



Chelan PUD Public Opinion Survey

KEY FINDINGS

April 29, 2019

The logo for Cocker Fennessy is located in the bottom right corner of the slide. It features the company name in a white, serif font, with 'Cocker' on the top line and 'Fennessy' on the bottom line, set against a solid orange square background.

Research Purpose

- Understand Chelan County Public Utility District (Chelan PUD) customers' perspectives, with an emphasis on:
 - Infrastructure aesthetics
 - Economic development role
 - Potential rate impacts
- Provide scientific, generalizable data
- Provide a baseline to inform communications and messaging

Scientific Survey of Chelan PUD Customers

- Size: n=600
- Sample: Chelan PUD customer list
- Mode: Mixed [online (76%) and phone (24%)]
- Survey length: 8-10 minutes
- Languages offered: English, Spanish
- Tested/Fielded: March 8-21, 2019
- Sponsor: Chelan PUD
- Weighted: Age/gender based on county data (2017, Washington Office of Financial Management)

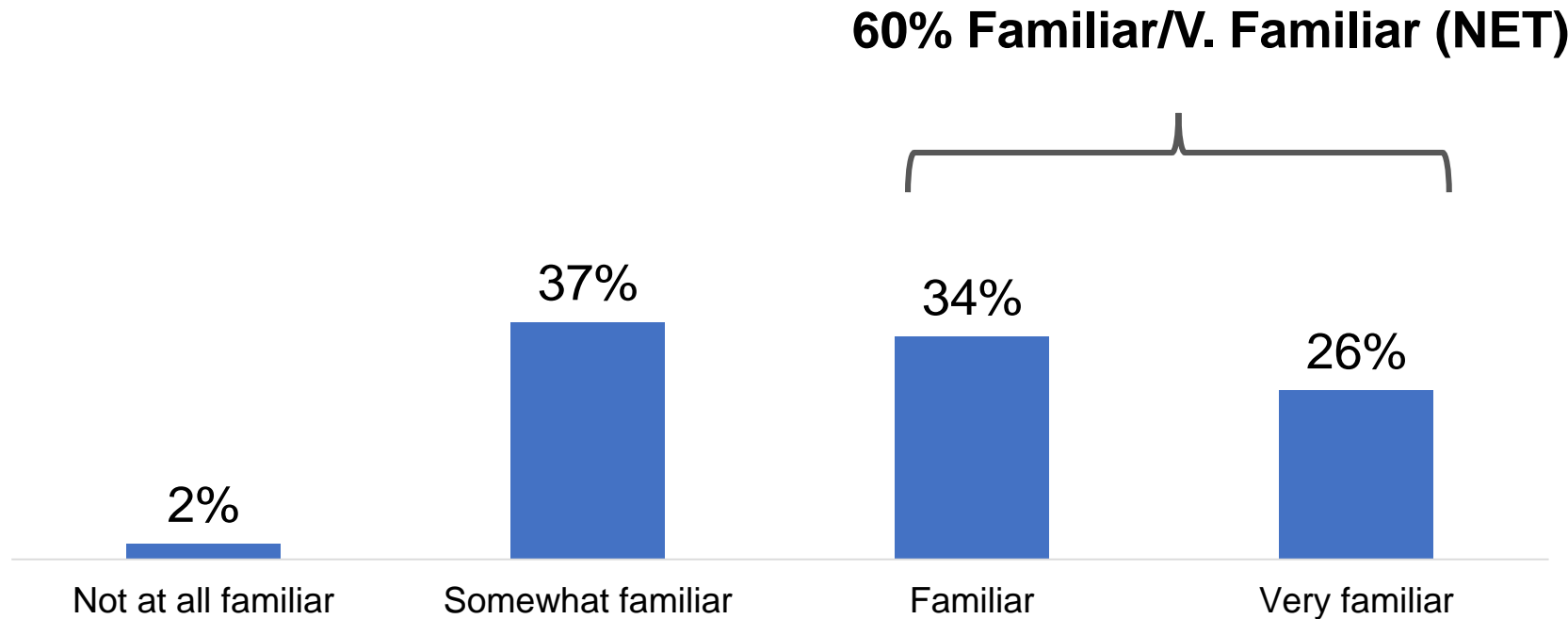
Research Methodology

Key Findings

1. Most customers are (97%) are at least somewhat familiar with the PUD and 60% are strongly familiar.
2. Chelan PUD's affordable electric rates are strongly valued (64%).
3. Few (33%) are concerned with electric infrastructure aesthetics—concerns are higher among those with 2nd homes in the area.
4. A majority (57%) believe only those who directly benefit from powerline conversion should have to pay for it.
5. On average, customers are willing to spend \$2-4 a month for an aesthetic improvement fund.
6. Few (28%) are strongly familiar with the PUD's role in economic development.
7. Customers overwhelmingly (91%) believe the PUD should keep rates low to attract jobs and investment in the community.
8. A slim majority (52%) support making investments in infrastructure ahead of need, even if it increases rates.
9. The average amount customers are willing to pay for advance infrastructure build out is \$2.00/month.
10. Customers want the PUD to prioritize affordability and reliability.

Most customers (97%) are at least somewhat familiar with the PUD and 60% are strongly familiar.

Q9 - How familiar are you with Chelan PUD?

