



Platte River
Power Authority

Estes Park • Fort Collins • Longmont • Loveland

2020 Integrated Resource Plan survey results

Conducted by:



(a solutions company)



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2020 Integrated Resource Plan survey



Scope and methodology

During the spring of 2020, Platte River Power Authority, in coordination with Loveland Water and Power, conducted an Integrated Resource Plan survey to measure residential and commercial end-user favorability toward Platte River, opinions about the importance of receiving noncarbon energy, economic elasticity of renewables, and to collect basic residential demographic and commercial firmographic data.

Survey responses were received from 258 randomly selected residential customers and 238 commercial customers. The results of the residential survey have a margin of error of $\pm 6.1\%$ at a 95% degree of probability. The results of the commercial survey have a margin of error of $\pm 5.7\%$. For any given statistic, there is a 95% chance that the result does not vary by more than 6.1% for the actual total population of residential customers and 5.7% for the actual total population of commercial customers.

Of the 258 residential survey completions, 155 (60%) were completed online by customers responding to either a postcard mailing or email notice. Following the online completions, 103 (40%) surveys were completed by callers conducting phone interviews. Of the 238 commercial survey completions, 86 (36%) were completed online and 152 (64%) were completed via phone interview.

The survey was conducted as part of a research project coordinated by Platte River Power Authority. Four communities 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.

The 2020 survey results are compared with the previous surveys conducted in 2018 to identify trends that can be used to improve services and customer opinions. 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%.

This survey was developed and conducted by Inside Information, Inc.[®], Smithville, Mo., as a research project commissioned by Platte River Power Authority, Fort Collins, Colo.

Executive summary



Platte River Power Authority

- 61% of residential customers and 53% of commercial customers are aware Platte River Power Authority provides electricity generation and transmission services to their utility
- The level of awareness among both customer groups increased – up 10% for residential and up 4% for commercial
- Fewer customers rate Platte River somewhat or very favorably, decreasing from 56% to 54% for residential customers and decreasing from 55% to 48% for commercial customers
- Platte River's ratings for showing concern for the environment and offering the Efficiency Works program were relatively similar among both groups, ranging from 7.1 to 7.3
- Same as in 2018, 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 the Efficiency Works program
- On a 10-point scale, high percentages of residential and commercial customers rated Platte River a 5 for showing concern for the environment and offering the Efficiency Works program – most likely due to their lack of awareness of Platte River and its services
- Compared to all generating forms used by Platte River, residential customers are least aware of Platte River's wind power, and commercial customers are least aware of its hydropower



Renewable resource options

- Service reliability is seen as the most important service characteristic by all customers – 92% of residential and 97% of commercial customers view it as somewhat or very important
- Only 41% of commercial customers view noncarbon resources as somewhat or very important, compared to 56% of residential customers
- When considering how much more they would be willing to pay to receive noncarbon energy, customers said most often about 2.2% more each year to receive 60% noncarbon energy by 2030 with 99.99% reliability (36% of residential and 46% of commercial customers)



Demographics

- Median age is 62
- Median length of service for residential customers is 10 years
- 88% of residential respondents have post-high school education
- 20% earn \$100,000 or more per year – median household income is \$61,332



Firmographics

- Median length of service for commercial customers is 10 years
- 65% of businesses have fewer than 10 employees
- The common business types responding are service (37%) and other (23%)
- 71% of businesses have an annual revenue of \$1 million or less
- Most businesses (52%) report electric costs as less than 5% of their overall business expenses



Platte River
Power Authority

Estes Park • Fort Collins • Longmont • Loveland

Integrated Resource Plan survey results

2020

Overview

Integrated Resource Plan survey 2020



Estes Park • Fort Collins • Longmont • Loveland



During the spring of 2020, Platte River Power Authority, in coordination with Loveland Water and Power, conducted an Integrated Resource Plan survey to measure residential and commercial end-user favorability toward Platte River, opinions about the importance of receiving noncarbon energy, economic elasticity of renewables, and to collect basic residential demographic and commercial firmographic data.

These results include online and phone survey replies from 258 residential end-users and 238 commercial customers.

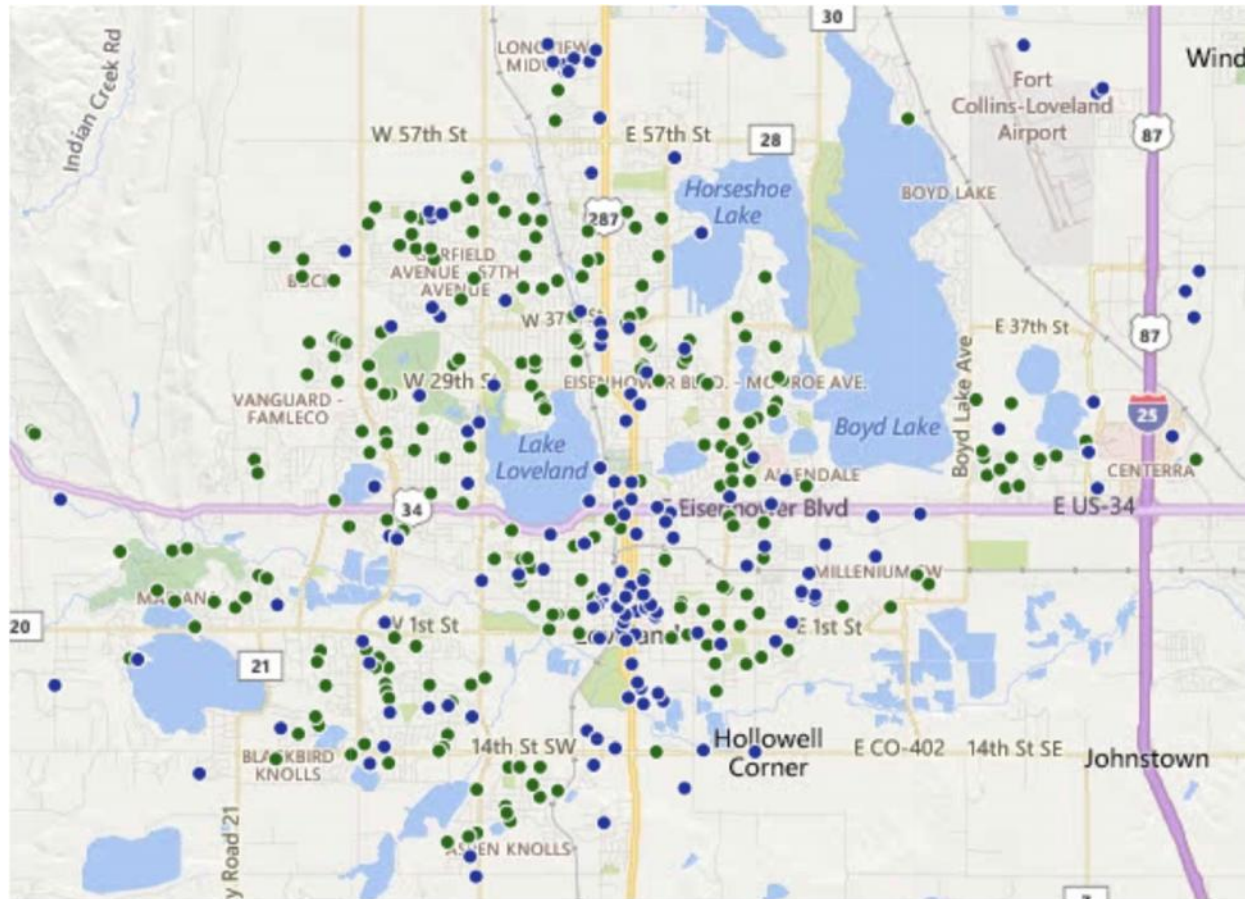
Highlights

- 61% of residential customers and 53% of commercial customers are aware Platte River Power Authority provides electricity generation and transmission services to their utility
- The level of awareness among both customer groups increased – up 10% for residential and up 4% for commercial
- Fewer customers rate Platte River somewhat or very favorably, decreasing from 56% to 54% for residential customers and decreasing from 55% to 48% for commercial customers
- Platte River's ratings for showing concern for the environment and offering the Efficiency Works program were relatively similar among both groups, ranging from 7.1 to 7.3
- 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 the Efficiency Works program
- On a 10-point scale, high percentages of residential and commercial customers rated Platte River a 5 for showing concern for the environment and offering the Efficiency Works program – most likely due their lack of awareness of Platte River and its services

Highlights

- Compared to all generating forms used by Platte River, residential customers are least aware of Platte River's wind power, and commercial customers are least aware of its hydropower
- Service reliability is seen as the most important service characteristic by all customers – 92% of residential and 97% of commercial customers view it as somewhat or very important
- Only 41% of commercial customers view noncarbon resources as somewhat or very important, compared to 56% of residential customers
- When considering how much more they would be willing to pay to receive noncarbon energy, most customers said about 2.2% more each year to receive 60% noncarbon energy by 2030 with 99.99% reliability (36% of residential 46% of commercial customers)
- Loveland's residential customers have a median age of 62, median length of service of 10 years, and median household income of \$61,332
- Loveland's commercial customers are primarily small businesses with 71% having an annual revenue of \$1 million or less and 65% having fewer than 10 employees

