

**2001 CUSTOMER SATISFACTION RESEARCH  
GENERAL SERVICE ACCOUNTS  
BASELINE STUDY**

**FINAL REPORT**

**Prepared For:**



Newfoundland & Labrador Hydro  
Hydro Place, Columbus Drive  
P.O. Box 12400  
St. John's, NF A1B 4K7

**Prepared By:**



www.marketquest.ca  
P. O. Box 13305, Stn. A  
42 O'Leary Ave.  
St. John's, NF A1B 4B7  
Tel: (709) 753-5172  
Fax: (709) 738-5288

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## **1.0 STUDY BACKGROUND AND METHODOLOGY**

### **1.1 Study Background**

On behalf of Newfoundland & Labrador Hydro (Hydro), during early October 2001, Market Quest Research completed a baseline General Service Customer Satisfaction research study. The main purpose of this research was to measure the performance of Hydro in providing customer service to its general service or commercial customers and to provide a baseline against which to compare future company performance.

Newfoundland & Labrador Hydro has approximately 28,000 residential accounts and 4,700 general service accounts in rural Newfoundland and Labrador communities.

Hydro has been measuring the satisfaction of its residential customers through a Baseline Customer Satisfaction Study in 1999 and through annual tracking studies completed in 2000 and 2001. This study represents Hydro's first effort to monitor the customer satisfaction of its general service customers. The establishment of a 2001 baseline study is intended as a starting point, providing the groundwork against which to compare future performance. It is recommended that performance indicators be collected on an annual basis to "track" and measure any movement in commercial customer expectation and satisfaction with the performance of Hydro.

Service quality is a measure of how well the service delivered matches customer expectation. This study recognizes that customer satisfaction is not only a function of customer service delivery but also a function of specific attributes of the physical service. As a service company, to achieve sustainable customer satisfaction, Hydro must aim to provide customers with outstanding value, exceeding their expectations on both tangible and intangible service. The findings of this report identify areas of potential improvement upon which service initiatives and goals should be established to motivate staff in providing *excellent service* which exceeds customer expectations.

## 1.2 Study Methodology

The research methodology chosen for this study was a quantitative telephone survey of Hydro's general service customer base in Newfoundland & Labrador. Data collection was undertaken from October 9th-15th and a total of 270<sup>1</sup> customers were contacted. This study sample size<sup>2</sup> is sufficient to provide a high level of confidence (overall study margin of error:  $\pm 5.0\%$ , 19 times out to 20 or at the 95% confidence level).

The sampling frame included all general service customers within Hydro's service areas/communities who recognize Hydro as their service provider. The sampling unit was selected to be the individual within an organization who is responsible for paying the electric bill and dealing with the electric company on customer service issues.

The questionnaire or survey instrument was designed by Market Quest Research in consultation with the client (Appendix A) and was approximately 10 minutes in length. Prior to full-scale data collection efforts, a pretest of approximately 30 surveys was completed to ensure an efficient and effective flow of information, an accurate sample selection and to confirm the survey length. Subsequent to this pre-test, modifications were made to the survey design and finalized prior to undertaking full scale data collection effort .

All data collection was completed at Market Quest's in-house interviewing facilities. The data collection process was continually monitored by a senior supervisor who conducted a 10% quality control on surveys to ensure a high standard of accuracy. Following data collection, surveys were 100% edited and coded by a research assistant prior to data entry. Data entry was completed, also utilizing a 10% quality control check. All data analysis was conducted in-house using the SPSS statistical analysis program.

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<sup>1</sup> For eight of the customers contacted, the individuals responsible for billings and customer service were not the same. Therefore, two surveys were completed for each of these eight customers with pertinent sections completed by the appropriate respondent.

<sup>2</sup> Although Hydro has approximately 4700 general service accounts, one "customer" may be responsible for more than one account in more than one rate area. The population from which this sample was created includes each customer only once, regardless of the number of accounts they hold with Hydro.

### **1.3 This Report**

The analysis contained in this report profiles the population of Hydro's general service customers. The survey data has been analyzed or cross-tabulated by the demographic characteristics of customers (gender, industry, number of properties, rate area and years of service) and where appropriate it is noted where this analysis provides insight and informational value to the purpose of this study.

All detailed findings are presented in the body of this report and for the reader's convenience, a Summary of Key Findings is presented in Section 2.0.

## 2.0 SUMMARY OF KEY FINDINGS

*The majority of Hydro general service customers are satisfied with the overall service reliability of Hydro. However, with 40% of respondents indicating they are less than “very satisfied” Hydro should explore improving its service delivery in this area.*

- ◆ On a 10 point satisfaction scale, customers rate their overall supply of electricity with a mean rating of 8.8.
- ◆ A slight majority of customers (60%) indicate they are “very satisfied” with the supply of electricity they receive from Hydro with less than 2% of customers expressing dissatisfaction.
- ◆ Complete satisfaction with service reliability is low, with 40% of general service customers indicating they are less than “very satisfied”, with only 5% reporting that Hydro exceeds their expectations on this issue.
- ◆ A gap is found to exist when comparing the rated performance of Hydro against its rated importance on the service attributes “a reliable, uninterrupted supply of electricity” and “electricity quickly restored when there is a power outage” (mean gap scores of -1.4 and -1.6, respectively).

*Satisfaction with Hydro’s customer service is high with most customers rating themselves as “somewhat satisfied” (31%) or “very satisfied” (63%) with the customer service provided by Hydro.*

- ◆ Ninety-four percent of customers indicate that Hydro met their expectations with regards to customer service. However, fewer than 3% said that Hydro exceeds their expectations indicating there is room for improvement with the delivery of customer service.

