

# 2001 CUSTOMER SATISFACTION RESEARCH TRACKING STUDY

## FINAL REPORT

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## **1.0 STUDY BACKGROUND AND METHODOLOGY**

### **1.1 *Study Background***

During November 1999, Market Quest Research designed and completed a Baseline Residential Customer Satisfaction Study on behalf of Newfoundland & Labrador Hydro (Hydro). This study measured the performance of Hydro in providing customer service and provided for baselines against which to compare future company performance. Service quality or performance was measured to determine how well Hydro's service delivery matches customer expectations.

This report represents the results of the second annual tracking study (2001 Customer Satisfaction Research) conducted during early October 2001. This annual tracking study was undertaken to identify any changes in consumer attitudes towards importance of specific attributes of service and to measure the quality of service delivered to residential customers.

### **1.2 *Study Methodology***

The methodology of this tracking study mirrored the 1999 Baseline and 2000 Tracking Study and consisted of a quantitative telephone survey. A shorter version of the baseline questionnaire was utilized (Appendix A) and completed with a similar sampling of Newfoundland & Labrador Hydro residential customers. The sampling frame included all households within Hydro's service area that identified Hydro as their supplier of electricity. The sampling unit was selected to be an adult member of the household primarily responsible for paying the home electric bill and dealing with Hydro. A total of 654 completed surveys were collected for the 2001 Tracking study, providing an overall study margin of error :  $\pm 3.8\%$ , 19 times out of 20 or at the 95% confidence level.

In both the baseline and tracking studies, the following seven regions of the province were sampled for inclusion:

- Labrador City/Wabush
- Happy Valley/Goose Bay
- Labrador Isolated Areas
- Northern Interconnected Areas
- Northern Isolated Areas
- Central Interconnected Areas
- Central Isolated Areas

Disproportionate sampling was used to draw a subsample from each of these regions (that is, the sample does not represent the true population proportions in each region.)

All data collection was completed in-house by Market Quest Research trained interviewing staff from September 26<sup>th</sup> – October 10<sup>th</sup>. A senior supervisor monitored data collection, and a minimum 10% quality control check was conducted on all completed surveys. Following data collection, surveys were 100% edited and coded by a research assistant prior to data entry. The SPSS statistical package was utilized for all data entry and analysis.

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### 1.3 *This Report*

This report profiles the total sample population for the 2001 Tracking study with comparisons between the November 2000 tracking data and the November 1999 baseline data. All data is segmented by the three main service areas (Northern, Central, Labrador), and where informational value is added, data is crosstabulated by all seven sub regions. Also, survey data has been analyzed by demographics (age, income, education, employment status and gender).

Since this study used disproportionate sampling to allow a profile of all seven subregions, survey data at the total market level is weighted to reflect correct population proportions in these regions.

In order to note differences in comparing the 1999/2000/2001 data, statistical tests of significance have been completed at the 90% confidence level. Essentially, when comparing percentages drawn from different populations, a statistical test of proportions will guide us to be confident that any apparent difference between the two percentages is “statistically real” or “significant”. (What may seem to be a difference between percentages may simply be the result of sampling error or the margin of error associated with the sample size and not a real or significant difference in the study results). Throughout this report, where a “significant” difference exists between two or more percentages, the percentages are marked (\* or †) or highlighted with a darker shading. Where this occurs, we can say that we are 90% confident that the difference between the percentages in question are “significant” or real and not simply due to uncontrollable sampling error. (See Appendix B for a more complete explanation).

## **2.0 SUMMARY OF KEY FINDINGS**

*In 2001, the customer satisfaction rating for Newfoundland and Labrador Hydro is 96%.*

- ◆ Overall, 96% of Hydro customers are very (76%) or somewhat (20%) satisfied with the level of customer service provided by Hydro. Hydro customers in 2001 are significantly more likely to rate themselves as “very satisfied” on this issue, as compared to 2000 (65%).
- ◆ When examined by region, the satisfaction rating for Central is 97%, Northern is 94% and Labrador is 91%.

*The Customer Service Index (CSI) for Newfoundland and Labrador Hydro is 7.9 out of 10 for November 2001. The CSI has risen slightly compared to 2000 when the CSI was 7.6 .*

- ◆ This year, the CSI for Hydro has increased to 7.9 out of 10. This is most likely attributable to a slight increase in rated performance of the service attributes measured in the 2001 study, as well as the positive impact of the two newly measured attributes.
- ◆ At the regional level, the CSI is lower in Labrador at 7.4 and slightly higher in the Central (8.1) and Northern regions (8.3).

*Importance and performance ratings for each of the sixteen attributes remain high in 2001.*

- ◆ Hydro customers rate each of the service attributes as either somewhat important or very important (ranged from 86% to 100%) and also, for the most part, ranked Hydro’s performance on each of the attributes positively (average performance ratings ranged from 6.8 to 9.3). Importance and performance ratings for each of the fourteen attributes measured in the 2000 and 2001 studies have marginally increased.
- ◆ Hydro customers express a high level of satisfaction with both of the newly measured attributes, “bills easy to read and understand”, and “billing statement accuracy”.

*Over the last year, the percentage of customers with access to the Internet has remained constant at 43%.*

- ◆ When examined by access point, access at school has shown only a slight increase whereas access at home has increased significantly (23% in 2000 to 31% in 2001).
- ◆ Internet access among Hydro customers in the Northern region appears to have decreased in 2001 (43% in 2000 and 34% in 2001). Access in the Central and Labrador regions has remained consistent with 2000 findings (41% and 63%, respectively).

***A segment of Hydro customers with access to the Internet are receptive to using on-line banking services.***

- ◆ Of those Hydro customers who have access to the Internet, almost half said they would likely or definitely use the Internet to view account balances (45%), view account history (48%) or view bill payment options (43%). Approximately one-third would definitely or likely use the Internet to make bill payments (35%).

***Almost half (49%) of Hydro customers indicated they would likely or definitely use an equal payment plan if it were available. A lesser number of respondents (36%) said they would definitely or likely use a pre-authorized payment plan.***

- ◆ Respondents from Labrador are more likely to indicate they would “definitely” use a pre-authorized payment plan than those would in other regions.

***Complete satisfaction with the level of customer service provided by Hydro remains low.***

- ◆ Only 3% of Hydro customers indicate that the provision of customer service by Hydro exceeds their expectations, a decline from previous studies. For the most part, customers report that the customer service meets their expectations (90%).
- ◆ One quarter of the customer base (24%) remain less than completely satisfied with the level of customer service they receive from Hydro.

***Hydro customers' satisfaction with service reliability appears to be increasing steadily since 1999. However, one quarter of customers continue to be less than extremely satisfied with the supply of electricity.***

- ◆ Compared to past years, Hydro customers are more likely to indicate they are “very satisfied” with their supply of electricity (75% in 2001 from 67% in 1999) . With the exception of the Northern region where the percentage of customers rating themselves as “very satisfied” has increased, ratings of “very satisfied” with service reliability have remained fairly constant within each of the remaining regions.
- ◆ Fewer than 4% of Hydro customers indicate that Hydro exceeds their expectations with regards to service reliability.

***Negative gaps in service performance continue to be evident within the 2001 Tracking Study. That is, perceptions of Hydro's performance continue to be lower than customer expectations on each of the sixteen service attributes.***

- ◆ Consistent since 1999, Hydro does not meet customer expectations on the attribute “electricity at a reasonable cost” (2.9 points below expectations in 1999, 2000 and 2001).

- ◆ The service gap associated with the dimension of responsiveness, or Hydro’s willingness to help customers and provide prompt service, has widened in 2001. Last year, responsiveness fell 1.0 points below expectations, this year falling short by 1.2 percentage points.
- ◆ An improvement in gap rating is evident for the tangibles dimension, with the gap narrowing this year to 1.7 basis points below customer expectations (-2.9 gap in 1999 and 2000). This improvement is most likely attributable to the high performance evaluation of the newly measured attribute, “bills easy to read and understand”.
- ◆ In 2001, Hydro comes closest to meeting customer expectations on the attribute “bills easy to read and understand” with mean performance ratings falling just -0.4 below those of importance.

*The demographic profile of 2001 respondents is similar to that of respondents in 1999 and 2000 suggesting that there has not been any significant demographic shift in the profile of Hydro residential customers.*



### 3.0 PROFILE OF SURVEY RESPONDENTS

This report section profiles the demographic characteristics of survey respondents as compared to the provincial population and segments respondents by region, interconnected and isolated service areas.

#### 3.1 Demographic Characteristics - 2001

	Respondents (n=654)	Population <sup>1</sup>
<b>AGE:</b>		
18-24	1.20	14.0
25-34	19.4	20.8
35-44	27.5	21.9
45-54	24.2	18.1
55-64	16.5	10.7
65+	11.1	14.3
<b>EDUCATION:</b>		
Elementary School	16.3	17.5
Some High School	28.9	27.9
Graduated High School	27.0	9.8
Voc/Tech College	12.5	25.9
Some University	3.8	10.7
Graduated University	11.6	8.8
<b>INCOME CATEGORY:</b>		
\$20,000 and under	40.1	23.4
\$20,001 to \$40,000	34.6	31.8
\$40,001 to \$60,000	12.6	21.7
\$60,001 to \$80,000	7.9	12.8
\$80,001 and over	4.9	10.2
<b>EMPLOYMENT CATEGORY:</b>		
Full-time	29.4	50.5
Part-time/Seasonal	31.9	12.4
Unemployed/Retraining	8.4	15.4
Homemaker	14.4	--
Retired	15.6	14.3
<b>GENDER:</b>		
Male	31.5	49.9
Female	68.5	50.1

<sup>1</sup> -Stats Canada 1996 Census data.

Note: Refusals are excluded from the analysis.

- ◆ Compared to the provincial population, Hydro customers are more likely to have graduated from high school (27%), to work on a part time/seasonal basis (32%) and to earn a household income of \$40,000 or less (75%). Hydro customers are less likely to be between the ages of 18 and 24 (1%) and to have attended technical college (13%). These demographic differences may be attributable to the rural location of Hydro customers and the overall composition of the rural population.

- ◆ Similar to the 1999 and 2000 studies, females in the household are most often responsible for paying the home electric bill (66% in 1999, 60% in 2000 and 69% in 2001).

### 3.2 Demographic Characteristics by Region - 2001

	Labrador (n=243)	Northern (n=211)	Central (n=200)
<b>AGE:</b>			
18-24	1.3	1.9	0.5
25-34	24.6	16.3	16.9
35-44	27.5	29.7	27.2
45-54	25.0	25.8	22.6
55-64	14.0	16.3	16.9
65+	7.6	10.0	15.9
<b>EDUCATION:</b>			
Elementary School	12.2	20.0	20.9
Some High School	20.3	29.3	29.1
Graduated High School	26.3	26.0	32.7
Voc/Tech College	19.1	11.1	5.1
Some University	3.0	3.8	4.1
Graduated University	19.1	9.6	8.2
<b>INCOME CATEGORY:</b>			
\$20,000 and under	22.1	37.9	50.8
\$20,001 to \$40,000	29.1	45.4	36.1
\$40,001 to \$60,000	17.6	11.1	10.7
\$60,001 to \$80,000	18.6	3.0	1.7
\$80,001 and over	12.6	2.5	0.5
<b>EMPLOYMENT CATEGORY:</b>			
Full-time	49.0	23.7	15.5
Part-time/Seasonal	25.9	45.5	34.0
Unemployed/Retraining	4.5	9.0	7.5
Homemaker	7.0	7.6	21.5
Retired	12.3	13.7	21.0
<b>GENDER:</b>			
Male	43.6	29.9	30.0
Female	56.4	70.1	70.0

Note: Refusals are excluded from the analysis.

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

- ◆ For the most part, the age category of customers in each region exhibits a relatively similar distribution. However, customers in the region of Labrador are significantly more likely to be between the ages of 25 and 34 (25%) than are customers in either Central (17%) or Northern (16%).
- ◆ Similar to past years, those customers residing in the region of Labrador are more likely to have graduated from a technical school (19%) or university (19%) and to have a household

income of greater than \$40,000 (49%). In line with these findings, Labradorians are also more likely to be working full-time (49%) than those in either the Northern (24%) or Central (16%).

- ◆ As compared to customers from other regions, those residing in the Central region are more likely to be 65 years or older (16%) and to label themselves as a homemaker (22%) or retired (21%).
- ◆ As previously noted, survey respondents for the 2001 Tracking Study were most often female. When examined by region, this is particularly evident in the Northern and Central regions where an equal percentage (70%) of customers are female. In Labrador, the percentage of female customers responsible for paying the electric bill is significantly lower at 56%. This finding is similar to that found in the 1999 and 2000 studies.

### 3.3 Demographic Characteristics by Service Area - 2001

	Interconnected (n=371)	Isolated (n=283)
<b>AGE:</b>		
18-24	1.4	1.1
25-34	18.8	20.4
35-44	28.3	28.0
45-54	25.8	22.9
55-64	16.3	14.7
65+	9.4	12.9
<b>EDUCATION:</b>		
Elementary School	13.9	22.1
Some High School	26.5	25.3
Graduated High School	26.4	30.2
Voc/Tech College	15.6	7.8
Some University	3.9	3.2
Graduated University	13.6	11.3
<b>INCOME CATEGORY:</b>		
\$20,000 and under	35.1	38.0
\$20,001 to \$40,000	32.9	42.0
\$40,001 to \$60,000	12.9	13.7
\$60,001 to \$80,000	11.3	3.9
\$80,001 and over	7.8	2.4
<b>EMPLOYMENT CATEGORY:</b>		
Full-time	35.6	24.0
Part-time/Seasonal	28.3	43.1
Unemployed/Retraining	7.8	5.7
Homemaker	12.7	10.2
Retired	14.6	16.6
<b>GENDER:</b>		
Male	33.2	37.5
Female	66.8	62.5

Note: Refusals are excluded from the analysis.

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation) between 2000 and 2001 data

- ◆ Hydro customers residing in interconnected areas are significantly more likely to have graduated from technical school (16%) and to make an income greater than \$60,000 per year (19%) through full-time employment (36%). In comparison, customers residing in isolated areas tend to be less well educated (high-school or less, 78%) and to be employed in part-time or seasonal work (43%).

### 3.4 Years of Service Relationship: Comparison of 2001, 2000 and 1999

	Labrador			Northern			Central			Total		
	99 (n=235)	00 (n=240)	01 (n=243)	99 (n=204)	00 (n=200)	01 (n=211)	99 (n=194)	00 (n=200)	01 (n=200)	99 (n=633)	00 (n=640)	01 (n=654)
<b>Average Number of Years Length of relationship:</b>	16.3	20.1	<b>18.6</b>	19.8	20.2	<b>22.8</b>	21.5	20.7	22.3	19.0	20.3	<b>21.1</b>
1 - 10 years	34.7	22.5*	<b>26.7†</b>	21.6	<b>22.0</b>	<b>14.2</b>	13.1	20.0*	16.5	22.2	<b>23.3</b>	<b>19.1</b>
11 - 19 years	21.1	20.0	<b>21.8</b>	19.2	22.0	<b>19.0</b>	22.2	17.5	18.0	20.9	18.4	<b>21.1</b>
20+ years	39.5	55.8*	<b>49.4†</b>	57.7	<b>55.0</b>	<b>64.0</b>	61.9	61.5	63.5	54.0	57.2	<b>57.5</b>
Don't Know	4.7	1.3	<b>2.0</b>	1.4	1.0	<b>2.8</b>	2.8	1.0	2.0	2.9	1.1	<b>2.3</b>

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation) between 2000 and 2001

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Compared to 2000, those who responded to the 2001 survey are significantly less likely to be customers of Hydro for 10 years or less (19%: 2001 versus 23% in 2000).
- ◆ In the Northern region, compared to 2000 data, there is a lower representation of customers with a service relationship greater than 1 to 10 years and a higher representation of customers with a service relationship of twenty years or more, when compared to 2000 data.

