



Nebraska Public Power District

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Reputation Research Study June 2023



Key Findings

- NPPD's relationship with stakeholders and customers remains very strong.
- Both commercial and retail customers rate trust higher than last year.
- Scores for wholesale GMs remain lower than other stakeholders but...
- ...dramatic improvement with rural wholesale GMs.
- The degree to which the NPPD bill is a financial strain negatively impacts NPPD scores.
- Service delivery remains the most important driver of customer scores.
- About 90% of stakeholders rate NPPD extremely high across most Service Attributes.
- About 80%-90% of your customers rate NPPD high on environmental criteria.
- NPPD is viewed as a responsible environmental steward.
- NPPD scores are higher than other utility scores in the Midwest.
- Your employees continue to be very highly engaged but the trendline is down slightly.



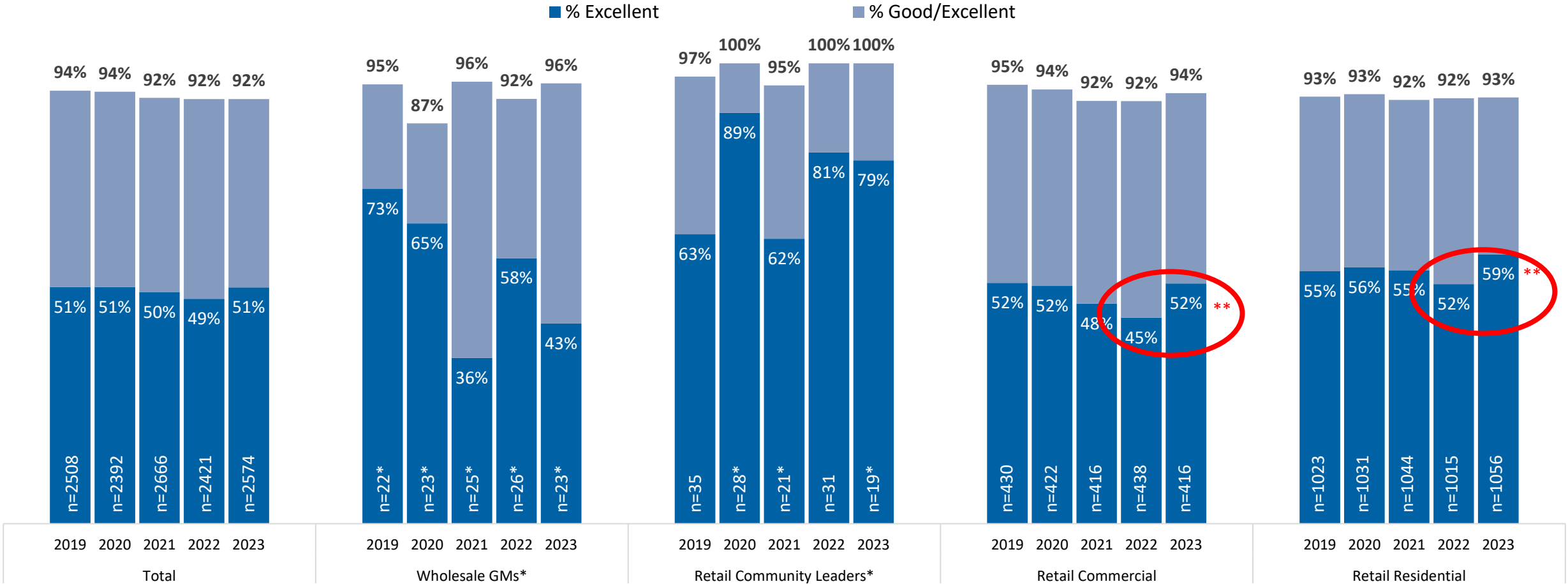
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**Reputation, Trust and
Satisfaction**

Perception of NPPD's reputation continues to remain positive. A significant increase in Top-Box scores among commercial and residential customers occurred in 2023.

NPPD REPUTATION



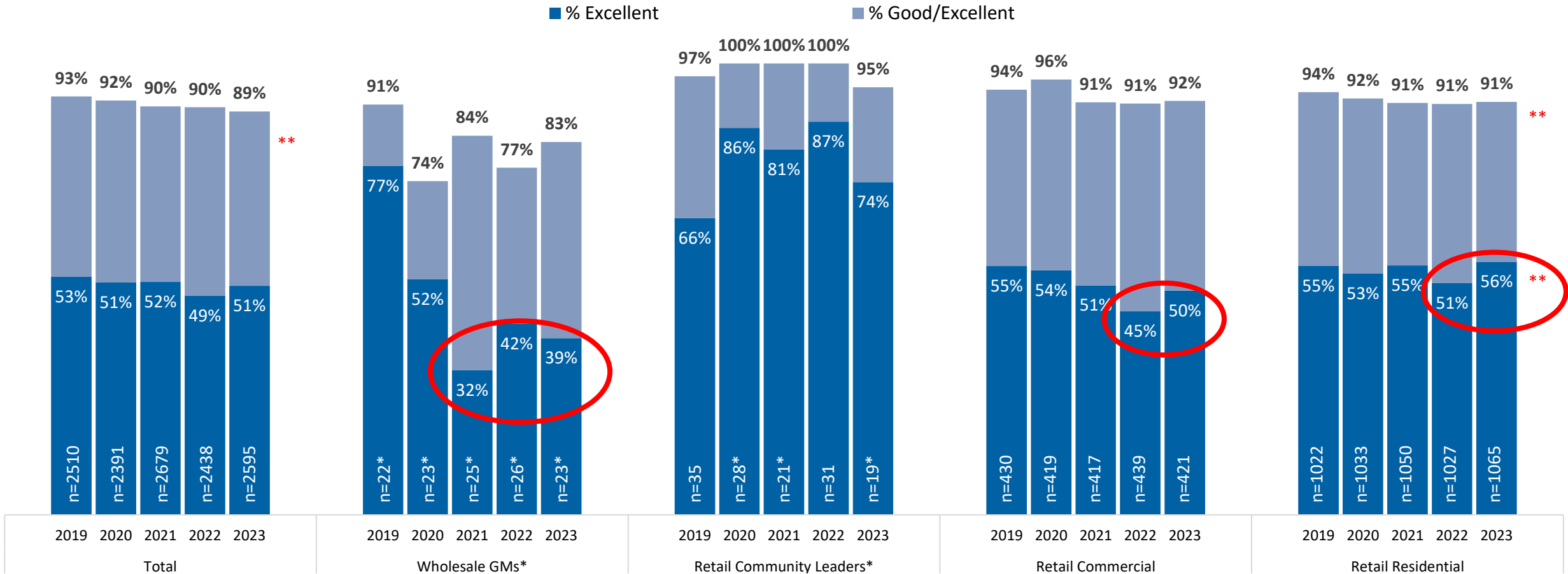
*Small sample sizes. View results with caution.

**Significant difference at the 95% confidence level in 2023 compared to 2022.

Q5A. Overall, how would you rate the reputation of Nebraska Public Power District?

Although based on a small sample size, Wholesale GM's tend to have lower trust levels compared to other customer groups.

LEVEL OF TRUST OF NPPD



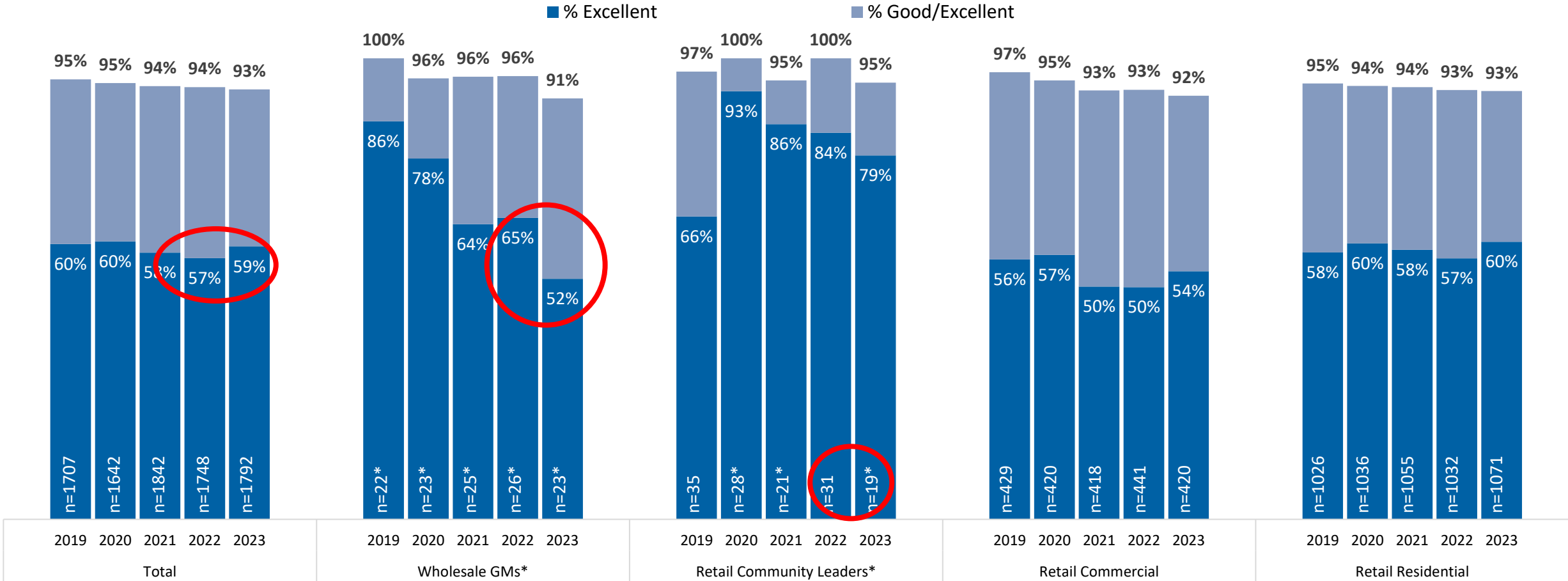
*Small sample sizes. View results with caution.

**Significant difference at the 95% confidence level in 2023 compared to 2022.

Q5B. How would you rate your level of trust of NPPD?

Overall satisfaction with NPPD has remained at a very high level across all groups since 2019, with at least nine out of ten customers giving “good” or “excellent” ratings.

OVERALL SATISFACTION WITH ELECTRICAL SERVICE PROVIDED BY NPPD



*Small sample sizes. View results with caution.
No significant differences at the 95% confidence level in 2023 compared to 2022.
Q5C. How would you rate your overall satisfaction with the electrical service that NPPD provides?



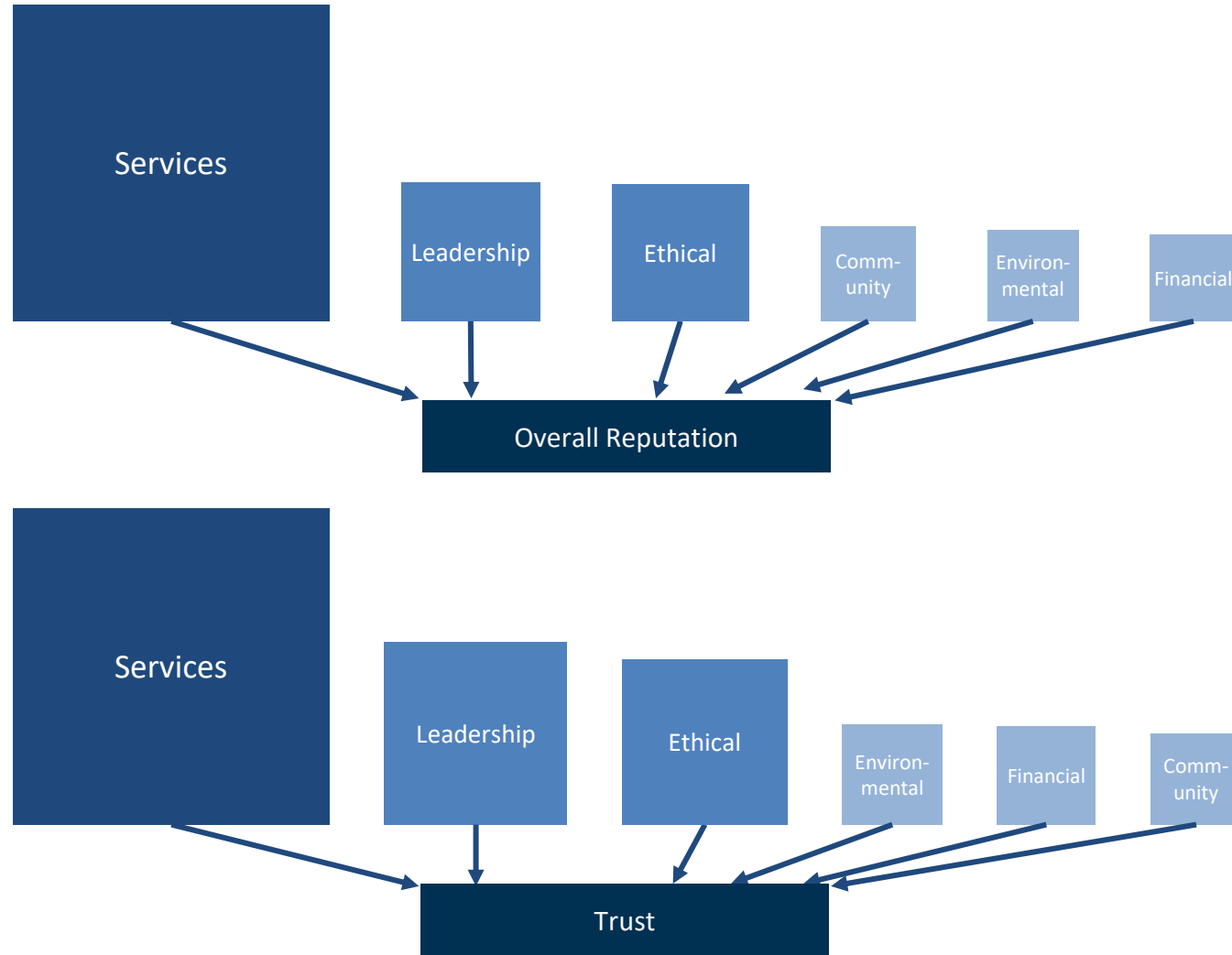
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Retail Residential Key Drivers