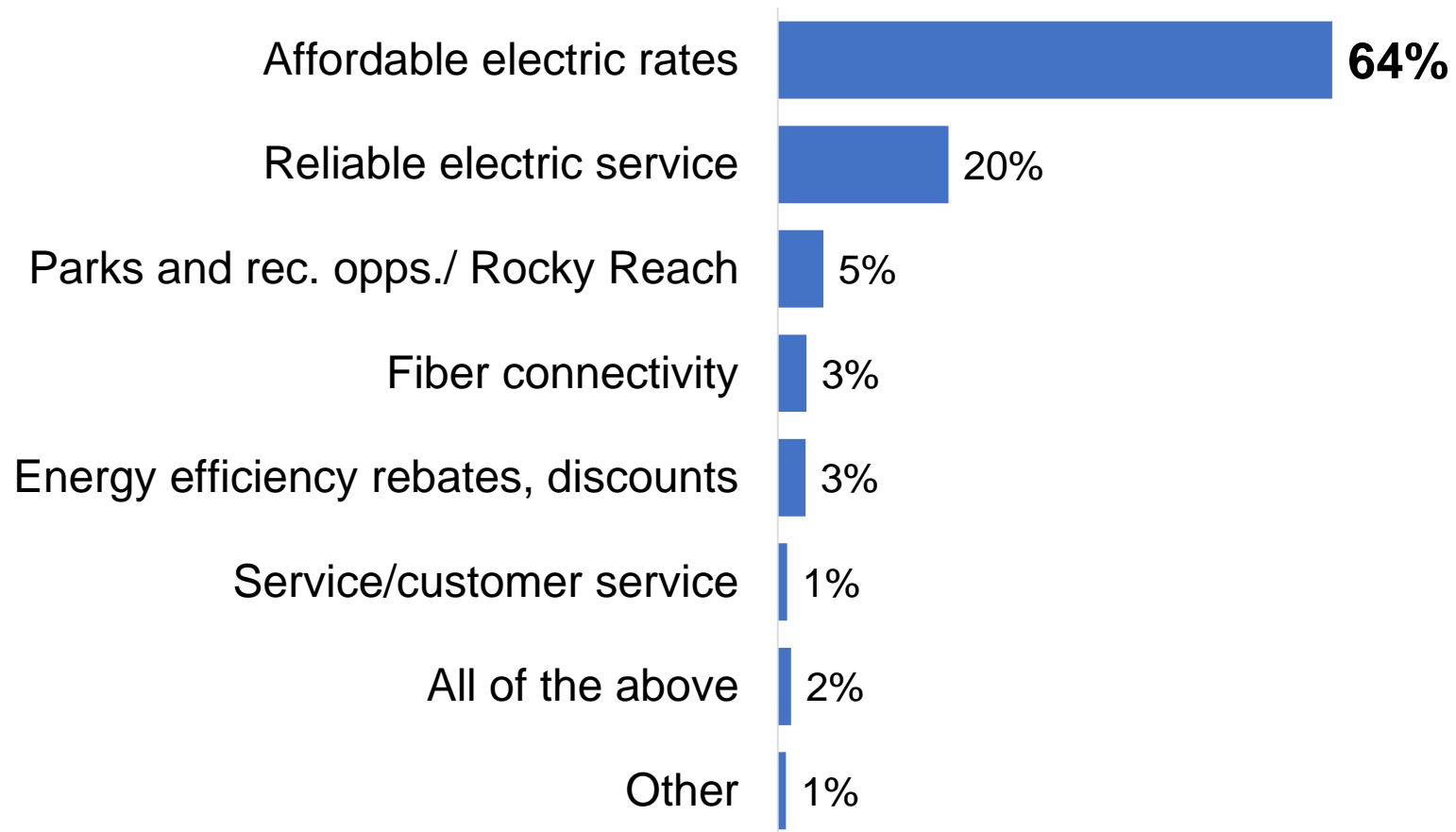


Those who are significantly more likely to be **familiar/v. familiar** with the PUD:

- In the region 20+ years (70%)
- Chelan Co. is their primary residence (65%)

Customers strongly value Chelan PUD's affordable rates—64% do so.

Q10 - What is the one thing you value most about Chelan PUD?



While affordability is highly valued across groups, feelings differ significantly by ethnicity, geography and time in the area.

Q10 - What is the one thing you value most about Chelan PUD?

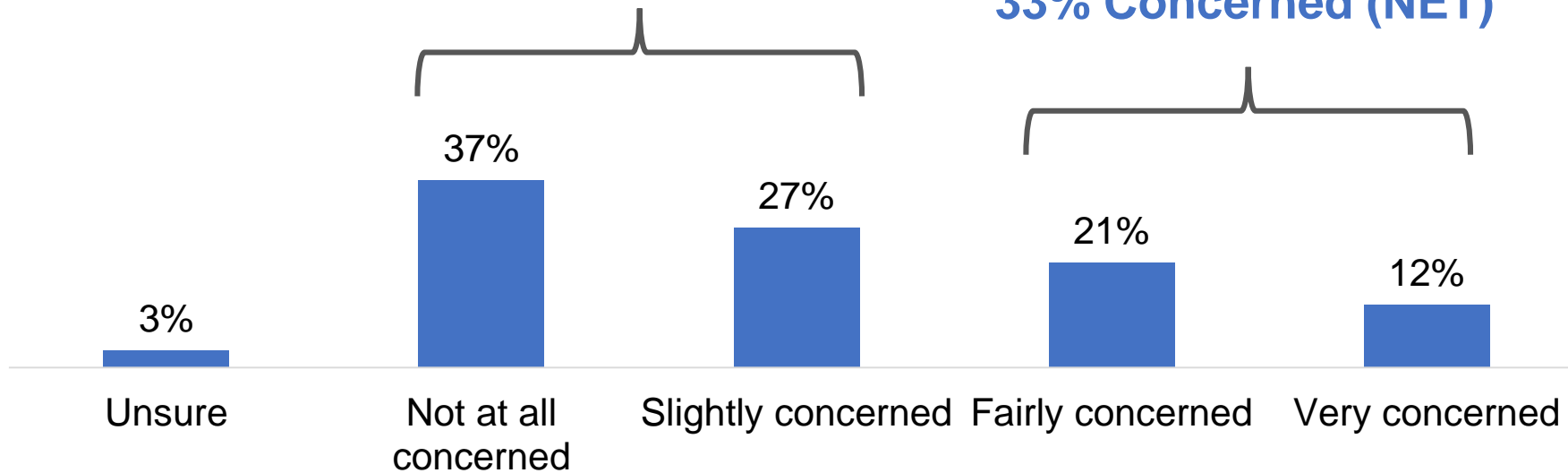
	ALL	Hispanic/ Latino	Malaga/ Wenatchee	Chelan/ Chelan Falls/ Manson	Lived in area <5 yrs
n=	600	71	280	105	157
Affordable electric rates	64%	37%	57%	77%	60%
Reliable electric service	20%	33%	23%	14%	13%
Parks and recreation opportunities/ Rocky Reach Discovery Center	5%	21%	7%	4%	13%

Few customers (33%) are concerned about aesthetic issues.

