



Platte River
Power Authority

Estes Park • Fort Collins • Longmont • Loveland

2018 Integrated Resource Plan Survey Results

Conducted by:



(a solutions company)



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2018 Integrated Resource Plan Survey



Scope and Methodology

During the fall of 2018, Platte River Power Authority, in coordination with Longmont Power & Communications, 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 263 randomly-selected residential customers and 142 commercial customers. The results of the residential survey have a margin of error of ± 6.0 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 6.0 percent in the actual total population. The results of the commercial survey have a margin of error of ± 7.7 percent.

Of the 263 residential survey completions, 220 (84 percent) were completed online by customers responding to a postcard mailing or email notice. Following the online completions, 43 (16 percent) surveys were completed by callers conducting phone interviews. In completing the 43 phone surveys there were 9 refusals or disconnects, for a refusal rate of 17 percent. Of the 142 commercial survey completions, 24 (17 percent) were completed online, and 118 (83 percent) were completed by phone. In completing the 118 phone surveys there were 13 refusals or disconnects, for a refusal rate of 10 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.[®], 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

- 6 in 10 residential customers are aware Platte River provides electricity generation and transmission services to their utility – only 4 in 10 commercial customers are aware
- 57% of residential customers and 43% of commercial customers rate Platte River somewhat or very favorably
- Customers who are aware Platte River provides G&T services to their utility rate Platte River higher in overall favorability, showing concern for the environment, and offering adequate energy efficiency programs
- At least two-thirds of residential customers are aware Platte River uses coal, hydropower, natural gas and wind power for generation, about half aware of solar
- Lower awareness of the resources Platte River uses among commercial customers – only 1 in 3 are aware of hydro and solar power, half are aware of wind power



Renewable Resource Options

- More residential customers (69 percent) than commercial customers (49 percent) say it is somewhat or very important that 100 percent of the electricity they receive comes from renewable resources
- Both groups place similar priority on service reliability and receiving electricity at the lowest possible cost
- About 6 in 10 residential customers are willing to pay \$5 to \$20 per month more for electricity generated from renewable resources – 3 in 10 are unwilling to pay more
- Nearly half of commercial customers are willing to pay 1 percent to 10 percent more per month for renewable energy – more than 1 in 3 are not willing to pay more



Demographics

- Mostly middle-aged and older respondents to the residential survey – median age is 55, median length of service is 12 years
- Considerable education and income levels – 3 in 4 residential respondents have a college degree, more than half earn \$80,000 or more per year



Firmographics

- Median length of service for commercial customers is 17 years – about 3 in 4 of the businesses have less than 10 employees
- More service businesses responding (66 percent) to the commercial survey, followed by retail sales (15 percent) and manufacturing (7 percent)
- 3 in 4 businesses have annual revenue of less than \$500,000, nearly 4 in 10 report electric costs as 5 percent or more of their overall business expense



Integrated Resource Plan Survey Results

2018

Overview

Integrated Resource Plan Survey 2018



During the fall of 2018, Platte River Power Authority, in conjunction with Longmont Power and Communications, 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 263 residential end users and 142 commercial responses.

Highlights

6 in 10 residential customers are aware Platte River Power Authority provides electricity generation and transmission services to their utility – only 4 in 10 commercial customers are aware

57% of residential customers and 43% of commercial customers rate Platte River 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

At least two-thirds of residential customers are aware Platte River Power Authority uses coal, hydropower, natural gas and wind power for generation, about half are aware of solar

Lower awareness of the resources Platte River Power Authority uses among commercial customers – only 1 in 3 are aware of hydro and solar power, half are aware of wind power

More residential customers (69 percent) than commercial customers (49 percent) say it is somewhat or very important that 100 percent of the electricity they receive comes from renewable resources

Both groups place similar priority on service reliability and receiving electricity at the lowest possible cost

Highlights

About 6 in 10 residential customers are willing to pay \$5 to \$20 per month more on their bill for electricity generated from renewable resources – 3 in 10 are not willing to pay more

Nearly half of commercial customers are willing to pay 1 percent to 10 percent more per month for renewable energy – more than 1 in 3 are not willing to pay more

Mostly middle-aged and older respondents to the residential survey – median age is 55, median length of service is 12 years

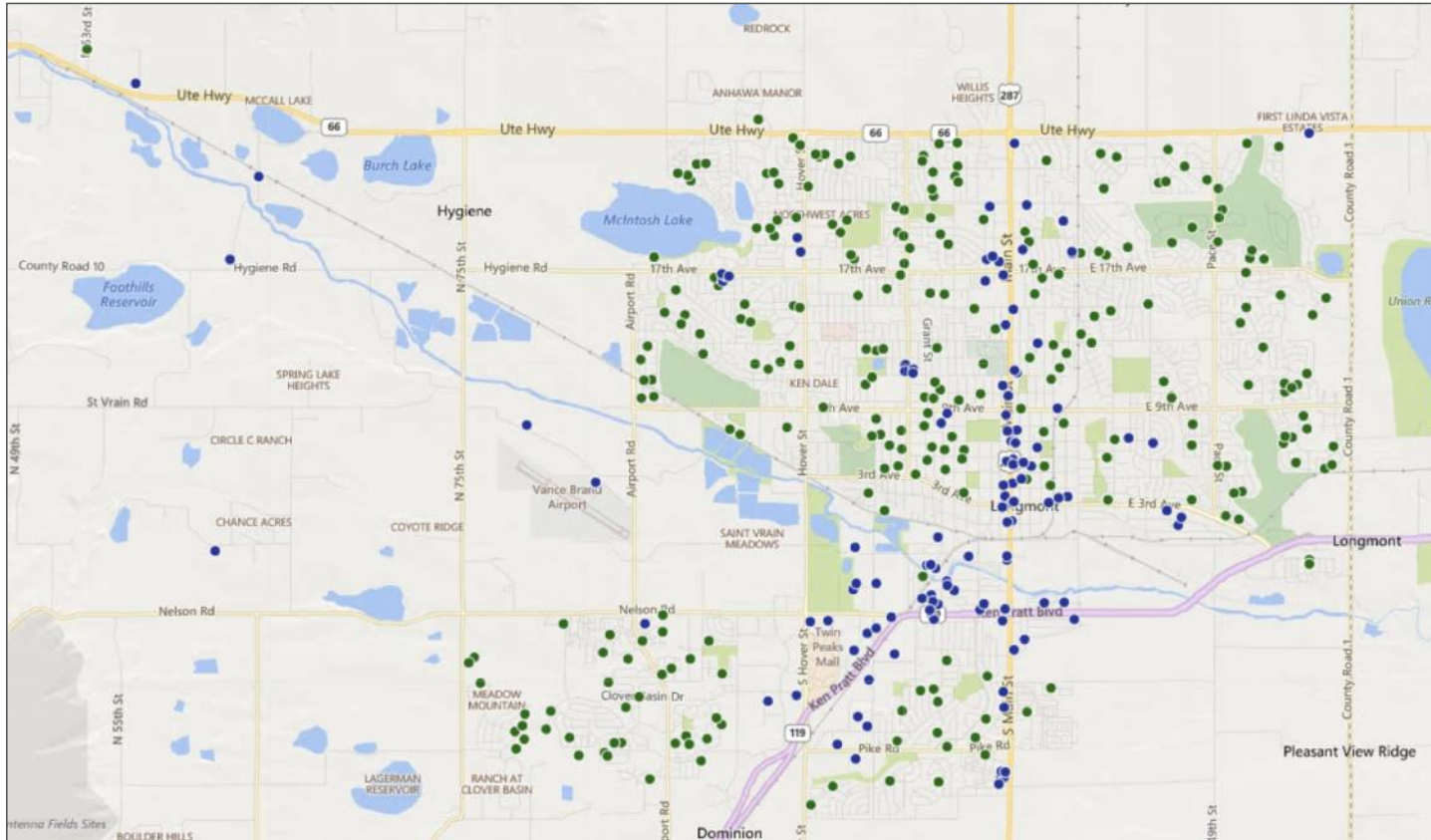
Considerable education and income levels – 3 in 4 residential respondents have a college degree, more than half earn \$80,000 or more per year

Median length of service for commercial customers is 17 years – about 3 in 4 of the businesses have less than 10 employees

More service businesses responding (66 percent) to the commercial survey, followed by retail sales (15 percent) and manufacturing (7 percent)

3 in 4 businesses have annual revenue of less than \$500,000, nearly 4 in 10 report electric costs as 5 percent or more of their overall business expense

