

Chelan County Public Utility District
Public Perception Tracking Study
Executive Summary Report
October 2006

Prepared by:

Robinson Research
2503 East Illinois
Spokane, Washington 99207
(509) 489-4361
Fax: (509) 210-0311
E-mail: billr@robinson-research.com

Table of Contents

Statement of Methodology 3
Brief History of PUD’s Image Tracking 4
Detailed Observations 5

Statement of Methodology

Robinson Research was commissioned by Chelan County Public Utility District (PUD) to conduct a telephone survey with customers. The overall purpose of this study was to evaluate and track public attitudes regarding the PUD.

This is the eleventh wave of the study. The first wave was conducted in 1989, the second in 1990, the third in 1992, the fourth in 1995, the fifth in 1997, the sixth in 1998, the seventh in 1999, the eighth in 2000, the ninth in 2001, the tenth in 2002, and the eleventh in 2006. For this wave, the telephone interviews were conducted at our facility in October of 2006.

In all replications of the study, 400 interviews were conducted with Chelan County PUD customers. All respondents were screened for the following: To be the head of the household, to not be employed in market research, advertising, public relations or for a utility, to not have participated in a telephone survey on the subject of energy or energy utilities in the past year, and to live in Chelan County.

No fewer than fifteen percent (15%) of the interviews were monitored in their entirety, and an additional ten percent (10%) were called back by a supervisor for verification of key points of the data. Interim trial runs of the data were cross-tabulated by interviewer as a quality assurance procedure.

A total of 400 telephone interviews were completed. A 400-sample survey has a margin of error of +/- 4.9% percent, which means that, in theory, results have a ninety-five percent (95%) chance of coming within +/- 4.9 percentage points of results that would have been obtained if all PUD residential customers had been interviewed.

Questions regarding this study may be directed to:

William D. Robinson
President
Robinson Research
2503 East Illinois
Spokane, Washington 99207
(509) 489-4361
Fax: (509) 210-0311
E-mail: billr@robinson-research.com

A Brief History Of Chelan County PUD's Image Tracking

This study has roots in a statewide survey conducted for the Washington State PUD Association in 1984. Bill Robinson, President of Robinson Research worked on that study as Vice President of Market Trends in Seattle WA. In the benchmark 1984 study, Chelan County PUD scored higher than the statewide average on every tested service characteristic. Since 1984, Chelan County PUD has commissioned eleven waves of the study. While the core of the tracking questionnaire has remained intact throughout the eleven waves, there have been some modifications to the questionnaire in each wave of the study.

Throughout the 1990s, Chelan County PUD conducted six replications of this study and overall customer perceptions remained very positive. The 2001 and 2002 waves showed deterioration of the PUD's image. Whereas the PUD declined to track customer satisfaction in 2003, 2004 and 2005, we have no solid tracking data, but we do know that during this time span, the PUD was often on the defensive in the local media and it would be reasonable to assume that its image was negatively impacted in that era.

The 2006 wave clearly shows across-the-board improvement over the 2002 wave and in many cases, over the cumulative multi-wave average. This conclusion is supported by observations of the responses to several key aided questions as well as by unaided comments in other questions. Any reasonable interpretation of these data would lead to the conclusion that Chelan County PUD has done a remarkable job of improving its image among its customers.

Q.1 To the best of your knowledge, which of the following home heating fuels costs less in Chelan County: Electricity, wood, or natural gas?

This aided question was asked of all 400 respondents. Participants were read a randomized list from which to select a response. This was not asked in the 1999, 1990 and 1989 waves.

Seventy-eight percent said that electricity was cheapest, which was significantly higher than the seven-wave average. Only one in twenty-five (4%) said natural gas was the least expensive fuel source and this is considerably lower than the previous seven-wave average of ten percent. The table below shows the distribution of responses from each wave.

Fuel Sources	1992	1995	1997	1998	2000	2001	2002	2006
Electricity	56%	57%	69%	62%	66%	64%	65%	78%
Wood	23%	24%	14%	14%	19%	21%	20%	14%
Natural gas	11%	12%	9%	14%	8%	7%	8%	4%
They cost the same	1%	1%	2%	1%	1%	1%	1%	1%

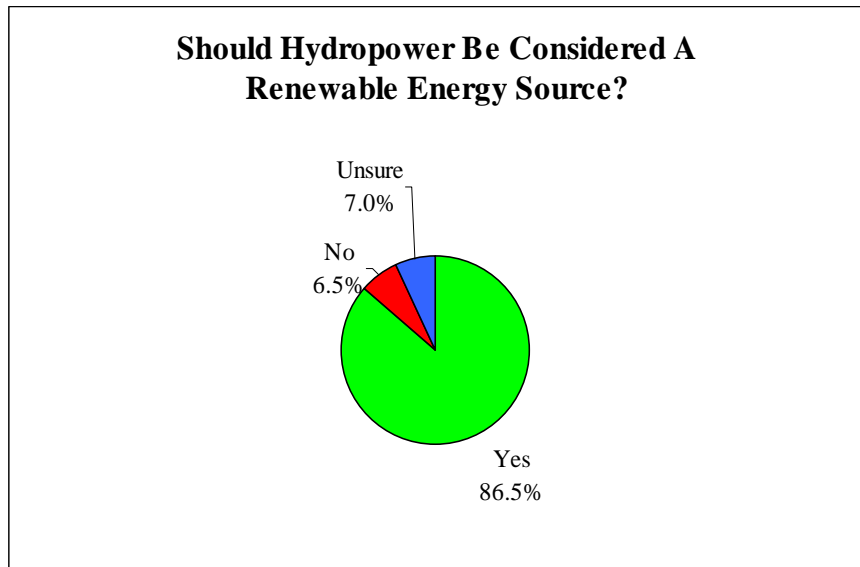
Eighteen to thirty-four year olds were less likely than average to cite electricity as the least expensive and more likely to state that wood was the least expensive fuel source. As in previous waves, participants from the Leavenworth sampling were more likely than average to say that wood was least expensive.

Q.2 Should hydropower be considered a renewable energy source along with wind and solar, or not?

This question was not asked in any previous wave.

An overwhelming majority of respondents considered hydropower to be a renewable energy source.

Perception of hydropower as a renewable source of energy increased steadily as education and income levels rose.



Q.3 To the best of your knowledge what are the issues and concerns facing Chelan County PUD over the next several years?

*All 400 respondents were asked this unaided question. This was not asked in 1999.
(Note: Do not attempt to add similar comments as multiple responses were allowed)*

Fifteen percent of respondents stated “keeping rates low” as the top issue facing the PUD over the next several years, but this is considerably lower than the nine-wave average (24%). One in twenty-five (4%) mentioned “salmon recovery” as an issue or concern which is lower than the nine-wave average of fourteen percent.