Q11 - How concerned are you, personally, about how overhead power lines and service substations look or impact views in the area?

64% Unconcerned (NET)

33% Concerned (NET)

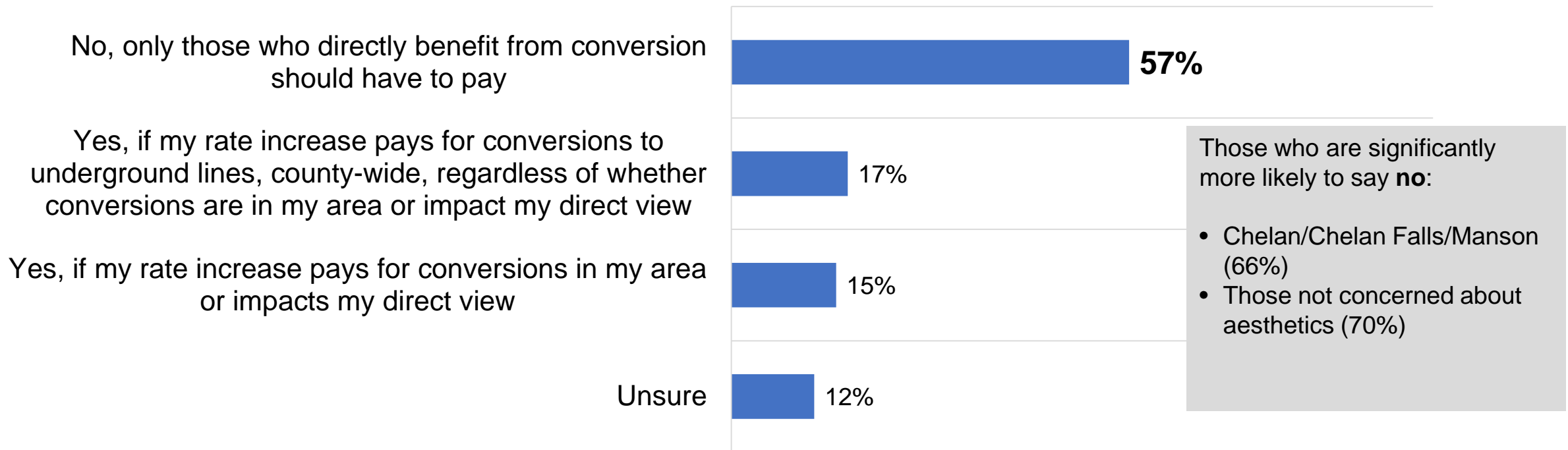


Those who are significantly more likely to be **fairly/very concerned**:

- Leavenworth (46%)
- Chelan County is not primary residence (44%)
- \$100k+ income (41%)
- Chelan Falls/ Chelan/ Manson (38%)
- Homeowner (36%)

A majority (57%) aren't willing to pay higher rates for the conversion of overhead powerlines to improve views.

Q12 - Would you be willing to pay higher rates for your electricity service if it allowed Chelan PUD to convert overhead power lines to underground for the purpose of improving area views?

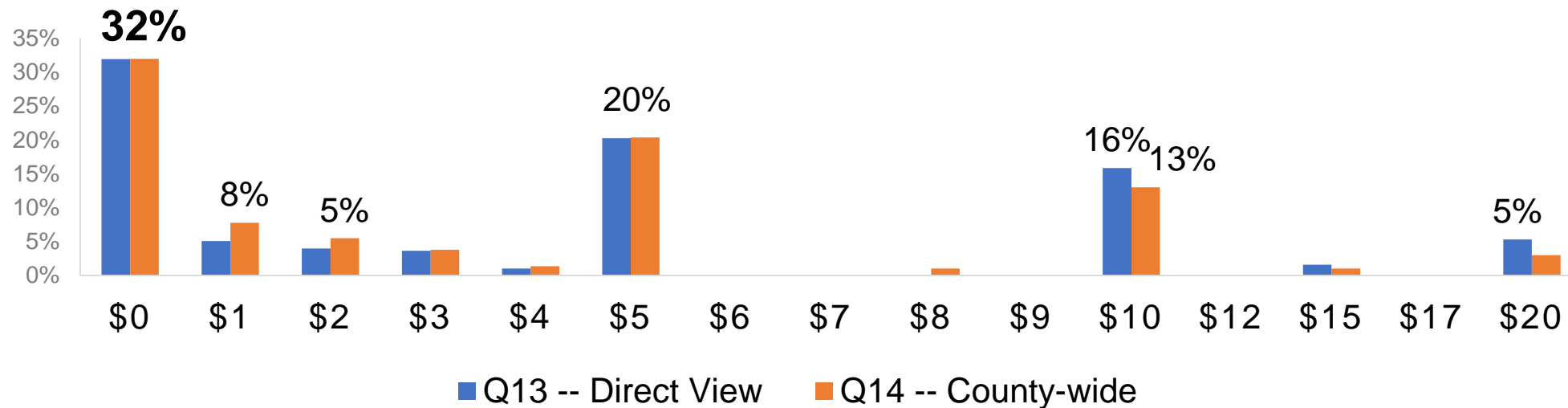


32% aren't willing to pay for an aesthetic improvement fund—whether there's a direct benefit or countywide.

Q13 - What if the Chelan PUD created an "aesthetic improvement fund" that funded the conversion of overhead power lines to underground on community supported and qualified projects that impacted your direct view?

Q14 - What if the "aesthetic improvement fund" funded the conversion of overhead power lines to underground on community supported and qualified projects throughout the county?

How much, if anything, would you be willing to pay into such a fund, if this monthly charge was in addition to your monthly power bill?

