OPALCO Member Survey 2018

Key Findings Overview
Project Goal

Measure member awareness and satisfaction for services and tools OPALCO provides and gain an understanding of unmet needs.
A 46-question survey was released to the OPALCO member base on April 17, 2018, and was closed on July 15, 2018. Members were contacted via email, phone and visits to senior centers and civic meetings. Members were offered a credit of $5 on their bill for participating.

The final sample size was 1,080 respondents, about 10% of the OPALCO member base.

Statistical analysis was conducted using advanced modeling techniques.
Survey Key Takeaways

- Majority of members feel OPALCO is reliable and, as long as their lights are on, they’re happy.

- The dissatisfied members continue to cite rising costs, lack of transparency and power outages.

- The purchase of Rock Island is a reason for both satisfaction and dissatisfaction, even for members who approve of OPALCO itself.

OPALCO Member Survey 2018
Demographics

OPALCO Member Survey 2018
Full-time Resident?

No - 20.7%

Yes - 79.3%

OPALCO Member Survey 2018
Months Per Year On Island

- Less than 3 months: 44.3%
- 3-6 months: 30.1%
- More than 6 months: 17.8%
- Other: 7.8%

OPALCO Member Survey 2018
Island You Live On

OPALCO Member Survey 2018

- San Juan Island: 42.4%
- Orcas Island: 38.1%
- Lopez Island: 15.4%
- Other: 4.1%
Work Status

OPALCO Member Survey 2018

- Work outside the home: 36.4%
- Retired: 44.1%
- Work at home: 14.5%
- Not actively working: 1.7%
- Other: 3.0%
- Student: 0.4%
 Household Income

OPALCO Member Survey 2018
Satisfaction & Trust

OPALCO Member Survey 2018
Key takeaways

1. Satisfaction is very high. Key drivers of satisfaction are: keeping members informed, taking members’ opinions into account, and rapid problem resolution.

2. Greatest areas of dissatisfaction are in keeping members informed, rising costs and the call center.

3. Co-op designation strongly matters to members, and don’t want OPALCO to move away from the co-op character.
Overall Satisfaction

83% Total for Satisfied & Very Satisfied

OPALCO Member Survey 2018
<table>
<thead>
<tr>
<th>Trust Category</th>
<th>Response Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trust</td>
<td>Strongly Agree</td>
<td>20.4%</td>
</tr>
<tr>
<td></td>
<td>Agree</td>
<td>42.4%</td>
</tr>
<tr>
<td></td>
<td>Neutral</td>
<td>27.2%</td>
</tr>
<tr>
<td></td>
<td>Disagree</td>
<td>5.7%</td>
</tr>
<tr>
<td></td>
<td>Strongly Disagree</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trust Category</th>
<th>Response Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>High Integrity</td>
<td>Strongly Agree</td>
<td>20.4%</td>
</tr>
<tr>
<td></td>
<td>Agree</td>
<td>42.4%</td>
</tr>
<tr>
<td></td>
<td>Neutral</td>
<td>27.2%</td>
</tr>
<tr>
<td></td>
<td>Disagree</td>
<td>5.7%</td>
</tr>
<tr>
<td></td>
<td>Strongly Disagree</td>
<td>2.9%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trust Category</th>
<th>Response Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Efficiently</td>
<td>Strongly Agree</td>
<td>18.7%</td>
</tr>
<tr>
<td></td>
<td>Agree</td>
<td>46.7%</td>
</tr>
<tr>
<td></td>
<td>Neutral</td>
<td>24.1%</td>
</tr>
<tr>
<td></td>
<td>Disagree</td>
<td>6.5%</td>
</tr>
<tr>
<td></td>
<td>Strongly Disagree</td>
<td>3.4%</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Trust Category</th>
<th>Response Level</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Do the Right Thing</td>
<td>Strongly Agree</td>
<td>16.8%</td>
</tr>
<tr>
<td></td>
<td>Agree</td>
<td>40.7%</td>
</tr>
<tr>
<td></td>
<td>Neutral</td>
<td>30.3%</td>
</tr>
<tr>
<td></td>
<td>Disagree</td>
<td>7.6%</td>
</tr>
<tr>
<td></td>
<td>Strongly Disagree</td>
<td>3.6%</td>
</tr>
</tbody>
</table>