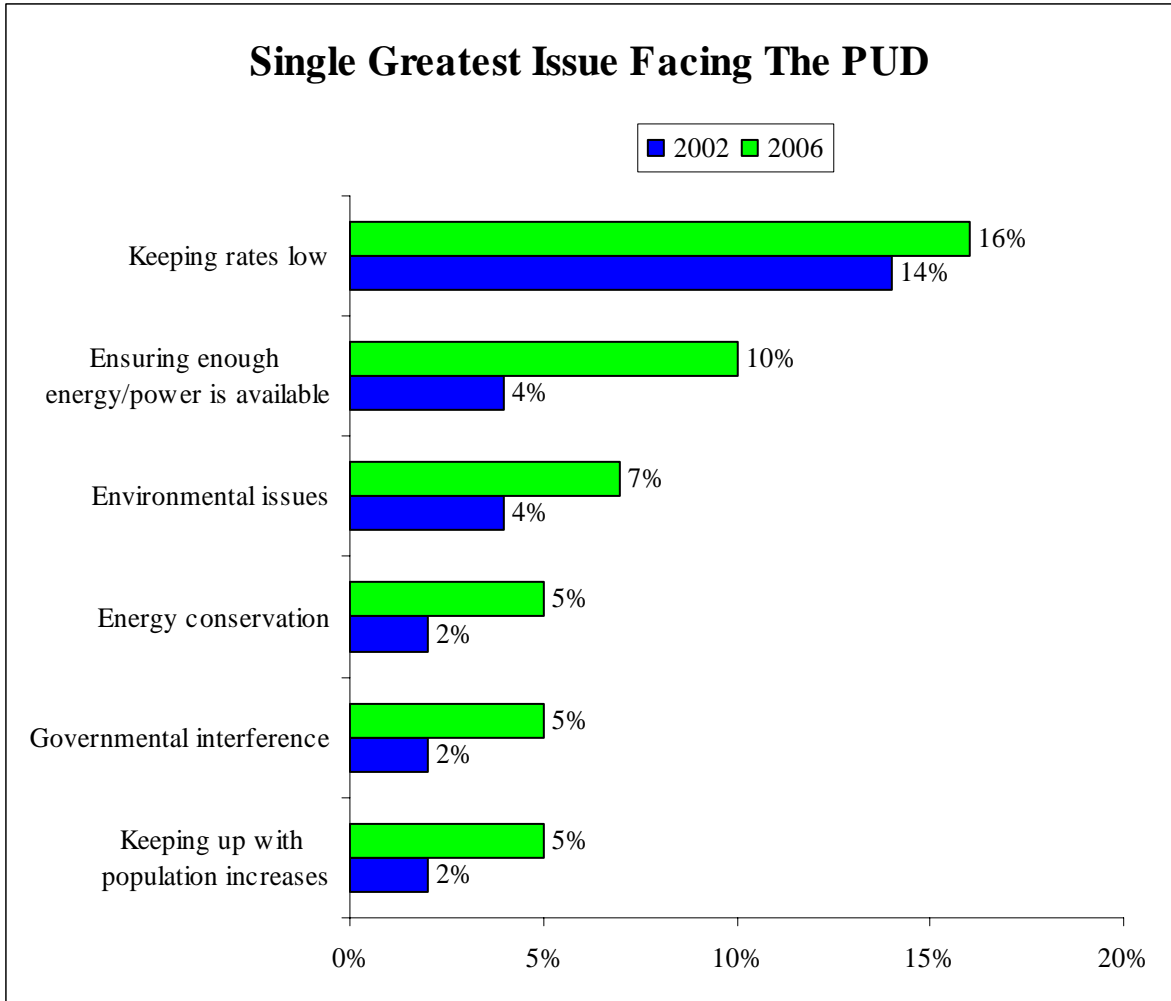
Issues	1989	1990	1992	1995	1997	1998	2000	2001	2002	2006
Keeping rates low	29%	20%	32%	33%	19%	23%	25%	25%	12%	15%
Ensuring enough power to create electricity	21%	4%	16%	5%	7%	6%	5%	7%	6%	11%
Dam use/relicensing	-	-	-	-	-	18%	28%	15%	10%	7%
Money management	-	10%	13%	7%	5%	4%	1%	9%	6%	6%
Energy conservation	6%	6%	7%	4%	3%	3%	4%	5%	3%	6%
Environmental issues	9%	11%	41%	9%	8%	8%	6%	2%	6%	6%
Gaining back public trust/credibility	-	-	-	-	-	-	-	3%	11%	5%
Salmon recovery	-	-	-	38%	16%	24%	25%	16%	9%	4%
Poor management/leadership	-	-	-	-	-	-	-	7%	5%	4%
Finding alternative power sources	-	4%	3%	2%	3%	1%	1%	7%	2%	4%
Keeping up with population/industry increases	14%	11%	20%	13%	15%	6%	3%	7%	1%	4%
Governmental interface	-	-	-	-	1%	4%	3%	1%	2%	3%
Deregulation	-	-	-	2%	25%	21%	3%	1%	3%	2%
Breaching dams	-	-	-	-	-	-	-	2%	4%	2%
Lack/availability of water	-	-	-	-	-	-	-	11%	4%	1%
Selling electricity to other areas	3%	3%	5%	5%	5%	6%	2%	8%	3%	1%

Responses spanned all tested subsets quite evenly.

Q.4 In your opinion, what is the single greatest issue facing the PUD in the future?

All 400 participants were asked this unaided question.

One-in-five (19%) respondents could/would not name the greatest issue facing the PUD. No single issue was cited by more than one-in-six (16%). The graph on the following page shows the distribution of responses.



There were no discernible correlations between responses to this question and other survey variables.

Q.5 – Q.6 Series

I am going to read you two statements, and I would like to know the degree to which you agree or disagree with each. Please rate each statement on a scale with one meaning strongly disagree and seven meaning strongly agree.

- Q.5 Electric rates are reasonable when compared to the increase in other items.**
- Q.6 In terms of overall customer service, my electric utility is doing an excellent job.**

While neither statement received a mean score that was significantly higher than the ten-wave average, there was considerable improvement over the past two waves.

The following table shows the distribution of mean (average) scores for each wave.

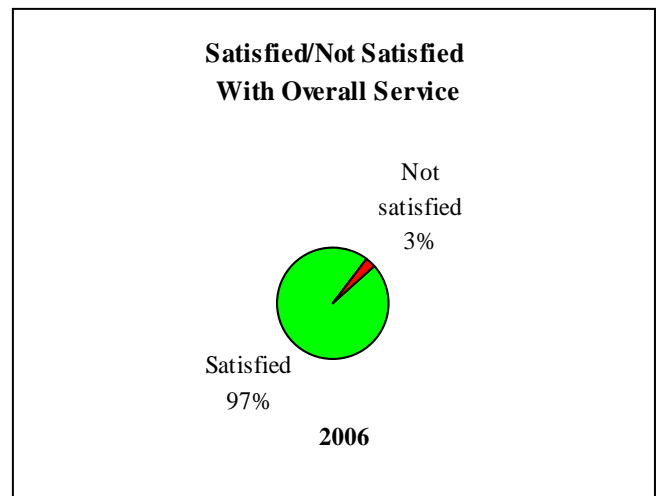
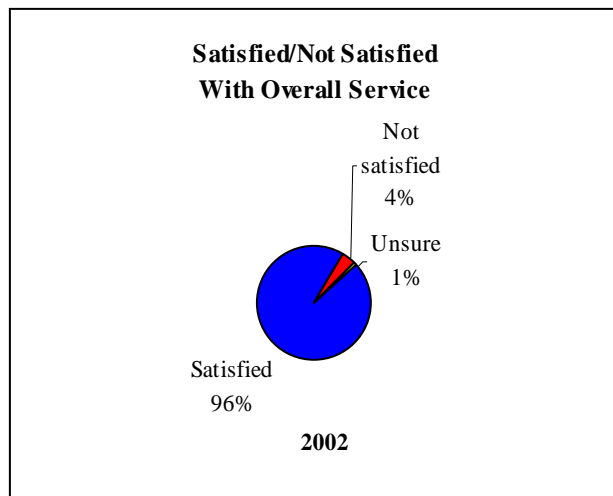
Statements	1989	1990	1992	1995	1997	1998	1999	2000	2001	2002	2006
Electric rates reasonable	5.99	6.45	5.87	5.62	5.84	5.78	5.81	5.92	5.53	5.66	6.01
Utility providing excellent customer service	6.55	6.51	6.42	6.03	5.99	6.00	6.04	6.22	5.82	5.76	6.17

The mean score for “utility providing excellent customer service” decreased as education levels increased.

Q.7 Since you have been a customer, would you say that you have been satisfied or have not been satisfied with the overall service you have received from Chelan County PUD?

This question was asked of all respondents. This was asked for the first time in 1998.

Ninety-seven percent indicated that they were satisfied. This was equal to the previous five-wave average (97%).



All of the forty-five respondents from the Chelan sampling, said that they were satisfied.

Q.8 – Q.17 Series

I am going to read you a list of words or phrases that could describe Chelan County PUD. After I read each one, please tell me whether or not you believe the phrase describes the PUD.

- Q.8 Community minded**
- Q.9 Knowledgeable about energy**
- Q.10 Innovative**
- Q.11 Environmentally responsible**
- Q.12 Friendly**
- Q.13 Having good communication with the public**
- Q.14 Hard working**
- Q.15 Professional**
- Q.16 Believable in what they say**
- Q.17 Efficient**

This series was asked of all respondents in a randomized manner.

In 2006, agreement with the ten positive statements were all higher than the ten-wave average. The following table shows the percentages agreeing for each wave.

