

- 1 **Q. Please provide a copy of the Customer Survey Results conducted in February 2014**
2 **to obtain feedback on the effectiveness of the Company’s communications during**
3 **the January 2-8, 2014 period.**
4
5 A. Please refer to the response to Request for Information PUB-NP-118, Attachment A:
6 2014 Outage Survey Summary Report, March 14th, 2014.

2014 Outage Survey Summary Report
March 14th, 2014

**2014 Outage Survey
Summary Report
March 14th, 2014**



Introduction

In January of 2014, Eastern Newfoundland experienced the most significant series of power outage events in recent history. Over a one week period, the majority of residents across the region found themselves without power on multiple occasions, and at times for extended periods. And while the causes were beyond the direct control of Newfoundland Power (NP), the organization quickly found itself at the center of a major challenge: to effectively manage the available power in a manner that would minimize the impact on its customers.

Given the scope and duration of these events, a decision was made to conduct a post-event survey with customers. The goal being to gain valuable event knowledge so that communications planning for and during future events can benefit from the insights gained.

Project Objectives

Overall Objective

To better understand the effectiveness and impacts of Newfoundland Power's (NP's) communication efforts during the January 2014 outages. And to use the insights gained to benefit/improve communications efforts during future major events as appropriate.

Secondary Objectives

- Gain insight into customers interest/ability to absorb and understand information being provided during major outages
- Identify the preferred communications channels by customers during major events
- Gauge the impact of energy conservation messaging
- Obtain feedback from customers who reported an outage to NP
- Gain greater understanding of differences between customer groups (as identified by their geographic locations and demographics)
- Better understand how the frequency and duration of outages may impact peoples perceptions of NP's performance

Methodology

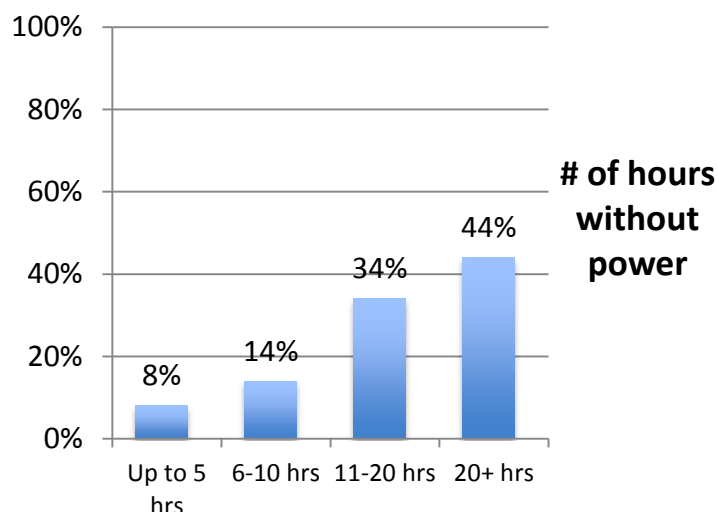
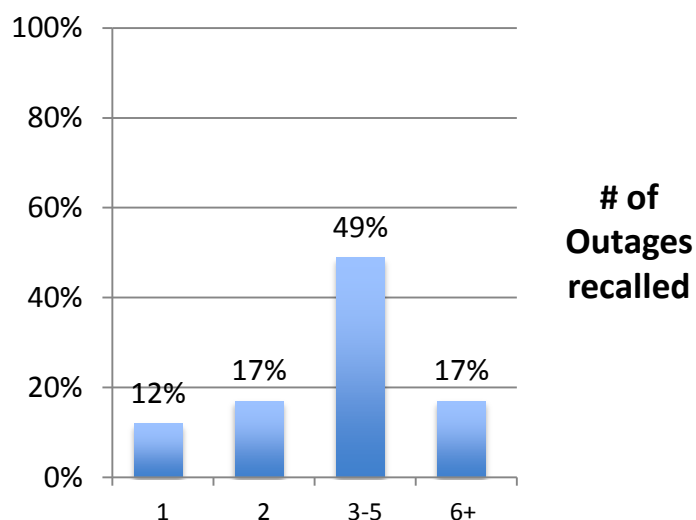
- Data Collection Method: Random telephone survey
- Sample Size: 400
- Geographic Scope: Residents of Eastern Newfoundland
 - All communities between Clarenville and the St. John's CMA* (including the Bonavista and Burin Peninsulas)
- Survey length: Approximately 15 minutes
- Margin of error: Plus or minus 5% at a 95% confidence interval (19 times out of 20)
- Collection Period: Data collection was completed between February 6 and February 10, 2014

*NOTE: The St. John's Census Metropolitan Area (SJ CMA) includes the following communities: St. John's, Conception Bay South, Mount Pearl, Paradise, Torbay, Portugal Cove-St. Phillips, Logy Bay-Middle Cove-Outer Cove, Pouch Cove, Flatrock, Bay Bulls, Witless Bay, Petty Harbour-Maddox Cove, Bauline

Scope of Event Impact

Context: In considering the responses of survey participants, the following illustrates the impacts that the outages had on NP customers.