Key Driver Analysis (Retail Residential)

Service delivery remains the most important driver for both overall reputation and trust.



Results based on relative weights regression analysis. Area of each attribute is approximately equivalent to its impact as a driver.



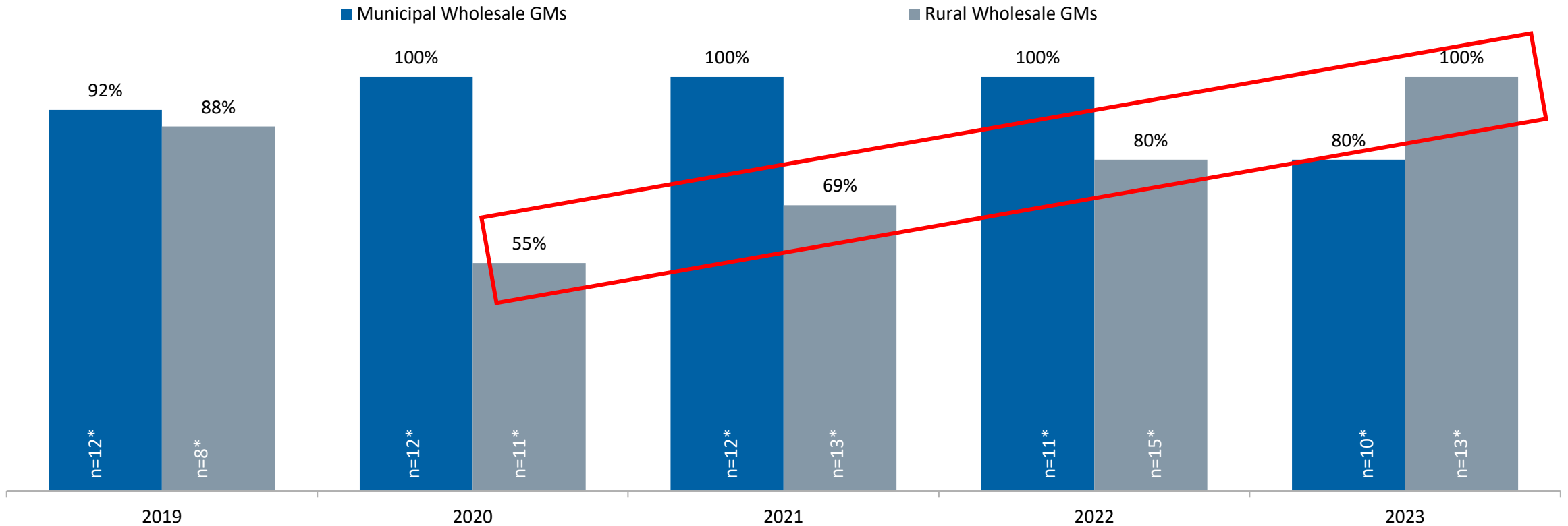
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Wholesale GMs Municipal vs. Rural

After Rural Wholesale GM's 30% drop in responding to customer needs in 2020, ratings have continued to increase the past three years.

RESPONDING TO CUSTOMER NEEDS (Top 2 Box)



*Small sample sizes. View results with caution.

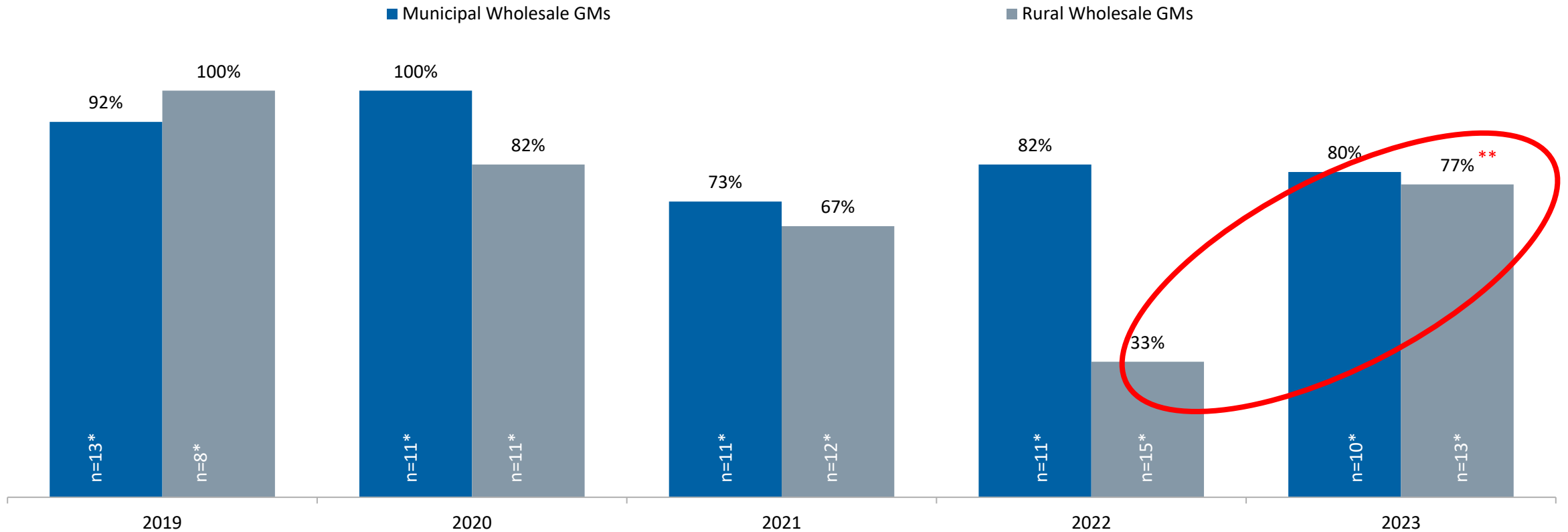
No significant differences at the 95% confidence level in 2023 compared to 2022.

Services Attribute

Q6C. Based on what you know about the electrical service that NPPD provides, please rate NPPD on the following: Responding to customer needs.

Rural Wholesale GMs ratings rebounded in 2023 for NPPD providing a clear vision of future energy services.

PROVIDING A CLEAR VISION OF FUTURE ENERGY SERVICES (Top 2 Box)



*Small sample sizes. View results with caution.

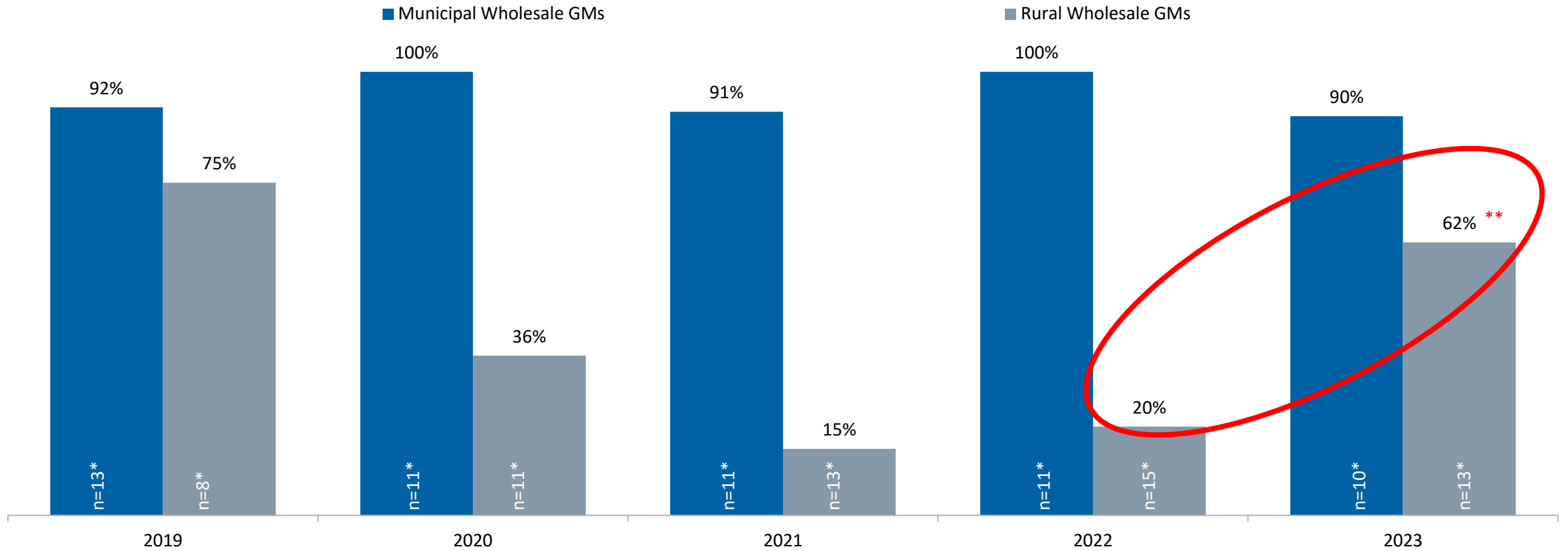
**Significant difference at the 95% confidence level in 2023 compared to 2022.

Leadership Attribute

Q10A. Please rate how well you believe the leaders at NPPD perform on the following: Providing a clear vision of future energy services.

Scores assessing NPPD's transparency in its operations remained high for Municipal GMs and increased among Rural GMs in 2023.

BEING OPEN AND TRANSPARENT IN ITS OPERATIONS (Top 2 Box)



*Small sample sizes. View results with caution.

**Significant difference at the 95% confidence level in 2023 compared to 2022.

Ethical and Fair Attribute

Q12B. How do you rate NPPD on the following: Being open and transparent in its operations?



