



**Platte River**  
Power Authority

Estes Park • Fort Collins • Longmont • Loveland

---

# 2018 Integrated Resource Plan Survey Results

Conducted by:



**(a solutions company)**



# CONTENTS

## BACKGROUND

Scope & Methodology .....	3
Executive Summary .....	4

## FINDINGS

Presentation.....	5
Customer Notification .....	44
Survey Questions .....	45

## SUMMARY

Results Overview .....	46
------------------------	----

# 2018 Integrated Resource Plan Survey



## Scope and Methodology

During the fall of 2018, Platte River Power Authority, in coordination with Estes Park Light and Power, conducted an Integrated Resource Planning Survey to measure residential and commercial end user favorability toward Platte River, opinions about the importance of receiving non-carbon energy, economic elasticity of renewables, and to collect basic demographic and firmographic data.

Survey responses were received from 307 randomly-selected residential customers and 115 commercial customers. The results of the residential survey have a margin of error of  $\pm 5.5$  percent at a 95 percent degree of probability. That means for any given statistic, there is a 95 percent chance that the result does not vary by more than 5.5 percent in the actual total population. The results of the commercial survey have a margin of error of  $\pm 8.8$  percent.

Of the 307 residential survey completions, 173 (56 percent) were completed online by customers responding to a postcard mailing. Following the online completions, 134 (44 percent) surveys were completed by callers conducting phone interviews. In completing the 134 phone surveys there were 31 refusals or disconnects, for a refusal rate of 19 percent. Of the 115 commercial survey completions, 33 (29 percent) were completed online, and 82 (71 percent) were completed by phone. In completing the 82 phone surveys there were 8 refusals or disconnects, for a refusal rate of 9 percent.

The survey was conducted as part of a research project coordinated by Platte River Power Authority. Four municipalities served by Platte River participated in the project, including the Town of Estes Park, City of Fort Collins, City of Longmont and City of Loveland.

Several questions in this survey involve responses on a 10-point sliding scale. These responses are evaluated using “top box” analysis – that is, calculating the frequency percentage of respondents in the 8 to 10 ratings on the sliding scale. Along with top box analysis, weighted averages are also calculated for these questions. Due to rounding, response percentages may not always total 100 percent.

This survey was developed and conducted by Inside Information, Inc.<sup>®</sup>, Smithville, MO, as a research project commissioned by Platte River Power Authority, Fort Collins, CO.

# Executive Summary

\* ratings are on a 10-point scale, or the percentage of 8-10 responses (top box)



## Platte River Power Authority

- Similar numbers of residential and commercial customers, nearly 60 percent, are aware Platte River provides electricity generation and transmission services to their utility
- 62 percent of residential and 48 percent of commercial customers rate Platte River Power Authority somewhat or very favorably
- Customers who are aware Platte River Power Authority provides G&T services to their utility rate Platte River Power Authority higher in overall favorability, showing concern for the environment, and offering adequate energy efficiency programs
- Generally lower awareness among commercial customers of the resources Platte River Power Authority uses to provide electricity – lowest awareness of solar power



## Estes Park Light & Power

- 81 percent of residential customers and 80 percent of commercial customers rate Estes Park Light and Power somewhat or very favorably
- Slightly more than half of customers somewhat or strongly agree that Estes Park Light and Power shows concern for the environment – slightly fewer than half somewhat or strongly agree that it offers adequate energy efficiency programs



## Renewable Resource Options

- Both groups place similar priority on service reliability, receiving electricity at the lowest possible cost and utilizing renewable resources
- About half of residential customers are willing to pay \$5 to \$20 per month more on their bill for electricity generated from renewable resources – more than 4 in 10 are not willing to pay more
- About 4 in 10 commercial customers are willing to pay 1 percent to 10 percent more per month for renewable energy – nearly half are not willing to pay more



## Demographics

- Mostly older respondents, median age is 67 – median length of service is 14 years
- Considerable income levels, about 3 in 10 respondents earn \$100,000 or more per year – median annual income is \$77,271 – nearly 8 in 10 have a college degree



## Firmographics

- Median length of service for commercial customers is 21 years – nearly 3 in 4 of the businesses have fewer than 10 employees
- More service businesses responding (69 percent) to the commercial survey, followed by retail sales (18 percent)
- 2 in 3 businesses have annual revenue of less than \$500,000, more than half report electric costs as 5 percent or more of their overall business expense



**Platte River**  
Power Authority

Estes Park • Fort Collins • Longmont • Loveland

# **Integrated Resource Plan Survey Results**

**2018**

## Overview

### Integrated Resource Plan Survey 2018



During the fall of 2018, Platte River Power Authority, in conjunction with Estes Park Light & Power, conducted an Integrated Resource Planning Survey to measure residential and commercial end user favorability toward Platte River Power Authority, opinions about the importance of receiving non-carbon energy, economic elasticity of renewables, and to collect basic demographic and firmographic data.

These results include online and phone survey replies from 307 residential end users and 115 commercial responses.

# Highlights



- Similar numbers of residential and commercial customers, nearly 60 percent, are aware Platte River Power Authority provides electricity generation and transmission services to their utility
- 81 percent of residential customers and 80 percent of commercial customers rate Estes Park Light and Power somewhat or very favorably
- 62 percent of residential and 48 percent of commercial customers rate Platte River Power Authority somewhat or very favorably
- Customers who are aware Platte River Power Authority provides G&T services to their utility rate Platte River Power Authority higher in overall favorability, showing concern for the environment, and offering adequate energy efficiency programs
- Slightly more than half of customers somewhat or strongly agree that Estes Park Light and Power shows concern for the environment – slightly fewer than half somewhat or strongly agree that it offers adequate energy efficiency programs
- Generally lower awareness among commercial customers of the resources Platte River Power Authority uses to provide electricity – lowest awareness of solar power
- Both groups place similar priority on service reliability, receiving electricity at the lowest possible cost and utilizing renewable resources

# Highlights



About half of residential customers are willing to pay \$5 to \$20 per month more on their bill for electricity generated from renewable resources – more than 4 in 10 are not willing to pay more

About 4 in 10 commercial customers are willing to pay 1 percent to 10 percent more per month for renewable energy – nearly half are not willing to pay more

Mostly older respondents, median age is 67 – median length of service is 14 years

Considerable income levels, about 3 in 10 respondents earn \$100,000 or more per year – median annual income is \$77,271 – high education levels, nearly 8 in 10 have a college degree

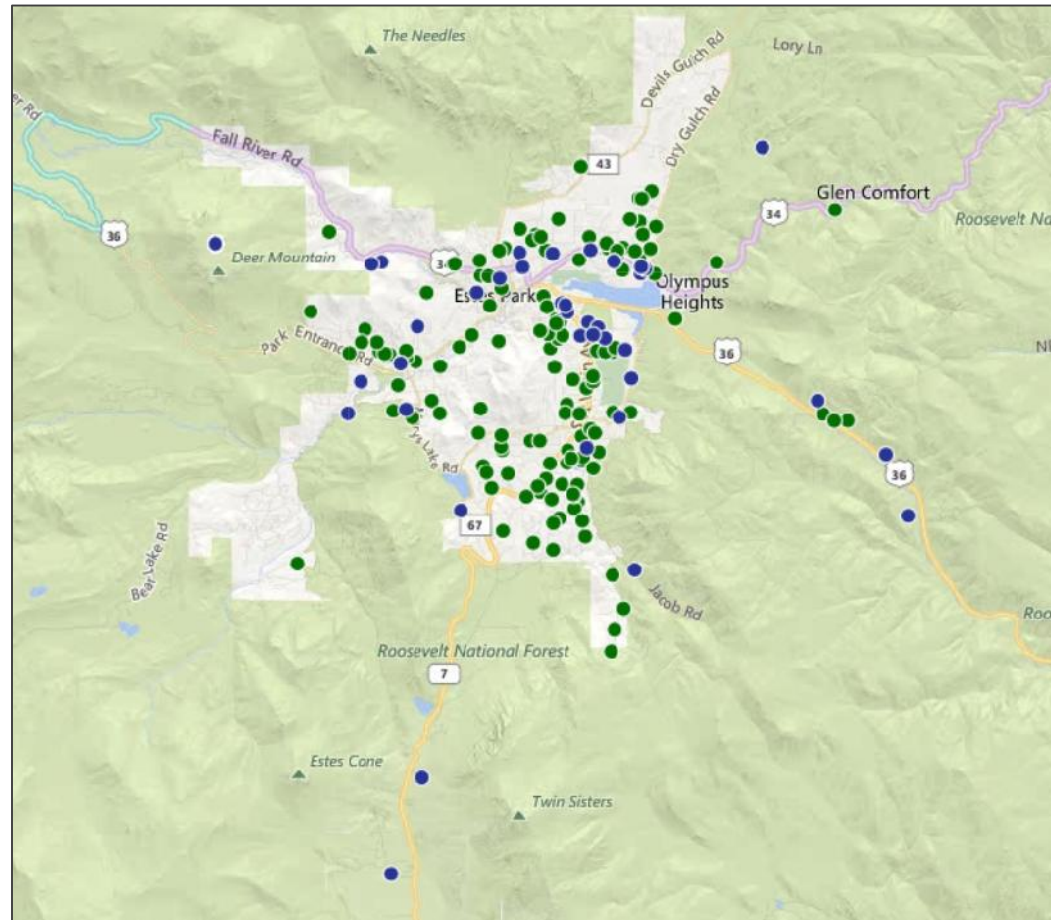
Median length of service for commercial customers is 21 years – nearly 3 in 4 of the businesses have fewer than 10 employees

More service businesses responding (69 percent) to the commercial survey, followed by retail sales (18 percent)

2 in 3 businesses have annual revenue of less than \$500,000, more than half report electric costs as 5 percent or more of their overall business expense