Respondents

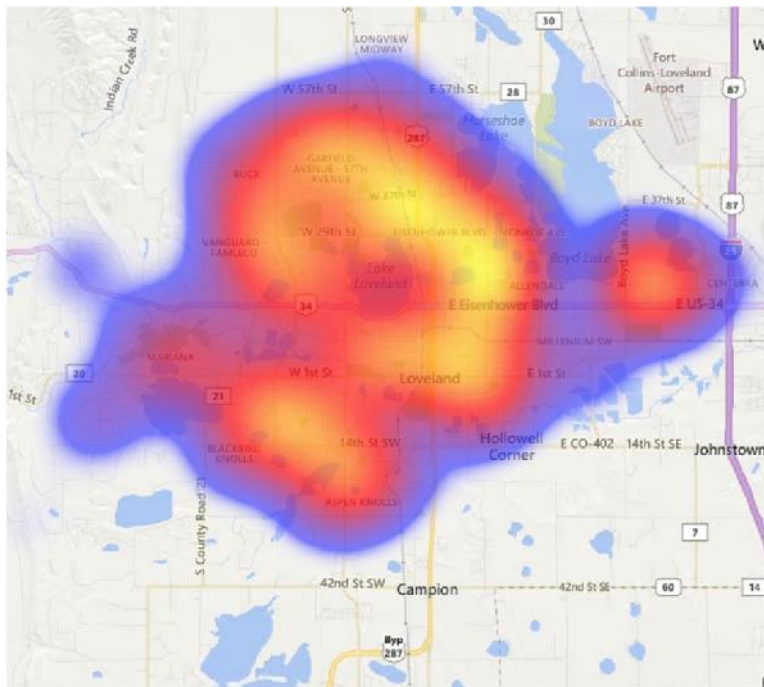


- Residential
- Commercial

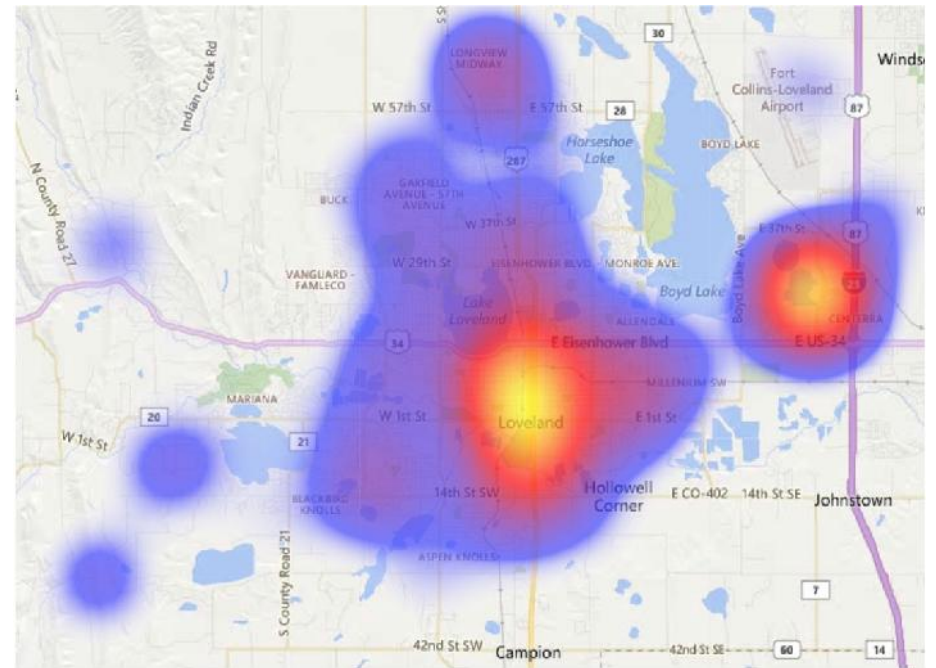
Respondents

Response density

Residential



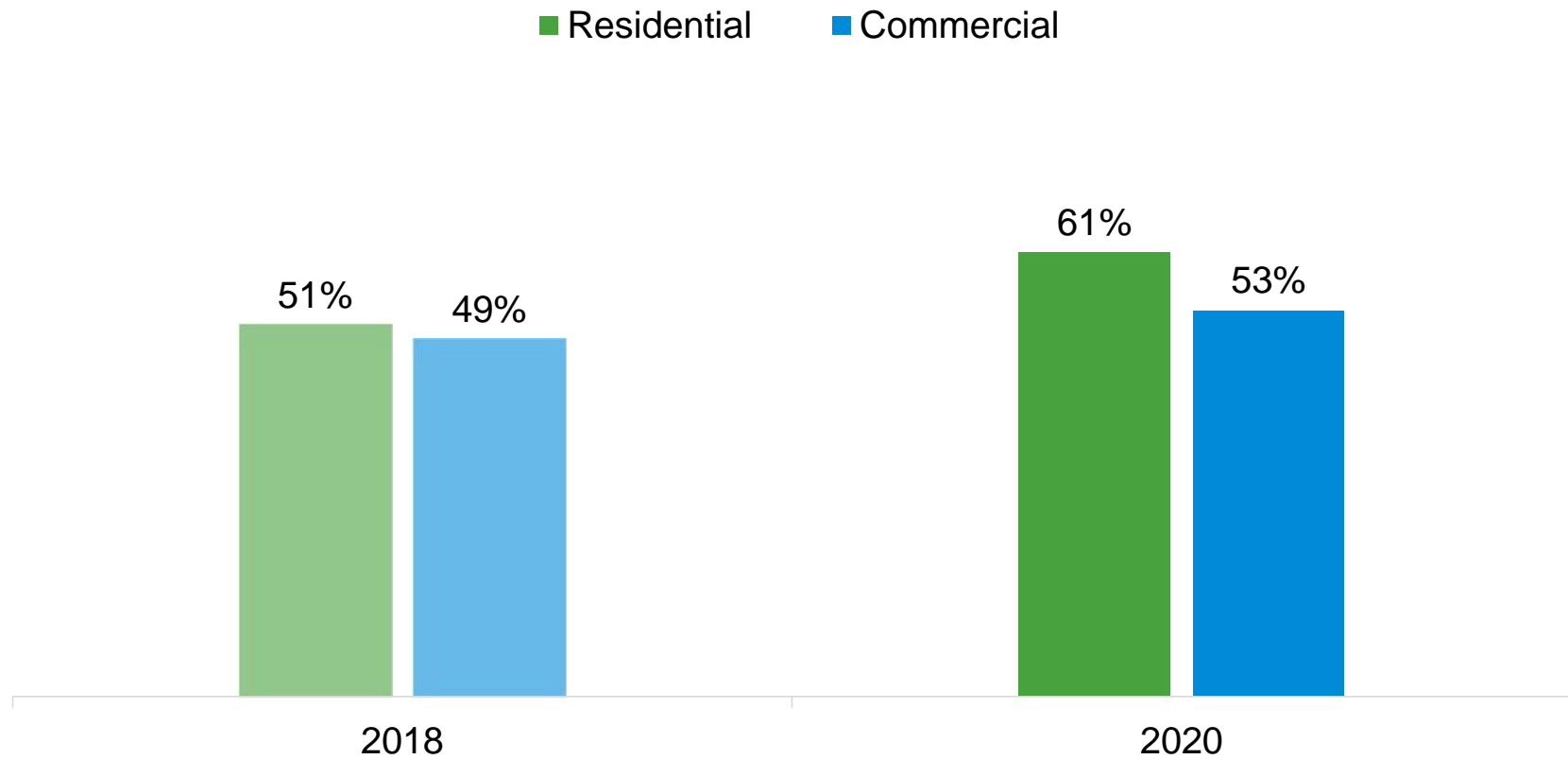
Commercial





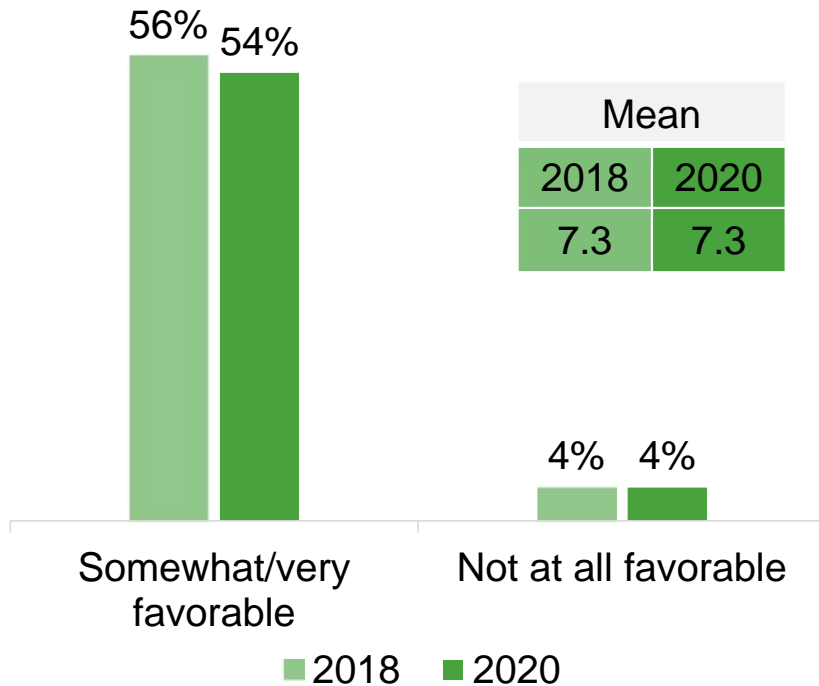
Awareness and opinions

Aware Platte River provides generation

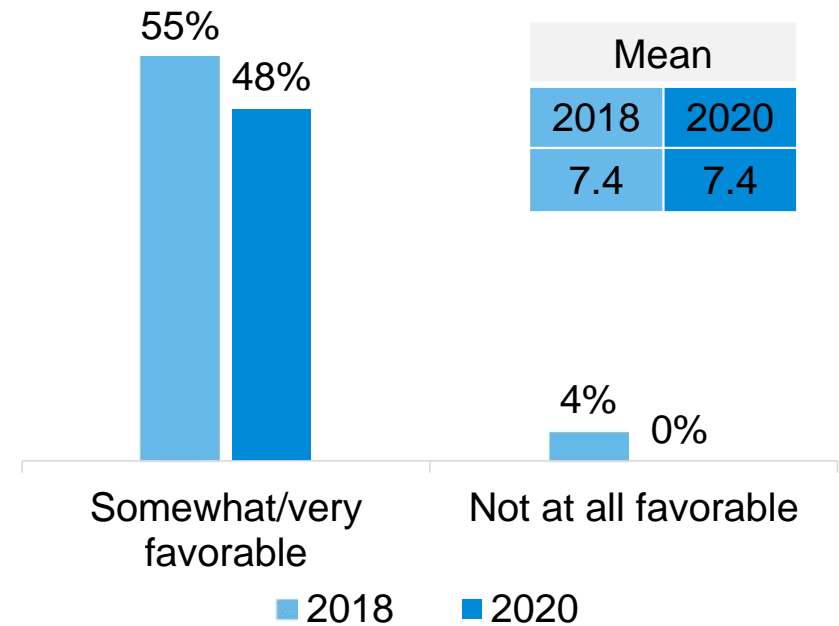


Opinion of Platte River

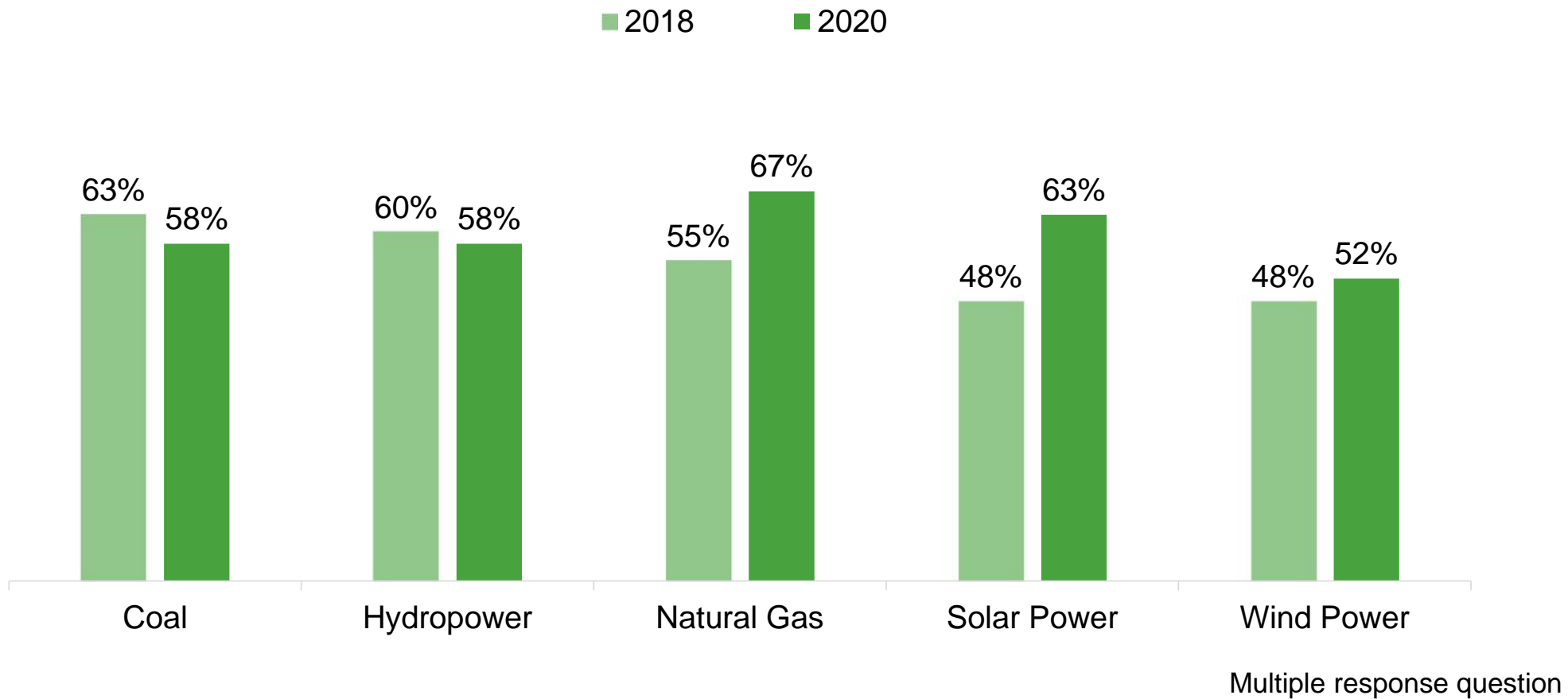
Residential



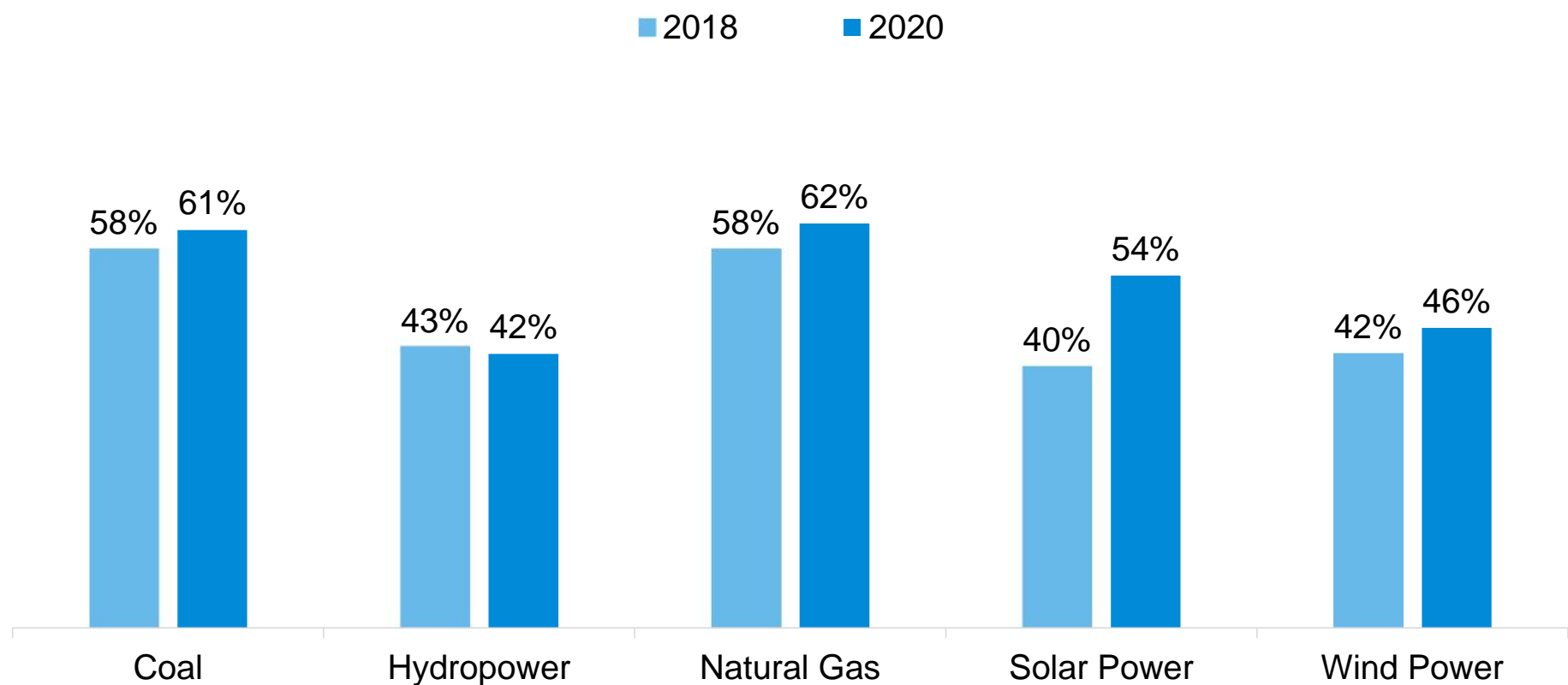
Commercial



Perceived generation source - residential



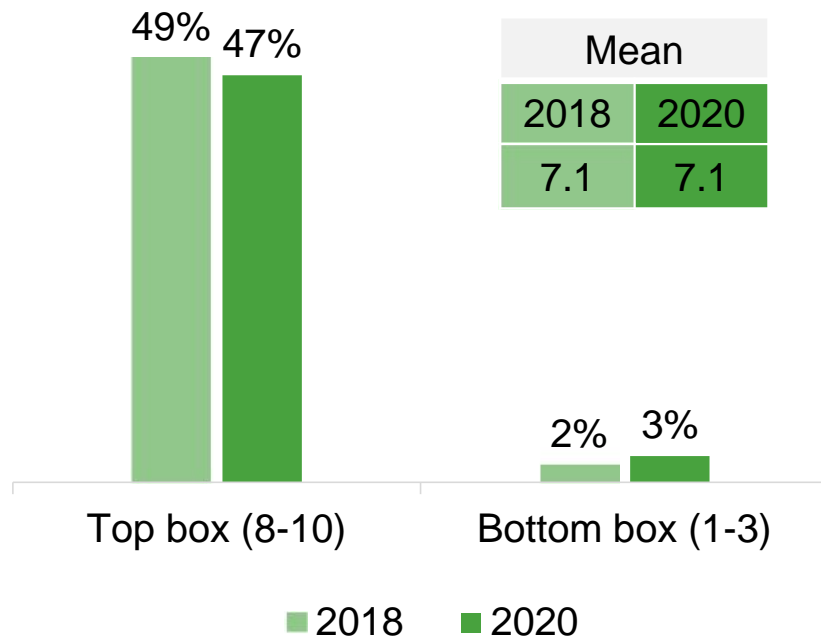
Perceived generation source - commercial



