

1 Q. Please provide a copy of Hydro's most recent customer survey and results of the
2 same.

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5 A. A copy of Hydro's most recent customer satisfaction survey and results is attached.

2012 Residential Customer Satisfaction Tracking Study



Study Methodology

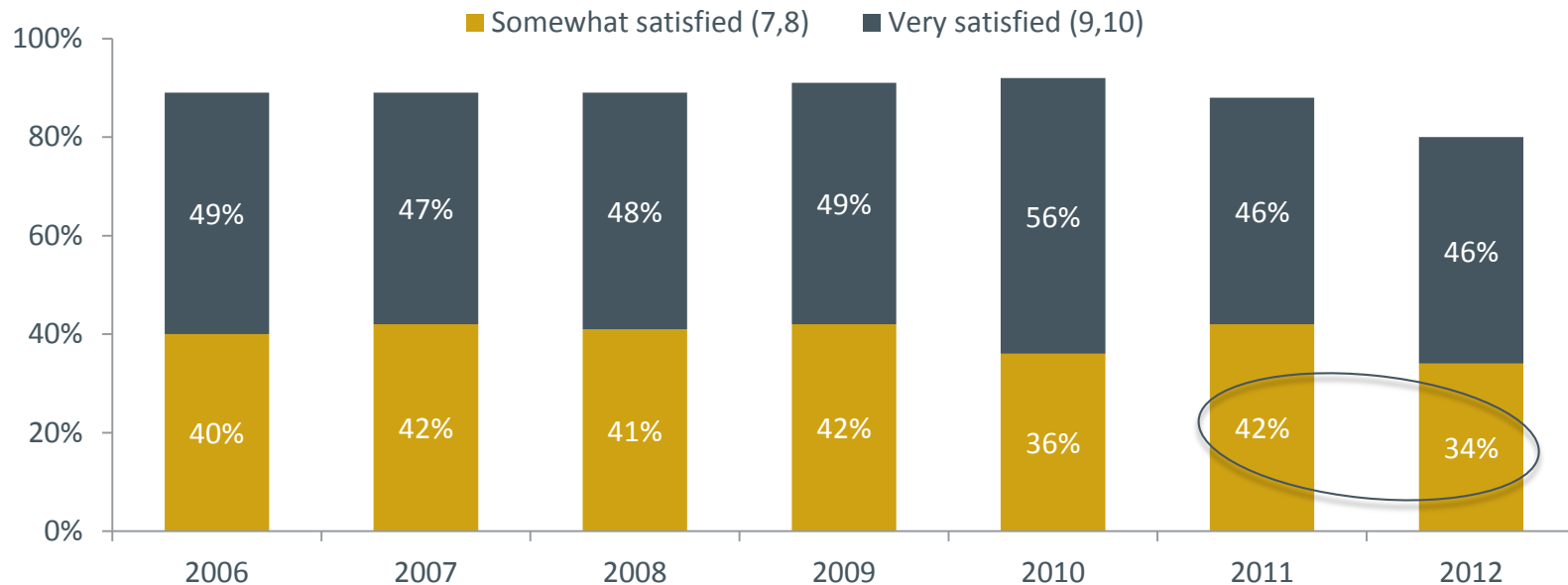
- For this research study, Hydro's residential customers were surveyed via telephone.
- The pre-test occurred on November 29th and interviews were conducted between November 30th and December 10th, 2012.
- The sampling unit was the adult household member responsible for paying the electricity bill and dealing with Hydro.
- To allow for analysis by region and rate area, disproportionate stratified sampling was used to draw a random sample from the following areas: **Labrador West** (n=105), **Happy Valley/Goose Bay** (n=105), **Labrador Isolated** (n=85), **Northern Interconnected** (n=115), **Northern Isolated** (n=55), **Southern Labrador** (n=94), **Central Interconnected** (n=121) and **Central Isolated** (n=46).
- Due to the use of disproportionate sampling, regional weights were applied to ensure that the sample was a proportionate representation of the population at the overall level.

Study Methodology (cont'd)

- A total of 726 residential customers completed the survey, which provides a margin of error of $\pm 3.6\%$, 19 times out of 20.
- This year NL Hydro conducted qualitative research with their residential customers and as a result, for 2012, the annual tracking survey was condensed considerably and covered the following areas:
 - ▣ Overall satisfaction with Hydro;
 - ▣ Satisfaction with the supply of electricity received from Hydro; and
 - ▣ Satisfaction with the overall customer service received from Hydro.
- The survey also included demographic questions (age and gender).
- The following slides present the results of the *2012 Residential Customer Satisfaction Tracking Study*.