# Respondents



- Residential
- Commercial

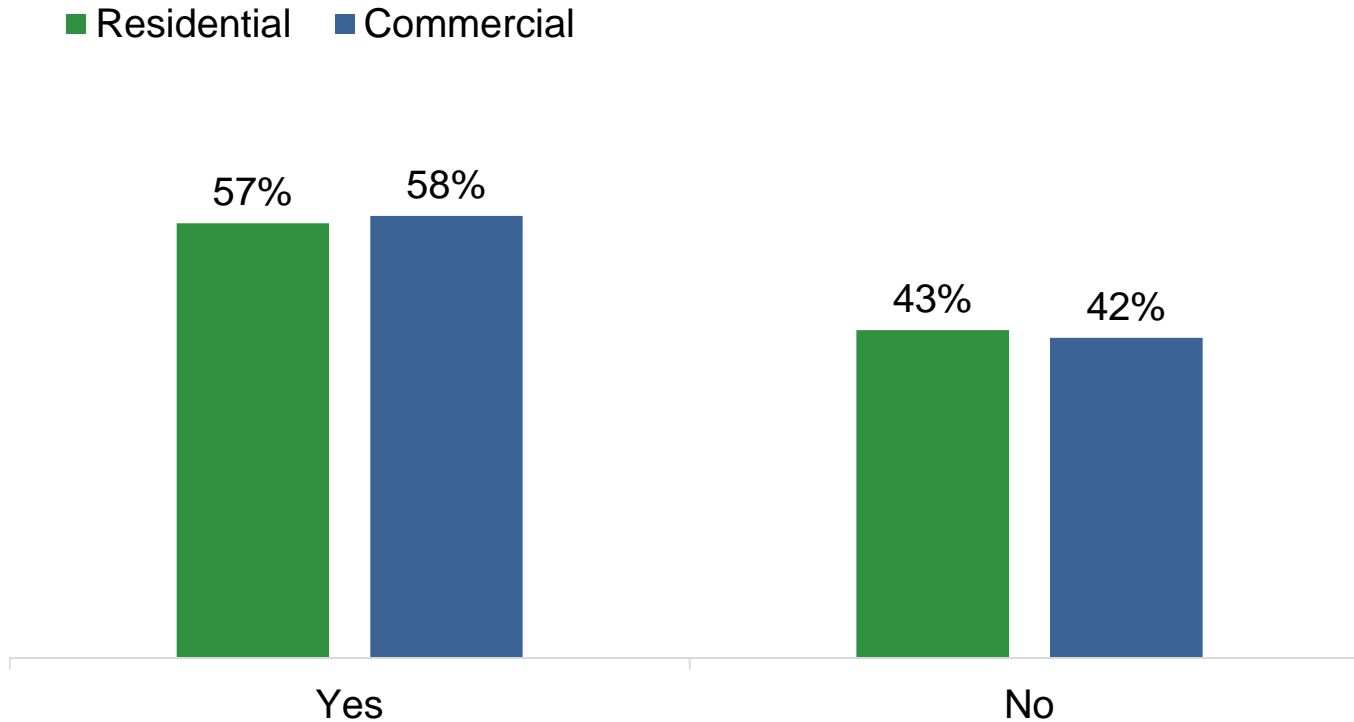


# **Platte River Power Authority**

# Platte River Power Authority



Aware Platte River Power Authority provides generation



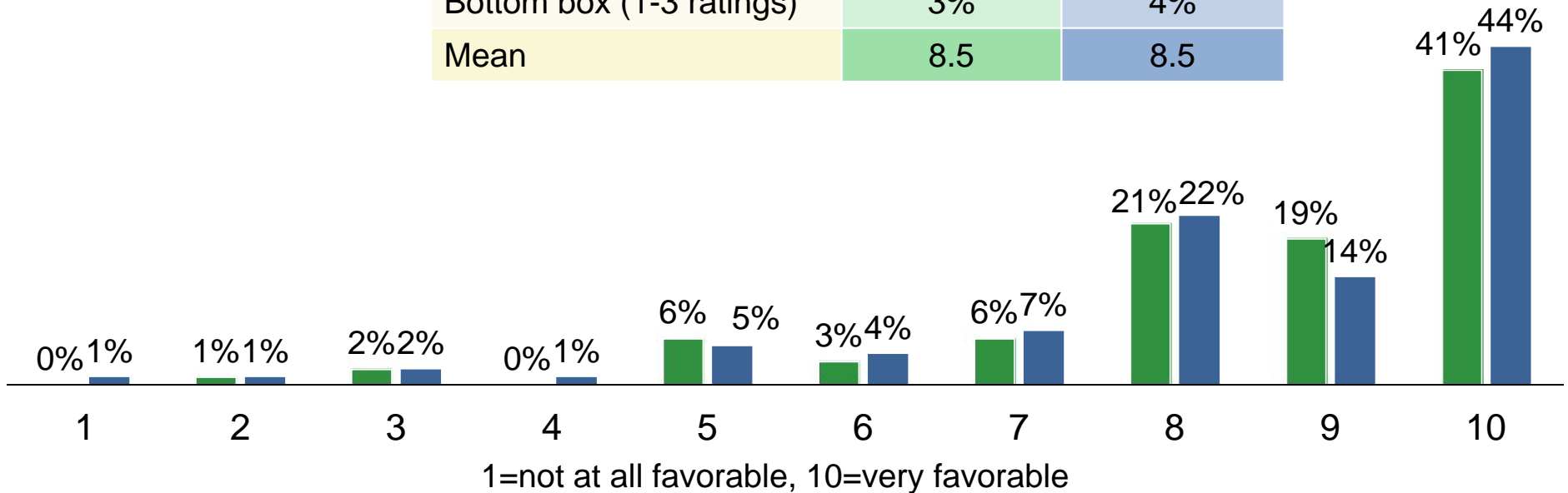
# Estes Park Light & Power



## Opinion of Estes Park Light and Power

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	81%	80%
Bottom box (1-3 ratings)	3%	4%
Mean	8.5	8.5



# Platte River Power Authority

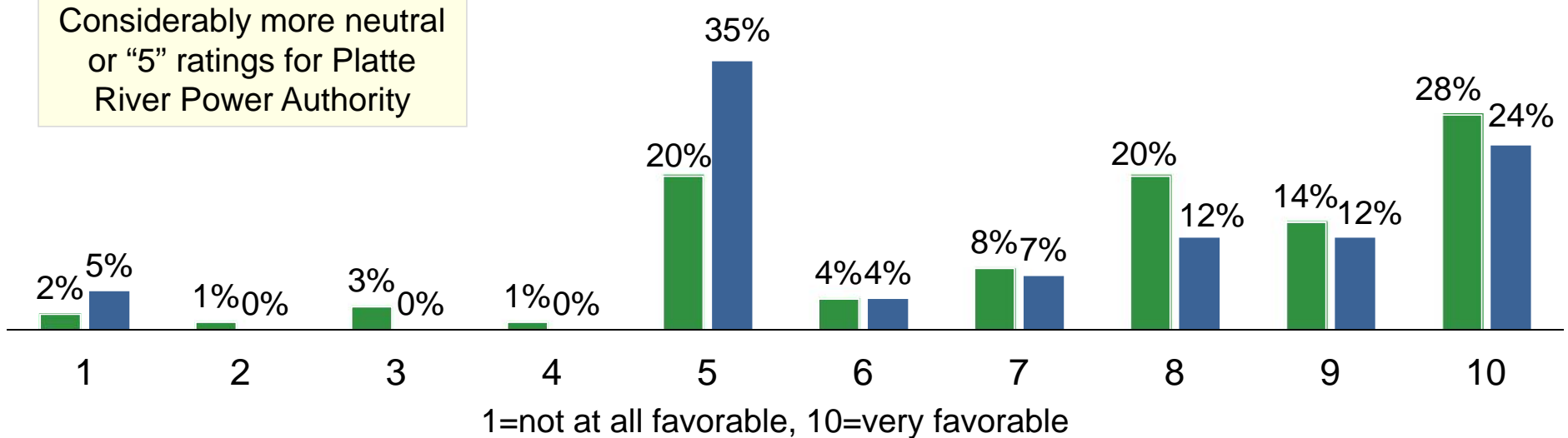


## Opinion of Platte River Power Authority

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	62%	48%
Bottom box (1-3 ratings)	6%	5%
Mean	7.6	7.0

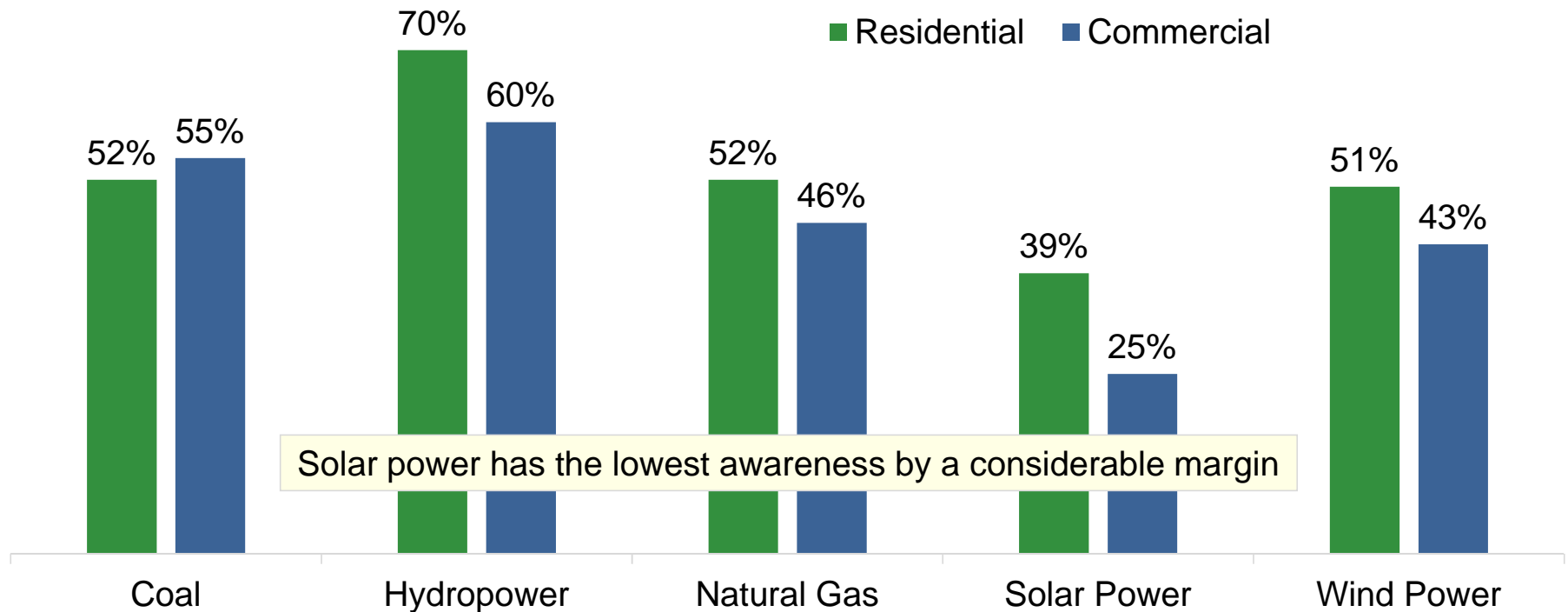
Considerably more neutral  
or “5” ratings for Platte  
River Power Authority



# Platte River Power Authority



## Resources used by Platte River Power Authority



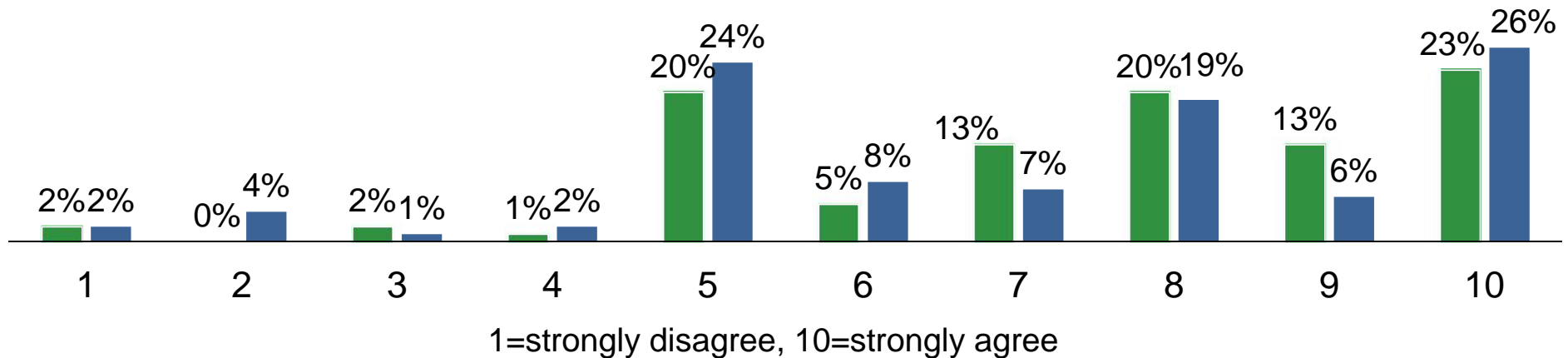
# Estes Park Light & Power



Estes Park Light & Power shows concern for the environment

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	56%	51%
Bottom box (1-3 ratings)	4%	7%
Mean	7.4	7.2



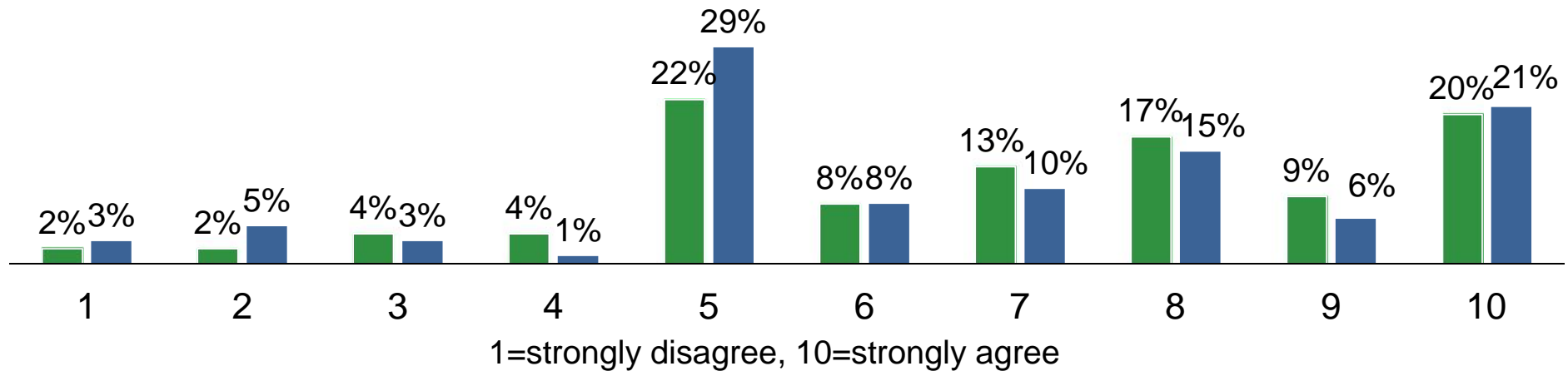
# Estes Park Light & Power



Estes Park Light & Power offers adequate programs to help use energy efficiently

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	46%	42%
Bottom box (1-3 ratings)	8%	11%
Mean	6.9	6.7