Descriptions	1989	1990	1992	1995	1997	1998	1999	2000	2001	2002	2006
Professional	87%	83%	84%	93%	94%	93%	93%	93%	92%	85%	94%
Knowledgeable about energy	87%	83%	86%	95%	96%	94%	94%	94%	94%	93%	93%
Friendly	87%	86%	85%	91%	92%	92%	94%	92%	91%	88%	91%
Good communication	80%	78%	78%	81%	86%	86%	83%	86%	75%	59%	90%
Community minded	80%	77%	83%	87%	88%	90%	85%	84%	85%	77%	90%
Environmentally responsible	78%	75%	76%	88%	87%	86%	86%	87%	89%	84%	89%
Hard working	73%	71%	68%	79%	78%	80%	74%	76%	80%	73%	84%
Efficient	81%	82%	79%	82%	83%	86%	82%	87%	79%	72%	84%
Innovative	56%	61%	59%	62%	64%	62%	63%	62%	73%	68%	81%
Believable	82%	69%	76%	75%	81%	85%	83%	83%	75%	52%	78%

Q.8 Community minded

With ninety percent responding affirmatively, this ranked fifth of the ten descriptors tested. The previous ten-wave average was eighty-three percent (83%).

Q.9 Knowledgeable about energy

With ninety-three percent responding affirmatively, this ranked second highest of the ten descriptors tested. Affirmative responses in this wave were slightly higher than the previous ten-wave average of ninety-one percent.

Q.10 Innovative

With eighty-one percent responding affirmatively, this statement ranked ninth of the ten tested statements, but was considerably higher than the ten-wave average of sixty-three percent.

Respondents in the 35-54 age subset and those with dependent children between the ages of 13-21 living in their household were somewhat more likely than average to respond affirmatively.

Q.11 Environmentally responsible

With eighty-nine percent responding affirmatively, this ranked sixth of the ten tested descriptors. This wave was equal to the highest ever tested, with a moderately higher percentage responding affirmatively than in the previous ten-wave average of eighty-three percent.

Responses spanned the tested subsets fairly evenly.

Q.12 Friendly

With ninety-one percent responding affirmatively, this ranked third of the ten tested descriptors. This was comparable to the eighty-nine percent shown in the previous ten-wave average.

Q.13 Having good communication with the public

With ninety percent responding affirmatively, this descriptor was tied for third among the ten tested. This wave was significantly higher than the seventy-nine percent previous ten-wave average and last wave's score of fifty-nine percent.

Those with less than a high school diploma were more likely than average to agree that this descriptor fits the PUD, while those in the post college subset were somewhat less likely than average to agree.

Q.14 Hard working

With eighty-four percent responding affirmatively, this descriptor ranked seventh of the ten tested and is the highest agreement elicited in the history of this study. This wave was nine percentage points higher than the eight-wave average (75%).

Respondents ages 18-34 were somewhat more likely than average to agree with this statement.

Q.15 Professional

With ninety-four percent responding affirmatively, this descriptor ranked first of the ten tested. The percentage of customers responding favorably was equal to the highest ever recorded.

Responses to this question spanned the tested subsets fairly evenly.

Q.16 Believable in what they say

With seventy-eight percent responding affirmatively, this descriptor was last among the ten tested, but still elicited higher agreement than the ten-wave average (76%).

Q.17 Efficient

With eighty-four percent responding affirmatively, this descriptor tied for seventh among the ten tested. This wave was three percentage points higher than the previous ten-wave average (81%).

Responses to this question correlated strongly with overall satisfaction.

Q.18 – Q.28 Series

Thinking specifically of Chelan County PUD, I would like you to tell me how well they perform in a variety of areas. Please use a scale of one to seven, with one meaning they perform poorly and seven meaning they perform very well.

- Q.18 Providing prompt restoration of electric service following an outage**
- Q.19 Charging reasonable electric rates**
- Q.20 Being involved in the community**
- Q.21 Providing good customer service**
- Q.22 Providing dependable and reliable electrical service**
- Q.23 Providing dependable and reliable wholesale fiber-optic system**
- Q.24 Providing dependable and reliable water/wastewater service**
- Q.25 Helping salmon survival in the region**
- Q.26 Providing a useful web site**
- Q.27 Providing good customer service on your most recent contact with the PUD**
- Q.28 Your overall assessment of the job Chelan County PUD is doing**

All respondents were asked this series.

The table on the following page shows the mean (average) scores for the attributes in descending order, beginning with the one rated highest in the 2006 wave.

Areas	1989	1990	1992	1995	1997	1998	1999	2000	2001	2002	2006
Reliable service	6.61	6.57	6.55	6.51	6.45	6.50	6.52	6.61	6.57	6.47	6.57
Good customer service on most recent contact	6.54	6.53	6.52	6.18	6.16	6.36	6.17	6.37	6.02	6.21	6.39
Prompt restoration of electricity	6.58	6.54	6.55	6.51	6.42	6.38	6.42	6.48	6.40	6.39	6.36
Good customer service	-	-	-	6.26	6.13	6.21	6.18	6.35	6.09	6.03	6.21
Reasonable rates	6.26	6.36	6.38	5.83	5.92	5.96	5.87	6.05	5.82	5.97	6.20
Reliable water/waste water system	-	-	-	-	-	-	-	-	-	-	6.08
Involved in community	6.03	6.09	5.98	5.90	5.88	5.80	5.81	5.88	5.75	5.69	5.98
Helping salmon survival	-	-	-	-	-	-	-	-	-	5.90	5.95
Providing a useful website	-	-	-	-	-	-	-	-	-	-	5.92
Reliable fiber-optic system	-	-	-	-	-	-	-	-	-	-	5.37
PUD overall	6.35	6.38	6.36	6.07	6.16	6.15	6.11	6.34	5.88	5.76	6.17

Q.18 Providing prompt restoration of electric service following an outage

With a mean score of 6.36, prompt restoration ranked third of the eleven tested in this series. The ten-wave average was 6.47.

Chelan customers gave higher than average ratings.

Q.19 Charging reasonable electric rates

With a mean score of 6.20, reasonable rates ranked fifth of the eleven in this series and was significantly higher than the 2002 wave. This was somewhat higher than the previous ten-wave average (6.04).

Positive perceptions increased as age and education levels increased.

Q.20 Being involved in the community

With a mean score of 5.98, community involvement ranked seventh of the eleven tested attributes. The previous eight-wave average was 5.87.

Those respondents who rated the PUD as poor or average were significantly less likely than average to give a favorable rating.

Q.21 Providing good customer service

This question was first asked in the 1995 wave.

With a mean score of 6.21, this attribute ranked fourth of the six in this series. The previous seven-wave average was 6.17.

Perceptions of customer service correlated strongly with overall perceptions of the PUD. Manson customers typically gave higher than average ratings. The number of respondents rating this attribute as a seven was substantially higher compared to the 2002 wave.

Q.22 Providing dependable and reliable electrical service

With a mean score of 6.57, this ranked highest of the eleven tested attributes. The eight-wave average was 6.54.

Responses spanned the tested subsets fairly evenly.

Q.23 Providing a dependable and reliable wholesale fiber-optic system

This is the first time this statement was asked.

With a mean score of 5.37 this statement ranked lowest of the eleven tested.

Those respondents who had a negative perception about the PUD were somewhat more likely than average to give this a lower rating.

Q.24 Providing dependable and reliable water/wastewater services

This is the first time this statement was asked.

With a mean score of 6.08 this statement ranked sixth of the eleven tested.

Those respondents in the \$20,000 to \$40,000 income range were significantly more likely than average to give a higher rating.

Q.25 Helping salmon survival in the region

This attribute was first tested in the 2002 wave.

With a mean score of 5.95 this statement ranked ninth of the eleven tested.

Those respondents who indicated natural gas was their main source for home heating were significantly more likely than average to give a favorable rating.

Q.26 Providing a useful web site

This is the first time this statement was asked.

With a mean score of 5.92 this statement ranked tenth of the eleven tested.

A majority (66%) of respondents stated they had ‘no experience with this,’ significantly higher than with any other question. As age decreased, so did the percentage of respondents stating ‘no experience.’

Q.27 Providing good customer service on your most recent contact with the PUD

With a mean score of 6.39 this statement ranked second. The ten-wave mean was 6.31.

Perceptions of customer service correlated strongly with overall perceptions of the PUD. Those respondents without a high school diploma were decidedly more likely than average to give a favorable rating.

Q.28 Your overall assessment of the job Chelan County PUD is doing

With a mean score of 6.17 this statement ranked sixth, which is comparable to the ten-wave average (6.16).

Those residing in the City of Chelan were significantly more likely than average to give a favorable rating. Those without high school diplomas were much more likely than average to give a favorable rating, while those respondents who attained post graduate education were somewhat less likely than average to give a favorable rating.