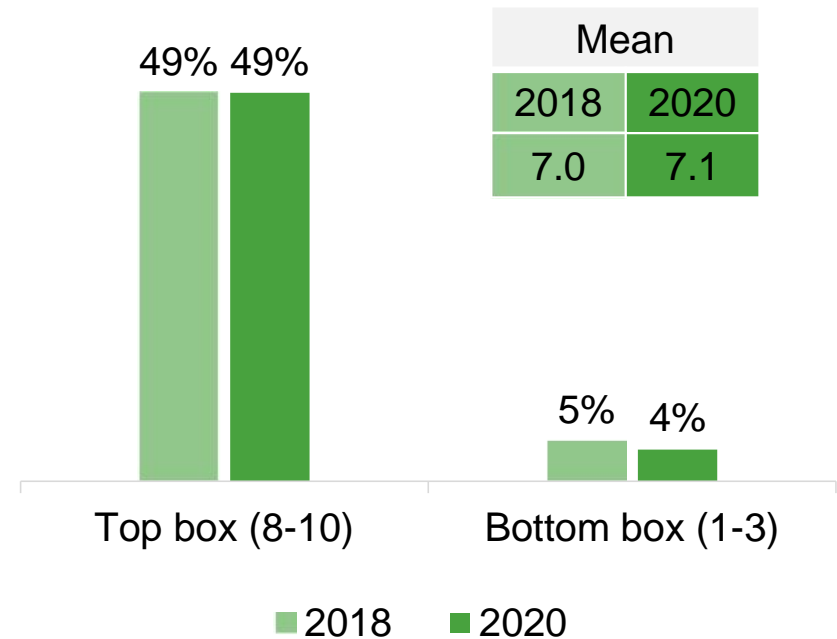
Multiple response question

Energy efficiency ratings - residential

Shows concern for the environment

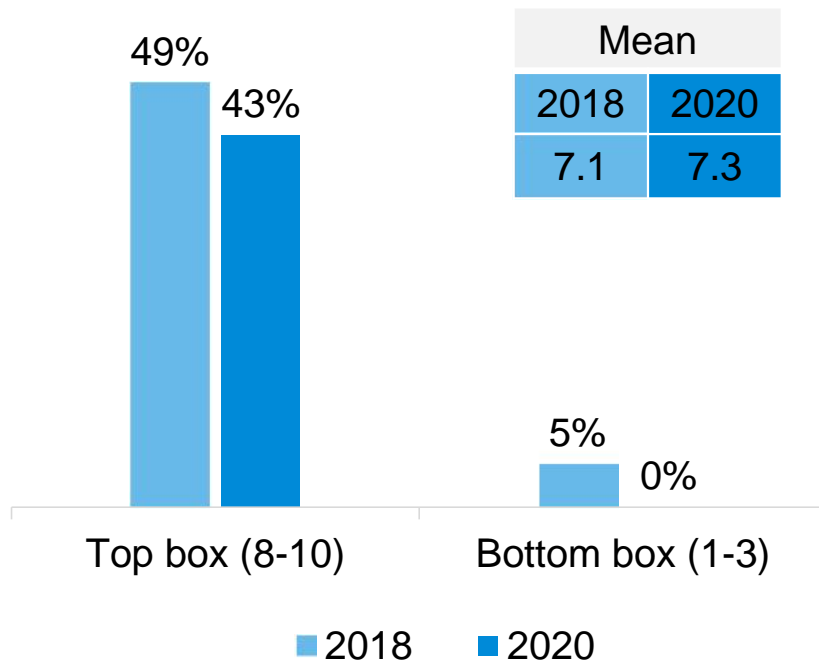


Offers Efficiency Works program

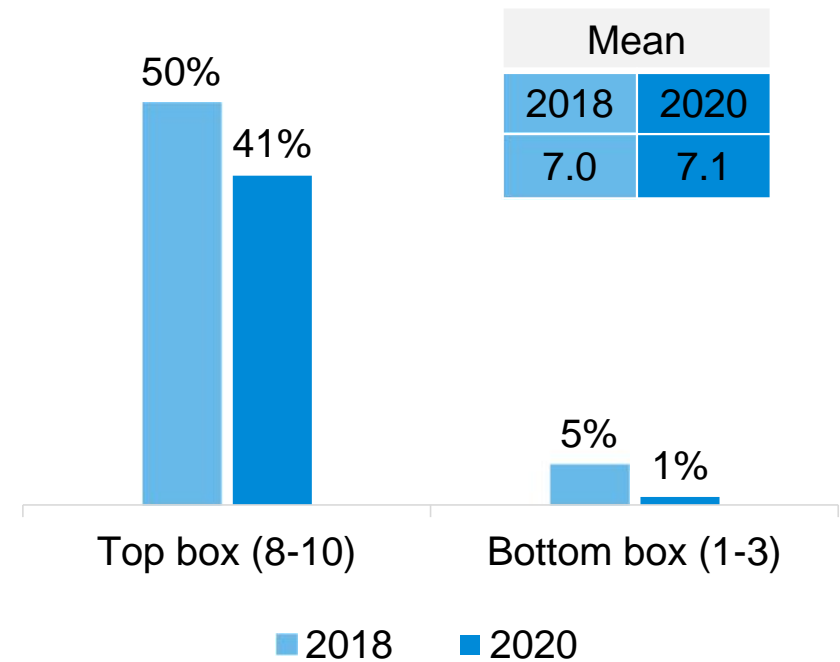


Energy efficiency ratings - commercial

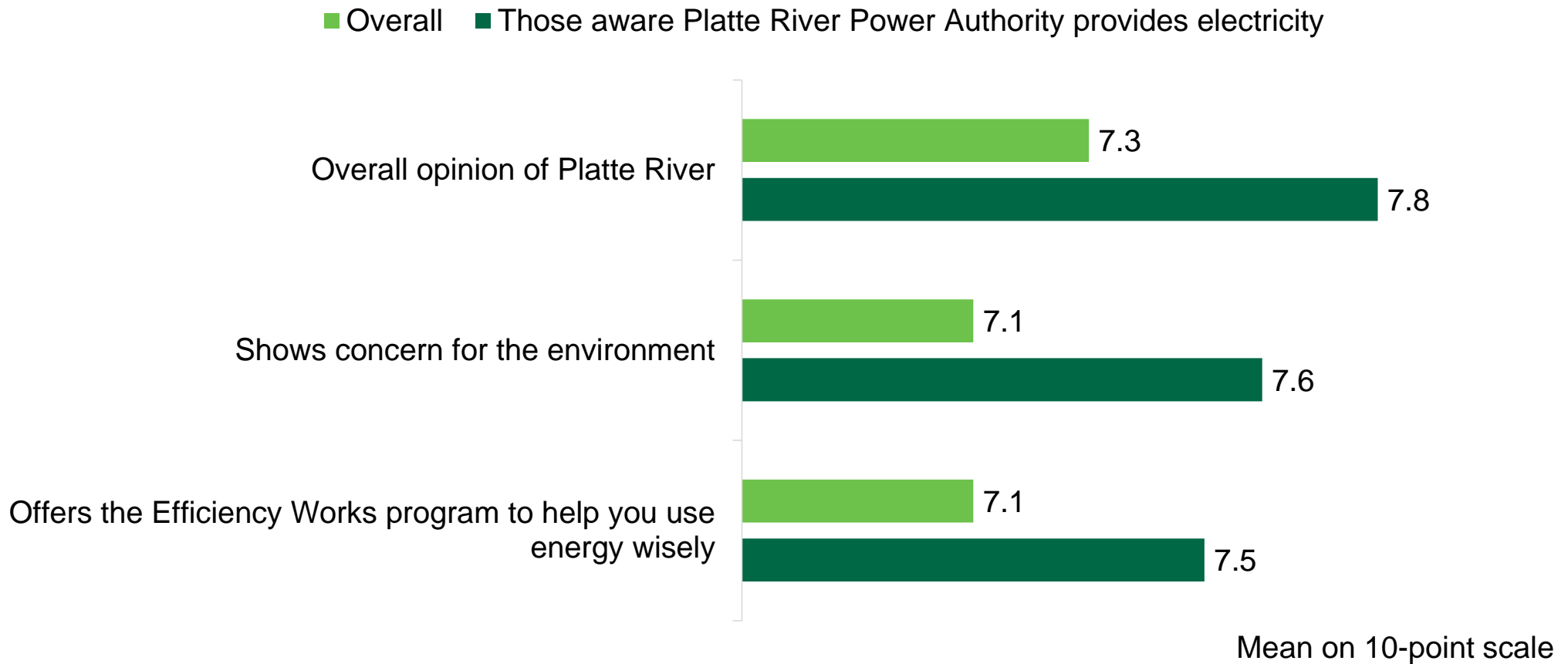
Shows concern for the environment



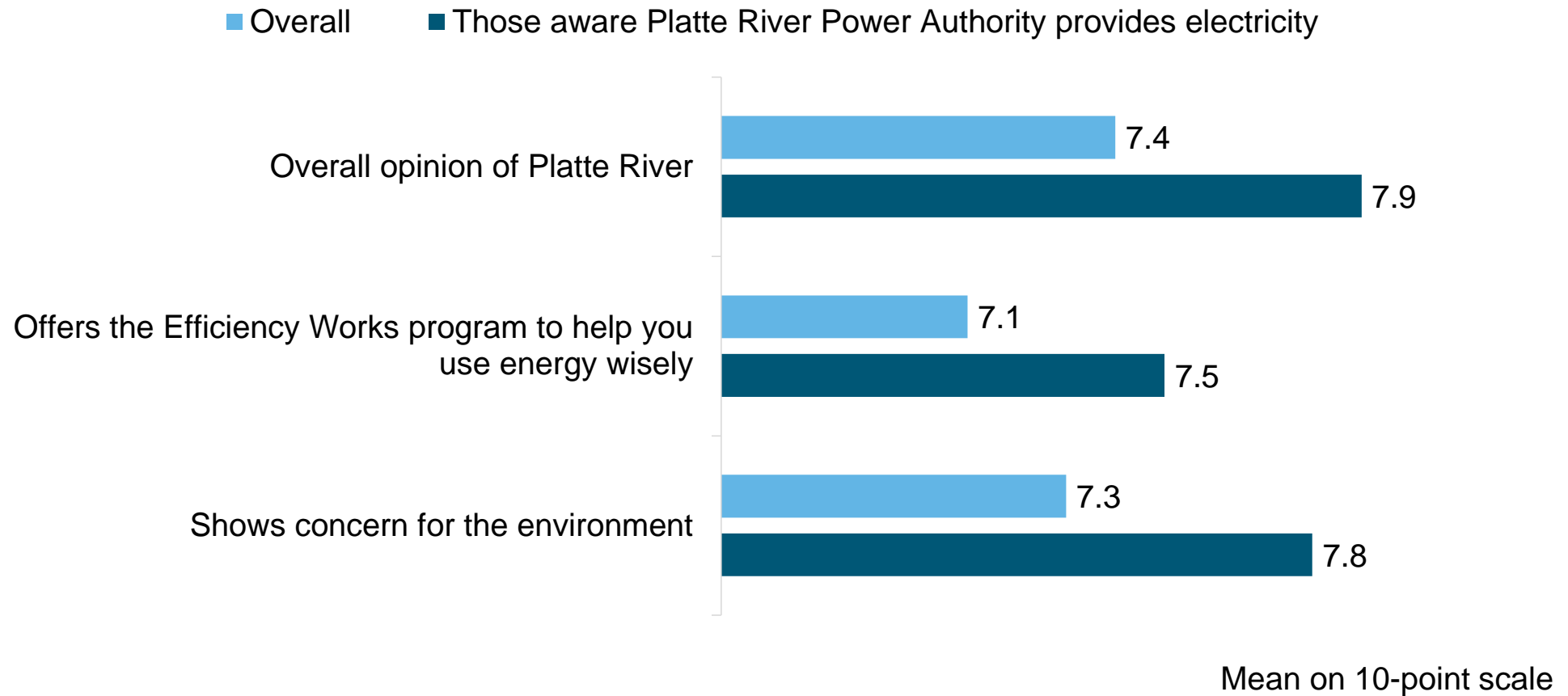