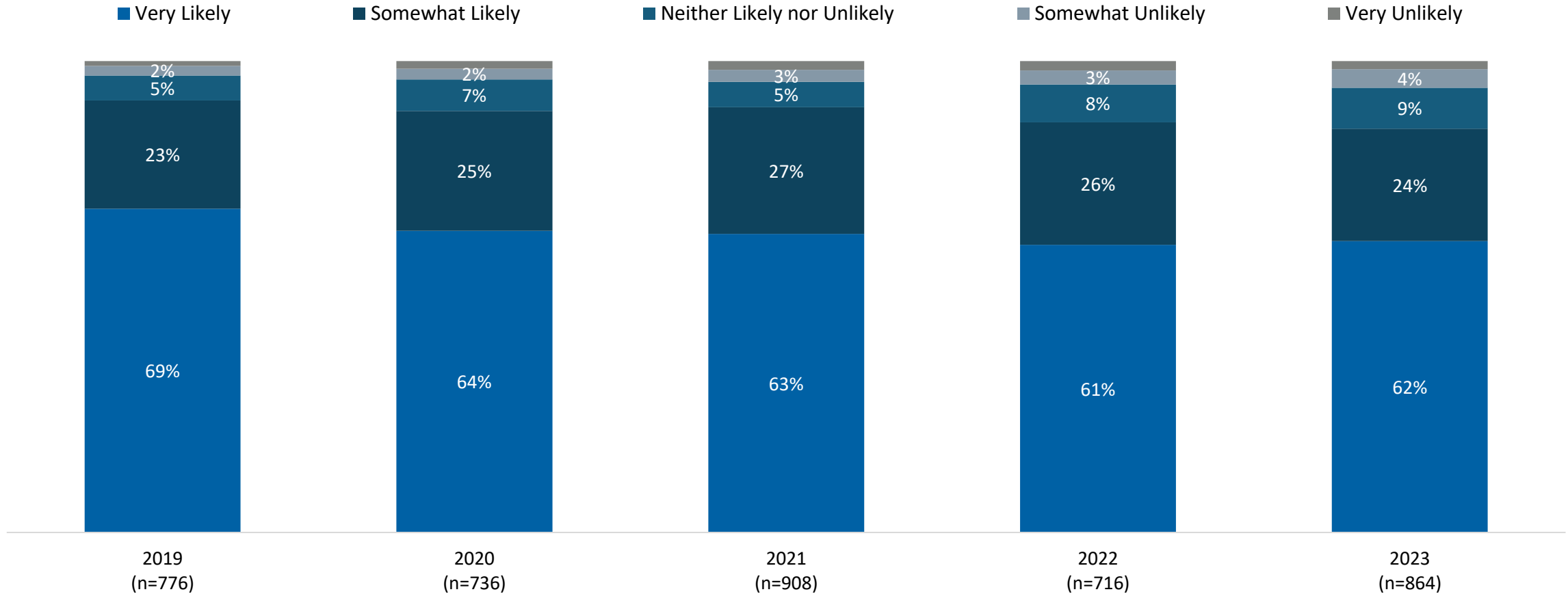
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Employees

Employees continue to be likely to recommend NPPD as an employer.

LIKELIHOOD TO RECOMMEND NPPD AS AN EMPLOYER

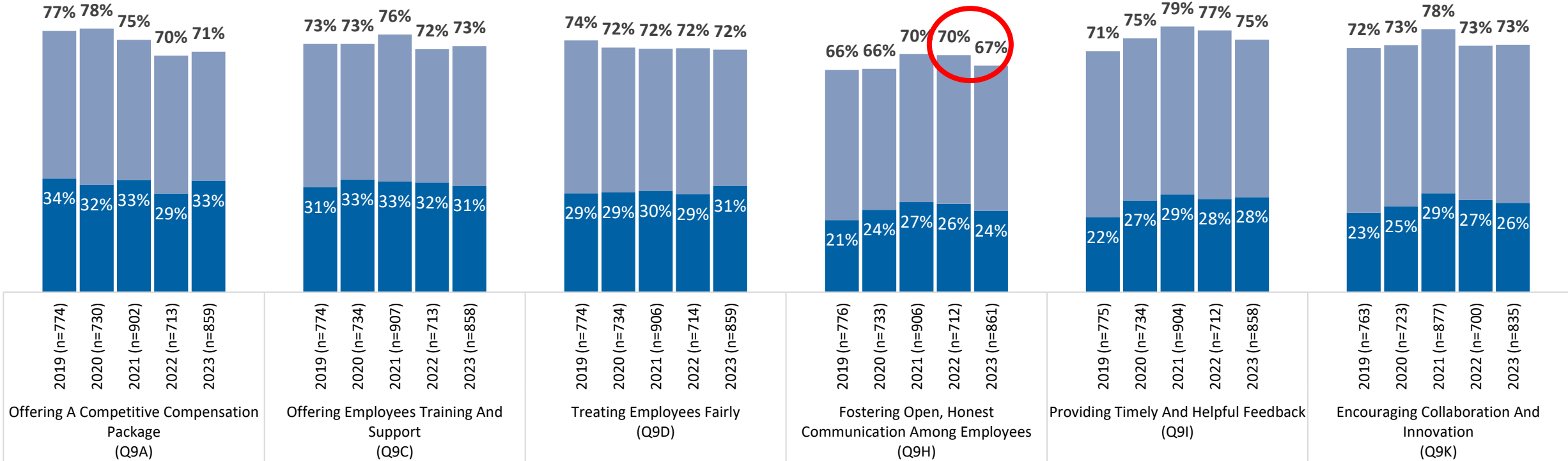


No significant differences at the 95% confidence level in 2023 compared to 2022. Q9Q. How likely are you to recommend NPPD as a great place to work?

Employee ratings of NPPD have generally remained consistent over the past year but had slight decreases in fostering open, honest communication among employees.

EMPLOYEE RATINGS OF NPPD AS EMPLOYER

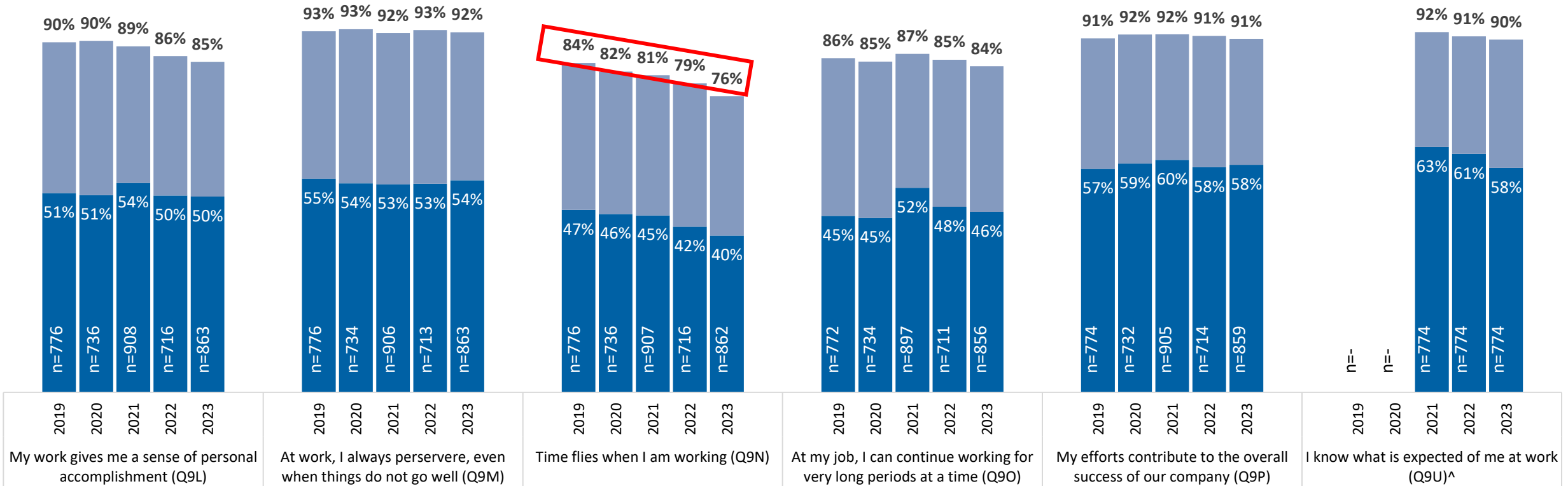
■ % Excellent ■ % Good/Excellent



Other than a slight decline for *time flies when I am working*, employee ratings on their motivation at work have held steady over the past 5 years.

EMPLOYEE RATINGS OF NPPD AS EMPLOYER

■ % Strongly Agree ■ % Somewhat/Strongly Agree



No significant differences at the 95% confidence level in 2023 compared to 2022.

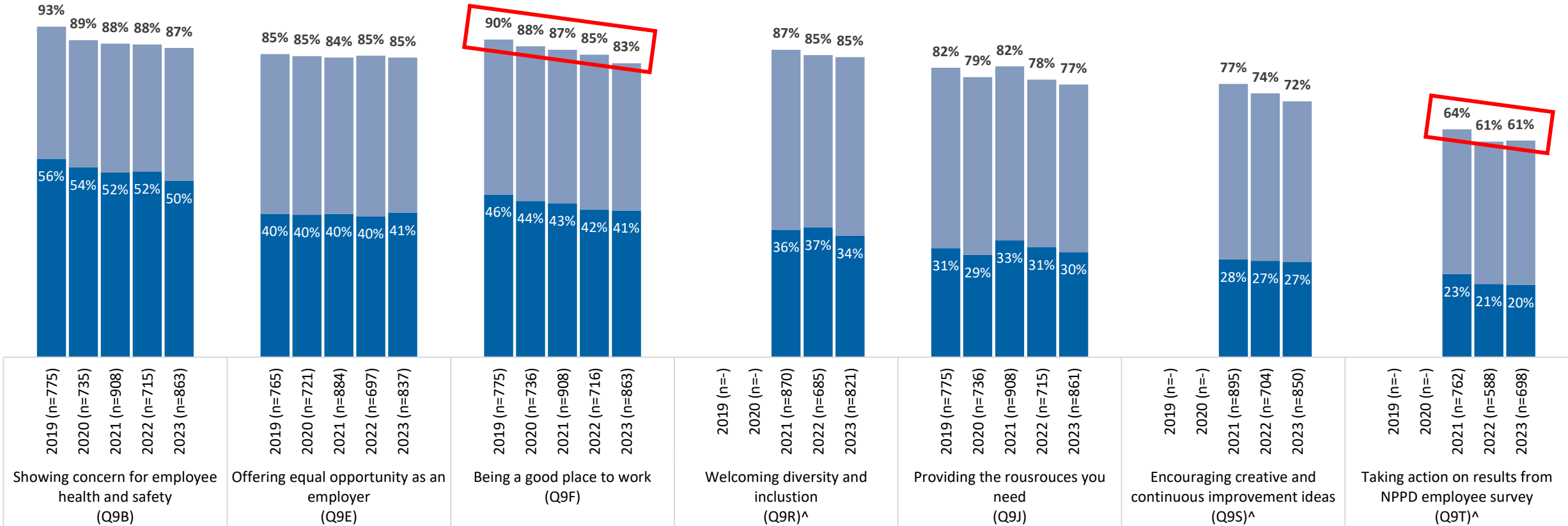
^Only asked of years shown.

Q9L-Q9U. Based on your first-hand experiences, please rate NPPD as an employer on the following.

In general, employee ratings remain excellent but there has been a steady decline over the years.