*Hydro customers rate each of the sixteen service attributes as important components of overall service delivery (mean ratings range from 8.9 to 9.9). When compared to importance ratings, customers rated Hydro’s performance less positively with expectations of service being higher than that delivered by Hydro.*

- ◆ Hydro commercial customers report that “electricity at a reasonable cost” and “electricity quickly restored when there is a power outage” are the most important attributes of an electric company.
- ◆ Mean performance scores for each of the sixteen attributes range from 5.85 to 9.26.

- ◆ Hydro scores highest in performance on the attributes “concern for public safety”(9.3 mean rating) and “friendly and courteous employees”(9.2 mean rating) and performed most poorly on the attribute “contributes back to the community” (5.9 mean rating).

***Commercial customers' expectations fall below rated performance on each of the sixteen service attributes.***

- ◆ The largest “gap” in customer expectations and Hydro performance is evident with the attribute “electricity at a reasonable cost” (a negative difference of 3.32). Second to this, Hydro falls 3.28 points below expectations when evaluated on its contributions back to the community.

***Commercial customers are less than extremely satisfied with most components of their electric bill.***

- ◆ While a small majority of customers rate Hydro as “excellent” on each of the five components of billing, ratings of “good” or less were also prevalent (range from 26% to 43%).
- ◆ The majority of customers are satisfied with the explanation of their current account balance as it was described on their electricity bill (74% “excellent” and 22% “good”).
- ◆ Customers express the lowest level of satisfaction with the explanation of electricity usage as described on their electric bill (57% “excellent”, 31% “good” ). Hydro may wish to reassess how this information is presented on the monthly electric bill.
- ◆ When asked for suggestions for improvement to their electric bill, approximately 9% of customers offer suggestions including ideas such as a simpler layout and detailing previous years consumption on a monthly basis.

***Most Hydro customers who participated in the study report being customers of Hydro for an average of 18 years with slightly less than half indicating they have been customers for twenty years or more.***

## 3.0 PROFILE OF SURVEY RESPONDENTS

This section details the demographic composition of survey respondents. In addition, years as a customer and rate area/region are also profiled.

### 3.1 Demographic Characteristics

	<u>Respondents (n=270)</u>
GENDER:	
Male	37.8
Female	62.2
INDUSTRY:	
Retail	39.2
Government	22.3
Entertainment	9.7
Primary Industry	8.6
Service Industry	5.8
Construction	3.6
Manufacturing	3.2
Church	3.2
Health Care	2.2
Real Estate	1.4
Telecommunications	0.7
NUMBER OF PROPERTIES	
1 - 10	91.4
11 - 20	5.0
21-30	0.7
31+	2.9

- ◆ Among general service customers, the individual responsible for dealing with Newfoundland Hydro on customer service issues and billings is most often female (62%) and less often male (38%).
- ◆ Hydro customers represent a wide range of industries, with most of those surveyed involved in retail (39%), government (22%) or the entertainment sector (10%).
- ◆ For approximately 52% of those customers surveyed, Hydro supplies electricity to only one property or building. Therefore, the large majority of customers (91%), can be classified in the category of 1-10 properties.



### 3.2 Rate Areas

	<b>Total*</b> <b>% Respondents</b>	<b>Population</b>
Happy Valley	17.5	13.3
Labrador City	9.1	10.4
Island / Labrador Interconnected	64.7	64.3
Island / Labrador Isolated	12.7	11.8

\* Percentages may sum to greater than 100% as each customer could represent more than one rate area.  
 Don't knows have been removed from the analysis.

- ◆ The profile of customers surveyed is very similar to the overall profile of general service customers, with the majority of respondents representing Island/Labrador Interconnected region (65%).

### 3.3 Years of Service Relationship

	<b>Total</b> <b>(n=278)</b>
Average Number of Years	17.8
Length of relationship:	
1 - 10 years	33.8
11 - 19 years	16.2
20+ years	46.8
Don't Know	3.2

- ◆ Survey respondents report being a customer of Hydro for an average of 18 years, with slightly less than half (47%) indicating they have been a Hydro customer for 20 years or more.

## 4.0 IMPORTANCE & PERFORMANCE RATINGS

Within the survey design, sixteen service attributes were specified upon which to gain a measure of Hydro's performance. This list of service attributes is based upon criterion used by utilities; the Servqual research model; as well as the input of Hydro management. Servqual is a multiple-item instrument for measuring and monitoring service quality, based on five quality dimensions shown to be key to the performance of service companies: tangibles, reliability, responsiveness, assurance, and empathy. The survey attributes included to define these five key dimensions are as follows:

### *Tangibles*

- "Electricity at a reasonable cost"
- "Bills easy to read and understand"

### *Reliability*

- "Able to complete equipment repairs and service right the first time"
- "A reliable, uninterrupted supply of electricity"
- "Billing statement accuracy"

### *Responsiveness*

- "Electricity quickly restored when there is a power outage"
- "Quick response to customer questions and inquiries"
- "Education or information about electricity use"

### *Assurance*

- "Friendly & courteous employees"
- "Concern for public safety"
- "Operates in an environmentally responsible manner"

### *Empathy*

- "A company which has the customer's best interest at heart"
- "Convenient hours of operation"
- "Convenient methods of payment"
- "Easy access to account information at any time"
- "Contributes back to the community through initiatives such as community sponsorship programs"

Customers were first asked to rate the *importance* of any electric company in providing each service attribute (Importance Rating) and secondly, based on the customer's experience, to specifically rate the *performance* of Hydro on providing each attribute (Performance Rating). This report section details customer response toward each individual service attribute.