Respondents

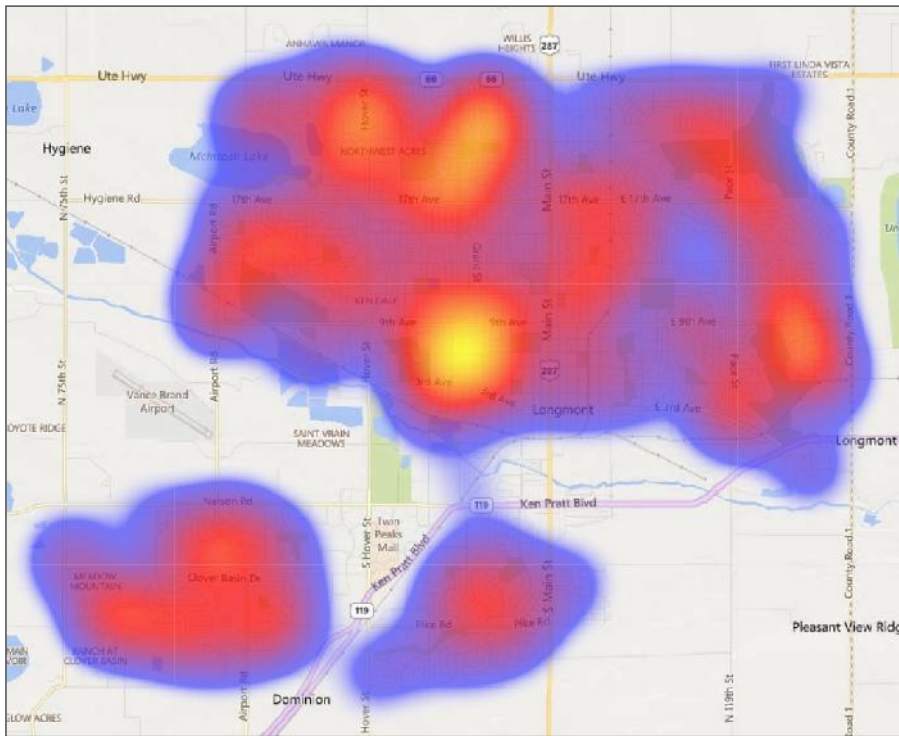


- Residential
- Commercial

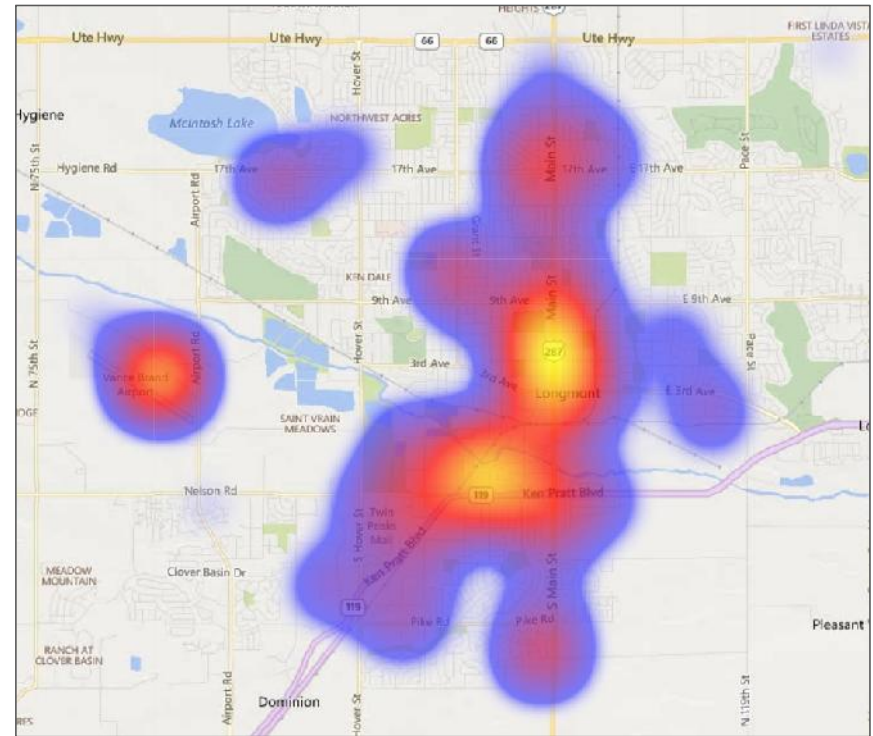
Respondents

Response Density

Residential



Commercial

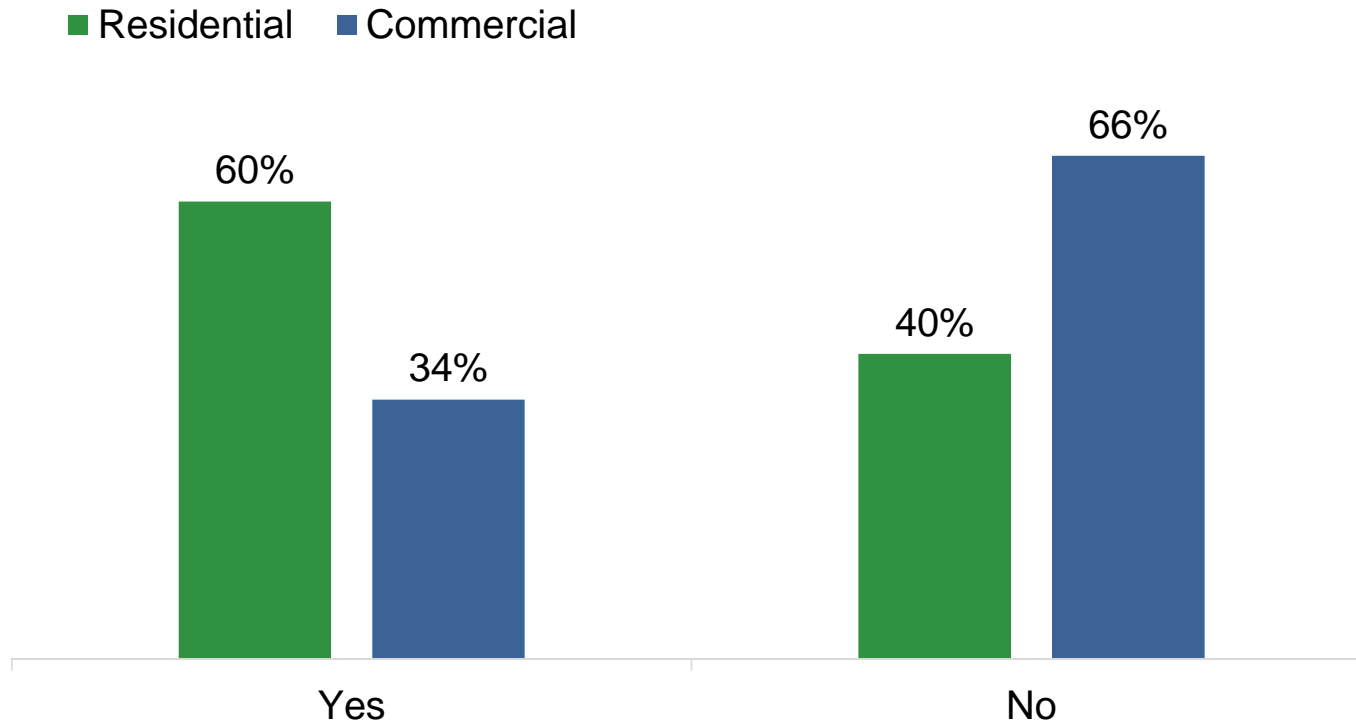




Platte River Power Authority

Platte River Power Authority

Aware Platte River Power Authority provides generation



Platte River Power Authority

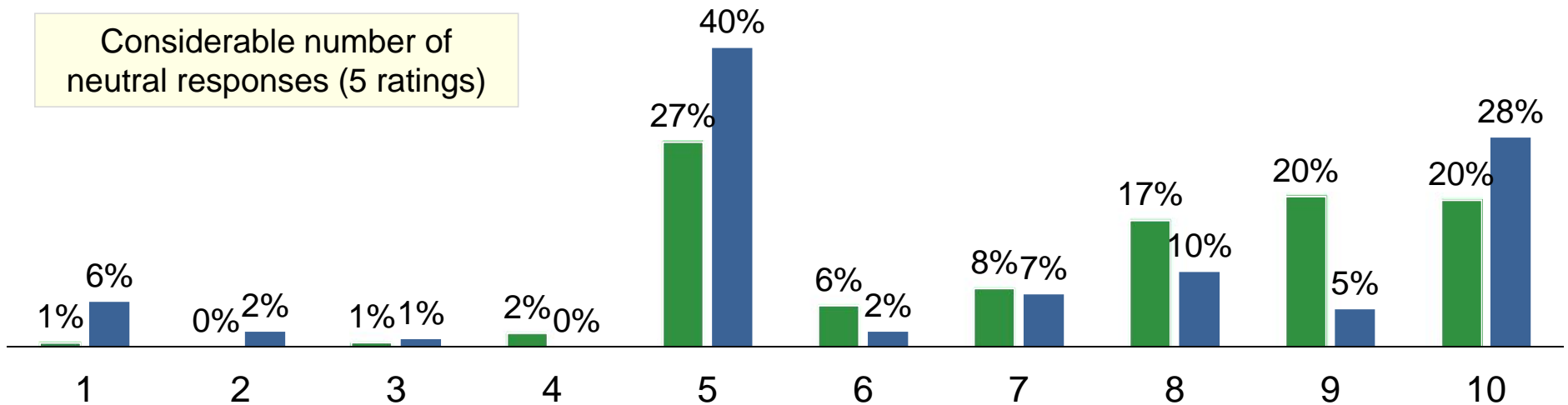


Opinion of Platte River Power Authority

■ Residential ■ Commercial

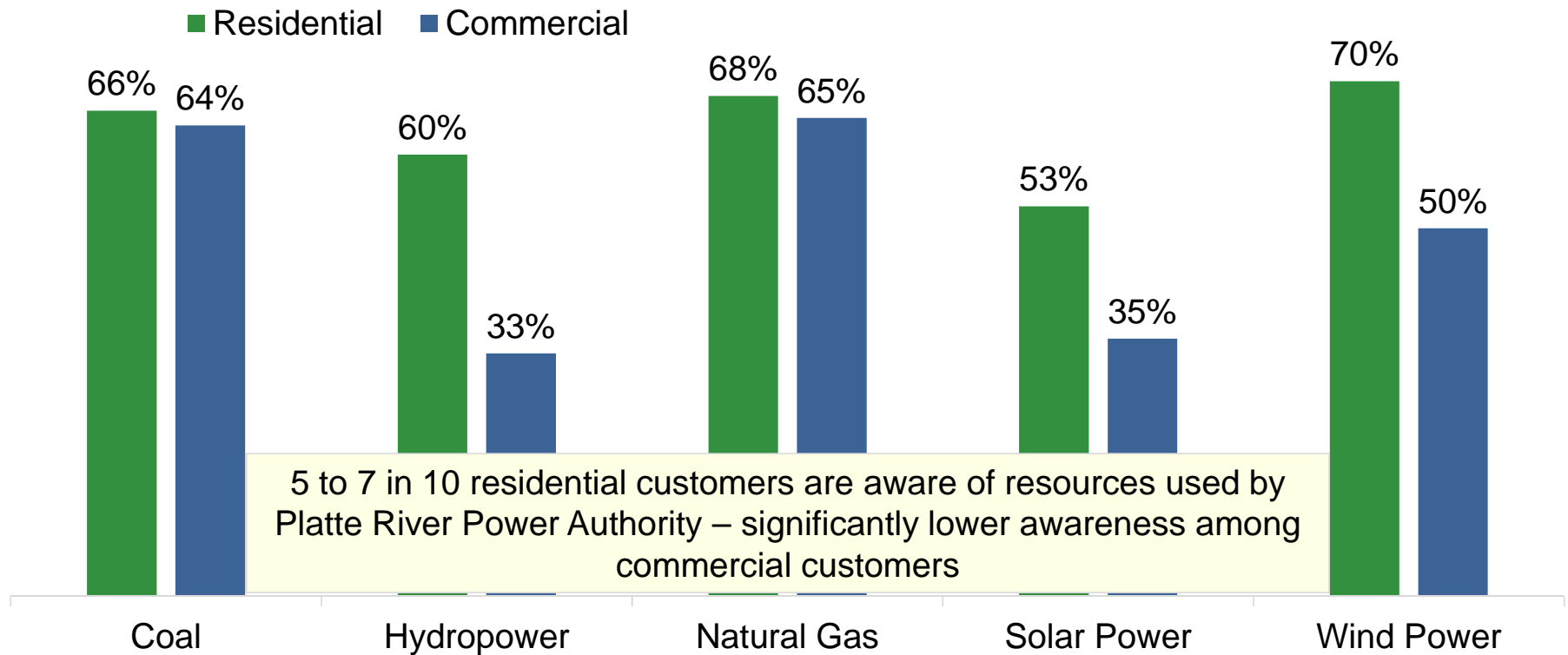
	Residential	Commercial
Top box (8-10 ratings)	57%	43%
Bottom box (1-3 ratings)	1%	9%
Mean	7.5	6.7

Considerable number of neutral responses (5 ratings)



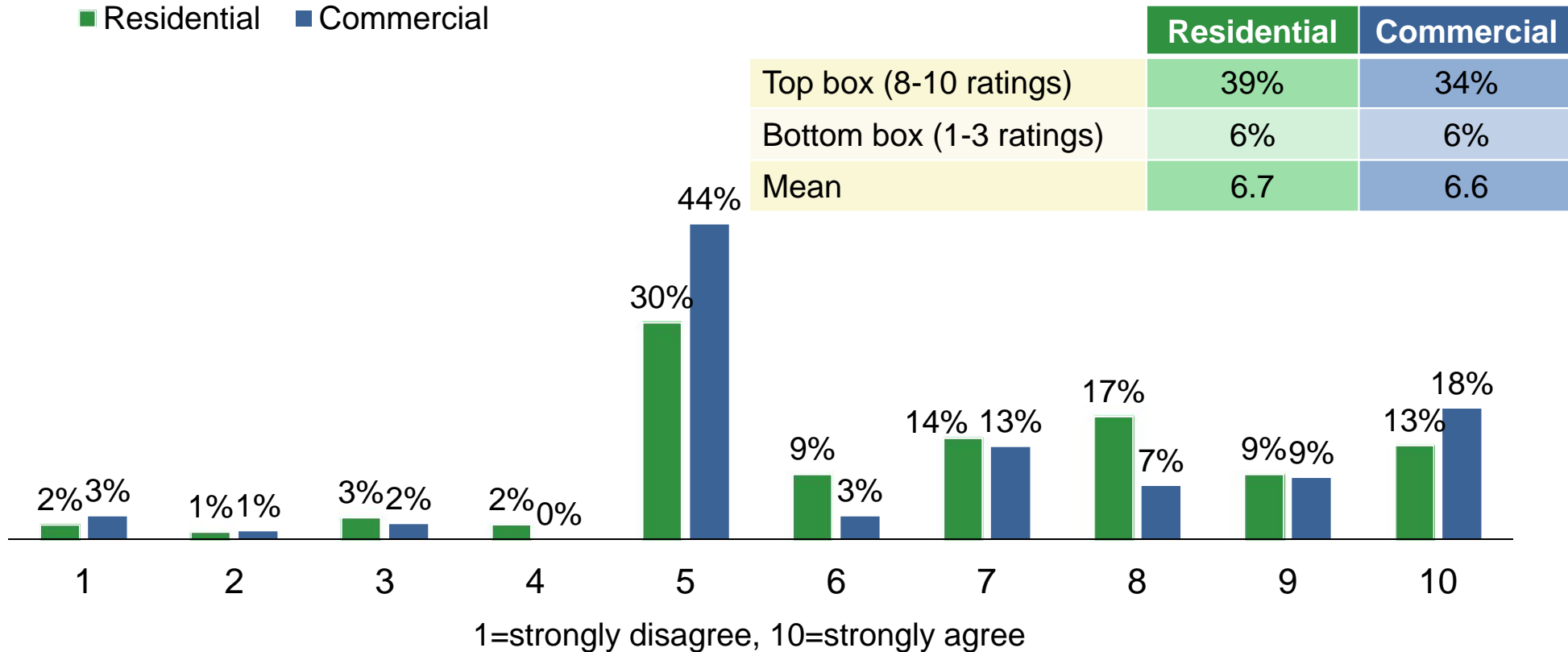
1=not at all favorable, 10=very favorable