Offers Efficiency Works program

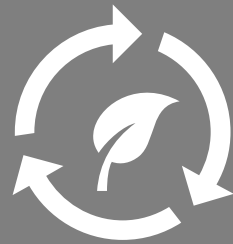


Opinion comparison - residential



Opinion comparison - commercial

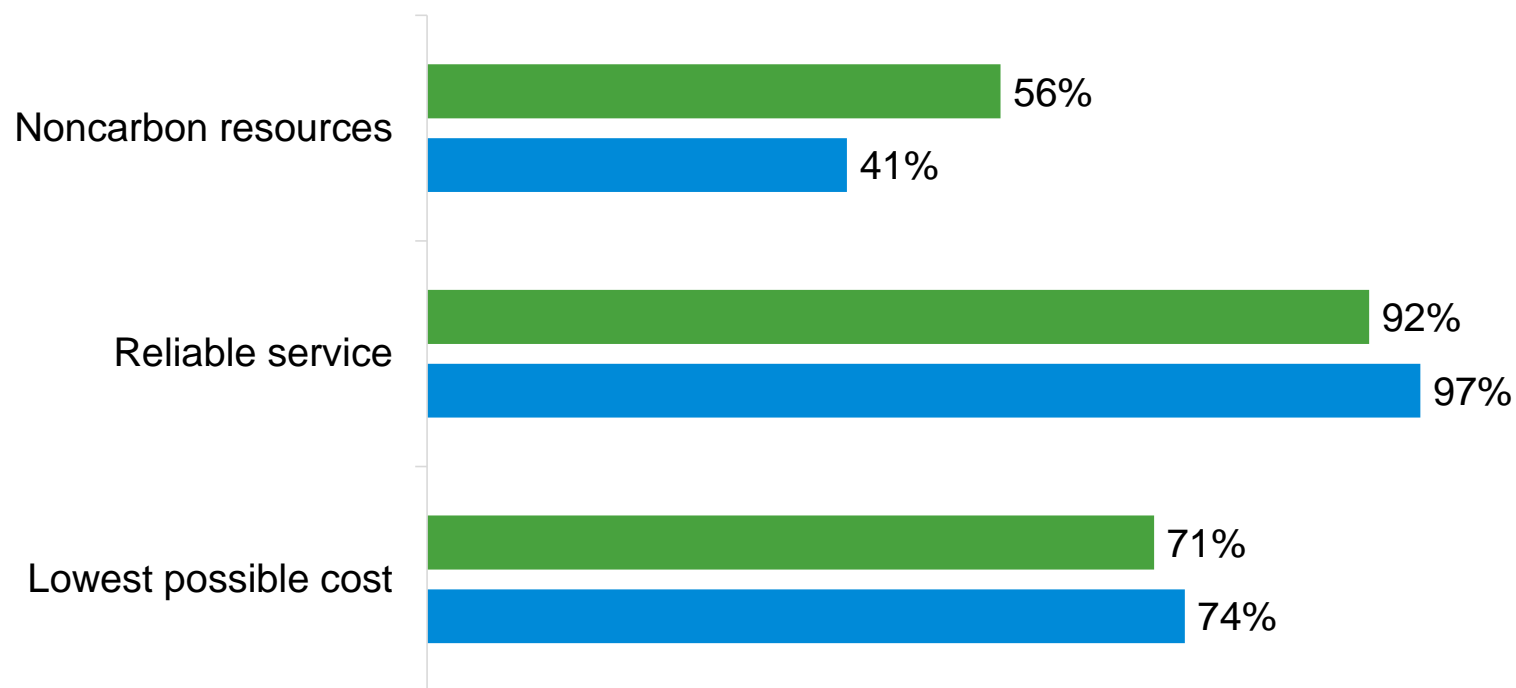




Renewable resource opinions

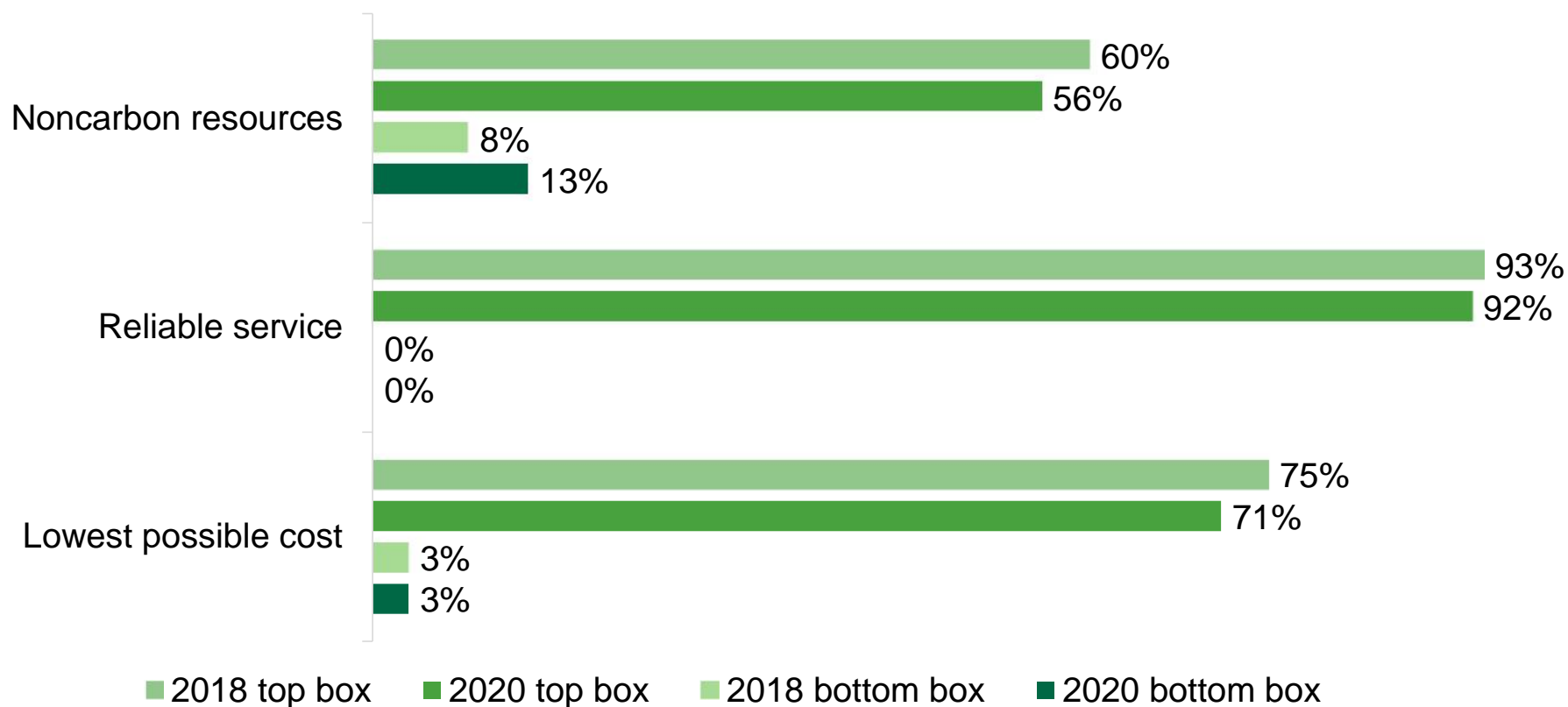
Service characteristics importance

■ Residential ■ Commercial

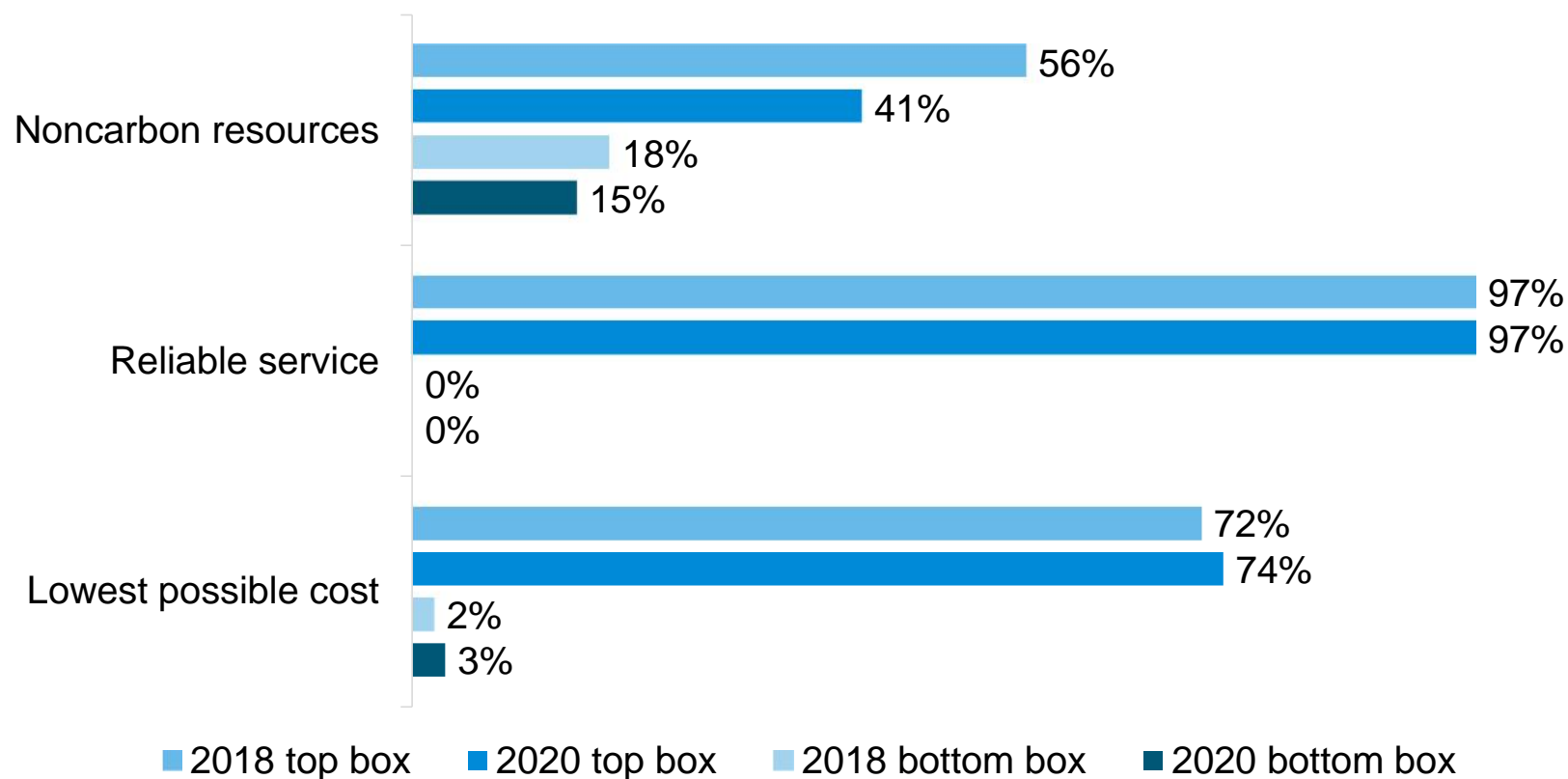


Somewhat or very important (8-10 ratings)