EMPLOYEE RATINGS OF NPPD AS EMPLOYER

■ % Excellent ■ % Good/Excellent



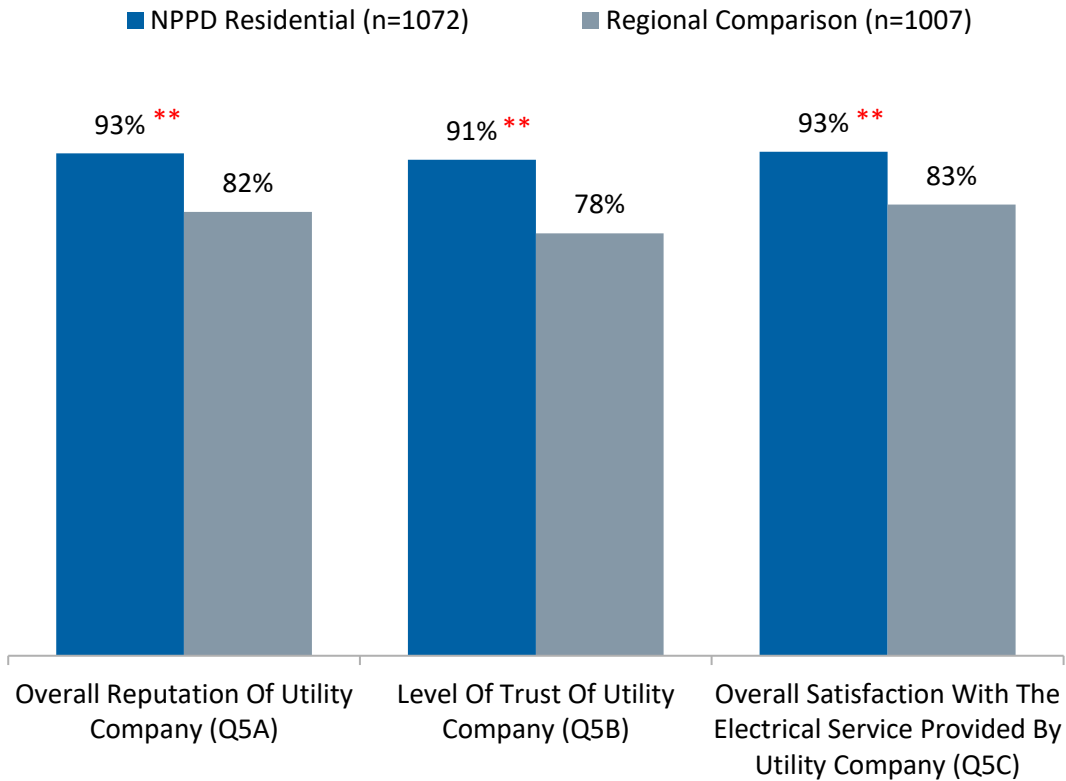


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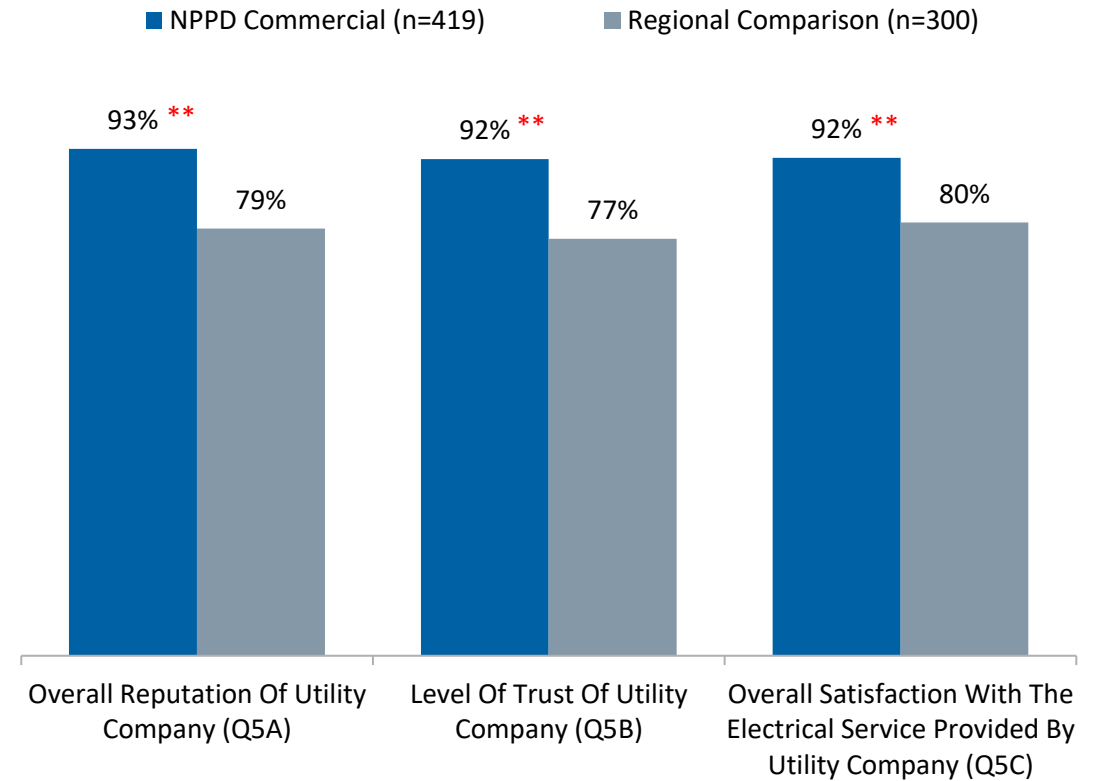
Regional Comparisons

NPPD enjoys significantly higher ratings than other energy utilities in the Midwest.

OVERALL REPUTATION RESIDENTIAL (Top 2 Box)



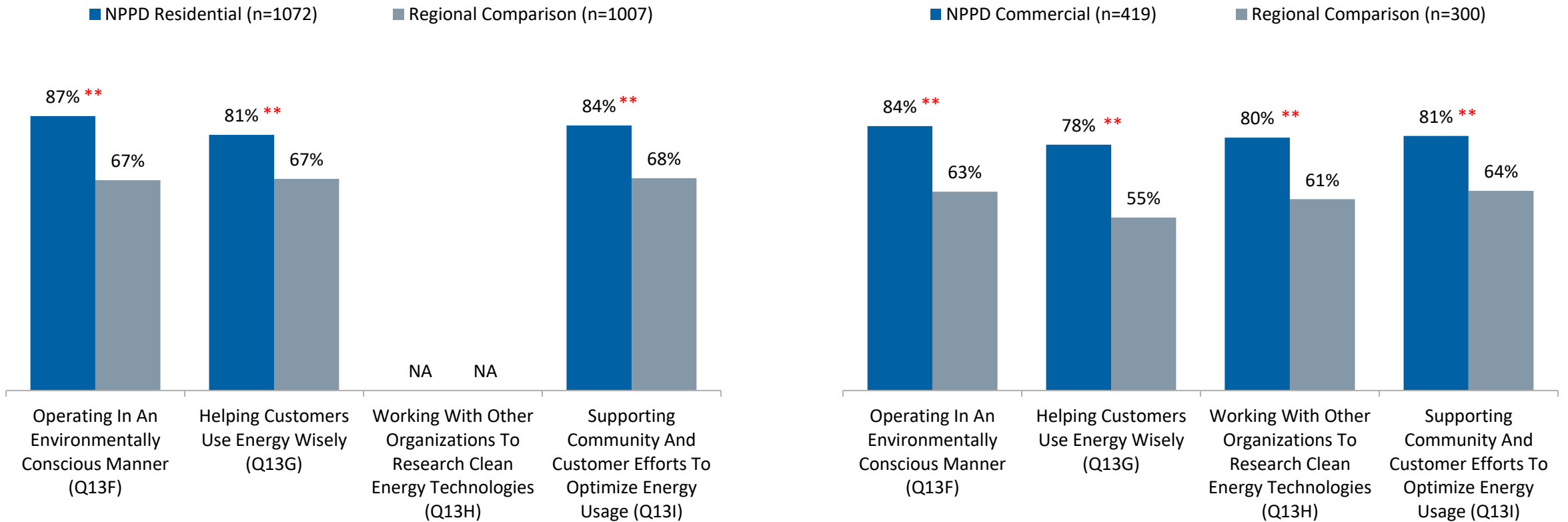
OVERALL REPUTATION COMMERCIAL (Top 2 Box)



NPPD customers rate NPPD higher on environmental matters than customers of other energy companies in the region.

ENVIRONMENTAL STEWARDSHIP RESIDENTIAL (Top 2 Box)

ENVIRONMENTAL STEWARDSHIP COMMERCIAL (Top 2 Box)



Recommendations

- Celebrate “catching your teams in the act of excellence”.
- “Stay the course”. Your relationships are strong.
- Continue tailored involvement efforts.
- Continue substantive public meetings.
- Continue to stress excellence in service delivery, being ethical and demonstrating leadership.
- Address slipping employee engagement scores by:
 - Measuring employee engagement at least twice a year and collect data down to the work group level (e.g., groups with 5 or more employees).
 - Tracking engagement by workplace flexibility arrangements.
 - Hold managers accountable for sharing the results and action planning.



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Appendix



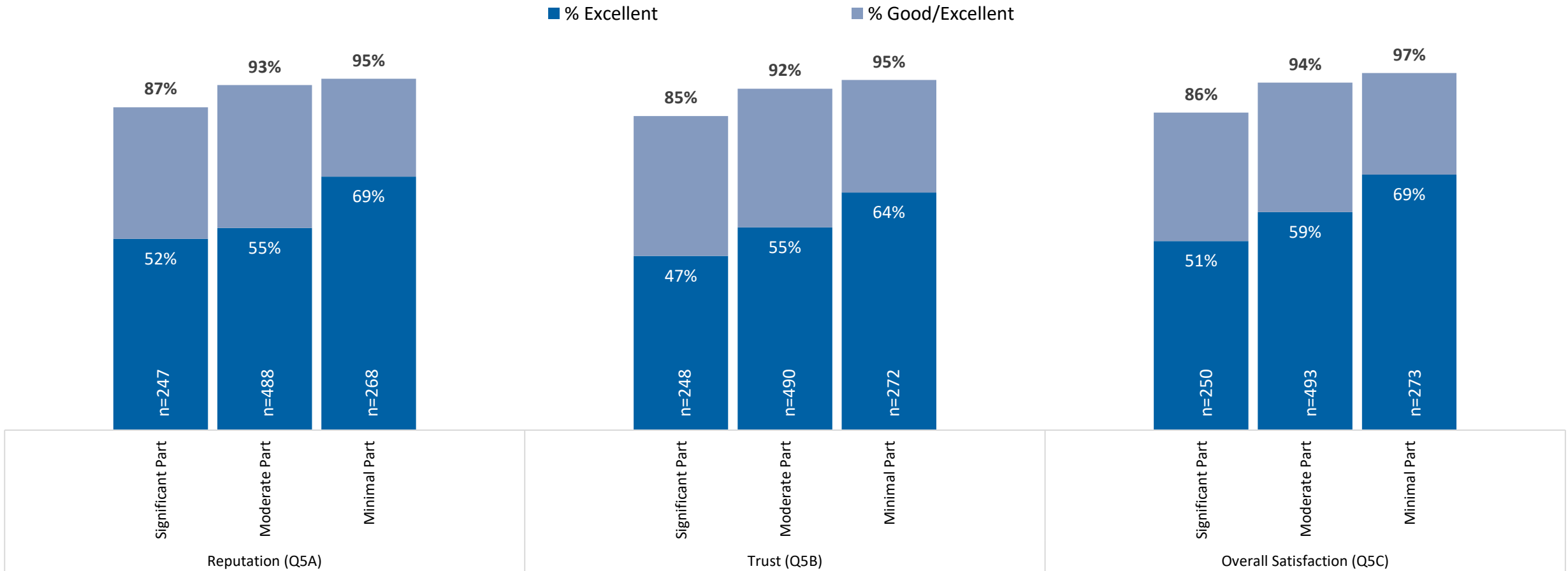
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Item Level Perceptions

Residential customers who's monthly NPPD bill is a significant part of their budget, tend to have lower ratings in each of the key metrics compared to their counterparts.

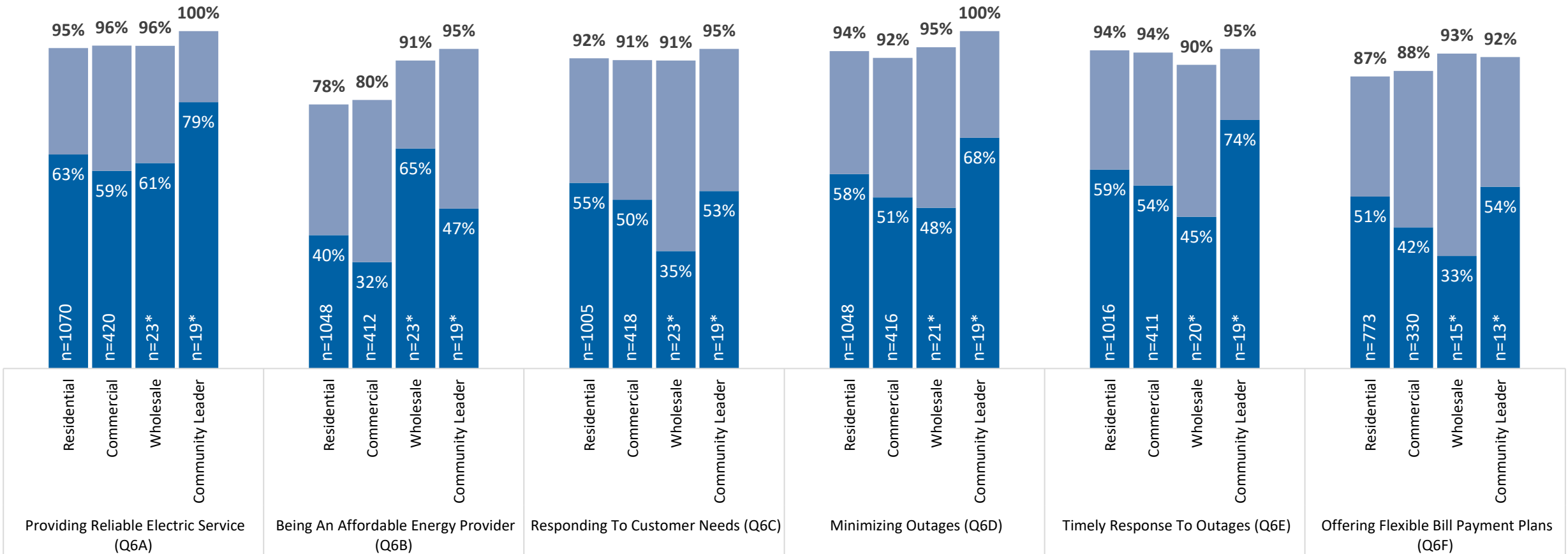
KEY METRICS BY PART OF MONTHLY BUDGET ALLOTTED TO NPPD ELECTRIC BILL



Nearly nine in ten NPPD customers rate NPPD highly in each of the service attributes, except for affordability among residential and commercial customers.