#### 4.1 Importance Factors

	Rank	Very. Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All Imp.	N/A	Mean
<i>Electricity at a reasonable cost</i>	1	97.7	1.5	1.0	--	--	--	<b>9.90</b>
<i>Electricity quickly restored when there is a power outage</i>	2	96.3	3.7	--	--	--	--	<b>9.89</b>
<i>Able to complete equipment repairs and service right the first time</i>	3	95.6	4.1	--	--	--	--	<b>9.87</b>
<i>Billing statement accuracy</i>	4	95.9	3.7	--	0.3	--	--	<b>9.87</b>
<i>A reliable, uninterrupted supply of electricity</i>	5	95.9	3.3	1.0	--	--	--	<b>9.87</b>
<i>Concern for public safety</i>	6	95.2	4.1	--	--	0.7	--	<b>9.83</b>
<i>Bills easy to read and understand</i>	7	87.8	11.5	0.3	0.3	--	--	<b>9.69</b>
<i>Friendly &amp; courteous employees</i>	8	88.9	9.6	1.5	--	--	--	<b>9.68</b>
<i>A company which has the customer's best interest at heart</i>	9	90.0	7.4	1.1	--	0.3	0.7	<b>9.66</b>
<i>Operates in an environmentally friendly manner</i>	10	88.1	10.0	0.7	--	0.7	0.3	<b>9.66</b>
<i>Quick response to customer questions and inquiries</i>	11	87.8	96.3	1.9	--	--	1.2	<b>9.66</b>
<i>Convenient methods of payment</i>	12	85.9	11.9	1.9	--	--	0.3	<b>9.65</b>
<i>Easy access to account information at any time</i>	13	83.0	14.4	1.5	--	--	1.1	<b>9.56</b>
<i>Convenient hours of operation</i>	14	82.6	13.7	3.0	0.3	--	0.3	<b>9.49</b>
<i>Contributes back to the community</i>	15	73.0	16.7	3.7	0.3	0.7	5.6	<b>9.31</b>
<i>Education or information about electricity use</i>	16	67.0	18.5	10.4	--	1.5	2.6	<b>8.90</b>

- ◆ Overall, general service customers of Hydro consider each of the sixteen service attributes as important with average ratings on each attribute ranging between 8.9 and 9.9.
- ◆ Commercial customers rate the attribute “electricity at a reasonable cost” most important of all the service attributes with 98% of respondents indicating it is “very important” and 2% indicating it is “somewhat important”.
- ◆ “Electricity quickly restored when there is a power outage” ranks second in importance (9.89 mean rating) followed closely by the attributes “able to complete equipment repairs and service right the first time”, “a reliable uninterrupted supply of electricity”, and “billing statement accuracy” (9.87 mean rating).
- ◆ Although rated as important overall, the least important attributes according to Hydro commercial customers are “education or information about electricity use” (67%, “very important”) and “contributes back to the community” (73%, “very important”).

## 4.2 Performance Evaluation

	Rank	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>Concern for public safety</i>	1	72.2	21.5	0.7	--	0.7	4.8	<b>9.26</b>
<i>Friendly &amp; courteous employees</i>	2	74.1	21.9	2.6	0.3	0.3	0.7	<b>9.19</b>
<i>Billing Statement Accuracy</i>	3	76.3	14.8	5.2	0.7	1.9	1.1	<b>9.12</b>
<i>Bills easy to read and understand</i>	4	75.6	17.8	5.2	0.3	0.7	0.3	<b>9.12</b>
<i>Convenient methods of payment</i>	5	74.4	18.5	4.8	--	1.9	0.3	<b>9.10</b>
<i>Operates in an environmentally friendly manner</i>	6	57.4	27.8	3.0	0.7	0.3	10.7	<b>8.95</b>
<i>Easy access to account information at any time</i>	7	58.3	24.4	4.8	0.3	0.7	11.1	<b>8.93</b>
<i>Able to complete equipment repairs and service right the first time</i>	8	56.7	27.8	4.8	0.3	--	10.3	<b>8.87</b>
<i>Convenient hours of operation</i>	9	60.0	27.4	5.6	1.1	0.7	5.2	<b>8.81</b>
<i>Quick response to customer questions and inquiries</i>	10	50.4	26.7	7.8	3.0	0.3	11.9	<b>8.53</b>
<i>A reliable, uninterrupted supply of electricity</i>	11	53.0	33.7	10.7	1.1	1.5	--	<b>8.43</b>
<i>Electricity quickly restored when there is a power outage</i>	12	48.1	38.5	8.9	2.6	1.5	0.3	<b>8.29</b>
<i>Education or information about electricity use</i>	13	36.7	33.3	13.3	2.2	2.2	12.2	<b>7.97</b>
<i>A company which has the customer's best interest at heart</i>	14	34.1	38.9	17.0	1.5	3.0	5.6	<b>7.74</b>
<i>Electricity at a reasonable cost</i>	15	21.5	34.8	25.9	7.0	9.3	1.5	<b>6.60</b>
<i>Contributes back to the community</i>	16	11.9	13.3	17.8	3.7	11.9	41.5	<b>5.85</b>

- ◆ Although not as consistently rated as importance, performance ratings for each of the sixteen service attributes were fairly high, with mean performance scores ranging from 5.85 to 9.26. Customers rate Hydro most favourable on the attribute “concern for public safety”, with most (72%) rating Hydro as “excellent” in the delivery of this service.
- ◆ According to general service customers, Hydro performs well in the category of “friendly and courteous employees” with 74% of customers rating it as “excellent” and 22% rating it as “good”.
- ◆ Hydro performs most negatively on its contribution back to the community (mean rating 5.85). Overall, 42% of general service customers are unaware of Hydro’s activity in this area, and of those aware of any initiatives, only 12% rate Hydro as “excellent” on this issue.
- ◆ Hydro ranks second to last on its delivery of electricity at a reasonable cost. Fewer than one-quarter of respondents (22%) rate Hydro’s performance as “excellent” and 16% rate Hydro as either “poor” or “very poor” on this attribute.