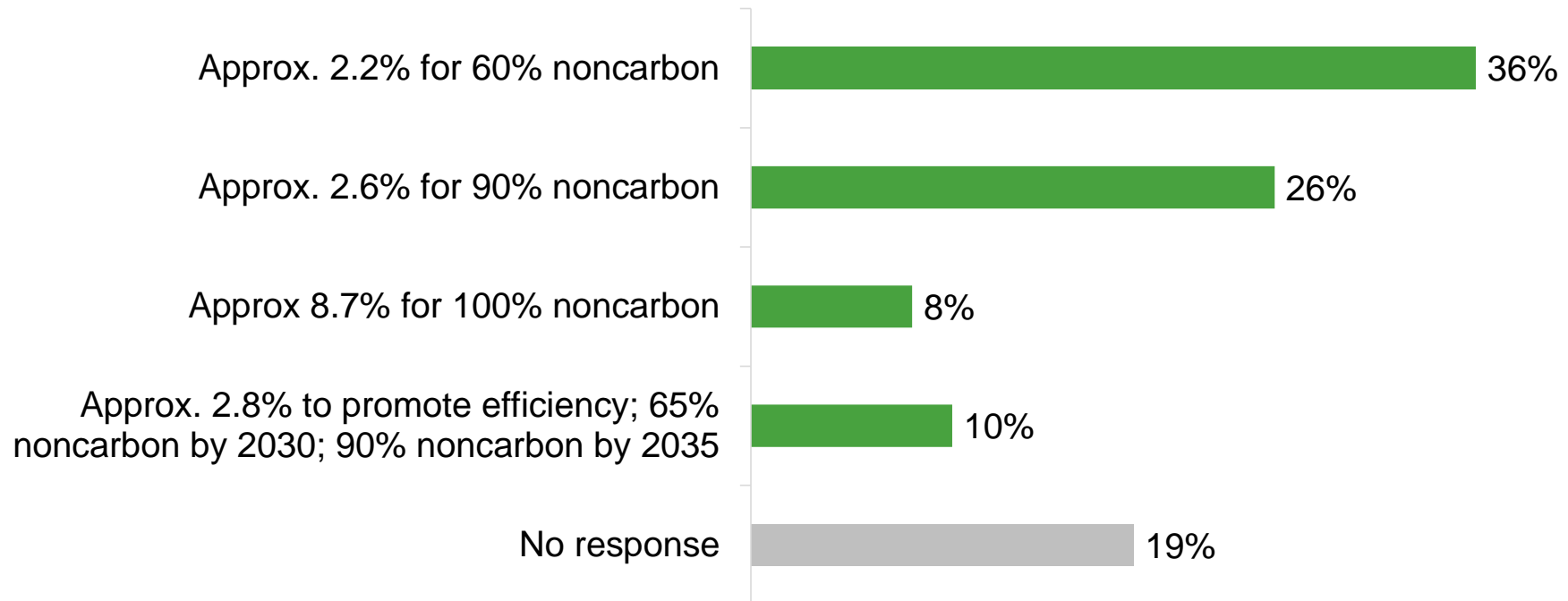
Service characteristics importance - residential



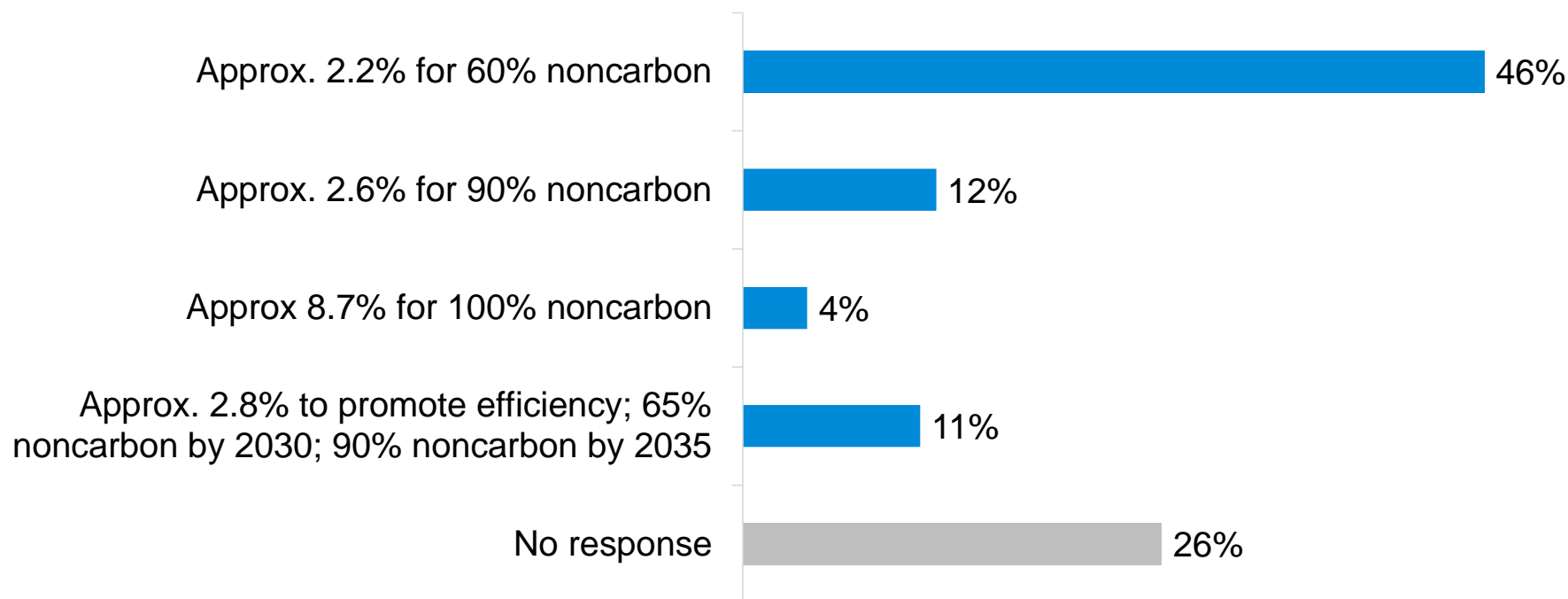
Service characteristics importance - commercial



Additional monthly amount willing to pay for noncarbon energy by 2030 - residential



Additional yearly amount willing to pay for noncarbon energy by 2030 - commercial