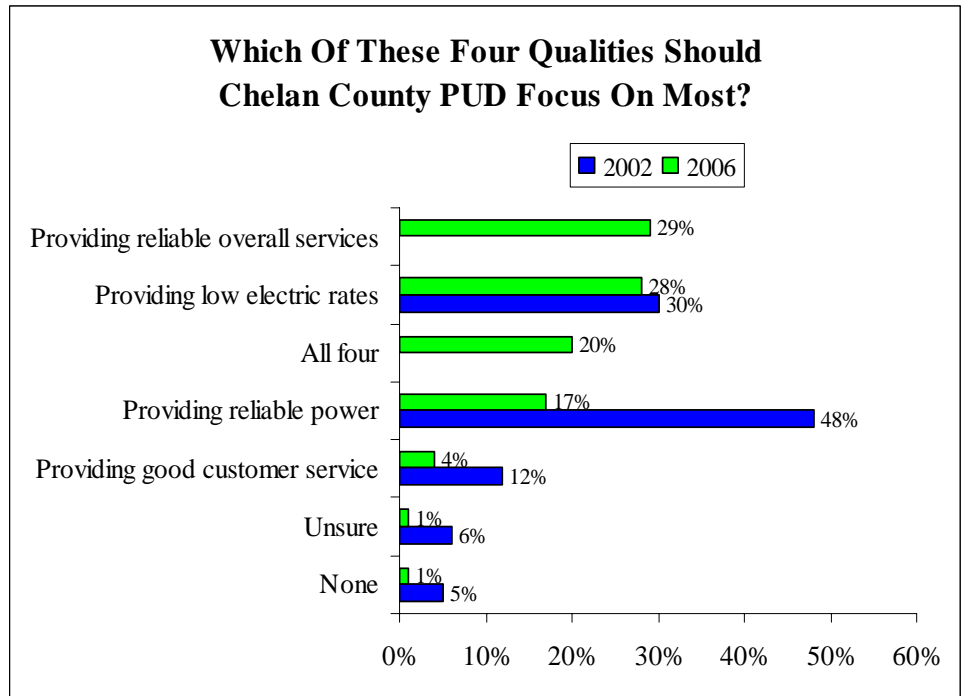
Q.29 Which of the following four qualities should Chelan County PUD focus on most?

- **Providing low electric rates**
- **Providing reliable power**
- **Providing good customer service**
- **Providing reliable overall utility services (including fiber optics, water, wastewater and electricity) for the people of Chelan County**

“Providing reliable overall services” was added to the questionnaire this wave.

Those planning on building (or having built) a new home in the next year were noticeably more likely than average, to state that ‘providing reliable overall services’ was the quality the PUD should focus on most.

Those without internet access were significantly less likely than average to select ‘providing reliable overall services’ as being the quality to focus on most.

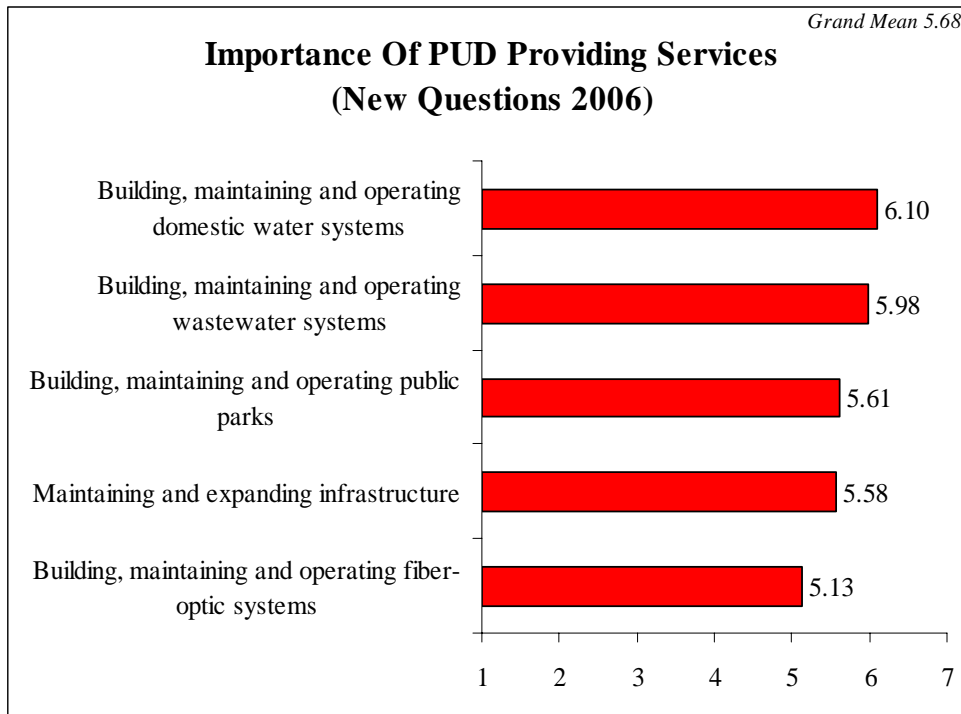


In addition to providing electricity, Chelan County PUD also provides other services. After I read each one, please indicate how important the service is by choosing any number on a seven-point scale with one being not at all important and seven being very important. The first one is...

- Q.30 Building, maintaining and operating public parks**
- Q.31 Building, maintaining and operating domestic water systems**
- Q.32 Building, maintaining and operating wastewater systems**
- Q.33 Building, maintaining and operating fiber-optic systems**
- Q.34 Maintaining and expanding infrastructure that allows new development**

This series had never been asked before this wave.

The graph on the following page, shows the importance ratings of the five endeavors.



Those who gave a poor assessment of the overall job the PUD was doing were somewhat more likely than average to give low ratings of importance on all of the tested statements.

Q.30 Building, maintaining and operating public parks

With a mean score of 5.61 this task ranked third of the five tested.

Those residing in the Leavenworth area, were significantly more likely than average to give a lower importance rating to this endeavor.

Respondents with children in the household were somewhat more likely than average to give a high importance rating to this endeavor.

Q.31 Building, maintaining and operating domestic water systems

With a mean score of 6.10 this endeavor ranked first.

Respondents in the 18-34 year old category, the 55+ age category and those building a home in the next ten years were all significantly more likely than average to give a higher rating.

Those living in the Leavenworth area were somewhat less likely than average to support this endeavor.

Q.32 Building, maintaining and operating wastewater systems

This task received a mean score of 5.98 and was second out of the five tested.

Those not registered to vote, renting their home, or building a new home in the next ten years were all significantly more likely than average to give a higher rating to this tested endeavor.

Q.33 Building, maintaining and operating fiber-optic systems

With a mean score of 5.13 this endeavor overwhelmingly elicited the lowest rating.

Those in the \$20,000 to \$40,000 income category were somewhat more likely than average to give a higher rating.

Q.34 Maintaining and expanding infrastructure that allows new development

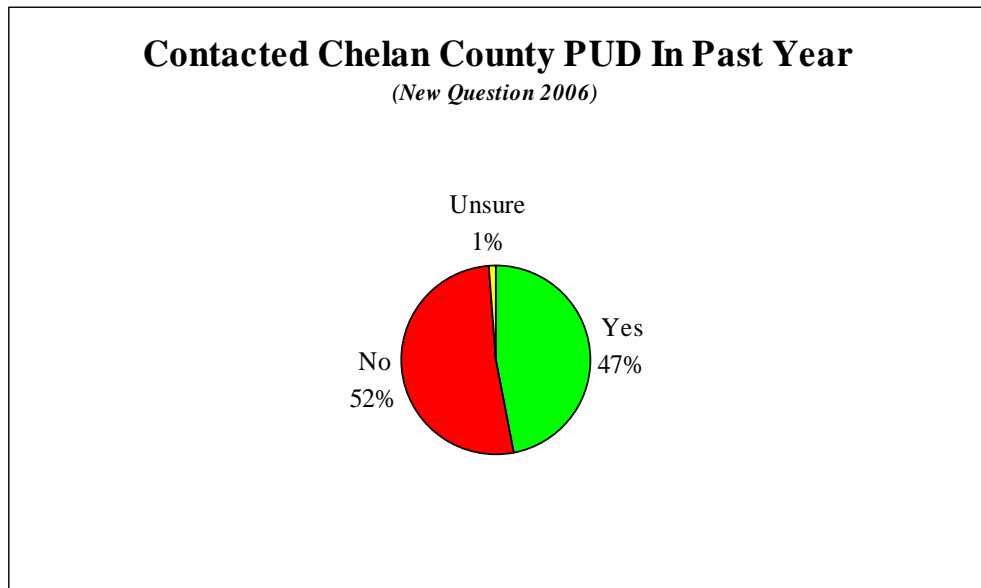
This task elicited a mean score of 5.58 and was the second lowest among the five statements tested.

