



What customers are saying about public power

A real-time review of national data to better understand an audience with evolving expectations and needs



Presentation

17 September 2018
Confidential & Proprietary

Unique Solutions

GreatBlue's 39 years of service enables thoughtful, strategic design that ensures effective & statistically reliable data

Creation of unique data collection and research solutions to help our clients achieve their business objectives

Diverse methodologies to maximize audience reach and response rates

Proven and constantly refined development and implementation process

Complex needs and challenges successfully navigated in heavily regulated industries

Areas of Investigation

A typical Public Power research study leverages a multi-mode quantitative research methodology to address the following areas of investigation:

- Perceptions of public power (what is known vs. what matters to them)
- Preferred communication mediums
- Understanding rates and levels of service
- Expectations from public power provider
- Needs and services requested
- Drivers/Barriers to engaging with the respective public power provider in the future
- What information is desired and how frequently
- Demographic profile of respondents

Redefining Data :: PPDS

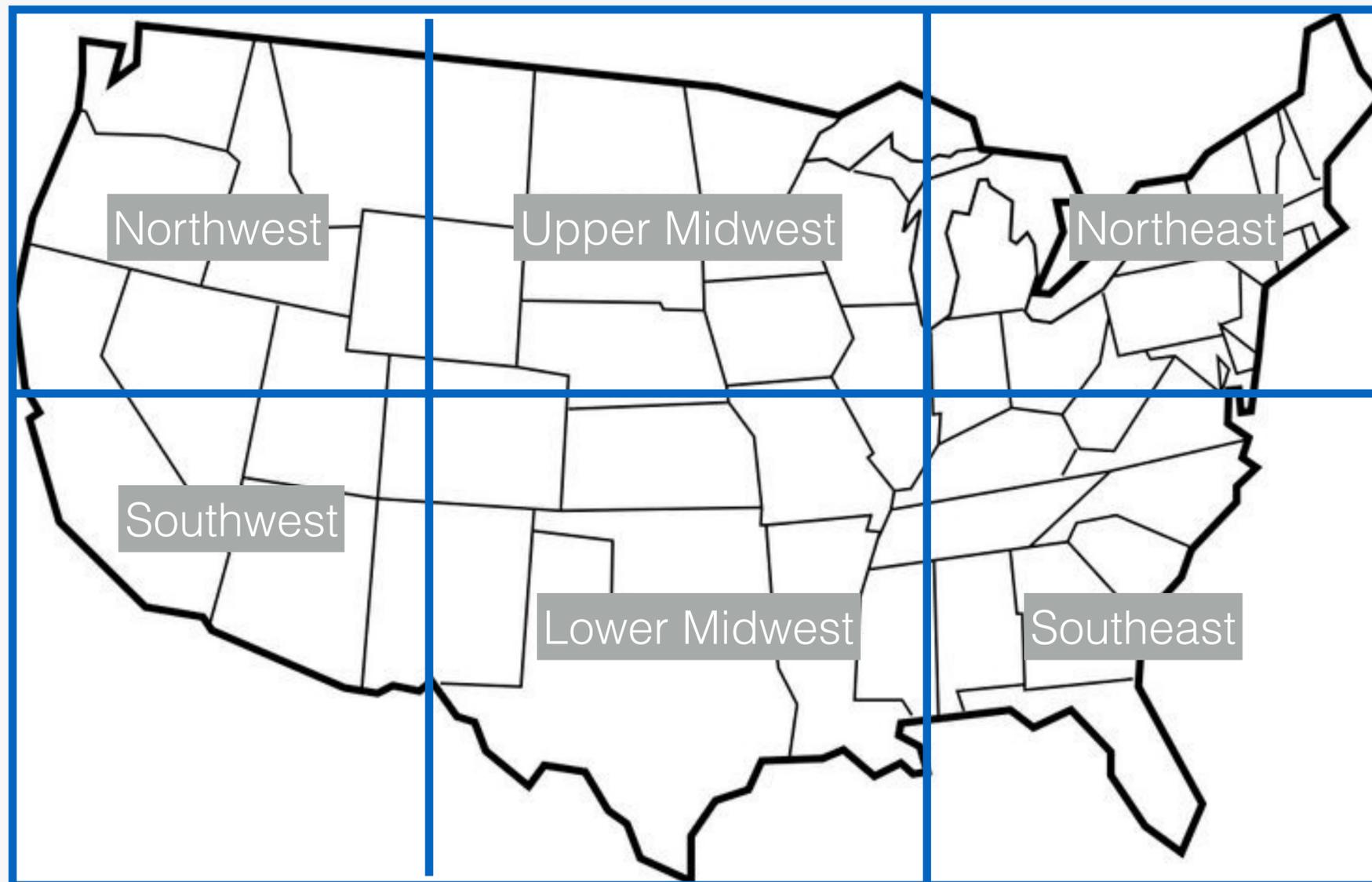
National/Regional reporting and actionable analysis