Resources used by Platte River Power Authority



Platte River Power Authority shows concern for the environment

■ Residential ■ Commercial



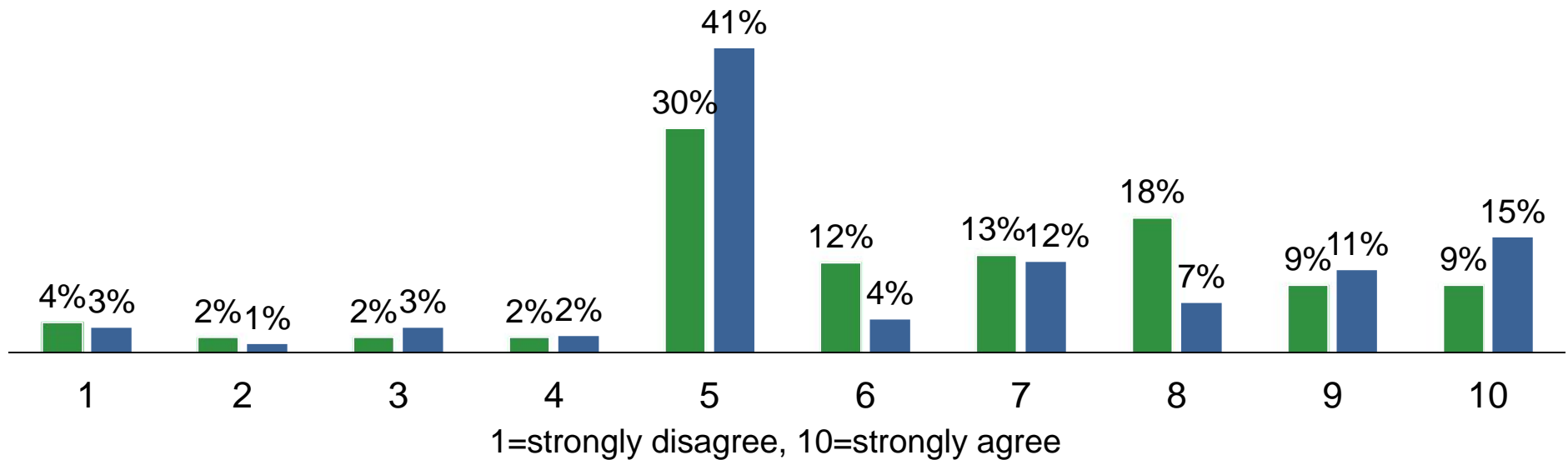
Platte River Power Authority



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

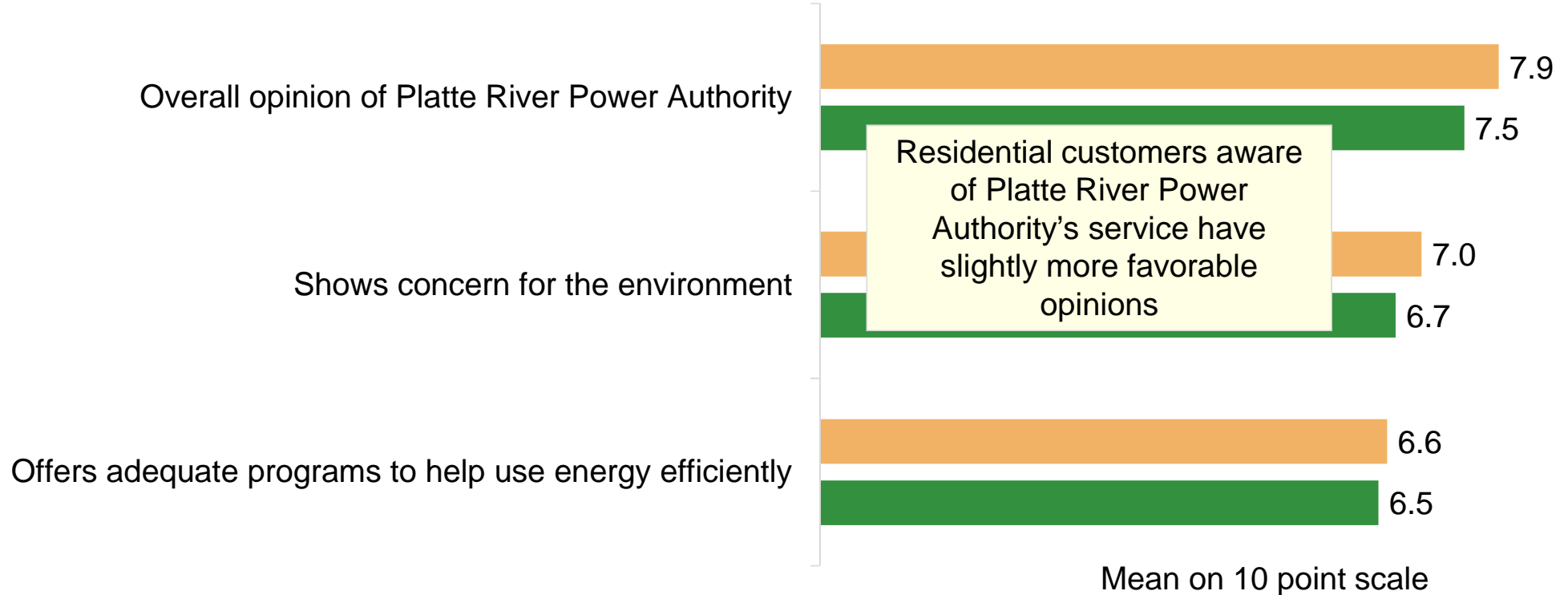
■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	36%	33%
Bottom box (1-3 ratings)	8%	7%
Mean	6.5	6.4



Opinion comparison - residential

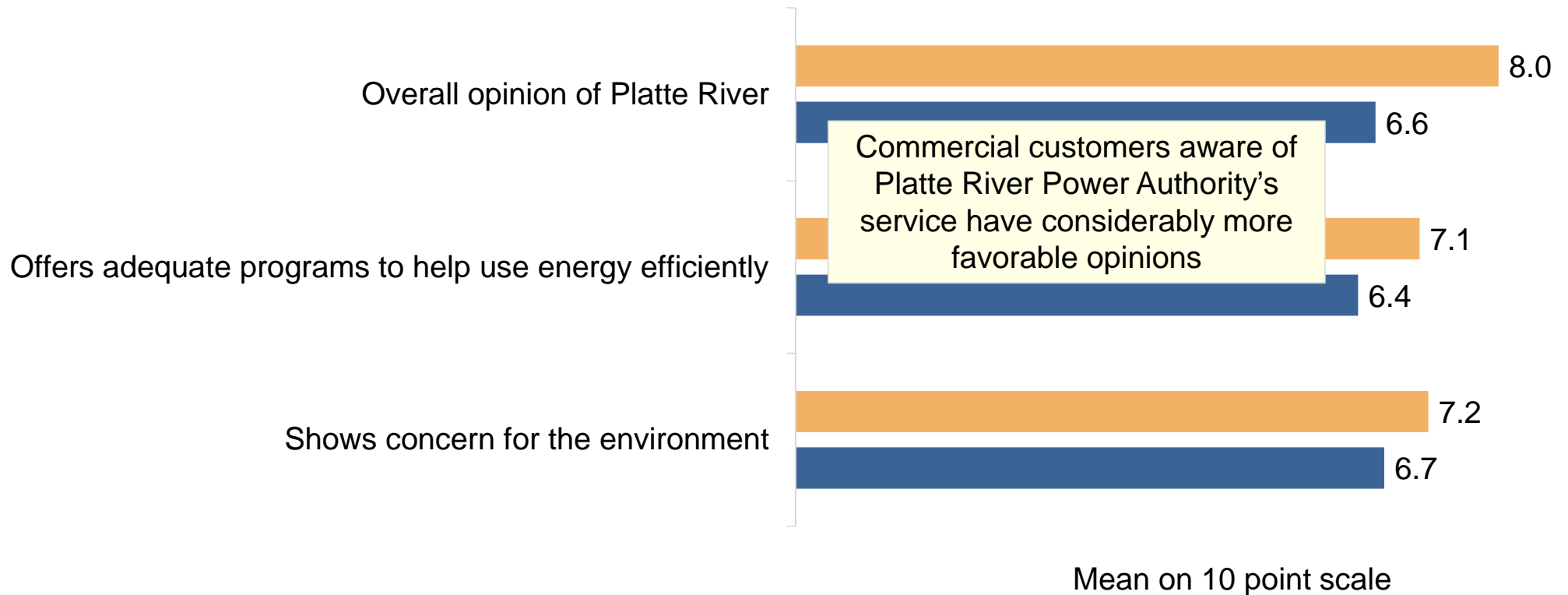
■ Those aware Platte River Power Authority provides electricity ■ Overall

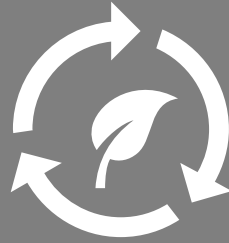


Platte River Power Authority

Opinion comparison - commercial

■ Those aware Platte River Power Authority provides electricity ■ Overall





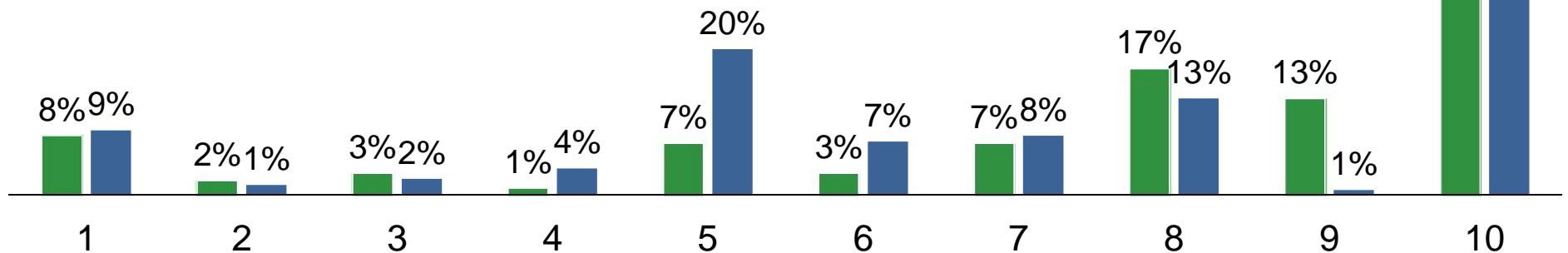
Renewable Resource Opinions

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)	69%	49%
Bottom box (1-3 ratings)	13%	12%
Mean	7.7	7.0



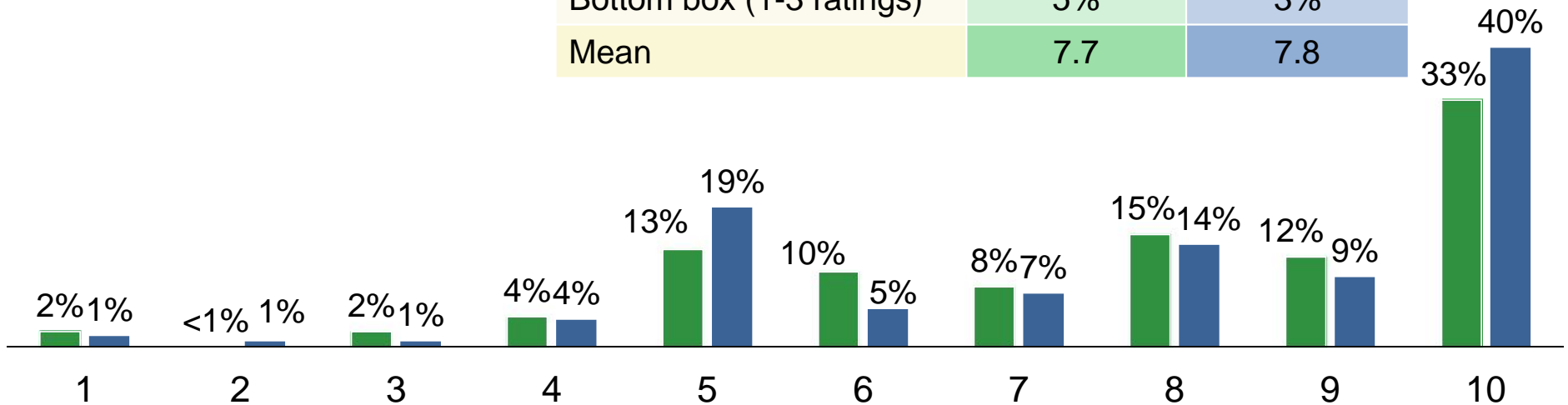
1=not at all important, 10=very important

