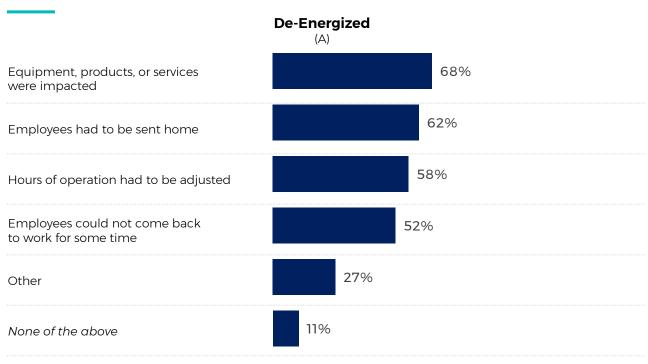


VISITATION OF SCE RESOURCES DURING PSPS EVENT



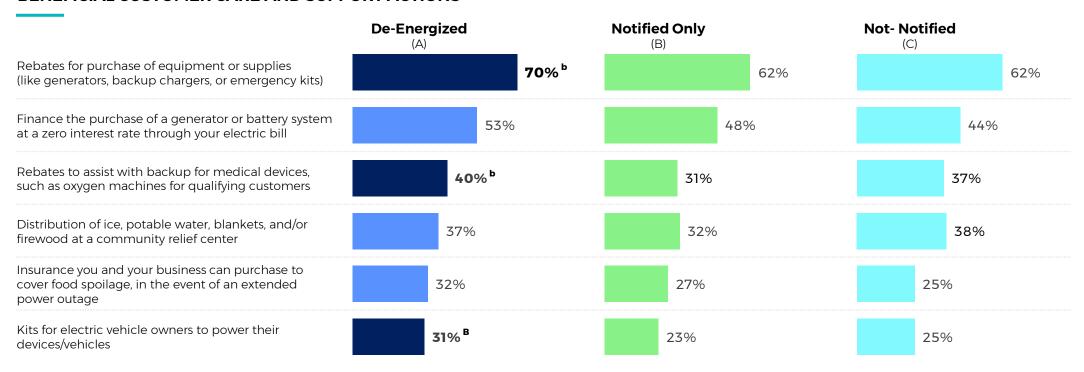
PSPS events mainly disrupted business operation (equipment, products, or services) and employee schedules.

EFFECTS OF PSPS EVENT(S) ON BUSINESSES



Rebates for purchase of equipment or supplies are the most beneficial PSPS customer care actions, especially to those who experienced an event.

BENEFICIAL CUSTOMER CARE AND SUPPORT ACTIONS



A closer look at PSPS messaging

Of the Business customers who can recall SCE's wildfire mitigation programs, very few can name PSPS top-of-mind.

Those working in non-high risk areas have the lowest awareness of SCE's efforts.

UNAIDED AWARENESS OF SCE'S WILDFIRE MITIGATION PROGRAMS

	De-Energized (A)	Notified Only (B)	Not Notified (C)	Not in High-Risk Area (D)
NET: Cutting Power / PSPS	25 % ^D	42 % ^{ACD}	20%	14%
General power outages or shutoffs	13%	22 % ^{ACD}	14%	10%
Public Safety Power Shutoffs / PSPS	8%cp	4 % ^D	1%	1%
Cutting power during high winds	4%	13% ^{ACD}	4%	1%
Planned outages / blackouts	2%	6% ^{acd}	2%	2%
Vegetation Management	10%	18% ^{ACD}	8%	7 %
Power Line Maintenance	9% ^D	13% ^{CD}	4%	2%
Other	10%	14%	10%	9%
Not aware of any SCE wildfire mitigation programs	46%	43%	58% ^{AB}	65% ^{AB}

Business customers working in high-risk areas have high aided awareness of PSPS, with the majority becoming informed through TV or radio news reports.

Both Business and Residential customers rely most on TV or radio news reports for finding out about PSPS.