OPALCO Member Survey 2018
## Performance Ratings

<table>
<thead>
<tr>
<th>Service Provided</th>
<th>Satisfied</th>
<th>Neutral</th>
<th>Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overall member service</td>
<td>88%</td>
<td>9%</td>
<td>1%</td>
</tr>
<tr>
<td>Courtesy and helpfulness of employees</td>
<td>86%</td>
<td>8%</td>
<td>0.90%</td>
</tr>
<tr>
<td>Restoration of power after an outage</td>
<td>85%</td>
<td>11%</td>
<td>3%</td>
</tr>
<tr>
<td>Reliability of electric service</td>
<td>83%</td>
<td>13%</td>
<td>4%</td>
</tr>
<tr>
<td>Highly trained, professional employees</td>
<td>82%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>Communicating, keeping members informed</td>
<td>80%</td>
<td>12%</td>
<td>2%</td>
</tr>
<tr>
<td>Environmental concern</td>
<td>77%</td>
<td>17%</td>
<td>4%</td>
</tr>
<tr>
<td>Speed and efficiency of responding to members</td>
<td>74%</td>
<td>14%</td>
<td>9%</td>
</tr>
<tr>
<td>Communicating outages</td>
<td>73%</td>
<td>16%</td>
<td>4%</td>
</tr>
<tr>
<td>Resolving issues/problems</td>
<td>73%</td>
<td>13%</td>
<td>3%</td>
</tr>
</tbody>
</table>
## Member Participation

<table>
<thead>
<tr>
<th>Activity</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Vote in annual board of directors election</td>
<td>57.6%</td>
</tr>
<tr>
<td>Attend annual meeting</td>
<td>23.8%</td>
</tr>
<tr>
<td>Project PAL (provide financial support for Project PAL or receive a grant)</td>
<td>21.9%</td>
</tr>
<tr>
<td>Attend public community meetings</td>
<td>19.6%</td>
</tr>
<tr>
<td>Support M.O.R.E. (member owned renewable energy)</td>
<td>11.0%</td>
</tr>
<tr>
<td>Attend monthly board meetings</td>
<td>3.8%</td>
</tr>
<tr>
<td>Participate in the Co-op Stewards program</td>
<td>2.1%</td>
</tr>
<tr>
<td>Participate in the Youth Scholarship Program</td>
<td>0.7%</td>
</tr>
<tr>
<td>Received a capital credit check (after 25 years of membership)</td>
<td>0.0%</td>
</tr>
<tr>
<td>Join a citizen advisory committee</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

**OPALCO Member Survey 2018**
### Importance of Co-op Classification

<table>
<thead>
<tr>
<th>Opinión</th>
<th>Porcentaje</th>
</tr>
</thead>
<tbody>
<tr>
<td>Muy importante</td>
<td>44.0%</td>
</tr>
<tr>
<td>Importante</td>
<td>37.3%</td>
</tr>
<tr>
<td>Neutral</td>
<td>15.7%</td>
</tr>
<tr>
<td>No importante</td>
<td>2.9%</td>
</tr>
<tr>
<td>No importa a mí</td>
<td>0.0%</td>
</tr>
</tbody>
</table>

OPALCO Member Survey 2018
Satisfied Member Perceptions

- Small and well-managed company
- Good local people and customer service
- Doing the best they can with a critical public service in remote area
Dissatisfied Member Perceptions

- Service is good but rates are high
- Less listened too; less of a co-op
- People answering phones don’t listen or have accurate information

OPALCO Member Survey 2018
Communication
Key takeaways

1. Communication efforts are perceived to be effective.

2. Website, eBill, and email newsletter are by far the most effective, but traditional communications such as bill inserts and newspapers still work well.