Renewables

Importance of lowest possible cost

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	60%	63%
Bottom box (1-3 ratings)	5%	3%
Mean	7.7	7.8



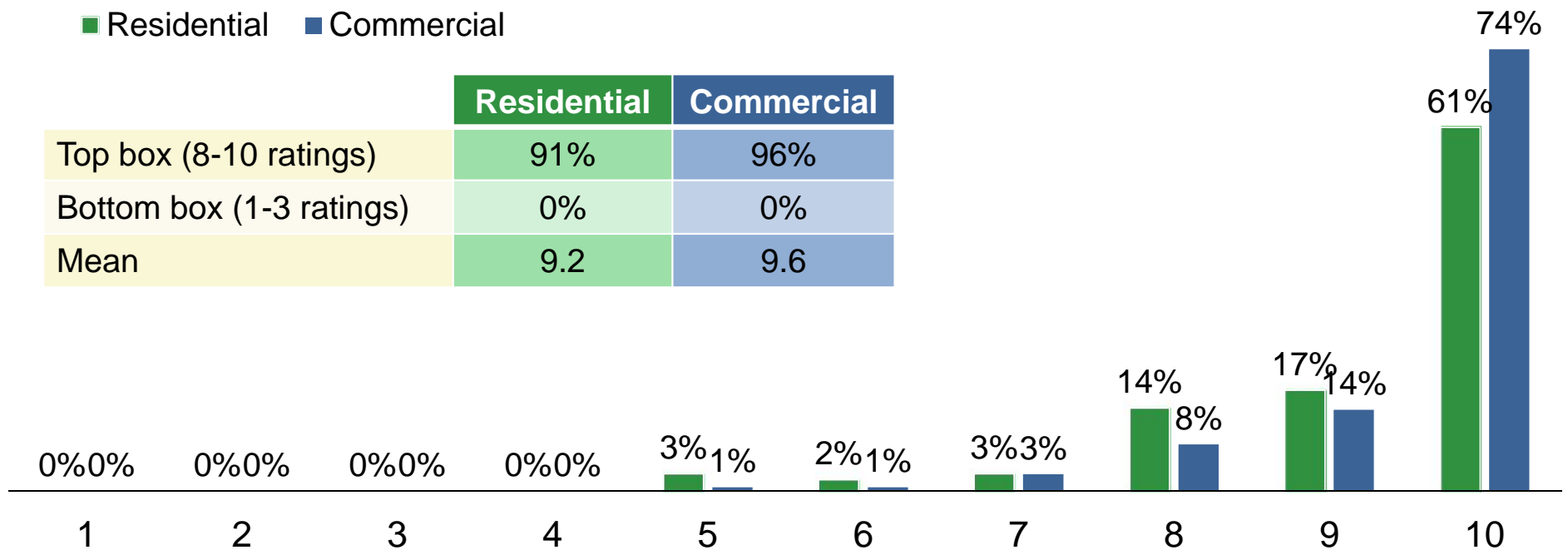
1=not at all important, 10=very important

Renewables

Importance of reliable service

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	91%	96%
Bottom box (1-3 ratings)	0%	0%
Mean	9.2	9.6



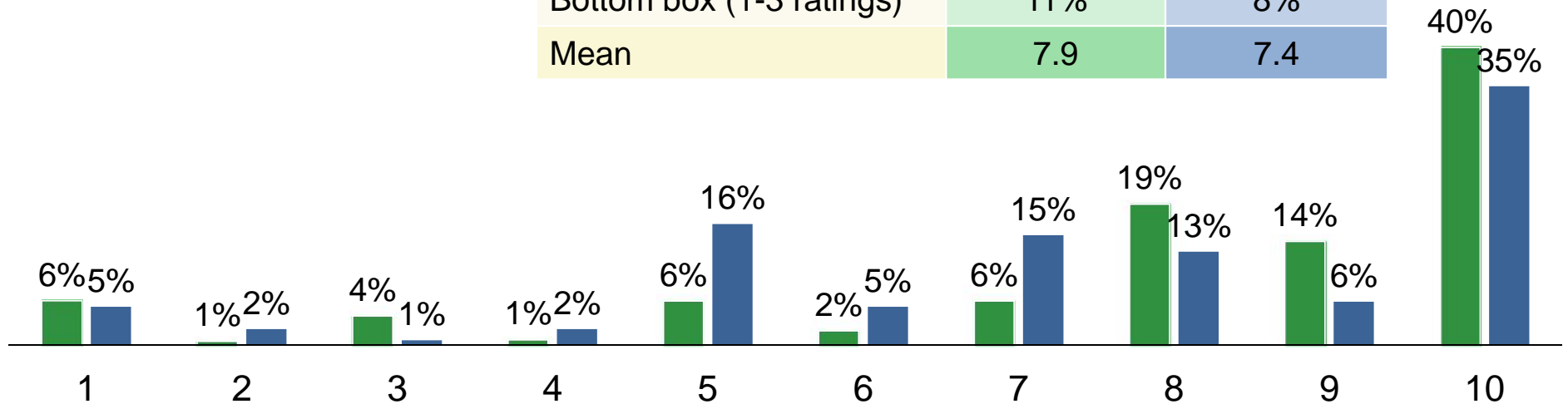
1=not at all important, 10=very important

Renewables

Importance of renewable resources

■ Residential ■ Commercial

	Residential	Commercial
Top box (8-10 ratings)	73%	53%
Bottom box (1-3 ratings)	11%	8%
Mean	7.9	7.4

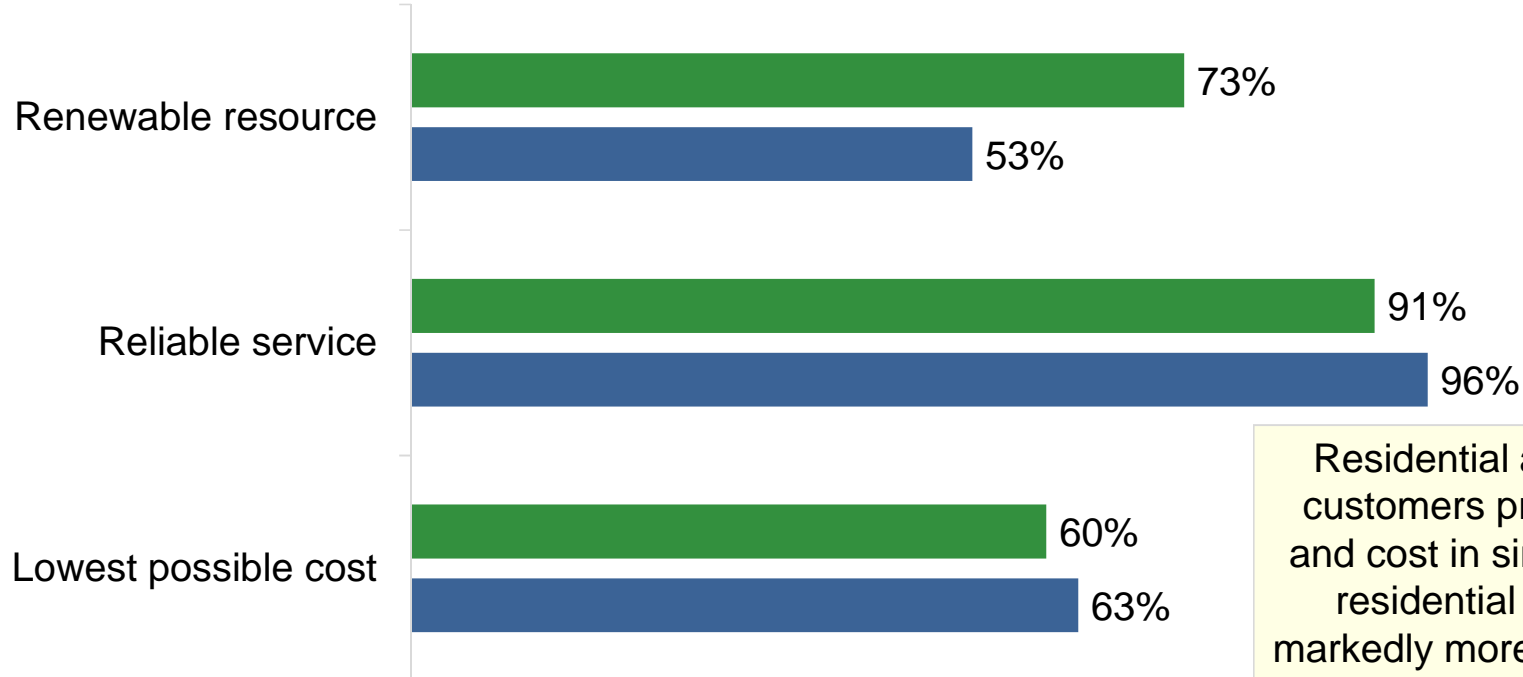


1=not at all important, 10=very important

Renewables

Service characteristics importance

■ Residential ■ Commercial

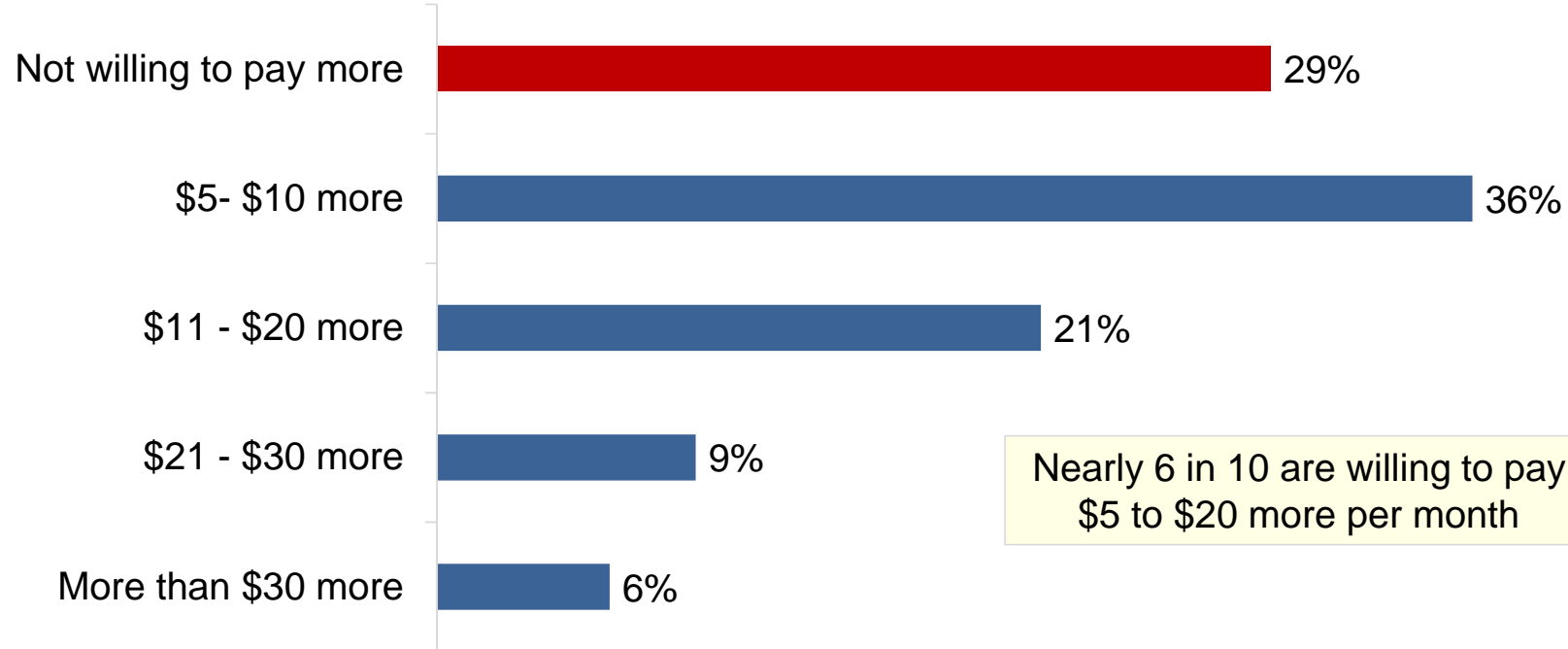


Residential and commercial customers prioritize reliability and cost in similar measures – residential customers are markedly more concerned about the utilization of renewables

