CAC Item C7
Staff Report Item 19

To:	Ava Community Energy Authority
From:	Annie Henderson, Chief Customer Officer
Subject:	Informational report on general customer survey and commercial customer survey results
Date:	October 21, 2026

Summary

Staff conducted two customers surveys. The first was an on-line survey of more than 550 residents of Alameda and San Joaquin Counties. The second survey was conducted by an Oakland firm, EMC Research, that performed online and telephone surveys of 192 commercial customers of Ava Community Energy. This report and presentation shared the results of the two surveys.

Financial Impact

Staff used AYTM for the general public survey at a cost of less than $3,000, including respondent incentives. The cost of the EMC Research commercial customer survey is approximately $30,000. Both costs were included as part of the approved budget for this fiscal year. This item requests no additional expenditure or Board action.

Analysis and Context

General Customer Online Survey

Ava has surveyed customers in several formats since before the start of service in 2018. Earlier surveys examined awareness of Ava, interest in electrification, service preferences and communications. The current surveys added questions asking respondents to rank electricity provider qualities, allocate 100 points among possible uses of surplus revenue, and choose one use if only one could be funded. These responses provide one input to staff and Board deliberations; they are not a representative vote on a specific budget proposal.

Methodology

Staff developed and fielded the survey on AYTM and used zip codes to screen responses. The presentation reports 600 completed surveys: 407 from Alameda County, 150 from San Joaquin County and 43 from Contra Costa or Santa Clara County. The 43 outside-county responses were excluded, leaving 557 responses from the two counties (approximately 73% Alameda County and 27% San Joaquin County). For comparison, the count of customer accounts are approximately 77% Alameda County and 23% San Joaquin County.

Results

When respondents ranked six qualities of an electricity provider, 39% placed low rates first and 30% placed reliable electricity service first. Programs and incentives (9%), renewable electricity (9%), community grants (7%) and public agency status (6%) followed. An appendix slide reports that 77% put low rates and 71% put reliability in their top three; the corresponding figure for programs was 47%.

When distributing 100 points among six possible uses of surplus revenue, respondents assigned an average of 24.92 points to ongoing savings through lower rates. Renewable energy received 16.88 points, customer programs 16.75, a one-time bill credit 15.37, rate stability 14.22 and other carbon-free energy 11.87. The average points reflect relative preference across the listed options, not dollar allocations.

When required to pick a single use, 224 of 557 respondents (40%) chose lower rates. Renewable energy received 97 selections (17%), programs 66 (12%), a bill credit 64 (11%), rate stability 63 (11%) and other carbon-free energy 43 (8%).

Taken together, the answers place affordability first, especially ongoing lower rates. Respondents also value reliability, although electric distribution service is principally PG&E’s responsibility. Interest in renewable energy and programs is meaningful even though those options were selected less often than lower rates. The survey questions did not provide respondents with Ava’s current power mix, which limits how the renewable and carbon-free choices can be interpreted, but does indicate that customers value our carbonfree 2030 goal.

Commercial Customer Survey

Methodology
Commercial customers account for more than 60% of Ava's electricity load. Ava retained Oakland-based EMC Research for a more direct survey of known commercial accounts and people responsible for energy decisions. EMC used a mixed approach of online surveys and telephone interviews lasting approximately 12 to 15 minutes. The completed interview count is 192 surveys.

Results
Commercial customers valued lower rates (48%) and Reliability (26%) as the most important qualities in an electricity provider. The top choice for application of surplus revenue was to lower rates, followed by bill credits.

Main Takeaways from the Customer Surveys

Low rates are a clear priority across all survey responses for residential and customers.

Customers care about reliability, though Ava has little to no control in this area.

Residential customers consistently ranked programs third in level of importance and funding.

There was a persistent interest in renewable energy from residential customers.

Attachments

A. Customer Surveys Results Presentation

Attachment Staff Report Item 19A

Ava Community Energy

Customer Survey Results

October 21, 2026

Introduction

Purpose

- This is an informational report to the Board of Directors regarding recent survey results from polling of local residents and Ava Community Energy commercial customers.
- No action is requested.

Agenda

- Background
- General Public
  - Methodology for General Public Survey
  - General Public Survey Results
- Commercial Customers
  - Methodology for Commercial Customer Survey
  - Commercial Customer Survey Results
- Summary & Conclusion