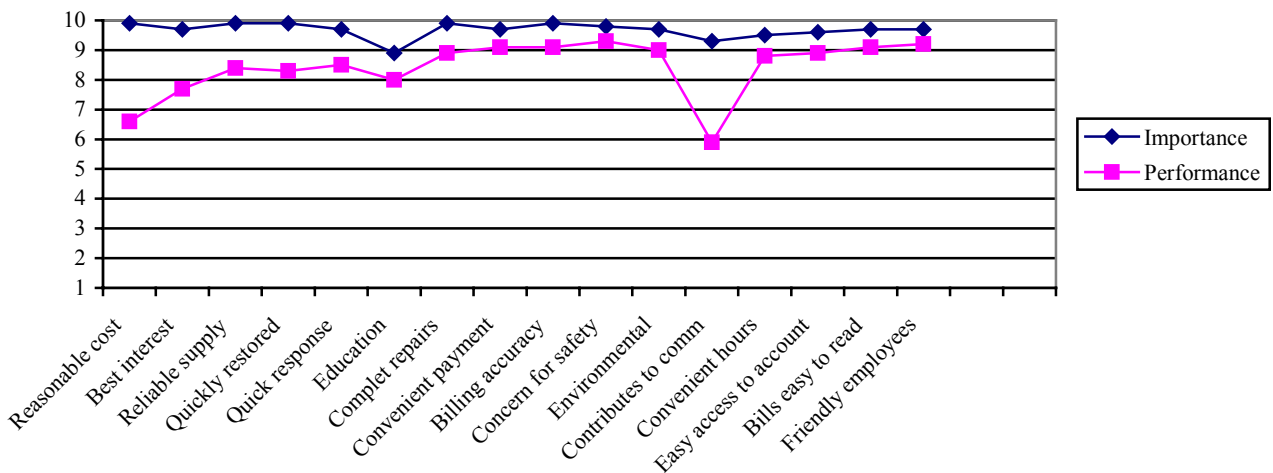
## 5.0 SERVICE GAP ANALYSIS

### 5.1 “Gap” on Specific Service Attributes

Comparing the importance ratings on each service attribute to the performance evaluation of Hydro on these attributes, an average “gap” score is calculated. Essentially, this is the difference between customer perception and expectation on each service attribute. A negative gap score represents lower-than-expected service, that is, the company’s performance is not meeting the service level desired by customers. A gap score of 2.0 or greater should be considered significant.

	IMPORTANCE		PERFORMANCE		Mean Gap Rating
	Mean Rating	Rank	Mean Rating	Rank	
<i>Electricity at a reasonable cost</i>	<b>9.90</b>	1	<b>6.60</b>	15	<b>-3.32</b>
<i>Contributes back to the community</i>	<b>9.31</b>	15	<b>5.85</b>	16	<b>-3.28</b>
<i>A company which has the customer’s best interest at heart</i>	<b>9.66</b>	9	<b>7.74</b>	14	<b>-1.91</b>
<i>Electricity quickly restored when there is a power outage</i>	<b>9.89</b>	2	<b>8.29</b>	12	<b>-1.60</b>
<i>A reliable, uninterrupted supply of electricity</i>	<b>9.87</b>	5	<b>8.43</b>	11	<b>-1.44</b>
<i>Quick response to customer questions and inquiries</i>	<b>9.66</b>	11	<b>8.53</b>	10	<b>-1.08</b>
<i>Education or information about electricity use</i>	<b>8.90</b>	16	<b>7.97</b>	13	<b>-0.99</b>
<i>Able to complete equipment repairs and service right the first time</i>	<b>9.87</b>	3	<b>8.87</b>	8	<b>-0.98</b>
<i>Billing Statement Accuracy</i>	<b>9.87</b>	4	<b>9.12</b>	3	<b>-0.84</b>
<i>Convenient hours of operation</i>	<b>9.49</b>	14	<b>8.81</b>	9	<b>-0.71</b>
<i>Operates in an environmentally friendly manner</i>	<b>9.66</b>	10	<b>8.95</b>	6	<b>-0.68</b>
<i>Easy access to account information at any time</i>	<b>9.56</b>	13	<b>8.93</b>	7	<b>-0.68</b>
<i>Bills easy to read and understand</i>	<b>9.69</b>	7	<b>9.12</b>	4	<b>-0.58</b>
<i>Convenient methods of payment</i>	<b>9.65</b>	12	<b>9.10</b>	5	<b>-0.55</b>
<i>Concern for Public Safety</i>	<b>9.83</b>	6	<b>9.26</b>	1	<b>-0.56</b>
<i>Friendly &amp; courteous employees</i>	<b>9.68</b>	8	<b>9.19</b>	2	<b>-0.49</b>

### “Gap” in Importance Vs. Performance Total Customer Base



- ◆ As demonstrated in the graph above, Hydro’s performance falls below the overall expectations of its customers on each of the sixteen service attributes (gap scores range from -.49 to -3.32).
- ◆ The greatest gap exists with the attribute “electricity at a reasonable cost” with mean importance ratings for this attribute exceeding mean performance ratings by 3.32 points. Customers also rate Hydro below expectations on the attribute “contributes back to the community” with a negative gap score of 3.28 points occurring between importance and performance.
- ◆ A negative gap score of -1.91 exists for the attribute “a company which has the customers best interest at heart” suggesting that Hydro is not meeting customer expectations on this service attribute.
- ◆ Hydro comes closest to meeting customers’ expectations on the attribute “friendly and courteous employees” with importance scores exceeding performance scores by only .49 basis points.