Those supporting the continued build-out of the fiber-optic system were decidedly more likely than average to give a high rating.

Q.35 In the past 12 months, have you contacted Chelan County PUD for any reason?

This is the first wave in which this question was asked.

Those residing in the Manson area were somewhat more likely than average to have contacted the PUD in the past year.



Q.36 For what reasons have you recently contacted Chelan County PUD in the past twelve months?

This question was asked of only the 187 respondents who said they had contacted the PUD in the past year.

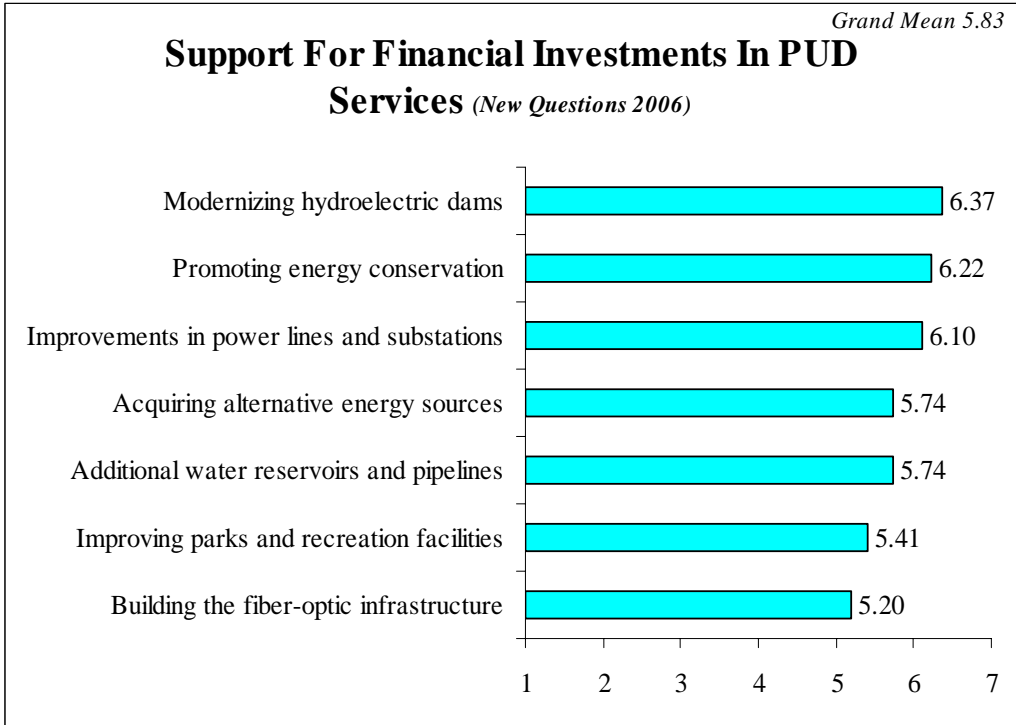
Reasons	1989	1990	1992	1995	1997	1998	1999	2000	2001	2002	2006
Request for service/information	27%	24%	22%	19%	15%	20%	28%	16%	15%	24%	18%
Billing concern	3%	4%	2%	2%	4%	7%	5%	8%	7%	19%	13%
Power outages	-	-	6%	7%	6%	6%	8%	8%	7%	9%	6%
Problem or complaint	5%	4%	2%	3%	2%	4%	5%	5%	2%	3%	6%
Energy conservation	-	-	-	-	1%	2%	3%	-	1%	1%	1%
Make payment arrangements	3%	4%	2%	1%	2%	1%	2%	1%	1%	4%	1%
Weatherization	-	-	-	-	-	-	1%	2%	1%	-	1%
SNAP sign-up or inquiry	-	-	-	-	-	-	-	-	1%	-	1%

Those in the Leavenworth area were significantly less likely than average to have contacted the PUD for a ‘request of service/information.’

Over the next few years, Chelan County PUD faces choices on spending that could affect rates. Please indicate the degree to which you may support each of the following financial investments in PUD services. Please use a scale of one to seven, with ‘one’ meaning do not support at all and ‘seven’ meaning you support completely.

- Q.37 Building the fiber-optic infrastructure necessary to support advanced technology**
- Q.38 Improving parks and recreation facilities**
- Q.39 Additional water reservoirs and pipelines to allow for continued growth in Chelan County**
- Q.40 Improvements in power lines and substations to enhance reliability and allow for future growth**
- Q.41 Modernizing hydroelectric dams to replace aging generating equipment**
- Q.42 Promoting energy conservation and efficiency measures**
- Q.43 Acquiring alternative energy sources such as wind and solar**

This series had not been asked previous to the 2006 wave.



Q.37 Building the fiber-optic infrastructure necessary to support advanced technology

This investment received a mean score of 5.20, ranking last of the seven tested.

Those who gave an overall assessment of Chelan County PUD as poor were significantly less likely than average to support building the fiber-optic infrastructure. Those building a home in the next ten years were somewhat more likely than average to support this.

Q.38 Improving parks and recreation facilities

With a mean score of 5.41 this task elicited the second lowest level of support.

Those with dependent children in the household ages thirteen to twenty-one and those respondents who had continued their education after graduating from college were more likely than average to support this. Those with a negative perception of the PUD were less likely than average to support improving parks and recreation facilities.

Q.39 Additional water reservoirs and pipelines to allow for continued growth in Chelan County

With a mean score of 5.74, this investment tied for fourth place.

Respondents who wanted an expanded emphasis on visitor center/tourist activities were significantly more likely than average to support this.

Q.40 Improvements in power lines and substations to enhance reliability and allow for future growth

This task ranked third with a mean score of 6.10.

The responses to this question spanned the tested subsets fairly evenly.

Q.41 Modernizing hydroelectric dams to replace aging generating equipment

This endeavor elicited a mean score of 6.37, ranking first among the seven tested.

Those respondents with less than a high school diploma and those who wanted to reduce the emphasis on visitor center/tourist activities were significantly more likely than average to support this investment.

Q.42 Promoting energy conservation and efficiency measures

This endeavor had a mean score of 6.22 and was ranked second.

Responses spanned the tested subsets fairly evenly.

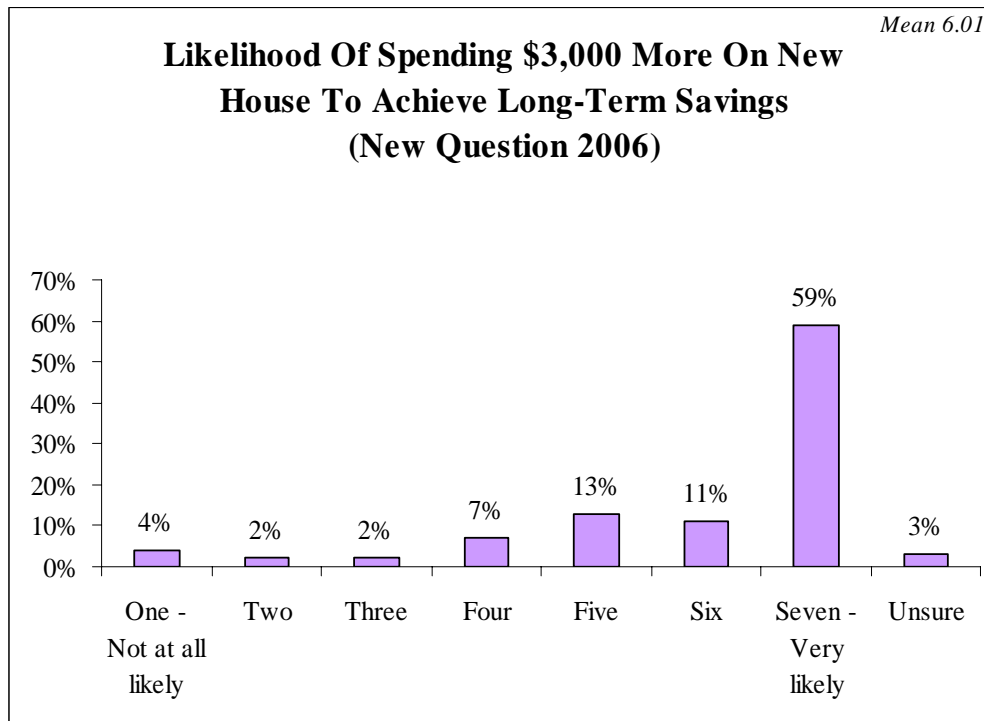
Q.43 Acquiring alternative energy sources such as wind and solar

This endeavor was ranked fourth, with a mean score of 5.74.

