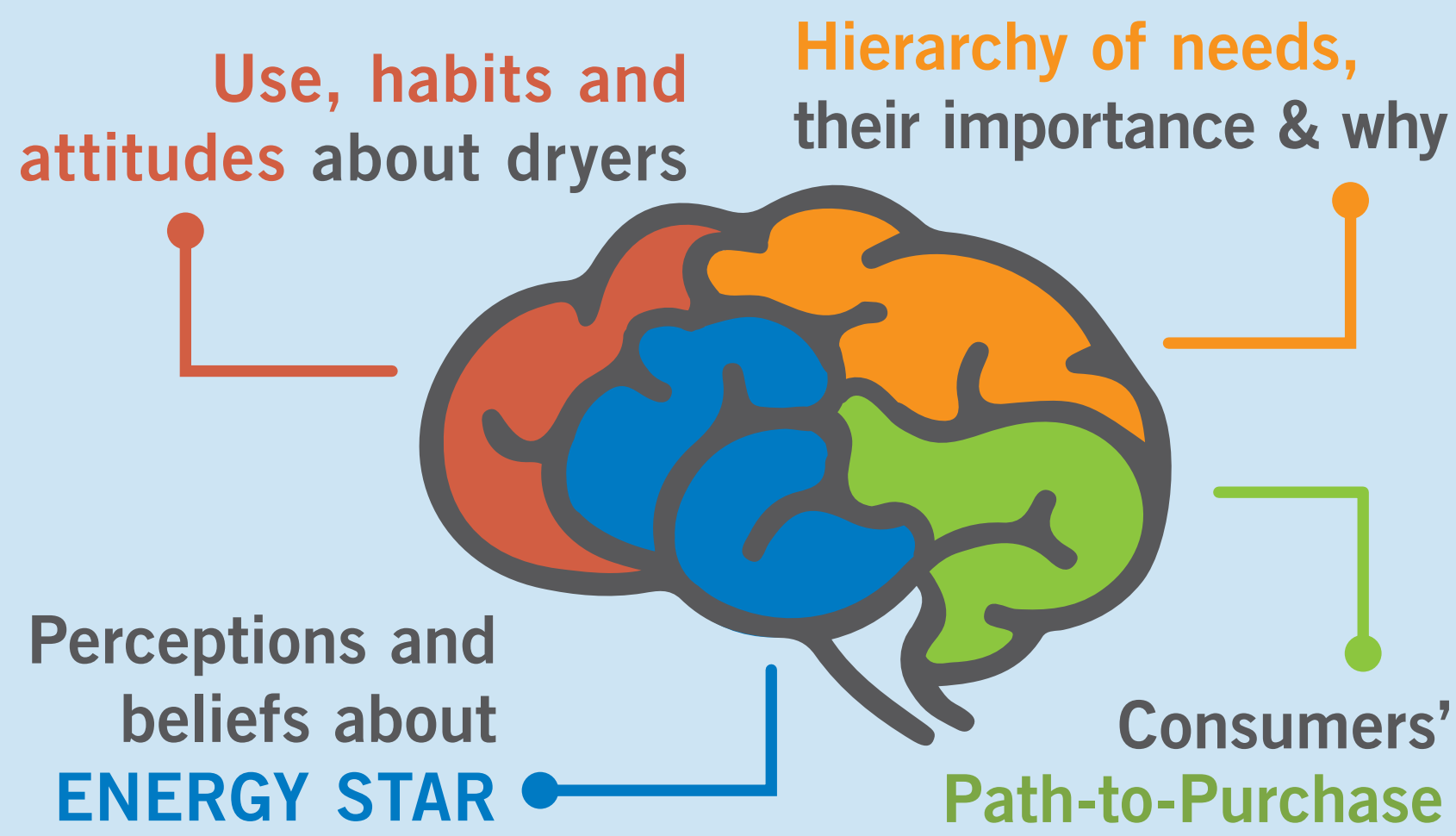


PHASE I: Develop in-depth understanding of consumer attitudes and beliefs

RESEARCH OBJECTIVES



RESEARCH METHOD



RESEARCH BY DAY:

DAY 1	DAY 2	DAY 3	DAY 4	DAY 5
Respondent Introductions	Laundry use & attitudes	Pre-shopping for dryers	In-store shopping	Reflection and advice

QUALITATIVE ONLINE RESEARCH PLATFORM:

BENEFITS:

- Strong participant engagement
- Builds 360-degree understanding
- Access into hard-to-reach respondents and multiple geographies
- Cost effective

ADVANTAGES:

- Any device, any-time
- Longitudinal engagement
- 1:1 or interactive conversations
- Team views in real-time and can discuss with moderator
- Immediate access to transcripts

RESEARCH RESULTS:

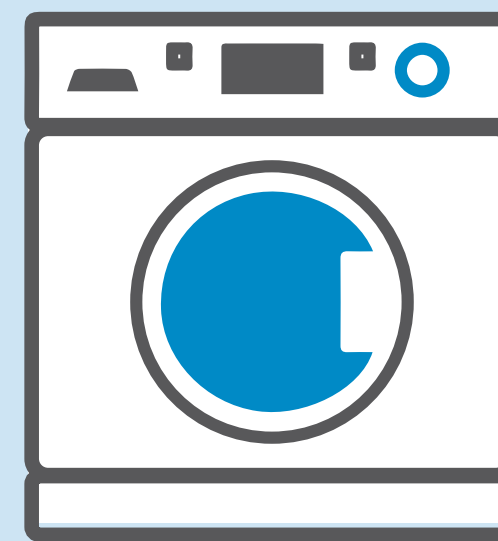


DRYER HIERARCHY OF NEEDS:



BENEFITS ASSOCIATED WITH ENERGY EFFICIENCY:

- Saving money
- Feeling proud
- Peace of mind
- Performance
- Owning newest technology



CONSUMER PATH-TO-PURCHASE:



DELIVERABLES:

THE 5 ADCEPTS:



TOGETHER We Are Transforming the Northwest



PHASE II: Get consumer feedback to Advertising Concepts 'AdCepts'

PART I QUANTITATIVE RESEARCH:



25 consumers evaluate 6 key attributes on a key-pad



Key AdCept Attributes



Real time results are seen in the backroom

PART II TWO FOCUS GROUP SESSIONS:



- 1 Recent dryer purchasers
 - 2 People who intend on buying a dryer within a year
- 1.5 hour sessions
 - Smaller group sizes (6-8 participants)
 - Focused on the "Why"

RESULTS AND THE WINNER IS...

- Product hero shot
- "Straight talk" communication
- ENERGY STAR® Most Efficient logo



ADDITIONAL FINDINGS:

WHAT DOESN'T WORK:

- Describing magnitude of savings (more compelling than percentage)
- Providing easy-to-find cues regarding efficiency (so they know what to look for)
- Explaining what heat pump does (re-uses hot air) to achieve benefit

WHAT DOESN'T WORK:

- Energy efficiency by itself—it's nothing new
- Broader lifestyle ideas that are not connected to daily living choices
- Explaining energy savings relative to other appliances
- Technical explanation of how a heat pump works