- 99% of respondents recalled experiencing one or more outages
 - In SJ CMA 81% recalled experiencing more than 2 outages
 - In other Eastern areas 61% recalled experiencing more than 2 outages
- When events were combined, the majority of customers recalled that they were without power in excess of 10 hours
 - The average time recalled without power was 21.8 hours

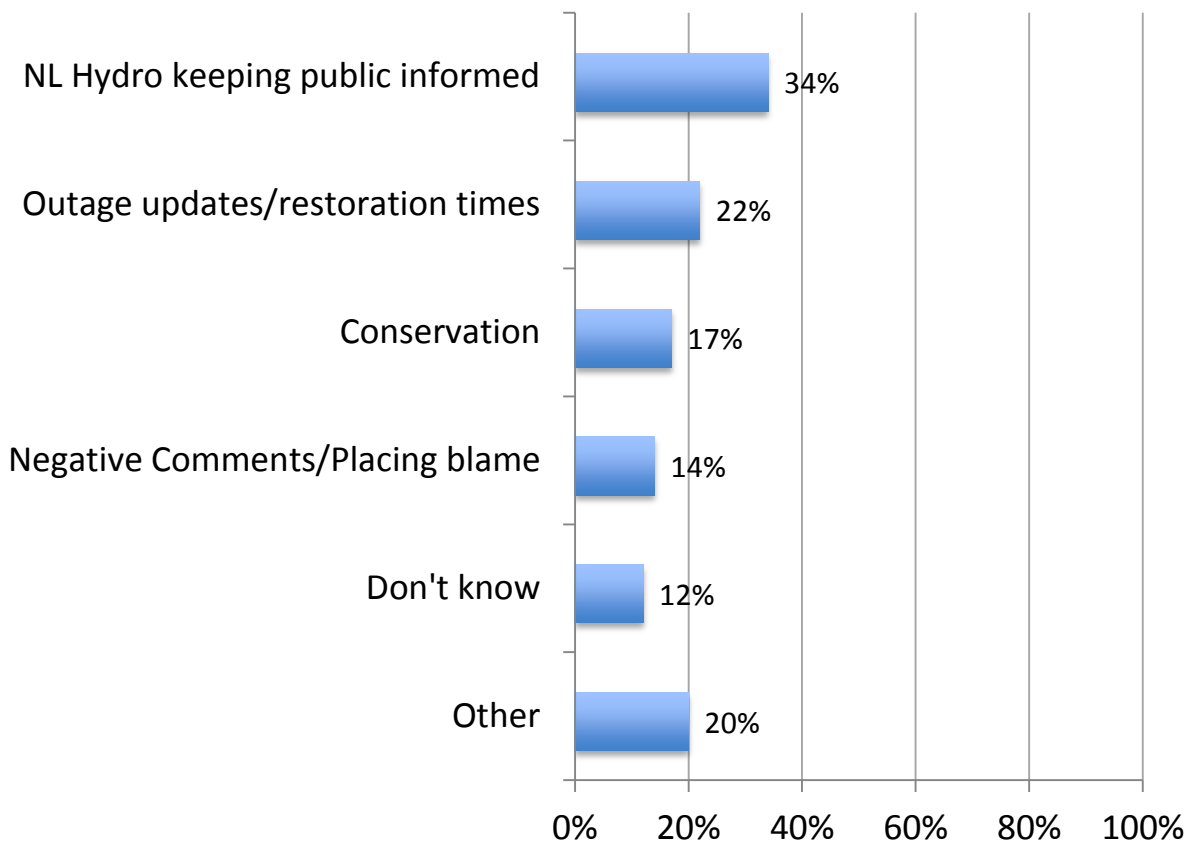


NOTE: While this slide provides helpful context for the scope of events of January 2014, it is a general impression based on customers recall of events, versus a technical summary. The real value in this exercise comes in the assessment of how frequency and duration of outages impacted customers perceptions, attitudes and actions.

Communications Recall

Context: Communications can play a vital role in keeping customers informed and prepared during power outages. But what do customers actually hear and remember?

Unaided Recall: *“When you think of all communications...what were the main points being communicated to the public?”*



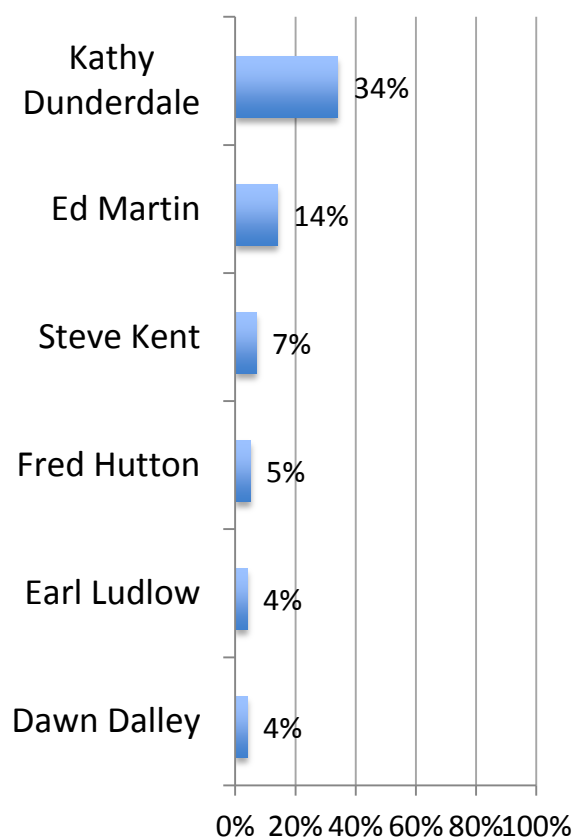
- SJ CMA customers were more aware of communications topics than those outside the CMA

NOTE: Negative/blame comments ranged from “general negative” to placing blame on Hydro, NP, government or more specifically: Holyrood.