Online, subscription based product with quarterly deliverables

Highlight relevant topics, trends, challenges

Custom research experience for a fraction of the price

Public Power Data Source :: Sample Breakdown

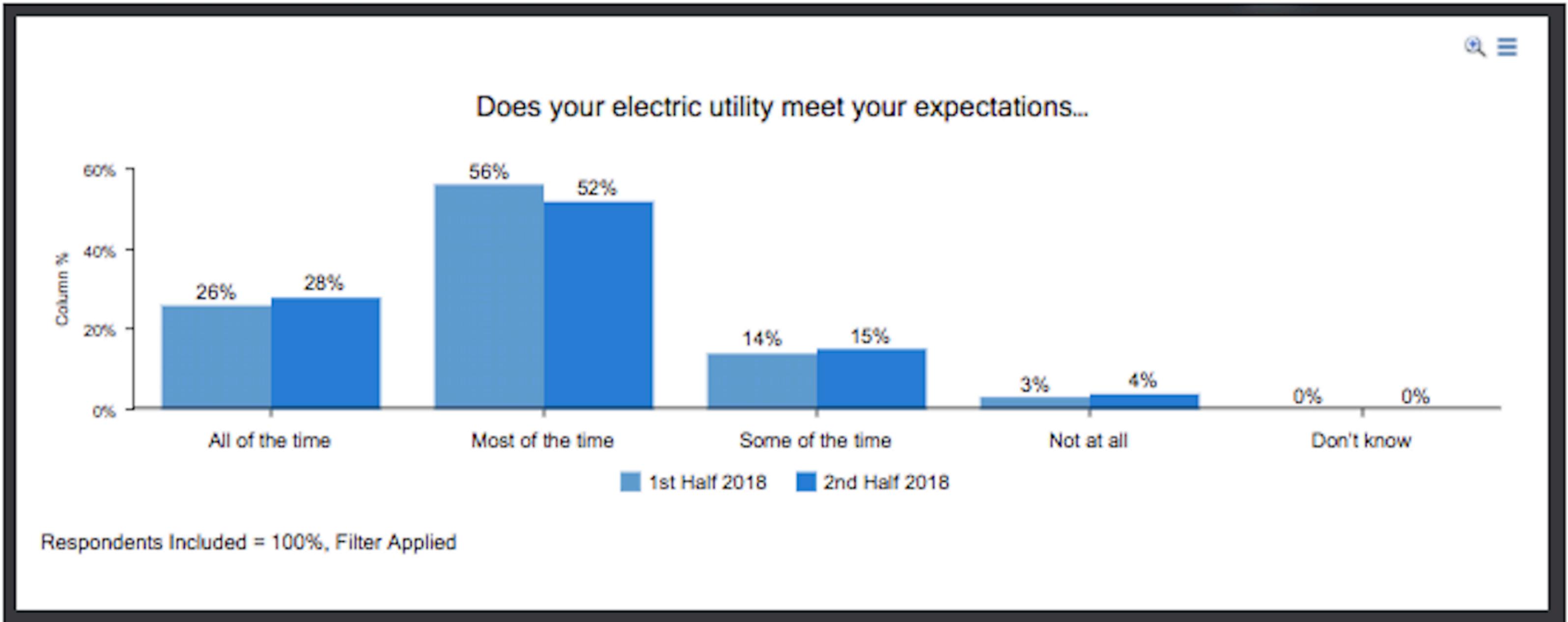


- **2017 Baseline Sample Plan**
 - 500 completed surveys per region
 - Increases with subscriber growth
 - 3,000 total completed surveys (quarterly)
 - 12,000 total completed surveys (annually)
- **2018 Tracking Sample Plan**
 - 3,000 total completed surveys (quarterly)
 - 12,000 total completed surveys (annually)



What Do Customers Think Of Your Utility?

Utility Meeting Expectations :: 2018





WHAT'S NEXT.

What would your local electric utility need to improve on or change for you to have a more ideal experience with them?

"Offer more energy efficient incentives such as discounts for solar panels, self water collection units, wind energy use, etc."

"More transparency in their rates and charges. Being a public utility, that is something that they're not very good at though."



"Improve, modernize their website. It's too much old school, not very practical to use."

"Lower prices and don't jack up prices in the winter months when we're using the same or less electricity in order to try and be more energy conscious and cost efficient."