SERVICE ATTRIBUTES

■ % Excellent ■ % Good/Excellent

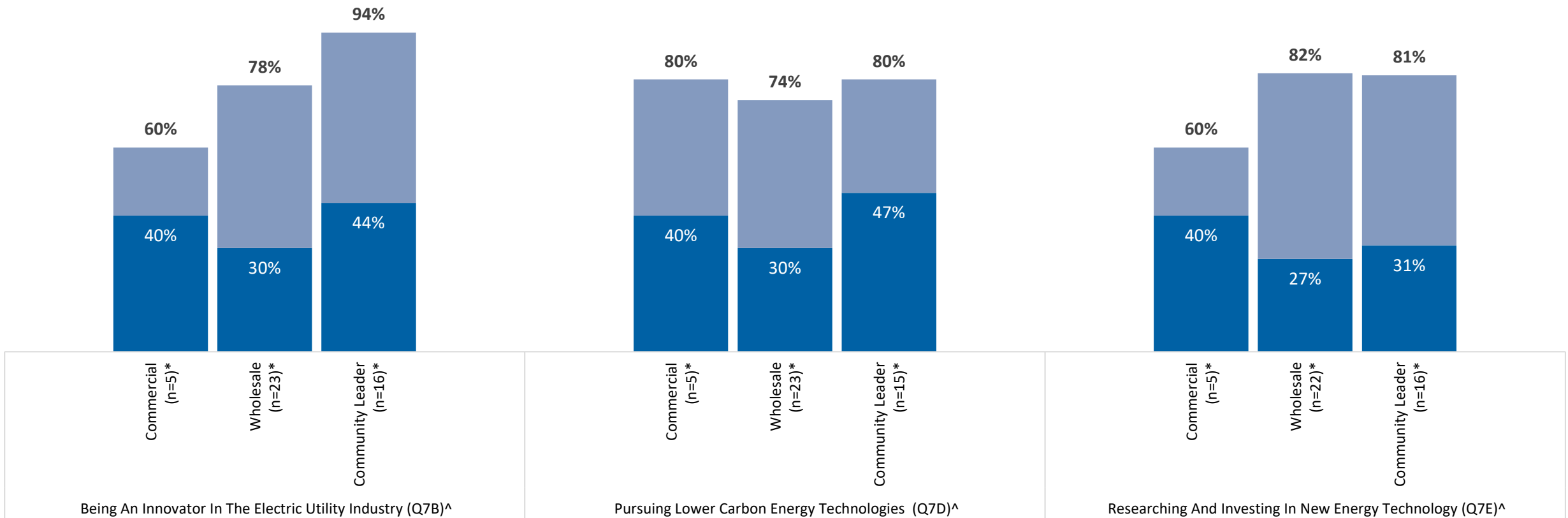


*Small sample sizes. View results with caution.
Q6A-Q6F. Based on what you know about the electrical service that NPPD provides, please rate NPPD on the follow.

Although based on small sample sizes, ratings for NPPD's innovation attributes among community leaders and wholesale customers remained high across the board.

INNOVATION ATTRIBUTES

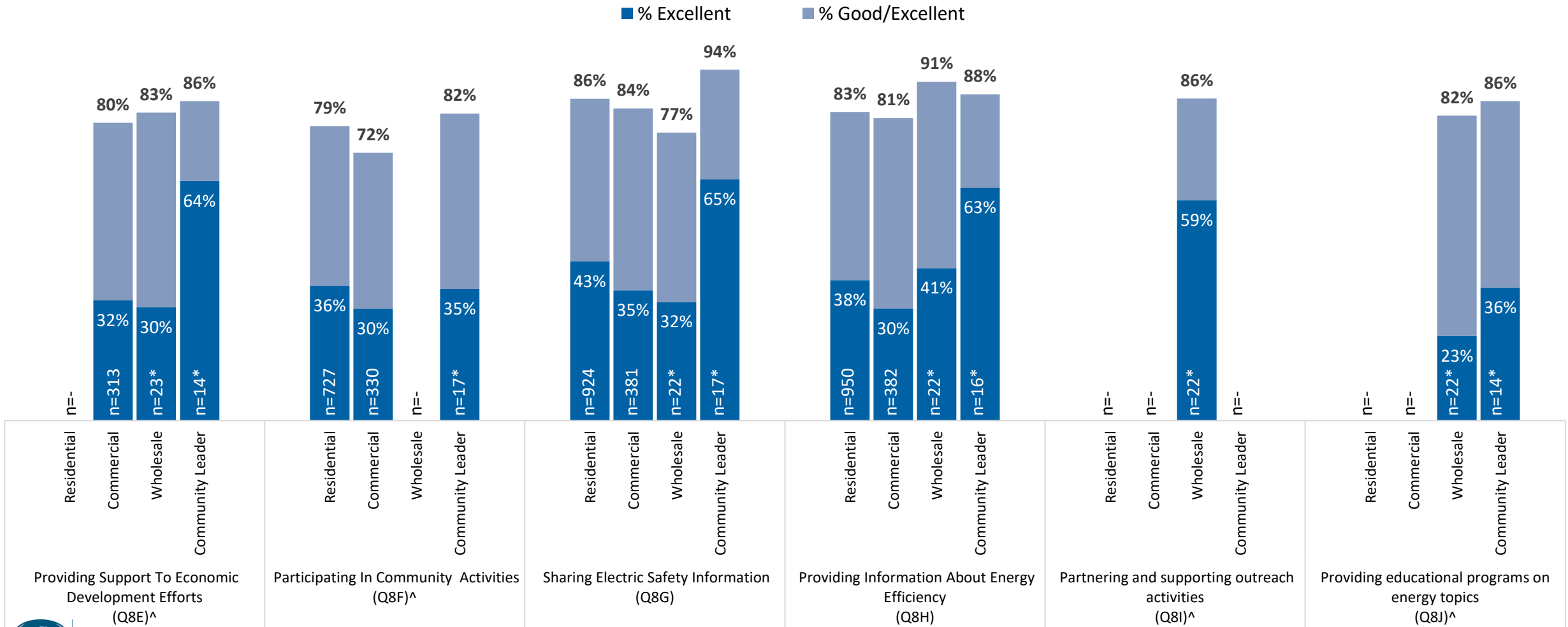
■ % Excellent ■ % Good/Excellent



*Small sample sizes. View results with caution.
[^]Q7B-Q7E asked only of Wholesale GMs, Retail Community Leaders, and Large Industrial Accounts Q7B-Q7E. How would you rate NPPD on the following aspects of change and innovation?

NPPD community partnership scores were highest for all groups in terms of sharing electric safety information and providing information about energy efficiency.

COMMUNITY PARTNERSHIP ATTRIBUTES

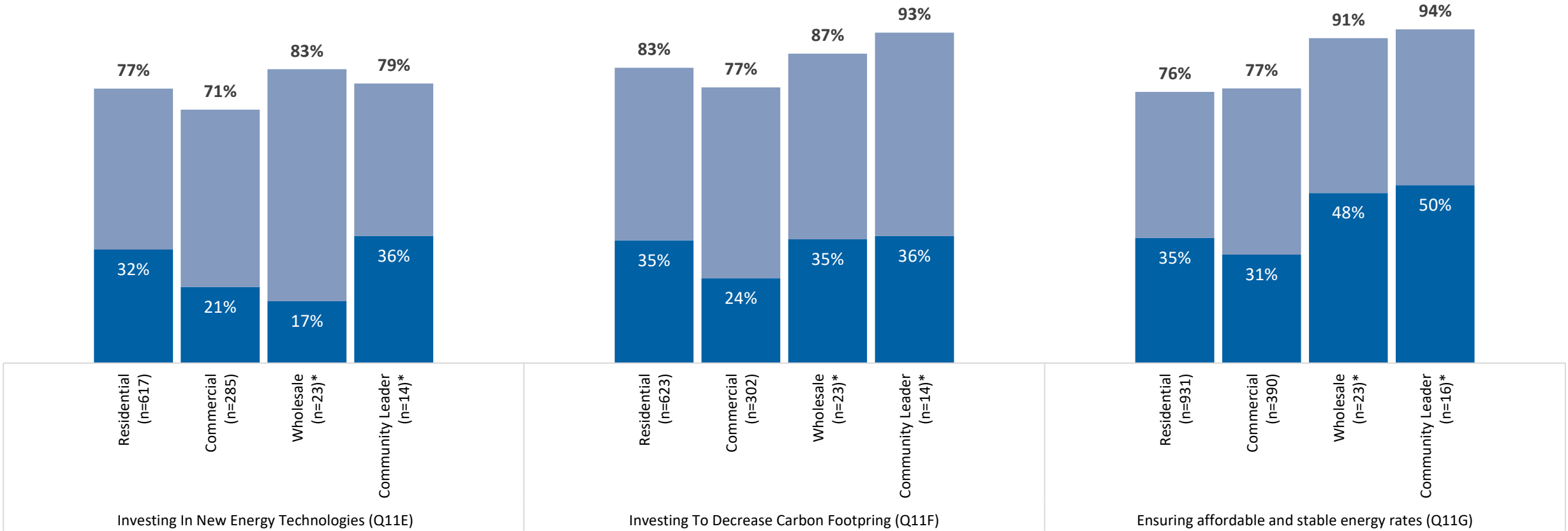


*Small sample sizes. View results with caution.
^Q8E, Q8F, Q8I, Q8J asked only of groups shown Q8E-Q8I. Please rate these aspects of NPPD's role in your community.

Residential customers gave NPPD more “excellent” ratings compared to commercial customers for each of the financial performance attributes.

FINANCIAL PERFORMANCE ATTRIBUTES

■ % Excellent ■ % Good/Excellent

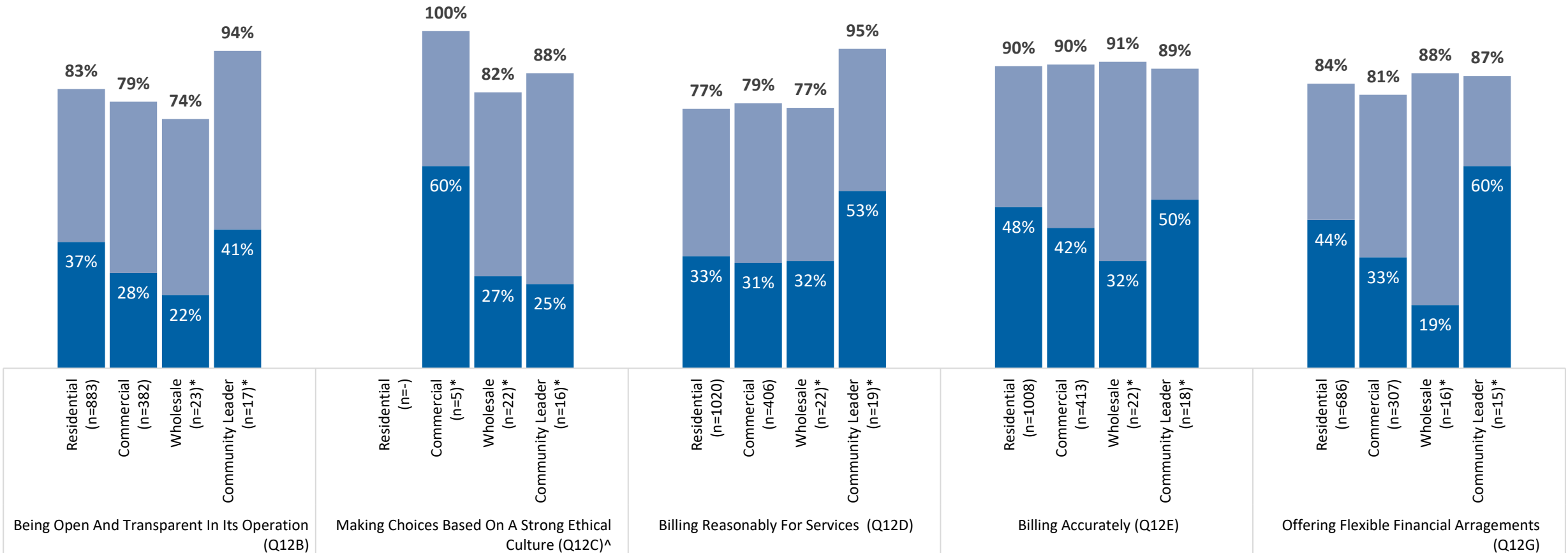


*Small sample sizes. View results with caution.
Q11E-Q11G. In your opinion, how does NPPD perform financially in terms of...