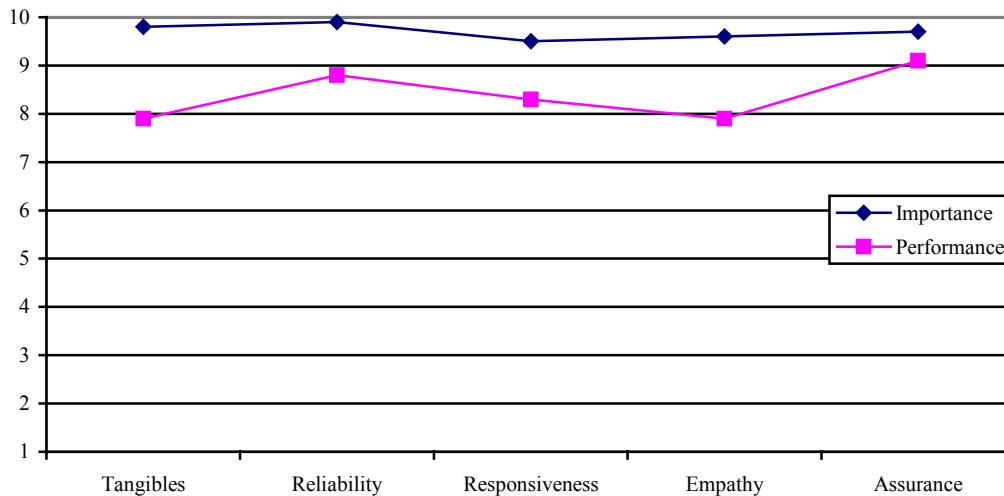


## 5.2 “Gap” on Key Service Dimensions

To evaluate overall performance in general, the individual service attributes are grouped to represent the five key service quality dimensions. “Service Gaps” or differences between customer expectation and perceived performance of Hydro are then calculated as an overall measure of performance in relation to customer needs.

	IMPORTANCE		PERFORMANCE		Mean Gap Rating
	Mean Rating	Rank	Mean Rating	Rank	
<i>Tangibles</i>	9.79	2	7.86	5	-1.95
<i>Empathy</i>	9.55	4	7.92	4	-1.54
<i>Responsiveness</i>	9.49	5	8.27	3	-1.20
<i>Reliability</i>	9.88	1	8.75	2	-1.11
<i>Assurance</i>	9.72	3	9.14	1	-0.56

“Gap” in Importance Vs. Performance



- ◆ Examining the key service dimensions, the largest negative gap in service provision occurs with the dimension “tangibles” (includes attributes “bills easy to read and understand” and “electricity at a reasonable cost”) with a gap score of -1.95 points.

- ◆ Second to this, Hydro is not meeting the service expectations of customers with respect to reliability. A negative gap of 1.11 points exists between customers' rating of importance and overall performance.
- ◆ Hydro's performance most closely matches customer expectation with respect to the key dimension of assurance with the performance score for this attribute (9.14) falling only slightly below importance scores (9.72).

## 6.0 SERVICE RELIABILITY

### 6.1 Overall Satisfaction with Service Reliability

On a scale of 1 to 10, with a 1 meaning "Very Dissatisfied" and a 10 meaning "Very Satisfied", how satisfied are you with: the supply of electricity you receive from NF & Lab. Hydro

	<b>Total (n=278)*</b>
Very Satisfied	60.0
Somewhat Satisfied	33.5
Neutral	5.0
Somewhat Dissatisfied	0.8
Very Dissatisfied	0.4
Mean Rating	8.81
Exceeded Expectations	5.4
Met Expectations	92.8
Have Not Met Expectations	1.8

\* For eight of the companies contacted, the individuals responsible for billings and customer service were not the same..

- ◆ Most customers express a high level of satisfaction with the supply of electricity they receive from Newfoundland and Labrador Hydro with 94% of customers indicating they are either "somewhat" (60%) or "very" (34%) satisfied.
- ◆ For the most part, Hydro has met (93%), but has not exceeded customer expectations with respect to their supply of electricity. Only 5% of general service customer report that Hydro has out-performed their expectation of service. These findings confirm that opportunities exist for Hydro to improve its performance in the area of service reliability.

### 6.2 Gap

	<b>Mean Importance Rating</b>	<b>Mean Performance</b>	<b>Mean Gap Rating</b>
<i>A reliable, uninterrupted supply of electricity</i>	9.87	8.43	-1.44
<i>Electricity quickly restored when there is a power outage</i>	9.89	8.29	-1.60

- ◆ As evaluated by customers, the service reliability of Hydro does not meet the expectations of its customers. That is, a “gap” is found to exist when comparing the rated performance of Hydro against the rated importance of reliable service attributes.
- ◆ An average gap of -1.4 points occurs when customers rate Hydro’s performance on the attribute “reliable, uninterrupted supply of electricity” against the attributes overall importance. Similarly, an average gap of -1.6 exists for expectations of Hydro’s performance on the attribute “electricity quickly restored when there is a power outage”.

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## 7.0 CUSTOMER SERVICE

### 7.1 Overall Satisfaction with Customer Service

*On a scale of 1 to 10, with a 1 meaning “Very Dissatisfied” and a 10 meaning “Very Satisfied”, how satisfied are you with: the overall customer service you receive from NF & Lab. Hydro*

	<b>Total (n=278)</b>
Very Satisfied	62.6
Somewhat Satisfied	30.9
Neutral	5.0
Somewhat Dissatisfied	--
Very Dissatisfied	0.4
Don’t Know	1.1
Mean Rating	8.90
Exceeded Expectations	2.5
Met Expectations	94.2
Have Not Met Expectations	3.2

*\* For eight of the companies contacted, the individuals responsible for billings and customer service were not the same..*

- ◆ The majority of customers are satisfied with the customer service they receive from Hydro. Approximately, 31% of customers are “somewhat satisfied” and 63% are “very satisfied” with less than 1% of consumers indicating they are “very dissatisfied”.
- ◆ For the most part, Hydro met the expectations of its customers (94%) with approximately 3% of customers indicating that the level of customer service provided by Hydro exceeds their expectations. Only 3% of customers indicate that Hydro has not met their expectations.