National Customer Service Trends

Demographic Breakdown



71% of customers ages 35 and under rated their local utility as close to the ideal utility



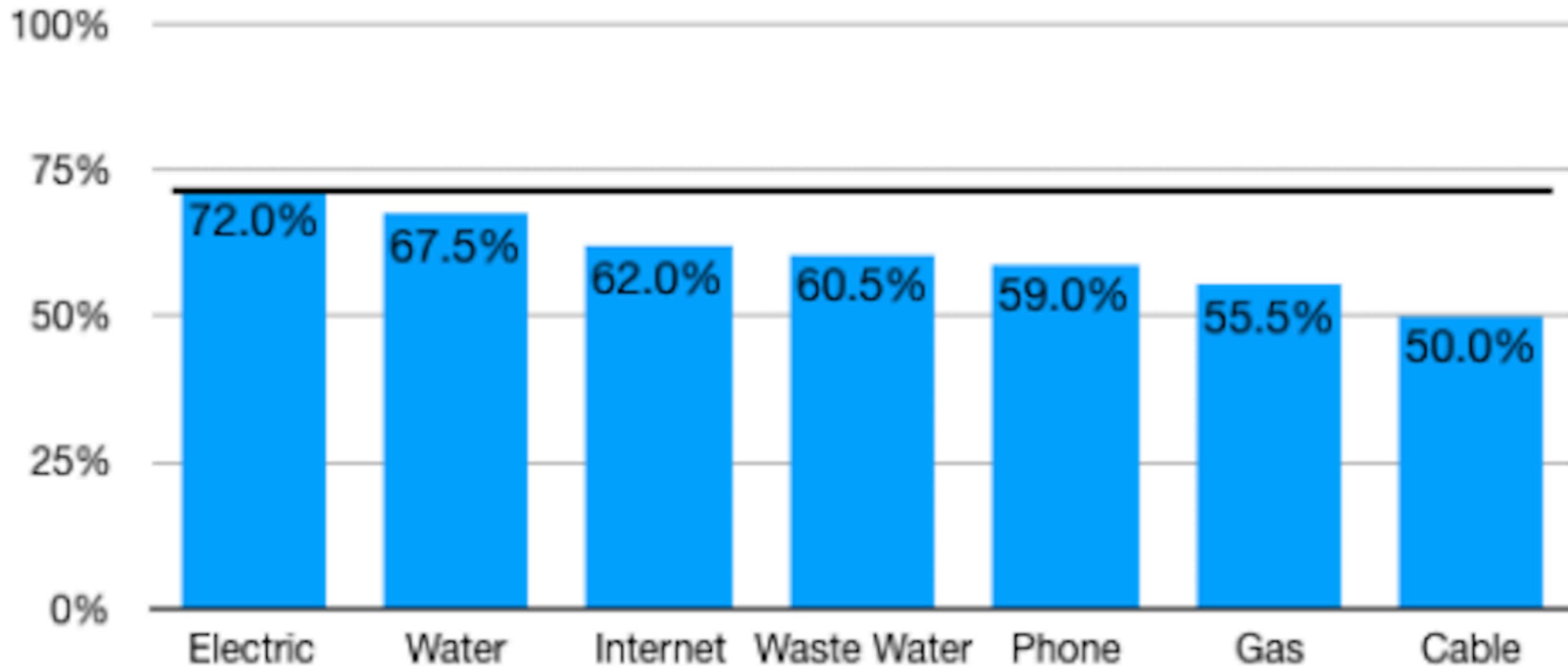
Slightly more females (69%) rated their utility as close to the ideal utility than males (68%)



There was a 6 percent increase in customers ages 45 and older who thought their utility was close to the ideal across 2018