3. Strong demand for faster outage communication via more accessible methods (text, email, live phone responders, etc.).
Communication Effectiveness

OPALCO Member Survey 2018

75.3% Total for Very Effective And Effective
# How Do You Stay Connected?

<table>
<thead>
<tr>
<th>Method</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>SmartHub (eBill)</td>
<td>54.4%</td>
</tr>
<tr>
<td>OPALCO website (other than outage map)</td>
<td>50.0%</td>
</tr>
<tr>
<td>Email newsletter &quot;Co-op Connector&quot; or &quot;This Electric Life&quot;</td>
<td>38.5%</td>
</tr>
<tr>
<td>Outage map</td>
<td>36.1%</td>
</tr>
<tr>
<td>Newspapers</td>
<td>35.2%</td>
</tr>
<tr>
<td>OPALCO annual report</td>
<td>32.2%</td>
</tr>
<tr>
<td>Bill inserts</td>
<td>31.0%</td>
</tr>
<tr>
<td>Word of mouth</td>
<td>30.5%</td>
</tr>
<tr>
<td>Social media</td>
<td>24.3%</td>
</tr>
<tr>
<td>Local news blogs</td>
<td>17.6%</td>
</tr>
<tr>
<td>Public meetings</td>
<td>12.6%</td>
</tr>
<tr>
<td>Fliers/community boards</td>
<td>8.2%</td>
</tr>
<tr>
<td>Other</td>
<td>3.0%</td>
</tr>
</tbody>
</table>

OPALCO Member Survey 2018
How Do You Find Out About Outages?

OPALCO Member Survey 2018

- 17.4% OPALCO website
- 16.2% Outage map
- 9.7% Facebook
- 1.4% Twitter
- 29.0% Phone system
- 8.5% I do not use any of these
- 17.8% Other - Write In (Required)

Total for website and map: 33.6%
How often do you use the outage map?

- 57.5% Occasionally
- 19.6% Frequently
- 8.6% Very frequently
- 13.8% Rarely
- 0.5% Never

OPALCO Member Survey 2018
Rates
Key takeaways

QUESTION: Would you support raising rates to produce local renewable energy in order to keep emergency services powered up in times of need? IF SO: How much of a rate increase would you support?

1. 51.5% of respondents would support a rate increase *if they perceived it to be affordable.*
2. Almost a third of respondents would not support a rate increase.
3. Of respondents who would either support a rate increase outright or would support a rate increase “depending on affordability,” almost 60% would support a 1-2% rate increase and an additional 27% would support a 3-5% rate increase.
4. Only 13.9% of respondents would support above a 5% rate increase.

OPALCO Member Survey 2018
Support for Raising Rates for Renewable Energy

- 17.8% Yes
- 30.7% No
- 51.5% Depends on affordability
Acceptable Level to Raise Rates for Renewable Energy

- 10% would support “Whatever it takes to keep us safe”
- 3.9% would support a 5-10% rate increase
- 26.8% would support a 3-5% rate increase
- 59.3% would support a 1-2% rate increase

OPALCO Member Survey 2018
Energy Efficiency

OPALCO Member Survey 2018
Key takeaways

1. Overall high satisfaction with efficiency programs,

2. Opportunity for improvement in awareness about energy rebates

3. Belief that potential savings from energy efficiency are very limited due to rate structure

OPALCO Member Survey 2018
Satisfaction with Efficiency Programs

OPALCO Member Survey 2018

- Satisfied: 40.6%
- Very Satisfied: 16.4%
- Neutral: 36.5%
- Dissatisfied: 2.3%
- Very Dissatisfied: 0.7%
- Not Applicable: 3.6%