PROGRAM AWARENESS

	De-Energized (A)	Notified Only	Not Notified (C)	Not in High-Risk Area
Unaided PSPS Awareness	8% ^{CD}	4% ^D	1%	1%
Aided PSPS Awareness	86% ^{CD}	85% ^{CD}	75%	69%

SOURCES OF PSPS AWARENESS

TV or radio news report	48%	57%	54%	57%
A letter in the mail from SCE	27%	39% ^{AcD}	29%	27%
An email from SCE	25% ^D	37 % ^{ACD}	19%	13%
Your power was shut off	23% ^{CD}	16% ^{CD}	6%	7 %
Online news report	23%	24%	19%	21%
Word of mouth (e.g., friends/family)	18%	22%	16%	21%
A telephone call from SCE	17 % ^{CD}	16% ^{CD}	6%	7 %
A text message from SCE	16% ^{CD}	17 % ^{CD}	6%	7 %
Social media post	14%	14%	12%	11%
SCE website	12%	15% ^{Cd}	7 %	8%
Edison representative or employee	10% ^d	5%	7 %	4%
Advertising on TV, radio, or online	7 %	15% ^A	20% ^A	15% ^A
Billboards	1%	0%	1%	2%

About half of Business customers are aware of PSPS advertising. However, current messaging is not particularly effective at helping companies create a plan, especially for de-energized customers.

EFFECTIVENESS OF ADVERTISING FOR...

...communicating their efforts using advanced technology to mitigate the risk of wildfires.

	De- Energized (A)	Notified Only (B)	Not Notified	Not in High- Risk Area
Net: Top 2 Box	65 %	70%	59%	67 %
Very effective	14%	23%	21%	26% ^a
Somewhat effective	51%	47%	38%	41%
Neither effective nor ineffective	17 %	23%	27%	20%
Somewhat ineffective	4%	5%	9%	7 %
Not at all effective	13% ^{Bc}	3%	5%	7 %
Net: Bottom 2 Box	1 7 % ^b	8%	14%	13%

...helping you and your company create a safety preparedness plan.

De- Energized (A)	Notified Only (B)	Not Notified	Not in High- Risk Area
38%	46%	50%	49%
6%	19% ^A	18% ^A	16% ^a
32%	27%	32%	33%
23%	35% ^a	26%	30%
10% ^c	8%	3%	3%
29% ^B	11%	21% ^B	18%
39 % ^{BcD}	19%	24 %	21%

AWARENESS OF PSPS ADS





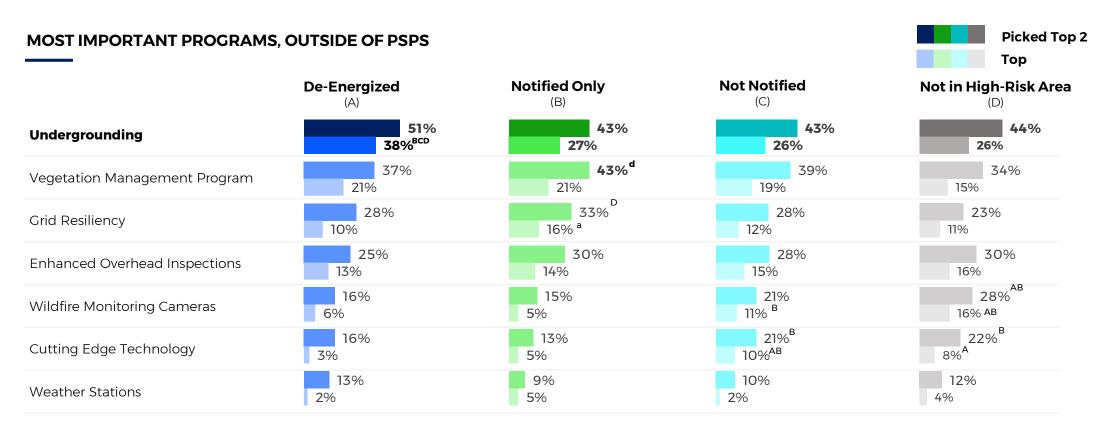






Like Residential customers, Business customers find undergrounding, grid resiliency, and vegetation management to be the most important wildfire prevention programs outside of PSPS.