National Utility Ratings :: 2018

Average Positive Ratings by Utility





Reasons for Multiple Contacts



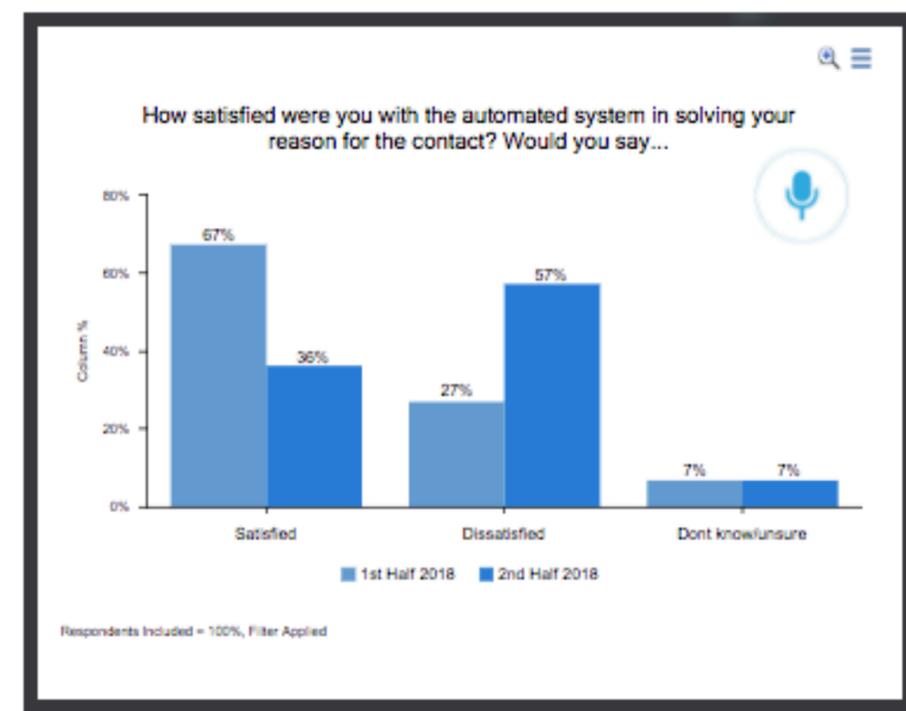
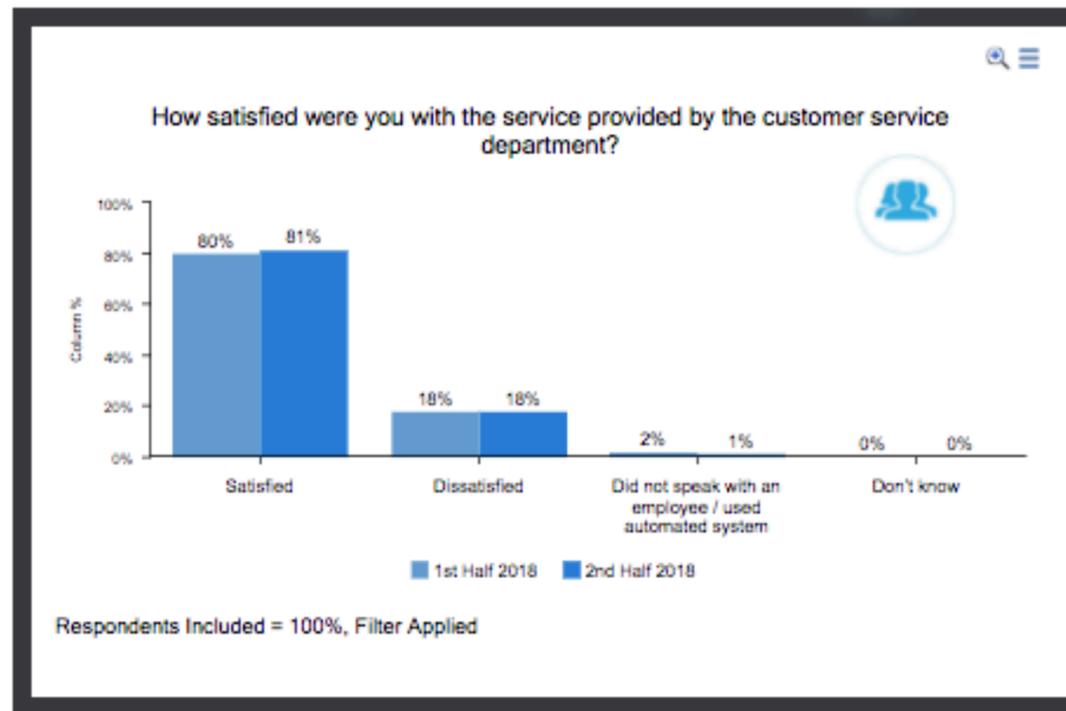
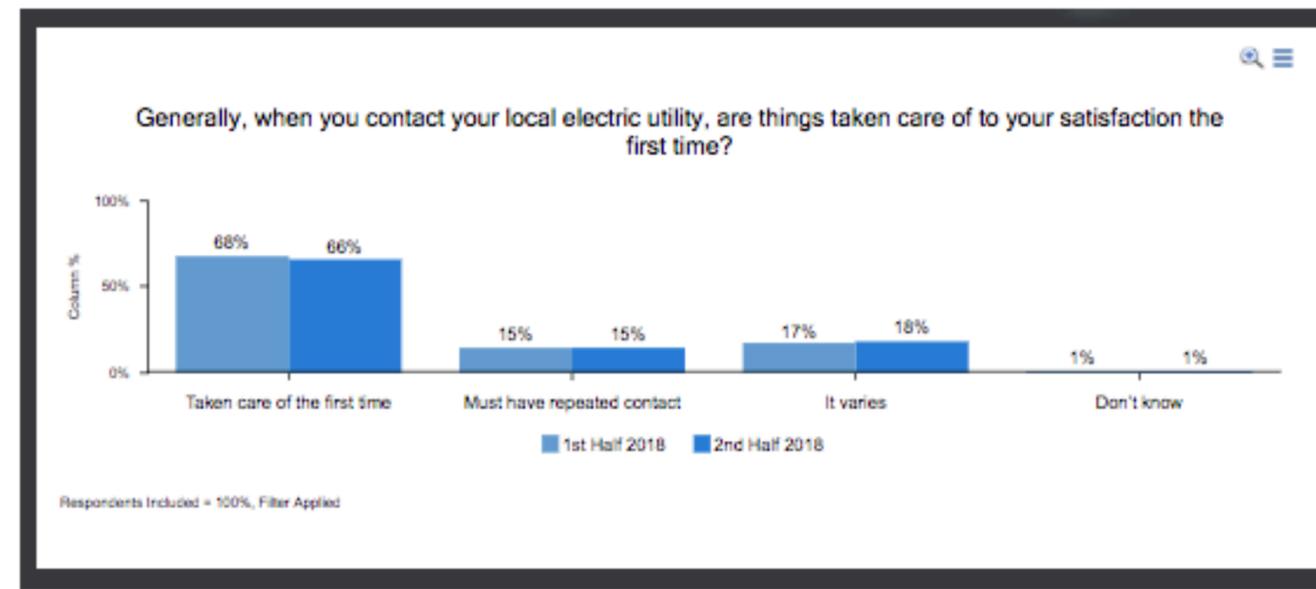
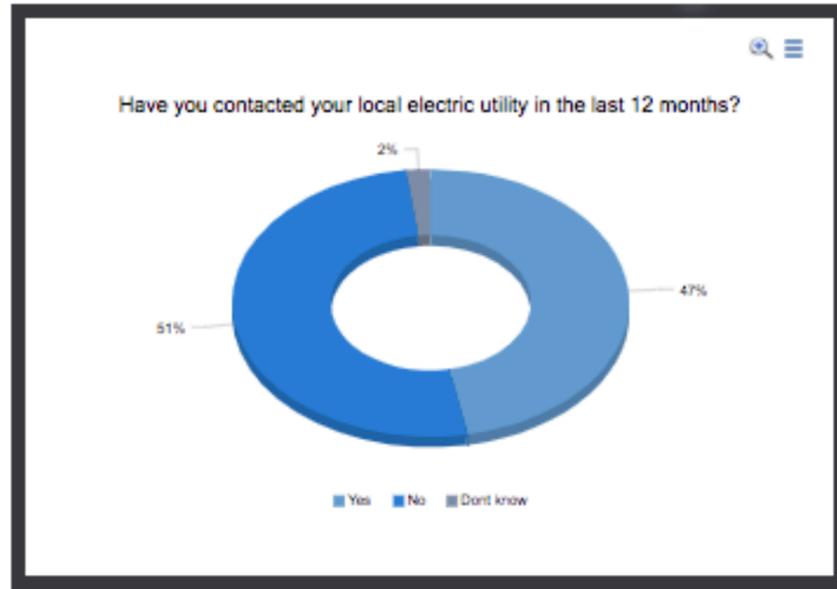
"Did not get the callback that was promised regarding when the power would return"