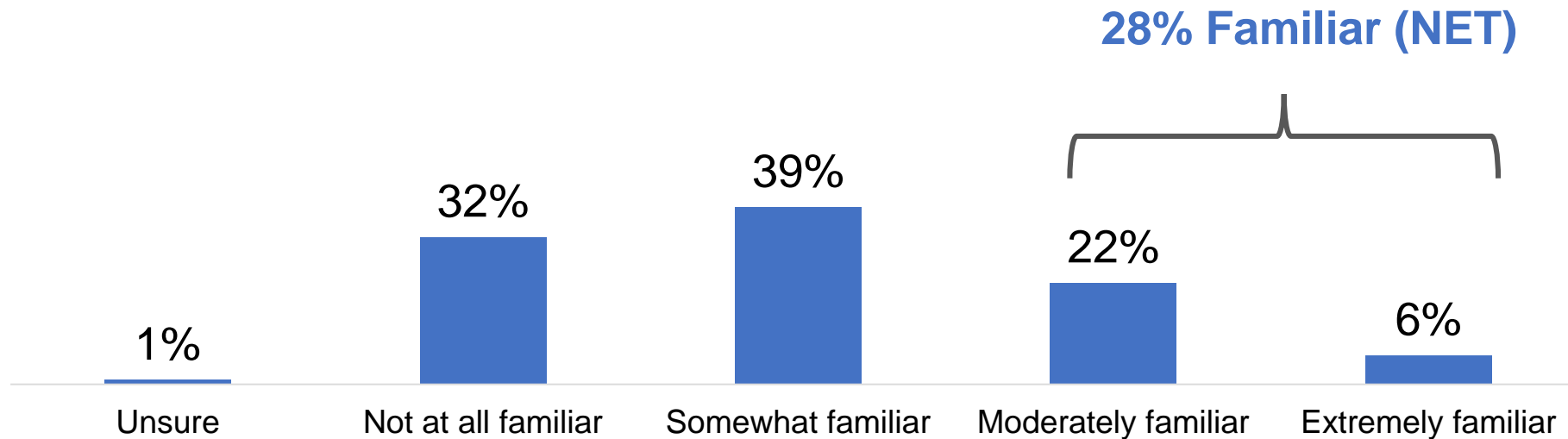


Average (median): \$4.00 \$2.00

Responses <5% not shown

Very few (28%) are strongly familiar with the PUD's role in economic development.

Q15 - How familiar are you with the Chelan County Public Utility District's role in local economic development?

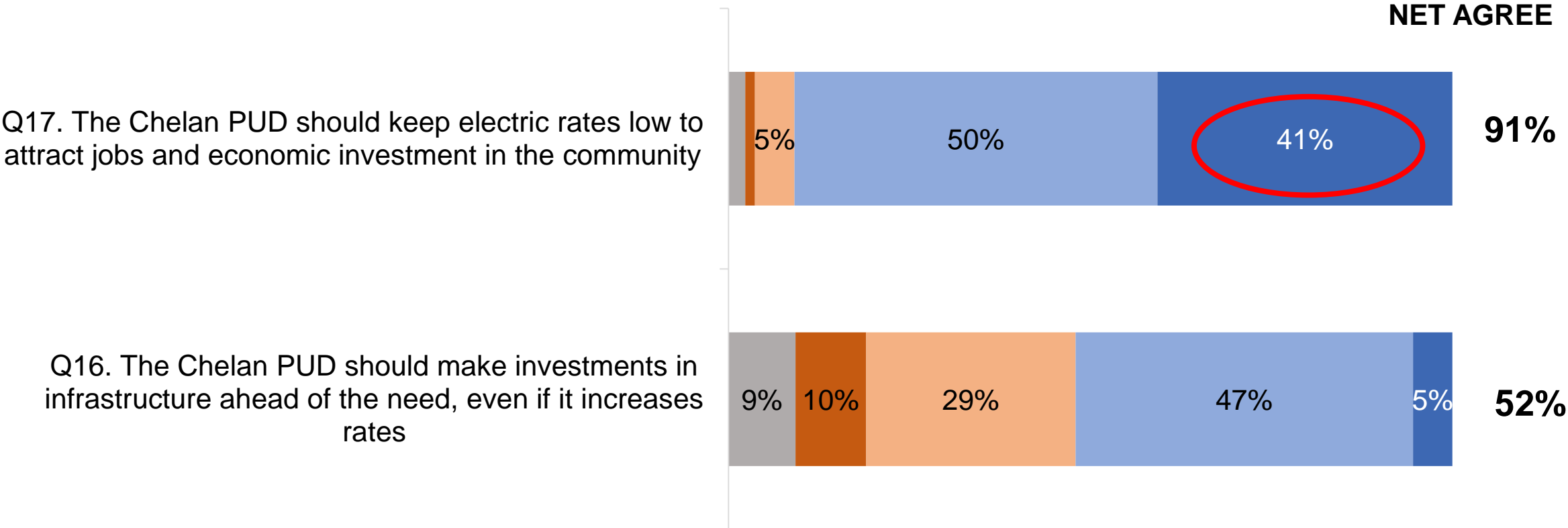


Those who are significantly more likely to say **Familiar/V. Familiar**:

- Familiar with the PUD (42%)
- \$100k+ income (36%)
- In area 20+ yrs. (34%)
- Chelan Co. is primary residence (30%)

An overwhelming majority (91%) want the PUD to keep rates low. A slim majority (52%) support infrastructure investments ahead of need, even if it increases rates.

■ Unsure ■ Strongly disagree ■ Disagree ■ Agree ■ Strongly Agree



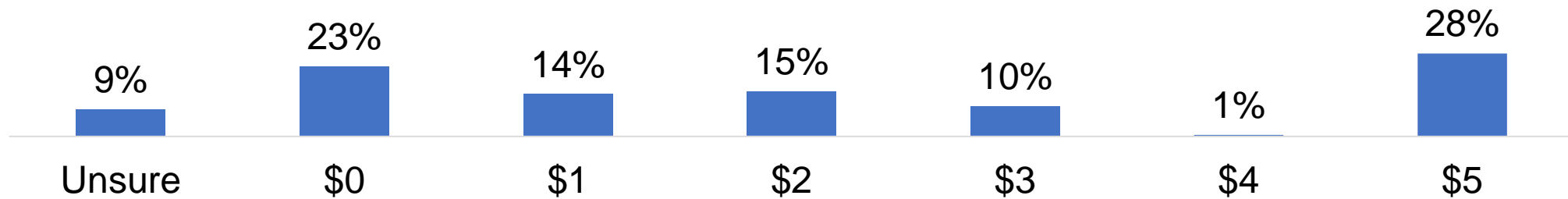
Responses <5% not shown

Feelings about the PUD's role in economic development differ by geography, income and time in region.