Overall Satisfaction

- Customers were asked to rate their overall satisfaction with Hydro using a scale of 1 to 10 where 1 is '**not at all satisfied**' and 10 is '**very satisfied**'. The majority of customers (80%) are either **very satisfied** (46% provided a rating of 9 or 10) or **somewhat satisfied** (34% provided a rating of 7 or 8) with Hydro.
- Compared to last year, the proportion of customers who provided a rating of 7 or 8 **decreased significantly** from 42% to 34% however; the proportion who provided a rating of 9 or 10 held steady.
- In 2012, there was an **increase** in the proportion of customers who provided a rating of 5 or 6 (from 9% in 2011 to 14% in 2012). **Although these results indicate slippage in customer satisfaction, results remain positive as the majority of customers are satisfied with Hydro.**



Q1. In general, how satisfied are you with Hydro on a scale of 1 to 10 where 1 means '**not at all satisfied**' and 10 means '**very satisfied**'?

Overall Satisfaction (cont'd)

- From a regional perspective, compared to 2011, the proportion of customers in **Central** and **Northern** who provided a rating of 7 or higher **decreased significantly**.
- The proportion of customers in **interconnected areas** who provided a rating of 7 or higher **decreased significantly** from 89% in 2011 to 80% in 2012.

	2012 % Indicating 7+	2011 % Indicating 7+	2010 % Indicating 7+
Overall	80%	88%	92%
Region			
<i>Central</i>	77%	94%	95%
<i>Northern</i>	83%	91%	95%
<i>Labrador</i>	80%	78%	86%
Rate Area			
<i>Interconnected</i>	80%	89%	93%
<i>Isolated</i>	80%	83%	89%

Overall Satisfaction (cont'd)

- As previously mentioned, overall, the proportion of customers who provided a rating of 5 or 6 **increased** from 9% in 2011 to 14% in 2012.
- The table below details the proportion of customers who provided a rating of 5 or 6 by region and rate area. The highlighted cells indicate **significant increases**.
- So in terms of overall satisfaction there has been **slippage** in the proportion of customers who provided a rating of 7 or 8 and an **increase** in the proportion who provided a rating of 5 or 6.

	2012 % Indicating 5 or 6	2011 % Indicating 5 or 6
Overall	14%	9%
Region		
<i>Central</i>	16%	4%
<i>Northern</i>	12%	7%
<i>Labrador</i>	16%	18%
Rate Area		
<i>Interconnected</i>	15%	9%
<i>Isolated</i>	16%	11%

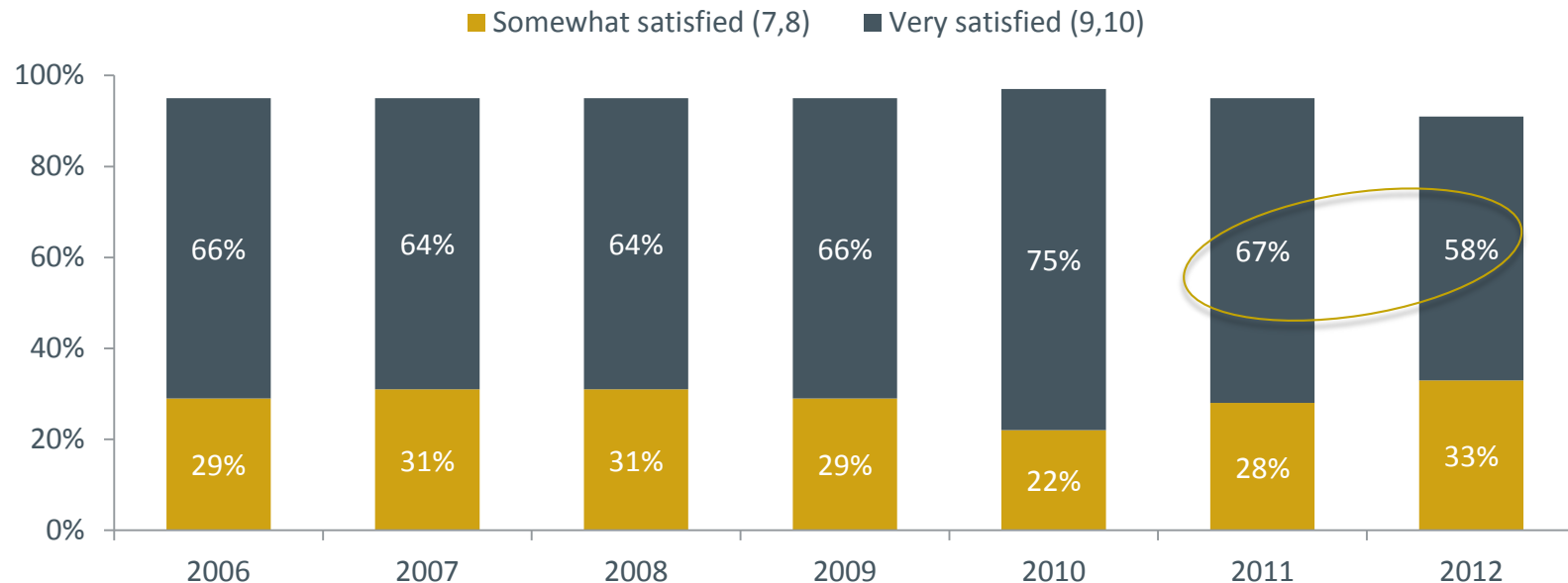
Overall Satisfaction (cont'd)