"Misinformation given first time, requiring multiple calls to get proper answer"

"Takes forever to go in and see them. I have to get back to work and cannot spend more than 40 minutes waiting for them."

Customer Service and Contact Resolution

Summary: Throughout 2018, there was a trend between the customer service department's ability to resolve issues upon the first point of contact and the satisfaction with the customer service department. On average, 67% of customers reported that their issue is typically taken care the first time they contact customer service, which corresponds with a high rate of customers reporting they were either "very satisfied" or "somewhat satisfied" with the service provided by the customer service department (80.5%).



- Introduction
- Customer Service
- Utility Ratings (pg.1)
- Utility Ratings (pg.2)
- Compare to Ideal
- Utility Attributes (pg.1)
- Utility Attributes (pg.2)
- Utility Attributes (pg.3)
- Customer Expectations
- Customer Comm. (pg.1)
- Customer Comm. (pg.2)
- Field Rep Metrics



Rating Your Electric Utility Across a Series of Attributes

Summary: Customers overall gave their local utility strong positive ratings for their ability to “provide good service and value for the cost of electricity,” averaging 65% positive across 2018. A factor of these strong positive ratings was most likely a corresponding increase in positive ratings for the utility’s ability to maintain modern and reliable infrastructure, which also resulted in a high average positive rating of 65% across 2018.