	Those significantly more likely to agree or strongly agree:
Q17. <i>The Chelan PUD should keep electric rates low to attract jobs and economic investment in the community.</i>	<ul style="list-style-type: none"> • Chelan Falls/Chelan/Manson (96%) • Income <\$50K (96%) • Value PUD affordability (95%)
Q16. <i>The Chelan PUD should make investments in infrastructure ahead of the need, even if it increases rates.</i>	<ul style="list-style-type: none"> • Not primary residence (63%) • Rent (62%) • \$100k+ income (60%) • <5 years in region (59%)

On average, customers are willing to pay \$2.00/month to cover the cost of building out infrastructure in advance of an actual increase in energy demand. 23% don't want to pay anything.

Q18 - If Chelan PUD had to raise rates to cover the costs associated with building out infrastructure prior to an actual increase in energy demand, what is the most you would be willing to pay, in addition to your current costs, to cover this expense?

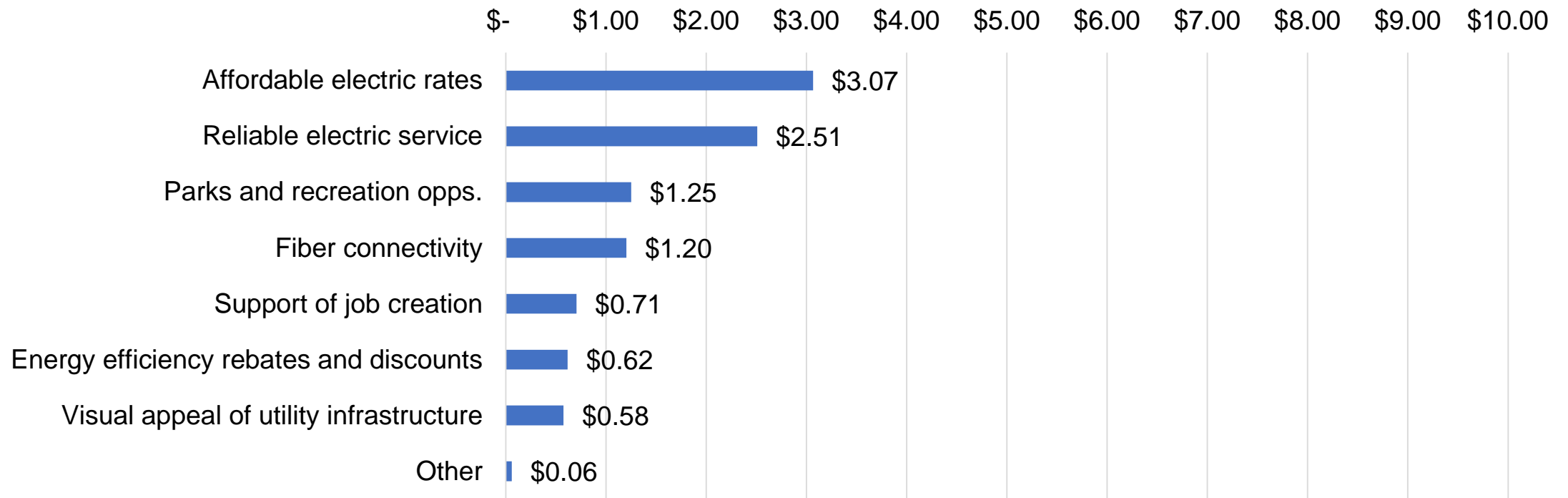


Average (median): \$2.00

Customers want the PUD to prioritize affordability and reliability. Addressing visual appeal is not a top priority.

Q19 - To summarize your opinions, we'd like you to allocate a total of \$10 across several potential Chelan PUD priority areas:

Average allocated



Discussion

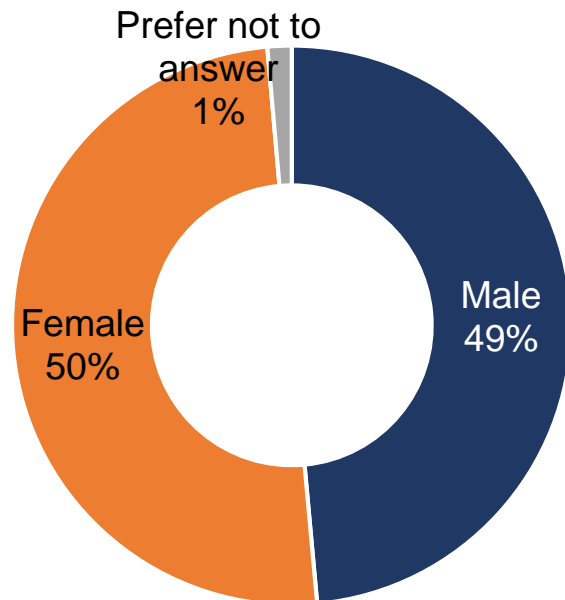
- Reactions
- Surprises
- Confirmations
- Additional questions

Demographics & Other Background

Gender and Age

Q26 - Which of the following ranges includes your age?