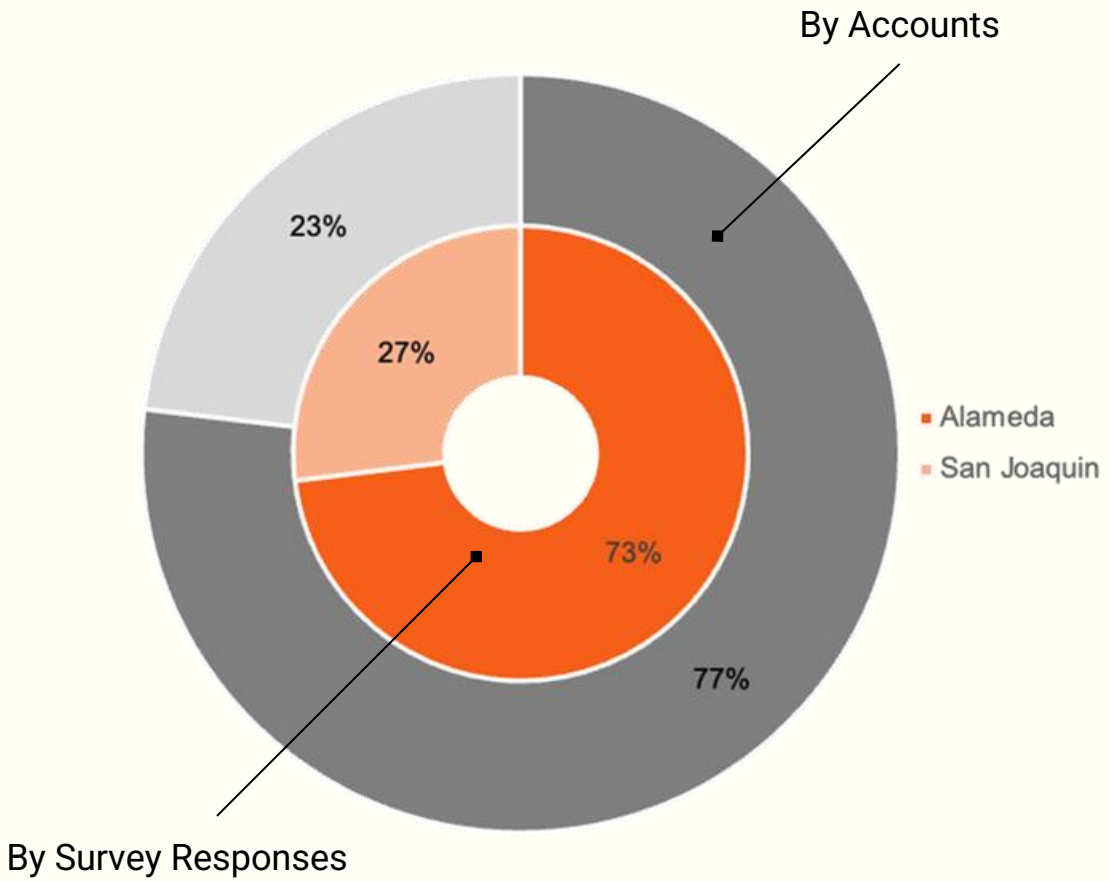
Background

- We have surveyed customers since prior to start of service in 2018 and used different formats over time
- In the most recent survey, we asked similar questions to prior surveys and further specifically asked customers to:
  - stack rank choices for the level of importance of utility service characteristics
  - assign value to various applications of surplus revenue
  - make a single selection for application of surplus revenue
- Additionally, we created a higher-touch survey focused on commercial customers specifically