Somewhat or very important (8-10 ratings)

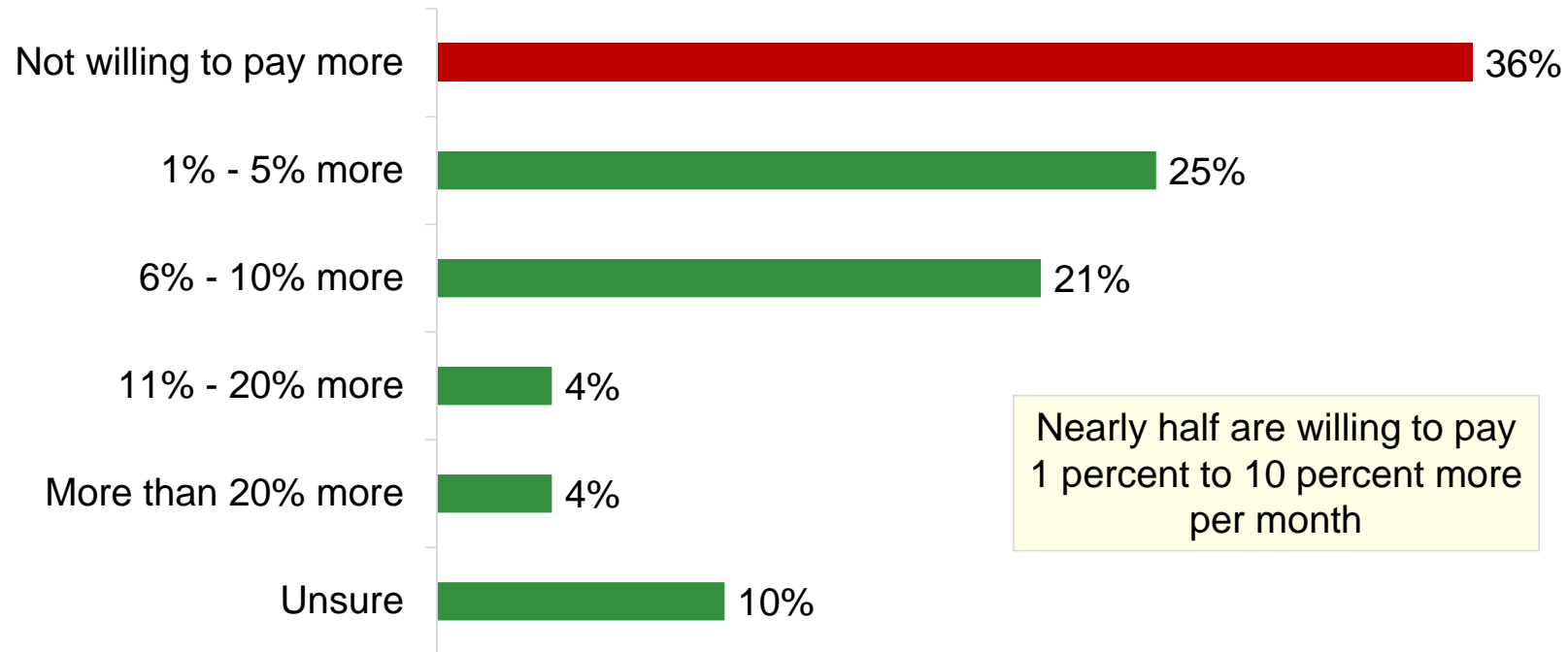
Renewables

Additional monthly amount willing to pay for renewable energy - residential



Renewables

Additional monthly amount willing to pay for renewable energy - commercial



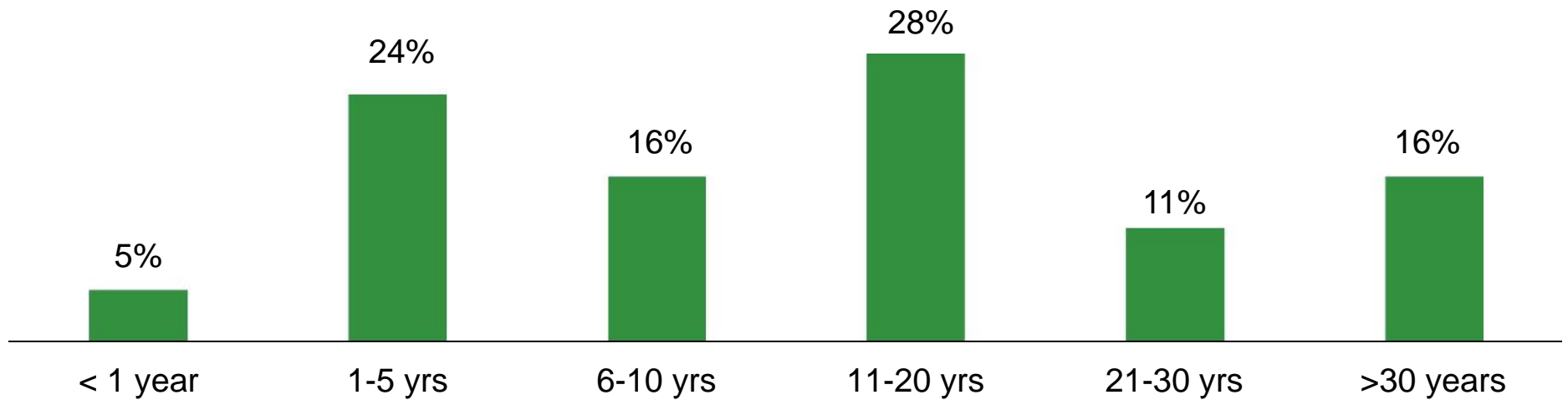


Demographics

Demographics

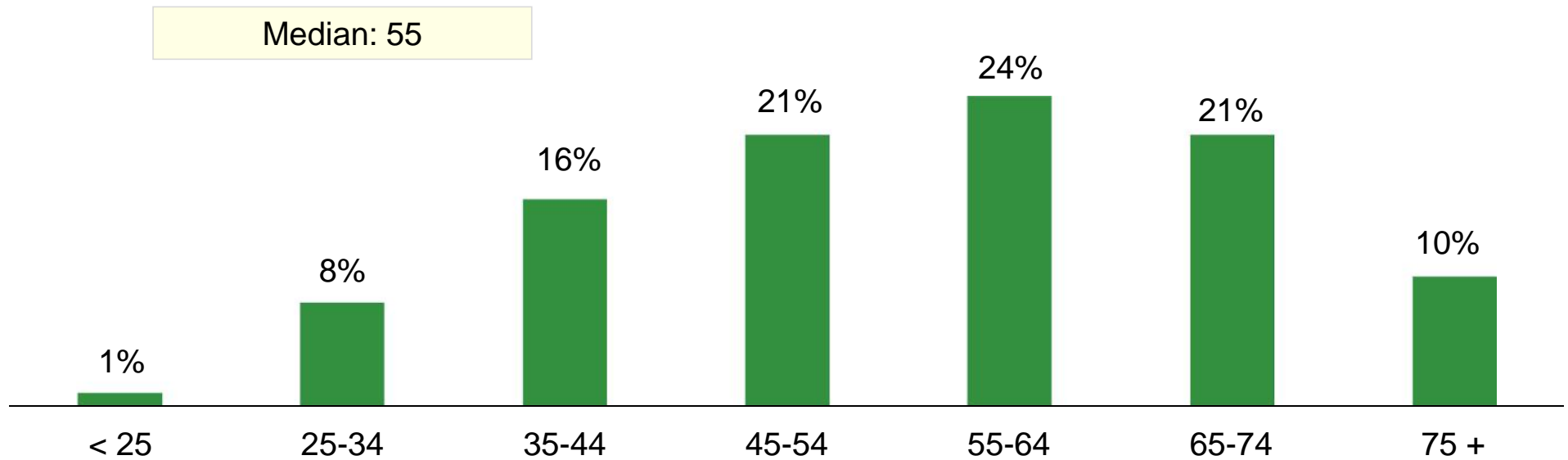
Length of service

Median: 12 years



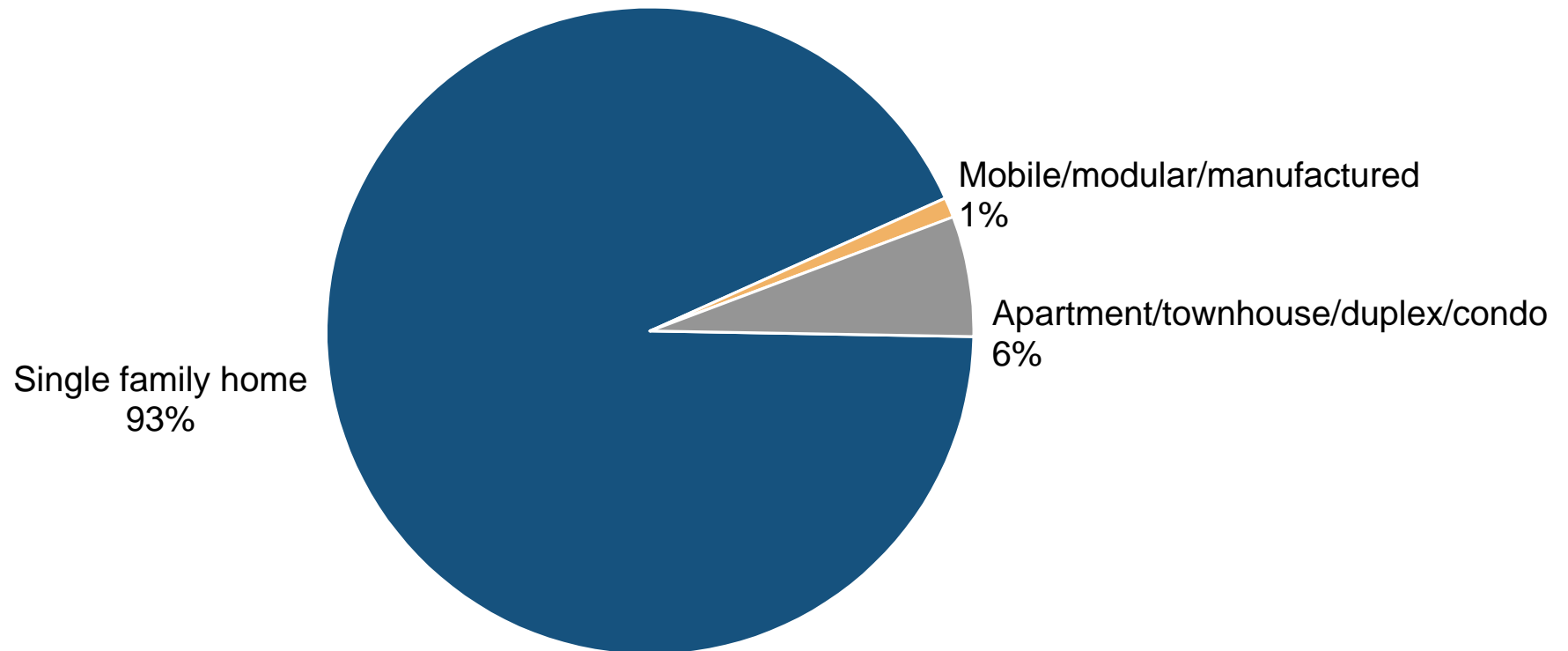
Demographics

Respondent age



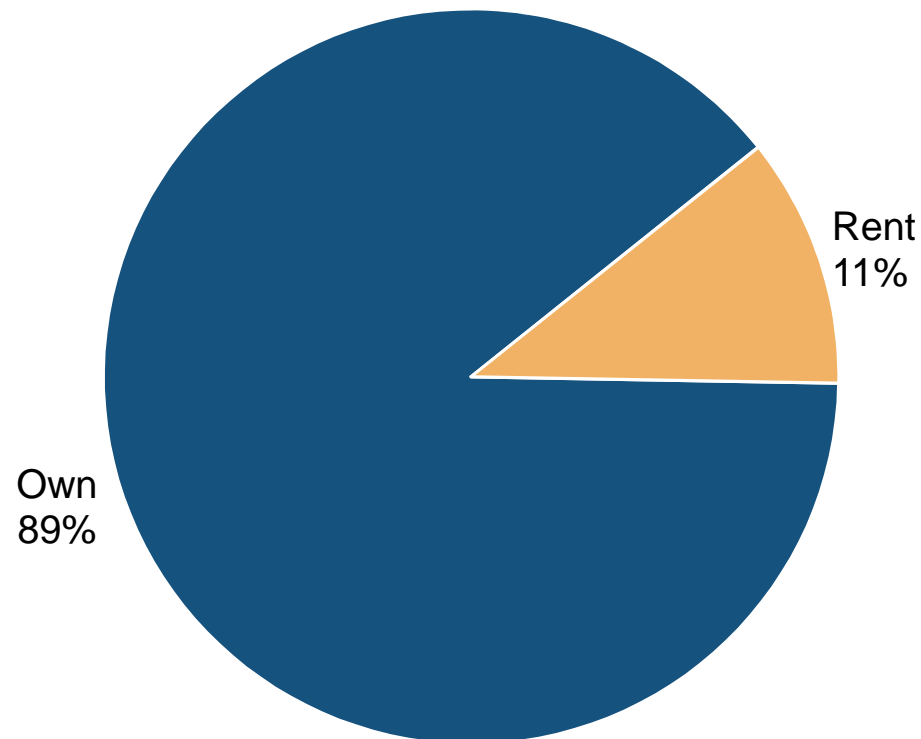
Demographics

Type of residence



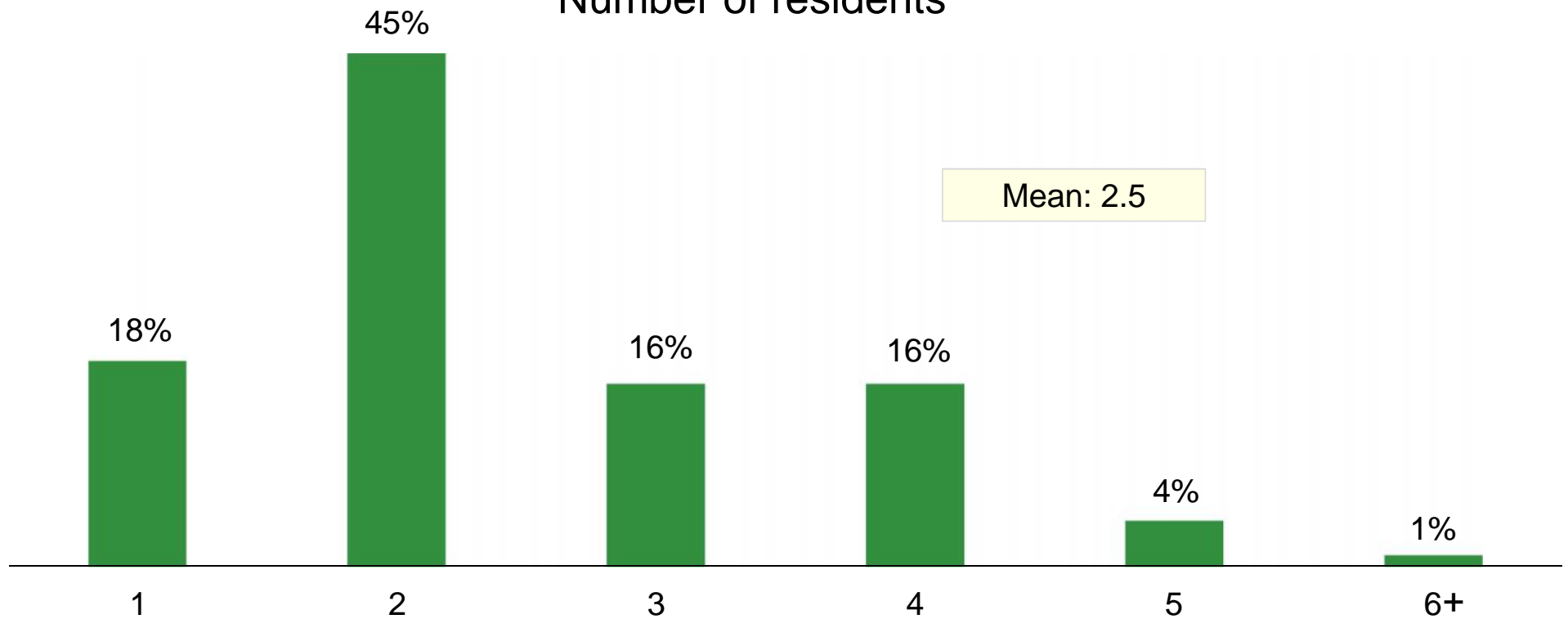
Demographics

Home ownership



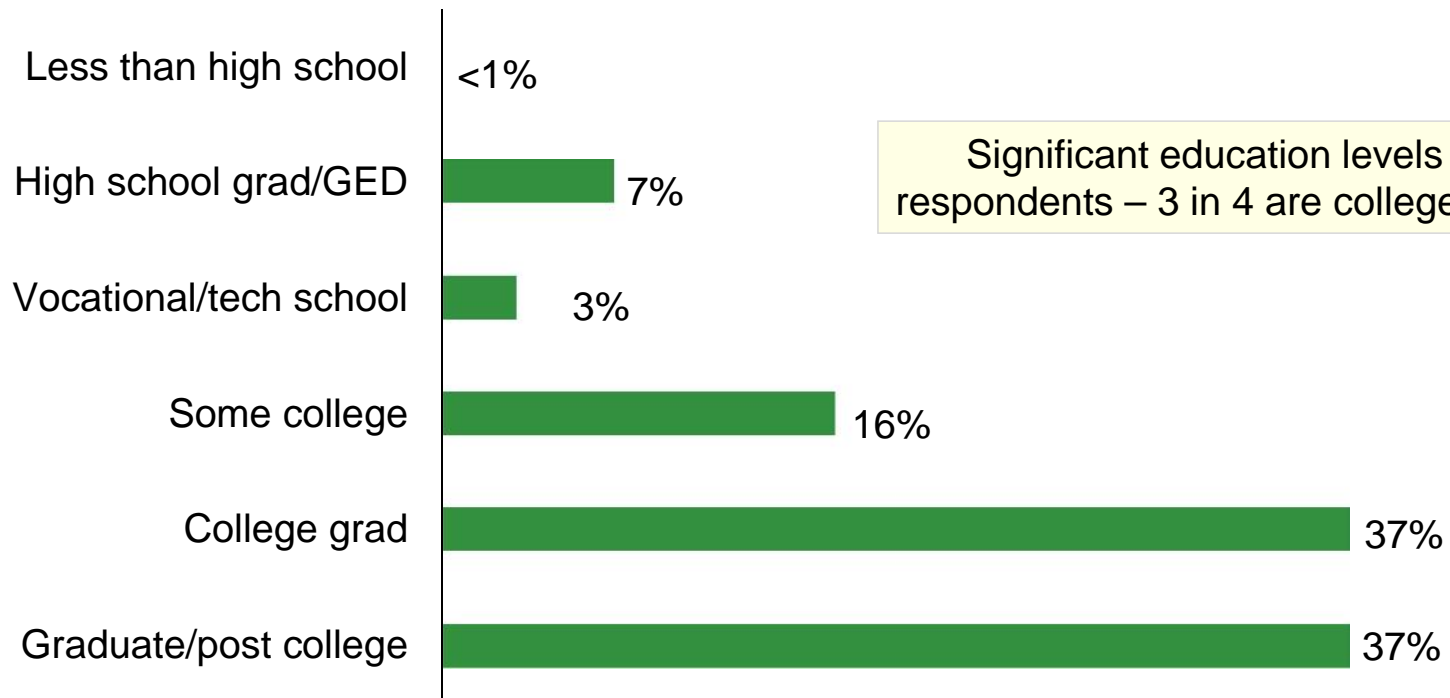
Demographics

Number of residents



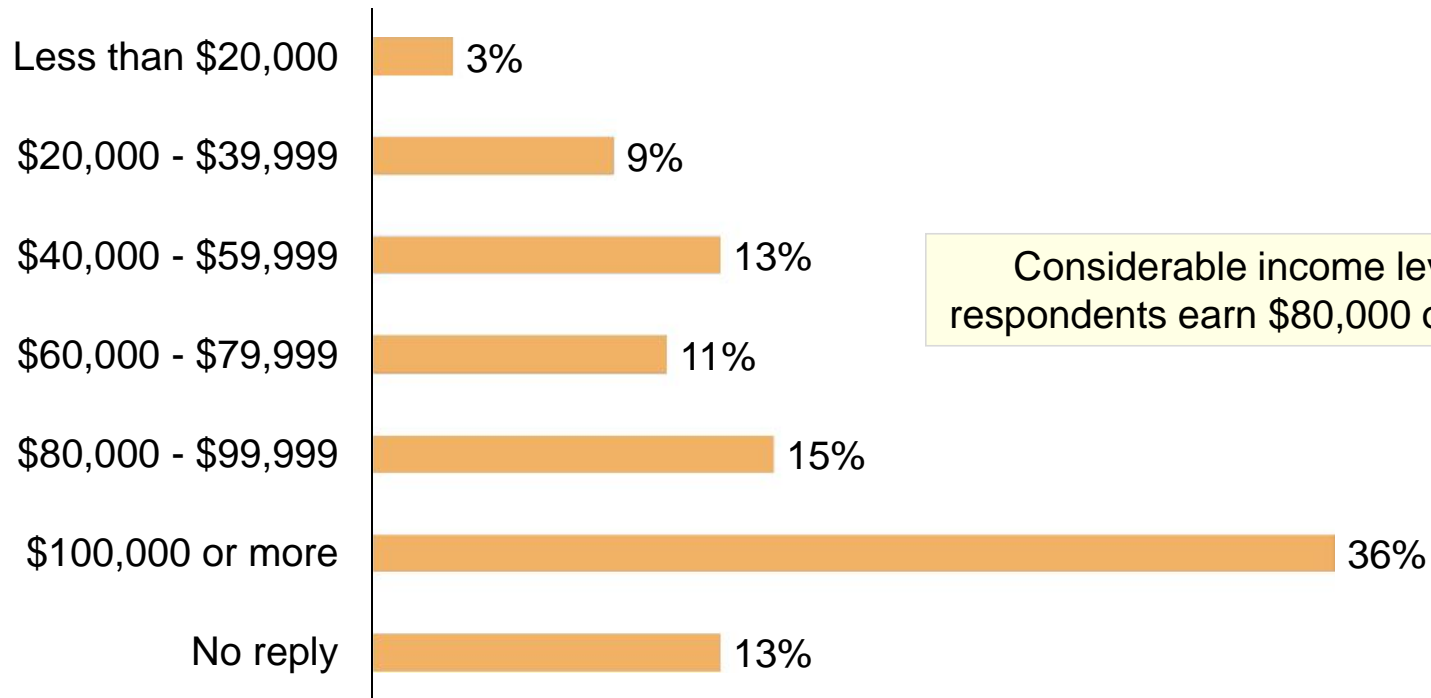
Demographics

Education



Demographics

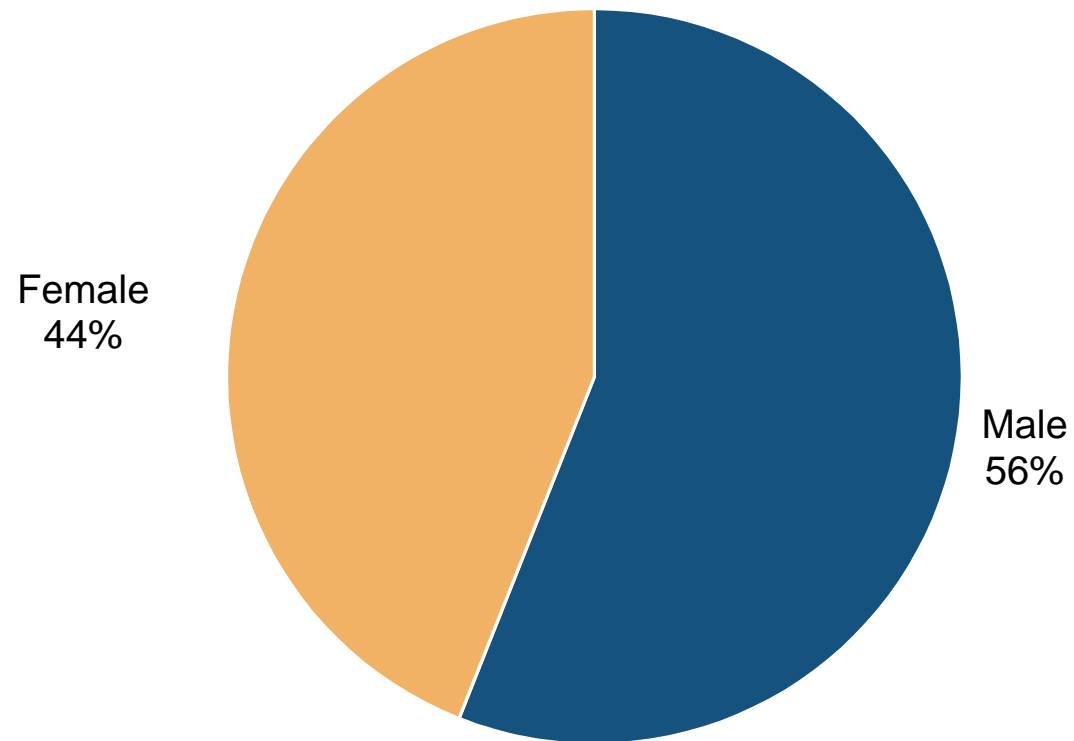
Income



Considerable income levels – half of respondents earn \$80,000 or more per year

Demographics

Gender



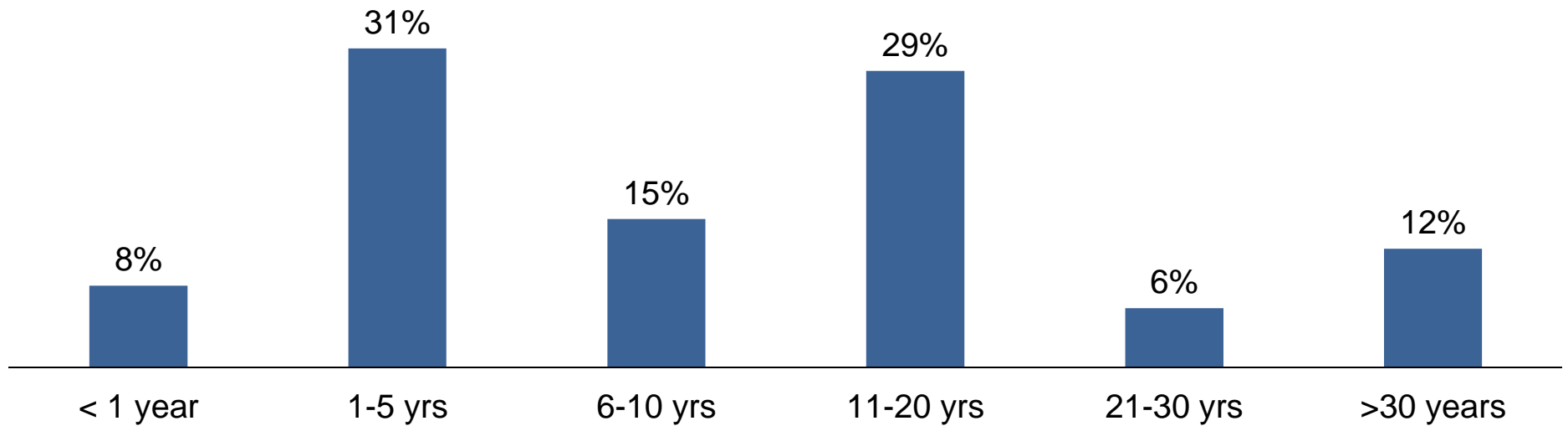


Firmographics

Firmographics

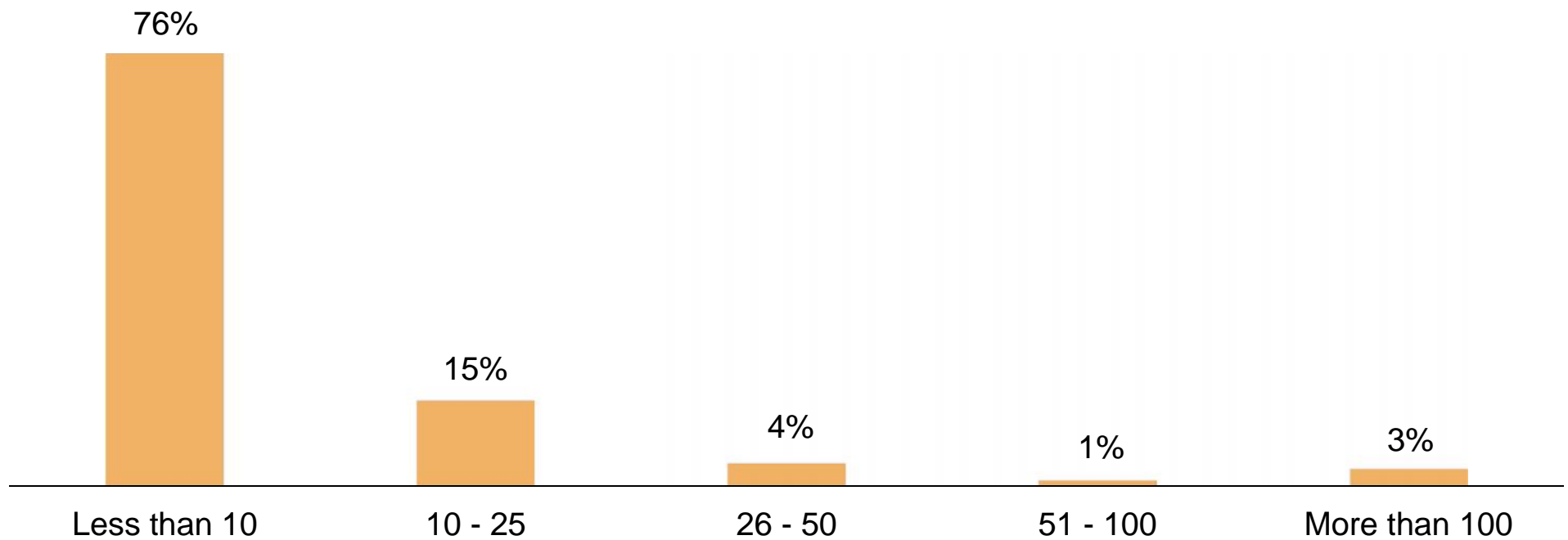
Length of service

Median: 17 years



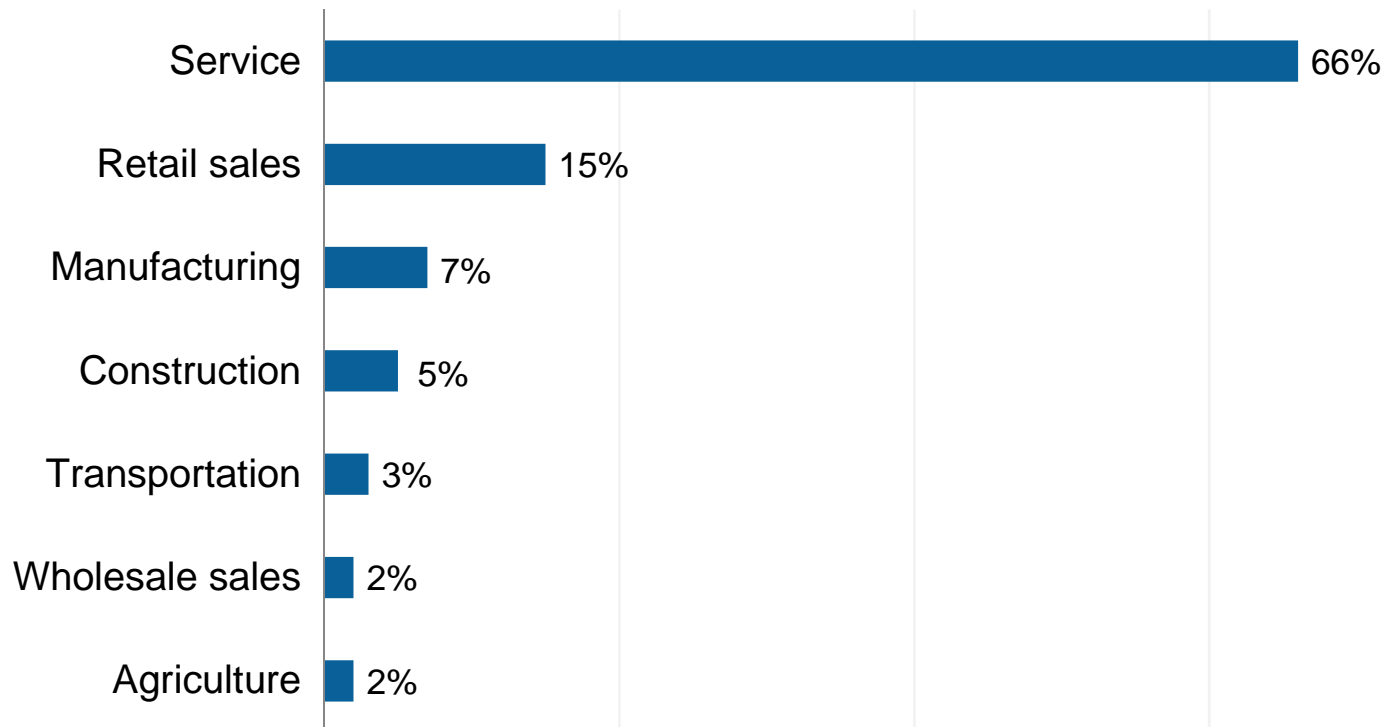
Firmographics

Number of employees



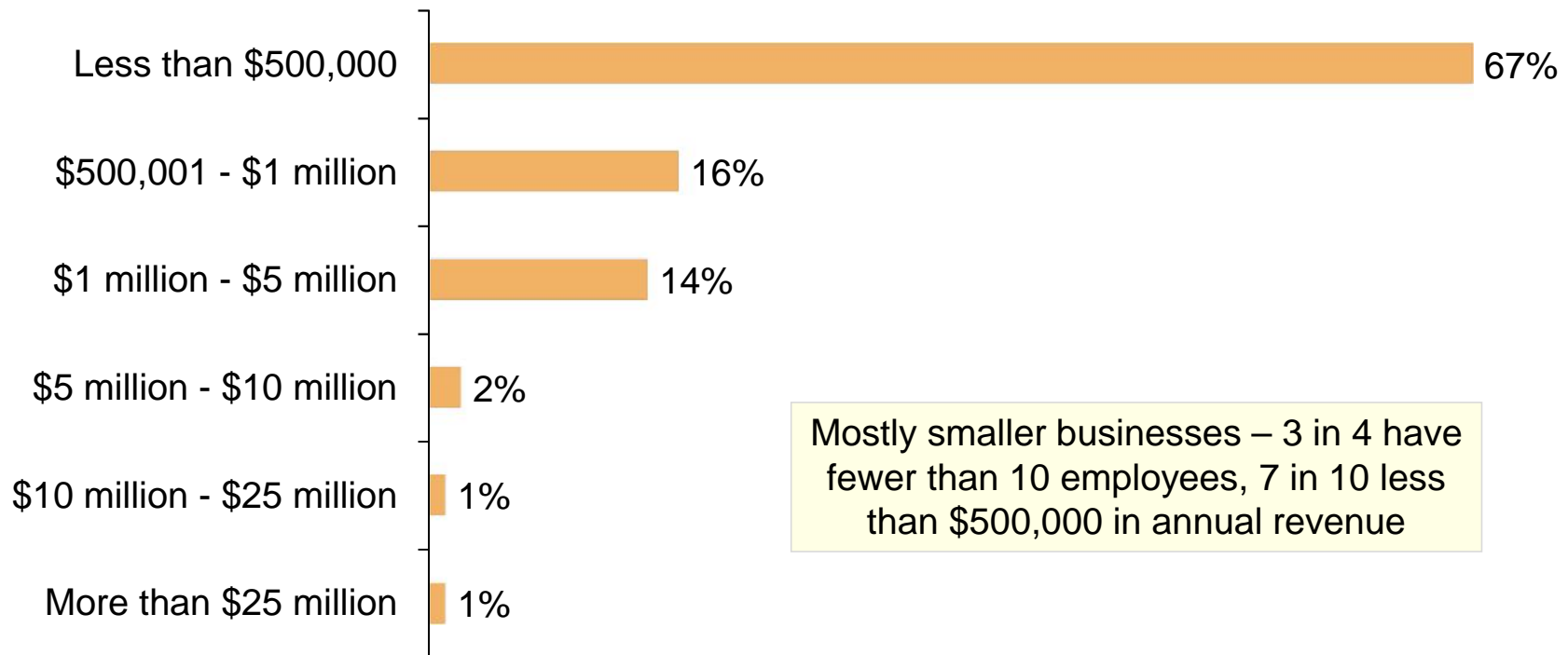
Firmographics

Business type



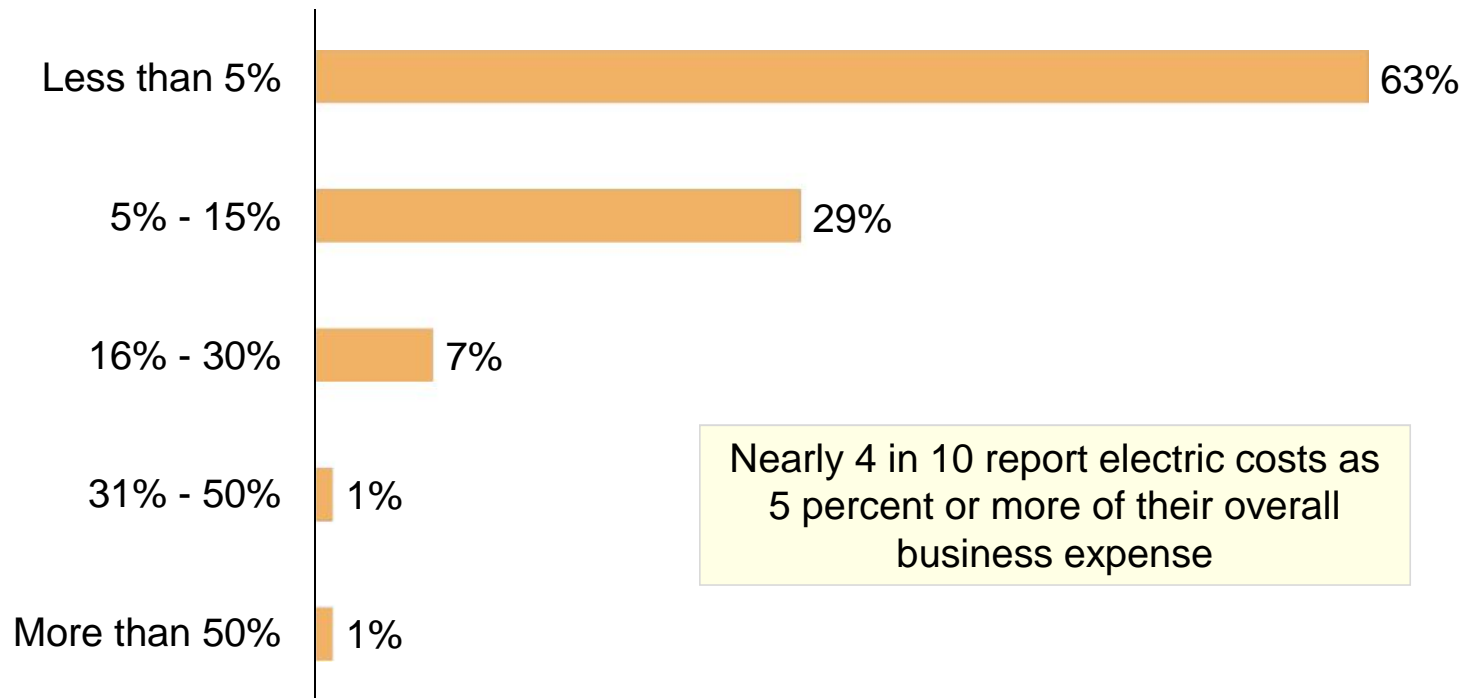
Firmographics

Annual revenue



Firmographics

Electric costs as percentage of overall expense



Customer Notification

Your Opinion Counts!

As the wholesale power provider to Longmont Power & Communications, 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/reslpc18
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 303.651.8386

Survey Questions

- › How long have you received electric service from City of Longmont Power & Communications?
- › Are you aware that Platte River Power Authority provides wholesale electricity generation and transmission services to City of Longmont Power & Communications?
- › 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 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										
Residential: Results based on 263 responses	83.7%	16.3%										