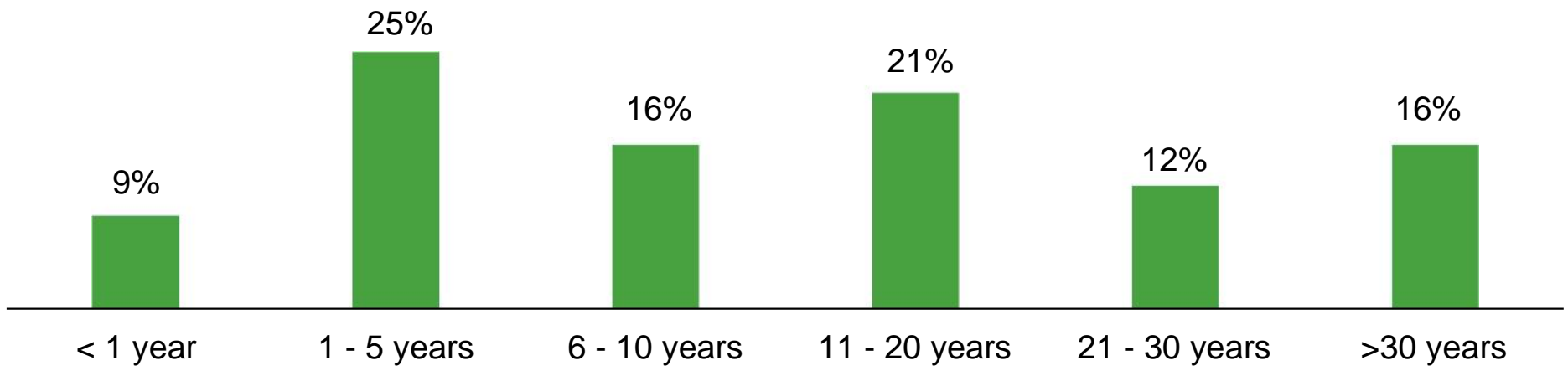


Demographics

Demographics

Length of service

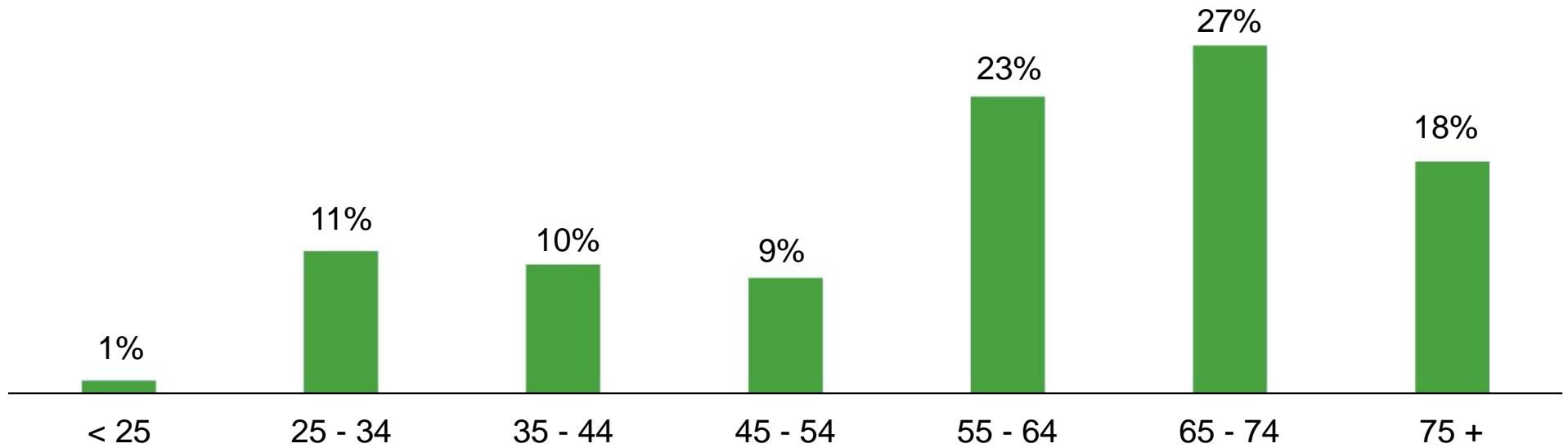
Median: 10 years



Demographics

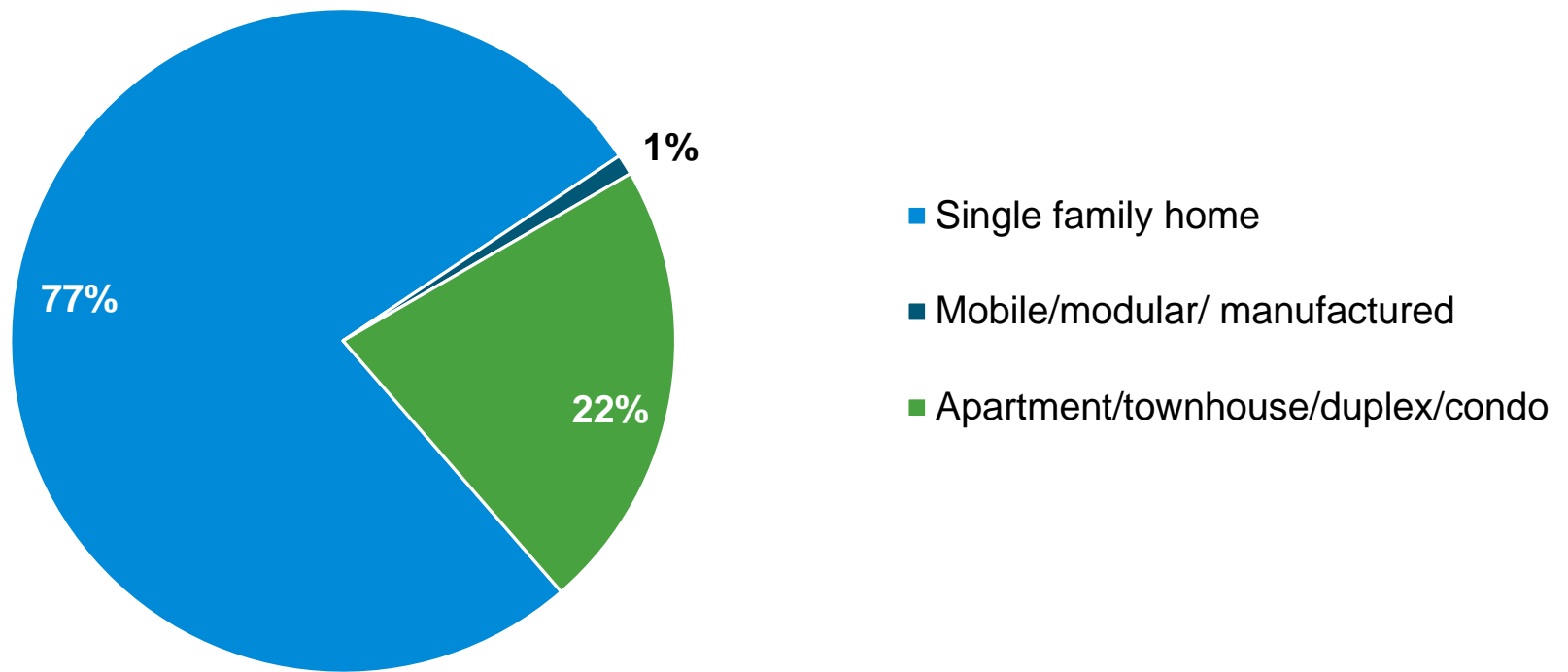
Respondent age

Median: 62



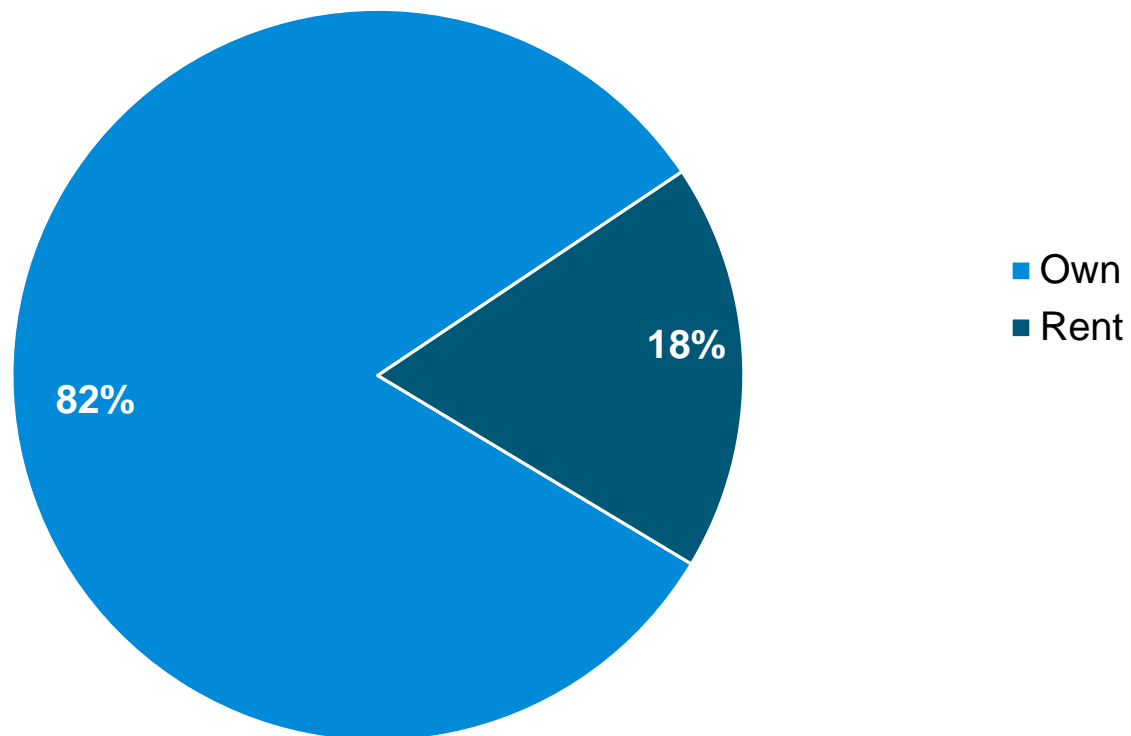
Demographics

Type of residence



Demographics

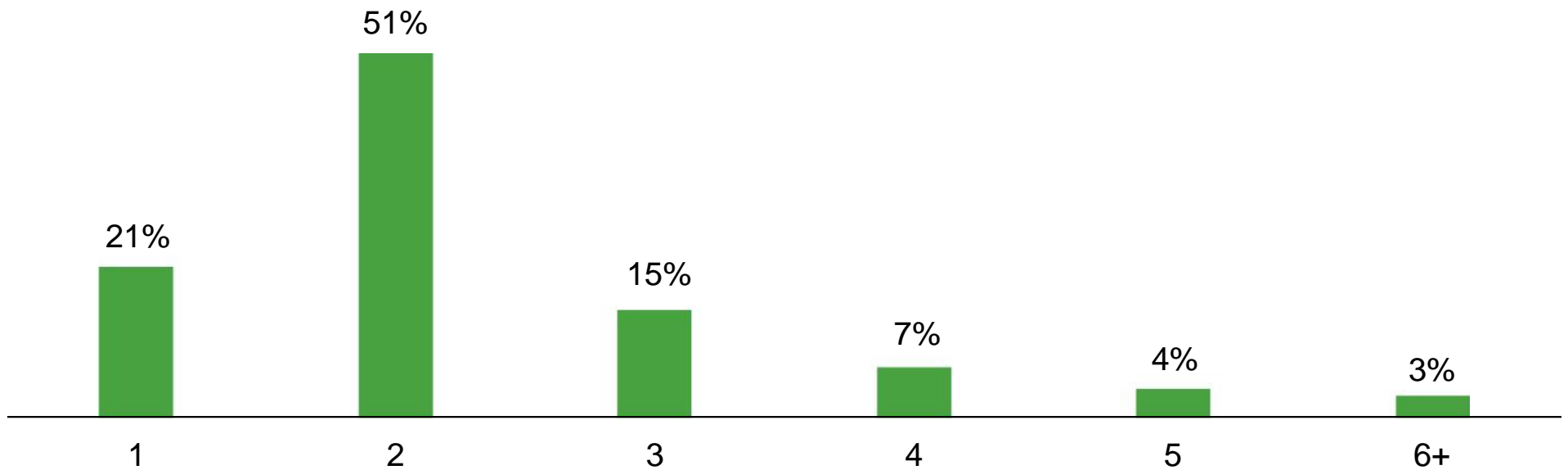
Home ownership



Demographics

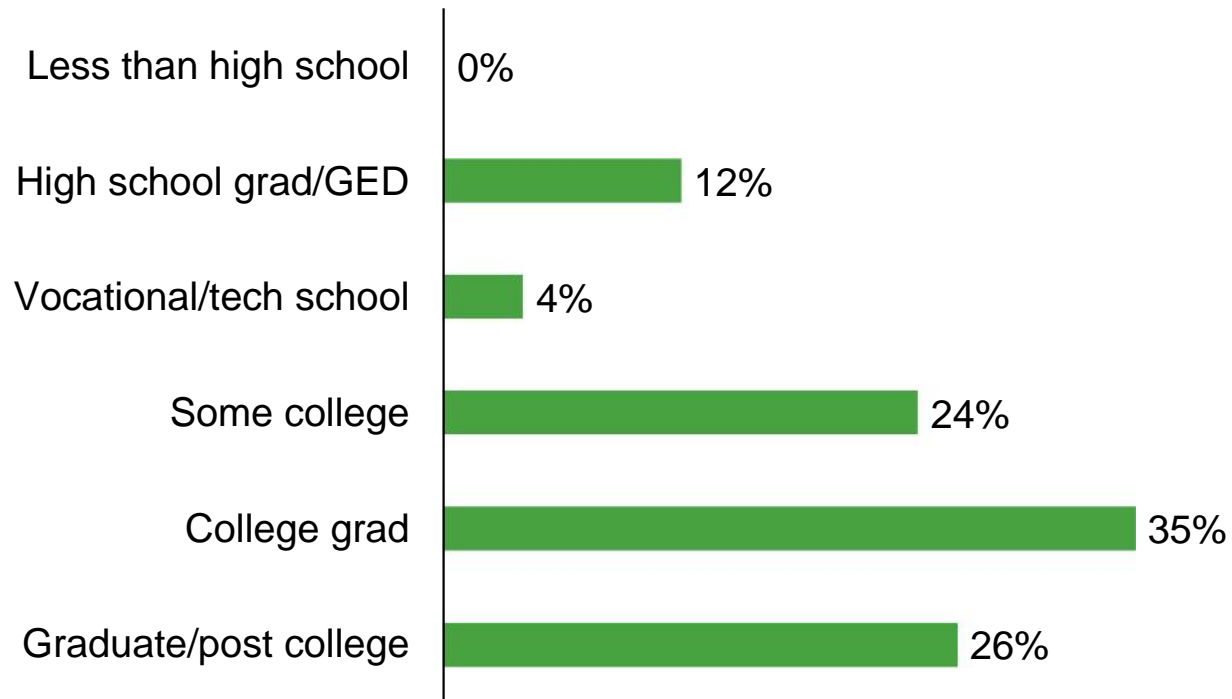
Number of residents per household

Mean: 2.3



Demographics

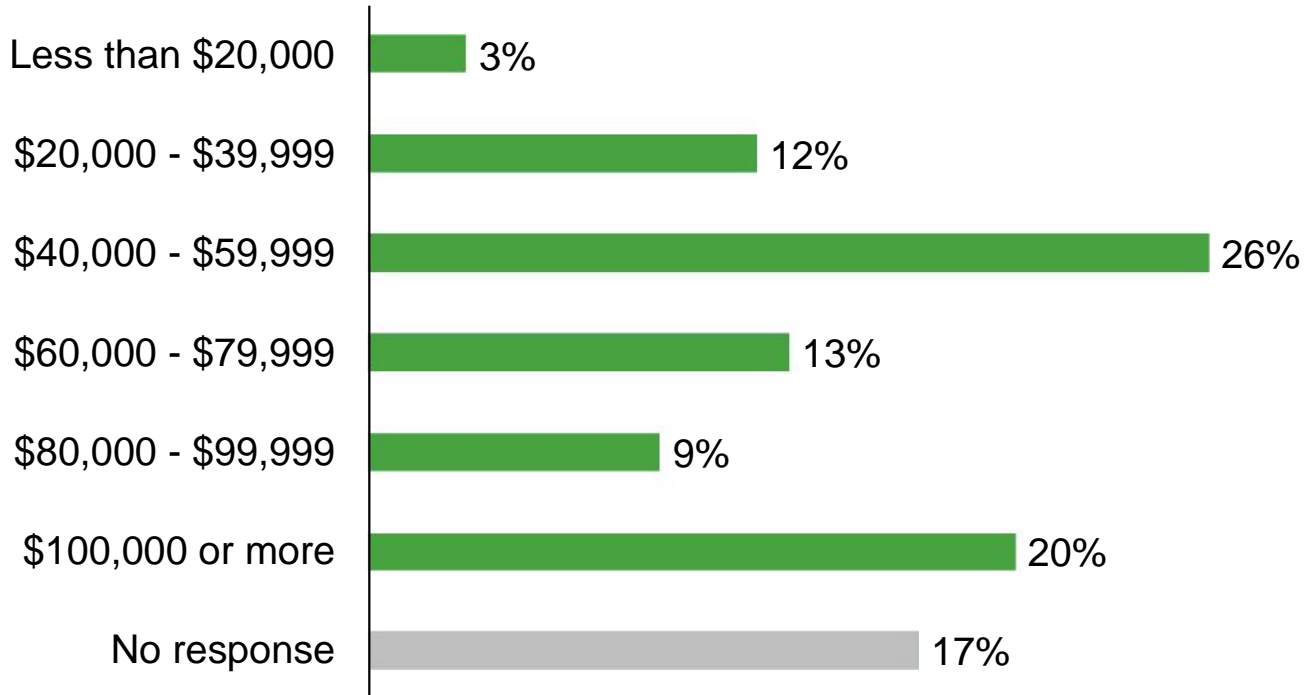
Education



Demographics

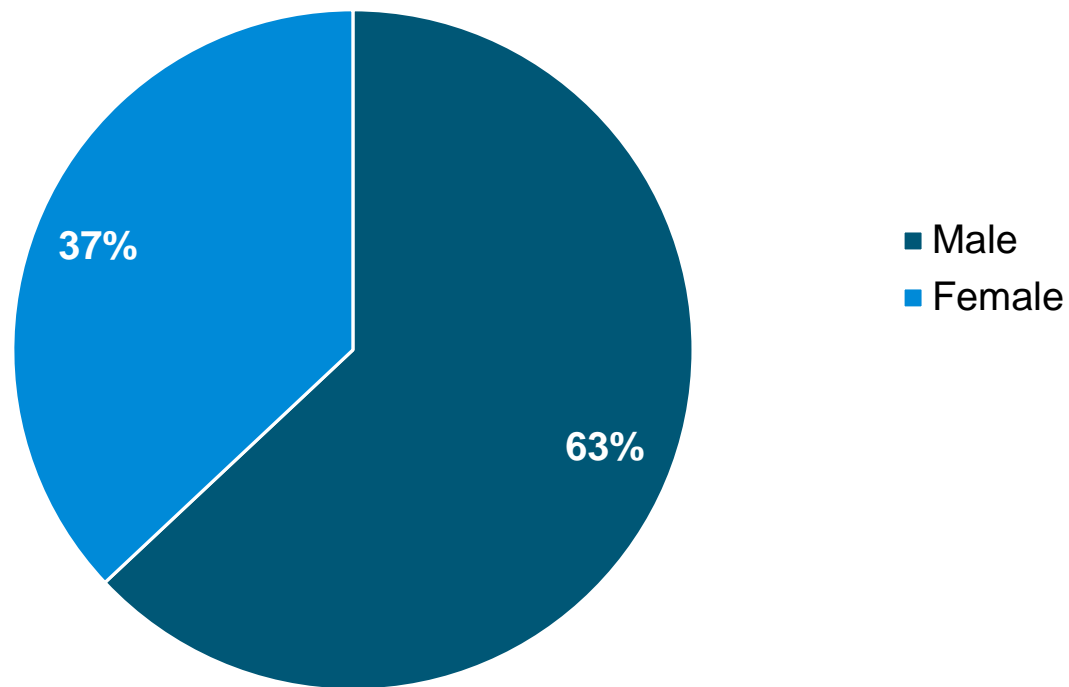
Income

Median: \$61,332



Demographics

Gender



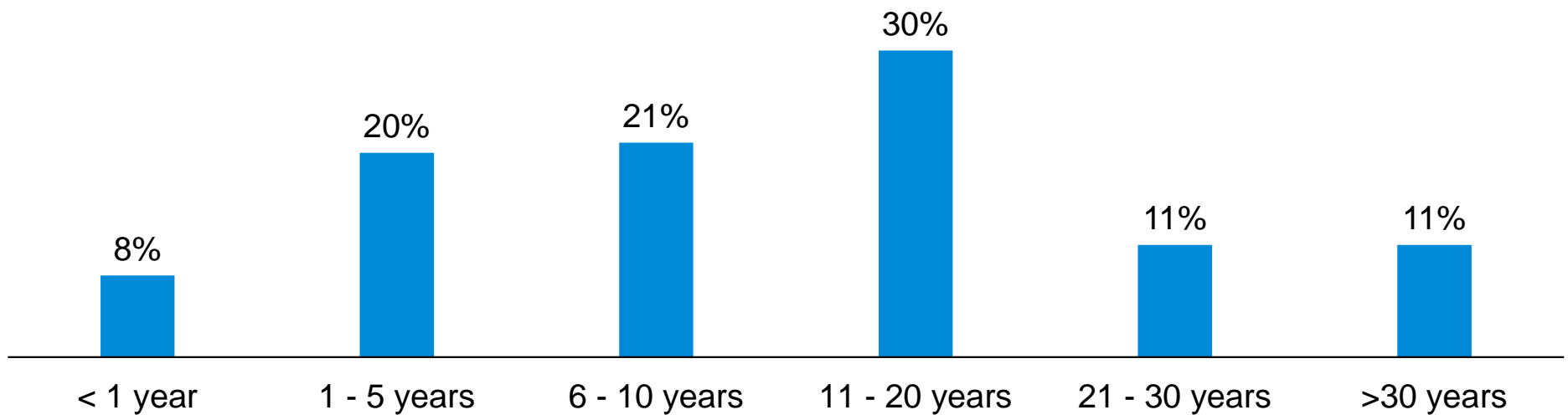


Firmographics

Firmographics

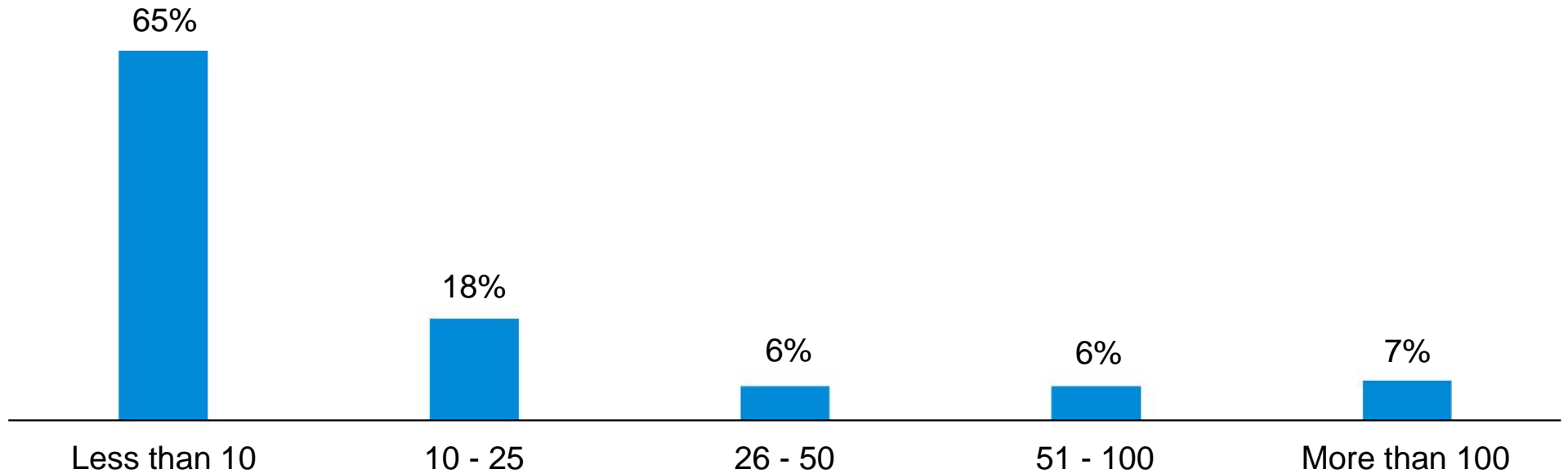
Length of service

Median: 10 years



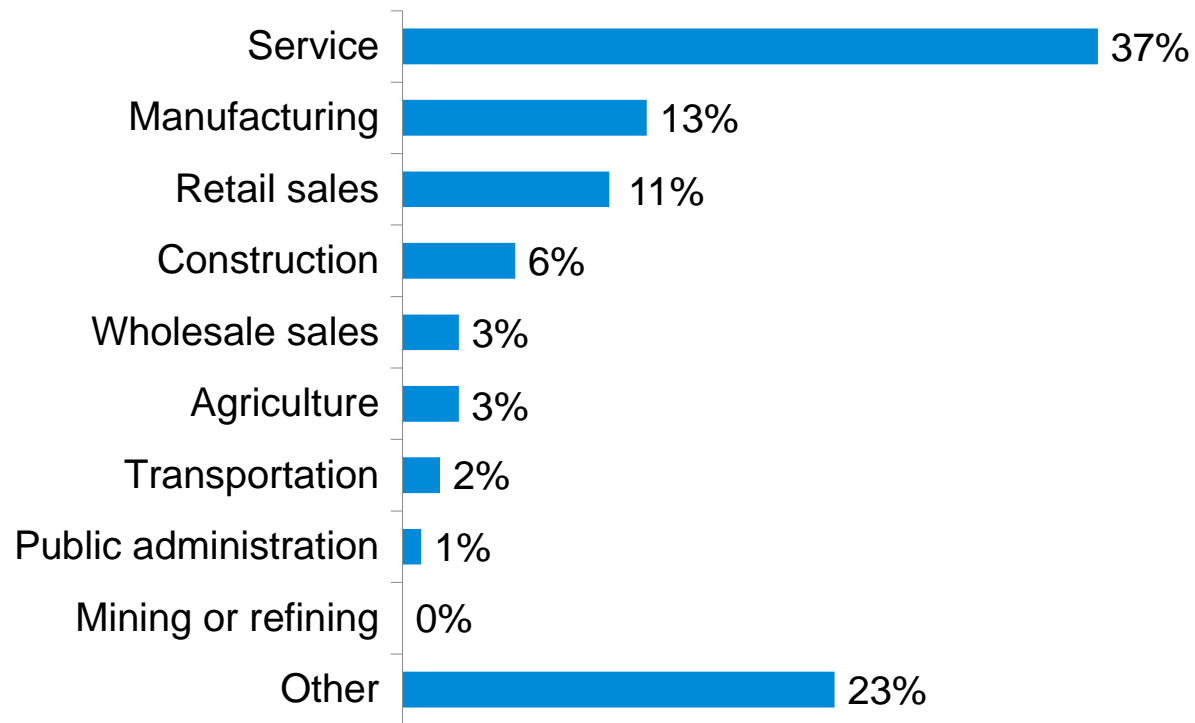
Firmographics

Number of employees



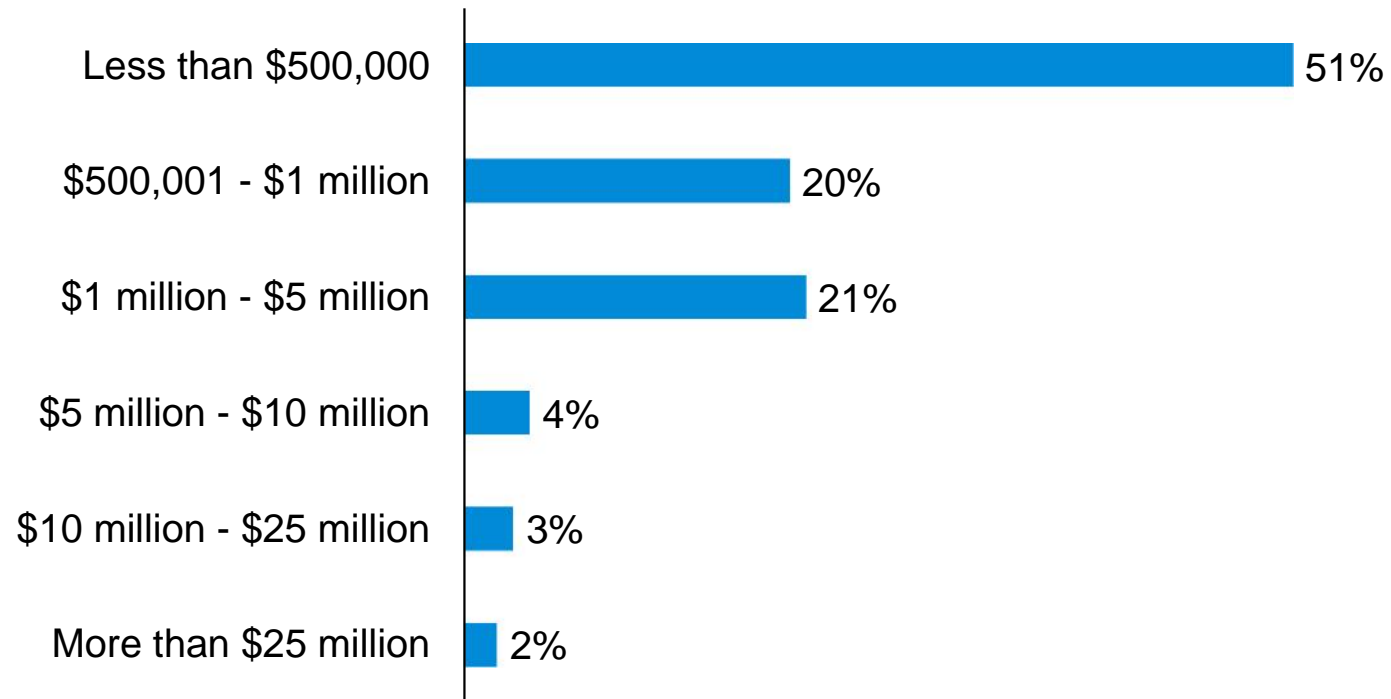
Firmographics

Business type



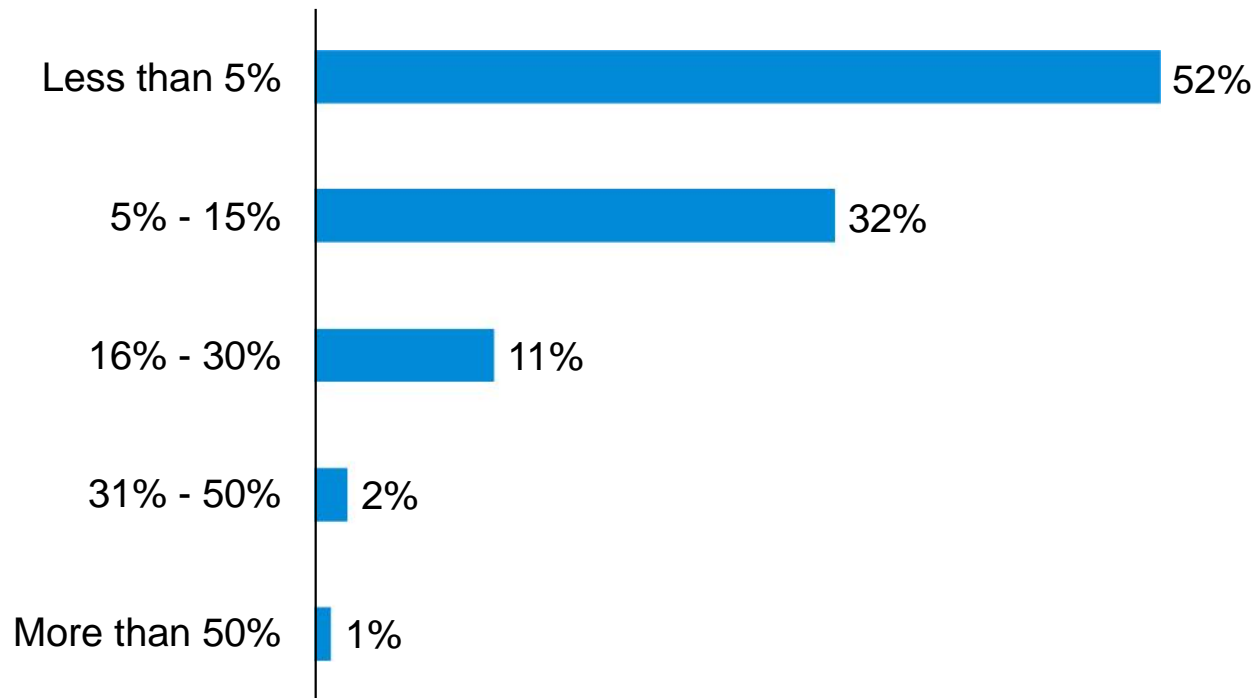
Firmographics

Annual revenue



Firmographics

Electric costs as percentage of overall expense




Customer notification

Your Opinion Counts!


As the wholesale power provider to Loveland Water and 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 March 20, 2020



Go to:
www.bit.ly/respr20
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 970-962-3000

Survey questions

- › How long have you received electric service from Loveland Water and Power?
- › Are you aware that Platte River Power Authority provides wholesale electricity generation and transmission services to Loveland Water and 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 community 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 the Efficiency Works program to help you use energy wisely
- › Please rate the importance of the following electric service characteristics:
 - Lowest possible cost
 - Most reliable
 - Noncarbon resources
- › How much more would you pay on your utility bill to receive noncarbon energy?

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?