### 3.5 Access to the Internet: Comparison of 2001, 2000 and 1999

	Labrador			Northern			Central			Total		
	99 (n=245)	00 (n=240)	01 (n=243)	99 (n=206)	00 (n=200)	01 (n=211)	99 (n=198)	00 (n=200)	01 (n=200)	99 (n=649)	00 (n=640)	01 (n=654)
% with Access to the Internet												
<b>Access at All</b>	<b>40.0</b>	62.9*	<b>63.4†</b>	18.4	43.0*	<b>33.6</b>	27.3	41.0*	<b>41.0†</b>	29.3	42.5*	<b>42.6†</b>
<b>At Home</b>	27.3	37.7*	<b>46.5</b>	11.7	22.9*	<b>20.9†</b>	12.6	17.0	<b>27.5</b>	17.9	22.5*	<b>30.5</b>
<b>At Work</b>	30.6	38.9*	<b>34.6</b>	11.7	18.9*	<b>13.7</b>	8.6	12.0	<b>13.5</b>	17.9	<b>22.7*</b>	<b>17.2</b>
<b>At School</b>	5.3	19.7*	<b>23.0†</b>	12.6	19.9*	<b>15.2</b>	16.7	28.0*	<b>25.5†</b>	11.1	16.0*	<b>18.4†</b>

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation) between 2000 and 2001 data

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Overall, the incidence of Internet access among Hydro customers for 2001 is similar to that found in 2000 suggesting that access to the Internet may be leveling off (43%).
- ◆ When analyzed by access point, Internet access at home has increased significantly since 2000 (2001: 31% versus 2000: 23%), while access at work has declined (2001: 23% versus 2000: 17%). Access at school has remained consistent with 2000 findings (2001:18%. 2000:16%).
- ◆ When analyzed by region, there are significant differences in use between those surveyed in 1999, 2000 and 2001. In Labrador, overall access has significantly increased between 1999 and 2001 with approximately 63% of respondents now indicating they have access to the Internet. There was also a significant increase for Labradorians in Internet access from home (46% in 2001 from 38% in 2000). A similar increase in Internet access from home was also seen in Hydro customers from the Central region (28% in 2001 from 17% in 2000).

## 4.0 BILLING

To determine if customers are interested in paying their monthly electricity bill through alternative payment plans, customers participating in the 2001 tracking study were asked to indicate their likelihood of using each of the following services for making bill payments: a) equal payment plan; b) pre-authorized billing; and c) the Internet.

Through an equal payment plan, customers pay for the electricity they use through twelve equal payments over a one-year period. At the end of a year, if the household uses more or less electricity than the amount paid, the equal payment is adjusted being either increased or decreased for each month in the next year. A pre-authorized bill payment option means the amount of the customers' bill is automatically deducted from his/her bank account each month.

In addition to inquiring about bill payment options, customers with access to the Internet were asked how likely they would be to access various account information through on-line banking services.

### 4.1 Anticipated Use of Equal Payment Plan

	Labrador (n=243)	Northern (n=211)	Central (n=200)	Total (n=654)
<b>Definitely Use</b>	16.9	15.2	16.5	<b>17.4</b>
<b>Likely Use</b>	32.1	36.0	33.0	<b>31.3</b>
<b>Not Likely Use</b>	39.5	37.0	37.5	<b>39.9</b>
<b>Don't Know</b>	11.5	11.8	13.0	<b>11.4</b>

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

### 4.2 Anticipated Use of Pre Authorized Payment Plan

	Labrador (n=243)	Northern (n=211)	Central (n=200)	Total (n=654)
<b>Definitely Use</b>	17.3	9.5	7.5	<b>11.7</b>
<b>Likely Use</b>	20.2	24.2	25.5	<b>24.1</b>
<b>Not Likely Use</b>	56.8	61.1	61.0	<b>59.2</b>
<b>Don't Know</b>	5.8	5.2	6.0	<b>4.9</b>

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

- ◆ Less than half of those who responded to the survey indicate they would either definitely use (17%) or likely use (31%) the equal payment plan if it were available. This view is consistent across each of the three regions.

- ◆ Most of those who responded indicate they would not likely use a pre-authorized payment plan (59%). However, respondents from Labrador were significantly more likely than those from the Northern and Central regions to indicate they would definitely use the pre-authorized plan.

### 4.3 Anticipated Use of Internet Services

	Labrador (n=154)	Northern (n=71)	Central (n=82)	% with Internet Access (n=307)
<b>Bill Payment over the Internet</b>				
Definitely Use	22.1	8.5	7.3	15.2
Likely Use	20.1	33.8	18.3	19.9
Not Likely Use	52.6	56.3	65.9	58.7
Don't Know	5.2	1.4	8.5	6.2
<b>View Account Balance</b>				
Definitely Use	16.2	11.3	4.9	13.4
Likely Use	35.7	45.1	26.8	32.0
Not Likely Use	44.8	43.7	61.0	50.5
Don't Know	3.2	--	7.3	4.0
<b>View Account History</b>				
Definitely Use	16.9	14.1	2.4	12.8
Likely Use	39.0	40.8	26.8	34.8
Not Likely Use	40.3	43.7	63.4	47.9
Don't Know	3.9	1.4	7.3	4.5
<b>View Bill Payment Options</b>				
Definitely Use	16.9	8.5	4.9	11.8
Likely Use	31.2	47.9	26.8	30.7
Not Likely Use	48.7	42.3	59.8	52.6
Don't Know	3.2	1.4	8.5	5.0

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

- ◆ For those customers who have access to the Internet, slightly less than half indicate they would definitely use or likely use the Internet to make bill payments (35%), view account balances (45%), view account history (48%) or view bill payment options (43%).
- ◆ At the regional level, those in the Central region are less likely to indicate they would use the Internet to view account history, account balance and bill payment options or to make a bill payment over the Internet.

## 5.0 IMPORTANCE & PERFORMANCE RATINGS

In addition to the thirteen attributes measured in 1999, three new attributes deemed important to service delivery were measured in the 2000 Tracking Study (sixteen attributes in total). In the 2001 Tracking Study, 16 attributes were again measured, however, two attributes, “up-to-date information on billing procedures and changes” and up-to-date information on customer service and changes” were replaced with “bills are easy to read and understand” and “billing accuracy”. The list of service attributes is based upon criterion used by utilities; the Canadian Electric Association; 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 defining these five key dimensions are as follows:

### *Tangibles*

“Electricity at a reasonable cost”

“Bills easy to read and understand” (2001 Tracking Study Only)

### *Reliability*

“Able to complete equipment repairs and service right the first time”

“A reliable, uninterrupted supply of electricity”

“Billing statement accuracy” (2001 Tracking Study Only)

### *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 in providing each attribute (Performance Rating). This report section details customer response toward each individual service attribute.

### 5.1 Importance Factors: Comparison of 2001, 2000 and 1999

	Rank	Very Important	Somewhat Imp.	Neutral	Somewhat Unimp.	Very Unim.	N/A	Mean
<i>Concern for public safety</i>								
2000	2	94.9	4.3	0.5	--	--	0.3	9.8
2001	1	97.8	1.5	0.2	--	--	0.5	9.9
<i>Billing statement accuracy*</i>								
2001	2	94.8	5.0	0.2	--	--	--	9.8
<i>Electricity at a reasonable cost</i>								
1999	4	89.8	7.0	2.5	0.3	0.4	--	9.6
2000	3	91.2	6.9	1.6	--	0.3	--	9.7
2001	3	95.9	2.9	1.0	0.1	--	--	9.8
<i>A reliable, uninterrupted supply of electricity</i>								
1999	3	91.5	5.0	2.8	0.3	0.3	0.1	9.6
2000	1	96.2*	3.1*	0.5*	--	0.1	--	9.8
2001	4	94.8†	4.2	--	0.4	0.3	0.4	9.8
<i>A company which has the customer's best interest at heart</i>								
1999	5	90.1	7.0	2.0	--	0.4	0.6	9.6
2000	6	86.4*	8.0	4.6	0.1	0.2	0.6	9.5
2001	5	93.6	5.2	0.2	--	--	1.1	9.8
<i>Electricity quickly restored when there is a power outage</i>								
1999	1	90.1	7.6	1.7	--	0.1	0.4	9.7
2000	4	89.3	8.2	1.8	0.1	0.1	0.4	9.7
2001	6	93.9	4.8	0.9	--	--	0.4	9.8
<i>Able to complete equipment repairs and service right the first</i>								
1999	2	88.2	9.6	1.6	0.2	0.1	0.3	9.6
2000	5	89.3	8.5	0.6*	--	0.2	1.5*	9.6
2001	7	93.0	4.8	1.0	--	0.6	0.7	9.8
<i>Operates in an environmentally friendly manner</i>								
2000	7	83.6	11.7	2.6	0.3	0.3	1.5	9.5
2001	8	88.6	8.5	0.6	0.3	--	2.2	9.7
<i>Friendly &amp; courteous employees</i>								
1999	7	86.9	9.6	2.1	0.3	0.6	0.6	9.5
2000	9	84.3	11.7*	2.2	0.7	0.7	0.5	9.4
2001	9	88.4	7.7	2.0	--	0.2	1.5	9.7

	Rank	Very Important	Somewhat Imp.	Neutral	Somewhat Unimp.	Very Unim	N/A	Mean
<i>Convenient methods of payment</i>								
1999	6	83.5	12.7	2.3	0.6	0.3	0.6	9.5
2000	8	82.3	14.9	1.7	0.3	0.1	0.7	9.4
2001	10	91.0	6.0	1.3	0.1	0.6	1.0	9.7
<i>Quick response to customer questions and inquiries</i>								
1999	8	81.1	13.4	2.5	0.7	0.3	2.0	9.3
2000	10	75.1*	19.2*	4.0	0.4	0.5	0.9	9.2
2001	11	87.6	10.3	0.8	--	0.5	0.9	9.6
<i>Bills easy to read and understand*</i>								
2001	12	88.5	8.7	2.2	0.2	0.2	--	9.6
<i>Convenient hours of operation</i>								
1999	9	77.1	15.2	4.9	0.4	0.8	1.6	9.2
2000	12	72.0*	19.1*	6.1	0.7	1.4	0.7	9.0
2001	13	81.2	12.3	3.3	0.4	1.2	1.7	9.4
<i>Easy access to account information at any time</i>								
1999	10	77.5	15.9	4.5	1.4	0.5	0.4	9.2
2000	13	69.6*	20.0*	6.0	0.9	1.9*	1.7*	8.9
2001	14	84.2	9.3	2.7	0.2	1.8†	1.6†	9.4
<i>Contributes back to the community</i>								
2000	11	63.2	20.3	6.2	1.3	0.8	8.1	9.0
2001	15	76.3	15.4	1.3	0.3	0.6	6.0	9.4
<i>Education or information about electricity use</i>								
1999	13	60.1	26.2	10.0	1.5	1.5	0.6	8.5
2000	16	51.3*	27.3	15.6*	2.7	1.8	1.3	8.3
2001	16	66.4	20.1	9.8	1.1	0.3	2.1†	8.9

\* - New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Average importance ratings for Hydro customers on each of the sixteen service attributes range between 8.9 and 9.9 on a ten-point scale (1999 ratings ranged from 8.5 to 9.7 and 2000 ratings ranged from 8.3 to 9.8).
- ◆ Consistently high ratings indicate, for the most part, that Hydro customers regard each of the sixteen attributes as important. In fact, most customers (86% to 100%) rate all service attributes at least somewhat important.

- ◆ “Concern for public safety” ranks highest in importance for 2001 displacing “a reliable uninterrupted supply of electricity” which was ranked first last year and now ranks fourth. Ranked second most important for 2001 is “billing statement accuracy” followed by “electricity at a reasonable cost”.
- ◆ Least important attributes include “education or information about electricity use”(ranked last in 1999 and 2000), “contributes back to the community” and “easy access to account information at any time”.
- ◆ Average ratings for the two new service attributes are 9.6 for “bills easy to read and understand” and 9.8 for “billing statement accuracy”.
- ◆ In comparison to 2000 findings, the majority of the sixteen service attributes experience a slight drop in importance. This most likely reflects the high importance rating of the new supplementary service attribute, “billing statement accuracy” which displaced the remaining attributes to a lower placement on the customer’s list of importance.
- ◆ With the exception of the two new service attributes, and the attribute “a reliable uninterrupted supply of electricity” respondents are significantly more likely to indicate that an attribute is very important than in the 2000 tracking study suggesting that customers’ perceived importance for each item has risen.
- ◆ “Electricity at a reasonable cost” continues to rate high on the customer’s list of important service attributes. This year, 99% of customers consider this to be at least somewhat important, with a relative third ranking out of the sixteen attributes (1999: 97% rated as at least somewhat important and ranked fourth and in 2000: 98% rated at least somewhat important and ranked third).