Demographic Breakdown



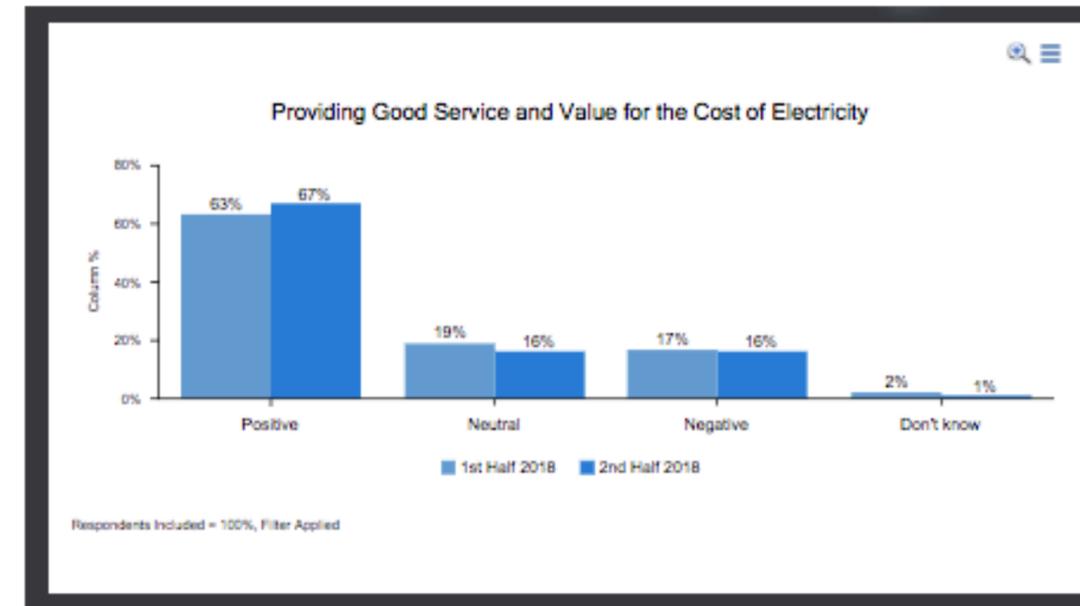
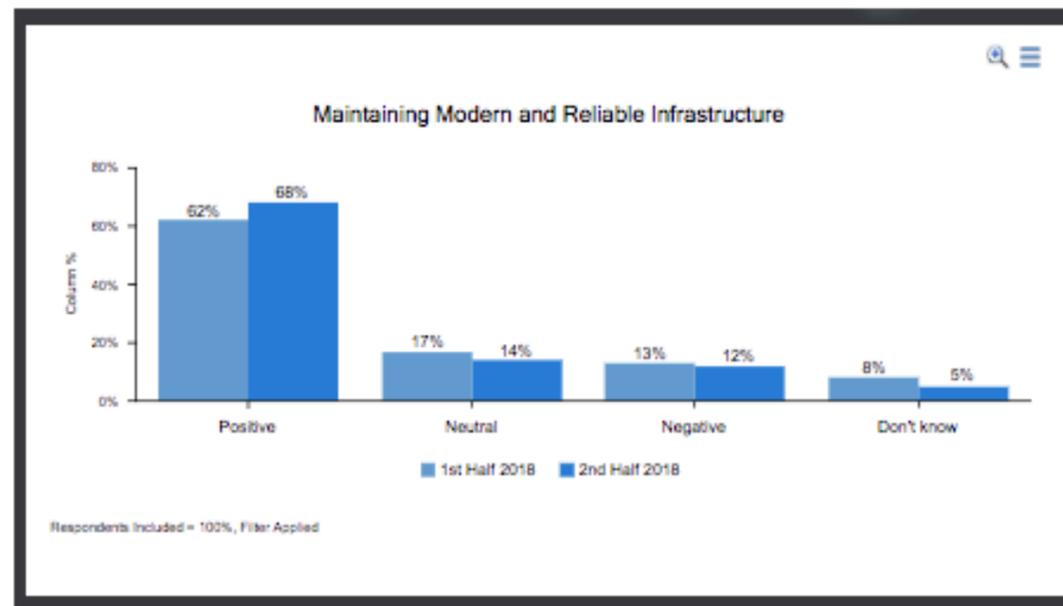
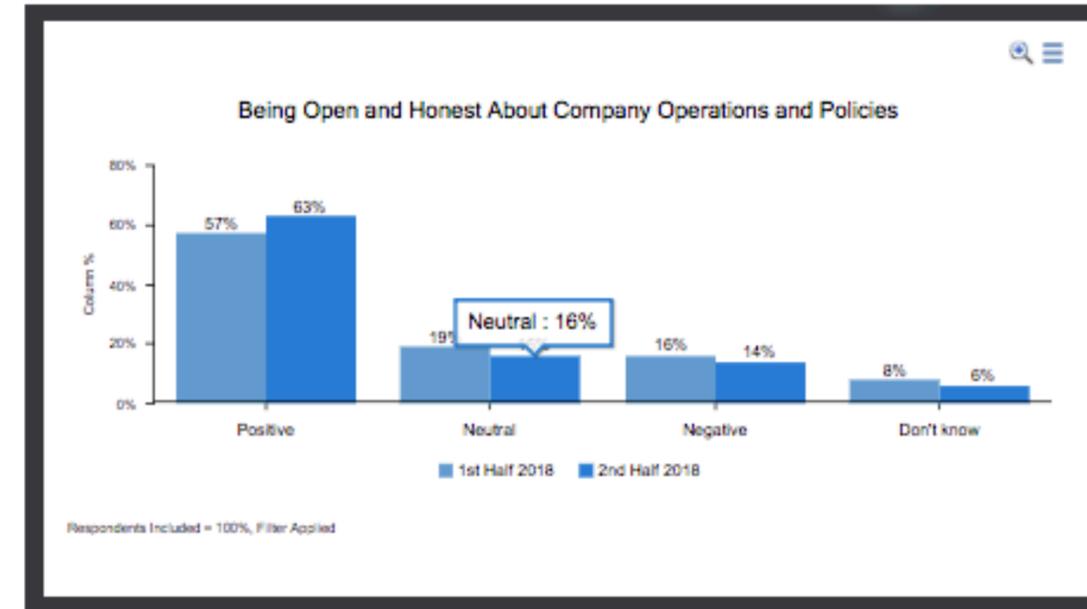
More customers under 35 felt their utility was open and honest with its operations and policies (62.5%) than those 45 and over (59%)