2020 IRP Survey Results

	Online	Phone											
Residential: Results based on 258 responses	60%	40%											
Commercial: Results based on 238 responses	36%	64%											
1. How long have you received electric service from Loveland Water and Power?													
	Residential	Commercial											
Less than 1 year	9%	8%											
1 - 5 years	25%	20%											
6 - 10 years	16%	21%											
11 - 20 years	21%	30%											
21 - 30 years	12%	11%											
More than 30 years	16%	11%											
Median length of service	10	10											
2. Are you aware that Platte River Power Authority provides wholesale electricity generation and transmission services to Loveland Water and Power?													
	Residential	Commercial											
Yes	61%	53%											
No	39%	47%											
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	2%	1%	1%	1%	25%	7%	9%	18%	13%	23%	7.3	54%	
Commercial	0%	0%	0%	1%	23%	11%	16%	16%	8%	24%	7.4	48%	
*Top Box = 8 - 10 ratings combined, or highest opinion.													
4. What resources do you think Platte River Power Authority uses to provide your community with electricity? (all that apply)													
	Residential	Commercial											
Coal	58%	61%											
Hydropower	58%	42%											
Natural gas	67%	62%											
Solar power	63%	54%											
Wind power	52%	46%											

2020 IRP Survey Results

	Online	Phone											
Residential: Results based on 258 responses	60%	40%											
Commercial: Results based on 238 responses	36%	64%											
5. Please rate your level of agreement with the following statements regarding Platte River Power Authority.													
<i>*Top Box = 8 - 10 ratings combined, or strongest level of agreement.</i>	<i>Strongly disagree -----> Strongly agree</i>												
Residential	1	2	3	4	5	6	7	8	9	10	Average	Top Box	
Shows concern for the environment	1%	1%	1%	1%	27%	6%	15%	16%	10%	21%	7.1	47%	
Offers the Efficiency Works program to help you use energy wisely	2%	0%	2%	3%	26%	7%	11%	19%	10%	20%	7.1	49%	
Commercial	1	2	3	4	5	6	7	8	9	10	Average	Top Box	
Shows concern for the environment	0%	0%	0%	0%	27%	7%	22%	12%	10%	21%	7.3	43%	
Offers the Efficiency Works program to help you use energy wisely	0%	0%	1%	1%	30%	7%	19%	15%	7%	19%	7.1	41%	
6. Please rate the importance of the following electric service characteristics:													
<i>*Top Box = 8 - 10 ratings combined, or most important.</i>	<i>Not at all important -----> Very important</i>												
Residential	1	2	3	4	5	6	7	8	9	10	Average	Top Box	
Lowest possible cost	2%	0%	1%	2%	10%	4%	11%	14%	16%	41%	8.2	71%	
Most reliable	0%	0%	0%	0%	2%	1%	4%	13%	18%	61%	9.2	92%	
Noncarbon resources	9%	2%	2%	2%	15%	5%	8%	18%	11%	27%	7.0	56%	
Commercial	1	2	3	4	5	6	7	8	9	10	Average	Top Box	
Lowest possible cost	1%	1%	1%	2%	10%	4%	8%	22%	15%	37%	8.2	74%	
Reliable service	0%	0%	0%	0%	1%	0%	2%	19%	11%	67%	9.4	97%	
Noncarbon resources	12%	1%	2%	3%	17%	13%	10%	13%	7%	21%	6.5	41%	

	Online	Phone												
Residential: Results based on 258 responses	60%	40%												
Commercial: Results based on 238 responses	36%	64%												
7. How much more would you pay on your utility bill to receive noncarbon energy?														
	Residential Commercial													
About 2.2% more each year to receive 60% noncarbon energy by 2030 with 99.99% reliability	36%	46%												
Approximately 2.6% more each year to receive 90% noncarbon energy by 2030 with 99.99% reliability	26%	12%												
Approximately 8.7% more each year to receive 100% noncarbon energy by 2030 although Platte River cannot maintain system reliability	8%	4%												
About 2.8% more each year to promote more efficiency, rooftop solar, EVs, etc. You would receive 65% noncarbon energy by 2030 and 90% noncarbon energy by 2035 with 99.99% reliability	10%	11%												
No response	19%	26%												
Demographics														
D1. How old are you?														
Under 25	1%		45 - 54	9%		75+	18%							
25 - 34	11%		55 - 64	23%										
35 - 44	10%		65 - 74	27%										
Median age: 62														
D2. What type of residence do you live in?														
Single-family home	77%													
Mobile, modular or manufactured home	1%													
Apartment, townhouse, duplex or condominium	22%													
D3. Do you own or rent your home?	Own	82%	Rent	18%										

2020 IRP Survey Results

	Online	Phone											
Residential: Results based on 258 responses	60%	40%											
Commercial: Results based on 238 responses	36%	64%											
D4. How many people live in your household?													
	1	2	3	4	5	6+							
	21%	51%	15%	7%	4%	3%	Average:	2.3					
D5. What is the highest level of education you have completed?													
Less than high school	0%					Some college	24%						
High school graduate/GED	12%					College graduate	35%						
Vocational-technical school	4%					Graduate or post-college school	26%						
D6. What is your household income?													
Less than \$20,000	3%					\$80,000 to \$99,999	9%						
\$20,000 to \$39,999	12%					\$100,000 or more	20%						
\$40,000 to \$59,999	26%					No response	17%						
\$60,000 to \$79,999	13%												
Median income: \$61,332													
D7. Respondent's gender	Male	63%	Female	37%									
Firmographics													
F1. How many employees does your business have?													
Less than 10	65%												
10 to 25	18%												
26 to 50	6%												
51 to 100	6%												
More than 100	7%												

	Online	Phone												
Residential: Results based on 258 responses	60%	40%												
Commercial: Results based on 238 responses	36%	64%												
F2. What type of business do you have?														
Service	37%					Agriculture	3%							
Retail sales	11%					Mining or refining	0%							
Wholesale sales	3%					Transportation	2%							
Manufacturing	13%					Public administration	1%							
Construction	6%					Other	23%							
F3. What is the annual revenue of your business?														
Less than \$500,000	51%													
\$500,001 to \$1 million	20%													
\$1 million to \$5 million	21%													
\$5 million to \$10 million	4%													
\$10 million to \$25 million	3%													
More than \$25 million	2%													
F4. What is the percentage of electricity costs to your overall business costs?														
Less than 5%	52%													
5% to 15%	35%													
16% to 30%	11%													
31% to 50%	2%													
More than 50%	1%													

Loveland Water and Power IRP Residential Survey Trends				
	<i>n=266</i>	<i>n=258</i>		
Aware Platte River Provides Service to Loveland	2018	2020	Trend	Average
Yes	51%	61%	10%	56%
Opinion of Platte River Power Authority	2018	2020	Trend	Average
Somewhat/very favorable (<i>top box</i>)	56%	54%	-2%	55%
Not at all favorable (<i>bottom box</i>)	4%	4%	0%	4%
Average (<i>mean, based on 10-point scale</i>)	7.3	7.3	0.0	7.3
Perceived Generation Source	2018	2020	Trend	Average
Coal	63%	58%	-5%	61%
Hydropower	60%	58%	-2%	59%
Natural gas	55%	67%	12%	61%
Solar power	48%	63%	15%	56%
Wind power	48%	52%	4%	50%
Energy Efficiency Ratings (8-10 top box)	2018	2020	Trend	Average
Shows concern for the environment	49%	47%	-2%	48%
Average (<i>mean, based on 10-point scale</i>)	7.1	7.1	0.0	7.1
Offers the Efficiency Works program to help you use energy wisely	49%	49%	0%	49%
Average (<i>mean, based on 10-point scale</i>)	7.0	7.1	0.1	7.1
Importance of Electric Service Characteristics (8-10 top box)	2018	2020	Trend	Average
Lowest possible cost	75%	71%	-4%	73%
Average (<i>mean, based on 10-point scale</i>)	8.5	8.2	-0.3	8.4
Reliable service	93%	92%	-1%	93%
Average (<i>mean, based on 10-point scale</i>)	9.3	9.2	-0.1	9.3
Renewable resource	60%	56%	-4%	58%
Average (<i>mean, based on 10-point scale</i>)	7.6	7.0	-0.6	7.3
Length of Service	2018	2020	Trend	Average
Less than 1 year	10%	9%	-1%	10%
1 - 5 years	26%	25%	-1%	26%
6 - 10 years	14%	16%	2%	15%
11 - 20 years	21%	21%	0%	21%
21 - 30 years	13%	12%	-1%	13%
More than 30 years	15%	16%	1%	16%
Median	10	10	0	10
Age	2018	2020	Trend	Average
< 25	2%	1%	-1%	2%
25-34	14%	11%	-3%	13%
35-44	12%	10%	-2%	11%
45-54	15%	9%	-6%	12%
55-64	20%	23%	3%	22%
65-74	22%	27%	5%	25%
75 and up	15%	18%	3%	17%
Median	58	62	4	60

Loveland Water and Power IRP Residential Survey Trends				
	<i>n</i> =266	<i>n</i> =258		
Type of Residency	2018	2020	Trend	Average
Single-family home	83%	77%	-6%	80%
Mobile, modular or manufactured home	1%	1%	0%	1%
Apartment, townhouse, duplex or condominium	16%	22%	6%	19%
Own or Rent Home	2018	2020	Trend	Average
Own	84%	82%	-2%	83%
Rent	16%	18%	2%	17%
Number of People in Household	2018	2020	Trend	Average
1	22%	21%	-1%	22%
2	52%	51%	-1%	52%
3	12%	15%	3%	14%
4	10%	7%	-3%	9%
5	2%	4%	2%	3%
6+	2%	3%	1%	3%
<i>Average</i>	2.2	2.3	0.1	2.3
Highest Level of Education	2018	2020	Trend	Average
Less than high school	1%	0%	-1%	1%
High school graduate/GED	13%	12%	-1%	13%
Vocational-technical school	8%	4%	-4%	6%
Some college	18%	24%	6%	21%
College graduate	37%	35%	-2%	36%
Graduate or post-college school	23%	26%	3%	25%
Household Income	2018	2020	Trend	Average
Less than \$20,000	6%	3%	-3%	4%
\$20,000 to \$39,999	18%	12%	-6%	15%
\$40,000 to \$59,999	16%	26%	10%	21%
\$60,000 to \$79,999	22%	13%	-9%	17%
\$80,000 to \$99,999	10%	9%	-1%	10%
\$100,000 or more	18%	20%	2%	19%
No response	11%	17%	6%	14%
<i>Average</i>	\$64,999	\$61,332	-\$3,667	\$63,166
Gender	2018	2020	Trend	Average
Male	53%	63%	10%	58%
Female	47%	37%	-10%	42%

Loveland Water and Power IRP Commercial Survey Trends				
	<i>n=251</i>	<i>n=238</i>		
Aware Platte River Provides Service to Loveland	2018	2020	Trend	Average
Yes	49%	53%	4%	51%
Opinion of Platte River Power Authority	2018	2020	Trend	Average
Somewhat/very favorable (<i>top box</i>)	55%	48%	-7%	52%
Not at all favorable (<i>bottom box</i>)	4%	0%	-4%	2%
Average (<i>mean, based on 10-point scale</i>)	7.4	7.4	0.0	7.4
Perceived Generation Source	2018	2020	Trend	Average
Coal	58%	61%	3%	60%
Hydropower	43%	42%	-1%	43%
Natural gas	58%	62%	4%	60%
Solar power	40%	54%	14%	47%
Wind power	42%	46%	4%	44%
Energy Efficiency Ratings (8-10 top box)	2018	2020	Trend	Average
Shows concern for the environment	49%	43%	-6%	46%
Average (<i>mean, based on 10-point scale</i>)	7.1	7.3	0.2	7.2
Offers the Efficiency Works program to help you use energy wisely	50%	41%	-9%	46%
Average (<i>mean, based on 10-point scale</i>)	7.0	7.1	0.1	7.1
Importance of Electric Service Characteristics (8-10 top box)	2018	2020	Trend	Average
Lowest possible cost	72%	74%	2%	73%
Average (<i>mean, based on 10-point scale</i>)	8.3	8.2	-0.1	8.3
Reliable service	97%	97%	0%	97%
Average (<i>mean, based on 10-point scale</i>)	9.6	9.4	-0.2	9.5
Renewable resource	56%	41%	-15%	49%
Average (<i>mean, based on 10-point scale</i>)	6.9	6.5	-0.4	6.7
Length of Service	2018	2020	Trend	Average
Less than 1 year	7%	8%	1%	8%
1 - 5 years	24%	20%	-4%	22%
6 - 10 years	22%	21%	-1%	22%
11 - 20 years	22%	30%	8%	26%
21 - 30 years	11%	11%	0%	11%
More than 30 years	14%	11%	-3%	13%
Median	9	10	1	10
Number of employees	2018	2020	Trend	Average
Less than 10	70%	65%	-5%	68%
10 to 25	14%	18%	4%	16%
26 to 50	8%	6%	-2%	7%
51 to 100	4%	6%	2%	5%
More than 100	4%	7%	3%	6%

Loveland Water and Power IRP Commercial Survey Trends				
Type of Business	2018	2020	Trend	Average
Service	56%	37%	-19%	47%
Retail sales	18%	11%	-7%	15%
Wholesale sales	0%	3%	3%	2%
Manufacturing	9%	13%	4%	11%
Construction	9%	6%	-3%	8%
Agriculture	1%	3%	2%	2%
Mining or refining	0%	0%	0%	0%
Transportation	2%	2%	0%	2%
Public administration	3%	1%	-2%	2%
Other	2%	23%	21%	13%
Annual Revenue	2018	2020	Trend	Average
Less than \$500,000	55%	51%	-4%	53%
\$500,001 to \$1 million	13%	20%	7%	17%
\$1 million to \$5 million	23%	21%	-2%	22%
\$5 million to \$10 million	4%	4%	0%	4%
\$10 million to \$25 million	2%	3%	1%	3%
More than \$25 million	2%	2%	0%	2%
Percentage of Electricity Costs to Overall Business Costs	2018	2020	Trend	Average
Less than 5%	60%	52%	-8%	56%
5% to 15%	31%	35%	4%	33%
16% to 30%	7%	11%	4%	9%
31% to 50%	2%	2%	0%	2%
More than 50%	0%	1%	1%	1%