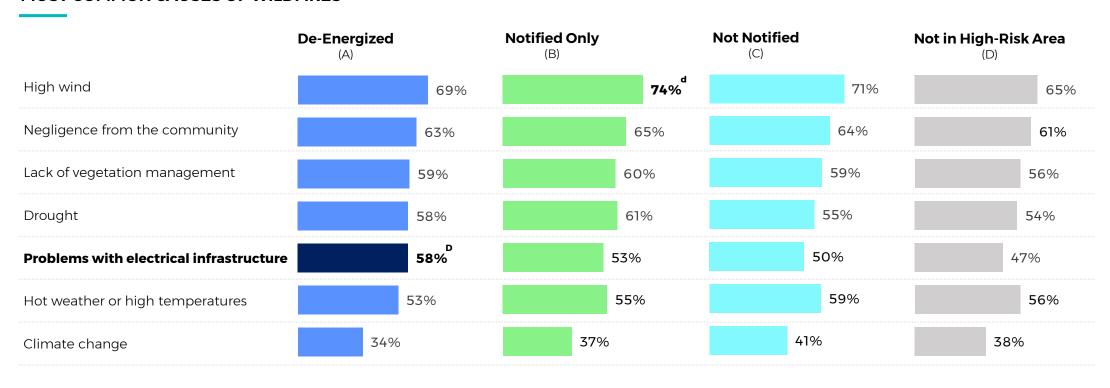
Undergrounding is particularly important for de-energized customers.





High wind and negligence from the community are believed to be some of the more common causes of wildfires.

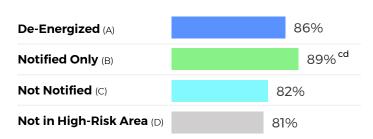
MOST COMMON CAUSES OF WILDFIRES



De-energized or Notified Only customers are more likely to have taken measures to prepare for wildfires. Almost half of these customers feel confident in their wildfire preparation.

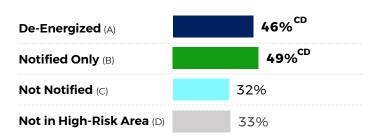
THREAT OF WILDFIRES SERIOUSNESS

(Net: Top 2 Box - Extremely/Very Serious)



LEVEL OF WILDFIRE PREPAREDNESS

(Net: Top 2 Box - Extremely/Very)