General Public Survey

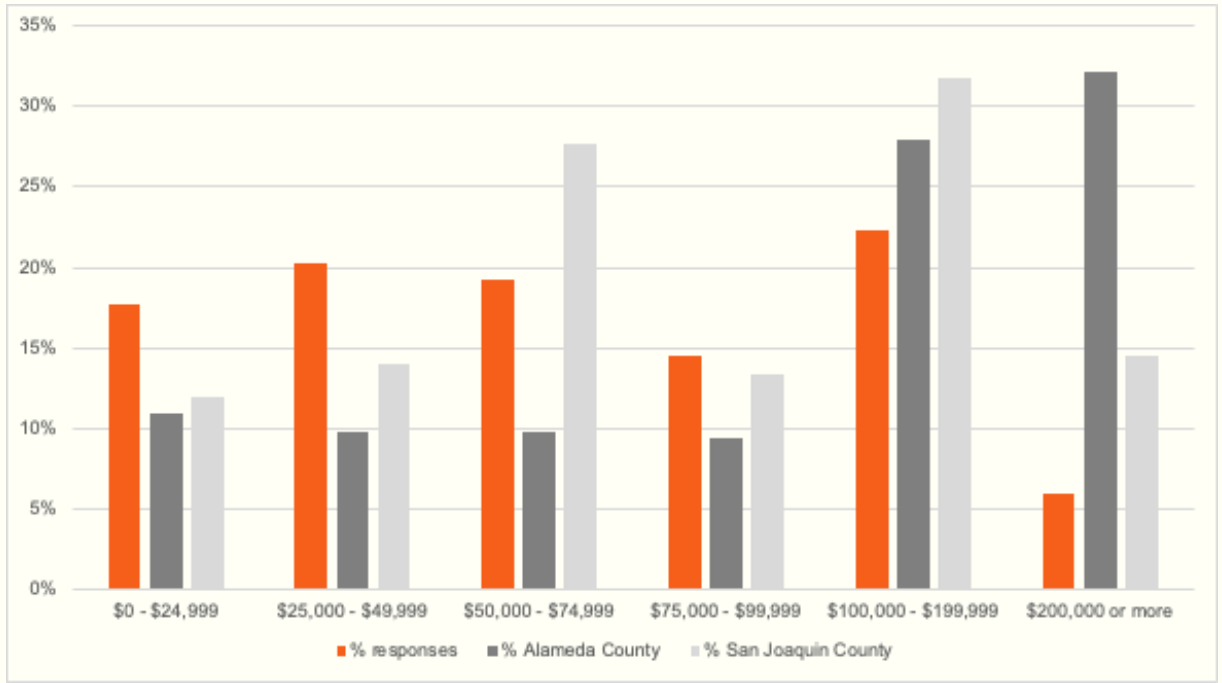
General Public Survey Methodology

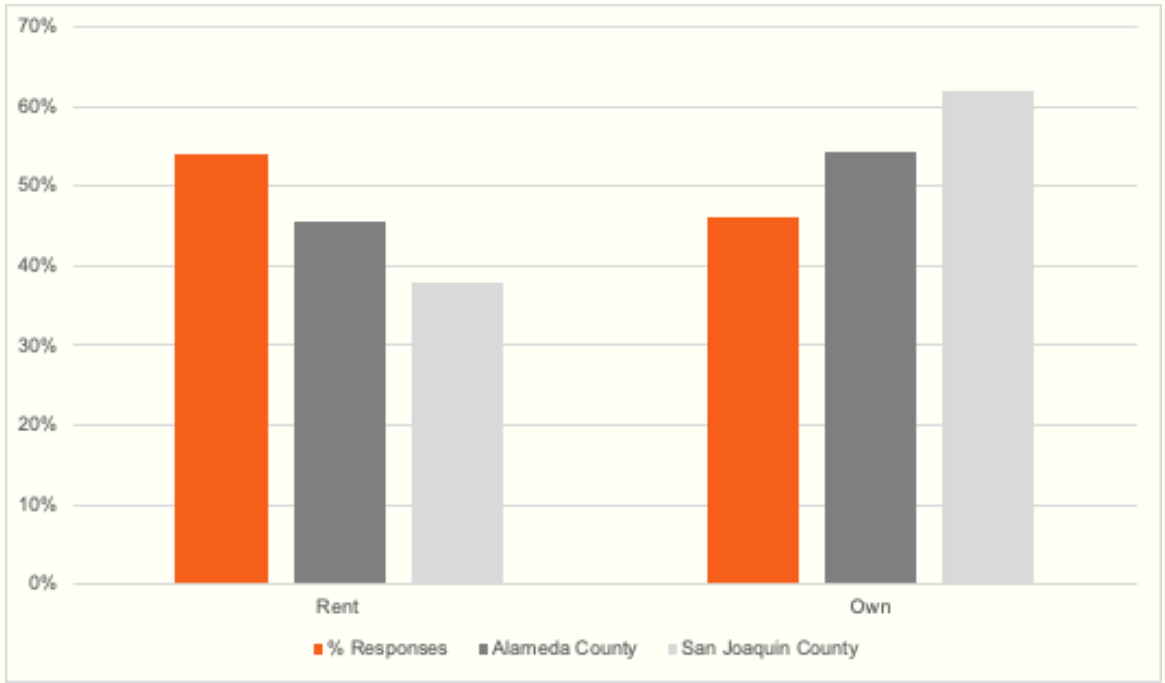
- Utilized an online platform called Ask Your Target Market (AYTM)
- Geofenced responses by zip code
- Actual personally identifiable data not included, possible that a survey could be completed by an individual who opted out of Ava Community Energy service
- Following results based on **557 surveys** from Alameda and San Joaquin County
  - 407 Alameda County /150 San Joaquin County
  - Compared survey results to Ava service territory



Survey Demographics

- **Alignment**: Survey responses generally track to local demographic distribution for geography, race, and age
- **Over Sample:** Larger representation of lower income population and renters compared to local demographics





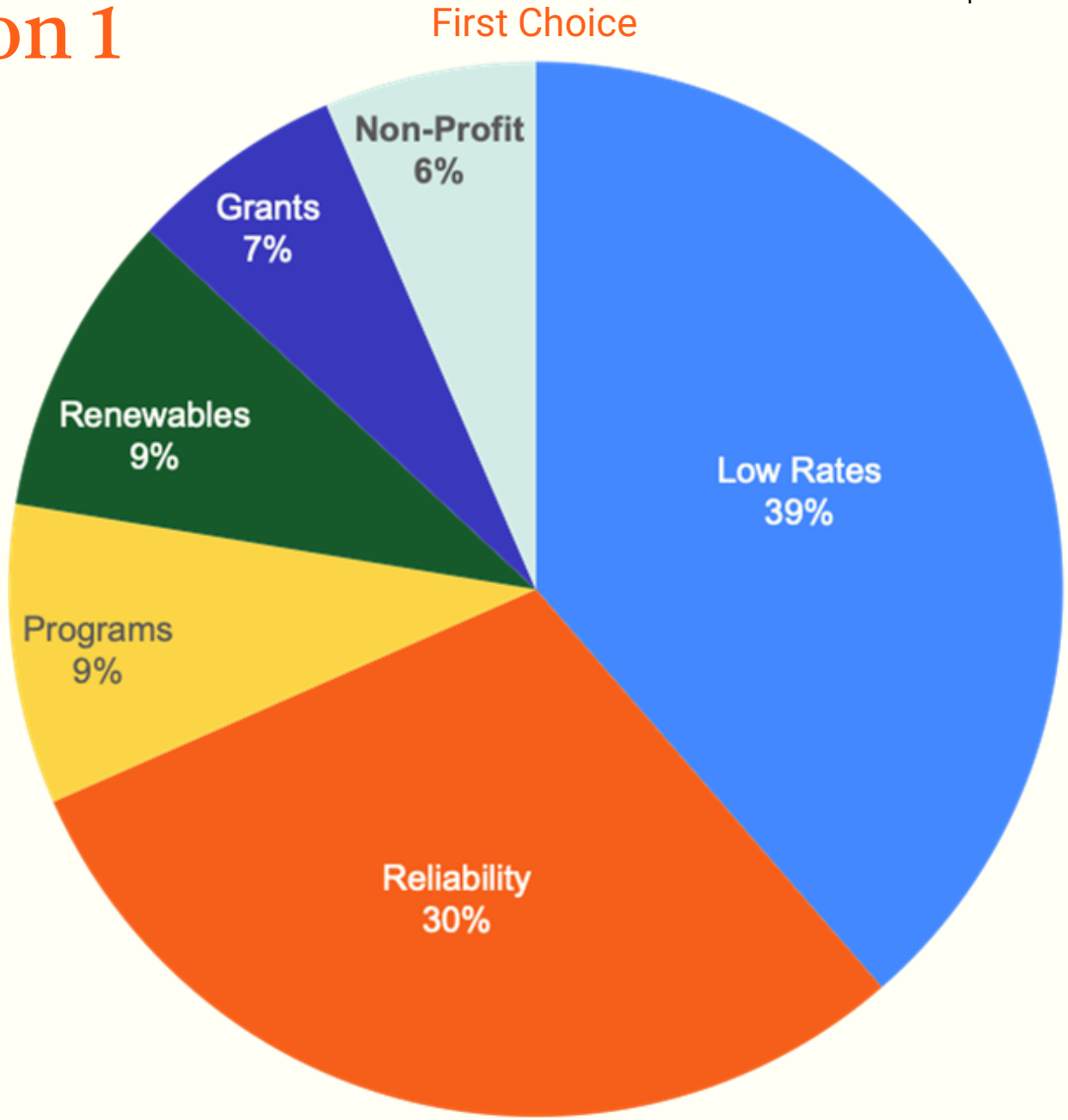
*2024 county-level income and housing data from https://datausa.io/