Nine out of ten respondents from each customer group gave NPPD high ratings for billing accurately.

ETHICAL AND FAIR ATTRIBUTES

■ % Excellent ■ % Good/Excellent

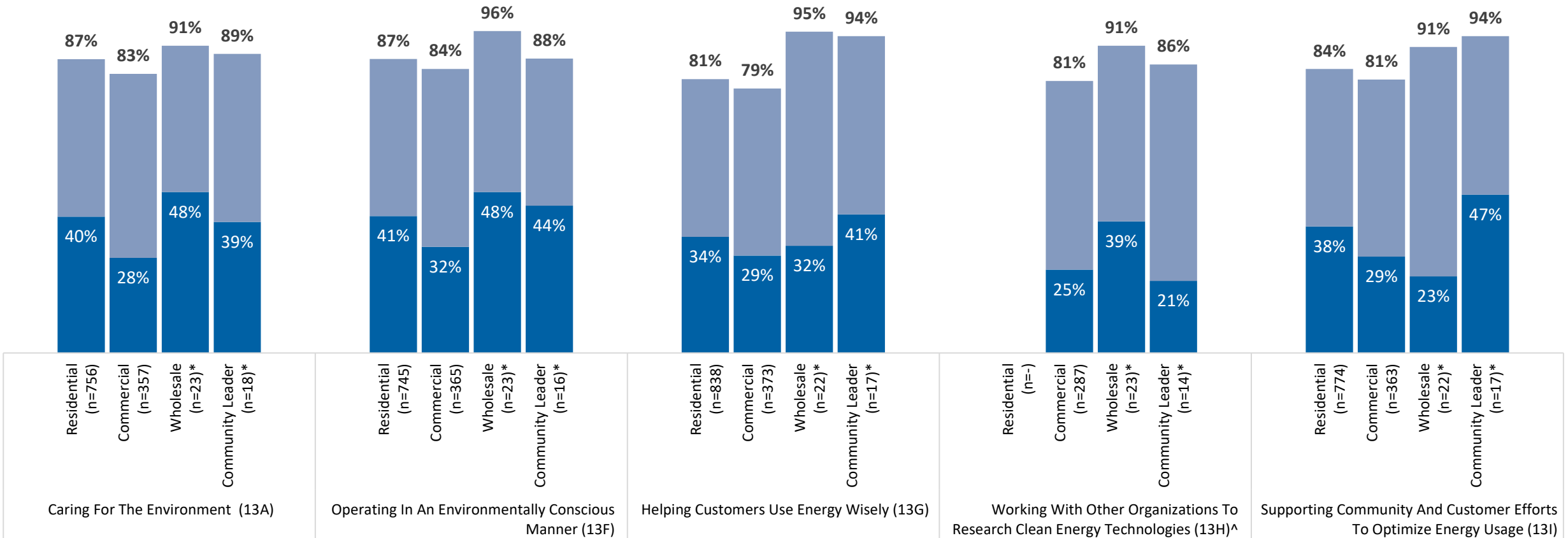


*Small sample sizes. View results with caution.
^12C asked only of groups shown.
Q12B-Q12G. How do you rate NPPD on the following?

About eight in every ten residential and commercial customers believe NPPD is environmentally friendly.

ENVIRONMENTAL STEWARDSHIP ATTRIBUTES

■ % Excellent ■ % Good/Excellent



*Small sample sizes. View results with caution.
^Q13H only asked of groups shown.
Q13A-Q13I. How do you rate NPPD on the following?



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Employees

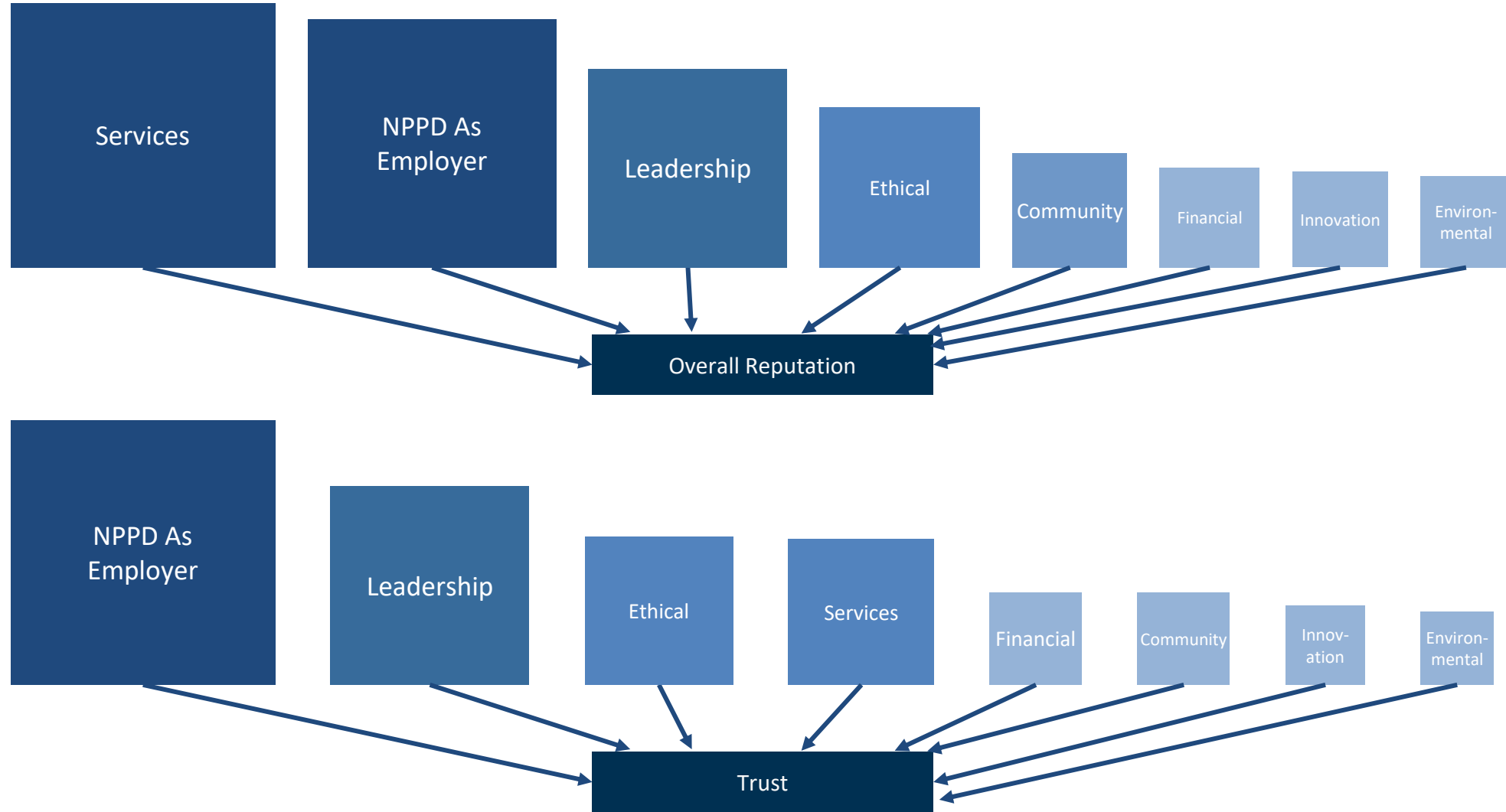
NPPD continues to have an excellent reputation and enjoy high levels of trust among employees.



*Small sample sizes. View results with caution.
 No significant differences at the 95% confidence level in 2023 compared to 2022.
 Q5A. Overall, how would you rate the reputation of Nebraska Public Power District?
 Q5B. How would you rate your level of trust of NPPD?

Key Driver Analysis (Employee Data)

Employees' perceptions of NPPD as an employer along with leadership drives trust. Overall reputation is also driven by these attributes along with services.

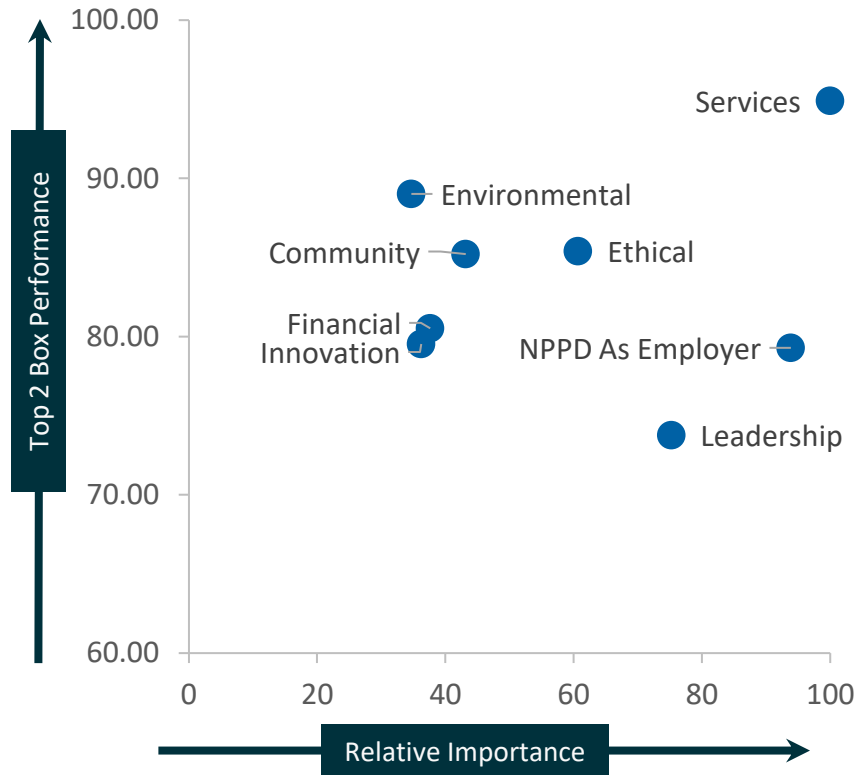


Results based on relative weights regression analysis. Area of each attribute is approximately equivalent to its impact as a driver.

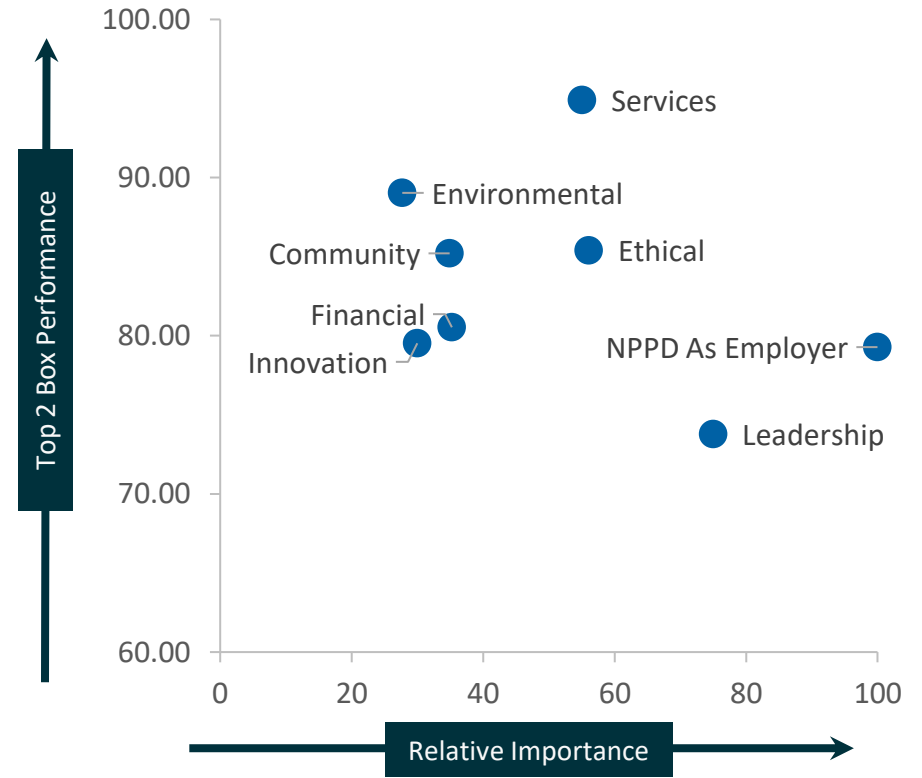
Performance on Key Drivers – (Employee Data)

Perception of NPPD as an employer continues to present the best opportunity to improve both overall reputation and trust.