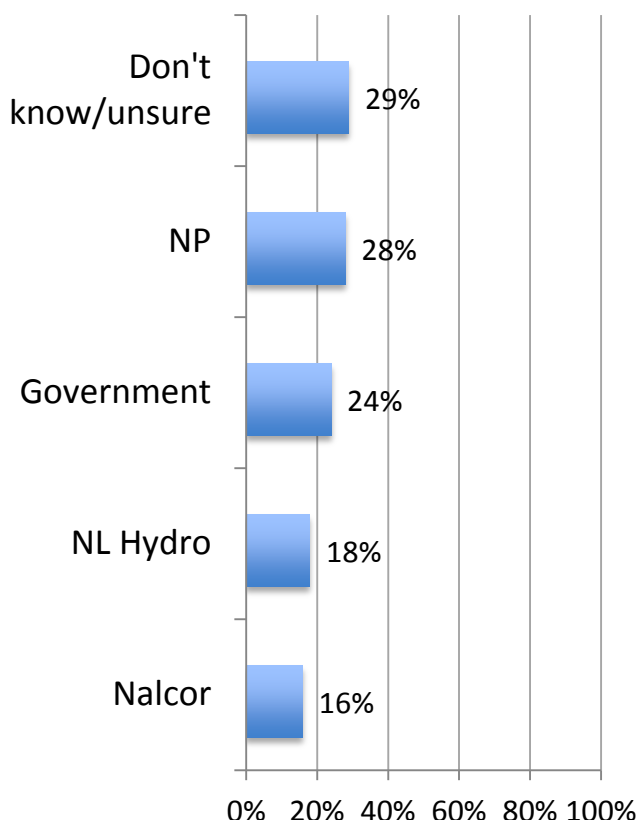
Communications Recall

Spokesperson recall: *“What spokesperson do you recall speaking to the public about outages?”*

The Person



The Organization



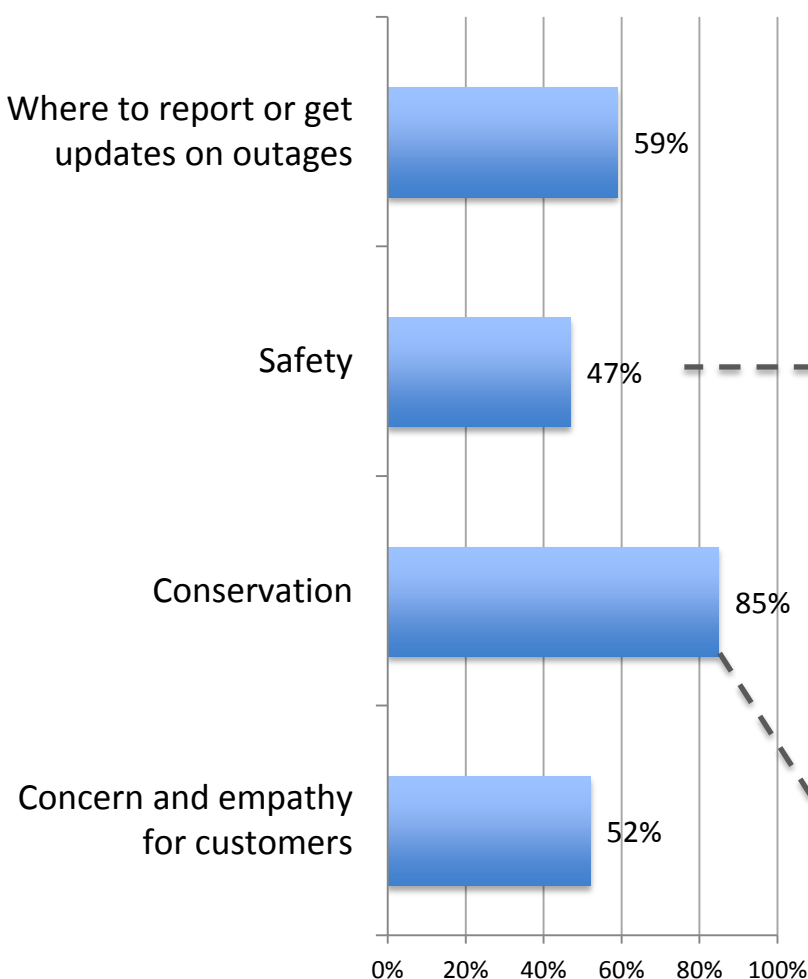
- 45% either didn't recall anyone specifically, were unsure, or couldn't remember a name

- People who referenced NL Hydro or Nalcor generally did not reference both together

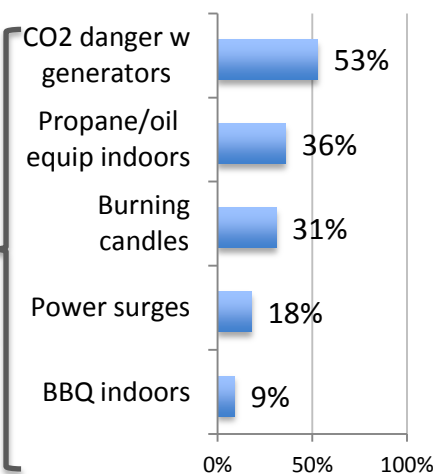
Communications Recall

Aided recall of NP messages: *“Do you recall seeing or hearing any of the following messages from NP?”*