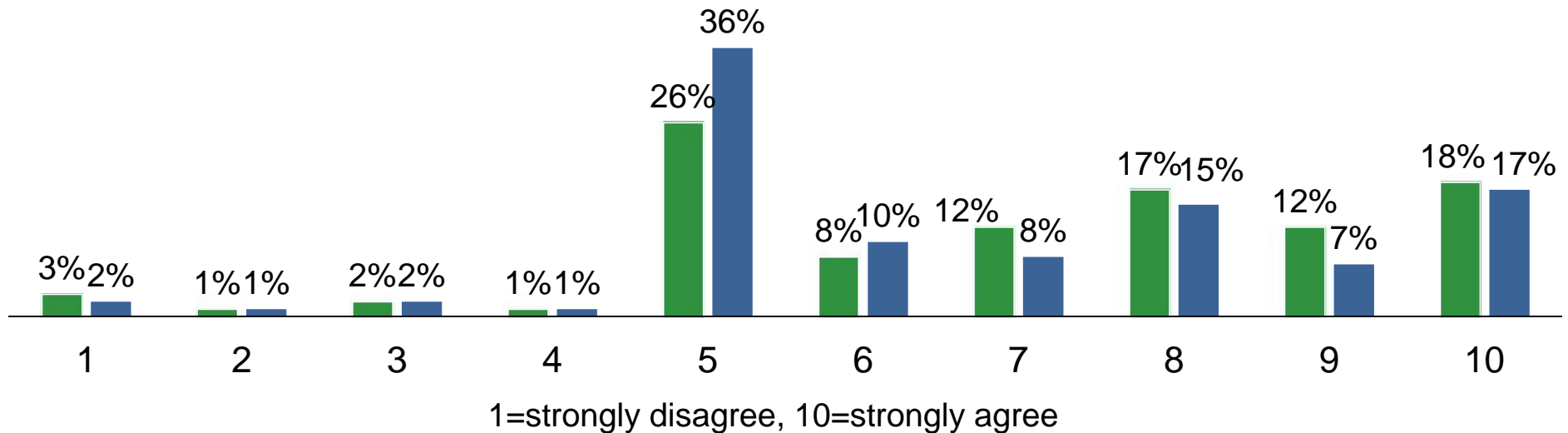




## Platte River Power Authority shows concern for the environment

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	47%	39%
Bottom box (1-3 ratings)	6%	5%
Mean	7.0	6.7



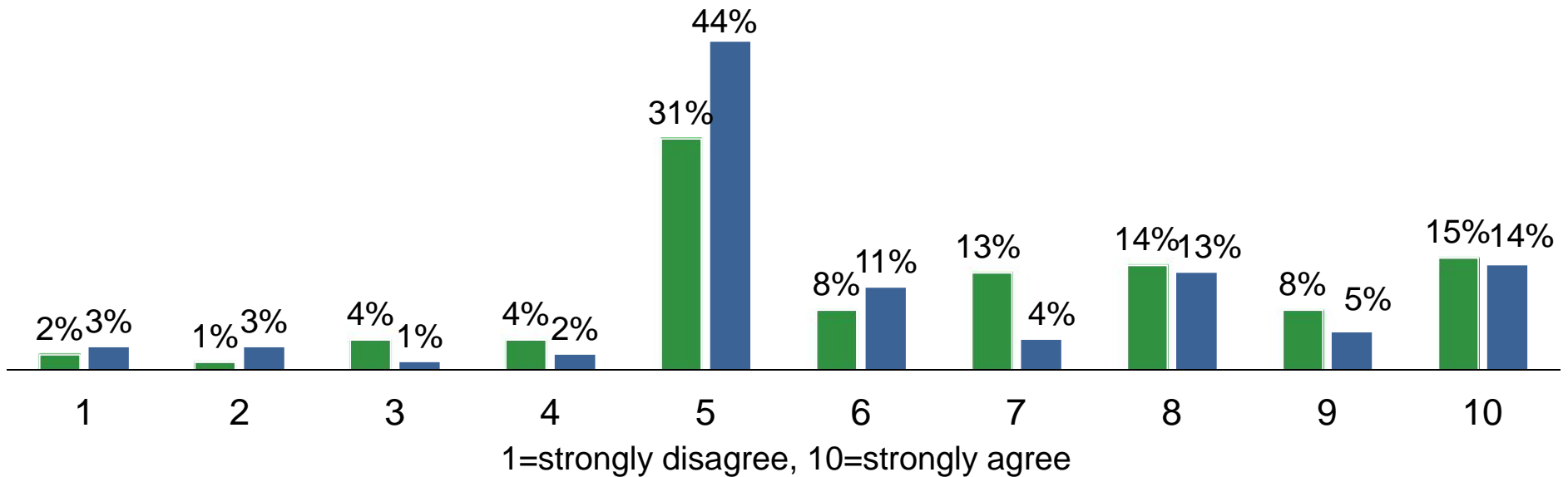
# Platte River Power Authority



Platte River Power Authority offers adequate programs to help use energy efficiently

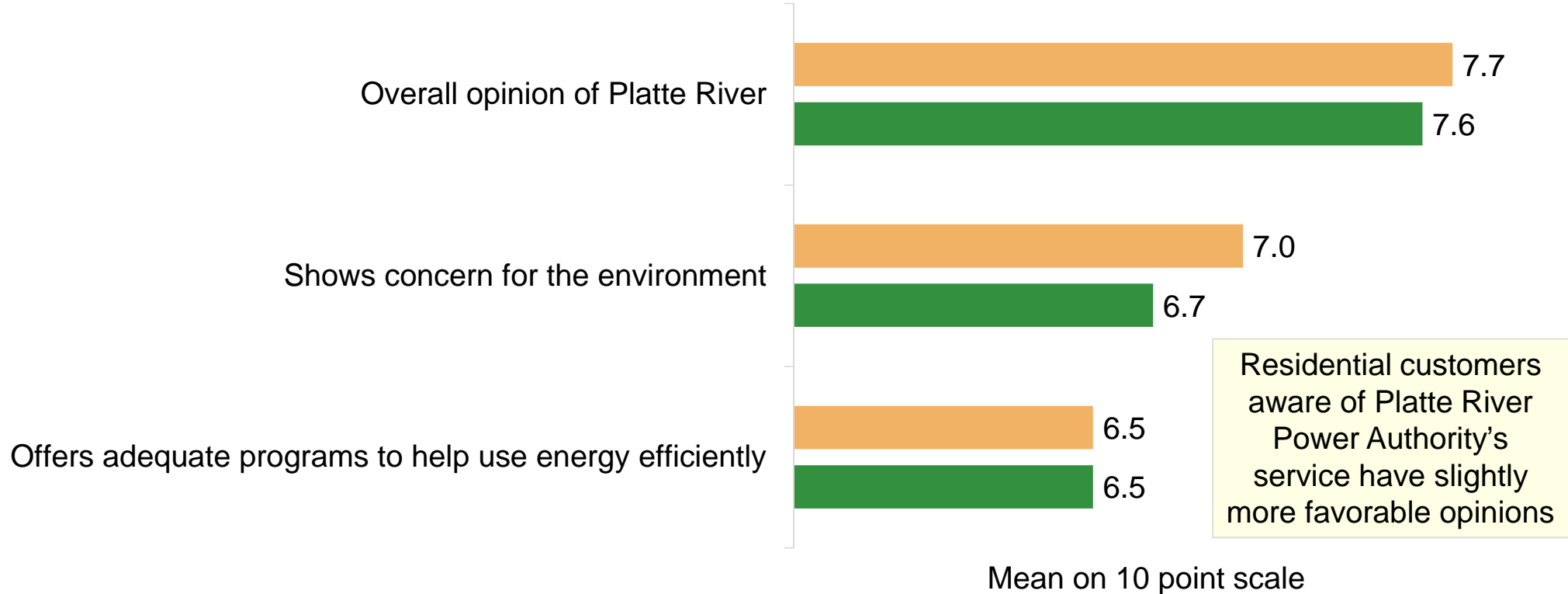
■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	37%	32%
Bottom box (1-3 ratings)	7%	7%
Mean	6.5	6.2



## Opinion of Platte River Power Authority comparison - residential

■ Those aware Platte River Power Authority provides electricity   ■ Overall

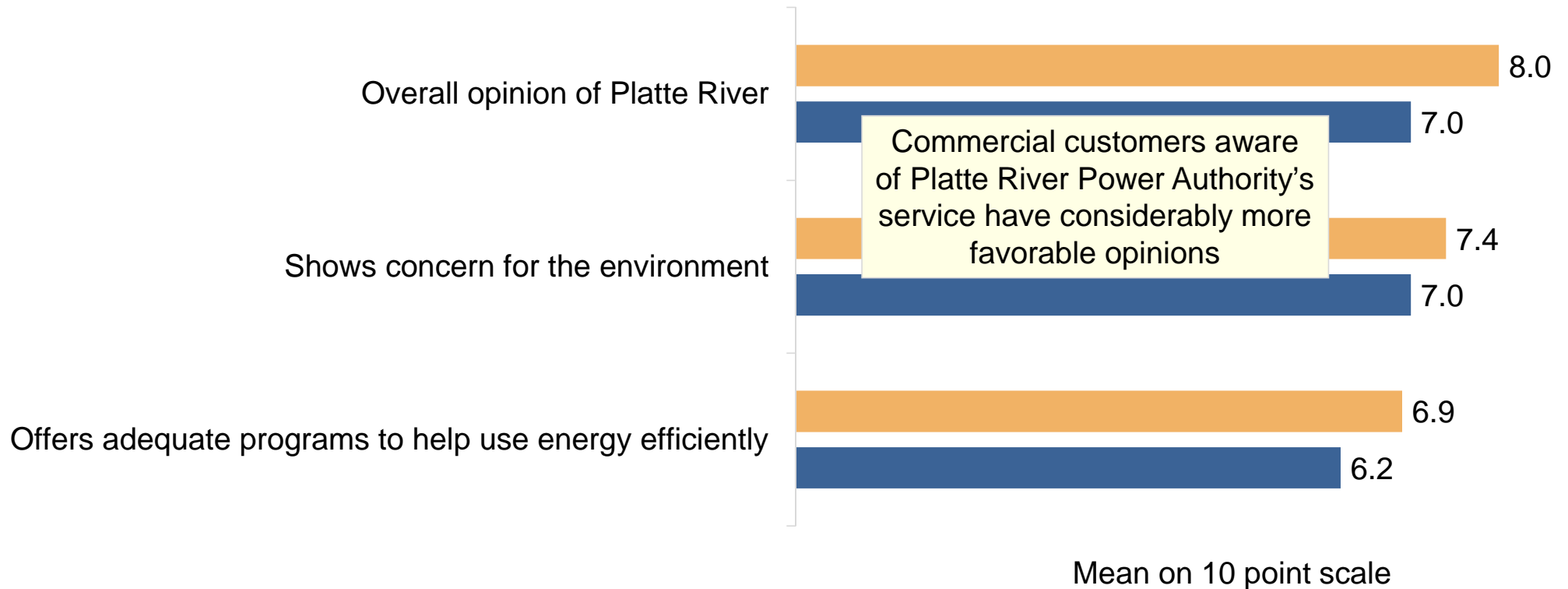


# Platte River Power Authority



## Opinion of Platte River Power Authority comparison - commercial

■ Those aware Platte River Power Authority provides electricity ■ Overall





# **Renewable Resource Opinions**

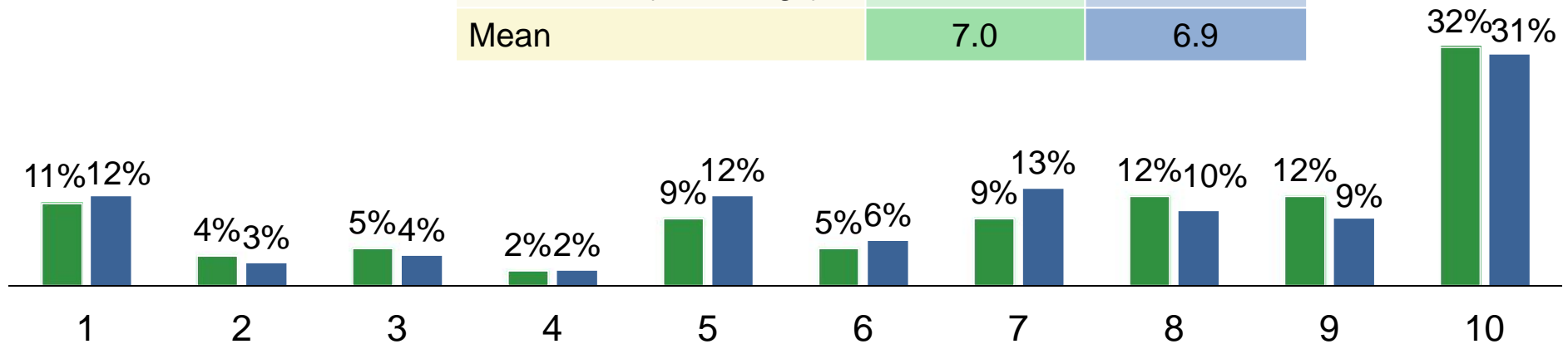
# Renewables



How important is it that 100 percent of the energy you receive comes from renewable resources?