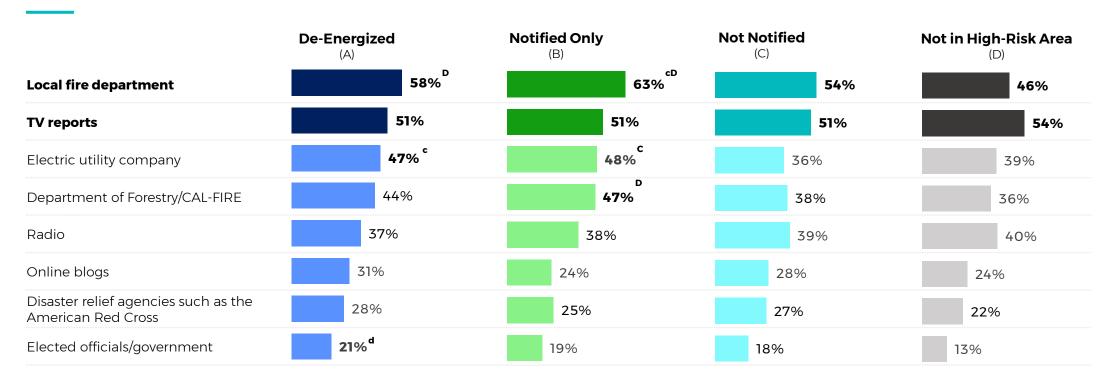


MEASURES TAKEN AT HOME TO PREPARE FOR WILDFIRES

	De-Energized	Notified Only	Not Notified	Not in High- Risk Area (D)
Purchased fire extinguishers	81%	77%	77%	76%
Trimmed/cut the vegetation at my business	61% ^{CD}	64% ^{CD}	47%	41%
Signed up for emergency alerts from electric utility company	57% ^D	56% ^D	51%	42%
Planned an evacuation route	57% ^{CD}	56% ^{CD}	34%	28%
Made an emergency kit for my business	51% ^D	47% ^D	44%	36%
Purchased a backup generator	49% ^{BCD}	29% ^D	22%	20%
Signed up for emergency alerts from the county/state	46% ^{CD}	44% ^{CD}	25%	18%
Signed up for emergency alerts from the Fire Department	37% ^{CD}	38% ^{CD}	24%	19%
Researched online about preparedness strategies	27% ^D	25% ^D	19%	16%
Received training on wildfire preparation measures	20% ^D	21% ^{cD}	14%	9%
You have not taken any measures to prepare for wildfires	2%	5%	10% ^{Ab}	13% ^{AB}

Business customers identify the local fire department and TV reports to be the most useful sources of wildfire safety information, similarly to Residential customers.

USEFUL SOURCES OF WILDFIRE SAFETY INFORMATION



Customers hold multiple entities responsible for preventing and protecting against wildfires, with local fire departments seen as the most responsible and most active.

ORGANIZATIONS "	"FOR PROTECTING AGAINST WILDFIRES

	"RESPONSIBLE"				"ACTUALLY A			
	De-Energized	Notified Only	Not Notified (C)	Not in High- Risk Area ^(D)	De-Energized	Notified Only	Not Notified (C)	Not in High- Risk Area (D)
Local fire department	66%	66%	64%	63%	70 % ^{cD}	68% ^D	60%	52 %
Electric utility company	56%	53%	61%	55%	60% ^{cD}	59% ^{cD}	49%	41%
Department of Forestry/CAL-FIRE	58%	63%	64%	60%	59%	54%	52%	51%
Private citizens/homeowners	64%	67%	64%	61%	48% ^D	48% ^D	41%	35%
Local government	53%	58%	59%	59%	44% ^D	38%	41% ^d	31%
State government	58%	59%	58%	60%	43%	35%	37%	35%
National government	35%	39%	40%	40%	25%	21%	21%	18%
Average # of responses	4.0	4.1	4.2	4.0	3.5 ^{cD}	3.2 ^D	3.0	2.7



Employing a uniform messaging strategy will benefit both Residential and Business customers.

The sentiments and attitudes of Business customers largely mirrors those of Residential customers when it comes to PSPS, so using a unified strategy to spread information to both audiences will work well, in terms of building awareness of the program as well as communication during events.

RECOMMENDTIONS

- ▶ To build awareness of the program, partner with local TV stations to highlight stories of SCE's wildfire mitigation efforts. The primary source of program awareness across customers is TV, so leveraging that platform to distribute information to both Residential and Business customers will reach many. This is a good platform to communicate efforts related to undergrounding, grid resiliency, and vegetation management as well all programs that are important across customers.
- ▶ To communicate during events, include specific information related to duration of event and location-specific information. Business customers want to be armed with as much information as possible about the time and duration of an event, as well as information that is pertinent to their specific location.
- ▶ After events, consider providing rebates for equipment/supply purchases. Rebates for equipment and supply purchases (like generators, backup chargers, or emergency kits) are the number-one choice for preferred customer care actions, for both businesses and households.

Provide additional assistance when it comes to Business preparedness surrounding events.