Q2-Gender



18-34 21%

35-44 14%

45-54 16%

55-59 9%

60-64 10%

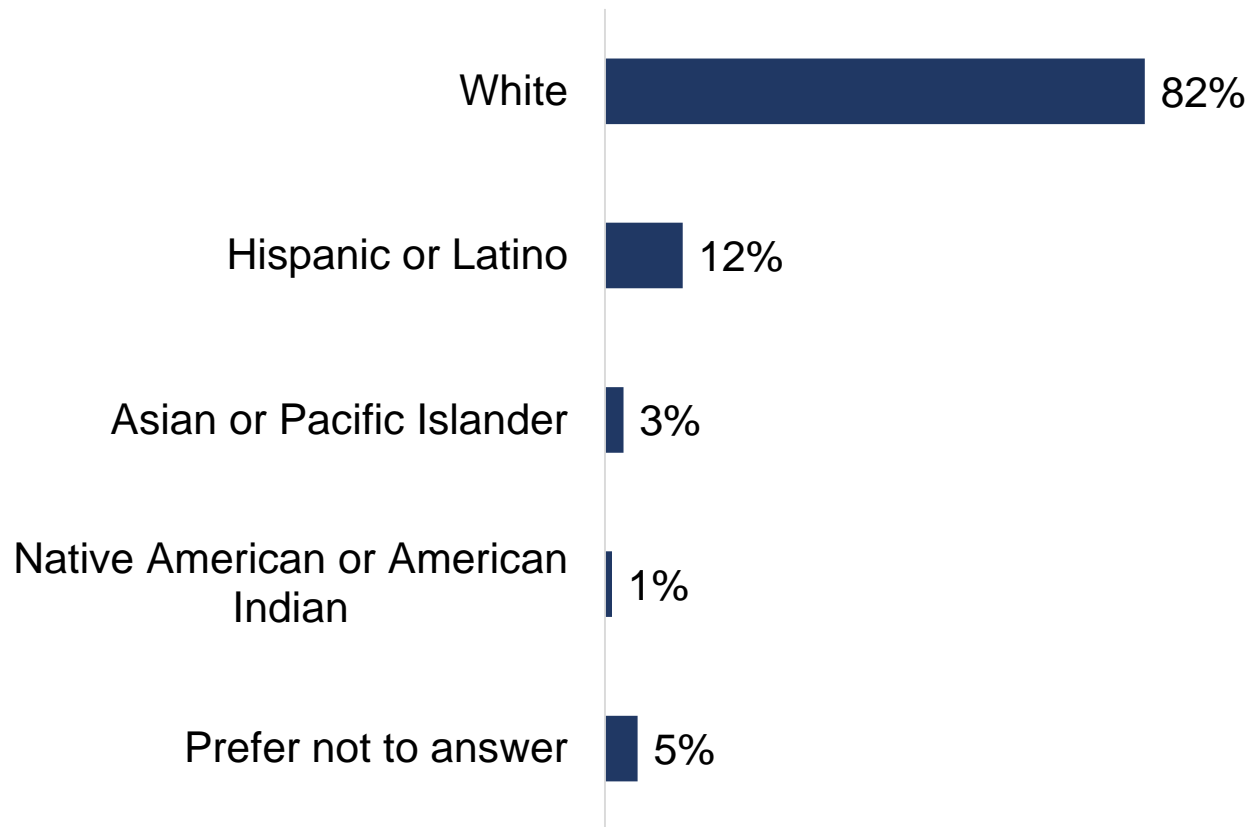
65-74 16%

75 and older 11%

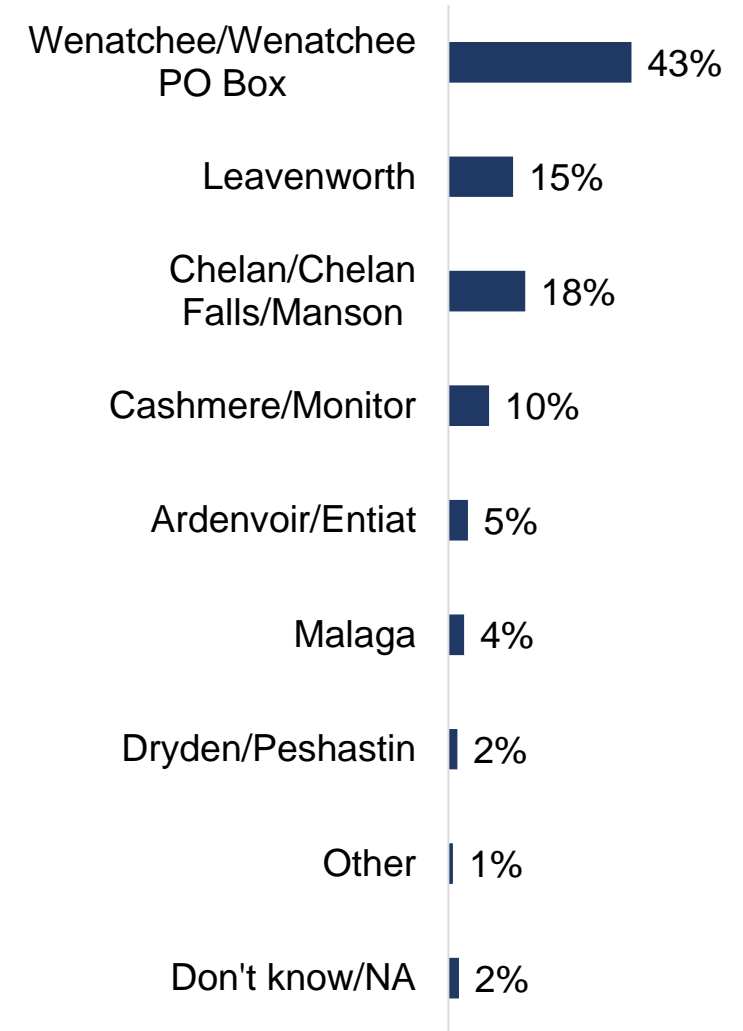
Prefer not to answer 2%

Race/Ethnicity and Geography

Q8 - To ensure we hear from a variety of perspectives in the community, we'd like to know your race or ethnicity.