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	56%	50%
Bottom box (1-3 ratings)	20%	19%
Mean	7.0	6.9



1=not at all important, 10=very important

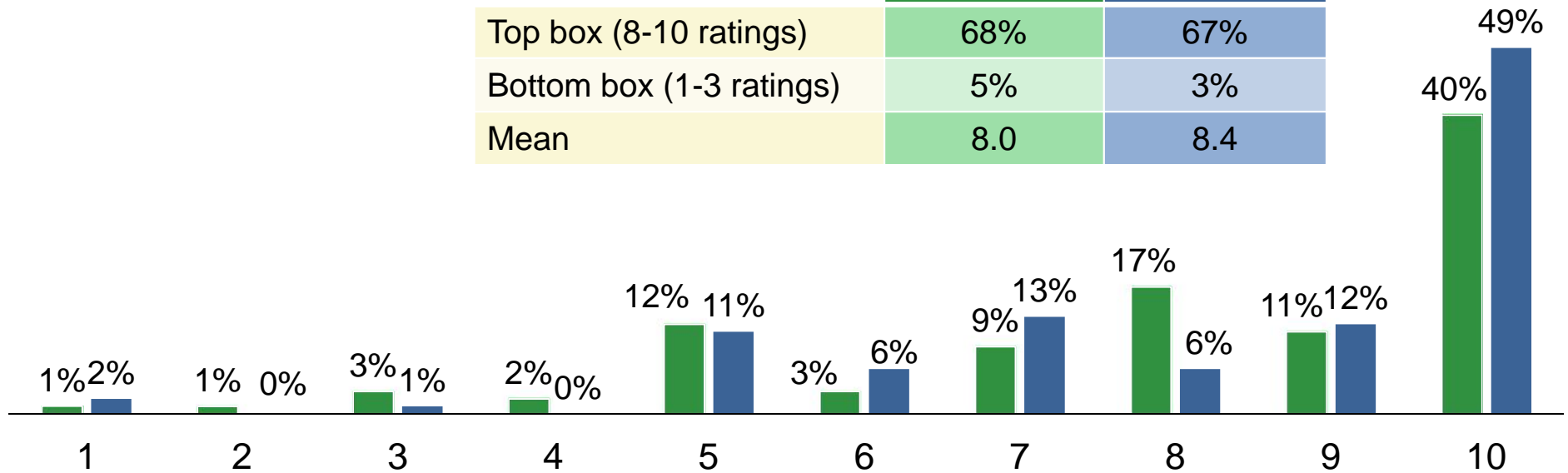
# Renewables



## Importance of lowest possible cost

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	68%	67%
Bottom box (1-3 ratings)	5%	3%
Mean	8.0	8.4



1=not at all important, 10=very important

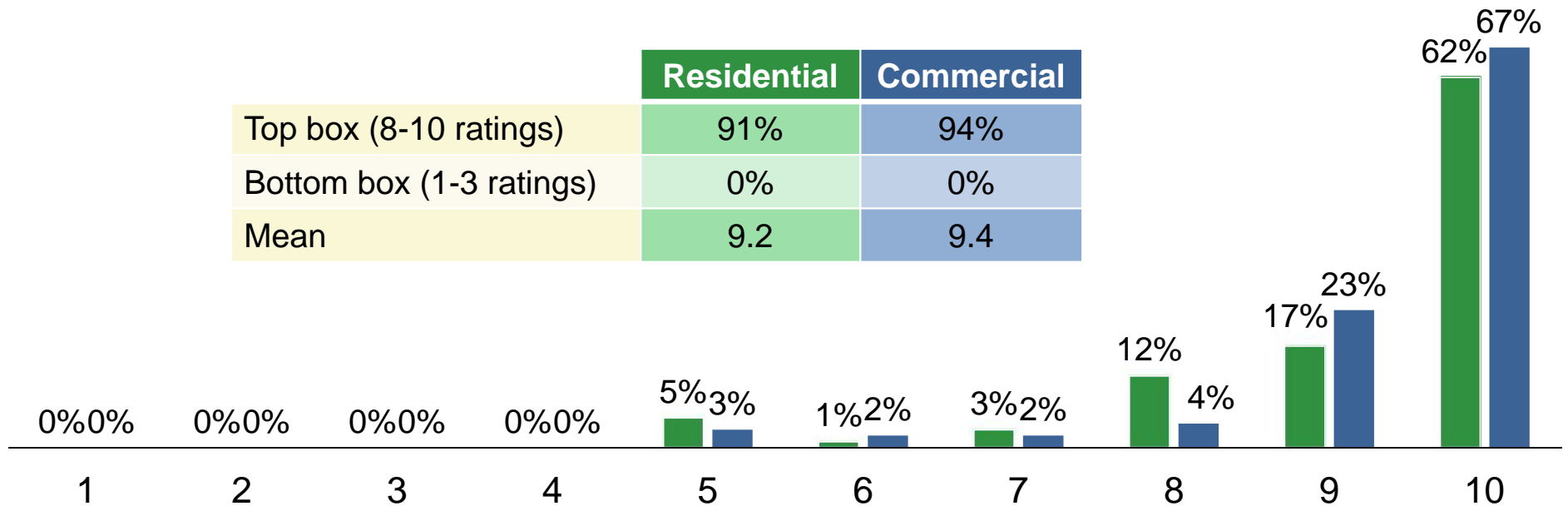
# Renewables



## Importance of reliable service

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	91%	94%
Bottom box (1-3 ratings)	0%	0%
Mean	9.2	9.4



1=not at all important, 10=very important

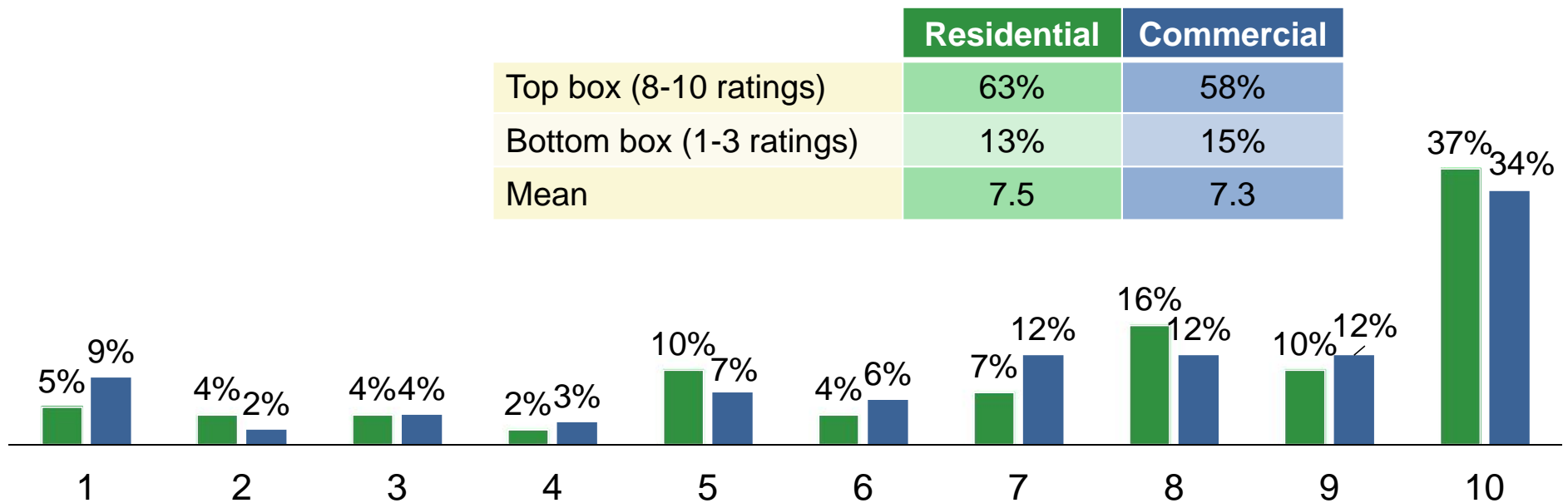


# Renewables



## Importance of renewable resources

■ Residential ■ Commercial



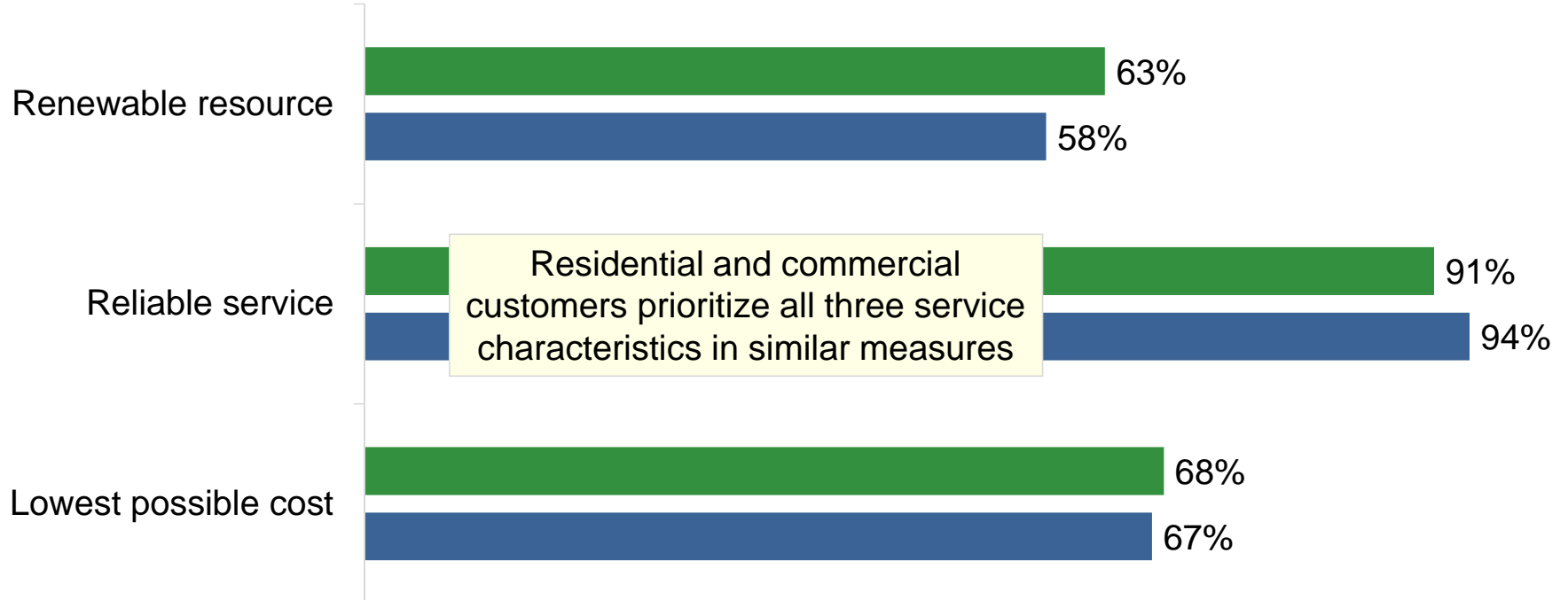
1=not at all important, 10=very important

# Renewables



## Service characteristics importance

■ Residential ■ Commercial

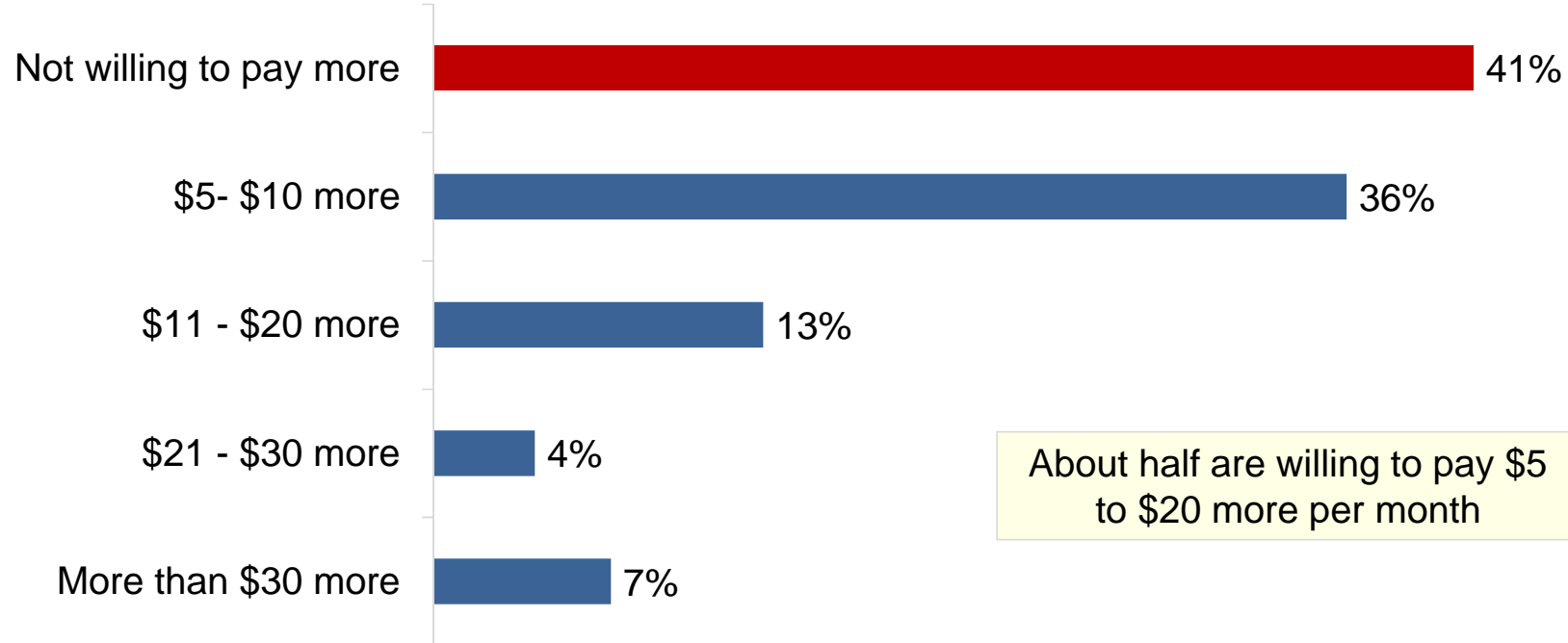


Somewhat or very important (8-10 ratings)