## 5.2 Performance Evaluation: Comparison of 2001, 2000 and 1999

	Rank	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>Concern for public safety</i>								
2000	1	69.0	19.3	2.4	0.4	1.0	7.9	9.1
2001	1	76.3	15.0	1.8	0.1	0.3	6.5	9.3
<i>Bills easy to read and understand*</i>								
2001	2	79.3	16.1	3.1	0.6	0.2	0.7	9.2
<i>Convenient methods of payment</i>								
1999	2	71.5	18.2	4.8	2.4	1.5	1.6	8.8
2000	4	70.9	18.6	5.4	0.8*	1.8	2.5	8.8
2001	3	78.0	13.9	3.2	0.6†	1.1	3.3†	9.2
<i>Friendly &amp; courteous employees</i>								
1999	1	69.5	17.4	2.1	1.0	1.5	8.5*†	9.0
2000	2	70.4	17.6	5.4*	0.5	0.8	5.3*	9.0
2001	4	75.2	15.0	2.8	0.8	0.3†	6.0†	9.2
<i>Billing statement accuracy*</i>								
2001	5	80.1	14.1	1.5	1.4	0.7	2.4	9.1
<i>Convenient hours of operation</i>								
1999	3	61.8	18.5	7.3	2.5	1.4	8.4	8.6
2000	7	54.6	26.7*	7.1	0.8*	1.5	9.4	8.6
2001	6	66.9	17.3	4.4	0.5†	0.9	10.0	9.0
<i>Operates in an environmentally friendly manner</i>								
2000	3	57.7	19.2	5.0	1.0	0.6	16.5	8.9
2001	7	59.9	16.7	2.3	0.6	0.3	20.1	9.0
<i>Easy access to account information at any time</i>								
1999	5	54.1	22.4†	5.6	2.4	1.5	14.1*	8.5
2000	6	53.1	18.6	7.0	1.3	1.1	18.8*	8.6
2001	8	62.6	16.6†	5.6	0.1	1.3	13.8	9.0
<i>Able to complete equipment repairs and service right the first time</i>								
1999	4	57.6	26.6	6.8	0.6*	1.1	7.3	8.6
2000	5	56.0	23.8	6.3	1.7*	1.4	10.8*	8.7
2001	9	63.2	21.2†	5.5	0.8	0.3	9.0	8.8
<i>Quick response to customer questions and inquiries</i>								
1999	8	46.2	22.1	7.8	3.2	1.4	19.2	8.3
2000	10	46.7	23.7	11.0*	3.0	1.5	14.1*	8.2
2001	10	56.8	19.6	6.7	1.1	0.9	15.0†	8.6

	Rank	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>								
1999	6	53.7	31.0	10.8	2.4	1.8	0.3	8.3
2000	8	60.2*	27.0	10.0	1.7	1.2	--	8.5
2001	11	58.4†	33.2	6.2	1.7	0.4†	--	8.5
<i>Electricity quickly restored when there is a power</i>								
1999	7	52.7	34.6	8.6	2.0	1.9	0.2	8.3
2000	9	51.0	33.6	10.0	2.5	2.3	0.7	8.4
2001	12	54.9	30.3†	11.6†	1.1	1.2	0.8	8.3
<i>A company which has the customer's best interest at</i>								
1999	11	47.8	28.2	11.8	3.7	3.0	5.4	8.0
2000	13	41.5*	26.7	17.5*	3.3	3.3	7.6	7.9
2001	13	52.9	24.7	9.8	2.4	1.5	8.7†	8.2
<i>Education or information about electricity use</i>								
1999	12	39.8	28.1	11.9	7.6	4.3	8.3	7.6
2000	14	36.8	26.9	17.9*	4.8*	3.7	9.8	7.6
2001	14	43.6	26.2	10.0	3.3	4.3	12.6	7.9
<i>Electricity at a reasonable cost</i>								
1999	13	25.2	30.8	25.9	6.7	9.6	1.7	6.7
2000	15	30.9*	30.4	23.9	5.8	8.4	0.6	6.8
2001	15	33.0†	31.4	23.3	5.6	4.9	2.0	6.9
<i>Contributes back to the community</i>								
2000	16	16.1	11.5	7.5	6.2	11.8	46.8	6.2
2001	16	21.4	14.9	6.4	2.7	8.2	46.2	6.8

\* - New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Results of the 2001 Tracking study demonstrate that Hydro customers continue to evaluate the company favorably on each of the sixteen service attribute measured. Overall, the average performance ratings in the 2001 Tracking Study range from 6.8 to 9.3 on a ten-point scale (1999 ratings ranged from 6.7 to 9.0 and 2000 rating ranged from 6.2 to 9.1).
- ◆ In comparison to 2000, the majority of service attributes saw a slight decrease in their performance rank. This may be a result of the addition of a newly measured attribute, “bills easy to read and understand”, which ranks second in overall performance (95% of Hydro customers rate performance on this attribute as either excellent or good).
- ◆ With an exception of the two new attributes and the attributes “a reliable, uninterrupted supply of electricity”, “electricity at a reasonable cost”, “convenient hours of operation”, “operates in an environmentally friendly manner”, and “electricity quickly restored when there us a power outage”, Hydro customers in 2001 are significantly more likely to rate Hydro’s performance as “excellent” than in 2000.
- ◆ Hydro is also evaluated favorably on the new attribute “billing statement accuracy”, scoring an average 9.1 out of ten and ranking fifth overall.
- ◆ Similar to 2000, the attribute receiving the highest rank or performance is “concern for public safety”. Overall, 76% gave Hydro an “excellent” rating while 15% rated Hydro as “good”. It is noteworthy that Hydro customers are significantly more likely to rate Hydro as “excellent” on this characteristic than they were in 2000 (69% in 2000 versus 76% in 2001) suggesting that Hydro has improved its performance in this area.
- ◆ Hydro’s performance ranking on the attribute “friendly and courteous employees” has declined from second in 2000 to fourth in 2001. However, overall, Hyrdo’s performance on this attribute indicates that most customers are at least somewhat positive about its performance with 90% indicating performance is either “good” or “excellent”.
- ◆ Similar to 2000, customers rate Hydro *least* positively on the service attribute “contributes back to the community”, with 11% of respondents rating Hydro either “poor” or “very poor”. This attribute receives the lowest average rating of 6.8 out of ten, doing slightly better than in 2000 when it rated 6.2.
- ◆ One again, the attribute “electricity at a reasonable cost” ranks second to last. However, since 1999, this attribute has shown a small increase in positive ratings with 25% rating it “excellent” in 1999, compared to 33% in 2001.

## 6.0 CUSTOMER SATISFACTION INDEX (CSI)

The importance and satisfaction scores measured in this study can be combined to generate an overall measure called the Customer Satisfaction Index (CSI).

The CSI is a weighted average of satisfaction ratings for each of the service attributes used to elicit respondent feedback in the survey instrument. Each importance score on these attributes is divided by the sum of all importance scores and then multiplied by the perceived performance score assigned to Hydro on that one attribute (in effect, weighting the performance score by the relative importance). The resulting values are then summed, yielding a single Customer Service Index value for each respondent. The average of these values is the CSI in any one year.

The CSI ranges between one and ten (a ten-point scale is the measurement used by customers to rate importance and performance) and is used to track movement in overall satisfaction as defined by the service attributes specified within the study. The higher the index the better the customer service. In 1999, the CSI was based upon a set of thirteen defined service attributes and in 2000 and 2001, the CSI is based upon sixteen defined service attributes that are considered important to the provision of service by Hydro. The CSI for 2000 and 2001 are not directly comparable, due to the addition of two new attributes, namely “bills easy to read and understand” and “billing statement accuracy”. The service attributes “Up to date billing procedures and changes” and “Up to date information on customer services and changes” have been removed for the 2001 study.

	<u>Labrador</u>	<u>Northern</u>	<u>Central</u>	<u>Total</u>
<i>2000 Customer Service Index</i>	7.5	7.5	7.7	7.6
<i>2001 Customer Service Index</i>	7.4	8.1	8.3	7.9

- ◆ *In November 2001, the CSI for Newfoundland and Labrador Hydro is 7.9 out of 10. This is comparable with the CSI of 7.9 as calculated in the 2001 survey of Canadian Attitudes and Opinions of Electric Utilities, completed on behalf of the Canadian Electricity Association*
- ◆ *The CSI in both Central and the Northern regions is similar at 8.3 and 8.1 respectively. The CSI for Labrador is slightly lower at 7.4 out of 10. This is consistent with findings later in this report that indicate a slightly lower level of customer satisfaction and perceived performance in the Labrador region.*

	1999	2000	2001
<i>Customer Service Index</i>	7.8	7.6	7.9

*Note: the 1999 CSI is based on thirteen attributes and the 2000 and 2001 CSI is based on sixteen attributes, although not identical in content.*

As mentioned, the number and content of attributes used to calculate the CSI in the two tracking studies and the 1999 baseline study differ and therefore are not comparable on the same measure.



## 7.0 SERVICE GAP ANALYSIS

### 7.1 “Gap” on Specific Service Attributes: Comparisons between 2001, 2000 and 1999

A gap score is essentially the difference between customers’ evaluation of importance and perceived performance of any one attribute. If perceived performance exceeds expectations, then the customer is satisfied, if it falls below expectations, the customer is dissatisfied. A gap score of 2.0 or greater should be considered significant and as shown in the following table, customer evaluation of Hydro results in an average negative gap score from -2.9 to -0.4 percentage points.

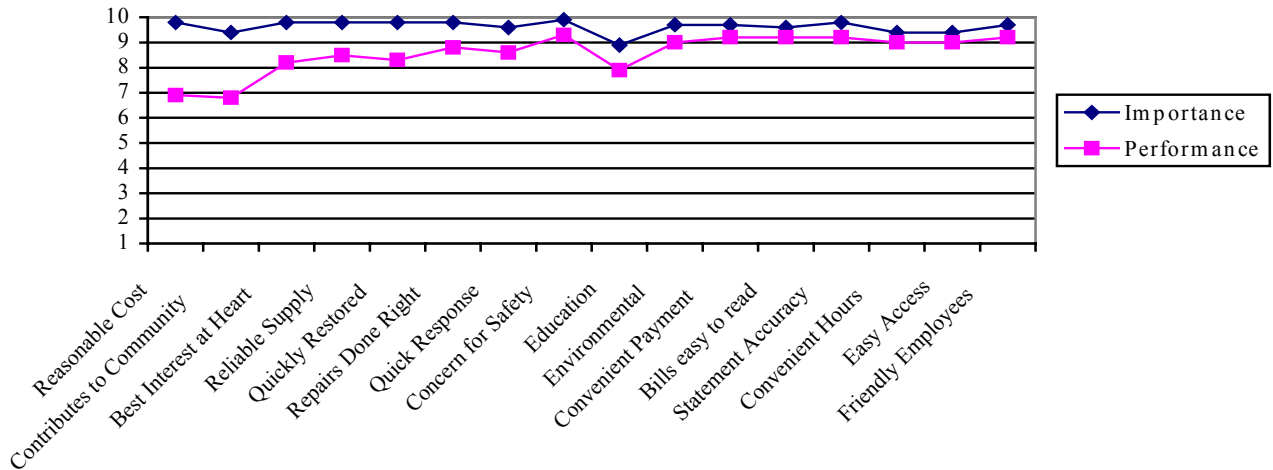
	IMPORTANCE		PERFORMANCE		Mean Gap Rating	% change
	Mean Rating	Rank	Mean Rating	Rank		
<i>Electricity at a reasonable cost</i>						
1999	9.6	4	6.7	13	-2.9	--
2000	9.7	3	6.8	15	-2.9	--
2001	<b>9.8</b>	<b>3</b>	<b>6.9</b>	<b>15</b>	<b>-2.9</b>	--
<i>Contributes back to community</i>						
2000	9.0	11	6.2	16	-2.7	--
2001	<b>9.4</b>	<b>15</b>	<b>6.8</b>	<b>16</b>	<b>-2.5</b>	<b>+0.2</b>
<i>A company which has the customer's best interest at heart</i>						
1999	9.6	5	8.0	11	-1.6	--
2000	9.5	6	7.9	13	-1.6	--
2001	<b>9.8</b>	<b>5</b>	<b>8.2</b>	<b>13</b>	<b>-1.6</b>	--
<i>Electricity quickly restored when there is a power outage</i>						
1999	9.7	1	8.3	7	-1.3	--
2000	9.7	4	8.4	9	-1.3	--
2001	<b>9.8</b>	<b>6</b>	<b>8.3</b>	<b>12</b>	<b>-1.5</b>	<b>-0.2</b>
<i>A reliable, uninterrupted supply of electricity</i>						
1999	9.6	3	8.3	6	-1.4	--
2000	9.8	1	8.5	8	-1.3	+0.1
2001	<b>9.8</b>	<b>4</b>	<b>8.5</b>	<b>11</b>	<b>-1.4</b>	<b>-0.1</b>

	IMPORTANCE		PERFORMANCE		Mean Gap Rating	% change
	Mean Rating	Rank	Mean Rating	Rank		
<i>Able to complete equip. repairs/ service right the first time</i>						
1999	9.6	2	8.6	4	-0.9	--
2000	9.6	5	8.7	5	-1.0	-0.1
2001	<b>9.8</b>	<b>7</b>	<b>8.8</b>	<b>9</b>	<b>-1.0</b>	--
<i>Quick response to customer questions and inquiries</i>						
1999	9.3	8	8.3	8	-1.0	--
2000	9.2	10.	8.2	10	-0.9	+0.1
2001	<b>9.6</b>	<b>11</b>	<b>8.6</b>	<b>10</b>	<b>-1.0</b>	<b>-0.1</b>
<i>Education or information about electricity use</i>						
1999	8.5	13	7.6	12	-1.0	--
2000	8.3	16	7.6	14	-0.7	+0.3
2001	<b>8.9</b>	<b>16</b>	<b>7.9</b>	<b>14</b>	<b>-1.0</b>	<b>-0.3</b>
<i>Billing statement accuracy*</i>						
2001	<b>9.8</b>	<b>2</b>	<b>9.2</b>	<b>5</b>	<b>-0.7</b>	--
<i>Concern for public safety</i>						
2000	9.8	2	9.1	1	-0.7	--
2001	<b>9.9</b>	<b>1</b>	<b>9.3</b>	<b>1</b>	<b>-0.7</b>	--
<i>Operates in an environmentally friendly manner</i>						
2000	9.5	7	8.9	3	-0.6	--
2001	<b>9.7</b>	<b>8</b>	<b>9.0</b>	<b>7</b>	<b>-0.7</b>	<b>-0.1</b>
<i>Convenient methods of payment</i>						
1999	9.5	6	8.8	2	-0.7	--
2000	9.4	8	8.8	4	-0.6	+0.1
2001	9.7	10	9.2	3	<b>-0.5</b>	+0.1

	IMPORTANCE		PERFORMANCE		Mean Gap Rating	% change
	Mean Rating	Rank	Mean Rating	Rank		
<i>Convenient hours of operation</i>						
1999	9.2	9	8.6	3	-0.6	--
2000	9.0	12	8.6	7	-0.4	+0.2
2001	<b>9.4</b>	<b>13</b>	<b>9.0</b>	<b>6</b>	<b>-0.5</b>	<b>-0.1</b>
<i>Easy access to account information at any time</i>						
1999	9.2	10	8.5	5	-0.6	--
2000	8.9	13	8.6	6	-0.4	+0.2
2001	<b>9.4</b>	<b>14</b>	<b>9.0</b>	<b>8</b>	<b>-0.5</b>	<b>-0.1</b>
<i>Friendly &amp; courteous employees</i>						
1999	9.5	7	9.0	1	-0.5	--
2000	9.4	9	9.0	2	-0.4	+0.1
2001	<b>9.7</b>	<b>9</b>	<b>9.2</b>	<b>4</b>	<b>-0.5</b>	<b>-0.1</b>
<i>Bills easy to read and understand*</i>						
2001	<b>9.6</b>	<b>12</b>	<b>9.2</b>	<b>2</b>	<b>-0.4</b>	<b>--</b>

\* - New attribute included in the 2001 Tracking Study only

### “Gap” in Importance Vs. Performance Total Customer Base 2001



- ◆ The performance of Hydro on each service attribute falls below customer expectations. That is, Hydro performs slightly below the expectations of their customer base. This trend is similar to that found in 1999 and 2000.
- ◆ Since 1999, consumers have been consistently dissatisfied with the attribute of “electricity at a reasonable cost” with this attribute having the largest gap score of all those measured (2.9 points below customer expectations for 1999, 2000 and 2001). Next to this, Hydro falls below expectations when evaluated on their contribution back to the community (2.5 points below expectations for 2001). However, compared to 2000, the gap between customer expectations and perceived performance has narrowed by 0.2 points.
- ◆ Performance on the two new service attributes “bills easy to read and understand” and “billing statement accuracy” are slightly below customer expectations (-0.4 and -0.7, respectively).
- ◆ Gap rating on the attribute “convenient methods of payment” has also improved slightly since the 2000 Tracking Study (+0.1) suggesting that consumers’ satisfaction with this attribute is increasing.
- ◆ The least negative gap exists on the new attribute, “bills easy to read and understand” (0.4). Next to this, Hydro falls slightly below expectations when evaluated on “convenient methods of payment”, “easy access to account information at any time”, and “friendly and courteous employees” (0.5, respectively).