- The table below details overall satisfaction results by age and gender.
- Elderly customers (those 70 years of age or older) are ***significantly*** more likely to be very satisfied with Hydro.
- Female customers are ***significantly*** more likely than male customers to be very satisfied with Hydro.

	2012 % Indicating 9 or 10
Overall	46%
Age	
<i>20-39 years</i>	41%
<i>40-59 years</i>	40%
<i>60-69 years</i>	51%
<i>70 years or older</i>	74%
Gender	
<i>Male</i>	42%
<i>Female</i>	49%

Service Reliability

- To determine satisfaction with Hydro's service reliability, customers were asked to rate their satisfaction with the supply of electricity they receive from Hydro using a scale of 1 to 10, with 1 being '**not at all satisfied**' and 10 being '**very satisfied**'.
- The vast majority of customers (91%) are satisfied with the supply of electricity received from Hydro (58% **very** satisfied; 33% **somewhat** satisfied). Compared to last year, the proportion of customers who provided a rating of 9 or 10 **decreased** from 67% to 58% and the proportion of customers who provided a rating of 7 or 8 **increased** from 28% to 33%.



Q2. On a scale of 1 to 10 where 1 means '**not at all satisfied**' and 10 means '**very satisfied**', how satisfied are you with the supply of electricity you receive from Hydro?

Service Reliability (cont'd)

- As detailed in the table below, the top two score ***decreased significantly*** from 2011 for both the ***Central*** and ***Northern*** region. In terms of rate area, satisfaction with service reliability ***decreased significantly*** for those in ***interconnected areas*** for the second consecutive year.

	2012 % Indicating 9 or 10	2011 % Indicating 9 or 10	2010 % Indicating 9 or 10
Overall	58%	67%	75%
Region			
Central	66%	77%	82%
Northern	58%	68%	82%
Labrador	49%	53%	60%
Rate Area			
Interconnected	60%	68%	77%
Isolated	52%	57%	63%

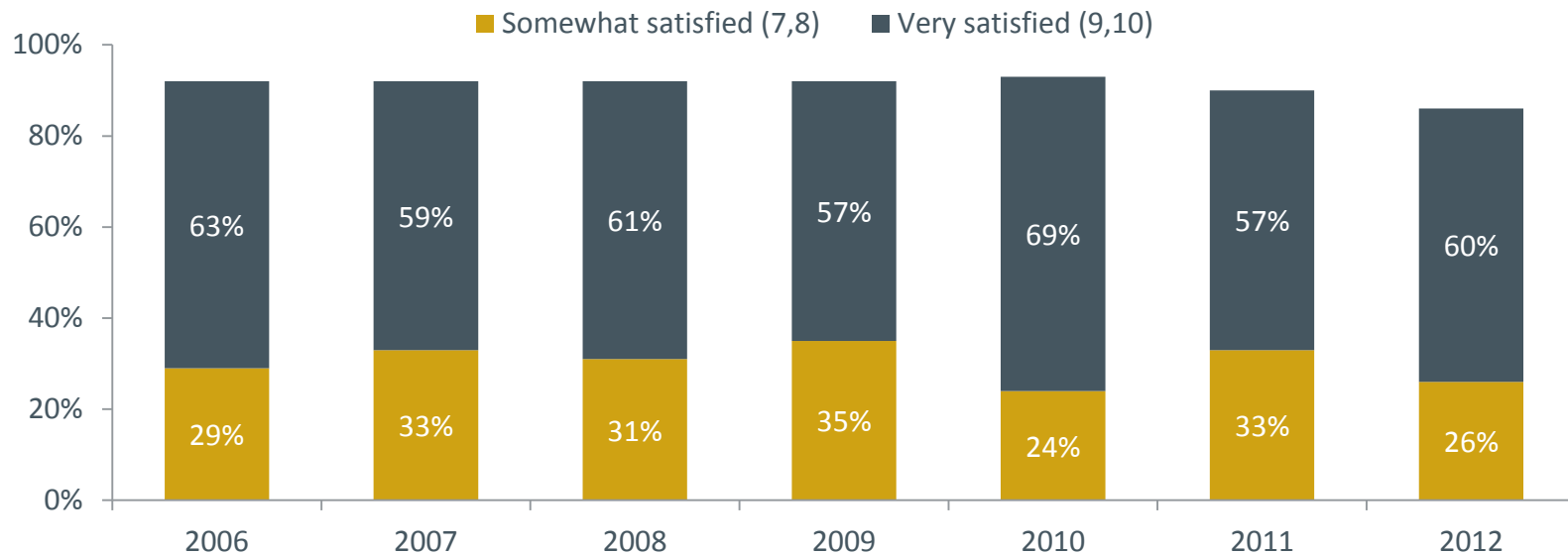
Service Reliability (cont'd)