Those in the 18-34 year old age group were decidedly more likely than average to support this. Respondents who were not registered to vote and those renting their residences were also significantly more likely than average to support wind and solar.

Q.44 Imagine for a moment that you were building or buying a new home. For an extra \$3,000, it would include energy-saving appliances and other measures in order to achieve more comfort and continuous, long-term savings on your energy bill. How likely would you be to spend the extra \$3,000?

This question was not asked before the 2006 wave.



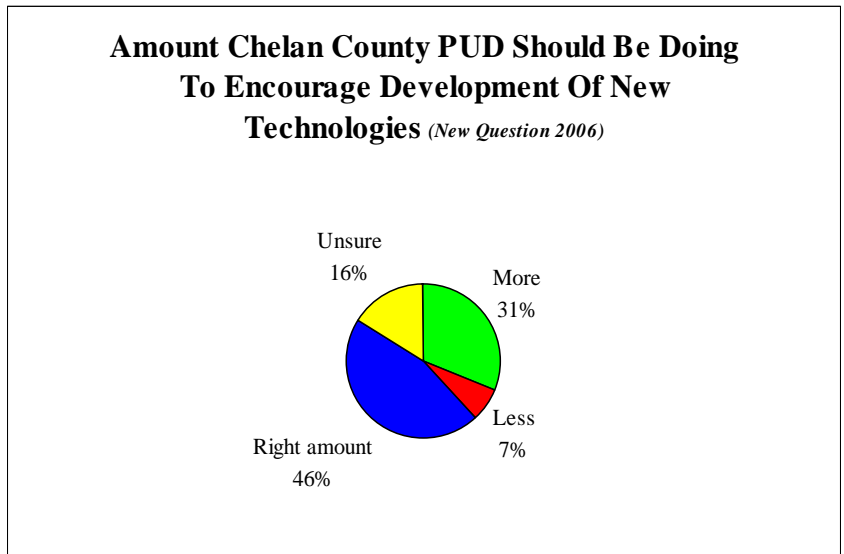
Those living in the Chelan area were less likely than average to be willing to spend the \$3,000.

Q.45 Do you think Chelan County PUD should be doing more, doing less or is doing the right amount to encourage development of new technologies such as solar power, wind turbines and plug-in hybrid vehicles?

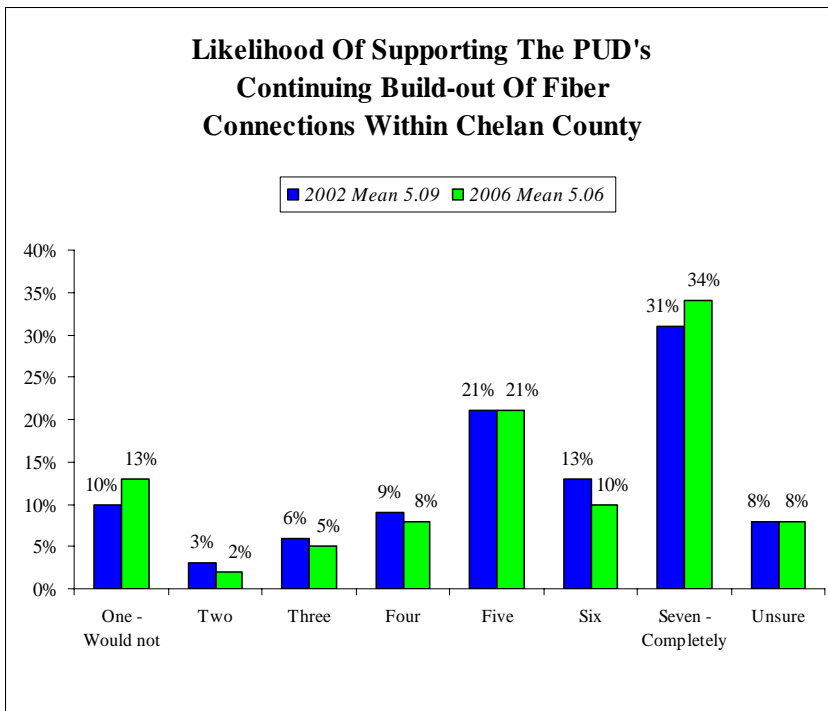
This question was not asked previous to the 2006 wave.

Seventy-seven percent of those surveyed thought that Chelan County PUD is either doing the right amount or should be doing more to encourage development of new technologies.

Responses spanned the subsets fairly evenly.



Q.46 Chelan County PUD is building a wholesale fiber-optic network. Based on your understanding, how likely would you be to support the Chelan County PUD’s continuing build-out of fiber connections within Chelan County?

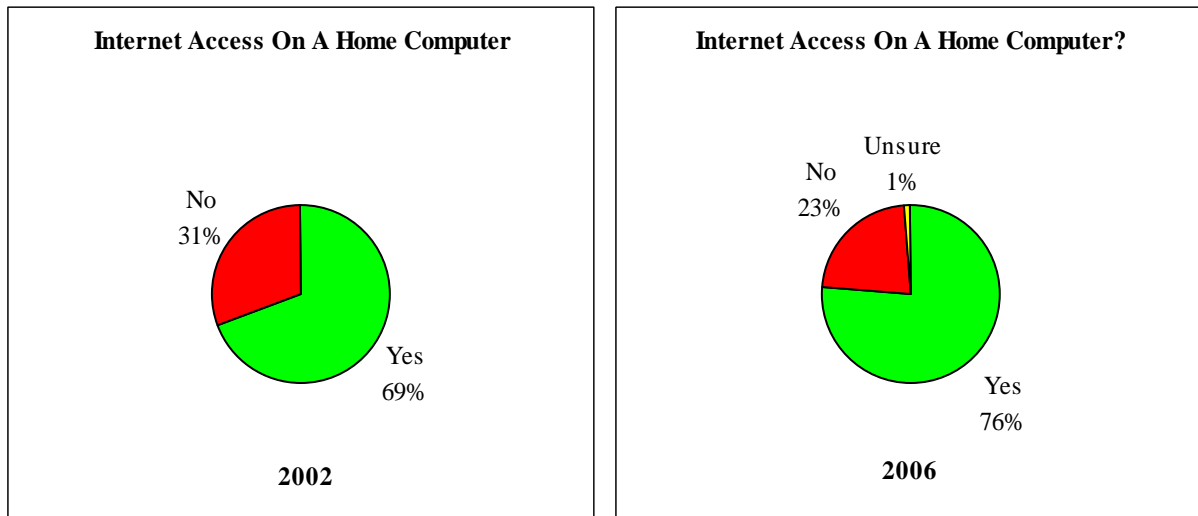


The difference between the 2002 wave and the 2006 wave was not statistically significant.

Those without internet access on a home computer were less likely than average to support the build-out.

Respondents residing in the Chelan area were slightly more likely than average to support this project.

Q.47 Do you have access to the internet on a home computer?

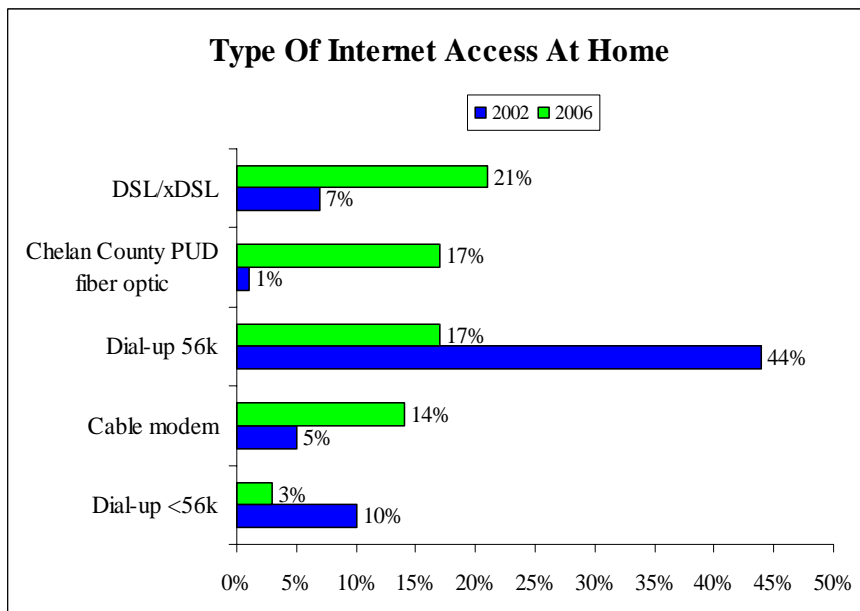


Internet access on a home computer rose seven percentage points from the last wave.

