

Community-Wide Clean Energy Program Residential Customer Survey Findings

Presented at OPUC Workshop on March 1, 2021
Survey conducted in Fall 2020
PGE Market Insights



Research objectives and methodology

A community-wide clean energy product aims to deliver a community-wide clean energy solution designed in partnership with municipalities and key stakeholders, to meet their goals of being 100% clean, while maintaining the benefits of the integrated utility system (system-wide reliability, affordability, fairness).

Research Objectives

- Identify the premium PGE residential customers are willing to pay to accelerate their city's / county's transition to 100% clean energy by 2030 / 2035.
- Estimate participation rates across a range of price premiums in a scenario where all customers are defaulted to the new 100% renewable rate.
- Understand what program benefits resonate most strongly with PGE customers.

Survey Methodology

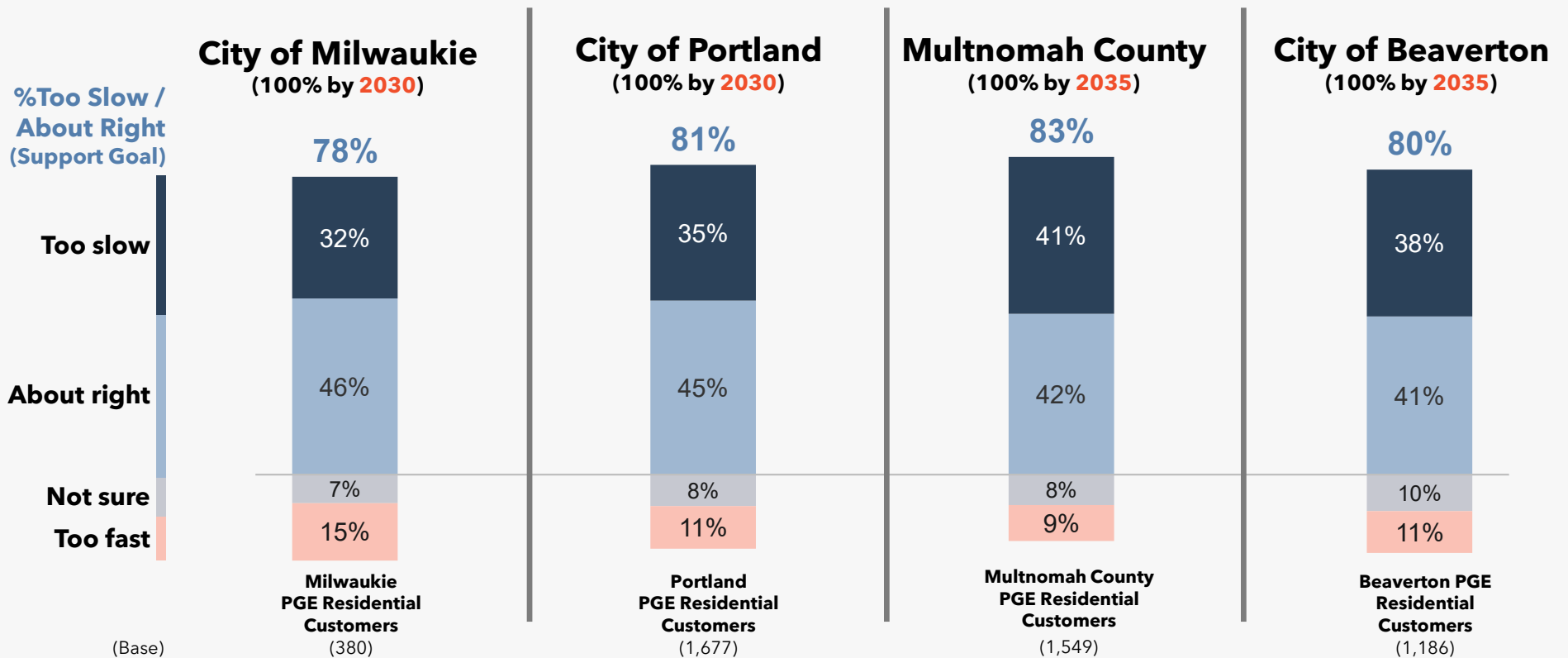
- Web survey averaging ~12 minutes in length conducted among PGE residential customers in selected geographies (n=4,792 in total):
 - **Milwaukie** (n=380)
 - **Portland** (n=1,677)
 - **Multnomah County** (n=1,549)
 - **Beaverton** (n=1,186)

Note: The survey respondent's "city" is based on the "Tax City" designation in PGE's customer database.