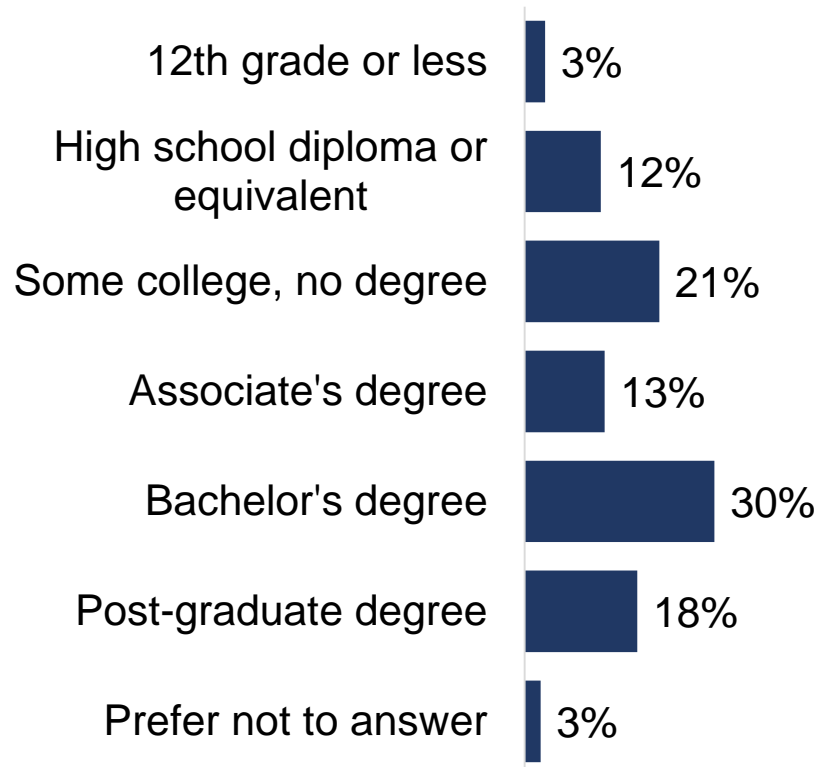


Q – Region (computed from zip codes)

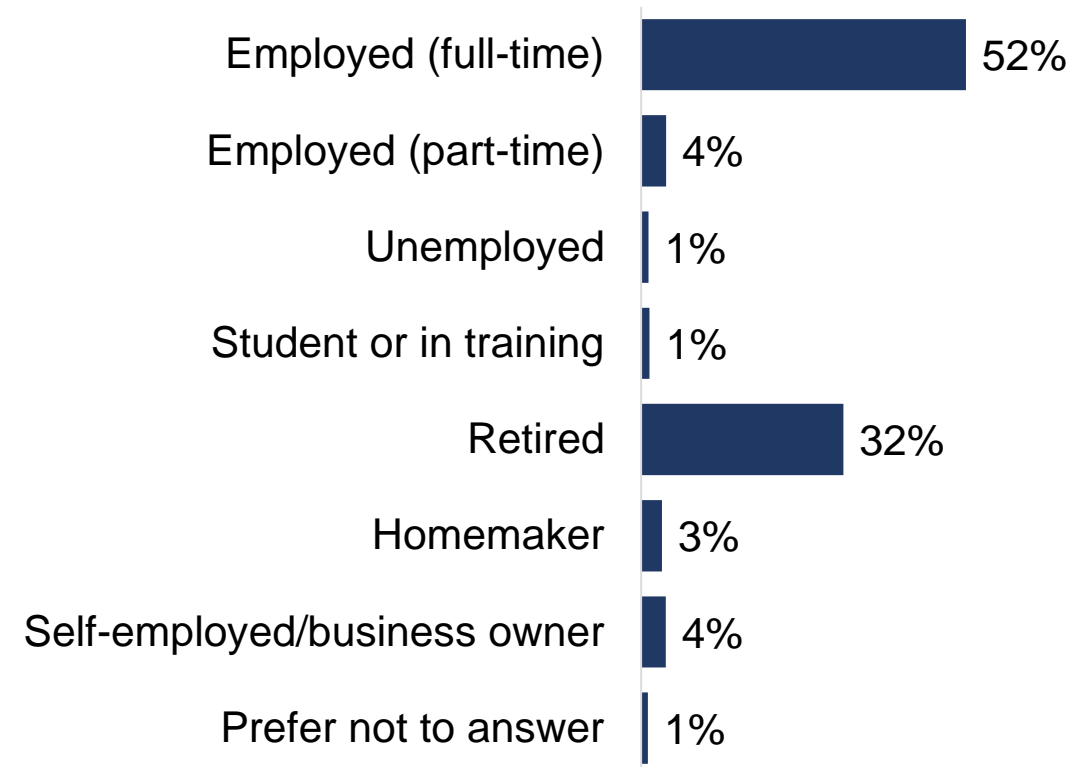


Education and Employment

Q22 - What is your highest level of education?

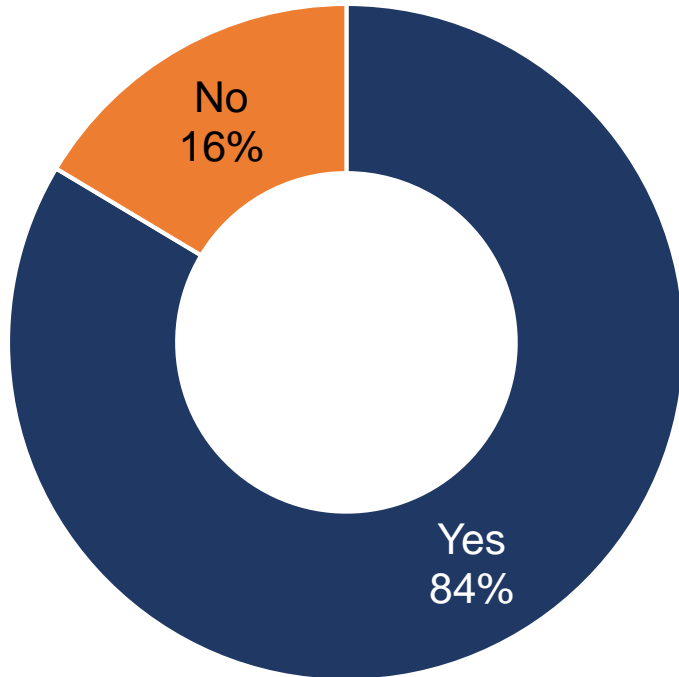


Q23 - Which of the following best describes your employment situation?