Mirroring De-Energized Residential customers, De-Energized Business customers have a very poor view of PSPS and SCE as a result of having their power cut off. Staggeringly, nearly half of Business customers were UNAWARE that their company's power was going to be shut off prior to the event, so there is a crucial communication issue to solve with this audience.

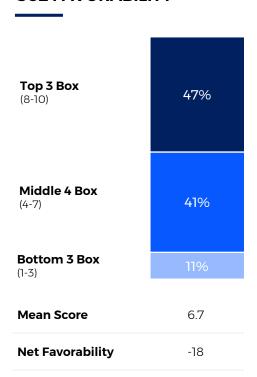
RECOMMENDTIONS

- ▶ Leverage secondary awareness channels to boost awareness of the program in general and communicate updates during events. De-Energized customers are primarily learning about upcoming PSPS events through email. Reinforce these email messages with text messages and recorded phone messages to business's point people.
- ▶ Be particularly attentive when it comes to relaying time information to Business customers: Business customers require even more advanced notice when it comes to PSPS alerts than do Residential customers, with many thinking that the current cadence of alerts does not allow them enough time to prepare their company's operations and employees appropriately.
- ▶ Craft specific messaging that helps businesses prepare for potential events. Current PSPS messaging is not seen as particularly helpful in helping businesses create a safety preparedness plan, especially among De-Energized customers. Consider specific communications aimed at businesses to help them understand the need for the PSPS practice, as well how they can best prepare for the future.



How do De-Energized customers feel about SCE?

SCE FAVORABILITY



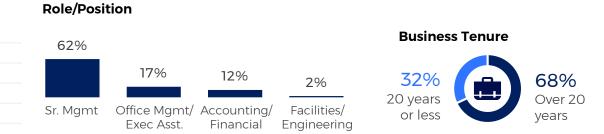
FEELINGS TOWARD SCE

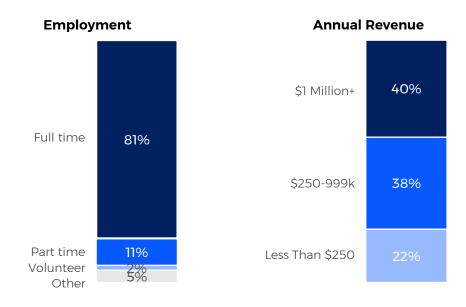
	Mean Score	Top 3 Box (8-10)	Middle 4 Box (4-7)	Bottom 3 Box (1-3)	Net Score (9-10 minus 1-6)
Is committed to restoring power to customers affected by wildfires	7.0	51%	35%	14%	-1
Actively works with first responders to keep communities safe during wildfires	6.8	49% 35%		16%	-9
Takes proactive measures to protect the electricity grid from wildfires	66	44% 40%		16%	-17
Takes proactive measures to protect communities from the risks of wildfires	6.5	43%	38%	18%	-20
Supports nonprofits and communities affected by wildfires	5.7	37%	39%	24%	-39
Shows care and concern for its customer	rs 6.0	34%	41%	24%	-31
Is a company you trust to act in the best interest of its customers	5.8	30%	47%	23%	-35

Base: Total Respondents (De-Energized n=134); Q1, Q12

Profile of De-Energized Customers

FIRM-O-GRAPHICS Industry Real Estate 13% Manufacturing 7% Gender Hospitality 6% Retail 6% Architecture/Engineering 4% Automotive 4% 4% Insurance Charity/not for profit organization 3% Finance/Accounting 3% **Own or Lease** Transportation and warehousing 3% Education 2% 38% 61% Government 2% Lease Own IT/Technology 2% Law 2% Design 1% Food/Restaurant 1% 66.7 Health (e.g., nutrition, massage therapy) 1% Avg. # of Full-time Marketing/Public Relations/Advertising | 1% employees





Publishing

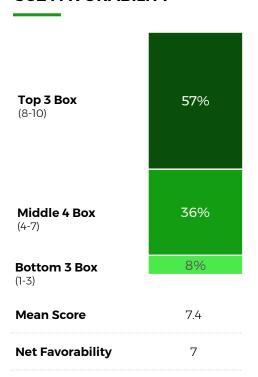
Other

1%

33%

How do Notified customers feel about SCE?