## **8.0 BILLING**

### **8.1 Satisfaction with Content of Monthly Electric Bill**

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>Overall layout of the bill</i>	58.2	35.9	4.5	0.4	0.7	0.4	<b>8.84</b>
<i>Explanation of Electricity Usage</i>	57.1	30.8	8.5	1.8	0.7	1.1	<b>8.63</b>
<i>Explanation of current account balance</i>	73.7	21.9	2.3	0.4	1.1	0.7	<b>9.17</b>
<i>Overall content of the bill</i>	66.0	28.2	3.3	1.1	0.7	0.7	<b>8.97</b>
<i>Company contact information for inquiries and questions</i>	60.4	25.9	4.8	2.2	--	6.7	<b>8.86</b>

- ◆ Overall, customers are satisfied with most components of their monthly electric bill. This is reflected in the mean satisfaction ratings, which ranged between 8.8 and 9.2.
- ◆ Customers are most satisfied with the explanation provided about their current account balance with 74% of respondents rating this service as “excellent” (mean rating of 9.2). Satisfaction levels were also high for “overall content of the bill” with 94% of respondents rating this attribute positively (66% “excellent” and 28% “very good”).
- ◆ Customers express the lowest level of satisfaction with the explanation of electricity usage displayed on their bill. Although 57% of customers rated hydro as “excellent” the remaining 43% are less than completely satisfied on this point.
- ◆ Although a high level of satisfaction was expressed overall, there is still room for Hydro to improve on the content of its bills with between 26% and 43% customers rating Hydro as less than excellent on each of the billing components.

## 8.2 *Suggested Improvements to Monthly Bill*

- ◆ For the most part, general service customers are satisfied with the type of information contained on their current monthly electricity bill (91%).
- ◆ A small proportion of commercial customers (9%) identify suggestions for improvement of their electric bill. Suggestions include:
  - Include previous year/month electricity consumption (2%);
  - Simpler layout/easy to understand calculations (2%);
  - All meters/companies on same bill (1%);
  - Identify if more electricity used than previous month (1%); and
  - Other mentions (3%).

## **APPENDIX A: SURVEY INSTRUMENT**

**Commercial Customer Satisfaction Survey  
(October 2001)**

Hello, my name is \_\_\_\_\_ from Market Quest Research, a professional marketing research firm. Today we are conducting a short survey on commercial electricity. May I please speak to the individual in your organization who is primarily responsible for dealing with the electric company **[REPEAT INTRO IF NECESSARY]**.

We would appreciate your participation, would you have a few minutes to complete the survey? ...it will take approximately 5 minutes of your time.

**YES - CONTINUE**  
**NO - THANK & TERMINATE**

**Screener:**

1a. What is the name of the electric company which....

	<i>NF &amp; LAB. HYDRO</i>	<i>NF POWER</i>	<i>D/K OR N/A</i>
<i>... Supplies electricity to the properties owned or operated by your company or organization</i>	<b>1</b>	<b>2</b>	<b>3</b>

*IF NF & LAB HYDRO NOT MENTIONED- THANK & TERMINATE*

1b. Are you the representative of your company/organization who is responsible for dealing with NF Hydro on bill payments:

**Yes**    **No**  
1        2

*IF YES, CONTINUE*

**IF NO:** Who in your organization is responsible for dealing with NF Hydro on bill payments?

NAME \_\_\_\_\_ pH \_\_\_\_\_

**CONTINUE**

1c. Are you the representative of your company/organization who is responsible for dealing with NF Hydro on Customer Service Issues:

**Yes**    **No**  
1        2

**IF YES, CONTINUE**



**IF NO**, Who in your organization is responsible for dealing with NF Hydro on customer service issues?

NAME \_\_\_\_\_ pH \_\_\_\_\_

**IF YES TO Q1B & Q1C- CONTINUE**

**IF YES TO Q1B & NO TO Q1C GO TO Q3**

**IF NO TO Q1B & YES TO Q1C GO TO Q4**

**IF NO TO BOTH- GET CONTACT INFO FOR APPROPRIATE INDIVIDUAL- THANK AND TERMINATE**

2. We are conducting this survey on behalf of NF & Labrador Hydro to measure customer satisfaction and identify ways to improve the service they offer you as a commercial customer. Your company has been randomly selected to participate in this survey. When answering these questions, please refer to the service provided to you as a commercial customer. The information you provide is confidential and will be analyzed with all other responses. Since the accuracy of the study depends on your answers, I would like to ask you to be honest in your response, whether good or bad.

2a. Before we talk specifically about NF & Lab. Hydro, please think about electric companies in general, and about what is important for any electric company to provide your company. Using a scale of 1 to 10 where 1 means “Not At All Important” and 10 means “Extremely Important”, please rate the importance of: **[READ LIST]**

	Not At All Imp.							Extremely Imp.			D/K
	1	2	3	4	5	6	7	8	9	10	11
A reliable, uninterrupted supply of electricity											
Electricity at a reasonable cost											
Electricity quickly restored when there is a power outage											
Bills easy to read and understand											
Billing statement accuracy											
Quick response to customer questions and inquiries											