57% Total for Satisfied & Very Satisfied
Energy Rebates Usage

- Not Applicable: 19.4%
- Yes: 31.5%
- No: 49.1%

OPALCO Member Survey 2018
### Energy Rebates Used

<table>
<thead>
<tr>
<th>Item</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Appliances (clothes washer, refrigerator/freezer)</td>
<td>54.7%</td>
</tr>
<tr>
<td>Water heater</td>
<td>32.9%</td>
</tr>
<tr>
<td>Insulation (duct sealing, air sealing, window replacement)</td>
<td>29.6%</td>
</tr>
<tr>
<td>Heat pumps</td>
<td>16.0%</td>
</tr>
<tr>
<td>Ductless heat pumps</td>
<td>15.4%</td>
</tr>
<tr>
<td>Other</td>
<td>8.2%</td>
</tr>
<tr>
<td>EV charger</td>
<td>7.3%</td>
</tr>
</tbody>
</table>
Perceived Energy Efficiency Savings

- 0% - 20% - 48.8%
- 20% - 40% - 12.1%
- 40% - 60% - 2.4%
- over 60% - 1.1%
- I do not know - 35.6%

OPALCO Member Survey 2018
House Heated with Non-Electric Source

41.7% No
58.3% Yes

OPALCO Member Survey 2018
Would Consider a HI Ductless Heat Pump

41.7% No
58.3% Yes

OPALCO Member Survey 2018
Own an Electric Vehicle

- 7.2% Yes
- 26.5% No, but plan to purchase within 5 years
- 66.3% No, and do not plan to purchase within 5 years

OPALCO Member Survey 2018
Why Don’t You Use Rebates?

bought energy home or aware
familiar pump member live
eligible house heat

OPALCO Member Survey 2018
Members Said About Efficiency...

- Already doing everything they can – don’t see much potential for additional efficiency gains.

- Concern that the rate structure provides little incentive towards conservation and efficiency with the increase in facilities charge.
Renewable Energy Programs
Satisfaction with Renewable Energy Programs

- 36.8% Neutral
- 37.7% Satisfied
- 17.4% Very Satisfied
- 1.3% Very Dissatisfied
- 3.2% Dissatisfied
- 3.6% Not Applicable

55.1% Total for Satisfied & Very Satisfied

OPALCO Member Survey 2018
Ready to Participate in Solar Project

- 50.0% Now is not a good time, but I'm interested in future projects
- 13.8% I am already signed up for the Decatur Project!
- 11.9% I'm only interested in rooftop solar
- 5.9% I'd like to sign up now at www.opalco.com/solar!
- 18.5% Not interested
Rock Island
Key takeaways

• Very high satisfaction with Rock Island internet service

• Dissatisfaction with Rock Island customer service.

• Much of Rock Island dissatisfaction comes from members who say they have paid for it but are not yet able to receive services.

Lingering misperception correlating rate increases with startup funding.
Internet from Rock Island

49.7% No
50.3% Yes

OPALCO Member Survey 2018
Satisfaction with Internet in 2014*

*In 2014, this question was not specific to Rock Island

OPALCO Member Survey 2018
2018 Higher Satisfaction with Rock Island

Satisfaction of members using Rock Island is 38% higher than general satisfaction with Internet service in 2014.

70% Total for Satisfied & Very Satisfied

OPALCO Member Survey 2018
Satisfaction with Rock Island internet

1 = Very dissatisfied
5 = Very satisfied

OPALCO Member Survey 2018
What would make it worth switching to Rock Island?
Interested in upgrading to fiber?

OPALCO Member Survey 2018
How much would you be willing to pay to upgrade to fiber?

OPALCO Member Survey 2018
Overall: Ideas for Improvement

- Research sending outage alerts via text
- Provide after-the-fact info about why outages happened and how they were handled
- “We Love Our Linemen” campaign
- Request more onsite training for third party call center
- Update the Rates Calculator page to communicate how rates are impacted by things out of OPALCO’s control, and/or how OPALCO works to negotiate with companies like BPA for lower rates for members
Thank you
Appendix

● **Survey Questions**