## Renewables



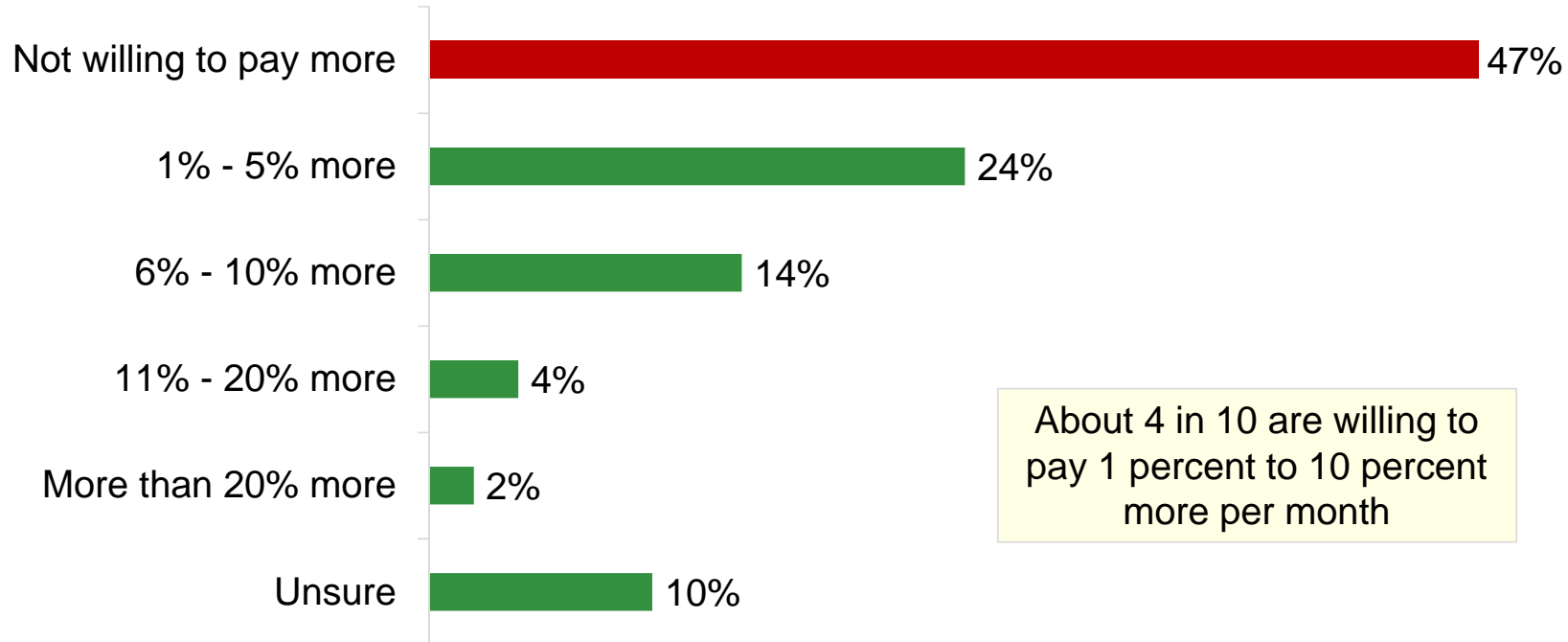
Additional monthly amount willing to pay for renewable energy - residential