Those in the 35-45 age category were noticeably more likely than average to have internet access at their home. As the amount of education and income increases so does the percentage of respondents with access to the internet at their residence.

Q.48 What type of internet access do you have at your home, if any?

This question was only asked of the 306 respondents who said they had internet access in their home.

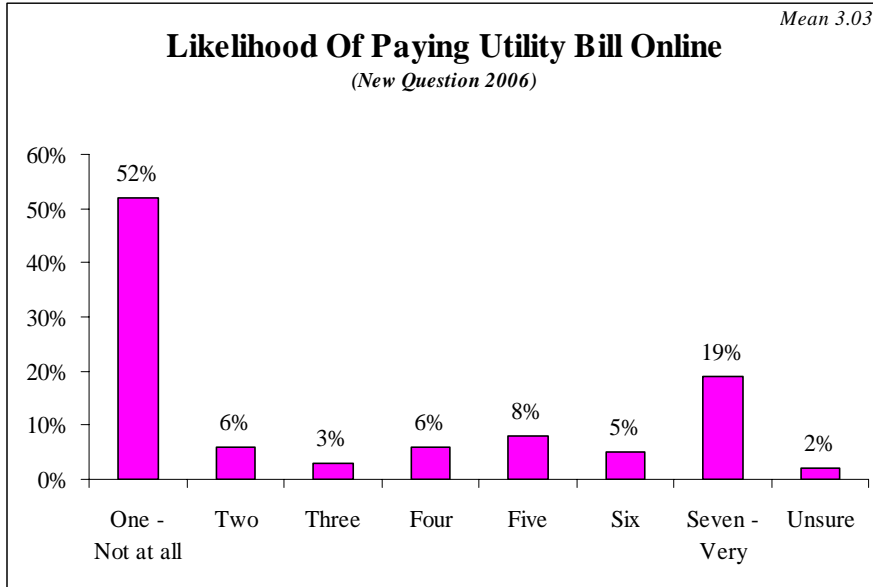


Between the years 2002 and 2006 the percentage of respondents using dial-up significantly decreased, while the percentage using DSL, cable modem, or PUD fiber-optics increased dramatically.

Responses spanned the subsets fairly evenly.

Q.49 Changing subjects again, the PUD recently offered customers the ability to pay their utility bill online using a home computer. Within the next twelve months, how likely would you be to use this service?

Question not asked before the 2006 wave.



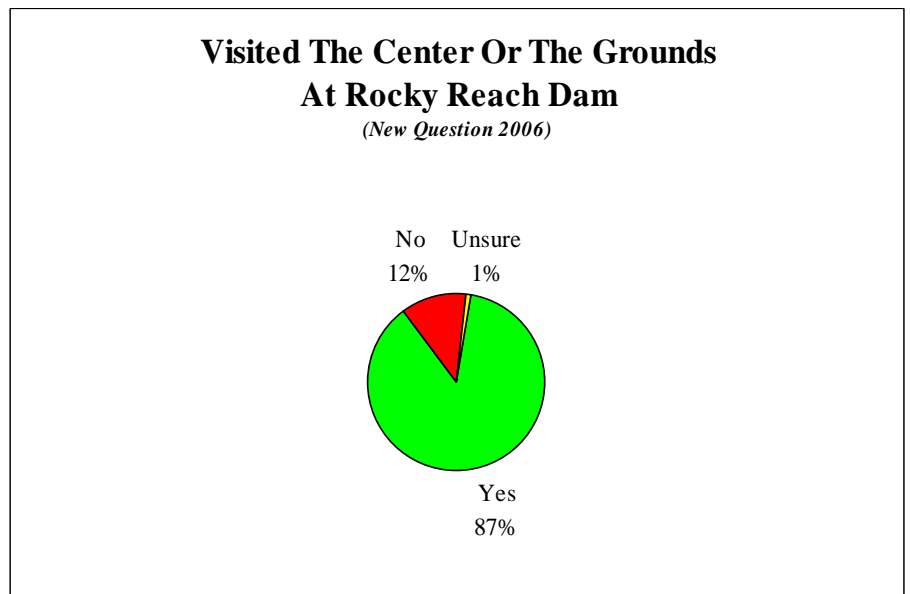
The mean score for this question is 3.03, nearly one point below the midpoint of the scale.

The responses spanned the tested subsets fairly evenly.

Q.50 Have you or members of your family ever visited the center or the grounds at Rocky Reach Dam?

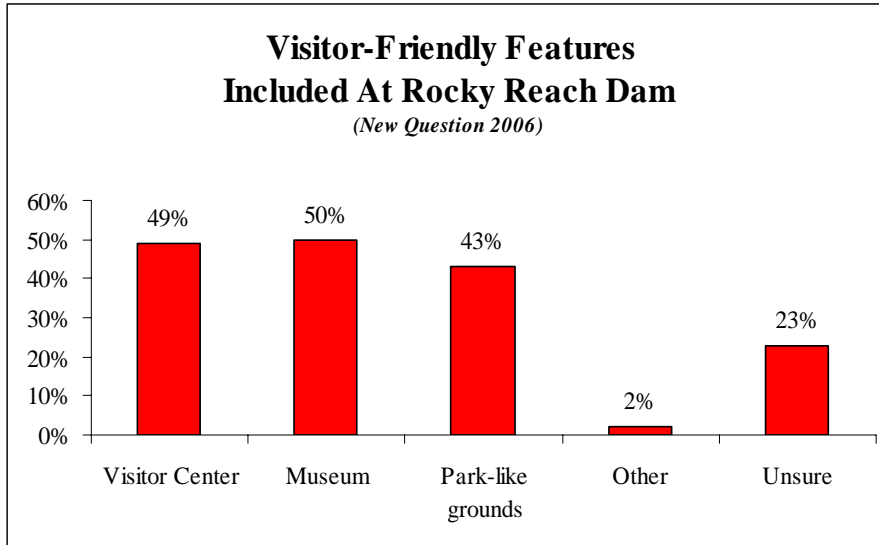
This question was not asked previous to the 2006 wave.

Slightly fewer than one in eight (12%) had never been to the grounds at Rocky Reach Dam.



Q.51 Based on your own experiences or anything you may have seen, read or heard, what visitor-friendly features are included at Rocky Reach Dam?

Note: Do not attempt to add similar comments as multiple responses were allowed.

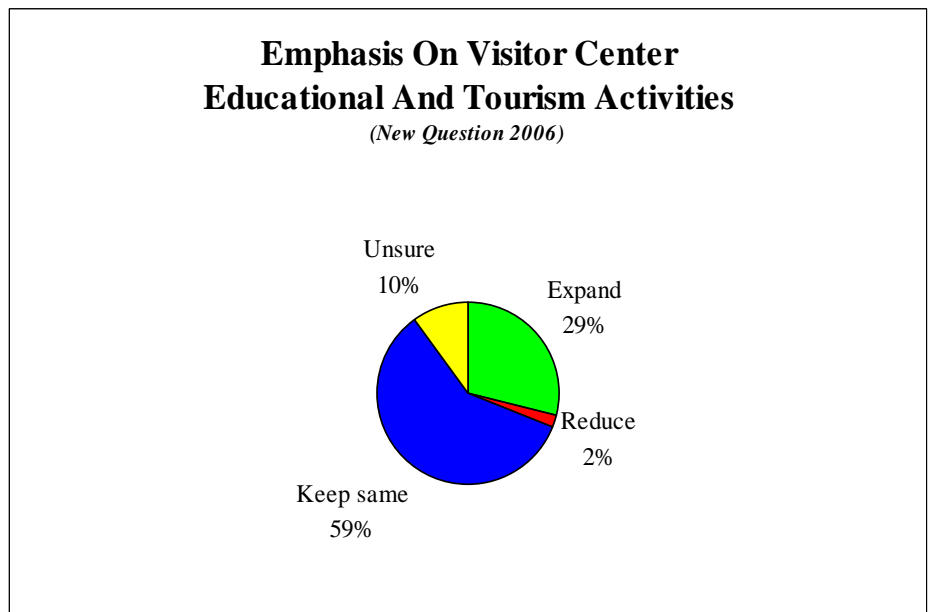


Slightly more than three out of every four (77%) were able to name some feature at the dam.