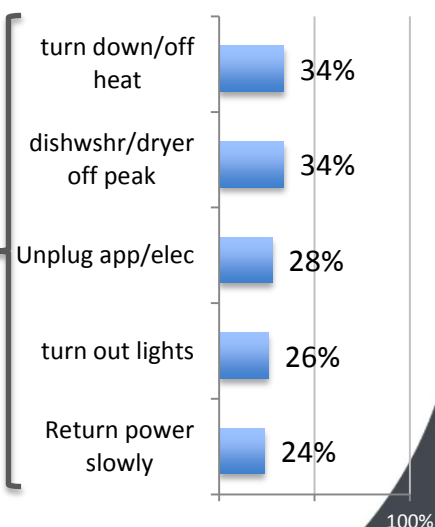
Recall of overall messages



Safety messages recalled



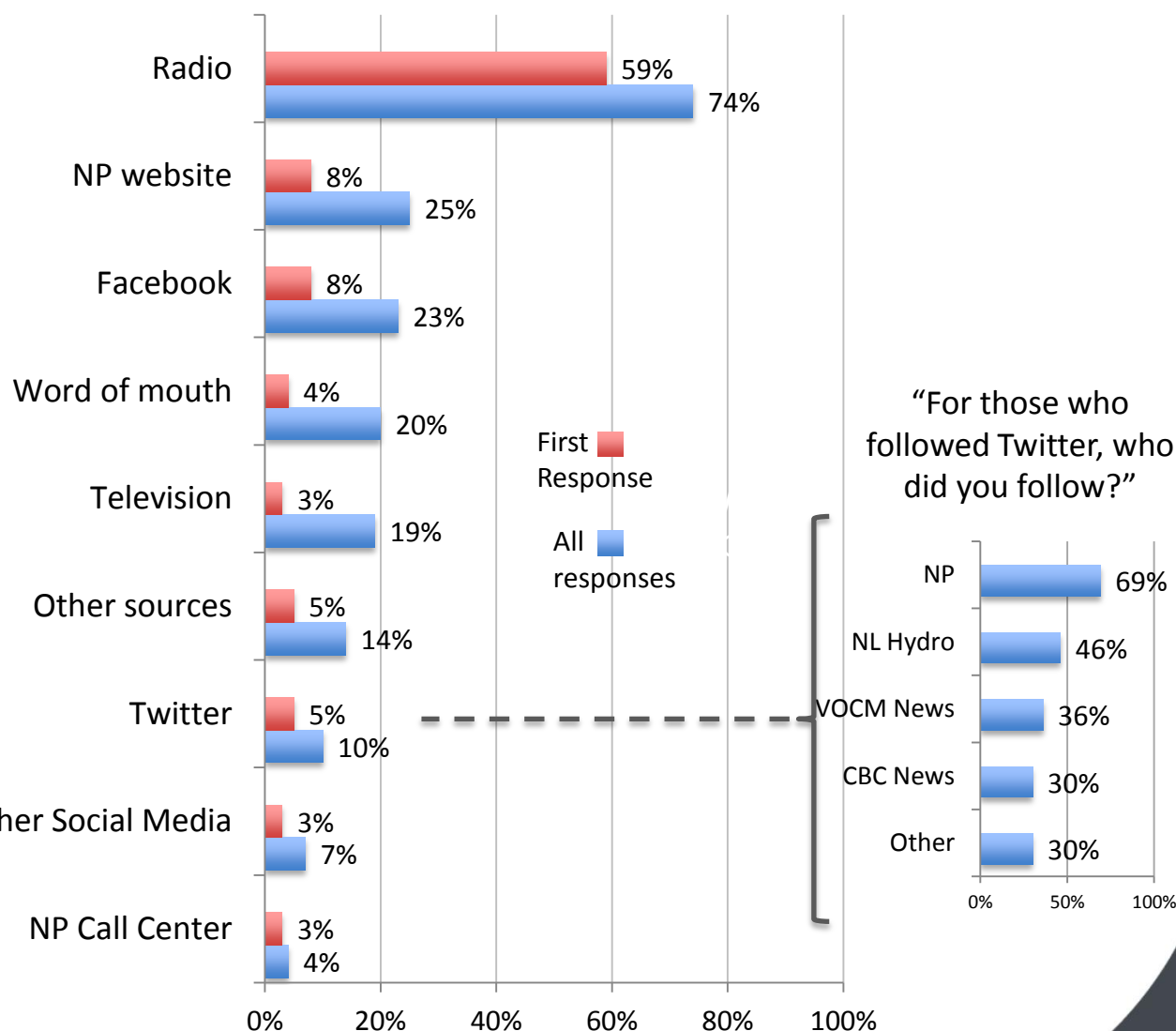
Conservation messages recalled



Information Sources

Context: Understanding where customers look for information during outages is vital in building future communications plans.

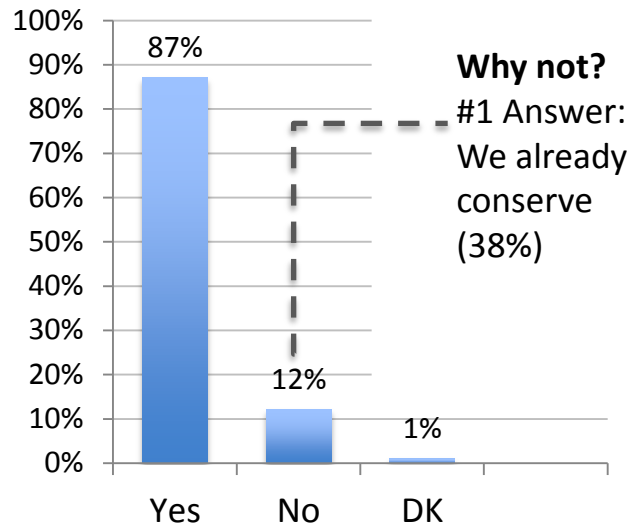
Question: “What information source(s) did you rely on most for information during the outages?”