- The table below details service reliability results by age and gender.
- Seventy-three percent of those aged 70 years or older provided a rating of 9 or 10.
- Female customers are ***significantly*** more likely than male customers to be very satisfied with Hydro's service reliability.

	2012 % Indicating 9 or 10
Overall	58%
Age	
<i>20-39 years</i>	53%
<i>40-59 years</i>	56%
<i>60-69 years</i>	63%
<i>70 years or older</i>	73%
Gender	
<i>Male</i>	52%
<i>Female</i>	63%

Customer Service

- Customers were asked to rate their satisfaction with the customer service they receive from Hydro on a scale of 1 to 10, with 1 being '**not at all satisfied**' and 10 being '**very satisfied**'.
- A large majority of customers (86%) are satisfied with the customer service they receive from Hydro (60% **very** satisfied; 26% **somewhat** satisfied).
- Compared to 2011, there is a directional **increase** in the proportion of customers who provided a rating of 9 or 10.



Q3. On a scale of 1 to 10 where 1 means '**not at all satisfied**' and 10 means '**very satisfied**', how satisfied are you with the overall customer service you receive from Hydro?

Customer Service (cont'd)

- The table below details the proportion of customers who provided a rating of 9 or 10 by region and rate area.
- Analysis revealed no significant differences from 2011 to 2012 by either region or rate area.

	2012 % Indicating 9 or 10	2011 % Indicating 9 or 10	2010 % Indicating 9 or 10
Overall	60%	57%	69%
Region			
<i>Central</i>	65%	65%	75%
<i>Northern</i>	62%	61%	77%
<i>Labrador</i>	49%	43%	54%
Rate Area			
<i>Interconnected</i>	60%	58%	70%
<i>Isolated</i>	58%	55%	61%

Customer Service (cont'd)

- The table below details customer service results by age and gender.
- Elderly customers (those 70 years of age or older) are **significantly** more likely to be very satisfied with the customer service they receive from Hydro.
- Female customers are **significantly** more likely than male customers to be very satisfied with Hydro's customer service.

	2012 % Indicating 9 or 10
Overall	60%
Age	
<i>20-39 years</i>	44%
<i>40-59 years</i>	56%
<i>60-69 years</i>	64%
<i>70 years or older</i>	86%
Gender	
<i>Male</i>	53%
<i>Female</i>	64%

Summary

- **The majority of residential customers are satisfied with the performance of Hydro.** Forty-six percent provided a rating of 9 or 10 when asked to rate their overall satisfaction with Hydro using a 10-point scale with 1 being *'not at all satisfied'* and 10 being *'very satisfied'*. Thirty-four percent provided a rating of 7 or 8. Compared to 2011 results, the proportion of customers who provided a rating of 7 or 8 **decreased** from 42% in 2011 to 34% in 2012. In 2012 there was an **increase** in the proportion of customers who provided a rating of 5 or 6. *Although these results indicate slippage in customer satisfaction, results remain positive as the majority of customers are satisfied with Hydro. It is important to consider whether recent events (such as power outages or winter weather) could be impacting results.*
- **Residential customers continue to be satisfied with Hydro's service reliability.** Fifty-eight percent provided a rating of 9 or 10 when asked to rate their satisfaction with the supply of electricity they receive from Hydro using a scale of 1 to 10, with 1 being *'not at all satisfied'* and 10 being *'very satisfied'*. Thirty-three percent provided a rating of 7 or 8.
- **Residential customers are satisfied with the customer service received from Hydro.** A large majority of customers (86%) provided a rating of 7 or higher when asked to rate their satisfaction with the customer service received from Hydro using a 10-point scale with 1 being *'not at all satisfied'* and 10 being *'very satisfied'*. Compared to 2011, there is a directional **increase** in the proportion of customers who provided a rating of 9 or 10.