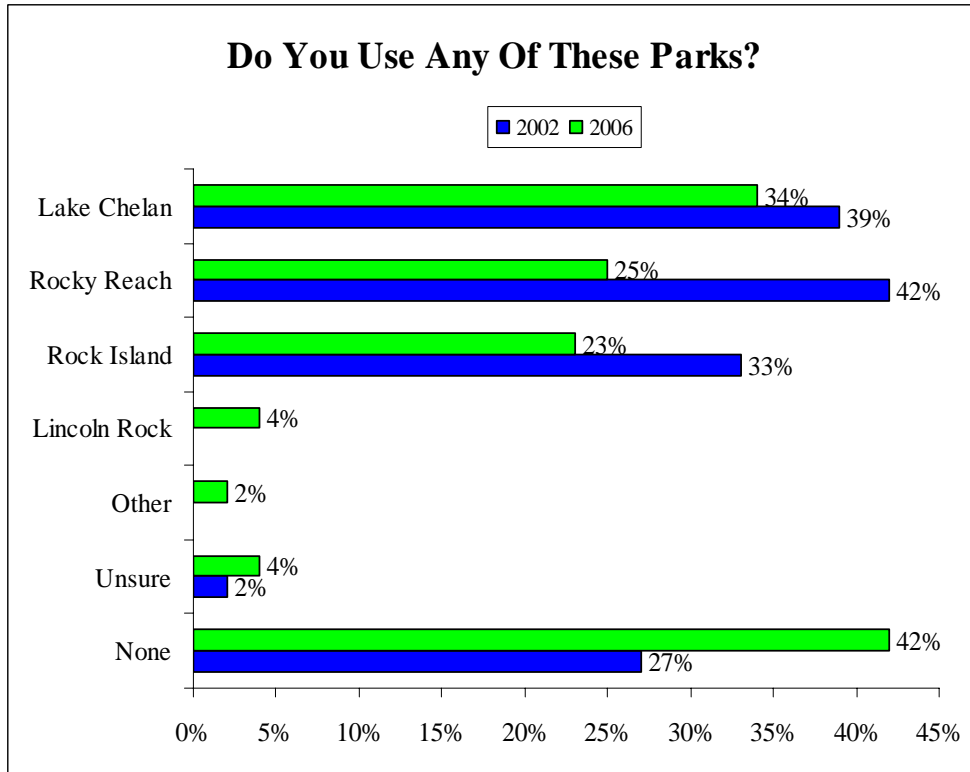
Q.52 Should the PUD expand, reduce or keep the same emphasis on Visitor Center educational and tourism activities?

This question was not asked previous to the 2006 wave.

Only six people (2%) felt that the PUD should reduce its emphasis on visitor center/educational activities.



Q.53 Chelan County PUD has developed parks along the Rock Island, Rocky Reach and Lake Chelan Hydro Project reservoirs. Do you use any of these parks?

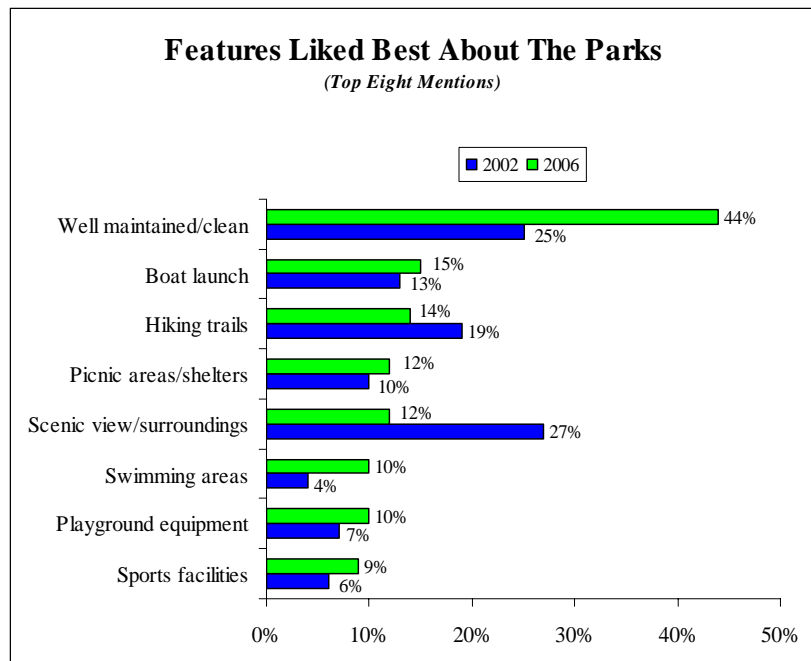


Reported use of all parks has gone down between 2002 and 2006.

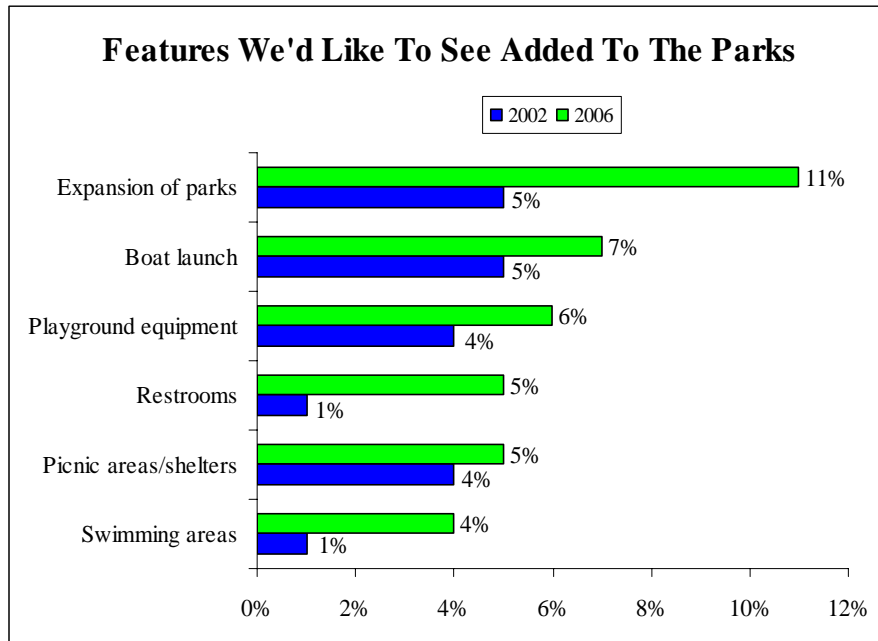
Q.54 What features do you like best about the parks?

This question was asked of the 216 respondents who stated they used one or more of the parks in the previous question.

Well maintained/clean increased nineteen percentage points from the 2002 wave.



Q.55 What features would you like to see added to the parks?



No single feature or addition was suggested by more than one-in-nine (11%)

Respondent Profile

- Eighty-nine percent claimed to be registered voters.
- Eighty-two percent reported that they were homeowners, identical to the previous ten-wave average.
- Eighty-nine percent reported that electricity was their primary home heat source, an all-time high.
- Four percent were planning to build or have a new home built within the next year, while nine percent intended to do so in the next five years and another ten percent intended to do so within the next ten years. Intent to buy or build a new home has remained fairly steady over the past seventeen years.
- The typical respondent had lived in Chelan County for 23.77 years, an upswing from the previous two waves.
- The average age of respondents was 54.92 years.
- Twenty-eight percent were college graduates. Another eleven percent reported having completed some type of post-graduate education, comparable to the ten-wave average.

- Sixty-five percent reported being married or living as married, comparable to the previous ten-wave average at sixty-nine percent.
- Thirty-three percent reported having children in the home under the age of twenty-one, twenty-one percent had children under the age of thirteen living in the household.
- The average reported combined annual household income was \$54,752, the highest reported average income for the study. This was considerably higher than the eight-wave average of \$39,077.
- As with all ten waves, half (50%) of the respondents were female (a gender quota was employed).
- As with previous waves, sixty-nine percent of the respondents resided in the Wenatchee area, fourteen percent in the Leavenworth area, eleven percent in the Chelan area, and the remaining six percent in the Manson area.