Support for city / county clean energy goals

SURVEY WORDING: Do you think [Location's] goal of everyone in the [city/county] being served with 100% clean and renewable electricity by [2030/2035] is too fast, too slow, or about right?

[note: this question was asked after respondents were presented with various clean transition cost scenarios]

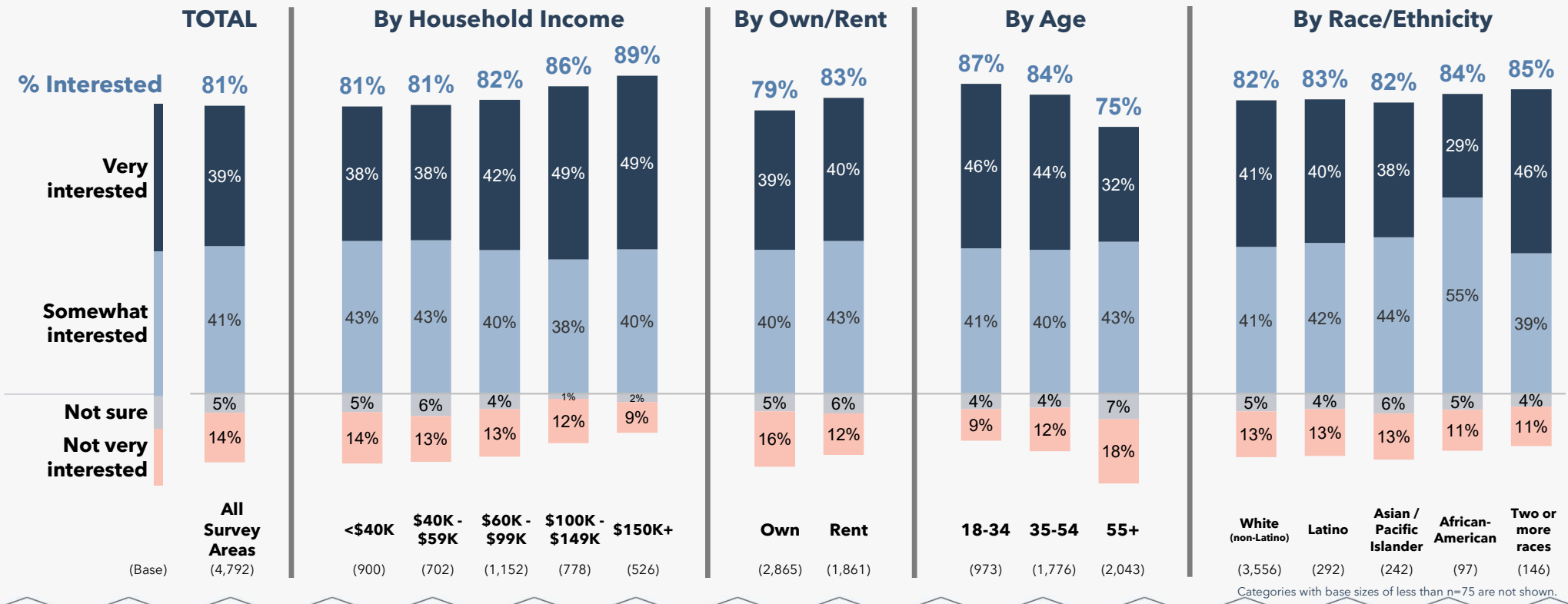


Source: 2020 PGE Community-Wide Clean Energy Program Residential Customer Survey

Interest in PGE community-wide clean energy concept

SURVEY WORDING: PGE is exploring potential new clean and renewable energy solutions that would enable [LOCATION] to achieve its goal of everyone in the [city/county] being served with 100% clean and renewable electricity by [2030/2035], while ensuring that electricity remains reliable, affordable and fair for all customers, with independent third-party oversight.

While the full details about how this [citywide/countywide] clean and renewable energy solution would work and how it would affect your home's monthly electricity bill will clearly matter, based on this information alone, how interested would you be in participating to help [LOCATION] achieve its clean energy goals?