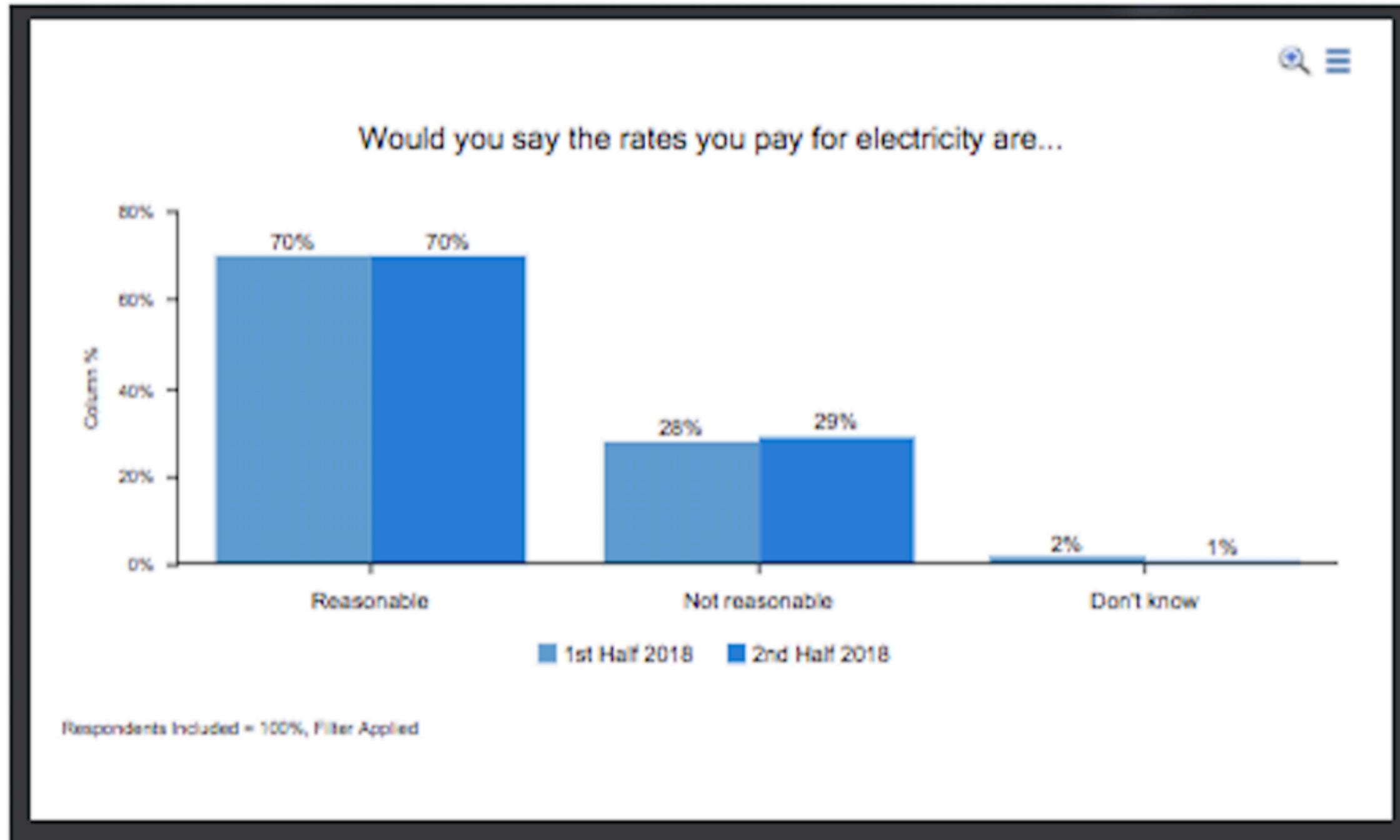
There was an 8 percent increase across 2018 in the percentage of customers 45 and older who rated their utility as maintaining modern and reliable infrastructure



More females (66.5%) rated their utility as providing good service and value for the cost of electricity than males (64%)



Reasonableness of rates :: 2018



Reasonableness of rates :: 2018 (Cont.)