Commercial: Results based on 142 responses	16.9%	83.1%										
1. How long have you received electric service from City of Longmont Power & Communications?												
	Residential	Commercial										
Less than 1 year	5.0%	8.0%										
1 - 5 years	24.2%	31.2%										
6 - 10 years	16.2%	14.5%										
11 - 20 years	27.7%	29.0%										
21 - 30 years	10.8%	5.8%										
More than 30 years	16.2%	11.6%										
Median length of service	12	17										
2. Are you aware that Platte River Power Authority provides wholesale electricity generation and transmission services to City of Longmont Power & Communications?												
	Residential	Commercial										
Yes	59.8%	33.6%										
No	40.2%	66.4%										
3. Based on what you know, what is your opinion of Platte River Power Authority?												
	Not at all favorable -----> Very favorable											
	1	2	3	4	5	6	7	8	9	10	Average	Top Box
Residential	0.5%	0.0%	0.5%	1.8%	27.4%	5.5%	7.8%	16.9%	20.1%	19.6%	7.46	56.6%
Commercial	5.9%	2.0%	1.0%	0.0%	39.6%	2.0%	6.9%	9.9%	5.0%	27.7%	6.72	42.6%
*Top Box = 8 - 10 ratings combined, or highest opinion.												
4. What resources do you think Platte River Power Authority uses to provide your municipality with electricity? (all that apply)												
	Residential	Commercial										
Coal	66.4%	63.6%										
Hydro power	60.3%	33.3%										
Natural gas	68.1%	65.2%										
Solar power	53.0%	34.8%										
Wind power	69.8%	50.0%										

2018 IRP Survey Results

5. Please rate your level of agreement with the following statements regarding Platte River Power Authority.												
*Top Box = 8 - 10 ratings combined, or strongest level of agreement.												
	Strongly disagree -----> Strongly agree											
Residential	1	2	3	4	5	6	7	8	9	10	Average	Top Box
Shows concern for the environment	2.2%	1.3%	2.6%	2.2%	30.0%	9.3%	13.7%	17.2%	8.8%	12.8%	6.67	38.8%
Offers adequate programs to help you use energy efficiently	3.6%	2.2%	1.8%	2.2%	30.0%	11.7%	12.6%	17.5%	9.0%	9.4%	6.45	35.9%
Commercial	1	2	3	4	5	6	7	8	9	10	Average	Top Box