- ◆ Similar to 2000, the greatest shift in gap occurs for the attribute “education or information about electricity use”. However, unlike last year, where the gap rating improved, in 2001, the gap has again widened to 1.0 percentage points below customer expectations. This shift most likely reflects the increased importance placed on this attribute by Hydro customers.

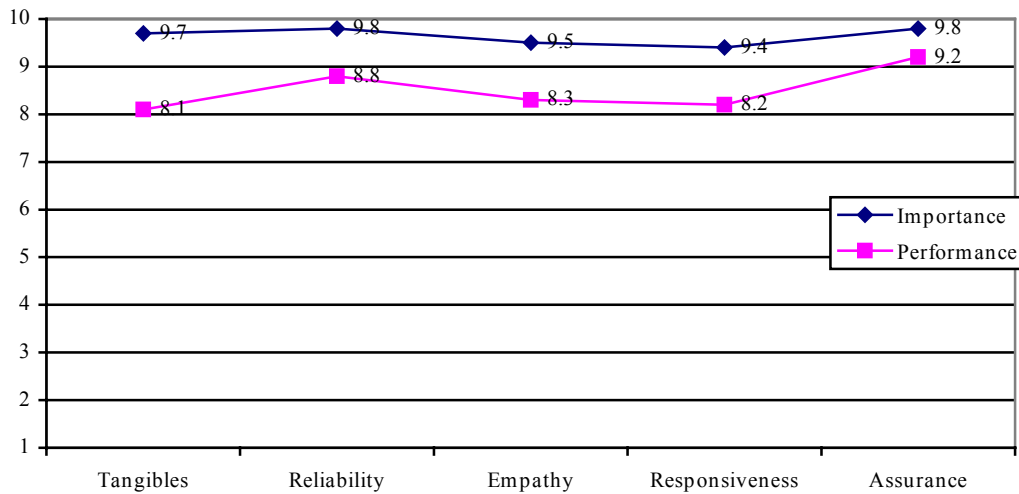
## 7.2 “Gap” on Key Service Dimensions

To assess the service quality of Hydro, each individual service attribute is compiled into the one of the five dimensions of the SERVQUAL model. The difference between expectations and performance on each dimension is calculated, enabling an evaluation of the overall service of the company.

	IMPORTANCE		PERFORMANCE		Mean Gap Rating	% change
	Mean Rating	Rank	Mean Rating	Rank		
<i>Tangibles*</i>						
1999	9.60	1	6.70	5	-2.90	--
2000	9.71	2	6.79	5	-2.92	-0.02
2001	<b>9.71</b>	<b>3</b>	<b>8.06</b>	<b>5</b>	<b>-1.66</b>	<b>+1.26</b>
<i>Empathy</i>						
1999	9.37	3	8.49	1	-0.86	--
2000	9.19	4	7.99	4	-1.15	-0.29
2001	<b>9.54</b>	<b>4</b>	<b>8.30</b>	<b>3</b>	<b>-1.22</b>	<b>-0.07</b>
<i>Responsiveness</i>						
1999	9.17	4	8.06	4	-1.11	--
2000	9.04	5	8.02	3	-1.04	+0.07
2001	<b>9.43</b>	<b>5</b>	<b>8.23</b>	<b>4</b>	<b>-1.18</b>	<b>-0.14</b>
<i>Reliability*</i>						
1999	9.60	2	8.47	2	-1.14	--
2000	9.73	1	8.59	2	-1.15	-0.01
2001	<b>9.80</b>	<b>1</b>	<b>8.81</b>	<b>2</b>	<b>-0.99</b>	<b>+0.16</b>
<i>Assurance</i>						
1999	9.07	5	8.43	3	-0.65	--
2000	9.22	3	8.70	1	-0.53	+0.12
2001	<b>9.78</b>	<b>2</b>	<b>9.16</b>	<b>1</b>	<b>-0.63</b>	<b>-0.10</b>

\* includes a new attribute added in 2001.

### “Gap” in Importance Vs. Performance - 2001



- ◆ Similar to past years, the largest service gap remains associated with the dimension of tangibles (1.66 percentage points below expectation). However, unlike the decrease in performance in 2000, the service gap for this dimension has improved by 1.26 percentage points. It must be noted that this improvement may be inflated due to the addition of the attribute “bills easy to read and understand”. Similarly, improved gap scores for the dimension of reliability may partially be due to the inclusion of the attribute “billing statement accuracy” (improved .16 points over 2000).
- ◆ For the dimension of empathy, the service gap increased between 1999 and 2001 (1999, -0.86; 2000, -1.15; and 2001, -1.22). This is the only dimension of the five, which consistently shows a widening of the service gap over the three years measured.
- ◆ The service gap has increased or become more negative with respect to responsiveness and assurance. In 2000, responsiveness falls 1.04 points below expectations, as compared to this year, falling short by a larger 1.18 percentage points. Similarly, assurance falls .53 points below expectations in 2000, as compared to this year, falling short by a larger .63 points.

## 8.0 SERVICE RELIABILITY

### 8.1 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

	Labrador			Northern			Central			Total		
	99 n=249	00 n=240	01 n=243	99 n=206	00 n=200	01 n=211	99 n=198	00 n=200	01 n=200	99 n=649	00 n=640	01 n=654
<b>Very Satisfied</b>	60.8	57.1	<b>63.4</b>	63.9	63.5	<b>71.1</b>	73.7	76.5	74.5	66.8	68.5	<b>75.1</b>
<b>Somewhat Satisfied</b>	29.6	28.3	<b>27.6</b>	28.8	26.5	<b>18.9</b>	20.7	17.0	19.5	25.9	22.5	<b>19.5†</b>
<b>Neutral</b>	6.3	10.8*	<b>7.4</b>	6.3	9.5	<b>5.7</b>	4.0	5.0	5.0	5.4	<b>7.2</b>	<b>3.7</b>
<b>Somewhat Dissatisfied</b>	2.1	1.7	<b>0.8</b>	--	--	<b>1.4</b>	0.8	0.5	0.5	0.9	0.7	<b>0.6</b>
<b>Very Dissatisfied</b>	1.1	2.1	<b>0.8</b>	1.0	--	<b>2.3</b>	0.8	0.5	0.5	0.9	0.9	<b>0.7</b>
<b>Mean Rating</b>	8.6	8.5	<b>8.8</b>	8.5	8.8	<b>8.9</b>	9.2	9.1	9.1	8.7	8.8	<b>8.9</b>
<b>Exceeded Expectations</b>	6.9	9.2	<b>6.2</b>	3.9	5.5	<b>10.4</b>	6.1	4.0	4.0	5.7	<b>7.3</b>	<b>3.9</b>
<b>Met Expectations</b>	86.1	<b>81.3</b>	<b>88.5</b>	87.4	87.0	<b>86.7</b>	89.9	91.0	89.0	87.7	<b>85.8</b>	<b>89.8</b>
<b>Have Not Met Expectations</b>	6.9	9.6	<b>4.9</b>	8.7	7.5	<b>2.8</b>	4.0	5.0	7.0	6.6	6.9	<b>6.1</b>

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ In 2001, the majority of Hydro customers are either very satisfied (75%) or somewhat satisfied (20%) with the supply of electricity they receive. Less than 2% of customers indicate they are somewhat dissatisfied or very dissatisfied with their electricity supply.
- ◆ It appears that customer satisfaction with service reliability has been increasing since the 1999 baseline study. Compared to 1999 and 2000, there is a significant increase in the number of customers who indicate they are "very satisfied" with their supply of electricity (2000, 69% of customers were very satisfied and in 1999, 67% of customers are very satisfied). Although satisfaction is high, the results of this study indicate there is still potential for improvement among 25% of Hydro customers.



- ◆ With the exception of the Northern region, satisfaction ratings have remained constant within each of the three regions. In comparison to 2000, customers in the Northern region are significantly more likely to note they are “very satisfied” (71% in 2001 from 64% in 2000) and less likely to indicate they are “somewhat satisfied” (19% in 2001 from 27% in 2000). Hydro customers in Central express the greatest satisfaction with their supply of electricity (75% of Central customers are very satisfied with the service, compared to 71% of Northern and 63% of Labrador customers). A similar finding was apparent in both 1999 and 2000.
- ◆ Overall, the service reliability of Hydro meets customer’s expectations (90%) with approximately 4% of respondents indicating service reliability exceeds expectations. Only 6% of customers said their expectations are not met. The percentage of customers rating service reliability as meeting expectations has increased significantly since 2000 (90% in 2001 from 86% in 2000). However, there is a significant decrease in respondents who report Hydro exceeds service delivery expectations.
- ◆ Compared to 2000, customers in the Northern region are significantly more likely to indicate that service reliability exceeds expectations and are less likely to indicate that Hydro has not met their expectations.

## 8.2 Gap on Service Reliability

	Mean Importance Rating			Mean Performance			Mean Gap Rating		
	1999	2000	2001	1999	2000	2001	1999	2000	2001
<i>A reliable, uninterrupted supply of electricity</i>	9.6	9.8	<b>9.8</b>	8.3	8.5	<b>8.5</b>	-1.4	-1.3	<b>-1.4</b>
<i>Electricity quickly restored when there is a power outage</i>	9.7	9.7	<b>9.8</b>	8.3	8.4	<b>8.3</b>	-1.3	-1.3	<b>-1.5</b>

- ◆ As indicated in the 2001 Tracking study, negative gap scores on the two attributes of service reliability “a reliable, uninterrupted supply of electricity” and “electricity quickly restored when there is a power outage” continue to exist (-1.3 and -1.5, respectively).
- ◆ The gap rating for the attribute “a reliable, uninterrupted supply of electricity” has remained relatively stable since the 1999 baseline study. However, the gap between expectations and performance has increased slightly for the attribute “electricity quickly restored when there is a power outage”.
- ◆ Similar to 1999 and 2000, negative gap scores in 2001 on these service attributes confirm the need for Hydro to improve its service reliability.

## 9.0 CUSTOMER SERVICE

### 9.1 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

	Labrador			Northern			Central			Total		
	99	00	01	99	00	01	99	00	01	99	00	01**
<b>Very Satisfied</b>	57.7	54.2	<b>62.0</b>	61.6	62.2	<b>70.8</b>	69.8	72.9	<b>80.0</b>	63.7	65.1	<b>76.3</b>
<b>Somewhat Satisfied</b>	34.6	32.4	<b>28.7</b>	30.0	29.1	<b>23.0</b>	22.9	21.1	<b>16.8</b>	28.5	26.3	<b>19.7</b>
<b>Neutral</b>	4.4	9.2*	<b>7.2</b>	6.8	8.2	<b>4.3</b>	4.5	4.5	<b>3.6</b>	5.2	6.2	<b>3.4</b>
<b>Somewhat Dissatisfied</b>	2.2	2.1	<b>0.8</b>	1.6	0.5	<b>1.4</b>	2.0	0.5	--	1.9	1.1	<b>0.4†</b>
<b>Very Dissatisfied</b>	1.1	2.1	<b>1.2</b>	--	--	<b>0.4</b>	0.8	1.0	--	0.6	1.3	<b>0.1</b>
<b>Mean Rating</b>	8.5	8.4	<b>8.7</b>	8.6	8.8	<b>9.0</b>	9.0	9.0	<b>9.2</b>	8.7	8.7	<b>9.0</b>
<b>Exceeded Expectations</b>	6.7	9.6	<b>5.3</b>	4.0	5.0	<b>7.1</b>	4.7	4.5	<b>2.0</b>	5.2	8.8*	<b>3.3</b>
<b>Met Expectations</b>	86.1	83.3	<b>90.1</b>	92.0	87.0*	<b>90.0</b>	90.7	90.5	<b>93.5</b>	89.3	84.6*	<b>91.5</b>
<b>Have Not Met Expectations</b>	7.1	7.1	<b>4.1</b>	4.0	8.0*	<b>2.8</b>	4.7	5.0	<b>4.5</b>	5.4	6.6	<b>5.1</b>

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

\*\* Note: Some customers were unable to answer this question and are excluded from the analysis (n=15).

- ◆ The majority of customers are "very satisfied" (76%) with the customer service they receive from Newfoundland and Labrador Hydro. Approximately 20% are "somewhat satisfied" and 1% are either somewhat dissatisfied or very dissatisfied. This trend is similar to that found in 1999 and 2000. However, compared to 2000, customers are significantly more likely to rate themselves as "very satisfied" with customer service (76% in 2001 from 65% in 2000) and are less likely to rate themselves as "somewhat satisfied" (20% in 2001 from 26% in 2000).
- ◆ Compared to results of the 2000 tracking study, the percentage of customers who indicate they are "very satisfied" increased significantly within each region. However, when compared to the Northern and Labrador regions, it is evident that customers in the Central region continue to express greater satisfaction with customer service than customers in other regions of the province (80% are very satisfied, compared to 71% of Northern and 62% of Labrador customers).

- ◆ The majority of customers indicate that customer service met their expectations (92%), with only 3% of customers noting that customer service exceeded their expectations. Similar to past years approximately 5% of customers reported that customer satisfaction fell short of their expectations.
- ◆ At the regional level, compared to results of the 2000 Tracking Study, customers in the Northern region are significantly less likely to indicate that service did not meet expectations. Also, Labradorians are significantly more likely to indicate that customer service met expectations ( 90% in 2001 from 83% in 2000) but significantly less likely to indicate that customer satisfaction exceeded expectations (5% in 2001 from 10% in 2000).