General Public Question 1

In terms of your electricity provider, how important are the following qualities?

[stack rank following options]

- **Low rates**
- **Reliable** electricity service
- Electricity comes from **renewable sources** like wind and solar power
- Offers energy-related **programs** and incentives
- Provides **grants** to the communities it serves
- Is a **public agency** (not a for-profit company)

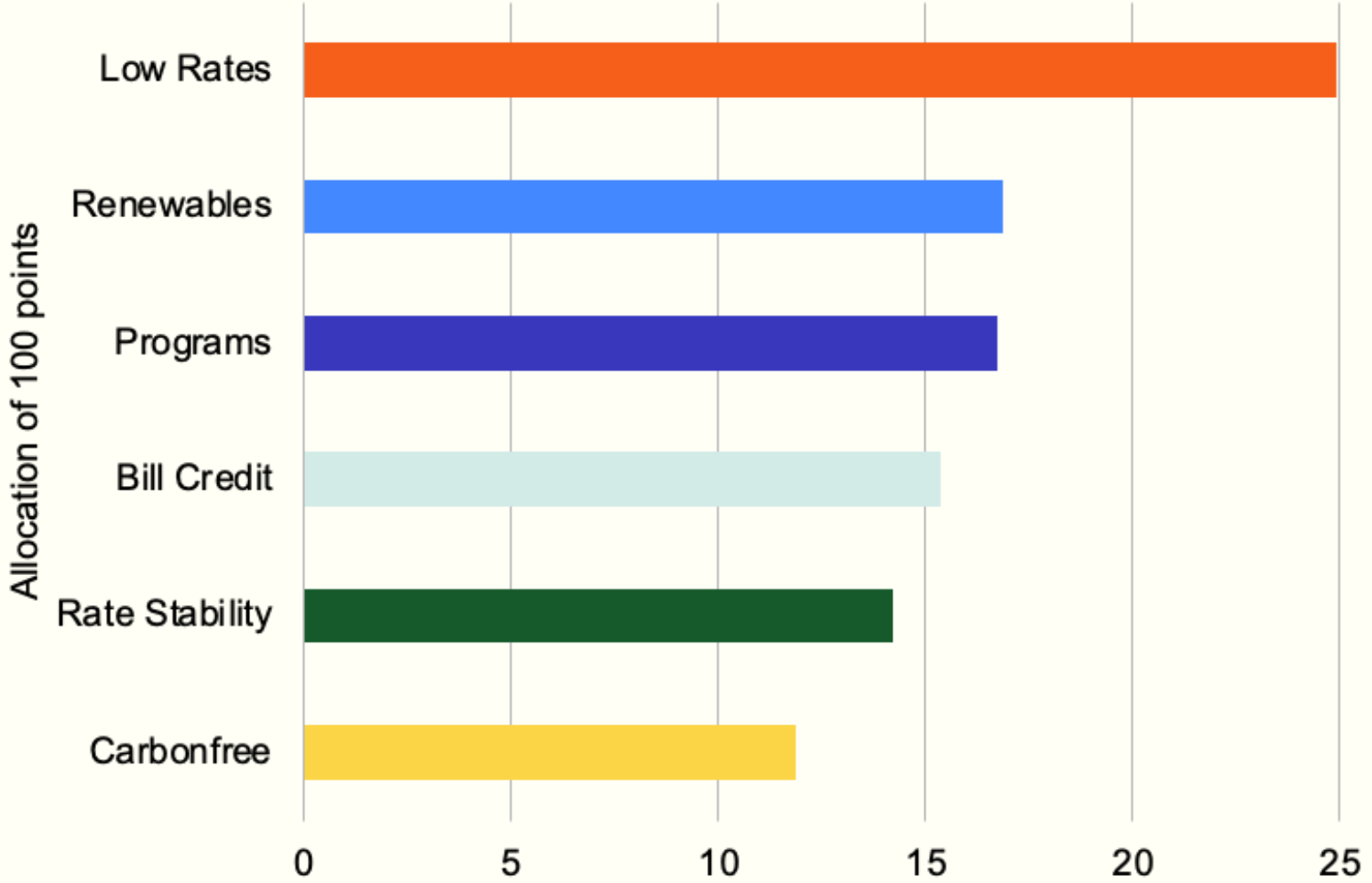


General Public Question 2

Revenue sometimes exceeds what is needed for operating costs. In your opinion, how should excess revenue be invested?