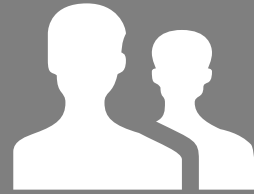


## Renewables



Additional monthly amount willing to pay for renewable energy - commercial





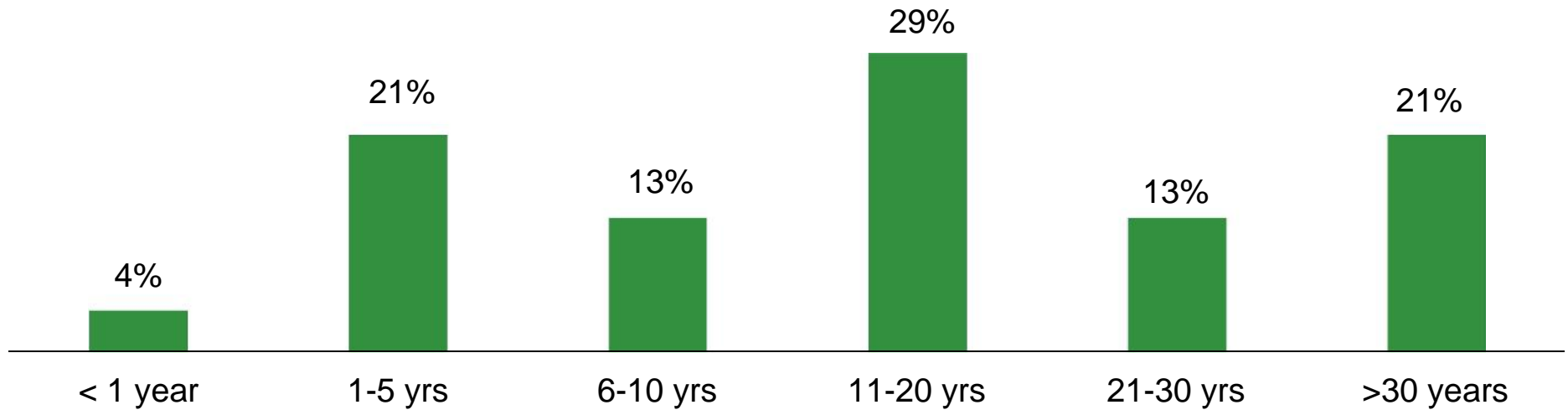
# Demographics

## Demographics



### Length of service

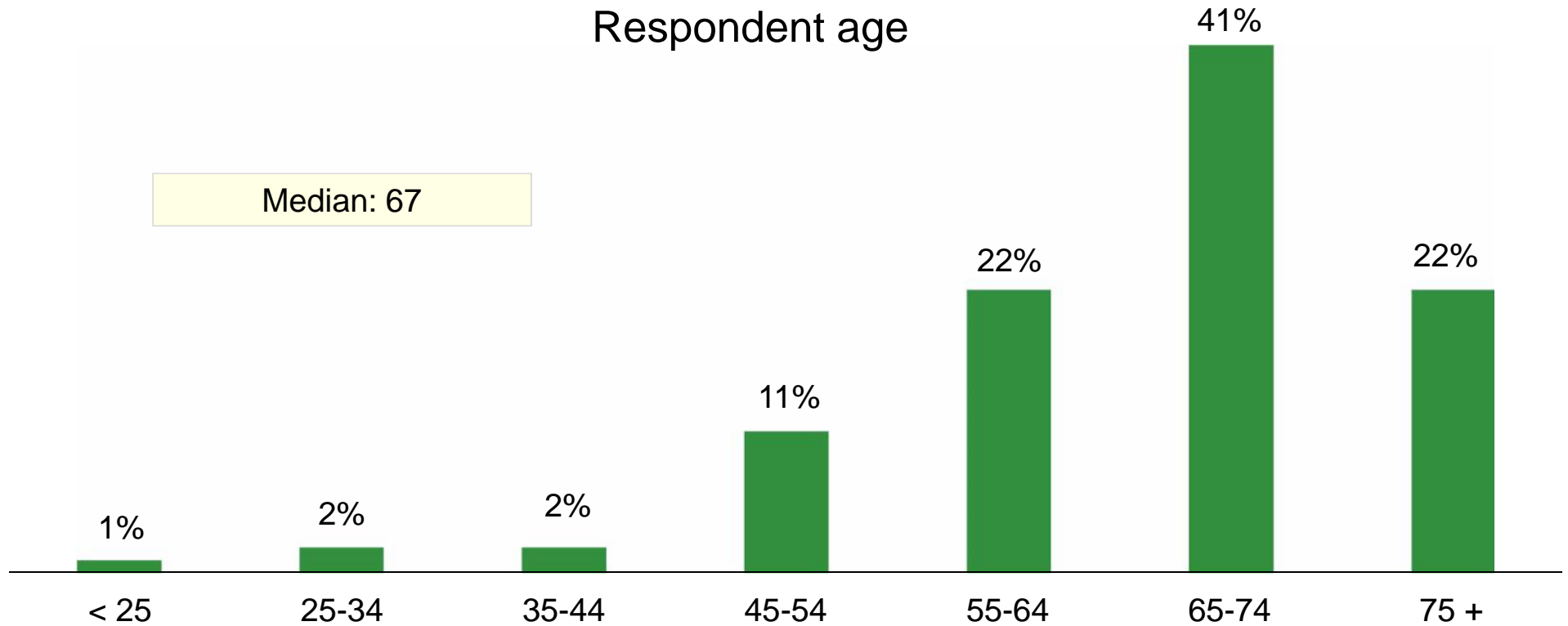
Median: 14 years



## Demographics



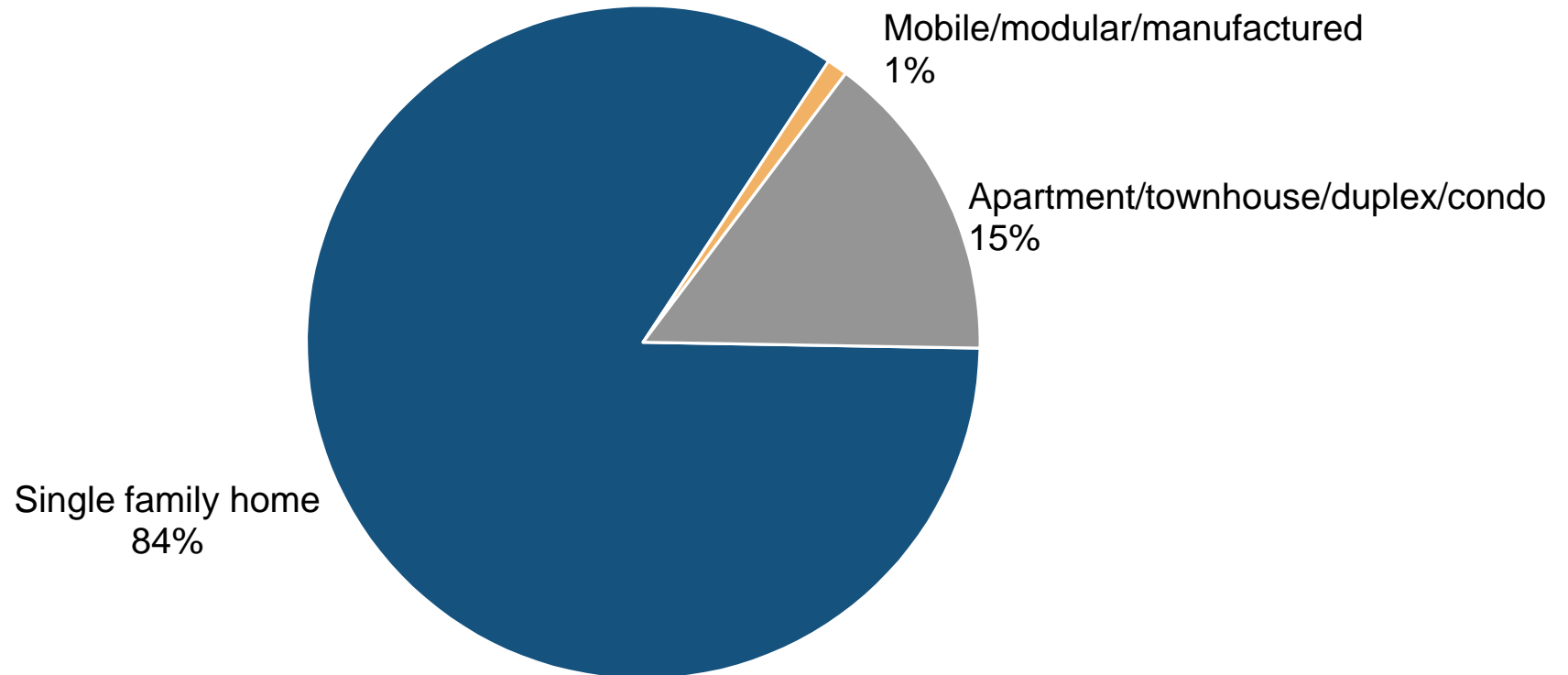
Respondent age



## Demographics



### Type of residence

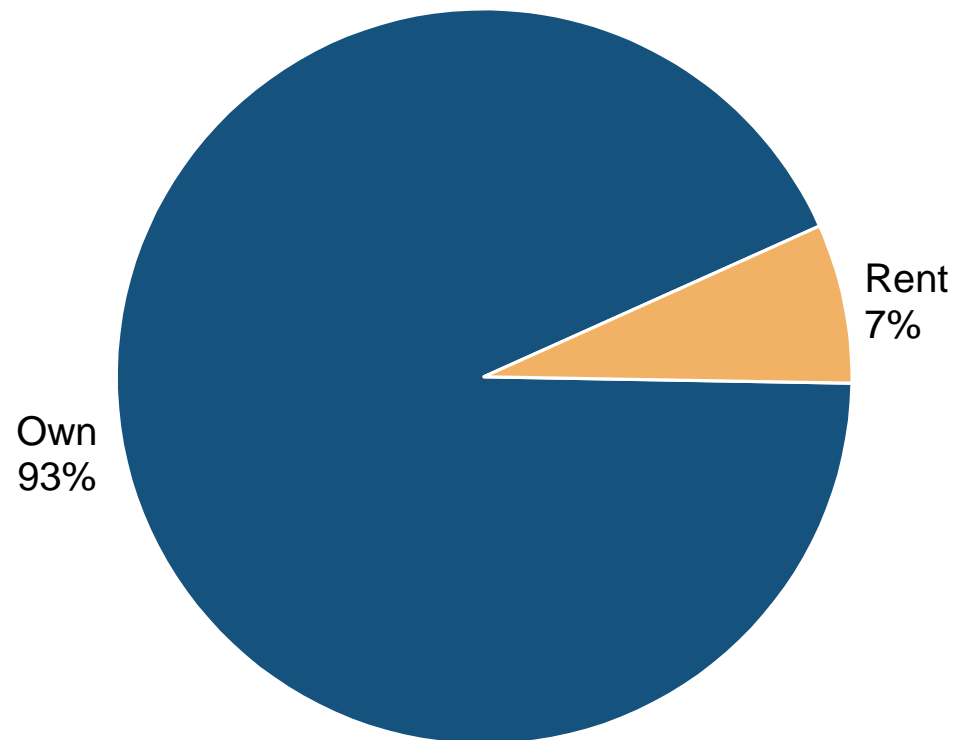




## Demographics



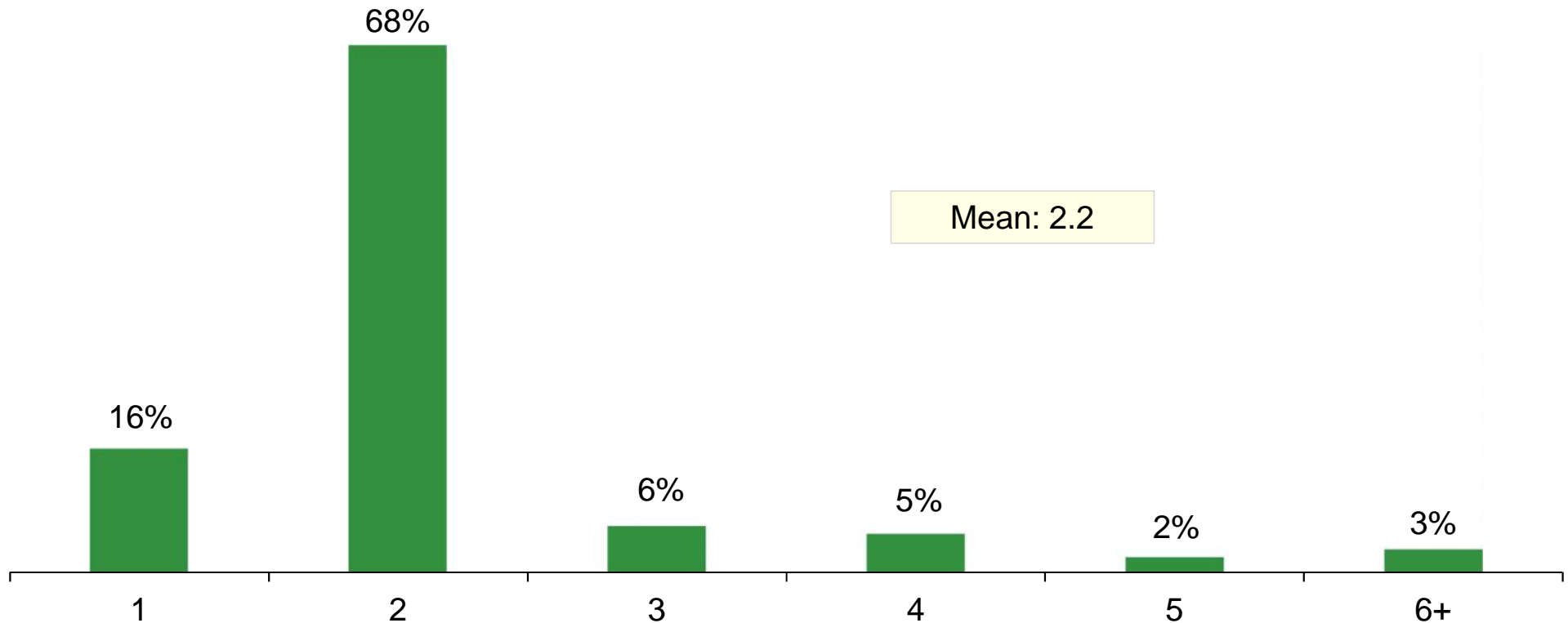
### Home ownership



## Demographics



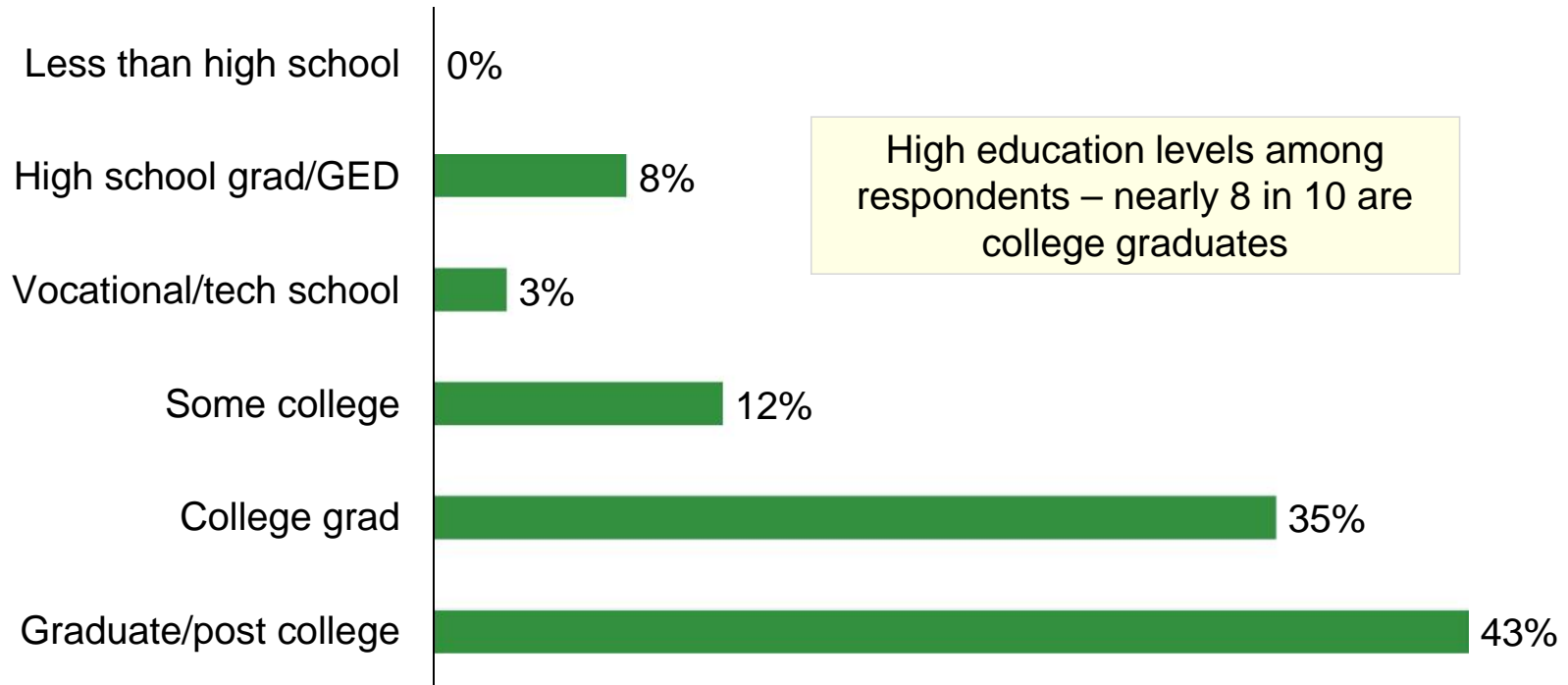
Number of residents per household



# Demographics



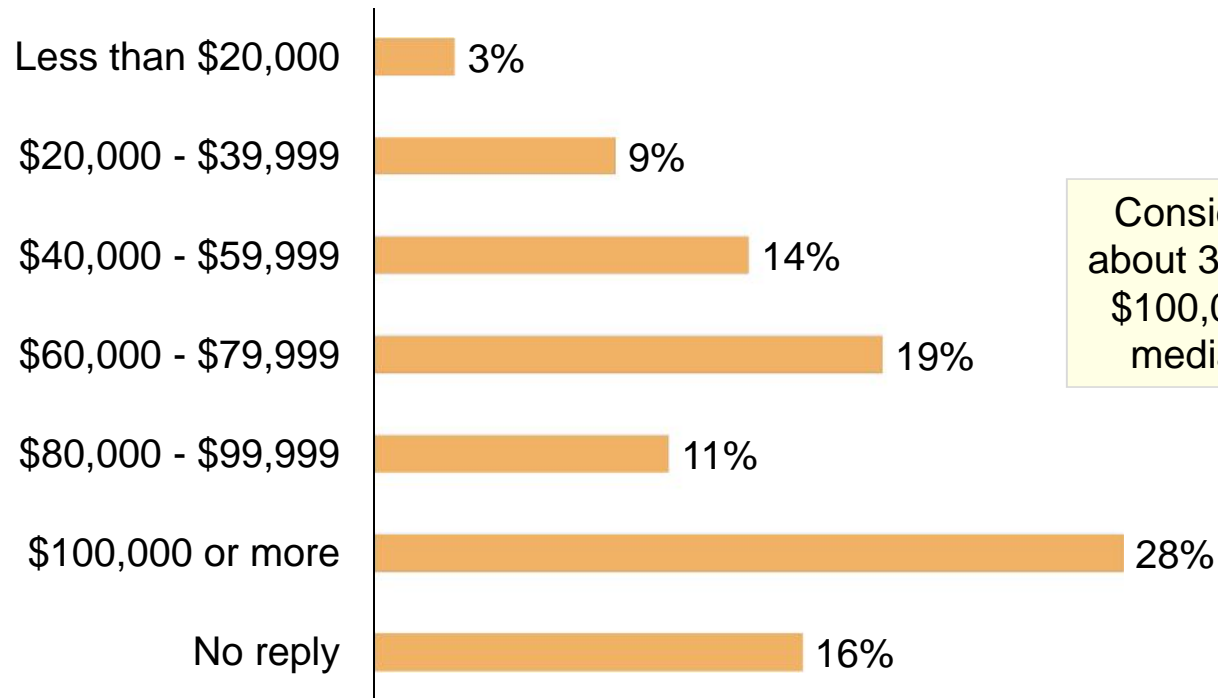
## Education



## Demographics



### Income

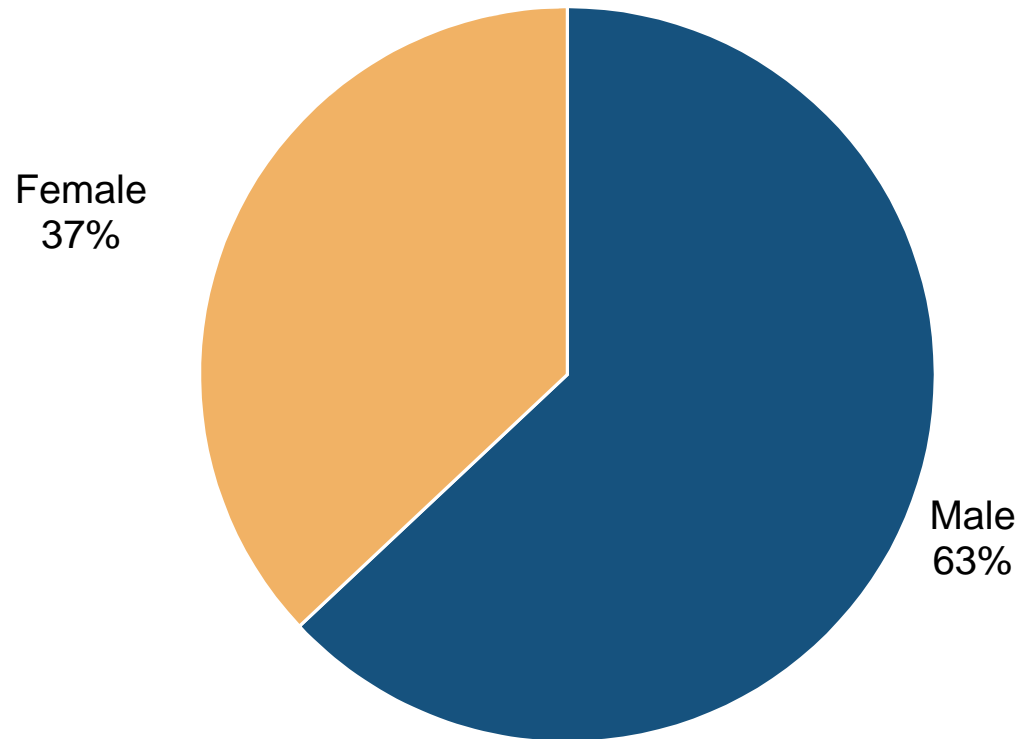


Considerable income levels,  
about 3 in 10 respondents earn  
\$100,000 or more per year –  
median income is \$77,271