## 10.0 SERVICE GAP BY REGION: COMPARISONS OF 2001, 2000 AND 1999

	LABRADOR			NORTHERN			CENTRAL			TOTAL		
	99	00	01	99	00	01	99	00	01	99	00	01
<i>A reliable, uninterrupted supply of electricity</i>	-1.5	-1.6	<b>-1.6</b>	-1.7	-1.3	<b>-1.4</b>	-0.9	-0.9	<b>-1.1</b>	-1.4	-1.3	<b>-1.4</b>
<i>Electricity at a reasonable cost</i>	-2.2	-2.5	<b>-2.6</b>	-3.4	-3.5	<b>-3.5</b>	-3.4	-2.9	<b>-2.8</b>	-2.9	-2.9	<b>-2.9</b>
<i>Electricity quickly restored when there is a power outage</i>	-1.4	-1.5	<b>-1.8</b>	-1.5	-1.3	<b>-1.5</b>	-1.1	-1.2	<b>-1.1</b>	-1.3	-1.3	<b>-1.5</b>
<i>Bills easy to read and understand*</i>	--	--	<b>-0.4</b>	--	--	<b>-0.5</b>	-0.4	-0.2	<b>-0.2</b>	-0.6	-0.5	<b>-0.4</b>
<i>Billing statement accuracy*</i>	--	--	<b>-0.9</b>	-1.0	-0.7	<b>-0.7</b>	-0.4	-0.1	<b>-0.4</b>	-0.7	-0.5	<b>-0.7</b>
<i>Quick response to customer questions and inquiries</i>	-1.0	-1.1	<b>-1.4</b>	-1.2	-1.0	<b>-0.9</b>	-0.7	-0.6	<b>-0.5</b>	-1.0	-0.9	<b>-1.0</b>
<i>Convenient hours of operation</i>	-0.8	-0.8	<b>-0.8</b>	-0.6	-0.3	<b>-0.5</b>	-0.2	-0.2	<b>-0.3</b>	-0.6	-0.4	<b>-0.5</b>
<i>Easy access to account information at any time</i>	-0.9	-0.7	<b>-0.6</b>	-0.6	-0.1	<b>-0.4</b>	-0.3	-0.1	<b>-0.4</b>	-0.6	-0.4	<b>-0.5</b>
<i>Able to complete equipment repairs and service right the first time</i>	-1.0	-1.1	<b>-1.4</b>	-1.1	-1.0	<b>-0.9</b>	-0.7	-0.8	<b>-0.6</b>	-0.9	-1.0	<b>-1.0</b>
<i>Education or information about electricity use</i>	-0.8	-0.6	<b>-1.0</b>	-1.3	-1.0	<b>-1.1</b>	-1.0	-0.4	<b>-0.9</b>	-1.0	-0.7	<b>-1.0</b>
<i>Friendly &amp; courteous employees</i>	-0.8	-0.7	<b>-0.9</b>	-0.4	-0.3	<b>-0.4</b>	-0.3	-0.2	<b>-0.2</b>	-0.5	-0.4	<b>-0.5</b>
<i>A company which has the customer's best interest at heart</i>	-1.5	-1.8	<b>-2.2</b>	-1.6	-1.6	<b>-1.4</b>	-1.7	-1.5	<b>-1.3</b>	-1.6	-1.6	<b>-1.6</b>
<i>Convenient methods of payment</i>	-1.1	-1.0	<b>-0.7</b>	-0.5	-0.6	<b>-0.4</b>	-0.3	-0.1	<b>-0.4</b>	-0.7	-0.6	<b>-0.5</b>
<i>Operates in an environmentally friendly manner</i>	--	-0.9	<b>-1.2</b>	--	-0.5	<b>-0.6</b>	--	-0.3	<b>-0.4</b>	--	-0.6	<b>-0.7</b>
<i>Concern for public safety</i>	--	-0.8	<b>-1.0</b>	--	-0.7	<b>-0.6</b>	--	-0.5	<b>-0.4</b>	--	-0.7	<b>-0.7</b>

	LABRADOR			NORTHERN			CENTRAL			TOTAL		
	99	00	01	99	00	01	99	00	01	99	00	01
<i>Contributes back to the community</i>	--	-2.7	<b>-2.6</b>	--	-2.8	<b>-2.7</b>	--	-2.5	<b>-2.3</b>	--	-2.7	<b>-2.5</b>

\* - New attribute included in the 2001 Tracking Study only

## 11.0 SERVICE GAP BY SUB REGION: COMPARISONS OF 2001, 2000 AND 1999

	Lab City Wabush	H Valley /Goose	Lab Isol	North Inter	North Isol.	Central Inter	Central Isol.
<i>A reliable, uninterrupted supply of electricity</i>							
1999	-0.5	-1.9	-1.9	-1.3	-2.1	-1.4	-0.3
2000	-0.4	-2.2	-2.4	-1.2	-1.4	-1.4	-0.3
2001	<b>-1.1</b>	<b>-1.6</b>	<b>-2.1</b>	<b>-0.6</b>	<b>-2.3</b>	<b>-1.2</b>	<b>-1.0</b>
<i>Electricity at a reasonable cost</i>							
1999	-0.4	-2.2	-3.8	-3.4	-3.4	-3.6	-3.3
2000	-0.3	-2.3	-4.9	-3.4	-3.5	-2.9	-2.9
2001	<b>-0.8</b>	<b>-2.6</b>	<b>-4.2</b>	<b>-2.9</b>	<b>-4.2</b>	<b>-2.6</b>	<b>-2.9</b>
<i>Electricity quickly restored when there is a power outage</i>							
1999	-0.8	-1.8	-1.7	-1.2	-1.7	-1.5	-0.6
2000	-0.5	-1.9	-2.1	-1.0	-1.5	-1.8	-0.6
2001	<b>-0.9</b>	<b>-2.1</b>	<b>-2.4</b>	<b>-0.8</b>	<b>-2.2</b>	<b>-1.5</b>	<b>-0.7</b>
<i>Bills easy to read and understand*</i>							
2001	<b>+0.1</b>	<b>-0.7</b>	<b>-0.7</b>	<b>-0.3</b>	<b>-0.6</b>	<b>-0.3</b>	<b>-0.2</b>
<i>Billing Statement Accuracy*</i>							
2001	<b>-0.3</b>	<b>-1.0</b>	<b>-1.3</b>	<b>-0.4</b>	<b>-1.0</b>	<b>-0.4</b>	<b>-0.4</b>
<i>Quick response to customer questions and</i>							
1999	-0.8	-1.2	-1.0	-1.1	-1.3	-1.0	-0.4
2000	-0.6	-1.4	-1.4	-0.7	-1.2	-1.0	-0.1
2001	<b>-0.8</b>	<b>-2.0</b>	<b>-1.4</b>	<b>-0.7</b>	<b>-1.1</b>	<b>-0.6</b>	<b>-0.4</b>
<i>Convenient hours of operation</i>							
1999	-0.4	-1.6	-0.4	-0.4	-0.7	-0.3	-0.2
2000	-0.8	-0.7	-0.8	-0.2	-0.4	-0.3	-0.1
2001	<b>-0.3</b>	<b>-0.9</b>	<b>-1.2</b>	<b>-0.2</b>	<b>-0.8</b>	<b>-0.4</b>	<b>-0.2</b>
<i>Easy access to account information at any time</i>							
1999	-0.4	-1.2	-1.0	-0.4	-0.9	-0.5	-0.2
2000	-0.3	-1.0	-0.9	+0.1	-0.3	-0.2	-0.1
2001	<b>+0.1</b>	<b>-0.7</b>	<b>-1.3</b>	<b>-0.2</b>	<b>-0.6</b>	<b>-0.8</b>	<b>-0.1</b>

	Lab City Wabush	H Valley /Goose	Lab Isol	North Inter	North Isol.	Central Inter	Central Isol.
<i>Able to complete equipment repairs and service right the first time</i>							
1999	-0.6	-1.2	-1.2	-0.8	-1.4	-0.9	-0.5
2000	-0.4	-1.5	-1.4	-0.8	-1.2	-1.4	-0.2
2001	-0.9	-1.5	-1.8	-0.3	-1.5	-0.7	-0.6
<i>Education or information about electricity use</i>							
1999	-0.2	-1.2	-1.0	-1.0	-1.6	-1.2	-0.8
2000	0.3	-0.7	-1.4	-1.1	-1.0	-0.7	-0.2
2001	+0.2	-1.6	-1.7	-0.8	-1.2	-1.0	-0.7
<i>Friendly &amp; courteous employees</i>							
1999	-0.6	-0.9	-0.8	-0.1	-0.8	-0.3	-0.3
2000	-0.2	-0.9	-0.8	-0.04	-0.7	-0.3	-0.03
2001	-0.3	-1.1	-1.2	-0.1	-0.8	-0.4	-0.1
<i>A company which has the customer's best interest at heart</i>							
1999	-0.9	-2.3	-1.3	-1.2	-1.9	-1.7	-1.6
2000	-1.0	-1.7	-2.5	-1.7	-1.6	-1.8	-1.1
2001	-1.8	-2.2	-2.5	-0.9	-1.8	-1.1	-1.4
<i>Convenient methods of payment</i>							
1999	-0.7	-1.6	-1.1	-0.2	-0.9	-0.3	-0.2
2000	-0.5	-1.3	-1.1	-0.3	-0.8	-0.3	+0.1
2001	-0.4	-0.9	-0.8	-0.2	-0.6	-0.5	-0.3
<i>Operates in an environmentally friendly</i>							
2000	-0.4	-0.9	-1.2	-0.6	-0.5	-0.4	-0.3
2001	-0.7	-1.4	-1.5	-0.1	-1.1	-0.5	-0.3
<i>Concern for public safety</i>							
2000	-0.5	-0.9	-1.2	-0.7	-0.7	-0.6	-0.4
2001	-0.8	-1.0	-1.2	-0.2	-0.9	-0.4	-0.4
<i>Contributes back to the community</i>							
2000	-1.6	-1.0	-4.9	-2.8	-2.9	-3.5	-1.8
2001	-2.0	-2.0	-3.5	-2.0	-3.0	-2.4	-2.3

\* - New attribute included in the 2001 Tracking Study only

- ◆ When compared within region, findings again mirror the 1999 and 2000 data with only small year-to-year changes in 'gap' performance findings.

- ◆ Although the overall gap on “electricity at a reasonable cost” is identical to 1999 and 2000 (-2.9), as outlined in the previous section, the ‘gap’ has improved slightly in the Central region. When examined within the region, the gap improvement for Central residents occurred in the Interconnected (-2.6 from -2.9) area, but not in the Isolated. Although the ‘gap’ on this attribute only changed slightly in the Labrador region (-2.6 from -2.5), when examined within this region, there was greater than half a percentage point negative change among Labrador Isolated communities (-4.9 from -4.3).
- ◆ In the Northern isolated region, most of the gap ratings have increased, or become more negative since 2001. Specifically, the gap ratings for “reliable, uninterrupted supply of electricity”, “electricity at a reasonable cost”, and “electricity restored when there is a power outage” have each increased by 0.7 percentage points. Hydro’s performance on the reasonable cost of electricity now falls 4.2 percentage points below customer expectations in this region.
- ◆ When year to year data is compared in the Labrador Isolated area, there appears to be a negative change or no change for most attributes, with the exception of “electricity at a reasonable cost”, “a reliable, uninterrupted supply of electricity”, “convenient methods of payments” and “contributes back to the community” where there is a slight positive change.



## 12.0 LABRADOR REGION

### 12.1 Importance Factors Labrador: Comparison of 2001, 2000 and 1999

	Very. Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>							
1999	87.9	8.4	3.2	--	0.5	--	9.5
2000	93.7*	5.4	0.4*	0.4	--	--	9.8
2001	<b>94.2†</b>	<b>5.8</b>	--	--	--	--	<b>9.8</b>
<i>Electricity at a reasonable cost</i>							
1999	89.4	6.3	3.7	0.5	--	--	9.5
2000	88.7	9.6	0.8*	--	0.8	--	9.6
2001	<b>95.5</b>	<b>3.3</b>	<b>0.8†</b>	<b>0.4</b>	--	--	<b>9.8</b>
<i>Electricity quickly restored when there is a power outage</i>							
1999	89.4	7.4	3.2	--	--	--	9.6
2000	89.5	8.4	1.3	0.4	0.4	--	9.7
2001	<b>95.5</b>	<b>3.7</b>	<b>0.8†</b>	--	--	--	<b>9.8</b>
<i>Bills easy to read and understand**</i>							
2001	<b>80.7</b>	<b>14.0</b>	<b>4.0</b>	<b>0.8</b>	<b>0.4</b>	--	<b>9.4</b>
<i>Billing Statement Accuracy**</i>							
2001	<b>93.4</b>	<b>6.2</b>	<b>0.4</b>	--	--	--	<b>9.8</b>
<i>Quick response to customer questions and inquiries</i>							
1999	71.1	19.5	5.8	0.5	--	3.2	9.1
2000	72.0	23.4	2.9	--	0.8	0.8*	9.2
2001	<b>83.1</b>	<b>13.6</b>	<b>2.5†</b>	--	<b>0.4</b>	<b>0.4†</b>	<b>9.5</b>
<i>Convenient hours of operation</i>							
1999	70.0	22.1	5.8	--	1.1	1.1	9.0
2000	67.8	20.1	7.1	1.3	2.5	1.3	8.8
2001	<b>75.3</b>	<b>14.8†</b>	<b>6.6</b>	--	<b>1.6</b>	<b>1.6</b>	<b>9.2</b>
<i>Easy access to account information at any time</i>							
1999	68.3	21.7	6.3	2.1	0.5	1.1	9.0
2000	65.3	21.8	8.4	1.7	1.3	1.7	8.8
2001	<b>76.1</b>	<b>12.8</b>	<b>7.8</b>	<b>0.4†</b>	<b>0.8</b>	<b>2.1</b>	<b>9.2</b>
<i>Able to complete equipment repairs and service right the first</i>							
1999	84.7	11.6	2.1	0.5	--	1.1	9.4
2000	86.2	10.9	0.8	--	0.4	1.7	9.6
2001	<b>93.0</b>	<b>5.3</b>	<b>0.8</b>	--	<b>0.4</b>	<b>0.4</b>	<b>9.8</b>

	Very. Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All	N/A	Mean
<i>Education or information about electricity use</i>							
1999	47.9	33.7	12.6	3.2	2.1	0.5	8.2
2000	47.3	32.2	14.2	3.3	2.1	0.8	8.1
2001	55.6	25.9†	15.2	1.6	0.8	0.8	8.5
<i>Friendly &amp; courteous employees</i>							
1999	82.1	12.1	4.7	--	--	1.1	9.5
2000	81.2	13.8	2.9	0.4	0.4	1.3	9.4
2001	87.7	9.5	2.1	--	--	0.8	9.7
<i>A company which has the customer's best interest at heart</i>							
1999	84.7	12.1	2.1	--	0.5	0.5	9.5
2000	85.4	10.5	2.9	--	0.4	0.8	9.5
2001	93.4	5.8	--	--	--	0.8	9.8
<i>Convenient methods of payment</i>							
1999	78.3	16.9	4.2	--	--	0.5	9.4
2000	80.3	16.3	2.5	0.4	0.4	--	9.4
2001	84.8†	9.1	2.9	0.4	0.4	2.5†	9.5
<i>Operates in an environmentally friendly manner</i>							
2000	87.9	9.6	2.1	--	--	0.4	9.6
2001	87.2	9.1	1.2	--	--	2.5	9.7
<i>Concern for public safety</i>							
2000	94.6	4.6	0.4	--	--	0.4	9.8
2001	97.9	1.2	0.4	--	--	0.4	9.9
<i>Contributes back to the community</i>							
2000	61.5	24.3	7.9	0.8	0.8	4.6	8.8
2001	72.8	18.1	4.9	1.6	0.4	2.1	9.2

\* \*- New attribute included in the 2000 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Consistent with 2000, Labrador customers continue to rate “concern for public safety” (98% “very important”, 9.9 mean rating) and “reliable, uninterrupted supply of electricity” as the most important attributes of customer service (94% “very important”, 9.8 mean rating).
- ◆ In 2001, each of the service attributes experience a slight increase in rated importance among Labrador customers. Specifically, the greatest increase in importance ratings exists with “convenient hours of operation”, “education or information about electricity use”, “easy access to account information at any time” and “contributes back to the community” with each of the four attributes experiencing an increase in mean importance (0.4, respectively).

- ◆ Although increasing since 2000, the lowest level of importance continues to exist with “education or information about electricity use”, with 82% of Labrador customers rating the attribute at least somewhat important (8.5 mean rating).