[assign 100 points across following options]

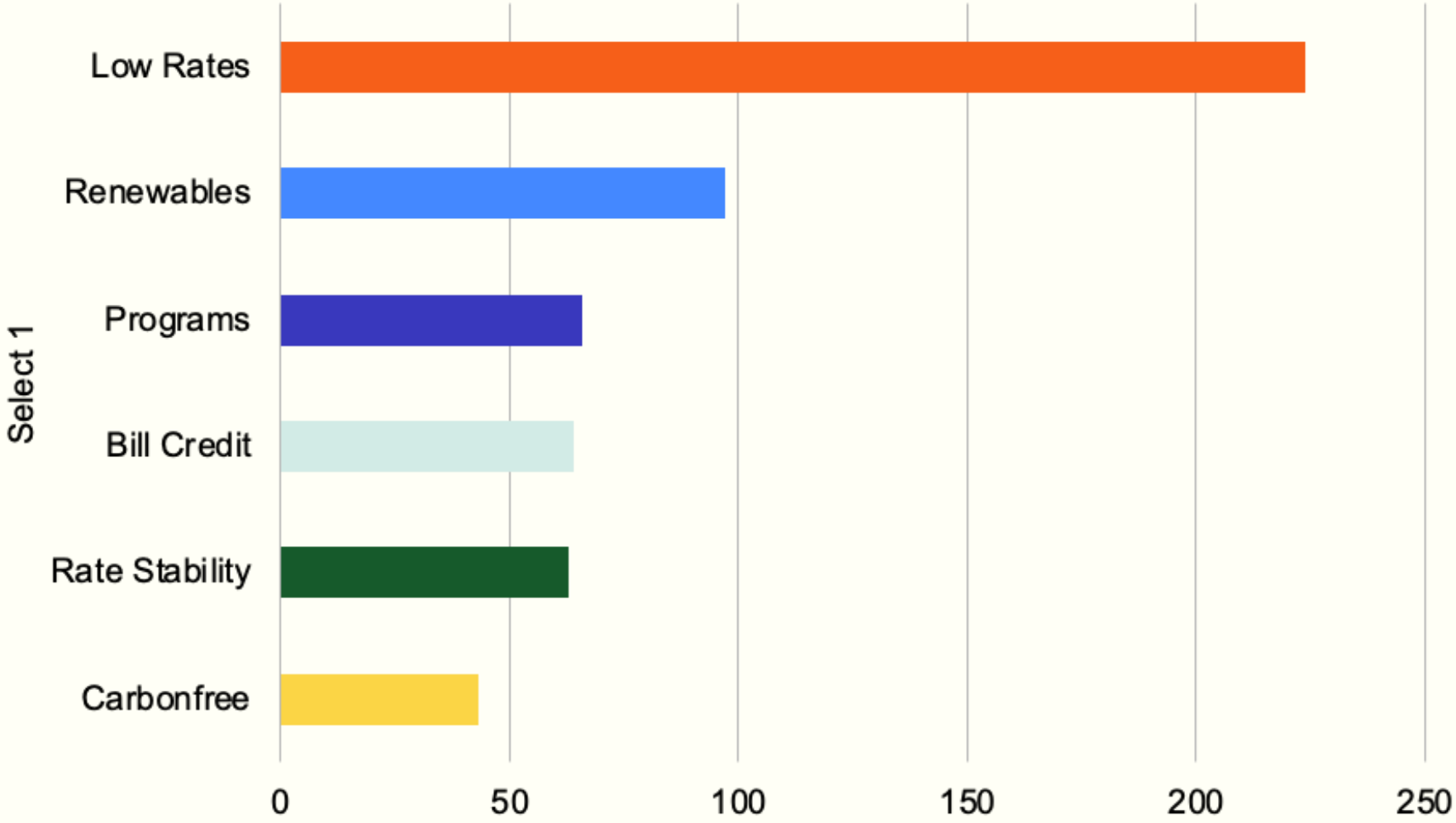
- Provide ongoing savings by **lowering rates**
- Provide **more renewable energy**, like solar and wind
- Provide more customer **programs**, like rebates and incentives
- Provide one-time bill savings with a **credit**
- Increase predictability by keeping **rates stable** year over year
- Provide **more carbonfree energy**, like nuclear and hydro