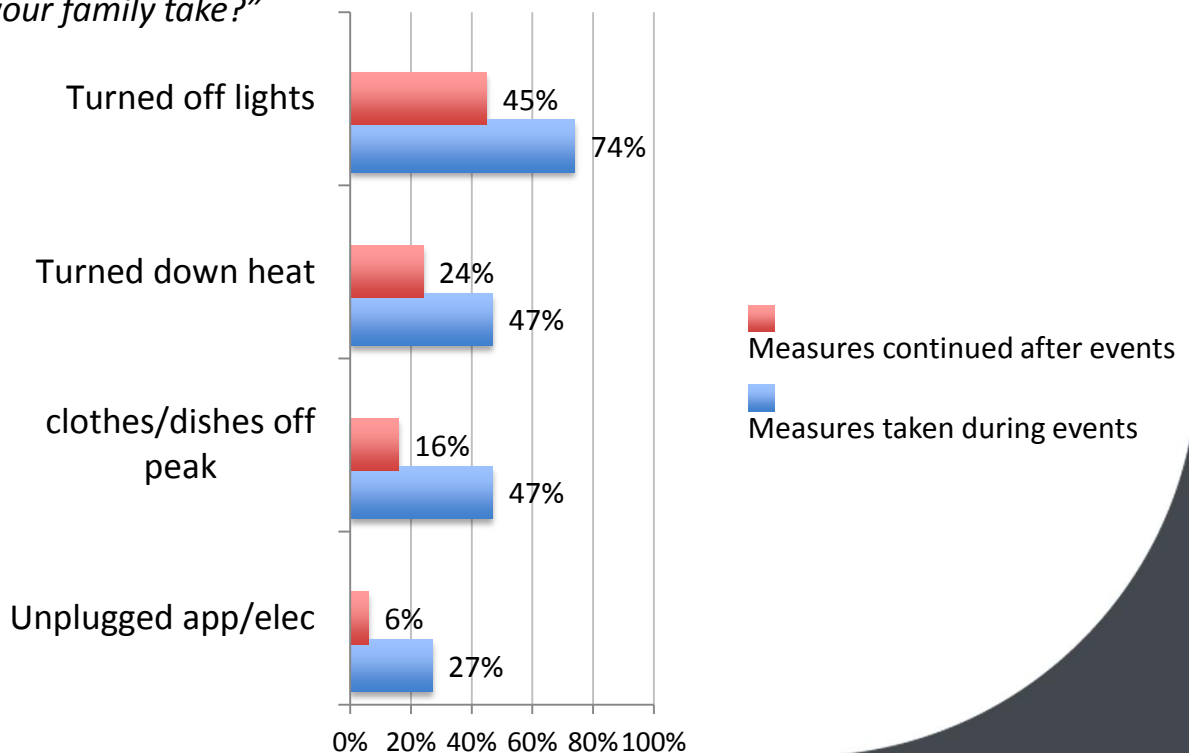
Energy Conservation

Context: Energy conservation can be very important, but only if customers make the effort. How much of an impact did energy conservation messaging have during these major outages?

Question: "Did you or anyone in your household practice energy conservation measures that you normally wouldn't have done?"



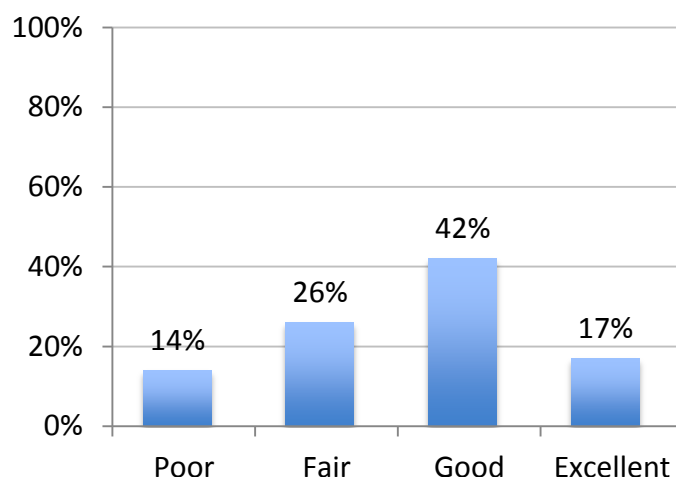
Question: "What measures did you and your family take?"



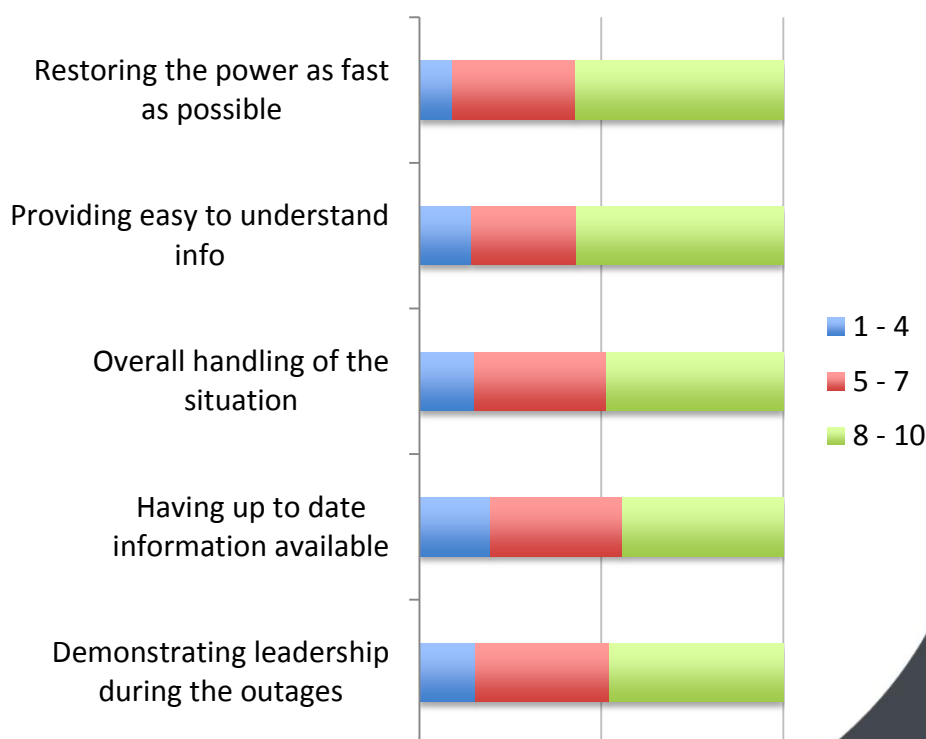
Customer Ratings of NP's Performance

Context: What were customers perceptions of NP's performance during the events of January 2014?