## Demographics



### Gender



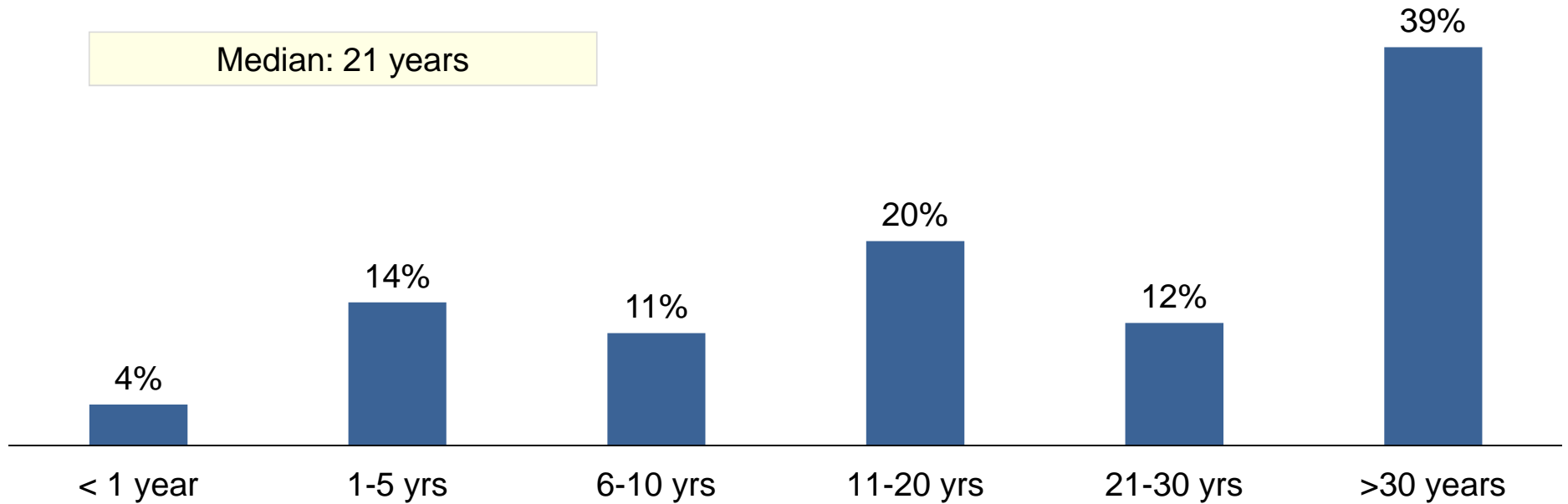


# Firmographics

## Firmographics



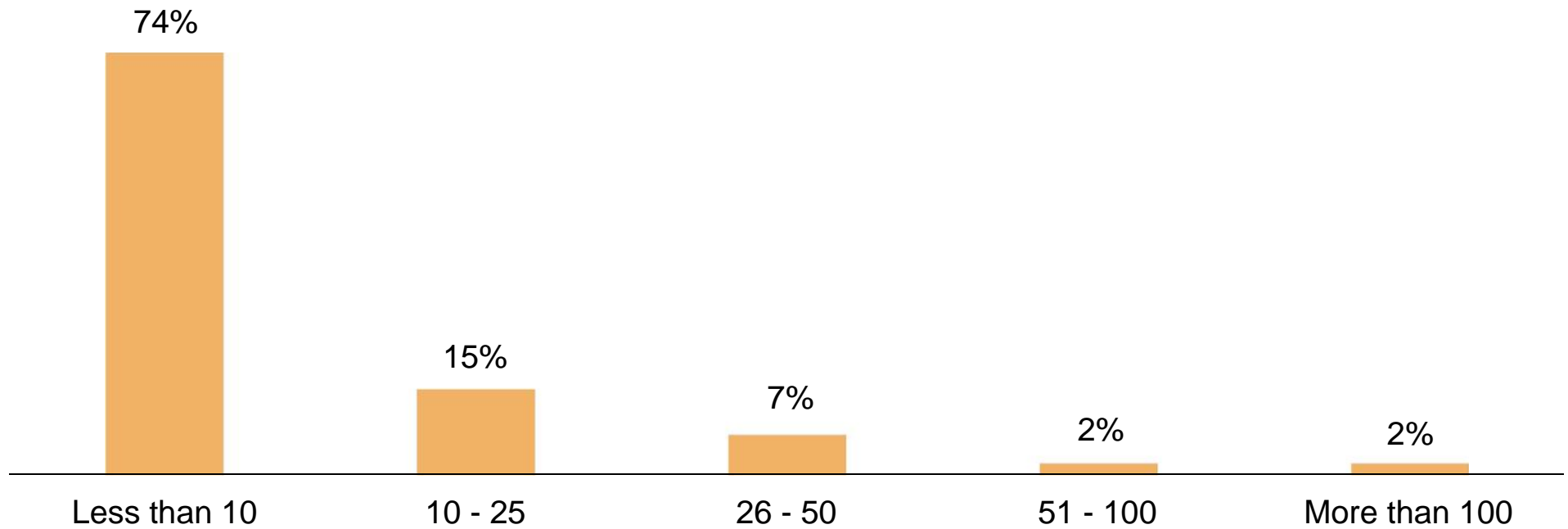
Length of service



## Firmographics



Number of employees

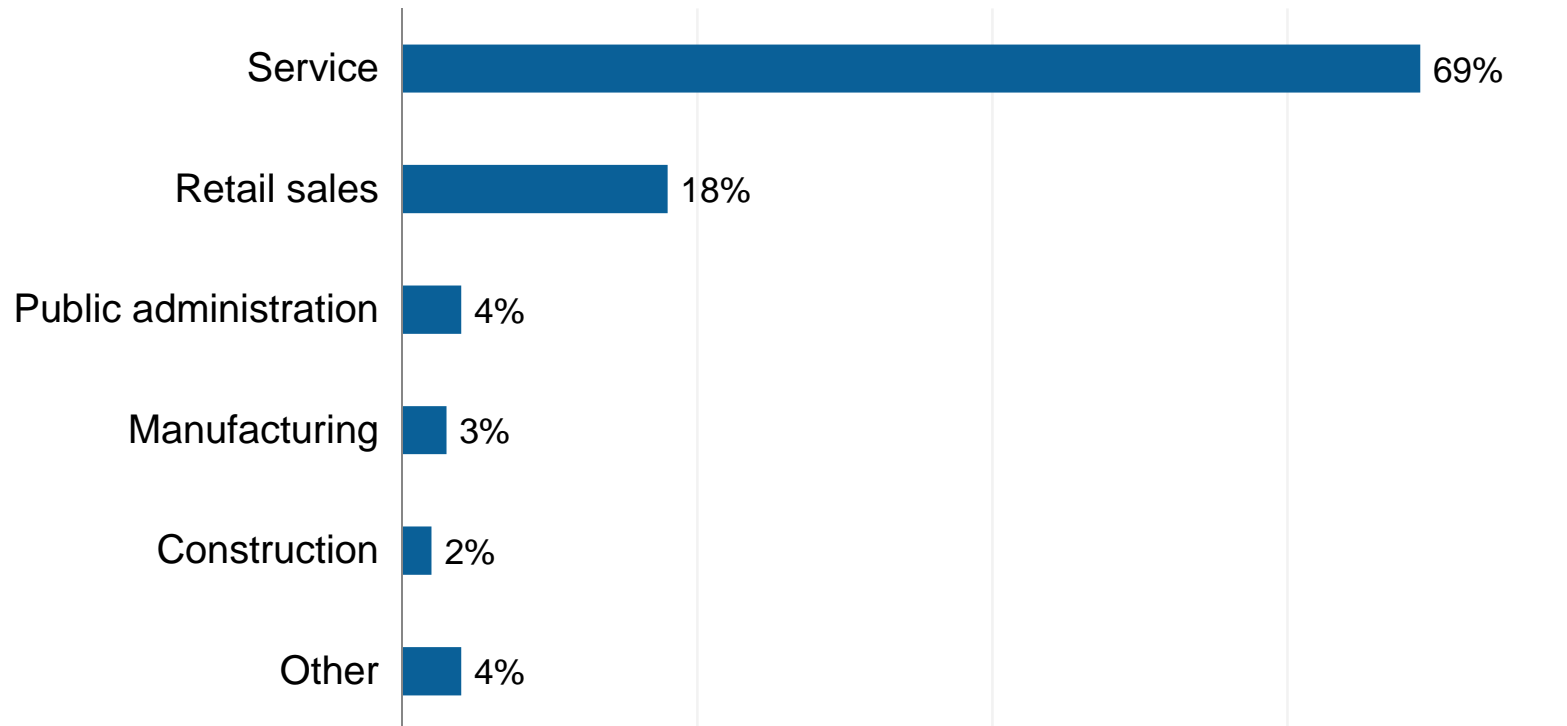




# Firmographics

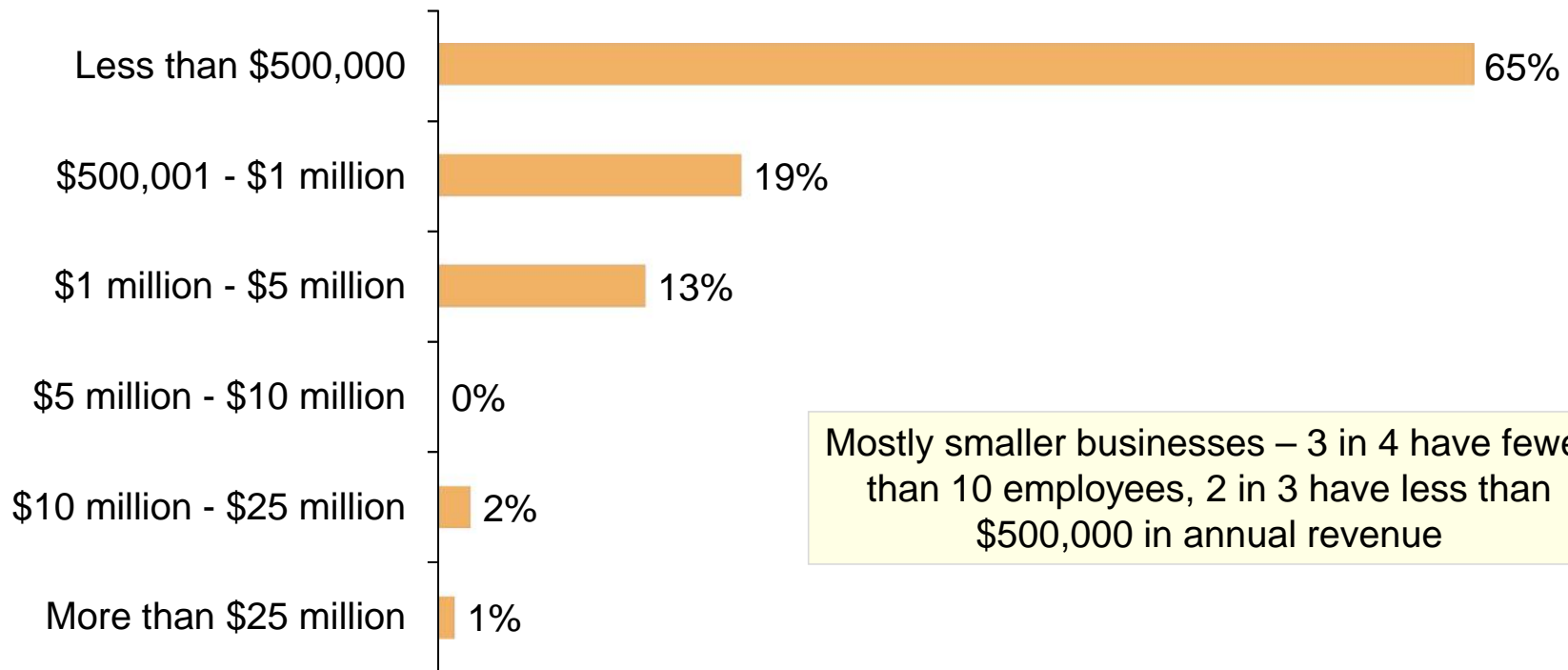


## Business type



## Firmographics

### Annual revenue

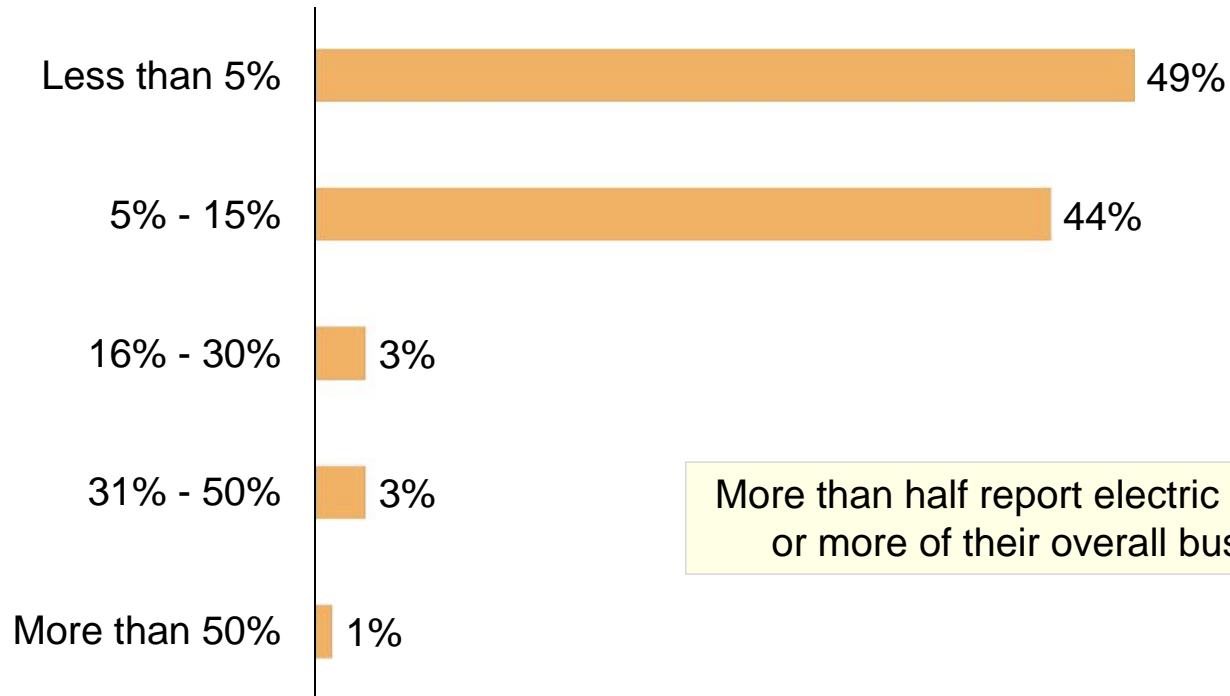


Mostly smaller businesses – 3 in 4 have fewer than 10 employees, 2 in 3 have less than \$500,000 in annual revenue

## Firmographics



### Electric costs as percentage of overall expense



More than half report electric costs as 5 percent or more of their overall business expense

## Customer Notification



### Your Opinion Counts!

As the wholesale power provider to Estes Park Light & Power, Platte River Power Authority seeks your input to help shape northern Colorado's energy future.

You have been selected to take part in this survey project to provide feedback about the future energy resources you want to power your homes and businesses.

**Complete the survey online anytime before November 12, 2018**



**Go to:**  
**[www.bit.ly/eplpres18](http://www.bit.ly/eplpres18)**  
and enter the survey ID shown  
at the top left on the reverse  
of this postcard



Customers who do not  
complete the survey online  
may receive a call inviting  
participation by phone



**Questions?**  
Call 970-577-3627

# Survey Questions



- › How long have you received electric service from Estes Park Light & Power?
- › Are you aware that Platte River Power Authority provides wholesale electricity generation and transmission services to Estes Park Light & Power?
- › Based on what you know, what is your opinion of Estes Park Light & Power?
- › Based on what you know, what is your opinion of Platte River Power Authority?
- › What resources do you think Platte River Power Authority uses to provide your municipality with electricity? (all that apply)
- › Please rate your level of agreement with the following statements regarding Estes Park Light & Power.
  - Shows concern for the environment
  - Offers adequate programs to help you use energy efficiently
- › Please rate your level of agreement with the following statements regarding Platte River Power Authority.
  - Shows concern for the environment
  - Offers adequate programs to help you use energy efficiently
- › How important is it to you that 100 percent of the energy you receive comes from renewable resources, such as hydro, solar and wind?
- › Please rate the importance of the following electric service characteristics:
  - Lowest possible cost
  - Reliable service
  - Renewable resource
- › Are you willing to pay more on your monthly bill to receive energy from renewable resources, and if so, how much more?

## Demographics (residential)

- › How old are you?
- › What type of residence do you live in?
- › Do you own or rent your home?
- › How many people live in your household?
- › What is the highest level of education you have completed?
- › What is your household income?
- › Respondent's gender

## Firmographics (commercial)

- › How many employees does your business have?
- › What type of business do you have?
- › What is the annual revenue of your business?
- › What is the percentage of electricity costs to your overall business costs?

## 2018 IRP Survey Results



	Online	Phone										
<b>Residential: Results based on 307 responses</b>	56%	44%										
<b>Commercial: Results based on 115 responses</b>	29%	71%										
<b>1. How long have you received electric service from Estes Park Light &amp; Power?</b>												
	<b>Residential</b>	<b>Commercial</b>										
Less than 1 year	4%	4%										
1 - 5 years	21%	14%										
6 - 10 years	13%	11%										
11 - 20 years	29%	20%										
21 - 30 years	13%	12%										
More than 30 years	21%	39%										
Median length of service	14	21										
<b>2. Are you aware that Platte River Power Authority provides wholesale electricity generation and transmission services to Estes Park Light &amp; Power?</b>												
	<b>Residential</b>	<b>Commercial</b>										
Yes	57%	58%										
No	43%	42%										
<b>3. Based on what you know, what is your opinion of Estes Park Light &amp; Power?</b>												
	Not at all favorable -----> Very favorable											
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
<b>Residential</b>	0%	1%	2%	0%	6%	3%	6%	21%	19%	41%	<b>8.52</b>	<b>81%</b>
<b>Commercial</b>	1%	1%	2%	1%	5%	4%	7%	22%	14%	44%	<b>8.47</b>	<b>80%</b>
<i>*Top Box = 8 - 10 ratings combined, or highest opinion.</i>												
<b>4. Based on what you know, what is your opinion of Platte River Power Authority?</b>												
	Not at all favorable -----> Very favorable											
	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
<b>Residential</b>	2%	1%	3%	1%	20%	4%	8%	20%	14%	28%	<b>7.55</b>	<b>62%</b>
<b>Commercial</b>	5%	0%	0%	0%	35%	4%	7%	12%	12%	24%	<b>7.02</b>	<b>48%</b>
<i>*Top Box = 8 - 10 ratings combined, or highest opinion.</i>												
<b>5. What resources do you think Platte River Power Authority uses to provide your municipality with electricity? (all that apply)</b>												
	<b>Residential</b>	<b>Commercial</b>										
Coal	52%	55%										
Hydropower	70%	60%										
Natural gas	52%	46%										
Solar power	39%	25%										
Wind power	51%	43%										

## 2018 IRP Survey Results



<b>6. Please rate your level of agreement with the following statements regarding Estes Park Light &amp; Power.</b>												
<i>*Top Box = 8 - 10 ratings combined, or strongest level of agreement.</i>												