Shows concern for the environment	3.2%	1.1%	2.1%	0.0%	43.6%	3.2%	12.8%	7.4%	8.5%	18.1%	6.55	34.0%
Offers adequate programs to help you use energy efficiently	3.3%	1.1%	3.3%	2.2%	40.7%	4.4%	12.1%	6.6%	11.0%	15.4%	6.44	33.0%
6. How important is it to you that 100% of the energy you receive comes from renewable resources, such as hydro, solar and wind?												
Not at all important -----> Very important												
Residential	1	2	3	4	5	6	7	8	9	10	Average	Top Box
	8.2%	2.0%	2.7%	0.8%	6.7%	3.1%	7.1%	16.5%	12.9%	40.0%	7.73	69.4%
Commercial	1	2	3	4	5	6	7	8	9	10	Average	Top Box
*Top Box = 8 - 10 ratings combined, or highest importance.	8.7%	1.4%	2.2%	3.6%	19.6%	7.2%	8.0%	13.0%	0.7%	35.5%	6.96	49.2%
7. Please rate the importance of the following electric service characteristics:												
Not at all important -----> Very important												
Residential	1	2	3	4	5	6	7	8	9	10	Average	Top Box
Lowest possible cost	2.0%	0.4%	2.4%	3.5%	12.9%	10.2%	8.2%	15.3%	12.2%	32.9%	7.69	60.4%
Reliable service	0.0%	0.0%	0.0%	0.0%	3.1%	2.4%	3.1%	13.8%	16.9%	60.6%	9.21	91.3%
Renewable resource	5.9%	1.2%	3.9%	0.8%	6.3%	2.4%	6.3%	19.3%	13.8%	40.2%	7.93	73.3%
Commercial	1	2	3	4	5	6	7	8	9	10	Average	Top Box
Lowest possible cost	1.4%	0.7%	0.7%	3.6%	18.6%	5.0%	7.1%	13.6%	9.3%	40.0%	7.84	62.9%
Reliable service	0.0%	0.0%	0.0%	0.0%	0.7%	0.7%	2.9%	7.9%	13.7%	74.1%	9.55	95.7%
Renewable resource	5.2%	2.2%	0.7%	2.2%	16.3%	5.2%	14.8%	12.6%	5.9%	34.8%	7.39	53.3%

2018 IRP Survey Results

8. 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	28.5%			Not willing to pay more	35.8%						
\$5 to \$10 per month	35.5%			1% to 5% per month	24.8%						
\$11 to \$20 per month	20.7%			6% to 10% per month	21.2%						
\$21 to \$30 per month	9.4%			11% to 20% per month	4.4%						
More than \$30 per month	5.9%			More than 20% per month	4.4%						
				Unsure/unknown	9.5%						
Demographics											
D1. How old are you?											
Under 25	0.8%			45 - 54	20.8%		75+	9.8%			
25 - 34	8.2%			55 - 64	23.9%						
35 - 44	15.7%			65 - 74	20.8%						
Median age: 55											