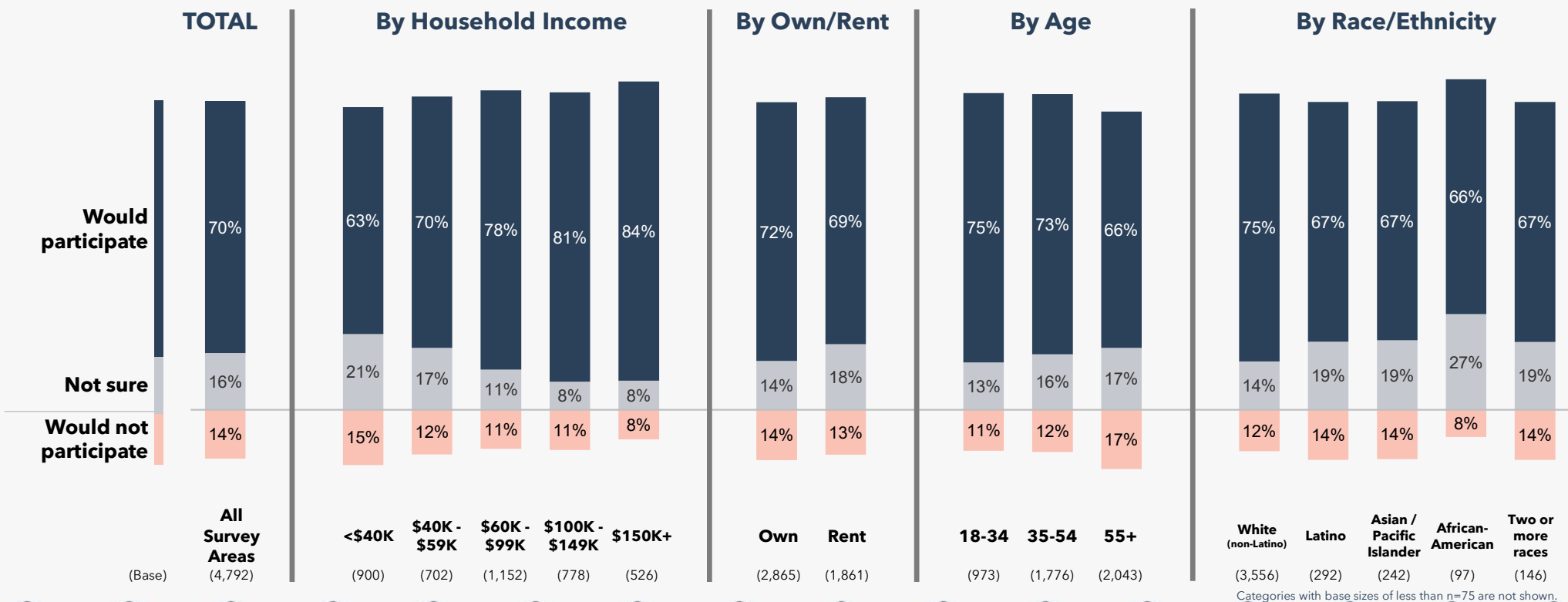


Source: 2020 PGE Community-Wide Clean Energy Program Residential Customer Survey

Categories with base sizes of less than n=75 are not shown.

Participation rates if PGE customers are defaulted to community-wide program at a 5% bill premium

SURVEY WORDING: If everyone in [LOCATION] were to be enrolled in this program to enable [LOCATION]'s goal of everyone in the [city/county] being served with 100% clean and renewable electricity by [2030/2035], and it increased your home's electric bill by \$[5% of Avg Bill] per month, would you remain in this program, or would you opt out of this program and return to basic service and your average monthly bill of \$[Avg Bill]?



Source: 2020 PGE Community-Wide Clean Energy Program Residential Customer Survey

Categories with base sizes of less than n=75 are not shown.

Relative importance of benefits when considering whether or not to participate in clean energy program

What is most important in deciding whether or not to participate in a new resource and pricing plan that would enable [city/county] to achieve its goal of everyone in the [city/county] being served with 100% clean and renewable electricity by [2030/2035]?

	Relative Importance Index (average = 100)			
	City of Milwaukie (100% by 2030)	City of Portland (100% by 2030)	City of Beaverton (100% by 2035)	Multnomah County (100% by 2035)
It will help protect the environment for future generations.	148	161	157	159
It will be available to all residents and small businesses located in [LOCATION], including low and fixed-income residents.	152	151	146	148
It will reduce greenhouse gas emissions.	112	127	121	124
It will increase the use of clean and renewable energy in the Pacific Northwest.	110	117	117	116
By funding new renewable energy projects in the region, it will help contribute to a more secure energy future for [LOCATION] and the rest of Oregon.	110	110	110	111
It will ensure that all of the energy that powers your home is 100% clean and renewable.	95	104	106	103
It will create more local jobs in the clean energy industry.	99	87	87	89
It will provide a way for you to use more clean and renewable energy without installing solar panels on your roof or property.	75	63	74	67
Some of the energy that supports the program will be from new renewable energy generation facilities located in [LOCATION].	59	47	50	50
There will be some clean and renewable generation resources that will be owned by members of my community.	39	32	32	33