	Not At All Imp.										Extremely Imp.	D/K
	1	2	3	4	5	6	7	8	9	10	11	
Convenient hours of operation	1	2	3	4	5	6	7	8	9	10	11	
Easy access to account information at any time	1	2	3	4	5	6	7	8	9	10	11	
Able to complete equipment repairs and service right the first time	1	2	3	4	5	6	7	8	9	10	11	
Education or information about electricity use	1	2	3	4	5	6	7	8	9	10	11	
Friendly & courteous employees	1	2	3	4	5	6	7	8	9	10	11	
A company which has the customer's best interest at heart	1	2	3	4	5	6	7	8	9	10	11	
Convenient methods of payment	1	2	3	4	5	6	7	8	9	10	11	
Operates in an environmentally responsible manner	1	2	3	4	5	6	7	8	9	10	11	
Concern for public safety	1	2	3	4	5	6	7	8	9	10	11	
Contributes back to the community through initiatives such as community sponsorship programs	1	2	3	4	5	6	7	8	9	10	11	

2b. Now think specifically about the service, which you currently receive from NF & Labrador Hydro. Based on your experienced to date and using a scale of 1 to 10 where 1 means "Very Poor" and 10 means "Excellent"... please rate the performance of NF & Labrador Hydro in providing you: **[READ LIST]**

	Very Poor										Excellent	D/K
	1	2	3	4	5	6	7	8	9	10	11	
A reliable, uninterrupted supply of electricity	1	2	3	4	5	6	7	8	9	10	11	
Electricity at a reasonable cost	1	2	3	4	5	6	7	8	9	10	11	
Electricity quickly restored when there is a power outage	1	2	3	4	5	6	7	8	9	10	11	
Bills easy to read and understand	1	2	3	4	5	6	7	8	9	10	11	

	Very Poor										Excellent	D/K
	1	2	3	4	5	6	7	8	9	10	11	
Billing statement accuracy	1	2	3	4	5	6	7	8	9	10	11	
Quick response to customer questions and inquiries	1	2	3	4	5	6	7	8	9	10	11	
Convenient hours of operation	1	2	3	4	5	6	7	8	9	10	11	
Easy access to account information at any time	1	2	3	4	5	6	7	8	9	10	11	
Able to complete equipment repairs and service right the first time	1	2	3	4	5	6	7	8	9	10	11	
Education or information about electricity use	1	2	3	4	5	6	7	8	9	10	11	
Friendly & courteous employees	1	2	3	4	5	6	7	8	9	10	11	
A company which has the customer's best interest at heart	1	2	3	4	5	6	7	8	9	10	11	
Convenient methods of payment	1	2	3	4	5	6	7	8	9	10	11	
Operates in an environmentally responsible manner	1	2	3	4	5	6	7	8	9	10	11	
Concern for public safety	1	2	3	4	5	6	7	8	9	10	11	
Contributes back to the community through initiatives such as community sponsorship programs	1	2	3	4	5	6	7	8	9	10	11	

2c. Now think specifically about the content of your electric bill, which you receive from NF & Labrador Hydro. Using a scale of 1 to 10 where 1 means "Very Poor" and 10 means "Excellent"... please rate the monthly electric bill that your company receives from NF and Lab. Hydro on each of the following: **[READ LIST]**

	Very Poor										Excellent	D/K
	1	2	3	4	5	6	7	8	9	10	11	
Overall layout of the bill	1	2	3	4	5	6	7	8	9	10	11	
Explanation of electricity usage	1	2	3	4	5	6	7	8	9	10	11	
Explanation of current account balance	1	2	3	4	5	6	7	8	9	10	11	
Overall content of the bill	1	2	3	4	5	6	7	8	9	10	11	

	Very Poor										Excellent	D/K
	1	2	3	4	5	6	7	8	9	10	11	
Company contact information for inquires and questions												

2d. In addition to payment information such as previous and current balance, your monthly commercial bill from NF and Lab. Hydro includes details such as total electricity usage, meter readings and cost information. Is there any additional information you would like to see added to the monthly electric bill your company receives from NF and Lab. Hydro?

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**GO TO QUESTION 7**

3. We are conducting this survey on behalf of NF & Labrador Hydro to measure customer satisfaction and identify ways to improve the service they offer you as a commercial customer. Your company has been randomly selected to participate in this survey. When answering these questions, please refer to the service provided to you as a commercial customer. The information you provide is confidential and will be analyzed with all other responses. Since the accuracy of the study depends on your answers, I would like to ask you to be honest in your response, whether good or bad.

3a. Before we talk specifically about NF & Lab. Hydro, please think about electric companies in general, and about what is important for any electric company to provide your company. Using a scale of 1 to 10 where 1 means “Not At All Important” and 10 means “Extremely Important”, please rate the importance of: **[READ LIST]**

	Not At All Imp.										Extremely Imp.	D/K
	1	2	3	4	5	6	7	8	9	10	11	
Electricity at a reasonable cost												
Bills easy to read and understand												
Billing statement accuracy												
Easy access to account information at any time												
Convenient methods of payment												

- 3b. Now think specifically about the service, which you currently receive from NF & Labrador Hydro. Based on your experience to date and using a scale of 1 to 10 where 1 means “Very Poor” and 10 means “Excellent”... please rate the performance of NF & Labrador Hydro in providing you: **[READ LIST]**

	Very Poor										Excellent	D/K
Electricity at a reasonable cost	1	2	3	4	5	6	7	8	9	10	11	
Bills easy to read and understand	1	2	3	4	5	6	7	8	9	10	11	
Billing statement accuracy	1	2	3	4	5	6	7	8	9	10	11	
Easy access to account information at any time	1	2	3	4	5	6	7	8	9	10	11	
Convenient methods of payment	1	2	3	4	5	6	7	8	9	10	11	

4. Now think specifically about the content of your electric bill, which you receive from NF & Labrador Hydro. Using a scale of 1 to 10 where 1 means “Very Poor” and 10 means “Excellent”... please rate your company’s monthly electric bill on each of the following: **[READ LIST]**

	Very Poor										Excellent	D/K
Overall layout of the bill	1	2	3	4	5	6	7	8	9	10	11	
Explanation of electricity usage	1	2	3	4	5	6	7	8	9	10	11	
Explanation of current account balance	1	2	3	4	5	6	7	8	9	10	11	
Overall content of the bill	1	2	3	4	5	6	7	8	9	10	11	
Company contact information for inquires and questions	1	2	3	4	5	6	7	8	9	10	11	

5. In addition to payment information such as previous and current balance, your monthly commercial bill from NF and Lab. Hydro includes details such as total electricity usage, meter readings and cost information. Is there any additional information you would like to see added to the monthly electric bill your company receives from NF and Lab. Hydro?