## 12.2 Performance Evaluation Labrador: Comparison of 2001, 2000 and 1999

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>							
1999	51.6	33.7	10.5	2.6	1.6	--	8.1
2000	53.6	26.4*	13.4	3.8	2.9	--	8.2
2001	46.5	39.9	9.9	2.1	1.6	--	8.2
<i>Electricity at a reasonable cost</i>							
1999	48.4	28.2*	13.8	3.7	4.3	1.6	7.4
2000	42.3	20.1*	19.2	9.6*	8.8*	--	7.2
2001	36.2†	28.8	19.3	7.8†	5.8	2.1	7.3
<i>Electricity quickly restored when there is a power</i>							
1999	50.0	38.4	6.8	1.6	2.6	0.5	8.2
2000	51.0	32.2	9.2	2.9	3.8	0.8	8.2
2001	44.4	36.6	14.4	1.6	2.5	0.4	8.0
<i>Bills easy to read and understand**</i>							
2001	68.7	21.0	7.0	1.2	0.8	1.2	8.9
<i>Billing Statement Accuracy**</i>							
2001	67.1	18.9	4.5	2.1	1.2	6.2	8.9
<i>Quick response to customer questions and inquiries</i>							
1999	44.5	26.7	9.4	4.2	2.1	13.1	8.1
2000	40.6	31.0	11.7	2.9	2.1	11.7	8.1
2001	39.5	25.1	9.5	3.7	2.5	19.8	8.1
<i>Convenient hours of operation</i>							
1999	53.2	23.4	11.7	3.2	4.3	4.3	8.2
2000	49.4	24.3	9.2	2.5	4.2	10.5*	8.2
2001	51.4	25.1	7.4	0.4	2.9	12.8†	8.5
<i>Easy access to account information at any time</i>							
1999	46.3	28.4	10.0	3.2	2.6	9.5	8.2
2000	49.4	23.4	9.6	3.3	2.5	11.7	8.2
2001	50.6	22.2	7.4	0.8	1.6	17.3	8.6

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>Able to complete equipment repairs and service right the first time</i>							
1999	50.8	31.7	6.3	1.1	1.1	9.0	8.4
2000	56.5	22.2*	8.8	1.7	2.1	8.8	8.5
2001	47.3	29.2	8.2	2.5	1.2	11.5	8.4
<i>Education or information about electricity use</i>							
1999	38.1	31.2	14.8	3.2	5.8	6.9	7.5
2000	35.6	31.8	19.2	5.4	3.8	4.2	7.5
2001	33.7	30.9	15.2	4.9	4.9	10.3	7.5
<i>Friendly &amp; courteous employees</i>							
1999	62.6	21.1	5.3	2.1	2.6	6.3	8.7
2000	61.1	24.7	6.3	1.3	1.7	5.0	8.8
2001	59.3	25.9	6.6	0.4†	1.2	6.6	8.8
<i>A company which has the customer's best interest at heart</i>							
1999	43.7	31.1	13.2	3.2	3.7	5.3	7.9
2000	42.7	28.9	15.9	5.0	3.3	4.2	7.8
2001	38.7	29.2	15.2	4.9	3.3	8.6	7.7
<i>Convenient methods of payment</i>							
1999	58.9	20.0	9.5	4.7	4.7	2.1	8.3
2000	61.1	20.9	10.5	2.1	4.2	1.3	8.4
2001	66.7†	18.9	6.6	2.1	1.2	4.5	8.9
<i>Operates in an environmentally friendly manner</i>							
2000	55.2	23.8	6.7	1.3	0.8	12.1	8.7
2001	43.6	23.0	5.8	2.9	0.8	23.9	8.5
<i>Concern for public safety</i>							
2000	64.0	25.9	3.8	0.4	0.4	5.4	9.0
2001	58.4	25.5	2.5	0.4	1.2	11.9	8.9
<i>Contributes back to the community</i>							
2000	17.2	15.9	13.4	7.1	10.5	36.0	6.3
2001	14.0	17.3	7.8	4.5	8.2	48.1	6.5

\* - New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Including last year's top performer "concern for public safety", Labrador customers report the highest performance ratings with the attributes "bills easy to read and understand", "billing statement accuracy" and "convenient methods of payment" (8.9 mean rating, respectively).

- ◆ Consistent with 2000, Labrador customers continue to rate Hydro poorly on their contributions to the community. Overall, slightly less than half of Labrador customers are unable to provide a rating on this attribute (48%), and 13% of those customers knowledgeable about Hydro’s community contributions, rate Hydro unfavorably on this issue.
- ◆ For the most part, the majority of attributes experience a slight increase or remained constant when compared with the measurements in previous tracking studies. When comparing mean scores, the largest increase in performance is evident with “convenient methods of payment”, with 86% satisfied with Hydro on this issue, compared to 82% in 2000 (8.9 and 8.4 mean ratings, respectively).
- ◆ The greatest decline in performance ratings exists with “operates in an environmentally friendly manner”. In 2000, 79% rated Hydro favorably on this service attribute, declining this year to 66% of Labrador customers.

### 12.3 Service Gap Analysis Labrador: Comparison of 2001, 2000 and 1999

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.

	IMPORTANCE Mean Rating	PERFORMANCE Mean Rating	GAP Mean Rating	% Change
<i>Electricity at a reasonable cost</i>				
1999	9.5	7.4	-2.2	--
2000	9.6	7.2	-2.5	-0.3
2001	<b>9.8</b>	<b>7.3</b>	<b>-2.6</b>	<b>-0.1</b>
<i>Contributes back to community</i>				
2000	8.8	6.3	-2.7	--
2001	<b>9.2</b>	<b>6.5</b>	<b>-2.6</b>	<b>+0.1</b>
<i>A company which has the customer's best interest at heart</i>				
1999	9.5	7.9	-1.5	--
2000	9.5	7.8	-1.8	-0.3
2001	<b>9.8</b>	<b>7.7</b>	<b>-2.2</b>	<b>-0.4</b>
<i>A reliable, uninterrupted supply of electricity</i>				
1999	9.5	8.1	-1.5	--
2000	9.8	8.2	-1.6	-0.1
2001	<b>9.8</b>	<b>8.2</b>	<b>-1.6</b>	--
<i>Electricity quickly restored when there is a power outage</i>				
1999	9.6	8.2	-1.4	-0.1
2000	9.7	8.3	-1.5	-0.1
2001	<b>9.8</b>	<b>8.0</b>	<b>-1.8</b>	<b>-0.3</b>
<i>Able to complete equip. repairs/ service right the first time</i>				
1999	9.4	8.4	-1.0	--
2000	9.6	8.5	-1.1	-0.1
2001	<b>9.8</b>	<b>8.4</b>	<b>-1.4</b>	<b>-0.3</b>

	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Quick response to customer questions and inquiries</i>				
1999	9.1	8.1	-1.0	--
2000	8.8	8.1	-1.1	-0.1
2001	<b>9.5</b>	<b>8.1</b>	<b>-1.4</b>	<b>-0.3</b>
<i>Concern for public safety</i>				
2000	9.8	9.0	-0.8	--
2001	<b>9.9</b>	<b>8.9</b>	<b>-1.0</b>	<b>-0.2</b>
<i>Education or information about electricity use</i>				
1999	8.2	7.5	-0.8	--
2000	8.1	7.5	-0.6	+0.2
2001	<b>8.5</b>	<b>7.5</b>	<b>-1.0</b>	<b>-0.4</b>
<i>Operates in an environmentally friendly manner</i>				
2000	9.6	8.7	-0.9	--
2001	<b>9.7</b>	<b>8.5</b>	<b>-1.2</b>	<b>-0.3</b>
<i>Convenient methods of payment</i>				
1999	9.4	8.3	-1.1	+0.1
2000	9.4	8.4	-1.0	+0.1
2001	<b>9.5</b>	<b>8.9</b>	<b>-0.7</b>	<b>+0.3</b>
<i>Bills easy to read and understand*</i>				
2001	<b>9.4</b>	<b>8.9</b>	<b>-0.4</b>	--
<i>Billing Statement Accuracy*</i>				
2001	<b>9.8</b>	<b>8.9</b>	<b>-0.9</b>	--
<i>Convenient hours of operation</i>				
1999	9.0	8.2	-0.8	--
2000	8.8	8.2	-0.8	--
2001	<b>9.2</b>	<b>8.5</b>	<b>-0.8</b>	--



	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Easy access to account information at any time</i>				
1999	9.0	8.2	-0.9	
2000	8.8	8.2	-0.7	+0.2
2001	<b>9.2</b>	<b>8.6</b>	<b>-0.6</b>	<b>+0.1</b>
<i>Friendly &amp; courteous employees</i>				
1999	9.5	8.7	-0.8	--
2000	9.4	8.8	-0.7	+0.1
2001	<b>9.7</b>	<b>8.8</b>	<b>-0.9</b>	<b>-0.2</b>

\* - New attribute included in the 2001 Tracking Study only

- ◆ Most notable, the largest gap rating is evident for “electricity at a reasonable cost” and “contributes back to the community”. Declining since the initial baseline study, the reasonable cost of electricity falls 2.6 percentage points below customer expectations in 2001 (2.2 and 2.5 points below expectations in 1999 and 2000 respectively). Similar to the evaluation last year (-2.7), Hydro’s initiatives to contribute back to the community continue to fall 2.6 points below expectation in 2001.
- ◆ The attributes “a company which has the customers best interest at heart “ (falls 1.8 points below expectations in 2000, and 2.2 points below in 2001) and “ education or information about electricity use” (falls 0.6 points below expectations in 2000 and 1.0 point below in 2001) exhibit the largest change in gap rating for 2001.
- ◆ Consistent with its higher performance ratings, the gap rating for “convenient methods of payment” continues to improve. In 1999, this attribute fell 1.1 points short of customer expectations, steadily improving to 0.7 point below expectations in 2001. Similarly, the attribute “easy access to account information at any time” continues to experience an improvement in service gap (0.9 points below in 1999 versus 0.6 points below in 2001).

## 13.0 NORTHERN REGION

### 13.1 Importance Factors Northern: Comparison of 2001, 2000 and 1999

	Very. Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All Imp.	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>							
1999	93.8	2.4	2.9	1.0	--	--	9.8
2000	95.5	3.0	1.5	--	--	--	9.8
2001	96.7	2.4	0.5	--	0.5	--	9.9
<i>Electricity at a reasonable cost</i>							
1999	88.9	8.2	1.9	--	1.0	--	9.6
2000	93.0	5.0	2.0	--	--	--	9.8
2001	94.8	2.8†	1.4	--	0.9	--	9.8
<i>Electricity quickly restored when there is a power outage</i>							
1999	92.3	6.7	1.0	--	--	--	9.7
2000	89.6	9.5	1.0	--	--	--	9.7
2001	93.8	5.2	0.9	--	--	--	9.8
<i>Bills easy to read and understand**</i>							
2001	92.9	7.1	--	--	--	--	9.8
<i>Billing Statement Accuracy**</i>							
2001	96.2	3.8	--	--	--	--	9.9
<i>Quick response to customer questions and inquiries</i>							
1999	88.0	8.6	1.4	--	1.0	1.0	9.5
2000	76.6*	17.4*	4.0	1.5	0.5	--	9.2
2001	89.1	10.0	0.9	--	--	--	9.7
<i>Convenient hours of operation</i>							
1999	84.1	7.7	3.8	--	1.4	2.9	9.4
2000	71.1*	21.9*	4.0	2.0	1.0	--	9.0
2001	88.6	9.5	0.9	--	0.5	0.5†	9.7
<i>Easy access to account information at any time</i>							
1999	81.3	9.1	7.7	1.0	1.0	--	9.3
2000	72.6*	15.4*	5.5	1.5	3.0	2.0	8.9
2001	87.7	9.5	0.5	--	1.4	0.9	9.6
<i>Able to complete equipment repairs and service right the first time</i>							
1999	96.2	2.9	1.0	--	--	--	9.7
2000	88.1*	10.0*	1.0	--	0.5	0.5	9.6
2001	91.9	4.3	1.9	--	0.9	0.9	9.7

	Very Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All Imp.	N/A	Mean
<b>Education or information about electricity use</b>							
1999	72.2	17.7	6.2	1.0	2.9	--	8.9
2000	57.7*	24.9*	10.9*	3.0	3.0	0.5	8.4
2001	73.0	16.6	6.6	0.9	--	2.8	9.2
<b>Friendly &amp; courteous employees</b>							
1999	89.0	6.7	1.0	1.0	1.4	1.0	9.6
2000	85.1	9.5	2.5	1.0	1.0	1.0	9.4
2001	91.5	5.7	1.4	--	0.5	0.9	9.7
<b>A company which has the customer's best interest at heart</b>							
1999	95.2	2.9	1.0	--	1.0	--	9.8
2000	88.6*	6.0	3.5*	1.0	1.0	--	9.5
2001	92.4	6.2	0.5	--	--	0.9	9.8
<b>Convenient methods of payment</b>							
1999	87.0	8.1	1.9	1.4	1.0	--	9.6
2000	84.6	12.4	1.0	1.0	--	1.0	9.5
2001	92.9	6.2	0.5	--	0.5	--	9.7
<b>Operates in an environmentally responsible manner</b>							
2000	79.1	15.9	1.5	0.5	0.5	2.5	9.4
2001	91.9	6.2	0.5	0.5	--	0.9	9.8
<b>Concern for public safety</b>							
2000	92.0	5.5	1.5	--	--	1.0	9.8
2001	99.1	0.9	--	--	--	--	10.0
<b>Contributes back to the community</b>							
2000	70.6	15.4	4.0	0.5	1.0	8.5	9.2
2001	80.1	10.4	1.4	0.5	0.9	6.6	9.5

\*\* - New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ Consistent with previous tracking studies, Northern customers rate “concern for public safety” as the most important attribute of the services provided by their electric company (99% very important; 10.0 mean rating)
- ◆ In addition to public safety, Hydro customers attribute a high level of importance to “billing statement accuracy” (96% very important), and “a reliable, uninterrupted supply of electricity” (97% very important”).

- ◆ Although remaining constant as the least important attribute of service, “education and information about electricity use” has increased in importance among Northern customers, back to the levels first reported in 1999 (1999: 72% very important; 2000: 58% very important, 2001: 73% very important).
- ◆ In 2001, an increase in importance is evident among all of the attributes measured. The most significant shifts in importance occurs for the attribute “convenient hours of operation” (9.7 in 2001 from 9.0 in 2000) and “easy access to account information at any time” (9.6 in 2001 from 8.9 in 2000).