SCE FAVORABILITY



FEELINGS TOWARD SCE

	Mean Score	Top 3 Box (8-10)	Middle 4 Box (4-7)	Bottom	13 Box (1-3)	Net Score (9-10 minus 1-6)
Is committed to restoring power to customers affected by wildfires	7.9		66%	29%	5%	25
Actively works with first responders to keep communities safe during wildfires	7.8	(64%	27%	9%	22
Takes proactive measures to protect communities from the risks of wildfires	7.3	53%	6	40%	8%	1
Takes proactive measures to protect the electricity grid from wildfires	7.4	53%	6	42%	6%	6
Shows care and concern for its customers	6.9	46%		44%	10%	-9
Is a company you trust to act in the best interest of its customers	6.9	45%		45%	10%	-10
Supports nonprofits and communities affected by wildfires	6.9	43%		48%	9%	-9

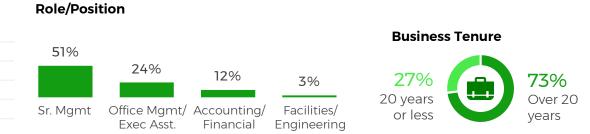
Base: Total Respondents (Notified n=200); Q1, Q12

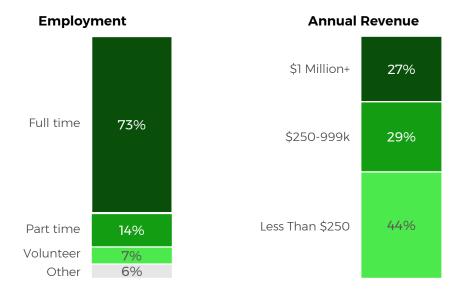
Profile of Notified Customers

FIRM-O-GRAPHICS Industry Real Estate 9% Charity/not for profit organization 8% Gender Retail 8% Food/Restaurant 6% Education 5% Manufacturing 5% Automotive 4% Consulting/Freelancing 3% Architecture/Engineering 2% **Own or Lease** Arts and entertainment 2% Beauty (e.g., cosmetology, salon ownership) 2% 32% 59% Finance/Accounting 2% Lease Own Government 2% Health (e.g., nutrition, massage therapy) 2% 2% Insurance Marketing/Public Relations/Advertising | 2% Design 1% 26.2 Hospitality 1% Avg. # of Full-time IT/Technology 1% employees Publishing 1% 1%

Transportation and warehousing

36%

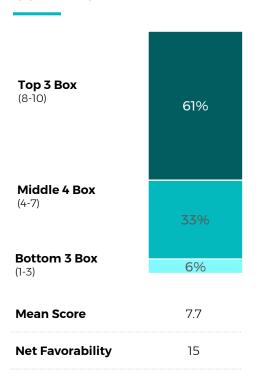




Other

How do Unnotified customers feel about SCE?

SCE FAVORABILITY



FEELINGS TOWARD SCE

	Mean Score	Top 3 Box (8-10)	Middle 4 Box (4-7)		Bottom 3	3 Box (1-3)	Net Score (9-10 minus 1-6)
ls committed to restoring power to customers affected by wildfires	8.4		76%		22%	2 %	40
Actively works with first responders to keep communities safe during wildfires	8.4		73%		27%	0 %	33
Takes proactive measures to protect communities from the risks of wildfires	7.7		62%		35%	4 %	11
Takes proactive measures to protect the electricity grid from wildfires	7.6	5	59%		37 %	4%	9
Supports nonprofits and communities affected by wildfires	7.6	55	5%	3!	9%	5%	13
Shows care and concern for its customers	7.3	53	%	39	%	8%	4
Is a company you trust to act in the best interest of its customers	7.2	529	%	38%	,	10%	-1