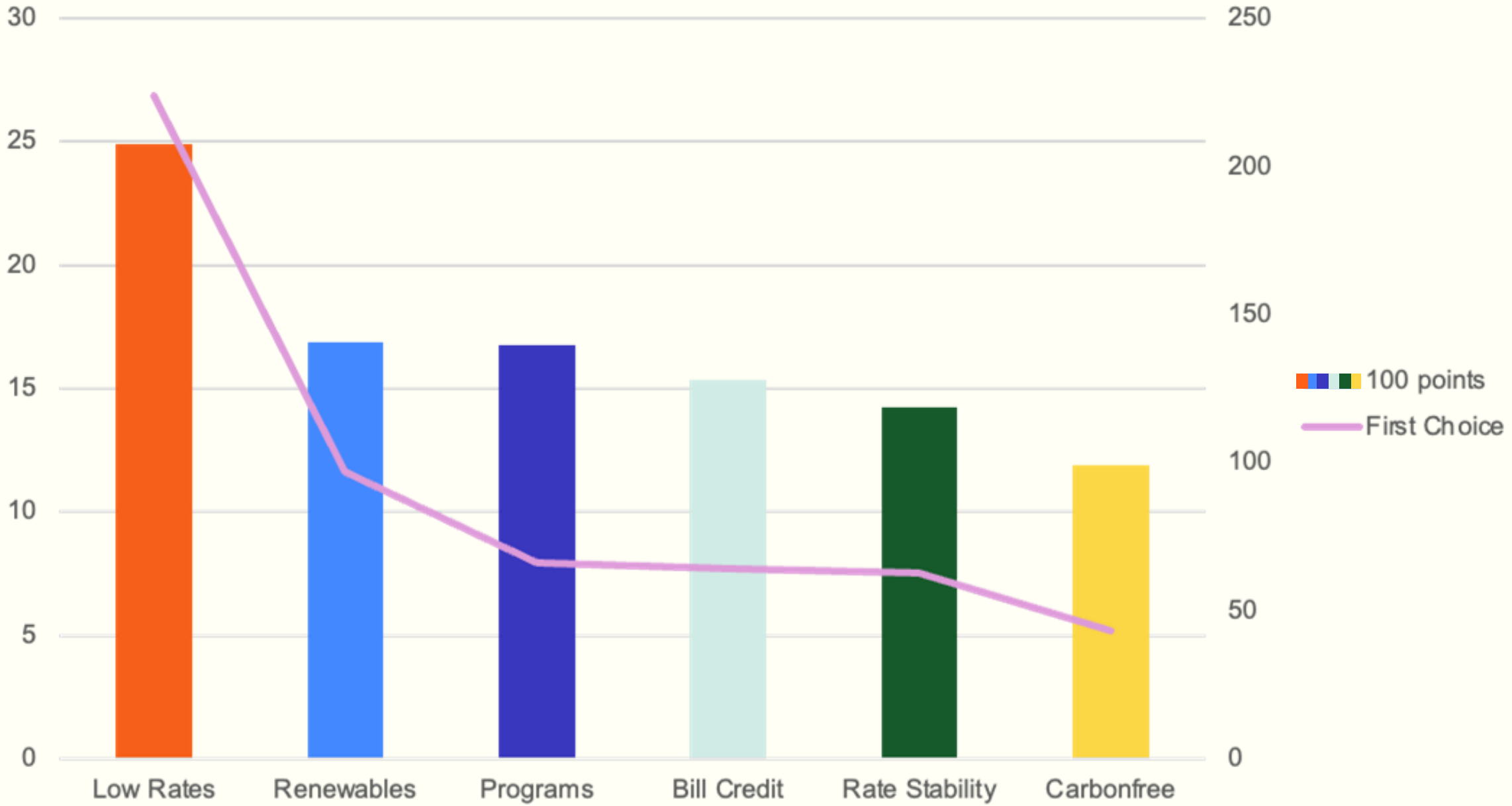
General Public Question 3

Pick only one if surplus revenue available

If only one option can be funded, which would you choose?



Surplus Revenue Results - Combination of Q2 and Q3

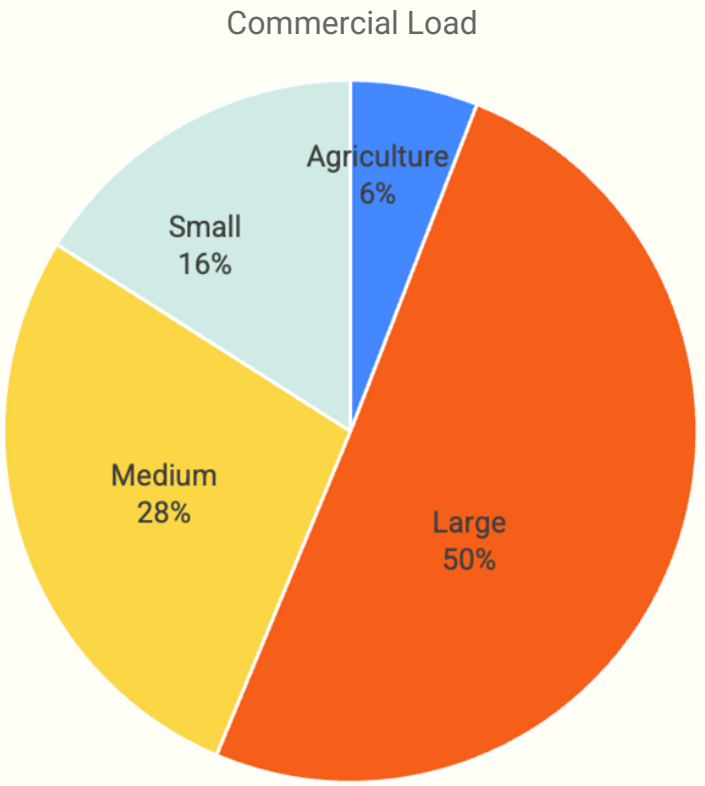


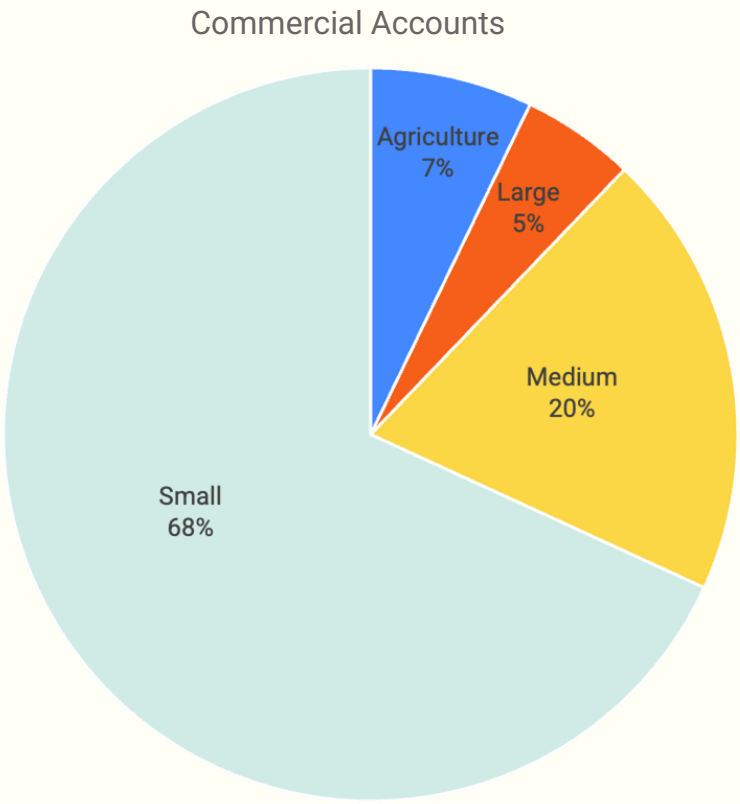
Commercial Customer Survey

Commercial Customer Survey Methodology

- Commercial customer load represents 62% of total load served
- In order to better represent the needs and priorities of these customers, we had to take a more hands-on approach to surveying
- Through EMC Research, a market research firm located in Oakland, we targeted known commercial accounts and individuals responsible for energy-related decisions
- Completed **192 surveys**