REPUTATION



TRUST





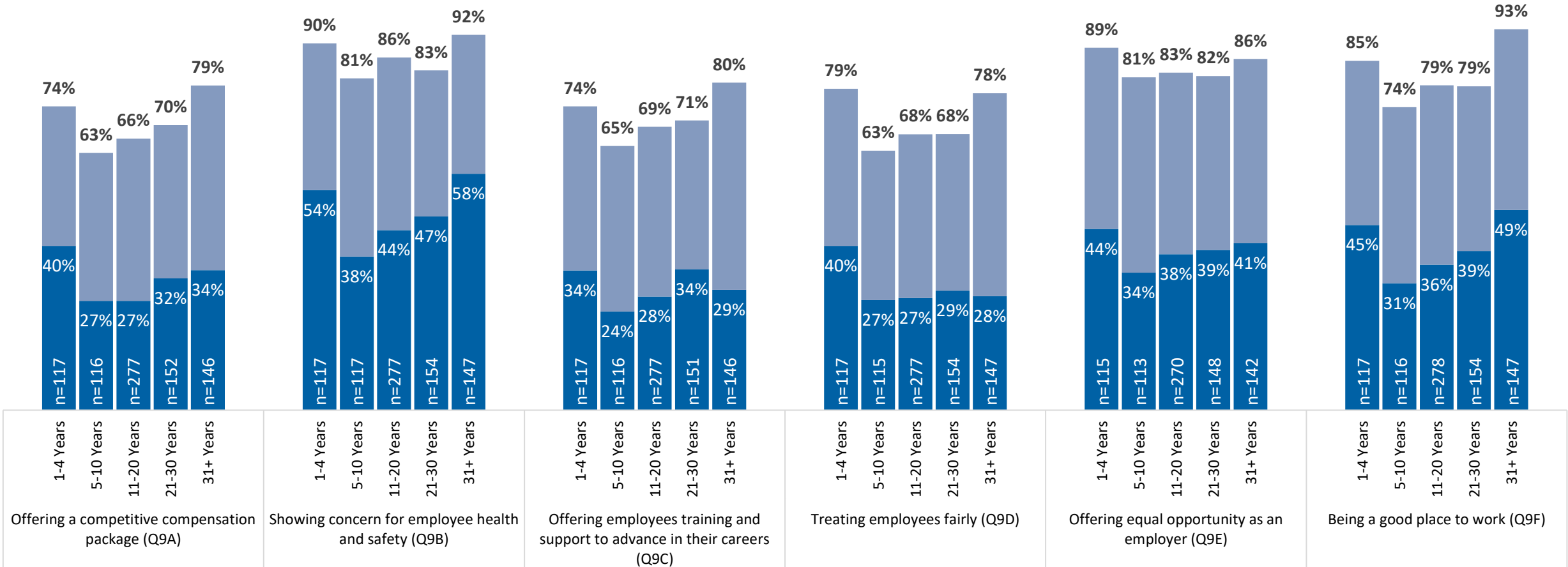
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Employee Tenure Analysis

Employees with either a longer (31+ years) or newer (1-4 years) tenure tended to rate NPPD higher overall compared to those in the middle of their career with NPPD.

EMPLOYEE PERCEPTIONS BY TENURE

■ % Excellent ■ % Good/Excellent



*Employees with less than 1 year tenure (n=51) excluded
Q9A-Q9F. Based on your first-hand experiences, please rate NPPD as an employer on the following.



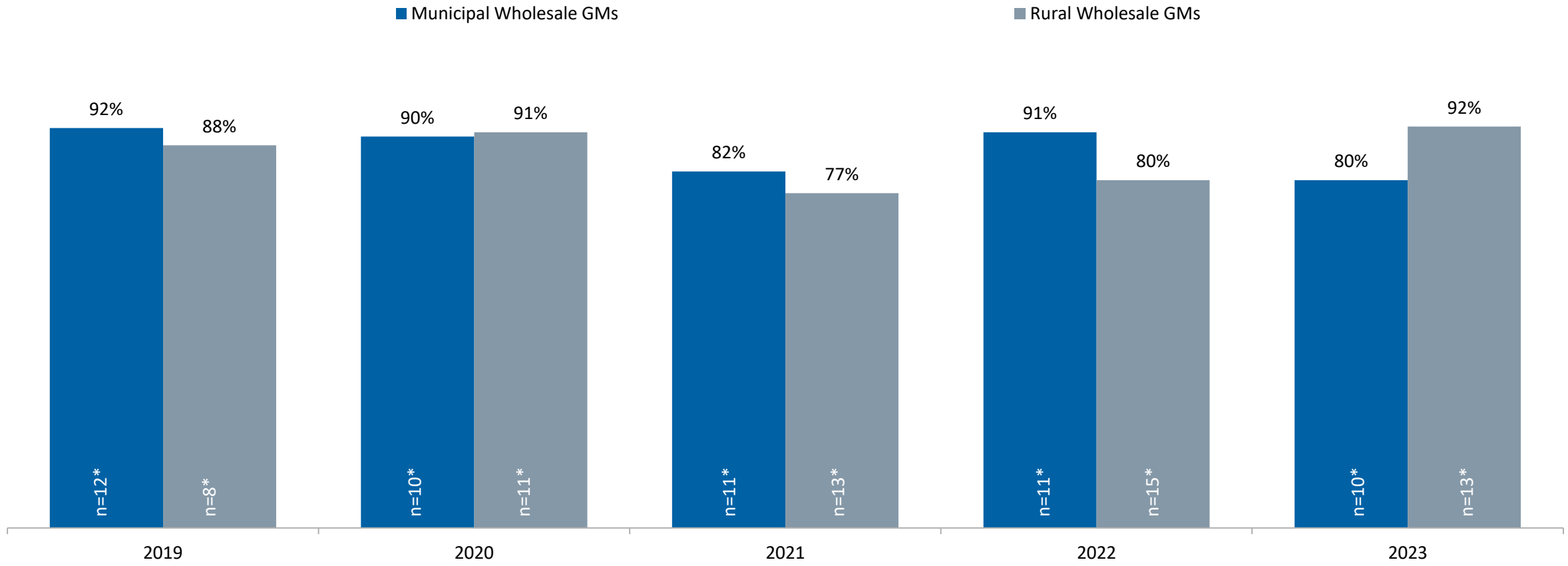
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Wholesale GMs Municipal vs. Rural

At least eight out of ten Municipal GMs and three out of four Rural GMs reported satisfaction with capitalizing on providing customers better, more affordable services.

CAPITALIZING ON OPPORTUNITIES TO PROVIDE CUSTOMERS BETTER SERVICE AT LOWER COSTS (Top 2 Box)



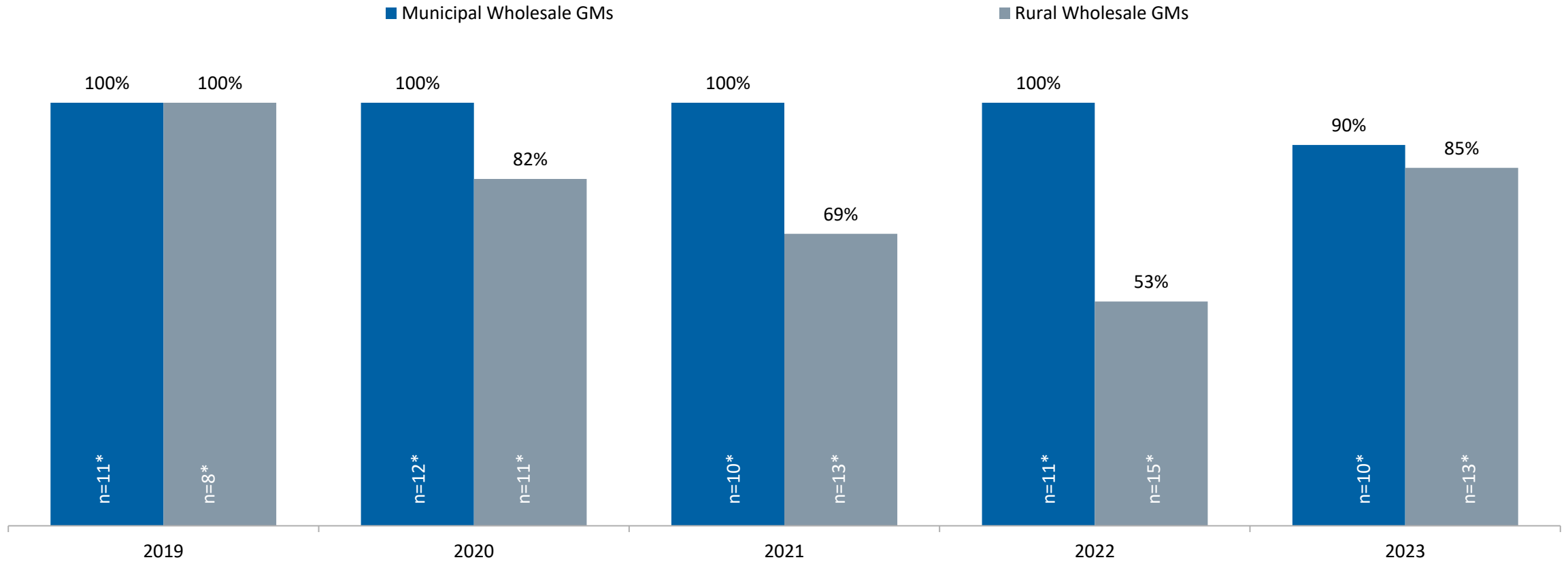
*Small sample sizes. View results with caution.
No significant differences at the 95% confidence level in 2023 compared to 2022.

Leadership Attribute

Q10D. Please rate how well you believe the leaders at NPPD perform on the following: Capitalizing on opportunities to provide customers better service at lower costs.

At least eight out of ten wholesale GMs rating NPPD high on acting ethically in 2023. Over the years, scores tended to be higher among Municipal GMS compared to Rural GMS.

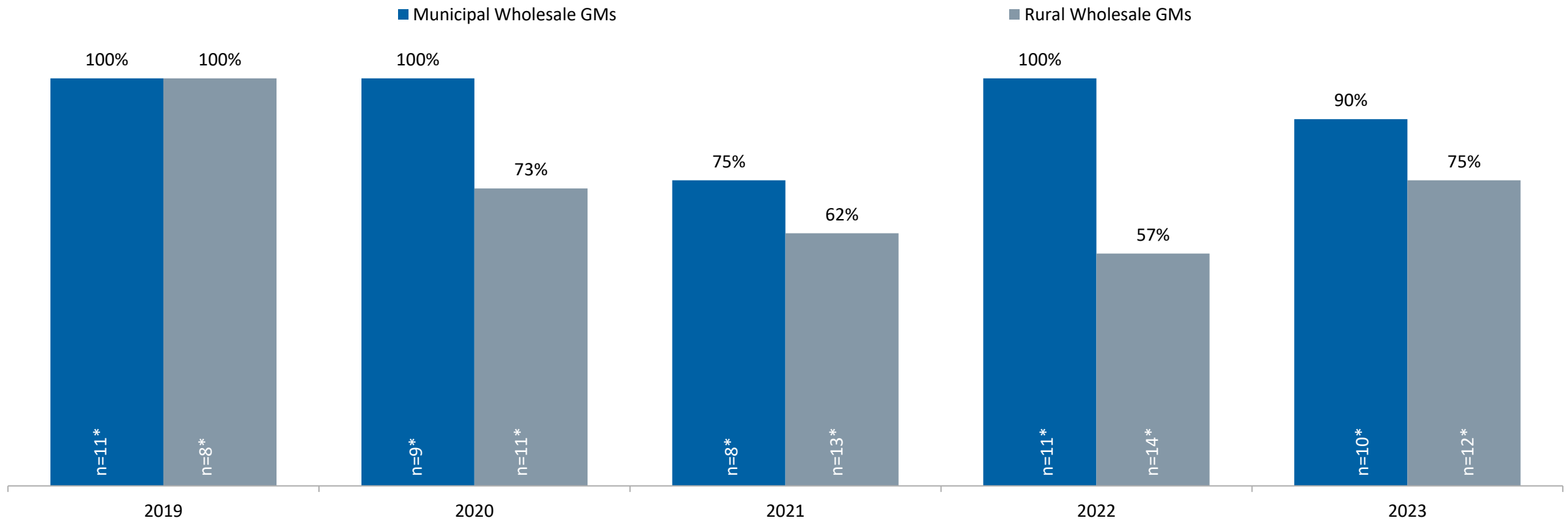
ACTING ETHICALLY (Top 2 Box)



*Small sample sizes. View results with caution.
No significant differences at the 95% confidence level in 2023 compared to 2022.
Leadership Attribute
Q10E. Please rate how well you believe the leaders at NPPD perform on the following: Acting ethically.