### 13.2 Performance Evaluation Northern: Comparison of 2001, 2000 and 1999

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>							
1999	49.3	36.8	9.6	0.5	2.9	1.0	8.0
2000	57.2	31.8	8.5	1.5	1.0	--	8.5
2001	<b>60.2†</b>	<b>24.6†</b>	<b>10.0</b>	<b>3.3†</b>	<b>1.9</b>	--	<b>8.5</b>
<i>Electricity at a reasonable cost</i>							
1999	13.5	36.1	34.1	5.3	9.6	1.4	6.2
2000	19.4	34.3	25.4*	8.5	11.9	0.5	6.3
2001	<b>19.9†</b>	<b>28.4†</b>	<b>29.4</b>	<b>11.4†</b>	<b>10.4</b>	<b>0.5</b>	<b>6.2</b>
<i>Electricity quickly restored when there is a power</i>							
1999	60.0	28.2	7.6	1.4	2.8	--	8.3
2000	54.7	32.8	10.0	2.0	0.5	--	8.4
2001	<b>56.9</b>	<b>25.1</b>	<b>10.9</b>	<b>2.8</b>	<b>3.3</b>	<b>0.9</b>	<b>8.3</b>
<i>Bills easy to read and understand**</i>							
2001	<b>79.6</b>	<b>16.6</b>	<b>2.4</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>	<b>9.3</b>
<i>Billing statement accuracy**</i>							
2001	<b>78.7</b>	<b>15.2</b>	<b>3.8</b>	<b>0.9</b>	<b>1.4</b>	--	<b>9.2</b>
<i>Quick response to customer questions and inquiries</i>							
1999	53.8	20.2	6.3	2.9	2.9	13.9	8.3
2000	46.3	22.4	13.4*	3.0	1.5	13.4	8.2
2001	<b>62.1</b>	<b>20.4</b>	<b>8.5</b>	<b>0.5</b>	<b>1.9</b>	<b>6.6</b>	<b>8.8</b>
<i>Convenient hours of operation</i>							
1999	67.0	17.2	4.8	2.9	0.5	7.7	8.8
2000	52.2*	26.9*	8.0	0.5	0.5	11.9	8.7
2001	<b>73.9</b>	<b>16.6</b>	<b>5.2</b>	<b>0.9</b>	--	<b>3.3</b>	<b>9.2</b>
<i>Easy access to account information at any time</i>							
1999	58.7	18.8	4.8	2.9	1.9	13.0	8.6
2000	56.2	16.9	5.5	2.0	1.0	18.4	8.7
2001	<b>66.8</b>	<b>17.5</b>	<b>5.7</b>	--	<b>0.5</b>	<b>9.5</b>	<b>9.1</b>

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>Able to complete equipment repairs and service right the first time</i>							
1999	60.6	24.0	6.3	0.5	--	8.7	8.6
2000	57.2	26.4	7.5	2.0	1.0	6.0	8.6
2001	<b>62.6</b>	<b>22.7</b>	<b>7.1</b>	<b>0.9</b>	<b>1.9</b>	<b>4.7</b>	<b>8.8</b>
<i>Education or information about electricity use</i>							
1999	43.1	30.1	10.0	5.7	4.3	6.7	7.6
2000	37.3	23.4	17.9*	6.0	5.0	10.4	7.4
2001	<b>47.9</b>	<b>24.6</b>	<b>12.3</b>	<b>5.2</b>	<b>2.4</b>	<b>7.6</b>	<b>8.1</b>
<i>Friendly &amp; courteous employees</i>							
1999	74.5	14.4	0.5*	1.0	--	9.6	9.2
2000	72.6	16.9	3.5†	2.0	1.0	4.0*	9.1
2001	<b>80.1</b>	<b>14.2</b>	<b>3.8</b>	--	<b>0.5</b>	<b>1.4†</b>	<b>9.3</b>
<i>A company which has the customer's best interest at</i>							
1999	57.9	21.5	9.6	2.9	1.9	6.2	8.2
2000	42.8*	26.9	16.4*	3.5	3.0	7.5	7.9
2001	<b>52.1</b>	<b>25.6</b>	<b>8.1</b>	<b>4.3</b>	<b>1.9</b>	<b>8.1</b>	<b>8.4</b>
<i>Convenient methods of payment</i>							
1999	78.8	14.4	3.8	1.9	--	1.0	9.0
2000	71.1*	16.4	3.5	2.0	2.0	5.0	9.0
2001	<b>79.6</b>	<b>15.6</b>	<b>3.3</b>	<b>0.5</b>	--	<b>0.9</b>	<b>9.3</b>
<i>Operates in an environmentally responsible manner</i>							
2000	56.7	16.4	7.0	0.5	0.5	18.9	8.9
2001	<b>66.4</b>	<b>16.6</b>	<b>5.2</b>	--	<b>0.5</b>	<b>11.4</b>	<b>9.1</b>
<i>Concern for public safety</i>							
2000	72.6	14.4	3.0	--	2.0	8.0	9.1
2001	<b>79.6</b>	<b>15.2</b>	<b>2.8</b>	--	--	<b>2.4</b>	<b>9.4</b>
<i>Contributes back to community</i>							
2000	20.4	9.0	7.0	5.0	12.4	46.3	6.3
2001	<b>19.9</b>	<b>13.3</b>	<b>8.1</b>	<b>5.2</b>	<b>10.0</b>	<b>43.6</b>	<b>6.6</b>

\*\* - New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ In Northern, customers rate Hydro favourably on the majority of the sixteen attributes included in the 2001 tracking study (6.2 to 9.4 mean rating out of 10). More specifically, a marginal increase in performance exists for most of the attributes, thus exceeding performance levels first measured in 1999.

- ◆ Moving up from second place in 2000, Northern customers now rate “concern for public safety” as the top performer (80% excellent: 9.4 mean rating). In close second, customers rate Hydro favourably on “bills easy to read and understand” (80% excellent: 9.3 mean rating).
- ◆ Similar to previous years, Northern customers continue to rate Hydro poorly on “electricity at a reasonable cost” (6.2 mean rating) and “contributions back to the community” (6.6 mean rating).
- ◆ A significant increase in performance rating is evident for “ quick response to customer questions and inquiries”, with 62% of customers rating Hydro as “excellent” on this point, compared to 54% of customers in 1999 and 46% of customers in 2000.
- ◆ At its highest point to date, Northern customers express a high level of satisfaction with “convenient hours of operation”, with the majority of customers now rating Hydro as “excellent” on this point (74%), and less often rating them as “good” (17%).

### 13.3 Service Gap Analysis Northern: Comparison of 2001, 2000 and 1999

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.

	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Electricity at a reasonable cost</i>				
1999	9.6	6.2	-3.4	
2000	9.8	6.3	-3.5	-0.1
2001	<b>9.8</b>	<b>6.2</b>	<b>-3.5</b>	--
<i>Contributes back to community</i>				
2000	9.2	6.3	-2.8	--
2001	<b>9.5</b>	<b>6.6</b>	<b>-2.7</b>	<b>+0.1</b>
<i>A company which has the customer's best interest at heart</i>				
1999	9.8	8.2	-1.6	--
2000	9.5	7.9	-1.6	--
2001	<b>9.8</b>	<b>8.4</b>	<b>-1.4</b>	<b>+0.2</b>
<i>A reliable, uninterrupted supply of electricity</i>				
1999	9.8	8.0	-1.7	--
2000	9.8	8.5	-1.3	+0.4
2001	<b>9.9</b>	<b>8.5</b>	<b>-1.4</b>	<b>-0.1</b>
<i>Electricity quickly restored when there is a power outage</i>				
1999	9.7	8.3	-1.5	--
2000	9.7	8.4	-1.3	+0.2
2001	<b>9.8</b>	<b>8.3</b>	<b>-1.5</b>	<b>-0.2</b>
<i>Able to complete equip. repairs/ service right the first time</i>				
1999	9.7	8.6	-1.1	
2000	9.6	8.6	-1.0	+0.1
2001	<b>9.7</b>	<b>8.8</b>	<b>-0.9</b>	<b>+0.1</b>



	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Quick response to customer questions and inquiries</i>				
1999	9.5	8.3	-1.2	
2000	9.2	8.2	-1.0	+0.2
2001	<b>9.7</b>	<b>8.8</b>	<b>-0.9</b>	<b>+0.1</b>
<i>Concern for public safety</i>				
2000	9.8	9.1	-0.7	--
2001	<b>10.0</b>	<b>9.4</b>	<b>-0.6</b>	<b>+0.1</b>
<i>Education or information about electricity use</i>				
1999	8.9	7.6	-1.3	
2000	8.4	7.4	-1.0	+0.1
2001	<b>9.2</b>	<b>8.1</b>	<b>-1.1</b>	<b>-0.1</b>
<i>Operates in an environmentally friendly manner</i>				
2000	9.4	8.9	-0.5	
2001	<b>9.8</b>	<b>9.1</b>	<b>-0.6</b>	<b>-0.1</b>
<i>Convenient methods of payment</i>				
1999	9.6	9.0	-0.5	
2000	9.5	9.0	-0.6	-0.1
2001	<b>9.7</b>	<b>9.3</b>	<b>-0.5</b>	<b>+0.1</b>
<i>Bills easy to read and understand*</i>				
2001	<b>9.8</b>	<b>9.3</b>	<b>-0.5</b>	<b>--</b>
<i>Billing Statement Accuracy*</i>				
2001	<b>9.9</b>	<b>9.2</b>	<b>-0.7</b>	<b>--</b>
<i>Convenient hours of operation</i>				
1999	9.4	8.8	-0.6	
2000	9.0	8.7	-0.3	+0.3
2001	<b>9.7</b>	<b>9.2</b>	<b>-0.5</b>	<b>-0.2</b>

	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Easy access to account information at any time</i>				
<b>1999</b>	9.3	8.6	-0.6	
<b>2000</b>	8.9	8.7	-0.1	+0.5
<b>2001</b>	<b>9.6</b>	<b>9.1</b>	<b>-0.4</b>	<b>-0.3</b>
<i>Friendly &amp; courteous employees</i>				
<b>1999</b>	9.6	9.2	-0.4	
<b>2000</b>	9.4	9.1	-0.3	+0.1
<b>2001</b>	<b>9.7</b>	<b>9.3</b>	<b>-0.4</b>	<b>-0.1</b>

\* - New attribute included in the 2001 Tracking Study only

- ◆ Similar to other service regions, the largest service gap exists with “electricity at a reasonable cost”, which falls 3.5 points below expectations in 2001. Second to cost, “contributes back to the community” exhibits a large gap of -2.7 points, reflecting a performance rating 2.7 points below customer expectations on this issue.
- ◆ The greatest improvement in gap rating occurs with “a company which has the customer’s best interests at heart”, with the gap decreasing to 1.4 points below customer expectations , compared to 1.6 points below expectations in previous studies. This is most likely attributable to a reported increase in performance among Northern customers on this point (2000: 7.9 mean rating; 2001: 8.4 mean rating).
- ◆ Although still an improvement over 1999 (-0.6 points), the gap rating associated with “easy access to account information at any time” increases slightly in 2001 (2001: -0.4 versus 2000: -0.1)

## 14.0 CENTRAL REGION

### 14.1 Importance Factors Central: Comparison of 2001, 2000 and 1999

	Very. Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All Imp.	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>							
1999	92.0	4.8	2.8	--	0.4	--	9.7
2000	97.0*	2.5	0.5	--	--	--	9.9
2001	<b>94.0</b>	<b>4.0</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>	<b>0.5</b>	<b>9.8</b>
<i>Electricity at a reasonable cost</i>							
1999	90.9	6.7	2.4	--	--	--	9.6
2000	92.0	5.5	2.5	--	--	--	9.7
2001	<b>97.0</b>	<b>2.5†</b>	--	<b>0.5</b>	--	--	<b>9.9</b>
<i>Electricity quickly restored when there is a power</i>							
1999	88.9	8.7	1.2	--	--	1.2	9.7
2000	93.5	4.5*	1.5	--	--	0.5	9.8
2001	<b>93.5</b>	<b>4.5†</b>	<b>1.5</b>	--	--	<b>0.5</b>	<b>9.8</b>
<i>Bills easy to read and understand**</i>							
2001	88.0	9.5	2.0	--	--	0.5	9.7
<i>Billing Statement Accuracy**</i>							
2001	95.0	4.5	0.5	--	--	--	9.8
<i>Quick response to customer questions and inquiries</i>							
1999	82.9	12.7	1.2	1.2	--	2.0	9.4
2000	74.0*	18.5	6.0*	0.5	--	1.0	9.2
2001	<b>85.5</b>	<b>11.5</b>	<b>1.0</b>	--	<b>0.5</b>	<b>1.5</b>	<b>9.6</b>
<i>Convenient hours of operation</i>							
1999	77.2	16.0	4.8	0.8	--	1.2	9.3
2000	75.0	15.5	8.0	0.5	0.5	0.5	9.1
2001	<b>80.5</b>	<b>12.5</b>	<b>2.5</b>	<b>0.5</b>	<b>0.5</b>	<b>3.5</b>	<b>9.5</b>
<i>Easy access to account information at any time</i>							
1999	81.3	17.1	0.4	1.2	--	--	9.3
2000	74.0*	18.5	6.0*	0.5	0.5	0.5	9.1
2001	<b>82.0</b>	<b>11.5</b>	<b>2.5</b>	<b>0.5</b>	<b>1.5</b>	<b>2.0</b>	<b>9.4</b>
<i>Able to complete equipment repairs and service right the first</i>							
1999	84.5	13.5	2.0	--	--	--	9.6
2000	89.0	8.0*	1.0	--	--	2.0	9.7
2001	<b>93.5†</b>	<b>5.0†</b>	<b>1.0</b>	--	--	<b>0.5</b>	<b>9.8</b>

	Very. Imp.	Somewhat Imp.	Neutral	Somewhat Unimp.	Not At All Imp.	N/A	Mean
<i>Education or information about electricity use</i>							
1999	59.4	27.5	11.2	0.8	--	1.2	8.7
2000	51.5	28.5	15.5	2.5	0.5	1.5	8.3
2001	67.5	22.0	7.0	1.5	--	2.0	9.0
<i>Friendly &amp; courteous employees</i>							
1999	88.8	10.0	1.2	--	--	--	9.5
2000	87.0	10.5	1.5	1.0	--	--	9.5
2001	90.0	7.5	1.0	0.5	--	1.0	9.7
<i>A company which has the customer's best interest at heart</i>							
1999	89.6	6.4	2.8	--	--	1.2	9.6
2000	85.5	9.5	4.0	--	--	1.0	9.5
2001	94.5	2.5	2.0	--	--	1.0	9.8
<i>Convenient methods of payment</i>							
1999	84.5	13.1	1.2	--	--	1.2	9.5
2000	81.5	15.0	2.5	0.5	--	0.5	9.3
2001	92.5	4.5	1.5	--	0.5	1.0	9.7
<i>Operates in an environmentally responsible manner</i>							
2000	86.0	10.5	1.5	0.5	--	1.5	9.6
2001	86.5	9.0	1.5	0.5	--	2.5	9.7
<i>Concern for public safety</i>							
2000	96.5	3.0	0.5	--	--	--	9.8
2001	97.0	2.0	0.5	--	--	0.5	9.9
<i>Contributes back to community</i>							
2000	61.0	21.5	4.5	1.0	--	12.0	9.1
2001	76.5	15.0	1.5	--	0.5	6.5	9.5

\*\* New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ This year, Central customers rate “electricity at a reasonable cost” and “concern for public safety” as the most important attributes of service (97% rated “very important” and 9.9 mean rating, respectively). This most likely reflects a continued increase in the rated importance of the attribute since the initial baseline study in 1999, with respondents less likely to rate the attribute as “important” and more likely to rate it “very important”.
- ◆ Similar to the other areas, almost all of the attributes experience a marginal increase in rated importance in 2001. The largest increase in importance rating is evident with “education or information about electricity use”, with 68% of customers rating this attribute as “very important”, compared to 52% of customers in 2000 (1999: 59% “very important”).

- ◆ An increase in importance levels occurs for the attributes “quick response to customer questions and inquiries” (2001: 9.6 mean rating, 2000: 9.2 mean rating, 1999: 9.4 mean rating) and “convenient hours of operation” (2001: 9.5 mean rating, 2000: 9.1 mean rating and 1999: 9.3 mean rating), with both attributes increasing to the highest importance levels to date.