Question: "In your opinion, did NP do an excellent, good, fair or poor job of keeping customers informed during the outages?"



Question: "On a scale of 1-10, how would you rate NP on the following measures?"



Reporting Outages

Context: Despite the fact that most communications efforts are in the “mass market category” during outages, direct contact is still an important component of customer service during outages. So how did NP perform in the eyes of customers?

Question: “Did you report an outage to NP?”

11% said Yes

- 83% of those who said yes used the toll free line
 - 63% of the toll-free callers spoke directly with a representative (versus an automated response)
 - 50% of them rated the call an 8 or higher (42% said 10 out of 10)

NOTE: Due to low incidence levels on this topic, only highest response percentages are presented, for trending insights only.

Demographic Insights

Context: In general, not everyone hears (or interprets) communication in the same manner. However, in optimizing communications efforts there are often common threads to be found in common groups of people. So who heard what from NP?

Age-Based Insights

18-34 year olds

- Most supportive of NP's performance during the outages (generally highest ratings)
- Most likely to have taken more specific efforts to conserve energy
- Strongest users of social media for information, but still typically under 20%
- Most aware of reasons for outages

35-54 year olds

- More likely to be tuned-in to safety related messages
- Most likely to conserve energy by washing dishes/clothes in off peak hours

55 years plus

- Least informed/aware of details of "what's going on"
- Primarily focused on "when the powers coming back"
- Dominant users of VOCM radio for outage information (88%)
- Generally the least satisfied with the performance of NP

Demographic Insights

Gender-Based Insights

- In most cases, responses varied little based on gender. The notable exceptions included:
- Males were:
 - Twice as likely to report an outage (and they were more likely to be dissatisfied with the service they received)
 - More critical of NP's performance
 - More likely to understand NP's role in distribution versus generation
 - More likely to use Twitter
- Females were:
 - More supportive of NP's performance
 - Found the information from NP more helpful
 - More tuned-in to conservation
 - More likely to use Facebook
 - More likely to go to the NP website

Demographic Insights

Insights based on area of residence

The most significant difference between responses of SJ CMA residents and those living elsewhere in Eastern Newfoundland was that SJ CMA residents were generally more engaged with the events. They were:

- More aware of the news stories and the spokespeople and their organizations
- More likely to have recalled NP messages
- More likely to have heard conservation messages and practiced conservation measures

Further to these insights, and possibly contributing the differences:

- Respondents from Eastern NL indicated having less outages overall (resulting in a lower level of personal impact and engagement)
- Respondents from Eastern Newfoundland were less likely to have electric baseboard heat, and so may have remained more self sufficient during the outages

Insights based on income

With respect to income, of particular note are the mid/lower income groups where there is an appearance of wider spread “disengagement” (or lower levels of engagement).

- Much higher levels of “don’t know, unsure, never heard anything”
- Less likely to tune-in to, or practice conservation
- Least connected to NP’s information tools (call center, web site, social media)
- Most neutral with respect to their feedback about NP’s performance
- Less likely to understand NP’s role in power generation/distribution

How Frequency and Duration impact Customer Perceptions

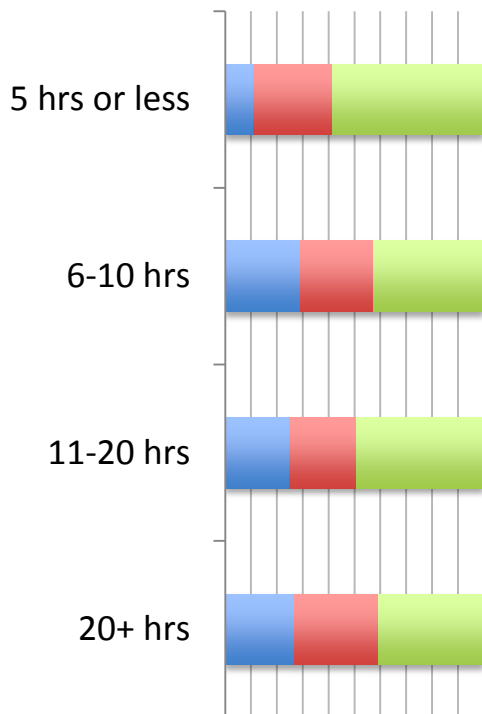
During study analysis, frequency/duration of outages was assessed to better understand how these factors may impact customers perceptions. In this case, during a major event such as occurred in January, what impact does the frequency/duration of outages have on customers perceptions of their service provider?