More customers under 35 (75.5%) said that the rates they pay for their electric services were reasonable than those age 45 and over (68%)

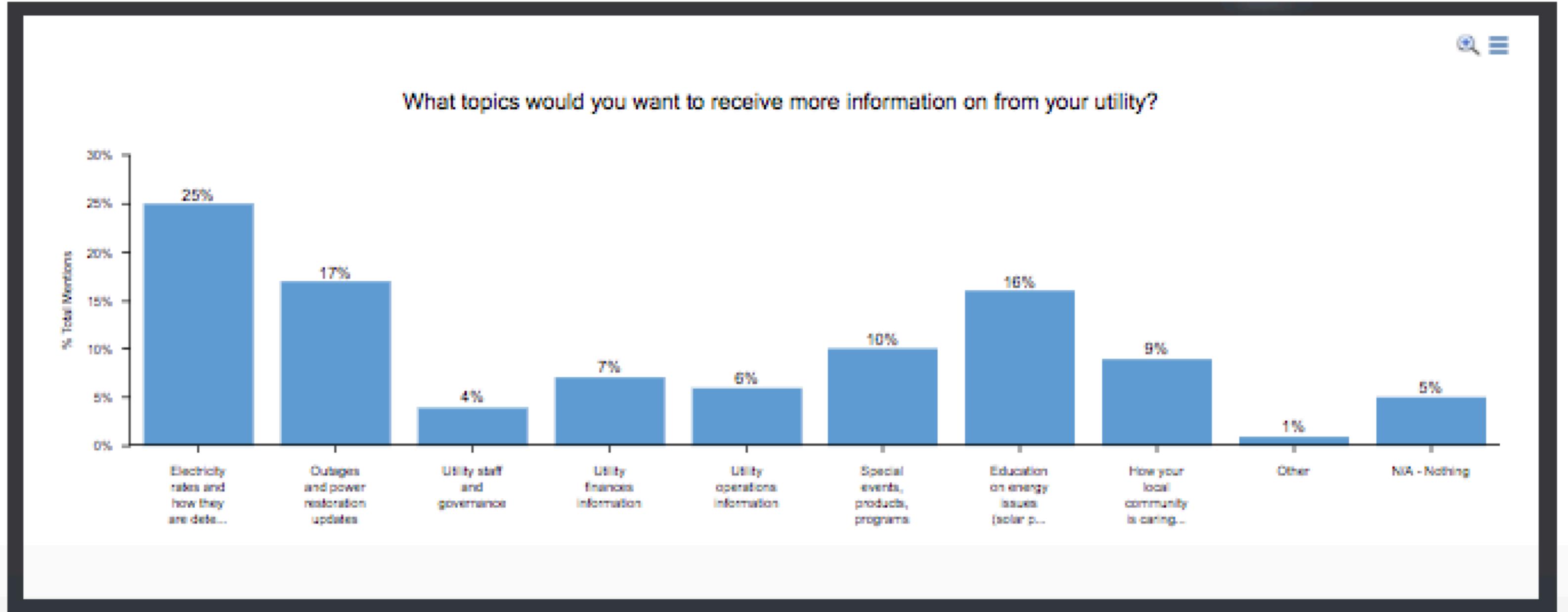


Slightly more males (76.5%) scored the rates they pay their electric utility as either "very" or "somewhat" reasonable than females (74.5%)



There was a 5 percent decline in the number of females who said their electric rates were reasonable across 2018

Topics of interest among customers :: 2018





Public Power

Industry Wide Trends

National Customer Service Trends

- Open/honest - clear, trustworthy, “nothing hidden” is cited as the most important factor customers note in discussing customer satisfaction
- Efficiency - quick, being responsive in dealing with all issues (1st contact vs 3rd where applicable)
- Knowledgeable - skilled, competent representatives who have the ability to provide sound information (or ability to connect customer with the proper person and knowing what q’s to ask)
- Effortless - simple, easy, intuitive process
- Personalized - tailored to “my” (being mindful of customer type) specific circumstance
- Energy efficiency & renewables - what is/should be offered, interest, pricing & payment options



To sum it all up...be sure to look at these key factors...

- what is good vs. what is wanted/needed
- expectations vs. what is actually being delivered
- where frustrations exist
- reliability, rates, customer service and transparency
- all communication not created equal - audience specific

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