Ava Customers





Commercial Customer Survey Demographic Results

Completed survey demographics reflect our commercial customer distribution by size, type, and geography.

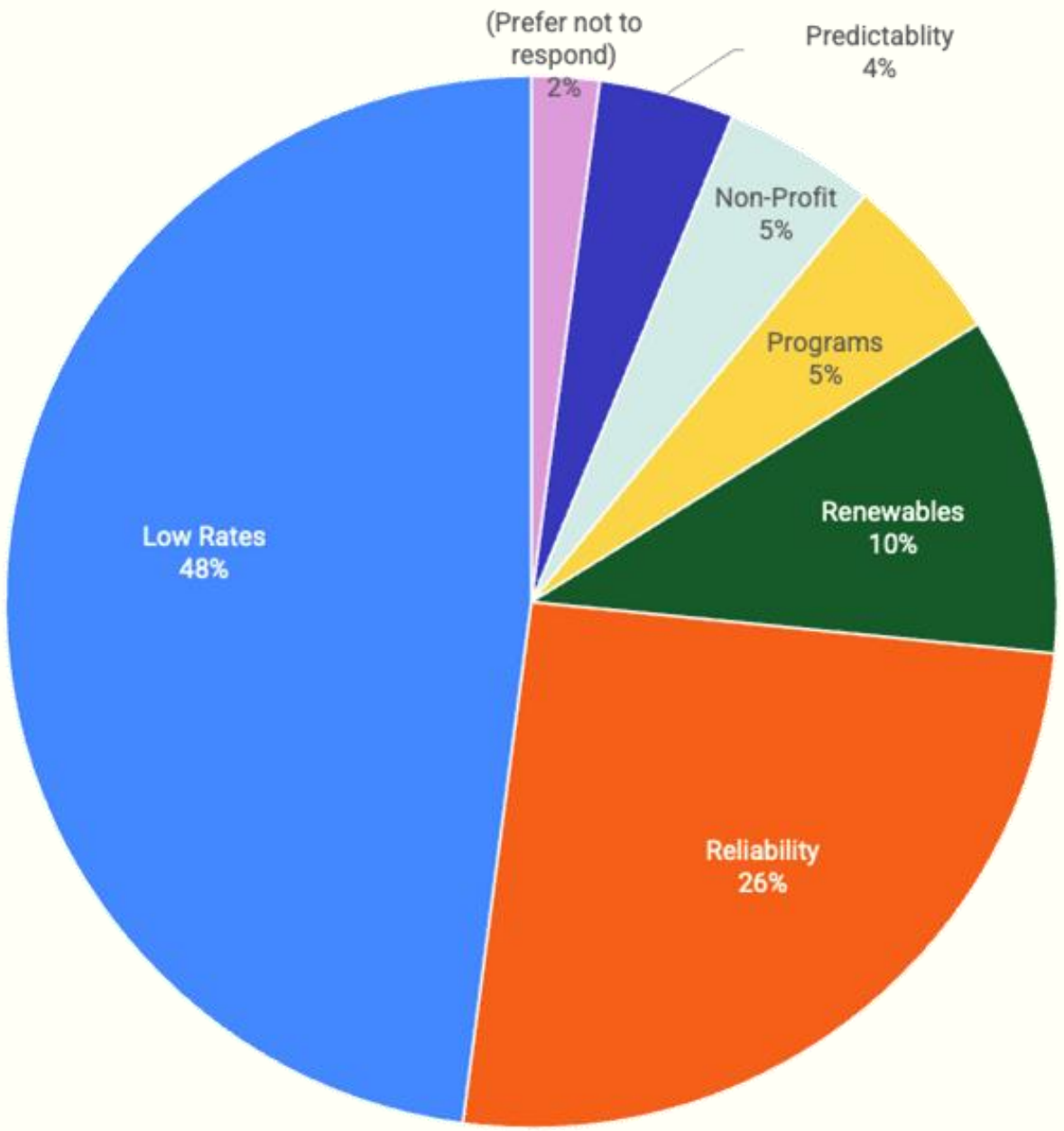
Size Based on Load	**Total**	**Distribution by # Ava Accounts** *(reference)*
Large	**16 (8%)**	5%
Medium	**41 (21%)**	20%
Small	**120 (63%)**	68%
Agriculture	**15 (8%)**	7%
Total	**192 (100%)**	

Commercial Question 1

In terms of your electricity provider, how important are the following qualities?