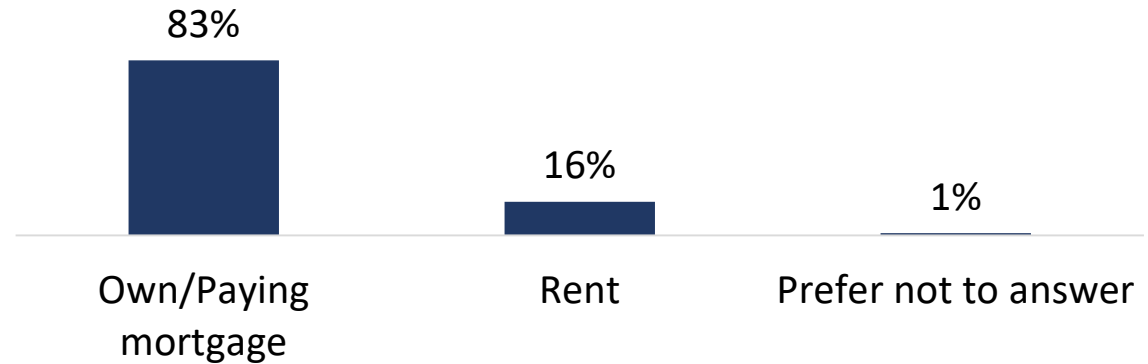


Home Ownership, Tenure and Type

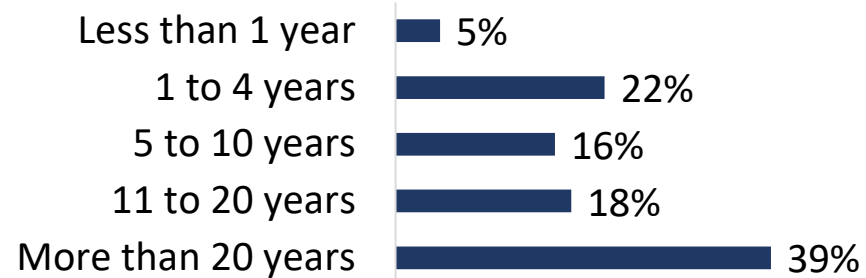
Q6 - Is this your primary residence?



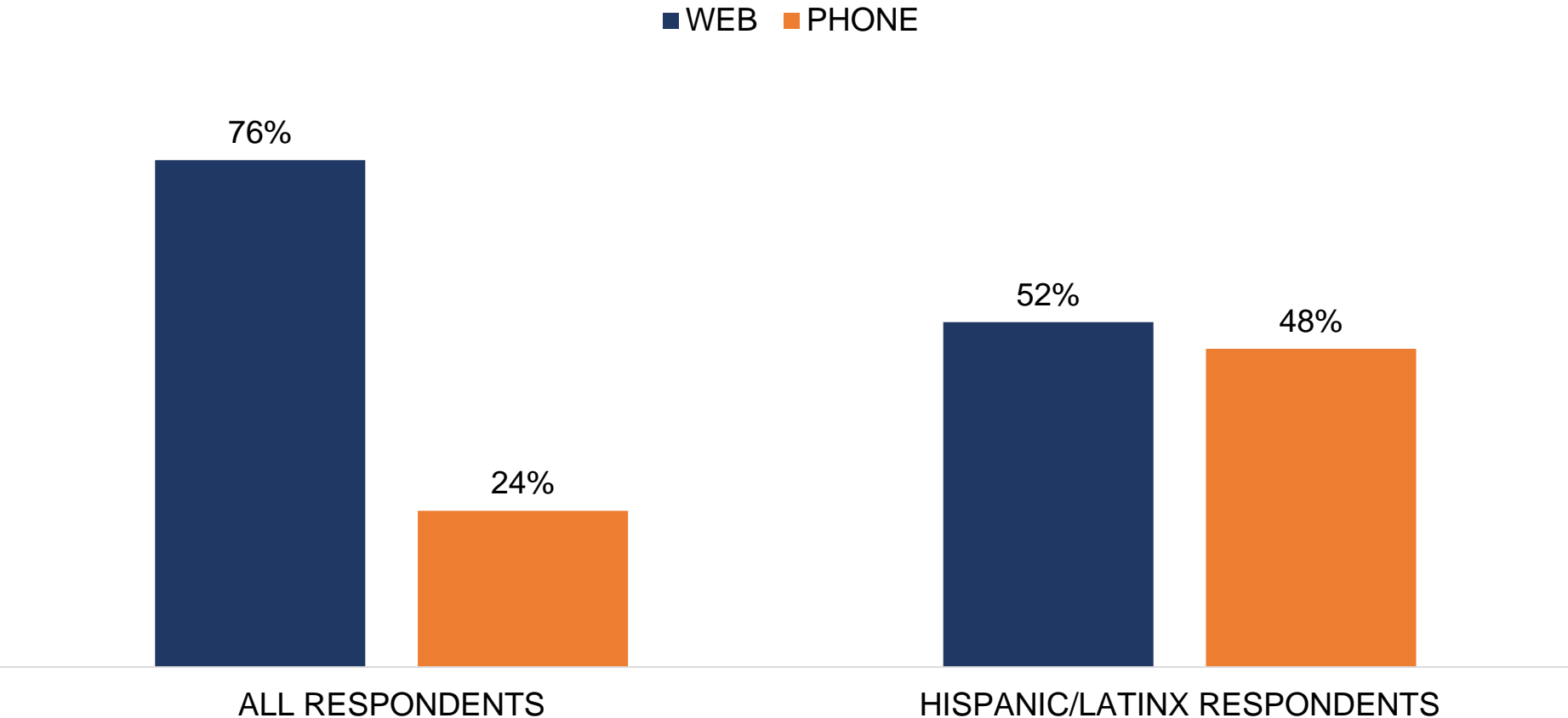
Q20 - Do you own or rent your home?



Q21 - How many years have you lived in or owned a home in Chelan County?



Survey Mode



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