D2. What type of residence do you live in?											
Single-family home	93.4%										
Mobile, modular or manufactured home	0.8%										
Apartment, townhouse, duplex or condominium	5.9%										
D3. Do you own or rent your home?											
Own	88.6%			Rent	11.4%						
D4. How many people live in your household?											
1		2	3	4	5	6+					
18.1%	44.5%	16.1%	16.1%	3.9%	1.2%		Average:	2.5			

2018 IRP Survey Results

D5. What is the highest level of education you have completed?											
Less than high school	0.4%				Some college	15.8%					
High school graduate/GED	7.1%				College graduate	36.8%					
Vocational-technical school	2.8%				Graduate or post-college school	37.2%					
D6. What is your household income?											
Less than \$20,000	2.7%				\$80,000 to \$99,999	14.8%					
\$20,000 to \$39,999	9.1%				\$100,000 or more	36.1%					
\$40,000 to \$59,999	12.9%				No response	13.3%					
\$60,000 to \$79,999	11.0%										
Median income: \$99,323											
D7. Respondent's gender											
Male	56.3%				Female	43.7%					

2018 IRP Survey Results

Firmographics											
F1. How many employees does your business have?											
Less than 10	76.1%										
10 to 25	15.2%										
26 to 50	4.3%										
51 to 100	1.4%										
More than 100	2.9%										
F2. What type of business do you have?											
Service	66.4%					Agriculture	1.5%				
Retail sales	14.6%					Mining or refining	0.0%				
Wholesale sales	2.2%					Transportation	2.9%				
Manufacturing	7.3%					Public administration	0.0%				
Construction	5.1%					Other	0.0%				
F3. What is the annual revenue of your business?											
Less than \$500,000	67.2%										
\$500,001 to \$1 million	16.0%										
\$1 million to \$5 million	13.6%										
\$5 million to \$10 million	1.6%										
\$10 million to \$25 million	0.8%										
More than \$25 million	0.8%										
F4. What is the percentage of electricity costs to your overall business costs?											
Less than 5%	62.5%										
5% to 15%	28.9%										
16% to 30%	7.0%										
31% to 50%	0.8%										
More than 50%	0.8%										