## 14.2 Performance Evaluation Central: Comparison of 2001, 2000 and 1999

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>A reliable, uninterrupted supply of electricity</i>							
1999	59.0	24.3	12.4	3.6	0.8	--	8.8
2000	72.0*	20.5	6.5	0.5*	0.5	--	9.0
2001	60.0	31.5	6.5	1.5	0.5	--	8.7
<i>Electricity at a reasonable cost</i>							
1999	17.5	28.7	28.3	10.0	13.5	2.0	6.2
2000	26.0*	36.5*	22.0	6.0	9.0	0.5	6.8
2001	29.5†	34.0	25.0	4.5†	5.5†	1.5	7.1
<i>Electricity quickly restored when there is a power outage</i>							
1999	49.0	36.7	10.8	2.8	0.8	--	8.6
2000	59.5*	29.5	7.0	2.0	1.5	0.5	8.6
2001	63.0†	25.5†	10.0	0.5†	0.5	0.5	8.7
<i>Bills easy to read and understand**</i>							
2001	86.0	10.5	3.0	--	--	0.5	9.4
<i>Billing statement accuracy**</i>							
2001	85.5	11.5	1.0	0.5	0.5	1.0	9.5
<i>Quick response to customer questions and inquiries</i>							
1999	41.0	20.0	8.0	2.8		28.3	8.6
2000	50.0	20.5	8.0	2.5	1.0	18.0*	8.5
2001	61.0	17.0	6.0	--	--	16.0†	9.1
<i>Convenient hours of operation</i>							
1999	64.1	16.0	6.0	2.0		12.0	9.1
2000	61.5	23.0*	5.0	0.5	0.5	9.5	8.9
2001	68.5	13.5	3.0	1.0	--	14.0	9.3
<i>Easy access to account information at any time</i>							
1999	56.0	21.0	3.2	1.2	--	18.7	9.0
2000	60.5	14.0*	4.0	1.0	--	20.5	9.1
2001	63.5	14.0†	5.5	--	1.0	16.0	9.1
<i>Able to complete equipment repairs and service right the first</i>							
1999	60.3	25.0	7.5		2.0	5.2	8.9
2000	62.0	20.5	3.5	1.5	1.0	11.5*	8.9
2001	71.5	19.0	3.0†	0.5	0.5	5.5	9.2
<i>Education or information about electricity use</i>							
1999	38.5	24.2	11.1	12.3	3.2	10.7	7.7
2000	41.5	27.5	16.0	3.5*	2.0	9.5	7.9
2001	45.0	24.5	7.5	2.0†	5.5	15.5	8.2

	Excellent	Good	Neutral	Poor	Very Poor	N/A	Mean
<i>Friendly &amp; courteous employees</i>							
1999	70.2	17.1	1.2		2.0	9.5	9.2
2000	76.5	13.0	5.0*	--	--	5.5	9.3
2001	82.0†	10.0†	1.0†	1.0	--	6.0	9.5
<i>A company which has the customer's best interest at heart</i>							
1999	42.7	31.6	12.6	4.7	3.2	5.1	7.9
2000	47.5	27.0	16.0	2.5	3.0	4.0	8.0
2001	56.0	23.0†	11.0	1.5†	1.5	7.0	8.6
<i>Convenient methods of payment</i>							
1999	74.6	20.2	2.4	0.8		2.0	9.2
2000	76.5	18.0	3.0	0.5	--	2.0	9.2
2001	81.5†	10.5	3.0	--	1.5	3.5	9.4
<i>Operates in an environmentally responsible manner</i>							
2000	65.5	18.0	2.5	0.5	--	13.5	9.2
2001	64.0	16.0	2.0	--	--	18.0	9.3
<i>Concern for public safety</i>							
2000	74.0	18.0	2.0	0.5	--	5.5	9.3
2001	80.5	14.0	1.5	0.5	--	3.5	9.5
<i>Contributes back to community</i>							
2000	13.5	13.0	6.0	5.0	10.5	52.0	6.1
2001	27.5	16.0	9.5	1.0	10.5	35.5	7.2

\* \*- New attribute included in the 2001 Tracking Study only

■ - indicates significant differences at the 90% confidence level (See Appendix C for explanation)

† - indicates significant differences at the 90% confidence level between 1999 and 2001 data

\* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

- ◆ In 2001, there is an increase in performance ratings for most of the service attributes. The attributes experiencing the most significant increases include:
  - “Contributes back to the community” (2001: 7.2 mean rating versus 2000: 6.1 mean rating)
  - “Quick response to customer questions and inquiries” (2001: 9.1 mean rating versus 2000: 8.5 mean rating).
  - “A company which has the customers best interest at heart” (2001: 8.6 mean rating versus 2000: 8.0 mean rating).
  
- ◆ Displacing last year’s top performer “friendly and courteous employees”, Central customers rate Hydro most favorably on “billing statement accuracy” and “concern for public safety” (9.5 mean rating, respectively).
  
- ◆ In Central, customers rate Hydro most poorly on “electricity at a reasonable cost” (7.1 mean rating).
  
- ◆ In 2000, customers were most dissatisfied with Hydro’s contribution back to the community , however in 2001, the performance rating for this attribute increased (2001: 7.2 mean rating versus 2000: 6.1). This is most likely attributable to an increase in the percentage of customers aware of Hydro’s community contributions (2001: 36% don’t know versus 2000: 52% don’t know) and those customers rating Hydro “excellent” on this issue (2001: 28%, 2000: 14%).
  
- ◆ In 2001, a decline in performance rating exists with the attribute “a reliable, uninterrupted supply of electricity”. This year, Hydro customers were less likely to rate Hydro “excellent” on this attribute and more likely to rate them as “good”(2001: 60% excellent versus 2000: 72% excellent)



### 14.3 Service Gap Analysis Central: Comparison of 2001, 2000 and 1999

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.

	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Electricity at a reasonable cost</i>				
1999	9.6	6.2	-3.4	--
2000	9.7	6.8	-2.9	+0.5
2001	<b>9.9</b>	<b>7.1</b>	<b>-2.8</b>	<b>+0.1</b>
<i>Contributes back to community</i>				
2000	9.1	6.2	-2.5	--
2001	<b>9.5</b>	<b>7.2</b>	<b>-2.3</b>	<b>+0.2</b>
<i>A company which has the customer's best interest at heart</i>				
1999	9.6	7.9	-1.7	--
2000	9.5	8.0	-1.5	+0.2
2001	<b>9.8</b>	<b>8.6</b>	<b>-1.3</b>	<b>+0.2</b>
<i>A reliable, uninterrupted supply of electricity</i>				
1999	9.7	8.8	-0.9	--
2000	9.9	9.0	-0.9	--
2001	<b>9.8</b>	<b>8.7</b>	<b>-1.1</b>	<b>-0.2</b>
<i>Electricity quickly restored when there is a power outage</i>				
1999	9.7	8.6	-1.1	--
2000	9.8	8.6	-1.2	-0.1
2001	<b>9.8</b>	<b>8.7</b>	<b>-1.1</b>	<b>+0.1</b>

	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Able to complete equip. repairs/ service right the first time</i>				
1999	9.6	8.9	-0.7	--
2000	9.7	8.9	-0.8	-0.1
2001	<b>9.8</b>	<b>9.2</b>	<b>-0.6</b>	<b>+0.2</b>
<i>Quick response to customer questions and inquiries</i>				
1999	9.4	8.6	-0.7	--
2000	9.2	8.5	-0.6	+0.1
2001	<b>9.6</b>	<b>9.1</b>	<b>-0.5</b>	<b>+0.1</b>
<i>Concern for public safety</i>				
2000	9.8	9.3	-0.5	--
2001	<b>9.9</b>	<b>9.5</b>	<b>-0.4</b>	<b>+0.1</b>
<i>Education or information about electricity use</i>				
1999	8.7	7.7	-1.0	
2000	8.3	7.9	-0.4	+0.6
2001	<b>9.0</b>	<b>8.2</b>	<b>-0.9</b>	<b>-0.5</b>
<i>Operates in an environmentally friendly manner</i>				
2000	9.6	9.2	-0.3	--
2001	<b>9.7</b>	<b>9.3</b>	<b>-0.4</b>	<b>-0.1</b>
<i>Convenient methods of payment</i>				
1999	9.5	9.2	-0.3	--
2000	9.3	9.2	-0.1	+0.2
2001	<b>9.7</b>	<b>9.4</b>	<b>-0.3</b>	<b>-0.2</b>
<i>Bills easy to read and understand*</i>				
2001	<b>9.7</b>	<b>9.4</b>	<b>-0.2</b>	--
<i>Billing Statement Accuracy*</i>				
2001	<b>9.8</b>	<b>9.5</b>	<b>-0.4</b>	--

	<b>IMPORTANCE Mean Rating</b>	<b>PERFORMANCE Mean Rating</b>	<b>GAP Mean Rating</b>	<b>% Change</b>
<i>Convenient hours of operation</i>				
1999	9.3	9.1	-0.2	--
2000	9.1	8.9	-0.2	--
2001	<b>9.5</b>	<b>9.3</b>	<b>-0.3</b>	<b>-0.1</b>
<i>Easy access to account information at any time</i>				
1999	9.3	9.0	-0.3	
2000	9.1	9.1	-0.1	+0.2
2001	<b>9.4</b>	<b>9.1</b>	<b>-0.4</b>	<b>-0.3</b>
<i>Friendly &amp; courteous employees</i>				
1999	9.5	9.2	-0.3	
2000	9.5	9.3	-0.2	+0.1
2001	<b>9.7</b>	<b>9.5</b>	<b>-0.2</b>	<b>--</b>

\* - New attribute included in the 2001 Tracking Study only

- ◆ In Central, the largest gap is associated with the cost of electricity, reflecting a performance rating 2.8 points below customer expectations. Second to cost, the greatest gap exists with Hydro’s initiatives to contribute to the community (-2.3 gap). However, both of the gap scores associated with these attributes have improved since 2000, reflecting an increase in the performance rating.
- ◆ Although the gap for “a company which has the customer’s best interest at heart” remains high, it has been steadily improving since the initial study (2001: -1.3 gap rating, 2000:-1.5, 1999: -1.7). This is most likely attributable to a slightly higher importance rating, in addition to an improved performance rating.
- ◆ Compared to last year’s study, the gap for “education or information about electricity use” has again increased to levels first reported in 1999 (2001: -0.9 mean rating; 2000: -0.4 mean rating; 1999: -1.0 mean rating). Most likely, this reflects an increase in the rated importance of the attribute among Central customers.

## **APPENDIX A: SURVEY INSTRUMENT**

## Customer Satisfaction Survey September 2001

Hello, my name is \_\_\_\_\_ from Market Quest Research, a professional marketing research firm. Today/tonight we are conducting a short survey on household electricity. May I please speak to the adult who is primarily responsible for paying your home electric bill and 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. Do you or does anyone in your household or immediate family work for:

	<b>Yes</b>	<b>No</b>
an electric company	1	2
an advertising or marketing research firm	1	2

**IF YES TO ANY OF THE ABOVE - THANK & TERMINATE**

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

	<u>NF &amp; LAB. HYDRO</u>	<u>NF POWER</u>	<u>D/K OR N/A</u>
<i>...Supplies electricity to your permanent home or where you spend the majority of your time?</i>	1	2	3
<i>...Supplies electricity to a temporary dwelling such as a cabin, cottage or summer home?</i>	1	2	3

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

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. Your household has been randomly selected to participate in this survey. 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.

2. 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 you and your household. 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												
Convenient hours of operation												
Easy access to account information at any time												
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												
Convenient methods of payment												
Operates in an environmentally responsible manner												
Concern for public safety												
Contributes back to the community through initiatives such as community sponsorship programs												

3. 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
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

**BILLING**

4. Currently, the electric bill you receive each month is for your household’s use of electricity in that particular month. Equal payment plan is a different method of billing, whereby customers are billed an equal amount over 12 months. Although you pay equal amounts, you are still required to pay for the electricity you actually use. At the end of the year, if your household used more or less electricity than the amount paid, your equal payment is adjusted being either increased or decreased for each month in the next year. If NF & Lab. Hydro was to offer an equal payment plan, would you definitely use, likely use or not likely use this service...

Definitely Use	1
Likely Use	2
Not Likely Use	3
Don’t Know	4

5. If NF and Lab. Hydro were to offer a pre authorized bill payment option, where the amount of your bill is automatically deducted from your bank account each month ...would you definitely use, likely use, or not likely use this option?

Definitely Use	1
Likely Use	2
Not Likely Use	3
Don’t Know	4

6. Do you have access to the Internet.... **[READ LIST]**

	Yes	No	N/A
At home	1	2	3
At work	1	2	3
At School	1	2	3

**IF YES TO ANY OF THE ABOVE CONTINUE, ELSE GO TO Q9**

7. If NF & Lab. Hydro were to offer access to your **[READ LIST]** over the Internet, how likely you would be to use this service... would you definitely use, likely use or not likely use this service...

	Definitely Use	Likely Use	Not Likely Use	D/K
a) Account Balance	1	2	3	4
b) Account History	1	2	3	4
c) Bill Payment Options	1	2	3	4



8. If NF & Lab. Hydro were to offer a payment option where you could pay your electricity bill over the Internet, directly to NF and Lab. Hydro.. how likely would you be to use this service.. would you definitely use, likely use or not likely use this service...

Definitely Use	1
Likely Use	2
Not Likely Use	3
Don't Know	4

**GENERAL**

9. Now please think of electric companies as serving customers in two ways: (1) the first, being the supply of electricity to your home 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		

10. 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....*

- 11. For approximately how many years have you been a customer of NF & Lab. Hydro? \_\_\_\_\_years
- 12. In which community do you live? \_\_\_\_\_
- 13. In what year were you born? 19\_\_\_\_\_

14. What is the highest level of education you have completed? [READ LIST]

Elementary School	1
Some High School	2
Graduated High School	3
Vocational/Technical College	4
Some University	5
Graduated University	6
Refused	7

15. Which of the following best describes your present employment status? [READ LIST]

Working full time	1
Working part time	2
Working seasonally	3
Unemployed	4
Homemaker	5
Retraining / upgrading	6
Retired	7

16. Which of the following best describes your total household income (before taxes)? [READ LIST]

\$20,000 and under	1
\$20,001 to \$40,000	2
\$40,001 to \$60,000	3
\$60,001 to \$80,000	4
\$80,001 and over	5
Refused	6

*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. In case my supervisor would like to verify this survey, may I have your first name or initials \_\_\_\_\_.*

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

**INTERVIEWER USE ONLY:**

Gender:		Region:		Community:	
Male	1	Labrador	1	Interconnected	1
Female	2	Northern	2	Isolated	2
		Central	3		


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

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

Data Entry: \_\_\_\_\_

## **APPENDIX B: THEORY OF Z-TESTS**

Throughout this report, significant differences between proportions are indicated by a shaded area and the following footnote:

-  - indicates a significant difference at the 90% confidence level
- † - indicates significant differences at the 90% confidence level between 1999 and 2001 data
- \* - indicates significant differences at the 90% confidence level between 1999 and 2000 data

Sometimes the focus of attention in a table might be on the percentage of respondents from two different groups (for example from two different areas). When data is segmented by groups, in most situations, it is of value to test for a difference between two proportions or groups.

When interested in comparing two population proportions from two independent samples, the focus of statistical testing is concentrated on the size of the difference between the two percentages. To test for a statistical difference, the null hypothesis is the hypotheses which is tested, that is, that there is no difference between the proportions. To determine if the difference in the proportions is significant a z-score is used. The distance that this measurement lies above or below the mean of the data set, measured in units of standard deviation is called the z-score for the measurement.

In the Marketing Research Industry it is typical to use a 90% confidence coefficient as the critical value or a z-score of 1.64. This specifies what is known as the “reject region” for the null hypothesis. When the difference between the measures indicates a z-score either above or below this critical value (1.64), the difference is considered significant. That is, there is evidence to suggest that the null hypothesis should be rejected and that a statistical difference between the two proportions exists and is not due to uncontrollable sampling error.