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**GOTO QUESTION 7**

6. We are conducting this survey on behalf of NF & Labrador Hydro to measure customer satisfaction and identify ways to improve the service they offer you as a commercial customer. Your company has been randomly selected to participate in this survey. When answering these questions, please refer to the service provided to you as a commercial customer. The information you provide is confidential and will be analyzed with all other responses. Since the accuracy of the study depends on your answers, I would like to ask you to be honest in your response, whether good or bad.

6a. Before we talk specifically about NF & Lab. Hydro, please think about electric companies in general, and about what is important for any electric company to provide your company. Using a scale of 1 to 10 where 1 means “Not At All Important” and 10 means “Extremely Important”, please rate the importance of: [READ LIST]

	Not At All Imp.										Extremely Imp.	D/K
	1	2	3	4	5	6	7	8	9	10	11	
A reliable, uninterrupted supply of electricity												
Electricity quickly restored when there is a power outage	1	2	3	4	5	6	7	8	9	10	11	
Quick response to customer questions and inquiries	1	2	3	4	5	6	7	8	9	10	11	
Convenient hours of operation	1	2	3	4	5	6	7	8	9	10	11	
Able to complete equipment repairs and service right the first time	1	2	3	4	5	6	7	8	9	10	11	
Education or information about electricity use	1	2	3	4	5	6	7	8	9	10	11	
Friendly & courteous employees	1	2	3	4	5	6	7	8	9	10	11	
A company which has the customer’s best interest at heart	1	2	3	4	5	6	7	8	9	10	11	
Operates in an environmentally responsible manner	1	2	3	4	5	6	7	8	9	10	11	
Concern for public safety	1	2	3	4	5	6	7	8	9	10	11	
Contributes back to the community through initiatives such as community sponsorship programs	1	2	3	4	5	6	7	8	9	10	11	

6b. Now think specifically about the service, which you currently receive from NF & Labrador Hydro. Based on your experienced to date and using a scale of 1 to 10 where 1 means “Very Poor” and 10 means “Excellent”... please rate the performance of NF & Labrador Hydro in providing you: **[READ LIST]**

	Very Poor										Excellent	D/K
	1	2	3	4	5	6	7	8	9	10	11	
A reliable, uninterrupted supply of electricity												
Electricity quickly restored when there is a power outage												
Quick response to customer questions and inquiries												
Convenient hours of operation												
Able to complete equipment repairs and service right the first time												
Education or information about electricity use												
Friendly & courteous employees												
A company which has the customer’s best interest at heart												
Operates in an environmentally responsible manner												
Concern for public safety												
Contributes back to the community through initiatives such as community sponsorship programs												

## GOTO QUESTION 7

### GENERAL

7. Now please think of electric companies as serving customers in two ways: (1) the first, being the supply of electricity to your commercial property and (2) the second being, customer service or response to customer needs, such as hook-ups, repairs, account billings and inquiries. On a scale of 1 to 10, with a 1 meaning “Very Dissatisfied” and a 10 meaning “Very Satisfied”, how satisfied are you with: **[READ LIST]**

	Very Dissat.										Very Sat.		D/K
The <u>supply of electricity</u> you receive from NF & Lab. Hydro	1	2	3	4	5	6	7	8	9	10	11		
The overall <u>customer service</u> you receive from NF & Lab. Hydro	1	2	3	4	5	6	7	8	9	10	11		

8. Which of the following statements best describes... [READ LIST]

	Have not met my expectations	Met my expectations	Exceeded my expectations
The <u>supply of electricity</u> you receive from NF & Lab. Hydro	1	2	3
The overall <u>customer service</u> you receive from NF & Lab. Hydro	1	2	3

## DEMOGRAPHICS

*Now just some final questions for classification purposes only....*

9. For approximately how many years has your company been a customer of NF & Lab. Hydro? \_\_\_\_\_ years

10. In which industry does your company operate? \_\_\_\_\_

11. To how many properties/buildings owned by your company does NF Hydro supply electricity?  
 \_\_\_\_\_

**IF ONE- GO TO Q14**

12. Are these properties/buildings.....

- ...located in the same community 1 -GO TO Q14
- ...located in different communities 2 -CONTINUE

13. In how many different communities are the properties/buildings located?  
 \_\_\_\_\_

**IF FIVE OR LESS- CONTINUE, ELSE GO TO END**



14. In what community/communities are the properties/buildings located?

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Before we finish, I would like to inform you that you may receive a quality control check. My supervisor calls back 10% of all my completed surveys just to ensure that you were comfortable participating and that I was doing my job correctly

I would like to thank you for your participation, your assistance is greatly appreciated. Have a good day/evening!

**INTERVIEWER USE ONLY:**

Gender:		Region:		Sections Done:	
Male	1	Happy Valley	1	Question 2	1
Female	2	Lab City	2	Question 3	2
		Island/Lab	3	Question 4	3
		Interconnected			
		Island/Lab Isolated	4		
		Other	5		

Company Name: \_\_\_\_\_

Interviewer: \_\_\_\_\_ Date: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Data Entry: \_\_\_\_\_ Quality Control: \_\_\_\_\_