	Strongly disagree -----> Strongly agree											
<b>Residential</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
Shows concern for the environment	2%	0%	2%	1%	20%	5%	13%	20%	13%	23%	<b>7.43</b>	<b>56%</b>
Offers adequate programs to help you use energy efficiently	2%	2%	4%	4%	22%	8%	13%	17%	9%	20%	<b>6.95</b>	<b>46%</b>
<b>Commercial</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
Shows concern for the environment	2%	4%	1%	2%	24%	8%	7%	19%	6%	26%	<b>7.15</b>	<b>51%</b>
Offers adequate programs to help you use energy efficiently	3%	5%	3%	1%	29%	8%	10%	15%	6%	21%	<b>6.68</b>	<b>42%</b>
<b>7. Please rate your level of agreement with the following statements regarding Platte River Power Authority.</b>												
<i>*Top Box = 8 - 10 ratings combined, or strongest level of agreement.</i>												
	Strongly disagree -----> Strongly agree											
<b>Residential</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
Shows concern for the environment	3%	1%	2%	1%	26%	8%	12%	17%	12%	18%	<b>7.01</b>	<b>47%</b>
Offers adequate programs to help you use energy efficiently	2%	1%	4%	4%	31%	8%	13%	14%	8%	15%	<b>6.54</b>	<b>37%</b>
<b>Commercial</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
Shows concern for the environment	2%	1%	2%	1%	36%	10%	8%	15%	7%	17%	<b>6.67</b>	<b>39%</b>
Offers adequate programs to help you use energy efficiently	3%	3%	1%	2%	44%	11%	4%	13%	5%	14%	<b>6.23</b>	<b>32%</b>
<b>8. How important is it to you that 100% of the energy you receive comes from renewable resources, such as hydro, solar and wind?</b>												
<i>*Top Box = 8 - 10 ratings combined, or highest importance.</i>												
	Not at all important -----> Very important											
<b>Residential</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
	11%	4%	5%	2%	9%	5%	9%	12%	12%	32%	<b>6.99</b>	<b>56%</b>
<b>Commercial</b>	12%	3%	4%	2%	12%	6%	13%	10%	9%	31%	<b>6.89</b>	<b>50%</b>
<b>9. Please rate the importance of the following electric service characteristics:</b>												
<i>*Top Box = 8 - 10 ratings combined, or most important.</i>												
	Not at all important -----> Very important											
<b>Residential</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
Lowest possible cost	1%	1%	3%	2%	12%	3%	9%	17%	11%	40%	<b>8.04</b>	<b>68%</b>
Reliable service	0%	0%	0%	0%	5%	1%	3%	12%	17%	62%	<b>9.22</b>	<b>91%</b>
Renewable resource	5%	4%	4%	2%	10%	4%	7%	16%	10%	37%	<b>7.49</b>	<b>63%</b>
<b>Commercial</b>	<b>1</b>	<b>2</b>	<b>3</b>	<b>4</b>	<b>5</b>	<b>6</b>	<b>7</b>	<b>8</b>	<b>9</b>	<b>10</b>	<b>Average</b>	<b>Top Box</b>
Lowest possible cost	2%	0%	1%	0%	11%	6%	13%	6%	12%	49%	<b>8.37</b>	<b>67%</b>
Reliable service	0%	0%	0%	0%	3%	2%	2%	4%	23%	67%	<b>9.43</b>	<b>94%</b>
Renewable resource	9%	2%	4%	3%	7%	6%	12%	12%	12%	34%	<b>7.34</b>	<b>58%</b>

## 2018 IRP Survey Results



10. Are you willing to pay more on your monthly bill to receive energy from renewable resources, and if so, how much more?											
	Residential				Commercial						
Not willing to pay more	41%			Not willing to pay more	47%						
\$5 to \$10 per month	36%			1% to 5% per month	24%						
\$11 to \$20 per month	13%			6% to 10% per month	14%						
\$21 to \$30 per month	4%			11% to 20% per month	4%						
More than \$30 per month	7%			More than 20% per month	2%						
				Unsure/unknown	10%						
Demographics											
D1. How old are you?											
Under 25	1%			45 - 54	11%		75+	22%			
25 - 34	2%			55 - 64	22%						
35 - 44	2%			65 - 74	41%						
Median age: 67											
D2. What type of residence do you live in?											
Single-family home	84%										
Mobile, modular or manufactured home	1%										
Apartment, townhouse, duplex or condominium	15%										
D3. Do you own or rent your home?											
	Own	93.0%		Rent	7.0%						
D4. How many people live in your household?											
	1	2	3	4	5	6+					
	16%	68%	6%	5%	2%	3%		Average:	2.18		



## 2018 IRP Survey Results



<b>D5. What is the highest level of education you have completed?</b>											
Less than high school	0%				Some college	12%					
High school graduate/GED	8%				College graduate	35%					
Vocational-technical school	3%				Graduate or post-college school	43%					
<b>D6. What is your household income?</b>											
Less than \$20,000	3%				\$80,000 to \$99,999	11%					
\$20,000 to \$39,999	9%				\$100,000 or more	28%					
\$40,000 to \$59,999	14%				No response	16%					
\$60,000 to \$79,999	19%										
Median income: \$77,271											
<b>D7. Respondent's gender</b>											
Male	63%				Female	37%					

## 2018 IRP Survey Results



Firmographics													
<b>F1. How many employees does your business have?</b>													
Less than 10	74%												
10 to 25	15%												
26 to 50	7%												
51 to 100	2%												
More than 100	2%												
<b>F2. What type of business do you have?</b>													
Service	69%					Agriculture	0%						
Retail sales	18%					Mining or refining	0%						
Wholesale sales	0%					Transportation	0%						
Manufacturing	3%					Public administration	4%						
Construction	2%					Other	4%						
<b>F3. What is the annual revenue of your business?</b>													
Less than \$500,000	65%												
\$500,001 to \$1 million	19%												
\$1 million to \$5 million	13%												
\$5 million to \$10 million	0%												
\$10 million to \$25 million	2%												
More than \$25 million	1%												
<b>F4. What is the percentage of electricity costs to your overall business costs?</b>													
Less than 5%	49%												
5% to 15%	44%												
16% to 30%	3%												
31% to 50%	3%												
More than 50%	1%												