Factor #1: Frequency/Duration of Outages

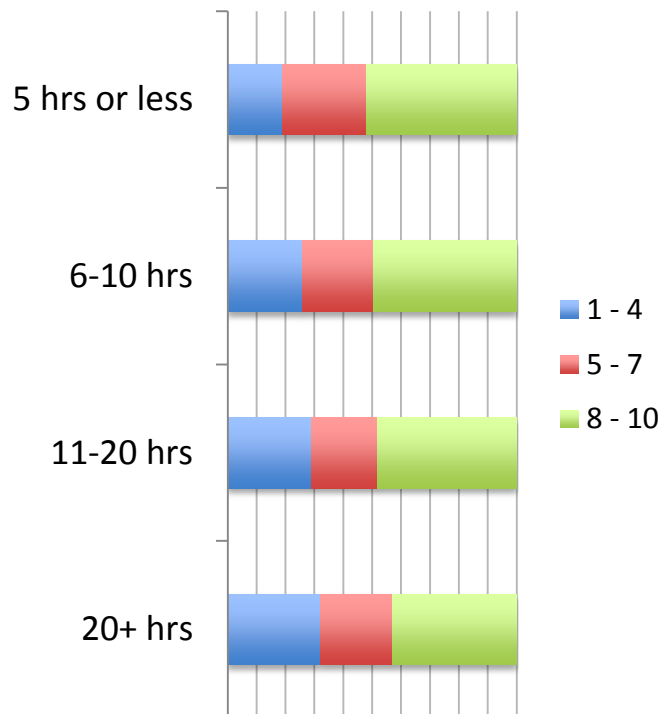
Context: Understanding how the frequency and durations of outages impacts customers attitudes and perceptions during major events, can provide valuable insight into how to adjust communications over the course of the outage(s) to meet customers information needs.

The following tables demonstrate how the “length of time without power” impacts customers perceptions of their energy provider’s performance.

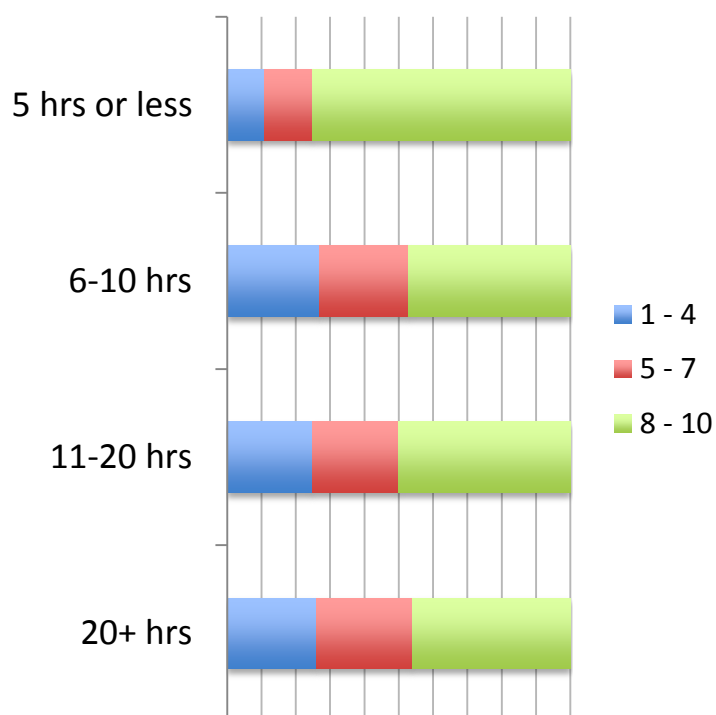
“Demonstrating leadership during the outages”



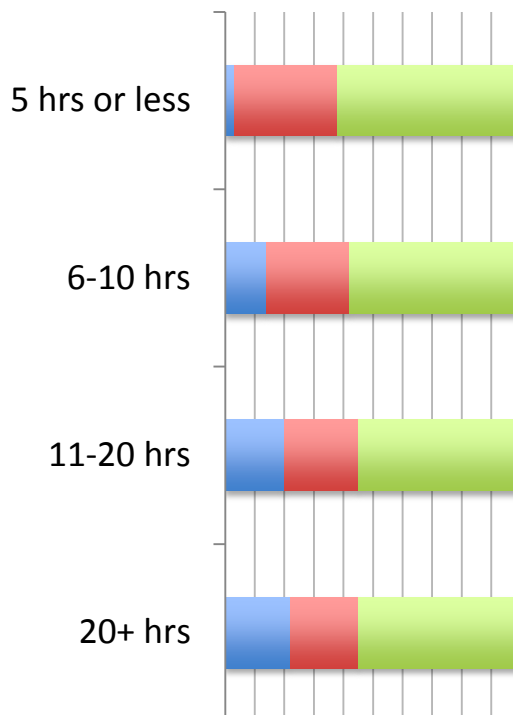
“Having up-to-date information available”



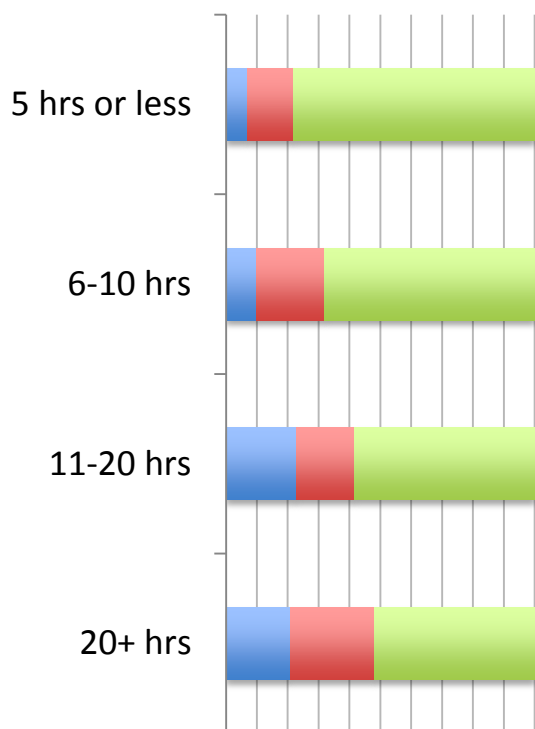
"Overall handling of the situation"