Users had to select one most important quality

- Offers **low rates**
- Offers **predictable bills** month to month
- Provides **reliable** electricity service
- Provides electricity from **renewable sources** such as wind and solar power
- Is a **public agency** (not a for-profit company)
- Offers energy-related **programs and incentives** for businesses

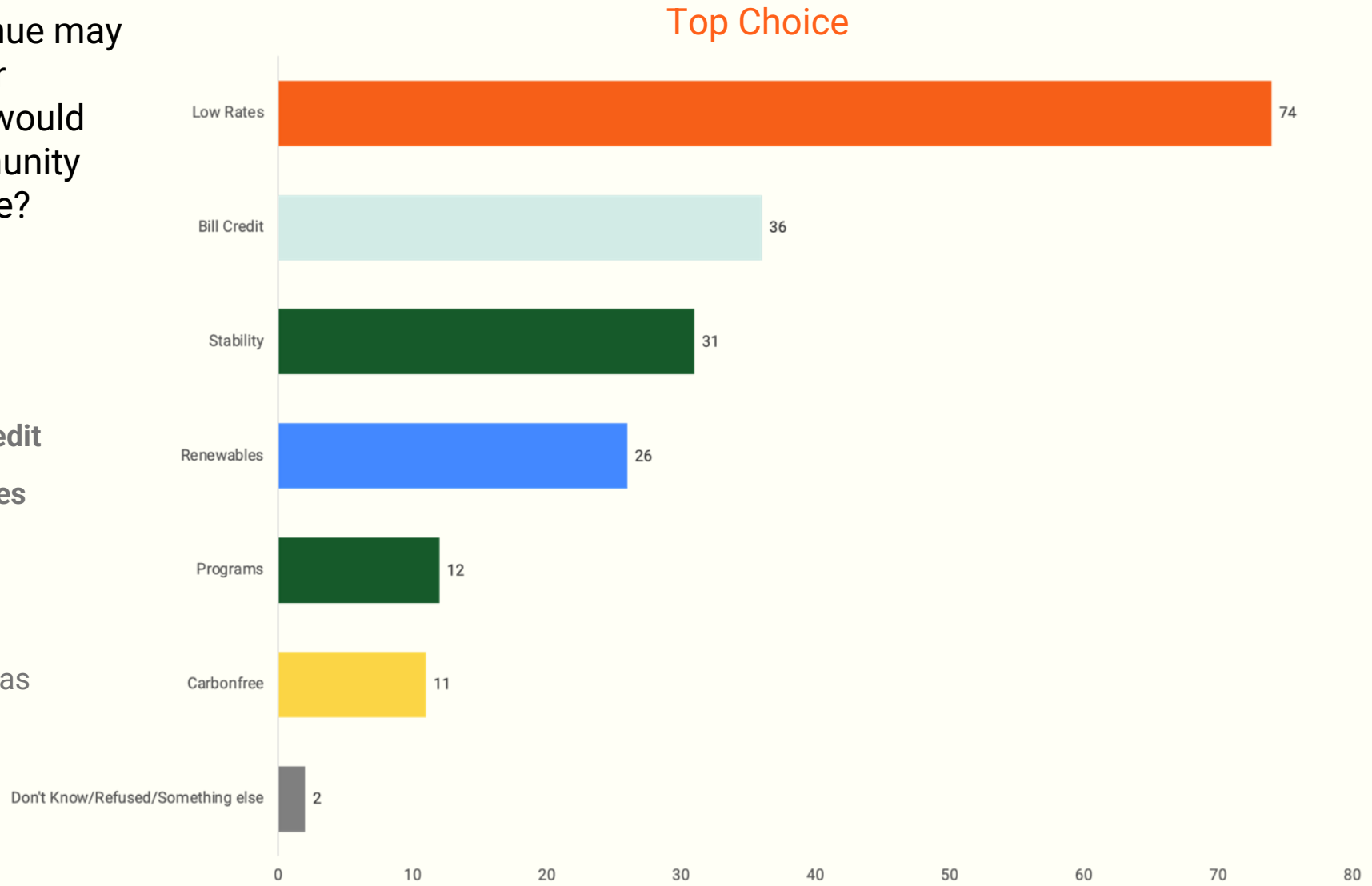


Commercial Question 2

As a not-for-profit agency, Ava's revenue may sometimes exceed what is needed for operations. In an event like this, how would your business most prefer Ava Community Energy to allocate that excess revenue?

[Users had to identify their top selection]

- Provide a one-time bill savings with a **credit**
- Provide ongoing savings by lowering **rates**
- Increase predictability by avoiding rate increases and keeping rates **stable year over year**
- Provide more customer **programs**, such as additional rebates and incentives
- Invest in more **renewable energy**, increasing use of solar and wind power
- Provide access to new sources of **carbonfree energy**, like nuclear and hydroelectric power



Summary & Conclusion

Most Important Quality for Electricity Provider

	Residential/ General Public	Commercial
First	Low Rates (39%)	Low Rates (48%)
Second	Reliability (30%)	Reliability (26%)
Third	Renewables (9%) (tie)	Renewables (10%)
Fourth	Programs (9%) (tie)	Programs (5%) (tie)
Fifth	Grants (7%)	Non-Profit (5%) (tie)
Sixth	Non-Profit (6%)	Rate Stability (4%)

Top Choice for Surplus Allocation

Residential/ General Public	Commercial
Low Rates (40%)	Low Rates (39%)
Renewables (17%)	Bill Credit (19%)
Programs (12%) (tie)	Rate Stability (16%)
Rate Stability (12%) (tie)	Renewables (14%)
Bill Credit (11%)	Programs (6%) (tie)
Carbonfree (8%)	Carbonfree (6%) (tie)

Conclusion

- Staff is providing this as information for the Board, **no action requested**
- As part of our regular on-going work, Staff captures **customer feedback and general sentiment** through event interaction summaries, call center notes, social media listening, customer satisfaction surveys, program surveys, and awareness surveys. This information **informs operational decisions** around marketing messages, program design, and other aspects of our day-to-day work.
- This report is part of our effort to **share important context and insights on our customers with the Board** to better inform future Board discussions