Municipal GMs continued to give higher ratings than Rural GMs when it comes to NPPD making choices based on a strong ethical culture.

MAKING CHOICES BASED ON A STRONG ETHICAL CULTURE (Top 2 Box)



*Small sample sizes. View results with caution.
 No significant differences at the 95% confidence level in 2023 compared to 2022.
Ethical and Fair Attribute
 Q12C. How do you rate NPPD on the following: Making choices based on a strong ethical culture?

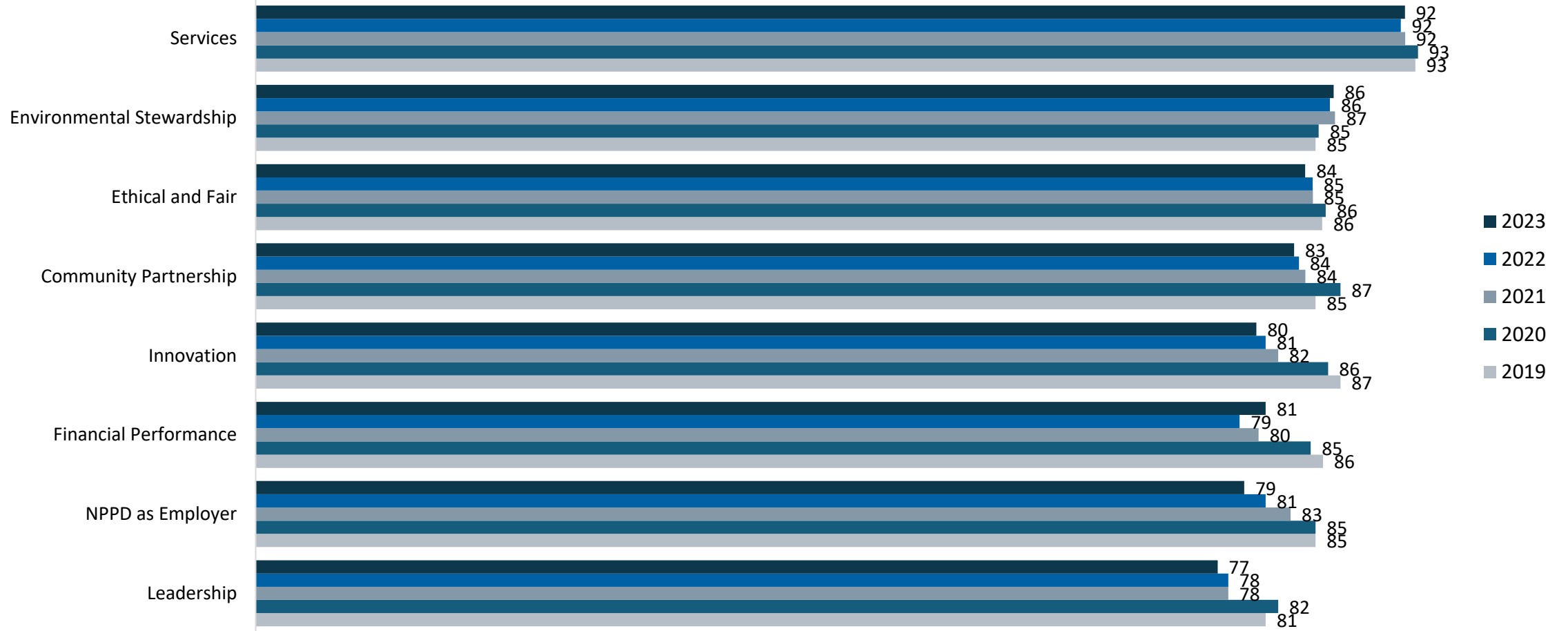


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Categorical Perceptions

Ratings across attributes have remained consistently high throughout the years.

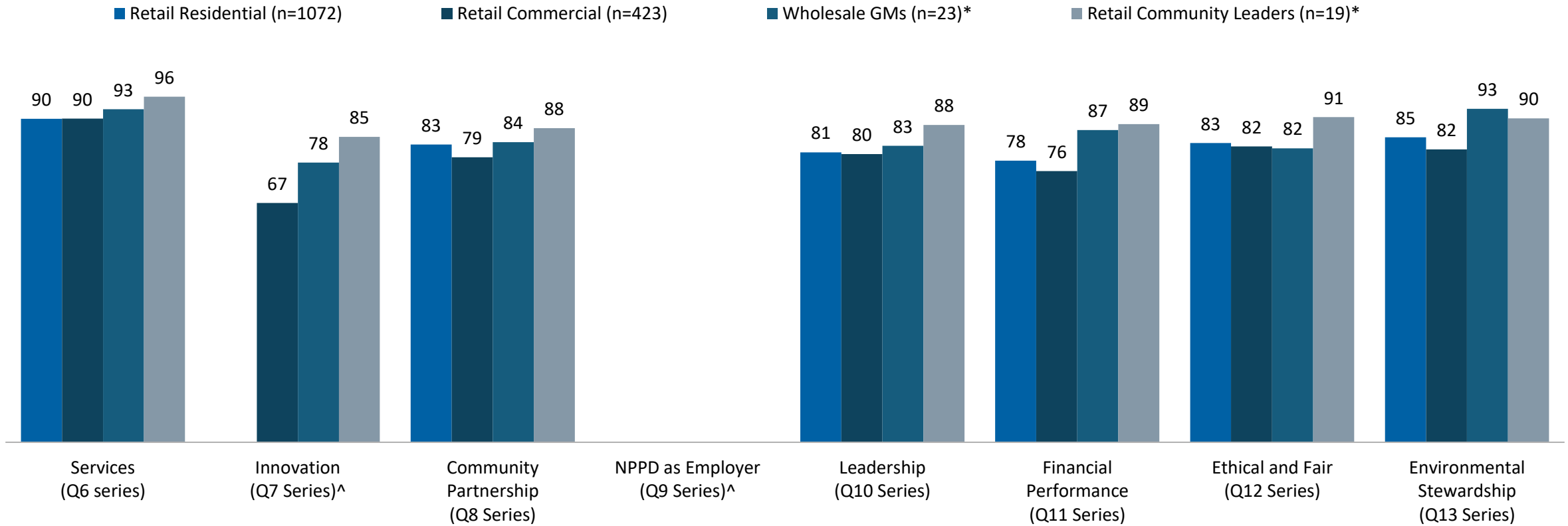
COMPOSITE ATTRIBUTE SCORES



Composite scores are combined Top-2 Box scores for each question series
 *In 2023 added Q8i and Q8j to Community Partnership and added Q11g to Financial Performance.

Retail Community Leaders consistently score the highest across all composite scores. Overall scores were highest for NPPD's services.

2023 COMPOSITE ATTRIBUTE SCORES



*Small sample sizes. View results with caution.
Composite scores are combined Top-2 Box scores for each question series
^Only asked of groups shown



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Respondent Profiles

Respondent Profile – Retail Residential

Gender	2023 (n=1050)
Male	48%
Female	52%

Age	2023 (n=1072)
18-20	>1%
21-30	4%
31-40	9%
41-50	14%
51-60	17%
61-70	29%
71+	24%
Refused	1%

Education	2023 (n=1072)
Some HS no degree	1%
High school graduate	17%
Some college no degree	27%
Associate degree	16%
Bachelor degree	23%
Postgraduate degree	14%
Refused	3%

Residence Location	2023 (n=1072)
In town or city	87%
Next to town	7%
Country	6%
Refused	-

Residence Type	2023 (n=1072)
Single-family	83%
Duplex/Triplex	5%
Apartment/Condo	9%
Other	4%
Refused	-

NPPD Electrical Bill Part of Monthly Budget	2023 (n=1072)
Significant part of budget	23%
Moderate part of budget	46%
Minimal part of budget	26%
Refused	5%

HH Income	2023 (n=1072)
Under \$25,000	13%
\$25K to just under \$50K	21%
\$50K to just under \$75K	15%
\$75K to just under \$100K	12%
\$100K to just under \$125K	7%
\$125 to just under \$150K	5%
\$150K or more	7%
Refused	21%

Avg. monthly electric bill	2023 (n=1072)
<\$50	2%
\$51-60	2%
\$61-70	3%
\$71-80	5%
\$81-90	6%
\$91-100	10%
\$101-120	14%
\$121-140	12%
\$141-160	10%
\$161-180	8%
\$181-200	8%
\$201-250	10%
\$251-300	6%
\$301+	5%
Refused	-

Respondent Profile – Employees/Retirees, Commercial/Industrial, and Other

EMPLOYEES/RETIRES

Age	Employees 2023 (n=864)	Retirees 2023 (n=211)
18-20	-	-
21-30	9%	-
31-40	21%	-
41-50	23%	-
51-60	25%	5%
61-70	13%	54%
71+	1%	38%
Refused	9%	3%

Length of NPPD Employment	Employees 2023 (n=864)	Retirees 2023 (n=211)
< 1 year	6%	-
1-4 years	14%	-
5-10 years	14%	1%
11-20 years	32%	12%
21-30 years	18%	26%
31+ years	17%	61%

COMMERCIAL/INDUSTRIAL

Time managing utility relationships	Commercial/Industrial 2023 (n=424)
<1 year	8%
1-4 years	19%
5-10 years	17%
11-20 years	20%
21-30 years	14%
31+ years	22%
Refused	<1%

Perception of company electric bill	Commercial/Industrial 2023 (n=424)
High for org. your size	29%
About right	69%
Low for org. your size	2%

OTHER

Time in Position	Wholesale GMs/Mgrs. 2023 (n=23)	Retail Community Leaders 2023 (n=19)
<1 year	-	26%
1-4 years	35%	16%
5-10 years	17%	47%
11-20 years	30%	5%
21-30 years	13%	-
31+ years	4%	5%
Refused	-	-



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Survey Overview

Survey Overview

- Objective: Assess and understand reputation of NPPD among key stakeholder groups, identify expectations and perceptions of stakeholder groups, and track performance against prior studies.
- Surveys were collected by The MSR Group from March 8, 2023 through April 21, 2023.

Stakeholder Group	Survey Methodology	2019 Completes	2020 Completes	2021 Completes	2022 Completes	2023 Completes
Retail Residential	Email to online**	1028	1037	1058	1035	1072
Retail Commercial & Large Industrial	Email to online**	431	422	418	441	424
Retail Community Leaders	Email to online**	35	28	21	31	19
Wholesale GMs/City Managers	Email to online**	22	23	25	26	23
Employees	Email to online**	776	736	908	716	864
Retirees	Email to online**	218	150	262	201	211

***Follow-up phone calls made to boost completes*

- Responses for Retail Commercial and Retail Large Industrial are combined and labeled as Retail Commercial due to the similarity of results.

Survey Overview

- Introduced changes in 2023 in question wording:
 - Changed “pursuing” to “investigating” in Q7d, as well as added “that are both reliable and affordable”.
 - Added examples in Q7e: electric vehicles, solar, battery storage, carbon capture, hydrogen, etc.
 - Added examples in Q11e: carbon capture, hydrogen.
 - Added “while maintaining reliability and affordability” to Q11f.
 - Added examples to Q12g: pennies for power, flexible payment arrangements, local/community agencies, etc.
 - Added “affordable, reliable, and efficient” to Q13h.
- Only asked Q8f (Participating in community activities) to Retail Residential, Retail Commercial, Retail Large Industrial and Community Leaders this year instead of asking it to everyone.
- Added new questions Q8i (Partnering and supporting outreach activities) and Q8j (Providing educational programs on energy topics) to the Community Partnership section.
- NPPD as Employer questions Q9a-Q9f were only asked of Employees this year, no longer including Retirees.
- Added new question Q11g (Ensuring affordable and stable energy rates) to the Financial Performance section.
- Continued with consistent email to phone protocol.