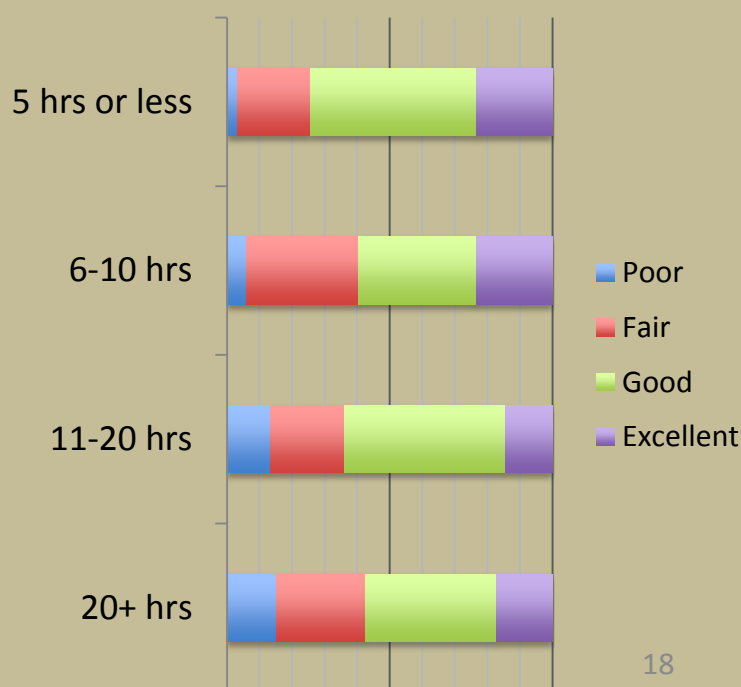
"Providing info that is easy to understand"



"Restoring power as fast as possible"



"Overall performance by NP in keeping customers informed during the outages"



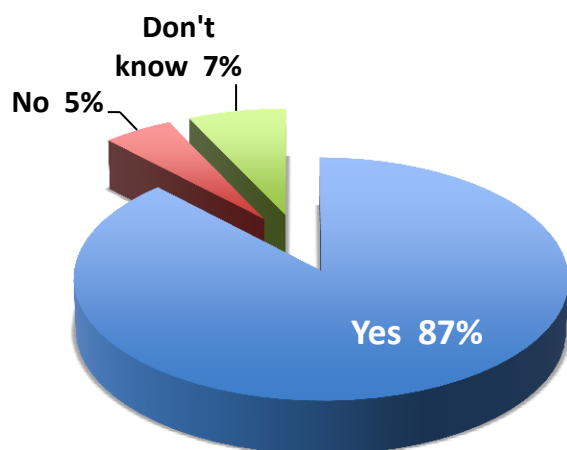
Perceived Role of Newfoundland Power

Context: Based on the findings there is an element of uncertainty regarding the role of Newfoundland Power versus Newfoundland and Labrador Hydro. This can impact levels of customer satisfaction.

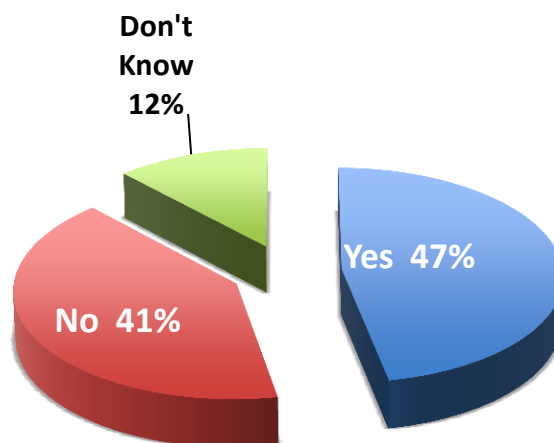
Extent of role confusion

We asked customers if “to the best of their knowledge” NP was a distributor of power, and if they were a generator of power.

“Is NP responsible for the distribution of power to homes in Newfoundland?”

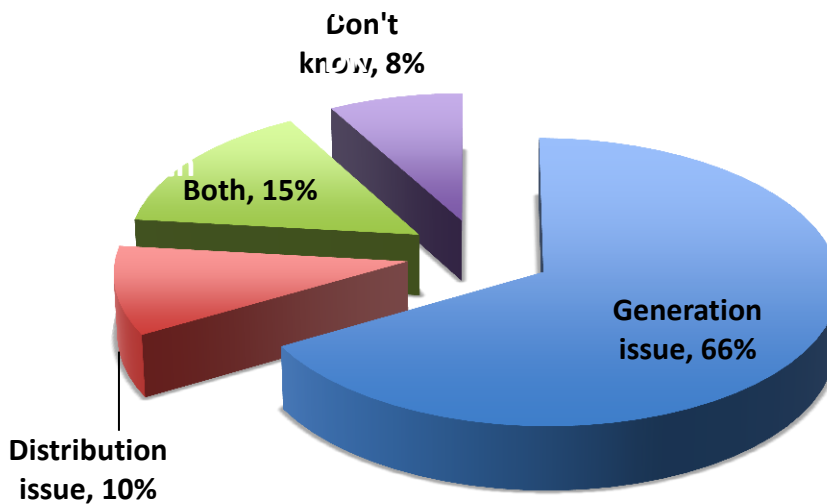


“Is NP responsible for the generation of power?”



Perceived Role of Newfoundland Power

Additional clarity: We then asked customers if “to the best of their knowledge, the power outages in early January were a power generation issue, a power distribution issue or both?”



- Customers generally got it right, and responses were reasonably consistent across all demographics.

Insight: Customers affected by the outages in January 2014 generally understood the cause of the outages, however there remained some level of confusion in the roles of NL Hydro and Newfoundland Power in resolving the outages.

APPENDIXES

The final project questionnaire and data tables and are included with this report as a separate file