Base: Total Respondents (Not notified n=170); Q1, Q12

Profile of Unnotified Customers

FIRM-O-GRAPHICS Gender

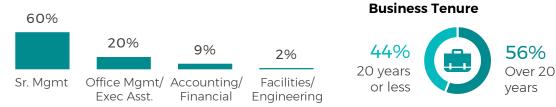
Own or Lease

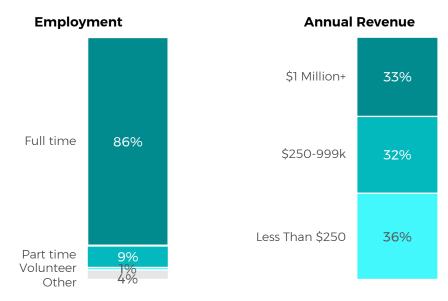






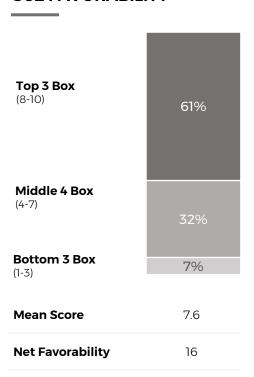
Role/Position





How do customers not in high-risk areas feel about SCE?

SCE FAVORABILITY



FEELINGS TOWARD SCE

	Mean Score	Top 3 Box (8-10)	Middle 4 E (4-7)	Зох	Bottom	3 Box (1-3)	Net Score (9-10 minus 1-6)
Is committed to restoring power to customers affected by wildfires	8.2		69%		28%	3%	34
Actively works with first responders to keep communities safe during wildfires	7.8		67%		28%	5%	19
Takes proactive measures to protect the electricity grid from wildfires	7.4	5	58%		32%	10%	10
Takes proactive measures to protect communities from the risks of wildfires	7.4	5	6%		38%	7 %	9
Shows care and concern for its customers	7.3	53	5%	3	9%	8%	2
Is a company you trust to act in the best interest of its customers	7.0	519	%	40	%	9%	-9
Supports nonprofits and communities affected by wildfires	6.7	41%		48%		11%	-18

Profile of Customers Not in High-Risk Areas

FIRM-O-GRAPHICS

Gender



Own or Lease





Industry



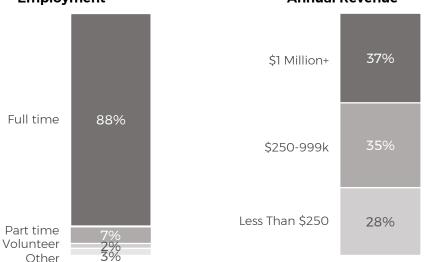
Role/Position



Business Tenure



Employment Annual Revenue





Residential and Business customers of the same segment share many of the same attitudes and sentiments toward PSPS and SCE.

AMONG DE-ENERGIZED CUSTOMERS

SCE NET FAVORABILITY SCORE Business Residential De-Energized -19 **Notified Only Not Notified** Not in High-16 25 Risk Area (D)

AMONG DE ENERGIZED COSTOMERS									
FEELINGS TOWARD SCE (Top 3 Box, 8/9/10)	Business De-Energized	Residential De-Energized		OF PSPS	PRACTIO				
Committed to restoring power to customers affected by wildfires	51%	50%	Very positive	7%	9%				
Actively works with first responders to keep communities safe during wildfires	49%	51%	Positive	33%	30%				
Takes proactive measures to protect the electricity grid from wildfires	44%	44%			260/				
Takes proactive measures to protect communities from the risks of wildfires	43%	41%	Neutral	29%	26%				
Supports nonprofits and communities affected by wildfires	37%	33%	Negative	17%	20%				
Shows care and concern for its customers	34%	37%	Very negative	14%	15%				
A company you trust to act in the best interest of its customers	30%	33%	D	Business e-Energized	Resider De-Ener				

